U.S. DEPARTMENT OF COMMERCE

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NATIONAL TRAVEL AND TOURISM OFFICE

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OVERVIEW SESSION

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THURSDAY
JUNE 1, 2023

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The Session convened via Videoconference, at 10:30 a.m. EDT, Jennifer Aguinaga, Deputy Director, Policy and Planning, NTTO, presiding.

PRESENT:

BILL HORNBUCKLE, Chair; President and CEO, MGM
    Resorts International
BRAD DEAN, Vice Chair; CEO, Discover Puerto Rico
JULIE COKER, President and CEO, San Diego
    Tourism Authority
FRED FELLEMAN, Commissioner, Port of Seattle
LIZ FITZSIMMONS, Managing Director, Maryland
    Department of Commerce Office of Tourism
    and Film
MUFI HANNEMANN, President and CEO, Hawaii
    Lodging & Tourism Association
RUSS HEDGE, President and CEO, Hostelling
    International USA
STEPHANIE JONES, Founder and CEO, Cultural
    Heritage Economic Alliance
ANDREW LEARY, Director of Sustainable Tourism
    and Partnerships, Leave No Trace

PRESENT: (cont'd)

ERIC LIPP, Founder and Executive Director, Open
       Doors Organization
CASANDRA MATEJ, President and CEO, Visit Orlando
PETER MILLONES, Executive Vice President and
       General Counsel, Booking Holdings, Inc.
WILL MOREY, President and CEO, The Morey
       Organization
TRICIA PRIMROSE, Executive Vice President and
       Chief Global Communications & Public
       Affairs Officer, Marriott International
LANA RAMOS, Vice President, Marketing and
       Community Relations, Locally Grown
       Restaurants
CARROLL RHEEM, Founder and CEO, iolite group
DAN RICHARDS, Founder and CEO, The Global Rescue
       Companies
ADAM SACKS, President, Tourism Economics
JOHN SAGE, President, Accessible Travel
       Solutions
GREG SCHULZE, Senior Vice President, Strategic
       Travel Partners, Expedia
MONICA SMITH, President and CEO, Southeast
       Tourism Society
JERRY TAN, President and CEO, Tan Holdings
DONALD TAYLOR, President, UNITE HERE
PETER VAN BERKEL, President, Travalco USA, Inc.

ALSO PRESENT:

JENNIFER AGUINAGA, Deputy Director, Policy and
       Planning, National Travel and Tourism
       Office
BRIAN BEALL, Acting Deputy Assistant Secretary
       for Travel and Tourism and Director of the
       NTTO
CURT COTTLE, Tourism Policy Council Secretariat
DAVID HUETHER, Deputy Director, Research

1   P-R-O-C-E-E-D-I-N-G-S

2   (10:31 a.m.)

3   MS. AGUINAGA: Thank you all for being

4   here. For those of you who don't know me, my

5   name is Jennifer Aguinaga, and I'm the Deputy

6   Director for Policy and Planning in the National

7   Travel and Tourism Office. And I'm also the

8   Federal Officer for the Travel and Tourism

9   Advisory Board.

10   So at the request of one of the

11   members, which was a great idea, we wanted to

12   give this NTT NTTO overview for those of you

13   who don't know a lot about what the National

14   Travel and Tourism Office does. This overview

15   will be a little bit shorter than we had

16   originally planned, since we moved from in person

17   to virtual. And given the fact that it is very,

18   very early for some of you on the call, we are

19   going to do just a brief overview.

20   But if you would like more

21   information, we're happy to do one-on-one

22   meetings with any of you at your convenience. So

1 just let us know.

2 So what we're going to do quickly this

3 morning is just walking through a quick overview

4 of our office. We're going to talk a little bit

5 about the Tourism Policy Council and the National

6 Travel and Tourism Strategy. And then we're

7 going to be talking about our research programs

8 and hopefully have time for a short demo of some

9 of that work.

10 Logistically, we are going to try and

11 end around 10:50 to 10:55, since we'll all need

12 to jump over to the other meeting for the actual

13 Board meeting, which is a separate Teams meeting

14 invite, and also we'll be putting that info in

15 the chat towards the end of the meeting.

16 So with that, I will turn it over to

17 our actually pretty new Office Director and

18 Acting Deputy Assistant Secretary for Travel and

19 Tourism, Brian Beall.

20 MR. BEALL: Good morning, everybody.

21 It's so great to meet all of you. I see many

22 familiar faces. I had a chance to meet some of

1   you at IPW in San Antonio last week.

2   As Jennifer mentioned, I recently

3   started. I'm serving now as the Director of the

4   National Travel and Tourism Office and currently

5   as the Acting Deputy Assistant Secretary for

6   Travel and Tourism. So I'm going to give you a

7   really quick top line overview of what our office

8   does, and then I'll turn to my colleagues, Curt

9   Cottle and Dave Huether, to go into more detail

10   about the Tourism Policy Council, the National

11   Travel and Tourism Strategy, and our research

12   program and products.

13   So with that, we'll turn to the next

14   slide.

15   So really quickly, the National Travel

16   and Tourism Office, or NTTO as we call it, has a

17   few key objectives -- key activities and

18   objectives. Our office serves as the primary

19   point of contact for travel and tourism issues

20   within the Federal Government. We provide

21   research and national statistics on travel and

22   tourism to inform private and public sector

1 decisionmaking.

2   And we serve as the Secretariat for

3 the Tourism Policy Council, which is an

4 interagency body that coordinates government-wide

5 activities to support the growth of the industry.

6 And a key activity underway being led through the

7 Tourism Policy Council now is the implementation

8 of the National Travel and Tourism Strategy.

9   We also of course coordinate advice to

10 the Secretary of Commerce and the private sector

11 through the Travel and Tourism Advisory Board,

12 and we serve as the principal federal liaison to

13 Brand USA.

14   Additionally, we represent U.S. travel

15 and tourism policy in international fora, like

16 the Organization for Economic Cooperation and

17 Development's Tourism Committee, the Asia-Pacific

18 Economic Cooperation's Tourism Working Group, the

19 G20's tourism work stream, and other similar

20 multilateral groups where U.S. travel and tourism

21 policy is represented.

22   I'm getting a little bit of feedback.

1   MS. AGUINAGA: If everyone could just

2   mute -- we're hearing a little bit of feedback --

3   that would be great. Thank you.

4   MR. BEALL: So really quickly, those

5   are a couple of top line points regarding our

6   office and our activities. Again, as Jen

7   mentioned, happy to set up a call on anything we

8   cover during today's briefing for a one-on-one

9   discussion to go into more detail on anything of

10   interest.

11   So with that, I'd like to turn to my

12   colleague, Curt Cottle, who is going to talk to

13   you about the Tourism Policy Council and then

14   also the National Travel and Tourism Strategy,

15   both of which you'll be hearing a lot about

16   during our board meeting coming up in 25 minutes.

17   Curt?

18   MR. COTTLE: Thank you, Brian.

19   Next slide, please?

20   The Tourism Policy Council is mandated

21   by Congress. It is created by law, and it's set

22   up to coordinate policies and programs related to

1 travel and tourism, recreation, and natural

2 heritage, although primarily we focused on the

3 first part of that.

4 Next slide?

5 The Tourism Policy Council, as Brian

6 mentioned, was the body that led the development

7 of the National Travel and Tourism Strategy.

8 This slide is only meant to show you the

9 complexity of the Federal Government and how many

10 people were involved.

11 The first six here and OMB are

12 formally members of the Tourism Policy Council.

13 Agriculture and EPA and SBA have been

14 participating, along with CDC as invited members

15 as the law allows to do.

16 Next slide?

17 So the strategy, as you well know, is

18 focusing our federal efforts to support travel

19 and tourism. There are lots of phrasing in there

20 about working with state, local, tribal, and

21 private sector, but this is sort of a

22 federally-led USG document.

1   You were instrumental in helping us

2   create the goal. Thank you very much. It is

3   90 million visitors, 279 billion annually, by

4   2027, and it envisions how the private and public

5   sectors will work together. And a key phrase

6   here is the value and volume. We wanted to get

7   beyond just a numerical goal.

8   Next slide?

9   So it, as a reminder, has four pillars

10 promoting the U.S. as a travel destination,

11 facilitating travel, ensuring a diverse,

12 inclusive, and accessible tourism experience, and

13 fostering resilient and sustainable travel and

14 tourism.

15   The first two could be found in the

16 2012 National Strategy. The second two are new

17 for this go-round.

18   Also, a difference I should mention is

19 the 2012 strategy was a 10-year strategy. Coming

20 out of COVID, there was no way we could predict

21 that far into the future, so this is a five-year

22 strategy.

1   So I'll go roughly quickly through

2   this. I won't repeat the information that is

3   here, because you can look at it. What I thought

4   would be more helpful is to sort of talk about

5   some of the specifics in terms of what goes under

6   here.

7   So you'll be hearing, you know, about

8   tourism country plans. That's under strategy 1,

9   working on helping promote accessible travel,

10 working with outreach to diverse communities to

11 make sure they are part of the picture, that they

12 are promoted as part of the U.S. marketing

13 message, the Recreation Economies for Rural

14 Communities Program, getting communities better

15 positioned for travel, and also promoting

16 responsible travel messages.

17   I know that NOAA, NPS, Forest Service,

18 BLM, are already in this space with responsible,

19 sustainable travel messaging. But we want to see

20 if there is more synergy in working together, and

21 then, obviously, leveraging large-scale events

22 like the Olympics and the World Cup that is just

1   around the corner.

2   Under facilitation, we are looking at

3   things like borderless visas and touchless

4   technology biometrics, remote processing, cross-

5   border work with Canada to make things easier

6   between the two countries, and TSA's One-Stop

7   Pilot Project with the U.K. Those are the kinds

8   of things that will pop up here under

9   facilitating travel.

10   Under diverse travel, this is lots.

11   It's two slides' worth of stuff. There are so

12   many ideas that were coming into place, because

13   it wasn't just the diversity. It wasn't just the

14   inclusiveness. It was a lot of the issues and

15   supporting the destinations and supporting and

16   the land and water agencies and the product that

17   they have as well.

18   So there is an enormous amount of work

19   that is with Native communities coming out of the

20   Native Act, but also there are lots of Office of

21   Indian Affairs in federal departments already

22   that are in this space.

1   The National Park Service is

2   broadening the national register, so that it is

3   more representative of the United States. There

4   is money for Historically Black Colleges and

5   Universities. There is -- the Corps of Engineers

6   is doing a -- developing a tool for sign language

7   at some of their facilities. There is digital

8   accessibility. There is activities around

9   visitor management.

10   All of these -- and not to mention

11   significantly all the workforce issues are in

12   this section. So there is a tremendous amount of

13   work being done within the diverse, inclusive,

14   and accessible tourism experience.

15   And then sustainability, another new

16   area for us that includes sharing best practices,

17   the investments in EV and EV infrastructure,

18   sustainability tools and metrics, sustainable

19   fuels.

20   An exciting thing that I think you'll

21   hear about is the White House has committed to a

22   satellite account, which sounds sort of esoteric

1   for the environment. But if you think about how

2   much we gained -- and Dave can back me up -- from

3   having a tourism satellite account, so that we

4   know the contributions of travel and tourism to

5   the national economy -- and we have an outdoor

6   recreation account now, so we understand how that

7   -- so adding an environmental satellite account

8   to this will give a much more complete picture in

9   the space of how sustainable travel and tourism

10   contributes to the national economy.

11   And I think that's it for me, so I'll

12   turn it over to Dave.

13   MR. HUETHER: Thanks, Curt.

14   Next slide, please?

15   So, hi, everybody. So my name is Dave

16   Huether. I am the head of research here at NTTO.

17   And what I'm going to do is I'm going to share my

18   screen, and I'm going to go over some products

19   with you.

20   Does everybody see my screen?

21   MR. COTTLE: Yeah. You're good, Dave.

22   MR. HUETHER: Okay. Good. Thanks.

1   So the research part of NTTO, we are

2   in charge of estimating and publishing

3   international travel volume to the United States

4   from 250 countries and regions that we do every

5   month. We also publish visitation by visa type,

6   by age, by port of entry, by first visit for most

7   of the major inbound countries of the world.

8   That's a significant research product of ours.

9   The second one, which is the most

10   important, is the Survey of International Air

11   Travelers. Once international air travelers come

12   to the United States, once the international

13   visitation comes to the United States, where do

14   they go? How much money do they spend? What

15   activities are they involved in?

16   So every year we survey more than

17   100,000 international visitors, and from that

18   we've got very good market profile data.

19   In addition to that, we forecast

20   international travel to the United States, and we

21   paused that during the -- during the COVID period

22   of time, the last couple of years, but we began a

1   new forecast for international visitation earlier

2   this year.

3   Finally, we report on the spending by

4   international travelers to and from the United

5   States, as well as fund and publish the tourism

6   -- travel and tourism satellite account that Curt

7   mentioned.

8   One of the major areas that we have

9   been investing in the last couple of years has

10   been data visualization. So whether or not you

11   go to our I-94 program, which is inbound travel,

12   or you go to our I-92 program, which is

13   international air passenger volume, or you go to

14   the Survey of International Air Travelers

15   Program, each one of those we have developed data

16   visualization tools.

17   I'm going to show you one of them

18   right now, actually two of them. So the first

19   one, and probably the most powerful one, is the

20   Survey of International Air Travelers. And how

21   to use it is as simple as one, two, three. You

22   pick a year from 2012 to 2022. We just published

1   updated 2022 several weeks ago.

2   You pick -- if you want to look at a

3   particular overseas market, so I will go down

4   and maybe I will look at Germany. And then if I

5   want to see where the Germans went, I go and look

6   at destinations and hit go, and there we go.

7   That shows you in 2022 where the 1.5 million

8   German visitors went.

9   So in addition to destinations, we

10   have information related to trip planning, travel

11   party size, activities and purposes of the trip,

12   accommodations of transportation destinations, as

13   well as spending and income.

14   Now, this is not inclusive of the

15   entire Survey of International Air Travelers. We

16   developed this about a year and a half ago. We

17   are working on doing two things that is going to

18   make this information even more useful to the

19   travel industry.

20   Number one is that we are going to

21   expand what you can analyze to basically all the

22   questions in the slide, and there are about

1   30 questions.

2   Number two is that we are going to

3   increase the frequency of the Survey of

4   International Air Travelers from annual to

5   quarterly. So you will be able to look in real

6   time about where international air travelers are

7   going. So that is one exciting tool.

8   The second tool I want to show you

9   real quick is the -- what we call the APIS I-92

10   monitor, which basically follows or allows you to

11   analyze air passenger volume from every

12   international airport in the United States to

13   every international airport in the world. And it

14   can be done on an annual basis or on a monthly

15   basis.

16   So what I have right here is all

17   international travel to JFK. And it shows you

18   that in the first four months of this year nearly

19   10 million travelers traveled in and out of JFK

20   for the rest of the world. And it decomposes the

21   information for arrivals to the United States and

22   arrivals from foreigners -- foreigners coming to

1   the United States and U.S. citizens returning.

2   It also decomposes it by departures

3   from the United States, i.e. from JFK. And there

4   are foreigners who are returning, and there are

5   also U.S. citizens who are originating in JFK.

6   If instead you wanted to not look at

7   JFK but wanted to look at a -- not overseas, but

8   wanted to look at a particular airport overseas,

9   you can in this instance pick London Heathrow.

10   And so now it will show you, okay, this is --

11   this is the travel information during the first

12   four months of travel this year between JFK and

13   Heathrow.

14   If you want to look at periods of

15   time, and you want to look at maybe how we did

16   compared to the first four months of last year,

17   you can say, "I want to look at January,

18   February, March, and April," it will then give

19   you growth rates and show you visitor volume

20   between JFK and Heathrow for the first four

21   months of last year versus this year.

22   So this is an exciting tool that we

1 have been working on, and we have developed so

2 far eight data visualization monitors. And we

3 are planning on improving the ones that we have,

4 and we are planning on building a number more

5 over the next several years.

6   So with that, thank you very much.

7   MS. AGUINAGA: Thanks, Dave. And

8 thanks to the rest of the team.

9   So we do actually have a couple of

10 minutes for any questions. If you have a

11 question, just raise your hand or just speak up.

12   Yes. I see Fred.

13   MR. FELLEMAN: Yeah. Thank you very

14 much. At the IPW conference, I had a little

15 glance at this dashboard. And one of the things

16 I saw that wasn't there were trend data. You can

17 look at each year individually, but not how it

18 changes over time. Is that one of the ads that

19 you might include?

20   MR. HUETHER: Yes. I -- and I

21 basically look at this as a data user as well.

22 So our first step was doing -- using it for a

1   particular year. But if you wanted to, say, look

2   at the share of German travelers that go to

3   Charleston, South Carolina, who are business

4   travelers, and you wanted to look at that over

5   multiple years, that's the area we're headed in

6   as well. Yes.

7   MS. AGUINAGA: And Stephanie?

8   MS. JONES: Thank you. Thank you for

9   sharing, Dave.

10   I have a question about the area that

11   allows you to determine the types of activities

12   or the types of -- the purpose that people were

13   visiting. Is it possible to further develop

14   under types of activities to be able to collect

15   data that indicates what type of diverse

16   experiences or activities, because when you're --

17   when we're talking about the National Travel and

18   Tourism Strategy, you know, throughout it it's

19   specifically indicating being able to target

20   underrepresented communities and small-scale

21   businesses.

22   So is there a way to ask people what

1   type of diverse activities, who facilitated it?

2   Was it an African American? Was it LGBTQ?

3   Because how will we be able to measure, you know,

4   the impact of tourists on diverse and

5   marginalized communities if we don't know who is

6   actually visiting and having those types of

7   experiences.

8   MR. HUETHER: The answer is there is

9   always a way. So what we have to find out --

10   when we make changes to the Survey of

11   International Air Travelers -- last time we did a

12   major, significant change was 2012. And if we

13   make significant changes, then we have to go

14   through a fairly lengthy process to make sure

15   we're not creating an over -- we're not overly

16   burdening the survey respondents.

17   If the questions -- if the changes we

18   make are deemed to be not significant, then we

19   can do that much quicker. So it's something that

20   we should think about and find out, if we want to

21   expand that in this area, what will be the way to

22   do it?

1   So that's something that we can

2 investigate and come back to you on. So I think

3 it's a great idea.

4   MS. JONES: Thank you.

5   CHAIR HORNBUCKLE: Jennifer? Bill.

6 I guess maybe a question for Brian.

7   MS. AGUINAGA: Yes.

8   CHAIR HORNBUCKLE: How does this group

9 interact with your agency? How do you see that

10 happening?

11   MR. BEALL: The TTAP interacting with

12 the National Travel and Tourism Office?

13   CHAIR HORNBUCKLE: Yeah. Because,

14 obviously, right now the way it's set up to the

15 Advisory Board, we're advisory, but obviously you

16 guys do a lot. You do most of the list, it

17 sounds like.

18   MR. BEALL: No. I think -- you know,

19 I think it's a very unique way that we have --

20 the NTTO is set up, because not only do we get to

21 work with the TTAP and receive incredible

22 recommendations in the private sector to help

1   inform the work that we're doing, you know,

2   through Commerce's leadership role in travel and

3   tourism issues for the Federal Government, but

4   then we also have the Tourism Policy Council,

5   which is where we can bring the recommendations

6   to the interagency for consideration.

7   So I think, you know, it's just an

8   incredible model we have set up with the Travel

9   and Tourism Advisory Board and the TPC, and the

10 inputs that we receive from the TTAP are just so

11 helpful in all the work that we do to help

12 support the growth of the travel and tourism

13 industry, strengthen its competitiveness, and of

14 course, always our focus, increasing U.S. travel

15 and tourism exports.

16   CHAIR HORNBUCKLE: Thank you.

17   MS. AGUINAGA: Thanks, Brian.

18   Andrew?

19   MR. LEARY: Hey, Dave. Thanks for

20 running us through the in-bound traveler tool. I

21 think that it's really neat to see the

22 visualization. I was playing around with it, and

1   just a question for you. Is there a way to look

2   at the data in kind of a reverse sense?

3   So what I'm thinking about is, if I

4   was curious about in-bound traveler behavior to

5   American Indian communities, or those who are

6   seeking out national parks, is there a way to

7   select that, and then the output then ranks these

8   countries by order of response, for instance?

9   MR. HUETHER: The answer is not yet

10   through data visualization, but we -- we do have

11   -- do special runs of our data related to

12   national parks, American Indian communities. I

13   think shopping is another one. There are like

14   four special runs that we do. So we have the

15   data. We just have to incorporate it into these

16   data visualization monitors.

17   So the answer is, we don't have it yet

18   in data visualization, but we can do it. It's

19   just a matter of priority. And we will get there

20   over the next one to two years I think.

21   MR. LEARY: Thanks.

22   MS. AGUINAGA: Thanks, Andrew.

1   Stephanie, is yours something really

2   quickly? Otherwise, we have to move over to the

3   TTAP. Okay.

4   MS. JONES: Yeah. Just really quickly

5   adding onto Andrew's question. Just, again, be

6   intentional about making certain that other

7   communities beyond the Native Americans and the

8   national parks are included. That's all I wanted

9   to say.

10   MR. BEALL: And I just want to add one

11   thing. Thank you for the feedback on the

12   research tools. As Dave has mentioned, we are

13   continuing to build these out, and we really want

14   to make them, you know, user friendly and really

15   collecting the information that the industry

16   needs and is helpful to your work.

17   Jen, back to you.

18   MR. HANNEMANN: Jennifer, this is Mufi

19   Hannemann. I just want to say to Stephanie's

20   remarks, ditto, ditto, ditto.

21   MS. AGUINAGA: Okay. Thank you.

22   MR. HANNEMANN: Thank you.

1   MS. AGUINAGA: And definitely, if this

2   is a topic of interest, let's have more

3   discussions about it, whether it's through the

4   TTAP or in one-on-one conversations. You know,

5   it seems like data I think is always a popular

6   topic among us, so, again, we are happy to have

7   one-on-one briefings.

8   We can do a whole other -- we can do

9   a whole other session just on Dave demo-ing. He

10   loves to demo, so we could do that as well.

11   So thank you all. I hope this was at

12   least a little bit helpful, and hopefully we'll

13   continue the conversations.

14   Now we will move over to the TTAP

15   meeting, which, again, is a separate Teams link,

16   which I think, Christina, you can put in the

17   chat, or otherwise it should be on all of your

18   calendars. So I will see you all over there.

19   Okay. Thanks.

20   (Whereupon, the proceedings in the

21   above-entitled matter went off the

22   record at 10:55 a.m.)

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Before: DOC TTAB

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_____
Court Reporter