



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. DEPARTMENT OF COMMERCE

NTTO RESEARCH PROGRAM

UPDATE - TTRA

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Industry & Analysis

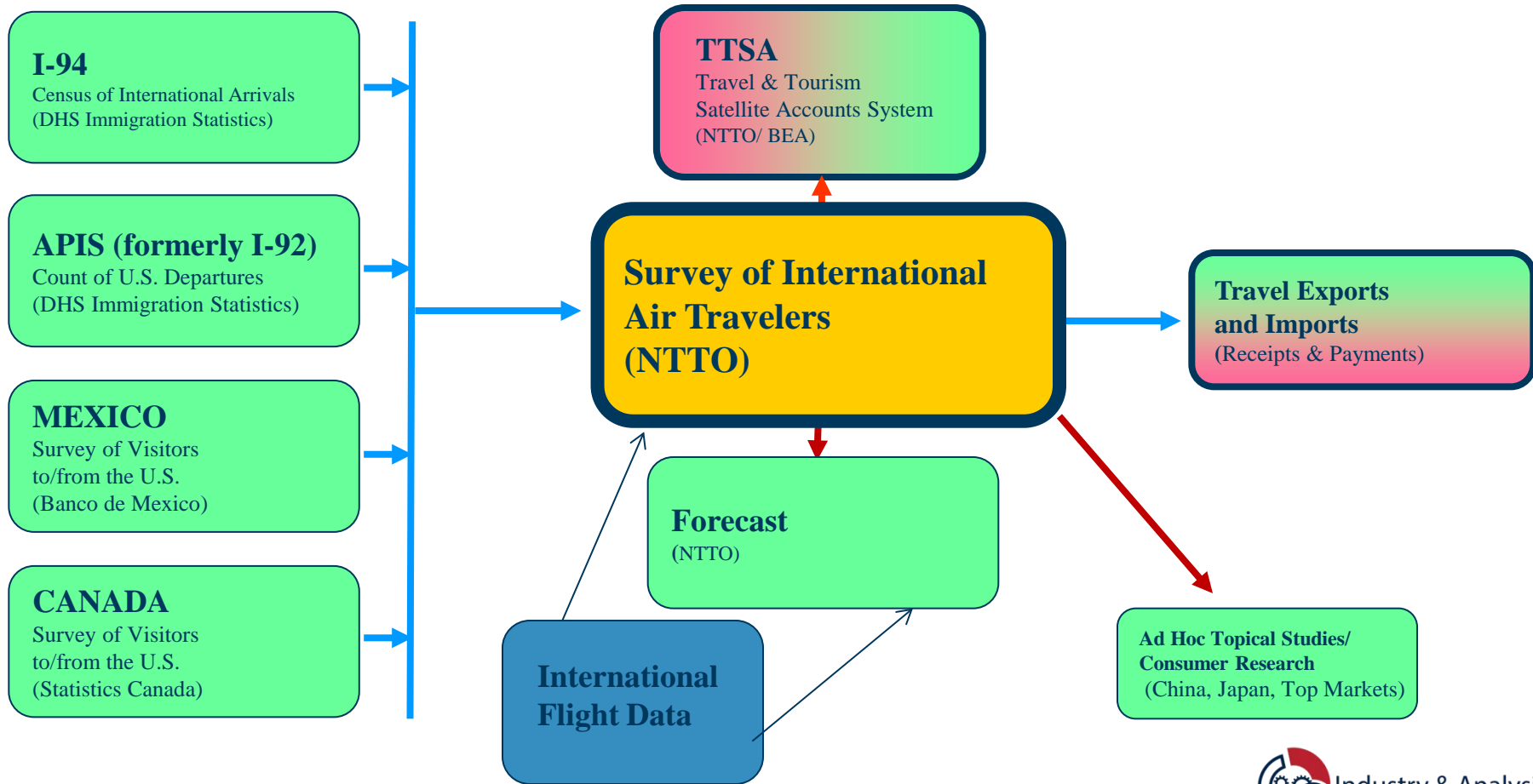
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The Government Mandates

- International Travel Act of 1961
- National Tourism Policy Act 1981
- United States National Tourism Organization Act of 1996
- **Travel Promotion Act of 2009**
- ITA Strategic Goals.....
- National Travel & Tourism Strategy in 2012

U.S. Integrated Statistical System for Measuring International Travel & Tourism





I-94 Arrival Record

- Monthly Department of Homeland Security (DHS) file of non-immigrant overseas travelers to U.S.
- Based upon Passport data and Visa, Electronic System for Travel Authorization and other DHS data bases to create a record of visitors.
- Non-U.S. Citizens arrival records processed while entering the country based upon residency. Provides a count of arrivals to the USA. (> 1day, less than 365)
- Includes: country of residency, citizenship, arrival port, first address in U.S., mode of transport to enter the USA, gender, age, processed for selected visa types (B, E, F, I, M, GB, GT, WB, WT) of the over 200 visa types available.



I-94 Automation Issues

- For the last 3+ years, it has caused a growing number of problems that hinder us from providing quality and timely international arrivals data
- DHS started the I-94 automation in 2013 and early on we had issues with transit passengers being counted as visitors and no way to track visits to one night or longer
- In 2014, the NTTD moved to more closely follow the UNWTO definition of one or more nights as data quality to track departures increased dramatically.
- In late 2014, and 2015 to present, problems started with the loss of country of residency for selected Visa Waiver Program countries due to Kiosks and other entry processing technology
- A COC = COR fix was developed for missing COR
- But, other problems also started to occur



I-94 Automation Issues (Con't)

Year	# of records missing COR	Lowest monthly share of missing records	Highest monthly share of missing records	Year end average share of missing COR records
2015	7,071,000	3.2% (Jan)	13.2% (Feb)	8.5%
2016	3,130,000 *	2.8% (Sept)	6.8% (June)	5.3% *

* 2016 collections only through September 2016

Other Data Quality Issues:

- Missing mode of transport data
- Late records for Guam & Saipan
- Issue of missing & unknown airport & country codes
- Systems improvements on the border caused multiple counts from residents of Canada who used foreign documents to enter USA
- Timeliness in getting monthly data files and files coming to us with wrong month, or control total does not match records reported
- APC & Mobile APPS not collecting COR temporarily
- Cross coding of countries – China/Hong Kong and Turkey & Turkmenistan
- Timeliness of response to monthly questions we find from data processing
- Time required to re-run, review, approve and release. Cost have increase 27% each year for last 2 years with no additional resources from ITA to pay for it
- Loss of confidence by industry in data and increased complaints from clients
- Impact on balance of trade data



APIS (I-92) International Air Traffic Statistics Program

- Monthly Department of Homeland Security (DHS) database of international air traffic to and from the U.S.
- Required from all airlines flying to and from the U.S.
- Reporting of air passengers based upon the Advance Passenger Information System's (APIS) data base from airline manifests
- Includes: number of passengers, flag of carrier, schedule or charter, U.S. citizen or non-citizen, country traffic, and airport traffic counts – U.S. & foreign airports
- Only source for U.S. citizen/resident international travel estimate of the number of total air travelers departing the country
- Although, U.S. estimates of outbound not as well controlled as the inbound data, automated in July 2010 and data quality and timeliness have improved until receipt of November 2016 air traffic file & January 2017 files
- Used to weight the U.S. outbound respondents collected from the Survey of International Air Travelers to enable the NTTO to report 30-40 countries visited by U.S. travelers going overseas



Comparison of I-94 to APIS

Differences between the APIS and I-94 records (after processing by NTTO/CIC):

	APIS	I-94
Record type	Flight (individual airline flights, a count of the number of passengers on a flight)	Passenger (individual records)
Origin & Destination (Arrivals)	From last foreign airport to first U.S. airport and country and regional summaries are available	From country of origin (residency) to U.S. port of entry; first intended state when indicated
Mode	Air only	Air, sea and land
Visa types	Immigrants Non-immigrants (all 200 visa types, both visitor (13) and non-visitors lumped together) with no way to pull out any subset by visa type. Also includes U.S. citizens, but they are identified.	Non-immigrant Visitors (13 specific visa types) The NTTO excludes the nearly 190 visa types that the UNWTO recommends not be counted as an international visitor
Country of Traveler	Citizenship	Residency
Correlation	All travelers	~80% of APIS alien air arrivals when compared to I-94 definition
Differences/Issues	Immigrants – volume change; Non-immigrant non-visitor volume changes (the 200+ less 13 visitor types) Missing flight records	Missing COR passenger records & in-fill with COC



Survey of International Air Travelers

English and 11
Foreign language versions

Self administered by
passenger

Same survey for non-resident
and resident travelers ...
Skip patterns



New Questionnaire
In 2012

Designed by
Government and the
Travel Industry

New NTTO Reports
Data on 37 to 40
Traveler
Characteristics

<http://travel.trade.gov/>



2006-2015 SIAT Program Samples

Year	Overseas to the USA	Mexican to the USA	Total Non-Resident Sample	% Change	U.S. Residents to Overseas	U.S. Residents to Mexico	Total U.S. Resident Sample	% Change	Total # of Respondents Per Year	% Change
2015	49,462	2,155	51,617	7%	39,970	5,406	45,376	10%	96,993	8%
2014	46,231	2,138	48,369	17%	35,999	5,071	41,070	19%	89,439	18%
2013	39,309	1,963	41,272	-5%	30,372	4,058	34,430	-6%	75,702	-5%
2012	41,827	1,544	43,371	8%	33,246	3,398	36,644	-2%	80,015	3%
2011	38,423	1,699	40,122	5%	34,452	3,007	37,459	-2%	77,581	2%
2010	36,497	1,616	38,113	0%	34,931	3,218	38,149	-6%	76,262	-3%
2009	36,597	1,447	38,044	3%	36,597	3,944	40,541	11%	78,585	7%
2008	35,909	1,191	37,100	4%	33,299	3,114	36,413	-6%	73,513	-1%
2007	34,470	1,274	35,744	37%	34,626	4,213	38,839	8%	74,583	20%
2006	25,038	1,048	26,086	-7%	30,769	5,194	35,963	17%	62,049	5%



Quality Control Checks of the Inbound Data

- The Overseas Data goes through numerous quality control checks before it is released.
 - We match the sample collected to the I-94 country of residency counts weighted and unweighted
 - We match the port of entry data sample to the I-94 counts by port weighted and unweighted
 - Region, state and city sample are compared to the unweighted and weighted sample
 - Each questions response rate is tracked
 - The main destination visited is compared to the I-94 address while in the USA
 - The results of the survey responses are checked for consistency within the data reported



Unique Features of SIAT Data

- The NTTO not only provides visitation estimates, market share and rates of change over the previous years that are comparable by region, country, destinations and sectors.
- But, more importantly, the visitation estimates can be explained to show why visits are up or down based upon the data collected
- Shifts in the mix of ports of entry for the destination
- Shifts in the share of travelers who entered your major port of entry, but did or did not visit your destination.
- Shifts in purpose of trip, frequency of visit, package/independent travelers
- Shifts in the types of transport used or the number of destinations visited or number of nights of their visit from year to year.
- Shifts in the activities can also impact visitation
- The NTTO survey program is the ONLY research program in that can provide this level of detail on why your visitation figures changed, no other source can do this.



NTTO Efforts to Find Alternative Collection Method

Methodology changes in data collection

Goal: Increase collections, lower unit cost

- **2008:** Several airlines and industry booking engines tested
- **2012:** An invitation card, containing a URL, was handed out to passengers in the boarding area and the lounge
- **2014:** An invitation card, containing a URL, was handed out to passengers in the boarding area. Respondents were asked to access the URL either during pre-departure in the gate area, or while on-board the flight, or once having arrived at their destination.
- **2015** The E-SIAT tablet test.



FY2017 & Beyond: Other Alternative Methods

- Beacon technology.. Emit 'APP' to passenger PED in gate area./Wi-Fi
- Develop a pro and con for all possible alternative methods, like.....
- Hand-Held Devices at Departure Gates?
- ESTA and/or DA.com Survey test?
- Expansion of SASP? Make further revisions to airport departure survey methodology?
- Internet Panel tests? E-Mail Surveys? Pop-Up Surveys?
- Payment data (credit cards)?
- Combine Multiple Years of Data & Release Nationally or Others methods?
- Review current SIAT Method to find ways to reduce costs, increase sample, conduct more effective sampling by looking at others who conduct similar surveys?
- Conduct tests of most promising methods , analyze the results and develop a recommendation for best method?
- Work with Mexico Tourism/Banco and add destination visited to their survey & obtain USA clients to fund it?



Travel & Tourism Advisory Board

- Commerce's Travel & Tourism Advisory Board has for years been supportive of the research conducted by the NTTO and has spent considerable time trying to bolster the SIAT
- At the June 5, 2017 Board Meeting the SIAT was extensively discussed and supported in reports to senior Commerce staff.
- Several Industry firms either wrote and/or provided verbal support of the program as well.
- Work will continue through the Board to educate the key Commerce staff on this program's utility.



Additional TPA Requirements

OFFICE OF TRAVEL & TOURISM INDUSTRIES SHALL:

- Expand access to the official Mexican travel surveys data
- “Expand the number of inbound air travelers sampled by the Survey of International Travelers to reach a 1 percent sample size, revise the questionnaire (done), improve response rates to at least double the number of States and cities with reliable international visitor estimates and improve market coverage”
- Develop estimates of international travel exports (expenditures) on a state-by-state basis
- Evaluate the success of the Corporation in achieving its objectives





Summary of Expanding the 2016 SIAT Sample 2-5 times (Overseas Sample which excludes Canada & Mexico & U.S. outbound)

Sample Collected >400	Current	\$ 5 million*	3 times	4 Times	5 Times
Country sample	23	43 or 0	49	55	60
State/Territories sample	24	31 or 0	36	42	43
Cities	25	46 or 0	58	70	81
Overseas sample	46,615	89,100 or 0	139,845	186,460	233,075

* Note: The FY2018 ITA budget calls for a \$2 million cut of the SIAT budget, but asks for a \$5 million budget for the program. If Congress does not approve the increase we could have no survey. To develop the estimates, we used the 2016 overseas sample shares and projected the sample collections using the share of sample projected by increasing the sample 2-5 times its current level.

Note: The NTTD would recommend a focus upon top countries being over sampled, and a cap of collections of a few select top states/cities, adding new airports to survey from, and over sampling of small destinations and ports.



Canadian Data Program

- In April/May, the NTTO worked with Statistics Canada to ensure state visited data will be collected in 2018
- On May 25-26, 2017, the NTTO met with Statistics Canada & the Mexican Tourism Office research staff to discuss additional cooperation and share best practices among our countries
- The procurement of the 2015-2018 Canadian data is in progress with bids due June 21st
- NTTO plans to work with Statistics Canada & the industry to form a working group to investigate keeping the state visited and possibly adding city visited data
- Interested?



Mexico Data Program?

- In September 2016, the NTTTO staff met with the Mexico Tourism Office and Banco de Mexico
- An exchange of research data between our countries was conducted
- The NTTTO learned Banco de Mexico surveys 190,000 Mexican travelers to and from the USA yearly collecting selected traveler characteristics of the visitors.
- But, they do not ask the destinations visited by Mexican travelers to the USA.
- Banco did state they would consider adding this piece of information in the future.
- Are there destinations who would be interested in working with the NTTTO to fund this addition to obtain better Mexico data?



NTTO Data Release Summary

- Preliminary 2016 travel exports time lines & top 10 export market data have been posted to the site. The NTTO has released January to April 2017 total travel spending totals on the site.
- In late June BEA will issued revised 2014-2016 spending data. The NTTO will update the files on line with this new data.
- The 2016 I-94 data released to date is through September 2016, with October data to be released shortly. Annual 2016 I-94 arrivals in July 2016. The NTTO has posted a Q&A that address the issues we have had processing the 2014-2016 I-94 data on the monthly pages.
- January to April 2017 I-94 arrivals will be released as it can be processed.
- 2016 APIS data has been released through November, but a revision is in the works. 2017 data for January to April has been received but there are problems with January 2017 that are also being fixed. As possible, the NTTO will release this data.
- 2016 SIAT data: The NTTO has processed the third quarter data and is waiting for the 4th quarter I-94 arrivals. Once received, the NTTO staff will work to issue the annual 2016 SIAT data, most likely in late August/September 2017. The 20+ country profiles, 11 regional profiles, 5 sector profiles and overseas visits to states and cities estimates will be released at this time.
- 2015 Canada data is being procured. Once obtained, the NTTO will release this data. For 2016, when available (Sept. 2017), the NTTO will purchase this data and work to release it.
- TTSA Annual 2016 TTSA results were issued in March and 1st quarter 2017 will be released in June 2017.
- Forecast: In June 2017 forecast drivers for the top 21 countries were posted to the NTTO site. In October 2017, the NTTO hopes to issue a new 2017-2022 forecast.
- FRN on 2017 Fees for NTTO Research & Information on 2017 SIAT sample
- Request for Information (RFI) for International Data Collection issued this summer



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- Forecast of international travelers to the U.S. through 2021
- Information on NTTO's nine on-going market analysis (research) programs
- Updated monthly statistics on arrivals and departures
- Late-breaking TI News announcements and information releases
- Links and information on Commerce's Commercial Service Travel & Tourism Team in the USA & Abroad
- Links to other relevant organizations in the travel and tourism industry

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