

Survey of International Air Travelers **Overview for** **Pre-Proposal Conference**



Presented by:

Richard Champley / Ron Erdmann

Office of Travel and Tourism Industries

International Trade Administration

U.S. Department of Commerce

March 23, 2006



Agenda for Today

- Introductions and Ground Rules

Joel Perloth, Contracting Officer, NOAA

- Overview of OTTI

Richard Champley, Senior Analyst, OTTI

- How the Survey of International Air Travelers Serves its Stakeholders

- Procurement Issues

- Q & A on the Solicitation



U.S. Department of Commerce



Includes

NOAA / Nat'l Weather Service

Bureau of Economic Analysis

Census Bureau

Patents & Trademarks

International Trade Admin.

***OTTI**



International Trade Administration (ITA) Strategic Business Units



Market Access & Compliance
Import Administration
U.S. Foreign Commercial Service
Manufacturing and Services
Services
OTTI



Mandate

- United States National Tourism Organization Act of 1996 (Public Law 104-288, Oct. 11, 1996)
- Bureau of Economic Analysis (BEA) – Congressional mandates



Office Of Travel & Tourism Industries

OTTI MISSION STATEMENT

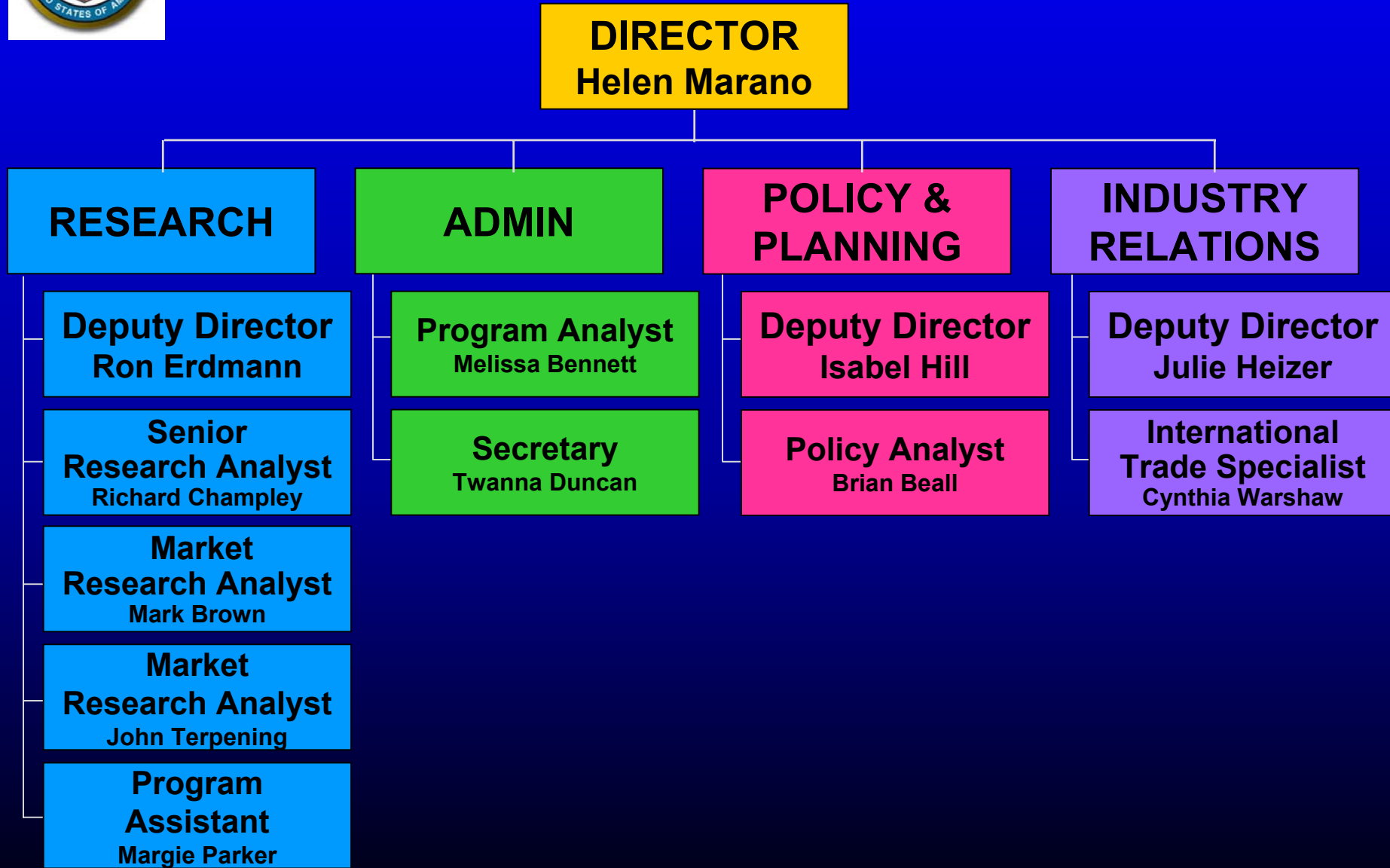
Tourism Industries is dedicated to helping U.S. businesses gain access to and compete in the global marketplace.

OTTI GOAL

To assist travel and tourism businesses by advancing policies and programs that strengthen economic development and export opportunities.

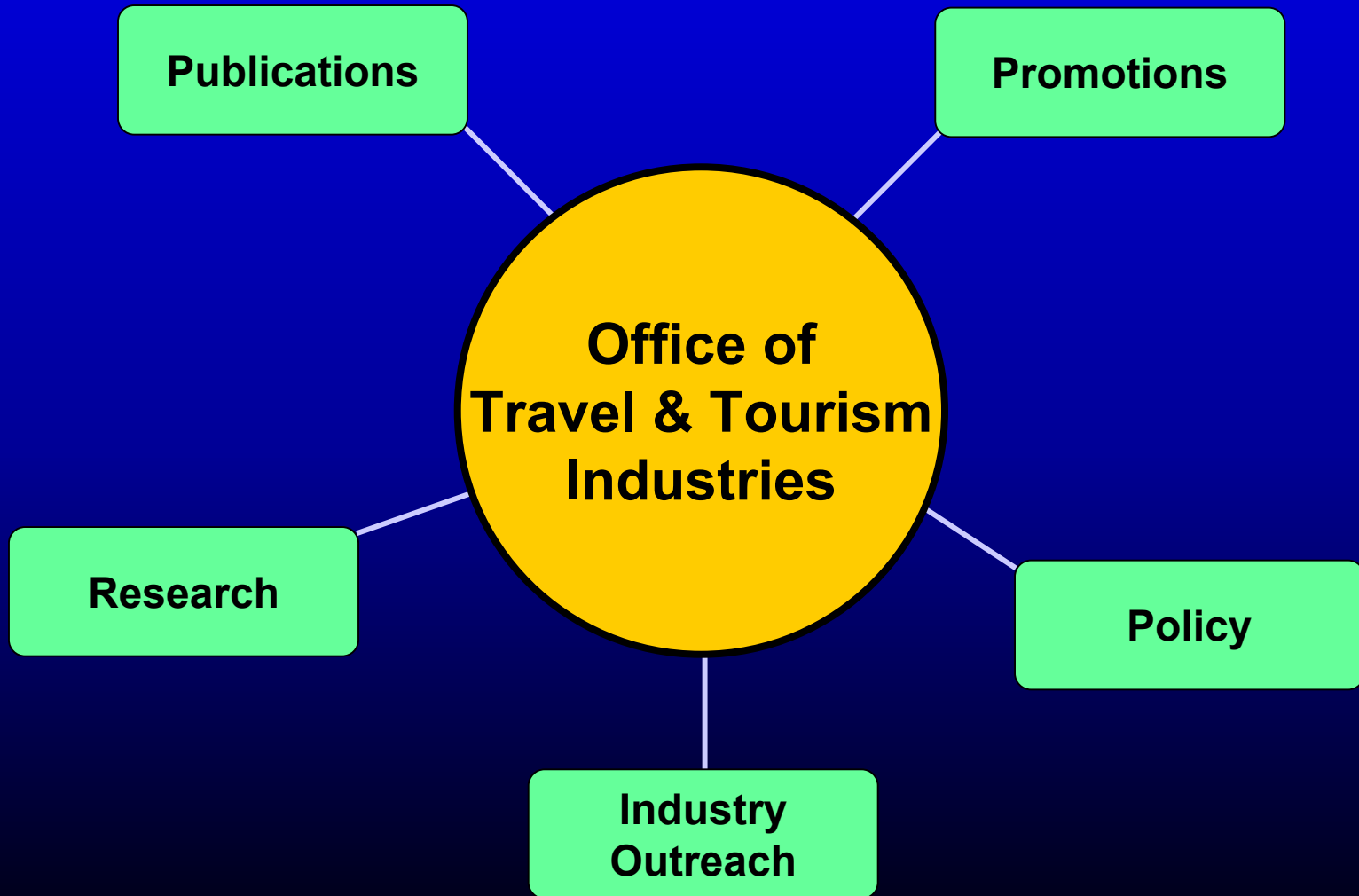


Organization Chart





What We Do at OTTI...

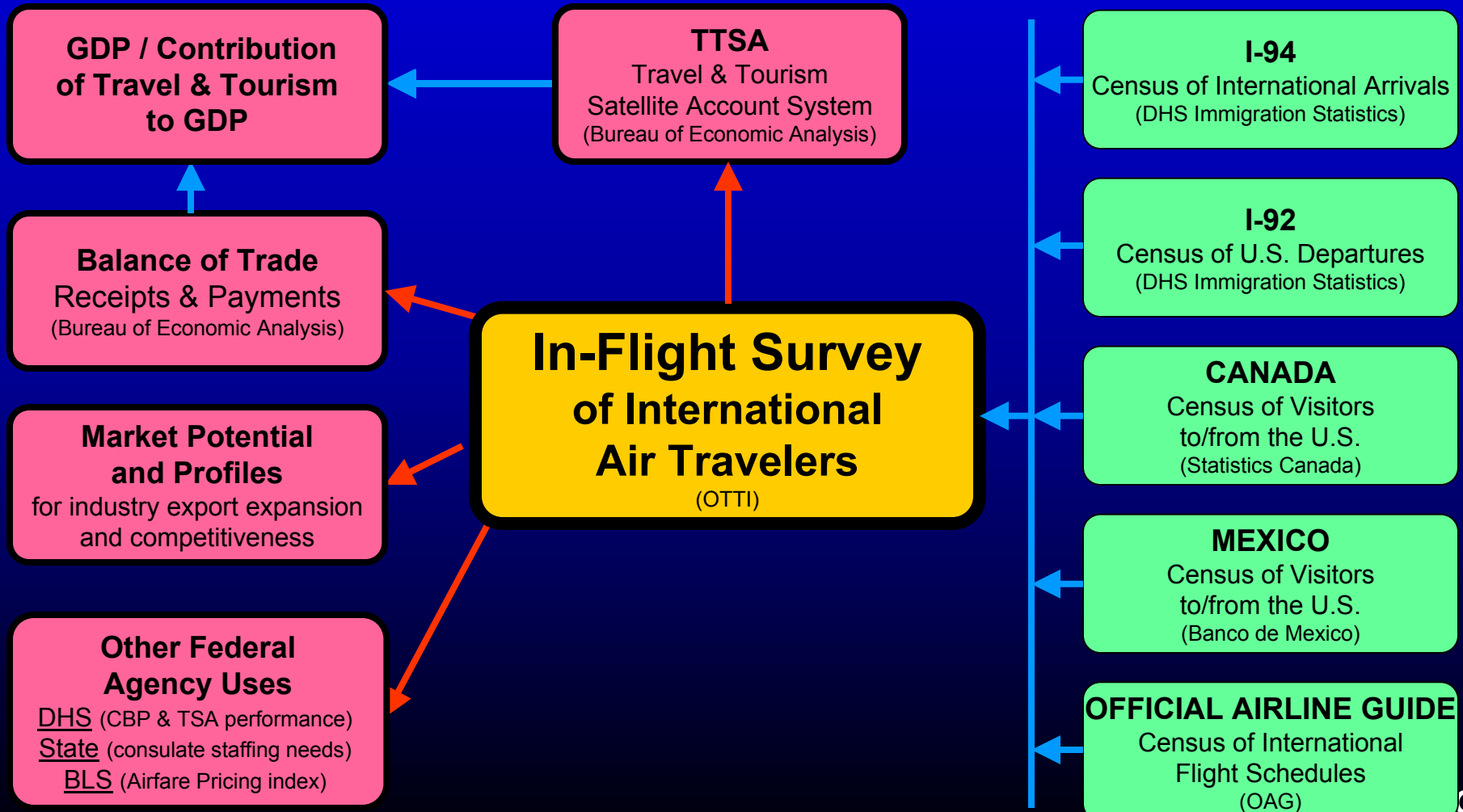




U.S. Integrated Statistical System for Measuring International Travel & Tourism

Deliverables

Inputs





OTTI Publications

U.S. DEPARTMENT OF COMMERCE
INTERNATIONAL TRADE ADMINISTRATION
Tourism Industries

SURVEY OF INTERNATIONAL AIR TRAVELERS

DEPARTING THE UNITED STATES

Dear International Traveler:

Please help the travel industry improve the services they offer you. The information collected in this survey is used by airlines, travel agents, hotels, government travel offices, and other travel providers and providers to understand you, the international traveler, and thereby take steps to help improve your next international trip.

This questionnaire is designed to be completed by both non-U.S. residents who have visited the country and U.S. residents traveling abroad. If you are 18 years of age or older, please complete the survey survey. **ONLY ONE RESPONSE PER FAMILY GROUP PLEASE.**

Upon completing this survey, please return it to the person who provided it to you. The estimated average time to complete this questionnaire is 15 minutes. Should you have any comments regarding this survey, please send them to the Tourism Industries, ITA, Washington, DC 20230, or the Office of Information and Regulatory Affairs, OMB, Project 9025-0027, Washington, DC 20503.

Thank you for your cooperation on this important survey.

OMB No. 3045-0027 (Rev. 2004)

UNITED STATES DEPARTMENT OF COMMERCE
International Trade Administration

IN-FLIGHT SURVEY

of International Air Travelers

DEVELOPED, ADMINISTERED & SPONSORED BY:
UNITED STATES DEPARTMENT OF COMMERCE
International Trade Administration
Office of Travel and Tourism Industries
Washington, D.C. 20230

CONTRACTED TO:
CIC RESEARCH, INC.
San Diego, CA 92111

Overseas Travelers to the United States
January - December 2004

U.S. DEPARTMENT OF COMMERCE
International Trade Administration

IN-FLIGHT SURVEY

of International Air Travelers

U.S. Travelers to Overseas Countries
January - December 2004

SHOPPING AND CULTURAL/HERITAGE TOURISM

A Special Study of International Travelers to the United States

U.S. Department of Commerce
International Trade Administration
Office of Travel & Tourism Industries
14th & Constitution Avenue, NW, Room 7025
Washington, D.C. 20230
www.ittat.gov

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Analyse performed by Texas A&M University
Department of Recreation, Park & Tourism Sciences
College Station, TX 77942-2281

December 2004

TOURISM: Putting the Pieces Together

THE TOURISM POLICY COUNCIL
In Conjunction with the National Performance Review

Summary of International Travel to the United States

December 2004 AND YEAR TO DATE

U.S. DEPARTMENT OF COMMERCE
International Trade Administration
Office of Travel and Tourism Industries
Website: <http://ittat.dtic.gov>

U.S. International Air Travel Statistics Report

Calendar Year 2004

U.S. DEPARTMENT OF COMMERCE
International Trade Administration
Office of Travel and Tourism Industries



Key Facts About *Survey of International Air Travelers*

- Since 1983, a primary research tool
- 60+ participating airlines, both U.S. and foreign flag
- Customer focus, within entire U.S. – overseas market
- 2 populations (non-resident inbound & U.S. outbound)
- Random selection of flights (clusters), departing U.S.
- Questionnaire (12 languages) self administered
- On-board (in-flight) or in airport gate area
- Sample size ~ 0.14% of population
- True origin – destination(s)
- Ubiquitous



Information from the Survey of International Travelers

- **Basics**
 - Visitor volume by country of residence
 - Country of citizenship
 - Airline/airport/customs details
 - Safety issues
- **Planning & Booking**
 - Information sources
 - Advance trip decision / airline reservation
 - Airline / lodging booking sources
 - Use of package / package elements / timing
- **Trip Characteristics**
 - First U.S. International trip
 - U.S. Trips in last 12 months
 - Purpose of trip--main, secondary
 - Destinations--states, cities
 - Time of year
 - Transportation used in U.S.
 - Leisure activities in the U.S. (25)
 - Trip length--total, in U.S., each destination
 - Accommodation (each U.S. destination)
 - Spending--total, itemized, payment method
- **Travel Party Characteristics**
 - Travel companions
 - Party size--adults, children
 - Gender & age of respondent
 - Annual household income
 - Occupation of respondent
- **Branded Data**
 - Airline
 - Airport--board, connect, depart
 - Destination (cities, states, attractions)
 - Hotel (by destination)
 - Payment brand--credit card, travelers checks, debit
 - Car rental
- **Ratings Data**
 - Airline--overall, 17 attributes
 - Airline attribute importance
 - Airport--overall, 10 attributes
 - Ins/customs experience--5 attributes



OTTI Uses of Survey Data

- Provide data to U.S DOC for policy formulation
- Assist Commerce Travel & Tourism Team
- Consult with Industry Clients
- Prepare Reports for Public Use (i.e., website) and Client Use (National and Custom reports sold)
- Conference presentations
- Media responses
- General requests from educational, non-profit organizations
- Provide data to other users



Government Uses of the Survey of International Air Travelers

- Bureau of Economic Analysis (BEA)
% of GDP / Balance of Trade / Travel & Tourism Satellite Accounts
- Department of Labor (BLS)
Air Ticket Price Index
- Department of Transportation (DOT)
International Transportation and Travel Trends
- Department of Homeland Security (DHS)
TSA / CBP staffing evaluations (proposed)
- Department of State
International Air Service Agreements (ie. Open Skies)



BEA Use of OTTI Statistical Data

- Travel and Passenger Fare Exports & Imports
 - Monthly Total Estimates
 - Quarterly for Select Markets
 - Annual for World Regions over 30 Specified Countries
- Travel & Tourism Satellite Accounts
 - Annual and Quarterly



Other Public/Private Uses of IFS

- Destination Marketing Organizations
 - Convention & Visitors Bureaus
 - State Tourism Offices
 - National Tourism Offices
- Airline Planning (Marketing, Route Planning, et al)
- Airports
- Non-Profit Travel and Tourism Organizations
- Consultancies
- Educational Institutions



U.S. Travel & Tourism Balance of Trade by Country (2004)

Origin Country	Total Travel Receipts 2004r (\$mil)	Total Travel Payments 2004r (\$mil)	2004 Trade Balance (\$mil)	2004/2003 % Chg. (%)
Japan	\$13,094	\$3,377	\$9,717	44%
Canada	\$10,436	\$7,620	\$2,816	29%
United Kingdom	\$12,655	\$9,855	\$2,800	53%
Venezuela	\$1,324	\$294	\$1,030	5%
Australia	\$2,554	\$1,846	\$708	449%
Belgium-Lux	\$851	\$251	\$600	29%
Germany	\$4,687	\$4,501	\$186	n.a.
Netherlands	\$1,550	\$1,503	\$47	-59%
South Africa	\$283	\$653	(\$370)	10%
Italy	\$1,786	\$3,326	(\$1,540)	11%
France	\$2,668	\$4,430	(\$1,762)	31%
Mexico	\$7,624	\$10,177	(\$2,553)	14%
Other	\$11,159	\$16,443	(\$5,284)	170%
Grand Total	\$93,339	\$89,336	\$4,003	144%

r = The spending figures have been revised from the preliminary estimates released in April 2004



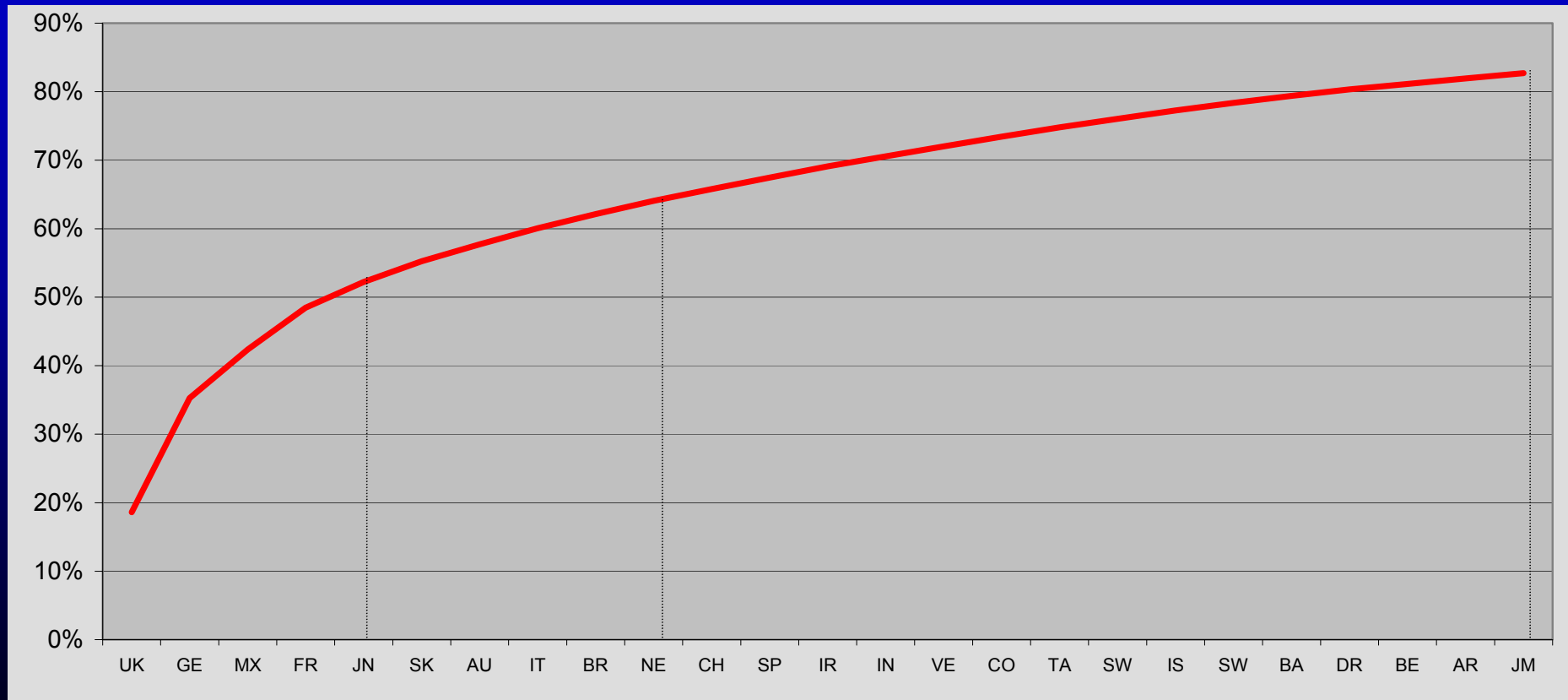
Top Arrival Markets in U.S. and Destinations Visited by U.S. Travelers Abroad

	IN	OUT		IN	OUT
UK	4.3	3.7	IT	0.5	1.9
JPN	3.7	1.1	CHI	0.4	1.1
MEX	1.7	5.2	NETH	0.4	0.9
GER	1.3	1.7	BRA	0.4	0.6
FR	0.8	2.4	JAM	0.2	1.2
SK	0.6	0.6	BAH	0.2	1.0
AUS	0.5	0.6	DR	0.2	0.9



Top 25 U.S. IFS Visitor Origin Markets (2005)

U.S. IFS visitor origin markets is concentrated in a few markets: the top 5 countries supply 52% of U.S. visitors...the top 10 supply 64%...and the top 25 supply 83% of all U.S. visitors (excluding Canada and land-based Mexico)





Top U.S. Ports (Inbound) v.s. Destinations

Ports

- JFK
- MIA
- LAX
- HNL
- EWR
- ORD
- SFO
- GUM
- ATL
- IAD

Destinations

- NYC
- Los Angeles
- Miami
- Orlando
- Honolulu
- San Francisco
- Las Vegas
- Washington, DC
- Chicago
- Boston



Procurement Document Q&A

- Section B, Contract Type and Value
- Section C, Statement of Work
 - p.10 Objective, Scope
 - p.13 Government furnished property
 - p.13 A. Population
 - p.14 B. Sampling
 - C. Questionnaire
 - p.16 D. Field Administration



Procurement Document

Section C, Statement of Work (continued)

-p.16 E. Data Entry, Weighting

-p.17 Processing: IT

Data Output

-p.19 Base Program

Indefinite Quantity, Indefinite Delivery



The Quickest Way to U.S. International Tourism Information:

<http://tinet.ita.doc.gov>

Includes International Travel Research Online

Order, read, download & print the latest statistics on international travel to and from the U.S.

- Updates on Year 2 of the **U.S. Promotion Campaign** in the UK & Japan
- All of the latest summary tables highlighting specific tourism trends
- Over 30 plus market and regional profiles available
- Forecast of international travelers to the U.S. through 2008
- Information on OTTI's nine on-going market analysis (research) programs
- Updated monthly statistics on arrivals and departures
- Export assistance and outreach programs
- Late-breaking TI News announcements and information releases
- Links and information on the Commerce, Commercial Service Travel & Tourism Team in the USA & Abroad
- Links to other organizations in the travel industry

Sign up for **TINews**, OTTI's FREE news service, for the latest in tourism industry news and program updates



Thank You!

Please direct questions and
correspondence to:

Lauren.Kunze@noaa.gov