

## UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

June 3, 2024

The Honorable Gina Raimondo  
Secretary of Commerce  
Washington, DC 20230

Dear Secretary Raimondo:

On behalf of the Travel and Tourism Advisory Board, thank you for the opportunity to provide recommendations to improve the collection and dissemination of travel and tourism data to support industry decision-making.

The National Travel and Tourism Office (NTTO) is a critical source of international visitor information for both public and private stakeholders in our industry. The data NTTO provides should be the foundation upon which strategic decisions are built, and we applaud the department's continual efforts to improve its data programs.

Current NTTO methodologies are designed to provide robust national-level statistics, but are not able to provide reliably accurate data for the state and city levels. This lack of local international visitor data creates an enormous challenge for destination marketing organizations – particularly those that do not have a gateway airport – greatly limiting their ability to understand their international visitation, let alone plan effective campaigns to stimulate growth. Similarly, it is difficult for private sector businesses to evaluate their destination-focused efforts and the market potential for products and services (e.g., tours and experiences).

Finding solutions for the gaps in local data therefore directly contributes to our industry's long-term objectives of counteracting overtourism and supporting smaller communities. We offer the following recommendations to enhance the depth, relevance and accuracy of NTTO's travel and tourism data programs.

The current methodology of gathering paper survey responses through the Survey of International Travelers (SIAT) from visitors as they depart from the U.S. is fundamentally limiting and costly. While the program is essential and effective in its primary objective of delivering national-level data, its scale is insufficient for use beyond the top few gateway destinations. We suggest exploring additional potential funding sources, such as private-public partnerships, to share costs of collecting such data. We also encourage further engagement by the private sector to increase funding specific to these data collection methods.

## **Recommendation #1: Establish data collection methods beyond the Survey of International Air Travelers (SIAT)**

We recommend that NTTO seek opportunities to leverage existing points of contact with visitors to gather data at a far greater scale to provide more accurate local data.

- I-94 – The most accurate way to collect destination visitation data would be to adjust the I-94 form that visitors must complete upon entry (typically via kiosk). The current form asks for the visitor’s first intended address. We recommend the Department of Commerce work with the Department of Homeland Security to adjust the I-94 form to better capture and manage traveler information to better understand traveler behavior and spend. We recommend capturing additional cities the traveler intends to visit on their trip. Additionally, we recommend considering capturing information related to the traveler’s:
  - Purpose of travel (business, leisure, etc.)
  - Expected spend
  - Mode of domestic travel (plane, train, car, etc.)
- Electronic System for Travel Authorization (ESTA) – Though the program is only applicable to visitors from Visa Waiver Program (VWP) countries, these countries represent a large portion of overall visitation. We recommend the web-based application form be adjusted to include the cities the visitor intends to visit on their trip.
- Lodging data – While the Department of Transportation collects and provides air passenger data, there is no national source of lodging data. Many other countries, as well as the European Union, base their international visitor statistics on data collected from lodging providers. We recommend that NTTO work with hotel, short-term rental companies and lodging data providers to explore the collection and dissemination of lodging data to further enhance the accuracy and relevance of international visitor data.
- Credit card data – Credit card companies have long offered data products that summarize visitor spending into merchant categories. They do not currently offer this data by merchant size, however. Obtaining visitor spend by merchant size (e.g., businesses that receive <\$100,000 in sales per year) would enable the industry to quantify its direct impact on small businesses and empower efforts to uplift communities of diverse-owned businesses in an unprecedented way.

## **Recommendation #2: Update the Survey of International Travelers (SIAT)**

While SIAT is limited in its ability to provide local destination-level data, it is a vitally important source for overall national data. We recommend the following updates to improve the program:

- Digital collection format – We recommend the use of QR codes and a web-based survey tool, which would be more efficient than the current paper-based fielding approach for both the user and the research vendor. Providing a small, immediately redeemable incentive for completing the survey would further improve the response volume.
- Survey Questionnaire – Please refer to the Appendix for specific recommendations for adjustments to the survey questions.

- Reporting/Analysis – The relatively recent addition of a data visualization tool for SIAT on NTTO’s website is a welcomed and helpful resource for users to get specific information from the large data set. In addition to making the data downloadable, we recommend the creation of additional analytical capability for segments (e.g., road trippers, families traveling with children under 13, repeat visitors).

**Recommendation #3: Provide expanded reporting for additional existing travel and tourism government data**

As convener of the Tourism Policy Council, we recommend NTTO act as a central data hub for government data that would help the travel and tourism industry have more granular insights into international markets and travel patterns, such as the following:

- ESTA – applications and approvals by country, by month
- Visa applications – renewal vs. new, by category, by country
- I-94
  - Analysis at passport number level to understand repeat visitation patterns
    - Percentage of passport holders who visited more than once by country, by year
    - Percentage of passport holders who arrived in more than one port of entry by country, by year
    - Percentage of passport holders who left from more than one port of departure by country, by year
  - Average number of days between entry and departure, by country, by month.

Accurate information is an essential prerequisite for effective strategy. Through the enhancements recommended above, NTTO has the opportunity to vastly improve the quality and breadth of data it provides and ultimately empower better business decisions for our industry.

Respectfully Submitted,



Bill Hornbuckle  
Chair



Brad Dean  
Vice Chair

## APPENDIX

The committee recommends NTTO consider these adjustments to the SIAT questionnaire:

### Additions

- Use of visa types and evaluation of visa process
- Need for accessible options within travel party (list categories of accessibility needs rather than disabilities) and evaluation of their availability
- General destination evaluation
  - Congestion/crowdedness
  - Access to diverse local culture
  - Value for money spent
  - Uniqueness of experiences
  - Sustainability
  - Cleanliness
  - Security/safety
  - Friendliness

### Edits/Cuts

- Update 6a (information sources)
  - Include
    - Lodging/vacation home rental providers
    - Social media/influencers
    - Travel TV/streaming shows
    - Travel review websites (e.g., TripAdvisor)
    - AI platform (e.g., ChatGPT)
  - Remove
    - Media types
- Condense 9 & 12 (air and hotel booking channel), cut 10-11 (advance booking and insurance)
- 17 remove brand, change checkbox for hotel, adjust private home to home rental
- 18c (time of booking) cut
- 20 (payment types) cut
- 23 –27, 28-1d3 cut
- 29b change to net promoter question
- 30b change to past 5 years
- 31c add nonbinary/other