



UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

June 28, 2017

The Honorable Wilbur Ross
Secretary of Commerce
Washington, D.C. 20230

Dear Mr. Secretary:

We were pleased to receive your thoughts and request for input at the March 31, 2017 meeting of the Travel and Tourism Advisory Board (TTAB).

You asked for recommendations that would help confer a competitive advantage to U.S. tourism interests, specifically in the following three categories discussed below: I. International travel and tourism; II. Global competitiveness; and III. Public-private partnerships that foster a welcoming destination.

I. International Travel and Tourism

You expressed some concern that the industry was revising a forecast relating to a goal that had been set by the prior Administration to achieve 100 million international visitors and \$250 billion in annual spend by 2021. With \$246 billion spent by international visitors in 2016 according to data from the National Travel and Tourism Office and the Bureau of Economic Analysis (BEA), we have essentially met the spending goal, even while lagging in the overall visitation number, when factoring in changes in BEA definitions. This dichotomy is a direct result of a variety of factors including global political and economic trends, currency exchange rates and a changing mix of visitors and markets traveling to America.

We reviewed the current National Travel and Tourism Strategy and determined that the five strategic elements remain relevant. Using this framework and having achieved the critical visitor spend component of the prior goal, the TTAB recommends the creation of a new 10-year National Travel and Tourism Strategy with an aggressive goal focused squarely on the growth of annual spending of international visitors to the U.S.

The recommended focus on spending is not done to the detriment of tracking visitor volume, but instead recognizes the economic reality that spending drives the economy and creates jobs. Setting an aggressive goal focused on spending also brings America's unit of measuring success

in line with the International Monetary Fund, and is consistent with the means whereby the U.S. government tracks the export value of all other products and services.

Establish a Task Force to Recommend a Numerical Goal

We recommend you adopt a 10-year strategy and direct the TTAB to provide a recommendation on the goal of total visitor spend to be achieved over the 10-year time period. This work could be accomplished through a TTAB task force that draws upon research expertise of TTAB members, along with inputs from travel and tourism organizations across the industry. With your approval, the TTAB will form this task force immediately.

II. Global Competitiveness

Additionally, you requested a list of four or five priority issues that the U.S. Department of Commerce could address to support the global competitiveness of the travel and tourism industry. We have outlined five ideas for your consideration, discussed below: market the welcome; support Brand USA; support the Survey of International Air Travelers; engage foreign governments in bilateral security agreements; and support infrastructure investments.

Market the Welcome

We believe it would be tremendously beneficial for the Administration to deliver a clear, pervasive message that reassures global travelers that the United States aspires to remain the most secure nation in the world and welcomes all travelers that pose no threat to our nation. We thank you, Secretary Ross, for extending this message to travelers to the United States at IPW 2017, and supporting the travel and tourism industry.

As you have demonstrated, enhancing national security and growing international visitation are not mutually exclusive. It would be tremendously impactful if a message of welcome were interwoven into the rollout of any new policies impacting travel. Specifically, the Administration should utilize interactions with foreign governments to reiterate that the U.S. remains open for business and is focused on creating a secure and welcoming travel experience for international visitors.

Support Brand USA

We encourage you to use your role with the Tourism Policy Council to ensure other government agencies are enhancing national promotion by utilizing Brand USA's messaging, media assets and promotional tools throughout their interactions with global travelers.

Brand USA is a highly effective public-private partnership that influences global travel decisions and drives demand for the U.S. We encourage you to support Brand USA's marketing efforts and their new inbound tourism campaign "See How Far You Can Go." Additionally, it will be important to work with Brand USA to develop a clear education message to provide precise communication regarding recent travel policy changes and U.S. entry policies to international visitors.

Support the Survey of International Air Travelers

The Survey of International Air Travelers should be continued and provided dedicated funding to ensure that the impact of international travelers on our nation's economy can be measured. This survey measures the impact of Brand USA in attracting visitors and the impact of international travelers on our nation's economy and should be maintained in its current form.

Engage Foreign Governments in Support of Bilateral Security Agreements

Through the Tourism Policy Council, we encourage you to communicate the value of bilateral security agreements and existing security frameworks to foreign governments and provide guidance in correcting any shortcomings. It is important to preserve and strengthen the Visa Waiver Program (VWP) by developing a plan to help the Administration evaluate and ensure that all countries are compliant.

The VWP data sharing requirements are robust and transcend the sharing that happens between the U.S. and non-visa waiver partners. Opportunities to change the name of VWP to better reflect the enhanced security coordination that is its purpose should be explored.

The Tourism Policy Council plays an important role in developing a plan to bring non-compliant countries into compliance without "turning off" travel. Exploring the concept of a Global Trusted Travel Program, developed in conjunction with foreign governments and the industry, is important to prepare for the growth of global travel expected over the next decade.

Support Infrastructure Investments

We encourage you to support investments and proposals that will modernize the travel experience to smoothly facilitate domestic travel and ensure the U.S. remains a globally competitive destination. To demonstrate this commitment, ensure that government security fees are wholly committed to supporting our nation's security infrastructure and explore new security technologies, with a priority placed on biometric exit.

Furthermore, investments in better and safer roads, rail systems, and airports will facilitate the movement of travelers throughout the United States from primary to secondary markets. Infrastructure investments benefit domestic industries and economies first and foremost.

III. Public Private Partnership That Fosters a Welcoming Destination

Lastly, you requested an example of a joint activity that could be undertaken by the public and private sector to enhance the welcoming nature of the U.S., while being mindful of security concerns.

Develop a Secure Travel Partnership Program to Demonstrate Enhanced U.S. Security

We believe there could be significant value if you were to establish a public/private initiative called the "Secure Travel Partnership" to encompass existing trusted traveler programs and security frameworks. In conjunction with the Department of Homeland Security, the TTAB, Brand USA and the U.S. Travel Association should develop a value proposition for this program to include message creation and a marketing, branding and communications strategy.

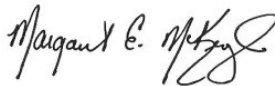
The Secure Travel Partnership would recognize that travel security is a shared responsibility between the government and industry, as is communicating to travelers and potential travelers to the U.S. that they are visiting a country that makes their safety and security a top priority. Leveraging our existing and effective security frameworks, including VWP and Global Entry, will enhance border security. Pairing infrastructure improvements at domestic terminals while expanding the scope of CBP's preclearance program enables the U.S. to identify and stop those who pose threats before they board.

We respectfully submit these recommendations pursuant to your request for input in these areas. And we have established TTAB committees that stand at the ready to assist you and your staff in any work related to these suggestions. We look forward to the opportunity to serve.

Respectfully submitted,



John Sprouls
Chair



Margaret McKeough
Vice Chair



Greg Stubblefield
Vice Chair