Evaluation of the U.S. national tourist office impact on the U.S. travel and tourism industry

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EVALUATION OF THE U.S. NATIONAL TOURIST OFFICE IMPACT ON THE U.S. TRAVEL AND TOURISM INDUSTRY

by

Mary L. Tack

A thesis submitted to the Faculty of the School of Food, Hotel and Tourism Management at Rochester Institute of Technology in partial fulfillment of the requirements for the degree of Master of Science

August 1993
FORM K

ROCHESTER INSTITUTE OF TECHNOLOGY
School of Food, Hotel and Travel Management
Department of Graduate Studies

M.S. Hospitality-Tourism Management

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(2) James Burke
OR (3) Dan O'Brien

Faculty Advisor: Dr. Richard F. Marecki

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ABSTRACT

In an effort to better meet the needs of its customers, the United States national tourist office, U.S. Travel and Tourism Administration (USTTA), surveyed travel and tourism industry organizations to determine their awareness and usage levels for the numerous programs and services offered by USTTA, the value they placed on these programs and services, and where improvements can be made. This survey was especially critical to USTTA as it embarked upon the Total Quality Management philosophy (which focuses on knowing your customers and their needs in order to better serve them).

A secondary issue existed for USTTA to determine if government funding should be spent on programs related to international tourism to the United States.

The questionnaire was sent to all organizations from fourteen travel and tourism industry sectors involved in the international arena. The universe of these industry groups was surveyed so the returns within each sector would be large enough to allow the results to be analyzed separately. Of 3,884 surveys mailed, 1,414 organizations returned completed, usable surveys, resulting in a 37% response rate.

The survey instrument was divided into four sections: USTTA’s Marketing Function, USTTA’s Research Function, USTTA’s Policy Function, and General Questions. The purpose
of the first three sections were to focus specifically on the programs available in each of USTTA’s three functional areas. The desired outcome was to understand which industry groups were aware of which programs, their usage of those programs (except for Policy since their activities cannot be "used"), and their perceived value of those programs. Questions were also developed to learn what specific improvements could be made to better meet the users’ needs. The General Questions section was framed to attain information on whether government expenditures should be made on programs related to international tourism to the U.S. and how USTTA should be funded.

What USTTA learned from this survey was that awareness of the various Agency programs was relatively high in most cases (two-thirds of the programs had awareness levels above 50%) but it differed among industry groups. The groups which are impacted the most by a program were the most likely to be aware of the program and were the heaviest users of that program.

The level of usage provides USTTA with knowledge about where to concentrate its efforts in garnering more users and who to contact with related program information. However, knowing the perceived value allows USTTA to determine if the program is worthwhile providing. The overall value scores for the various USTTA programs were relatively high; on a scale from 1 (low) to 6 (high), the average value rating for
all programs was 4.76. At the individual program levels and industry group levels, these value scores differ.

State tourism offices emerged as USTTA’s primary customer group. Within the individual USTTA function areas, other industry groups surfaced as principal customers.

For the funding issue, overwhelming approval was voiced for having government expenditures made on programs related to international tourism, with the method of funding being the current method -- appropriations.
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CHAPTER 1

INTRODUCTION

The United States Travel and Tourism Administration (USTTA) was established in 1961 by the International Travel Act to serve as the official U.S. government tourism office.

The overall mission of USTTA is two-fold: to promote travel to the U.S. and stimulate travel within the United States. As an agency of the U.S. Department of Commerce, USTTA "helps develop U.S. tourism in an effort to spark economic growth and stability, improve international competitiveness and expand foreign exchange earnings." (U.S. Department of Commerce, 1992)

USTTA is headed by the Under Secretary of Commerce for Travel and Tourism who reports directly to the Secretary of Commerce. The agency is divided into four offices: Marketing, Research, Policy, and Strategic Planning and Administration. The first three offices offer programs, services and activities for the travel and tourism industry and related industries.

The agency directs its operations from headquarters in Washington, D.C. To carry out its international tourism trade development programs, the agency also maintains, under the Marketing umbrella, offices in 10 key tourism-generating markets around the world.

The marketing office offers numerous programs/services
to the industry in both the international marketplace (e.g., cooperative advertising, familiarization programs, travel missions, etc.) and in the United States (e.g., gateway reception services, marketing outreach programs, trade shows, etc.). The research office provides statistical data and reports related to the international traveler by conducting various market research studies and working with other government agencies who collect information on international travelers. The policy office is involved in diverse policy initiatives to encourage travel to and within the United States.

In March 1991, USTTA embarked on the Total Quality Management (TQM) philosophy. USTTA, along with other Government agencies, is adopting the quality service agenda by following the lead of private industry.

One of the primary elements of this TQM philosophy focuses on knowing your customers, what their needs are and satisfying those needs. As part of USTTA’s commitment to TQM, exploring this facet of the TQM philosophy became a major focus for the Agency. Having a better understanding of who their primary customers are in the travel and tourism industry and the needs of those customers is key to USTTA’s success.

PROBLEM STATEMENT

USTTA is unsure how aware the travel and tourism industry is of the Agency and its programs and the value
placed on the programs by those who use them.

Secondarily, USTTA does not know whether the travel and tourism industry feels that the U.S. Government should be expending money on programs related to international tourism to the United States.

PURPOSE

The purpose of this research is to determine:

1. who, in the travel and tourism industry (customers), is aware of USTTA and its various programs, services, and activities;
2. who is using the programs and services being offered;
3. the perceived value of the programs and services by those who are using them;
4. how improvements can be made in the three function areas (marketing, research, policy) to better meet the needs of the industry; and
5. whether the U.S. Government should be expending money on programs related to international tourism to the U.S. and, if so, from where the funds should come.

SIGNIFICANCE

This study will benefit USTTA and its customers in numerous ways.

By knowing the travel and tourism industry’s (customer’s) awareness of USTTA and its function areas
(marketing, research and policy), USTTA can determine which industry (customer) groups know about the Agency and which ones are not as familiar with USTTA. This forms the basis of a more refined definition of the primary customer groups.

Taking this a step further, by knowing which industry (customer) groups use its programs and services, USTTA can determine more specifically who its primary customers (industry groups) are and, the inverse, who the non-users are. From the latter group, USTTA can later focus on why they are non-users, especially if the program or service is one which USTTA thinks would appeal to or benefit them.

By knowing how these users perceive the value of the programs/services, USTTA can determine (1) how useful the program or service is to users and, (2) which user groups give merit to the programs.

Lastly, knowing what suggestions the customers have for improving the function areas (marketing, research, policy) will point USTTA in the necessary direction to better meet customers’ needs.

By knowing who the primary customers are, USTTA can focus its attention on serving those industry groups, especially in following through with the suggestions offered by those groups. This is truly the essence of the study -- understanding who the customers are and their needs.

From the results of the funding questions, USTTA will be able to address concerns posed by the Office of Management
and Budget on whether USTTA should be funded by the Government and, if so, if Government appropriations should be offset by fees collected via other methods.

ASSUMPTION

The assumption is that overall awareness of USTTA is low among the travel and tourism industry as a whole but high among known users (e.g., state tourism offices, city convention and visitor bureaus and the Visit USA Committee members).
CHAPTER 2

LITERATURE REVIEW

This chapter will focus on the background of USTTA, the introduction of Total Quality Management (TQM) at USTTA, an introduction of what the TQM philosophy is (what it is, how it got started, how it differs in private vs. public sector) and, more specifically, the "know your customer" element of TQM, including how to determine/measure that, what others have done and what USTTA is doing/did as its first step into the customer focus arena.

Background on USTTA

The United States Travel Service (USTS) was established in 1961 by the International Travel Act to serve as the official U.S. government tourism office. Its mission was to develop travel to the United States from abroad as a stimulus to economic stability and to the growth of the U.S. travel industry, to reduce the Nation’s travel deficit, and to promote friendly understanding and appreciation of the United States.

It was established with four primary divisions each with separate and distinct functions, audiences, and objectives, yet each was designed to complement and reinforce the efforts of the others. The Sales Promotion Division directed travel advertising and promotional campaigns overseas in order to persuade the potential foreign visitor
that a trip to the U.S. was in his/her best interest. The Facilitation and Planning Division conducted essential research and planning activities, with responsibility for travel facilitation and inter-governmental relations; it worked to influence governmental authorities, both foreign and domestic, to lessen the red tape and inconvenience of the visitor’s travel. The Visitor Services Division developed improved host facilities in cooperation with industry and community leaders; they worked to assure a friendly reception and the broadest possible tourism opportunities for the traveler in the U.S. The Media Relations Division supported each of these activities by enlarging public knowledge at home and abroad of USTS aims and services.

Directing and coordinating the work of these divisions were the offices of the Director, Deputy Director and an Administrative Office. There were also nine overseas travel information offices strategically located to best cover the major potential markets for increased tourism to the U.S. These nine markets included offices in: England, France, Germany, Italy, Mexico, Colombia, Brazil, Japan, and Australia.

USTS also worked with the private travel industry since the international traveler had direct encounters with this group via commercial air carriers and then here in the U.S. with their day-to-day activities. It was essential that
USTS cooperate and work with this group. A Travel Advisory Committee was established to provide a regular channel for industry advice and assistance. The Committee was comprised of 36 members, selected for their ability to represent elements of the industry most concerned with USTS activities. This Committee formed four working subcommittees to correspond with USTS’s divisions. (United States Travel Service [USTS], July 1961-March 1962)

Over the years, USTS continued its efforts to promote increased foreign visitation to the U.S., to educate and work with the industry to provide friendly services to those visitors, to facilitate the entry of foreign visitors and to collect tourism statistics. Some other changes occurring within USTS included: introduction of a BUSIVISIT program to entice businesses to hold their conventions in the U.S.; establishment of an international conventions office in Paris to boost inbound group travel; the opening and closing of several regional offices; enactment of legislation amending the 1961 International Travel Act; creation of an Assistant Secretary of Commerce for Tourism, a Deputy Assistant Secretary of Commerce for Tourism, and an Executive Director; restructuring of the divisions and offices within USTS for increased effectiveness; establishment of a matching grants program; and, transfer of authority from the Interior Department to Commerce to promote domestic travel, which concluded after several

In October 1981, President Reagan signed into law the National Tourism Policy Act of 1981, which transformed the U.S. Travel Service into the U.S. Travel and Tourism Administration (USTTA). The Act provided that the USTTA be headed by an Under Secretary for Travel and Tourism and also included a Deputy Under Secretary and an Assistant Secretary for Tourism Marketing. So while the USTS experienced structural changes when it became USTTA, the agency’s principal mission was still "to develop travel to the United States from abroad as a stimulus to economic stability and to the growth of the U.S. travel industry, to reduce the Nation’s travel deficit, and to promote friendly understanding and appreciation of the United States."
(United States Travel and Tourism Administration [USTTA], 1982)

The National Tourism Policy Act of 1981 also established a number of other goals, which included to:

1. "optimize the contribution of the tourism and recreation industries to economic prosperity, full employment and the international balance of payments of the United States;

2. "make the opportunity for and benefits of tourism and recreation in the United States universally accessible to residents of the United States and of foreign countries,"
and ensure that present and future generations are afforded adequate tourism and recreation resources;

3. "contribute to personal growth, health, history and ethnicity of the United States;

4. "encourage the free and welcome entry of individuals traveling to the United States, to enhance international understanding and goodwill, consistent with immigration laws, the laws protecting the public health, and laws governing the importation of goods into the United States;

5. "eliminate unnecessary trade barriers to the United States tourism industry operating throughout the world;

6. "encourage competition in the tourism industry and maximum consumer choice through the continued viability of the retail travel agent industry and the independent tour operator industry;

7. "promote the continued development and availability of alternative personal payment mechanisms which facilitate national and international travel;

8. "promote quality, integrity, and reliability in all tourism and tourism-related services offered to visitors to the United States;

9. "preserve the historical foundations of the Nation as a living part of community life and development, and ensure for future generations an opportunity to appreciate and enjoy the rich heritage of the Nation;

10. "ensure the compatibility of tourism and recreation
with other national interests in energy development and conservation, environmental protection, and the judicious use of natural resources;

11. "assist in the collection, analysis and dissemination of data which accurately measures the economic and social impact of tourism to and within the United States to facilitate planning in the public and private sectors; and

12. "harmonize, to the maximum extent possible, all Federal activities in support of tourism and recreation with the needs of the general public and the States, territories, local governments, and the tourism and recreation industries, and to give leadership to all concerned with tourism, recreation, and national heritage preservation in the United States." (USTTA, 1982)

The act also created a National Tourism Policy Council and a Travel and Tourism Advisory Board. The basic objective of the Tourism Policy Council is to ensure that the national tourism interest is fully considered in Federal decision making. The Council is mandated to "coordinate policies, programs and issues relating to tourism, recreation or national heritage resources involving Federal departments and agencies." The Council is also directed to "seek and receive concerns and views of State and local governments and the Travel and Tourism Advisory Board with respect to Federal programs and policies deemed to conflict
with the orderly growth and development of tourism." (USTTA, 1982)

The Travel and Tourism Advisory Board, which replaced the Travel Advisory Board, is chartered under the Federal Advisory Committee Act but not statutorily mandated. The Board advises the Secretary regarding the implementation of the National Tourism Policy Act and advises the Assistant Secretary for Tourism Marketing on preparation of the marketing plan for the U.S. Travel and Tourism Administration. The Board is comprised of 15 members appointed by the Secretary, with 12 of the members being senior executive officers of organizations engaged in the travel and tourism industry. The remaining three members include a consumer advocate, an economist, statistician or accountant, and an individual from the academic community who is knowledgeable in tourism, recreation, or national heritage conservation. (USTTA, 1982)

Over the years, USTTA made inroads on the goals established by the National Tourism Policy Act of 1981 by initiating an in-flight survey of visitors to the United States to produce valuable research on the international traveler characteristics; production of various research reports on the international traveler for public dissemination; consulting with various foreign governments on travel and tourism matters; representing the U.S. travel and tourism interests at various international
intergovernmental meetings (e.g., World Tourism Organization, Organization of American States, Organization for Economic Cooperation and Development); working with other government agencies such as Immigration and Naturalization and Customs to facilitate entry to the U.S. by international travelers; supporting development of a brochure on how the U.S. welcomes handicapped visitors; and working with and sponsoring trade shows with travel agents and tour wholesalers, among other activities. (USTTA, 1985)

In 1990, senior management at USTTA were introduced to the concept of Total Quality Management (TQM) since more and more of the agencies within the Department of Commerce were getting involved with it and it was a means by which the agency could improve itself. The TQM philosophy focuses on quality and deals with doing things right the first time, knowing who your customers (internal and external) are and their needs and then trying to satisfy those needs. Senior management at USTTA became committed to involve the whole agency in this new philosophy and set out to introduce the concept to agency employees. To do this, USTTA procured the services of the Federal Quality Institute (FQI), which was established in 1988 to be the primary source of information, training, and consulting services to agencies on TQM. Its three major functions were to provide quality awareness seminars and follow-up consultation to senior Federal managers; to develop and maintain a roster of qualified
private-sector consultants; and to operate a Resource Center that would be a clearinghouse and referral source of information on TQM. (Federal Quality Institute [FQI], 1991)

Introduction of TQM

The Federal Quality Institute introduced USTTA to the basics of TQM. Their definition of TQM is:

Total quality management is a strategic, integrated management system for achieving customer satisfaction. It involves all managers and employees and uses quantitative methods to improve continuously an organization's processes. It is not an efficiency ("cost cutting") program, a morale-boosting scheme or a project that can be delegated to operational managers or staff specialists.

At the foundation of Total Quality Management are three principles: Focus on achieving customer satisfactions; seek continuous improvement; and full involvement of the entire workforce. Achieving these principles requires the establishment of a cultural shift within an organization aimed at making the new culture more participative. (FQI, 1991)

Coopers & Lybrand define TQM as "involving everyone in an organization in controlling and continuously improving how work is done, in order to meet customer expectations of quality." (Carr, Littman, 1990, p.3)

It is a set of principles, tools, and procedures that
provide guidance in the practical affairs of running an organization. (Carr et al., 1990)

Another way of looking at it is to describe TQM as a "journey to excellence" since it entails a long range effort with many goals. (Hyde, 1990-91) It is a process, not a program or quick-fix strategy. It is a methodology that is developed to replace the old ways and to guide corporate activity year after year; it is not temporary. (Berry, 1990)

The essence of TQM is involving and empowering the entire workforce to improve the quality of goods and services continuously in order to satisfy, and even delight, the customer. To achieve this goal requires identifying customers and their needs, having a clear idea of how the organization plans to go about meeting expectations, and making sure that everyone in the organization understand the customers’ needs and is empowered to act on their behalf. The Federal approach to TQM emphasizes seven elements or practices that, when integrated as a strategy of quality improvement, results in the fundamental changes required for an organization to achieve a commitment to total quality that meets the above descriptions. (FQI, 1991)

These seven elements are described below:

1. **Top Management Leadership and Support** – In summary, the leaders in the organizations must be committed to the TQM philosophy and enforce that commitment and support to
all employees.

This is the first and most critical element of TQM. Top managers must be directly and actively involved in establishing an environment that encourages change, innovation, risk-taking, pride in work, and continuous improvement on behalf of all customers. These managers assert the vision of what the organization can achieve, and they communicate the quality policies and goals throughout the organization. Top managers ensure that communications are open and effective throughout the organization, among all employees and with customers and suppliers. They involve employees in the early stages of the quality planning process, and they empower workers on the line to make decisions. They shift their efforts from directing and controlling how the operations will be carried out to identifying and removing barriers that prevent employees from meeting customer requirements and expectations the first time and every time.

2. **Strategic Planning** - Quality improvement in an organization is a result of a planned strategy; planning for quality is integrated into the strategic business planning process. A primary goal of the strategic plan is to map out the long-term strategy to bring about the cultural change that encourages pursuit of excellence on behalf of customers and that nurtures risk-taking and employee participation. The plan establishes the goals for attaining superior levels
of customer satisfaction and organizational performance. The plan defines how the organization intends to fulfill customer expectations over the next several years; it is updated periodically. Everyone in the organization contributes ideas to the plan and is aware of its implications of their own areas of responsibility.

3. **Focus on the Customer** - Both internal and external customers are identified, along with their needs.

Following the strategic plan to meet customer expectations, actively involving customers and finding out exactly what they want is central to a quality management effort. Only the customers know what they want and what they think of current services and products. Their expectations are also likely to change over time.

Organizations should have a wide range of methods for obtaining and assessing customer feedback. Customers should have easy access to the organization for obtaining information and resolution of their problems at the front-line level. The organization should balance fairly the conflicting needs of different customer groups, and should set priorities for how those needs will be met. Quality organizations adopt a service orientation as the primary means of achieving their mission.

Internal customers are just as important as external customers. Within an organization, work normally is passed from one worker to another. Under TQM, each worker who
passes work to another is a customer and they should attempt to determine his/her needs and requirements in order to improve the quality of the final product or service.

4. Measurement and Analysis of Products and Processes - Information is collected from all levels of customers and used to improve the organization.

A system should be put in place to allow the organization to determine systematically the degree to which products and services please customers, and focus on internal process improvement. Data should be collected and analyzed on a continuing basis to determine variation in processes. Any variations can be examined to determine whether they result from special circumstances or from recurring or "common" causes. Different strategies should be adopted to correct each occurrence.

The immediate objectives of the analysis and measurement effort are to reduce rework, waste, and cycle-time and to improve cost-effectiveness and accuracy. The ultimate objectives are to assure that the organization understands the extent to which customer satisfaction is being realized, where there are deficiencies, and why, and to isolate causes that can be attacked systematically.

5. Commitment to Training and Recognition - Employees are trained not only in technical skills needed for their job but also in principles and practices of quality improvement. It includes education and training in quality
management concepts and skills such as teamwork, problem-solving skills, and methods for collecting and analyzing data using basic statistical tools.

Employees need to be recognized and rewarded for their contributions to quality improvement. This should be done in ways that are meaningful and timely. Positive performance must be reinforced. An organization that claims to be quality driven but measures and rewards for such things as conformance to schedule without regard to quality is sending conflicting messages to its employees. Employee motivation and commitment can be dramatically improved with non-monetary awards and recognition.

6. **Employee Empowerment and Teamwork** - Employees work in teams to analyze and improve work processes; they are also delegated authority by management to resolve customer problems.

Once top management has embraced TQM and made the commitment, employee involvement, empowerment and teamwork becomes a critical ingredient to achieving a quality commitment throughout an organization. The first step is to involve employees in identifying and solving problems; this could be done through employee teams working on specific process or operating issues, cross-functional problem-solving teams, self-managing teams, and active suggestion systems. The key is that employees be empowered to make real and lasting changes. When workers are directly
involved in identifying and solving problems that are affecting the quality of the work they perform, the experience the satisfaction of making tangible contributions to the quality of their work and frequently are motivated to make continuing and lasting improvements to the work they do.

These employee involvement efforts must be supported and reinforced by recognition and support for the employee teams.

7. Quality Assurance - There is a focus on assuring continuous improvements in the quality of work produced; there is an emphasis on prevention of errors rather than inspection to catch errors.

To meet customer quality requirements, the work processes used to produce their products and services must be designed to prevent problems and errors from occurring in the first place. Processes are designed both to prevent errors and to detect and correct them as they occur throughout the process.

Although the adoption and integration of these seven practices are essential, leaders beginning a TQM effort should bear in mind that to realize the full potential of TQM requires a fundamental cultural change. When this transformation has occurred, everyone in the organization is continuously and systematically working to improve the quality of goods and services, and the processes for
delivering them, in order to maximize customer satisfaction. TQM becomes a way of managing that is embedded in the culture and environment of the organization, not simply a set of specific management techniques and tools. (FQI, 1991)

TQM started with big manufacturing companies that faced challenges from Japanese competitors. After World War II, Japanese manufacturers adopted the quality messages of such American advisers as W. Edwards Deming and J.M. Juran. (Barrier, 1992) Deming convinced them of the critical importance of statistical techniques and control processes and their impact on quality. Juran emphasized the broad management aspects of quality and focused on planning, organizational issues, management’s responsibility for quality, and the need to set goals and targets for improvement. Other Americans also made important contributions to their quest for quality (Philip B. Crosby and Dr. Armand V. Feigenbaum). All stressed the importance that top management plays in establishing the climate and systems for assuring that quality is given preeminence in the organization’s mission, establishing the systems to assure that everyone can contribute to this objective, and empowering the entire work force to improve quality. The Japanese adapted the teachings of these Americans and others to their own culture. They developed the concept of Kaizen, or continuous improvement, and pioneered the use of quality
circles (teams of workers that identify specific management problems and devise solutions to them). (FQI, 1991)

Through these practices, Japanese products had become known for superior high quality by the 1970’s. U.S. manufacturers fought back with their own quality programs. (Barrier, 1992) They realized that they needed to focus on a quality effort for the same reason the Japanese embarked on it -- survival in the world marketplace. Many U.S. business leaders went to Japan to observe first-hand how the Japanese managed such a transformation in their production processes and have taken similar approaches in their own companies. (FQI, 1991)

TQM has become very popular in the last decade in both the public and private sectors. (Hyde, 1990-91) It continues to gain more acceptance and more converts in the public sector. (Hyde, 1991-92) Although many in the private sector argue that TQM does not apply to the government since it does not operate in a competitive environment, is constrained by Congressional restrictions, does not have customers and is largely a service industry emphasizing administrative processes rather than manufacturing, but TQM principles do apply. In some ways, the incentive for the Federal Government to apply TQM is similar to the reasons which caused many private companies to embark on the TQM effort -- a crisis of survival. With budget cutbacks threatening, Federal managers must carry out
their current missions more effectively. Also, the demand for more quality service from the government is increasing. With more and more customers experiencing quality service from private firms, they are beginning to expect that same level of service from their government. (FQI, 1991)

The TQM effort started becoming government-wide in February, 1986 when a Presidential Executive Order was issued which formally established a government-wide effort to improve the productivity, quality, and timeliness of government products and services. It began as a productivity improvement program but gradually evolved into a Total Quality Management effort by mid-1988. (FQI, 1991)

Implementing TQM has proved to be a challenge for many organizations since there are no specific methods to follow. It is a continuing process which occurs over a long period of time. The TQM elements/factors must be incorporated into the individual dynamics of each organization. Implementing TQM in the public sector, however, requires attention be given to special demands. These demands include different management styles, legal, budget, and operating constraints, internal organizational cultures, and political pressures and influences. (Hyde, 1991-92)

Private industry uses TQM to compete and survive in the marketplace. For the public sector, the reasons for using TQM are better service to citizens, tight budgets, getting and keeping the best employees, and survival. A consumer
opinion survey conducted in 1988 on government quality found that half of the survey respondents thought government should make more effort to improve but a third gave up hope and said that government services should be turned over to the private sector. (Carr et al., 1990)

Don G. Mizaur, the new director of the Federal Quality Institute, in an interview with the Government Executive (1992) about how federal quality-improvement initiatives compare with private-sector efforts says:

Everyone anticipates that the public sector will need to follow the private sector and continuously learn to do more with less. This began to happen in many civilian agencies a few years ago and is now occurring in all three branches of the armed services.

The outlook for government without quality management certainly isn’t good. Financial crises continue in state and local governments.

He also states:

Quality management is not something that can easily be mandated...you can’t demand that people rethink their values about how an organization runs.

Because there is no calamity driving government, the quality movement has not been driven from the top down, as it has been in the private sector. In the current grass roots movement of the public sector, the initiatives have often been blessed from on high, but
not always fully supported.

Measuring Customer Needs

The underlying focus of quality gets down to the customer level -- quality is meeting customer’s needs and reasonable expectations. A customer who buys a product or experiences an organization’s service has certain needs and expectations in mind. If the product or service continues to meet or exceed those expectations, then, in the mind of that customer, it is a quality product or a quality service. (Berry, 1991)

Following in this vein of quality and it’s customer focus, it is important to define what a customer is. According to Albrecht and Bradford (1990), a customer is "someone who comes to you and buys your product or service and who expects quality of service as well as product quality in return for his or her investment." (p. 15) The success of each business depends upon selling what that customer wants to buy. This means knowing customers’ wants, needs, attitudes, and buying tendencies. Most businesses only have a basic understanding of their customers’ thinking. (Albrecht, Bradford, 1990)

It is important for organizations to take the pulse of their customers on a regular basis because their expectations constantly change and economic conditions and the whims of the marketplace are variable. There are even differences in customers and their needs within close
geographical confines. (Albrecht, Bradford, 1990)

One way of measuring customers’ attitudes, values, beliefs, wants, feelings, and expectations is through a customer report card. This report card is a physical, tangible, management tool which provides data, from the customers’s perspective, on an organization’s service performance. It contains four kinds of information: the key service quality attributes; the relative desirability and importance of each attribute to the customer; the organization’s scores on these attributes, and the attributes and scores of the competition, if applicable. (Albrecht, Bradford, 1990)

In preparing this report card, it is important to know who the customers are, what service attributes are most important to them and how the organization is doing in meeting their service requirements.

In determining who the customers are, there are different levels of customers to consider. According to Albrecht and Bradford (1990), the first level of customer is someone an organization does business with (those who buy the organization’s product or service). The second level of customer would be those with whom the company may have a mutual interdependence. The third level are often the company’s own employees or persons outside the company that make it possible for the company to conduct its business. And, lastly, the fourth level may not have direct
interaction with the business but they are important to its success. By separating customers into these various levels, one can determine which customer report cards should be focused upon first in order to gain a service advantage. This will also provide a framework for making business decisions about the organization’s service improvements. (Albrecht, Bradford, 1990)

In the government, the customer is anyone who receives or uses what the government produces, or whose success or satisfaction depends on the government’s actions. At the most fundamental level, that user will be an internal customer, another unit or person in the organization whose part in a work process follows that person or who uses that person’s output to do their job. At the ultimate level, the final product or service user is an external customer. (Carr et al. 1990)

To facilitate this identification, Carr and Littman (1990) suggest a customer exercise worksheet which asks three basic questions: "(a) whom do you deal with when doing your job; (b) who gets the output of what you do (internal to your group and external to your group); and (c) whose success or satisfaction depends upon your actions." (p. 35)

To discover a customers’ important service attributes, the most direct and simplest way is to ask them directly. This can be done via focus groups. From these results, a survey can then be created to reflect the items customers
say they are interested in. In this survey, customers can be asked to score a business on the level of performance for each of the service factors the business wishes to assess. With these results, the organization will have the basis of determining how well they are meeting their customers’ expectations. (Albrecht, Bradford, 1990)

The purpose of asking customers how they are experiencing what an organization offers is to find out how that organization can improve itself and keep their business or get more of it. Many organizations are obsessed with performing against standards that are not relevant to the customer. (Albrecht, 1992) This ties in with market research conducted in many organizations which focuses on determining whether there is a need or demand for a particular type of product or service. The limitation with this is that it begins with the answer, the already defined product or service package, and then asks the questions. This does not get at what customers would like to see in a product or service package. (Albrecht, 1992)

Other methods of obtaining feedback from customers, besides surveys and focus groups as mentioned above, include comment forms, personal visits, toll-free telephone service lines, and customer advisory committees. These methods can be used to obtain information about wants and needs, concerns, specific services, needs/issues for improvement, and overall quality ratings. (Carr et al., 1990)
The method USTTA chose to use in this project was a mail survey. The focus of the research was to determine who USTTA’s external customers are and whether they are even aware of USTTA’s numerous programs/services. If they are aware of the program/service, their usage and value of that program/service was asked. The focus on their needs and wants was minimal at this stage in the research since USTTA first needed to determine who their customers are. However, the "customers" (respondents) were asked what improvements could be made to better service them; these were concentrated on the three function areas of USTTA (marketing, research, and policy) and were broad in scope.
CHAPTER 3

METHODOLOGY

Target Group

Rather than preclude any travel and tourism industry group as potential customers, USTTA defined its potential customers, for purposes of this study, as the entire U.S. travel and tourism industry. They may not all be involved in the international market but the possibility exists. It is important for USTTA to know who in the industry is aware of USTTA and who uses the programs/services provided by the Agency.

To determine which industry groups would be classified as USTTA's primary customers, each of the various groups within the travel and tourism industry will be analyzed as a separate entity. Under this scenario, it was necessary to survey a large enough population within each of the industry groups. For these reasons, the entire universe of each travel group was surveyed.

The specific industry groups surveyed are listed below with the population size and a description on how the population was selected.

1. Visit USA Committee members (N=726)

In each of the USTTA primary and special markets, international marketing activities are developed in coordination and cooperation with an organized Visit USA
Committee. The size and composition of the individual Committee varies, but always includes senior marketing representatives of U.S. travel interests resident in each country, and local national tourism interests actively involved in selling travel to the United States. The types of organizations included in this Committee are airlines, tour operators, travel agencies, hotels, and car rental companies, to name a few.

2. State tourism offices and regional tourism promotional offices (N=60)

In addition to the tourism offices for each state, specific tourism regions, which comprise various states, were surveyed, such as Foremost West, Southeast Tourism Society, America’s Heartland, New England USA, Visit the USA West, etc.

3. City convention and visitor bureaus (CVB’s) (N=342)

These listings of CVB’s came from the International Association of Convention and Visitors Bureaus.

4. The lodging industry (small, medium and large size hotels/motels) (N=710)

Included in the survey were owner/operator/marketing companies collected from the American Hotel and Motel Association.

5. Airlines which carry passengers from other countries to the U.S. (N=113)

These airlines included both U.S. flag carriers and
foreign flag airlines which carry passengers from other countries to the U.S. The airline names and addresses were obtained from the World Aviation Directory.

6. International airport authorities (N=157)

These are comprised of international airports in the United States with lists obtained from the Airport Operators Council International.

7. Cruise lines (N=32)

The list of cruise lines surveyed were obtained from Cruise Line International Association.

8. Amtrak (N=1)

9. Motor coach companies (N=441)

The names of the motor coach companies were collected from the American Bus Association and included Interstate Commerce Commission common carriers.

10. Car rental companies (N=198)

The list of car rental companies were obtained from the American Car Rental Association and included those identified as travel-related rental companies.

11. Attractions (N=713)

The attraction names and addresses were obtained from the International Association of Amusement Parks and Attractions and included only "attraction" members.

12. Receptive tour operators (N=160)

The names of these tour operators were obtained from the National Tour Association membership and included
those who perform receptive services in the U.S.

13. U.S. Government agencies (N=14)

Government agencies which deal with USTTA in various capacities were surveyed. These include agencies such as Bureau of Economic Analysis, Immigration and Naturalization Service, Federal Aviation Administration, U.S. Customs Service, Bureau of Census, International Trade Administration, National Park Service, etc.

14. Travel trade associations (N=40)

This listing of associations was gathered from the Travel Industry Association of America and included such organizations as: American Car Rental Association, American Recreation Coalition, American Ski Federation, National Business Travel Association, National Caves Association, U.S. Tour Operators Association, American Society of Travel Agents, National Tour Association, American Hotel and Motel Association, etc.

15. Travel research and consulting firms (N=168)

These organizations were selected from the Travel and Tourism Research Association membership and included such firms as Burke Marketing Research, Canadian Tourism Research Institute, CIC Research, Davidson-Peterson Associates, GLS Research, Hunt & Hunt, Lakewood Research, Market Facts, Mc Clellan Corporation International Mediamark Research, Menlo Consulting Group, NFO Research, Opinion Research Corporation,
Pannell Kerr Forster, etc.

Cover Letter

Since USTTA’s functions cover diverse areas, in any given organization there could be numerous individuals who deal with USTTA and its varied programs/services. In order to cover the broadest area of the organizations, and to reach the various areas within any given organization which deal with USTTA, the cover letter and questionnaire were sent to the President or highest level official. The President was requested to complete the survey as much as possible and then pass it along to others in the organization who deal with USTTA in the marketing, research and policy function areas. (See Appendix A.)

Survey Questions

In general, the survey questions dealt with the importance of international travel and tourism to the U.S. for these organizations, their general awareness of USTTA and its numerous program/services, and requesting suggestions for improvement.

The first set of questions screened out those not involved with the international travel and tourism market to the United States. Specifically asked were questions about the importance of the international market (Appendix B, question 1) and whether they were involved in this market (Appendix B, question 2); if they are not involved, they were asked if they would like to become involved (Appendix
B, question 2a), what is keeping them from entering the market (Appendix B, question 2b) and what assistance would help them get involved (Appendix B, question 2c). If the organizations were not involved in the international market, they were thanked for their cooperation and were asked to return the survey (Appendix B, question 2d).

Respondents were also asked if their organization works with state tourism offices, international tourism promotion organizations or city convention and visitors bureaus when dealing with the international market (Appendix B, question 3).

The next set of screeners for those who were involved in the international market dealt with their awareness of USTTA (Appendix B, question 4) and its three function areas of marketing, research and policy (Appendix B, question 5). For those who were aware of USTTA and at least one of its function areas, respondents were asked (for all programs, services, publications and activities offered in USTTA’s three function areas) about their awareness, usage (marketing and research) and, value (only asked of those who used any of the marketing or research programs, services, or publications). The survey was divided into the three function areas.

The marketing section included a list of 20 programs/services. Approximately half of these 20 services are offered in the international marketplace and the other
half are offered in the United States.

The international services include: cooperative trade and consumer advertising, travel agent and journalist familiarization programs, travel agent seminars and workshops, travel missions, trade shows, consumer information service centers, marketing assistance from USTTA foreign offices and promotional literature.

The services provided in the United States include: international congress programs, gateway reception service, disaster relief financial assistance program (DRFAP), marketing outreach programs, international tourism conference (ITC), Pow Wow - USA, Marketing U.S. Tourism Abroad, Tourism USA: Guidelines for Tourism Development Manual and the service of answering information requests from the trade and public.

For each of these programs/services, the organizations were asked if they were aware of the programs/services, if they used the programs/services, and, if used, what value they placed on it, ranking the value from 1 to 6, with 6 meaning high value and 1 meaning low value (Appendix B, question 6). With the six point scale, respondents were forced to select either the positive or negative side of the scale; no "middle of the road" score was available. A score of 3.50 would be considered the mid-point.

Organizations were then asked about the overall quality of the marketing programs and services using the same 6
point scale as described above (Appendix B, question 7). Overall satisfaction with the marketing programs/services was asked, with options of "very satisfied," "somewhat satisfied" and "not satisfied" (Appendix B, question 8). Comments or suggestions were also solicited to improve the marketing function and to increase its usefulness to the respondent; this was an open ended question (Appendix B, question 9). From here, the questions turned away from USTTA and to the market efforts of the respondent’s organization. In order for USTTA to know what activities the industry uses to promote itself, a question was asked about that (Appendix B, question 11). The activities included: trade advertising, consumer advertising, familiarization trips, seminars and workshops, press and public relations, travel missions, trade/tour development, trade shows, promotional literature and maintenance of offices or representatives abroad.

The research function appeared in the next section. Seven research publications and one service were listed for the respondents to indicate their awareness, usage and value, if used (Appendix B, question 12). The research publications included: the In-Flight Survey of International Air Travelers, the Pleasure Travel Market to North America studies, Summary and Analysis of International Travel to the U.S., Canadian Travel to the U.S., Recap of International Travel to and from the U.S., Impact of Foreign Visitor
Spending on State Economies and the Outlook for International Travel to and from the U.S. The one service was answering information requests from the public and trade. In rating the value of these publications or service, respondents were given a scale from 1-6 (6=high value, 1=low value). As described above, the six point scale forced respondents to select either the positive or negative side of the scale, allowing no "middle of the road" score. They were also asked about their overall satisfaction with the research program (Appendix B, question 13). Comments and suggestions for improvement were solicited (Appendix B, question 14). The question then focused on what sources they use to develop their international marketing strategies (Appendix B, question 16).

The policy section followed. The respondents were asked about their awareness of 11 activities conducted in the policy office (Appendix B, question 17). These activities included: bilateral tourism agreements, bilateral trade agreements and side letters, rural tourism initiative, general agreement on tariffs and trade (GATT), EC’92 Interagency Task Force, U.S.-Canada Free Trade Area Agreement, minority tourism development, tourism policy council, world’s fairs and international expositions, facilitation policies and air transport negotiations (CIVAIR). Since these activities are not "usable",

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respondents were not asked whether they use the activities but they were asked about the value (if they were aware of the activity). Respondents were asked to rate the value from 1 to 6 (6=high value, 1=low value), the same as Marketing and Research. With the six point scale, respondents were forced to select either the positive or negative side of the scale. Overall satisfaction was asked (Appendix B, question 18) and comments and suggestions for improvement (Appendix B, question 19). Turning away from USTTA, the survey asked what policy issues were important to the industry (Appendix B, question 20).

Regarding the secondary problem area of funding for USTTA, questions were interspersed throughout the three function areas. These questions focused specifically on whether the respondents thought the U.S. Government should expend money on: promoting international tourism to the United States (Appendix B, question 10), collecting international travel/tourism statistics and research information (Appendix B, question 15), and international tourism policy issues (Appendix B, question 20). For all three questions, respondents had to indicate their level of agreement (strongly agree, agree, disagree, or strongly disagree). Two final questions related to the funding of USTTA as a whole were asked at the very end of the survey. The first question asked if they believe the U.S. Government should make expenditures on programs related to
international tourism to the United States (Appendix B, question 22). The second question was for those who indicated in the affirmative. They were given a list of four funding possibilities and were asked how they thought USTTA should be funded (Appendix B, question 23). The four funding approaches were: facilitation fee paid by airlines and cruise lines for all international visitors carried to the U.S., bed tax on international visitors collected by U.S. lodging establishments, departure fee on all individuals leaving the U.S. (for business or pleasure), and appropriations from U.S. general tax revenues. They were given the option of selecting any of the four approaches they thought would be appropriate and were given a place to write in other options.

Mailings

The first mailing was sent on August 12, 1991. A follow up mailing was sent on August 27, 1991 to those who had not returned completed questionnaires. A copy of the cover letter for the follow-up mailing can be found in Appendix C.

Contract Services

To facilitate the implementation of this survey, a contractor was hired to work with the trade associations in collecting the names and addresses of their appropriate members, print the surveys and cover letters, stuff and mail the packages, keep track of the returns, mail the second mailing to those who had not yet returned their completed
surveys, code the responses, conduct the data entry and produce computer tables with the results.
CHAPTER 4
RESULTS AND DISCUSSION
Response Rate

On August 12, 1991, 3,884 surveys were mailed to organizations in the travel and tourism industry. A reminder mailing was sent on August 27th to those who did not respond to the first mailing. By October 15th, a total of 1,421 surveys had been returned, of which 1,414 were usable. Excluding 47 surveys which were returned by the post office as undeliverable, this amounts to a 37% response rate. This is within the range of the modal response rate of 20-40% for mail surveys according to Green, Tull, and Albaum (1988). However, response rates from businesses tends to be even lower than from households (Jobber, Saunders, 1988).

In further analyzing the returns, the percentage of returns for most of the travel and tourism industry groups comes close to matching the representation by those groups. For example, Visit USA Committee members represent 19% of the universe and they also represent 19% of the returns. Likewise, tour operators represent 4% of the universe surveyed and 4% of the surveys returned. Some of the returns are not as closely matched though, e.g., attractions represent 18% of the universe and 14% of the returns. This fairly close match-up is a good indication that the returns are representative of the target group. The breakdown of
the groups surveyed and their response rates can be found on Table 1.
<table>
<thead>
<tr>
<th>Travel and Tourism Groups</th>
<th>Response Rates</th>
<th>Total Mail-Outs</th>
<th>% of Total Mail-Outs</th>
<th>Total Returns</th>
<th>% of Total Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit USA</td>
<td>36%</td>
<td>726</td>
<td>19%</td>
<td>264</td>
<td>19%</td>
</tr>
<tr>
<td>States/Regions</td>
<td>60%</td>
<td>60</td>
<td>2%</td>
<td>36</td>
<td>3%</td>
</tr>
<tr>
<td>Cities (CVB’s)</td>
<td>50%</td>
<td>342</td>
<td>9%</td>
<td>170</td>
<td>12%</td>
</tr>
<tr>
<td>Research Firms</td>
<td>42%</td>
<td>168</td>
<td>4%</td>
<td>71</td>
<td>5%</td>
</tr>
<tr>
<td>Airlines</td>
<td>26%</td>
<td>113</td>
<td>3%</td>
<td>29</td>
<td>2%</td>
</tr>
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<td>Airport Authorities</td>
<td>57%</td>
<td>157</td>
<td>4%</td>
<td>89</td>
<td>6%</td>
</tr>
<tr>
<td>Cruise Lines</td>
<td>28%</td>
<td>32</td>
<td>1%</td>
<td>9</td>
<td>1%</td>
</tr>
<tr>
<td>Car Rental</td>
<td>41%</td>
<td>198</td>
<td>5%</td>
<td>82</td>
<td>6%</td>
</tr>
<tr>
<td>Train/Bus</td>
<td>40%</td>
<td>442</td>
<td>11%</td>
<td>176</td>
<td>12%</td>
</tr>
<tr>
<td>Tour Operators</td>
<td>38%</td>
<td>160</td>
<td>4%</td>
<td>60</td>
<td>4%</td>
</tr>
<tr>
<td>Attractions</td>
<td>27%</td>
<td>713</td>
<td>18%</td>
<td>193</td>
<td>14%</td>
</tr>
<tr>
<td>Lodging</td>
<td>29%</td>
<td>710</td>
<td>18%</td>
<td>202</td>
<td>14%</td>
</tr>
<tr>
<td>Other (1)</td>
<td>52%</td>
<td>63</td>
<td>2%</td>
<td>33</td>
<td>2%</td>
</tr>
<tr>
<td>Unknown (ID deleted)</td>
<td>n/a</td>
<td></td>
<td></td>
<td>7</td>
<td>*</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>37% 3,884**</td>
<td>100%</td>
<td>1,421</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

(1) Consists of Government agencies, travel trade associations and miscellaneous customers of USTTA’s Office of Policy.

* Less than 1%.

** Of the 3,884 surveys mailed out, 47 were returned by the post office as undeliverable.
Statistical Accuracy

Accuracy of the results is an issue of major concern. If the full census of travel and tourism organizations had been achieved, the accuracy of the results would have been 100%. However, only a portion of that goal was achieved. At an observed percentage of 50% and a confidence level interval of 95%, there is an accuracy range of +/-2.1%. This range includes a sampling fraction adjustment, necessary when dealing with attempted censuses. For instance, on the following pages it is observed that 57% of all those who responded to the survey are aware of USTTA. At an observed 57%, the accuracy range is +/- 1.7%; therefore, we can say with 95% confidence that the awareness ranges between 55.3% and 58.7%.

The analysis of the results is performed using two different methods. The first is a question by question analysis focusing on overall results. The second analysis looks at the responses by each of the industry groups to provide a more detailed analysis for those groups. The following analysis begins the first method of question by question.

Question by Question Analysis

Importance of and Involvement in International Tourism

Respondents were asked how important international travel and tourism to the U.S. is to their organization and if they are currently involved in the international travel
and tourism market.

As shown in Figure 1, the majority of the travel industry groups felt that international tourism was very or somewhat important to their organization. Attractions were the only ones where more than half (52%) of those who responded indicated international tourism was not important to their organization.

International tourism is considered very important for Visit USA Committee members (91%), airlines (86%), states/regions (78%), U.S. airport authorities (63%), lodging (61%) and city CVB’s (53%).

With the exception of two groups (public land transportation and attractions), the majority of those surveyed indicated they were involved in international tourism. (See Figure 2.)

Only 38% of the public land transportation group and 16% of attractions said they were involved in international tourism. For the other industry groups, more than half of them are involved in international tourism.

Those with the strongest involvement include: Visit USA Committee members and states/regions (100% each), research/consulting firms (80%), airlines (78%), airport authorities (69%), city CVB’s and "other" (67% each) and lodging (65%).
FIGURE 1

Importance of Int'l Tourism
Very/Somewhat Important

- Visit USA: 100%
- States/Regions: 90%
- Airlines: 56%
- Other*: 46%
- Airport Authorities: 95%
- Lodging: 94%
- City CVB's: 94%
- Car Rental: 80%
- Average: 80%
- Tour Operators: 65%
- Public Land Trans.: 80%
- Research Firms: 80%
- Cruise Lines: 66%
- Attractions: 47%

* misc. govt. agencies, trade assoc., and misc. Policy customers.
FIGURE 2

Involvement in Int'l Tourism

Visit USA: 100%
States/Regions: 80%
Research Firms: 78%
Airlines: 69%
Airport Authorities: 67%
City CVB's: 67%
Other *: 63%
Lodging: 63%
AVERAGE: 63%
Tour Operators: 59%
Cruise Lines: 56%
Car Rental: 56%
Public Land Trans. Attractions: 39%

* misc. govt. agencies, trade assoc., and misc. Policy customers.
With public land transportation and attractions having the least involvement in international tourism, approximately two-thirds (68%) of the public land transportation group indicated an interest in getting involved. The interest is much lower for attractions -- 21% of those attractions not involved are interested in getting involved.

Lack of knowledge or experience and budget restrictions were the two main reasons given for not entering the international market. For the public land transportation group, the main reason was lack of knowledge, cited by 52% of those who indicated an interest in getting involved.

When asked what assistance will help them get involved in the international market, "how to" information, such as newsletters, publications or lists of names/addresses of people/organizations to contact, was mentioned by more than half of those interested in getting involved. For the public land transportation group, it was mentioned by 61%.

Respondents were asked if their organization works with state tourism offices, international tourism promotion organizations or city CVB’s when dealing with the international market. All industry groups answered with 60% or more in the "yes" category.

**Awareness of USTTA and its Function Areas**

Respondents were asked if they, or anyone in their organization, are aware of the United States Travel and
Tourism Administration and its three function areas. Many of the respondents, however, did not answer these awareness questions but continued on to answer the remainder of the survey. Therefore, the awareness of USTTA and its function areas is probably higher than presented here. Nonetheless, the percentages mentioned here are only for those who actually responded to the question.

With a few exceptions, awareness of USTTA is very high among all travel industry groups. This is illustrated in Figure 3. Of those who responded to the survey and are involved in the international travel and tourism market, 81% indicated they, or someone else in their organization, are aware of USTTA. Awareness of USTTA by all respondents is still a high 57%, which represents approximately 2,200 organizations.

Among the various industry groups, states/regions, cruise lines and "other" were all aware of USTTA. Nearly all of the city CVB’s (98%), Visit USA Committee members (97%), and research firms (96%) were aware of USTTA. (See Figure 3.)

Car rental companies were the least familiar with USTTA with only 22% indicating awareness. Half of the public land transportation companies are aware of USTTA and 58% of the attractions indicated awareness. (See Figure 3.)
FIGURE 3

Awareness of USTTA by Industry Groups

- States/Regions: 100%
- Cruise Lines: 100%
- Other*: 100%
- City CVB's: 98%
- Visit USA: 97%
- Research Firms: 96%
- Airlines: 92%
- Lodging: 81%
- Average: 81%
- Tour Operators: 76%
- Airport Authorities: 65%
- Attractions: 50%
- Public Land Trans.: 50%
- Car Rental: 22%

* misc. govt. agencies, trade assoc., and misc Policy customers.
Of the three USTTA functions surveyed (Marketing, Research, and Policy), the Marketing function achieved the highest awareness, with 79% of all respondents aware. Among the various travel industry groups, awareness of Marketing was very high with states/regions (100%), cruise lines (100%), Visit USA Committee members (91%), "other" (89%), cities (88%), research firms (85%), and airport authorities (74%). Car rental companies had the lowest awareness (22%). (See Figure 4.)

Awareness of the Research function followed closely behind Marketing with 74% awareness overall. With the exception of car rental companies, with only 6% expressing awareness, more than half of the other industry groups expressed awareness of Research, some with 100% awareness. (See Figure 5.)

Fewer respondents were aware of the Policy function, which experienced a 57% overall awareness. For Policy, awareness was highest among states/regions (88%), research firms (76%) and "other" (95%); "other" is where many customers of the Policy Office are included. Awareness is low among car rental companies, tour operators, lodging, airlines and attractions. With the exception of airlines, Policy does not deal with these other groups so the low awareness is not surprising. (See Figure 6.)
Awareness of Marketing Function by Industry Groups

States/Regions: 100%
Cruise Lines: 100%
Visit USA: 91%
Other *: 88%
City CVB's: 80%
Research Firms: 85%
AVERAGE: 79%
Airport Authorities: 74%
Public Land Trans.: 65%
Tour Operators: 58%
Lodging: 64%
Attractions: 61%
Airlines: 56%
Car Rental: 22%

* misc. govt. agencies, trade assoc., and misc. Policy customers
Awareness of Research Function by Industry Groups

- States/Regions 100%
- Cruise Lines 100%
- Other * 95%
- Research Firms 93%
- City CVB's 88%
- Visit USA 80%
- Airport Authorities 74%
- AVERAGE 74%
- Tour Operators 67%
- Public Land Trans. 60%
- Lodging 57%
- Airlines 53%
- Attractions 51%
- Car Rental 0%

* misc. govt. agencies, trade assoc., and misc. Policy customers
FIGURE 6

Awareness of Policy Function by Industry Groups

- Other *
- States/Regions: 95%
- Cruise Lines: 80%
- Research Firms: 70%
- City CVB's: 65%
- Visit USA: 65%
- Airport Authorities: 60%
- Average: 57%
- Public Land Trans.: 5%
- Attractions: 40%
- Airlines: 38%
- Lodging: 36%
- Tour Operators: 22%
- Car Rental: 8%

* misc. govt. agencies, trade assoc., and misc. Policy customers
Marketing Function

Awareness

As shown in Figures 7 and 8, with few exceptions, awareness is high for all 20 marketing services.

Awareness is higher for the services provided in the international marketplace as compared with those provided in the United States.

Awareness is exceptionally high for trade shows. Only 5% are not aware of trade shows in the international marketplace and 7% are not aware of Pow Wow - USA.

The programs which most respondents were not aware of include: international congress programs (53% are not aware), gateway reception service (59% not aware) and Disaster Relief Financial Assistance Program (70% not aware).

Visit USA committee members, states/regions, and city CVB’s expressed the highest awareness of the various Marketing programs. This means the highest percentage of respondents in these groups are aware of the majority of these programs. This is not surprising since these groups are the heaviest users of marketing’s programs. (See Appendix D-2,3,4,5.)

Among the various industry groups surveyed, awareness of Marketing’s programs is lowest among airlines and car rental companies. (See Appendix D-2,3.)
FIGURE 7

Awareness of Marketing Programs
International Programs

- Trade Shows: 95%
- Travel Missions: 87%
- Promo Literature: 83%
- Travel Agent Fam: 81%
- Journalist Fam: 79%
- Travel Agent Seminars: 78%
- Mktg Asst/USTTA: 78%
- CIS Centers: 76%
- Trade/Tour Develop.: 71%
- Coop Trade Adv: 70%
- Coop Consumer Adv: 67%
FIGURE 8

Awareness of Marketing Programs in the U.S.

- Pow Wow USA: 93%
- Answering Requests: 68%
- Int'l Tourism Conf: 64%
- Marketing Outreach: 63%
- Mktg US Tourism: 63%
- Tourism USA: 53%
- Int'l Congress: 47%
- Gateway Reception: 41%
- Disaster Relief: 30%
Usage

As would be expected, the programs/services with the highest awareness levels also experience the highest usage levels. And the travel industry groups with the highest awareness also have the highest usage.

Again, usage is highest among internationally offered programs rather than those provided in the U.S. This is exhibited in Figures 9 and 10.

Usage is highest in trade shows, both international (60%) and domestic (Pow Wow USA - 64%) and lowest in Disaster Relief Financial Assistance Program (2%), gateway reception service (5%) and international congress programs (7%).

States and regions take advantage of the largest number of programs both internationally and domestically. (See Appendix D-4,5.)

Value Ratings

Overall, average scores for the twenty marketing programs were all in the high range, as shown in Figures 11 and 12. The lowest score was 4.17 and the highest was 5.39, both of these scores are for programs offered in the U.S.

Not surprisingly, the high scores fell into the trade show categories -- Pow Wow USA scored the high 5.39 and international trade shows averaged 5.26.
FIGURE 9

Usage of Marketing Programs
International Programs

- Trade Shows: 50%
- Mktg Asst/USTTA: 45%
- Promo Literature: 43%
- Travel Missions: 39%
- Travel Agent Fam: 35%
- CIS Centers: 35%
- Travel Agent Seminars: 34%
- Journalist Fam: 32%
- Trade/Tour Develop.: 20%
- Coop Trade Adv: 12%
- Coop Consumer Adv: 11%
FIGURE 10

Usage of Marketing Programs
Programs in the U.S.

<table>
<thead>
<tr>
<th>Program</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow - USA</td>
<td>64%</td>
</tr>
<tr>
<td>Mktg US Tourism</td>
<td>26%</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>23%</td>
</tr>
<tr>
<td>Int 'l Tourism Conf</td>
<td>21%</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>19%</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>18%</td>
</tr>
<tr>
<td>Int 'l Congress</td>
<td>7%</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>5%</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>2%</td>
</tr>
</tbody>
</table>
FIGURE 11

Value of Marketing Programs
International Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Shows</td>
<td>5.26</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>5.12</td>
</tr>
<tr>
<td>Journalist Fam</td>
<td>5.09</td>
</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>5.06</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>4.94</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>4.88</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>4.88</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>4.8</td>
</tr>
<tr>
<td>Coop Trade Adv</td>
<td>4.65</td>
</tr>
<tr>
<td>Coop Consumer Adv</td>
<td>4.54</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.53</td>
</tr>
</tbody>
</table>

Average Value Scores (1 - 6)
FIGURE 12

Value of Marketing Programs
Programs in the U.S.

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow - USA</td>
<td>5.39</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>4.85</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.81</td>
</tr>
<tr>
<td>Mktg US Tourism</td>
<td>4.8</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>4.69</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>4.64</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>4.48</td>
</tr>
<tr>
<td>Int'l Tourism Conf</td>
<td>4.43</td>
</tr>
<tr>
<td>Int'l Congress</td>
<td>4.17</td>
</tr>
</tbody>
</table>
Third and fourth highest scores went to travel agent and journalist familiarization programs at 5.12 and 5.09, respectively. Travel agent seminars and workshops followed close behind with an average score of 5.06.

Rounding out the top ten scores are: travel missions (4.94), trade/tour development and marketing assistance from USTTA foreign offices (4.88 each), disaster relief financial assistance program (4.85), the service of answering requests from the public/trade (4.81), the publication Marketing U.S. Tourism Abroad, and the consumer information service centers in the foreign offices (4.80 each).

Program Evaluation

The following paragraphs hone in on each of the marketing programs for awareness, usage and average value scores. Limited discussion focuses on the industry groups’ responses in each of the program areas.

Co-operative advertising (trade and consumer).

Overall, two-thirds or more of the respondents are aware of co-operative advertising but usage is only at the 11-12% level. The value of this program is rather high at 4.54 (Consumer) and 4.65 (Trade).

States/regions had the highest awareness at 94% and also the highest usage at 32% (trade) and 27% (consumer). The value they place on co-op advertising is high as well -- 5.00 (trade) and 4.67 (consumer).

CVB’s also have very high awareness (81% for trade and
77% for consumer). Usage was not quite as high at approximately 10%. Their value ratings were high at 4.58 (trade) and 4.90 (consumer). All other industry groups had fairly high awareness of co-op advertising (in the 50-60% range) but usage was very low (with the exception of the "other" category at 22% usage).

**Familiarization programs (travel agent and journalist).**

Awareness of the familiarization programs was very high at approximately 80% overall with about one-third using the services. The average value rating was above 5.00 for both programs.

Again, states/regions had the highest awareness (94%) with usage being in the low 70% range. The high awareness and usage makes sense though for this group since they benefit the most from this service -- this is where the program has its greatest impact on the participants (travel agents and journalists). They also rated the value of these programs very high (5.04 for travel agent familiarization programs and 5.12 for journalist).

CVB’s and the Visit USA Committee members scored similarly across the awareness, usage and value ratings. Awareness was high (around 85%) with approximately 40% usage and above 5.00 value ratings. These scores are also not surprising, especially from the CVB’s since they benefit like the states/regions. Usage may not be as high for CVB’s as for states/regions since CVB’s work more closely with the
states in arranging familiarization programs and therefore may not be as aware of USTTA’s involvement. They do place a very high value rating on the programs though (5.22 for travel agent and 5.35 for journalist familiarization programs).

The lodging industry is also very familiar with familiarization programs (84% awareness) with usage ranging between 32% for travel agent programs and 25% for journalist programs. Again, this is to be expected since travel agents and journalists stay in hotels/motels during their trips. A value of approximately 4.85 is placed on these programs by the lodging industry.

**Travel agent seminars and workshops.**

This program has a high awareness level -- 78% overall. Approximately one-third of the respondents take advantage of this program; they also rate its value at a high 5.06.

Among the industry groups, awareness is especially high from states/regions (94%) and Visit USA Committee members (89%). Usage is higher among Visit USA Committee members (62%) than states/regions (47%) but is nonetheless high among these two groups. They also place a high value on this program -- 5.11 for Visit USA Committee members and 5.33 for states/regions.

Awareness of this program is on the high side for the remaining industry groups as well but usage is relatively low. (See Appendix D-2,4.) CVB’s and the lodging industry
do take advantage of it (23% from each group participates in this program). The value rating by each of the groups is also relatively high. (See Appendix D-6,7.)

Trade/tour development programs.

These programs are comprised of the development of U.S. tour products for sale by international wholesalers and retailers. Overall awareness is 71% with moderate usage at 20%. The value given to this program is a high 4.88.

Again, states/regions indicated the highest awareness (85%) of this program, as well as the highest usage at 39%. For those who take advantage of this program, they also indicate it has a high value for them -- the average rating was 4.83.

Awareness is relatively high in the other industry groups but usage is very low. (See Appendix D-2,4.)

Travel missions.

These missions are where U.S. suppliers present and sell the U.S. product in foreign markets. Overall awareness of this program is very high at 87%. Usage is also relatively high at 39% with a high value score 4.94.

Awareness of this program is high across the board of industry groups. (See Appendix D-2.) Usage, however, is not. The heavy users are Visit USA Committee members (56%), states/regions (50%), CVB's (40%) and the lodging industry (36%). These groups also perceive the value of this program to be high with scores ranging between 4.82 (Visit USA
Committee members) to 5.28 (CVB’s).

Trade shows.

These international trade shows include, but are not limited to, Pow Wow - Europe, World Travel Market and International Tourism Exchange (ITB). Trade shows received the highest awareness of all 20 marketing programs at 95% awareness.

This awareness was high across the travel industry. (Appendix D-2.) Usage of trade shows is the highest of the international marketing programs at 60%. The travel industry participating in trade shows most frequently include: states/regions (88%), Visit USA Committee members (75%), CVB’s (67%). Participation was fairly substantial in the other industry groups, with the exceptions of car rental, research/consulting firms and airlines. Of those participating, the value they place on trade shows was high -- generally over 5.00.

Consumer information service (CIS) centers.

These CIS centers are located in the regional offices and provide assistance to the consumer and trade in those regions. Overall awareness of these centers is a high 76% with usage at 35%. The value rating is high at 4.80.

Awareness is high across the board for all industry groups but especially high for states/regions, CVB’s and Visit USA Committee members. Usage, on the other hand, is high only for the three industry groups just mentioned. The
value rating given this service by these three industry groups is approximately 4.90.

Marketing assistance from USTTA foreign offices.

Awareness of this service is high for all industry groups surveyed with an overall awareness level of 78%. Usage averages out at 45% but is significant among states/regions (91%). Approximately half of CVB’s, Visit USA Committee members and the "other" sector also use this service. The value placed on this service overall is 4.88.

Promotional literature.

Awareness of this service is very high at 83% with Visit USA Committee members and states/regions jumping above that at the 94% level. Usage overall is 43% with the strongest usage coming from states/regions (74%) and Visit USA Committee members (68%). The value of this service averages 4.53.

The following group of nine services are provided in the United States rather than in the international marketplace. With the exception of Pow Wow - USA, overall awareness of these programs was not as high as the internationally provided programs/services and usage is very low. The details for each program are described below.

International congress programs.

This program entails soliciting international convention/congress selection of U.S. venues. Overall, nearly half (47%) of the respondents are aware of it, with
the highest awareness coming from states/regions (71%).
Usage of the program is very low -- 7% overall. The industry groups using this program the most are CVB’s (15%) and states/regions (11%). The overall value rating is 4.17.

**Gateway reception service.**

This service is the provision of travel assistance to international visitors at major airports. Only 41% of the respondents are aware of this service, with the highest awareness from states/regions (57%), followed by the lodging industry, public land transportation, airports and "other" (approximately 50% each). The highest usage is from airports, as would be expected since this service is provided there, but it is low at 18%. The value the airport authorities placed on this service is 5.50.

**Disaster relief financial assistance program.**

This program provides financial assistance for international promotion needs of states having experienced a disaster. This program is new to USTTA, beginning in fiscal year 1991. The first applications were received in June 1991. For this reason, awareness is rather low with less than a third (30%) of the respondents aware of the program. Since this program applies for destinations, it is predictable that awareness would be high for states/regions (83%).

Usage of this program is also very low and is not surprising since it is restrictive in nature. Overall usage
is 2% but for states/regions, usage is 6%. The value placed on this program was 4.85, with states/regions slightly lower at 4.50.

Marketing outreach programs.

Various seminars, workshops and conferences are the outreach programs included in this category. More than three-fifths (63%) of the respondents are aware of these programs but usage is a minimal 18%. The value placed on these programs though is still fairly high at 4.48.

There are several industry groups for which awareness of these programs is very high -- states/regions (100%) and CVB’s and research/consulting firms (77% each). Usage is extremely high for the states/regions (71%) where they each value the program at 4.26. Usage is minimal from CVB’s (26%) and research firms (19%); both groups value this program at approximately 4.30.

International tourism conference.

This conference is held every February in Washington, D.C. and has an awareness level of 64%, highest among states/regions (91%), CVB’s (89%), research firms (83%) and "other" (94%). Overall usage/attendance is fairly low at 21% but high from states/regions (69%); CVB’s (40%), "other" (41%) and research firms (32%) follow. The value of this conference from these four industry groups ranges from 3.86 ("other") to 4.67 (research firms), with the overall value score being 4.43.
Pow Wow - USA.

This trade show has an exceptionally high awareness level across the board; the overall average is 93%. Usage (or attendance) is substantial at 64% overall but 94% from states/regions. CVB’s are also high participants (78%), followed by Visit USA Committee members and hotels/motels (70% each). The value of this trade show also exhibits a strong appeal -- overall value rating is 5.39.

Marketing U.S. Tourism Abroad.

This is a manual which lists the co-operative marketing programs in USTTA markets, in addition to other research data on the major market countries. This publication has not been updated in book form since fiscal year 1990. More recent data is available but not in this publication. In the past, this manual has been distributed to attendees at Pow Wow - USA.

Awareness of this publication is substantial at 63% with the strongest showing from states/regions (100%), "other" (81%), CVB’s (77%) and research firms (74%). As would be expected, usage is highest among states/regions (80%), followed by "other" at 50%. The overall value rating given to this publication is 4.80 but lower (4.42) from the group who uses it the most, states/regions.

Tourism USA: Guidelines for Tourism Development Manual

This publication is a handy tool for tourism development and has recently been updated. It is often used
as a textbook in tourism courses throughout the United States' higher education system.

Awareness is fairly high at 53% overall but 83% for states/regions and 70% for CVB’s. Overall usage is a low 19% but a substantial 54% for states/regions. The "other" category also has fairly high usage (41%), with CVB’s and research firms following at 33% and 32%, respectively.

The value placed on this manual is 4.69 overall but higher for states/regions (4.94). The "other" group who had fairly high usage gave it a much lower value rating of 3.86. CVB’s and research firms were more positive with value ratings of 4.81 and 5.00, respectively.

Service of answering information requests from the trade and public.

Approximately two-thirds of the respondents are aware of this service overall with states/regions having the highest awareness at 85%. This service is used overall by approximately one fourth of the respondents, with states/regions taking advantage of it the most (44%). Of those who use this service, the value rating they place on it is 4.81.

Quality of Marketing Programs

As shown in Figure 13, the overall average was 4.28. Scores ranged at the low end of 3.50 from receptive tour operators to a high score of 4.50 from U.S. international airport authorities.
FIGURE 13

Quality Rating of Marketing by Industry Groups

<table>
<thead>
<tr>
<th>Industry Group</th>
<th>Average Quality Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airport Authorities</td>
<td>4.5</td>
</tr>
<tr>
<td>City CVB's</td>
<td>4.48</td>
</tr>
<tr>
<td>Visit USA</td>
<td>4.43</td>
</tr>
<tr>
<td>Cruise Lines</td>
<td>4.4</td>
</tr>
<tr>
<td>Public Land Trans.</td>
<td>4.36</td>
</tr>
<tr>
<td>AVERAGE</td>
<td>4.28</td>
</tr>
<tr>
<td>Lodging</td>
<td>4.13</td>
</tr>
<tr>
<td>Research Firms</td>
<td>4.08</td>
</tr>
<tr>
<td>States/Regions</td>
<td>4.06</td>
</tr>
<tr>
<td>Attractions</td>
<td>3.93</td>
</tr>
<tr>
<td>Airlines</td>
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</tr>
<tr>
<td>Car Rental</td>
<td>3.75</td>
</tr>
<tr>
<td>Other *</td>
<td>3.79</td>
</tr>
<tr>
<td>Tour Operators</td>
<td>3.5</td>
</tr>
</tbody>
</table>

* misc. govt. agencies, trade assoc., and misc. Policy customers.
Satisfaction with Marketing Programs

Overall, respondents are satisfied with USTTA’s Marketing programs. Approximately one-third (32%) of the respondents were very satisfied and 56% were somewhat satisfied. Only 12% were not satisfied.

Of the various industry groups surveyed, the Visit USA Committee members were the most satisfied with USTTA’s marketing programs and services in meeting their needs -- 41% were very satisfied and 48% were somewhat satisfied.

City CVB’s also had a very high satisfaction level with 38% being very satisfied, 56% somewhat satisfied and only 6% not satisfied.

Comments/Suggestions for Improvement

When asked for comments/suggestions for improving USTTA’s marketing programs and services to increase their usefulness to the respondents, approximately one-fourth of the suggestions were for a specific program or promotion. These came mainly from Visit USA Committee members and airport authorities.

There were also approximately one-fifth of the respondents who commented on the budget situation -- that USTTA’s budget should be increased or that the budget for specific existing programs should be increased, e.g., through increasing what USTTA spends on co-operative programs. The majority of these comments came from Visit USA Committee members, states/regions, cities and
research/consulting firms.

The same number of respondents also suggested that USTTA’s assistance be more targeted or regionalized rather than promoting the U.S. as if it were one destination. CVB’s had suggested this often in conjunction with other specific program suggestions.

Less than one-fifth (15%) of the respondents suggested that USTTA be more responsive to their needs, e.g., not being put on hold, returning phone calls, producing programs that are appropriate or specific enough for their particular needs.

Approximately one-fifth had other miscellaneous comments or suggestions.

Industry Methods

Of the ten activities offered in the questionnaire for organizations to use to promote international travel to the U.S., all ten proved to be almost equally popular activities among the respondents. Direct mail and sales calls are also popular activities conducted by a number of the industry groups.

For each of these activities, Visit USA Committee members were the heaviest users (between 35-59%). Among the other industry groups, CVB’s and hotels/motels were the next most active in using these activities to promote international travel to the United States.

A look at these three industry groups’ usage of USTTA
services in these program areas reveals high usage of USTTA overall. The only program exceptions are for trade and consumer advertising where USTTA usage is relatively low, particularly for hotels/motels.

Research Function

Awareness

Overall awareness is fairly equal among all research programs (services/publications) with the possible exception of the Summary and Analysis report having an overall awareness of 84%. The others ranged between 61% for Pleasure Market studies to 75% for the Outlook report. (See Figure 14.)

Awareness of Research publications was extremely high for states/regions with many publications having 97% awareness; the Summary and Analysis had 100% awareness.

Not surprisingly, research firms also had high awareness of all of USTTA’s research publications.

Usage

Compared to the Marketing programs where usage was in the range of 2 - 64%, usage is very high for the Research publications, averaging in the 30 - 40% range. (See Figure 15.)

Usage of the Research publications was fairly consistent. However, the Summary and Analysis report is used by nearly twice as many as use the Pleasure Travel Market studies (57% vs. 29%, respectively).
FIGURE 14

Awareness of Research Programs

- Summary & Analysis: 84%
- Outlook: 75%
- Recap: 73%
- Answering Requests: 72%
- Economic Impact: 70%
- Canadian Travel: 69%
- In-Flight Survey: 64%
- Pleasure Market: 61%
FIGURE 15

Usage of Research Programs

- Summary & Analysis: 57%
- Outlook: 45%
- Recap: 42%
- Economic Impact: 37%
- Canadian Travel: 33%
- Answering Requests: 31%
- In-Flight Survey: 31%
- Pleasure Market: 29%

[Bar chart showing usage percentages for various categories]
The **Pleasure Travel Market** studies, **In-Flight Survey** and **Canadian Travel to the U.S.** are used by approximately one-third or slightly less of the respondents. The same applies for the service of answering information requests.

Used slightly more are the **Outlook** (45%), **Recap** (42%) and **Impact of Foreign Visitor Spending on State Economies** (37%). As mentioned above, the **Summary and Analysis** is used the most -- by 57% of the respondents.

The states/regions are the heaviest users of Research data with two-thirds or more of this group using the publications. The highest usage was the **Summary and Analysis** with 91% usage.

**Value Rating**

As presented in Figure 16, the average value ratings given for all Research publications/services were extremely tight. The highest value was given to the **Pleasure Travel Market** studies (4.84) followed closely by the **Canadian Travel to the U.S.** and the **Outlook** with scores of 4.83 each. The **Summary and Analysis** was also not far behind at 4.81. Rounding out the scores were: answering information requests (4.79), **Impact of International Visitor Spending on State Economies** (4.78), **In-Flight Survey** (4.76) and **Recap** (4.66).

Visit USA Committee members valued the Research publications with higher scores than any of the other industry groups surveyed with a high score of 5.17 (**Pleasure Market**) to 4.77 (**Recap**).
FIGURE 16

Value of Research Programs

- Pleasure Market: 4.84
- Canadian Travel: 4.83
- Outlook: 4.83
- Summary & Analysis: 4.81
- Answering Requests: 4.79
- Economic Impact: 4.78
- In-Flight Survey: 4.76
- Recap: 4.66

Average Value Scores (1 - 6)
Program Evaluation

The following hones in on each of the publications/services.

Answering information requests from the public and trade.

Nearly three-fourths of the respondents (72%) indicated awareness of this service. Just under a third (31%) actually use this service giving it a high value rating of 4.79.

Awareness and usage is highest among states/regions (91% aware, 66% use). Awareness is also high among airports (87%), research firms (80%), Visit USA Committee members (78%) and CVB’s (69%). Among these groups, usage is highest for Visit USA Committee members (46%) and approximately 26% for the other three groups. All industry groups mentioned here gave high value ratings to this service, ranging from 4.15 (research firms) to 4.95 (Visit USA Committee members).

In-flight survey.

Overall, 64% of respondents indicated they were aware of USTTA’s In-Flight Survey with 31% of those using it. Nearly all states/regions are aware of this survey -- a resounding 97%. Following that is 84% awareness by research firms and 81% by airport authorities. Usage is high by all three of these groups (64% for states/regions, 63% research firms and 56% airport authorities). Awareness of this publication by CVB’s was 74% with a third of them using it.
The value placed on this survey is 4.76 overall with scores for the above three groups at 4.33 (states/regions), 4.50 (airport authorities) and 4.68 (research firms).

**Pleasure travel market studies.**

These studies have the lowest awareness of all research publications but they are still high at 61% overall. They also have the lowest usage at 29%. However, they received the highest overall value rating at 4.84.

States/regions and research firms had the highest awareness of this publication (88% each); usage was also highest among these two groups (77% for states/regions and 59% for research firms). Awareness of this publication by CVB’s was 73% with a third of them using it. Awareness by the other groups was in the 50% range with varying usage.

Of the three groups who use this research the most, they place a high value on it. For CVB’s, the value rating averaged 4.97, for states/regions it was 4.72, and for research firms it was 4.68.

**Summary and analysis of international travel to the U.S.**

This report has the highest awareness (84%) and usage (57%) of all research publications. The value is also very high at 4.81.

States/regions had 100% awareness followed by research firms with 94% awareness. All other industry groups also had high awareness. Usage, on the other hand, is extremely
high for states/regions (91%) while less for research firms (72%). These two groups also rated the value of this research at high levels -- 4.62 (states/regions) and 4.81 (research firms).

**Canadian travel to the U.S.**

More than two-thirds of the respondents (69%) are aware of this report, with one-third using it and valuing it at 4.83.

Those who are most aware of this report are states/regions (97%), research firms (90%), CVB’s (86%) and hotels/motels (80%). Of these groups, states/regions use the data the most (85%). More than half of the research firms (59%) and CVB’s (55%) use the data; a third of the hotels/motels use it.

The value of this data is extremely high for states/regions -- 5.07. The other groups gave good value ratings as well.

**Recap of international travel to and from the U.S.**

Nearly three-fourths (73%) of the respondents are aware of this report with an incredible 42% using it. For those using it, the value they give it is a high 4.66.

Awareness is highest among states/regions (97%), CVB’s and research firms (86% each), airport authorities (83%) and hotels/motels (78%). These groups all have high usage of the report as well with states/regions using it the most (79%), followed by CVB’s and research firms (53% each),
airport authorities (50%) and hotels/motels (40%).

The value these groups placed on this publication ranged between 4.43 (airport authorities) to 4.74 (research firms).

**Impact of foreign visitor spending on state economies.**

Awareness of this publication is 70% overall with nearly all (97%) states/regions being aware of it. CVB’s and research firms also have very high awareness of this publication (86% each).

Usage of this publication is high at 37% overall. For states/regions, usage is extremely high at 85%; this would be expected since the research deals specifically at the state level. Other heavy users include CVB’s (51%) and research firms (49%).

The overall value placed on this publication is 4.78 with states/regions indicating slightly higher value at 4.93.

**Outlook for international travel to and from the U.S.**

This research is also very popular among the respondents, which is not surprising since it deals with forecasts of international travel. Three-fourths of all respondents indicated awareness and 45% said they used it. Awareness and usage is extremely high for states/regions (97% aware, 82% use) and research firms (94% aware, 75% use). The value of this research also indicates approval -- 4.83 overall rating.
Overall Satisfaction with Research Services/Publications

The majority (88%) of respondents indicated they were satisfied with the research publications/services in meeting their needs; a third (34%) were very satisfied and more than half (54%) were somewhat satisfied. Only 12% indicated they were not satisfied.

The other industry groups had nearly similar breakdowns in the levels of satisfaction.

Comments/Suggestions for Improvement

For those who were only somewhat satisfied or not satisfied, the comments/suggestions will be particularly meaningful.

Mentioned most often (by two-fifths of the respondents - 41%) were complaints about USTTA’s research methodology or specific suggestions for the types of data that should be collected.

Just under a fifth of the respondents commented that USTTA’s data is out of date or too old by the time it is distributed and an equal number of respondents stated that the data is not as accessible or as easy to obtain as it should be. A fifth of the respondents fell into the "other" mentions category.

The Visit USA Committee members were concerned about the methodology more than anything else but not too far behind was their complaint about the timeliness. Research firms were more forgiving on the timeliness of USTTA data.
States/regions and CVB’s were more concerned about the methodology (probably to make the data more state/city-specific).

Research Sources Used by Industry

Cited most often as research sources they use when developing their international marketing strategies were: state tourism offices (27%), USTTA (24%), CVB’s and internal sources (21% each), national tourist offices (16%) and private consulting (11%). Only 6% cited other government sources and only 3% admitted to no sources.

In analyzing how the industry groups responded to each of the research sources, Visit USA Committee members are the heaviest users of all of these sources with approximately one-fourth to one-third using these sources (including the mention of no source).

CVB’s are also heavy users of state tourism offices and USTTA. Hotels/motels use a variety of research sources, less of USTTA than CVB’s, NTO’s, state tourism offices, other Government agencies and private consulting firms and internal sources.

Policy Function

Awareness

Compared with the Marketing programs and Research publications, awareness of the Policy activities was much less. Overall awareness ranged from a low of 13% for Minority Tourism Development to a high of 50% for World’s
Fairs and International Expositions as displayed in Figure 17.

While the activities performed by the Office of Policy at USTTA have widespread effect, the "customers" of the Office of Policy are relatively limited. Therefore, the awareness levels for these activities, while somewhat low, is still impressive.

Besides the World’s Fairs/International Expositions, approximately half of the respondents are aware of the U.S.-Canada Free Trade Agreement (48%) and Bilateral Tourism Agreements (46%).

A third or more of the respondents are also aware of GATT (42%), Facilitation Policies (41%), Bilateral Trade Agreements and Side Letters (36%), and Rural Tourism and the Tourism Policy Council (33% each).

Among the various industry groups, states/regions expressed the highest awareness levels for nearly all eleven of Policy’s activities. (See Appendix D-11.)

Value Rating

As shown in Figure 18, the overall value ratings placed on these activities were fairly high with most being in the high 4’s. The highest rating can be found in Facilitation Policies with a 5.25. The lowest ratings were given to rural tourism (4.15) and minority tourism development (4.18).
Awareness of Policy Activities

- World's Fairs/Exp.: 50%
- US/Canada Free Trade: 46%
- Bilateral Agreements: 46%
- GATT: 42%
- Facilitation Policy: 41%
- Side Letters: 36%
- Rural Tourism: 33%
- Tourism Policy Council: 33%
- Air Transport Neg.: 25%
- EC '92: 21%
- Minority Tourism: 13%
FIGURE 18

Value of Policy Activities

<table>
<thead>
<tr>
<th>Facilitation Policy</th>
<th>5.25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Transport Neg.</td>
<td>4.94</td>
</tr>
<tr>
<td>Bilateral Agreements</td>
<td>4.89</td>
</tr>
<tr>
<td>Side Letters</td>
<td>4.84</td>
</tr>
<tr>
<td>US/Canada Free Trade</td>
<td>4.79</td>
</tr>
<tr>
<td>Tourism Policy Cncil</td>
<td>4.67</td>
</tr>
<tr>
<td>EC '92</td>
<td>4.56</td>
</tr>
<tr>
<td>GATT</td>
<td>4.53</td>
</tr>
<tr>
<td>World's Fairs/Exp.</td>
<td>4.38</td>
</tr>
<tr>
<td>Minority Tourism</td>
<td>4.18</td>
</tr>
<tr>
<td>Rural Tourism</td>
<td>4.15</td>
</tr>
</tbody>
</table>

Average Value Scores (1 - 6)
Also receiving high value scores were Air Transport Negotiations (4.94), Bilateral Tourism Agreements (4.89) and Bilateral Trade Agreements and Side Letters (4.84), U.S.-Canada Free Trade Agreement (4.79) and the Tourism Policy Council (4.67).

In nearly all cases, Visit USA Committee members rated the Policy activities at or above the average scores. Other industry group scores fluctuated above and below the averages. (See Appendix D-12.)

Activity Evaluations

The following hones in on each of the policy activities.

Bilateral tourism agreements.

These agreements are legally binding international agreements meant to assist the U.S. government in dealing with other governments on tourism-related issues. The bilaterals generally set up rules for establishing and operating official tourism promotion offices; principles for working to facilitate the movement of travelers between countries; and guidelines for the exchange of statistics and information on education, training, and tourism investment opportunities. Eight bilateral agreements have been signed.

Nearly half (46%) of the respondents were aware of this activity overall. Research firms and states/regions had the highest awareness levels at 63% and 61%, respectively.
Awareness of this activity by Visit USA Committee members, CVB’s, airport authorities and hotels/motels was just under 50%.

The lodging industry rated this activity the highest value at 5.10, followed by CVB’s (4.93), research firms (4.86), states/regions (4.83) and Visit USA Committee members (4.78).

**Bilateral trade agreements and tourism side letters.**

The bilateral tourism agreements mentioned above provide the U.S. government and its partner a forum for discussing any tourism problem, while the trade agreements help eliminate barriers to the tourism industry for doing business. The side letters guarantee that trade in tourism will receive the full benefit of the new trade agreements as the affected countries open their markets.

Less respondents were aware of this activity than the tourism agreements mentioned above. More than a third (36%) are aware overall with states/regions and research firms being most aware (47% and 46%, respectively). Airport authorities (42%), CVB’s (39%) and Visit USA Committee members (34%) also expressed substantial awareness.

For these industry groups most aware, the value ratings ranged between 4.45 (Visit USA Committee members) and 4.74 (CVB’s).

**Rural tourism initiative.**

This initiative works to develop and promote tourism in
rural areas. A third of the respondents were aware of this overall but states/regions had 85% awareness. Also expressing very high awareness were research firms and CVB’s with half of them aware. It is not surprising that states/regions (and CVB’s) had high awareness since it is in their jurisdiction that the rural areas are located and subsequently benefit from this initiative. It would be high for CVB’s since this initiative works with small rural cities and towns, in addition to large urban areas.

The value rating given to this activity is not as high as others but it is still above the mid-point of 3.50. States/regions rated it a 4.12 while CVB’s only rated it a 3.61. Research firms gave it a higher value rating at 4.39.

**General agreement on tariffs and trade (GATT):**

**Negotiations on services.**

USTTA participates in developing the U.S. negotiating position on GATT and chairs the Tourism Working Group.

About two-fifths (42%) of the respondents are aware of it. Awareness was highest among airport authorities (58%) and states/regions and research firms (56% each). Visit USA Committee members, the lodging industry and CVB’s expressed substantial awareness as well (43%, 41% and 34%, respectively).

Of these groups, airport authorities, the group with the highest awareness, also provided the lowest value rating to this activity -- 3.64. The other groups rated the value
at approximately 4.40 with the exception of Visit USA Committee members at 4.85.

**EC '92 interagency task force.**

On this task force, USTTA participates in tourism-related activities with respect to creating a single European Community market; this includes developing a U.S. policy response to EC-92 programs, directives and regulations.

Awareness of this task force is very low at 21% overall. The industry groups with the highest awareness are states/regions with 42% indicating awareness. This is followed by airport authorities (29%), research firms (27%) and CVB’s (24%) and the lodging industry (22%).

For those aware, the value placed on this activity was fairly minimal. The highest value came from the lodging industry at 4.53 but the lowest value came from the group with the highest awareness -- states/regions valued this activity at 4.00.

**U.S.-Canada free trade area agreement.**

USTTA implements the tourism provisions of this agreement. Nearly half of the respondents (48%) indicated awareness of this agreement. The highest awareness came from states/regions and research firms where two-thirds were aware. The lodging industry (58%), CVB’s (57%) and airport authorities (55%) and train/bus (49%) also had strong awareness levels.
Value ratings by these groups were rather high for this agreement with the lodging industry (5.03) and states/regions and train/bus giving 5.00 ratings, respectively. Research firms (4.80) and CVB’s (4.62) also rated the value high. Airport authorities did not rate it as high (4.15).

**Minority tourism development.**

USTTA joined with the Minority Business Development Agency in July 1990 to stimulate minority business development through international tourism, to increase awareness of minority historical and cultural tourist sites, and to facilitate related business opportunities for minority owned enterprises in the tourism sector.

Awareness of this activity was very low, with only 13% overall awareness. At 30%, the states/regions expressed the highest awareness, followed by CVB’s (23%) and research firms (21%).

The value given by these groups to this activity was mixed. CVB’s only rated it a 4.05, research firms a 4.56 and states/regions a 4.89.

**Tourism policy council.**

This council coordinates Federal agency policies/programs that have a significant effect on tourism. The Secretary of Commerce serves as Chairman of this council and the Under Secretary of Commerce for Travel and Tourism serves as Vice Chairman and Chairman pro tem.
Overall awareness was only 33% but more than half of states/regions and research firms expressed awareness (56% and 55%, respectively). CVB’s also had high awareness at 45%. The Visit USA Committee members and airport authorities only had 19% awareness. The overall value rating of 4.67 was equally stated among the various industry groups.

World’s fairs and international expositions.

USTTA is the agency responsible for administering the public law which provides for Federal Government recognition of and participation in international expositions (world’s fairs) held in the U.S. Half of the respondents indicated awareness of this activity. Awareness higher than this was found among Visit USA Committee members (57% awareness) and airport authorities (55%). All other industry groups had awareness just under 50%.

The value given to this activity by the various industry groups was widespread. Visit USA Committee members valued it at 4.86 but states/regions only valued it at 3.29.

Facilitation policies.

These policies include providing support for Visa Waiver Pilot Program, Advanced Passenger Information Service, machine-readable passports, Immigration and Naturalization Service pre-inspection, etc. Awareness of these activities was 41% overall. Airport authorities, who have the most to gain by these polices, were the most aware
at 65%. More than half of the Visit USA Committee members and states/regions were aware of these policies (55% and 53%, respectively).

The value placed on these policies is extremely high -- over 5.00. Visit USA Committee members and states/regions had scores around 5.28 and airport authorities were at 5.12.

**Air transport (CIVAIR) negotiations.**

In these negotiations, USTTA coordinates with other U.S. agencies to have tourism interests promoted. Only a fourth of the respondents were aware of these negotiations overall. Airport authorities had the highest awareness at 40%. Research firms (32%), Visit USA Committee members (30%) and states/regions (29%) followed.

The value these groups placed on these negotiations was fairly high -- Visit USA Committee members (4.94), states/regions (4.88), research forms (4.75) and airport authorities (4.38).

**Overall Satisfaction**

The overwhelming majority (84%) expressed satisfaction with USTTA’s Policy activities -- 23% were very satisfied and 61% were somewhat satisfied. Only 15% were not satisfied.

States/regions and research firms were the most satisfied (96% and 92%, respectively); looking at the inverse, only 4% of states/regions and 8% of research firms were not satisfied.
Suggestions for Improvements

When asked where improvements could be made, such items as improving the process for international visitors at airports and continuation of the Visa Waiver program were mentioned most often.

Important Policy Issues for Industry

Quite a number of miscellaneous policy issues were listed as important to the respondents' organizations. The key issues include easing the barriers to entry (facilitation policies), visa waiver and bilateral tourism agreements.

USTTA Funding/Government Involvement

In each of the three function areas, respondents were asked if they thought the U.S. Government should expend money on those particular program areas, i.e., promoting international tourism to the U.S. (marketing), collecting international travel/tourism statistics and research information (research), or on international tourism policy issues (policy).

The affirmative responses were nearly unanimous. For promoting international tourism to the U.S., nearly everyone agreed -- 82% strongly agreed and 17% agreed; only 1% disagreed. This strong agreement was felt throughout the various industry groups.

For collecting international travel/tourism statistics and research information, nearly all agreed to some degree;
two-thirds (68%) strongly agreed and just under a third (30%) agreed.

Research firms, states/regions and CVB’s all had very high percentages of respondents who agreed to this notion strongly (88% for research firms, 85% for states/regions and 83% for CVB’s).

Disagreement was insignificant or non-existent for most industry groups.

For international tourism policy issues, the overwhelming majority (98%) agreed (57% strongly agreed and 41% agreed).

The various industry groups expressed this same sentiment with varying degrees of "strong" agreement. Research firms held the strongest degree of agreement with 73% strongly agreeing that the U.S. Government should be involved with policy issues.

At the end of the questionnaire, respondents were asked one last time if they thought the U.S. Government should make expenditures on programs related to international tourism to the U.S. Again, the overwhelming majority (98%) said yes. Only 2% said no.

For those who agreed, they were then asked how they thought USTTA should be funded. Respondents could reply by checking more than one of these choices.

More than three-fourths of them (77%) indicated Government appropriations, the current method of funding.
An equal number said facilitation fee (37%) and departure fee (36%). Bed tax received 14% of the vote and "other" received 8%.

For all industry groups, appropriations received the highest percentage of votes among the four approaches. States/regions gave it the highest percentage of votes (91%), followed by research firms (85%), Visit USA Committee members (81%) and CVB’s (79%). Appropriations received the smallest percentage of votes, albeit still strong, from airport authorities (52%) and train/bus (55%).

Departure taxes and facilitation fees received the next highest votes but the industry groups were mixed on which one they gave the most votes. For Visit USA Committee members, states/regions, airport authorities and tour operators, the votes were close in each category. For CVB’s, research firms, train/bus, attractions, the vote swayed in favor of facilitation fees. For hotels/motels, the vote was slightly stronger for departure fees.

The bed tax was least popular among "other" (0%), CVB’s (3%), tour operators (5%), states/regions (7%) and hotels/motels (10%). Not surprisingly, it was most popular among airport authorities (30%).
Travel Industry Group Analyses

This section looks at each of the thirteen travel industry groups surveyed and their responses. This is designed for those who want to review the results by group. For some groups, the number of responses is small so only an overview is given.

Visit USA Committee Members

Out of 726 Visit USA Committee members/organizations contacted, a total of 264 organizations responded, resulting in a 36% response rate. The highest responses came from the committee members in Japan (67%), Australia (53%), Switzerland (50%), Germany (43%), the United Kingdom (42%), Sweden (42%), Canada (41%), New Zealand (40%), Netherlands (39%), Denmark (39%) and Ireland (36%). The lowest response rate came from Italy (10%) and South America (21%).

Importance of and Involvement in International Tourism

As would be expected from the nature of this group, international tourism is of importance to them -- 91% stated it was very important and 9% said somewhat important -- and all are involved with international tourism.

When asked if they work with state tourism offices, international tourism promotion organizations or city CVB’s when dealing with the international market, 92% said yes.

When asked if they are aware of USTTA, 97% indicated they were. Surprisingly, though, 3% said they were not aware of USTTA.
Awareness of USTTA’s three function areas reveals very high awareness of Marketing (91%), followed by Research (80%) and Policy (65%).

Marketing

For the services offered in the international marketplace, awareness was extremely high by Visit USA Committee members. In this group of services, awareness ranged from 99% for trade shows to 70% for cooperative consumer advertising. (See Figure 19.)

For the services/programs offered in the United States, however, awareness was considerably lower, with the exception of Pow Wow - USA (98% awareness). For this group of programs/services, awareness ranged from 21% for disaster relief financial assistance program to 66% for the service of answering information requests from the trade and public. (See Figure 20.)

Usage followed the same pattern of awareness. For those programs/services where awareness was high, heavy usage also resulted. (See Figures 19 and 20.)

When asked about the value of those programs/services they use, the majority of marketing programs were given high ratings, as shown in Figures 21 and 22. Pow Wow - USA received the highest average value score of 5.57 and international congress programs received the lowest at 4.00.
Visit USA Committee Awareness/Usage Int'l Marketing Programs

- Trade Shows
- Promo Literature
- Travel Missions
- Travel Agent Seminars
- CIS Centers
- Travel Agent Fam
- Journalist Fam
- Mtg Asst/USTTA
- Trade/Tour Develop.
- Coop Trade Adv
- Coop Consumer Adv

0% 50% 100%
Awareness Usage
Visit USA Committee
Awareness/Usage U.S. Marketing Programs

- Pow Wow - USA: 70% Awareness, 50% Usage
- Answering Requests: 27% Awareness, 0% Usage
- Mktg US Tourism: 52% Awareness, 45% Usage
- Marketing Outreach: 48% Awareness, 40% Usage
- Int'l Tourism Conf.: 5% Awareness, 0% Usage
- Tourism USA: 10% Awareness, 4% Usage
- Int'l Congress: 4% Awareness, 4% Usage
- Gateway Reception: 2% Awareness, 0% Usage
- Disaster Relief: 104% Awareness, 100% Usage

Awareness
Usage
Visit USA Committee
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Value Score</th>
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<td>Trade Shows</td>
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</tr>
<tr>
<td>Travel Agent Fam</td>
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</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>5.11</td>
</tr>
<tr>
<td>Journalist Fam</td>
<td>4.99</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>4.98</td>
</tr>
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<td>Mktg Asst/USTTA</td>
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<td>Coop Trade Adv</td>
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</tr>
<tr>
<td>Promo Literature</td>
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</tr>
<tr>
<td>Coop Consumer Adv</td>
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</tr>
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</table>
FIGURE 22

Visit USA Committee
Value of U.S. Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow USA</td>
<td>5.57</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>5.5</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>5.13</td>
</tr>
<tr>
<td>Marketing US Tourism</td>
<td>5.08</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.85</td>
</tr>
<tr>
<td>Int'l Tourism Conf</td>
<td>4.82</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>4.61</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>4.38</td>
</tr>
<tr>
<td>Int'l Congress</td>
<td>4.0</td>
</tr>
</tbody>
</table>

1 to 7 Scale
When asked about the overall quality of USTTA’s marketing program, Visit USA Committee members rated the value a 4.43. This is a slightly higher rating than the overall average of 4.28.

Overall satisfaction with the marketing programs by this group was high -- 41% indicated they were very satisfied and 48% were somewhat satisfied. There were 12% who were not satisfied.

Some comments/suggestions were given to improve USTTA marketing programs/services. Approximately a third gave suggestions for specific programs or promotional efforts. More than a fourth said that USTTA’s budget should be increased or that the budget for specific existing programs should be increased, e.g., through increasing what USTTA spends on co-operative programs. Other responses which were given include: making assistance more targeted or regionalized and to be more responsive.

**Research**

Awareness is high for all eight services/publications offered by the Office of Research. Most popular are the Summary and Analysis of International Travel to the U.S. (85%) and the service of answering information requests from the public and trade (78%). The lowest awareness level is around 50% which is still high; included in this category are the In-Flight Survey, Pleasure Travel Market studies, Canadian Travel to the U.S., and Impact of International
Visitor Spending on State Economies. (See Figure 23.)

Usage of the Summary and Analysis is very high (60%) and the service of answering information requests is at 46%. Usage of the other publications ranges from 12% for the Canadian Travel to the U.S. to 34% for the Recap and Outlook. (See Figure 23.)

For those who use these publications/services, the value ratings they placed on them were extremely high, ranging from 4.77 (Recap) to 5.17 (Pleasure Travel Market). (See Figure 24.)

Overall satisfaction with Research’s services/publications was high -- a third (33%) were very satisfied and 52% were somewhat satisfied. There were 15% of the Visit USA Committee members, however, who were not satisfied.

When asked for suggestions or comments on what can be done to help them better understand the international traveler to the U.S., Visit USA Committee members suggested that Research improve/change the research methodology (31%), improve the timeliness of the data (24%) and improve the distribution of the data (21%).

Policy

Overall awareness of the eleven policy activities was minimal, as demonstrated in Figure 25. The most familiar activities include: World’s Fairs and International Expositions (57%), facilitation policies (55%) and bilateral
FIGURE 23

Visit USA Committee
Awareness/Usage Research Publications

Summary & Analysis 60% 65%
Answering Requests 40% 70%
Recap 24% 64%
Outlook 24% 82%
Economic Impact 25% 51%
Pleasure Travel 21% 52%
In-Flight Survey 19% 50%
Canadian Travel 12% 50%

0% 50% 100%

Awareness  Usage

109
Visit USA Committee
Value of Research Publications

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasure Travel</td>
<td>5.17</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>5.1</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>5.08</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>5.04</td>
</tr>
<tr>
<td>Outlook</td>
<td>4.96</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.95</td>
</tr>
<tr>
<td>Summary &amp; Analysis</td>
<td>4.94</td>
</tr>
<tr>
<td>Recap</td>
<td>4.77</td>
</tr>
</tbody>
</table>
FIGURE 25

Visit USA Committee
Awareness of Policy Activities

- World's Fairs/Exp.: 57%
- Facilitation Policy: 55%
- Bilateral Agreements: 47%
- GATT: 43%
- Side Letters: 34%
- Air Transport Neg.: 30%
- US/Canada Free Trade: 30%
- Rural Tourism: 20%
- Tourism Policy Cncil: 19%
- EC '92: 17%
- Minority Tourism: 5%
tourism agreements (47%). The lowest awareness was for minority tourism development (5%).

For those activities that the Visit USA Committee members are aware of, the value they placed on them was fairly high, ranging from 5.3 for facilitation policies to 4.3 for minority tourism development. This is displayed in Figure 26.

Overall satisfaction with USTTA’s policy activities in meeting their needs was high -- 24% were very satisfied and 57% were somewhat satisfied. There were, however, 19% who were not satisfied.

**USTTA Funding**

When asked about funding issues specific to each of the three function areas, virtually all Visit USA Committee members felt that the U.S. Government should be involved with and expend money on promoting international tourism to the U.S. (99%), on collecting international travel/tourism statistics and research information (97%), and on international tourism policy issues (97%). Their overall assessment of the funding issue fell in line -- 98% believe that the U.S. Government should spend money on programs related to international tourism to the U.S.

When asked how they thought USTTA should be funded, the majority (81%) thought appropriations from U.S. general tax revenues was the best method. A third indicated departure fees on all individuals leaving the U.S., 29% said
Visit USA Committee
Value of Policy Activities

Facilitation Policy: 5.27
EC '92: 5.23
Air Transport Neg.: 4.94
World's Fairs/Exp.: 4.86
GATT: 4.85
Bilateral Agreements: 4.78
Tourism Policy Cncil: 4.68
US/Canada Free Trade: 4.54
Side Letters: 4.45
Rural Tourism: 4.43
 Minority Tourism: 4.29

Average Value Score (1 - 6)
facilitation fees paid by airlines and cruise lines and 20% said bed taxes on international visitors.

**State Tourism Offices and Regional Tourism Promotional Offices**

A total of 60 surveys were mailed to this group of the travel industry with 36 being returned for a response rate of 60%.

**Importance of and Involvement with International Tourism**

All state and regional offices indicated that international tourism to the U.S. is important to their organization to some degree -- 78% said very important and 22% said somewhat important. All organizations are involved in some way or another in international tourism.

All state and regional offices are aware of USTTA. Regarding the three functions of USTTA, all of them are aware of marketing and research but the policy function does not enjoy the same 100% awareness; 88% are aware of policy and 12% are not.

**Marketing**

Awareness of the various marketing programs is extremely high by this group of organizations. With two exceptions, more than 80% of the respondents were aware of marketing’s programs or services. The two exceptions, international congress programs and gateway reception service, although not as high as the others, still have noteworthy awareness levels (71% and 57%, respectively).
(See Figures 27 and 28.)

States/regions take advantage of all of these programs to varying degrees. The following programs/services are used by half or more of the respondents: Pow Wow - USA (94%), marketing assistance from USTTA foreign offices (91%), international trade shows (88%), Marketing U.S. Tourism Abroad (80%), promotional literature (74%), journalist (74%) and travel agent (71%) familiarization programs, marketing outreach (71%), international tourism conference (69%), consumer information service centers (65%), Tourism USA: Guidelines for Tourism Development Manual (54%) and travel missions (50%).

The three programs with the least usage by this travel industry group are: international congress programs (11%), gateway receptive service (9%) and disaster relief financial assistance program (6%). The first two programs do not deal directly with states/regions so it is not unusual for usage to be low. Although the last program, disaster relief financial assistance program, does deal directly with states, it is a very new program and limited in scope, hence the low usage. (See Figures 27 and 28.)

As shown in Figures 29 and 30, the value given to these programs/services is very high, ranging from a high 5.38 (Pow Wow - USA) to 4.26 for marketing outreach and promotional literature.
State/Regional Tourism Offices
Awareness/Usage Int'l Marketing Programs

- Trade Shows
- Travel Missions
- Mktg Asst/USTTA
- Promo Literature
- Journalist Fam
- Travel Agent Fam
- Travel Agent Seminars
- Coop Trade Adv
- Coop Consumer Adv
- CIS Centers
- Trade/Tour Develop.

0% 50% 100%

 awareness 

usage
State/Regional Tourism Offices
Awareness/Usage U.S. Marketing Programs

- Pow Wow USA
- Mktg US Tourism
- Marketing Outreach
- Int'l Tourism Conf
- Answering Requests
- Tourism USA
- Disaster Relief
- Int'l Congress
- Gateway Reception

0% 50% 100%

Awareness Usage
FIGURE 29

State/Regional Tourism Offices
Value of Int'l Marketing Programs

- Travel Agnt Seminars: 5.33
- Trade Shows: 5.14
- Journalist Fam: 5.12
- Travel Agent Fam: 5.04
- Coop Trade Adv: 5
- Travel Missions: 4.94
- Trade/Tour Develop.: 4.83
- Mktg Asst/USTTA: 4.8
- CIS Centers: 4.75
- Coop Consumer Adv: 4.67
- Promo Literature: 4.29

Average Value Score (1-6)
FIGURE 30

State/Regional Tourism Offices
Value of U.S. Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow - USA</td>
<td>5.38</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>4.94</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>4.67</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.62</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>4.5</td>
</tr>
<tr>
<td>Marketing US Tourism</td>
<td>4.42</td>
</tr>
<tr>
<td>Int'l Tourism Conf.</td>
<td>4.41</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>4.26</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
States/regions rated the overall quality of USTTA’s marketing programs at 4.06, which is less than the overall average rating of 4.28.

Satisfaction of the marketing programs/services was high -- 26% were very satisfied and 51% were somewhat satisfied. Less than a fourth (23%) were not satisfied.

When asked for suggestion/comments to improve the programs/services, an equal percentage said to increase USTTA’s budget, be more responsive, make assistance more targeted/regionalized and gave specific program suggestions.

Research

As exhibited in Figure 31, nearly all states/regions are aware of Research’s publications and services (average awareness is 97%). Everyone was aware of the Summary and Analysis of International Travel to the U.S.

Usage of these publications is also very high; more than 60% of the states/regions use these publications with the Summary and Analysis being used by 91% of them. (See Figure 31.)

For those who use these publications, the value they place on them is high, ranging from 5.07 for Canadian Travel to the U.S. to 4.33 for the In-Flight Survey. (See Figure 32.)

States/regions are satisfied overall with USTTA’s Research publication/services in meeting their needs -- 36% are very satisfied and 52% are somewhat satisfied. There
FIGURE 31

State/Regional Tourism Offices
Awareness/Usage Research Publications

Summary & Analysis 85% 91%
Canadian Travel 85% 97%
Economic Impact 85% 97%
Outlook 82% 97%
Recap 75% 97%
In-Flight Survey 64% 97%
Answering Requests 90% 91%
Pleasure Travel 60% 88%

Awareness Usage
FIGURE 32

State/Regional Tourism Offices
Value of Research Publications

Canadian Travel  5.07
Economic Impact  4.93
Outlook          4.79
Pleasure Travel  4.72
Recap            4.68
Summary & Analysis  4.62
Answering Requests  4.58
In-Flight Survey  4.33

Average Value Score (1-5)
were 12% who were not satisfied though.

When asked for comments/suggestions on the Research program, 45% complained about USTTA’s research methodology or gave specific suggestions for the types of data that should be collected. A fifth of them commented that USTTA’s data is out of date or too old by the time it is distributed. There were 15% who commented that the data is not as accessible or as easy to obtain as it should be.

Policy

Figure 33 demonstrates that awareness of Policy activities by states/regions is fairly high, with some activities being more visible than others. There was high awareness for the rural tourism initiative (85%), followed by two-thirds awareness for the U.S.-Canada free trade area agreement. The activities with the lowest awareness are air transport negotiations and minority tourism development (29% and 30%, respectively).

For the states/regions that are aware of these activities, the value they placed on them ranged from 5.29 for facilitation policies to 3.29 for world’s fairs and international expositions. (See Figure 34.)

States/regions expressed overall satisfaction with USTTA’s Policy activities in meeting their needs -- 18% were very satisfied and 78% were somewhat satisfied. There were only 4% who were not satisfied.
FIGURE 33

State/Regional Tourism Offices
Awareness of Policy Activities

- Rural Tourism: 85%
- US/Canada Free Trade: 67%
- Bilateral Agreements: 61%
- GATT: 55%
- Tourism Policy Council: 56%
- Facilitation Policy: 53%
- World's Fairs/Exp.: 47%
- Side Letters: 47%
- EC'92: 42%
- Minority Tourism: 30%
- Air Transport: 29%
State/Regional Tourism Offices
Value of Policy Activities

Facilitation Policy: 5.29
US/Canada Free Trade: 5
Minority Tourism: 4.89
Air Transport Neg.: 4.88
Bilateral Agreements: 4.83
Tourism Policy Cncl: 4.77
Side Letters: 4.5
GATT: 4.38
Rural Tourism: 4.12
EC '92: 4
World's Fairs/Exp.: 3.29

Average Value Score (1 - 6)
USTTA Funding

All states/regions felt that the U.S. Government should fund programs related to international tourism to the U.S.

When asked specifically how USTTA should be funded, an overwhelming 91% said through appropriations from U.S. general tax revenues. Two-fifths (41%) mentioned facilitation fees and 38% mentioned departure fees. Only 7% offered bed taxes as an alternative method of funding.

City Convention and Visitor Bureaus (CVB’s)

A total of 342 surveys were mailed to city CVB’s and 170 surveys were returned completed. This amounted to a 50% response rate.

Importance of and Involvement with International Tourism

Nearly all CVB’s stated that international tourism is important to their organization -- 53% said it is very important and 41% said it was somewhat important. Only 6% said it was not important.

Two-thirds of CVB’s are currently involved in the international tourism market. Of the third who are not involved, 69% of them said they are interested in getting involved but are held back mostly by budget restrictions (58%). Other constraints include staff restrictions (15%) and lack of knowledge/experience (12%); 10% indicated that the international market is not relevant.

To assist them in getting involved in the international market, "how to" information was requested by 40% of those
currently not in the market but who would like to be in the market. They also asked for funding (25%) and education (13%).

Awareness of USTTA overall was very high among CVB’s -- 98% said they were aware. Among the various functions, CVB’s were most aware of Research and Marketing (89% and 88%, respectively). Nearly two-thirds (66%) were aware of the Policy function.

**Marketing**

With two exceptions, awareness of the 20 marketing programs/services was very high among CVB’s. This is presented in Figures 35 and 36. Both domestic and international trade shows received a 97% awareness.

More than three-fourths of the CVB’s are aware of: USTTA’s International Tourism Conference (89%), travel missions (89%), travel agent (86%) and journalist (82%) familiarization programs, marketing assistance from USTTA foreign offices (86%), cooperative trade (81%) and consumer (77%) advertising, consumer information service centers (82%), promotional literature (82%), marketing outreach (77%) and the publication *Marketing U.S. Tourism Abroad* (77%).

With two exceptions, more than half of the CVB’s are aware of the remaining marketing programs/services. The two exceptions are gateway reception services and the disaster relief financial assistance program, with awareness levels
City Convention/Visitors Bureaus
Awareness/Usage Int'l Marketing Programs

- Trade Shows
- Travel Missions
- Mktg Asst/USTTA
- Travel Agent Fam
- CIS Centers
- Journalist Fam
- Promo Literature
- Coop Trade Adv
- Coop Consumer Adv
- Travel Agent Seminars
- Trade/Tour Develop.
City Convention/Visitors Bureaus Awareness/Usage U.S. Marketing Programs

FIGURE 36
of 32% and 28%, respectively.

Of those who are aware of the Marketing programs/services, more than half of them "use": Pow Wow - USA (78%), international trade shows (67%), marketing assistance from USTTA foreign offices (60%) and the consumer information services centers (51%).

The lowest usage is for gateway reception service (5%) and disaster relief financial assistance program (2%). This is not surprising since these programs have a limited audience. The remaining programs/services had usage ranging between 42% (travel agent familiarization program) to 10% (cooperative consumer advertising). Figures 35 and 36 illustrate the usage compared with awareness.

For those CVB’s which use the marketing programs/services, the value they placed on the programs was very high, as indicated on Figures 37 and 38. For CVB’s, the top ten programs/services all received value scores between 5 and 6. For some programs, however, the response rate was very low so the value ratings reflected either a very high score or a very low score. An example of this is the disaster relief financial assistance program where only two responses were given and the value score was a perfect 6.0.

CVB’s rated the overall quality of the Marketing programs/services at a score of 4.48, the highest score of all industry groups. The average was 4.28.
FIGURE 37

City Convention/Visitors Bureaus
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journalist Fam</td>
<td>5.35</td>
</tr>
<tr>
<td>Trade Shows</td>
<td>5.32</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>5.28</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>5.22</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>5.13</td>
</tr>
<tr>
<td>Travel Agnt Seminars</td>
<td>5.09</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>5.04</td>
</tr>
<tr>
<td>Coop Consumer Adv</td>
<td>4.9</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>4.78</td>
</tr>
<tr>
<td>Coop Trade Adv</td>
<td>4.58</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.42</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
City Convention/Visitors Bureaus
Value of U.S. Marketing Programs

Disaster Relief: 6
Pow Wow - USA: 5.47
Answering Requests: 5.18
Gateway Reception: 5
Marketing US Tourism: 4.87
Tourism USA: 4.81
Int'l Tourism Conf: 4.39
Marketing Outreach: 4.3
Int'l Congress: 2.67
Overall, CVB’s were satisfied with the marketing programs/services -- 38% were very satisfied and 56% were somewhat. Only 6% were not satisfied.

When asked for comments/suggestions to improve the marketing programs/services, 28% gave specific program suggestions, 25% suggested that the assistance be more targeted or regionalized, 21% commented that USTTA’s budget should be increased and 10% said USTTA should be more responsive to their needs.

Research

Awareness of the Research programs/services by the CVB’s was very high, ranging from 89% for the Summary and Analysis to 69% for the service of answering information requests from the public and trade. Other awareness levels are displayed on Figure 39.

On the same Figure, it is shown that the majority of publications provided by Research are well used by the CVB’s. More than half of them are aware of and have used the: Summary and Analysis, Canadian Travel to the U.S., Recap, Impact of Foreign Visitor Spending on State Economies and the Outlook. Approximately a third of them use the In-Flight Survey and the Pleasure Travel Market Survey series.

For those who have used these publications, the value they place on them is in the high range, from 5.03 for the Outlook to 4.55 for the Recap. (See Figure 40.)
FIGURE 39

City Convention/Visitors Bureaus Awareness/Usage Research Publications

<table>
<thead>
<tr>
<th>Category</th>
<th>Awareness</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gommary &amp; Analysis</td>
<td>80%</td>
<td>60%</td>
</tr>
<tr>
<td>Outlook</td>
<td>87%</td>
<td>50%</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>86%</td>
<td>55%</td>
</tr>
<tr>
<td>Recap</td>
<td>88%</td>
<td>53%</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>86%</td>
<td>51%</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>74%</td>
<td>33%</td>
</tr>
<tr>
<td>Pleasure Travel</td>
<td>73%</td>
<td>34%</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>60%</td>
<td>27%</td>
</tr>
</tbody>
</table>
FIGURE 40

City Convention/Visitors Bureaus Value of Research Publications

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlook</td>
<td>5.03</td>
</tr>
<tr>
<td>Pleasure Travel</td>
<td>4.97</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>4.94</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.93</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>4.8</td>
</tr>
<tr>
<td>Summary &amp; Analysis</td>
<td>4.76</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>4.74</td>
</tr>
<tr>
<td>Recap</td>
<td>4.55</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
When asked how satisfied they are overall with USTTA’s Research publications/services, nearly all said they were satisfied -- 39% were very satisfied and 55% were somewhat satisfied. Only 6% were not satisfied.

When given the opportunity to provide suggestions or comments on how to improve the usefulness of the information provided in the Research programs at USTTA, the comment offered the most by CVB’s dealt with improving or changing the methodology. Improving the timeliness was also suggested by a substantial number of CVB’s.

Policy

Awareness by CVB’s of Policy activities was quite diverse, ranging from 57% awareness for the U.S.-Canada Free Trade Area Agreement to 15% for the Air Transport (CIVAIR) Negotiations. Half were aware of the Rural Tourism Initiative. Approximately two-fifths are aware of Bilateral Tourism Agreements (46%), Tourism Policy Council (45%), World’s Fairs and International Expositions (40%) and Bilateral Trade Agreements and Tourism Side Letters (39%) and facilitation policies (37%). A third are aware of GATT (34%) and approximately a fourth are aware of EC’92 Interagency Task Force (24%) and Minority Tourism Development (23%). (See Figure 41.)

For those who are aware of the various Policy activities, high value scores were given to facilitation policies and air transport negotiations; the latter activity
Figure 41

City Convention/Visitors Bureaus Awareness of Policy Activities

- US/Canada Free Trade: 57%
- Rural Tourism: 51%
- Bilateral Agreements: 46%
- Tourism Policy Council: 45%
- World's Fairs/Exp.: 40%
- Side Letters: 39%
- Facilitation Policy: 37%
- GATT: 34%
- EC '92: 24%
- Minority Tourism: 23%
- Air Transport Neg.: 15%
received the lowest awareness level but, for those who are aware of it, they place a high value on it. High value scores were also given to: bilateral tourism agreements (4.93), tourism policy council (4.76), bilateral trade agreements/side letters (4.74) and U.S.-Canada Free Trade Agreement (4.62). (See Figure 42.)

When asked how satisfied they are overall with Policy’s activities in meeting their needs, 89% indicated satisfaction (30% very satisfied, 59% somewhat satisfied); 12% were not satisfied.

**USTTA Funding**

All but 1% of CVB’s thought the U.S. Government should spend money on programs related to international tourism to the U.S.

The majority of CVB’s thought the method of funding should come from appropriations from U.S. general tax revenues (79%), followed by facilitation fee (41%) and departure fee (34%). Only 3% offered a bed tax as a solution.

**Research and Consulting Firms**

There were 71 research and consulting firms who responded to this survey. This represents a 42% response rate from the 168 surveys mailed to research and consulting firms.
FIGURE 42

City Convention/Visitors Bureaus
Value of Policy Activities

Facilitation Policy: 5.15
Air Transport Neg.: 5.00
Bilateral Agreements: 4.93
Tourism Policy Cncill: 4.76
Side Letters: 4.74
US/Canada Free Trade: 4.62
GATT: 4.40
EC '92: 4.32
Minority Tourism: 4.05
World's Fairs/Exp.: 3.91
Rural Tourism: 3.61

Average Value Score (1 - 6)

139
Importance of and Involvement with International Tourism

International travel and tourism to the U.S. is important to the research and consulting firms responding to the survey but not to the same high degree as with other tourism industry groups surveyed. Approximately a third (34%) indicated it was very important and 46% said it was somewhat important. However, 20% said it was not important.

Four-fifths (80%) of the research/consulting firms are currently involved in international tourism; 20% are not. Of those who are not currently involved, only 39% are interested in getting involved in the international travel and tourism market but lack of knowledge and budget restrictions hold them back.

Nearly all (95%) of the research/consulting firms work with state tourism offices, international tourism promotion organizations or CVB’s when dealing with the international market.

Nearly all (96%) respondents indicated awareness of USTTA. Since these organizations deal heavily in research, it is not surprising that more of them are aware of the Research function (93%) over Marketing (85%) and Policy (76%).

Marketing

Overall, awareness of the various marketing programs is high but usage is very low. This is illustrated in Figures 43 and 44.
Research/Consulting Firms
Awareness/Usage Int'l Marketing Programs

- Trade Shows
- Promo Literature
- Travel Missions
- Mktg Asst/USTTA
- Coop Trade Adv
- Coop Consumer Adv
- Trade/Tour Develop.
- Travel Agnt Seminars
- Travel Agent Fam
- CIS Centers
- Journalist Fam

Awareness
Usage

FIGURE 43

141
Research/Consulting Firms
Awareness/Usage U.S. Marketing Programs

Int'l Tourism Conf 67% 67%
Pow Wow USA 77% 77%
Marketing Outreach 74% 74%
Answering Requests 74% 74%
Mktg US Tourism 74% 74%
Tourism USA 37% 37%
Int'l Congress 4% 4%
Disaster Relief 42% 42%
Gateway Reception 32% 32%

0% 50% 100%

Awareness Usage

FIGURE 44

142
Awareness of the marketing programs/services generally fell within the range of 83% for the both domestic (Pow Wow - USA) and international trade shows to 51% for Tourism USA. The only two programs with low awareness are disaster relief financial assistance program (40%) and gateway reception service (32%).

Usage was very low, ranging from 0% for international congress programs to 32% for the International Tourism Conference and Tourism USA. With usage being so low, there were only a few respondents who placed value ratings on these programs/services. These value scores were all in the high range, as shown on Figures 45 and 46.

Research/consulting firms rated the overall quality of USTTA’s marketing programs and services a 4.08. This score is just above the mid-point of 3.5 and is probably reflective of the fact that this group is not familiar with the programs/services.

Satisfaction with the marketing programs/services is high with 40% being very satisfied and 40% being somewhat satisfied; 20% were not satisfied.

Suggestions to improve USTTA’s marketing programs to increase their usefulness to the research/consulting firms included increasing the budget, being more responsive and making assistance more targeted.
FIGURE 45

Research/Consulting Firms
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journalist Fam</td>
<td>6</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>5.67</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>5.67</td>
</tr>
<tr>
<td>Trade Shows</td>
<td>5.57</td>
</tr>
<tr>
<td>Coop Consumer Adv</td>
<td>5.5</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>5.38</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>5.33</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.91</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>4.75</td>
</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>4</td>
</tr>
<tr>
<td>Coop Trade Adv</td>
<td>3.5</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
Research/Consulting Firms
Value of U.S. Marketing Programs

- Disaster Relief: 6
- Gateway Reception: 5
- Tourism USA: 5
- Marketing US Tourism: 5
- Int'l Tourism Conf: 4.67
- Pow Wow - USA: 4.5
- Marketing Outreach: 4.33
- Answering Requests: 4.13

Average Value Score (1-6)
Research

Figure 47 indicates that the research/consulting firms had high awareness levels for the Research publications/services. The lowest awareness level went to Research’s service of answering information requests from the public/trade and that received an overwhelming 80%. The Summary and Analysis and Outlook had the highest awareness levels at 94%.

Usage of these publications/services was also high, especially for the two publications mentioned above -- three-quarters of them use the Summary and Analysis and the Outlook. With one exception, half or more of them use the other publications. As with awareness, the lowest usage was for the service of answering information requests. (See Figure 47.)

Figure 48 illustrates that the value placed on these publications was approximately 4.7 on the six point scale. The service of answering requests received the lowest value at 4.15.

Overall the research/consulting firms are satisfied with Research’s publications/services in meeting their needs -- 49% were very satisfied and 40% were somewhat satisfied. There were 11% who were not satisfied.

The suggestions and comments they provided to improve the Research programs dealt primarily with improving or changing the methodology.
Research/Consulting Firms
Awareness/Usage Research Publications

<table>
<thead>
<tr>
<th>Category</th>
<th>Awareness</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlook</td>
<td>75%</td>
<td>94%</td>
</tr>
<tr>
<td>Summary &amp; Analysis</td>
<td>73%</td>
<td>94%</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>55%</td>
<td>90%</td>
</tr>
<tr>
<td>Pleasure Travel</td>
<td>55%</td>
<td>80%</td>
</tr>
<tr>
<td>Recap</td>
<td>53%</td>
<td>90%</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>45%</td>
<td>86%</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>63%</td>
<td>84%</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>26%</td>
<td>80%</td>
</tr>
</tbody>
</table>
Policy

Of the eleven Policy activities listed in the survey, Figure 49 reveals that awareness by the research/consulting firms was fairly high for about half of them. These included: U.S.-Canada Free Trade Agreement (66% awareness), bilateral tourism agreements (63% awareness), GATT (56% awareness), tourism policy council (55%), rural tourism initiative (52%), world’s fairs and expositions (47%), and bilateral trade agreements and tourism side letters (46%). Awareness of the other activities ranged from 38% for facilitation policies to 21% for minority tourism development.

For those who are aware of the Policy activities, the value they placed on these activities was high, especially for facilitation policies (4.93), bilateral tourism agreements (4.86), U.S.-Canada free trade agreement (4.80) and air transport negotiations (4.75). (See Figure 50.)

The research/consulting firms overall were satisfied with Policy’s activities in meeting their needs -- 36% were very satisfied and 56% were somewhat satisfied. Only 8% were not satisfied.

USTTA Funding

When asked separately if the U.S. Government should be involved with and spend money on the three function areas of USTTA (promoting international tourism to the U.S., data collection, and on international tourism policy issues,
Research/Consulting Firms
Awareness of Policy Activities

- US/Canada Free Trade: 66%
- Bilateral Agreements: 63%
- GATT: 56%
- Tourism Policy Council: 55%
- Rural Tourism: 52%
- World's Fairs/Expos.: 47%
- Side Letters: 46%
- Facilitation Policy: 38%
- Air Transport Negot.: 32%
- EC '92: 27%
- Minority Tourism: 21%
FIGURE 50

Research/Consulting Firms
Value of Policy Activities

Facilitation Policy  4.93
Bilateral Agreements  4.86
US/Canada Free Trade  4.8
Air Transport Neg.  4.75
Tourism Policy Cncil  4.67
Side Letters  4.59
Minority Tourism  4.56
GATT  4.55
Rural Tourism  4.39
EC'92  4.23
World's Fairs/Exp.  4.06

Average Value Score (1 - 6)
there was unanimous agreement by the research/consulting firms. However, when asked again at the end of the survey, not everyone was unanimous -- 93% believed that the U.S. Government should spend money on programs related to international tourism to the U.S.

The majority of them (85%) felt the money should come from appropriations from U.S. general tax revenues. Nearly half (48%) also mentioned facilitation fees, 38% mentioned departure fees, and 23% said bed taxes should provide the funds for USTTA.

Airlines

There were 113 airlines surveyed; these airlines included both domestic and international airlines which carry passengers from other countries to the U.S. With 29 airlines returning completed questionnaires, a 26% response rate was achieved. This response rate was the lowest of all travel and tourism industry groups surveyed.

Although USTTA deals heavily with airlines in its Research function, specifically for the In-Flight Survey, this questionnaire was addressed to the President of the airline. If the survey did not filter down to the individual(s) familiar with USTTA, this could be one reason for the low response rate from an industry group USTTA deals with frequently.

Due to the low response rate, the following description of responses from the airlines will be limited to general
Importance of and Involvement with International Tourism

International tourism to the U.S. is important to the airlines responding and the majority of them are involved in it.

Awareness of USTTA is very high but not nearly as high for the three function areas.

Marketing

Overall awareness of the marketing programs/services was high for the services offered in the international marketplace but low for those provided in the U.S.

Usage is very low across the board; the only service with a fairly high usage is Pow Wow - USA.

In general, airlines are satisfied with Marketing’s programs/services but only somewhat.

Research

The airlines responding to the survey are well aware of many Research publications, especially the Summary and Analysis and In-Flight Survey. They are not as familiar with the Canadian Travel to the U.S., the Impact of Foreign Spending on State Economies and the service of answering information requests from the trade/public.

Usage of these publications falls into the same general role as awareness, i.e., where awareness was high, usage was high.

The airlines responding to the survey were more
satisfied with the Research’s publications than dissatisfied.

**Policy**

Awareness of Policy’s activities was very low for the airlines responding to the survey. More airlines were satisfied than dissatisfied with Policy’s activities in meeting their needs.

**USTTA Funding**

The airlines agreed that the U.S. Government should make expenditures on programs related to international tourism to the U.S. All of them felt the funding for USTTA should come from appropriations from U.S. general tax revenues; a departure fee was also mentioned as a source.

**Airport Authorities**

A total of 157 international airport authorities in the U.S. were surveyed, with 89 responding. The response rate from this industry group was the second highest among all those surveyed at 57%.

**Importance of and Involvement with International Tourism**

The majority of airport authorities consider international travel and tourism to the U.S. important -- 63% consider it very important and 32% somewhat important.

Although all airports surveyed were international, not all of them said they were involved in the international travel and tourism market. This could have been a misunderstanding in the wording of the question since
specific examples were given. The person answering the survey may not have related the examples to their airport. Only about two-thirds (69%) said they are currently involved in the international travel and tourism market.

The majority (83%) of airport authorities work with state tourism offices, international tourism promotion organizations or CVB’s when dealing with the international market.

Approximately two-thirds (65%) of airport authorities are aware of USTTA; awareness of the Marketing and Research functions was even higher at 74% each. There are also quite a few airport authorities aware of the Policy function -- 61%.

Marketing

Of the twenty Marketing programs/services, airport authorities are more aware of the services in the international marketplace than those provided in the U.S., although awareness is high across the board. Trade shows, domestic (86%) and international (94%), and travel missions (94%) had the highest awareness. These are illustrated in Figures 51 and 52.

Usage of these marketing programs/services is highest for trade shows (51% international and 40% domestic) but low for most of the other services, as shown in the same Figures 51 and 52.

155
Airport Authorities Awareness/Usage Int'l Marketing Programs

- Travel Missions
- Trade Shows
- Promo Literature
- Travel Agent Fam
- Trade/Tour Develop.
- Travel Agent Seminars
- Journalist Fam
- Mktg Asst/USTTA
- CIS Centers
- Coop Trade Adv
- Coop Consumer Adv

0% 50% 100%

Awareness Usage
Airport Authorities
Awareness/Usage U.S. Marketing Programs

- Pow Wow - USA: 40% Awareness, 10% Usage
- Answering Requests: 25% Awareness, 2% Usage
- Int'l Tourism Conf: 10% Awareness, 2% Usage
- Marketing Outreach: 75% Awareness, 5% Usage
- Tourism USA: 75% Awareness, 5% Usage
- Mtg US Tourism: 75% Awareness, 5% Usage
- Int'l Congress: 25% Awareness
- Gateway Reception: 75% Awareness, 5% Usage
- Disaster Relief: 5% Awareness, 2% Usage

AWARENESS

_USAGE_
The value scores, as demonstrated in Figures 53 and 54, are relatively high, especially for Pow Wow-USA (5.67) and gateway reception service (5.5). International trade shows (5.06), travel agent and journalist familiarization programs (5.00 each), and travel agent seminars (5.00) also received high value scores from airport authorities.

Airport authorities rated the overall quality of Marketing’s programs and services a 4.50, well above the overall average of 4.28.

Satisfaction with the marketing programs/services was very high -- 37% were very satisfied and 57% were somewhat satisfied.

**Research**

Awareness of Research’s publications and services was high by airport authorities, ranging from 87% for the service of answering information requests from the trade and public to 62% for the Pleasure Travel Market Survey. The Summary and Analysis (84%) and In-Flight Survey (81%) also received high awareness levels; these are the publications which most relate to airport authorities. (See Figure 55.)

Usage of these publications is high for the In-Flight Survey (56%), Summary and Analysis (55%), the Recap (50%) and Impact of Foreign Visitor Spending on State Economies (48%). (See Figure 55.)
FIGURE 53

Airport Authorities
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Shows</td>
<td>5.06</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>5</td>
</tr>
<tr>
<td>Journalist Fam</td>
<td>5</td>
</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>5</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>4.62</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.56</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>4.56</td>
</tr>
<tr>
<td>Coop Trade Adv</td>
<td>4.5</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>4</td>
</tr>
<tr>
<td>Coop Consumer Adv</td>
<td>3.5</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>3.43</td>
</tr>
</tbody>
</table>
Airport Authorities Value of U.S. Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow - USA</td>
<td>5.67</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>5.5</td>
</tr>
<tr>
<td>Marketing US Tourism</td>
<td>4.63</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.44</td>
</tr>
<tr>
<td>Int'l Tourism Conf.</td>
<td>4.38</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>4.33</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>3.75</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
Figure 56 shows that the value placed on these publications is high across the board, but especially for the Summary and Analysis (5.00).

Overall satisfaction with Research’s publications/services was very high, with 37% saying they were very satisfied and 56% somewhat satisfied.

Suggestions for improvement came mainly in the form of improving the methodology.

Policy

Awareness of the Policy activities was moderate for seven of the eleven activities among the airport authorities, with the highest awareness for facilitation policies (65%). (See Figure 57.)

The value of most of these activities was high, especially for facilitation policies (5.12), as might be expected since it had the highest awareness and directly impacts airport authorities. GATT received the lowest value rating (3.64) but had one of the highest awareness levels. (See Figure 58.)

USTTA Funding

All airport authorities agreed that the U.S. Government should spend money on programs related to international tourism to the U.S.

Half of them (52%) said USTTA should be funded from appropriations from U.S. general tax revenues, 40% said departure fees, 38% indicated facilitation fees and 30% bed
FIGURE 56

Airport Authorities Value of Research Publications

<table>
<thead>
<tr>
<th>Title</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary &amp; Analysis</td>
<td>5</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>4.7</td>
</tr>
<tr>
<td>Pleasure Travel</td>
<td>4.67</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>4.5</td>
</tr>
<tr>
<td>Outlook</td>
<td>4.5</td>
</tr>
<tr>
<td>Recap</td>
<td>4.43</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>4.4</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.25</td>
</tr>
</tbody>
</table>

Average Value Score (1-5)
FIGURE 57

Airport Authorities
Awareness of Policy Activities

- Facilitation Policy: 65%
- GATT: 58%
- World's Fairs/Exp.: 55%
- US/Canada Free Trade: 55%
- Bilateral Agreements: 42%
- Side Letters: 42%
- Air Transport Neg.: 40%
- EC'92: 29%
- Rural Tourism: 19%
- Tourism Policy Council: 19%
- Minority Tourism: 13%
Airport Authorities
Value of Policy Activities

Facilitation Policy: 5.12
Bilateral Agreements: 5.09
Rural Tourism: 4.83
Tourism Policy Council: 4.75
Side Letters: 4.73
Air Transport Negot.: 4.38
Minority Tourism: 4.33
World’s Fairs/Exp.: 4.25
US/Canada Free Trade: 4.15
EC '92: 4.13
GATT: 3.64

Average Value Score (1 - 6)
taxes.

Cruise Lines

Of the 32 cruise lines surveyed, only 9 returned completed questionnaires. This represents a 28% response rate. Due to the small universe of cruise lines and the low response rate, this discussions will be limited to general comments about the cruise line responses. These comments only represent a small percentage of the cruise lines.

Importance of and Involvement with International Tourism

In general, international tourism is important to cruise lines and the majority of those who responded are involved in it.

All cruise lines who responded are aware of USTTA in general and the Marketing and Research functions of USTTA; nearly all are aware of the Policy function.

Marketing

The cruise lines responding to the survey are aware of all of the twenty marketing programs/services but usage is very low, with the exception of domestic and international trade shows. Cruise lines are satisfied with Marketing’s programs and services.

Research

Awareness of the various Research publications and services is high for cruise lines; usage is high for some publications but not for others. The cruise lines are generally satisfied with Research’s publications/services.
Policy

Cruise lines’ awareness of Policy activities is low, although the U.S.-Canada Free Trade Agreement and World’s Fairs and Expositions had somewhat high awareness.

Although awareness of Policy’s activities is low, cruise lines expressed greater satisfaction with the activities than dissatisfaction.

USTTA Funding

The cruise lines agree that the U.S. Government should spend money on programs related to international tourism to the U.S. They thought funding for USTTA should come from departure fees and appropriations.

Car Rental Companies

There were 198 car rental companies surveyed; these represent only travel-related rental companies as identified by the American Car Rental Association (the majority of car rental companies are comprised of fleet/executive leasing companies and car dealers and service stations who lease/rent to people whose cars are in for service). Of the 198 mailed, 82 were returned for a response rate of 41%.

Importance of and Involvement with International Tourism

The majority of car rental companies consider international travel and tourism to the U.S. important to their organization -- 49% consider it very important and 39% consider it somewhat important.

More than half (56%) of them are currently involved in
the international travel and tourism market. Of those not involved, (44%) indicated they would be interested in getting involved in the international travel and tourism market but lack of knowledge is the main reason cited for not entering this arena. "How to" information would help.

Three-fourths of the car rental companies work with state tourism offices, international tourism promotion organizations or CVB’s when dealing with the international market.

Car rental companies are the least aware of USTTA and its three function areas. Only 22% indicated awareness of USTTA in general; of the three function areas, Marketing received the highest awareness but Research and Policy were virtually unknown.

Due to the fact that so few car rental companies are aware of USTTA and its various function areas, the responses for the remainder of the survey can only be generalized.

Marketing

There is an overall awareness of the various Marketing programs/services but usage is virtually non-existent. Of those car rental companies who responded to the survey and are aware of USTTA, there is overall satisfaction with Marketing’s programs/services.

Research

As with Marketing, there is an overall awareness of the various Research publications/services but usage is very
low. Of those car rental companies who responded to the
survey and are aware of USTTA, there is overall satisfaction
with Research’s publications/services.

Policy
There is virtually no awareness of Policy activities by
the car rental companies who responded to this survey.

USTTA Funding
The car rental companies who responded indicated that
the U.S. Government should spend money on programs related
to international tourism to the U.S. They felt USTTA should
be funded via facilitation fees, followed by appropriations,
departure fees and then bed taxes.

Public Land Transportation (Bus/Train)
This category is comprised of Amtrak and 441 Interstate
Commerce Commission common carrier motor coach companies,
including the 300 top operators. Of the 442 organizations
surveyed, 176 returned completed questionnaires accounting
for a 40% response rate.

Importance of and Involvement with International Tourism
The public land transportation companies surveyed
considered international travel and tourism to the U.S. as
important -- 42% felt it was very important and 38% said it
was somewhat important. There were 20% who said it was not
important.

Even though a majority felt international tourism is
important to their organization, only 39% are currently
involved in it. Of the 61% who are not involved, approximately two-thirds of them are interested in getting involved in it but cite a lack of knowledge as their prime reason for not entering this market. "How to" information would help them get involved.

More than three-fourths of them work with state tourism offices, international tourism promotion organizations or CVB’s when dealing with the international market.

Only half of the public land transportation companies are aware of USTTA. Of the three USTTA function areas, 66% are aware of Marketing, 60% are aware of Research and 51% are aware of Policy.

**Marketing**

With a few exceptions, public land transportation awareness of the numerous Marketing programs is rather high; half or more of the respondents are aware of the programs/services. The highest awareness is for the international and domestic trade shows (90% and 88%, respectively). The two exceptions are disaster relief financial assistance program (34% awareness) and international congress programs (37%). This is shown in Figures 59 and 60.

Although awareness is high, usage is essentially non-existent, which is not necessarily surprising given the nature of many of the Marketing services. The only programs/services with more than 50% usage are the domestic
Public Land Transportation
Awareness/Usage Int’l Marketing Programs

![Diagram showing public land transportation awareness/usage for various marketing programs.](image)
FIGURE 60

Public Land Transportation Awareness/Usage U.S. Marketing Programs

- Jow Wow - USA: 40% Awareness, 78% Usage
- Answering Requests: 3% Awareness, 5% Usage
- Marketing Outreach: 1% Awareness, 3% Usage
- Int'l Tourism Conf: 0% Awareness, 2% Usage
- Mkgr US Tourism: 0% Awareness, 0% Usage
- Gateway Reception: 5% Awareness, 1% Usage
- Tourism USA: 4% Awareness, 2% Usage
- Int'l Congress: 0% Awareness, 0% Usage
- Disaster Relief: 0% Awareness, 0% Usage

Awareness: [ ]
Usage: [ ]
(63%) and international (52%) trade shows. (See Figures 59 and 60.) The value placed on these two services was extremely high (5.5 for international and 5.35 for domestic trade shows), as demonstrated in Figures 61 and 62.

Public land transportation companies rated the overall quality of the marketing programs and services a 4.36.

Overall, public land transportation companies are satisfied with Marketing’s programs/services in meeting their needs -- 28% are very satisfied and 56% are somewhat satisfied. There were 16% who said they were not satisfied.

Research

Half or more of the motor coach/train companies were aware of the various Research publications, with the exception of the Pleasure Travel Market Survey where 36% were aware. Usage of the Research publications was minimal; the most frequently used resource is the Summary and Analysis (31% usage). This is illustrated in Figure 63.

Figure 64 demonstrates that the value ratings were high for all of the publications/services, with the service of answering requests to be a 6, out of a maximum of 6.

There is general satisfaction with Research’s publications -- 32% were very satisfied and 52% are only somewhat satisfied. There were, however, 16% who were not satisfied.
Public Land Transportation
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Shows</td>
<td>5.5</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>5.33</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>5.11</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>5</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>5</td>
</tr>
<tr>
<td>Journalist Fam</td>
<td>4.88</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>4.75</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.38</td>
</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>4</td>
</tr>
</tbody>
</table>

FIGURE 61

174
Public Land Transportation Value of U.S. Marketing Programs

- Pow Wow - USA: 5.35
- Marketing US Tourism: 5.25
- Answering Requests: 5
- Int'l Tourism Conf: 4.57
- Marketing Outreach: 4
- Tourism USA: 3

Average Value Score (1-6)
Public Land Transport Awareness/Usage Research Pl

- Outlook: 24%
- Economic Impact: 21%
- Canadian Travel: 6%
- Summary & Analysis: 64%
- Recap: 59%
- In-Flight Survey: 51%
- Answering Requests: 50%
- Pleasure Travel: 39%

Awareness
FIGURE 64

Public Land Transportation
Value of Research Publications

Answering Requests
In-Flight Survey: 5
Pleasure Travel: 5
Canadian Travel: 5
Outlook: 4.67
Economic Impact: 4.5
Summary & Analysis: 4.42
Recap: 4.36

Average Value Score (1-6)
Policy

Less than half of the public land transportation companies are aware of Policy’s activities. Those activities with the highest awareness are: world’s fairs/expositions (49%), U.S.-Canada free trade agreement (49%), tourism policy council (35%), bilateral tourism agreements (35%) and bilateral trade agreements/side letters (27%); all others had less than 20% awareness. (See Figure 65.) Value ratings can be found on Figure 66; they reveal high value scores for all but two activities, rural tourism and minority tourism. There is general satisfaction with Policy’s activities.

USTTA Funding

Nearly all (98%) train/motor coach companies thought the U.S. Government should make expenditures on programs related to international tourism to the U.S. More than half (55%) thought that USTTA should be funded through appropriations, 40% from facilitation fees, 27% from departure fees and 18% from bed taxes.

Receptive Tour Operators

From the National Tour Association membership list, 160 receptive tour operators surveyed with 60 of them returning completed surveys. This amounts to a 38% response rate.

Importance of and Involvement with International Tourism

Receptive tour operators consider international travel and tourism to the U.S. important to their organizations --
Public Land Transportation Awareness of Policy Activities

FIGURE 65

World’s Fairs/Exp. 49%
US/Canada Free Trade 49%
Tourism Policy Council 35%
Bilateral Agreements 35%
Side Letters 27%
GATT 19%
Rural Tourism 16%
Facilitation Policy 16%
Air Transport Negot. 14%
EC '92 8%
Minority Tourism 8%
Public Land Transportation
Value of Policy Activities

<table>
<thead>
<tr>
<th>Policy Activity</th>
<th>Average Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Transport Neg.</td>
<td>5.67</td>
</tr>
<tr>
<td>Bilateral Agreements</td>
<td>5</td>
</tr>
<tr>
<td>EC '92</td>
<td>5</td>
</tr>
<tr>
<td>US/Canada Free Trade</td>
<td>5</td>
</tr>
<tr>
<td>Side Letters</td>
<td>4.91</td>
</tr>
<tr>
<td>GATT</td>
<td>4.83</td>
</tr>
<tr>
<td>World's Fairs/Exp.</td>
<td>4.75</td>
</tr>
<tr>
<td>Tourism Policy Council</td>
<td>4.55</td>
</tr>
<tr>
<td>Rural Tourism</td>
<td>3.6</td>
</tr>
<tr>
<td>Minority Tourism</td>
<td>2.5</td>
</tr>
</tbody>
</table>

Average Value Score (1 - 6)
33% said it is very important and 52% indicated somewhat important; 15% felt it is not important.

Nearly three-fifths (59%) of the respondents are currently involved in the international travel market. Of the 41% who are not currently involved, nearly 90% would be interested in getting involved but cite a lack of knowledge and budget restrictions to be the main obstacles.

The majority (88%) of them work with offices, international tourism promotion CVB’s, and international trade shows. The majority (88%) of them work with offices, international tourism promotion CVB’s, and international trade shows.

Three-fourths of them (76%) are aware of Marketing and of Research, while three-fourths are aware of Marketing and of Research. Three-fourths of them (76%) are aware of Marketing and of Research.

Marketing

With a few exceptions, half or more operators are aware of the many Marketing and Research programs. The highest awareness is for trade show Wow - USA) and international. The lowest awareness is for international congress programs, goods, services, and disaster relief financials. Usage is either extremely low or nonexistent in the exception of trade shows. Tour operators are satisfied with Marketing’s programs/services.

Research

Overall, tour operators are familiar...
Research publications available but usage is rather low. In general, tour operators are satisfied with Research’s publications.

**Policy**

Tour operators are only minimally aware of Policy’s activities. World’s fair and expositions have the highest awareness. There is general satisfaction with Policy’s activities by tour operators.

**USTTA Funding**

The majority of tour operators believe the U.S. Government should make expenditures of programs related to international tourism to the U.S. Tour operators felt that USTTA should be funded primarily through appropriations, followed by departure fees and facilitation fees.

**Attractions**

The 713 attractions surveyed were those U.S. members of the International Association of Amusement Parks and Attractions, which included well over 500 amusement parks, theme parks and attractions. Of the 713 surveyed, 193 returned completed questionnaires for a response rate of 27%.

**Importance of and Involvement with International Tourism**

Just under half of the attractions mentioned that international travel and tourism to the U.S. is important to their organization -- 20% said it was very important and 27% somewhat.
Only 16% are currently involved in the international travel and tourism market. Of the 84% who are not, only 21% indicated an interest in becoming involved.

Of those attractions who responded to the survey and who are involved in the international tourism market (a much smaller group than those who responded to the survey), more than half of them (58%) are aware of USTTA. Awareness of Marketing, Research and Policy is 61%, 51% and 40%, respectively.

Marketing

Awareness by the attractions of the various marketing programs/services is high with the exceptions of three programs -- international congress programs, gateway reception service and disaster relief financial assistance program. Trade shows (domestic and international), travel missions and trade/tour development are the programs for which attractions are most aware. Usage of these programs/services is low with trade shows having the strongest usage. Although usage is low, attractions are overall satisfied with the marketing programs/services.

Research

There is a general awareness of Research’s publications but usage is very low. As with Marketing, attractions are satisfied with the research publications.

Policy

Attractions are aware of Policy’s activities but it is
minimal. As with Marketing and Research, attractions are satisfied with Policy activities.

USTTA Funding

Attractions believe the U.S. Government should make expenditures on programs related to international tourism to the U.S. The majority felt USTTA’s funding should come from appropriations and facilitation fees, followed by departure fees and bed taxes.

Lodging

Owner/operator/marketing companies from the American Hotel and Motel Association were surveyed for the lodging component of the travel industry. Of the 710 companies surveyed, 202 returned completed questionnaires for a 29% response rate.

Importance of and Involvement with International Tourism

The majority of lodging respondents feel that international travel/tourism to the U.S. is important to their organization -- 61% felt it is very important and 33% said somewhat important.

Nearly two-thirds (65%) are currently involved in the international travel and tourism market. Of the 35% who are not, two-thirds of them are interested in getting involved.

The majority of them (91%) work with state tourism offices, CVB’s and international tourism promotion agencies when dealing with the international market.

A large portion (81%) of the lodging industry surveyed
is aware of USTTA. Not as many are aware of the specific functions at USTTA -- 64% are aware of Marketing, 57% for Research and 36% for Policy.

**Marketing**

With only one exception, the lodging industry’s awareness of the numerous Marketing programs/services is high, especially for trade shows (95%), Pow Wow - USA (94%), travel missions (87%), travel agent (85%) and journalist (83%) familiarization programs and promotional literature (79%). The only program with very low awareness is disaster relief financial assistance program (29%), which is expected due to the nature of that program. This is demonstrated in Figures 67 and 68.

Usage is very high for the domestic and international trade shows, more so for Pow Wow - USA (70%) than international (54%). Some programs have moderate usage while others have very low usage; the latter include cooperative trade and consumer advertising, international congress programs, gateway reception programs, disaster relief financial assistance program, and marketing outreach. (See Figures 67 and 68.)

For the programs the lodging industry is most aware of, the value scores were high, as shown on Figures 69 and 70.

The overall quality of the marketing programs was rated a 4.13.
FIGURE 67

Lodging Establishments
Awareness/Usage Int'l Marketing Programs

- Trade Shows
- Travel Missions
- Travel Agent Fam
- Journalist Fam
- Promo Literature
- Travel Agent Seminars
- Mktg Asst/USTTA
- Trade/Tour Develop.
- CIS Centers
- Coop Consumer Adv
- Coop Trade Adv

Awareness
Usage

0%  50%  100%

186
Lodging Establishments Awareness/Usage U.S. Marketing Programs

- Pow Wow - USA: 70% Awareness, 10% Usage
- Mktg US Tourism: 65% Awareness, 15% Usage
- Answering Requests: 85% Awareness
- Int'l Tourism Conf: 60% Awareness, 15% Usage
- Marketing Outreach: 35% Awareness
- Tourism USA: 50% Awareness, 10% Usage
- Gateway Reception: 75% Awareness
- Int'l Congress: 40% Awareness
- Disaster Relief: 20% Awareness, 10% Usage
FIGURE 69

Lodging Establishments
Value of Int'l Marketing Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Value Score (1-6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Shows</td>
<td>5.43</td>
</tr>
<tr>
<td>Trade/Tour Develop.</td>
<td>5.07</td>
</tr>
<tr>
<td>Travel Missions</td>
<td>5.07</td>
</tr>
<tr>
<td>Travel Agent Seminars</td>
<td>5</td>
</tr>
<tr>
<td>Travel Agent Fam</td>
<td>4.92</td>
</tr>
<tr>
<td>Journalist Fam</td>
<td>4.79</td>
</tr>
<tr>
<td>Mktg Asst/USTTA</td>
<td>4.76</td>
</tr>
<tr>
<td>CIS Centers</td>
<td>4.46</td>
</tr>
<tr>
<td>Coop Trade Adv</td>
<td>4.33</td>
</tr>
<tr>
<td>Coop Consumer Adv</td>
<td>4.33</td>
</tr>
<tr>
<td>Promo Literature</td>
<td>4.33</td>
</tr>
</tbody>
</table>
FIGURE 70

Lodging Establishments
Value of U.S. Marketing Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pow Wow USA</td>
<td>5.2</td>
</tr>
<tr>
<td>Marketing Outreach</td>
<td>5.17</td>
</tr>
<tr>
<td>Gateway Reception</td>
<td>5</td>
</tr>
<tr>
<td>Marketing US Tourism</td>
<td>4.92</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>4.67</td>
</tr>
<tr>
<td>Tourism USA</td>
<td>4.57</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>4.5</td>
</tr>
<tr>
<td>Int'l Tourism Conf.</td>
<td>4.36</td>
</tr>
</tbody>
</table>

Average Value Score (1-6)
Overall, the lodging industry is satisfied with the marketing programs, but only somewhat; 13% were very satisfied and 11% were not satisfied.

**Research**

The lodging industry is well aware of Research’s publications with more than half of them aware of all publications. As shown in Figure 71, usage of these publications is moderate. The highest usage (49%) is for the *Summary and Analysis*. The In-Flight Survey only has 21% usage, which could probably be higher if they were more aware of the accommodation information available there.

The value placed on the programs being used was high. (See Figure 72.)

There is overall satisfaction with Research’s publications by the lodging industry -- 25% are very satisfied though 65% are only somewhat satisfied.

When asked for comments/suggestions for improving the usefulness of the research information, most of the suggestions dealt with improving/changing the methodology.

**Policy**

The lodging industry’ awareness of Policy’s activities varies, as illustrated in Figure 73. It is highest for U.S.-Canada free trade agreement (58%), world’s fairs/expositions (49%), bilateral tourism agreements (45%) and GATT (41%). The lowest awareness was for minority tourism development (12%).
FIGURE 71

Lodging Establishments Awareness/Usage Research Publications

<table>
<thead>
<tr>
<th>Category</th>
<th>Awareness</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary &amp; Analysis</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Canadian Travel</td>
<td>80%</td>
<td>33%</td>
</tr>
<tr>
<td>Recap</td>
<td>70%</td>
<td>40%</td>
</tr>
<tr>
<td>Outlook</td>
<td>71%</td>
<td>42%</td>
</tr>
<tr>
<td>Economic Impact</td>
<td>75%</td>
<td>37%</td>
</tr>
<tr>
<td>Answering Requests</td>
<td>56%</td>
<td>15%</td>
</tr>
<tr>
<td>In-Flight Survey</td>
<td>59%</td>
<td>21%</td>
</tr>
<tr>
<td>Pleasure Travel</td>
<td>54%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Lodging Establishments
Awareness of Policy Activities

<table>
<thead>
<tr>
<th>Policy Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>US/Canada Free Trade</td>
<td>58%</td>
</tr>
<tr>
<td>World's Fairs/Exp.</td>
<td>49%</td>
</tr>
<tr>
<td>Bilateral Agreements</td>
<td>45%</td>
</tr>
<tr>
<td>GATT</td>
<td>41%</td>
</tr>
<tr>
<td>Air Transport Neg.</td>
<td>33%</td>
</tr>
<tr>
<td>Side Letters</td>
<td>30%</td>
</tr>
<tr>
<td>Tourism Policy Council</td>
<td>29%</td>
</tr>
<tr>
<td>Facilitation Policy</td>
<td>28%</td>
</tr>
<tr>
<td>Rural Tourism</td>
<td>22%</td>
</tr>
<tr>
<td>EC '92</td>
<td>22%</td>
</tr>
<tr>
<td>Minority Tourism</td>
<td>12%</td>
</tr>
</tbody>
</table>
Value scores of 5 or more were placed on bilateral tourism agreements, bilateral trade agreements/side letters and the U.S.-Canada free trade agreement. Also receiving a high score was air transport negotiations. (See Figure 74.)

The lodging industry was satisfied overall with Policy’s activities, mostly only somewhat satisfied.

**USTTA Funding**

A large majority (95%) of the lodging industry believe the U.S. Government should make expenditures on programs related to international tourism to the U.S. They thought USTTA funding should come from appropriations (79%), departure fees (48%), facilitation fees (39%) and bed taxes (10%).

**Other**

The "Other" category consists primarily of various travel trade associations (e.g., Travel and Tourism Research Association, American Car Rental Association, United States Tour Operators Association, Cruise Line International Association, American Society of Travel Agents, etc.) but also includes Government agencies USTTA conducts business with and some other miscellaneous organizations (e.g., Travel and Tourism Government Affairs Council, Airport Operators Council, Institute of the Americas, World Wildlife Fund, etc.). There are a total of 63 organizations which fell into this category, of which 33 returned completed questionnaires. The resulting response rate was 52%.

194
FIGURE 74

Lodging Establishments
Value of Policy Activities

Bilateral Agreements 5.1
Side Letters 5.07
US/Canada Free Trade 5.03
Air Transport Neg. 4.96
Tourism Policy Council 4.67
EC '92 4.53
GATT 4.46
Rural Tourism 4.29
World's Fairs/Exp 3.9
Minority Tourism 3.63

Average Value Score (1 - 6)
Approximately half of the respondents were from the travel trade associations so reference to this group from the "other" category will be made in the following discussion. Due to the small sample size, only a general statement will be presented.

**Importance of and Involvement with International Tourism**

International travel and tourism to the U.S. is important to nearly all of the travel trade associations with two-thirds of them saying they are currently involved in the international travel and tourism market.

The majority of them work with state tourism offices, international tourism promotion organizations or CVB’s when dealing with the international market.

All of them are aware of USTTA, with very high awareness for all three Marketing, Research and Policy function areas.

**Marketing**

Awareness of Marketing’s programs/services is very high, even for the three programs areas which normally have low awareness (international congress programs, gateway reception service and disaster financial assistance program).

Usage of these programs/services is moderate with marketing assistance from USTTA’s foreign offices and the manual *Marketing U.S. Tourism Abroad* being used the most frequently. Overall, the trade associations are satisfied
with Marketing’s programs.

Research

Awareness and usage of the Research publications is substantial. There is overall satisfaction with Research’s publications.

Policy

Awareness of Policy’s activities is rather high with two exceptions -- EC’92 and minority tourism development. There is overall satisfaction with Policy’s activities.

USTTA Funding

Nearly all trade associations believe the U.S. Government should make expenditures on programs related to international tourism to the U.S. The majority felt USTTA should be funded through appropriations. Other smaller mentions were for departure and facilitation fees for funding USTTA.
CHAPTER 5
CONCLUSIONS AND RECOMMENDATIONS

Conclusions

The Conclusions will focus on how the five purposes for conducting this research (Chapter 1) were satisfied. Each purpose will be addressed separately with a discussion summarizing the results.

Purpose 1: Determine who, in the travel and tourism industry (customers), is aware of USTTA and its various programs, services, and activities.

The majority of travel and tourism industry groups are aware of USTTA as a whole and its three functional areas of marketing, research, and policy. The lone exception are car rental companies, where awareness of USTTA is very low. This may be due in part to their indirect dealings with USTTA (e.g., dealing with state tourism offices on familiarization trips and/or tour development). Furthermore, car rental companies are also members of Visit USA Committees and their responses are therefore reflected in that industry groups' responses.

For USTTA as a whole, the industry sectors with the highest awareness levels can be found among the states/regions, cruise lines, city convention and visitors bureaus, Visit USA Committee members, research firms, airport authorities, and the "other" category (which includes miscellaneous government agencies, travel trade
associations, and miscellaneous customers of the Policy function area).

However, awareness of the individual programs and services differs by industry group. For all 20 marketing programs/services, states/regions had the highest awareness levels of all industry sectors. On average, states/regions were followed by city CVB’s and Visit USA Committee members. Some programs, however, had high awareness levels from other industry groups. For example, lodging establishments were well aware of familiarization programs for both travel agents and journalists. This is not surprising, since accommodations play a major role in familiarization trips.

Overall, the majority of industry groups were aware of a range of marketing programs/services. The programs which the industry groups had the least awareness of were: international congress programs, gateway reception service, and the disaster relief financial assistance program. Considering these programs impact the least number of industry groups, it is not unusual that awareness levels would be low.

For the eight Research publications/services, states/regions had exceptionally high awareness levels followed by city CVB’s and research firms. All industry groups, however, had relatively high awareness levels for all of the Research publications; car rental firms were the only exception.
Of the three function areas, industry groups are least aware of the policy functions and its activities. This is understandable since the activities performed by the policy function have limited direct involvement with the majority of the travel and tourism industry. Their activities have a large impact on the industry as a whole but not directly on specific industry sectors. The "other" industry group, which houses the key organizations with which Policy works, expressed the highest awareness levels for the various policy activities, although the awareness levels do not approach the high levels of awareness expressed by the industry groups for the marketing and research programs.

**Purpose 2: Determine who is using the programs and services being offered.**

As with awareness, usage of the various marketing, research, and policy programs/services differs by industry group. Those programs/services with the most impact on a particular industry group are generally the groups which are the heaviest users.

For the marketing programs, states/regions, Visit USA Committee members and city CVB’s are the heaviest users of marketing programs overall. Therefore, these would be the primary customers for Marketing. States/regions are the heaviest users of the largest number of marketing programs. With the exception of trade shows (domestic and international), all other programs/services had low usage.
levels by all other industry groups.

The biggest users of the research publications are states/regions; for the majority of research publications, the other major users are research firms, city CVB’s, and "other". Together, these would be the primary customers for Research. Each industry group has one or two research publications which they use the most. As an example, airlines use the In-Flight Survey and Summary and Analysis reports more than any other Research publication; this stands to reason since the In-Flight Survey is directly impacted by the airlines’ participation and involvement. Airline usage of the other Research publications is moderate. For nearly all groups, the Summary and Analysis is the most frequently used publication.

For the Policy function, the activities are not "usable" so no discussion is warranted.

Purpose 3: Determine the perceived value of the programs and services by those who are using them.

It should be noted that the average scores discussed in Chapter 4 should be used as only a guideline, since some of the programs had a small number of responses. It should be kept in mind that these small numbers of responses can lead to distorted interpretations. Nonetheless, in nearly all cases, the value scores given to the various programs/services in all three function areas is relatively high. This is the case even for those programs which do not
have heavy usage. Scores on the low end of the scale hover around the mid-point level of 3.5. These scores generally apply to programs which do not directly impact a particular group. Two examples of this are rural tourism for city CVB’s and cooperative trade advertising for research/consulting firms. Other programs which received low scores are those for which USTTA no longer has a strong presence, e.g., international congress programs, and world’s fairs and expositions; these scores were still not very low. All in all, none of the programs received scores low enough to warrant consideration of dropping.

**Purpose 4:** Determine how improvements can be made in the three function areas (marketing, research, policy) to better meet the needs of the industry.

This is a critical area for USTTA in following up with the customer focus of TQM (knowing who the customers are and their needs). From the previous discussions, who the customers are has been determined. The second part of the TQM customer focus is knowing what the customers’ needs are. In this case, customers were asked to provide suggestions and areas for improvement. Within each of the three function areas, some very valid suggestions were offered.

For the Marketing function, the primary users commented that USTTA needs a larger budget so that more money can be spent on specific programs. This is an action that USTTA agrees would definitely improve programs. Unfortunately,
budgetary limitations are placed on the Agency by other
government entities, including the U.S. Department of
Commerce budget office, the Office of Management and Budget, and Congress. USTTA can ask for increased funding, which it always does, but in the end, the budget is generally cut by these other entities.

Also suggested by the primary users, more often by states/regions, was that USTTA be more responsive to their needs. This includes simple courteous responsiveness like returning phone calls and not putting them on hold to the more complicated suggestion of producing programs that are appropriate or specific enough for their particular needs. The former items are easily accomplished; the latter is not since it would require funding and more individualized attention from a limited staff.

Also suggested by Marketing’s primary customers, most often by city CVB’s, is to make USTTA’s assistance more targeted or regionalized. This ties in somewhat with the above suggestion of being more responsive by producing programs that are appropriate or specific enough for individual users’ needs. Again, with USTTA’s limited budget, there is insufficient funding to regionalize its promotional efforts. USTTA relies on the destinations to provide the destination promotions while USTTA, when funds are available and in cooperative efforts with destinations, promotes the United States as a whole.
The last most frequently mentioned suggestion by Marketing’s primary customers concerns specific program or promotional suggestions. Since these suggestions were quite diverse, they will have to be addressed separately and given their due attention and merit.

For the Research function, the most often mentioned suggestion by the primary users is to improve or change the methodology of the research or the types of data that should be collected. As cited above for Marketing, these suggestions were quite diverse and will have to be addressed separately and given their due attention/merit.

Also offered as a suggestion by its primary users, but not as frequently, was for Research to improve the distribution of the data since it is not as accessible or as easy to obtain as it should be. USTTA’s research publications are available from USTTA or its marketing agent (U.S. Travel Data Center). Until a few years ago, it was only available from USTTA directly. Having a marketing agent allows USTTA to get the publications to users in a more timely manner since they can invoice customers. However, this method is not currently permitted by a government agency (where a check is required before sending any publications). This system of having a marketing agent was initiated at the embryonic stages of USTTA when this survey was mailed. As it gains greater availability, and hence, acceptance, it is anticipated that the distribution
problem will be satisfactorily corrected. Other alternatives are also available, i.e., having USTTA publications available at libraries, universities, and government bookstores.

Other Research users complain that USTTA’s data is old or out-dated by the time it is published. This is indeed a problem for which USTTA is well-aware. Unfortunately, USTTA relies on other entities, most commonly other government agencies, for some of its data. This causes delays in USTTA releasing its data if the data provided by other entities is late.

By far, the comments and/or suggestions offered for the Policy function dealt with different ways of easing the entry process for travelers into this country; the importance of this is also borne out in the high value rating placed on facilitation policies. There are many ways in dealing with easing the burden of international travelers; the Policy function is actively working with the other government entities who are also involved with these activities. Easing the relations between both Canada and Mexico and the U.S. was also mentioned, whether via "open skies" or with facilitating travel between these neighboring countries.

Purpose 5: Determine whether the U.S. government should be expending money on programs related to international tourism to the U.S. and, if so, from where the funds should come.
As requested specifically from the Office of Management and Budget to determine if the travel and tourism industry felt government funds should be spent on programs related to international tourism to the United States, the industry overwhelmingly voiced agreement that this type of spending should be made. All industry groups, in large numbers, felt that the current method of funding is the most appropriate — appropriations from U.S. general tax revenues. No further action is likely from the Office of Management and Budget with overwhelming approval of the status quo.

Recommendations

The following specific recommendations are made to increase the customer base and improve the programs/services provided. Recommendations are divided into actions which can begin almost immediately, and are listed separately for the three function areas. Recommendations for the future are also shown, and are focused on total quality management/customer issues.

**Current Recommendations**

**Marketing**

To alleviate the frustrations many users appear to have with USTTA’s inability to provide more assistance to their individual needs, it is recommended that more education take place. The underlying need is more funding. Since it is likely that USTTA will always be struggling for more money and will never seem to have enough to do what everyone
wants, USTTA should re-evaluate its mission and determine just what it can do with limited funding. Then the industry should be educated on those limitations and be made to understand why regional promotions or specific programs for their individual needs cannot be handled.

Tied into the above, another recommendation is to continue to educate Congress and the other budgetary entities on the importance of tourism so they are more aware of its economic benefit; this may also lead to increased funding for USTTA in the future. USTTA’s constituents should be encouraged to do the same since it will ultimately benefit them in the end.

For the International Tourism Conference program, which could impact a broader group of the travel and tourism industry, more effort should be made to invite them to participate in the conference. This is a program which could benefit a wide audience but may not be given the attention of attracting more "users". Awareness and usage is low for many sectors. Currently, airlines and car rental companies have very low awareness levels for this conference yet representatives from these organizations would benefit by attending. Organizations from these industry groups should be solicited.

Marketing should work more with receptive tour operators to increase their awareness of the gateway reception service. This program, where available, is one
which could enhance the offerings made by tour operators.

USTTA needs to make a decision on whether to continue or drop the International Congress Program. Awareness is moderate, usage is low and the value is above the mid-point. However, the value score for city CVB’s was very low and they would be the primary benefactors of this program. If a decision is made to continue the program, then enough funding should be appropriated and the program should be promoted.

Lodging establishments have low usage of USTTA programs/services. It should be determined through research whether they really are involved with the USTTA programs; they could be using the programs through state tourism offices and not know it is a USTTA program. If they are not taking advantage of USTTA’s programs, more effort should be taken to create awareness of the benefits derived by using the programs/services.

Research

Since car rental companies could benefit from the data available through the Research office, in particular the In-Flight Survey, more effort should be made to educate them on the available data and how it can benefit their organizations. This would boost the usage of research publications by car rental companies.

Related to this, a strong effort should be taken by USTTA’s marketing agent, the U.S. Travel Data Center, to
build up usage of the Research publications, especially the In-Flight Survey and Pleasure Travel Market studies. USTTA needs to strongly encourage them to actively promote these publications. USTTA can also add to this effort by making more presentations at appropriate venues to educate the industry on the research available to help their international efforts.

USTTA should work more closely with its field offices to strengthen their knowledge of the research publications, especially the In-Flight Survey and Pleasure Travel Market studies. Since the field offices have direct contact with the Visit USA Committee members, this will help in educating the Visit USA Committee members and bring their usage of the publications to higher levels.

USTTA should look into making the Research data available at libraries, universities, or through government offices/bookstores to allow more customers to have access to the data.

USTTA should work with the other government agencies it relies on for data to speed up their processes in delivering the required data to USTTA. This will allow USTTA data to be released in a more timely manner.

Policy

USTTA should educate the industry more on the benefits of rural tourism via conferences, seminars, and workshops.

USTTA should open the communication with the field
offices on their policy activities in order to keep Visit USA Committee members more aware and knowledgeable of the activities.

**Future Recommendations**

**Total Quality Management -- Customer Focus**

USTTA should conduct a follow-up survey of known users to get their specific needs and expectations about individual programs. USTTA should then measure, on a regular basis, how well the programs are meeting the customers' needs and expectations. The follow-up study should also strive to learn more about customers' basic desires (e.g., quick response to phone calls, knowledgeable employees, etc.), in addition to soliciting their suggestions for improvement. These follow-up surveys need to be directed to the appropriate users, rather than to the President of each organization and then filtering down to others in the organization.

To improve relationships with customers, USTTA should look for opportunities to communicate with them; this would include getting on the agenda for meetings, conferences, seminars, and workshops which these customers hold. USTTA should welcome any opportunity made available to communicate and educate its customers for continued good relations.
REFERENCE LIST


APPENDIX A: COVER LETTER FOR FIRST MAILING
August 9, 1991

Dear Travel Industry Colleague:

The United States Travel and Tourism Administration (USTTA) is embarking on a management philosophy of providing quality products and services to our customers. We recognize YOU as one of our customers and would like to know what you think about our programs. Your input will help us better understand how we are meeting your needs and in what other areas you think we should be involved.

I would appreciate you taking the time to complete the enclosed survey. We, at USTTA, are all committed to quality and are very interested in knowing what you and others in your organization think about our programs and services. Please work with them to complete this survey in as much detail as possible. Please be candid with your comments and thoughts.

Your responses will remain confidential. However, if you would like to discuss them with me, please indicate so in the space provided at the end of the survey. I will contact you directly should you elect this option.

Thank you very much for your time and cooperation. We intend to take your comments seriously.

Sincerely,

[Signature]
John G. Keller, Jr.
Under Secretary for Travel and Tourism
APPENDIX B: QUESTIONNAIRE
USTTA TRAVEL INDUSTRY EXECUTIVES SURVEY QUESTIONNAIRE

Please take the time to answer this survey for the United States Travel and Tourism Administration (USTTA) to help us understand how we are meeting your needs and how we can better serve you. Your comments will be used to improve the Agency's programs.

If you are not aware of USTTA, please answer the first few questions and return the survey in the enclosed envelope. If you are aware of USTTA, please answer as much as you can and share it with others in your organization who are also familiar with USTTA in order to answer the questions. We are interested in getting comments from all of those in your organization who are familiar with USTTA.

If there is not enough room to respond to some questions, please feel free to continue on a separate sheet of paper.

PLEASE NOTE: Throughout this survey there is reference to "international travel and tourism". For purposes of this survey, this refers solely to international travel to the United States.

1. How important to your organization is international travel and tourism to the United States? (Please check one answer.)
   - Very Important
   - Somewhat Important
   - Not Important

2. Is your organization currently involved in the international travel and tourism market in, for example, promoting a U.S. product or service to foreign travelers, collecting international travel/tourism information, dealing with international tourism policy issues, or some other manner? (Please check yes or no.)
   - Yes (Please skip to question 3)
   - No (Continue with question 2a below)

2a. Would your organization be interested in getting involved in the international travel and tourism market? (please check yes or no)
   - Yes (Continue with questions 2b and 2c)
   - No (Thank you for your help! Please skip directly to question 2d on next page)

2b. What is keeping your organization from entering this market?
   (Use the following spaces for your response)

   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

PAPERWORK BURDEN STATEMENT: Public reporting burden for this collection of information is estimated to average 20 minutes per response, including the time for reviewing instructions and completing the questions. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the Office of Research, U.S. Travel and Tourism Administration, Washington, D.C. 20230; and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Washington, D.C. 20503 - Attn: Paperwork Reduction Project 0605-0024.
2c. What assistance, if any, would help your organization get involved in this market? (Use the following spaces for your response)

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

2d. Thank you for your cooperation. Without answering any additional questions, please mail this questionnaire in the enclosed envelope or mail to:

USTTA Travel Industry Executives Survey
P.O. Box 14267, Washington, D.C., 20044-4267

3. Does your organization work with state tourism offices, international tourism promotion organizations or city convention and visitor bureaus when dealing with the international market? (Please check yes or no)

☐ Yes  ☐ No

4. Are you, or anyone else in your organization, aware of the United States Travel and Tourism Administration (USTTA)? (Please check one response)

☐ Aware of USTTA............. .. (Continue with question 5.)
☐ Not Aware of USTTA........ (Thank you for your comments. Please mail this questionnaire without answering any additional questions to the address specified in question 2d above.)

5. Are you, or anyone in your organization, aware of the following USTTA program functions? (Please respond with a check for each of the functions.)

<table>
<thead>
<tr>
<th>Functions</th>
<th>Aware</th>
<th>Not Aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Research</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Policy</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

(If AWARE of ONE or MORE of the 3 functions, continue on with the rest of this questionnaire.)

(If NOT AWARE OF ANY of the 3 functions, please mail this questionnaire without answering any additional questions to the address specified in question 2d above or in the return envelope provided.)

In the questions on the following pages we address the three USTTA program functions: Marketing, Research and Policy. In responding to these questions, please involve the staff in your organization who deal with these areas for the international market.
I. USTTA's MARKETING FUNCTION

6. The list below represents USTTA marketing services and programs. For each of these services, please tell us if you are aware of or have used the service, and if you have used the service, how valuable it is to your organization:

(If you are not aware of the service, check the box in column 1)
(If you are aware of the service but have not used it, check the box in column 2)
(If you are aware of the service and have used it, check the box in column 3)
(If you check column 3, circle the rating in column 4 that best describes how valuable the service is to your organization)

<table>
<thead>
<tr>
<th>USTTA SERVICES IN THE INTERNATIONAL MARKETPLACE</th>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
<th>Column 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Cooperative Trade Advertising</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Cooperative Consumer Advertising</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Travel Agent Familiarization Programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Journalist Familiarization Programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Travel Agent Seminars and Workshops</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Trade/Tour Development Programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(development of U.S. tour products for sale by international wholesalers/retailers)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Travel Missions (U.S. suppliers present and sell the U.S. product in foreign markets)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Trade shows (Pow Wow-Europe, World Travel Market, ITB, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>i. Consumer Information Service Centers</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>j. Marketing Assistance from USTTA Foreign Offices</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(advice, counseling, answering questions, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>k. Promotional Literature (brochures, posters, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>l. International Congress Programs</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>(soliciting international convention/congress selection of U.S. venues)</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>m. Gateway Reception Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(travel assistance to international travelers at major airports)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n. Disaster Relief Financial Assistance Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(for international promotion needs of states having experienced a disaster)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o. Marketing Outreach Programs (seminars, workshops, conferences)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. International Tourism Conference</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>(held in February; formerly State/City Oats)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>q. Pow Wow - USA (Discover America International Pow Wow)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>r. Marketing U.S. Tourism Abroad</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(a manual of cooperative marketing programs in USTTA markets)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>s. Tourism USA: Guidelines for Tourism Development Manual</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>t. Service of answering information requests from the trade and public</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7. How would you rate the overall quality of USTTA's marketing programs and services listed on the previous page? (Please rank the quality on a scale of 1 to 6 with 6 being "high quality" and 1 being "low quality.")

<table>
<thead>
<tr>
<th>High</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

8. How satisfied are you overall with USTTA's marketing programs and services in meeting your needs? (Please check appropriate response)

- [ ] Very Satisfied
- [ ] Somewhat Satisfied
- [ ] Not Satisfied

9. Please share with us any comments or suggestions you have to improve USTTA marketing programs and services to increase their usefulness to you in your efforts to market to international travelers.

_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________

10. Do you think the U.S. Government should be involved with and expend money on promoting international tourism to the United States? (Please check one response)

- [ ] Strongly Agree
- [ ] Agree
- [ ] Disagree
- [ ] Strongly Disagree

11. To better understand the needs of the market, we would like to know how your organization promotes to the international market. From the list below, please check all activities your organization uses to promote international travel to the U.S. (Please check all appropriate responses.)

- [ ] Trade Advertising
- [ ] Consumer Advertising
- [ ] Familiarization Trips
- [ ] Seminars and Workshops
- [ ] Press and Public Relations
- [ ] Travel Missions
- [ ] Trade/Tour Development
- [ ] Trade Shows
- [ ] Promotional Literature
- [ ] Maintain Offices and/or Representatives Abroad
- [ ] Other (Please specify)
II. USTTA’s RESEARCH FUNCTION

12. The list below represents USTTA research publications or services. For each of these publications or services, please tell us if you are aware of or have used the publication or service, and if you have used the publication or service, how valuable it is to your organization:

(If you are not aware of the publication or service, check the box in column 1)

(If you are aware of the publication or service but have not used it, check the box in column 2)

(If you are aware of the publication or service and have used it, check the box in column 3)

(If you check column 3, circle the rating in column 4 that best describes how valuable the publication or service is to your organization)

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
<th>Column 4 - Value of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOT AWARE</td>
<td>Aware but</td>
<td>Aware &amp;</td>
<td>Value of Service Circle 1-6</td>
</tr>
<tr>
<td>of Service</td>
<td>HAVE NOT</td>
<td>HAVE Used</td>
<td>only if you checked column 3</td>
</tr>
<tr>
<td></td>
<td>Used</td>
<td>Service</td>
<td>High Low</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PUBLIC INQUIRIES

a. Answering information requests from the public and trade □ □ □ 6 5 4 3 2 1

MARKET RESEARCH SURVEYS

b. In-Flight Survey of International Air Travelers □ □ □ 6 5 4 3 2 1
c. Pleasure Travel Market Survey (Consumer Behavior Studies) □ □ □ 6 5 4 3 2 1

INTERNATIONAL TRAVEL STATISTICS/SPECIAL PROGRAMS
d. Summary and Analysis of International Travel to the U.S. (data on arrivals to the U.S.) □ □ □ 6 5 4 3 2 1
e. Canadian Travel to the U.S. □ □ □ 6 5 4 3 2 1
f. Recap of International Travel To and From the U.S. □ □ □ 6 5 4 3 2 1
g. Impact of Foreign Visitors’ Spending on State Economies □ □ □ 6 5 4 3 2 1
h. Outlook for International Travel To and From the U.S. (forecasts) □ □ □ 6 5 4 3 2 1

13. How satisfied are you overall with USTTA’s Research publications/services in meeting your needs? (Please check one response)

□ Very Satisfied  □ Somewhat Satisfied  □ Not Satisfied

14. Please share with us any comments or suggestions you may have on what we can do to help you better understand the international traveler to the U.S. and the market conditions in primary international markets. Include suggestions that would help us improve the usefulness of the information provided in the Research programs at USTTA. (Use the following spaces for your response)
15. Do you think the U.S. Government should be involved with and expend money on collecting international travel/tourism statistics and research information? (Please check one response)

- [ ] Strongly Agree
- [ ] Agree
- [ ] Disagree
- [ ] Strongly Disagree

16. Which of the following research sources do you use in developing your international marketing strategies? (Please check all that apply.)

- [ ] NONE
- [ ] Private consulting firms
- [ ] Internal sources/research
- [ ] USTTA
- [ ] Other U.S. Government agencies
- [ ] State tourism offices
- [ ] City convention and visitor bureaus
- [ ] National tourism offices/organizations
- [ ] Other (Please specify)

III. USTTA's POLICY FUNCTION

17. For each of the tourism policy activity areas below, please indicate your awareness by circling “yes” or “no” under the “Awareness” column. Then for the activities you are aware of, please rate the value you place in it by circling a number between 1 and 6, with 6 corresponding to “high” value and 1 corresponding to “low” value.

<table>
<thead>
<tr>
<th>POLICY ACTIVITIES</th>
<th>Awareness</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>High</td>
</tr>
<tr>
<td>a. Bilateral Tourism Agreements (facilitates tourism between the U.S. and another country)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>b. Bilateral Trade Agreements and Tourism Side Letters (reduces tourism trade barriers between the U.S. and another country)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>c. Rural Tourism Initiative (works to develop and promote tourism in rural areas)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>d. General Agreement on Tariffs and Trade (GATT) Negotiations on Services (participates in developing U.S. negotiating position and chairs Tourism Working Group)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>e. EC '92 Interagency Task Force (participates in tourism-related activities with respect to creation of a single EC market)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>f. U.S. - Canada Free Trade Area Agreement (implements tourism annex of agreement)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>g. Minority Tourism Development (joined with MBDA to stimulate minority business development through tourism)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>h. Tourism Policy Council (coordinates Federal agency policies/programs that have a significant effect on tourism)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>i. World's Fairs and International Expositions (coordinates international expositions in the U.S.)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>j. Facilitation Policies (includes supporting such programs as Visa Waiver Pilot Program, Advanced Passenger Information Service, machine-readable passports, INS pre-inspection)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>k. Air Transport (CIVAIR) Negotiations (coordinating with other U.S. agencies to have tourism interests promoted)</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

18. How satisfied are you overall with USTTA’s Policy activities in meeting your needs? (Please check one response)

- [ ] Very Satisfied
- [ ] Somewhat Satisfied
- [ ] Not Satisfied
19. Please share with us any comments or suggestions you have on what we can do to facilitate your organization's policy and marketing support requirements. Include suggestions that would help us improve the usefulness of USTTA's Policy activities to your organization. (Use the following spaces for your response)

[Blank spaces for response]

20. Do you think the U.S. Government should be involved with and expend money on international tourism policy issues? (Please check one response)

- [ ] Strongly Agree
- [ ] Agree
- [ ] Disagree
- [ ] Strongly Disagree

21. What international tourism policy issues are important to your organization, besides those listed in Question 17? (Use the following spaces for your response)

[Blank spaces for response]

IV. GENERAL QUESTIONS

22. Do you believe the U.S. Government should make expenditures on programs related to international tourism to the United States? (Please check yes or no)

- [ ] Yes (Please continue with question 23)
- [ ] No (skip question 23 and go on to next page)

23. From the list below, how do you think USTTA should be funded? (Please check all the approaches you think would be appropriate.)

- [ ] Facilitation fee paid by airlines and cruise lines for all international visitors carried to the U.S.
- [ ] Bed tax on international visitors collected by U.S. lodging establishments
- [ ] Departure fee on all individuals leaving the U.S. (for business or pleasure)
- [ ] Appropriations from U.S. general tax revenues
- [ ] Other (Please specify)

[Blank space for other input]

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

Thank you for completing this survey. Your comments and suggestions will be used to improve the Agency's programs.
PLEASE MAIL THIS SURVEY IN THE ENCLOSED ENVELOPE OR MAIL TO:

USTTA Travel Industry Executives Survey
P.O. Box 14267, Washington, D.C., 20044-4267

*************************************************

OPTIONAL:

If you would like to be contacted to discuss your comments further, please complete the following information.

NAME: _______________________________ ORGANIZATION: _______________________________

LOCATION: _______________________________ PHONE: (___) ____________

If you have any further comments on the subjects covered by this survey or comments on subjects relating to how USTTA can better meet your needs not covered by the survey, please include them below.
APPENDIX C: COVER LETTER FOR FOLLOW-UP MAILING
August 27, 1991

Dear Travel Industry Colleague:

In my letter to you on August 9 I told you about the United States Travel and Tourism Administration (USTTA) embarking on a management philosophy of providing quality products and services to our customers. As one of our customers, we asked that you complete the enclosed survey and return it to us. If you have already done so, thank you very much for your assistance in helping us to better understand how we can serve your organization's needs. In the event that you have not yet responded to the survey, I urge you to do so now. I have enclosed another copy of the survey in case the earlier copy was misplaced.

I would appreciate you taking the time to complete the enclosed survey. All of us at USTTA are committed to quality and are very interested in knowing what you and others in your organization think about our programs and services. Please work with them to complete this survey in as much detail as possible. Please be candid with your comments and thoughts.

As I mentioned in my first letter, your responses will remain confidential. However, if you would like to discuss them with me, please indicate so in the space provided at the end of the survey. I will contact you directly should you elect this option.

Thank you very much for your time and cooperation. We intend to take your comments seriously.

Sincerely,

John G. Keller, Jr.
Under Secretary for Travel and Tourism
APPENDIX D: STATISTICAL TABLES
### APPENDIX D-1

**AWARENESS OF USTTA AND ITS FUNCTIONS**

<table>
<thead>
<tr>
<th>AWARENESS</th>
<th>total</th>
<th>visit usa</th>
<th>states/regions</th>
<th>city CVB's</th>
<th>research firms</th>
<th>airlines</th>
<th>airports</th>
<th>cruise lines</th>
<th>car rental</th>
<th>train/bus</th>
<th>tour operators</th>
<th>attractions</th>
<th>hotel/motels</th>
<th>other</th>
</tr>
</thead>
<tbody>
<tr>
<td>USTTA</td>
<td>81%</td>
<td>97%</td>
<td>100%</td>
<td>98%</td>
<td>96%</td>
<td>82%</td>
<td>65%</td>
<td>100%</td>
<td>22%</td>
<td>50%</td>
<td>76%</td>
<td>58%</td>
<td>81%</td>
<td>100%</td>
</tr>
<tr>
<td>Marketing Function</td>
<td>79%</td>
<td>91%</td>
<td>100%</td>
<td>88%</td>
<td>85%</td>
<td>56%</td>
<td>74%</td>
<td>100%</td>
<td>22%</td>
<td>66%</td>
<td>66%</td>
<td>61%</td>
<td>64%</td>
<td>89%</td>
</tr>
<tr>
<td>Research Function</td>
<td>74%</td>
<td>80%</td>
<td>100%</td>
<td>89%</td>
<td>93%</td>
<td>53%</td>
<td>74%</td>
<td>100%</td>
<td>6%</td>
<td>60%</td>
<td>67%</td>
<td>51%</td>
<td>57%</td>
<td>95%</td>
</tr>
<tr>
<td>Policy Function</td>
<td>57%</td>
<td>65%</td>
<td>88%</td>
<td>66%</td>
<td>76%</td>
<td>38%</td>
<td>61%</td>
<td>80%</td>
<td>6%</td>
<td>51%</td>
<td>23%</td>
<td>40%</td>
<td>36%</td>
<td>95%</td>
</tr>
<tr>
<td>Services in the International Marketplace</td>
<td>Coop Trade Advertising</td>
<td>Coop Consumer Advertising</td>
<td>Travel Agent Advertising</td>
<td>Travel Agent Seminar Programs</td>
<td>Traveler’s Fam Program</td>
<td>Trade/Tour Development</td>
<td>Trade Missions</td>
<td>Trade Shows</td>
<td>Promotional Literature</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Visit by States/Regions</td>
<td>70%</td>
<td>67%</td>
<td>86%</td>
<td>84%</td>
<td>79%</td>
<td>78%</td>
<td>87%</td>
<td>95%</td>
<td>78%</td>
<td>83%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total Use</td>
<td>73%</td>
<td>70%</td>
<td>86%</td>
<td>84%</td>
<td>79%</td>
<td>78%</td>
<td>87%</td>
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<td>83%</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coop Trade Advertising</td>
<td>70%</td>
<td>67%</td>
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**APPENDIX D-3**

**AWARE OF MARKETING PROGRAMS**

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APPENDIX D-12

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