

**SUPPORTING TRAVEL AND TOURISM
TO GROW OUR ECONOMY AND CREATE
MORE JOBS**

Report to the President

***A National Goal
on the International Arrivals Process
and Airport-Specific Action Plans***

EMBARGOED UNTIL 7 AM E.T. ON FEBRUARY 13

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Letter from Secretary Johnson and Secretary Pritzker

Dear Mr. President:

On May 22, 2014, you signed a Presidential Memorandum calling on the Departments of Commerce and Homeland Security to establish a national goal and airport-specific action plans at our largest airports to enhance the arrivals process for international travelers to the United States. Working together – and in concert with our private sector partners – we will continue to take actions to improve the airport arrival experience for international travelers to the United States and to maximize the economic contribution of travel and tourism while safeguarding our security.

Over the last 5 years, the United States has seen an increase of 19 million annual international travelers. Additional spending by international travelers during this period supported 280,000 new American jobs. This is good news, but every other international destination is competing fiercely with us for international visitors and the jobs they support. First impressions matter, and when overseas travelers arrive at our airports, it is important that they have a positive experience. The safety and security of this country will always come first, but we can and must also ensure that the travel experience continues to be welcoming, friendly, and efficient.

Based on extensive industry outreach and input from hundreds of executives and leaders from airlines, airport authorities, worker representatives, State and local governments, as well as other private and non-federal public stakeholders over the course of the past few months, the attached documents include a number of significant policy achievements that will encourage travelers to choose America as the world's premier tourism destination.

- National Goal to Improve the Arrivals Experience: Based on extensive engagement with industry and input from hundreds of executives and leaders from airlines, airport authorities, worker representatives, and State and local governments, we have developed a new national goal for the United States to provide a best-in-class international arrivals experience as compared to our global competitors to an ever-increasing number of international visitors while maintaining the highest standards of national security. To ensure success, the Departments of Commerce and Homeland Security are establishing a new interagency task force, co-chaired by the Deputy Secretaries of Homeland Security and Commerce, that will engage with a broad array of industry stakeholders to identify the key factors that drive a traveler's perception of the international arrivals experience and decision to travel to the United States.
- 17 Airport-Specific Action Plans Developed In Partnership With Industry: *Action Plans* have been developed through close partnership with airports, airlines and industry, and include significant steps to drive innovation to increase security while simplifying and streamlining the entry process at the top 17 airports, such as:
 - **\$20 million Public-Private Partnership to Install 340 Additional Automated Passport Control Kiosks**. Automated Passport Control (APC) kiosks provide modern touch screen technology which allows passengers to scan their passports

and enter their customs declaration information. 13 locations plan to install 340 additional APC kiosks, representing an additional \$20 million dollar investment by the private sector. U.S. Customs and Border Protection (CBP) and its partners are already well on the way to achieving this goal with 235 new kiosks installed since August 2014. Provided through public-private partnership with airport authorities, these kiosks expedite air passenger inspection for U.S. and Canadian citizens, U.S. Lawful Permanent Residents, and certain other travelers at participating airports, with planned expansion to other temporary visitors for business and pleasure; and reduce officer interaction time by 45% to approximately 30 seconds from 55 seconds, while increasing security by allowing officers to focus on the passenger instead of administrative tasks.

- New Mobile Passport Control (MPC) Technology Launched to Simplify and Accelerate Entry; MPC allows eligible travelers to submit their passport information and customs declaration form through their smartphone or tablet prior to CBP inspection. Based on the successful pilot at the Hartsfield-Jackson Atlanta International Airport, CBP is committed to expanding the availability of the program to the top 20 airports by the end of 2016.
- Modernizing Decades Old Processes, Streamlining Baggage Control Egress, and Eliminating Paper Forms: Among many other steps, CBP is announcing a new commitment to eliminate the need for air passengers to complete the paper 6059b customs declaration form upon arrival by the end of 2016.

The work that our teams have done over the last few months, captured in the attached report, will improve the arrivals process for international travelers. We are committed to establishing the metrics and processes necessary to support ongoing improvement. This initiative will support the combined efforts of the public and private sector to reach your goal of welcoming 100 million international visitors by 2021, who will spend an estimated \$250 billion in our economy.

Secretary Jeh Johnson, Department of Homeland Security

Secretary Penny Pritzker, Department of Commerce

New National Goal and Task Force on Customer Service

In a Presidential Memorandum issued May 22, 2014, President Obama highlighted the important role that the U.S. travel and tourism sector plays in our national economy and in supporting American jobs. Over the past several years, the Administration has continued to focus on opportunities where the U.S. government, in partnership with private sector stakeholders, could improve and facilitate international visitation to the United States—from establishing the Corporation for Travel Promotion, to improving the visa process and travel facilitation at the border, to the development of the National Travel and Tourism Strategy. We stand at a moment where we recognize the great progress made and see the opportunity defined before us. Accordingly, the government and private sector have joined together to set an ambitious national goal to improve the international arrivals experience.

The United States will provide a best-in-class international arrivals experience, as compared to our global competitors, to an ever-increasing number of international visitors while maintaining the highest standards of national security. Together, the public and private sectors endeavor to ensure that legitimate travelers feel secure and welcome and view their arrival experience as the very best as compared to our global competitors.

Our intention is that travelers view their entry into the United States as exemplary while government fulfills its obligation to ensure national security. On an ongoing basis, we will assess the process from the moment visitors step off the plane, through primary passport inspection, until they collect their bags and exit through final baggage inspection. To ensure success, we will continue building on our strong private sector relationships to collaborate on the best approach to enhance the traveler experience, taking into account private and government sector best practices.

To that end, we will establish a federal interagency task force comprised of Department of Homeland Security (DHS) and Department of Commerce (DOC) representatives and co-chaired by the Deputy Secretary of each department. Over the next 12 months, the task force will establish quarterly benchmarks and engage with a broad array of industry stakeholders, including private sector companies with reputations for excellence in customer service and through the U.S. Travel and Tourism Advisory Board. From private sector experts, the task force will seek executable recommendations on how best to measure and improve the traveler's experience during the arrivals process, including a deep assessment of the key drivers of the traveler's experience, the development of traveler surveys to measure performance that will be published, and a methodology for continued assessment. The Administration will use the results of those assessments to inform ongoing improvement of the arrivals process and to ensure we achieve our ultimate goal of attracting 100 million international visitors, who we estimate will spend \$250 billion annually, by the end of 2021.

Stakeholders and members of the public will also be able to review the 17 airport action plans, which will be updated on a quarterly basis. The airport action plans will be posted on a new Travel and Tourism section of CBP.gov and linked to the National Travel and Tourism Office website, which will also host metrics for the top 17 airports. For these airports, DHS and DOC

will regularly publish operational and experiential metrics through terminal level information “dashboards” and traveler experience surveys.

CBP will identify, track, and report on several key metrics to monitor service level improvement and overall success in enabling and facilitating travel and tourism initiatives to improve the experience of international travelers arriving into the United States. As recommended by stakeholders, these dashboards will include metrics calculated at each of the major gateway airports down to the terminal level and will be posted on a monthly basis. The “dashboard” includes metrics such as, travel volume, booth hours staffed, wait time, cycle time, and best practices implemented. In addition, to track progress on traveler perception, the results of traveler surveys will be posted on the National Travel and Tourism Office and CBP websites.

In 2015 and 2016, the Secretaries of Homeland Security and Commerce will provide annual updates on progress to the President.

Summary of Airport-Specific Action Plans

As directed by the President, the Department of Homeland Security and Department of Commerce have worked closely with industry to develop airport-specific action plans that include steps that both private and public stakeholders have pledged to take for the United States to expedite and improve the overall arrivals experience for travelers, taking into account the federal government's responsibility to protect the safety, public health, and national security of the United States and its visitors.

The action plans were developed at local stakeholder meetings at the top 17 airports—accounting for over 73.7% of all international travelers to the United States. Over the last several months, industry stakeholders from across the travel continuum, such as airline station managers, airport directors and their staff, hotel managers, theme park executives, visitor and convention bureau representatives, local elected officials, congressional staffers, and senior representatives from federal agencies such as DHS and DOC participated in stakeholder meetings. Each airport location held at least two meetings during the summer months to develop the action plans, and national level meetings were conducted on three occasions. Senior DHS, CBP and DOC officials also met with airline CEOs, airport directors, and trade group executives throughout the past few months.

Each meeting was focused on addressing the steps we can take to improve the international arrivals process at U.S. airports through actions committed to by both the private and government sectors. The action plans were developed collaboratively with government and private sector partners as a tool to document their commitment to international arrival improvements with robust timelines and clear steps outlined to achieve significant results.

Some highlights include:

- **Technological Innovations to Simplify and Accelerate the Entry Process, including \$20 million of New Private-Sector Investments in Tools that Work.** Through public-private partnerships, CBP is working closely with industry partners to spread the use of technology, like Automated Passport Control (APC), that increases security by allowing officers to focus on the interview rather than administrative tasks, while improving overall efficiency for the traveler.
 - 340 Additional Automated Passport Control Kiosks. Automated Passport Control (APC) kiosks provide modern touch-screen technology which allows passengers to scan their passports and enter their customs declaration information. 13 locations plan to install 340 additional APC kiosks, representing an additional \$20 million dollar investment by the private sector. Provided through public-private

partnership with airport authorities, these kiosks expedite air passenger inspection for U.S. and Canadian citizens, U.S. Lawful Permanent Residents, and Visa Waiver Program travelers at participating airports. They reduce officer interaction time by 45% to approximately 30 seconds from 55 seconds, while increasing security by allowing officers to focus on the passenger instead of paperwork. CBP has devised new technical requirements which permit the expansion of APC kiosk service to other temporary visitors for business and pleasure, in addition to U.S. and Canadian citizens. 11 airports have committed to expanding their APC capabilities to lawful permanent residents and/or visa waiver travelers over the next two years. CBP operational and process changes have enabled airlines and airports to deploy over 539 APC kiosks throughout the country, representing a private sector investment of over \$30 million.

- New Mobile Passport Control (MPC) Technology Launched to Simplify and Accelerate Entry. MPC allows eligible travelers to submit their passport information and customs declaration form through their smartphone or tablet prior to CBP inspection. The application was developed through a public-private partnership between Airports Council International–North America and CBP, and is in operational pilot at the Hartsfield-Jackson Atlanta International Airport. Based on the successful pilot, CBP is committed to expanding the availability of the program to the top 20 airports by the end of 2016. To support the burgeoning growth of mobile apps in the travel industry, many airports have committed to improving Wi-Fi and cellular connectivity in the international arrivals area.
- 2,000 New Mobile Devices to Process Passengers and Cargo More Efficiently. CBP is also committed to leveraging mobile technology to enable CBP officers to process passengers with facility constraints, move cargo more efficiently into the marketplace, and enable some processing to occur at non-traditional ports of entry. CBP is committed to deploying over 2,000 mobile devices across the sea, land, and air ports of entry by the end of fiscal year 2015.

➤ **Modernizing Decades Old Processes, Streamlining Baggage Control Egress, and Eliminating Paper Forms:** Recognizing the need to modernize decades old processes, the Administration is committed to updating existing processes to improve the efficiency of travelers arrival to the United States.

- Streamlining Baggage Control Egress and Eliminating Paper Forms: Having already eliminated the paper forms I-94 and I-94W, CBP will eliminate the need for air passengers to complete the paper 6059b Customs Declaration form upon arrival by the end of 2016. As a result of eliminating paper forms at the point of

primary inspections, CBP, in partnership with airport authorities, will work to eliminate passenger delays at egress points while strengthening our enforcement and agriculture missions in the baggage area. In the short term, CBP is committed to testing both a paperless primary and streamlined egress process by March 2015. By the end of 2016, CBP is fully committed to eliminating the need for passengers to complete the paper form 6059b Customs Declaration upon arrival at all airports.

- Expanding *Express Connect* Program to help More Passengers Make their Connections. The Express Connect program is a low cost innovation by CBP to partner with airlines to identify their customers with short connection time and offer a dedicated process to ensure, whenever possible, that travelers make their connecting flights to other destinations in the United States. This program is currently available at 11 airports and will be expanded to four additional more airports next year.
- More One Stop Programs to Enable Passengers without Checked Baggage to Skip the Baggage Control Queues. At three airports, international passengers with no checked baggage can complete CBP processing at the primary booth and sail directly to a connecting flight or out of the terminal, bypassing baggage claim and customs egress inspection. Two of those airports will expand their “One Stop” hours of operation by the end of the year. An additional nine airports have committed to examining the feasibility of making the infrastructure changes necessary to implement “One Stop”.
- Improving Signage and Upgrading Multimedia. Signage is a significant contributor to an international arrivals experience. Is the signage clear, can travelers understand it, is it in the right place, and does it facilitate traffic or hinder it? Eight airports have committed to review and improve the directional signage for Primary, Global Entry, and Automated Passport Control.
 - *New Electronic Signage at Chicago O’Hare International Airport.* Building off the success of electronic dynamic signage at land borders, CBP is partnering with the Chicago Department of Aviation to install electronic signage in the international arrivals hall by the end of 2015.
 - *Multimedia Monitors.* In 2008, CBP installed monitors to be able to connect with travelers while they wait in line for passport control and customs. Currently, monitors run a Welcome to the United States video, CBP informational videos, and other partner agency announcements. CBP will complete a system refresh by the end of this year to enable updates in the relevance and quality of video programs shown.

➤ **Public-Private Collaboration to Expand Uptake of Efficiency-Creating Policies:**

There are a number of great Trusted Traveler Programs and reimbursable service authorities that could add even greater efficiency to the system through additional uptake. CBP is working closely with industry to increase awareness and outreach around these opportunities.

- Expanding Global Entry. More than 3 million people have access to CBP Trusted Traveler Programs, including Global Entry, which allows expedited clearance for pre-approved, low-risk air travelers upon arrival in the United States. Global Entry is now available at 53 airports and preclearance locations. Over 3 million travelers have Global Entry benefits and have used the kiosks over 12 million times since the program started. CBP has seen consistently high levels of Global Entry use on several travel days, with rates exceeding 9-10 percent. Global Entry is available directly to U.S. citizens, U.S. lawful permanent residents, and nationals of seven other countries. The private sector has been very committed to expanding Global Entry by printing program information in airline magazines, hosting mobile enrollment events at large corporations, and paying Global Entry application fees for top-tier customers.
- Creating additional public-private partnerships to defray costs of meeting increased staffing and overtime needs. In the last two budget cycles, the Administration has requested and Congress has granted new legal authorities for DHS to enter into voluntary partnerships with State, local, tribal, and private sector entities. These partnerships allow DHS to provide increased customs and immigration inspections services on a reimbursable basis at U.S. ports of entry upon request. Five agreements were signed in December 2013. In 2014, DHS finalized five additional partnerships with international gateway airports and sought additional opportunities to expand services and facilities at land and sea ports consistent with the authority granted by Congress. Sixteen selectees for the reimbursable services program were finalized in December 2014..

Economic Significance of Travel and Tourism

Travel and Tourism and the Economy

Travel and tourism is a critical component of the U.S. economy, and has been a leading contributor to U.S. job creation since the economic slowdown of 2009. The travel and tourism industry supports nearly 8 million U.S. jobs, and since Q1 2010, the industry created 757,000 new jobs. Direct employment in the travel and tourism industries increased 1.7 percent in the third quarter of 2014. This represented the 18th consecutive quarter of growth in travel and tourism-related employment. International travel and tourism supports 1.1 million jobs in the United States.

International travel to the United States is a significant driver of services export growth and represents a key opportunity to support economic growth and job creation. Travel and tourism is the largest services export sector, comprising 31 percent of all services exports and 9 percent of all U.S. exports. A record 70 million international visitors traveled to the United States in 2013, a 5 percent increase over 2012, setting a new record for travel and tourism exports at nearly \$215 billion. Passenger fare receipts were up nearly 6 percent, and travel receipts for food, lodging, recreation, gifts, and entertainment were up more than 7 percent over 2012.

U.S. travel and tourism-related exports totaled \$ \$222.3 billion year to date (for preliminary January through December 2014), an increase of nearly 4 percent when compared to the same period last year, resulting in a positive travel trade balance. The U.S. travel and tourism industry produced a record-setting \$78.1 billion trade surplus in 2013, more than double the \$31 billion surplus enjoyed just six years prior, and the largest U.S. travel trade surplus on record.

Projections for growth continue to be positive. Globally, Oxford Economics predicts an optimistic outlook for travel over the next 10 years, with the industry projected to grow 5.4 percent per annum.¹ At the time Oxford Economics developed and issued these projections, China was projected to overtake the United States to become the world's largest outbound travel market in 2014. Yet, according to the United Nations World Travel Organization, China became the world's largest outbound travel market ahead of expectations in 2012, with an expenditure of \$102 billion, and saw an additional 26 percent increase in spending last year to a total of \$129 billion of annual expenditure. Furthermore, Russia, Brazil, India, Indonesia, and Turkey are expected to average more than 5 percent annual growth over the next 10 years. The National Travel and Tourism Office's (NTTO) 2014 Fall Travel Forecast predicts international travel to the United States will continue experiencing strong growth through 2019.

¹ http://www.amadeus.com/web/amadeus/en_US-US/Amadeus-Home/News-and-events/News/04214_Global-travel-industry-set-for-decade-of-sustained-growth/1259071352352-Page-AMAD_DetailPpal?assetid=1319592754833&assettype=PressRelease_C

National Travel and Tourism Strategy

Recognizing the potential for international travel to the United States, President Obama released the National Travel and Tourism Strategy in 2012, setting a national goal of reaching 100 million visitors by 2021. To this end, both the public and private sectors have been working together to generate demand and ensure a positive visitor experience. Brand USA and the Departments of Commerce and State have been working to promote the United States as a travel destination, and are accelerating this process with increasing reach and intensity in key markets. The Administration has contributed to increasing demand in 2014 by adding Chile to the Visa Waiver Program and launching issuance of 10-year business and tourist visas to Chinese citizens.

The National Strategy recognizes the importance of enabling and enhancing travel to and within the United States, and providing a world class customer experience for travelers. The Strategy states, “The federal government can influence many variables that affect the overall quality of a visitor’s travel to the United States.” One of these is the arrivals process.

Significant progress on the arrivals process has been made. Specific efforts to improve customer service at ports of entry have included increased enrollment in trusted traveler programs, deployment of new technology, re-engineering of processes, prioritization of customer service with an emphasis on staff professionalism and measurement of customer satisfaction, and leveraging public-private partnerships. As the Strategy noted, “Through the introduction of risk-based security programs and policies, and by leveraging the latest technologies and intelligence, the federal government can focus its efforts on those passengers more likely to pose a risk, thereby enhancing the travel experience for known and trusted travelers.”

Impacts of Growth of International Travel

Recognizing the importance of security, facilitating the arrival of international travelers is critical to growing our economy and creating jobs. Increasing numbers of visitors translates to increasing export value in travel and tourism between now and 2018. In order to capture the potential value of a growing number of visitors to the United States, we must ensure that we have the resources and processes in place. NTTO’s Forecast of International Travel projects that inbound (total) travel volume to the United States will increase from 69.8 million in 2013 to 88.3 million in 2019, an increase of 18.5 million visitors in six years. Of that increase, 9.8 million will come from overseas markets, of which 95 percent will enter the country through a U.S. air port of entry or pre-clear CBP in a foreign country. An additional 1.2 million are expected to travel to the United States by air from Canada and Mexico, resulting in an estimated 11.0 million travelers per year arriving at U.S. air ports by 2019.

The economic impact of these passengers is significant. Based on NTTO projections, by 2019 these visitors would contribute \$295 billion to our economy, \$80 billion over 2013.

Border processing has been found to have an impact on the economic benefits of travel and tourism. In 2013, the Department of Homeland Security’s analysis of ports of entry found that an increase or decrease in staffing at the ports of entry has an impact on wait times and, therefore,

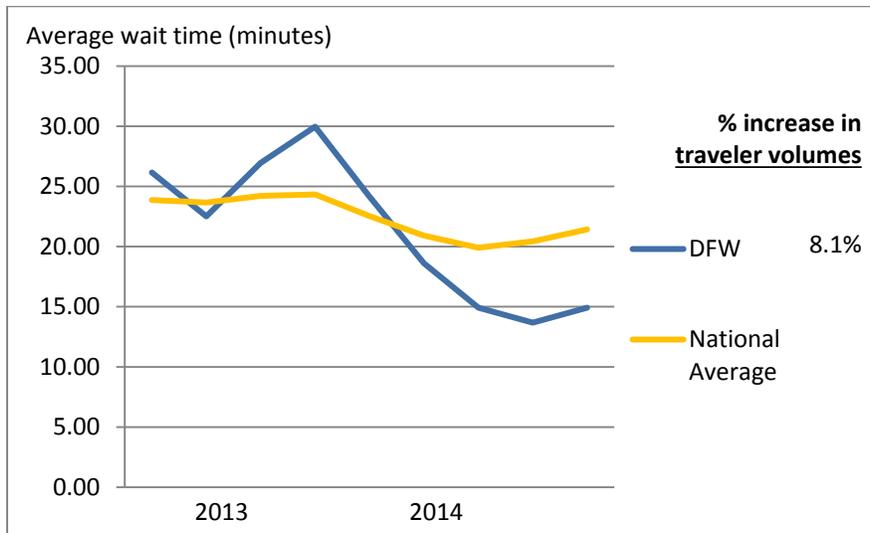
on the U.S. economy.² Adding a single CBP officer at each of the 33 studied border crossings (including land borders and freight) equated to annual benefits of a \$2 million increase in Gross Domestic Product, \$640,000 saved in opportunity costs, and 33 jobs added to the economy per officer added.

Importance of the Arrivals Process

Given the growth in the volume of international air passengers arriving in the United States, ensuring a positive customer experience for travelers is an increasing challenge, but more important than ever. The United States Government understands that travel and tourism is a crucial engine of economic growth and recognizes the potential that this industry has to create jobs and stimulate our economy. Since the global economic downturn in 2009, visitor volume has increased by 16.5 percent, representing an increase of 15 million annual international travelers.

This increase is good news as these travelers are critical to the U.S. economy, spending \$3,080 per visit or more than \$215 billion a year—supporting 1.1 million U.S. jobs. Our success in keeping up with significant growth in travel has required an unprecedented level of cooperation seen not only across federal, state, and local government, but also with the private sector.

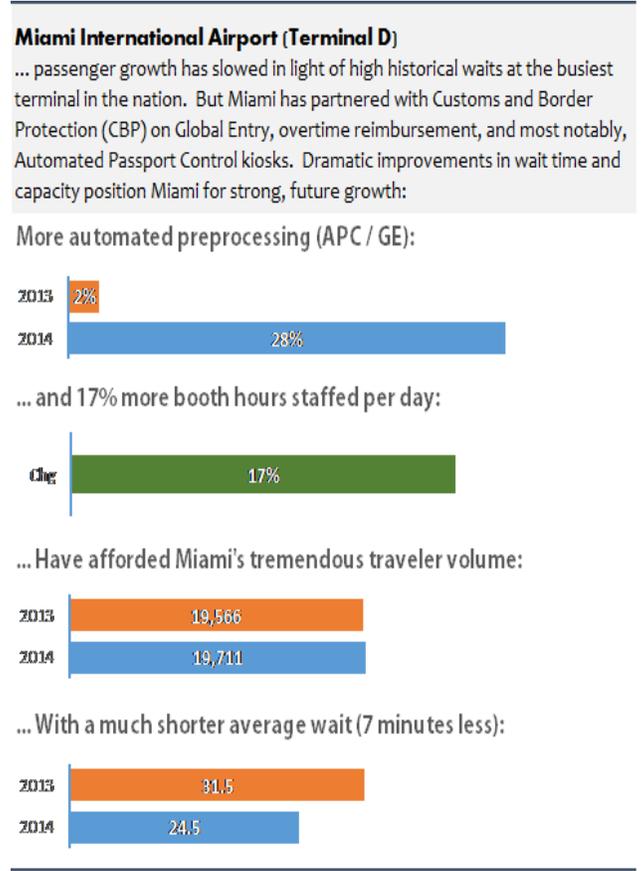
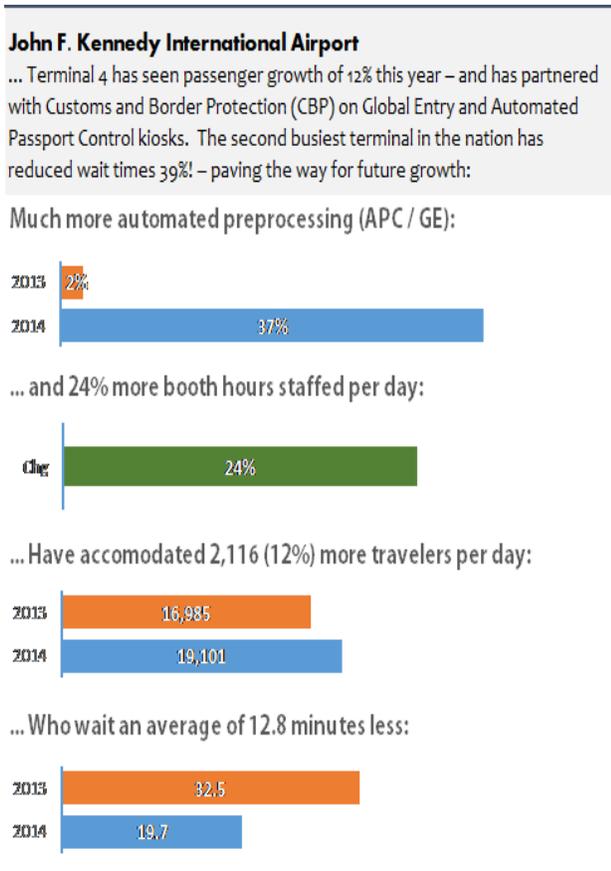
Work with Dallas Fort Worth over the last 18 months shows opportunity to improve the entry process



To address the tremendous increases in travel, while securing our borders and international aviation, CBP, the unified border security agency of the United States, has pursued an aggressive strategy to optimize the international arrivals process and speed travelers to their destinations in the U.S.

² “The Impact on the U.S. Economy of Changes in Wait Times at Ports of Entry,” March 2013, The National Center for Risk and Economic Analysis of Terrorism Events (CREATE)

Under this strategy, CBP is revolutionizing operational processes through automation, innovation, and trusted traveler programs; employing a rigorous approach to identify the staffing needed to effectively carry out CBP’s increasingly complex mission at our Nation’s ports of entry; and utilizing public-private partnerships to support growing passenger volume, expanded services, and facility growth. These include the reimbursable agreements we are piloting with airports such as Houston, Dallas-Fort Worth, Miami, and others as well as facility provisions for ports of entry. Results of this strategy are apparent in the examples illustrated below:



First impressions really matter, and when overseas travelers arrive at our airports, it is important that they have a positive experience. The safety and security of this country will always come first, but we can and must also ensure that the travel experience continues to be welcoming, friendly, and efficient. Toward that end, CBP’s Traveler Satisfaction Survey conducted in 2012 revealed that 94% or more of travelers agree that CBP officers are professional, helpful, efficient, and easy to understand.

During this period of significant increases in volume, wait times of more than one hour rose from 9.8 percent to 18.4 percent as reported by international travelers through DOC’s Survey of International Air Travelers (SIAT). However, the mean rating of satisfaction with processing

time through passport control increased from 68 percent to 70 percent between 2009 and 2013, indicating that other factors besides wait times affect visitors' perception of satisfaction. Similarly, despite rising wait times and numbers of travelers, customer satisfaction with CBP staff courtesy during primary inspection remained largely constant, rising from a mean of 70 percent to 74 percent. Courtesy ratings for CBP staff at baggage inspection increased from a mean of 72 percent to 74 percent.

Experts agree that improving the customer service experience requires an overall commitment to excellence. This commitment can only be realized through a process that includes identifying the key drivers of customer satisfaction, tracking them, and ensuring accountability for maintaining high standards and process improvement.

Current surveys provide some evidence to suggest that we are in range of industry benchmarks for a positive customer experience. According to the American Customer Satisfaction Index, customer satisfaction benchmarks for the travel industry range from the 70 percent to 80 percent range. SIAT responses by international visitors to the United States on questions related to the efficiency of the process and courtesy of staff fall between 65 percent and 70 percent. In addition, data from CBP's Traveler Satisfaction Survey indicates that in the busy summer months of 2012, 84 percent of travelers, including international and U.S. citizens indicate that they felt welcomed on entry to the United States.

Detailed Airport Operational Action Plans

The latest *Action Plans* developed between CBP and local airport authorities, including milestones completed since initial development, are available at www.cbp.gov/traveltourismplans.