

U.S. International Travel and Transportation Trends



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Introduction

Today, security is one of the most important issues in U.S. international passenger travel and transportation. The terrorist attacks of September 11, 2001, had an immediate impact on international travel and transportation, and are expected to continue to influence not only the aviation industry but all passenger travel to and from the United States. Following the attacks, for example, overseas travel to the United States declined by 39 percent in October 2001 compared with October 2000, and overseas travel from the United States fell 29 percent¹(USDOC ITA 2002a, 2002b, 2002c). International air enplanements and border crossings also fell significantly in September and October 2001. Not surprisingly, however, international travel is slowly returning to its pre-September 11 levels as traveler confidence is restored.

Prior to the attacks, international passenger travel to and from the United States showed steady growth in most markets, for an average annual increase of 2 percent between 1990 and 2000. During this period, overall U.S. outbound passenger travel rose from 131 million trips to 171 million, a 31 percent increase. At the same time, overall inbound passenger travel to the United States grew by 6 percent from 184 million trips to 195 million (table 1). International travel continues to hold a large share of U.S. economic activity and tourism.

Although U.S. international passenger travel has seen dramatic changes in recent years, there have also been patterns of continuity. Same-day travel with Canada and Mexico accounts for the majority of U.S. international travel and saw slow but steady growth during the 1990s. Overnight travel to and from other countries grew notably during this same period from 84 million trips to 112 million, a 33 percent increase² (table 2).

Because of the terrorist attacks, new security procedures and concerns are already placing increased demands on the nation's transportation network and posing new challenges for

¹ At the time this report was written, comprehensive data were not available to illustrate the impact of the September 11 attacks on all U.S. international travel, both same-day and overnight for North America and overseas, and for all modes of transportation. Where available, post-September 2001 data are used to assess the impact of September 11 on U.S. international passenger travel.

² *Overnight travel* includes overseas and North American travel of more than one day. In 2000, overseas overnight trips totaled 53 million and North American overnight trips totaled 59 million.

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Table 1
Travel Between the United States and Foreign Countries: 1990, 1995, and 2000
 (Thousands of trips)

	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
TOTAL TRIPS	315,173	314,188	366,251	16.2	1.5
Outbound travel from the United States	131,145	138,670	171,152	30.5	2.7
Inbound travel to the United States	184,028	175,518	195,099	6.0	0.6
NORTH AMERICA¹	284,124	274,490	313,423	10.3	1.0
Overnight ²	52,939	54,456	58,881	11.2	1.1
U.S. residents to Canada	12,252	13,005	15,114	23.4	2.1
U.S. residents to Mexico	16,381	18,771	18,849	15.1	1.4
Canadian residents to the United States	17,263	14,662	14,594	-15.5	-1.7
Mexican residents to the United States	7,041	8,016	10,322	46.6	3.9
Same-day	231,185	220,034	254,542	10.1	1.0
U.S. residents to Canada	22,482	24,325	28,769	28.0	2.5
U.S. residents to Mexico	64,038	63,508	81,565	27.4	2.4
Canadian residents to the United States	53,171	37,491	28,019	-47.3	-6.2
Mexican residents to the United States	91,494	94,710	116,189	27.0	2.4
North America share of total (percent)	90.1	87.4	85.6		
OVERSEAS OVERNIGHT TRAVEL³	31,049	39,698	52,828	70.1	5.5
Outbound travel from the United States	15,990	19,059	26,853	67.9	5.3
Inbound travel to the United States	15,059	20,639	25,975	72.5	5.6
OVERSEAS OVERNIGHT TRAVEL BY REGION³ (bidirectional)					
Europe	14,702	17,389	24,970	69.8	5.4
Western Europe	14,439	16,706	24,091	66.8	5.3
Eastern Europe	503	1,158	1,228	144.3	9.3
Asia	6,902	10,180	12,468	80.7	6.1
Caribbean	4,367	4,665	5,198	19.0	1.8
South America	2,239	4,069	5,036	125.0	8.4
Middle East	893	1,464	2,072	132.0	8.8
Oceania ⁴	1,238	1,179	1,778	43.7	3.7
Central America	1,020	1,271	1,708	67.4	5.3
Africa	425	605	778	83.1	6.2

¹ North American data in this table are different from and should not be compared with the border-crossing data in table 7. See also box 1 on page 4.

² U.S.-Canada and U.S.-Mexico overnight travel data presented in this table are from the U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries. They reflect overall totals for inbound and outbound overnight travel with Canada and Mexico. Table 5 in this report also presents overall totals, but with mode of transportation details. Data for table 5 are from Canadian and Mexican government agencies. These agencies make adjustments and revisions to their data at the modal level. Because of this, the overall overnight travel totals in table 5 will differ from those in this table. Throughout this report, U.S. Department of Commerce data are used for overall overnight travel totals, while Canadian and Mexican sources are used for mode of transportation and trip purpose analysis.

³ The aggregate figures for overseas trips differ from the sum of trips to or from individual regions, because a single outbound trip by a U.S. resident is counted once as an "overseas" trip but could be attributed to multiple regions.

⁴ Oceania includes Australia and New Zealand.

SOURCES: **Overnight**—U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, "Arrivals to the U.S. 1990–2000," and "U.S. Resident Travel Abroad: Historical Visitation—Outbound 1990–2000 (One or More Nights)," available at <http://tinet.ita.doc.gov>, as of July 1, 2001.

Same-day—Statistics Canada, *International Travel: Travel Between Canada and Other Countries (Touriscope)*, Catalogue No. 66-201-XPB (Ottawa, Ontario: Various years).

Banco de México, Dirección General de Investigación Económica, Dirección de Medición Económica, 1999 and 2001.

Table 2
**Overnight Travel Between the United States, Canada,
 Mexico, and Overseas: 1990, 1995, and 2000**
 (Millions of trips)

	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
Total trips	84	94	112	33.0	2.9
North America	53	54	59	11.2	1.1
Canada	30	28	30	0.7	0.1
Mexico	23	27	29	24.5	2.2
Overseas	31	40	53	70.1	5.5
Inbound to the United States	39	43	51	29.3	2.6
North America	24	23	25	2.5	0.2
Canada	17	15	15	–15.5	–1.7
Mexico	7	8	10	46.6	3.9
Overseas	15	21	26	72.5	5.6
Outbound from the United States	45	51	61	36.3	3.1
North America	29	32	34	18.6	1.7
Canada	12	13	15	23.4	2.1
Mexico	16	19	19	15.1	1.4
Overseas	16	19	27	67.9	5.3

NOTE: The International Trade Administration counts inbound overnight arrivals using Immigration and Naturalization Service I-94 data and includes only arrivals of each tourist visitor to the United States. A tourist visitor is defined as a "person traveling to the United States for one or more nights for a period not exceeding twelve months and who is traveling for pleasure, business or study."

SOURCE: U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, "Arrivals to the U.S. 1990–2000," and "U.S. Resident Travel Abroad: Historical Visitation—Outbound 1990–2000 (One or More Nights)," available at <http://tinet.ita.doc.gov>, as of July 1, 2001.

the transportation sector. In particular, the key gateways—airports and land border crossings—that primarily service these travel flows continue to be affected. Like other transportation demands, any changes in international travel will also affect the U.S. transportation network in terms of safety, capacity, scheduling, and congestion.

This report examines transportation's role in facilitating international travel and the demands such travel places on the U.S. transportation system. It provides an overview of U.S. international travel, reviews regional trends, and highlights significant changes in air travel. It also looks at some of the new challenges facing the international transportation community in general, and the aviation industry in particular, following the September 11 terrorist attacks. Although it is still too early to fully assess the long-term effects of these attacks, passenger mobility and international travel could be affected on several levels, including changes in travel volumes, continued adjustments

in security and safety procedures, carrier modifications in scheduling and pricing, and shifts in geographic patterns of travel. This report uses a variety of data sources to show longer term trends in U.S. international passenger travel from 1990 to 2000, and where available employs recent data to assess the immediate impact of the events of September 11 on U.S. international passenger travel.

Overview of U.S. International Travel

U.S. international passenger travel experienced a notable expansion from 1990 to 2000 (table 1 and box 1). In total, 366 million inbound and outbound trips were made between the

Box 1

International Travel Data

Multiple data sources must be used to track U.S. international travel and transportation trends. These data may be collected for administrative/regulatory purposes, from air carriers, or through travel surveys. Each provides important information for analyzing U.S. international travel, but no one source is comprehensive. The United States does not conduct an international travel survey for all modes of transportation for both same-day and overnight travel. Both kinds of information are needed to evaluate the impact of these flows on U.S. transportation systems and services. These different data sources use different definitions, time series, and methodologies, which complicate analysis.

Administrative/Regulatory Data

Immigration Data. As part of the immigration documentation process for entry into the United States, the Immigration and Naturalization Service (INS) requires non-U.S. residents entering the country to complete INS form I-94. Residents of some countries, such as Canada, are exempt from filing the I-94 if they stayed in the United States for less than a certain period or within a specific geographic area. To accommodate this gap, the International Trade Administration (ITA) supplements the INS I-94 data with other sources for those countries. Information on returning U.S. residents is collected through INS form I-92. Information collected from both these forms provide data on the travel volumes of foreign residents from specific countries to the United States as well as the destination countries visited by U.S. residents.

U.S. Customs Data. The U.S. Customs Service collects daily count data of all persons and vehicles entering

the United States along the northern and southern borders. These data do not provide travel and trip characteristics. Nor do they identify travelers by nationality, and as such cannot be used to determine how many persons entering the United States are U.S., Canadian, and Mexican residents or residents of other countries. However, the Customs data show the level of entries at particular border-crossing points.

Travel Surveys

Survey of International Air Travelers. To supplement the travel volume figures from the immigration data, the ITA Office of Tourism Industries conducts a Survey of International Air Travelers that provides information on travel and trip characteristics for overnight trips by air.

U.S.-Canada and U.S.-Mexico Data. Travel volumes and trip characteristics for same-day travel between the United States and Canada and the United States and Mexico (other than the Customs and INS data mentioned above) are based on travel surveys conducted by Canadian and Mexican government agencies. No comparable data are available from U.S. sources. Overnight travel data between the United States and its North American partners are also available from Canadian and Mexican agencies as is some limited information from the ITA Tourism Industries Office.

For U.S.-Canada travel, data are collected through Statistics Canada's Tourism Statistical Program. The data are based on administrative counts, as well as

(Box 1 continued on next page)

(Box 1 continued)

an international travel survey. The administrative count data track crossings and arrivals, modal characteristics, and nationality characteristics at all Canadian ports of entry on a census basis (except for sampling done at seven land ports to estimate automobile and motorcycle flows). Statistics Canada obtains a more detailed international traveler dataset including trip duration, trip purpose, and trip-taker personal characteristics through the Canadian Customs distribution of questionnaire surveys to travel parties according to a pre-arranged schedule and subsequent enhancement by sampling.

For U.S.-Mexico travel, the Banco de México uses sample survey methods at specific international airports and border cities to collect total visitor data, as well as statistics for trip duration, income level, trip purpose, transportation modes used, points of departure, and major cities visited.

While Canadian and Mexican sources are used in this report to highlight modal breakdowns for overnight and same-day U.S.-North American travel, the Bureau of Transportation Statistics' (BTS) American Travel Survey (ATS) also reports characteristics of

U.S. travel abroad. The ATS, last completed in 1995, provides data for long-distance trips of more than 100 miles, including trips made by U.S. residents to Canada and Mexico. This stricter definition of visitors yields a lower number of American trips to Canada and Mexico as compared with the Mexican and Canadian source data and assigns a higher proportion of trips to air travel. For 2002, BTS and the Federal Highway Administration are jointly conducting the National Household Travel Survey, covering both long- and short-distance travel.

Air Carrier Data

BTS's Office of Airline Information collects air carrier data on international travel and transportation. These include the T-100 segment data collected from nearly 90 U.S. commercial air carriers and cover all scheduled and unscheduled international nonstop commercial traffic arriving and departing U.S. airports for aircrafts of 60 seats or more. Approximately 140 foreign carriers serving or transiting the United States file information similar to that supplied by the U.S. carriers, which is included in the T-100(f) statistics.

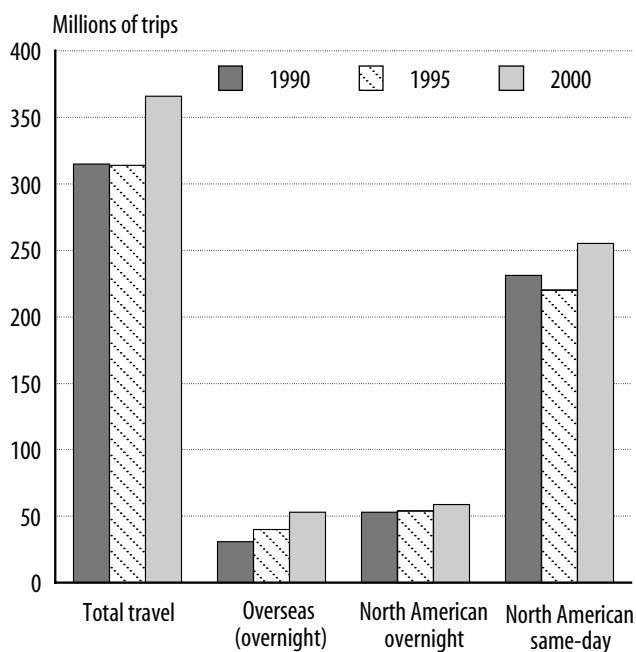
United States and other countries in 2000, a 16 percent increase from 315 million trips in 1990.³ Of trips made in 2000, the majority of U.S. international travel (approximately 86 percent) was with Canada and Mexico, and most of this was same-day travel (figure 1). While North American travel dominates U.S. international travel overall, it grew at a slower annual rate than U.S. travel with overseas countries in the 1990s. Between 1990 and 2000, trips generated in North America rose 10 percent, in contrast to a 70 percent increase for trips between the United States and overseas countries.

The number of U.S. residents traveling to overseas destinations is slightly greater than the number of overseas visitors coming to the United States. In 2000, 27 million U.S. residents traveled to overseas destinations, while 26 million overseas residents⁴ came to the United States. Overall, inbound travel to the United States, including both overseas and North American,

³ Total trips include overnight trips (or those of a duration of one night or more) and same-day trips (which include an arrival and departure on the same day). The U.S. Department of Commerce, International Trade Administration provides overnight data based on immigration documents required by the Immigration and Naturalization Service. Same-day data are from Canadian and Mexican statistical agencies based on immigration documents and travel surveys.

⁴ This number includes Canada and Mexico and is based on overnight visits only.

Figure 1
**Overall U.S. International
 Travel: 1990, 1995, and 2000**
 (Bidirectional)



SOURCES: **Overnight**— U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, "Arrivals to the U.S. 1990–2000," and "U.S. Resident Travel Abroad: Historical Visitation—Outbound 1990–2000 (One or More Nights)," available at <http://tinnet.ita.doc.gov>, as of July 1, 2001.

Same-day—Statistics Canada, *International Travel: Travel Between Canada and Other Countries (Touriscope)*, Catalogue No. 66-201-XPB (Ottawa, Ontario: Various years). Banco de México, Dirección General de Investigación Económica, Dirección de Medición Económica, 1999 and 2001.

increased more slowly than outbound U.S. travel. Still, the United States, with 51 million foreign resident visits, surpassed Spain to become the second-most visited country worldwide. In comparison, France accounted for the most international overnight visits, with 76 million in 2000 (USDOC ITA 2001d). Europe still remains the top origin and destination for U.S. inbound and outbound overseas travel, followed by Asia, the Caribbean, and South America (figure 2). However, U.S. travel grew fastest with Eastern Europe, the Middle East, and South America, during the last decade (table 1). Regions such as Africa, Central America, and Oceania (Australia and New Zealand) also experienced notable increases in travel with the United States.

Although U.S. international travel increased between 1990 and 2000, travel began to slow in early 2001 and more significant declines occurred following September 11, 2001. Overnight trips between the United States and overseas countries from January through August 2001

were slightly lower than comparable numbers for 2000. The September and October drops in overseas overnight travel were more drastic, falling by 32 and 34 percent, respectively, from 2000 levels.

Despite these recent declines, international passenger travel generates much revenue for transportation carriers, hotels, restaurants, and other travel-related businesses. The United States had a 7 percent share of all international overnight visitors in 2000 and a 17 percent share of worldwide international overnight visitor receipts (USDOC ITA 2001c). Travel expenditures by international

visitors in the United States amounted to \$82 billion in 2000, nearly \$18 billion more than U.S. residents spent on international trips⁵ (table 3). Passenger fares paid by international travelers to U.S. transportation providers brought in another \$21 billion, but this was \$3 billion less than what U.S. residents paid to transportation service providers in other countries.⁶ Although U.S. residents travel most frequently to Canada and Mexico, they spent the most in terms of their travel costs and passenger fares for visits to the United Kingdom (table 3 and figure 3). In 2000, residents of Japan and the United Kingdom spent more than other international travelers to the United States, followed by Canada and Mexico.

Japanese visitors' expenditures are largely responsible for the U.S. travel and passenger fare expenditures surplus. In 2000, the Japanese spent over \$10 billion more in the United States on travel and passenger fares than did U.S. residents traveling in Japan. Meanwhile, the United States ran a travel and passenger fare deficit of approximately \$1.6 billion with Mexico in 2000. U.S. residents spend much greater sums of money on their trips to Mexico than Mexicans do in the United States, as expenditures on passenger fares alone show a relatively small balance (USDOD BEA 2001, tables 1 and 10).

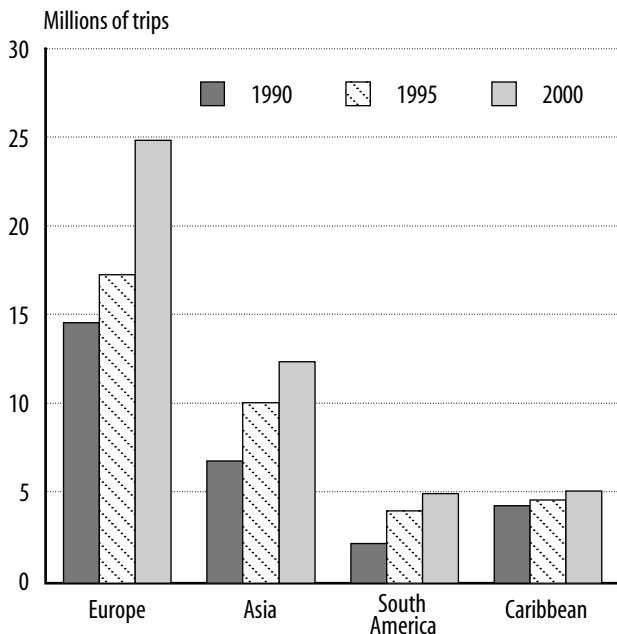
North American Travel Trends

The majority of U.S. international travel is with Canada and Mexico. It has been characterized by fluctuations during the

⁵ *Travel expenditures* include goods and services (e.g., food, lodging, recreation, gifts, entertainment, and local transportation) purchased when visiting a foreign country. A *traveler* is a person who visits a country for less than one year, except diplomats and military and civilian government personnel. Educational and medical expenditures are not included. Expenditures on same-day trips by U.S., Canadian, and Mexican residents are included.

⁶ *International passenger fares* are fares paid by residents of one country to airline and vessel operators in another country on trips to or from the two countries involved.

Figure 2
U.S. International Overseas Overnight Travel
by Region: 1990, 1995, and 2000
(Bidirectional)



SOURCE: U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, "Arrivals to the U.S. 1990-2000," and "U.S. Resident Travel Abroad: Historical Visitation—Outbound 1990-2000 (One or More Nights)," available at <http://tinnet.ita.doc.gov>, as of July 1, 2001.

Table 3
U.S. Travel and Passenger Fare Receipts and Payments for the Top 6 Countries: 2000
 (Millions of dollars)

Country	Receipts from foreign residents			Payments by U.S. residents			Balance (receipts minus payments)		
	Total receipts	Travel receipts	Passenger fare receipts	Total payments	Travel payments	Passenger fare payments	Total balance	Travel balance	Passenger fare balance
Japan	14,011	10,238	3,773	3,810	2,872	938	10,201	7,366	2,835
United Kingdom	12,708	9,957	2,751	11,114	6,368	4,746	1,594	3,589	-1,995
Canada	8,768	7,055	1,713	7,194	6,367	827	1,574	688	886
Mexico	5,964	4,937	1,027	7,566	6,646	920	-1,602	-1,709	107
Germany	5,125	4,035	1,090	4,602	2,678	1,924	523	1,357	-834
France	3,653	2,637	1,016	4,817	3,634	1,183	-1,164	-997	-167
Total, top 6 countries	50,229	38,859	11,370	39,148	28,565	10,583	11,126	10,294	832
Total, all countries	102,787	82,042	20,745	88,734	64,537	24,197	14,053	17,505	-3,452

NOTES: Countries are ranked by total receipts.

Travel—The travel accounts cover purchases of goods and services by U.S. citizens traveling abroad and by foreign travelers in the United States for business or personal reasons. These goods and services include food, lodging, recreation, gifts, entertainment, and other items incidental to a foreign visit.

Passenger fares—The passenger fare accounts cover fares paid by residents of one country to airline and vessel operators (carriers) of another country.

Receipts consist of fares received by U.S. air carriers from foreign residents for travel between the United States and foreign countries and between two foreign points and for travel on U.S. cruise vessels.

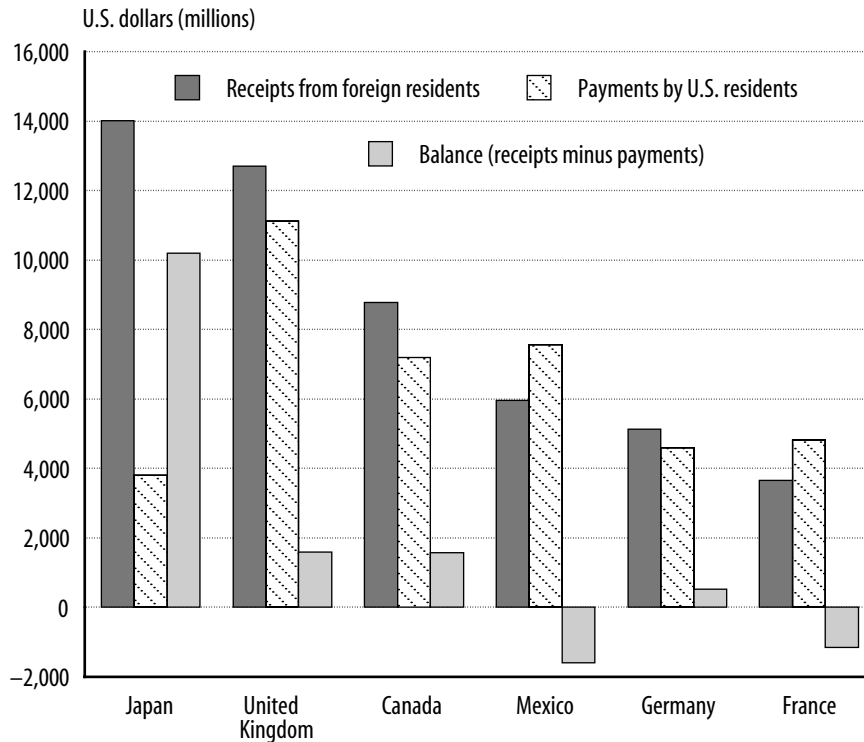
Payments consist of fares paid by U.S. residents to foreign air carriers for travel between the United States and foreign countries and for travel on foreign cruise vessels.

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, July 2001, tables 1 and 10.

1990s, most recently since September 2001. In 2000, approximately 313 million visits, or roundtrips, were recorded between the United States and Mexico and the United States and Canada, an increase of 10 percent from 1990.⁷ Of this travel, U.S.-Mexico activity accounted for 72 percent (227 million trips) and U.S.-Canada travel represented 28 percent (86 million trips). Same-day trips accounted for four-fifths of all travel back and forth across the borders, with the remaining 20 percent involving an

⁷ These data differ from the border-crossing numbers presented later in this section. The 313 million visits represents roundtrips made by residents of Canada, the United States, and Mexico. The data are obtained through a combination of immigration and travel surveys. Such sources provide travel characteristics, including trip duration and purpose. In contrast, border-crossing/entry data are collected at the U.S. ports of entry (land, water, and air). These numbers reflect all entries, not just the residents of the departure country. It is not possible to separate these data by trip duration or country of residency.

Figure 3
U.S. Travel and Passenger Fare Receipts and Payments for the Top 6 Countries: 2000



SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, July 2001, tables 1 and 10.

overnight stay. The vast majority of people cross the border in personal vehicles (tables 4 and 5). Other options for travel across the border are walking, flying, or taking a bus. Relatively few travelers use trains.

North American Same-Day Travel

Same-day excursions dominate travel between the United States and its two neighbors, accounting for about 87 percent of total travel between the United States and Mexico and about 66 percent of total travel between the United States and Canada.

About half of Canadian travelers cited pleasure as the most common reason for same-day travel to the United States in 2000. Another one-third traveled for shopping and other purposes. About 7 percent cited business as their main reason to travel,

Table 4
Same-Day Travel Between the United States, Canada, and Mexico by Mode of Transportation: 1990, 1995, and 2000
 (Thousands of visits)

	1990		1995		2000		Percentage change, 1990–2000
	Number	Percent	Number	Percent	Number	Percent	
SAME-DAY TRAVEL TO THE UNITED STATES							
Canadian residents	53,171	100.0	37,491	100.0	28,019	100.0	–47.3
Air	137	0.3	138	0.4	121	0.4	–11.7
Land							
Motor vehicles	52,629	99.0	37,201	99.2	27,784	99.2	–47.2
Personal vehicles	51,829	97.5	36,414	97.1	27,106	96.7	–47.7
Intercity and charter buses	800	1.5	787	2.1	678	2.4	–15.3
Intercity rail	N	N	N	N	N	N	N
Other ¹	405	0.8	152	0.4	114	0.4	–71.9
Mexican residents	91,494	100.0	94,710	100.0	116,189	100.0	27.0
Air	N	N	N	N	N	N	N
Land	91,494	100.0	94,710	100.0	116,189	100.0	27.0
SAME-DAY TRAVEL FROM THE UNITED STATES							
U.S. residents to Canada	22,482	100.0	24,325	100.0	28,769	100.0	28.0
Air	165	0.7	260	1.1	496	1.7	200.6
Land							
Motor vehicles	21,412	95.2	23,604	97.0	27,719	96.4	29.5
Personal vehicles	20,692	92.0	22,746	93.5	26,646	92.6	28.8
Intercity and charter buses	720	3.2	858	3.5	1,073	3.7	49.0
Intercity rail	N	N	N	N	N	N	N
Other ¹	905	4.0	455	1.9	540	1.9	–40.3
U.S. residents to Mexico	64,038	100.0	63,508	100.0	81,565	100.0	27.4
Air	N	N	N	N	N	N	N
Land	64,038	100.0	63,508	100.0	81,565	100.0	27.4

¹ Includes boaters, pedestrians, and cyclists.

KEY: N = data are nonexistent.

SOURCES: Statistics Canada, *International Travel: Travel Between Canada and Other Countries (Touriscope)*, Catalogue No. 66-201-XPB (Ottawa, Ontario: Various years).

Banco de México, Dirección General de Investigación Económica, Dirección de Medición Económica, 1999 and 2001.

while another 11 percent visited friends and relatives (table 6). Same-day trip purpose shares for U.S. residents traveling to Canada are comparable, with a slightly higher proportion visiting friends and relatives and shopping; fewer traveled for pleasure and business (Statistics Canada 1998, 2000, Various years). Comparable data are not available for Mexico.⁸

⁸ The U.S. government does not conduct surveys on same-day travel to or from the United States, nor does it collect data that include modal detail or travel purpose for all modes of transportation for overnight travel between the United States and Canada. U.S. agencies typically obtain these data from Statistics Canada. However, the Bureau of Transportation Statistics' American Travel Survey provides trip purpose data on U.S. travel to Canada for trips longer than 100 miles (approximately 160 kilometers).

Table 5
**Overnight Travel Between the United States, Canada,
 and Mexico by Mode of Transportation: 1990, 1995, and 2000**
 (Thousands of visits)

	1990		1995		2000		Percentage change, 1990–2000
	Number	Percent	Number	Percent	Number	Percent	
OVERNIGHT TRAVEL TO THE UNITED STATES							
Canadian residents	17,262	100.0	14,663	100.0	14,648	100.0	-15.1
Air	4,039	23.4	3,802	25.9	5,354	36.6	32.6
Land							
Motor vehicles	12,770	74.0	10,338	70.5	8,694	59.4	-31.9
Personal vehicles	12,164	70.5	9,686	66.1	7,966	54.4	-34.5
Intercity and charter buses	606	3.5	652	4.4	728	5.0	20.1
Intercity rail	36	0.2	34	0.2	42	0.3	16.7
Other ¹	416	2.4	489	3.3	558	3.8	34.1
Mexican residents	7,040	100.0	8,189	100.0	10,604	100.0	50.6
Air	959	13.6	796	9.7	1,456	13.7	51.8
Land	6,081	86.4	7,393	90.3	9,148	86.3	50.4
OVERNIGHT TRAVEL FROM THE UNITED STATES							
U.S. residents to Canada	12,252	100.0	13,005	100.0	15,225	100.0	24.3
Air	2,372	19.4	2,769	21.3	3,872	25.4	63.2
Land							
Motor vehicles	9,103	74.3	9,451	72.7	10,256	67.4	12.7
Personal vehicles	8,381	68.4	8,702	66.9	9,458	62.1	12.9
Intercity and charter buses	722	5.9	749	5.8	798	5.2	10.5
Intercity rail	N	N	72	0.6	108	0.7	N
Other ¹	778	6.3	713	5.5	989	6.5	27.1
U.S. residents to Mexico	16,377	100.0	19,221	100.0	19,379	100.0	18.3
Air	3,635	22.2	4,741	24.7	6,710	34.6	84.6
Land	12,742	77.8	14,480	75.3	12,669	65.4	-0.6

¹ Includes boaters, pedestrians, and cyclists.

KEY: N = data are nonexistent.

NOTE: U.S.-Canada and U.S.-Mexico overnight travel data presented in this table are from Canadian and Mexican government agencies. These agencies make adjustments and revisions to their data at the modal level. Because of this, the overall overnight totals in this table will differ from those in table 1.

Table 1 data are from the U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries and are not adjusted at the modal level.

SOURCES: Statistics Canada, *International Travel: Travel Between Canada and Other Countries (Touriscope)*, Catalogue No. 66-201-XPB (Ottawa, Ontario: Various years).
 Banco de México, Dirección General de Investigación Económica, Dirección de Medición Económica, 1999 and 2001.

Same-day travel between Canada and the United States declined dramatically between 1990 and 2000, dropping from 76 million visits to 57 million. Much of the decline is due to fewer Canadians coming to the United States, while the number of American visits to Canada has grown. The most pronounced decline is for pleasure and business trips, although all trip purposes have been affected. The drop in Canadian trips to the United States has partly been the result of unfavorable exchange rates for the Canadian dollar. For specific modes, same-day travel by personal vehicles from Canada to the United States

Table 6
Canada-U.S./U.S.-Canada Travel by Trip Purpose: 1990, 1995, and 2000
 (Thousands of visits)

	1990		1995		2000		Percentage change, 1990–2000
	Number	Percent	Number	Percent	Number	Percent	
CANADIAN RESIDENT TRAVEL TO THE UNITED STATES							
Overnight travel	17,262	100.0	14,663	100.0	14,648	100.0	–15.1
Pleasure/tourism	10,586	61.3	8,316	56.7	7,752	52.9	–26.8
Business	1,972	11.4	2,260	15.4	2,739	18.7	38.9
Visit family and friends	2,701	15.6	2,626	17.9	2,881	19.7	6.7
Other ¹	2,003	11.6	1,462	10.0	1,276	8.7	–36.3
Same-day travel	53,171	100.0	37,491	100.0	28,019	100.0	–47.3
Pleasure/tourism	34,159	64.2	22,394	59.7	14,066	50.2	–58.8
Business	3,567	6.7	2,971	7.9	1,848	6.6	–48.2
Visit family and friends	4,703	8.8	3,473	9.3	2,971	10.6	–36.8
Other ¹	10,741	20.2	8,650	23.1	9,134	32.6	–15.0
U.S. RESIDENT TRAVEL TO CANADA							
Overnight travel	12,252	100.0	13,005	100.0	15,225	100.0	24.3
Pleasure/tourism	7,012	57.2	7,498	57.7	8,534	56.1	21.7
Business	1,729	14.1	1,926	14.8	2,363	15.5	36.7
Visit family and friends	2,602	21.2	2,323	17.9	2,832	18.6	8.8
Other ¹	909	7.4	1,259	9.7	1,496	9.8	64.6
Same-day travel	22,482	100.0	24,325	100.0	28,769	100.0	28.0
Pleasure/tourism	10,958	48.7	11,839	48.7	13,784	47.9	25.8
Business	1,967	8.7	1,792	7.4	1,425	5.0	–27.6
Visit family and friends	5,385	24.0	3,923	16.1	3,781	13.1	–29.8
Other ¹	4,172	18.6	6,771	27.8	9,779	34.0	134.4

¹ Includes personal, in transit, shopping, educational study, and other.

SOURCES: Statistics Canada, *International Travel: Travel Between Canada and Other Countries (Touriscope)*, Catalogue No. 66-201-XPB (Ottawa, Ontario: Various years); and Statistics Canada, special tabulations, 1998.

shows the most decline, while same-day air travel by Americans increased over this period.

In contrast to the U.S.-Canada situation, same-day travel between the United States and Mexico increased markedly (by approximately 27 percent) from 1990 to 2000. Same-day travel in both directions increased at comparable rates. The rate at which same-day travel between the United States and Mexico grew was especially rapid toward the close of the decade.

The vast majority of North American same-day travelers cross the border in personal vehicles. Border-entry data show that 344 million land passenger crossings were made into the United

Table 7

**Border Crossings into the United States from Canada and Mexico:
Passenger and Personal Vehicle Crossings, 1998–2001**

	1998		1999		2000		2001	
	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent
FROM CANADA								
Total, passenger crossings	92,904	100.0	97,610	100.0	95,775	100.0	80,431	100.0
By train	241	0.3	187	0.2	270	0.3	254	0.3
By bus	3,951	4.3	4,366	4.5	4,873	5.1	4,456	5.5
On foot (pedestrian)	585	0.6	587	0.6	585	0.6	750	0.9
By personal vehicle	88,127	94.9	92,470	94.7	90,047	94.0	74,971	93.2
Total, personal vehicle crossings	36,597	100.0	37,220	100.0	36,915	100.0	34,308	100.0
FROM MEXICO								
Total, passenger crossings	274,232	100.0	294,311	100.0	290,368	100.0	263,993	100.0
By train	13	–	17	–	18	–	19	–
By bus	3,639	1.3	3,495	1.2	3,466	1.2	3,367	1.3
On foot (pedestrian)	44,477	16.2	48,186	16.4	47,090	16.2	51,501	19.5
By personal vehicle	226,104	82.4	242,613	82.4	239,795	82.6	209,106	79.2
Total, personal vehicle crossings	83,854	100.0	89,470	100.0	91,157	100.0	89,527	100.0

KEY: – = value too small to report.

NOTE: Data for passenger crossings in personal vehicles include the driver. Personal vehicle crossings include automobiles, minivans, sport utility vehicles, and pickups.

SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, special tabulation, February 2002; based on U.S. Department of Commerce, U.S. Customs Service, Mission Support Services, Office of Field Operations, *Operations Management Database CD*.

States from Mexico and Canada in 2001—approximately 944,000 a day.⁹ These data also show that the number of passenger and personal vehicle crossings into the United States has fluctuated since 1998 (table 7), with steep declines in the later months of 2001 (discussed in detail in the section on Border Issues).

On the U.S.-Mexican border, about 20 percent of those entering the United States from Mexico were on foot, while most of the rest crossed in personal vehicles. In 2001, approximately 245,000 personal vehicles crossed into the United States everyday from Mexico, with El Paso, Texas, and San Ysidro, California, each handling a large share, over 40,000 incoming personal vehicles a day (table 8).

⁹ These data differ from the trip data presented in tables 1, 2, 4, 5, and 6. In contrast, the data presented here represent crossings into the United States, collected by the U.S. Customs Service at all U.S. land, air, and maritime ports. These numbers reflect all entries, and it is not possible to separate these data into entries for same-day and overnight travel or by country of residency for the traveler. Additionally, these border-crossing figures do not reflect the number of unique individuals, but instead indicates the number of border crossings (the same individual may make multiple trips). This is not the case for same-day and overnight travel data, which are always referred to as visits or trips.

Table 8
Top 10 North American Border Ports for Incoming Passenger and Personal Vehicle Crossings: 2001

Rank ¹	U.S. Customs port/crossing	Passengers in personal vehicles (crossings per day)	Personal vehicles (crossings per day)	Daily port share of personal vehicle crossings, U.S.- Mexico and Canada borders (percent)
1	El Paso, TX	107,399	44,208	13.1
2	San Ysidro, CA	90,421	41,100	12.1
3	Detroit, MI	41,526	20,782	6.1
4	Hidalgo, TX	48,530	20,685	6.1
5	Brownsville, TX	46,444	20,681	6.1
6	Laredo, TX	47,349	20,423	6.0
7	Buffalo-Niagara, NY	45,401	20,263	6.0
8	Calexico, CA	41,117	17,464	5.2
9	Nogales, AZ	27,059	12,578	3.7
10	Otay Mesa, CA	23,028	10,841	3.2
	Total, top 10 ports	518,273	229,024	67.7
	Total, North America	778,293	339,274	100.0
	Total, U.S.-Mexico	572,893	245,279	72.3
	Total, U.S.-Canada	205,400	93,995	27.7

¹ Rankings are based on the number of personal vehicle crossings per day.

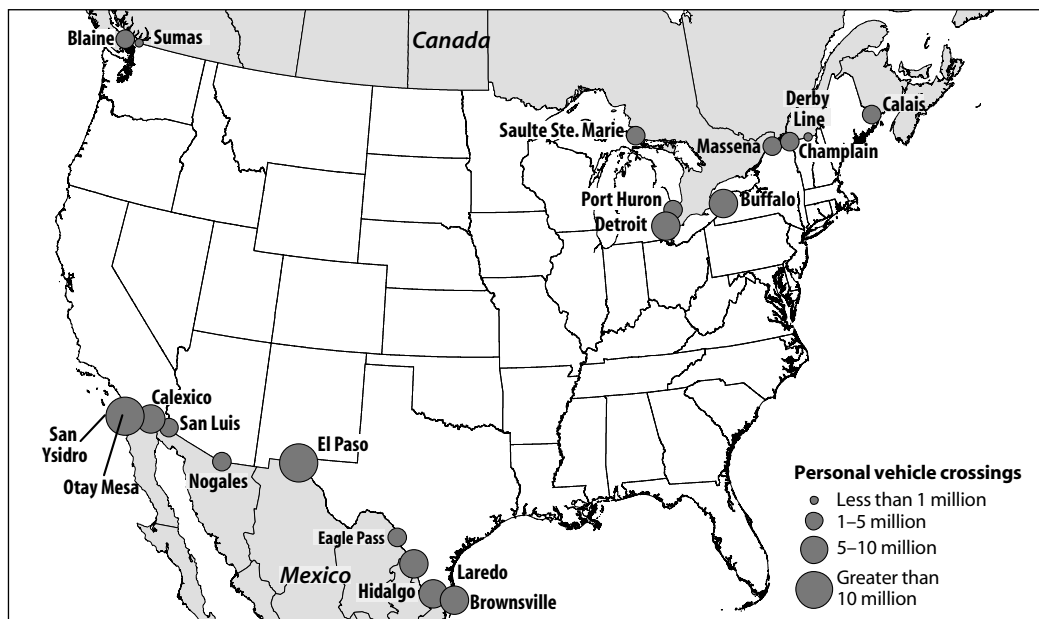
SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, special tabulation, February 2002; based on U.S. Department of Commerce, U.S. Customs Service, Mission Support Services, Office of Field Operations, *Operations Management Database CD*.

Similar border-crossing data show that the number of people coming into the United States from Canada by land is about one-third of those entering from Mexico, about 80 million in 2001, or 220,000 a day on average. Most of these people enter in personal vehicles, approximately 94,000 vehicles a day. Detroit and Buffalo-Niagara handle about 20,000 vehicles a day each, half the amount of the most active crossing points on the Mexican border (figure 4).

North American Overnight Travel

Over half (53 percent) of international overnight travel involving the United States is to and from Canada and Mexico (table 2). In 2000, 51 million international overnight trips were made to the United States, with Canada and Mexico together accounting for just under half the trips (29 percent from Canada and another 20 percent from Mexico). Although appreciable, it is a drop from 1990 when North American trips accounted for 62 percent of all overnight visits to the United States. On the outbound side, U.S.

Figure 4
Top Border Ports for Personal Vehicle Crossings from Canada and Mexico: 2001



SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, special tabulation, February 2002; based on U.S. Department of Commerce, U.S. Customs Service, Mission Support Services, Office of Field Operations, *Operations Management Database CD*.

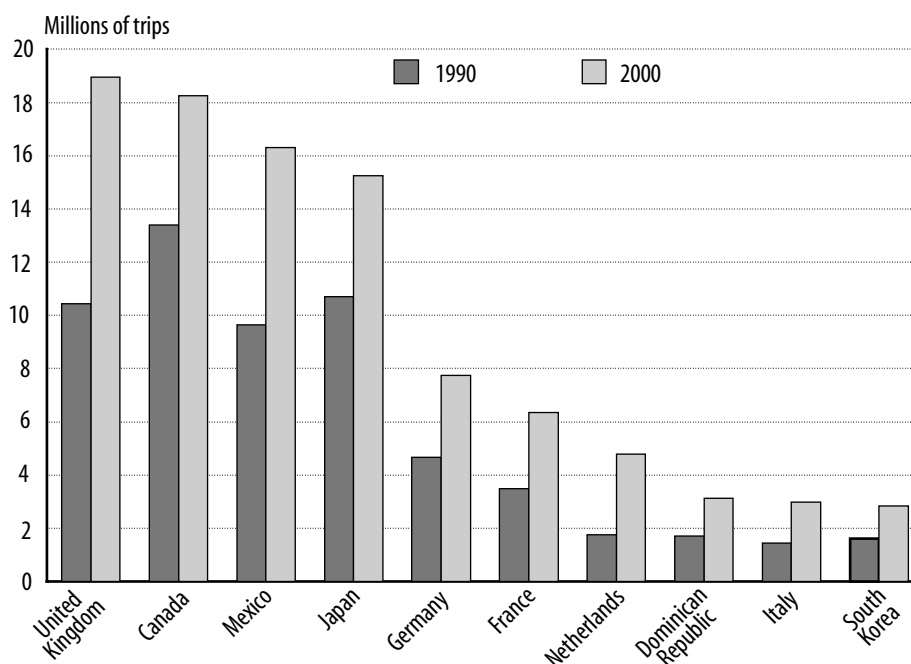
residents made 61 million overnight trips in 2000 with Mexico their top destination (accounting for one-third of these trips), followed by Canada (accounting for one-quarter). Canada and Mexico have remained the top destinations for U.S. resident overnight travel for at least the past decade.

As with same-day travel, ground transportation, particularly the use of personal vehicles, is still the primary mode for North American overnight travel. About 64 percent of overnight visits between the United States and Canada were made by land modes (mainly personal vehicles) in 2000, down from 74 percent in 1990. As for overnight travel between the United States and Mexico in 2000, approximately 73 percent of these trips were made by land modes, down from around 80 percent in 1990.

Air is increasingly relied on for North American overnight travel. Table 5 (page 11) shows air travel's growing modal share of international North American trips from 1990 to 2000, with the exception of Mexican travel to the United States, where air's modal share remained relatively stable during this time period.

During the 1990s, air trips grew from 22 percent to about 31 percent of overnight trips between the United States and Canada, and from 20 percent to 27 percent for such trips between the United States and Mexico between 1990 and 2000 (Statistics Canada Various years; Banco de México 1999 and 2001). Notably in 2000, the U.S.-Canada market was the world's second largest nonstop bilateral air passenger market behind the U.S.-United Kingdom, while the U.S.-Mexico market ranked third¹⁰ (figure 5). The top three North American international air passenger city pairs were Toronto-New York, Toronto-Chicago, and Los Angeles-Mexico City (USDOT BTS OAI 2001b).

Figure 5
Top 10 Countries for Total Nonstop Bidirectional Air Travel with the United States: 1990 and 2000



SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, T-100 Segment data, 2001.

Notwithstanding the relatively strong growth in North American overnight air travel during the 1990s, modest declines began to occur between January and August 2001. These downturns grew notably following September 11. Trips made

¹⁰ In 1994, there were 54 nonstop markets with annual traffic of more than 50,000 passengers. In 1997, the number of markets with that level of traffic rose to 77, an increase of 42.6 percent (USDOT OST 1998).

between the United States and Canada and Mexico declined by 24 percent in September and 23 percent in October 2001, compared with the same months in 2000, with a greater decline seen in the U.S.-Mexican market than in the U.S.-Canadian market. Overnight trips by air between Canada and the United States declined by 21 percent and 22 percent in September and October 2001, respectively, compared with the same months in 2000 and compared with 33 percent and 27 percent decreases during the same months for U.S.-Mexico overnight air travel (USDOT ITA 2002a, 2002b, 2002c).

Overnight trip purposes for U.S.-Canada travel are generally similar to same-day travel, but with a higher share of business-related trips and lower shares for shopping and personal trips. In 2000, over 50 percent of Canadian overnight visits to the United States were for pleasure and tourism, almost 20 percent were for visits to friends and family, and nearly 19 percent were for business. Roughly similar ratios were seen for U.S. overnight travel to Canada (table 6). Comparable trip purpose data for Mexican overnight visits to the United States are unavailable.

Border Issues

Since September 11, 2001, security at U.S. borders has been heightened, focusing on threat deterrence and preventing would-be terrorists from gaining entry into the United States. Government agencies charged with protecting U.S. borders have also tightened their inspections and security procedures.¹¹ An anti-terrorism law, the USA Patriot Act (Public Law 107-56, sec. 401), signed into law by President George W. Bush on October 26, 2001, authorized a tripling of U.S. agents along the Canadian border. Border enforcement will also increase on the Mexican border. In addition, the Border Security and Visa Entry Reform Act (Public Law 107-173), signed into law on May 14, 2002, had several provisions dealing with enhanced border security, including increases in the number of immigration inspectors and investigators who will be deployed along both U.S. land borders and other ports of entry.

¹¹ The agencies primarily responsible for border control and immigration are: 1) the Immigration and Naturalization Service, responsible for checking travelers' documents at legal points of entry; 2) the U.S. Customs Service, which checks cargo, vehicles, and passenger baggage at all ports of entry; 3) the U.S. Coast Guard, which polices seaports, coastlines, and waterways; and 4) the newly created Transportation Security Administration, which monitors and is in charge of security for all modes of transportation.

Table 9
Top Border Ports for Personal Vehicle Crossings from Mexico and Canada: Monthly Data for 2000 and 2001
 (Thousands of crossings, ranked by annual crossings in 2001)

Border port	August			September			October			November			December		
	2000	2001	Change (%)	2000	2001	Change (%)	2000	2001	Change (%)	2000	2001	Change (%)	2000	2001	Change (%)
U.S.-MEXICO BORDER															
El Paso, TX	1,480	1,696	14.6	1,427	1,074	-24.7	1,397	982	-29.7	1,249	1,019	-18.4	1,326	1,185	-10.6
San Ysidro, CA	1,315	1,501	14.1	1,197	1,023	-14.6	1,309	1,006	-23.2	1,368	942	-31.1	1,356	1,047	-22.8
Hidalgo, TX	703	526	-25.1	658	563	-14.4	661	555	-16.0	645	573	-11.0	700	666	-4.9
Brownsville, TX	641	688	7.4	632	507	-19.8	633	526	-16.8	648	537	-17.2	704	590	-16.1
Laredo, TX	611	732	19.8	615	496	-19.4	595	509	-14.3	599	524	-12.4	642	571	-11.0
Calexico, CA	544	547	0.4	548	404	-26.4	580	425	-26.8	551	443	-19.6	548	533	-2.6
Nogales, AZ	401	421	4.9	383	321	-16.0	395	284	-28.1	408	352	-13.7	422	348	-17.7
Otay Mesa, CA	432	364	-15.6	427	270	-36.7	408	274	-32.9	242	272	12.2	272	330	21.4
Eagle Pass, TX	275	290	5.6	269	237	-11.9	277	245	-11.5	376	302	-19.9	353	321	-9.2
Calexico East, CA	210	254	20.7	237	223	-5.9	254	229	-9.9	279	271	-2.7	321	315	-1.8
Total, top 10 ports	6,611	7,018	6.2	6,393	5,117	-19.9	6,509	5,035	-22.6	6,364	5,234	-17.7	6,643	5,906	-11.1
Total, all U.S.-Mexico ports	7,786	8,268	6.2	7,564	6,141	-18.8	7,701	6,013	-21.9	7,560	6,330	-16.3	7,940	7,243	-8.8
U.S.-CANADA BORDER															
Detroit, MI	782	781	-0.1	707	469	-33.6	721	435	-39.7	667	478	-28.3	602	513	-14.8
Buffalo-Niagara, NY	954	973	2.0	722	547	-24.2	663	513	-22.6	527	490	-7.0	491	410	-16.6
Blaine, WA	355	358	0.7	312	191	-38.9	271	146	-45.9	249	164	-34.2	242	185	-23.4
Port Huron, MI	264	266	0.6	215	162	-24.7	206	145	-29.8	179	147	-17.8	152	147	-2.9
Calais, ME	154	153	-0.5	127	120	-5.5	120	46	-62.2	108	67	-38.2	109	72	-34.2
Massena, NY	101	114	13.6	95	86	-9.9	93	83	-10.6	86	84	-2.3	83	86	3.6
Sault Ste. Marie, MI	134	131	-2.6	121	90	-25.4	106	75	-28.9	85	72	-14.9	85	75	-12.3
Champlain-Rouses Pt., NY	128	146	14.1	91	93	2.3	82	70	-13.9	66	64	-4.1	59	64	8.8
Point Roberts, WA	94	89	-5.3	76	54	-29.4	83	44	-46.3	56	42	-25.5	54	45	-16.5
Sumas, WA	95	92	-3.6	78	62	-20.7	69	52	-24.7	55	42	-23.7	54	44	-17.8
Total, top 10 ports	3,061	3,103	1.4	2,544	1,874	-26.3	2,413	1,609	-33.3	2,078	1,649	-20.6	1,930	1,641	-15.0
Total, all U.S.-Canada ports	4,094	4,150	1.4	3,375	2,572	-23.8	3,140	2,223	-29.2	2,679	2,180	-18.6	2,493	2,172	-12.8
Total U.S.-Mexico and U.S.-Canada	11,880	12,418	4.5	10,940	8,714	-20.3	10,840	8,236	-24.0	10,239	8,511	-16.9	10,433	9,416	-9.7

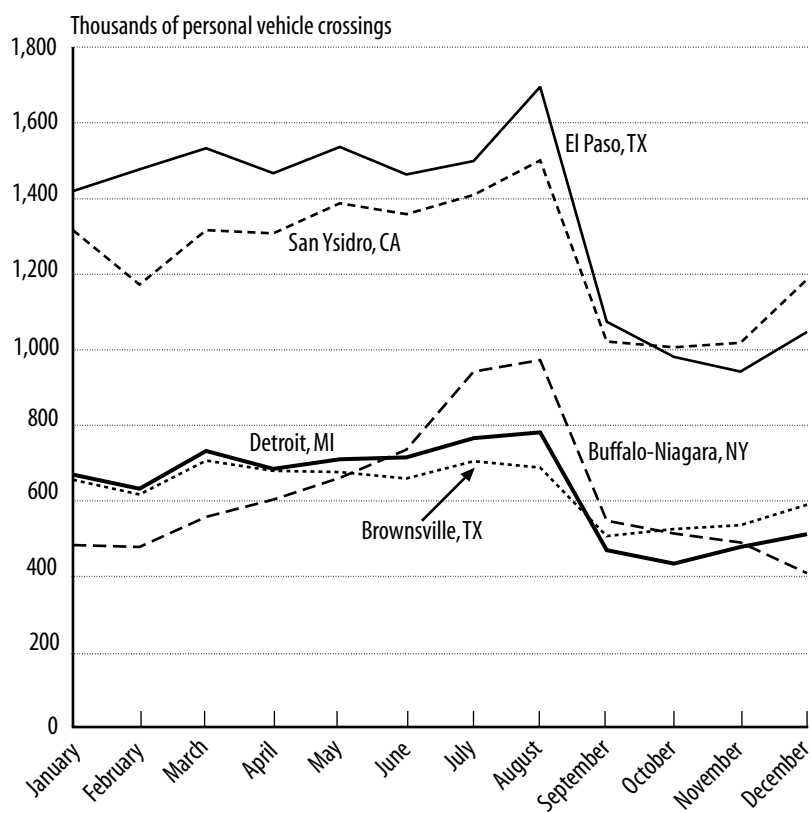
SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, special tabulation, February 2002; based on U.S. Department of Commerce, U.S. Customs Service, Mission Support Services, Office of Field Operations, *Operations Management Database CD*.

Heightened border security was accompanied by declines in entries from Canada and Mexico in the months immediately following September 11, followed by less severe declines in late 2001. Table 9 compares the number of personal vehicle cross-

ings at the top 10 land ports for each border for August through December, in both 2000 and 2001. In September 2001, the number of personal vehicles entering the United States from Canada and Mexico was 20 percent less than in September 2000. The decline continued in October 2001 with a decrease of 24 percent over 2000 levels. However, in November and December 2001, the declines were 17 percent and 10 percent, respectively, compared with 2000. At some of the busiest ports, the decrease was even greater. For example, El Paso reported a reduction of about 25 percent in September 2001 and 30 percent in October 2001, when compared with 2000 figures for those same months. On the northern border, Detroit and Blaine, Washington, experienced even greater reductions. In September 2001, the number of personal vehicle crossings dropped 34 percent in Detroit and 39 percent in Blaine compared with September 2000. This slide continued in October 2001 with declines of 40 percent and 46 percent, respectively.

Figure 6 compares patterns in crossing volumes at the busiest northern and southern land ports during 2001. The data show a consistent and notable drop in personal vehicle border crossings starting in September, and this drop was more pronounced on the northern border where personal vehicles crossings at the top 10 ports were up just over 1 percent in August before dropping 26 percent in September and 33 percent in October (table 9). In

Figure 6
Top 5 Border Ports for Personal Vehicle Crossings
from Canada and Mexico: 2001



Source: U.S. Department of Transportation, Bureau of Transportation Statistics, special tabulation, February 2002; based on U.S. Department of Commerce, U.S. Customs Service, Office of Field Operations, *Operations Management Database CD*.

comparison, the top 10 southern ports saw crossings increase 6 percent in August 2001 compared with August 2000.

Overall, personal vehicle crossings on the southern border dropped 19 percent in September 2001 and 22 percent in October 2001 when compared with the same months in 2000. In December 2001, however, the decline was less severe on the U.S.-Mexican border, about 9 percent, and on the U.S.-Canadian border the drop was 13 percent compared with December 2000. Even though the decline was less severe in December 2001 than in the previous three months of 2001, the annual 2001 entries for personal vehicles were down when compared with 2000 totals.

Overseas Travel Trends

Fueled by cheaper airfares and a strong global economy, overseas travel volumes to and from the United States grew across the board in the 1990s, especially in the last half of the decade.¹² Between 1990 and 2000, U.S. international overseas travel grew from 31 million trips to 53 million, an increase of 70 percent (table 1). Europe¹³ is the top origin and destination for U.S. overseas travel, accounting for 25 million trips in 2000, an increase of 70 percent between 1990 and 2000. However, other regions experienced faster growth during this period. For example, trips between the United States and South America increased from 2 million in 1990 to 5 million in 2000, or 125 percent. At the same time, travel between Asia and the United States grew 81 percent from 7 million trips to just over 12 million trips.¹⁴

U.S. and international airports serve as key gateways for much of this overseas travel¹⁵ (table 10). In 2000, the top 20

¹² This section reviews trends in travel between the United States and overseas countries, for trips of one day or more (overnight). Overnight travel to and from Canada and Mexico is not specifically addressed here, but is examined in the earlier section on North American overnight travel.

¹³ Includes countries of Western and Eastern Europe.

¹⁴ Strong growth regions like Asia and South America are offset by moderate growth regions that have higher volumes of trips, resulting in a rise of 70 percent overall for U.S. overnight travel between 1990 and 2000.

¹⁵ International aviation airport pair, passenger, and departure information is derived from the U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 and T-100F data. T-100F data cover foreign carriers operating in the United States. The T-100 and T-100F segment data include all traffic arriving at and departing from U.S. airports on nonstop commercial international flights. These data represent only non-stop service. Air carriers that operate aircraft with 60 seats or less are not required to file T-100 data (T-100F for foreign carriers).

Table 10

Top 20 U.S. Gateways for Nonstop International Air Travel: 1990, 1995, and 2000
(Thousands of international passengers¹)

Rank in 2000	Gateway airport	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
1	New York Kennedy	16,144	16,266	18,444	14.3	1.3
2	Los Angeles	9,010	12,994	17,116	90.0	6.6
3	Miami	9,873	14,182	16,629	68.4	5.4
4	Chicago O'Hare	4,777	6,561	10,185	113.2	7.9
5	Newark	2,371	3,695	8,794	270.9	14.0
6	San Francisco	3,979	5,605	7,846	97.2	7.0
7	Atlanta Hartsfield	1,840	3,165	6,114	232.2	12.8
8	Houston	2,195	2,734	5,357	144.0	9.3
9	Honolulu	5,743	6,003	5,126	-10.7	-1.1
10	Dallas-Ft. Worth	2,675	3,337	4,812	79.9	6.0
11	Boston Logan	3,030	3,045	4,058	33.9	3.0
12	Detroit	1,460	2,772	3,929	169.1	10.4
13	Washington Dulles	1,260	2,624	3,896	209.2	11.9
14	Minneapolis-St. Paul	755	1,368	2,875	280.6	14.3
15	Guam Island	1,353	2,182	2,841	110.0	7.7
16	Philadelphia	775	1,119	2,554	229.7	12.7
17	San Juan	2,029	2,224	2,501	23.3	2.1
18	Orlando	1,327	2,010	2,354	77.4	5.9
19	Seattle	1,760	1,529	2,202	25.2	2.3
20	New York LaGuardia	1,456	1,284	1,315	-9.7	-1.0
	Total, top 20 U.S. international airports	73,811	94,699	128,948	74.7	5.7
	Top 20, percentage of total	87.0	89.7	89.8		
	Total, all U.S. international airports	84,864	105,572	143,537	69.1	5.4

¹ *International passengers* are residents of any country traveling nonstop to and from the United States on U.S. and foreign carriers.

SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 data, 2001.

NOTE: These data are from the T-100 and T-100F forms, which measure all traffic arriving at and departing from U.S. airports on nonstop commercial international flights with 60 seats or more.

U.S. gateway airports accounted for 90 percent of nonstop international air travel to and from the United States. John F. Kennedy (JFK) airport in New York served the highest number of international passengers¹⁶ in 2000, 18.4 million (figure 7). Other important U.S. gateways are Los Angeles, Miami, and Chicago, each handling more than 10 million international

¹⁶ *International passengers* are residents of any country traveling nonstop to and from the United States on U.S. and foreign carriers that operate aircraft with 60 seats or more.

Figure 7
**Top 20 U.S. Gateways for Nonstop Bidirectional
 International Air Travel: 1990 and 2000**



SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 and T-100F data.

passengers (see box 2, pages 39–41). Passenger traffic at other U.S. gateway airports increased noticeably during the 1990s. Minneapolis, Newark, and Atlanta grew the fastest in terms of international passengers. Honolulu and New York LaGuardia were the only gateways where international traffic decreased between 1990 and 2000.

Travelers arriving and departing from U.S. gateways are transported along major international routes linked by airport pairs (table 11). New York JFK-London Heathrow ranked first in bidirectional international air traffic, accounting for approximately 2.9 million bidirectional passengers in 2000. Heathrow

Table 11
**Top 20 Routes for U.S. International Airport
 Pair Passengers: 1990, 1995, and 2000**
 (Thousands of international passengers¹)

Rank in 2000	U.S. airport	Foreign airport	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
1	New York JFK	London Heathrow	2,084	2,101	2,870	37.7	3.3
2	Honolulu	Tokyo	2,107	2,284	1,805	-14.3	-1.5
3	Los Angeles	Tokyo	1,533	1,553	1,720	12.1	1.2
4	Los Angeles	London Heathrow	588	1,134	1,597	171.5	10.5
5	Chicago O'Hare	London Heathrow	433	681	1,466	239.0	13.0
6	Los Angeles	Taipei	258	972	1,141	342.2	16.0
7	New York JFK	Paris De Gaulle	1,033	623	1,042	0.9	0.1
8	San Francisco	London Heathrow	352	790	1,037	194.9	11.4
9	Washington Dulles	London Heathrow	420	655	1,018	142.2	9.2
10	Chicago O'Hare	Toronto	940	1,025	984	4.8	0.5
11	New York JFK	Frankfurt	1,056	813	940	-11.0	-1.2
12	Detroit	Amsterdam	7	365	925	² 13,185.9	63.1
13	Guam Island	Tokyo	748	677	908	21.4	2.0
14	Los Angeles	Mexico City	783	781	906	15.7	1.5
15	Los Angeles	Sydney	366	644	905	147.2	9.5
16	San Francisco	Tokyo	965	832	897	-7.1	-0.7
17	New York LaGuardia	Toronto	809	778	873	7.9	0.8
18	Orlando	London Gatwick	232	673	871	274.7	14.1
19	Los Angeles	Seoul	470	714	864	83.8	6.3
20	Boston Logan	London Heathrow	407	506	860	111.5	7.8
Total, top 20 routes			15,591	18,602	23,629	51.6	4.2
Total U.S. international passengers			84,864	105,572	143,537	69.1	5.4

¹ *International passengers* are residents of any country traveling nonstop to and from the United States on U.S. and foreign carriers that operate aircraft with 60 seats or more.

² Detroit to Amsterdam: This exceptional growth rate is due to a new alliance between Northwest and KLM beginning in 1990.

NOTE: Data measure nonstop air carrier service. The actual final destination or origin of a passenger may differ from the airport,

because the airports may represent transfer points rather than the traveler's final destination.

SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 and T-100F data, 2001.

also ranked fourth, fifth, eighth, and ninth with Los Angeles, Chicago O'Hare, San Francisco, and Washington Dulles, respectively, due in large part to its role as a transatlantic transfer point. Another U.S.-Europe pair, New York JFK-Paris Charles de Gaulle ranked seventh in 2000. The top U.S.-Asian airport pairs included Honolulu-Tokyo Narita, Los Angeles-Tokyo Narita, and Los Angeles-Taipei.

Several airport pairs experienced notable annual growth rates during the 1990s, including: Los Angeles-London Heathrow, Chicago O'Hare-London Heathrow, Los Angeles-Taipei, San Francisco-London Heathrow, Detroit-Amsterdam,

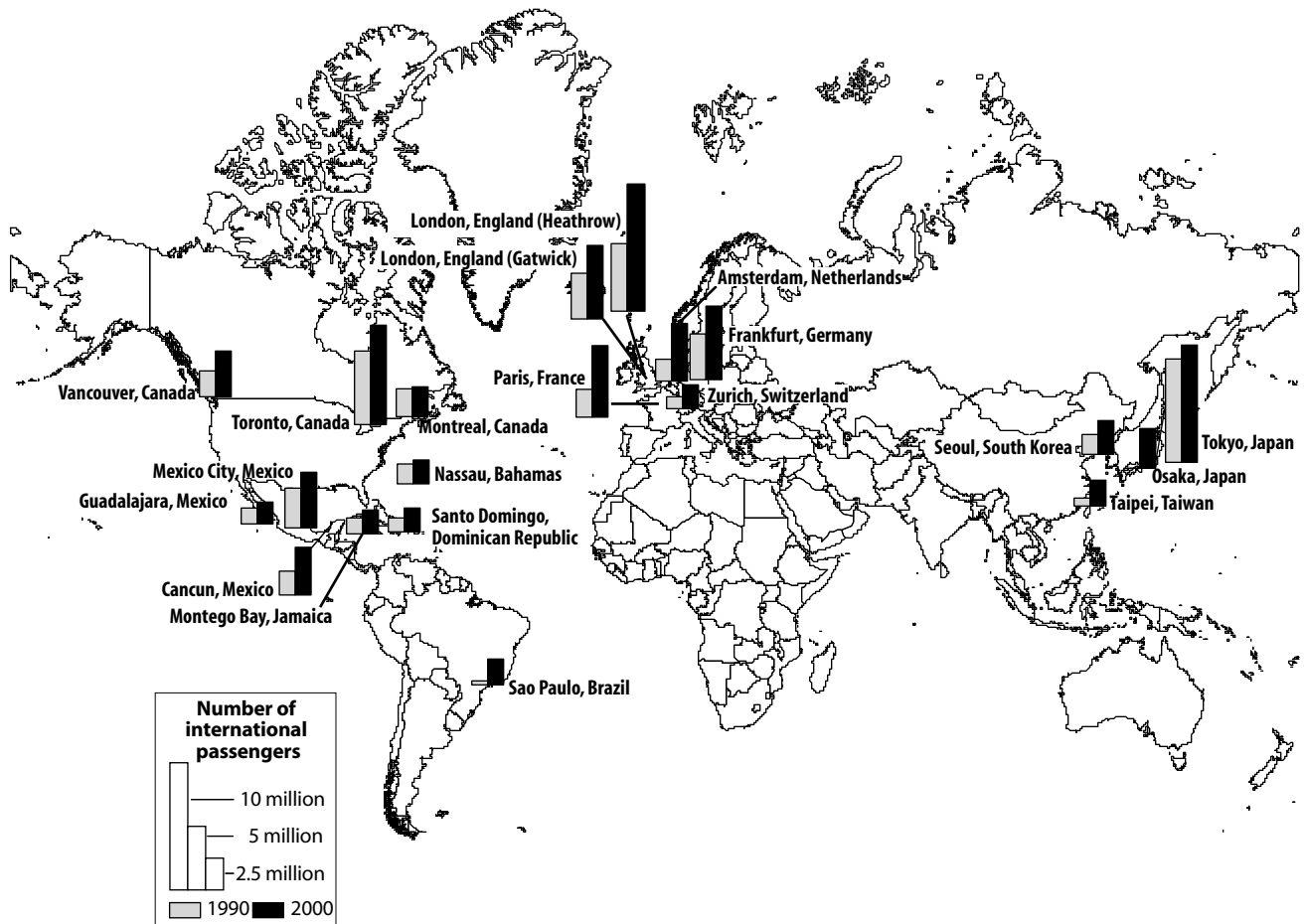
and Orlando-London Gatwick. Of these airport pairs, Detroit-Amsterdam experienced the greatest rate of growth by far. Traffic increased from about 7,000 international passengers in 1990 to over 900,000 in 2000, for an average annual growth rate of 63 percent during this period. This high growth rate is the result of an airline alliance between Northwest and KLM. Over 60 percent of the traffic on the Detroit-Amsterdam flights does not originate in either Detroit or Amsterdam. There are numerous spoke cities connecting to each of these hubs. By linking the hubs, the alliance created 16,240 connecting opportunities under a single code in the airlines' reservations systems (Airlines Gate 2002). Amsterdam is just one example of a foreign gateway airport that experienced steady increases in the number of international passengers it served through the 1990s. Figure 8 shows the geographic location of the top 20 foreign gateways around the world for international travel to and from the United States and the traffic increases over the last decade.

Outbound Overseas Travel

U.S. outbound overseas travel expanded consistently during the 1990s. In 2000, U.S. residents made more overseas trips than ever before, almost 27 million (table 2). Spurred by solid U.S. economic performance for most of the 1990s, American overseas visits grew at an annual rate of 5.3 percent between 1990 and 2000. During the 1990s, U.S. business and vacation travelers, keen on lower airfares and the expansion of their economic and leisure activities, increased their travel to all regions worldwide. Europe was the top destination for U.S. travelers in 2000, accounting for just over 13 million trips, up 66 percent from 8 million in 1990. During this same period, U.S. outbound travel to Asia, South America, and the Middle East grew by 93 percent, 130 percent, and 159 percent, respectively.

Although travel grew consistently during the 1990s, U.S. outbound overseas travel began to change in 2001. During the first six months of 2001, outbound overseas travel increased slightly when compared with 2000 levels. However, U.S. outbound overseas travel fell from 2000 levels by 30 percent in September 2001 and 28 percent in October 2001. Regionally, U.S. outbound travel decreased the most to the Middle East, falling 39 percent in September and 42 percent in October. The

Figure 8
**Top 20 Foreign Gateways for Nonstop Bidirectional
 Air Travel with the United States: 1990 and 2000**



SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 and T-100F data.

two most visited regions by U.S. residents (Europe and Asia) also experienced major declines in the number of trips following September 11. After modest growth in U.S. outbound trips destined for Europe and Asia in 2001 leading up to September, trips to these regions declined by 32 percent and 25 percent, respectively, in September compared with 2000. For European trips, the decline continued in October, falling to 35 percent below 2000 levels.

Prior to September 11, U.S. travel to less traditional destinations was becoming more frequent. Countries such as China

(including Hong Kong), Brazil, India, Turkey, and Poland saw travel from the United States more than double between 1990 and 2000 (table 12). Many of the countries with the sharpest growth rates were in Asia, in part prompted by the more active promotion of tourism by government agencies in those countries, the expansion of the scope of U.S. international business activities, and visits to friends and family by members of immigrant communities.

South American countries also drew increasingly large numbers of U.S. resident visitors during the 1990s. Trips to Brazil rose by 357 percent for the decade, placing the country among the top 20 visited by U.S. residents. Argentina and Chile, also ranking among the high-growth South American countries, more than doubled their number of U.S. resident visits between 1990 and 2000. In 1990, U.S. residents chose Columbia and Venezuela for the most trips to South America, but trip growth to these countries has stagnated since that time.

Although Eastern Europe accounted for only 1 percent of all U.S. resident outbound international travel in 2000, travel to that region increased over 150 percent from 1990 to 2000. With the fall of communism and the relaxation of travel restrictions, U.S. residents began to frequent destinations in such countries as Poland, the Czech Republic, Hungary, and Russia. In 2000, Poland and the Czech Republic were the top Eastern European destinations with just over a half million U.S. visits, combined. Poland was also the fastest growing Eastern European destination, showing a 460 percent increase in U.S. visits between 1990 and 2000.

Inbound Overseas Travel

Throughout the 1990s, the number of overseas visitors to the United States grew steadily. In 2000, overseas visitors to the United States made 26 million overnight trips (excluding Canada and Mexico), an increase of 73 percent from 1990 (table 2). European and Asian arrivals accounted for a large share of overseas trip growth to the United States during the past decade. The two regions, whose residents made 11.6 million and 7.6 million U.S. visits, respectively, accounted for almost three-quarters of all overseas trips to the U.S. in 2000.

Table 12
**Top 40 Foreign Countries Visited by U.S. Residents
 for Overnight Travel: 1990, 1995, and 2000**
 (Thousands of trips)

Rank in 2000	Country	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
	Total, all countries¹	44,625	50,837	60,816	36.3	3.1
1	Mexico	16,381	18,771	18,849	15.1	1.4
2	Canada	12,252	13,005	15,114	23.4	2.1
3	United Kingdom	2,943	2,821	4,189	42.3	3.6
4	France	1,681	1,849	2,927	74.1	5.7
5	Germany	1,877	1,601	2,309	23.0	2.1
6	Italy	1,166	1,429	2,148	84.2	6.3
7	China ²	624	1,181	1,476	136.5	9.0
8	Spain	587	610	1,262	115.0	8.0
9	Japan	1,103	839	1,262	14.4	1.4
10	Netherlands	379	743	1,101	190.5	11.3
11	Switzerland	751	724	994	32.4	2.8
12	Bahamas	1,011	934	913	-9.7	-1.0
13	Jamaica	480	1,086	886	84.6	6.3
14	South Korea	541	591	779	44.0	3.7
15	Ireland	NA	362	725	NA	NA
16	Australia	445	496	698	56.9	4.6
17	Brazil	147	305	671	356.5	16.4
18	Republic of China (Taiwan)	306	515	671	119.3	8.2
19	Israel	270	286	618	128.9	8.6
20	Austria	543	476	564	3.9	0.4
21	Belgium	347	362	457	31.7	2.8
22	Greece	331	457	457	38.1	3.3
23	India	116	305	457	294.0	14.7
24	Philippines	209	496	457	118.7	8.1
25	Singapore	211	343	457	116.6	8.0
26	New Zealand	224	172	457	104.0	7.4
27	Argentina	109	191	376	245.0	13.2
28	Thailand	206	286	376	82.5	6.2
29	Bermuda	79	267	322	307.6	15.1
30	Peru	125	229	322	157.6	9.9
31	Turkey	96	286	322	235.4	12.9
32	Sweden	204	229	295	44.6	3.8
33	Portugal	192	210	269	40.1	3.4
34	Czech Republic	NA	191	269	NA	NA
35	Poland	48	210	269	460.4	18.8
36	Venezuela	287	267	269	-6.3	-0.6
37	Denmark	236	229	242	2.5	0.3
38	Colombia	244	362	242	-0.8	-0.1
39	Egypt	110	343	215	95.5	6.9
40	Chile	64	172	188	193.8	11.4

¹ The aggregate figures for overnight trips differ from the sum of trips to or from individual countries, because a single outbound trip by a U.S. resident is counted once as an overnight trip but can be attributed to multiple countries.

² China includes Hong Kong.

KEY: NA = not available.

SOURCE: U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, "U.S. Resident Travel to Canada, Mexico and Overseas Countries: Historical Visitation Outbound," available at <http://tinet.ita.doc.gov>, as of July 1, 2001.

However, rates of growth for visitors from less traditional markets were generally greater during the 1990s as airfares dropped and travel options increased, due, in part, to international aviation market and policy liberalization and alliance-related efficiencies. Though ranked third for U.S. overseas arrivals, South America generated nearly 3 million visits to the U.S.—an 11 percent overseas share—in 2000, and grew faster than European and Asian arrivals between 1990 and 2000, with a 122 percent increase (USDOD ITA 2001b). Arrivals from Central America, the Middle East, and Africa also saw increases greater than 90 percent between 1990 and 2000. Yet, visits from these three regions still only constituted a combined 7 percent share of all U.S. overseas arrivals in 2000. Likewise, arrivals from Eastern Europe grew 112 percent for the period, but are nonetheless eclipsed by those from Western Europe at a ratio of over 26 to 1.

While overseas travel to the United States increased during the 1990s, arrivals began to decrease in 2001 due in part to the economic downturn in many countries, and then fell appreciably following September 11. Between January and August 2001, there were 4 percent fewer overseas arrivals to the United States when compared with the same months in 2000 (USDOD ITA 2002b). Record level monthly declines of 29 percent, 34 percent, and 29 percent then followed in September, October, and November 2001, respectively, compared with monthly totals in 2000. Among the top overseas nations for arrivals to the United States, Japan experienced the greatest U.S. inbound travel decline from September to November 2001 (table 13).

Prior to and after September 11, Canada and Mexico were the top countries for overall inbound travel to the United States (table 14). Japan accounted for the most inbound overseas arrivals in 2000 (5.1 million), followed by the United Kingdom (4.7 million) and Germany (1.8 million). As Japan's economy stagnated toward the close of the decade, the yen weakened and, as a result, its arrivals grew at a slower rate than those from the United Kingdom between 1990 and 2000.

Economic conditions in many countries influenced travel to the United States during the last decade. Visits from nations such as South Korea, Venezuela, Argentina, and Colombia more than doubled between 1990 and 2000. However, travel from

Table 13

Top 10 Overseas Countries of Origin for Overnight Arrivals in the United States: Percentage Decline for September, October, and November 2001

Rank in 2000 ¹	Country	Monthly percentage change		
		September 2000 and 2001	October 2000 and 2001	November 2000 and 2001
1	Japan	-45	-62	-62
2	United Kingdom	-27	-21	-25
3	Germany	-46	-44	-36
4	France	-34	-28	-18
5	Brazil	-49	-65	-50
6	South Korea	-20	-38	-25
7	Italy	-40	-52	-51
8	Venezuela	-21	-23	-3
9	Netherlands	-41	-34	-30
10	Australia	-36	-38	-31

¹ Ranked by total number of arrivals.

SOURCE: U.S. Department of Commerce, International Trade Administration, Office of Tourism Industries, *2001 Monthly Tourism Statistics: 2001 Monthly Arrivals to the United States*, available at <http://tinet.ita.doc.gov>, as of Mar. 21, 2002.

these countries closely mirrored the economic growth of the early 1990s, declined with the Asian and Latin American economic shocks of 1997 and 1998, and then rebounded along with the global economic recovery at the end of the 1990s.¹⁷ The connection between national economic performance and international travel was most clearly shown in the case of South Korea. Ranked only 19th in 1990, Koreans' total overnight trips to the United States grew at average annual rates exceeding 12 percent between 1990 and 2000. As a result of the 1997 Asian financial crisis, the Korean economy contracted and trips to the United States decreased by 50 percent from 1997 to 1998. In 1999 and 2000, however, South Korea rebounded with strong economic and travel growth. The net result was an overall 213 percent increase in overnight trips to the United States from 1990 to 2000.

Also notable is China's 97 percent rise in visits to the United States for the same period. Most of this growth is attributable to increased visits from mainland Chinese as opposed to those from Hong Kong. While arrivals to the United States from Hong Kong grew by a modest 24 percent from 1990 to 2000, trips made by mainland Chinese were up a remarkable 278 percent

¹⁷ Argentina also experienced trip growth stagnation in 1994 and 1995 due to its economic troubles.

Table 14
**Top 40 Countries of Origin for Overnight Arrivals
 in the United States: 1990, 1995, and 2000**
 (Thousands of trips)

Rank in 2000	Country	1990	1995	2000	Percentage change, 1990–2000	Annual growth rate (percent)
1	Canada	17,263	14,662	14,594	-15.5	-1.7
2	Mexico	7,041	8,016	10,322	46.6	3.9
3	Japan	3,231	4,598	5,061	56.6	4.6
4	United Kingdom	2,244	2,888	4,703	109.6	7.7
5	Germany	1,203	1,848	1,786	48.5	4.0
6	France	716	922	1,087	51.8	4.3
7	Brazil	398	838	737	85.0	6.3
8	South Korea	211	592	662	213.3	12.1
9	Italy	396	525	612	54.7	4.5
10	Venezuela	264	511	577	118.1	8.1
11	Netherlands	284	408	553	94.7	6.9
12	Australia	466	424	540	15.9	1.5
13	Argentina	185	382	534	189.2	11.2
14	Taiwan	239	413	457	91.3	6.7
15	China ¹	229	387	453	97.3	7.0
16	Colombia	155	233	417	169.1	10.4
17	Switzerland	294	397	395	34.5	3.0
18	Spain	243	302	361	48.8	4.1
19	Israel	162	216	325	101.1	7.2
20	Sweden	282	219	322	14.1	1.3
21	Bahamas	324	281	294	-9.4	-1.0
22	Ireland	99	149	286	188.1	11.2
23	India	110	123	274	149.1	9.6
24	Belgium	138	206	250	81.0	6.1
25	Jamaica	187	196	243	29.8	2.6
26	Dominican Republic	175	176	197	12.9	1.2
27	Chile	69	152	192	180.3	10.9
28	Peru	115	127	192	67.5	5.3
29	Guatemala	111	131	186	67.7	5.3
30	El Salvador	56	82	185	231.0	12.7
31	Costa Rica	80	118	176	119.8	8.2
32	Austria	107	173	176	64.2	5.1
33	New Zealand	174	142	172	-1.1	-0.1
34	Philippines	98	110	168	70.9	5.5
35	Denmark	97	108	149	54.1	4.4
36	Norway	104	103	148	41.9	3.6
37	Trinidad & Tobago	95	82	138	45.7	3.8
38	Singapore	54	103	136	154.7	9.8
39	Ecuador	72	98	130	81.5	6.1
40	Poland	61	48	116	91.1	6.7
	Total, top 40 countries of origin	37,830	41,491	48,306	27.7	2.5
	Total, all overnight trips	39,363	43,317	50,891	29.3	2.6

¹ China includes Hong Kong.

for the same period. The ratio of visits by mainland Chinese to the United States and Hong Kong travelers visiting the United States was a 5 to 4 proportion in 2000 compared with 2 to 5 in 1990 (table 14). Many factors influenced increased Chinese travel to the United States, including steady economic growth within China and some relaxation of travel regulations. Both of these helped spur more business and leisure visits to the United States.

Among the approximately 26 million overseas visits made to the United States in 2000, 15.9 million, or 61 percent, were made by people who identified themselves as leisure travelers while 7.8 million, or 30 percent, described themselves as business travelers.¹⁸ Yet, when asked specifically about their main trip purpose, the same overseas travelers to the U.S. cited leisure and recreation 46 percent of the time and business 26 percent of the time. Secondary reasons for visiting the United States included visiting friends and relatives (33 percent), convention attendance (9 percent), and study or teaching (4 percent).

Once foreign travelers enter the United States, they require transportation for a variety of purposes. Since the average overseas traveler visits at least two U.S. destinations and one-third of all overseas travelers visit two or more U.S. states, transportation between destinations is a priority (USDOT ITA 2001a). Transportation choices and services are issues confronting both international and domestic passengers at U.S. airports. As an illustration of overseas travelers' need for medium- to long-distance transportation options, a number of U.S. cities and their airports serve as ports of entry but not necessarily visitors' final destinations. For example, while 6 percent of overseas visitors to the United States in 2000 cited Newark, New Jersey, as their port of entry, only 1 percent listed Newark as a destination. On the other end of the spectrum, 6 percent of overseas visitors in 2000 entered the United States in San Francisco, but nearly 11 percent of these travelers characterized San Francisco as a destination (USDOT ITA 2001a).

In making trips to and from airports, as well as completing intracity travel and longer distance movements between U.S. cities, overseas visitors used a variety of travel modes in 2000. Of the approximately 26 million overseas visitors to the United

¹⁸ These estimates are based on survey data. Trip purpose will not sum to 100 because the survey allowed travelers to report more than one purpose or no trip purpose at all (see USDOT ITA 2001a).

States in 2000, approximately 41 percent took taxis, 33 percent drove or rode along in a rented automobile, and another 26 percent used a company or private car. For other transportation modes, 29 percent of overseas visitors flew within the United States, 20 percent used an urban subway, 10 percent boarded intercity buses, and 9 percent rode on intercity rail service in 2000 (USDOT ITA 2001a). As compared with all overseas travelers, business travelers were more likely to fly and drive while vacationers and people visiting friends and family took advantage of buses, subways, and trains more often.

Aviation in Focus

In 2000, air travel between the United States and foreign countries reached record levels. Between 1990 and 2000, the total number of nonstop passenger trips made by air between the United States and foreign countries increased by 69 percent from 85 million to 144 million (table 11). During this period, international enplanements¹⁹ on U.S. air carriers rose by 29 percent (USDOT BTS 1999; USDOT BTS OAI 2002). Not only did more passengers board international flights on U.S. carriers toward the end of the decade, but they also tended to journey to more distant destinations. International revenue passenger-miles²⁰ flown on U.S. carriers also increased from 124 billion in 1990 to 190 billion in 2000, a 52 percent increase in total distance, outpacing the growth in the number of enplanements (USDOT BTS OAI 2001a).

Such strong growth in international air travel was already beginning to slow in early 2001, and a downturn ensued following September 11, 2001. International revenue-passenger miles on U.S. carriers fell by 29 percent in September 2001 and 37 percent in October 2001, when compared with September and October 2000. International enplanements also declined by similar amounts—27 and 32 percent less compared with the same months in 2000.

¹⁹ *Revenue passenger enplanements* are the total number of passengers boarding aircraft, including both originating and connecting passengers.

²⁰ A *revenue passenger-mile* is defined as one revenue passenger transported one mile. A *revenue passenger* is defined as a person receiving air transportation from an air carrier for which the carrier received remuneration. Air carrier employees or others receiving air transportation (including infants) against whom token service charges are levied are considered nonrevenue passengers.

These large declines in revenue-passenger miles and enplanements reflect the drop in departures and load factors²¹ that followed the September 2001 terrorist attacks. After increasing during the first half of 2001, international departures by U.S. carriers decreased by 18 percent in September 2001 and 10 percent in October 2001 when compared with 2000 levels. Such declines were due to the closure of all the major gateway airports for several days and the reduction in airline service and schedules once they were reopened. In addition to the reduced international departures, international load factors dropped. U.S. commercial air carriers filled only 57 percent of their available international seat-miles²² in October 2001 compared with 75 percent in October 2000.

Factors of Growth

Several factors contributed to the tremendous growth in U.S. international air travel that occurred through 2000 including: aviation industry deregulation and privatization, global alliance formation among air carriers, strong economic growth, and increasing trade during the 1990s.

Changes in global aviation began in 1970s when U.S. airlines were deregulated.²³ At the same time, the international system remained tightly regulated, with many international carriers under the control of national governments. In such an environment, flying between countries was governed by bilateral agreements that were often restrictive on a number of levels, including the destinations served, the airlines and services available, and the prices charged. While the basic framework of bilateral agreements remains in place, in recent years, the U.S. government has advocated “Open Skies” agreements that are aimed at increasing competition, lowering fares, and improving service.

The United States signed the first Open Skies agreement with the Netherlands in 1992, and more recently, signed an agreement with France in January 2002. Open Skies agreements

²¹ *Revenue passenger load factor* is defined as revenue passenger-miles as a percent of available seat-miles in revenue passenger services. The term is used to represent the proportion of aircraft seating capacity that is actually sold and utilized.

²² *Available seat-miles* are defined as the aircraft-miles flown in each interairport hop multiplied by the number of seats available on that hop for revenue passenger service.

²³ U.S. airlines were deregulated following the passage of the Airline Deregulation Act of 1978.

permit unrestricted international air service between participating countries, allowing each country's airlines to fly between any city in its home country and any city in participating countries. In total, the United States is a signatory to 56 Open Skies agreements that are designed to afford carriers improved operating flexibility and service expansion. The agreements also facilitate the scheduling of connecting flights, greater capacity in specific gate-to-gate markets, and potentially lower prices due to increased flight options. A U.S. Department of Transportation (USDOT) study of the effect of airline deregulation on the U.S. transatlantic market found that average airfares from the United States to Open Skies markets fell more steeply than did ticket prices to non-Open Skies countries (USDOT OST 2000, p. 2). The decline was even greater for Open Skies fares to connecting markets beyond European gateways, such as those in Asia, Africa, and the Middle East.

While the U.S. government has advocated a liberalization of the international aviation industry for the past several decades, U.S. and international air carriers have entered into global business alliances as part of their strategies to compete in the global market. These alliances have allowed carriers to overcome national ownership rules and restrictions on travel routes. These arrangements between air carriers often include route access and marketing provisions such as code-sharing²⁴ and joint frequent-flier miles programs. They have also extended to more intense cooperation and business integration in the form of shared facilities and aircraft, as well as maintenance agreements.

Carrier alliances also have increased service and scheduling options for both small and large markets. USDOT examined global aviation alliances and found a marked increase in service to and from smaller markets and decreased fares on routes that included alliance gateways (USDOT OST 2000, p. 8). The report found that the number of markets and city-pairs served by alliances has increased greatly, offering more choices and travel flexibility for customers. For example, the Northwest/KLM alliance served 7,300 city-pairs worldwide in the third quarter of 1999 as compared with 1,400 city-pairs in the third quarter of 1992. The United/Lufthansa alliance increased

²⁴ *Code-sharing* is a common industry practice where one airline offers services in its own name for a particular city-pair, but some, or all, of the transportation is provided by another carrier.

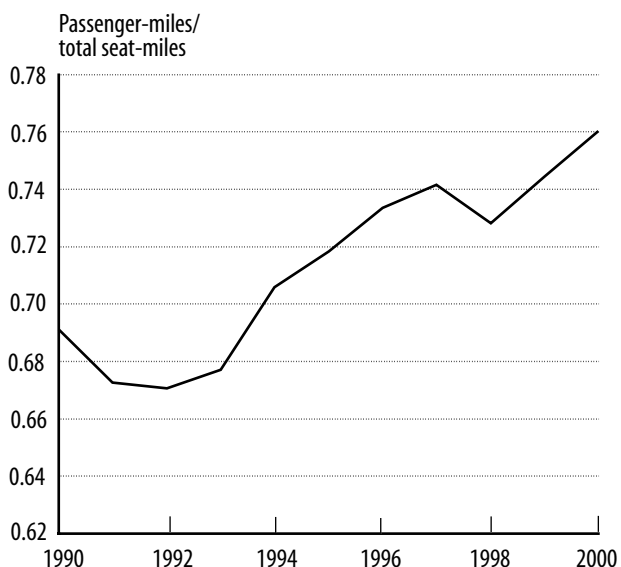
the number of city-pairs served from roughly 1,700 in the third quarter of 1992 to nearly 3,900 in the third quarter of 1999.

In a regional context, passenger traffic between the United States alliance gateways and the Far East, Middle East, and Africa has increased at an even greater pace than that to European destinations, which were already fairly well-served before the formation of the carrier alliances. As a result of the increased service and traffic to these regions, fares dropped during the 1990s for many alliance gateways. The greatest impact for air travel between the United States and Europe from alliance formation has been on routes involving small cities on both sides of the Atlantic. Some examples include the Birmingham, Alabama gateway, from which bidirectional traffic with small European cities increased by 99 percent from 1995 to 1999 while fares dropped an average 34 percent, and the Sioux Falls, South Dakota airport, from which traffic with small European cities grew by 117 percent and fares fell by 33 percent between 1995 and 1999 (USDOT OST 2000, pp. 13–14).

Technological exchange has also been a feature of some of the global carrier alliances and has helped to improve service and market shares for many carriers. Innovations in computer seat-demand modeling and internet bookings helped carriers to optimize their international revenue passenger load factors, a measure of occupied seating capacity, from 69 percent in 1990 to 76 percent in 2000 (figure 9).

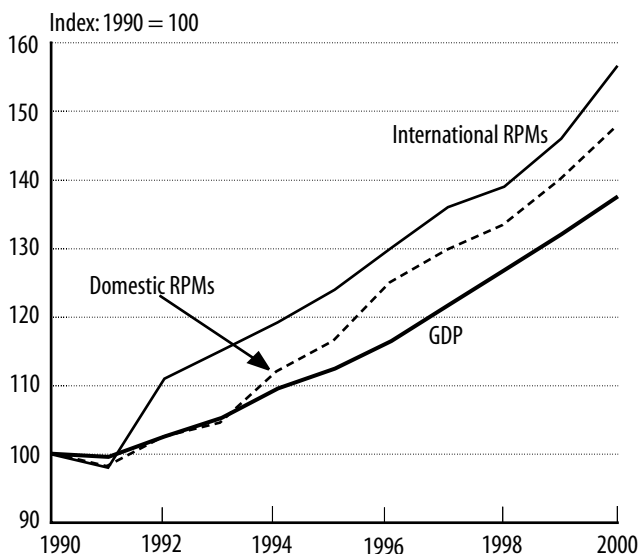
In addition to aviation deregulation and air carrier alliances, strong global economic growth helped spur increasing volumes of international passengers in the 1990s. From 1990 to 2000, the global economy grew by an annual average of 3.4 percent compared with 5.5 percent for the United States (both in current dollars) (IMF

Figure 9
Annual Load Factors for U.S. Carrier
International Flights: 1990–2000



SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, "Airline Industry Traffic Statistics," special tabulation, Aug. 10, 2001.

Figure 10
U.S. GDP and Aviation Revenue
Passenger-Miles: 1990–2000



KEY: GDP = gross domestic product; RPMs = revenue passenger-miles.

SOURCES: RPMs—U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, "Airline Industry Traffic Statistics," special tabulation, Aug. 10, 2001.

GDP—U.S. Department of Commerce, Bureau of Economic Analysis, "GDP Historical Data, 1929–2000," available at <http://www.bea.doc.gov/bea/dn1.htm>, as of Aug. 22, 2001.

2001b). As has historically held true, international travel increased in line with global economic growth. Between 1997 and 2000, U.S. gross domestic product grew at an even faster average annual rate—5.9 percent—compared with 1.9 percent for the world (IMF 2001a, 2001b). This coincided with years of aviation liberalization²⁵ and the time when the benefits of new global alliances were taking hold. U.S. international air travel volumes increased, as travelers with greater disposable income took advantage of improved flight options and lower fares (figure 10).

Aviation Security

In the aftermath of the terrorist attacks of September 11, 2001, aviation issues such as airport capacity

shortfalls, congestion, and liberalization—closely-related to large travel volumes—have taken a back seat to security concerns. When commercial flights resumed a few days after the attacks, there were noticeable changes in security procedures at U.S. airports. Airport screeners more frequently check bags by hand for explosives and weapons. (The list of objects that are prohibited for carry on because of their potential use as weapons has expanded to include, e.g., small knives, metal nail files, and corkscrews.) Similarly, screening has become a stricter process, in which laptops and other electronic devices must be removed from their cases before going through metal detectors. In addition, passengers are required to show legal forms of photo identification several times before take-off—at check-in, at the screening area, and finally, at the gate before boarding. Furthermore, at the gate, passengers may be pulled aside for another search, either at random or on the basis of suspicion.

²⁵ Of the 56 total U.S. bilateral Open Skies agreements, 43 have been entered into since 1997.

The present state of heightened security has essentially created a new environment of travel time, forcing passengers not only to count the total duration of delays and cancellations as possible inconveniences to their travel plans, but also to reserve ample time to clear security before each flight.

On November 19, 2001, President George W. Bush signed into law the Aviation and Transportation Security Act (Public Law 107-71). This act created the Transportation Security Administration (TSA) within USDOT that is intended to provide the nation's airports with federal screeners by November 19, 2002.²⁶ In addition, federal security directors, representing TSA, are being assigned to the nation's 429 major airports to ensure consistency in security standards and to oversee enforcement of procedures. The Aviation and Transportation Security Act also requires that sky marshals be onboard some U.S. flights,²⁷ requires cockpit doors to be strengthened, and mandates that all checked baggage be screened by explosive detection devices no later than December 31, 2002.²⁸ Until that date, all checked baggage must be inspected by other means, such as X-ray or by hand, or be subject to passenger matching (i.e., baggage may not be loaded on the plane unless it is confirmed that its owner is also on board.)

Conclusion: The Future Environment of U.S. International Travel and Transportation

Spurred by an expanding global economy, increasing disposable incomes, and growing travel and transportation services, international travel to and from the United States rose notably in the last decade. At the same time, changes occurred that affected both the demand for international travel and the supply of transportation services that enabled these flows. As this growth occurred, dominant gateways on the U.S.-Canadian and U.S.-

²⁶ The Act requires that all air carriers and commercial charter operators providing scheduled and charter services and enplaning passengers from the United States must have security programs that meet the established requirements. See Public Law 107-71 for details.

²⁷ Public Law 107-71 mandates their deployment on every passenger flight deemed a "high security risk" by the Secretary of Transportation (e.g., all flights to and from Washington, DC, Reagan National Airport). Marshals may or may not be present on other passenger flights.

²⁸ The Act also assigns TSA the duty of coordinating the security of the other transportation modes.

Mexican borders (Detroit, Buffalo, San Diego (San Ysidro) and El Paso) became key infrastructure points for North American passenger flows. Similarly, leading U.S. airports, such as New York JFK, Los Angeles, Atlanta, Chicago O'Hare, and Miami, served as critical points of entry for international passengers arriving and departing by air. These gateways and their surrounding infrastructure all experienced significant growth in recent years.

The September 11 attacks dramatically affected the United States on many levels, including our transportation system and services, and the effects will be felt for years to come. The travel industry was one of the sectors where this impact was most pronounced, including the demand for international travel as well as its provision by carriers and other service providers. Consequently, several questions will guide thinking about international travel and transportation in the near term: Will past growth rates continue or will they level off? Will patterns of international travel continue or will there be regional and country changes? How will the new security environment and concerns affect demand for international travel? How will the aviation sector respond to these market changes, and how will these affect planning for other transportation services?

The answers to all of these questions are, as of yet, uncertain. However, they will require careful monitoring and assessment, particularly in light of expected changes to policy and consumer demand. Although the level and nature of U.S. international travel may change in ways unanticipated prior to September 11, it is clear that pressure on border and gateway infrastructure as well as inland transportation systems will continue, especially given new security concerns. Balancing the efficient and effective flow of international travelers with these necessary security requirements will have important implications for transportation policies and planning in the short and long term.

Box 2

Spotlight on Two of America's International Air Gateways: John F. Kennedy International and Los Angeles International

Two of America's top international gateways, the John F. Kennedy International Airport (JFK) and the Los Angeles International Airport (LAX), handled over 35 million international inbound and outbound passengers in 2000. Nearly one in four U.S. international trips passed through these two airports (see table on next page). Effectively addressing security threats while continuing to serve the large number of passengers moving through these and other U.S. international airports is one key challenge.

JFK Airport

JFK (called Idlewild Airport until 1964) opened as New York's first international airport in 1948. Having longer runways than LaGuardia airport, Idlewild enabled propeller aircraft of those days to carry enough fuel for transatlantic flights. In 1957, the airport added a terminal serving foreign-flag carriers and handling international passengers arriving on all airlines. Today, this newly renovated facility is a huge complex with three gates that will be able to handle the world's largest civilian aircraft, called "super-jumbos," which will be in service in the next several years. These aircraft are larger than the Boeing 767, have a travel range of 7,500 nautical miles, and can carry 600 passengers on two decks.

During the past decade, international passenger traffic at JFK grew at an average annual rate of 2 percent. In 2000, the airport handled on average nearly 50,000 international passengers each day, traveling on over 80 U.S. and foreign airlines from more than 50 countries [1]. Four of the top 20 U.S. international airport pair gateways involve JFK. In 2000, JFK-London Heathrow was the leading U.S. international airport pair with over 2.9 million passengers (see table 11). JFK-Paris, JFK-Frankfurt, and JFK-Tokyo were the others.

Since 1995, JFK airport has offered U.S. frequent travelers U.S. Immigration and Naturalization Service electronic identity verification cards (INSPASS) to speed the massive flow of international passenger traffic through the airport more efficiently.¹ INSPASS reduces the amount of time it takes to get through immigration clearance by verifying identities electronically. Travelers insert their cards at the INSPASS kiosk and place their hands on an electronic reader.

¹ Three other U.S. international and two Canadian airports offer the INSPASS service: Los Angeles, Miami, San Francisco, Toronto, and Vancouver.

Their identity is automatically verified and they are sent on their way to baggage claims and Customs.² INSPASS can get travelers through immigration in as little as 15 seconds compared with an average of up to 5 minutes with an immigration inspector. Immediately after the September 11, 2001, terrorist attacks, the INSPASS program was suspended but has since been restored.

JFK's ability to handle growing demand is based primarily on its current airfield capacity (number and placement of runways and taxiways, types of navigational aid, and types of air traffic control and facilities). Other factors such as airline scheduling, aircraft performance, the mix of aircraft types, weather, and runway closures affect how much of the airport's capacity can be used at a given time and results in variability in capacity [2]. In 2000, JFK had an hourly arrival rate of 56 flights (domestic and international) and an hourly departure rate of 50 flights for a combined total of 82 flight operations per hour.³ The airport's current capacity benchmark is 88 to 89 flights per hour in good weather and 71 flights per hour in adverse weather conditions, including poor visibility, unfavorable winds, and heavy precipitation. Variability in airport capacity, when combined with the pattern of aircraft demand and scheduling, can result in airport congestion, typically leading to the formation of queues waiting for permission to land or takeoff. Congestion eventually results in passenger delay. On a typical day, when demand approaches or exceeds capacity for extended periods of time, any disruption can create persistent backlogs and delays.

Continued growth in passenger traffic is expected at JFK. In the near term, there are no plans for constructing additional runways to increase the physical airfield capacity. However, there are plans to improve operational efficiency for both good and adverse weather capacity by changing arrival and departure procedures, deploying advanced

² INSPASS is currently free and available to citizens of the United States, Canada, Bermuda, legal residents of the United States, and Visa Waiver Pilot program countries who take at least three international business trips per year.

³ Typically, total operations are less than the sum of hourly arrival and departure rates. The difference reflects runway configuration and use. While some runways allow more arrivals and others allow more departures, total operations reflect the number of arrivals and departures that can be handled simultaneously.

(Box 2 continued)

technology, and restructuring airspace to improve and provide more efficient air routes.

In the aftermath of the September 11 terrorist attacks, JFK has upgraded its security. Immediately after the attacks, the airport enforced new procedures that permit only ticket holders past airport security checkpoints. Since then, all passengers are also required to check in and get boarding passes before proceeding to the gates. Like other high-volume airports, security breaches are a significant concern. Because of the heightened security alert, a variety of situations ranging from forgotten purses to unattended boxes and luggage have triggered terminal closures for a number of hours. In November 2001, the airport closed for several hours after American Airlines Flight 587 from JFK to the Dominican Republic crashed in Queens, New York. Initially, terrorism was suspected, but was later ruled out.

Los Angeles International Airport

The site of the Los Angeles International Airport (originally known as Mines Field) has been used for general aviation since 1928. Prior to the construction of the municipal airport, pioneer aviators used part of the site as a makeshift landing strip where the aircraft of that time landed and departed on rough ground. Commercial airline service started in 1946 and the present terminal complex was constructed in 1961. The airport added the Tom Bradley International Terminal in 1984. This 963,000 square foot ter-

terminal has 11 aircraft gates and 18 gates served by buses that shuttle passengers from the terminal to remote aircraft parking pads.

In 2000, LAX handled nearly 17 million international passengers, about 25 percent of the total number of passengers using the airport. These international passengers traveled on U.S. airlines and over 50 foreign carriers between the United States and more than 40 countries. During the past decade, international passenger traffic through LAX has grown at an average annual rate of over 7 percent per year. Of the top 20 U.S. international airport pair gateways, 6 included LAX in 2000. The leading gateway pair was LAX-Tokyo with 1.7 million international passengers, followed by LAX-London Heathrow and LAX-Taipei, Taiwan. LAX, like JFK, also offers the INSPASS identification processing service to reduce the time it takes travelers to go through immigration clearance.

On average, there were about 81 departures and 83 arrivals per hour at LAX, for a combined total of 145 flight operations per hour in 2000. The airport's current capacity benchmark is 148 to 150 flights per hour in good weather and about 127 per hour under adverse conditions. Like JFK, LAX plans to use improvements in landing and takeoff procedures and deployment of advanced technology to increase capacity, mitigate airport congestion, and reduce passenger delays.

U.S. Nonstop International Air Passengers: Focus on JFK and LAX
(In thousands)

Rank in 2000	Gateway airport	1990	1992	1994	1996	1998	2000	Percentage change, 1990-2000	Annual growth rate (percent)
	Total, all U.S. international airports	84,864	89,875	98,598	113,269	125,360	143,537	69.1	5.4
1	New York JFK	16,144	14,404	15,154	16,697	17,201	18,444	14.3	1.3
2	Los Angeles LAX	9,010	10,543	12,365	14,020	14,933	17,116	90.0	6.6
	New York JFK, percentage of total	19.0	16.0	15.4	14.7	13.7	12.8		
	Los Angeles LAX, percentage of total	10.6	11.7	12.5	12.4	11.9	11.9		

NOTE: *International passengers* are residents of any country traveling nonstop to and from the United States on U.S. and foreign carriers that operate aircraft with 60 seats or more. These data are from forms T-100 and T-100F, which measure all traffic arriving at and departing from U.S. airports on nonstop commercial international flights with 60 seats or more.

SOURCE: U.S. Department of Transportation, Bureau of Transportation Statistics, Office of Airline Information, Segment T-100 and T-100F data, 2001.

(Box 2 continued)

Following the September 11 attacks, LAX enforced new procedures to fulfill the requirements of the new Aviation and Transportation Security Act.⁴ One of the key procedures requires that all passengers pick up a paper ticket before proceeding to the security screening stations, because only ticketed passengers are allowed past these points. Also, all passengers must have a photo identification card. Immediately after the attacks, the airport canceled curbside luggage check-in but has since resumed it.

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2. U.S. Department of Transportation, Federal Aviation Administration, *2000 Aviation Capacity Enhancement Plan*, December 2000, available at <http://www.faa.gov/ats/asc/00ACE.html>, as of Dec. 17, 2001.

⁴ President George W. Bush signed this Act into law (Public Law 107-71) on Nov. 19, 2001.

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