THE ROLE OF TRAVEL AND TOURISM IN AMERICA'S TOP 100 METROPOLITAN AREAS

Prepared for:

THE UNITED STATES CONFERENCE OF MAYORS

THE TRAVEL BUSINESS ROUNDTABLE

THE INTERNATIONAL ASSOCIATION OF CONVENTION AND VISITORS BUREAUS

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INTRODUCTION

As the focal points of economic activity in the United States, metropolitan areas are vital to the nation's economic development. While states are defined by geographic and political boundaries, metro areas are shaped by economic activity, sometimes across state or national borders. The concentration of people and business in metro areas creates unique economic conditions that give rise to new industries, speed the diffusion of knowledge, spur technological innovation, and increase productivity. The economic dynamism and creativity found in metro areas enables American industries to thrive in global competition. Historically, most of the largest U.S. industries began in cities, where access to labor, capital, and customers fostered business development. Today, metro areas generate more than 80% of the nation's employment, income, and production of goods and services.

This study focuses on the importance of travel and tourism to metropolitan areas. Travel and tourism as an industry is difficult to track because it is not a defined industry in standard industrial classifications. The reason for this is that the activities of the traveler span various industrial sectors, including accommodation, transportation, food and beverage services, retail trade, entertainment and others.

Despite the importance of these linked sectors, the economic significance of travel and tourism to America's cities is not well understood. Further 9/11-induced declines on travel activity in metropolitan areas have not been measured nor has the future path to recovery been laid out. This report presents the results of a consistent approach to quantifying the economic role of travel and tourism in U.S. metropolitan areas both before and since September 2001 as well as a forecast of the road ahead.

APPROACH

DRI•WEFA developed a consistent methodology for measuring travel and tourism using multiple data sources and modeling techniques to estimate visitor spending, gross metropolitan product (GMP) and employment across the top 100 cities—*selected on the basis of total economy Gross Metro Product*. In brief, the key data sources included detailed sectoral data on output and employment (4-digit detail), Smith Travel Research hotel sales, individual metro travel survey results for 14 cities (varied sources), and in-house data sets for industry GMP.

The combination of these data sources allowed DRI•WEFA to construct robust estimates of Gross Metro Product and associated employment by industry and by metro area. It is worth mentioning here that the reference point for this analysis is gross metropolitan product as developed by DRI•WEFA in separate research on behalf of the U.S. Conference of Mayors.

Spending estimates were allocated across the following nine industrial sectors:

Local Transit	Eating & Drinking Places	Retail
Air Transport	Hotels	Amusement & Recreation
Transport Services	Motion Pictures	Entertainment

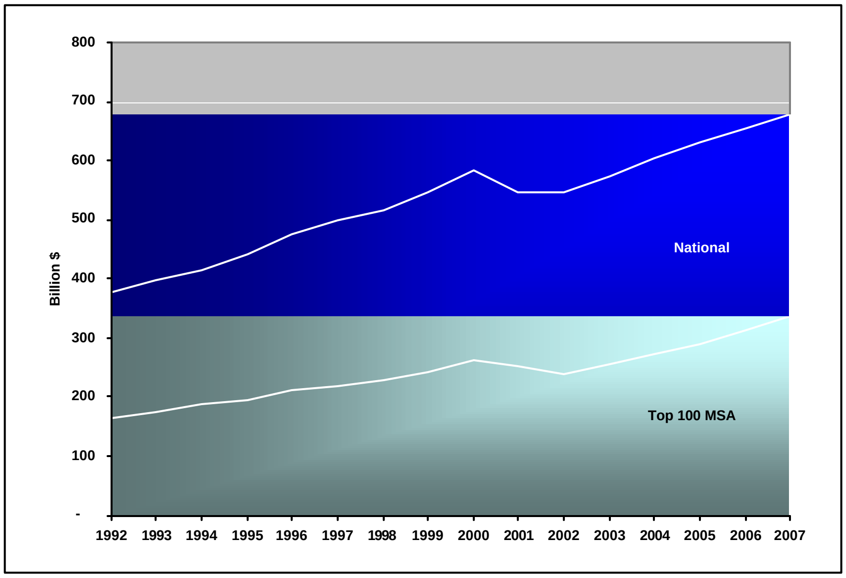
The methodology includes the effects on traveler spending tourism-related sectors and their direct suppliers but *excludes* any "multiplier" or income effect. Thus these estimates are in conformity with gross metro product definitions and should be recognized as conservative.

The result is a truly unique dataset, with comparable estimates of the economic value of travel and tourism for 100 U.S. metropolitan areas.

GROSS METRO PRODUCT

Travel and tourism generated $272 billion in GMP within the top 100 metros in 2000. In 2001, this figure fell to $259 billion and is expected to fall further to $245 billion in 2002. This equates to a 10.1% decline over this two year period.

FIGURE 1. TRAVEL & TOURISM IN THE TOP 100 METROPOLITAN AREAS AND U.S.



Travel and tourism generated an average 7.1% of total gross metro product (GMP) in the top 20 metros in 2000. For the purpose of comparison, health services are 5.5% of U.S. GDP, construction is 4.7%, banking is 3.7%, communications is 2.9% and electronic equipment manufacturing is 1.8% of U.S. GDP. In fact, no other sector[1] contributes as much to GDP at the national level as travel and tourism does to GMP for the top 20 metro areas.

For the top 100 metro areas, tourism was responsible for 4.0% of 2000 GMP. The impacts of the economic slowdown and the recession hit tourism harder than the overall economy and the share is predicted to drop to 3.6% in 2002.

New York, Las Vegas, Chicago, Los Angeles-Long Beach, and Atlanta head up the list in absolute terms composing $71 billion in travel and tourism Gross Metro Product in 2000. Travel and tourism in New York generated $17.6 billion; in Las Vegas, $14.8 billion; in Chicago, $14.0 billion; in Los Angeles, $13.6 billion; and in Atlanta, $11.2 billion.

In terms of percentage of GMP in 2000, travel and tourism generated 27.3% of economic production in Las Vegas; 13.9% in Honolulu; 12.3% in Orlando; 8.8% in Miami; and 7.6% in San Francisco. These cities are the most reliant on travel and tourism activity and have also been among the most affected economies during the travel downturn of the past thirteen months.

As mentioned earlier, travel and tourism in the top 100 metro areas was a $272 billion industry in 2000, contributing over 47% of national travel and tourism GDP in 2000 & 2001[2].

[1] Based on a 2-digit industry comparison

[2] Nationally, the industry generated $545 billion in expenditures in 2001 according to the Office of Travel and Tourism Industries and the Travel Industry Association (TIA).

This figure will drop to 45% in 2002 as metro areas have been the hardest hit by continued traveler spending declines.

TABLE 1. TOP 10 METRO AREAS TOURISM GMP, $ MILLION

	US Metro Area	2000	2001	2002	2002/2000
1	NEW YORK, NY	17,577	16,037	14,825	-16%
2	LAS VEGAS, NV-AZ	14,776	13,373	11,537	-22%
3	CHICAGO, IL	13,992	12,882	11,812	-16%
4	LOS ANGELES-LONG BEACH, CA	13,561	12,686	11,633	-14%
5	ATLANTA, GA	11,189	10,560	9,770	-13%
6	WASHINGTON, DC-MD-VA-WV	10,231	9,733	9,074	-11%
7	DALLAS, TX	9,809	9,060	8,301	-15%
8	SAN FRANCISCO, CA	8,418	7,575	6,693	-20%
9	HOUSTON, TX	7,643	7,474	6,920	-9%
10	BOSTON, MA	7,436	6,888	6,302	-15%
	Sum of Top 100 US Metros	**272,793**	**259,525**	**245,214**	**-10%**

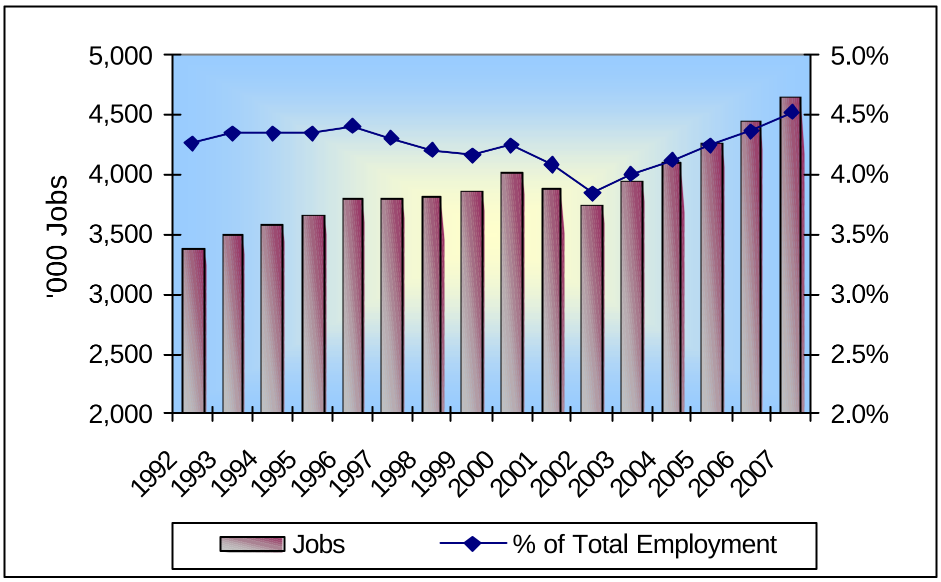
See Table A1 in the Appendix for full top 100 listing.

EMPLOYMENT

In 2001, there were 7.9 million jobs directly generated by the travel and tourism industry in the United States[3]. The top 100 metro areas accounted for 49% of national tourism employment in 2001 or 3.9 million jobs.

The impact of 9/11 and the economic slowdown hit the metro areas disproportionately hard. Travel and tourism-generated employment in the top 100 metro areas will fall from its peak of 4.0 million jobs in 2000 to 3.7 million jobs for the year 2002. Accordingly, the metro share of national tourism employment will decline a full percentage point to 48%. Without intervention, travel and tourism's employment generation in the top metro areas will not reach 2000 levels until 2004[4].

FIGURE 2. EMPLOYMENT IN TOP 100 METROPOLITAN AREAS



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[3] Source: TIA

[4] All projections assume no additional travel-related terrorist attack and no war with Iraq

Tourism employment accounted for 4.1% of total metro area jobs in 2000. Over 500,000 tourism-related jobs will have been lost within the top 100 metro areas on a full-time equivalency basis through 2002. The tourism share of total metro employment will drop accordingly to 3.5% this year in the top 100 metro areas.

TABLE 2. TOURISM GMP AND EMPLOYMENT AS A SHARE OF METRO TOTAL 2000

Rank	US Metro Area	Tourism Share of GMP	Tourism Share of Employment
1	LAS VEGAS, NV-AZ	27.3%	29.5%
2	HONOLULU, HI	13.9%	15.0%
3	ORLANDO, FL	12.3%	13.3%
4	MIAMI, FL	8.8%	9.5%
5	SAN FRANCISCO, CA	7.6%	8.2%
6	NEW ORLEANS, LA	6.8%	7.3%
7	ATLANTA, GA	6.7%	7.2%
8	FORT LAUDERDALE, FL	6.5%	7.0%
9	DALLAS, TX	6.1%	6.6%
10	PHOENIX-MESA, AZ	6.0%	6.4%
	Top 20 Metro Average	**7.1%**	**7.4%**

See Table A3 in the Appendix for full top 100 listing.

IMPACT OF THE INTERNATIONAL SEGMENT

Spending by international visitors in the United States is a significant contributor to the U.S. economy, comprising nearly 10% of total exports[5]. This exceeds the export value of major manufacturing industries including computer machinery, motor vehicles, aircraft, chemicals, metal products and textiles. Over the past 15 years, tourism exports (international visitor spending) have grown consistently faster than total exports for the United States.

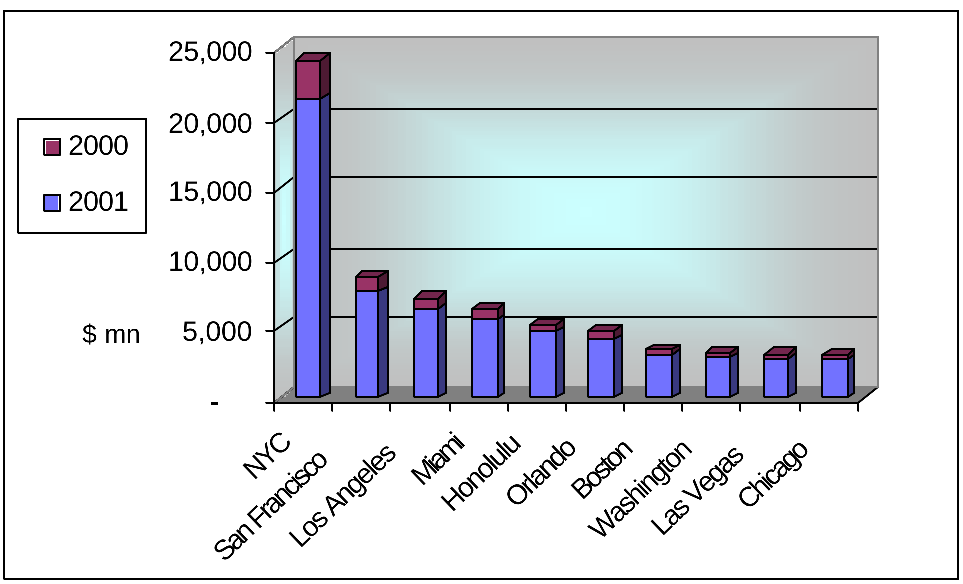
International visitors spent $90 billion traveling in the U.S. in 2001 while U.S. residents spent $82.3 billion traveling abroad. Accordingly, the U.S. economy realized a $7.7 billion travel trade surplus last year. The overwhelming majority of this trade surplus is accounted for by U.S. metropolitan areas. Based on visitor statistics and spending patterns, it is estimated that 90%, or $82 billion, of visitor export receipts are based within U.S metropolitan areas.

The combined effects of a global economic slowdown and 9/11-induced travel declines were felt most acutely by U.S. metropolitan areas. Metro economies suffered a loss of $10.7 billion in 2001 – an 11.6% decline - of which it is estimated $7.5 billion is attributable to the terrorist attacks. An additional $12.0 billion is expected to be forfeited in 2002. After the global economic slowdown is factored out, $5.0 billion of this is attributable to last year's tragedies. The cumulative impact of 9/11 on Gross Metro Product for the top 100 metro areas is $12.5 billion through 2002.

Barring a concerted effort on the part of the public and private sectors, international visits to the United States are not expected to recover to 2000 levels until 2004. The economic welfare to the largest metros in the United States is more linked to these international markets than non-metro areas which have a higher proportion of domestic travel.

The top 10 international tourism centers in the United States are shown below with estimates of visitor spending in 2000 and 2001.

FIGURE 3. TOP INTERNATIONAL VISITOR SPENDING METROS



[5] Tourism Exports are defined as the sum of international visitor travel and fare receipts.

The following table shows the value of visitor exports for the top U.S. international tourism U.S. metro areas. In addition, the total losses in 2001 and 2002 are broken out between the economic slowdown and 9/11.

TABLE 3. IMPACT OF 9/11 ON INTERNATIONAL VISITOR SPENDING

RANK	CITY	2000	2001	Total Loss - 2001	9/11 Impact - 2001	2002 Est.	Total Loss - 2002	9/11 Impact - 2002	Cumulative 9/11 Impact 2001 and 2002
	Total	**$92,724**	**$82,013**	**$10,711**	**$7,508**	**$80,779**	**$11,945**	**$5,024**	**$12,531**
1	New York City, NY	$24,205	$21,409	$2,796	$1,960	$21,087	$3,118	$1,311	$3,271
2	San Francisco, CA	$8,656	$7,656	$1,000	$701	$7,541	$1,115	$469	$1,170
3	Los Angeles, CA	$7,175	$6,346	$829	$581	$6,251	$924	$389	$970
4	Miami, FL	$6,373	$5,637	$736	$516	$5,552	$821	$345	$861
5	Oahu/Honolulu, HI	$5,276	$4,666	$609	$427	$4,596	$680	$286	$713
6	Orlando, FL	$4,775	$4,224	$552	$387	$4,160	$615	$259	$645
7	Boston, MA	$3,463	$3,063	$400	$280	$3,017	$446	$188	$468
8	Washington D.C. (Metro)	$3,271	$2,893	$378	$265	$2,849	$421	$177	$442
9	Las Vegas, NV	$3,207	$2,836	$370	$260	$2,794	$413	$174	$433
10	Chicago, IL	$3,053	$2,700	$353	$247	$2,660	$393	$165	$413
11	San Diego, CA	$1,598	$1,413	$185	$129	$1,392	$206	$87	$216
12	San Jose, CA	$1,349	$1,193	$156	$109	$1,175	$174	$73	$182
13	Atlanta, GA	$1,129	$999	$130	$91	$984	$145	$61	$153
14	Maui, HI	$1,044	$923	$121	$85	$909	$134	$57	$141
15	New Orleans, LA	$855	$756	$99	$69	$745	$110	$46	$116
16	Tampa/St. Petersburg, FL	$853	$754	$99	$69	$743	$110	$46	$115
17	Anaheim, CA	$844	$747	$97	$68	$735	$109	$46	$114
18	Dallas/Ft. Worth, TX	$835	$739	$96	$68	$728	$108	$45	$113
19	Seattle, WA	$820	$726	$95	$66	$715	$106	$44	$111
20	Ft. Lauderdale, FL	$805	$712	$93	$65	$701	$104	$44	$109
21	Philadelphia, PA	$787	$696	$91	$64	$685	$101	$43	$106
22	Newark, NJ	$671	$594	$78	$54	$585	$87	$36	$91
23	Phoenix, AZ	$670	$592	$77	$54	$583	$86	$36	$90
24	Houston, TX	$668	$591	$77	$54	$582	$86	$36	$90
25	Florida Keys, FL	$632	$559	$73	$51	$551	$81	$34	$85
26	Detroit, MI	$564	$499	$65	$46	$492	$73	$31	$76
27	Minn./St. Paul, MN	$522	$462	$60	$42	$455	$67	$28	$71
28	West Palm Beach, FL	$505	$446	$58	$41	$440	$65	$27	$68
29	Denver, CO	$447	$396	$52	$36	$390	$58	$24	$60
30	Riverside/San Bern., CA	$431	$382	$50	$35	$376	$56	$23	$58
	All other Metros	$7,242	$6,406	$837	$586	$6,309	$933	$392	$979

The stakes are extraordinarily high right now for the tourism export sector. The top U.S. metropolitan areas' economies are dependant upon international visitors, who spend over four times the average for domestic visitors. The top metro areas represent approximately 90% of all international visitor spending. Under present conditions, tourism exports will remain below 2000 levels until 2005.

INTERNATIONAL VISITOR SPENDING SCENARIO ANALYSIS

DRI•WEFA has developed two forecast scenarios for international visitor spending. The first scenario assumes a set of strategic and policy decisions that limit the recovery process and stunt tourism exports. The second scenario assumes a set of strategic and policy decisions that foster the recovery and growth of key tourism export markets. These key policy issues are described on the following page. The basis of these simulations is an econometric model for international inbound tourism developed on behalf of the U.S. Department of Commerce, Office of Travel and Tourism Industries.

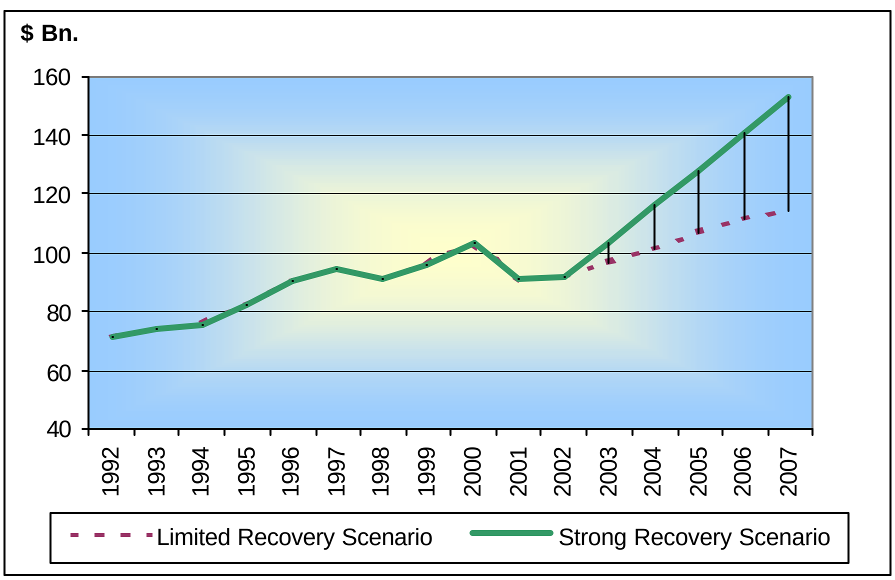
The following table shows the results under each of the two scenarios. The analysis is based on assumptions associated with the benefits of each of the issues at stake for the development of international travel to the United States.

TABLE 4. INTERNATIONAL TRAVEL SCENARIOS

	2000	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*
Limited Recovery Scenario, US Total ($ billion)	103.027	91.126	91.765	96.468	100.783	106.771	111.007	114.018
Strong Recovery Scenario, US Total ($ billion)	103.027	91.126	91.765	103.577	116.183	128.161	140.114	152.909
Limited Recovery Scenario (annual growth)	7.2%	-11.6%	0.7%	5.1%	4.5%	5.9%	4.0%	2.7%
Strong Recovery Scenario (annual growth)	7.2%	-11.6%	0.7%	12.9%	12.2%	10.3%	9.3%	9.1%
Limited Recovery Scenario, Metro Total ($ billion)	92.724	82.013	82.588	86.822	90.705	96.094	99.906	102.616
Strong Recovery Scenario, Metro Total ($ billion)	92.724	82.013	82.588	93.219	104.564	115.345	126.103	137.618
Impact on Top 100 Metropolitan Areas ($ billion)	0.000	0.000	0.000	6.397	13.860	19.251	26.196	35.002
Top 100 Metropolitan Areas (%)	0.0%	0.0%	0.0%	2.5%	5.1%	6.7%	8.5%	10.5%

The two scenarios diverge at an increasing rate over time as the effects of policies compound. The cumulative impact of these policy actions is dramatic, exceeding $100 billion over the period 2003-2007.

FIGURE 4. TWO SCENARIOS OF INTERNATIONAL TOURISM RECEIPTS



Key Policy Determinants

The four key issues defining the two scenarios are described below:

The Visa Waiver Program

The Visa Waiver Program has had a substantial impact on the number of overseas visitors to the US since it was introduced in 1988. International visitor arrivals have increased 49% over the twelve-year period from 1988-2000. Meanwhile total spending by international visitors —or Tourism Exports[6]—increased over 170% in the same period.

Assumption of Limited Recovery Scenario: Further tightening of Visa policy

Assumption of Strong Recovery Scenario: Expansion of Visa Waiver Program to Mexico

Marketing the U.S. Internationally

The United States is currently the only developed nation without a government funded campaign to market itself abroad. Federal funding to specific cities and states to undertake international destination marketing initiatives would, in the short term, begin to level the playing field among competing international destinations and would expedite recovery for the areas of the country most dependent upon international tourism.

Assumption of Limited Recovery Scenario: No Federal Funding for U.S. Tourism Marketing

Assumption of Strong Recovery Scenario: Federal funding of an international destination marketing campaign

Key Government Tourism Programs

The U.S. Department of Commerce Office of Travel and Tourism Industries currently maintains the only detailed source of market information on international tourism. This critically important data set provides the industry and public sector with detail on national origin of visitors, visitor characteristics and destinations visited within the United States. This information, derived from the Immigration & Naturalization Service I-94 form and In-Flight Survey, is a valuable guide for marketing and planning decisions of both the public and private sectors. These programs have been subject to reduced funding, which has limited the sample sizes and value of the information. In the absence of these programs, the travel industry would have no credible basis for strategic planning.

Further, recent funding for a national Travel and Tourism Satellite Account (TTSA) has enabled the Bureau of Economic Analysis to provide the tourism industry with detailed information on the economic value and composition of travel and tourism. This program also gives the United States a benchmark for international and inter-industry comparisons.

Assumption of Limited Recovery Scenario: Reduced funding for each of the above programs

Assumption of Strong Recovery Scenario: Increased funding for each of the above programs

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[6] Tourism Exports are defined as the sum of international visitor travel and fare receipts

High Level Governmental Representation

In many countries, tourism is a cabinet level appointment, reflecting the importance of the sector to economic development. Although a cabinet position would not be appropriate in the United States, the travel and tourism economy would benefit from the ability of its representatives to consistently inform public policy in light of current issues facing the sector. A federal tourism advisory council would serve this purpose.

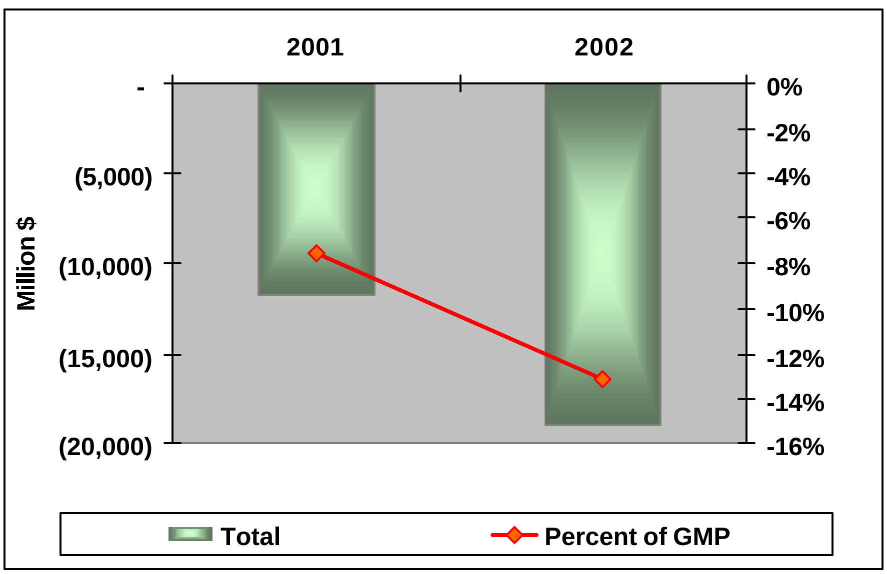
Assumption of Limited Recovery Scenario: Weakening of tourism representation

Assumption of Strong Recovery Scenario: Establishment of tourism advisory council

THE IMPACT OF 9/11 ON THE TRAVEL-BASED ECONOMY FOR THE TOP 20 TOURISM METRO AREAS

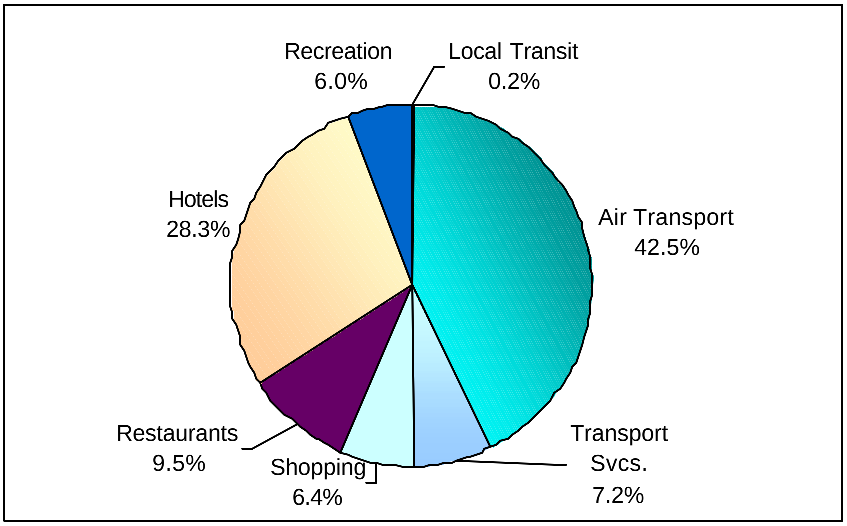
The top 20 tourism metro economies have been severely affected by events of the past year. Losses attributable to 9/11 exceeded $11 billion, or 8.0%, in 2001 and will reach $19 billion, or 15%, in 2002. This does not mean that travel and tourism will decline by this amount in 2002, but that in the absence of 9/11 an additional $19 billion would have been realized.

FIGURE 5. 9/11-RELATED LOSSES IN TRAVEL & TOURISM GMP TO TOP 20 METROS



There are several reasons for this disproportionate impact on the most significant tourism metro economies. The first, as mentioned earlier, is the strong international draw of major U.S. cities. The international markets were the most severely impacted. The second is the importance of aviation to major cities. The below chart illustrates the breakdown of travel and tourism GMP for the top 20 U.S. metro areas. The large size of air transport weighs heavily on U.S. cities as enplanements have been slow to recover and remain nearly 10% below 2000 levels.

FIGURE 6. ALLOCATION OF TRAVEL & TOURISM GMP IN TOP 20 METRO AREAS



The third reason the largest cities have been slow to recover has been the reliance on business travel for some of the key metro areas. Business travel has lagged leisure travel's comeback as companies have limited travel in a tight profit environment.

TABLE 5. IMPACT OF 9/11 ON GROSS METRO PRODUCT

Rank	US Metro Area	Level of Impact ($)		9/11 Impact on Tourism GMP[7]	
		2002	2001	2002	2001
1	New York	-2,330,925,588	-1,632,849,280	-15.72%	-10.18%
2	Chicago	-1,743,465,359	-1,192,719,623	-14.76%	-9.26%
3	Los Angeles-Long Beach	-1,515,665,178	-940,846,563	-13.03%	-7.42%
4	San Francisco	-1,400,230,865	-891,592,305	-20.92%	-11.77%
5	Las Vegas	-1,653,653,698	-852,138,500	-14.33%	-6.37%
6	Dallas	-1,138,393,365	-790,364,446	-13.71%	-8.72%
7	Orlando	-961,878,562	-678,088,879	-15.78%	-10.41%
8	Atlanta	-1,003,500,128	-671,895,417	-10.27%	-6.36%
9	Boston	-944,750,057	-591,535,131	-14.99%	-8.59%
10	Washington	-982,278,432	-569,820,541	-10.83%	-5.85%
11	Honolulu	-753,398,525	-461,525,904	-20.53%	-11.23%
12	Phoenix-Mesa	-760,103,914	-444,103,707	-13.18%	-7.03%
13	Miami	-768,274,029	-392,405,640	-12.94%	-6.30%
14	Minneapolis-St. Paul	-508,565,896	-323,373,085	-9.95%	-5.84%
15	Detroit	-468,734,359	-312,035,760	-11.58%	-7.13%
16	Newark	-497,110,436	-291,557,741	-11.47%	-6.11%
17	Seattle-Bellevue-Everett	-484,687,030	-273,891,463	-12.12%	-6.26%
18	San Diego	-378,189,622	-224,204,994	-8.60%	-4.86%

[7] Calculated as the difference between actual estimates and a "no-9/11" projection

19	Houston	-473,357,336	-202,744,276	-6.84%	-2.71%
20	Orange County	-197,767,932	-40,306,580	-5.10%	-0.98%
	Sum of Top 20 Metros	18,964,930,309	-11,777,999,835	-13.16%	-7.49%

APPENDIX TABLES

TABLE A1
TOP 100 METRO AREAS TOURISM GMP, $ MILLION

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9	HOUSTON, TX	7,643	7,474	6,920	-9%
10	BOSTON-WORCESTER-LAWRENCE-LOWELL-BROCKTON,	7,436	6,888	6,302	-15%
11	ORLANDO, FL	7,178	6,512	6,096	-15%
12	PHOENIX-MESA, AZ	6,720	6,320	5,768	-14%
13	MIAMI, FL	6,370	6,231	5,937	-7%
14	MINNEAPOLIS-ST. PAUL, MN-WI	5,838	5,533	5,113	-12%
15	NEWARK, NJ	5,052	4,772	4,333	-14%
16	SAN DIEGO, CA	4,780	4,614	4,397	-8%
17	DETROIT, MI	4,665	4,376	4,048	-13%
18	SEATTLE-BELLEVUE-EVERETT, WA	4,622	4,376	4,001	-13%
19	HONOLULU, HI	4,533	4,111	3,670	-19%
20	ORANGE COUNTY, CA	4,134	4,132	3,878	-6%
21	PHILADELPHIA, PA-NJ	4,088	3,851	3,449	-16%
22	DENVER, CO	4,076	3,878	3,729	-8%
23	TAMPA-ST. PETERSBURG-CLEARWATER, FL	3,504	3,537	3,520	0%
24	ST. LOUIS, MO-IL	3,465	3,398	3,337	-4%
25	PITTSBURGH, PA	3,405	3,349	3,265	-4%
26	CINCINNATI, OH-KY-IN	3,371	3,230	3,126	-7%
27	FORT LAUDERDALE, FL	2,976	2,848	2,680	-10%
28	NEW ORLEANS, LA	2,968	2,889	2,891	-3%
29	INDIANAPOLIS, IN	2,918	2,887	2,888	-1%
30	BALTIMORE, MD	2,869	2,837	2,818	-2%
31	OAKLAND, CA	2,648	2,640	2,656	0%
32	SALT LAKE CITY-OGDEN, UT	2,593	2,593	2,629	1%
33	RIVERSIDE-SAN BERNADINO, CA	2,549	2,482	2,512	-1%
34	CHARLOTTE-GASTONIA-ROCK HILL, NC-SC	2,520	2,352	2,238	-11%
35	KANSAS CITY, MO-KS	2,386	2,306	2,245	-6%
36	SAN JOSE, CA	2,354	2,320	2,349	0%
37	PORTLAND-VANCOUVER, OR-WA	2,286	2,281	2,310	1%
38	SAN ANTONIO, TX	2,216	2,236	2,284	3%
39	FORT WORTH-ARLINGTON, TX	2,110	2,067	2,010	-5%

	US Metro Area	2000	2001	2002	2002/2000
40	GREENSBORO-WINSTON SALEM-HIGH POINT, NC	1,998	1,969	1,932	-3%
41	NASHVILLE, TN	1,939	1,922	1,992	3%
42	CLEVELAND-LORAIN-ELYRIA, OH	1,864	1,866	1,877	1%
43	NORFOLK-VIRGINIA BEACH-NEWPORT NEWS, VA-NC	1,812	1,797	1,787	-1%
44	NASSAU-SUFFOLK, NY	1,693	1,627	1,614	-5%
45	WEST PALM BEACH-BOCA RATON, FL	1,577	1,523	1,454	-8%
46	RALEIGH-DURHAM-CHAPEL HILL, NC	1,547	1,510	1,497	-3%
47	MEMPHIS, TN-AR-MS	1,530	1,505	1,497	-2%
48	AUSTIN-SAN MARCOS, TX	1,476	1,465	1,476	0%
49	SACRAMENTO, CA	1,446	1,447	1,503	4%
50	JACKSONVILLE, FL	1,437	1,428	1,399	-3%
51	COLUMBUS, OH	1,355	1,329	1,341	-1%
52	OKLAHOMA CITY, OK	1,303	1,322	1,346	3%
53	DAYTON-SPRINGFIELD, OH	1,286	1,285	1,281	0%
54	MILWAUKEE-WAUKESHA, WI	1,131	1,113	1,098	-3%
55	NEW HAVEN-BRIDGEPORT-STAMFORD-DANBURY-WATER	1,118	1,071	977	-13%
56	GREENVILLE-SPARTANBURG-ANDERSON, SC	1,090	1,067	1,074	-1%
57	KNOXVILLE, TN	1,077	1,087	1,154	7%
58	ALBUQUERQUE, NM	1,054	1,065	1,087	3%
59	COLORADO SPRINGS, CO	1,031	1,019	1,022	-1%
60	HARTFORD, CT	936	915	834	-11%
61	LOUISVILLE, KY-IN	896	949	1,006	12%
62	TUCSON, AZ	875	855	834	-5%
63	LITTLE ROCK-NORTH LITTLE ROCK, AR	843	863	884	5%
64	RICHMOND-PETERSBURG, VA	825	819	812	-2%
65	ANN ARBOR, MI	756	757	760	0%
66	ALBANY-SCHENECTADY-TROY, NY	754	738	746	-1%
67	MIDDLESEX-SOMERSET-HUNTERDON, NJ	746	725	730	-2%
68	HARRISBURG-LEBANON-CARLISLE, PA	725	710	699	-4%
69	TULSA, OK	723	706	677	-6%
70	OMAHA, NE-IA	657	668	690	5%
71	BIRMINGHAM, AL	636	637	639	0%
72	BUFFALO-NIAGARA FALLS, NY	629	604	600	-5%
73	GRAND RAPIDS-MUSKEGON-HOLLAND, MI	569	564	569	0%
74	COLUMBIA, SC	554	528	527	-5%
75	ROCHESTER, NY	532	509	504	-5%
76	DES MOINES, IA	495	473	465	-6%
77	PROVIDENCE-WARWICK-PAWTUCKET, RI	489	508	491	0%
78	MONMOUTH-OCEAN, NJ	488	476	476	-2%
79	BERGEN-PASSAIC, NJ	451	411	383	-15%

	US Metro Area	2000	2001	2002	2002/2000
80	WICHITA, KS	448	437	433	-3%
81	SYRACUSE, NY	435	421	420	-3%
82	BOISE CITY, ID	432	442	440	2%
83	LEXINGTON, KY	416	410	431	3%
84	MADISON, WI	406	397	394	-3%
85	SCRANTON-WILKES BARRE-HAZLETON, PA	380	376	377	-1%
86	ALLENTOWN-BETHLEHEM-EASTON, PA	376	382	388	3%
87	TOLEDO, OH	374	368	368	-1%
88	WILMINGTON-NEWARK, DE-MD	352	336	327	-7%
89	LANCASTER, PA	321	310	306	-5%
90	CHATTANOOGA, TN-GA	304	290	288	-5%
91	FRESNO, CA	301	284	272	-10%
92	LANSING-EAST LANSING, MI	301	298	300	0%
93	BATON ROUGE, LA	292	279	275	-6%
94	VENTURA, CA	282	266	260	-8%
95	FORT WAYNE, IN	266	254	251	-5%
96	AKRON, OH	264	251	244	-7%
97	SPRINGFIELD, MA	195	192	179	-8%
98	YOUNGSTOWN-WARREN, OH	169	164	161	-4%
99	GARY, IN	163	158	161	-1%
100	JERSEY CITY, NJ	151	152	159	5%
	Sum of Top 100 US Metros	**272,793**	**259,525**	**245,214**	**-10%**

TABLE A2
TOP 100 METRO AREAS TOURISM EMPLOYMENT

	US Metro Area	2000	2001	2002	2002/2000
1	CHICAGO, IL	207,436	195,092	182,943	-12%
2	NEW YORK, NY	198,998	185,921	175,379	-12%
3	LAS VEGAS, NV-AZ	195,028	181,134	162,483	-17%
4	LOS ANGELES-LONG BEACH, CA	177,264	168,684	158,192	-11%
5	ATLANTA, GA	172,954	165,661	156,361	-10%
6	WASHINGTON, DC-MD-VA-WV	152,891	147,310	139,820	-9%
7	DALLAS, TX	140,661	132,600	124,270	-12%
8	ORLANDO, FL	127,901	119,000	113,301	-11%
9	PHOENIX-MESA, AZ	114,586	109,481	102,303	-11%
10	BOSTON-WORCESTER-LAWRENCE-LOWELL-BROCKTON	114,168	107,861	100,977	-12%
11	HOUSTON, TX	108,695	106,898	100,954	-7%
12	SAN FRANCISCO, CA	99,155	91,704	83,694	-16%
13	MINNEAPOLIS-ST. PAUL, MN-WI	96,405	92,631	87,363	-9%
14	DETROIT, MI	76,775	73,205	69,092	-10%
15	HONOLULU, HI	66,924	62,254	57,238	-14%
16	PHILADELPHIA, PA-NJ	65,624	62,771	57,853	-12%
17	NEWARK, NJ	64,545	61,865	57,593	-11%
18	SEATTLE-BELLEVUE-EVERETT, WA	63,944	61,389	57,443	-10%
19	SAN DIEGO, CA	63,461	61,810	59,626	-6%
20	ST. LOUIS, MO-IL	61,448	60,558	59,748	-3%
21	DENVER, CO	61,393	59,160	57,459	-6%
22	TAMPA-ST. PETERSBURG-CLEARWATER, FL	60,368	60,789	60,569	0%
23	CINCINNATI, OH-KY-IN	56,059	54,302	52,989	-5%
24	PITTSBURGH, PA	56,035	55,340	54,301	-3%
25	FORT LAUDERDALE, FL	53,359	51,636	49,353	-8%
26	ORANGE COUNTY, CA	51,834	51,819	49,425	-5%
27	INDIANAPOLIS, IN	51,423	51,005	51,020	-1%
28	NEW ORLEANS, LA	50,195	49,201	49,219	-2%
29	SALT LAKE CITY-OGDEN, UT	45,175	45,177	45,656	1%
30	BALTIMORE, MD	44,593	44,216	43,995	-1%
31	KANSAS CITY, MO-KS	40,868	39,843	39,056	-4%
32	CHARLOTTE-GASTONIA-ROCK HILL, NC-SC	37,916	36,013	34,704	-8%
33	NASHVILLE, TN	36,978	36,744	37,750	2%
34	PORTLAND-VANCOUVER, OR-WA	36,721	36,670	37,013	1%
35	SAN ANTONIO, TX	36,191	36,442	37,025	2%
36	RIVERSIDE-SAN BERNADINO, CA	35,648	34,949	35,263	-1%
37	OAKLAND, CA	34,601	34,519	34,682	0%
38	CLEVELAND-LORAIN-ELYRIA, OH	33,022	33,047	33,190	1%
39	GREENSBORO-WINSTON SALEM-HIGH POINT, NC	31,652	31,311	30,870	-2%
40	SAN JOSE, CA	31,402	31,063	31,361	0%

	US Metro Area	2000	2001	2002	2002/2000
41	WEST PALM BEACH-BOCA RATON, FL	30,686	29,904	28,887	-6%
42	FORT WORTH-ARLINGTON, TX	30,337	29,876	29,250	-4%
43	NORFOLK-VIRGINIA BEACH-NEWPORT NEWS, VA-NC	29,874	29,685	29,563	-1%
44	MEMPHIS, TN-AR-MS	27,013	26,687	26,571	-2%
45	OKLAHOMA CITY, OK	26,988	27,283	27,645	2%
46	RALEIGH-DURHAM-CHAPEL HILL, NC	26,848	26,370	26,198	-2%
47	AUSTIN-SAN MARCOS, TX	24,554	24,415	24,546	0%
48	DAYTON-SPRINGFIELD, OH	23,847	23,835	23,775	0%
49	NASSAU-SUFFOLK, NY	23,598	22,903	22,775	-3%
50	COLUMBUS, OH	23,007	22,680	22,838	-1%
51	KNOXVILLE, TN	21,986	22,135	23,149	5%
52	JACKSONVILLE, FL	21,864	21,755	21,428	-2%
53	MILWAUKEE-WAUKESHA, WI	21,671	21,409	21,189	-2%
54	GREENVILLE-SPARTANBURG-ANDERSON, SC	21,615	21,273	21,383	-1%
55	SACRAMENTO, CA	19,764	19,776	20,358	3%
56	LITTLE ROCK-NORTH LITTLE ROCK, AR	17,862	18,178	18,506	4%
57	MIAMI, FL	17,762	17,472	16,854	-5%
58	ALBUQUERQUE, NM	17,078	17,214	17,488	2%
59	COLORADO SPRINGS, CO	16,554	16,405	16,448	-1%
60	LOUISVILLE, KY-IN	15,990	16,709	17,461	9%
61	ANN ARBOR, MI	15,092	15,096	15,145	0%
62	NEW HAVEN-BRIDGEPORT-STAMFORD-DANBURY-WATER	14,530	14,077	13,151	-9%
63	TUCSON, AZ	13,711	13,476	13,229	-4%
64	TULSA, OK	13,525	13,286	12,879	-5%
65	RICHMOND-PETERSBURG, VA	12,787	12,712	12,628	-1%
66	OMAHA, NE-IA	12,478	12,625	12,944	4%
67	HARRISBURG-LEBANON-CARLISLE, PA	11,263	11,084	10,963	-3%
68	BIRMINGHAM, AL	11,147	11,151	11,174	0%
69	HARTFORD, CT	11,094	10,913	10,190	-8%
70	ALBANY-SCHENECTADY-TROY, NY	10,597	10,429	10,509	-1%
71	COLUMBIA, SC	10,271	9,911	9,894	-4%
72	GRAND RAPIDS-MUSKEGON-HOLLAND, MI	9,633	9,574	9,637	0%
73	MIDDLESEX-SOMERSET-HUNTERDON, NJ	9,095	8,910	8,952	-2%
74	WICHITA, KS	8,823	8,667	8,603	-2%
75	DES MOINES, IA	8,801	8,512	8,407	-4%
76	BUFFALO-NIAGARA FALLS, NY	8,697	8,435	8,394	-3%
77	LEXINGTON, KY	8,219	8,130	8,429	3%
78	MADISON, WI	8,030	7,898	7,855	-2%
79	ROCHESTER, NY	7,705	7,456	7,399	-4%
80	BOISE CITY, ID	7,703	7,835	7,808	1%
81	PROVIDENCE-WARWICK-PAWTUCKET, RI	7,540	7,762	7,569	0%
82	TOLEDO, OH	6,920	6,840	6,845	-1%
83	MONMOUTH-OCEAN, NJ	6,890	6,767	6,768	-2%

	US Metro Area	2000	2001	2002	2002/2000
84	SYRACUSE, NY	6,284	6,132	6,122	-3%
85	SCRANTON-WILKES BARRE-HAZLETON, PA	6,115	6,065	6,086	0%
86	ALLENTOWN-BETHLEHEM-EASTON, PA	5,928	5,992	6,067	2%
87	LANSING-EAST LANSING, MI	5,686	5,647	5,681	0%
88	BATON ROUGE, LA	5,458	5,273	5,226	-4%
89	BERGEN-PASSAIC, NJ	5,325	4,972	4,720	-11%
90	LANCASTER, PA	5,260	5,128	5,070	-4%
91	CHATTANOOGA, TN-GA	4,885	4,722	4,694	-4%
92	AKRON, OH	4,753	4,578	4,489	-6%
93	FORT WAYNE, IN	4,695	4,541	4,501	-4%
94	FRESNO, CA	4,642	4,437	4,305	-7%
95	WILMINGTON-NEWARK, DE-MD	4,427	4,277	4,190	-5%
96	VENTURA, CA	4,016	3,847	3,780	-6%
97	GARY, IN	3,331	3,252	3,297	-1%
98	YOUNGSTOWN-WARREN, OH	3,289	3,216	3,179	-3%
99	SPRINGFIELD, MA	2,992	2,957	2,813	-6%
100	JERSEY CITY, NJ	1,557	1,564	1,615	4%
	Sum Top 100	4,026,384	3,885,184	3,733,050	-7%

TABLE A3.
TOURISM GMP AND EMPLOYMENT AS A SHARE OF METRO TOTAL
2000

Rank	US Metro Area	Tourism Share of GMP	Tourism Share of Employment
1	LAS VEGAS, NV-AZ	27.3%	29.5%
2	HONOLULU, HI	13.9%	15.0%
3	ORLANDO, FL	12.3%	13.3%
4	MIAMI, FL	8.8%	9.5%
5	SAN FRANCISCO, CA	7.6%	8.2%
6	NEW ORLEANS, LA	6.8%	7.3%
7	ATLANTA, GA	6.7%	7.2%
8	FORT LAUDERDALE, FL	6.5%	7.0%
9	DALLAS, TX	6.1%	6.6%
10	PHOENIX-MESA, AZ	6.0%	6.4%
11	COLORADO SPRINGS, CO	5.7%	6.2%
12	CINCINNATI, OH-KY-IN	5.7%	6.1%
13	SALT LAKE CITY-OGDEN, UT	5.5%	5.9%
14	NEWARK, NJ	5.2%	5.7%
15	KNOXVILLE, TN	5.1%	5.5%
16	INDIANAPOLIS, IN	5.0%	5.4%
17	WEST PALM BEACH-BOCA RATON, FL	4.8%	5.2%
18	MINNEAPOLIS-ST. PAUL, MN-WI	4.8%	5.1%
19	WASHINGTON, DC-MD-VA-WV	4.7%	5.1%
20	LITTLE ROCK-NORTH LITTLE ROCK, AR	4.5%	4.9%
21	HOUSTON, TX	4.5%	4.8%
22	SAN DIEGO, CA	4.4%	4.8%
23	DENVER, CO	4.4%	4.7%
24	NASHVILLE, TN	4.3%	4.7%
25	TAMPA-ST. PETERSBURG-CLEARWATER, FL	4.3%	4.7%
26	CHICAGO, IL	4.2%	4.5%
27	PITTSBURGH, PA	4.2%	4.5%
28	DAYTON-SPRINGFIELD, OH	4.2%	4.5%
29	SAN ANTONIO, TX	4.1%	4.4%
30	ALBUQUERQUE, NM	4.1%	4.4%
31	GREENSBORO-WINSTON SALEM-HIGH POINT, NC	4.1%	4.4%
32	ANN ARBOR, MI	4.0%	4.4%
33	OKLAHOMA CITY, OK	4.0%	4.3%
34	NEW YORK, NY	4.0%	4.3%
35	SEATTLE-BELLEVUE-EVERETT, WA	3.9%	4.3%
36	ST. LOUIS, MO-IL	3.9%	4.2%
37	TUCSON, AZ	3.9%	4.2%
38	MEMPHIS, TN-AR-MS	3.9%	4.2%
39	CHARLOTTE-GASTONIA-ROCK HILL, NC-SC	3.8%	4.1%

Rank	US Metro Area	Tourism Share of GMP	Tourism Share of Employment
40	GREENVILLE-SPARTANBURG-ANDERSON, SC	3.7%	4.0%
41	KANSAS CITY, MO-KS	3.6%	3.9%
42	LOS ANGELES-LONG BEACH, CA	3.6%	3.9%
43	NORFOLK-VIRGINIA BEACH-NEWPORT NEWS, VA-NC	3.5%	3.8%
44	RALEIGH-DURHAM-CHAPEL HILL, NC	3.4%	3.7%
45	FORT WORTH-ARLINGTON, TX	3.4%	3.7%
46	JACKSONVILLE, FL	3.4%	3.7%
47	PORTLAND-VANCOUVER, OR-WA	3.1%	3.4%
48	AUSTIN-SAN MARCOS, TX	3.1%	3.4%
49	ORANGE COUNTY, CA	3.1%	3.3%
50	BALTIMORE, MD	3.0%	3.3%
51	BOSTON-WORCESTER-LAWRENCE-LOWELL-BROCKTON,	3.0%	3.2%
52	DETROIT, MI	3.0%	3.2%
53	RIVERSIDE-SAN BERNADINO, CA	3.0%	3.2%
54	TULSA, OK	2.9%	3.1%
55	COLUMBIA, SC	2.9%	3.1%
56	BOISE CITY, ID	2.9%	3.1%
57	OAKLAND, CA	2.8%	3.0%
58	HARRISBURG-LEBANON-CARLISLE, PA	2.7%	2.9%
59	SAN JOSE, CA	2.6%	2.8%
60	DES MOINES, IA	2.6%	2.8%
61	WICHITA, KS	2.6%	2.8%
62	OMAHA, NE-IA	2.5%	2.7%
63	LEXINGTON, KY	2.4%	2.6%
64	LOUISVILLE, KY-IN	2.3%	2.5%
65	CLEVELAND-LORAIN-ELYRIA, OH	2.3%	2.5%
66	SACRAMENTO, CA	2.3%	2.4%
67	COLUMBUS, OH	2.3%	2.4%
68	PHILADELPHIA, PA-NJ	2.2%	2.4%
69	MADISON, WI	2.2%	2.4%
70	MILWAUKEE-WAUKESHA, WI	2.1%	2.3%
71	ALBANY-SCHENECTADY-TROY, NY	2.0%	2.2%
72	BIRMINGHAM, AL	2.0%	2.2%
73	LANCASTER, PA	1.9%	2.1%
74	RICHMOND-PETERSBURG, VA	1.9%	2.0%
75	SCRANTON-WILKES BARRE-HAZLETON, PA	1.9%	2.0%
76	LANSING-EAST LANSING, MI	1.8%	2.0%
77	ALLENTOWN-BETHLEHEM-EASTON, PA	1.8%	2.0%
78	TOLEDO, OH	1.8%	2.0%
79	CHATTANOOGA, TN-GA	1.7%	1.8%
80	NASSAU-SUFFOLK, NY	1.6%	1.7%
81	MONMOUTH-OCEAN, NJ	1.5%	1.7%
82	BATON ROUGE, LA	1.5%	1.6%

Rank	US Metro Area	Tourism Share of GMP	Tourism Share of Employment
83	SYRACUSE, NY	1.5%	1.6%
84	NEW HAVEN-BRIDGEPORT-STAMFORD-DANBURY-WATER	1.5%	1.6%
85	PROVIDENCE-WARWICK-PAWTUCKET, RI	1.4%	1.6%
86	HARTFORD, CT	1.4%	1.6%
87	FORT WAYNE, IN	1.4%	1.6%
88	GRAND RAPIDS-MUSKEGON-HOLLAND, MI	1.3%	1.5%
89	BUFFALO-NIAGARA FALLS, NY	1.3%	1.4%
90	AKRON, OH	1.2%	1.3%
91	ROCHESTER, NY	1.2%	1.3%
92	WILMINGTON-NEWARK, DE-MD	1.2%	1.3%
93	MIDDLESEX-SOMERSET-HUNTERDON, NJ	1.2%	1.3%
94	FRESNO, CA	1.1%	1.2%
95	VENTURA, CA	1.1%	1.2%
96	YOUNGSTOWN-WARREN, OH	1.1%	1.2%
97	GARY, IN	1.0%	1.1%
98	SPRINGFIELD, MA	0.9%	1.0%
99	BERGEN-PASSAIC, NJ	0.7%	0.8%
100	JERSEY CITY, NJ	0.5%	0.6%
	Sum Top 100	4.0%	4.2%

TABLE A4.
IMPACT OF 9/11 ON GROSS METRO PRODUCT

Rank	US Metro Area	Level of Impact ($)		9/11 Impact on Tourism GMP[8]	
		2002	2001	2002	2001
1	New York	-2,330,925,588	-1,632,849,280	-15.72%	-10.18%
2	Chicago	-1,743,465,359	-1,192,719,623	-14.76%	-9.26%
3	Los Angeles-Long Beach	-1,515,665,178	-940,846,563	-13.03%	-7.42%
4	San Francisco	-1,400,230,865	-891,592,305	-20.92%	-11.77%
5	Las Vegas	-1,653,653,698	-852,138,500	-14.33%	-6.37%
6	Dallas	-1,138,393,365	-790,364,446	-13.71%	-8.72%
7	Orlando	-961,878,562	-678,088,879	-15.78%	-10.41%
8	Atlanta	-1,003,500,128	-671,895,417	-10.27%	-6.36%
9	Boston	-944,750,057	-591,535,131	-14.99%	-8.59%
10	Washington	-982,278,432	-569,820,541	-10.83%	-5.85%
11	Honolulu	-753,398,525	-461,525,904	-20.53%	-11.23%
12	Phoenix-Mesa	-760,103,914	-444,103,707	-13.18%	-7.03%
13	Miami	-768,274,029	-392,405,640	-12.94%	-6.30%
14	Minneapolis-St. Paul	-508,565,896	-323,373,085	-9.95%	-5.84%
15	Detroit	-468,734,359	-312,035,760	-11.58%	-7.13%
16	Newark	-497,110,436	-291,557,741	-11.47%	-6.11%
17	Seattle-Bellevue-Everett	-484,687,030	-273,891,463	-12.12%	-6.26%
18	San Diego	-378,189,622	-224,204,994	-8.60%	-4.86%
19	Houston	-473,357,336	-202,744,276	-6.84%	-2.71%
20	Orange County	-197,767,932	-40,306,580	-5.10%	-0.98%
	Sum of Top 20 Metros	18,964,930,309	-11,777,999,835	-13.16%	-7.49%

[8] Calculated as the difference between actual estimates and a "no-9/11" projection