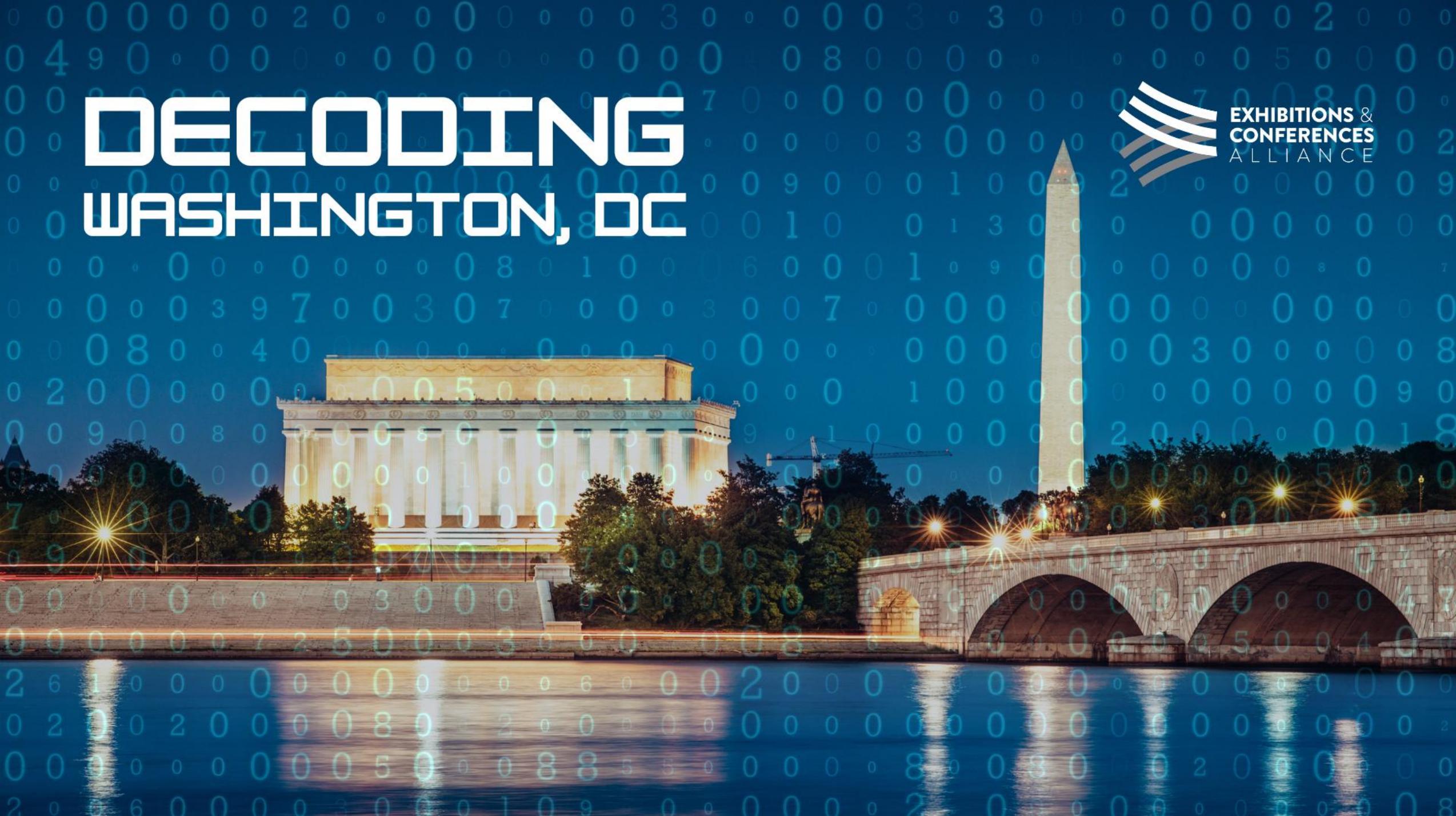


DECODING WASHINGTON, DC



EXHIBITIONS &
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Discussion for global warming and terrorism issues.

'A hostile state': Why some travellers are avoiding the US



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Discussion for global warming and terrorism issues.

Tariffs signal 'America is closed for business'





Trump's Impact on U.S. Tourism: A Looming Crisis

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Will Tariffs Squash Meetings and Incentive Travel?



RISK
OPPORTUNITY

A chalkboard with the words "RISK" and "OPPORTUNITY" written on it in white chalk. The word "RISK" is positioned above "OPPORTUNITY". Two large, hand-drawn white arrows point outwards from the space between the two words, one pointing towards the left and one towards the right. The chalkboard is resting on a dark, textured surface, possibly asphalt or concrete. At the bottom of the frame, the tips of two brown leather dress shoes are visible, suggesting a person is standing on the chalkboard.



Start Here



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ECA TARIFF TRACKER

- **Tariffs imposed on \$987.7 billion in imported goods**
 - New tariffs imposed since January 20, 2025
 - China: \$444.9 billion
 - Impact on US:
 - GDP: -0.4%
 - Inflation: +0.3%
 - Revenue: \$68.6 billion (up 77.8% year over year)



ECA TARIFF TRACKER (CONT.)

- **New tariffs currently in effect (“Section 232” tariffs)**

- 25% on steel and aluminum
- 25% on automotive sector

- **Section 232 tariffs likely forthcoming:**

- Semiconductors and other electronics
- Pharmaceuticals
- Minerals
- Copper
- Timber and lumber
- Food imports

25% rate likely



ECA TARIFF TRACKER (CONT.)

- **New tariffs in limbo (“IEEPA” tariffs)**
 - 10% “baseline” tariff on all trading partners
 - “Reciprocal” tariffs on specific US trading partners
 - 20-50% proposed tariffs on European Union
 - 20% “fentanyl” tariffs on China
 - 25% “fentanyl” tariffs on Canada and Mexico (non-USMCA compliant)
- **Legal situation**
 - May 28: federal trade court declared IEEPA tariffs illegal
 - May 29: appeals court leaves intact until June 5





EQUAL JUSTICE UNDER LAW

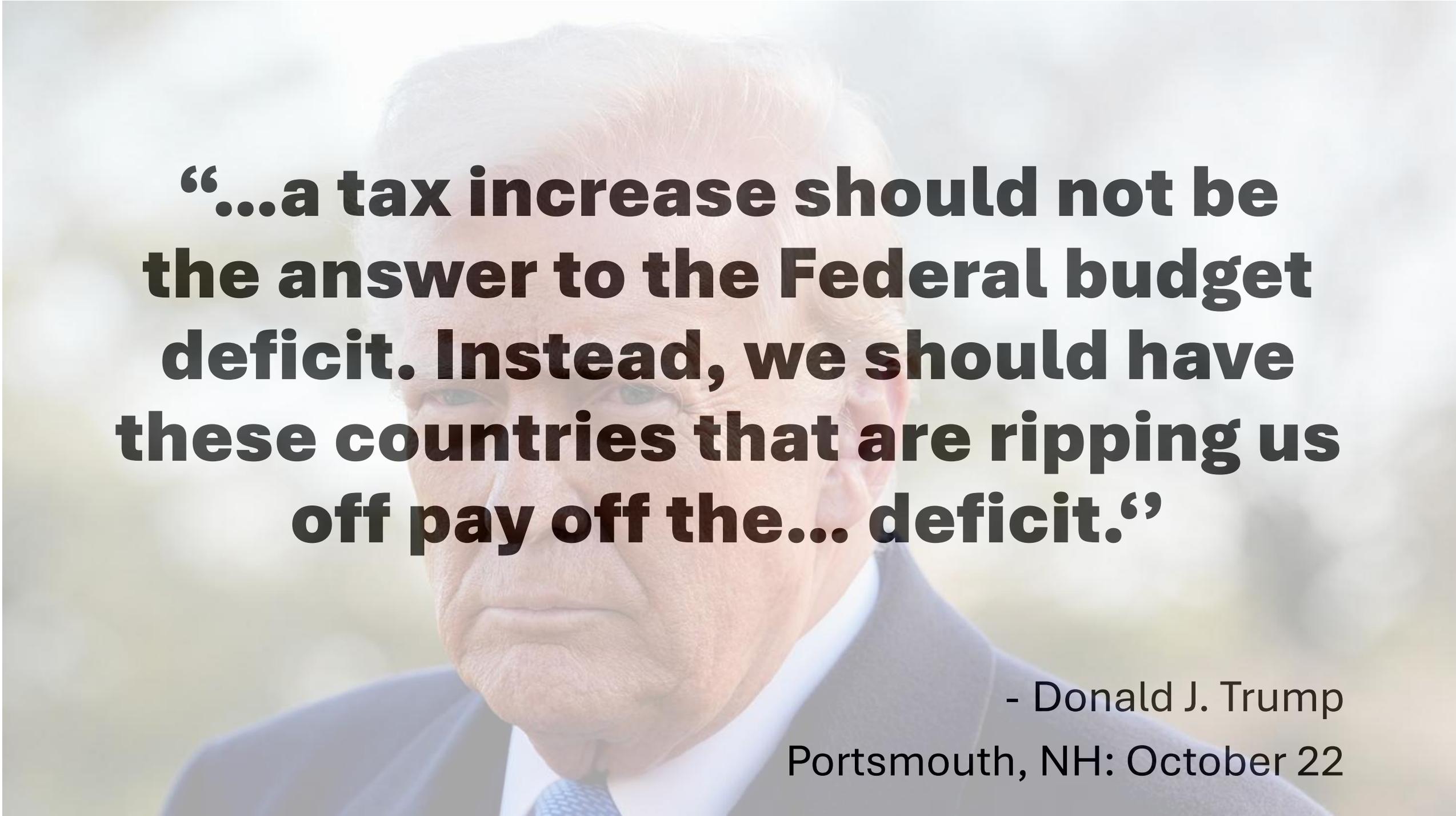
3 BLOCKS
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UNCONSTITUTIONAL





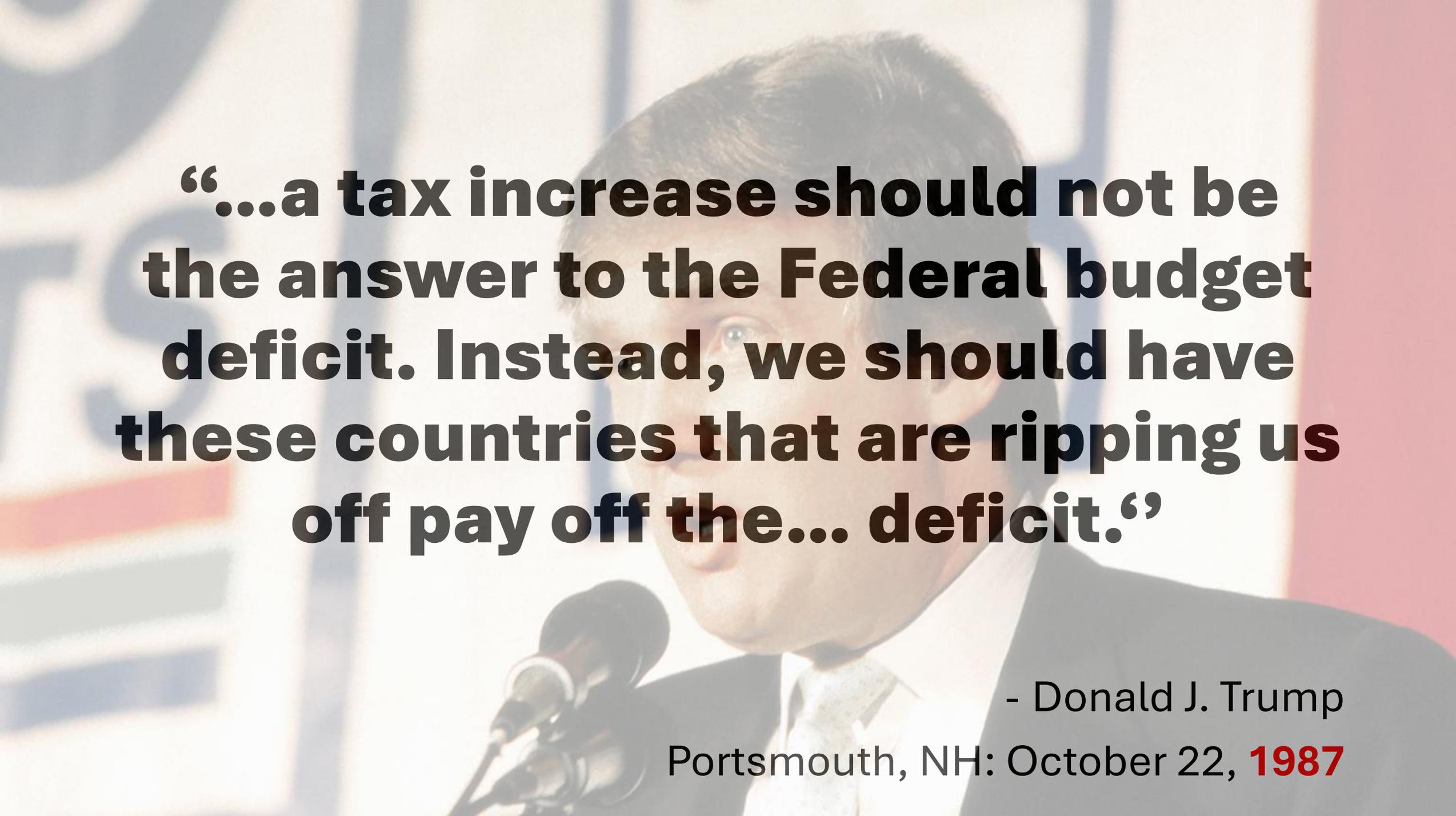
**LOOKING
AHEAD**



“...a tax increase should not be the answer to the Federal budget deficit. Instead, we should have these countries that are ripping us off pay off the... deficit.”

- Donald J. Trump

Portsmouth, NH: October 22



“...a tax increase should not be the answer to the Federal budget deficit. Instead, we should have these countries that are ripping us off pay off the... deficit.”

- Donald J. Trump

Portsmouth, NH: October 22, **1987**



Sec. 232 (national security); *open investigations into copper, lumber, pharma, semiconductors, critical minerals, trucks/parts, aircraft / jet engines*



Sec. 301 (unfair trade practices); *original China tariffs from 2018-19 upheld & expanded by Biden*



Sec. 122 (balance of payments authority); *up to 15% for 150 days, no prior investigation needed*



Sec. 338 (response to foreign discrimination); *up to 50% on any country that discriminates vs US products*



Sec. 201 (imports threaten domestic industry)



Sec. 891 (retaliatory tax); *can double certain U.S. tax rates if POTUS finds foreign country's taxes discriminate vs U.S. citizens or corporations*



EXHIBITIONS &
CONFERENCES
ALLIANCE



A close-up photograph of a globe showing the North Atlantic Ocean and parts of North and South America. A dark, rectangular wooden sign with the word "TRAVEL" in white, distressed, block letters is placed horizontally across the center of the globe. The globe's map is detailed, showing country names like Mexico, USA, Canada, and South American nations like Peru, Chile, Argentina, and Uruguay. Major cities such as New York, Washington, DC, Havana, and São Paulo are also visible. The background is a soft, out-of-focus brownish-orange color.

TRAVEL



NOV 30 2010

U.S. BORDER PROTECTION
5885

VISA

THE UNITED STATES OF AMERICA

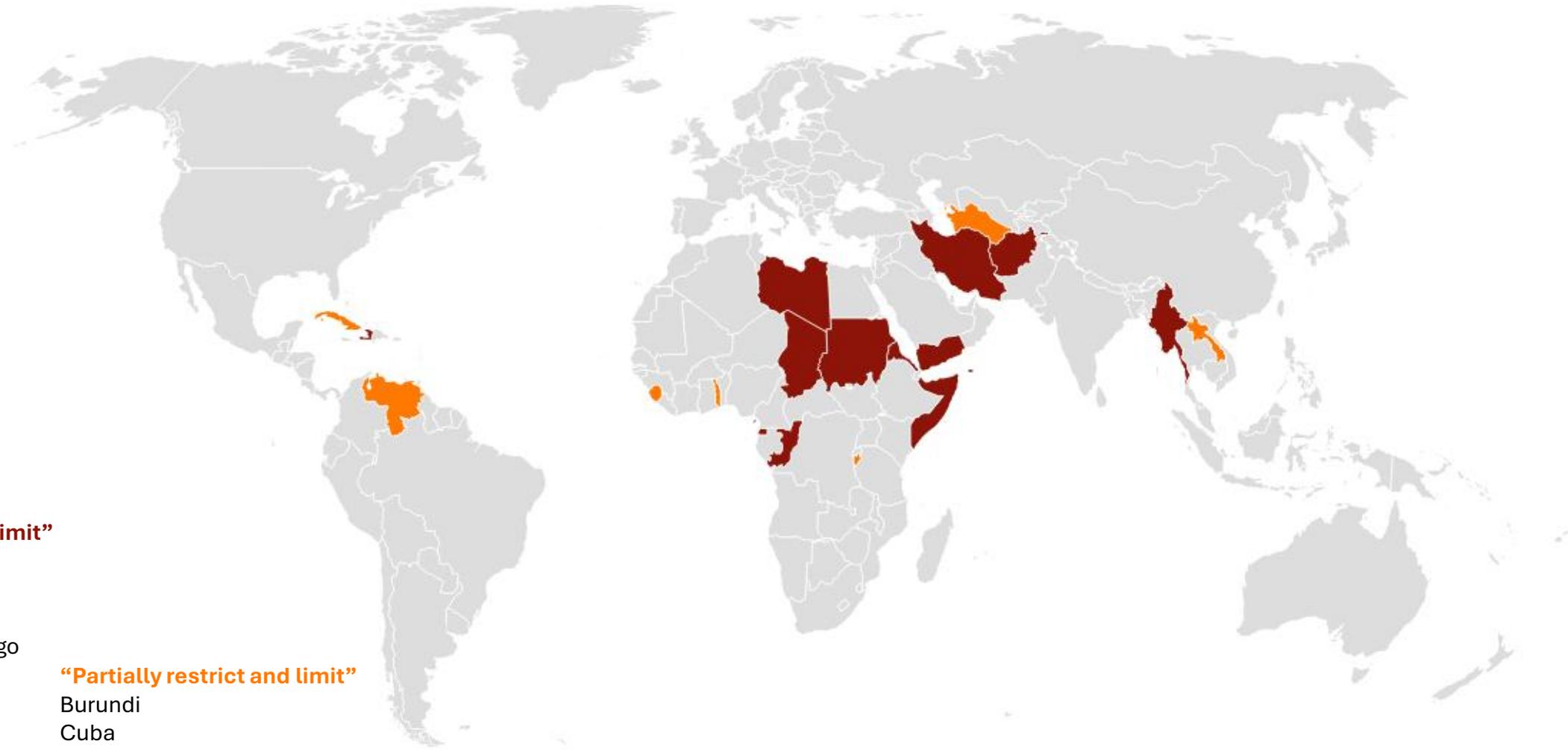
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UNIFIED
ADVISE



**WHAT'S
NEW**





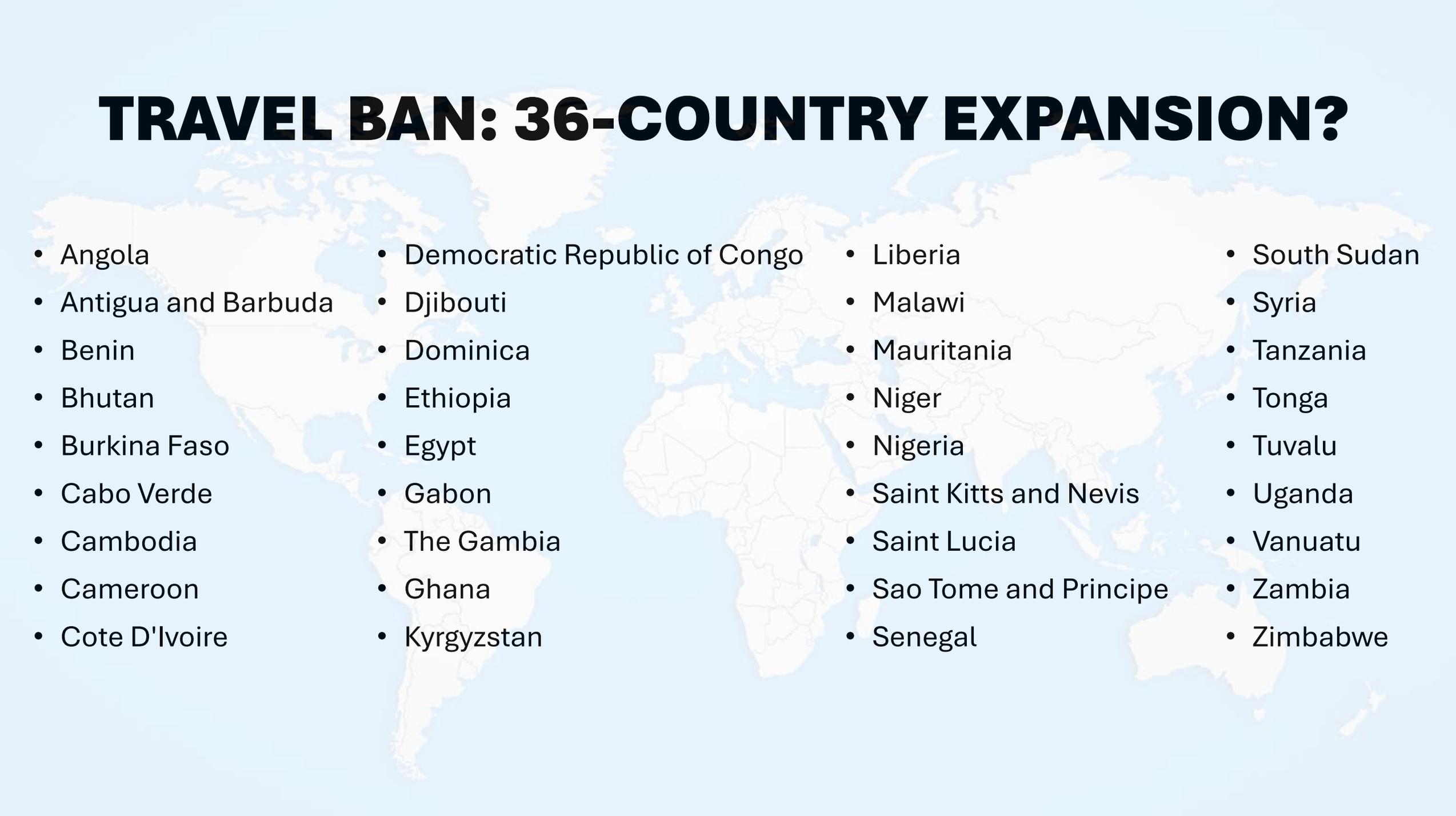
“Fully restrict and limit”

- Afghanistan
- Burma
- Chad
- Republic of the Congo
- Equatorial Guinea
- Eritrea
- Haiti
- Iran
- Libya
- Somalia
- Sudan
- Yemen

“Partially restrict and limit”

- Burundi
- Cuba
- Laos
- Sierra Leone
- Togo
- Turkmenistan
- Venezuela

TRAVEL BAN: 36-COUNTRY EXPANSION?

- 
- Angola
 - Antigua and Barbuda
 - Benin
 - Bhutan
 - Burkina Faso
 - Cabo Verde
 - Cambodia
 - Cameroon
 - Cote D'Ivoire
 - Democratic Republic of Congo
 - Djibouti
 - Dominica
 - Ethiopia
 - Egypt
 - Gabon
 - The Gambia
 - Ghana
 - Kyrgyzstan
 - Liberia
 - Malawi
 - Mauritania
 - Niger
 - Nigeria
 - Saint Kitts and Nevis
 - Saint Lucia
 - Sao Tome and Principe
 - Senegal
 - South Sudan
 - Syria
 - Tanzania
 - Tonga
 - Tuvalu
 - Uganda
 - Vanuatu
 - Zambia
 - Zimbabwe





U.S. Citizenship and Immigration Services

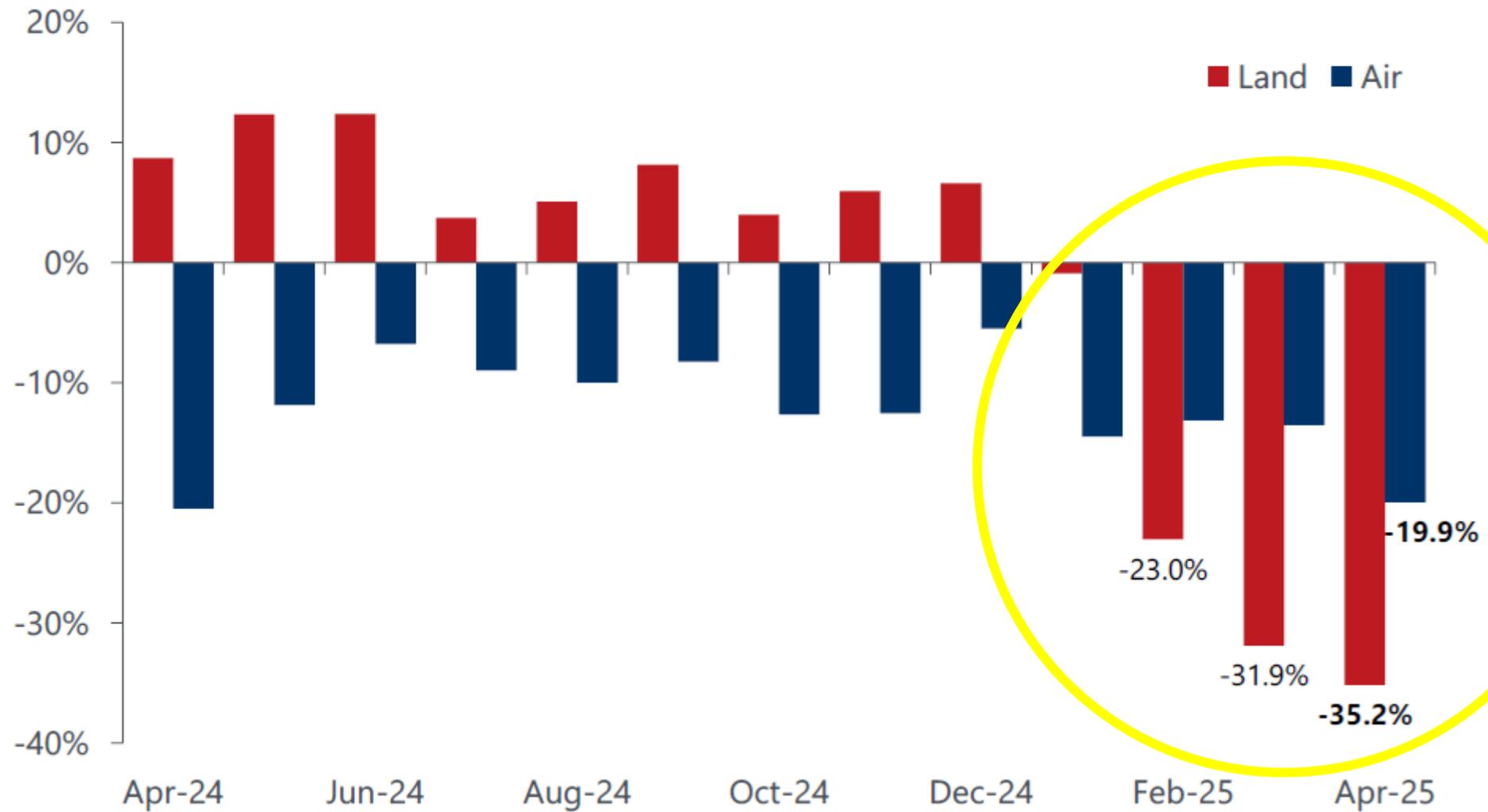


Sorry
WE'RE
CLOSED

What is your company's expectation for business travel spend in 2025 vs. 2024	Response Date: Jan/Feb 2025	Response Date: April 2025
Up more than 10%	23%	24%
Up less than 10%	30%	19%
About the same	30%	27%
Down less than 10%	11%	5%
Down more than 10%	5%	25%

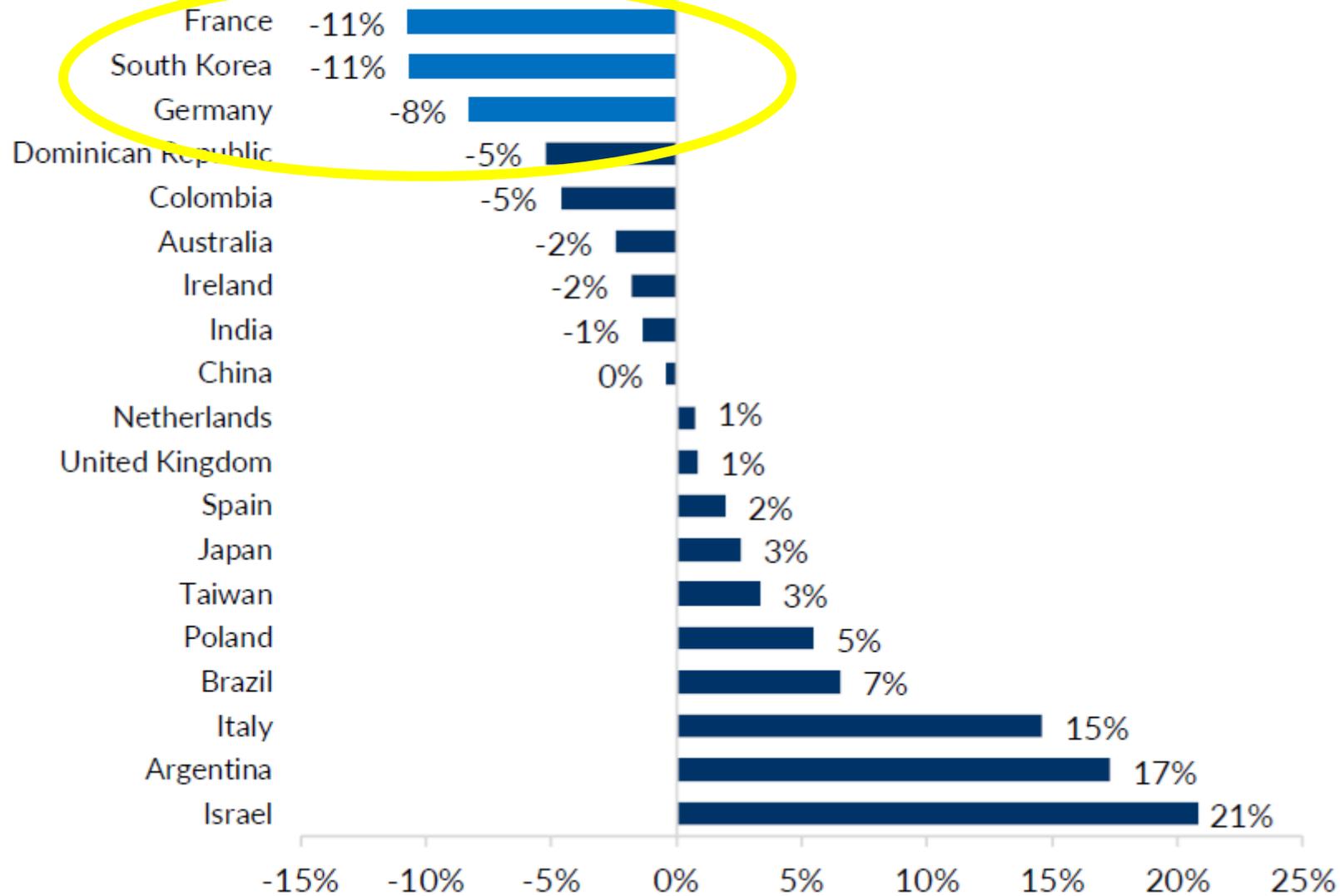
Canadian-resident US return trips

Year-over-year change



Arrivals to the US by Country (March+April 2025)

% change year-over-year

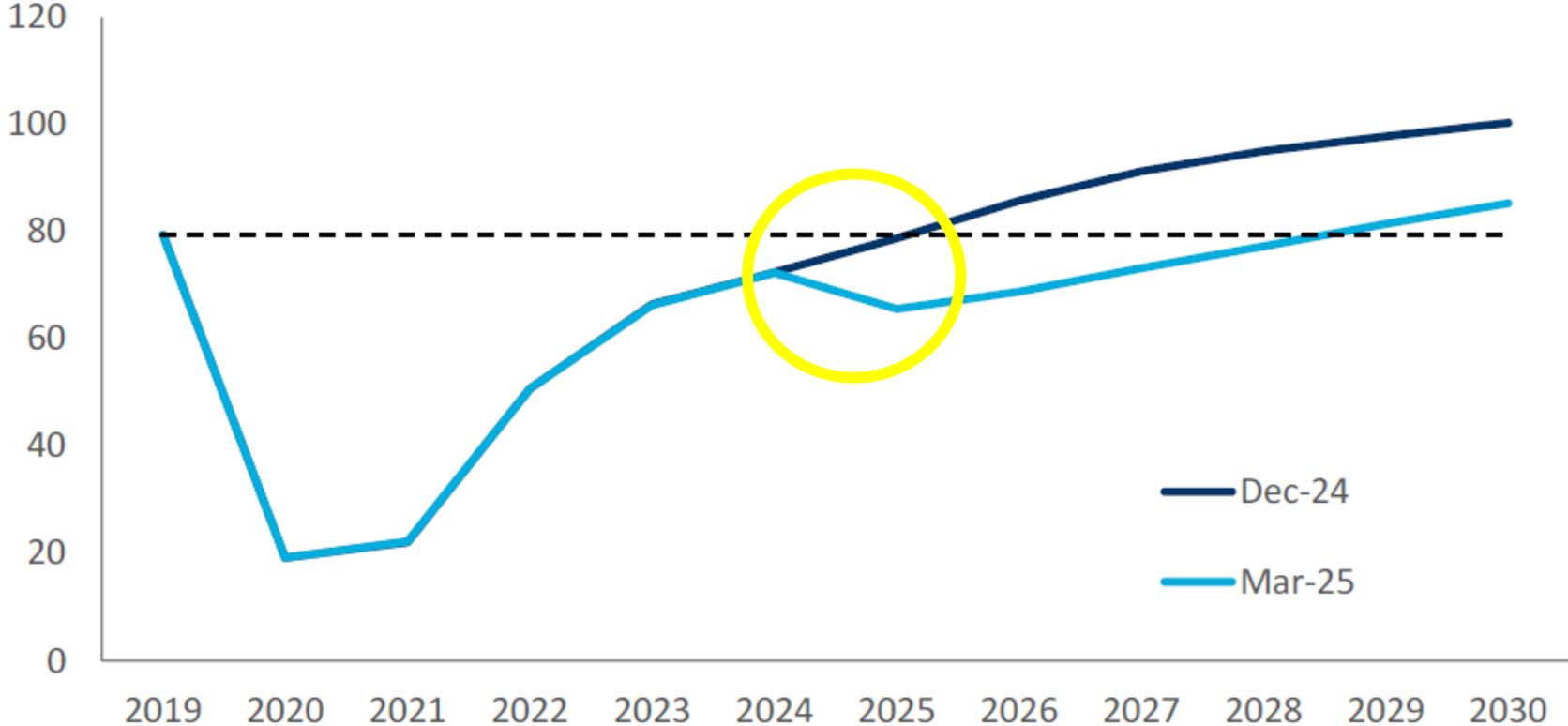


Source: U.S. National Travel & Tourism Office

US inbound arrivals set to fall 9% in 2025

US inbound arrivals

Visits, mns



Recovery delayed to 2029

2 LONG-TERM



1 MEDIUM-TERM



0 SHORT-TERM



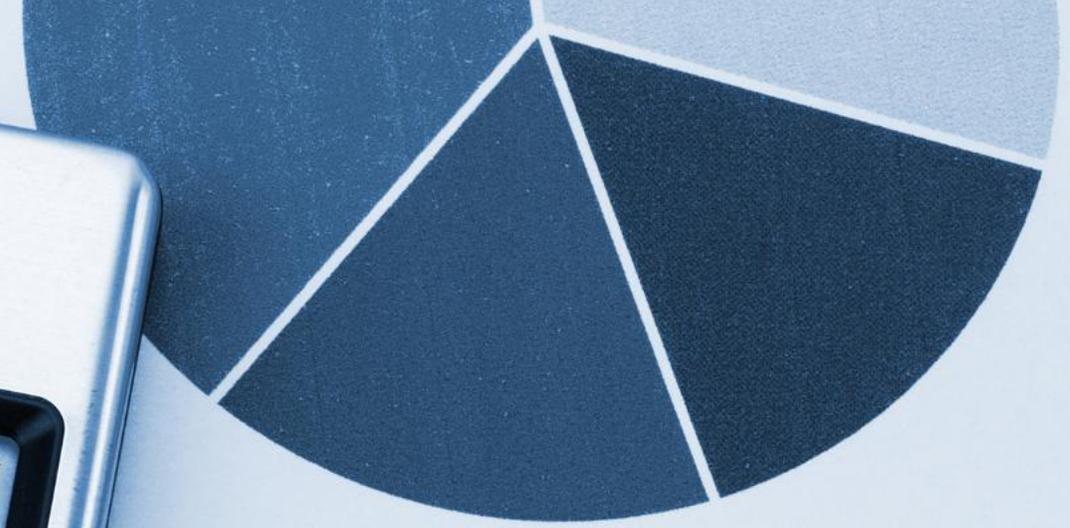
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ECA 2025 TAX REFORM AGENDA



- **Pro-growth:** Maintain competitive business/entrepreneur tax rate
- **Pro-investment:** Maintain tax treatment of private investment
- **Pro-impact:** Maintain the tax-exempt status of nonprofit associations and their events
- **Pro-workforce development:** Expand 529 college savings plans into *career* savings plans





WORKFORCE

ECA'S 2025 FUTURE WORKFORCE AGENDA

- **Expand Section 529 college savings** plans into *career* savings plans by covering certain licenses and certifications
- **Expand the Pell Grant program** to pay for high-quality, shorter-term job training programs for the first time



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Tax Reform

HOUSE OF REPRESENTATIVES TAX REFORM

- ✓ • **Pro-growth:** Maintain competitive business/entrepreneur tax rate
- ✓ • **Pro-investment:** Maintain tax treatment of private investment
- ✓ • **Pro-impact:** Maintain the tax-exempt status of nonprofit associations and their events
- ✓ • **Pro-workforce development:** Expand 529 college savings plans into career savings plans



HOUSE OF REPRESENTATIVES TAX REFORM

- ✔ • **Pro-growth:** Maintain competitive business/entrepreneur tax rate
- ✔ • **Pro-investment:** Maintain tax treatment of private investment
- ✔ • **Pro-impact:** Maintain the tax-exempt status of nonprofit associations and their events
- ✔ • **Pro-workforce development:** Expand 529 college savings plans into career savings plans



- **Pell Grant expansion:** Expand Pell Grant to cover skilled workforce training



SENATE TAX REFORM (PROPOSED)

- ✓ • **Pro-growth:** Maintain competitive business/entrepreneur tax rate
- ✓ • **Pro-investment:** Maintain tax treatment of private investment
- ✓ • **Pro-impact:** Maintain the tax-exempt status of nonprofit associations and their events
- ✓ • **Pro-workforce development:** Expand 529 college savings plans into career savings plans



SENATE TAX REFORM (PROPOSED)

- ✓ • **Pro-growth:** Maintain competitive business/entrepreneur tax rate
- ✓ • **Pro-investment:** Maintain tax treatment of private investment
- ✓ • **Pro-impact:** Maintain the tax-exempt status of nonprofit associations and their events
- ✓ • **Pro-workforce development:** Expand 529 college savings plans into career savings plans
- ? • **Pell Grant expansion:** Expand Pell Grant to cover skilled workforce training









CALIFORNIA FORKLIFT RULE

- ***WPGA v. CARB* lawsuit settlement (effective May 27, 2025):**
 - CARB *must* get federal (EPA) authorization before enforcement
 - **Not enforceable until at least 2029**
 - **Customers can still buy, lease, and rent propane-powered forklifts** (rule would have banned as of January 1, 2026)
 - **2028-2035 propane-powered forklift phase out delayed**
 - When CARB seeks EPA authorization, it *must* consider adjusting deadlines so that customers are “not unfairly deprived of the useful life of model year 2025 or later forklifts”
 - CARB criticized for its stakeholder input process 😊

SUMMARY



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WASHINGTON, DC DECODED SUMMARY

- **Tariffs:** Variability slightly more likely than not to decrease in coming months; stakeholders should have longer to prepare going forward
- **Travel:** International inbound travel down marginally; still a large international exhibitor and attendee audience at US shows
- **Taxes:** Pro-growth tax reform nearing the finish line on Capitol Hill; strong investment climate in US going forward
- **Talent:** US government getting involved; goal: more talent, reduced costs in future



GET INVOLVED



**EXHIBITIONS &
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ADVOCACY NETWORK



ECA
LEGISLATIVE
ACTION DAY
MAY 29, 2025 | WASHINGTON, DC





ECA LEGISLATIVE ACTION DAY

MAY 28, 2026 | WASHINGTON, DC



DECODING WASHINGTON, DC



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