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United States

Tourism in the economy

Travel and tourism in the United States is a major contributor to the US economy, accounting for 2.8% of GDP. Travel- and tourism-related exports accounted for 25.5% of all US services exports and 7% of all goods and services exports in 2012.

According to the US Travel and Tourism Satellite Accounts (TTSA), the industry produced nearly USD 1.5 trillion in total economic output in 2012 (USD 865 billion of direct tourism output plus USD 591 billion of indirect tourism output by ancillary industries).

The travel and tourism industry is one of America's largest employers, supporting more than 7.8 million jobs in 2012, of which 1.2 million were supported by travel- and tourism-related exports.

The United States welcomed 67 million international visitors in 2012, an increase of 6.8% over 2011. The largest source markets are Canada and Mexico (accounting for 34% and 21% of total arrivals, respectively), followed by the United Kingdom, Japan and Germany.

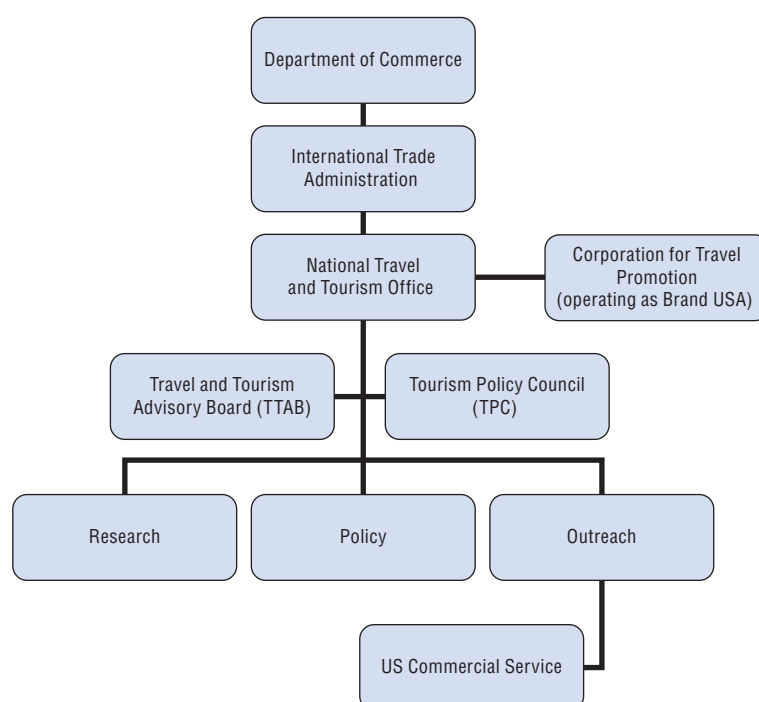
International visitors collectively spent USD 165.6 billion on travel to, and tourism-related activities within, the United States in 2012 – an increase of nearly 9% over the previous year. In order of contribution (spending in USD), the top international markets for US travel and tourism-related exports are Canada, Japan, the United Kingdom, Mexico and Brazil.

Tourism organisation and governance

The United States is highly decentralised with respect to travel and tourism. Public authorities manage travel and tourism at the national, regional, state and local levels. These include the federal government, state governments and destination marketing organisations (DMOs). At the federal level, the National Travel and Tourism Office (NTTO), within the International Trade Administration of the US Department of Commerce, serves as the central point of contact within the federal government and represents the United States in inter-governmental forums, including OECD and APEC. NTTO is the source of official tourism statistics and works to enhance the competitive position of the United States with respect to travel and tourism (Figure 1).

The Corporation for Travel Promotion (CTP), operating as Brand USA, is a non-profit corporation that promotes travel to the United States and works with the US government to communicate and improve the entry process for international visitors.

The federal government does not regulate travel and tourism as a distinct industry. However, some sectors, such as transport, are regulated at the federal level. States and local government may regulate the conduct of travel and tourism business within their

Figure 1. **United States: Organisational chart of tourism bodies**

Source: OECD, adapted from the US Department of Commerce, 2014.

jurisdictions. At the federal level, therefore, the Department of Commerce serves as a facilitator between the private sector and other federal agencies for policy co-ordination with respect to travel and tourism issues.

The process of policy deliberation at the Department of Commerce includes the US Travel and Tourism Advisory Board (TTAB) and the Tourism Policy Council (TPC). The TTAB consists of private-sector representatives from companies and organisations in the travel and tourism industry, which are appointed to provide policy input to the Secretary of Commerce.

The TPC is an inter-agency committee established by law for the purpose of ensuring that the nation's tourism interests are considered in federal decision-making. Its major function is to co-ordinate national policies and programmes relating to international travel and tourism, recreation and national heritage resources that involve federal agencies. The TPC reviews and responds to TTAB recommendations and provides additional insight from the public sector perspective on issues affecting travel and tourism nationally.

Tourism budgets

NTTO obtains its funds from a congressional appropriation to the Department of Commerce, which then allocates resources to NTTO. In addition, NTTO sells research reports and data to generate additional operating revenues, along with inter-agency agreements that also generate funds. NTTO's operational budget for fiscal 2011/12* was approximately USD 3.7 million from all sources.

* The United States' fiscal year starts on 1 October and ends on 30 September.

The CTP will be supported through the end of fiscal 2014/15 by a portion of the fees (USD 10 out of a total fee of USD 14) charged for the Electronic System for Travel Authorisation (ESTA), paid by international travellers coming to the United States from countries participating in the Visa Waiver Programme. Up to USD 100 million will be made available each year to the CTP from the ESTA fees based on the required matching funds. After fiscal 2014/15, the CTP will not be eligible to receive its portion of the ESTA fee unless it is re-authorised to do so by the US Congress.

Tourism-related policies and programmes

In January 2012, President Obama issued an Executive Order on travel and tourism that called for a Task Force on Travel and Competitiveness, chaired by the Secretary of Commerce and the Secretary of the Interior, and charged the task force with developing a National Travel and Tourism Strategy to be implemented through the Tourism Policy Council. The National Strategy sets an ambitious but achievable goal of increasing American jobs by attracting 100 million international visitors, who are expected to spend an estimated USD 250 billion annually, by the end of 2021. The strategy also encourages Americans to travel within the United States and its territories to see all that the country has to offer. To meet these goals, and to ensure that the United States is creating conditions for growth, the task force identified five key areas for the United States to address:

- Promoting the United States as never before.
- Enabling and enhancing travel and tourism to and within the United States.
- Providing a world-class customer service and visitor experience.
- Co-ordinating across government.
- Conducting research and measuring results.

The 6% increase in international visitors achieved in 2012 is above the average 5% compounded annual growth rate needed to meet the National Strategy's goal of welcoming 100 million visitors by 2021.

The aim of the Travel Promotion Act of 2009 is to increase international travel to the United States by improving the country's image around the world, thereby creating jobs and stimulating economic growth. The law established the Corporation for Travel Promotion, to communicate US entry policies and otherwise promote leisure, business and scholarly travel to the United States. The corporation is now doing business as Brand USA.

Brand USA is working closely with federal government partners on the communication of US visa and entry policy, as well as on the implementation of the National Travel and Tourism Strategy.

During fiscal 2011/12, the Department of State issued almost 9 million visas to qualified applicants around the world. The Department of State is working to meet the demand for visas by streamlining operations and increasing capacity, although there remain challenges in meeting demand in key markets, particularly during times of peak travel such as the summer months.

To meet growing customer demand, the Department of Homeland Security (DHS) has had programmes in place since 2006 to improve the customer service experience, including the Model Ports programme, established in 20 airports across the country. A collaborative effort among DHS and public and private sector partners produced an array of programme initiatives, such as enhancing the queuing area of primary entry, improved signage that is

easily understood by international travellers, wait-time monitoring and reporting. In addition, the Global Entry programme allows faster clearance for pre-approved, low-risk travellers on arrival, allowing resources to be redeployed to reduce waiting times at the border. TSA Pre✓™ allows selected frequent flyers and members of US Customs and Border Protection (CBP) Trusted Traveler programmes to receive expedited screening benefits.

As part of President Obama's Executive Order on travel and tourism that created the National Travel and Tourism Strategy, the President directed federal agencies to aggressively expand the nation's ability to attract and welcome visitors while maintaining the highest standards of security:

- New visa adjudicator positions in China and Brazil and new and expanded visa processing facilities mean that more than 90% of applicants worldwide are interviewed within three weeks of submitting their applications.
- Chinese Taipei was designated for the Visa Waiver Program on 2 October 2012.
- More than 1.7 million people, including over 400 000 new members in fiscal 2011/12, have access to Trusted Traveler programmes and over 7.6 million passengers received TSA Pre✓™ expedited screening.
- Federal agencies have increased their focus on customer service, more efficient processing, and better outreach materials.

Statistics and evaluation of economic impact

NTTO manages the Travel and Tourism Statistical System for the United States. The system provides national and local level data that tracks past performance, provides insights into the future, and offers key traveller characteristics data to guide marketing campaigns. Specific programmes of the system include, but are not limited to:

- *Travel and Tourism Satellite Accounts*, an economic tool that accurately measures the impact of travel and tourism industries on the US economy, providing industry comparability and job generation based on the government's national accounts system.
- *International Arrivals Database* from the Department of Homeland Security, which measures overseas travellers to the United States (excluding Canada and Mexico) by country, port of entry, type of visa and mode of transport.
- *Survey of International Air Travellers (In-Flight Survey)*, a primary research programme that collects more than 30 key characteristics on international travellers to and from the United States. The programme provides the only comprehensive, comparable estimates of the states and cities visited by overseas travellers, as well as international destinations visited by US residents.
- *International Travel Receipts and Payments Data*, which provide the sole source of data for the Bureau of Economic Analysis to develop estimates of travel and passenger fare exports and imports for the United States for more than 30 countries.
- *International Air Traffic Database*, which reports monthly data based on the US Department of Homeland Security Advanced Passenger Information System (APIS) (formerly I-92) arrival/departure records, providing total non-stop air traffic arrivals and departures to and from the United States.
- *Canadian Travel to the US* programme that provides monthly arrivals from Canada and, on an annual basis, over a dozen traveller characteristics of Canadian visitors to the top 20 US states.

- *International Travel Forecast* programme, providing volumes and rates of change for all world regions and the top 40 visitor markets to the United States. The forecast is issued twice yearly and is a consensus-built estimate based on a review of key economic and other variables that impact travel to the United States.

Statistical profile

Table 1. **United States: Domestic tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|---------------------------------------|----------|-----------|-----------|-----------|-----------|-----------|
| Total domestic trips | | .. | .. | .. | .. | .. |
| Overnight visitors (tourists) | Thousand | 1 071 260 | 1 008 198 | 1 049 470 | 1 075 880 | 1 123 700 |
| Same-day visitors (excursionists) | | .. | .. | .. | .. | .. |
| <i>Trips by main purpose of visit</i> | | | | | | |
| Business and professional | | .. | .. | .. | .. | .. |
| Holiday, leisure and recreation | | .. | .. | .. | .. | .. |
| Nights in all means of accommodation | | .. | .. | .. | .. | .. |
| Hotels and similar establishments | | .. | .. | .. | .. | .. |
| Other collective establishments | | .. | .. | .. | .. | .. |
| Domestic travel receipts | | .. | .. | .. | .. | .. |

Source: Longwoods International, Inc. Travel USA®, February 2013.


StatLink  <http://dx.doi.org/10.1787/888932989722>

Table 2. **United States: Inbound tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|-------------|---------|---------|---------|---------|---------|
| Total international arrivals | Thousand | 175 632 | 160 359 | 162 269 | 164 672 | 171 630 |
| Overnight visitors (tourists) | Thousand | 57 942 | 54 958 | 60 008 | 62 711 | 66 969 |
| Same-day visitors (excursionists) ¹ | Thousand | 117 690 | 105 401 | 102 261 | 101 961 | 104 661 |
| <i>Top markets</i> | | | | | | |
| Canada | Thousand | 18 915 | 17 973 | 20 176 | 21 337 | 22 699 |
| Mexico | Thousand | 13 686 | 13 229 | 13 469 | 13 491 | 14 509 |
| United Kingdom | Thousand | 4 565 | 3 899 | 3 851 | 3 835 | 3 763 |
| Japan | Thousand | 3 250 | 2 918 | 3 386 | 3 250 | 3 698 |
| Germany | Thousand | 1 782 | 1 687 | 1 726 | 1 824 | 1 876 |
| Nights in all means of accommodation | | .. | .. | .. | .. | .. |
| Hotels and similar establishments | | .. | .. | .. | .. | .. |
| Other collective establishments | | .. | .. | .. | .. | .. |
| Total international receipts | Million USD | 141 380 | 120 290 | 134 450 | 152 315 | 165 574 |
| International travel receipts | Million USD | 110 423 | 94 187 | 103 463 | 115 552 | 126 214 |
| International passenger transport receipts | Million USD | 30 957 | 26 103 | 30 987 | 36 763 | 39 360 |

1. From Mexico and Canada.

Source: US Department of Commerce, Office of Travel and Tourism Industries, Statistics Canada, Bank of Mexico, US Department of Commerce, Bureau of Economic Analysis.


StatLink  <http://dx.doi.org/10.1787/888932989741>

Table 3. **United States: Outbound tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|-------------|---------|--------|---------|---------|---------|
| Total international departures | | .. | .. | .. | .. | .. |
| Overnight visitors (tourists) | Thousand | 63 563 | 61 419 | 60 271 | 58 702 | 60 723 |
| Same-day visitors (excursionists) | | .. | .. | .. | .. | .. |
| Total international expenditure ¹ | Million USD | 112 335 | 99 249 | 102 761 | 109 308 | 118 105 |
| International travel expenditure ¹ | Million USD | 80 494 | 74 132 | 75 505 | 78 229 | 83 451 |
| International passenger transport expenditure ¹ | Million USD | 31 841 | 25 117 | 27 256 | 31 079 | 34 654 |

1. Includes overnight and same-day visitor expenditure.

Source: US Department of Commerce, Office of Travel and Tourism Industries, Statistics Canada, Bank of Mexico, US Department of Commerce, Bureau of Economic Analysis.


StatLink  <http://dx.doi.org/10.1787/888932989760>

Table 4. United States: Enterprises in tourism
Number of establishments

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---------|---------|---------|---------|---------|
| Total tourism enterprises | 714 516 | 714 985 | 721 500 | 731 689 | 746 220 |
| Tourism industries | .. | .. | .. | .. | .. |
| Accommodation services for visitors | 55 523 | 55 777 | 56 088 | 56 422 | 56 815 |
| Hotels and similar establishments | .. | .. | .. | .. | .. |
| Food and beverage serving industry | 545 678 | 548 246 | 555 933 | 565 632 | 578 003 |
| Passenger transport | .. | .. | .. | .. | .. |
| Air passenger transport | 6 363 | 6 254 | 6 090 | 5 995 | 5 819 |
| Railways passenger transport | .. | .. | .. | .. | .. |
| Road passenger transport | .. | .. | .. | .. | .. |
| Water passenger transport | .. | .. | .. | .. | .. |
| Passenger transport supporting services | .. | .. | .. | .. | .. |
| Transport equipment rental ¹ | 8 180 | 7 877 | 7 568 | 7 854 | 8 752 |
| Travel agencies and other reservation services industry | 19 942 | 18 832 | 18 056 | 17 668 | 17 573 |
| Cultural industry ² | 5 618 | 5 623 | 5 671 | 5 770 | 5 902 |
| Sports and recreation industry ³ | 72 199 | 71 361 | 71 112 | 71 371 | 72 366 |
| Retail trade of country-specific tourism characteristic goods | .. | .. | .. | .. | .. |
| Other country-specific tourism industries | 1 013 | 1 015 | 982 | 977 | 990 |
| Other industries | .. | .. | .. | .. | .. |

1. Car rental.

2. Includes museums, historical sites, zoos and parks.

3. Amusements, gambling and recreation.

Source: US Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.


StatLink  <http://dx.doi.org/10.1787/888932989779>

Table 5. United States: Employment in tourism
Thousand employees

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|-------|-------|-------|-------|-------|
| Total tourism employment (direct) | 5 825 | 5 340 | 5 285 | 5 443 | 5 590 |
| Tourism industries | .. | .. | .. | .. | .. |
| Accommodation services for visitors | 1 381 | 1 285 | 1 303 | 1 344 | 1 370 |
| Hotels and similar establishments | .. | .. | .. | .. | .. |
| Food and beverage serving industry | 1 888 | 1 684 | 1 729 | 1 781 | 1 846 |
| Passenger transport | 1 146 | 1 071 | 1 041 | 1 061 | 1 079 |
| Air passenger transport | 482 | 457 | 451 | 459 | 462 |
| Railways passenger transport | .. | .. | .. | .. | .. |
| Road passenger transport | .. | .. | .. | .. | .. |
| Water passenger transport | .. | .. | .. | .. | .. |
| Passenger transport supporting services | .. | .. | .. | .. | .. |
| Transport equipment rental | .. | .. | .. | .. | .. |
| Travel agencies and other reservation services industry | .. | .. | .. | .. | .. |
| Cultural industry | .. | .. | .. | .. | .. |
| Sports and recreation industry ¹ | 609 | 547 | 534 | 551 | 568 |
| Retail trade of country-specific tourism characteristic goods ² | 561 | 521 | 469 | 478 | 487 |
| Other country-specific tourism industries | .. | .. | .. | .. | .. |
| Other industries | 241 | 233 | 208 | 229 | 240 |
| <i>Gender breakdown</i> | | | | | |
| Male (% of total tourism employment) | .. | .. | .. | .. | .. |
| Female (% of total tourism employment) | .. | .. | .. | .. | .. |

Note: All data reflect a Bureau of Economic Analysis national income and product accounts benchmark revision (June 2013).

1. Recreation and other entertainment services.

2. Shopping.

Source: US Department of Commerce, Bureau of Economic Analysis, US Travel and Tourism Satellite Account (TTSA).

StatLink  <http://dx.doi.org/10.1787/888932989798>


Table 6. **United States: Internal tourism consumption**

Million USD, 2011

| | Domestic tourism consumption | Inbound tourism consumption | Internal tourism consumption |
|--|------------------------------|-----------------------------|------------------------------|
| Total | 720 841 | 151 525 | 872 366 |
| Consumption products | .. | .. | .. |
| Tourism characteristic products | .. | .. | .. |
| Accommodation services for visitors | 129 112 | 33 207 | 162 319 |
| Food and beverage serving services | 101 694 | 25 573 | 127 267 |
| Passenger transport services | .. | .. | .. |
| Air passenger transport services ¹ | 120 121 | 44 599 | 164 720 |
| Railways passenger transport services | 1 334 | 147 | 1 481 |
| Road passenger transport services ² | 15 067 | 1 847 | 16 914 |
| Water passenger transport services | 9 293 | 0 | 9 293 |
| Passenger transport supporting services ³ | 8 394 | 1 138 | 9 532 |
| Transport equipment rental services ⁴ | 33 165 | 671 | 33 836 |
| Travel agencies and other reservation services | 38 171 | 1 741 | 39 912 |
| Cultural services ⁵ | 13 119 | 1 309 | 14 428 |
| Sports and recreation services ⁶ | 59 268 | 11 656 | 70 924 |
| Country-specific tourism characteristic goods | .. | .. | .. |
| Country-specific tourism characteristic services | .. | .. | .. |
| Other consumption products ⁷ | 192 102 | 29 637 | 221 739 |
| Tourism connected products | .. | .. | .. |
| Non-tourism related consumption products | .. | .. | .. |
| Non-consumption products | .. | .. | .. |

1. Includes domestic and international air passenger transport services.
2. Includes interurban bus transportation and charter bus transportation, urban transit systems, taxi service, scenic and sightseeing transportation services, parking lots and garages, highway tolls.
3. Automotive repair services.
4. Automotive and other vehicle rental.
5. Motion pictures and performing arts.
6. Includes spectator and participants sports, gambling and all other recreation and entertainment.
7. Includes gasoline, non-durable personal consumption expenditure (PCE) commodities other than gasoline as well as all other commodities.


Source: US Department of Commerce, Bureau of Economic Analysis, US Travel and Tourism Satellite Account (TTSA).

StatLink  <http://dx.doi.org/10.1787/888932989817>Table 7. **United States: Key economic indicators**

Percentage

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|------|------|------|------|------|
| Tourism GDP (direct) as % of total GDP | 2.6 | 2.7 | 2.8 | 2.7 | 2.8 |
| Total tourism employment (direct) as % of total employment | .. | .. | .. | .. | .. |

Source: US Department of Commerce, Bureau of Economic Analysis, US Travel and Tourism Satellite Account (TTSA).

StatLink  <http://dx.doi.org/10.1787/888932989836>

For more information

National Travel and Tourism Office
United States Statistics and Information

www.travel.trade.gov
www.export.gov

PART II

Non-member economies