

# United States

## Tourism in the economy

Travel and tourism is a major contributor to the United States economy, accounting for 2.6% of GDP. Travel and tourism-related exports accounted for 31% of all United States services exports and 9% of all United States exports in 2014.

According to the United States Travel and Tourism Satellite Accounts, the industry produced USD 1.5 trillion in total economic output in 2014 (USD 894 billion of direct tourism output plus USD 641 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 2014, of which 1.1 million were supported by travel and tourism-related exports.

The United States welcomed a record 75 million international visitors in 2014, an increase of 7.2% over 2013. The largest source markets are Canada and Mexico (accounting for 31% and 23% of total arrivals, respectively), followed by the United Kingdom, Japan and Brazil.

International visitors collectively spent USD 220.8 billion on travel to, and tourism-related activities within, the United States in 2014 – an increase of nearly 3% over the previous year. In order of contribution (spending in USD), the top international markets for United States travel and tourism-related exports are Canada, China, Mexico, Japan, the United Kingdom, and Brazil.

## Tourism governance and funding

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). The National Travel and Tourism Office (NTTO), within the International Trade Administration of the United States Department of Commerce, serves as the central point of contact within the federal government and represents the United States in inter-governmental fora, including OECD and APEC. The 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.

The Corporation for Travel Promotion (CTP), formed in 2010 and operating as Brand USA, is a non-profit corporation that promotes travel to the United States and works with the United States Government to communicate and improve the entry process for international visitors. The NTTO is the official government liaison to Brand USA.

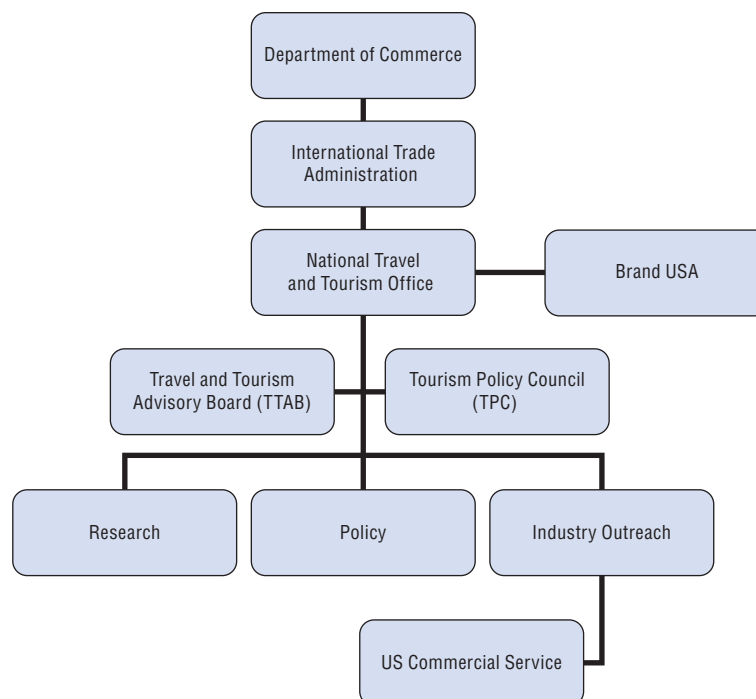
The Federal Government does not regulate travel and tourism as a distinct industry. However, some sectors, such as transport, are regulated at the federal level. States and local governments may regulate the conduct of travel and tourism business within their

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 United States Travel and Tourism Advisory Board (TTAB) and the Tourism Policy Council (TPC). The TTAB consists of 32 private-sector representatives from companies and organisations in the travel and tourism industry, who are appointed to provide policy input to the Secretary of Commerce.

The TPC is an inter-agency council 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.

### United States: Organisational chart of the tourism bodies



Source: OECD, adapted from the United States Department of Commerce, 2016.

The NTTO obtains its funds from a congressional appropriation to the Department of Commerce, which then allocates resources to NTTO. In addition, the NTTO sells research reports and data to generate additional operating revenues, along with inter-agency agreements that also generate funds. The NTTO's operational budget for 2014 was approximately USD 4.7 million from all sources.

Brand USA is supported by a portion of the fees 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 Program (VWP). Up to USD 100 million is made available each year to Brand USA to match qualified private sector contributions.

## Tourism policies and programmes

The United States travel and tourism industry is among the most competitive in the world. After many years of decline, the United States is increasing its share of long-haul travel due to several enhancements, including Brand USA marketing efforts (Box 1.11), significant improvements in visa processes and expansion of the Visa Waiver Program, and public-private partnerships aimed at improving the arrivals experience. Policy priorities for the United States continue to be related to raising its competitiveness in the global travel and tourism market, and include marketing the United States as a premier travel destination and improving the ease and perception of entry/exit processes. Brand USA is working closely with Federal Government partners on the communication of United States entry policy, as well as on the implementation of the National Travel and Tourism Strategy.

The United States continues to implement the Strategy, which sets an ambitious but achievable goal of increasing American jobs by attracting 100 million international visitors 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 United States is implementing the Strategy in five key areas:

- 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 7% increase in international visitors achieved in 2014 is above the average 5% compounded annual growth rate needed to meet the Strategy's goal of welcoming 100 million visitors by 2021.

The United States is working to ensure that government services meet demand generated by Brand USA and embassies in key markets. The Department of State is streamlining operations and expanding capacity to meet the increasing demand for visas. New visa arrangements have been put in place with a number of countries. The United States is also committed to preserving and expanding the Visa Waiver Program.

### **Extending Visa Validity between the United States and China**

In November 2014, the United States and the People's Republic of China concluded a reciprocal visa validity arrangement to strengthen the ever-broadening economic and people-to-people ties between the two countries. The National Travel and Tourism Office played a leading role in extending China visa validity by making the economic case of the importance of welcoming more Chinese visitors to the United States and the need to meet growing demand for Chinese visas to the United States. Both countries agreed to increase the validity of short-term tourist and business visas issued to each other's citizens from one to ten years – the longest validity possible under United States law – and increase the validity of student and exchange visas from one to five years. This arrangement will improve trade, investment, and business ties by facilitating travel and offering easier access to both economies. Since this policy change was implemented, Chinese demand for United States visas has grown by more than 50% compared to the same period in 2014.

In 2014, the President issued a memorandum announcing a key focus on improving the entry experience at top United States airports and calling for a new national goal to provide a best-in-class arrivals experience to an ever-increasing number of international visitors, while maintaining the highest standards of national security. To achieve this goal, a working group comprised of representatives of companies with acknowledged expertise in customer service was charged with determining the key drivers of a traveller's perception of the international arrivals experience and making recommendations to the United States Government on how best to measure those factors across the entire arrivals experience.

The Department of Homeland Security is engaging with public and private sector partners on an array of initiatives, such as leveraging new technologies to facilitate the entry process, enhancing the queuing area of primary entry, improved signage that is easily understood by international travellers, wait-time monitoring and reporting. Customs and Border Protection's Trusted Traveller programmes, which facilitate the entry process, reached record numbers of enrolment in 2014.

## Statistical profile

Table 1. United States: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	164 080	167 600	171 320	177 662	177 953
Overnight visitors (tourists)	60 010	62 821	66 657	69 995	75 011
Same-day visitors (excursionists)	104 069	104 779	104 663	107 667	102 942
<b>Top markets</b>					
Canada	20 176	21 337	22 697	23 407	23 003
Mexico	13 472	13 601	14 199	14 547	17 070
United Kingdom	3 851	3 835	3 763	3 835	4 149
Japan	3 386	3 250	3 698	3 730	3 620
Brazil	1 198	1 508	1 791	2 060	2 264
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	147 678	141 471	141 281	145 168	149 728
Overnight visitors (tourists)	61 060	59 210	60 697	61 344	68 176
Same-day visitors (excursionists)	86 618	82 261	80 584	83 824	81 552
<b>Top destinations</b>					
Mexico	20 012	20 590	20 308	20 851	25 882
Canada	11 749	11 595	11 887	11 478	11 515
United Kingdom	2 366	2 405	2 537	2 640	2 832
Dominican Republic	1 796	1 675	2 252	..	2 709
France	1 739	1 756	2 024	2 002	2 124
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	167 997	187 630	200 996	214 543	220 757
International travel receipts	137 010	150 867	161 632	172 901	177 241
International passenger transport receipts	30 987	36 763	39 364	41 642	43 516
<b>Outbound tourism</b>					
Total international expenditure	110 049	116 447	129 903	136 136	145 677
International travel expenditure	86 623	89 700	100 338	104 107	110 787
International passenger transport expenditure	23 426	26 747	29 565	32 029	34 890

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320677>


Table 2. **United States: Enterprises and employment in tourism**

	Number of establishments 2012	Number of persons employed				
		2010	2011	2012	2013	2014
<b>Total</b>	..	<b>4 925 100</b>	<b>5 107 100</b>	<b>5 175 800</b>	<b>5 393 900</b>	<b>5 491 800</b>
<b>Tourism industries</b>	<b>746 220</b>	<b>4 747 000</b>	<b>4 914 000</b>	<b>4 974 800</b>	<b>5 174 600</b>	<b>5 302 000</b>
Accommodation services for visitors	56 815	1 268 200	1 300 100	1 327 900	1 354 100	1 379 000
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	578 003	1 550 700	1 625 200	1 659 700	1 719 000	1 776 300
Passenger transport	..	995 700	1 020 100	1 030 400	1 055 200	1 060 500
Air passenger transport	5 819	424 200	436 300	439 700	445 700	450 700
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	8 752	..	..	..	..	..
Travel agencies and other reservation services industry	17 573	..	..	..	..	..
Cultural industry	5 902	..	..	..	..	..
Sports and recreation industry	72 366	504 900	520 000	527 300	556 200	572 900
Retail trade of country-specific tourism characteristic goods	..	427 500	448 600	429 500	490 100	513 300
Other country-specific tourism industries	990	..	..	..	..	..
<b>Other industries</b>	..	<b>178 100</b>	<b>193 100</b>	<b>201 000</b>	<b>219 300</b>	<b>227 100</b>

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320681>Table 3. **United States: Internal tourism consumption**


Million USD

	2012		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>697 836</b>	<b>165 780</b>	<b>863 617</b>
Tourism characteristic products	514 682	126 031	640 715
Accommodation services for visitors	110 625	35 701	146 326
Food and beverage serving services	93 131	25 520	118 651
Passenger transport services	154 540	44 940	199 480
Air passenger transport services	123 493	43 335	166 828
Railways passenger transport services	2 034	112	2 146
Road passenger transport services	17 087	935	18 022
Water passenger transport services	11 926	558	12 484
Passenger transport supporting services	10 906	838	11 744
Transport equipment rental services	31 577	301	31 879
Travel agencies and other reservation services industry	39 822	1 465	41 287
Cultural services	16 809	1 573	18 382
Sports and recreation services	57 272	15 693	72 966
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	183 154	39 749	222 902
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320693>



**From:**  
**OECD Tourism Trends and Policies 2016**

**Access the complete publication at:**  
<https://doi.org/10.1787/tour-2016-en>

**Please cite this chapter as:**

OECD (2016), "United States", in *OECD Tourism Trends and Policies 2016*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2016-41-en>

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