

# United States

## Tourism in the economy and outlook for recovery

Travel and tourism was a major contributor to the United States economy before COVID-19, directly accounting for 2.9% of total GDP and supporting 3.9% of the nation's workforce in 2019 (this increases to 6.0% of the workforce when including indirect effects). Travel and tourism was the country's third largest export, accounting for 9.4% of U.S. exports of goods and services. The impacts of the COVID-19 pandemic saw travel and tourism's share of the economy fall to 1.7% of total GDP and 2.6% of the workforce in 2020 – a loss of almost 2.2 million direct jobs.

In 2020, inbound tourism to the United States declined by 75.8% to 19.2 million visitors. International visitation increased slightly in 2021 to 22.1 million visitors. However, this remained 72% below pre-COVID-19 levels.

International tourism receipts (travel exports) declined 64.7% to USD 84.3 billion in 2020. In 2021, receipts declined an additional 1.6% to USD 82.9 billion. Mexico overtook Canada as the top source market in the United States for the first time in 2020. Mexico, Colombia, Ecuador, and Peru showed a strong rebound in 2021, with many returning to or surpassing pre-COVID levels.

The United States traditionally has a strong domestic travel market which, in 2019, accounted for 85% of travel demand in the country. Domestic travel demand fell 46% in 2020 to USD 559 billion.

Domestic travel is not expected to reach pre-pandemic levels until 2023, while domestic business travel is not expected to recover until 2025. International arrivals are expected to reach 2019 levels by 2025, according to the U.S. Travel Association.

## Tourism governance and funding

Travel and tourism in the United States is highly decentralised. 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.

The National Travel and Tourism Office (NTTO), within the International Trade Administration (ITA) of the United States Department of Commerce, is the central point of contact within the federal government. NTTO is the source of official tourism statistics and works closely with the U.S. Commercial Service at U.S. embassies to promote tourism. Brand USA is a non-profit corporation that promotes travel to the United States, working with the government to provide insights for international visitors.

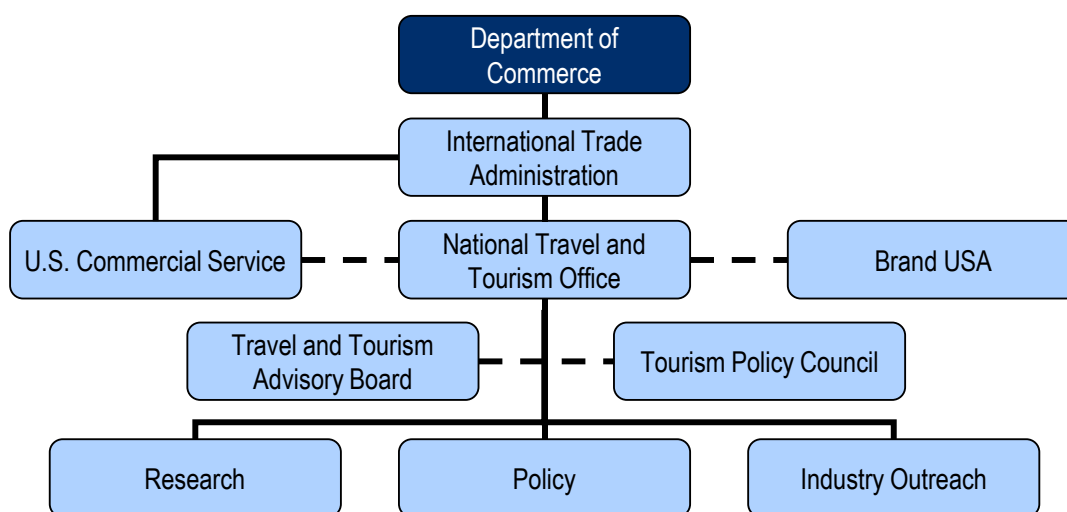
The Department of Commerce facilitates co-operation between the private sector and other federal agencies for policy co-ordination with respect to travel and tourism issues. Key travel and tourism activities at the Department of Commerce include:

- The Travel and Tourism Advisory Board (TTAB), which includes up to 32 private sector representatives appointed to provide policy advice to the Secretary of Commerce.

- The Tourism Policy Council (TPC), an inter-agency council established to co-ordinate the national policies and programmes of federal agencies that significantly affect international travel and tourism, recreation, and national heritage resources.

NTTO's operational budget for the fiscal year 2021 was approximately USD 7.7 million. The budget is supplemented by the selling of research reports and data and inter-agency agreements. Brand USA is supported by up to USD 100 million per year from the Electronic System for Travel Authorisation (ESTA) fees paid by international travellers from countries participating in the visa waiver programme and matched funds from the private sector. Brand USA funding became a significant challenge during the pandemic due to reduced international visitors from visa-waiver countries. As a result, in March 2022, the Restoring Brand USA Act provided USD 250 million in relief funding to Brand USA for the fiscal year 2022.

### United States: Organisational chart of tourism bodies



Source: OECD, adapted from the United States Department of Commerce, 2022.

### Tourism policies and programmes

The United States developed and launched a new National Travel and Tourism Strategy in 2022 (see Box 1.4). The Tourism Policy Council created the Strategy to focus the United States' efforts in support of the tourism sector, which has been deeply and disproportionately affected by the COVID-19 pandemic. The Strategy follows a four-point approach to reduce the sector's carbon footprint, create safe and secure checkpoints, and bolster tourism in underserved and underrepresented communities across the country

The new Strategy supports the current Administration's priorities of diversity, equity, and inclusion; mitigating the impacts of the climate crisis; job growth and workforce development; and building back a more sustainable and resilient sector. A key recovery priority in the United States has been to "Build Back Better", based on broad-based, equitable, community-led economic development with an emphasis on supporting SMEs and increasing resiliency to future health, environmental and other crises.

The United States passed recovery measures to support small businesses, airlines, airports, and leisure and hospitality businesses. The American Rescue Plan Act of 2021 (ARPA) provided additional relief to address the continued impact of the pandemic on the economy. The USD 1.9 trillion COVID-19 relief package includes federal support for the recovery of the travel and tourism sector.

As part of the ARPA, the Department of Commerce's Economic Development Administration's Travel, Tourism & Outdoor Recreation programme focused on accelerating the recovery of communities that rely

on the travel, tourism and outdoor recreation sectors. USD 750 million of EDA's funds were allocated to support the following efforts:

- **State Tourism Grants:** USD 510 million in non-competitive awards to help states quickly invest in marketing, infrastructure, workforce and other projects to rejuvenate safe leisure, business and international travel.
- **Competitive Grants:** USD 240 million to help communities that have been hardest hit by challenges facing the travel, tourism and outdoor recreation sectors to invest in infrastructure, workforce or other projects to support the recovery of the sector and economic resilience of the community in the future.

The funds are being used by states for state-wide or regional marketing campaigns; infrastructure upgrades to existing tourism destinations; outdoor recreation improvement projects; improving accessibility to existing tourism or outdoor recreation sites for individuals who speak other languages or have mobility restrictions; state-wide strategic travel and tourism planning; and creating or building out tourism and hospitality sector workforce development and training programmes. Overall, stimulus packages were effective in reaching the travel and tourism community and helping employees and businesses impacted.

## Statistical Profile

### United States: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	2 241 000	2 278 000	2 318 000	1 580 000	2 040 000 f
Overnight visitors (tourists)	1 591 916	1 613 987	1 646 614	1 122 368	1 449 134 f
Same-day visitors (excursionists)	649 084	664 013	671 386	457 632	590 866 f
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	1 257 616	1 286 662	1 306 439	839 532	1 157 503 p
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	174 292	169 325	165 477	53 557	46 344 p
Overnight visitors (tourists)	77 187	79 746	79 442	19 212	22 100 p
Same-day visitors (excursionists)	97 105	89 579	86 035	34 345	24 244 p
Top markets					
Mexico	17 788	18 387	18 328	7 042 e	9 700 p
Canada	20 493	21 475	20 720	4 809 e	2 331 p
Colombia	842	943	944	270	1 064 f
United Kingdom	4 483	4 659	4 780	730	461 f
India	1 285	1 378	1 474	336	433 f
Nights in all types of accommodation	404 677	405 682	411 164	95 783 p	95 783
Hotels and similar establishments	208 138	212 207	215 359	38 765 p	38 765
Other collective establishments	17 050	18 546	17 227	3 445 p	3 445
Private accommodation	179 489	174 930	178 578	53 573 p	53 573
<b>Outbound tourism</b>					
Total international departures	148 017	148 083	158 092	61 703 p	..
Overnight visitors (tourists)	87 619	93 137	99 755	33 499	49 097
Same-day visitors (excursionists)	60 398	54 946	58 336	28 203	..
Top destinations					
Mexico	35 050	36 923	39 942 p	21 729	28 789
Canada	14 242	14 440	14 994 p	1 929	2 093
Dominican Republic	2 721	2 882	2 957	1 014	..
Jamaica	1 571	1 629	1 927	640	..
United Kingdom	3 756	3 927	3 943	620	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	233 759	241 985	239 446	84 206	80 956
International travel receipts	196 469	200 724	198 982	72 481	68 759
International passenger transport receipts	37 290	41 261	40 082	11 393	12 197
<b>Outbound tourism</b>					
Total international expenditure	158 290	176 817	186 080	48 840	74 121
International travel expenditure	117 931	125 717	132 271	34 159	57 940
International passenger transport expenditure	40 359	50 678	52 795	13 032	16 181

.. Not available; e Estimated value; f Forecast value; p Provisional data; | Break in series  
Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/eh3ws4>

## United States: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
		2017	2018	2019	2020	2021
<b>Total</b>	..	<b>5 936 000</b>	<b>6 103 000</b>	<b>6 070 000</b>	<b>3 887 000 p</b>	..
<b>Tourism industries</b>	<b>912 696 p</b>	<b>5 166 000</b>	<b>5 316 000</b>	<b>5 282 000</b>	<b>3 234 000 p</b>	..
Accommodation services for visitors	67 354 p	1 516 000	1 537 000	1 565 000	1 083 000 p	..
Hotels and similar establishments	59 596 p	..	..	..	..	..
Food and beverage serving industry	666 409 p	1 720 000	1 776 000	1 701 000	878 000 p	..
Passenger transport	24 260 p	772 000	795 000	818 000	611 000 p	..
Air passenger transport	4 344 p	581 000	594 000	618 000	484 000 p	..
Railways passenger transport	..	9 000	9 000	9 000	4 000 p	..
Road passenger transport	16 988 p	141 000	154 000	147 000	95 000 p	..
Water passenger transport	2 928 p	41 000	38 000	44 000	28 000 p	..
Passenger transport supporting services	..	299 000	312 000	319 000	121 000 p	..
Transport equipment rental	15 891 p	103 000	113 000	128 000	103 000 p	..
Travel agencies and other reservation services industry	20 710 p	203 000	204 000	203 000	156 000 p	..
Cultural industry	18 221 p	48 000	48 000	43 000	38 000 p	..
Sports and recreation industry	99 851 p	505 000	531 000	505 000	244 000 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	<b>770 000</b>	<b>787 000</b>	<b>788 000</b>	<b>653 000 p</b>	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/sfnorl>

## United States: Internal tourism consumption

Million USD

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	<b>588 559</b>	<b>31 692</b>	<b>39 015 145</b>
<b>Consumption products</b>	<b>559 246</b>	<b>31 692</b>	<b>38 985 833</b>
Tourism characteristic products	473 216	26 767	2 178 332
Accommodation services for visitors	138 810	7 464	146 275
Food and beverage serving services	74 045	4 217	869 580
Passenger transport services	135 875	11 242	202 411
Air passenger transport services	113 545	11 052	124 597
Railways passenger transport services	741	0	741
Road passenger transport services	10 780	85	65 733
Water passenger transport services	10 809	105	11 340
Passenger transport supporting services	28 603	225	607 237
Transport equipment rental services	28 893	357	41 000
Travel agencies and other reservation services industry	23 016	486	23 532
Cultural services	8 826	710	47 168
Sports and recreation services	35 148	2 066	241 129
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	86 030	4 925	36 807 501
Tourism connected products	86 030	4 925	4 547 773
Non-tourism related consumption products	0	0	32 259 728
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/x32od8>

# Part II Partner country profiles



**From:**  
**OECD Tourism Trends and Policies 2022**

**Access the complete publication at:**  
<https://doi.org/10.1787/a8dd3019-en>

**Please cite this chapter as:**

OECD (2022), "United States", in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/607aaf29-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area. Extracts from publications may be subject to additional disclaimers, which are set out in the complete version of the publication, available at the link provided.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.