

U.S. Travel and Tourism Satellite Accounts for 2009–2012

By Steven L. Zemanek

THE TRAVEL and tourism industry—as measured by the real output of goods and services sold directly to visitors—increased 2.8 percent in 2012 after increasing 6.2 percent in 2011, according to the most recent statistics from the travel and tourism satellite accounts of the Bureau of Economic Analysis (BEA). In comparison, the broader economy—as measured by real gross domestic product—increased 2.2 percent in 2012 after increasing 1.8 percent in 2011.¹ Direct tourism employment increased 2.7 percent in 2012 after increasing 3.0 percent in 2011.

Highlights from the travel and tourism satellite accounts include the following:

- Nineteen of twenty-four commodities contributed to the growth in real tourism output in 2012, including traveler accommodations, food and beverage services, and gasoline.
- Inbound tourism increased 7.6 percent in 2012, and outbound tourism increased 5.0 percent. As a result, travel and tourism net exports increased to \$46.3 billion in 2012 from \$40.3 billion in 2011.
- Prices for tourism goods and services increased 2.5 percent in 2012 after increasing 5.0 percent in 2011.

1. All measures of travel and tourism activity not expressly identified as being in “real” terms are in current dollars.

Gasoline was the largest contributor to the price growth, followed by food and beverage services and domestic passenger air transportation.

This update of the travel and tourism accounts revises previously published statistics. These revised statistics primarily reflect the incorporation of detailed data from BEA’s annual revision of the industry accounts for 2009–2011 and summary statistics from the national income and product accounts (NIPAs) through 2012. The travel and tourism accounts are available on the BEA Web site at www.bea.gov; see the box “Data Availability.”

The remainder of this article discusses trends in travel and tourism output and prices, the composition of tourism demand, and tourism value added and employment. The core tables for travel and tourism accounts follow the article.

Trends in Output and Prices

Real output

Real direct travel and tourism output decelerated in 2012, increasing 2.8 percent after increasing 6.2 percent in 2011 (table A). The main contributors to the overall deceleration in growth were the deceleration in gasoline and the downturn in domestic passenger air

Table A. Annual Growth in Real Output by Tourism Commodity in 2007–2012

[Percentage change from preceding period]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	1.8	-5.4	-9.7	1.6	6.2	2.8
Traveler accommodations.....	3.9	0.9	-6.5	6.1	6.6	5.4
Food and beverage services.....	0.5	-7.3	-13.3	4.5	4.8	3.4
Transportation.....	2.3	-5.8	-6.2	0.5	7.1	2.0
Passenger air transportation.....	2.1	-3.5	-6.5	1.5	2.9	-2.2
Domestic passenger air transportation services.....	0.3	-5.6	-8.5	-4.3	2.8	-5.0
International passenger air transportation services.....	5.0	-0.2	-3.3	9.9	2.9	1.2
All other transportation-related commodities.....	2.4	-7.3	-5.8	-0.2	9.9	4.8
Passenger rail transportation services.....	10.0	-1.5	-1.7	-4.8	-2.4	2.9
Passenger water transportation services.....	4.8	1.6	0.4	6.9	8.0	15.5
Intercity bus services.....	-0.3	1.4	-19.3	-17.7	0.5	10.1
Intercity charter bus services.....	-10.5	5.5	-20.5	1.6	-3.5	3.1
Local bus and other transportation services.....	0.4	-9.8	-17.1	-8.0	2.0	1.4
Taxicab services.....	-1.3	-9.5	-12.4	-5.6	-5.1	3.1
Scenic and sightseeing transportation services.....	7.4	0.3	-12.4	9.0	6.3	2.8
Automotive rental and leasing.....	2.9	-5.6	-15.4	1.7	10.5	8.6
Other vehicle rental and leasing.....	2.7	-4.0	-10.0	0.4	1.8	5.0
Automotive repair services.....	-6.0	-17.5	16.2	-16.2	-9.5	-0.3
Parking.....	0.6	-10.9	-8.3	3.5	2.4	1.7
Highway tolls.....	-4.8	-9.1	4.0	-0.4	-7.9	7.5
Travel arrangement and reservation services.....	8.7	1.8	-12.6	8.0	5.7	2.9
Gasoline.....	0.7	-12.3	2.6	-2.6	17.5	4.0
Recreation, entertainment, and shopping.....	0.5	-8.0	-15.0	-2.1	5.5	1.8
Recreation and entertainment.....	1.3	-7.8	-11.2	-1.5	3.1	1.2
Motion pictures and performing arts.....	0.4	-10.1	-7.8	-1.1	5.4	-4.6
Spectator sports.....	2.0	-12.7	-18.4	0.7	5.0	-0.9
Participant sports.....	2.0	-11.1	-16.2	-4.1	5.6	6.0
Gambling.....	1.6	-5.1	-9.3	-1.6	0.2	-0.4
All other recreation and entertainment.....	0.4	-7.2	-11.9	-1.2	5.4	7.4
Nondurable PCE commodities other than gasoline.....	-0.1	-8.1	-17.9	-2.5	7.6	2.2

PCE Personal consumption expenditures

transportation services.

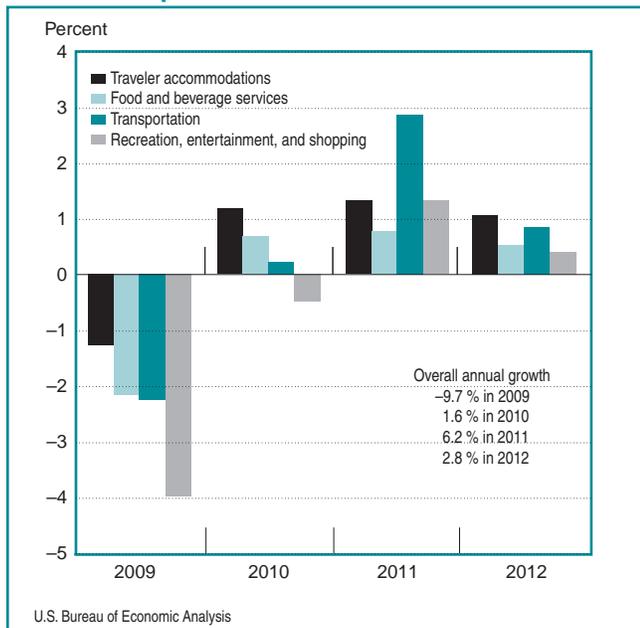
The increase in real output in 2012 was concentrated in a few commodities. The biggest contributors were traveler accommodations, food and beverage services, and gasoline. Traveler accommodations, which grew 5.4 percent, contributed 1.06 percentage points. Five commodities subtracted from growth, including domestic passenger air transportation services, which subtracted 0.46 percentage point (tables B, C, and chart 1).

Table B. Contributions to Growth in Real Tourism Output by Tourism Commodity in 2007–2012
[Percentage points]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	1.79	-5.37	-9.73	1.57	6.24	2.83
Traveler accommodations	0.72	0.17	-1.29	1.17	1.32	1.06
Food and beverage services	0.08	-1.17	-2.18	0.68	0.77	0.52
Transportation	0.86	-2.25	-2.26	0.22	2.85	0.84
Passenger air transportation	0.32	-0.55	-1.03	0.25	0.47	-0.36
Domestic passenger air transportation services	0.03	-0.53	-0.82	-0.40	0.26	-0.46
International passenger air transportation services	0.29	-0.02	-0.21	0.65	0.21	0.10
All other transportation-related commodities	0.54	-1.70	-1.23	-0.04	2.38	1.20
Passenger rail transportation services	0.02	0.00	0.00	-0.01	0.00	0.01
Passenger water transportation services	0.05	0.02	0.00	0.08	0.09	0.17
Intercity bus services	0.00	0.00	-0.05	-0.04	0.00	0.02
Intercity charter bus services	-0.03	0.01	-0.05	0.00	-0.01	0.01
Local bus and other transportation services	0.00	-0.05	-0.08	-0.04	0.01	0.01
Taxicab services	-0.01	-0.05	-0.07	-0.03	-0.03	0.01
Scenic and sightseeing transportation services	0.03	0.00	-0.06	0.04	0.03	0.01
Automotive rental and leasing	0.11	-0.23	-0.68	0.07	0.42	0.34
Other vehicle rental and leasing	0.00	0.00	-0.01	0.00	0.00	0.00
Automotive repair services	-0.09	-0.25	0.21	-0.27	-0.13	0.00
Parking	0.00	-0.03	-0.02	0.01	0.01	0.00
Highway tolls	0.00	-0.01	0.00	0.00	-0.01	0.01
Travel arrangement and reservation services	0.39	0.09	-0.64	0.37	0.28	0.14
Gasoline	0.06	-1.20	0.22	-0.22	1.71	0.48
Recreation, entertainment, and shopping	0.13	-2.12	-4.00	-0.50	1.31	0.40
Recreation and entertainment	0.15	-0.92	-1.33	-0.17	0.34	0.12
Motion pictures and performing arts	0.01	-0.19	-0.15	-0.02	0.10	-0.08
Spectator sports	0.02	-0.14	-0.19	0.01	0.05	-0.01
Participant sports	0.03	-0.17	-0.24	-0.05	0.07	0.07
Gambling	0.08	-0.25	-0.47	-0.08	0.01	-0.02
All other recreation and entertainment	0.01	-0.17	-0.28	-0.03	0.12	0.15
Nondurable PCE commodities other than gasoline	-0.02	-1.20	-2.67	-0.33	0.97	0.28

PCE Personal consumption expenditures

Chart 1. Contributions to Annual Growth in Real Tourism Output in 2009–2012



Data Availability

The detailed annual statistics on travel and tourism activity for 2011 are presented in eight tables at the end of this article. The complete set of detailed annual statistics for 1998–2011, statistics on output and employment for 2012, and quarterly statistics on output and employment for 1998–2012, are available on BEA’s Web site at www.bea.gov under “Industry” and “Satellite Accounts.”

Table C. Real Output by Tourism Commodity in 2007–2012
[Millions of chained (2005) dollars]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	742,520	702,673	634,307	644,251	684,464	703,825
Traveler accommodations	141,085	142,396	133,176	141,279	150,549	158,652
Food and beverage services	120,243	111,481	96,677	100,980	105,812	109,365
Transportation	276,251	260,131	244,114	245,424	262,737	268,038
Passenger air transportation	112,097	108,175	101,173	102,687	105,620	103,264
Domestic passenger air transportation services	67,878	64,044	58,577	56,041	57,618	54,731
International passenger air transportation services	44,228	44,124	42,681	46,926	48,272	48,858
All other transportation-related commodities	164,083	152,035	143,223	142,994	157,217	164,765
Passenger rail transportation services	1,325	1,305	1,282	1,221	1,192	1,227
Passenger water transportation services	8,909	9,049	9,090	9,714	10,489	12,119
Intercity bus services	1,697	1,722	1,389	1,143	1,149	1,265
Intercity charter bus services	1,735	1,831	1,456	1,479	1,428	1,473
Local bus and other transportation services	3,807	3,434	2,847	2,620	2,671	2,709
Taxicab services	4,320	3,908	3,425	3,232	3,067	3,162
Scenic and sightseeing transportation services	3,163	3,173	2,779	3,028	3,220	3,311
Automotive rental and leasing	29,255	27,623	23,370	23,773	26,276	28,524
Other vehicle rental and leasing	774	743	668	671	683	717
Automotive repair services	10,724	8,846	10,281	8,613	7,793	7,769
Parking	1,943	1,732	1,589	1,644	1,683	1,711
Highway tolls	551	501	521	519	478	513
Travel arrangement and reservation services	36,170	36,834	32,202	34,771	36,743	37,818
Gasoline	59,851	52,505	53,874	52,451	61,645	64,139
Recreation, entertainment, and shopping	205,040	188,709	160,429	157,087	165,770	168,685
Recreation and entertainment	89,708	82,735	73,447	72,315	74,558	75,438
Motion pictures and performing arts	14,472	13,015	12,000	11,868	12,511	11,939
Spectator sports	7,906	6,903	5,632	5,671	5,957	5,904
Participant sports	12,171	10,818	9,068	8,699	9,182	9,734
Gambling	37,531	35,620	32,320	31,799	31,865	31,751
All other recreation and entertainment	17,624	16,361	14,409	14,231	14,997	16,109
Nondurable PCE commodities other than gasoline	115,318	105,959	86,944	84,733	91,182	93,209

PCE Personal consumption expenditures

Prices

Travel and tourism price growth decelerated in 2012, increasing 2.5 percent after increasing 5.0 percent in 2011 (table D). Gasoline was the primary contributor to the deceleration, contributing 0.46 percentage point in 2012 after contributing 2.42 percentage points in 2011.

The price growth was distributed among several travel and tourism commodities. The largest contributors to the increase were gasoline, food and beverage services, and domestic passenger air transportation services. Gasoline prices, the leading contributor to price growth for 3 consecutive years, increased 3.8 percent. Food and beverage services grew 2.9 percent and contributed 0.45 percentage point, and domestic passenger air transportation services grew 4.6 percent and contributed 0.41 percentage point. These positive contributions were partly offset by automotive rental and

Table D. Annual Growth in Prices for Tourism Commodities in 2007–2012

[Percentage change from preceding period]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	3.7	5.7	-3.5	3.4	5.0	2.5
Traveler accommodations	4.4	1.9	-3.2	-0.6	1.6	1.8
Food and beverage services	3.7	4.5	3.8	1.2	2.4	2.9
Transportation	4.2	9.5	-9.5	7.9	9.2	2.9
Passenger air transportation	2.8	10.2	-9.7	9.0	7.2	4.6
Domestic passenger air transportation services	1.3	10.2	-7.0	7.3	7.8	4.6
International passenger air transportation services	5.3	10.2	-13.7	11.1	6.5	4.6
All other transportation-related commodities	5.2	9.0	-9.5	7.2	10.6	1.7
Passenger rail transportation services	4.7	3.8	1.4	0.8	4.4	3.9
Passenger water transportation services	-0.6	-1.6	-9.3	1.1	-0.9	-2.7
Intercity bus services	0.8	6.4	3.8	4.6	5.8	3.7
Intercity charter bus services	3.1	2.4	3.8	4.9	5.4	3.7
Local bus and other transportation services	2.3	3.1	4.5	4.1	4.7	3.2
Taxicab services	2.0	4.0	4.7	4.0	4.6	3.2
Scenic and sightseeing transportation services	3.0	2.5	1.6	0.3	0.1	2.2
Automotive rental and leasing	2.5	8.6	9.1	-0.7	-2.0	-2.4
Other vehicle rental and leasing	6.4	6.8	-2.7	2.5	4.4	0.4
Automotive repair services	3.4	4.9	4.1	1.9	2.1	1.7
Parking	3.3	6.5	7.8	3.3	2.3	8.7
Highway tolls	5.8	13.6	-7.5	5.8	8.6	1.7
Travel arrangement and reservation services	2.2	0.0	0.8	0.9	0.9	0.5
Gasoline	9.7	17.1	-27.8	18.8	26.1	3.8
Recreation, entertainment, and shopping	2.6	3.6	1.3	1.2	2.5	2.1
Recreation and entertainment	3.2	3.3	0.6	1.4	1.8	1.9
Motion pictures and performing arts	3.5	2.6	1.5	1.4	1.3	2.0
Spectator sports	5.0	5.3	2.6	2.1	0.0	3.2
Participant sports	1.8	1.1	-0.6	0.8	1.3	1.3
Gambling	3.0	3.8	-0.4	1.7	3.1	2.1
All other recreation and entertainment	3.6	3.6	1.7	1.1	0.5	1.1
Nonurable PCE commodities other than gasoline	2.1	3.8	2.0	1.0	3.0	2.3

PCE Personal consumption expenditures

leasing, which subtracted 0.10 percentage point from the growth (tables E, F, and chart 2).

Total output

Total tourism-related output increased to \$1.46 trillion in 2012, up 5.7 percent from \$1.38 trillion in 2011. In 2012, total output consisted of \$868.0 billion in direct tourism output and \$593.2 billion in indirect tourism output. The 1.68 ratio of total output to direct output

Table E. Contributions to Annual Growth in the Chain-Type Price Indexes for Tourism Commodities in 2007–2012

[Percentage points]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	3.71	5.66	-3.50	3.44	4.96	2.50
Traveler accommodations	0.81	0.38	-0.59	-0.12	0.33	0.37
Food and beverage services	0.59	0.72	0.54	0.20	0.38	0.45
Transportation	1.61	3.61	-3.75	3.06	3.66	1.19
Passenger air transportation	0.44	1.58	-1.52	1.42	1.18	0.73
Domestic passenger air transportation services	0.12	0.94	-0.63	0.67	0.70	0.41
International passenger air transportation services	0.32	0.64	-0.89	0.75	0.48	0.32
All other transportation-related commodities	1.17	2.02	-2.23	1.64	2.49	0.46
Passenger rail transportation services	0.01	0.01	0.00	0.00	0.01	0.01
Passenger water transportation services	-0.01	-0.02	-0.10	0.01	-0.01	-0.03
Intercity bus services	0.00	0.02	0.01	0.01	0.01	0.01
Intercity charter bus services	0.01	0.01	0.01	0.01	0.01	0.01
Local bus and other transportation services	0.01	0.02	0.02	0.02	0.02	0.01
Taxicab services	0.01	0.02	0.02	0.02	0.02	0.01
Scenic and sightseeing transportation services	0.01	0.01	0.01	0.00	0.00	0.01
Automotive rental and leasing	0.10	0.34	0.34	-0.03	-0.09	-0.10
Other vehicle rental and leasing	0.01	0.01	0.00	0.00	0.00	0.00
Automotive repair services	0.05	0.07	0.05	0.03	0.03	0.02
Parking	0.01	0.02	0.02	0.01	0.01	0.02
Highway tolls	0.00	0.01	-0.01	0.01	0.01	0.00
Travel arrangement and reservation services	0.10	0.00	0.03	0.05	0.05	0.02
Gasoline	0.85	1.52	-2.64	1.50	2.42	0.46
Recreation, entertainment, and shopping	0.70	0.95	0.31	0.30	0.58	0.49
Recreation and entertainment	0.38	0.39	0.06	0.17	0.20	0.20
Motion pictures and performing arts	0.07	0.05	0.03	0.03	0.02	0.04
Spectator sports	0.05	0.05	0.02	0.02	0.00	0.03
Participant sports	0.03	0.02	-0.01	0.01	0.02	0.02
Gambling	0.15	0.19	-0.02	0.08	0.15	0.09
All other recreation and entertainment	0.09	0.08	0.03	0.03	0.01	0.02
Nonurable PCE commodities other than gasoline	0.31	0.56	0.25	0.13	0.39	0.29

PCE Personal consumption expenditures

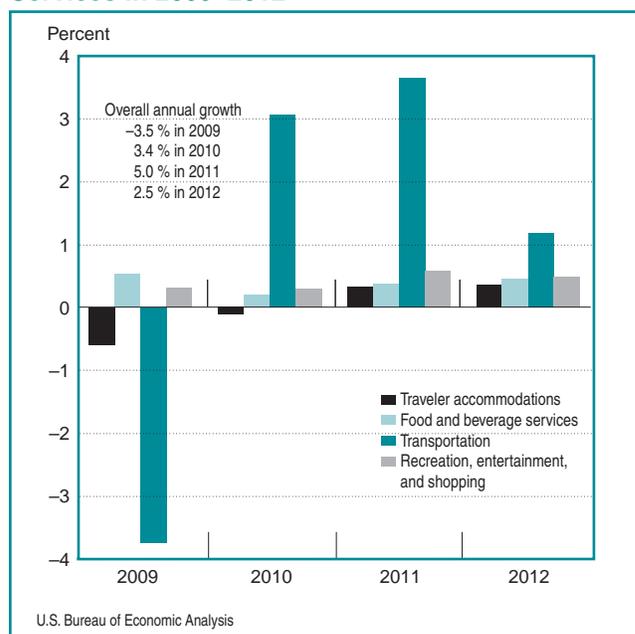
Table F. Chain-Type Price Indexes for Tourism Commodities in 2007–2012

[Index numbers, 2005=100]

Commodity	2007	2008	2009	2010	2011	2012
All tourism goods and services	108.4	114.5	110.5	114.3	120.0	123.0
Traveler accommodations	108.1	110.2	106.7	106.1	107.8	109.8
Food and beverage services	107.0	111.8	116.0	117.5	120.3	123.8
Transportation	111.6	122.1	110.5	119.2	130.2	133.9
Passenger air transportation	109.7	120.8	109.1	118.9	127.5	133.4
Domestic passenger air transportation services	108.7	119.8	111.5	119.6	129.0	134.9
International passenger air transportation services	111.1	122.4	105.7	117.4	125.0	130.8
All other transportation-related commodities	112.9	123.0	111.3	119.3	131.9	134.3
Passenger rail transportation services	112.3	116.5	118.1	119.0	124.2	129.1
Passenger water transportation services	99.1	97.4	88.4	89.4	88.6	86.1
Intercity bus services	108.1	115.0	119.4	124.8	132.0	136.9
Intercity charter bus services	106.8	109.4	113.5	119.1	125.5	130.1
Local bus and other transportation services	106.3	109.6	114.5	119.2	124.9	128.8
Taxicab services	105.5	109.7	114.8	119.4	124.9	128.9
Scenic and sightseeing transportation services	106.8	109.4	111.1	111.5	111.6	113.9
Automotive rental and leasing	109.0	118.4	129.2	128.3	125.7	122.8
Other vehicle rental and leasing	107.3	114.7	111.6	114.4	119.5	119.9
Automotive repair services	107.7	113.0	117.6	119.8	122.3	124.4
Parking	106.3	113.3	122.1	126.2	129.1	140.3
Highway tolls	117.1	133.1	123.0	130.1	141.3	143.7
Travel arrangement and reservation services	105.8	105.8	106.6	107.6	108.6	109.1
Gasoline	123.6	144.8	104.5	124.1	156.5	162.6
Recreation, entertainment, and shopping	105.0	108.7	110.2	111.5	114.3	116.7
Recreation and entertainment	106.5	110.0	110.7	112.2	114.3	116.4
Motion pictures and performing arts	107.1	109.9	111.6	113.1	114.6	116.9
Spectator sports	108.9	114.7	117.6	120.1	120.1	124.1
Participant sports	103.9	105.1	104.4	105.2	106.6	107.9
Gambling	106.2	110.3	109.9	111.8	115.3	117.7
All other recreation and entertainment	107.3	111.0	112.8	114.1	114.6	116.0
Nonurable PCE commodities other than gasoline	103.8	107.7	109.9	110.9	114.3	116.9

PCE Personal consumption expenditures

Chart 2. Contributions to Annual Growth in the Chain-Type Price Index for Tourism Goods and Services in 2009–2012



means that every dollar of direct tourism output required an additional 68 cents of indirect tourism output (chart 3).

Direct tourism output includes goods and services sold directly to visitors, such as passenger air travel. Indirect tourism output includes sales of all goods and services used to produce that direct output, such as jet fuel to fly the plane and catering services for longer international flights.

Chart 3. Total Tourism-Related Output in 2009–2012

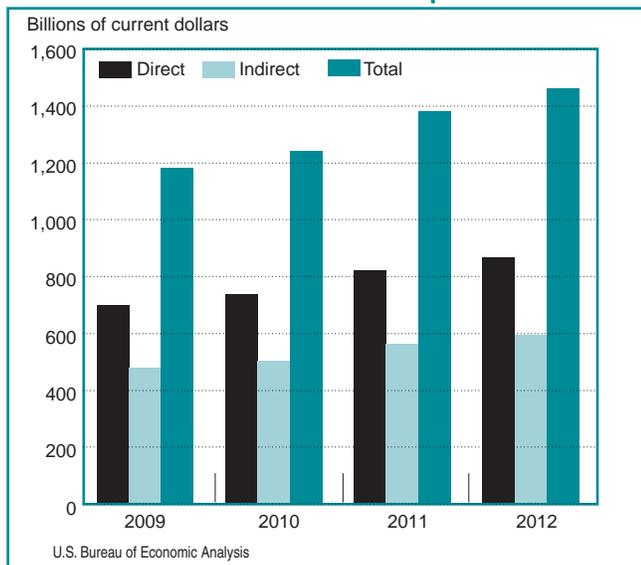
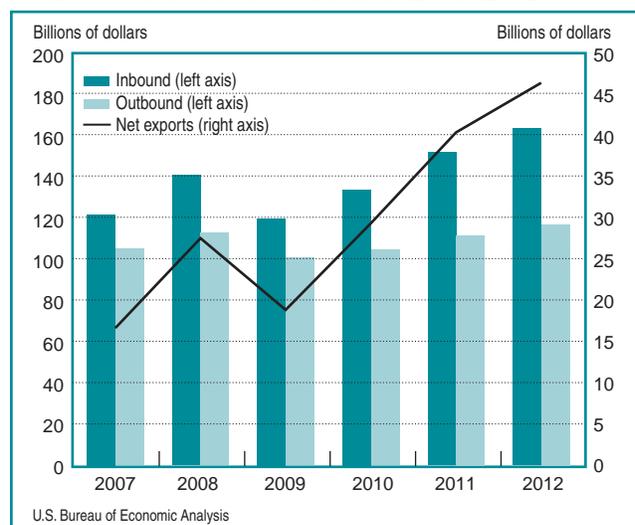


Chart 4. U.S. Trade in Tourism in 2007–2012



The Composition of Tourism Demand

The travel and tourism accounts include estimates of the composition of tourism demand by type of visitor. They distinguish expenditures of U.S. residents traveling abroad from those of U.S. residents and nonresidents traveling within the United States for leisure, business, or government purposes. Net exports of tourism trade is derived by subtracting expenditures on foreign travel by U.S. residents (an import of goods and services to outbound travelers) from expenditures on U.S. travel by nonresidents (an export of goods and services to inbound travelers).

International travel and tourism

Current-dollar international travel (the sum of inbound and outbound travel) increased 6.5 percent in 2012 after increasing 10.5 percent in 2011. The increase in inbound activity was larger than the increase in outbound activity, which resulted in a robust increase in travel and tourism net exports (\$46.3 billion, table G).

Table G. U.S. International Travel and Tourism in 2007–2012
[Billions of dollars]

	2007	2008	2009	2010	2011	2012
Total international travel and tourism.....	226.3	252.9	220.0	237.7	262.7	279.8
Inbound travel and tourism.....	121.4	140.2	119.4	133.5	151.5	163.0
Outbound travel and tourism.....	104.8	112.7	100.6	104.2	111.2	116.7
Net exports of travel and tourism.....	16.6	27.5	18.8	29.3	40.3	46.3

Inbound travel and tourism. This consists of travel-related expenditures and international transportation purchases from U.S. providers by nonresidents traveling in the United States. In 2012, inbound tourism grew 7.6 percent to \$163.0 billion after increasing 13.5 percent in 2011 (chart 4). The growth reflected

the improvement of the global economy as visitors from countries with relatively stronger currencies continued to increase.²

Outbound travel and tourism. This consists of travel-related expenditures and international transportation purchases from foreign providers by U.S. residents traveling abroad. In 2012, outbound activity increased 5.0 percent to \$116.7 billion.

Internal travel and tourism. This consists of travel and tourism within the borders of the United States—the sum of domestic activity and inbound activity.³ Inbound travel and tourism’s share of internal tourism in 2011 (the most recent year for which data are available) accounted for 15.0 percent of total internal tourism (table H and chart 5).

National tourism. This consists of travel and tourism by U.S. residents, both within the United States and abroad—the sum of domestic tourism and outbound tourism. The calculation of outbound tourism

2. See Sarah P. Scott, “U.S. International Transactions,” SURVEY OF CURRENT BUSINESS 93 (April 2013): 28–37.

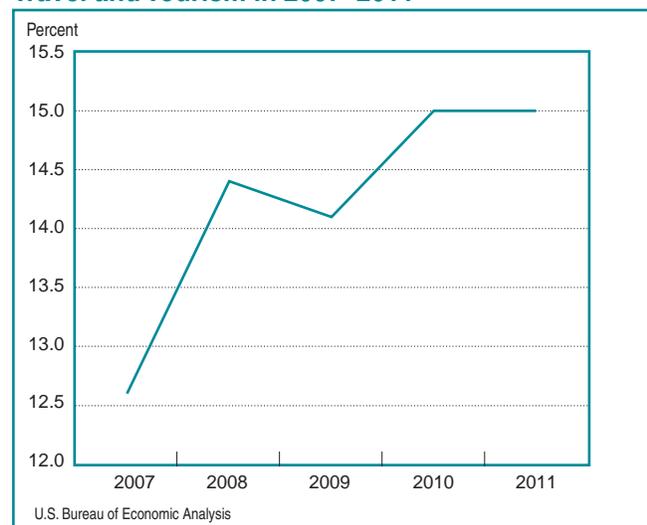
3. As a component of internal tourism, the calculation of inbound tourism is modified to exclude all expenditures on international transportation, whether purchased from foreign or U.S. providers, so that expenditures by U.S. residents traveling within the United States (domestic tourism) can be compared with expenditures by nonresidents traveling within the United States (inbound tourism).

Table H. Internal Travel and Tourism in the United States by Residents and Nonresidents in 2005–2011

Year	Millions of dollars			Share	
	Residents	Nonresidents (inbound)	Total	Residents	Nonresidents (inbound)
2005.....	593,195	81,843	675,038	87.9	12.1
2006.....	646,023	85,815	731,838	88.3	11.7
2007.....	673,897	96,922	770,819	87.4	12.6
2008.....	655,426	110,387	765,813	85.6	14.4
2009.....	572,407	94,181	666,588	85.9	14.1
2010.....	588,440	103,443	691,883	85.0	15.0
2011.....	657,650	116,035	773,685	85.0	15.0

includes all expenditures on international transportation, whether purchased from foreign or U.S. providers

Chart 5. Inbound Tourism's Share of Internal Travel and Tourism in 2007–2011



ers so that expenditures by U.S. residents traveling within the United States (domestic tourism) are consistent with expenditures by U.S. residents traveling abroad (outbound tourism). Outbound tourism's share of national tourism was 18.0 percent in 2011 (the most recent year for which data are available), which is down from the peak of 18.9 percent in 2010 (table I and chart 6).

Table I. National Travel and Tourism in the United States and Abroad in 2005–2011

Year	Millions of dollars			Percent	
	In the United States	Abroad (outbound)	Total	In the United States	Abroad (outbound)
2005.....	593,195	121,341	714,536	83.0	17.0
2006.....	646,023	130,639	776,662	83.2	16.8
2007.....	673,897	137,225	811,122	83.1	16.9
2008.....	655,426	144,647	800,073	81.9	18.1
2009.....	572,407	127,623	700,031	81.8	18.2
2010.....	588,440	136,983	725,423	81.1	18.9
2011.....	657,650	144,273	801,923	82.0	18.0

Key Terms

The following key terms are used to describe the travel and tourism satellite accounts.

Domestic tourism. Travel-related expenditures by U.S. residents traveling within the United States. It comprises travel by resident households, business travel, and travel by government employees.

Inbound tourism. Travel-related expenditures by non-residents traveling within the United States and expenditures by nonresidents on international transportation purchased from U.S. providers.¹ These expenditures exclude expenditures for travel to study in the United States and for medical reasons.

Internal tourism. The sum of domestic tourism expenditures and inbound tourism expenditures (net of all international transportation expenditures).

National tourism. The sum of domestic tourism demand and outbound tourism demand (including all international transportation expenditures).

Outbound tourism. Travel-related expenditures by U.S. residents traveling abroad and expenditures by U.S. residents on international transportation purchased from foreign providers.

Tourism commodities. Goods and services that are typically purchased by visitors, such as airline passenger transportation, hotel accommodations, and meals.²

1. In the travel and tourism satellite accounts, inbound and outbound visitors are not differentiated by type of visitor, because the data to prepare these estimates are not available.

2. The classification of tourism commodities in the travel and tourism satellite accounts is based on a list of primary activities of visitors that was developed from recommendations by the World Tourism Organization, by the Organization for Economic Co-operation and Development, and from various surveys of U.S. visitors.

Tourism employment. Total tourism-related employment consists of direct tourism employment plus indirect tourism employment. Direct tourism employment comprises all jobs where the workers are engaged in the production of direct tourism output (for example, hotel staff and airline pilots), and indirect tourism employment comprises all jobs where the workers are engaged in the production of indirect tourism output (for example, workers producing hotel toiletries and delivering fuel to airlines).

Tourism output. Total tourism-related output consists of direct tourism output and indirect tourism output. Direct tourism output comprises all domestically produced goods and services purchased by travelers (for example, traveler accommodations and passenger air transportation), and indirect tourism output comprises all output required to support the production of direct tourism output (for example, toiletries for hotel guests and fuel for airplanes).

Usual environment. The area of normal, everyday activities within 50–100 miles of home.³

Visitor. A person who travels outside of his or her usual environment for less than a year or who stays overnight in a hotel or motel. The visitor may travel for pleasure or business (private sector or government). Visitors exclude travelers who expect to be compensated at the location of their visit (such as migrant workers, persons traveling to new assignments, and diplomatic and military personnel traveling to and from their duty stations and their home countries).

3. The usual environment depends on the availability of source data.

Chart 6. Outbound Tourism's Share of National Travel and Tourism in 2007–2011

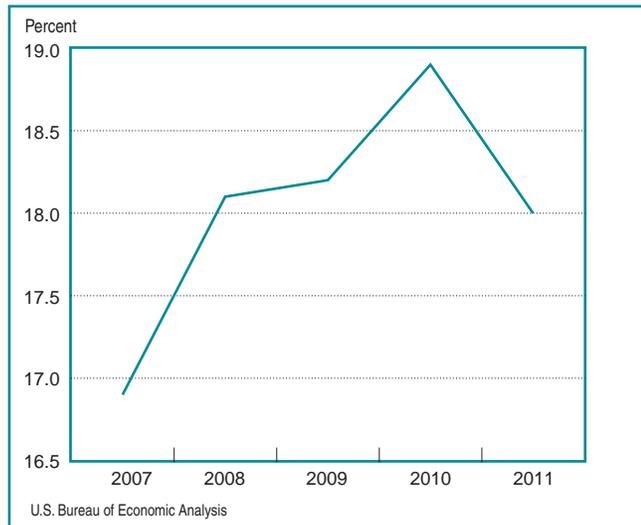
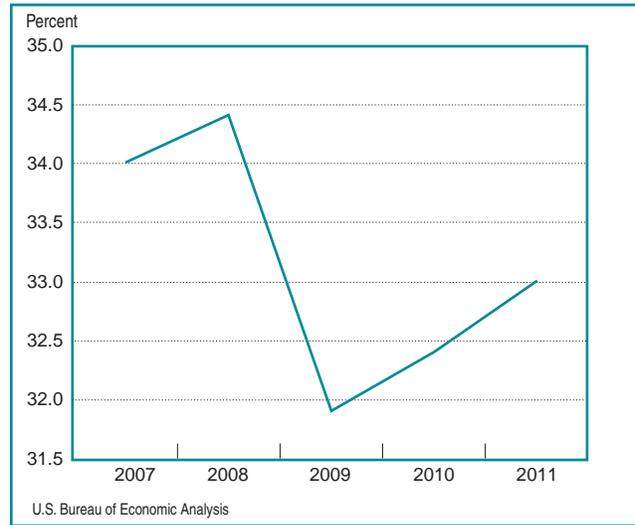


Chart 7. Business Travel's Share of Domestic Travel and Tourism in 2007–2011



Domestic travel and tourism

Domestic tourism includes travel and tourism by U.S. residents within the borders of the United States. Puerto Rico, the U.S. Virgin Islands, and the other U.S. territories are outside of this defined boundary and are classified in “international travel.” The travel and tourism accounts break out all expenditures on domestic travel and tourism by type of visitor: resident households, business, and government. Business’ share of domestic travel and tourism increased to 33.0 percent in 2011 (the most recent year for which data are available). Government expenditures accounted for 4.9 percent of domestic travel and tourism in 2011, a slight decrease from the share in 2010. In general, government travel is more stable than business or leisure travel, and as a result, government’s share tends to increase during downturns in travel and tourism and decrease during upturns. (table J and chart 7).

Table J. Domestic Travel and Tourism by Type of Visitor in 2005–2011

Year	Millions of dollars				Percent		
	Resident households	Business	Government	Total	Resident households	Business	Government
2005	375,251	199,380	26,208	600,839	62.5	33.2	4.4
2006	405,254	220,773	27,807	653,834	62.0	33.8	4.3
2007	422,036	231,513	28,369	681,918	61.9	34.0	4.2
2008	405,734	228,482	29,055	663,270	61.2	34.4	4.4
2009	363,677	185,081	30,782	579,540	62.8	31.9	5.3
2010	372,005	193,165	30,988	596,158	62.4	32.4	5.2
2011	413,730	219,853	32,339	665,922	62.1	33.0	4.9

Tourism Value Added and Employment

Value added

A sector’s value added measures its contribution to gross domestic product (GDP). In 2011 (the most recent year for which data are available), the travel and tourism industry’s share of GDP was 2.8 percent (table K). Travel and tourism’s share of GDP remains a larger share of GDP than industries such as broadcasting and telecommunications, utilities, and computer and electronic products manufacturing.

Direct employment

Direct tourism employment includes jobs that involve producing goods and services that are sold directly to visitors. Examples include restaurant servers, hotel

Table K. Travel and Tourism as a Share of Gross Domestic Product in 2005–2011

Year	Billions of dollars		Percent
	Gross domestic product (GDP)	Tourism value added	Tourism value added as a share of GDP
2005	12,623	376	2.98
2006	13,377	402	3.01
2007	14,029	422	3.01
2008	14,292	399	2.79
2009	13,974	367	2.63
2010	14,499	381	2.63
2011	15,076	415	2.75

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clerks, and flight attendants. In 2012, direct employment increased 2.7 percent. The largest contributor to the increase was food services and drinking places, which contributed 1.18 percentage points to the overall growth. Traveler accommodations was the second leading contributor and contributed 0.48 percentage point (table L and chart 8). Except for a small decrease

in interurban charter bus transportation, employment in most other industries held constant or increased slightly in 2012 (table M).

Table L. Contributions to Growth in Employment by Tourism in 2007–2012
(Percentage points)

Industry	2007	2008	2009	2010	2011	2012
All tourism industries	1.01	-4.24	-8.32	-1.04	3.00	2.65
Traveler accommodations	0.39	-0.02	-1.63	0.36	0.77	0.48
Nonfarm residential tenant occupied permanent site	0.01	0.00	-0.01	-0.01	-0.01	0.00
Food services and drinking places	0.45	-1.61	-3.50	0.85	0.98	1.18
Transportation	0.14	-0.44	-1.28	-0.57	0.39	0.33
Air transportation services	0.08	-0.05	-0.43	-0.11	0.15	0.06
All other transportation-related industries	0.07	-0.38	-0.85	-0.47	0.24	0.27
Rail transportation services	0.01	-0.01	0.00	-0.03	0.00	0.01
Water transportation services	-0.02	-0.03	-0.06	0.01	0.01	0.01
Interurban bus transportation	-0.01	0.00	-0.01	0.00	0.00	0.00
Interurban charter bus transportation	0.00	0.01	-0.02	-0.01	0.00	-0.01
Urban transit systems and other transportation	0.02	-0.07	-0.10	-0.04	0.02	0.02
Taxi service	0.05	-0.04	-0.08	-0.04	0.03	0.02
Scenic and sightseeing transportation services	0.01	0.00	-0.02	0.00	0.01	0.01
Automotive equipment rental and leasing	0.03	-0.03	-0.23	-0.06	0.04	0.08
Automotive repair services	-0.03	-0.12	0.13	-0.17	-0.08	0.00
Parking lots and garages	0.00	0.01	0.00	0.00	0.00	0.01
Toll highways	0.00	0.00	0.00	0.00	0.00	0.00
Travel arrangement and reservation services	0.01	-0.02	-0.42	-0.12	0.03	0.05
Petroleum refineries	0.00	-0.01	0.00	-0.01	0.01	0.00
Gasoline service stations	-0.02	-0.06	-0.05	-0.01	0.17	0.07
Recreation, entertainment, and shopping	0.01	-1.78	-1.75	-1.20	0.47	0.47
Recreation and entertainment	0.06	-0.77	-1.07	-0.24	0.32	0.30
Motion pictures and performing arts	-0.02	-0.05	-0.05	0.00	0.01	0.01
Spectator sports	0.01	-0.13	-0.13	0.00	0.06	0.04
Participant sports	-0.02	-0.44	-0.50	-0.14	0.18	0.10
Gambling	0.08	-0.01	-0.17	-0.09	0.00	0.09
All other recreation and entertainment	0.00	-0.14	-0.22	-0.01	0.07	0.06
Shopping	-0.05	-1.01	-0.69	-0.96	0.16	0.17
Industries producing nondurable PCE commodities, excluding petroleum refineries	-0.18	-0.30	-0.20	-0.32	0.01	0.03
Retail trade services, excluding gasoline service stations	0.13	-0.70	-0.49	-0.64	0.15	0.13
All other industries	0.01	-0.40	-0.14	-0.46	0.39	0.19
All other industries, excluding wholesale trade and transportation services	0.00	-0.04	-0.12	-0.01	0.06	0.03
Wholesale trade and transportation services	0.01	-0.36	-0.02	-0.45	0.33	0.16

PCE Personal consumption expenditures

Chart 8. Contributions to Annual Growth in Direct Tourism Employment in 2009–2012

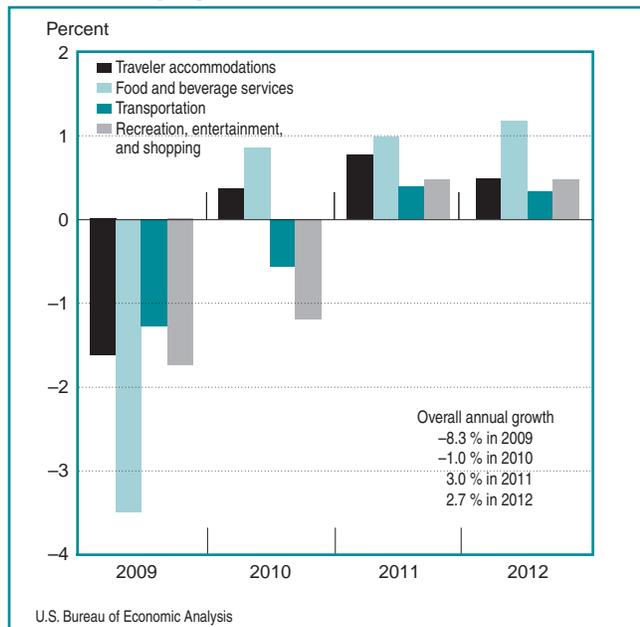


Table M. Direct Employment by Tourism Industry in 2007–2012
(Thousands)

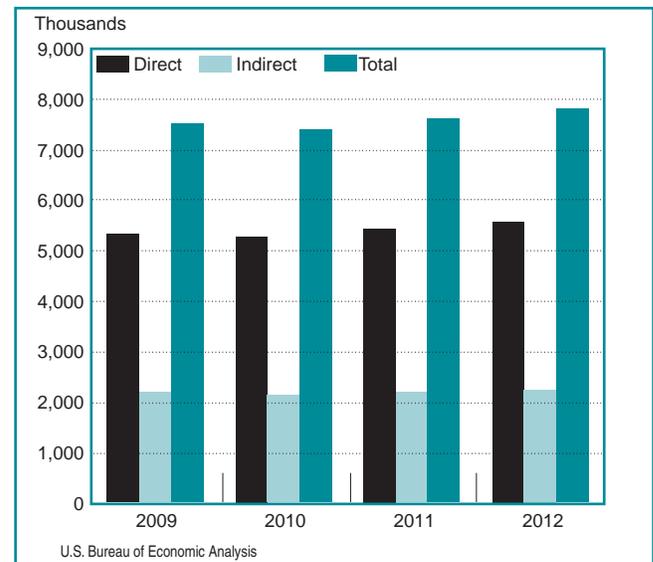
Industry	2007	2008	2009	2010	2011	2012
All tourism industries	6,083	5,825	5,340	5,285	5,443	5,588
Traveler accommodations	1,371	1,370	1,275	1,294	1,335	1,361
Nonfarm residential tenant occupied permanent site	10	10	9	9	9	9
Food services and drinking places	1,985	1,888	1,684	1,729	1,781	1,846
Transportation	1,173	1,146	1,071	1,041	1,061	1,079
Air transportation services	485	482	457	451	459	462
All other transportation-related industries	687	664	614	589	602	617
Rail transportation services	9	8	9	7	7	8
Water transportation services	38	36	32	32	33	33
Interurban bus transportation	20	20	19	19	19	19
Interurban charter bus transportation	21	22	21	20	21	20
Urban transit systems and other transportation	57	53	47	45	46	47
Taxi service	53	51	46	44	45	46
Scenic and sightseeing transportation services	16	16	15	15	15	16
Automotive equipment rental and leasing	115	114	101	98	100	104
Automotive repair services	47	40	47	38	34	34
Parking lots and garages	14	15	15	15	15	15
Toll highways	4	4	4	4	3	3
Travel arrangement and reservation services	204	203	178	172	174	176
Petroleum refineries	8	7	7	7	8	8
Gasoline service stations	81	77	74	74	83	87
Recreation, entertainment, and shopping	1,278	1,169	1,067	1,003	1,028	1,054
Recreation and entertainment	656	609	547	534	551	567
Motion pictures and performing arts	27	24	21	21	22	22
Spectator sports	77	68	61	61	64	66
Participant sports	242	215	186	179	188	194
Gambling	180	179	170	165	165	170
All other recreation and entertainment	130	122	109	108	112	115
Shopping	622	561	521	469	478	487
Industries producing nondurable PCE commodities, excluding petroleum refineries	161	143	131	114	114	116
Retail trade services, excluding gasoline service stations	461	418	389	355	363	370
All other industries	266	241	233	208	229	239
All other industries, excluding wholesale trade and transportation services	75	73	66	65	68	70
Wholesale trade and transportation services	190	168	167	143	160	169

PCE Personal consumption expenditures

Total employment

Total tourism-related employment (the sum of direct and indirect jobs) increased to 7.8 million jobs in 2012. The 7.8 million jobs consisted of 5.6 million direct tourism jobs and 2.2 million indirect tourism jobs (chart 9). Direct tourism employment comprises jobs

Chart 9. Total Tourism-Related Employment in 2009–2012



U.S. Bureau of Economic Analysis

that produce direct tourism output, such as airline pilots, and indirect tourism employment comprises jobs that produce indirect tourism output, such as refinery workers producing jet fuel. The most recent data indicate that for every 10 direct tourism jobs generated, an additional four jobs are indirectly generated.

Data Table Guide and Methodology

The advance estimates for 2012 are presented in three tables. The first table presents direct and total tourism-related output. The second table presents direct and total tourism-related employment. The third table presents real tourism output. The revised estimates for 2011 are presented in a set of eight core tables: Production of commodities by industry, supply and consumption of commodities, demand for commodities by type of visitor, output and value added by industry, output by commodity, employment and compensation of employees by industry, total tourism-related employment by industry, and real tourism output.

Table 1. Production of Commodities by Industry

This table presents 26 industry categories that produce goods and services purchased by visitors and the value of that production. It presents estimates of each industry's value added and the three value added components: Compensation of employees, "taxes on production and imports, less subsidies," and gross operating surplus.

The estimates of commodities purchased by visitors and the industries that produce the commodities are from the annual input-output (I-O) accounts. Production data are extracted and arranged into a matrix. This table shows the tourism-related commodities (rows) produced by each tourism-related industry (columns).

Table 2. Supply and Consumption of Commodities

This table presents information on the supply of 32 commodities (valued in producers' prices and purchasers' prices), and the consumption of these commodities (valued in purchasers' prices) as intermediate purchases by business and government and as final purchases by resident households, business, government, and foreigners.

The estimates of total supply in purchasers' prices are derived by summing domestic production by commodity in producers' prices, imports, wholesale and retail margins, and transportation costs and by adjusting for change in private inventories. Total consumption is the sum of intermediate expenditures (private

and government), personal consumption expenditures, gross private fixed investment, government final expenditures, and exports of goods and services.

Data on imports, changes in private inventories, wholesale trade and transportation costs, and retail trade margins are extracted from the annual I-O accounts and added to the estimates for domestic production found in table 1 to arrive at estimates for total supply, by commodity. Then, using more data from the annual I-O accounts, the estimates for total supply are disaggregated into intermediate private expenditures, intermediate government expenditures, personal consumption expenditures, gross private fixed investment, government final expenditures, and exports.

Table 3. Demand for Commodities by Type of Visitor

This table details the portion of total consumption of each commodity consumed by four types of visitors—resident households, businesses, government, and nonresidents. For each commodity, the table also provides a tourism commodity ratio—visitor consumption divided by total consumption. A commodity's tourism commodity ratio indicates the share of its output that is sold to visitors.

These estimates are based on survey data on visitor spending behavior that are used to break down total consumption estimates from the supply and consumption of commodities table into tourism demand by type of visitor.⁴ Total tourism demand is the sum of demand by the four types of domestic visitors (resident households, business, government, and nonresidents).

Table 3a. Demand for Commodities by Type of Visitor (Unadjusted for Travel Arrangement Commissions)

This table presents the same data as "Table 3. Demand for Commodities by Type of Visitor," but travel agency commissions have not been moved.

Table 4. Output and Value Added by Industry

This table presents estimates of tourism output, intermediate consumption, and value added by industry. It also presents each industry's total output, total intermediate consumption, and total value added. Each industry's tourism industry ratio is also provided. This ratio represents the share of each industry's output,

4. The surveys used to estimate demand for commodities by type of visitor are the Consumer Expenditure Survey of the Bureau of Labor Statistics, the Survey of International Air Travelers (SIAT) of the Department of Commerce's International Trade Administration, and private surveys done by D.K. Shifflet and Associates.

intermediate consumption, and value added that is consumed by visitors.

Tourism industry ratios are calculated from estimates in the production by industry table (table 1) and from the demand for commodities table (table 3). The industry output estimates from the production table are multiplied by the tourism commodity ratios from the demand table in order to obtain tourism industry ratios. The estimates of tourism output, tourism intermediate consumption, and tourism value added are calculated by multiplying industry output, intermediate consumption, and value added by the tourism industry ratios.

Table 5. Output by Tourism Commodity

This table presents estimates of direct tourism output and total tourism-related output by commodity. For each commodity, the table also presents domestic production (at purchasers' prices), the tourism commodity ratio, and the total commodity output multiplier.

For each commodity, direct tourism output is calculated by multiplying the values for total commodity production found in table 1 by the tourism commodity ratios found in table 3. Then, utilizing total commodity output multipliers derived from the annual I-O accounts, each commodity's total tourism-related output is estimated by multiplying its direct tourism output by its total output multiplier.

Table 6. Employment and Employee Compensation by Industry

This table presents estimates of tourism employment, tourism compensation, and average compensation per tourism employee by industry. This table also presents total industry employment, total industry compensation, and tourism industry ratios.

Industry employment and compensation data are extracted from the annual I-O accounts and multiplied by each industry's tourism output ratio from table 4 to produce estimates for tourism employment and tourism compensation by industry. Average compensation per tourism employee by industry is calculated by dividing tourism compensation by tourism employment for each industry.

Table 7. Total Tourism-Related Employment by Industry

This table presents estimates of direct tourism employment, the total industry multiplier, and the total tourism-related employment.

Utilizing total industry employment multipliers supplied by BEA's Regional Economic Accounts, each industry's total tourism-related employment is estimated by multiplying its direct tourism employment by its total employment multiplier.

Table 8. Real Tourism Output by Commodity

This table presents estimates of direct tourism output in current dollars by commodity, chain-type price indexes for each commodity, and real output for each commodity.

Price data are extracted from the annual I-O accounts to calculate chain-type price indexes for 21 of the 24 tourism commodities. The remaining three tourism commodities—international passenger air transportation, gasoline, and nondurable Personal Consumption Expenditures (PCE) commodities other than gasoline—use price data from the National Income and Product Accounts (NIPAs). The chain-type indexes are used to deflate the estimates for current-dollar direct tourism output presented in table 5, creating estimates of real tourism output.

Tables 1 through 8 follow.