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TRAVEL AND TOURISM IN THE USA: INDUSTRY DEVELOPMENT TRENDS

The travel and tourism industry has evolved over the past six decades into one of the world's most significant economic sectors. Travel and tourism are critical to the American economy. This growing industry offers significant potential for job creation across all regions of the country. A considerable competitive advantage of the USA as a tourism destination lies in the variety of experiences the country offers, ranging from large cities and small-town to the many unique historic places and ethnic heritage sites, national parks, camping, hiking, environmental or ecological sites, and well-known theme park.

The United States leads the world in revenues from international travel and tourism and ranks second in the number of international visitors. The United States welcomed nearly 75 million international visitors and received 177,2 billion dollars International Tourism Receipts in 2014.

But the global travel market has become increasingly competitive. Other countries actively market themselves, and new destinations are aggressively competing for market share. According to World Bank data, the United States received 6,6% of global tourism arrivals in 2014 and accounted for nearly 14,2% of global spending on travel and tourism, down from 7,4% and 17%, respectively, in 2000. Because of that the U.S. market share of spending by international travelers has decreased and the government needs to work hard to support sectors of the economy such as the tourism industry. American experience is highly relevant for countries like Ukraine, which only seek their niche in the global tourism market.

Keywords: USA, travel and tourism, international travelers, tourism destination, WTO, national parks.

Валентина Смаль. СУЧАСНІ ТЕНДЕНЦІЇ РОЗВИТКУ ТУРИСТИЧНОЇ ІНДУСТРІЇ США

Туризм є одним із значущих економічних секторів США, вагомим фактором експортного потенціалу американської економіки, важливою сферою прикладання праці, джерелом довгострокового розвитку. У статті проаналізовано роль США у глобальній туристичній індустрії, динаміку розвитку туристичної галузі країни, головні показники розвитку виїзного та в'їзного міжнародного туризму США, розглянуто основні проблеми розвитку туристичного сектору, описані заходи, що вживаються зацікавленими сторонами для вирішення цих проблем.

Ключові слова: США, туризм, міжнародні туристи, туристичний маршрут, WTO, національні парки.

Валентина Смаль. СОВРЕМЕННЫЕ ТЕНДЕНЦИИ РАЗВИТИЯ ТУРИСТИЧЕСКОЙ ИНДУСТРИИ США

Туризм является одним из значимых экономических секторов США, весомым фактором экспортного потенциала американской экономики, важной сферой приложения труда, источником долгосрочного развития. В статье проанализирована роль США в глобальной туристической индустрии, динамика развития туристической отрасли страны, главные показатели развития выездного и въездного международного туризма США, рассмотрены основные проблемы развития туристического сектора, описаны меры, предпринимаемые заинтересованными сторонами для решения этих проблем.

Ключевые слова: США, туризм, международные туристы, туристический маршрут, WTO, национальные парки.

Introduction. The world's tourism industry has become a significant economic sector for many countries. Travel and Tourism is one of the important USA industries that serve millions of tourists annually. American tourism competes in the international market, so it is important to understand modern trends in the USA travel industry. Therefore, this paper offers insight into essential trends and strategies for policy makers which are involved in the Travel and Tourism industry. Studying USA as a country with rich tourism resources and a long tradition of tourism businesses is most interesting, in our view, in terms of knowledge and experience in identifying and overcoming development problems. Consideration of such an experience would help Ukraine avoid many problems and easier to search for their niche in the global tourism market.

Contemporary World Travel Trends. Over the post World War II period, the Travel and Tourism industry has experienced sustained growth and diversification to become one of the most significant economic sectors in the global economy.

The Travel and Tourism industry provides 2,9% of the world gross domestic product (GDP). In absolute

terms, it is 2,1 trillion dollars of the USA. This figure rises to 6 trillion dollars and to 9% taking into account the indirect impact, that comes from the development of manufacturing and agriculture, operating for the needs of tourism industry. Tourism ranks fourth among the world export categories after fuel (petroleum, gas, coal), chemical products and food. This economic sector contributes 6% or 1,1 trillion dollars to the global goods and services exports and 30% of world exports of services. The Travel and Tourism sector provides nearly 277 million jobs that is 1 in 11 of all jobs [17].

In spite of serious periodic economic declines, indicators of global tourism demonstrated almost continuous increase throughout the World War II period. The United Nations World Tourism Organization (UNWTO) estimates that international tourism arrivals have increased at an average rate of over 5 per cent yearly from 25 million arrivals in 1950 to 1133 million arrivals in 2014 (Table 1) [16]. The number is predicted to achieve 1,4 billion by 2020 and 1,8 billion by 2030.

The number of international tourists exceeded the one billion in 2012, recording 1035 million arrivals.

In spite of global economic and political problems, the growth of the number of international tourists demonstrates at 4,9% increase with other 54 million arrivals in 2014, reaching 1133 million. According to the most recent United Nations WTO World Tourist Barometer report – this growth is largest in subregions like North America (9,2%), North-Eastern Asia (7,3%), South and Mediterranean Europe (6,9%), South Asia (6,8%), Caribbean (6,2%) [17].

USA Travel and Tourism: Current Trends in the Global Tourism Industry.

Key facts and figures. Tourism is one of the most important economic sectors of the USA, a significant factor of export potential of the American economy, an important area of job, a source of long-term development. The direct contribution of Travel and Tourism to GDP in 2014 was 458 billion dollars (2,6% of GDP) (table 2). This mainly includes the economic activity made by sectors such as hotels, airlines, travel agents, and other passenger transportation services. But as well it reflects, for instance, the activities of the restaurant and leisure industries directly supported [18].

Table 1

The development of international tourism (1950-2014)

Years	International Tourist Arrivals, Million	International Tourism Receipts, Billion U.S. dollars
1950	25	2
1960	69	7
1970	166	18
1980	277	104
1990	435	262
2000	674	476
2010	940	927
2014	1133	1245

Source: [16]

Table 2

Travel and Tourism's Contribution to GDP: Country Rankings, 2014

Country	Travel and Tourism's Direct Contribution to GDP, (billion U.S. \$)/% (share)	Country	Travel and Tourism's Total Contribution to GDP, (billion U.S. \$)/% (share)
United States	457,9/2,6	United States	1402,5/8
China	263,0/2,6	China	943,1/9,4
Germany	145,2/3,8	Germany	343,5/8,9
Japan	112,4/2,4	Japan	343,1/7,5
France	102,6/3,6	United Kingdom	309,8/10,5
United Kingdom	102,2/3,5	France	254,8/8,9

Source: [18]

The total contribution of tourism sector to gross domestic product including so called indirect contribution (administration, aviation, purchases of fuel by airlines, security services, promotion of tourism, cleaning services, etc) was 1402 billion dollars in 2014 or 8,0% of GDP.

Travel and Tourism generated 5,3 million jobs in 2014 (3,6% of total employment). It includes employment by hotels, travel agents, passenger transportation services, the activities of the restaurant and leisure industries directly supported by tourists etc. By 2025, tourism sector will account for 6,6 million workplaces directly, an increase of 2,1% per annum during the next ten years. In 2014, the total contribution of Travel and Tourism to employment, including jobs indirectly supported by the industry, was 9,3% of total employment or 13,652 million workplaces. This is estimated to increase by 2,1% yearly to 17,157 million jobs in 2025. Due to international tourism, American economy have 1,1 million jobs [3]. Money spent by foreign tourists to a country is a

core part of the direct contribution of Tourism industry. In 2014, United States generated 194 billion dollars in visitor exports. It represents about a quarter of total USA services exports and 7% of total exports [18].

USA as a travel destination. Visitors come to the USA to see natural wonders, small towns and large cities, historic landmarks, and entertainment and cultural sites.

As a tourism destination, no other country of the world can compete with the variety of impression found across the USA and its territories, with its natural beauty and outstanding cultural and historic sites. To preserve the sites of natural and cultural importance National Parks Service was founded in the USA in 1916. As of 2015, there were 407 official units of the National Park Service, which include parks, memorials, historical sites and rivers. Fifty nine of them are known as national parks. Ten national parks are in the World Heritage List of UNESCO from 23 World Heritage Sites that are located in the United States. The total number of visitors to

the sites of National Park Service reached approximately 293 million people in 2014 [11].

The Golden Gate Bridge recreational area was the most visited National Park Service site in 2014, accumulating over 15 million visits. The Great Smokey Mountains which is located in North Carolina and Tennessee, is one more most visited national park site. The park received around 10,1 million visits, more than twice as many as the Grand Canyon in Arizona [11].

Visitors to national parks are a valuable asset to the United States. In 2014, visitors to national parks spent around 15,7 billion dollars. This equated to a direct economic contribution of 7,6 billion dollars. In 2014, the highest share of national park visitor spending was on hotels, motels and B&B's (bed and breakfast: small lodging establishments that offers overnight accommodation), which accounted for 30,6%. Spending at restaurants and bars was the next largest share at 20,3 percent [11].

Theme park experiences are also an important tourist attraction in the USA. Disney Parks and Resorts is the largest and the most attended theme park company in the

world. Its revenues were more than 15 billion dollars in 2014. Approximately 134 million tourists visited Disney theme parks in 2014.

The diversity of landscapes, cultural and historic sites provides the development of different types of tourism and meets all the needs of American and international tourists. The USA hosted almost 75 million international tourists in 2014. It is 5 million more than in 2013 or 7% growth over 2013 (table 3). Total international arrivals increased nearly 25% from 2000. The United States of America is the second-most visited countries for foreign tourists, after France. Canada and Mexico are the main two markets for international tourists to the United States. In 2014, 23 million Canadians and 17,3 million Mexicans visited the United State. Because of growing Mexican middle class and due to intense cultural connections Mexico represents a short-term opportunity for growing travel to the USA. The United Kingdom (4,2 million), Japan (3,6 million), and Brazil (2,3 million) are also the important markets for international tourists to the United States.

Table 3

International tourism development in the USA and in the world

Years	International Tourist Arrivals, Million		International Tourist Arrivals, %		International Tourism Receipts, Billion US\$		International Tourism Receipts, %	
	World	USA	World	USA	World	USA	World	USA
1990	439,5	39,4	100	9,0	270	43	100	16,0
1995	540,6	43,5	100	8,0	410,7	63	100	15,3
2000	687	51,2	100	7,4	481,6	82	100	17,0
2005	806,8	49,4	100	6,1	682,7	87	100	12,7
2010	948	59,8	100	6,3	927	137	100	14,7
2014	1133	74,8	100	6,6	1245	177,2	100	14,2

Source: [17]

China, Germany, France, South Korea, and Australia rounded out the top ten inbound markets. The top 20 countries that provide the most international arrivals accounted for 88 percent of all international visits to the United States [4].

While in the United States, international visitors engage in a variety of activities: "A significant number of international travelers seek out nature- and culture-based experiences, such as visiting historic sites (40 percent of overseas travelers), cultural sites (23 percent) and national parks (20 percent)" [7].

The most visited American cities by foreign tourists are New York, Miami, Los Angeles, Orlando, San Francisco, Las Vegas, Honolulu, Washington, Chicago, and Boston. The most visited states are New York, Florida, California, Hawaii, Nevada, Texas, Illinois, and Massachusetts.

Foreign travelers stay on average more than 18 nights. According to World Tourism Organization data, the USA received nearly 14,2% of International Tourism Receipts, and accounted for 6,6% of global tourism arrivals in 2014 down from 17% and 7,4%, respectively, in 2000. Other traditional tourism countries such as France, Spain, Italy, Germany, Great Britain, and Canada also lost market share during this period. Global competition

for tourists is strong. In 1980, Europe and North America were the world's main tourist destinations, jointly representing more than 80% of the global market. That figure reduced to 60% by 2010, and may decrease to 50% by 2030 (table 4). Asian markets and emerging destinations like Hungary, Poland, and Morocco enhanced their market share significantly.

Many factors have caused a decrease of USA market share, including the increasing intra-regional travel (mainly in Asia and the Pacific tourism region), the growth popularity and openness of new global destinations, the introduction of low-cost regional airlines, currency instability, and the lack of a national promotion strategy for the United States in this intense competitive environment [10].

Global outbound tourism is also dynamically developing in the USA. In 2014 68,2 million of USA residents traveled abroad. The most visited countries by American tourists in 2014 were: Mexico (25,9 million) and Canada (11,5 million), United Kingdom (2,8 million), Dominican Republic (2,7 million), France (2,1 million), Italy (1,9 million), Germany (1,9 million), Jamaica (1,38 million), Spain (1,17 million), China (1,14 million) [8].

Though Canada, Mexico, and European countries are still the main destinations visited by USA residents,

the geography of the destinations have expanded by Africa, South and Central America and the Middle East.

Spending vacation or holiday is the most important purpose of the trip, which indicated almost 50% of Americans crossing the border in 2014. Visiting friends and relatives was the second-highest main trip purpose (27%). For 11% of American tourists the main reason for

the trip was business goals. At the entrance to the USA 22% of overseas visitors indicated this reason. Business tourists come to the United States to participate in meetings, conventions, and trade shows; to explore investment opportunities; and to purchase goods and services across the full spectrum of manufacturing and service sectors [8].

Table 4

The number of global tourist arrivals in WTO regions, %

Regions	1980	2014	2030
Europe	64,0	51,4	41,0
Africa	3,0	4,9	7,0
Middle East	3,0	4,5	8,0
Americas	22,0	16,0	14,0
Asia and the Pacific	8,0	23,2	30,0
World	100,0	100,0	100,0

Source: [17]

The average duration of trip (number of nights) outside the United States was 17 nights in 2014. Top leisure activities for the American travelers were visiting historical sites, sightseeing, shopping, experiencing cultural heritage sites, visiting small town or countryside, taking guided tours, visiting art galleries, museums, national parks, and monuments.

World Economic Forum's Travel and Tourism Competitiveness Index ranked the United States as the sixth-most competitive country among 140 nations in Travel and Tourism. Nevertheless the UNWTO predicts that the USA share of the global market for international tourism will continue to decrease as tourists visit other destinations [12]. In addition, outbound travel continues to lag when compared to other nations. Travel and Tourism from large emerging markets are expanding. For instance, in 2012, 83 million Chinese travelled abroad, compared with 10 million in 2000, according to UNWTO. By 2023, China is expected to overtake the United States of America as the world's largest tourist market in the total contribution that Travel and Tourism make to GDP, but it is expected to remain well behind the USA as a destination, both in terms of visitor exports and its share of global foreign arrivals, says the World Tourism and Travel Council [14]. The annual number of Indian outbound travelers is predicted to rise from around 15 million in 2012 to 50 million by 2020 [14].

Worried by this worsening situation, American government developed National Travel and Tourism Strategy [10]. This Strategy establishes an overarching goal of growing American jobs by attracting 100 million international visitors, who as is expected will spend \$250 billion, annually by the end of 2021 [10]. Americans are also encouraging to travel within the United States and its territories.

The USA Travel and Tourism advisory released a report recommending a nationally coordinated marketing and advertising campaign. The United States has initiated a promotion campaign to enhance international travel to the country, through the Corporation for Travel Promotion, doing business as Brand USA that operates

as a cooperative destination marketing organization. One of its first marketing efforts to promote the United States in international markets was establishment of the DiscoverAmerica.com website. Brand USA is now a public-private partnership with over 300 travel industry partners contributing services and cash to support its promotions and initiatives to build marketing relationships with international travel suppliers. The company encourages international travelers to visit the United States. It was founded in 2010 and is based in Washington. The company has offices in China, Hong Kong, Japan, Korea, Taiwan, the United Kingdom, Ireland, Germany, Austria, and Switzerland [10].

Among the tasks facing the government institutions is to review visa policies towards liberalization, but preserving the foundations of national security. Currently, more than 60% of the tourists who cross the borders of the United States does not require visa. All other international travelers must obtain a visa from a USA embassy to travel to the United States. About 29 percent of annual international travelers enter the United States with multiple-entry visas issued in prior years, while about 11% must get new visas. Canada and 36 other countries have Visa-free regime with the United States according to the Visa Waiver Program (VWP). Expanding the VWP is able to increase the number of the travelers [10].

One more question that is examined in the National Travel and Tourism Strategy is conducting research and measuring results: "The Federal government will work with the Travel and Tourism industry and academic researchers to conduct high quality research on Travel and Tourism issues and trends to inform public and private decision-making" [10, p. 5]. This is one more proof of the importance and timeliness of the research on the development of Travel and Tourism in the USA, including this investigation.

Conclusions. The Travel and Tourism industry has evolved over the past six decades into one of the world's most significant economic sectors. Travel and Tourism are critical to the American economy. This growing industry offers significant potential for job creation across all regions of the country. The United States leads the

world in revenues from international Travel and Tourism and ranks second in the number of international visitors. But the global travel market has become increasingly competitive. Other countries actively market themselves, and new destinations are aggressively competing for market share. Because of that the U.S. market share of

spending by international travelers has decreased and the government needs to work hard to support sectors of the economy such as the tourism industry. American experience is highly relevant for countries like Ukraine, which only seek their niche in the global tourism market.

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