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SALES OF U.S. TOURISM INDUSTRIES: FOURTH QUARTER 2002

Total U.S. tourism industry sales increased 4.6 percent (seasonally adjusted annual rate) to \$709.8 billion in the fourth quarter of 2002, according to preliminary estimates by the U.S. Bureau of Economic Analysis. Although tourism continues to recover from its fourth quarter 2001 trough, it remains well below its pre-September 11, 2001 peak. In the third quarter, tourism industry sales decreased 7.4 percent.

Direct tourism industry sales increased \$4.2 billion to \$380.8 billion. Direct tourism sales are sales by tourism industries to out-of-town visitors. Examples are sales by airlines and restaurants to leisure and business travelers. Direct sales of air transportation grew \$2.3 billion in the fourth quarter to \$91.6 billion, sales of eating and drinking places grew \$1.7 billion to \$63.8 billion, and sales of motion pictures and other entertainment grew \$1.2 billion to \$8.9 billion. Partly offsetting these increases were a decrease in sales of hotel and lodging places of \$0.6 billion to \$110.6 billion and a decrease in sales of automotive rental and leasing of \$1.1 billion to \$23.2 billion.

Indirect tourism industry sales increased \$3.8 billion to \$329.1 billion. Indirect tourism sales are sales to tourism industries by the industries that supply them. Examples are sales of fuel to airlines and food to restaurants.

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Year 2002

For the year 2002, total U.S. tourism industry sales decreased 0.5 percent to \$706.7 billion. Although tourism sales increased in three of the four quarters of 2002, high pre-September 11, 2001 sales mean that total 2001 sales exceed total sales in 2002. In 2001, tourism industry sales decreased 3.7 percent.

Direct tourism industry sales decreased \$1.8 billion to \$379.2 billion. Direct sales of air transportation fell \$11.0 billion to \$92.2 billion, and sales of travel agency services fell \$0.4 billion to \$3.8 billion. Offsetting these decreases were an increase in sales of eating and drinking places of \$3.2 billion to \$62.5 billion, an increase in sales of hotels and lodging places of \$1.3 billion to \$111.0 billion, and an increase in sales of automobile renting and leasing of \$1.9 billion to \$23.5 billion.

Indirect tourism industry sales decreased \$1.4 billion to \$327.5 billion. The largest of these industries include food and kindred products, petroleum refining and related products, and business and professional services.

Tourism industries are those identified in BEA's Travel and Tourism Satellite Accounts (TTSA) as industries whose primary products are typically purchased by out-of-town visitors. Visitors are people whose travel for pleasure or business takes them 50 miles or more away from home, or outside of their usual environment. The definitions, framework, and estimating methods used for the U.S. TTSA's follow, as closely as practicable, the guidelines for similar accounts that were developed by the World Tourism Organization (WTO) and the Organisation for Economic Co-operation and Development (OECD).

BEA's estimates of U.S. tourism industry sales include figures for both direct and indirect sales. Direct tourism sales are sales by tourism industries to out-of-town visitors. Indirect tourism sales are sales to tourism industries by the industries that supply them. Indirect sales were estimated using industry-by-industry total requirements coefficients from BEA's input-output accounts.

Further information on BEA's TTSA and analyses of previous quarters are available on BEA's Web site. Go to <www.bea.gov>, click on "GDP by industry and input-output data," and look under "Satellite Accounts -- Tourism." With the support of the U.S. Department of Commerce's International Trade Administration, BEA's first TTSA's were published in the July 1998 Survey of Current Business. In late 2001, BEA began producing prototype quarterly estimates of tourism industry sales. Henceforth, BEA will publish these estimates on a regular basis, approximately two weeks following the release of BEA's preliminary estimates of GDP - - June 12, 2003, September 12, 2003, and December 10, 2003.

BEA's major national, international, regional, and industry estimates; the Survey of Current Business; and BEA news releases are available without charge on BEA's Web site:

<www.bea.gov>

Summary BEA estimates are available on recorded messages at the time of public release at the following telephone numbers:

(202) 606-5306 Gross domestic product
606-5303 Personal income and outlays
606-5362 U.S. international transactions

Most of BEA's estimates and analyses appear in the Survey of Current Business, BEA's monthly journal. Subscriptions and single copies of the printed Survey are for sale by the Superintendent of Documents, U.S. Government Printing Office. Internet: <bookstore.gpo.gov>; phone: 202-512-1800; fax: 202-512-2250; mail: Stop SSOP, Washington, DC 20402-0001.

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Next release – Sales of U.S. Tourism Industries for First Quarter 2003 will be released on June 12, 2003 at 10:30 A.M. EST.

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Table 1. -- Total (Direct & Indirect) Tourism-related Sales of Tourism Industries
Percent Change from Preceding Period

Tourism Industry			Seasonally adjusted at annual rates						
	Y2001	Y2002	Q2001: II	Q2001: III	Q2001: IV	Q2002: I	Q2002: II	Q2002: III	Q2002: IV
Hotels and lodging places	-4.6	1.2	-7.4	-23.5	-13.5	27.4	16.2	-7.2	-2.0
Eating and drinking places	4.4	5.5	0.0	2.2	3.3	14.3	2.4	-0.3	11.3
Railroads and related services	8.0	1.0	2.3	6.0	32.7	5.5	-8.3	-31.4	-3.6
Local and bus passenger transit	-6.6	-7.9	-8.1	-5.1	-13.6	-4.5	-6.6	-8.3	-11.4
Taxicabs	2.9	3.4	3.1	5.4	2.6	2.6	5.2	2.0	2.1
Air transportation	-13.1	-10.6	-15.2	-46.7	-44.6	53.5	8.0	-21.2	10.6
Water transportation	7.7	8.1	9.7	5.1	10.6	5.2	10.0	8.8	10.0
Automotive rental and leasing	1.6	9.0	-4.3	-18.6	3.8	39.9	13.7	8.9	-16.6
Travel agency services	-8.5	-9.5	-10.9	-4.5	-14.7	-9.2	-4.4	-13.4	-10.1
Amusement and recreation services	6.5	3.7	4.1	-0.8	-0.9	3.6	7.2	9.4	5.1
Membership sports and recreation clubs	3.1	2.8	4.6	5.0	3.3	3.4	2.1	0.5	-0.1
Motion pictures and other entertainment	9.5	7.1	15.1	-9.0	57.8	-13.9	20.4	-31.2	74.7
Professional sports clubs and promoters	6.4	5.4	17.4	-28.9	54.5	-7.4	8.0	8.2	-1.1
Gasoline service stations	-1.4	-2.2	21.7	-24.4	-42.9	0.3	62.7	7.1	9.1
Retail excluding restaurants and gas stations	3.8	3.8	1.3	2.5	5.0	7.4	0.6	1.6	4.7
Percent change at annual rate	-3.7	-0.5	-6.1	-23.0	-15.7	25.0	9.4	-7.4	4.6

Source: U.S. Bureau of Economic Analysis

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Table 2. -- Direct Tourism-related Sales of Tourism Industries
[Billions of dollars]

Tourism Industry				Seasonally adjusted at annual rates							
	Y2000	Y2001	Y2002	Q2001: I	Q2001: II	Q2001: III	Q2001: IV	Q2002: I	Q2002: II	Q2002: III	Q2002: IV
Hotels and lodging places	115.0	109.7	111.0	116.0	113.8	106.4	102.6	109.1	113.2	111.1	110.6
Eating and drinking places	56.7	59.2	62.5	58.9	59.0	59.3	59.8	61.8	62.2	62.1	63.8
Railroads and related services	1.3	1.4	1.4	1.3	1.4	1.4	1.5	1.5	1.5	1.3	1.3
Local and bus passenger transit	2.9	2.7	2.5	2.8	2.8	2.7	2.6	2.6	2.6	2.5	2.4
Taxicabs	4.6	4.8	4.9	4.7	4.7	4.8	4.8	4.9	4.9	4.9	5.0
Air transportation	118.8	103.2	92.2	118.1	113.4	96.9	83.6	93.0	94.8	89.3	91.6
Water transportation	7.8	8.4	9.0	8.1	8.3	8.4	8.6	8.7	8.9	9.1	9.3
Automotive rental and leasing	21.3	21.6	23.5	22.3	22.0	20.9	21.1	23.0	23.7	24.3	23.2
Travel agency services	4.6	4.2	3.8	4.3	4.2	4.2	4.0	3.9	3.9	3.7	3.6
Amusement and recreation services	15.2	16.2	16.8	16.1	16.2	16.2	16.2	16.3	16.6	17.0	17.2
Membership sports and recreation clubs	5.9	6.1	6.2	6.0	6.0	6.1	6.2	6.2	6.3	6.3	6.3
Motion pictures and other entertainment	7.1	7.8	8.3	7.5	7.7	7.5	8.4	8.1	8.5	7.8	8.9
Professional sports clubs and promoters	1.8	1.9	2.0	1.9	1.9	1.8	2.0	2.0	2.0	2.0	2.0
Gasoline service stations	3.2	3.2	3.1	3.3	3.4	3.2	2.8	2.8	3.2	3.2	3.3
Retail excluding restaurants and gas stations	29.6	30.7	31.9	30.4	30.5	30.7	31.1	31.7	31.7	31.8	32.2
<i>All tourism industries</i>	395.7	381.0	379.2	401.8	395.5	370.6	355.3	375.5	383.9	376.6	380.8

Source: U.S. Bureau of Economic Analysis

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Table 3. -- Total (Direct & Indirect) Tourism-related Sales of Tourism Industries
[Billions of dollars]

Tourism Industry				Seasonally adjusted at annual rates							
	Y2000	Y2001	Y2002	Q2001: I	Q2001: II	Q2001: III	Q2001: IV	Q2002: I	Q2002: II	Q2002: III	Q2002: IV
Hotels and lodging places	205.8	196.4	198.7	207.6	203.7	190.5	183.7	195.2	202.7	198.9	197.9
Eating and drinking places	116.8	122.0	128.7	121.4	121.4	122.1	123.1	127.3	128.1	128.0	131.4
Railroads and related services	2.3	2.4	2.5	2.4	2.4	2.4	2.6	2.6	2.6	2.3	2.3
Local and bus passenger transit	5.2	4.8	4.4	5.0	4.9	4.8	4.6	4.6	4.5	4.4	4.3
Taxicabs	8.1	8.4	8.7	8.3	8.3	8.4	8.5	8.6	8.7	8.7	8.7
Air transportation	224.6	195.0	174.3	223.2	214.3	183.1	157.9	175.8	179.2	168.9	173.2
Water transportation	16.6	17.9	19.3	17.3	17.7	18.0	18.4	18.7	19.1	19.5	20.0
Automotive rental and leasing	42.1	42.8	46.6	44.1	43.6	41.5	41.9	45.5	47.0	48.0	45.9
Travel agency services	8.0	7.3	6.7	7.6	7.4	7.3	7.0	6.9	6.8	6.6	6.4
Amusement and recreation services	26.6	28.3	29.4	28.1	28.4	28.4	28.3	28.6	29.1	29.7	30.1
Membership sports and recreation clubs	10.3	10.6	10.9	10.5	10.6	10.7	10.8	10.9	10.9	11.0	11.0
Motion pictures and other entertainment	12.5	13.6	14.6	13.0	13.5	13.2	14.8	14.2	14.9	13.6	15.6
Professional sports clubs and promoters	3.1	3.3	3.5	3.3	3.4	3.1	3.5	3.4	3.5	3.6	3.6
Gasoline service stations	9.1	9.0	8.8	9.3	9.7	9.1	7.9	7.9	8.9	9.1	9.3
Retail excluding restaurants and gas stations	46.2	47.9	49.7	47.5	47.6	47.9	48.5	49.4	49.5	49.7	50.3
<i>All tourism industries</i>	737.2	709.9	706.7	748.7	737.1	690.5	661.6	699.5	715.4	701.8	709.8

Source: U.S. Bureau of Economic Analysis