



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

## Industry & Analysis

# The Contribution of U.S. Based Inbound Travel Trade Operators on International Travel to the United States



## Impact of U.S.-Based Inbound Travel Trade Operators on International Travel to the United States

This report by the National Travel and Tourism Office (NTTO), part of the International Trade Administration's (ITA) Industry and Analysis (I&A) business unit, at the U.S. Department of Commerce measures the impact of inbound international visitors to the United States engaged with U.S. based travel trade operators (tour operators, travel agents, etc.). Inbound international visitors include total overseas visitors, and Canadian and Mexican air travelers to the United States (Canadian and Mexican visitors by land are not included). The impact estimates include the number of visitors, travel spending in the United States, as well as the U.S. jobs supported by the spending.

### Total International Inbound Visitors (total overseas, Canadian and Mexican air travelers)

According to NTTO's estimate, (see Table 1), travel trade operators facilitated and contributed to about a quarter of the total impact of international visitors travel to the United States in 2023, including:

- 10.3 million visitors (23 percent of the total), up 35 percent from the previous year
- \$52.8 billion in travel spending (26 percent of the total), up 42 percent from the previous year
- Supported 387,000 U.S. jobs (25 percent of the total), up 28 percent from the previous year

To measure the recovery of travel trade operators-engaged international visitation to the United States following the decline caused by the COVID-19 pandemic, estimates have also been made to establish a 2019 baseline. As of 2023, total international visitors to the United States engaged with tour operators and travel agents have rebounded to 70 percent of the pre-pandemic 2019 level, while travel spending in the United States has risen to nearly 83 percent of its pre-pandemic level.

### Overseas Inbound Visitors (excluding Canadian and Mexican air travelers)

Overseas visitors constituted a major proportion of the impact of total international visitors facilitated by travel trade operators. Travel trade operators facilitated and contributed higher proportions of overseas visitors to the United States compared to the proportion facilitated for Canadian and Mexican air travelers (see Table 2). In 2023, travel trade operators supported:

- 8.6 million visitors (27 percent of the total), up 37 percent from the previous year
- \$49.9 billion in travel spending (28 percent of the total), up 44 percent from the previous year
- 368,100 U.S. jobs (26 percent of the total), up 29 percent from the previous year

Overseas visitors to the United States facilitated by travel trade operators in 2023 rebounded to 65 percent of the pre-pandemic 2019 level, while the travel spending in the United States achieved nearly 82 percent of its pre-pandemic level.

### Data and definitions

The measurements of visitor arrivals and characteristics are derived through NTTO's ADIS I-94 International Visitor Arrivals Program and the Survey of International Air Travelers (SIAT). The Bureau of Economic Analysis' Industry Economic Accounts and International Trade in Goods and Services statistics are used in the estimates of visitors' spending and jobs supported.



International visitors engaged with tour operators and travel agents are defined as:

- Visitors who used package tours for a U.S. trip.
- Visitors who did not use a package tour to visit the United States but booked airline reservations through tour operators/travel agents, including visitors who also booked hotel/lodging before they left their home countries through tour operator/travel agents.

**Table 1. Impact on the U.S. Economy by Overseas Visitors, and Canadian, and Mexican Air Travelers Engaged with Tour Operators and Travel Agents**

2023	Overseas, Canada and Mexico Inbound Arrivals by Air	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	45,054,715	10,292,070	22.8%
Spending (\$ Billions)	\$201.4	\$52.8	26.2%
Jobs Supported*	1,570,800	387,000	24.6%

*\*Direct and indirect jobs*

2022	Overseas, Canada and Mexico Inbound Arrivals by Air	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	33,669,637	7,628,526	22.7%
Spending (\$ Billions)	\$152.5	\$37.2	24.4%
Jobs Supported*	1,218,000	302,300	24.8%

*\*Direct and indirect jobs*

2019	Overseas, Canada and Mexico Inbound Arrivals by Air	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	52,203,108	14,783,752	28.3%
Spending (\$ Billions)	\$218.6	\$63.8	29.2%
Jobs Supported*	1,929,300	553,800	28.7%

*\*Direct and indirect jobs*





**Table 2. Impact on the U.S. Economy by Overseas Visitors Engaged with Tour Operators and Travel Agents (excluding Canadian and Mexican air travelers)**

2023	Total Overseas Inbound	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	31,468,481	8,583,573	27.3%
Spending (\$ Billions)	\$180.4	\$49.9	27.7%
Jobs Supported*	1,435,600	368,100	25.6%

*\*Direct and indirect jobs*

2022	Total Overseas Inbound	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	23,952,957	6,273,918	26.2%
Spending (\$ Billions)	\$135.3	\$34.7	25.7%
Jobs Supported*	1,128,100	285,500	25.3%

*\*Direct and indirect jobs*

2019	Total Overseas Inbound	Engaged With Tour Operator/Travel Agents	Share of Total
Visitors	40,393,346	13,212,344	32.7%
Spending (\$ Billions)	\$199.4	\$61.2	30.7%
Jobs Supported*	1,785,100	532,000	29.8%

*\*Direct and indirect jobs*

\*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).