



CHAPTER 4

Transportation and the Economy

The Nation's transportation system makes possible the efficient movement of both people and goods throughout the country and internationally. As discussed in chapter 1, transportation assets, totaling \$7 trillion in 2010, are a major underpinning of our Nation's wealth and our prosperity. Besides facilitating activity in all segments of the economy, the for-hire transportation sector directly employs over 4 million people, generates revenues through taxes and user fees, and invests in infrastructure and equipment needed to move people and goods. Beyond its contribution toward development of the Nation's gross domestic product (GDP), transportation is also an important element in both household and government budgets. The average household spends nearly \$8,000 per year on transportation, while the public sector spends about \$800 per capita on transportation expenditures.

- Personal, business, and government purchases of transportation goods and services account for nearly 8.7 percent of U.S. Gross Domestic Product.
- Transportation and related sectors employed over 11 million workers in 2011, representing nearly 8.7 percent of the Nation's labor force.
- American households spend, on average, over \$8,000 per year on transportation, representing nearly 16.7 percent of household expenditures. Transportation expenditure is the second largest household spending category, next to housing.
- The transportation revenues of Federal, state and local governments totaled \$156 billion in 2009, while government transportation expenditures totaled \$243 billion – a deficit of \$87 billion, up from \$50 billion in 1995.

Transportation and U.S. Gross Domestic Product

Transportation is both a part of the economic output of the economy and a contributor to that economic output. The nation's economic output, measured as GDP, included near \$1.5 trillion in personal consumption, private domestic investment, government purchases, and exports related to transportation goods and services in 2011 (measured in 2005 chained dollars). After subtracting \$334 billion in transportation-related imports, transportation accounted for 8.7 percent of U.S. GDP (table 4-1).

When the effects of inflation are removed, spending on transportation in 2011 as a part of

final demand is up 16.9 percent from 1995 but down 4.1 percent since 2000. Many of these changes are due to personal consumption of transportation and private domestic investment in transportation equipment, both of which were growing through the 1990s but suffered significant declines during the recent recession. While both categories have rebounded since 2009, neither has returned to levels achieved through years of growth.

Transportation is also a contributor to economic output, making possible the production and sale of nearly everything made in the nation. For-hire transportation contributes \$448 billion (3.0 percent) to U.S. GDP when the goods and services consumed by for-hire transportation

TABLE 4-1 U.S. Gross Domestic Product Attributed to Transportation-Related Final Demand 1995, 2000, 2008–2011
Chained 2005 dollars, billions

	1995	2000	2008	2009	2010	2011
U.S. Gross Domestic Product (GDP), total	9,086	11,216	13,162	12,758	13,063	13,299
Transportation's share of GDP (percent)	10.9	10.8	8.9	8.6	8.6	8.7
Domestic transportation-related final demand, total	994	1,212	1,176	1,102	1,121	1,163
Personal consumption of transportation, total	703	904	884	833	838	854
Motor vehicles and parts	256	356	347	323	330	347
Motor vehicle fuels, lubricants, and fluids	234	261	265	264	265	257
Transportation services	214	286	272	246	244	249
Gross private domestic investment, total	137	194	152	77	129	165
Transportation structures	6	8	9	8	9	9
Transportation equipment	132	186	143	69	120	157
Government transportation-related purchases, total	197	223	228	235	236	226
Federal purchases	22	23	31	32	34	34
State and local purchases	163	189	179	183	181	173
Defense-related purchases	12	11	18	21	22	19
Transportation-related Exports (+), total	163	205	246	199	227	251
Transportation-related Imports (-), total	-207	-314	-334	-242	-308	-334

NOTES: Total domestic transportation-related final demand is the sum of total personal consumption of transportation, total gross private domestic investment, net exports of transportation-related goods and services, and total government transportation-related purchases. Defense-related purchases are the sum of the transportation of material and travel.

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, *National Income and Product Accounts Tables*, tables 1.1.6, 2.3.6, 2.4.6, 3.11.6, 3.15.6, 4.2.6, 5.4.6, and 5.5.6, available at <http://www.bea.gov/national/nipaweb/SelectTable.asp?Selected=N#S2> as of November 2012 as reported in U.S. Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics, *National Transportation Statistics*, table 3-4, available at http://www.rita.dot.gov/bts/sites/rita.dot.gov/bts/files/publications/national_transportation_statistics/index.html as of January 2013.

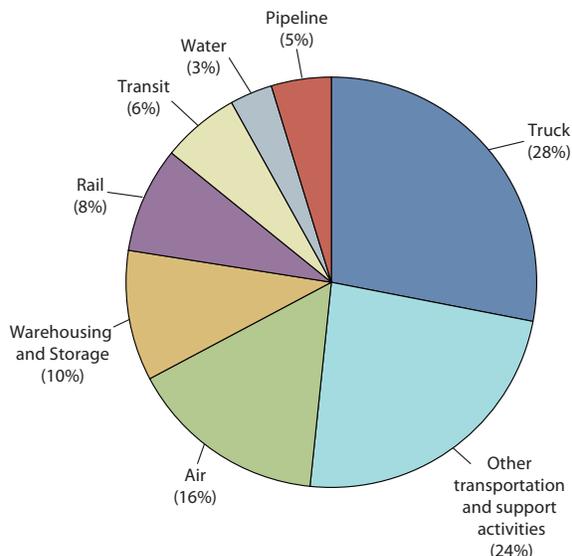
are netted out to avoid double counting. Nearly one-third of this contribution is made by for-hire trucking, with the next largest share coming from commercial aviation (figure 4-1).

Many nontransportation industries provide transportation services for their own use, called in-house transportation, such as trucking services operated for a grocery store chain or a construction company. The contribution of in-house transportation services to the economy had not been separately broken out until the Transportation Satellite Accounts were developed jointly by the Bureau of Transportation Statistics (BTS) and the Bureau of Economic Analysis (BEA). In 1997, the latest year for which estimates are available, in-house transportation accounted for approximately one-third of the total value added by both for-hire and in-house transportation services to the U.S. economy [USDOT RITA BTS 2011]. Based on the 1:3 ratio established in 1997, in-house transportation likely contributed about one-third, or about \$175 billion, of the more than \$500 billion estimated as the combined contribution of both for-hire and in-house transportation to the economy in 2010 [USDOT RITA BTS 2011].

Transportation and Trade

An efficient and reliable domestic transportation system with good connections to the international transportation network allows U.S. businesses to compete for customers in the global marketplace and to connect domestic manufacturers with distant sources of raw materials and other inputs to produce goods.

FIGURE 4-1 Modal For-hire Transportation Services Contribution to U.S. Gross Domestic Product (GDP): 2011



SOURCES: U.S. Department of Commerce, Bureau of Economic Analysis, Industry Economic Accounts, as cited in the U.S. Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics, *National Transportation Statistics*, table 3-1, available at http://www.rita.dot.gov/bts/sites/rita.dot.gov/bts/files/publications/national_transportation_statistics/index.html as of March 2013.

The transportation industry moves trade goods and provides international transportation services. U.S. international trade grew faster than the economy as a whole over the past 20 years. Between 1990 and 2010, the value of U.S. international trade tripled and GDP nearly doubled [USDOT BEA NIPA] while at the same time household income increased by only 2 percent [USDOT Census 2011]. As a share of GDP, U.S. merchandise trade, which includes goods but not services, grew from about 16 percent in 1990 to 22 percent in 2010 [USDOT Census FTD Annual Issues]. Canada, China, and Mexico are the top trading partners in merchandise trade for the United States, as discussed in chapter 3.

The growth in international trade is driven, in large part, by U.S. demand for imported goods. Since the 1970s, the United States has annually imported more goods than it has exported. The 2011 goods deficit (\$726 billion) was the highest since 2008 (\$816 billion). The 2011 services surplus (\$179 billion) was the highest on record. The imports of automobiles (\$254 billion) were the highest since 2007 (\$257 billion), outpacing automobile exports (\$133 billion) in 2011 [USDOC Census Foreign Trade].

Transportation-Related Employment and Productivity

Beyond the direct and indirect value provided by the transportation sector, it is a significant employer in the United States. In 2011, about 4.3 million people worked in the for-hire transportation sector, with trucking accounting for 30 percent of that total (table 4-2). Employment in many for-hire transportation industries has grown or remained steady since 1995, while employment in air, railroads, and pipe-

TABLE 4-2 Employment in For-Hire Transportation and Selected Transportation-Related Industries: 1995, 2000, and 2008–2011^a

Thousands

	1995	2000	2008	2009	2010	2011
TOTAL U.S. labor force	117,298	131,785	136,790	130,807	129,874	131,359
TOTAL transportation and related labor force	12,705	13,907	13,212	12,234	12,086	11,381
Transportation and related as a share of Total U.S. labor force	10.8%	10.6%	9.7%	9.4%	9.3%	8.7%
For-Hire Transportation and warehousing	3,838	4,410	4,508	4,236	4,191	4,292
Air transportation	511	614	491	463	458	456
Rail transportation	233	232	231	218	216	229
Water transportation	51	56	67	63	62	63
Truck transportation	1,249	1,406	1,389	1,268	1,250	1,299
Transit and ground passenger transportation	328	372	423	422	430	436
Pipeline transportation	54	46	42	43	42	43
Scenic and sightseeing transportation	22	28	28	28	27	29
Support activities for transportation	430	537	592	549	543	564
Couriers and messengers	517	605	573	546	528	529
Warehousing and storage	444	514	672	637	633	646
Transportation-related manufacturing, total^b	2,391	2,447	1,965	1,669	1,646	1,684
Other transportation-related industries, total	4,727	5,297	5,097	4,723	4,680	4,774
Postal service, total	850	880	747	703	659	631
Government employment, total^c	899	873	895	902	911	U

^a Annual averages. ^b Includes transportation equipment; petroleum products; tires; rubber; plastics; search, detection, navigation, guidance, aeronautical, and nautical systems; and instrument manufacturing. ^c Fiscal year data. Includes USDOT and state and local personnel. State and local component of government employment includes highway, air, transit, and water modes.

KEY: U = unavailable.

NOTE: Details may not add to totals due to independent rounding.

SOURCES: U.S. Department of Labor, Bureau of Labor Statistics; U.S. Census Bureau; and U.S. Department of Transportation, as cited in the U.S. Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics, *National Transportation Statistics*, table 3-23, available at http://www.rita.dot.gov/bts/sites/rita.dot.gov/bts/files/publications/national_transportation_statistics/index.html as of January 2013.

lines has declined [USDOL BLS CES]. The employment decline in these three industries is due partly to productivity improvements and, in the case of railroads and airlines, mergers and discontinuance of unprofitable lines and services.

Employment in transportation is not limited to carriers and warehousing. Millions more work in vehicle sales and repairs, vehicle and equipment manufacturing, and a host of other businesses with transportation-related functions. Including jobs from these various industries, transportation-related employment accounted for about 8.7 percent of civilian workers in 2011 (see table 4-2).

Employment by transportation occupation versus industry provides a different perspective. For example, a for-hire transportation company employs people in a variety of occupations, from the chief executive's office to the loading dock—all of which, by association, are in transportation industries. Workers in transportation occupations are also found in other industries. In 2011, there were approximately 2.7 million people employed as truck drivers in the United States, many of them working for companies whose business focus is non-transportation related, but nevertheless rely on transportation to function, such as grocery chains with in-house truck fleets (table 4-3).

Productivity, measured by output per hour worked, is an important indicator of economic growth and health. Improvement in productivity helps the United States maintain its international competitiveness despite having

higher wages, fuel costs, and other transportation expenditures. Although labor productivity for the transportation sector as a whole is not available, the Bureau of Labor Statistics (BLS) reports labor productivity for several for-hire transportation industries: air, line-haul railroads, general (long distance) freight trucking, and postal services (figure 4-2). Air transportation and line-haul railroads doubled productivity between 1990 and 2010 from divestiture of unprofitable lines and other efficiency improvements.¹ Air carriers improved productivity, as measured by the number of available seat-miles flown per gallon of fuel, and fuel efficiency, as measured by the number of gallons consumed per block hour [USDOT RITA BTS 2012b]. Over the same period, postal service productivity improved by 19.5 percent and general freight trucking by 28.9 percent. In comparison, overall business productivity increased by 43.9 percent. The relatively low increase for freight trucking may be due to increasing quality-of-service demands by shippers and the public.

Household Expenditures on Transportation

In 2011, the average household expenditure on transportation was \$8,293. This translates to almost 16.7 percent of average household expenditures, the second largest household expenditure (figure 4-3). In comparison, households spent more than twice that amount on housing. On average, rural households spent

¹ Prior to 2009, all air transportation workers were considered full time. BLS revised its data beginning in 2009 to include both full-time and part-time workers.

TABLE 4-3 Employment in Selected Freight Transportation and Freight Transportation-Related Occupations: 2000 and 2008–2011

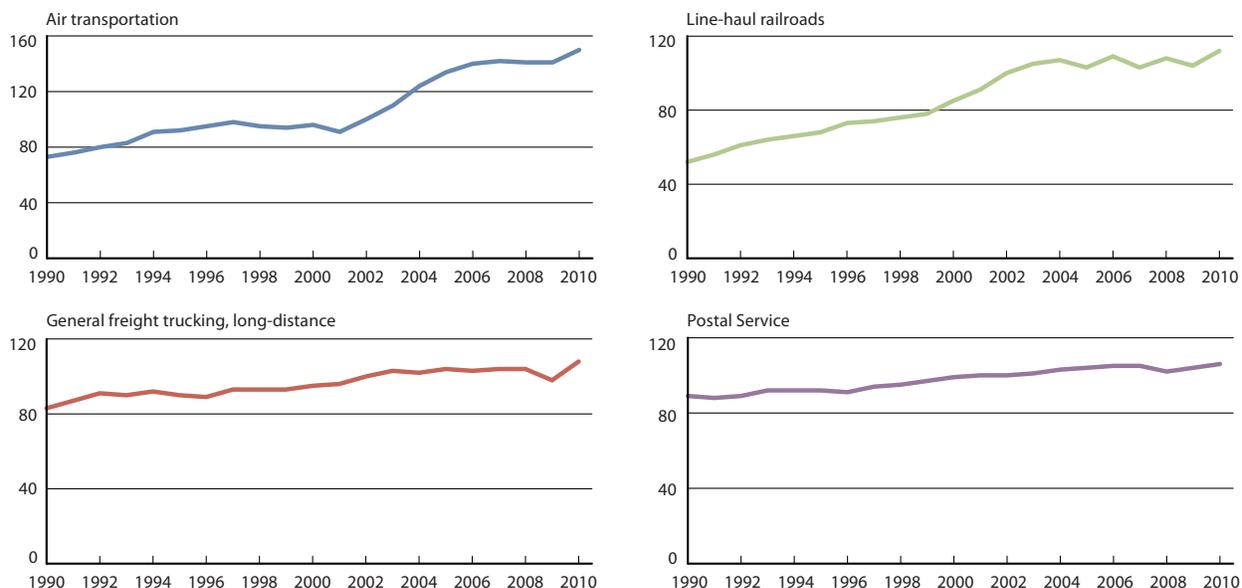
Thousands

Occupation (SOC code)	2000	2008	2009	2010	2011
Vehicle operators, pipeline operators, and primary support	3,158	3,159	2,956	2,818	2,871
Driver/sales worker (53-3031)	374	373	363	372	388
Truck drivers, heavy and tractor-trailer (53-3032)	1,577	1,673	1,551	1,467	1,509
Truck drivers, light or delivery services (53-3033)	1,033	909	835	780	771
Locomotive engineers (53-4011)	29	43	44	41	39
Rail yard engineers, dinkey operators, and hostlers (53-4013)	4	5	5	6	5
Railroad brake, signal, and switch operators (53-4021)	17	25	24	23	24
Railroad conductors and yardmasters (53-4031)	40	40	42	43	44
Sailors and marine oilers (53-5011)	30	32	32	32	31
Captains, mates, and pilots of water vessels (53-5021)	21	31	30	29	30
Ship engineers (53-5031)	7	11	11	9	10
Bridge and lock tenders (53-6011)	5	4	4	3	3
Gas compressor and gas pumping station operators (53-7071)	7	4	4	4	4
Pump operators, except wellhead pumpers (53-7072)	14	9	10	9	12
Transportation equipment manufacturing and maintenance occupations	269	269	254	242	242
Bus and truck mechanics and diesel engine specialists (49-3031)	259	249	233	223	223
Rail car repairers (49-3043)	11	21	21	19	19
Transportation infrastructure construction and maintenance occupations	19	24	23	25	25
Rail-track laying and maintenance equipment operators (47-4061)	10	15	15	16	16
Signal and track switch repairers (49-9097)	6	7	6	7	8
Dredge operators (53-7031)	3	2	2	2	2
Secondary support service occupations	1,431	1,346	1,275	1,228	1,221
Dispatchers, except police, fire, and ambulance (43-5032)	167	193	185	181	182
Postal service mail carriers (43-5052)	355	355	339	325	315
Shipping, receiving, and traffic clerks (43-5071)	865	761	715	688	688
Transportation inspectors (53-6051)	27	25	24	24	25
Tank car, truck, and ship loaders (53-7121)	17	12	12	10	11

KEY: SOC = Standard Occupational Classification.**SOURCE:** U.S. Department of Labor, Bureau of Labor Statistics, *Occupational Employment and Wages, 2011*, available at www.bls.gov/oes as of July 2012.

FIGURE 4-2 Labor Productivity Indices for Selected Transportation Industries: 1990–2010

Index, 2002 = 100



NOTES: Bureau of Labor Statistics developed labor productivity indexes for all manufacturing and retail trade of the North American Industry Classification System (NAICS) industries as well as selected mining, transportation, communications and services industries. Data in this table are not comparable to the data published in previous editions of the report due to change in base year of the index from 1997 to 2002.

SOURCES: U.S. Department of Labor, Bureau of Labor Statistics, *Industry Productivity and Costs*, available at <http://www.bls.gov/data/> as of January 2011.

more on transportation (\$9,517) than urban households (\$7,990). This difference is driven, in part, by longer trips in rural areas and greater use of public transportation in urban households [USDOL BLS CEX].

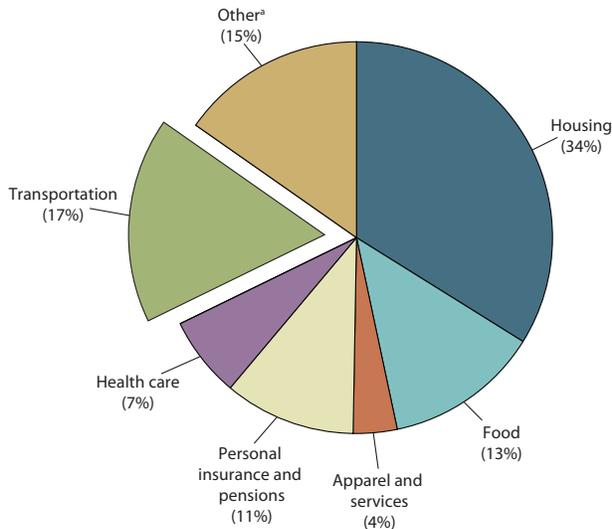
The lion’s share of household transportation expenditures went to the purchase and upkeep of vehicles (93.8 percent), including the cost of gasoline. After generally holding steady from 1994 to 1999, gasoline and diesel prices have nearly tripled since 2000. As shown in figure 4-4, prices increased from \$1.29/gallon for regular gasoline in January 2000 to a monthly average price of \$3.63/gallon in 2012 [USDOE

EIA 2012].² These increases have caught the attention of consumers who have responded by driving less to reduce fuel use, using more efficient vehicles, or both. Spending on all modes of purchased transportation accounted for the remaining 6.2 percent of household transportation spending in 2011.³ Airline fares were the largest purchased transportation expenditure (among those who fly), followed by mass

² After peaking in early 2012, gasoline prices started to decline in mid-year, before dropping below \$3.00/gallon in some markets in December.

³ The Bureau of Labor Statistics refers to for-hire and other services available to the public as public transportation (in contrast to private transportation). This should not be confused with public transportation such as government-provided transit.

FIGURE 4-3 Average Household Expenditures by Major Spending Category: 2011



*Includes alcoholic beverages, entertainment, personal care products and services, reading, education, tobacco products and smoking, miscellaneous, and others.

NOTES: Individual categories may not sum to total due to rounding.

SOURCES: U.S. Department of Labor, Bureau of Labor Statistics, *Consumer Expenditure Survey*, 2011, personal communication, September 2012.

transit, a distant second [USDOT RITA BTS 2012a]. However, only about one-third of all individuals fly in a one-year period.

Over the last 20 years, the costs of owning a car have kept pace with the 67 percent increase in the Consumer Price Index (CPI). According to the CPI, the cost of owning and operating a personal vehicle grew by 60 percent. As components of owning a car, automobile insurance and maintenance costs doubled while the cost of parts remained about the same. In addition, the CPI notes the cost of public transportation exceed the overall price increase, given that

public transportation costs doubled during the 1990-2010 period [USDOL BLS CPI].⁴

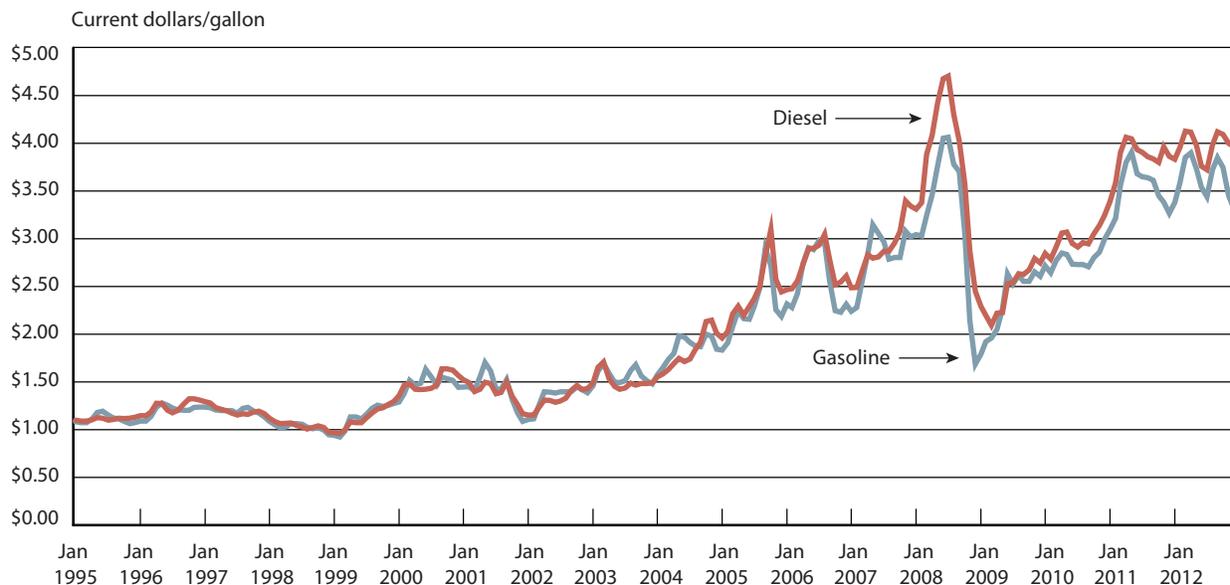
Public- and Private-Sector Spending on Transportation

Federal, state, and local governments spent approximately 4 percent (\$243 billion) of their expenditures on transportation in 2009, according to the *Government Transportation Financial Statistics 2012* report produced by BTS. The same report calculates per capita government spending on transportation at about \$800 per year [USDOT RITA BTS 2012a]. These expenditures are used, among other things, to build, operate, and maintain publicly owned transportation facilities, implement public policy in such areas as safety and security, and undertake many other activities.

In 2009, the latest year for which comprehensive data have been published, governments spent \$243 billion on transportation, with state and local governments spending 82.4% of that total (table 4-4). Government transportation expenditures more than doubled between 1995 and 2009. Nearly 50.8 percent of government expenditures went to highways, followed by transit (22.4 percent), air (19.7 percent), and water (5.7 percent).

The public sector is the major funding source for transportation infrastructure construction in the United States. In 2010, the value of gov-

⁴ Public transportation costs include fares for airlines, intercity bus, intercity train, ship, and intracity transportation (intracity mass transit) in the Consumer Price Index.

FIGURE 4-4 Gasoline and Diesel Retail Price: January 1995–December 2012


SOURCES: U.S. Department of Energy, Energy Information Agency, U.S. Petroleum Prices, available at www.eia.doe.gov as of January 2013.

ernment-funded construction underway was \$108 billion, approximately one-third more than the 2005 figure of \$79 billion (see table 1-2 in chapter 1). Approximately three-fourths of this public investment was for highways; the remainder supported such construction as airport terminals and runways, transit facilities, water transportation facilities, and pedestrian and bicycling infrastructure.

During this same period, the private sector also substantially increased spending on transportation construction, but from a much lower level of initial spending. In 2005, the value put in place by private construction was \$7 billion; rising by more than 40 percent to nearly \$10 billion in 2010. Most of this outlay was for rail projects, with spending increasing more than 50 percent between 2005 and 2010. Private spending for air transportation construction declined

during this period [USDOC Census Construction Spending].

Transportation-Related Revenues

Public dollars spent on transportation come from user taxes and fees, such as gasoline taxes and tolls, air ticket taxes and fees, and general revenues. In 2009, the latest year for which data from all levels of government have been assembled, government transportation revenues from all sources totaled \$156 billion (current dollars). State and local governments collected 67.9 percent of all transportation-related revenues, while the Federal Government collected the balance. As shown in table 4-5, the highway sector generated the greatest revenues (mainly from gas taxes), accounting for \$104 billion (67.0 percent), followed by air,

TABLE 4-4 Government Transportation Expenditures: 1995, 2000, 2007–2009
Millions of current dollars

	1995	2000	2007	2008	2009
Total, all modes	143,278	186,913	279,989	295,830	242,950
Federal	19,955	21,826	36,948	40,575	42,755
State and local	123,323	165,087	243,041	255,255	200,194
Highway, total	90,099	119,932	175,510	182,057	123,649
Federal	1,708	2,211	2,986	3,853	5,843
State and local	88,391	117,720	172,524	178,204	117,806
Transit, total	25,460	35,417	45,753	50,893	54,341
Federal	1,277	4,390	98	90	92
State and local	24,183	31,027	45,655	50,803	54,249
Rail, total	1,049	778	1,528	1,528	1,880
Federal	1,023	765	1,523	1,527	1,880
State and local	26	13	5	1	0
Air, total	19,204	22,445	43,806	46,593	47,831
Federal	10,807	9,285	23,745	25,329	24,970
State and local	8,397	13,160	20,061	21,264	22,861
Water, total	6,666	7,634	12,075	13,396	13,766
Federal	4,357	4,493	7,314	8,456	8,547
State and local	2,309	3,141	4,761	4,940	5,219
Pipeline, total	26	55	89	92	99
Federal	14	37	66	61	55
State and local	12	18	23	31	44
General support, total	775	653	1,229	1,271	1,384
Federal	769	645	1,216	1,259	1,368
State and local	6	8	13	12	16

NOTES: Federal expenditures include direct Federal spending, excluding grants to State and local governments. State and local expenditures include outlays from all sources of funds, including federal grants, except rail and pipeline modes. Rail and pipeline modes include outlays funded by Federal grants only. The part of expenditures that may be funded by other State and local government funding sources are not covered due to lack of data. Outlays for U.S. Army Corps of Engineers' civilian transportation-related activities, such as construction, operation, and maintenance of channels, harbors, locks and dams, are not included.

SOURCE: U.S. Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics. *Government Transportation Financial Statistics 2012*. Available at http://apps.bts.gov/publications/government_transportation_financial_statistics/2012/ as of January 2013.

a distant second at \$30 billion (mainly from air ticket taxes and fees).

Total transportation revenues increased (without adjusting for inflation) by about 66.2 percent, from \$94 billion in 1995 to \$156 billion in 2009, while government transportation expenditures increased from \$143 billion in 1995 to \$243 billion in 2009. Over the same period, highway revenues rose by 56.5 percent. In 2009, transportation revenues covered only about 64.1 percent of expenditures. When revenues from transportation user

taxes and fees do not cover expenditures, general tax receipts (e.g., from sales and property taxes), trust fund balances, and borrowing are needed to cover shortages. This gap between transportation expenditures and revenues has widened from \$49.6 billion in 1995 to \$87.2 billion in 2009.

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U.S. Department of Commerce (USDOC), Bureau of Economic Analysis (BEA):

TABLE 4-5 Government Transportation Revenues: 1995, 2000, 2007–2009

Millions of current dollars

	1995	2000	2007	2008	2009
Total, all modes	93,698	127,295	162,821	162,385	155,729
Federal	30,478	47,138	54,456	52,053	49,954
State and local	63,220	80,157	108,365	110,332	105,775
Highway, total	66,716	90,275	113,297	110,464	104,379
Federal ^a	22,200	34,986	40,061	37,080	35,144
State and local	44,516	55,289	73,236	73,384	69,235
Transit, total^b	8,575	10,670	13,874	14,591	15,292
Railroad, total^c	36	1	0	0	0
Air, total^d	14,497	22,235	29,384	30,702	29,818
Federal	6,291	10,544	11,994	12,484	12,491
State and local	8,206	11,691	17,390	18,218	17,327
Water, total	3,832	4,058	6,191	6,551	6,142
Federal ^e	1,909	1,551	2,325	2,412	2,221
State and local	1,923	2,507	3,866	4,139	3,921
Pipeline, total^e	35	30	60	63	78

^a Includes both Highway and Transit Accounts of the Highway Trust Fund (HTF) and other receipts from motor fuel and motor vehicle taxes not deposited in the HTF. ^b Includes state and local government only. ^c Includes Federal only. ^d Receipts from aviation user and aviation security fees also included. ^e Includes Harbor Maintenance Trust Fund, St. Lawrence Seaway tolls, Inland Waterway Trust Fund, Panama Canal receipts through 2000, Oil Spill Liability Trust Fund, Offshore Oil Pollution Fund, Deep Water Port Liability Fund, and excise taxes of the Boat Safety Program.

NOTES: Government transportation revenue consists of money collected by governments from transportation user charges and taxes to finance transportation program. The revenue of a transportation mode includes all transportation revenues designated to that mode regardless of the sources or instruments from which the revenues are collected. Tolls from highways, bridges, and tunnels, etc., designated for transit use are counted as transit revenue.

SOURCE: U.S. Department of Transportation, Research and Innovative Technology Administration, Bureau of Transportation Statistics. *Government Transportation Financial Statistics 2012*. Available at http://apps.bts.gov/publications/government_transportation_financial_statistics/2012/ as of January 2013.

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