Prior to the pandemic, the U.S. travel industry experienced 10 straight years of growth due to the strength of the domestic leisure travel, domestic business travel and international inbound travel segments. Travel was a significant economic driver in every region of the country, representing 1 in 10 jobs and generating a travel trade surplus.

**TODAY, TRAVEL REMAINS THE HARDEST-HIT INDUSTRY, WITH AN UNEVEN RECOVERY ACROSS ALL SECTORS**

- In 2021, domestic business travel spending remained 56% below 2019 levels and international travel spending remained 78% below 2019 levels.
- The U.S. travel industry suffered unparalleled losses amid the COVID-19 pandemic.
- While domestic leisure is thriving, the recovery remains uneven across other travel sectors. Domestic business travel and international inbound travel spending remain severely depressed, dragging the overall industry's recovery.
- We need to get back to pre-pandemic levels but also make up for years of losses. The right policies can return us to the trajectory of growth.

**TOTAL DIRECT SPENDING (NATIONAL)**

- **2019:** $640 Billion (88% of 2019)
- **2020:** $518 Billion (36% of 2019)
- **2021:** $518 Billion (48% of 2019)

**DOMESTIC LEISURE TRAVEL SPENDING**

- **2019:** $518 Billion (36% of 2019)
- **2020:** $518 Billion (36% of 2019)
- **2021:** $518 Billion (36% of 2019)

**DOMESTIC BUSINESS TRAVEL SPENDING**

- **2019:** $518 Billion (36% of 2019)
- **2020:** $518 Billion (36% of 2019)
- **2021:** $518 Billion (36% of 2019)

**INTERNATIONAL INBOUND SPENDING**

- **2019:** $57 Billion (13% of 2019)
- **2020:** $57 Billion (13% of 2019)
- **2021:** $57 Billion (13% of 2019)

**THE LOSS IN TRAVEL SPENDING HAD A DRASTIC EFFECT ON AMERICAN JOBS**

- One third of the 9 million direct travel jobs (3 million jobs) were lost at the onset of the pandemic in 2020 and 2.3 million travel jobs remained lost in 2021 (staying at 75% of pre-pandemic levels).
- Jobs that were generated by business travel suffered more than those generated by leisure.
- At only 29% of pre-pandemic levels in 2021, 1.4 million jobs generated by business travel remained lost.
- At only 87% of pre-pandemic levels in 2021, 900,000 jobs generated by leisure travel remained lost.

**ECONOMIC IMPACT**

- **2019:** $1.2T
- **2020:** $680B
- **2021:** $610B

**TOTAL AMERICAN JOBS SUPPORTED**

- **2019:** 16.7 Million
- **2020:** 9 Million
- **2021:** 1.4 Million

**SPENDING**

- **2019:** $1.1T
- **2020:** $261B (22%)
- **2021:** $237B (20%)

**JOB CREATION**

- **2019:** 9 Million
- **2020:** 2.3 Million Jobs Remain Lost
- **2021:** 1.4 Million Jobs Remain Lost

**SOURCES OF TRAVEL**

- **Food Services:**
  - **2019:** $261B (22%)
  - **2020:** $215B (20%)
  - **2021:** $238B

- ** Lodging:**
  - **2019:** $233B (19%)
  - **2020:** $223B (19%)
  - **2021:** $206B

- **Public Transportation:**
  - **2019:** $156B (13%)
  - **2020:** $138B
  - **2021:** $125B

- **Auto Transportation:**
  - **2019:** $111B (10%)
  - **2020:** $79B
  - **2021:** $7B

- **Recreation:**
  - **2019:** $129B (11%)
  - **2020:** $92B
  - **2021:** $34B

- **Travel Planning:**
  - **2019:** $56B (5%)

**BY THE NUMBERS**

- **Direct travel spending in 2021 (vs. 2019):** -22%
- **Direct travel jobs in 2021 (vs. 2019):** -25%
- **International arrivals in the U.S. in 2019—declined to 29 million (36% of 2019) in 2021:** -79%
- **Percentage of U.S. GDP attributed to travel in 2019—it was only 1.5% in 2021:** 2.9%
- **U.S. jobs that depended on travel in 2019—it was one in 20 in 2021:** 10
- **No. 7: Where travel ranked in terms of employment compared to other major private industry sectors in 2019—it ranked number 14 in 2020:**

**TOP 10**

- Travel was among the top 10 industries in 29 states and D.C. in terms of employment in 2019—but only in 25 states in 2021.
Prior to the pandemic, business travel spending accounted for 26% of total travel spending, yet at the end of 2021, it represented just 14% of travel spending.

Direct business travel spending totaled $306 billion in 2019 ($270B domestic + $36B international); 42% of business spending ($128B) was from meetings and events.

Business travel plummeted in the wake of the pandemic and spending remained at just 41% of 2019 levels in 2021.

Combined 2020 and 2021 business travel spending losses -> $391 billion

Combined 2020 and 2021 meetings and events losses -> $186 billion

Business travel jobs remained at just 29% of 2019 levels in 2021—equating to 1.4 million jobs still lost.
• There were 79 million international visitors in 2019, 40 million from overseas (i.e., all countries besides Canada and Mexico).
• In 2019, each overseas traveler spent approximately $3,700 when they visited the U.S. and stayed an average of 17 nights.
• Visitations plummeted by 76% in 2020 and remained at just 28% of 2019 levels in 2021.

INTERNATIONAL ARRIVALS FELL DRAMATICALLY IN 2020 AND REMAINED FAR BEHIND IN 2021

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERSEAS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>19M</td>
<td>22M</td>
<td>72%</td>
</tr>
<tr>
<td>Overseas</td>
<td>7.6M</td>
<td>9.2M</td>
<td>77%</td>
</tr>
<tr>
<td>Canada</td>
<td>2.5M</td>
<td>4.8M</td>
<td>88%</td>
</tr>
<tr>
<td>Mexico</td>
<td>6.8M</td>
<td>10.4M</td>
<td>43%</td>
</tr>
</tbody>
</table>

INTERNATIONAL TRAVEL SPENDING IS AN EXPORT AND HAS A SUBSTANTIAL POSITIVE IMPACT ON OUR TRADE BALANCE

<table>
<thead>
<tr>
<th>Spending by International Visitors to the U.S. ($ Billions)</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>Combined Losses in 2020 and 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Travel Exports*</td>
<td>$239</td>
<td>$84</td>
<td>$80</td>
<td>$315 billion</td>
</tr>
<tr>
<td>Of which: General travel spending + passenger fares</td>
<td>$181</td>
<td>$38</td>
<td>$40</td>
<td>$283 billion</td>
</tr>
</tbody>
</table>

*Total travel exports include education/health/workers spending.

PRIOR TO THE PANDEMIC, TRAVEL PLAYED A KEY ROLE IN LOWERING OUR OVERALL TRADE DEFICIT
• Travel was our largest services exports in 2019—accounting for 9.5% of total U.S. exports—and produced a trade surplus of $53 billion
  • Without travel, our trade deficit of $576 billion would have been $630 billion, or 9.3% higher

SINCE THE START OF THE PANDEMIC, HOWEVER, INBOUND TRAVEL WAS TOO DEPRESSED TO PROVIDE A SIGNIFICANT TRADE DEFICIT RELIEF
• In 2021, travel accounted for just 3.2% of total U.S. exports and produced a trade surplus of only $6 billion
  • Without travel, our deficit would have been just 0.7% higher

TRAVEL PRODUCED A SURPLUS OF $53 BILLION IN 2019 BUT ONLY $6 BILLION IN 2021