



U.S. TRAVEL
ASSOCIATION®

There is no doubt that the coronavirus pandemic has battered and bruised the travel industry, upending over a decade of growth. We all have had to make difficult choices as we navigated the most complex year in our industry's history.



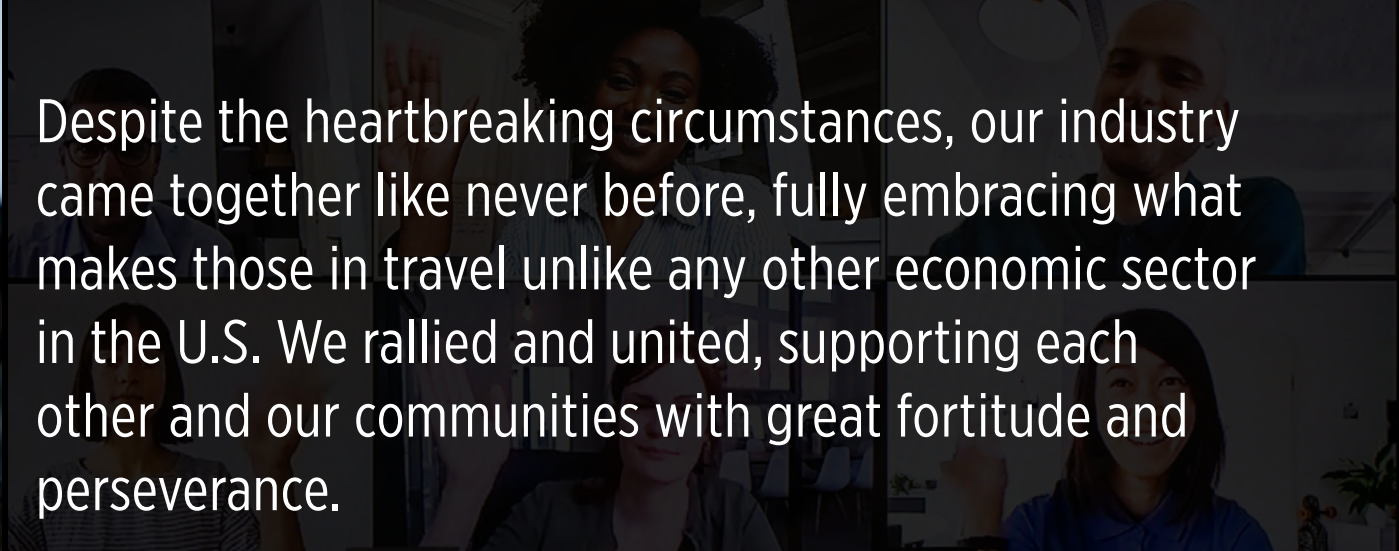
We have faced challenges before, including the devastation from 9/11 and the financial crisis of 2008. We have remained steadfast through natural disasters. We have even seen and overcome other pandemics, though none of this magnitude.

Nothing could have prepared us for the collapse of travel due to the onset of COVID-19 and just how sharply we had to deviate from our positive trajectory to fighting to keep our businesses open.





Despite the heartbreaking circumstances, our industry came together like never before, fully embracing what makes those in travel unlike any other economic sector in the U.S. We rallied and united, supporting each other and our communities with great fortitude and perseverance.



Together, we prioritized necessary changes to how we approach health and safety to instill confidence in travelers facing a world of uncertainty by ensuring a safe and healthy travel experience was not only possible but could be expected. And we reminded Americans just how important travel is to so many aspects of our lives.

Our close coordination has ensured our industry will not only survive but thrive once again.

All of us at U.S. Travel are honored to work alongside you and fiercely advocate for you in Washington. Your hardships are our hardships, your success is our success, and we will always prioritize how we can help you and our industry above all else.

The past year is difficult to revisit, but the following pages aim to capture our collective strength, showing how what we do is so critical, not only to the recovery of our industry, but to the growth of the U.S. economy and to getting Americans back to work.

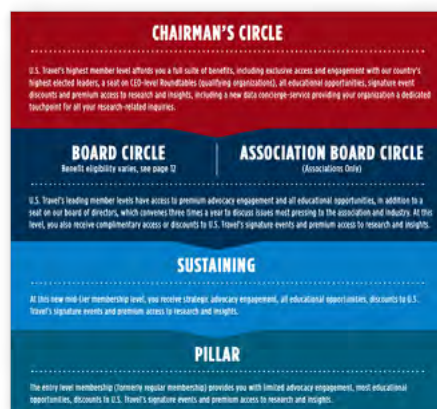
Our work is far from over and our recovery has a long road ahead, but we will continue to stay united and we will safely bring back travel, and rebuild stronger than ever before.

MEETING OUR MEMBERSHIP NEEDS

Taking into consideration membership feedback, realities of how the coronavirus pandemic has affected the industry and financial implications affecting dues, U.S. Travel reconsidered association offerings, creating new resources that will guide the organization in a new chapter for the industry.

Changes included how the association structures membership levels, dues, and associated benefits as well as a new strategic plan guiding our association's priorities in 2021.

While finalizing these changes in 2020, we surveyed and held dozens of calls with U.S. Travel members, as well as prepared for a webinar to be held in early January 2021 to provide further detail on dues structure, benefits and more.



To view updates to member levels and benefits, please [click here](#).



Click here to view [The Power of One | 2021: A Strategic Plan to Rebuild Travel Together](#)



OTHER ASSOCIATION UPDATES

■ National Chair

President and CEO of Destination DC Elliott L. Ferguson, II concluded his final term as U.S. Travel's national chair helping the industry navigate COVID-19, an unexpected situation shifting the entire focus of the association.



Perhaps most notably, Elliott pioneered important discussions about race and racism, challenging the industry to reflect on its own diversity practices and the way forward.

Elliott now passes the gavel to Christine Duffy, president of Carnival Cruise Line.

■ Hall of Leaders

In the fall, Joe D'Alessandro, president and CEO of the San Francisco Travel Association and Visitors Bureau, and Ernest Wooden Jr., former president and CEO of the Los Angeles Tourism and Convention Board, were honored as the 2020 inductees into the U.S. Travel Hall of Leaders for their exemplary leadership and service to the travel industry.

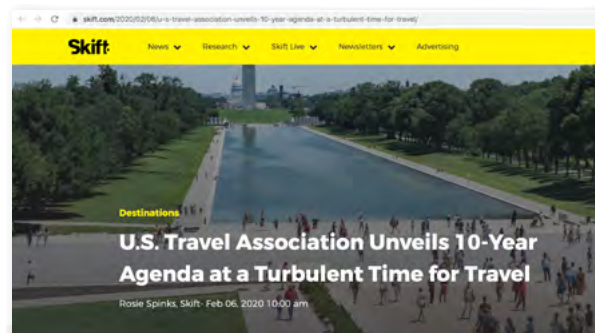
STARTING THE YEAR ON A BRIGHT NOTE

The U.S. travel industry entered 2020 in strong standing, experiencing 107 straight months of growth. Looking at the year ahead, robust domestic travel was slated to offset the sluggish improvement of international inbound travel—and its impact on spending—while U.S. Travel was prepared to continue the fight to reclaim America’s lost share of global long-haul travel.



STATE OF THE TRAVEL INDUSTRY

On February 5, U.S. Travel’s President and CEO Roger Dow delivered the first annual [State of the Travel Industry](#) address to industry leaders, media and policymakers at the National Press Club in Washington, D.C., laying out a vision for the American travel industry and the policy framework that would help achieve it. The speech secured substantial coverage in top publications.



POLITICO

TRAVEL INDUSTRY SEEKS GAINS FROM NEW TRADE DEALS: The U.S. travel industry is hoping for big gains from proposed new trade deals with the United Kingdom and the European Union and possible “phase two” deals with Japan and China, Roger Dow, president and CEO of the U.S. Travel Association, said Wednesday.

“It’s time to treat travel like the trade powerhouse we are,” Dow said in a speech on the state of the industry. Travel is the No. 1 services export and deserves as much attention as other sectors, such as agriculture and manufacturing, he said.

Dow said the Trump administration should “bake” a number of industry priorities



In December, Roger Dow was featured in TheMeetingMagazines.com Corporate & Incentive Travel’s 2021 State of the Industry, discussing the pandemic’s effect on the industry and the future of travel



EMBARKING ON A NEW YORK MEDIA TOUR

Also in February, Roger Dow and U.S. Travel Executive Vice President of Public Affairs and Policy Tori Emerson Barnes traveled to New York City to meet with New York-based members of the media. The trip included meetings with reporters and editors from AFAR Magazine, Skift, Wall Street Journal, Travel + Leisure, Bloomberg News and New York Times.

AFAR

TRAVEL+
LEISURE

Skift

Bloomberg

THE WALL STREET JOURNAL

The New York Times

STARTING THE YEAR ON A BRIGHT NOTE

Continued

INROADS TO INFRASTRUCTURE IMPROVEMENTS

Fixing our nation's crumbling infrastructure—from highways to airports to transit—has always been a [top priority for U.S. Travel](#). There were positive indications that Congress was going to take up the issue when [Democrats](#) and [Republicans](#) in the U.S. House of Representatives released frameworks for long-term infrastructure reform, both of which included many priorities from U.S. Travel's [Investing in Travel Mobility Guiding Principles](#).

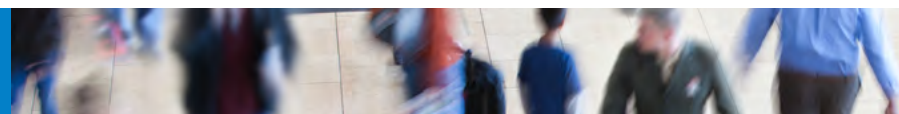
Additionally, with input from U.S. Travel, RAND Corporation [released a congressionally directed study](#) that found raising the Passenger Facility Charge would help airports begin priority projects more quickly.

TRAVEL IS TRADE

Early in 2020, the U.S. Senate passed the [U.S.-Mexico-Canada trade agreement](#), which U.S. Travel supported as studies found the potential for the agreement to generate **15,000 new jobs and \$1.7 billion in new travel-related spending**.

NATIONAL PLAN FOR VACATION DAY

National Plan for Vacation Day (NPVD) on January 28 was an overwhelming success. Social media was a key driver of this year's engagement, while hundreds of local media outlets, as well as a few national publications, across the country reported on NPVD, including Forbes, Travel + Leisure, the Chicago Tribune and Yahoo Finance.



Executive Vice President of Public Affairs and Policy Tori Emerson Barnes appears on [CBS Sunday Morning](#) to discuss the importance of investing in U.S. airports



CORONAVIRUS CHANGES EVERYTHING

In January, reports of a dangerous, highly contagious virus, dubbed COVID-19, began to emerge. Cases started rising around the world. U.S. Travel began extensively monitoring the rapidly evolving situation in early January for its impact on travel, holding regular touchpoints with agencies across the federal government.

- The White House
- The President's Coronavirus Task Force
- Health officials from the Centers for Disease Control and Prevention and others within the Department of Health and Human Services
- Representatives from the Department of Transportation and the Federal Aviation Administration
- Experts from the Department of State
- Leaders within the Department of Homeland Security and Customs and Border Protection



- A top priority was keeping our membership and the broader industry informed on the latest developments, messaging and government resources to help communicate facts to the traveling public and encourage safe and healthy travel practices. Early on, U.S. Travel **created a toolkit** for members and the industry to reference, as well as developed **a weekly communication** with the latest information and resources useful to our industry.



- U.S. Travel also **coordinated member calls with health experts and government officials** to provide status updates and respond to pressing industry questions, and appeared on several industry webinars to share the latest developments.



AN INDUSTRY IN PERIL

Early economic impact estimates indicated just how dire of a situation this would be for the travel industry. U.S. Travel regularly analyzed the potential devastation, holding press conferences and appearing on top networks and print publications to provide our perspective and the importance of travel to the U.S. economy and American jobs.

U.S. Travel worked closely with Tourism Economics to routinely assess and forecast the impact on the travel industry, using the findings as the basis for advocacy efforts.

Several examples include:

To drive home the reason destination marketing organizations (DMOs) should have access to Paycheck Protection Program (PPP) loans, as well as why additional relief was needed for small businesses, [U.S. Travel analysis](#) found that more than half (55%) of all small travel businesses in the U.S. were at risk of either taking longer than six months to recover or never recovering at all.

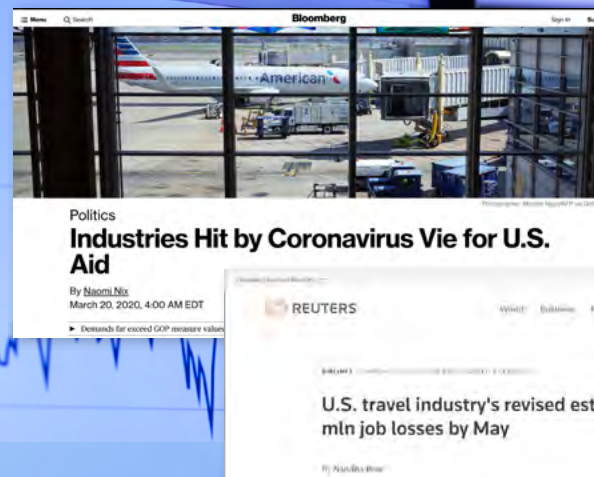


In the fall, U.S. Travel released a report, [Getting Back to Business: Navigating the Safe Return of Meetings and Their Role in Economic Recovery](#), which analyzed the devastating impact of COVID-19 on business travel, meetings and events to help make the case for implementing policies that could safely restart this important sector.



By April, travel unemployment alone was 51%—double that of the worst year of the Great Depression (25% in 1933). [The damage from the coronavirus pandemic](#) on the travel industry was found to be 10 times worse than that of 9/11.

By fall, U.S. Travel's [forecast](#) anticipated a slightly more optimistic domestic travel picture than what the summer forecast projected, though the outlook for business travel and international inbound travel worsened.



In total, the American travel industry experienced:

\$500 billion
in lost spending

\$1.1 trillion
in lost economic activity

6 million
lost travel-supported jobs

FIGHTING FOR FEDERAL RELIEF

As circumstances evolved and with the situation growing more dire, U.S. Travel quickly pivoted resources to save travel businesses. Efforts were driven by the need to support as many travel businesses and workers as possible by quickly securing sustained relief, as well as establishing policy and guidance that would help get America moving again—safely.

Strategic use of advocacy, grassroots, media relations, communications and research resulted in several significant legislative achievements throughout 2020, securing over **\$60 billion in relief** through federal programs for travel businesses and travel workers. However, understanding that more relief—and ultimately stimulus—would be necessary, U.S. Travel continued to fight throughout the year, while laying the groundwork for policy in 2021.

TAKING OUR MESSAGE TO THE WHITE HOUSE

As borders closed and stay-at-home orders were issued, U.S. Travel did not relent in communicating the challenges ahead for the industry. March 17, Roger Dow, joined by other leaders of the travel industry, **met at the White House with President Trump** to discuss the **damaging economic impact** of the pandemic. The group also called on the President to put significant resources towards helping sustain the jobs that were sure to be lost due to the government imposed stay at home orders. The president assured U.S. Travel that the administration recognized the importance of providing the industry support and the CARES Act moved quickly through Congress.



Roger Dow was invited to join the White House task force in April, representing travel businesses of all sizes, to help chart America's economic recovery. The White House pledged to work in tandem with top leaders in hospitality, real estate, banking and financial services on how these industries could make a safe return.

In May, Roger joined **Vice President Pence for a roundtable discussion** in Florida where he and other leaders in the industry provided the latest on the pandemic's mounting devastation to the travel industry.

Nearly
28,000 ADVOCATES

88,000 connections
with CONGRESS

83,500 EMAILS SENT

4,400 TWEETS

- Richard Bates, Senior Vice President of Government Relations, Disney
- Michael Brown, President & CEO, Wyndham Destinations
- Mark Hoplamazian, President & CEO, Hyatt Hotels Corporation
- David Kong, President & CEO, Best Western Hotels & Resorts
- Elie Maalouf, CEO, InterContinental Hotels Group Hotels & Resorts' Americas region
- Chris Nassetta President & CEO, Hilton
- Patrick Pacious, President & CEO, Choice Hotels International, Inc.
- Chip Rogers, President & CEO, American Hotel & Lodging Association
- Arne Sorenson, President & CEO, Marriott International

FIGHTING FOR FEDERAL RELIEF

Continued

ADVOCATING TO CONGRESS

Ensuring the White House understood travel's pivotal role in economic and jobs recovery was just one step in our efforts to support and rebuild our industry. U.S. Travel worked extensively with Congress, aggressively [pursuing legislation](#) that would provide relief for travel businesses of all sizes and destinations across the U.S.

The CARES Act

The first major relief bill passed on March 27. The \$2.3 trillion CARES Act, the largest economic relief package in U.S. history, contained many provisions that U.S. Travel advocated aggressively to include, resulting in:

- **\$377 billion in loans and loan forgiveness for small travel businesses**
- **\$454 billion in federally backed financial assistance**
- **Tax relief to mitigate losses**
- **Grants for impacted tourism businesses and airports**

These grants and loans were administered through a series of programs that included:

- **The Paycheck Protection Program (PPP)**
- **The Main Street Lending Program**
- **Economic Injury Disaster Loans (EIDL)**
- **Municipal Liquidity Facility**
- **Economic Development Administration (EDA) grants**

To help the industry identify how to access relief through these programs, U.S. Travel [hosted an industrywide webinar](#) just three days after the CARES Act was signed to walk our members through the details of each program.



Visit ustravel.org/ReliefResources to access available resources.

Nearly
2,300 from the industry
ATTENDED

FIGHTING FOR FEDERAL RELIEF

Continued

The CARES Act (Continued)

In addition, U.S. Travel **created a dedicated CARES Act webpage** that included a summary of the full CARES Act, an **eligibility guide** that companies could use to determine the programs for which they qualify, a suite of fact sheets that outline the details of every program and a host of additional resources from the federal government and partner organizations. As new information was released for all available programs, **fact sheets and the webpage remained updated** to ensure members always had the latest information on relief options and opportunities. Additionally, U.S. Travel provided a **specific email address for CARES Act questions**.

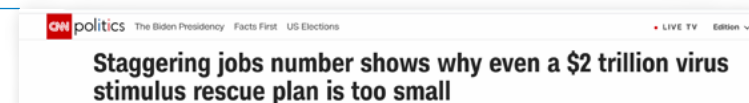
U.S. Travel continued to **host webinars for the broader industry about specifics of legislation**, occasionally including government officials to answer program-specific questions. Our government relations team **participated in 40+ additional webinars and calls** hosted by our members to provide details and answer questions about how travel companies could benefit from these programs.

Additionally, alongside U.S. Travel's public affairs team, the **Destinations Council released a dedicated toolkit** for DMO, as well as held a specific webinar of available relief. The toolkit included COVID-19 travel industry research, CARES Act Relief resources, details on U.S. Travel's COVID-19 policy priorities and additional travel industry resources.

Though the CARES Act was a strong start, **it was clear** there was still a significant need for additional relief, protection and stimulus for travel and tourism companies. U.S. Travel immediately began aggressively advocating for several measures to be included in the next round of relief legislation.



More than **1,400**
DMOs ATTENDED



Between March 31 and December 29, U.S. Travel, its membership and the industry **sent more than 30 letters to Congress and the administration** about the need for additional relief.

FIGHTING FOR FEDERAL RELIEF

Continued

Modifications to the Paycheck Protection Program (CARES Act 3.5)

In April, Congress passed a CARES Act enhancement bill, which included several provisions U.S. Travel—and the industry—fought vigorously for, including the replenishment of funds to the PPP and securing an additional \$60 billion for the EIDL program.

Continuing the Fight for Relief, Protection and Stimulus

U.S. Travel **developed six legislative policies** that would provide additional relief and would help jumpstart travel, quickly communicating with Congress how these measures would benefit the economies and workforce of communities nationwide.

While DMOs were initially eligible for PPP in early iterations of the legislation, they were not included in CARES or a subsequent extension and modification of the PPP and U.S. Travel remained laser focused on including DMOs of all types in legislation throughout the year ultimately becoming successful in the December COVID relief package.

Additionally, **U.S. Travel** led the creation of **a set of federal policy priorities**, in partnership with the **Meetings Mean Business Coalition (MMBC)** with **Go Live Together**, aimed at bringing financial support to businesses and workers in the meetings and events industry.

Virtual Hill Week and Digital Engagements

In June, U.S. Travel organized the first-ever Travel's Virtual Hill Week to share our industry's story and advocate for our most pressing policy priorities with members of Congress and their staff. Nearly 300 meetings were held with members of Congress, coupled with an industrywide social media and action alert campaign that ensured Washington, D.C. heard us loud and clear.

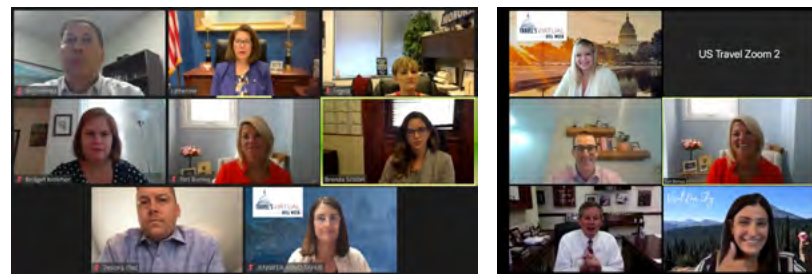
In addition to Travel's Virtual Hill Week, U.S. Travel's advocacy team continued to organize one-off round table meetings with key members of Congress and in-district or in-state travel leaders with virtual townhalls.



The HEALS Act and the HEROES Act



In subsequent bills introduced by Senate Republicans (**Health, Economic Assistance, Liability Protection and Schools (HEALS) Act**) and Democrats (the Health and Economic Recovery Omnibus Emergency Solutions (HEROES) Act) both included many provisions supported by U.S. Travel.



Nearly **300** TRAVEL INDUSTRY
LEADERS from **41** STATES

919 CONTRIBUTORS



14,300 TWEETS

FIGHTING FOR FEDERAL RELIEF

Continued

COVID RELIEF Now Coalition

As negotiations between Congress and the administration carried through fall, **U.S. Travel alongside the American Hotel & Lodging Association and the International Franchise Association led the establishment of the COVID RELIEF NOW Coalition.** To announce the launch, the coalition hosted a press conference calling on Congress to act on a stimulus package to bring relief to the millions dealing with the impact of the pandemic.



More than 300 travel businesses, state and local government and private organizations joined the effort, [sending letters](#) to congressional leadership, calling attention to this issue [in the media](#), placing op-eds, sending action alerts and participating in social media and [ad blitzes](#).

The coalition also **executed extensive grassroots and grasstops efforts** in the states of congressional leadership—California, Kentucky and New York. Tactics included dozens of New York business leaders [sending a letter](#) to Minority Leader Chuck Schumer (D-NY) asking for DMO eligibility in PPP among other relief provisions. Speaker Nancy Pelosi (D-CA), House Minority Leader [Kevin McCarthy](#) (R-CA) and Senate Majority Leader [Mitch McConnell](#) (R-KY) received similar letters.

During a pivotal moment in negotiations, U.S. Travel conducted a **five-day grassroots activation blitz**, encouraging the industry to engage each day using a different tactic, from posting on social media to placing an op-ed and sending an action alert.



16 OP-EDs



1,200+ ADVOCATES
4,000 EMAILS

160
ORGANIZATIONS



275
TWEETS



1 million
REACHED



DMOs across the U.S. sent
14 LETTERS to Congress

2,300 ADVOCATES
6,000 EMAILS
600 TWEETS

were sent to
MEMBERS of CONGRESS



FIGHTING FOR FEDERAL RELIEF

Continued

COVID-19 Emergency Relief Bill

At the close of the year, Congress passed a year-end funding bill that included a COVID-19 recovery package that provided federal support for travel workers and businesses of all sizes. **This development capped a hard-fought campaign to win additional support for America's travel industry.**

U.S. Travel's government relations team immediately reviewed and consolidated program specifics and the application process for the travel industry. A few top highlights include:

- **PPP Eligibility for DMOs:** Expands PPP eligibility to both nonprofit and quasi-governmental DMOs with 300 employees or less (full time and part-time combined).
- **\$35 billion is set aside for first-time PPP loan recipients.**
- **Second round of PPP loans:** Businesses with 300 employees or less and a 25% decline in revenue in any quarter in 2020 may receive a second PPP loan of up to \$2 million.
- **Extension to use Coronavirus Relief Funds until December 31, 2021.**
- **\$15 billion in grants to concert venues, performing art centers, theaters and museums** with 500 or less full-time equivalent employees and at least a 25% decline in revenue, among other qualifications.
- **Extension of the Employee Retention Tax Credit through July 1, 2021.**
- **\$2 billion in grants for airports and airport concessionaires:** Including \$1.75 billion in grants for commercial service airports and \$200 million for airport concessionaire relief.
- **Full deductibility of business meal expenses incurred in 2021 and 2022.**

Prior to the end of the year, U.S. Travel scheduled a webinar to take place immediately in January 2021 where the government relations team would provide details of the bill, resources for how to access and answer questions from members and the industry. The organization also began updating relevant documents to **create a [new toolkit of resources](#).**

Additional U.S. Travel-Advocated Relief Bills Introduced Throughout the Year


- **The Pandemic Risk Insurance Act**
Congresswoman Maloney (D-NY)
- **The Sustaining Tourism Enterprises Pandemic (STEP) Act**
Senators Catherine Cortez Masto (D-NV), Roy Blunt (R-MO), Amy Klobuchar (D-MN) and Kevin Cramer (R-ND)
- **A Bill to Amend the Small Business Act and the CARES Act to Establish a Program for Second Draw Loans and Make Other Modifications to the Paycheck Protection Program**
Congressman Steve Chabot (R-OH)
- **The Hospitality and Commerce Recovery Act of 2020**
U.S. Senators Catherine Cortez Masto (D-NV) and Kevin Cramer (R-ND)
The bill was again reintroduced early in 2021 following U.S. Travel's aggressive advocacy efforts.
- **The Protecting Tourism in the United States Act**
Senators Roy Blunt (R-MO) and Amy Klobuchar (D-MN)

FIGHTING FOR FEDERAL RELIEF

Continued


PROGRESS ON OTHER LEGISLATIVE PRIORITIES

Great American Outdoors Act




In mid-June, the U.S. **Senate passed the Great American Outdoors Act**, a bipartisan bill that U.S. Travel championed, led by Senators Cory Gardner (R-CO), Steve Daines (R-MT) and Joe Manchin (D-WV). The legislation prioritizes the protection and preservation of our natural parks and public lands. Notably, the legislation also secured much-needed funds to help **address the deferred maintenance backlog** facing the National Park Service—a high priority for U.S. Travel. This bill passed at a pivotal time, as U.S. Travel’s [research found](#) that travelers preferred recreating outdoors amid the pandemic. Funding provided by the Great American Outdoors Act **will support an estimated 100,000 jobs, \$6.5 billion in labor income and \$17.5 billion in economic output per year, as well as contribute \$9.6 billion to U.S. GDP.**

REAL ID



Additionally, U.S. Travel aggressively [fought for the extension of REAL ID compliance](#) citing the disruption it would cause at U.S. airports, hindering the return of travel. Due to strong advocacy efforts, the deadline was pushed to October 1, 2021, though U.S. Travel [will continue to work](#) to extend the deadline further until travel is more thoroughly restored.

Visit America Act



The Visit America Act, which would create a position in the U.S. Department of Commerce specific to growing inbound travel to the U.S. and set a goal of welcoming 116 million visitors by 2028, [progressed through the Senate](#) with a [companion bill also introduced](#) in the House—a positive direction for one of our top priorities in 2021.

Funding provided by the
GREAT AMERICAN OUTDOORS ACT
will support

100,000 jobs

\$6.5 billion
in labor income

\$17.5 billion
in economic output
per year

\$9.6 billion
to U.S. GDP

PREPARING FOR 2021 AND A NEW CONGRESS

Ahead of the November elections, U.S. Travel was in close communication with both the Trump and Biden campaigns, ensuring we were establishing and maintaining the strongest connections to position us for any outcome. Our focus was on communicating both how a thriving travel industry is necessary for a strong economy and workforce, how the pandemic has had an outsized impact on our industry and the policies that can help safely restore travel.

Additionally, U.S. Travel strategically used **TravelPAC** funds to maintain and strengthen our bench of champions in Congress, allowing us to also ensure our members of Congress understand the importance of our industry—and the need to advance policies to support its return.

TravelPAC also provided a monthly newsletter, and additional communications, with updates on key developments regarding the election, which included analysis and insights from the National Journal.

A NEW ADMINISTRATION

Following the election of Joe Biden, U.S. Travel immediately began working with the incoming administration's transition team on how the president-elect could assist the travel industry. We **established a set of policy priorities** for the administration's first 100-days, focused on securing and enacting additional relief, safely restoring both domestic and international travel, and bringing back meetings and events.

U.S. Travel also worked to develop a comprehensive **Power of Travel Policy Platform** that would not only guide recovery but provide a blueprint for the next four years, outlining how to build back the industry stronger than before. A summary of the platform was released in late fall, with Roger Dow set to cover the components during the 2021 State of the Travel Industry address in January.



BUILDING BACK BETTER

Travel's Power to Accelerate Economic Recovery and Reunite America
Recommendations for the First 100 Days of the Biden Administration

America's economy cannot recover unless the travel industry recovers.

- In 2019, the travel industry was one of the largest sectors of the economy, supporting 1 in 10 American jobs.
 - In 2019, \$1.1 trillion in travel industry spending supported 15.8 million American jobs.
 - The travel industry was a top-10 employer in all 50 states, including the largest employer in Nevada, third largest in Florida, fourth largest in Arizona and sixth largest in Georgia.
 - International visitor spending in the U.S. was our nation's largest service industry export, generating a trade surplus of \$59 billion.
- COVID-19 has devastated the travel industry more than any other sector of the economy.**
- Due to COVID-19, the U.S. lost nearly \$500 in travel spending.
 - 42% of all jobs lost nationwide are attributable to declines in direct travel employment.

We cannot afford to wait
AMERICA NEEDS A NATIONAL PLAN TO RESTORE TRAVEL

Travel industry employment and spending are projected to take five years to fully recover from this crisis, which would delay broader economic recovery until after President Biden's first term.

But with a focused, national plan to restore travel to and within the United States, the Biden administration can accelerate job growth and economic recovery, while helping to reunite Americans with each other and the world.

We urge President Biden to kickstart the industry's recovery with two significant public efforts within the first 100 days of the administration:

- Immediately developing executive orders to aggressively restart travel
- Safely reopen international travel through risk-based COVID-19 testing protocols, remove international travel bans and set a goal for welcoming 10 million visitors to the U.S. by 2023, which will reestablish the United States as the most welcoming country in the world.

Statistics will be updated as new data becomes available.
© 2020 U.S. Travel Association, D.C. 20005 | TEL: 202-462-6422 | ustravel.org



[Click here to view Building Back Better](#)

[Click here to view Power of Travel Policy Platform](#)

THE IMPACT OF COVID-19 ON U.S. TRAVEL EVENTS

Starting in February U.S. Travel began taking a close look at our upcoming signature events through the lens of gathering restrictions and other guidance from the administration, health experts, and state and local governments.



(Slated for April 1-2, 2020 in Washington, D.C.)

Following guidelines from Washington, D.C.—as well as how Congress was approaching the situation—U.S. Travel evaluated how to hold our industry's premier legislative fly-in.

Recognizing that industrywide advocacy has never been more important, we quickly reevaluated how and when we could connect travel leaders with members of Congress. As Congress kicked off negotiations on the next large relief package in the summer, U.S. Travel strategically held Virtual Hill Week in order to take our unified message to Congress. See page 12 for more details on how Virtual Hill Week supported our advocacy efforts.

Destination Capitol Hill took place virtually, March 17, 2021 with record attendance.



(Slated for May 30-June 3 in Las Vegas, NV)

IPW 2020 in Las Vegas was pacing strongly on booth sales and delegate registrations through the end of February, with revenues also at or above the previous year's pace. Only China and the Asian markets were down year over year due to the COVID-19 situation in that region.

However, as the pandemic ensued, U.S. Travel worked with the Las Vegas Convention and Visitors Authority (LVCVA) and Brand USA on how to approach the historically 6,000-attendee international inbound tradeshow. Due to the uncertainty around the pandemic and international traveling restrictions, [an April announcement](#) confirmed the cancellation of the event.

In the true spirit of industry unity, IPW 2021 host city, Chicago, agreed to step aside for 2021 and will assume the host mantle in 2025.

Collaborating with LVCVA and Brand USA, U.S. Travel immediately set to work on how to prepare for IPW 2021 and what cleanliness precautions would need to be put in place to ensure the health and safety of all attendees. The IPW Advisory group has been exploring every option to evolve the widely attended event to deliver the best value.

In December, U.S. Travel [announced cooperation](#) with Travel Connect, which planned to host its Connect Travel LGBTQ Summit and eTourism Summit at a property adjacent to the Las Vegas Convention Center where IPW will be held.

IPW 2021 will take place in Las Vegas, September 18-22, 2021.

U.S. Travel remained in regular touch with delegates, both through email communication and IPW Daily.



THE IMPACT OF COVID-19 ON U.S. TRAVEL EVENTS

Continued



(Slated for August 22-25 in Grand Rapids, MI)

In June, U.S. Travel shared the difficult yet necessary cancellation of ESTO 2020, due to the guidance of Michigan public health authorities. Working with the teams at Pure Michigan and Experience Grand Rapids, ESTO will be hosted in the city in 2022.

Planning for ESTO 2021 in Los Angeles, CA quickly started with consideration on how to handle the typically 800+ person educational seminar. The ESTO Planning Committee has been working through several scenarios, including holding a hybrid event that would provide added access to content. For details on the ESTO webinars that kept the delegation informed, see page 22.

ESTO 2021 is will take place in Los Angeles, August 14-17, 2021.



(Held virtually April 3, July 28-31, November 16-18)

As with many meetings in 2020, all U.S. Travel board of directors' meetings switched to a virtual setting. We conducted an extensive evaluation of structure and content in order to ensure the meetings were informative and respectful of schedules.

In the summer and fall, U.S. Travel added additional breakout options to provide members a chance to both see and hear from each other on timely topics, including:

- **Furthering the Discussion: Equity, Diversity and Inclusion (summer)**
- **Data-Driven Decisions (summer)**
- **Operating in the New Normal (summer)**
- **The Return of Business Travel (fall)**
- **Election Impacts on Policy Priorities (fall)**



Meetings Mean Business Coalition (MMBC) Meetings

MMBC successfully held two hybrid events during 2020 in Washington, D.C. In the summer, 33 members attended in person and 32 tuned in virtually. During the fall meeting, more than 20 members attended in person, while 50 participated remotely.

These meetings served as a strong example on how to safely host a hybrid event. This successful development came at opportune moments as U.S. Travel, the Let's Meet There Coalition (see page 21 for more detail) and MMBC began to establish how best to restore business travel, meetings and events.

ACCELERATING TRAVEL'S RECOVERY



INDUSTRYWIDE HEALTH AND SAFETY GUIDANCE

In early May, U.S. Travel collaborated with more than 30 travel businesses, organizations and associations representing every sector of the travel industry, alongside health and medical experts, to develop [Travel in the New Normal: Industry Guidance for Promoting the Health and Safety of All Travelers](#). The document was written based on the **collective agreement on a core set of health and safety guidance** that the entire travel industry could adapt to their businesses—and remained updated to align with the latest health and safety developments.

As the country began to reopen, and in consideration of state issued gathering limits and health and safety, MMBC, along with industry partners across the broader travel, health and safety communities, **collaborated on six key principles for the meetings and events industry** that aligned with the broader industrywide health and safety guidance.

MMBC and the Let's Meet There Coalition also began collecting information from businesses and organizations who successfully held in-person or hybrid meetings. Findings would populate [MeetSafe](#), a digital platform where businesses could find best practices for how to hold a safe meeting.

Additionally, U.S. Travel worked closely with the administration on necessary health and safety steps that would help restart travel. The U.S. Department of Transportation released new guidance titled, [“Runway to Recovery: The United States Framework for](#)



[Airlines and Airports to Mitigate the Public Health Risks of Coronavirus,](#) to support the health and safety of air travel passengers and aviation employees. U.S. Travel Association joined [thirteen other](#) groups representing the aviation and travel industries in commending this important step forward toward outlining a framework for airlines, airports and others to mitigate public health risks, and ensures the entire U.S. aviation system is following a safe, responsible path toward recovery.

#TravelConfidently

To reinforce the commitment to health and safety across the industry, **U.S. Travel established the brand-agnostic #TravelConfidently campaign** to communicate the consistent cleanliness measures travelers could anticipate while on their trip. Materials also emphasized that a healthy and safe travel experience is a shared responsibility that requires travelers and residents to also do their part by taking preventative measures, such as wearing masks, practicing physical distancing and washing hands regularly.

U.S. Travel released a toolkit in mid-June that was regularly updated with seasonal graphics and copy for use across the industry.



ACCELERATING TRAVEL'S RECOVERY

Continued

MARKETING AND COMMUNICATIONS INDUSTRY CAMPAIGNS

As U.S. Travel pursued an aggressive legislative agenda to stimulate travel, it became clear that a strategic marketing and communications campaign would be a necessary component in order to safely restart travel more quickly.

U.S. Travel convened a working group of more than 75 marketing and communications representatives from every sector of the travel industry to develop a strategy to jumpstart travel. Working with mcgarrybowen and Publicis Groupe, two agencies with proven track records to spark behavior change and movement, the group identified a phased and layered strategy, backed by data, to get Americans moving again.

Let's Go There and Let's Go There, Soon

The second step was to safely encourage Americans to start thinking about travel.

U.S. Travel took a leadership role in establishing a group of 75 organizations joined together to form the [Let's Go There Coalition](#) to develop an industrywide, national, multichannel, multi-phased marketing campaign, primarily targeting domestic leisure travelers. The [Let's Go There campaign](#), supported by coalition member funding and in-kind media, aimed to give Americans permission to do what is safe, fun and exciting: make plans to travel.



Roger Dow appears on CNN

Let's **GO** There

Breaking into three workstreams—paid, earned, owned/travel trade—the group closely monitored traveler sentiment and developments with state and regional reopenings to determine appropriate launch dates,

fast-tracking asset development and paid media planning.

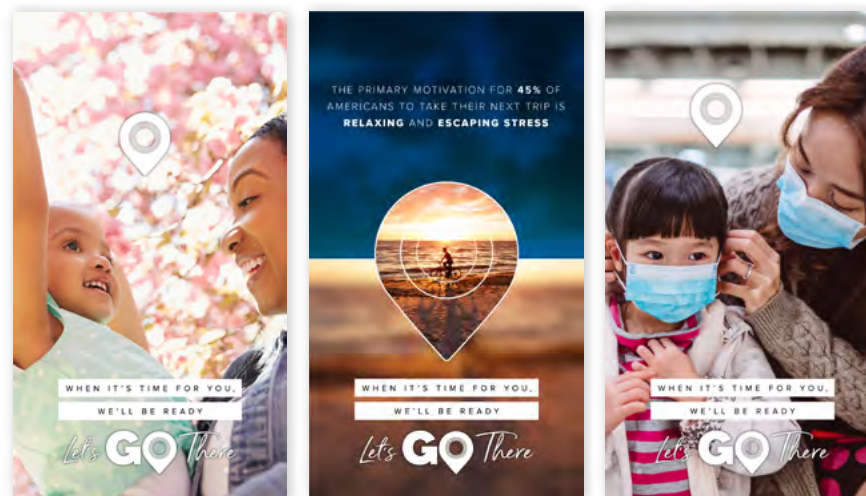
The campaign officially launched just after Labor Day, backed by [survey findings](#) on the correlation between planning and happiness, and aligning with more positive sentiment data and travel trends. The initial rollout was an overwhelming success, with the flagship video airing twice during Sunday Night Football in September.

Due to the varying degree in which states were open or organizations were comfortable with marketing, the coalition determined an iteration, known as Let's Go There, Soon, would be appropriate to further emphasize planning future visit without compromising the industrywide effort to build awareness campaign goals.

Let's Go There, Together

Let's **GO** There, Together

Phase 2 of the campaign launched mid-November and extended through the end of December, centered around holiday and family travel. As the emotional connection to travel stayed strong, the campaign focused on giving the gift of future travel, showcasing deals as appropriate to inspire trips to come.



ACCELERATING TRAVEL'S RECOVERY

RESULTS TO DATE

EARNED MEDIA COVERAGE

831 million impressions across online and print channels

LATimes - Leisure—Not Business—Travel Will Help the Battered Industry
People - New Research Shows That Just the Act of Planning a Trip Can Boost Happiness
Adweek - Tourism Brands Join Forces to Get People Traveling Again
Mediapost - Travel Coalition Collaborates With Facebook on 'Look Book'

PAID MEDIA

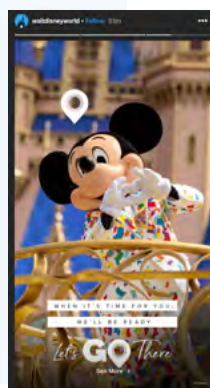
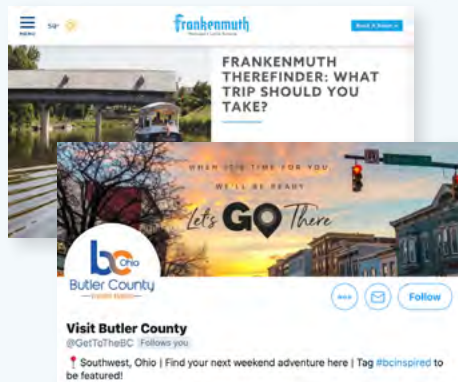
836 million impressions across broadcast and digital platforms, performing 21% above planned

FLAGSHIP VIDEO

416 million views

INDUSTRY ACTIVATION ON OWNED CHANNELS:

More than **7,000 organizations** representing all 50 states and territories and all segments of the travel industry to reach **174 million impressions**



LET'S MEET THERE *Let's Meet There*

Understanding the important need to restore business travel, meetings and events—as well as the challenges presented by gathering restrictions put forth by federal and local governments—U.S. Travel, MMBC and members of the Let's Go There Coalition formed Let's Meet There. The group met regularly to develop a **set of objectives** that would drive efforts forward on the following priorities, targeting media, the C-suite and lawmakers:

- **Ensure COVID restrictions separate Professional Meetings & Events (PMEs) from mass gatherings**
- **Engage the CDC and elected officials in taking a science-driven approach based on health and safety framework, to establish a consistent process for setting state gathering limits.**
- **Implement a comprehensive communications and advocacy strategy to ensure these type of meetings don't fall under the same attendance limits and safety protocols as social gatherings and other high risk activities.**



In September, Tori Barnes was featured in Meetings & Conventions as a top influencer of 2020, guiding the course for recovery post-pandemic and searching for solutions for the greater good.

KEEPING THE INDUSTRY INFORMED

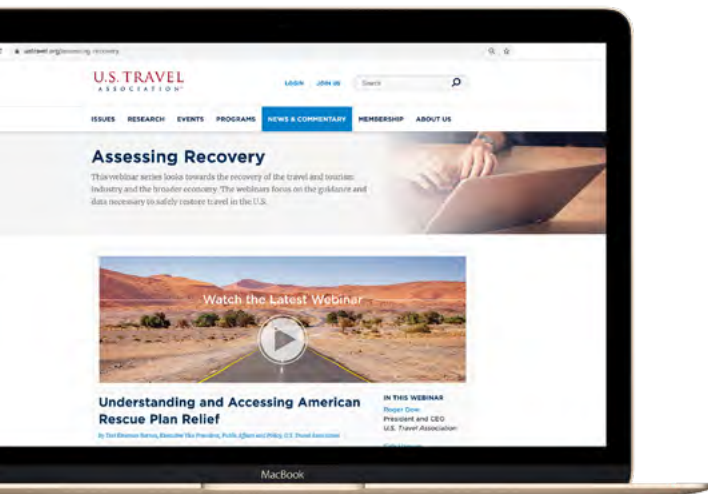


RECURRING WEBINARS

Starting in March just after the CARES Act was passed, U.S. Travel began holding regular webinars focused on relief measures the industry can access—and how to go about doing so. Other topics included race, racism and social equity, led by U.S. Travel National Chair Elliott Ferguson. Nearly 30 webinars were held throughout the year.

TRACKING TRAVELER TRENDS AND SENTIMENT

As the industry began to look ahead toward recovery, it became clear the necessity of tracking consumer sentiment and traveler trends to determine next steps. U.S. Travel worked with partners including Tourism Economics, MMGY Global Intelligence, Arrivalist, ADARA, Destination Analysts, Longwoods International, Rove Marketing, and Engagious, among others, on a weekly newsletter, dashboards and reports to compile and decipher helpful data.



Additionally, U.S. Travel **established the weekly Assessing Recovery webinar series** to look ahead at recovery. Attendees heard from data experts, industry leaders and medical professionals on how to interpret available information and use the findings to move the industry forward. In total, 18 Assessing Recovery webinars were held throughout the year.

ESTO WEBINARS AND ROADMAP

The [ESTO Webinar Series](#) continued to provide insights year-round and connecting destination marketing professionals with the latest data, available tools and industry experts.

Additionally, the ESTO Roadmap Series was created to provide specific future-looking content to attendees, including presentations from:

- Linda Nazareth, economist and futurist
- Simon Sinek, author, inspiration speaker

SOME TOPICS DISCUSSED IN 2020 INCLUDE:

ASSESSING *Recovery*

- The Assurances Consumers Need
- Best Practices for Communicating Health and Safety Guidance at Businesses
- Leveraging the Latest Trends in Outdoor Recreation
- Optimizing the Coronavirus Relief Fund
- The Role of COVID-19 Testing in the Recovery of Travel
- The Technologies Revolutionizing the Future of Travel
- The Recovery of Air Travel
- The Safe Return to Hosting Meetings & Events

KEEPING THE INDUSTRY INFORMED

Continued

THE DOW REPORT

U.S. Travel launched a [new video series](#) featuring President and CEO Roger Dow. In 8-10 minutes segments, Roger interviewed CEOs and other top leaders across the travel industry. Each video explored the diverse perspectives of America's top travel brands that share a common commitment to a safe, phased reopening and to provide strategies and shared lessons learned as the industry advances towards recovery.

The first episode debuted on June 30, 2020, with 14 held throughout the remainder of the year.

- Pat Pacious, President and CEO of Choice Hotels International
- Chrissy Taylor, President and CEO of Enterprise Holdings
- Ed Bastian, CEO of Delta Air Lines
- Bob Priest-Heck, CEO of Freeman Company
- Christine Duffy, President of Carnival Cruise Line
- Sheila Johnson, Founder and CEO of Salamander Hotels & Resorts
- Kim Day, CEO of Denver International Airport
- Josh D'Amato, Chairman of Disney Parks, Experiences and Products
- Marilyn Spiegel, President of Wynn Las Vegas
- Jon Tisch, Chairman and CEO of Loews Hotels & Co
- Larry Baer, CEO of the San Francisco Giants
- Caryn Seidman-Becker, CEO of CLEAR
- Doug Baker, Chairman and CEO of Ecolab
- Jeff Arnold, Chairman and CEO of Sharecare and Chairman of Forbes Travel Guide



WEEKLY NEWSLETTERS AND OTHER COMMUNICATIONS

U.S. Travel releases several regular communications to keep the industry informed:

- Every Tuesday: The latest federal happenings, U.S. Travel policy initiatives and advancements, call-to-action, upcoming webinars, coronavirus domestically both domestically and abroad
- Every Thursday: Weekly economic impact and spending data, real-time traveler trends, and the latest consumer and traveler sentiment findings
- Councils and committees regularly received unique communications that highlighted information most relevant to each sector.

INDUSTRY SPEAKING ENGAGEMENTS

U.S. Travel executive staff presented at nearly 100 industry events about the state of the travel industry and ongoing recovery efforts.

CONNECTING THE INDUSTRY



U.S. Travel Association **Destinations Council**

The Destinations Council Board of Advisors met on a bi-weekly basis to share their experiences, as well as offer resources, ideas and advice to assist in the reopening process in their destinations.

The group also supported a timely research project conducted by Miles Partnership, Civitas and Tourism Economics titled, “Funding Futures: Phase I Special Edition.” The research focused on surveying, summarizing, and interpreting major tourism funding models used in destinations in the U.S. and Canada. A webinar was in August to discuss findings.

The Destinations Council and Emerging Leaders mentorship program, which is focused on providing developing DMO professionals enhanced opportunities to grow leadership skills and advance their careers, met in late summer. The discussions centered on new research initiatives, the continuation of a varied and effective board of advisors, and how DMOs can recover with education and marketing strategies.

U.S. Travel Association **National Council of State Tourism Directors**

Throughout the year, NCSTD hosted virtual meetings and forums to discuss a range of topics, including impacts of COVID-19 on their state, reopening efforts and status, diversity and inclusion in marketing efforts, among other topics.

NCSTD also continued their ongoing and supportive relationship with Coraggio Group with added leadership guidance. The forum has proven successful in changing the way state tourism directors think about leading their teams.

U.S. Travel Association **National Council of Attractions and Experiences***

NCAE met regularly to discuss reopening strategies, share resources and discuss new research findings.

The NCAE board of advisors hosted three open forums for attractions and experiences across the country covering topics including current operating statuses, advice for ticket refunds and pausing marketing campaigns, details on closure timelines, and reopening.

NCAE also sponsored Arival's Virtual Summit where members participated in online learning sessions and networking opportunities.



April 2020 brought a new challenge as COVID-19 was widespread and brought the industry to a standstill. Meeting and event professionals came together like never before to donate PPE, turn event space into testing or care sites, collect food and essential supplies and so much more. Our online GMID event submission form quickly became a place to spotlight the incredible generosity and heart of this industry. We then celebrated with over 10,000 virtually through MPI's 12-hour GMID event broadcast.

U.S. Travel Association's **COMMUNICATIONS** ADVISORY COMMITTEE

The Communications Advisory Committee is comprised of more than 50 senior communications professionals within U.S. Travel's board membership who convened to discuss travel industry matters, hear from leading journalists, share best practices, and identify opportunities to support advocacy priorities and speak with a united voice.

CONNECTING THE INDUSTRY

Continued

THE WORTH MEETING ABOUT VIRTUAL DISCUSSION SERIES

MMBC held a discussions series featuring leaders from outside the industry and key players in the reintroduction of business travel and meetings, including Fortune 50 companies and leading trade. Topics included, how to promote economic relief and defining corporate best practices and considerations for the return of business travel.



BY THE NUMBERS:

6,000+
organizations

30,000+
social media
posts

Spirit of
TRAVEL

NATIONAL TRAVEL AND TOURISM WEEK (NTTW)

In April when the U.S. was under lockdowns and strict restrictions on travel, NTTW (May 3-9) embraced a new theme and fresh branding, rallying the industry behind the

#SpiritOfTravel. Unlike previous years where in-person rallies and events were encouraged, for 2020 the event was taken online with digital resources and ideas to spotlight the resilience and hope of the industry.

New this year, U.S. Travel hosted a Virtual Road Trip on Twitter. The 12-hour journey took users from Washington, D.C. all the way to California with a 15-minute stop in every state.



The challenges of 2020 are not fully in the rearview mirror: we have our work cut out for us in the years ahead. But every day we are getting closer to recovery and growth, as well as to the day when we can once again meet in person.

Our advocacy work will be guided by a new, ambitious and comprehensive [Power of Travel Policy Platform](#) that not only outlines how we will rebuild our industry, but how we will take it to new heights.

Our signature events will be reimagined, offering unparalleled value and opportunity.

Our membership will continue to be strengthened as we bring more diverse voices to the table to provide new ideas and further unite our industry segments.

As we turn the page on 2020, it must be emphasized that our story is far from over. We are at the beginning of a new chapter—a chapter that will be fueled by great focus and determination, and by the strength of the remarkable men and women who contribute so much to this industry.

Together, we will rebuild the U.S. travel industry to be better, stronger and more dynamic than ever before.

