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TRAVEL INDUSTRY LEADERS,

The past several months have presented a tremendous “re-introduction” to the travel industry and I’m grateful for the warm welcome and counsel I’ve received from across the travel community.

U.S. Travel is a strong organization that enjoys great support throughout its membership. Thank you to Roger Dow for building a rock solid foundation and providing me (and the industry) with such a talented and dedicated team of professionals.

The team achieved tremendous results in 2022 and this document is just a sampling. A hearty congratulations to everyone involved for your remarkable rebound from an experience unlike anything we’ve seen before.

In 2023, we will lean into the strategic framework and principles that you helped us to create. Most importantly, we will seek to identify, prioritize and execute against opportunities to increase travel in each of our the four critical travel segments: domestic leisure, business transient, group and international inbound travel.

I’m confident that U.S. Travel’s—and the travel industry’s—best days are ahead and looking forward to your engagement as we strive to build an ever stronger and increasingly beneficial association.

GEOFF FREEMAN
President & CEO
U.S. Travel Association
State of the Industry 2022

Two themes dominated the state of the industry in 2022: Pent-up travel demand and ongoing recession fears coupled with economic concerns.

Pent-up demand continued to soar, and travelers’ desire to make up for lost travel experiences helped to largely recover the domestic leisure sector to pre-pandemic levels. The summer and holiday travel periods showed that inflationary concerns and high travel prices did not dissuade travelers but instead shifted behaviors, such as cutting back on travel distance, trip duration and staying with friends and family instead of paid accommodations.

There was also evidence of pent-up demand for business travel—specifically meetings and events—as the sector began rescheduling postponed events which helped to make gains toward 2019 figures. The industry sees potential for growth in this sector, especially as a ‘new normal’ continues to shape travel patterns (i.e. hybrid work, more flexibility, fewer peak months and the blend of business and leisure travel).

However, the recovery has been uneven. Transient business travel and international travel were sluggish throughout 2022. Business travel and international travel are not expected to return to pre-pandemic levels until 2027 and 2025, respectively.

But there is optimism as we head into 2023. U.S. Travel’s latest forecast indicated that despite the ongoing headwinds—economic concerns, recession fears, a strong U.S. dollar, unstable global economies and long U.S. visitor visa wait times—travel industry growth is expected to remain robust as we head into 2023.
Pillars of Focus:
International Inbound Travel

The restoration of international travel continues to be a critical part of a full U.S. economic recovery.

Despite U.S. borders reopening in November 2021, a number of hurdles continued to delay the sector’s full return, harming America’s economy and global competitiveness.

Inbound travel ended the year at 66% of 2019 levels. Top markets have yet to recover—mainly Asian countries such as China and Japan, while others, such as Canada, Mexico, the United Kingdom and Germany have come back strongly.

Throughout 2022, U.S. Travel worked to lift government restrictions hindering travel to the United States.

REMOVING THE PRE-DEPARTURE TESTING REQUIREMENT

The Biden administration repealed the COVID-19 pre-departure testing requirement for all inbound American air travelers and all vaccinated inbound foreign air travelers beginning June 12, 2022. U.S. Travel fought hard to achieve this outcome, leading advocacy efforts across the travel industry in partnership with the broader aviation and business communities.

In an effort to remove the pre-departure testing requirement, U.S. Travel:

- Shaped policy and built strong industry coalitions
- Engaged at the highest levels of the Biden administration
- Developed compelling data
- Testified before Congress
- Engaged with the international travel community
- Drove consistent media coverage
**TIMELINE OF EFFORTS**

**November 2021**
- U.S. borders reopen

**February 2**
- **Letter** from U.S. Travel, U.S. Chamber of Commerce, Airlines for America and American Hotel and Lodging Association to then-White House COVID-19 Response Coordinator Jeffrey Zients

**February 3**
- Coalition of hundreds of travel industry groups, business organizations and bipartisan group of mayors push to remove the testing requirement

**January 19, 2022**
- Sign-on **letter** with 600+ travel groups, representing all 50 states, D.C., Puerto Rico and Guam sent to the Biden administration

**March 8**
- Meeting with U.S. Deputy Secretary of Commerce Don Graves

**March 9**
- Corporate CEO roundtable meets with National Economic Council Director Brian Deese

**May 5**
- **Letter** from 260+ travel and business organizations to White House COVID-19 Response Coordinator Dr. Ashish Jha

**May 12**
- U.S. Travel releases a commissioned survey of vaccinated international travelers

**May 26**
- Executive Vice President of Public Affairs and Policy Tori Emerson Barnes testifies before congressional committees

**June 4-8**
- IPW brought international delegates from 60+ countries to America and U.S. Travel hosts a press conference attended by several hundred media

**June 7**
- Tori Emerson Barnes testifies before the U.S. Senate Subcommittee on Tourism, Trade, and Export Promotion on “Reviving Conventions & Tourism Through International Travel”

**June 8**
- Bipartisan group of 38 mayors send letter to the Biden administration

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**PILLARS OF FOCUS:**

**International Inbound Travel**

**March 8**
- Meeting with U.S. Deputy Secretary of Commerce Don Graves

**May 26**
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**REMOVING THE PRE-DEPARTURE TESTING REQUIREMENT**

**February 3**
- Coalition of hundreds of travel industry groups, business organizations and bipartisan group of mayors push to remove the testing requirement

**March 9**
- Corporate CEO roundtable meets with National Economic Council Director Brian Deese

**May 12**
- U.S. Travel releases a commissioned survey of vaccinated international travelers

**May 31**
- U.S. Travel and Airlines for America senior leaders meet at the White House

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**COVID-19 TESTING REQUIREMENT LIFTED**

**June 12**
- U.S. Travel and Airlines for America senior leaders meet at the White House

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**U.S. TRAVEL ASSOCIATION YEAR IN REVIEW 2022 | 6**
**LOWERING VISA WAIT TIMES**

In 2019, 43% of international visitors (35 million) and half of the international spending ($120 billion) came from countries where a visa is required to enter the United States. However, visa wait times for visitor visa (B-1/B-2) interviews for first-time applicants from top source markets now exceed 400 days.

Long wait times are a de facto travel ban and deter international visitors, harming American businesses and workers. In fact, low prioritization of visitor visa (B-1/B-2) processing could keep an estimated 6.6 million potential travelers from visiting the United States in 2023—resulting in an economic loss of $11.6 billion.

In June, the Biden administration released a National Travel and Tourism Strategy to focus U.S. government efforts on facilitating travel to and within the United States, reducing barriers and making it more efficient for visitors to enter the country. It also set a national goal of welcoming 90 million international visitors by 2027—challenging under current restrictions and entry obstacles.

In a recent international survey by Morning Consult...

International travelers who would **LIKELY CHOOSE ANOTHER DESTINATION OVER THE UNITED STATES** due to lengthy wait times:

- **61%** OF BRAZILIANS
- **66%** OF INDIANS
- **71%** OF MEXICANS

**ACCOUNTED FOR OF INTERNATIONAL TRAVELERS THAT REQUIRE A VISITOR VISA**

(PRE-PANDEMIC)

**TOP THREE SOURCE MARKETS:**

BRAZIL  
MEXICO  
INDIA

Long Wait Times For Tourist Visas Could Be Hurting U.S. Economy

The U.S. Travel Association: ‘Visa processing delays are hurting economic growth. Here’s how the Obama Administration solved the same problem 10 years ago’

SOURCE: Morning Consult
LOWERING VISITOR VISA WAIT TIMES

U.S. TRAVEL'S RECOMMENDATIONS

Throughout the year, U.S. Travel advocated for recommendations to lower VISITOR VISA WAIT TIMES, including:

✔ Set clear timelines and goals to restore efficient visa processing
✔ Increase staffing and resources in high-volume countries and for large international events hosted in the U.S.
✔ Authorize the U.S. State Department to test and broadly implement videoconferencing technology
✔ Provide authorization for the State Department to broadly waive interviews for low-risk B-1/B-2 visa renewals
✔ Support legislation that requires the State Department to temporarily reassign staff to posts with the highest visitor visa wait times

TIMELINE OF EFFORTS

MARCH 15

President Biden signs the Omnibus Appropriations Bill, a $1.5 trillion bipartisan bill that includes provisions on visa processing and consular staffing

SEPTEMBER 21

U.S. Travel’s CEO Roundtable met in person with Sens. Klobuchar (D-MN), Moran (R-KS), Sinema (D-AZ) and Thune (R-SD), State Department officials and election and economic experts.

OCTOBER 6

U.S. Travel’s Morning Consult survey shows long visa wait times are deterring nearly 12 million from visiting the United States

OCTOBER 7

60 bipartisan members of Congress send a letter to Secretary of State Antony Blinken, echoing the industry’s urgent calls for action

OCTOBER 7

U.S. Travel applauds the bipartisan legislation, Visitor Visa Wait Times Reduction Act, introduced by Reps. Salazar (R-FL) and Lee (D-NV)

OCTOBER 7

One year anniversary of the U.S. borders reopening

NOVEMBER 8

Media coverage shows the Biden administration’s lack of progress in addressing visa issues

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NOVEMBER 17

A new infographic spotlights what travelers could do in the time it will take them to get a visa to visit the U.S.

NOVEMBER 21

Fortune published a piece authored by U.S. Travel’s President and CEO Geoff Freeman underscoring the economic problem created by long visa wait times.

NOVEMBER 29

The biannual travel forecast shows a significant decline in international inbound travel for the rest of 2022 and 2023—exacerbated by excessive visa wait times

DECEMBER 1

The “They Wait, We Lose” campaign launches, exposing the consequences of excessive visitor visa wait times

DECEMBER 23

The FY23 Omnibus Appropriations Package passes, with provisions to address visa processing backlogs

LOWERING VISITOR VISA WAIT TIMES

PILLARS OF FOCUS:

INTERNATIONAL INBOUND TRAVEL
LOWER VISITOR VISA WAIT TIMES

LAUNCH OF NEW CAMPAIGN

The comprehensive “They Wait, We Lose” effort features voices of those most affected on a new website, USVisaDelays.com, in English, Spanish and Portuguese. In the first four weeks, the fully integrated campaign resulted in more than 50 testimonials and media coverage in dozens of top-tier outlets.

There are no better voices to tell the personal toll of America’s de facto border closure than the people, families and American businesses directly impacted by egregious visa wait times. The Biden administration must focus on what is in its control and take immediate action to lower wait times—we simply cannot afford to give travelers any reason to avoid visiting the United States.”

— GEOFF FREEMAN, U.S. TRAVEL PRESIDENT & CEO

Trouble getting a visa? New website highlights travelers affected by ‘unconscionable’ wait times

TESTIMONIALS

The shutdown was a major blow for us and for Broadway. These on-going, extensive visa delays are HURTING THE RECOVERY and the business dramatically.

—BROADWAY INBOUND, NEW YORK, NY, U.S.

With 999 days waiting for an interview at the Mumbai U.S. consulate, I’M GOING TO MISS MY BEST FRIEND’S WEDDING in February 2023. I’ll also fail to fulfill my best man duties. Heartbreaking.

—BENJAMIN THOMAS, INDIA

The Market and our many small businesses have been NEGATIVELY IMPACTED by the loss of international visitors. Guests from these countries tended to visit during the spring and fall shoulder seasons, helping sustain our businesses during non-peak travel periods.

—MARITZA CERRATO, LOS ANGELES, CA, U.S.

I want to take a cruise to Alaska with my family but I will not be able to because THE EARLIEST APPOINTMENT I WAS ABLE TO FIND IS 8 MONTHS AWAY, by then, my visa would be expired by one month.

— TRAVELER, MEXICO
2022 marked a dynamic return of U.S. Travel’s annual IPW—nearly doubling delegate attendance from 2021—with more than 4,700 delegates and representation from more than 60 countries. Attendees participated in more than 77,000 scheduled business appointments that will draw future travel business to the United States. The delegation also included nearly 500 members of the international and domestic media.

Each year, IPW spotlights the importance of international visitation and plays an incredibly important role in generating future travel for businesses across the country—and past IPWs have generated more than $5.5 billion in international inbound travel. The trade show’s oversized role was made clear this year when just days following IPW’s conclusion, the Biden administration lifted the pre-departure COVID-19 testing requirement for international inbound travelers.

Returning to IPW 2022 was a reimagined show format, maximizing networking time and offering more flexibility. Also back by popular demand, was IPW Focus, with a greater presence on the show floor, offering delegates access to free, world-class education—all just steps away from IPW’s business appointments. Attendees heard from experts on an array of topics from technology and innovation to research and insights, presented by thought leaders and innovators from around the industry and beyond.
ADVOCATING FOR AN ELEVATED FOCUS ON TRAVEL

U.S. Travel advocated for the Omnibus Travel and Tourism Act of 2021 (S. 3375), which includes the Visit America Act (S. 1947/H.R. 6965) and created an Assistant Secretary of Commerce for Travel and Tourism (and several other pro-travel provisions). The travel industry has advocated for an elevated focus within the federal government for decades—at least as far back as the 1995 White House Conference on Travel and Tourism.

Omnibus creates new travel and tourism post at Commerce

At long last, the U.S. will fund a high-ranking tourism chief

The Assistant Secretary will play an important role as we partner with government to lower visitor visa wait times, modernize security screening and leverage new technologies to make travel more seamless and secure.

— GEOFF FREEMAN, PRESIDENT & CEO, U.S. TRAVEL ASSOCIATION

TIMELINE OF EFFORTS

MARCH 29
The Visit America Act (H.R. 6965) passed the House. The bill contained pro-travel measures, including the creation of an Assistant Secretary of Commerce for Travel and Tourism

SEPTEMBER 29
Visit America Act passes the House with overwhelming support

OCTOBER 6
The Senate Commerce, Science, and Transportation Committee approves the Omnibus Travel and Tourism Act

DECEMBER 6
U.S. Travel sends an industry sign-on letter to congressional leadership urging them to include the omnibus in an end-of-year package

DECEMBER 23
The Omnibus Travel and Tourism Act is included in the year-end government bill

OMBIBUS PROVISIONS

Establishes an Assistant Secretary of Commerce for Travel and Tourism

Directs the State Department to report to Congress on the steps taken to address visa processing backlogs

Continues to allow DHS to exempt returning H-2B workers from the annual H-2B visa cap

Allows the FAA to increase the number of new air traffic controllers and funding for the aviation workforce

VIEW ALL OF THE PROVISIONS
Pillars of Focus: Meetings, Events and Business Travel

As one of our industry’s hardest hit sectors, 2022 marked a strong return of in-person meetings, events and business travel.

Businesses increasingly experienced the negative impacts of reduced business travel and were more likely to invest in it and get their employees back on the road. Yet, economic uncertainty and higher operating costs resulted in subdued growth. While visitations are projected to recover in 2024, business travel spending—once adjusted for inflation—is not projected to recover until 2027.

- As a result of many employees returning to the office and healthy corporate profits, transient business recovered to 78% of 2019 levels in 2022 while group business remained 67% recovered.
- Group travel, while slower to recover, has made progress as a result of reduced restrictions and pent-up demand for face-to-face interactions. The resumption of large conferences and conventions, as well as rescheduled postponed events in early 2023 will propel group business travel growth in the next year.

U.S. Travel worked with industry partners to elevate the importance of business travel to key audiences and lobbied for policies that were aimed at accelerating the recovery of in-person meetings and events.
The Honorable Shalanda D. Young  
The Honorable Kiran Ahuja  
Director  
Director  
Office of Management and Budget  
Office of Personnel Management  
Washington, DC 20503  
Washington, DC 20415  
The Honorable Robin Carnahan  
Administrator  
General Services Administration  
Washington, DC 20405

Dear Director Young, Director Ahuja, and Administrator Carnahan:

As the threat of COVID-19 stabilizes and recedes, we believe the Federal government’s pandemic-era telework, remote work, and travel policies may no longer be appropriate. With American life starting to return to normal, an increasing number of Americans expect their government to do the same and provide the same level of engagement, access, and service that was available before the pandemic. Therefore, to serve the public’s best interests, we respectfully ask that you promptly reassess Federal guidance for agency telework, remote work, and travel policies to encourage a safe return to pre-pandemic operations where possible.

In keeping with the spirit of Executive Order 13991 to use the best available data and science to guide agency decisions, it’s important to note COVID-related hospitalizations remain at a 2-year low, with a mortality rate on the decline due to the widespread availability of COVID vaccines.

We understand the challenges associated with a return to in-person work and travel, but the longer the government takes to start the transition back to conventional operations, the longer the public, Federal workers, and the economy at-large will suffer from outdated practices that fail to keep up with new information and the current needs of the country.

Experience shows virtual environments are no substitute for in-person work. In-person work not only creates critical space for more dynamic collaborations, public engagement, and professional development, but also strengthens minority voices in most group settings— all of which are needed to provide for high-quality public service.

In July, U.S. Travel also sent a letter to the Biden administration urging them to develop a plan to lift pandemic-era remote work and travel policies for federal workers as the pandemic receded. Specifically, the letter called on the Office of Management and Budget, Office of Personnel Management and General Services Administration to provide Federal agencies with a roadmap to transition back to conventional operations as the threat of COVID-19 diminished, emphasizing the harm remote work and restrictive travel policies have on the public, federal workers and the economy at-large.

Meetings Mean Business Coalition meeting with U.S. Deputy Secretary of Commerce Don Graves

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SHARING THE LATEST BUSINESS TRAVEL RESEARCH

U.S. Travel’s Business Travel Tracker is a quarterly survey of both business travelers and corporate executives to monitor business travel activity, expectations and economic factors. This new survey and corresponding business travel index launched in March 2022 and is developed in collaboration with Tourism Economics and JD Power. The tracker includes three components:

- Survey of business travelers based on a mobile survey in key airports
- Survey of corporate executive decision makers
- Quarterly Business Travel Index (BTI), developed by Tourism Economics

QUARTERLY FINDINGS

- **Q1**: One-third of BUSINESS TRAVELERS ARE UNSURE OR EXPECT TO TRAVEL LESS to attend conferences, conventions and trade shows in the next six months than before COVID-19. Quarterly findings are regularly amplified by mainstream media.

- **Q2**: Half of companies still have POLICIES IN PLACE RESTRICTING BUSINESS TRAVEL.

- **Q3**: Businesses have shown a WILLINGNESS TO GET EMPLOYEES BACK ON THE ROAD, with 78% of business travelers expecting to take at least one trip to attend conferences, conventions or trade shows.

- **Q4**: Even though BUSINESS TRAVEL SPENDING IS STEADILY INCREASING, BUDGETS REMAIN LOWER THAN 2019 LEVELS for all types of business travel.

Quarterly findings are regularly amplified by mainstream media.

Business travel is coming back slowly, and these policies will be essential to keeping employees on the road and helping still-recovering companies weather an oncoming recession.

— GEOFF FREEMAN, U.S. TRAVEL PRESIDENT & CEO

5 Charts That Bullish Airline CEOs Need to See on Corporate Travel’s Recovery

U.S. Travel Association Releases Latest Business Travel Tracker

How Long Until Business Travel Returns to Normal?

Q3 Business Travel Tracker finds companies rolling back a pandemic travel restrictions as economy navigates recession fears
Whether through a shared message, an in-person event, a council meeting, an industrywide activation or a virtual touchpoint, U.S. Travel consistently facilitated opportunities for industry colleagues across all travel segments to work together.

While there is much work to be done in the year ahead, 2022 was a year of remarkable progress and growth—visible through the magnitude of our activations, tangible legislative victories or meetings and events that spurred new relationships, inspiration and innovation.

Although each had a different theme and purpose—there was one common thread through them all: Peer-to-peer discussion and guided conversation. By leaning on our industry colleagues, we can work in tandem to shape our shared vision for a brighter future.

This year’s work is proof: THERE IS STRENGTH IN OUR COLLECTIVE VOICE.

Viewpoint: The state’s economy cannot fully recover without the return of meetings
On April 7, the industry celebrated Global Meetings Industry Day (GMID)—an international day of advocacy showcasing the undeniable value business meetings, trade shows, incentive travel, exhibitions, conferences and conventions bring to people, businesses and communities. Under the theme, “Meet Safe,” the 2022 activation spoke to the benefits of in-person, face-to-face meetings.

In October, we announced “Meetings Matter” as the 2023 theme for Global Meetings Industry Day (GMID), to be held on MARCH 30.
From May 1-7, hundreds of travel organizations and businesses across the U.S. came together to celebrate National Travel and Tourism Week (NTTW). The industrywide activation garnered:

- **75** million impressions on Twitter alone from businesses across travel sectors
- **31** elected officials
- **160+** media mentions across mainstream outlets
- Dozens of destinations across the country lighting up red to showcase the power of travel

**We Trended!**

The travel industry boosts the national economy in every part of the U.S. While it is still not back to pre-pandemic levels, we have made, and continue to make, tremendous progress. The #FutureOfTravel looks good! #NTTW22

Missouri’s travel & tourism industry supports hundreds of thousands of jobs and contributes billions to our economy. I'll keep advocating for policies that will help bring more visitors to attractions, restaurants, & hotels in MO & nationwide. The #FutureOfTravel is now. #NTTW22

Proclamation ceremony marks tourism contributions, kicks off National Travel and Tourism Week
More than 1,000 travel leaders gathered in Grand Rapids, Michigan from August 6-9, for U.S. Travel’s ESTO 2022. The event also honored over 30 destination and state award-winners for their exceptional creativity and effectiveness in travel promotion.

The content-rich schedule enabled destination marketing professionals to hear from a wide variety of experts on timely topics. This included peer open forums, closed-door sessions that cultivate peer-to-peer conversations and best practice sharing. Keynote sessions and over 30 concurrent sessions featured world-class speakers that ignited inspiration and unlocked new levels of creativity.

The more than 30 breakout sessions addressed topics such as travel marketing and technology, communications and public relations, data and insights and diversity, equity and inclusion in the travel industry.

New this year: a CEO-only track, focused on leadership and creating tourism plans that withstand change and the Destination Immersion Series—an out of the classroom experience in the heart of the host city.

Following this year’s event, more than three-quarters of attendees indicated that ESTO 2022 was successful and almost 90% of attendees are likely to recommend this conference to a colleague.
Throughout the year, travel leaders convened to discuss shared challenges and priorities.

The Meetings Mean Business Coalition (MMBC) grew to over 70 members in 2022, adding 30 new critical voices within Chairman’s Circle organizations. Led by co-chairs Mike Massari, chief sales officer at Caesars Entertainment and Martha Sheridan, president and CEO of Meet Boston, the group met virtually and in-person to align on the strategic direction of the Coalition.

U.S. Travel’s Destinations Council advisory board, which represents more than 400 destination marketing organization (DMO) and convention and visitor bureau (CVB) members, held several meetings to discuss challenges confronting the industry.

U.S. Travel’s Corporate CEO Roundtable’s September touchpoint was attended by Senators Amy Klobuchar (D-MN), Jerry Moran (R-KS), Kyrsten Sinema (I-AZ) and John Thune (R-SD). Attendees also heard from State Department officials, Jake Sherman, the founder of Punchbowl News and Austan Goolsbee, the former chairman of the Council of Economic Advisors.

Launched in early 2022, U.S. Travel’s Research Advisory Committee grew its membership to 60. In October, nearly 30 members met in Washington, D.C. to engage with research experts on the latest economic conditions. The committee named two co-chairs, Donna Keren, Vice President of Research and Insights at NYC & Company and Ladan Ghahramani, Research Manager at Travel Oregon.

The National Council of Attractions and Experiences (NCAE) advisory board met monthly to share advice and resources on operating through recovery. The council held a successful networking event in Orlando and held its fall meeting in Scottsdale, Arizona where leadership discussed a new regional outreach strategy to engage the attractions community.

The National Council of State Tourism Directors (NCSTD) continued their executive leadership sessions and hosted their annual meeting at ESTO 2022 where the Council recognized Wit Tuttell, director of Visit North Carolina, as State Tourism Director of the Year.

U.S. Travel Communications Advisory Committee, comprised of 91 members, convened both in-person and virtually to discuss messaging and communications strategies for key priorities and heard from premium media and communications leaders. Committee chair, Kelly Schulz, senior vice president, communications and public relations, New Orleans & Company, played an integral role in liaising with U.S. Travel to drive conversations forward.
STRENGTHENING OUR NATIONAL GRASSROOTS PLATFORM

Only a few months after launching, our Travel Action Network has already mobilized our grassroots network to send nearly 600 messages to members of Congress urging for action on the industry’s most critical near-term priorities. With advocates in nearly every state, the Travel Action Network has grown its reach with nearly 30,000 contacts across industry sectors and travel businesses both large and small.

30,000 CONTACTS ACROSS INDUSTRY SECTORS AND TRAVEL BUSINESSES BOTH LARGE AND SMALL

U.S. Travel launched its all-new Travel Action Network—a platform for travel advocates to come together and advocate on key issues impacting the future of the industry. By leveraging the industry’s collective voice and national footprint, our grassroots network effectively propelled tangible change in Washington last year—and enabled travel companies and corporations of all sizes to achieve incredible strides toward recovery, growth and long-term success.

CONVENING THE INDUSTRY
AMPLIFYING AND EDUCATING
BUFFALO, NY
LAS VEGAS, NV

DESTINATION CAPITAL HILL

More than 230 industry colleagues came together on April 5th and 6th, in our nation’s capital to meet with over half of Congress and discuss legislative priorities that will elevate the travel industry. By coming together in-person to lobby Congress, members played a crucial role in advancing U.S. Travel’s advocacy efforts.

LEGISLATIVE POWER HOUR SERIES

Our members were given the opportunity to meet with their members of Congress for in-district roundtables through our Legislative Power Hour Series (formerly Travel Talks). Re-launched in September, the program enabled the Meetings Mean Business Coalition to meet with Rep. Dina Titus (D-NV) in Las Vegas in October and Visit Buffalo Niagara and Destination Niagara USA to meet with Rep. Brian Higgins (D-NY) in August.

FLY-IN SZN: U.S. Travel Association has meetings scheduled throughout the week
U.S. Travel hosted over a dozen webinars to help inform, educate and create dialogue on critical issues facing the industry.

**MACRO ISSUES ACROSS THE INDUSTRY:** This series of webinars touched on some of the most pressing issues of 2022, including:
- Russia-Ukraine war and its impact on travel
- Future of travel mobility
- Importance of diversity, equity and inclusion within the travel workforce
- The travel experience

**DATA AND INSIGHTS:** These webinars—often co-presented with Tourism Economics and other partners—are dedicated to providing exclusive, expert data analysis and impactful insights into the latest industry trends and forward-looking forecasts. Deep dives into the findings of our powerful research dashboards ensure the industry is equipped to make data-driven decisions year round.

**LEGISLATIVE SPEAKER SERIES:** U.S. Travel members had the chance to hear from different members of Congress throughout the year through the virtual Legislative Speaker Webinar Series:
- Senator Bill Hagerty (R-TN)
- Rep. Byron Donalds (R-FL)
- Rep. Zoe Lofgren (D-CA)
- Rep. Sharice L. Davids (D-KS)
- Rep. Darin LaHood (R-IL)

**POLITICS & POLICY:** Following the 2022 midterm election, U.S. Travel welcomed subject matter experts to help breakdown election results, discuss their implications for travel policy and how Congress will likely function.

In July, U.S. Travel held its annual, week-long Daily Getaways program, an initiative to stimulate travel across America. This year’s sale, featured exclusive deals from 10 major travel brands offering discounts up to 50% off loyalty points, theme park tickets, vacation packages and hotel stays.

**FUNDRAISING TO SUPPORT ADVOCACY AND INDUSTRYWIDE INITIATIVES**

**THE 2022 FUNDRAISING EFFORT EARNED $1.4 MILLION IN REVENUE TO SUPPORT OUR ADVOCACY WORK.**
Addressing Industry Issues

Throughout the year, U.S. Travel convened travel leaders to discuss strategies for some of our most pressing priorities and future opportunities that will impact the totality of the industry.

ADVANCING THE INDUSTRY’S SUSTAINABILITY IMPERATIVE

Today, every travel sector is making tremendous strides to lower carbon emissions, reduce waste and protect the environment. In 2022, U.S. Travel moved the needle on this critical issue on many different fronts, including our work with administration officials, members of Congress and industry leaders.

TIMELINE OF EFFORTS

U.S. Travel sends a letter to congressional tax writers, advising on a range of environmental tax and trade policies

Inflation Reduction Act, which contains many of the policy priorities included in the Sustainable Travel Coalition’s priorities—including a $370 billion investment in climate and energy programs is signed into law

President Biden attends the Detroit Auto Show and observes the private sector investments that are making road travel more environmentally friendly

The Department of Transportation gives its final approval for construction to begin on a nationwide network of electric vehicle (EV) charging stations

The Department of Energy (DOE) releases a plan to increase the production of sustainable aviation fuels (SAF)

FY23 Appropriations Omnibus (H. R. 2617) passes and includes a provision directing the FAA to prioritize research on sustainable aviation fuels

STRATEGIZING ON SUSTAINABILITY

U.S. Travel’s Sustainable Travel Coalition convened several times in 2022—aligning the travel, transportation and technology sectors around a cohesive narrative and collecting the industry’s current sustainability actions and initiatives via an industrywide survey. Over 60 members serve as a forum to inform, strategize and develop policies and solutions to address issues for a more sustainable future.
On September 20, U.S. Travel hosted its second annual Future of Travel Mobility conference at Union Station in Washington D.C. This gathering brought together global travel and business leaders, along with government officials and policymakers, to accelerate action on issues critical to the coming decade of travel mobility impacting sustainability, frictionless and secure travel, emerging trends and innovative technology.

Here are the key takeaways, as outlined by U.S. Travel’s Executive Vice President of Public Affairs and Policy, Tori Emerson Barnes:

- **As members of our industry work to win back business and international travel, they’re not just competing with each other; they’re competing with technology.** That means travel needs to be as friction-free as possible. As MGM Resorts International’s Chief Executive Officer and President Bill Hornbuckle said, we also need to make a compelling case for meetings and events and demonstrate the value they create.

- **If you build it, they will come.** Customer preferences are shifting quickly. Travelers are looking to the industry for sustainability and mobility solutions, and it’s our job to meet—and exceed—their expectations.

- **We’re on the cusp of some truly exciting transformations in travel mobility.** From rail travel and autonomous vehicles to supersonic jets, emerging technologies promise greater connectivity and comfort thanks to the vision and hard work of today’s visionary entrepreneurs and innovators.
FOCUSING EFFORTS ON THE TRAVEL WORKFORCE

This year, the workforce crisis and labor shortages continued to be a persistent challenge for the industry—impacting travel businesses both small and large. Over the last 12 months, U.S. Travel tracked the current state of the industry’s workforce while simultaneously providing resources and data to help members understand various workforce challenges and trends.

In June, U.S. Travel held meetings with Secretary of Commerce Gina Raimondo and Assistant Secretary of Commerce Grant Harris to discuss which actions the administration should prioritize from the national strategy, including critical measures that will help the industry rebuild the workforce and shortages impacting the seasonal worker market.

DIVERSITY, EQUITY AND INCLUSION

Diversity, equity and inclusion (DEI) strengthens organizations by bringing new ideas and perspectives to the forefront. U.S. Travel worked with industry leaders to spotlight mobilizations that highlight the importance of diversity within the larger community while simultaneously elevating its importance specifically to the travel industry.

The association highlighted 19 INDIVIDUALS FROM 16 DIFFERENT ORGANIZATIONS OVER THE COURSE OF 2022—each of them bringing a unique experience to the table and sharing their vision for what a more diverse, equitable and inclusive travel industry would look like. In total, our DEI spotlight efforts REACHED OVER 68,000 USERS ACROSS SOCIAL MEDIA.

By year end, LEISURE AND HOSPITALITY REMAINED THE LAST PRIVATE SECTOR INDUSTRY TO RECOVER and was still short nearly 1 million jobs below pre-pandemic levels.

H-2B WORKER VISAS:

After urging the Biden administration to raise the cap on H-2B visas throughout the year, U.S. Travel applauded the announcement that the U.S. Department of Homeland Security (DHS) would make an additional 65,000 H-2B temporary nonagricultural worker visas available for 2023. This move marks the largest-ever supplemental visa increase and will serve as a lifeline for the travel industry ahead of the peak travel season. In December, Congress passed a government-wide funding bill, including a provision to allow the DHS to exempt returning H-2B workers from the annual H-2B visa cap, along with many other pro-travel provisions.
After 17 years at U.S. Travel, Roger Dow said goodbye as president and CEO in July 2022. We are appreciative of all of Roger’s contributions to U.S. Travel and the entire travel industry. Roger guided U.S. Travel and the broader industry through periods of remarkable growth—marked by 10 consecutive years of expansion from 2009 to 2019 and also helped successfully navigate tremendous challenges including the COVID-19 pandemic.

I’m proud and honored to succeed Roger Dow, who has been a profound leader and important mentor to me. I give Roger my sincere thanks for all he has done, for me and for the travel industry.
— GEOFF FREEMAN, U.S. TRAVEL PRESIDENT & CEO

On September 1, Geoff Freeman took the helm as president and CEO of U.S. Travel. Geoff has a track record of building talented teams and delivering game-changing results. He rejoins U.S. Travel after nearly a decade of association leadership—first as president and CEO of the American Gaming Association and then as the president and CEO of the Consumer Brands Association. His earlier work alongside Roger led to the passage of the Travel Promotion Act in 2009, the launch of the Meetings Mean Business Coalition and other programs that significantly improved travel facilitation and security.

On K Street: The U.S. Travel Association has tapped Geoff Freeman

U.S. Travel Association bids soulful goodbye to Roger Dow

U.S. Travel Hires Industry Association Veteran Geoff Freeman as Next CEO
In late 2022, the board unanimously approved membership governance changes. Moving forward, the “Executive Board” was established to serve as the governing body of U.S. Travel with the management responsibilities and legal obligations previously assigned to the Board of Directors, now referred to as the “the Board”, legally noted as the Board of Delegates.

**U.S. TRAVEL HELD THREE BOARD MEETINGS THROUGHOUT THE YEAR.** U.S. Travel held three board meetings throughout the year (Spring in Washington, D.C.; Summer in Puerto Rico; Fall in Washington, D.C.). In November, we convened nearly 150 board members during our fall meeting, with a reimagined format encouraging active participation to help shape the future of the association. This was a consensus building meeting on how we can establish travel as essential, advance seamless and secure travel and shape enduring “macro” issues. The discussions and feedback received will help shape the association’s future board gatherings and advocacy agenda.

**SUMMER MEETING**

**SPRING AND FALL MEETING**
Our members represent all components of the travel industry, including transportation, lodging, retail, recreation, entertainment, tourism offices and destination marketing organizations (DMOs).

96% RETENTION RATE
152 NEW MEMBERS IN 2022
The largest increase in 11 YEARS.

PREMIER LEVEL MEMBERSHIP
Our premier level membership, those at the Chairman’s Circle, Board Circle and Association Board Circle levels, grew by 22 members. This year, we saw the highest number of DMOs joining as new premier members since 2008.

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MEMBERSHIP HIGHLIGHTS
PREMIER LEVEL
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