



This week

Today, Senator Cortez Masto (D-NV) and Senator Cramer (R-ND) introduced the [Hospitality and Commerce Job Recovery Act of 2020](#), a bipartisan bill that will provide targeted economic relief for struggling travel-related businesses. The bill includes improvements to the Employee Retention Tax Credit and several targeted tax credits and deductions for hard-hit travel businesses and workers. U.S. Travel is [strongly supportive of this bill](#), and worked closely with both Senators' offices during the development of this jobs focused legislation which aligns with many of our top legislative priorities.

In addition, U.S. Travel and the [COVID RELIEF NOW Coalition](#) continue to put as much pressure as possible on Congress and the administration to reach a deal to provide COVID relief immediately. **It is essential that members of Congress hear from YOU!**

Use our [suite of COVID RELIEF NOW materials](#) to help get this message to Congress, including an updated [social guide](#), [messaging points](#), [fact sheet](#) and [action alert](#) that we encourage you to send now.

Next Monday, we are coordinating a targeted social campaign and are asking that all travel businesses and workers message your member of Congress with the provided copy on Twitter and Facebook at 12PM EST on OCTOBER 19.

JOIN THE TWEET
CAMPAIGN

WHEN IT'S TIME FOR YOU, WE'LL BE READY



The [Let's Go There campaign](#) is preparing for the next round of messaging and toolkit materials, slated for release in mid-November, with holiday-inspired messaging and imagery focused on capturing the joy evoked by planning, booking and ultimately traveling. Stay tuned for more information to come on how to engage and keep the momentum going.

[Resources](#) remain available for industry use.

TOOLKIT

Good News for Viral Spread on Commercial Planes

October 7, 2020

- **Aircrafts with HEPA filtration and a very high air exchange rate of every two to five minutes have particle spread rates that are even lower than conventional indoor settings**
- General Stephen Lyons stated that “being on a commercial airplane with HEPA filtration is probably one of the safest places that you can be”
- Once the full test results are reviewed by the Defense Department's COVID-19 task force they will help inform procedures for passenger transport and the contact tracing requirements needed for specific aircraft
- The findings will be used to develop strategies like cabin loading and seating configurations to mitigate potential risk of inter-person transmission of the aerosol particles

Source: [Military.com](#)

ECONOMIC IMPACT: A WEEKLY ANALYSIS

[Analysis by Tourism Economics shows](#) a week-by-week outlook on travel spending in the U.S. The analysis also looks at regional and state-by-state breakdowns.

- **Travel spending growth slowed to 2% last week following its 5% expansion the prior week**
 - In the week ending October 10, travel spending rose to \$13.1 billion—the highest level seen from a non-national holiday week since the beginning of the pandemic
 - Travel spending losses are currently on par with September, which would result in approximately \$41 billion in losses for the entire month of October
 - Travel spending measured 41% below last year's levels (a \$9.1 billion loss), a slight improvement from the 42% drop in the prior week
 - Since the beginning of March, the COVID-19 pandemic has resulted in \$415 billion in cumulative losses for the U.S. travel economy
 - Hawaii, D.C., New York, Massachusetts and Illinois continue to experience losses exceeding 50%
 - Most states experienced moderate gains or slight losses. Mountainous states with many outdoor activity options experienced notable gains, including South Dakota, Montana, Idaho, North Dakota, Wyoming, Utah and Colorado
 - The continual depressed level of travel spending has caused a loss of \$53.3 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

ESTO: Storytelling During COVID: Cost-Effective Approaches to Engagement

Thursday, Oct. 22, 2020 | 2:00 p.m. ET

COVID-19 has disrupted travel marketing in unimaginable ways, but our travelers are still seeking inspiration. Ryan Thompson, senior vice president for Miles Partnership, will share how to continue to tell stories during COVID-19 and do so in a cost effective and informative way.

Key takeaways will include:

- Managing video on a smaller budget
- Remote production when an "on-set" option isn't possible
- Empowering your audiences to become your storytellers
- Masks—show them or not?

REGISTER

Stay tuned for more details about our next Assessing Recovery webinar. Access all recordings on our [Assessing Recovery series webpage](#).

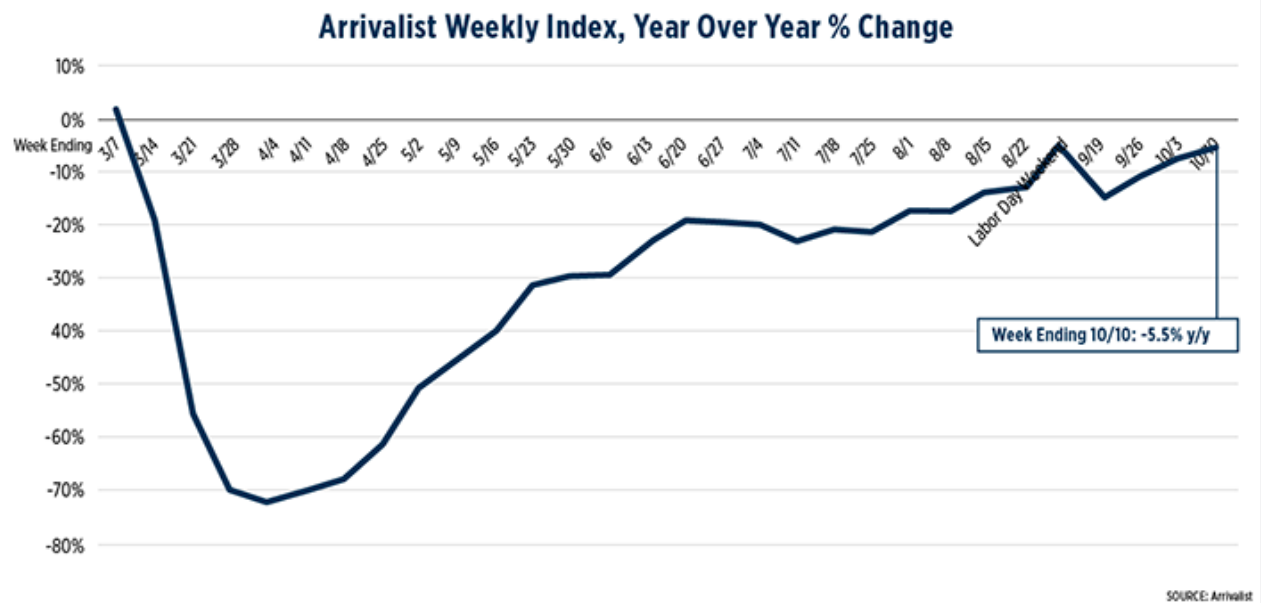
TRACKING TRAVELER TRENDS

Air travel picked up its pace of growth (+12% weekly change), and its year-over-year (y/y) rate (-65%) continued to inch slightly better but remains deep in negative territory. Road travel improved again (-5.5% y/y) and is nearing pre-pandemic levels for the first time this year. Domestic as well as international bookings for future air and hotel travel improved compared to the prior two weeks but were still deep in negative territory at -62% y/y and -77% y/y, respectively.

Road Travel: Daily Travel Index

Arrivalist's [Daily Travel Index](#) measures consumer road trips of 50 miles or more in all 50 U.S. states.

- **Road travel improved further last week (on a y/y basis) and is nearly at 2019 levels**
 - Road travel was only 5.5% down y/y last week, which is, by far, its best performance in any week since the start of the pandemic other than Labor Day weekend
 - The latest y/y declines reflect a significant improvement from lows of -70% y/y in early April



DAILY TRAVEL INDEX

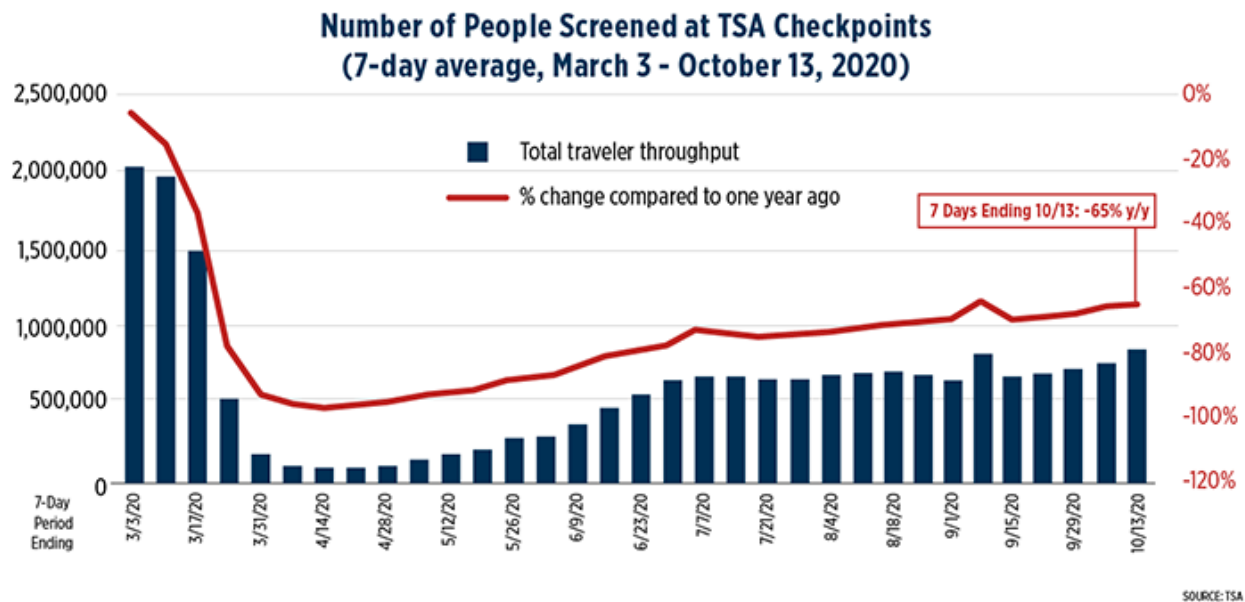
Source: [Arrivalist](#)

Passenger Screenings at TSA

The [Transportation Security Administration](#) (TSA) updates passenger screenings on a daily basis, providing a comparison to the same time last year.

- **The latest seven-day average of daily screenings (through Tuesday, October 13) reached a new pandemic high of 852,000**

- Screenings were up 12% last week compared to the previous week; the increase may be partly attributed to the Columbus Day holiday
- Screenings over the last seven days were 65% lower than in the same period last year, better than any other week since March except Labor Day (-64%)



Source: [TSA](#)

Hotel and Air: Traveler Trends Tracker

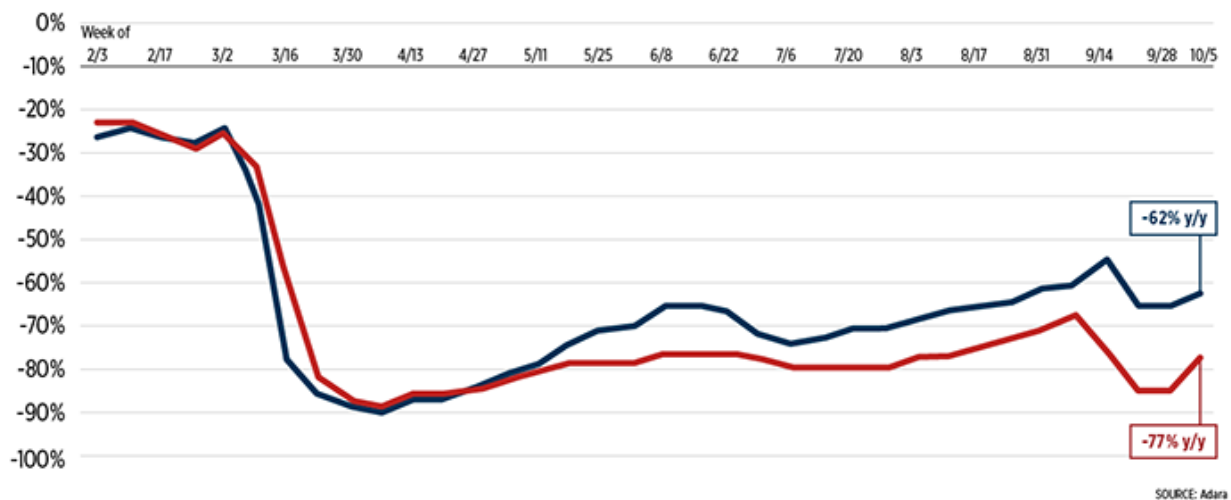
ADARA's [Traveler Trends Tracker](#) taps into real-time travel data on travel-related consumer behavior including hotel volume and flight bookings for both business and leisure travel. Updated daily.

In addition, ADARA directly provides U.S. Travel with national and state-level booking data, summarized below:

- **Domestic air and hotel bookings for future travel (-62% y/y) improved slightly from the past two weeks but were still worse than early September levels**
- Regional differences remained similar to previous weeks
 - Domestic bookings to Montana (-27%), Wyoming (-27%) and South Dakota (-35%) experienced the lowest y/y declines and improved compared to the previous week, but were similar to the week of Sept. 21

- Domestic bookings to New York (-81%), Massachusetts (-74%) and Maryland (-73%) again experienced the highest declines, performing slightly better than the previous week but roughly the same as the week of Sept. 21
- International bookings for future travel to the U.S. (-77% y/y) continued to fare significantly worse than domestic bookings, with slight improvements compared to the earlier two weeks but a worse performance than August and early September

Searches and Bookings For Travel To and Within the U.S., Year Over Year % change



TRAVELER TRENDS TRACKER

Source: [ADARA](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

October 11, 2020

- American travelers are less likely to visit a destination in the future due to current COVID-related issues than last month (34% - up from 28%)
- Despite rising cases in many areas of the country and increasing fears about the virus, **approximately 80% of American travelers report that they have at least tentative trip plans right now** and about 40% say their next trip will take place this fall
 - At least a quarter of American travelers report that leisure travel will be an essential or high spending priority in the next three months
 - More Americans than any other time during the pandemic period are now open to discounting as a travel motivator—a sign that American travelers are more open to travel rather than being firmly unwilling
- There has been a 10% increase in the last three months in the number of American travelers who say the most recent travel ad they saw made them “very happy” (29%)—while another 33% reported the ad made them “happy”
 - When it comes to travel advertising, nearly 70% feel positive or very positive about seeing travelers with face masks in travel ads, while less than 10% have a negative response
- When it comes to the resources travelers use to find information they need to travel safely, they cite friends and relatives (70%) followed by state tourism offices and local convention & visitors bureaus as their most trusted sources
- Adding mandatory COVID testing makes American travelers more likely to engage in a variety of travel activities, including commercial flights, sporting events, going to movie theaters and theme parks
- **Mandatory facemasks and social distancing are the most important activities** motivating travelers to take a flight in the next six months
 - Two-thirds considered other protocols such as testing and temperature checks to be important or very important

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

October 13, 2020

- **Nearly half of American travelers (48%) indicate that they will stay home this holiday season.** Reports of a significant rise in new cases of COVID-19 in a majority of states, as well as requests from government and health officials around the country to limit the size of holiday season gatherings, are having an impact on initial holiday travel sentiment
- Of those who say they plan to travel during the holidays, 41% plan to travel by car, while 19% intend to fly
- Concerns that economic factors will greatly impact decisions to travel this winter remain consistently low at around 20%
- About half of respondents (49%) say they feel safe dining and shopping locally (a key factor in restoring consumer confidence to travel)

Source: [Longwoods International](#) supported by Miles Partnership

Back-to-Normal Barometer

October 14, 2020

- **A vaccine or therapeutic treatments to mitigate the effects of COVID-19 provide the most reassurance for travelers to feel comfortable staying in a hotel or flying again**
 - Nearly one-third (34%) of travelers would be much more likely to fly domestically if all passengers and employees tested negative for COVID-19 immediately prior to flying
 - One-quarter of travelers (26%) would be much more likely to attend a conference if all attendees and employees tested negative for COVID-19
- Six in 10 strongly agree that their employers should make it easy to obtain a COVID-19 vaccine once available
- Nearly six in 10 (58%) are strongly concerned that there will be a second wave of COVID-19 outbreaks requiring event cancellations and lockdowns this year
 - Yet less than half (49%) said that they will definitely get a COVID-19 vaccine when it becomes available

Source: [Engagious](#)

Cautious Optimism for Fall Travel

October 15, 2020

- **American travelers are making vacation plans through the end of the year but remain cautiously optimistic about their travel plans**
- Two-thirds of Americans planning a vacation before the end of the year reported some degree of uncertainty they will actually be able to take their vacation
- As a result, many trips are being booked last minute: one in five Americans planning a trip before the year's end are doing so within one week of traveling
- Eight in 10 trips this fall are expected to be road trips, primarily to destinations known for outdoor recreation activities

Source: [AAA](#)

iMeet Survey of Meeting Planners

October 11, 2020

- **The percentage of planners who believe they will resume face-to-face meetings by the end of the year improved to 16% this week—up from 10%**
- More than half of planners have one or more request for proposals for the future in progress and 72% of planners have at least one future face-to-face meeting contracted
- Looking into 2021, 40% of planners are targeting the first half of 2021 to resume face to face meetings (down from 55% last week), with the majority (33%) targeting Q2

Source: [iMeet](#)

Travel Intentions Pulse Survey (TIPS):

This survey measures current and future traveler sentiment amid the COVID-19 pandemic, tracking trends and shifts in travel intentions. The study polls respondents for both domestic and international travel intent by purpose and type.

SOURCE: MMGY Travel Intelligence

[VIEW LATEST RESULTS >](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [U.S. Lodging Market Trends October 3](#) | JLL
- [Hospitality Asset Managers on COVID's Impact and Recovery Timeline](#) | Lodging Magazine
- [Connecting with Travel Shoppers on Cyber Monday 2020](#) | Expedia Media Group Solutions
- [Why Are the Borders Still Closed Between the U.S. and Europe and When Will They Open?](#) | AFAR

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **October 19 at 12:00 p.m. ET** | [Anxiously Awaiting the Election: Back to Normal Barometer Briefing](#) | Engagious
- **October 20 at 1:00 p.m. ET** | [Resuming Travel Best Practices](#) | BTN Group Content Solutions
- **October 21 at 1:00 p.m. ET** | [2021 Hotel RFP's: Options to Explore](#) | BTN Group Content Solutions
- **October 21 at 2:00 p.m. ET** | [Incorporating an Equity, Diversity and Inclusion Strategy to Enhance Organizational Culture](#) | Destinations International
- **October 21 at 3:00 p.m. ET** | [Autumn Road Trips – Lucrative and Unforgettable](#) | AmericanTours International and Travel South USA
- **October 22 at 12:00 p.m. ET** | [Virtual Conference Carpe Data: Anatomy of a Travel Recovery](#) | ADARA
- **November 3 at 3:00 p.m. ET** | [Funding Futures: Dedicated Funding and Tax Increment Financing](#) | Miles Partnership, Civitas Advisors and Tourism Economics
- **November 17 at 12:00 p.m. ET** | [Now That the Votes Are In](#) | Kantar
- **November 22 at 1:00 p.m. ET** | [Virtual Insights Summit: North and Latin America](#) | Expedia Media Group Solutions

QUESTIONS?

Access top findings each week on our [COVID-19 Travel Industry Research webpage](#).

Please [submit any questions](#) to us. We will do our best to reply in a timely manner.

You received this email because you participated in a recent webinar or have a relationship with U.S. Travel Association. If you have a colleague who would appreciate receiving these updates, please have them [sign up here](#).