



This week

U.S. Travel continues to closely monitor the results of the 2020 election, from the presidential race, to the Senate and House race developments at the state level, all with an eye on how this may affect our industry. The work we have done to engage with campaigns and amplify our important priorities leading up to this election have left us prepared for any outcome.

We have robust plans underway to educate new members of Congress and a new or renewed Administration. We also have materials ready—including our new, ambitious and innovative Power of Travel platform to help advance key travel priorities so our industry will be best positioned and at the forefront of important policy conversations in 2021 and beyond.

In the near term, we do have reason to believe that there is an increased possibility for a recovery package during the lame duck Congressional session, which was [echoed this week](#) by Senate Majority Leader Mitch McConnell. U.S. Travel and other members in the [COVID RELIEF NOW Coalition](#) will do everything in our power to move this forward quickly.

Thanks to all of you who have engaged over the last several months—we are so appreciative of your efforts—and we must keep working together.

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



NEW TOOLKIT AVAILABLE: The [Let's Go There Coalition](#) has released a toolkit under the theme [Let's Go There, Together](#)—focused on family travel and giving the gift of travel. Find inspiration and ways to get involved through the editorial calendar, graphics and sample social media copy, as well as other resources. **This new iteration of the campaign will launch on November 16 with a homepage takeover.**

NEW TOOLKIT

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 ended its two-week slide last week and grew 3% from the prior week**
 - In the week ending October 31, travel spending tallied just \$12.9 billion and reflected a 42% drop below last year's levels (a \$9.3 billion loss)—an improvement from the 44% drop in the prior week
 - Since the end of the summer travel season, weekly travel spending has remained relatively flat, with the percentage loss oscillating between -45% and -41% in each of the past eight weeks
- Many Midwestern states that had been regressing in recent weeks experienced strong rebounds, with Montana, Iowa, Wisconsin and Minnesota among the biggest gainers

- The slow return of air travel has been a boon for Puerto Rico, which had been among the five worst performing states and territories for much of the pandemic and is now in the middle of the pack
- October concluded with \$41.6 billion of travel spending losses—a 6% increase from September and the first increase in monthly travel spending losses since April
- Since the beginning of March, the COVID-19 pandemic has resulted in \$443 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$57 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

U.S. Travel's bi-weekly Assessing Recovery webinar series looks towards the recovery of the travel and tourism industry and the broader economy. The webinars focus on the guidance and data necessary to safely restore travel in the U.S. [Access all previous recordings here.](#)

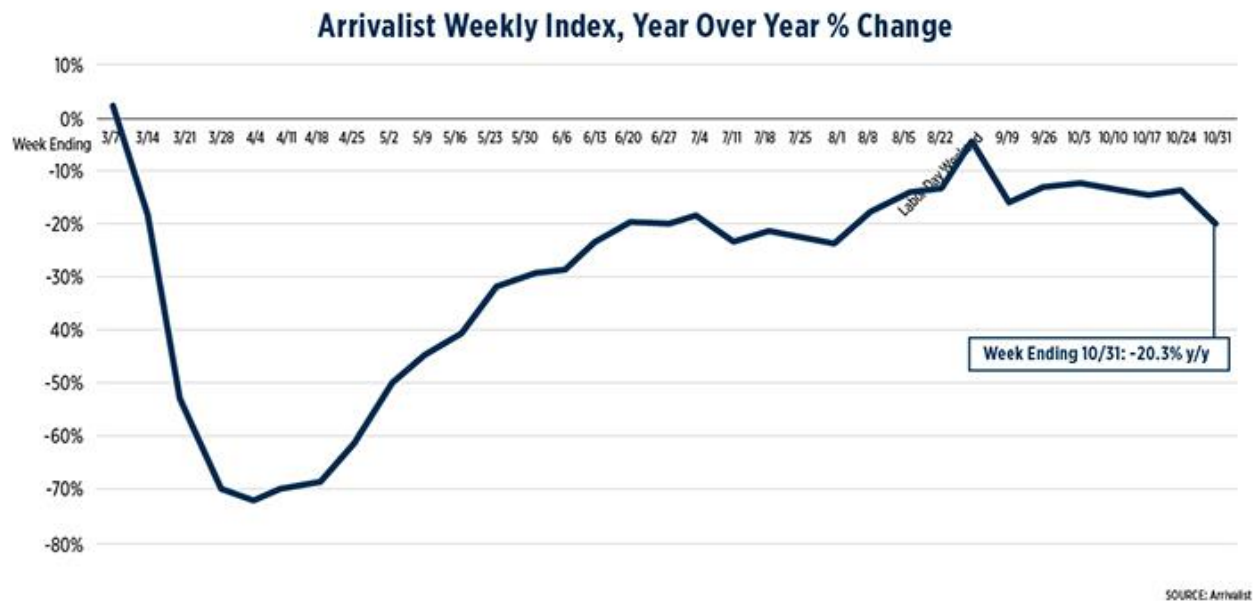
TRACKING TRAVELER TRENDS

The latest travel indicators all performed slightly worse last week than over the past couple of weeks, likely due to rising COVID-19 cases and a general sense of pessimism about the course of the virus.

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 declined moderately last week on a year-over-year (y/y) basis**
 - Road travel was 20% down y/y last week, significantly lower than in recent weeks, and had its worst performance since the end of July



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.

- **Daily TSA screenings slowed down significantly last week, as can be expected leading up to the holiday season, but also declined slightly on a y/y basis, which remains significantly lower than last year**
 - The latest seven-day average of daily screenings (through Tuesday November 3) was 8% lower than the previous week and 64% lower than the same period last year (slightly worse than the 63% y/y decline the prior week)
 - The 64% y/y decline marks the first reversal in y/y improvement in two months, but it was likely influenced by a considerable slowdown in travel on Election Day (-71% y/y) compared to the same weekday last year



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 declined from -56% y/y in the previous week to -60% y/y**
- **Regional differences remained strong:**
 - Domestic bookings to Wyoming (-16%), Montana (-18%) and Idaho (-35%) again experienced the lowest y/y declines
 - Domestic bookings to New York (-81%), Massachusetts (-74%) and Connecticut (-72%) again experienced the highest y/y declines
- International bookings for future travel to the U.S. declined from -60% y/y in the previous week to -63% y/y

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

November 2, 2020

- Six in 10 Americans (61%) expect that the pandemic situation will get worse in the next month, up more than five percentage points in one week
- The worsening feelings about the pandemic continue to negatively impact sentiment towards travel in the near-term:

- **Less than half (48%) agree they are excited about taking a getaway in the next month and openness to travel inspiration decreased again (44%)**
- Confidence in being able to travel safely in the current environment eroded five percentage points in the past three weeks (27% from 32%)
- Half agree that traveling right now feels irresponsible and over 40% feel guilty traveling
- The declining sentiment towards travel has also affected behavior, including for the upcoming Thanksgiving holiday:
 - **While 14% definitively say they will travel for Thanksgiving, down slightly from 16% the week of August 17, those that felt uncertain about it in August have largely decided to stay home**
 - Of those traveling for the holiday, nearly 80% primarily plan to spend time with friends and family in their homes
 - While half plan to stay in a home of a friend or relative, 18% say they will stay in a luxury hotel and the same percentage plan to stay in a 3- or 4-star hotel
- **Most respondents agree that they plan to travel more domestically and prioritize travel with family over the next two years (following the pandemic) more so than before the pandemic**
 - Nearly a quarter wish to visit more destinations on their bucket list and have new travel experiences

Source: [Destination Analysts](#)

Americans Adapting Holiday Travel Plans

October 31, 2020

- **As concerns over the coronavirus remain high, there are few signs of individual behaviors changing**
 - **The number of Americans that have visited friends or relatives (49%), gone out to eat (42%) and self-quarantined (14%) is stable compared to the past few weeks**
- Concerns are emerging about the holiday season, with two-thirds (68%) making adaptations to how they will celebrate and changing how they view holiday travel
 - Two-thirds say traveling for the upcoming holidays poses a large or moderate risk

- More than half of Americans (54%) have begun to make plans about how they will celebrate the holiday season
- The most common adaptation for Thanksgiving celebrations are having a smaller gathering (35%) and not seeing family or friends they normally would (21%)
- A slim majority, 52%, say they are celebrating Thanksgiving this year with just their immediate family. More than one in 10 (14%) are not planning to celebrate at all

Source: [Ipsos](#)

iMeet Survey of Meeting Planners

November 1, 2020

- **The percentage of planners with a request for proposal in progress and with at least one future face-to-face meeting declined slightly to 45% and 70%—down from 49% and 74%, respectively**
- The percentage of planners who believe they will resume face-to-face meetings by the end of the year declined to 10% this week
- Looking into 2021, fewer than four in 10 (37%) planners are targeting the first half of 2021 to resume face-to-face meetings, with the majority (27%) 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
- [10 Traveler Trends for 2021 Planning](#) | Sojern
- [September Market Kalibration](#) | Kalibri Labs
- [How COVID-19 is Reshaping Attraction Experiences](#) | STR Data Insights
- [2021 World's Best Cities](#) | Resonance Consulting
- [COVID-19 Vaccination Intent is Decreasing Globally](#) | Ipsos

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **November 10 at 2:00 p.m. ET** | [Planning for the New Normal: Business Travel in 2021](#) | BTN Group Content Solutions
- **November 10 at 2:00 p.m. ET** | [Global State of Mobile](#) | Comscore
- **November 12 at 3:00 p.m. ET** | [Welcoming Customers This Holiday Season and Beyond](#) | American Express
- **November 13 at 2:00 p.m. ET** | [Group Business Insights, November 2020](#) | Cvent
- **November 17 at 12:00 p.m. ET** | [Now That the Votes Are In](#) | Kantar

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](#).