



This week

The [Let's Go There Coalition](#) continues to move toward launching an industrywide recovery campaign on September 8, the day after Labor Day. This campaign aims to reignite Americans' sense of wanderlust and inspire them to look ahead to—and start planning for—their next trip.

Today, the Coalition released the first set of [toolkit resources](#), available at no cost, for the entire industry to use starting September 8. Two versions are available:

- [Let's Go There](#): This version can be used by those brands, businesses and organizations who are ready to market and promote planning and booking to travelers.
- [Let's Go There, Soon](#): This iteration is a full complement to the Let's Go There campaign that can be used by destinations, organizations and businesses who are more restricted in how they promote travel and are instead focused on providing inspiration for future planning.

Additional resources, including videos and a style guide, will be available in the days ahead.

Of note: the campaign will kick off with a [homepage takeover](#), to show unity across the industry and raise awareness of the Let's Go There message.

Grassroots Activation:

Congress is officially on recess through Labor Day, though [reports](#) suggest the administration, the U.S. House of Representatives and the U.S. Senate are restarting conversations on the next coronavirus recovery package.

We must do all we can—from sending [action alerts](#) to posting on [social media](#)—to ensure that when a final relief package is passed, it includes relief, protection and stimulus for the travel industry.

In the coming days and weeks we will be calling on you to continue making our voice heard to Congress and the administration. We are stronger when we communicate our needs to elected officials and we appreciate your ongoing engagement to support our advocacy efforts—it makes a huge difference.

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 stagnated last week and grew by less than 1%**
 - In the week ending August 22, travel spending tallied \$13 billion, which once again reflected a 44% drop below last year's levels (a \$10 billion loss)
 - The number of states and territories that experienced losses exceeding 50% remained at seven
 - The Northeast again experienced moderate to severe losses, with Connecticut witnessing the most acute downturn
 - Exceptions in the Northeast were Rhode Island, New Hampshire, Maine and Massachusetts, which featured modest gains
 - On the other hand, New York and New Jersey saw a flight passenger capacity reduction, limiting overnight visitors and inhibiting travel spending

- Since the beginning of March, the COVID-19 pandemic has resulted in over \$350 billion in cumulative losses for the U.S. travel economy, a rate of \$2 billion in losses per day
- The continual depressed level of travel spending has caused a loss of \$44.9 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

Let's Go There: Ways to Amplify the Industrywide Movement

There are many ways to engage with the Let's Go There campaign, launching on September 8. In addition to the [resources](#) available at no cost, there are several ways to support the campaign financially and receive additional customizable benefits. To help the industry learn more, the Coalition will be hosting a [webinar](#) next **Tuesday, September 1, at 1:00 p.m. ET.**

REGISTER NOW

For more information about the Coalition and the upcoming campaign, contact info@letsgothere.travel.

TRACKING TRAVELER TRENDS

Road and air travel declined relative to the previous week, likely due to typical end of summer slowdowns. On a year-over-year (y/y) basis, air travel continued to improve (slightly), but remains at -70% y/y. Bookings for

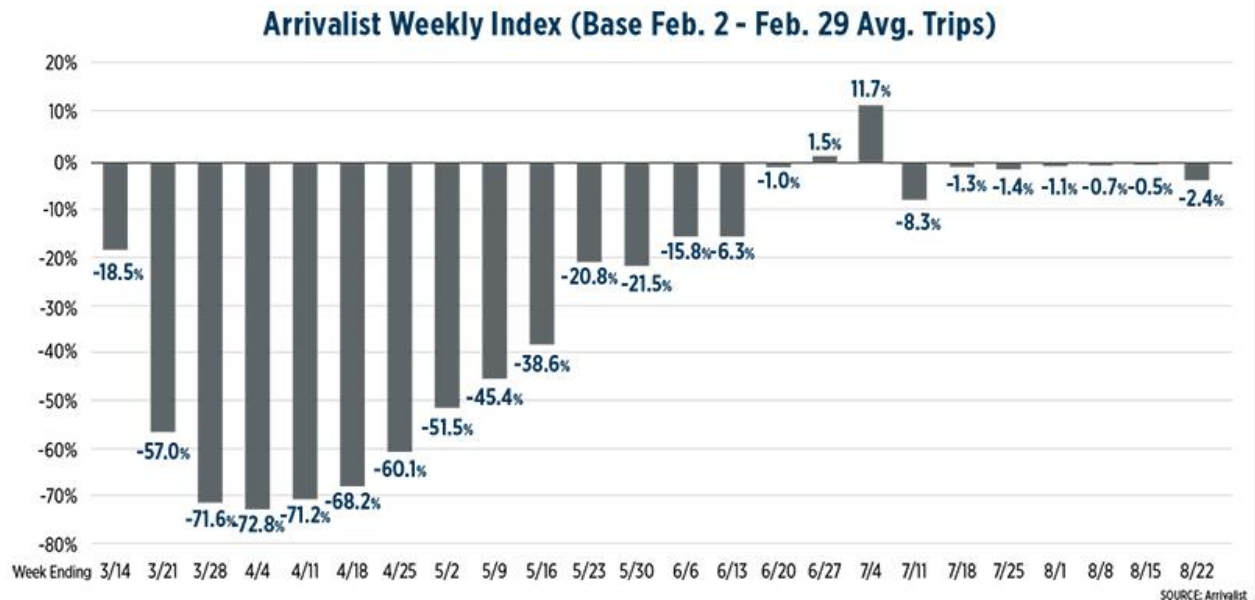
future travel remained roughly the same, again with vast regional differences. For the first time, one state (Wyoming) entered positive territory with regards future bookings.

Car: Daily and Weekly Travel Index

Arrivalist's Weekly Travel Index, prepared for U.S. Travel Association, measures consumer road trips of 50 miles or more in all 50 U.S. states.

- **Road travel last week declined slightly as summer travels started to slow down**
 - Road travel was 2.4% lower in the week ending August 22 than it was right before the crisis (in Feb. 2020), the lowest level since early July
 - While significantly improved from lows reaching -73% in April, August road travel should typically be significantly higher than February

Year-over-year data that will allow for a direct comparison to the same time period in 2019 will be available soon.



You can also view Arrivalist's [Daily Travel Index](#) here.

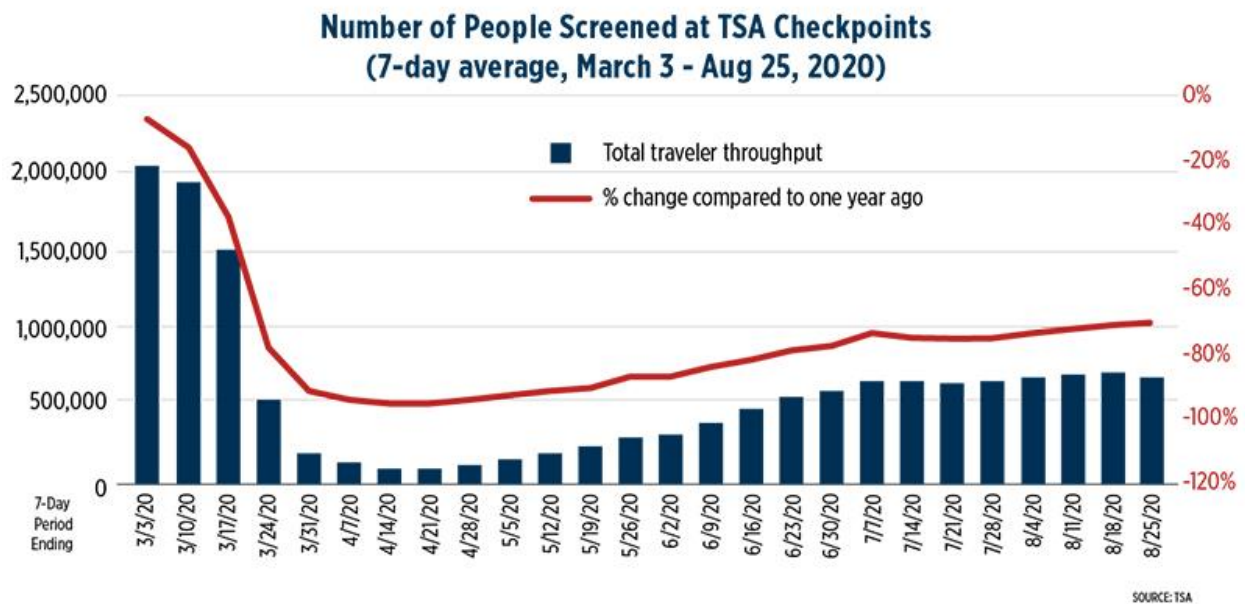
DAILY TRAVEL INDEX

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.

- **TSA screenings declined for the first time since mid-July as summer travel slowed down, but continued to improve (slightly) compared to the same period last year**
- The latest seven-day average of screenings (through Tuesday, August 25) was 692,000, 3.7% lower than in the previous week
- Screenings over the last seven days were 70% lower than in the same period last year (slightly improved from -71% last week and better on a y/y basis than any time since the start of the pandemic)

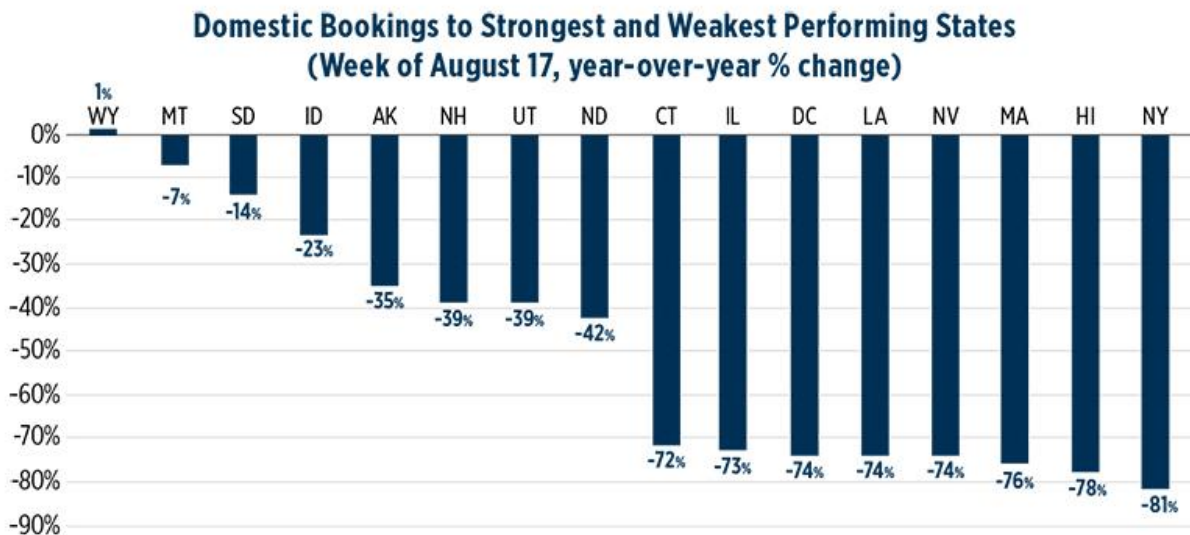


Source: [TSA](#)

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.

- Domestic air and hotel bookings for future travel remained roughly the same (-65%) on a y/y basis but regional differences continued to widen, with one state even entering positive territory
 - For the first time since the start of the pandemic, domestic bookings to a state entered positive year-over-year territory: Domestic bookings to Wyoming were 1% **higher** than in the same period last year (compared to -4% in the previous week).
 - Domestic bookings to Montana came in second at -7% (down from -5% the previous week)
 - Domestic bookings to New York (-81%), Hawaii (-78%) and Massachusetts (-76%) again saw the highest declines, with no significant improvement
- International bookings for future travel to the U.S. increased by 9% since the previous week, but were still -74% y/y



SOURCE: Adara

TRAVELER TRENDS TRACKER

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, U.S. Travel is offering an [exclusive dashboard](#) that monitors daily unique mobile devices across various points of interest at sample U.S. national parks, providing a breakdown of top origin cities and driving distances. This product can serve as a leading indicator to help destinations better understand American travel trends related to drive markets and outdoor recreation locations in the U.S. Of the parks captured within the dashboard, trends over the last week are showing:

- Travel across the sample of U.S. national parks declined 10% week-over-week. Since peaking on July 25th, there has been a 28% decline in visitation
- **Traffic to the national parks continues to be predominantly from tourists (75%) vs locals (25%), with 70+% driving over 100 miles to visit the park**
- Of those urban sites that have reopened, week-over-week increases in visitation have been driven largely by locals

NATIONAL PARKS DASHBOARD

Source: [Rove Marketing and Uber Media](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

August 25, 2020

- Optimism about the pandemic improving continued to grow this past week
 - 43% now feel it will get worse in the next month (down from 49% last week) and 22% feel it will get better (up from 18%)
 - Nearly one in five respondents (19%) feel the pandemic will be resolved before the conclusion of 2020
- **Just over half of respondents said they will be taking a regional trip under 200 miles this year while one third said they will be taking a staycation**

- Unfortunately, over half of “staycationers” said that this will mean mostly staying at home instead of exploring a different part of the country or staying overnight in a local hotel
- Half of respondents said they dined at a restaurant in the past two months and one fifth said they have visited an outdoor attraction
 - For both activities, less than 5% of those who report doing them said they felt unsafe during their experience
 - Among those who haven’t done them recently, about one third cited their concern about the behavior of others as a reason for their avoidance

Source: [Destination Analysts](#)

Back-to-Normal Barometer

August 19, 2020

- More than half of Americans (56%) feel that working from home has allowed them more personal time than they typically have
- **Yet, it can be stressful working from home and 22% think if their employer demanded they take more time off it would be less stressful**
 - **Vacation time is not being utilized in 2020—close to three-quarters (72%) agree that they are using less of their vacation time this year**
- Americans are feeling more comfortable with the idea of a vacation
- Half of Americans are either already active (12%) or ready to stay in a hotel (38%)
- Nealy one in five (18%) need some additional assurance from trusted sources and 32% need a medical breakthrough to feel comfortable
- Close to half of Americans (48%) are ready to attend conferences or conventions in person
 - Personal health is more of an impediment to attend conferences for women (77%) than men (38%). Four in 10 males believe clients unavailable to meet in person is an impediment to active business travel
- **There are many aspects of leisure travel Americans are missing, but the top-rated aspect mentioned by more than 6 in 10 leisure travelers (62%) is "having something to look forward to"**
- While many are hopeful they will be traveling this holiday season to spend time with family and friends, the vast majority will drive and do not feel comfortable flying yet

Source: [Engagious](#)

Consumer Behavior in the Time of COVID-19

August 19, 2020

- It appears many Americans have started to accept the current situation: 42% claim to have "adapted to the restrictions and settled into new routines"
- **Yet, uncertainty remains. More than 4 in 10 Americans (44%) "feel stuck about what to do next" or "have a lot of uncertainty" when planning of the future—up from 40% in the beginning of August**

Source: [Ipsos](#)

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.

[VIEW LATEST RESULTS >](#)

SOURCE: MMGY Travel Intelligence

INTERNATIONAL TRAVEL TRENDS

Anholt-Ipsos Nation Brand Index 2020

August 24, 2020

- **The majority of international travelers surveyed are more comfortable traveling domestically as opposed to internationally over the next five years. And those who feel comfortable enough to travel internationally in the next few years are more likely to visit nations which have made significant strides to contain the COVID-19 pandemic**
 - The only exception are Brazilians, who are equally split on their comfort level regarding domestic and international travel

- Based on this criteria, those surveyed said the top five nations they would feel most comfortable visiting in the next five years are: Germany, Switzerland, Canada, New Zealand, Japan

Source: [Anholt-Ipsos](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Survey: Hotel Industry's Enhanced Cleaning Protocols Putting Travelers at Ease](#) | American Hotel & Lodging Association conducted by Morning Consult
- [2020 Second Quarter Results](#) | Center for Exhibition Industry Research
- [State of Consumer Tracker](#) | Deloitte
- [State of U.S. Transportation During COVID-19](#) | International Bridge, Tunnel and Turnpike Association
- [COVID-19 and Transforming Tourism](#) | United Nations
- Article: [In Staycation Era, Regain Travel Customers' Trust](#) | Gallup

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | 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](#).