



This week

This afternoon, the most recent coronavirus relief package failed to pass the Senate. The relief package, offered by Senate Republicans, which included many provisions U.S. Travel and the industry have fought hard to secure failed mostly along party lines 52-47. We are greatly disappointed in this outcome; the travel industry desperately needs additional support to rehire Americans and reopen their businesses to drive America's recovery.

We must urge Congress to come together to pass a recovery package NOW—we simply cannot wait. **Tomorrow we will be calling on you to send an action alert to your Senators and Representatives urging them to act ASAP to pass legislation that provides our industry relief, protection and stimulus. We will also elevate efforts even further next week.** Thank you so much for your help during this critical time.

Global Testing Framework

U.S. Travel Association joined Airlines for America, the U.S. Chamber of Commerce and Airports Council International – North America, among others, in [sending a letter](#) to the Trump administration, calling for the establishment of a globally accepted framework for testing protocols in order to support the return of international travel.

Let's Go There

The [Let's Go There campaign](#) launched earlier this week to inspire Americans to *make plans to travel when the time is right*. Whether you're ready to welcome visitors or waiting until the next phase of your state's reopening, everyone in the travel industry is encouraged to join

this national conversation to reignite America's sense of wanderlust and the benefits it creates.

From [homepage takeovers](#) to [social media](#) engagement to top [media placements](#), campaign kick off was incredibly strong thanks to significant engagement of so many of you.

We must keep momentum going. The Let's Go There Coalition has a [suite of resources](#) for use by the industry, including social media graphics, sample website copy, a [participation checklist](#) and other ideas for ways to get involved. The Coalition has created two versions of these materials: [Let's Go There](#) for those who are ready to start promoting travel now, and [Let's Go There, Soon](#) for those who wish to participate but are not yet actively marketing to travelers. You can view the full toolkit(s) below.

TOOLKIT

ECONOMIC IMPACT: A WEEKLY ANALYSIS

Note: Travel spending data will be updated on Friday, September 11. Please check back on the [webpage](#) for the latest data. Find the [September 3 update](#) here.

U.S. TRAVEL WEBINARS

Optimizing Coronavirus Relief Funds

Thursday, September 17 2020 | 12:00 p.m. ET

On **September 17 from 12:00-1:00 p.m. ET**, join the U.S. Travel government relations team as they walk through how to navigate the process to access Coronavirus Relief Funds. Listen in to learn from your industry colleagues from across the country on how they are

working to gain access to relief, distributing the dollars and maximizing the resources for recovery efforts.

REGISTER

Access all recordings on our [Assessing Recovery series webpage](#).

TRACKING TRAVELER TRENDS

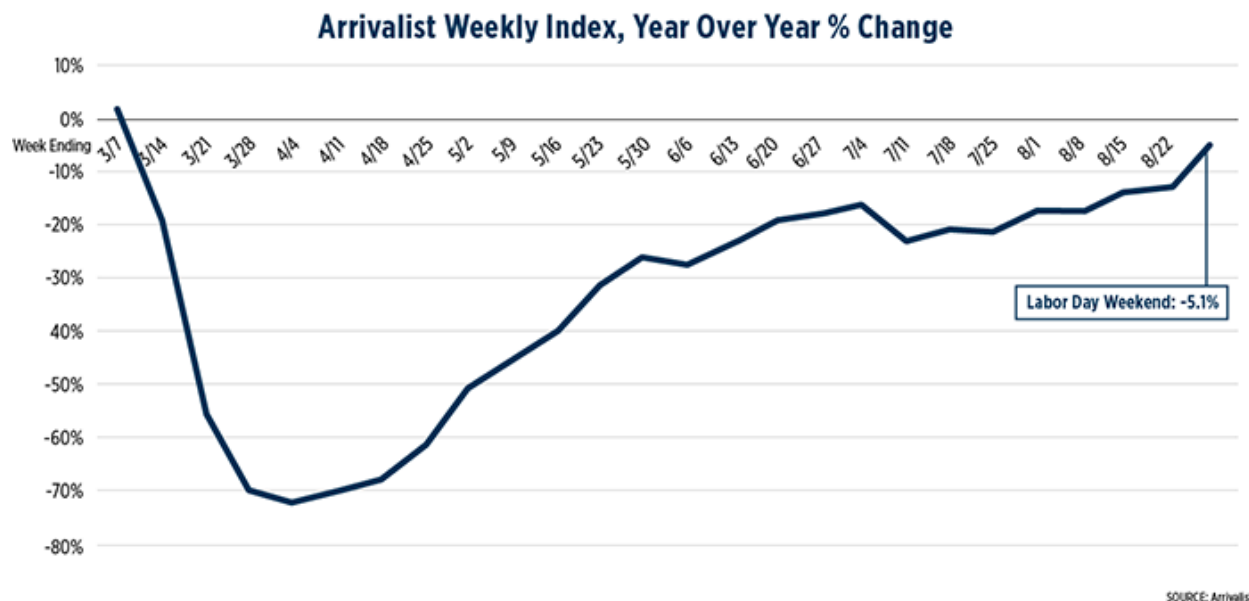
Labor Day holiday travel hit new pandemic highs. Road travel improved on a year-over-year (y/y) basis and was just 5.1% lower than Labor Day 2019, a significant improvement from the double-digit y/y declines of recent weeks. Meanwhile, TSA screenings reached their highest levels, by far, since mid-March. They remained 64% lower than Labor Day 2019 but this is a considerable improvement over the -70% (y/y) declines of recent weeks. Bookings for future air and hotel travel have continued to improve but remain deep in negative territory, again, with strong regional differences.

Road Travel: Daily Travel Index (Year-Over-Year Comparison Now Included)

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

- **Road travel over Labor Day weekend 2020 (Thursday to Monday) was just 5.1% lower than Labor Day weekend 2019**
 - This is, by far, the lowest y/y decline since the start of the pandemic

Please note: The Daily Travel Index (linked below) now presents year-over-year % changes in road travel. Data for the past two weeks, however, is influenced by the later timing of Labor Day in 2020 compared to 2019 and is not included in the chart. In its place, the above calculation (5.1% decline in Labor Day travel) is a direct comparison of Labor Day 2020 (Sept. 3-7, 2020) and Labor Day 2019 (Aug. 29-Sept. 2, 2019), provided by Arrivalist.



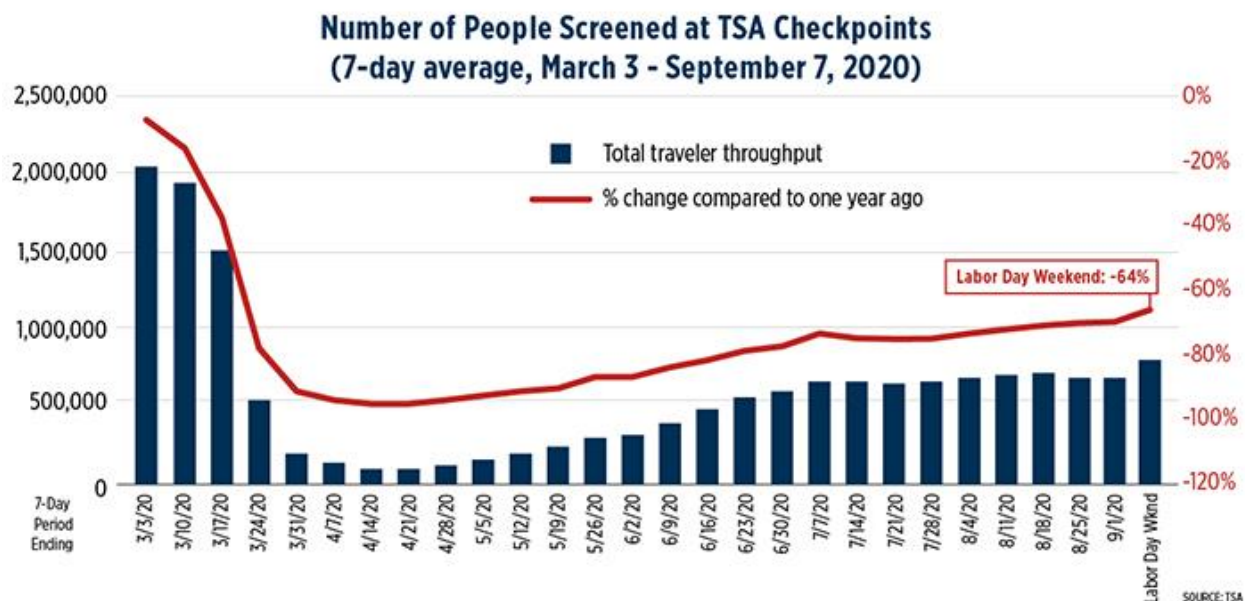
DAILY TRAVEL INDEX

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.

- **Labor Day travel hit new pandemic peaks**
 - **This past Friday (the busiest Labor Day travel day), TSA screenings reached 969,000, by far the highest number since the start of the pandemic**
 - Air travel over the Labor Day holiday travel period (Thursday-Monday) in 2020 was 64% lower than the same period in 2019; a significant decline but considerably better than the 70% y/y declines seen in recent weeks



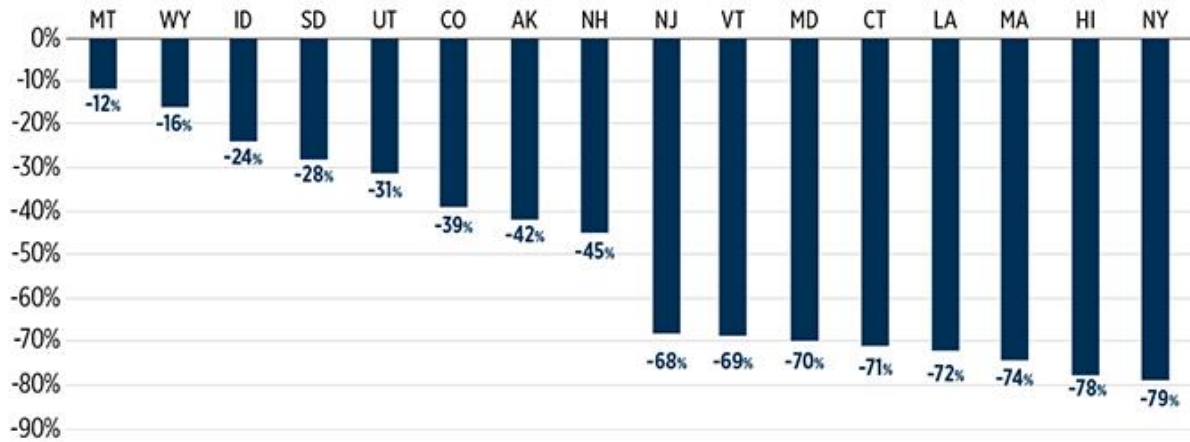
Source: [TSA](#)

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 have been slowly but steadily improving throughout the summer—from a low of -73% y/y in early July to -61% y/y at the end of August—but remain deep in negative territory**
 - Domestic bookings to Montana (-12%), Wyoming (-16%) and Idaho (-24%) experienced the lowest y/y declines, but all performed worse than the previous couple of weeks
 - Domestic bookings to New York (-79%), Hawaii (-78%) and Massachusetts (-74%) again saw the highest declines, with no improvements over the previous week
- International bookings for future travel to the U.S. improved slightly throughout the summer—from a low of -79% earlier in the summer to -70% y/y at the end of August—but remain significantly lower than domestic bookings

Domestic Bookings to Strongest and Weakest Performing States (Week of August 31, year-over-year % change)



SOURCE: ADARA

TRAVELER TRENDS TRACKER

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

Of the parks captured within the dashboard, trends over the last week are showing:

1. Significant spikes over Labor Day weekend (+ 47% vs last weekend)
2. Visitation to urban national historical sites is rebounding across the country, fueled largely by local residents
3. National parks are continuing to attract a large percentage of tourist with close to 75% driving over 100 miles (and 60%+ driving over 200 miles)

NATIONAL PARKS DASHBOARD

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Traveler Intentions Pulse Survey (TIPS)

September 4, 2020

- **The likelihood of traveling during the next six months increased since the previous July survey**
 - **Respondents' likelihood to take a domestic leisure trip during the next six months is the highest it has been since the survey's inception in mid-March, with 42% reporting they are at least somewhat likely to do so, up from 38% a month earlier**
 - The likelihood to take a domestic business trip during the next six months also increased—from 31% last month to 35% in the most recent wave
 - The likelihood to travel by personal car during the next six months was the highest it has been since the pandemic started, with three-quarters (75%) indicating they plan to do so
 - Almost two in five (39%) are willing to drive 300 miles or more (each way) for a leisure trip

Source: [MMGY Travel Intelligence](#)

Coronavirus Travel Sentiment Index Report

September 7, 2020

- **Perceptions of travel activities' safety—while still far from ideal—are the best they have been since the onset of the pandemic**
 - **Younger travelers and those in the South are the most confident about traveling safely**
 - **75% of respondents continue to report that they have at least tentative trip plans right now**

- **Close to one-third (32%) expect they will travel this fall season**
- **Openness to travel inspiration improved again this week**
- The proportion comfortable with tourists visiting their own communities is among the highest it has been during the pandemic
- Looking back on the summer, over one-third (35%) of respondents reported taking a leisure trip between June 1 and Labor Day
 - More than eight in 10 travelers reported staying overnight
 - While some of these travelers reported feeling unsafe at times, firsthand experience traveling over the summer provided a net increase in confidence that travel can be done safely
- In looking at when corporate travel might catch up to leisure travel, 24% of American travelers who work for companies in which employees travel for business say that business travel has started again
 - Of the three-quarters whose companies are not yet back to business travel, less than 10% have announced a timeline for return
 - While a quarter anticipate their company's business travel to return in January, nearly half expect that it will be in April 2021 or later

Source: [Destination Analysts](#)

Fall Travel Index

September 8, 2020

- While Florida and Arizona have always been popular destinations, there is significant y/y increase in travelers planning to visit this fall
- **Travelers are looking for short, last minute getaways with 55% booking two to five-night stays and often booking less than a week in advance**

Source: [Tripadvisor](#)

Consumer behavior in the time of COVID-19

September 3, 2020

- **When it comes to planning for the future, 41% of Americans feel stuck about what to do next or have a lot of uncertainty—down from 44% in mid-August**

- The outcome of the 2020 presidential election is now the number one perceived threat to the well-being of individuals and their families for 56% of Americans— ahead of health threats (53%) and economic concerns (49%)

Source: [Ipsos](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [Travel Safety Barometer](#) | MMGY Global Intelligence
- [What's Open for Travel? Destination Guide Map](#) | United Airlines
- [Lodging Recovery Analysis Updated September 8](#) | Kalibri Labs
- [Summer Travel Trends](#) | ValuePenguin by Lending Tree
- [Eating Out\(side\): Restaurant Dining in the Next Normal](#) | McKinsey & Company

UPCOMING INDUSTRY WEBINARS

- Ongoing | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- September 17 at 2:00 p.m. ET | [How Traveler Communication Supports a Safe Return to Travel](#) | American Express Global Business Travel
- September 28 at 1:00 p.m. ET | [Health and Safety Measures to #Stayprofitable](#) | Ipsos
- October 5-8 | [2020 Marketing Outlook Forum](#) | Travel and Tourism Research Association
- October 7-8 | Travel 2021 Summit: [Explore the New Face of Travel in a Virus-Weary World](#) | VRBO
- October 20 9:00 a.m.–5:00 p.m. ET | [American Express Business Class LIVE: Summit for Success](#) Virtual Event

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](#).