



This week

As negotiations remain stalled, U.S. Travel is asking the industry to call on Congress to provide small business relief at a minimum, before they are scheduled to leave Washington, D.C. later this month.

We are urging for the extension of the Paycheck Protection Program (PPP), expanding eligibility to destination marketing organizations of all statuses and to allow for a second draw on PPP for those businesses hardest hit.

We need your help. Please send an action alert right now to your member of Congress to highlight how critically important it is they work together to provide small business relief to help save travel organizations and rehire American workers.

SEND ACTION ALERT NOW

While we continue to push for a much needed broader recovery package, Congress should not abandon Main Street and small travel businesses at this time. With \$130 billion still available in PPP, but with the program having expired on August 8, it is simply irresponsible to leave so many hurting.

Visit America Act: Yesterday, the Senate Commerce, Science and Transportation Committee [advanced](#) the Visit America Act (S.3831) that was introduced by Senators Sullivan (R-AK) and King (I-ME). U.S. Travel strongly supports this legislation that would

increase tourism and elevate travel within the federal government. It would also require the development and implementation of a strategy to assist the travel industry to more quickly recover from the COVID-19 pandemic. [Learn more](#) about the bill.

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



The [Let's Go There commercial](#) appeared during both Monday Night Football games earlier this week. This widely televised event put the Let's Go There campaign message directly in front of the target audience: those who are ready to start looking ahead and begin dreaming about booking a future trip.

This premier placement follows a very successful launch last week, where more than 2,500 organizations joined the nationwide movement to inspire Americans to make travel plans when the time is right. The launch also secured coverage in several [notable publications](#). Find a recap of highlights below. For a chance to be featured in future weekly recaps, please [share how you're participating](#).

VIEW WEEKLY RECAP

We must keep momentum going. The Let's Go There Coalition has a [suite of resources](#) for use by the industry: [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

[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.

- **As the end of summer nears, travel spending hit its lowest levels of the past four weeks**
 - In the week ending September 12, travel spending tallied just \$12.7 billion, reflecting a 43% drop below last year's levels (a \$9.4 billion loss)
 - While significantly worse than the 30% year-over-year (y/y) decline in the prior week—which included the days leading into the Labor Day holiday—the 43% y/y decline remains consistent with performance for much of August
 - Actual dollar value travel losses were less than earlier weeks in August since travel spending levels generally decline with the conclusion of the summer travel season
 - Every state and territory saw a decline in travel spending compared to the prior week, but about half saw gains relative to two weeks prior
 - South Carolina, Louisiana, Georgia, Oregon, and Alabama experienced the greatest improvements over the past two weeks
 - New York, Washington, D.C., and Hawaii still experienced losses exceeding 50%
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$376 billion in cumulative losses for the U.S. travel economy
 - The continual depressed level of travel spending has caused a loss of \$48.3 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

Optimizing Coronavirus Relief Funds

Earlier today during the latest webinar in the Assessing Recovery series, U.S. Travel's government relations team reviewed the scope, guidelines and eligible uses for the Coronavirus Relief Fund (CRF), established by the CARES Act with \$150 billion for state and local governments. Several state-and city-level travel industry executives shared how they have been successful in gaining access to relief, distributing the dollars and maximizing the resources for recovery efforts. [View the full slide deck.](#)

FULL RECORDING

Stay tuned for more details about our next Assessing Recovery webinar, which will take place on Thursday, September 24, at 12:00 p.m. Access all recordings on our [Assessing Recovery series webpage](#).

TRACKING TRAVELER TRENDS

After experiencing the lowest y/y declines (-64%) since March, TSA screenings decreased in the week following the holiday, once again -70% y/y. Road travel performed much better than air travel over the holiday weekend (-5.1%).

New state-level data from Arrivalist shows that road travel performance was uneven among residents of different states. In fact, some even experienced significant growth compared to last year. Bookings for future air and hotel travel have continued to improve but remain deep in negative territory, again with strong regional differences.

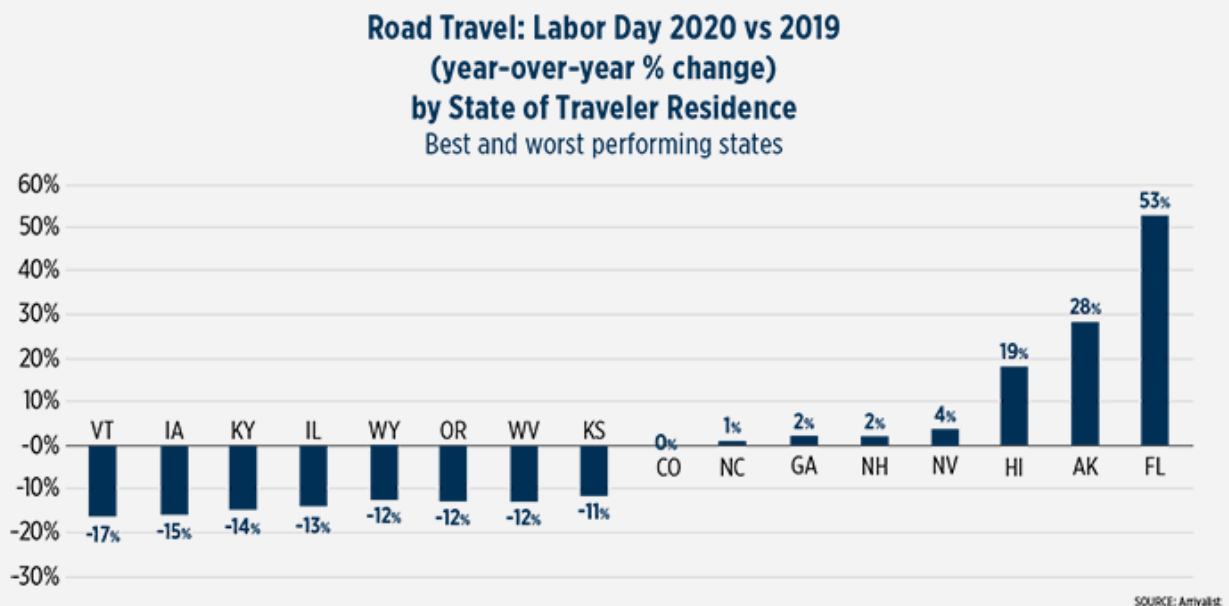
Road Travel: Daily Travel Index (Year-Over-Year Comparison Now Included)

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

Arrivalist also provided a direct Labor Day 2020 to Labor Day 2019 comparison.

- As shared last week, road travel over the Labor Day travel period (Thurs-Mon) was just 5.1% lower than in 2019
- **State-level data, by state of origin, is now available for the same Labor Day travel period and it shows extremely large differences between states**
 - Road travel by residents of Florida (both in-state and out-of-state travel) experienced the strongest y/y growth (+51%) while travel by residents of Alaska (+28%) and Hawaii (+19%) followed
 - On the other hand, travel by residents of Vermont experienced the largest y/y decline (-17%), followed by Iowa (-15%) and Kentucky (-14%)

Please note: The Daily Travel Index (linked below) now presents y/y % changes in road travel. Data for the latest week, however, is still influenced by the later timing of Labor Day in 2020 compared to 2019. For this reason, we are not including it in our summary this week and are instead focusing on direct Labor Day 2020 vs Labor Day 2019 comparisons. In particular, we are including state-level data (by origin/residence of travelers) provided to U.S. Travel directly by Arrivalist.



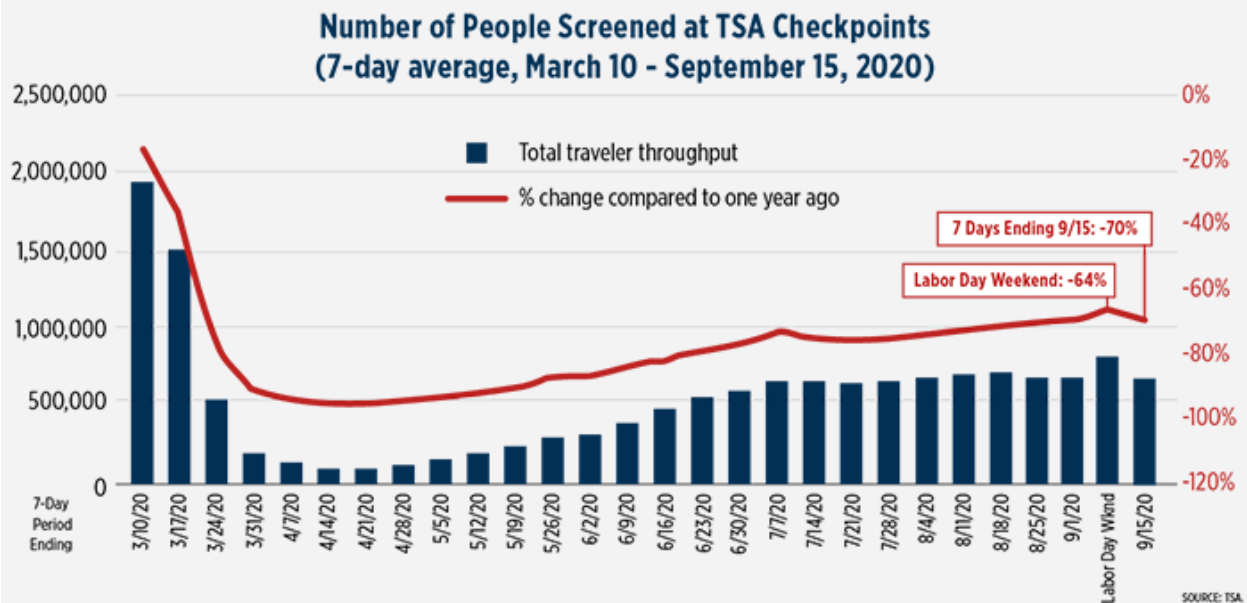
DAILY TRAVEL INDEX

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.

- The latest seven-day average of screenings (through Tuesday, September 15) was 683,000, similar to levels seen at the end of August (prior to the huge increase above 800,000 over Labor Day weekend) but slightly lower than most of August
- Screenings over the last seven days were back at 70% below last year levels, after the y/y improvement to -64% over Labor Day weekend



Source: [TSA](#)

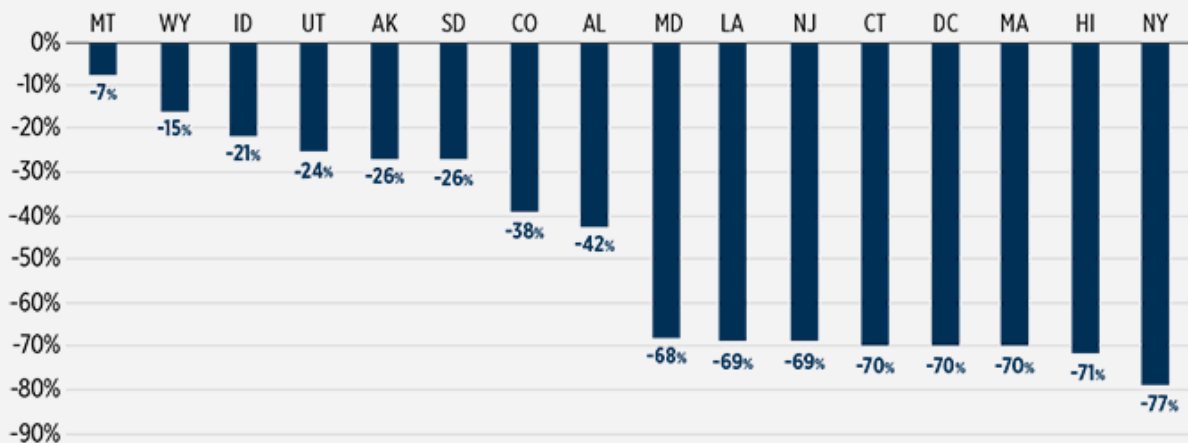
Hotel and Air: Traveler Trends Tracker

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 improved slightly (-60% y/y), as they have each week since early July—the best performance since the start of the pandemic but still deep in negative territory**
 - Domestic bookings to Montana (-7%), Wyoming (-15%) and Idaho (-21%) experienced the lowest y/y declines
 - Domestic bookings to New York (-77%), Hawaii (-71%) and Massachusetts (-70%), again, saw the highest declines
- **International bookings for future travel to the U.S. improved throughout the summer—from a low of -79% earlier in the summer to -67% y/y in early September—but remain significantly lower than domestic bookings**

**Domestic Bookings to Strongest and Weakest Performing States
(Week of September 7, 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:

- Visitation across the sample of U.S. National Parks **declined 36%** comparing the last two Saturdays: September 5 and 12
 - Saturday, September 12 was the lowest visitation count (measured by the number of unique mobile devices) since June 14
- The decline in visitation appears to have equally affected national historic parks and national parks
- Visitation from 100+ miles is decreasing week-over-week, likely attributed to many figuring out the new "back to school" routine

NATIONAL PARKS
DASHBOARD

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

National Tracking Poll: COVID-19 and Travel Sentiment September 15, 2020

- **Half of survey respondents now feel safe traveling outside their communities (up from 39% just four weeks ago), though only 43% support opening their communities to visitors**
- Among the many activities that travelers are planning to do this fall, visiting family and friends (66%) and taking a road trip (58%) are, by far, the most popular
- Other planned fall travel activities include: Visiting national/state parks (33%), viewing fall foliage (30%), hiking/biking (28%), visiting a farmer's market (27%),

visiting museums/art galleries (22%) and visiting a farm for fall harvest activities (22%)

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

Coronavirus Travel Sentiment Index Report

September 14, 2020

- Health concerns, while strong, remain the lowest they have been during the pandemic
 - The average rating of travel activities as “unsafe” continued to fall this week to the lowest levels since March 15; over 30% feel confident they can now travel safely and another 24% feel at least somewhat confident
- There has been a measured rise in the number of American travelers who are planning travel
 - This week, 78% report they have at least tentative trip plans—up from 75% last week
- **Among those who traveled by commercial airline this past summer, just over half (53%) report feeling unsafe against COVID-19 at some point during their flight.**
- **Among those staying at lodging properties, just 28% report feeling unsafe, while 73% report feeling safe, sometime during their stay**
- While it is a positive sign for the travel industry that well over a third of American travelers took trips this past summer, the pandemic negatively impacted travel spending
 - Over 56% of those who traveled over the summer said they decreased their spending to some degree, and 42% said they were more budget conscious

Source: [Destination Analysts](#)

Back-to-Normal Barometer

September 16, 2020

- There has been a significant uptick over the past month in the number of people who are ready to travel both for leisure and business

- Respondents expressed that they would be extremely more likely to partake in travel activities if everyone was given a rapid test and only those with negative results were allowed to participate, including:
 - stay at a hotel/resort (41%)
 - fly commercially (38%)
 - visit a theme park (34%)
 - attend a conference/convention (33%)
- Four in 10 respondents traveled over Labor Day weekend
 - Among those who didn't travel, about half said they don't typically travel for Labor Day weekend in any year, while the other half cited pandemic-related reasons for not travelling
- Among those who stayed at a hotel or resort in the last 12 months, more than half said they are either already doing this (17%) or are "ready to go" (42%)
 - On the other hand, 27% said they are waiting for a medical breakthrough while 14% said they are waiting for assurances from medical authorities and government that it is safe
- Among those who participated in a conference or convention in the last 12 months, 65% said they are "ready to go"

Source: [Engagious](#)

The Harris Poll CV-19 Tracker

September 13, 2020

- Despite media's portrayal of careless youth, nearly 8 in 10 (79%) Gen Zers say they are strictly following mask-wearing guidelines and are actively urging others to do the same
- Gen Z reported being most stressed out about the health of their family members and their friends (81%) as well as the well-being of the country as a whole (75%), more so than missing key milestones like graduation or prom (67%) or traveling (46%)
- Young people feel increasing anxiety to get back to normal: Three-quarters say being in limbo and facing uncertainty about the future is causing them a significant amount of stress

Source: [Harris Poll](#)

iMeet Survey of Meeting Planners

September 13, 2020

- **Planners who believe they will resume face-to-face meetings by the end of the year improved to 20%, up from 16% last week**
- Uncertainty around resuming face-to-face meetings is slowly improving and 15% of planners are targeting Q4 2020 for face-to-face meetings
- More than half of planners anticipate they will resume face-to-face meetings in the first half of 2021, with 19% resuming in Q1 and 36% resuming in 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.

[VIEW LATEST RESULTS >](#)

SOURCE: MMGY Travel Intelligence

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Evolving Travel Industry Marketing and Loyalty Programs](#) | Deloitte
- [Connecting Creatively with Travelers During Uncertain Times](#) | Expedia Media Group Solutions
- [U.S. Lodging Market Trends](#) | JLL
- [How COVID-19 is Changing the Holiday Shopping Season](#) | Morning Consult
- [U.S. Image Plunges Internationally](#) | Pew Research Center
- [Negativity Around Economy Higher Now than Great Recession](#) | Pew Research Center
- [World Tourism Barometer – August/September 2020](#) | UNWTO

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **October 20, 2020 9:00am–5:00pm ET** | [American Express Business Class LIVE: Summit for Success](#) Virtual Event
- **September 28 at 1:00 p.m. ET** | [Reviving Travel in Small and Midsize Companies](#) | Business Travel News
- **September 22 at 12:00 p.m. ET** | [Global Travel and Tourism Team Check In: United Kingdom](#) | U.S. Commercial Service
- **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

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](#).