



This week

Earlier today, 20 associations in the aviation and business community [sent a letter](#) to the administration urging them to work with international partners and state governors to implement appropriate COVID-19 pre-departure testing protocols in order to absolve the need for further quarantines and travel bans.

In a [recent International Air Transport Association survey](#), 83% of travelers said they would not travel if there is a chance of being quarantined at their destination, confirming this action is an extreme deterrent to restarting travel which will continue to have detrimental consequences for the U.S. economy and American jobs. Since the beginning of March, the COVID-19 pandemic has resulted in [\\$424 billion](#) in cumulative losses for the U.S. travel economy.

Continued border restrictions and quarantine measures for the traveling public are not the answer to combating the devastating effects of COVID-19, particularly when better alternatives exist. U.S. Travel [will continue to work](#) with our partners, stakeholders and industry, as well as state officials and the federal government on ways we can safely restart travel without compromising efficiency. Rebuilding the economy and creating jobs depend on it.

Also this week: The first international flight arrived in the U.S. using CommonPass, a digital health system that rapidly verifies passengers' COVID-19 status. U.S. Travel [supports](#) the use of innovative technologies to improve the safety of the travel experience.

Activating on Coronavirus Relief

Unfortunately, the Senate [failed to pass](#) two relief bills this week that would have provided \$500 billion for various forms of relief—including the option for a second Paycheck Protection Program (PPP) loan, \$16 billion for testing and contact tracing in states and liability protections for COVID-related claims, among other measures. Meanwhile, Secretary Mnuchin and Speaker Pelosi have resumed negotiations, though reaching a bipartisan agreement soon [seems unlikely](#).

The [COVID RELIEF NOW Coalition](#) continues to put extreme pressure on both Congress and the administration to come to an immediate agreement on a relief package that, at minimum, extends and expands the PPP, as well as second draw loans, ahead of the 2020 election. Just yesterday, the coalition [released an ad](#) highlighting this critical need.

We urge you to help us keep up the momentum—it is essential that we are as loud as possible right now in our demands for action. Use our [suite of COVID RELIEF NOW materials](#) to help get this message to Congress, including a [social guide](#), [messaging points](#), [fact sheet](#) and [action alert](#).

TAKE ACTION

Thank you to all those who have engaged and remain engaged to help ensure our industry is top of mind for lawmakers. We would appreciate if you activate however you can this week. As we look ahead to the more robust relief, protection and stimulus package we will work to accomplish in the Lane Duck session and beyond, we will be extremely grateful if you continue to work alongside us.

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



The [Let's Go There Coalition](#) continues to plan for future phases. The next iteration centers around "Let's Go There, Together" and will emphasize family travel (for those who are ready to travel now) as well as giving the gift of travel for future getaways. Toolkit materials will be released next week.

Additionally, Phase 3 of the campaign is slated for January, leading up to National Plan for Vacation Day on Tuesday, January 26, 2020. The development of a future iteration, "Let's Meet There," is also in the works, with the kick off meeting of this working group held initially this week. More details will be provided soon.

[Resources](#) from the initial phase of the campaign, remain available for industry use.

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 retreated 3% last week—ending a three-week consecutive growth streak**
 - In the week ending October 17, travel spending tallied just \$12.7 billion and reflected a 43% drop below last year's levels (a \$9.5 billion loss)—down from the 41% drop in the prior week
 - While air travel continues to rise steadily, road travel and hotel performance deteriorated
 - The lack of business travel will continue to weigh on travel spending

- Most states saw moderate declines but several states—mainly in the South—that had been slipping or stagnant in recent weeks experienced strong gains, such as Mississippi, Louisiana and Tennessee
 - States that have been seeing recent upturns in COVID-19 cases felt the most precipitous declines from the prior week, with North Dakota, Montana, Wisconsin and South Dakota experiencing the greatest declines
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$424 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$54.5 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

A Global Effort: The Road to Reopening International Air Travel

Wednesday, Oct. 28 | 12:00 p.m. ET

As the travel and tourism industry around the world continues to confront the effects of the coronavirus pandemic, significant strides are underway to restart global air travel when the time is right. Join the CEOs of the World Travel & Tourism Council (WTTC) and U.S. Travel Association and other industry leaders for a discussion in our Assessing Recovery Webinar series where they will address the necessary steps to kickstart air travel both nationally and globally. What role will COVID testing play? What initiatives are airports and airlines implementing to open up international routes while ensuring a safe and healthy travel experience? Bring your questions to what is sure to be a thoughtful and engaging session.

Featured speakers:

- Roger Dow, president and CEO, U.S. Travel
- Gloria Guevara, president and CEO, WTTC
- Huntley Lawrence, director of aviation, Port Authority of New York and New Jersey
- Aaron McMillan, managing director of operations policy and support, United Airlines

REGISTER

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

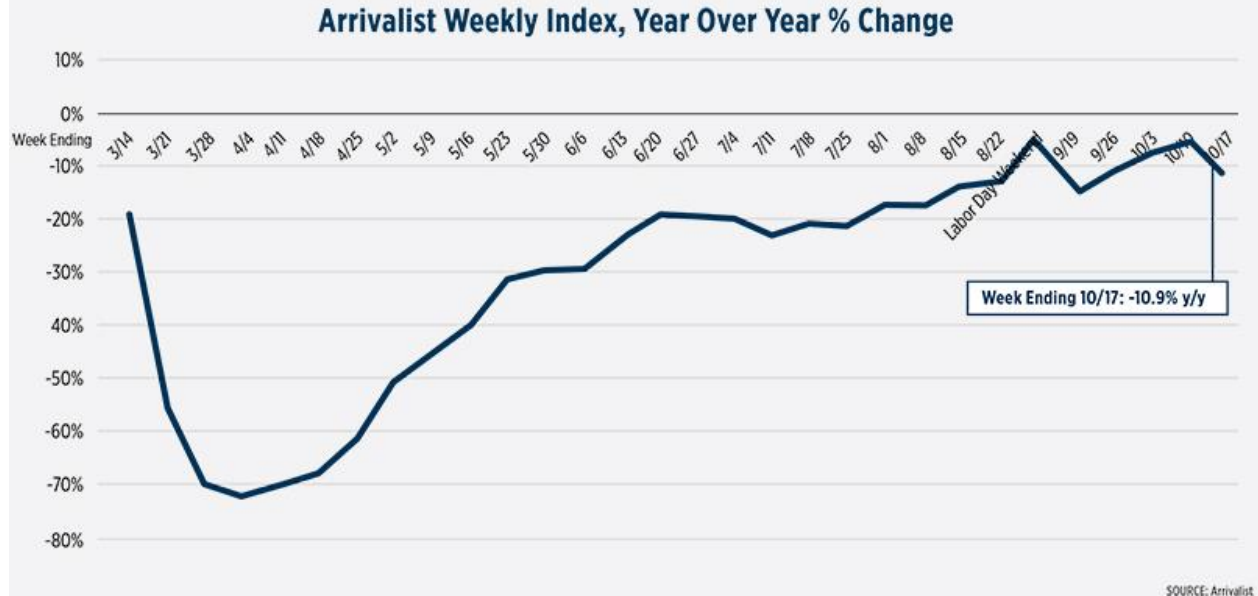
TRACKING TRAVELER TRENDS

Air travel finally passed the symbolic one million screenings mark this past Sunday but was still 60% below 2019 levels. Road travel remained stable but performed slightly worse than the past few weeks. Domestic as well as international bookings for future air and hotel travel improved again, with international bookings reaching a new pandemic peak of “only” -61% y/y (compared to -77% in the previous week and -84% two weeks earlier).

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 was slightly slower than previous weeks but remained just 11% below last year levels**
 - The latest y/y declines reflect significant improvements 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.

- **Daily TSA screenings surpassed the symbolic one million mark this past Sunday for the first time since March 16 but were still 60% below last year levels**
- The latest seven-day average of daily screenings (through Tuesday October 20) reached a new pandemic-high of 864,000
- Screenings over the last seven days were 64% lower than the same period last year, better than any other week since March and on par with 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 (-55% y/y) improved compared to any of the past three weeks**
- **While regional differences remained strong, most states saw a marked improvement from last week**
 - Domestic bookings to Montana (-11%), Wyoming (-12%) and South Dakota (-16%) experienced the lowest y/y declines and improved compared to the previous week (MT: -27%; WY: -27%; SD: -35%)
 - Domestic bookings to New York (-77%) and Massachusetts (-71%) experienced the highest y/y declines but performed better than the previous week (NY: -81%; MA: -74%)
- International bookings for future travel to the U.S. (-61% y/y) fared significantly better than any other time since the start of the pandemic

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 19, 2020

- Pessimism about the course of the virus increased again as the number of cases soared across most of the country but these darkening feelings did not meaningfully impact safety perceptions about travel or short-term openness and excitement to travel
 - Nevertheless, they did adversely affect both travel readiness and trip plans

- Those in a “ready to travel” state of mind decreased to a three-week low of 56%—and the percent of Americans with trips at least tentatively planned dropped back to 75% after reaching 80% for the last few weeks
- **The pandemic is expected to have a significant effect on upcoming winter holiday travel**
 - **Based on reported 2019 holiday season-related travel and what American travelers anticipate for the 2020 holiday season, nearly 25% fewer Americans will be traveling to celebrate the holidays this year**
 - **The majority of those not traveling have a pandemic-related reason for not doing so**
 - **Among those expecting to travel for the holidays, 28% plan to decrease their spending on these holiday trips relative to last year**
 - **Over one-third (35%) plan to test themselves for COVID-19 prior to their trips**
- Among ski/snowboard travelers who have a destination they regularly visit for overnight ski/snowboard trips, 68% say they are likely to return to this destination for an overnight trip this season
- In terms of convention/group meeting travel, **71% still say they are unlikely to attend conventions until COVID-19 is more under control**, but this metric is at one of the lowest points it has been during the pandemic
 - 16% of American travelers overall—and nearly 40% of convention travelers—say they have plans to attend one or more of these events in the next year, up from 11% in May
 - The percent of convention travelers who report they would be happy if asked to attend such a meeting in the next six months has grown to 50% from 41% in June
 - Trust in conference organizers to institute protocols that look out for attendees’ health as well as in fellow attendees to behave appropriately has grown significantly
 - Trust in fellow attendees reached 71% in the latest survey wave – up from 54% in July and 72% at least somewhat trust conference organizers – up from 65% in July
- It is important for the travel industry to be realistic about the threat that virtual meetings pose to the volume and economic impact of this type of travel in the future
 - While 60% of American travelers say they prefer in-person to virtual conventions/conferences, one-in-five feel neutral and a similar proportion say they prefer virtual

- Among those who attended a virtual convention recently, 71% were satisfied virtually participating compared to in-person

Source: [Destination Analysts](#)

The Harris Poll CV-19 Tracker

October 18, 2020

- COVID-19 lockdowns have given consumers a renewed appreciation for the outdoors
 - 69% of Americans say they have an increased appreciation of the experience and awareness of their surroundings when they are outside
 - Even with winter approaching, Americans are turning to the outdoors for safety, sanity and entertainment
 - Three in 10 (29%) say they will continue to adjust to outdoor socialization during the winter months
- **With high interest in nearly all outdoor activities, consumers are more receptive to outdoor advertising**
 - **Just under half (45%) say they are noticing outdoor advertising (billboards, outdoor video screens, posters, and signage) more than before the pandemic and 38% say they find these ads useful because they provide them with information on COVID safety and hygiene**
 - **At the same time, *indoor* advertising is less noticed and two-thirds (68%) of Americans say they have been spending so much time looking at screens that they tune out digital online ads**

Source: [Harris Poll](#)

iMeet Survey of Meeting Planners

October 18, 2020

- **The percentage of planners who believe they will resume face-to-face meetings by the end of the year rose slightly to 17% this week—up from 16%**
- Just under half of planners (49%) have one or more request for proposals for the future in progress and 73% of planners have at least one future face-to-face meeting contracted

- Looking into 2021, fewer than four in 10 (38%) planners are now targeting the first half of 2021 to resume face-to-face meetings (down from 40% last week), with the majority (24%) 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.

[VIEW LATEST RESULTS >](#)

SOURCE: MMGY Travel Intelligence

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [What Can Other Countries Learn from China's Travel Recovery Path?](#) | McKinsey and Company
- [State of the U.S. Consumer: October 2020](#) | Deloitte
- [The Future of Hospitality \(Canada\)](#) | Deloitte
- [Ahead of the Curve Recovery Series: Chicago](#) | Kalibri Labs

UPCOMING INDUSTRY WEBINARS

- Ongoing | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- October 26 at 3:00 p.m. ET | [Healthy, Happy Holidays - Fall Travel and Gathering Guidance](#) | CDC COVID-19 Partner Update
- 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](#).