



This week

With the election just days away, all evidence suggests that the ongoing negotiations between Congress and the administration on a coronavirus recovery package that can move forward before the election, will not materialize.

Advancing legislation that guarantees more relief, real protection and a comprehensive approach to stimulate domestic and international travel is critical in the immediate term. Focusing on leisure and business travel, as well as focusing on the meetings and events sector and beyond is critical to overall recovery.

We will continue our aggressive advocacy approach along with the COVID RELIEF NOW Coalition the day after the election and through the lame duck where we see an opportunity to secure more relief – and at a minimum an important bridge package to help get us into the new year and a new Congress. We continue to engage so that we are ready regardless of the outcome of the general election.

Thanks to all of you who have been active over the last several months—and we must keep working together. After the election next week, we will need you to help us to continue the important work to advance our industry priorities.

NEW STUDY: Airplane COVID-19 Risk Very Low with Precautionary Safety Measures

October 27, 2020

A new study [released](#) by researchers with the [Aviation Public Health Initiative](#), a project of the Harvard T.H. Chan School of Public Health finds that **through a layered approach to risk mitigation, the scientific evidence shows a low risk of SARS-CoV-2 transmission on aircraft.**

The study is from [phase one](#) of their “Gate-to-Gate” report, looking at strategies and practices to reduce health risks while flying during the pandemic. Key Findings:

- There is a **very low risk of virus transmission on airplanes** because airlines have put in place multiple layers of mitigation including hospital-grade air filtration and ventilation, mask requirements, significant disinfection, boarding and deplaning practices, and health forms that travelers complete prior to flights
- Airplane ventilation is so effective that it reduces the possibility of exposure to COVID-19 to a point that it **“effectively counters the proximity travelers are subject to during flights”**
- Because of the frequent exchange of air on planes coupled with the use of HEPA filters, **over 99% of the particles containing the virus are removed from cabin air**
- A layered non-pharmaceutical intervention approach, with ventilation gate-to-gate, **reduces the risk of SARS-CoV-2 transmission onboard aircraft below that of other routine activities during the pandemic, such as grocery shopping or eating out**

Source: [Harvard T. H. Chan School of Public Health](#)

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



The [Let's Go There Coalition](#) will release a new toolkit tomorrow under the theme Let's Go There, Together—focused on family travel and giving the gift of travel. Be sure to check your inbox and visit the [Let's Go There toolkit](#) webpage tomorrow to find new resources, including an editorial calendar, graphics and sample social media copy, as well as ways to get involved. This new iteration of the campaign will launch on November 16.

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 contracted once again last week, both in absolute terms—falling 2% from the prior week—and on a year-over-year basis**
 - In the week ending October 24, travel spending tallied just \$12.5 billion and reflected a 44% drop below last year's levels (a \$9.7 billion loss)—down from the 43% and 41% drops in the previous two weeks, respectively
 - Midwestern states with climbing COVID-19 cases continued to see inflated losses, with South Dakota, Michigan and Minnesota experiencing some of the most severe downturns
 - Hawaii, D.C., New York, Massachusetts and Illinois were the only states to record losses exceeding 50%
 - Last week marked the first full week since Hawaii ended its mandatory two-week quarantine for visitors. Air visitors to the islands measured only 18% of 2019 levels, but this is nearly triple

the 6% recorded two weeks prior. With this surge in air visitors, Hawaii is no longer the worst performing market

- Since the beginning of March, the COVID-19 pandemic has resulted in \$434 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$55.8 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

Yesterday, the CEOs of the World Travel & Tourism Council (WTTC) and U.S. Travel Association, alongside other industry leaders, addressed the necessary steps to kickstart air travel both nationally and globally, including the important role COVID-19 testing may play in the recovery of the aviation industry. The panel also discussed what procedures airports and airlines are implementing to prepare to open international routes while ensuring a safe and healthy travel experience across all touchpoints. [Access the webinar slides here.](#)

VIEW RECORDING

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

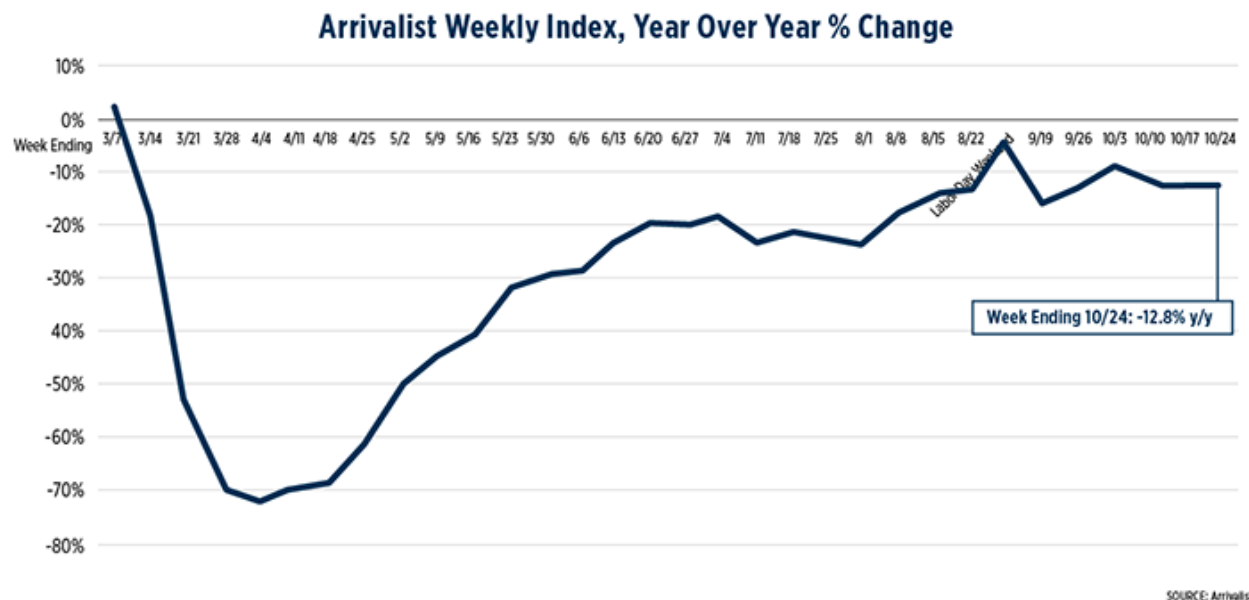
TRACKING TRAVELER TRENDS

The latest travel indicators are fairly flat with no noticeable year-over-year (y/y) improvement in road travel and advanced bookings, and very minimal improvement in TSA screenings compared to the prior week.

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 remained roughly the same as in the previous couple of weeks**
 - Road travel was down 13% y/y last week
 - The latest y/y declines are in line with recent weeks but reflect significant improvements from lows of -70% y/y in early April



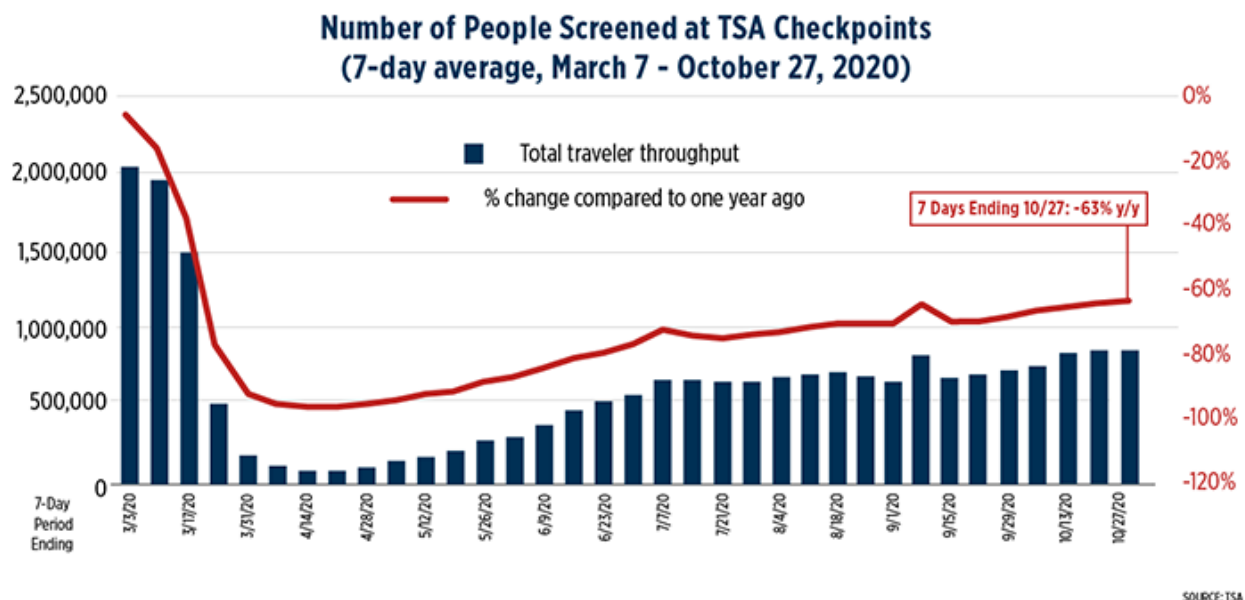
DAILY TRAVEL INDEX

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 slowed down last week, as can be typically expected the end of October, between the start of the school year and pre-holiday season, but improved slightly compared to the same period last year**
 - The latest seven-day average of daily screenings (through Tuesday October 27) was 3% lower than the previous week and 63% lower than the same period last year
 - While still deep in negative territory, air travel has continued to slowly but steadily improve nearly each week; the latest 63% seven-day y/y decline reflects the best y/y performance since air travel plummeted at the start of the pandemic



Source: [TSA](#)

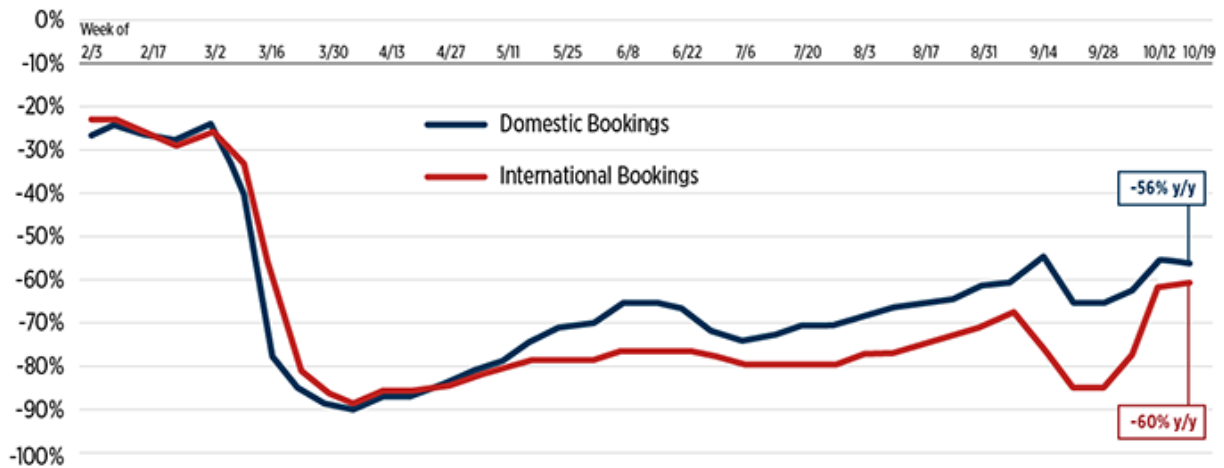
Hotel and Air: Traveler Trends Tracker

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.

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 (-56% y/y) were roughly the same as last week, though improved from earlier weeks**
- Regional differences remained strong:
 - Domestic bookings to Montana (-13%), Wyoming (-17%) and Idaho (-23%) experienced the lowest y/y declines
 - Domestic bookings to New York (-78%), Massachusetts (-72%) and Connecticut (-71%) again experienced the highest y/y declines
- International bookings for future travel to the U.S. (-60% y/y) remained roughly the same as last week and again 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



SOURCE: ADARA

TRAVELER TRENDS TRACKER

Source: [ADARA](#)

TRAVELER AND CONSUMER

SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

October 26, 2020

- As new cases continue to increase at alarming rates, Americans' concerns about the virus and the general economy increased this week. Pessimism about the virus' course in the U.S. is firmly back in a heightened period, returning to levels last seen in July, during the virus' summer surge
 - **More than two-thirds (67%) do not believe that the coronavirus will be resolved by the end of the year and more than half (55%) expect the severity of the coronavirus situation to get worse in the next month**
- The increase in cases has again adversely impacted feelings about travel in the near-term
 - The increased anxiety about the virus coincides with decreasing excitement levels about taking a getaway in the next month and openness to travel inspiration
 - The percent of Americans who agree they have lost their taste for travel for the time being (47%) somewhat increased after holding stable for the last two months
- **However, there are signs that travel may not be as significantly impacted as it was in previous surges during the pandemic**
 - **While half feel unchanged, 35% of American travelers feel they have gained confidence in how to navigate the pandemic in the last three months**
 - Americans are exhibiting less agreement that they will avoid travel until the coronavirus situation is more resolved
 - In line with Americans' increase in confidence in how to navigate the pandemic, Americans' state of mind about travel readiness remained constant from last week with more than half in a ready to travel state of mind (55%)
- **Americans also want something to look forward to and the joy travel brings remains ingrained**
 - **Nearly 60% of Americans agree that having a vacation scheduled in the next six months would make them feel there is something happy to look forward to**

- While just 20% of travelers have taken a flight since March, over 35% plan to travel by air in the next six months. Comfort level with COVID-19 testing prior to boarding increased to 51% from 43% just two weeks ago
 - Social distancing continues to be important to a significant share of Americans when it comes to air travel

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

October 27, 2020

- With a sharp rise in new cases reported across the country, 53% of American travelers say that fear of spreading/contracting COVID-19 is preventing them from taking a trip
- **Beyond health and safety factors preventing American travelers from taking a trip are destination-oriented concerns:**
 - **35% cite travel restrictions as a factor preventing them from taking a trip**
 - 21% state that they are not sure if they are welcome in the destinations they are interested in visiting
- The percent of American travelers who feel safe traveling outside their community is starting to trend downward (currently at 46%, down from 50% just one month ago) as reports of new cases rise
 - 36% of American travelers say they do not intend to travel until there is a COVID-19 vaccine
 - Only 13% of those surveyed have no hesitation about traveling at the moment

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

Back-to-Normal Barometer

October 21, 2020

- As the weather cools and cases increase, the threat of COVID-19 locally is increasing for all respondents—yet remains below highs seen over the summer
- Respondents' willingness to engage in a variety of activities continues to increase as 'COVID-19 fatigue' sets in

- The upcoming holidays have created a dilemma for many Americans, though more than half (52%) of respondents report that they are willing to sacrifice adhering to COVID-19 health protocols to see family this Thanksgiving
- Comfort level staying in a hotel is improving with the percent of respondents requiring a vaccine or medical breakthrough to stay at a hotel hitting a new low
- **More than half of respondents (55%) have six or more unused vacation days in 2020**
 - **Yet, one-third can carry over five or fewer days and another one-third can carry over 10 or fewer days into 2021**

Source: [Engagious](#)

Dreams of Travel This Holiday Season

October 28, 2020

- At least three in five consumers, surveyed across seven countries, plan to stay home for the holiday season this year
- **In lieu of traveling for the holidays, consumers are dreaming of future travel with many saving up to buy 2021 trips**
 - **Over half of global respondents agree they are very interested in receiving a domestic (58%) or international (54%) trip in 2021**
 - **Six in 10 agree their 2021 resolution is to take more vacation time than they did in 2020 and two-thirds indicated that because of the pandemic, they are saving more money for their next trip**
- Relaxation is a top priority. Sixty-four percent agree that, compared to before the pandemic, they are now more likely to book a vacation where they can relax and lounge vs. be physically active (53%)

Source: [American Express](#)

iMeet Survey of Meeting Planners

October 26, 2020

- **The percentage of planners who believe they will resume face-to-face meetings by the end of the year remained at 17% this week**

- Just under half of planners (49%) have one or more request for proposals for the future in progress and 74% of planners have at least one future face-to-face meeting contracted
- Looking into 2021, fewer than four in 10 (39%) planners are targeting the first half of 2021 to resume face-to-face meetings, with the majority (26%) targeting Q2

Source: [iMeet](#)

Travel Buyers Cite Government Restrictions As Biggest Travel Barrier

October 22, 2020

- **Three-quarters of respondents believe that rapid testing prior to air departure, and waiving quarantining requirements for those who test negative, is the most effective way to open up international travel**
- **More than four in 10 global travel professionals (43%) cite government travel restrictions and policies, such as quarantine and entry restrictions, as the greatest barrier to travel, followed by company policies (32%)**
- Face-to-face meetings are 'more' or 'much more' effective than virtual meetings according to 82% of respondents
- The current short-term forecast for travel remains unchanged with 90% of Global Business Travel Association member companies still not open to international travel and 68% restricting domestic travel

Source: [Global Business Travel Association](#)

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 >](#)

INTERNATIONAL TRAVEL TRENDS

The [National Travel and Tourism Office](#) recently released September visitation data for overseas markets.

- Overseas visitations in September 2020 remained 95% below September 2019 levels (just slightly improved from -96% y/y in August)
 - **While visitation levels have been improving each month from nearly -100% in April, the pace of improvement has been minimal**
 - Visitations from Canada were down 97% y/y in August (latest available) while visitations from Mexico were down 68%

Source: [National Travel and Tourism Office](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Global Holiday Season Shopping Plans, Finding Fitness and Dreams of Travel](#) | American Express TrendEx
- [When Will Convention and Group Demand Come Back?](#) | CBRE
- [Business Events Recovery Will be 'a Marathon, Not a Sprint'](#) | PCMA Convene October COVID-19 Recovery Dashboard
- [COVID-19 Tourism Spend Recovery](#) | McKinsey and Company
- [The Future of Sports Venues is Contactless](#) | Deloitte
- [The Consumer is Still Spending – But Where?](#) | ITR Economics

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **November 3 at 3:00 p.m. ET** | [Funding Futures: Dedicated Funding and Tax Increment Financing](#) | Miles Partnership, Civitas Advisors and Tourism Economics
- **November 4 at 11:30 a.m. ET** | [2020 U.S. Election Debrief](#) | Tourism Economics

- **November 10 at 2:00 p.m. ET** | [Planning for the New Normal: Business Travel in 2021](#) | BTN Group Content Solutions
- **November 12 at 3:00 p.m. ET** | [Welcoming Customers This Holiday Season and Beyond](#) | American Express
- **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](#).