

COVID-19

WEEKLY TRAVEL DATA REPORT

This week

Leadership in Washington has still been unable to reach an agreement on a COVID recovery package, putting hundreds of thousands of businesses at risk of closing their doors for good and millions of American jobs in jeopardy.

The travel industry is badly hurting and needs real relief. There is no question that every sector, from airports to meetings and events and countless others in the industry, needs federal support, but there is one immediate step Congress can take—at minimum—to help businesses who badly need it: extend and expand the Paycheck Protection Program (PPP). There is more than \$130 billion currently available in the PPP and it is irresponsible to not put it to use to help small businesses now.

The COVID RELIEF NOW Coalition has released [an ad](#) in addition to the [toolkit of resources](#) for you to help us urge Congress and the administration to advance relief legislation immediately and will be providing additional ways to make our voice heard next week. If you have any questions on how you can get involved with the COVID RELIEF NOW Coalition, please contact [Tori Emerson Barnes](#), executive vice president of public affairs and policy.

ACTION ALERT

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



The Let's Go There Coalition is busy preparing for the next round of messaging and toolkit materials, slated for release mid-November, with holiday-inspired copy and imagery focused on capturing the joy evoked by planning, booking and ultimately traveling.

[Resources](#) for use by the industry remain available.

TOOLKIT

TRAVEL INDUSTRY EMPLOYMENT: UPDATED OUTLOOK

October 6, 2020

- [New data](#) from Tourism Economics shows that, without immediate aid, 50% of all travel-supported jobs will be lost by December—an additional loss of 1.3 million jobs
- The leisure and hospitality industry accounted for 11% of pre-pandemic employment in the United States, yet has suffered 36% of all job losses—up from 33% in July
- Nearly half of the 16.9 million jobs in the leisure and hospitality industry were lost in March and April. Since then, while about half have been restored, due to the lack of relief from Congress, and the continuation of the pandemic, almost 4 million jobs are gone and a million more jobs are at risk. This equates to roughly one-quarter (23%) fewer leisure and hospitality jobs—nearly double the next most hard-hit industry

- With over 23% of leisure and hospitality jobs lost since the onset of the pandemic, coupled with numerous airlines, theme parks, cruise lines and other tourism-related businesses forced to undergo additional layoffs in October, the employment situation remains tenuous and likely will not fully recover until well into 2023

Source: [Tourism Economics](#)

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.

- **After several weeks of tepid progress, travel spending grew by 5% last week, resulting in the greatest non-holiday-assisted increase since June**
 - In the week ending October 3, travel spending tallied \$12.9 billion, a significant increase over the past few weeks
 - Travel spending measured 42% below last year's levels (a \$9.3 billion loss), an improvement from the 44% drop in the prior week
 - September's final tally of \$39.2 billion in travel spending losses is an 11% improvement compared to the \$44.0 billion in travel spending losses seen in August and the best month since the onset of the pandemic
 - Only Hawaii, Washington, D.C., New York, Massachusetts and Illinois are experiencing losses exceeding 50%. The rest of the 10 most impacted states are all located in the northeast
 - While beach destination states such as Delaware and Florida experienced contractions in recent weeks, the flows might be heading towards mountain resort towns, as a flurry of home buying in these areas presents early signals of a strong winter outdoor sport season
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$402 billion in cumulative losses for the U.S. travel economy
 - The continual depressed level of travel spending has caused a loss of \$52.1 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

The Technologies Revolutionizing the Future of Travel

Thursday, Oct 15, 2020 | 12:00 p.m. ET

Join us next week on Thursday, October 15, at 12:00 p.m. ET for the next Assessing Recovery webinar, which will focus on how the growing use of biometrics and various touchless solutions throughout the traveler's journey is helping to drive the future of a safe, secure and efficient trip from beginning to end. Learn how airlines, airports, hotels and other segments are leveraging these technologies to promote an enhanced travel experience.

Featured speakers:

- **Chris McLaughlin**, chief operating officer & executive vice president, Denver International Airport
- **John Sanders**, president of emerging markets, Daon

REGISTER NOW

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

TRACKING TRAVELER TRENDS

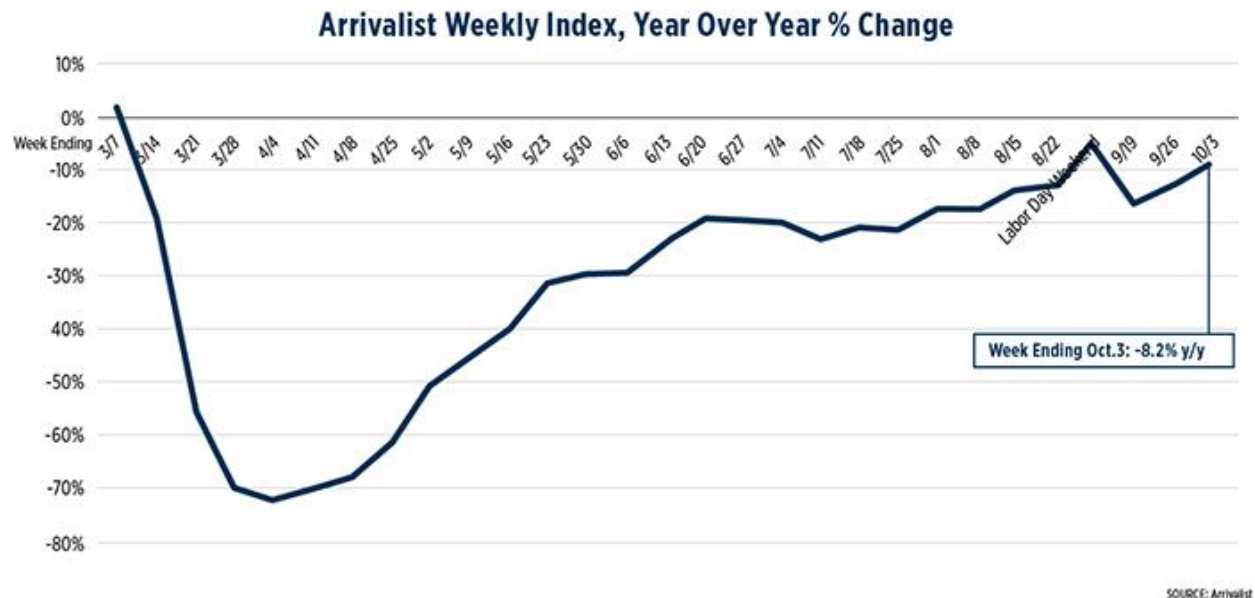
Air travel continued to grow slowly but steadily, with year-over-year (y/y) rates (-67%) inching slightly better, though still deep in negative territory. Road travel improved significantly from the previous two weeks and is nearing pre-pandemic levels comparable to October 2019. Domestic as well as international bookings for

future air and hotel travel remained stable at subdued levels of -65% and -84%, respectively, though many areas that performed well over the summer are now experiencing more significant declines on a y/y basis.

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 significantly improved (on a y/y basis) compared to the past two weeks and is nearing 2019 levels**
 - Road travel was “only” 8.2% down y/y last week, which is, by far, its best performance in any week since the start of the pandemic other than Labor Day weekend
 - The latest y/y declines reflect a significant improvement from lows of -70% y/y in early April



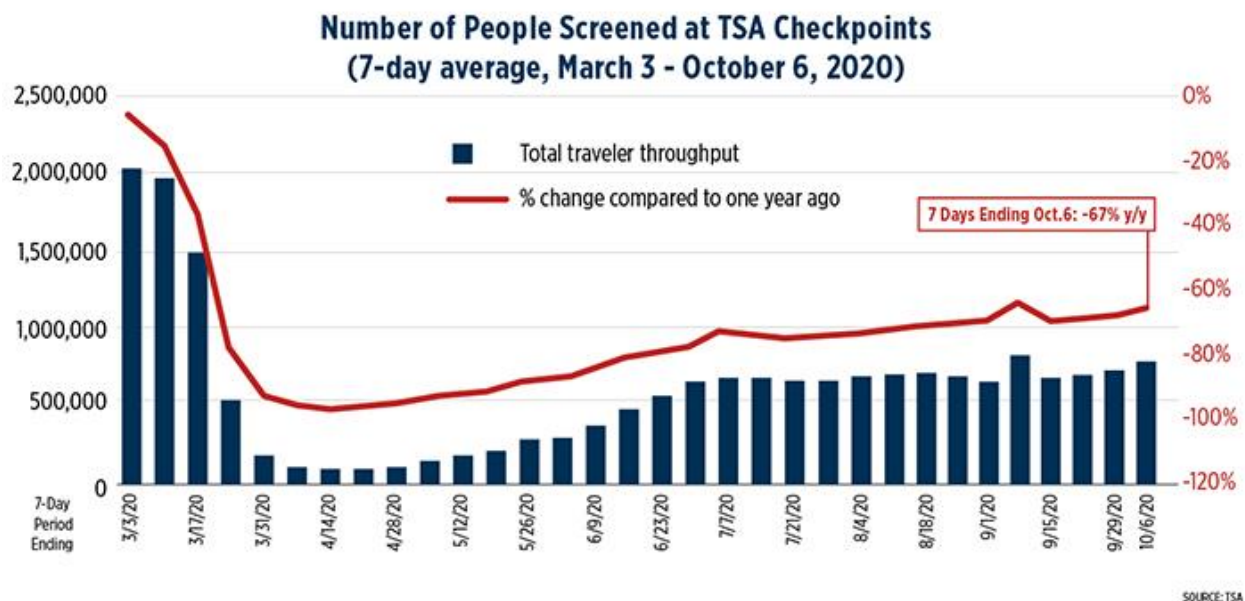
DAILY TRAVEL TREND
INDEX

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 daily screenings (through Tuesday, October 6) increased by more than 3% for the third straight week
 - At 762,000, it was 3.4% higher than the previous week and the highest since the start of the pandemic (except Labor Day)
 - Screenings over the last seven days were 67% lower than in the same period last year, better than any other week since March (except Labor Day)



Source: [TSA](#)

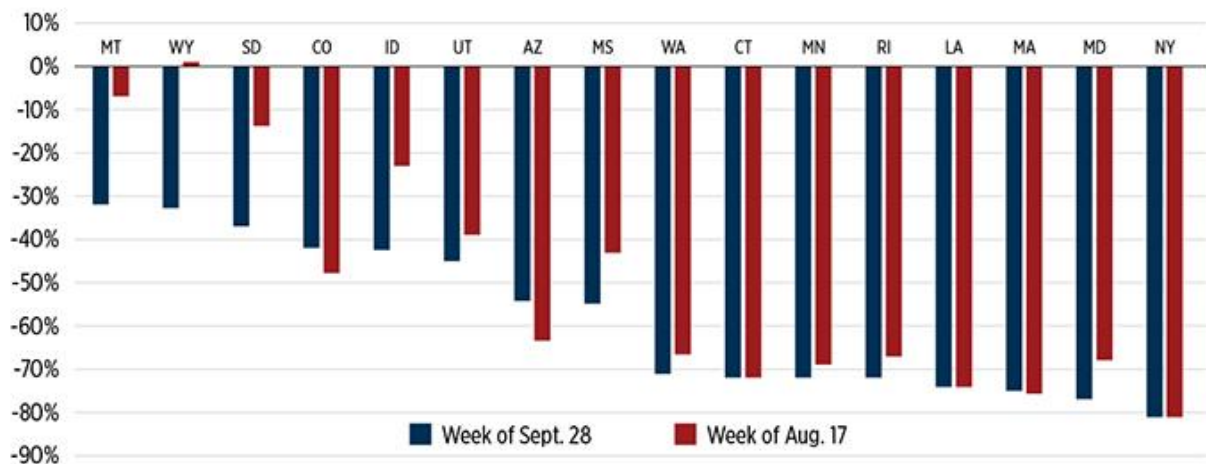
Hotel and Air: Traveler Trends Tracker

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 remained at the same subdued level of -65% y/y
- **While regional differences remain large, the gap has narrowed further due to weaker performance in states that have experienced the lowest y/y declines**
 - Domestic bookings to Montana (-32%), Wyoming (-33%) and South Dakota (-37%) experienced the lowest y/y declines but continued to perform significantly worse than in recent weeks
 - By comparison: the y/y change in bookings in the week of August 17 to these states were: Montana (-7%), Wyoming (+1%) and South Dakota (-14%)
 - Domestic bookings to New York (-81%), Maryland (-77%), Massachusetts (-75%) and Louisiana (-74%) experienced the highest declines, roughly the same as they did last week and in earlier weeks
- International bookings for future travel to the U.S. continued to fare significantly worse than domestic bookings and remained at -84% y/y

**Domestic Bookings to Strongest and Weakest Performing States
(weeks of September 28 and August 17, year over year % change)**



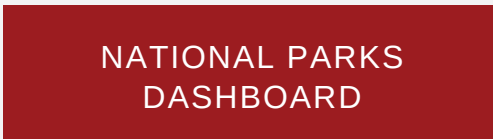
SOURCE: ADARA

TRAVELER TRENDS
TRACKER

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

This [exclusive dashboard](#) 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.



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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Traveler Intentions Pulse Survey (TIPS)

October 5, 2020

- While half of respondents are still “somewhat” concerned about contracting the virus, the percentage who are “extremely” concerned dropped from 31% to 26%
- **The likelihood of taking a domestic leisure trip in the next six months continues to rise (with 46% saying they are likely to do so, up from 42% last month), while the likelihood of taking a domestic business trip has remained roughly the same as the prior month**
 - The likelihood of flying both domestically (up from 35% last month to 38%) and internationally (up from 17% to 22%) during the next six months increased
 - The likelihood of attending an off-site meeting (up from 21% last month to 26%) or a conference/convention (up from 18% to 21%) during the next six months continues to rise
 - The likelihood of visiting a theme park continues to rise (up from 19% to 22%)

- Although the availability of a vaccine is the most influential factor affecting future travel decisions, the majority of respondents would either wait (49%) or decline (11%) to receive a vaccine when one becomes available

Source: [MMGY Travel Intelligence](#)

Coronavirus Travel Sentiment Index Report

October 4, 2020

- Although expectations for the pandemic's course in the next month darkened—now 48% feel it will get worse, up from 43% last week—this did not seem to impair Americans' travel plans
 - After dropping for the last two weeks, the proportion in a “ready to travel” state of mind returned to 57%
 - Over 40% of American travelers anticipate that their next trip will take place before the end of the year
- While outdoor-brand destinations like Colorado, Utah and North Carolina continue to displace some iconic cities for top spots over the next 12 months, urban destinations now appear poised for a comeback
 - Well over one-third of respondents described the destination they most want to visit in the next year as a city/metropolitan area
 - When asked about the key factors they would consider before visiting a destination, traditional attributes like affordability and popularity were joined by low rates of COVID-19, mask-wearing and social distancing
- **Despite increased interest in travel, 53% continue to agree they will engage in some travel avoidance**
 - **These travel avoiders are dissatisfied with the information available to travelers to help them decide when it is safe to travel, rating their satisfaction level a 5.8/10 on average**
 - While the wide distribution of an effective COVID-19 vaccine is, by far, the top condition for being comfortable traveling again, willingness to take a vaccine has declined somewhat
- With regards to the recovery in business travel, 27% of those who work for companies in which employees travel for business say that this travel has resumed, up from 24% one month ago
 - However, among those whose companies are not yet back to business travel, just 6% report that their employer has announced a timeline for return

- While about a quarter anticipate that their company's business travel will return by January, more than half do not expect it until after April

Source: [Destination Analysts](#)

iMeet Survey of Meeting Planners

October 4, 2020

- **As the end of the year approaches, the percent of planners who believe they will resume face-to-face meetings by the end of the year declined to 10%**
- Business is starting to be booked – nearly half (47%) of planners 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
- Less than half of planners anticipate they will resume face-to-face meetings in the first half of 2021, with 12% resuming in Q1 and 33% resuming in Q2

Source: [iMeet](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Market Kalibration: August 2020 U.S. Industry Performance](#) | Kalibri Labs
- [Boeing Forecasts Challenging Near-Term Aerospace Market with Resilience in Long Term](#) (login required) | Boeing
- [Global Traveler Sentiment Study](#) | OAG
- [Holiday Travel Confidence Report](#) | Hopper
- [Global Airport Traffic Tracker](#) | Fitch Ratings
- [When Will Consumers Feel Safe](#) | Morning Consult
- [Research Points to Low Risk for COVID-19 Transmission Inflight](#) | IATA

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **October 13 at 3:00 p.m. ET** | [Clarity in a Time of Crisis: Fall Travel Outlook and Insights from Europe](#) | Longwoods International and Miles Partnership
- **October 21 at 1:00 p.m. ET** | [2021 Hotel RFP's: Options to Explore](#) | Business Travel News
- **November 3 at 3:00 p.m. ET** | [Funding Futures: Dedicated Funding and Tax Increment Financing](#) | Miles Partnership and Civitas Advisors
- **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](#).