



COVID-19 WEEKLY TRAVEL DATA REPORT

This week

The U.S. House was back in session this week for the first time since the election. Both parties held leadership elections for the 117th Congress resulting in no material changes.

Activating for COVID-19 Relief Package: With Congress in Washington this week, U.S. Travel and the more than 300 members of the [COVID RELIEF NOW Coalition](#) have continued to engage Congress — pushing to advance relief during their “lame duck” session before the end of the year.

We will be initiating an ACTIVATION BLITZ beginning November 30th so please keep a look out for ways to engage. It is more important than ever. Additionally, please consider Tweeting your members of Congress NOW urging them to pass a COVID-19 recovery package that includes measures to help travel businesses. We have an updated social media guide to make it easy.

[ACCESS SOCIAL GUIDE](#)

A relief package cannot wait until January. Please help and engage today. Thank you in advance for your support.

Additional Legislative Advancements: Both the [U.S. Senate](#) and [U.S. House of Representatives](#) advanced legislation supported by U.S. Travel that would study the effects of the COVID-19 pandemic on the travel and tourism industry, including domestic, international, leisure, business, convention, meeting and event segments. We are grateful to Senators Roy Blunt (R-MO) and Amy Klobuchar (D-MN), as well as Representatives Kathy Castor (D-FL) and Fred Upton (R-MI) for championing this important bill that will shed attention on the economic suffering and need for near-term relief for our industry and workforce.

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



Let's Go There, Together launched earlier this week, with travel brands and destinations across the industry featuring family-focused imagery and the campaign logo on their [websites](#) as part of the [homepage takeover](#). This exciting Phase 2 of Let's Go There is off to a great start.

For those offering special travel deals over the holidays, use the hashtag **#LetsBookTravel** to help ensure travelers and consumers can find your deals easily on social media.

An [editorial calendar](#) is also available to help you plan your involvement through the remainder of the year. We encourage everyone to get involved.

ACCESS THE TOOLKIT

HEALTH AND SAFETY GUIDANCE

U.S. Travel held a press conference earlier today attended by more than 50 members of the media to highlight the updated ["Travel in the New Normal" health and safety guidance](#) released today in anticipation of the expected uptick in travel for the holidays.

The guidance focuses on the importance of a layered approach to health and safety, and emphasizes the shared responsibility of the public in ensuring a healthy and safe travel experience by practicing preventive measures, including wearing masks, physical distancing and washing hands regularly.

To help communicate the shared responsibility we all have, U.S. Travel has also released an updated social media guide as part of our #TravelConfidently campaign for use by the industry leading up to the Thanksgiving holiday. All other materials from the campaign can be found in the [#TravelConfidently toolkit](#).

ACCESS THE GUIDE

FALL 2020 TRAVEL FORECAST

U.S. Travel has just [released](#) the Fall 2020 Travel Forecast, which provides updated estimates for how domestic leisure and business travel, as well as international inbound travel, will perform this year and beyond.

The results of this report are dire, particularly for business travel, though projections for domestic leisure have marginally improved since spring.

- Total travel spending is expected to decline by 45% and not return to 2019 levels until 2024 or 2025
- Total losses will reach \$510 billion by the end of the year and \$1 trillion by the end of 2023
- Domestic leisure travel is expected to decline by 24%, domestic business by 60% and international inbound travel by a staggering 76% this year
- We are on pace to lose 4.5 million direct travel jobs—that's 50% of all travel jobs—by the end of 2020

The [forecast table](#) is available publicly. The [full report](#) requires a U.S. Travel member login.

ACCESS THE FORECAST

NEW: GETTING BACK TO BUSINESS REPORT

We have also released a comprehensive [new report](#) focused specifically on the impact the coronavirus pandemic has had on business travel and the meetings and events sector.

ACCESS THE REPORT

The report features case studies that illustrate the range and depth meeting and event cancellations have had on destinations and businesses around the U.S. and analyzes barriers to recovery and the potential timeline for this depression.

The report also highlights how U.S. Travel is advocating to help accelerate recovery, including the need for standardization to allow for widespread rapid and reliable testing, liability protections for businesses and more.

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 rose 4% last week—recovering about one-third of the prior week's 11% decline**
 - In the week ending November 14, travel spending tallied \$11.9 billion, reflecting a 44% drop below last year's levels (a \$9.5 billion loss)

- While this is an improvement from the 46% year-over-year (y/y) decline in the previous week, it remains worse than the 42% y/y decline (and \$12.9 billion in travel spending) two weeks earlier
 - The y/y decline in travel spending has remained in the -41% to -46% range for 14 of the last 15 weeks, the lone exception being the first week of September due to a boost from Labor Day holiday travel
- Likely a result of the rapid rise of COVID-19 cases in the region, the Midwest was the only region not to improve from the prior week
 - Seven of the 17 states that experienced worsening conditions in the week ending November 14 were in the Midwest, with Minnesota, Iowa and Indiana experiencing some of the largest declines of the week
 - On the other hand, the severe declines in West Virginia, South Carolina, Nevada and Puerto Rico in the week ending November 7 proved to be a one-week phenomenon, as these states were among the best performers last week
- Since the beginning of March, the COVID-19 pandemic has resulted in \$463 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$59.5 billion in federal, state, and local tax revenue since March 1

Note: The full report will be available online after the Thanksgiving holiday.

U.S. TRAVEL WEBINARS

Looking Ahead to 2021: U.S. Travel's Latest Forecast

Thursday, December 3 | 12:00 p.m. ET

Join us for the next webinar in our Assessing Recovery webinar series where Adam Sacks, president and CEO of Tourism Economics, will break down the latest Fall 2020 Travel Forecast—shedding light on what to expect in 2021 and beyond, and discussing potential implications for the economy.

REGISTER NOW

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

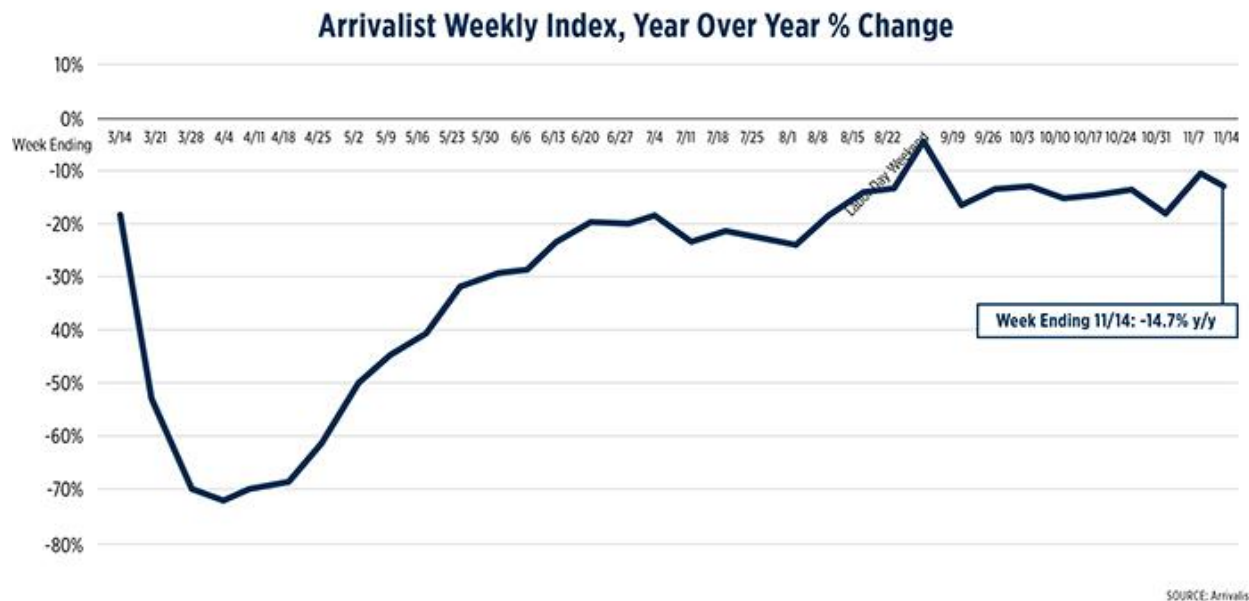
TRACKING TRAVELER TRENDS

The latest travel indicators show a noticeable improvement in air travel—with TSA screenings tied at their best y/y performance since the start of the pandemic. Road travel remained relatively flat in recent weeks, but much improved on a y/y basis since the spring and summer. Domestic bookings for future travel declined slightly compared to last year but international bookings improved.

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 has remained roughly flat over most weeks since Labor Day—in the -10% to -15% y/y range, this past week being no exception**
 - While there have not been any significant weekly improvements since the end of the summer, road travel has generally maintained a relatively good performance over these last few weeks, with lower y/y declines on a consistent basis than any other time since the start of the pandemic



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 increased last week and also improved on a y/y basis**
 - The latest seven-day average of daily screenings (through Tuesday, November 17) was 1.8% higher than the previous seven-day period, and “only” 63% lower than in the same period last year
 - Though it is still deep in negative territory, the latest 63% y/y decline reflects an improvement over the 66% y/y decline in the previous seven-day period; it is also—tied with the seven-day period ending Oct. 27—the best y/y performance since the start of the pandemic



Source: [TSA](#)

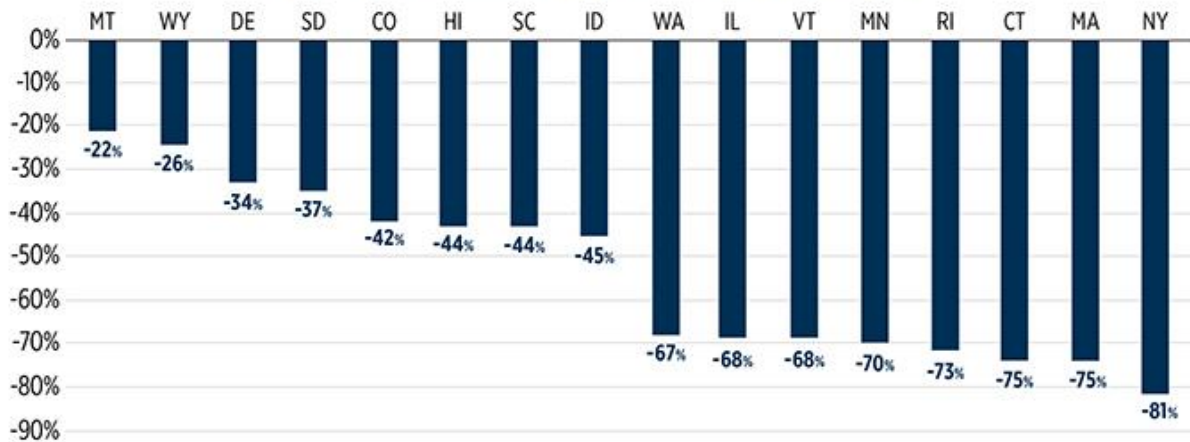
Hotel and Air: Traveler Trends Tracker

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 (-60% y/y) were slightly lower than in the previous week**
- **Regional differences remained strong:**
 - Domestic bookings to Montana (-22%), Wyoming (-26%) and, for the first time, Delaware (-34%) experienced the lowest y/y declines
 - Domestic bookings to New York (-81%), Massachusetts (-75%) and Connecticut (-75%) experienced the highest y/y declines
- **International bookings for future travel to the U.S. (-58% y/y) performed better than domestic bookings for the first time since April and were significantly improved from earlier weeks**

**Domestic Bookings to Strongest and Weakest Performing States
(Week of November 9, year-over-year % change)**



SOURCE: ADARA

TRAVELER TRENDS TRACKER

Source: [ADARA](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

November 16, 2020

- Americans' concerns about contracting COVID-19 rose in recent days as daily COVID-19 cases skyrocketed: 61% now believe the pandemic will be getting worse in the next month; just 14% feel it will get better
- **The trajectory of the pandemic continues to depress how Americans feel about travel for the near-term**

- Those with high excitement levels for taking a potential getaway in the next month (42%) plummeted over seven percentage points since last week, and openness to travel inspiration (42%) also declined to the lowest level it has been since August 9
- The percent that agree they have lost their interest in travel for the time being increased to 46% from 43% in the last week
- About 60% of American travelers say they wouldn't be able to fully enjoy travel, and 47% say they would feel guilty traveling right now
- Trip cancellations and postponements have increased (47%) and 63% are now less likely to travel in the next three months
- **Just three in 10 plan to take a holiday season-related trip this year — down from 55% in 2019**
- **While feelings about travel in the short-term may be depressed, there continue to be positive indicators for travel's future**
 - The perception of travel and leisure activities as unsafe has not notably increased back to peak levels recorded in July and April
 - Americans' travel state-of-mind remained stable with 57% in a ready to travel state of mind
- In addition, **nearly 80% have at least tentative trip plans for some time in the next year, although over a third are eyeing May 2021 or later**
- Over 60% of American travelers said Pfizer's promising vaccine announcement made them more or much more optimistic that they can travel safely in 2021

Source: [Destination Analysts](#)

Visiting Friends and Family Dominate First Half 2020 Trips

November 18, 2020

- Although travel looked different and there was a significant decline in domestic travel and visitor spending in Q2 2020, Americans were still traveling
- Half of domestic trips in Q2 were to visit friends and family, additionally, the share of outdoor trips nearly doubled in Q2 2020, compared to Q2 2019, and now represent over 10% of all overnight trips
- Average trip spending was down almost one-quarter for the first half of 2020 compared to 2019 – particularly in the recreation, food and beverage and lodging categories

- Road trips dominated with three-quarters of travelers preferring to travel by auto and short-term rentals gained share over traditional lodging accommodations
- **Domestic trips also increased in length—averaging around four nights**

Source: [Longwoods International](#)

Business Travelers Itching to Get Back on Road

November 19, 2020

- Half of Global Business Travel Association (GBTA) travel buyer and procurement professionals feel their employees are 'willing' or 'very willing' to travel for business in the current environment
- **Following recent announcements of potential, effective vaccines, six in 10 GBTA travel buyer and procurement professionals believe that their company will be more likely to allow business travel and employees to attend in-person meetings in 2021**
- Regarding government restrictions, 55% of North American GBTA travel buyer and procurement professionals feel there should be an exception to mandated quarantine requirements for international business travelers, who take short-duration business trips that involve meeting with only a few people
- Domestic business travel is anticipated to return to 50% of 2019 levels within the next nine months according to 58% of non-European buyers while expectations for international travel will take longer with 54% expecting it will take 10-24 months to reach 50% of 2019's level

Source: [Global Business Travel Association](#)

iMeet Survey of Meeting Planners

November 15, 2020

- With the recent promising vaccine news, many planners are hopeful as they look to 2021. The percentage of planners with a request for proposal in progress and with at least one future face-to-face meeting booked or contracted both increased this week to 49% and 75%, respectively
- **68% of meeting planners anticipate they will resume face-to-face meetings sometime in 2021, with half not planning on meeting until Q2 (27%) or Q3 (21%)**

- Yet, uncertainty about when to resume face-to-face events continues to increase and reached 21% this week, up from 18% the prior week

Source: [iMeet](#)

The Harris Poll CV-19 Tracker

November 18, 2020

- Working remotely has its benefits. Americans have enjoyed the flexibility of working remotely and also feel their personal health and working relationships have improved
 - Two-thirds (67%) of remote workers say their lifestyle has gotten healthier since working from home and 41% say communication with their manager is more effective since working remotely
- **Yet, there are aspects of going to the office that Americans miss—one-quarter of remote workers miss in-person meetings**

Source: [Harris Poll](#)

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 >](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Seven out of 10 Americans Unlikely to Travel for Holidays](#) | American Hotel and Lodging Association
- [The State of Recovery for Tours, Activities and Attractions](#) | Arival
- [Air Travel Remains Biggest Concern Among Travelers](#) | J.D. Power

- [The Outdoor Recreation Economy: 2019](#) | Bureau of Economic Analysis
- [Consumer Sentiment Towards Attending Live Events](#) | Sodexo
- [Airline Data: What Next Beyond Crisis Response?](#) | McKinsey and Company
- [More than Seven in 10 Hotels Won't Survive Another Six Months Without Relief](#) | American Hotel and Lodging Association

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **November 23 at 12:00 p.m. ET** | [State of the Industry Report](#) | BTN Content Solutions
- **December 1 at 8:00 a.m. ET** | [One Voice: to Recovery and Beyond Virtual Event](#) | World Travel and Tourism Council
- **December 3 at 11:00 a.m. ET** | [Navigating the Road to Recovery in 2021 -Virtual Tourism Conference](#) | ADARA

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](#).