



This week

House Speaker [Nancy Pelosi](#) and Senate Majority Leader [Mitch McConnell](#) spoke earlier today, a positive sign that a deal on a COVID-19 recovery package may come together before the end of the year. Additionally, work continues behind the scenes among the bicameral bipartisan moderates and we hope that we will see more detail on their package as early as Monday. The U.S. Travel team has been highly engaged with Members of Congress and staff this week and there seems to be a lot of energy that an agreement can be reached.

Which is why our collective voice has never been more critical. Thank you so much to those of you who have been engaged – it is working! We urge you to continue and for those that haven't, please join our industrywide [activation blitz](#) which includes many ways to reach your members of Congress with our message: **travel businesses and workers cannot wait until next year for relief.** Ways to get involved include:

- [Send an Action Alert](#)
- [Post on social media, tagging your members of Congress](#)
- [Make a phone call to Congress](#)
- [Coordinate with local media](#)

ACTIVATION RESOURCES

Please make sure to encourage your networks, stakeholders and colleagues to do the same to maximize our impact.

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



Travel brands and businesses continue to engage with the [Let's Go There, Together](#) campaign, emphasizing family travel and giving the gift of future travel. The campaign will continue throughout the rest of the month and an [editorial calendar](#) is available to help you plan your involvement. We encourage everyone to get involved.

ACCESS THE TOOLKIT

We also strongly encourage you to continue to communicate the enhanced health and safety measures travel businesses have implemented, as well as emphasize that a safe and healthy travel experience is a shared responsibility, particularly in the midst of this holiday season. We must all continue to practice preventive measures, including wearing masks, keeping a safe distance and washing hands regularly. Resources are available in our [Travel Confidently toolkit](#).

#TRAVELCONFIDENTLY

NEW RESOURCE:
MEET SAFE PLATFORM

The Meetings Mean Business Coalition's [Meet Safe platform](#), developed in partnership with [Simpleview](#), is designed to showcase that with the proper adherence to [health and safety best practices](#), in-person and hybrid meetings and events can take place now and into the future. Obviously these keep in mind the current state and city [gathering limits](#). Special shout out to event hosts, venue operators, planners, destination marketing professionals and/or suppliers, if you have hosted a successful in-person meeting or event since the start of the pandemic, [please share it here](#).

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.

- **Thanksgiving holiday travel boosted travel spending 9% last week**
 - In the week ending November 28, travel spending tallied \$13 billion—an improvement from the \$11.9 billion in spending in the previous two weeks—and reflected a 39% drop below last year's levels (an \$8.4 billion loss)
 - The 39% year-over-year (y/y) drop was significantly better than the 44% y/y drop in the previous two weeks, and marked the best y/y performance since Labor Day week, and the second-best since the start of the pandemic
 - Despite car trips' continued moderation, air travel achieved its strongest mark since mid-March
 - A reintroduction of inter-state travel restrictions in most of the Northeast led that region to reap the smallest Thanksgiving holiday boost of any region
 - Maine and Vermont, both states with mandatory 14-day quarantines for travelers, felt the greatest contractions in travel spending
 - Vermont joins New York, Washington D.C., Hawaii, Illinois and Massachusetts as states with losses exceeding 50% of 2019 weekly travel spending levels

- On the other hand, the start of the winter ski season saw Utah, Alaska, Colorado, Idaho and Wyoming as five-of-the-six greatest gainers in comparison to the prior week
- Since the beginning of March, the COVID-19 pandemic has resulted in \$481 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has resulted in a loss of \$61.8 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

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

Earlier today, in our latest Assessing Recovery webinar, Adam Sacks, President and CEO of Tourism Economics, discussed the latest Fall 2020 Travel Forecast—shedding light on what to expect in 2021 and discussing potential implications for the economy.

View the recording below for the full webinar.

FULL RECORDING

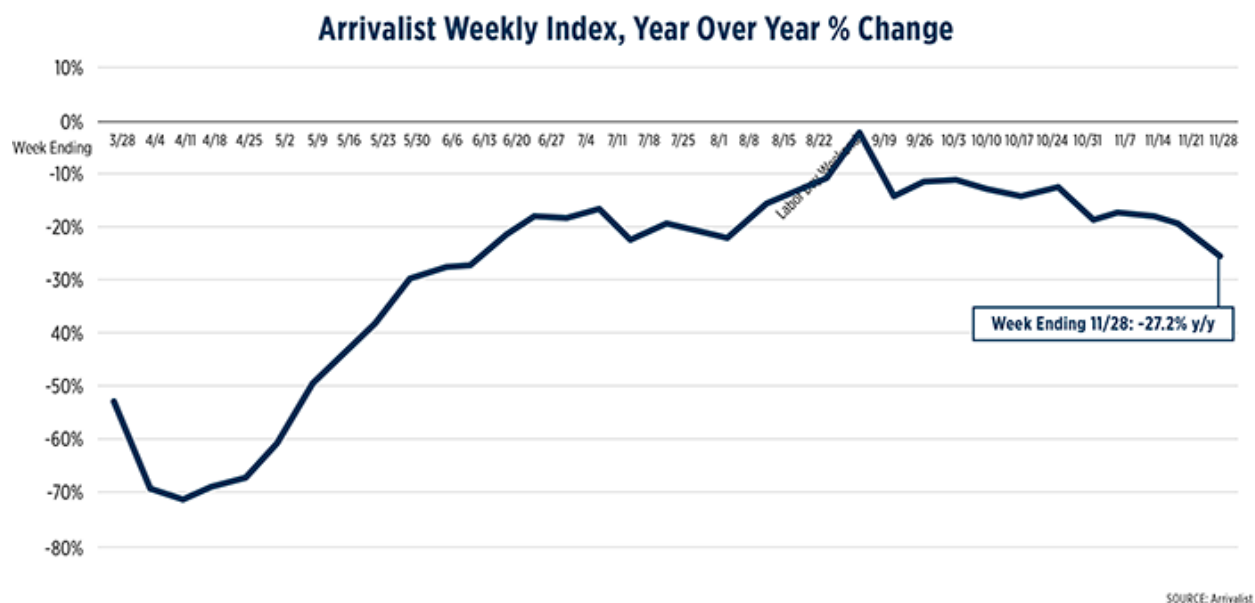
Access all recordings on our [Assessing Recovery series webpage](#).

TRACKING TRAVELER TRENDS

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 over Thanksgiving [was down 35% year-over-year \(y/y\)](#), the worst performance of any holiday since the start of the pandemic
 - In terms of weekly trends, road travel last week (seven-days ending Sunday, November 29) was 27% lower than in the same period last year—its worst y/y performance since early June. Road travel has been consistently trending into deeper negative territory since early October



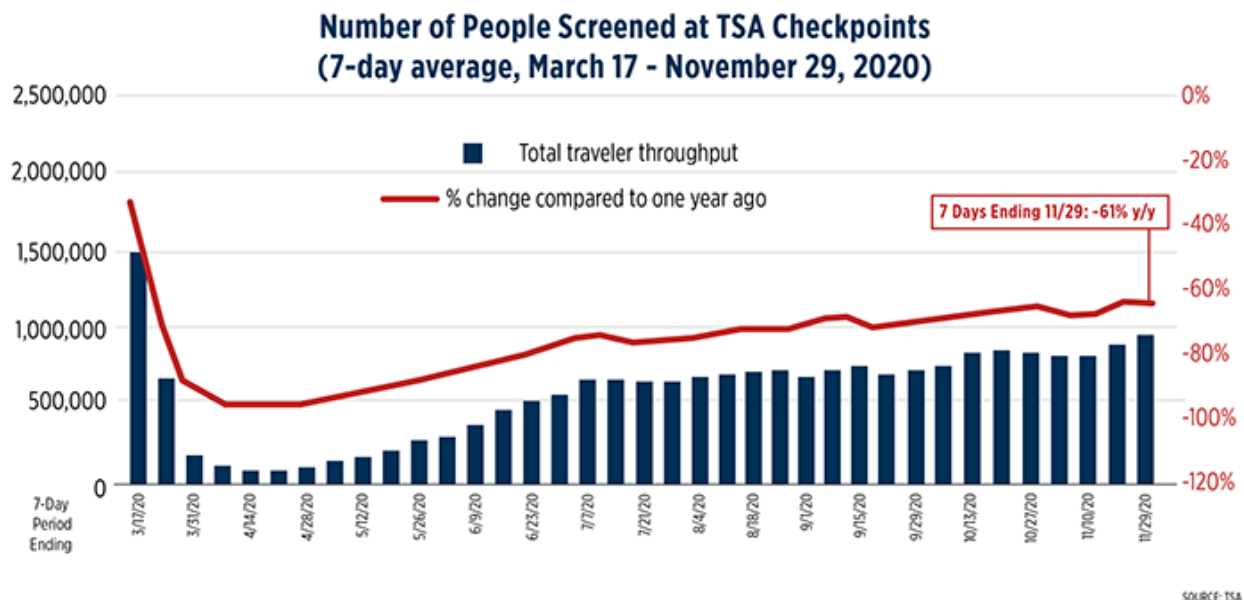
DAILY TRAVEL INDEX

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.

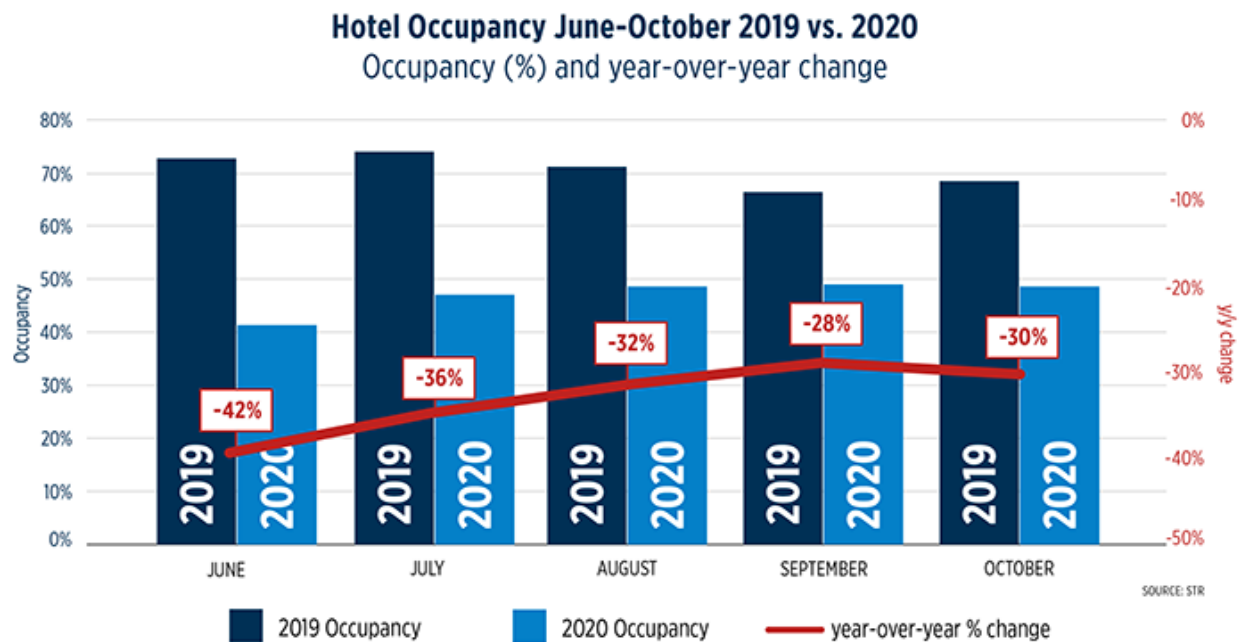
- **Daily TSA screenings reached new highs around the Thanksgiving holiday, and also improved on a y/y basis**
 - TSA screenings reached nearly 1.2 million (-59% y/y) on the Sunday after Thanksgiving, by far the highest level since the start of the pandemic
 - The seven-day average last week (through Sunday, November 29) was 917,000 (-61% y/y), a new seven-day record
 - Though it is still deep in negative territory, the latest 61% y/y decline—tied only with the previous week—reflects the best y/y performance since the start of the pandemic



Source: [TSA](#)

Lodging Update

- **Hotel occupancy was 35% on Thanksgiving Day 2020, which is 38% lower than Thanksgiving Day 2019**
- After improving through the summer (from -42% y/y in June to -28% y/y in September), hotel occupancy took a slightly negative turn and was down 30% y/y in October



Source: [STR 2020 © CoStar Realty Information, Inc.](#)

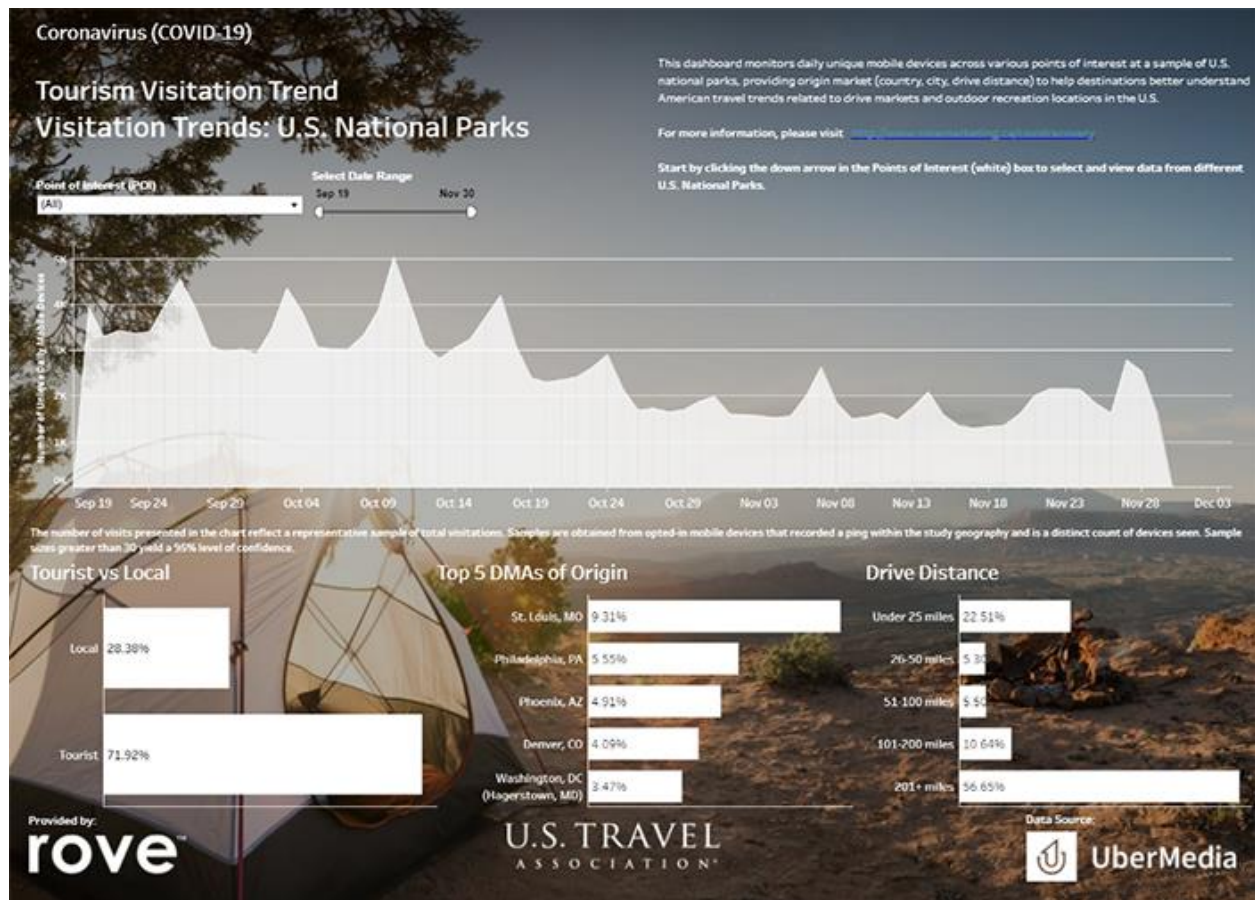
Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, U.S. Travel's [exclusive dashboard](#) monitors daily unique mobile devices across various points of interest at sample U.S. national parks.

Of the parks captured within the dashboard, trends over the last month are showing:

- Overall visitation at U.S. National Parks declined 50% between mid-September/October to mid-October and November
- **However, over 70% of park visitation are travelers (vs. locals) with more than half traveling 200 miles or more**

- Visitation is very dispersed throughout the week—a good thing for social distancing. Approximately two-thirds of visitors go to parks during the week and 60% of weekday visitors travel distances greater than 50 miles
- Weekends generally have higher visitor volumes and approximately 70% of weekend visitors travel greater than 50 miles



NATIONAL PARKS DASHBOARD

Be on the lookout for a NEW dashboard featuring ski destinations across the U.S. in the next few weeks. The updated dashboard is designed to help monitor the recovery. It will include 2021 season data for over 20 ski

destinations and feature the number of unique mobile devices at each point of interest, distance traveled, origin markets and traveler vs local distinctions.

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

November 30, 2020

- About half of the 14% of Americans who said they took a trip over the Thanksgiving holiday stated they plan to quarantine for some period after their trip while the other half will resume their normal activities
- **Nearly one-in-five Americans say they plan to take a winter holiday trip**
- Anxieties about personally or loved ones' contracting the virus and the pandemic's impact on the economy are in an elevated but stable period that have not reached the peak levels seen during the two prior surges in March and July
 - Over 60% of Americans believe the pandemic is going to get worse in the next month
 - Fully half of American travelers say they have lost their interest in traveling for the time being, and 62% say if they were to travel right now, they wouldn't be able to fully enjoy it
 - **Openness to travel inspiration has been on a steady decline since October 18—now just 41% of Americans are excited about learning about new travel experiences and destinations to visit in the near-term**
- Yet, reports of vaccine developments continue to provide Americans hope about their travel future. **A majority of Americans feel the latest vaccine news makes them more optimistic they can travel safely in the next six months**
 - **Over 44% agree that their first trip after a COVID-19 vaccine becomes available will be a vacation, likely to a place far from my home**
- **Eight in 10 American travelers have at least tentative trip plans for the future**
 - Trips to visit friends and family tops the list of the type of trip Americans plan to take in the first three months following a widely available vaccine

- In trying to understand what will motivate Americans to take trips, the pandemic clearly still weighs heavy, with confidence travel can be done safely, easy cancellation policies and relaxation are top motivational attributes
- **Nearly 30% of those who have traveled by air during the pandemic said they tested themselves after their most recent commercial airline trip. Nearly 40% of Americans say they plan on taking a COVID-19 test prior to taking their next trip**

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

November 24, 2020

- **The percentage of Americans planning to change their upcoming travel plans due to COVID-19 increased to 77% in the latest survey wave—up from 69% two weeks prior**
- More than four in 10 Americans (44%) do not plan to travel until there is a vaccine available—up 10 percentage points in the past two weeks
- Americans are feeling less safe traveling outside their community—39% indicated they felt safe in the most current wave, down from 46% in early November
- Despite all of this, 62% of American travelers indicated that they have travel plans within the next six months

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

The Harris Poll CV-19 Tracker

November 25, 2020

- In an attempt to motivate Americans to get a COVID-19 vaccine once available, [some economists](#) have suggested paying people as a way to achieve herd immunity and economic stimulus
 - Yet, most Americans, say that money is not a motivator: four in 10 (39%) say they would get a COVID-19 vaccine even if the government did not pay anything, while 23% say they would not get a vaccine even if they were offered a payment

- **Two-thirds of Americans strongly support proof of vaccination in order to fly or a “no proof of immunity, no ticket” policy after COVID-19 vaccinations are widely available to the public**
 - Six in 10 (62%) of respondents say it should be a federal mandate, while the same percentage say they would support individual airlines making the requirement
- **More than two-thirds (68%) are waiting to travel again until they receive a COVID-19 vaccine**

Source: [Harris Poll](#)

2021 Global Meetings and Events Forecast

- **North American respondents estimated that 24% of their events in 2021 will include a virtual component and will be smaller local events with fewer than 25 attendees that require no air travel or lodging**
- The top two factors influencing whether to hold an in-person event are confidence in attendee health and safety components (68%) and flexible cancellation and attrition terms (59%)
- The capacity to socially distance and disinfectant protocols are top factors influencing meeting location decisions
- Meeting length is anticipated to be longest for in-person incentives/special events, at 3.6 days on average, while the longest type of hybrid meeting is predicted to be conferences/trade shows, at an average of 9.7 hours
- Almost two-thirds predict that overall meeting spend will be down and the total cost per attendee per day will be down for every meeting type
- The top five meeting destinations in the U.S. in 2021 are expected to be Orlando, Las Vegas, New York City, Washington D.C. and Dallas

Source: [American Express Global Business Travel](#)

Current Events Bring Guarded Optimism for Industry Recovery

November 24, 2020

- **Likely as a result of the recent vaccine news and election results, planners feel more hopeful than in October**—43% reported feeling hopeful compared to

33% in October, while 38% of suppliers expressed the same amount of hope as they did in October

- A higher percentage of planners are designing live experiences in post-COVID-19 physical environments: 66% vs. 57% last month, suggesting that planners are preparing for hybrid as well as digital events
- Likely in response to the spikes in COVID-19 cases across the U.S., both planners and suppliers are less inclined to travel to a business event until there is a widely distributed vaccine
 - Nearly 40% of planners and 27% of suppliers would not travel—up from 33% and 18%, respectively, the prior month
- Nearly one-quarter (23%) of suppliers did not feel that in-person events are a viable option for most groups. In addition, 34% of planners who have attended an in-person event were convinced that it would not work for groups—up from 30% the prior month

Source: [PCMA](#)

ON THE MARKETS

- There is risk of one more drawdowns before the end of the year as U.S. equity markets are slightly exhausted at the moment
- **Nevertheless, the 12-month outlook is fairly optimistic in terms of both the earnings outlook and the markets**
 - Bull markets that coincide with a new economic cycle last for years, and the business cycle tends to override the political cycle
- The S&P 500 Index is forecast to gain 10% in the next 12-months as earnings continue to surprise on the upside, but higher interest rates lead to somewhat lower valuations—a typical feature of the first year coming out of a recession
- Three critical factors are important to keep in mind for the 2021 global macro-outlook: a global synchronous recovery, emerging markets boarding the reflation train and a regime change in US inflation dynamics

Source: [Morgan Stanley](#)

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
- [Airlines Bumpy Road to Continue into 2021](#) | International Air Transport Association
- [Majority of Americans Not Comfortable Attending Sporting Events Until Vaccine](#) | Harris Poll
- [Tour Operators Forecast 2021 Recovery](#) | United States Tour Operators Association
- [Darker Outlook on Economy and Spending Heading Into Holidays](#) | Ipsos
- [Anticipating the Travel Recovery](#) | Oliver Wyman
- [Market Kalibration – October 2020](#) | Kalibri Labs
- [Cruise Industry to Lose Almost \\$20 billion](#) | StockApps
- [Assessment of Esports In-Person Event Current and Future Viability](#) | Esports Entry Advisory

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **December 8 at 1:00 p.m. ET** | [The Years Ahead: A Post-Pandemic Look at the Future of Tourism](#) | Phocuswright and Miles Partnership
- **December 9 at 10:00 a.m. ET** | [Vaccines and Vacations 2021](#) | OAG
- **December 10 at 11:00 a.m. ET** | [Ahead of the Curve: State of the U.S. Recovery](#) | Kalibri Labs, CBRE + Forward Keys
- **December 17 at 11:00 a.m. ET** | [The State of Global Affairs Beyond COVID-19](#) | BTN Content 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](#).