



This week:

Yesterday, Roger Dow and several industry leaders in Florida [met](#) with Vice President Pence, Labor Secretary Scalia, Governor DeSantis and members of the media to discuss the importance of restoring the travel industry as our country looks ahead toward recovery.

Vice President Pence and Secretary Scalia indicated their support of several of the policy proposals we have been very actively advocating such as providing travel businesses with COVID-related liability protections and the importance of modifying the Paycheck Protection Program (PPP) in the next relief package. See the full list of our legislative priorities [here](#).

The vice president was particularly interested in several of our recommended stimulus measures outlined in our [legislative priorities](#), notably our travel tax credit proposal to incentivize Americans to explore America and our proposal to allow businesses to fully deduct food and entertainment expenses, which we also heard [echoed](#) by President Trump earlier this week.

All three officials also showed appreciation of our industry's collaborative effort to develop [guidance](#) that will enhance health and safety across the entire travel experience and build consumer confidence.

[VIEW THE ROUNDTABLE](#)

Action Alert:

Congress is expected to advance legislation that would amend the Paycheck Protection Program (PPP) soon.

Please act! It is important to please [contact your Representatives and Senators](#) and ask that they work to ensure any legislation to modify the PPP expands eligibility to include destination marketing organizations, convention and visitors bureaus and chambers of commerce of all statuses.

TAKE ACTION

Updated Resources

- [Paycheck Protection Program \(Business Interruption Loans\)](#)
- [Exchange Stabilization Fund Federal Reserve Facilities and Programs](#)

UPDATED ECONOMIC IMPACT: A NATIONAL ANALYSIS

Tourism Economics released new data further confirming the dire situation the travel industry is facing:

- While the economy is in the midst of a recession, the travel industry is already in a depression
- During the worst year of the Great Depression (1933), unemployment was 25%
- Overall travel industry unemployment now stands at 51%—twice the rate of the worst year of the Great Depression
- Travel-related job losses represented 38% of all job losses through April

We have developed several resources to help communicate the impact:

- [Fact sheet](#)
- [Social media guide](#)

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 breakdown.

- **National weekly travel spending rose slightly to \$3 billion last week (its highest level since the week ending April 4) as the benefits of easing lockdown measures continue to take hold**
 - In the week ending May 16, the travel economy witnessed its third-consecutive week of expansion since the start of the pandemic but still registered 86% below last year's levels (an \$18.9 billion loss)
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$176 billion in cumulative losses for the U.S. travel economy
 - Hawaii, Massachusetts, Illinois and Washington, D.C. suffered declines exceeding 90% last week
 - On the other hand, the number of states enduring weekly losses of less than 80% increased further last week from nine to 11 states
 - Declines in travel spending have caused a loss of \$22.7 billion in federal, state and local tax revenue since March 1

[VIEW THE FULL REPORT](#)

LATEST ASSESSING RECOVERY WEBINAR

The third webinar focused on how the travel industry, and DMOs in particular, can utilize research to inform their approach to recovery moving forward. The conversation highlighted how the industry can leverage current data and trends to learn, pivot and adjust their marketing strategies—and jumpstart the recovery process when the time is right.

- **Kristen Jarnagin**, president and CEO, Discover Long Island
- **Sara Meaney**, secretary-designee, Wisconsin Department of Tourism
- **Matt Clement**, senior vice president of marketing, Arrivalist
- **Ted Sullivan**, vice president, Destination Analytics, ADARA
- **Amir Eylon**, president and CEO, Longwoods International

FULL RECORDING

A PHASED REOPENING: OPERATING AND COMMUNICATING NEW SAFETY GUIDANCE

Join us next week on **Thursday, May 28** series for a conversation with industry leaders about reopening practices as hotels, restaurants, attractions, retail and other businesses begin to welcome customers again. We will discuss their approaches and strategies as they work to coordinate with partners and businesses to implement new safety guidance within their community and across their states. You'll learn about the unique partnerships they are forging, their messaging best practices and how they are engaging with the public--both residents and visitors—as well as any challenges they are facing along the way.

REGISTER

TRACKING TRAVELER TRENDS

The following two tools show real-time data measuring the effects of COVID-19 on travel within the U.S. Tracking consumer behavior over time will help provide an early signal of returning travel activity that can inform the right time to re-deploy marketing plans and resources.

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.*

GO TO TRAVELER TRENDS

Source: [ADARA](#)

Car: Daily Travel Index

The Daily Travel Index is updated daily. This information will be provided to the industry for the foreseeable future, with updates and additional data planned in the coming weeks.

GO TO DAILY TRAVEL
INDEX

Source: [Arrivalist](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

National Tracking Poll: COVID-19 and Travel Sentiment

May 19, 2020

- **Most Americans do not yet feel safe traveling outside their home communities:**
 - 35% would be comfortable doing so today
 - 40% would not
 - 25% are neutral
- **Most Americans do not yet feel safe opening their communities to visitors**
 - 31% are supportive of opening up to visitors
 - 45% are not
 - 24% are neutral
- **Americans view positive advice from federal health officials as the most important sign that it is safe to plan domestic travel:**
 - 54% view official advice from the CDC and other federal health experts as a key cue that it is safe to travel
 - 33% view federal government advice as a key cue
 - 33% view a relaxation of social distancing rules in their state and surrounding areas as key cues

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

Coronavirus Travel Sentiment Index Report

May 18, 2020

- **The percent of American travelers saying they are avoiding travel until the coronavirus situation is over has fallen back to where it was on March 15 (62%) compared to early April (82%)**
- Millennials and GenZ travelers are showing higher levels of excitement to travel within the next month than Baby Boomers. They are also more motivated by travel by price-cuts and discounts (46% versus 23%)
- Most American travelers say they are likely to take a staycation rather than a vacation this summer (63% of those in the Northeast say so, compared to 51% of those in the Midwest)

- **Three-quarters of Americans who plan to travel this year will research how the destination they visit and its businesses are managing the coronavirus situation—demonstrating the need for destination-level information on safety**
- Most American travelers are planning to follow safety precautions on their next trip:
 - 64% say they will follow social distancing guidelines
 - 59% say they will avoid crowds
 - 57% say they will wear a face mask
- Of the 64.1% of American travelers who have one or more trips at least tentatively planned this year, seven in 10 have taken some action towards their very next trip, including:

PREPARATIONS **ALREADY COMPLETED** FOR NEXT **LEISURE TRIP**

(% of travelers selecting any of the following)



Talked to friends/relatives
about trip
(**31.7%**)



Researched things to see
and do on trip (**23.3%**)



Booked hotel, motel or inn
(**22.4%**)



Bought plane tickets
(**17.9%**)



Booked passage of a cruise
liner (**9.7%**)



Purchased train tickets
(**5.6%**)



None of these
(**29.6%**)

- The percent of conference/convention travelers saying they are avoiding these events until the coronavirus situation is over is at a 9-week low (67.5%)

Source: [Destination Analysts](#)

The Harris Poll COVID-19 Tracker

May 15-17, 2020

- Although the majority of Americans (53%) anticipate putting off their next vacation until 2021, there are segments of the population that are more eager than others
- Of "Eager travelers," those who travel the most in general, with an average of 3-4 leisure trips and 2-3 business trips in the past year, more than half are comfortable:
 - Renting a car (66%)
 - Staying in a hotel or Airbnb (66% and 57%, respectively)
 - Taking an Uber/Lyft/Cab (53%) or flying (52%)
- **Most "eager travelers" (60%+) agree that hotels and airlines have implemented enough new cleaning procedures to protect them against the virus and have already done enough to reassure them that they will be safe**
- A large majority of the "comfortable retired" segment say the following practices would have a moderate or major impact on their likelihood of flying this year, leaving a window of opportunity for airlines:
 - Sanitizing the aircraft completely between flights (82%)
 - Strictly enforced cleaning/sanitizing practices at airports (79%)
 - Keeping all middle seats empty (72%)

Source: [The Harris Poll](#)

Coronavirus Social Listening Report

May 14-21, 2020

- The conversation around coronavirus is down by 11% in the last week vs. the previous week (May 7-14) and down 79% from the mid-March peak
 - The conversation is negative at -53%.
- COVID-19-related news/deaths/cases drives the most negative sentiment
 - "recovery", "reopening", "coronavirus testing", "vaccine" drives the positive sentiment.
- Coronavirus and quarantine-related hashtags #covid19, #stayhomesavelives are most frequently used

- **Coronavirus + Travel conversation decreased by 1% in last week vs. previous week (May 7-14)**

Source: [Meredith Travel Marketing](#)

SEO Insights

May 2020

- Coronavirus content consumption continues to drop, with a decrease of 14% week over week.
- Content on how to keep people occupied at home continues to rise
- **Travel content is starting to shift to local traveling and local businesses** (like restaurants) and traveling solutions within the traveling boundaries (discovering your town/city, road-trips with a caravan, fishing/lakes, etc.)
- **Content about "what we can't wait to see or go when we can travel..." is starting to rise along with informative articles to let people know when and what is allowed in the traveling world**

Source: [Keywee](#)

Travel Intentions Pulse Survey (TIPS): Impact of COVID-19

May 1-6, 2020

The fourth wave of this survey continues to measure the impact on travel with regard to planning, booking and cancellations, as well as intention to travel (both business and leisure) over the next six months.

- **Approximately one-third of travelers remain committed to postponing, rather than canceling, scheduled travel for the months ahead**
- Most respondents do not feel safe today in any public venue:
 - 34% feel safe today in parks
 - 31% feel safe today at grocery stores/supermarkets
 - 14% feel safe today at outdoor concerts/festivals
- Only 13% of respondents say they feel safe having visitors in their home towns at this point
- One in five travelers are willing to drive 500 or more miles one-way for a leisure trip during the next six months

Source: [MMGY Global Intelligence](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [Survey on Job Loss and Rehiring](#) | American Hotel and Lodging Association
- [Survey on American Sentiment Toward Reopening](#) | AP-NORC at the University of Chicago
- [COVID-19 International Market Update](#) | Brand USA
- [Trust and COVID-19 Pandemic](#) | Edelman
- [U.S. Travel Tracker April 2020: Emerging Consumer Segments \(for purchase\)](#) | Skift
- [U.S. Hotel Performance for April 2020](#) | STR
- [Traveler Sentiment Study](#) | The Points Guy
- [Post-COVID-19 Travel Survey](#) | Zapwater

WEBINARS

Thursday, May 28: [A Phased Reopening: Operating and Communicating New Safety Guidance](#) | U.S. Travel Association

Thursday, June 4: [Data-Driven Insights: COVID-19 & the Impact on Travel Marketing](#) | Expedia

QUESTIONS?

Access top findings each week at ustravel.org/IndustryData.

Please [submit any questions](#) to us. We will do our best to reply in a timely manner.

If you have a colleague who would appreciate receiving these updates, please have them [sign up here](#).