



COVID-19 WEEKLY TRAVEL DATA REPORT

This week

- Earlier this week, U.S. Travel Executive Vice President of Public Affairs and Policy Tori Barnes [participated](#) in a media briefing with Trish Perl, a doctor and fellow at the Infectious Diseases Society of America as well as the chief of the Division of Infectious Diseases, at University of Texas Southwestern Medical Center, to discuss the latest data and consumer sentiment around travel, as well as health and safety guidance the industry is implementing. Learn more via articles in [Travel Weekly](#) and [Skift](#).
- Earlier today Congressman Tom Rice (R-SC) [introduced](#) legislation, the Healthy Workplaces Tax Credit, that would provide businesses a tax credit to safely reopen and pay for extra safety measures amid the coronavirus pandemic. Specifically the bill would provide a refundable tax credit against payroll taxes for 50% of the costs incurred by a business for COVID-19 testing, personal protective equipment (PPE), disinfecting, extra cleaning and reconfiguring work spaces to adhere to social distancing guidelines.

Resources

- We encourage you to continue to use the resources available in the [Travel Confidently Toolkit](#) to share the consistent cleanliness measures travelers can expect to see throughout every touchpoint during their trip. The toolkit also includes resources to promote the shared responsibility of travelers—including taking preventative measures such as wearing masks, practicing physical distancing and regularly washing hands—to ensure a safe and healthy travel experience for all.

ECONOMIC IMPACT: RECOVERY OUTLOOK FROM TOURISM ECONOMICS

New [research](#) from Tourism Economics examines the expected impact of the coronavirus on the travel industry for the rest of this year, as well as the potential impacts of three programs designed to accelerate the recovery: meaningful federal grants for travel promotion, a travel tax credit to spur travel and create a demand for job growth, and an industrywide initiative to assure, inspire, motivate and encourage Americans to plan, book and travel in the U.S.

- Through the end of 2020, the report estimates **\$505 billion in losses** for the travel industry for a total of **\$81 billion in lost federal, state and local taxes by the end of 2020**. The travel industry is not expected to recover until 2024.
- The three recovery initiatives would generate an estimated **\$71 billion for the travel industry** by the end of 2021, delivering **\$163 billion in economic output and restore nearly 800,000 jobs**.
- U.S. travel members can the [full report here](#); login required. Nonmembers can access the associated [data table 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 breakdown.

- **The recovery in the travel industry slowed last week and national weekly travel spending fell by 10% compared to the prior week, which included the Fourth of July holiday. Compared to two weeks ago, travel spending increased by 5%**
 - In the week ending July 11, the travel economy slowed down after a busy Fourth of July holiday. Despite this decline, travel spending remains higher than its level two weeks ago, even without the assistance of the holiday weekend, but still registered 50% below last year's levels (a \$11.6 billion loss)

- Car trips fell precipitously, down about 18% from the prior week, while air travel remained roughly the same
- The District of Columbia and Hawaii continued to suffer year-over-year declines exceeding 70%. Excluding Washington, D.C. and Hawaii, the number of states with declines exceeding 50% grew from five to 13
- Looking at the two-week trend to eliminate the temporary performance boost of the Fourth of July holiday, most states have been improving; the only exceptions are South Carolina, Florida, Arizona, Texas, North Carolina, and Tennessee
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$285 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$36.5 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

Planning for Recovery Amid Rising Cases and Shifting Consumer Sentiment

The latest webinar in the Assessing Recovery series focused on expectation management, consumer segmentation and emotional response strategies based on data that brands should be considering when planning for recovery. Mike Dabadie of Heart+Mind Strategies provided valuable insights on how to effectively adapt messaging to better connect with consumers in today's shifting environment. Find the full slide deck [here](#).

Featured speakers:

- Mike Dabadie, co-CEO and founding partner, Heart+Mind Strategies

Key findings:

- 71% of Americans expect some permanent routine changes as a result of COVID-19. Longer-term changes are expected in areas such as cooking, exercise, work/home life balance, hobbies, tech and online tools, education and parenting
- 81% of Americans believe we need to continue making changes to treat Blacks equally to whites
- About a quarter, 23%, of the country's population over 18 years of age are considered "hopeful optimists"—more likely to travel and take risks
- **Travelers increasingly rank travel as a routine they miss the most, along with connecting with friends**
- 66% of Americans are confused by messages from the federal government
- Based on a list of societal and individual values, personal emotions around security, social order and freedom have worsened by more than 25% in the last month

FULL RECORDING

Advancing Industry Priorities in Phase 4 COVID-19 Relief Legislation

Thursday, July 23 2020 | 12:00 p.m. ET

The webinar next Thursday at 12:00 p.m. ET will provide an update on U.S. Travel's advocacy efforts to secure relief, protection and stimulus for the travel industry in phase 4 coronavirus relief legislation, as well as anticipated timing and next steps for the bill. Attendees will also learn how a travel organization successfully navigated and used relief provided under the CARES Act.

REGISTER NOW

Access all Assessing Recovery webinar recordings at ustravel.org/assessing-recovery

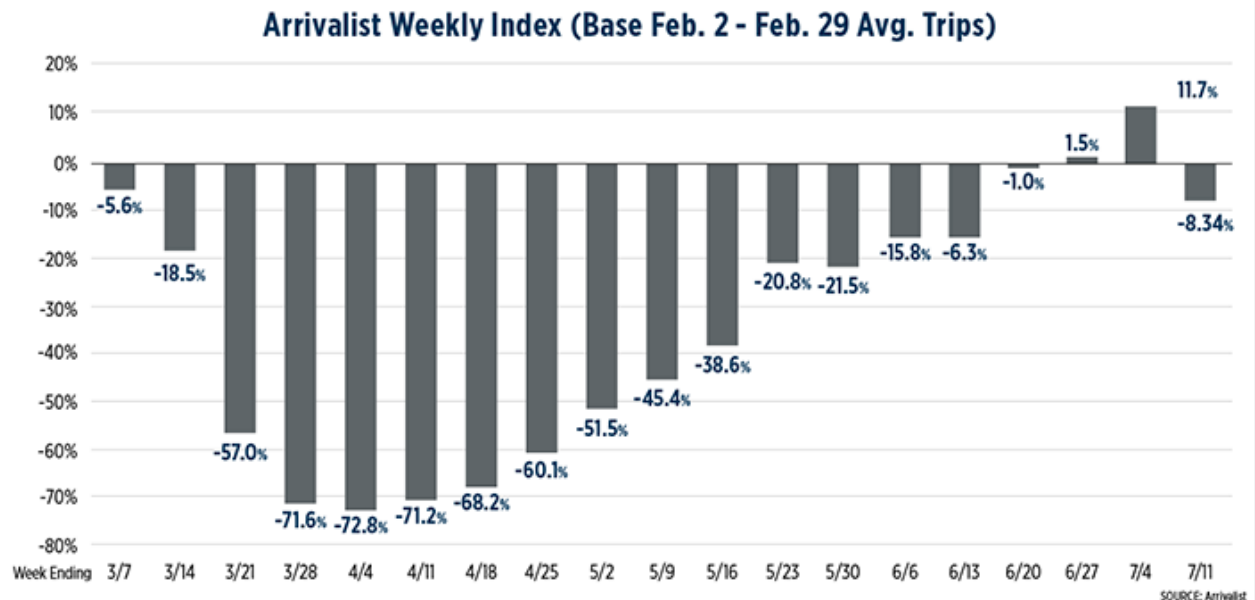
TRACKING TRAVELER TRENDS

While the number of travelers flying last week remained steady (though very subdued compared to last year), trends for future bookings have regressed in recent weeks. Road travel continued to perform significantly better than air travel but declined from levels seen in recent weeks and is again below pre-pandemic (February) levels.

Car: Daily Travel Index

Arrivalist's Weekly Travel Index and [Daily Travel Index](#) measures consumer road trips of 50 miles or more in all 50 U.S. states.

- **After surpassing pre-pandemic levels over the Fourth of July holiday, road travel declined to its lowest level since early June last week**
 - Road travel last week was 8% lower than it was right before the crisis (in Feb. 2020), the lowest it has been since the week ending June 6
 - Road travel over the last seven days (through Sunday July 12) was 19% lower than the previous seven days, largely due to increased travel the previous week due to the Fourth of July holiday



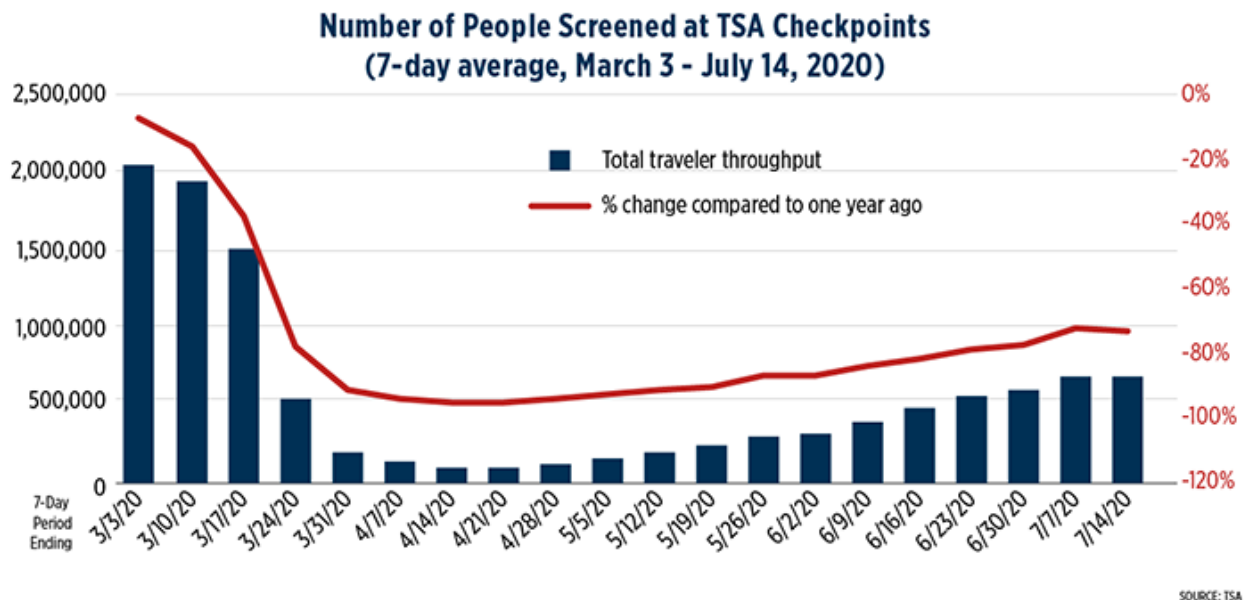
GO TO DAILY TRAVEL INDEX

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.

- **TSA screenings remained above 700,000 over the past weekend. Sunday's high of 755,000 was only slightly below the pre-July 4 peak of 765,000**
- The 7-day average of screenings (through Tuesday July 14) was 672,000, the same as in the previous 7-day period, which included the Fourth of July holiday
- On a year-over-year basis, TSA screenings in the latest 7-day period were still 74% lower than in the same period last year

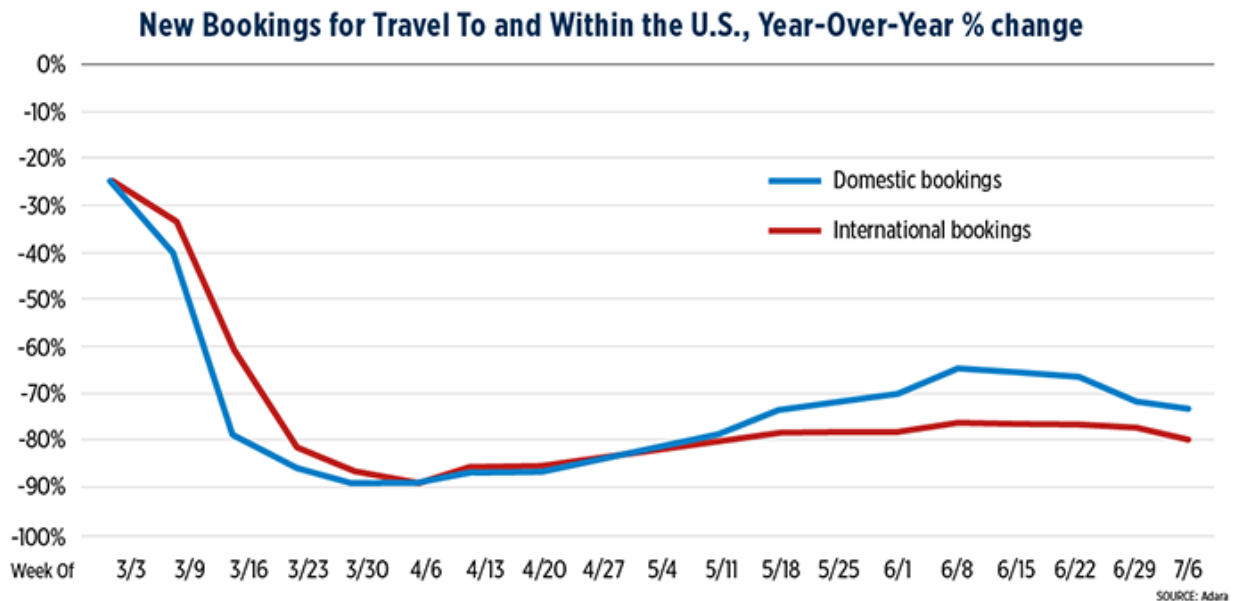


Source: [TSA](#)

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.

- **The trend in domestic air and hotel bookings for future travel continued to regress for the fourth week in a row (from -64% year-over-year in early June to -73% in early July)**
 - Domestic bookings to Wyoming (-22%) exhibited, by far, the lowest year-over-year decline, though they still regressed from two weeks earlier (-15%). Montana (-26%) and Idaho (-40%) followed
 - Domestic bookings to New York (-83%), Massachusetts (-79%) and New Jersey (-76%) saw the highest declines, and all performed worse than two weeks earlier
- International bookings for future travel to the U.S. regressed from -76% in June to -79% in early July



[GO TO TRAVELER TRENDS](#)

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, U.S. Travel is offering an exclusive [dashboard](#) that 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. This product can serve as a leading indicator to help destinations better understand American travel trends related to drive markets and outdoor recreation locations in the U.S. *Note: the Visitation Tracker will be paused next week as it undergoes a refresh with new data available the week of July 20. We appreciate your understanding.*

GO TO DASHBOARD

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

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.

VIEW LATEST RESULTS >

SOURCE: MMGY Travel Intelligence

Coronavirus Travel Sentiment Index Report

July 13, 2020

- **The recent surge in COVID-19 cases has greatly affected travel sentiment:**
 - **The perceived safety of travel related activities has worsened significantly since early June, and the percent of travelers agreeing they will be traveling in the fall has dropped from nearly 50% in early June to 36%**
 - The percent of respondents who say they would be happy to see an ad promoting their community for tourism when it is safe remains depressed below 40%
 - In addition to wreaking havoc on their sense of safety, Americans feel the virus has made travel's ability to deliver fun and relaxation, as well as culinary and cultural enrichment, especially difficult, if not impossible
- In terms of sentiments toward meetings and events:
 - Three-quarters of American travelers are unlikely to attend conferences and conventions until the coronavirus situation is resolved
 - According to a survey of meeting planners, less than half (48%) of meeting planners believe the first half of 2021 is the soonest live events should be held and nearly one-third (32%) believe live events should not be held until the second half of 2021 or later
 - **Meeting planners believe the first groups to return to live events will likely be sport groups/organizations or corporate/private sector businesses while international associations and school groups will be the slowest to return to live events**

Source: [Destination Analysts](#) and Coronavirus Travel Sentiment Index Report
Presentation of Findings Week of July 12, 2020 (Webinar)

The Harris Poll CV-19 Tracker

July 2-4, 2020

- **More than three-quarters (77%) of respondents support states enacting mandatory 14-day quarantines for out-of-state travelers from states with a high resurgence of COVID-19**
 - **Women are more likely than men (81% vs. 73%) to support this**
- While 43% say they miss flying on a plane, only 37% say they feel safe flying right now. The family car is viewed as the only safe mode of transportation:
 - 90% feel safe traveling by car but only 40% feel safe in an Uber and 39% on a train
- 58% of leisure travelers say they will substitute vacations with staycations for the remainder of the year

- **74% of business travelers are more likely to substitute business meetings that require flying with virtual meetings for the remainder of the year**
- 39% of respondents say they are planning a vacation once things return to normal but 73% say their travel vacations will be very or somewhat different even after the pandemic ends

Source: [The Harris Poll](#)

Back-to-Normal Barometer

July 8, 2020

- **The vast majority of respondents say that the possibility of a second wave of COVID-19 cases is affecting their willingness to travel in coming months:**
 - **2/3 of respondents stayed home over the Fourth of July weekend and most said they altered their original holiday plans in some way due to the pandemic**
 - **More than a quarter say they are specifically avoiding large cities due to COVID-19 and social unrest**
 - **A common concern among many Americans is that others are being less diligent in their adherence to safety protocols than they are**
- The percentage of people willing to stay at a hotel or resort has declined considerably with only 36% now saying they are “ready to go without hesitation”, compared to 55% in early June
- Top reasons for avoiding summer travel include:
 - Other people not protecting their own health there (67%)
 - Lots of sites and attractions are closed (66%)
 - “It’s going to be like lockdown at home, but only a bit more scenic” (54%)
 - Social unrest might break out there (53%)

Source: [Engagious](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [2020 Summer Forecast](#) | AAA and HIS Markit
- [Global Economy Reopening Tracker](#) | Cushman & Wakefield

UPCOMING INDUSTRY WEBINARS

- **July 21 at 2:00 p.m. ET:** [COVID-19 Research Update](#) | Brand USA
- **July 28 at 10:00 a.m. ET:** [Global Scientific Summit](#) | WTTC/Carnival Corporation Summit on COVID-19
- **Ongoing:** [COVID-19 Webinar Series](#) | Expedia Group Media Solutions

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.

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](#).