



COVID-19

WEEKLY TRAVEL DATA REPORT

This week

With a complicated political landscape in Washington, including the passing of Supreme Court Justice Ruth Bader Ginsburg and the upcoming election, it remains unclear whether a larger, or even small, coronavirus relief bill will happen before November 3.

We remain fully committed to looking at every opportunity and continue to engage aggressively to help urge Congressional action.

Congresswoman Jaime Herrera Beutler (R-WA) is [expected to file](#) a discharge petition tomorrow at 9:00 a.m. ET, a tool that would force a vote on a bill introduced by Congressman Steve Chabot (R-OH) which would provide critical small business relief. This includes extending the Payment Protection Program (PPP) to the end of 2020, as well as expanding PPP to destination marketing organizations and allowing for a second draw on PPP for businesses with demonstrable revenue loss.

To move forward, the petition needs 218 signatures. **Please be ready to help us secure these signatures when we send an Action Alert out tomorrow.** There is not a moment to waste and we must capitalize on this opportunity.

You can access our full [advocacy toolkit here](#), which now includes an updated [social media guide](#).

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



As Phase 1 nears its conclusion at the end of the month, the [Let's Go There campaign](#) continues to build momentum. On September 22, the Let's Go There Coalition hosted its second homepage takeover, with businesses and destinations incorporating the campaign logo and messaging on their homepage. Thank you to all organizations, businesses and destinations who have gotten involved. A summary of results will be shared in next week's newsletter.

The Coalition has begun discussing plans for Phase 2 (set to resume mid-November) and Phase 3.

[VIEW THE WEEKLY RECAP](#)

A [suite of resources](#) for use by the industry remain available: [Let's Go There](#) for those who are ready to start promoting travel now, and [Let's Go There, Soon](#) for those who wish to participate but are not yet actively marketing to travelers. You can access the full toolkit(s) below.

[VIEW THE TOOLKIT](#)

NEW FINDINGS:

IMPACT ON SMALL BUSINESSES

- **55% of small businesses are expecting either to never recover or to take longer than six months to recover**
- The outlook for the travel industry, 83% of which are small business, is even more dire:
 - A massive 95% of all Accommodation and Food Service employment is found within small and medium-size businesses. The share is 82% for the arts, entertainment, & recreation sector
 - Among small businesses, Accommodations and Food Service is expected to suffer the largest negative effect and has the greatest share of businesses expecting a recovery to take more than six months

Source: [Oxford 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.

- **Travel spending shrank by 5% last week—continuing the downward trend following Labor Day Weekend—as the shift from the summer travel season has left the travel industry more exposed to the virtual absence of business and group travel**
 - In the week ending September 19, travel spending tallied just \$12.1 billion, reflecting a 45% drop below last year's levels (a \$10 billion loss); this is significantly worse than the 30% drop two weeks ago
 - The number of states and territories experiencing losses exceeding 50% increased from six to nine, with Vermont, Connecticut, Washington, and Rhode Island joining, and Puerto Rico improving beyond this threshold
 - The New England subregion contracted significantly with every state experiencing at least a five-percentage point decline. New Hampshire suffered the largest year-over-year (y/y)

- California, Oregon and Washington felt the effect of twin tragedies from the ongoing pandemic and West coast wildfires, as the Pacific subregion saw travel spending fall 10% from the prior week
- Since the beginning of March, the COVID-19 pandemic has resulted in over \$386 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$49.6 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

The Safe Return to Hosting Meetings and Events

Earlier today during the latest webinar in the Assessing Recovery series, Visit Indy provided details on their recent success hosting meetings and events amid the COVID-19 pandemic, including the partnership between their Recovery Task Force, the Indiana Convention Center, the local health department and other community entities. The webinar also included a look into a new user-generated meetings content portal powered by the Meetings Mean Business Coalition in partnership with Simpleview, which will be released soon. View the [full slide deck here](#).

Featured speakers:

- Cara Frank, chief of staff, Simpleview
- Leonard Hoops, president and CEO, Visit Indy
- Andy Mallon, executive director, Capital Improvement Board
- Susie Townsend, SVP of visitor experience, Visit Indy
- Monique Wise, senior sales manager, Indiana Convention Center

FULL RECORDING

Stay tuned for more details about our next *Assessing Recovery* webinar, which will take place on Thursday, October 1 at 12:00 p.m. Details are forthcoming. Access all recordings on our [Assessing Recovery series webpage](#)

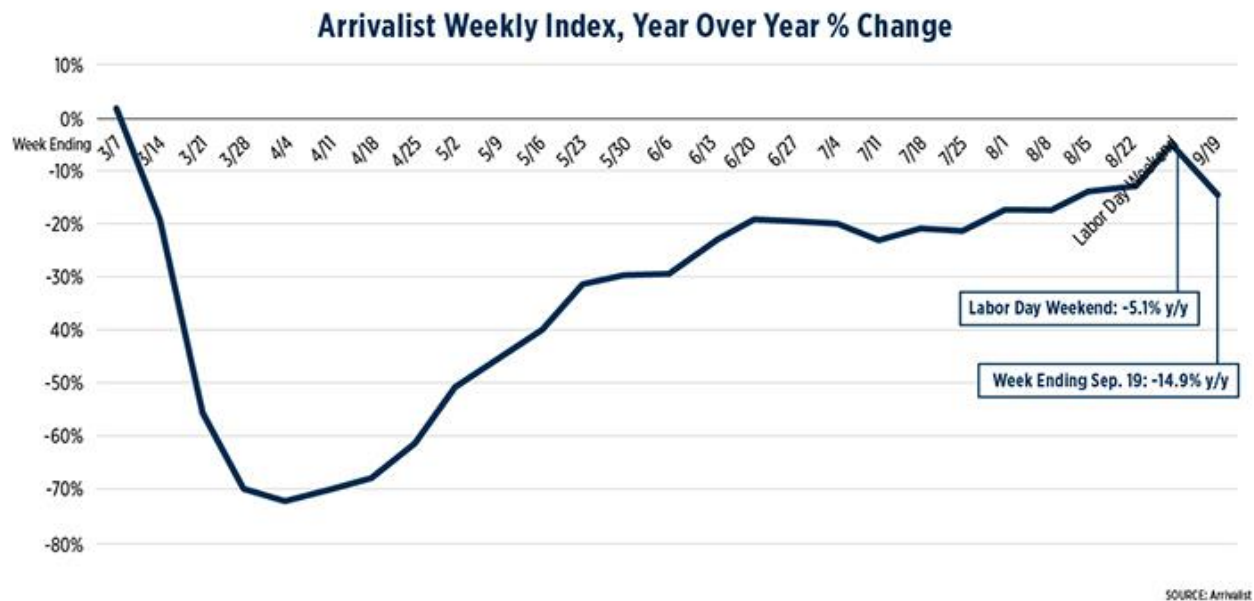
TRACKING TRAVELER TRENDS

Air travel increased slightly since the previous week, but year-over-year (y/y) rates (-69%) remain roughly the same as they have been throughout the summer. Road travel slowed down last week, after performing particularly well over Labor Day weekend. Domestic bookings for future air and hotel travel have improved substantially, though they remain deep in negative territory.

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 slowed down considerably after Labor Day weekend and performed significantly worse than the same period in 2019**
 - After experiencing levels that nearly matched those of 2019 over the Labor Day travel period (just -5.1% compared to 2019), road travel performed significantly worse last week (-14.9% y/y)
 - The latest y/y declines are worse than the past few weeks but similar to those of mid-August and significantly improved 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.

- **After a decline following Labor Day weekend, the latest seven-day average of screenings (through Tuesday September 22) was back above 700,000**
 - At 712,000, it was 4.2% higher than the previous week
- Screenings over the last seven days were 69% lower than in the same period last year, similar to the previous week and most weeks of summer



Source: [TSA](#)

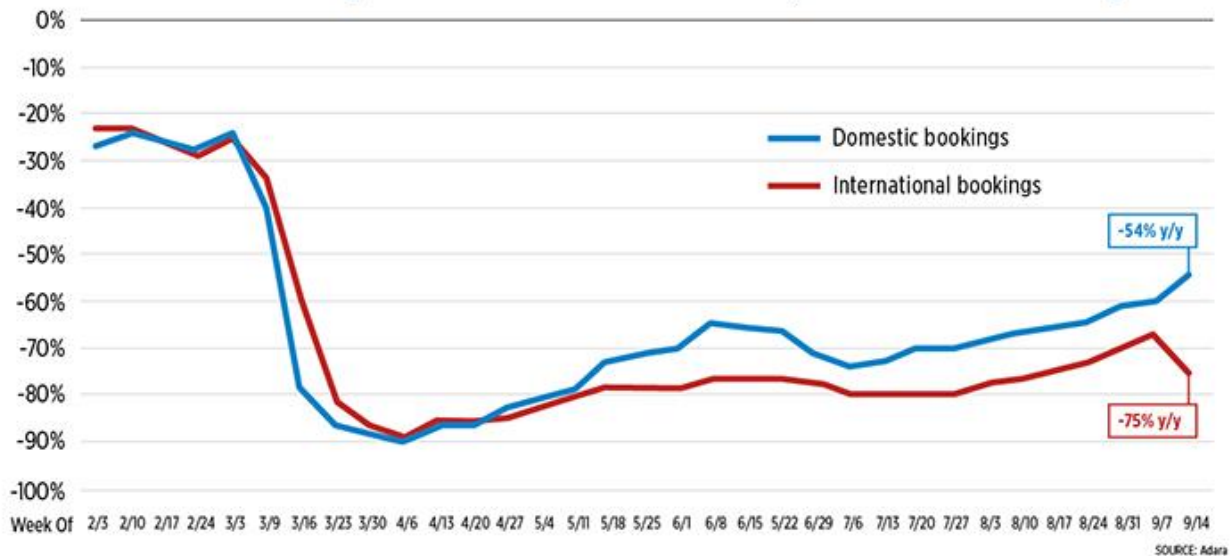
Hotel and Air: Traveler Trends Tracker

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 improved significantly—from -60% y/y two weeks ago to -54% y/y last week**
- **Though they remain deep in negative territory, they have been steadily improving since early July**
 - Domestic bookings to Montana (-7%), Wyoming (-8%) and Idaho (-15%) again experienced the lowest y/y declines
 - Domestic bookings to New York (-74%), Massachusetts (-67%) and New Jersey (-66%) saw the highest declines, but improved compared to the previous week
- International bookings for future travel to the U.S. fared significantly worse than domestic bookings and fell from -67% y/y two weeks ago to -75% y/y last week

Searches and Bookings for Travel to and Within the U.S., Year-Over-Year % Change



TRAVELER TRENDS TRACKER

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

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

- Visitation to U.S. National Parks remained steady week over week stalling the declining tendency since mid-August
- Most U.S. National Parks are experiencing slight week over week declines while many urban National Historical Parks are either maintaining or moderately growing visitation
- Local (under 25 miles) visitation grew week over week with overnights (201+ miles) declining week over week

NATIONAL PARKS DASHBOARD

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report September 21, 2020

- **Amidst rising stress, Americans are reporting stronger prioritization of relaxation and many (54%) are “ready to travel” to achieve it**
 - The level of excitement for learning about new travel experiences or destinations is at a pandemic-period high—not seen since the end of May, at the start of the summer season
- Over half of respondents continue to say they are at least somewhat confident they can travel safely in this environment
 - Unlike earlier on in the pandemic, less than 50% now consider staying in a hotel, dining in a restaurant or visiting an amusement park to be unsafe
 - Just 37% agree they need a vaccine to travel, down from a high of 45% at the start of August
- In April, nearly 40% agreed they would change the destinations they traveled to, now less than 20% agree
 - Even among those saying they will change the types of destinations they visit, more positive reasons are now being offered, including an increased willingness to explore new destinations and crossing places off their bucket lists

Source: [Destination Analysts](#)

The Harris Poll CV-19 Tracker

September 20, 2020

- **One-third of respondents (36%) said they would be comfortable driving to an in-person event now and more than half (54%) said they would be comfortable attending if the convention site imposes risk-reducing requirements like face masks, temperature screening and social distancing**
 - By a margin of 2 to 1, respondents prefer in-person events over virtual events because they're better for such things as networking, socializing, new product tryouts and business leads
 - Four in 10 (43%) said they had attended an in-person trade show, expo, conference or convention prior to the pandemic, with three-quarters (73%) saying they had gone to as many as five events in 2019
- Asked when they would feel comfortable driving to another city to attend an in-person trade show or convention (without a widely available vaccine), 36% said immediately while 25% said within six months
 - When asked about flying to such a mass meeting, only 14% said immediately

Source: [Harris Poll](#)

iMeet Survey of Meeting Planners

September 20, 2020

- **More than eight in 10 (83%) planners currently have events booked and contracted in 2020 or 2021 (up from 75% last week)**
- Planners who believe they will resume face-to-face meetings by the end of the year improved to 22%, up from 20% last week, while 72% of respondents anticipate they will resume face-to-face events sometime in 2021
- More than half of planners anticipate they will resume face-to-face meetings in the first half of 2021, with 14% resuming in Q1 and 37% resuming in Q2

Source: [iMeet](#)

Taking the Route Less Traveled

- The role of the personal car is more than two times greater than it was for pre-COVID-19 trips, while the likelihood of renting a car for a leisure trip is three times higher
- Travelers continue to make more last-minute decisions
 - Most searches are occurring 0-21 days out on Expedia Group websites

Source: [Expedia Group Media Solutions](#)

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

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Travel Industry Turned Upside Down](#) | McKinsey & Company
- [Stronger Together Webinar Series Recordings](#) | Forbes Travel Guide
- [Vaccine Resistance Grows](#) | Axios-Ipsos Poll
- [Ahead of the Curve: New York City](#) | Kalibri Labs

UPCOMING INDUSTRY WEBINARS

- Ongoing | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- September 28 at 1:00 p.m. ET | [Reviving Travel in Small and Midsize Companies](#) | Business Travel News
- September 28 at 1:00 p.m. ET | [Health and Safety Measures to #Stayprofitable](#) | Ipsos

- **September 30 at 8:00 p.m. ET** | [Global Travel and Tourism Team Check In: Japan](#) | U.S. Commercial Service
- **September 30 at 12:00 p.m. ET** | [Three Wellness Must-Haves for Your Travel Program](#) | Business Travel News
- **October 5-8** | [2020 Marketing Outlook Forum](#) | Travel and Tourism Research Association
- **October 7-8** | Travel 2021 Summit: [Explore the New Face of Travel in a Virus-Weary World](#) | VRBO

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](#).