



This week:

With negotiations for the next relief bill underway, U.S. Travel has developed [top priorities](#) for continued relief, to establish liability protections for travel businesses and needed stimulative priorities. We have been discussing these and other issues with Congress and the Administration.

Yesterday, U.S. Travel's corporate CEO Roundtable convened for meetings which included virtual discussions with U.S. Secretary of the Treasury Mnuchin, Minority Leader Schumer and Speaker Pelosi on the relief and stimulus measures needed to ensure the travel industry is best positioned to help drive recovery.

On Tuesday, the U.S. House of Representatives released the "[Health and Economic Recovery Omnibus Emergency Solutions](#)" Act (the HEROES Act) outlining their recommendations for the next phase of economic relief. Eligibility for the Paycheck Protection Program (PPP) was extended to all 501(c) nonprofits—a provision U.S. Travel has been aggressively fighting for since the CARES Act—and several structural changes were also addressed. However, more work remains to be done, including ensuring quasi-government organizations have access to PPP loan forgiveness, a top priority of our current efforts.

Updated Fact Sheets

- [Grants for Tourism and Airports and Delay on REAL ID Enforcement](#)
- [501\(c\)\(6\) Resources](#)

NEW WEBINAR SERIES

The second webinar in U.S. Travel's new weekly Assessing Recovery series focused on the assurances travelers need in order to feel safe traveling again. The webinar dove into the latest findings from the [Back-to-Normal Barometer](#), a new study listening to the voice of the leisure activity customer. [Access the full slide deck here.](#)

- **Roger Dow**, president and CEO, U.S. Travel
- **Rich Thau**, co-founder and president, Engagious
- **Jon Last**, founder and president, Sports and Leisure Research Group

FULL RECORDING

Next week's webinar, on **Thursday, May 21 at 12:00 p.m. ET**, will focus on how the travel industry, and DMOs in particular, can utilize research to inform their approach to recovery moving forward. This candid conversation will consider how the industry can leverage current data and trends to learn, pivot and adjust their marketing strategies—and jump start the recovery process when the time is right. Featured speakers include:

- **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

REGISTER

Stay tuned for additional webinars to be announced for the following Thursdays.

ECONOMIC IMPACT: NATIONAL ANALYSIS

Initial findings in a new analysis suggest that **while the economy is headed for a recession, the travel industry is in a depression**: overall travel industry **unemployment is 51%—twice** the unemployment of the worst year of the Great Depression. Additional insights will be shared next week.

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 modestly to \$2.9 billion last week (returning to levels experienced the week ending April 11) as the benefits of easing lockdown measures began to take hold**
 - In the week ending May 9, the travel economy witnessed its second-consecutive week of expansion since the start of the pandemic but still registered 87% below last year's levels (a \$19 billion loss)
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$157 billion in cumulative losses for the U.S. travel economy
 - Four states witnessed losses of over 90%, and Hawaii and Washington, D.C. endured yet another week of declines exceeding 95%
 - Notably, the number of states enduring weekly losses of less than 80% increased again last week from six to nine states
 - Kentucky, Nebraska, Montana, and Alabama saw their percentage decline improve by more than 5%
 - Declines in travel spending have caused a loss of \$20.3 billion in federal, state and local tax revenue since March 1

SEE FULL REPORT

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 provides the industry with updates and additional data planned in the coming weeks for the foreseeable future.

GO TO DAILY TRAVEL INDEX

Source: [Arrivalist](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

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

May 1-6, 2020

The fourth wave of this survey continues to track travel intentions and behavior for 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**
 - Activities with the longest booking windows, such as vacation rental homes and cruises, are still the most likely to remain unchanged
- 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
- Most travelers (68%) still feel safe today in their personal vehicles
- 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](#)

National Tracking Poll: COVID-19 and Travel Sentiment

May 12, 2020

- **Americans are divided about traveling and reopening their communities to visitors:**
 - Regarding traveling outside their communities:
 - 40% feel safe
 - 33% do not and the
 - The remaining 27% rest are undecided
 - Regarding welcoming visitors to their communities:
 - 35% support
 - 35% oppose
 - The remaining 30% are undecided.

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

Coronavirus Travel Sentiment Index Report

May 11, 2020

- Nearly 7-in-10 respondents say they miss vacationing a lot and over half miss the very act of planning vacations
- However, most are worried about traveling again in the period after coronavirus

IN THE PERIOD AFTER **CORONAVIRUS**, HOW ARE YOU GOING TO APPROACH GETTING BACK INTO TRAVEL?



- Nearly half (45%) of respondents are planning some type of road trip (an average of roughly 400 miles away from home) through the end of August
- Travelers are exhibiting strong trust in official destination marketing organizations
 - When asked about the resources they would trust to provide the information needed to travel safely, DMOs were cited second behind friends and family
- In reaction to new safety protocols being introduced, most travelers say they make them feel safer but some say they stimulate anxiety

- Crew disinfecting an airplane: Safe (63.6%) Anxious (21.7%)
- Temperature checks at airports: Safe (56.2%) Anxious (30%)
- Servers in restaurants wearing masks: Safe (48.8%) Anxious (25.3%)

Source: [Destination Analysts](#)

Back-to-Normal Barometer

Late April 2020

- When it comes to feeling comfortable resuming travel activities without hesitation, the following developments or assurances alone will have the strongest impact:
 - Approval of a COVID-19 vaccine: 46% say it alone would be a sufficient to stay at a hotel again without hesitation
 - Approval of a pharmaceutical protocol to mitigate the effects of COVID-19 (21%)
 - Assurance from a reputed national (24%) or local (19%) medical authority that it is safe to do so
- **Assuming they had the necessary assurances that it was safe to do so, most respondents would stay at least one night at a hotel or other paid lodging (64%) or visit a theme park (59%) within three months:**
 - **17% (hotel) and 12% (theme park) would do so immediately**
 - **17% (hotel) and 15% (theme park) within one month**
 - **18% (hotel) and 13% (theme park) within two months**
 - **12% (hotel) and 19% (theme park) within three months (for a cumulative 64% or 59% within three months)**
- 63% of travelers agree that they would be more likely to visit a public place or fly on an aircraft that displays a certificate issued by a local government authority indicating that it has adhered to established protocols for sanitization

Source: [Engagious](#)

2020 Return to Live Events Survey

April 2020

- The vast majority (94%) of event attendees have been missing attending live events
 - 76% are very likely to return after large gatherings are permitted, nearly half of which would return within two weeks of the resumption of large gatherings
 - On the other hand, 18% will not attend any live event until a vaccine is available

- Event attendees generally welcome additional safety precautions: 75% say they are more likely to return if proper sanitation precautions are taken
- While some attendees would welcome more extreme safety precautions, others would be opposed to such measures:
 - Two-fifths say they are more likely to attend an event that performs body temperature checks upon entry
 - 27% say they are less likely to attend if required to wear masks
- **Of those who traveled out of town to events in the past two years, 89% say they plan to travel to events again**

Source: [Enigma Research](#)

ADDITIONAL FINDINGS

Coronavirus Social Listening Report

May 7-14, 2020

- The conversation around COVID-19 is down by 8% in the last week vs. the previous week (April 30-May 7) – and down 75% from mid-March peak
- The conversation is negative at -47% (same as previous week)
 - COVID-19-related news/deaths/cases drives the most negative sentiment
 - "recovery" and "free coronavirus testing" drives the positive sentiment
- The top 5 most-mentioned states are: New York, California, Florida, Texas, Washington
- **The Coronavirus + Travel conversation increased by 5% in last week**

Source: [Meredith Travel Marketing](#)

Recovery and Destination Perceptions

May 11, 2020

- **While meeting planners expect some meetings and events to pick up late in the summer, many meeting professionals are eyeing the first half of 2021 for a full recovery:**
 - 23% anticipate a full recovery in the first quarter of 2021
 - 22% anticipate a full recovery in the second quarter of 2021

- 70% of meeting planners view "Online/Virtual" meetings in a more positive light than before the coronavirus pandemic

Source: [Meeting Professionals International](#) sponsored Discover Puerto Rico

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [Malls in America: A Grand Reopening?](#) | Arrivalist
- [Events After COVID-19](#) | Freeman
- [America Loosens Up as COVID-19 Continues to Expand](#) | Ipsos
- [COVID-19 Impact: Recovery Analysis](#) | Kalibri Labs
- [Day One/30/60 Post COVID-19](#) | MOWER
- [Travel Consumer Feedback and Reflections During COVID-19](#) | Texas A&M University Recreation Park and Tourism
- [COVID-19 Impact Research Resources](#) | UberMedia

WEBINARS

Friday, May 15: [COVID-19 Research Update](#) | Brand USA

Thursday, May 21: [Assessing Recovery: The Three Legs of Research](#) | U.S. Travel Association

QUESTIONS?

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