



This week

Good news! State and local governments may use the Coronavirus Relief Fund (CRF) for travel promotion: The U.S. Department of Treasury [issued new FAQs](#) this week for the CRF, which clarifies that state and local governments may provide CRF funds to destination marketing organizations to re-market convention facilities and the tourism industry. The new FAQ was issued in response to a U.S. Travel [letter](#) submitted to U.S. Treasury Secretary Mnuchin seeking clarity on the CRF and asking for guidance on the use of these funds for DMOs.

- **CRF funds are granted to state and local governments, who in turn can allocate these funds to respond to fallout from the coronavirus pandemic, including providing funds to DMOs.**
- **According to the FAQ, "expenses incurred to publicize the resumption of activities and steps taken to ensure a safe experience may be needed due to the public health emergency."**

Additional Update

On Monday, U.S. Travel released the [#TravelConfidently, a shared responsibility toolkit](#) broadly throughout the travel industry. These resources can be used to inspire confidence in travelers that they will see consistent health and safety measures throughout their entire journey and remind travelers and residents that they, too, have a role to play when it comes to ensuring a healthy and safe travel experience for all. We encourage you to incorporate [these resources](#) in your own communications and share them with your members and audiences.

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.

- **National weekly travel spending grew by 5% to \$10.6 billion last week (again marking its highest level since March), but growth is showing signs of tapering as some states slow the easing of lockdown measures**
 - In the week ending June 20, the travel economy witnessed its eighth-consecutive week of expansion since the start of the pandemic but still registered 55% below last year's levels (a \$13.2 billion loss)
 - The 5% increase registered last week was the smallest increase since the week ending May 16
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$250 billion in cumulative losses for the U.S. travel economy
 - States without large urban centers, such as Alabama and Mississippi, experienced large improvements last week. Conversely, some states saw muted growth or even slight declines compared to the previous week, most notably New York
 - The number of states with year-over-year losses of less than 50% grew to 22, but the District of Columbia, Hawaii, and Massachusetts continued to suffer declines exceeding 70%
 - The continual depressed level of travel spending has caused a loss of \$32 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

[Assessing Recovery: The Shared Responsibility of
Traveler Health and Safety](#)

During today's webinar, Dr. Mike provided a candid update on the state of the pandemic several weeks into the reopening process, as well as why health and safety throughout the travel journey is a shared, social responsibility, while Steven Paganelli of Tripadvisor walked through the latest findings regarding what travelers need from companies to restore their confidence. The webinar also provided an overview of new toolkit materials available to help travel businesses communicate the steps they are taking so that visitors and customers can #TravelConfidently, and the role travelers, too, have to play.

Featured speakers:

- **Dr. Michael Parkinson**, MD, MPH, past president, American College of Preventative Medicine
- **Steven Paganelli**, group head of destination marketing, Americas, Tripadvisor
- **Sarah Shields**, director of industry communications, U.S. Travel Association

Webinar resources:

- [Findings from Tripadvisor](#)
- [#TravelConfidently \(A shared responsibility.\) video](#)

FULL RECORDING

Missed a previous webinar? Access them all at ustravel.org/assessing-recovery

Lessons in Race and Racism: A Continued Discussion

June 26, 2020 | 10:30-11:30 a.m. ET

U.S. Travel Association National Chair and Destination DC President and CEO Elliott Ferguson and other industry leaders from the Black community will continue the conversation around what we can do as an industry to develop and elevate diverse voices and move our industry—and our country—toward equality. It will be guided by several prevalent themes that surfaced from the dozens of questions submitted during the June 11 webinar.

Featured speakers:

- **Melvin Tennant**, president & CEO, Meet Minneapolis
- **Al Hutchinson**, president and CEO, Visit Baltimore
- **Monica Smith**, president and CEO, Southeast Tourism Society

REGISTER NOW

TRACKING TRAVELER TRENDS

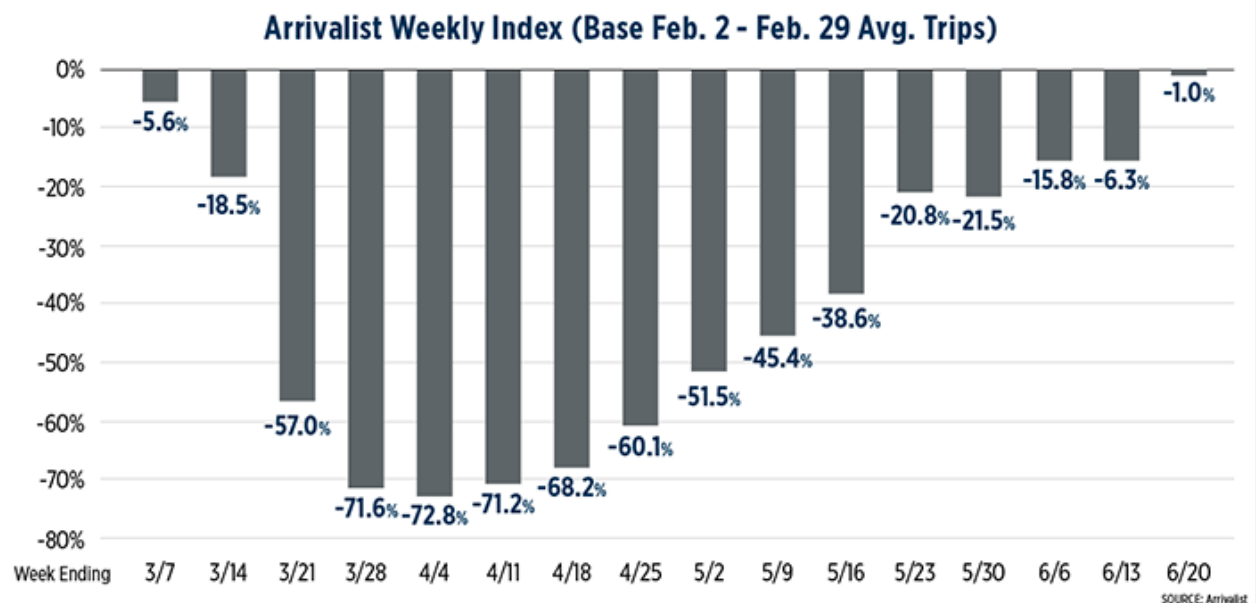
Both road travel and passenger screenings again increased last week, with road travel nearing pre-pandemic levels. However, looking ahead, domestic air and hotel bookings for future travel regressed slightly last week, though they remain improved from their peak decline during the week of April 6.

Car: 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 increased again last week and is now nearly at pre-pandemic levels:**
 - Road travel last week was only 1% lower than it was right before the crisis (in Feb. 2020)*
 - In comparison, road travel was 73% lower than its pre-crisis (Feb. 2020) average in the first week of April
- Road travel over the last seven days (through Monday, June 22) was 6.5% higher than the previous seven days

***Please note:** While this recovery is impressive, the comparison is between June (generally a busy travel month) and February (a slow travel month). Year-over-year data that will compare to the same month last year will be available within the next two weeks.



[GO TO DAILY TRAVEL INDEX](#)

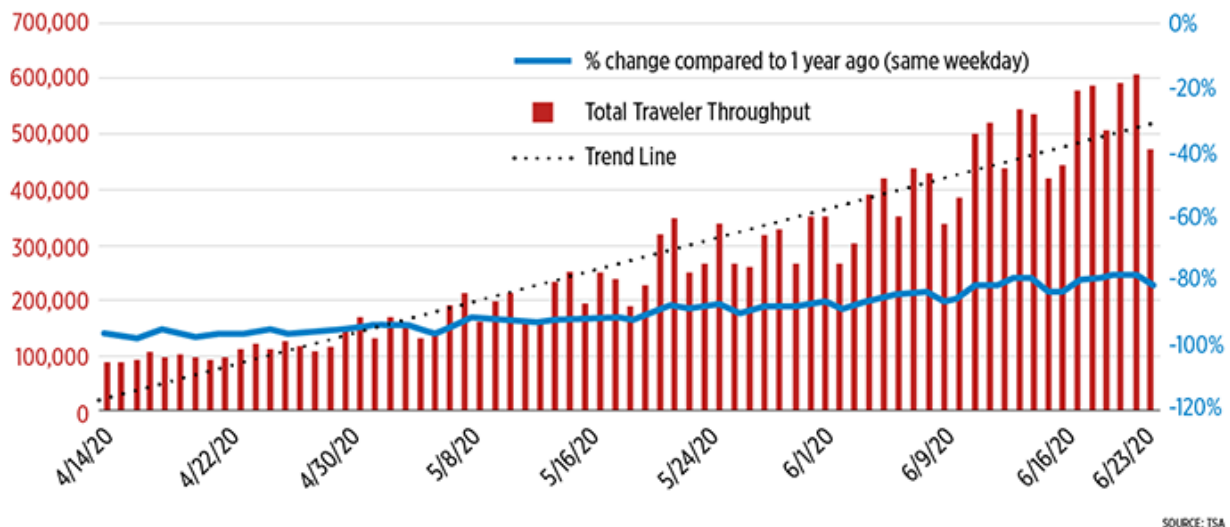
Source: [Arrivalist](#)

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.

- **For the first time since the start of the pandemic, the number of people screened daily by TSA at U.S. airports surpassed 600,000 this past Monday (June 22)**
 - After sinking below 100,000 throughout much of April (-96% year-over-year change), the number of people screened daily by TSA continued to grow steadily, and peaked at 607,540 on Monday
 - Despite the strong growth in passengers in recent weeks, the number of passengers on Monday remained 78% lower than in the same period last year

Number of People Screened at TSA Checkpoints - April 14-June 23, 2020

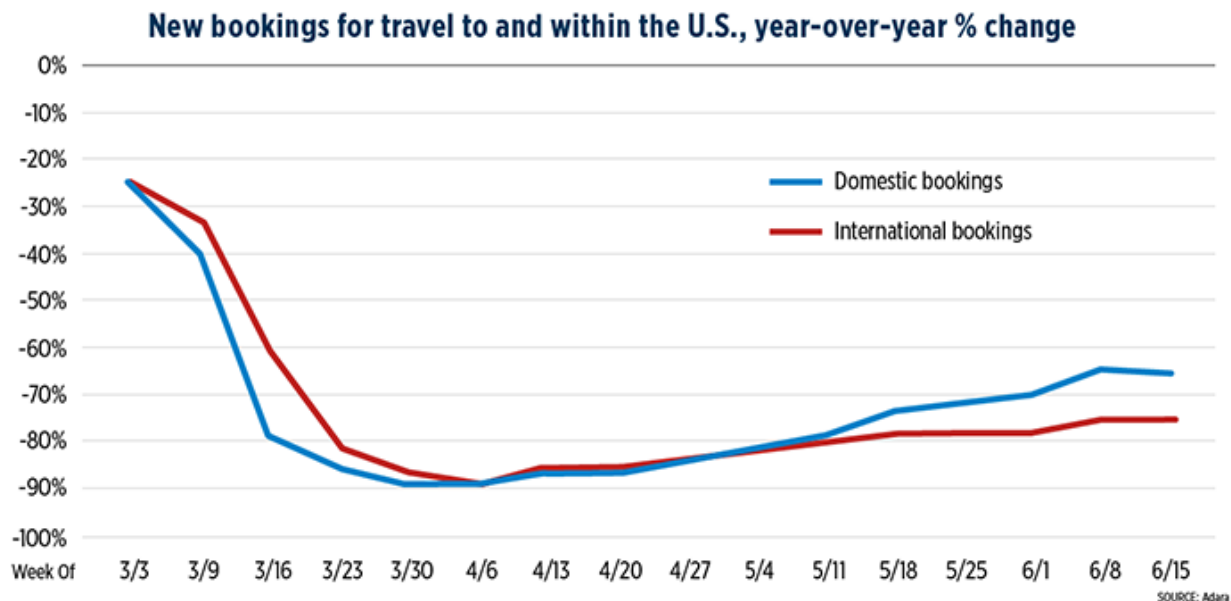


Source: [TSA](#)

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 future business and leisure travel. Updated daily.

- The trend in domestic air and hotel bookings for future travel regressed slightly last week (from -64% to -65% year-over-year) but was still significantly improved from a peak of -89% year-over-year in the week of April 6
 - Domestic bookings to Wyoming (-15%) exhibited, by far, the lowest year-over-year decline as well as a significant improvement from the previous week (-24%). Montana (-27%) and Idaho (-34%) followed
 - Domestic bookings to New York (-81%), Massachusetts (-76%) and New Jersey (-75%) saw the highest declines. Among those three states, New York is the only one in which the year-over-year decline in bookings was higher than the previous week
- International bookings for future travel to the U.S. experienced the same year-over-year decline (-76%) last week as in the previous week



[GO TO TRAVELER TRENDS](#)

Source: [ADARA](#)

NEW | Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, U.S. Travel is offering a new and 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.

[GO TO DASHBOARD](#)

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

Updated | Interactive Travel Analytics

U.S. Travel's [Interactive Travel Analytics](#) database has now been updated to reflect the latest available data and projections. This tool is comprised of five subscriptions, many of which are included in certain U.S. Travel membership levels, that provide statistics on economic impact, visitation and spending, international travel and more. The [Key Statistics and Forecast subscription](#) now reflects data from the most recent U.S. Travel [forecast](#) (released last week). For questions about your login, subscription or to purchase access, please contact [Judith Harris](#).

Source: [U.S. Travel Association](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

June 22, 2020

- **Americans' perceived safety of various travel activities worsened this week, returning to the levels they were three weeks ago, and this has caused some to reverse their travel readiness**
 - **There was a notable increase in pandemic-related trip cancellations for travel in the fall**
- Despite the growing number of cancellations, there are indicators that many cancelled trips will be replaced with other types of trips
 - In fact, a month ago, 25% of American travelers said they would avoid all travel in the six-month period after coronavirus; now just 7% say that
- A perceived lack of appropriate pandemic-etiquette behaviors within their own communities is affecting people's openness to tourists in town
 - 57% of respondents said they do not yet want visitors in their community and only 16% said that they do (the rest were neutral)
 - Those who do not yet want visitors are generally less satisfied with how residents and businesses in their communities are behaving as the economy opens

- Travelers currently say they are most receptive to destination marketing in websites found via search engines and social media

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

June 25, 2020

- 69% of American travelers say they are changing their travel plans because of the coronavirus pandemic
- The number of travelers planning to change upcoming travel plans due to the pandemic has declined from a peak of 85% on April 8, but it is unchanged from two weeks ago at 69%
- Additionally, the percentage of American travelers who say the pandemic will greatly impact their travel plans in the next six months remains unchanged at 46%, while still below the peak of 67% on April 1
- **Travelers are more likely to support tourism businesses which demonstrate a clear, thorough cleaning and hygiene plan (43%), which test staff and the use of PPE by staff (34%), and those that have controls on social distancing at the business (34%)**

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

Back-to-Normal Barometer

June 17, 2020

- Many Americans have started to venture out in the past month: 29% of survey respondents say they ate at a restaurant and 7% say they went on an overnight trip
- The percent of respondents who say they were “ready to go” and would return to various activities without hesitation has fallen considerably since the beginning of June
 - 42% now say they would be ready to stay at a hotel/resort without hesitation, down from 55% on June 3
 - 50% now say they would be ready to visit a theme park without hesitation, down from 60% on June 3
- Of those who answered they were “ready to go,” roughly half stated they would actually do so within the next two months

- Of those who said they were “ready to go but won’t go soon” on an overnight trip within the next two months, the following reasons were mentioned: Health concerns (48%), not a priority to travel (44%), concern about social unrest (33%), economic concerns (29%) and expectation that relevant activities would not yet be open (19%)

Source: [Engagious](#)

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

INTERNATIONAL TRAVEL TRENDS

- Among our 10 top inbound markets, only Brazil, India and Mexico are currently experiencing an acceleration of confirmed COVID-19 cases. The other seven markets have decelerating cases
- Residents of all top inbound markets are significantly less likely to travel internationally in the next 12 months, compared to 2019 (Australia has seen the most improvement in travel intent)
- Among those planning to travel, many are looking for simple, familiar experiences and are not looking to “check all of the boxes;” while they are looking for deals, they would also pay a premium for privacy
- **We are seeing substantial dips (compared to 2019) in terms of intent to visit the U.S. in the next 12 months:**
 - **The strongest dip is from China. Only Japan is actually showing an increase in intent to visit the U.S. and this is due to increased interest in traveling to relatively nearby Hawaii and Guam, which they consider familiar and safe places**
 - **The dip in intent to travel to the U.S. is stronger than to other countries and the U.S. will continue to lose market share**

- Canada will likely be the first market for Brand USA to return to, but it is still too early
- Spring 2021 is the likely timeframe for a steady return to international inbound travel

Source: [Brand USA](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [COVID-19 Travel Risk Tracker](#) | ADARA and DATAVANT
- [2020 Coronavirus Poll](#) | Global Business Travel Association
- [Flight Search Trends](#) | Kayak
- [National Tracking Poll on Travel](#) | Morning Consult, commissioned by American Hotel & Lodging Association
- [COVID-19 Tourism Index](#) | Temple University

UPCOMING INDUSTRY WEBINARS

- **June 26, 10:30 a.m. ET:** [Lessons on Race and Racism: A Continued Discussion](#) | U.S. Travel Association