



This week

We continue to engage members of Congress and staff advocating for the need of a COVID relief package in the lame duck Congressional session. This was [echoed recently](#) by Senate Majority Leader Mitch McConnell and House Speaker Nancy Pelosi. As recently as today on CNN, Senator Durbin, the #2 Democrat in the Senate, also acknowledged the need for a bipartisan approach to getting something accomplished now.

A package cannot wait until January and U.S. Travel and other members in the [COVID RELIEF NOW Coalition](#) will continue to work hard to push forward immediately—and we urge you to get involved. One of our top priorities will be expansion of the Paycheck Protection Program (PPP) to destination marketing organizations, the extension of the PPP to the end of 2021 and a second draw on PPP for the hardest hit businesses— and we need more relief for businesses of all structures and sizes in our industry.

Your activation has never been more important – when we call on you over the next few days, please share with your networks as well. We must keep working together to ensure our voice is big and loud!

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

Let's **GO** There, Together

Join the industry on Monday, November 16 for the official launch of [Let's Go There, Together](#), the latest iteration of the Let's Go There campaign focused on family travel and giving the gift of travel. Participate in the industrywide takeover using resources from the newly released toolkit.

Remember to use #LetsMakePlans in your posts and the new #LetsBookTravel when offering deals to your customers. Together, we will build on the momentum we've started and continue to motivate Americans to think ahead towards future travel, when the time is right for them.

ACCESS THE TOOLKIT

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 declined 11% from the prior week—signaling that the previous week's gain was just a momentary respite**
 - In the week ending November 7, travel spending tallied just \$11.5 billion—its lowest mark since mid-July
 - This reflects a 46% drop below last year's levels (a \$9.9 billion loss), a significant setback from the 42% drop in the prior week
 - Air and hotel travel both recorded their worst year-over-year declines in many weeks
 - The lack of business travel to fill the void in the leisure travel off-season continues to weigh on the travel economy as COVID-19 cases rise across the country
 - While most states experienced declines from the prior week, the Mountain subregion saw an acute drop in travel spending
 - Delaware, Indiana, and Hawaii were the only states this week with substantial gains

- Since the beginning of March, the COVID-19 pandemic has resulted in \$453 billion in cumulative losses for the U.S. travel economy
- The continual depressed level of travel spending has caused a loss of \$58.2 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

The Role of COVID-19 Testing in the Recovery of Travel

Earlier today, our latest Assessing Recovery webinar, “The Role of COVID-19 Testing in the Recovery of Travel,” explored the **role of swift, reliable and available testing** as one of the many factors that recovery is dependent upon alongside improved consumer confidence, enhanced cleanliness standards, widespread practicing of preventative measures, like wearing masks, and the eventual availability of a vaccine.

Dr. Mike Parkinson, U.S. Travel’s chief medical consultant, broke down the different types of tests being used, the reliability of each and what value they may have for the travel industry, while John Flynn, vice president of administration and head of health and safety strategy, MGM Resorts International, shared how testing used on location is essential to rebuilding employee and consumer confidence and restarting meetings and events.

View the recording below for the full webinar, including a panel discussion with Dr. Mike, John Flynn and Tori Emerson Barnes, executive vice president of public affairs and policy for U.S. Travel. [Access the webinar slides here.](#)

FULL RECORDING

We look forward to sharing more recovery experiences and perspectives with you during the next Assessing Recovery webinar. Stay tuned for more information on our December 3 webinar where Adam Sacks, president, Tourism Economics, will walk through the latest travel industry forecast.

Access all recordings on our [Assessing Recovery series webpage](#).

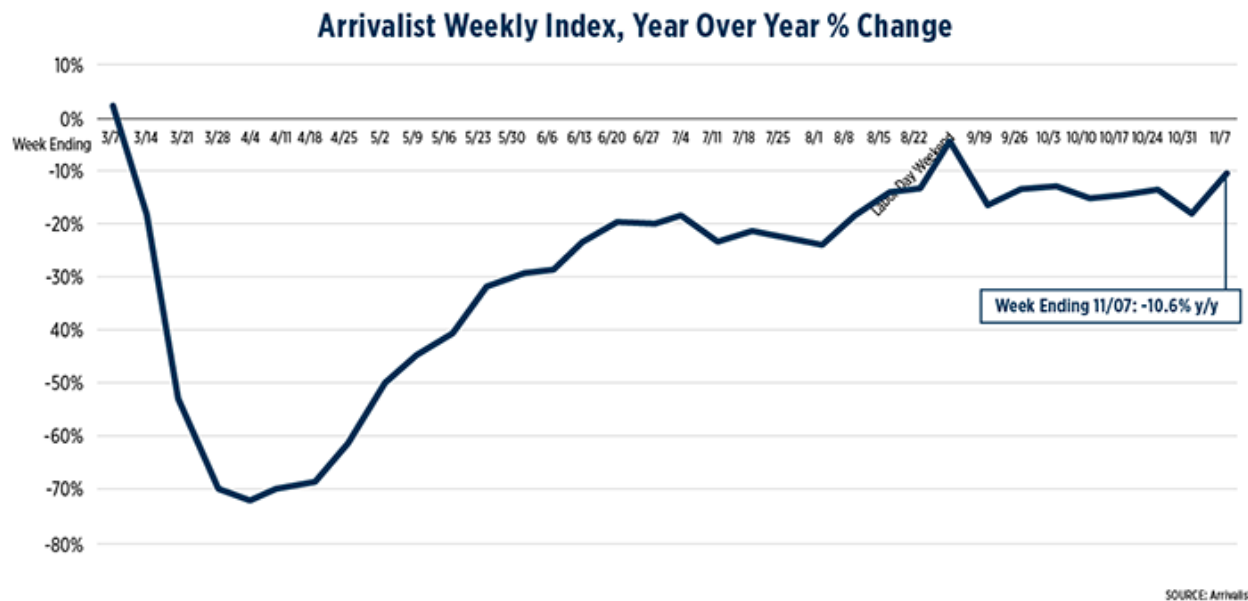
TRACKING TRAVELER TRENDS

The latest travel indicators show a noticeable improvement in road travel, but air travel has declined compared to the same period last year. Domestic and international bookings for future travel remained roughly the same as the previous week.

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 improved last week on a year-over-year (y/y) basis**
 - Road travel was “only” 10.6% down y/y last week, performing better than nearly all weeks since the start of the pandemic



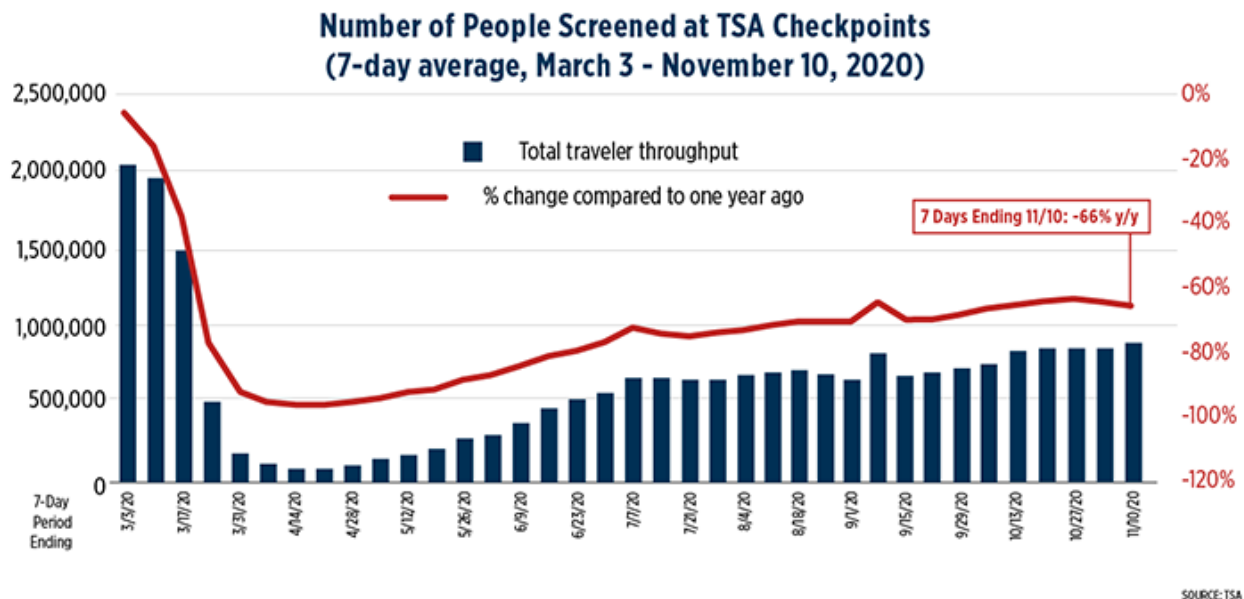
DAILY TRAVEL INDEX

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.

- **Daily TSA screenings edged downward, for the second week in a row**
 - The latest seven-day average of daily screenings (through Tuesday, November 10) was 66% lower than in the same period last year
 - This decline is slightly worse than the 64% y/y decline in the previous week and marks the worst performance in five weeks



Source: [TSA](#)

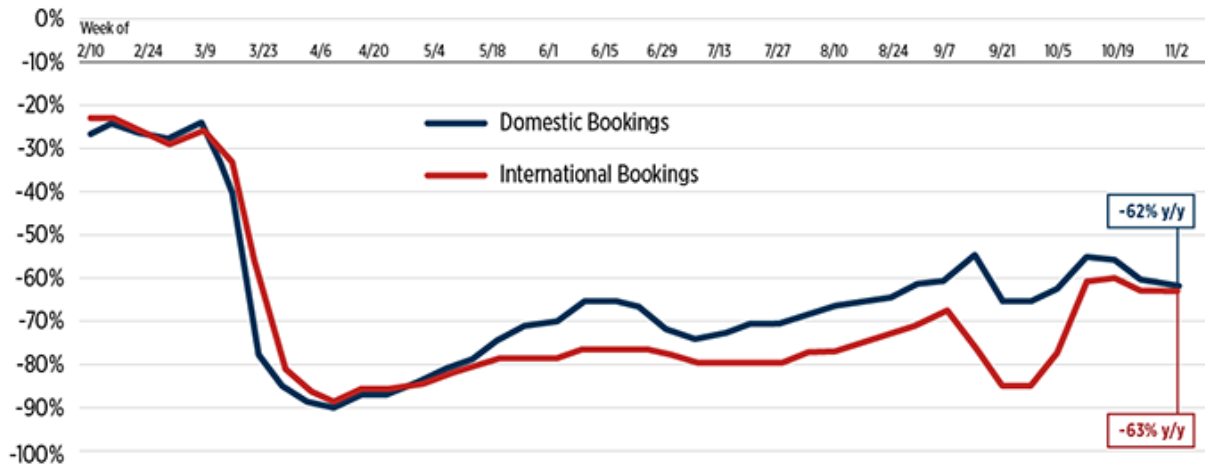
Hotel and Air: Traveler Trends Tracker

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 (-62% y/y) were roughly the same as the previous week**
- **Regional differences remained strong:**
 - Domestic bookings to Montana (-22%), Wyoming (-24%) and Idaho (-33%) experienced the lowest y/y declines, though MT and WY performed significantly worse than in the previous week
 - Domestic bookings to New York (-83%), Massachusetts (-77%) Rhode Island (-75%) and Connecticut (-75%) experienced the highest y/y decline
- International bookings for future travel to the U.S. (-63% y/y) remained the same as in the previous week

Searches and Bookings For Travel To and Within the U.S., Year Over Year % change



SOURCE: ADARA

TRAVELER TRENDS TRACKER

Source: [ADARA](#)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Traveler Intentions Pulse Survey (TIPS)

November 5, 2020

- After increasing each of the previous two months, the percentage of respondents intending to travel for leisure in the next six months fell to 40%, down from 46% in the previous wave
- **The number of respondents who were “not at all likely to travel for leisure in the next six months” rose sharply to 21%, up from 15% in the previous wave**

- Interest in travel by personal car has declined from 70% to 64%, while intent to take a domestic flight dropped from 38% to 32%
- The percentage of those who intend to take a business trip over the next six months has remained somewhat steady (34%) compared to last month (33%)

Source: [MMGY Travel Intelligence](#)

Coronavirus Travel Sentiment Index Report

November 9, 2020

- As the United States continues to set new records in terms of the number of new COVID-19 cases, Americans remain in an elevated state of anxiety and feel that the coronavirus situation will get worse in the next month
 - **Six in 10 say that the recent increases in COVID-19 cases around the country have made them less likely to travel in the next three months**
 - **42% report that they have cancelled or postponed an upcoming leisure trip because of the worsening pandemic**
- While Americans remain in an elevated anxious state of mind, they also appear to be hopeful as the worsening COVID-19 situation did not impact excitement and openness to travel
 - **After worsening for two weeks, the percent of travelers rating the safety of many travel activities as unsafe declined back to pre-pandemic levels**
 - **Excitement for a potential getaway (50%) and openness (46%) to travel inspiration improved, as did the ability of discounts and price cuts to improve interest in travel within the next three months (39%)**
 - The percentage of Americans who say they would be able to fully enjoy travel right now increased five percentage points in the last two weeks (55% to 60%)
 - Nearly six in 10 (58%) Americans have returned to a travel readiness state of mind
- With their desire for travel inspiration returning, 37% of American travelers now say they would be happy to see an ad promoting tourism to the place where they live
 - This exceeds the percent that would be unhappy by over eight percentage points and represents a pandemic-period record high

- When asked how they would advise advertising agencies about the use of masks in travel advertisements, **nearly half said everyone in the ad should wear a mask**

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment November 10, 2020

- Rising COVID-19 cases throughout the country is taking a toll on travel plans: **Less than six in 10 (58%) of all travelers now have travel plans in the next six months, the lowest percentage since the beginning of the pandemic in early March**
- As we near the holiday season, fewer American travelers plan to take a trip during the holidays
 - 53% are not planning any travel during the holiday season, up from 48% a month ago
 - Over Thanksgiving, 23% are planning to travel by car and 5% are planning to travel by air
 - For the December holidays, 38% are planning to travel by car, while 17% will fly

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

Fewer Americans Hitting the Road this Thanksgiving November 12, 2020

- **50 million Americans are expected to travel this Thanksgiving—a 10% drop from 2019 and the largest one-year decrease since the Great Recession in 2008**
 - Those who decide to travel are likely to drive shorter distances and reduce the number of days they are away, making road trips the dominant form of travel this Thanksgiving
 - Travel by automobile is projected to fall 4.3%, to 47.8 million travelers while air travel volume will be down by nearly half of prior years—to 2.4 million travelers—the largest one-year decrease on record

- However, as the holiday approaches and Americans monitor the public health landscape, including rising COVID-19 positive case numbers, renewed quarantine restrictions and the Centers for Disease Control and Prevention's (CDC) travel health notices, it is likely that the actual number of holiday travelers will be even lower

Source: [AAA](#)

iMeet Survey of Meeting Planners

November 8, 2020

- For the second week in a row, the percentage of planners with a request for proposal in progress declined to 43%, down from 45%, while the percent of planners with at least one future face-to-face meeting booked or contracted held steady at 70%
- **Three-quarters (74%) of meeting planners anticipate they will resume face-to-face meetings sometime in 2021, with half not planning on meeting until Q2 (25%) or Q3 (26%)**
- Uncertainty about when to resume face-to-face events increased to 18% this week—up from 16%

Source: [iMeet](#)

The Harris Poll CV-19 Tracker

November 5-11, 2020

- Many Americans (69%) have developed a renewed appreciation for the outdoors since the start of the pandemic
 - Looking ahead, 42% plan to stay more physically active even after things get better
- **While Americans are anxious heading into Thanksgiving this year, the longing for connection is at an all-time high**
 - **71% miss gathering with friends and family, and more feel thankful (65%) than angry (48%)**
- With COVID-19 cases spiking across the nation, many Americans are opting to celebrate Thanksgiving in smaller groups than in traditional large gatherings

- **Nearly four in 10 (37%) will be celebrating Thanksgiving at home with their immediate family while less than a fifth (16%) will be celebrating with extended family**

Source: Harris Poll ([11/5](#)), ([11/11](#))

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Will Airline Hubs Recover From COVID-19](#) | McKinsey and Company
- [Recovery Scenarios and Economic Impact from COVID-19](#) | World Travel and Tourism Council
- [Accelerating Travel Innovation After Coronavirus](#) | Euromonitor International
- [Travel This Holiday Season](#) | Ipsos
- [Mental Wellness a \\$121 Billion Market](#) | Global Wellness Institute

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **November 13 at 12:00 p.m. ET** | [Post-Election, Post Vaccine Travel Outlook](#) | Skift
- **November 13 at 1:00 p.m. ET** | [Passenger Confidence Amid COVID-19: Seeing is Believing](#) | Airports Council International
- **November 13 at 2:00 p.m. ET** | [Group Business Insights, November 2020](#) | Cvent
- **November 17 at 12:00 p.m. ET** | [Now That the Votes Are In](#) | Kantar
- **November 19 at 3:00 p.m. ET** | [Path Forward with CDC Director Robert Redfield](#) | U.S. Chamber of Commerce
- **December 1 at 8:00 a.m. ET** | [One Voice: to Recovery and Beyond Virtual Event](#) | World Travel and Tourism Council

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](#).