



This week

The bicameral bipartisan group who introduced the “Emergency COVID Relief Act of 2020” [released a summary](#) yesterday providing more details from the bill. The bill contains many key provisions that U.S. Travel has fought hard to secure, including:

- **\$300 billion for small businesses**, including the Paycheck Protection Program (PPP), 7(a) loan program and Economic Insurance Disaster Loans
 - The second round of PPP **provides PPP loans, with loan forgiveness, for small businesses** with fewer than 300 employees AND a 30% revenue loss in any quarter of 2020
 - The bill also **expands eligibility for destination marketing organizations (DMOs)** with fewer than 150 full-time and part-time employees to receive a first PPP loan
- **\$160 billion in funding for state, local and tribal governments**, which is similar to the Coronavirus Relief Fund under the CARES Act
- **Funding for airports**, including set asides for airport concessionaires
- **\$2.5 billion for vaccine distribution** by the Centers of Disease Control and Prevention and **\$10 billion for testing and contact tracing**

However, there is much uncertainty if this bill can move forward. Ultimately, Speaker Pelosi and Leader McConnell must agree on a path forward.

Yesterday, the U.S. House of Representatives passed a [continuing resolution](#) (CR) that should keep the government open and operating through Dec. 18. Republican and Democrat members of Congress aim to attach the COVID-19 relief package to the year-end spending bill if a deal can materialize. However, the future of the CR in the Senate is unclear as

Senator Rand Paul (R-KY) has objections and has been filibustering. The CR must pass Congress and be signed by President Trump before midnight tomorrow or the government will shut down.

ADVOCACY AND GRASSROOTS AHEAD

Thank you for engaging last week in our **Activation Blitz!** All week, we put the pressure on Congress and the action alerts, targeted social media and phone calls to your representatives made a big impact.

While the work on this legislation is a step forward, negotiations are continuing. We will be reaching out in the coming days with a new activation—please stay prepared to engage. In the meantime, consider using our [social media guide](#) to continue to reach out to your members of Congress on social media and include the hashtag **#SaveTravel** in all posts.

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

Let's **GO** There, Together

Travel brands and businesses continue to emphasize family travel and giving the gift of future travel through the Let's Go There, Together campaign. View the recap book to experience how organizations are getting involved and be sure to [submit how you are participating](#) for a chance to be featured in future compilations.

VIEW RECAP

The campaign will continue throughout the rest of the month, including a second [homepage takeover](#) on Tuesday, Dec. 15. An [editorial calendar](#) is available to help you plan your involvement. We encourage everyone to get involved.

It remains critical we continue to communicate what the industry is doing, as well as emphasizing the shared responsibility we all have to help ensure a health and safe travel experience. Use our [Travel Confidently toolkit](#) to help spread these messages.

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 contracted 16% last week, proving the prior week's boost to only be a momentary respite from a post-summer downward trajectory**
 - In the week ending December 5, travel spending tallied just \$10.9 billion—its lowest level since the week ending June 20—and reflected a 48% drop below last year's levels (a \$10 billion loss)
 - The 48% year-over-year (y/y) drop was significantly worse than the 39% y/y drop in the previous week, and marked the worst y/y decline since the end of July
 - The steep declines in the week ending December 5th were widely felt, as Vermont, Maine and New Mexico were the only states to experience an improvement from the prior week
 - **November concluded with \$40.2 billion of travel spending losses—a 44% y/y decline**
 - New records in confirmed COVID-19 cases and the re-enactment of policies restricting travel could lead to further declines through the winter travel season
 - **Since the beginning of March, the COVID-19 pandemic has resulted in \$491 billion in cumulative losses for the U.S. travel economy**
 - The continual depressed level of travel spending has caused a loss of \$63.1 billion in federal, state, and local tax revenue since March 1

FULL REPORT

TRAVEL EMPLOYMENT UPDATE

- **The travel-dependent Leisure & Hospitality sector is suffering from a 15% unemployment rate—nearly double the national level—[according to the latest unemployment figures](#)**
 - Leisure & Hospitality accounted for 11% of all pre-pandemic employment in the U.S. yet has suffered 35% of all pandemic-related job losses
 - The Leisure & Hospitality industry resurged in September with 413,000 new jobs, but declined precipitously over the past three months, adding only 31,000 jobs in November

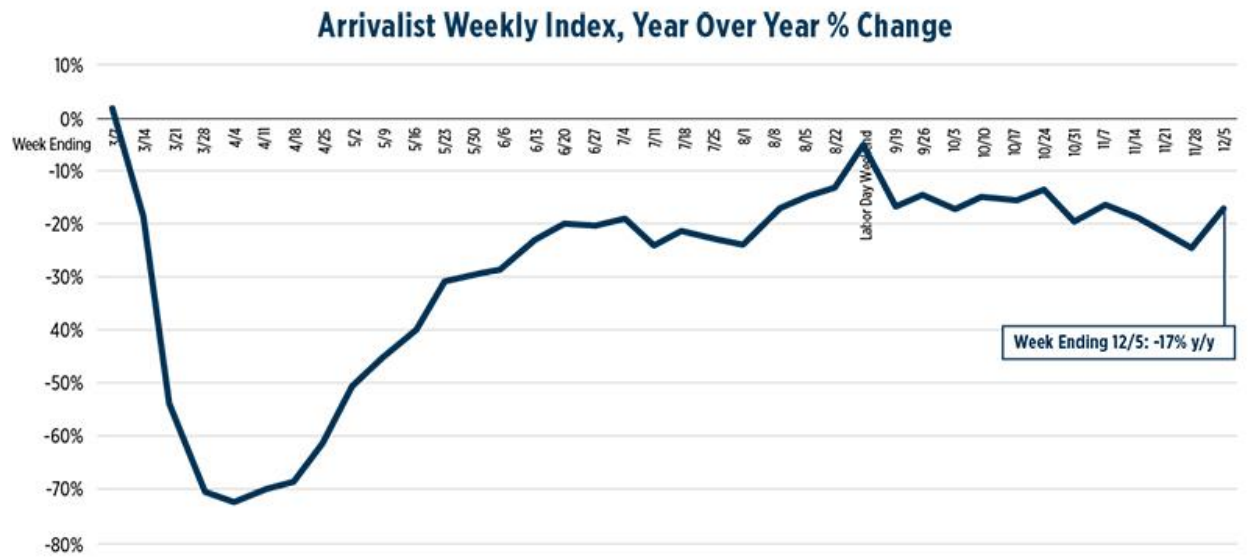
Source: [Tourism Economics](#)

TRACKING TRAVELER TRENDS

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 last week (seven-days ending December 5) was 17% lower than the same period last year**—slightly better than the y/y decline over Thanksgiving and in line with trends seen throughout the fall



SOURCE: Arrivalist

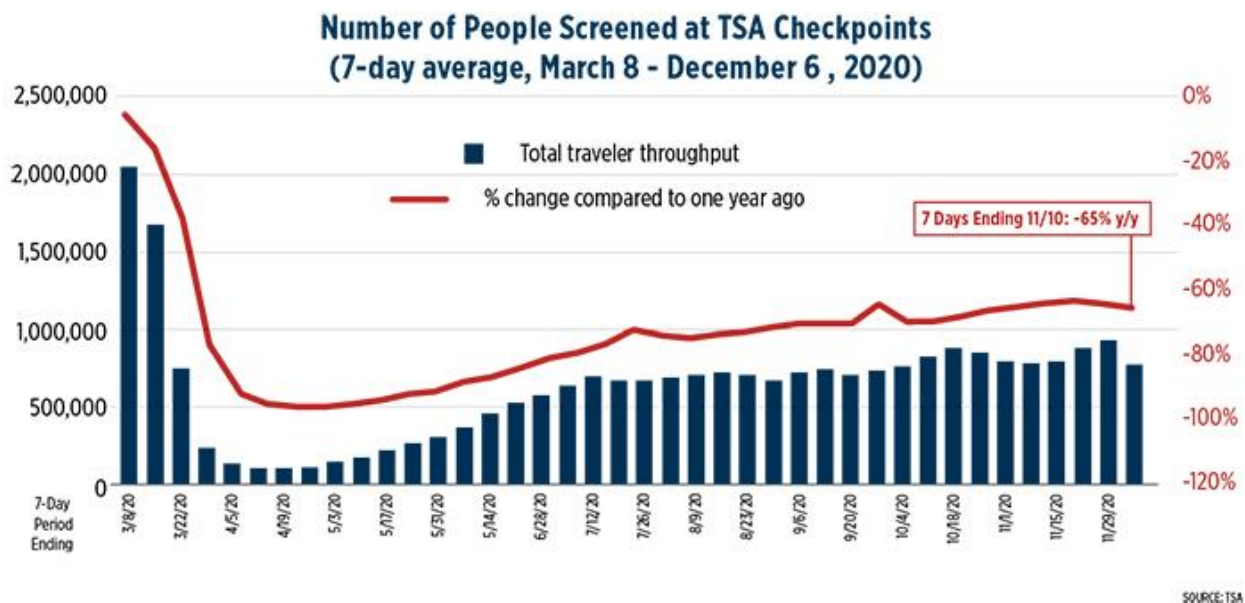
DAILY TRAVEL INDEX

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.

- **After reaching new pandemic highs and the lowest year-over-year declines around Thanksgiving, TSA screenings declined considerably last week**
 - The seven-day average last week (through Sunday December 6) was 765,000, 17% lower than the previous week
 - TSA screenings declined not only in terms of volume (as can be expected in the week after Thanksgiving) but also in terms of y/y rates, falling from -61% y/y to -65% y/y
 - Screenings *this* week (through Tuesday) are performing even worse
 - This past Tuesday's screenings of just 502,000 passengers was the lowest of any day since July 4 and the y/y decline of 74% on Tuesday was the worst in three months



Source: [TSA](#)

Lodging: Hotel Occupancy

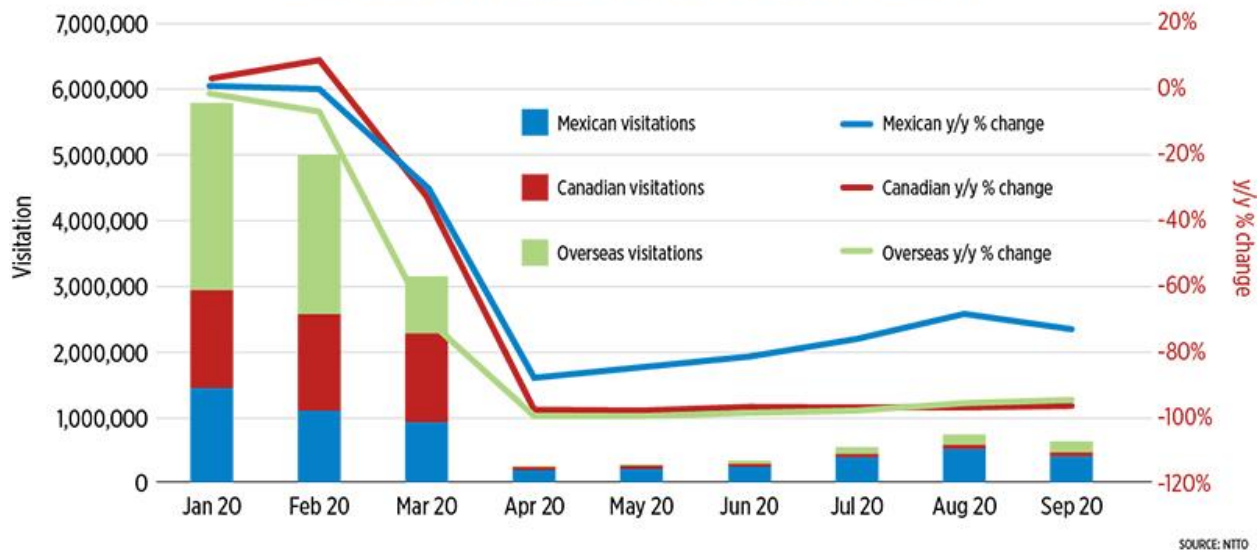
- **Total hotel occupancy in the U.S. was 37% last week, compared to 60% in the same period last year**
 - Luxury hotels suffered the most: 19% occupancy compared to 75% in the same period last year
 - Economy hotels, on the other hand, were nearly as occupied as they were last year: 47% compared to 51%

Source: [STR](#)

International Arrival Trends

- **Overseas visitations in October 2020 remained 93% below October 2019 levels (just slightly improved from -95% y/y in September)**
 - While visitation levels have been improving each month from nearly -100% in April, the pace of improvement has been very slight
 - Visitations from Canada were down 97% y/y in September (latest available), the same as in June-August, while visitations from Mexico were down 74%

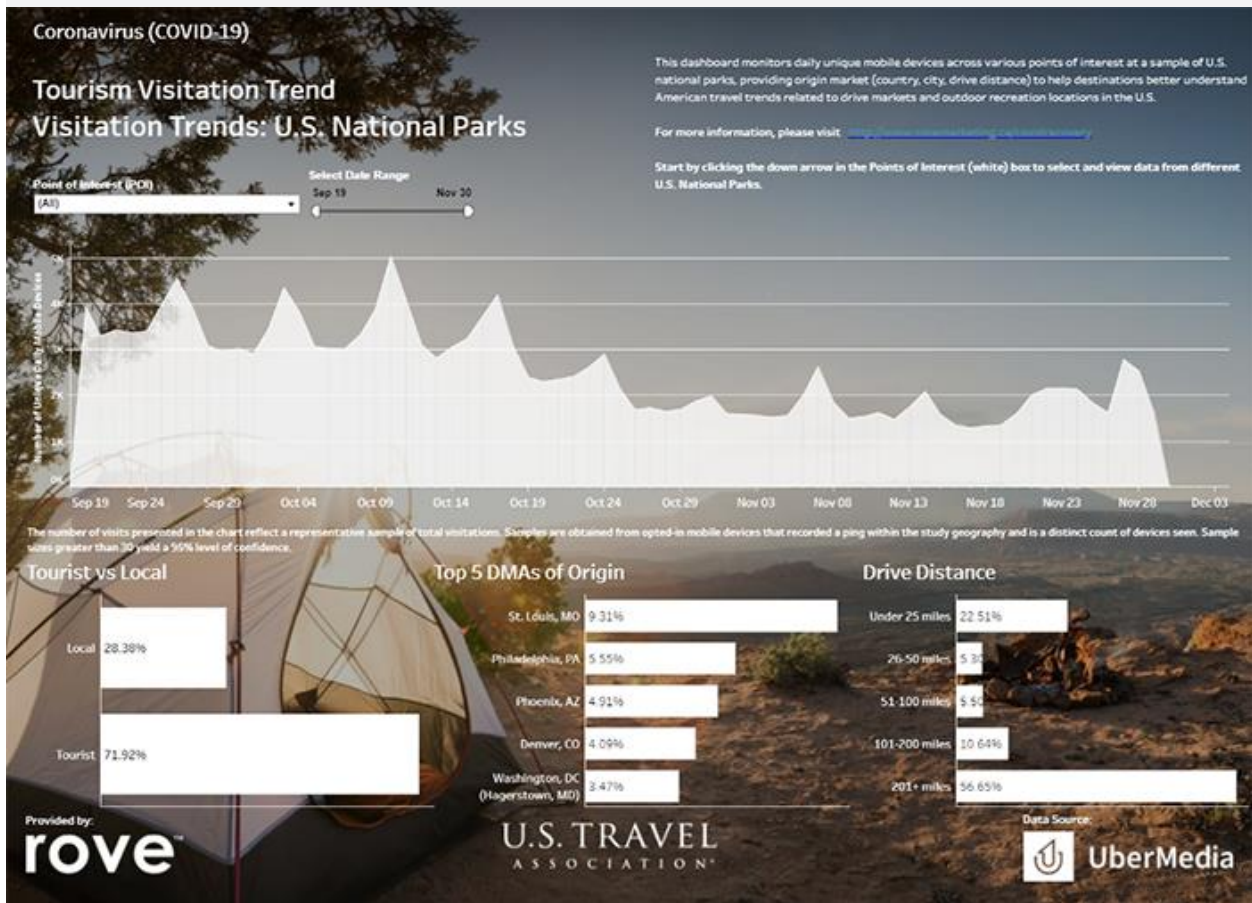
International Visitations to the U.S. in 2020 (monthly)



Source: [National Travel and Tourism Office](#)

Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, U.S. Travel's [exclusive dashboard](#) monitors daily unique mobile devices across various points of interest at sample U.S. national parks.



NATIONAL PARKS DASHBOARD

Be on the lookout for a NEW dashboard featuring ski destinations across the U.S. in the new year. The updated dashboard is designed to help monitor recovery. It will include 2021 season data for over 20 ski destinations and feature the number of unique mobile devices at each point of interest, distance traveled, origin markets and traveler vs local distinctions.

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Traveler Intentions Pulse Survey (TIPS)

December 7, 2020

- **The percentage of respondents likely to take a domestic leisure trip during the next six months remained steady (41%) after the six-point decline observed between September and October**
- The percentage of respondents likely to take a domestic business trip during the next six months increased to 38% from 34% in October
 - One in five (20%) of business travelers are likely to attend a conference or convention, up from 17% last month and one in four are likely to attend a business meeting
- Travel by car remains the most preferred form of transportation for respondents: One in five (20%) are willing to drive more than 500 miles for a leisure trip
- The percentage of respondents likely to travel by personal car during the next six months rose to 67% following a two-month decline

Source: [MMGY Travel Intelligence](#)

Coronavirus Travel Sentiment Index Report

December 7, 2020

- Americans largely see the last month of 2020 as one in which the pandemic situation is going to worsen—63% expect the pandemic to get worse in the next month
- The perception that travel activities are generally safe has declined during the current state of the pandemic (53% to 46%)
- Yet, Americans are still demonstrating openness to travel messaging
 - Excitement to travel in the next month increased from 45% to 49%
 - The proportion excited to learn about new, exciting travel experiences or destinations to visit improved from 41% to 44%
- **Americans' current sentiment is having some negative impact on marketability for travel**

- **Only 52% say they are in a travel readiness state of mind, down from 56% last week**
- **And those that can be motivated by discounts and price cuts to travel in the near-term dropped to 36% after hitting 40% two weeks ago**
- After not being able to see and connect in person with our family and friends for much of 2020, **spending time with loved ones (63%) is by far the top priority for traveling in 2021** followed by getting away from crowds (52%)
 - As a result, beach (37%) and outdoor recreation (e.g. National Parks (31%), mountain resorts (30%)) destinations will top the list of where travelers are most excited about and feel most safe visiting in 2021
- **As remote work and school will likely continue at least in some hybrid form, well over a third (36%) of Americans whose job allows them to telecommute say they are likely to take a “workcation” in 2021**
 - Meanwhile, 29% of Americans who travel with school-aged children say they are likely to take a “schoolcation”

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

December 8, 2020

- **As the coronavirus continues to surge, 15% of American travelers have cancelled their holiday travel plans in just the past two weeks and nearly half (46%) have no plans to travel**
- Four in 10 (41%) of travelers indicated that they do not plan to travel until a vaccine is available, down slightly from 44% two weeks ago
- Despite a vaccine being imminent, 74% of American travelers still expect to change their travel plans in some way due to COVID-19 within the next six months
- Still, 62% of travelers indicate they have travel plans within the next six months, holding steady from two weeks ago

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

The Harris Poll CV-19 Tracker

December 4, 2020

- **Americans are evenly split on whether they will wait to see the impact of Thanksgiving travel on COVID-19 cases before making plans for the winter holidays (51%)**
- Two-thirds of Americans say they are less likely to have an in-person gathering for the upcoming winter holidays if COVID-19 cases rise as a result of Thanksgiving, with seniors (73%) and boomers (69%) being more cautious than Gen Xers (57%)

Source: [Harris Poll](#)

Thanksgiving Travel

December 9, 2020

- **Nearly one-quarter (22%) of Americans were not at their place of residence on November 26 according to mobile phone location data**
 - Approximately one in eight individuals traveled more than 30 miles away from home
- Americans who live in the West and Northeast were more likely to be away from home, while many parts of the South saw a relatively larger number of non-locals on Thanksgiving Day

Source: [Bloomberg](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- ['Tis the Season for Gift Cards, Offers and Quarantine Pods](#) | AmEx TrendEx
- [COVID-19 Indoor Safety Guideline](#) | Massachusetts Institute for Technology
- [The Journey Ahead: How the Pandemic and Technology Will Change Airline Business Travel](#) | IdeaWorks Company and Car Trawler
- [Americans Willingness to Receive COVID-19 Vaccine](#) | Gallup Poll

UPCOMING INDUSTRY WEBINARS

- **Ongoing** | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- **December 11 at 2:00 p.m. ET** | [Group Business Insights](#) | Cvent and STR
- **December 14 at 12:00 p.m. ET** | [The Future of Association In-Person Meetings](#) | Association Forum and Meetings Mean Business Coalition
- **December 16 at 4:00 p.m. ET** | [Travel and Tourism in 2021: The Road to Recovery](#) | Oxford Economics
- **December 17 at 11:00 a.m. ET** | [The State of Global Affairs Beyond COVID-19](#) | BTN Content Solutions
- **December 17 at 12:00 p.m. ET** | [Hospitality Now: What's Next in Global Travel](#) | Forbes Travel Guide
- **December 18 at 12:00 p.m. ET** | [WEC Grapevine: How We Did It – Pandemic Meetings Considerations & Lessons Learned](#) | Meeting Professionals International

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](#).