



This week

- Last Thursday, Senators Gardner (R-CO), Bennet (D-CO), Romney (R-UT) and Sinema (D-AZ) introduced the [TEST Act](#), a bill that would modernize COVID-19 detection measures, improve testing and strengthen the nation's public health preparedness efforts—one of U.S. Travel's top priorities since the crisis began.
- The deadline for businesses to apply for a loan through the Paycheck Protection Program has been extended to August 8.
- The Main Street Lending Program is now fully open for loan processing. The Federal Reserve Bank of Boston also announced their intention to publish a state-by-state list of registered lenders that are accepting new customers under the program.

Resources

- Updated [CARES Act Relief Resources](#)
 - [Exchange Stabilization Fund](#)
 - [Paycheck Protection Program](#)
 - [FAQ](#)
- [Travel Confidently \(A shared responsibility.\) Industry Toolkit](#), which now includes a new [social media guide](#) and graphics focusing on the importance of all travelers following preventative measures, including wearing a mask, no matter where they are in the U.S.

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 17% to \$13.2 billion last week, as the July Fourth holiday weekend provided the largest increase since Memorial Day. This expansion has seen travel spending increase over fivefold from its bottom at the end of April**
 - In the week ending July 4, the travel economy witnessed its tenth-consecutive week of expansion since the start of the pandemic but still registered 44% below last year's levels (a \$10.3 billion loss)
 - Each segment contributed to this growth, with air travel up 22% and car trips up 10% from the prior week
 - More than half of the country is now posting weekly losses of less than 40% as 31 states have now reached that milestone; Rhode Island, Michigan and Nebraska saw the strongest improvements
 - States with mounting COVID-19 cases, including Florida and South Carolina, recorded only lukewarm gains
 - The District of Columbia and Hawaii continued to suffer declines exceeding 70%; Hawaii has struggled to recover due to heavy reliance on air travel
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$273 billion in cumulative losses for the U.S. travel economy
 - The continual depressed level of travel spending has caused a loss of \$34.9 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

[Leveraging the Latest Trends in Outdoor Recreation](#)

The webinar today focused on trends and insights related to outdoor recreation as reopening continues in several states and included an overview from the Department of Interior on implementing health and safety protocols as well as a dive into a fascinating new tracker from Rove Marketing that explores where visitors to several national parks are coming from, how they are getting there and more. [Access the full deck here.](#)

Featured speakers:

- Margaret Everson, principle deputy director, U.S. Fish & Wildlife Service, U.S. Department of the Interior
- Lindsey Norment, brand director, Virginia Tourism Corporation
- James Sauter, partner and co-founder, Rove Marketing

Webinar resources:

- [National Parks Dashboard](#)

FULL RECORDING

The Effect of Rising COVID-19 Cases on Consumer Confidence

July 16, 2020 | 12:00-1:00 p.m. ET

Join us next Thursday from 12:00-1:00 p.m. ET for a deep dive into how a resurgence of coronavirus cases in certain parts of the U.S. is affecting a myriad of American behaviors that may have implications for our industry.

Featured speaker:

- Mike Dabadie, managing partner, CEO, Heart+Mind Strategies

REGISTER NOW

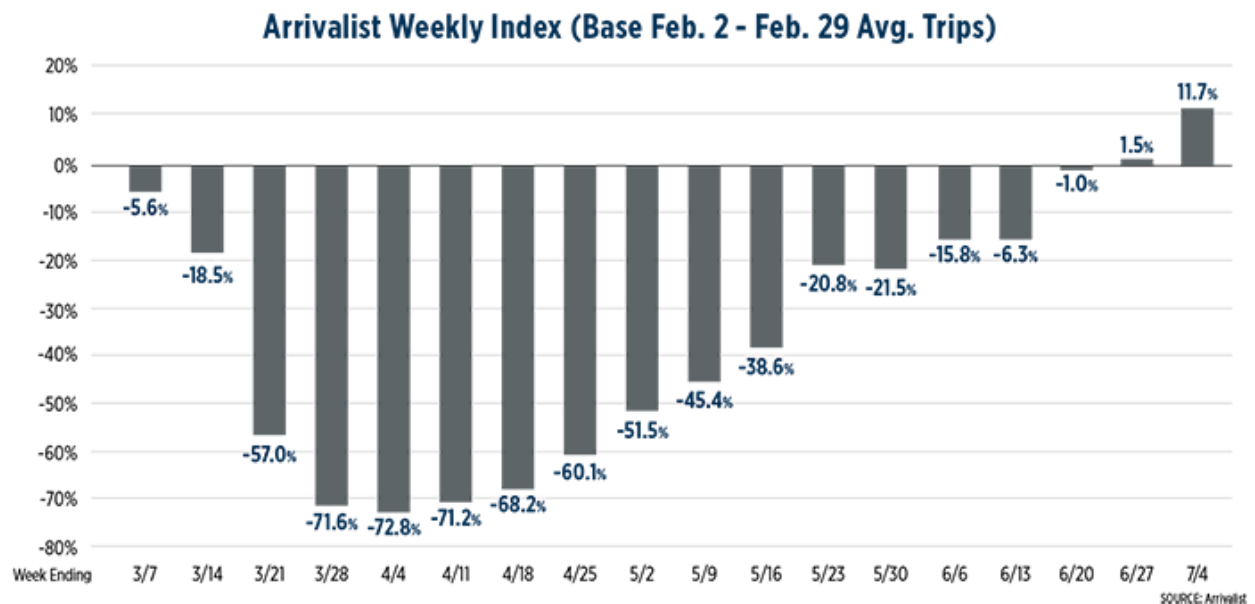
Access all Assessing Recovery webinar recordings at ustravel.org/assessing-recovery

TRACKING TRAVELER TRENDS

Car: Daily Travel Index

Arrivalist's [Daily Travel Index](#) measures consumer road trips of 50 miles or more in all 50 U.S. states.

- **The July Fourth holiday saw a complete return to pre-pandemic levels of road travel, and it was only slightly lower than the holiday last year**
 - Road travel last week was 12% higher than it was right before the crisis (Feb. 2020), the first time since the start of the pandemic (in comparison it was 73% lower than pre-pandemic levels in the first week of April)
 - Of note, road travel over the Fourth of July holiday was down only 9% compared to the same holiday period in 2019



GO TO DAILY TRAVEL
INDEX

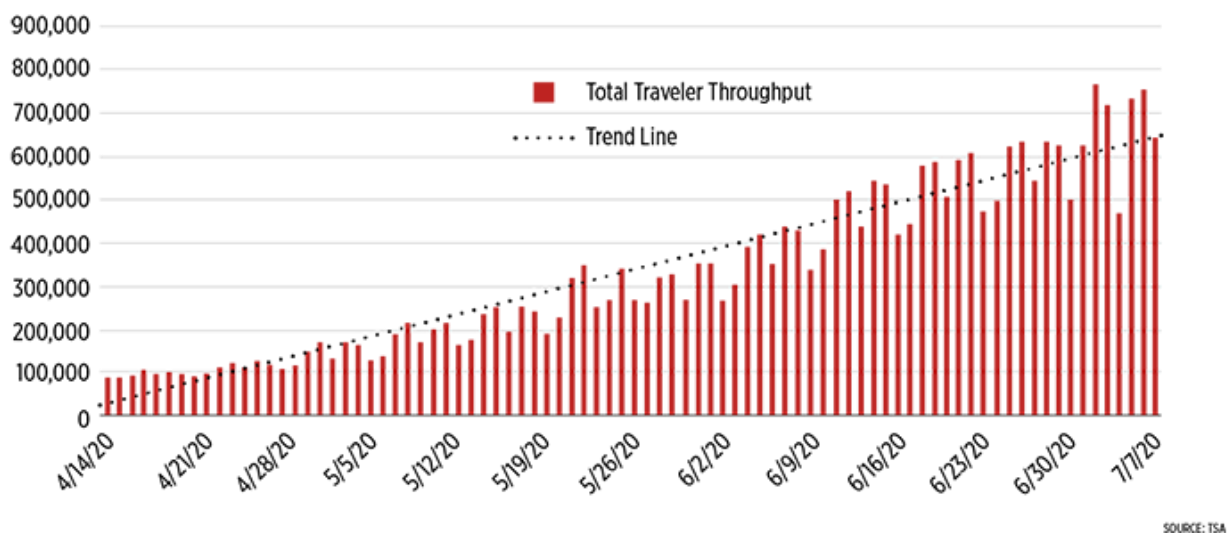
Source: [Arrivalist](#)

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.

- **The July Fourth holiday saw a significant jump in the number of people screened by TSA, which surpassed 750,000 for the first time in over three months**
 - After sinking below 100,000 throughout much of April (-96% year-over-year change), the number of people screened daily by TSA at U.S. airports grew rapidly over the past few weeks, and peaked at 764,000 last Thursday, in advance of the July Fourth holiday weekend
- On a year-over-year basis, TSA screenings in the seven days surrounding July Fourth this year were still 73% lower than in a similar period last year

Number of People Screened at TSA Checkpoints - April 14-July 7, 2020



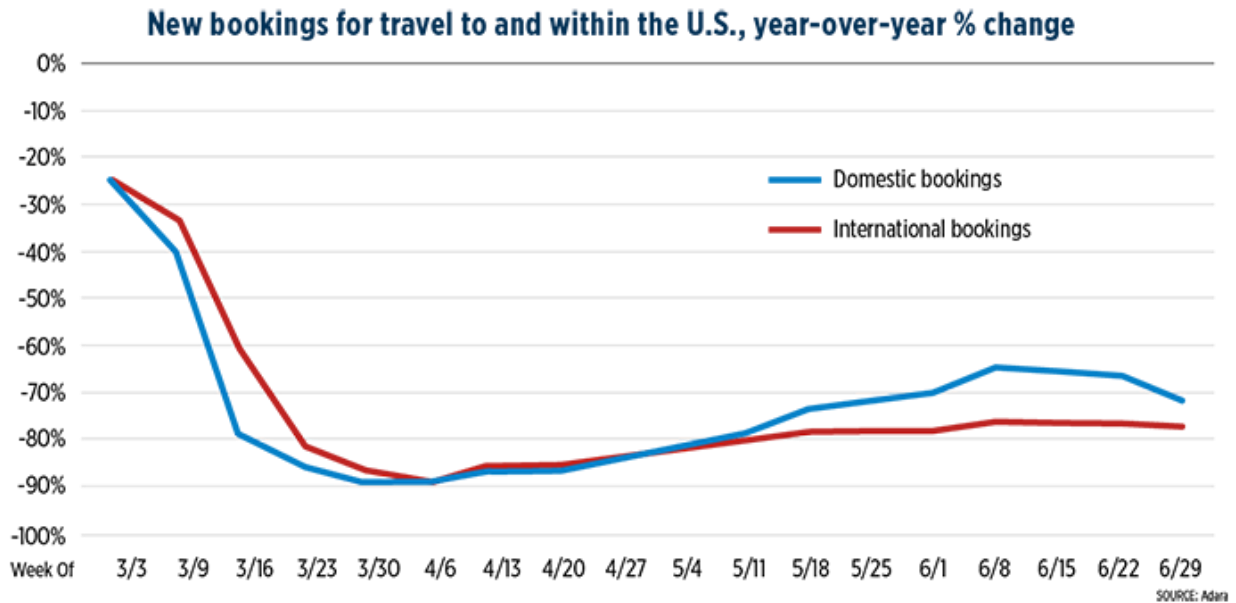
Source: [TSA](#)

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 business and leisure travel. Updated daily.

- **After regressing slightly in the past two weeks, the trend in domestic air and hotel bookings for future travel regressed more considerably last week (from -66% to -71% 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 (-22%) exhibited, by far, the lowest year-over-year decline, though they still regressed from two weeks earlier (-15%). Montana (-26%) and Idaho (-40%) followed
- Domestic bookings to New York (-83%), Massachusetts (-79%) and New Jersey (-76%) saw the highest declines, and all performed worse than two weeks earlier
- International bookings for future travel to the U.S. experienced nearly the same year-over-year decline (-77%) last week as in the previous weeks



[GO TO TRAVELER TRENDS](#)

Source: [ADARA](#)

Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and UberMedia, U.S. Travel is offering an 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 UberMedia](#)

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 membership](#).

GO TO INTERACTIVE
TRAVEL ANALYTICS

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

July 6, 2020

- As record numbers of cases continue to be reported throughout the United States, 63% of travelers feel the situation is going to get worse in the next month—up dramatically from 35% at the beginning of June
- **There was a significant increase in the percent of Americans who said there are certain destinations they would normally consider visiting but now will absolutely not due to the coronavirus situation—37.3%, up from 29.6% in just**

one week. When asked what's driving the avoidance of these destinations, they selected the following:

- **Rising coronavirus cases (47%); the perceived unsatisfactory management of the situation by the destination (39%); worry that other visitors would not practice social distancing (30%); negative media coverage of COVID-19 problems in the destination (29%); and worry that other visitors would not wear masks (27%)**
- **Travelers were also worried that some attractions would be closed (23%) and that residents would not social distance or wear masks (23%)**
- Nevertheless, the percent of respondents who traveled over the Fourth of July holiday (16.5%) was more than double the percentage of those who traveled for Memorial Day (5.9%)
- Among respondents, a greater percentage of males traveled than females (20% vs. 14%), and a greater percentage of "Millennial or younger" than other groups (24% vs. 15% for Gen X and 10% for Boomer or older)

Source: [Destination Analysts](#)

National Tracking Poll: COVID-19 and Travel Sentiment

July 8, 2020

- **After many weeks of improving travel sentiment, the recent spikes of new COVID-19 cases in many states are definitely having a negative impact:**
 - **76% of travelers now report changing plans (up from 69% two weeks ago)**
 - **Only 41% of travelers now feel safe traveling outside their community (down from 46% two weeks ago)**
 - **Only 34% of travelers now support opening their community to visitors (down from 41% two weeks ago)**
- On the positive side, concern about the economy greatly impacting travel plans is still low at around 20%
- Regional drive travel for visiting friends and relatives, followed by leisure travel, still dominate near-term travel plans

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

The Harris Poll CV-19 Tracker

June 26-29, 2020

- Nearly a third (29%) of Americans say they will travel in the next 4 months
- Around two-thirds of Americans (67%) say that because of COVID-19, they'll probably be taking more road trips this year to avoid airline travel
- **Americans say that hotels are safer than Airbnb:**
 - **More than 3 in 5 Americans (65%) say that in terms of sanitation practices, they think that staying at a hotel is a safer option than staying at an Airbnb or other vacation rental**
 - **Americans indicate they are more comfortable at a hotel (55%) than at an Airbnb or other vacation rentals (42%)**
 - **Most Americans agree that "Hotels have implemented enough new cleaning procedures to protect against the virus" (61%) and that "Hotels have done enough to reassure me that staying at a hotel will be safe" (60%)**

Source: [The Harris Poll](#)

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
- [Coronavirus Index](#) | Axios-Ipsos
- [The State of the Esports Industry Study](#) | Esports Business Research Group
- [Life Under Coronavirus \(SAMPLE\)](#) | Foresight Factory
- [Recovery Index](#) | Foursquare
- [The Future of Travel – Carnival CEO](#) (Webinar recording) | The Points Guy

- [COVID-19 Travel and Tourism Research](#) | Travel and Tourism Research Association
- [Perceptions of Risk Travel Survey](#) | University of Florida, Tourism Crisis Analysis Initiative

UPCOMING INDUSTRY WEBINARS

- **July 16 at 10:00 a.m. ET:** [Life Beyond COVID-19. How Have Your Consumers' Expectations Changed?](#) | Foresight Factory
- **July 21 at 2:00 p.m. ET:** [COVID-19 Research Update](#) | Brand USA

QUESTIONS?

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

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](#).