



This week

On Monday, Senate Republicans [released](#) their draft coronavirus relief legislation, referred to as the HEALS Act, that includes several travel-related provisions that U.S. Travel and the industry fought hard to secure:

- Improves the Paycheck Protection Program (PPP), including expanding PPP eligibility to all destination marketing organizations (DMO), any 501(c) nonprofit, quasi-governmental organization or political subdivision of state or local government (including instrumentalities) with 300 employees or less. Learn more about [loan provisions here](#), among others.
- Protects businesses from lawsuits related to COVID-19 if they follow proper health and safety guidelines.
- Provides tax relief through various tax credits and deductions. More on the bill's [tax provisions here](#).
- Supports improvements in testing and reporting practices and boosts our national contact tracing abilities. More on the bill's [testing and vaccine provisions here](#).
- Provides additional flexibility for the \$150 billion previously allocated through the Coronavirus Relief Fund (CRF), including extending the deadline for states and eligible local governments to use the funds by a year to December 2021.
- Provides \$10 billion in additional relief for U.S. airports.

Grassroots Activation

With the release of the HEALS Act, Congress has begun negotiations for the next round of coronavirus relief. However, the discussions have currently hit a difficult point and we are hopeful that further talks will resume early next week. While we have secured measures that provide both relief and protection in both the HEALS and HEROES Acts, much more **work is**

needed and we must keep the momentum going. We urge you to begin reaching out to your members of Congress and Senators now and urge that they come to an agreement and pass meaningful legislation this coming week.

If you are a DMO, work with a DMO or want to continue to support the travel industry, there are a few actions you can take right now to encourage the Senate to ensure the provision that extends eligibility to the PPP to DMOs remains in the final package:

- Send an [Action Alert](#)
- Publish an [op-ed](#)

FULL ADVOCACY 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 rose for the first time in three weeks, albeit moderately**
 - In the week ending July 25, travel spending tallied \$11.6 billion (up 1% from the previous week) but still registered 51% below last year's levels (an \$11.9 billion loss)
 - Travel spending growth has slowed substantially over the past month, seeing just a 3% increase compared to four weeks ago
 - New York, D.C. and Hawaii again suffered year-over-year losses exceeding 70%. Twelve additional states experienced losses greater than 50%
 - Delaware, Utah and Nebraska experienced the greatest improvements this week
 - As we near the final week of July, the month is on pace for nearly \$52 billion in travel spending losses
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$309 billion in cumulative losses for the U.S. travel economy; at

current levels, travel industry losses are on pace to exceed \$500 billion for the year

- The continual depressed level of travel spending has caused a loss of \$39.6 billion in federal, state and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

Update for DMOs on CARES 2.0

U.S. Travel held an update for DMOs to outline what relief would be available in the HEALS Act, as well as how the industry will need to activate to ensure these provisions remain in the final package.

FULL RECORDING

HR Policies and Protocols: The Future of Corporate Meetings and Events

July 31, 2020 | 11:00 a.m. ET

The Meetings Mean Business will host a virtual discussion tomorrow at 11:00 a.m. ET, where panelists will discuss HR policies and protocols shaping the safe return to corporate meetings and business travel.

REGISTER NOW

A note on the Assessing Recovery webinar series: The next webinar will take place on August 6. An invitation will be sent on Monday, August 2. Access all Assessing Recovery webinar recordings at ustravel.org/assessing-recovery

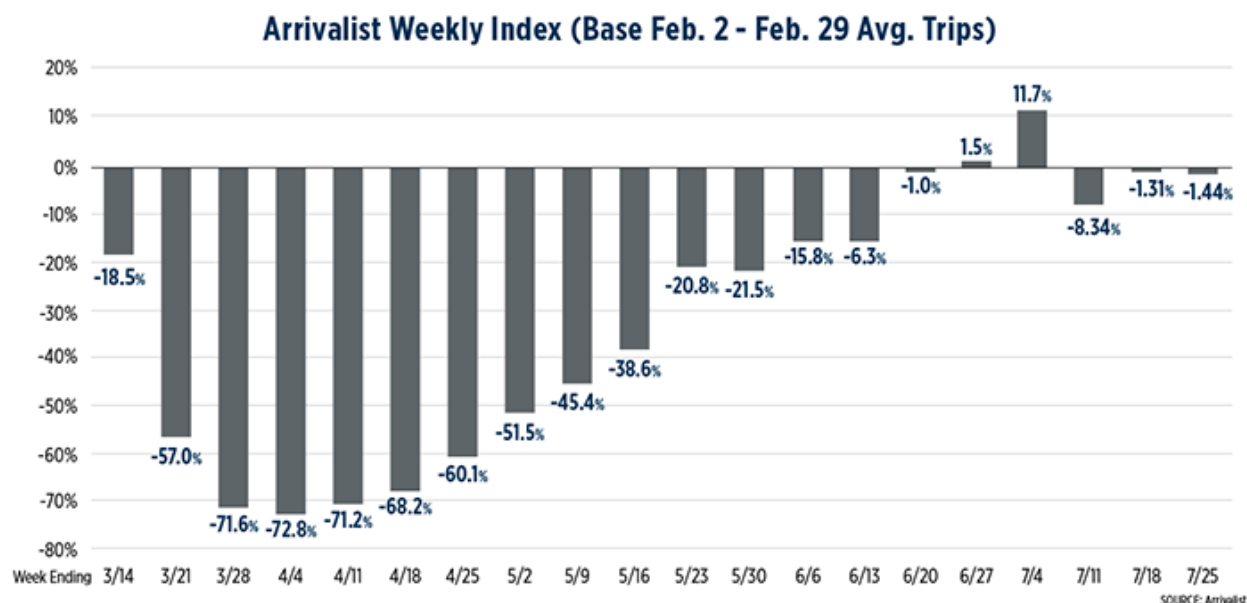
TRACKING TRAVELER TRENDS

Air and road travel—as well as bookings for future travel—all remained stable. While we did not see much growth, we also did not see the declines that some have feared. The big story in booking data is the drastic difference among different states.

Car: Weekly and Daily Travel Index

Arrivalist's Weekly Travel Index, prepared for U.S. Travel Association, measures consumer road trips of 50 miles or more in all 50 U.S. states.

- **Road travel last week remained roughly at pre-pandemic (February) levels, as it was in the previous week**
 - Road travel was just 1.4% lower in the week ending July 25 than it was right before the crisis (in Feb. 2020), nearly unchanged from the previous week
 - While significantly improved from lows of -73% in April, a recovery to February levels of road travel in July still translates into lower than usual levels of travel during the summer
 - Year-over-year data that will allow for a direct comparison to the same time period in 2019 will be available soon



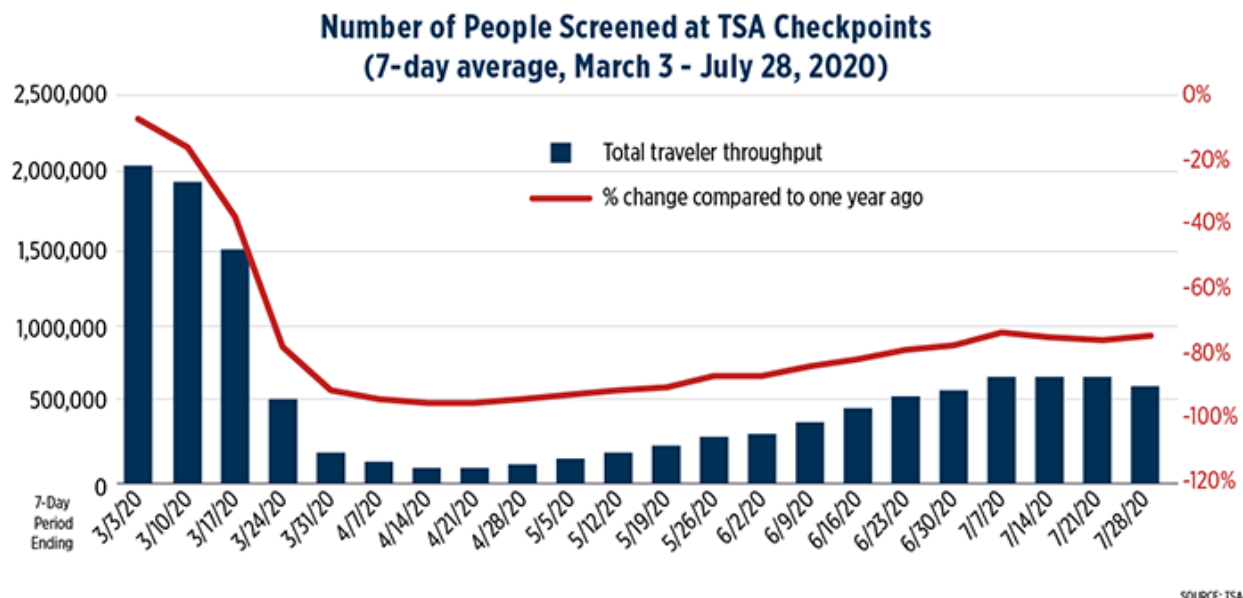
You can also view Arrivalist's [Daily Travel Index](#) here.

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 7-day average of TSA screenings (through Tuesday, July 28) was roughly the same as in the previous week (673,000), and only slightly (1.5%) lower than summer 2020 peaks around the Fourth of July holiday
- On a year-over-year basis, TSA screenings in the last 7-day period were 74% lower than in the same period last year



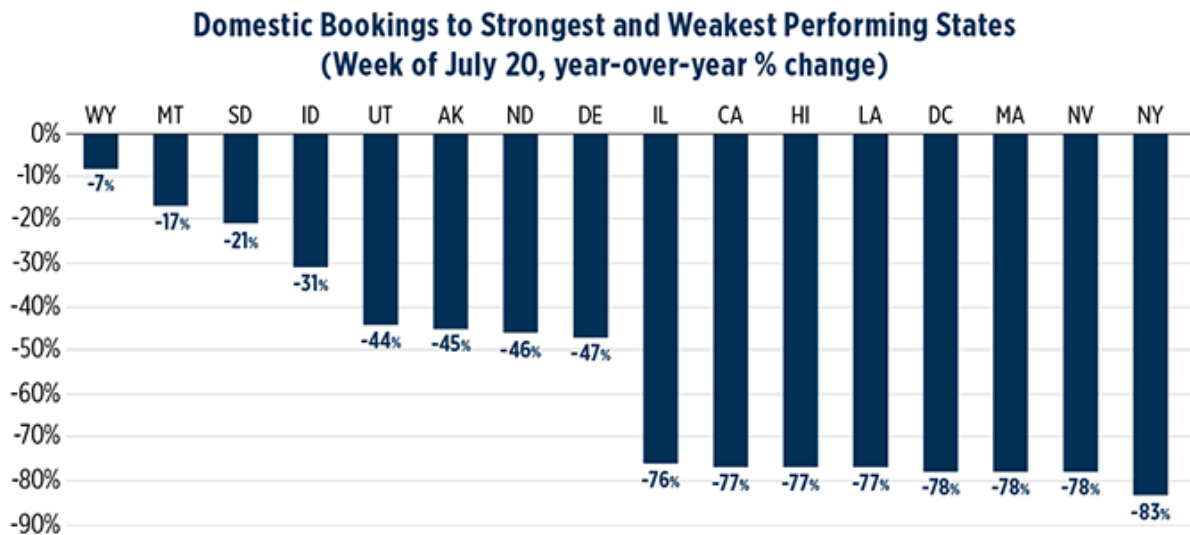
Source: [TSA](#)

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 for a month, the trend in domestic air and hotel bookings for future travel improved slightly over the past two weeks (from -73% year-over-year in early July to -70% last week)

- Domestic bookings to Wyoming (-7%) exhibited, by far, the lowest year-over-year decline, and also performed significantly better than the previous week (-15%). Montana (-17%) and South Dakota (-21%) followed
- Domestic bookings to New York (-83%), Nevada, Massachusetts and D.C. (all -78%) saw the highest declines
- International bookings for future travel to the U.S. were unchanged at -79%



SOURCE: ADARA

TRAVELER TRENDS TRACKER

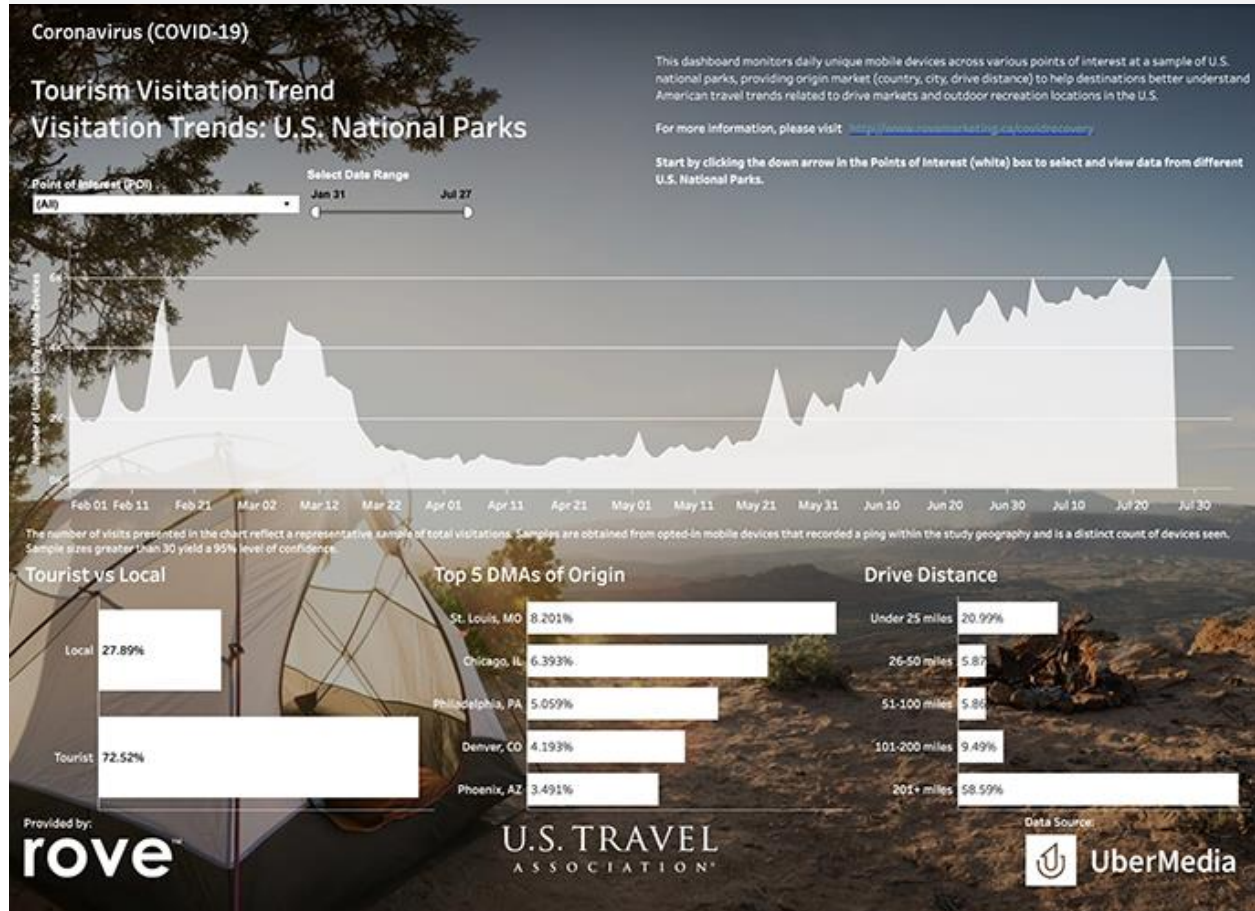
Source: [ADARA](#)

Visitation Trends: U.S. National Parks

In partnership with Rove Marketing and Uber Media, 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. Of the parks captured within the dashboard, trends over the last week are showing:

- A greater percent are driving a distance of 200+ miles

- Sustained growth of daily unique devices that appears to be increasing at a faster rate
- A greater percent of park visitors are tourists rather than locals



NATIONAL PARKS DASHBOARD

Source: [Rove Marketing and Uber Media](http://www.rovemarketing.co/COVIDrecovery)

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

July 27, 2020

- **After reaching record lows in recent weeks, a number of key travel metrics trended more positive this week. These include:**
 - **Excitement for near-term travel (from 41% to 48%)**
 - **Openness to travel inspiration (from 37% to 45%)**
 - **The number of people who say they will take a trip in 2020 (from 53% to 55%)**
- Although a majority of Americans do not expect to travel by air until 2021, those that have recently done so largely rate their experience as positive
 - Three-quarters of these recent air travelers said they were satisfied with the coronavirus safety protocols put in place by the airline(s) and 73% felt satisfied by those protocols instituted by the airport(s)
- American travelers are continuing to embrace face masks in ever larger numbers
 - This week, 81% of American travelers agreed that people should wear face masks in public, up from 78% last week; they are also wearing them more frequently
- While mask wearing may make travelers feel safer, many are feeling very stressed from the pandemic and this has affected travel morale
 - 61% agree that if they were to travel now for leisure, they would not be able to fully enjoy it and half agree that they have lost their taste for traveling for the time being

Source: [Destination Analysts](#)

Back-to-Normal Barometer

July 22, 2020

- The share of those saying they are “ready to go” to a hotel or resort increased slightly in the latest wave of the survey (from 36% two weeks ago to 40% now)
- Nearly one third (31%) of respondents think they have immunity from COVID-19, of which 41% think they are immune because they were already in high-risk situations and didn’t get sick

- Most respondents (69%) agree that if they were to get a COVID-19 vaccine in 2020, they would be likely to travel for leisure in the first half of 2021
- **More than half (54%) of men said that they would be more likely to take a business trip in the fall if schools reopen (only 22% of women said so)**
- **Remote school learning does not seem to make travel in September more likely, except among certain higher income groups**

Source: [Engagious](#)

The Harris Poll CV-19 Tracker

July 27, 2020

- Four in 10 Americans miss traveling on a plane
- **Going on vacation/traveling is the top major purchase Americans plan to make once things return to normal**
- Nearly three-quarters of Americans think travel will look very or somewhat different than pre-COVID-19 once that pandemic is over

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
- [Updated Global Passenger Forecast](#) | IATA
- [Trends Shaping the Post-COVID-19 Travel Market](#) | McKinsey & Company
- [Tracking Consumers' Comfort Level](#) | Morning Consult
- [World Tourism Barometer](#) | UNWTO

- [Changes in Residents' Travel Habits](#) | Visit Anaheim

UPCOMING INDUSTRY WEBINARS

- Ongoing | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions

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](#).