



This week

Negotiations on the next relief package remain stalled and it is likely that Congress won't return to vote on a relief package before September. This is incredibly disappointing. We must continue to [call on Congress](#) and the administration to act quickly.

On Tuesday, the Small Business Administration (SBA) released a policy update with information for those navigating the Paycheck Protection Program (PPP) loan forgiveness process. Information is now available that:

- Explains the appeals process for PPP loan review decisions, including when SBA determines that a borrower was:
 - ineligible for a PPP loan;
 - ineligible for the PPP loan amount;
 - received or used the PPP loan proceeds for unauthorized uses;
 - approved by the lender for PPP loan forgiveness but is ineligible for such loan forgiveness; and/or
 - denied by the lender for PPP loan forgiveness due to ineligibility.
- Clarifies that insurance premiums for vision and dental benefits are eligible payroll costs.
- Clarifies how Economic Injury Disaster Loan advances will be deducted from PPP loan forgiveness.

Updated Resources

- [Paycheck Protection Program factsheet](#)
- [SBA's Appeals of SBA Loan Review Decisions Under the Paycheck Protection Program](#)
- [SBA's Paycheck Protection Program Loans FAQs](#)
- [SBA's Paycheck Protection Program FAQs on Loan Forgiveness](#)

Grassroots Activation

We need Congress and the administration to come back to the table and resume negotiations on the next coronavirus recovery legislation—it simply cannot wait any longer. In order to reignite travel to bring jobs back, keep those that are employed with jobs and grow our economy, our entire industry needs **relief, protection and stimulus—now**. Please help make our voice heard.

SAVE TRAVEL NOW

Together, we have made great progress on expanding eligibility of the PPP to destination marketing organizations in both House and Senate proposals and now we must all work to ensure Congress comes back to finish negotiations and **pass a bill that is meaningful to the entire travel industry**. The action alert includes [all the primary industry asks](#) we have of Congress for this bill. If you have sent an alert before, thank you! We ask that you please send one again.

After you've sent our alert, please share it with your colleagues and visit our [advocacy toolkit](#) for additional ways to engage, including [sample op-eds](#), and more. We would greatly appreciate if you would join us again for this very important push.

REPORT: EMPLOYMENT IN LEISURE &
HOSPITALITY THROUGH JULY 2021

A new [report](#) prepared for U.S. Travel Association by Tourism Economics analyzes job loss in the leisure and hospitality industry due to the coronavirus pandemic.

- 40% of excess U.S. unemployment is in the Leisure and Hospitality (L&H) sector, as defined by the quintennial North American Industry Classification System (NAICS), despite that sector accounting for 11% of all pre-pandemic employment in the U.S.
- **Despite some jobs being slowly restored with the onset of the spring and summer travel seasons, more than a quarter of all L&H workers remain unemployed—double the next most hard-hit industry**
- Nearly half of the 16.9 million jobs in the L&H sector were wiped out in March and April
- If every industry recovered to its pre-pandemic employment level except for L&H, the overall employment rate would fall from 10.2% to 6.2%—still 2.7% higher than pre-pandemic levels

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 4% last week, its largest expansion of the past five weeks**
 - In the week ending August 8, travel spending tallied \$12.4 billion (up 4% from the previous week) but still registered 46% below last year's levels (a \$10.6 billion loss)
 - Nine states and territories experienced losses exceeding 50%. Hawaii and the District of Columbia suffered the worst, with losses exceeding 70%
 - The number of states posting weekly losses of less than 40% increased from 20 states to 28 states, of which eight states have reached weekly losses of less than 30%
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$330 billion in cumulative losses for the U.S. travel economy

- The continual depressed level of travel spending has caused a loss of \$42.3 billion in federal, state and local tax revenue since March 1

[VIEW FULL REPORT](#)

U.S. TRAVEL WEBINARS

Travel Bubbles: How Effective Are They?

For several months, we have been witness to the creation of “travel bubbles,” or alliances between countries deemed to have COVID-19 under control, the goal being to encourage safe travel within the established bubble. As travel bubbles begin to emerge in the U.S., particularly in the Northeast, it is important to explore how effective they are in containing the virus while simultaneously restarting the economy and encouraging people to move again.

This webinar will share new traveler sentiment around travel bubbles and quarantines. Additionally, we will hear from a panel of travel marketers who have found success in promoting travel within established boundaries.

[REGISTER](#)

ICYMI: Accelerating Recovery with the Let's Go There Campaign

The upcoming industrywide Let's Go There campaign looks to inspire and motivate Americans to plan and book their next trip—when they're ready. View the webinar from August 6 to learn about the development of the campaign, research and indicators monitored to determine the launch date, additional timing details and forthcoming assets, as well as ways to get more deeply involved with the campaign. [Full slide deck here](#). More information about the campaign can be found [here](#).

FULL RECORDING

The Let's Go There campaign will launch just after Labor Day. This nationwide movement will require commitment from the entire industry to amplify this message far and wide. If you are interested in joining the Let's Go There Coalition, or if you have any questions, please contact us at letsgothere@ustravel.org.

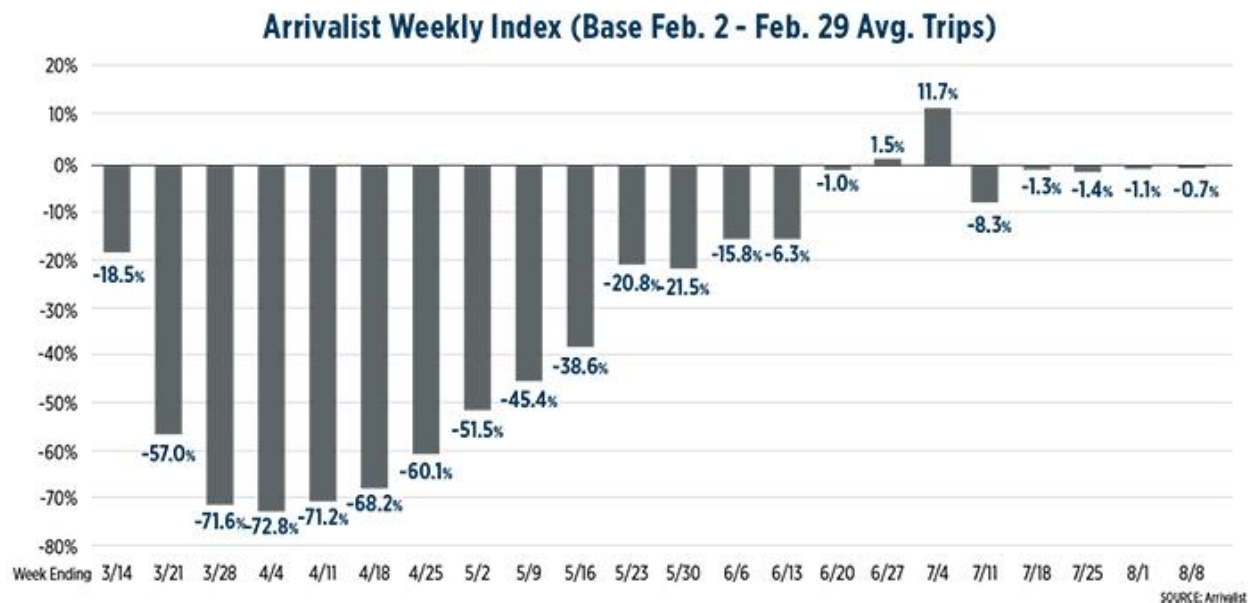
TRACKING TRAVELER TRENDS

Road and air travel grew slightly compared to the previous week. Nevertheless, road travel remained roughly at pre-pandemic February levels (which is low for August) and air travel—while reaching new pandemic highs—remained 72% below August 2019 levels. Bookings for future travel also improved slightly, again with considerable regional differences.

Car: 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 again remained roughly at pre-pandemic (February) levels**
 - Road travel was just 0.7% lower in the week ending August 8 than it was right before the crisis (in Feb. 2020), slightly better than in the previous couple of weeks
 - While significantly improved from lows reaching -73% in April, a recovery to February levels of road travel in August 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



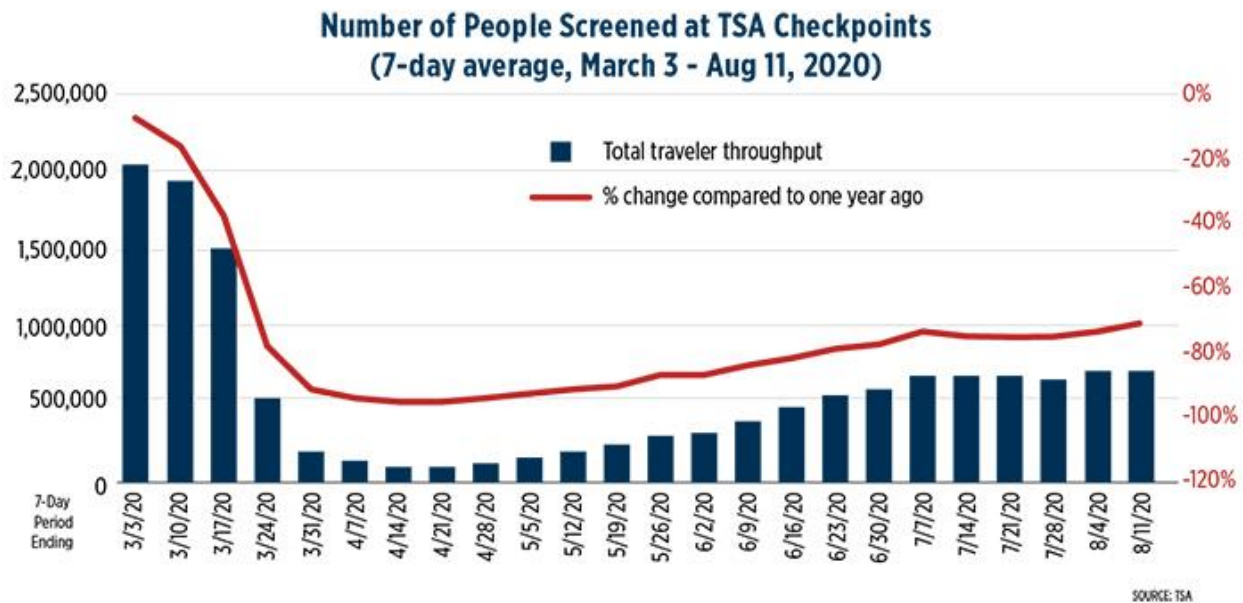
**GO TO DAILY TRAVEL
INDEX**

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.

- **TSA screenings reached a new pandemic peak of 832,000 this past Sunday (the previous daily peak was 800,000 the previous Sunday)**
- The latest 7-day average of screenings (through Tuesday, August 11) surpassed 700,000 for the first time since the start of the pandemic. At 705,000, it was 1.8% higher than in the previous week
- Nevertheless, screenings over the last 7 days remained 72% lower than in the same period last year

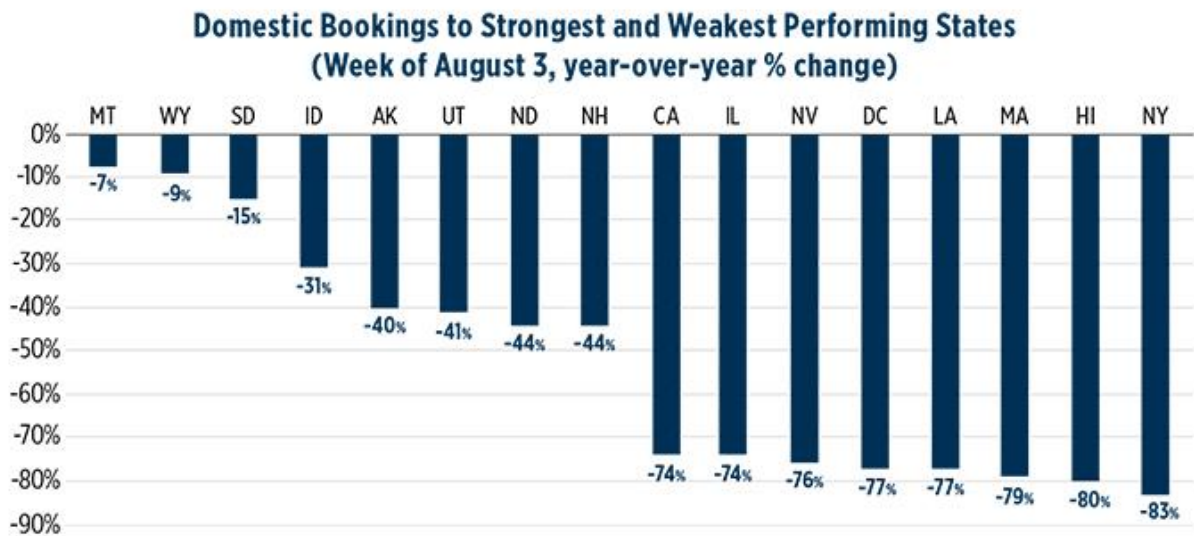


Source: [TSA](#)

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.

- **The trend in domestic air and hotel bookings for future travel improved slightly last week (from -70% to -68% year-over-year), again with vast regional differences:**
 - Domestic bookings to Montana (-7%) exhibited, by far, the lowest year-over-year decline and performed significantly better than the previous week (-14%). Bookings to Wyoming (-9%) and South Dakota (-15%) followed
 - Domestic bookings to New York (-83%), Hawaii (-80%) and Massachusetts (-79%) saw the highest declines
- International bookings for future travel to the U.S. improved slightly from -79% to -77%



SOURCE: ADARA

[GO TO TRAVELER TRENDS](#)

Source: [ADARA](#)

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. Latest findings include:

- Overall volume of unique daily mobile devices remains at the same level as last week
- The rural parks appear to show slight declines over last week, while urban parks are seeing strong growth as many have recently reopened
- **We see well over 90% of devices in rural parks coming from tourists (residing over 50 miles distance from the park) with a strong majority (over 80%) driving over 100 miles to visit the park**

[GO TO DASHBOARD](#)

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Travel Intentions Pulse Survey (TIPS) August 6, 2020

- **The share of respondents who say they are likely to travel by personal car during the next six months reached a new high of 73%**
 - Respondents are also willing to drive further than previously, with **23% willing to drive over 500 miles one way from home on a leisure trip**
 - **The likelihood of staying in hotels/resorts (39%) or vacation homes (29%) during the next 6 months increased over the past few weeks**
- The likelihood of taking a business trip during the next six months has declined significantly since early June
 - Among those who took a business trip in the past 12 months, 31% now say they will likely do so again in the next six months, compared to 41% who said so in early June
- The likelihood of attending a business meeting or convention during the next six months declined
 - Likelihood of attending an off-site business event declined from 22% in early June to 17% in late July
 - Likelihood of attending a conference or convention declined from 20% in early June to 13% in late July
- The likelihood of visiting a park or beach during the next six months increased, while the likelihood of visiting a theme park declined

Source: [MMGY Travel Intelligence](#)

Coronavirus Travel Sentiment Index Report

August 10, 2020

- **Excitement for near-term travel and openness to travel inspiration returned to levels last seen in early June**
 - **Nearly 6-in-10 (57%) agree that planning a vacation for some time in the next 6 months would bring them happiness**
- Even after the COVID situation is resolved, a third of respondents (33%) expect that the travel destinations they visit would change, but this is a drop from the 39% who expected that in April
- While many respondents agree that they will continue to avoid many types of travel experiences in the immediate six months after the COVID-19 situation is resolved, the percentage of those who agree has declined since April
 - 28% agree that they will avoid air travel, down from 38% in April
 - 35% agree that they will avoid conferences and conventions, down from 40% in April
- This week, 14% of respondents report having at least tentative plans to travel to a convention, conference or other group meeting between now and 2021
 - About 60% of these travelers expect this travel to take place this year and the remaining 40% say it will be in 2021
 - While most potential conference attendees say that they would at least “somewhat” trust their fellow meeting attendees, 42% say they would trust them “very little” or “not at all”

Source: [Destination Analysts](#)

Back-to-Normal Barometer

August 5, 2020

- **More than half of respondents agree that for the overall economy to recover, the hotel (56%) and airline (53%) industries must also recover**
- A majority of both Republicans (64%) and Democrats (52%) responded that they are hesitant to travel after seeing news coverage of social unrest
- **While roughly one-third of respondents are consistently saying that they are waiting for a medical breakthrough to travel, when asked what they would do**

if a medical breakthrough was years away and COVID-19 dominates our lives for the foreseeable future, many said they would likely travel sooner:

- **21% of those waiting for a breakthrough would travel by the end of the year if they acknowledge that a breakthrough is too far off**
- **An additional 28% would travel by the end of Q1 2021**
- More than half of respondents are currently working strictly from home (51%) and 81% would ideally like to continue doing so when the economy opens, though most of them still believe they will have to be back by year's end
- One in five respondents said they were very likely to take a weeklong vacation in October

Source: [Engagious](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Travel Intelligence
- [COVID-19 Impact on Hotels and Short-Term Rentals](#) | AirDNA
- [Merchant Resources in Response to Coronavirus \(COVID-19\)](#) | American Express
- [Global Shifts in Entertainment, Spending and Travel](#) | Amex Trendex
- [DMO Data Breakdown](#) | DVA Advertising & Public Relations
- [Small Business Index Q3 2020: July Survey Findings](#) | Ipsos
- [Poll on Consumer Behavior During COVID-19](#) | Ipsos
- [COVID-19 Impact: Recovery Analysis](#) | Kalibri Labs
- [Survey: Small business owners at their breaking point, need additional stimulus relief](#) | Small Business Majority
- [How Travelers Feel About Vacationing Right Now](#) | Virtuoso
- **Article:** [A New View on Leisure Travel in the Time of COVID-19](#) | Expedia Group Media Solutions
- **Article:** [Reimagining the \\$9 trillion tourism economy—what will it take?](#) | McKinsey & Company

UPCOMING INDUSTRY WEBINARS

- Ongoing | [COVID-19 Webinar Series](#) | Expedia Media Group Solutions
- August 18 at 2:00 p.m. ET | [COVID-19 Research Update](#) | Brand USA
- August 20 at 2:00 p.m. ET | [Funding Futures: The Impact and Future of Tourism & DMO Funding in the Response & Recovery From COVID-19](#) | ESTO powered by U.S. Travel Association

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](#).