



This week

Six CEOs from the U.S. travel industry virtually met with Senator Marco Rubio (R-FL) to discuss measures that will provide travel businesses and our workforce with relief and protection, as well as how we can stimulate travel to help drive the recovery of the U.S. economy and the rehiring of Americans. Our specific asks focused on:

- Expanding eligibility to the Paycheck Protection Program (PPP) to include all destination marketing organizations with 300 employees or less (including 501(c)(6) organizations and quasi-governmental destination marketing organizations (DMOs)).
- Extending PPP to the end of 2020, maintaining current affiliation rules, increasing the maximum PPP loan cap above \$2 million.
- While maintaining access to PPP, transition to RESTART or an expanded Recovery Sector Loan program for longer assistance for hardest hit industries.
- Supporting \$10 billion in EDA grants to promote safe and healthy domestic travel.
- Supporting expansion of the Employee Retention Tax Credit (ERTC) to \$15,000 per employee, per quarter, for businesses of all sizes, provide tax credits for PPE and testing, creation of an individual travel tax credit and a tax credit for the meetings and events industry.
- Providing \$13 billion in additional emergency assistance to U.S. airports.

Grassroots Activation

As Congress wraps up negotiations on the final round of coronavirus relief legislation before the election [we must act now](#) if we are to secure our industry as much relief, protection and stimulus as possible. [Please help make our voice heard.](#)

SAVE TRAVEL NOW

Together, we have made great progress on expanding eligibility of the PPP to DMOs, and now we must all work to ensure Congress **passes a bill that is meaningful to the entire travel industry**. The action alert now includes ALL [the industry asks](#) we have of Congress, succinctly outlined to be as clear as possible—so even if you have sent an alert before, and thank you to those who have, it is critical you 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 [social media guides](#), [sample op-eds](#), and more. We would greatly appreciate if you would join us again for this final, very important push.

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 second consecutive week, and saw its largest weekly gain in a month**
 - In the week ending August 1, travel spending tallied \$11.9 billion (up 2% from the previous week) but still registered 48% below last year's levels (an \$11 billion loss)
 - While car trips remained flat compared to the prior week, air trips increased 3%. Despite the uptick, air trips are still just 26% of 2019 levels
 - Eleven states and territories experienced losses exceeding 50%. Hawaii and the District of Columbia suffered the worst with losses exceeding 75%
 - The number of states posting weekly losses of less than 40% increased from 16 to 20
 - While states with large urban centers continue to underperform, they enjoyed relatively strong growth this week. The New England sub-region experienced the largest improvement with all six states ranking in the top 15 for weekly improvement
 - Since the beginning of March, the COVID-19 pandemic has resulted in over \$320 billion in cumulative losses for the U.S. travel economy.
 - The continual depressed level of travel spending has caused a loss of \$41 billion in federal, state, and local tax revenue since March 1

FULL REPORT

U.S. TRAVEL WEBINARS

Accelerating Recovery with the Let's Go There Campaign

The Assessing Recovery webinar today dove into the upcoming industrywide Let's Go There campaign, which shared details on the industrywide marketing campaign that will reignite American's sense of wanderlust and inspire them to plan their next adventure. The webinar covered the development of the campaign, research and indicators

monitored to determine launch, additional timing details, forthcoming assets, as well as ways to get more deeply involved with the campaign. [Full slide deck here.](#)

FULL RECORDING

The Let's Go There campaign, which will launch just after Labor Day, is a nationwide movement that will require not only commitment from the entire industry to amplify this message far and wide, but significant resources to support a robust paid media strategy. For those interested in joining the Let's Go There Coalition, or if you have any questions, please contact us at letsgothere@ustravel.org.

A note on the Assessing Recovery webinar series: The next webinar will take place on August 13. An invitation will be sent on Monday, August 10. Access all recordings on our [Assessing Recovery series webpage](#).

TRACKING TRAVELER TRENDS

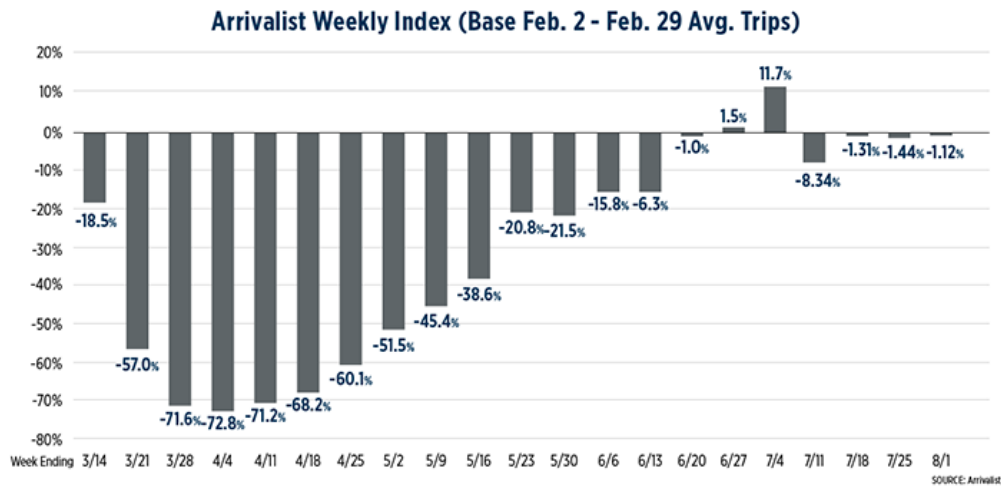
TSA screenings over the last seven-day period grew by 4.5%, reaching 800,000 on Sunday, but remain 73% lower than in the same period last year. Road travel remained roughly the same as in the previous week (just slightly below pre-pandemic February levels) and bookings for future air and hotel travel remained at -70% year-over-year. Regional differences, again, were extremely significant and ranged between -10% (Wyoming) and -83% (New York).

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 1.1% lower in the week ending August 1 than it was right before the crisis (in Feb. 2020), slightly better than in the previous week
 - While significantly improved from lows reaching -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.



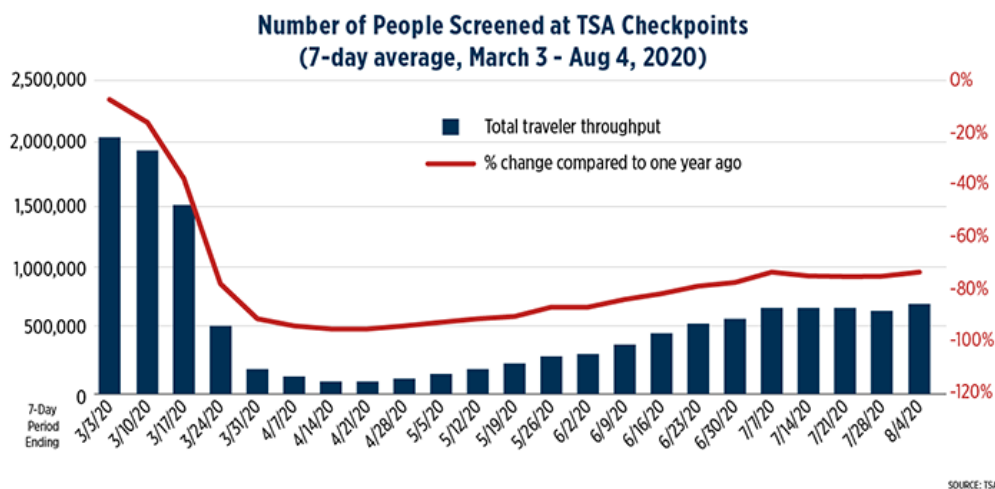
You can also view Arrivalist's [Daily Travel Index](#) here.

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.

- **TSA screenings reached 800,000 this past Sunday, the first time since March.**
The previous pandemic high (over the Fourth of July holiday) was 764,000
- More than 700,000 people were screened for 5 days in a row (this past Thursday through Monday), the first time that has happened since mid-March
- The latest seven-day average of screenings (through Tuesday August 4) was 4.5% higher than in the previous week, the highest jump since the Fourth of July holiday
- Nevertheless, screenings over the last seven days remain 73% lower than in the same period last year

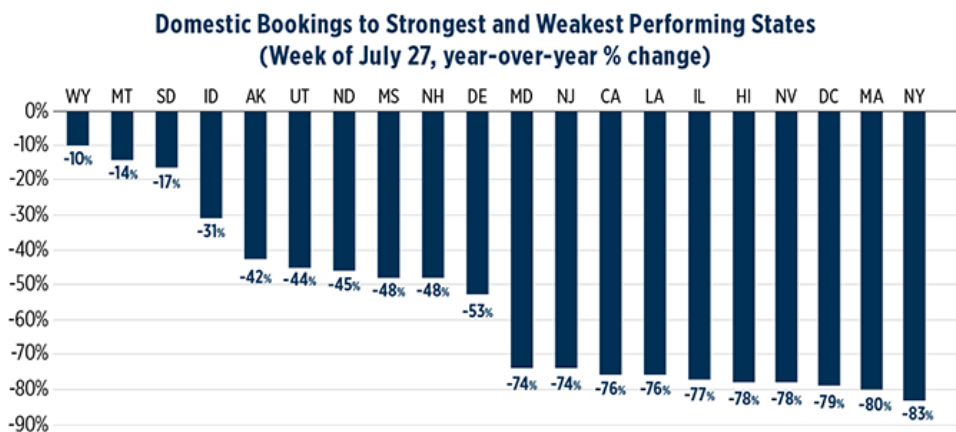


Source: [TSA](#)

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 remained the same last week as in the previous week (-70% year-over-year), again with vast regional differences:**
 - Domestic bookings to Wyoming (-10%) exhibited, by far, the lowest year-over-year decline, but performed slightly worse than the previous week (-7%)
 - Montana (-14%) and South Dakota (-17%) again followed and both performed better than the previous week
 - Domestic bookings to New York (-83%), Massachusetts (-80%), and D.C. (-79%) saw the highest declines, similar to the previous week
- International bookings for future travel to the U.S. were again 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:

- Parks across the country continue to see traffic building. The growth rate seems to have slowed over the last week suggesting several parks are approaching capacity limits

- **While locals are fueling the visitation growth in many national historical sites, tourists are fueling the visitation growth in national parks. National parks such as Glacier, Acadia, Grand Teton, Yellowstone and others are seeing between 80-90% of their visitors driving from over 200 miles away**
- We see a shuffling in the top 5 DMAs of Origin across several parks suggesting new markets appear to be opening up. This is an encouraging signal helping disperse visitor drive routes and give more travel businesses a share of tourism dollars

NATIONAL PARKS DASHBOARD

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

TRAVELER AND CONSUMER SENTIMENT SURVEY RESULTS

Coronavirus Travel Sentiment Index Report

August 3, 2020

- While relatively few (16%) think the situation will improve next month, the proportion of those who think the pandemic will get worse has dropped in the latest wave of the survey (from 62% to 54%)
- Nevertheless, the proportion of travelers who say they would be happy to see an ad promoting their community for tourism when it is safe has dropped from 36% at the end of June to 29% in early August
- 70% say COVID-related concerns are important when selecting specific destinations to visit
- Nearly one-third of travelers say they are less likely to visit American destinations that they most associate with COVID-related issues even after the pandemic ends
 - In addition, 54% say that if a destination they are currently interested in visiting experiences difficulty managing the coronavirus situation, they will be less likely to visit even after the pandemic is over
- **Roughly half of travelers (49%) have travel planned for the remainder of 2020:**
 - **Of those travelers with at least tentative plans, one third have talked to friends or relatives, 28% have booked lodging and 27% have researched things to see and do on their trip. More than one-quarter (27%) have made no travel plans yet**
- When parents of school-aged kids were asked about their likelihood of taking family trips this fall, 35% of parents said they were more likely to take family trips this fall if their children did not have in-person education and 21% said they were less likely to do so

National Tracking Poll: COVID-19 and Travel Sentiment

July 29, 2020

- **Travelers are now relying less on official sources than earlier in the pandemic for information on safety; they are increasingly taking cues from actions of key players within the tourism industry**
 - The percentage of travelers relying on the Centers for Disease Control and Prevention or other federal health agencies dropped from 57% on April 22 to 45% on July 29 and those relying on the White House Coronavirus Task Force declined from 24% to 17%
 - Reliance on information from state health officials slipped from 36% in April to 28% in July
 - **On the other hand, the percentage of travelers saying they are taking cues on whether it is safe to travel from the operating status of major attractions increased from 14% to 18% and the percentage of those taking cues from marketing promotions and deals by the tourism industry increased from 4% to 14%**
- Almost all of the key sentiment indicators that had reversed course from mid-June through early July appear to have stabilized and, in some cases, have begun to point back in the right direction
- Concern about the economy greatly impacting travel plans has hit a survey-low of 16%

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

Travel and Economic Development

July 30, 2020

- **Three in four (76%) expect to travel more in the next year after not being able to travel now**
- 80% are willing to pay more for privacy and distancing, with cleanliness protocols now a big deciding factor
- 87% find that fellow travelers, not travel companies, have a bigger impact on whether they feel comfortable traveling. In other words, travelers do not trust each other to follow COVID-19 safety guidelines
- Near-term travel plans will likely include close family and friends. Nearly two-thirds of parents say COVID-19 has made traveling with their children more likely. Even parents of adult children are more likely to travel as a family
- While the majority Americans (68%) say they are now less interested in travel for work, the remainder (32%) are more interested than ever in work travel. A change of scene for one-third of the working population could be key to long-term workplace happiness and engagement

Source: [Ketchum](#)

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.

SOURCE: MMGY Travel Intelligence

[VIEW LATEST RESULTS >](#)

RESOURCES AND EXAMPLES FROM AROUND THE INDUSTRY

- [COVID-19 Resources](#) | MMGY Global Intelligence
- [Daily COVID-19 Data in Motion](#) | Johns Hopkins University & Medicine
- [Meetings Outlook](#) | MPI
- [July 2020 Rent Report](#) | NYC Hospitality Alliance
- [Frequency and Capacity Statistics](#) | OAG

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

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](#).



COVID-19 Travel Data | August 6, 2020

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