

# Travel Sentiment Survey

## Results Report

Wave 1: 3/27/20-3/31/20



# Study Overview

# Our Approach

Ongoing representative study of U.S. travelers to understand how the present-state of COVID-19 is impacting their desires and decisions around travel.

- + This study was conducted as an online survey.
- + Sample was sourced via Amazon Mechanical Turk, the largest global crowdsourcing platform for social science research.
- + Respondents were screened to fit the following criteria:
  - + Age 18+
  - + Have taken a leisure trip outside of the state they live in with at least one overnight stay within the past 2 years
- + Best efforts were made to obtain a demographically representative sample.
- + Data were weighted by age, gender, and income to match U.S. travelers who are 18 years or older.
- + Data were collected between March 27<sup>th</sup>, 2020 and March 31<sup>st</sup>, 2020.
- + A total of 510 individuals completed the survey.

# Summary of Key Findings

# Current Travel Mindset

- + **Overall, traveling is still on U.S. travelers' minds.** Just over 8 in 10 say they are currently planning, thinking, or dreaming about travel.
- + **About half of U.S. travelers (52%) say they only want to see travel advertising that is addressing the response to the COVID-19 pandemic**
  - + And about half (48%) say that they feel it is insensitive for travel companies and destinations to advertise right now.
- + **However, about 4 in 10 (42%) say that even now, they like to see advertising for vacation destinations.**
  - + Those who are either currently planning a future trip, thinking about future travel, or dreaming about travel all are more likely to say that even now, they like to see advertising for vacation destinations as compared to those who have put all thinking of travel on hold.
- + **The majority of U.S. travelers (81%) believe the travel industry had the power to combat COVID-19. Within the 81%, perceptions are split in terms of whether the industry handled the situation appropriately or poorly.**
  - + Those who are currently planning to travel, thinking about future travel, or are travel dreaming are all more likely to say the industry responded appropriately as compared to those who have put all travel thoughts on hold.
  - + How the travel industry is perceived to have responded to the COVID-19 crisis is correlated with consumer travel intent (.23\*) and intent to spend (.24\*).

# Perceived Safety of U.S. Travel Following COVID-19

- + **A majority of U.S. travelers feel travel will be safe after the travel restrictions are lifted:**
  - + Just over 6 in 10 U.S. travelers (62%) say they expect travel to be at least somewhat safe, while just under one-fourth (24%) say they expect it will be at least somewhat unsafe. 14% are neutral.
  - + Interestingly, younger U.S. travelers are more likely to expect travel within the U.S. to be unsafe following the pandemic, while older U.S. travelers are more likely to expect travel to be safe.
  - + Perceived safety of travel in the U.S. is correlated with future travel intent (.26\*).
- + **However, a few main safety concerns exist, including large groups of people and modes of transportation:**
  - + U.S. travelers think two factors will be most concerning immediately following the pandemic, with just under half (45%) ranking these as the #1 or #2 concern: the safety on public transportation (like airplanes, buses, and boats) and the spreadability of COVID-19 among large groups of people.
  - + By far, U.S. travelers say that travel by car will be the safest, while travel by cruise will be the least safe.
  - + U.S. travelers say they will avoid two types of places more than any others: cruises (52%) and festivals (47%).

# Future Travel Intentions

- + **At this point, U.S. travelers believe they will return to their typical travel behaviors fairly quickly.**
  - + Nearly half of U.S. travelers (46%) say they will return to their normal travel behaviors sometime between a few weeks after the official “all clear” to immediately afterwards, with one-fourth saying they will return to normal behaviors either after a few days or immediately.
  - + Despite perceiving travel in the U.S. following the pandemic to be more unsafe, younger U.S. travelers are more likely to say they will return to their typical travel behaviors quickly as opposed to older U.S. travelers.
  - + Travel mindset (whether one is currently planning, thinking about, dreaming, or not at all thinking about travel) is correlated with how quickly one will resume travel behaviors (.24\*).
- + **A strong majority of U.S. travelers (85%) say they would engage in some kind of leisure travel immediately following the removal of travel restrictions, with 72% saying they would engage in U.S. leisure travel.**
- + **At this point, U.S. travelers say they will either not change how often they travel for leisure or will be traveling less often as compared to before the pandemic.**
  - + Over half (55%) say they will travel less, with just over one-fourth (26%) saying they will travel a lot less often. Just over one-third (37%) say they will not change how often they travel for leisure. Only just under 1 in 10 U.S. travelers (8%) say they will travel more. Overall, there is a -48 net difference in intent to travel in the future.

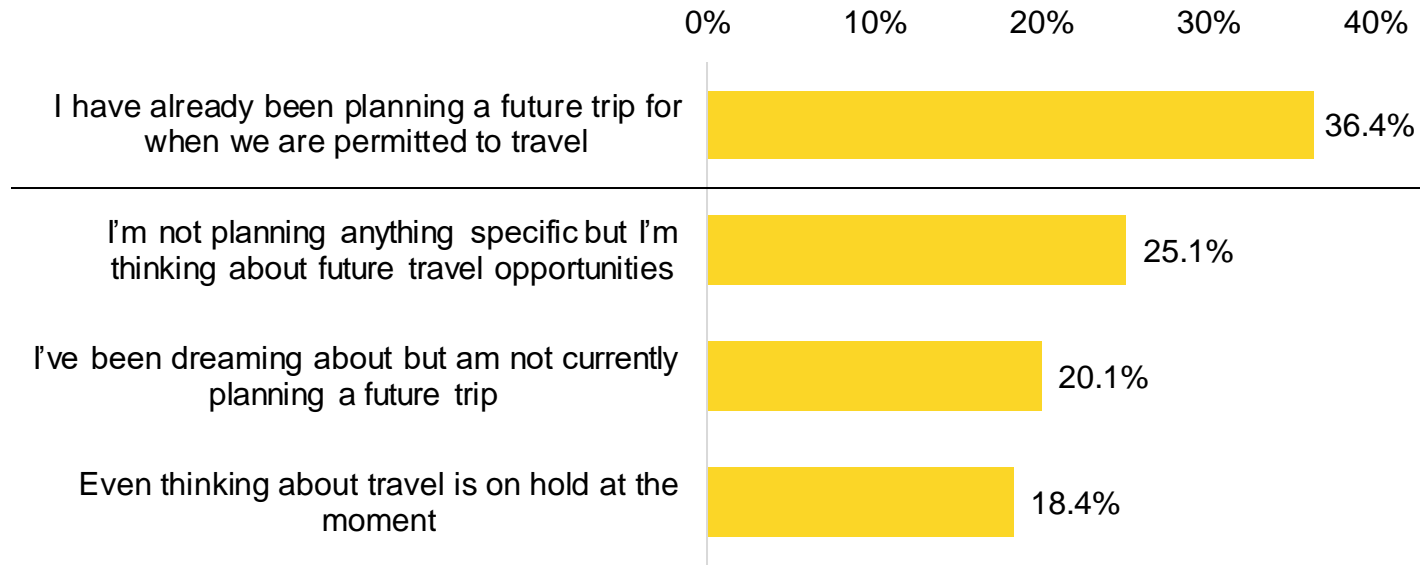
# Future Travel Intentions (cont.)

- + **The majority of U.S. travelers (63%) say they will set aside the same amount of money for leisure travel in the U.S. after the pandemic as compared to before:**
  - + Just under 3 in 10 (29%) say they will set aside less money, and only just under 1 in 10 (9%) say they will set more money aside. U.S. travelers who are age 18-24 are more likely to say they will put more money aside, as compared to older U.S. travelers. Overall, there is a -20 net difference in intent to set aside money for travel in the future.
- + **Overall, U.S. travelers are looking to use their post-COVID-19 travel opportunities to connect with others:**
  - + U.S. travelers say they are most looking forward to traveling with their spouse or partner (49%), followed by other family (39%) and friends (36%). Only 17% say they are most looking forward to traveling on their own.
- + **U.S. travelers will seek destinations that still provide them some distance from others – choosing places that are more outdoors, rural or smaller communities.**
  - + 34% favor road trips, 28% look forward to beach getaways, 23% seek outdoor adventures, and 39% favor small-market or “less populated” getaways.
- + **U.S. travelers say they will trust two information sources more than any others when deciding where and when to travel: the U.S. government and news media outlets.**

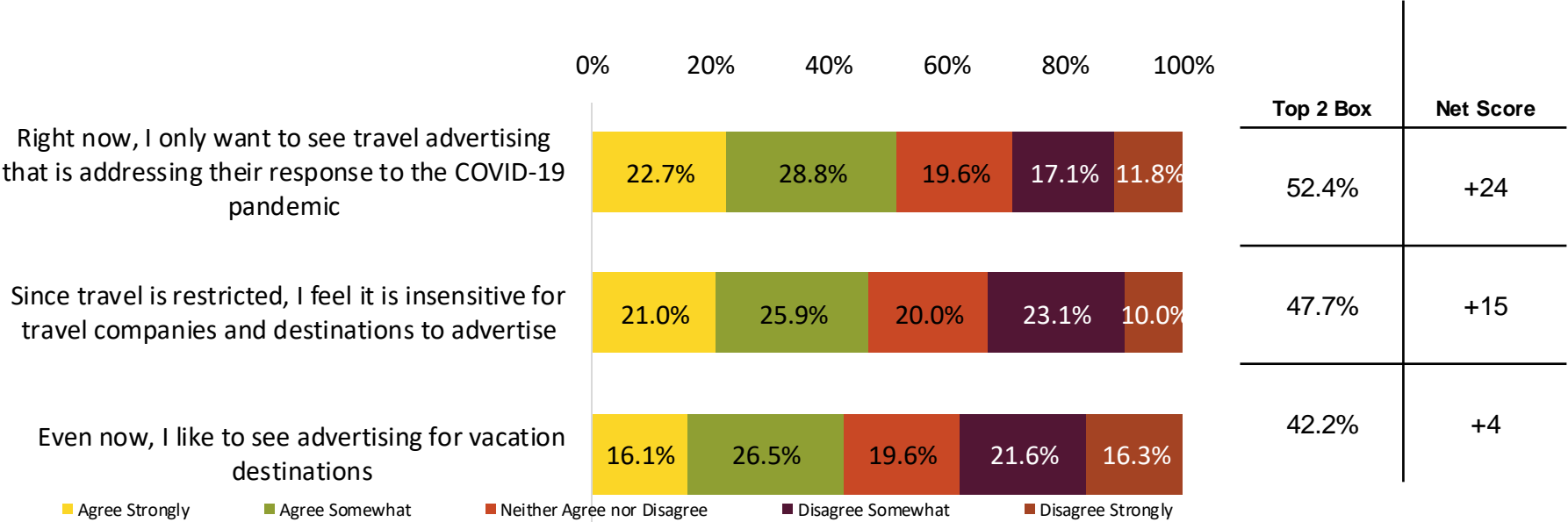


# Detailed Findings

# Over 8 in 10 U.S. travelers are currently planning, thinking, or dreaming about travel.



# Many travelers want to see travel advertising, especially related to COVID-19.

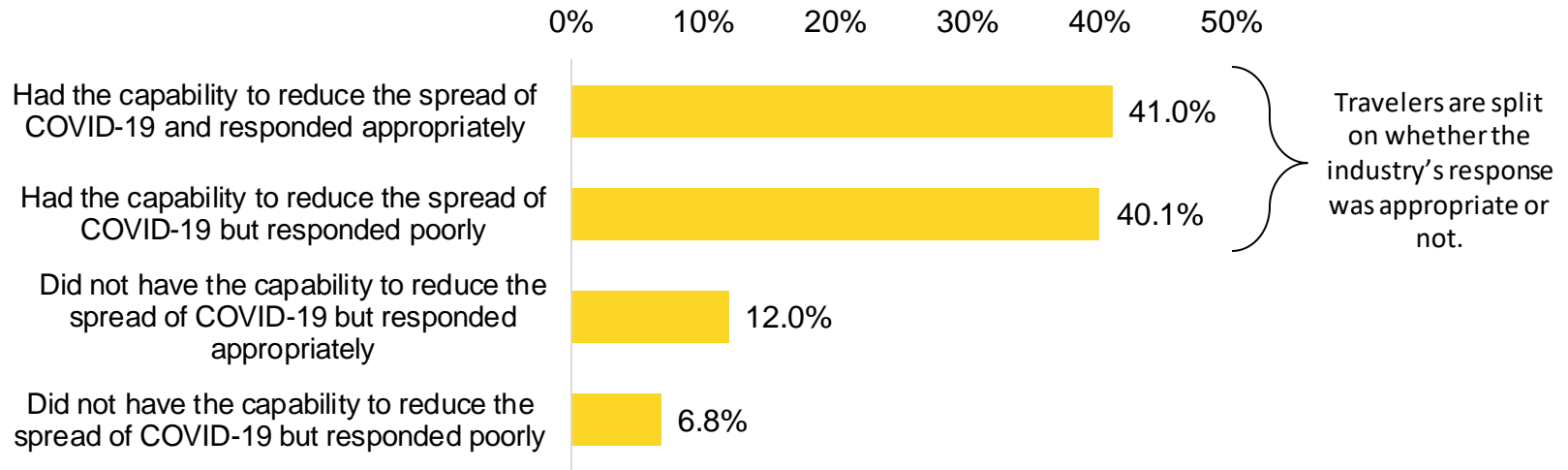


# Desire to see travel advertising is correlated to trip dreaming/planning.

|   | Total<br>n = 510 | I have already been<br>planning a future<br>trip<br>"Ready Whenever<br>You Are"<br>n = 186<br>A | I'm not planning<br>anything specific<br>but I'm thinking<br>about future travel<br>"I'd Consider it"<br>n = 126<br>B | I've been dreaming<br>about but am not<br>currently planning<br>"Wanderlusting for<br>Now"<br>n = 104<br>C | Even thinking<br>about travel is on<br>hold<br>"Press Pause!"<br>n = 94<br>D |
|---|------------------|---|---|--|--|
| Top 2 Box   |                  |   |   |  |  |
| Right now, I only want to see travel advertising that is addressing their response to the COVID-19 pandemic | 52.4%            | 45.5%   | 51.4%   | 55.4%  | 64.1% A  |
| Since travel is restricted, I feel it is insensitive for travel companies and destinations to advertise     | 47.7%            | 39.1%   | 44.9%   | 50.5%  | 65.1% ABC  |
| Even now, I like to see advertising for vacation destinations   | 42.4%            | 52.7% BD  | 36.7% D   | 51.2% BD   | 20.1%  |

Q5. Indicate how much you agree or disagree with the following statements about the travel industry in the current climate. (Response scale: 1 = Disagree Strongly, 5 = Agree Strongly)

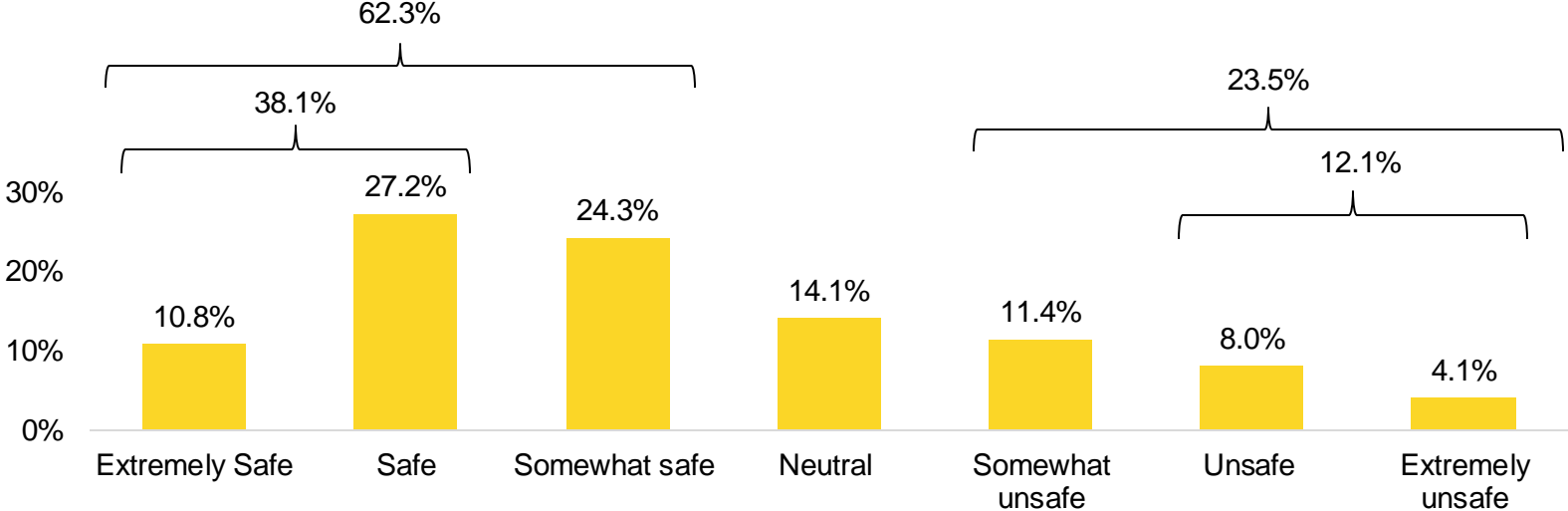
# Over 8 in 10 believe the travel industry had the capability to reduce spread but are divided on whether it responded appropriately.



# Those who are dreaming/planning travel are more likely to say the industry responded appropriately.

|  | Total<br>n = 510 | I have already<br>been planning a<br>future trip<br>"Ready Whenever<br>You Are"<br>n = 186<br>A | I'm not planning<br>anything specific<br>but I'm thinking<br>about future travel<br>"I'd Consider it"<br>n = 126<br>B | I've been dreaming<br>about but am not<br>currently planning<br>"Wanderlusting for<br>Now"<br>n = 104<br>C | Even thinking<br>about travel is on<br>hold<br>"Press Pause!"<br>n = 94<br>D |
|--|------------------|---|---|--|--|
| Had the capability to reduce the spread of COVID-19 and responded appropriately          | 41.0%            | 54.8% BCD   | 37.3% D   | 38.8% D  | 21.3%  |
| Had the capability to reduce the spread of COVID-19 but responded poorly                 | 40.1%            | 29.4%   | 37.3%   | 48.6% A  | 56.2% AB   |
| Did not have the capability to reduce the spread of COVID-19 but responded appropriately | 12.0%            | 8.7%  | 16.4% A   | 11.4%  | 13.3%  |
| Did not have the capability to reduce the spread of COVID-19 but responded poorly        | 6.8%             | 7.1%  | 9.0% C  | 1.3%   | 9.3% C   |

# Majority of U.S. travelers feel travel will be safe after the travel restrictions are lifted.



Q8. Thinking ahead, once the COVID-19 pandemic is over and the travel restrictions are lifted, how safe do you expect travel to be in the U.S.?

BVK (Response scale: 1 = Extremely unsafe; 7 = Extremely safe)

# Younger travelers are more likely than older travelers to expect travel within the U.S. to be unsafe.

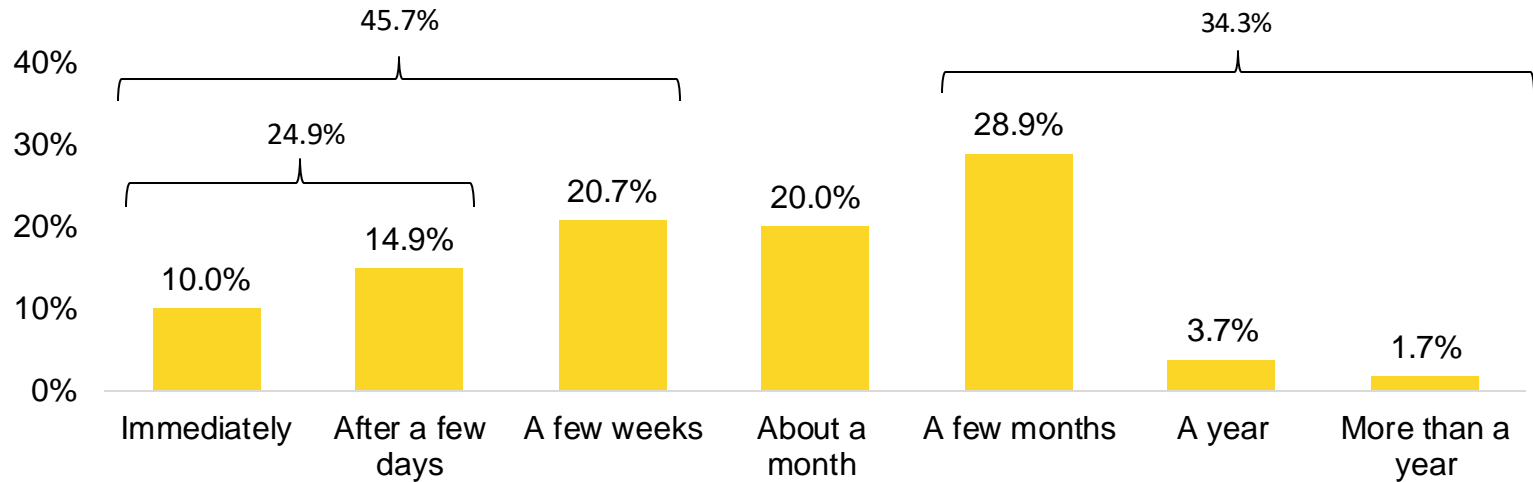
|   | Total<br>n=510 | 18-24<br>A<br>n=70 | 25-34<br>B<br>N=146 | 35-44<br>C<br>n=59 | 45-54<br>D<br>n=92 | 55+<br>E<br>n=143 |
|---|----------------|--------------------|---------------------|--------------------|--------------------|-------------------|
| <b>Top 3 Box</b> (extremely safe, safe, somewhat safe)          | 62.3%          | 48.6%              | 57.6%               | 53.9%              | 71.6% ABC          | 70.4% ABC         |
| Neutral   | 14.1%          | 14.8%              | 15.9%               | 17.2%              | 11.5%              | 12.6%             |
| <b>Bottom 3 Box</b> (extremely unsafe, unsafe, somewhat unsafe) | 23.5%          | 36.6% DE           | 26.6% E             | 29.0%              | 16.9%              | 16.9%             |

Q8. Thinking ahead, once the COVID-19 pandemic is over and the travel restrictions are lifted, how safe do you expect travel to be in the U.S.?

BVK (Response scale: 1 = Extremely unsafe; 7 = Extremely safe)



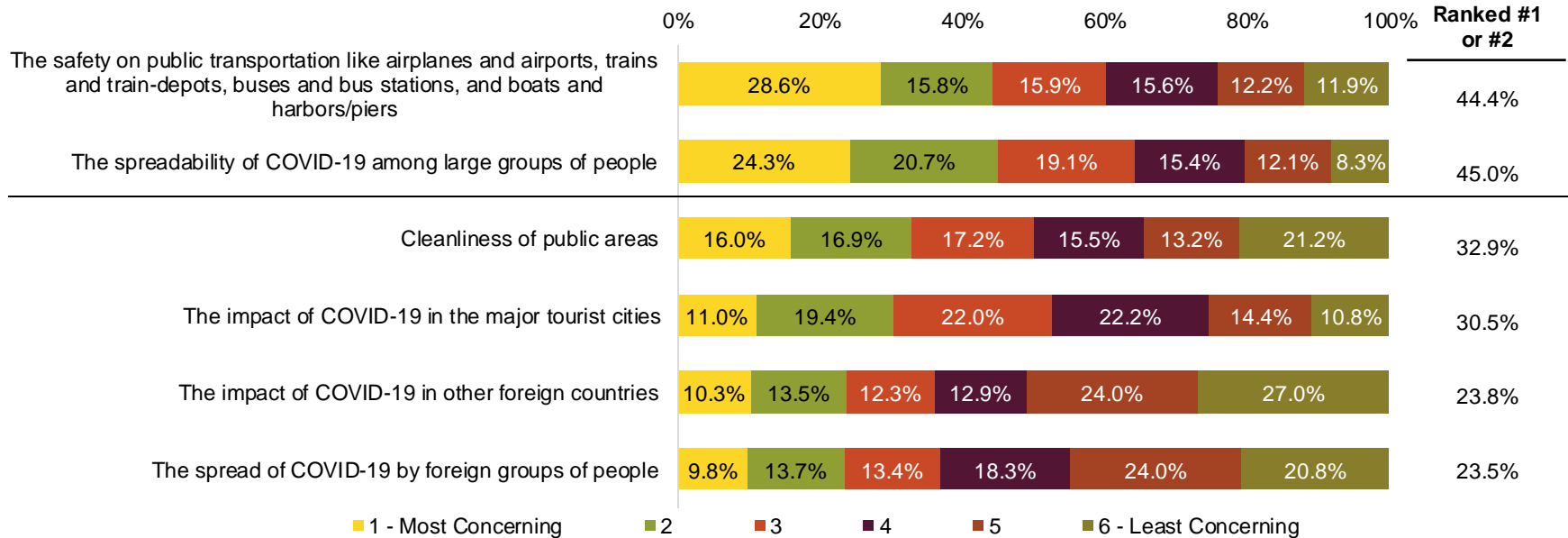
# U.S. travelers believe they will return to their typical travel behaviors fairly quickly once given the “all clear.”



# Despite perceiving travel to be more unsafe, younger travelers are more likely to say they will return to their typical travel behaviors quickly.

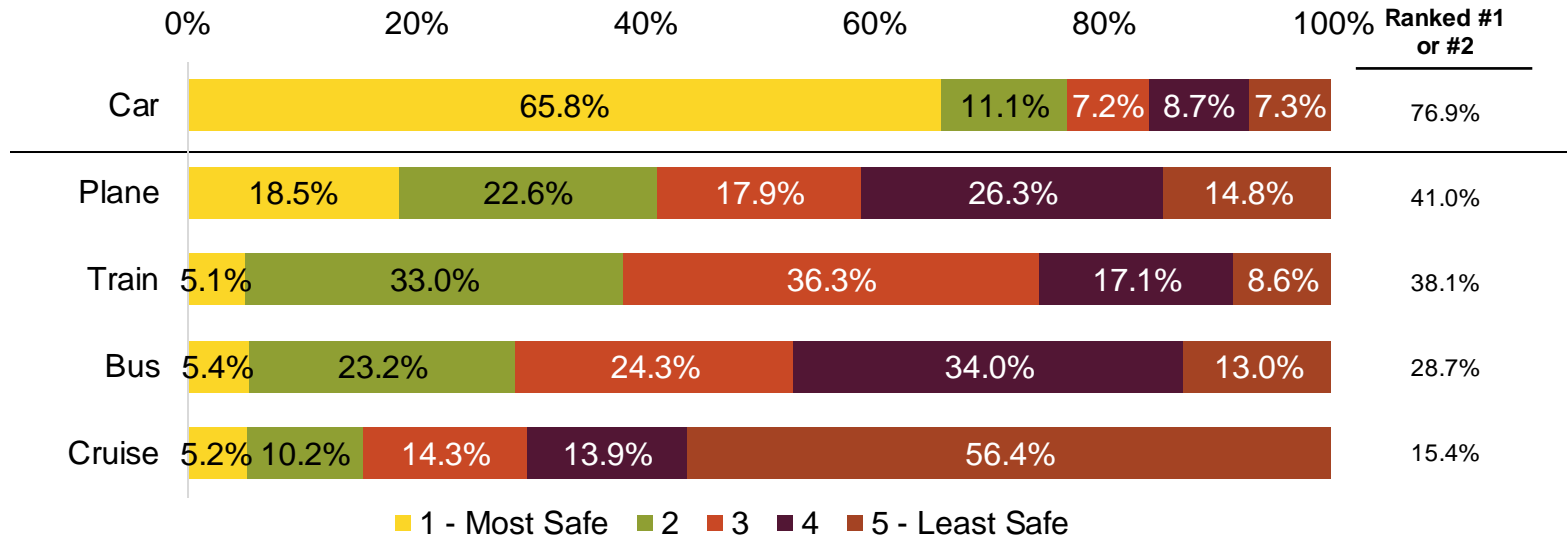
|   | Total<br>n=510 | 18-24<br>A<br>n=70 | 25-34<br>B<br>N=146 | 35-44<br>C<br>n=59 | 45-54<br>D<br>n=92 | 55+<br>E<br>n=143 |
|---|----------------|--------------------|---------------------|--------------------|--------------------|-------------------|
| <b>Top 3 Box</b> (immediately, after a few days, a few weeks) | 45.7%          | 65.2% CDE          | 51.9% E             | 37.3%              | 49.4% E            | 32.8%             |
| About a month   | 20.0%          | 19.1%              | 20.0%               | 20.2%              | 17.0%              | 22.2%             |
| <b>Bottom 3 Box</b> (more than a year, a year, a few months)  | 34.3%          | 15.7%              | 28.1%               | 42.5% A            | 33.7% A            | 45.0% AB          |

# Public transportation and large groups of people are most concerning and likely to impact decisions.



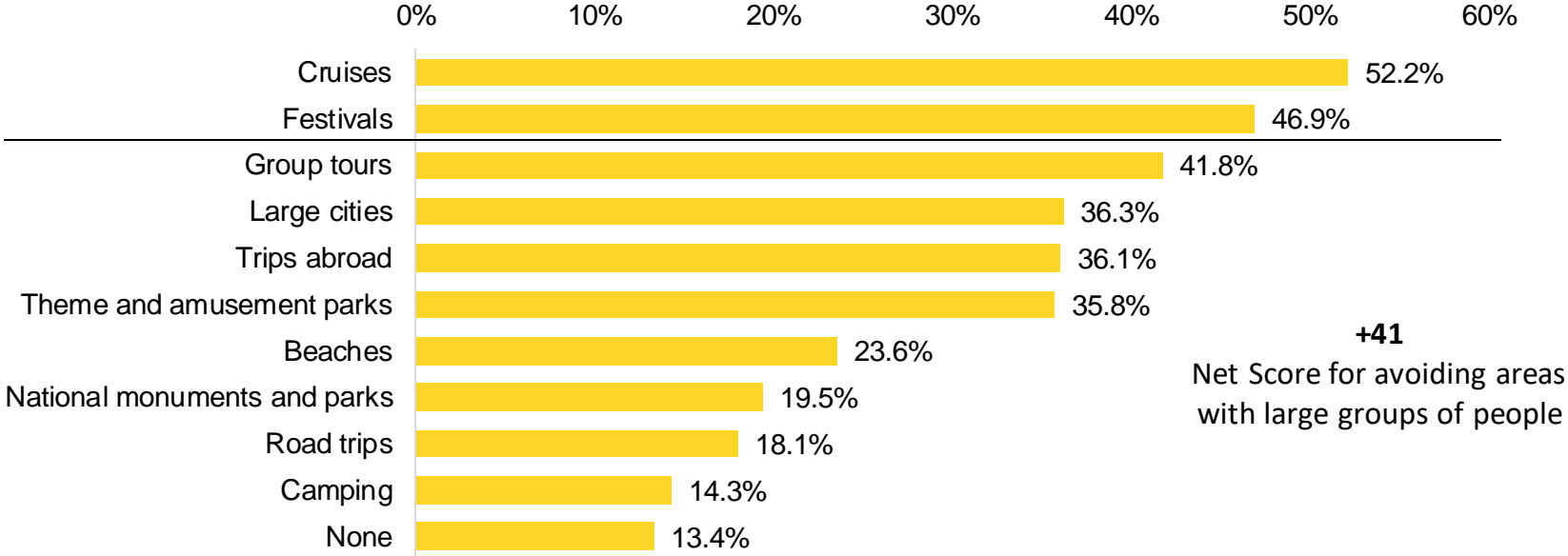
Q10. Thinking specifically about the time immediately following the pandemic, what concerns about COVID-19 do you think will impact people's decisions to travel? (Please click and drag to rank the listed selections below, where 1 = most concerning and 6 = least concerning)

# By far, U.S. travelers say that travel by car will be the safest, while cruise will be the least safe.

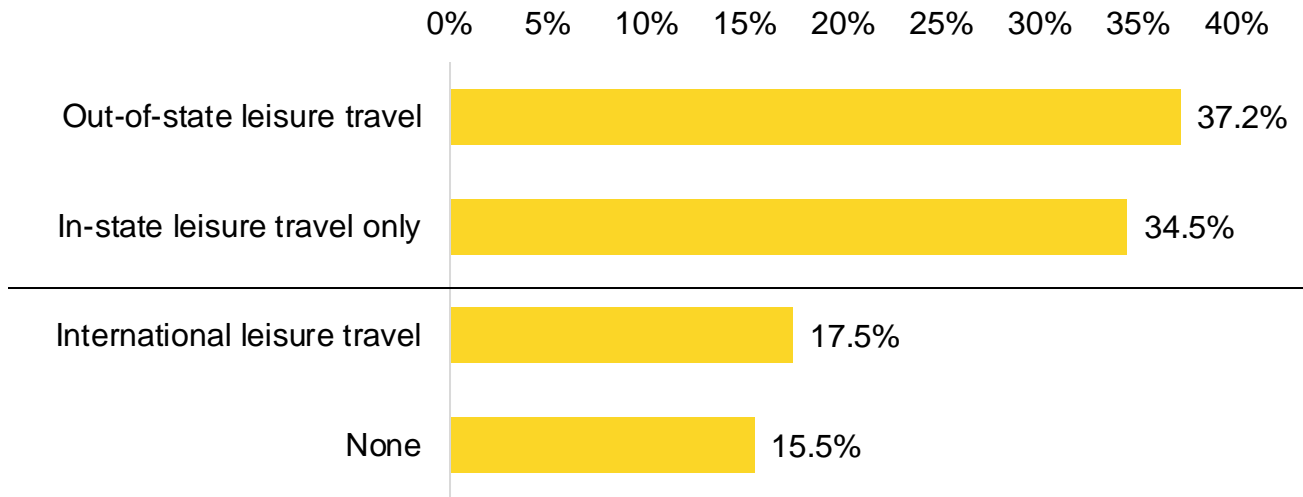


Q11. And still thinking about the time immediately following the pandemic, which modes of transportation will be the safest for traveling long distances? (Please click and drag to rank the listed selections below, where 1 = the most safe and 5 = the least safe)

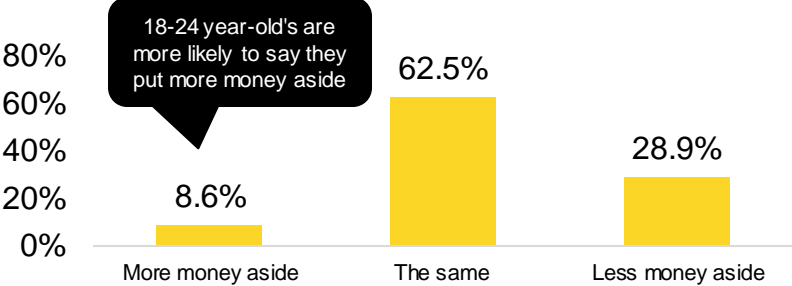
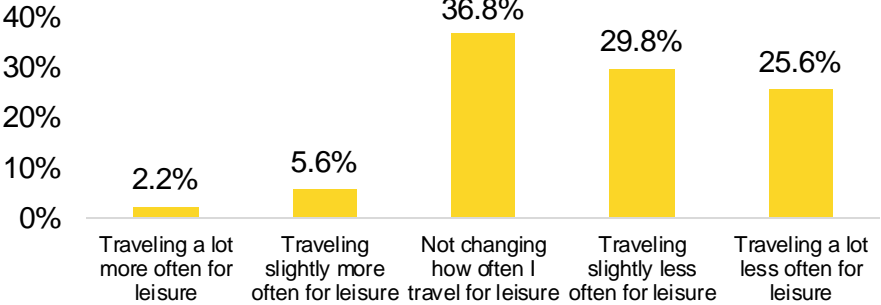
# U.S. travelers say they will avoid two types of places more than any others: cruises and festivals.



# Once given the “all clear” 37% of travelers will pursue an out-of-state trip.



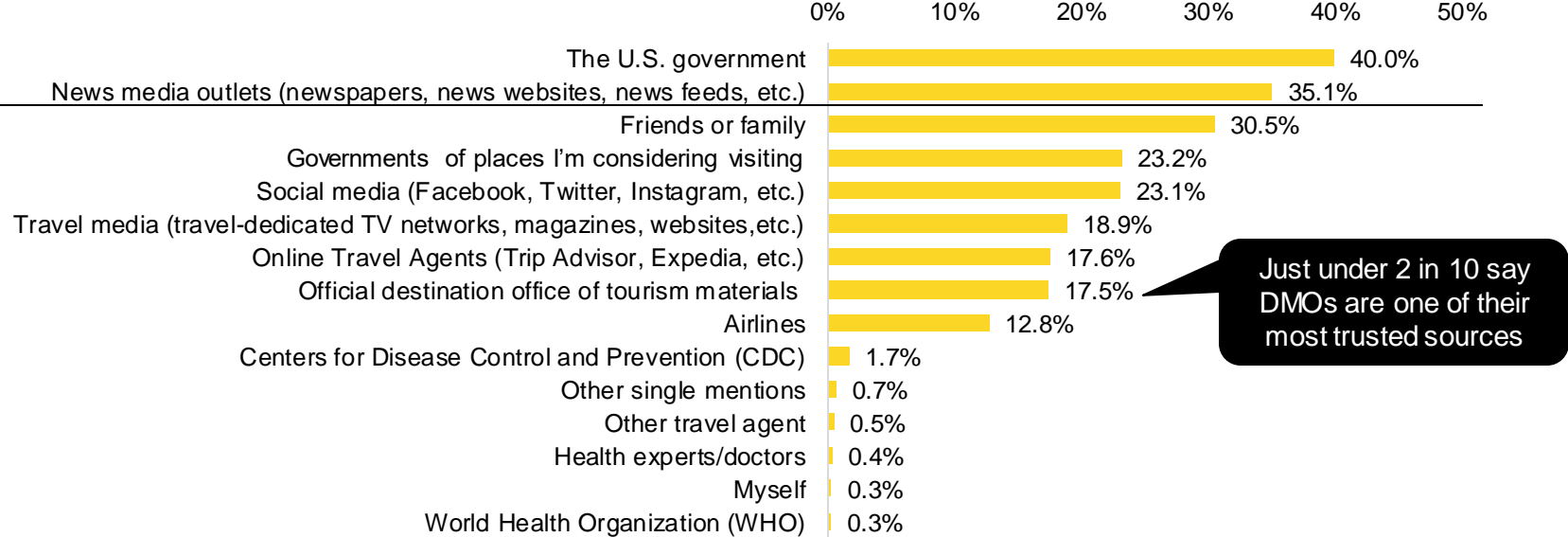
# Amount of travel and money spent on travel will either remain unchanged or decrease.



Q12. Longer term, as a result of the COVID-19 pandemic, which of the following do you anticipate for your own leisure travel within the U.S., compared to before the pandemic?

Q13. Once the COVID-19 pandemic is past, do you expect to set aside more, the same, or less money for your leisure travel in the U.S., compared to before the pandemic?

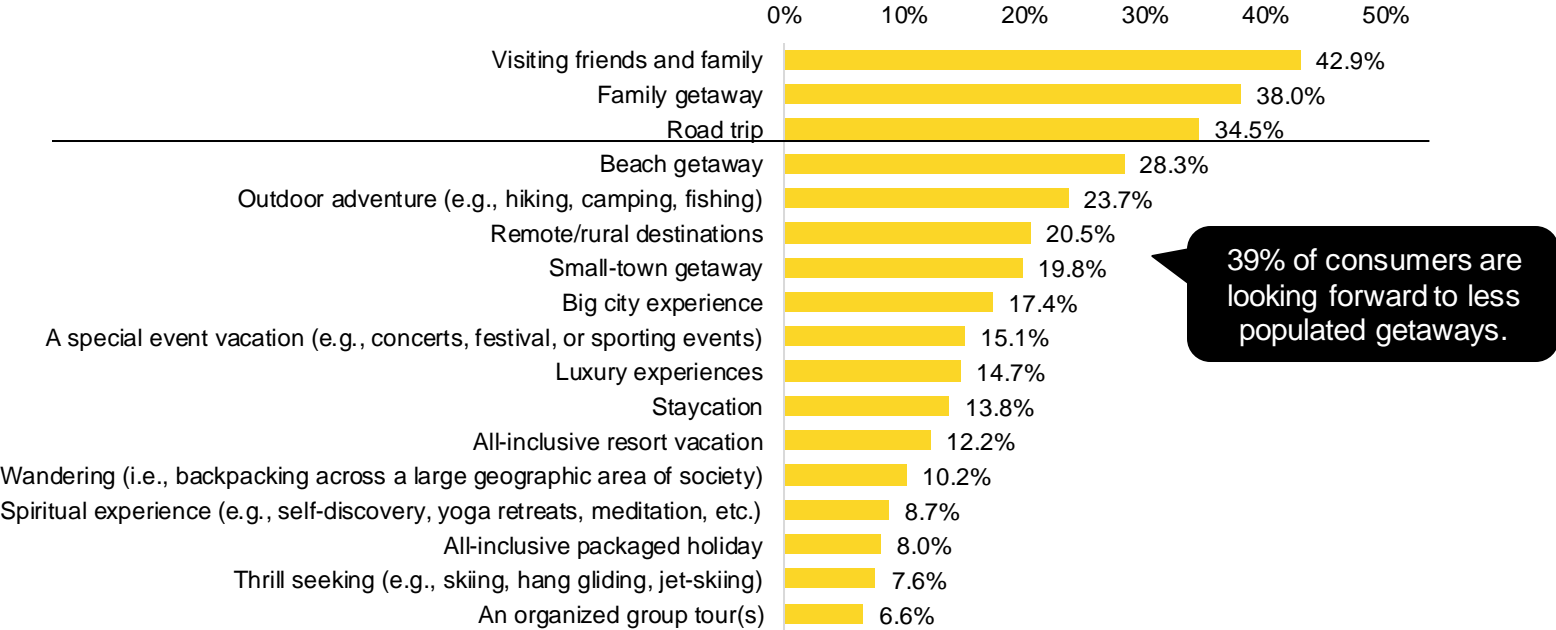
# Travelers trust the U.S. government and news media most for information to help them determine travel.



Q18. When planning your next leisure travel, who will you most trust to provide information that will help you decide where and when to travel? (Please select up to three.)

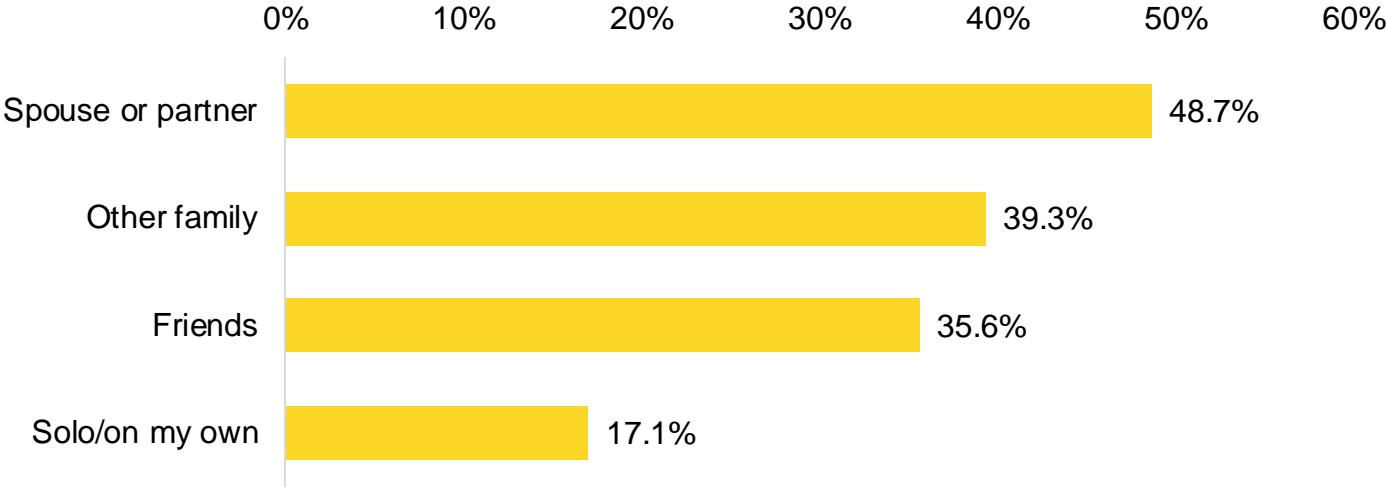


# Vacations outdoors with friends and family are most looked forward to.



Q15. What type of travel vacation are you looking forward to taking within the U.S. after the COVID-19 pandemic? (Select those you are most looking forward to – up to 5.)

# Travelers are most looking forward to traveling with their spouse or partner or other family.



Q16. When travel restrictions are lifted and you take that first vacation post-COVID-19, who are you most looking forward to spending the time with?  
(Indicate all that apply.)

# Participant Profile

# Participant Profile

|        |                      | (n=510)     |
|--------|----------------------|-------------|
| Age    | 18-24                | 13.7%       |
|        | 25-34                | 28.6%       |
|        | 35-44                | 11.6%       |
|        | 44-54                | 18.0%       |
|        | 55-64                | 19.2%       |
|        | 65-74                | 8.2%        |
|        | 74 or older          | 0.6%        |
|        | Mean                 | 42.4        |
|        | Median               | 39.5        |
| Gender | Male                 | 49.2%       |
|        | Female               | 50.5%       |
|        | Other                | 0.1%        |
| Income | Under \$35,000       | 15.7%       |
|        | \$35,000-\$49,999    | 22.5%       |
|        | \$50,000-\$74,999    | 19.6%       |
|        | \$75,000-\$99,999    | 17.6%       |
|        | \$100,000-\$149,999  | 14.9%       |
|        | \$150,000-\$199,999  | 4.9%        |
|        | \$200,000-\$249,999  | 2.2%        |
|        | \$250,000 or more    | 2.4%        |
|        | Prefer not to answer | 0.2%        |
|        | Mean                 | \$78,707.80 |
|        | Median               | \$62,499.50 |

|                              |                                       | (n=510) |
|------------------------------|---------------------------------------|---------|
| U.S. Region                  | Northeast                             | 14.7%   |
|                              | Midwest                               | 15.5%   |
|                              | South                                 | 40.8%   |
|                              | West                                  | 29.0%   |
|                              |                                       |         |
| Income                       | Married                               | 64.7%   |
|                              | Single, never married                 | 24.7%   |
|                              | Divorced                              | 6.1%    |
|                              | Widowed                               | 2.7%    |
|                              | Separated                             | 1.0%    |
|                              | Other (specify)                       | 0.8%    |
| Education                    | High school diploma or GED            | 5.9%    |
|                              | Trade or technical school certificate | 4.3%    |
|                              | Associate Degree                      | 11.4%   |
|                              | Some college                          | 6.9%    |
|                              | Bachelor's degree                     | 55.7%   |
| Employment Status            | Graduate degree                       | 15.9%   |
|                              | Work full time                        | 74.9%   |
|                              | Work part time                        | 7.8%    |
|                              | Self-employed                         | 7.6%    |
|                              | Retired                               | 5.3%    |
|                              | Student                               | 3.1%    |
|                              | Homemaker                             | 1.8%    |
| Unemployed, looking for work | 1.57%                                 |         |

|                        |  | (n=510) |
|------------------------|--|---------|
| Presence of Children   | Yes  | 49.0%   |
|                        | No   | 51.0%   |
| Travel in Past 2 Years | I have taken a leisure trip within the United States in the past two years | 83.9%   |
|                        | I have taken an international leisure trip in the past two years           | 38.0%   |

**Thank you.**