Travel Sentiment Survey

Findings Report

Wave 3: 4/28/20-4/30/20

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 27th, 2020 and March 31st, 2020 for Wave 1, between April 14th, 2020 and April 17th, 2020 for Wave 2, and between April 28th and April 30th, 2020 for Wave 3.
+ A total of 510 individuals in Wave 1, 505 individuals in Wave 2, and 500 individuals in Wave 3 completed the survey.

Key Insights &Implications

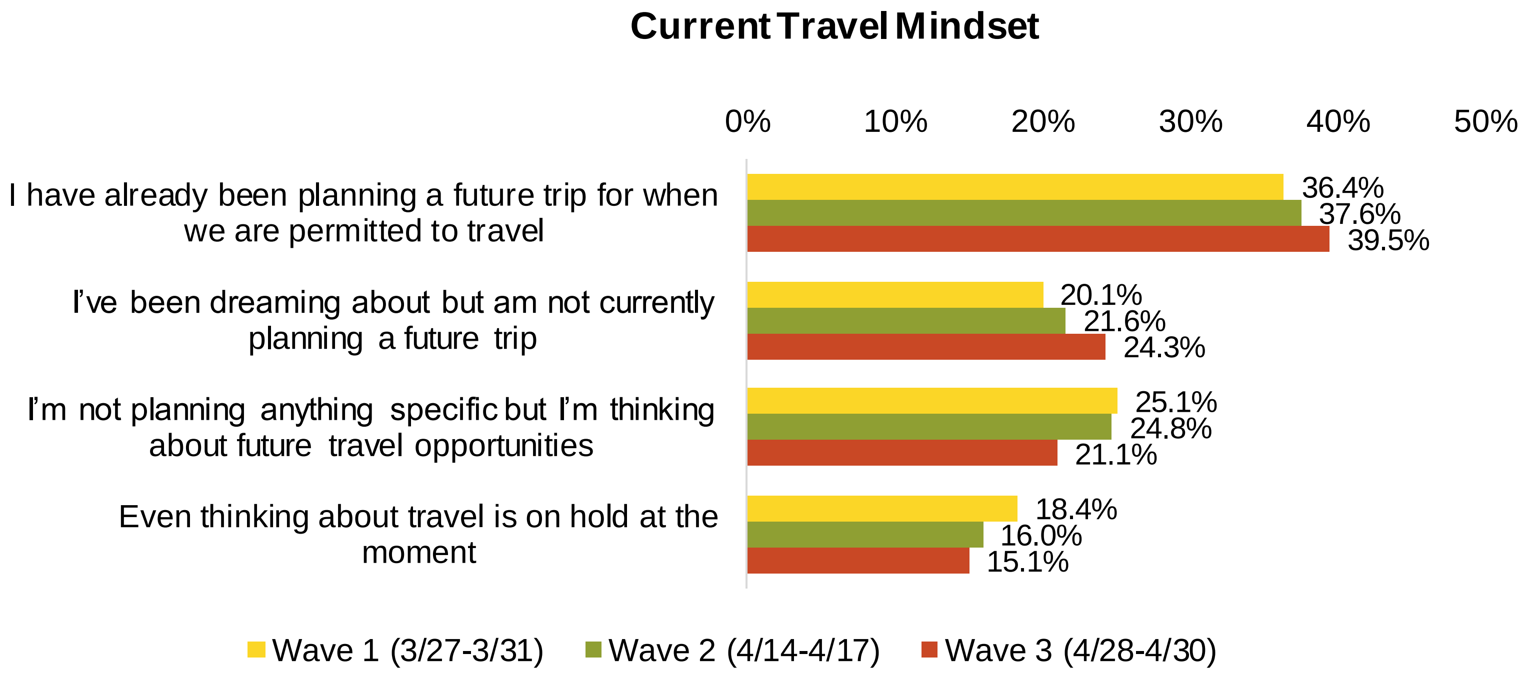
Insights & Implications

+ **Travel mindset holds steady even if the timeline shifts back.**
  - Travel mindset has remained consistent since late March. Just over 8 in 10 travelers are either planning a future trip, travel dreaming, or thinking about future travel opportunities.
  - The proportion of travelers who expect travel to be safe post-pandemic has held steady since wave 2, with half of travelers saying they expect it to be at least somewhat safe.
  - *Fewer* travelers now say they will not travel at all following the removal of travel restrictions.
  - Predictions of when travel restrictions will be lifted and when personal travel will begin are starting to spread into the fall.
+ **Travelers are starting to trust and look to destinations more for key travel indicators.**
  - The indicators that signal it is safe to travel again are changing and becoming more destination-centric: travelers will now be *less* influenced by a removal of travel restrictions from the U.S. government, and *more* influenced by seeing a decline of COVID-19 cases and/or deaths in their desired destination.
  - In terms of information sources while determining *where* and *when* it is safe to travel, travelers now say they will trust the U.S. government and news media outlets *less* and will instead rely on travel industry information sources, with a significant increase in those who say DMOs will be one of their most trusted sources.
+ **There has been a significant increase in travelers who say they like to see destination advertising during the pandemic.**
  - Travelers are mainly looking for destination advertising to convey a sense of normalcy, just under two-thirds say they would like to see ads that show people without masks or PPE.
  - Inspiration still plays a very key role in decision-making: U.S. travelers are fairly split on whether safety or inspiration will come first in destination decision making, with just over half saying they will think about where it is *safe to travel* first, and just under half saying they will think about where they are *inspired to go* first.
  - 7 in 10 travelers say they expect destinations to be just as they were before the pandemic or fairly similar, with most if not all businesses and attractions open.
+ **Parents are especially eager and optimistic around future travel.**
  - Compared to those without children, travelers with children in the household are more likely to say they will get back to normal travel behaviors quickly, are more likely to be currently planning a trip, and are more likely to expect destinations to be the same post-pandemic as they were pre-pandemic.

Detailed Findings

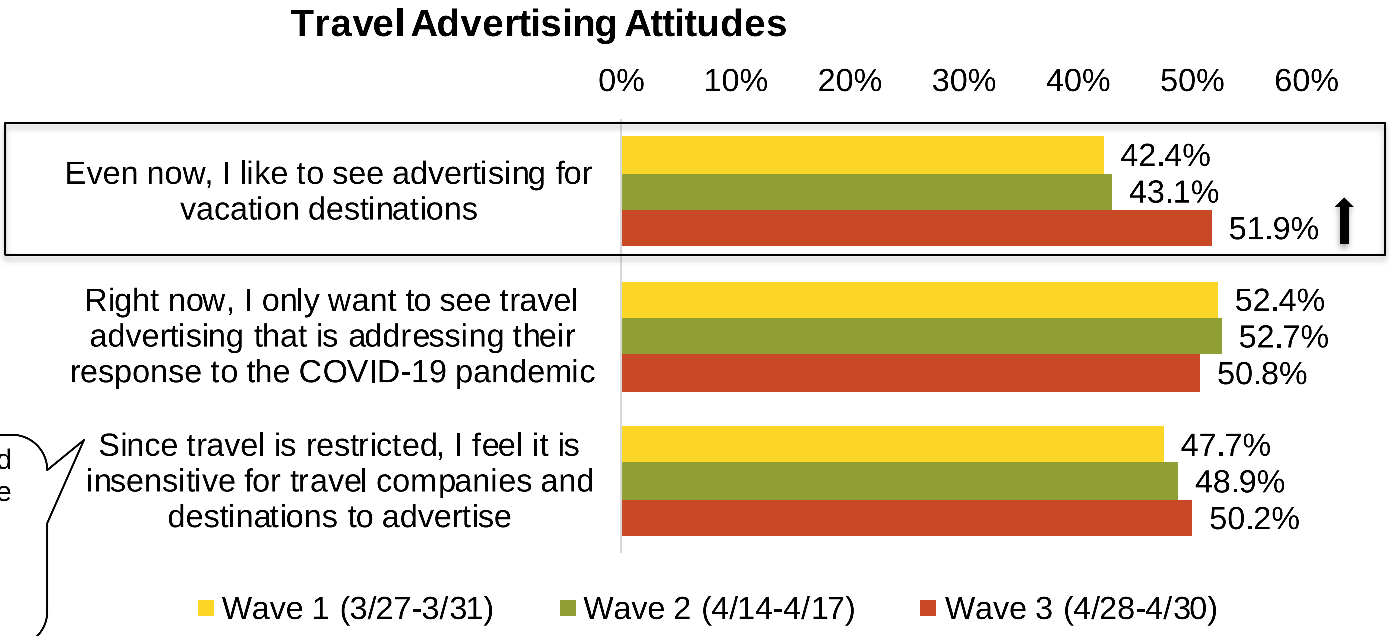
Current Travel Mindset & Attitudes

Travel mindset has remained consistent since late March. Just over 8 in 10 travelers are either planning a future trip, travel dreaming, or thinking about future travel opportunities.



Q7. Travel has been on hold during the COVID-19 pandemic but which of the following represents your current thinking about future leisure travel? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

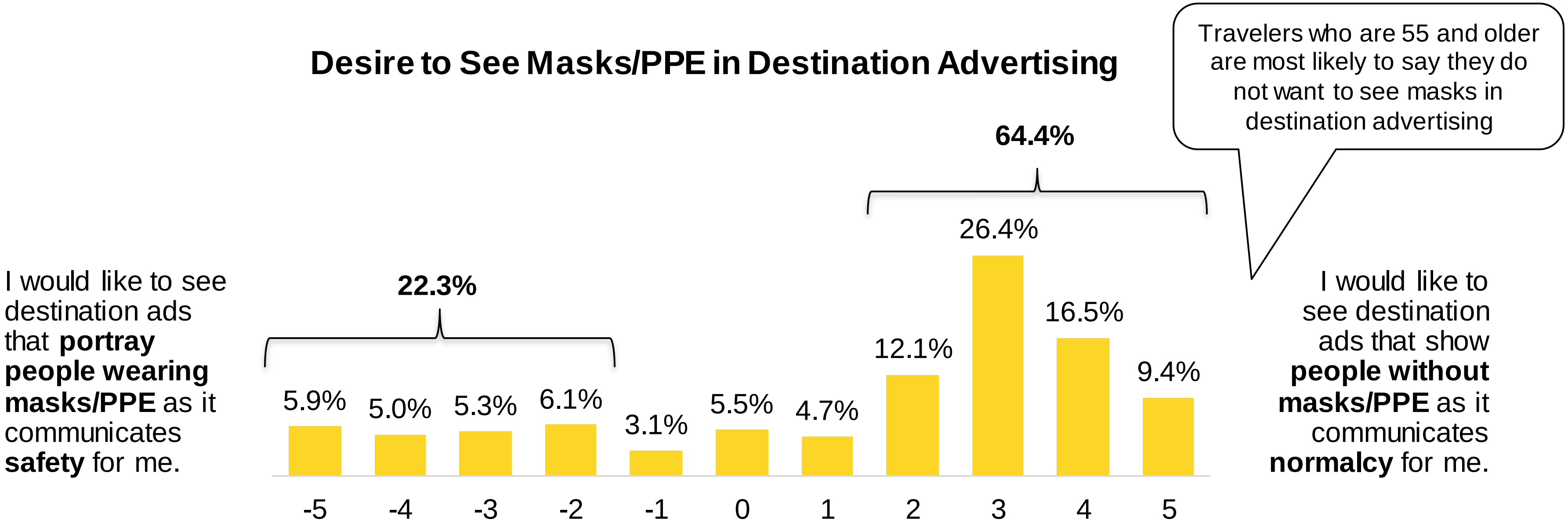
There was an increase in travelers who say they would like to see advertising for vacation destinations during the pandemic.



Compared to those 34 and younger, travelers who are 35 and older are more likely to **disagree** that travel advertising is insensitive right now

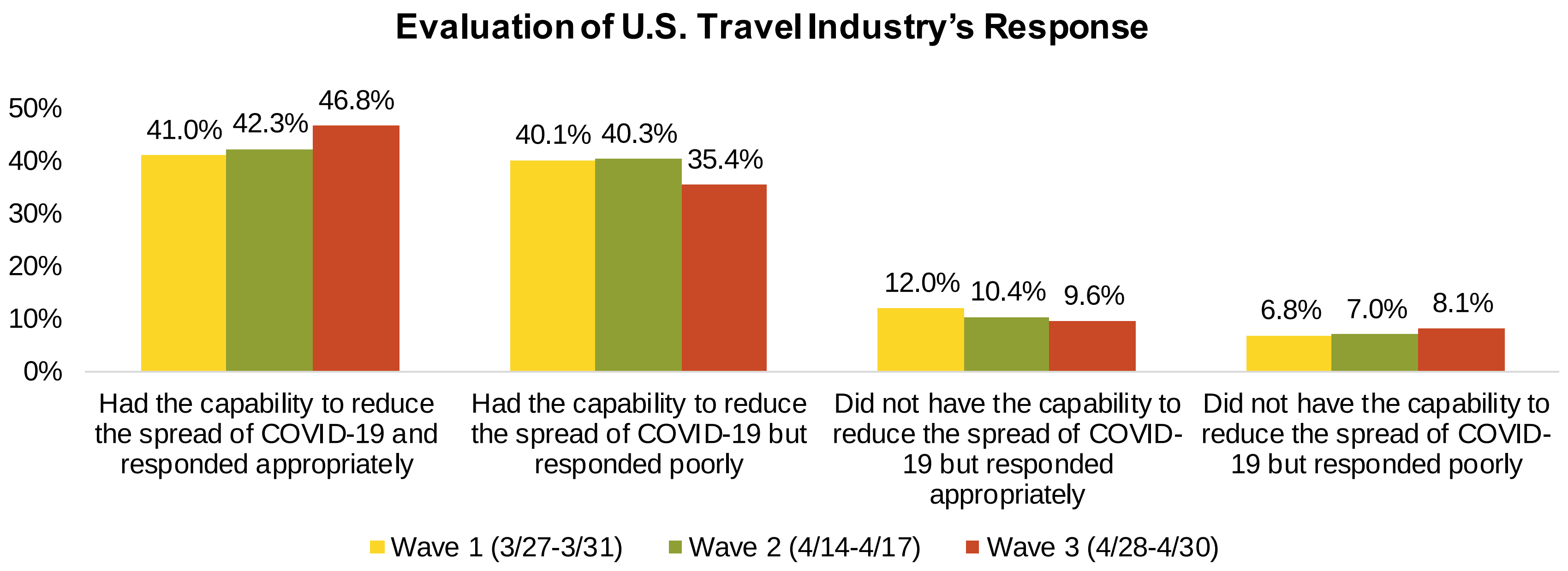
Q5. Indicate how much you agree or disagree with the following statements about the travel industry in the current climate.; Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

U.S. travelers are mainly looking for destination advertising to convey a sense of normalcy: just under two-thirds say they would like to see ads that show people without masks or PPE.



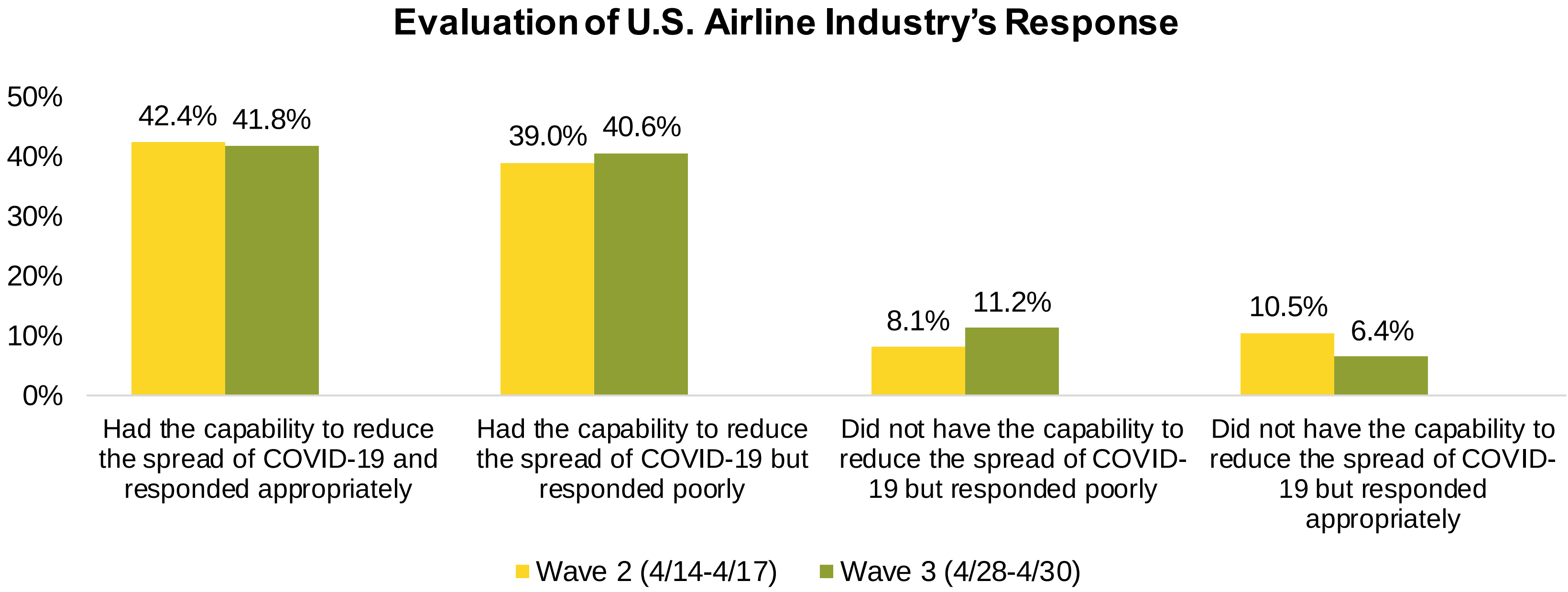
Q5b. We are interested in understanding, overall, which of the statements below best summarizes what is important to you in destination advertising. Using the slider, indicate where you fall between the two statements. If you feel one is much more representative of your own feelings, move the slider toward that statement to the appropriate degree. If you think your feelings are closer to the middle, place the slider closer to the middle. Wave 3; n=500

Travelers are moving towards viewing the travel industry more positively, with nearly half now believing the industry had the capability to reduce the spread of COVID-19 and responded *appropriately* compared to just over one-third who now believe the industry had the capability to reduce spread but responded *poorly*.



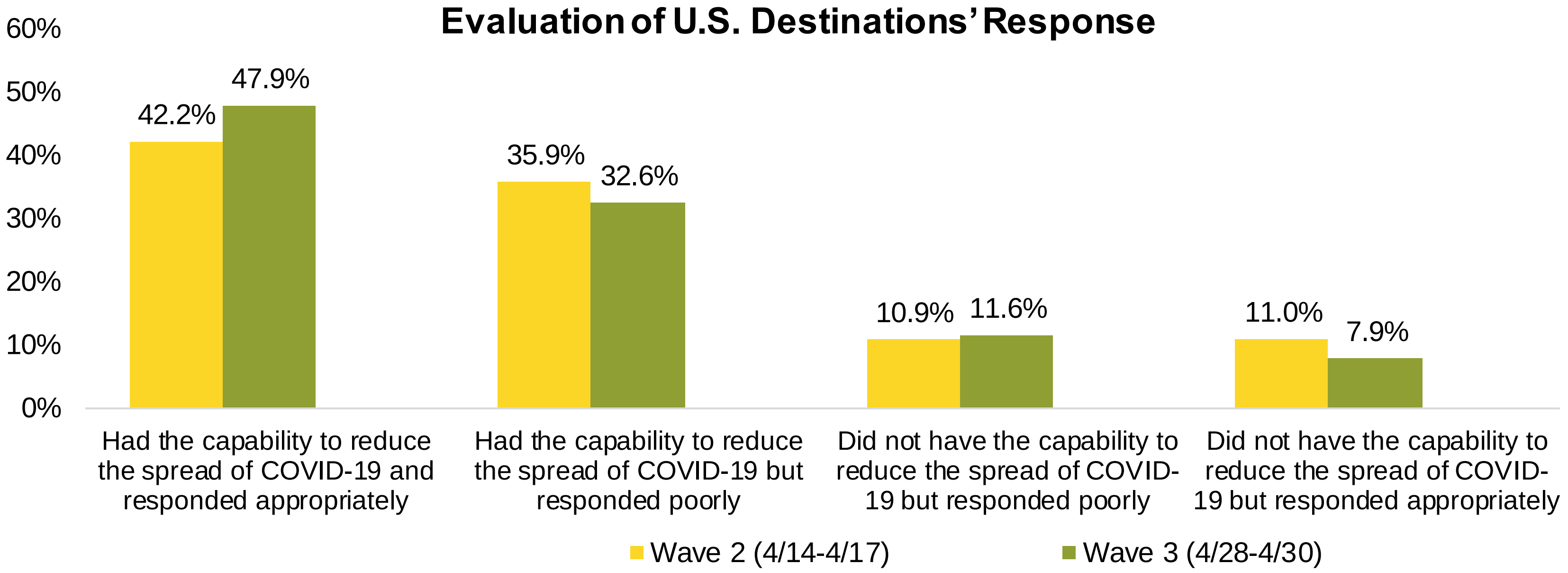
Q6. How did the U.S. travel industry respond to the spread of COVID-19? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

Travelers' evaluation of the U.S. airline industry's response has remained consistent wave-over-wave, with travelers agreeing the industry had the ability to reduce the spread but being split on whether the industry responded appropriately or not.



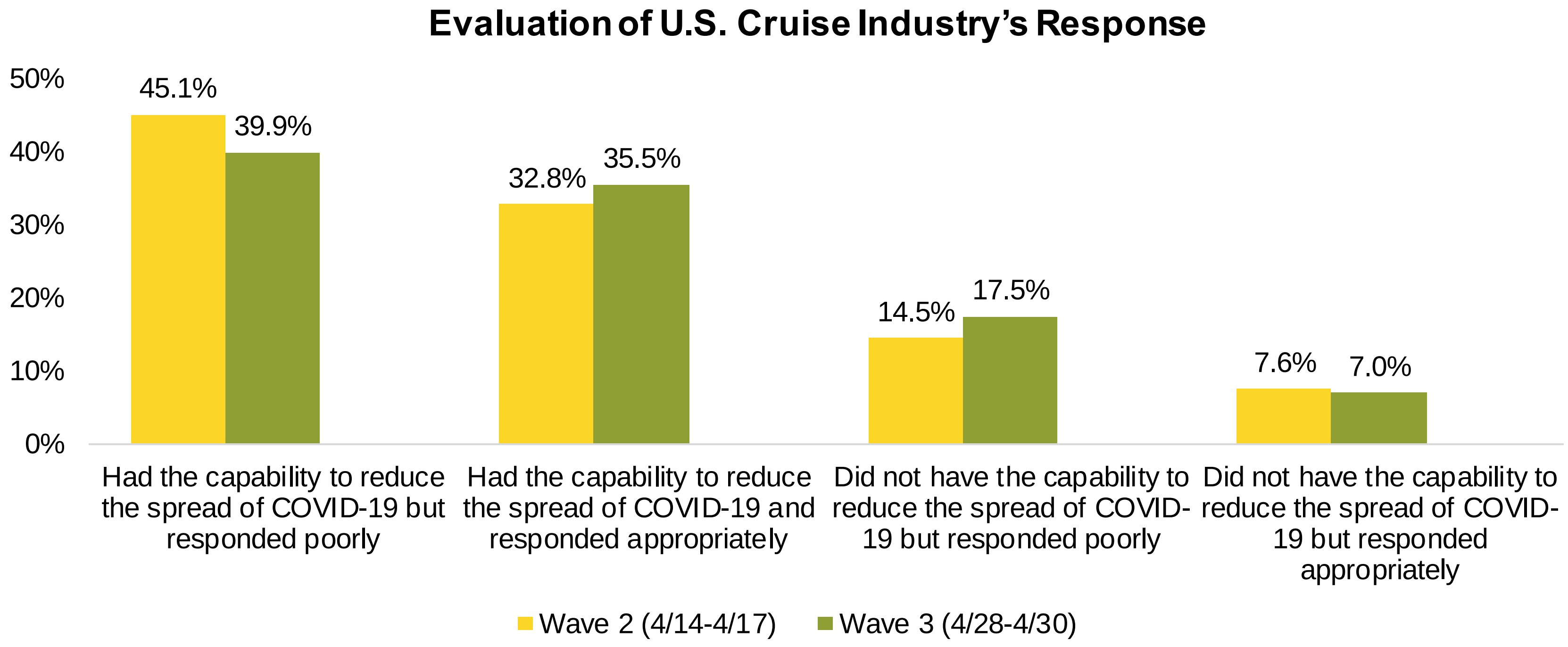
Q6b How did the U.S. airline industry respond to the spread of COVID-19? Wave 2 n=505, Wave 3 n=500

Travelers' evaluation of U.S. destinations' response to COVID-19 has remained consistent statistically but appears to be moving in a positive direction, with nearly half now saying destinations had the ability to reduce the spread and responded *appropriately*, compared to one-third who now say destinations had the ability to reduce spread but responded *poorly*.



Q6c. Overall, how did U.S. destinations respond to the spread of COVID-19? Wave 2 n=505, Wave 3 n=500

Travelers' evaluation of the U.S. cruise industry's response has remained fairly consistent wave-over-wave, with travelers agreeing the industry had the ability to reduce the spread but now being more split on whether the industry responded appropriately or not.



Q6d. How did the U.S. cruise industry respond to the spread of COVID-19? Wave 2 n=505, Wave 3 n=500

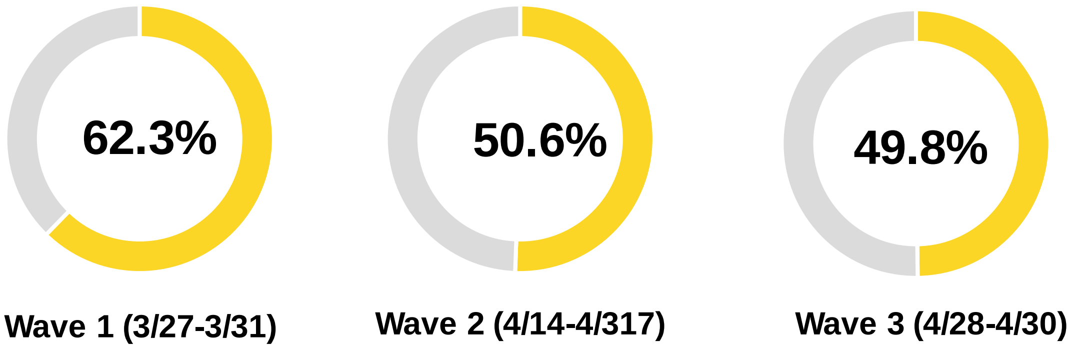
Decision-Making & Safety Considerations

U.S. travelers are fairly split on whether safety or inspiration will come first in destination decision-making, with just over half saying they will think about where it is *safe to travel* first, and just under half saying they will think about where they are *inspired to go* first.

Q8d. When it comes to selecting a vacation destination within the U.S. post-pandemic, which of the following statements best describes how you will go about your decision? Wave 3; n=500

After a decline between late March and mid-April in the perceived safety of U.S. travel, the proportion of travelers who expect travel to be safe post-pandemic has held steady, with half expecting it to be at least somewhat safe.

Perceive Travel As At Least Somewhat Safe



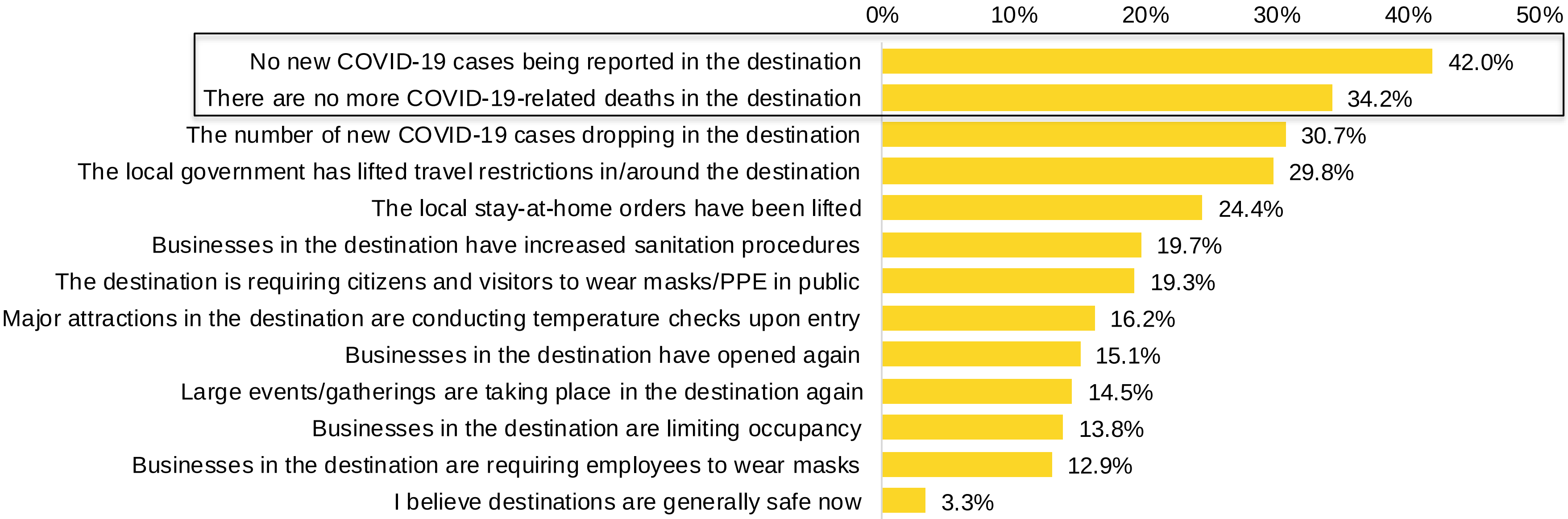
Q8. Thinking ahead, once the COVID-19 pandemic is over and the travel restrictions are lifted, how safe do you expect travel to be in the U.S.? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

The indicators that signal it is safe to travel again are changing: there was a decrease in the proportion of travelers who will be influenced by a removal of travel restrictions from the U.S. government, and an increase in those who will use a decline of COVID-19 cases and/or deaths in their desired destination as an indicator of safety.

Q8b Which of the following indicators will be the most influential in determining when you think it is safe to travel within the U.S. again? Indicate only those that will be most influential to your decision – up to three.; Wave 2 n=505, Wave 3 n=500

The two pieces of information that most signal to U.S. travelers that a *specific* destination is safe to visit are 1) no new COVID-19 cases being reported in the destination and 2) no more COVID-19-related deaths in the destination.

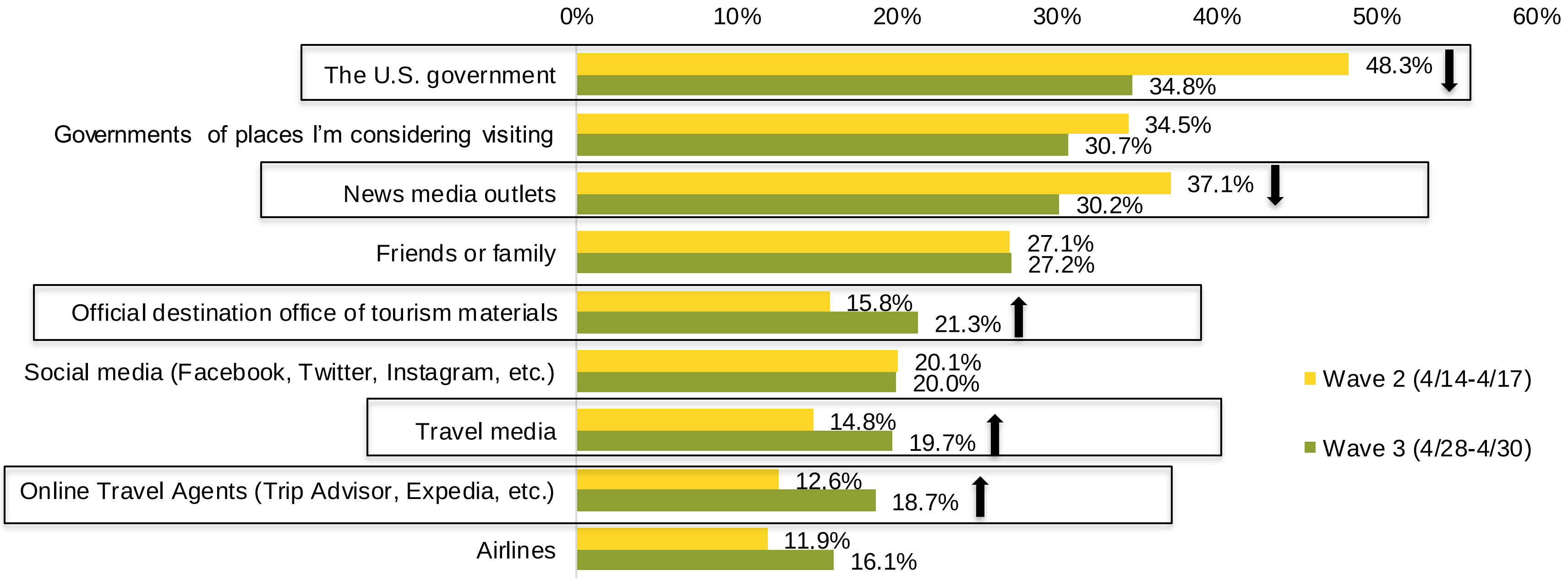
Most Important Information in Determining Destination Safety



Q8c. Which of the following pieces of information would be most important for you to see or hear in order to feel it is safe to visit a certain destination within the U.S.? Indicate up to four.

There has been a major shift in the information sources travelers will trust to determine *where* it is safe to travel. They will put less trust in the U.S. government and news media outlets, and instead will place more trust in the travel industry, specifically DMOs, travel media, and online travel agents.

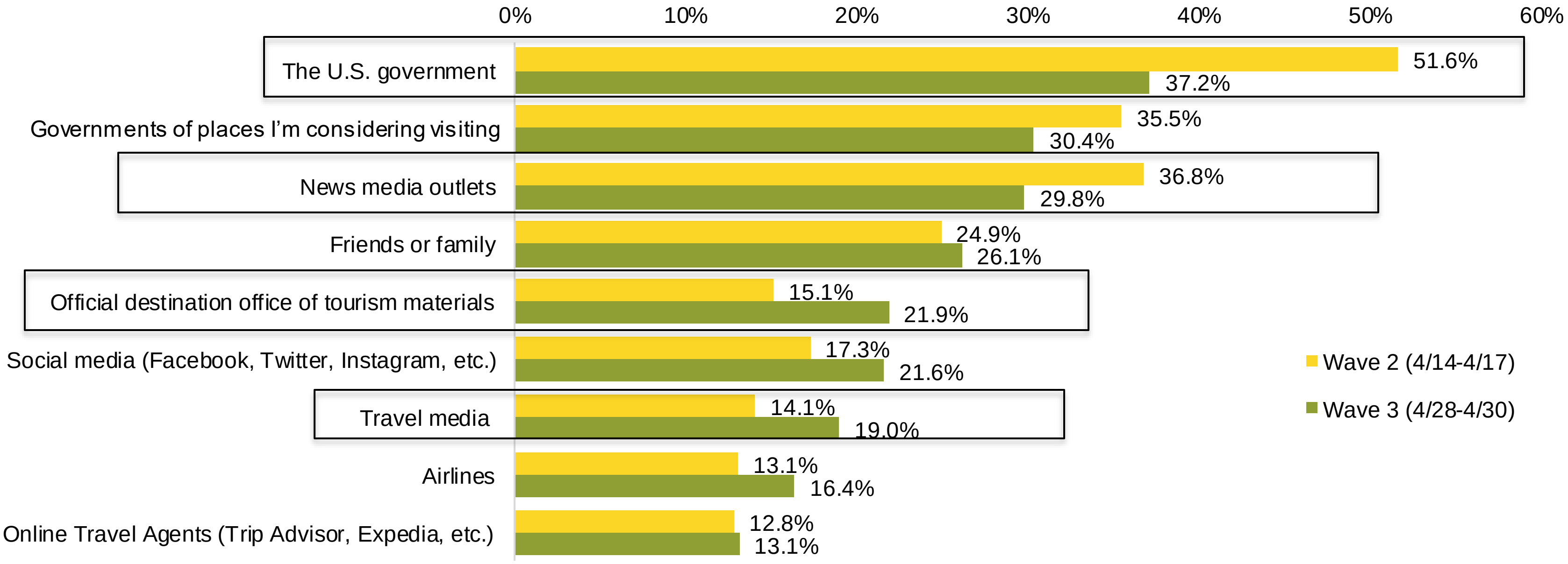
Trusted Information Sources For Determining *Where* It is Safe



Q18a When planning your next leisure travel, who will you most trust to provide information that will help you decide where it is safe to travel? (Please select up to three.) Wave 2 n=505, Wave 3 n=500

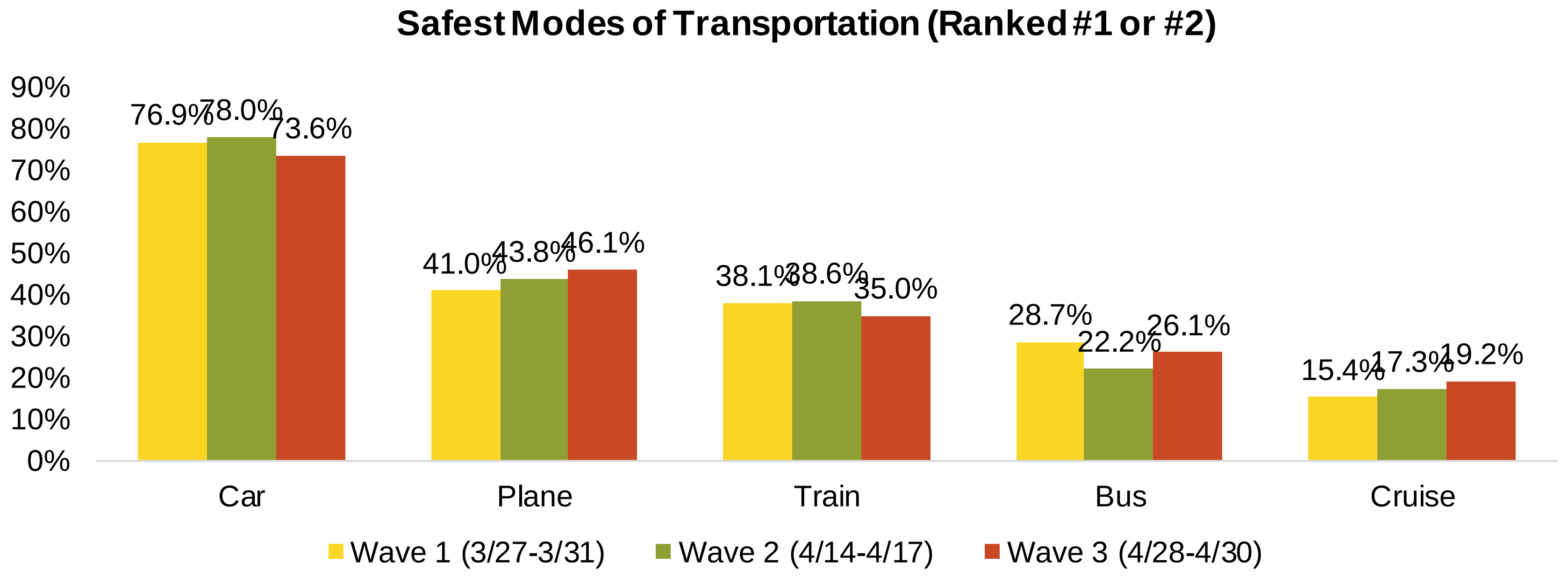
Similarly, there has been a major shift in the information sources travelers will trust when determining *when* it is safe to travel, with travelers trusting the U.S. government and news media outlets less and trusting DMOs and travel media more.

Trusted Information Sources For Determining *When* It is Safe



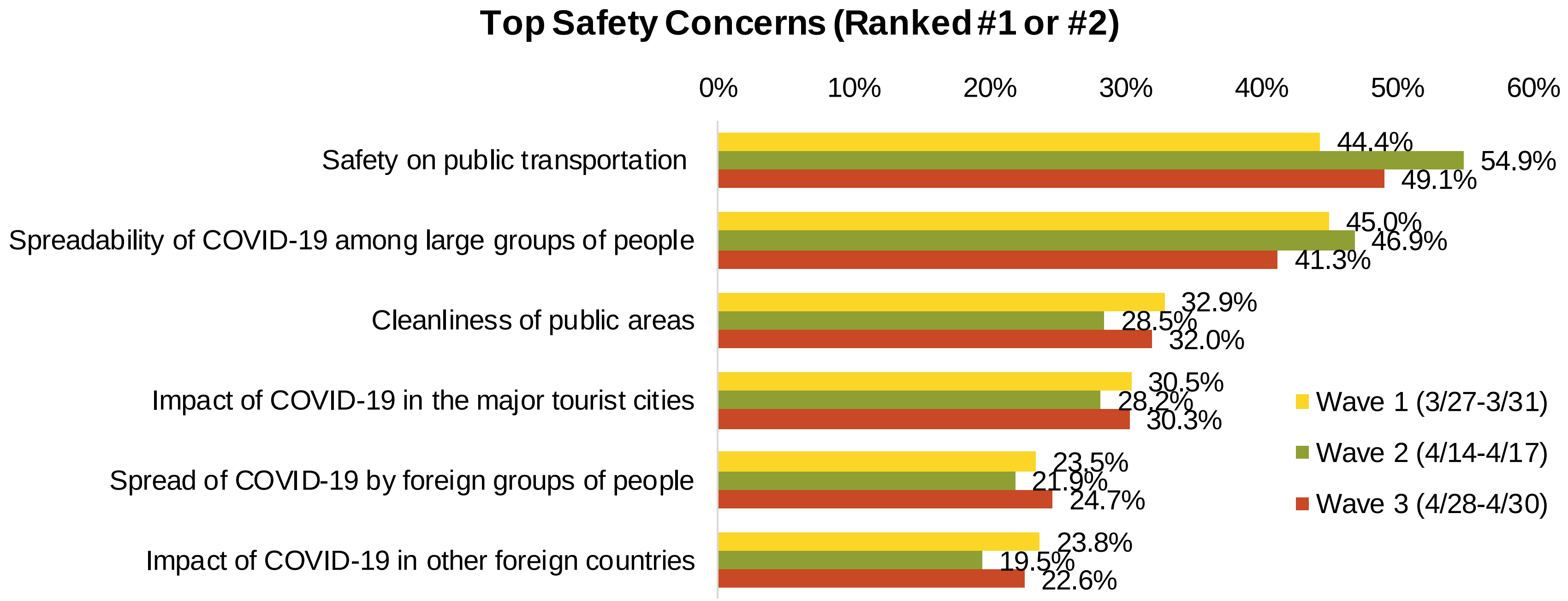
Q18b When planning your next leisure travel, who will you most trust to provide information that will help you decide when it is safe to travel? (Please select up to three.) Wave 2 n=505, Wave 3 n=500

The perceived safety of various types of transportation has stayed fairly steady, with the car still being the safest mode of transportation by far.



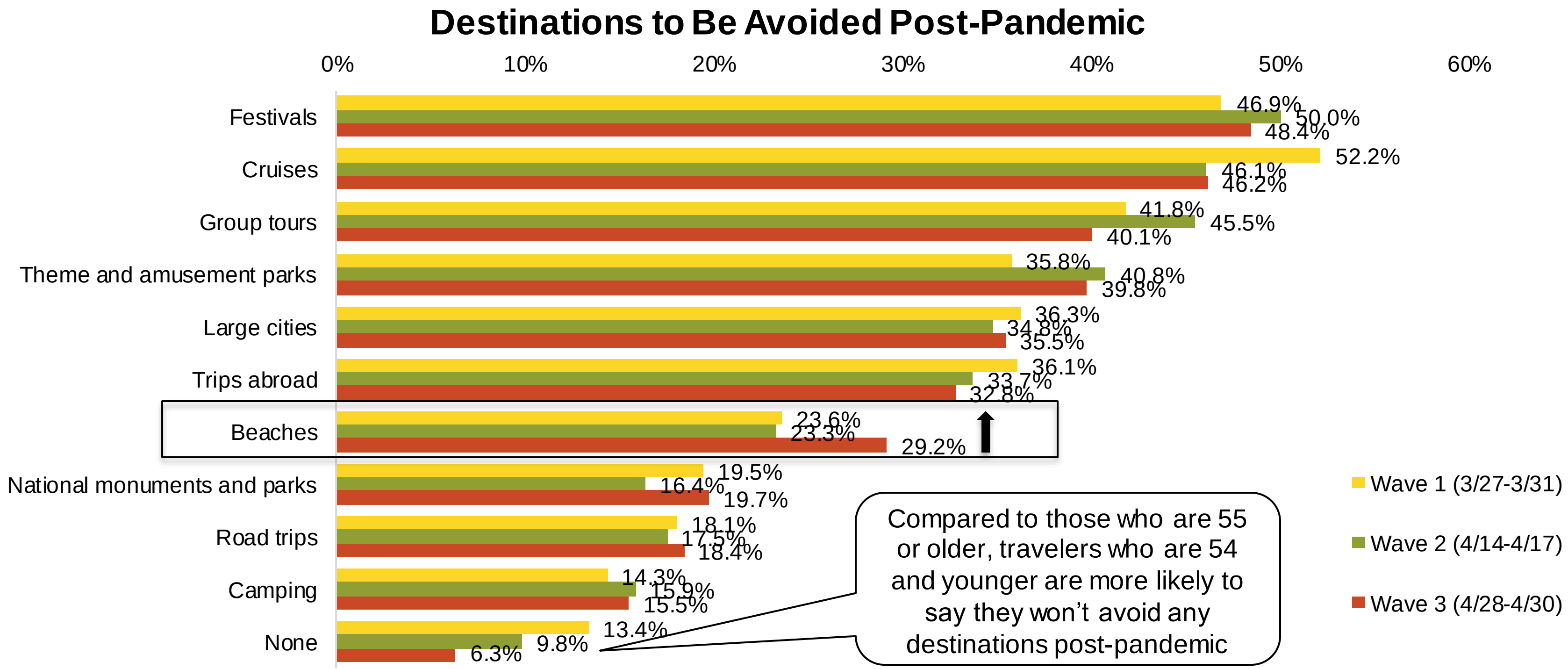
Q11.And still thinking about the time immediately following the pandemic, which modes of transportation will be the safest for traveling long distances? (Please click and drag to rank the listed selections below, where 1 = the most safe and 5 = the least safe) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

Safety on public transportation and spreadability of the virus in large groups of people have remained the top safety concerns since late March.



Q10. Ranked 1 or 2 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) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

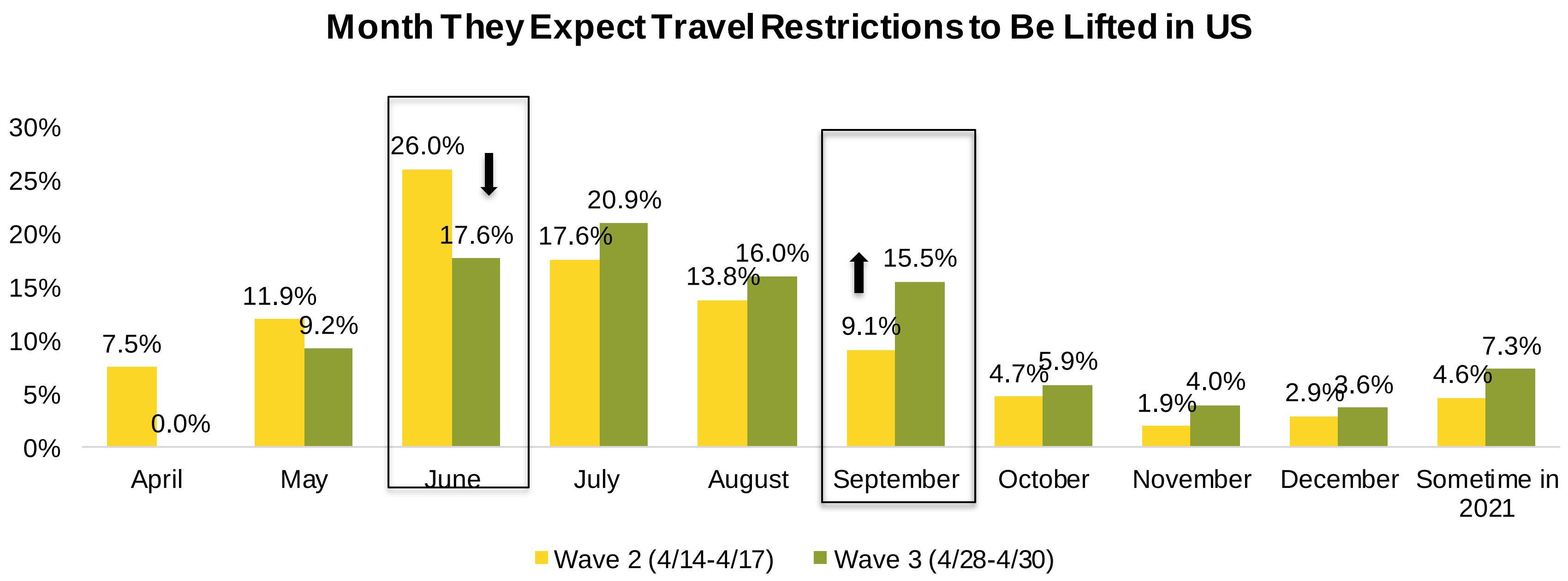
There was an increase in travelers wave-over-wave who say they will avoid traveling to beaches post-pandemic.



Q14. If any, what types of places are you going to avoid traveling to in the U.S. after the COVID-19 pandemic? (Select all that apply); Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

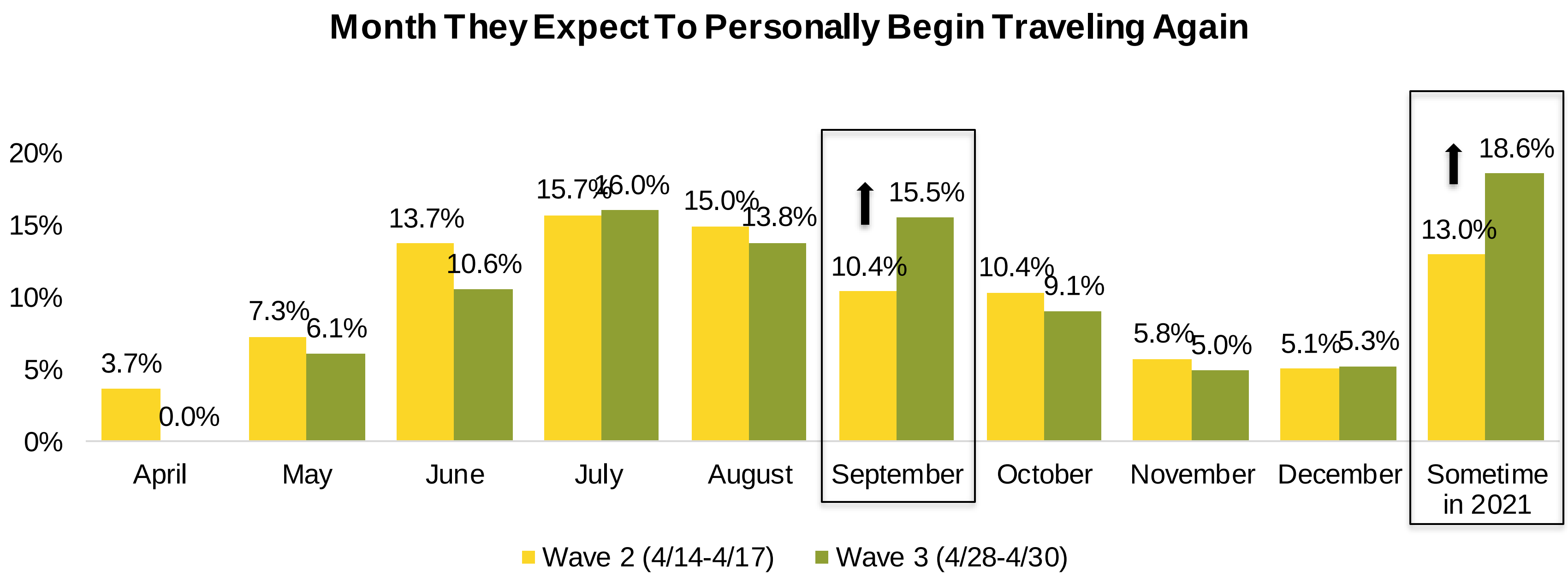
Traveling Post-Pandemic

Travelers' predictions of when the travel restrictions will be lifted are spreading into the fall. Significantly fewer travelers believe travel restrictions will be lifted in June, and significantly more believe restrictions will be lifted in September.



Q17b. At this point, during which month do you expect the travel restrictions to be lifted within the U.S.? Wave 2 n=505, Wave 3 n=500

More travelers are now saying they expect to begin traveling again in September, and now nearly 2 in 10 say they will wait until 2021 to begin traveling.



 Q17c. During which month do you personally expect to start traveling within the U.S. again? Wave 2 n=505, Wave 3 n=500

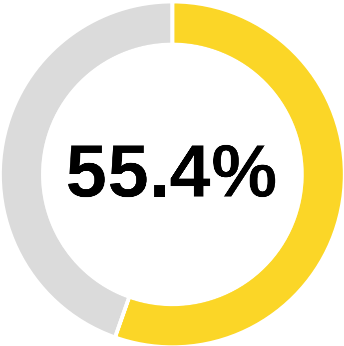
The decrease seen from late March to mid-April in the proportion of consumers who say they will get back to travel behaviors within a few weeks was not sustained in Wave 3. That said, a significant increase in those who will wait a year or more to resume travel behaviors has been sustained since mid-April.

How Quickly They Will Return to U.S. Travel	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505	Wave 3 (4/28-4/30) C n = 500
Top 3 Box	45.7% B	38.5%	41.4%
Top 2 Box	24.9% BC	18.4%	17.4%
Immediately	10.0%	9.7%	5.6%
After a few days	14.9% B	8.7%	11.8%
A few weeks	20.7%	20.1%	24.0%
About a month	20.0%	18.0%	20.5%
A few months	28.9%	33.8% AC	27.2%
A year	3.7%	7.4% A	7.7% A
More than a year	1.7%	2.4%	3.3%
Bottom 2 Box	5.4%	9.8% A	11.0% A
Bottom 3 Box	34.3%	43.6% A	38.2%

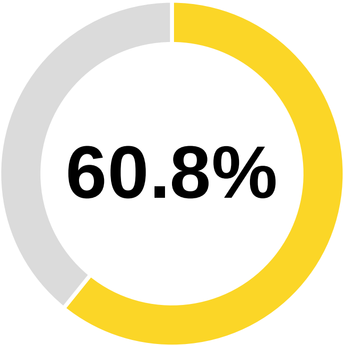
Q17. After the official "all clear" is given by government, how quickly do you expect to return to your normal behaviors regarding travel within the U.S.?
Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

There was an increase from late March to late April in the proportion of travelers who say they will be traveling less for leisure post-pandemic.

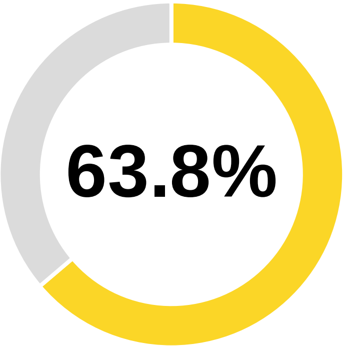
I will be traveling less often for leisure post-COVID-19



Wave 1 (3/27-3/31)



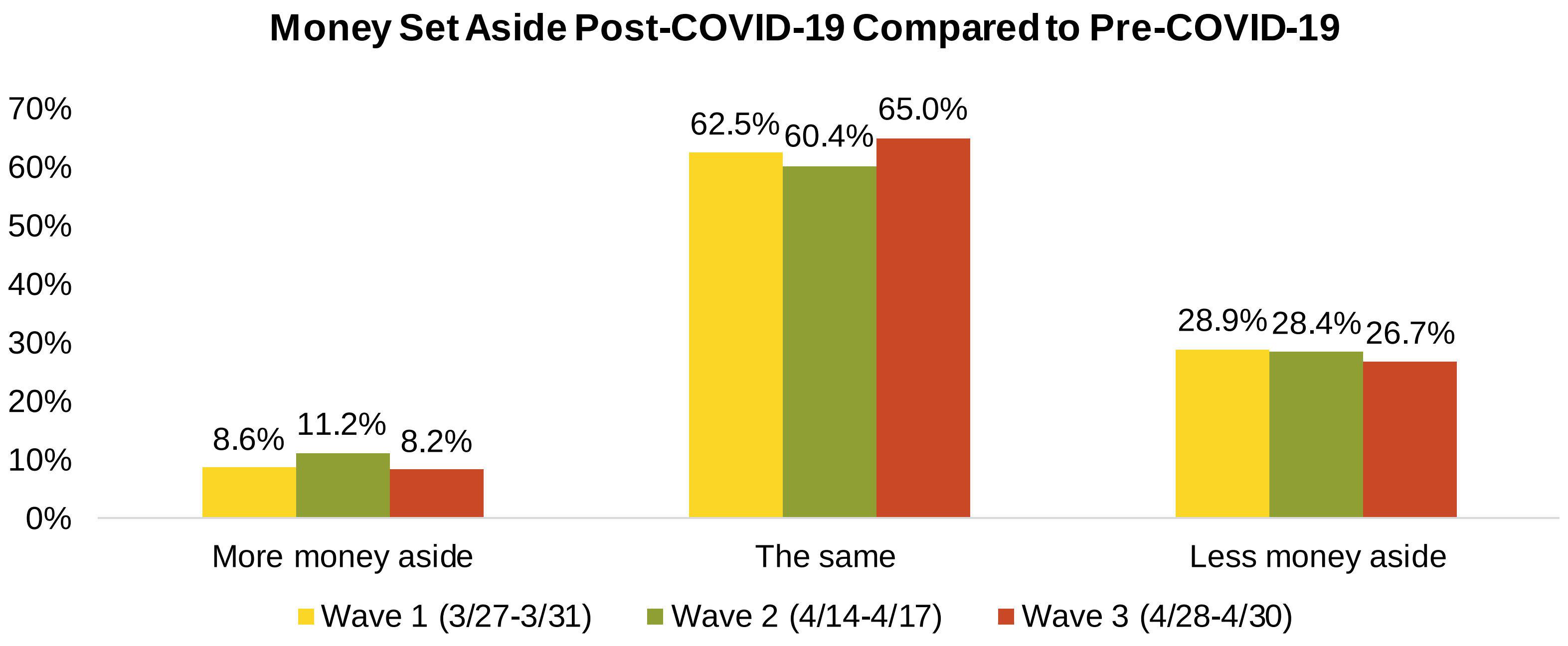
Wave 2 (4/14-4/317)



Wave 3 (4/28-4/30)

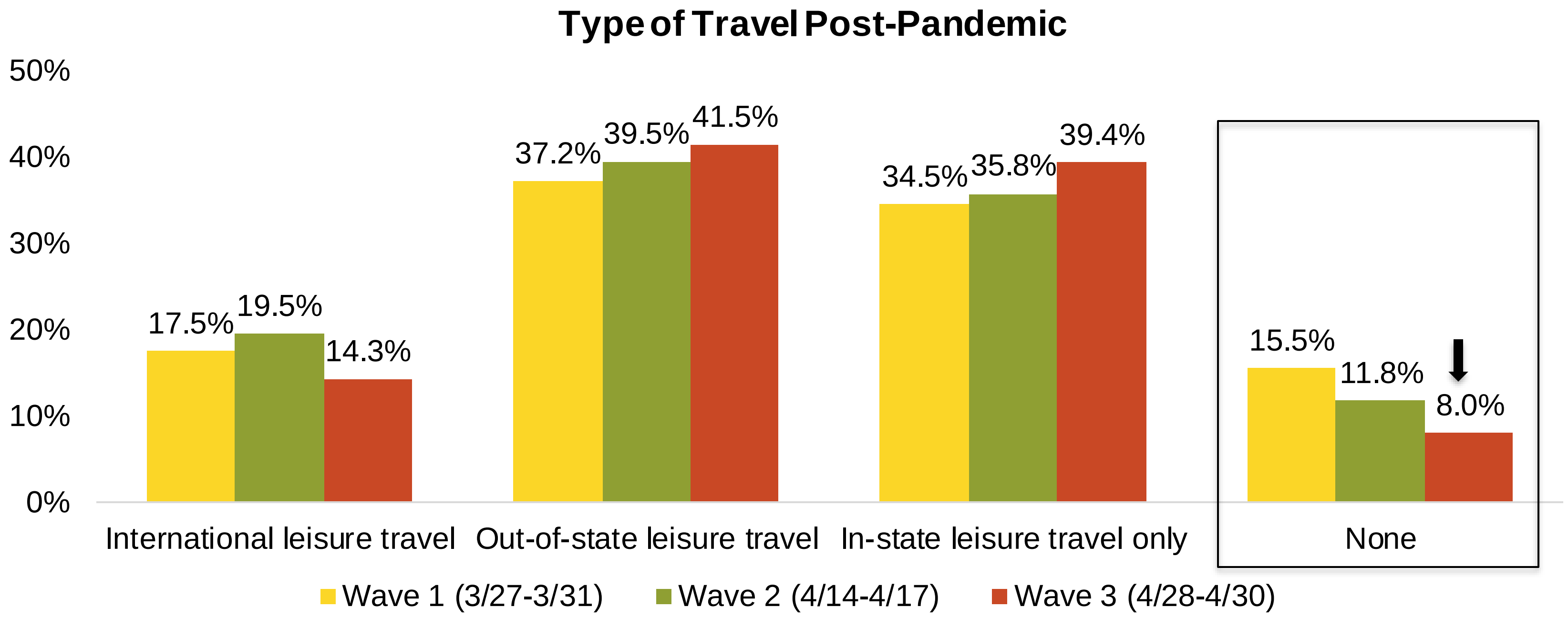
Q12. Longer term, as a result of the COVID-19 pandemic, which of the following do you anticipate for your own leisure travel within the U.S., compared to before the pandemic?; Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

Despite travelers saying they will take less leisure trips, two-thirds say they will set aside the same amount of money for travel post-COVID-19 as they would have before the pandemic, consistent with previous waves.



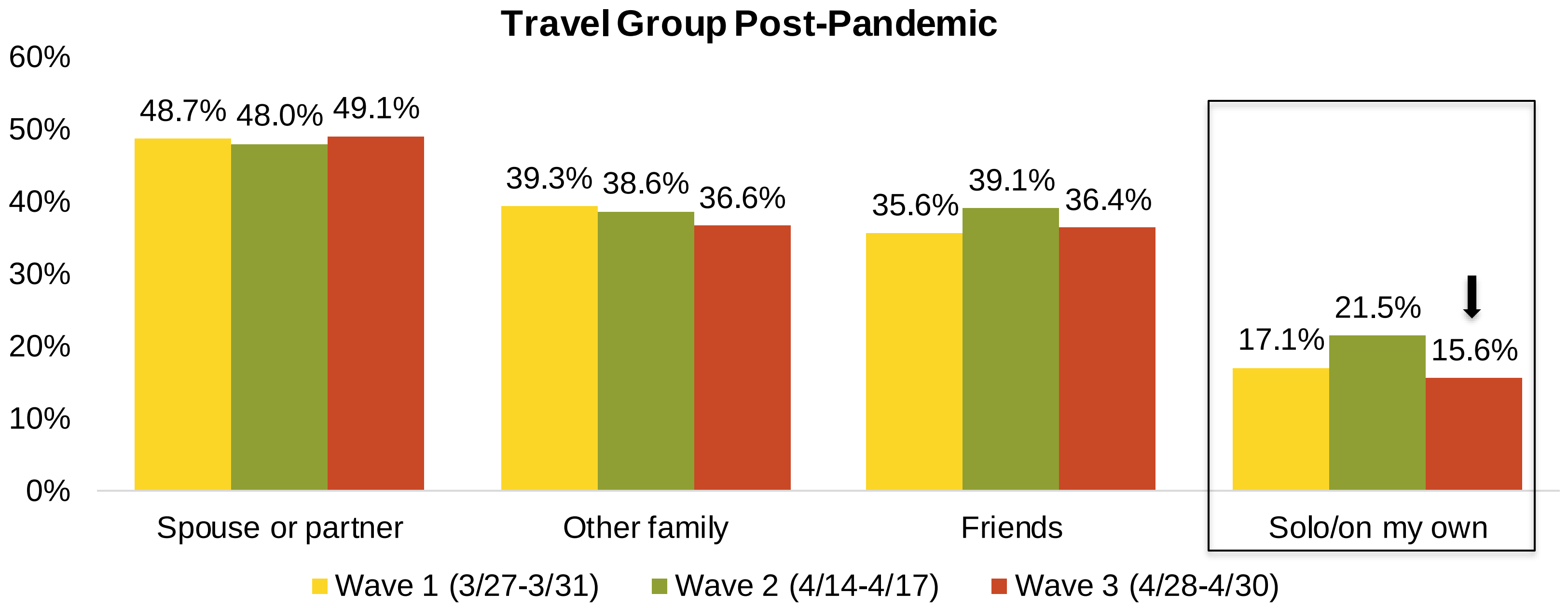
Q13. Once the COVID-19 pandemic is past, do you expect to set aside more, the same, or less money for your leisure travel in the U.S., compared to before the pandemic? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

The types of travel that travelers will engage in immediately after restrictions are removed has remained consistent wave-over-wave. Notably, there was a decrease from late March to late April in the amount of travelers who say they won't travel immediately after restrictions removed.



Q9. Immediately following the removal of travel restrictions, what type of leisure-travel would you do? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

There was a decrease since mid-April in the proportion of travelers who say they are looking forward to traveling alone post-pandemic.



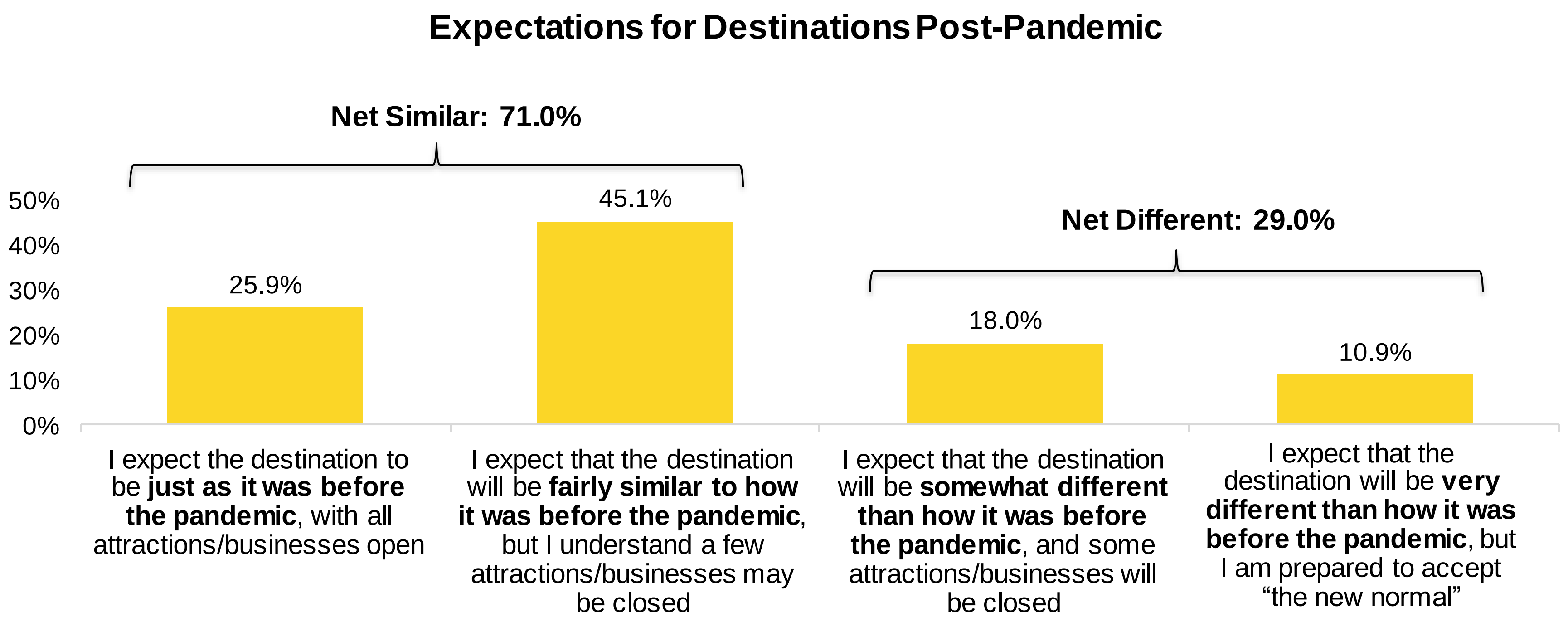
Q16. When travel restrictions are lifted and you take that first vacation post-COVID-19, who are you most looking forward to spending the time with? (Indicate all that apply.) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

The decrease in the proportion of travelers looking forward to a family getaway has been sustained since mid-April, and there has been an increase from late March to late April in the proportion of travelers who are looking forward to an organized group tour.

Trip Types Looking Forward To Post-Pandemic	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505	Wave 3 (4/28-4/30) C n = 500
Visiting friends and family	42.9%	41.1%	37.3%
Road trip	34.5%	33.7%	30.5%
Family getaway	38.0% BC	28.4%	28.5%
Beach getaway	28.3%	27.2%	24.1%
Outdoor adventure (e.g., hiking, camping, fishing)	23.7%	19.4%	23.5%
Small-town getaway	19.8%	17.9%	15.9%
Remote/rural destinations	20.5%	17.2%	17.9%
Big city experience	17.4%	16.9%	15.9%
All-inclusive resort vacation	12.2%	14.9%	12.9%
A special event vacation (e.g., concerts, festival, or sporting events)	15.1%	14.7%	16.0%
Staycation	13.8%	14.0%	12.6%
Luxury experiences	14.7%	13.7%	13.8%
Wandering (i.e., backpacking across a large geographic area of society)	10.2%	10.5%	12.9%
Thrill seeking (e.g., skiing, hang gliding, jet-skiing)	7.6%	9.9%	11.4%
Spiritual experience (e.g., self-discovery, yoga retreats, meditation, seeking sage wisdom)	8.7%	9.2%	12.1%
All-inclusive packaged holiday	8.0%	8.6%	9.4%
An organized group tour(s)	6.6%	6.9%	11.0% A

Q15b. 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.) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500

U.S. travelers expect U.S. destinations to be largely the same post-pandemic: 7 in 10 travelers say they expect destinations to be just as they were before the pandemic or fairly similar, with most if not all businesses and attractions open.



Q17d Which of the following best describes your expectations for a destination you are considering visiting within the U.S. post-pandemic? Wave 3; n=500

Family Travel Spotlight

Parents are eager to get back to travel and to resume normalcy. Compared to those without children, travelers with children in the household are more likely to say they will get back to normal travel behaviors quickly, are more likely to be currently planning a trip, less likely to want to see masks in destination advertising, and are more likely to expect destinations to be the same post-pandemic as they were pre-pandemic.

Will Get Back to Normal Travel Behaviors Within a Few Weeks

49.9% Parents vs. 32.5% Non-Parents

Will Wait Until 2021 to Resume Travel

11.7% Parents vs. 25.8% Non-Parents

Are Currently Planning a Future Trip

47.7% Parents vs. 30.9% Non-Parents

Expect Destinations to Be As They Were Pre-Pandemic or Fairly Similar

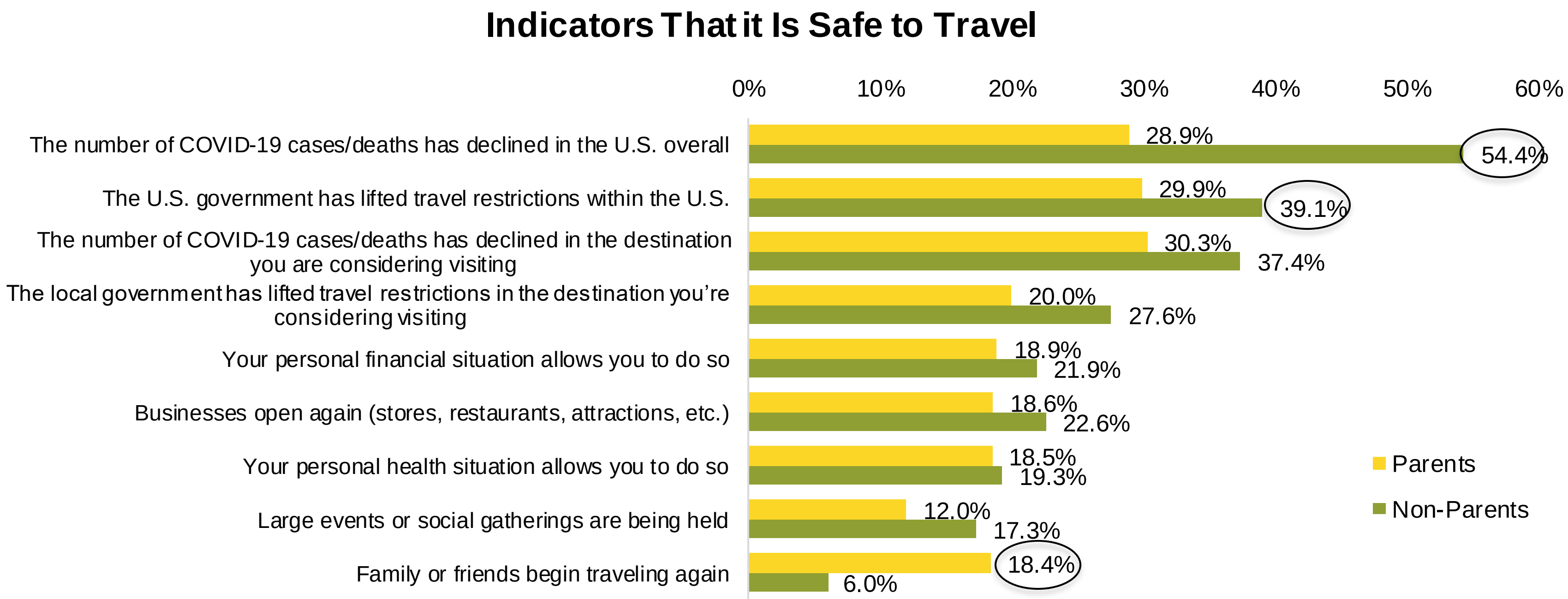
79.8% Parents vs. 61.9% Non-Parents

Want to See Masks in Destination Advertising

15.1% Parents vs. 36.0% Non-Parents

Various questions ; Wave 3 n=500

When determining when it is safe to travel again, parents are *less* likely to be influenced by the number of COVID-19 cases/deaths declining in the U.S. or the U.S. government lifting travel restrictions and are *more* likely to be influenced by friends and family traveling again.



Q8b - Which of the following indicators will be the most influential in determining when you think it is safe to travel within the U.S. again? Indicate only those that will be most influential to your decision – up to three. - Other (specify) - Text; Wave 3 n=500

Parents are more likely to rank planes and cruises as some of the top safest modes of transportation and are less likely to avoid a host of trip types post-pandemic like festivals, cruises, group tours, theme parks, and trips abroad. Notably, parents are more likely to say they will avoid road trips post-pandemic.

Ranks Plane as #1 or #2 Safest Transportation Mode

51.0% vs. **40.9%**

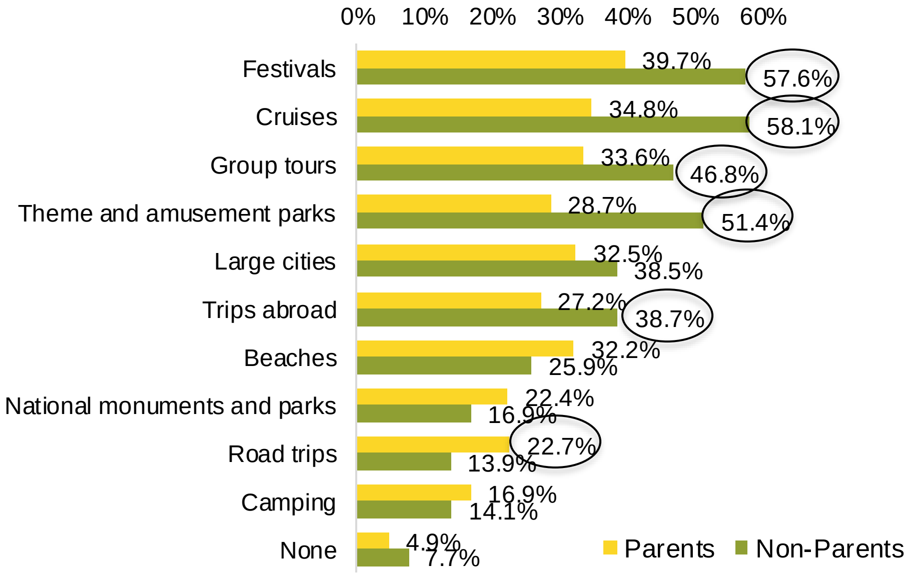
Parents Non-Parents

Ranks Cruise as #1 or #2 Safest Transportation Mode

25.5% vs. **12.7%**

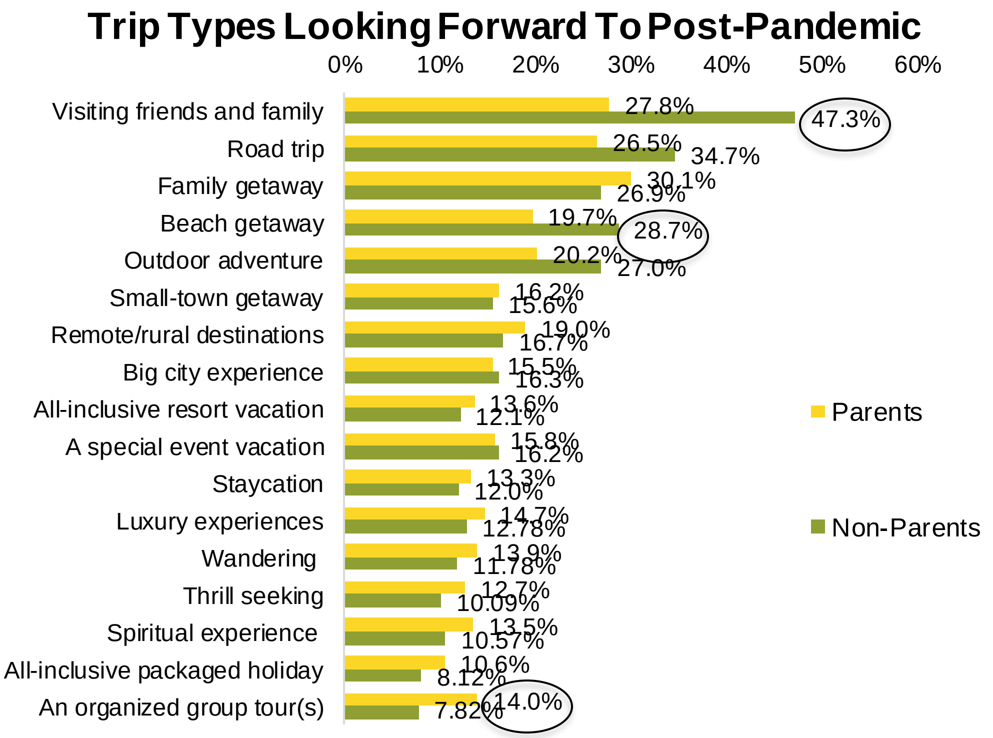
Parents Non-Parents

Destinations to Be Avoided Post-Pandemic



Q14. If any, what types of places are you going to avoid traveling to in the U.S. after the COVID-19 pandemic? (Select all that apply)
Q11. 1 or 2 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) Wave 3 n=500

While parents are less likely to be looking forward to visiting friends and family and taking a beach getaway post-pandemic, they are more likely to be looking forward to an organized group tour.



Q15b. 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.) Wave 3 n=500

Appendix

Participant Profile

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)
Age	18-24	13.7%	13.9%	14.0%
	25-34	28.6%	28.3%	29.8%
	35-44	11.6%	12.3%	11.2%
	44-54	18.0%	19.8%	19.0%
	55-64	19.2%	17.8%	18.0%
	65-74	8.2%	6.9%	7.0%
	75 or older	0.6%	1.0%	1.0%
	Mean	42.4	42.1	41.9
	Median	39.5	39.5	39.5
Gender	Male	53.9%	54.5%	55.0%
	Female	45.3%	43.2%	42.8%
	Other	0.8%	2.2%	2.2%
Income	Under $35,000	15.7%	15.0%	15.6%
	$35,000-$49,999	22.5%	23.6%	23.4%
	$50,000-$74,999	19.6%	19.8%	20.0%
	$75,000-$99,999	17.6%	17.8%	17.4%
	$100,000-$149,999	14.9%	14.3%	15.8%
	$150,000-$199,999	4.9%	5.9%	4.2%
	$200,000-$249,999	2.2%	1.4%	0.6%
	$250,000 or more	2.4%	1.6%	1.6%
	Prefer not to answer	0.2%	0.6%	1.4%
	Mean	$78,707.80	$76,767.50	$74,289.60
	Median	$62,499.50	$62,499.50	$62,499.50

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)
U.S. Region	Northeast	14.7%	15.2%	12.4%
	Midwest	15.5%	13.3%	15.2%
	South	40.8%	37.8%	39.0%
	West	29.0%	33.5%	32.6%
Income	Married	64.7%	60.0%	67.2%
	Single, never married	24.7%	30.3%	23.6%
	Divorced	6.1%	7.7%	6.0%
	Widowed	2.7%	1.2%	1.4%
	Separated	1.0%	0.4%	0.8%
	Other (specify)	0.8%	0.4%	1.0%
Education	High school diploma or GED	5.9%	7.7%	5.8%
	Trade or technical school certificate	4.3%	3.0%	2.4%
	Associate Degree	11.4%	8.7%	7.4%
	Some college	6.9%	10.7%	9.2%
	Bachelor's degree	55.7%	51.9%	57.8%
	Graduate degree	15.9%	18.0%	17.4%
Employment Status	Work full time	74.9%	72.7%	74.8%
	Work part time	7.8%	8.3%	10.0%
	Self-employed	7.6%	8.1%	8.2%
	Retired	5.3%	6.7%	5.2%
	Student	3.1%	2.6%	2.6%
	Homemaker	1.8%	2.0%	2.2%
	Unemployed, looking for work	1.57%	3.2%	2.8%

Various questions, unweighted data shown

Participant Profile (cont.)

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)
Presence of Children	Yes	49.0%	43.6%	49.8%
	No	51.0%	56.4%	50.2%
Travel in Past 2 Years	Has Taken A Domestic Leisure Trip	83.9%	84.4%	82.4%
	Has Taken an International Leisure Trip	38.0%	38.6%	37.8%

Various questions, unweighted data shown

Thank you.