Travel Sentiment Survey

Results Report

Wave 4: 5/15/20-5/18/20

bvk

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.

Wave	n	Date
Wave 1	n=510	3/27-3/31
Wave 2	n=505	4/14-4/17
Wave 3	n=500	4/28-4/30
Wave 4	n=506	5/15-5/18

Summary of Key Findings

Insights & Implications

+ **Travel mindset improves despite increasing safety concerns and behavior changes.**
    - About 9 in 10 are now thinking about travel in some sense, and many have taken steps towards planning a future trip, such as narrowing down destinations, selecting a destination, and setting travel dates.
    - The proportion of consumers who perceive travel in the U.S. to be safe post-pandemic is slowly *decreasing*.
    - There was an *increase* in those who say they will wait more than a year to get back to travel behaviors. Travelers' predictions of when they will begin traveling again are moving further out from summer, with an *increase* in those who say they will begin traveling in the fall or begin in 2021.
    - There has been a steady *increase* since the end of March in those who say they will be traveling less often for leisure post-pandemic.
    - While desire for out of state travel has held steady, there has been a *decrease* in travelers who say they will engage in international travel, and an *increase* in those who say they will engage in in-state travel only.
+ **Travelers are increasingly seeing the travel industry and destinations in a positive light.**
    - More travelers now feel the overall U.S. travel industry and U.S. destinations had the ability to reduce the spread of COVID-19 and responded *appropriately,* with fewer saying they responded poorly.
    - There was a *decrease* in those who feel it would be insensitive for destinations and travel companies to advertise at this time.
+ **Travelers remain split on whether safety or inspiration will come first in destination decision-making.**
    - Just under half say they will think about where it is safe to travel first, and just under half say they will think about where they are inspired to go first.
+ **Indicators of when/where it will be safe to travel as well as determining a destination's safety continue to shift.**
    - Fewer travelers will now view the local government lifting travel restrictions as an indicator of destination safety. There was an increase in travelers who will view businesses opening in the destination again as an important safety indicator.
    - Travelers increasingly look to friends & family, social media, online travel agents and travel media for determining where/when it's safe to travel.

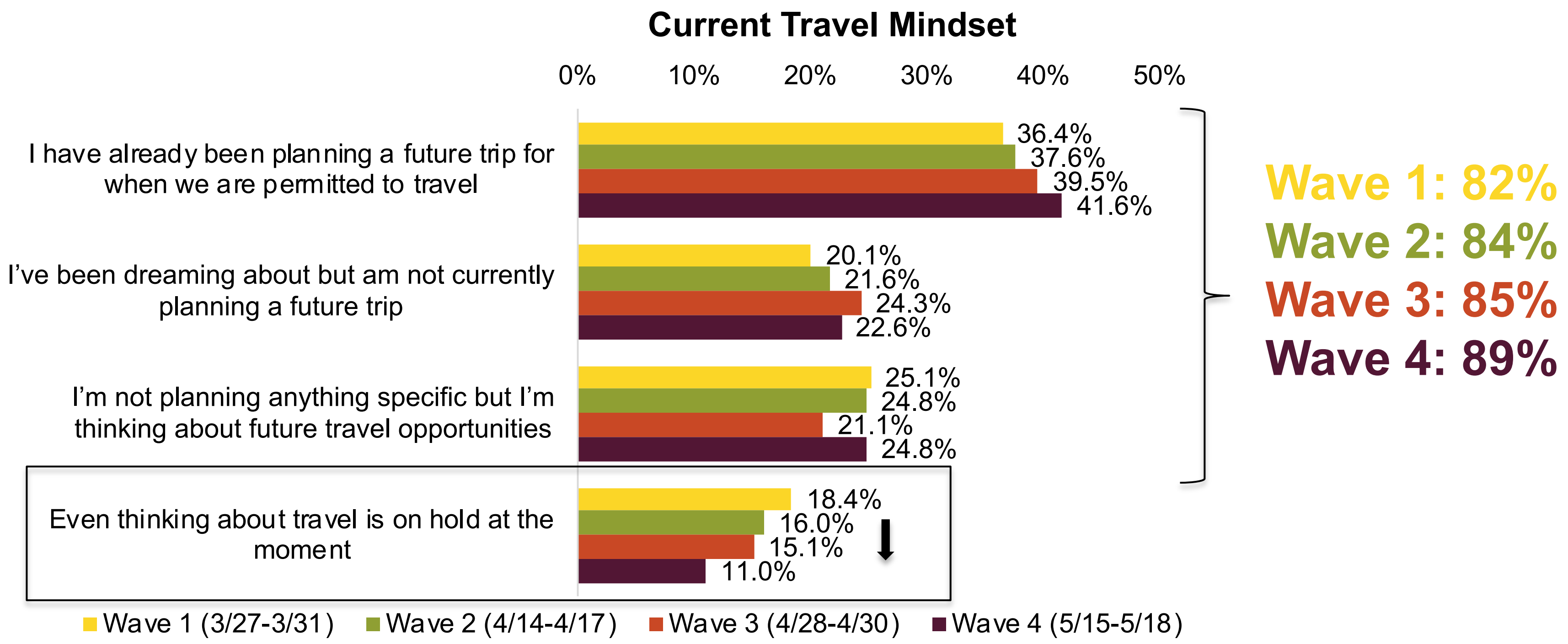
Insights & Implications (cont.)

- **While travelers are looking for an in-destination experience that resembles pre-C-19, they will need a variety of safety procedures in place while flying.**
  - Consistent with Wave 3, U.S. travelers are mainly looking for destination advertising to convey a sense of normalcy - without masks.
  - As seen in Wave 3, most travelers expect destinations to be the same post-pandemic, with most if not all attractions and businesses open.
  - To feel comfortable to travel by plane, travelers will need to see other travelers wearing masks in the airport and on the plane, airplanes limiting occupancy, increased sanitation on the plane, hand sanitizer being provided on the plane, and airport employees wearing masks.
- **Travelers expect to be welcomed into destinations and will be fairly welcoming to those who visit their communities.**
  - Majority of travelers are not uncomfortable with visitors coming into their local communities, with only 2 in 10 saying they would be uncomfortable.
  - Almost all travelers expect the communities they visit to be at least somewhat welcoming, with just over half of travelers expecting them to be extremely or very welcoming.
- **The types of trips that travelers look most forward to are shifting away from family travel.**
  - Visiting family friends, road trips, family getaways, and small-town getaways are on the decline.
  - There is increased interest in spiritual experiences, all-inclusive packaged holidays, and group tours.
- **Parents continue to emerge as a particularly eager segment and will lead the way in getting back to travel.**
  - Parents are more likely to get back to travel behaviors quickly, to travel more post-pandemic, to travel this summer, to travel outside of their state, to be currently planning a trip, and to have already set dates for a future trip.
  - Parents also have strong positive sentiment towards the U.S. travel industry and destinations and are expecting travel to be a similar experience as before the pandemic: they want to see advertising without masks, they expect destinations to be similar to how they were before, they expect to be welcomed into a destination and will welcome others to come into their community.

Detailed Findings

Current Travel Mindset & Attitudes

From mid-April to mid-May, there was a decrease in travelers who say that even thinking about travel is on hold at the moment, and an increase in those who are thinking about travel in some sense (from about 8 in 10 to about 9 in 10).



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, Wave 4 n=506

Of those currently travel planning/thinking/dreaming, nearly 9 in 10 say they have at least determined a few places they would like to go. But only 1 in 10 have booked anything.

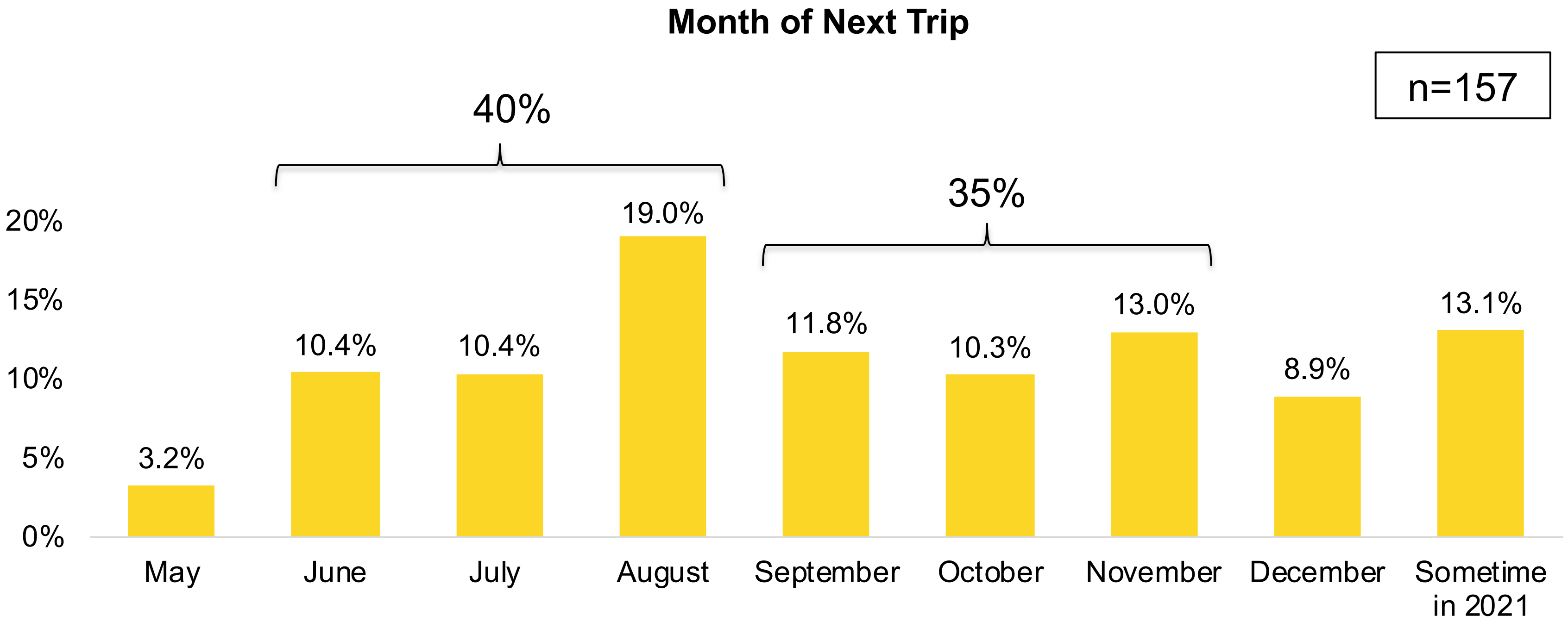
n=452

88% have taken at least one step towards a trip

18 to 34-year-old travelers are more likely to have taken at least one step towards a trip compared to older travelers

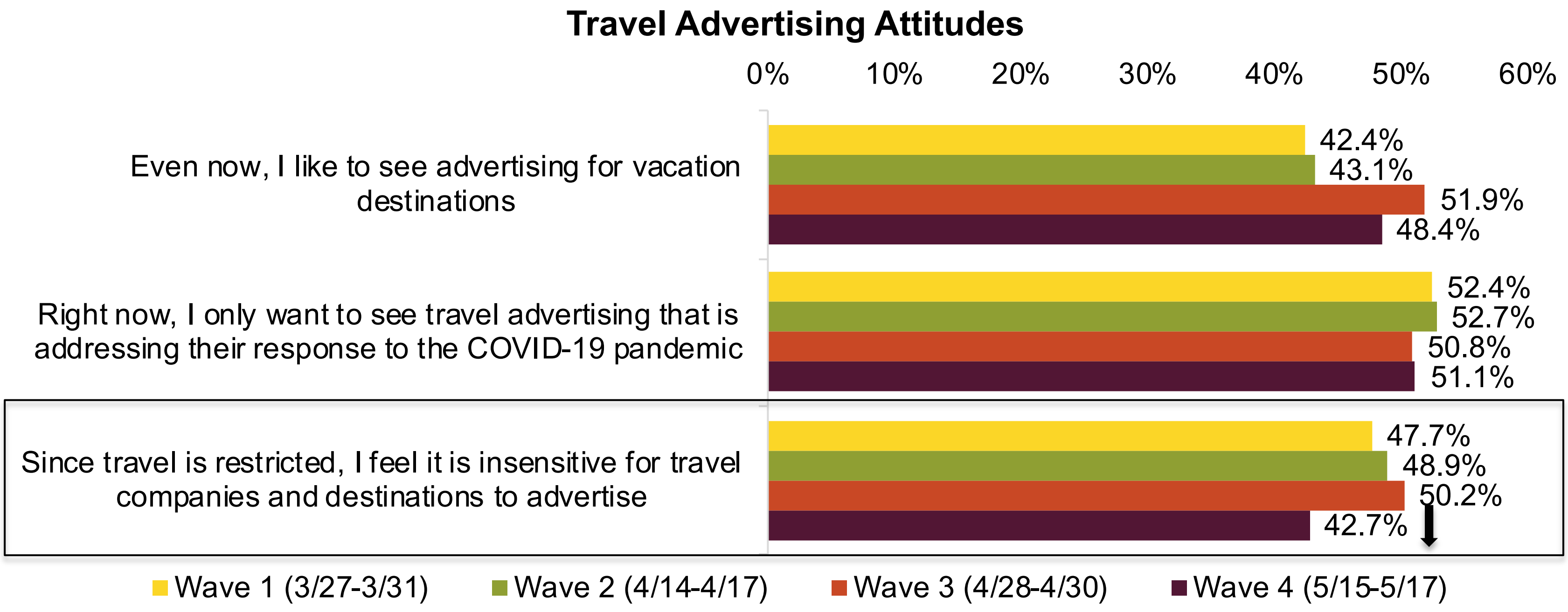
Q7b Which of the following steps have you taken towards planning a future trip? (Please select all that apply) ; Wave 4 n=506

Of those who have set dates for their next trip, 4 in 10 set their trip for some time in summer, and just over one-third set their trip for some time in fall. Just over 1 in 10 set their trip for some time in 2021.



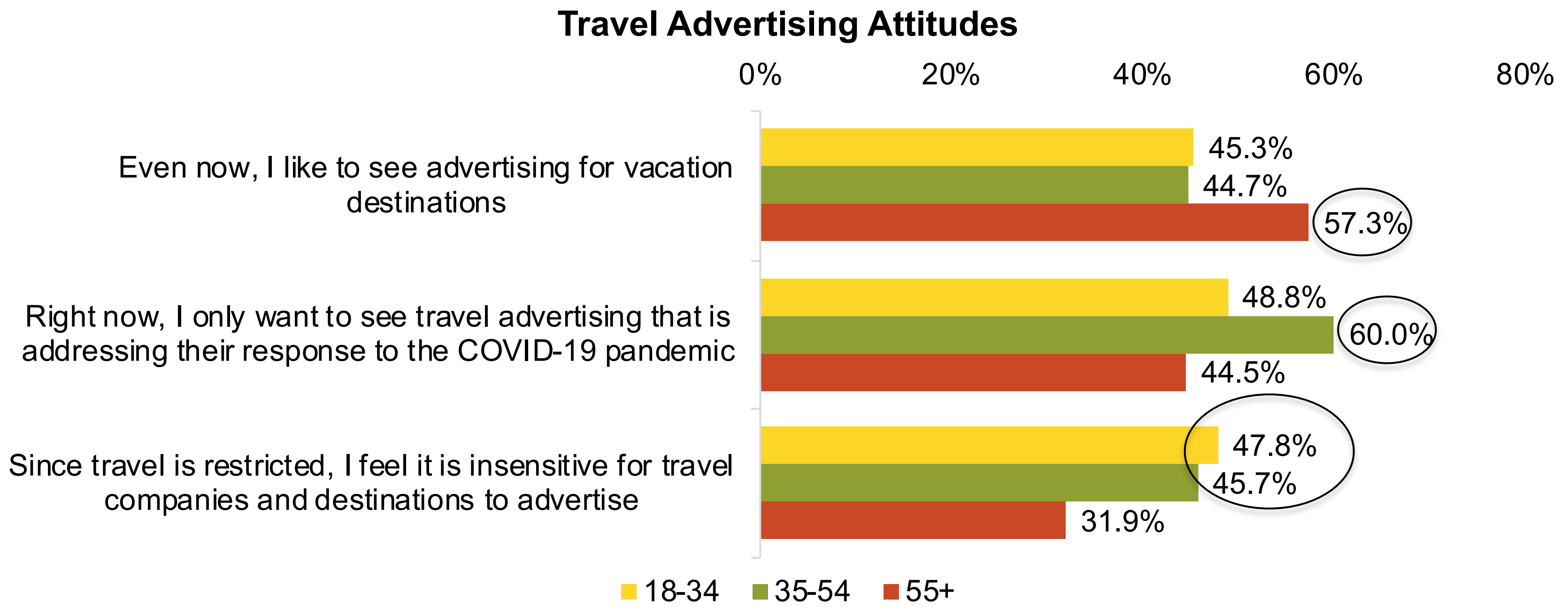
Q7c During which month did you book your next trip?; Wave 4 n=506

There was a decrease in travelers who feel it is insensitive for travel companies and destinations to advertise 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, Wave n=506

Travelers aged 55+ are the most likely to want to see advertising right now, and under 55 are more likely to say advertising now would be insensitive. Those who are 35-54 are most likely to say they only want to see advertising that addresses COVID-19.



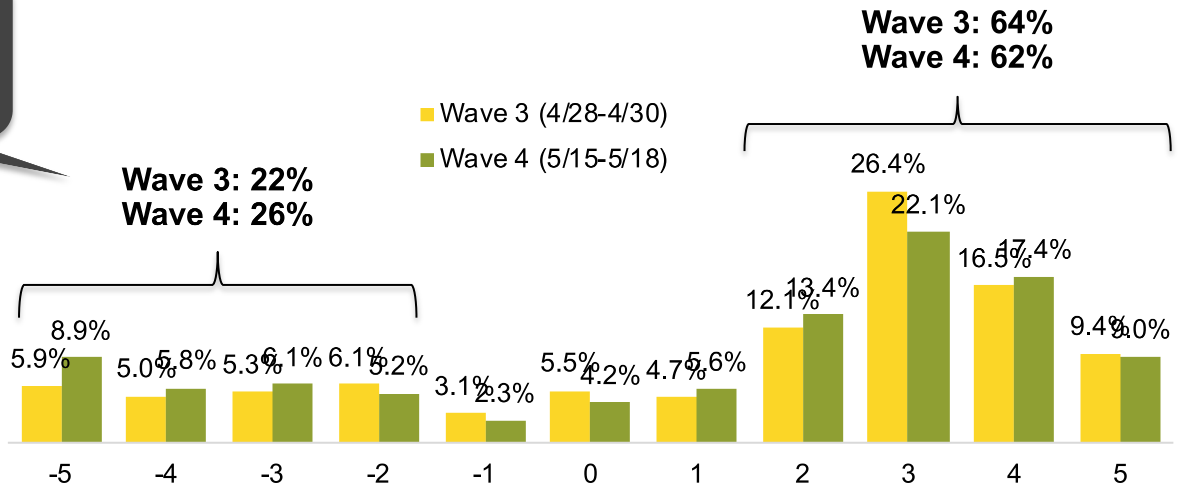
Q5. Indicate how much you agree or disagree with the following statements about the travel industry in the current climate. ; Wave 4 18-34 n=217, 35-54 n=160, 55+ n=129

Consistent with Wave 3, U.S. travelers are mainly looking for destination advertising to convey a sense of normalcy: just over six in 10 say they would like to see ads that show people without masks or PPE, while around one-fourth say they would like to see ads with masks/PPE.

Desire to See Masks/PPE in Destination Advertising

Female travelers and those who make less than $50,000 are more likely to want to see masks in advertising

I would like to see destination ads that portray **people wearing masks/PPE** as it communicates **safety** for me.

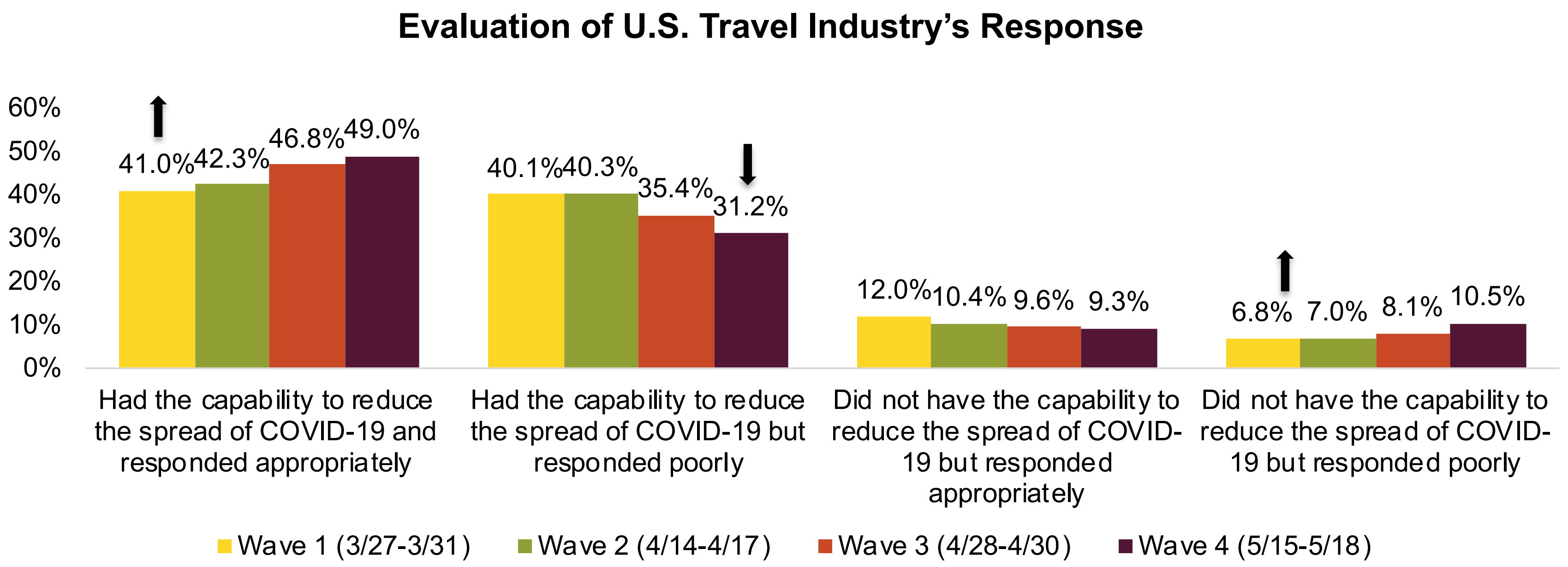


I would like to see destination ads that show **people without masks/PPE** as it communicates **normalcy** for me.

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, Wave 4 n=506

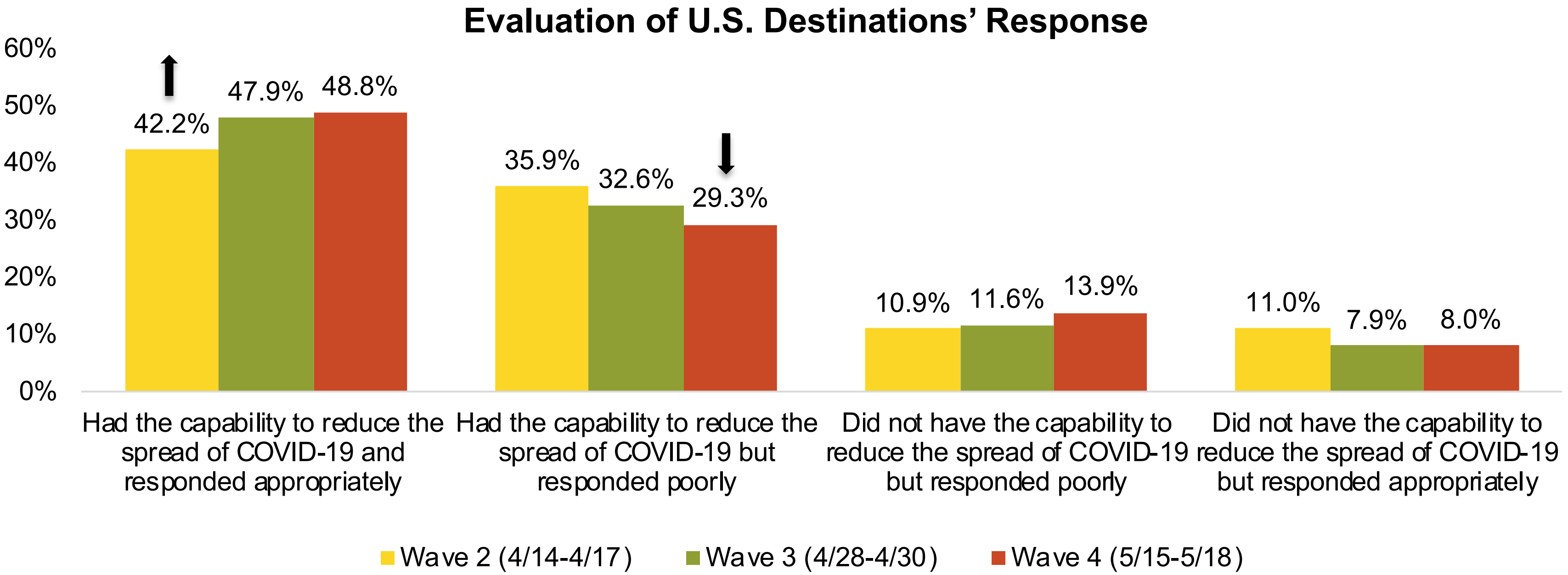
There was an increase in travelers who say the U.S. travel *industry* had the capability to reduce the spread and responded *appropriately*, and a decrease in those who say the industry had the ability to reduce spread but responded *poorly*.

There was also an increase in those who say the industry did not have the capability to reduce the spread but responded poorly.



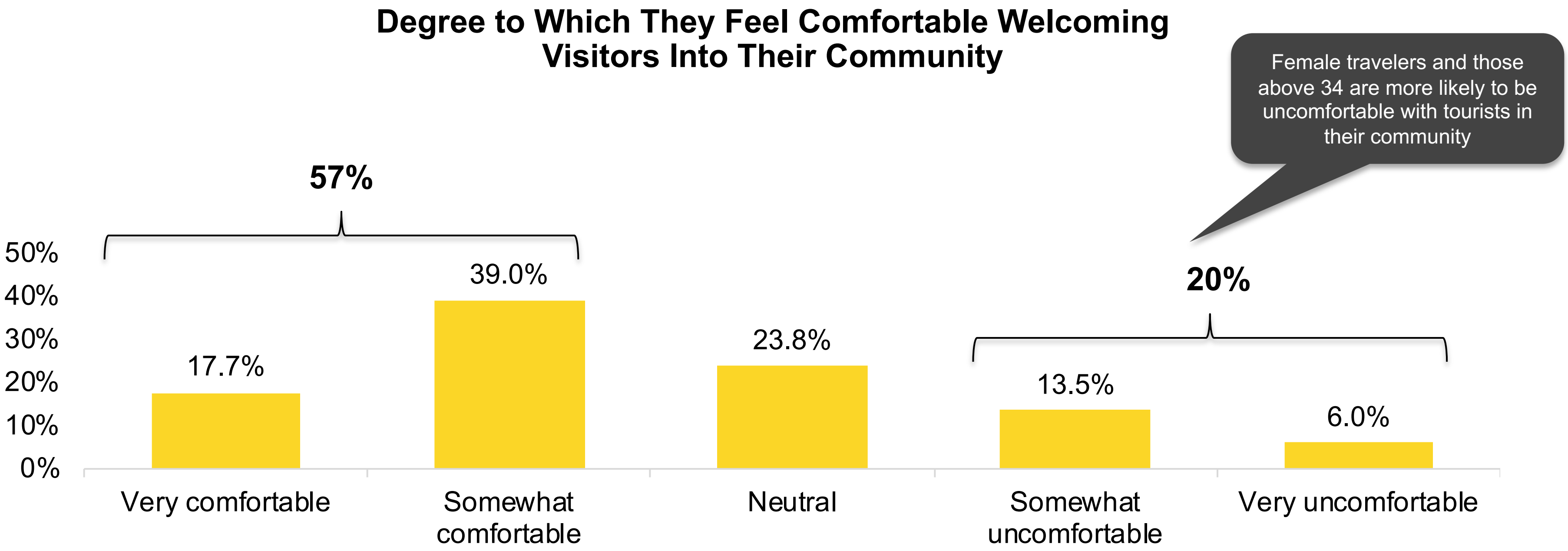
 Q6. How did the U.S. travel industry respond to the spread of COVID-19? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

Similarly, there was an increase in travelers who say U.S. *destinations* had the ability to reduce the spread of COVID-19 and responded *appropriately*, and a decrease in those who say destination 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, Wave 4 n=506

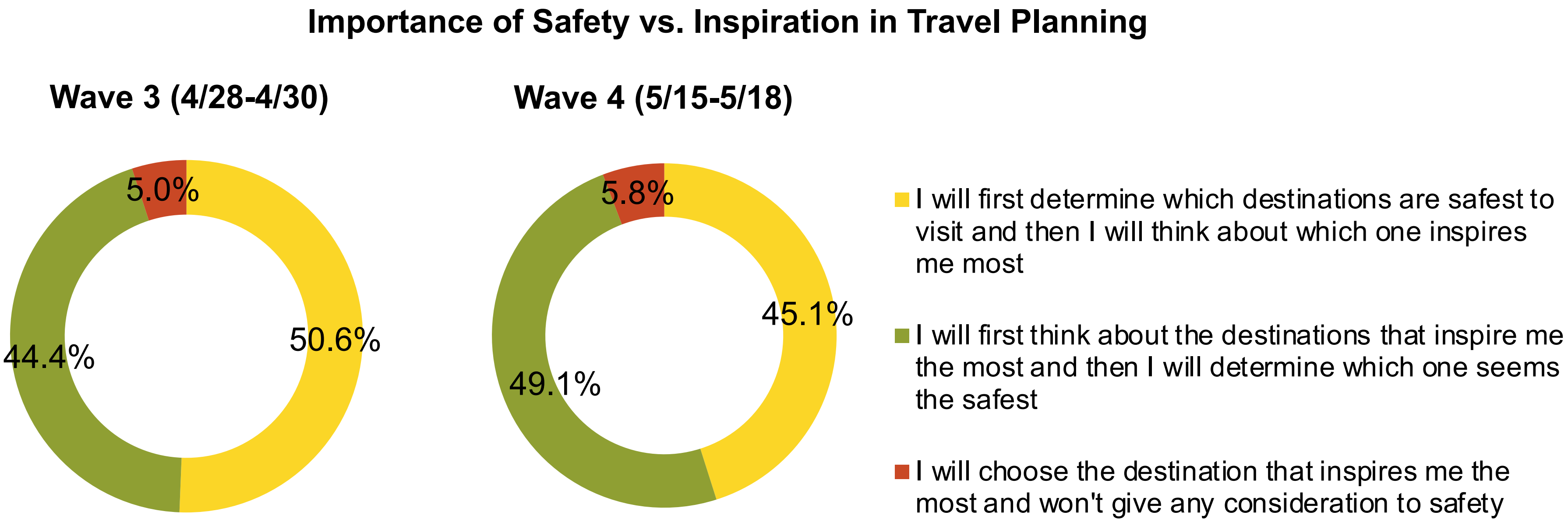
Most travelers are at least somewhat comfortable with visitors coming into their local communities, with only 2 in 10 saying they would be uncomfortable.



Q18c Thinking about how you feel right now, how comfortable are you with your local community welcoming visitors in the near future? Wave 4 n=506

Decision-Making & Safety Considerations

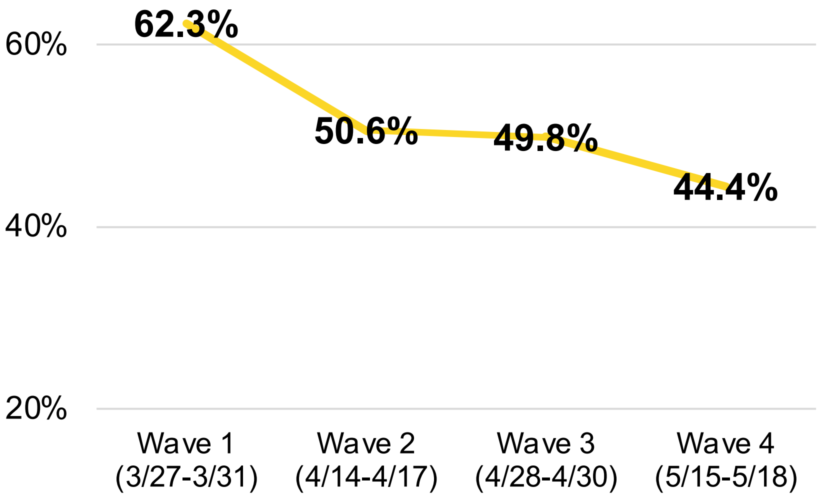
Travelers remain split on whether safety or inspiration will come first in destination decision-making, with just under half saying they will think about where it is *safe to travel* first, and just under half saying they will think about where they are *inspired* to go first.



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, Wave 4 n=506

The proportion of consumers who perceive travel in the U.S. to be safe post-pandemic is slowly decreasing. Those who are 55+ are more likely than those younger to perceive travel as safe.

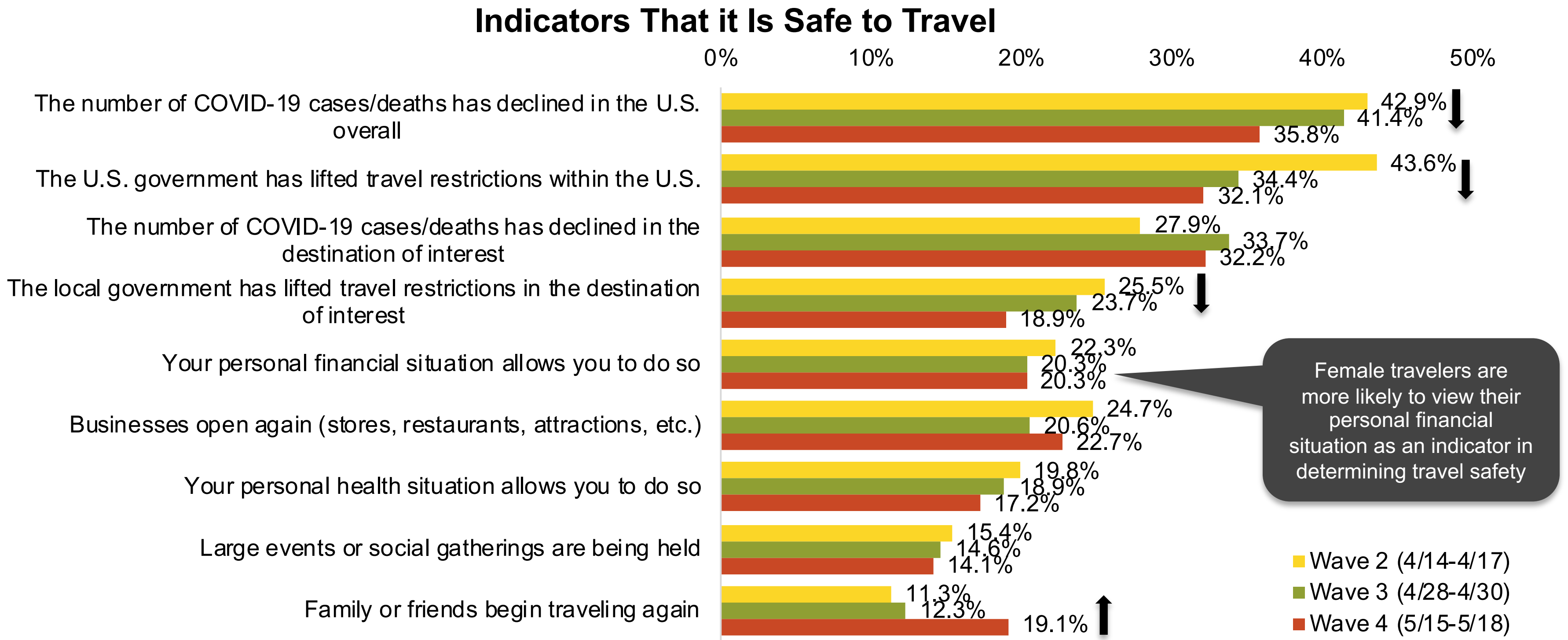
Perceive Travel As At Least Somewhat Safe



41% 54 and younger vs. **55%** 55 and older

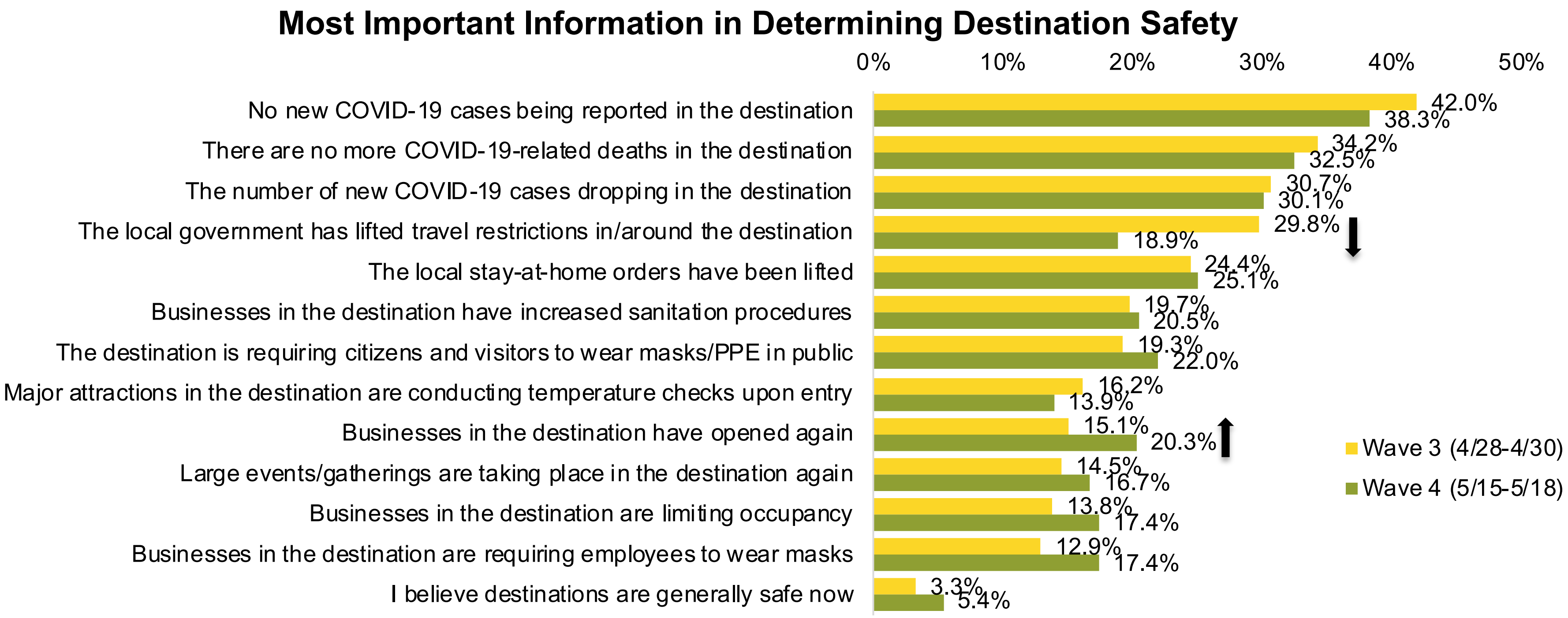
Q8. Thinking ahead, once the COVID-19 pandemic is over and the travel restrictions are lifted, how safe do you expect travel to be in the U.S.? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506; Wave 4 54 and younger n=377, 55 and older n=129

Travelers will be looking *less* at indicators like the number of cases/deaths and lifting of travel restrictions and increasingly more to family or friends traveling again as an indicator of travel safety.



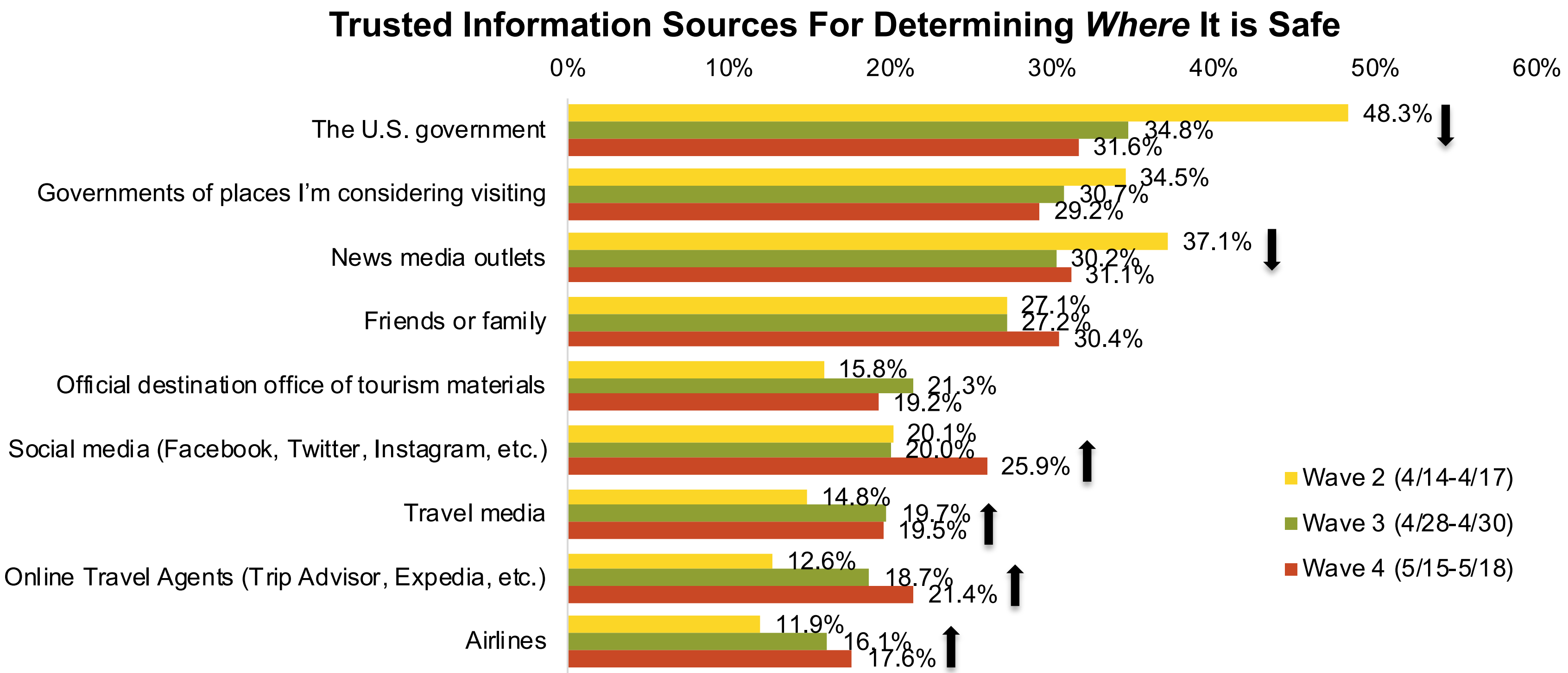
Q8b Which of the following indicators will be the most influential in determining when you think it is safe to travel within the U.S. again? Indicate only those that will be most influential to your decision – up to three.; Wave 2 n=505, Wave 3 n=500,Wave 4 n=506

In determining destination safety, travelers are looking less to travel restrictions and more to businesses opening and enforced masks as indicators of safety.



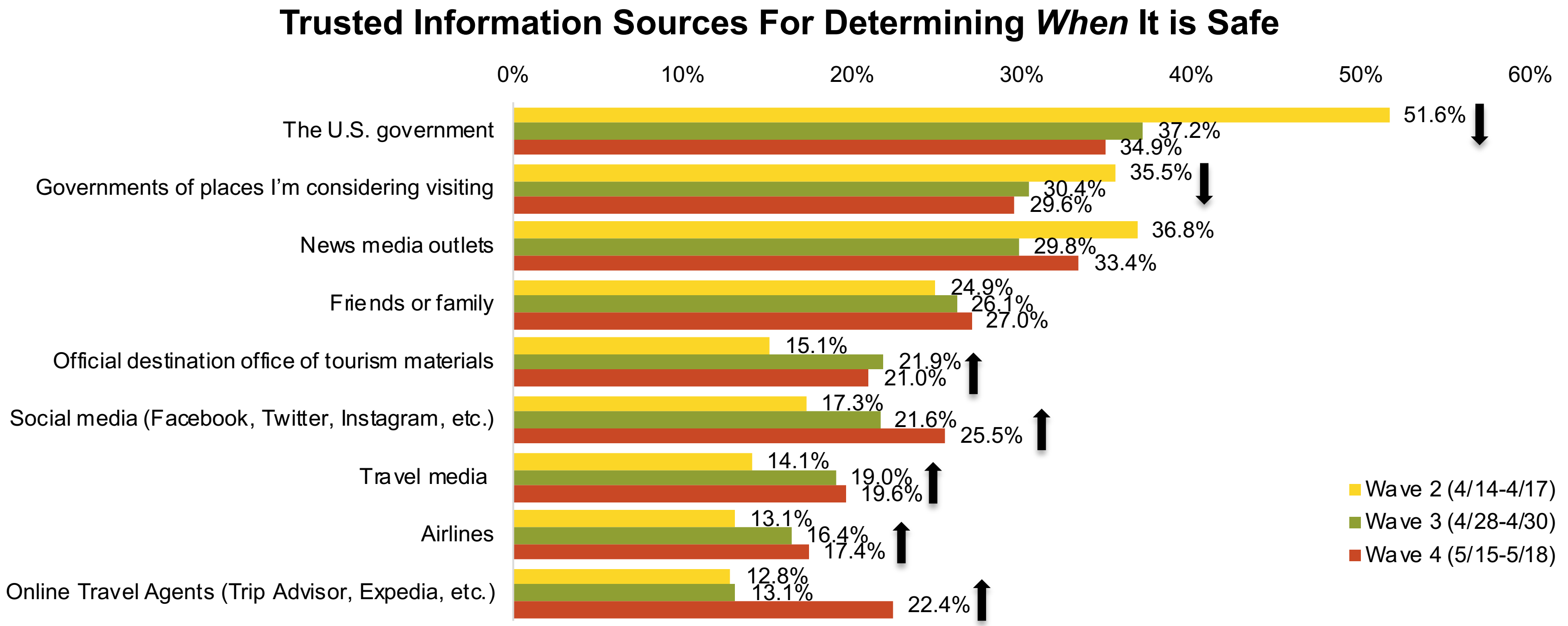
Q8c. Which of the following pieces of information would be most important for you to see or hear in order to feel it is safe to visit a certain destination within the U.S.? Indicate up to four. Wave 3 n=500, Wave 4 n=506

Social media and friends/family are increasingly trusted for determining *where* it is safe to travel. As seen in the previous wave, the U.S. government and news media outlets are decreasing as trusted sources.



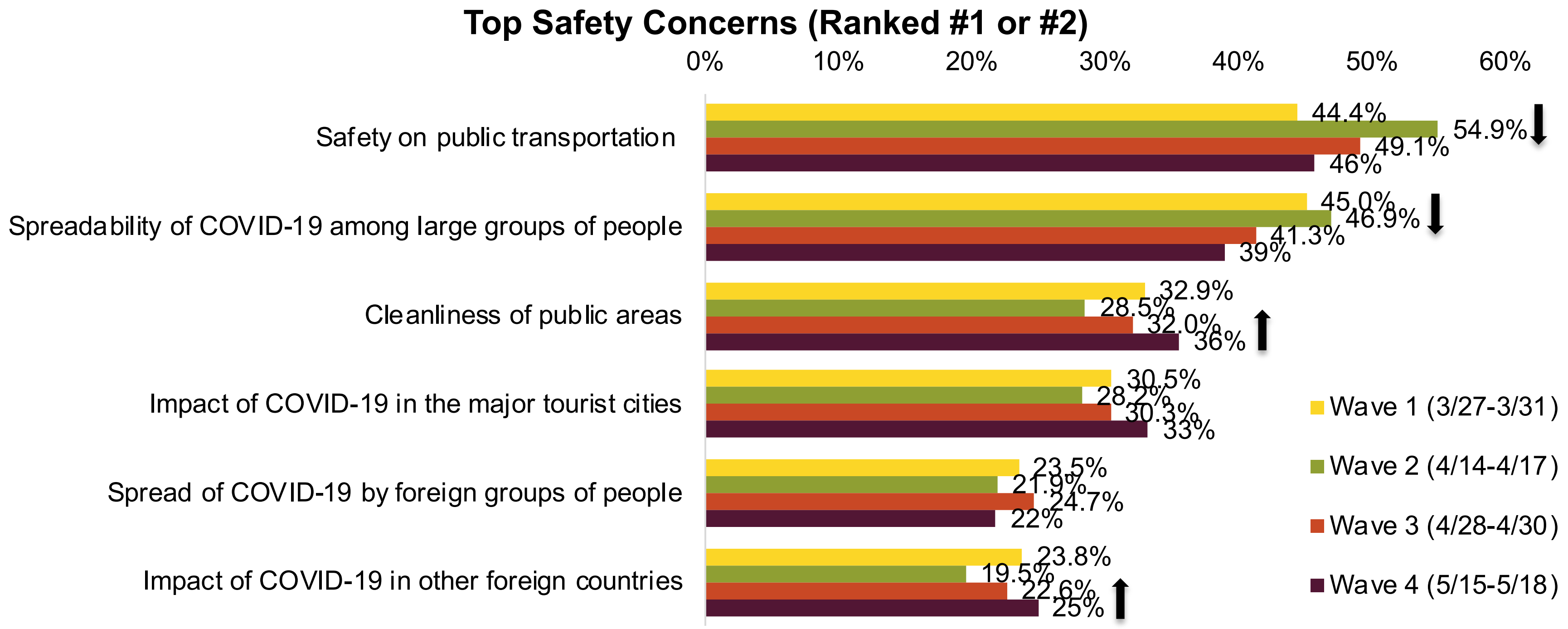
Q18a When planning your next leisure travel, who will you most trust to provide information that will help you decide where it is safe to travel? (Please select up to three.) Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

Online travel agents and social media are increasingly looked to for determining *when* it's safe to travel. After a decline in the last wave, trust in news media outlets has somewhat rebounded.



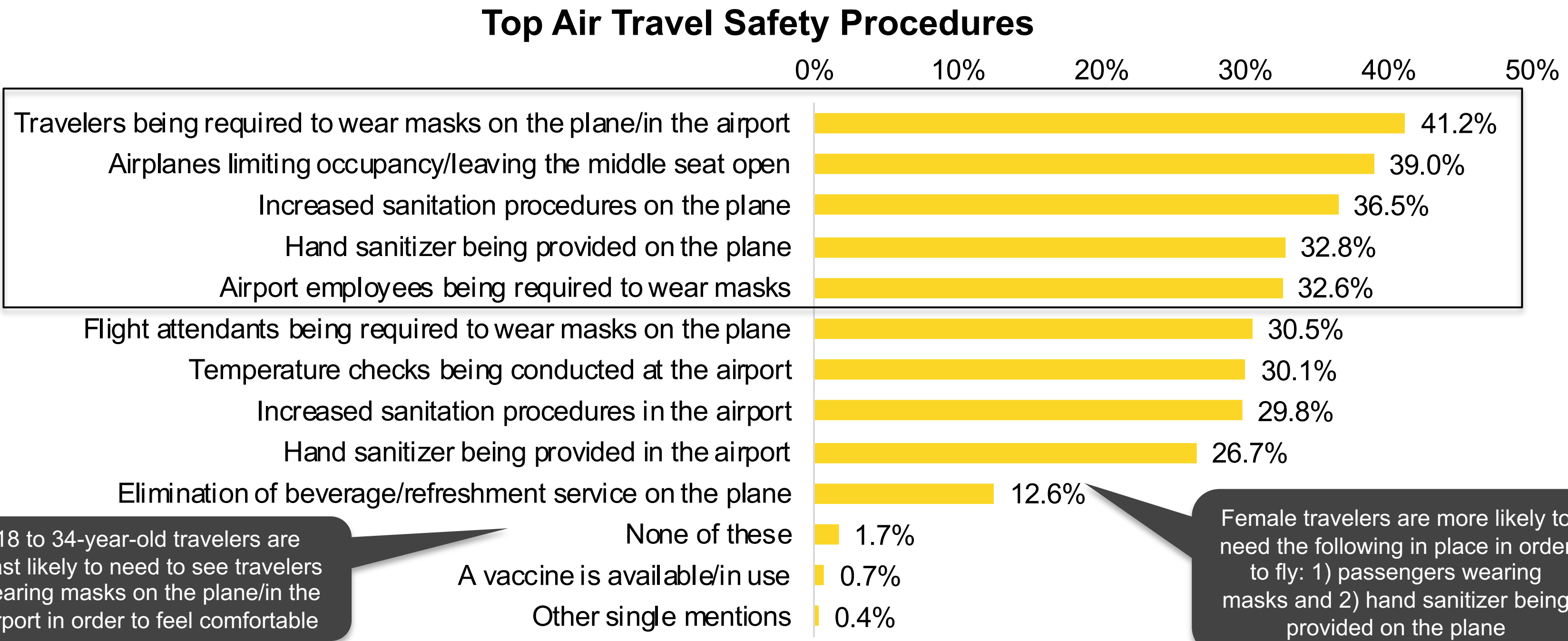
Q18b When planning your next leisure travel, who will you most trust to provide information that will help you decide when it is safe to travel? (Please select up to three.) Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

There was a decrease in concern for safety on public transportation and spreadability among large groups of people and an increase in concern for the cleanliness of public areas and the impact of COVID-19 in foreign countries.



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, Wave 4 n=506

To feel comfortable traveling by plane, travelers will need to see travelers and employees wearing masks in the airport and on the plane, airplanes limiting occupancy, increased sanitation on the plane, and hand sanitizer being provided on the plane.

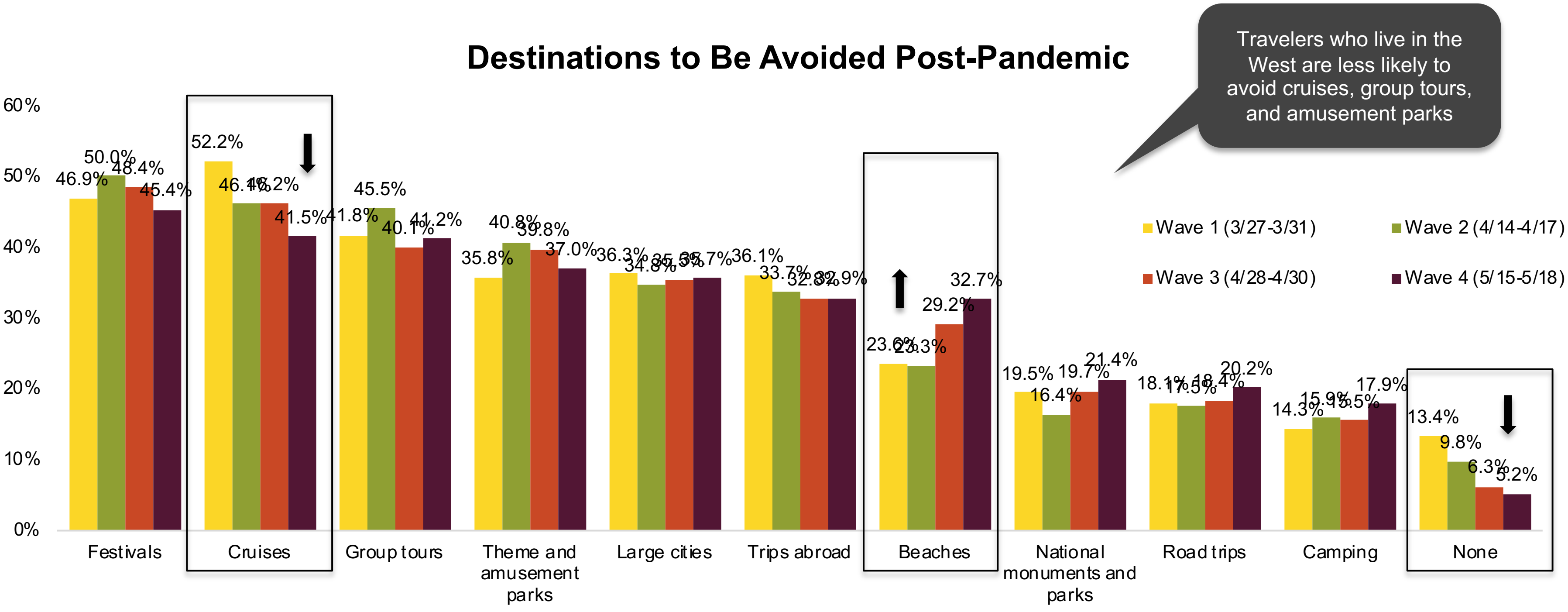


18 to 34-year-old travelers are least likely to need to see travelers wearing masks on the plane/in the airport in order to feel comfortable

Female travelers are more likely to need the following in place in order to fly: 1) passengers wearing masks and 2) hand sanitizer being provided on the plane

Q11b In the time following the pandemic, which of the following are the top safety measures that would need to be in place in order for you to feel comfortable to travel by plane? (Please select up to four.) Wave 4 n=506

Fewer travelers now say they will avoid cruises post-pandemic. The increase in travelers who say they will avoid beaches post-pandemic was sustained. Now, nearly all travelers say they will avoid at least one type of destination post-pandemic.

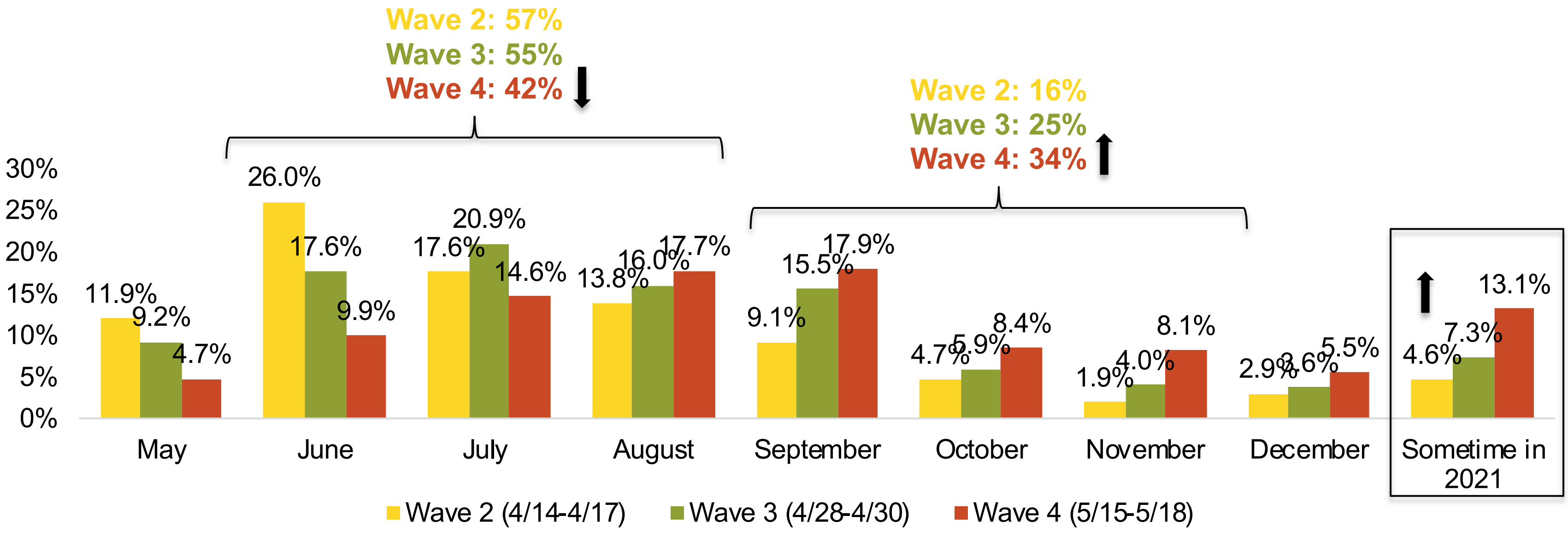


Q14. If any, what types of places are you going to avoid traveling to in the U.S. after the COVID-19 pandemic? (Select all that apply); Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

Traveling Post-Pandemic

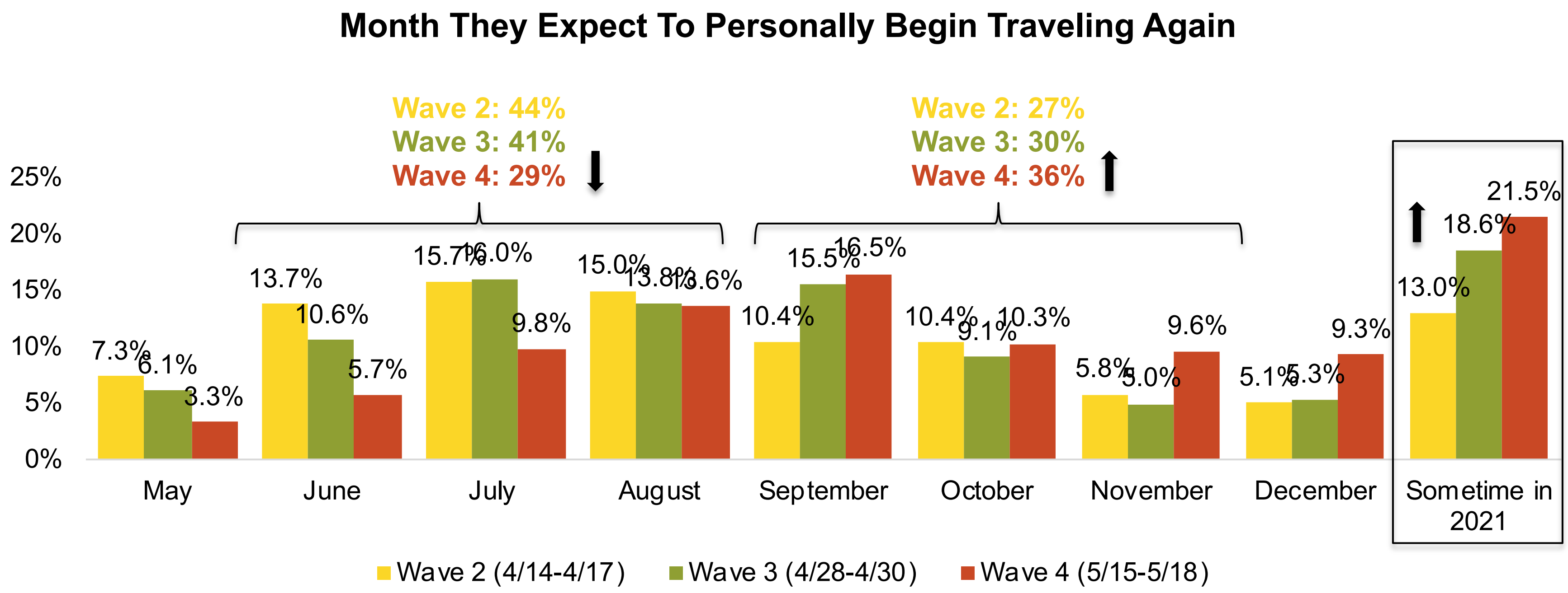
Travelers' predictions of when travel restrictions within the U.S. will be lifted are shifting from summer into the fall and beyond.

Month They Expect Travel Restrictions to Be Lifted in U.S.



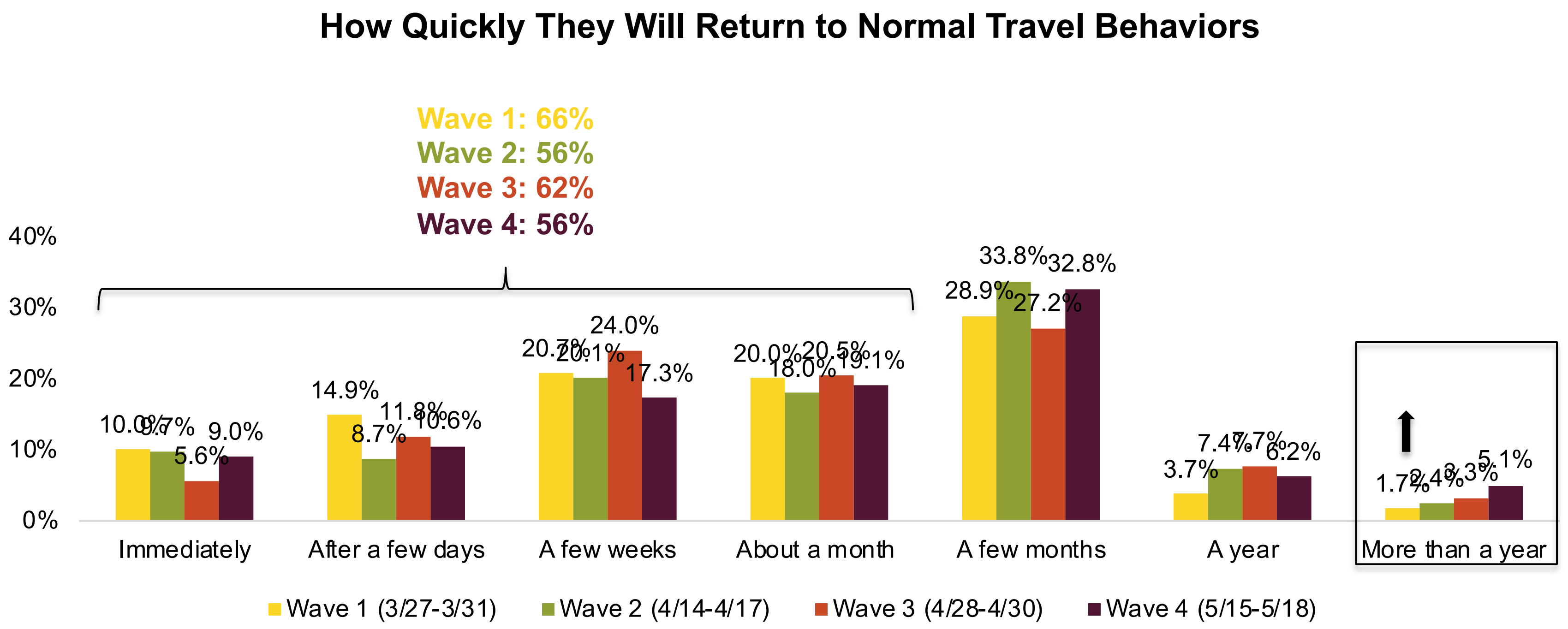
 Q17b. At this point, during which month do you expect the travel restrictions to be lifted within the U.S.? Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

Similarly, travelers' predictions of when they will begin traveling again are moving further out from summer, with an increase in those who say they will begin traveling in the fall or in 2021.



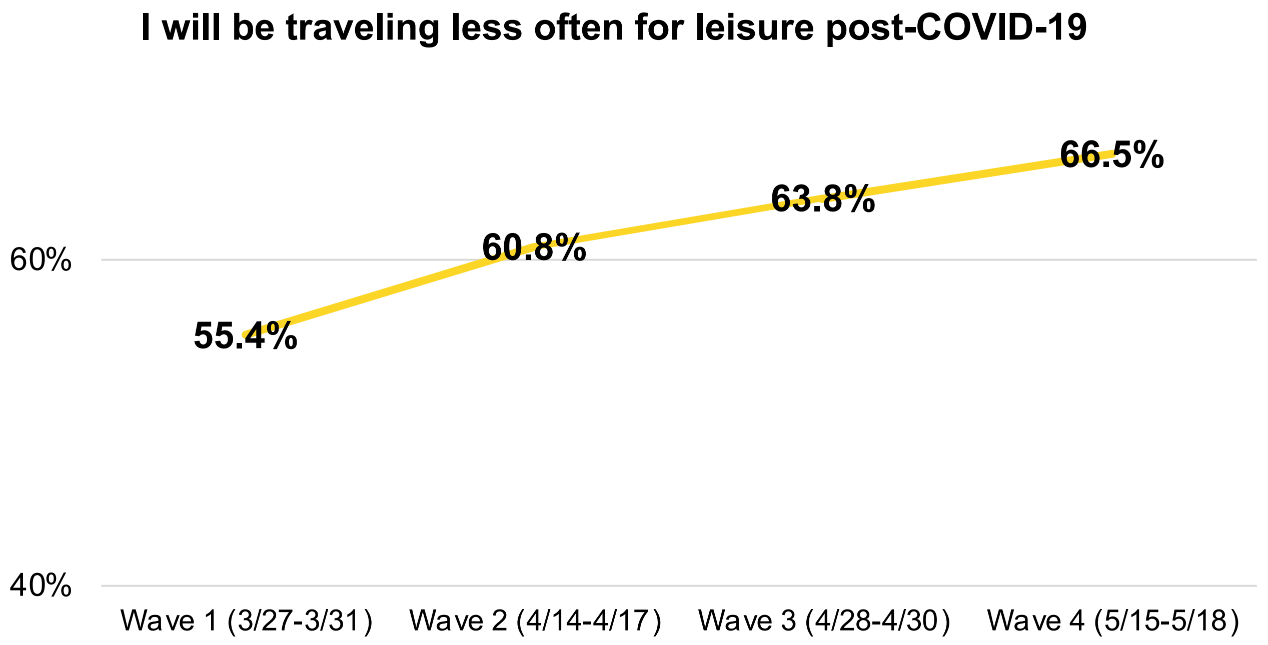
Q17c. During which month do you personally expect to start traveling within the U.S. again? Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

At this point, just over half of travelers feel they will get back to normal travel behaviors within a month of the official "all clear." However, that number is declining as the number saying they will wait more than a year to get back to travel behaviors grows slowly.



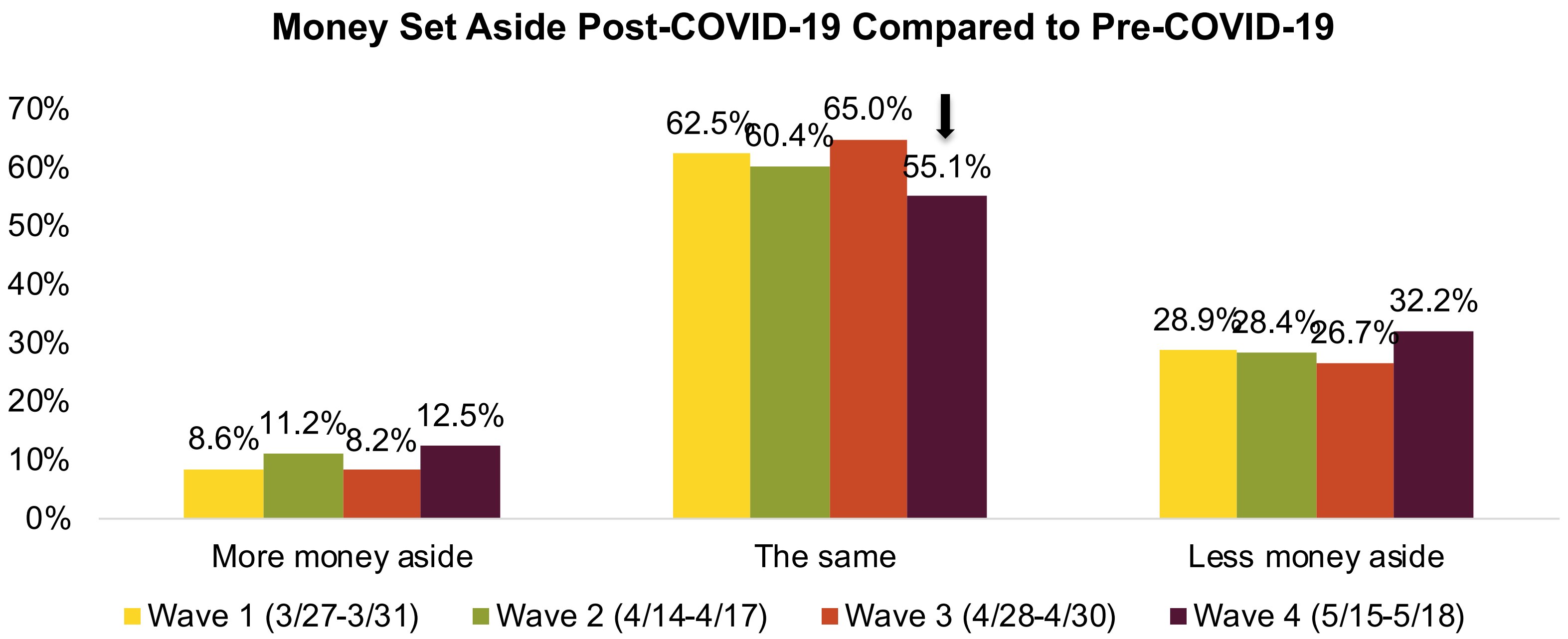
Q17. After the official "all clear" is given by government, how quickly do you expect to return to your normal behaviors regarding travel within the U.S.?
Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

There has been a steady increase in those who say they will be traveling less often for leisure post-pandemic.



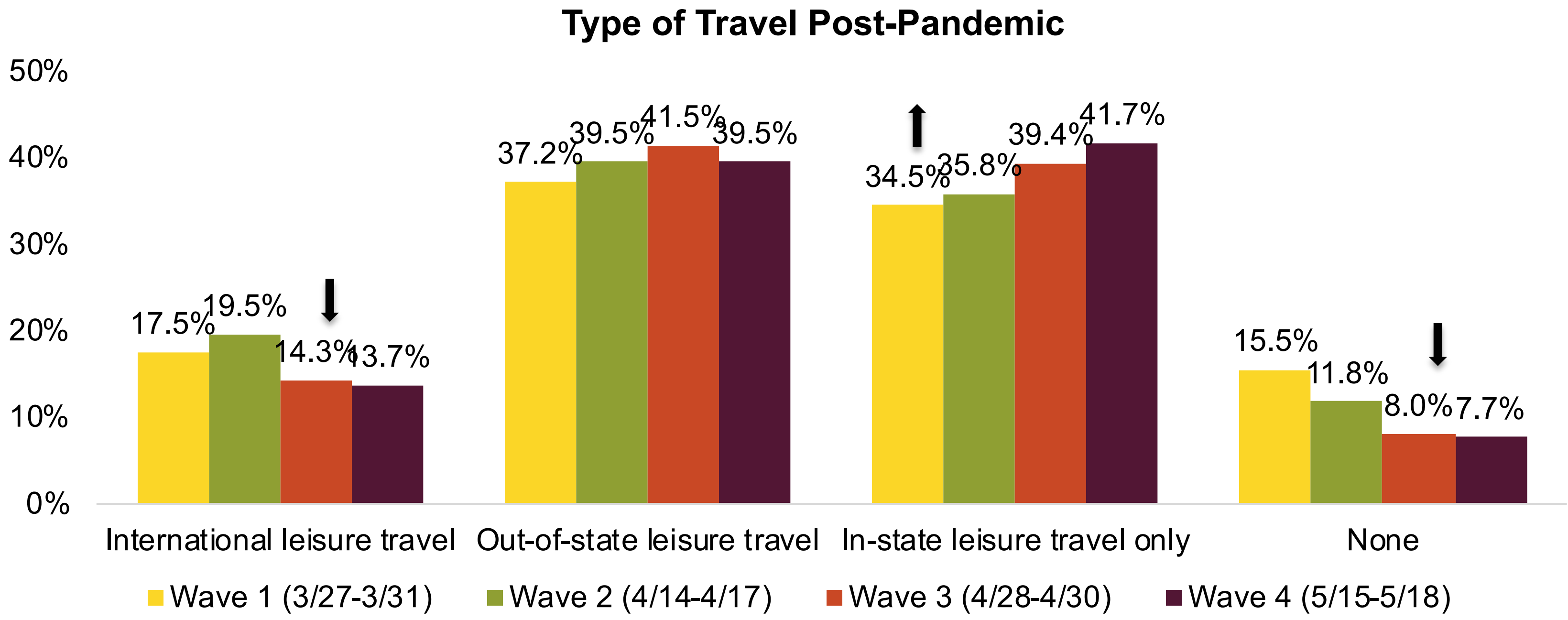
Q12. Longer term, as a result of the COVID-19 pandemic, which of the following do you anticipate for your own leisure travel within the U.S., compared to before the pandemic?; Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

Fewer travelers now say they will spend the same amount of money on leisure travel as they would have before the pandemic.



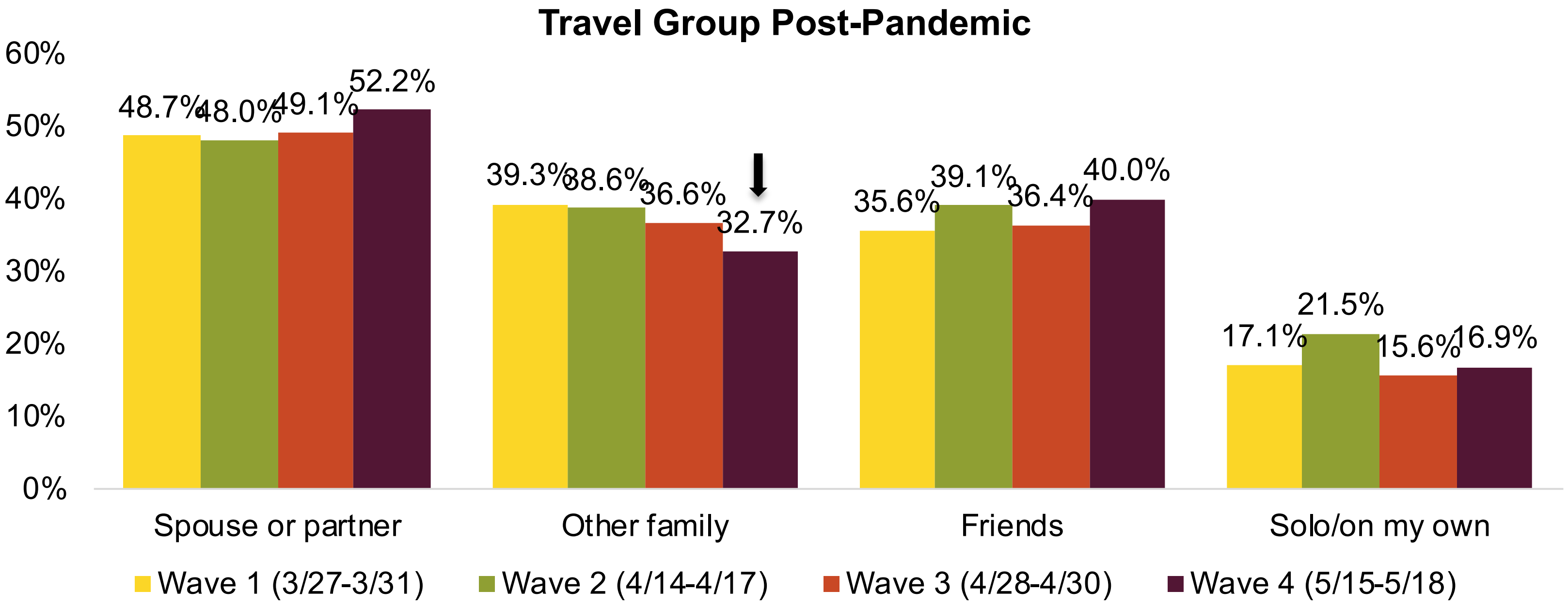
Q13. Once the COVID-19 pandemic is past, do you expect to set aside more, the same, or less money for your leisure travel in the U.S., compared to before the pandemic? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500,Wave 4 n=506

As seen in the past wave, a declining number of travelers say they will engage in no travel after the restrictions are removed. Travelers increasingly expect to limit travel to in-state.



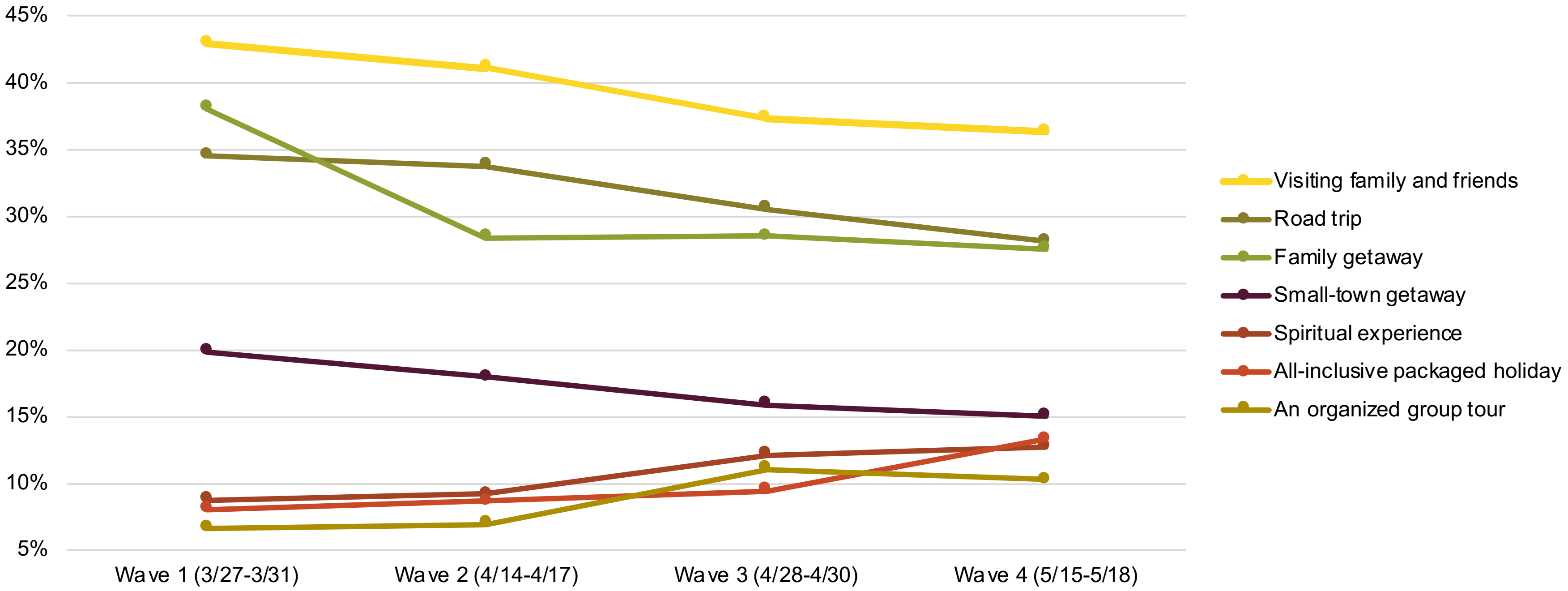
Q9. Immediately following the removal of travel restrictions, what type of leisure-travel would you do? Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

There was a decrease in travelers who say they will travel with family members other than their spouse or partner.



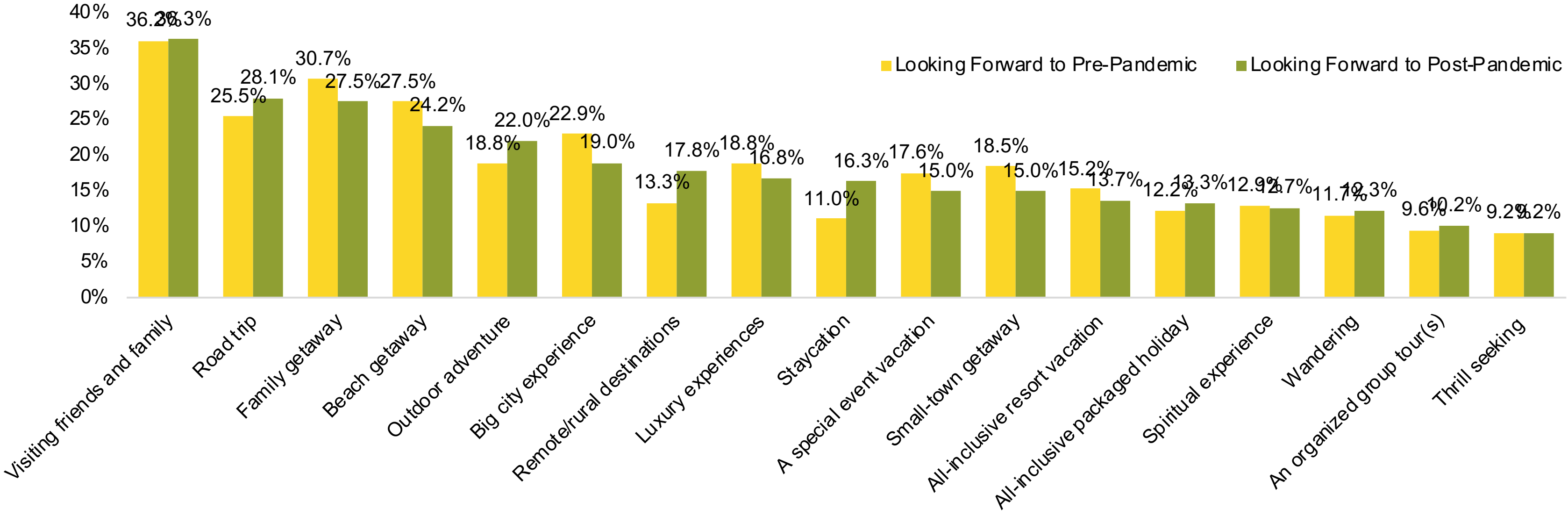
Q16. When travel restrictions are lifted and you take that first vacation post-COVID-19, who are you most looking forward to spending the time with? (Indicate all that apply.) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

While still the most popular, visiting family friends, road trips, family getaways, and small-town getaways are on the decline. There is increased interest in spiritual experiences and all-inclusive packaged holidays.



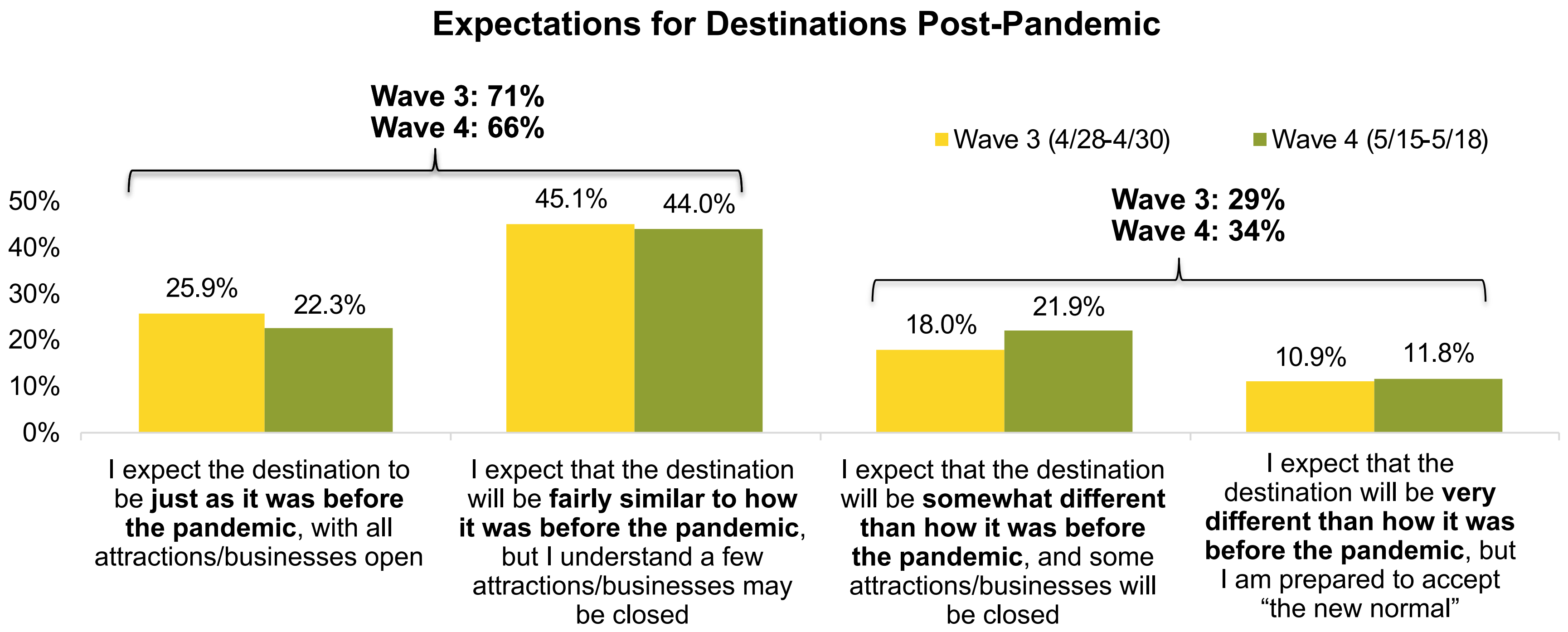
Q15b. What type of travel vacation are you looking forward to taking within the U.S. after the COVID-19 pandemic? (Select those you are most looking forward to – up to 5.) Wave 1 n=510, Wave 2 n=505, Wave 3 n=500, Wave 4 n=506

The vacation types travelers are looking forward to before the pandemic are like the types they are looking forward to now, with subtle increases in remote/rural destinations, staycations and outdoor adventures. And subtle decreases in small-towns, beaches and big cities.



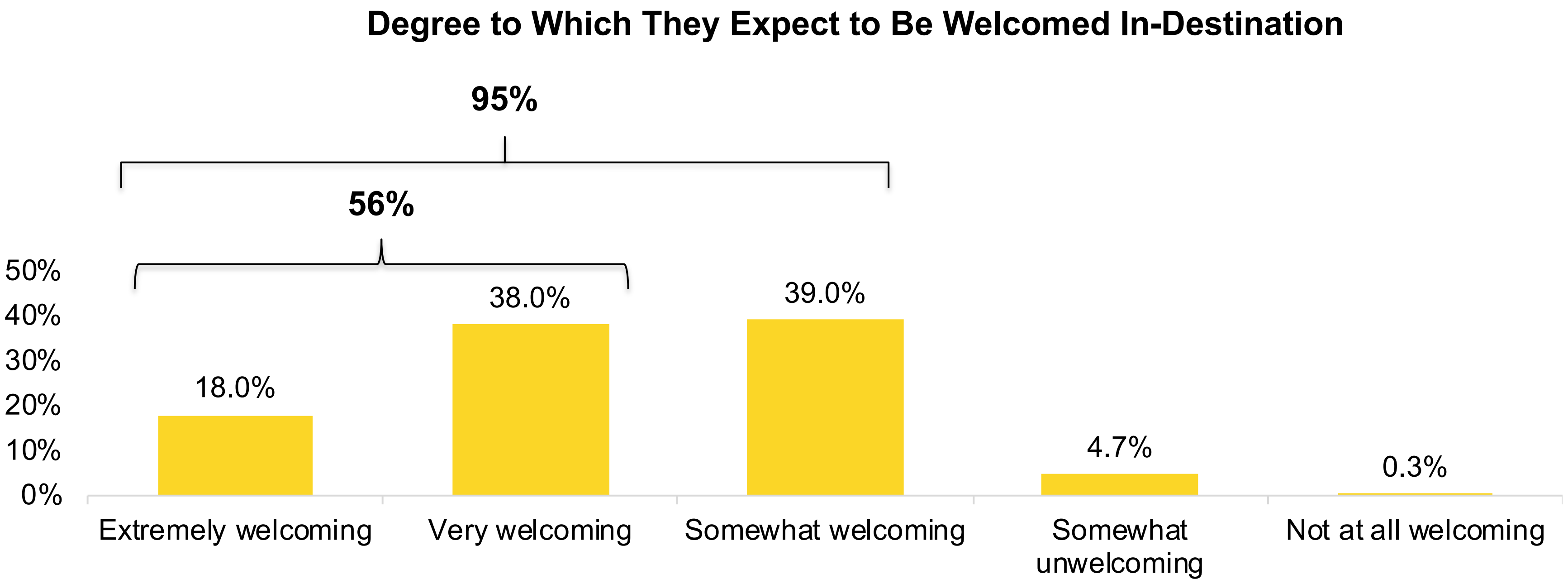
Q15a. What type of travel vacation were you looking forward to taking within the U.S. before the COVID-19 pandemic? (Select those you were most looking forward to – up to 5.) Q15b. What type of travel vacation are you looking forward to taking within the U.S. after the COVID-19 pandemic? (Select those you are most looking forward to – up to 5.) Wave 4 n=506

As seen in the previous wave, most travelers expect destinations to be the same post-pandemic, with most if not all attractions and businesses 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, Wave 4 n=506

Almost all travelers expect the communities they visit to be at least somewhat welcoming, with just over half of travelers expecting them to be extremely or very welcoming.



Q17e. How welcoming do you expect the local community to be in a destination you are considering visiting within the U.S. after the pandemic is over?
Wave 4 n=506

Parents and Travel

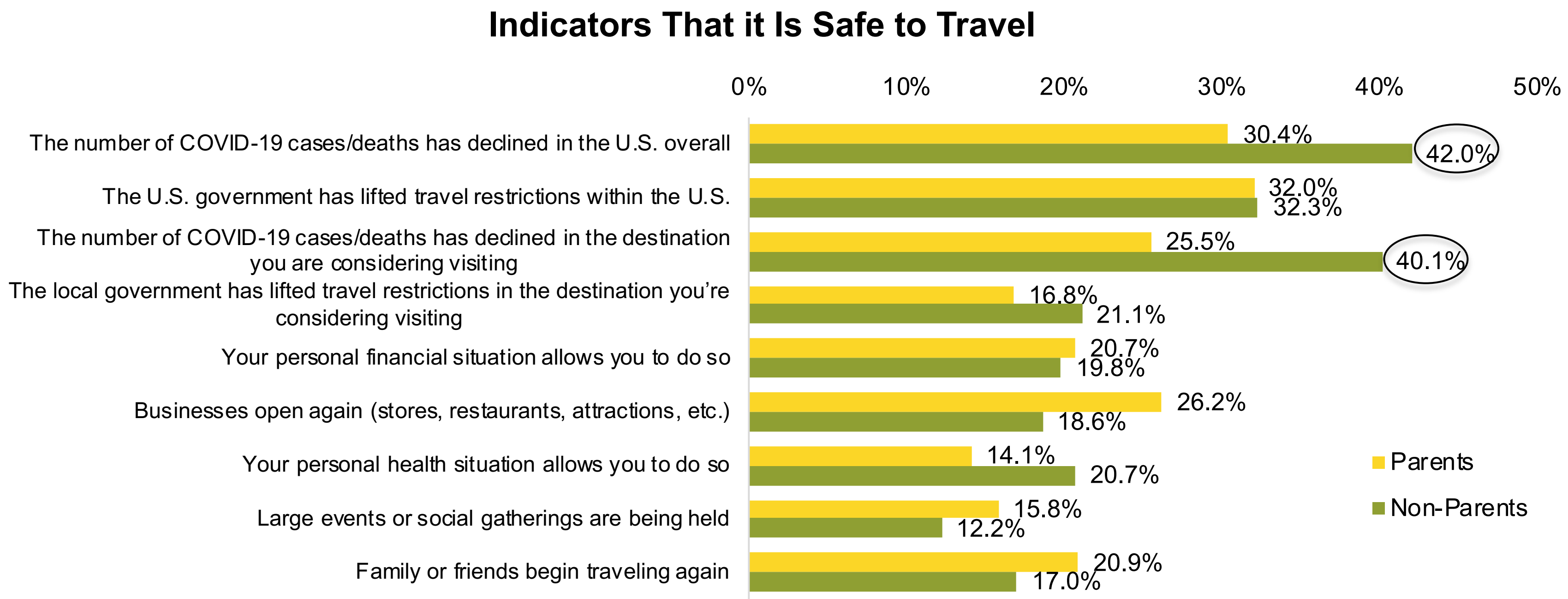
Parents have strong positive sentiment towards the U.S. travel industry and destinations and are expecting travel to be similar to how it was before the pandemic.

	Parents		Non-Parents
Believe Travel Industry Responded Appropriately	64% Parents	vs.	52% Non-Parents
Believe U.S. Destinations Responded Appropriately	63% Parents	vs.	50% Non-Parents
Want to See Advertising Without Masks	72% Parents	vs.	51% Non-Parents
Expect Destinations to Be Similar to Pre-Pandemic	76% Parents	vs.	55% Non-Parents
Expects to Be Extremely or Very Welcomed In a Community	61% Parents	vs.	50% Non-Parents
Comfortable With Tourists in Their Own Community	61% Parents	vs.	51% Non-Parents

Parents will lead the way in getting back to travel.

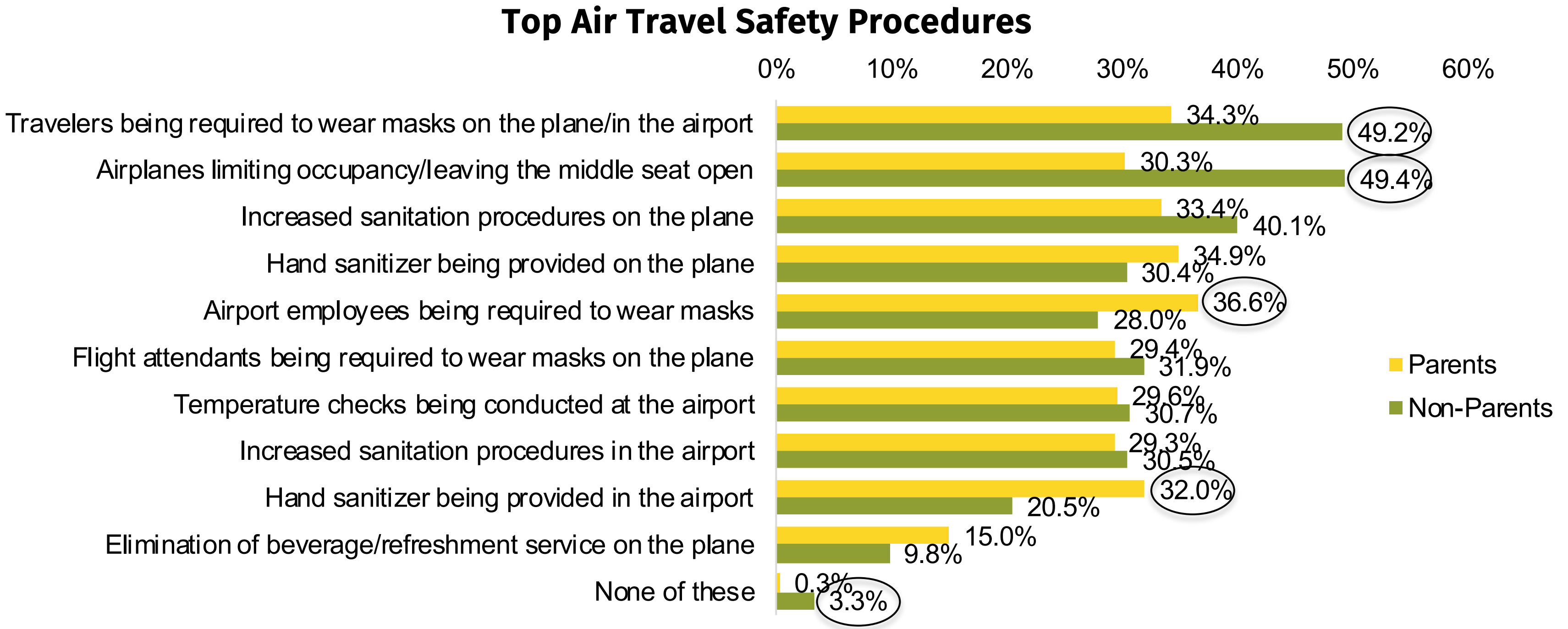
Will Get Back to Normal Travel Behaviors Within a Month	66% Parents	vs.	44% Non-Parents	**Will Travel More Post-Pandemic**	14% Parents	vs.	8% Non-Parents
Is Currently Planning a Future Trip	46% Parents	vs.	37% Non-Parents	**Will Travel This Summer**	35% Parents	vs.	22% Non-Parents
Has Set Dates for a Future Trip	32% Parents	vs.	20% Non-Parents	**Will Travel Out of State Post-Pandemic**	44% Parents	vs.	35% Non-Parents

When determining when it is safe to travel within the U.S. again, parents are less likely to view a decline in COVID-19 cases/deaths (in the U.S. overall and within a specific destination) as an influential safety indicator.



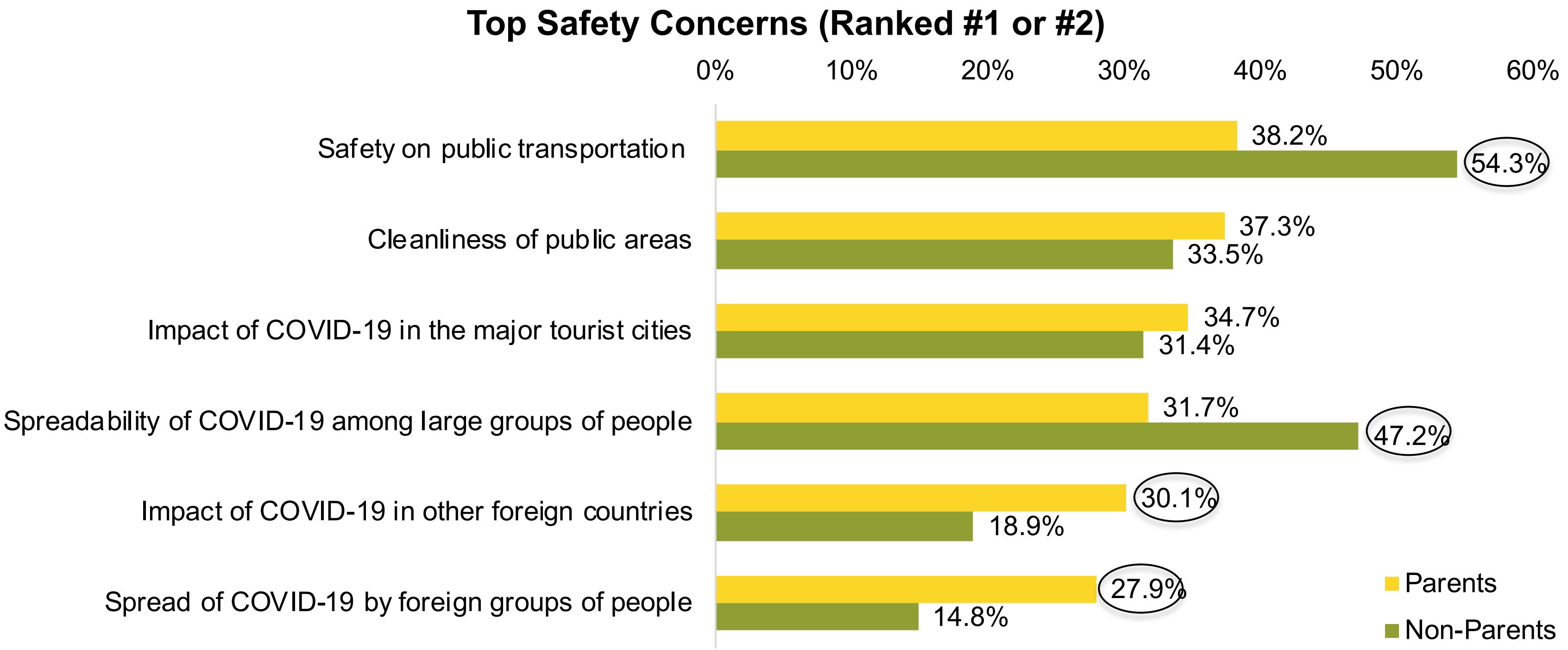
Q8b - Which of the following indicators will be the most influential in determining when you think it is safe to travel within the U.S. again? Indicate only those that will be most influential to your decision – up to three. Wave 4: Parents n=273, Non-Parents n=233

To feel comfortable flying, parents are less likely to need travelers to wear masks on the plane/in the airport and for airplanes to limit occupancy. They are more likely to need airport employees to wear masks and hand sanitizer to be provided in the airport.



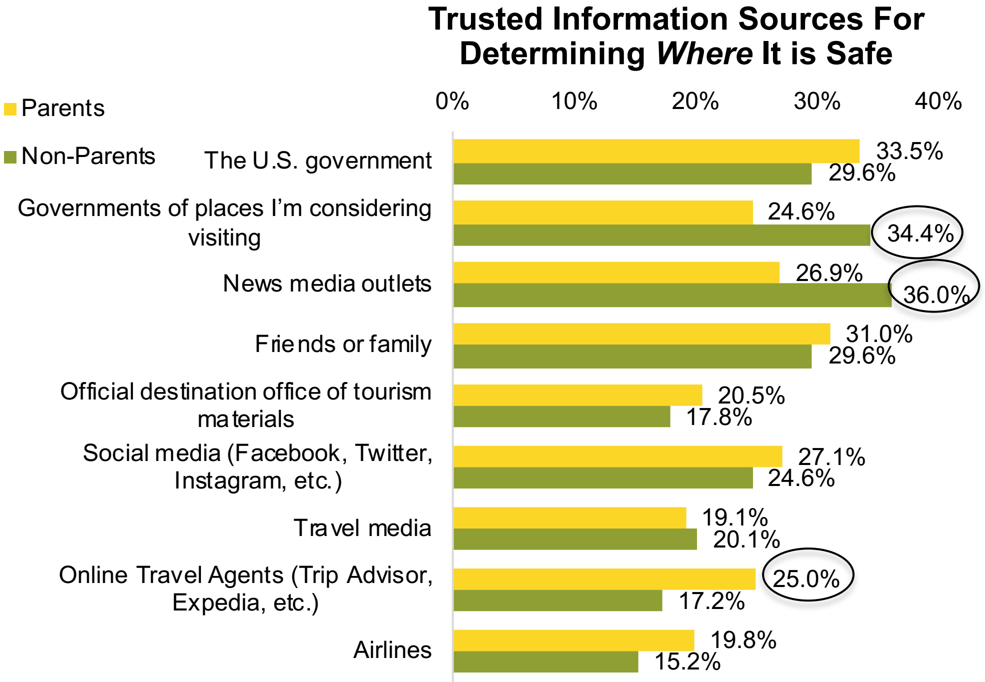
Q11b In the time following the pandemic, which of the following are the top safety measures that would need to be in place in order for you to feel comfortable to travel by plane? (Please select up to four.) Wave 4: Parents n=273, Non-Parents n=233

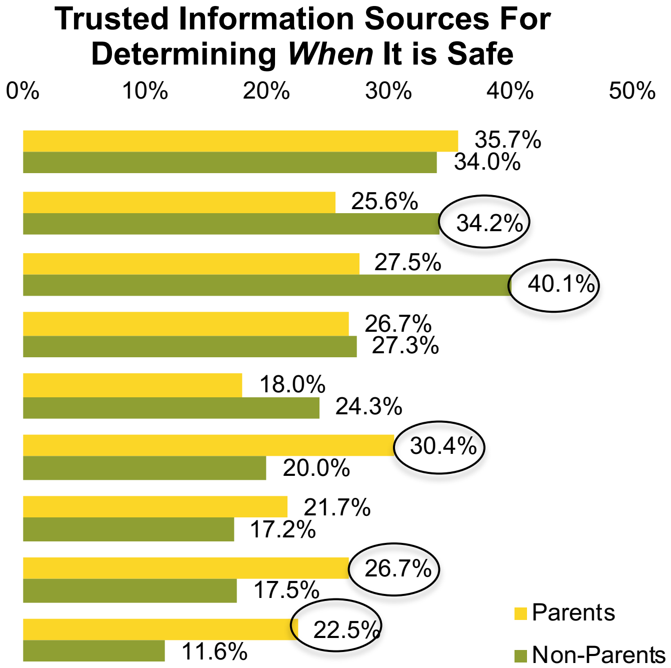
Parents are less likely to be concerned about safety on public transportation and spreadability of COVID-19 among large groups and are more likely to be concerned about the impact of COVID-19 in foreign countries or spread by foreign groups of people.



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 4: Parents n=273, Non-Parents n=233

When determining where and when it is safe to travel, parents are less likely to trust governments of places they're considering visiting or news outlets, and are more likely to trust online travel agents, airlines, and social media.





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.)
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 4: Parents n=273, Non-Parents n=233

Appendix

Participant Profile

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)	Wave 4 (n=506)
Age	18-24	13.7%	13.9%	14.0%	13.8%
	25-34	28.6%	28.3%	29.8%	29.1%
	35-44	11.6%	12.3%	11.2%	11.5%
	44-54	18.0%	19.8%	19.0%	20.2%
	55-64	19.2%	17.8%	18.0%	15.6%
	65-74	8.2%	6.9%	7.0%	8.5%
	75 or older	0.6%	1.0%	1.0%	1.4%
	Mean	42.4	42.1	41.9	42.2
	Median	39.5	39.5	39.5	39.5
Gender	Male	53.9%	54.5%	55.0%	54.3%
	Female	45.3%	43.2%	42.8%	41.9%
	Other	0.8%	2.2%	2.2%	3.8%
Income	Under $35,000	15.7%	15.0%	15.6%	14.2%
	$35,000-$49,999	22.5%	23.6%	23.4%	23.2%
	$50,000-$74,999	19.6%	19.8%	20.0%	19.8%
	$75,000-$99,999	17.6%	17.8%	17.4%	17.8%
	$100,000-$149,999	14.9%	14.3%	15.8%	15.8%
	$150,000-$199,999	4.9%	5.9%	4.2%	4.5%
	$200,000-$249,999	2.2%	1.4%	0.6%	1.8%
	$250,000 or more	2.4%	1.6%	1.6%	2.0%
	Prefer not to answer	0.2%	0.6%	1.4%	.8%
	Mean	$78,707.80	$76,767.50	$74,289.60	$78,087.20
	Median	$62,499.50	$62,499.50	$62,499.50	$62,499.50

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)	Wave 4 (n=506)
U.S. Region	Northeast	14.7%	15.2%	12.4%	11.9%
	Midwest	15.5%	13.3%	15.2%	14.0%
	South	40.8%	37.8%	39.0%	37.9%
	West	29.0%	33.5%	32.6%	35.2%
Income	Married	64.7%	60.0%	67.2%	69.2%
	Single, never married	24.7%	30.3%	23.6%	20.2%
	Divorced	6.1%	7.7%	6.0%	6.5%
	Widowed	2.7%	1.2%	1.4%	1.6%
	Separated	1.0%	0.4%	0.8%	1.4%
	Other (specify)	0.8%	0.4%	1.0%	.8%
Education	High school diploma or GED	5.9%	7.7%	5.8%	3.4%
	Trade or technical school certificate	4.3%	3.0%	2.4%	1.4%
	Associate Degree	11.4%	8.7%	7.4%	6.7%
	Some college	6.9%	10.7%	9.2%	8.3%
	Bachelor’s degree	55.7%	51.9%	57.8%	60.5%
	Graduate degree	15.9%	18.0%	17.4%	19.6%
Employment Status	Work full time	74.9%	72.7%	74.8%	76.3%
	Work part time	7.8%	8.3%	10.0%	9.5%
	Self-employed	7.6%	8.1%	8.2%	7.5%
	Retired	5.3%	6.7%	5.2%	7.5%
	Student	3.1%	2.6%	2.6%	1.8%
	Homemaker	1.8%	2.0%	2.2%	2.2%
	Unemployed, looking for work	1.57%	3.2%	2.8%	2.2%

Various questions, unweighted data shown

Participant Profile (cont.)

		Wave 1 (n=510)	Wave 2 (n=505)	Wave 3 (n=500)	Wave 4 (n=506)
Presence of Children	Yes	49.0%	43.6%	49.8%	54.0%
	No	51.0%	56.4%	50.2%	46.0%
Travel in Past 2 Years	Has Taken A Domestic Leisure Trip	83.9%	84.4%	82.4%	77.7%
	Has Taken an International Leisure Trip	38.0%	38.6%	37.8%	40.9%

 Various questions, unweighted data shown

Thank you.