

TO: U.S. Travel Association
FR: Morning Consult
DT: May 9, 2022
RE: Pre-Departure COVID-19 Testing Requirements

U.S. TRAVEL
 ASSOCIATION®

Survey responses from vaccinated international travelers in key European and Asian markets indicate **pre-departure testing requirements** imposed by the federal government **have a considerable impact** on would-be travelers' likelihood of visiting the United States. Data presented below contains equal shares of respondents from France, Germany, the United Kingdom, Japan, South Korea, and India.

OPINIONS OF PRE-DEPARTURE TESTING REQUIREMENTS

Pre-departure testing requirements are deterring international travelers from visiting the United States.

- Most international travelers surveyed (57%) say the **risk of testing positive [following the required pre-departure testing]** for COVID-19 makes them less likely to travel to the United States, including 16% who say it makes them *much less likely* to do so.
- **More than half of international travelers (54%)** said the added uncertainty of potentially having to cancel a trip due to U.S. pre-departure testing requirements would have a big impact on their likelihood to visit the U.S., including one in five who indicated the risk of having to cancel would have a major impact.
- Conversely, forty-six percent of international travelers would be **more likely to visit** the United States if pre-departure testing requirements for vaccinated adults were lifted – nearly four-times the share that say they would be *less likely* if the requirement ended (12%).

● Much more likely ● Somewhat more likely ● No difference in my likelihood ● Somewhat less likely ● Much less likely



- Nearly half of past international travelers (47%) that are unlikely to travel abroad in the next twelve months report that pre-departure testing requirements to enter a country contribute to their unlikeliness of doing so.

TRAVEL AND SPENDING PRIORITIES

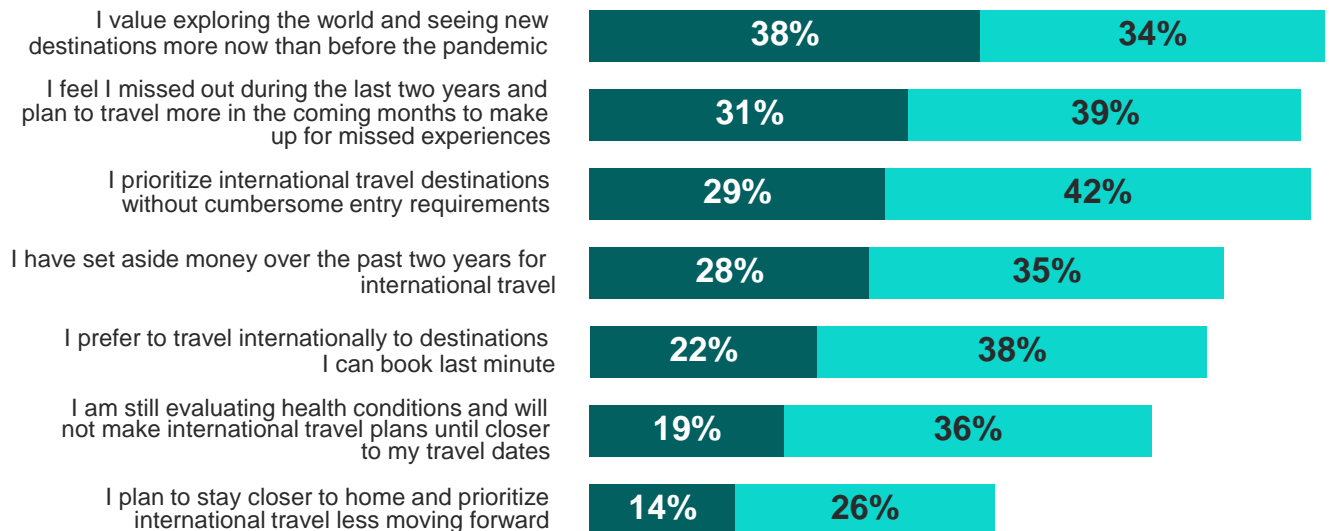
When it comes to discretionary spending, consumers prioritize budgeting for travel – especially traveling abroad.

- Across eight spending categories tested, adults surveyed rated **international travel** as their **#1 budget priority** more often than anything else.
- More than half of adults surveyed rate **international travel** (66%) and **domestic trips** (54%) as top-three budget priorities for their households.

The pandemic has strengthened the resolve to travel internationally for those who have done so in the past five years.

- Seventy-two percent of adults surveyed value **exploring the world** now more than before the COVID-19 pandemic.
- Seven in ten international travelers surveyed (70%) feel a need to **make up for experiences** they missed out on due to pandemic-era travel restrictions and health concerns.

● Strongly agree ● Somewhat agree



- A large majority of adults surveyed (71%) agree they prioritize traveling to destinations without cumbersome entry requirements, including twenty-nine percent who *strongly agree*.

Methodology: This poll was conducted May 3 to May 4, 2022 among a sample of 1801 adults from France, Germany, the United Kingdom, South Korea, Japan, and India that are fully vaccinated against COVID-19 (or planning to be) and have traveled internationally in the past five years. Interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.