



JULY 2020 – Wave VI

TRAVEL INTENTIONS PULSE SURVEY (TIPS)

Impact of COVID-19

OVERVIEW

MMGY Global Travel Intelligence conducts this ongoing tracking survey to monitor the impact of COVID-19 on the travel intentions of U.S. adults. Each release presents the most current data on prevailing travelers' attitudes and expected changes in their travel behavior as a result of COVID-19.



Better insights. **SMARTER STRATEGY.**

MMGY Travel Intelligence specializes in syndicated and custom market research exclusively for the travel and tourism industry. We boast the industry's most expansive and richest historical database and strive to provide the highest-quality travel and traveler research.

Our mission is to provide clients with valuable insights they can apply to improve their results. Our portfolio of products and services is designed to power travel industry decision-makers through consumer insights, travel performance data, and audience modeling and segmentation.



Survey Methodology

- A random sample of 1,200 respondents representing the U.S. population defined below participates in this online survey each month. Respondents are screened as follows:
 1. 18 years of age or older;
 2. Have taken at least one overnight trip for either business or leisure during the past 12 months
- Data were collected for this wave between June 29 – July 8, 2020.
- The error interval of the statistical estimates appearing in this report (for n=1,200) is +/- 2.8% at the 95% level of confidence.



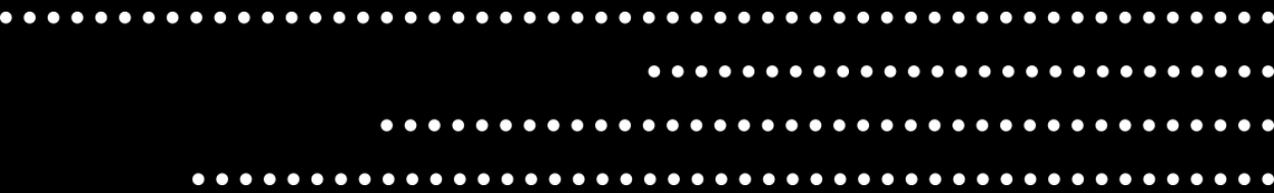
/ Key Findings

- Despite the nationwide increase in COVID-19 cases, consumers' concern about contracting the virus has not increased in the latest survey results.
- This may be the reason that the likelihood of taking a domestic leisure trip within the next six months remains at 40%. More than that (64%) say they expect to book a leisure trip within the next 6 months.
- However, the likelihood to engage in outdoor activities such as visiting a park or a beach on vacation declined in Wave VI. The perceived safety of these activities also declined, which may be attributable to incessant news coverage highlighting crowded beaches.
- Those that were already hesitant to travel, however, are becoming even more cautious. In the most recent survey, 21% indicate they are not at all likely to take a leisure trip in the next six months—up from just 13% in Wave V.
- Although the intent to take a domestic leisure trip remained constant, those expecting to travel for domestic business declined considerably. In the most recent survey, only one-third of confirmed business travelers indicated a likelihood to take a domestic business trip in the next six months—down from 40% in Wave V.



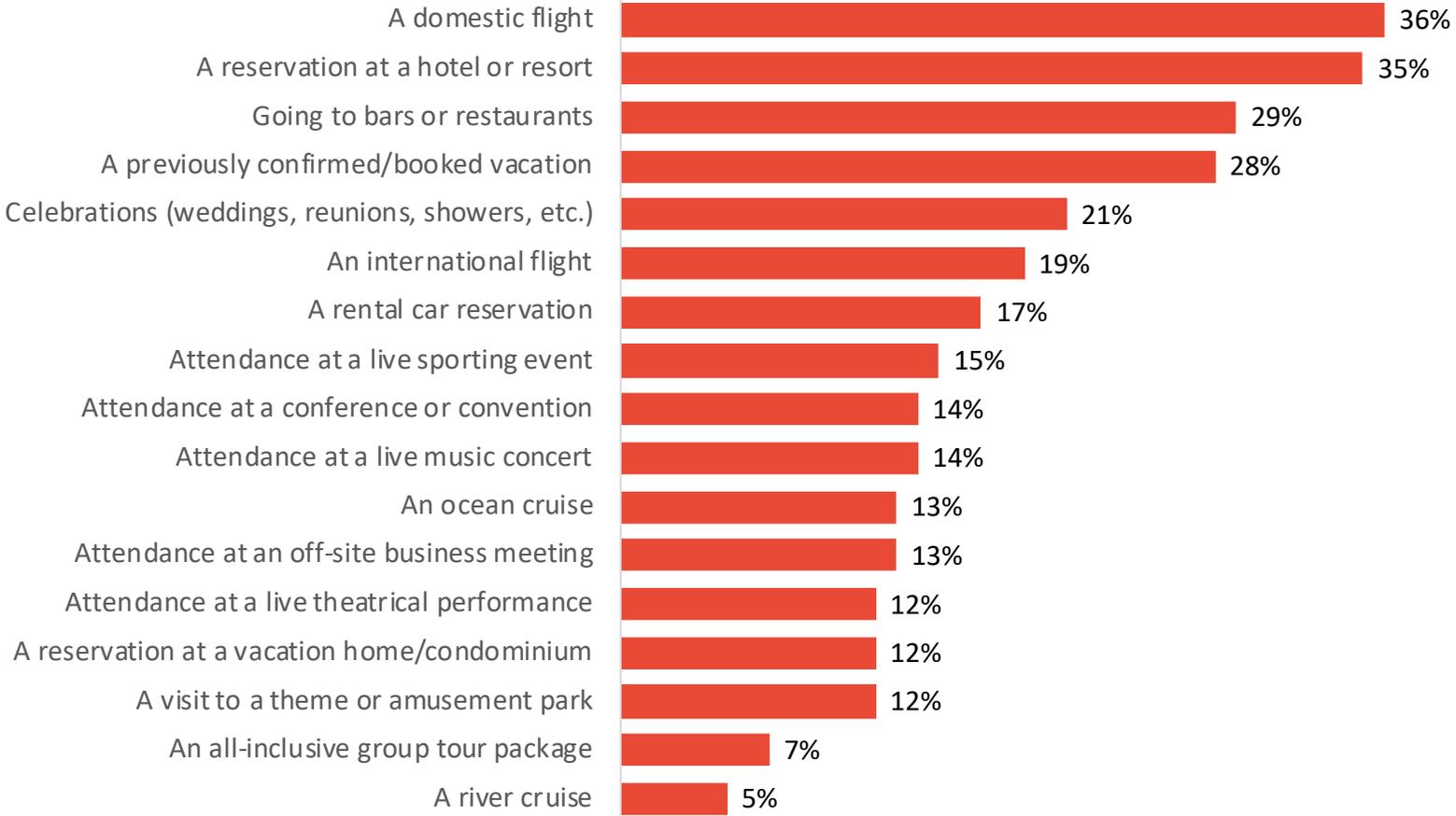
/ Key Findings

- International travel intent remains low as only one in five travelers (22%) say they are likely to take an international leisure trip during the next six months—down slightly from the previous wave (24%). Of course, the EU’s recent ban on travel from the U.S. may be contributing to this trend.
- Travelers continue to report being twice as likely to travel by personal car (67%) than by any other form of transportation. And one-third of those respondents are likely to drive 300 miles or more each way from home for a vacation with one in five willing to travel 500 miles or more.
- Travelers are still reluctant to board a plane. However, those that are willing are much more likely to take a domestic flight (31%) than an international flight (20%).
- After an increase in Wave V, the likelihood of staying in a hotel/resort or vacation home leveled off in this wave. This reinforces the fact that the industry still faces strong headwinds on the path to recovery.



IMPACT OF COVID-19 ON TRAVEL PLANS

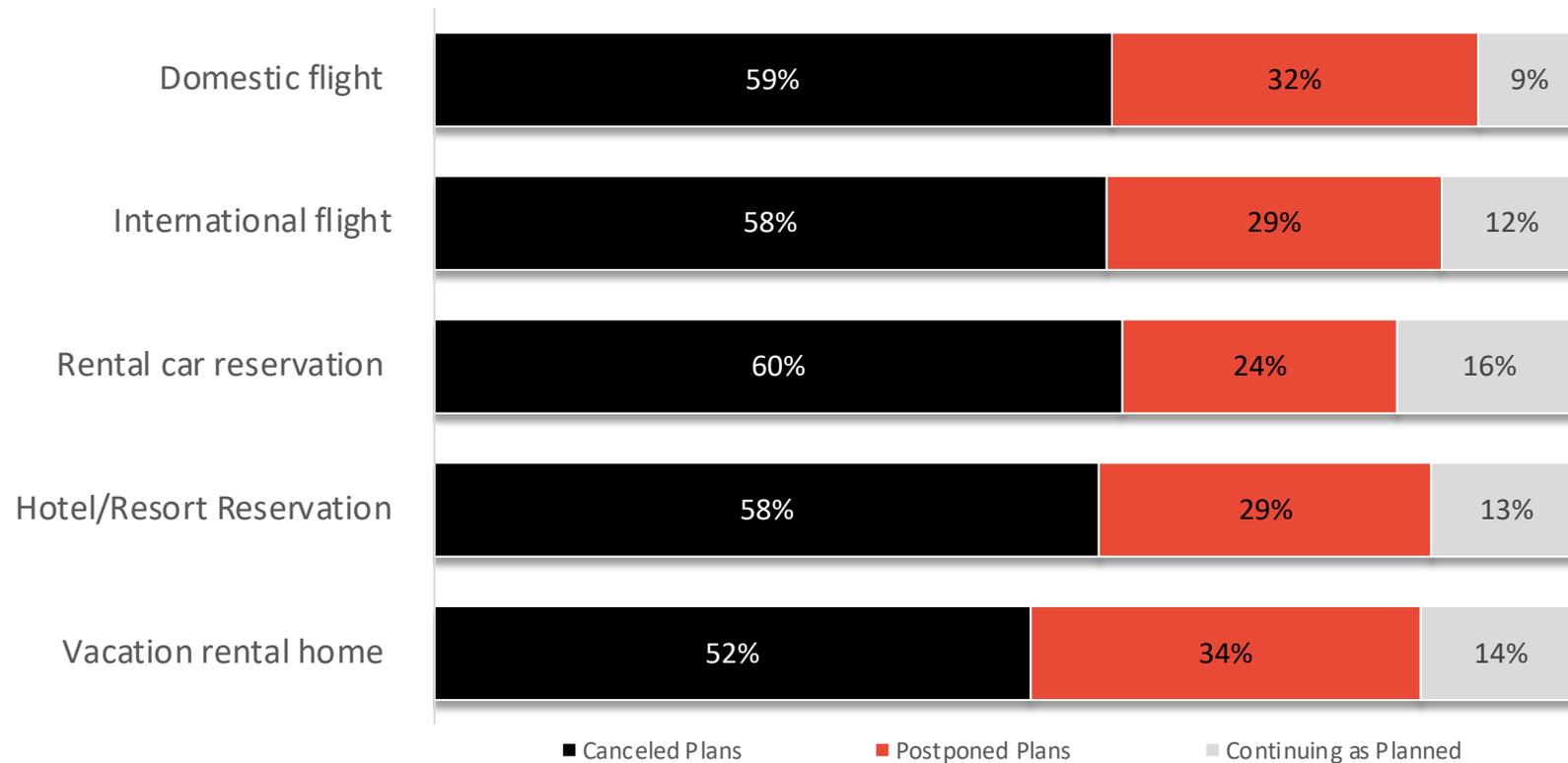
Percentage of Respondents Who Planned to Engage in Each of These Activities Prior to COVID-19



Question / Prior to the coronavirus (COVID-19) outbreak, which of the following were you confirmed/booked to do for a date or timeframe occurring after the coronavirus (COVID-19) outbreak? (n=1,200)

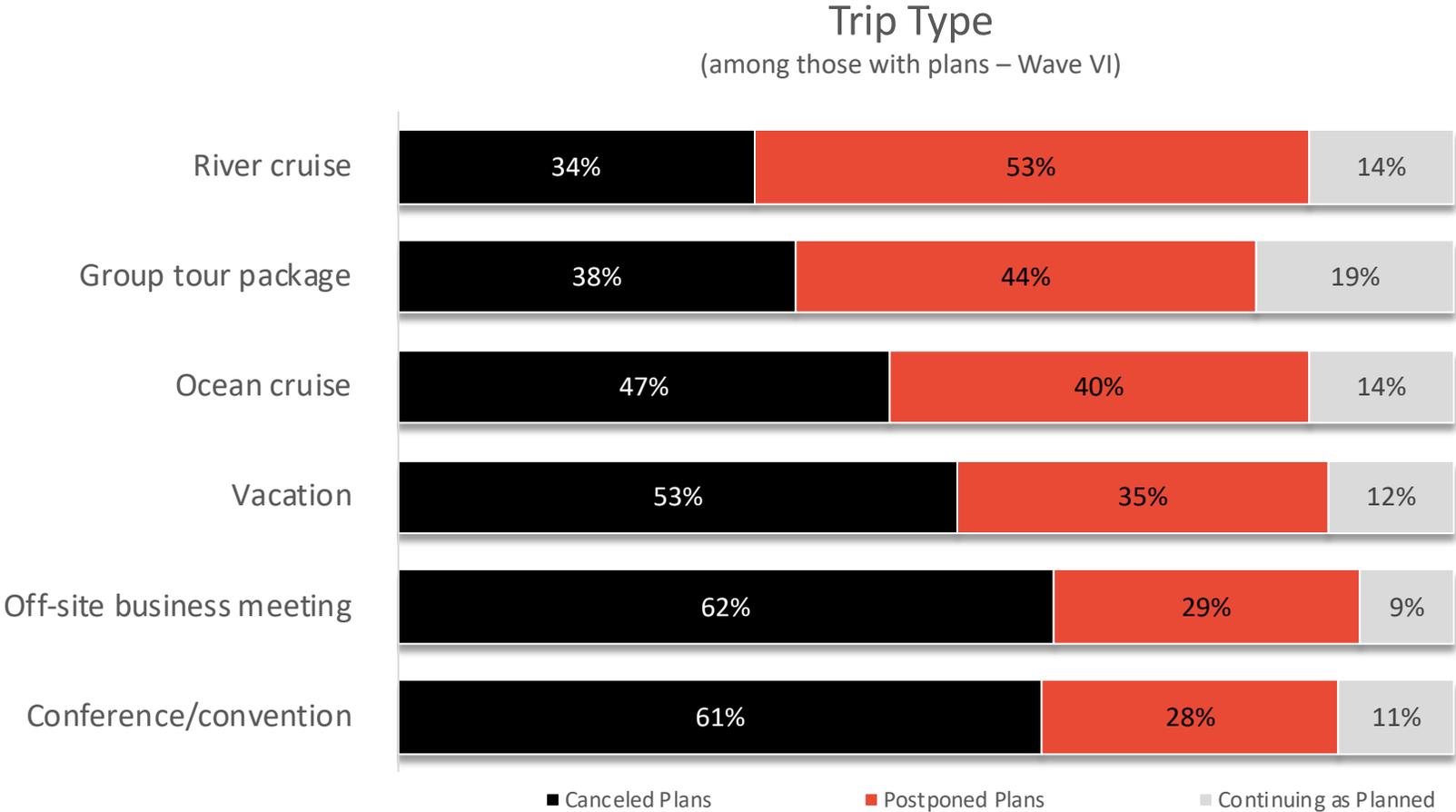
About One-third of Consumers Postponed Rather Than Canceled Flights and Lodging Booked Prior to COVID-19

Transportation and Lodging
(among those with plans – Wave VI)



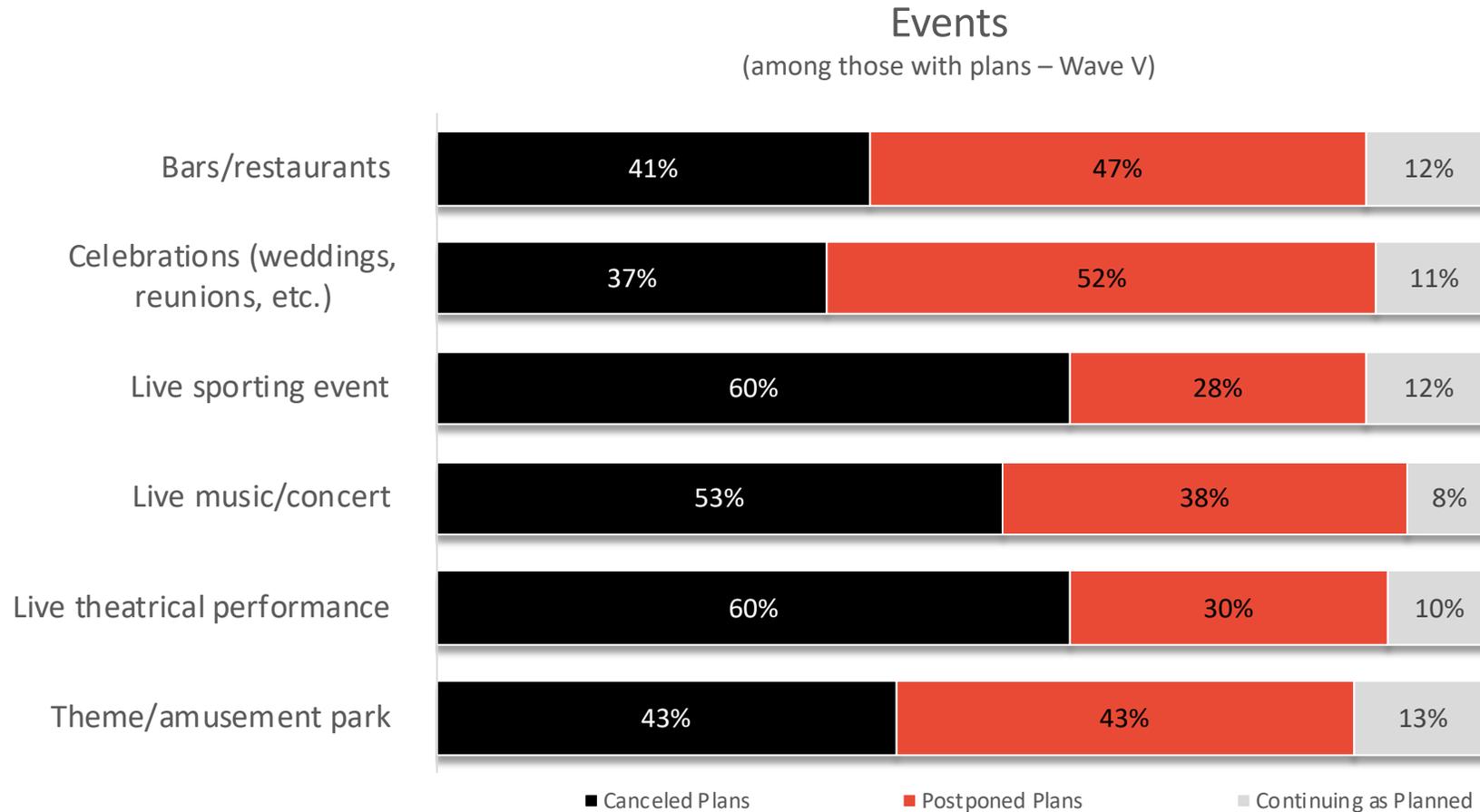
Question / Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned? (n=1,200)

The Majority of Vacation and Business Trips Have Been Canceled Rather Than Postponed



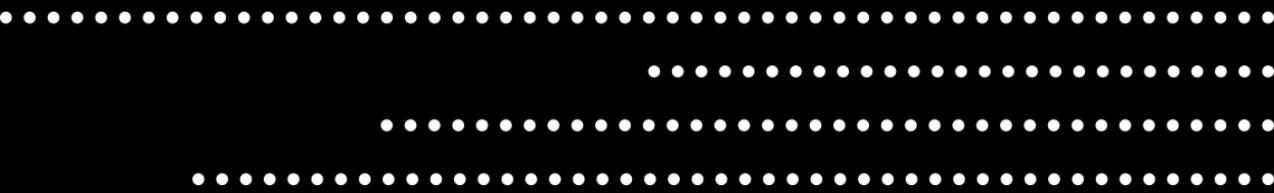
Question / Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned? (n=1,200)

Attendance at Live Events is More Likely to Have Been Canceled Than Postponed*



*This is likely due to the cancellation of most live events.

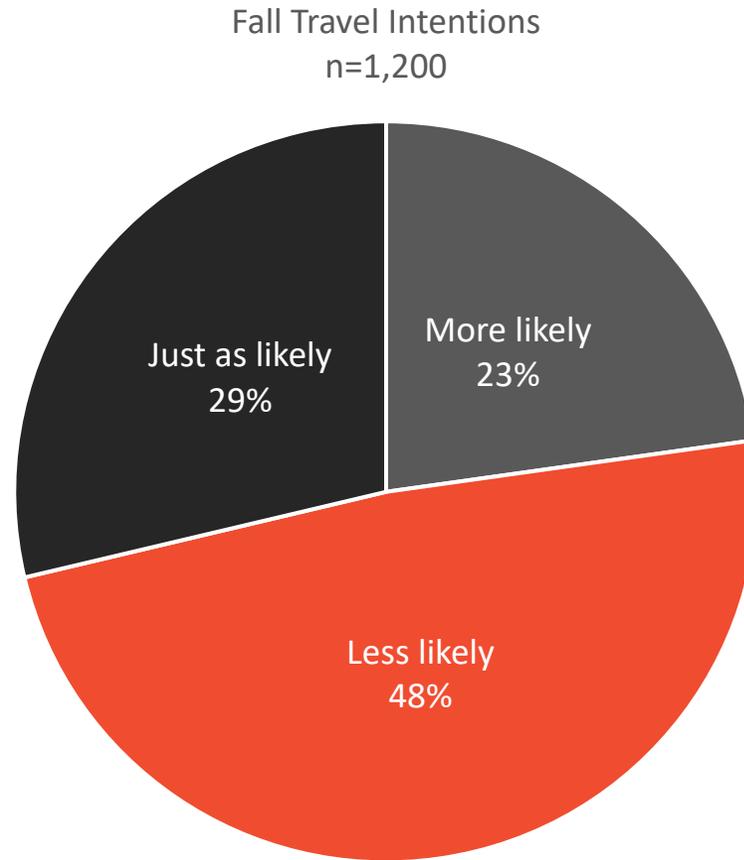
Question / Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned? (n=1,200)



TRAVEL INTENTIONS

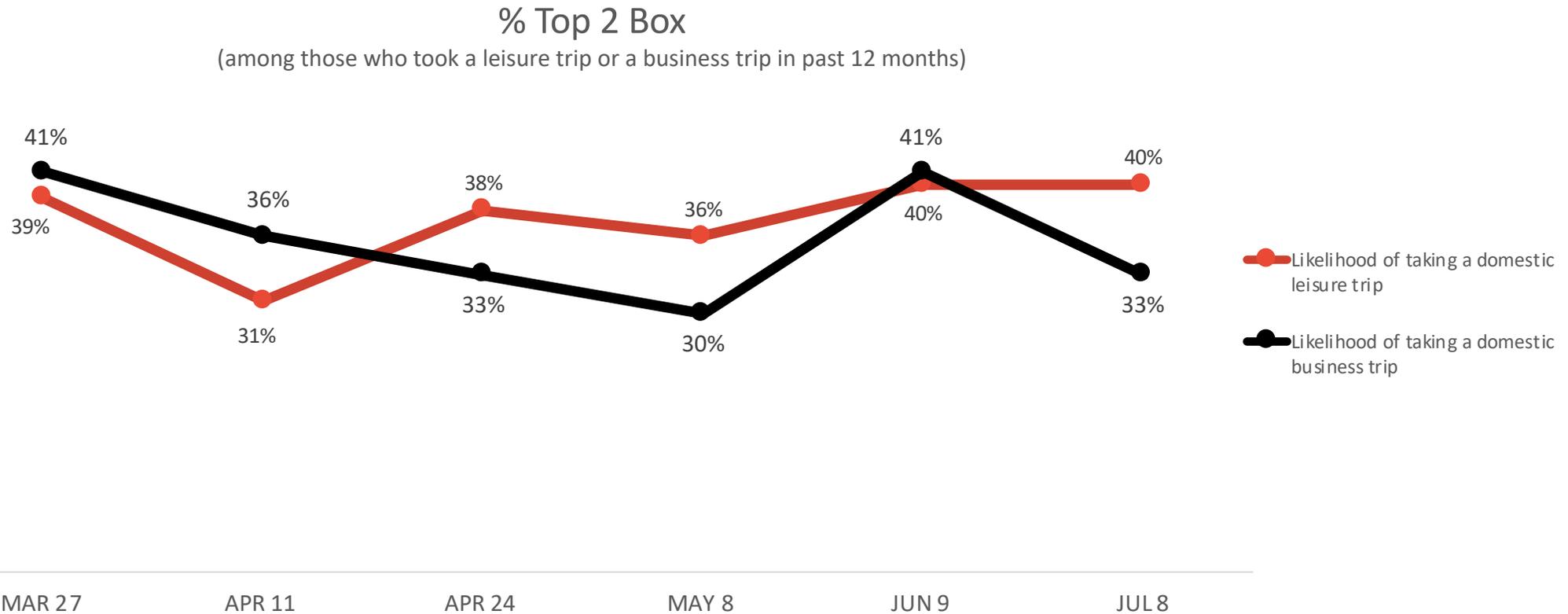
LEISURE AND BUSINESS

More Than Half of Consumers are as Likely or More Likely to Travel This Fall as in Previous Years



Question / Excluding holiday weekends, how likely are you to travel for leisure during the Fall (September 1 through November 30) of this year?

Likelihood of Taking a Domestic Business Trip During the Next Six Months Declined; Leisure Remained Unchanged

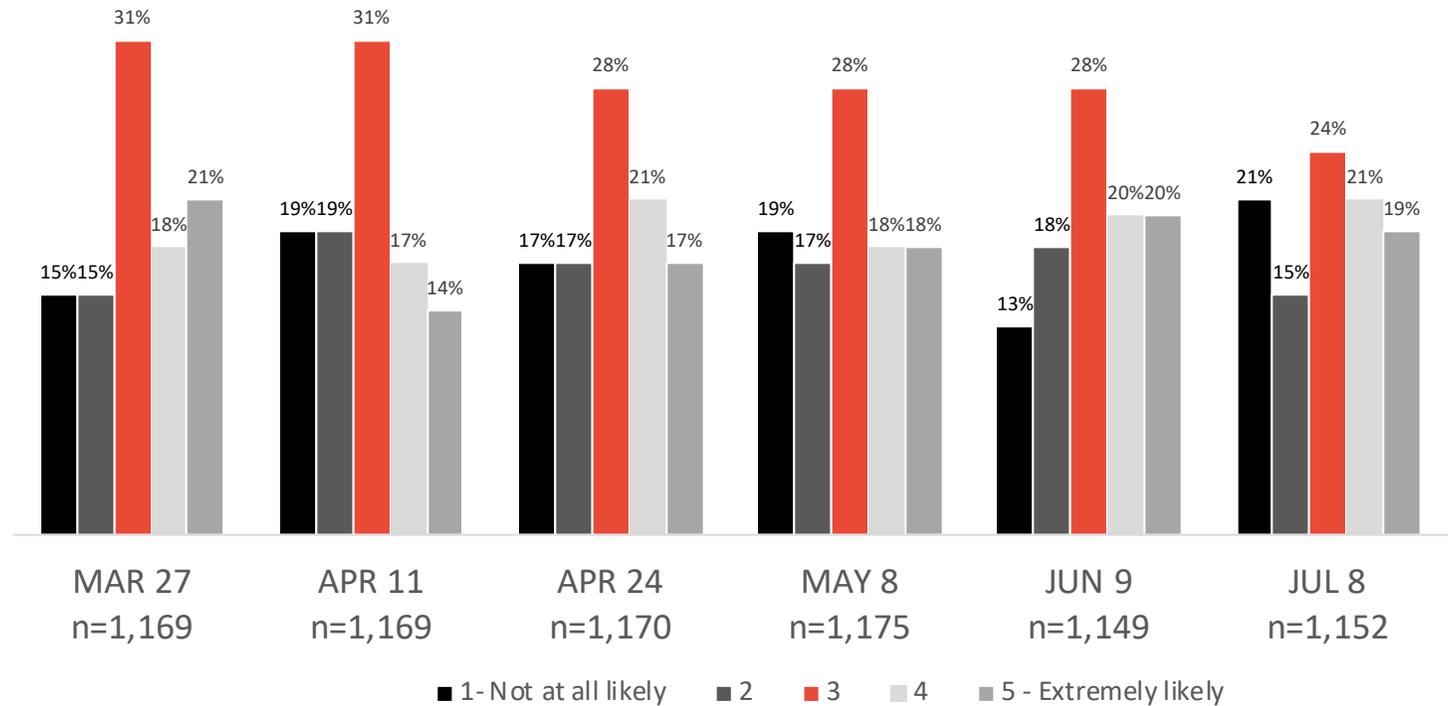


Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months? (n=1,200)



Likelihood of Taking a Domestic Leisure Trip During the Next Six Months is Unchanged

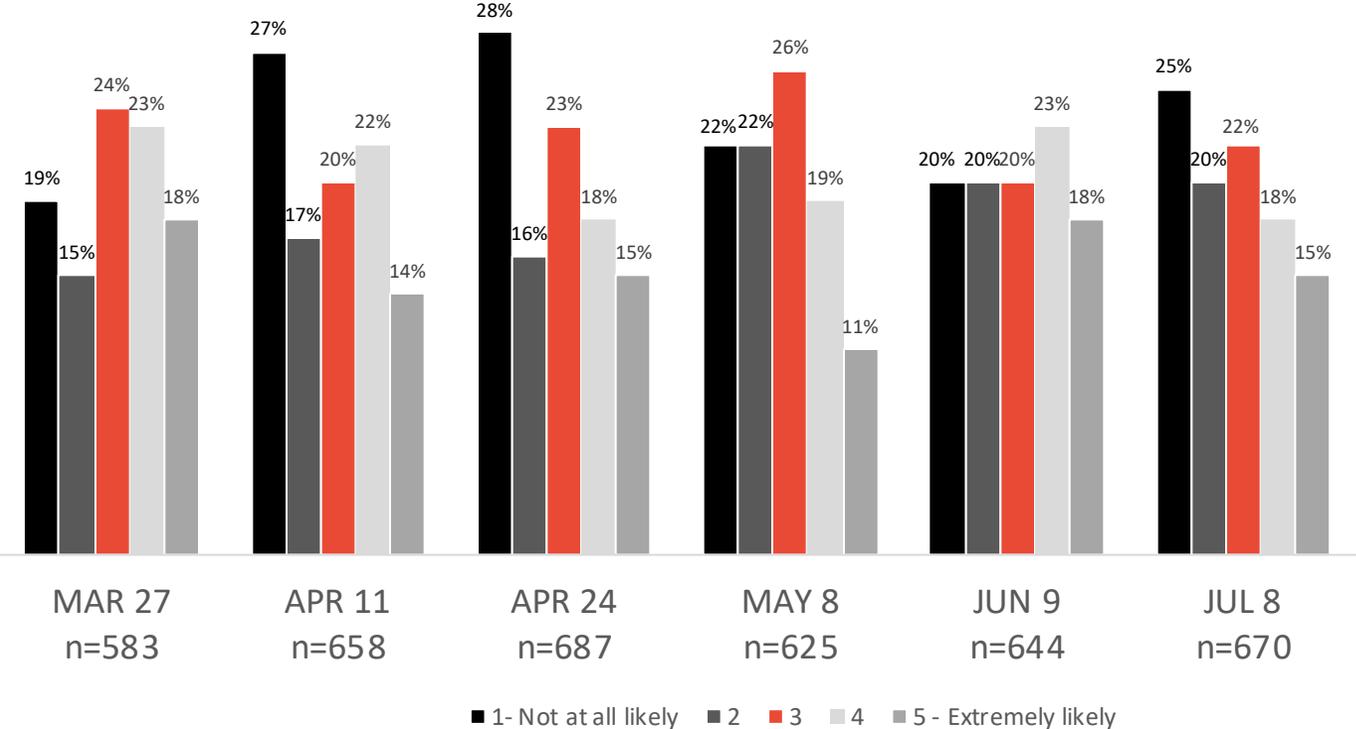
Take a Domestic Leisure Trip
(among those who took a leisure trip in past 12 months)



Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

Likelihood of Taking a Business Trip During Next Six Months Has Decreased Considerably

Take a Domestic Business Trip
(among those who took a business trip in past 12 months)



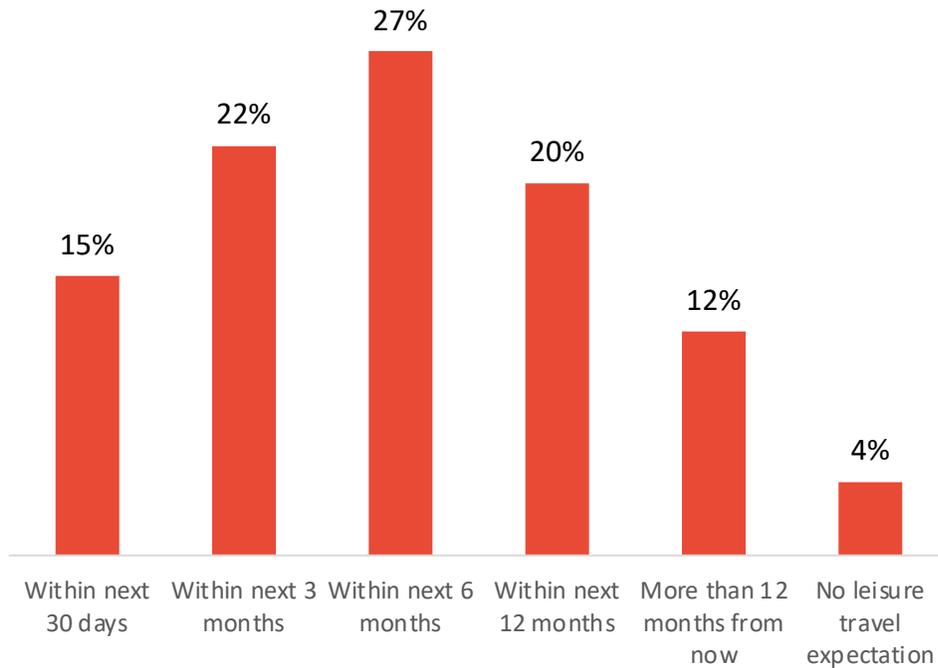
Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?



Two-thirds of Travelers Expect to Book a Leisure Trip Within The Next Six Months

When Expect to Reserve/Book Next Leisure Trip

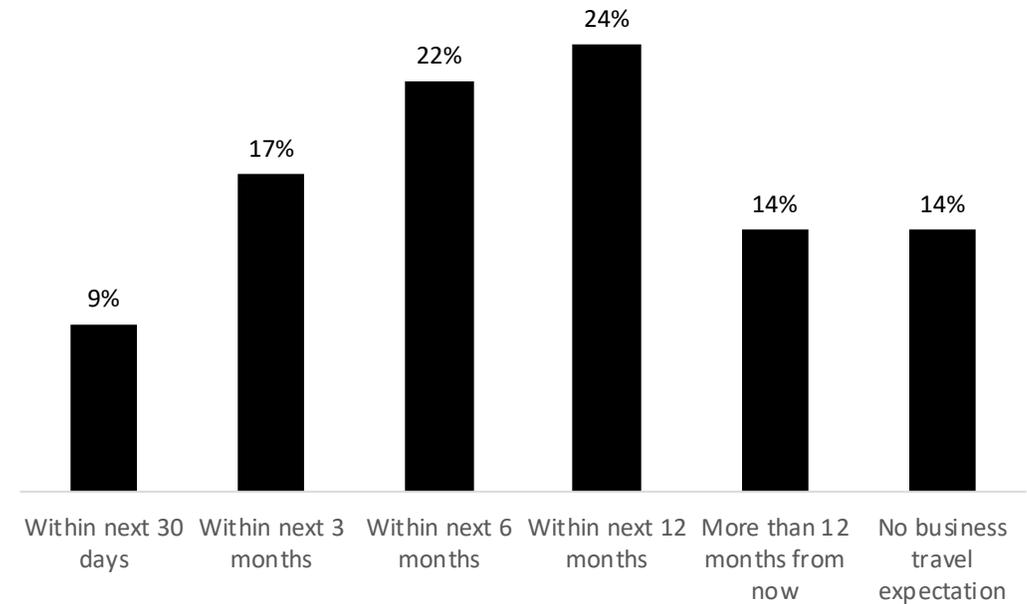
(among those who took a leisure trip in past 12 months)



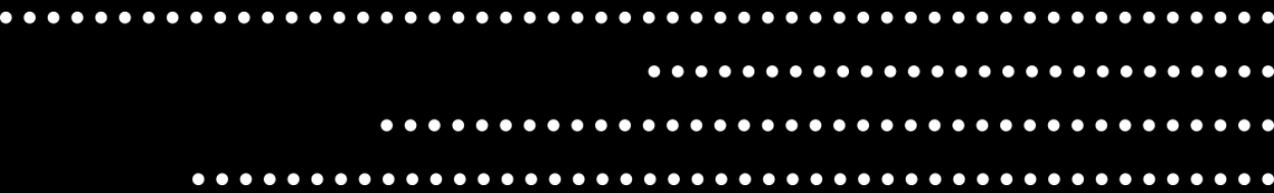
Question / When do you expect to reserve or book your next leisure trip? n=1,152

When Expect to Take Next Business Trip

(among those who took a business trip in past 12 months)



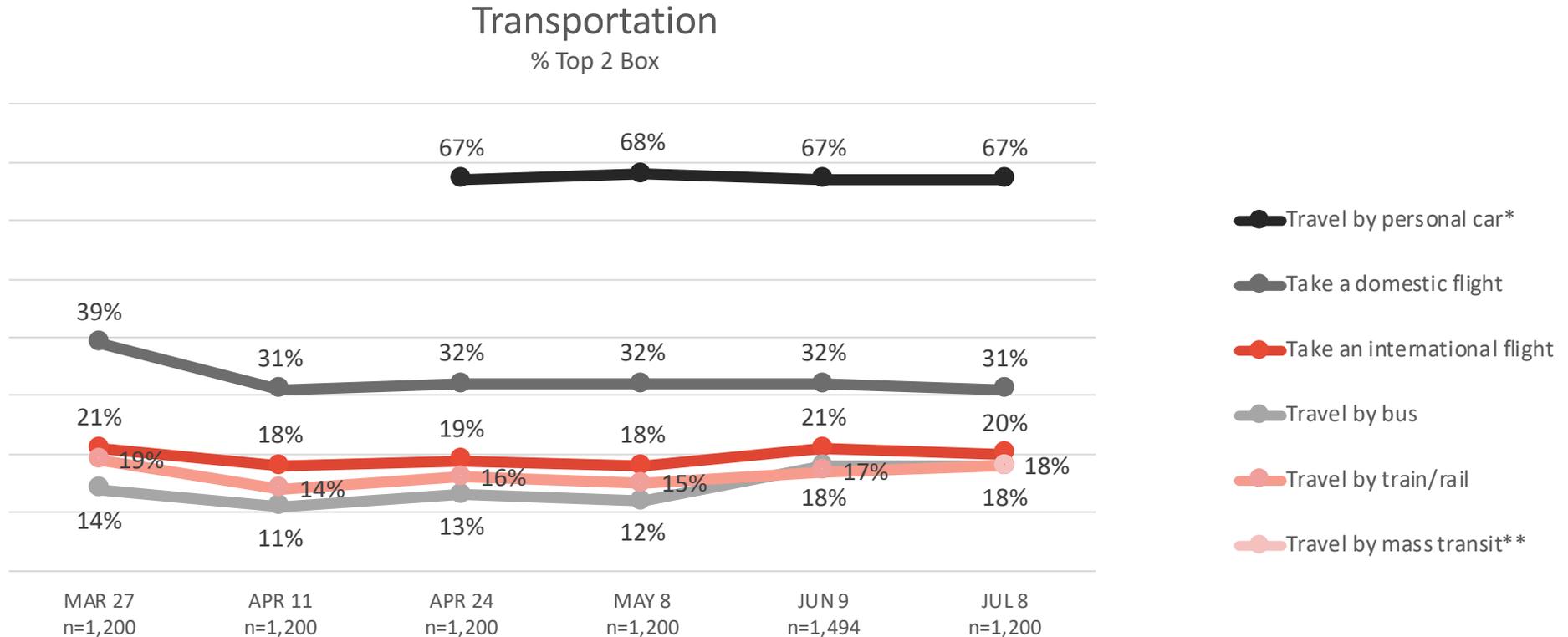
Question / When do you expect to take your next business trip? n=670



TRAVEL INTENTIONS

BY CATEGORY

Consistently, Travelers are More Than Twice as Likely to Travel by Personal Car Than by Air During Next Six Months



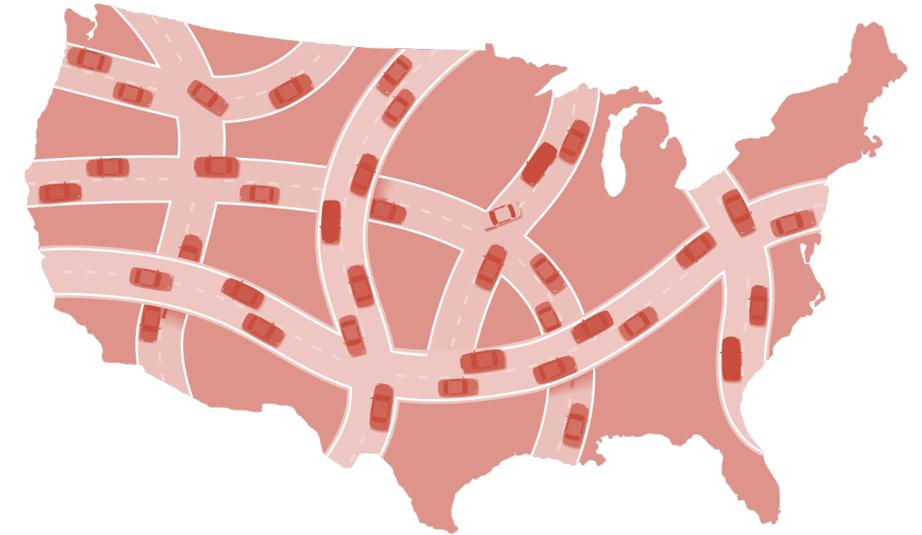
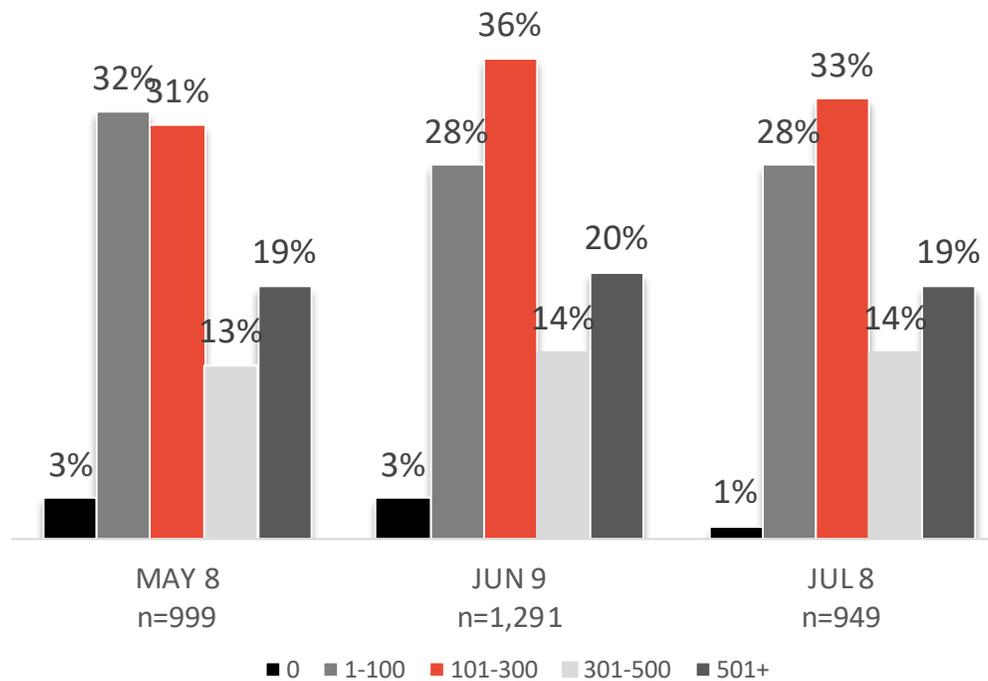
*Added 4/24

**Added 7/8

Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

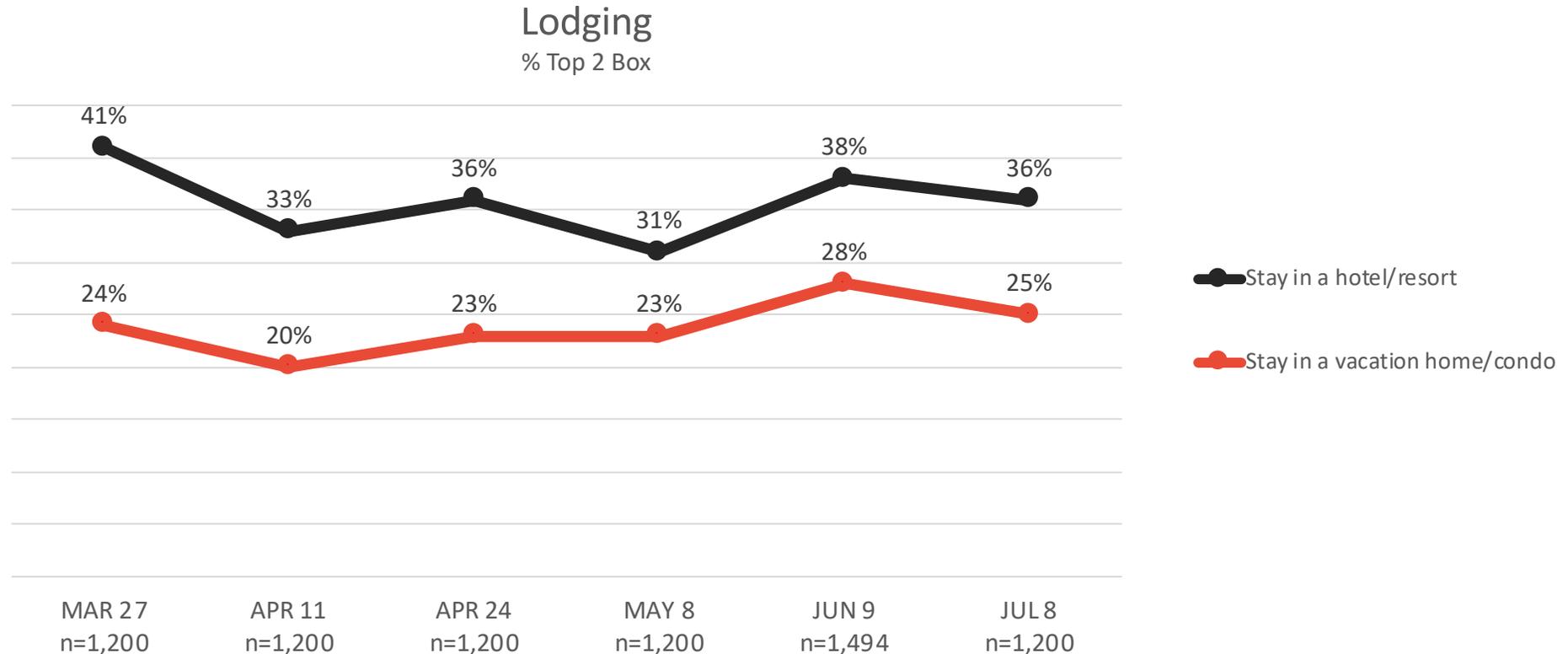
One in Five Travelers is Willing to Drive 500+ Miles (one-way) For a Leisure Trip During Next Six Months

Among Those Likely to Travel by Personal Car During Next 6 Months



Question / You indicated you are likely to travel by personal car during the next 6 months. How many miles away from home (one-way) would you be willing to drive for a leisure trip?

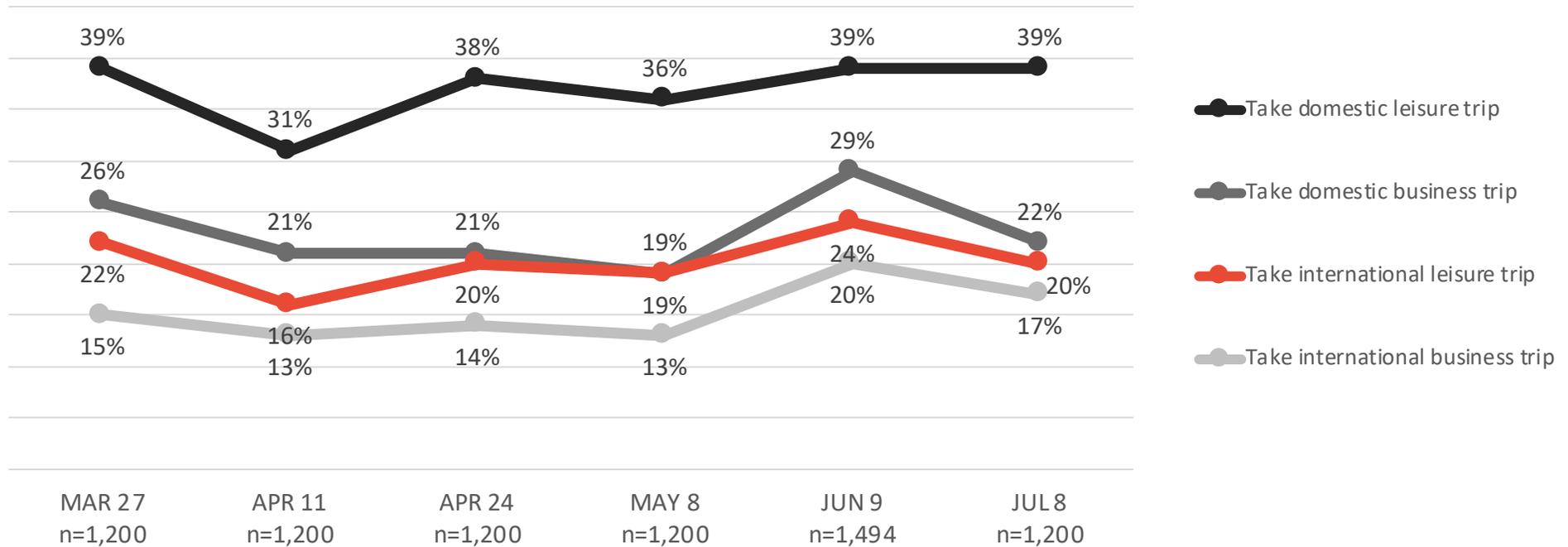
Likelihood of Staying in Hotels, Resorts and Vacation Homes During Next Six Months has Declined Slightly



Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

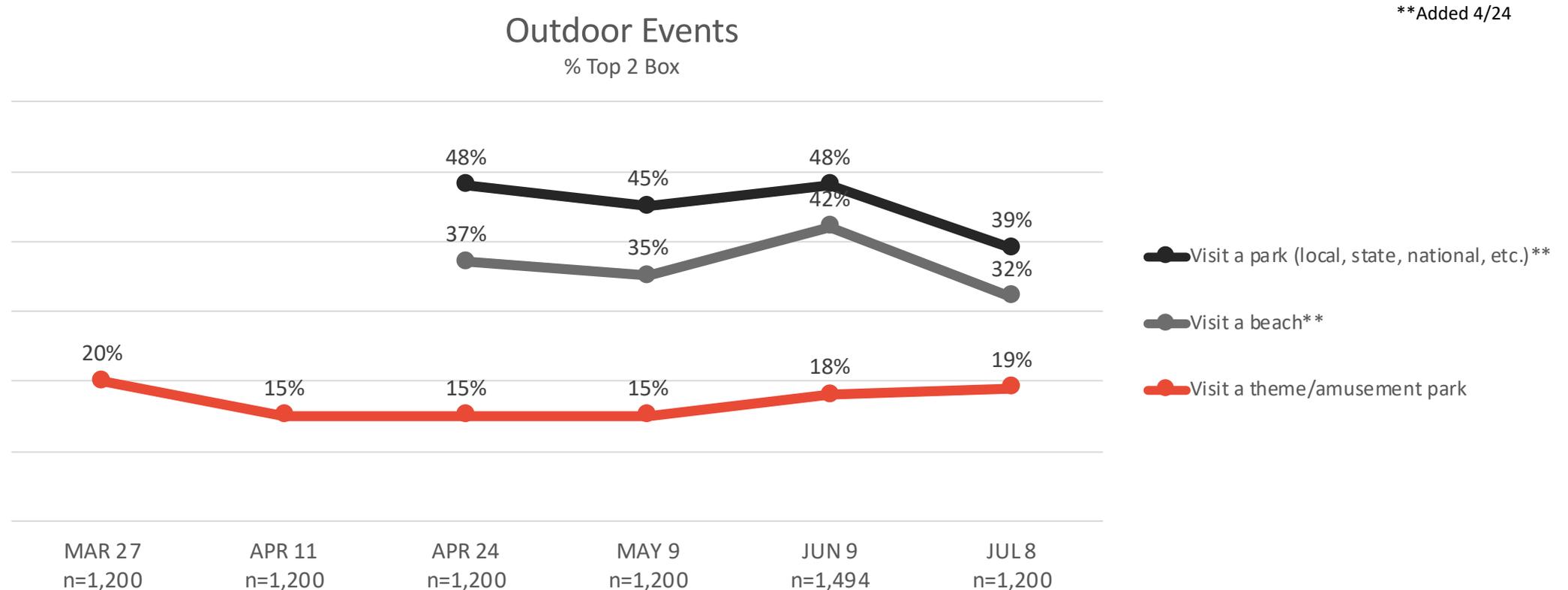
Domestic Leisure Trips Will Lead the Recovery of Demand for Travel Services

Business and Leisure Trip Type
% Top 2 Box



Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

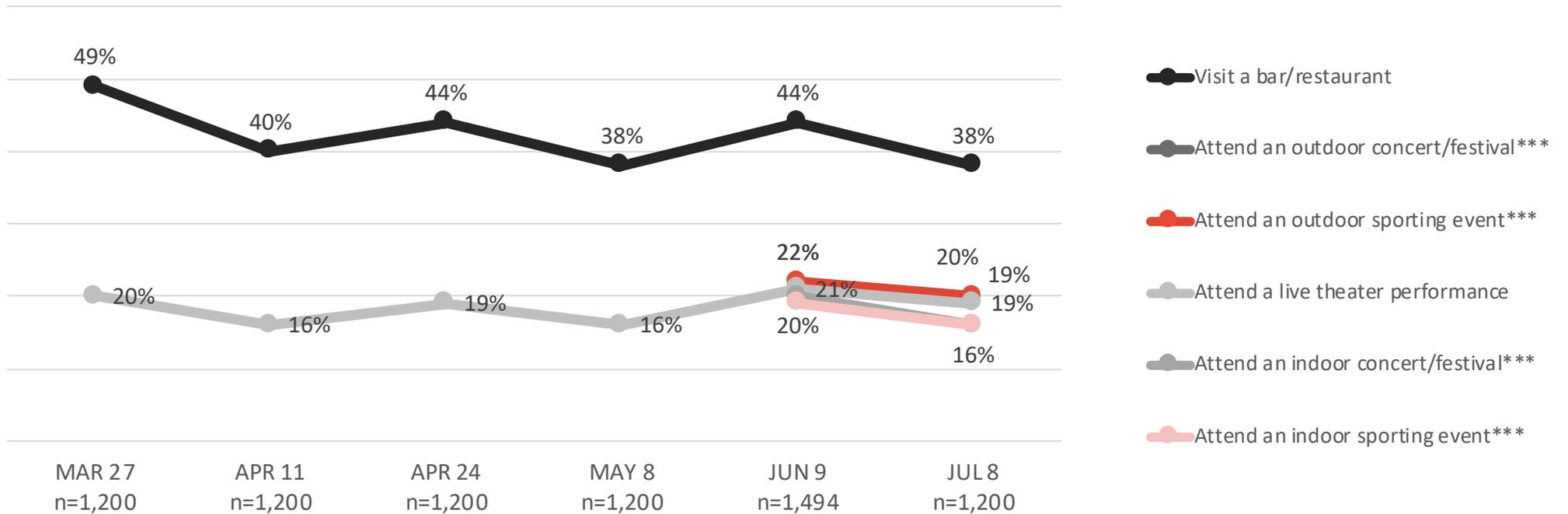
Likelihood of Engaging in Outdoor Activities During the Next Six Months Declined



Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

Likelihood of Visiting a Restaurant or Bar Has Declined

Live Events
% Top 2 Box



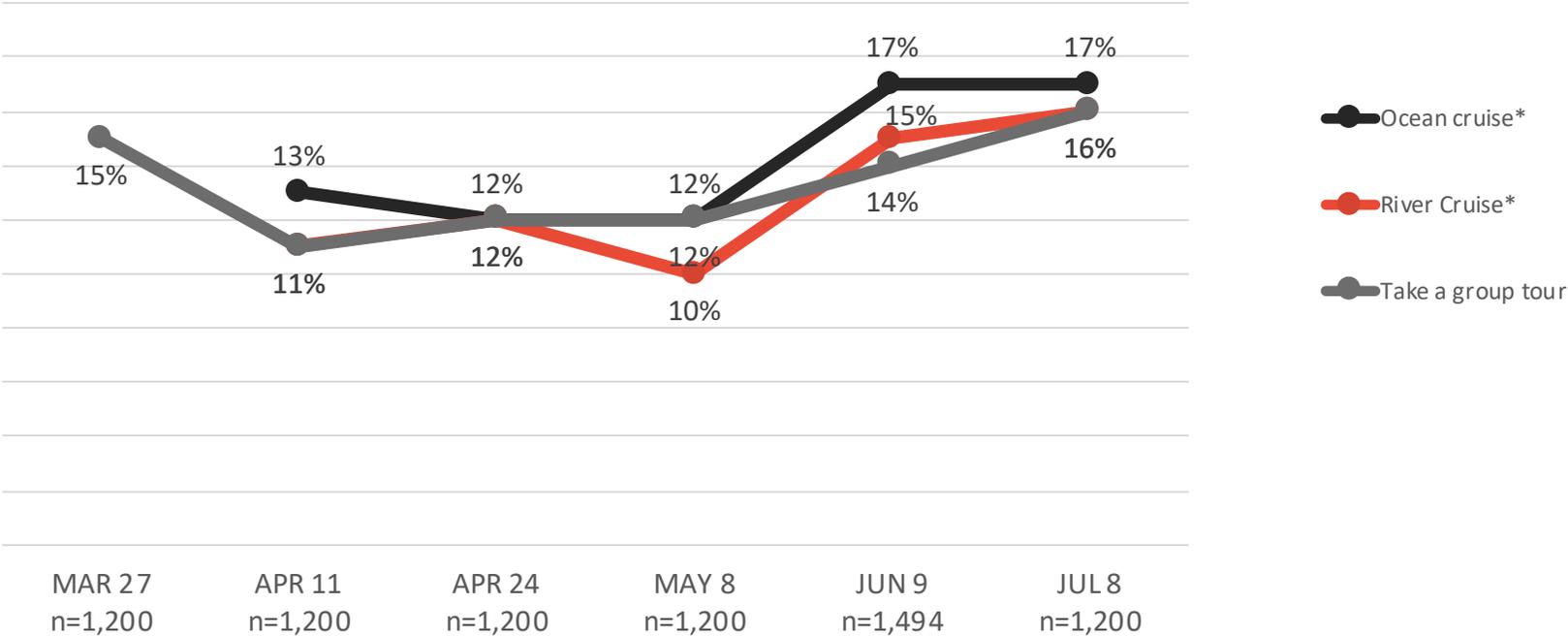
***Added 6/9

Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

Likelihood to Cruise and Take a Group Tour is Relatively Unchanged from Last Wave

Cruise and Group Tour Trip Type
% Top 2 Box

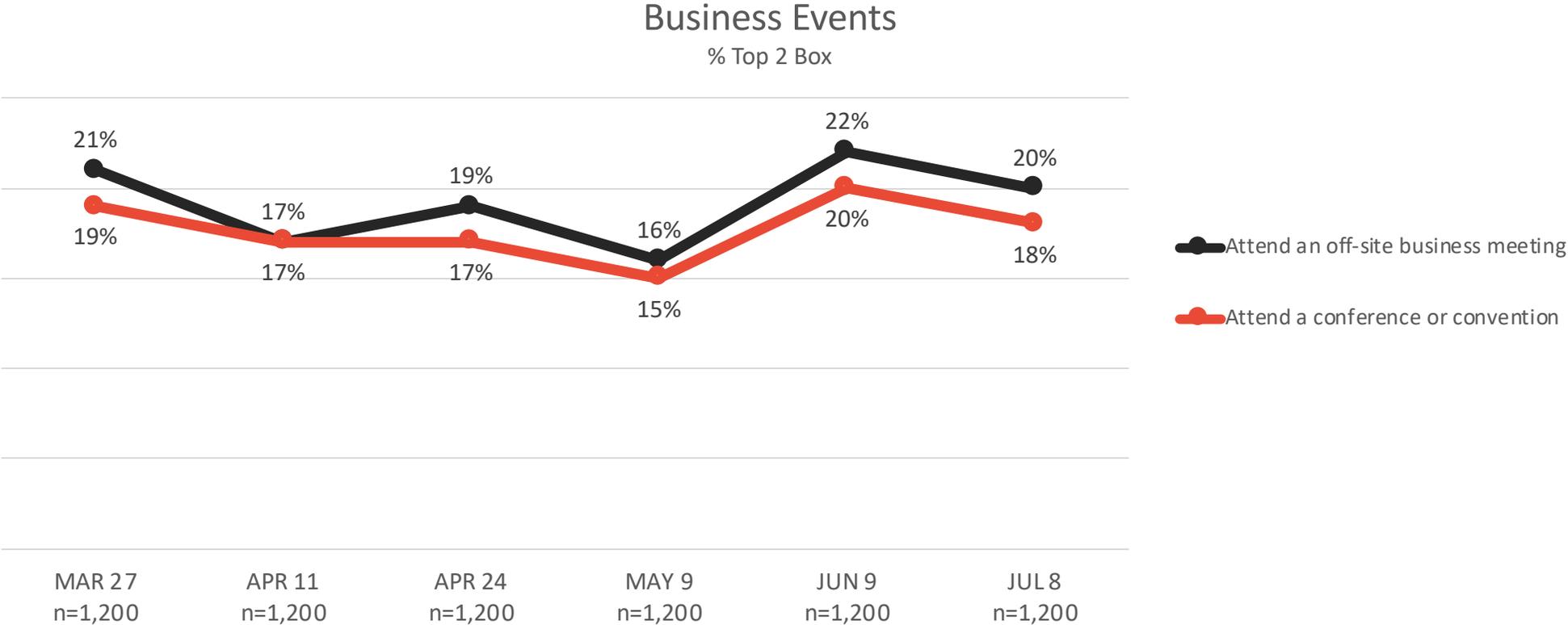
*Added 4/11



Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

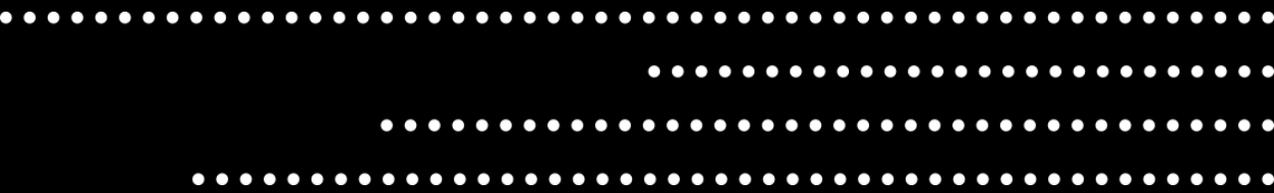


Likelihood of Attending Business Events During the Next Six Months Declined Slightly From Last Wave



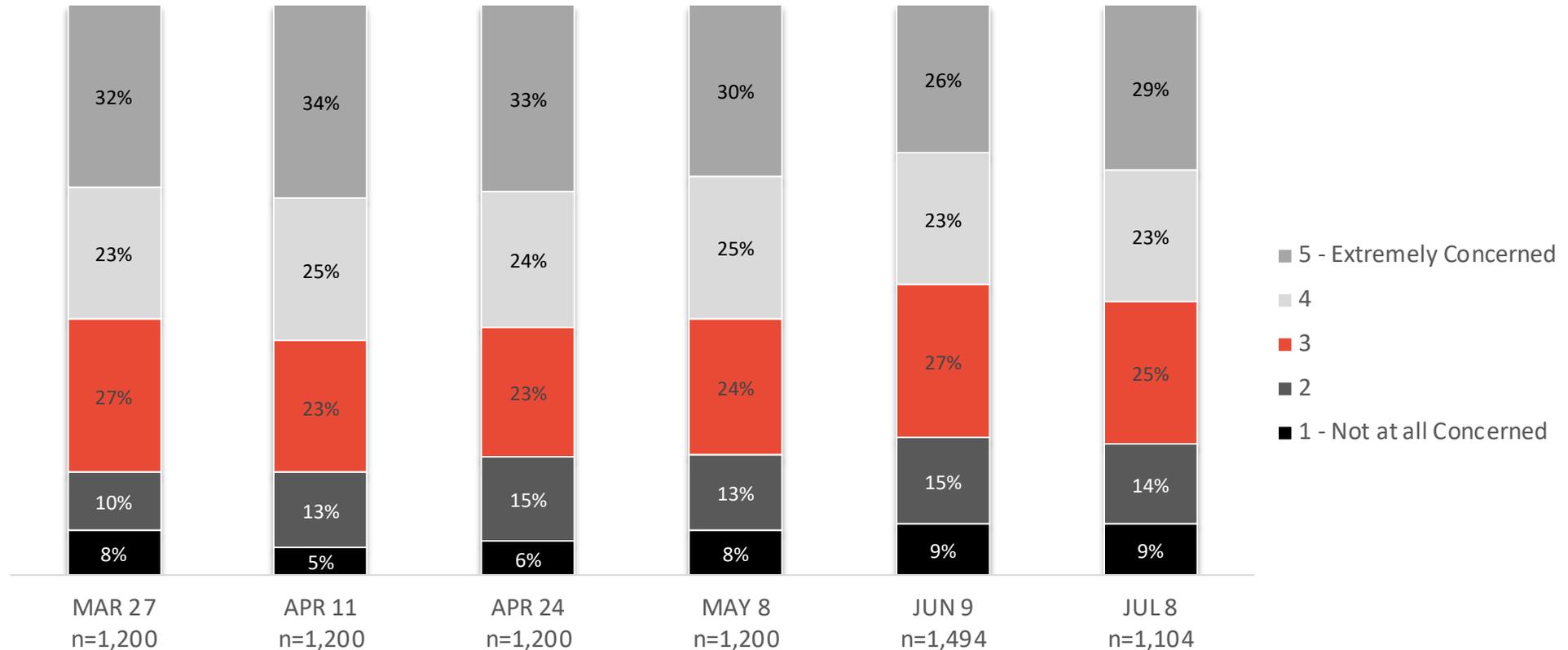
Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?





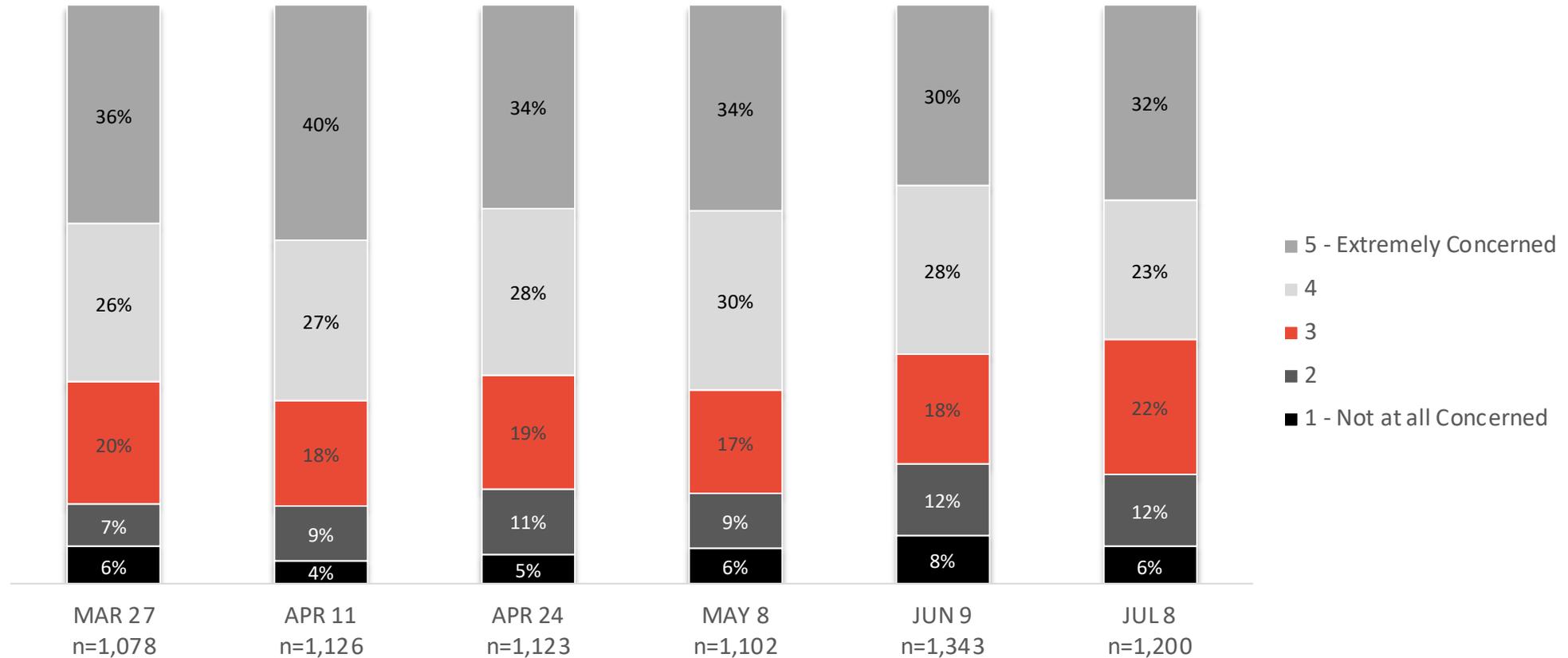
COVID-19 CONCERNS AMONG TRAVELERS

Half of Travelers are Concerned About Personally Contracting COVID-19, Similar to Last Wave



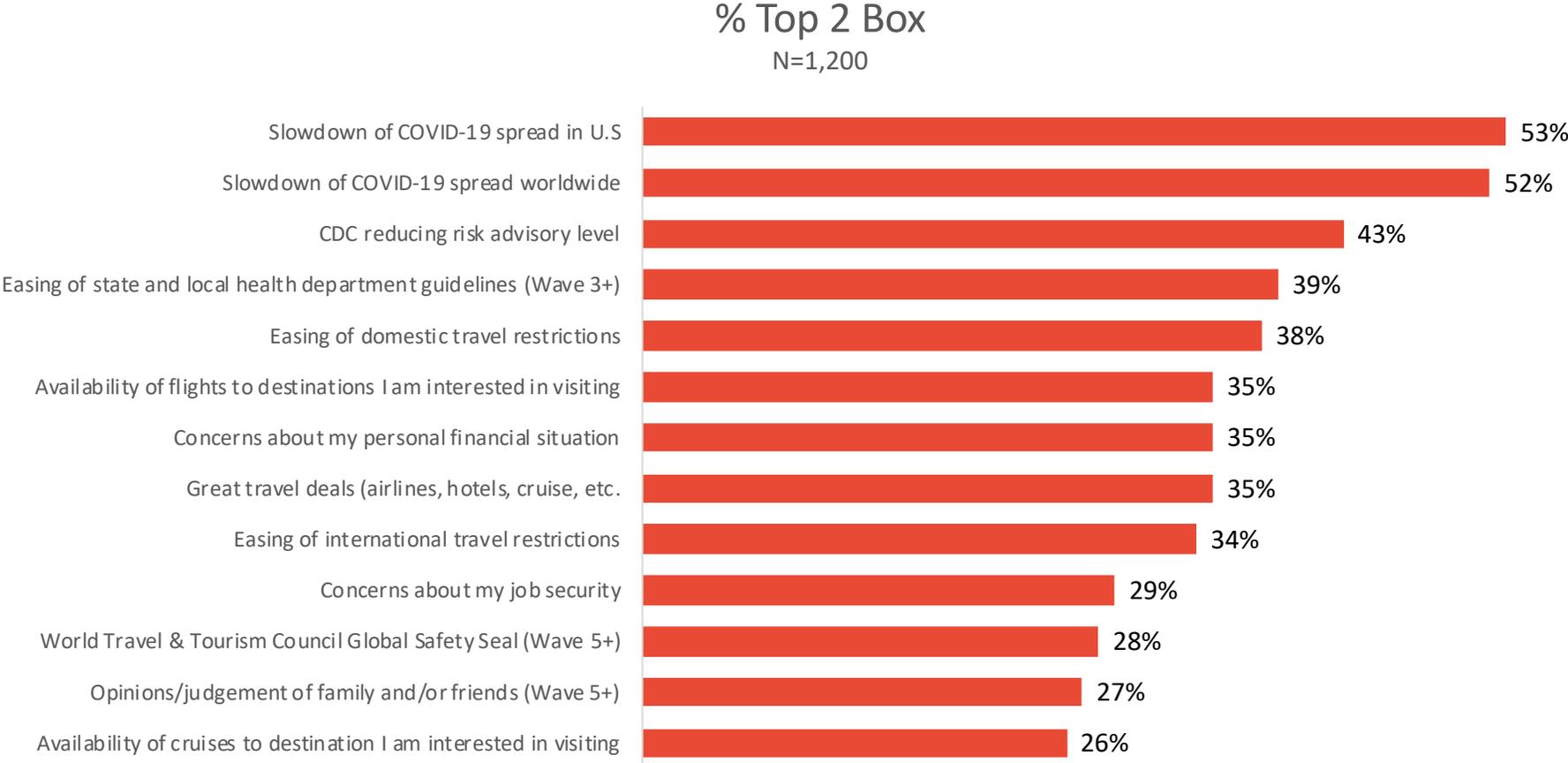
Question / Using a scale of 1 (not at all concerned) to 5 (extremely concerned), how concerned are you that you or other members of your household will contract coronavirus (COVID-19)?

And Slightly More Than Half Are Concerned About Members of Household Contracting COVID-19

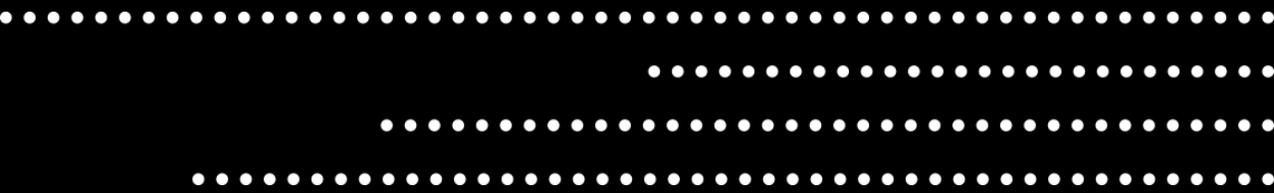


Question / Using a scale of 1 (not at all concerned) to 5 (extremely concerned), how concerned are you that you or other members of your household will contract coronavirus (COVID-19)?

The Slowing Spread of COVID-19 Will Have More Impact on Future Travel Decisions Than Great Travel Deals

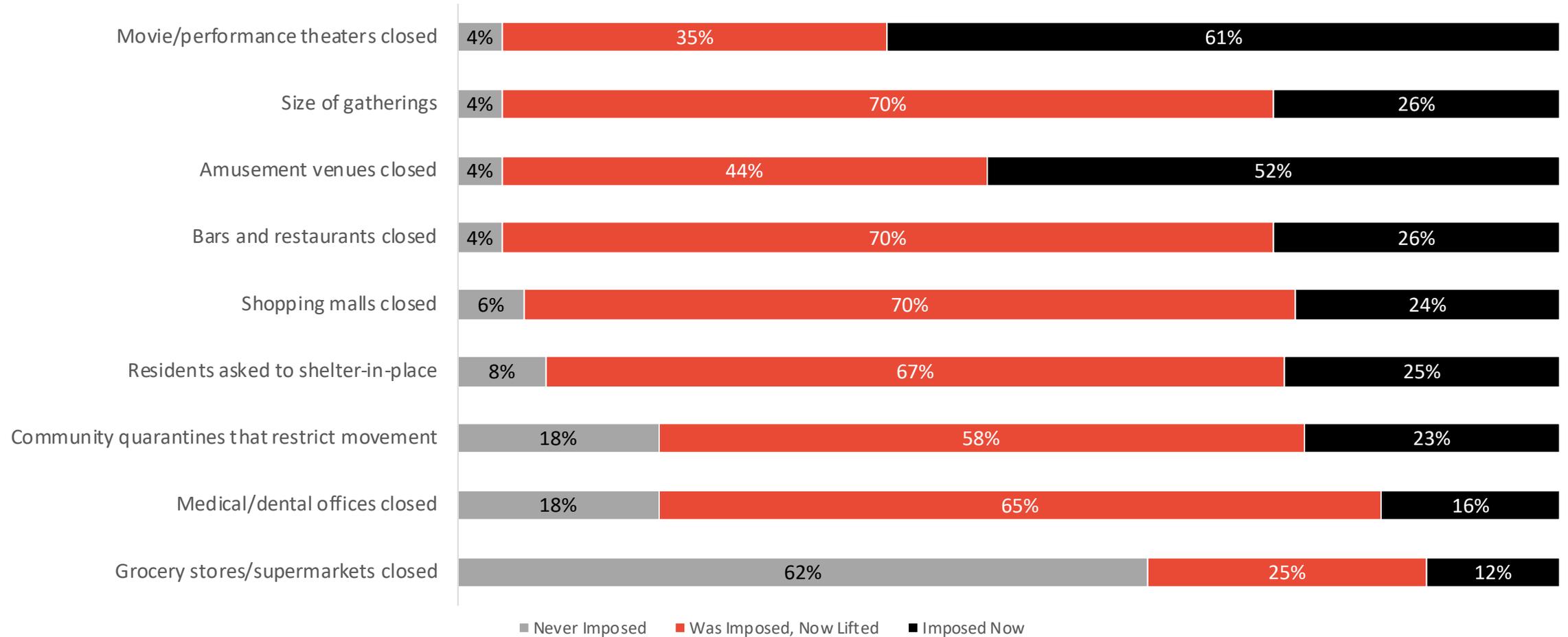


Question / Using a scale of 1 (no impact) to 5 (extreme impact), how will each of the following impact your decision to take a trip primarily for leisure purposes during the next 6 months?



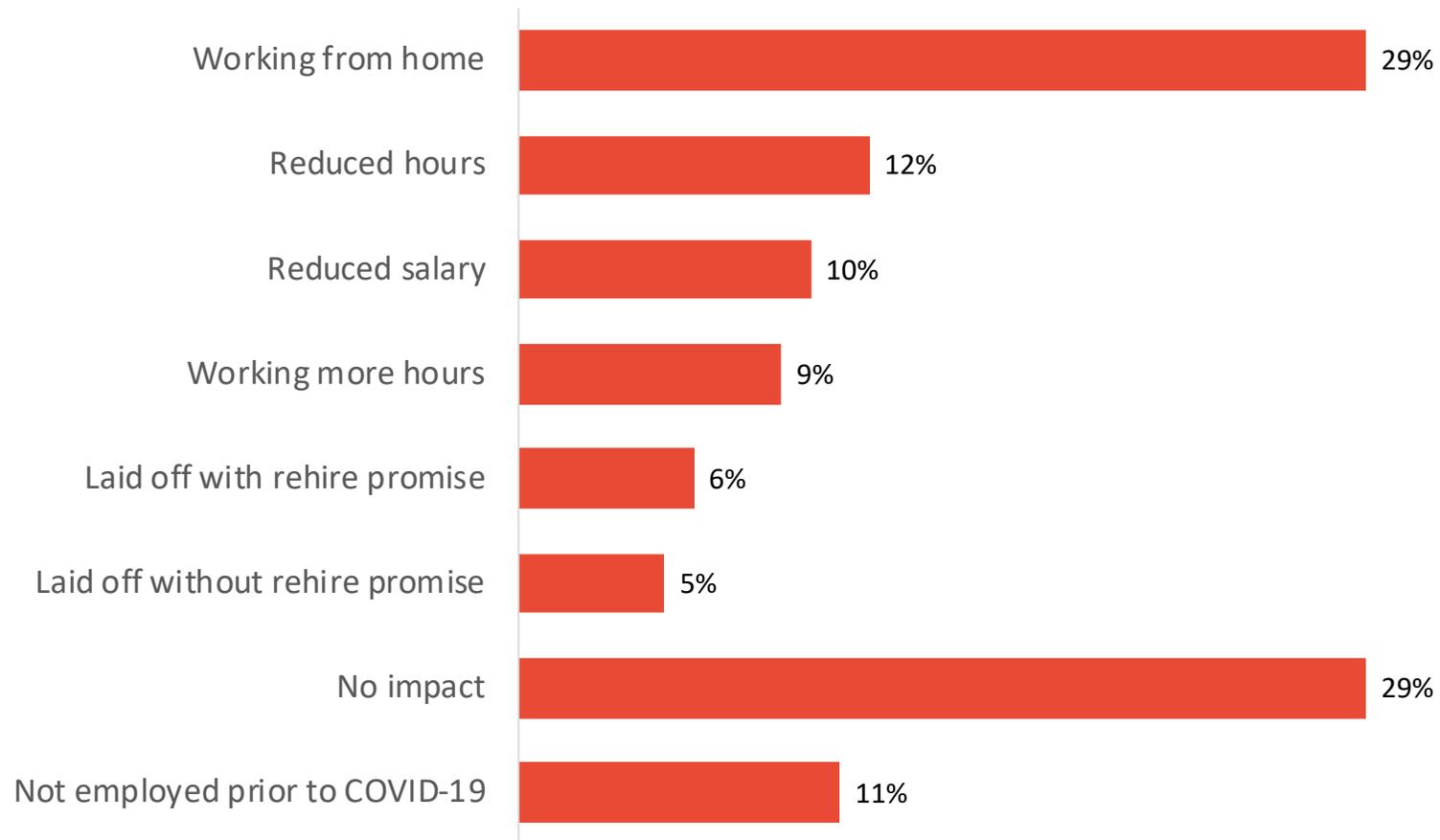
THE IMPACT OF COVID-19

Many Restrictions Have Been Lifted, Though Entertainment Establishments are Still Affected



Question / As of today, which of the following governmental restrictions have been imposed or lifted in your area as a result of the coronavirus (COVID-19) pandemic? (n=1,200)

Three in Five Travelers Have Experienced an Impact on Their Employment From COVID-19

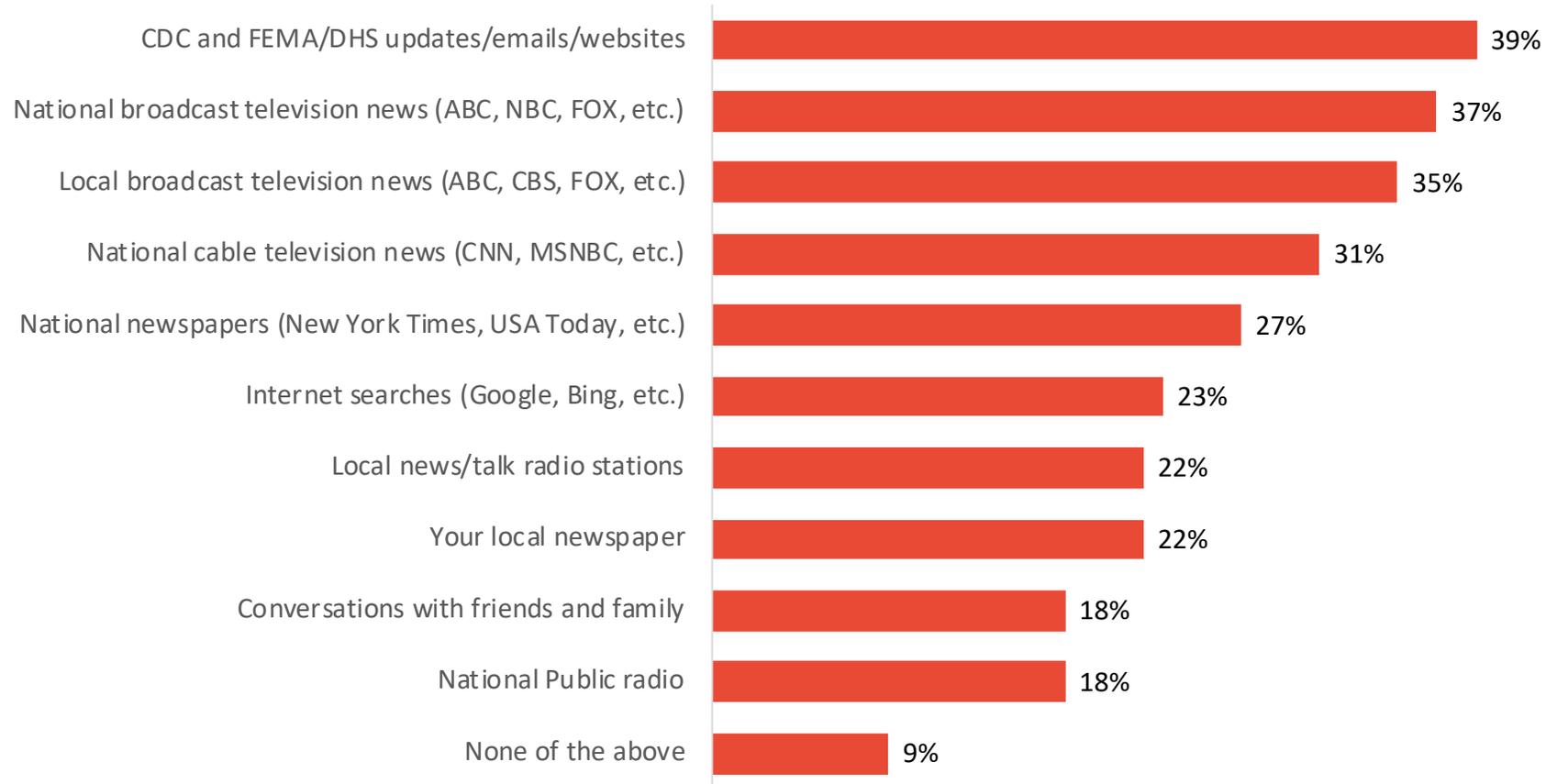


Question / How has your employment been impacted by the COVID-19 pandemic? (n=1,200)

SOURCES OF INFORMATION



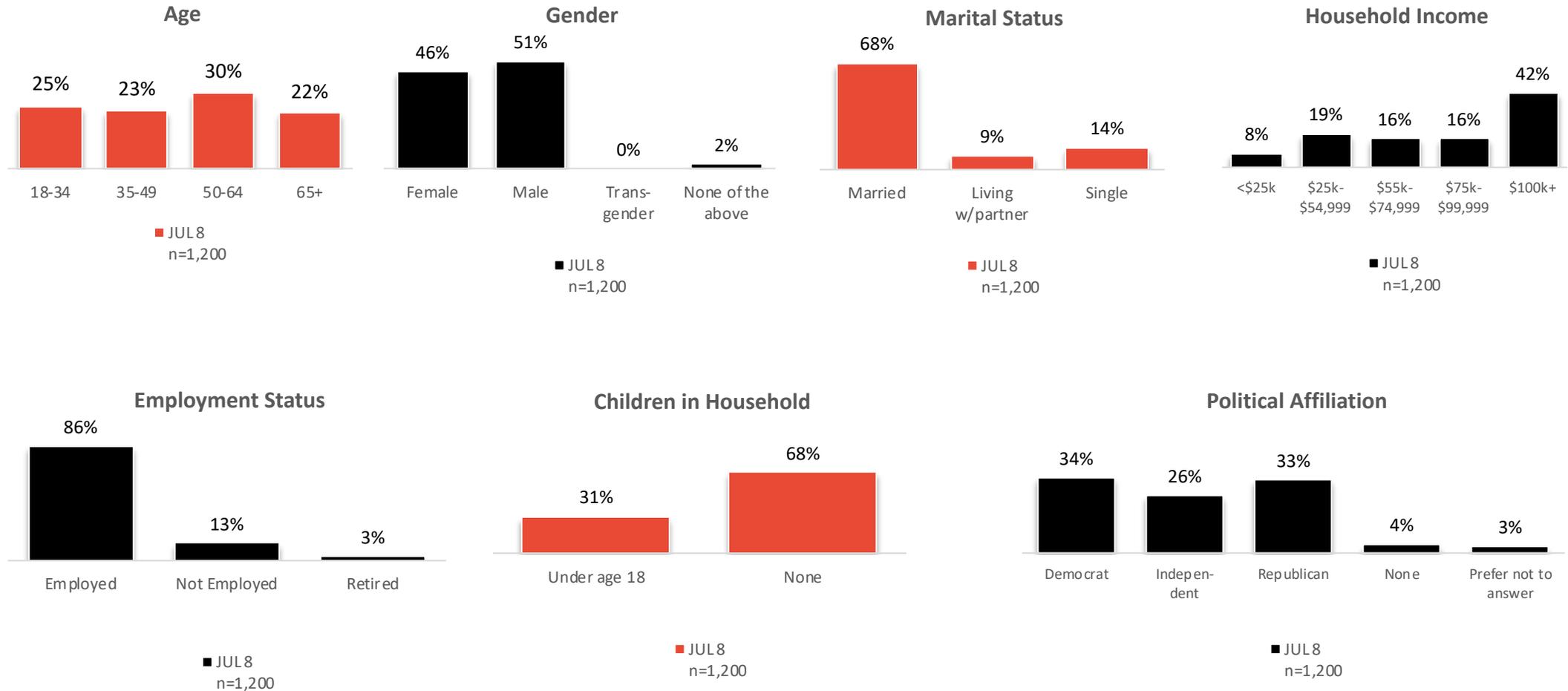
CDC Communications and Local TV News are Most Trusted Sources for News About COVID-19



Question / Which of the following sources of information do you trust for current status of, and news related to, COVID-19? (n=1,200)

DEMOGRAPHICS

Respondent Demographics





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