Travel Intentions Pulse Survey (TIPS): Impact of COVID-19
KEY FINDINGS – Wave III - April 17-22, 2020

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The U.S. Travel Association has engaged MMGY to conduct an ongoing survey to monitor the impact of COVID-19 on U.S. travelers. The online survey designed and analyzed by MMGY Travel Intelligence is conducted bi-weekly among 1,200 U.S. residents who have taken an overnight trip for either business or leisure in the past 12 months. The maximum error at the 95% level of confidence for a sample of 1,200 is +/- 2.83%.

Source: MMGY Travel Intelligence
KEY INSIGHTS

• Travelers are returning to a more optimistic outlook about travel in the next six months. After falling to just 31% of travelers in Wave II, those who said they are likely to take a vacation in the next six months increased to 38% in Wave III. The likelihood of taking a business trip in the next six months remained stable between Wave I and Wave II, which is also encouraging.

• As the pandemic continues, plans that were once postponed are increasingly being canceled. The most impacted are those that require longer-term planning and those that are more expensive such as vacations, flights, attending conferences and sporting and theatrical events. The largest shift has been in overall vacation plans, where those saying they’ve now canceled a vacation increased from 58% in Wave II to 66% Wave III.

• After dropping noticeably in Wave II, travelers’ perceptions of safety across various forms of transportation and travel increased in Wave III. This is likely due to the fact that mainstream media’s coverage of optimism about “flattening the curve” corresponded closely with when Wave III was in the field.

Source: MMGY Travel Intelligence

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• Road trips and travel to destinations closer to home will likely drive much of recovery demand as the pandemic fades. The percentage of travelers who agreed that they are more likely to travel by car after COVID-19 passes increased from 35% in Wave II to 47% in Wave III. And, the percentage who said they are more likely to travel to destinations close to home increased from 36% in Wave II to 42%. This was especially true for older travelers.

• Consumers’ interest in travel may ultimately be eclipsed by lingering concerns about either safety or their ability to pay for it. Six in ten respondents say they will be eager to travel for leisure once the COVID-19 emergency has passed, up from 54% in Wave II. Yet, just 38% say they are likely to take a leisure trip in the next six months.

• Less than one-third of travelers are eager to travel for business. However, business travelers are more likely to engage in all types of travel-related activities than are leisure travelers. This may simply reflect the fact that business travelers are typically more frequent travelers overall.

Source: MMGY Travel Intelligence
KEY INSIGHTS

- A slowing in the spread of COVID-19 worldwide and the CDC reducing risk advisory levels continue to be the most important factors impacting decisions to travel in the next six months. However, there are also signs that travelers are increasingly looking for travel restrictions to be lifted to make a travel decision. The percentage of travelers who indicated an easing of travel restrictions would impact their decision to travel increased from 45% in Wave II to 53% in Wave III.

- In Wave III, travelers were slightly less concerned about the threat of contracting COVID-19 than they were just two weeks prior. In particular, the concern about others in their household contracting the virus dropped from 40% in Wave II to 34% in Wave III. And, travelers age 50-64 years old continue to be the age group least concerned.

- The sources of information American travelers rely upon most for their COVID-19 news are national and local TV news, followed by national cable news and the CDC. Local radio talk shows and newspapers, as well as NPR, are the sources travelers rely upon the least.
90% of Travelers Surveyed Had Travel or Events Planned and Confirmed Prior to COVID-19

Travel Booked Prior to COVID-19

- Hotel/resort reservation: 39% (4/24), 40% (4/11)
- Domestic flight: 39% (4/24), 40% (4/11)
- Vacation: 35% (4/24), 40% (4/11)
- International flight: 22% (4/24), 23% (4/11)
- Rental car reservation: 19% (4/24), 18% (4/11)
- Conference/convention: 14% (4/24), 15% (4/11)
- Ocean cruise: 12% (4/24), 13% (4/11)
- Off-site business meeting: 11% (4/24), 12% (4/11)
- Vacation rental home: 11% (4/24), 12% (4/11)
- Group tour package: 7% (4/24), 7% (4/11)
- River cruise: 7% (4/24), 7% (4/11)

Events Booked Prior to COVID-19

- Bars/restaurants: 41% (4/24), 41% (4/11)
- Celebrations: 23% (4/24), 16% (4/11)
- Live sporting event: 18% (4/24), 18% (4/11)
- Live music concert: 18% (4/24), 18% (4/11)
- Live theatrical performance: 13% (4/24), 13% (4/11)
- Theme/amusement park: 13% (4/24), 12% (4/11)

Source: MMGY Travel Intelligence

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Plans That Were Once Postponed are Gradually Being Canceled

*Question added 4/11

Travel Booked Prior to COVID-19

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Canceled</th>
<th>Postponed</th>
<th>Continuing as Planned</th>
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</thead>
<tbody>
<tr>
<td>Hotel/resort reservation</td>
<td>64%</td>
<td>28%</td>
<td>8%</td>
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<tr>
<td>Domestic flight</td>
<td>64%</td>
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<tr>
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<tr>
<td>Live sporting event</td>
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<td>15%</td>
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<td>Celebrations (weddings, reunions,...)</td>
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<td>52%</td>
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Events Booked Prior to COVID-19

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<th>Event Type</th>
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<tr>
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Source: MMGY Travel Intelligence

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Travelers Starting to Feel Safer About Engaging in All Travel-Related Activities

Transportation and Lodging (% Top 2 Box on a 5-point Scale)

- Personal cars: 68% (65% 67%)
- Vacation rental homes/condos: 25% (25% 19%)
- Hotels/resorts: 20% (17% 13%)
- River cruise*: 11% (11% 11%)
- Domestic flights: 14% (11% 14%)
- Trains/railways: 13% (12% 9%)
- Cruises*: 12% (9% 9%)
- Ocean cruise*: 11% (9% 11%)
- International flights: 10% (9% 11%)

Activities and Venues (% Top 2 Box on a 5-point Scale)

- Parks: 40% (31% 27%)
- Grocery stores/supermarkets: 26% (19% 19%)
- Places of worship: 29% (17% 15%)
- Off-site business meetings: 16% (17% 17%)
- Indoor sporting events: 14% (14% 11%)
- Schools: 16% (13% 13%)
- Conferences/conventions: 14% (13% 11%)
- Outdoor sporting events: 18% (14% 14%)
- Outdoor concerts/festivals: 16% (13% 10%)
- Indoor concerts/festivals: 16% (13% 10%)
- Performance/movie theater: 13% (10% 10%)
- Bars/restaurants: 15% (12% 9%)
- Shopping malls: 14% (13% 9%)

*Added/Deleted 4/11

Source: MMGY Travel Intelligence

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Travelers Becoming More Eager to Travel – Particularly By Car and Closer to Home

After the Coronavirus (COVID-19) Has Passed, I Will ........

- Be eager to travel for leisure: 59% (52% in 4/11)
- Travel within U.S. rather than internationally**: 54% (52% in 4/11)
- Travel more often for vacation by car: 47% (35% in 4/11)
- Select destinations closer to home: 42% (36% in 4/11)
- Take more day trips: 40% (33% in 4/11)
- Travel for business by car**: 32% (33% in 4/11)
- Be eager to travel for business: 28% (26% in 4/11)

Source: MMGY Travel Intelligence

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Likelihood of Taking a Domestic Leisure Trip (Next Six Months) Has Increased, No Change In Business Travel Intentions

Take a Domestic Leisure Trip
(% Top 2 Box; 5-point Scale)

Take a Domestic Business Trip
(% Top 2 Box; 5-point Scale)

Source: MMGY Travel Intelligence

39% 31% 38%
3/27 n=1,200 4/11 n=1,200 4/24 n=1,200

26% 21% 21%
3/27 n=1,200 4/11 n=1,200 4/24 n=1,200

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Likehood of Engaging in Most Travel Activities (Next Six Months) Starting to Improve

% Top 2 Box

Transportation and Lodging
- Travel by personal car**: 67%
- Stay in a hotel/resort: 36% (4/11), 33% (4/24), 41% (3/27)
- Take a domestic flight: 32% (4/11), 31% (4/24), 39% (3/27)
- Stay in a vacation home/condo: 23% (4/11), 20% (4/24), 24% (3/27)
- Take an international flight: 19% (4/11), 18% (4/24), 21% (3/27)
- Travel by train/rail: 16% (4/11), 14% (4/24), 19% (3/27)
- Travel by bus: 13% (4/11), 11% (4/24), 14% (3/27)

Trip Type
- Take a domestic leisure trip: 67%
- Take domestic business trip: 38% (4/11), 31% (4/24), 39% (3/27)
- Take an international leisure trip: 21% (4/11), 16% (4/24), 22% (3/27)
- Take an international business trip: 14% (4/11), 13% (4/24), 15% (3/27)
- Take a group tour: 12% (4/11), 11% (4/24), 15% (3/27)
- River Cruise*: 12% (4/11), 13% (4/24), 13% (3/27)
- Ocean cruise*: 12% (4/11), 13% (4/24), 13% (3/27)

Events
- Visit a park (local, state, national, etc.): 17% (4/11), 16% (4/24), 20% (3/27)
- Attend an off-site business meeting: 19% (4/11), 15% (4/24), 20% (3/27)
- Attend a live theater performance: 15% (4/11), 11% (4/24), 15% (3/27)
- Attend a live sporting event: 18% (4/11), 12% (4/24), 22% (3/27)
- Attend a conference or convention: 17% (4/11), 19% (4/24), 19% (3/27)
- Visit a theme/amusement park: 15% (4/11), 15% (4/24), 20% (3/27)
- Visit a beach**: 48% (4/24), 37% (4/11), 37% (3/27)
- Visit a bar/restaurant: 44% (4/24), 40% (4/11), 49% (3/27)

*Added 4/11
** Added 4/24

Source: MMGY Travel Intelligence

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Business Travelers More Likely than Leisure Travelers to Engage in All Activities During Next Six Months

% Top 2 Box

4/24 Overnight Business Travel in Past 12 Mo. (n=687)

4/24 Overnight Leisure Travel in Past 12 Mo. (n=1,170)

Transportation & Lodging
- Travel by personal car*
- Stay in a hotel/resort
- Take a domestic flight
- Travel by train
- Travel by bus
- Take an international flight

Trip Type
- Take a domestic leisure trip
- Take an international business trip
- Ocean Cruise*
- Take a group tour
- River Cruise*

Events
- Attend an off-site business meeting
- Attend a live concert
- Attend a conference or convention
- Visit a theme/amusement park
- Visit a beach**
- Visit a bar/restaurant
- Attend an in-site business meeting

Source: MMGY Travel Intelligence

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Younger Travelers Expected to Travel Most During Next Six Months, Older Travelers More Likely to Do So by Car

Source: MMGY Travel Intelligence

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Travelers From All Regions Similar In Their Likelihood to Engage in Travel Activities During Next Six Months

% Top 2 Box

Transportation & Lodging

<table>
<thead>
<tr>
<th>Activity</th>
<th>Northeast (n=286)</th>
<th>Midwest (n=233)</th>
<th>South (n=406)</th>
<th>West (n=274)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel by personal car*</td>
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<tr>
<td>Stay in a hotel/resort</td>
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<tr>
<td>Take a domestic flight</td>
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<tr>
<td>Stay in vacation rental home</td>
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<td>Travel by train/rail</td>
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<td>Travel by bus</td>
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<td>Take international flight</td>
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<td>Take a domestic leisure trip</td>
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<td>Ocean Cruise*</td>
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Trip Type

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<th>Midwest (n=233)</th>
<th>South (n=406)</th>
<th>West (n=274)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take a group tour</td>
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<tr>
<td>Visit a local, state, national, etc.*</td>
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<tr>
<td>Visit a beach*</td>
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<tr>
<td>Attend a live sporting event</td>
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<tr>
<td>Attend a live theater performance</td>
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<td>Attend an off-site business meeting</td>
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<td>Attend a conference or convention</td>
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<td>Visit a theme/amusement park</td>
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Events

<table>
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<tbody>
<tr>
<td>Attend a live concert</td>
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<tr>
<td>Visit a bar/restaurant</td>
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</tbody>
</table>

Source: MMGY Travel Intelligence

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*Added 4/11
**Added 4/24
Slowing The Spread of COVID-19 Most Likely To Impact Future Travel Plans, Easing of Travel Restrictions Increasingly Important

% Top 2 Box among all travelers

Impact on Taking a Leisure Trip

- Slowdown of COVID-19 worldwide
- Slowdown of COVID-19 spread in U.S.
- CDC reducing risk advisory level
- Easing of state/local health department guidelines *
- Easing of domestic travel restrictions
- Great travel deals
- Concerns for personal financial situation
- Availability of flights to destinations interested in visiting
- Easing of international travel restrictions
- Concerns for my job security
- Availability of cruises to destinations interested in...

Impact on Taking a Business Trip

- Slowdown of COVID-19 spread in U.S.
- Slowdown of COVID-19 worldwide
- Easing of state/local health department guidelines *
- CDC reducing risk advisory level
- Easing of domestic travel restrictions
- Availability of flights to destinations interested in visiting
- Great travel deals
- Concerns for personal financial situation
- Concerns for my job security
- Easing of international travel restrictions
- Availability of cruises to destinations interested in...

Source: MMGY Travel Intelligence

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Closures of Most Public Venues Continue to Increase

- Schools closed
- Movie/performance theaters closed
- Size of gatherings
- Amusement venues closed
- Bars and restaurants closed
- Shopping malls closed
- Residents asked to shelter-in-place
- Community quarantines that restrict movement
- Medical/dental offices closed
- Grocery stores/supermarkets closed
- No restrictions in my area

Source: MMGY Travel Intelligence
Personal Concern for Contracting COVID-19 Remains the Same, Extreme Concern for Others in the Household Declines

For Myself

1 Not at all Concerned | 2 | 3 | 4 | 5 Extremely Concerned
---|---|---|---|---
1 Not at all Concerned | 8% | 5% | 6% | 27% | 23% | 23% | 32% | 34% | 33%
2 | 13% | 15% | 27% | 23% | 25% | 24% |
3 | 10% | 13% | 27% | 23% | 25% | 24% |
4 | 8% | 10% | 27% | 23% | 25% | 24% |
5 Extremely Concerned | 5% | 6% | 13% | 27% | 23% | 23% | 32% | 34% | 33%

For Others in My Household

1 Not at all Concerned | 6% | 4% | 5% | 7% | 9% | 11% | 20% | 18% | 9%
2 | 9% | 11% | 20% | 18% | 9% |
3 | 7% | 11% | 20% | 18% | 9% |
4 | 6% | 10% | 20% | 18% | 9% |
5 Extremely Concerned | 3% | 4% | 5% | 7% | 9% | 11% | 20% | 18% | 9%

Source: MMGY Travel Intelligence

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Concern About Contracting COVID-19 Starting to Decline Among Most Age Cohorts

Source: MMGY Travel Intelligence

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Concern About Contracting COVID-19 Declined Across All Regions, But Northeast and South Still Most Concerned

For Myself by Region (% Top 2 Box)

<table>
<thead>
<tr>
<th>Region</th>
<th>3/27</th>
<th>4/11</th>
<th>4/24</th>
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<tbody>
<tr>
<td>Total</td>
<td>55%</td>
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<td>Northeast</td>
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<td>59%</td>
<td>57%</td>
</tr>
<tr>
<td>West</td>
<td>62%</td>
<td>54%</td>
<td>49%</td>
</tr>
</tbody>
</table>

For Others in My Household by Region (% Top 2 Box)

<table>
<thead>
<tr>
<th>Region</th>
<th>3/27</th>
<th>4/11</th>
<th>4/24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>65%</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>Northeast</td>
<td>68%</td>
<td>68%</td>
<td>68%</td>
</tr>
<tr>
<td>Midwest</td>
<td>64%</td>
<td>65%</td>
<td>63%</td>
</tr>
<tr>
<td>South</td>
<td>73%</td>
<td>68%</td>
<td>63%</td>
</tr>
<tr>
<td>West</td>
<td>68%</td>
<td>65%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Source: MMGY Travel Intelligence

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Most Respondents Rely On National/Local Broadcast Network TV News For Information About COVID-19

Source: MMGY Travel Intelligence

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