NOVEMBER 2020 – Wave X

TRAVEL INTENTIONS PULSE SURVEY (TIPS)

Impact of COVID-19

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OVERVIEW

MMGY 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 travelers’ prevailing attitudes and expected changes in their travel behavior as a result of COVID-19.
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. Active travelers who have taken at least one overnight trip for either business or leisure during the past 12 months.

• Data for this wave were collected between October 19–28, 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

MMGY Global’s November Wave X report reveals a setback in travel expectations during the next six months as COVID-19 cases experience a resurgence in many parts of the U.S. With summer in the rearview mirror, schools (both virtual and in-person) back in session and colder weather setting in, travel intentions declined this month versus last.

• After increasing each of the previous two months, the percentage of respondents intending to travel for leisure during the next six months fell from 46% in Wave IX to 40% this month. It is noteworthy that the percentage of respondents stating they are “Not at all likely to travel for leisure in the next six months” spiked from 15% in Wave IX to 21% this month.

• Conversely, business travel expectations remained fairly constant, increasing from 33% in Wave IX to 34% this month.

• Intent to travel by personal car during the next six months declined from 70% in Wave IX to 64% this month, while intent to take a domestic flight fell from 38% in Wave IX to 32% this month. These data suggest that demand for travel services during the upcoming holiday season may be more modest than originally expected.
Key Findings

• Travel intentions remain highest for road trips: 1 in 5 travelers (20%) is willing to drive more than 500 miles (each way) for a leisure trip.

• The combination of rising COVID-19 cases and the arrival of colder weather likely impacted the percentage of travelers stating their intention to take part in various indoor and outdoor activities this month. Intent to visit a state/national park or a beach had been rising, yet both declined in this most recent wave.

• The likelihood of taking an ocean cruise during the next six months rose this month despite declining intentions to engage in most other forms of travel. The CDC’s decision to lift the “No Sail” order from U.S. ports effective November 1 presumably contributed to this improved sentiment (although both Carnival and Royal Caribbean subsequently decided to postpone any departures from U.S. ports through the end of December).

• On a concerning note, almost half of respondents stated they would not get a vaccine for COVID-19 when one becomes available. An equal percentage stated they would wait a few months to assess its efficacy. The delayed adoption of an effective vaccine by active travelers would presumably extend the depressed demand period through which the industry is now maneuvering.
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)

- A domestic flight: 35%
- A reservation at a hotel or resort: 31%
- A previously confirmed/booked vacation: 24%
- Going to bars or restaurants: 23%
- Celebrations (weddings, reunions, showers, etc.): 23%
- An international flight: 22%
- Attendance at a live music concert: 14%
- Attendance at a live sporting event: 14%
- An ocean cruise: 14%
- Attendance at a conference or convention: 13%
- Attendance at an off-site business meeting: 13%
- A rental car reservation: 13%
- Attendance at a live theatrical performance: 13%
- A reservation at a vacation home/condominium: 13%
- A visit to a theme or amusement park: 10%
- An all-inclusive group tour package: 9%
- A river cruise: 7%
Respondents Continued To Cancel Rather Than Postpone Most Forms Of Travel

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Canceled Plans</th>
<th>Postponed Plans</th>
<th>Continuing as Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>River cruise</td>
<td>42%</td>
<td>40%</td>
<td>18%</td>
</tr>
<tr>
<td>Group tour package</td>
<td>45%</td>
<td>38%</td>
<td>17%</td>
</tr>
<tr>
<td>Ocean cruise</td>
<td>44%</td>
<td>44%</td>
<td>12%</td>
</tr>
<tr>
<td>Vacation</td>
<td>62%</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Off-site business meeting</td>
<td>50%</td>
<td>34%</td>
<td>15%</td>
</tr>
<tr>
<td>Conference/convention</td>
<td>50%</td>
<td>32%</td>
<td>17%</td>
</tr>
</tbody>
</table>

(among those with plans – Wave X)

*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?
Respondents Continued To Cancel Rather Than Postpone Flight, Car Rental And Lodging Reservations

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Canceled Plans</th>
<th>Postponed Plans</th>
<th>Continuing as Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic flight</td>
<td>56%</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>International flight</td>
<td>57%</td>
<td>35%</td>
<td>8%</td>
</tr>
<tr>
<td>Rental car reservation</td>
<td>54%</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Hotel/resort reservation</td>
<td>54%</td>
<td>30%</td>
<td>17%</td>
</tr>
<tr>
<td>Vacation rental home</td>
<td>42%</td>
<td>34%</td>
<td>25%</td>
</tr>
</tbody>
</table>

*n=242\n*n=309\n*n=439\n*n=201

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)
Respondents Continued To Cancel Rather Than Postpone Attendance At Live Events And Visiting Theme Parks, While Intentions Toward Visiting Bars/Restaurants And Attending Celebrations Improved

Events
(among those with plans – Wave X)

<table>
<thead>
<tr>
<th>Event</th>
<th>Canceled Plans</th>
<th>Postponed Plans</th>
<th>Continuing as Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live music/concert (n=251)</td>
<td>55%</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>Live theatrical performance (n=203)</td>
<td>51%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Live sporting event (n=217)</td>
<td>50%</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Bars/restaurants (n=443)</td>
<td>37%</td>
<td>42%</td>
<td>21%</td>
</tr>
<tr>
<td>Theme/amusement park (n=177)</td>
<td>43%</td>
<td>40%</td>
<td>17%</td>
</tr>
<tr>
<td>Celebrations (weddings, reunions, etc.) (n=249)</td>
<td>40%</td>
<td>43%</td>
<td>17%</td>
</tr>
</tbody>
</table>

*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
Likelihood Of Taking A Domestic Leisure Trip Declined As The Number Of New COVID-19 Cases Continued To Rise (Next Six Months)

% Top 2 Box
(among those who took a leisure trip or 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? (Leisure: n=1,164, Business: n=737)
There Was A Significant Increase In % of Respondents Not At All Likely To Take A Domestic Leisure Trip (Next Six Months)

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?

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Business Intentions In The Next Six Months Remained Similar to Last Month

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?

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There Was A Decline In The Percentage Of Both Leisure And Business Travelers Who Expect To Take A Trip During Next Six Months

**When Expect to Take Next Leisure Trip**
(Among those who took a leisure trip in past 12 months)

<table>
<thead>
<tr>
<th></th>
<th>OCT 28 n=1,164</th>
<th>SEPT 29 n=1,136</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within next 30 days</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Within next 3 months</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Within next 6 months</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>More than 12 months from now</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>No leisure travel expectation</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Total = 62% (Wave 10) = 67% (Wave 9)

**Question** / When do you expect to take your next leisure trip?

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**When Expect to Take Next Business Trip**
(Among those who took a business trip in past 12 months)

<table>
<thead>
<tr>
<th></th>
<th>OCT 28 n=737</th>
<th>SEPT 29 n=1,136</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within next 30 days</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Within next 3 months</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Within next 6 months</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>More than 12 months from now</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>No business travel expectation</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Total = 53% (Wave 10) = 56% (Wave 9)

**Question** / When do you expect to take your next business trip?

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TRAVEL INTENTIONS
BY CATEGORY
Percentage Of Respondents Likely To Take A Domestic Leisure Or Business Trip Declined; Expectations For International Travel Didn’t Change (Next Six Months)

### Business and Leisure Trip Type

<table>
<thead>
<tr>
<th>Date</th>
<th>Take domestic leisure trip</th>
<th>Take domestic business trip</th>
<th>Take international leisure trip</th>
<th>Take international business trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR 27</td>
<td>39%</td>
<td>31%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>APR 11</td>
<td>39%</td>
<td>36%</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>APR 24</td>
<td>39%</td>
<td>38%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>MAY 8</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>JUN 9</td>
<td>39%</td>
<td>39%</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>JUL 8</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>JUL 31</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>AUG 31</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>SEP 29</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>OCT 28</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>40%</td>
</tr>
</tbody>
</table>

**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 Traveling By Personal Car Declined To The Lowest Level Observed To Date (Next Six Months)

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?

### Transportation % Top 2 Box

<table>
<thead>
<tr>
<th>Date</th>
<th>Travel by personal car*</th>
<th>Take a domestic flight</th>
<th>Take an international flight</th>
<th>Travel by bus</th>
<th>Travel by train/rail</th>
<th>Travel by mass transit**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 27</td>
<td>67%</td>
<td>39%</td>
<td>19%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Apr 11</td>
<td>68%</td>
<td>31%</td>
<td>18%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Apr 24</td>
<td>67%</td>
<td>32%</td>
<td>16%</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>May 8</td>
<td>67%</td>
<td>32%</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Jun 9</td>
<td>73%</td>
<td>32%</td>
<td>21%</td>
<td>18%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Jul 8</td>
<td>75%</td>
<td>31%</td>
<td>20%</td>
<td>16%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Jul 31</td>
<td>70%</td>
<td>32%</td>
<td>18%</td>
<td>16%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Aug 31</td>
<td>64%</td>
<td>35%</td>
<td>22%</td>
<td>17%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Sep 29</td>
<td>38%</td>
<td>32%</td>
<td>21%</td>
<td>19%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Oct 28</td>
<td>32%</td>
<td>32%</td>
<td>19%</td>
<td>16%</td>
<td>16%</td>
<td>15%</td>
</tr>
</tbody>
</table>

*Added 4/24
**Added 7/8

Question: © MMGY Global 2020
One in Five Travelers Is Willing To Drive More Than 500 Miles (Each Way) For A Leisure Trip (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 A Hotel/Resort Remained Unchanged, While Likelihood Of Staying In A Vacation Home/Condo Declined (Next Six 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 Engaging In Outdoor Activities Declined As Colder Weather Approaches (Next Six Months)

Outdoor Events
% Top 2 Box

- Visit a park (local, state, national, etc.)*
- Visit a beach*
- Visit a theme/amusement park
- Participate in snow sports (skiing, snowboarding, etc.)**

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?

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Likelihood Of Visiting A Bar/Restaurant Declined, While Likelihood Of Engaging In Other Forms Of Entertainment Didn’t Change (Next Six Months)

**Entertainment**

% Top 2 Box

- **Visit a bar/restaurant**: 49%, 40%, 44%, 38%, 44%, 38%, 41%, 42%, 37%
- **Attend an outdoor concert/festival***: 20%, 16%, 19%, 16%, 19%, 14%, 18%, 18%, 19%
- **Attend an outdoor sporting event***: 22%, 21%, 20%, 20%, 21%, 25%, 20%, 20%, 21%
- **Attend a live theater performance**: 20%, 16%, 19%, 16%, 19%, 14%, 18%, 18%, 19%
- **Attend an indoor concert/festival***: 20%, 16%, 19%, 16%, 19%, 14%, 18%, 18%, 19%
- **Attend an indoor sporting event***: 20%, 16%, 19%, 16%, 19%, 14%, 18%, 18%, 19%

***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 Of Taking An Ocean Cruise Increased, While Likelihood Of Taking A Group Tour Declined (Next Six Months)

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 An Off-Site Business Meeting, Conference Or Convention Declined (Next Six Months)

Business Events
% Top 2 Box

- Attend an off-site business meeting
- Attend a conference or convention

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?

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COVID-19 CONCERNS AMONG TRAVELERS
Percentage Of Respondents “Extremely” Concerned About Contracting COVID-19 Increased In October

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)?

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Percentage Of Respondents “Extremely” Concerned About Household Members Contracting COVID-19 Also Increased

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)?

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Concerns About COVID-19 Continue To Dominate Factors Impacting Travel Decisions Approaching The Holidays

% Top 2 Box
n=1,200

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?
Less Than Half Of Respondents Would Get A COVID-19 Vaccine When One Becomes Available; A Similar Percentage Would Wait A Few Months

Question / Which of the following best describes your plan for if/when a vaccine becomes available?

- I would get the vaccine as soon as it is available to me (46%)
- I would wait at least a few months to see if it is effective (45%)
- I would not get the vaccine (9%)
THE IMPACT OF COVID-19
While Restrictions Have Been Reduced In Many States, Numerous Travel Economy Businesses Remain Closed

<table>
<thead>
<tr>
<th>Category</th>
<th>Never Imposed</th>
<th>Was Imposed, Now Lifted</th>
<th>Imposed Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movie/performance theaters closed</td>
<td>6%</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>Size of gatherings</td>
<td>4%</td>
<td>40%</td>
<td>56%</td>
</tr>
<tr>
<td>Amusement venues closed</td>
<td>6%</td>
<td>53%</td>
<td>42%</td>
</tr>
<tr>
<td>Bars and restaurants closed</td>
<td>7%</td>
<td>75%</td>
<td>18%</td>
</tr>
<tr>
<td>Shopping malls closed</td>
<td>10%</td>
<td>73%</td>
<td>17%</td>
</tr>
<tr>
<td>Residents asked to shelter-in-place</td>
<td>11%</td>
<td>68%</td>
<td>20%</td>
</tr>
<tr>
<td>Community quarantines that restrict movement</td>
<td>20%</td>
<td>57%</td>
<td>23%</td>
</tr>
<tr>
<td>Medical/dental offices closed</td>
<td>24%</td>
<td>60%</td>
<td>15%</td>
</tr>
<tr>
<td>Grocery stores/supermarkets closed</td>
<td>53%</td>
<td>32%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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)
COVID-19 Has Had A Significant Impact On The Work Habits Or Employment Status Of The Majority Of Respondents

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

- Working from home: 22%
- Reduced hours: 11%
- Reduced salary: 10%
- Working more hours: 9%
- Laid off with rehire promise: 7%
- Laid off without rehire promise: 6%
- No impact: 29%
- Not employed prior to COVID-19: 14%

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SOURCES OF INFORMATION
National Broadcast and Cable TV News Are Most Trusted Sources For News About COVID-19

- National broadcast television news (ABC, NBC, FOX, etc.): 36%
- National cable television news (CNN, MSNBC, etc.): 35%
- CDC and FEMA/DHS updates/emails/websites: 34%
- Local broadcast television news (ABC, CBS, FOX, etc.): 33%
- National newspapers (The New York Times, USA Today, etc.): 28%
- Your local newspaper: 23%
- Internet searches (Google, Bing, etc.): 22%
- National Public Radio: 18%
- Conversations with friends and family: 18%
- Local news/talk radio stations: 18%
- None of the above: 9%

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
Chris Davidson
EVP, Insights & Strategy
CDavidson@MMGYIntel.com

Cheryl Schutz
VP, Travel Intelligence
CSchutz@MMGYIntel.com