



U.S. TRAVEL

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Travel Intentions Pulse Survey (TIPS): Impact of COVID-19

KEY FINDINGS – March 27, 2020

Research and analysis conducted by:

TIPS: IMPACT OF COVID-19

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%.

KEY INSIGHTS

- The likelihood of taking a leisure trip in the next 6 months has declined by more than 50% in past month
- Travelers feel safest now in personal vehicles and least safe on cruises and international flights
- Business travelers generally feel safer traveling than leisure travelers

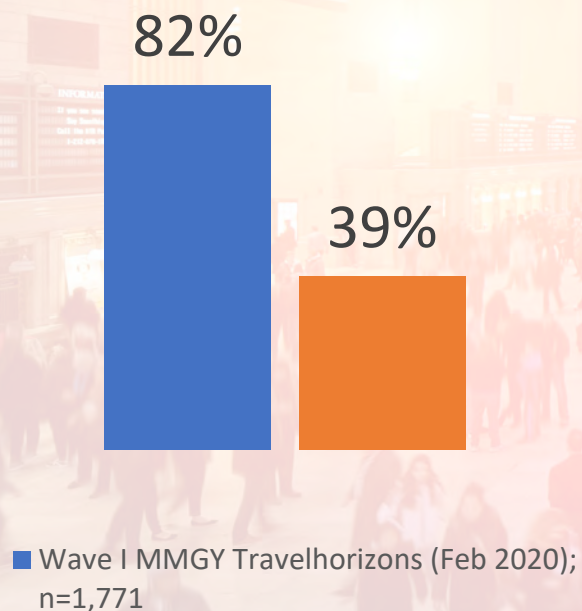
- **Slowdown in spread of COVID-19 will have the most impact on travel decisions in next 6 months**
- **Travelers are just as concerned about family members contracting COVID-19 as they are about getting it themselves**
- **Younger travelers are more likely to worry more about others, but they are also concerned about their own health**

KEY INSIGHTS

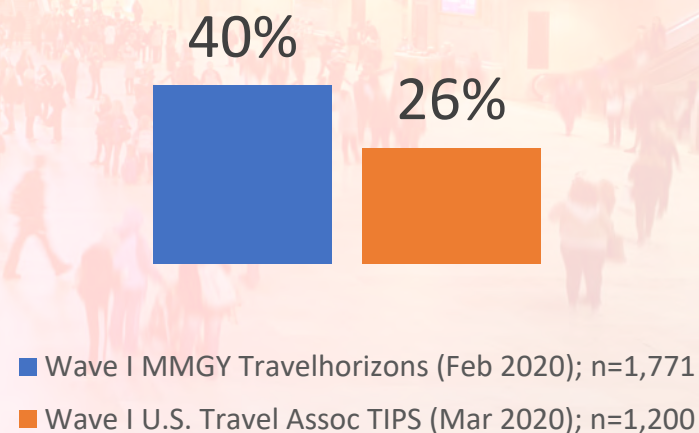
The Likelihood of Taking a Domestic Business Trip in the Next 6 Months Has Declined Materially In Past Month*

% of travelers who say they are likely to travel domestically for leisure in next 6 months

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



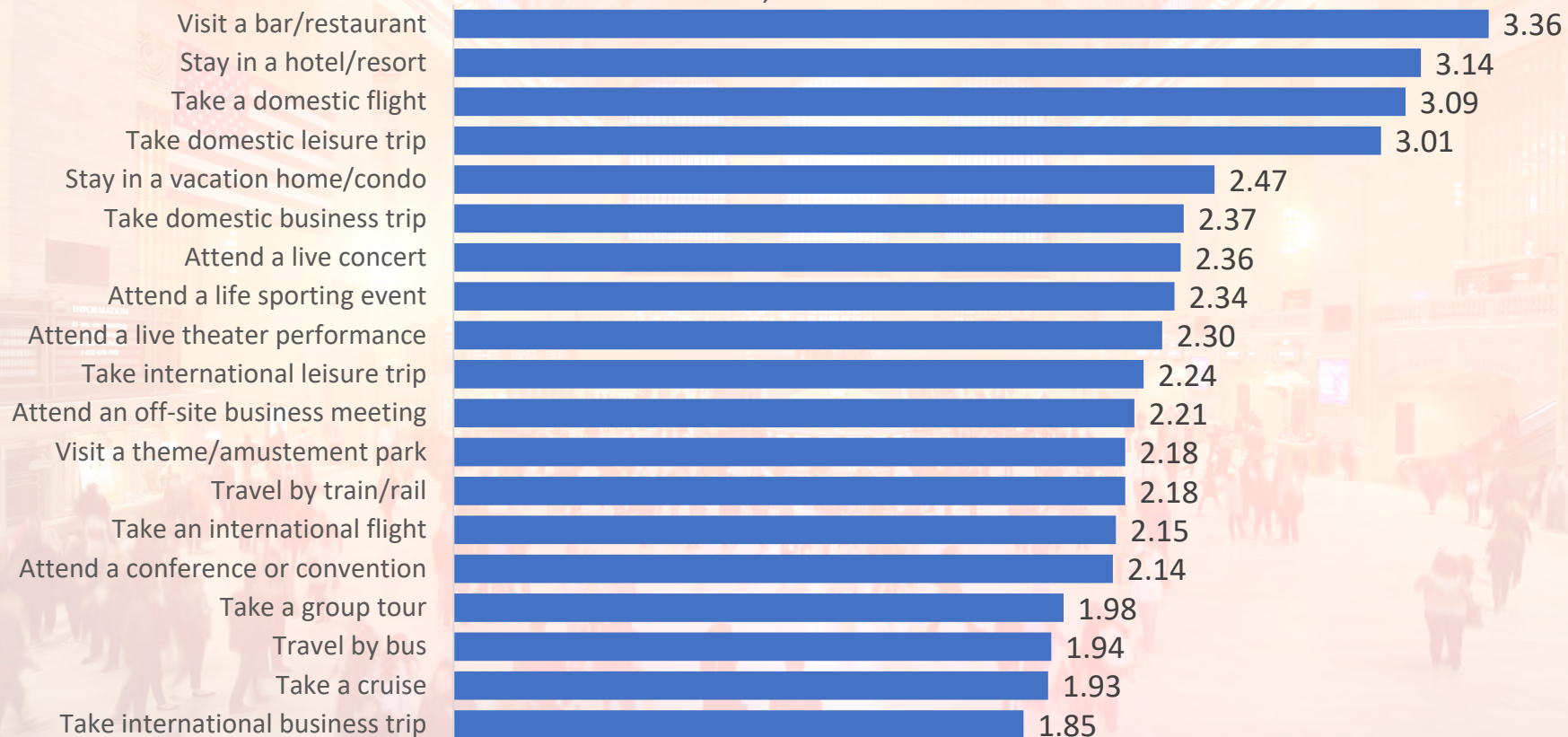
Take a Domestic Business Trip
(% Top 2 Box; 5-point Scale)



Likelihood of Doing Each of the Following Activities in the Next 6 Months

Mean Score; 5-point Scale

N=1,200

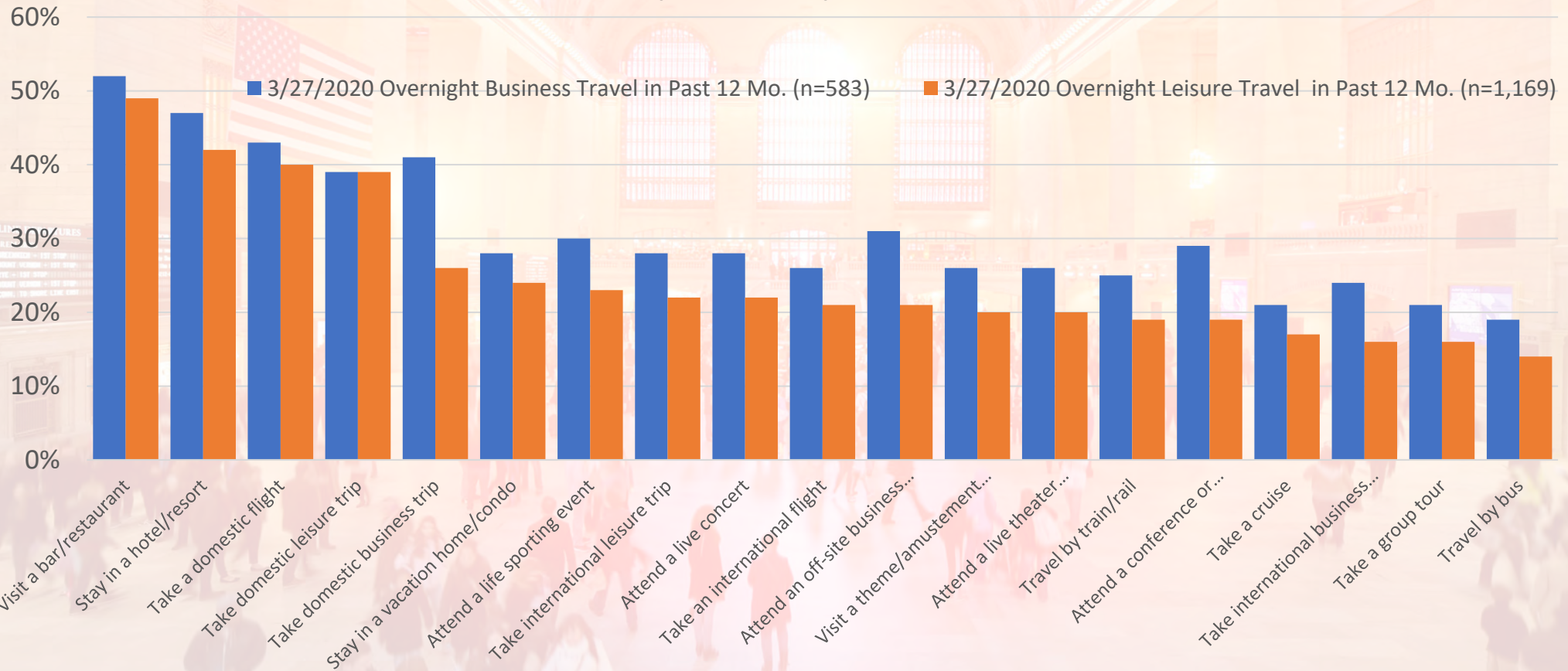


■ 3/27/2020 (benchmark survey)

Business Travelers More Likely than Leisure Travelers to Engage in All Activities

% of travelers who say they are likely to do each of the following activities in the next 6 months

% Top 2 Box; 5-point Scale

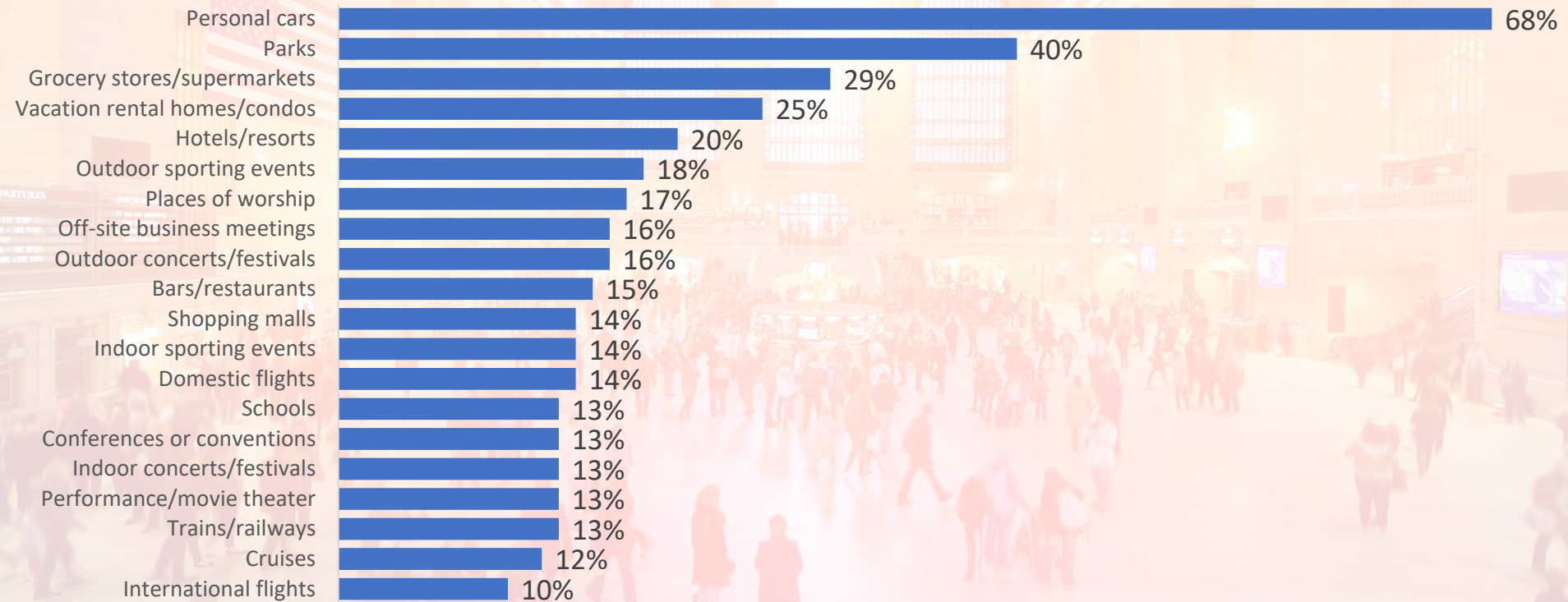


Perceived Safety of....

% of travelers who say they feel safe in each of the listed locations or activities

% Top 2 Box; 5-point Scale

N=1,200

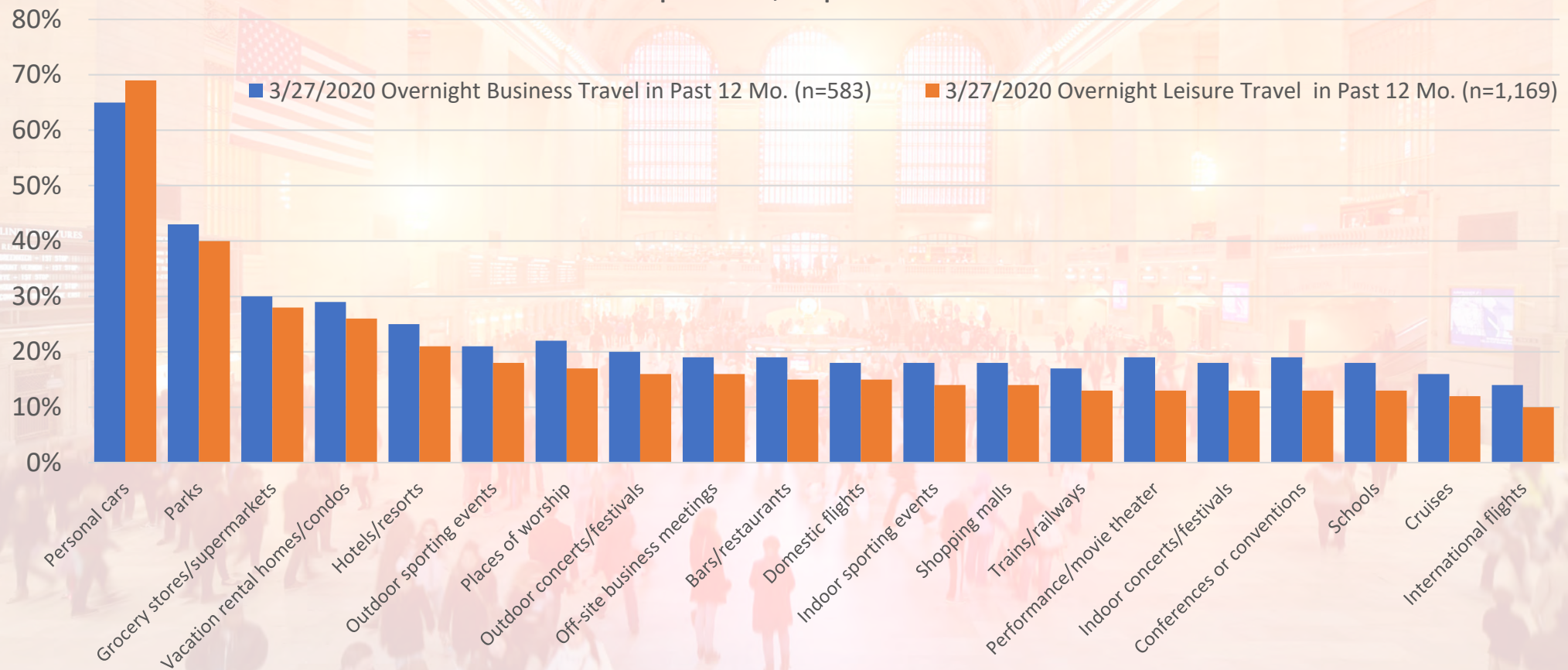


■ 3/27/2020 (benchmark survey)

Business Travelers Generally Feel Safer Traveling Than Leisure Travelers

% of travelers who say they feel safe in each of the listed locations or activities

% Top 2 Box; 5-point Scale



Slowdown in Spread of COVID-19 will have the Most Impact on Travel Decisions During Next 6 Months

% of travelers who cite each factor as having an impact on their decision to travel in the upcoming 6 months

Impact on Taking a Leisure Trip

(% Top 2 Box among those who took leisure trip in past 12 months; n=1,111)



■ 3/27/2020

Impact on Taking a Business Trip

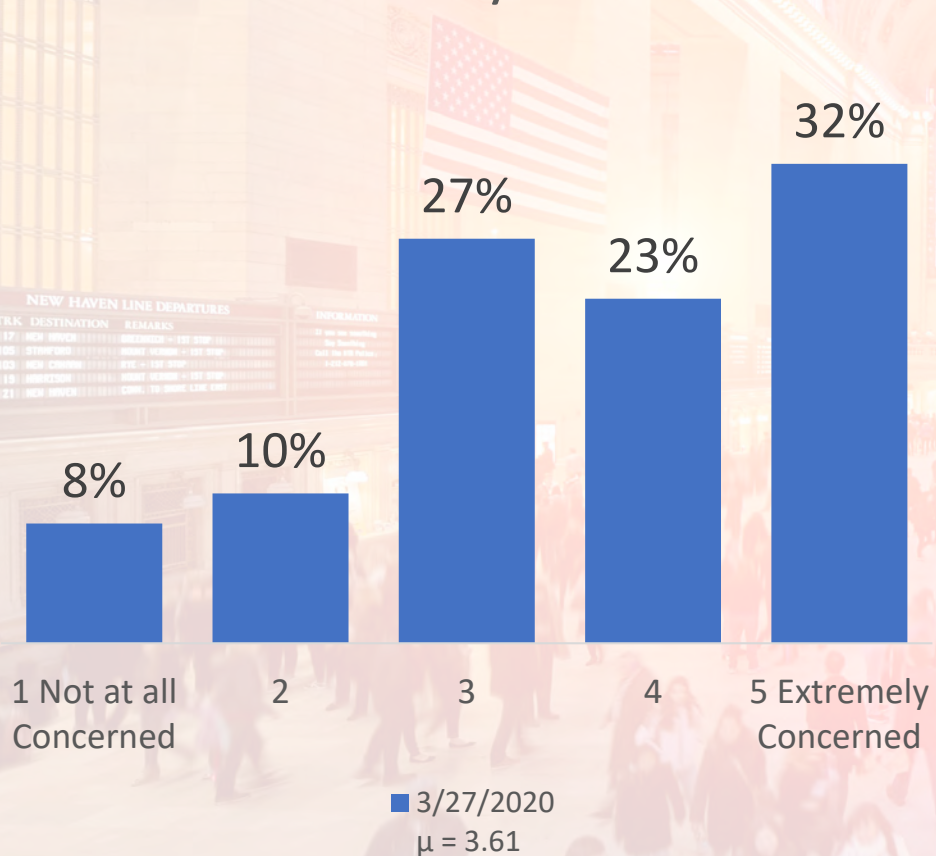
(% Top 2 Box among those who took a business trip in past 12 months; n=567)



■ 3/27/2020

Travelers Are Just As Concerned About Family Members Contracting COVID-19 As They Are About Getting It Themselves

For Myself

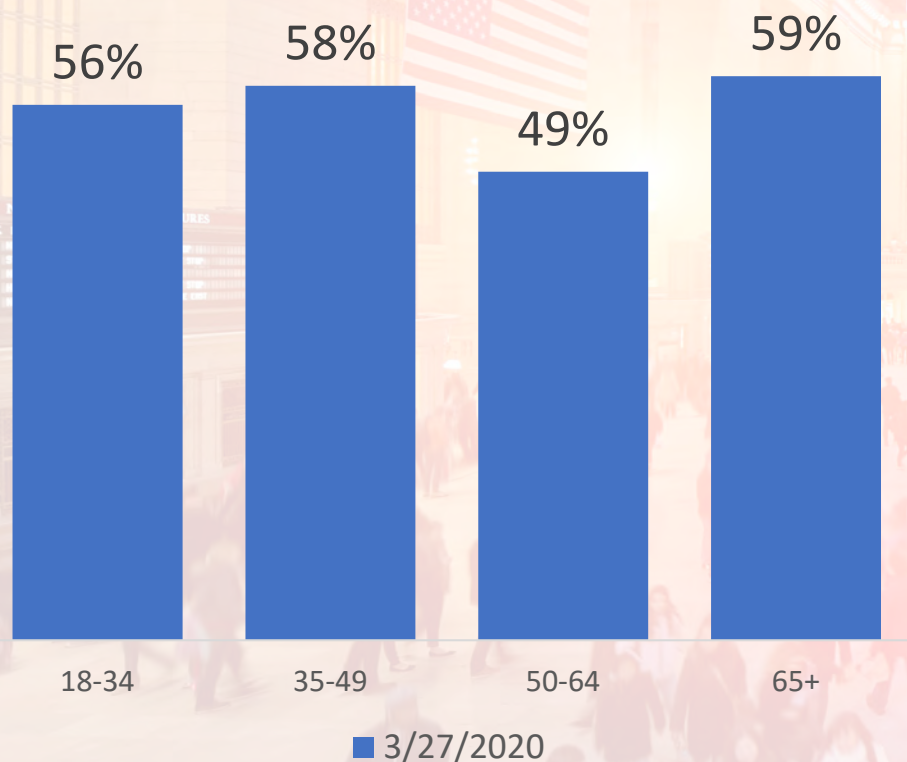


For Others in My Household

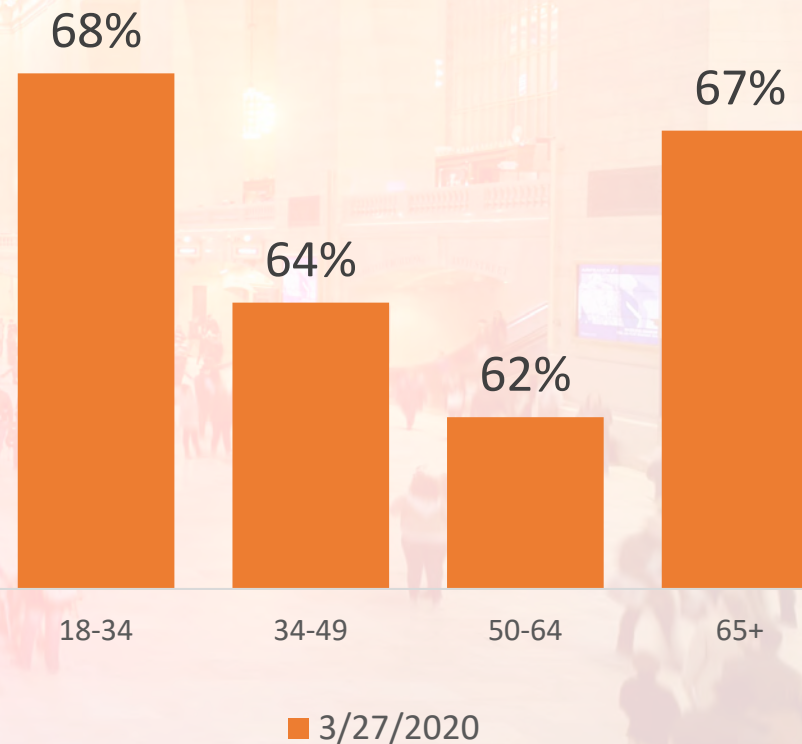


Younger Travelers Are More Likely to Worry More About Others, But They Are Also Concerned About Their Own Health

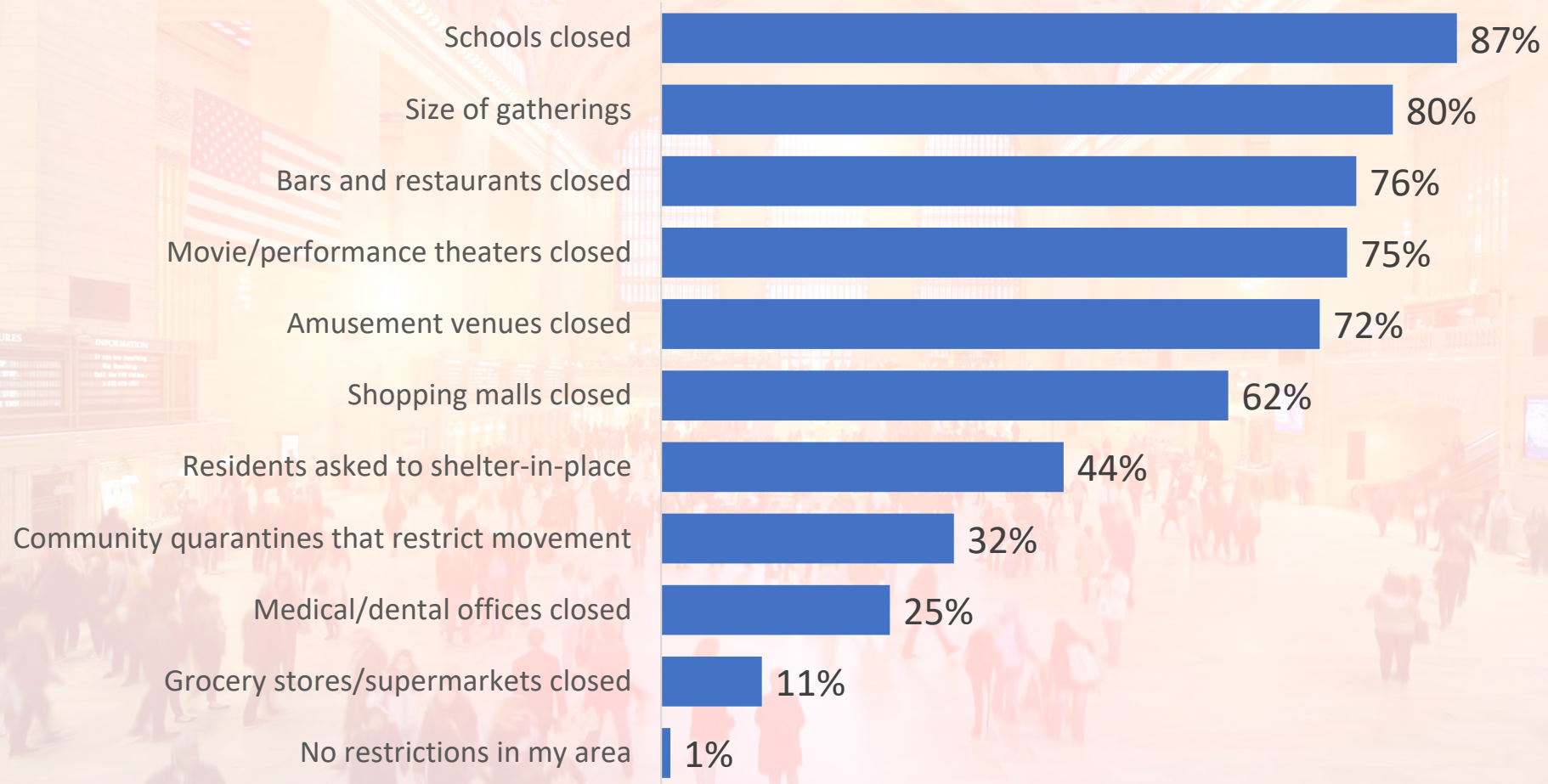
For Myself
by Respondent Age (% Top 2 Box)



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

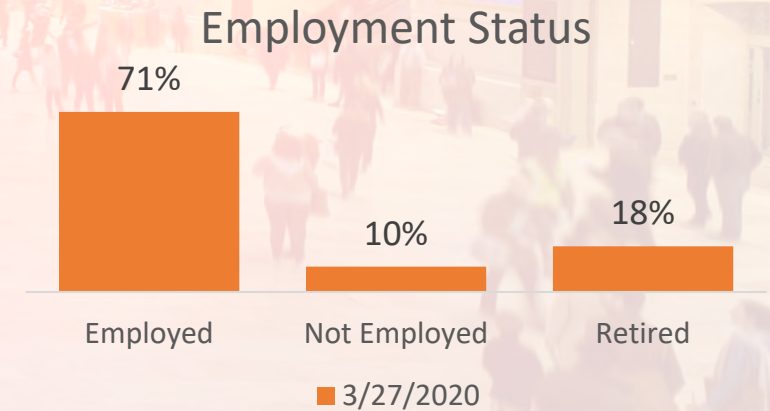
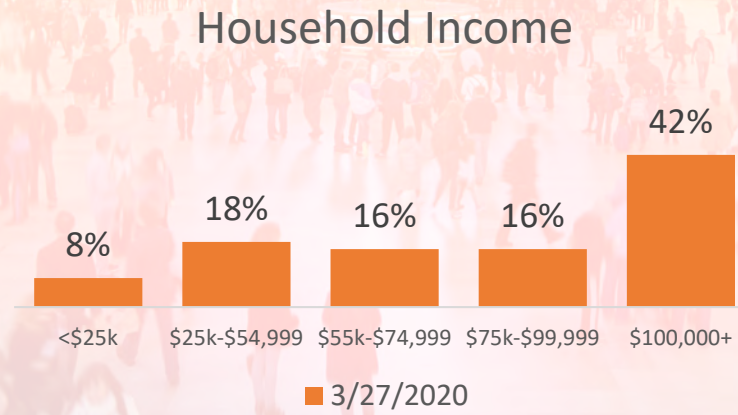
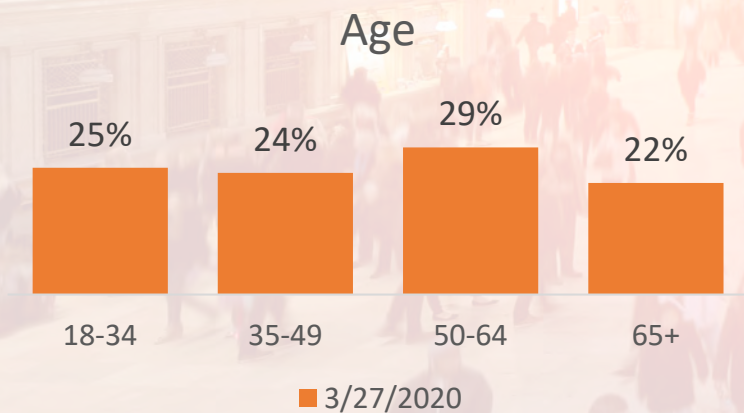
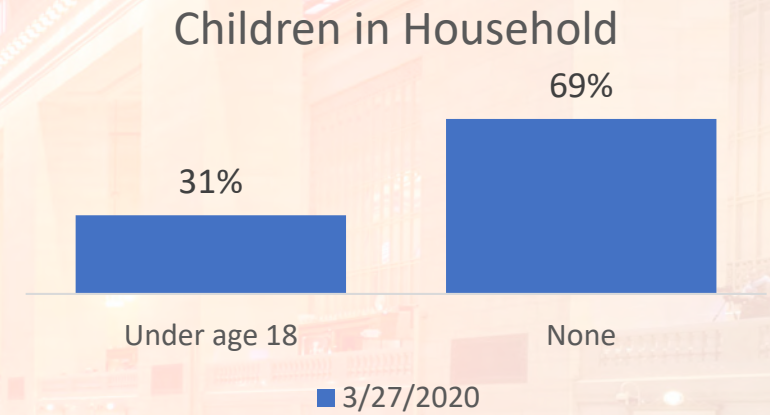
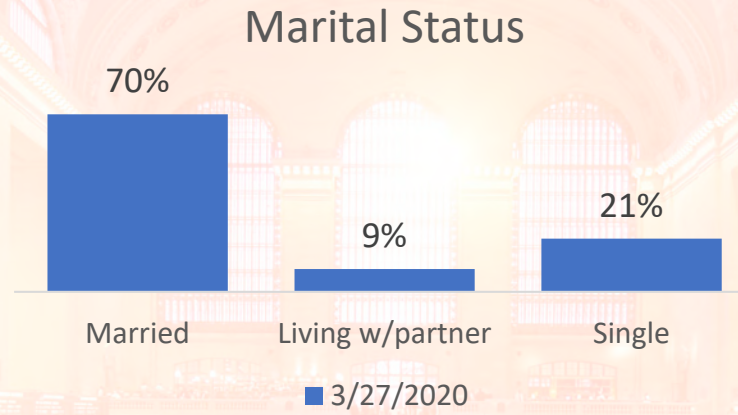
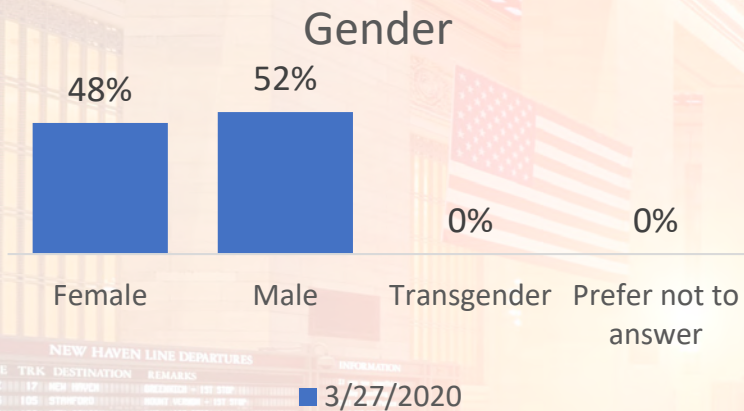


Community Restrictions Imposed as of Date Survey Taken



■ 3/27/2020

Respondent Demographics





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