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

KEY FINDINGS – Wave IV – May 1-6, 2020
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%.

Source: MMGY Travel Intelligence
Approximately one-third of travelers remain committed to postponing, rather than canceling, scheduled travel for the months ahead. Activities with the longest booking windows, such as vacation rental homes and cruises, are still the most likely to remain unchanged.

Travelers continue to feel safest when traveling by personal vehicle (68%), and when visiting outdoor destinations such as parks (34%) and the beach (26%). This, in spite of recent images highlighted on television news programs showing large crowds, on public beaches especially, with little effort to maintain social distancing standards.

Consumers’ intent to travel in the next 6 months continues to be depressed with the likelihood of taking a domestic leisure trip falling slightly from 38% in Wave III to 36% in Wave IV. The factors that have the greatest impact on consumers’ travel plans will be when there is a decline in the spread of COVID-19 and when the CDC reduces its advisory level for travel.

Source: MMGY Travel Intelligence ©2020 U.S. Travel Association, MMGY Global
• In general, travelers don’t expect to venture quite as far for travel once the pandemic subsides. 57% of travelers say they are more likely to book travel to U.S. destinations, 45% say they are likely to travel more by car, and 43% expect to travel to destinations closer to home in the post-pandemic world.

• A third of all travelers (32%) say they are willing to drive at least 300 miles (one-way) to reach their vacation destinations. And, 19% report being willing to drive at least 500 miles. By comparison, just 24% of travelers reported driving at least 300 miles to their vacation destination according to DK Shifflet’s 2019 Performance/Monitor data.

• Overall, younger travelers are the most likely to be engaged in travel activities during the next six months. However, for some activities, such as taking a domestic trip, staying in a hotel/resort, visiting a local, state or national park or going to the beach, the 50-64 age group are the most likely travelers.
• Overall, the concern about personally contracting COVID-19 remains high across all age cohorts in the most recent wave.

• While the youngest respondents’ (age 18-34) concern about contracting COVID-19 themselves declined slightly, the concern they expressed about others in their household contracting it increased from 63% in Wave III to 69% in Wave IV.

• Six in ten respondents said the COVID-19 situation has impacted their work situation in some way, with 31% saying they now work remotely from home, and 14% saying they are now working fewer hours.
90% of Travelers Surveyed Had Travel or Events Planned and Confirmed Prior to COVID-19

Source: MMGY Travel Intelligence
Approximately One-Third of Consumers Maintain Travel Hopes By Postponing Rather Than Canceling Trips

**Travel Booked Prior to COVID-19**

<table>
<thead>
<tr>
<th><em>Question added 4/11</em></th>
<th>Hotel/resort reservation</th>
<th>Domestic flight</th>
<th>Vacation</th>
<th>International flight</th>
<th>Rental car reservation</th>
<th>Conference/convention</th>
<th>Ocean cruise</th>
<th>Off-site business meeting</th>
<th>Vacation rental home</th>
<th>Group tour package</th>
<th>River cruise</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/11</td>
<td>64%</td>
<td>64%</td>
<td>58%</td>
<td>47%</td>
<td>60%</td>
<td>67%</td>
<td>65%</td>
<td>64%</td>
<td>64%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>4/24</td>
<td>66%</td>
<td>64%</td>
<td>56%</td>
<td>55%</td>
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<td>57%</td>
<td>55%</td>
<td>62%</td>
<td>55%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>5/8</td>
<td>64%</td>
<td>61%</td>
<td>58%</td>
<td>47%</td>
<td>61%</td>
<td>65%</td>
<td>55%</td>
<td>60%</td>
<td>55%</td>
<td>49%</td>
<td>47%</td>
</tr>
</tbody>
</table>

*Events Booked Prior to COVID-19*

<table>
<thead>
<tr>
<th><em>Question added 4/11</em></th>
<th>Bars/restaurants</th>
<th>Celebrations (weddings, reunions, etc.)</th>
<th>Live sporting event</th>
<th>Live music concert</th>
<th>Live theatrical performance</th>
<th>Theme/amusement park</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/11</td>
<td>64%</td>
<td>42%</td>
<td>58%</td>
<td>56%</td>
<td>54%</td>
<td>48%</td>
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<tr>
<td>4/24</td>
<td>65%</td>
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<td>64%</td>
<td>58%</td>
<td>54%</td>
<td>43%</td>
</tr>
<tr>
<td>5/8</td>
<td>56%</td>
<td>52%</td>
<td>56%</td>
<td>56%</td>
<td>54%</td>
<td>47%</td>
</tr>
</tbody>
</table>

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Travelers Continue to Feel Safest in Cars, Parks, and at the Beach

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

- Personal cars: 68% (n=1,200)
- Vacation rental homes/condos: 20% (n=1,200)
- Overnight domestic trip**: 25% (n=1,200)
- Hotels/resorts: 18% (n=1,200)
- Domestic flights: 18% (n=1,200)
- Trains/railways: 14% (n=1,200)
- Overnight international trip**: 13% (n=1,200)
- River cruise*: 11% (n=1,200)
- Ocean cruise*: 9% (n=1,200)
- International flights: 9% (n=1,200)
- Cruises*: 12% (n=1,200)

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

- Parks: 34% (n=1,200)
- Grocery stores/supermarkets: 26% (n=1,200)
- Beaches**: 29% (n=1,200)
- Places of worship: 17% (n=1,200)
- Off-site business meetings: 16% (n=1,200)
- Outdoor sporting events: 18% (n=1,200)
- Schools: 16% (n=1,200)
- Outdoor concerts/festivals: 14% (n=1,200)
- Shopping malls: 16% (n=1,200)
- Visitors to my town***: 13% (n=1,200)
- Bars/restaurants: 13% (n=1,200)
- Indoor concerts/festivals: 13% (n=1,200)
- Performance/movie theater: 13% (n=1,200)
- Indoor sporting events: 13% (n=1,200)
- Conferences/conventions: 13% (n=1,200)

Source: MMGY Travel Intelligence

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Travelers Will be Less Eager to Travel For Business Following the Pandemic, Even by Car

Source: MMGY Travel Intelligence

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

% Top 2 Box

- Travel within U.S. rather than internationally**
  - 54% (5/8)
  - 57% (4/24)
  - 57% (4/11)
  - n=1,200
- Be eager to travel for leisure
  - 52% (5/8)
  - 59% (4/24)
  - 59% (4/11)
  - n=1,200
- Travel more often for vacation by car
  - 45% (5/8)
  - 47% (4/24)
  - 47% (4/11)
  - n=1,200
- Select destinations closer to home
  - 35% (5/8)
  - 36% (4/24)
  - 36% (4/11)
  - n=1,200
- Take more day trips
  - 33% (5/8)
  - 39% (4/24)
  - 39% (4/11)
  - n=1,200
- Travel for business by car**
  - 29% (5/8)
  - 32% (4/24)
  - 32% (4/11)
  - n=1,200
- Be eager to travel for leisure
  - 22% (5/8)
  - 26% (4/24)
  - 26% (4/11)
  - n=1,200

Source: MMGY Travel Intelligence

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Question added 4/11
** Added 4/24
The Likelihood of Taking a Domestic Trip During the Next Six Months Dropped Slightly in Wave IV

Source: MMGY Travel Intelligence

Take a Domestic Leisure Trip (% Top 2 Box; 5-point Scale)
- 3/27: 39% (n=1,200)
- 4/11: 31% (n=1,200)
- 4/24: 38% (n=1,200)
- 5/8: 36% (n=1,200)

Take a Domestic Business Trip (% Top 2 Box; 5-point Scale)
- 3/27: 26% (n=1,200)
- 4/11: 21% (n=1,200)
- 4/24: 21% (n=1,200)
- 5/8: 19% (n=1,200)

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One in Five Travelers are Willing to Drive 500 or More Miles One-Way for a Leisure Trip During the Next Six Months

Source: MMGY Travel Intelligence

Miles Willing to Drive (one-way)
For a Domestic Leisure Trip
(among those traveling for leisure in past 12 months)

Miles Willing to Drive (one-way)
For a Domestic Business Trip
(among those traveling for business in past 12 months)

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Travelers Remain Hesitant About Engaging in Most Travel Experiences During the Next Six Months

Transportation and Lodging

- Travel by personal car**: 68% (5/8) 67% (4/24) 63% (4/11) 62% (3/27)
- Take a domestic flight: 32% (5/8) 32% (4/24) 31% (4/11) 39% (3/27)
- Stay in a hotel/resort: 31% (5/8) 36% (4/24) 33% (4/11) 41% (3/27)
- Stay in a vacation home/condo: 23% (5/8) 20% (4/24) 24% (4/11) 22% (3/27)
- Take an international flight: 18% (5/8) 19% (4/24) 18% (4/11) 21% (3/27)
- Travel by train/rail: 15% (5/8) 16% (4/24) 14% (4/11) 19% (3/27)
- Travel by bus: 12% (5/8) 13% (4/24) 13% (4/11) 14% (3/27)

Trip Type

- Take domestic leisure trip: 36% (5/8) 38% (4/24) 31% (4/11) 39% (3/27)
- Take domestic business trip: 19% (5/8) 21% (4/24) 21% (4/11) 26% (3/27)
- Take international leisure trip: 19% (5/8) 20% (4/24) 22% (4/11) 22% (3/27)
- Take international business trip: 13% (5/8) 14% (4/24) 13% (4/11) 15% (3/27)
- Take a group tour: 12% (5/8) 12% (4/24) 11% (4/11) 15% (3/27)
- Ocean cruise*: 12% (5/8) 12% (4/24) 12% (4/11) 13% (3/27)
- River Cruise*: 10% (5/8) 12% (4/24) 11% (4/11) 11% (3/27)

Events

- Visit a park (local, state, national, etc.)*: 49% (5/8) 48% (4/24) 48% (4/11) 49% (3/27)
- Visit a bar/restaurant: 35% (5/8) 35% (4/24) 37% (4/11) 37% (3/27)
- Visit a beach**: 38% (5/8) 40% (4/24) 40% (4/11) 49% (3/27)
- Attend a conference or convention: 15% (5/8) 15% (4/24) 16% (4/11) 15% (3/27)
- Attend an off-site business meeting: 16% (5/8) 17% (4/24) 19% (4/11) 18% (3/27)
- Attend a live theater performance: 15% (5/8) 15% (4/24) 17% (4/11) 19% (3/27)
- Attend a live sporting event: 19% (5/8) 19% (4/24) 19% (4/11) 23% (3/27)
- Attend a live concert: 17% (5/8) 18% (4/24) 22% (4/11) 23% (3/27)
- Visit a theme/amusement park: 15% (5/8) 15% (4/24) 17% (4/11) 20% (3/27)

Source: MMGY Travel Intelligence

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

Source: MMGY Travel Intelligence

% Top 2 Box

Transportation & Lodging

Trip Type

Events

- 5/8 Overnight Business Travel in Past 12 Mo. (n=625)
- 4/24 Overnight Leisure Travel in Past 12 Mo. (n=1,175)

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Younger Travelers Expected to be Most Engaged in Travel Activities the During Next Six Months

Source: MMGY Travel Intelligence

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Travelers From the South More Likely to Engage in Most Travel Activities During Next Six Months

Source: MMGY Travel Intelligence

% Top 2 Box

Transportation & Lodging

Trip Type

Events

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Slowing the Spread of COVID-19 Even More Impactful Than Great Travel Deals in Making Travel Decisions

% Top 2 Box among all travelers

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

Source: MMGY Travel Intelligence

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Most Public Venues Remain Closed

Source: MMGY Travel Intelligence

- Schools closed: 86% / 87% / 87%
- Movie/performance theaters closed: 81% / 83%
- Size of gatherings: 82% / 82%
- Amusement venues closed: 80% / 80%
- Bars and restaurants closed: 80% / 80%
- Shopping malls closed: 75% / 75%
- Residents asked to shelter-in-place: 73% / 74%
- Community quarantines that restrict movement: 51% / 51%
- Medical/dental offices closed: 50% / 50%
- Grocery stores/supermarkets closed: 48% / 48%
- Movie/performance theaters closed: 48% / 48%
- Size of gatherings: 45% / 45%
- Amusement venues closed: 44% / 44%
- Bars and restaurants closed: 44% / 44%
- Shopping malls closed: 62% / 62%
- Residents asked to shelter-in-place: 73% / 74%
- Community quarantines that restrict movement: 74% / 74%
- Medical/dental offices closed: 51% / 51%
- Grocery stores/supermarkets closed: 39% / 39%
- Size of gatherings: 25% / 25%
- Amusement venues closed: 10% / 10%
- Bars and restaurants closed: 10% / 10%
- Shopping malls closed: 11% / 11%
- Residents asked to shelter-in-place: 0% / 0%
- Community quarantines that restrict movement: 0% / 0%
- Medical/dental offices closed: 1% / 1%
- Grocery stores/supermarkets closed: 1% / 1%

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Personal Concern for Contracting COVID-19 Declines, Extreme Concern for Others in the Household Stays the Same

Source: MMGY Travel Intelligence

For Myself

1 Not at all Concerned | 2 | 3 | 4 | 5 Extremely Concerned
--- | --- | --- | --- | ---
1 Not at all Concerned | 8% | 15% | 27% | 34% | 40%
2 | 5% | 13% | 24% | 25% | 33%
3 | 6% | 23% | 24% | 30% | 34%
4 | 8% | 25% | 25% | 36% | 40%
5 Extremely Concerned | 5% | 13% | 24% | 25% | 33%

µ = 3.61 n=1,200

µ = 3.71 n=1,200

µ = 3.62 n=1,200

µ = 3.56 n=1,200

For Others in My Household

1 Not at all Concerned | 2 | 3 | 4 | 5 Extremely Concerned
--- | --- | --- | --- | ---
1 Not at all Concerned | 6% | 9% | 7% | 4%
2 | 4% | 9% | 9% | 5%
3 | 5% | 11% | 10% | 6%
4 | 6% | 11% | 18% | 7%
5 Extremely Concerned | 7% | 11% | 17% | 8%

µ = 3.83 n=1,078

µ = 3.92 n=1,126

µ = 3.92 n=1,123

µ = 3.79 n=1,102

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Concern About Contracting COVID-19 Increased Among Some Age Groups As Did Concern for Others in Household

Source: MMGY Travel Intelligence

For Myself
by Respondent Age (% Top 2 Box)

<table>
<thead>
<tr>
<th>Age</th>
<th>Total</th>
<th>18-34</th>
<th>35-49</th>
<th>50-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/27</td>
<td>55%</td>
<td>56%</td>
<td>58%</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>4/11</td>
<td>56%</td>
<td>61%</td>
<td>60%</td>
<td>57%</td>
<td>69%</td>
</tr>
<tr>
<td>4/24</td>
<td>56%</td>
<td>55%</td>
<td>56%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>5/8</td>
<td>60%</td>
<td>59%</td>
<td>59%</td>
<td>57%</td>
<td>61%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Age</th>
<th>Total</th>
<th>18-34</th>
<th>35-49</th>
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<td>61%</td>
</tr>
</tbody>
</table>

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Concern About Contracting COVID-19 Declined Across All Regions Except West, Concern for Others Increased in all Regions except South

Source: MMGY Travel Intelligence

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National/Local Broadcast TV News is the Information Source Most Respondents Rely on for News on COVID-19

- Local TV news (ABC, NBC, FOX, etc.): 48% (5/8) vs. 48% (4/24)
- National TV news (ABC, NBC, FOX, etc.): 48% (5/8) vs. 48% (4/24)
- National cable TV news (CNN, MSNBC, etc.): 48% (5/8) vs. 48% (4/24)
- CDC and FEMA/DHS updates/emails/websites: 40% (5/8) vs. 40% (4/24)
- Internet searches (Google, Bing, etc.): 39% (5/8) vs. 39% (4/24)
- Local cable TV news (local CNN, MSNBC, etc.): 31% (5/8) vs. 31% (4/24)
- National newspapers (New York Times, USA Today, etc.): 32% (5/8) vs. 32% (4/24)
- Local newspapers: 29% (5/8) vs. 29% (4/24)
- Conversations with friends/family: 27% (5/8) vs. 27% (4/24)
- Local news/talk radio stations: 31% (5/8) vs. 31% (4/24)
- National Public Radio: 25% (5/8) vs. 25% (4/24)
- None listed: 3% (5/8) vs. 3% (4/24)

Source: MMGY Travel Intelligence

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### Six in Ten Have Experienced Work Life Changes With Almost One-third Going Home to Work

Source: MMGY Travel Intelligence

<table>
<thead>
<tr>
<th>Impact of COVID-19 on Employment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working from home</td>
<td>31%</td>
</tr>
<tr>
<td>Reduced hours</td>
<td>14%</td>
</tr>
<tr>
<td>Working more hours</td>
<td>11%</td>
</tr>
<tr>
<td>Reduced salary</td>
<td>10%</td>
</tr>
<tr>
<td>Laid off with re-hire promise</td>
<td>9%</td>
</tr>
<tr>
<td>Laid off without re-hire promise</td>
<td>8%</td>
</tr>
<tr>
<td>No impact</td>
<td>15%</td>
</tr>
<tr>
<td>Not employed prior to COVID-19</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Not employed prior to COVID-19**

- 24%
- 5/8
- n=1,200

Source: MMGY Travel Intelligence

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Respondent Demographics

Source: MMGY Travel Intelligence

Gender
- Female: 47%
- Male: 52%
- Transgender: 1%
- Prefer not to answer: 0%

Age
- 18-34: 25%
- 35-49: 24%
- 50-64: 28%
- 65+: 22%

Employment Status
- Employed: 70%
- Not Employed: 29%
- Retired: 19%

Children in Household
- Under age 18: 31%
- None: 69%

Household Income
- <$25k: 8%
- $25k-$54,999: 20%
- $55k-$74,999: 15%
- $75k-$99,999: 16%
- $100k+: 42%

Marital Status
- Married: 69%
- Living with partner: 69%
- Single: 22%

Political Affiliation*
- Democrat: 36%
- Independent: 28%
- Republican: 31%
- None: 3%
- Prefer not to answer: 2%