



U.S. TRAVEL

A S S O C I A T I O N[®]

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

KEY FINDINGS – Wave IV – May 1-6, 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

- 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.

KEY INSIGHTS

- 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.

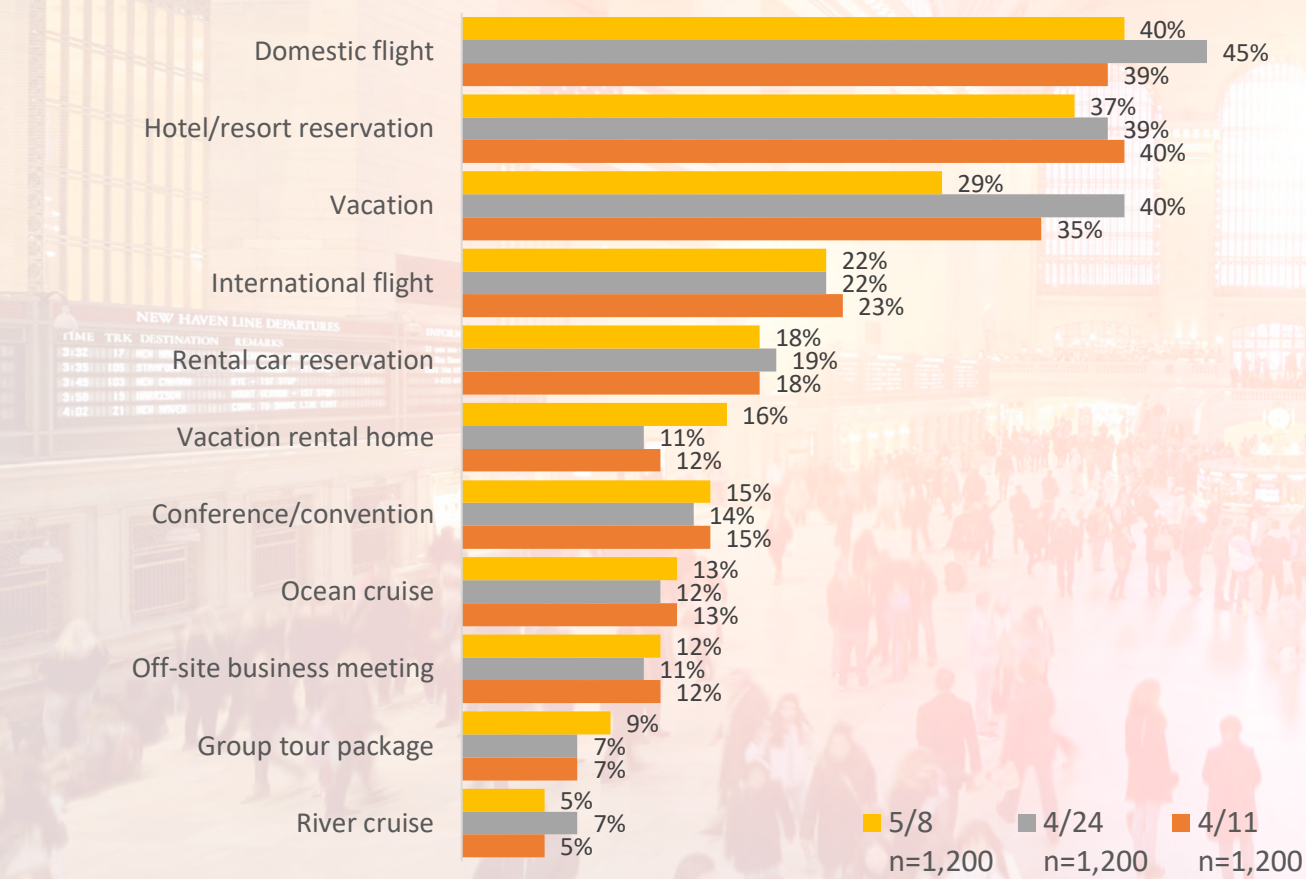
KEY INSIGHTS

- 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.

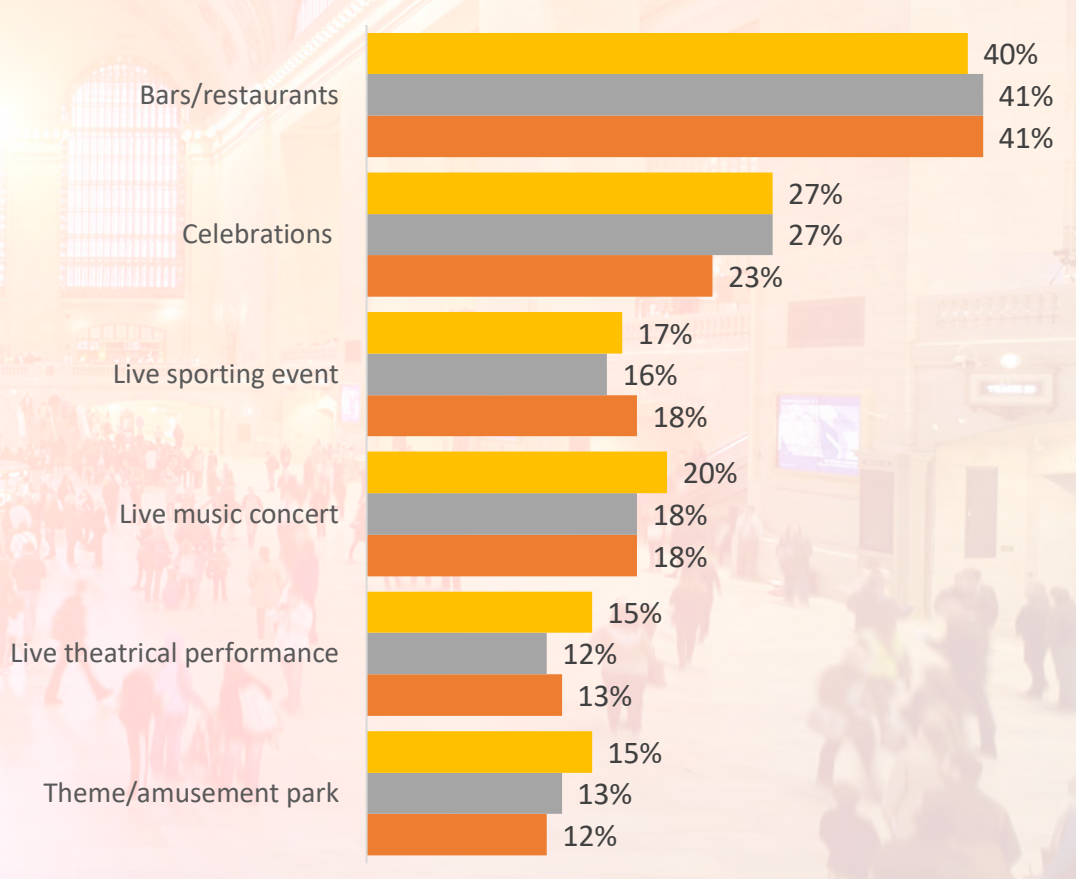
90% of Travelers Surveyed Had Travel or Events Planned and Confirmed Prior to COVID-19

*Question added 4/11

Travel Booked Prior to COVID-19



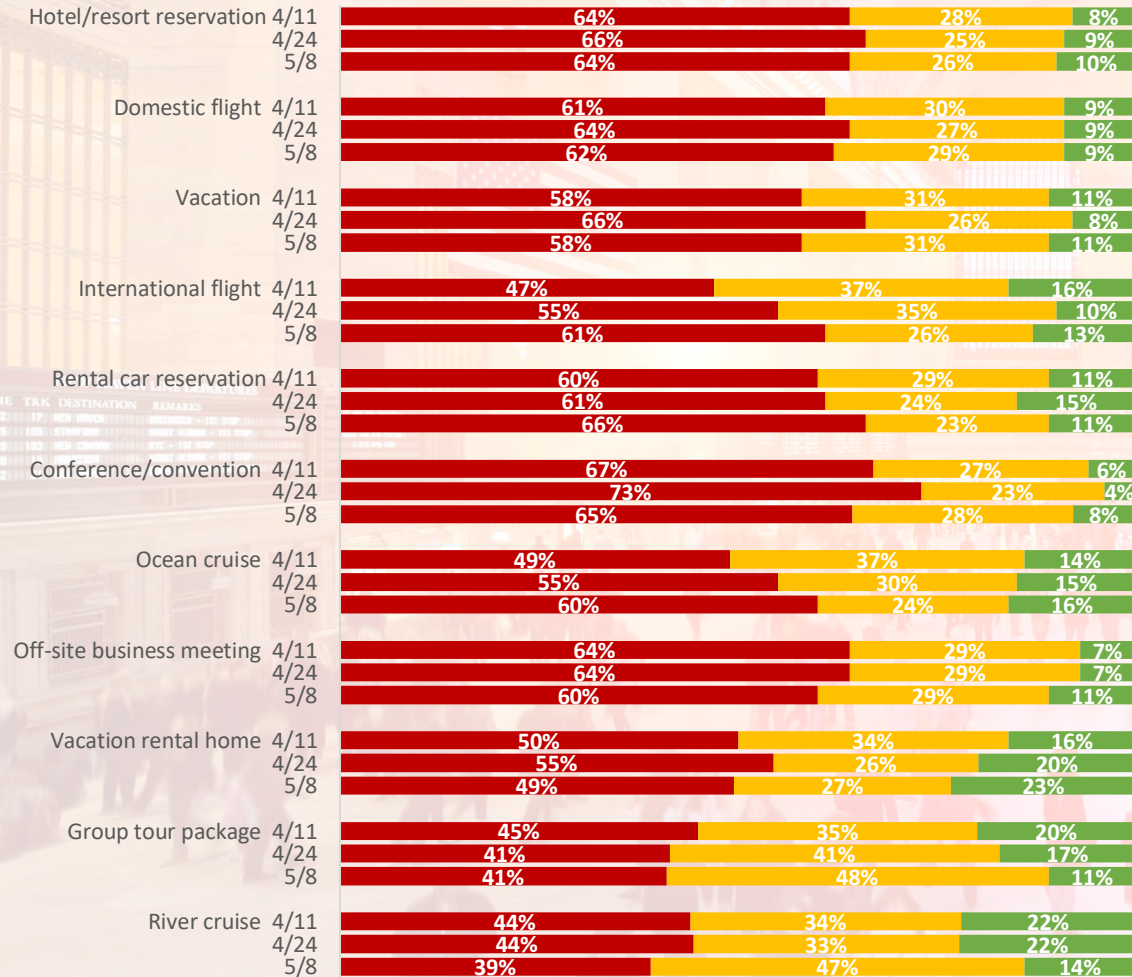
Events Booked Prior to COVID-19



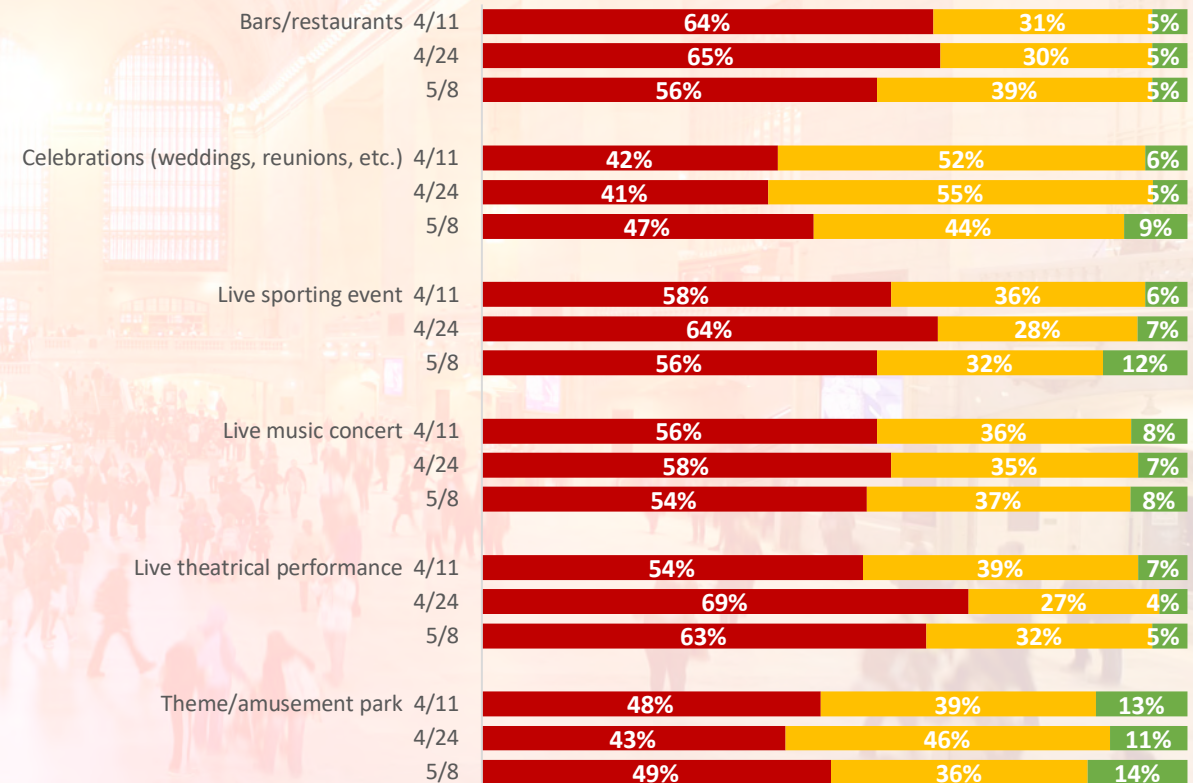
Approximately One-Third of Consumers Maintain Travel Hopes By Postponing Rather Than Canceling Trips

*Question added 4/11

Travel Booked Prior to COVID-19



Events Booked Prior to COVID-19



■ Canceled ■ Postponed ■ Continuing as Planned

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

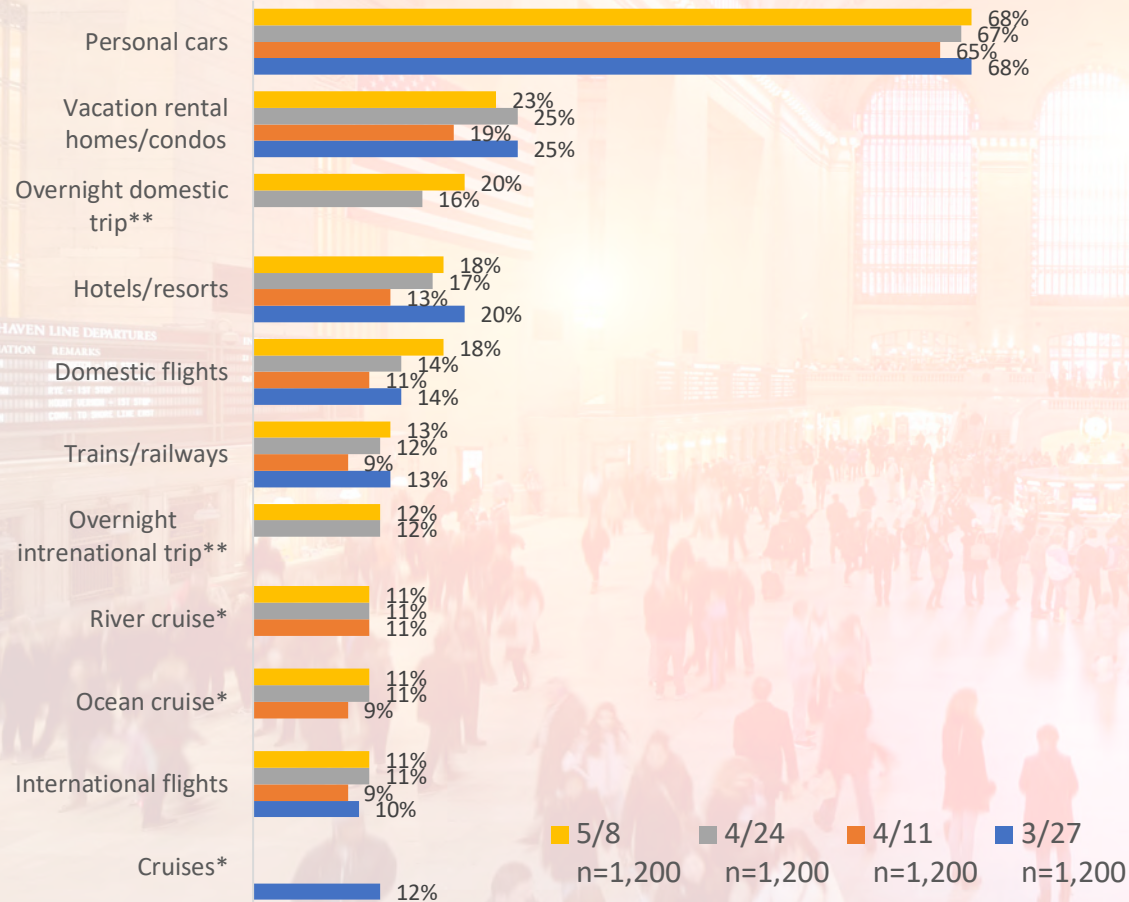
*Added/Deleted 4/11

**Added 4/24

***Added 5/8

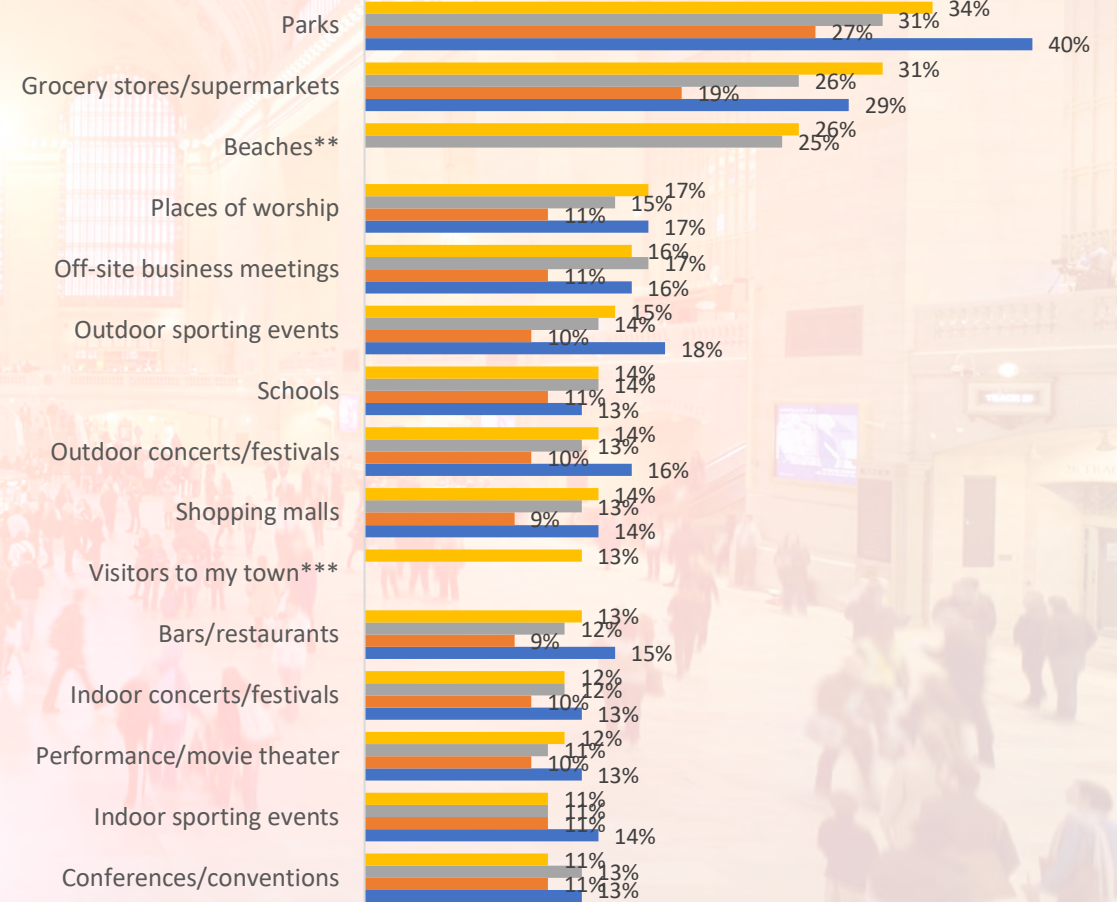
Transportation and Lodging

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



Activities and Venues

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



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

Question added 4/11
**Added 4/24

After the Coronavirus (COVID-19) Has Passed, I Will.....
% Top 2 Box

Travel within U.S. rather than internationally**

Be eager to travel for leisure

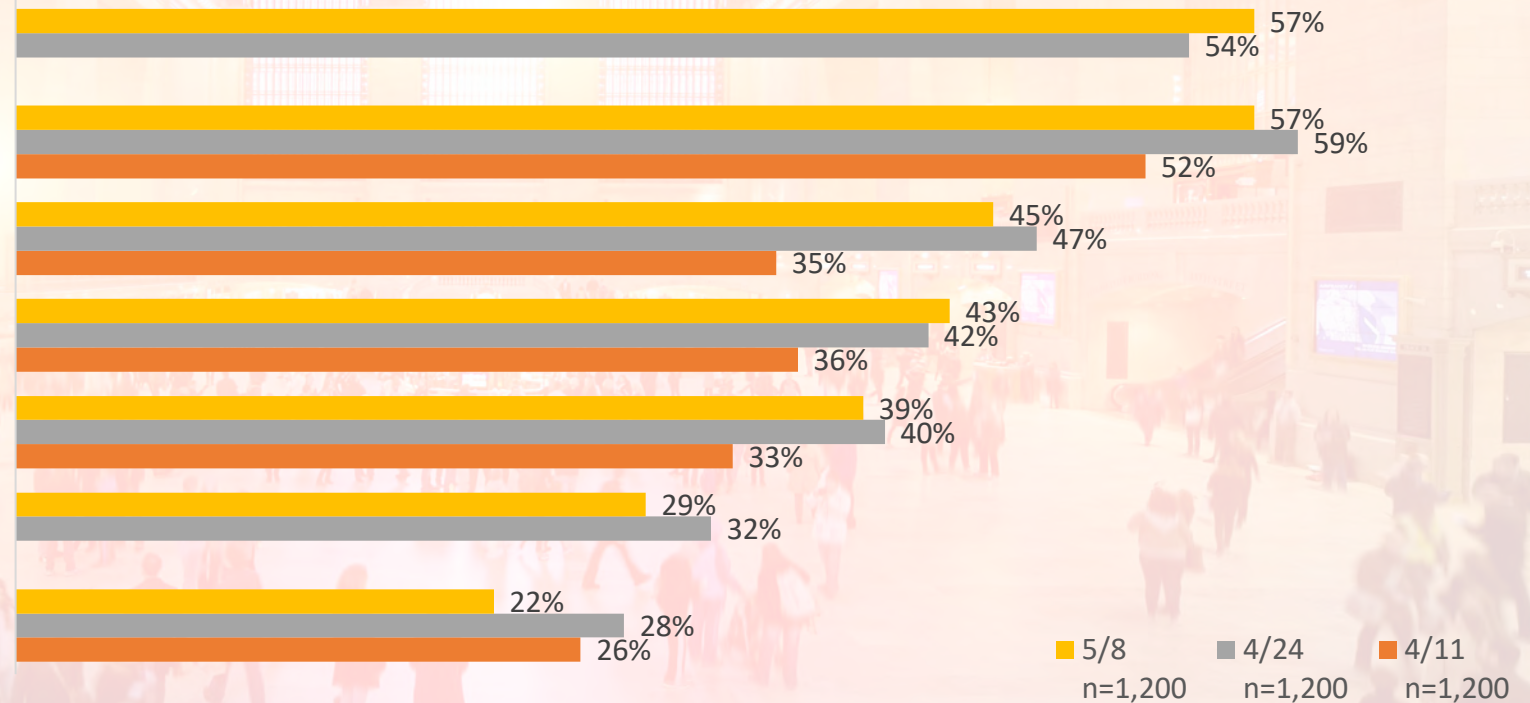
Travel more often for vacation by car

Select destinations closer to home

Take more day trips

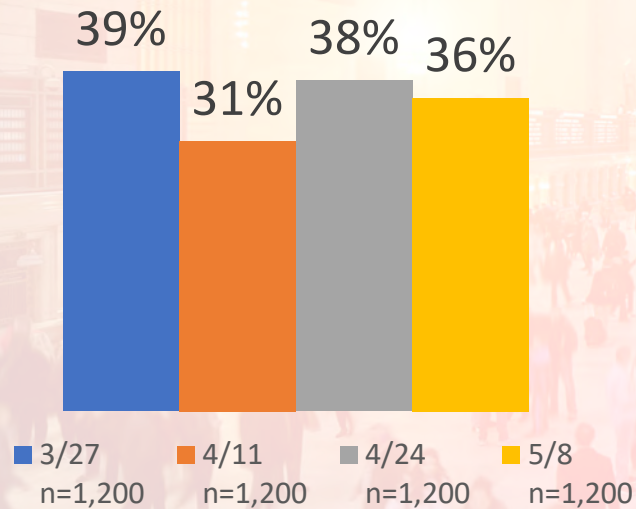
Travel for business by car**

Be eager to travel for business

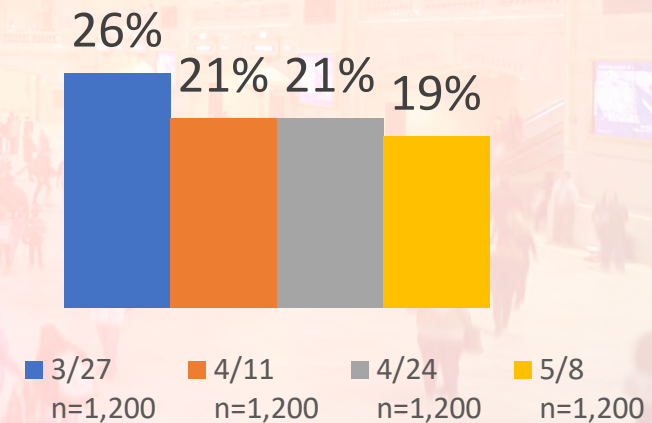


The Likelihood of Taking a Domestic Trip During the Next Six Months Dropped Slightly in Wave IV

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



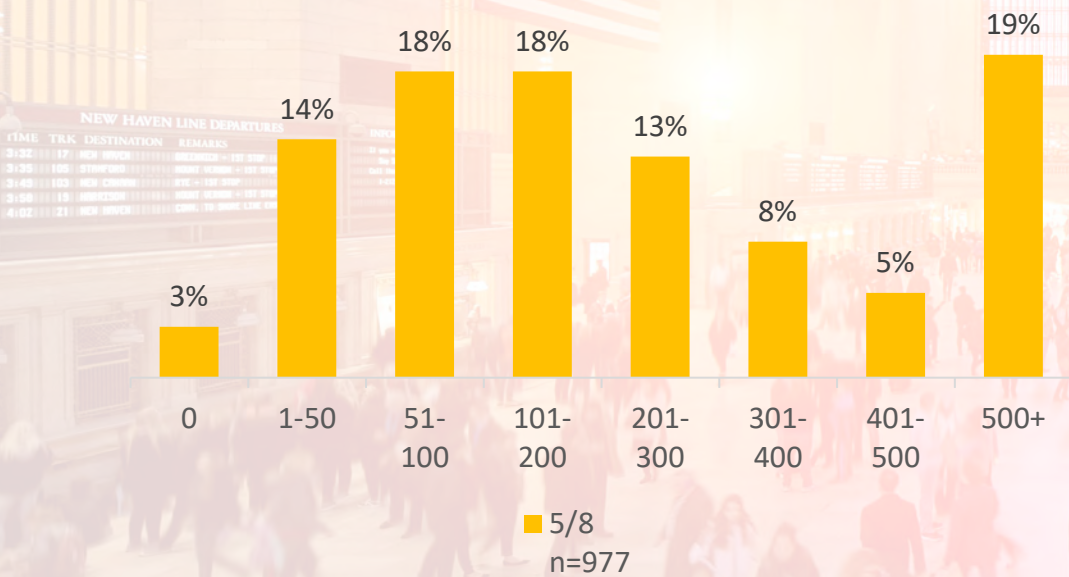
Take a Domestic Business Trip
(% Top 2 Box; 5-point Scale)



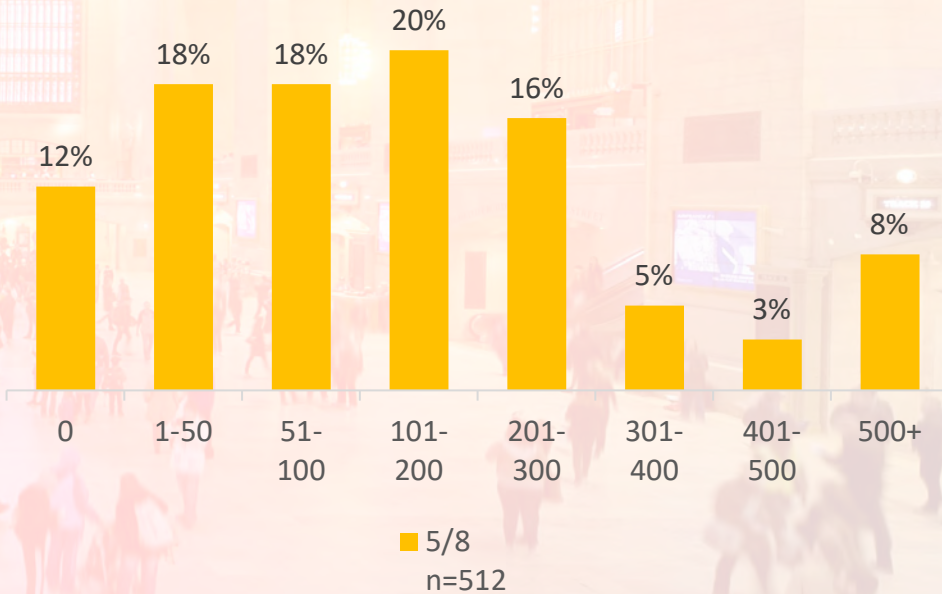
One in Five Travelers are Willing to Drive 500 or More Miles One-Way for a Leisure Trip During the Next Six Months

Question added 5/8

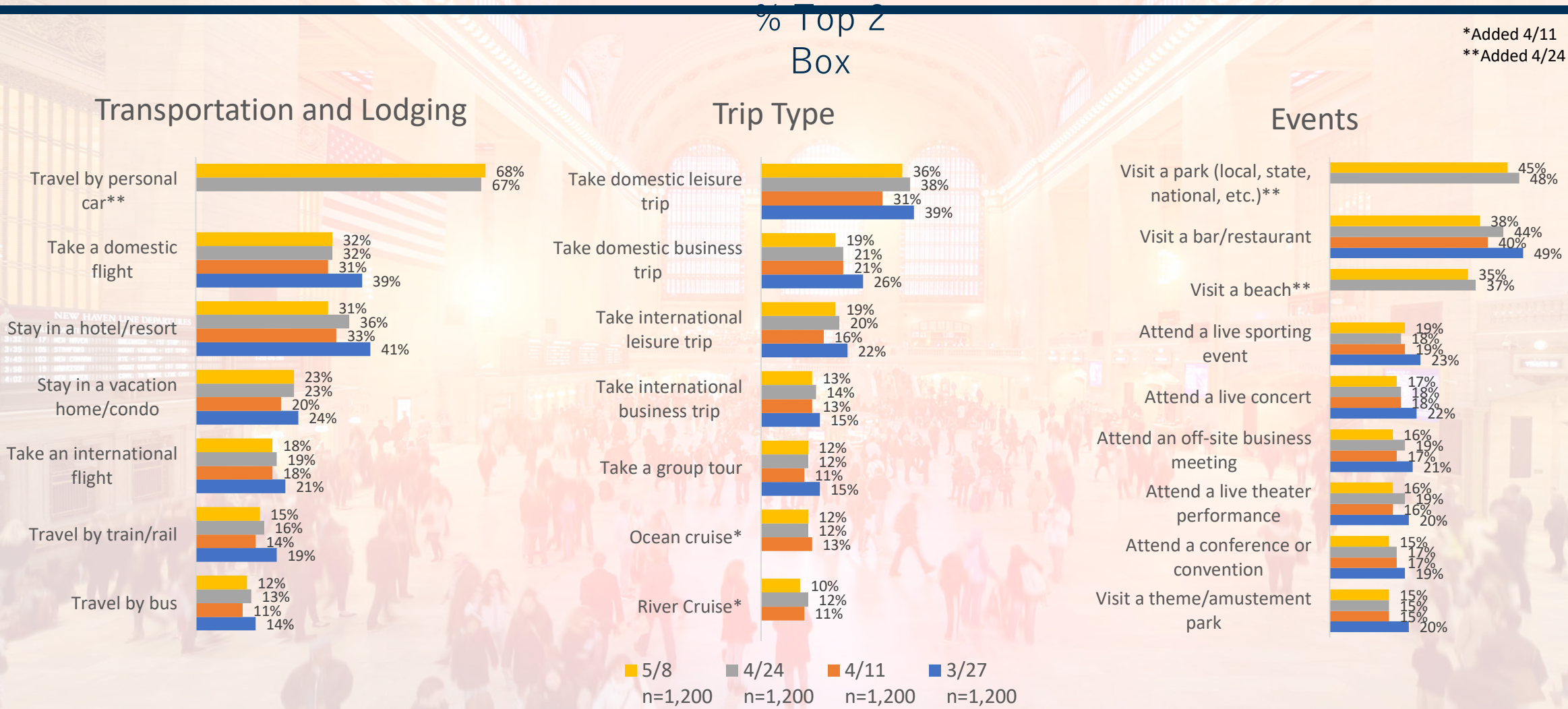
Miles Willing to Drive (one-way)
For a Domestic Leisure Trip
(among those traveling for leisure in past 12 months)



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



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



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

*Added 4/11
**Added 4/24

% Top 2 Box

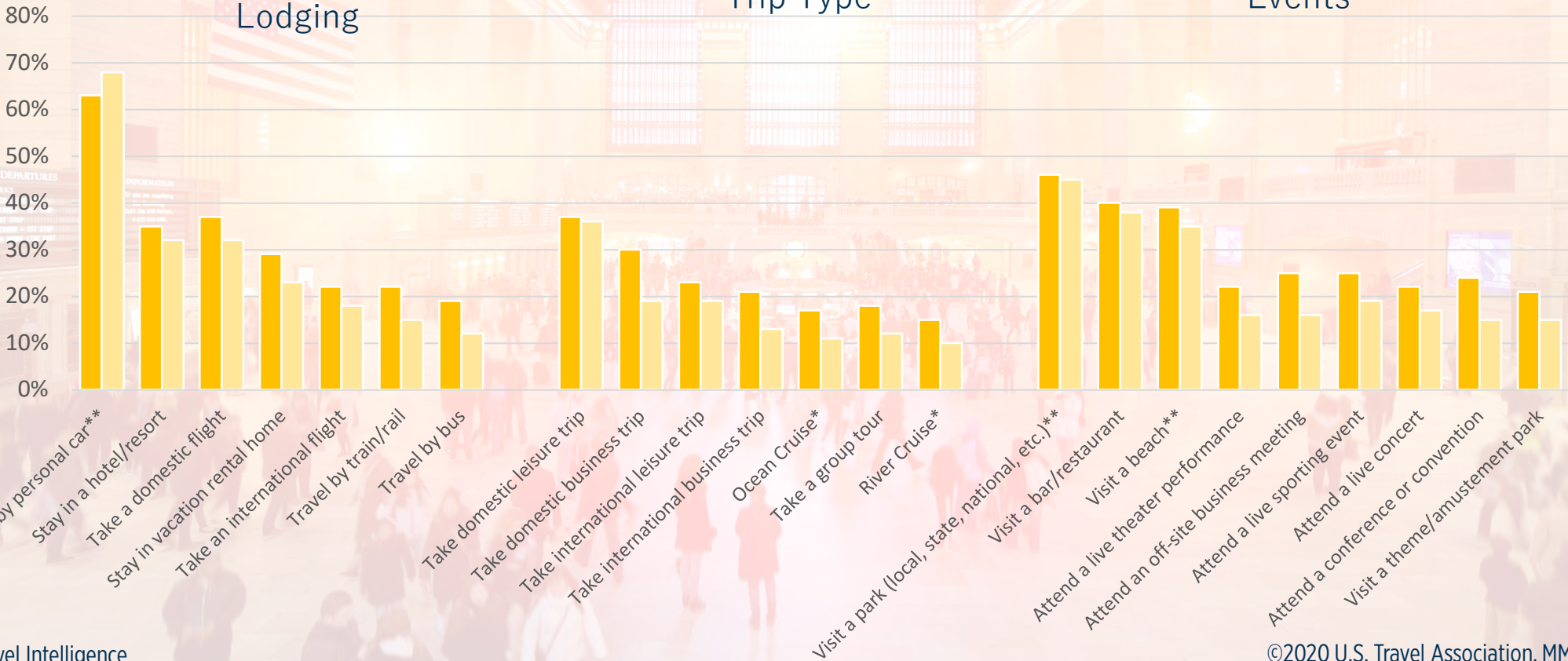
■ 5/8 Overnight Business Travel in Past 12 Mo. (n=625)

■ 4/24 Overnight Leisure Travel in Past 12 Mo. (n=1,175)

Transportation & Lodging

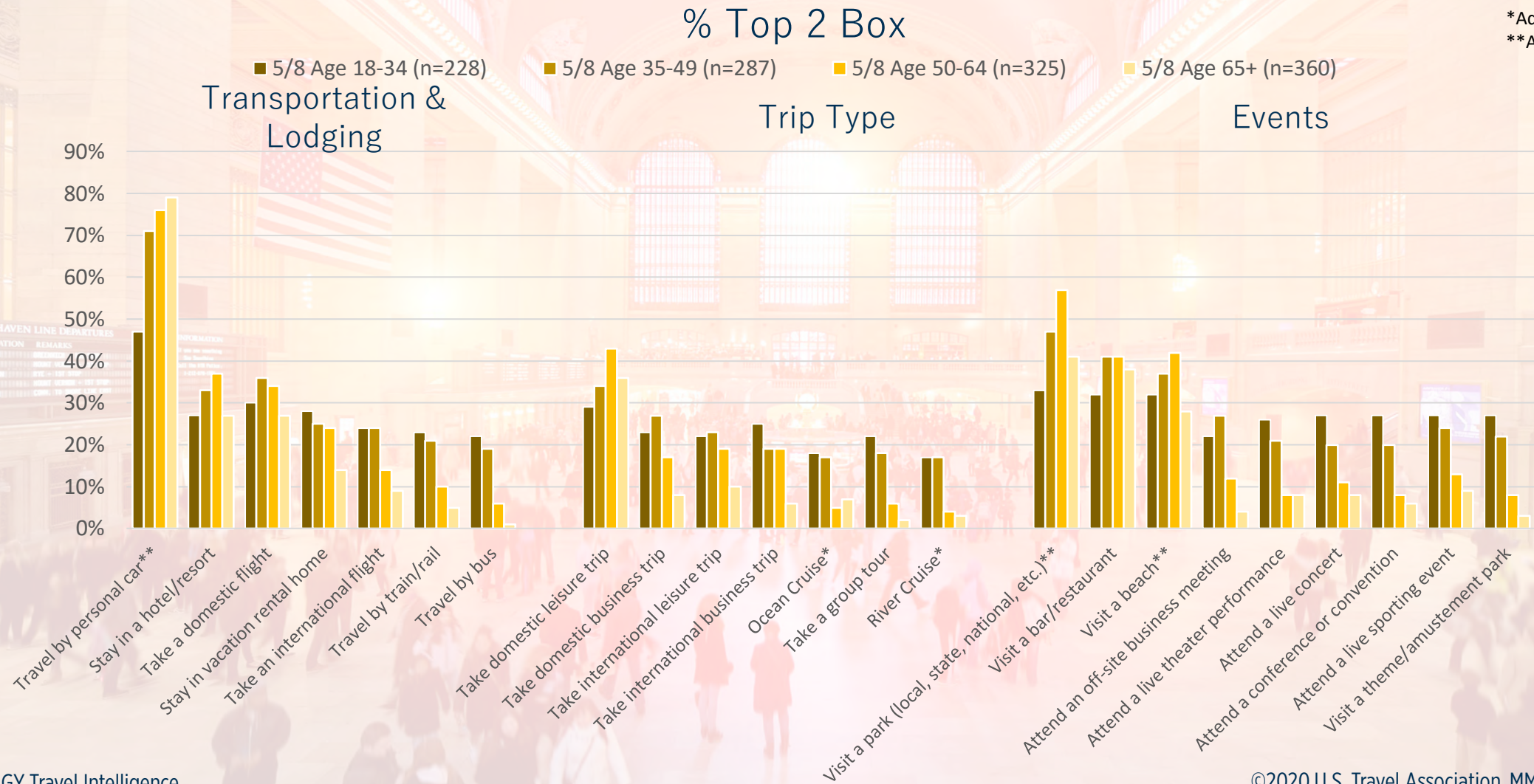
Trip Type

Events

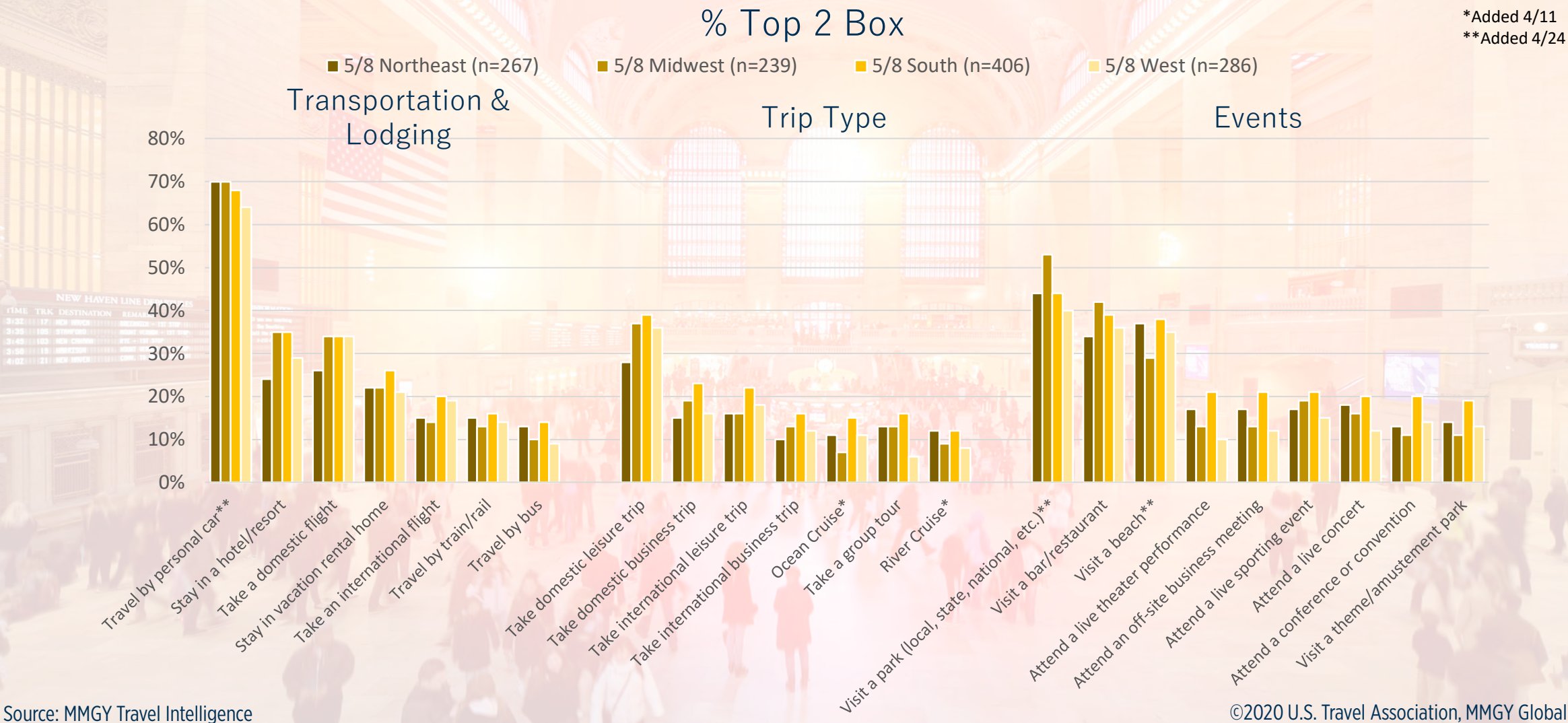


Younger Travelers Expected to be Most Engaged in Travel Activities the During Next Six Months

*Added 4/11
**Added 4/24



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

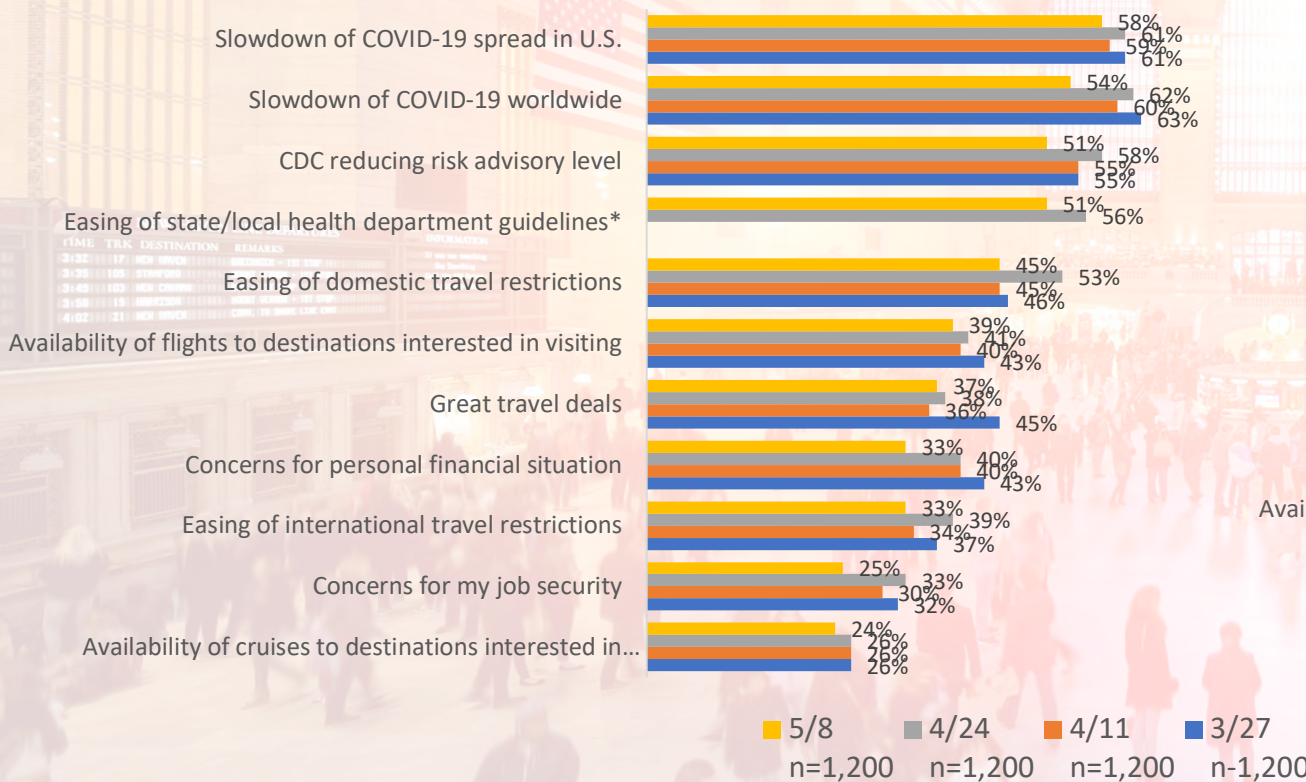


Slowing the Spread of COVID-19 Even More Impactful Than Great Travel Deals in Making Travel Decisions

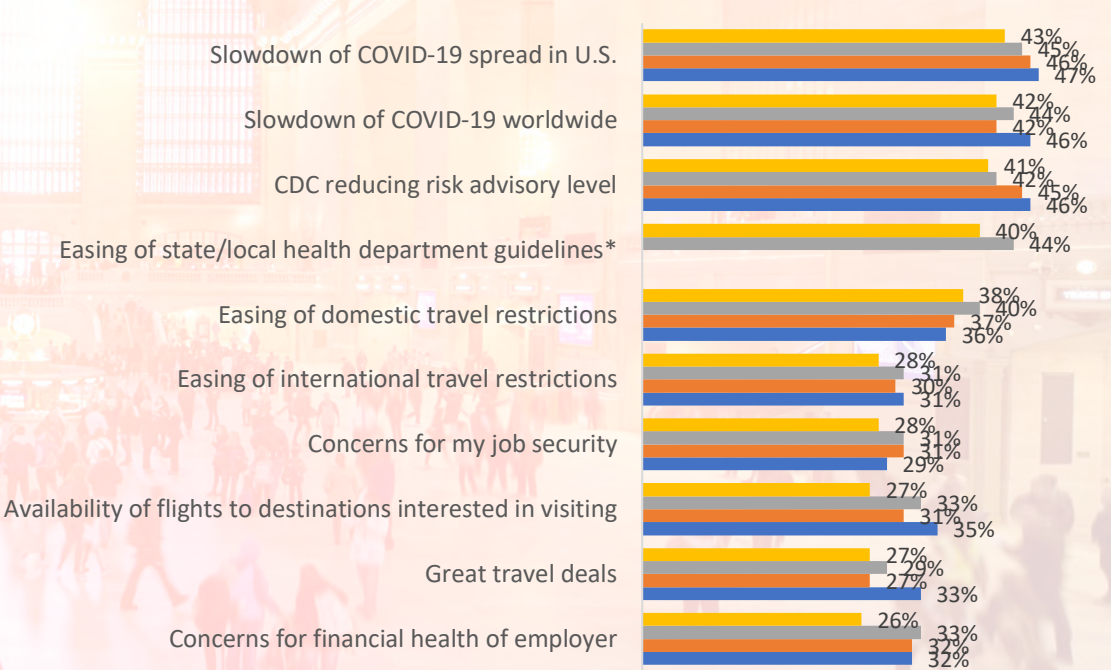
% Top 2 Box among all travelers

*Added 4/24

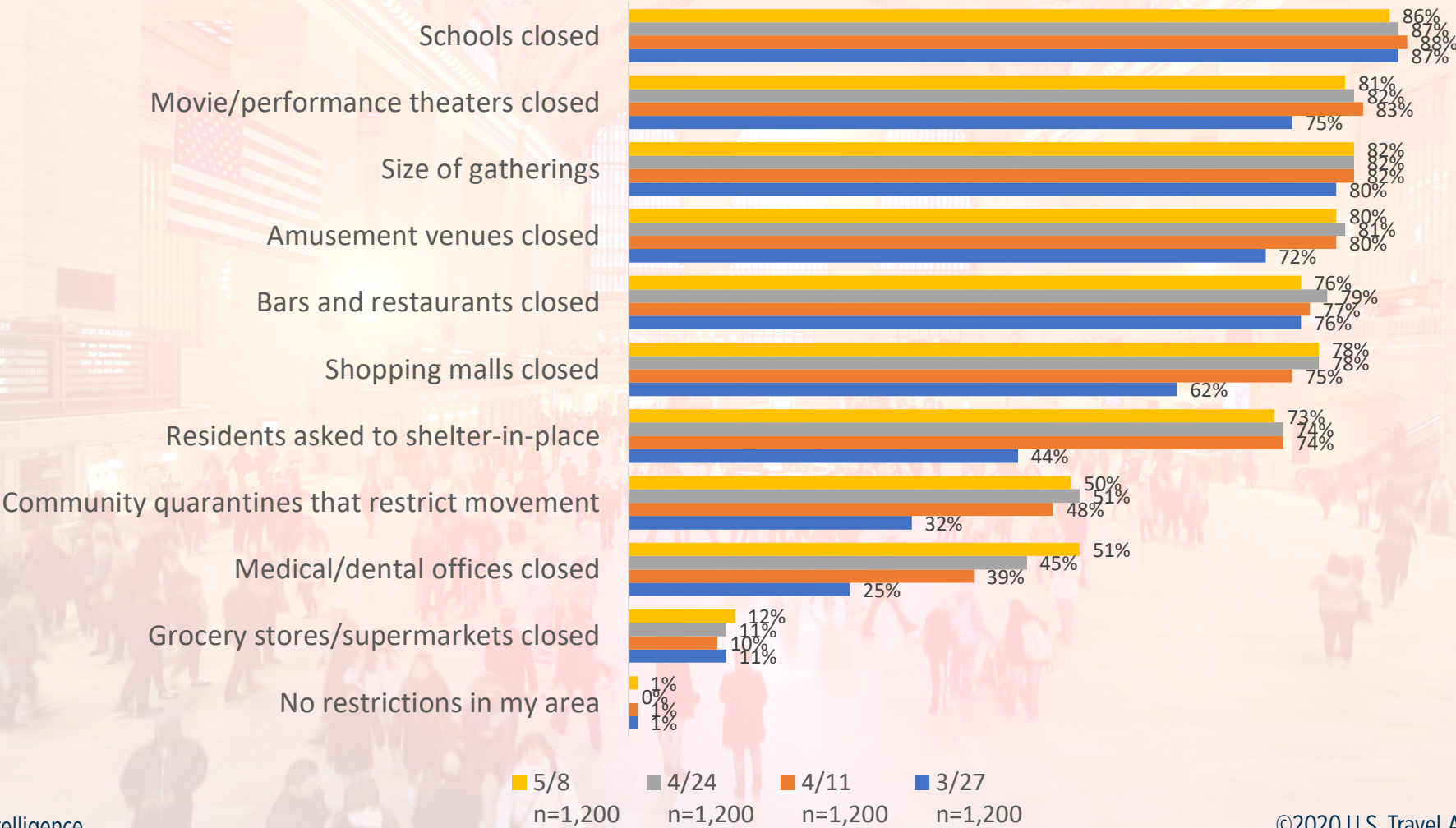
Impact on Taking a Leisure Trip



Impact on Taking a Business Trip



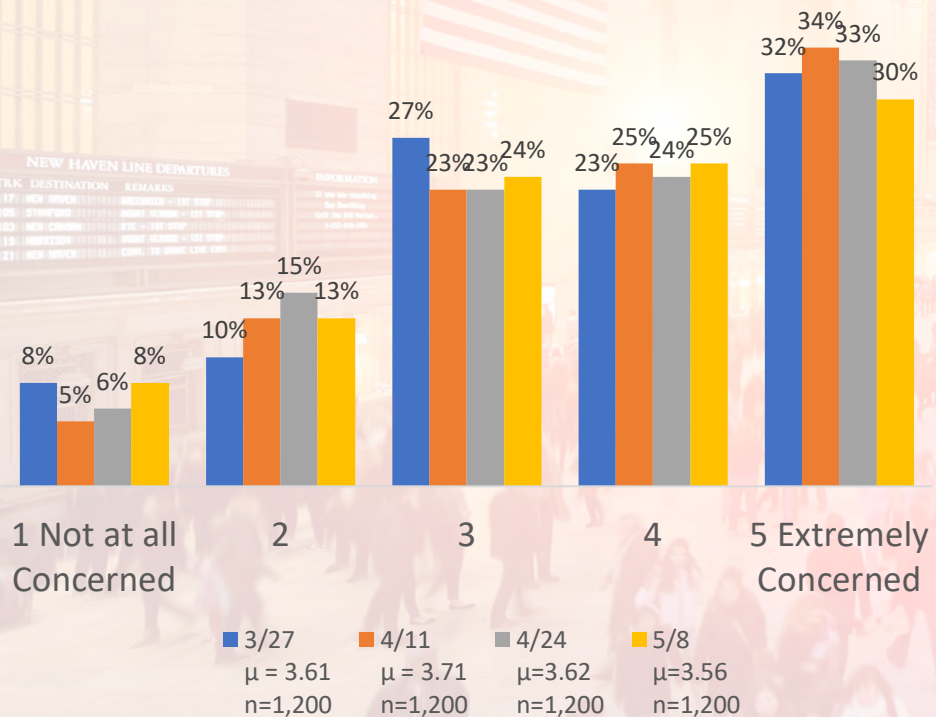
Most Public Venues Remain Closed



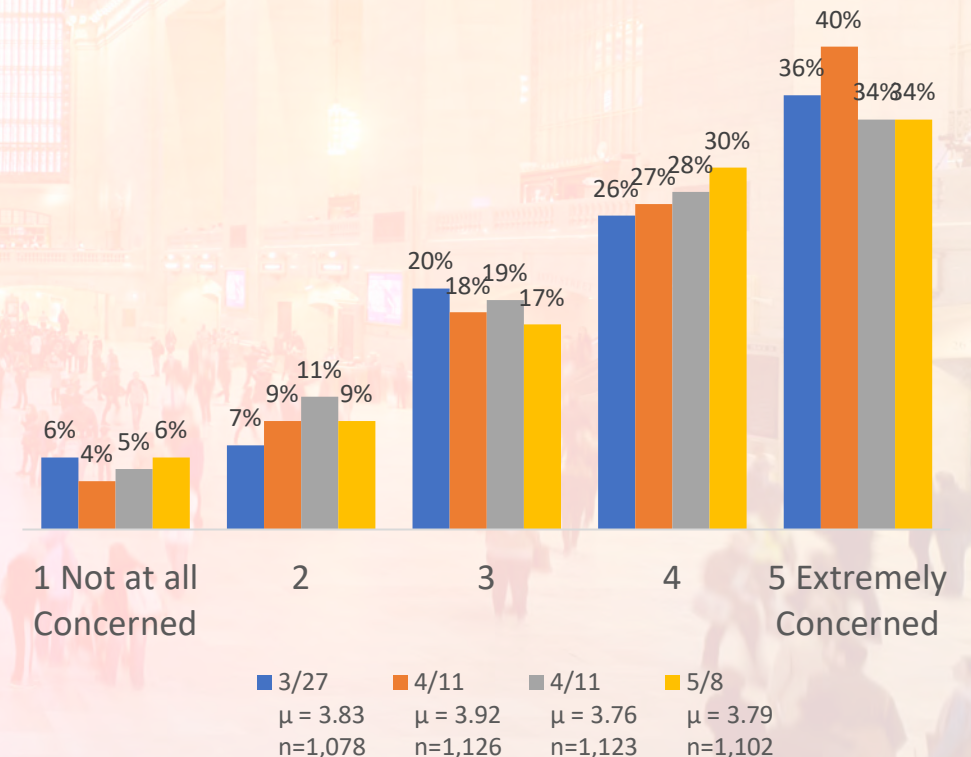
Source: MMGY Travel Intelligence

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

For Myself

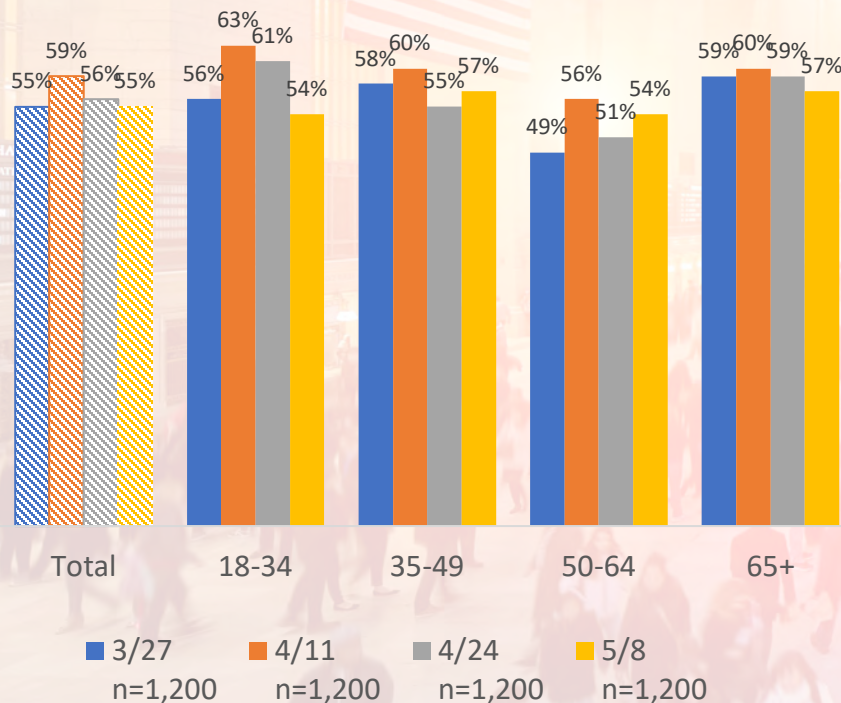


For Others in My Household

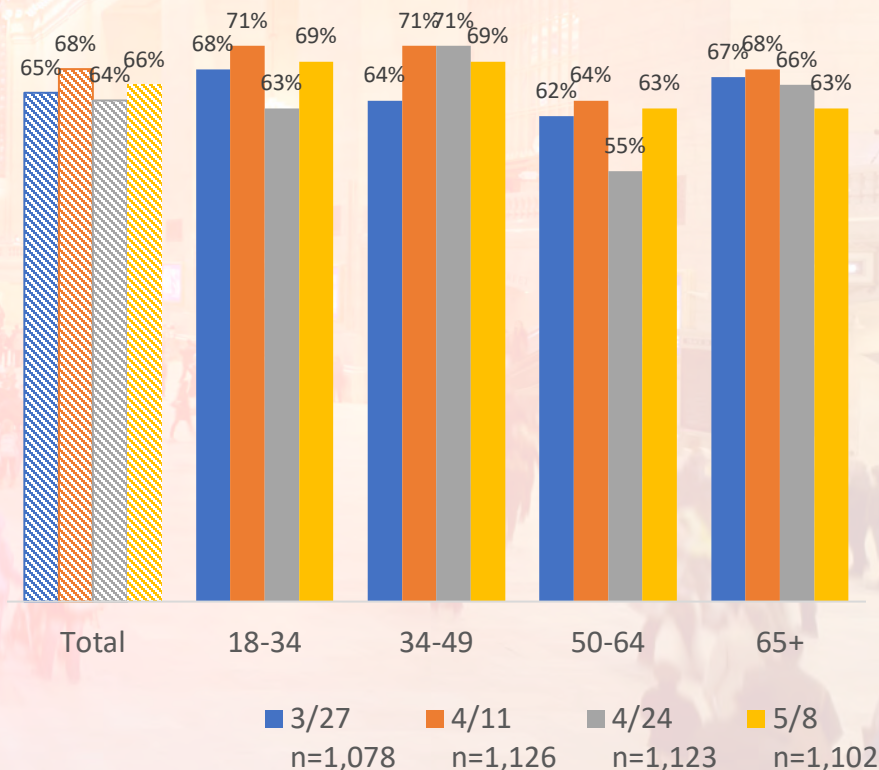


Concern About Contracting COVID-19 Increased Among Some Age Groups As Did Concern for Others in Household

For Myself
by Respondent Age (% Top 2 Box)

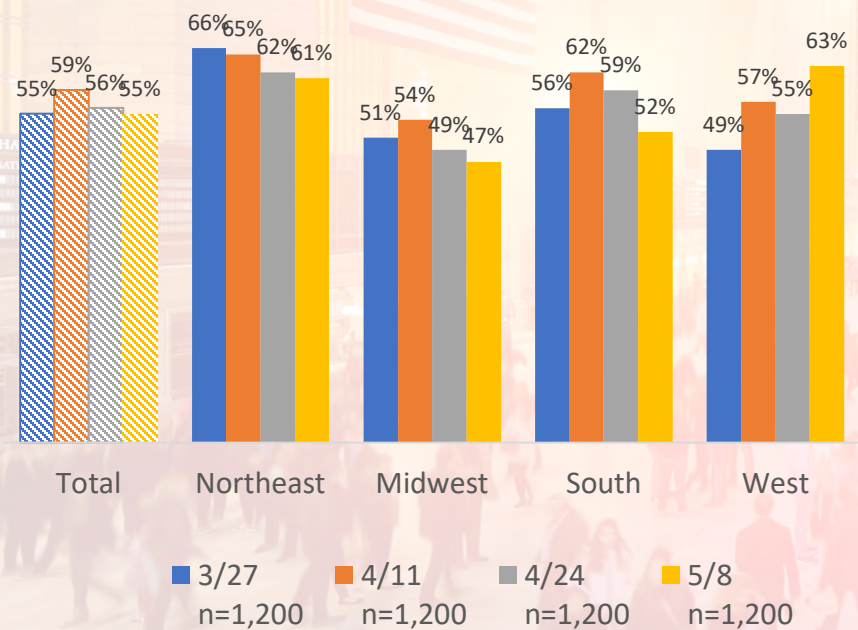


For Others in My Household
by Respondent Age (% Top 2 Box)

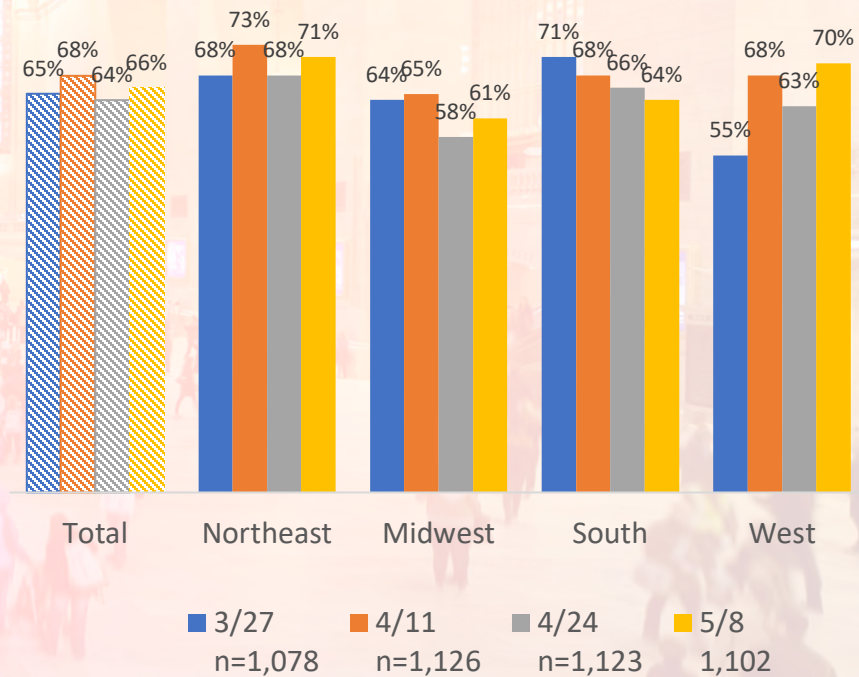


Concern About Contracting COVID-19 Declined Across All Regions Except West, Concern for Others Increased in all Regions except South

For Myself
by Region (% Top 2 Box)

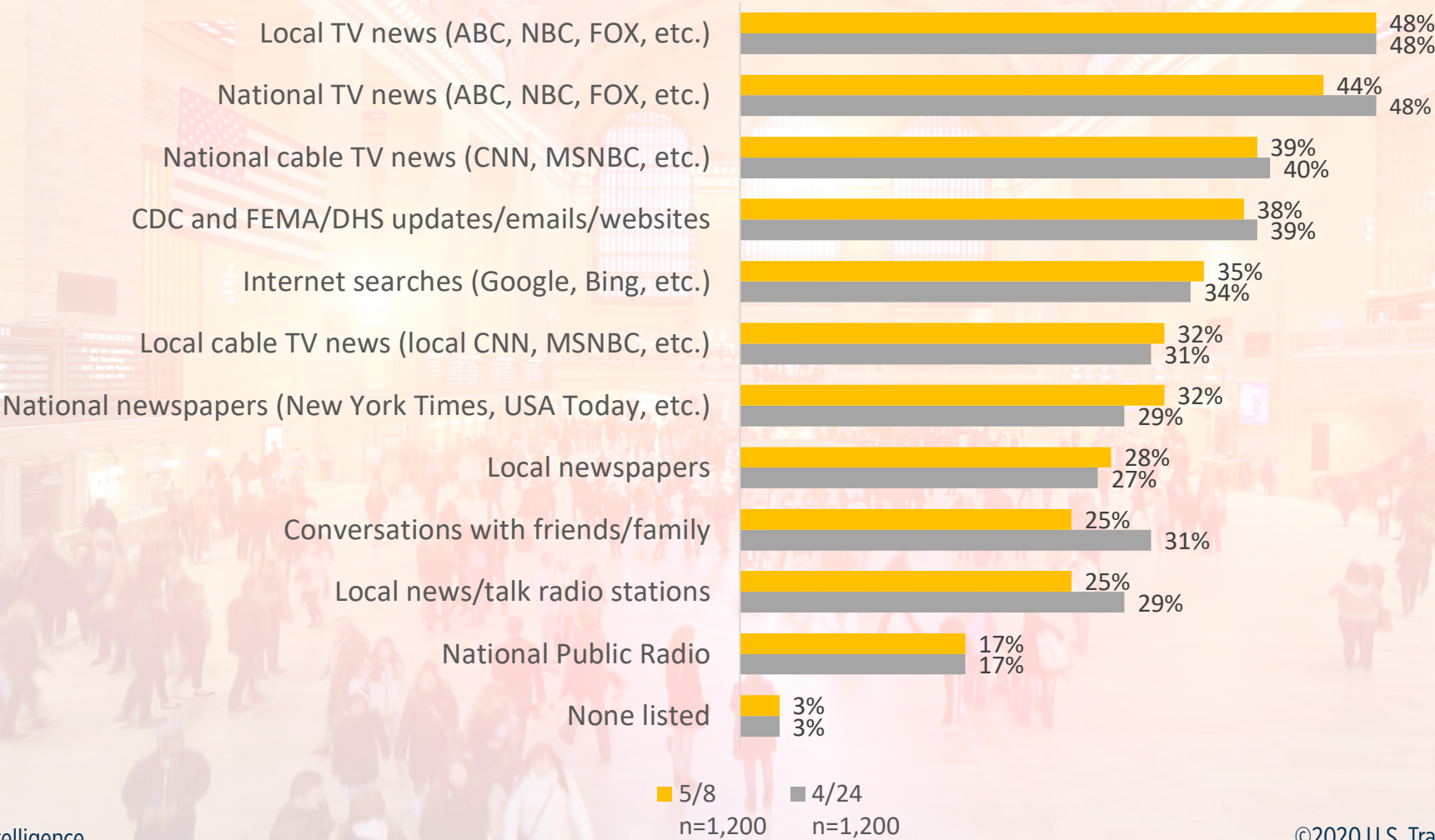


For Others in My Household
by Region (% Top 2 Box)



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

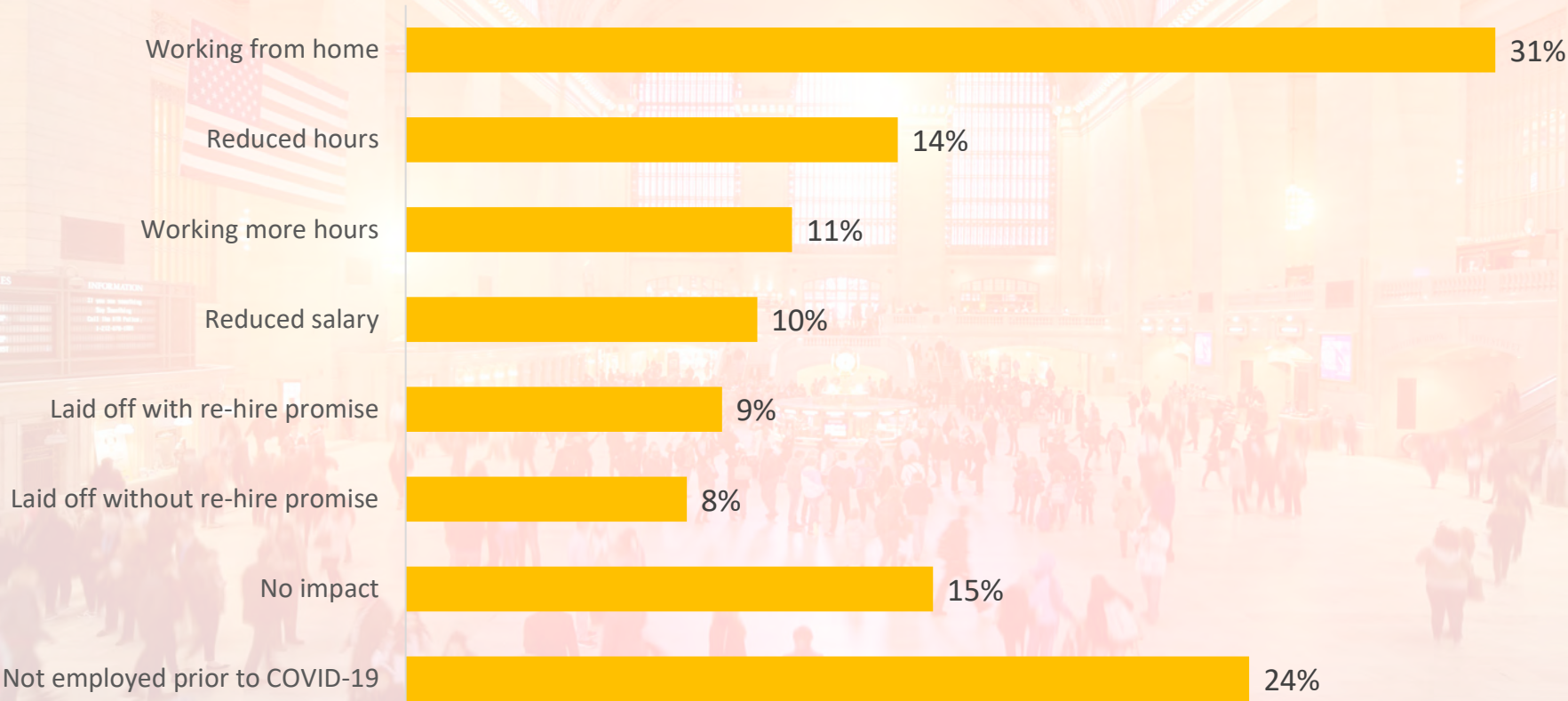
Question Added 4/24



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

Question Added 5/8

Impact of COVID-19 on Employment

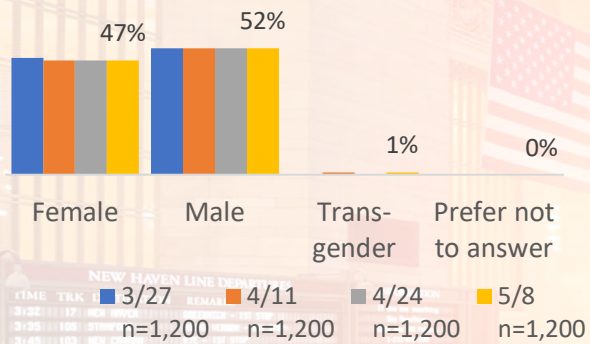


■ 5/8
n=1,200

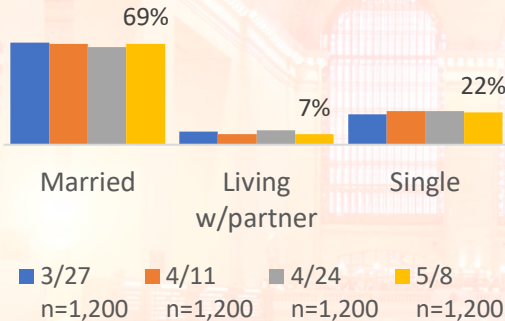
Respondent Demographics

Added 4/24

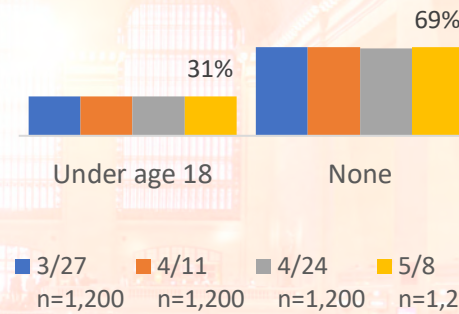
Gender



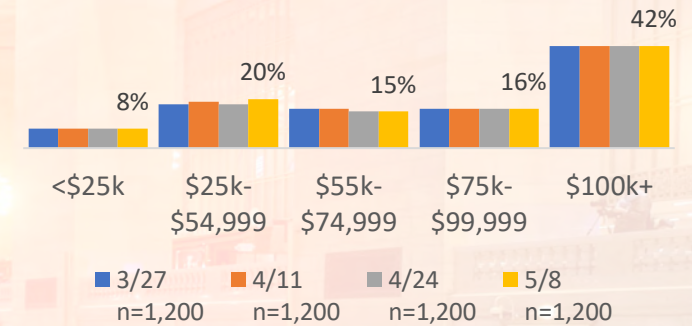
Marital Status



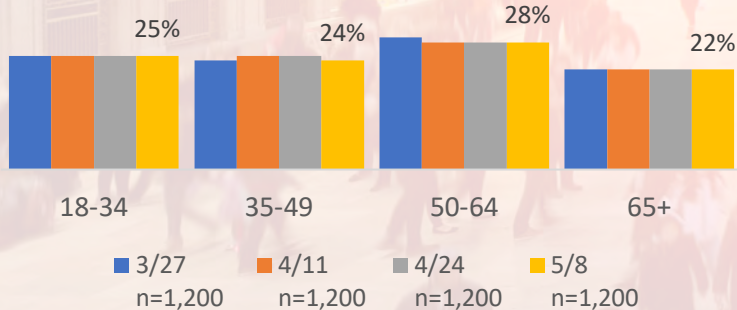
Children in Household



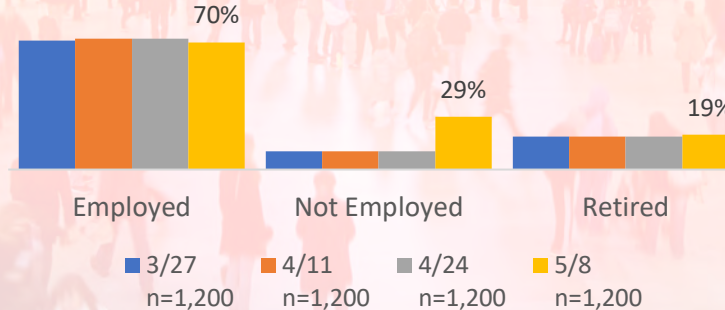
Household Income



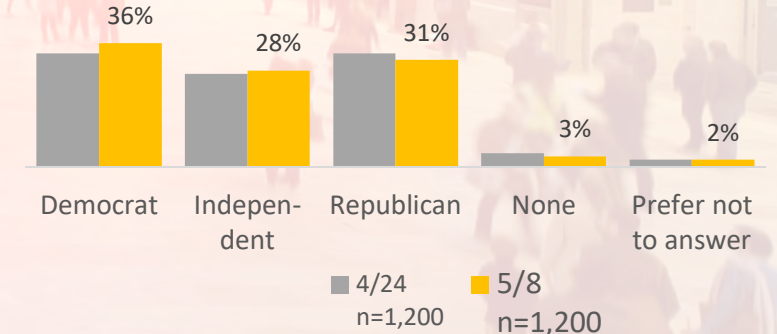
Age



Employment Status



Political Affiliation*





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