OCTOBER 2020 – Wave IX

TRAVEL INTENTIONS PULSE SURVEY (TIPS)

Impact of COVID-19

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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.
Better insights. **SMARTER STRATEGY.**

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 September 21–28, 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’s October report reveals that travelers are feeling safer pursuing many travel-related activities. This suggests a transition from the Fear to the Understanding phase of how they are processing the pandemic psychologically. In turn, this is having a positive effect on most travel intentions during the next six months.

• While half of respondents are still “somewhat” concerned about contracting the virus, the percentage who are “extremely” concerned dropped from 31% to 26%.

• Respondents’ likelihood to take a domestic leisure trip during the next six months reached another high, with 45% (top-two box %) reporting they are at least somewhat likely to do so, up from 41% last month.

• The likelihood of taking an international leisure trip during the next six months also reached a new high, with 25% of respondents now likely to do so, up from 18% last month.

• The likelihood of staying in a hotel/resort or vacation home/condo increased from last month, up 2 and 4 points, respectively.
• One-quarter (23%) of respondents are likely to visit a theme park during the next six months – the highest incidence observed since the survey’s inception in March.

• The likelihood of participating in various entertainment activities during the next six months, including attending an outdoor concert/festival or an outdoor sporting event, increased.

• The availability of a vaccine would have the greatest impact on respondents’ decisions about future travel. Consent to receive the vaccine remains problematic, however: Half of respondents (49%) would wait at least a few months to get it, while 11% state they would not consent to being vaccinated at all.

• Respondents are increasingly receptive to attractive travel deals: 39% report “great travel deals” would influence their decision to travel, up from 33% last month.
IMPACT OF COVID-19 ON TRAVEL PLANS
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)

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Respondents Are More Likely To Have Canceled Planned Business Than Leisure Travel Activities

Trip Type
(among those with plans – Wave IX)

<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>38%</td>
<td>45%</td>
<td>17%</td>
</tr>
<tr>
<td>Group tour package</td>
<td>39%</td>
<td>40%</td>
<td>21%</td>
</tr>
<tr>
<td>Ocean cruise</td>
<td>47%</td>
<td>43%</td>
<td>10%</td>
</tr>
<tr>
<td>Vacation</td>
<td>52%</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>Off-site business meeting</td>
<td>54%</td>
<td>33%</td>
<td>13%</td>
</tr>
<tr>
<td>Conference/convention</td>
<td>63%</td>
<td>26%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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?
The Majority Of Respondents Have Canceled Rather Than Postponed Flight, Car Rental And Lodging Reservations

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

- Domestic flight
  - Canceled: 58%
  - Postponed: 28%
  - Continuing as planned: 14%
  - n=457

- International flight
  - Canceled: 57%
  - Postponed: 32%
  - Continuing as planned: 11%
  - n=309

- Rental car reservation
  - Canceled: 60%
  - Postponed: 23%
  - Continuing as planned: 17%
  - n=242

- Hotel/resort reservation
  - Canceled: 58%
  - Postponed: 29%
  - Continuing as planned: 14%
  - n=439

- Vacation rental home
  - Canceled: 44%
  - Postponed: 37%
  - Continuing as planned: 19%
  - 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)
The Majority Of Respondents Have Canceled Their Planned Participation In Life Music, Theatrical And Sporting Events

Events
(among those with plans – Wave IX)

- **Live music/concert**
  - Canceled Plans: 59%
  - Postponed Plans: 32%
  - Continuing as Planned: 9%
  - N=251

- **Live theatrical performance**
  - Canceled Plans: 51%
  - Postponed Plans: 35%
  - Continuing as Planned: 14%
  - N=203

- **Live sporting event**
  - Canceled Plans: 61%
  - Postponed Plans: 27%
  - Continuing as Planned: 12%
  - N=217

- **Bars/restaurants**
  - Canceled Plans: 43%
  - Postponed Plans: 40%
  - Continuing as Planned: 18%
  - N=443

- **Theme/amusement park**
  - Canceled Plans: 46%
  - Postponed Plans: 36%
  - Continuing as Planned: 17%
  - N=177

- **Celebrations (weddings, reunions, etc.)**
  - Canceled Plans: 44%
  - Postponed Plans: 44%
  - Continuing as Planned: 12%
  - N=249

*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)
Likelihood Of Taking A Domestic Leisure Trip Continues To Rise, While Likelihood Of Taking A Domestic Business Trip Has Declined (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=1,141, Business: n=725)
The % Of Respondents Likely To Take A Domestic Leisure Trip During The Next Six Months Increased From Last Month

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?
The % Of Respondents Likely To Take A Domestic Business Trip During The Next Six Months Remained The Same As Last Month

**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?
Two-Thirds Of Respondents Expect To Take A Leisure Trip During The Next Six Months; 6 Out Of 10 Expect To Take A Business Trip

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

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

Σ = 67%

- 20% Within next 30 days
- 20% Within next 3 months
- 27% Within next 6 months
- 20% Within next 12 months
- 11% More than 12 months from now
- 2% No leisure travel expectation

Σ = 56%

- 13% Within next 30 days
- 18% Within next 3 months
- 25% Within next 6 months
- 22% Within next 12 months
- 13% More than 12 months from now
- 9% No business travel expectation

Question / When do you expect to take your next leisure trip? n=1,136

Question / When do you expect to take your next business trip? n=924

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TRAVEL INTENTIONS
BY CATEGORY
Likelihood Of Taking All Trip Types During Next Six Months Increased

Business and Leisure Trip Type
% Top 2 Box

<table>
<thead>
<tr>
<th>Date</th>
<th>Sample Size</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>n=1,200</td>
<td>26%</td>
<td>15%</td>
<td>22%</td>
<td>13%</td>
</tr>
<tr>
<td>APR 11</td>
<td>n=1,200</td>
<td>21%</td>
<td>21%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>APR 24</td>
<td>n=1,200</td>
<td>21%</td>
<td>21%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>MAY 8</td>
<td>n=1,200</td>
<td>29%</td>
<td>22%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>JUN 9</td>
<td>n=1,494</td>
<td>36%</td>
<td>20%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>JUL 8</td>
<td>n=1,200</td>
<td>39%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>JUL 31</td>
<td>n=1,200</td>
<td>39%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>AUG 31</td>
<td>n=1,200</td>
<td>38%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>SEP 29</td>
<td>n=1,200</td>
<td>41%</td>
<td>25%</td>
<td>25%</td>
<td>25%</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 Flying Both Domestically And Internationally During The Next Six Months Increased

**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?
Two In 5 Travelers Are Willing To Drive 300 Miles Or More (Each Way) For A Vacation During The 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 Hotels, Resorts and Vacation Homes During Next Six Months Increased

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 Participating In Outdoor Travel Activities And Visiting A Theme Park Continues To Rise

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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Intent To Participate In Several Popular Travel Activities During Next Six Months Continues To Rise

**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?

* ***Added 6/9***
Likelihood Of Taking A Cruise During The Next Six Months Continues To Rise

Cruise and Group Tour Trip Type
% Top 2 Box

Ocean cruise*  River cruise*  Take a group tour

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 Off-Site Meeting, Conference Or Convention During Next Six Months Continues To Rise

Business Events
% Top 2 Box

<table>
<thead>
<tr>
<th>Date</th>
<th>March 27</th>
<th>April 11</th>
<th>April 24</th>
<th>May 9</th>
<th>June 9</th>
<th>July 8</th>
<th>July 31</th>
<th>August 31</th>
<th>September 29</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</td>
<td>1,200</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?
COVID-19 CONCERNS AMONG TRAVELERS
The Percentage Of Respondents “Extremely” Concerned About Contracting COVID-19 Decreased

<table>
<thead>
<tr>
<th>Date</th>
<th>Survey N</th>
<th>5 - Extremly concerned</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1 - Not at all concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR 27</td>
<td>n=1,200</td>
<td>8%</td>
<td>13%</td>
<td>15%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>APR 11</td>
<td>n=1,200</td>
<td>10%</td>
<td>15%</td>
<td>15%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>APR 24</td>
<td>n=1,200</td>
<td>23%</td>
<td>24%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>MAY 8</td>
<td>n=1,494</td>
<td>23%</td>
<td>25%</td>
<td>26%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>JUN 9</td>
<td>n=1,104</td>
<td>23%</td>
<td>23%</td>
<td>29%</td>
<td>31%</td>
<td>31%</td>
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<tr>
<td>JUL 8</td>
<td>n=1,200</td>
<td>23%</td>
<td>23%</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>JUL 31</td>
<td>n=1,200</td>
<td>23%</td>
<td>24%</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>AUG 31</td>
<td>n=1,200</td>
<td>27%</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>SEP 29</td>
<td>n=1,200</td>
<td>27%</td>
<td>23%</td>
<td>23%</td>
<td>27%</td>
<td>27%</td>
</tr>
</tbody>
</table>

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)?
The Percentage Of Respondents “Extremely” Concerned About Household Members Contracting COVID-19 Decreased

<table>
<thead>
<tr>
<th>Date</th>
<th>n</th>
<th>1 - Not at all concerned</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Extremely concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR 27</td>
<td>1,078</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>APR 11</td>
<td>1,126</td>
<td>4%</td>
<td>9%</td>
<td>17%</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>APR 24</td>
<td>1,123</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>17%</td>
<td>34%</td>
</tr>
<tr>
<td>MAY 8</td>
<td>1,102</td>
<td>6%</td>
<td>9%</td>
<td>12%</td>
<td>28%</td>
<td>34%</td>
</tr>
<tr>
<td>JUN 9</td>
<td>1,343</td>
<td>8%</td>
<td>12%</td>
<td>18%</td>
<td>32%</td>
<td>30%</td>
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<tr>
<td>JUL 8</td>
<td>1,200</td>
<td>6%</td>
<td>7%</td>
<td>18%</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>JUL 31</td>
<td>1,200</td>
<td>7%</td>
<td>9%</td>
<td>18%</td>
<td>28%</td>
<td>34%</td>
</tr>
<tr>
<td>AUG 31</td>
<td>1,200</td>
<td>8%</td>
<td>11%</td>
<td>18%</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td>SEP 29</td>
<td>1,200</td>
<td>7%</td>
<td>12%</td>
<td>18%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>

**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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The Availability Of a Vaccine Is Now The Most Influential Factor Affecting Future Travel Decisions

**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?
The Majority Of Respondents Would Either Wait Or Decline To Receive A Vaccine When One Becomes Available

- 49% said they would get the vaccine as soon as it is available.
- 40% said they would wait at least a few months to see if it is effective.
- 11% said they would not get the vaccine.

**Question**: Which of the following best describes your plan for if/when a vaccine becomes available?
THE IMPACT OF COVID-19
While Restrictions Have Been Reduced In Many States, Numerous Travel Economy Businesses Remain Closed

<table>
<thead>
<tr>
<th>Business Type</th>
<th>Never Imposed</th>
<th>Was Imposed, Now Lifted</th>
<th>Imposed Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery stores/supermarkets closed</td>
<td>59%</td>
<td>28%</td>
<td>13%</td>
</tr>
<tr>
<td>Movie/performance theaters closed</td>
<td>5%</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Size of gatherings</td>
<td>5%</td>
<td>32%</td>
<td>64%</td>
</tr>
<tr>
<td>Amusement venues closed</td>
<td>6%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>Bars and restaurants closed</td>
<td>6%</td>
<td>74%</td>
<td>20%</td>
</tr>
<tr>
<td>Shopping malls closed</td>
<td>9%</td>
<td>72%</td>
<td>19%</td>
</tr>
<tr>
<td>Residents asked to shelter-in-place</td>
<td>13%</td>
<td>66%</td>
<td>21%</td>
</tr>
<tr>
<td>Community quarantines that restrict movement</td>
<td>23%</td>
<td>54%</td>
<td>23%</td>
</tr>
<tr>
<td>Medical/dental offices closed</td>
<td>22%</td>
<td>64%</td>
<td>14%</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 Substantial Impact On The Work Habits Or Employment Status Of The Majority Of Respondents

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working from home</td>
<td>24%</td>
</tr>
<tr>
<td>Reduced hours</td>
<td>12%</td>
</tr>
<tr>
<td>Reduced salary</td>
<td>11%</td>
</tr>
<tr>
<td>Working more hours</td>
<td>10%</td>
</tr>
<tr>
<td>Laid off with rehire promise</td>
<td>6%</td>
</tr>
<tr>
<td>Laid off without rehire promise</td>
<td>8%</td>
</tr>
<tr>
<td>No impact</td>
<td>30%</td>
</tr>
<tr>
<td>Not employed prior to COVID-19</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

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SOURCES OF INFORMATION
CDC Communications, National and Local Broadcast TV News Are Most Trusted Sources For News About COVID-19

- CDC and FEMA/DHS updates/emails/websites: 37%
- National broadcast television news (ABC, NBC, FOX, etc.): 34%
- Local broadcast television news (ABC, CBS, FOX, etc.): 34%
- National cable television news (CNN, MSNBC, etc.): 31%
- National newspapers (The New York Times, USA Today, etc.): 30%
- Your local newspaper: 22%
- Internet searches (Google, Bing, etc.): 20%
- National Public Radio: 19%
- Conversations with friends and family: 19%
- Local news/talk radio stations: 17%
- 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)

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DEMOGRAPHICS