Travel Sentiment Survey

Results Report

Wave 2: 4/14/20-4/17/20

Study Overview

Our Approach

Ongoing representative study of U.S. travelers to understand how the present-state of COVID-19 is impacting their desires and decisions around travel.

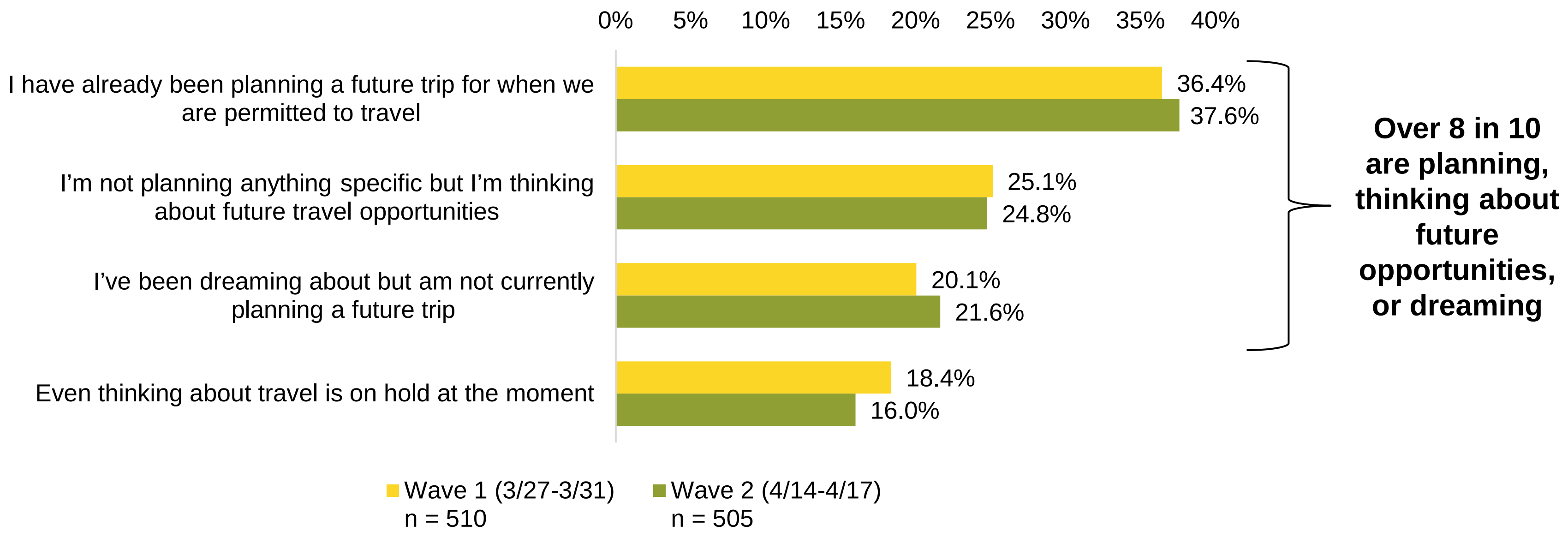
+ This study was conducted as an online survey.
+ Sample was sourced via Amazon Mechanical Turk, the largest global crowdsourcing platform for social science research.
+ Respondents were screened to fit the following criteria:
    + Age 18+
    + Have taken a leisure trip outside of the state they live in with at least one overnight stay within the past 2 years
+ Best efforts were made to obtain a demographically representative sample.
+ Data were weighted by age, gender, and income to match U.S. travelers who are 18 years or older.
+ Data were collected between March 27th, 2020 and March 31st, 2020 for Wave 1 and April 14th, 2020 and April 17th, 2020 for Wave 2.
+ A total of 510 individuals in Wave 1 and a total of 505 individuals in Wave 2 completed the survey.

Summary of Key Findings

Summary of key findings

- **Travel is still actively on consumers' minds:** 8 in 10 are either still either planning a future trip, thinking about future travel opportunities, or travel dreaming.
- **But there was a decline in traveler confidence in the safety of U.S. travel**, with about half now saying they expect travel to be safe post-pandemic, compared to just over 6 in 10 in the previous wave.
- **Correspondingly, it appears there will be a lag between when the government lifts U.S. travel restrictions and when travelers begin traveling again**. In fact, consumers are now saying it will take more time for them to return to normal travel behaviors than reported in the previous wave.
- **Travelers seek information from the government first to determine when and where it will be safe to travel**. They care more about 1) that the government has removed travel restrictions and 2) that the number of COVID-19 cases and/or deaths in the U.S. has declined overall. **These factors matter more than personal finances or health.**
- **Post-pandemic, travelers will be most interested in less populated vacations,** such as road trips, beach trips, outdoor adventures, small town getaways, and remote or rural destinations. **Family getaways are looked forward to less in wave two.**

Travel mindset has remained steady: the majority of U.S. travelers are still either planning a future trip, thinking about future travel opportunities, or travel dreaming.



Wave 2 (4/14-4/17)

Travelers are getting more cautious. There was a decline in traveler's confidence in the safety of U.S. travel after the pandemic is over.

Travelers Who Expect It to Be Safe

62% vs. **51%**

Wave 1 (3/27-3/31)

Wave 2 (4/14-4/17)

Wave 1 (3/27-3/31); Wave 2 (4/14-4/17)

There was a decline in the proportion of travelers who say they will get back to normal travel behaviors fairly quickly and an increase in those who say it will take more time for them to resume travel behaviors.

Returning to Travel Behaviors
Within a Few Weeks or Less

46% vs. **39%**

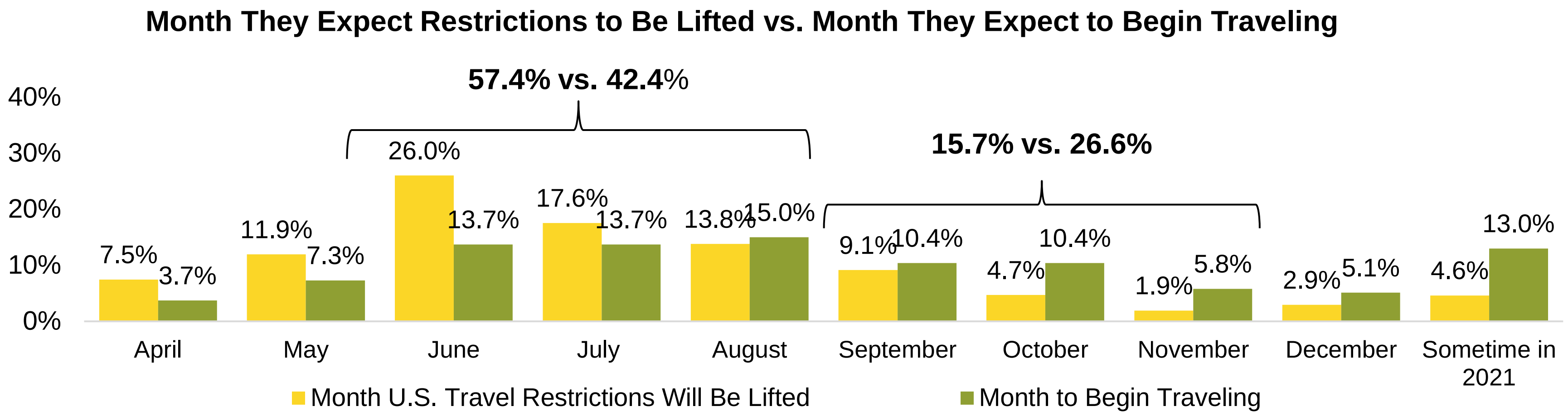
Wave 1 (3/27-3/31) — Wave 2 (4/14-4/17)

Returning to Travel Behaviors
After A Few Months or More

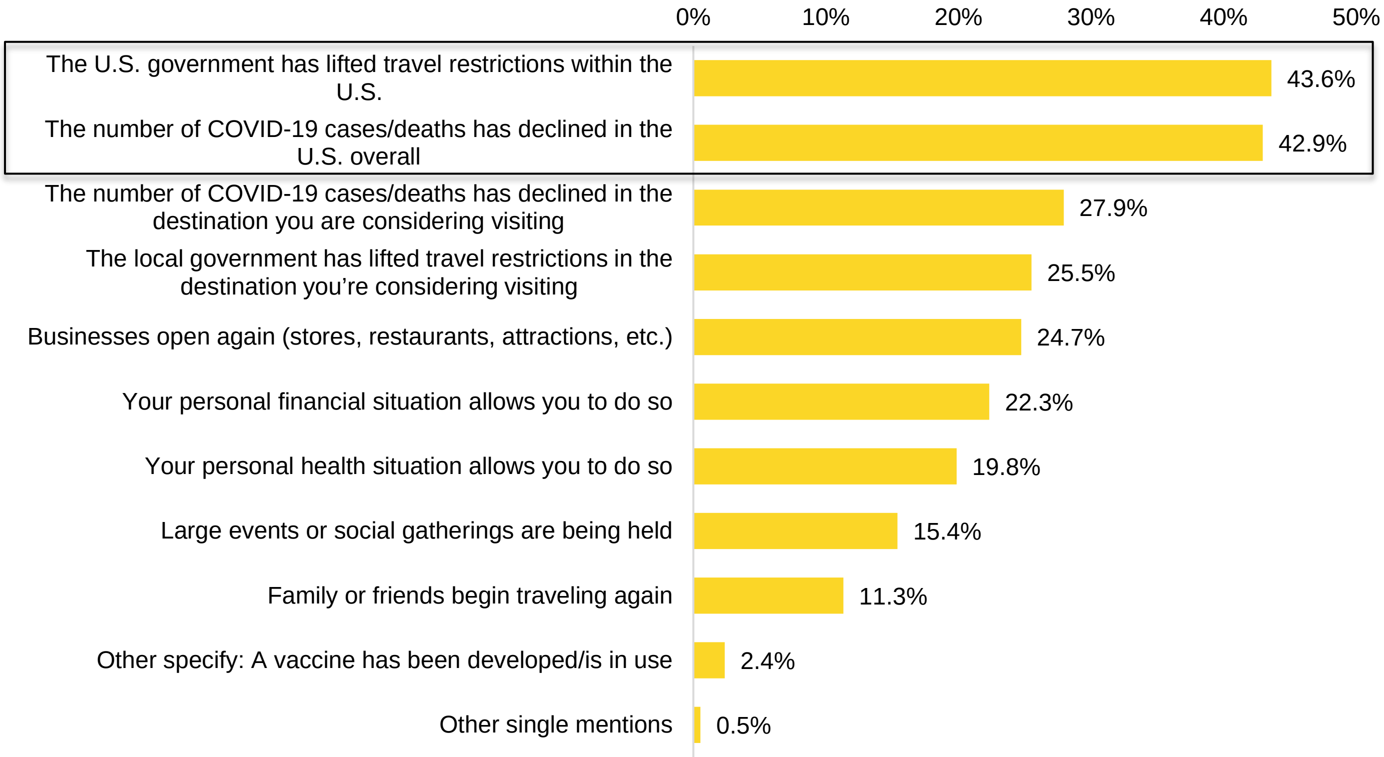
34% vs. **44%**

Wave 1 (3/27-3/31) — Wave 2 (4/14-4/17)

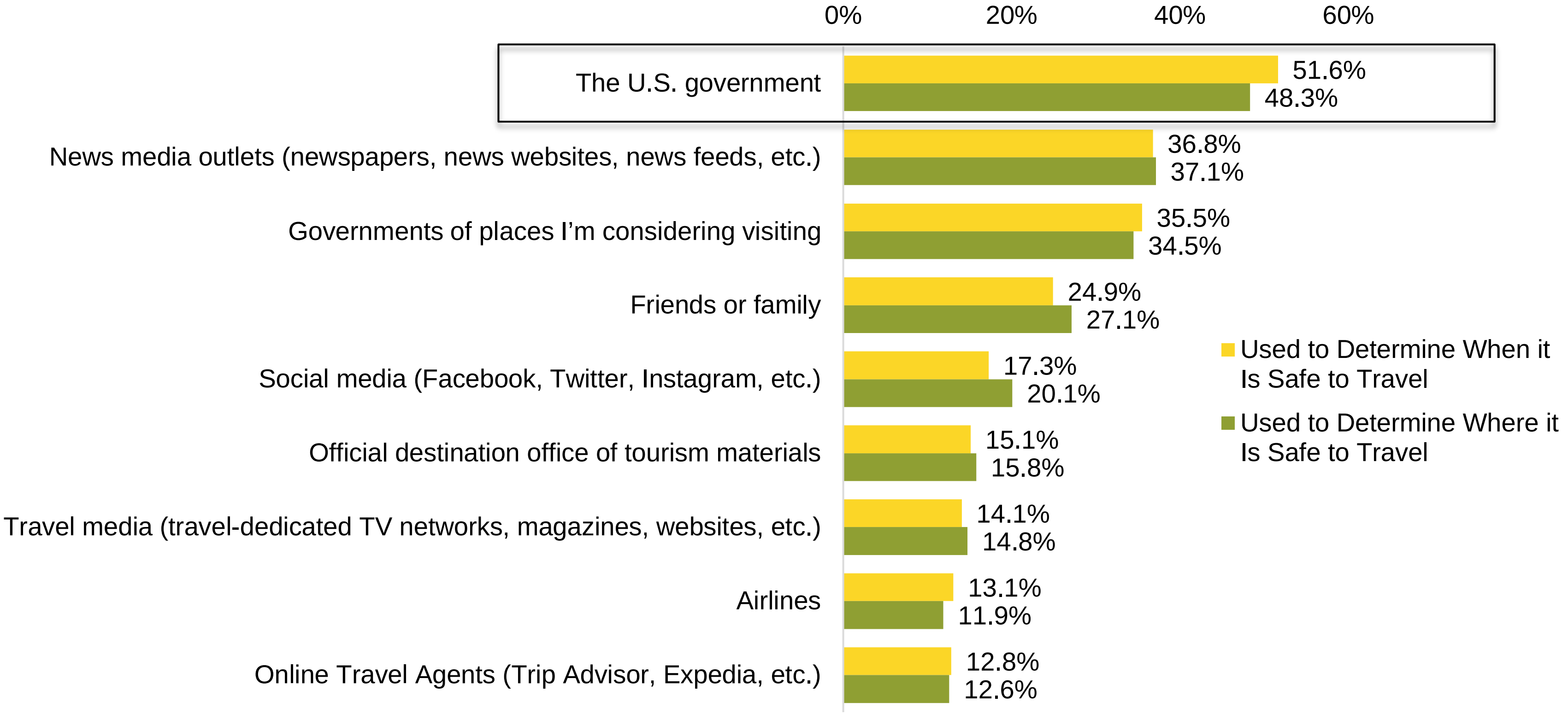
While nearly 6 in 10 travelers expect U.S. travel restrictions to be lifted this summer, only just over 4 in 10 say they will begin traveling again during the summer.



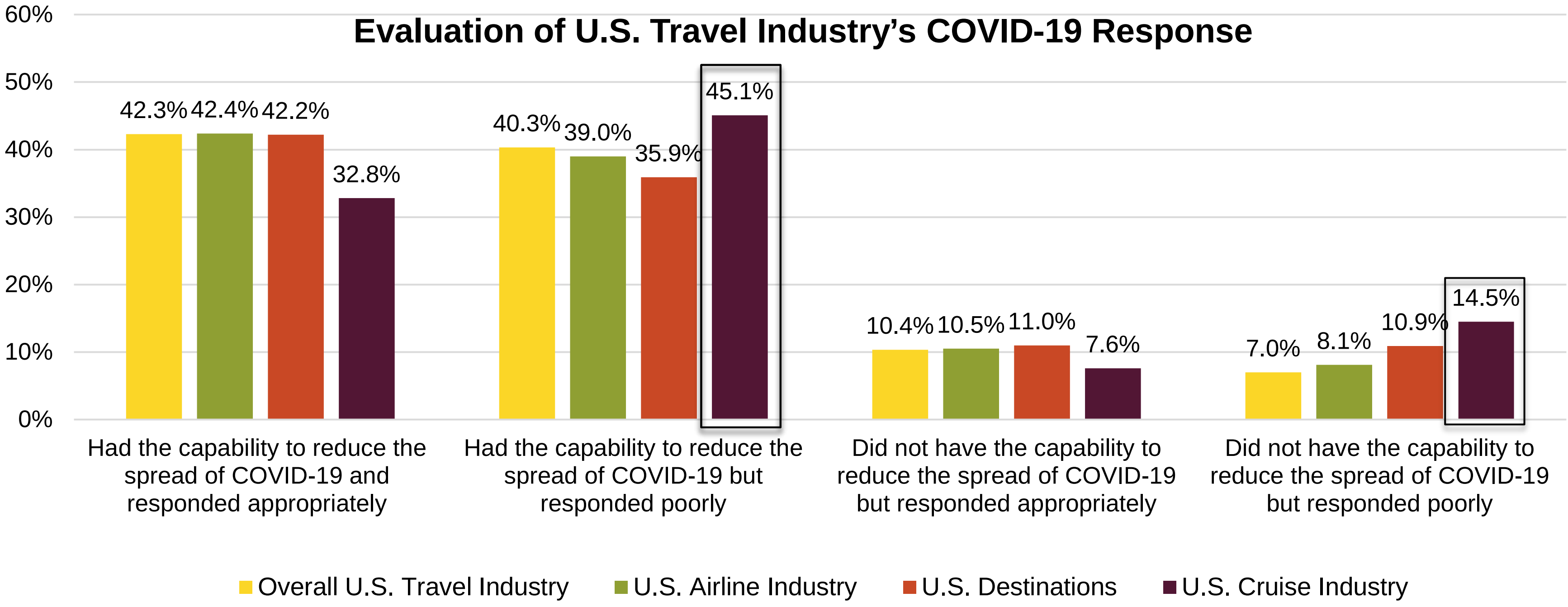
The top indicators that will be most influential in determining when it is safe are government restrictions and # causes/death. These are more influential than personal health or finances.



The most trusted sources used to determine *when* it is safe to travel and *where* it is safe to travel are effectively identical, with the U.S. government being the most trusted source for both.

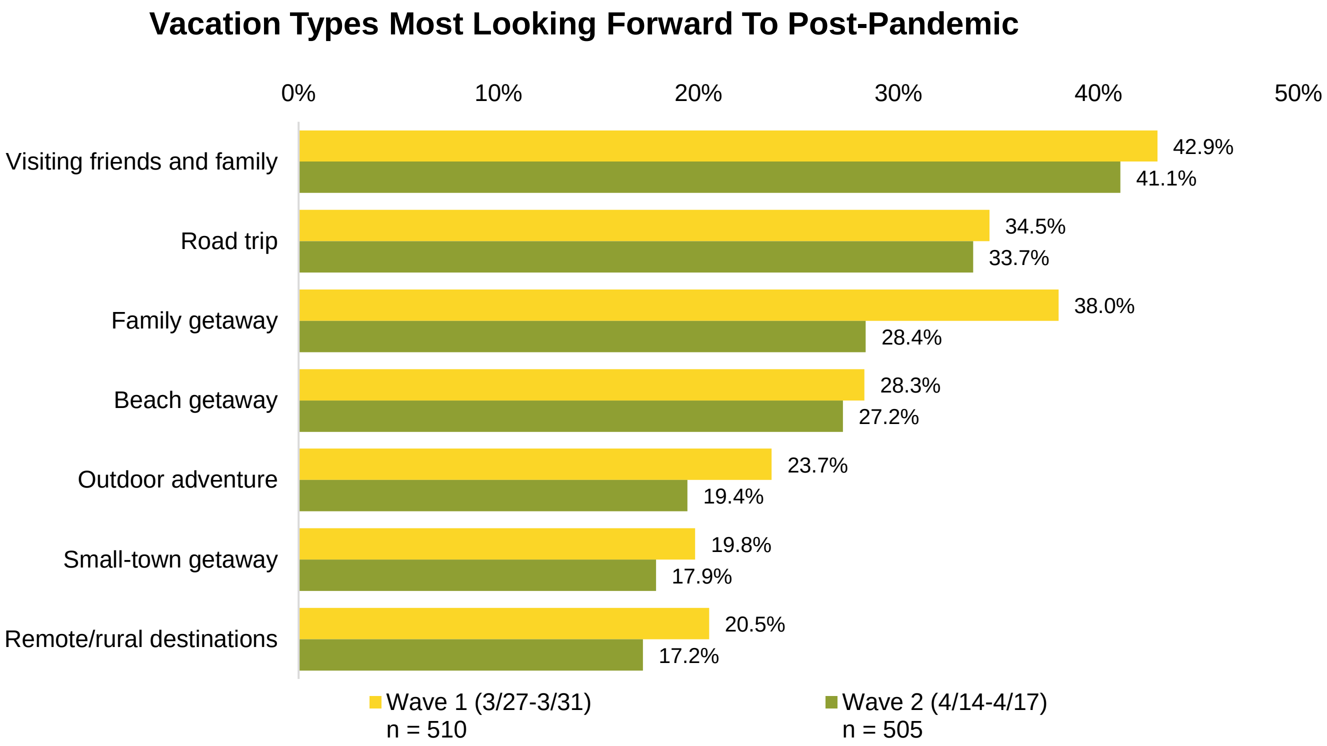


While U.S. travelers are fairly split on whether various entities within the travel industry responded appropriately to COVID-19 or not, they are most critical of the cruise industry's response.



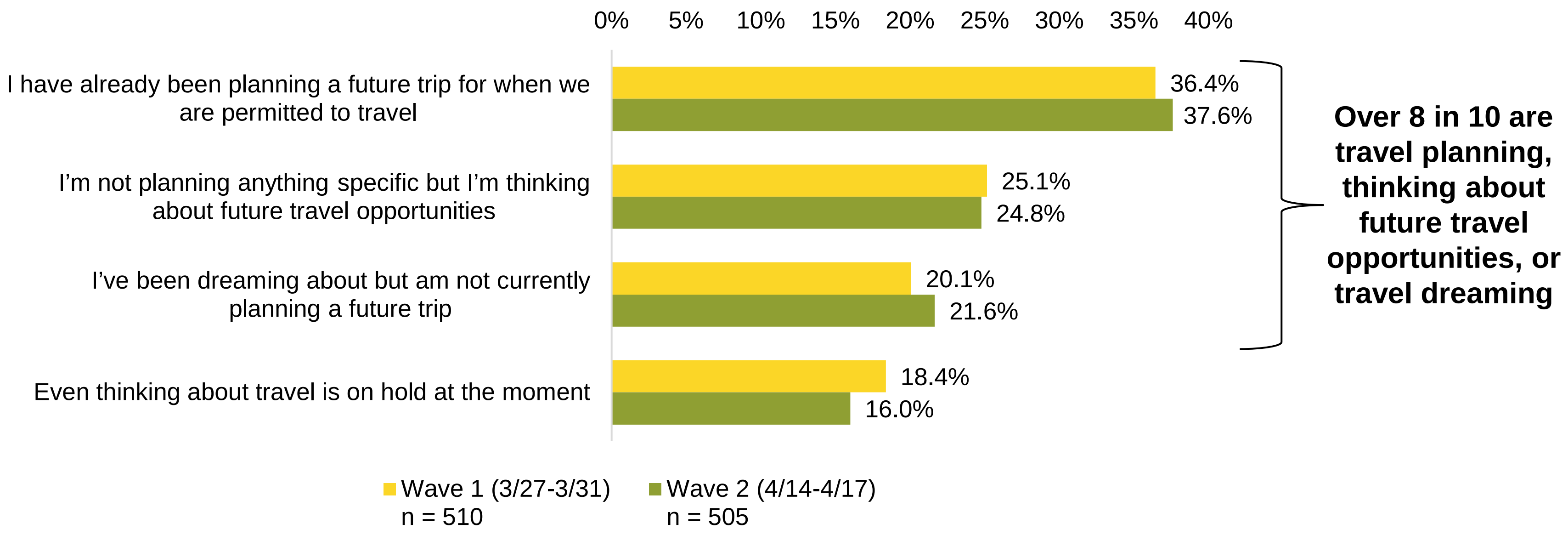
Wave 1 (3/27-3/31); Wave 2 (4/14-4/17)

Travelers are most interested in less populated vacations: road trips, beach trips, outdoor adventures, small town getaways, and remote or rural destinations. Family getaways are looked forward to less in wave 2.



Detailed Findings

U.S. travelers' mindset has stayed consistent wave-over-wave, with over 8 in 10 (84%) either currently planning a trip, thinking about future travel opportunities, or travel dreaming.



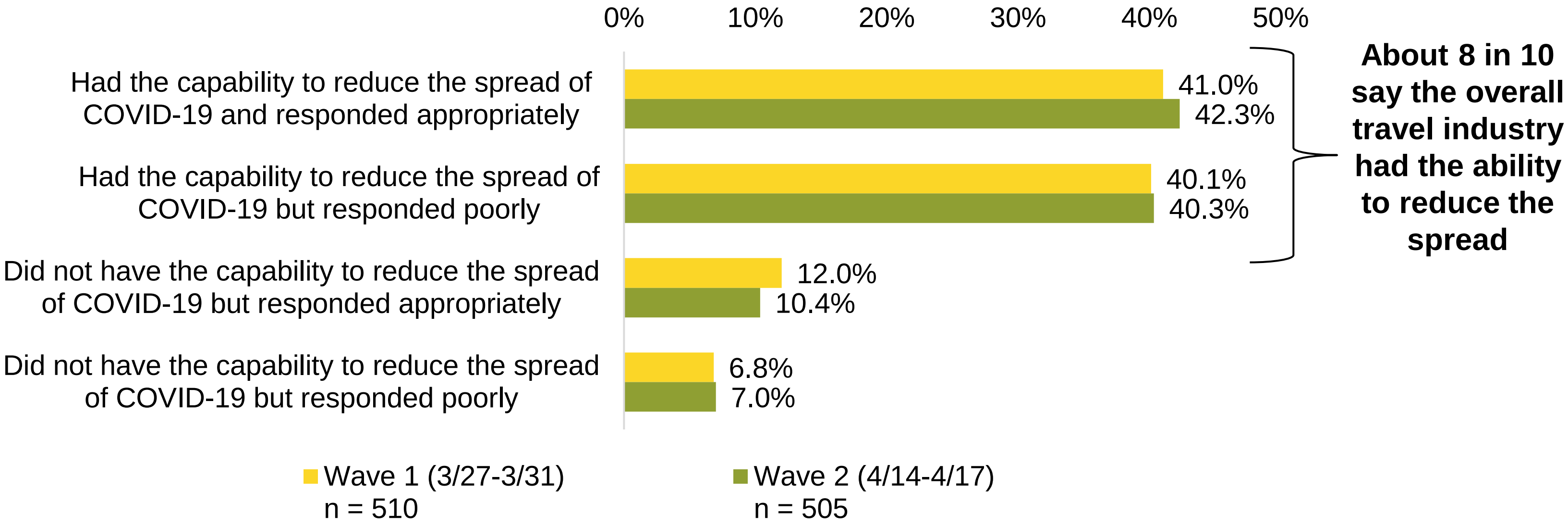
BVK Q7. Travel has been on hold during the COVID-19 pandemic but which of the following represents your current thinking about future leisure travel?

U.S. travelers' attitudes towards travel advertising during the pandemic have remained consistent wave-over-wave, with many travelers desiring to see communications.

Top 2 Box: Agree Strongly or Somewhat	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Right now, I only want to see travel advertising that is addressing their response to the COVID-19 pandemic	52.4%	52.7%
Since travel is restricted, I feel it is insensitive for travel companies and destinations to advertise	47.7%	48.9%
Even now, I like to see advertising for vacation destinations	42.4%	43.1%

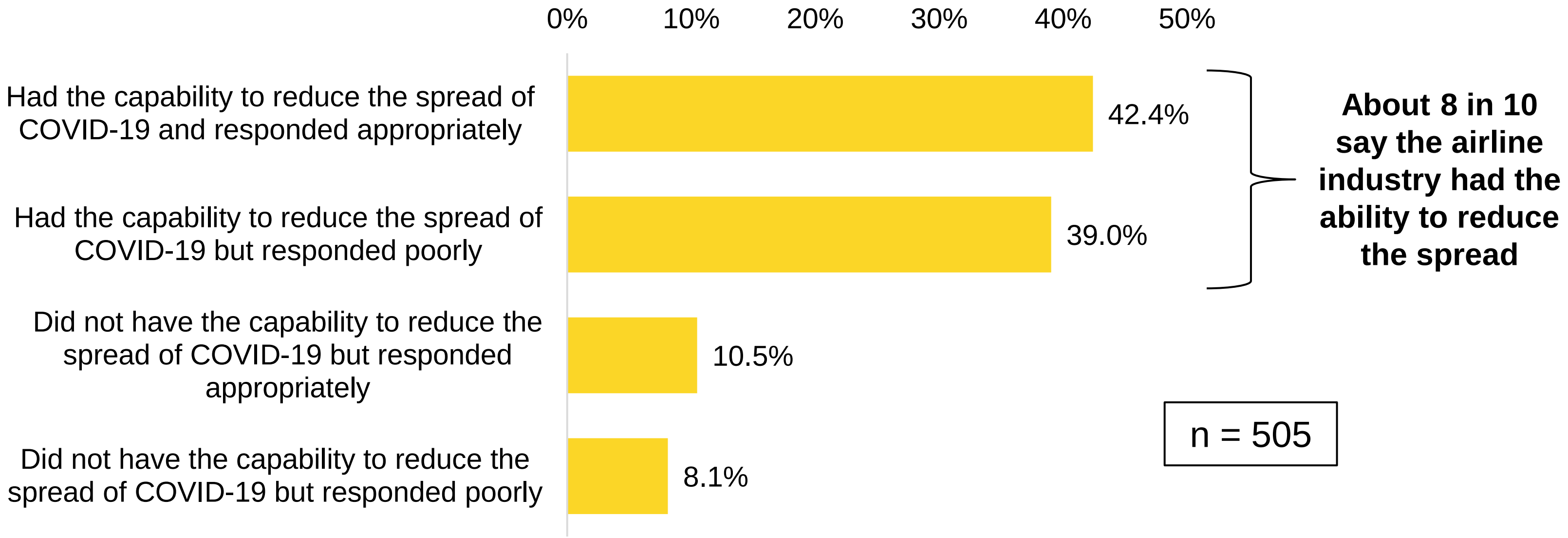
BVK Q5. Indicate how much you agree or disagree with the following statements about the travel industry in the current climate.

Travelers still believe in wave 2 that the industry had the ability to reduce the spread and are still split on whether the industry responded appropriately or not.



BVK Q6. How did the U.S. travel industry respond to the spread of COVID-19? The U.S. travel industry…

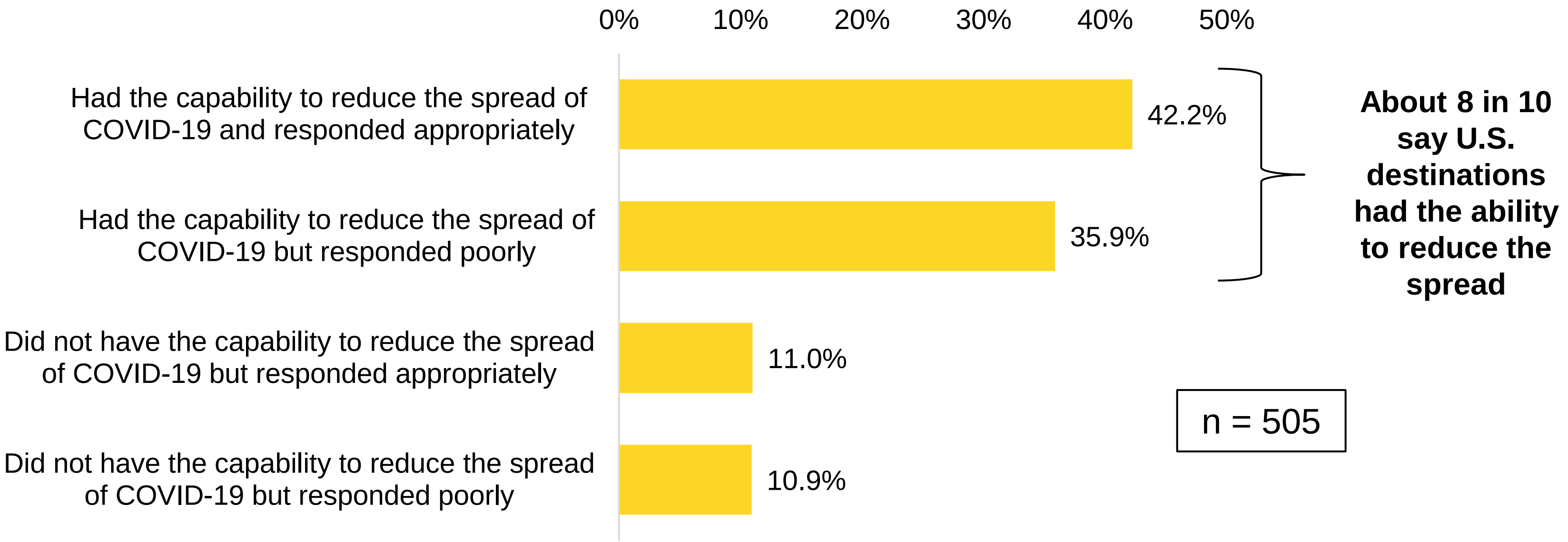
While the majority of U.S. travelers believe that the airline industry had the ability to reduce the spread of COVID-19, they are split on their evaluation of the industry's response.



n = 505

Q6b How did the U.S. airline industry respond to the spread of COVID-19? The U.S. airline industry…
Question introduced in Wave 2 (4/14-4/17)

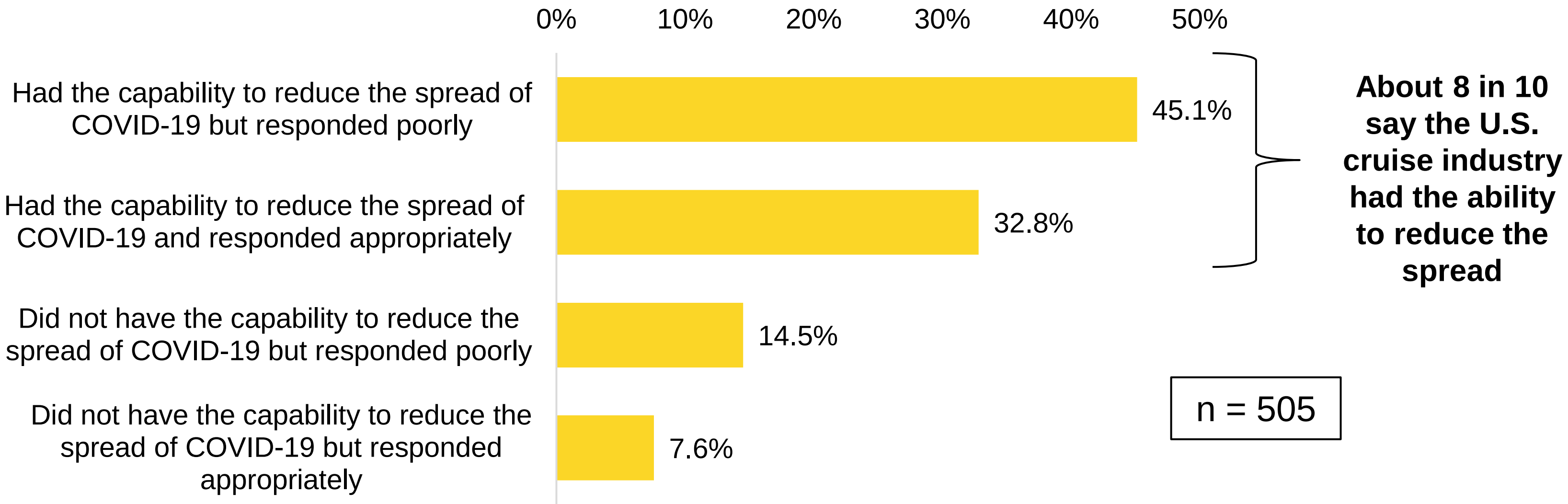
The majority of U.S. travelers believe that U.S. destinations had the ability to reduce the spread of COVID-19 and 4 in 10 (42%) saying destinations responded appropriately.



Q6c. Overall, how did U.S. destinations respond to the spread of COVID-19? U.S. destinations…

Question introduced in Wave 2 (4/14-4/17)

The majority of U.S. travelers believe that the U.S. cruise industry had the ability to reduce the spread of COVID-19, and they are most likely to say that the industry responded poorly.



n = 505

Q6d. How did the U.S. cruise industry respond to the spread of COVID-19? The U.S. cruise industry…
Question introduced in Wave 2 (4/14-4/17)

U.S. travelers' perceptions of the future safety of travel have declined wave-over-wave.

	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Top 3 Box	**62.3% B**	50.6%
Top 2 Box	**38.1% B**	28.1%
Extremely Safe	**10.8% B**	6.6%
Safe	**27.2% B**	21.6%
Somewhat safe	24.3%	22.4%
Neutral	14.1%	17.2%
Bottom 3 Box	23.5%	**32.3% A**
Bottom 2 Box	12.1%	**16.5% A**
Somewhat unsafe	11.4%	15.7%
Unsafe	8.0%	10.8%
Extremely unsafe	4.1%	5.7%

Q8. Thinking ahead, once the COVID-19 pandemic is over and the travel restrictions are lifted, how safe do you expect travel to be in the U.S.?

U.S. travelers' concern for safety on public transportation has increased wave-over-wave, with just over half of travelers (55%) now ranking it within their top two concerns.

Ranked #1 or #2	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Safety on public transportation like airplanes and airports, trains and train-depots, buses and bus stations, and boats and harbors/piers	44.4%	54.9% A
Spreadability of COVID-19 among large groups of people	45.0%	46.9%
Cleanliness of public areas	32.9%	28.5%
Impact of COVID-19 in the major tourist cities	30.5%	28.2%
Impact of COVID-19 in other foreign countries	23.8%	19.5%
Spread of COVID-19 by foreign groups of people	23.5%	21.9%

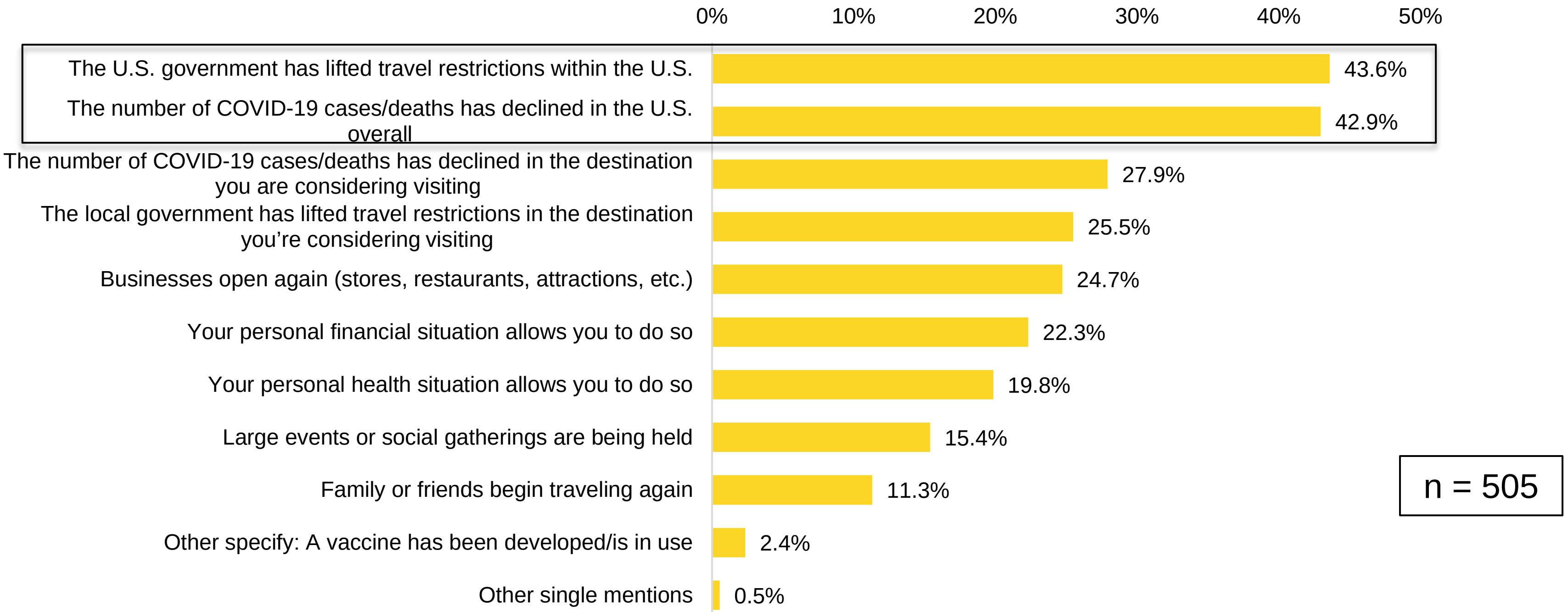
Q10. Thinking specifically about the time immediately following the pandemic, what concerns about COVID-19 do you think will impact people's decisions to travel? (Please click and drag to rank the listed selections below, where 1 = most concerning and 6 = least concerning)

Travel by car continues to be perceived as the safest mode of transportation.

Ranked #1 or #2	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Car	76.9%	78.0%
Plane	41.0%	43.8%
Train	38.1%	38.6%
Bus	28.7% B	22.2%
Cruise	15.4%	17.3%

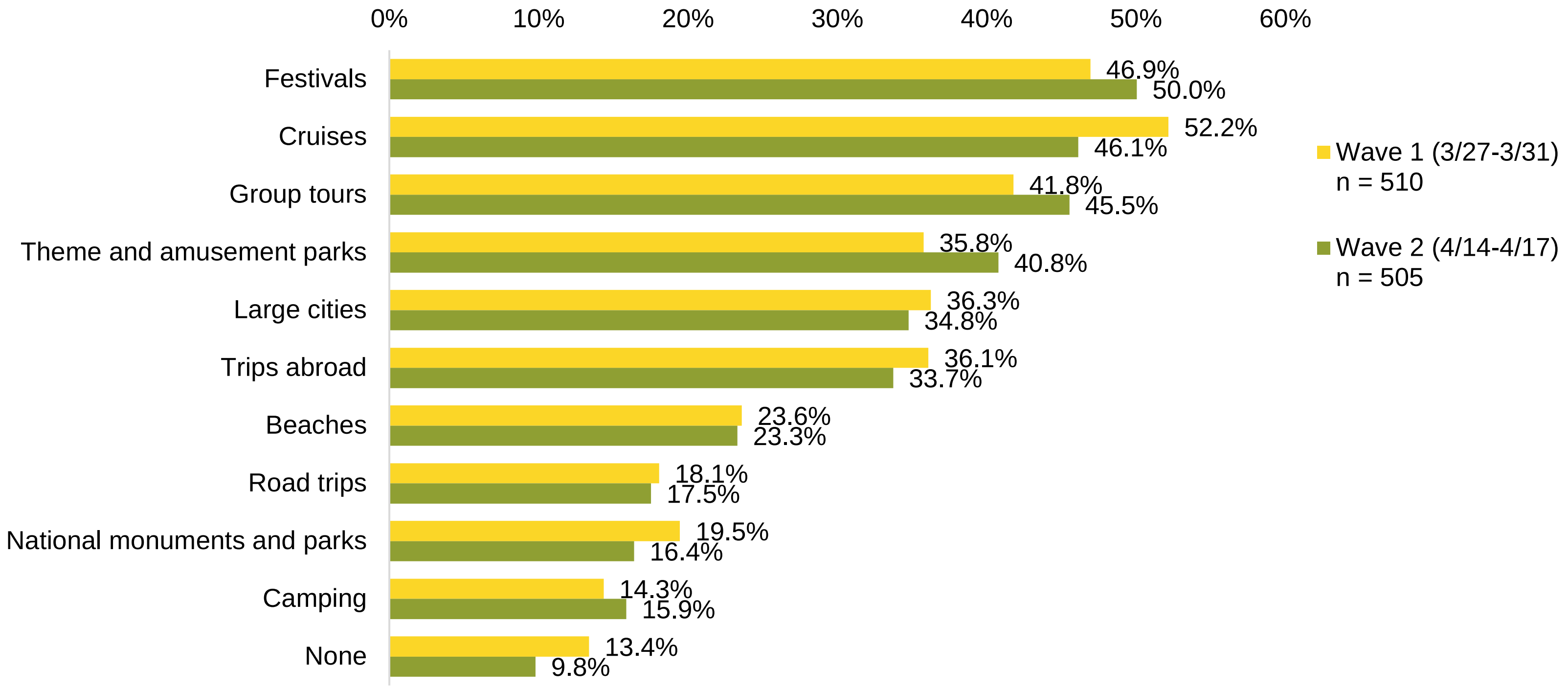
Q11. And still thinking about the time immediately following the pandemic, which modes of transportation will be the safest for traveling long distances? (Please click and drag to rank the listed selections below, where 1 = the most safe and 5 = the least safe)

Top indicators that will be most influential to U.S. travelers in determining when it is safe to travel within the U.S. again are when the government lifts travel restrictions and when the number of cases and/or deaths decline.



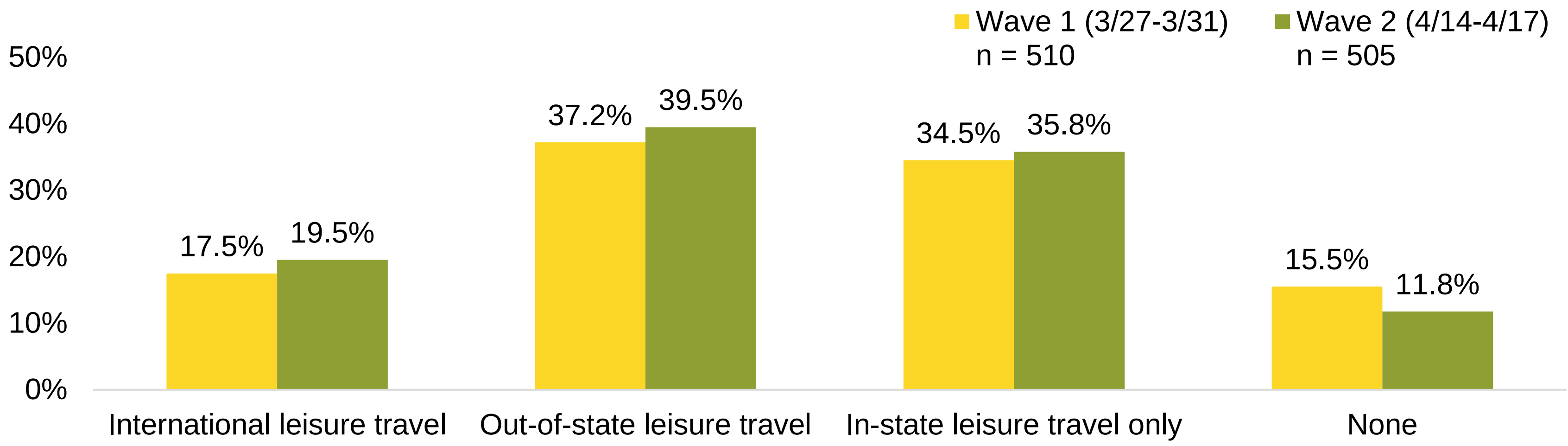
Q8b Which of the following indicators will be the most influential in determining when you think it is safe to travel within the U.S. again? Indicate only those that will be most influential to your decision – up to three. *Question introduced in Wave 2 (4/14-4/17)*

There were no significant differences wave-over-wave in the places that U.S. travelers will avoid after the COVID-19 pandemic, with festivals and cruises topping the list.



 Q14. If any, what types of places are you going to avoid traveling to in the U.S. after the COVID-19 pandemic? (Select all that apply)

The type of leisure travel U.S. travelers expect to engage in immediately after the restrictions are lifted has remained steady wave-over-wave.



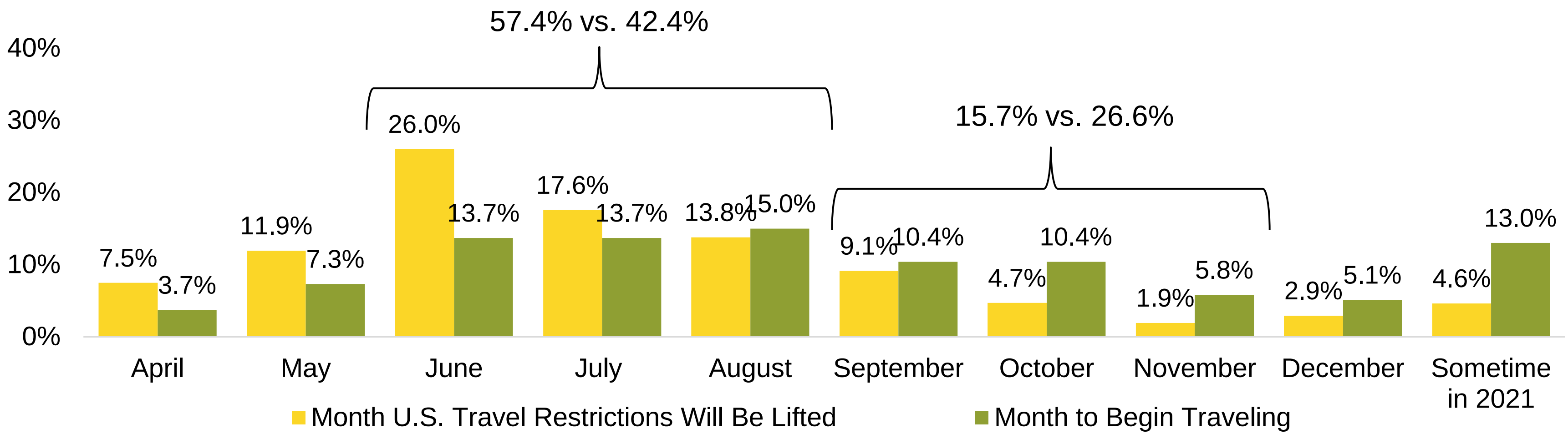
BVK Q9. Immediately following the removal of travel restrictions, what type of leisure-travel would you do?

There was a decline in the proportion of U.S. travelers who say they will get back to their normal travel behaviors fairly quickly and an increase in those who say they will take more time to get back to travel behaviors.

	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Top 3 Box	**45.7% B**	38.5%
Top 2 Box	**24.9% B**	18.4%
Immediately	**10.0%**	9.7%
After a few days	**14.9% B**	8.7%
A few weeks	20.7%	20.1%
About a month	20.0%	18.0%
Bottom 3 Box	34.3%	**43.6% A**
Bottom 2 Box	5.4%	**9.8% A**
A few months	28.9%	**33.8% A**
A year	3.7%	**7.4% A**
More than a year	1.7%	2.4%

Q17. After the official "all clear" is given by government, how quickly do you expect to return to your normal behaviors regarding travel within the U.S.?

While many travelers expect U.S. travel restrictions to be lifted this summer, fewer expect to start traveling again this summer while just over one-fourth expect to begin traveling again in the fall.



n = 505

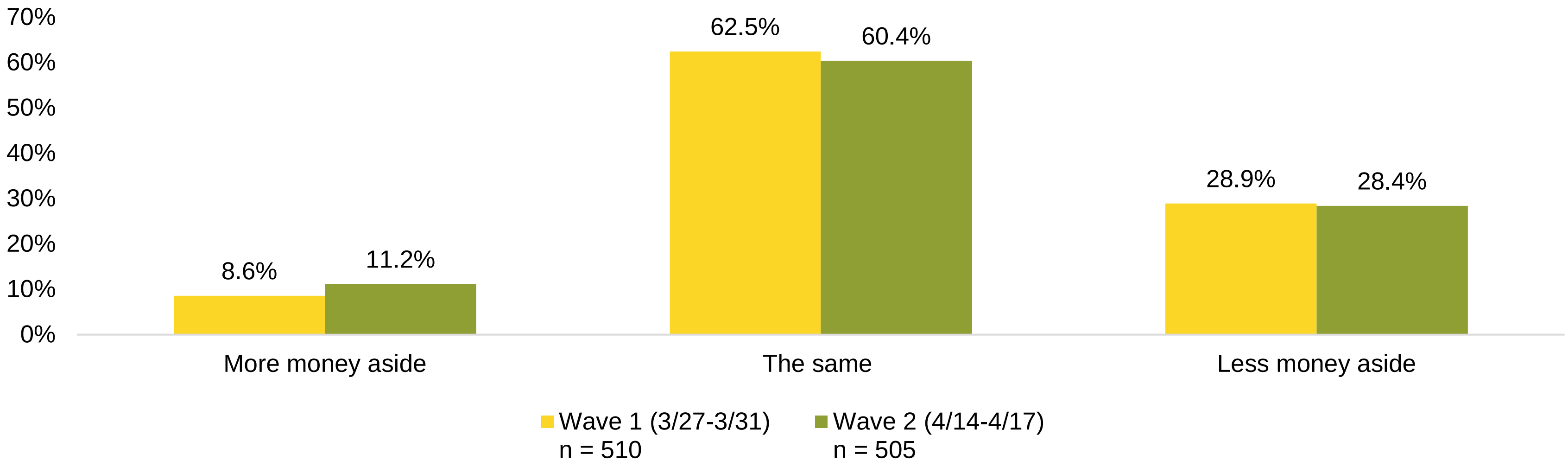
Q17c. During which month do you personally expect to start traveling within the U.S. again? Q17b. At this point, during which month do you expect the travel restrictions to be lifted within the U.S.? *Questions introduced in Wave 2 (4/14-4/17)*

Travelers in wave 2 are more likely to say they will travel slightly less often for leisure (36%) compared to those in wave 1 (30%).

	Wave 1 (3/27-3/31) A n = 510	Wave 2 (4/14-4/17) B n = 505
Top 2 Box	7.8%	9.8%
Traveling a lot more often for leisure	2.2%	1.8%
Traveling slightly more often for leisure	5.6%	8.0%
Not changing how often I travel for leisure	**36.8% B**	29.4%
Bottom 2 Box	55.4%	60.8%
Traveling slightly less often for leisure	29.8%	**35.9% A**
Traveling a lot less often for leisure	25.6%	24.9%

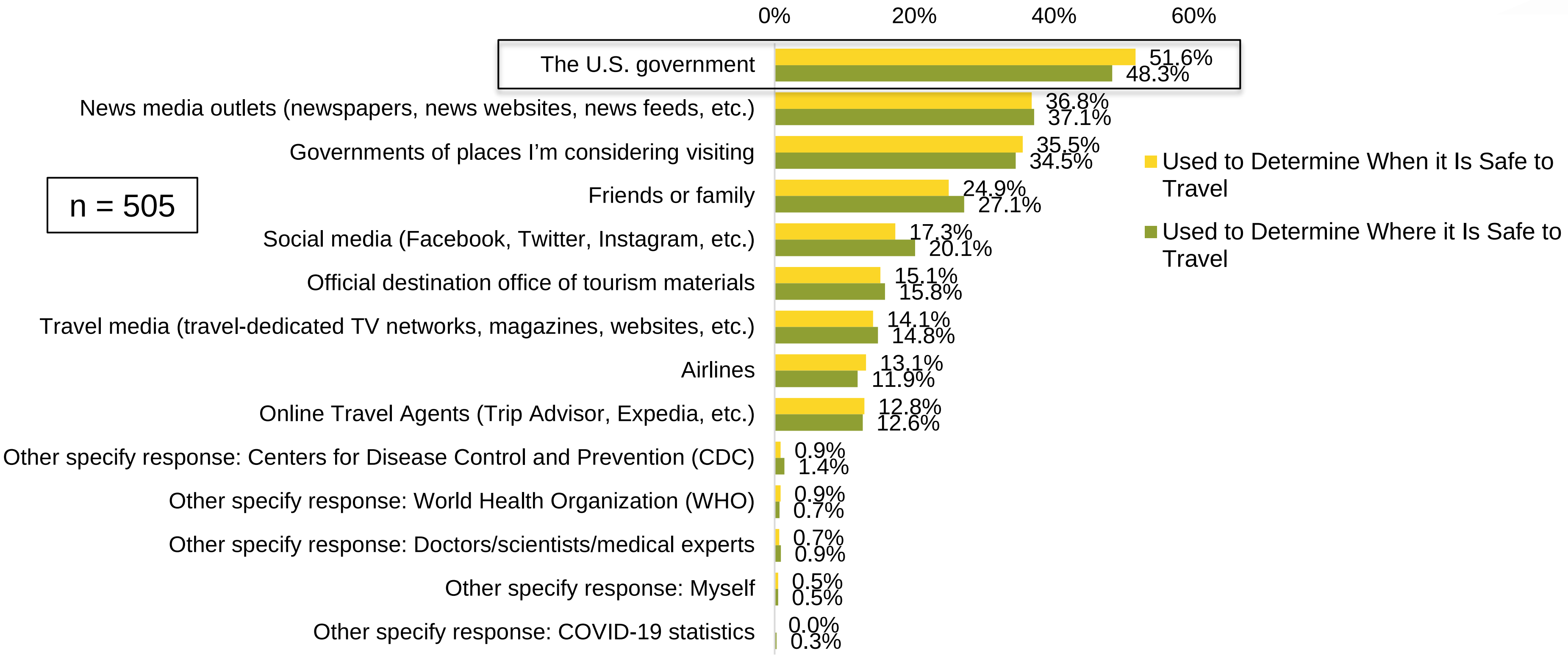
Q12. Longer term, as a result of the COVID-19 pandemic, which of the following do you anticipate for your own leisure travel within the U.S., compared to before the pandemic?

U.S. travelers' expectations for the proportion of money they will set aside post-pandemic have remained steady wave-over-wave with 6 in 10 saying they will set aside the same amount.



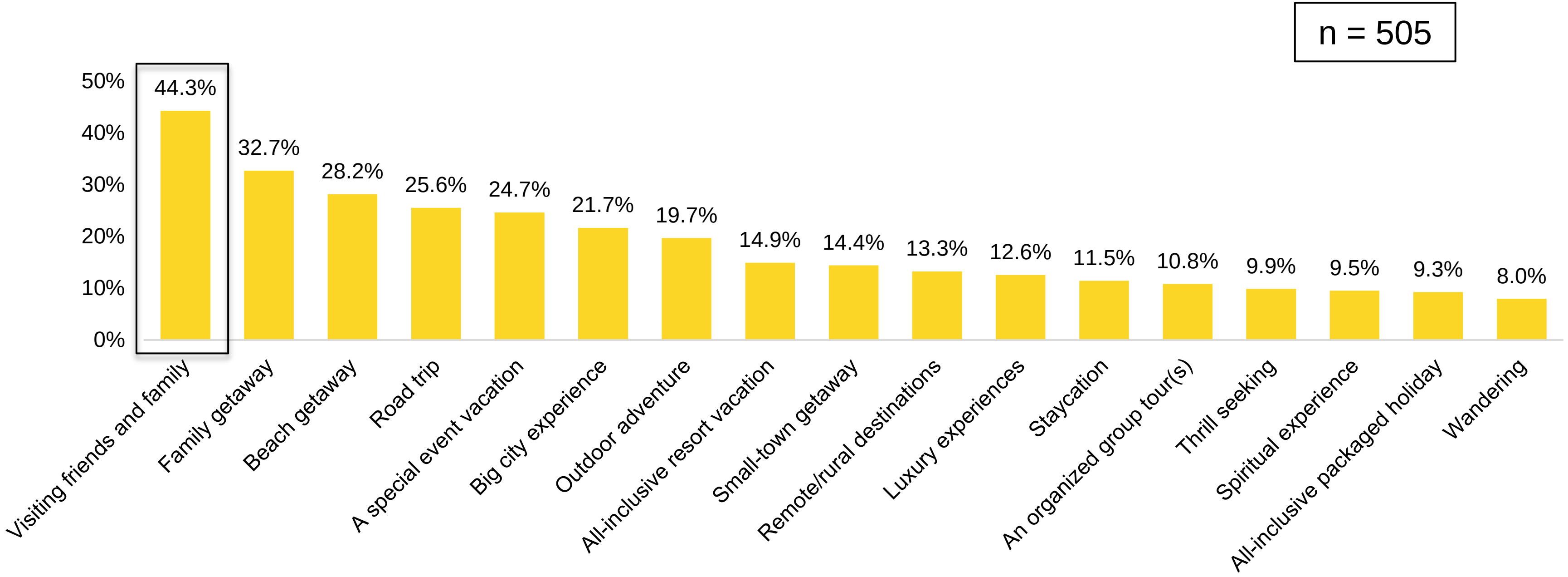
Q13. Once the COVID-19 pandemic is past, do you expect to set aside more, the same, or less money for your leisure travel in the U.S., compared to before the pandemic?

The most trusted sources used to determine when it is safe to travel and where it is safe to travel are effectively identical, with the U.S. government.



Q18b When planning your next leisure travel, who will you most trust to provide information that will help you decide when it is safe to travel? (Please select up to three.) Q18a When planning your next leisure travel, who will you most trust to provide information that will help you decide where it is safe to travel? (Please select up to three.) *Questions introduced in Wave 2 (4/14-4/17)*

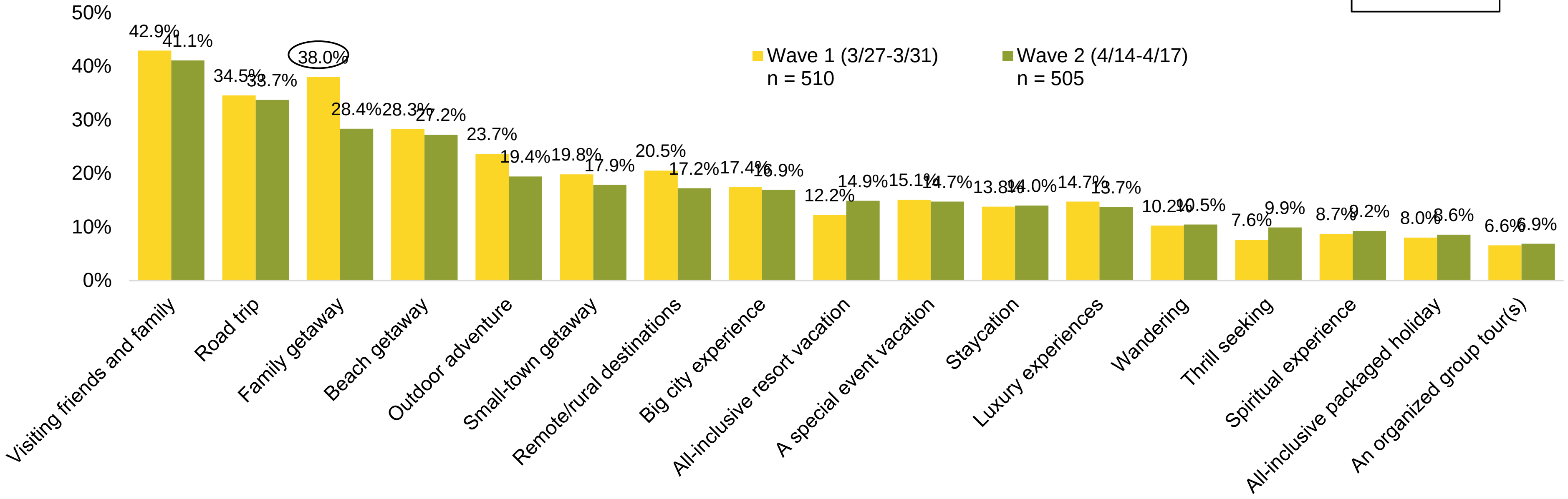
Before the COVID-19 pandemic, U.S. travelers say they were most looking forward to visiting friends and family, a family getaway, a beach getaway or a road trip.



Q15a. What type of travel vacation were you looking forward to taking within the U.S. before the COVID-19 pandemic? (Select those you were most looking forward to – up to 5.) *Question introduced in Wave 2 (4/14-4/17)*

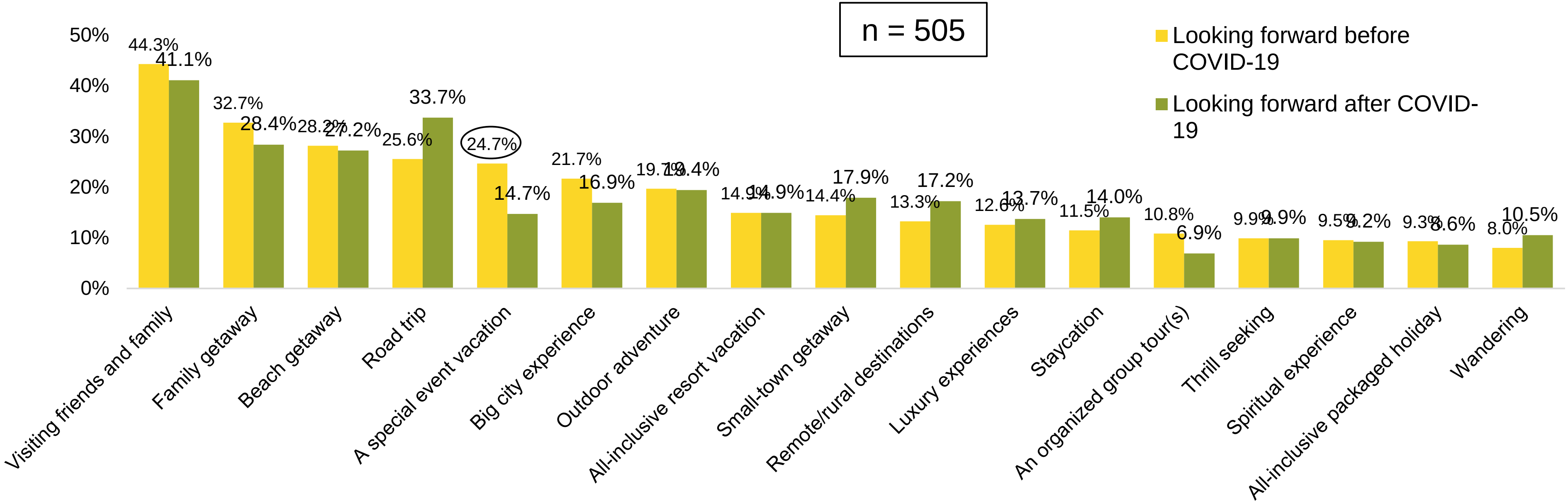
The proportion of U.S. travelers who say they are looking forward to a family getaway after the COVID-19 pandemic has decreased wave-over-wave. Travelers still desire less populated vacations.

n = 505



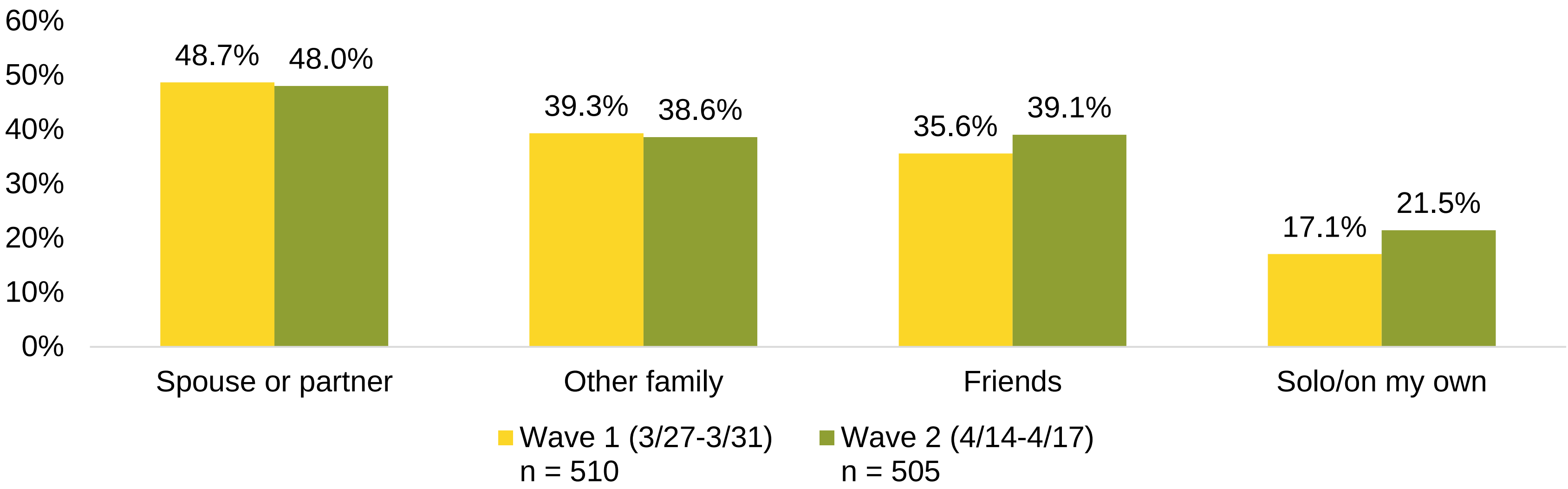
Q15b. What type of travel vacation are you looking forward to taking within the U.S. after the COVID-19 pandemic? (Select those you are most looking forward to – up to 5.)

U.S. travelers were more likely to be looking forward to a special event vacation *before* the COVID-19 pandemic compared to afterwards.



Q15a. What type of travel vacation were you looking forward to taking within the U.S. before the COVID-19 pandemic? (Select those you were most looking forward to – up to 5.) *Question introduced in Wave 2 (4/14-4/17)* Q15b. What type of travel vacation are you looking forward to taking within the U.S. after the COVID-19 pandemic? (Select those you are most looking forward to – up to 5.)

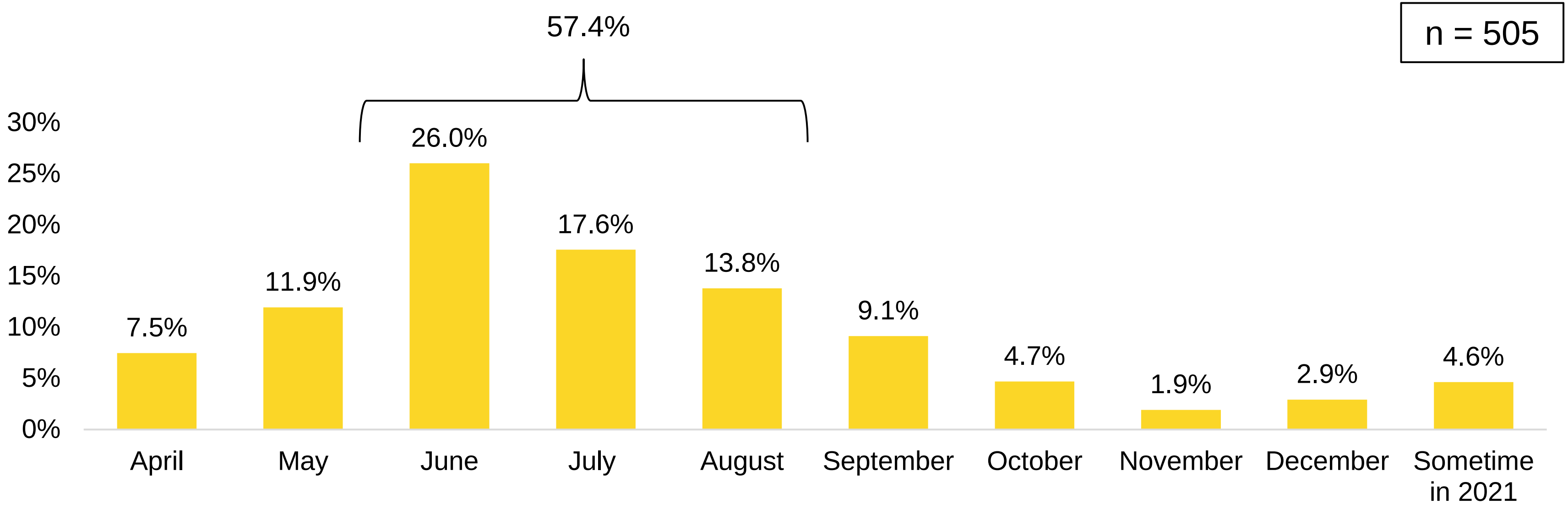
The people that U.S. travelers are most looking forward to traveling with has remained consistent wave-over-wave.



Q16. When travel restrictions are lifted and you take that first vacation post-COVID-19, who are you most looking forward to spending the time with? (Indicate all that apply.)

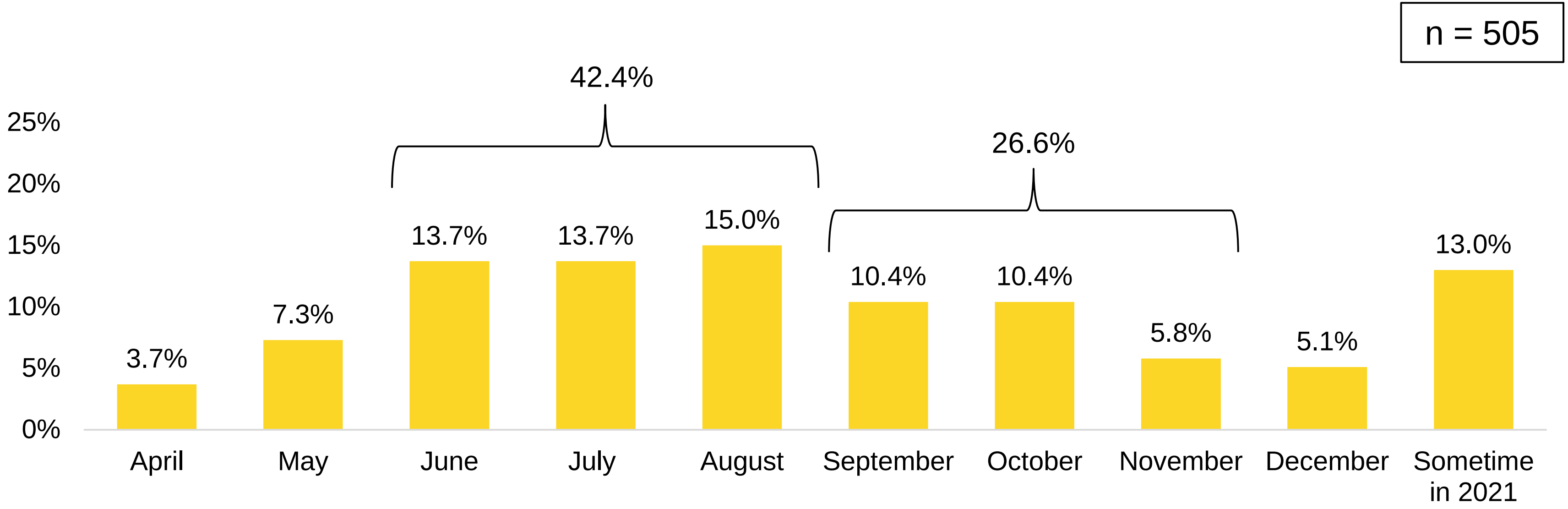
Appendix

Nearly 6 in 10 U.S. travelers (57%) expect the travel restrictions to be lifted within the U.S. sometime this summer.



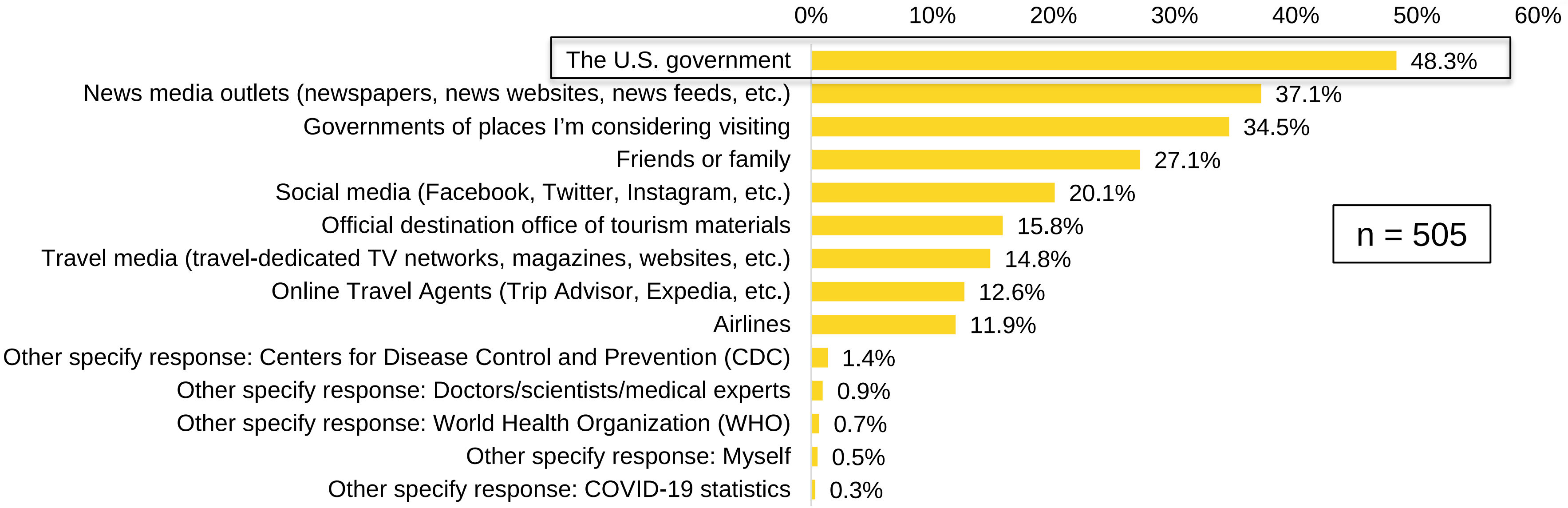
Q17b. At this point, during which month do you expect the travel restrictions to be lifted within the U.S.?
Question introduced in Wave 2 (4/14-4/17)

Just over 4 in 10 U.S. travelers (42%) say they expect to personally begin traveling within the U.S. again sometime this summer. Just over one-fourth (27%) say they expect to get back to traveling sometime this fall.



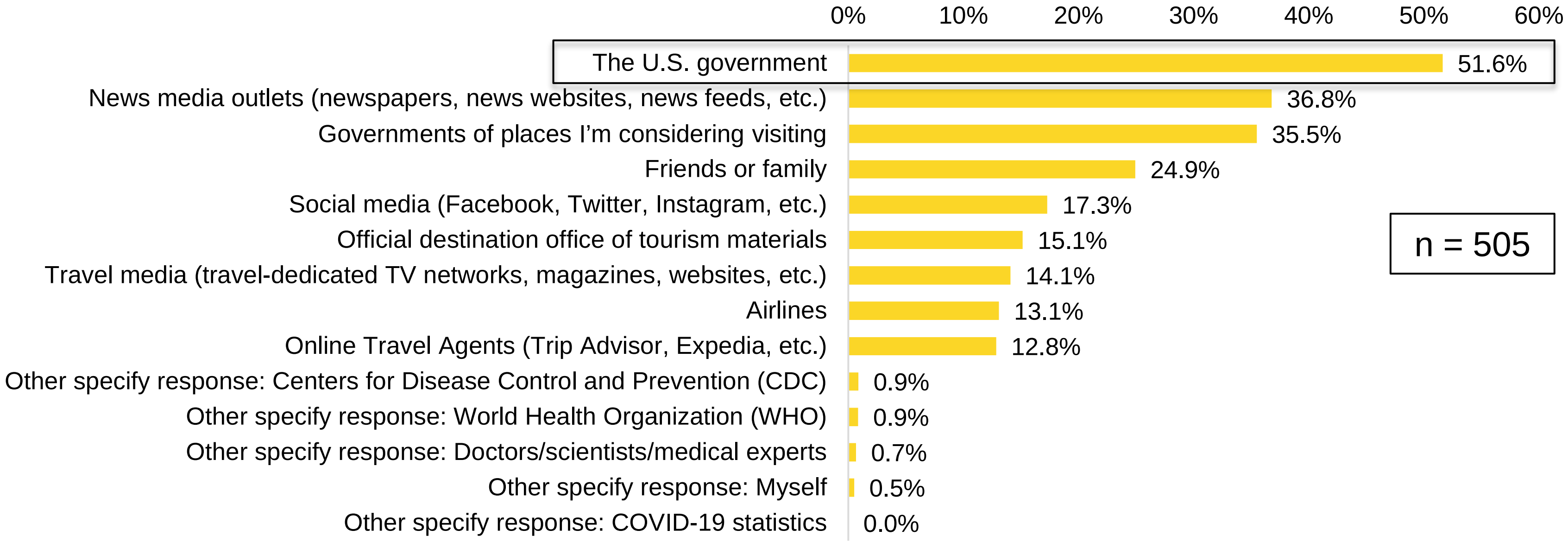
Q17c. During which month do you personally expect to start traveling within the U.S. again?
Question introduced in Wave 2 (4/14-4/17)

U.S. travelers say the most trusted information source when deciding *where* it is safe to travel is the U.S. government.



Q18a When planning your next leisure travel, who will you most trust to provide information that will help you decide where it is safe to travel? (Please select up to three.) *Question introduced in Wave 2 (4/14-4/17)*

Similar to the sources used to determine *where* it is safe to travel, U.S. travelers say the most trusted information source they will use when deciding *when* it is safe to travel is the U.S. government.



Q18b When planning your next leisure travel, who will you most trust to provide information that will help you decide when it is safe to travel? (Please select up to three.) *Question introduced in Wave 2 (4/14-4/17)*

Participant Profile

		Wave 1 (n=510)	Wave 2 (n=505)
Age	18-24	13.7%	13.9%
	25-34	28.6%	28.3%
	35-44	11.6%	12.3%
	44-54	18.0%	19.8%
	55-64	19.2%	17.8%
	65-74	8.2%	6.9%
	75 or older	0.6%	1.0%
	Mean	42.4	42.1
	Median	39.5	39.5
Gender	Male	53.9%	54.5%
	Female	45.3%	43.2%
	Other	0.8%	2.2%
Income	Under $35,000	15.7%	15.0%
	$35,000-$49,999	22.5%	23.6%
	$50,000-$74,999	19.6%	19.8%
	$75,000-$99,999	17.6%	17.8%
	$100,000-$149,999	14.9%	14.3%
	$150,000-$199,999	4.9%	5.9%
	$200,000-$249,999	2.2%	1.4%
	$250,000 or more	2.4%	1.6%
	Prefer not to answer	0.2%	0.6%
	Mean	$78,707.80	$76,767.50
	Median	$62,499.50	$62,499.50

		Wave 1 (n=510)	Wave 2 (n=505)
U.S. Region	Northeast	14.7%	15.2%
	Midwest	15.5%	13.3%
	South	40.8%	37.8%
	West	29.0%	33.5%
Income	Married	64.7%	60.0%
	Single, never married	24.7%	30.3%
	Divorced	6.1%	7.7%
	Widowed	2.7%	1.2%
	Separated	1.0%	0.4%
	Other (specify)	0.8%	0.4%
Education	High school diploma or GED	5.9%	7.7%
	Trade or technical school certificate	4.3%	3.0%
	Associate Degree	11.4%	8.7%
	Some college	6.9%	10.7%
	Bachelor's degree	55.7%	51.9%
	Graduate degree	15.9%	18.0%
Employment Status	Work full time	74.9%	72.7%
	Work part time	7.8%	8.3%
	Self-employed	7.6%	8.1%
	Retired	5.3%	6.7%
	Student	3.1%	2.6%
	Homemaker	1.8%	2.0%
	Unemployed, looking for work	1.57%	3.2%

		Wave 1 (n=510)	Wave 2 (n=505)
Presence of Children	Yes	49.0%	43.6%
	No	51.0%	56.4%
Travel in Past 2 Years	Has Taken A Domestic Leisure Trip	83.9%	84.4%
	Has Taken an International Leisure Trip	38.0%	38.6%

Various questions, unweighted data shown

Thank you.