Travel Sentiment Study Wave 9

MAY 12, 2020
COVID-19

TRAVEL SENTIMENT STUDY
WAVE 9

Fielded May 6, 2020
U.S. National Sample of 1,000 adults 18+
77% of travelers planning to travel in the next six months will change their travel plans due to coronavirus.

- Canceled trip completely: 49%
- Reduced travel plans: 46%
- Changed destination to one I can drive to as opposed to fly: 22%
- Changed trip from international to domestic: 12%

Base: Coronavirus Changed Travel Plans
Travel Sentiment Study Wave 9

Travelers Planning to Change Upcoming Travel Plans Due to COVID-19 Comparison

IMPACT ON TRAVEL PLANS

<table>
<thead>
<tr>
<th>Date</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 11</td>
<td>58%</td>
</tr>
<tr>
<td>Mar 19</td>
<td>75%</td>
</tr>
<tr>
<td>Mar 26</td>
<td>84%</td>
</tr>
<tr>
<td>Apr 1</td>
<td>84%</td>
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<tr>
<td>Apr 8</td>
<td>85%</td>
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<tr>
<td>Apr 15</td>
<td>82%</td>
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<tr>
<td>Apr 22</td>
<td>82%</td>
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<tr>
<td>Apr 29</td>
<td>79%</td>
</tr>
<tr>
<td>May 6</td>
<td>77%</td>
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</tbody>
</table>
Impact of COVID-19 on Upcoming Travel Plans Comparison

Base: Coronavirus Changed Travel Plans

- Canceled trip completely
- Reduced travel plans
Impact of COVID-19 on Upcoming Travel Plans Comparison

- Changed destination to one I can drive to as opposed to fly
- Changed trip from international to domestic

Base: Coronavirus Changed Travel Plans

<table>
<thead>
<tr>
<th>Date</th>
<th>Change in Travel Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 11</td>
<td>30%</td>
</tr>
<tr>
<td>Mar 19</td>
<td>18%</td>
</tr>
<tr>
<td>Mar 26</td>
<td>17%</td>
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<tr>
<td>Apr 1</td>
<td>22%</td>
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<tr>
<td>Apr 8</td>
<td>19%</td>
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<tr>
<td>Apr 15</td>
<td>21%</td>
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<tr>
<td>Apr 22</td>
<td>22%</td>
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<tr>
<td>Apr 29</td>
<td>25%</td>
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<tr>
<td>May 6</td>
<td>22%</td>
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</tbody>
</table>

- 22% on Mar 11
- 14% on Mar 19
- 11% on Mar 26
- 13% on Apr 1
- 11% on Apr 8
- 11% on Apr 15
- 11% on Apr 22
- 12% on Apr 29
- 12% on May 6
Factors Impacting Decisions to Travel in Next 6 Months

- **Coronavirus/COVID-19**
  - 6%: No impact at all
  - 6%: Slight impact
  - 14%: Little impact
  - 20%: Moderate impact
  - 54%: Greatly impact

- **Concerns about the economy**
  - 17%: No impact at all
  - 14%: Slight impact
  - 23%: Little impact
  - 22%: Moderate impact
  - 23%: Greatly impact

- **Transportation costs**
  - 21%: No impact at all
  - 18%: Slight impact
  - 27%: Little impact
  - 19%: Moderate impact
  - 16%: Greatly impact
Indicated that Coronavirus Would Greatly Impact their Decision to Travel in the Next Six Months

Travel Sentiment Study Wave 9
Indicated that the **Economy** Would Greatly Impact their Decision to Travel in the Next Six Months
Travelers with Travel Plans in the Next Six Months Comparison

<table>
<thead>
<tr>
<th>Date</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 11</td>
<td>87%</td>
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<tr>
<td>Mar 19</td>
<td>76%</td>
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<tr>
<td>Mar 26</td>
<td>72%</td>
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<tr>
<td>Apr 1</td>
<td>65%</td>
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<tr>
<td>Apr 8</td>
<td>70%</td>
</tr>
<tr>
<td>Apr 15</td>
<td>72%</td>
</tr>
<tr>
<td>Apr 22</td>
<td>69%</td>
</tr>
<tr>
<td>Apr 29</td>
<td>70%</td>
</tr>
<tr>
<td>May 6</td>
<td>69%</td>
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</tbody>
</table>
IMPACT ON TRAVEL PLANS

Information and Content of Interest to Travelers

- Deals and offers for travel, dining, and entertainment for future use: 54%
- Delivery and takeout food options in your community: 48%
- Ways to support local businesses/organizations and their staff impacted by COVID-19: 43%
- Purchasing merchandise and gift cards from local businesses online: 24%
- Online virtual tours of museums, art galleries, and other visitor attractions: 23%
- Live streams of performances by local musicians, artists, or theater groups: 23%
- Videos of inspirational or interesting travel destinations: 23%
- Sharing travel experiences or ideas with others online during this time: 20%
- 360-degree images/videos or virtual reality experiences of travel destinations: 17%
IMPACT ON TRAVEL PLANS

Information and Content of Interest to Travelers - Comparison

- Deals and offers for travel, dining, and entertainment for future use: 54% May 6, 49% Apr 8
- Delivery and takeout food options in your community: 50% May 6, 48% Apr 8
- Ways to support local businesses/organizations and their staff impacted by COVID-19: 49% May 6, 43% Apr 8
- Purchasing merchandise and gift cards from local businesses online: 27% May 6, 24% Apr 8
- Online virtual tours of museums, art galleries, and other visitor attractions: 25% May 6, 23% Apr 8
- Live streams of performances by local musicians, artists, or theater groups: 23% May 6, 23% Apr 8
- Videos of inspirational or interesting travel destinations: 26% May 6, 23% Apr 8
- Sharing travel experiences or ideas with others online during this time: 20% May 6, 17% Apr 8
- 360-degree images/videos or virtual reality experiences of travel destinations: 19% May 6, 20% Apr 8

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Perceptions of Visitors and Travel

- **I support opening up my community to visitors**
  - 14% Strongly disagree
  - 21% Disagree
  - 31% Neutral
  - 23% Agree
  - 12% Strongly agree

- **I feel safe traveling outside my community**
  - 13% Strongly disagree
  - 20% Disagree
  - 27% Neutral
  - 28% Agree
  - 12% Strongly agree

- **I feel safe welcoming visitors back to my community**
  - 12% Strongly disagree
  - 23% Disagree
  - 31% Neutral
  - 22% Agree
  - 11% Strongly agree

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Additional Resources

Longwoods International Research
longwoods-intl.com/news

Miles Partnership COVID-19 Communication Center
covid19.milespartnership.com
Thank You