

Longwoods International Travel USA® Highlights

(July-Sept.) 2020

In the first half of 2020, we saw steep declines in domestic volume, the rise of road trips, increased travel party sizes and an increased length in domestic trips, according to data from Longwoods International's Travel USA® research. Travel USA is the largest ongoing study of travel in the U.S., fielded quarterly to survey Americans about their domestic travel. This quarterly tracking data allows us to measure and report timely changes in travel patterns, which is particularly useful in 2020 due to the ever-changing impacts of the pandemic.

The Travel USA® visitor profile data for the third quarter of 2020 provides detailed insights into the changes in U.S. traveler behavior, which is much in line with American traveler sentiment throughout this time period. Here are the key trends emerging from the data as we look at the third quarter of 2020, most notably a traditionally busy travel season for the U.S.

- Travel showed signs of increase in Q3 from lows seen in the second quarter, driven by an increase in both day and overnight, while travel still remained well below long-term norms
 - Slightly less than half of Americans took at least one overnight trip in Q3 2020. This is over 10-points lower than the same quarter of 2019.
- The pandemic's impact on planned travel continued to wane and trip cancellations declined, with more respondents choosing to revise their travel plans instead.
- In-state overnight travel among residents of most states continued to be higher than pre-pandemic levels.

Overnight Travel

- Compared to the same period last year, Q3 per-person average overnight trip spending is down only 2%, with the leisure category seeing per-person spending levels comparable to the same time period in last year, while business traveler spending declined 7% during Q3.
- In Q3, visiting friends and relatives (VFR) remains the top trip type, representing four in ten of all domestic overnight trips. Additionally, the share of outdoor trips again outpaced that of levels in 2019 representing over 10% of all overnight domestic trips.
 - While VFR remained a top trip type in Q3, there was a softening in share of overnight trips compared to that of Q2.
- Less than 20% of Q3 2020 overnight trips involved commercial flights, showing no gains from Q2 2020. Road trips using personal cars/trucks remains the top transportation method of the quarter, the choice of almost ¾ of travelers during Q3 2020.
- Bookings through short-term rental websites continue to hold onto the share they've gained in the pandemic and were used in one in ten total overnight trips in Q3 2020.
- Average party size for overnight trips continues to be elevated by 10% in Q3 compared to pre-pandemic levels, with an average of more than three people on each trip. In addition, overnight travelers in Q3 started reporting longer trips, both versus the previous quarter and the same time period in 2019.

Day Travel

- Overall, per-person day trip expenditures remained stable from Q2, as increases in spending on food and beverage and retail balanced declines in spending on transportation.
 - The greatest gains in spending were seen among marketable day trips where both year over year and quarterly gains were observed, also driven by increases in spending on food & beverage and retail.
- As with overnight trips, the increase in marketable trips balanced a softening in share of VFR day travel compared to the prior quarter, with day travelers touring more in the third quarter.
- Outdoor pursuits continued to be a top activity among day travelers in Q3.
- Average party size remained stable quarter over quarter averaging near 2.6 persons per travel party.

Fielded quarterly, Travel USA[®] is the largest and longest ongoing study of American travelers. Longwoods International will evaluate these trends on a quarterly basis and will make those national insights available. For more information, contact info@longwoods-intl.com.