COVID-19

TRAVEL SENTIMENT STUDY

WAVE 18

Fielded August 12, 2020

U.S. National Sample of 1,000 adults 18+
73% of travelers planning to travel in the next six months will change their travel plans due to coronavirus.

- Reduced travel plans: 47%
- Canceled trip completely: 42%
- Changed destination to one I can drive to as opposed to fly: 27%
- Changed trip from international to domestic: 16%

Base: Coronavirus Changed Travel Plans
Travelers Planning to Change Upcoming Travel Plans Due to COVID-19 Comparison

IMPACT ON TRAVEL PLANS

Mar 11  Mar 19  Mar 26  Apr 1  Apr 8  Apr 15  Apr 22  Apr 29  May 6  May 13  May 20  May 27  June 3  June 17  July 1  July 15  July 29  Aug 12

58% 75% 84% 84% 85% 82% 82% 79% 77% 77% 73% 75% 69% 69% 76% 77% 73% 73%
Impact of COVID-19 on Upcoming Travel Plans Comparison

Base: Coronavirus Changed 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
Factors Impacting Decisions to Travel in Next 6 Months

- Coronavirus/COVID-19:
  - 8%: No impact at all
  - 7%: Slight impact
  - 16%: Moderate impact
  - 23%: Significant impact
  - 45%: Greatly impact

- Concerns about the economy:
  - 19%: No impact at all
  - 13%: Slight impact
  - 27%: Moderate impact
  - 22%: Significant impact
  - 18%: Greatly impact

- Transportation costs:
  - 22%: No impact at all
  - 13%: Slight impact
  - 27%: Moderate impact
  - 19%: Significant impact
  - 18%: Greatly impact

IMPACT ON TRAVEL PLANS
Indicated that **Coronavirus** Would Greatly Impact their Decision to Travel in the Next Six Months
Indicated that the **Economy** Would Greatly Impact their Decision to Travel in the Next Six Months
Travel Sentiment Study Wave 18

Impact on Travel Plans

Travelers with Travel Plans in the Next Six Months Comparison

- March 11: 87%
- March 19: 76%
- March 26: 72%
- April 1: 65%
- April 8: 70%
- April 15: 72%
- April 22: 69%
- April 29: 70%
- May 6: 69%
- May 13: 67%
- May 20: 71%
- May 27: 71%
- June 3: 70%
- June 17: 72%
- July 1: 65%
- July 15: 67%
- July 29: 68%
- August 12: 64%
IMPACT ON TRAVEL PLANS

I am hesitant to travel because...

- Travel restrictions* are unclear in the destinations I’m interested in visiting (52%)
- Travel restrictions* vary between destinations (48%)
- Health & safety protocols** are unclear in the destinations I’m interested in visiting (43%)
- Health & safety protocols** vary between destinations (42%)
- I do not feel safe traveling outside my community (40%)
- I am not sure if visitors are welcome in the destinations I’m interested in visiting (25%)

**Base: Travelers with hesitations about traveling

*Travel quarantines, etc.
**Mask requirements, social distancing, etc.
Perceptions of Safety and Travel

I support opening up my community to visitors

- Strongly disagree: 14%
- Disagree: 20%
- Neutral: 31%
- Agree: 23%
- Strongly agree: 12%

I feel safe traveling outside my community

- Strongly disagree: 13%
- Disagree: 20%
- Neutral: 28%
- Agree: 26%
- Strongly agree: 13%

I would feel safe dining in local restaurants and shopping in retail stores in my community

- Strongly disagree: 16%
- Disagree: 17%
- Neutral: 22%
- Agree: 29%
- Strongly agree: 16%
I Support Opening Up My Community to Visitors
Comparison of Travelers Who Strongly Agree or Agree
I Feel Safe Traveling Outside My Community
Comparison of Travelers Who Strongly Agree or Agree

May 6: 40%
May 13: 35%
May 20: 42%
May 27: 43%
June 3: 44%
June 17: 46%
July 1: 41%
July 15: 38%
July 29: 43%
Aug 12: 39%
I Would Feel Safe Dining in Local Restaurants and Shopping in Retail Stores Within My Community
Comparison of Travelers Who Strongly Agree or Agree

<table>
<thead>
<tr>
<th>Date</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>May 13</td>
<td>31%</td>
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Additional Resources

Longwoods International Research
longwoods-intl.com/news

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