COVID-19

TRAVEL SENTIMENT STUDY
WAVE 20

Fielded September 9, 2020
U.S. National Sample of 1,000 adults 18+
IMPACT ON TRAVEL PLANS

67% of travelers planning to travel in the next six months will change their travel plans due to coronavirus.

- Reduced travel plans: 50%
- Canceled trip completely: 34%
- Changed destination to one I can drive to as opposed to fly: 33%
- Changed trip from international to domestic: 15%

Base: Coronavirus Changed Travel Plans
Impact on Travel Plans

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Change Rate</th>
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<tbody>
<tr>
<td>Mar 11</td>
<td>58%</td>
</tr>
<tr>
<td>Mar 19</td>
<td>75%</td>
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<tr>
<td>Mar 26</td>
<td>84%</td>
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<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>
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<tr>
<td>May 6</td>
<td>77%</td>
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<tr>
<td>May 13</td>
<td>77%</td>
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<tr>
<td>May 20</td>
<td>73%</td>
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<tr>
<td>May 27</td>
<td>75%</td>
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<tr>
<td>June 3</td>
<td>69%</td>
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<tr>
<td>June 10</td>
<td>69%</td>
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<tr>
<td>July 1</td>
<td>76%</td>
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<tr>
<td>July 15</td>
<td>77%</td>
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<tr>
<td>July 29</td>
<td>73%</td>
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<tr>
<td>Aug 12</td>
<td>73%</td>
</tr>
<tr>
<td>Aug 26</td>
<td>73%</td>
</tr>
<tr>
<td>Sep 9</td>
<td>67%</td>
</tr>
</tbody>
</table>
Impact of COVID-19 on Upcoming Travel Plans Comparison

Base: Coronavirus Changed Travel Plans
Impact of COVID-19 on Upcoming Travel Plans Comparison

Base: Coronavirus Changed Travel Plans

- Changed destination to one I can drive to as opposed to fly
- Changed trip from international to domestic
Factors Impacting Decisions to Travel in Next 6 Months

- **Coronavirus/COVID-19**
  - 7% No impact at all
  - 6% Slightly impact
  - 16% Moderately impact
  - 22% Greatly impact
  - 22% Impacting a lot

- **Concerns about the economy**
  - 16% No impact at all
  - 15% Slightly impact
  - 27% Moderately impact
  - 19% Greatly impact
  - 22% Impacting a lot

- **Transportation costs**
  - 17% No impact at all
  - 13% Slightly impact
  - 30% Moderately impact
  - 20% Greatly impact
  - 21% Impacting a lot
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
IMPACT ON TRAVEL PLANS

Travelers with Travel Plans in the Next Six Months Comparison

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  Aug 26  Sep 9
Activities Travelers Plan to Participate in During Their Fall Travels

- Visit friends and family: 66%
- Take a road trip: 58%
- Visit a national park, state park, or monument: 33%
- View fall foliage: 30%
- Go on a hike or bicycle ride: 28%
- Visit a farmers market: 27%
- Visit a museum, art gallery, or other arts/cultural institution: 22%
- Visit a farm to experience fall harvest activities*: 22%
- Go to a winery, brewery, or distillery: 19%
- Visit an amusement park or theme park: 19%
- Attend a festival: 17%
- Go fruit or berry picking: 15%
- Attend or participate in a sporting event: 12%
- Tour a college or university: 5%
- Other: 3%

*Corn maze, hay rides, pumpkin patch, etc.
Perceptions of Safety and Travel

I support opening up my community to visitors
- Strongly disagree: 9%
- Disagree: 18%
- Neutral: 31%
- Agree: 28%
- Strongly agree: 15%

I feel safe traveling outside my community
- Strongly disagree: 8%
- Disagree: 16%
- Neutral: 25%
- Agree: 34%
- Strongly agree: 16%

I would feel safe dining in local restaurants and shopping in retail stores in my community
- Strongly disagree: 13%
- Disagree: 15%
- Neutral: 20%
- Agree: 34%
- Strongly agree: 18%
I Support Opening Up My Community to Visitors
Comparison of Travelers Who Strongly Agree or Agree

May 6: 35%
May 13: 31%
May 20: 36%
May 27: 40%
June 3: 46%
June 17: 41%
July 1: 34%
July 15: 36%
July 29: 36%
Aug 12: 35%
Aug 26: 44%
Sep 9: 43%
I Feel Safe Traveling Outside My Community
Comparison of Travelers Who Strongly Agree or Agree

Travel Sentiment Study Wave 20
I Would Feel Safe Dining in Local Restaurants and Shopping in Retail Stores Within My Community
Comparison of Travelers Who Strongly Agree or Agree

Travel Sentiment Study Wave 20
Additional Resources

Longwoods International Research
longwoods-intl.com/news

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