

COVID-19 U.S. Travel Sentiment Survey

March-September Summary

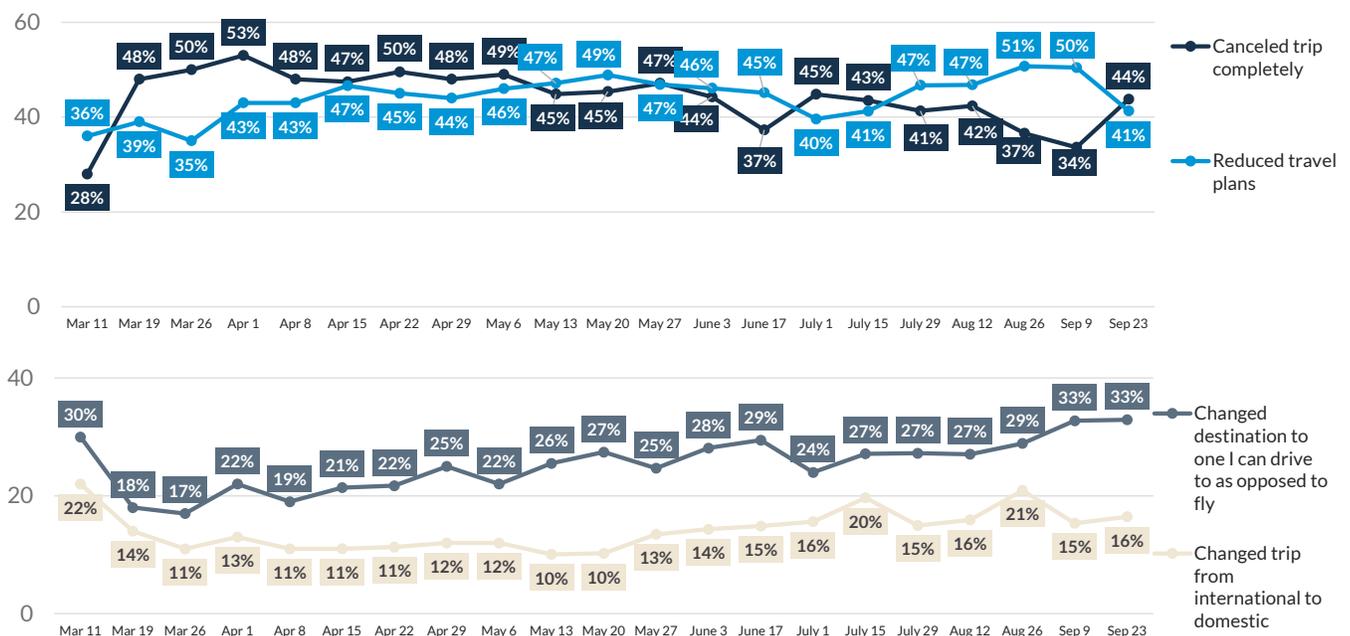
Since March 2020, Longwoods International's COVID-19 Travel Sentiment Study has tracked the perceptions, intentions and behavior of U.S. travelers during the Coronavirus pandemic. Sponsored by Miles Partnership, the study has surveyed a consistent set of questions every one to two weeks with a rotating list of custom questions probing topical issues. Just over six months into the pandemic, we have summarized the major trends and issues, challenges and opportunities that the research has highlighted.

[View More on the Travel Sentiment Study.](#)

1. A CAUTIOUS RECOVERY IN TRAVEL IS UNDERWAY

The initial spread of COVID-19 in March 2020 impacted or stopped the vast majority of travel across the U.S. and internationally. As of April 8, 85% of travel plans by Americans were canceled or deferred – the peak point of disruption. During the early lock downs and slow reopening in April and May, there was little sign of a recovery. Immediate travel intentions improved and then dropped back down through July as COVID-19 case numbers declined and then surged again. August and September saw stronger evidence of a cautious recovery with the number of travelers changing rather than canceling their trips growing sharply. The long-term outlook for tourism's recovery also looks robust. Pent up demand is real, and the desire to travel has remained strong and consistent. Throughout the entire pandemic around two-thirds of Americans still have travel plans in the next six months – tracking in a narrow band of 64% to 72% since April 1.

IMPACT OF COVID-19 ON UPCOMING TRAVEL PLANS COMPARISON



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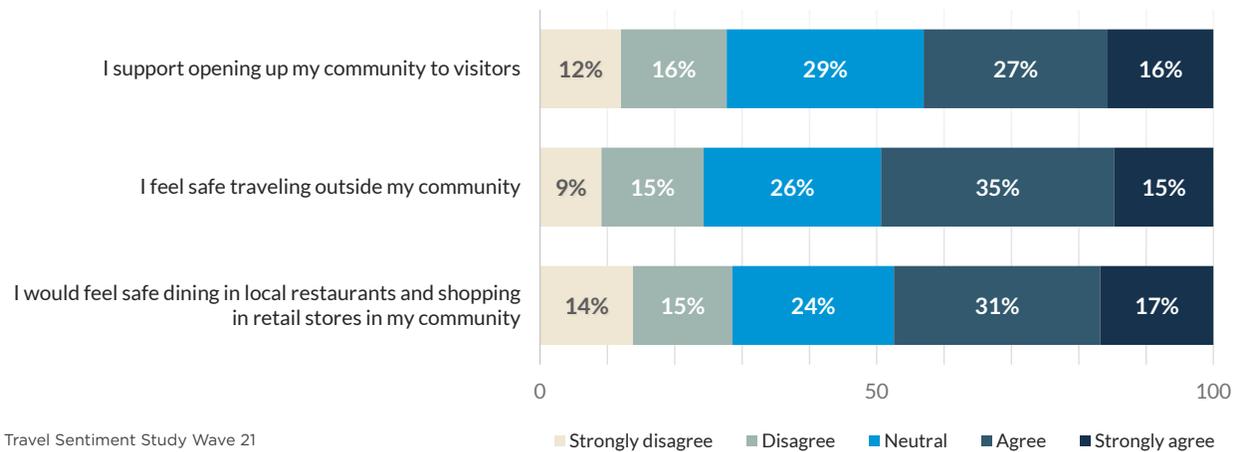
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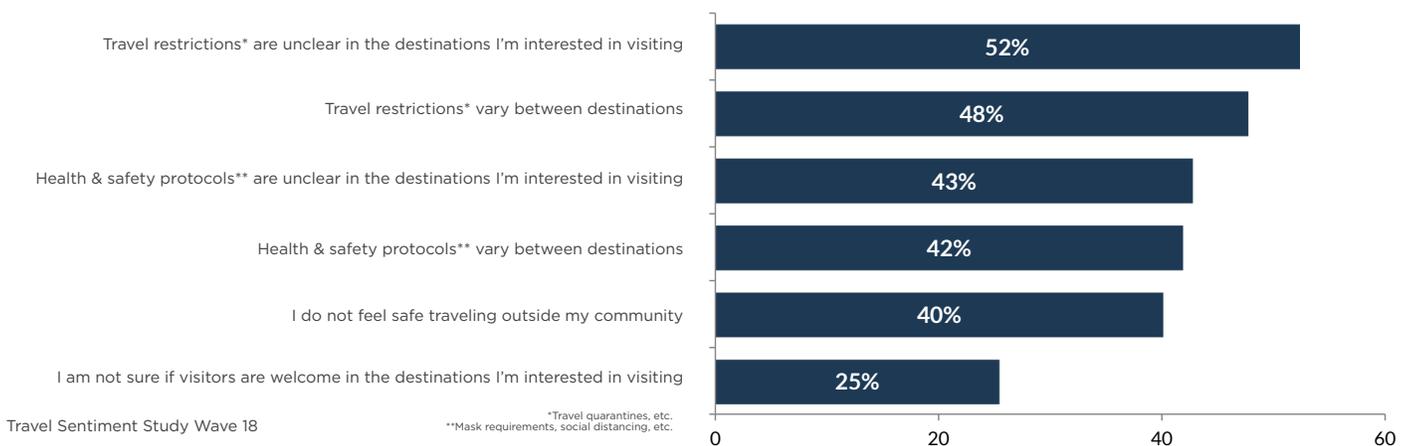
2. THE RECOVERY IS BUILT ON PERCEPTIONS OF HEALTH & SAFETY

Throughout the pandemic, the strong demand for travel collided with health and safety concerns. The survey has tracked how U.S. travelers feel through three fundamental questions for recovery: do they feel safe shopping or dining in their local community, opening up their community to visitors or traveling themselves? The percentage of U.S. travelers feeling safe in these decisions and activities remains at or below half of all U.S. travelers in late September in the range of 43% to 52% of respondents. A similar percent of U.S. travelers either do not feel safe in these activities or are undecided. One primary challenge has been inconsistent public advice and protocols. As of September, 86% of U.S. travelers are confused or unclear on travel restrictions and/or health and safety protocols in the destinations they are interested in visiting. U.S. travelers overwhelmingly want clear, consistent and mandatory health and safety information and protocols. For example, almost two-thirds (63%) want mandatory mask wearing. More clear and consistent health and safety protocols will be critical to the recovery of travel.

PERCEPTIONS OF SAFETY AND TRAVEL



I AM HESITANT TO TRAVEL BECAUSE...



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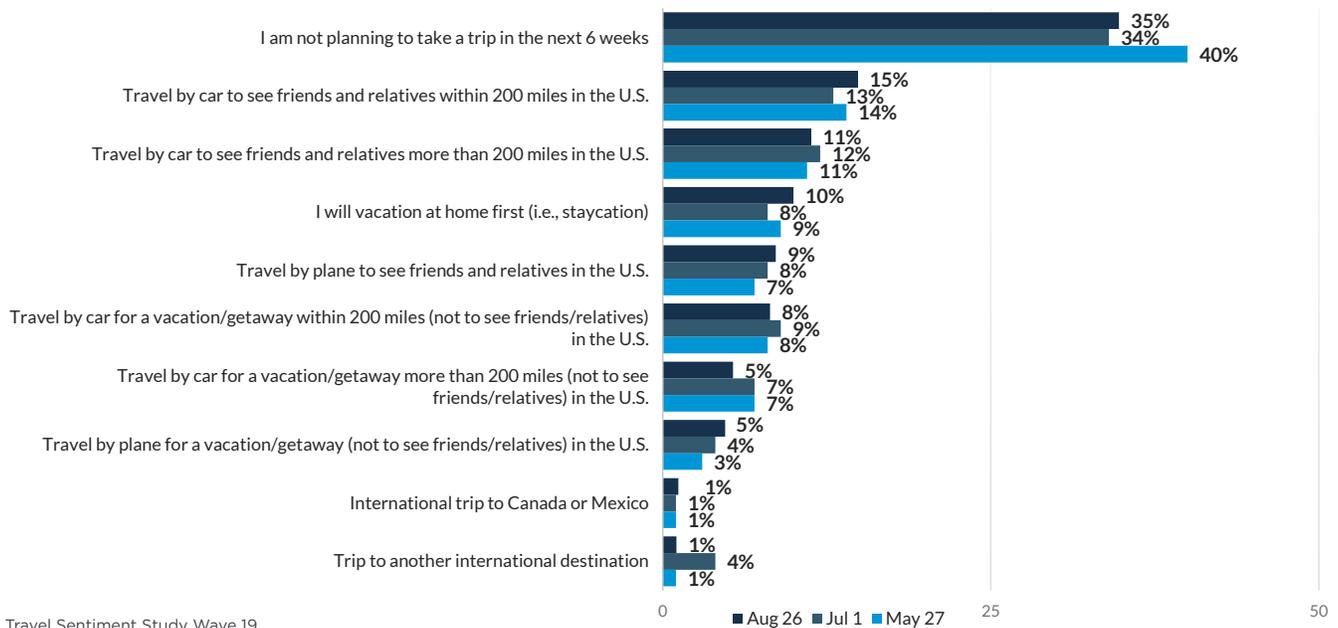
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3. REACHING & ENGAGING WITH TRAVELERS DURING COVID-19

The research has reinforced how locals are fundamental to recovery. They are critical to the recovery of local businesses and to officials feeling comfortable reopening their communities to travelers. They are also central to stimulating travel to visit friends and relatives (VFR) – an important motivator for a majority of trips in the immediate recovery of travel during COVID-19. Much of these VFR trips are by road which has also grown in the pandemic, along with outdoor activities and exploring outdoor destinations in natural areas. Many of these have enjoyed record late summer travel volumes. Urban destinations, those relying on business travel and/or conference and events, remain heavily impacted. To reach travelers willing to explore, the research has highlighted the importance of a multimedia strategy. Print resources, along with short form video and traditional media (e.g.: TV) were the top three sources of travel content consumed by U.S. travelers during the pandemic.

FIRST TRIP TRAVELERS WILL TAKE IN THE NEXT SIX WEEKS



Travel Sentiment Study Wave 19

BOTTOM LINE

The brighter outlook for travel in the fall and winter remains clouded by a possible rise of COVID-19 cases, illustrating how the health crisis is the driving factor. As long as COVID-19 remains a significant part of American life, the recovery of travel will be cautious and uncertain. In the short-term, clear and consistent health and safety information and protocols need to be evident in tourism's response. Inspiration and calls to action will only work with travelers who feel more confident and clear on the risks and practical realities of traveling during the pandemic. In the long-term, the recovery for travel looks strong and the fundamentals driving tourism's remarkable growth over recent decades remain robust. The tourism industry needs to navigate the many challenges of the coming months in order to prepare for the recovery ahead, which will be certain to have a new landscape.

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