

COVID-19 U.S. Travel Sentiment Survey

Fifteenth Edition: July 8, 2020

Longwoods International, with the support of Miles Partnership, is undertaking a tracking survey of U.S. travelers' intentions. This summarizes four critical data points from our survey using a national sample of 1,000 adults on July 1, 2020.

[View the full report.](#)

EXECUTIVE SUMMARY

INTENTIONS

The recent surge in new cases of COVID-19 in a majority of states has had a definite impact on U.S. travelers' confidence. At the start of July, U.S. travel intentions are retreating across many of the key indicators where there have been positive trends over the past couple of months. For example the percentage of Americans who have travel plans in the next six months has dropped to 65%, the lowest level since the April 1.

IMPACT

More immediate impacts on travel have also grown: 76% of travelers planning to travel in the next six months now report changing plans due to coronavirus (up from 69% two weeks ago).

IMMEDIATE PLANS FOR U.S. TRAVELERS

There was potentially more positive news on immediate travel plans in the next six weeks. The proportion of U.S. travelers not planning travel over that period dropped from late May at 40% to 34%. However, much of this change was a rise in U.S. travelers who are undecided on what they should do. There was no significant change in specific travel plans but visiting friends and relatives by car still leads as the most popular first trip through mid-August.

PERCEPTION OF TRAVEL & SAFETY

There was a clear drop in U.S. traveler confidence starting with the local community. As of early July, support for opening local communities to visitors has dropped to 34%, the lowest level since mid-May. The percentage of American travelers who now feel safe traveling outside their community has fallen to 41% which is the lowest point since mid-May. The percentage of Americans comfortable with dining in local restaurants and shopping in local stores also declined from 47% two weeks ago to 40% in the most recent survey. For the recovery to start with locals we need this trend to reverse and to grow to a clear majority of Americans.

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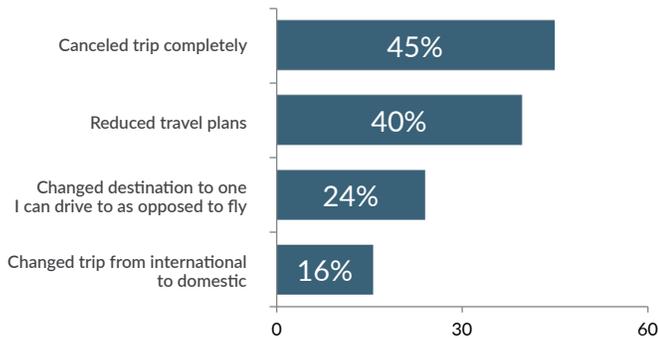
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TRAVEL PLANS

With the summer travel season now in full swing, the modest but cautious gains through May and June have stalled or reversed with the surge of COVID-19 cases across most of the U.S. One indicator to note, the percent of U.S. travelers who have reduced their travel plans dropped from 45% in late June to 40%

HOW DID YOU CHANGE YOUR PLANS?



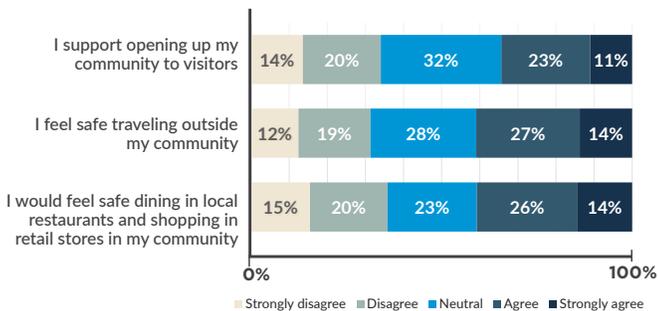
76%

of U.S. travelers indicate they will change their travel plans in the next six months due to COVID-19, a sharp rise from late June (69%) and back to levels last seen in late May.

CONFIDENCE IN TRAVEL & TRAVELERS

There was a clear drop in U.S. travelers' confidence in traveling outside their community, opening up their community to visitors or dining and shopping locally. Of most concern, the percentage of U.S. travelers in support of opening their community to travel declined further to 34% (down from 41% two weeks ago) as a result of rising COVID-19 case numbers in many parts of the nation. Also concerning, the proportion of U.S. travelers feeling confident dining or shopping in their local community dropped from 47% in late June to 40%.

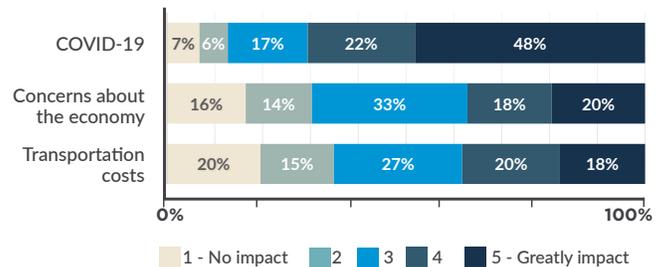
PERCEPTIONS OF SAFETY AND TRAVEL



FACTORS IMPACTING TRAVEL

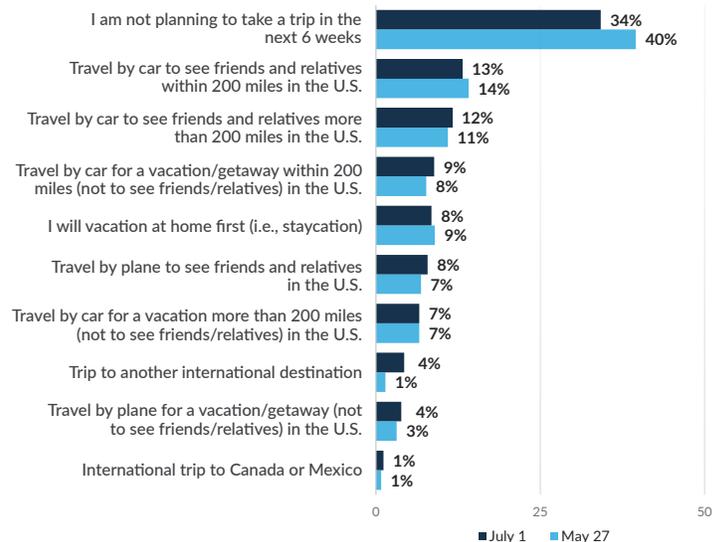
COVID-19's impact on travel plans ticked up slightly from two weeks ago with 48% of U.S. travelers indicating it was "greatly impacting" travel, still well down from 60% in mid-May. One bright spot, the economic impact of COVID-19 remains modest with only 20% of U.S. travelers citing major concerns about the economy influencing their travel plans over the next six months.

FACTORS IMPACTING DECISIONS TO TRAVEL IN THE NEXT SIX MONTHS



IMMEDIATE TRAVEL PLANS

The percent of U.S. travelers not planning travel in the next six weeks dropped to 34% in early July from 40% in late May. However much of this drop is due to travelers being "undecided," highlighting rising caution and uncertainty amongst U.S. travelers. VFR travel by car remained the most popular first trip followed by leisure travel by car. One interesting change - the proportion of US travelers planning an international trip in the next six weeks quadrupled, albeit from just 1%.



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