The Coronavirus & Travel

Advance Wave 1 Insights
Project #19518
March 2020

Omnitrak
UNEARTH AHA! INSIGHTS. MASTER YOUR MARKET.
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Research Objectives

The primary research objective of the study is to provide marketing insights into potential changes in travel behavior as well as marketing direction in the short term. More specifically:

- To understand travel plan changes and assess the scope of impact, as well as, the who, what and why behind the changes.
- To assess whether an original destination choice will be displaced by a new destination.
- To garner insights into the impact of the coronavirus pandemic on trip timing and travel perceptions.
- To identify what information needs travelers have, and how and what will most resonate with travelers.

Statistical Analysis -- Within the reports' graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. insurers or attributes) in the <u>same year</u> at the 95% level of confidence.

An arrow ↑ or ↓ indicates a statistically significant difference when ratings are compared <u>across years</u> at the 95% confidence level.

Methodology

The Coronavirus & Travel study was conducted via an online survey methodology using a sample of 2,505 U.S. adult travelers from a professionally-managed consumer panel.

Field Dates: March 10 through 12, 2020.

Respondents were all screened as:

- Adults (18+) who traveled for leisure or business travel purposes at least once in the past 12 months.
- Aware of coronavirus/COVID-19

Key Recommendations & Takeaways

What's the Big Idea?

1 As the U.S. travel industry grapples with the unprecedented effects of the COVID-19 coronavirus pandemic, U.S. travelers have dramatically altered their travel plans in a marked shift from behaviors in reaction to past disease outbreaks and natural disasters. In the face of prior health epidemics, more than eight (83%) in 10 travelers did not change their travel plans, while 17 percent did.

2 However, COVID-19 concerns have rattled travelers unlike any other world event in recent history. Among past year travelers (i.e., people who have traveled at least once in the past 12 months), just less than half (49%) intend to travel in the next six months (i.e., between March and the end of August 2020), and just over half (51%) do not presently have plans to travel during the period in question.

3 The need to take a break away from everyday life, to reconnect with others, to explore and do new things is seemingly hardwired into the core DNA of U.S. travelers (…perhaps now more than ever). Despite the unprecedented shock to the market, this foundational desire to travel will eventually fuel a recovery in the marketplace. However, before the seeds of recovery can even begin to take root, Traveler Confidence will need to be nurtured.

Key Recommendations & Takeaways

1 ***Unlike prior health epidemics and world events, the coronavirus has had an unprecedented impact on the U.S. travel and tourism industry***

As the U.S. travel industry grapples with the unprecedented effects of the COVID-19 coronavirus pandemic, U.S. travelers have dramatically altered their travel plans in a marked shift from reactions to past disease outbreaks and natural disasters. In the face of prior health epidemics, natural disasters and other world events, U.S. travelers have demonstrated the strength and resilience of their travel demand. More than eight (83%) in 10 travelers did not change their travel plans in the face of prior health pandemics, while 17 percent did.

However, COVID-19 concerns have rattled travelers unlike any other world event in recent history. Among past year travelers (i.e., people who have traveled at least once in the past 12 months), just less than half (49%) intend to travel in the next six months (i.e., between March and the end of August 2020), and just over half (51%) do not presently have plans to travel during the period in question.

Americans across the country this week (week of March 16, 2020) have experienced further unprecedented shocks to their daily lives, including government advisories to halt all discretionary travel for 15 days or perhaps longer, reduced retail hours, suspension of dining-in options, recommended restrictions on social gatherings completely, etc. The impact of the latest shock to the consumer psyche and associated travel demand remains to be seen and will be assessed in ensuing waves of Omnitrak's COVID-19 research.

2 ***Despite the unprecedented shock to the market, the foundational desire to travel will eventually fuel a recovery. However, Traveler Confidence will need to be nurtured.***

The need to take a break away from everyday life, to reconnect with others, to explore and do new things is seemingly hardwired into the core DNA of U.S. travelers (…perhaps now more than ever). Despite the unprecedented shock to the market, this foundational desire to travel will eventually fuel a recovery. However, before the seeds of recovery can even begin to take root, Traveler Confidence will need to be nurtured. Strengthening Traveler Confidence requires gaining an understanding of travelers' areas of perceived COVID-19 risk, as well as, the types and sources of information which will help travelers regain confidence in the safety of travel.

While many factors in rebuilding this confidence are outside of a destination's/travel provider's control (e.g., reduce the number of reported COVID cases at a destination, develop a vaccine), there are some actions that the travel industry can take to strengthen Traveler Confidence:

- Improve the timeliness and reliability of COVID-19 information available to travelers.
- Integrate travel advice from national and state health officials into communications.
- Ensure that accurate, timely COVID-19 testing is available at the destination.
- Uphold health/safety standards and enhance sanitation to prevent infections.

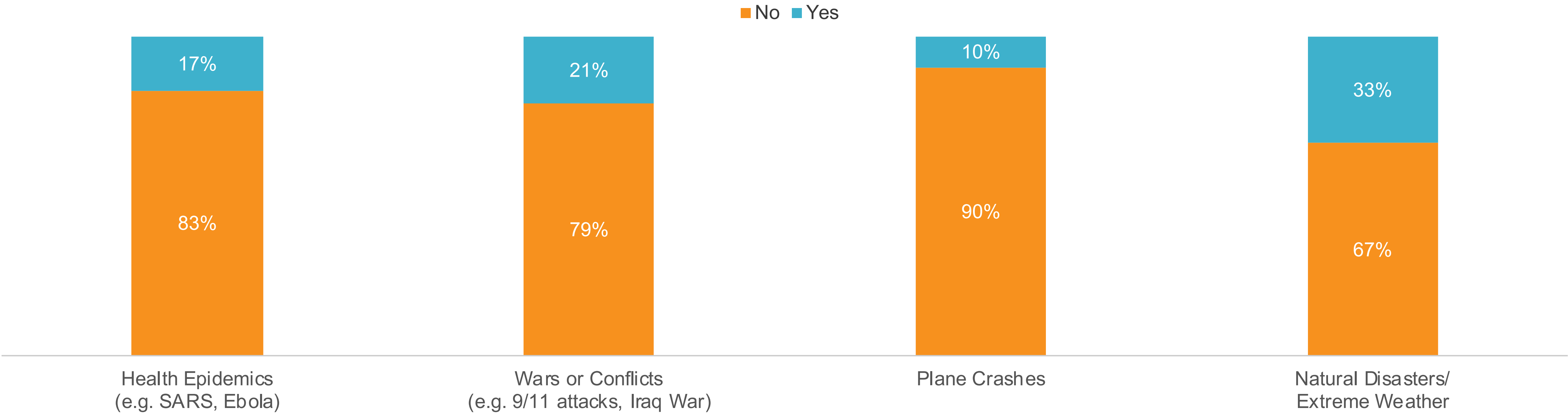
Executive Summary

Executive Summary

As the U.S. travel industry grapples with the unprecedented effects of the COVID-19 coronavirus pandemic, U.S. travelers have dramatically altered their travel plans in a marked shift from reactions to past disease outbreaks and natural disasters.

In the face of prior health epidemics, natural disasters and other world events, U.S. travelers have demonstrated the strength and resilience of their travel demand. More than eight (83%) in 10 travelers did not change their travel plans in the face of prior health epidemics, while 17 percent did. By comparison, natural disasters/extreme weather were found to have the greatest impact on travelers' previous travel plans.

Past Crises Impact on Travel Plans



Q12. Have you ever changed travel plans for any of the following reasons? Base: 2,505

Executive Summary

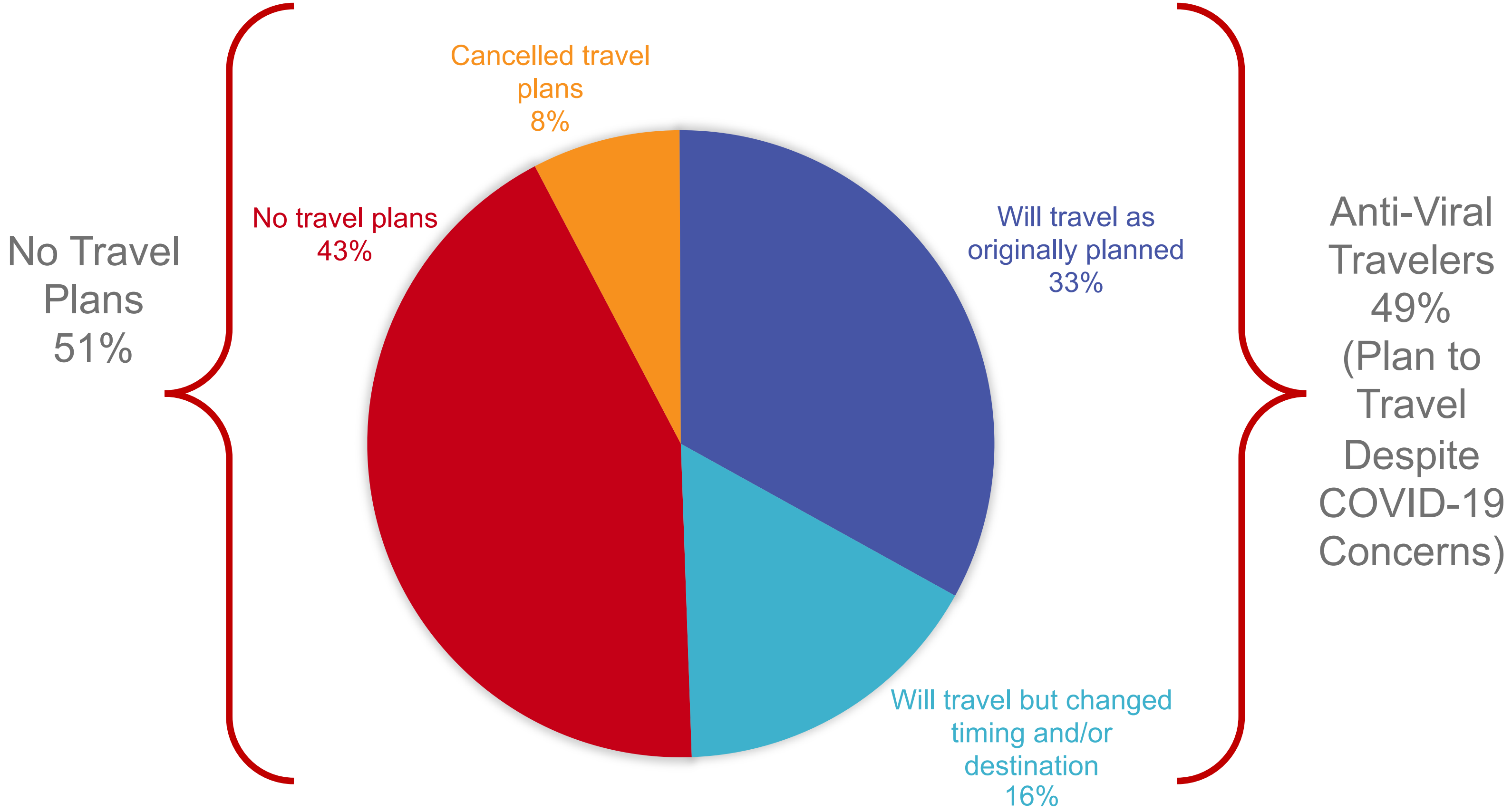
Coronavirus Concerns Impact Near-Term Leisure & Business Travel Plans

Bolstered by this resilience, the initial shocks created by news and reported cases of coronavirus were absorbed by U.S. travelers to a certain degree

According to Omnitrak's first wave of COVID-19 research fielded from March 10th to 12th, 29 percent of travelers had cancelled a leisure trip since the start of the year. However, looking forward, the rate of leisure trip cancellations tapered to 8 percent for travel in the next six-month period between March and August, albeit in a market of declining forward bookings.

Meanwhile, the Wave 1 results indicated that just under half (49%) of past year travelers possessed travel intentions for the next six months through the end of summer, of which about two-thirds intended to travel as originally planned and one-third had made changes to the timing and/or destination of their intended trip.

COVID-19 Impact on Leisure Travel Plans for Travel, March through August 2020



Q1a. Considering your leisure or business travel planned over the next 6 months, specifically March 2020 through August 2020, which of the following statements best describes your travel plans? [Select One]. Base: 2,505

Executive Summary

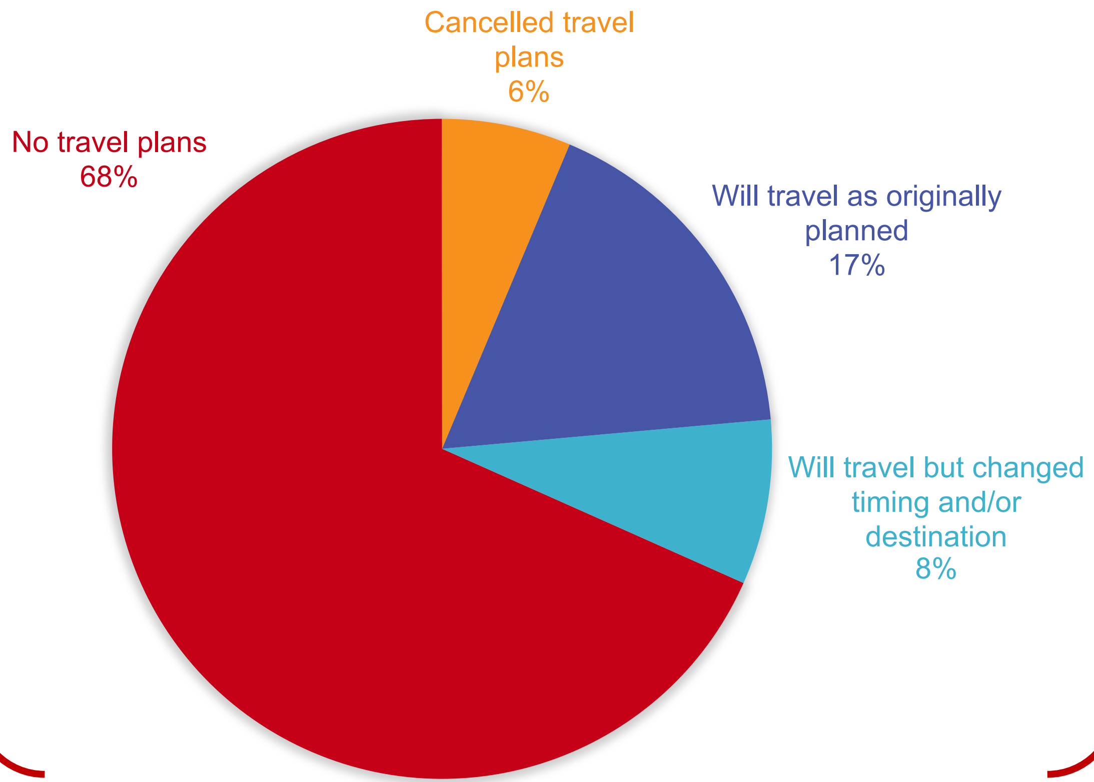
By comparison, only a quarter (25%) of past year travelers intend to travel for business purposes between March and August (i.e., compared to 49% of leisure travelers).

While cancellation of business trips during the period in question (6%) has been low, the majority (68%) of past year travelers presently did not have plans to travel on business during the period in question.

Among those travelers with business travel plans, about two-thirds intend to travel as they originally intended, and one-third have changed the timing and/or destination of their intended business trip.

No Travel Plans 75%

COVID-19 Impact on Business Travel Plans for Travel, March through August 2020



Anti-Viral Travelers 25% (Plan to Travel Despite COVID-19 Concerns)

Q1a. Considering your leisure or business travel planned over the next 6 months, specifically March 2020 through August 2020, which of the following statements best describes your travel plans? [Select One]. Base: 2,505

Executive Summary

The Road Ahead - Nurturing Traveler Confidence

The need to take a break away from everyday life, to reconnect with others, to explore and do new things is seemingly hardwired into the core DNA of U.S. travelers. Despite the unprecedented shock to the market, this foundational desire to travel will eventually fuel a recovery. However, before the seeds of recovery can even begin to take root, Traveler Confidence will need to be nurtured. Strengthening Traveler Confidence requires gaining an understanding of travelers' areas of perceived COVID-19 risk, as well as, the types and sources of information which will help them regain confidence in the safety of travel.

Sources and Types of Information

Timeliness & Reliability: When it comes to making travel decisions, U.S. travelers are not particularly satisfied with the Timeliness (mean score, 6.7) or the Reliability (6.5) of the coronavirus information currently available to them. Improving the reliability of COVID-19 information as it relates to travel and providing this information to travelers on a more-timely basis can play a key role in strengthening Traveler Confidence on the road ahead.

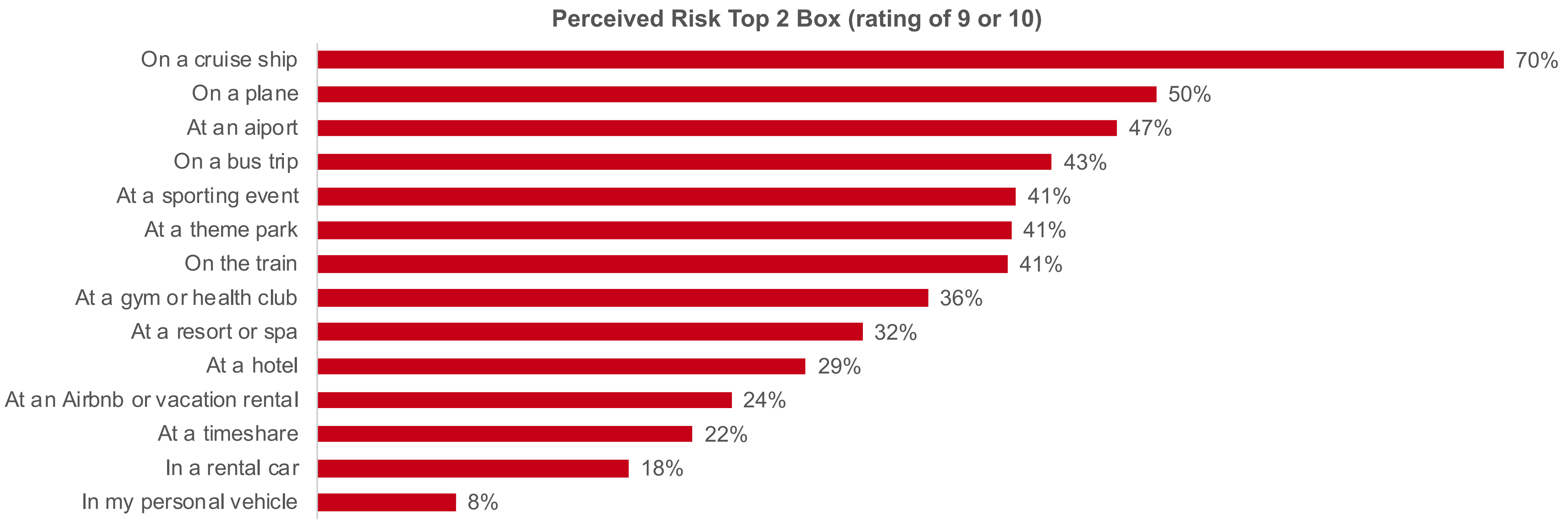
Sources of Information: While national and local elected officials have often taken it upon themselves to become the lead spokespersons for coronavirus updates, travelers actually place more importance on travel advice from national (59%) and state (49%) health officials/scientists, as well as travel advice from their own doctors (50%). Other pieces of information considered of higher importance in travel decisions include the number of COVID-19 cases reported at a destination (57%), and an airlines' reputation for upholding health standards (35%).

Factors to Consider in Regaining Traveler Confidence: While many factors in regaining Traveler Confidence are outside of a destination's/travel provider's control (e.g., reducing the number of reported COVID-19 cases, developing a vaccine), there are some actions that the travel industry can take to strengthen Traveler Confidence. These include providing travelers with real-time coronavirus information; making accurate coronavirus testing available at the destination; and enhancing the destination's/place's sanitation practices to prevent infections.

Executive Summary

Areas of Perceived Risk

While travel increases one's risk of exposure to the coronavirus, certain elements of the overall travel experience are perceived as possessing a greater risk of infection than others. Enclosed spaces with large numbers of passengers are believed to be the travel experiences of greatest risk, including cruise ships (70%), planes (50%), airports (47%) and bus trips (43%). By comparison, personal vehicles (8%) are considered the means of transportation with the lowest risk and may be the most popular means of travel in the near term.



Q10. In your opinion, how much of a risk for infection to the Coronavirus/COVID-19 do the following pose for someone like yourself? [10-point scale from Not at all a risk (1) to Very serious risk (10)]

Executive Summary

Wave One – A Benchmark Reading of an Industry in Transition

Since the March 10th through 12th fielding of this first wave of COVID-19 research, Americans across the country this week (week of March 16, 2020) have experienced further unprecedented shocks to their daily lives, including government advisories to halt all discretionary travel for 15 days or perhaps longer, reduced retail hours, suspension of dining-in options, recommended restrictions on social gatherings, etc.

The impact of the latest shock to the consumer psyche and associated travel demand remains to be seen and will be assessed in the ensuing waves of Omnitrak's COVID-19 research.

Detailed Findings

Changing Travel Plans

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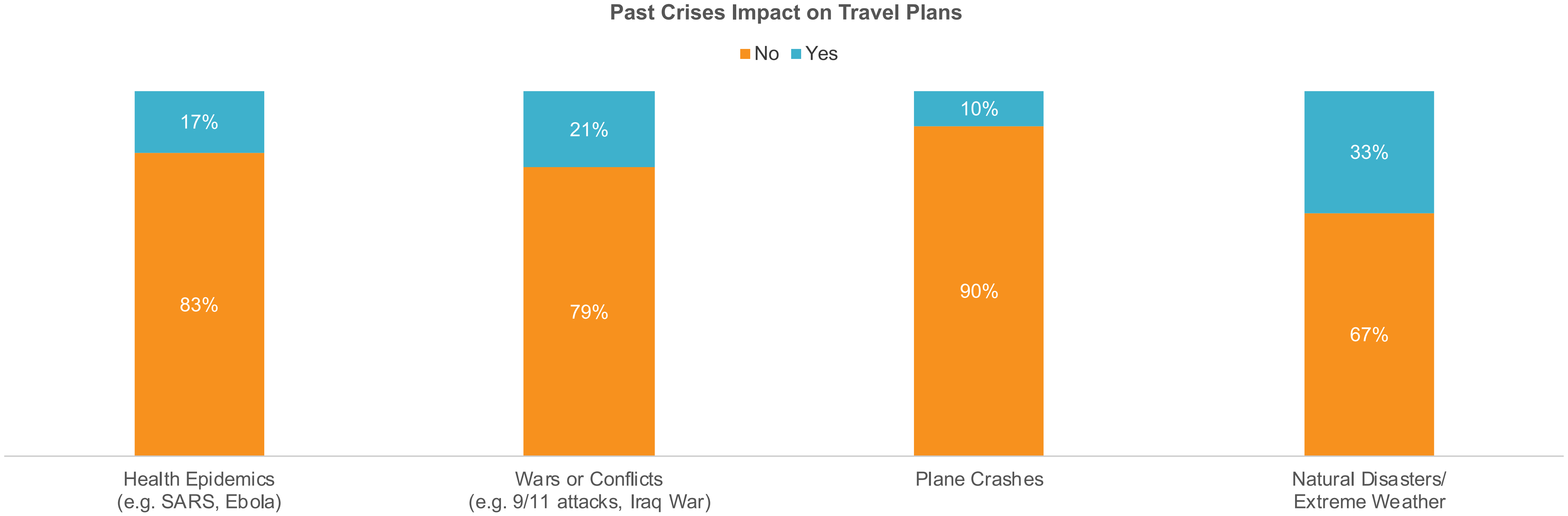
U.S. Travelers Prove Resilient to Prior Health Epidemics

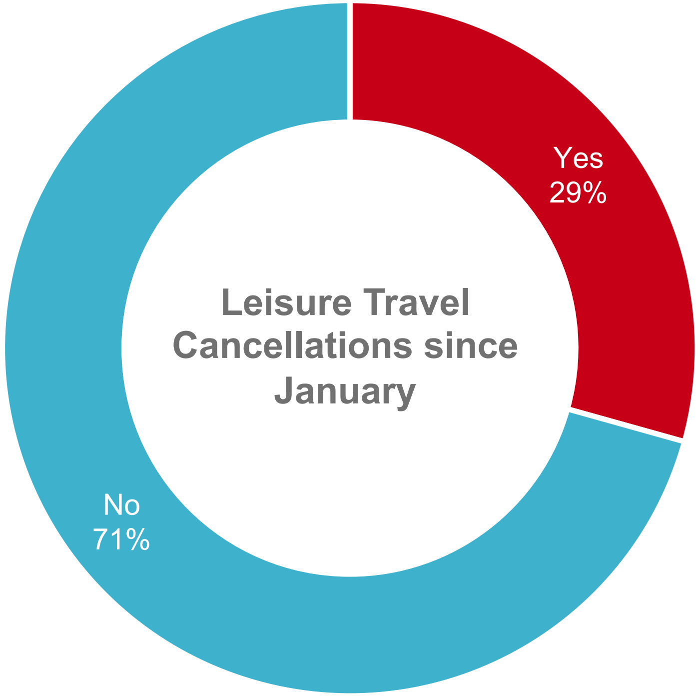
U.S. travelers have proved largely resilient, continuing to travel through prior health epidemics and world events. More than eight (83%) in 10 travelers did not change their travel plans in the face of prior health pandemics, while 17 percent did. By comparison, natural disasters/extreme weather were found to have the greatest impact on travelers' previous travel plans.

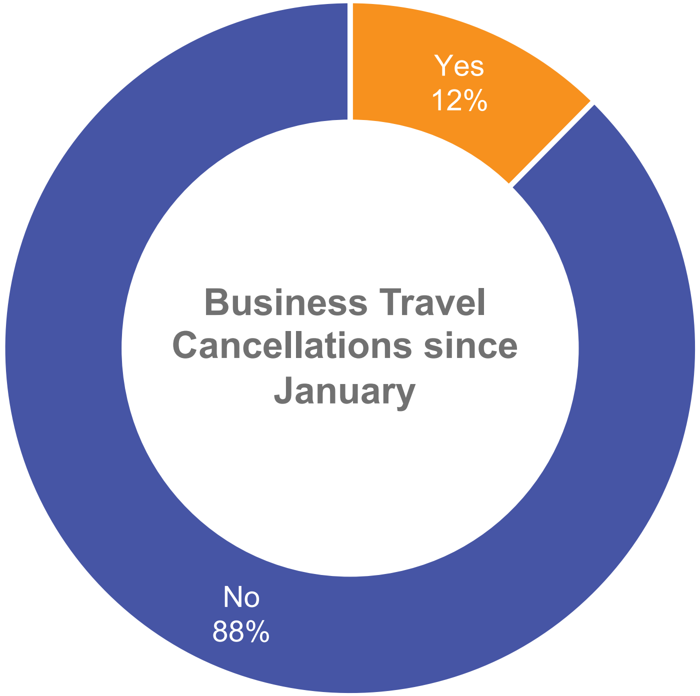


Q12. Have you ever changed travel plans for any of the following reasons? Base: 2,505

U.S. Travelers Launch into 2020 with Trip Cancellations

Among past year travelers (i.e., people who have traveled at least once in the past 12 months), just over a quarter (29%) have cancelled leisure travel and more than one-in-10 (12%) have cancelled business travel since January. Looking ahead into the next six months, the rate of leisure (8%) and business (6%) cancellations for travel from March through August has eased [see pages 19 and 20), albeit as forward bookings have eased as well.



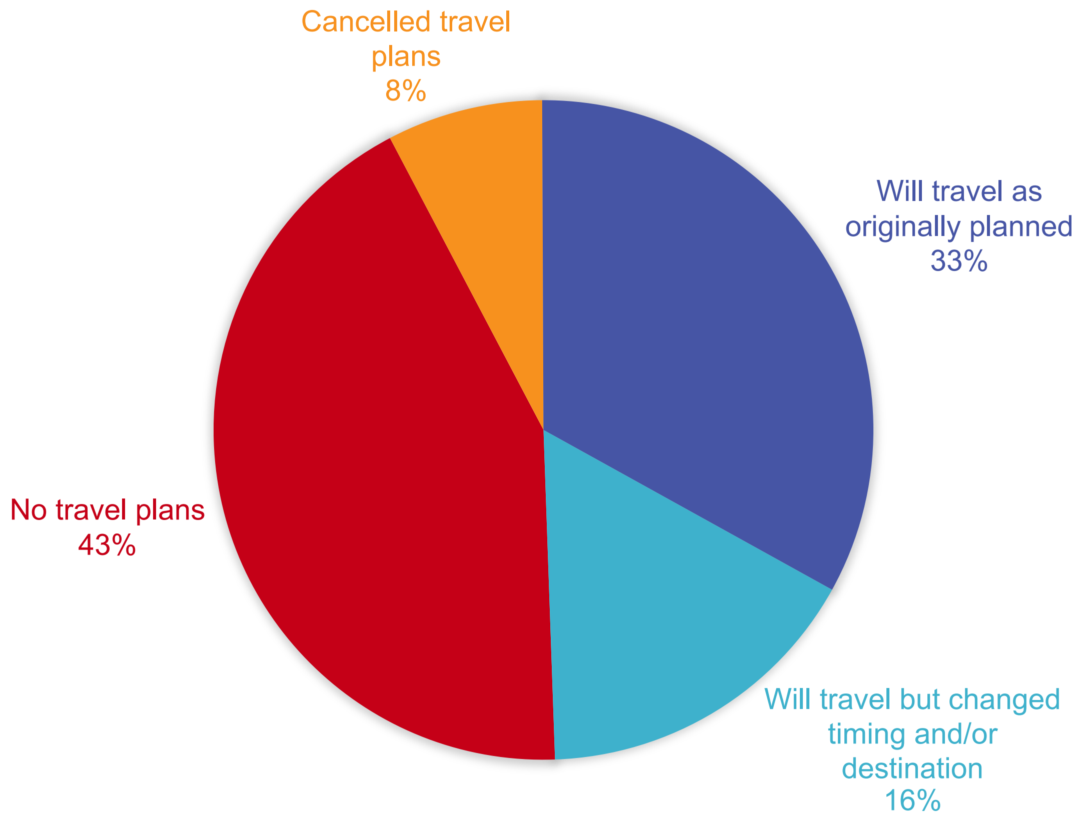


QE. Since January 2020, have you cancelled any leisure or business-related travel? Base: 2,505

COVID-19 Impacts Spring/Summer **Leisure** Travel Plans

Among past year travelers (i.e., people who have traveled at least once in the past 12 months), just less than half (49%) intend to travel for leisure purposes in the next six months (i.e., between March and the end of August 2020), and just over half (51%) do not presently have plans to travel during the period in question. Among those travelers with travel plans, about two-thirds intend to travel as they originally intended, and one-third have changed the timing and/or destination of their intended trip.

No Travel Plans
51%



Anti-Viral Travelers
49%
(Plan to Travel Despite COVID-19 Concerns)

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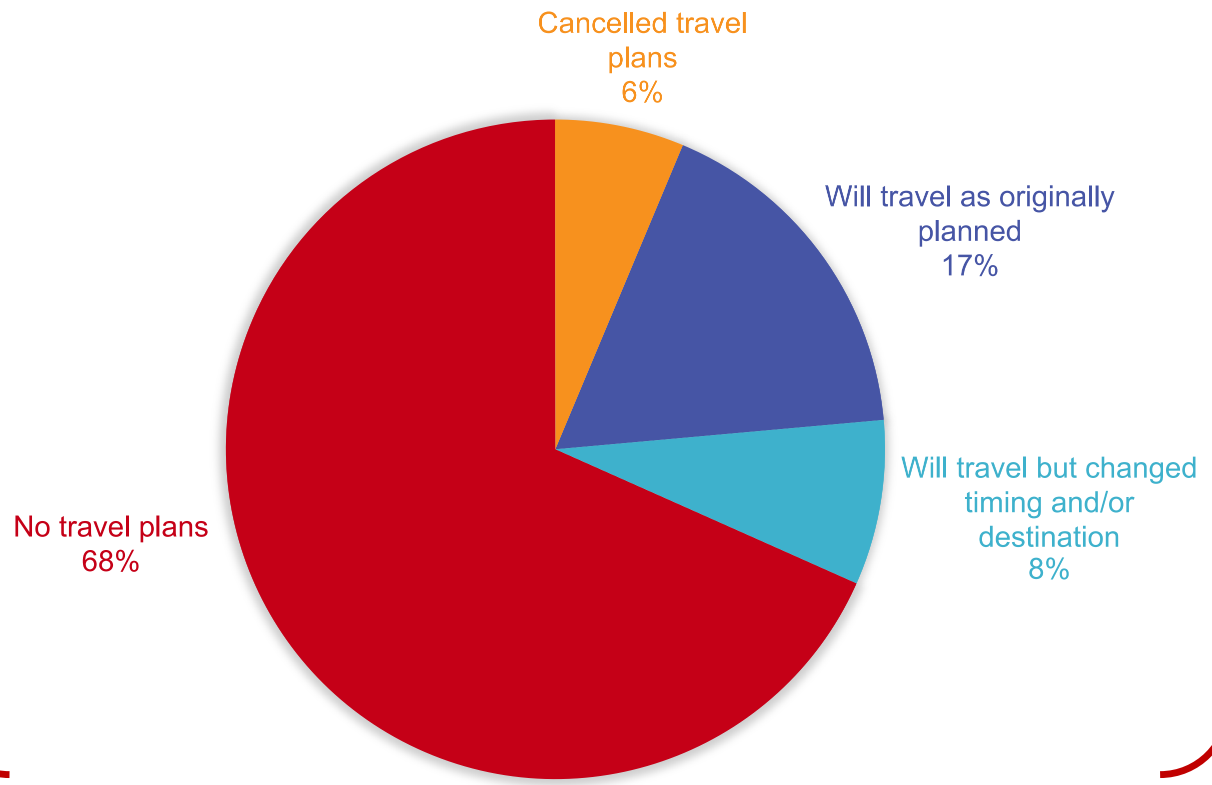
Q1a. Considering your leisure or business travel planned over the next 6 months, specifically March 2020 through August 2020, which of the following statements best describes your travel plans? [Select One].
Base: 2,505

COVID-19 Impacts Spring/Summer **Business** Travel Plans

Among past year travelers (i.e., people who have traveled at least once in the past 12 months), only a quarter (25%) intend to travel for business purposes in the next six months (i.e., between March and the end of August 2020), and over two-thirds (68%) do not presently have plans to travel on business during the period in question. Among those travelers with travel plans, about two-thirds intend to travel as they originally intended, and one-third have changed the timing and/or destination of their intended business trip.

No Travel Plans
75%



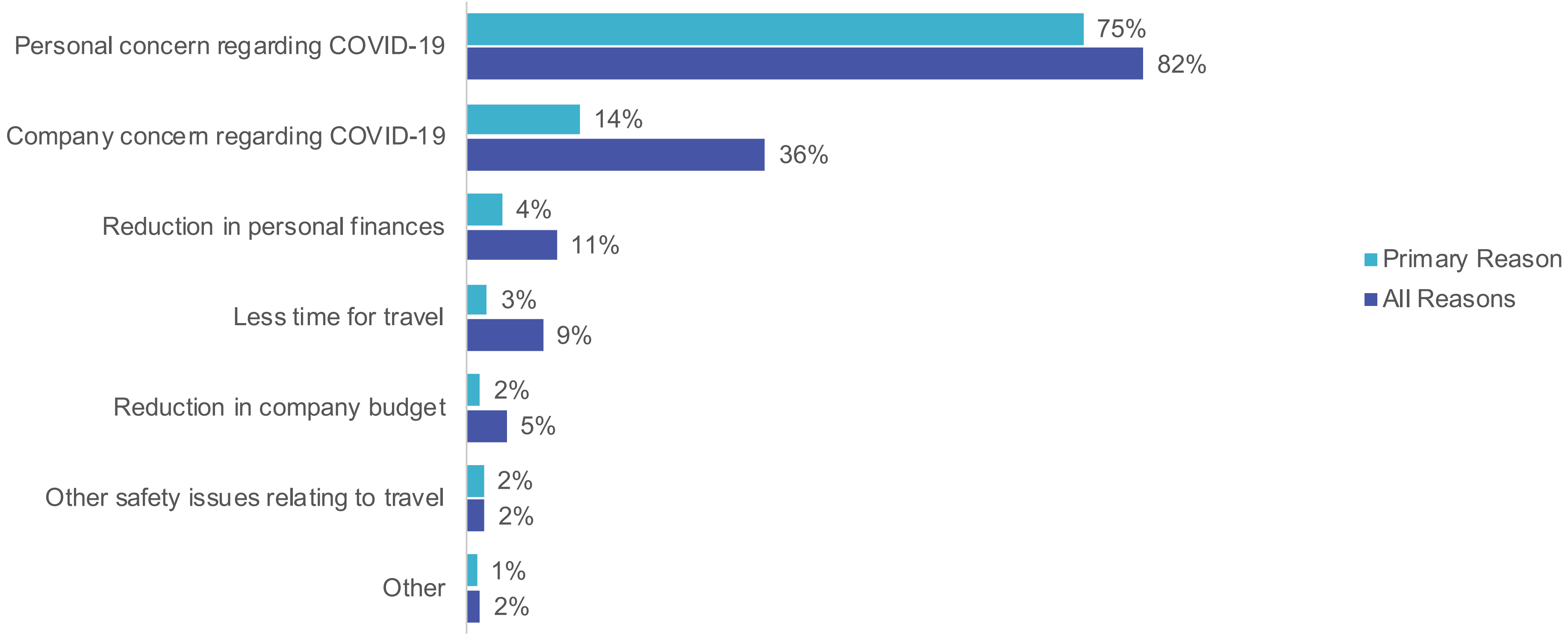
Anti-Viral Travelers
25%
(Plan to Travel Despite COVID-19 Concerns)

Q1a. Considering your leisure or business travel planned over the next 6 months, specifically March 2020 through August 2020, which of the following statements best describes your travel plans? [Select One].
Base: 2,505

Reasons for Leisure Travel Plan Changes: COVID-19 Tops the List

Not too surprisingly, personal (75%) and company (14%) concerns regarding the coronavirus were the primary reasons cited for cancelling and changing leisure travel plans during the next six months. Nonetheless, when asked to cite all reasons for the cancellations and changes, a reduction in personal finances (11%) and less time for travel (9%) also surfaced as reasons for changes to respondents' travel plans.

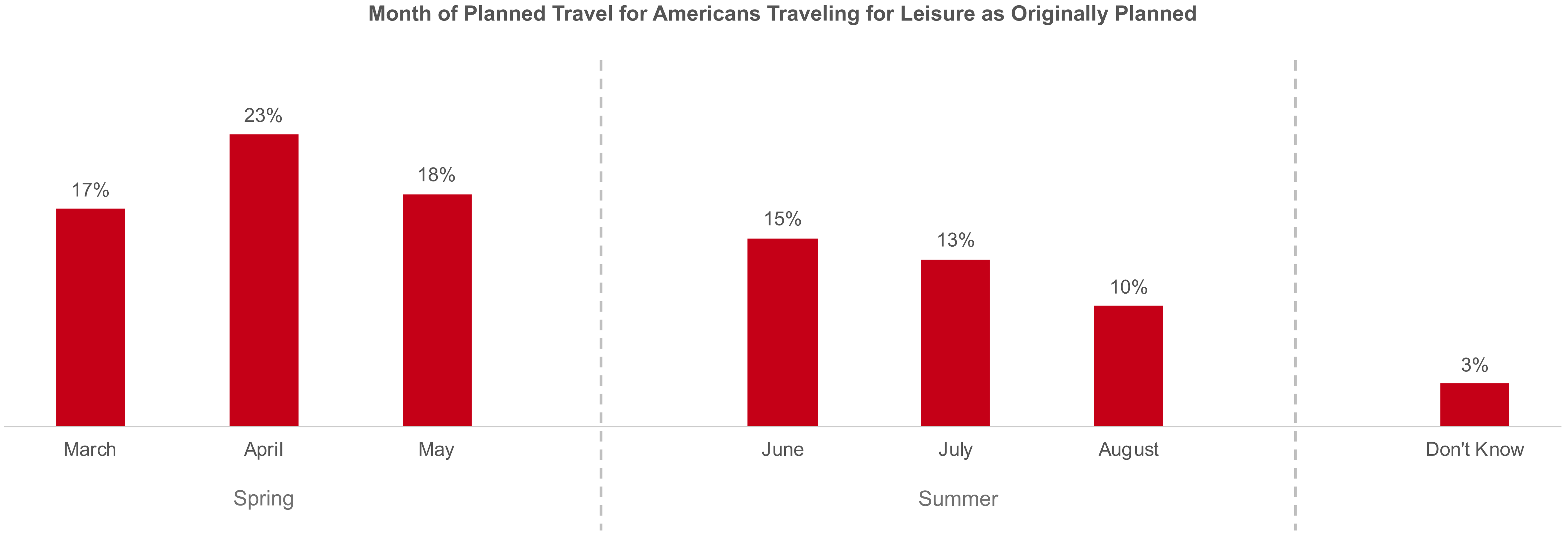
Reasons Cancellations and/or Changes to Planned Leisure Trip(s) in 2020



Q2ab. Please indicate why you have cancelled and/or made changes to your leisure trip(s) planned for 2020. Please select all that apply. Of those selected, which is the primary reason you have cancelled and/or made changes to your leisure trip(s)? Base: 602

Spring Trips Popular Among Americans Traveling as Originally Planned

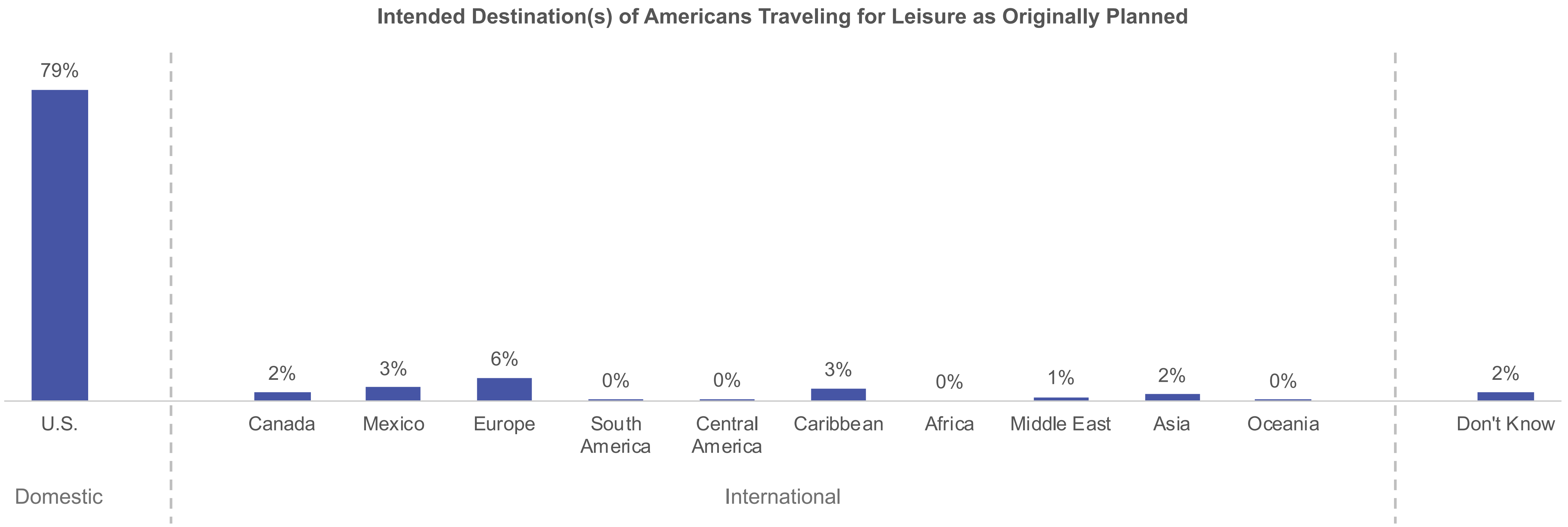
Among past year travelers (i.e., people who have traveled at least once in the past 12 months) who intend to travel in the next six months without any changes to their original plans (i.e., no impact from COVID-19 concerns), more than half (59%) are taking to the roads/skies in the spring (March - May) and 38 percent intend to travel in the summer (June – August). A small number (3%) are not yet sure of when they plan to travel.



Q3a. Still considering your planned trips between March and August 2020, in what month are you planning to travel? If you have multiple trips planned, please indicate the month of the closest trip to today's date.
Base: 829

Domestic Travel Dominates Among Americans Traveling as Originally Planned

Domestic U.S. destinations (79%) dominate the travel plans of travelers who have not made changes to their travel itineraries, and plan to move forward with trips to the destinations they had originally planned to visit. Travel plans to visit Europe (6%), the Caribbean (3%) and Mexico (3%) follow, but at quite a distance behind the U.S.



Q4a. Still considering your planned trips between March and August 2020, where are you planning to travel? If you have multiple trips planned, please indicate the destination of the closest trip to today's date. Base: 829

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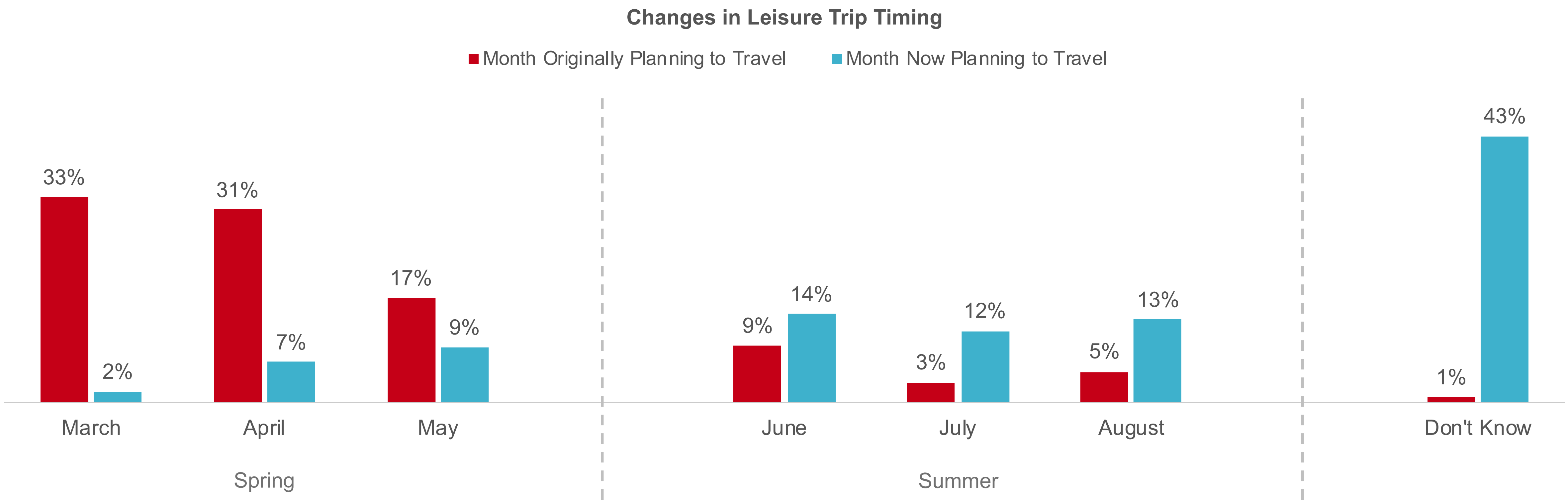
Trips Originally Planned for Spring Postponed until Summer, Possibly Later

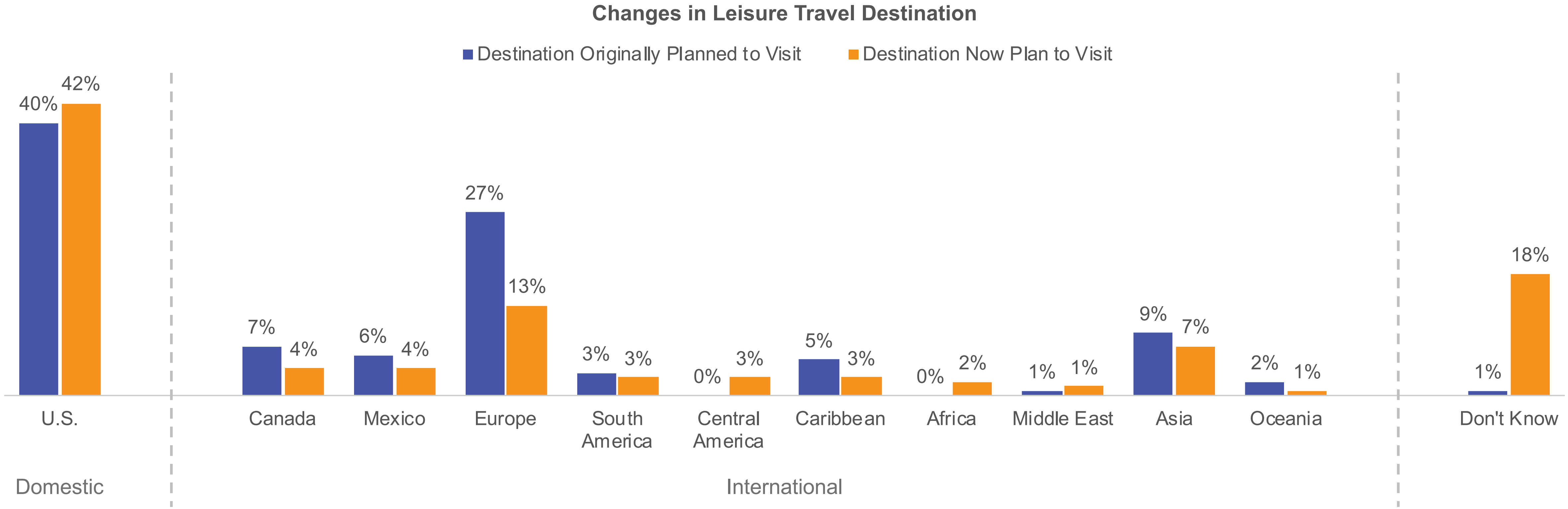
As a sign of the uncertainty prevalent in the marketplace, travelers have postponed their original spring travel plans until the summer, and possibly beyond. Among travelers who postponed travel plans, eight-in-10 (82%) of the trips planned were originally scheduled to occur in the spring (March through May). While 39 percent of the rescheduled trips are now targeting the summer months (June through August), the rescheduled timing of nearly half (43%) of the planned trips remains to-be-determined (i.e., 43% Don't Know).



Q3b. What month were you originally planning to travel and what month are you now planning to travel? If you had multiple trips planned, please indicate the months of the closest trip to today's date. Base: 335

Demand for Domestic Destinations Holds Steady, International Demand Falters

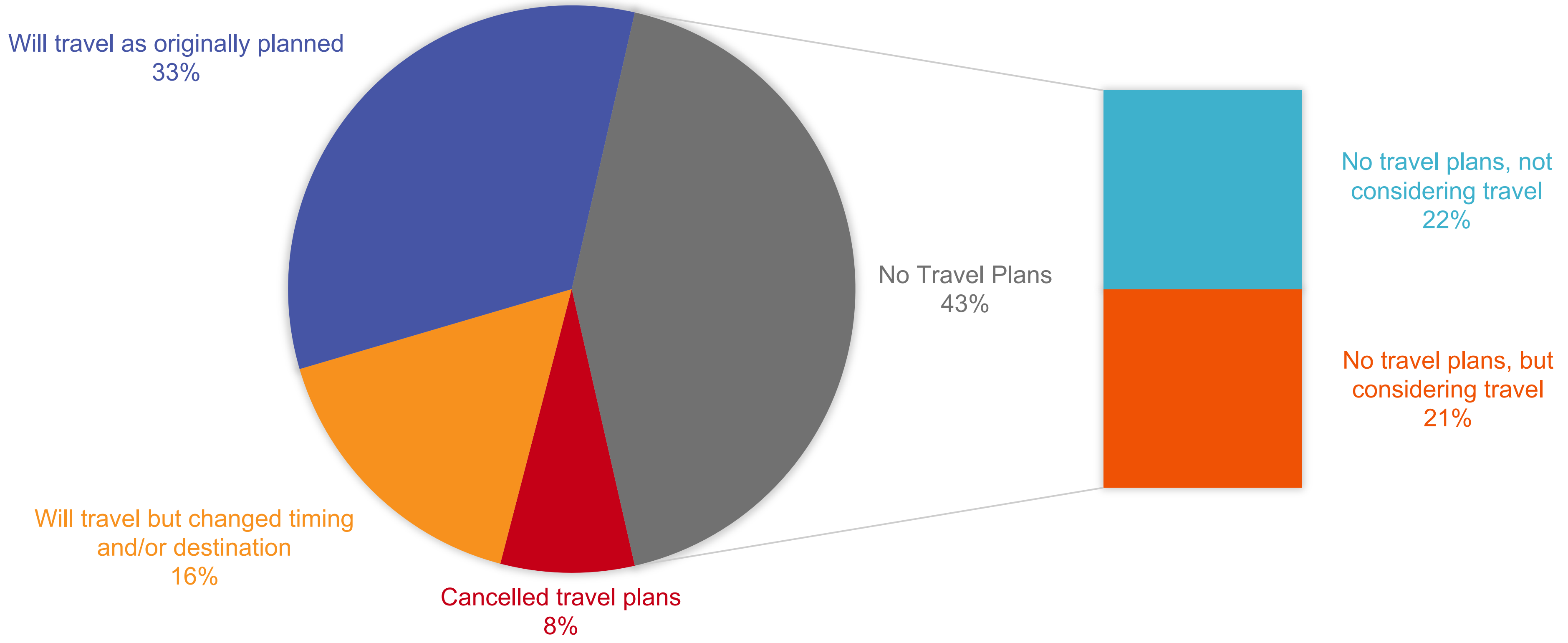
Among travelers who changed the intended destination of their spring/summer travel plans, the U.S. market held its top spot as the most popular destination for both travelers' original (40%) and changed (42%) travel plans. Original travel plans to Europe experienced the largest decrease (27% vs. 13%), even before the Europe travel ban was announced; and the number of travelers who had not selected a new destination (now 18%, Don't Know) posted the largest increase – a further sign of uncertainty in the travel marketplace.



Q4b. Where were you originally planning to travel and where are you now planning to travel to? If you had multiple trips planned, please indicate the destinations of the closest trip to today's date. Base: 154

Half of Travelers without Leisure Travel Plans, Still Might Travel

As noted earlier 43 percent of past year travelers, presently have no plans to travel between March and August. However, it is important to note that half of these ”armchair travelers” reported that they are considering traveling during the spring/summer period in question. It is just that they do not have any specific travel plans in mind yet.



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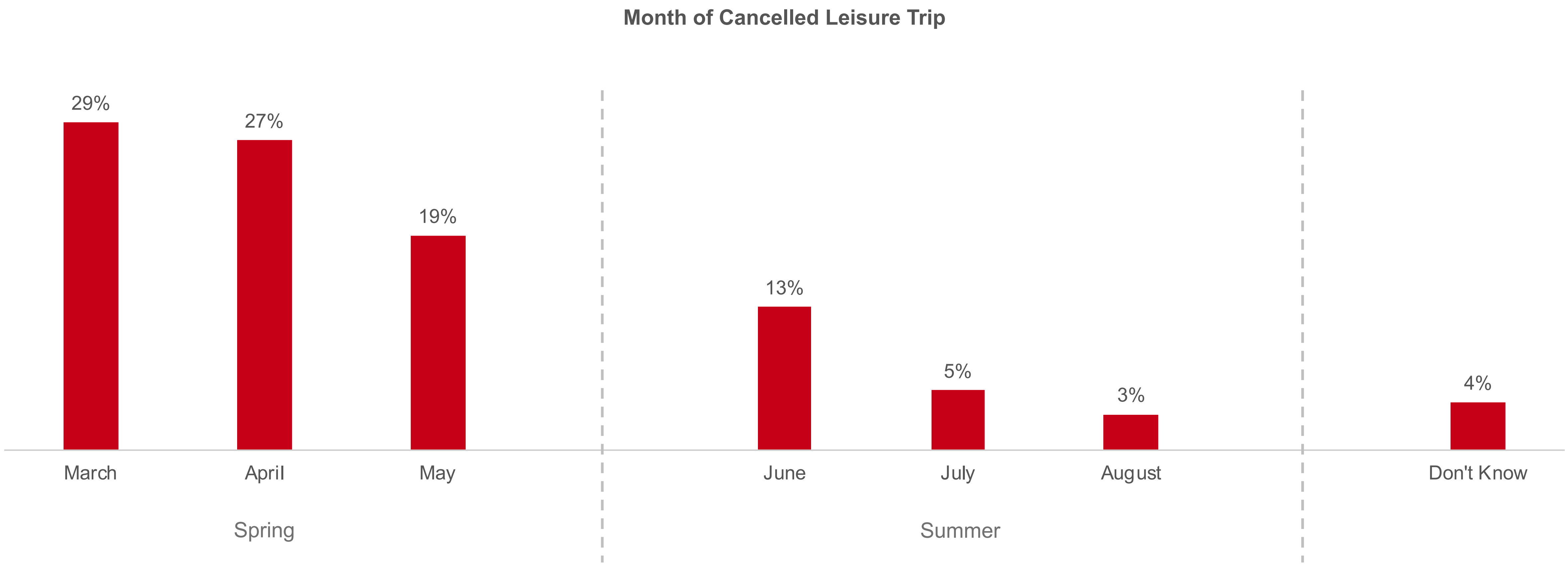
Q1a. Considering your leisure or business travel planned over the next 6 months, specifically March 2020 through August 2020, which of the following statements best describes your travel plans? [Select One].
Base: 2,505

Majority of Trips Cancelled were for Spring Travel

As noted earlier, eight percent of past year travelers have cancelled a leisure trip planned for the period between March and August. About three-quarters (75%) of the trips that were cancelled were originally planned as spring getaways. By comparison, only 21 percent of the cancellations were for further out trips, scheduled for the summer months (June through August).



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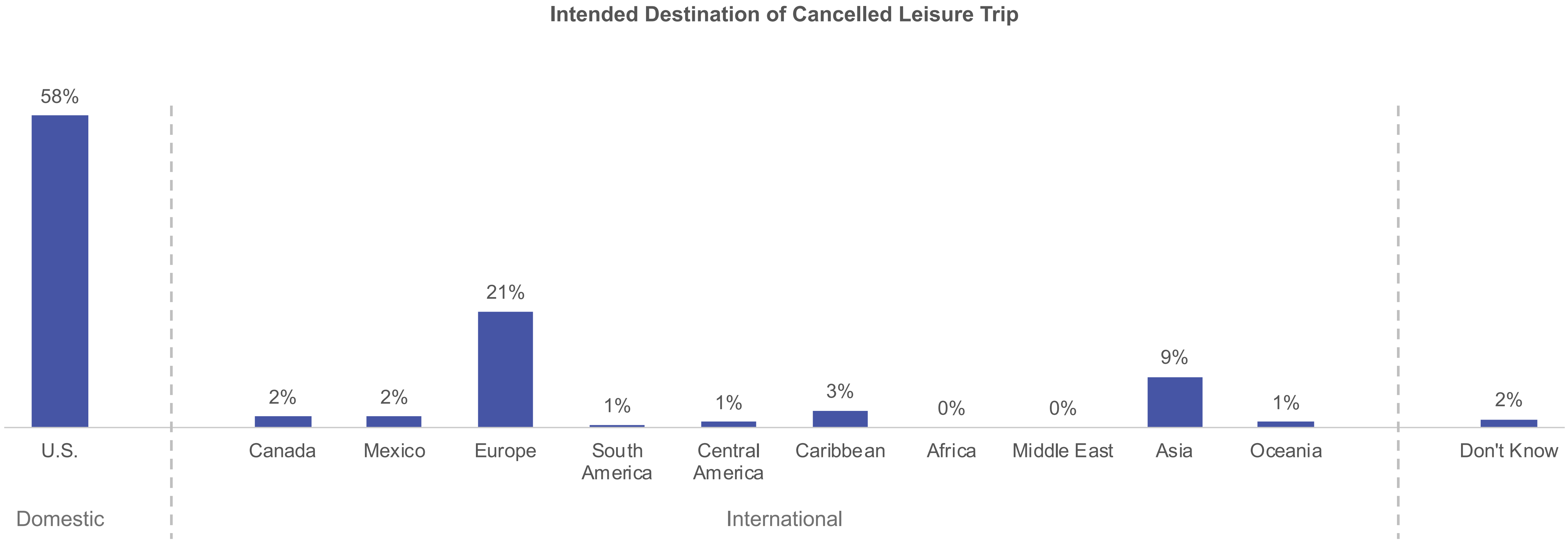
Q3c. What month had you planned to travel? If you had multiple trips planned, please indicate the month of the closest trip to today's date. Base: 191

Domestic U.S., Europe and Asia Top Intended Destinations of Cancelled Trips

As noted earlier, eight percent of past year travelers have cancelled a trip planned for the period between March and August. While many of the trips cancelled involved travel to international destinations (i.e., Europe, 21%; Asia, 9%), the U.S. market accounted for the largest share of cancelled trips (58%).



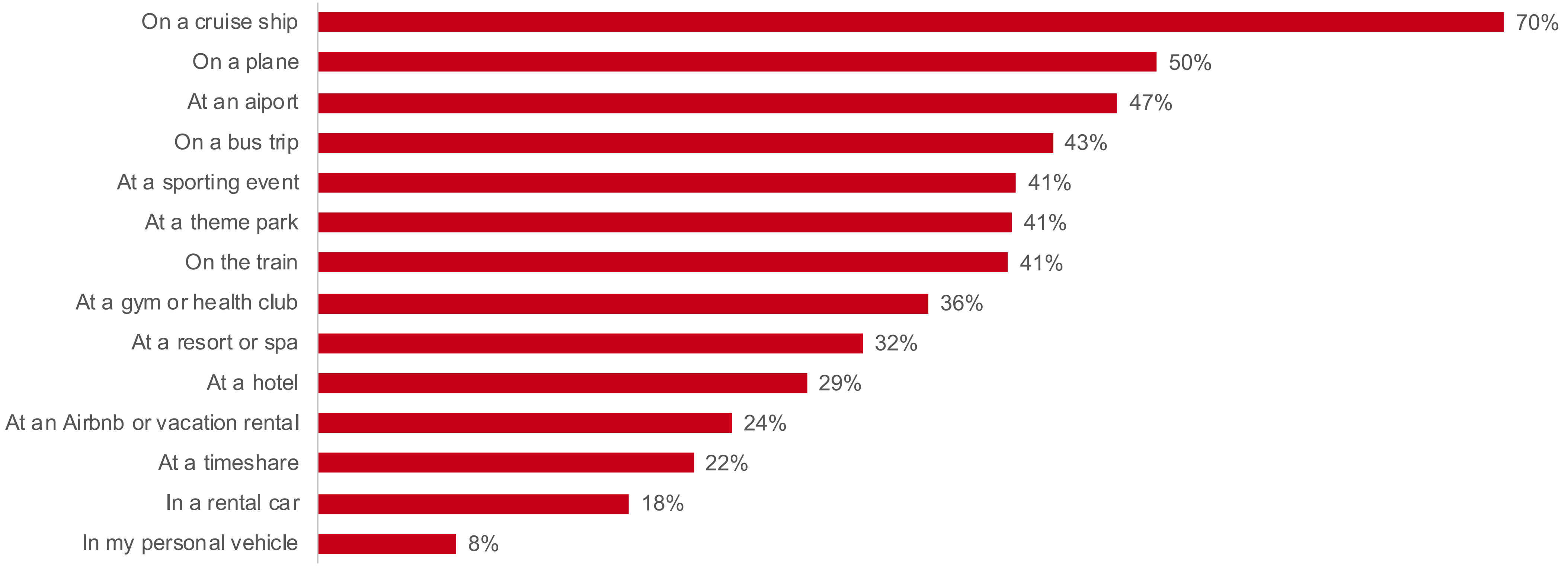
Q4c. Where had you planned to travel? If you had multiple trips planned, please indicate the destination of the closest trip to today's date. Base: 191

Traveler Attitudes, Marketing Communications Insights

Perceptions of Risk of Infection: Cruising & Flying Top List

While travel increases one's risk of exposure to the coronavirus, certain elements of the overall travel experience are perceived as possessing a greater risk of infection than others. Enclosed spaces with large numbers of passengers are believed to be the travel experiences of greatest risk, including cruise ships (70%), planes (50%), airports (47%) and bus trips (43%). By comparison, personal vehicles (8%) are considered the means of transportation with the lowest risk and may be the most popular means of travel in the near term.

Perceived Risk Top 2 Box (rating of 9 or 10)



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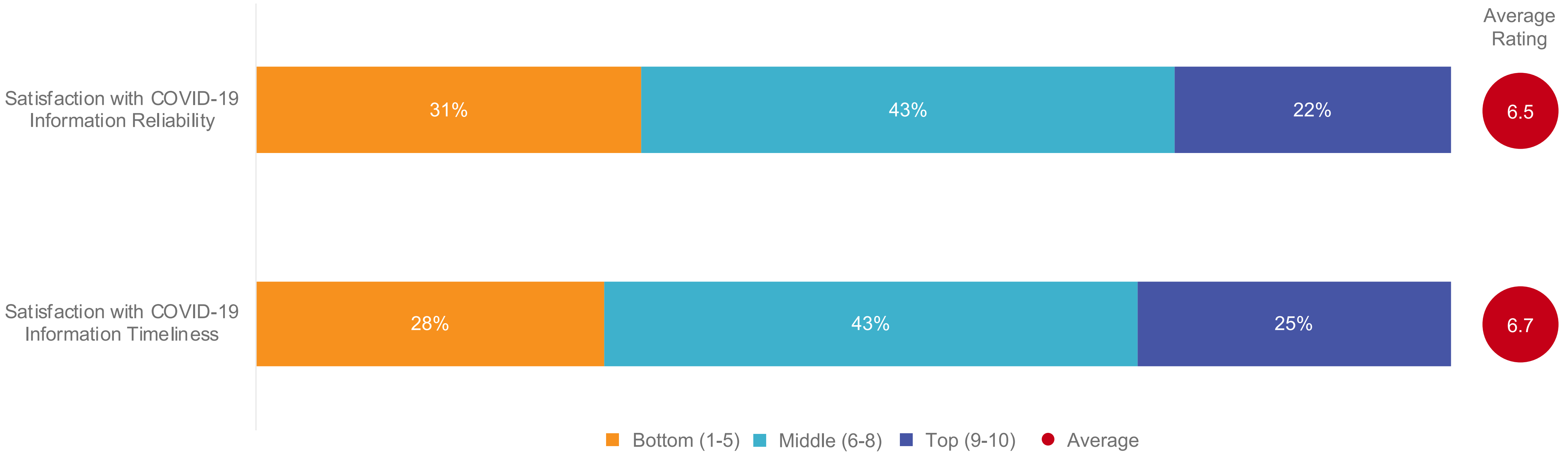
Q10. In your opinion, how much of a risk for infection to the Coronavirus/COVID-19 do the following pose for someone like yourself? [10-point scale from Not at all a risk (1) to Very serious risk (10)] Base: 2,505

U.S. Travelers Not Satisfied with Timeliness/Reliability of COVID-19 Information

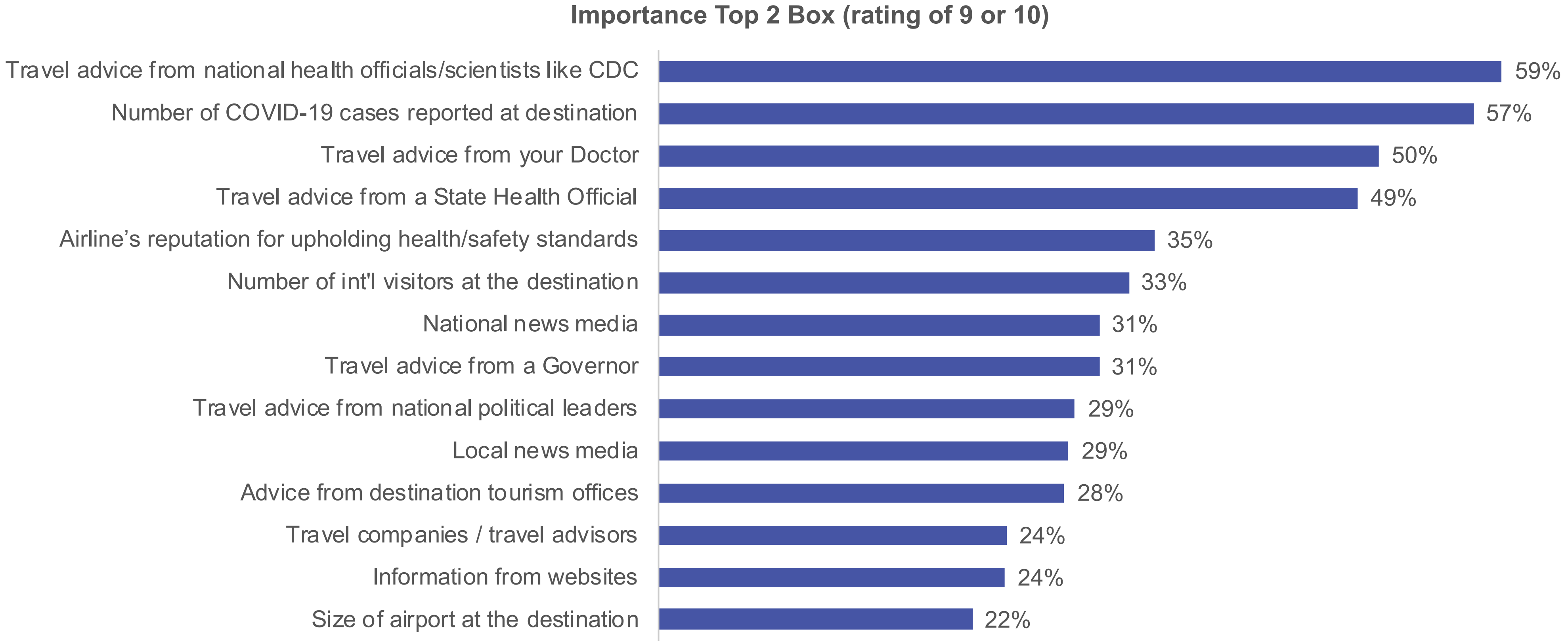
When it comes to making travel decisions, U.S. travelers are not particularly satisfied with the Timeliness (mean score, 6.7) or the Reliability (6.5) of the coronavirus information currently available to them. Improving the reliability of COVID-19 information as it relates to travel and providing this information to travelers on a more-timely basis can play a key role in regaining Traveler Confidence on the road ahead.



Q8. In making decisions about travel, how satisfied are you with the information available to you on Coronavirus or COVID-19 in terms of… [10-point scale from Not al all Satisfied (1) to Extremely Satisfied (10)].
Base: 2,505

Top Factor in Travel Decisions: Advice from National Health Officials

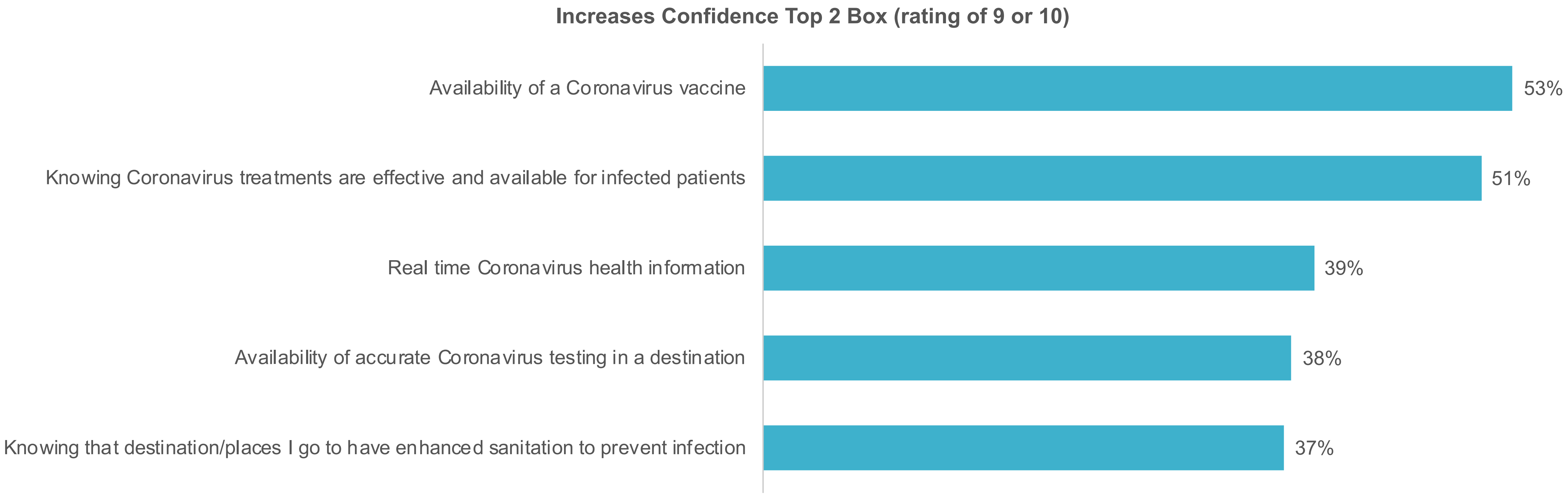
Although national and local elected officials have often taken it upon themselves to become the lead spokespersons for coronavirus updates, travelers tend to place more importance on travel advice from national (59%) and state (49%) health officials/scientists, as well as travel advice from their own doctors (50%). Other pieces of information considered of higher importance in travel decisions include the number of COVID-19 cases reported at a destination (57%), and an airlines' reputation for upholding health standards (35%).



Q9. In making a decision to cancel a trip due to the Coronavirus/COVID-19, how important would the following be in your decision making? [10-point scale from Not al all Important(1) to Extremely Important (10)].
Base: 2,505

After the “Storm” Settles, Coronavirus Vaccine, Real-Time Information will Grow Traveler Confidence

While many factors in rebuilding Traveler Confidence are outside of a destination’s/travel provider’s control (e.g., reducing the number of reported COVID cases, developing a vaccine), there are some actions that the travel industry can take to strengthen Traveler Confidence as market conditions settle. These include providing travelers with real-time coronavirus information; making accurate coronavirus testing available at the destination; and enhancing the destination’s/places sanitation practices to prevent infections.



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Q11. In terms of future travel plans, please indicate to what degree each of the following would increase your confidence in traveling to a destination. [10-point scale from Not Increase Your Confidence at All (1) to Greatly Increase Your Confidence (10)]. Base: 2,505

Appendix

Respondent Profile by Leisure Travel Segment

Respondent Profile by Leisure Travel Plans

	Total	No Travel Plans	Cancelled Travel Plans	Changed Travel Plans	Traveling as Planned
Gender					
Male	48%	47%	54%*	52%*	45%
Female	52%	53%	46%	48%	55%*
Age					
18-24	8%	7%	9%	9%	7%
25-34	24%	23%	21%	31%*	23%
35-44	19%	20%	21%	24%*	16%
45-54	16%	14%	16%	13%	18%
55-64	17%	18%*	14%	11%	18%*
65+	16%	18%*	19%*	11%	17%*
Average	45.8	46.7*	46.7*	41.7	46.9*
Household Income					
Less than $50,000	24%	28%	18%	21%	20%
$50,000 - $74,999	22%	22%	21%	21%	23%
$75,000 - $99,999	18%	18%	19%	17%	19%
$100,000 - $149,999	21%	18%	20%	25%	23%
$150,00 or more	15%	13%	21%	17%	15%

** statistical significance across leisure travel plans*

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D2. Please indicate your gender. QA. What was your age on your last birthday? D4. What is your household's combined yearly income before taxes. Include income from employment, pensions, investments or any other sources.

Respondent Profile by Leisure Travel Plans

	Total	No Travel Plans	Cancelled Travel Plans	Changed Travel Plans	Traveling as Planned
Marital Status					
Now Married	56%	55%	55%	60%	56%
Never Married	32%	33%	33%	33%	31%
Divorced, Widowed, Separated	11%	12%*	11%	7%	13%*
Ethnicity					
White	78%	77%	68%	73%	85%
Black/African American	6%	6%	12%	7%	4%
Asian/Pacific Islander	12%	12%	17%	17%	8%
Other	3%	4%	4%	3%	2%
Hispanic/Latino Decent					
Yes	9%	10%	8%	11%	7%
Employment Status					
Full time	57%	54%	56%	66%*	57%
Part time	14%	15%	12%	13%	13%
Retired	17%	18%*	18%	11%*	18%
Not employed	13%	13%	14%	11%	13%

** statistical significance across leisure travel plans*

D5. What is your marital status? (Select one) D6. What is your ethnicity? (Select one) D7. Are you from Spanish, Hispanic or Latino origin or descent? (Select one) D9. What is your employment status? (Select one).

Respondent Profile by Leisure Travel Plans

	Total	No Travel Plans	Cancelled Travel Plans	Changed Travel Plans	Traveling as Planned
Education					
Some College (<4 years)	26%	30%	23%	19%	27%
Bachelor Degree or Higher	60%	56%	61%	73%*	59%
Household Size					
1 (myself)	19%	20%	17%	16%	19%
2	34%	35%*	36%	29%	37%*
3	19%	17%	25%*	22%	19%
4	19%	20%*	9%	24%*	17%*
5 or more	9%	8%	13%	10%	9%
Children in Household (<18)					
None	62%	64%*	59%*	49%	68%*
0-5 years	16%	16%*	19%	21%*	14%
6-12 years	19%	17%	18%	28%*	15%
13-17 years	14%	13%	15%	17%*	13%
Sexual Orientation					
Straight	93%	93%	90%	92%	93%
LGBTQ+	7%	7%	10%	8%	7%

** statistical significance across leisure travel plans*

D8. What is the highest level of education you have completed? (Select one) D10. Including yourself, how many people live in your household? (Select one) D11. Are there any children in your household in any of the following age ranges? (Select all that apply) D12. Do you consider yourself…? (Select all that apply).

Respondent Profile by Leisure Travel Plans

	Total	No Travel Plans	Cancelled Travel Plans	Changed Travel Plans	Traveling as Planned
US Census Divisions					
New England	7%	6%	5%	8%	7%
Middle Atlantic	30%	30%	39%	30%	27%
East North Central	10%	7%	4%	11%	13%
West North Central	7%	7%	4%	5%	9%
South Atlantic	13%	13%	12%	12%	14%
East South Central	3%	1%	2%	4%	4%
West South Central	15%	20%	13%	12%	13%
Mountain	<1%	0%	0%	<1%	<1%
Pacific	16%	17%	21%	17%	13%

Thank You from the OmniTrak Group