

COVID-19

U.S. Travel Sentiment Survey

Wave 21: September 29, 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 September 23, 2020.

[View the full report.](#)

EXECUTIVE SUMMARY

INTENTIONS

After a period of a cautious, modest recovery in travel intentions, more of a mixed picture emerged in late September. The percentage of travelers canceling upcoming trips jumped to 44% from 34% earlier this month. Those modifying their upcoming trips rather than cancel them fell by a commensurate percentage, from 50% in early September to 41% in the latest survey. Despite these changes, there is still a strong pent-up demand for travel with 65% of travelers indicating they are planning a trip in the next six months.

IMPACT

50% of all U.S. travelers indicate that COVID-19 will have a major impact on their travel plans over the next six months. The economic impact remains relatively stable with only 22% indicating it will greatly impact upcoming travel.

IMPORTANCE OF HEALTH & SAFETY IN WHERE TO STAY

The research highlights that clear safety and cleanliness protocols matter to Americans when considering where to stay on their upcoming trips. Lodging properties with cleaning and hygiene programs are sought by 55% of travelers, and mask-wearing requirements and/or social distancing policies are desirable for 47% of those planning their U.S. trips.

PERCEPTION OF TRAVEL & SAFETY

U.S. travelers are still cautious about both their own travel plans and safety in their local community. As of late September, 43% of Americans agreed with opening up their community to visitors (up from 36% in late July) and almost half (48%) feel safe venturing out locally to dine or shop. 50% also feel it is safe to travel themselves. Rebuilding this confidence with a majority of Americans is critical to a sustained, robust recovery which will be dependent on how the pandemic is managed.

Research by:

Longwoods
INTERNATIONAL

LONGWOODS INTERNATIONAL
www.longwoods-intl.com
Amir Eylon: aeylon@longwoods-intl.com

Analysis by:

miles
PARTNERSHIP

MILES PARTNERSHIP
www.milespartnership.com
Chris Adams: Chris.Adams@MilesPartnership.com

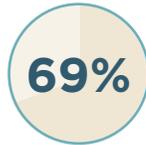
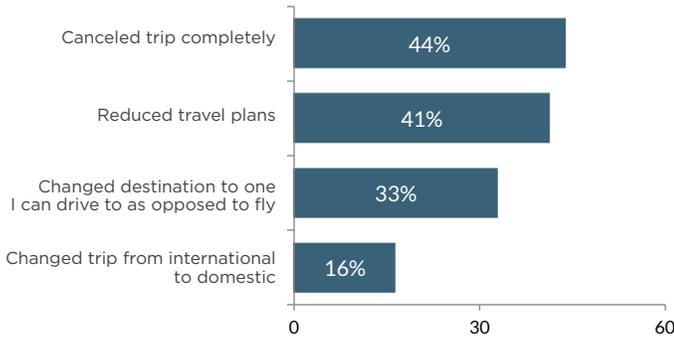
U.S. Travel Sentiment Survey

Wave 21: September 29, 2020

TRAVEL PLANS

As fall begins, a slightly more mixed outlook for travel has emerged. The percentage of travelers canceling upcoming trips rose from just over one-third (34%) two weeks ago to 44%. Those changing their upcoming trips rather than canceling them dropped by a similar percentage, from 50% earlier this month to 41% in the latest survey.

HOW DID YOU CHANGE YOUR PLANS?

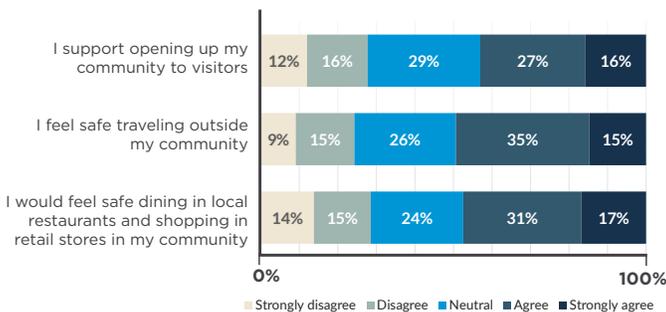


of U.S. travelers indicate they will change their travel plans in the next six months due to COVID-19 similar to levels last seen in June. But pent-up demand for travel remains strong with 65% of travelers indicating they are planning a trip in the next six months.

CONFIDENCE IN TRAVEL & TRAVELERS

As of late September, U.S. travelers' sense of safety in their own community remains an impediment to the recovery. Less than half of all Americans (43%) support opening their community to visitors or feel safe dining or shopping locally (48%). Half (50%) feel safe traveling outside their community. Confidence needs to rise well above the levels across all of these indicators if a sustained recovery in travel is to take hold.

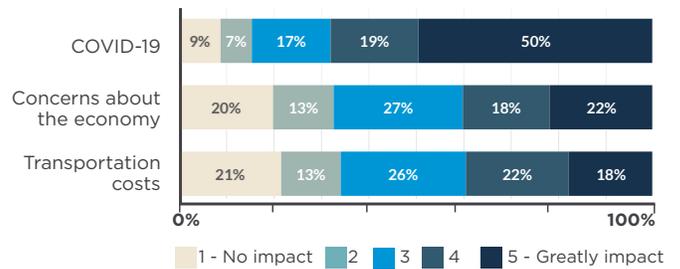
PERCEPTIONS OF SAFETY AND TRAVEL



FACTORS IMPACTING TRAVEL

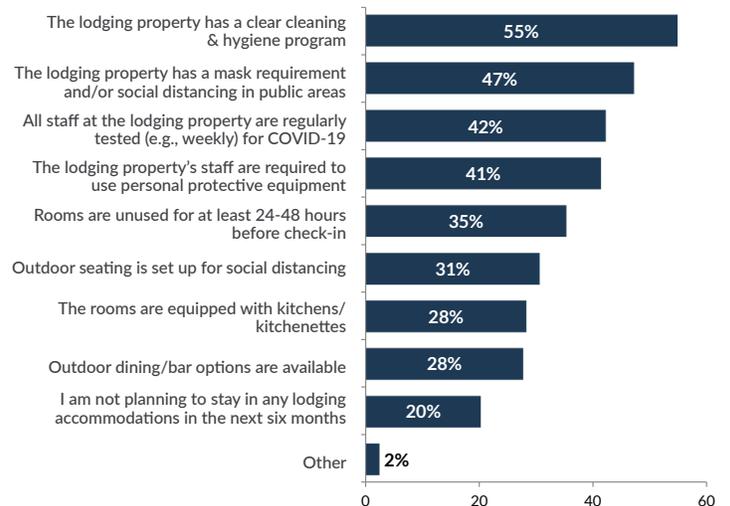
The sustained levels of concern over COVID-19 persists with 50% of U.S. travelers indicating it as "greatly impacting" their travel plans- down from the peak of over two thirds in April. The economic impact of COVID-19 remained at low levels with just over one in five indicating these concerns could impact their travel plans.

FACTORS IMPACTING DECISIONS TO TRAVEL IN THE NEXT SIX MONTHS



HEALTH & SAFETY IN ACCOMMODATIONS

A wide range of health and safety standards, protocols and facilities are important as to where Americans decide where to stay. More than 4 out of 10 U.S. travelers are seeking clear cleaning and hygiene programs, mandatory mask wearing in public spaces and for hotel staff to use PPE where appropriate plus being regularly tested for COVID-19. The responses highlighted the importance of clear, consistent health and safety standards. They are critical to encouraging travel and are a key factor in the decision on where they stay.



Research by:



LONGWOODS INTERNATIONAL
 www.longwoods-intl.com
 Amir Eylon: aeylon@longwoods-intl.com

Analysis by:



MILES PARTNERSHIP
 www.milespartnership.com
 Chris Adams: Chris.Adams@MilesPartnership.com