

COVID-19 U.S. Travel Sentiment Survey

Wave 26: December 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 December 2, 2020.

[View the full report.](#)

EXECUTIVE SUMMARY

INTENTIONS

COVID-19 case numbers and health impacts continue to accelerate across the U.S. as of early December. 15% of U.S. travelers have canceled their holiday travel plans in the last two weeks alone as the pandemic surges nationwide. Another 10% shifted their holiday trips from a fly trip to a driving one. Meanwhile, almost half say they did not plan to travel during the holidays and that has not changed since mid-November.

IMPACT

The dramatic increase in coronavirus cases, hospitalizations and deaths is reducing consumer confidence in all types of travel, including holiday travel. We expect further contraction of the travel segment as health conditions continue to deteriorate across the country.

FACTORS IMPACTING TRAVEL

The pandemic continues to be central to a challenging outlook for travel over the coming winter months. Despite recent positive news on vaccines, the short term outlook remains bleak with nearly 7 out of 10 U.S. travelers citing COVID-19 as a significant impediment to their travel plans and over 4 out of 10 indicating that they are opting out of all travel until there is a vaccine.

PERCEPTION OF TRAVEL & SAFETY

Continuing this theme of a highly constrained outlook for travel over the next 3-4 months, only 43% of U.S. travelers feel it is safe to dine or shop in their local community, down from 47% one month ago. Only 42% feel safe venturing outside of their local communities, a small rise in the last two weeks. Another indicator of constraints on travel's recovery: the percentage of travelers who support opening their own local communities to visitors stayed at a record low of 32%. Perhaps more than any other indicator this needs a sharp improvement before the tourism industry can look ahead to a sustained and robust recovery. Local support for the return of travel is critical to ensure a warm welcome for visitors and for tourism to avoid any PR or political damage during the recovery.

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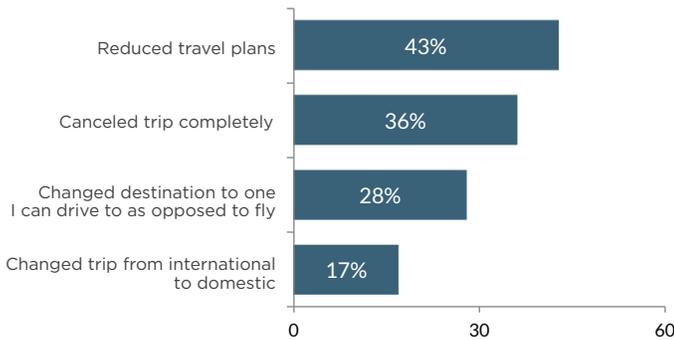
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TRAVEL PLANS

Record levels of COVID-19 cases remain a huge impediment to travel over the winter with 43% of U.S. travelers reducing travel plans and more than one-third canceling their trip completely. Some degree of travel substitutions are continuing, but no significant improvement is expected in these numbers until there is more certainty over vaccination distribution in the new year.

HOW DID YOU CHANGE YOUR PLANS?

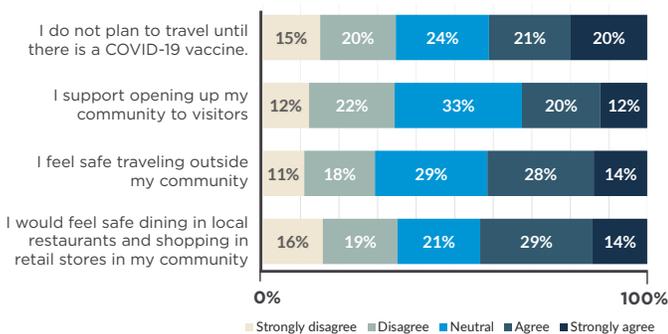


of U.S. travelers indicate they will change their travel plans in the next six months due to COVID-19, still a high level but below levels seen at the start of the pandemic. 62% of travelers still have travel plans in the next six months which is a modest rebound from a record low of 58% last month.

CONFIDENCE IN TRAVEL & TRAVELERS

U.S. travelers' confidence remains highly constrained. Only 32% of travelers support opening their community to visitors while just 43% feel safe dining or shopping locally. 42% U.S. travelers feel safe traveling outside their community, down from 46% one month ago. Finally, more than 4 out of 10 (41%) American travelers are not planning any travel until there is a COVID-19 vaccine available, up from 34% reported in early November.

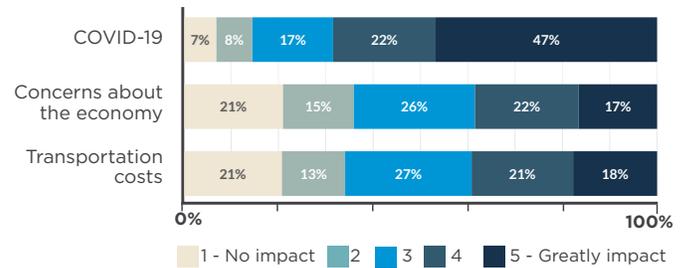
PERCEPTIONS OF SAFETY AND TRAVEL



FACTORS IMPACTING TRAVEL

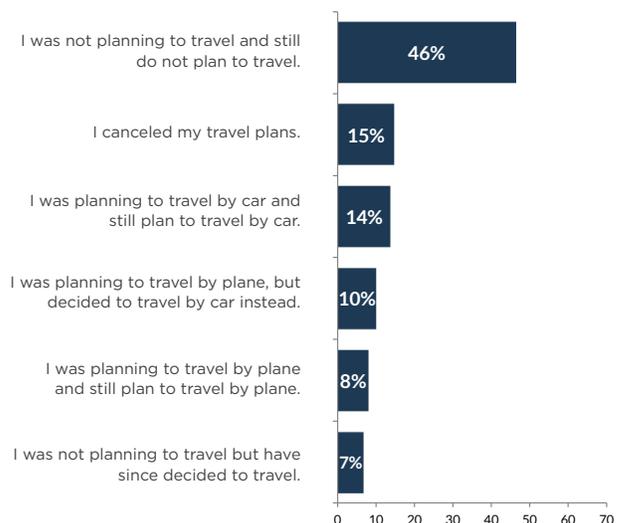
COVID-19's impact remains consistently the dominant factor impacting the outlook for travel with just under half of U.S. travelers (47%) indicating that COVID-19 will "greatly impact" their travel plans in the next six months. 69% indicate some level of impact from the pandemic compared to 39% for both economic concerns and transport costs.

FACTORS IMPACTING DECISIONS TO TRAVEL IN THE NEXT SIX MONTHS



IMPACT ON HOLIDAY TRAVEL

The recent surge in COVID-19 cases and hospitalizations to record levels and the increasing official calls to limit travel and holiday gatherings have had a distinct impact on holiday travel. 15% of U.S. travelers canceled their holiday travel plans in the last 2 weeks alone and nearly half (46%) were already not planning any travel. 1 in 10 substituted car travel for a planned trip by plane.



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