



PETERMAYER

# COVID19 Impact on Travel Attitudes & Intentions Wave 3

June 10, 2020

# Research Objectives

Understand and communicate insight into the Coronavirus crisis' impact on travelers' psyches, not just their behavior

- Which traveler types will return sooner?
- What are underlying concerns and which ones are addressable by a brand's advertising and actions?
- How are attitudes shifting as we are coming out of this period? Which ones are not shifting?



# Methodology

- A quantitative study to enable us to project results to the population
- Respondents sourced via an online list/panel fit the following requirements:
  - Stayed in paid accommodation for leisure travel at least once in 2019
  - Have \$50K or more in household income
- Four waves:
  1. Fielded April 18 through 21, 2020, yielding 581 completed responses
  2. May 2 to 5, 2020; 558 completed responses
  3. May 17 to 19, 2020; 841 total respondents, 375 from Southeast states
  4. An additional wave is planned during the summer, exact timing TBD
- Ongoing waves give us the opportunity to understand evolution of traveler sentiment, intent and behavior



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# Executive Summary

Wave 3 Findings



# Key Findings – Overall

- **Travelers are feeling less stressed and less constrained** by their concerns
- That is **not yet translating into greater expectations regarding the number of trips** they will take in 2020; travelers continue to lose hope for their 2020 summer vacations
- They **remain highly likely to be limited by safety concerns, particularly on flights, cruises and at theme parks**
- **Road trips, briefer trips and outdoor-focused trips (including beaches) are more tempting**
- While key travel dreaming behaviors have declined since mid-April, many travelers are still **trying to scratch their travel itch by engaging with travel content**
- They are **still craving relaxation, escape and connection** more so than adventure and novelty



# Key Findings – Southeastern States

- **In Southeastern states, travelers report lower levels of stress and concern** than the national audience does, on average
- While they express less angst overall, they are just as disinclined to fly or cruise, so **it's still all about the road trip**
- As of mid-May, Southeasterners were similar to the national audience in the number of trips they expect to take in 2020, though **more likely to believe they would vacation this summer**
- Southeastern travelers are **somewhat less concerned than the national audience about restaurants, hotels, museums and short road trips**



# Key Findings – Ready to Go! Travelers

- **Nearly half of travelers said they will be ready to vacation as soon as non-essential travel is widely approved, if not before**
  - Those “Ready to Go!” travelers are **much more confident that they will vacation this summer**
  - They are much more inclined to pursue travel opportunities, and expect to travel significantly more this year than the Travel Averse respondents do
  - “Ready to Go!” travelers **still have concerns, but most have decreased significantly over time**
- More so than their more reluctant counterparts, **travelers who are Ready to Go! are actively engaging with travel content – online and off**
- **Ready to Go! travelers do not fit a specific demographic profile**, but may differ from the more reluctant travelers in one of the following ways
  - Less likely to be feeling anxious or stressed
  - Less likely to have someone in their household who is particularly vulnerable to COVID19
  - Less likely to have been directly impacted by Coronavirus (via sickness or financial impact)
  - More likely to consider travel, under normal circumstances, an important part of their lives
  - A little more likely to prefer Fox over CNN



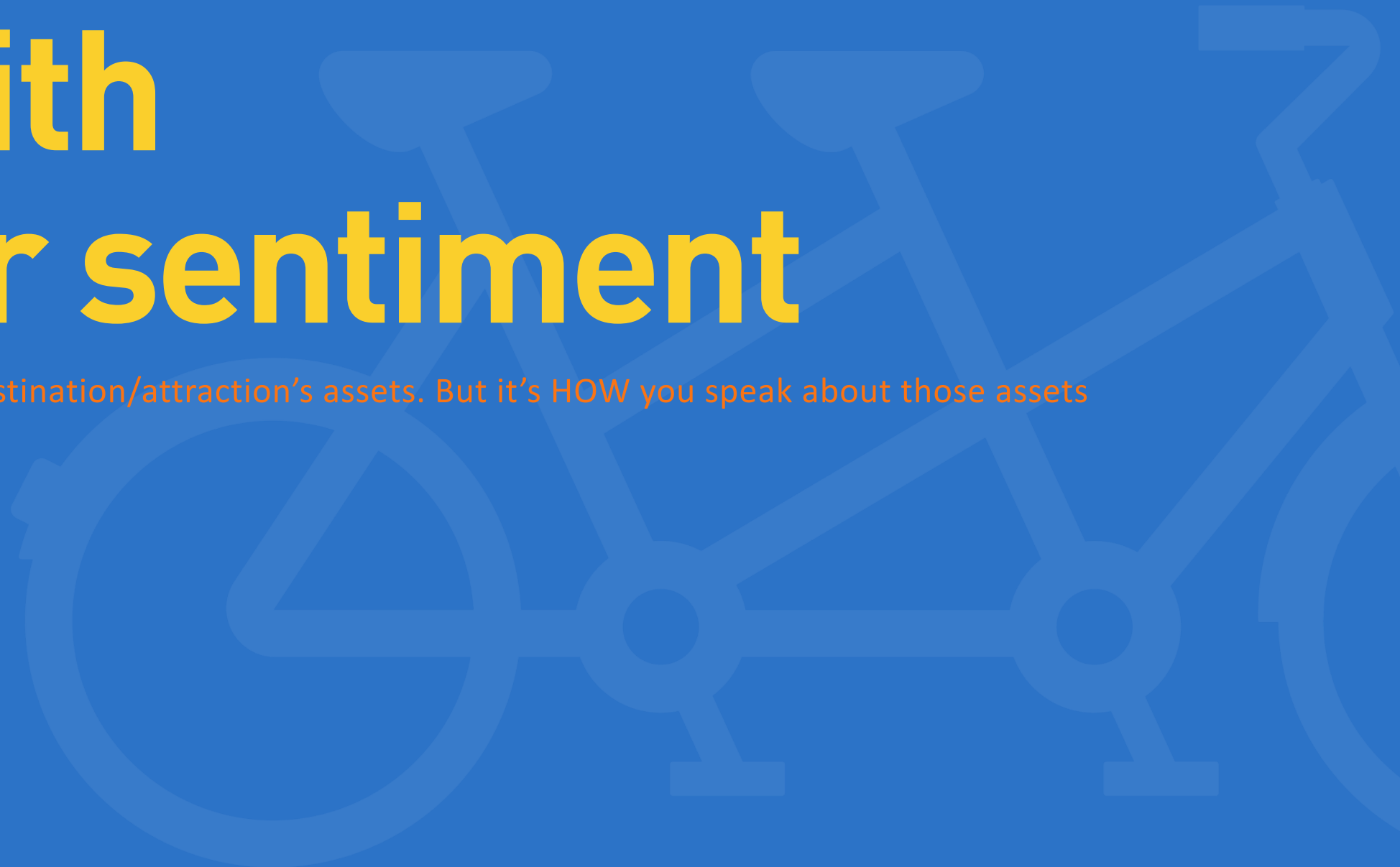
# Implications & Discussion Points

- Given the gravity of concerns, we should not be thinking about convincing people to travel; **the battle to fight is convincing Ready to Go! travelers to choose our destinations/attractions** as they are considering alternatives
- Beach destinations should of course **make the most of summer**, as they are uniquely able to take advantage of pent-up demand from Ready to Go! travelers
- Other destinations/attractions face a longer road to recovery; especially theme parks and sports stadiums
- As flights remain daunting for most, **drive market travelers should remain our focus**
- **Messaging should reflect current motivations** – relaxation, escape, connection as well as change of scenery
- As returning to favorite places is also a key motivator now, teams should be **maximizing opportunities with email lists, fan bases and other sources of repeat visitors**
- **Many travelers who are Ready to Go! are actively engaging with travel planning content, and we should maximize opportunities to get content in front of them** as they do so
- **Travel-intender and lookalike strategies** (such as paid search, TripAdvisor, Expedia, other OTAs, Quantcast, Sojern, Adara and the like) **may be the best bets in many cases**
- That said, many who are reluctant to travel right now are still engaging in dreaming and planning behaviors, so – if budgets support investment in brand-building and longer-term impact – broader marketing efforts may be wise
- **As we move toward Fall, we should focus efforts on travelers unlikely to be constrained by school schedules – those travelers will be more important than ever this year**

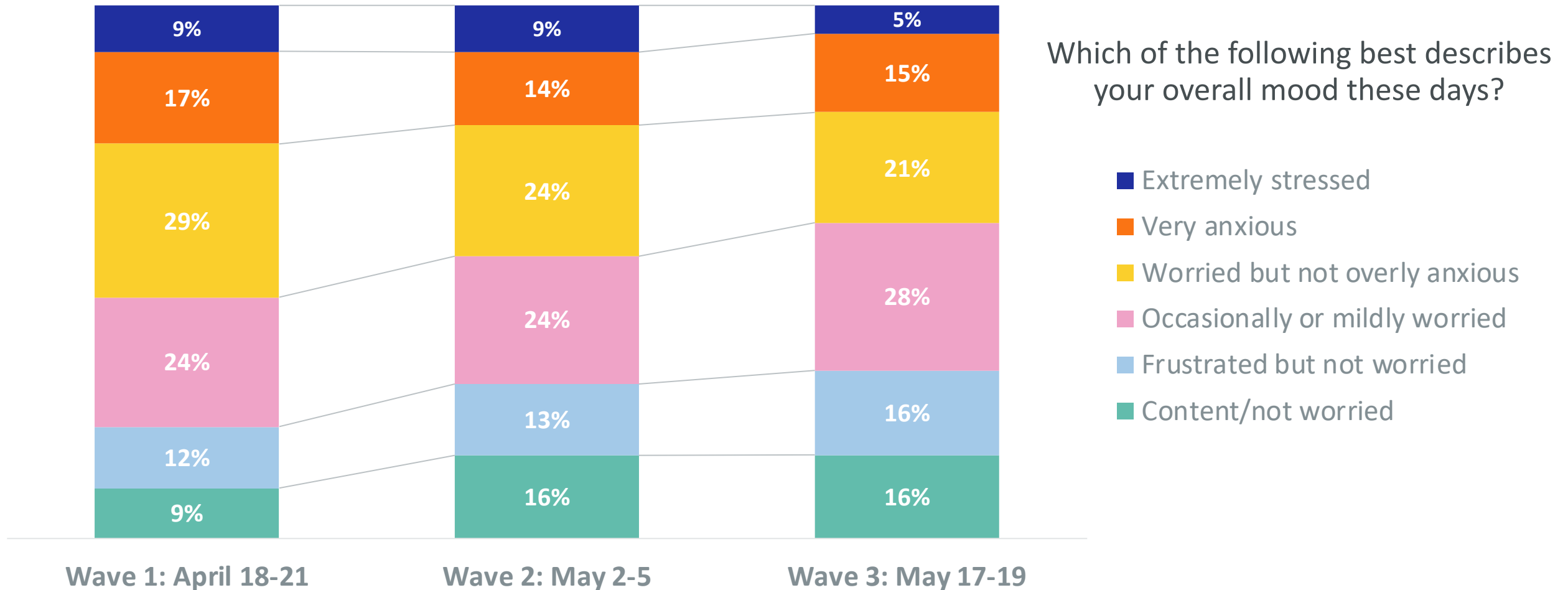


# Start with traveler sentiment

It's easy to jump to marketing a destination/attraction's assets. But it's HOW you speak about those assets that will make all the difference.

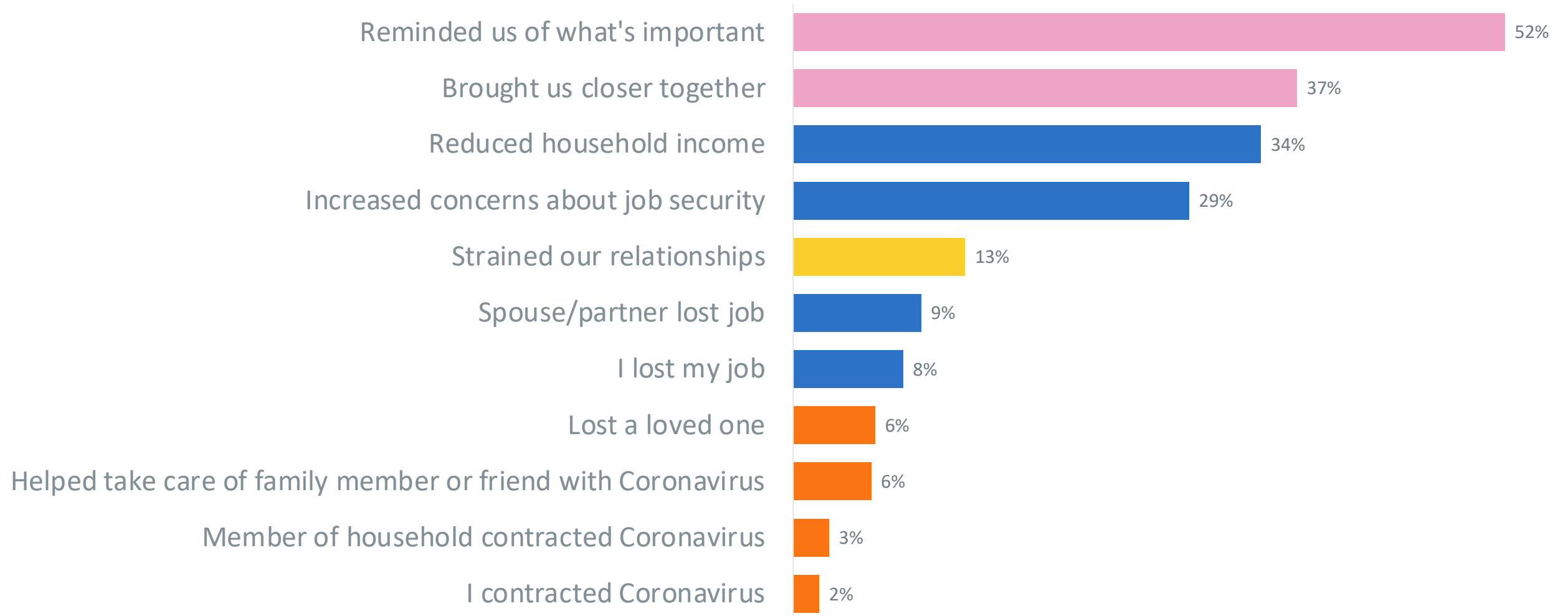


# As the weeks go on, overall stress levels are coming down for many travelers.



# For most, there's a silver lining – the crisis has reminded us of what's important and brought many of us closer together.

*“How has Coronavirus impacted your household? (Select all that apply.)”*





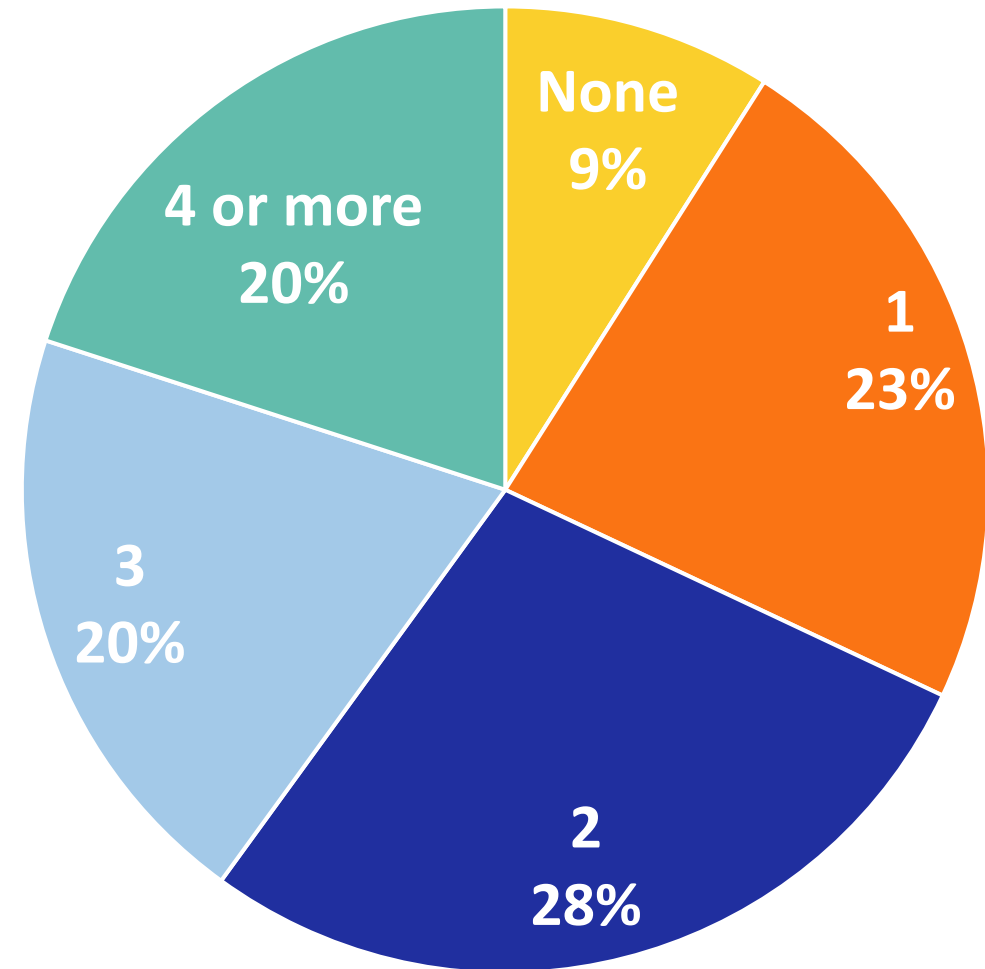
# Will travel rebound soon?



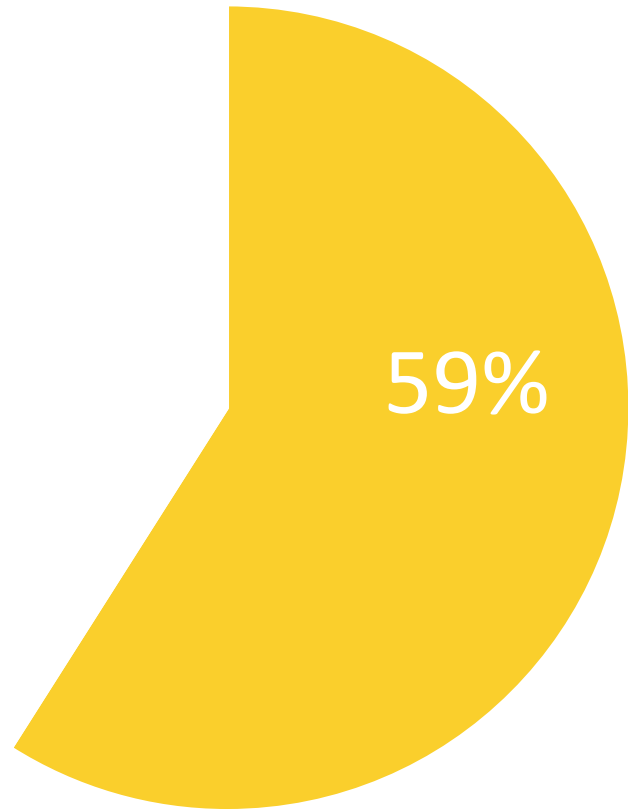
While some destinations and attractions are benefiting from pent-up demand, most face a long road to recovery.

# Before Coronavirus became a major concern, 91% of travelers had one or more vacations planned for 2020.

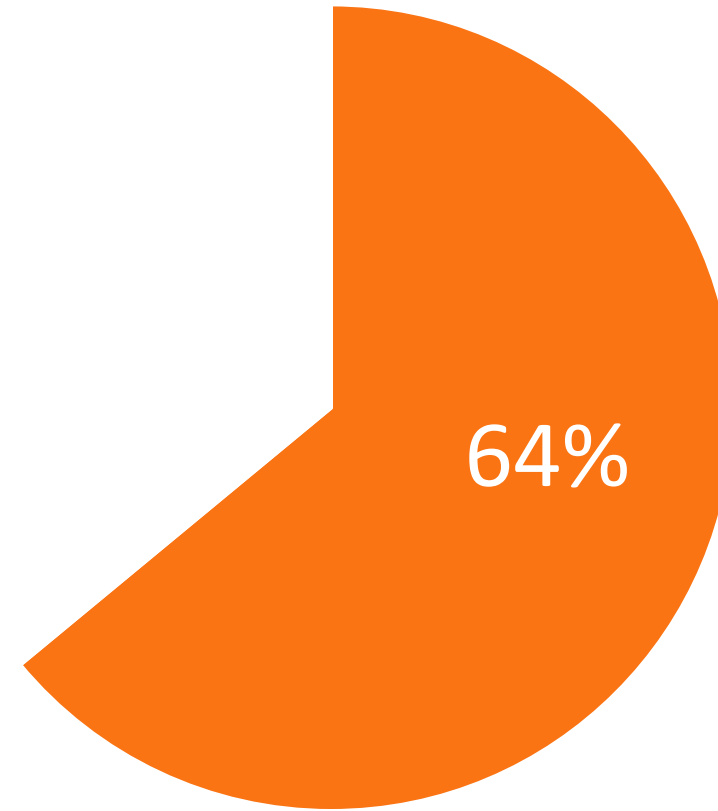
Before Coronavirus was a serious concern, how many vacations did you have planned for 2020?



# Nearly two thirds of travelers have cancelled trips since the Coronavirus crisis began.



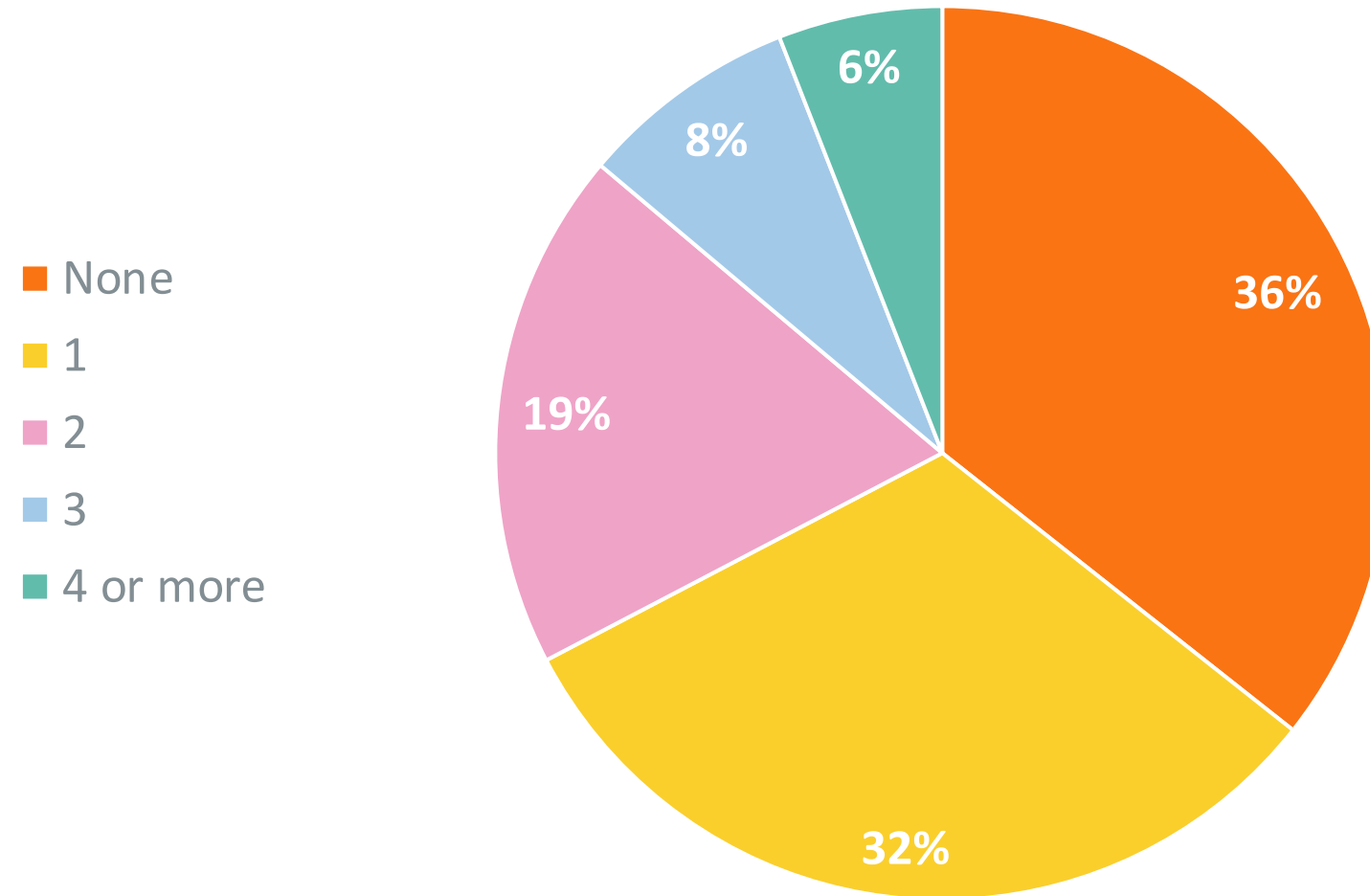
Have postponed at least 1 trip



Have cancelled at least 1 trip



# As of mid-May, over a third of travelers did not expect to vacation in 2020.



*“At this point, how many vacations or leisure trips do you expect you will take in 2020?”*



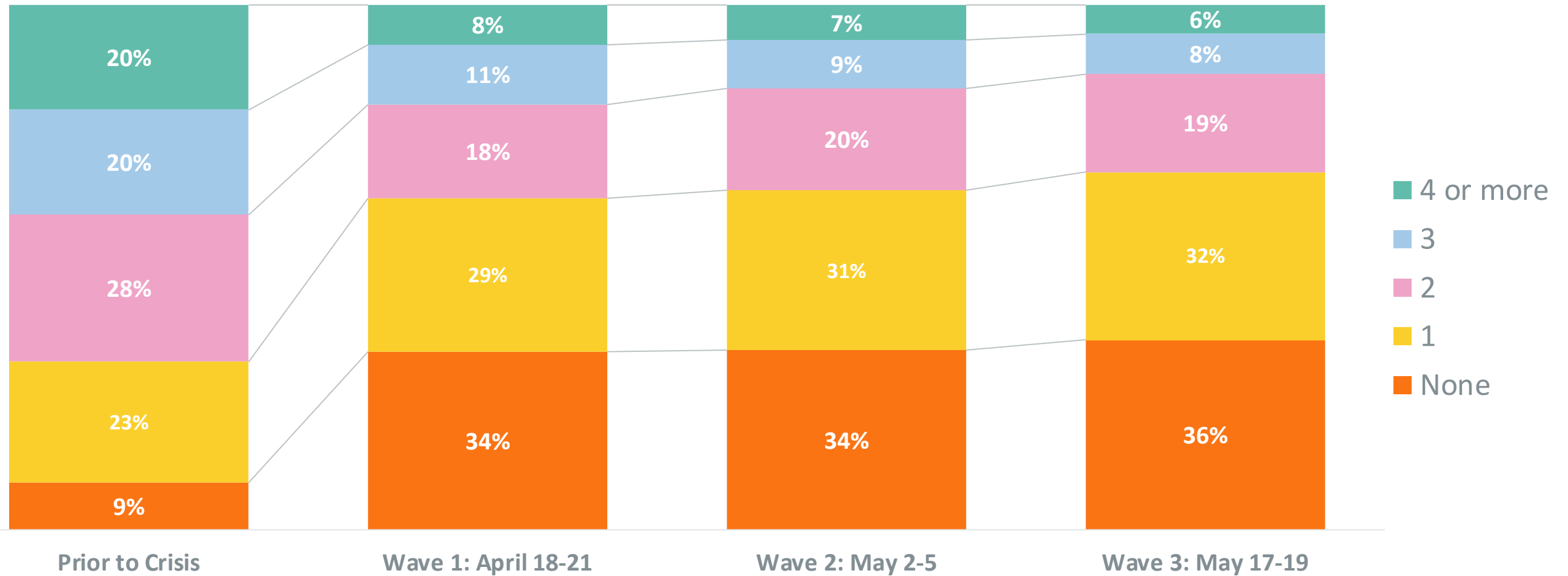
# The decreasing stress levels are not translating into greater expectations regarding the number of trips they'll take in 2020.

**2.19** trips in 2020  
average expected per traveler

**1.29** trips in 2020  
average expected per traveler

**1.24** trips in 2020  
average expected per traveler

**1.14** trips in 2020  
average expected per traveler

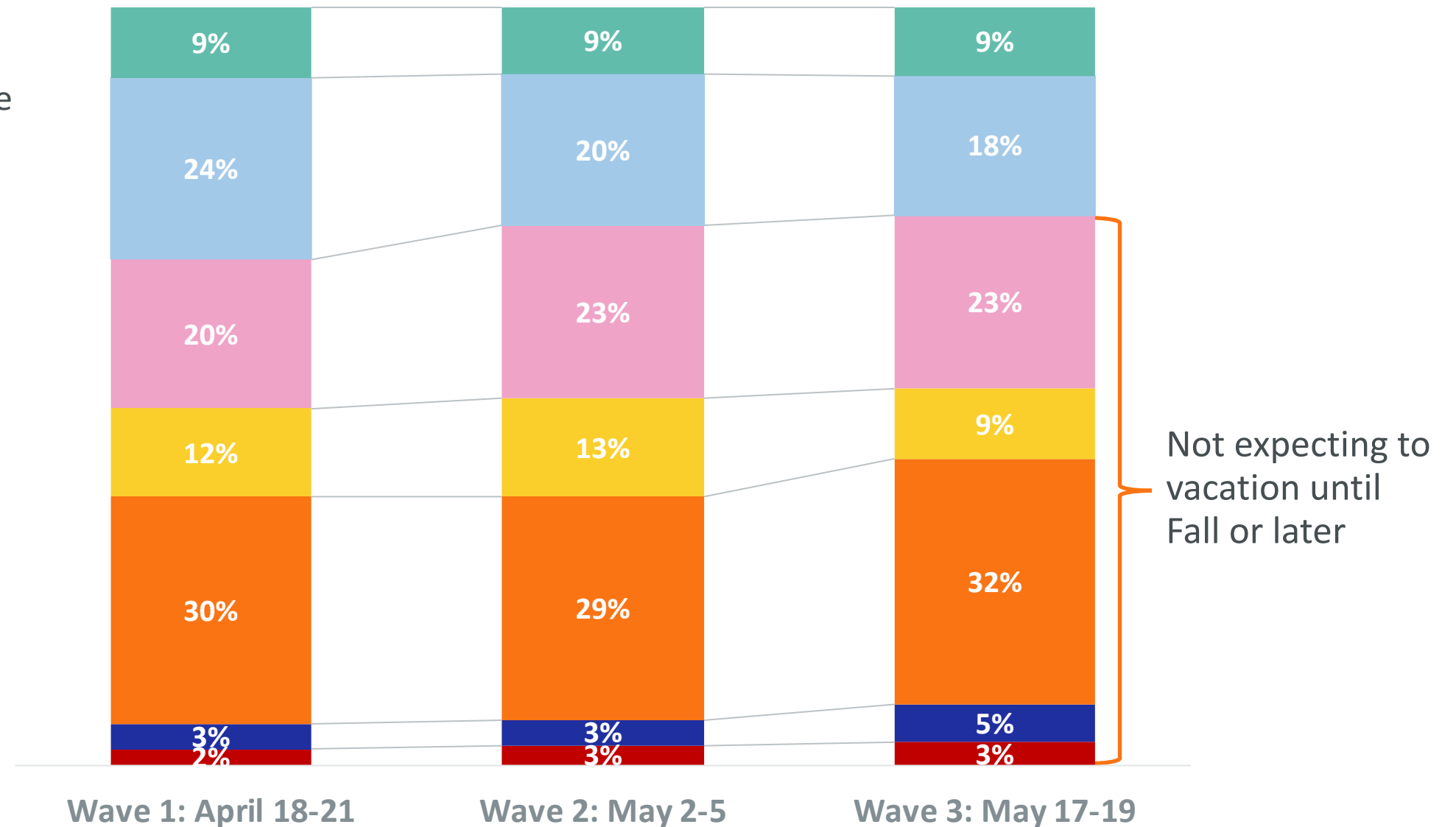


Prior to crisis, asked during Wave 1: "Before Coronavirus was a serious concern, how many vacations did you have planned for 2020?"  
Waves 1 through 3: "At this point, how many vacations or leisure trips do you expect you will take in 2020?"

# Travelers continue to lose hope for their 2020 summer vacations.

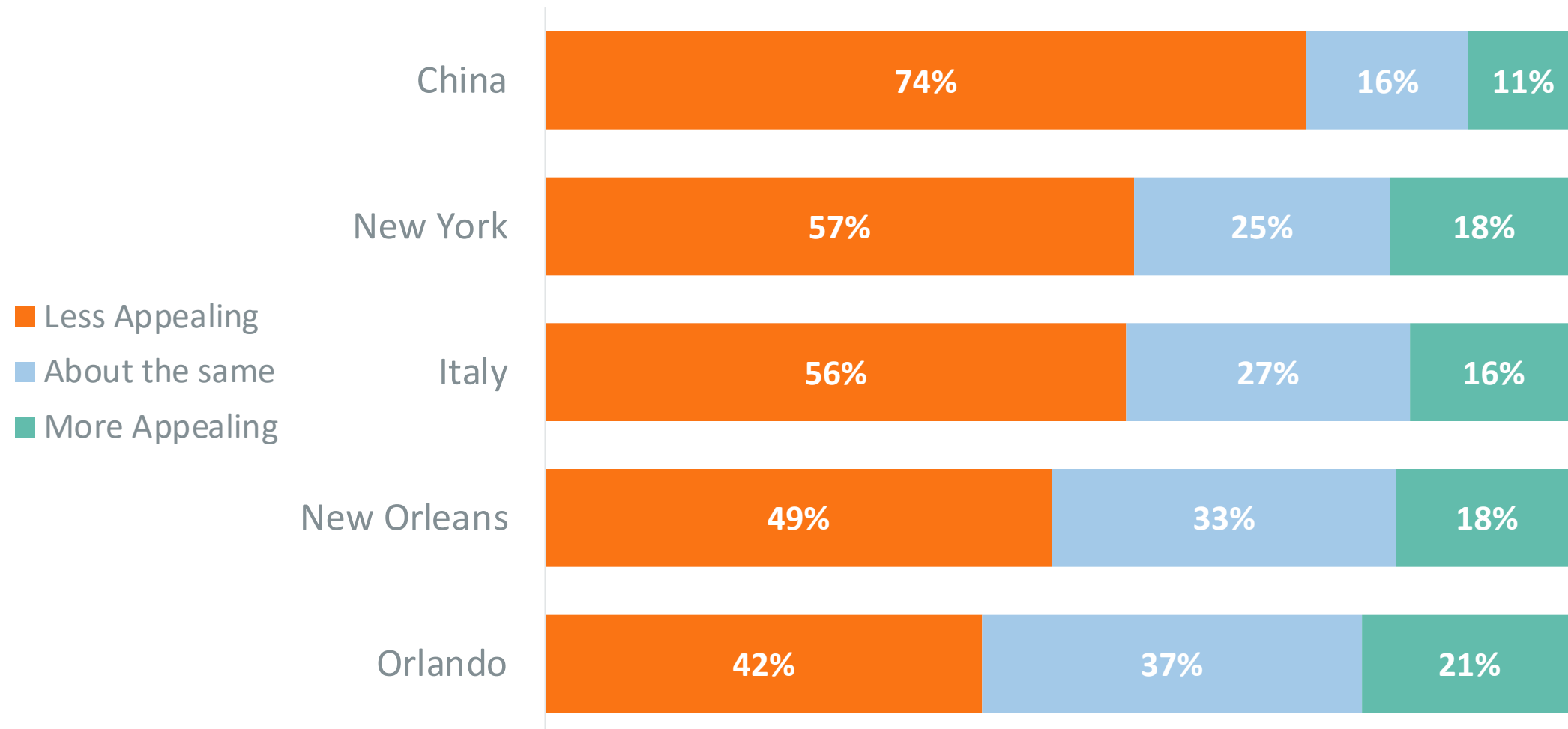
How long do you think it will be before you vacation again?

- Before Summer 2020
- Not until Summer 2020
- Not until Fall 2020
- Not until the Holidays 2020
- Not until 2021
- Not until 2022
- Maybe never

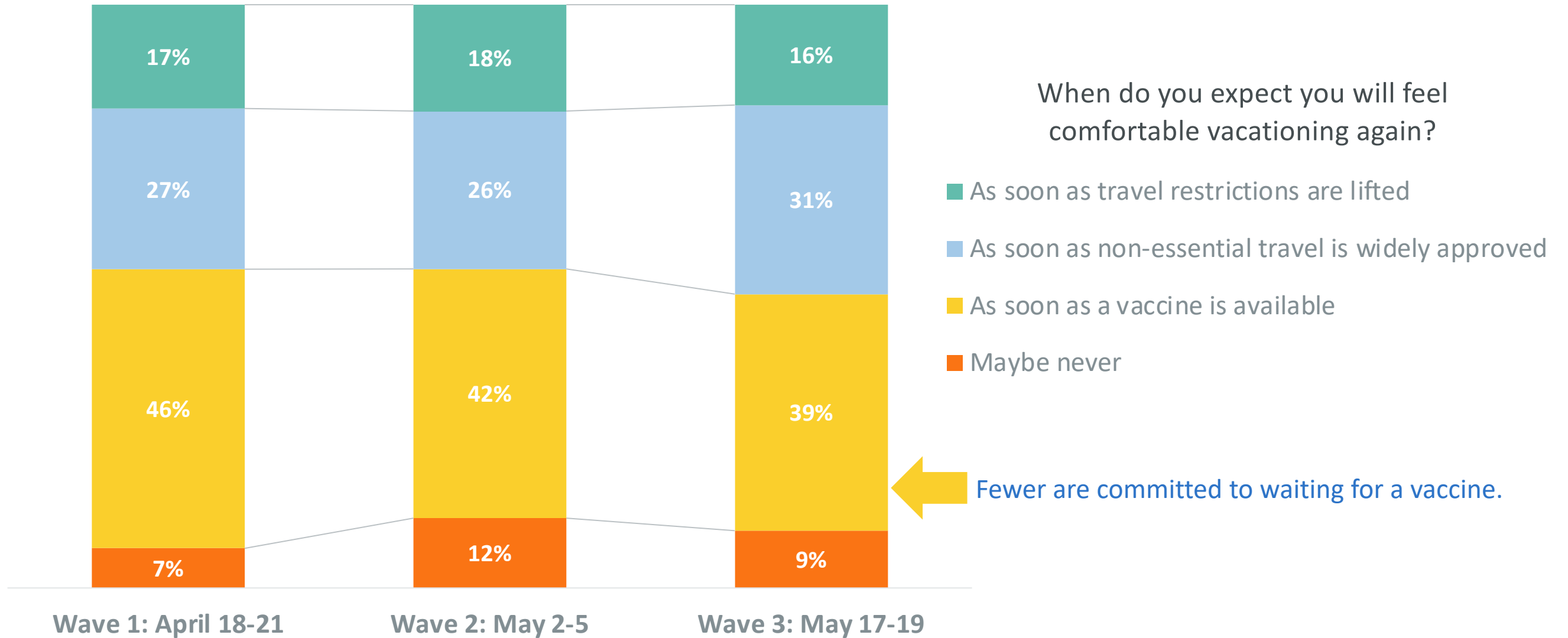


# Coronavirus hotspots have lost appeal among travelers, and other destinations – like Orlando – are not immune to the impact.

*“Compared to how you felt in 2019, how appealing are the following destinations?”*



# Compared to earlier waves, however, more travelers said they would be comfortable traveling again as soon as it is widely approved.

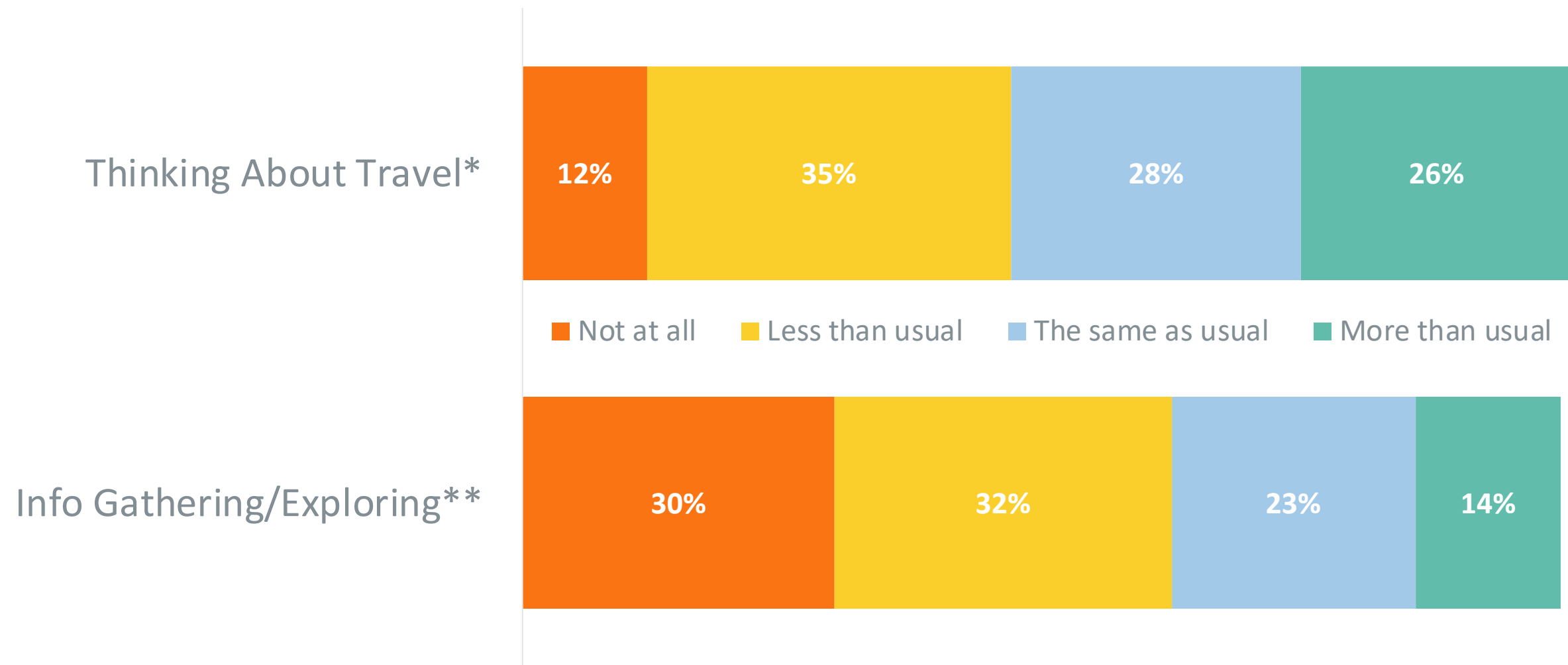




# Travel dreaming – not travel doing

Help travelers visually enjoy destinations from afar –and use travel-intender marketing and retargeting smartly to capture those who are engaging in early travel planning online.

# While over half of travelers surveyed were thinking about travel at least as much as usual, nearly two thirds were doing less information gathering.

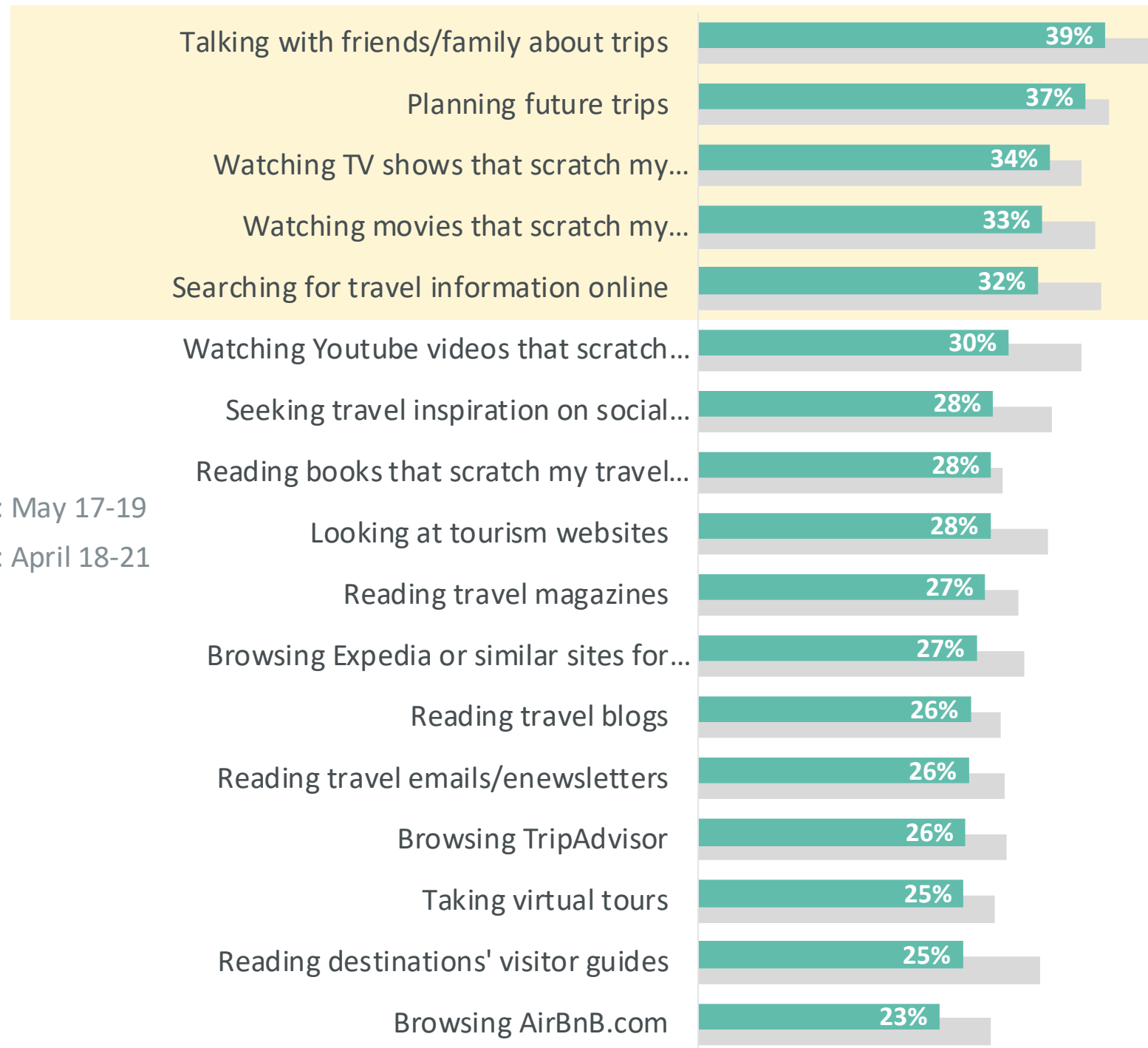


\* Since Coronavirus became a serious concern, how much have you been thinking about future vacations?

\*\* Since Coronavirus became a serious concern, how much time have you spent looking at travel information or gathering information about possible future vacations?  
Wave 3, responses gathered May 17 through May 19, 2020. Minimal change in results since Wave 1.

# Key travel dreaming behaviors have declined since mid-April, but many travelers are still trying to scratch their travel itch.

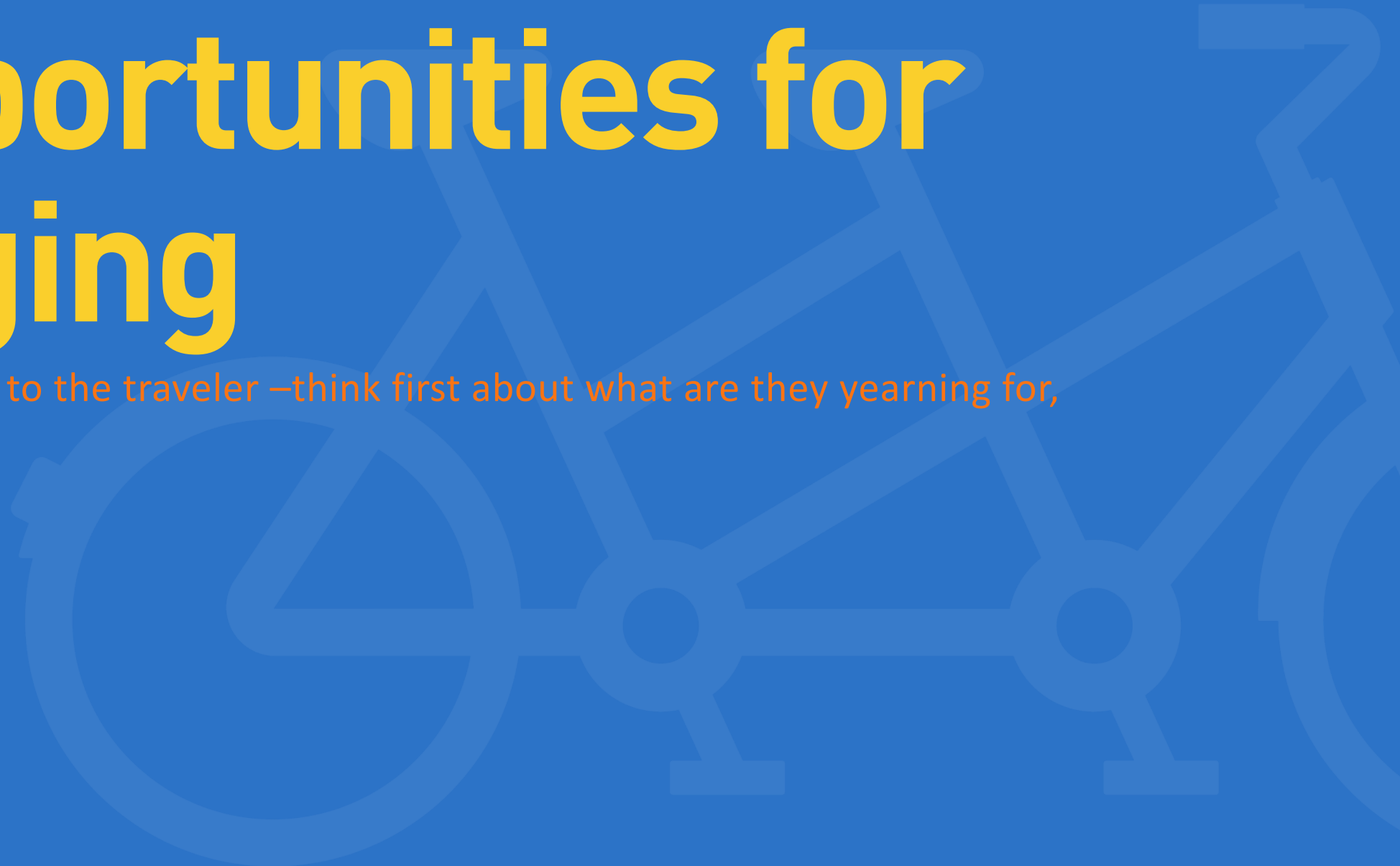
■ Wave 3: May 17-19  
 ■ Wave 1: April 18-21



Q: "What, if anything, are you doing to fulfill your travel bug while travel opportunities are limited?" A: All the time, very frequently or often.

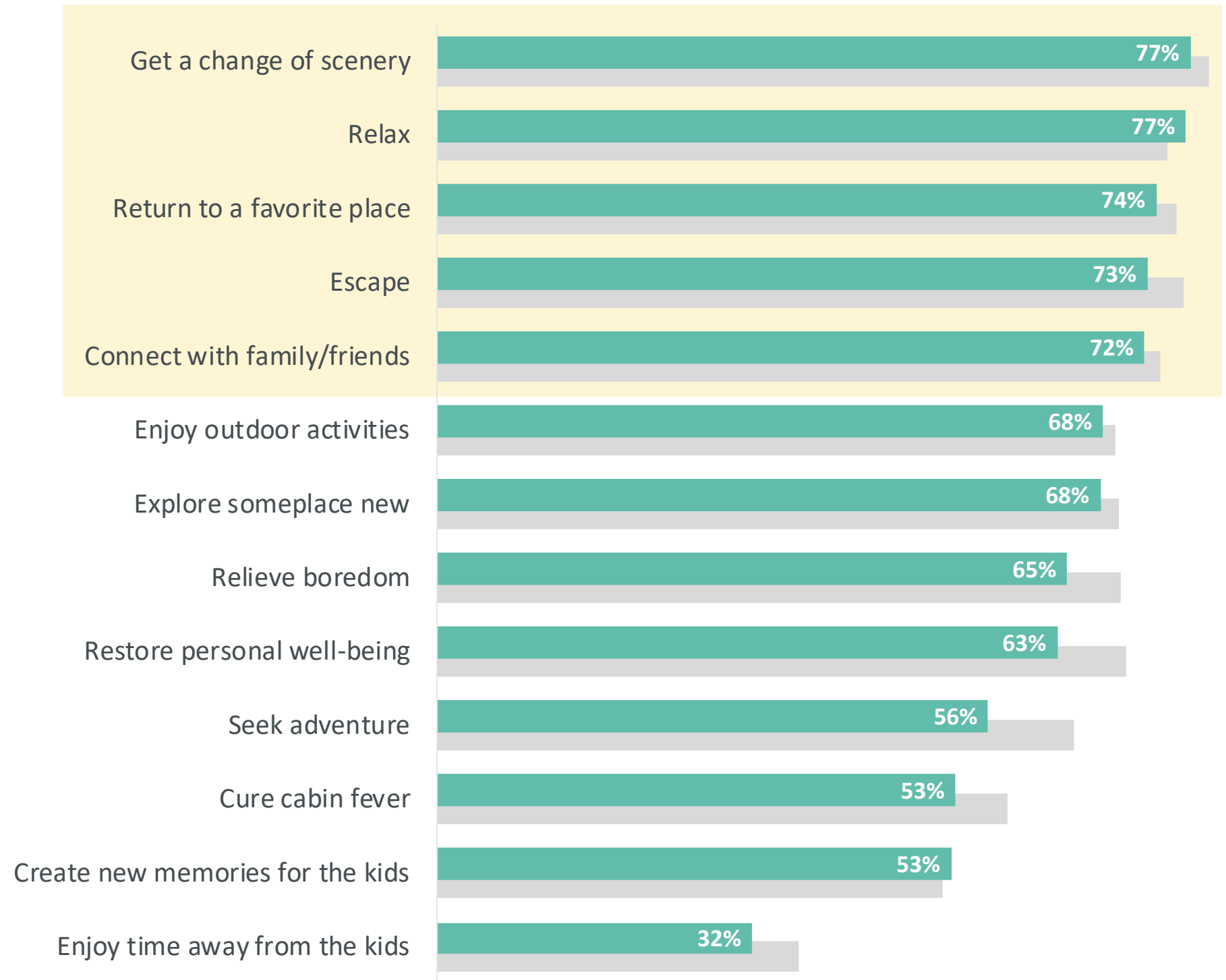
# Top opportunities for messaging

It's always going to come back to the traveler –think first about what are they yearning for, versus what you have.



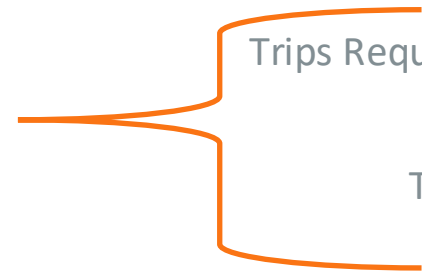
# Travelers are still craving soothing more so than adventure and novelty.

■ Wave 3  
■ Wave 1

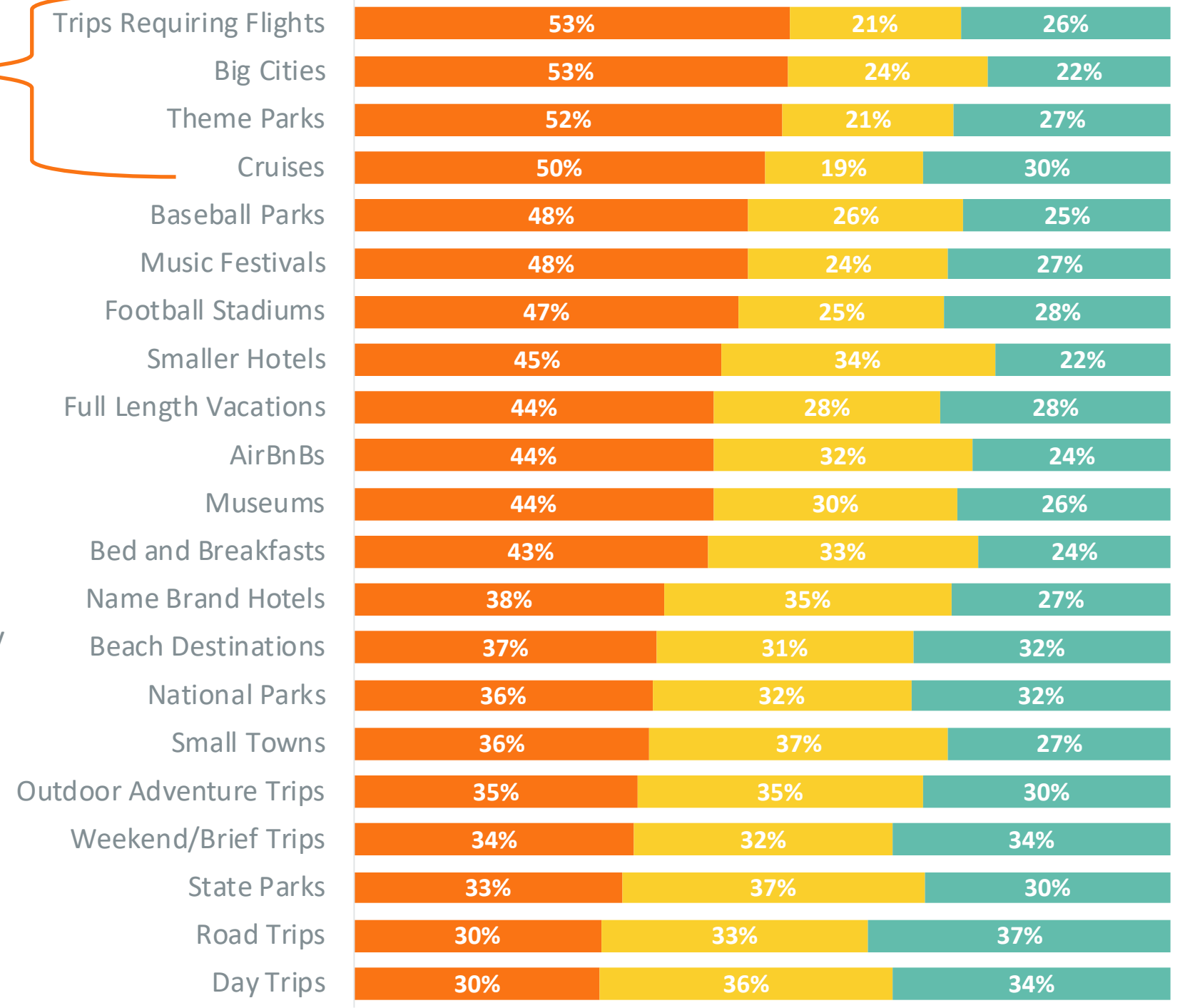


Q: "On a scale of 1 to 5, 5 being a very strong motivator, what are the reasons you will be eager to travel once restrictions lift?" A: 4 or 5.

# Flights, big cities, theme parks and cruises remain most likely to be impacted even after restrictions are lifted.



■ Less Likely  
■ No change  
■ More Likely

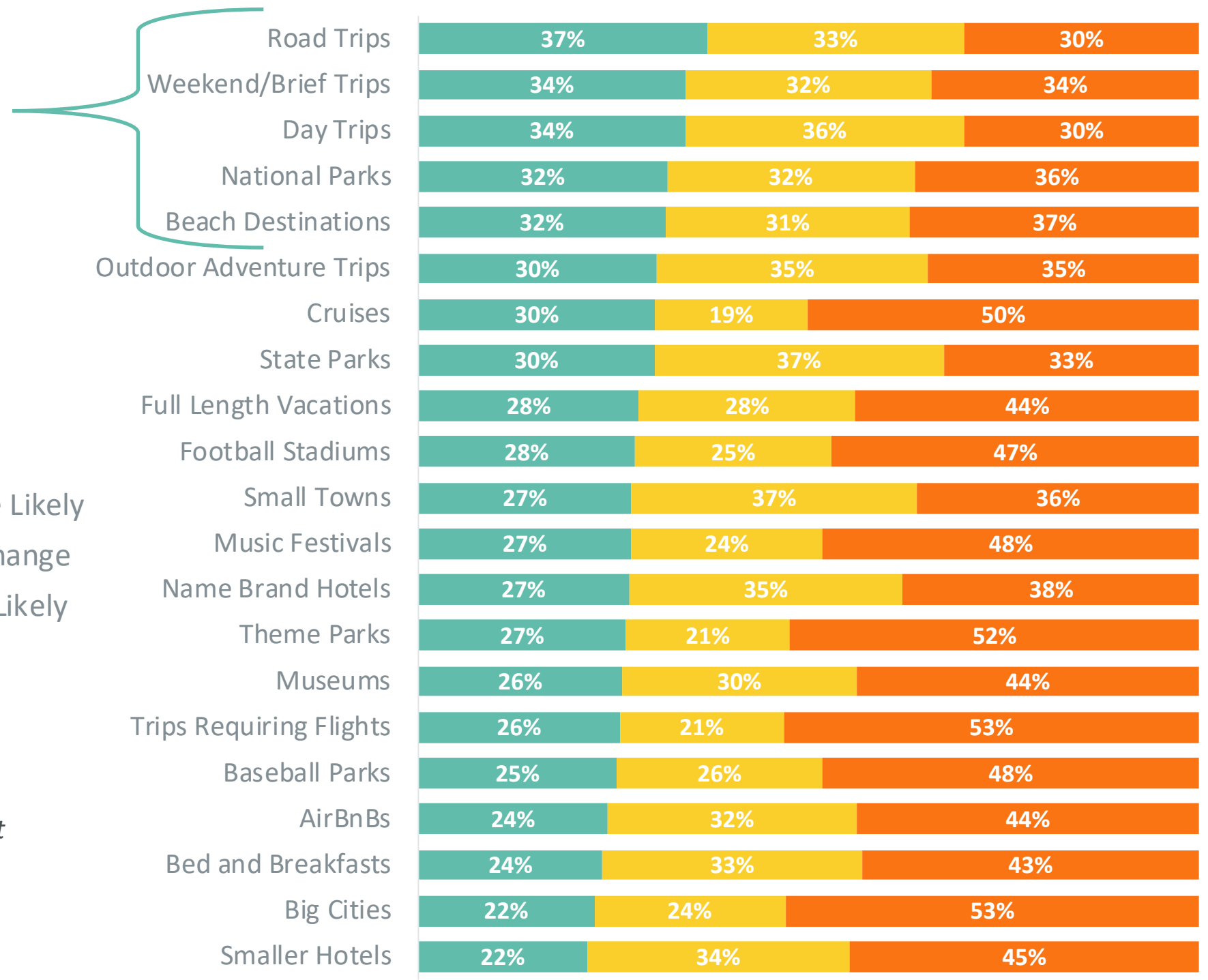


*“How do concerns about Coronavirus impact your likelihood to visit/take the following (once they are open/possible)?”*



# By comparison, road trips, briefer trips and outdoor-focused trips (including beaches) are likely to be more tempting.

■ More Likely  
■ No change  
■ Less Likely

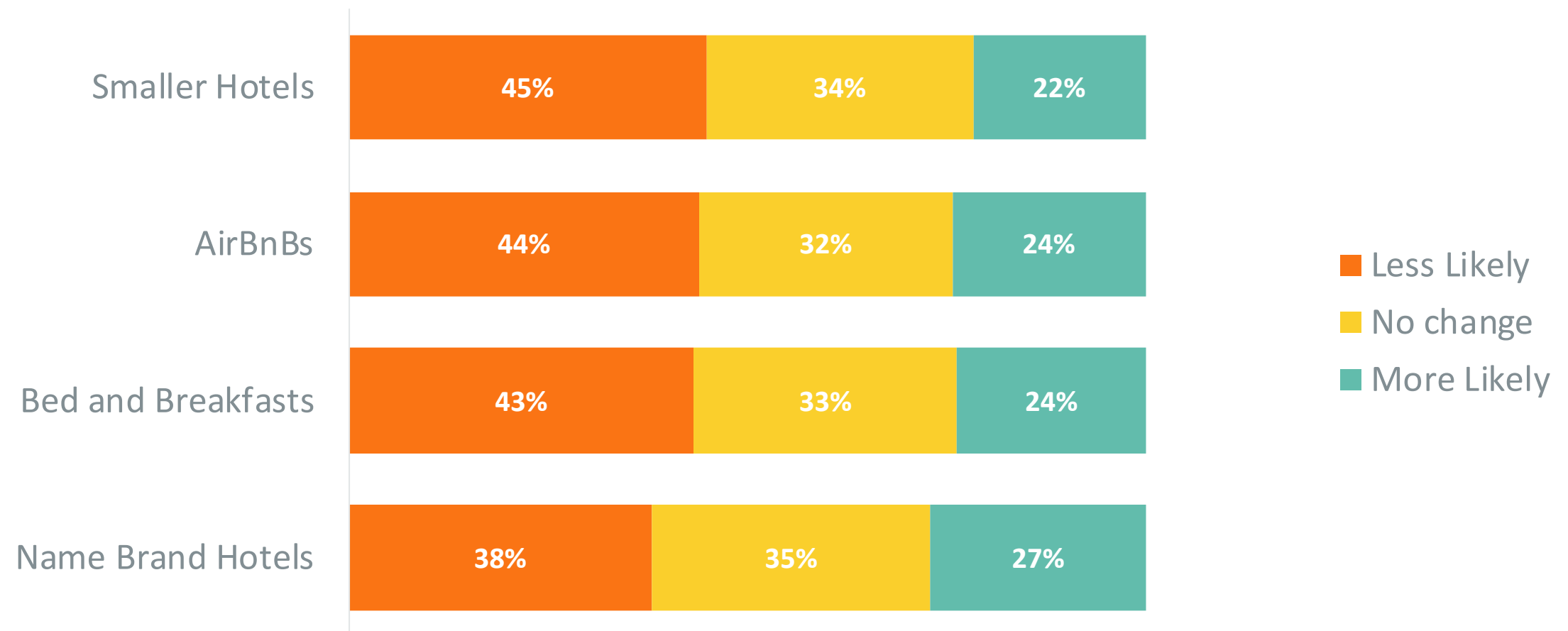


“How do concerns about Coronavirus impact your likelihood to visit/take the following (once they are open/possible)?”



# Smaller, independent properties may fare worse than name brand hotels as travelers move toward vacationing again.

*“How do concerns about Coronavirus impact your likelihood to visit...?”*

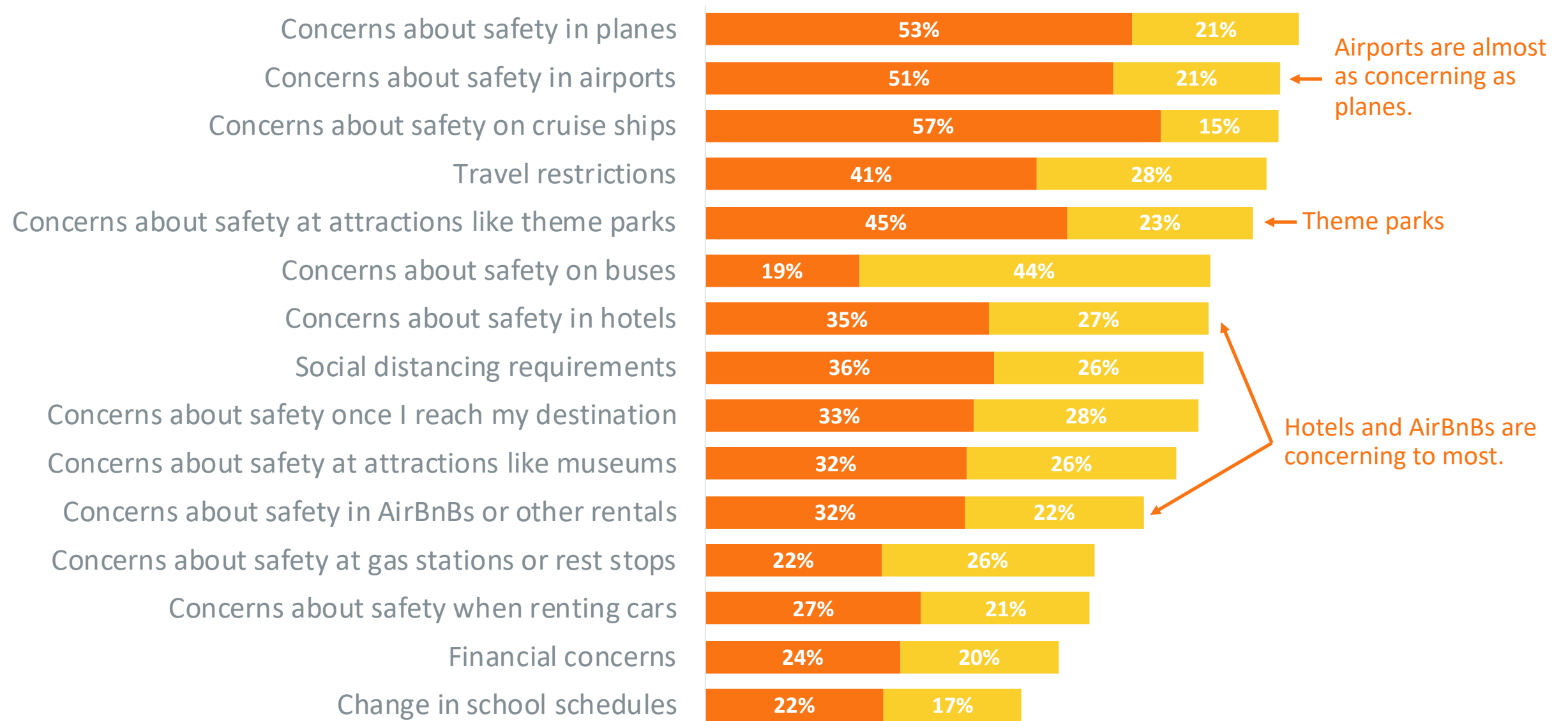




# Traveler concerns imply need for safety messaging AND measures

Crowd mitigation/social distancing accommodations, as well as cleaning, are important underscores.

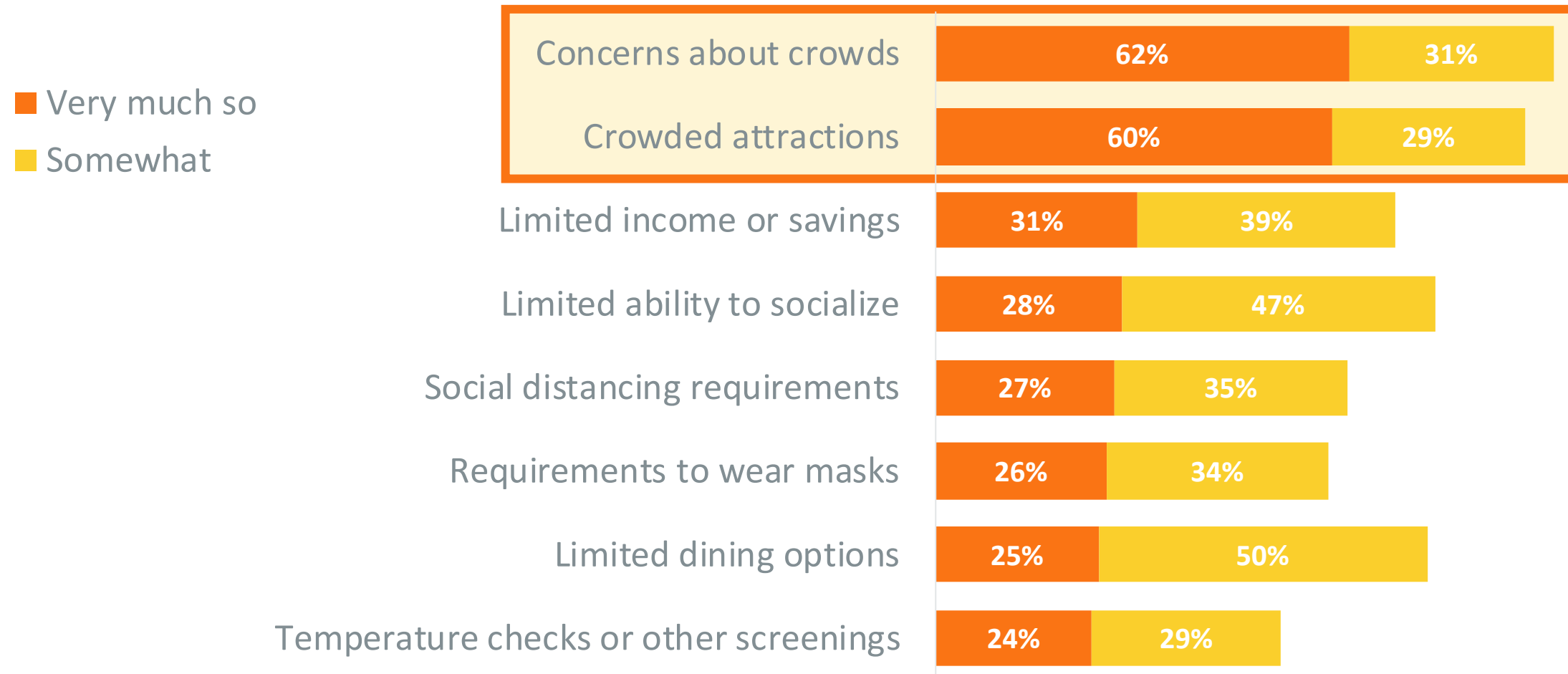
# Travelers remain highly likely to be limited by safety concerns, particularly on flights, cruises and at theme parks.



*“On a scale of 1 to 5, with 5 being most likely, to what degree are the following likely to limit your travel this year?”*

*Wave 3, responses gathered May 17 through May 19, 2020.*

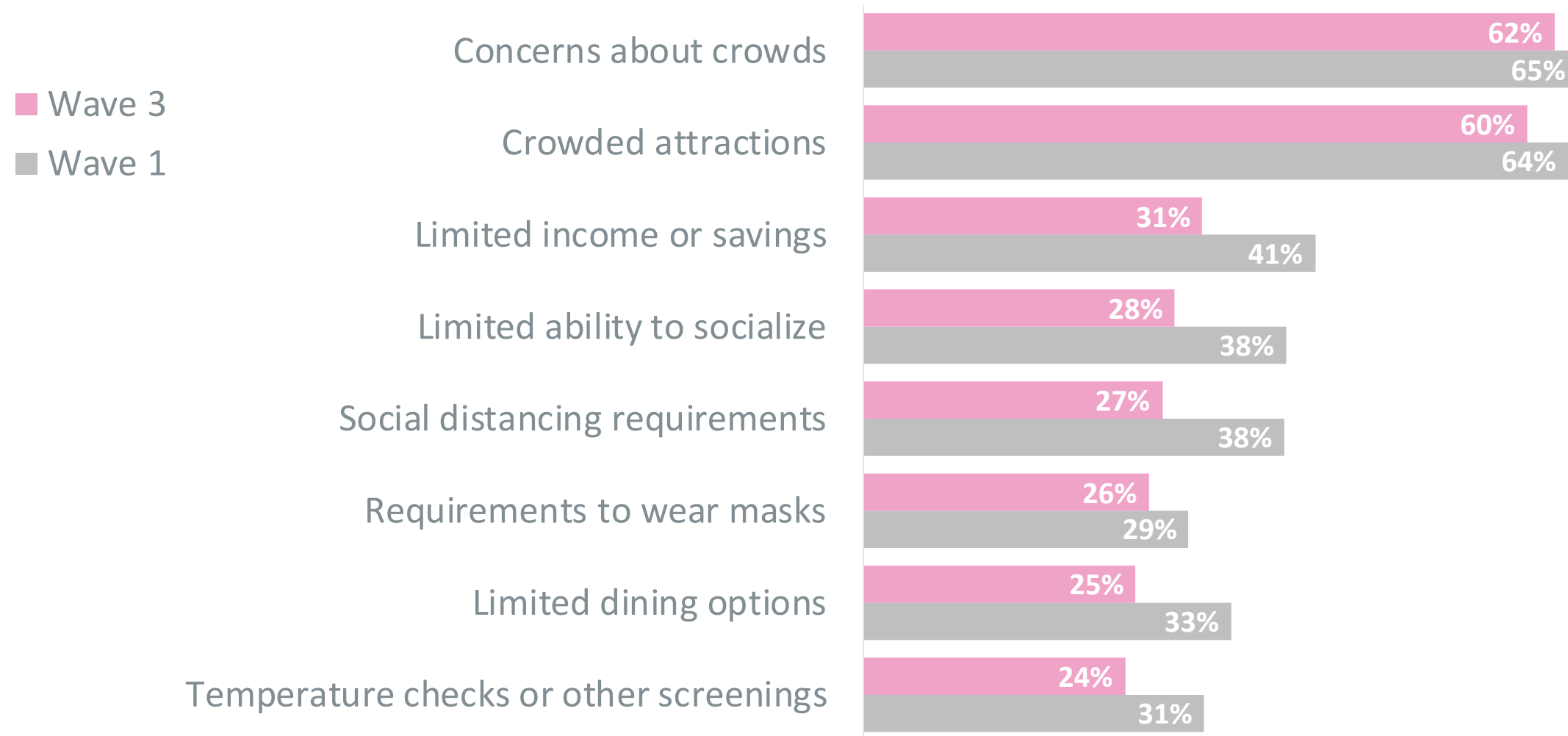
# Even after restrictions are lifted, 93% of travelers expect that concerns about crowds will continue to limit their travel.



*“What would continue to keep you from traveling even once restrictions lift?”*



# That said, as the weeks go on travelers are feeling less constrained by their concerns.

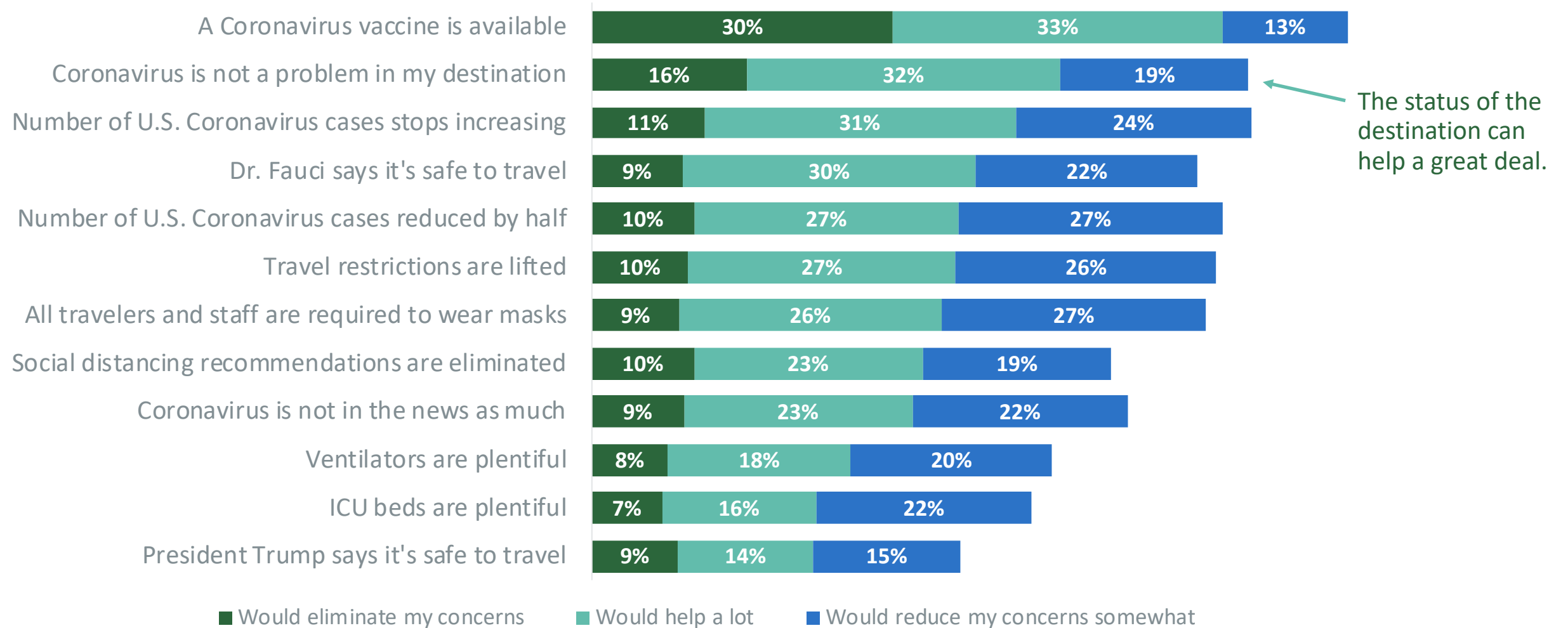


*“What would continue to keep you from traveling even once restrictions lift?”*



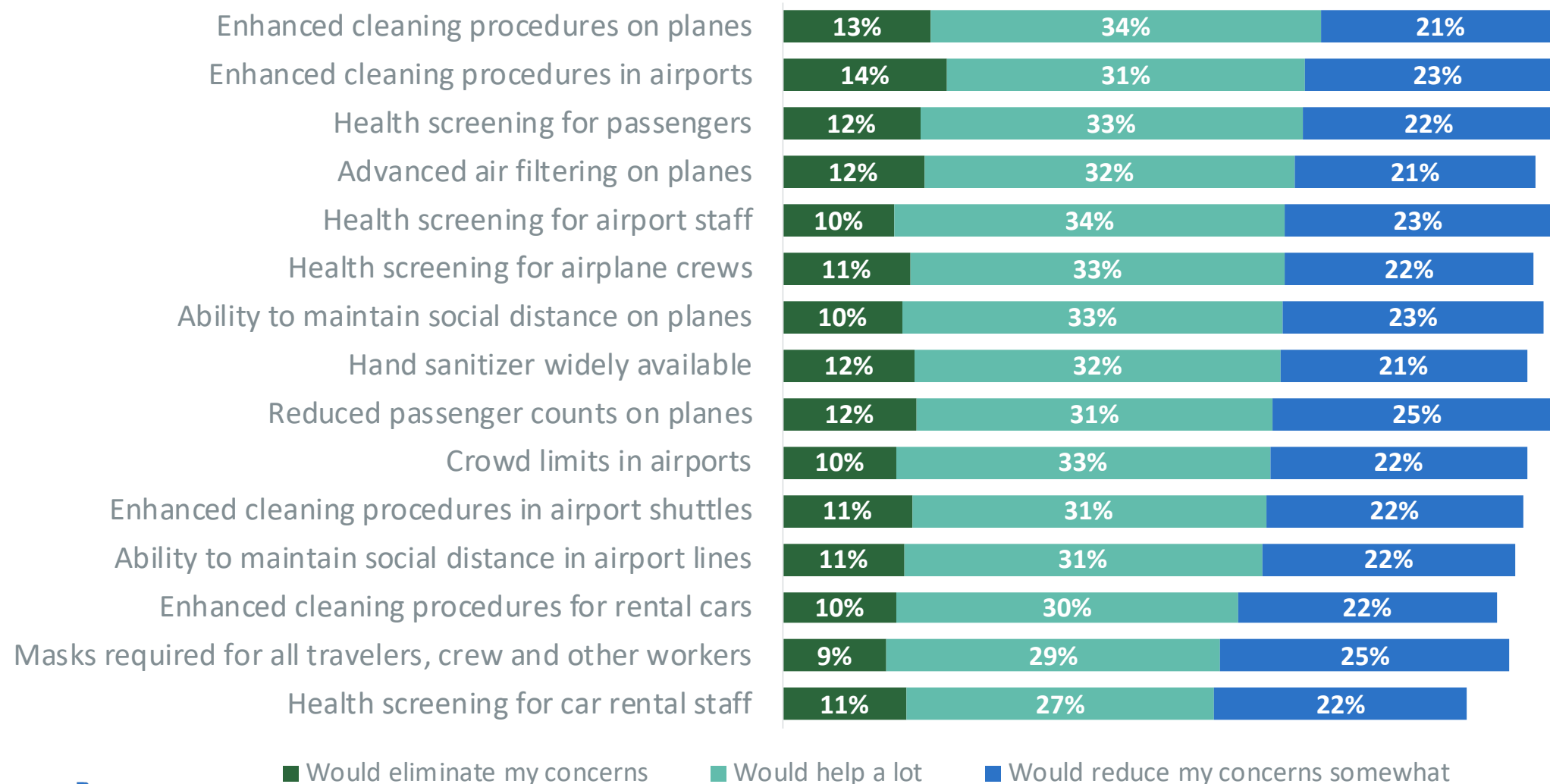
# To reduce travelers' concerns further, the status of the destination is critical, second only to availability of the vaccine.

*"To what degree would each of the following make you less concerned about travel?"*



# For flights specifically, travelers would be most relieved by enhanced cleaning procedures, health screenings and advanced air filtering.

*“To what degree would each of the following make you less concerned about taking a flight?”*

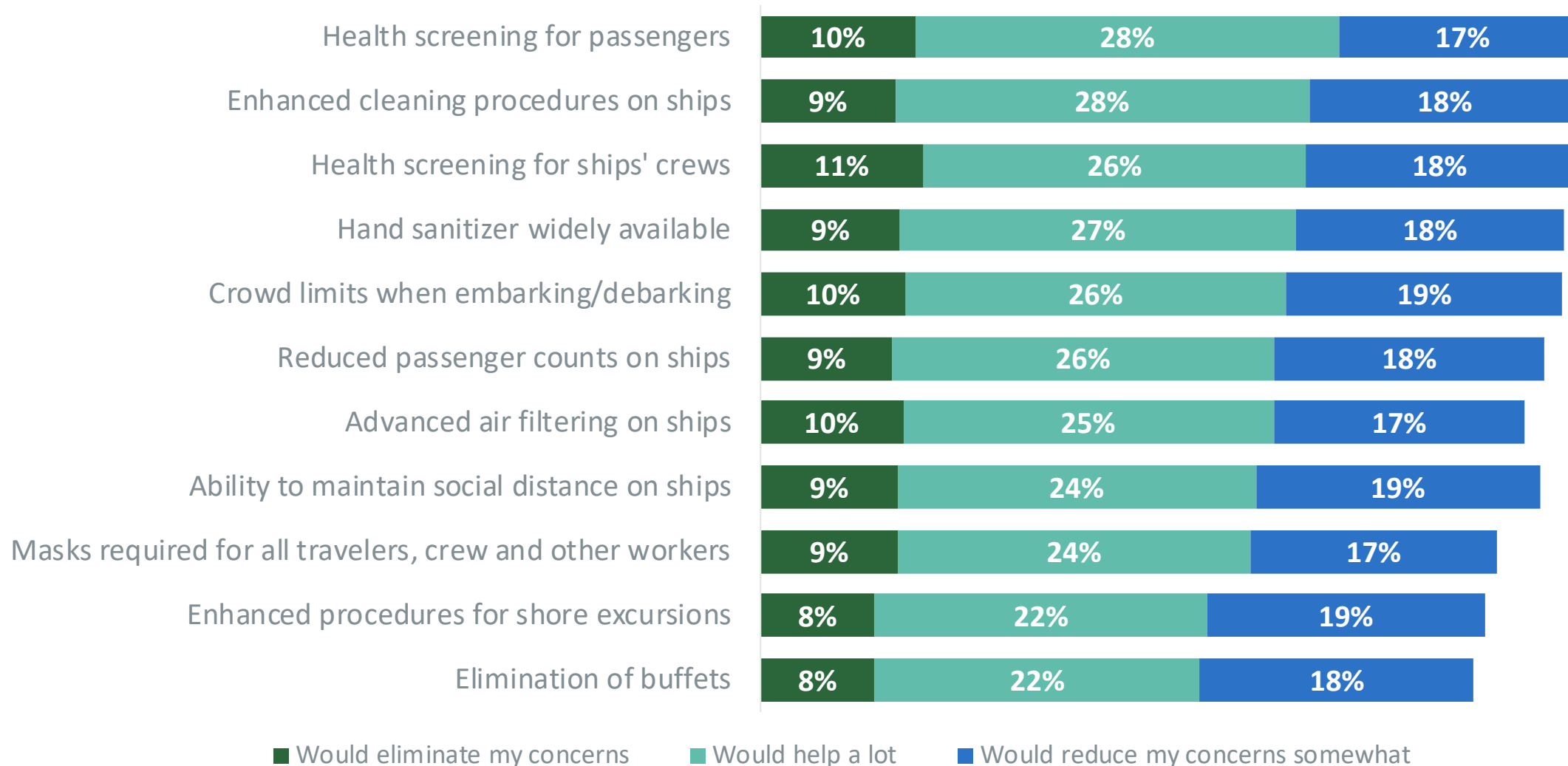


- Up to 70% of travelers believe they would be influenced by such procedures
- Airport procedures are as important to travelers as are airplane procedures



# For cruises, travelers would be most relieved by health screenings and enhanced cleaning procedures, though hand sanitizer is highly valued.

*“To what degree would each of the following make you less concerned about taking a cruise?”*



Approximately half of travelers believe their concerns could be reduced at least somewhat by such procedures



# Theme parks face daunting challenges

Here in particular, travelers need reassurance about cleanliness and crowd mitigation.



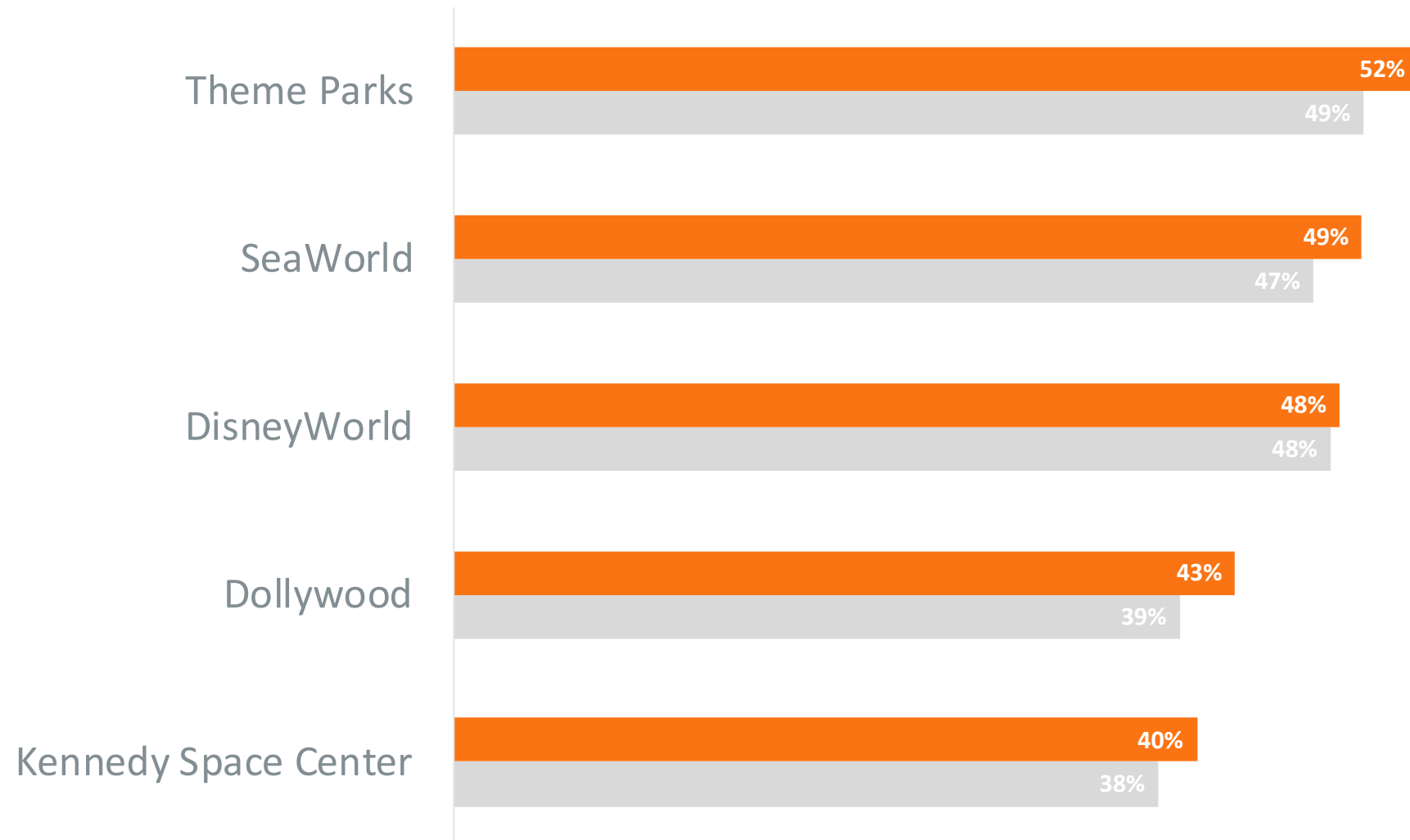


# Travelers' concerns about visiting theme parks have not diminished since mid-April.

Q: "How do concerns about Coronavirus impact your likelihood to visit the following (once they are open)?"

A: Much less likely or somewhat less likely

■ Wave 3  
■ Wave 1



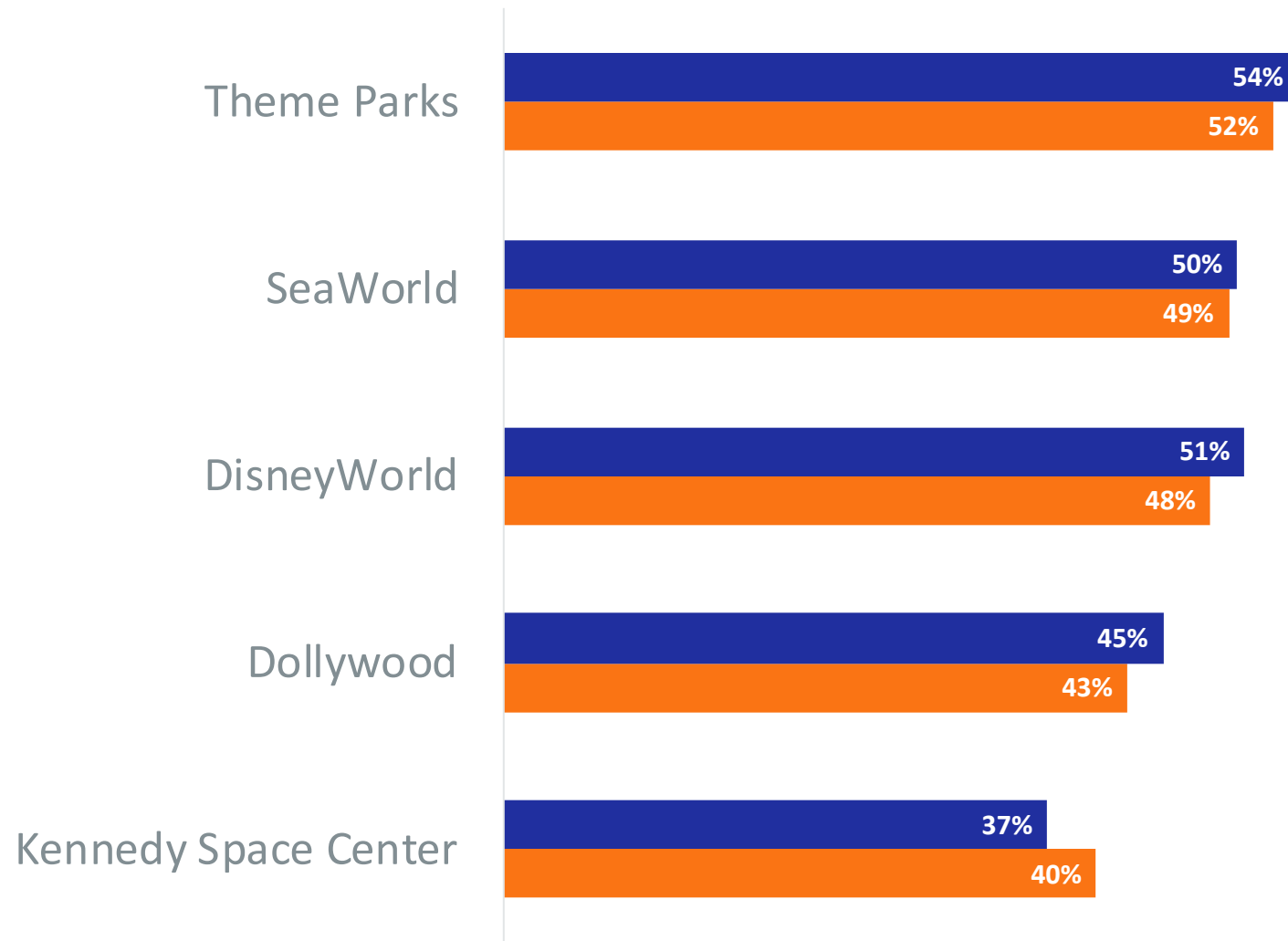
Excludes respondents who report they were never likely to visit, regardless of the Coronavirus crisis.

# Among travelers who reside in Southeast states, the impact on likelihood to visit theme parks is at least as great.

Q: “How do concerns about Coronavirus impact your likelihood to visit the following (once they are open)?”

A: Much less likely or somewhat less likely

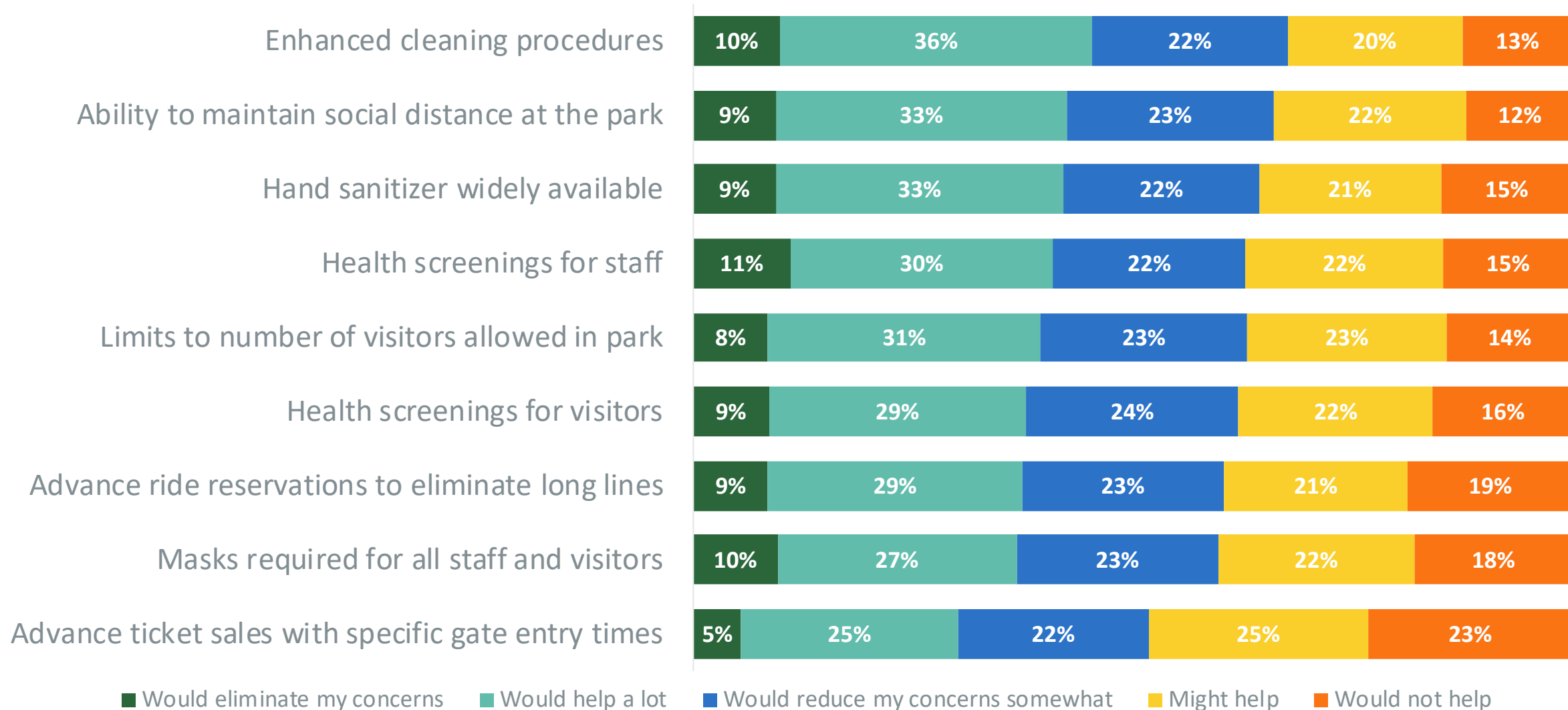
■ Wave 3: Southeast  
■ Wave 3: National Audience



Excludes respondents who report they were never likely to visit, regardless of the Coronavirus crisis.  
Wave 3, responses gathered May 17 through May 19, 2020.

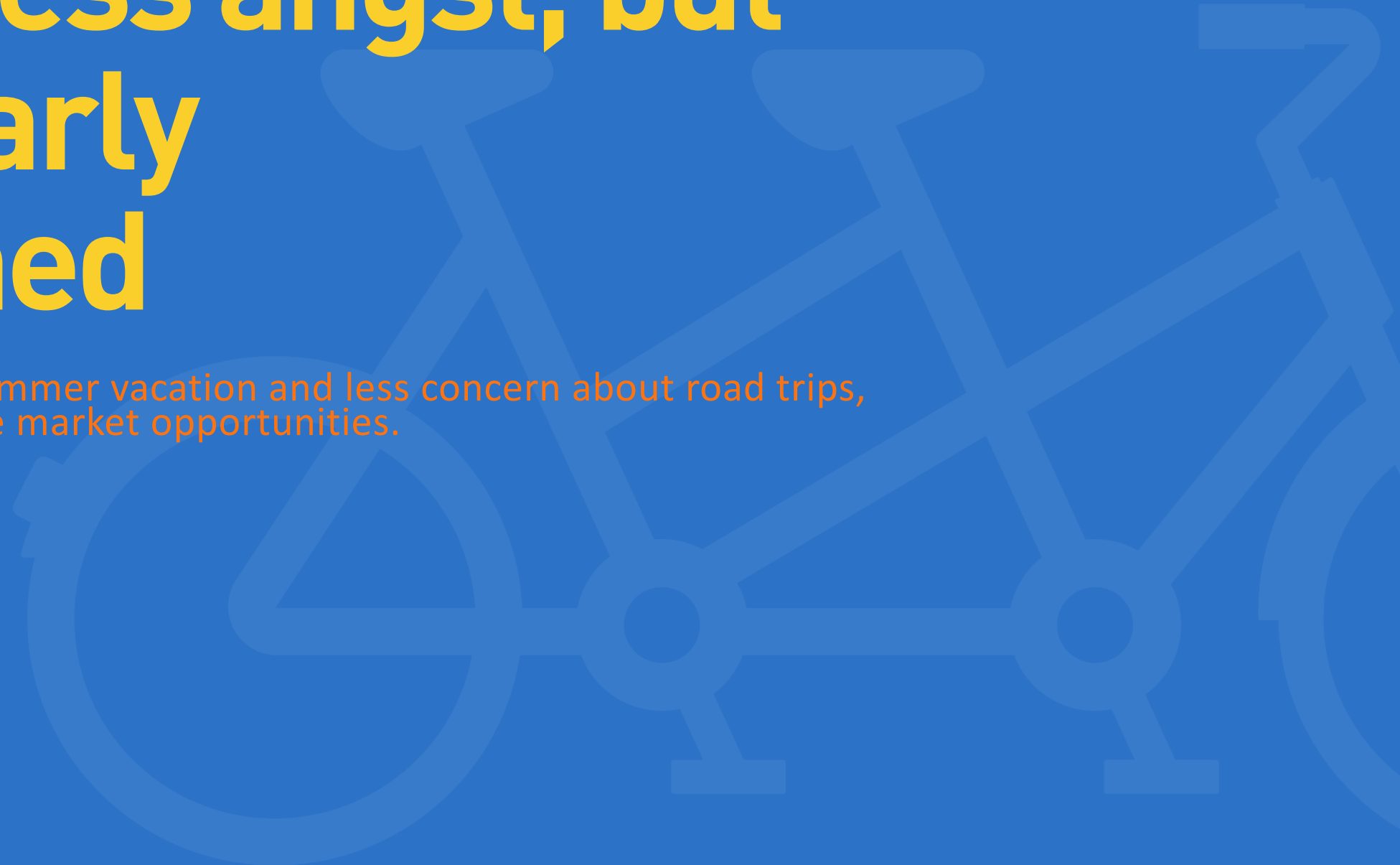
# Concerns about theme parks would be best relieved by enhanced cleaning, ability to maintain social distance and availability of hand sanitizer.

*“To what degree would each of the following make you less concerned about visiting a theme park?”*



# Southeastern travelers express less angst, but are similarly constrained

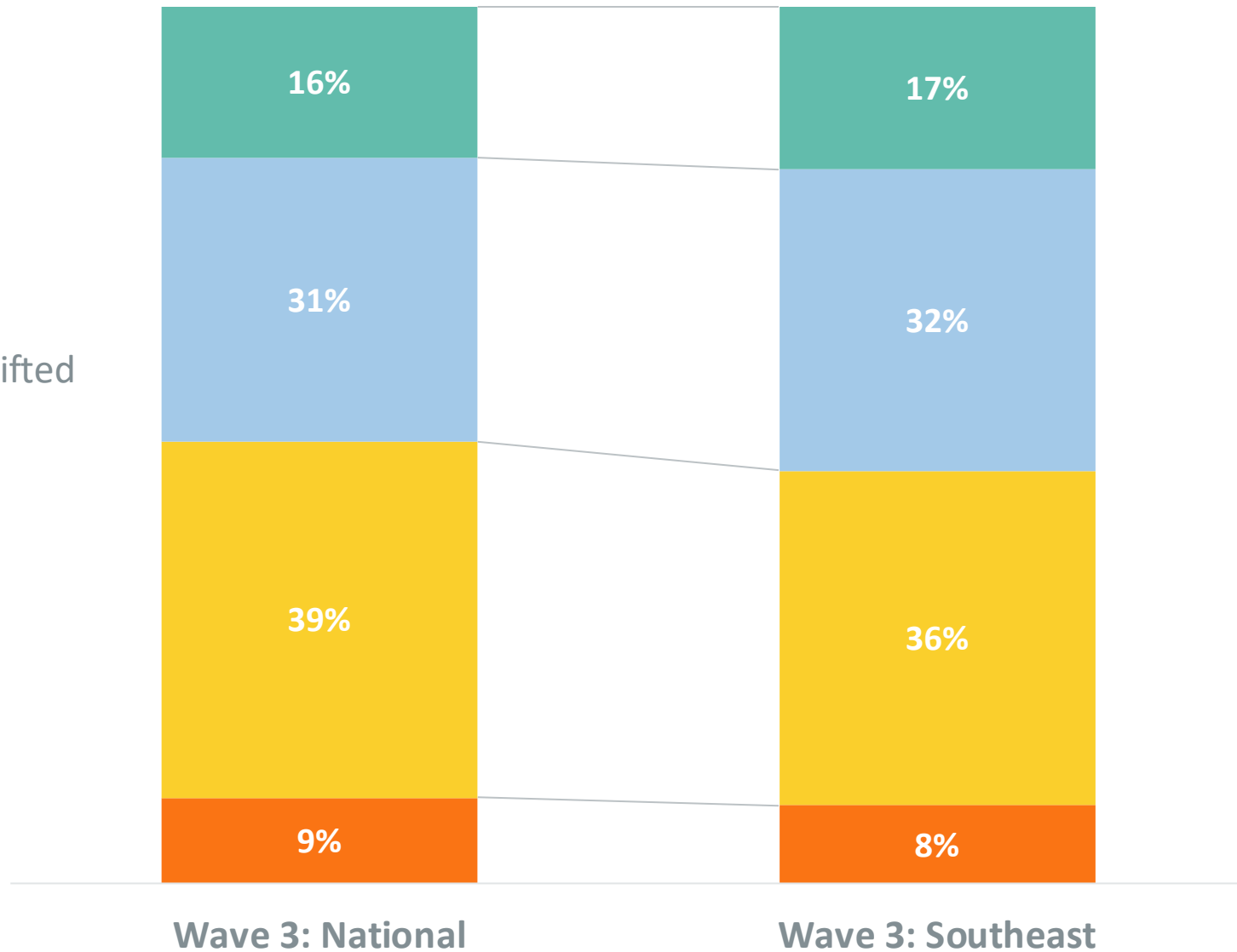
They have higher hopes for summer vacation and less concern about road trips, so we do have significant drive market opportunities.



# Southeast travelers may be slightly more ready to travel than the national audience.

When do you expect you will feel comfortable vacationing again?

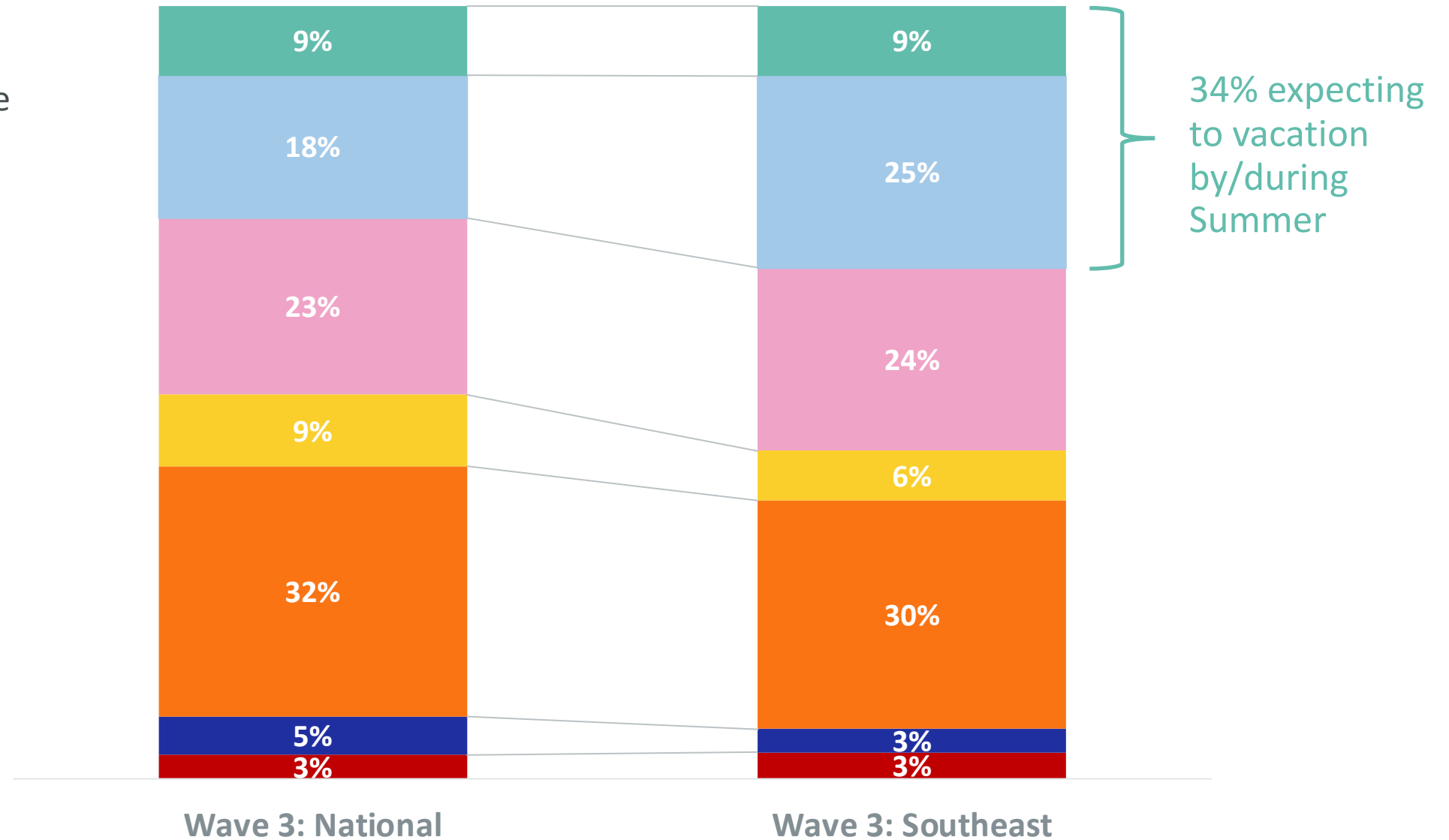
- As soon as travel restrictions are lifted
- As soon as non-essential travel is widely approved
- As soon as a vaccine is available
- Maybe never



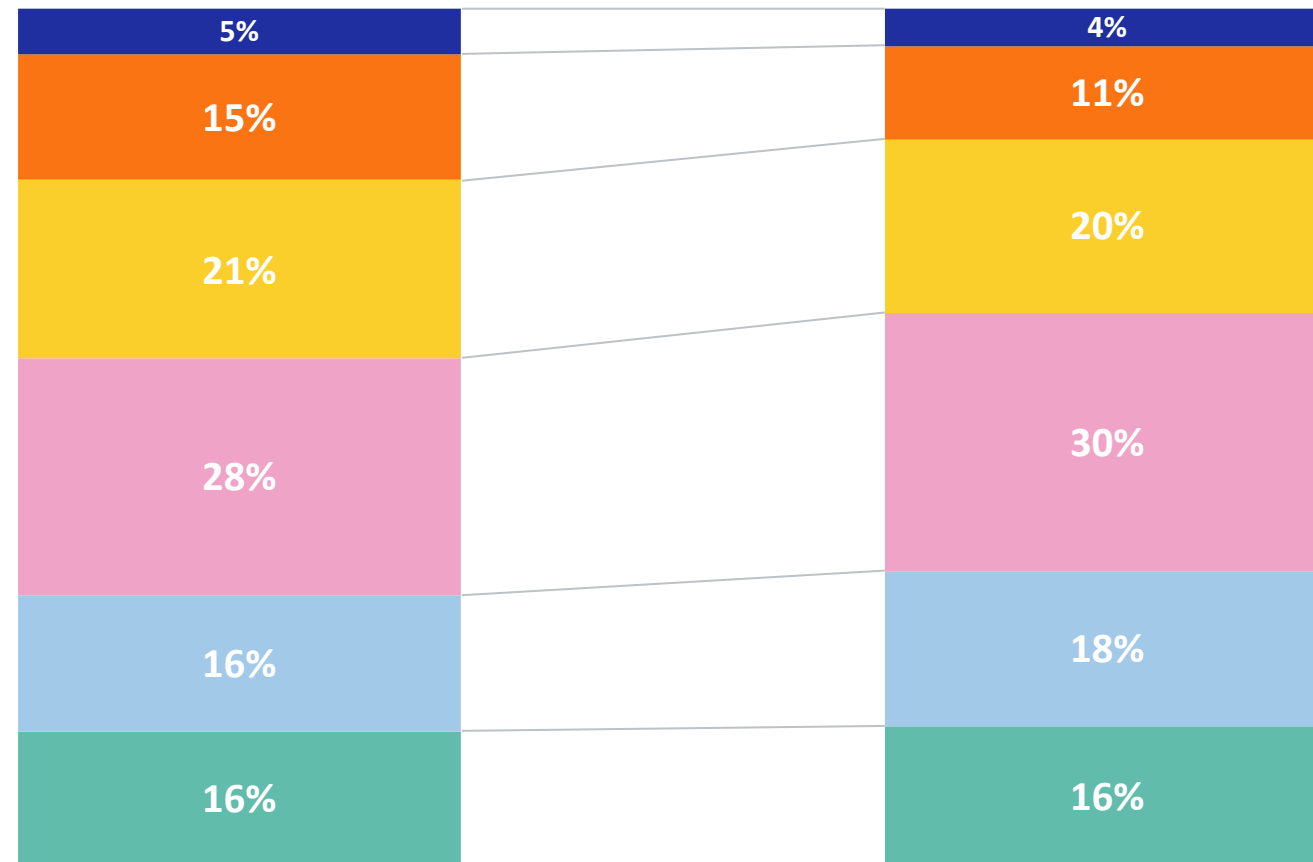
# Compared to the national audience, Southeast travelers are more confident that they will travel in Summer 2020.

How long do you think it will be before you vacation again?

- Before Summer 2020
- Not until Summer 2020
- Not until Fall 2020
- Not until the Holidays 2020
- Not until 2021
- Not until 2022
- Maybe never



# They are a bit less stressed than the average U.S. traveler under the current circumstances.



Which of the following best describes your overall mood these days?

- Extremely stressed
- Very anxious
- Worried but not overly anxious
- Occasionally or mildly worried
- Frustrated but not worried
- Content/not worried

Wave 3: National Audience

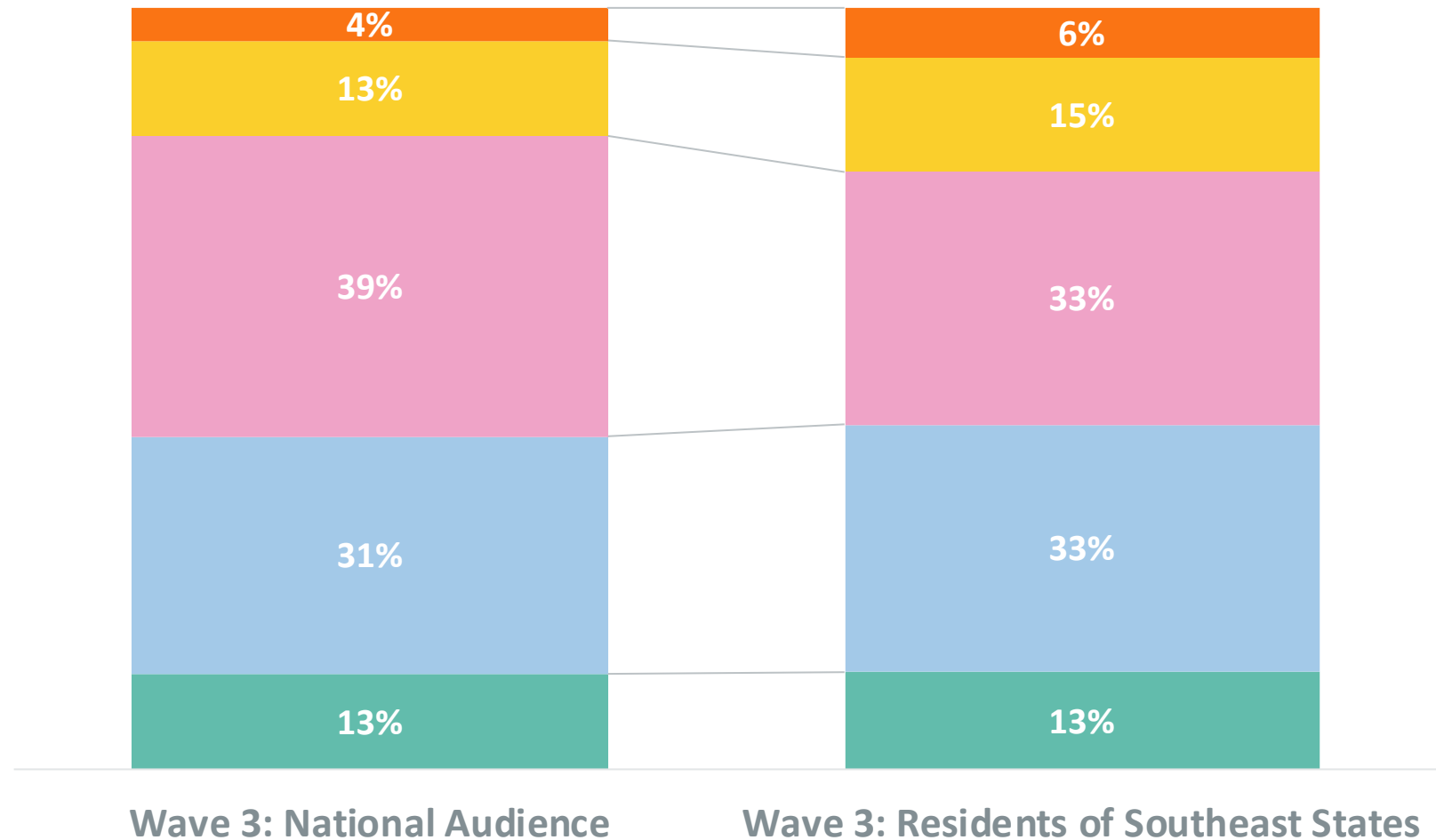
Wave 3: Residents of Southeast States



# And they are a little less likely to describe themselves as stressed under normal circumstances.

On a scale of 1 to 5, with 1 being carefree and 5 being highly stressed, how anxious do you tend to be under normal circumstances?

- 5 (Highly Stressed)
- 4
- 3
- 2
- 1 (Carefree)

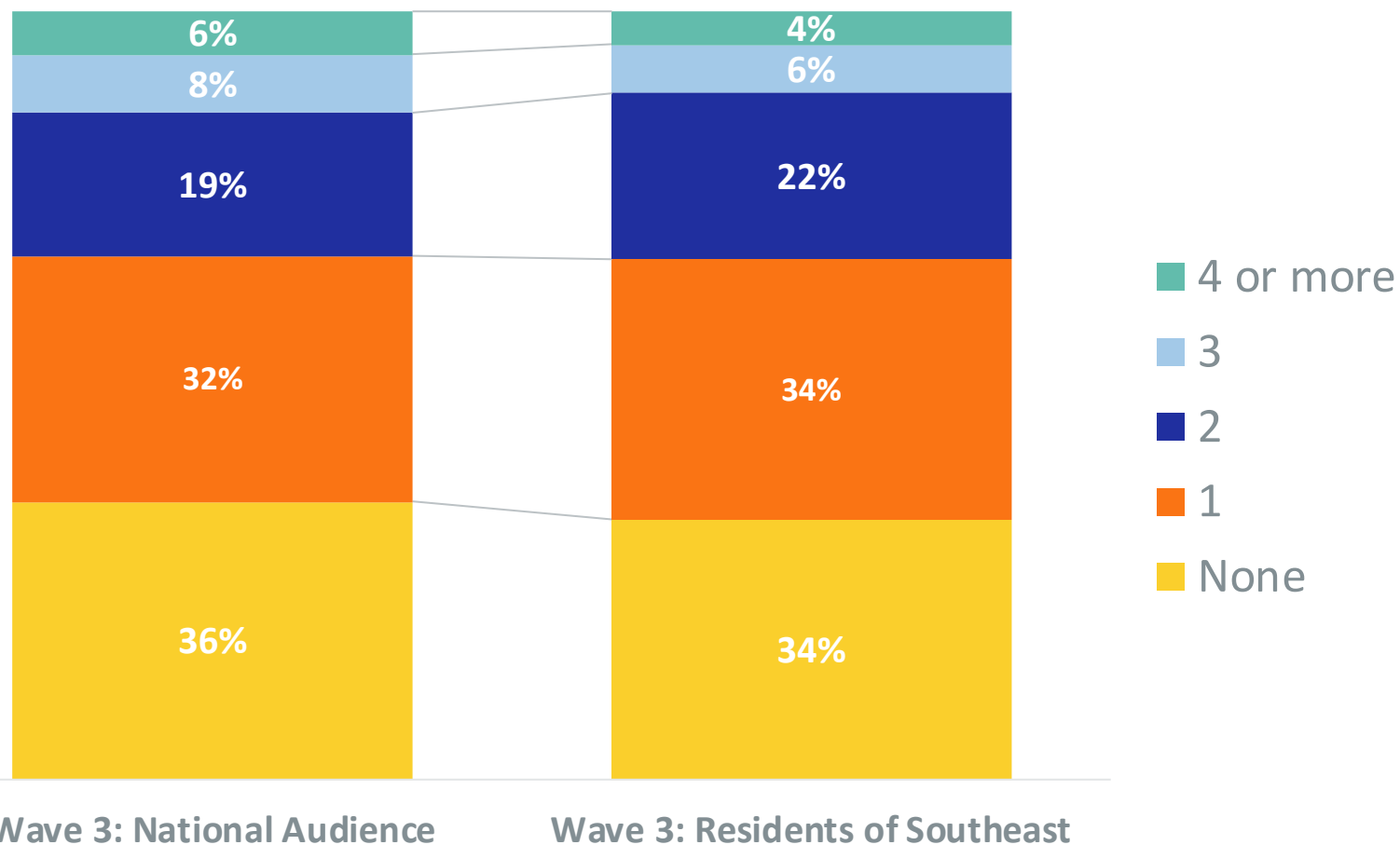




# But, as of mid-May, they are very similar to the national audience in terms of the number of trips they expect to take in 2020.

1.14 trips in 2020  
average expected per traveler

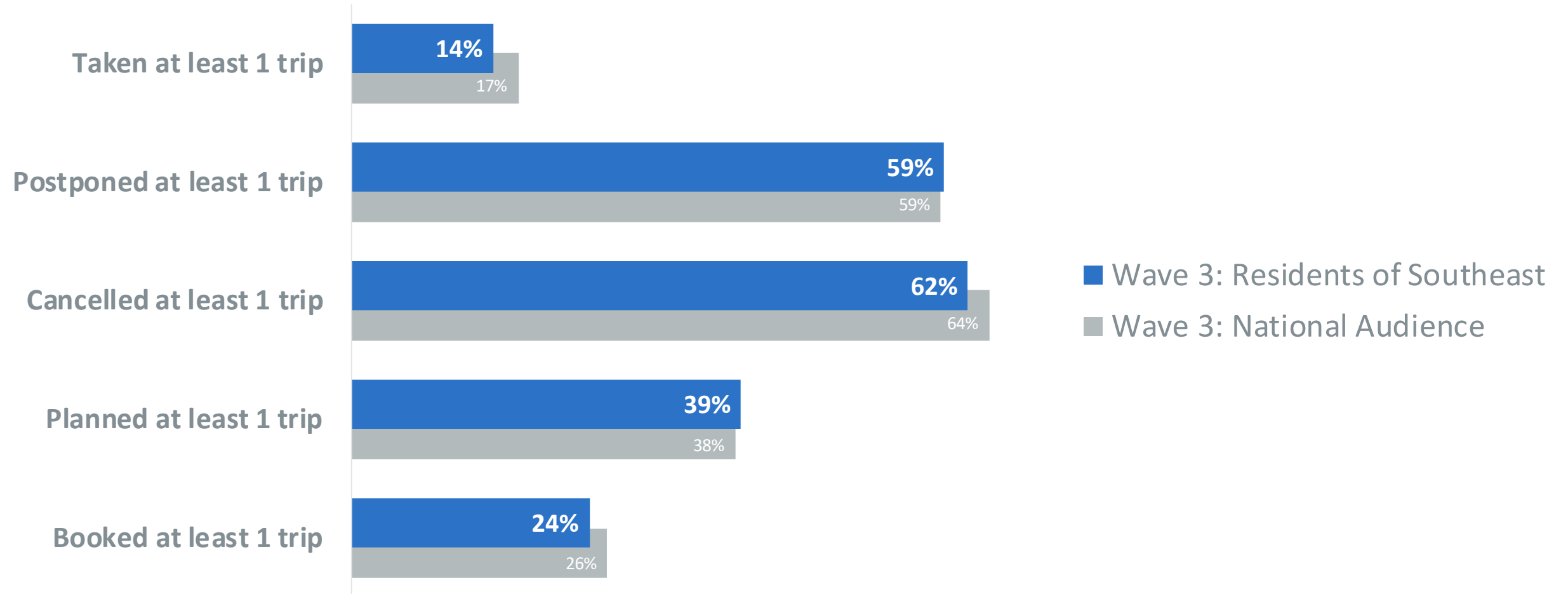
1.13 trips in 2020  
average expected per traveler



*“At this point, how many vacations or leisure trips do you expect you will take in 2020?”*



# Their travel behaviors since the crisis began are similar.



“Since the Coronavirus crisis began, how many trips have you \_\_\_\_\_?”

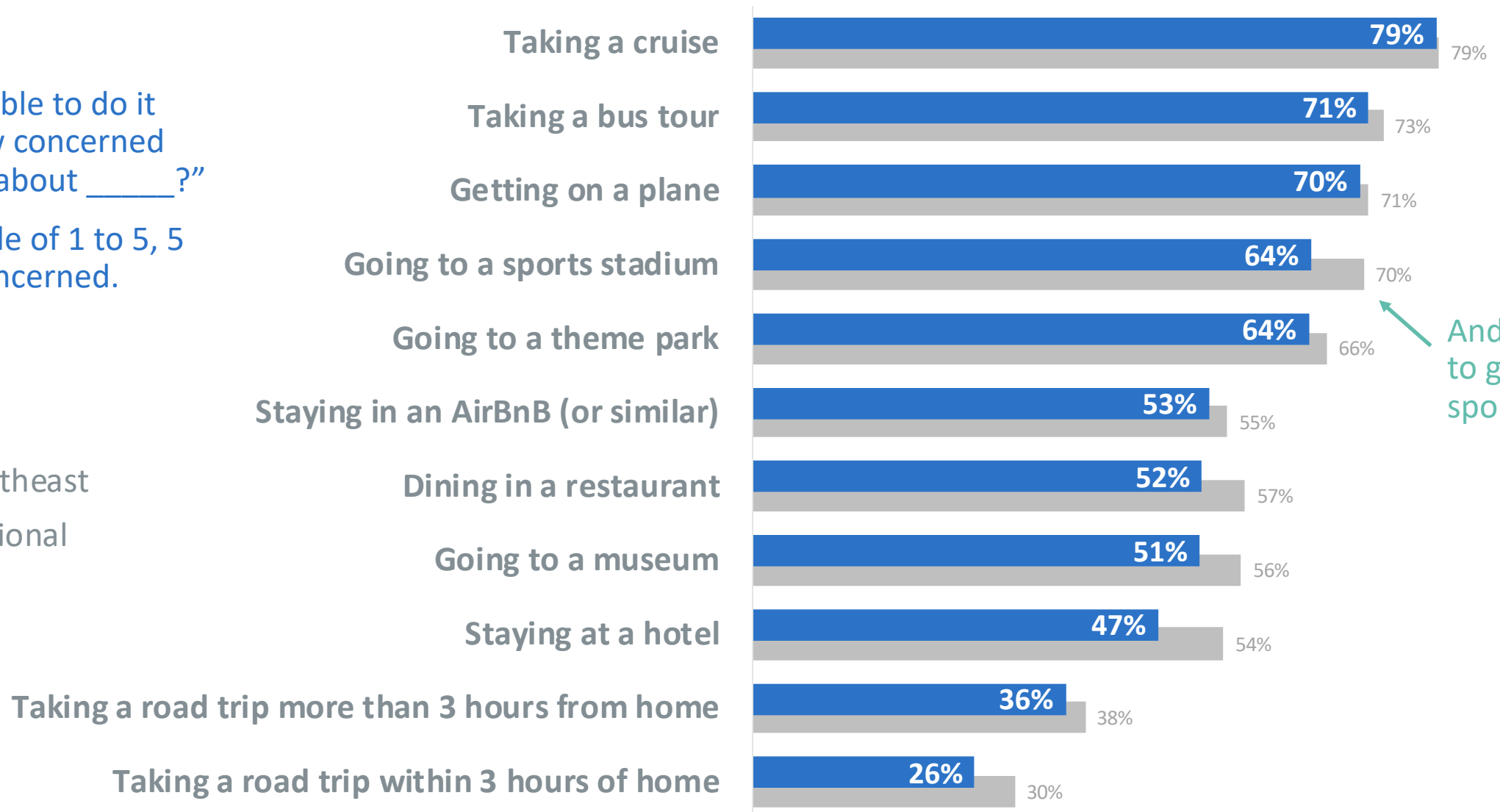


# They are somewhat less concerned than the national audience about restaurants, hotels, museums and short road trips.

Q: “If it was possible to do it right now, how concerned would you be about \_\_\_\_\_?”

A: 4 or 5 on a scale of 1 to 5, 5 being most concerned.

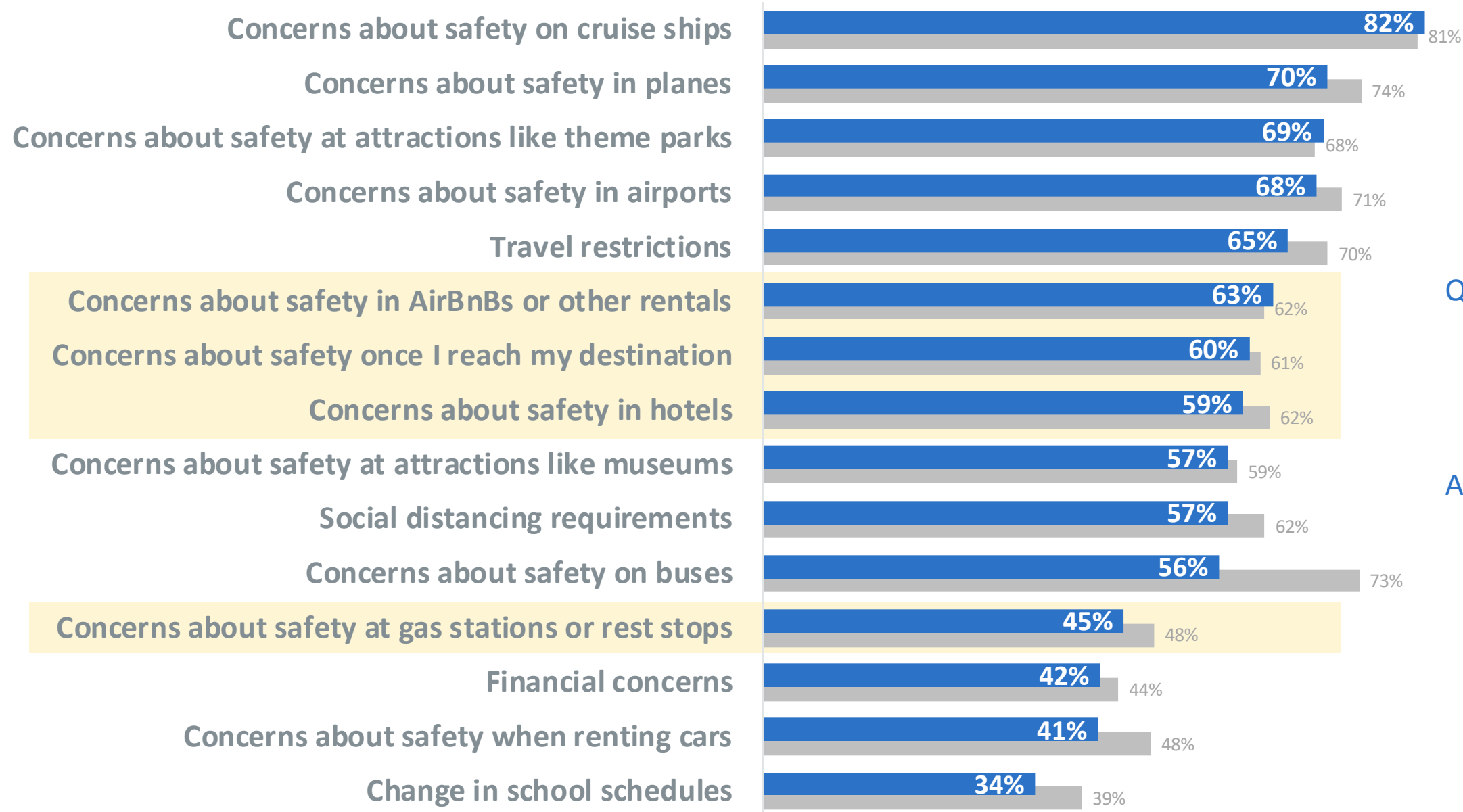
- Wave 3: Southeast
- Wave 3: National



And less inclined to give up sports!



# But they are highly likely to be limited by their safety concerns – even those they are likely to face when considering road trips.



Q: “On a scale of 1 to 5, with 5 being most likely, to what degree are the following likely to limit your travel this year?”

A: 4 or 5

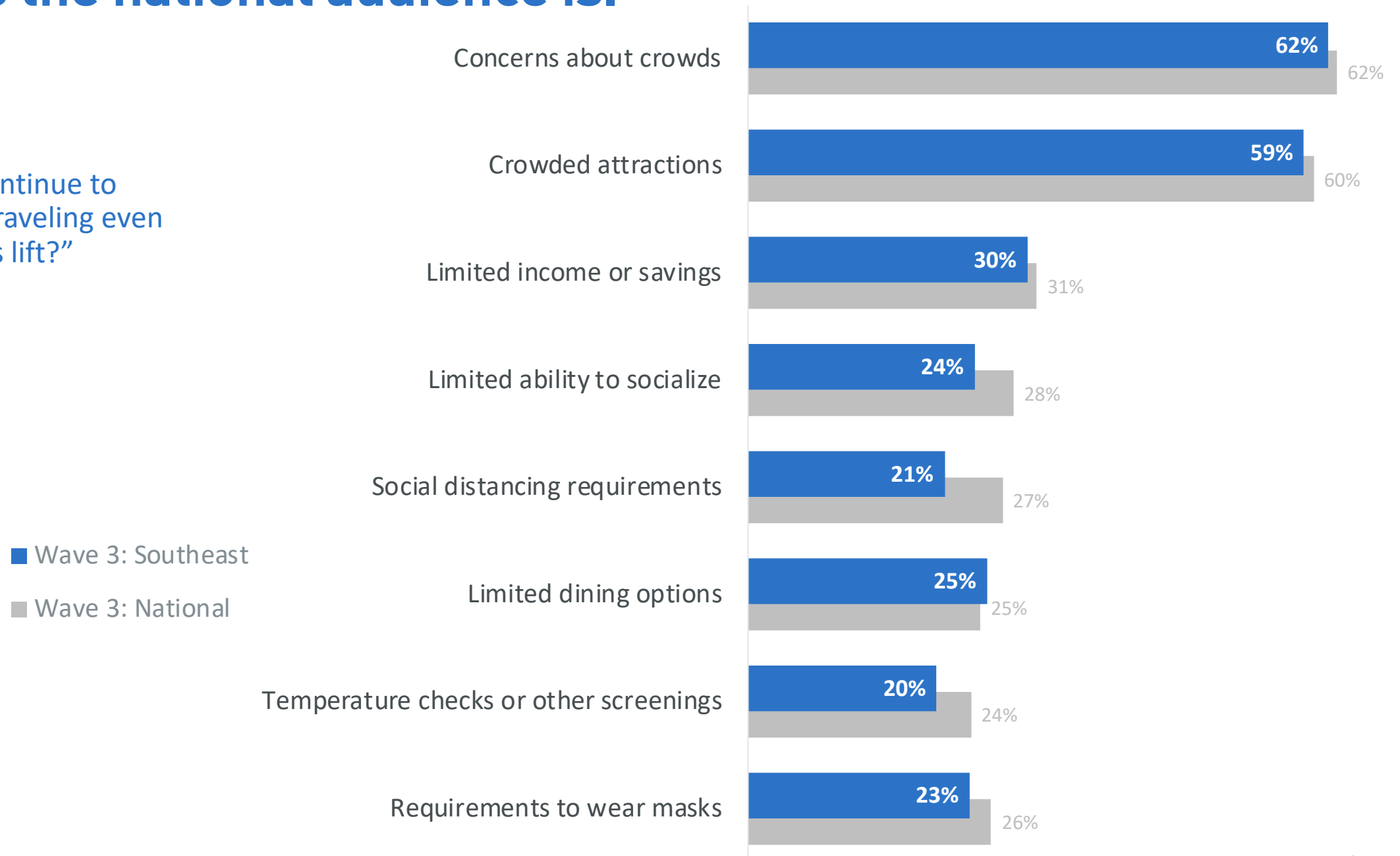
■ Wave 3: Southeast  
■ Wave 3: National



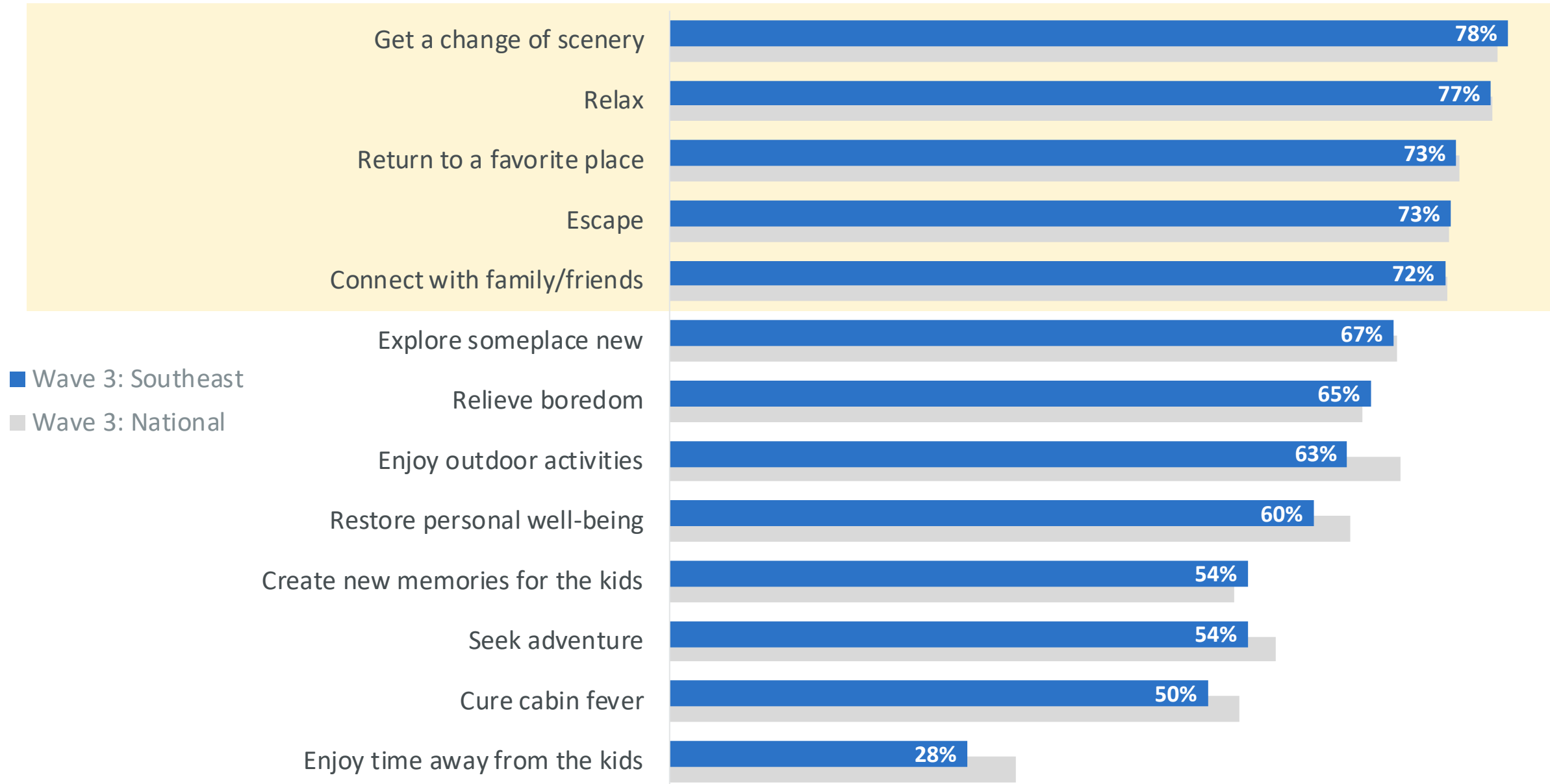
# Travelers from the Southeast are as concerned about crowds as the national audience is.

Q: “What would continue to keep you from traveling even once restrictions lift?”

A: Very much so



# Southeast travelers' motivations are very similar to those of the national audience.



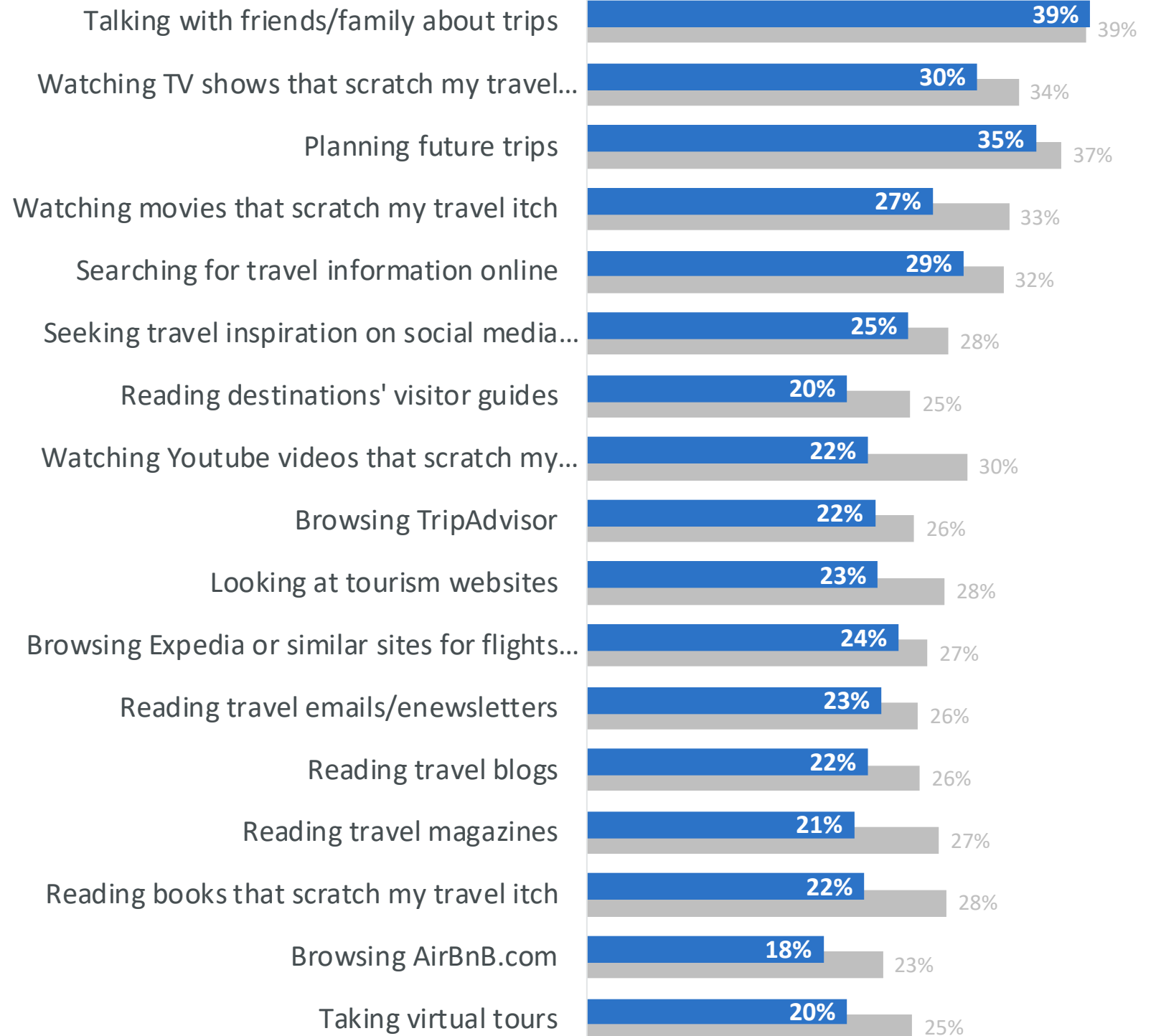
Q: "On a scale of 1 to 5, 5 being a very strong motivator, what are the reasons you will be eager to travel once restrictions lift?" A: 4 or 5.

# But they are less likely to be actively trying to fulfill their travel bugs.

Q: “What, if anything, are you doing to fulfill your travel bug while travel opportunities are limited?”

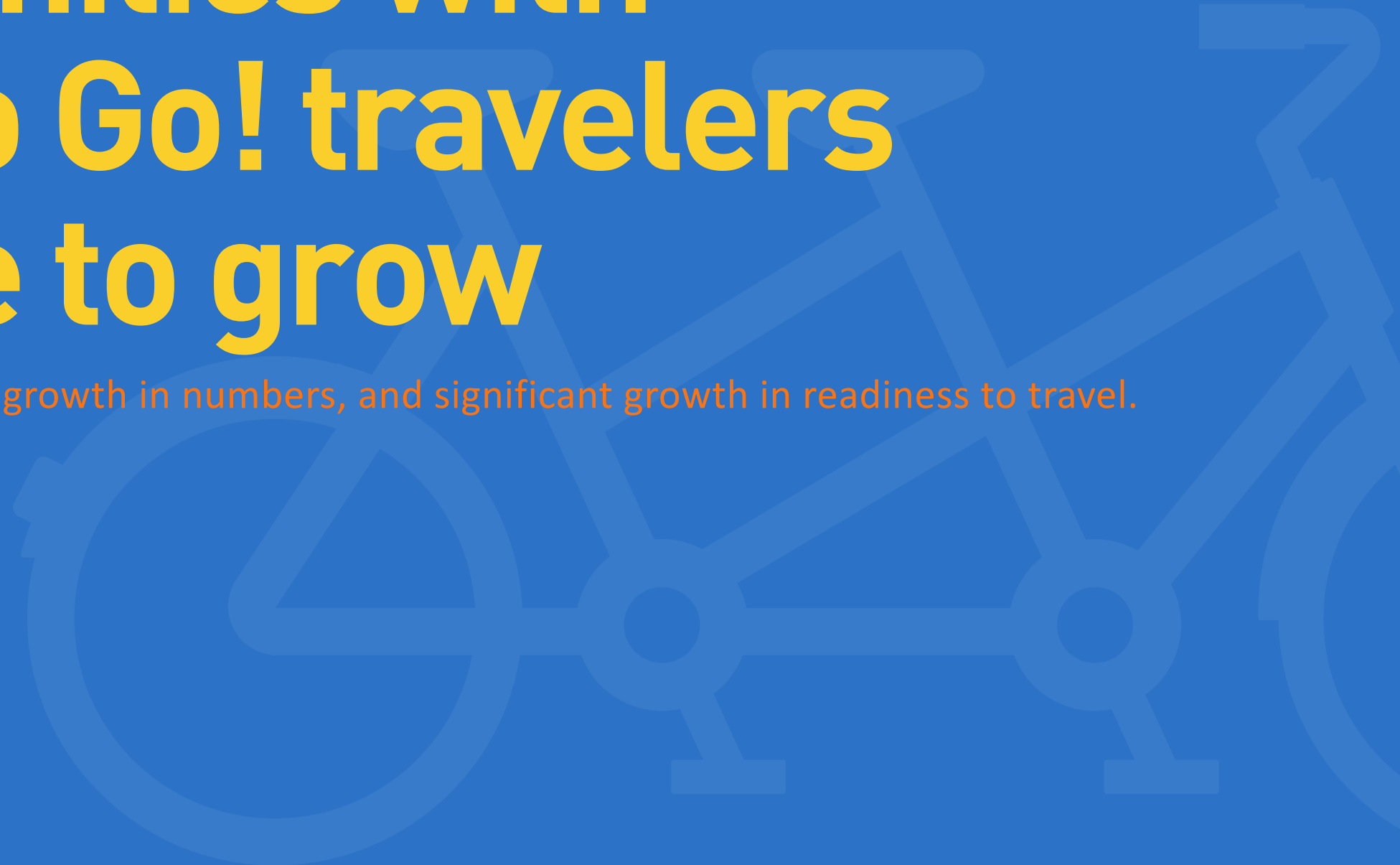
A: All the time, very frequently or often

■ Wave 3: Southeast  
■ Wave 3: National



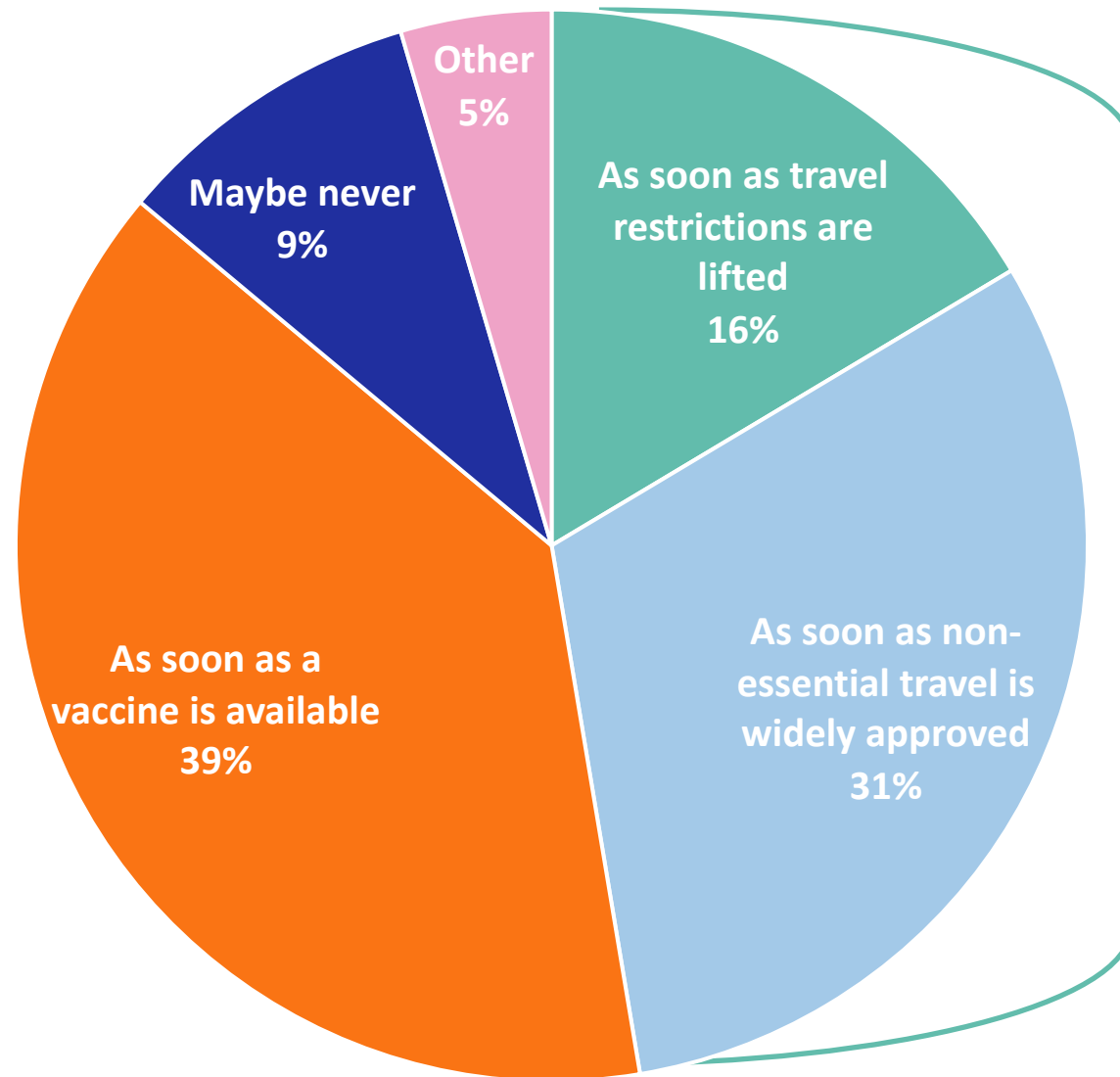
# Opportunities with Ready to Go! travelers continue to grow

The segment is showing slight growth in numbers, and significant growth in readiness to travel.





# 47% of travelers surveyed said they will be ready to vacation as soon as non-essential travel is widely approved, if not before.

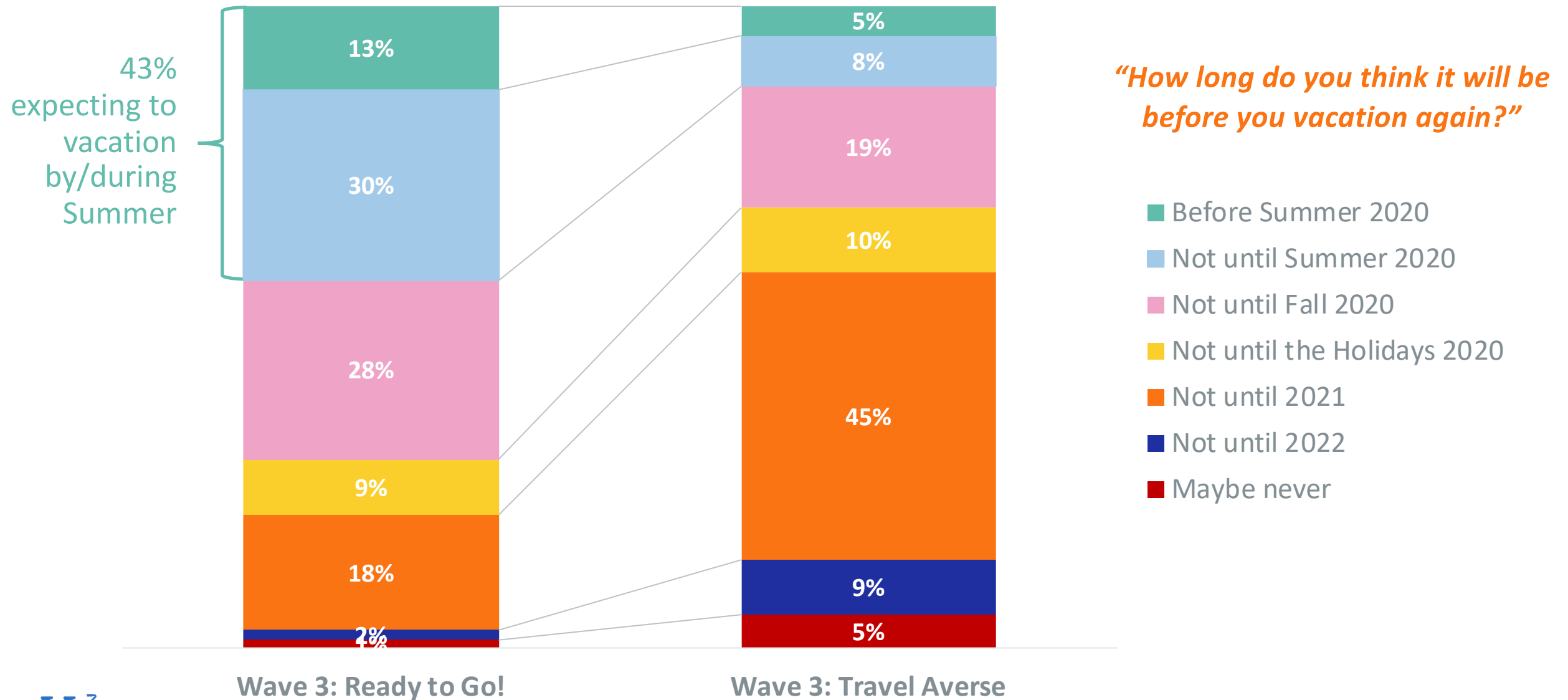


*“When do you expect you will feel comfortable vacationing again?”*

**“Ready to Go!”**  
Travelers Most Likely to Resume Travel Quickly



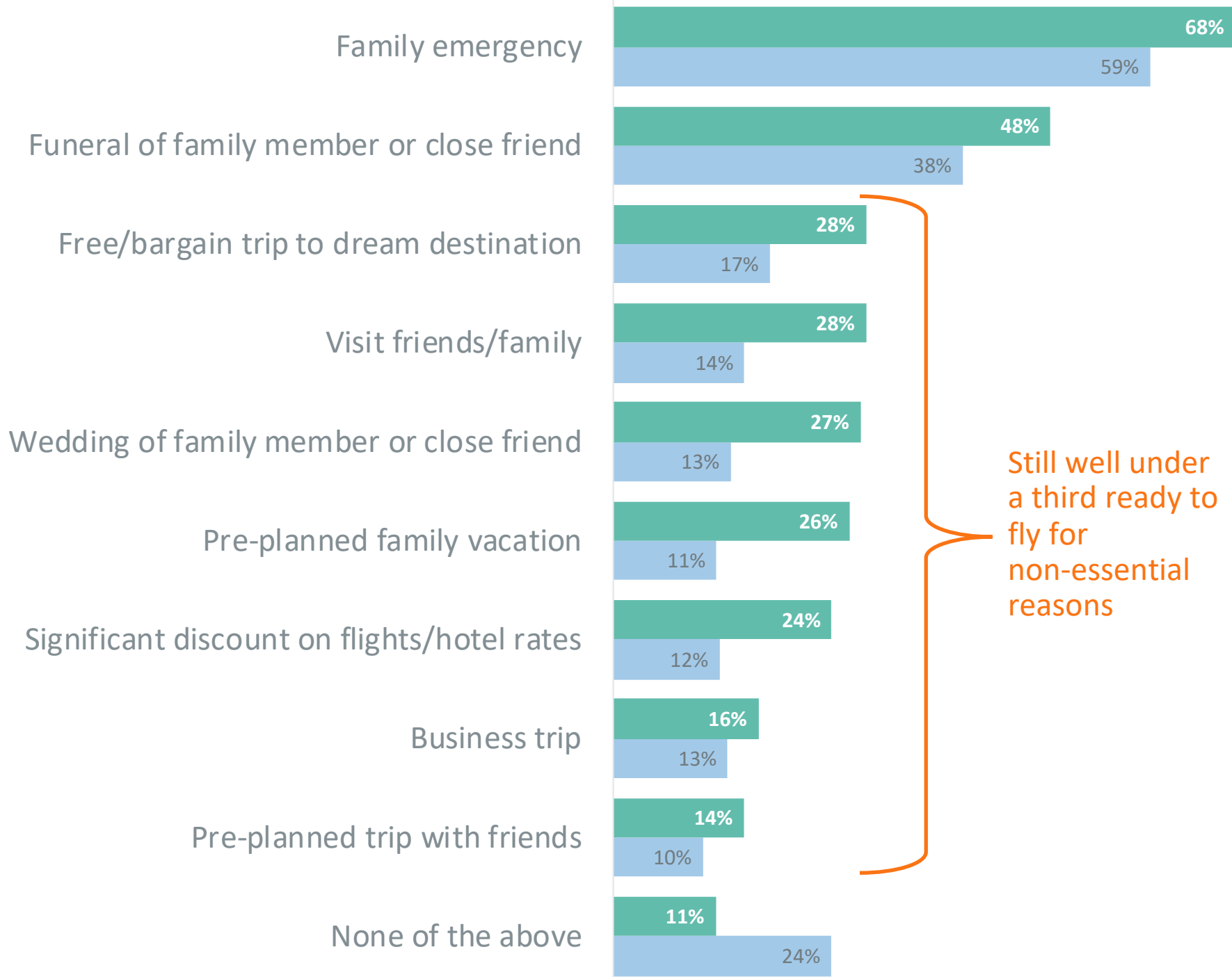
# Ready to Go! travelers are much more confident that they will vacation this summer.



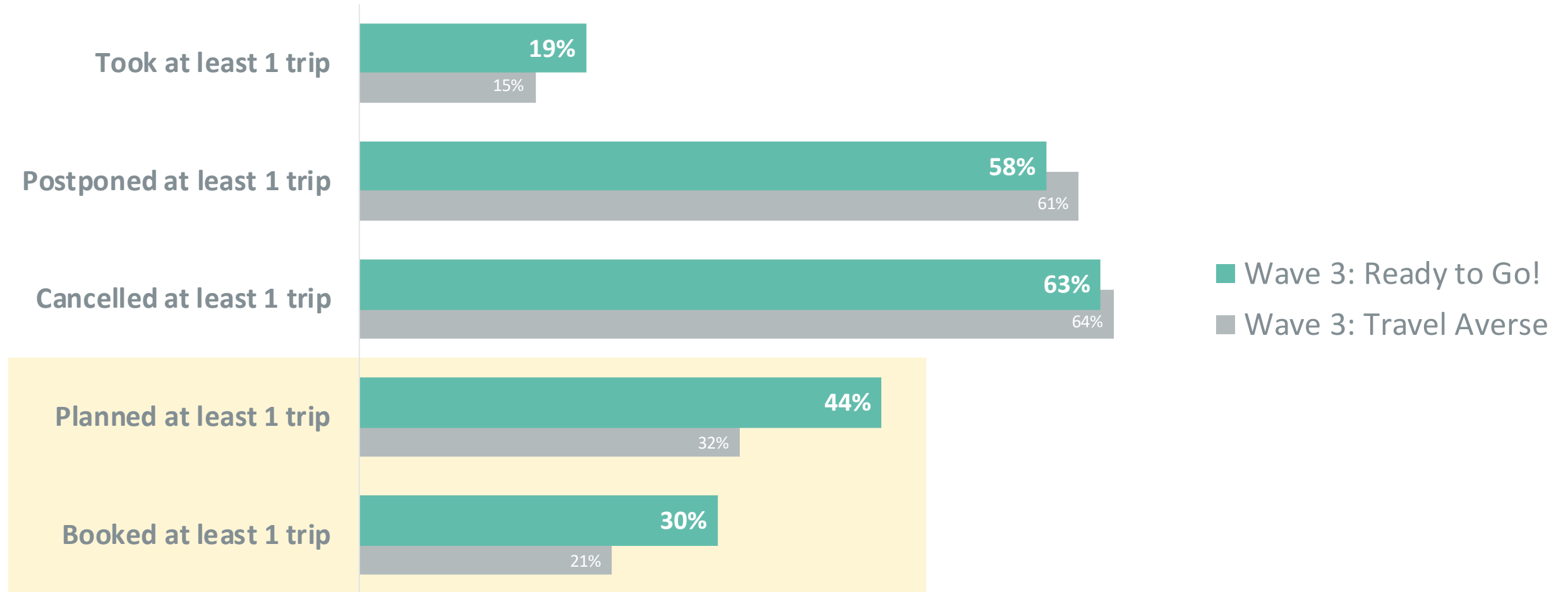
# They are much more inclined to pursue travel opportunities, even those involving flights.

*“What would make you get on a plane right now?”*

■ Wave 3: Ready to Go!  
 ■ Wave 3: Travel Averse



# Ready to Go! travelers are much more likely to have planned and booked trips since the crisis began.



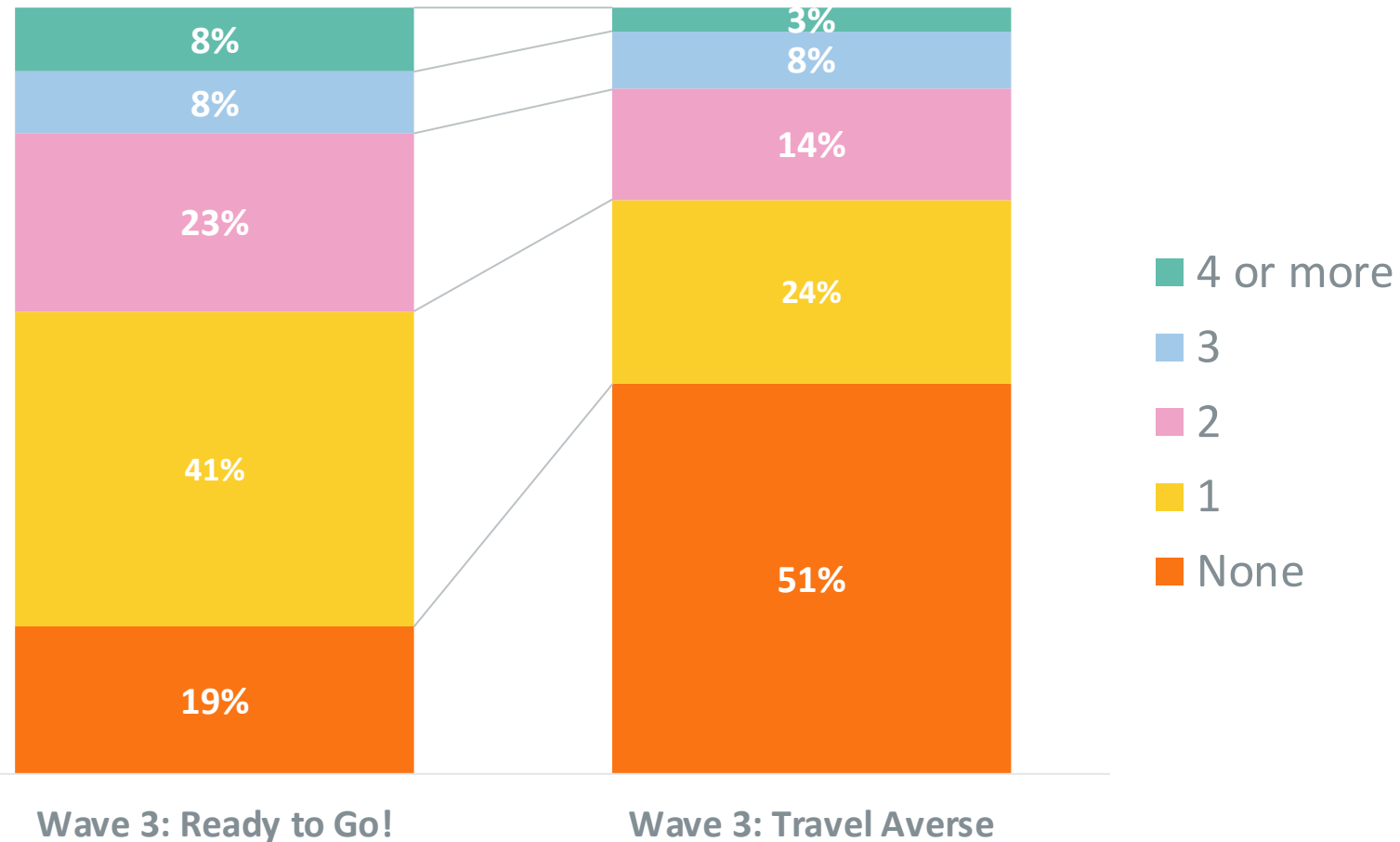
*“Since the Coronavirus crisis began, how many trips have you \_\_\_\_\_?”*



# And they expect to travel significantly more this year than the Travel Averse respondents do.

1.45 trips in 2020  
average expected per traveler

0.88 trips in 2020  
average expected per traveler

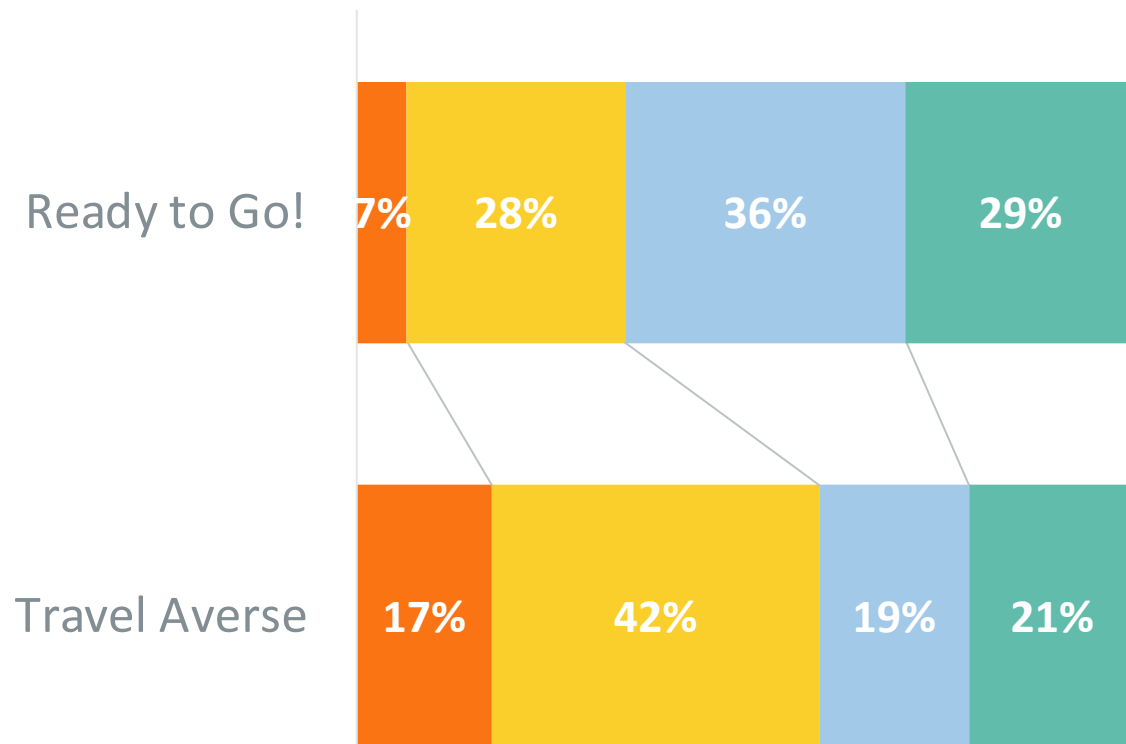


*“At this point, how many vacations or leisure trips do you expect you will take in 2020?”*

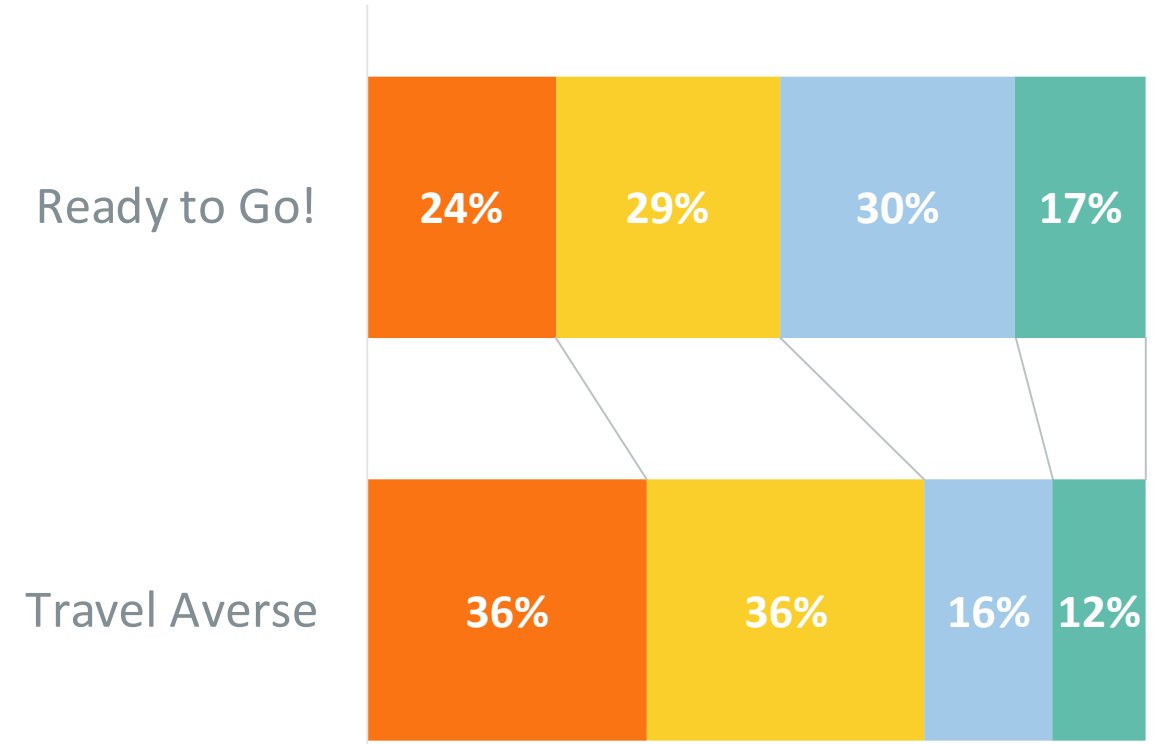


# Far more than their more reluctant counterparts, travelers who are Ready to Go! are dreaming and planning.

## Thinking About Travel



## Info Gathering/Exploring

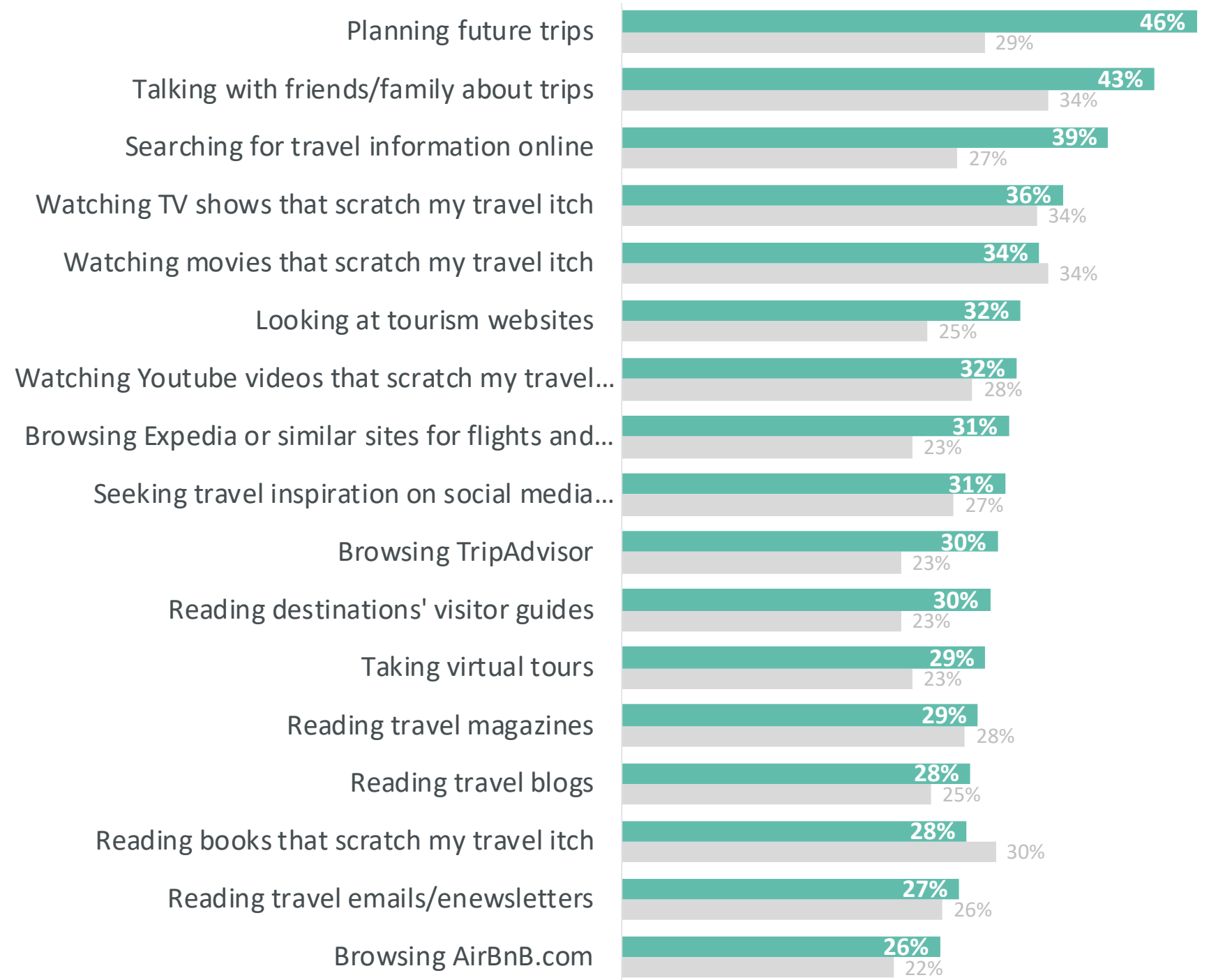


■ Not at all ■ Less than usual ■ The same as usual ■ More than usual



# Ready to Go! travelers are more actively pursuing key travel planning and dreaming behaviors.

■ Wave 3: Ready to Go!  
 ■ Wave 3: Travel Averse



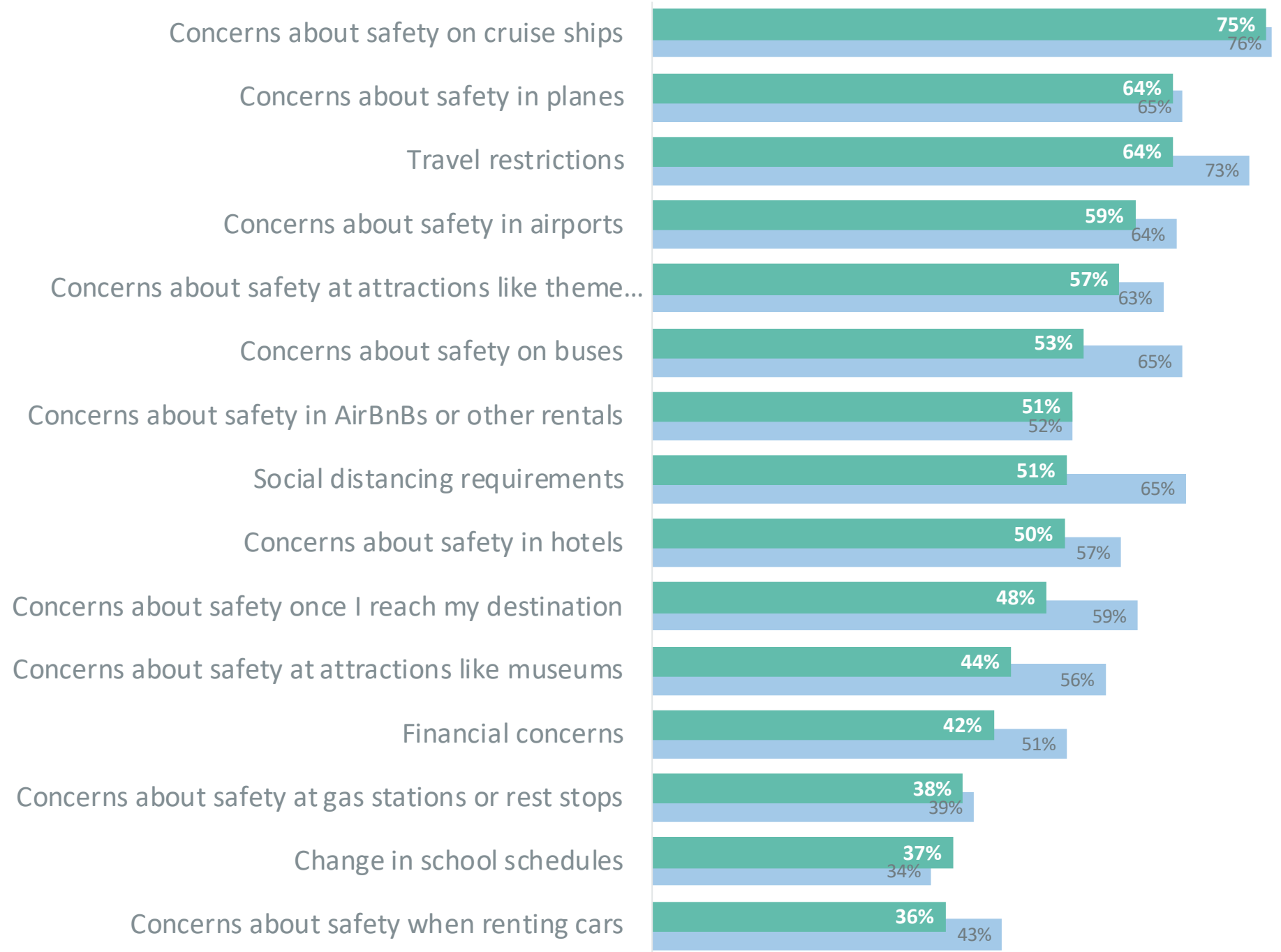
Q: "What, if anything, are you doing to fulfill your travel bug while travel opportunities are limited?" A: All the time, very frequently or often.

# Though “Ready to Go!” travelers still have concerns, most have decreased significantly over time.

**Q: “On a scale of 1 to 5, with 5 being most likely, to what degree are the following likely to limit your travel this year?”**

**A: 4 or 5**

■ Wave 3: Ready to Go!  
 ■ Wave 1: Ready to Go!



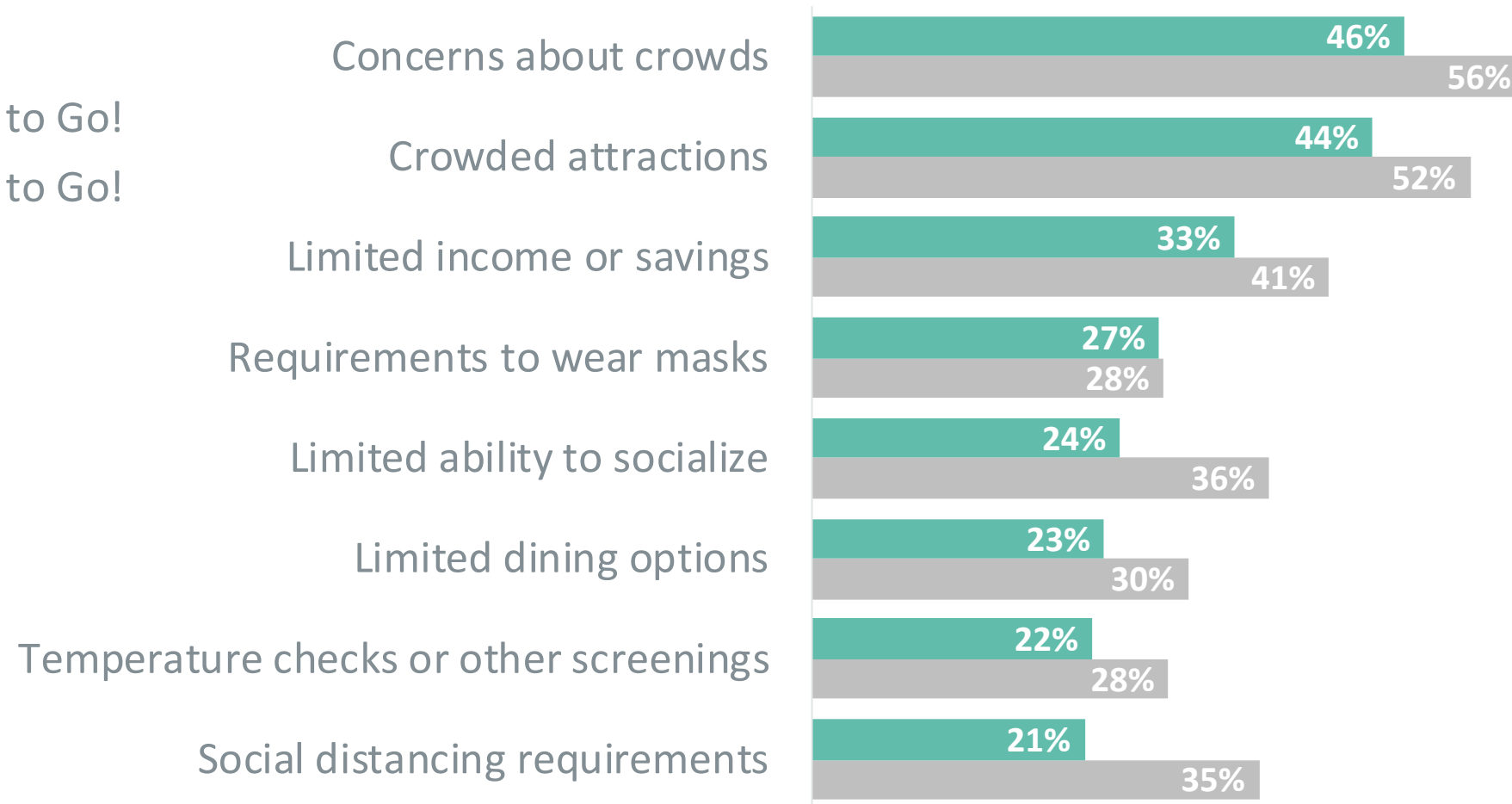
Note: Concerns about safety in buses is reported for Wave 2, not Wave 1.





# And as their concerns decline, they expect to be less constrained.

■ Wave 3: Ready to Go!  
■ Wave 1: Ready to Go!



**Q: “What would continue to keep you from traveling even after restrictions lift?” A: Very much so**

# Who are the Ready to Go! travelers?

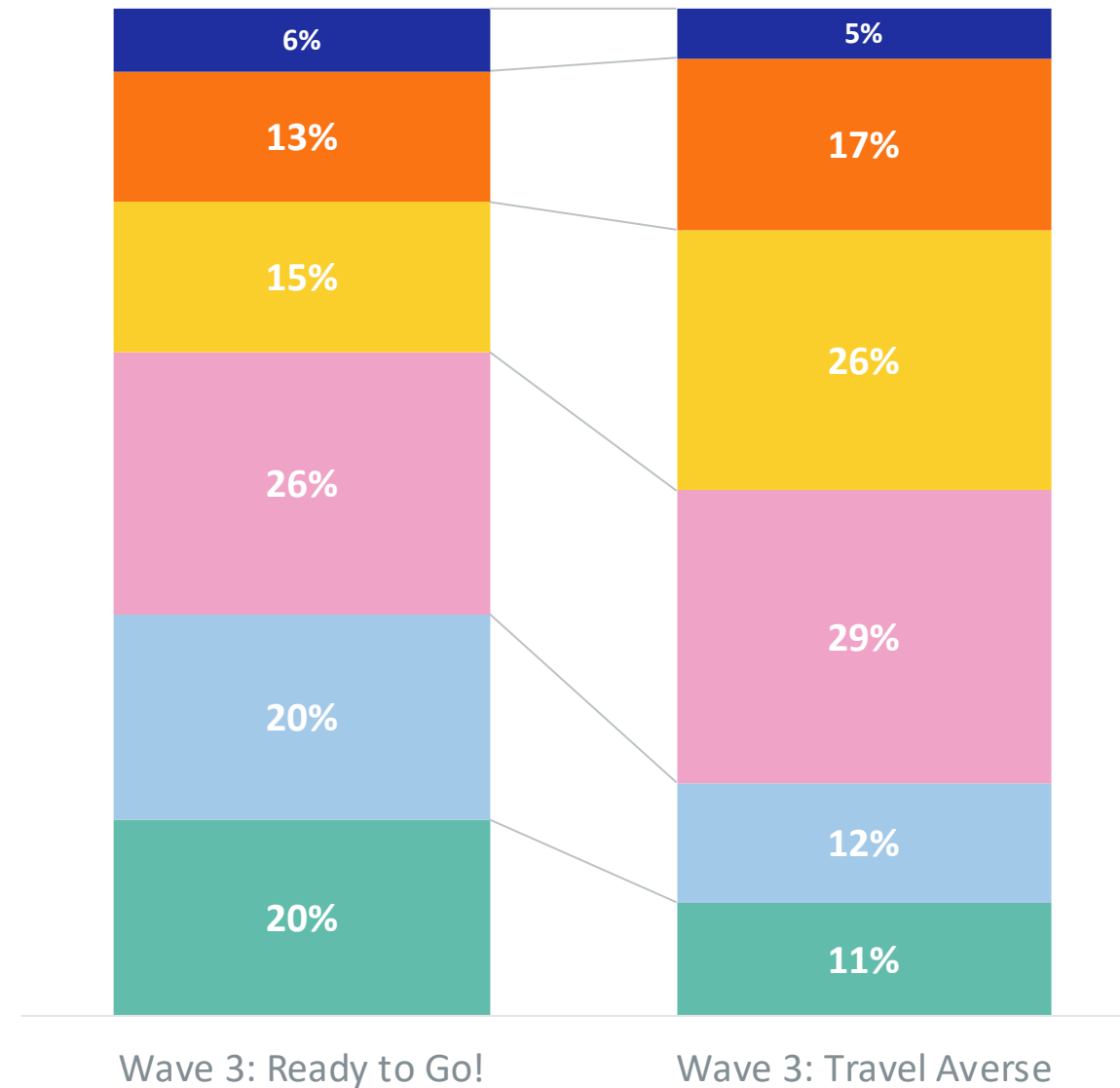
They are defined not by demographics, but – in many cases – by their relative lack of vulnerability to COVID19.



# Overall, “Ready to Go!” travelers are much less likely to be feeling worried or stressed in the current environment.

*“Which of the following best describes your overall mood these days?”*

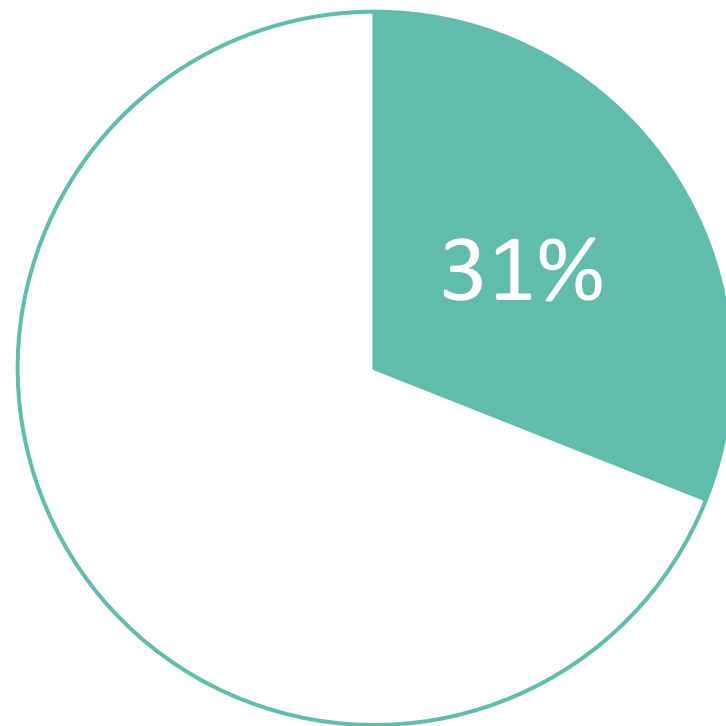
- Extremely stressed
- Very anxious
- Worried but not overly anxious
- Occasionally or mildly worried
- Frustrated but not worried
- Content/not worried



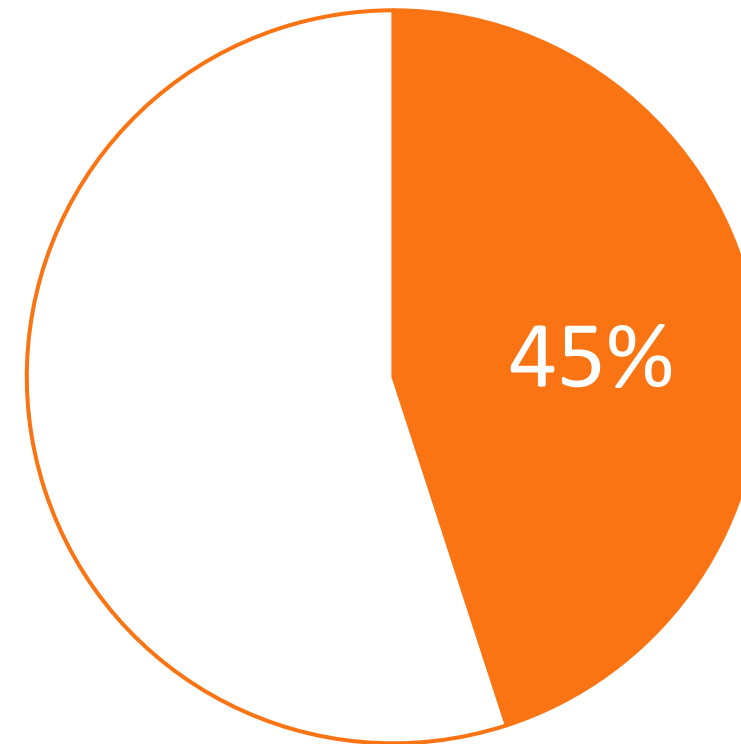
# The most significant difference between Ready to Go! and Travel Averse travelers is the degree to which they have someone in their household who is particularly vulnerable to COVID19.

*Q: Do you or anyone in your household have medical conditions that make you particularly concerned about the risks of coronavirus?*

*A: Yes*



Ready to Go!



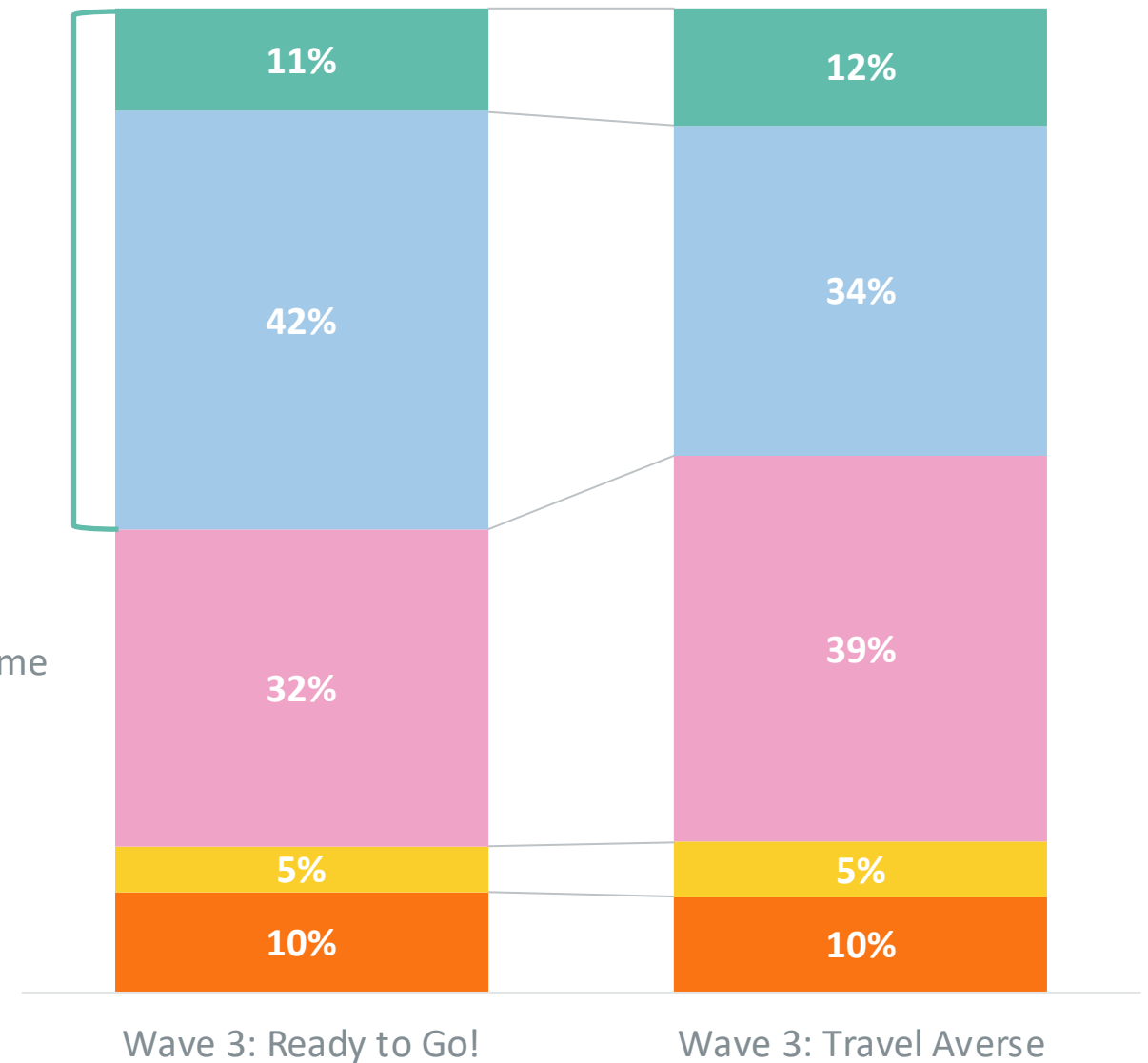
Travel Averse



# “Ready to Go!” travelers are somewhat more likely to consider travel an important part of their lives.

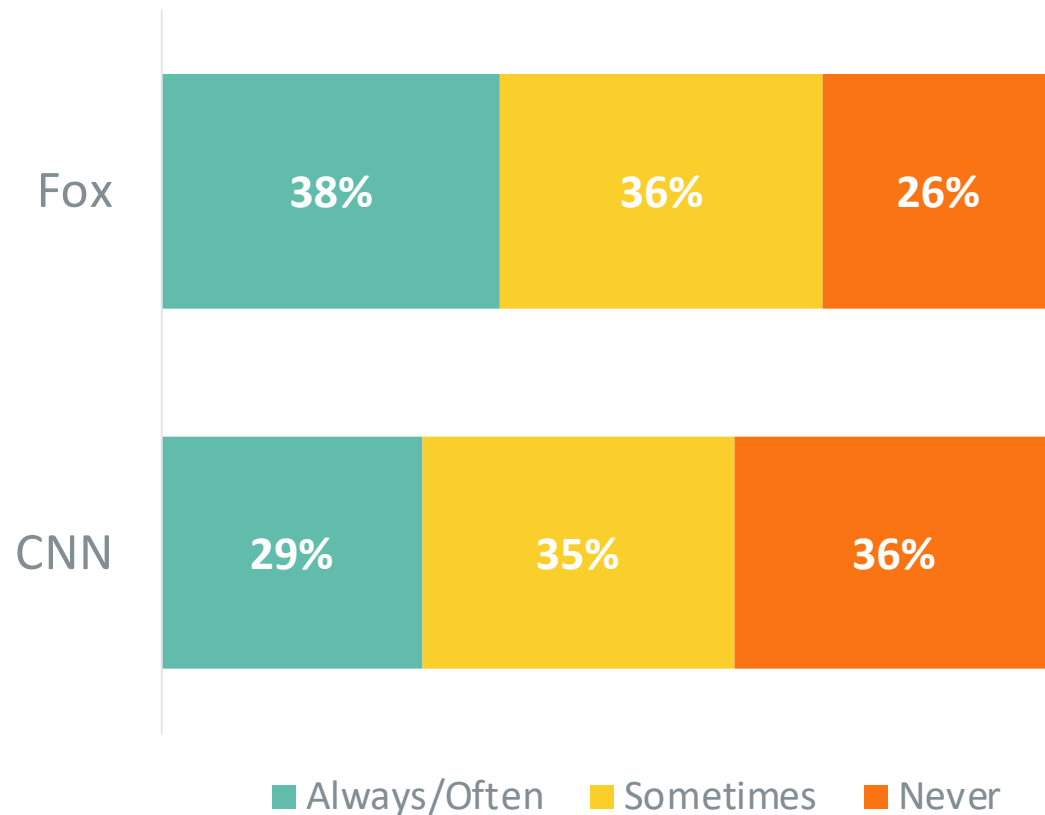
*“Under normal circumstances, how important to you are vacations or shorter pleasure trips?”*

- I live to travel!
- Vacations and other leisure trips are important to me
- I enjoy occasional vacations
- I go mostly because others want to go
- I would rather stay home

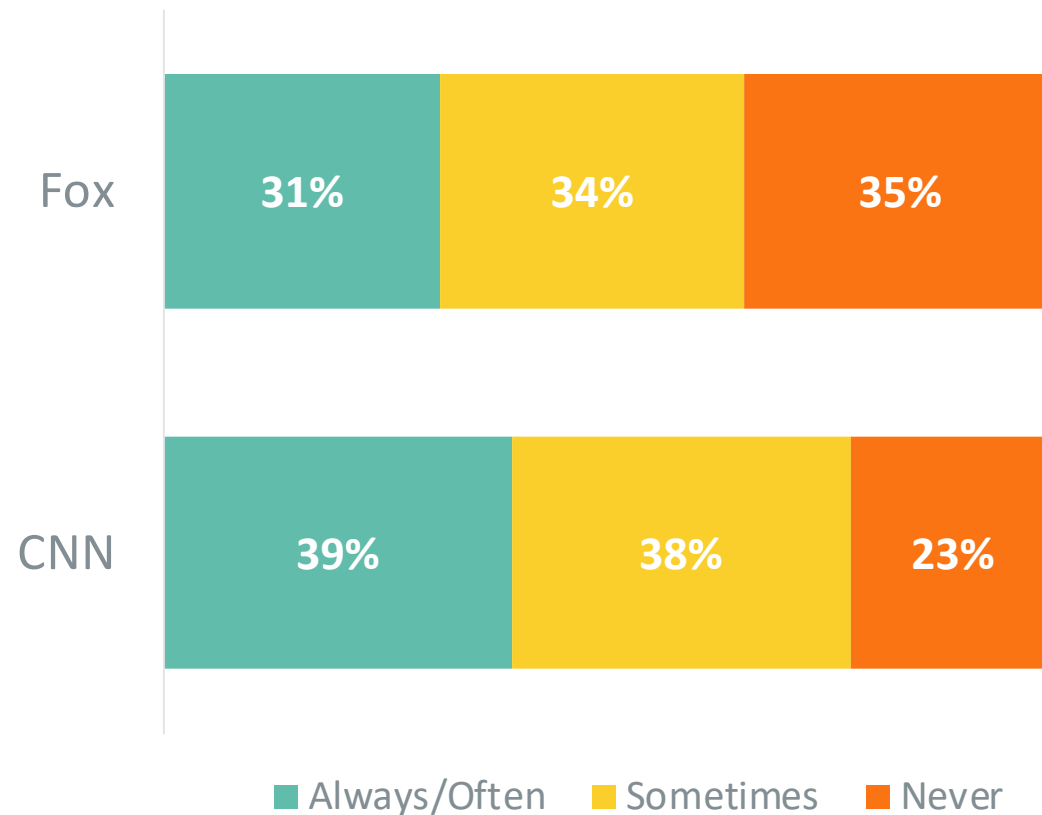


# They have some tendency to favor Fox over CNN, whereas the reverse is true for those who are Travel Averse.

*“Where do you get your news?”*



Ready to Go!



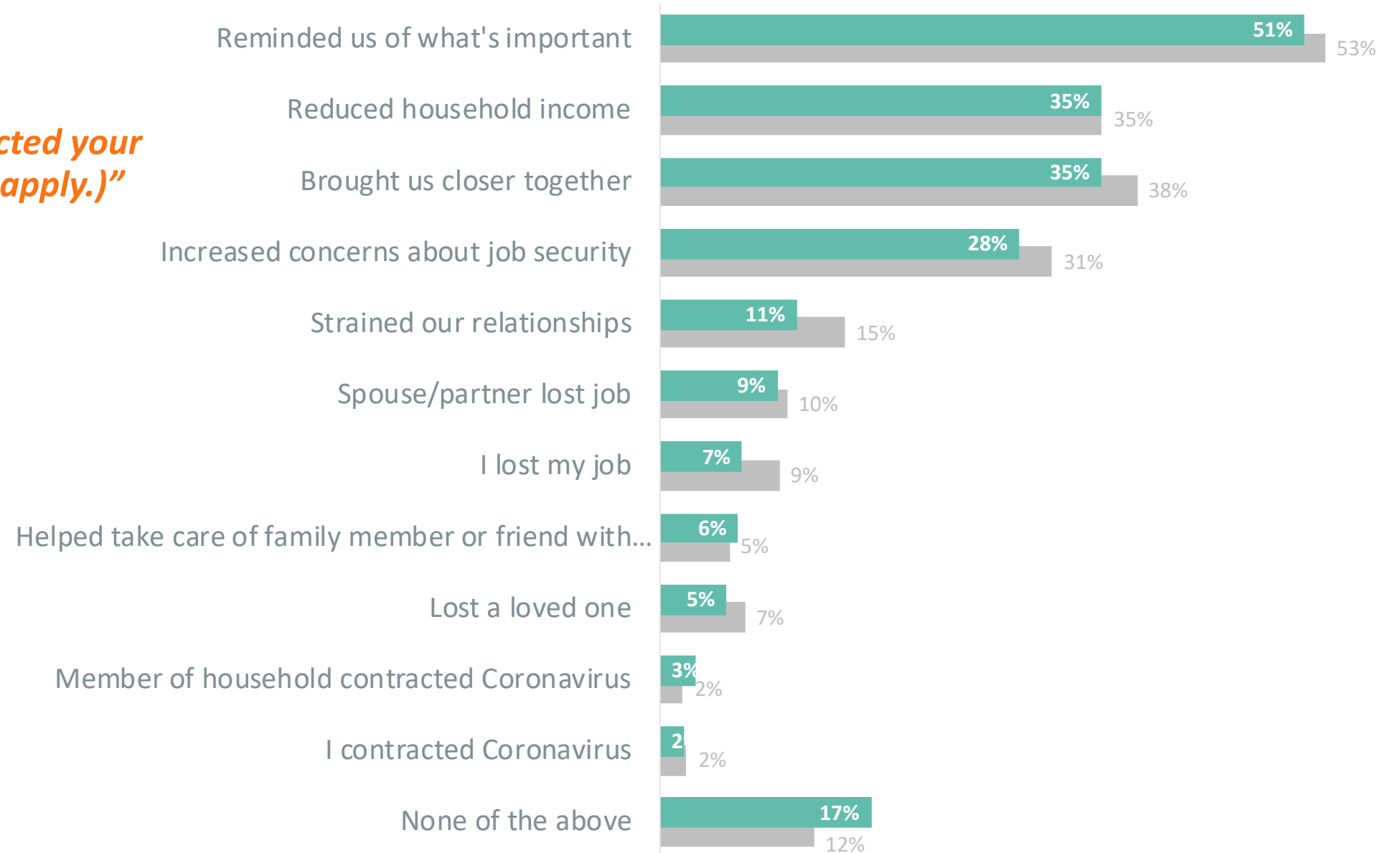
Travel Averse

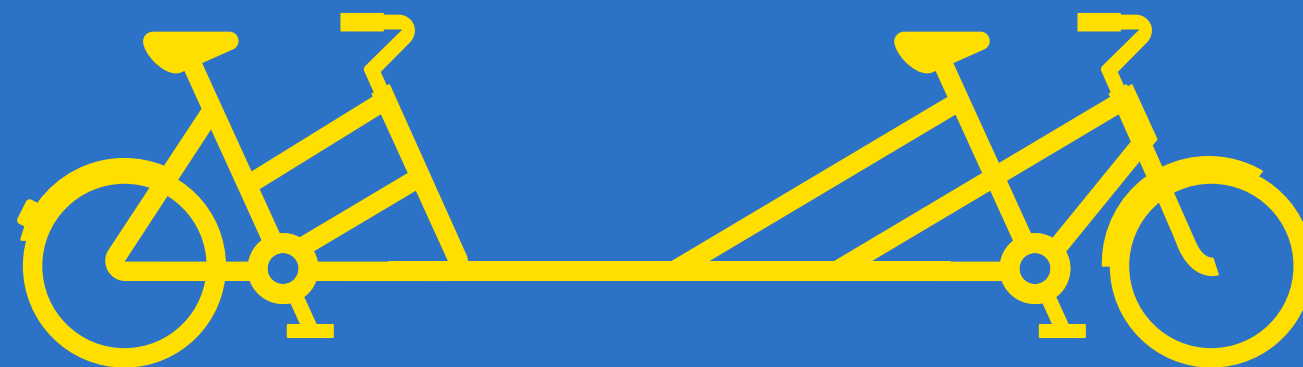


# Ready to Go! travelers are a bit less likely to have been personally impacted by the Coronavirus crisis.

*“How has Coronavirus impacted your household? (Select all that apply.)”*

■ Wave 3: Ready to Go!  
 ■ Wave 3: Travel Averse





**Never Not Together**

**PETER MAYER**