



PETERMAYER

COVID19 Impact on Travel Attitudes & Intentions Wave 2

May 13, 2020

Wave 2

- Fielded May 2 through 5
- 558 respondents
- 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



Executive Summary – Wave 2 versus Wave 1

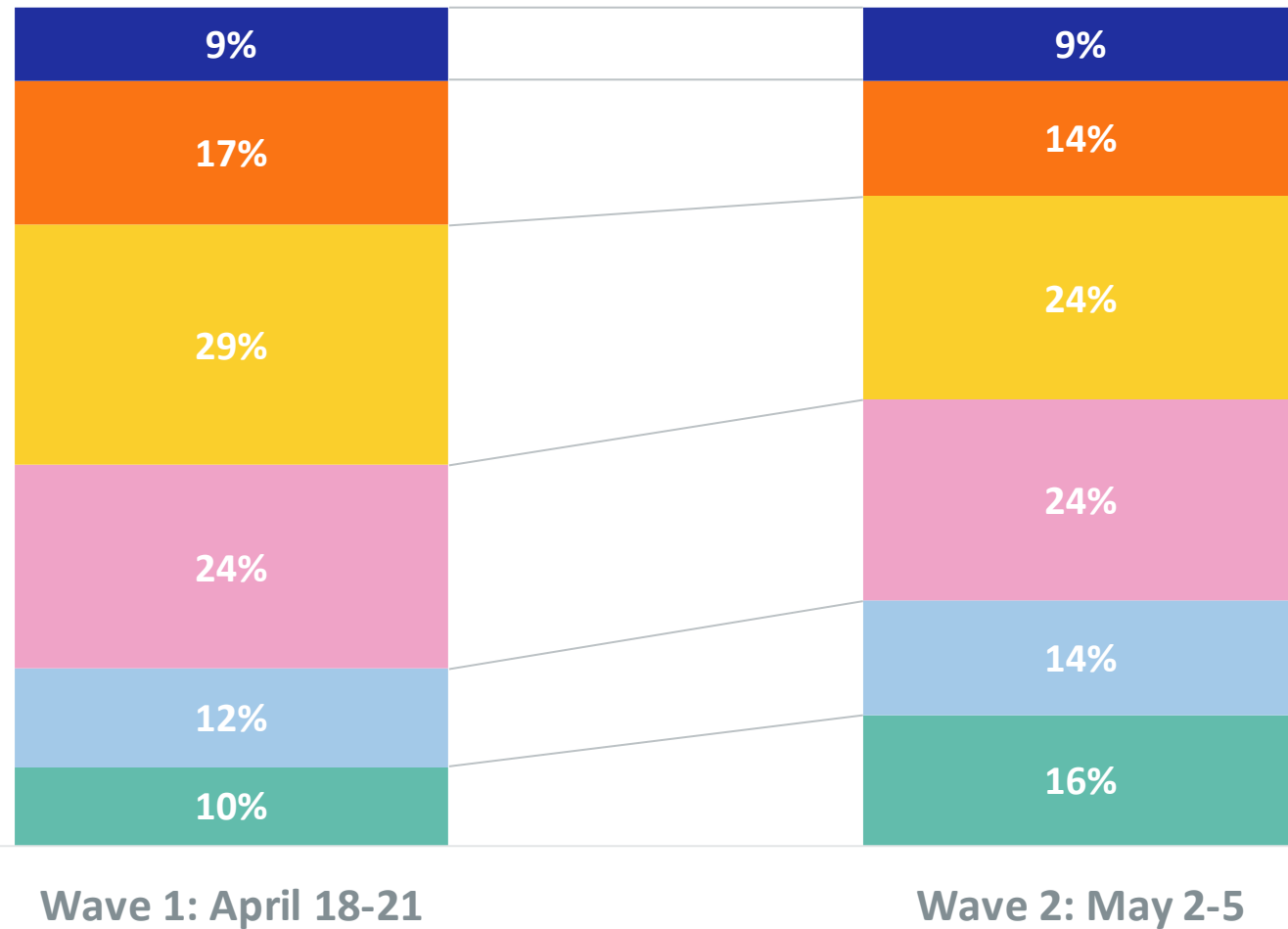
- Overall stress levels seem to be coming down for many travelers, but that is not yet translating into greater expectations regarding the number of trips they'll take in 2020
- Their concerns remain significant, though they may be diminishing slightly
- But they have not lost interest – their consumption of many sources of travel information and inspiration appears to be increasing
- **There is a sizable segment of travelers actively planning travel and expecting to vacation this summer**
- **Nearly half of Ready to Go! travelers** – those who intend to travel as soon as restrictions are lifted and/or it is widely approved to do so – **expect to vacation this summer**
- They do have concerns, but most seem to be decreasing
- And **Ready-to-Go travelers are increasing their planning, information gathering and travel inspiration activities**



Wave 2: Are Travelers Adjusting to a New Normal?



Overall stress levels seem to be coming down for many travelers.

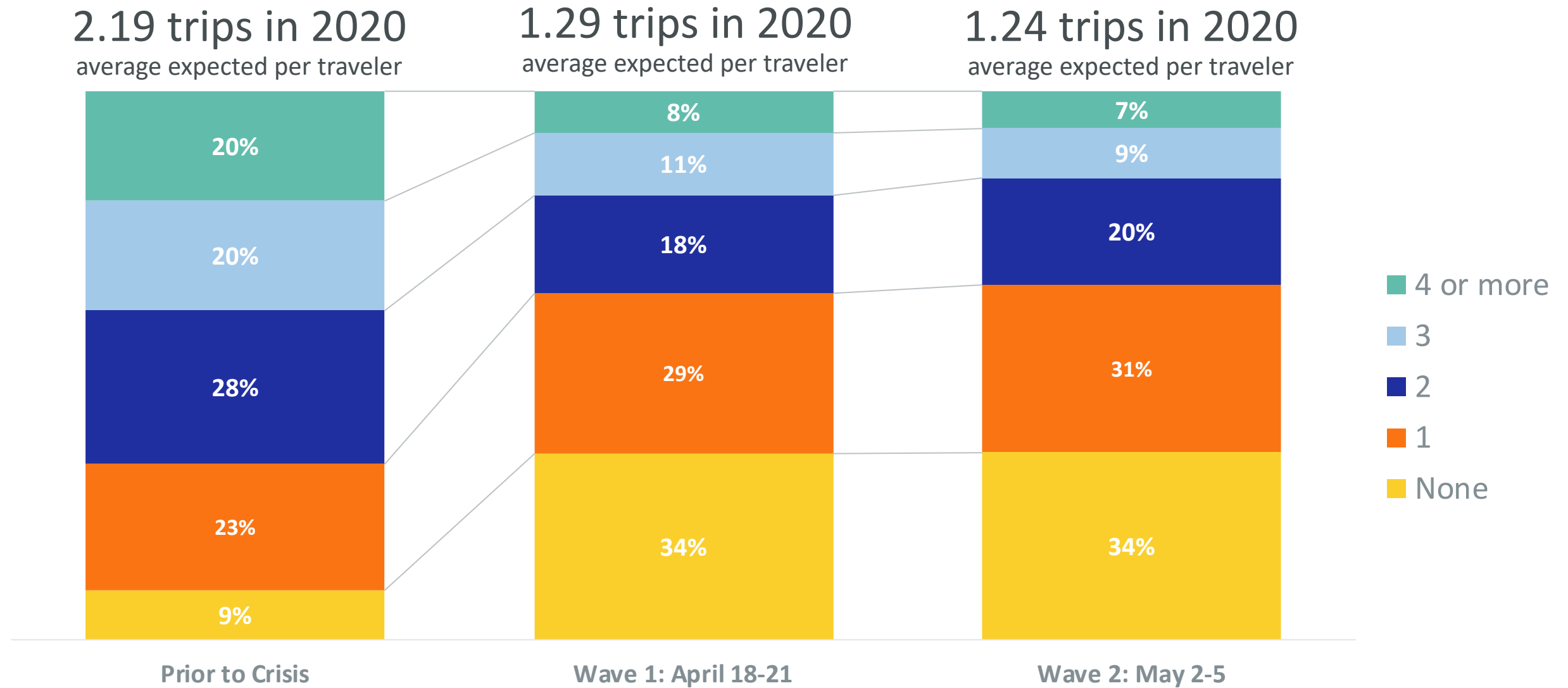


Which of the following best describes your overall mood these days?

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



That lower stress level, however, is not translating into greater expectations regarding number of trips they'll take in 2020.

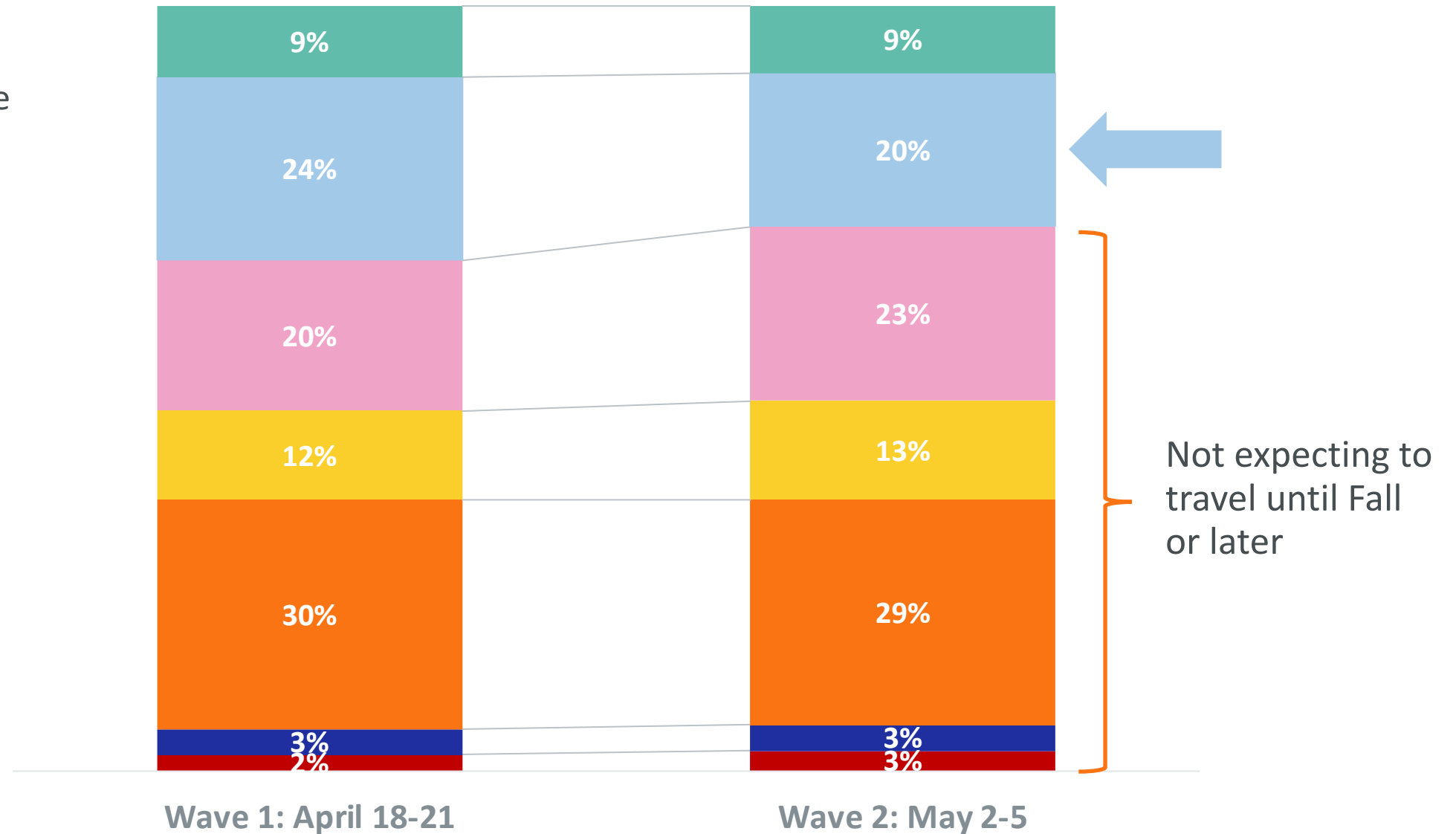


Prior to crisis, asked during Wave 1: "Before Coronavirus was a serious concern, how many vacations did you have planned for 2020?"
 Waves 1 and 2: "At this point, how many vacations or leisure trips do you expect you will take in 2020?"

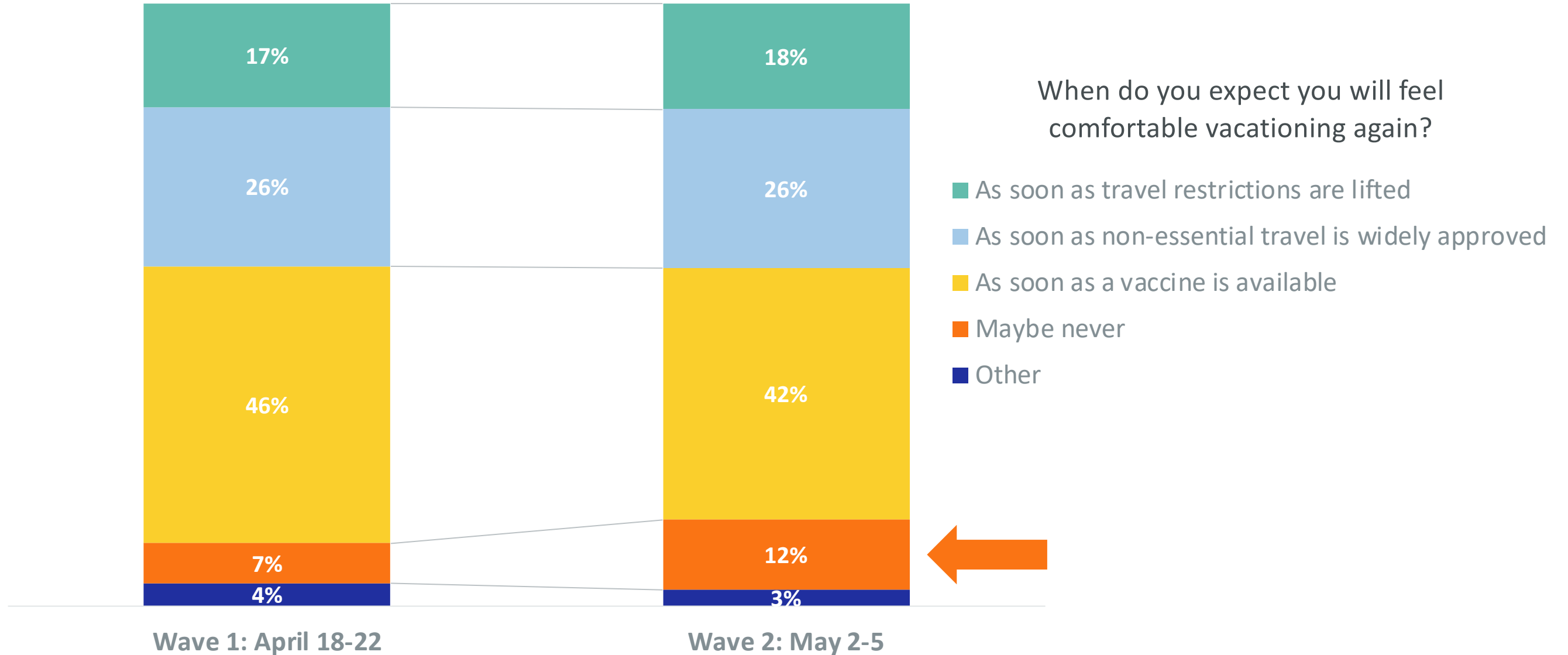
More travelers are losing hope for their 2020 summer vacations.

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

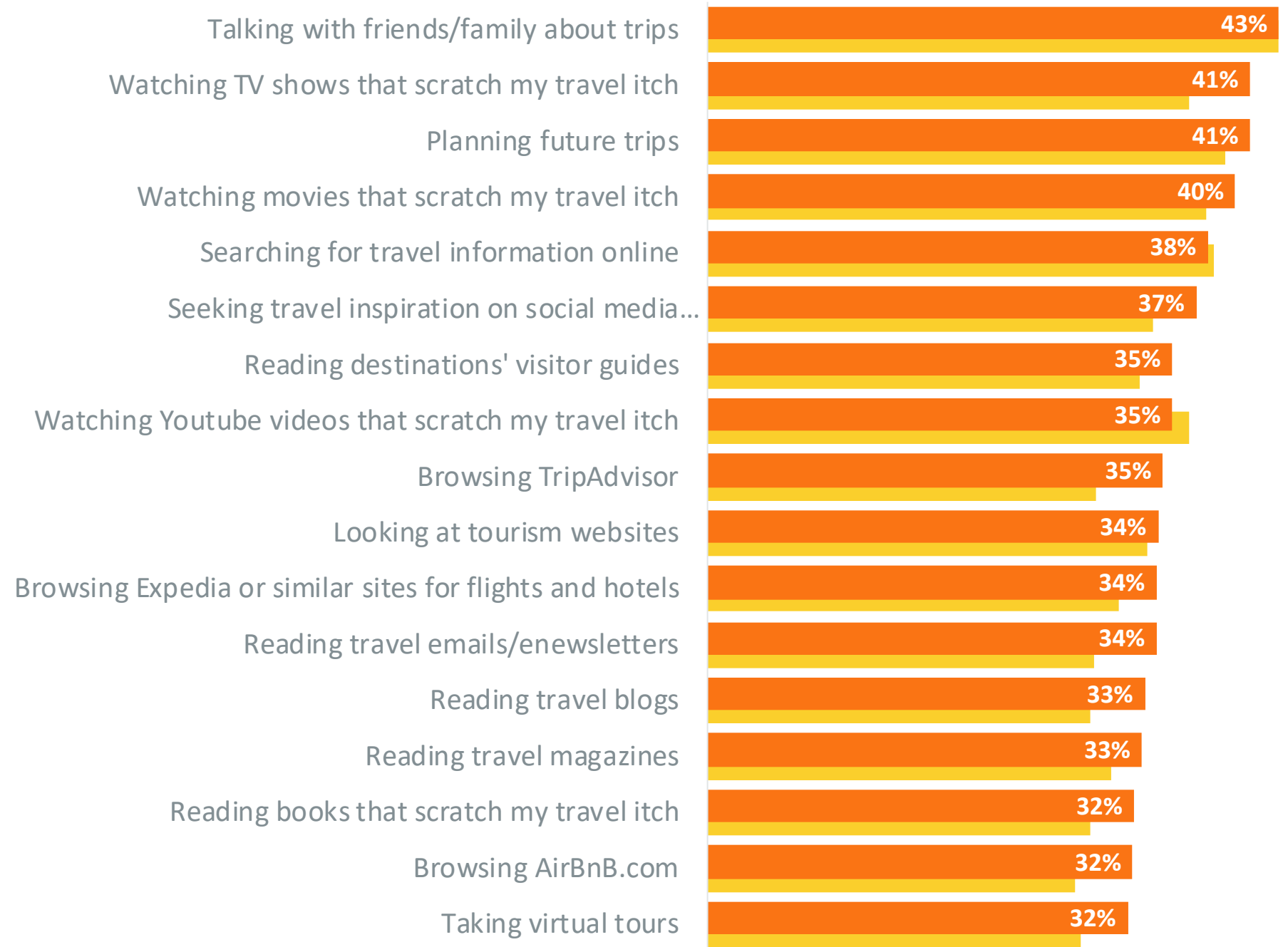


There is a small but growing segment of travelers who believe they may never feel comfortable vacationing again.



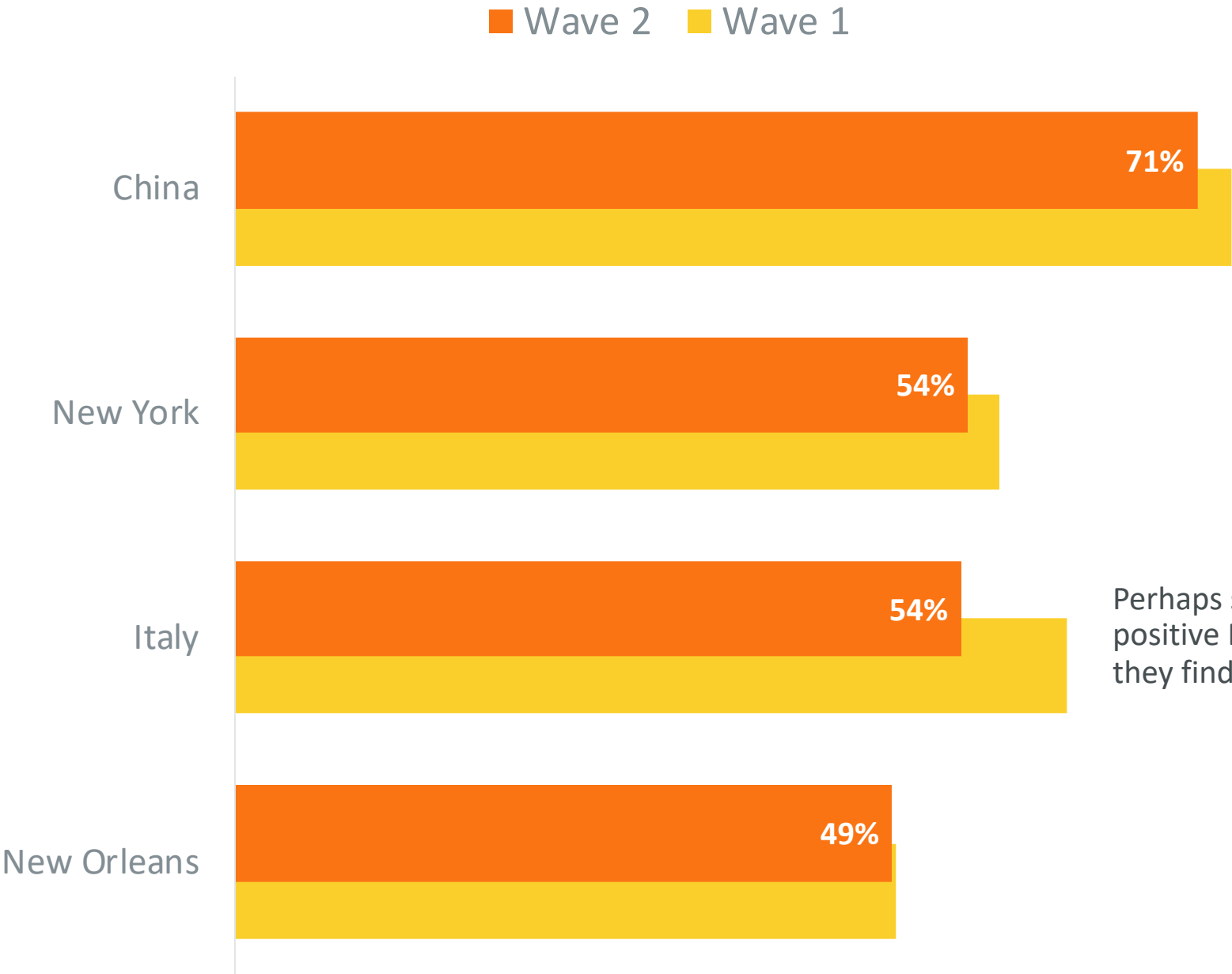
But travelers have not lost interest – their consumption of many sources of travel information and inspiration appears to be increasing.

■ Wave 2
■ Wave 1



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

There's hope that even the hardest-hit tourism destinations can recover.

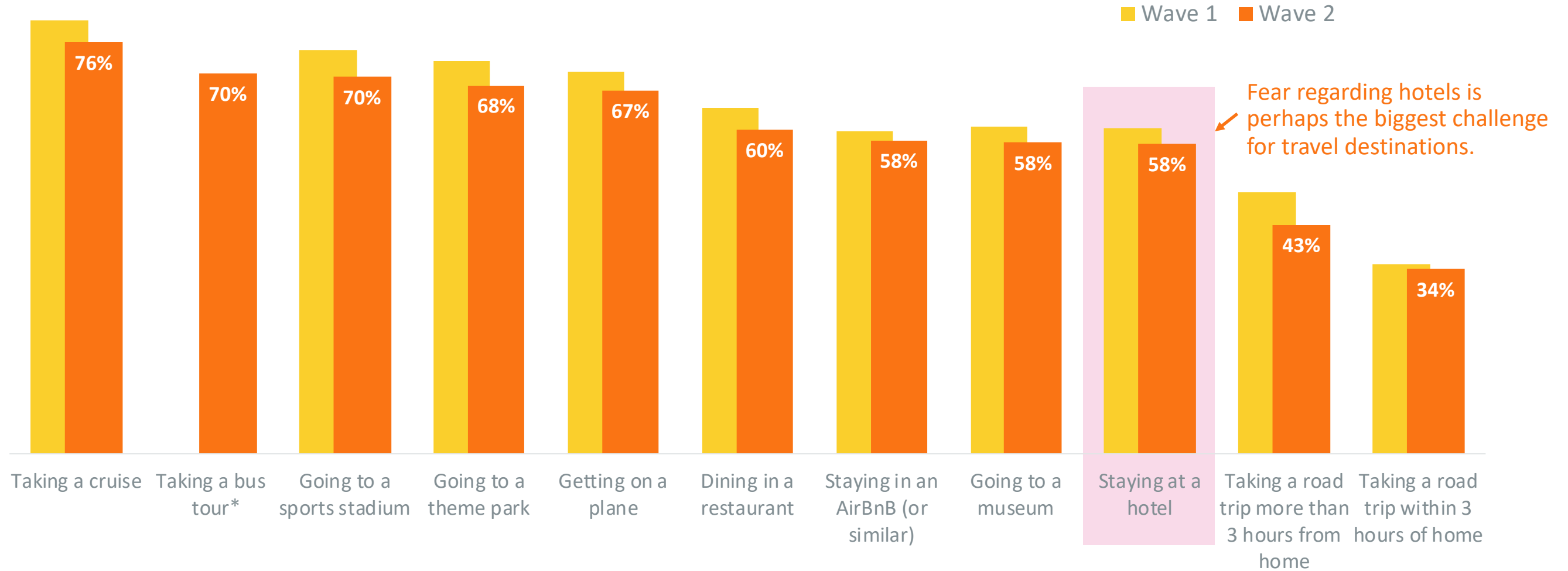


Perhaps starting to recover with promising COVID19 data and some positive PR, Italy even has a growing minority of travelers reporting they find the destination more appealing now than they did in 2019.

Q: "Compared to how you felt in 2019, how appealing are the following destinations?"
A: "Much less appealing" or "A little less appealing"



Travelers' concerns are still significant, but may be diminishing slightly.

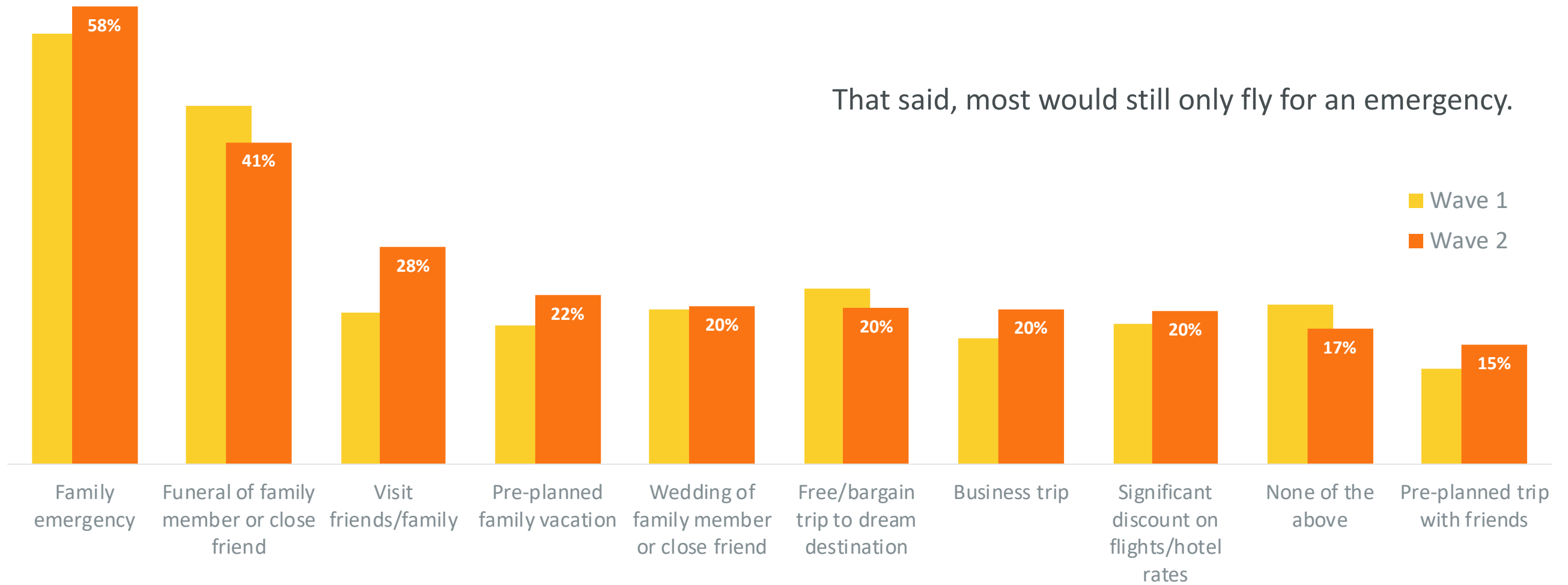


Q: If it was possible to do it right now, how concerned would you be about _____?
 A: 4 or 5 on a scale of 1 to 5, 5 being most concerned.

*Wave 1 did not include the question about bus tours.

Travelers are starting to find it easier to envision getting on a plane, especially to be with family and friends.

That said, most would still only fly for an emergency.



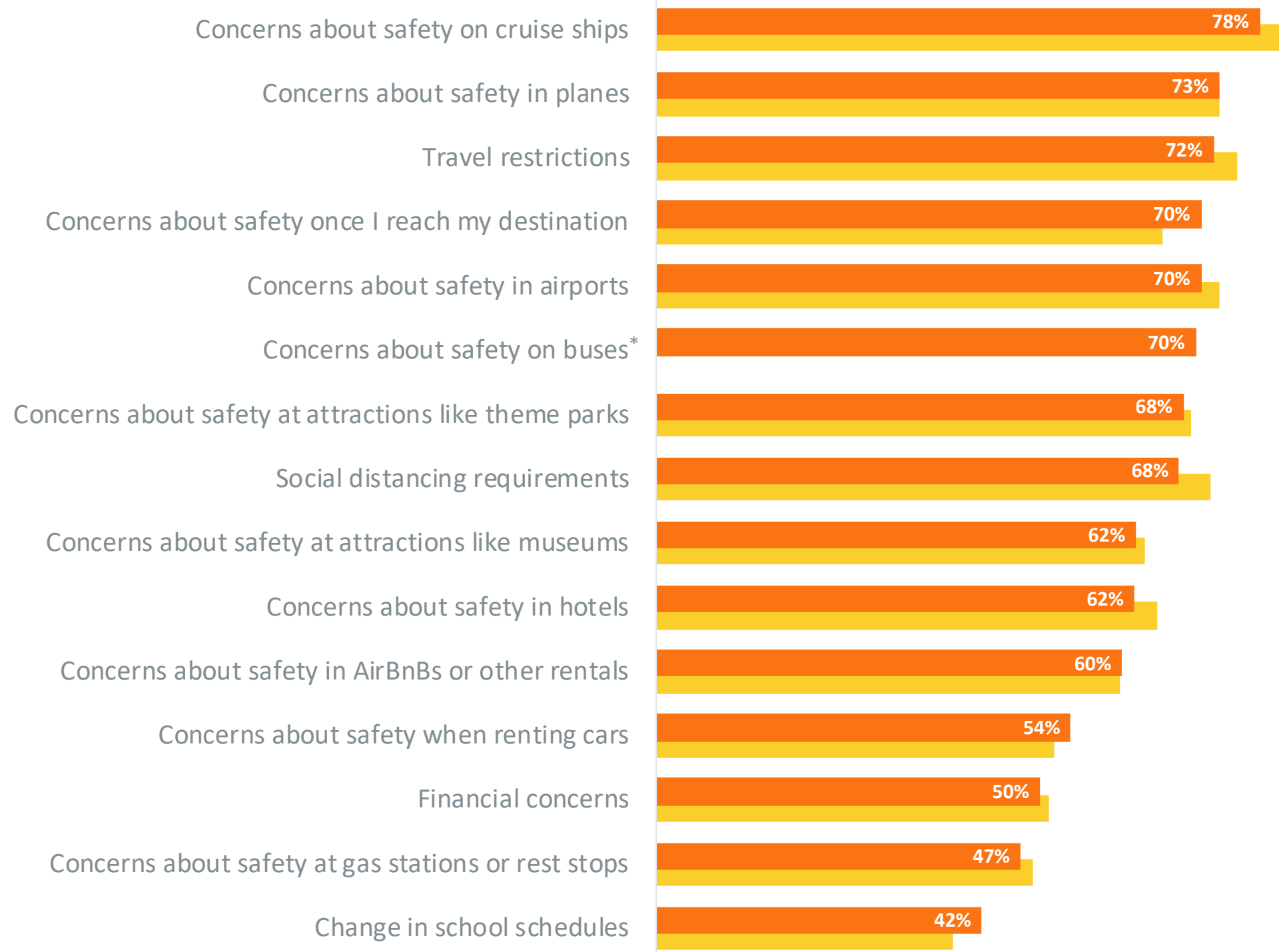
What would make you get on a plane right now?

But they are still limited by their concerns.

Q: To what degree are the following likely to limit your travel this year?

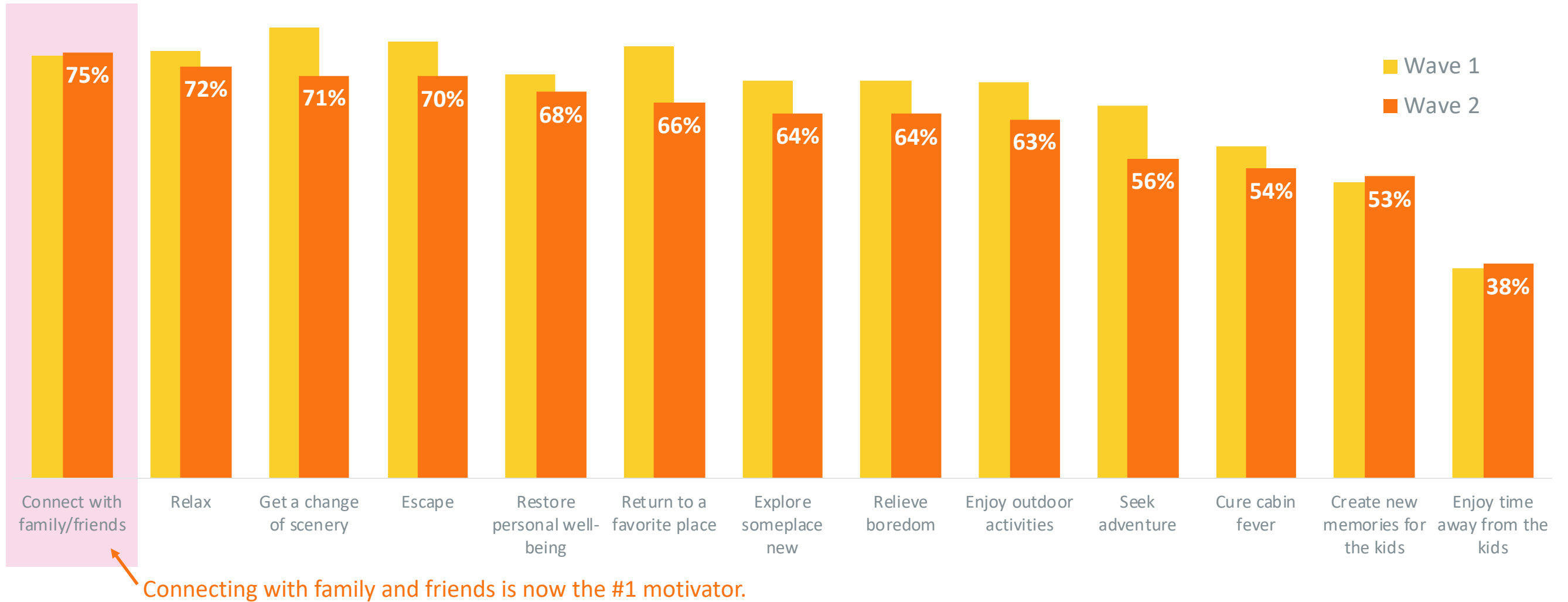
A: 4 or 5 on a scale of 1 to 5, with 5 being most likely.

■ Wave 2
■ Wave 1



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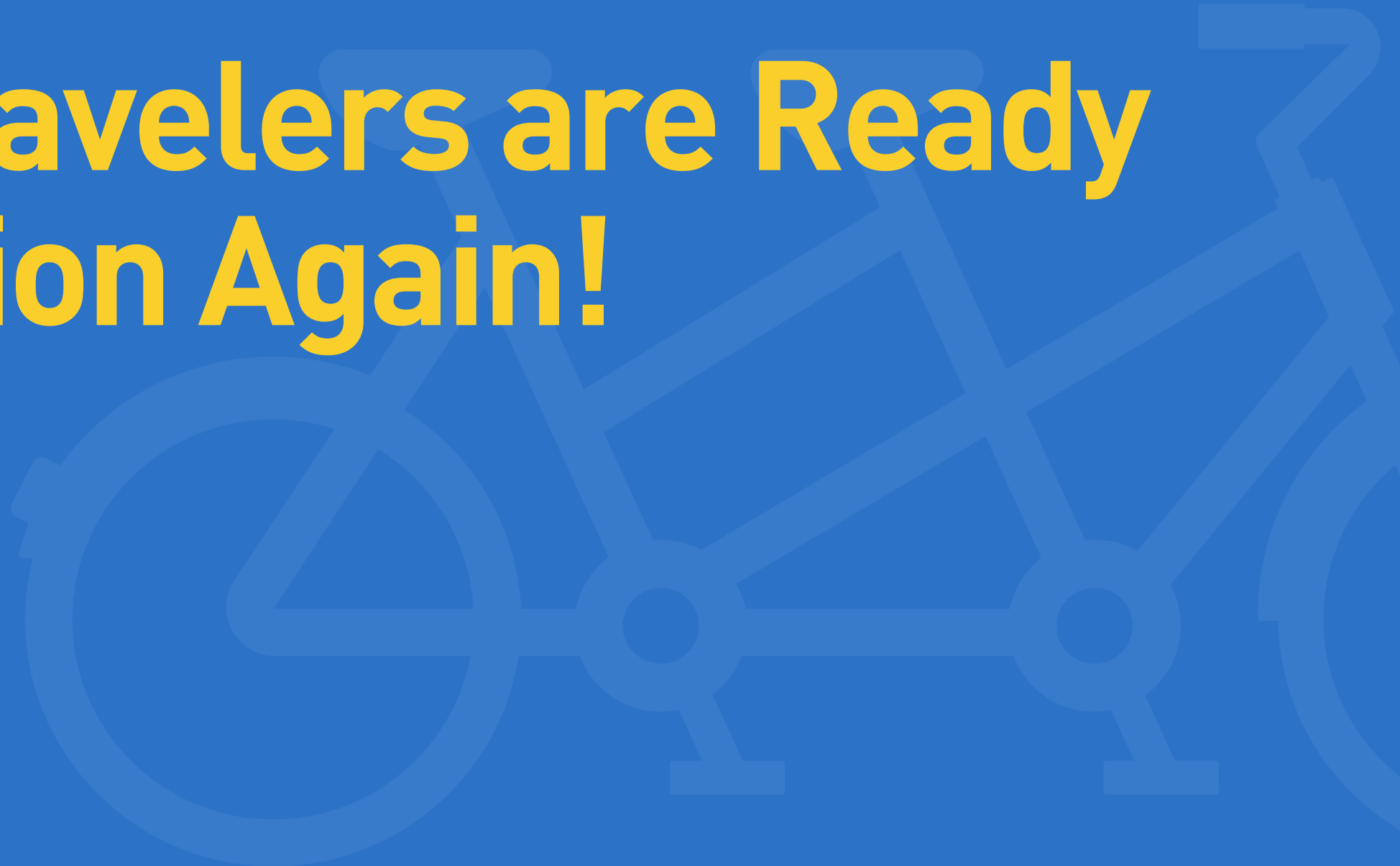
And most of their travel motivations seem to be diminishing somewhat.



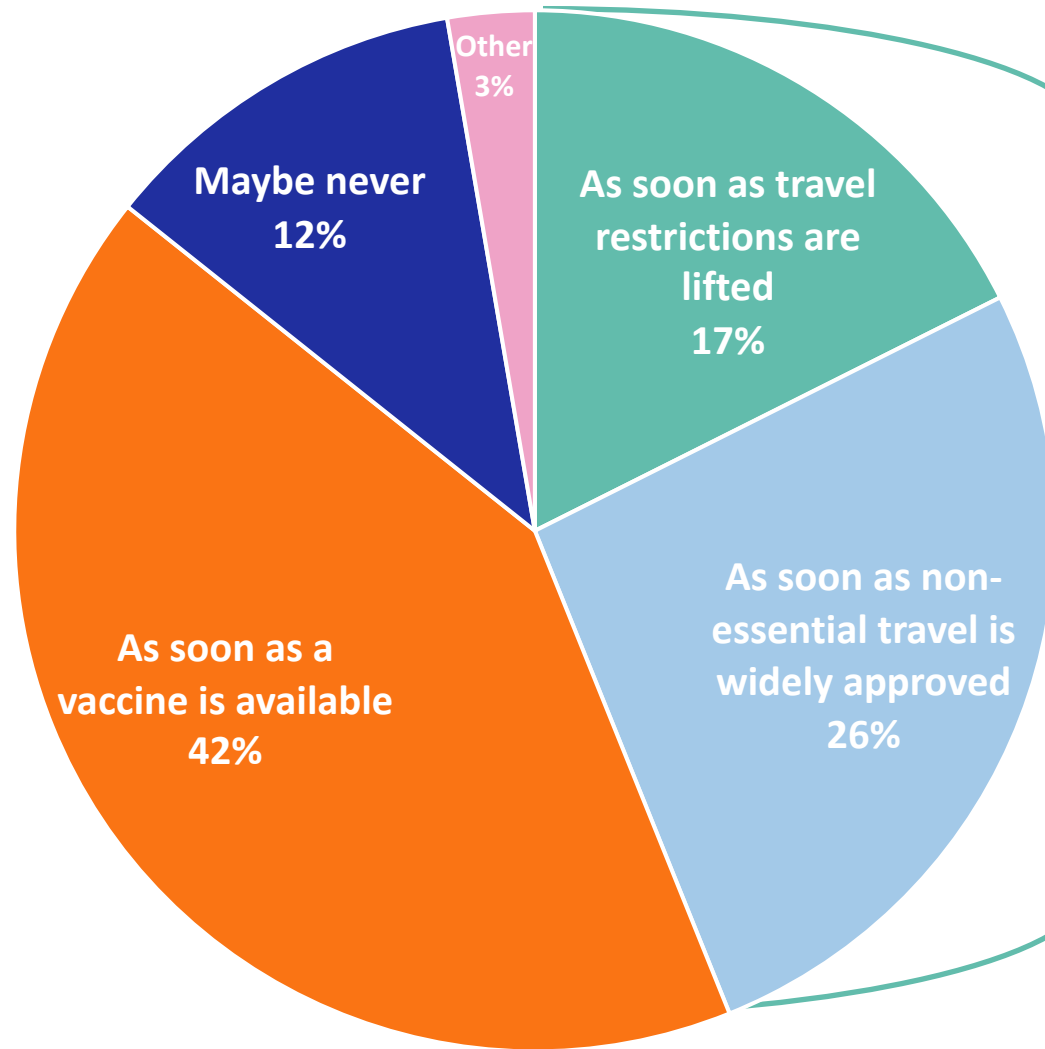
Q: What are the reasons you will be eager to travel once restrictions lift?
A: 4 or 5 on a scale of 1 to 5, 5 being a very strong motivator.

It may be that travelers are growing resigned to a long wait to get back to their old travel habits.

**Wave 2:
Many Travelers are Ready
to Vacation Again!**



Similar to Wave 1, 44% of Wave 2 travelers surveyed said they will feel comfortable vacationing as soon as non-essential travel is widely approved, if not before.

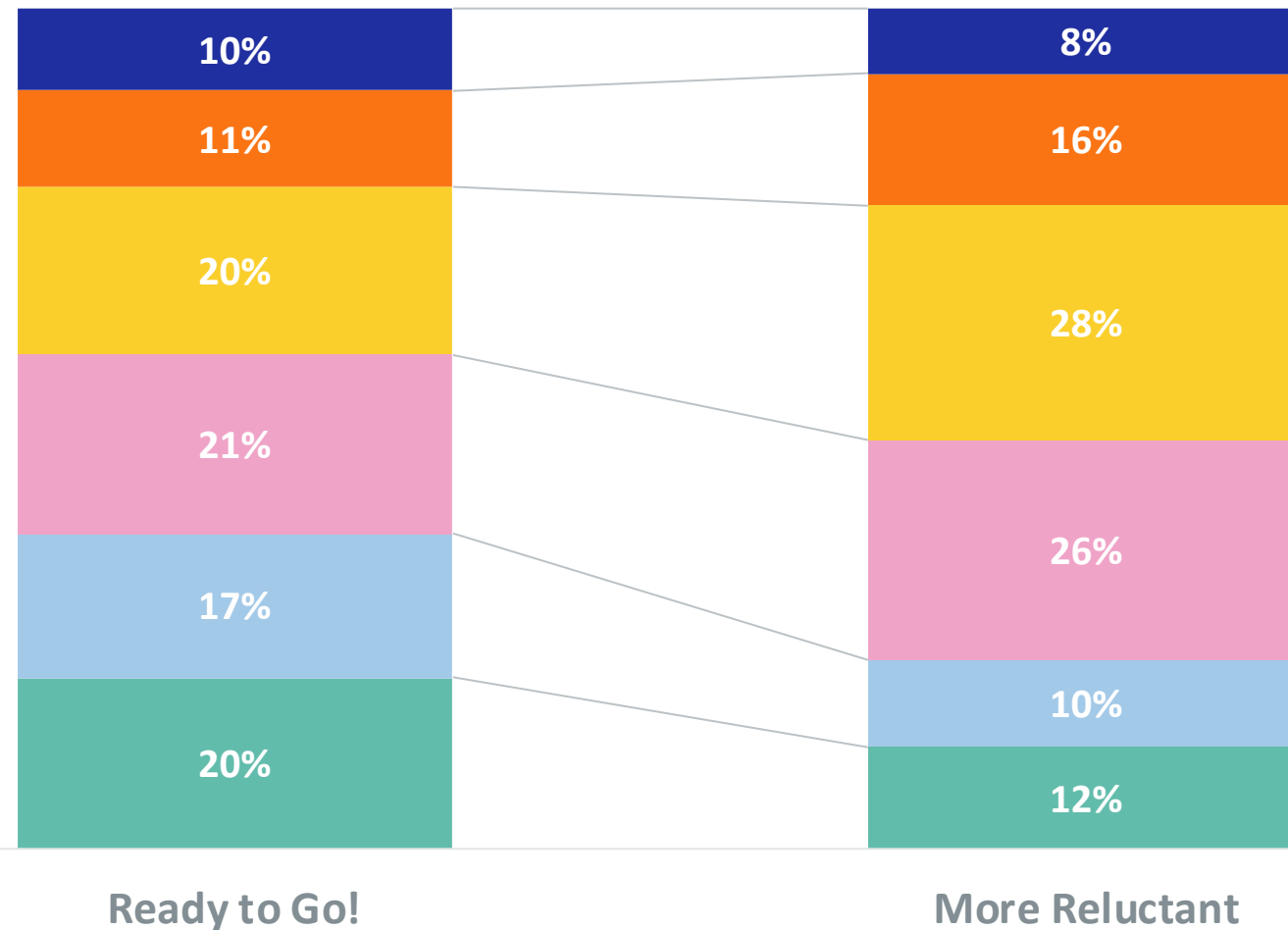


“Ready to Go!”
Travelers Most Likely
to Resume Travel Quickly



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

Travelers who report they will resume travel once it's widely approved remain – overall – less stressed than more reluctant travelers.

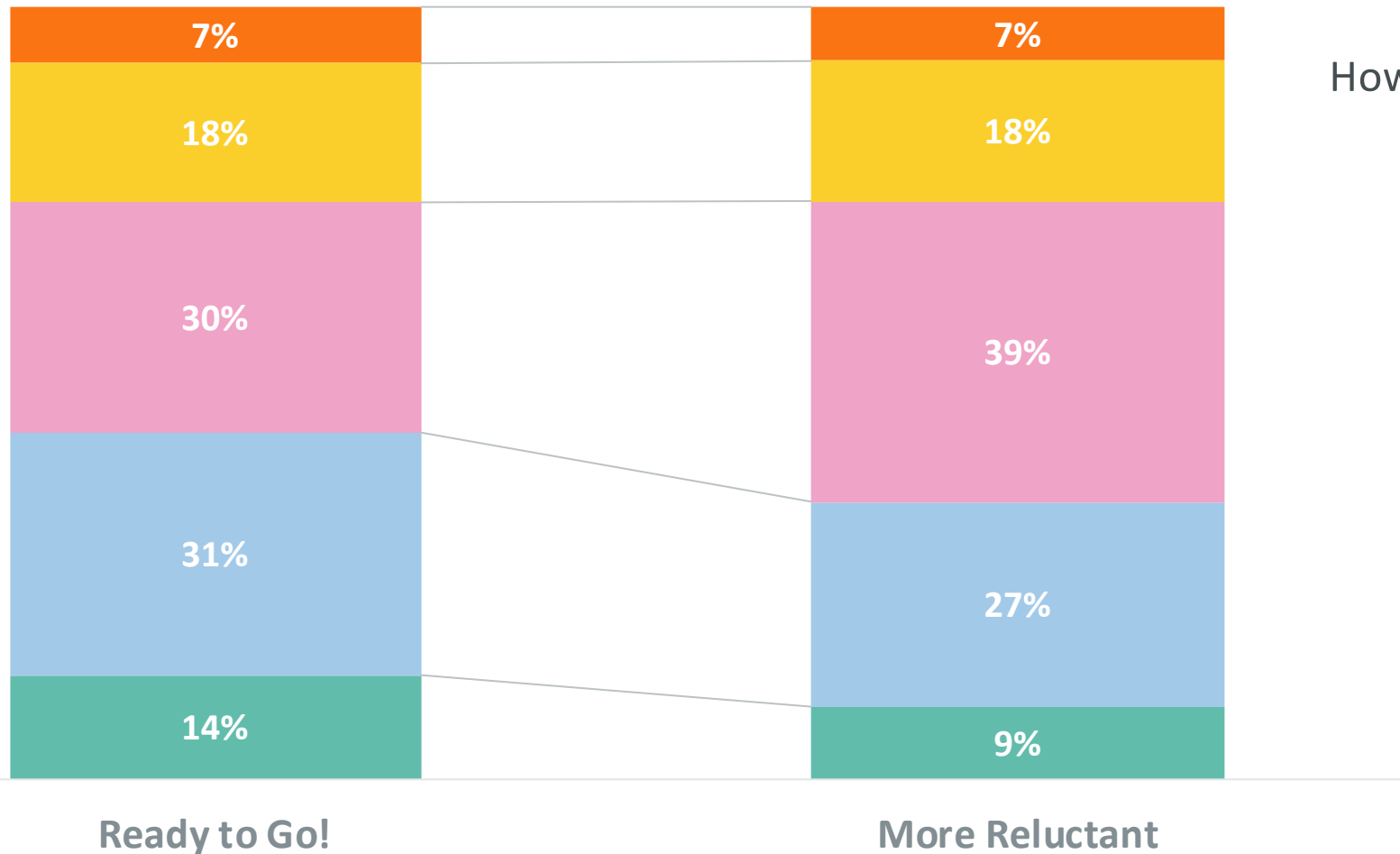


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Ready to Go! travelers tend to be less stressed under normal circumstances as well.

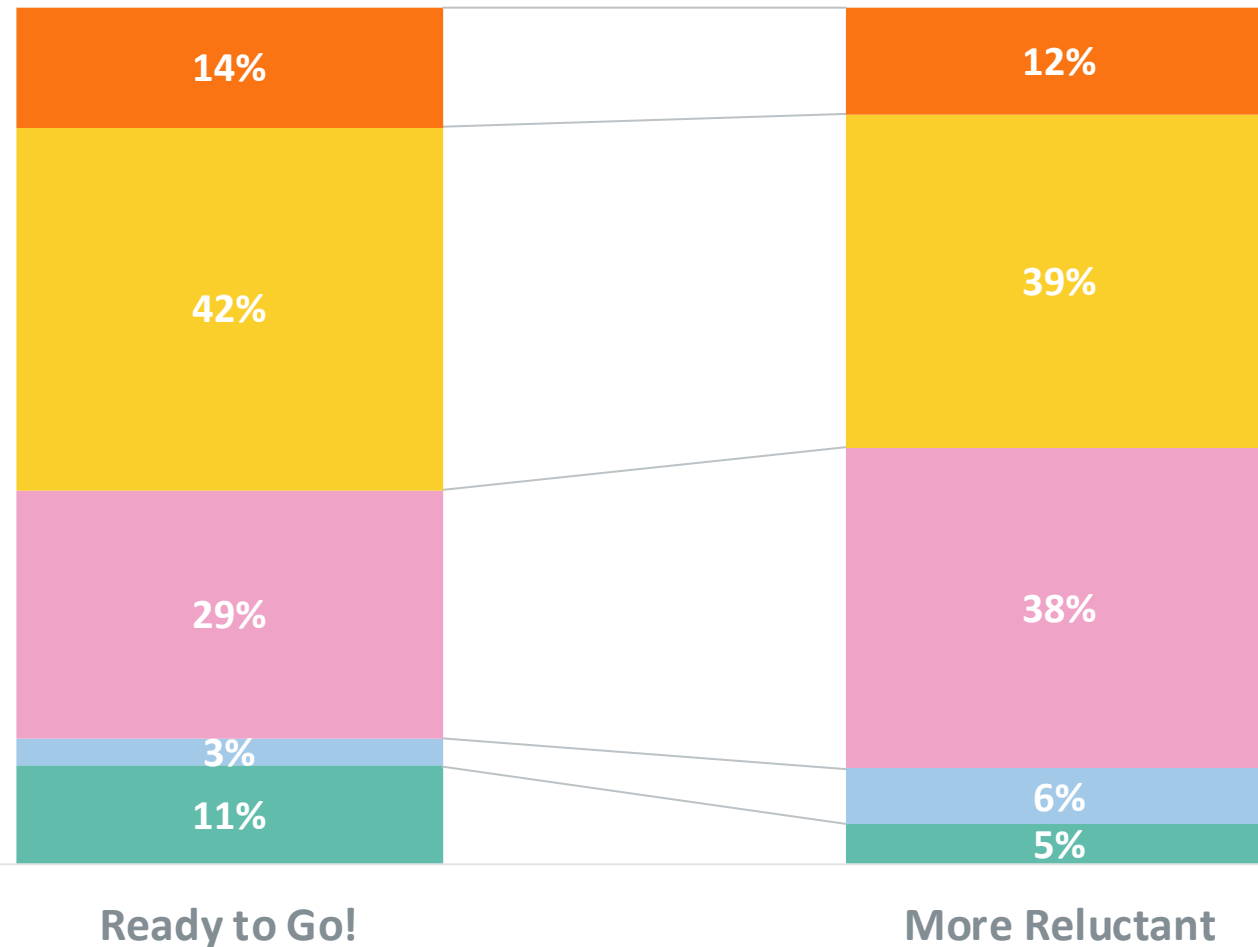


How anxious do you tend to be under normal circumstances?

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



They may be slightly more likely to be avid travelers.

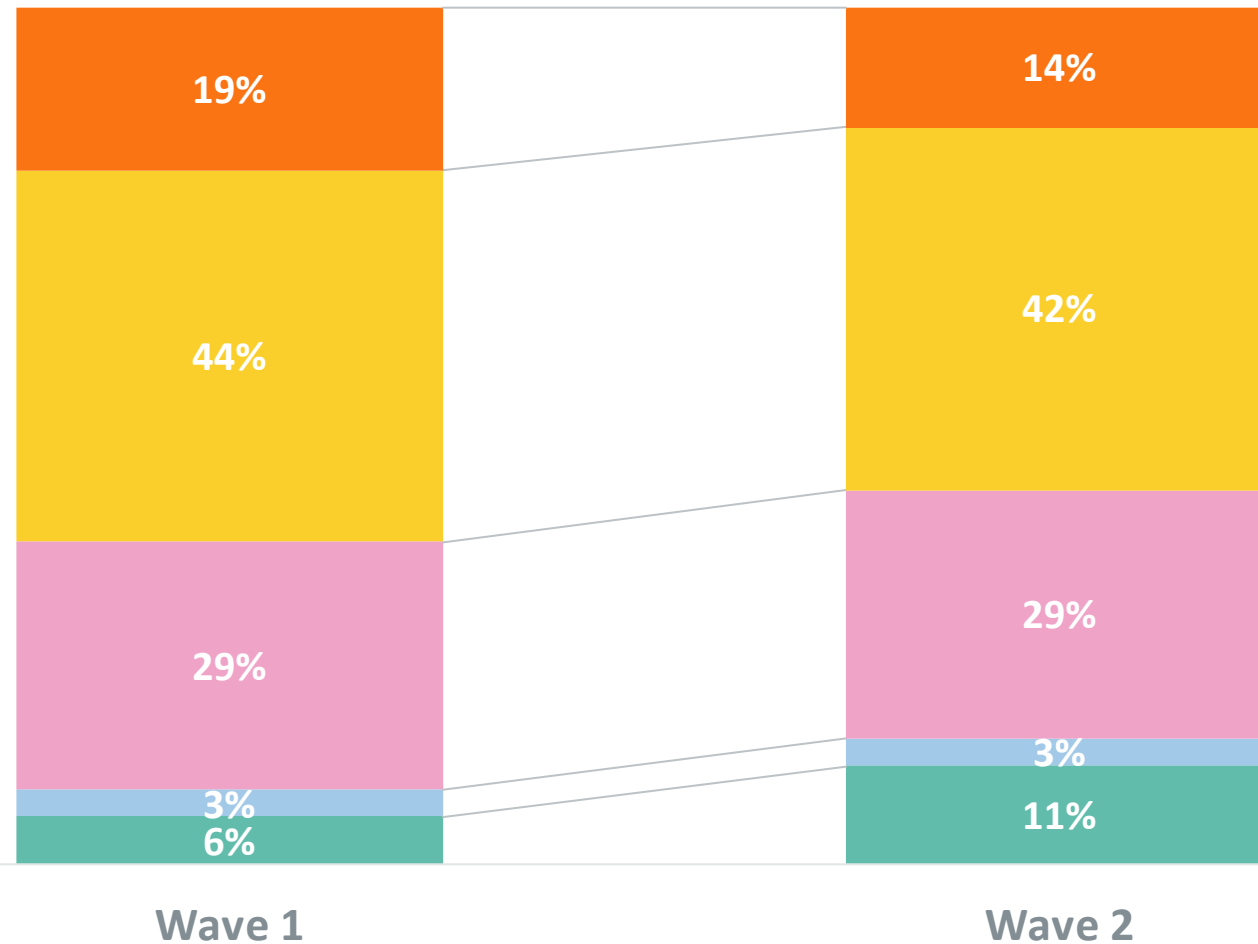


Under normal circumstances, how important to you are vacations or shorter pleasure trips?

- 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



It is possible that recent experiences have shifted the way Ready to Go! travelers think about the role of travel in their lives.

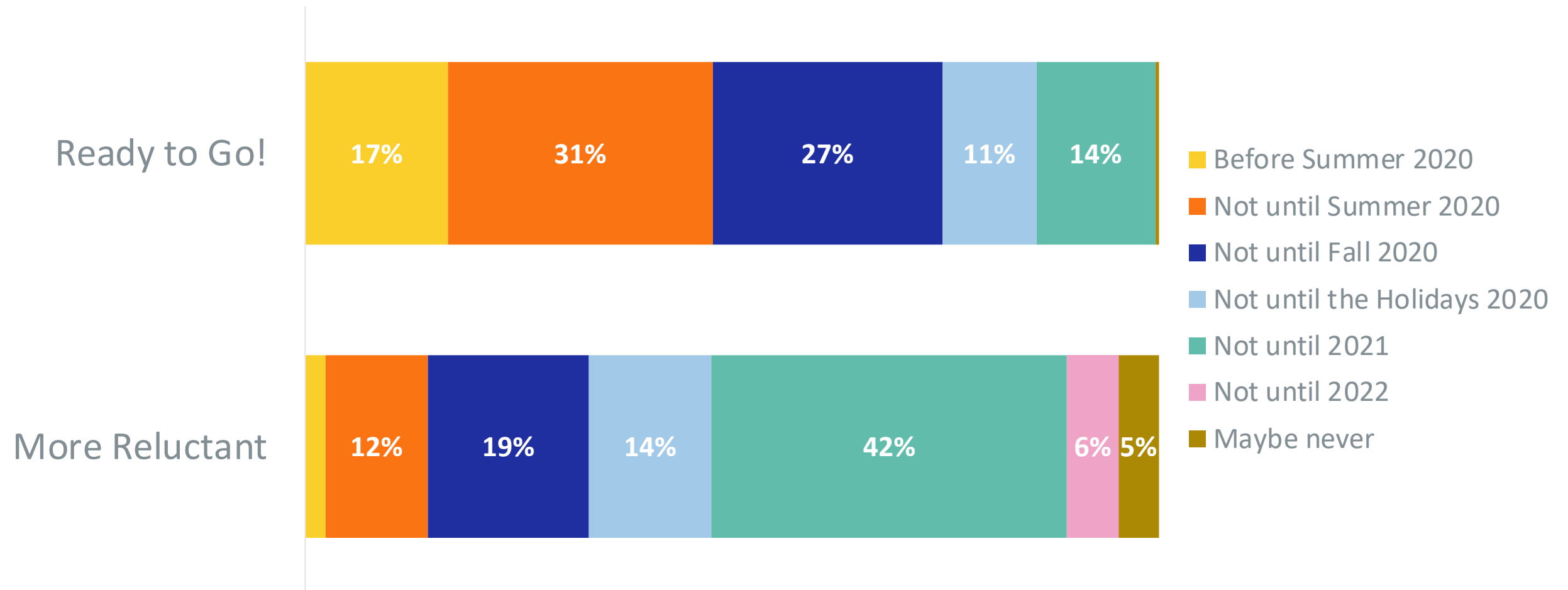


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Still, nearly half of Ready to Go! travelers expect to vacation this summer.



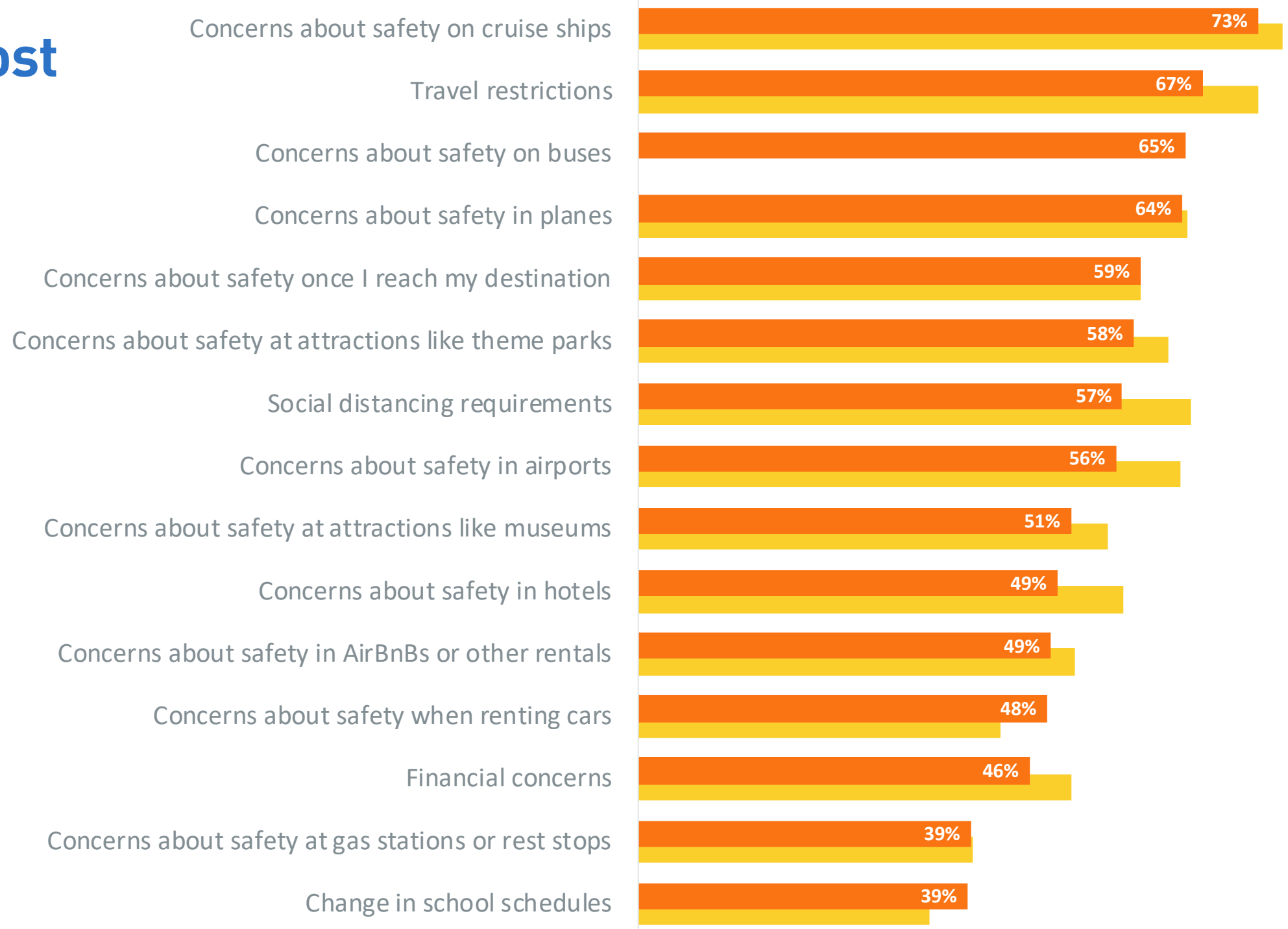
How long do you think it will be before you vacation again?

They do have concerns, but most seem to be decreasing.

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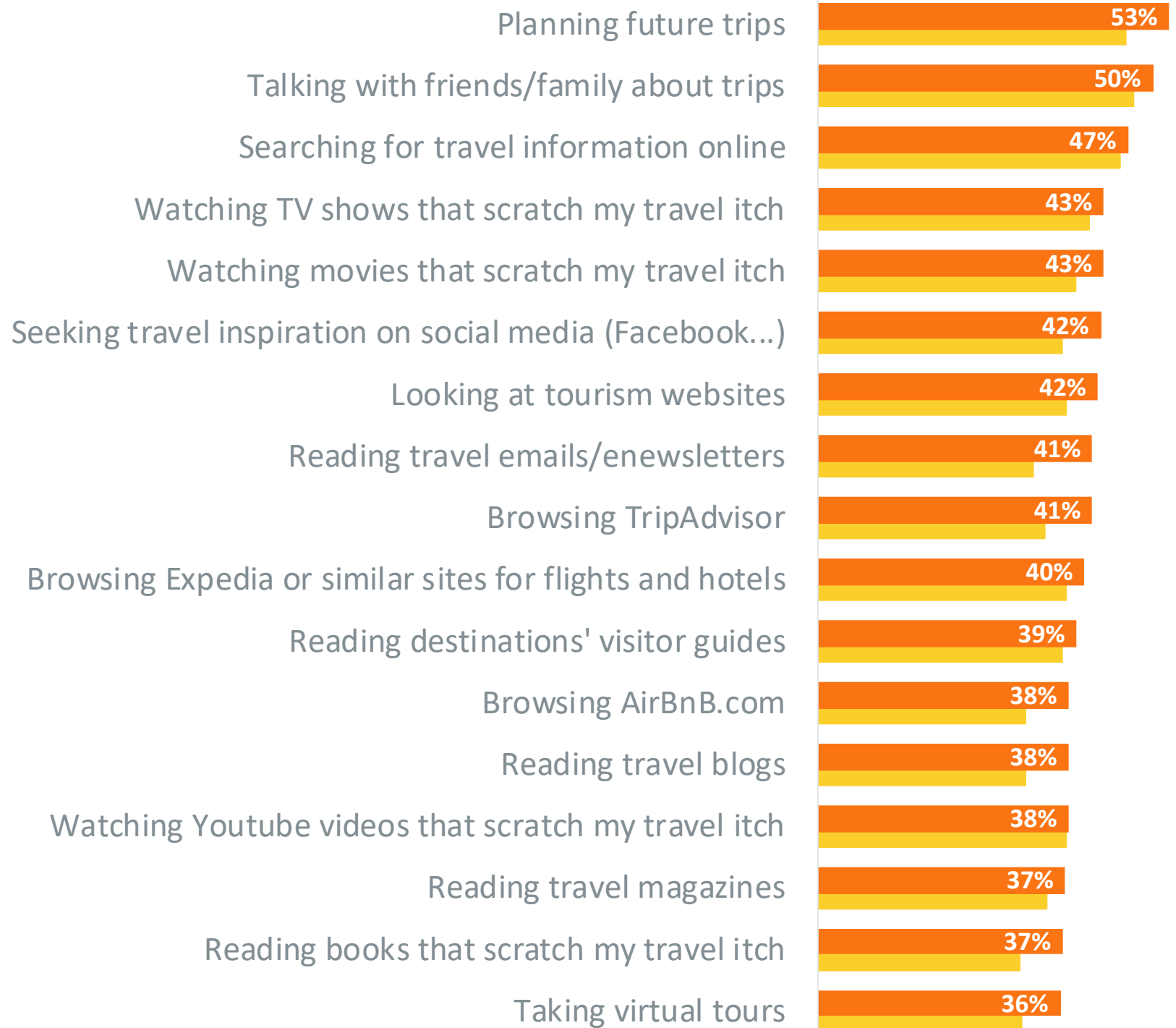
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■ Wave 2
■ Wave 1



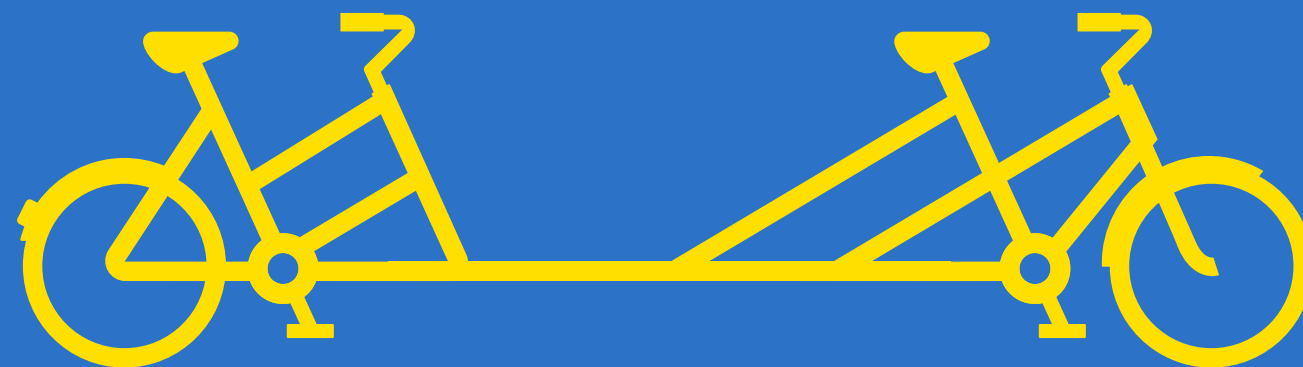
And they are increasing their planning, information gathering and travel inspiration activities.

■ Wave 2
■ Wave 1



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

There is a sizable segment of travelers actively planning travel and expecting to vacation this summer.



Never Not Together

PETER MAYER