MMGY Travel Intelligence

DECEMBER 2020 – Wave XI

# TRAVEL INTENTIONS PULSE SURVEY (TIPS)

*Impact of COVID-19*

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# OVERVIEW

MMGY Travel Intelligence conducts this ongoing tracking survey to monitor the impact of COVID-19 on the travel intentions of U.S. adults. Each release presents the most current data on travelers' prevailing attitudes and expected changes in their travel behavior as a result of COVID-19.

# *Better insights.*
# SMARTER STRATEGY.

MMGY Travel Intelligence specializes in syndicated and custom market research exclusively for the travel and tourism industry. We boast the industry's most expansive and richest historical database and strive to provide the highest-quality travel and traveler research.

Our mission is to provide clients with valuable insights they can apply to improve their results. Our portfolio of products and services is designed to power travel industry decision-makers through consumer insights, travel performance data, and audience modeling and segmentation.

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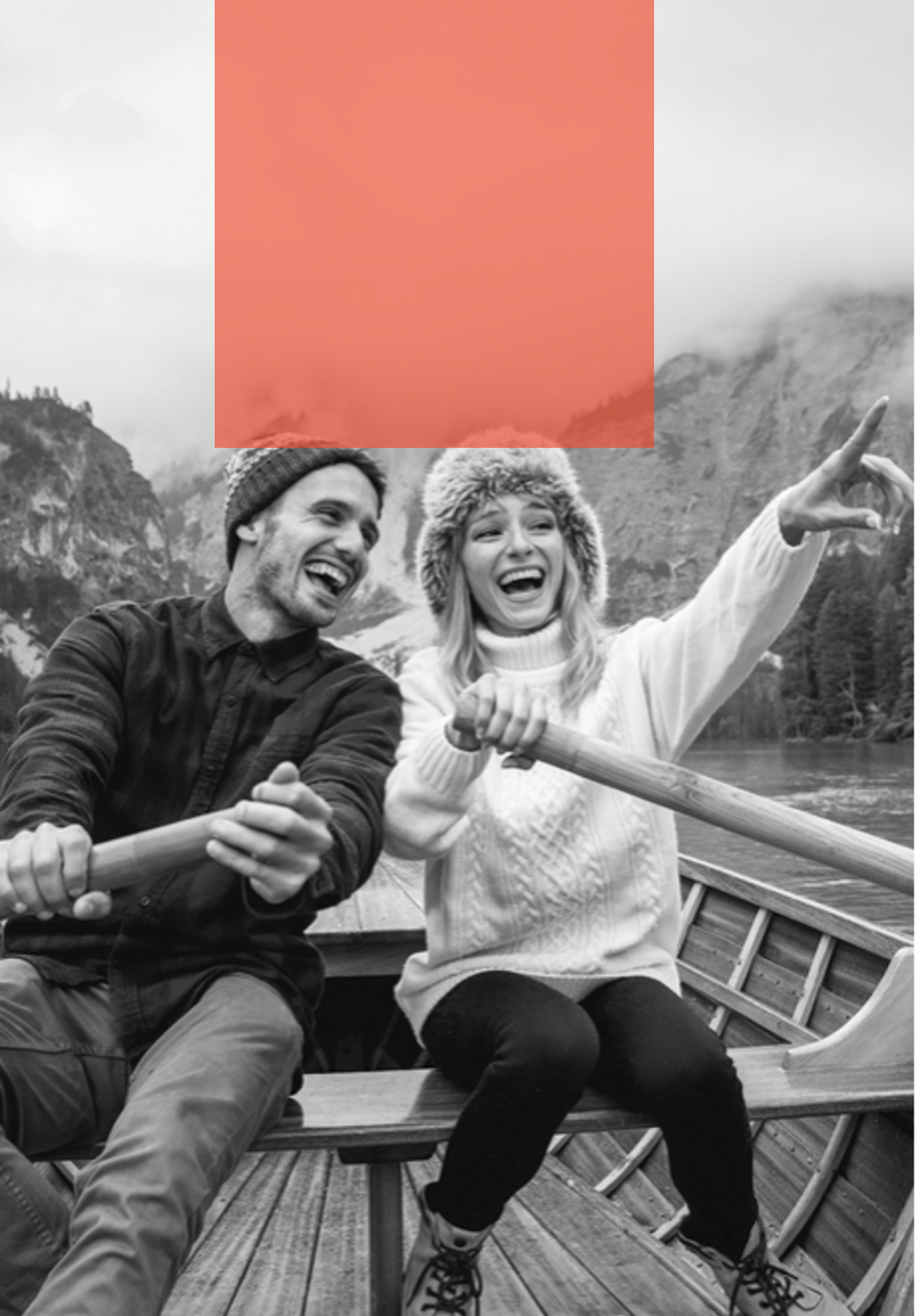
# Survey Methodology

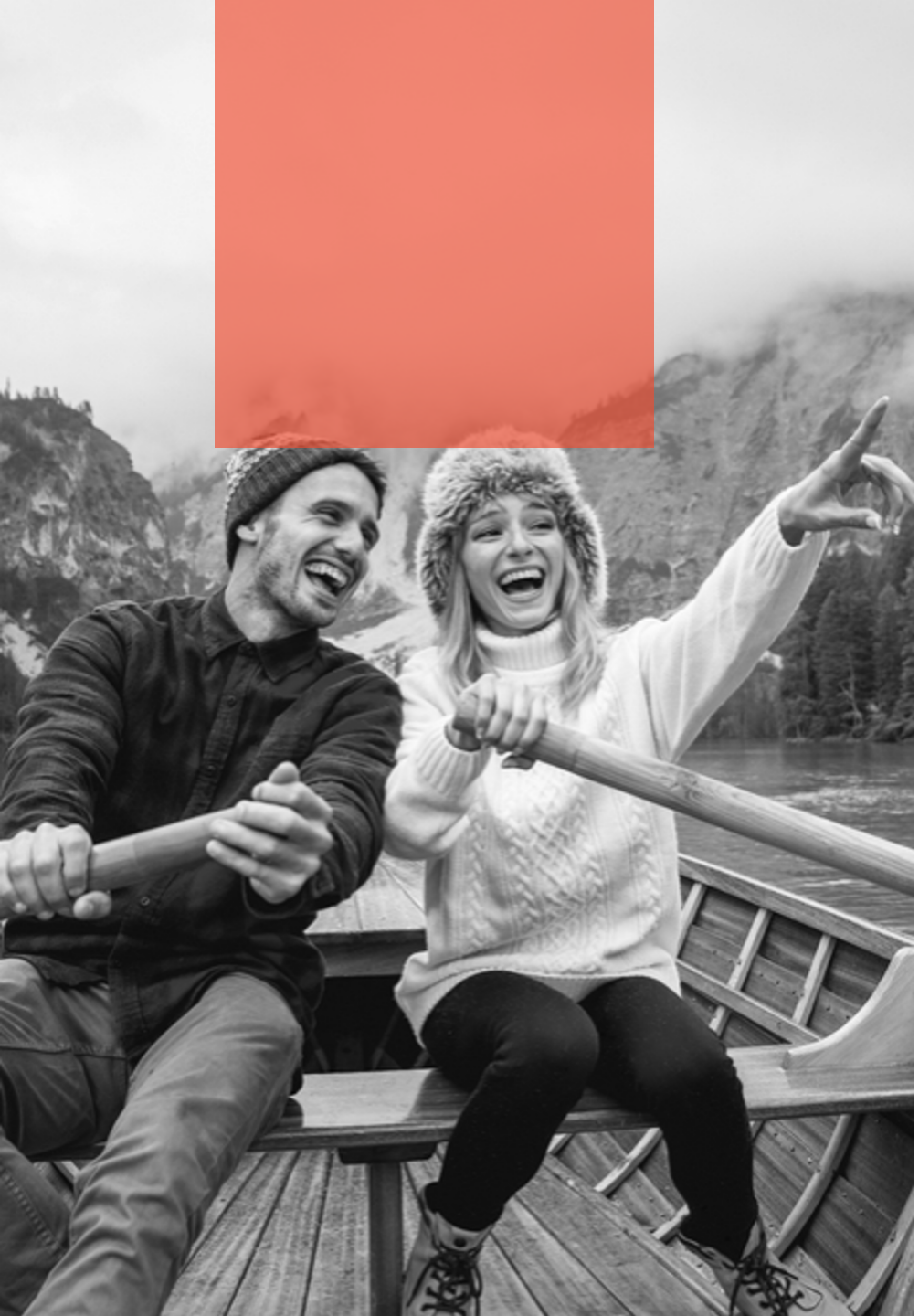
- A random sample of 1,200 respondents representing the U.S. population defined below participates in this online survey each month. Respondents are screened as follows:
    1. 18 years of age or older;
    2. Active travelers who have taken at least one overnight trip for either business or leisure during the past 12 months.
- Data for this wave were collected between November 15–20, 2020.
- The error interval of the statistical estimates appearing in this report (for n=1,200) is +/- 2.8% at the 95% level of confidence.



# / Key Findings

Despite respondents' rising concern about contracting COVID-19, MMGY Global's December (Wave XI) report reveals some encouraging improvement in most travel intentions during the next six months versus the intentions expressed by respondents in November:

- The percentage of respondents likely to take a domestic leisure trip during the next six months remained steady (at 41%) after the six-point decline observed in November.
- The percentage of respondents likely to take a domestic business trip during the next six months increased to 38% from 34% in Wave X. One in 5 (21%) business travelers is likely to attend a conference or convention, up from 17% last month. One in 4 (24%) is likely to attend an off-site business meeting, up from 22%.
- The percentage of respondents likely to take an international flight during the next six months rose to 25% this month, up from 21% in Wave X, reaching the highest level observed to date.
- The percentage of respondents likely to take a river cruise also increased from 17% to 21%, surpassing their likelihood of taking an ocean cruise.



# / Key Findings

- The percentage of respondents likely to travel by personal car during the next six months rose to 67% following a two-month decline.
- Travel by car remains the most likely form of transportation for respondents: One in 5 travelers (20%) is willing to drive more than 500 miles (each way) for a leisure trip.
- As the availability of an approved vaccine becomes more of a reality, the percentage of respondents stating they would get vaccinated immediately rose to 50% from 45% in November. Still, 40% of respondents would “wait at least a few months” to see if it would be effective, and the remainder would decline vaccination.

# IMPACT OF COVID-19 ON TRAVEL PLANS

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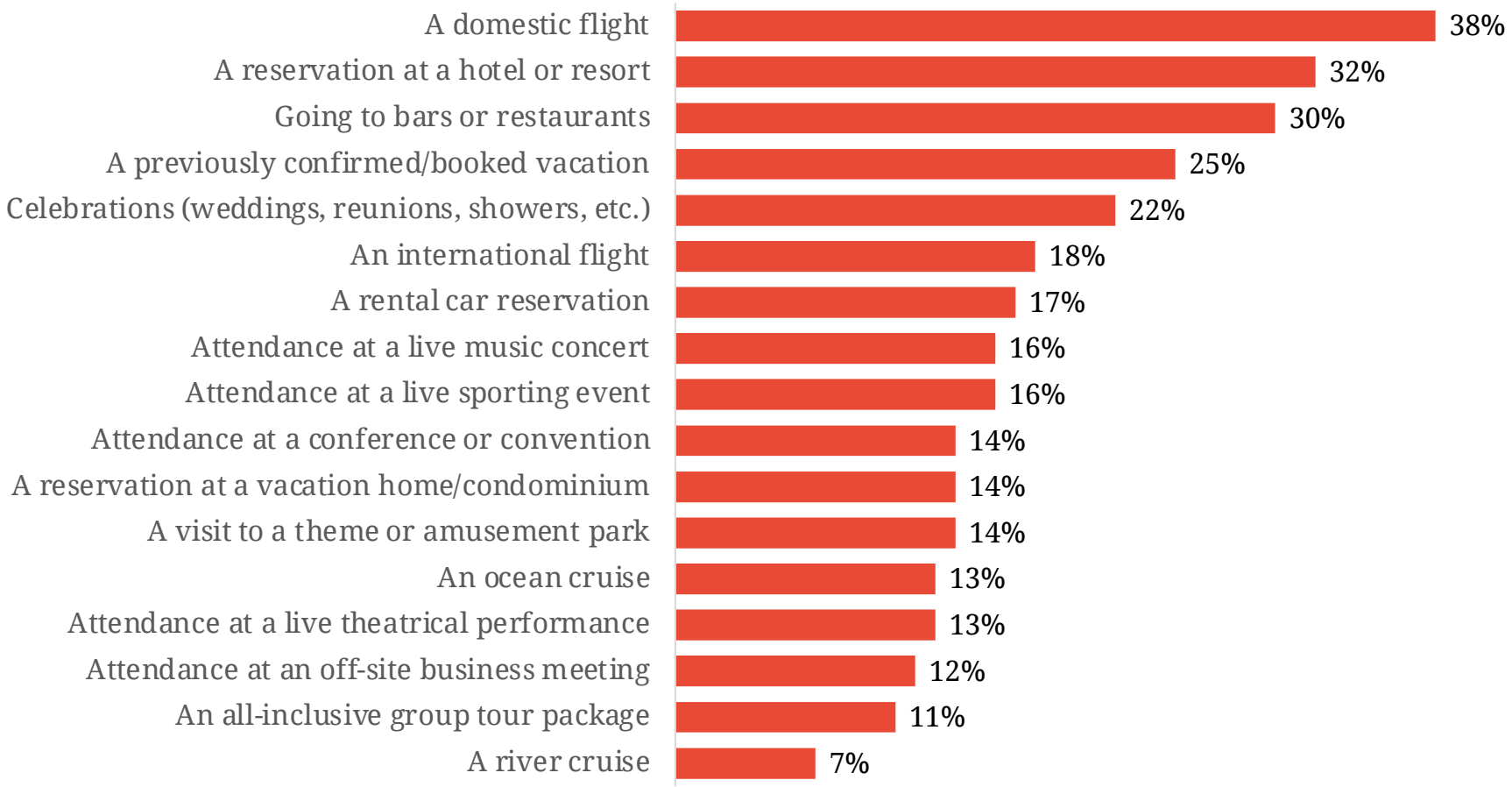
# % Of Respondents Who Planned To Engage In Each Of These Activities Prior To COVID-19




***Question /*** Prior to the coronavirus (COVID-19) outbreak, which of the following were you confirmed/booked to do for a date or timeframe occurring after the coronavirus (COVID-19) outbreak? (n=1,200)

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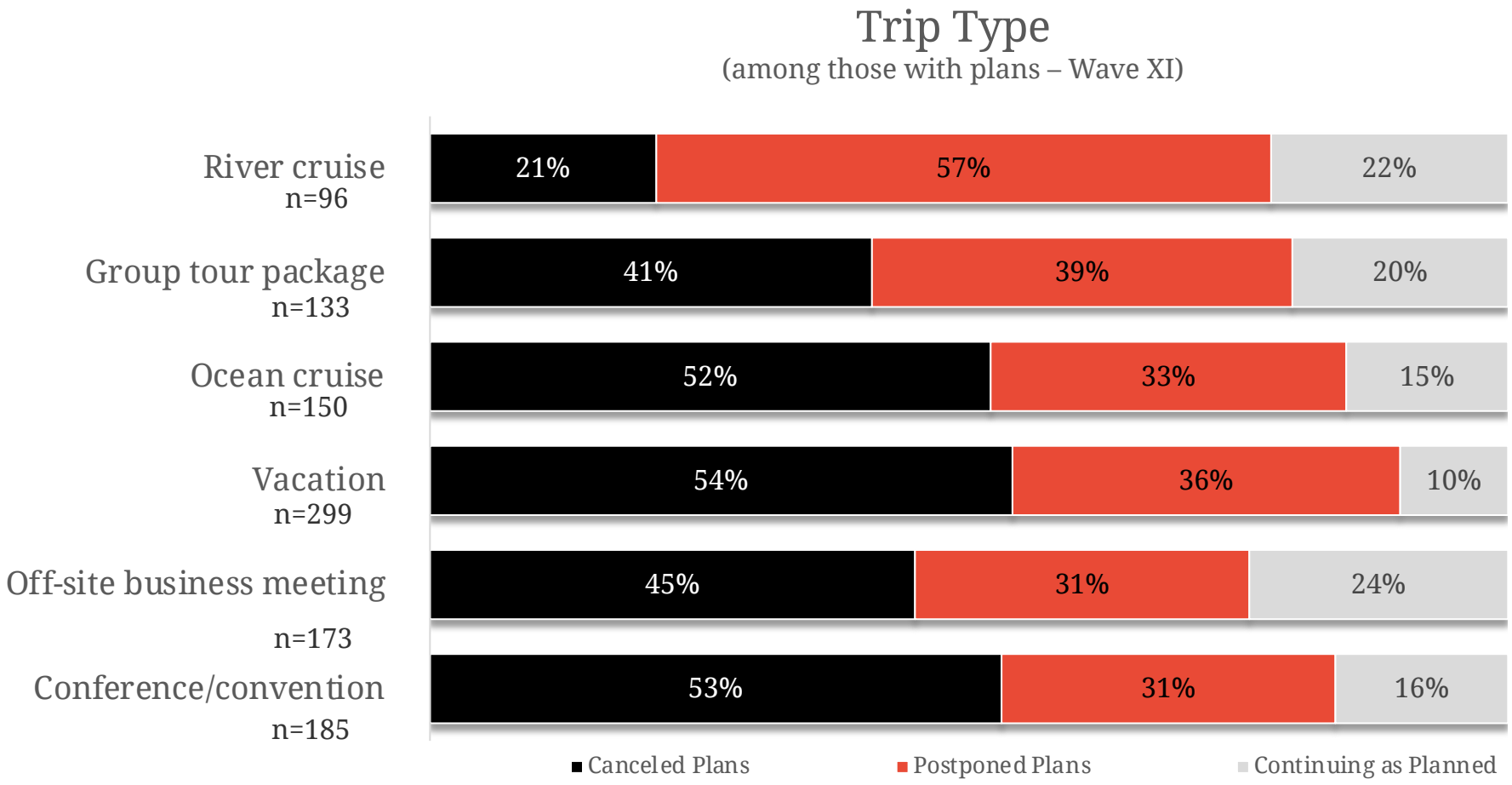
# Cancellations And Postponements Declined For The Following Trip Types With The Exception Of Ocean Cruises And Conferences/Conventions (Compared to November 2020)




***Question /*** Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned?

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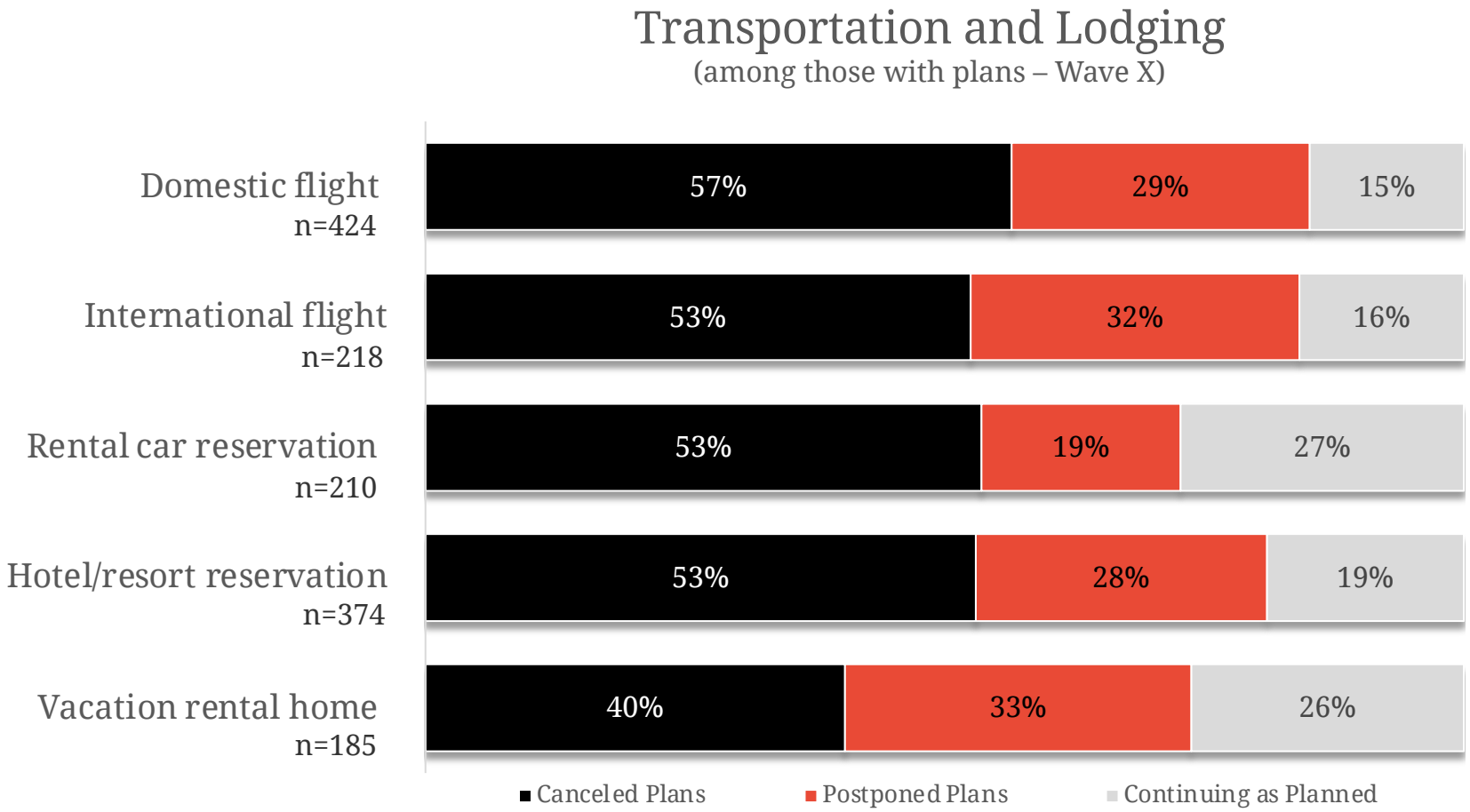
# Cancellations And Postponements Declined For The Following Trip Types With The Exception Of Domestic Flights
## (Compared to November 2020)




***Question /*** Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned? (n=1,200)

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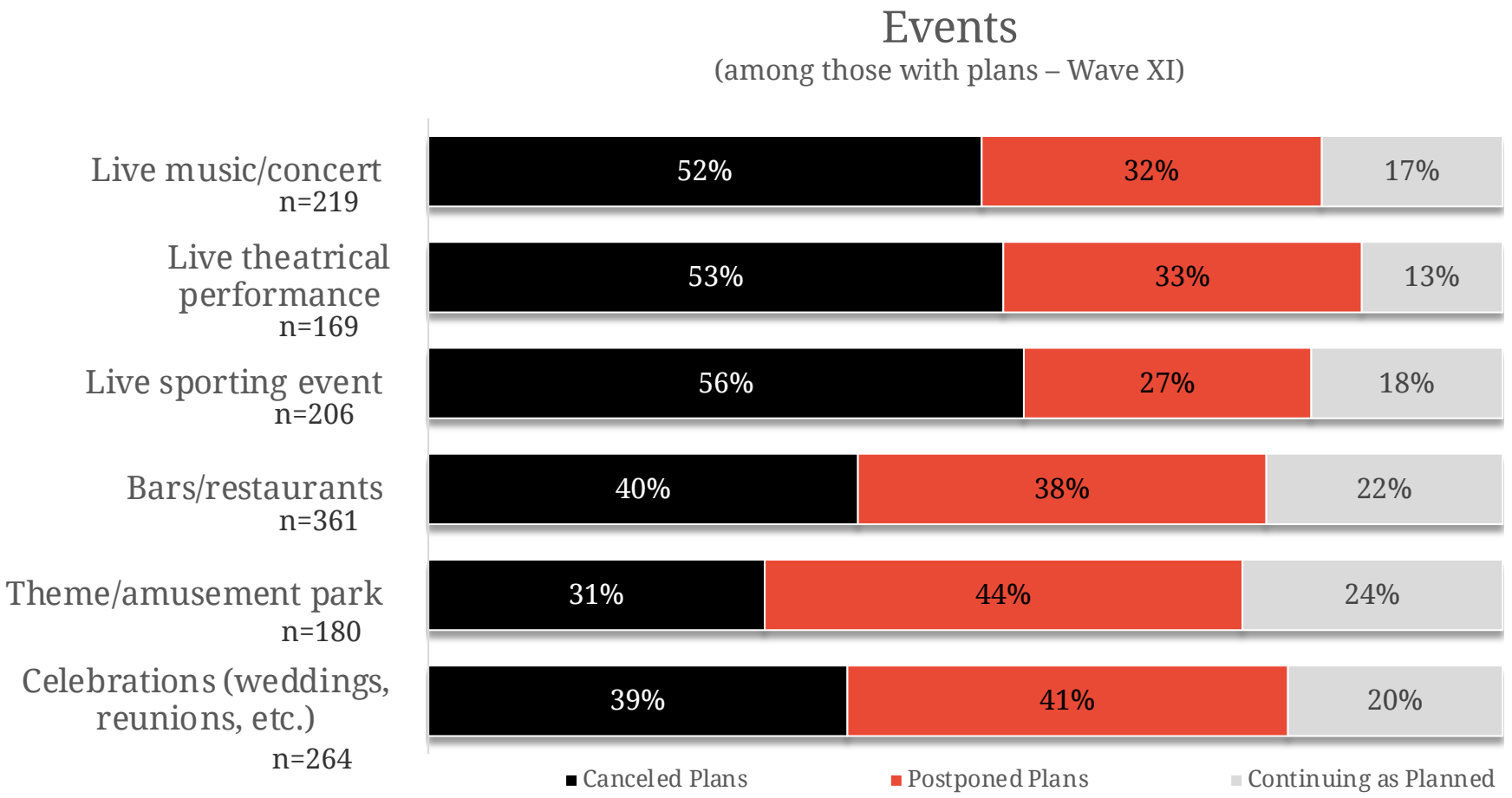
# Cancellations And Postponements Declined For The Following Types of Events With The Exception Of Live Theatrical Performances And Sporting Events
## (Compared to November 2020)




***Question /*** Of the activities you had planned prior to the coronavirus (COVID-19) outbreak, which plans have you canceled, which plans have you postponed, and which plans are you continuing as planned? (n=1,200)



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# TRAVEL INTENTIONS

## LEISURE AND BUSINESS

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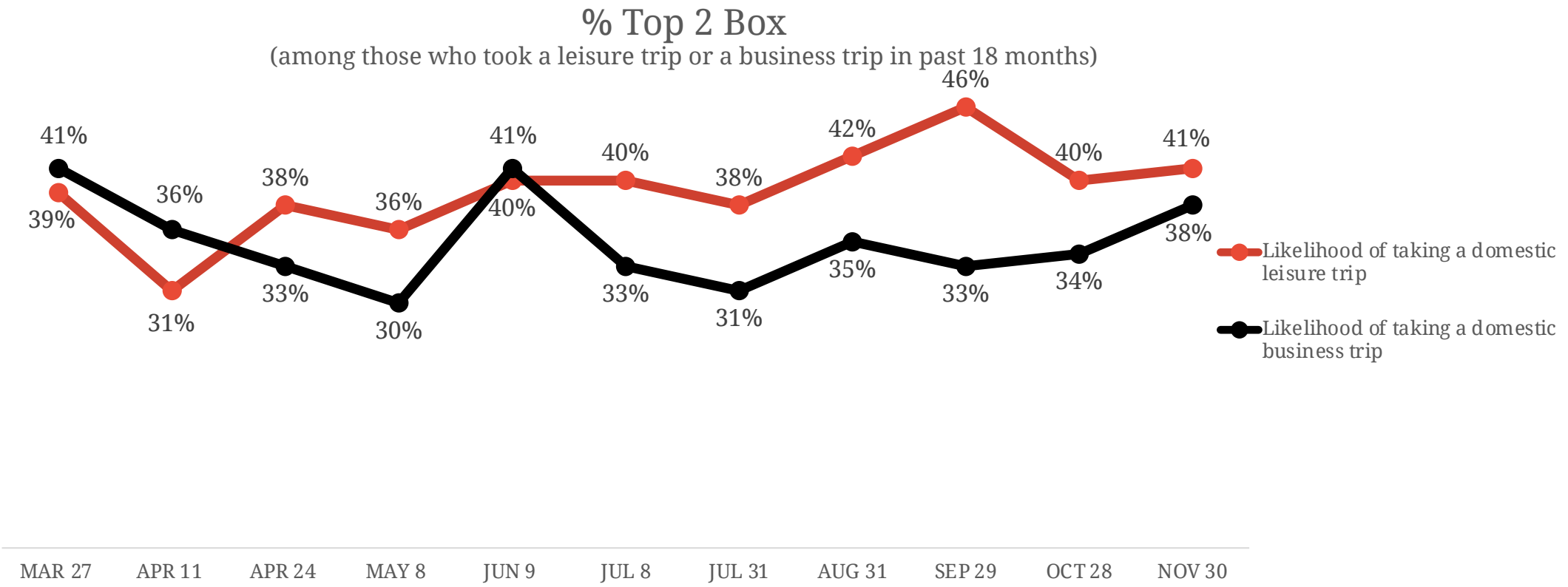
# % Of Respondents Likely To Take A Domestic Leisure Or Business Trip Increased Despite The Spike In New COVID-19 Cases (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months? (Leisure: n=1,161, Business: n=776)

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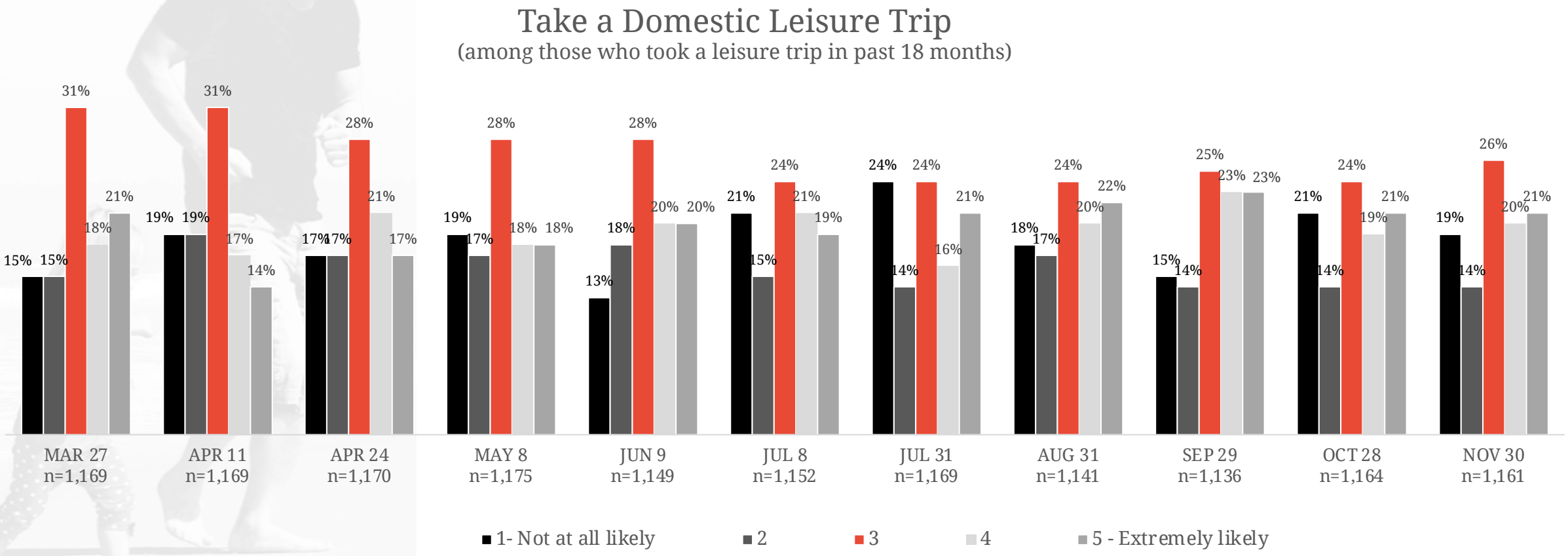
# No Change In % Of Respondents Very/Extremely Likely To Take A Domestic Leisure Trip (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?



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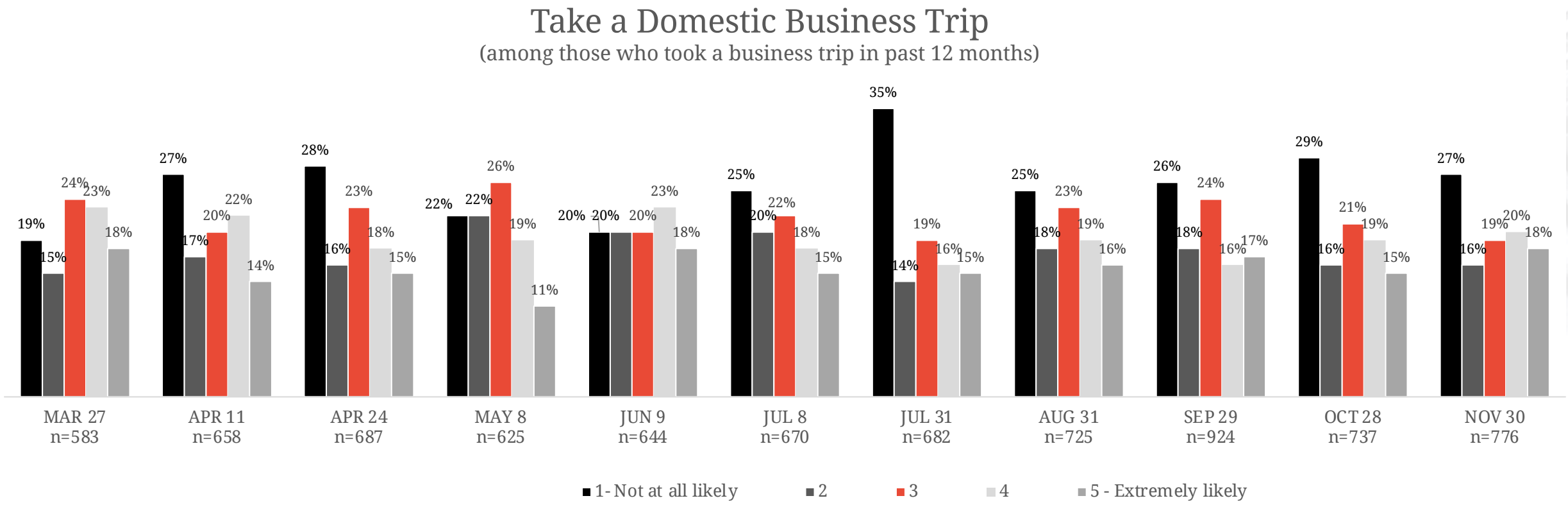
# Increase In % Of Respondents Very/Extremely Likely To Take A Domestic Business Trip (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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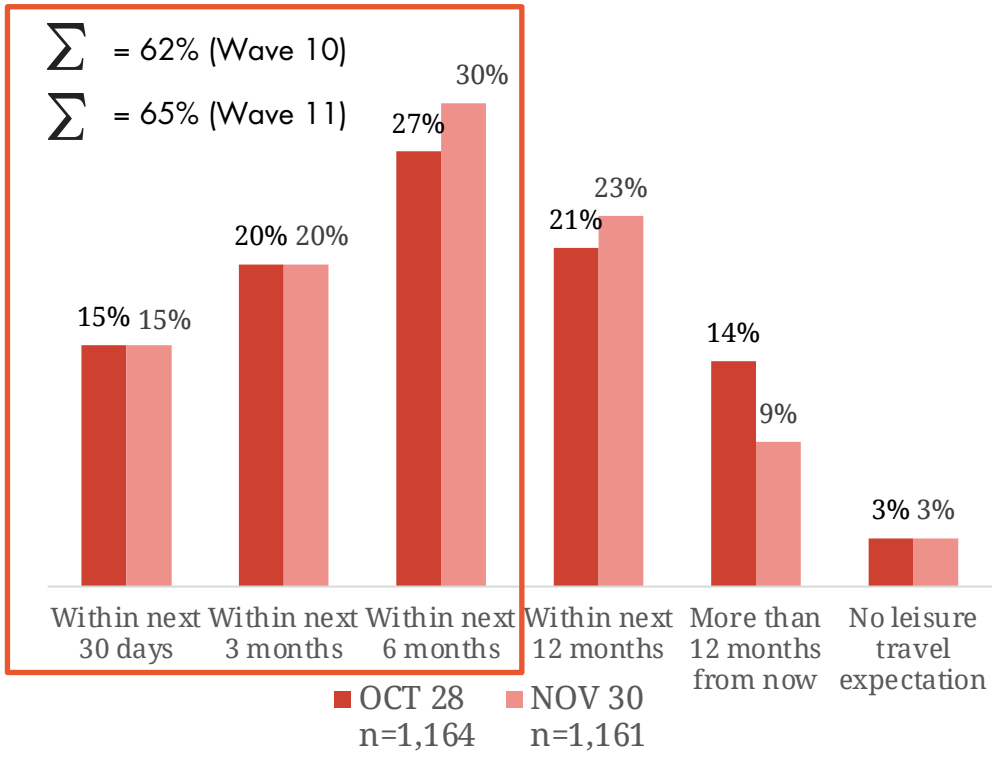
# Slight Increase In % Of Respondents Likely To Take A Leisure Trip And Decline In % Likely To Take A Business Trip (Next Six Months)

## When Expect to Take Next Leisure Trip

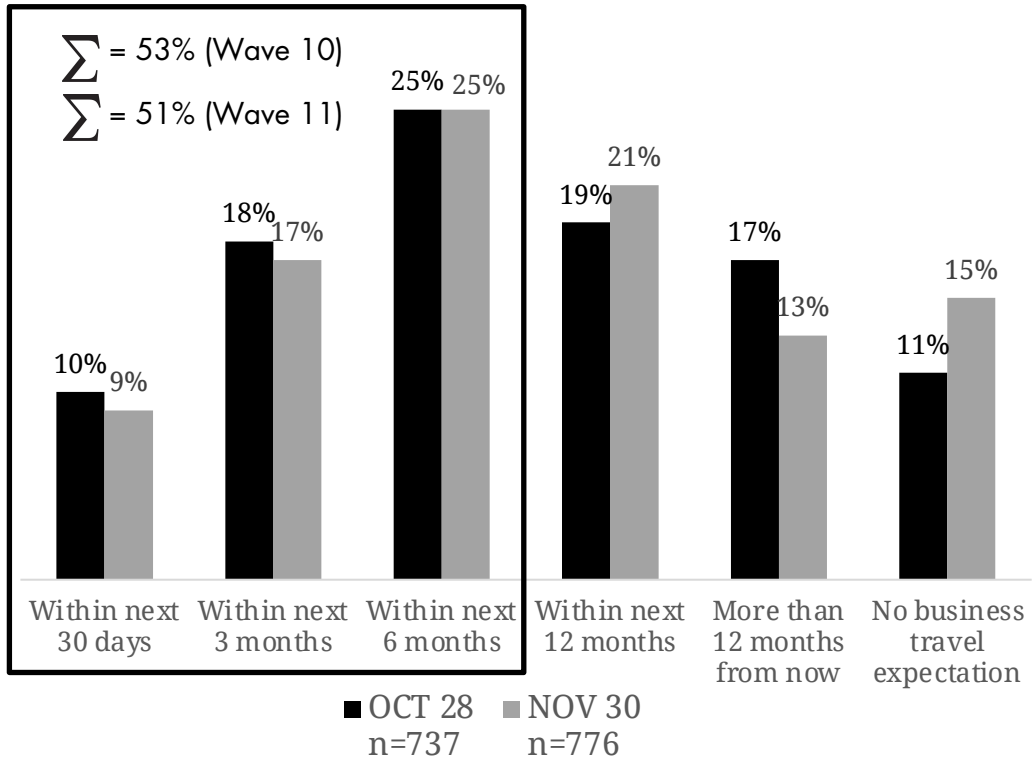
(Among those who took a leisure trip in past 18 months)




***Question*** / When do you expect to take your next leisure trip?

## When Expect to Take Next Business Trip

(Among those who took a business trip in past 18 months)




***Question*** / When do you expect to take your next business trip?

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# TRAVEL INTENTIONS

BY CATEGORY

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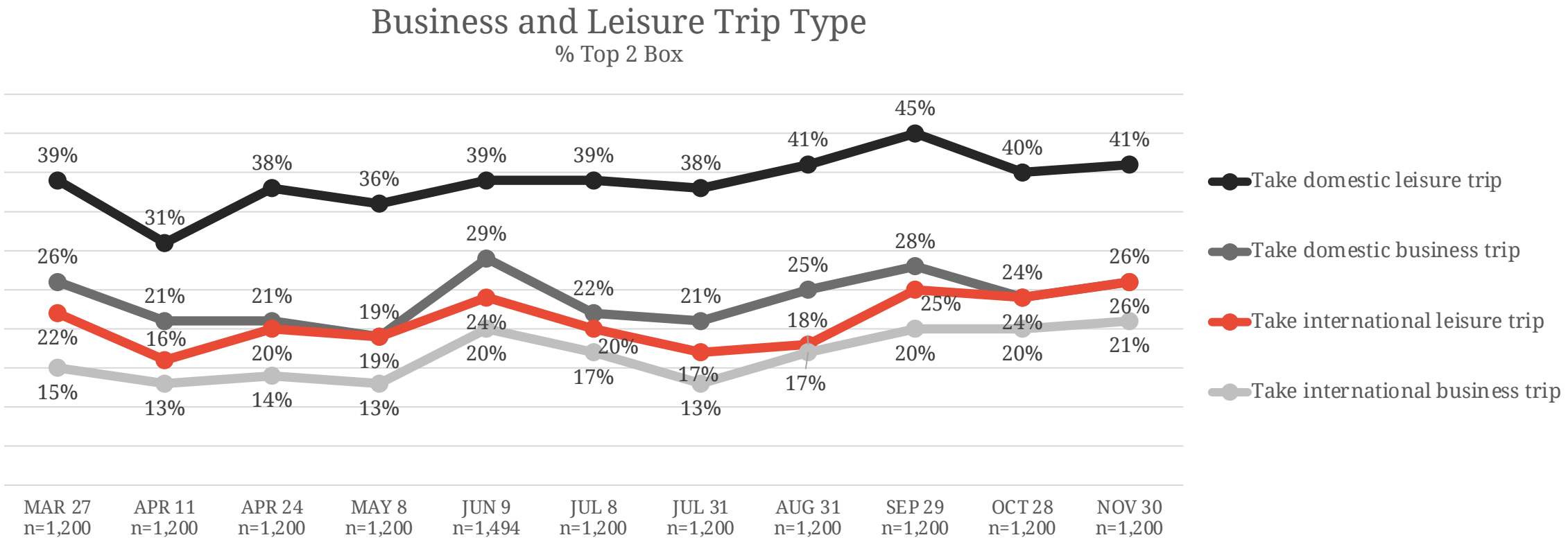
# Slight Increase In % Of Respondents Likely To Take A Domestic Or International Trip For Business Or Leisure (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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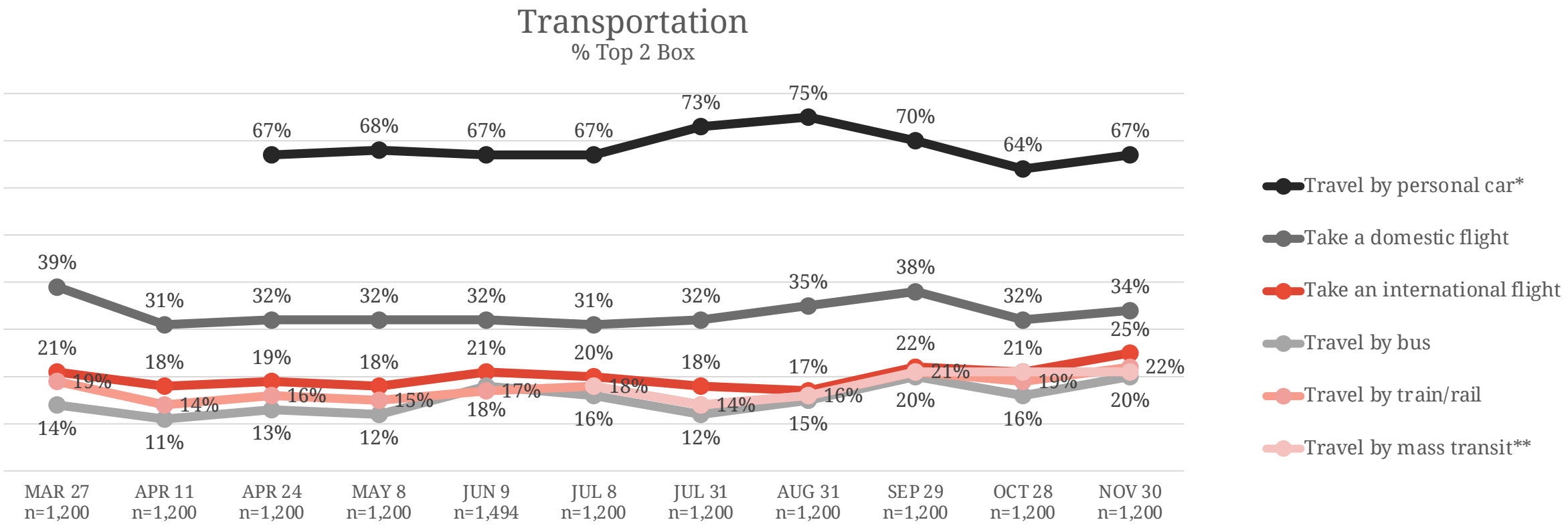
# % Of Respondents Likely To Travel By Personal Car, Air, Bus, Rail and Mass Transit Increased (Next Six Months)




*Added 4/24
**Added 7/8

***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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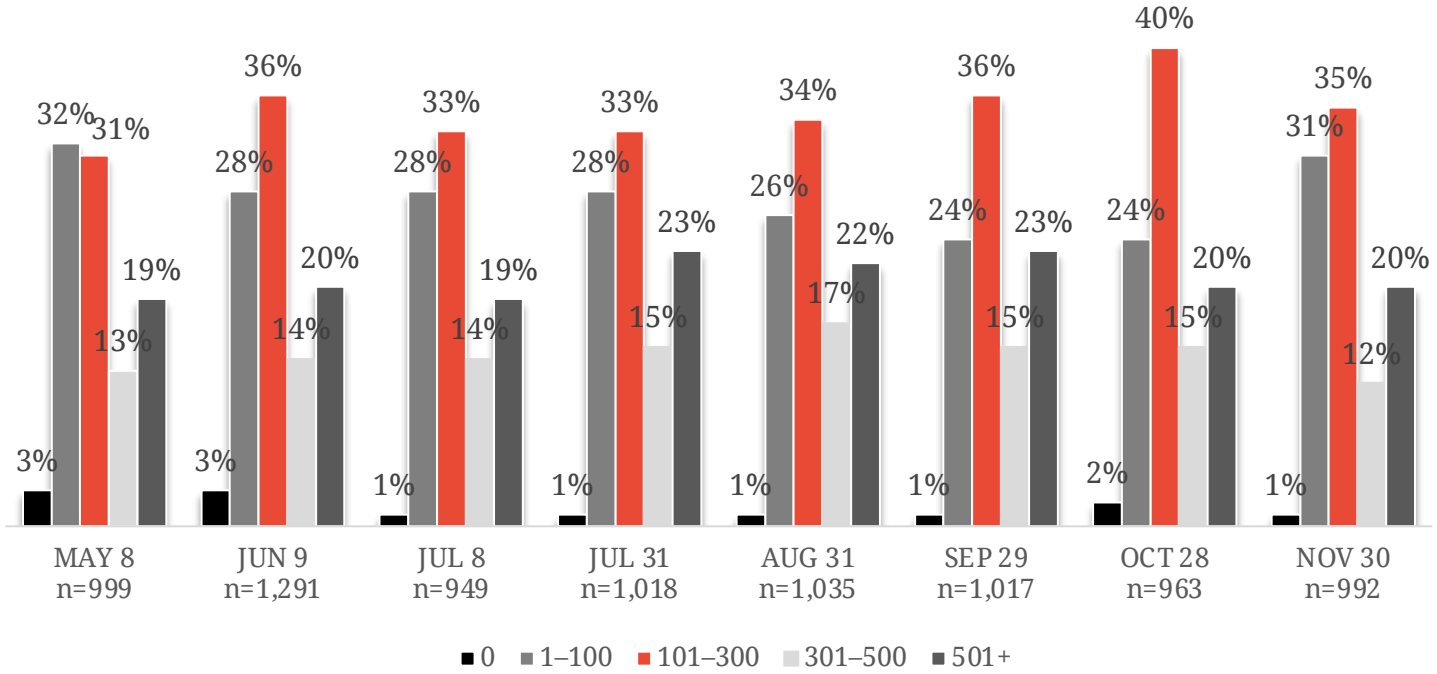
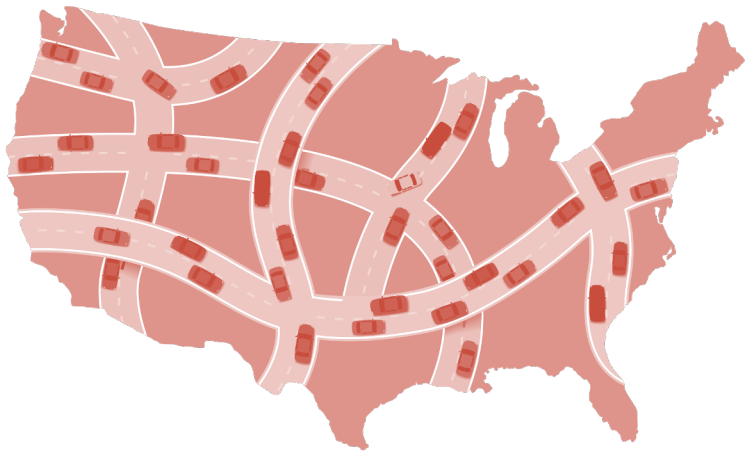
# One in 5 Respondents Is Willing To Drive More Than 500 Miles (Each Way) For A Leisure Trip (Next Six Months)

Among Those Likely to Travel by Personal Car During Next 6 Months



***Question /*** You indicated you are likely to travel by personal car during the next 6 months. How many miles away from home (one-way) would you be willing to drive for a leisure trip?

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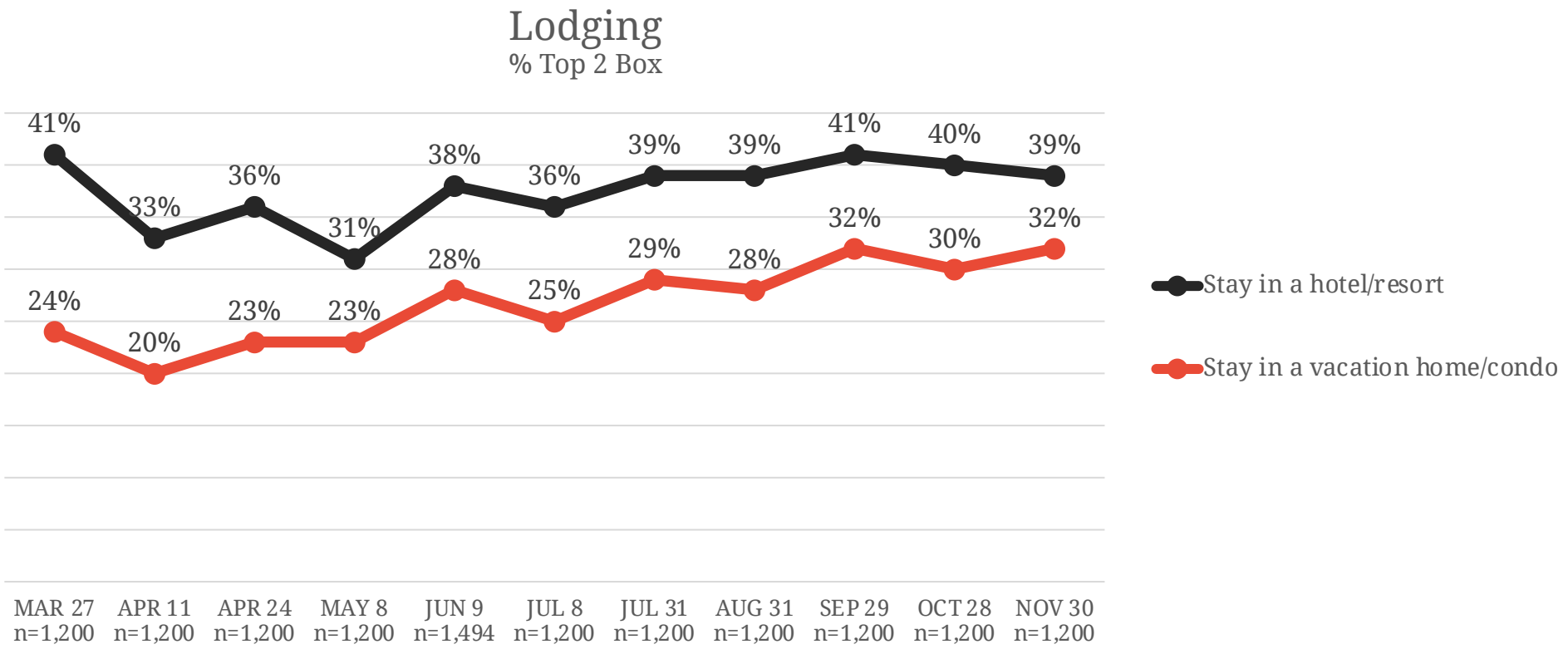
# % Of Respondents Likely To Stay In A Hotel/Resort Declined Slightly, While % Likely To Stay In A Vacation Home/Condo Increased (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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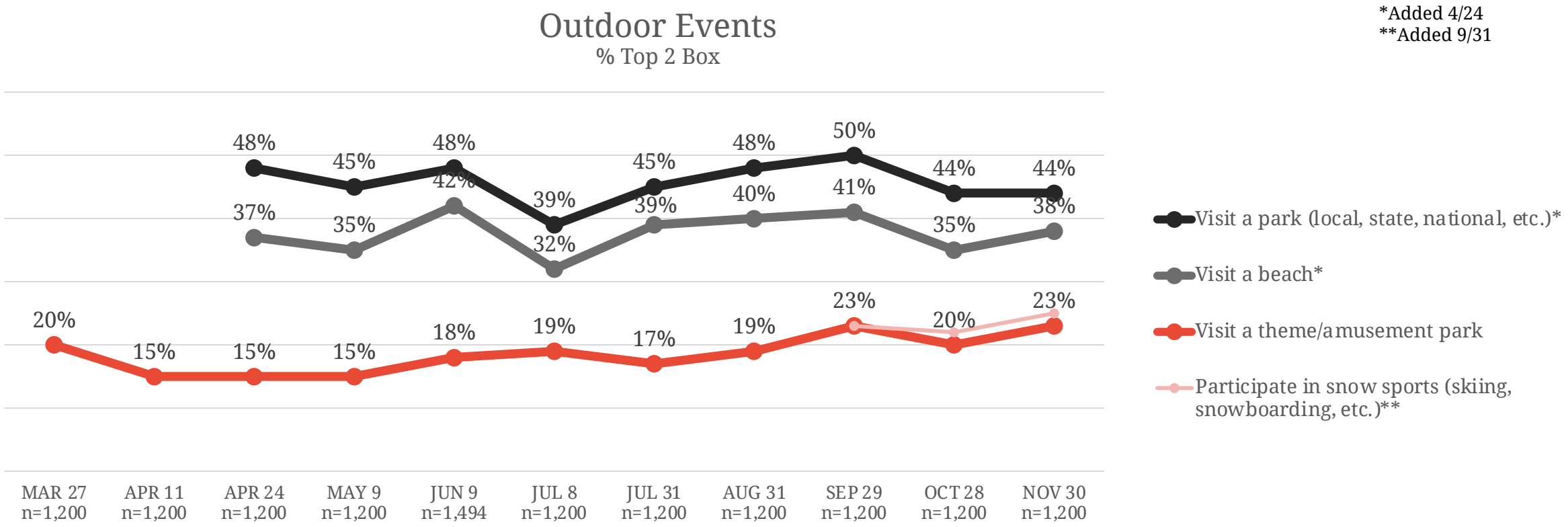
# % Of Respondents Likely To Engage In Most Of The Listed Outdoor Activities Increased (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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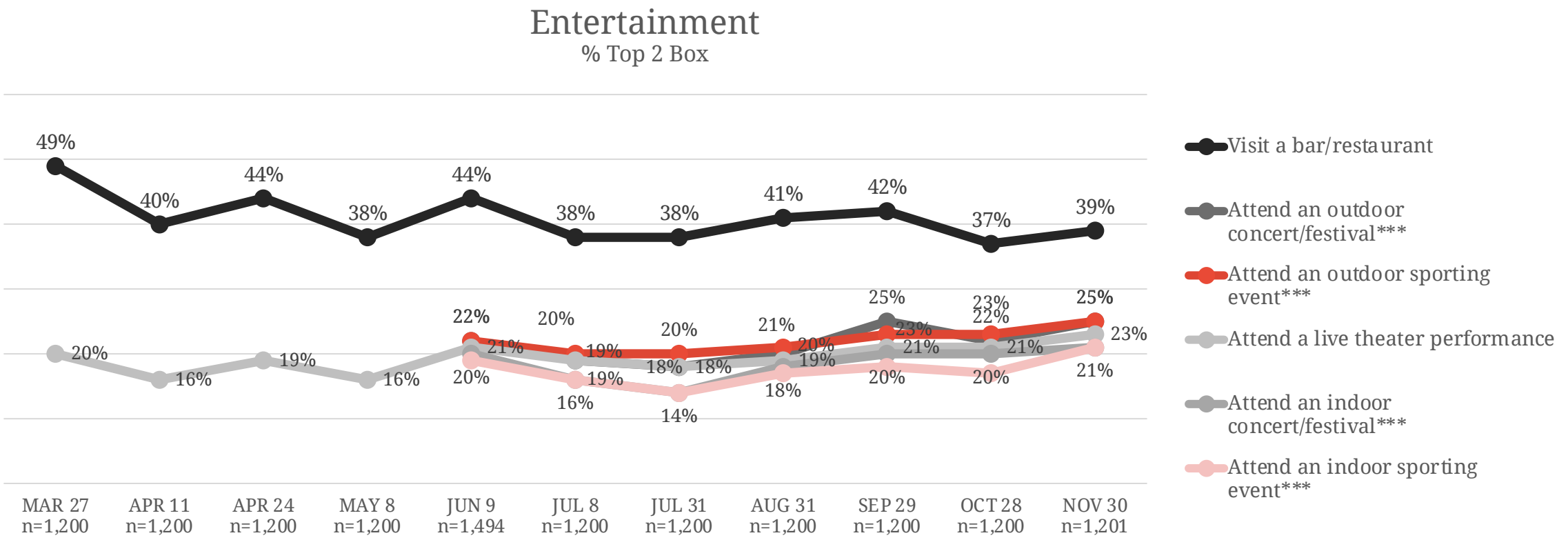
# % Of Respondents Likely To Engage In The Listed Forms Of Entertainment Increased (Next Six Months)




***Added 6/9

***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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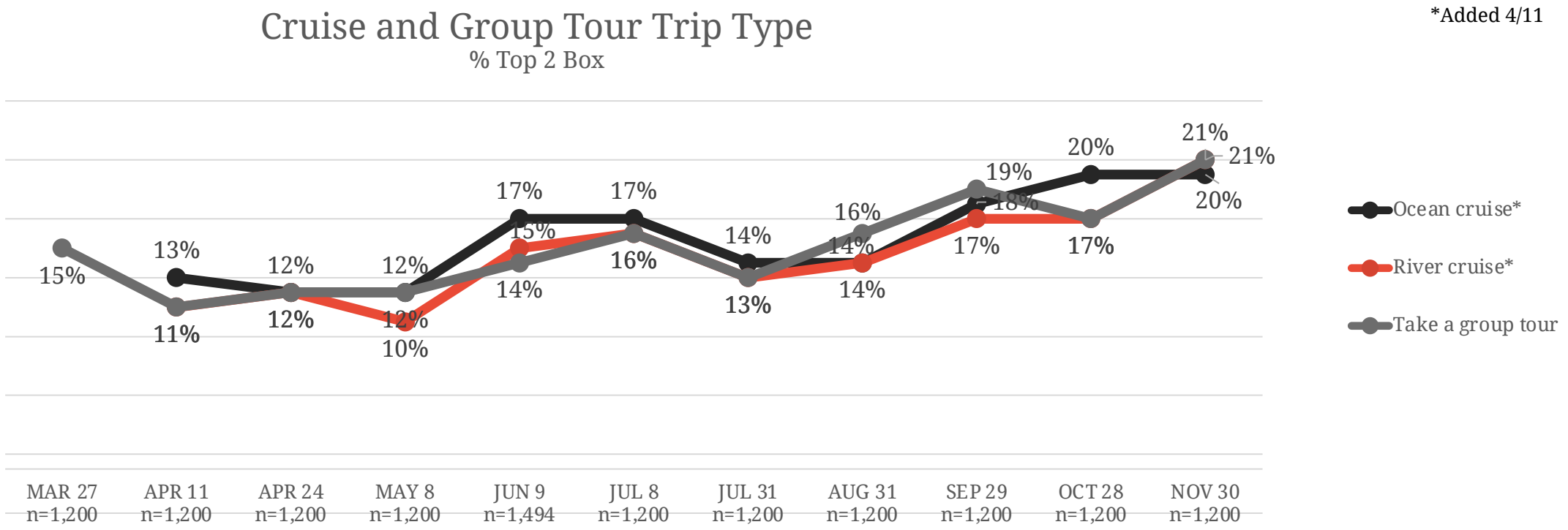
# % Of Respondents Likely To Take A Group Tour Or River Cruise Increased, While % Likely To Take An Ocean Cruise Remained Essentially Unchanged

## (Next Six Months)




***Question*** / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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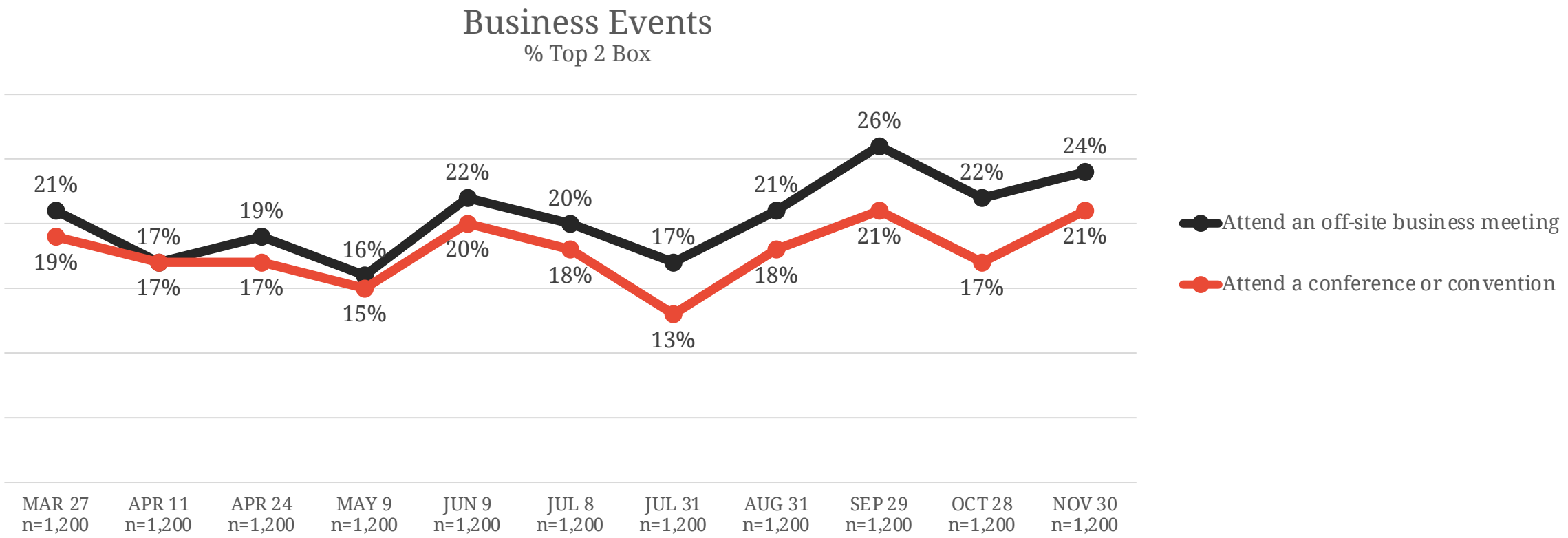
# % Of Respondents Likely To Attend An Off-Site Business Meeting, Conference Or Convention Increased (Next Six Months)




***Question /*** Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months?

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# COVID-19 CONCERNS AMONG TRAVELERS

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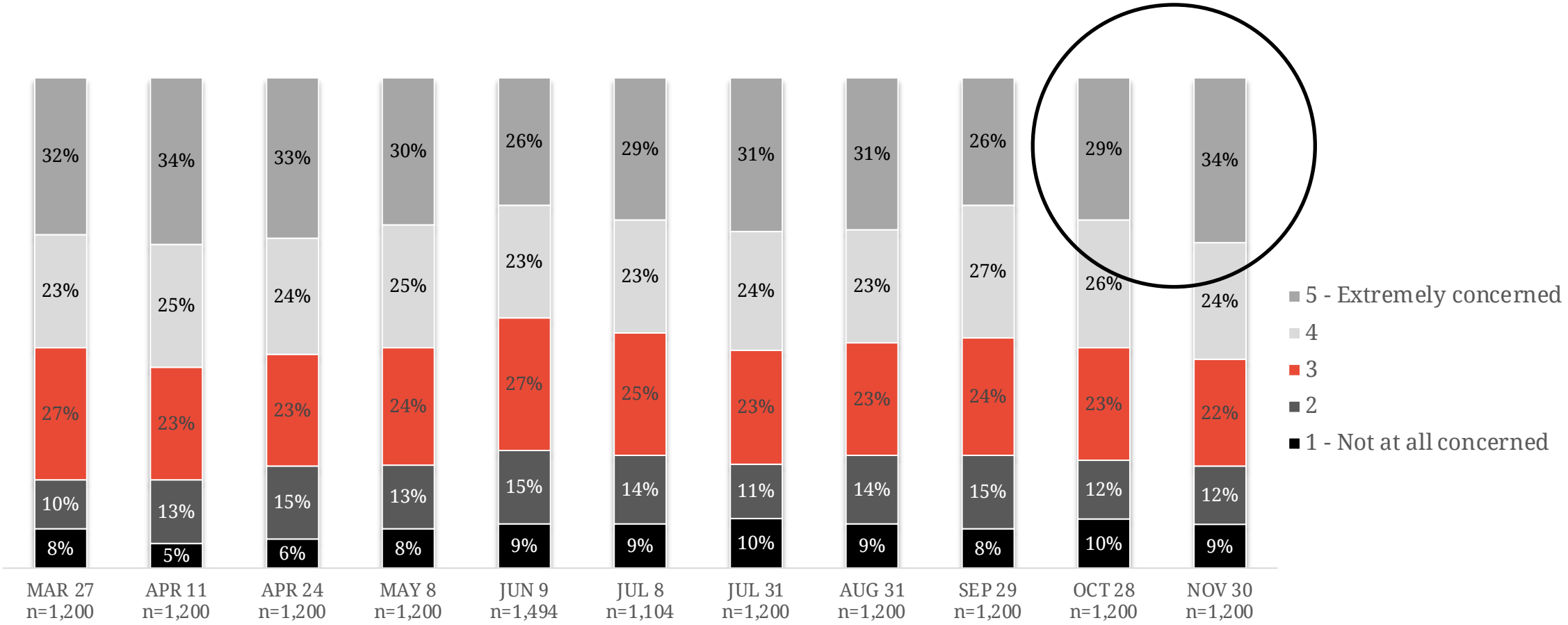
# Percentage Of Respondents "Extremely" Concerned About Contracting COVID-19 Increased




***Question /*** Using a scale of 1 (not at all concerned) to 5 (extremely concerned), how concerned are you that you or other members of your household will contract coronavirus (COVID-19)?

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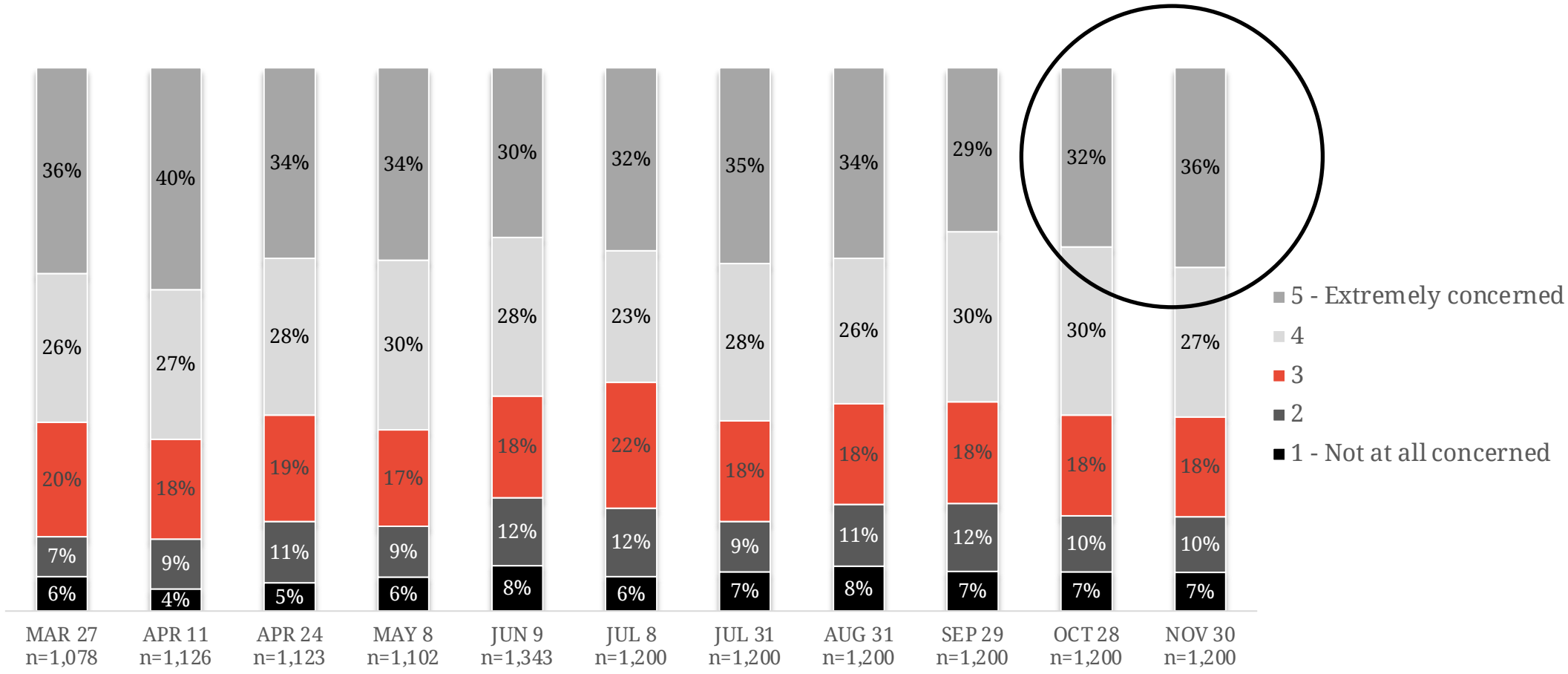
# Percentage Of Respondents “Extremely” Concerned About Household Members Contracting COVID-19 Increased




***Question /*** Using a scale of 1 (not at all concerned) to 5 (extremely concerned), how concerned are you that you or other members of your household will contract coronavirus (COVID-19)?

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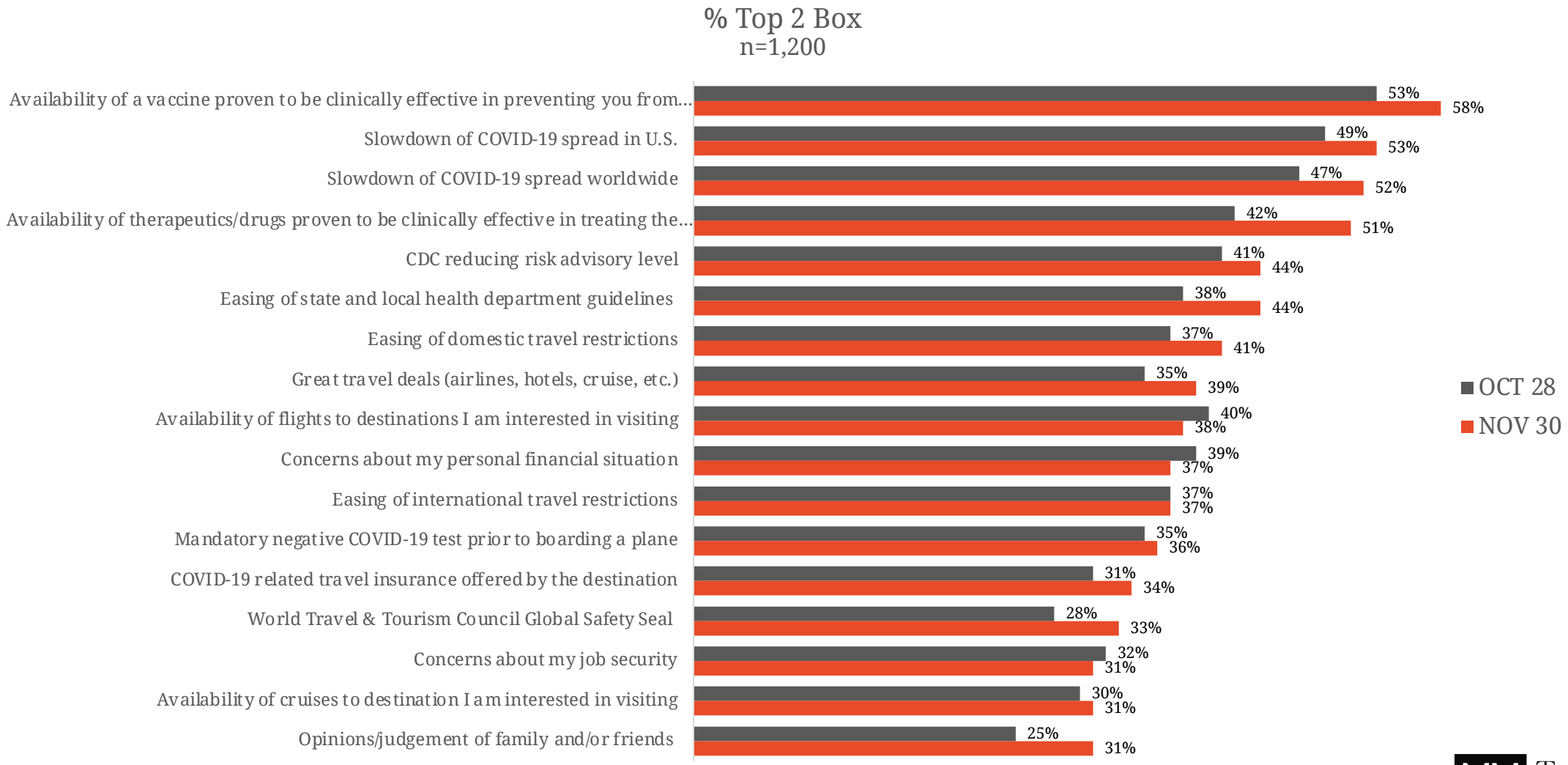
# Availability Of A Vaccine Proven To Be Clinically Effective Is Most Important Consideration Affecting Future Travel Plans




***Question /*** Using a scale of 1 (no impact) to 5 (extreme impact), how will each of the following impact your decision to take a trip primarily for leisure purposes during the next 6 months?

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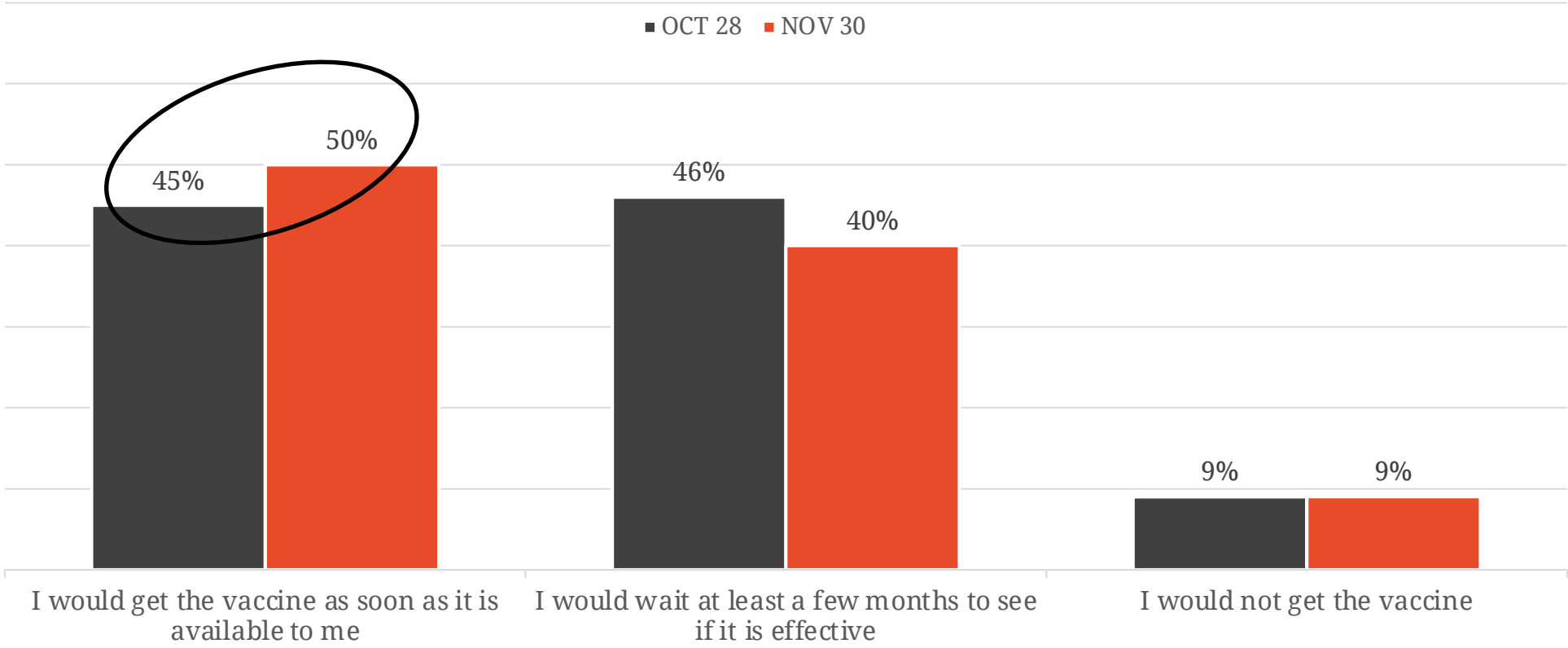
# Half Of Respondents Would Get A COVID-19 Vaccine When One Becomes Available, While Half Would Wait Or Decline To Be Vaccinated




***Question /*** Which of the following best describes your plan for if/when a vaccine becomes available?

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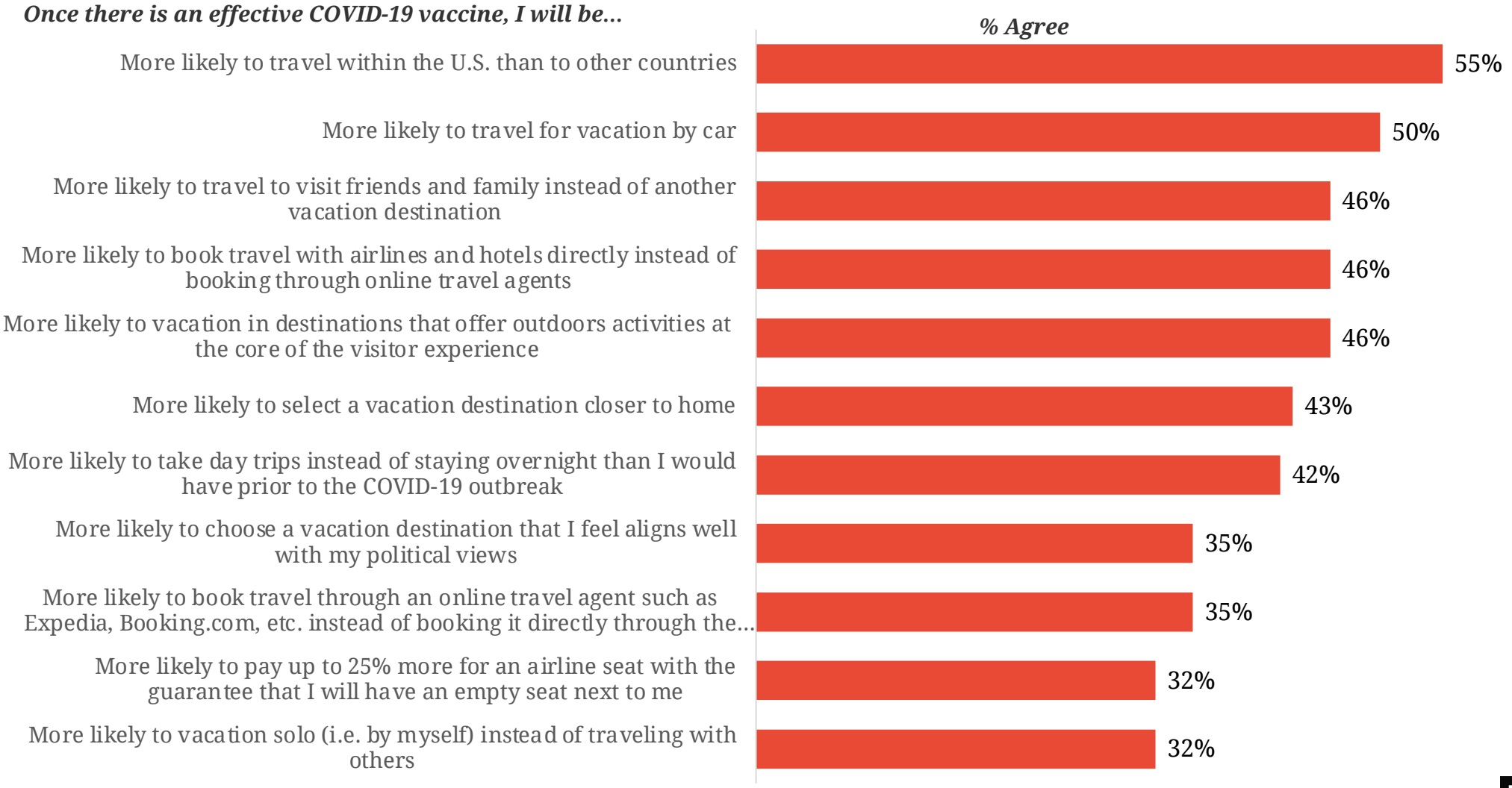
# Availability Of An Effective Vaccine Will Have Greatest Impact On Domestic Travel and Leisure Travel By Personal Car




***Question /*** Once there is an effective COVID-19 vaccine, I will be...(n=1,200)

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# DEMOGRAPHICS

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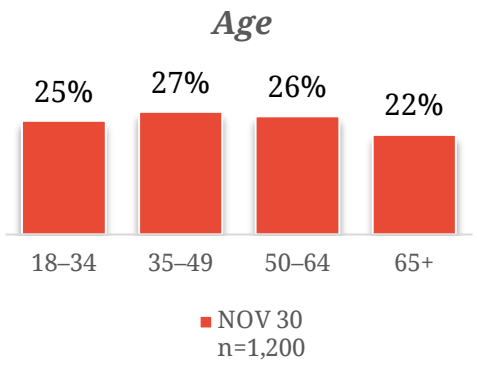
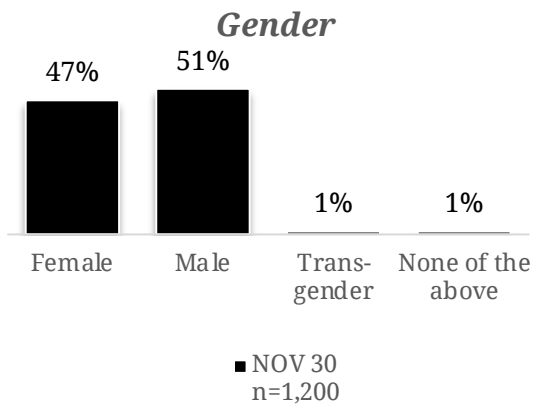
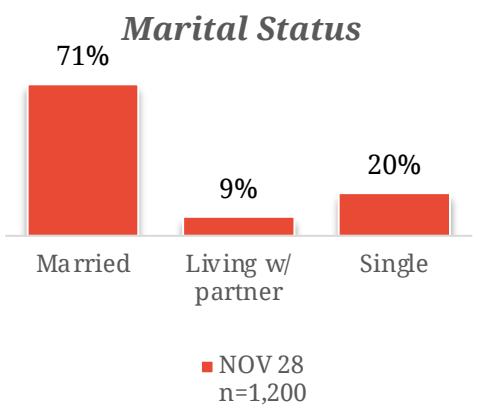
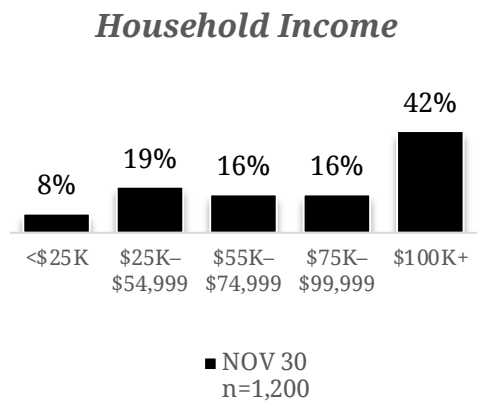
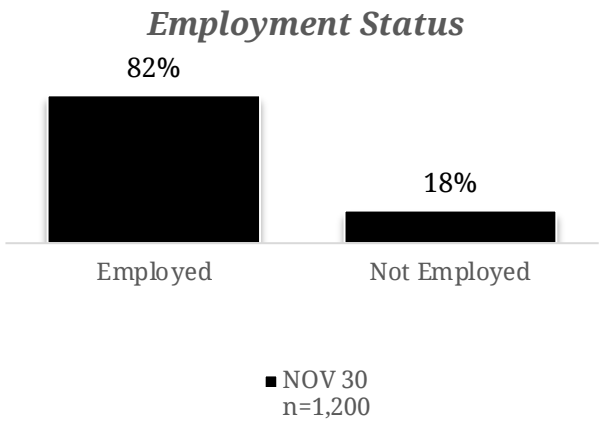
# Respondent Demographics

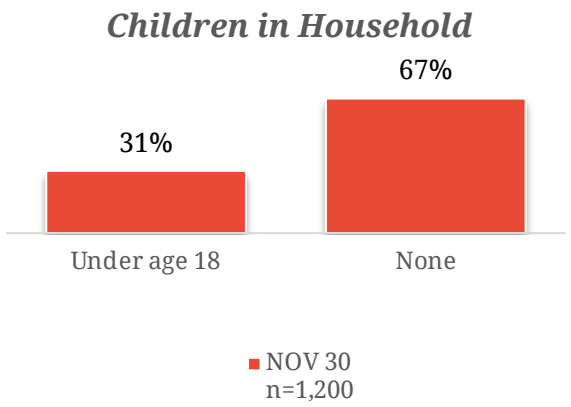


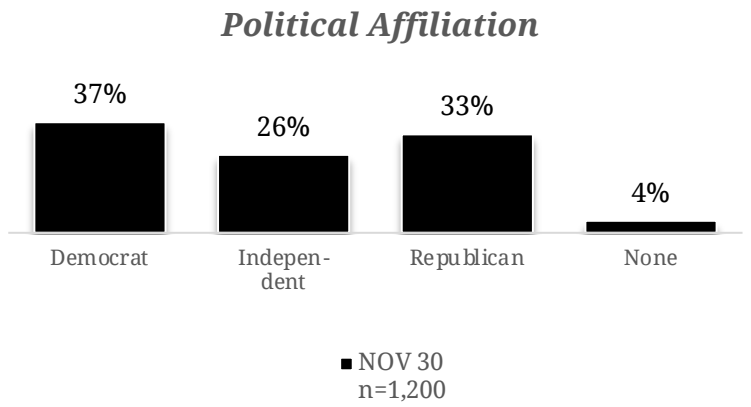

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