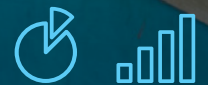




ICF next+

Travel and tourism recovery report



Frequent traveler findings
from ICF Next's COVID-19
Monitor Survey

May 2021

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All graphs in this
report are built using
Datawrapper



Since March 2020, ICF and ICF Next have been running a census-based survey of the U.S. population regarding their attitudes and behaviors around public health measures. As the COVID-19 pandemic has evolved, so has the survey. Questions have been added to understand how individuals' personal finances and employment status have been impacted, as well as media consumption habits, demographics, and adherence to evolving social distancing guidelines.

In the first refresh of our COVID-19 Monitor Survey since December, we surveyed 510 frequent travelers (individuals who reported traveling out of state for business or pleasure either weekly, monthly, or a "few times per year" prior to the outbreak of COVID-19). The survey posed a series of newly-designed questions regarding the impact of the pandemic on their personal and professional lives, pandemic travel behaviors, anticipated future behaviors, responses to vaccination efforts, and public health measures and timing of future travel—timed to the nationwide availability of COVID-19 vaccines to all adults.

The results show a frequent traveler population eager and planning for major returns to pre-pandemic travel behaviors through the summer and fall. Some additional key findings outlined in the data that follows includes:

- Frequent travelers have a high degree of confidence in travel brands' capabilities to respond to the pandemic.
- Frequent travelers have experienced a heavy economic impact from the pandemic.
- Frequent travelers are more likely to be vaccinated and have a completed vaccine series than infrequent travelers.
- Frequent travelers' comfort with travel today varies widely from destination to destination.
- Frequent travelers' plans were heavily impacted in 2020 but they are planning big returns to travel in 2021 and beyond.

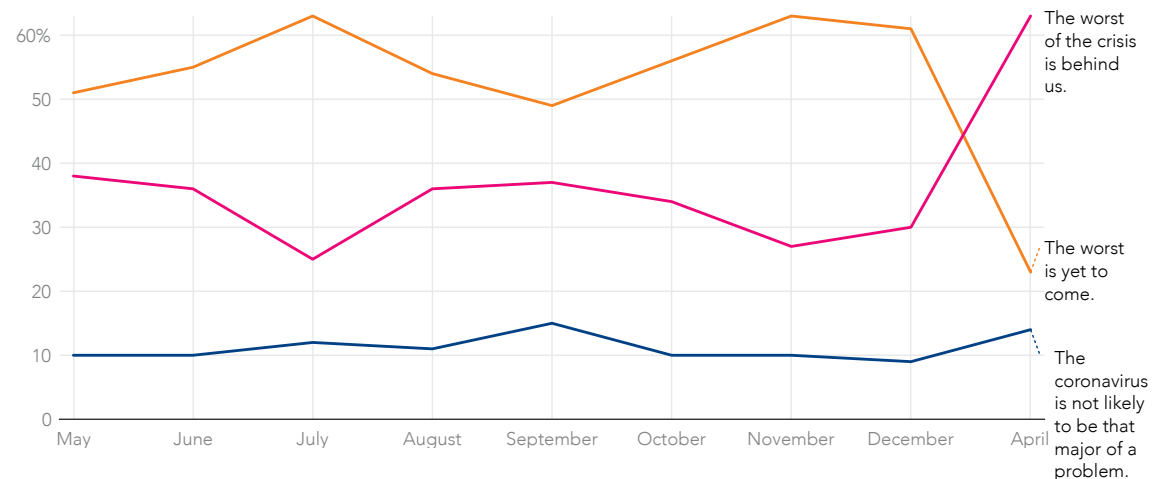


- Respondents were drawn from a national, mobile, nonprobability panel of 2.5 million people in the U.S.
- The initial invitation for each survey was sent by app notification via cell phone to a census-balanced (age, gender, and race) sample of approximately 3,000 adult panel members each month.
- Three reminders via app push notification were sent to non-respondents over a period of a few days.
- Respondents received up to a \$4 incentive for participation.
- The web-based interview was approximately 20 minutes.
- Survey response rates (AAPOR RR 1) varied from 21%-33%.
- While much data we have seen in the market is focused on all travelers, the data presented in our survey pertains only to responses from “frequent travelers.” We defined frequent travelers as those who reported traveling out of state for business or pleasure, weekly, monthly or a “few times per year” prior to the outbreak of COVID-19.
- With this wave, we updated our survey to include a new set of questions focused on anticipated returns to pre-pandemic travel behaviors and the associated anticipated timing.

Since the arrival of FDA-approved vaccines in December, frequent traveler attitudes regarding the course of the pandemic essentially completely flipped. Frequent travelers now overwhelmingly believe that the “worst of the crisis is behind us,” at a level that is similar to the number who believed the “worst was yet to come” in November and December.

Frequent traveler attitudes about the pandemic track closely with surges and declines in case positivity rates.

Which of the following best describes your feelings about the coronavirus (COVID-19) in the United States?



* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.



As the national vaccination effort continues to ramp up, frequent travelers' belief that they will personally get sick with COVID-19 has dropped to new lows since the start of our survey.

While a clear majority of frequent travelers have "a great deal" of confidence or "a fair amount" of confidence in hotel and airline brands to deal with the pandemic, almost one-third of travelers remain doubtful of the ability of companies in these categories to appropriately deal with the ongoing pandemic.

How much confidence do you have in the following organizations to deal with the outbreak of the coronavirus (COVID-19)?

■ A great deal ■ A fair amount ■ Not very much ■ No confidence at all ■ Prefer not to answer

Airlines



Hotels

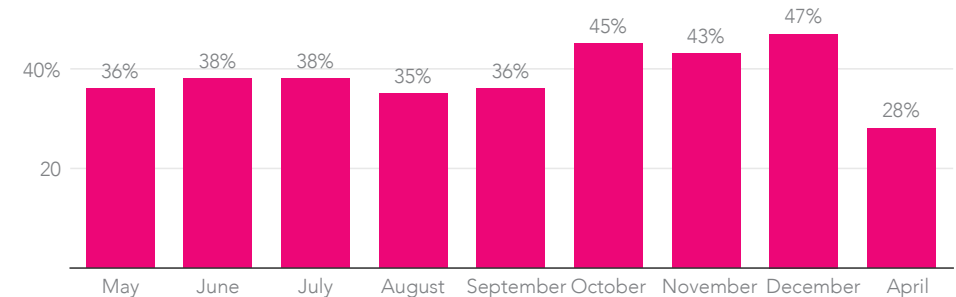


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22

How likely do you think it is that you, personally, will get sick with coronavirus (COVID-19)?

28% of frequent travelers in April feel that it is "somewhat likely" or "very likely" that they will get sick with coronavirus, down from 47% in December.



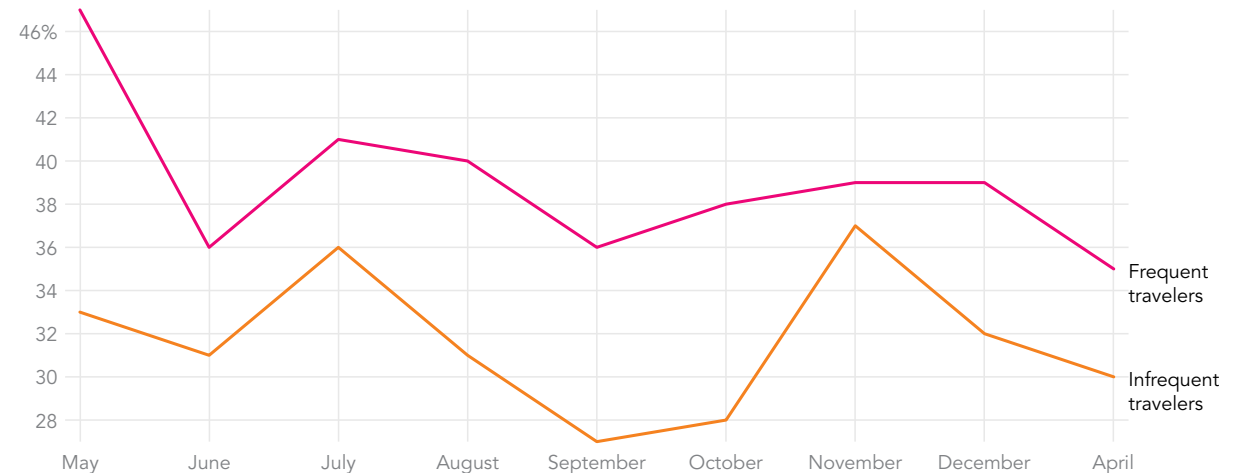
* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Overall, the pandemic has hit frequent travelers particularly hard. They are more likely to report that their lives have been disrupted “a lot” than infrequent travelers, and higher percentages report decreased income or work and/or salary reductions than respondents to our general consumer survey.

COVID-19 has disrupted life for frequent travelers more than infrequent travelers.

Overall, how much if at all has your life been disrupted by the coronavirus (COVID-19) – A: A lot



* Among frequent and infrequent travelers identified in our survey.

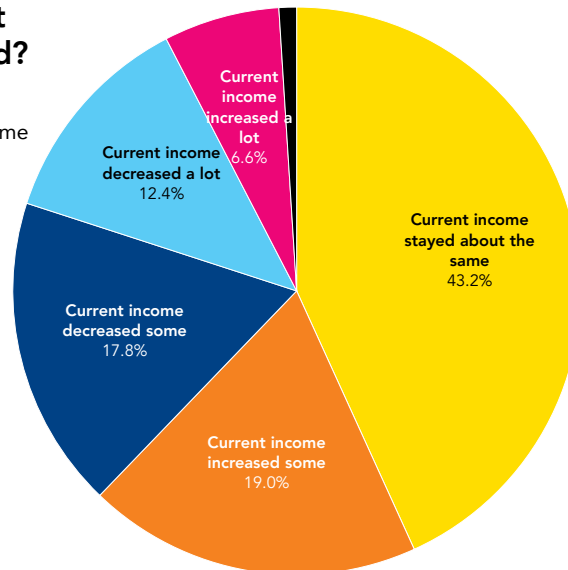
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.



Over 82% of U.S. frequent travelers who traditionally travel during the summer months plan to travel this coming summer.

Compared to the end of 2019, how has your current household income changed?

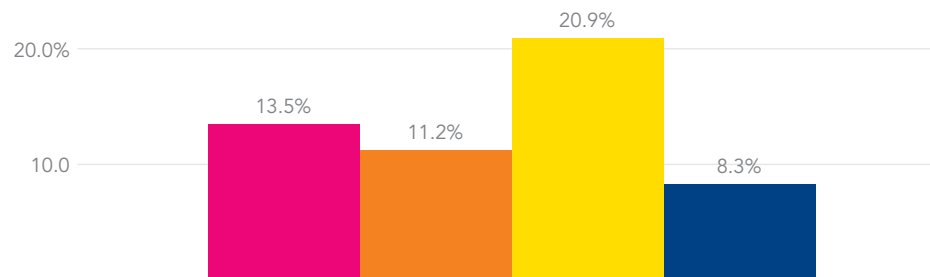
- Current income stayed about the same
- Current income decreased some
- Current income increased a lot
- Current income increased some
- Current income decreased a lot
- Prefer not to answer



* Among frequent travelers identified in our survey.
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Since the beginning of the coronavirus, has your employer done any of the following?

- Laid you off permanently or involuntarily terminated you
- Furloughed or temporarily laid you off
- Reduced your work hours
- Salary or hourly rate reduced



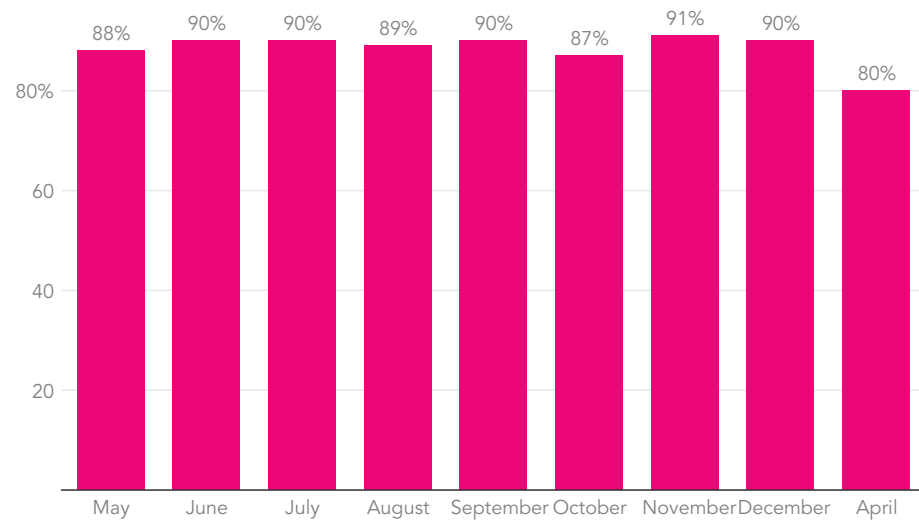
* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.



How important do you think it is for people like you to stay three to six feet away from others in order to stop the spread of the coronavirus?

80% of frequent travelers report in April that they believe it is “somewhat important” or “very important” to stay three to six feet away from others to “stop the spread of the coronavirus,” down from an 90% in December.

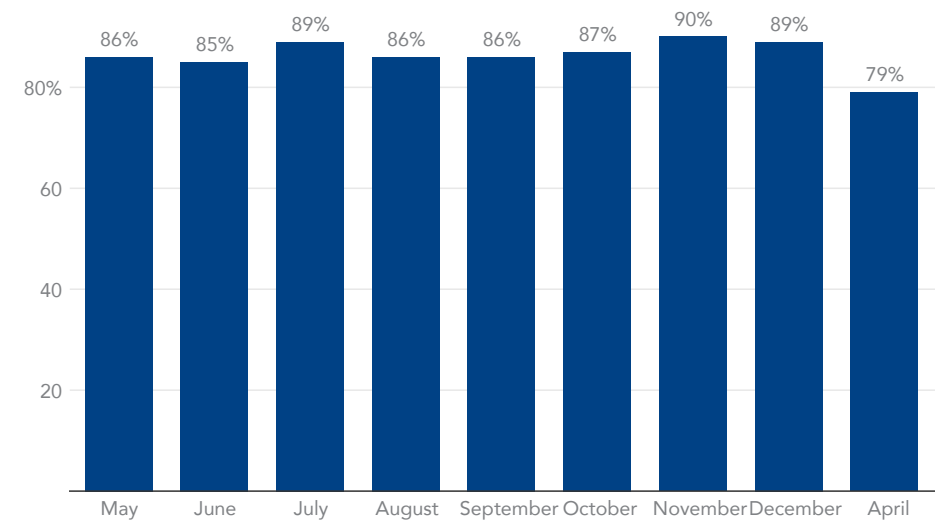


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

How important do you think it is for people like you to wear a face mask in order to stop the spread of the coronavirus?

79% of frequent travelers report in April that they believe it is “somewhat important” or “very important” to wear a face mask to “stop the spread of the coronavirus,” down from 89% in December.



* Among frequent travelers identified in our survey.

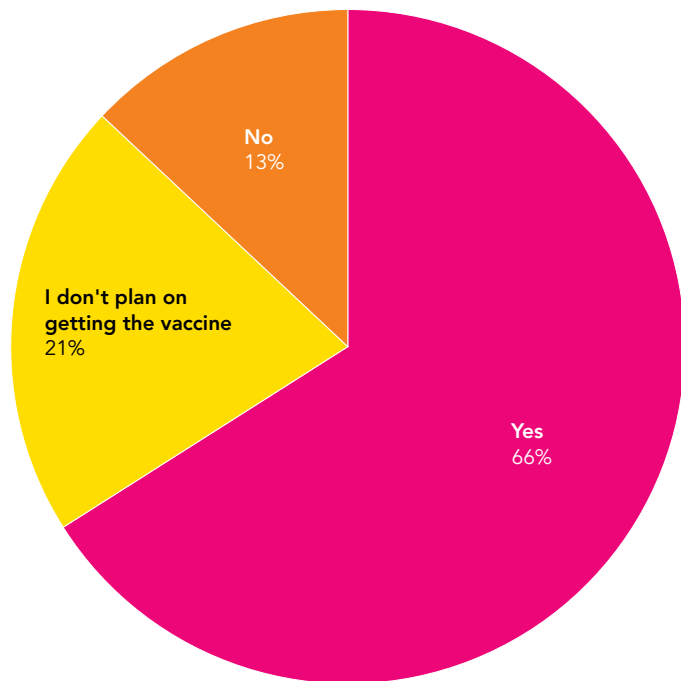
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.



Frequent travelers are showing clear signs of motivation to return to a more normal way of life. They are significantly more likely to have received a COVID-19 vaccine than infrequent travelers and are much more likely to have done so earlier, leading to a greater percentage who have also received their completed vaccine series.

Do you (or will you) adhere to distancing once vaccinated for COVID-19?

■ Yes ■ I don't plan on getting the vaccine ■ No

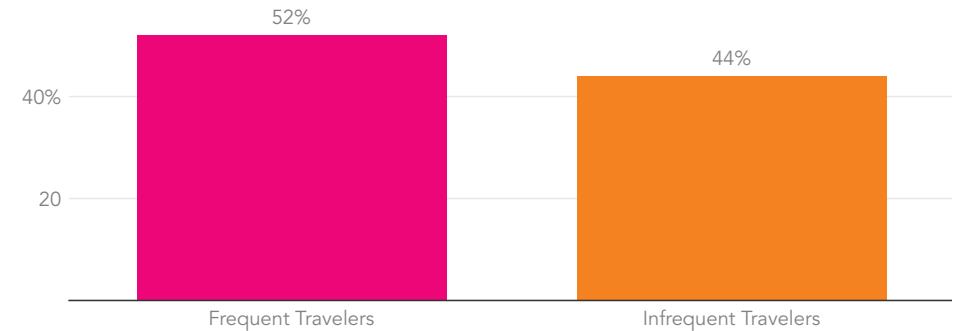


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Frequent travelers are more vaccinated than infrequent travelers.

Have you received a COVID-19 vaccine?

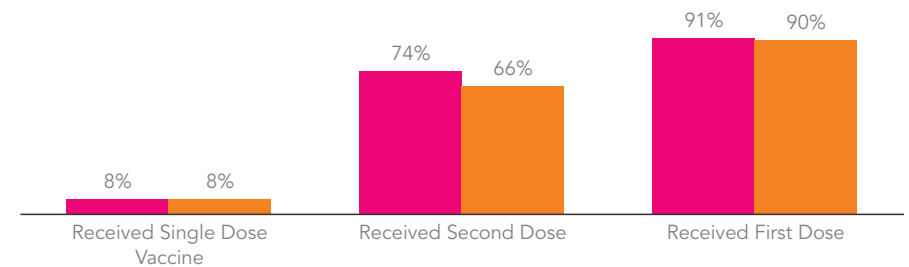


* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Among vaccinated travelers, frequent travelers are more likely to have completed their vaccine series.

■ Frequent Travelers ■ Infrequent Travelers



* Among frequent and infrequent travelers identified in our survey.

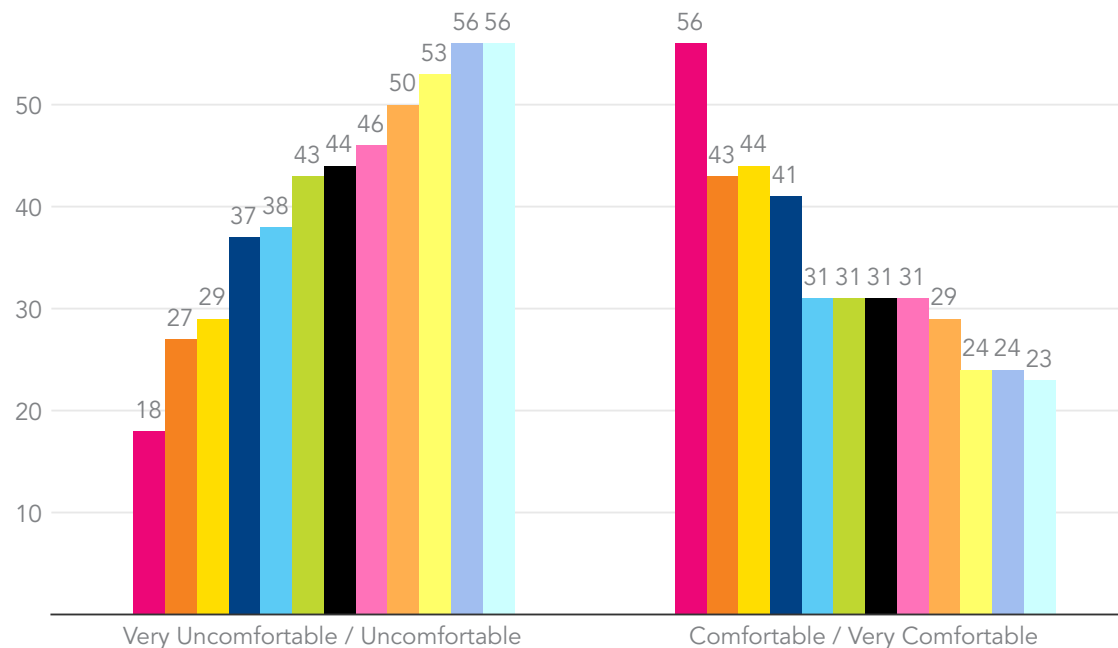
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Frequent travelers' comfort with travel today to a variety of destinations is highly variable. In general, they are more comfortable with domestic destinations than international travel. In addition, they are generally more comfortable traveling to destinations that have not been in the news for large COVID outbreaks than to those that have.

Destination "Comfort Index" – April 2021

As COVID-19 infection rates currently stand, rate your level of comfort with travel to these destinations:

■ U.S. Domestic ■ Southwest (AZ, NM, CO, UT, NV) ■ Large U.S. Cities ■ Florida ■ Caribbean
■ Las Vegas ■ U.S. Virgin Islands ■ California ■ New York ■ Puerto Rico ■ Europe
■ Mexico



* Among frequent travelers identified in our survey.

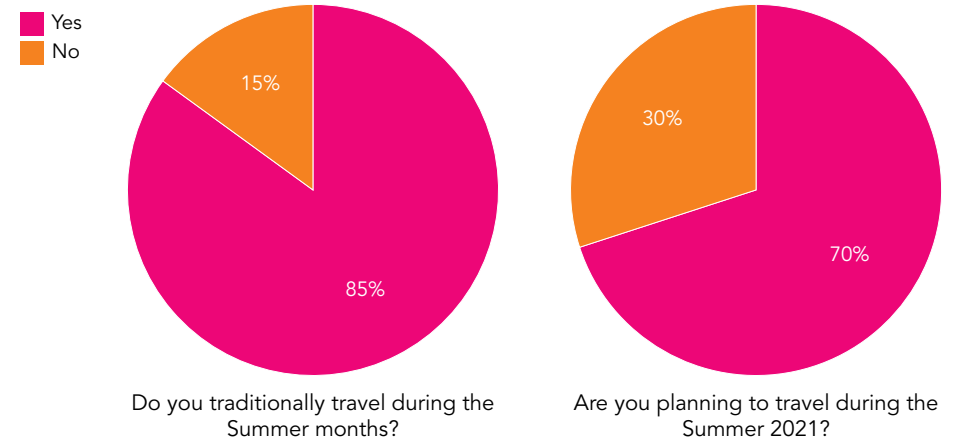
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.





We asked frequent travelers a series of questions regarding travel behaviors during peak travel periods before the pandemic, how their travel plans evolved during these periods in 2020, and how they are thinking about travel during these windows in the year ahead. The results showed strong demand for summer travel and sequential improvements in rates of planned travel during peak travel windows as the year goes on.

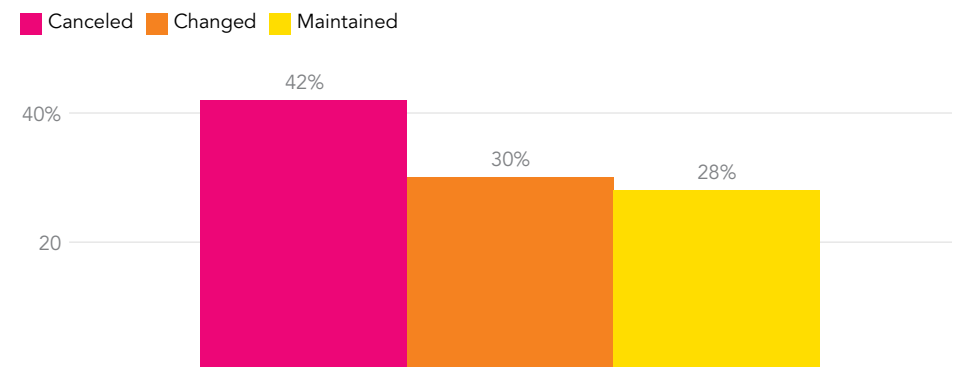
Summer travel



* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

In 2020 did you cancel, change, or maintain your summer travel plans?

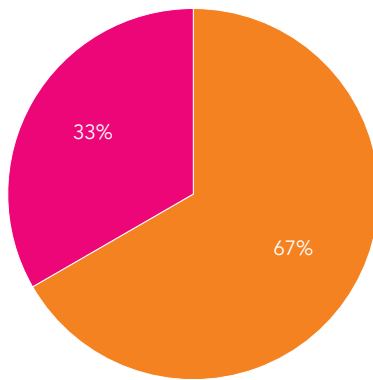


* Among frequent travelers identified in our survey.

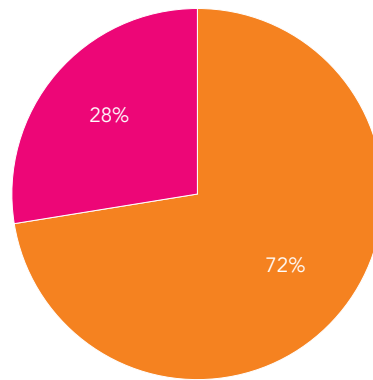
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Labor Day travel

■ No
■ Yes



Do you traditionally travel during the Labor Day holiday weekend?



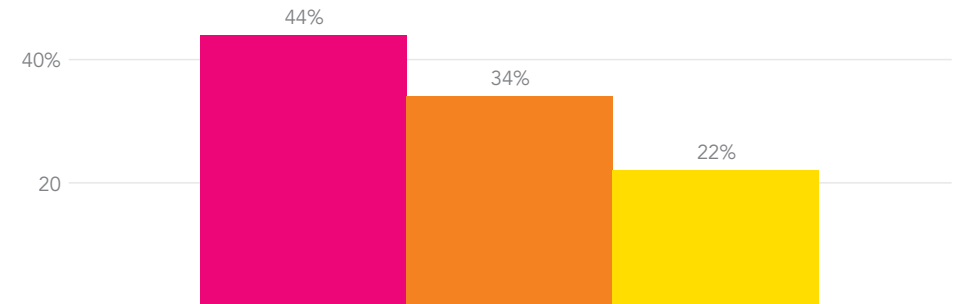
Are you planning to travel during the 2021 Labor Day holiday weekend?

* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

In 2020 did you cancel, change, or maintain your Labor Day holiday weekend travel plans?

■ Canceled
■ Changed
■ Maintained

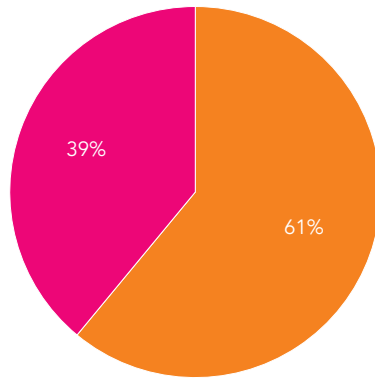


* Among frequent travelers identified in our survey.

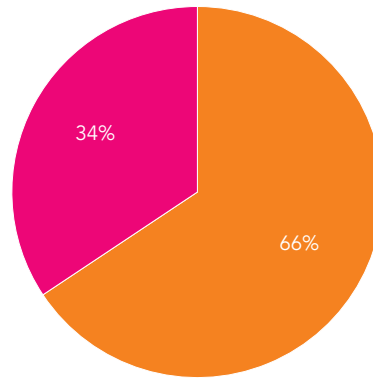
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Thanksgiving travel

No
Yes



Do you traditionally travel during the Thanksgiving holiday?



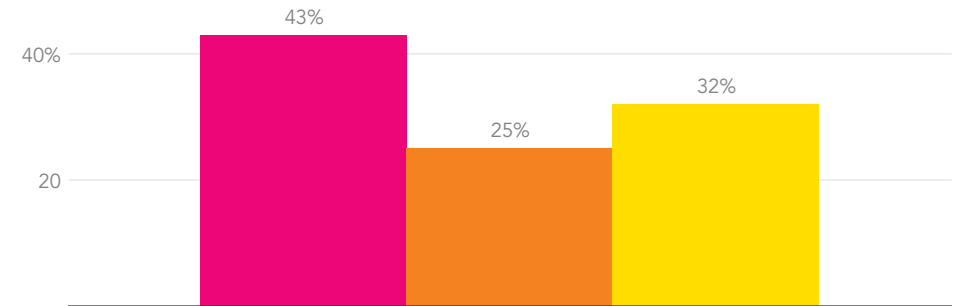
Are you planning to travel during the 2021 Thanksgiving holiday?

* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

In 2020 did you cancel, change, or maintain your Thanksgiving holiday travel plans?

Canceled Changed Maintained

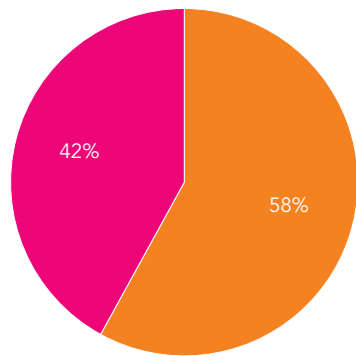


* Among frequent travelers identified in our survey.

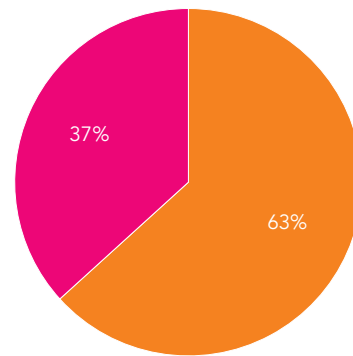
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

December holidays travel

■ No
■ Yes



Do you traditionally travel during the December religious holidays?



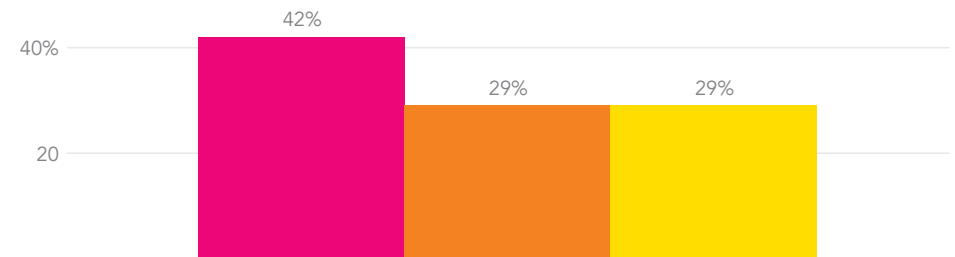
Are you planning to travel during the 2021 December religious holidays?

* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

In 2020 did you cancel, change, or maintain your travel plans during the December religious holidays?

■ Canceled ■ Changed ■ Maintained



* Among frequent travelers identified in our survey.

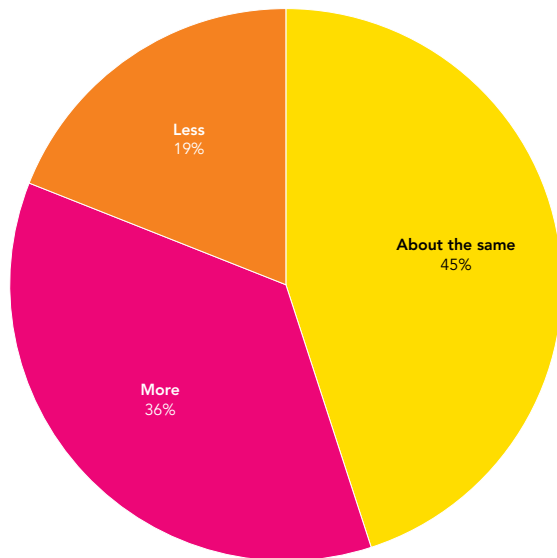
Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.



As frequent travelers think to the future, a clear majority plan to travel in similar amounts or more than they did before the pandemic, with 36% reporting that they plan to travel more. In addition, more plan to spend more on future travel than those who plan to spend less.

As you think about the next three years, do you think you will travel for pleasure more, travel less or travel about the same as you did before the pandemic?

■ About the same ■ More ■ Less

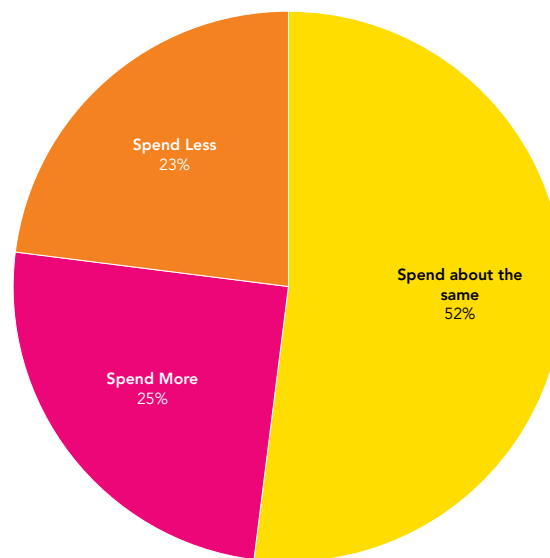


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

As you think about upcoming leisure travel, do you intend to spend more, spend less, or spend the same as previous trips?

■ Spend about the same ■ Spend More ■ Spend Less

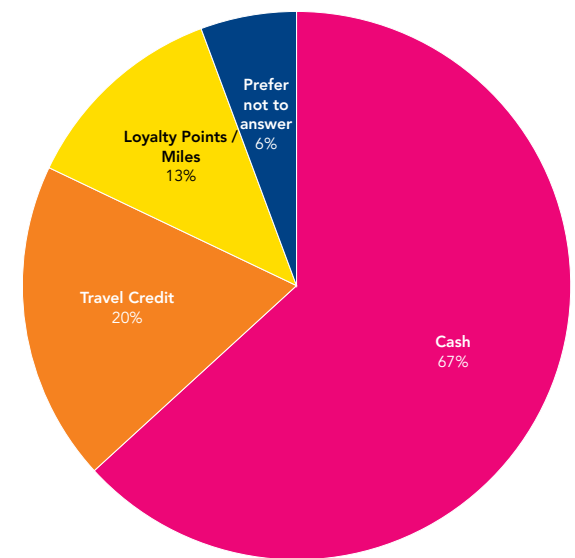


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

How do you plan to pay for your next leisure trip/vacation?

■ Cash ■ Travel Credit ■ Loyalty Points / Miles ■ Prefer not to answer

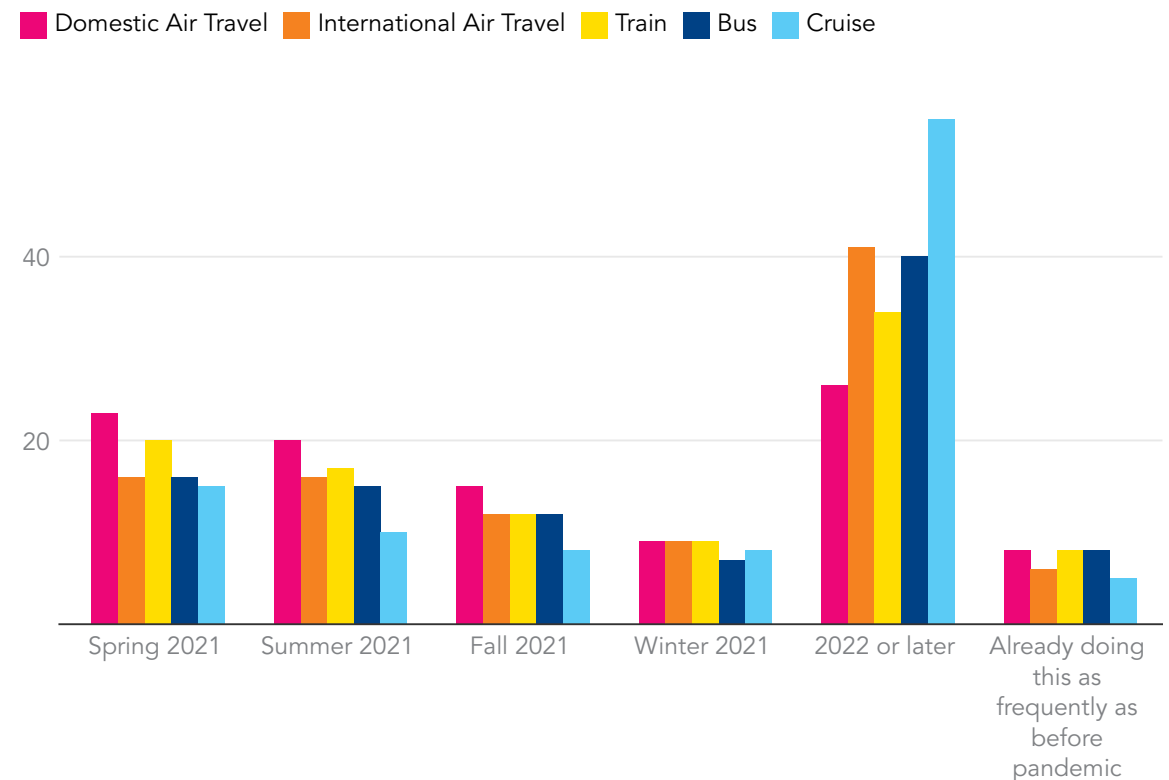


* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

While the data captured in this research paints a cheerful picture of the year ahead for travel industry recovery, there are still large numbers of frequent travelers who report that they will be unwilling to resume travel at pre-pandemic levels until 2022 or later. This is particularly true for cruise travel, where over 50% of frequent travelers don't plan to resume that mode of travel until 2022 or later.

When do you think you would be willing to start doing each of the following as frequently as before the pandemic?



* Among frequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22.

Few markets have more acutely felt the sting of the pandemic as the travel and hospitality space. But few industries are as deeply loved by—and personal for—those consumers who engage with it frequently. Our survey shows a frequent traveler population that has been highly impacted by the economic disruption caused by the pandemic and by the changes it has caused to all our day-to-day lives.

There is a silver lining, however: frequent travelers are itching to get back on the road after a 2020 of canceled

and delayed plans and traditions. They are optimistic, following public health guidance, and planning for a return to travel (and even more travel than before) in the years ahead.

We will be refreshing our survey during the summer with an eye towards tracking evolving frequent traveler thinking as the national vaccine rollout progresses and more states and municipalities update COVID restrictions.

For more information, contact:

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ICF Next is a new breed: a consulting agency. We combine the deep creative capabilities that clients expect from a world-class agency with the expertise they require to navigate complex and business-defining milestones. Our team of mission driven strategists, marketers, technologists, and data scientists works every day to build experiences that deliver active participation from the people who most influence change for our clients. Our holistic approach to communications and marketing ensures we are moving customers and colleagues from a state of passive engagement to long-term brand loyalty, advocacy, and shared identity.

All graphs in this report are built using Datawrapper

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