



ICF next+

Travel and tourism recovery report



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

Introduction 3

Approach and methodology. 4

Confidence. 5

Financial and employment impact. 7

Public health measures. 8

Frequent traveler vaccinations. 9

Labor Day travel12

Thanksgiving travel13

December holidays travel14

Spring Break 2022 travel.15

Future travel16

Closing thoughts.18



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. We have added questions to understand how individuals' personal finances and employment status have been impacted, along with media consumption habits, demographics, and adherence to evolving coronavirus guidance in conjunction with the rise of the Delta variant.

In this second refresh of our COVID-19 Monitor Survey in 2021, 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, and responses to continued vaccination efforts and changing public health measures—particularly pertinent as the more transmissible Delta variant ripped through the United States in the summer months.

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 include:

- Frequent travelers continue to have a high degree of confidence in travel brands' capabilities to respond to the pandemic.
- Frequent travelers have seen increases in household income.
- Frequent travelers and infrequent travelers are reporting similar levels of vaccination rates and completions.
- Frequent travelers' comfort with travel today varies widely from destination to destination.
- Frequent travelers report a resumption of pre-pandemic travel as early as 2021 and are planning big returns to travel in 2022 and beyond.



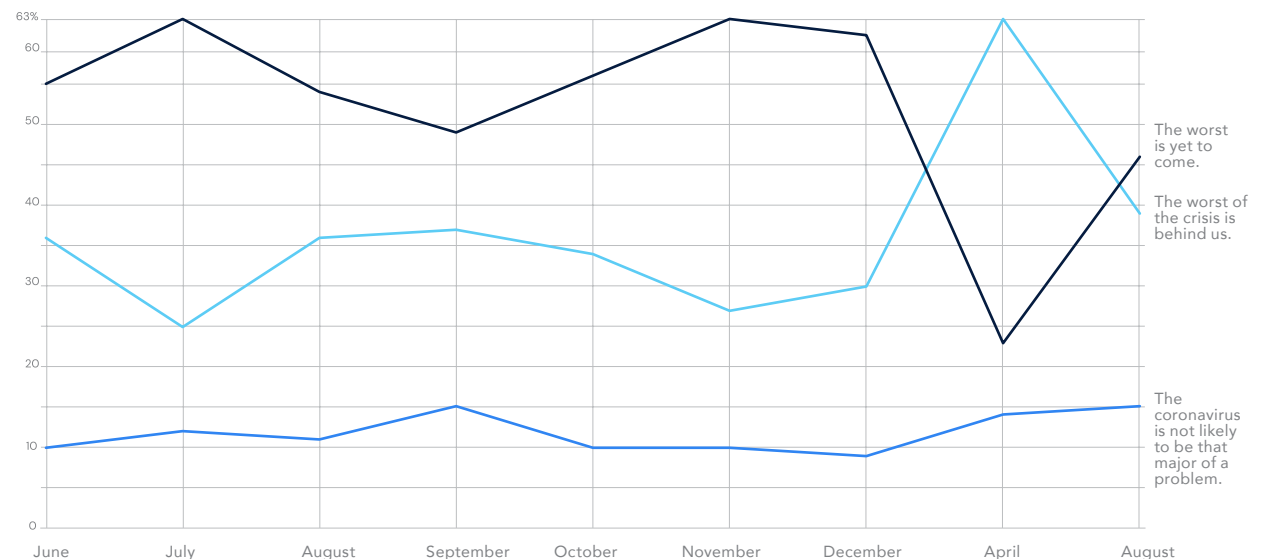
- Respondents were drawn from a national, mobile, nonprobability panel of 2.5 million people in the U.S.
- The initial invitation for each survey was sent by app notification via cell phone to a census-balanced (age, gender, and race) sample of approximately 3,000 adult panel members each month.
- Three 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.

Our latest survey findings show that frequent travelers’ attitudes regarding the course of the pandemic has shifted significantly from our April responses. Nearly half (45.7%) of frequent travelers now believe that the “worst of the crisis is yet to come,” up from 23% in April. Frequent travelers who believe that “the worst of the crisis is behind us” dropped 23%, from 62% in April to only 39% in August/September.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22 and August 23 - September 1.

Frequent traveler attitudes about the pandemic tracked 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?



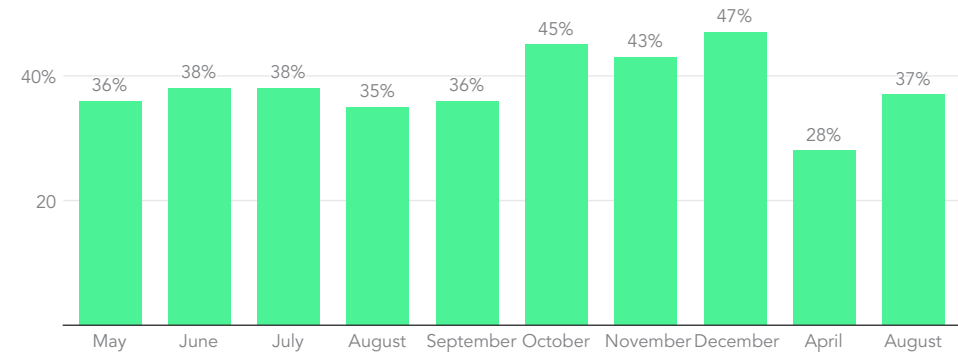


As the nation continues to feel the impact of the pandemic, with a surge in cases and hospitalizations due to the Delta variant, frequent travelers' belief that they will personally get sick with COVID-19 has ticked up to levels not seen since May and June of 2020.

A clear majority of frequent travelers continue to have "a great deal" of confidence or "a fair amount" of confidence in hotel and airline brands to deal with the ongoing pandemic, while around one-third of travelers remain doubtful of the ability of organizations in these categories to appropriately adapt to new concerns and safety measures.

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

37% of frequent travelers in August feel that it is "somewhat likely" or "very likely" that they will get sick with coronavirus, up from 28% in April.



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

Airlines



Hotels



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

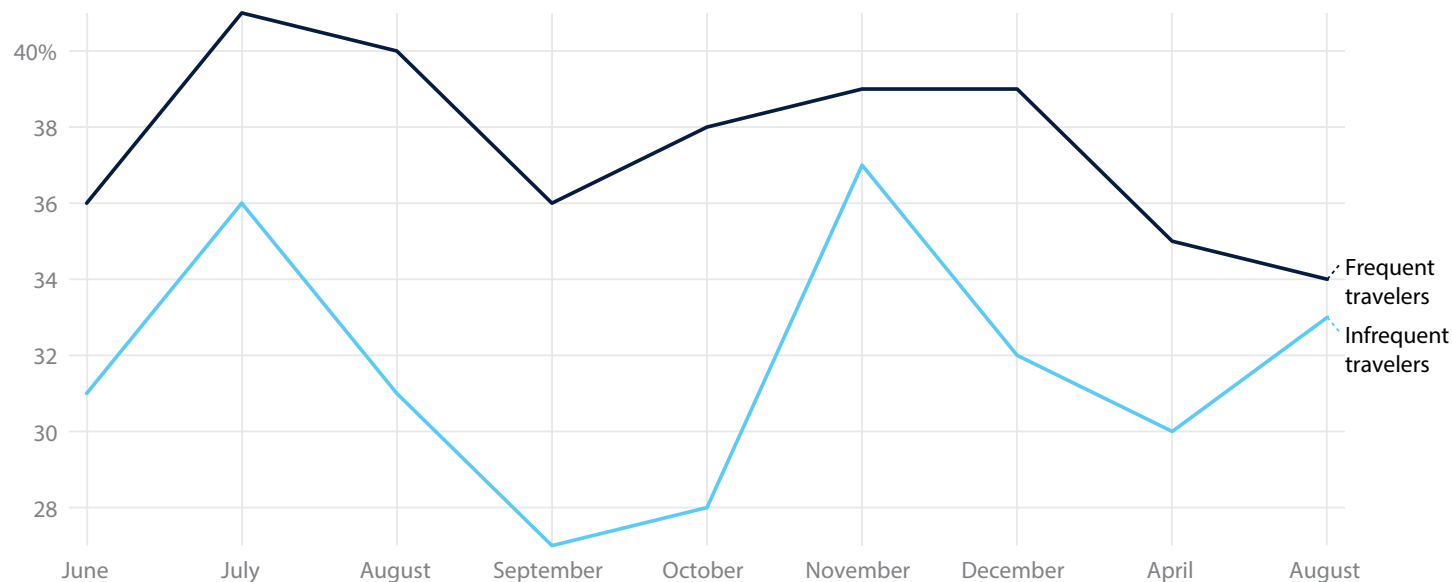
* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22 and August 23 - September 1.

In our August/September findings, frequent travelers report that the pandemic has disrupted their lives more than infrequent travelers, even at this stage of the crisis. 94% of frequent travelers reported the crisis disrupting their lives, with 35% reporting it disrupting their lives “a lot”. Similar percentages across the two groups report decreased income or work and or salary reductions than respondents to our general consumer survey, with frequent travelers faring slightly better across the board.

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

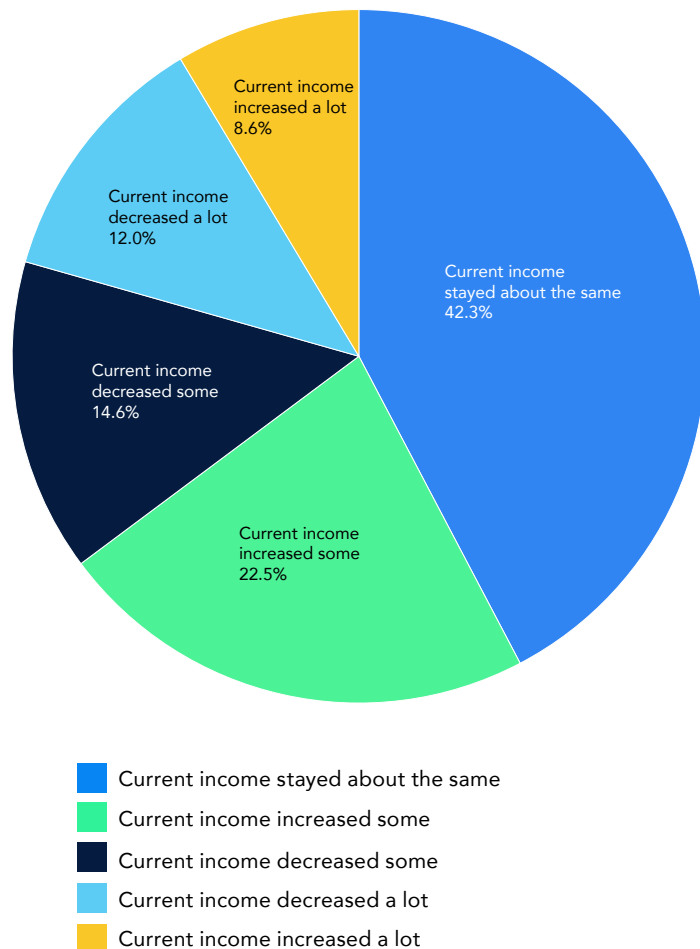
Overall, how much if at all has your life been disrupted by the Coronavirus (COVID-19)? - a lot"



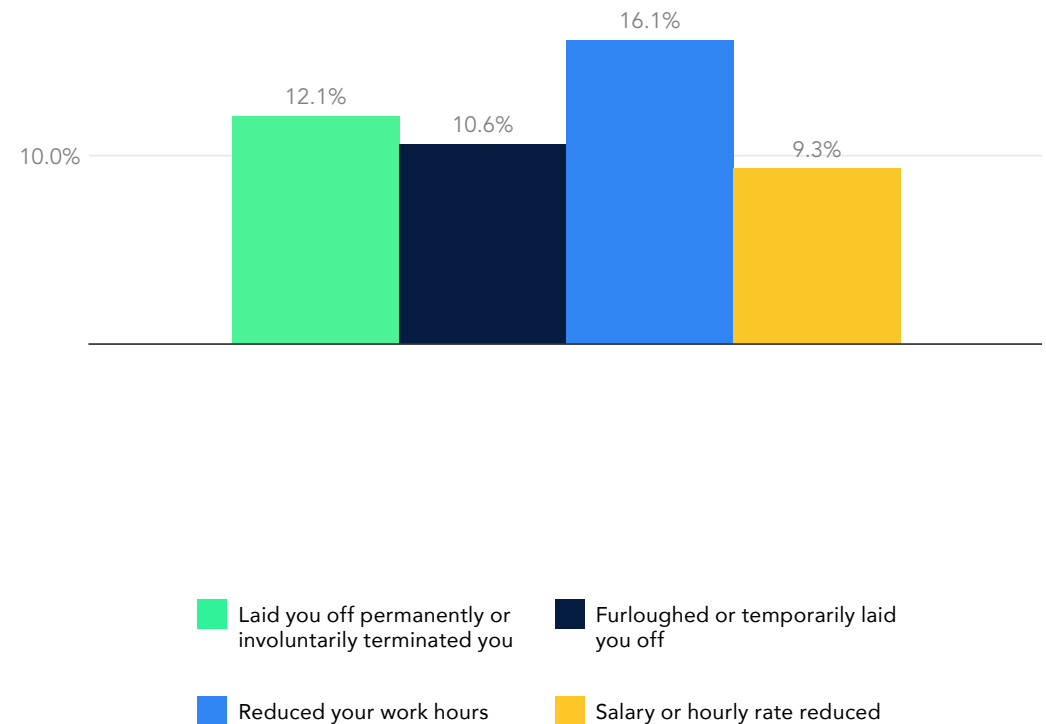
* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample April 15 - April 22 and August 23 - September 1.

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



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

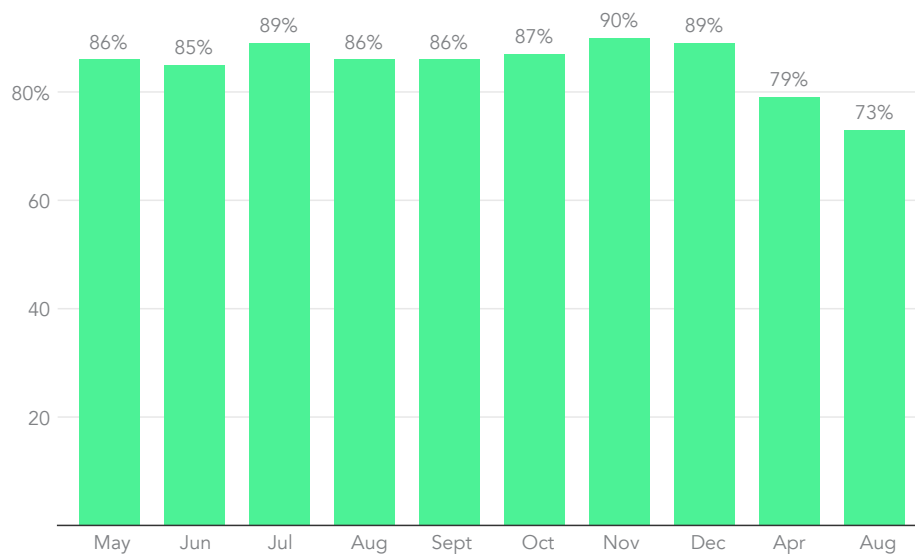


* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

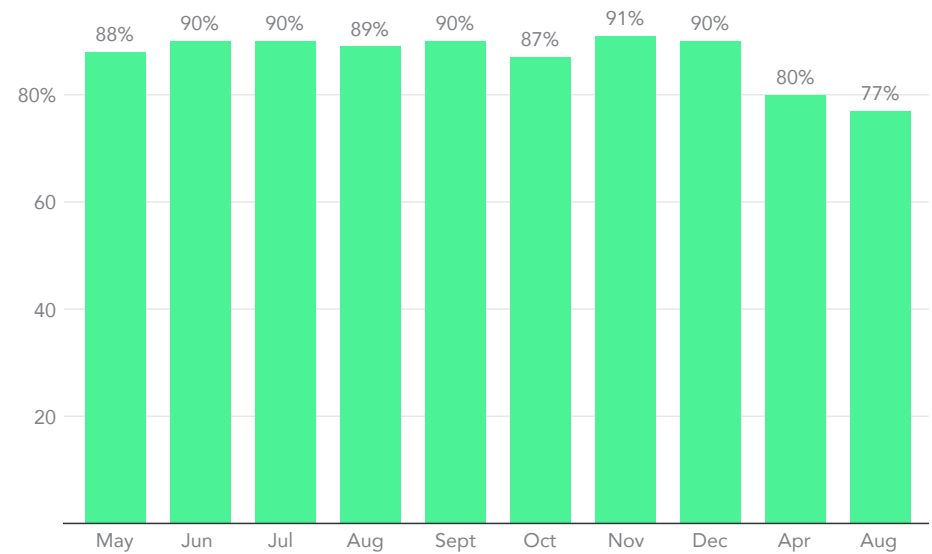
How important do you think it is for people like you to wear a face mask in order to stop the spread of the coronavirus?

73% of frequent travelers report in August that they believe it is “somewhat important” or “very important” to wear a face mask to “stop the spread of the coronavirus,” down from 79% in April.



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?

77% of frequent travelers report in August 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 80% in April.



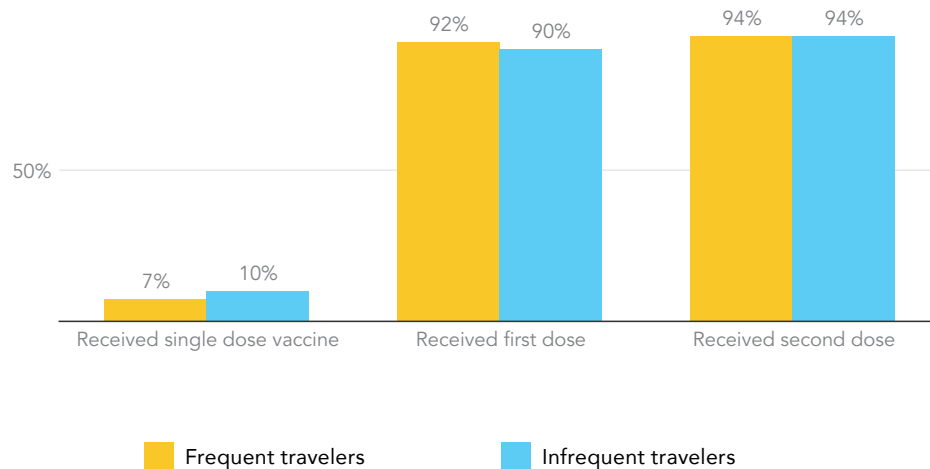
* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 -September 1.



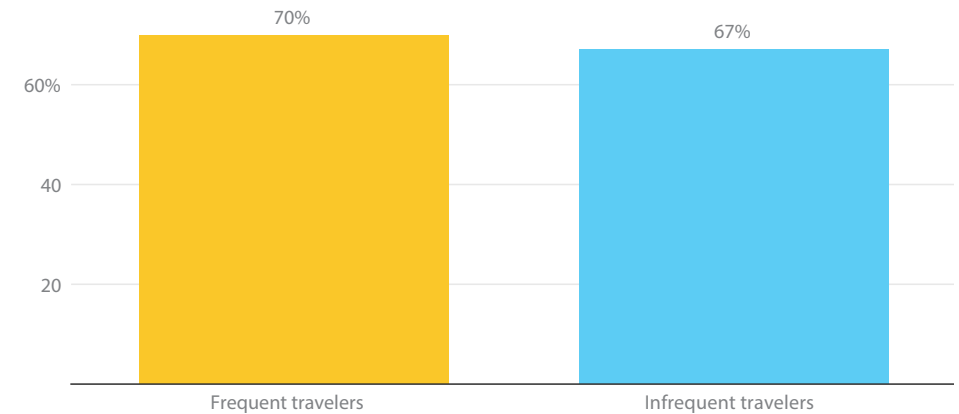
While frequent travelers reported more likelihood to have received their COVID-19 vaccines in April—in terms of early and completed vaccination rates—than infrequent travelers, both groups reported similar percentages of vaccination rates in August/September. This suggests that, irrespective of travel frequency, both groups are eager to return to a more normal way of life across the board.

Among vaccinated travelers, vaccine completion rates are similar.



Vaccine rates among travelers are similar

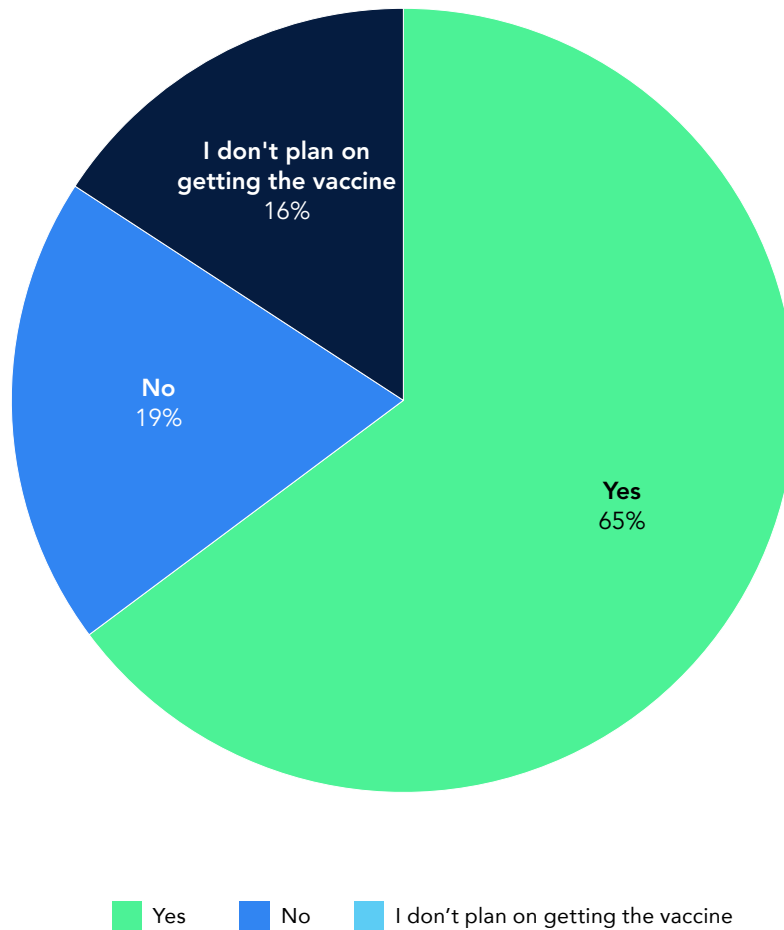
Have you received a COVID-19 vaccine?



* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

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



* Among frequent and infrequent travelers identified in our survey.

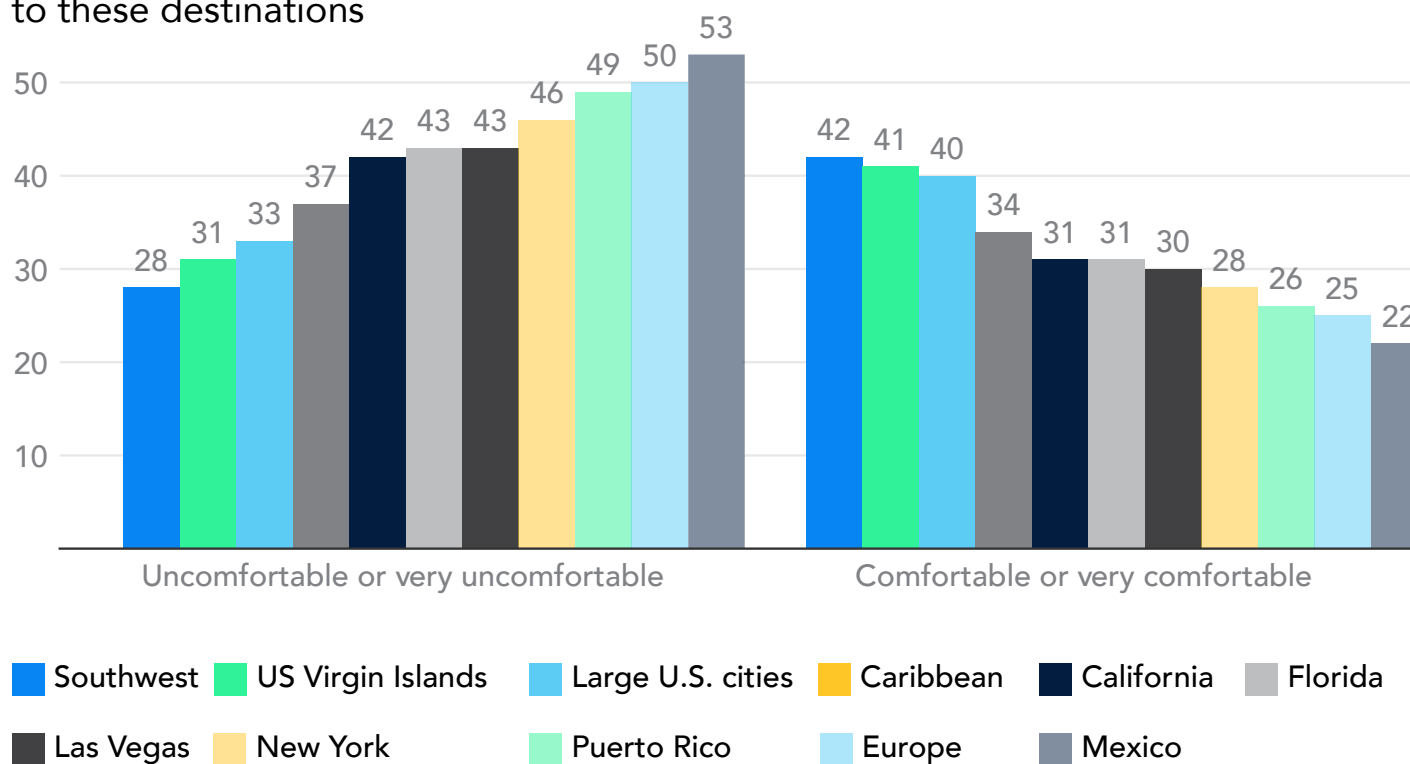
Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.



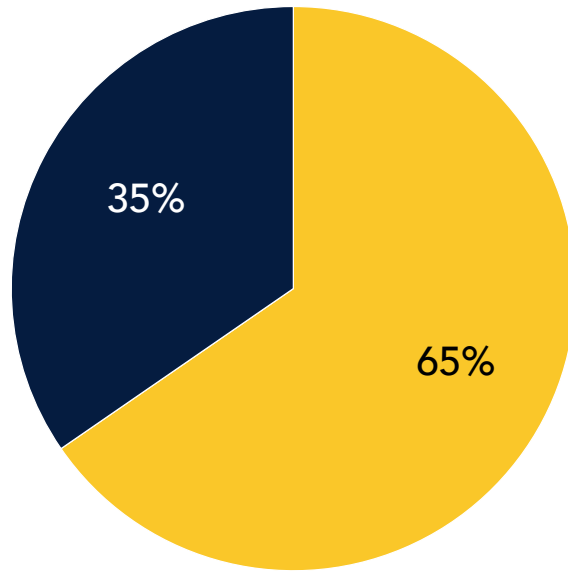
Frequent travelers' comfort with travel today to a variety of destinations continues to be highly variable. And consistent with our April findings, frequent travelers are more comfortable with domestic destinations than international travel more than four months out and despite higher levels of the population fully vaccinated. And destinations that received media attention for large COVID-19 outbreaks—past or present—continue to show lower levels on the "Comfort Index" for frequent travelers, despite changes in case loads or surges.

Destination "Comfort Index" - August 2021

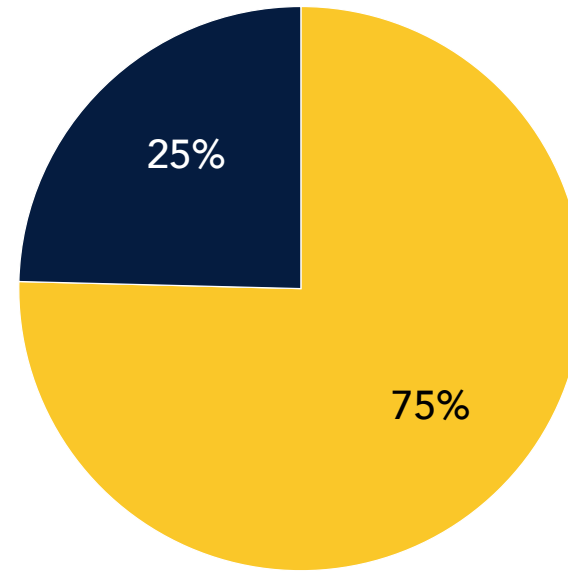
As COVID-19 infection rates currently stand, rate your level of comfort with travel to these destinations



* Among frequent and infrequent travelers identified in our survey.



Do you traditionally travel during the Labor Day holiday weekend?

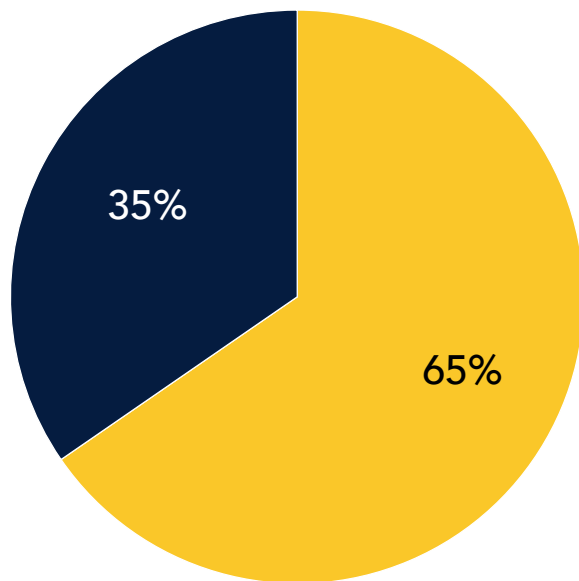


Are you planning to travel during the 2021 Labor Day holiday weekend?

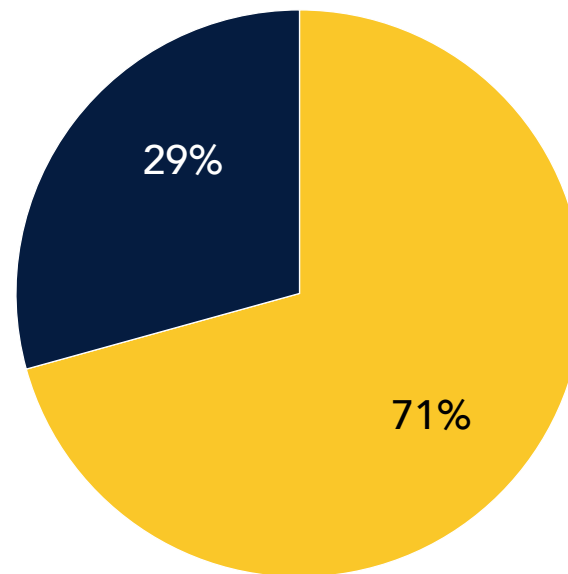
■ Yes ■ No

* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.



Do you traditionally travel during the Thanksgiving holiday?

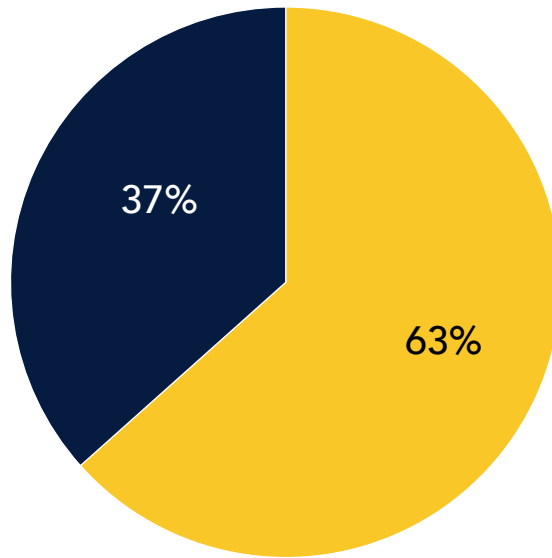


Are you planning to travel during the 2021 Thanksgiving holiday?

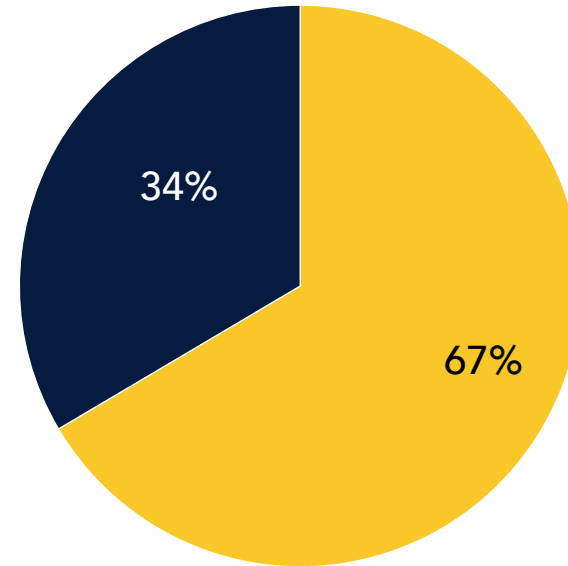
■ Yes ■ No

* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.



Do you traditionally travel during the December religious holidays?



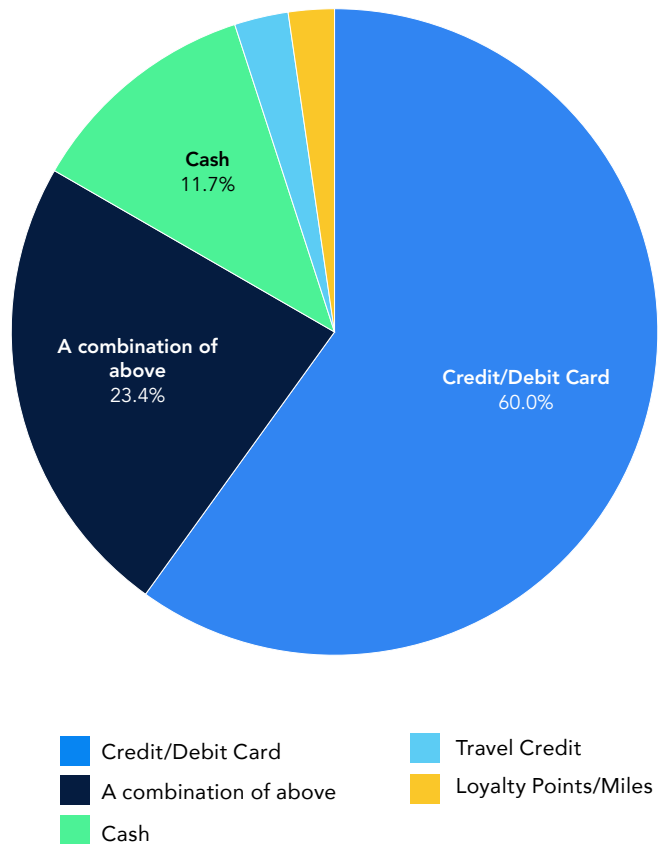
Are you planning to travel during the 2021 December religious holidays?

■ Yes ■ No

* Among frequent and infrequent travelers identified in our survey.

Sources: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

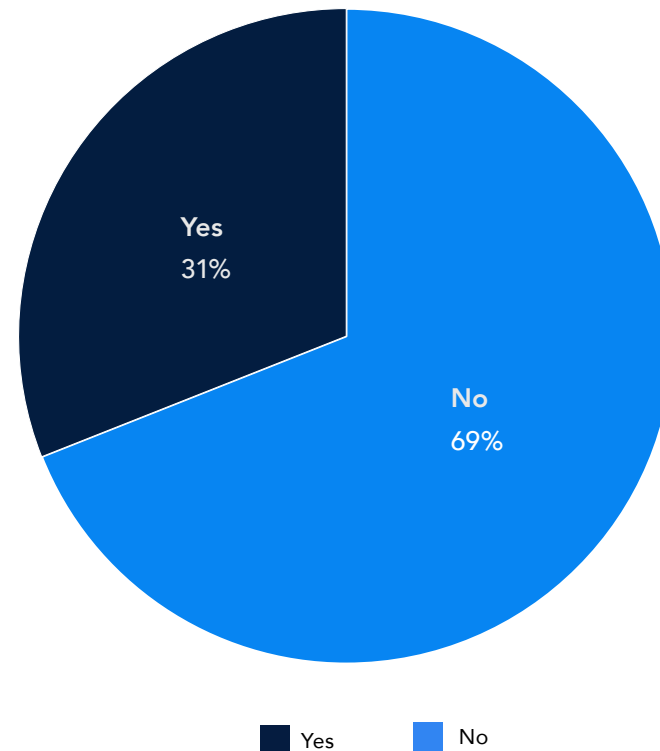
How do you plan to primarily pay for your next leisure trip/vacation?



* 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.

Are you planning to travel during the 2022 Spring Break?



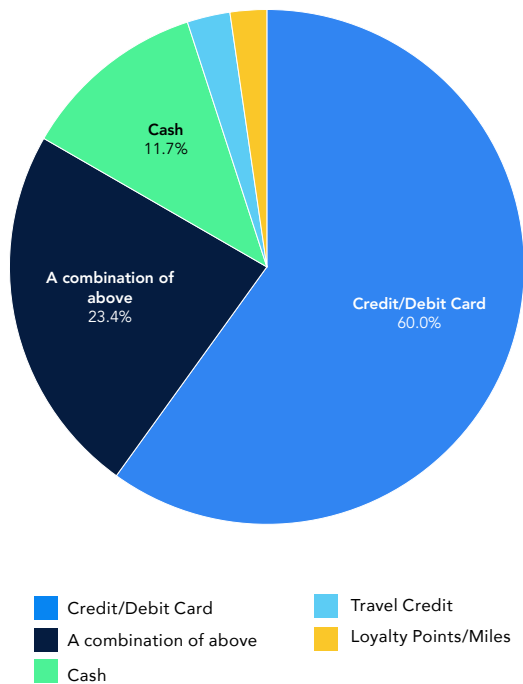
* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.



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 just less than a third (30%) reporting that they plan to travel more. And a quarter of frequent travelers' plan to spend more on future travel versus 19% who plan to spend less.

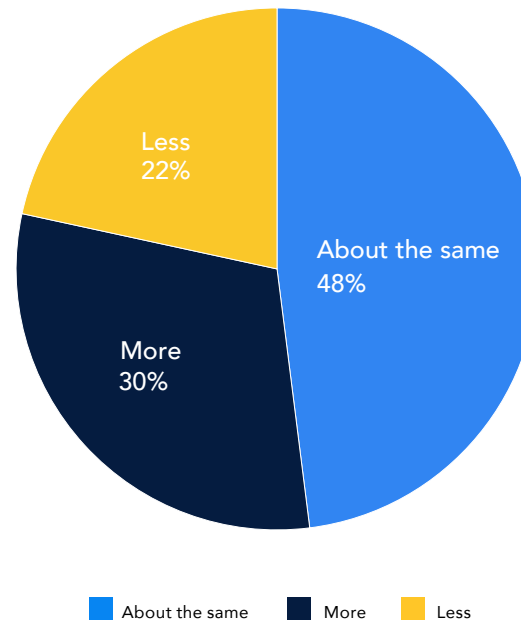
How do you plan to primarily pay for your next leisure trip/vacation?



* 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.

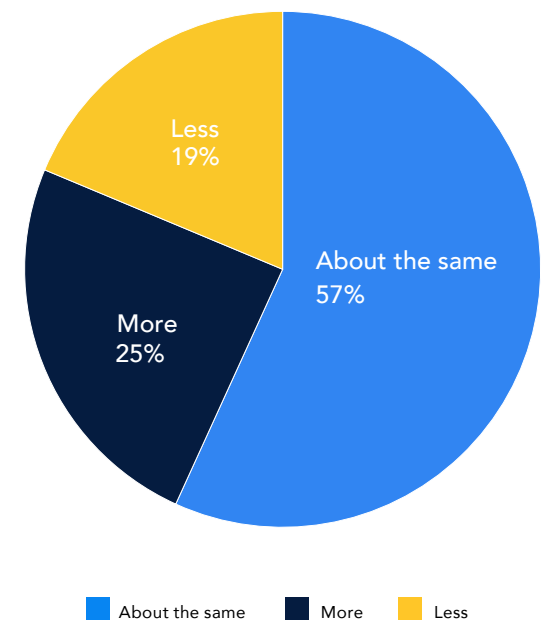
As you think about the next three years, do you think you will travel for pleasure more, travel less or travel about the same as you did before the pandemic?



* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

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

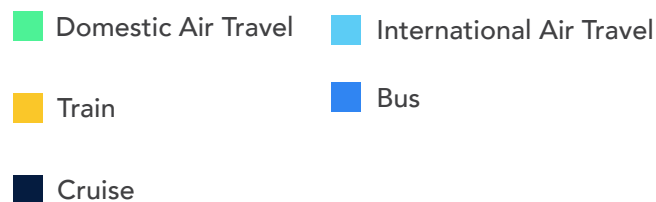


* Among frequent and infrequent travelers identified in our survey.

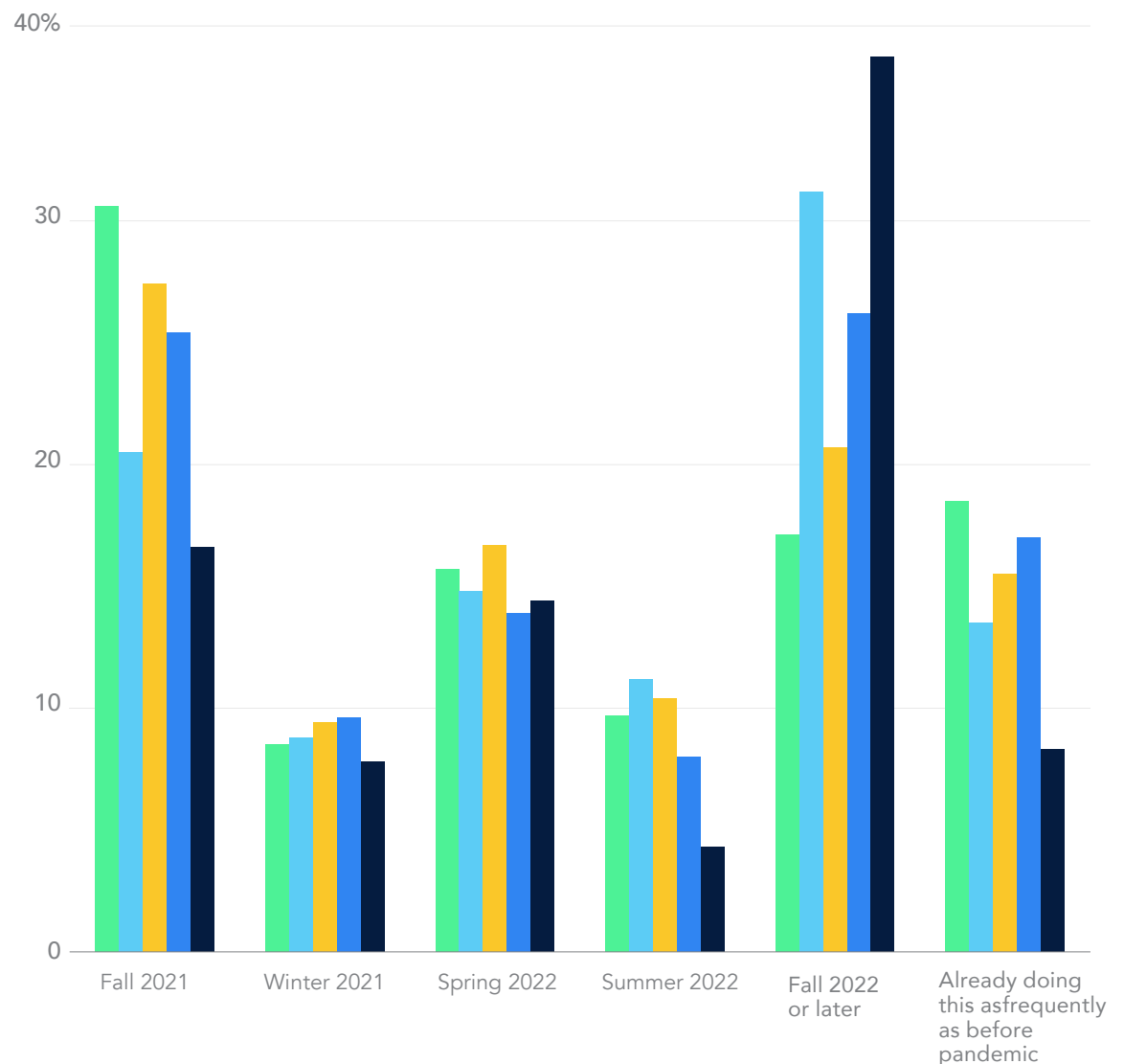
Source: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

The data captured in this report portrays a seemingly plateau for frequent traveler sentiment since April. But across most modes of travel—except for cruises—frequent travelers reported a fair amount of consistency in their willingness to resume pre-pandemic levels of travel by fall 2021. And significantly higher percentages of frequent travelers reported that they are already traveling as much as they were pre-pandemic, compared to April.

That said, a significant percentage of frequent travelers across all modes of travel don't plan to resume until fall 2022 or later—with cruises being the highest at 37%.



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



* Among frequent and infrequent travelers identified in our survey.

Source: ICF Next analysis using MFour data collected from a nationwide sample August 23 - September 1.

The glimmer of hope that the travel and hospitality industries saw in the early summer of 2021 was quickly, and unfortunately, shrouded by the COVID-19 Delta variant. While other industries have benefited from some semblance of normalcy, the travel industry continues to grapple with the ongoing impacts of the pandemic.

While our findings in April showed that frequent travelers—versus infrequent travelers—were more eager and ready to get vaccinated, maintain social distance, and head to the airport in the then-near-future. Our August/September findings show a leveling

off between the two groups—in everything from vaccination rates, comfort level, confidence in companies' handling of the crisis, and financial impacts.

Despite those findings, however, frequent travelers continue to show a strong desire to travel more and spend more once the pandemic subsides—nearly a third and a quarter, respectively. That suggests while the itch persists for frequent travelers—and indeed some are already scratching—all travelers are quite literally waiting in the wings to resume pre-pandemic levels of movement, hopefully, longingly waiting for the skies to clear.

For more information, contact:

hello@icfnext.com

[LINKEDIN.COM/ICF-NEXT](https://www.linkedin.com/company/icfnext)

[@ICFNEXT](https://twitter.com/ICFNEXT)

[FACEBOOK.COM/ICF-NEXT](https://www.facebook.com/icfnext)

About ICF Next

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

Any views or opinions expressed in this report are strictly those of the author(s) + do not necessarily represent those of ICF. This report is provided for informational purposes only + the contents are subject to change without notice. No contracted obligations are formed directly or indirectly by this document. ICF MAKES NO WARRANTIES, EXPRESS; IMPLIED, OR STATUTORY AS TO THE INFORMATION IN THIS DOCUMENT.

No part of this document may be reproduced or transmitted in any form, or by any means for any purpose without prior written permission.

ICF NEXT + ICF INTERNATIONAL are registered trademarks of ICF and/or its affiliates. Other names may be trademarks of their respective owners.