

Travel Again

**Traveler Confidence Index
USA Edition
April 2021**



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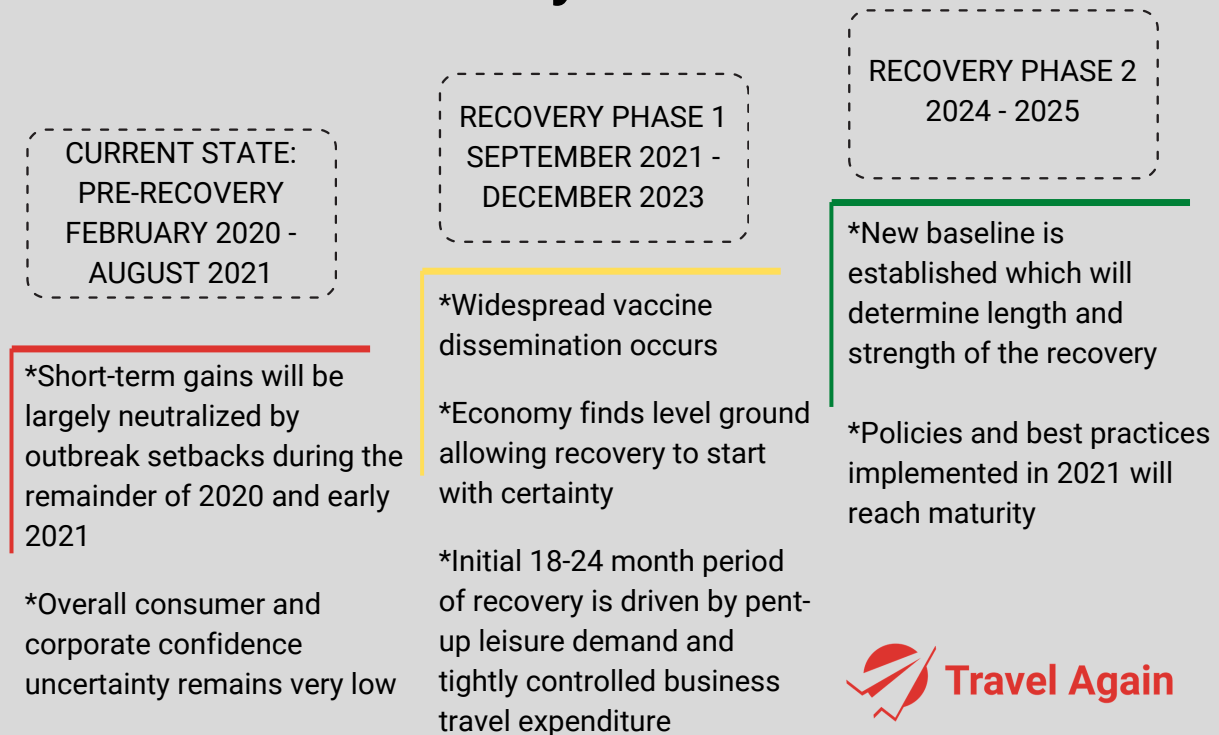
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Introduction

Decimated by the 2020 global pandemic, the travel industry is suffering a record economic setback. In order to recover, the marketplace participants are working to adapt to the immediate crisis until the long road to recovery can begin.

The key to that long-term recovery is rebuilding consumer and corporate confidence in traveling again. This initially hinges on the timelines for the development and widespread dissemination of COVID-19 vaccines. However, sharing best practices globally and instituting responsible government policy is equally, if not more important to impacting successful outcomes over the next 3+ years.

Phases of Recovery



Rebuilding the travel industry is a key driver in rebuilding our global economy. Therefore, the effort to prepare for and implement a coordinated global campaign for the recovery of the travel industry must begin now. Travel Again released the Global Travel Recovery Framework - a robust plan that provides a framework for safely rebuilding the travel industry, along with specific priorities and recommendations. Learn more: travelagainproject.org/global-framework

This index has been developed to measure traveler confidence for both the business and leisure traveler. This will guide the prioritization of future travel industry initiatives by measuring the impact on traveler confidence.



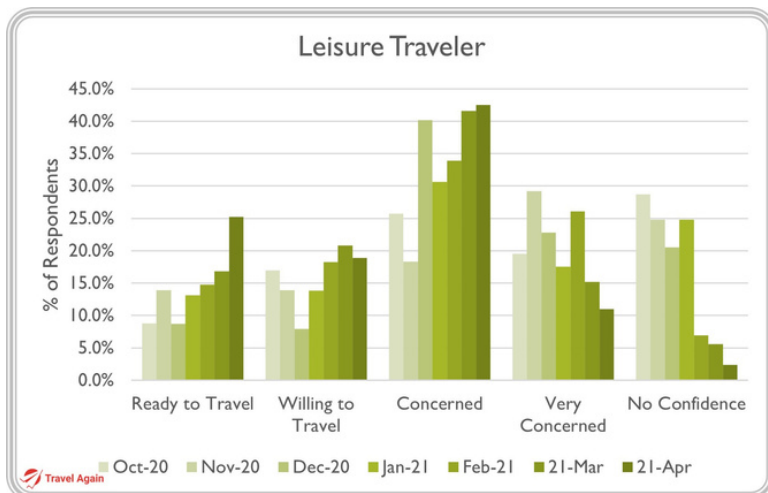
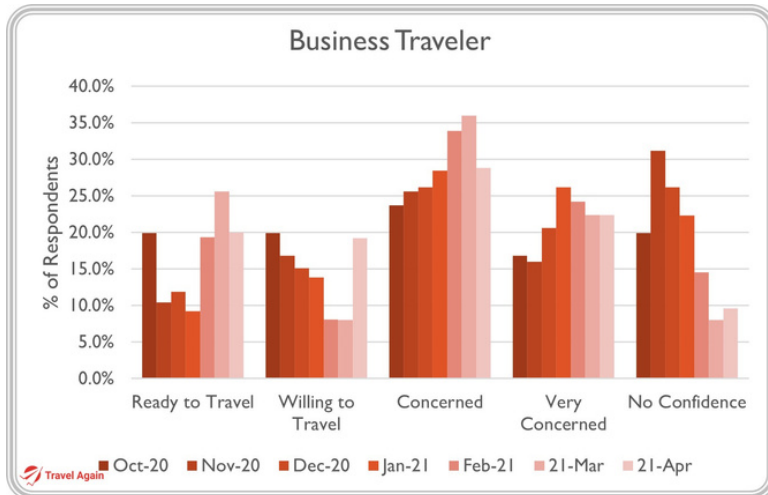
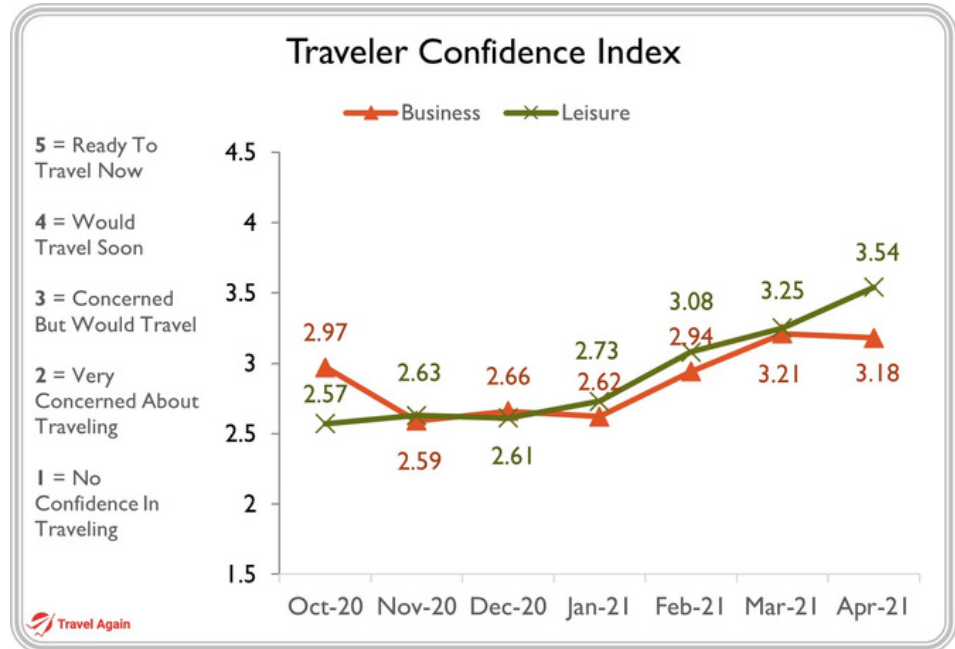
Key Takeaways

Key takeaways from this study are:

- On April 30, the Transportation Security Administration (TSA) announced the extension of the federal mask mandate on planes, in airports and on public transportation through September 13, 2021.
 - The vast majority of travelers support this extension with 78% of leisure travelers and 77% of business travelers believing it should be extended.
 - In fact, 39% of leisure travelers and 37% of business travelers believe the mask mandate should be extended until the U.S. reaches 80% vaccination rate.
- Leisure travel continues to lead the way in this very early stage of travel recovery as we saw the largest divergence in the Index since October, with leisure travel reaching 3.54 and business travel dropping slightly since last month to 3.18.
 - Over 75% of leisure travelers would travel domestically for leisure purposes in the next 6 months, a significant jump from 67% last month and the highest level reached during the pandemic.
 - More leisure travelers have made future reservations than business travelers (47% vs. 20%).
- The percentage of travelers that are fully “ready to travel” showed improvement on the leisure side jumping from 16% to 25% since March while it fell from 25% to 20% for business travelers during the same time period. Overall these numbers are still very low.
- The number of vaccinated travelers continues to rise with nearly three-quarters of all travelers having received at least one dose of the COVID-19 vaccination.

Traveler Confidence Index

Business Traveler Confidence Index - USA: April 2021



Qualitative Questions: Business Travelers

Q1: How many times have you traveled on an airplane and/or stayed in a hotel for business since March 2020?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
0	87.10%	76.8%	74.4%
1	10.48%	18.4%	15.2%
2+	2.42%	4.8%	10.4%

Q2: Would you travel domestically for business purposes in the next 90 days if asked by your company?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	48.39%	60.8%	55.2%
No	29.84%	15.2%	24.0%
Uncertain	21.77%	24.0%	20.8%

Q3: Would you travel internationally for business purposes in the next 90 days if asked by your company?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	37.90%	37.6%	35.2%
No	45.16%	40.0%	42.4%
Uncertain	16.94%	22.4%	22.4%

Q4: Have you made future reservations that include traveling on an airplane and/or staying in a hotel for business travel?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	11.29%	19.2%	20.0%
No	88.71%	80.8%	80.0%

Q5: Please rate your overall confidence level in traveling for business if required by your employer. (1=no confidence; 5=ready to travel now)

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
1 (no confidence)	14.52%	8.0%	9.6%
2	24.19%	22.4%	22.4%
3	33.87%	36%	28.8%
4	8.06%	8.0%	19.2%
5 (ready to travel now)	19.35%	25.6%	20.0%

Qualitative Questions: Business Travelers (continued)

Q6: Would you be willing to take multiple COVID tests before and during travel, and share your results to resume traveling without restrictions?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	74.80%	79.2%	71.2%
No	25.20%	20.8%	28.8%

Q7: Which of the following would increase your confidence in traveling (check all that apply)?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Frequent Cleaning	73.77%	73.55%	61.79%
Masks Required	86.07%	78.51%	72.36%
COVID testing for yourself	61.48%	60.33%	44.72%
Mandatory COVID testing for all travel provider staff	62.30%	63.64%	52.03%
Limited crowd size	73.77%	69.42%	70.73%
Middle seats empty	80.33%	72.73%	70.73%
Social Distancing required	74.59%	65.29%	66.67%
Vaccination for yourself	62.30%	69.42%	72.36%
Vaccination for travel provider	58.20%	66.12%	66.67%

Q8: Will you take the COVID-19 Vaccine when it is available to you?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	83.06%	34.96%	12.8%
No	16.94%	13.82%	14.4%
I've already received at least one shot		51.22%	72.8%

Qualitative Questions: Business Travelers (continued)

Q9: The U.S. mask mandate for domestic and international flights is set to expire on May 11, 2021. When thinking about domestic flights only, which best describes how you feel:

Answer Choices	Responses - Apr-21
The mask mandate for domestic flights should expire on May 11, 2021	23.2%
The mask mandate for domestic flights should be extended until the Fall	15.2%
The mask mandate for domestic flights should be extended until 80% of US residents are vaccinated	36.8%
The mask mandate for domestic flights should be extended indefinitely	24.8%

Qualitative Questions: Leisure Travelers

Q1: How many times have you traveled on an airplane and/or stayed in a hotel (or vacation rental property) for leisure reasons since March 2020?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
0	66.09%	63.2%	67.72%
1	23.48%	20.0%	18.9%
2+	10.43%	16.8%	13.39%

Q2: If you could afford to do so, would you travel domestically for leisure purposes in the next 6 months?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	62.61%	67.2%	75.59%
No	17.39%	8.8%	10.24%
Uncertain	20.00%	24.0%	14.17%

Q3: If you could afford to do so, would you travel internationally for leisure purposes in the next 6 months?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	30.43%	35.2%	37.8%
No	39.13%	39.2%	39.37%
Uncertain	30.43%	25.6%	22.83%

Q4: Have you made future reservations that include traveling on an airplane and/or staying in a hotel (or vacation rental property) for leisure travel?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	29.57%	46.4%	47.24%
No	70.43%	53.6%	52.76%

Q5: Please rate your overall confidence level in traveling for business if required by your employer. (1=no confidence; 5=ready to travel now)

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
1 (no confidence)	6.96%	5.6%	2.36%
2	26.09%	15.2%	11.02%
3	33.91%	41.6%	42.52%
4	18.26%	20.8%	18.9%
5 (ready to travel now)	14.78%	16.8%	25.2%

Qualitative Questions: Leisure Travelers (continued)

Q6: Would you be willing to take multiple COVID tests before and during travel, and share your results to resume traveling without restrictions?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	72.17%	79.2%	67.72%
No	27.83%	20.8%	32.28%

Q7: Which of the following would increase your confidence in traveling (check all that apply)?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Frequent Cleaning	72.57%	66.94%	64.8%
Masks Required	78.76%	77.42%	68.8%
COVID testing for yourself	52.21%	55.23%	40.0%
Mandatory COVID testing for all travel provider staff	52.21%	55.65%	48.8%
Limited crowd size	67.26%	65.32%	66.4%
Middle seats empty	64.60%	70.16%	61.6%
Social Distancing required	64.60%	63.71%	59.2%
Vaccinations for yourself	53.98%	71.77%	70.4%
Vaccinations for travel provider staff	46.90%	63.71%	62.4%

Q8: Will you take the COVID-19 Vaccine when it is available to you?

Answer Choices	Responses - Feb-21	Responses - Mar-21	Responses - Apr-21
Yes	81.58%	45.6%	14.96%
No	18.42%	8.8%	13.39%
I've already received at least one shot		45.6%	71.65%

Qualitative Questions: Leisure Travelers (continued)

Q9: The U.S. mask mandate for domestic and international flights is set to expire on May 11, 2021. When thinking about domestic flights only, which best describes how you feel:

Answer Choices	Responses - Apr-21
The mask mandate for domestic flights should expire on May 11, 2021	22.05%
The mask mandate for domestic flights should be extended until the Fall	22.05%
The mask mandate for domestic flights should be extended until 80% of US residents are vaccinated	38.58%
The mask mandate for domestic flights should be extended indefinitely	17.32%

Methodology

This independent research was conducted online in the United States between April 27-29, 2021 for business and leisure travelers. Pre-qualified business travelers and leisure travelers were asked to participate in this study by invitation. In total, 252 individuals responded to the survey. Among all survey respondents, 50.4% were leisure travelers and 49.6% were business travelers. The margin of error of the results is +/- 8.6%. Demographic information of the respondents is as follows:

Business Travelers		Leisure Travelers	
Gender		Gender	
Answer Choices	Responses	Answer Choices	Responses
Male	48.0%	Male	48.0%
Female	52.0%	Female	52.0%
Household Income		Household Income	
Answer Choices	Responses	Answer Choices	Responses
<\$50,000	15.2%	<\$50,000	21.26%
\$50,000-\$74,999	8.0%	\$50,000-\$74,999	17.32%
\$75,000-\$99,999	16.0%	\$75,000-\$99,999	16.54%
\$100,000-\$124,999	12.8%	\$100,000-\$124,999	14.96%
\$125,000-\$149,999	8.8%	\$125,000-\$149,999	4.72%
\$150,000-\$174,999	8.8%	\$150,000-\$174,999	3.94%
\$175,000-\$199,999	2.4%	\$175,000-\$199,999	0.79%
\$200,000+	13.6%	\$200,000+	7.87%
Prefer not to answer	14.4%	Prefer not to answer	12.6%
Location		Location	
Answer Choices	Responses	Answer Choices	Responses
New England	6.5%	New England	7.2%
Middle Atlantic	13.01%	Middle Atlantic	13.6%
East North Central	15.45%	East North Central	15.2%
West North Central	8.95%	West North Central	6.4%
South Atlantic	10.57%	South Atlantic	15.2%
East South Central	3.25%	East South Central	2.4%
West South Central	7.32%	West South Central	9.6%
Mountain	9.76%	Mountain	10.4%
Pacific	25.2%	Pacific	20.0%