Inbound COVID-19 Sentiment Tracker

Market Snapshot – USA

Read the full report for Wave 3 here (PDF, 7.6MB)
USA Market Summary

Travel intentions

- Intending to travel abroad for leisure*:
  - Wave 1: 69%
  - Wave 2: 73%
  - Wave 3: 80%

Journey purpose

- Holiday: 85%
- Visit friends or relatives: 35%
- Other leisure purposes: 32%

Planning stage

- Trip booked:
  - Wave 1: 14%
  - Wave 2: 24%
  - Wave 3: 28%
- Destination chosen:
  - Wave 1: 16%
  - Wave 2: 25%
  - Wave 3: 34%
- Trip planned:
  - Wave 1: 21%
  - Wave 2: 23%
  - Wave 3: 32%
- Intend to travel:
  - Wave 1: 33%
  - Wave 2: 26%
  - Wave 3: 23%

Among leisure trip intenders:

- Europe: 52%
- Britain: 9%

Among Britain intenders:

- England: 66%
- Scotland: 37%
- London: 22%
- Wales: 22%

(*% definitely & probably in the next 12 months)

Travel preferences

Top activities

- History and heritage: 57%
- Iconic tourist attractions: 57%
- Dining out: 54%
- Visiting cultural attractions: 53%
- Outdoor nature activities: 51%

Destination types

- Will roam around: 39%
- Large city: 50%
- Country/village: 29%
- Small/midsized city/town: 26%
- Mountains or hills: 28%

Top Travel Companions

- With your spouse/partner: 73%
  - Wave 1: 31%
  - Wave 2: 17%
  - Wave 3: 17%
  - With adult family members: 15%
- As part of a tour group: 4%

Top Accommodation

- Hotel chain: 65%
- Boutique hotel: 38%
- Bed and breakfast: 36%
- Private rental: 30%
- Historic house/castle: 30%

Top modes of transport within Britain

- Domestic flight: 49%
- Rented car/vehicle: 38%
- Public transport - Train: 37%
- Public transport - Tube/subway: 32%
- Own car vehicle: 32%
- Taxi: 32%
- Private coach/minibus: 30%
- Uber/other sharing app: 26%
- Public transport - Bus: 25%
USA Market Summary

Top travel drivers

- Decrease in coronavirus cases at destination: 35%
- Money-back guarantee should I wish to cancel my trip: 35%
- High proportion of destination population being vaccinated: 32%
- Hygiene & safety protocols in place at destination: 31%
- Receiving a Covid-19 vaccination: 26%

Travel concerns – for travel to Britain*

- Costs of mandatory COVID-19 tests: 82%
- Access to healthcare if I contract COVID-19 abroad: 79%
- Limited / restricted experiences at destination: 77%
- Change in quarantine requirements on my return home: 75%
- Contracting COVID-19 during my journey/trip: 74%
- Extra admin involved with new policy/rules during the trip: 72%
- Affordability of robust travel insurance: 68%
- Locals’ attitude towards international tourists: 68%
- Accessibility of affordable air fares: 67%
- Costs of mandatory COVID-19 tests: 60%

Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 85%, 31.2%
- I will look for less crowded places, even if I miss attractions: 73%, 3%, 24%
- Booking through a travel agent is a safer option at the moment: 68%, 8%, 24%
- I will think more about sustainability when planning future holidays: 65%, 9%, 27%
- I will favour local destinations instead of traveling internationally: 64%, 5%, 31%
- I would be comfortable using public transport within the destination: 62%, 4%, 33%
- I will travel internationally as soon as I can after I get the vaccine: 62%, 8%, 30%
- I will be intending to take fewer but longer holidays: 61%, 10%, 29%
- I will favor destinations I have been before rather than new places: 56%, 7%, 37%
- Due to covid-restrictions, I will have more annual leave to use: 52%, 18%, 30%
- I will leave booking until later/last minute: 52%, 4%, 45%

*% very & somewhat concerned

**% completely & somewhat agree

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated