

**Travel Again**

**Traveler Confidence Index  
USA Edition  
January 2021**



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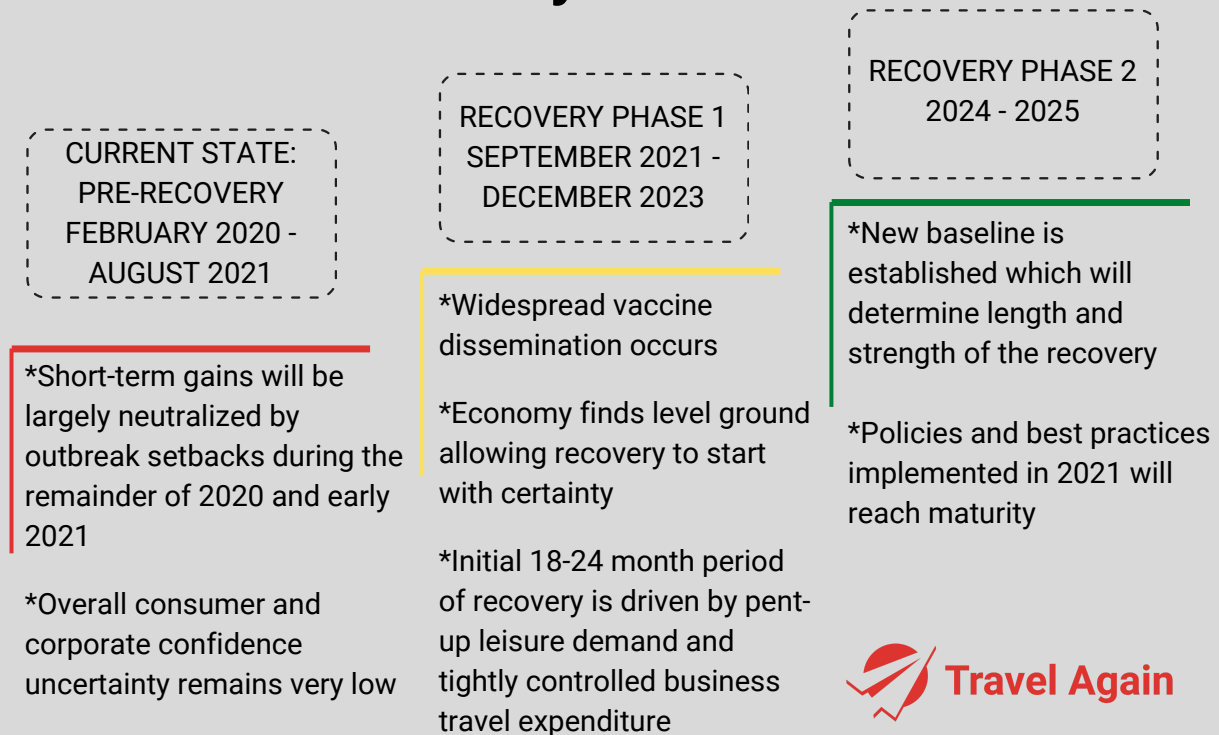
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# Introduction

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](https://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.



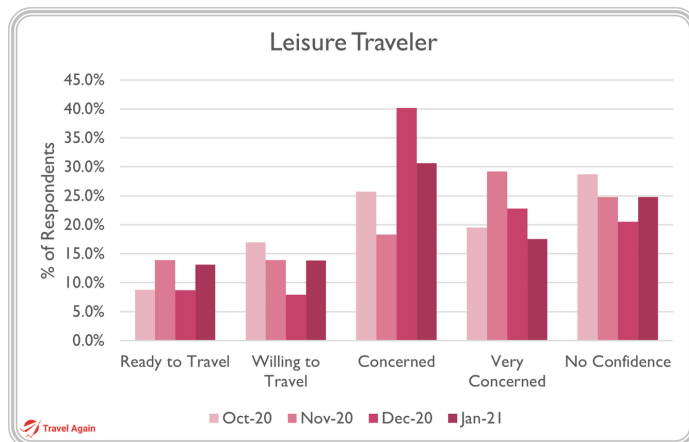
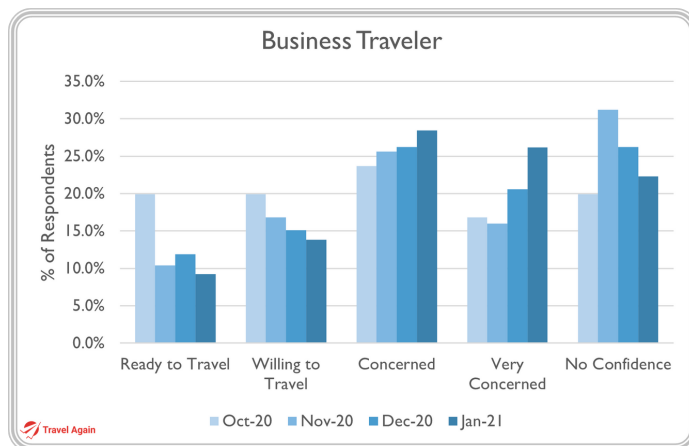
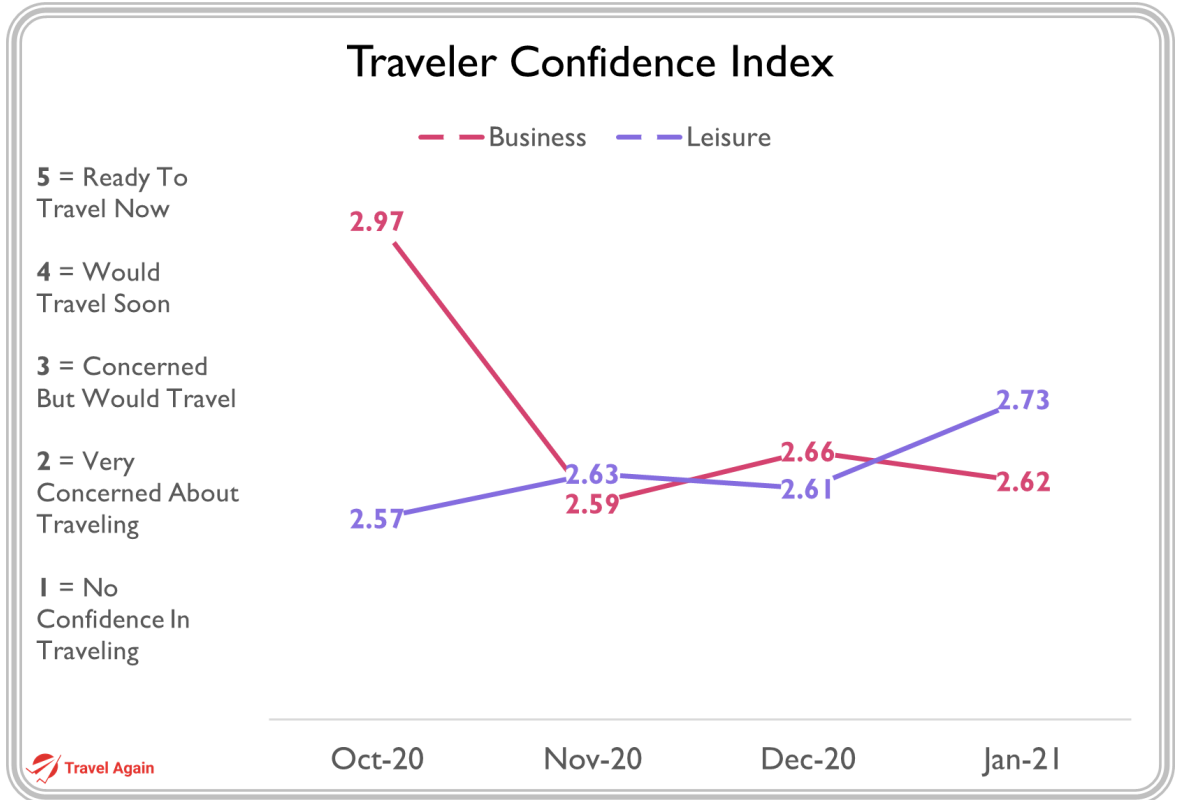
## Key Takeaways

Key takeaways from this study are:

- President Biden’s federal mask mandate requiring masks on planes, buses, trains and in airports received a 91% traveler confidence approval rating, with 50% of respondents saying that it increased their confidence in traveling, 41% said it had no change and only 9% said it decreased their confidence.
  - Over 55% of leisure travelers would travel domestically for leisure purposes in the next 6 months, the highest level reached during the pandemic.
  - More leisure travelers have made future reservations than business travelers (29% vs. 11%), as business travel has declined again to its lowest level since the pandemic struck.
- The percentage of travelers that are fully “ready to travel” is still very low (9% for business travelers and 13% for leisure travelers).
- Over 80% of all travelers would agree to take a COVID-19 vaccine if available.
- Mandatory masks and frequent cleaning are still the most important confidence building elements, even ahead of vaccine usage by travelers or travel provider staff.
- Overall traveler confidence is maintaining a very low, plateaued level, with continued significant uncertainty about future traveling for both business and leisure travelers.

# Traveler Confidence Index

## Business Traveler Confidence Index - USA: January 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 - Nov-20	Responses - Dec-20	Responses - Jan-21
0	79.20%	75.40%	85.61%
1	11.20%	15.87%	6.82%
2+	9.60%	8.73%	7.58%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	39.20%	43.65%	39.39%
No	36.80%	37.30%	33.33%
Uncertain	24.00%	19.05%	27.27%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	24.80%	24.60%	21.21%
No	53.60%	60.32%	56.06%
Uncertain	21.60%	15.08%	22.73%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	8.80%	19.05%	10.61%
No	91.20%	80.95%	89.39%

**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 - Nov-20	Responses - Dec-20	Responses - Jan-21
1 (no confidence)	31.20%	26.19%	22.31%
2	16.00%	20.63%	26.15%
3	25.60%	26.19%	28.46%
4	16.80%	15.08%	13.85%
5 (ready to travel now)	10.40%	11.90%	9.23%

# 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 - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	70.40%	64.00%	70.23%
No	25.60%	36.00%	29.77%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Frequent Cleaning	83.19%	79.84%	72.87%
Masks Required	84.03%	76.61%	83.72%
COVID testing for yourself	60.50%	62.90%	52.71%
Mandatory COVID testing for all travel provider staff	77.31%	75.00%	58.91%
Limited crowd size	81.51%	80.65%	78.29%
Middle seats empty	78.99%	85.48%	78.29%
Social Distancing required	79.83%	79.84%	79.84%
Vaccination for yourself			70.54%
Vaccination for travel provider			60.47%

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

Answer Choices	Responses - Dec-20	Responses - Jan-21
Yes	75.40%	81.40%
No	24.60%	18.60%

**Q9: What impact does the recent Biden Administration policy requiring use of masks while traveling have on you?**

Answer Choices	Responses - Jan-21
Increases my confidence in traveling	53.44%
Has no impact on my travel decision	38.93%
Decreases my confidence in traveling	7.63%

# 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 - Nov-20	Responses - Dec-20	Responses - Jan-21
0	65.69%	58.27%	61.31%
1	19.71%	20.47%	21.17%
2+	14.60%	21.26%	17.52%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	48.18%	44.09%	55.47%
No	27.01%	22.05%	21.17%
Uncertain	24.82%	33.86%	23.36%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	25.55%	22.05%	29.20%
No	55.47%	50.39%	51.09%
Uncertain	18.98%	27.56%	19.71%

**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 - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	25.55%	22.05%	29.20%
No	74.45%	77.95%	70.80%

**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 - Nov-20	Responses - Dec-20	Responses - Jan-21
1 (no confidence)	24.82%	20.47%	24.82%
2	29.20%	22.83%	17.52%
3	18.25%	40.16%	30.66%
4	13.87%	7.87%	13.87%
5 (ready to travel now)	13.87%	8.66%	13.14%



# 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 - Nov-20	Responses - Dec-20	Responses - Jan-21
Yes	75.18%	70.08%	67.16%
No	24.82%	29.92%	32.84%

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

Answer Choices	Responses - Nov-20	Responses - Dec-20	Responses - Jan-21
Frequent Cleaning	82.35%	81.15%	73.88%
Masks Required	91.18%	84.43%	84.33%
COVID testing for yourself	60.29%	58.20%	57.46%
Mandatory COVID testing for all travel provider staff	75.74%	73.77%	64.18%
Limited crowd size	83.09%	78.69%	79.85%
Middle seats empty	70.59%	76.23%	71.64%
Social Distancing required	80.88%	81.15%	72.39%
Vaccinations for yourself			68.66%
Vaccinations for travel provider staff			59.70%

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

Answer Choices	Responses - Dec-20	Responses - Jan-21
Yes	80.95%	81.75%
No	19.05%	18.25%

**Q9: What impact does the recent Biden Administration policy requiring masks while traveling have on you?**

Answer Choices	Responses - Jan-21
Increases my confidence in traveling	47.45%
Has no impact on my travel decision	43.07%
Decreases my confidence in traveling	9.49%

# Methodology

This independent research was conducted online in the United States on January 25, 2021 for leisure travelers and between January 25-29, 2021 for business travelers. Pre-qualified business travelers and leisure travelers were asked to participate in this study by invitation. In total, 273 individuals responded to the survey. Among all survey respondents, 51% were leisure travelers and 49% were business travelers. The margin of error of the results is +/- 8.6%. Demographic information of the respondents is as follows:

<b>Business Travelers</b>		<b>Leisure Travelers</b>	
<b>Gender</b>		<b>Gender</b>	
<b>Answer Choices</b>	<b>Responses</b>	<b>Answer Choices</b>	<b>Responses</b>
Male	52.27%	Male	47.45%
Female	47.73%	Female	52.55%
<b>Household Income</b>		<b>Household Income</b>	
<b>Answer Choices</b>	<b>Responses</b>	<b>Answer Choices</b>	<b>Responses</b>
<\$50,000	10.61%	<\$50,000	23.36%
<\$50,000-\$74,999	15.15%	<\$50,000-\$74,999	20.44%
<\$75,000-\$99,999	16.67%	<\$75,000-\$99,999	14.60%
<\$100,000-\$124,999	12.88%	<\$100,000-\$124,999	13.14%
<\$125,000-\$149,999	7.58%	<\$125,000-\$149,999	5.11%
<\$150,000-\$174,999	4.55%	<\$150,000-\$174,999	5.11%
<\$175,000-\$199,999	5.30%	<\$175,000-\$199,999	2.19%
<\$200,000+	16.67%	<\$200,000+	9.49%
Prefer not to answer	10.61%	Prefer not to answer	6.57%
<b>Location</b>		<b>Location</b>	
<b>Answer Choices</b>	<b>Responses</b>	<b>Answer Choices</b>	<b>Responses</b>
New England	3.85%	New England	2.94%
Middle Atlantic	14.62%	Middle Atlantic	11.76%
East North Central	8.46%	East North Central	19.12%
West North Central	8.46%	West North Central	2.21%
South Atlantic	16.92%	South Atlantic	19.85%
East South Central	3.08%	East South Central	5.15%
West South Central	10.00%	West South Central	2.94%
Mountain	13.85%	Mountain	14.71%
Pacific	20.77%	Pacific	21.32%