



# COVID-19 Traveler Sentiment Insight Report



## Dear reader,

The COVID-19 pandemic is devastating the travel world. Matador Network reached out to our global community of avid travelers and deployed an in-depth survey to understand how their thoughts and behaviors toward travel have shifted as a result of the crisis.

The first part of the survey (and this report) covers the demographics and pre-COVID travel patterns of our respondents. From there, we move on to focus on how people feel about travel now, and what they expect a return to travel to look like.

The travel industry is resilient, and we're stronger together. Our goal in creating and sharing this report is to leverage our unique access to passionate travelers in order to best position all of us for co-creating a new reality.

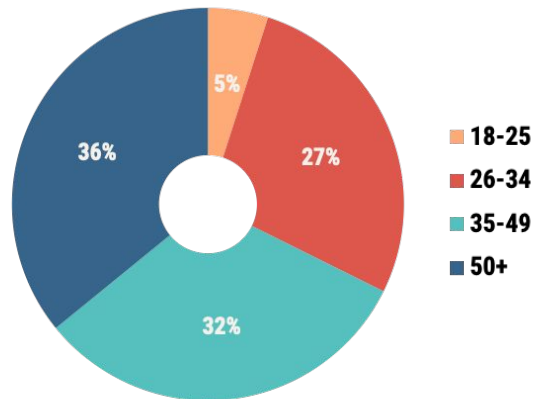


**Ross Borden**  
CEO and Founder

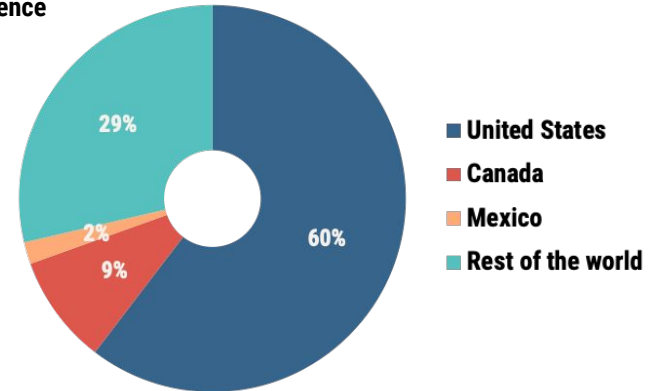
## Audience profile

Via our newsletter and social media channels, we invited our global audience of travelers to participate in an online survey. Between April 9 and April 13, 2020, **2,179 individuals** from North America and other parts of the world completed our multiple-choice questions and open-ended prompts.<sup>1</sup>

Age



Country of residence



### Key characteristics of respondents:

- 92% traveled domestically and 76% traveled internationally in 2019.
- 96% traveled for leisure in 2019, while 55% traveled for work at least once in that year.
- 60% do not have children, 20% have children living with them, and 20% are “empty nesters.”
- 23% identify as belonging to a group at elevated risk from COVID-19 infection, 72% do not believe they belong to such a group, and 5% are unsure of their risk level.

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<sup>1</sup> Please refer to the appendix and reach out to us at [survey@matadornetwork.com](mailto:survey@matadornetwork.com) for additional resources.



## Summary

This report examines how our respondents have been affected thus far, when they expect travel to recommence, and what travel will look like when it does.

**KEY TAKEAWAY:** For our global community of avid travelers, passion for travel remains strong and, in most cases, a sense of optimism is carrying them through the current stay-at-home and social-distancing directives.

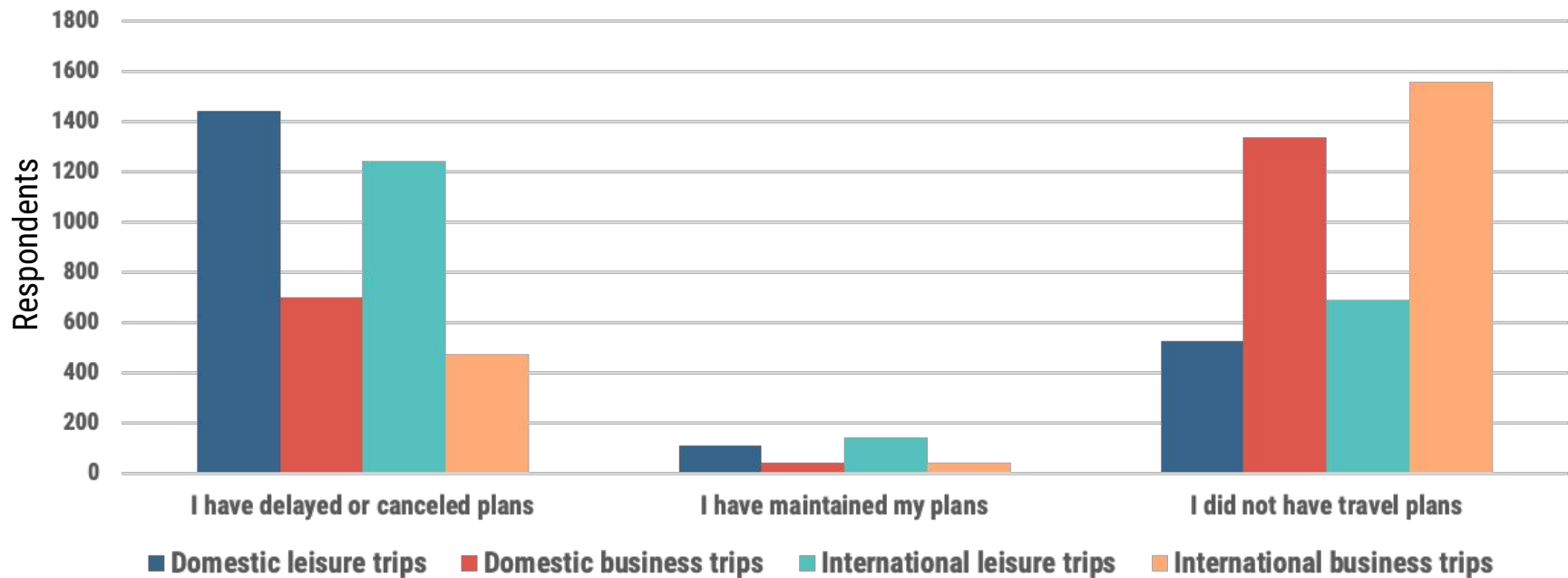
### Caveat

The number of survey responses we received allows for a statistically significant analysis of sentiments and trends. We are aware, however, that results cannot be generalized to all travelers (or even to all US travelers), and that as Matador's audience, respondents likely have inherent biases and proclivities. This is why, throughout the report, we fondly refer to them as "avid travelers."

## Immediate impact

**KEY TAKEAWAY:** Only around 4% of respondents said they are maintaining existing leisure and/or business travel plans.

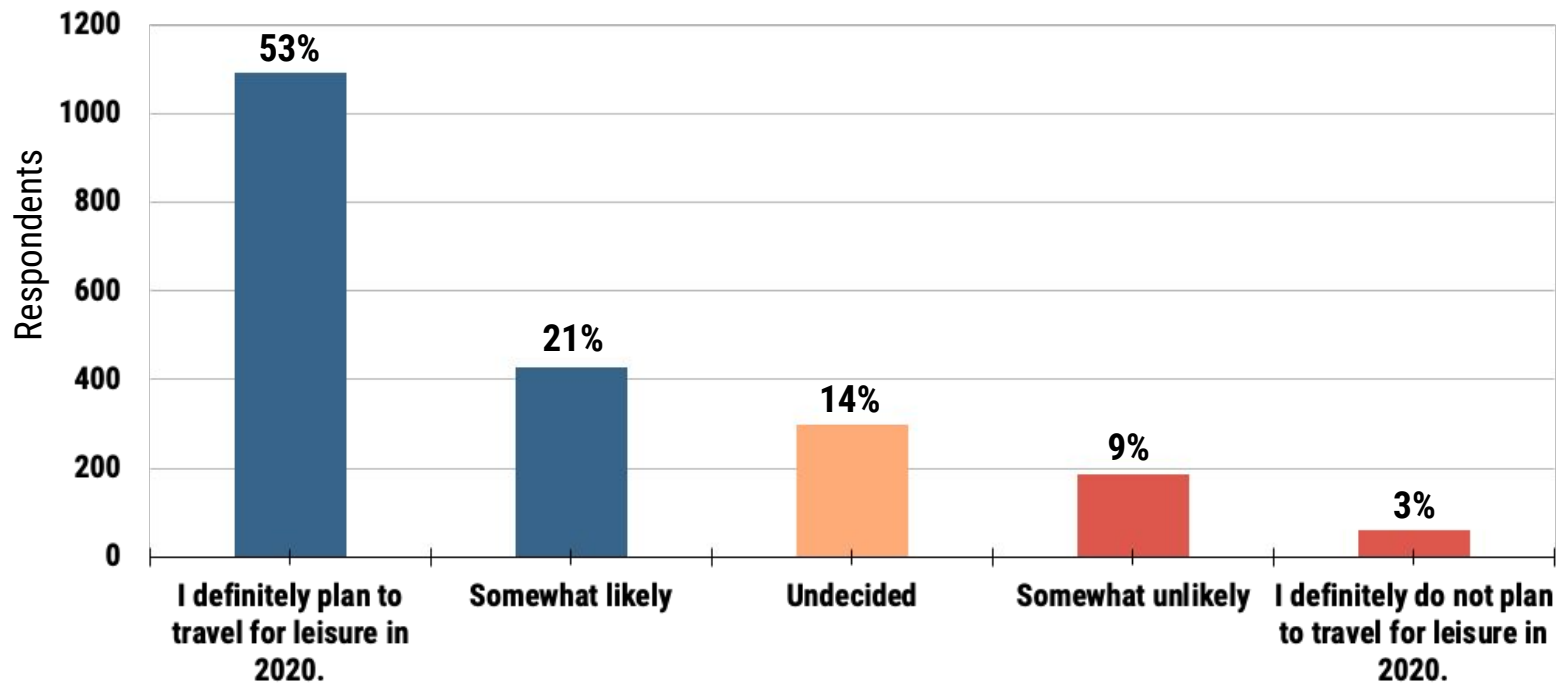
### Changes to travel plans due to the coronavirus crisis



## Anticipating a return to travel

**KEY TAKEAWAY:** Fewer than 3% of respondents have ruled out traveling in 2020, while 74% still view it as a likelihood.

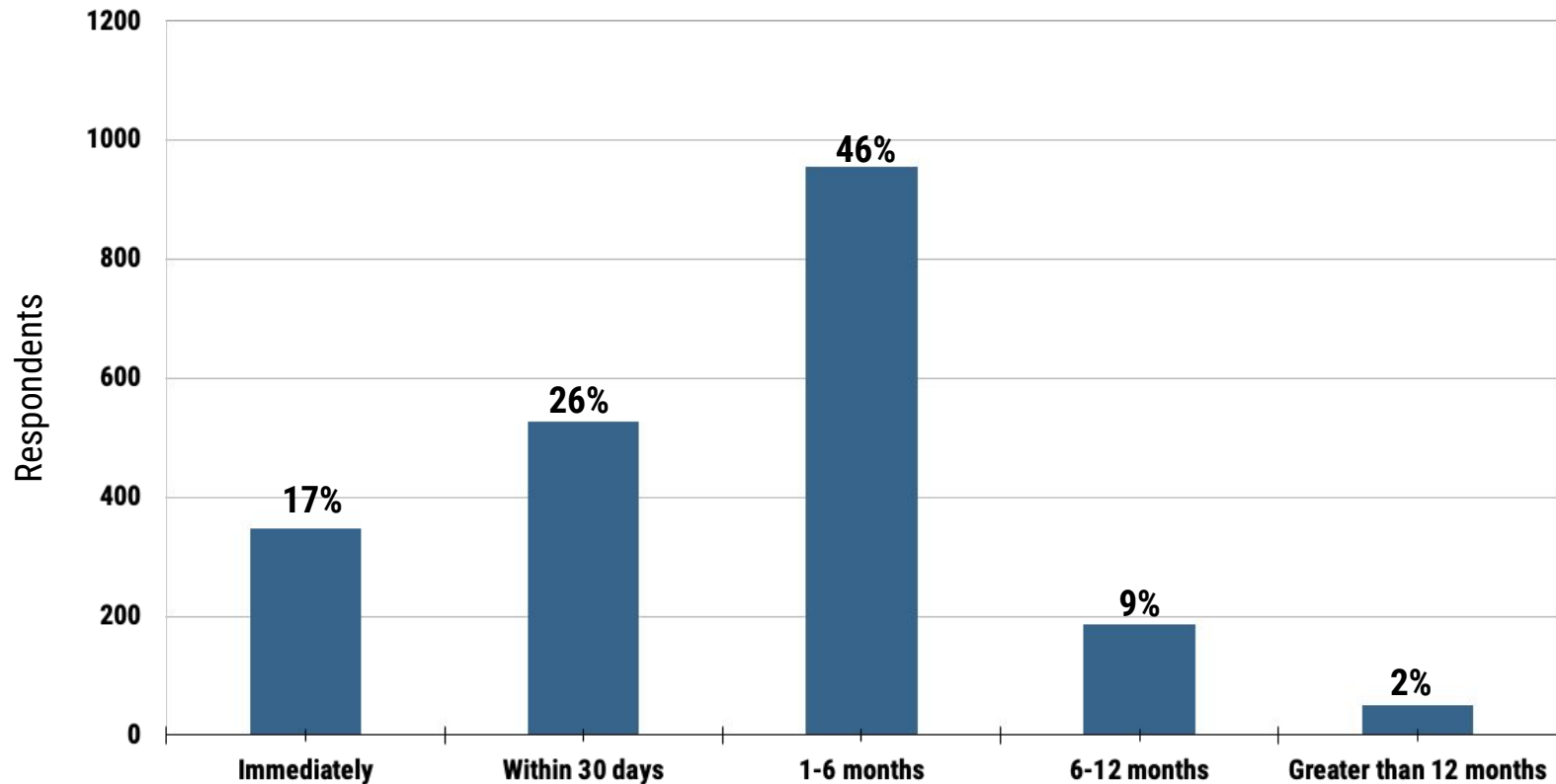
### Likelihood of traveling for leisure in 2020



## Anticipating a return to travel

**KEY TAKEAWAY:** 89% of respondents plan to travel within 6 months or less once it is deemed safe.

**"Once authorities in your country establish that travel is safe, how soon do you imagine you'll start traveling for leisure again?"**

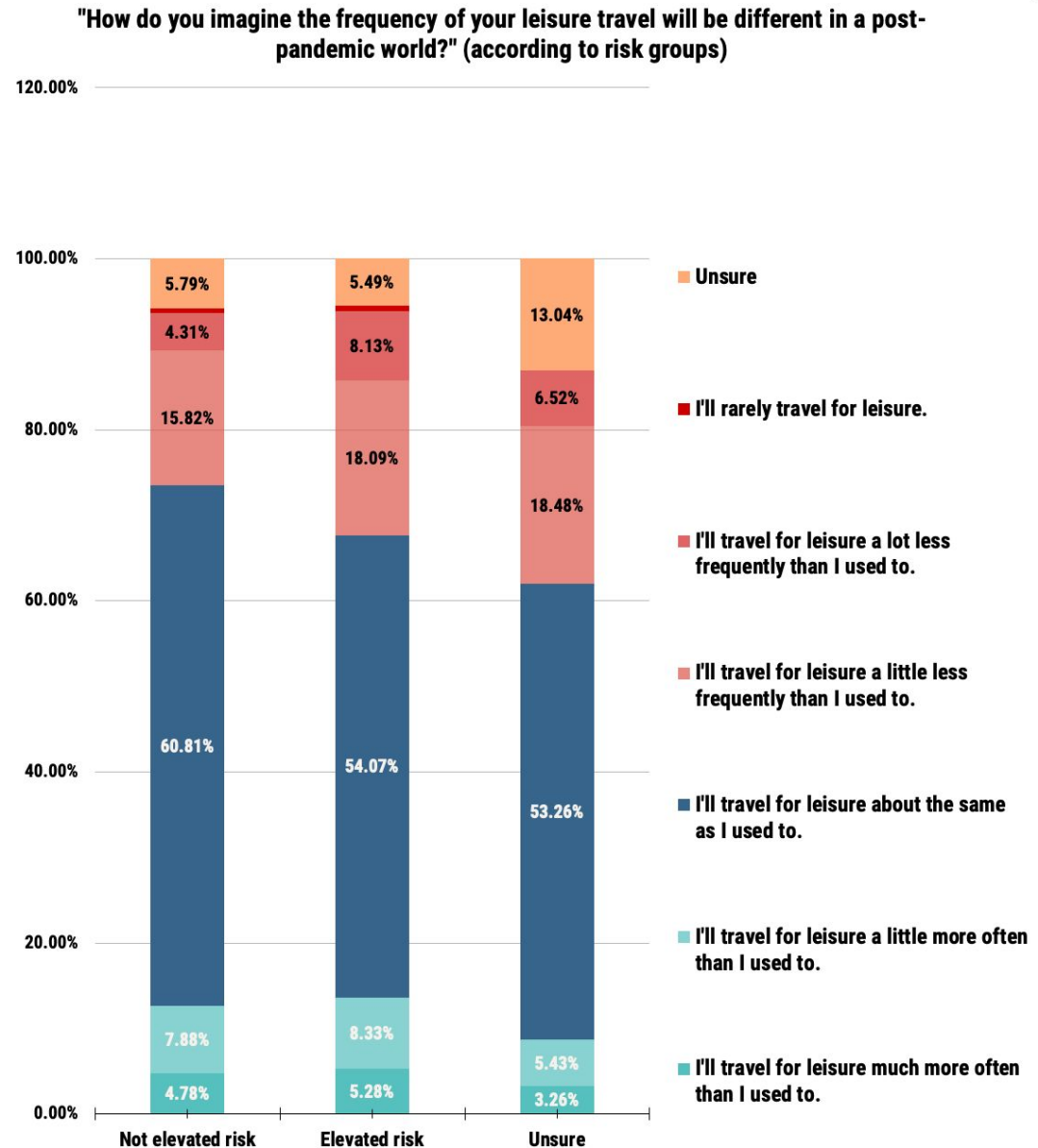


## Future travel behavior

**KEY TAKEAWAYS:** 71% of all respondents imagine traveling just as much, or more, than they did pre-pandemic.

This sentiment extends across all three risk groups, while those who self-identified as having no elevated risk plan to travel at slightly higher rates: *more than 73% will maintain or increase frequency.*

Also noteworthy is that even a majority of travelers who consider themselves at elevated risk from COVID-19 infection expect to travel as much as they used to (54%) or more than they used to (13%).





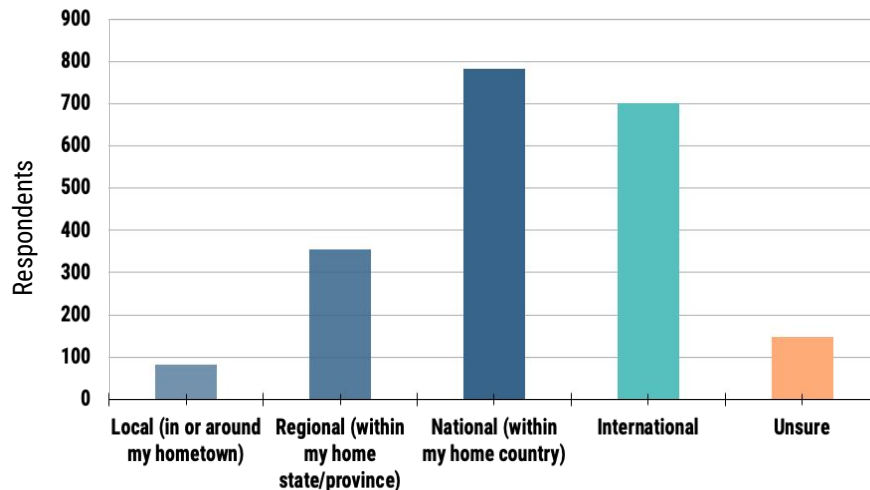
## Future travel behavior

**KEY TAKEAWAYS:** 71% of travelers are looking beyond their home state/province for their next trip. Nearly half (49%) plan to travel by air, while 40% plan to drive.

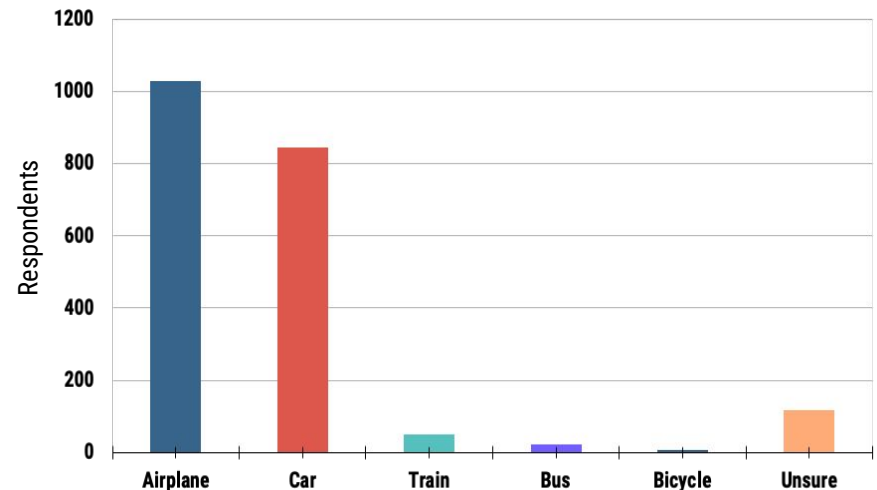
*“Yes (I would feel the same way about traveling), but may consider adding insurance to flights or only booking trips that are fully refundable.”*

- 26–34 traveler, living on the US West Coast

“I expect my next leisure travel destination to be:”



“I am most likely to take my next leisure trip by:”

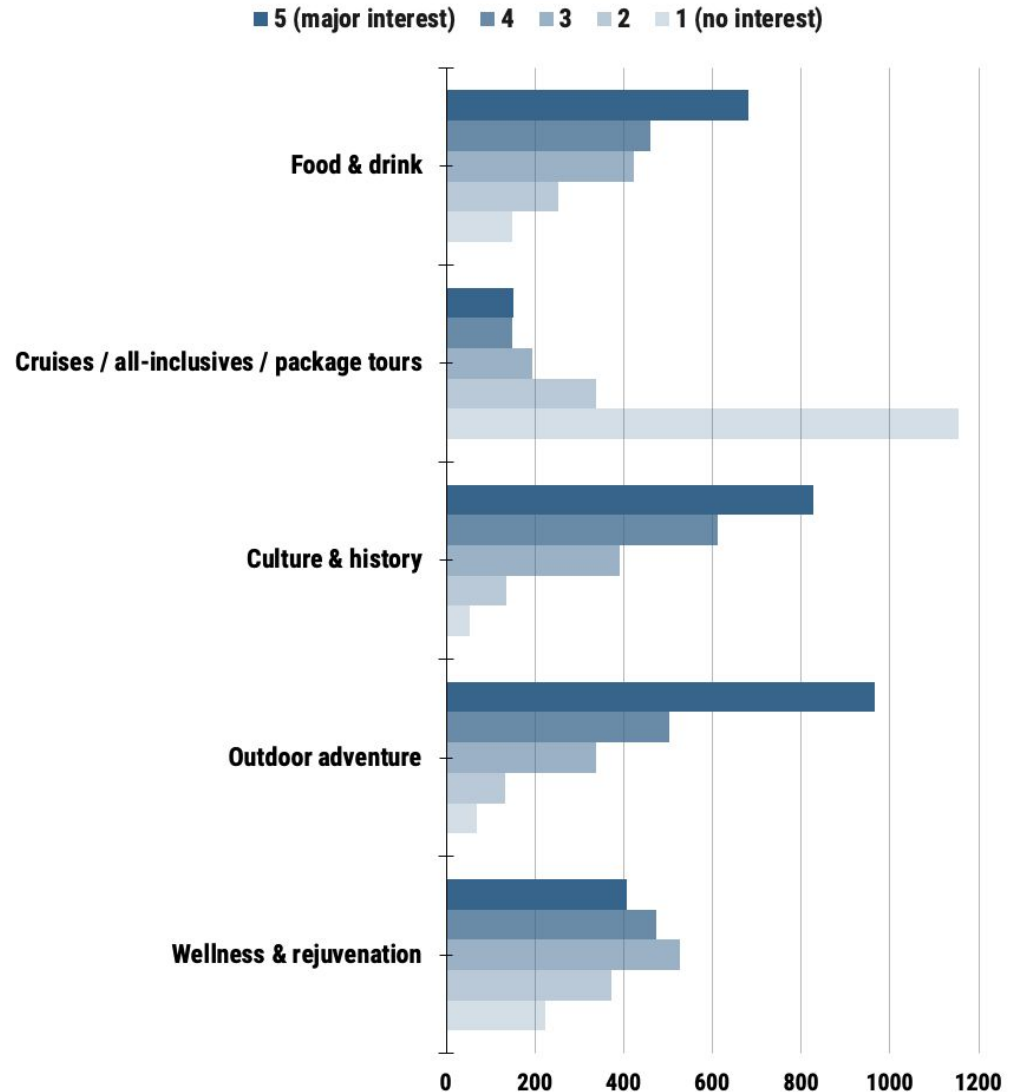


## Wanderlust in lockdown

**KEY TAKEAWAY:** Outdoor adventure holds the strongest appeal for respondents imagining their return to leisure travel, followed by culture & history activities and food & drink.

In addition to the adventure, culinary, cultural, and wellness aspects of travel, respondents expressed strong feelings in the open-ended prompts about simply missing people, making new connections, and having new experiences.

"Once authorities in your country establish that travel is safe, what type of leisure travel attractions will you be most interested in?"



## Wanderlust in lockdown

**Open ended prompt: What aspect of travel do you miss the most during this time of crisis?**

***“The sense of freedom and adventure that comes with going to a new place, meeting new people and learning about foreign cultures.”***

- 26-34 traveler living on the US East Coast

***"I miss planning and anticipating trips as something to look forward to in the year."***

- 35-49 traveler, living on the US East Coast



***"(I miss) Seeing new places. My world has become very small since the virus started. I look forward to something new and different."***

- 50+ traveler, living in the US Midwest, self-identified as being at elevated risk from COVID-19

## Navigating the now

This time in isolation will have a profound impact on travelers across the world. While we can't predict all the ways it will change the travel industry, through our survey we have started to get a sense of a newfound appreciation and conscientiousness that the crisis has generated.

*"I wasted time making any serious plans to travel. I believed that I would start my plans to be a world drifter in 2020. Then coronavirus happened and now I have been sitting in quarantine wondering why I wasted so much time. Why I didn't just get out there and go. Once the dust has settled I don't plan on dilly dallying."*

- 26–34 traveler, living outside of North America

*"I would like to see a substantial shift in the habits of travelers, the way tourism companies operate, and the way travel influencers promote destinations."*

- 26–34 traveler, living on the US East Coast

Though we can't travel yet, we can still dream, reminisce about amazing times on the road, and plot our next adventures—whenever and wherever they may be. Until the world reopens to explorers across the globe, we ask you to join us in this practice of patient optimism.

# Thank you

Thank you for taking the time to learn more about traveler sentiment in the face of COVID-19.

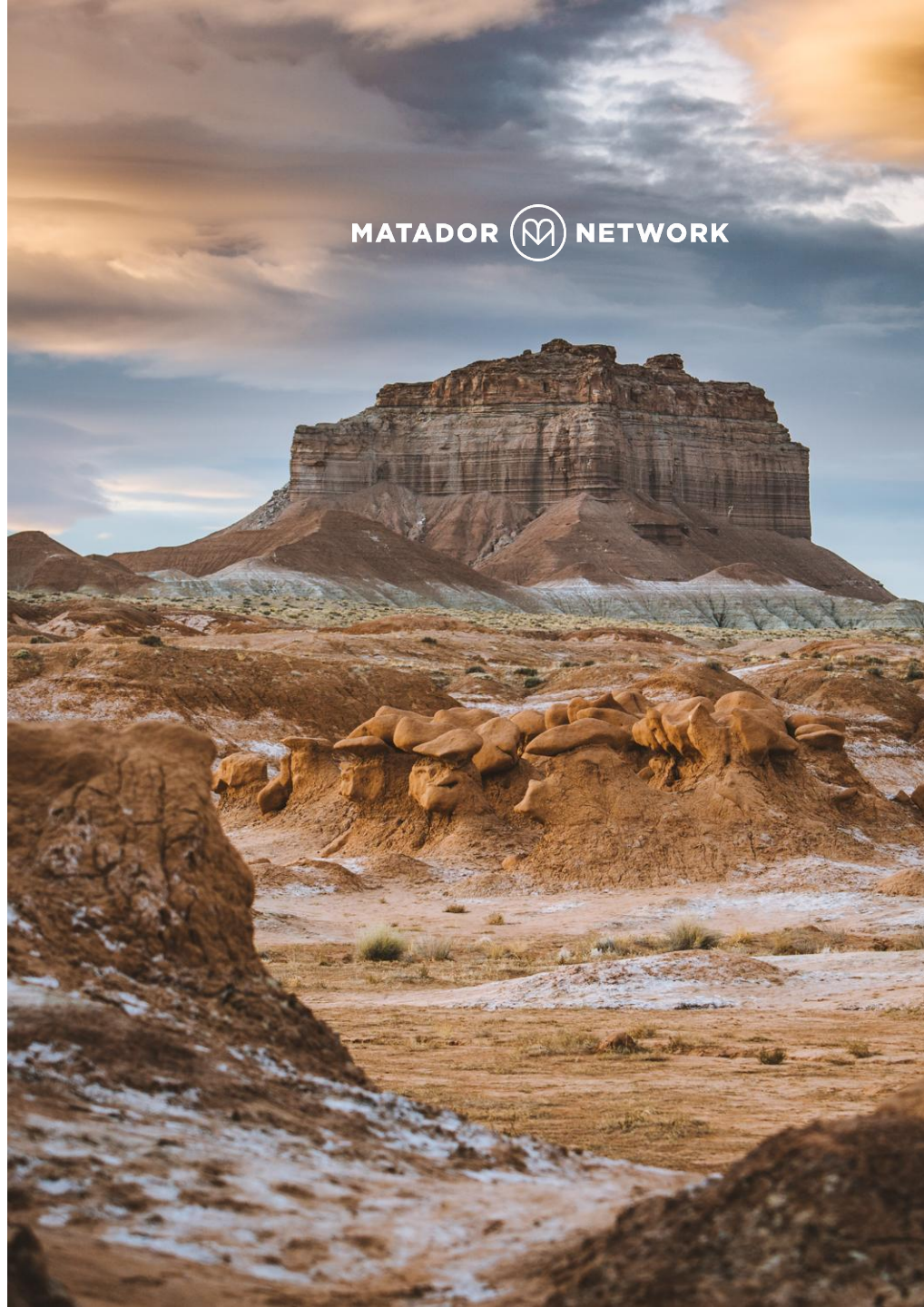
If you're interested in further exploring our data, please note that the following segments are available for review:

1. US travelers
2. Canadian travelers
3. Results by age group
4. Results by family status
5. Results by risk group

Please direct requests to:

[survey@matadornetwork.com](mailto:survey@matadornetwork.com)

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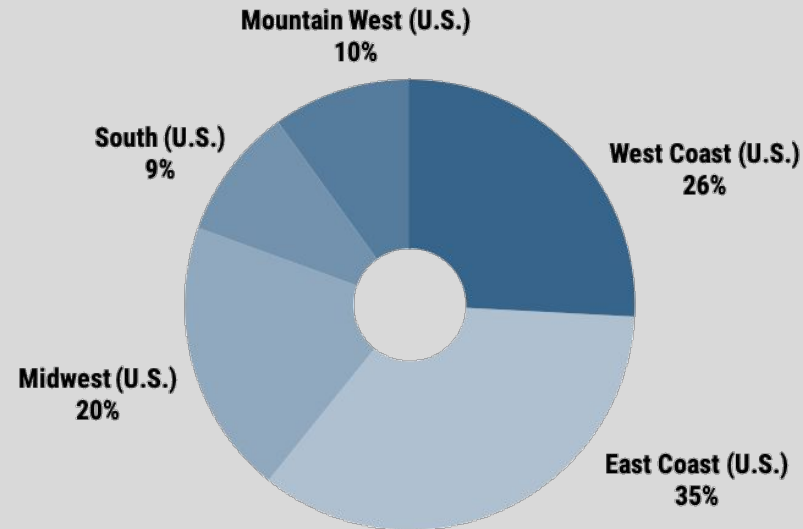


## Appendix | Additional survey questions

### Profile

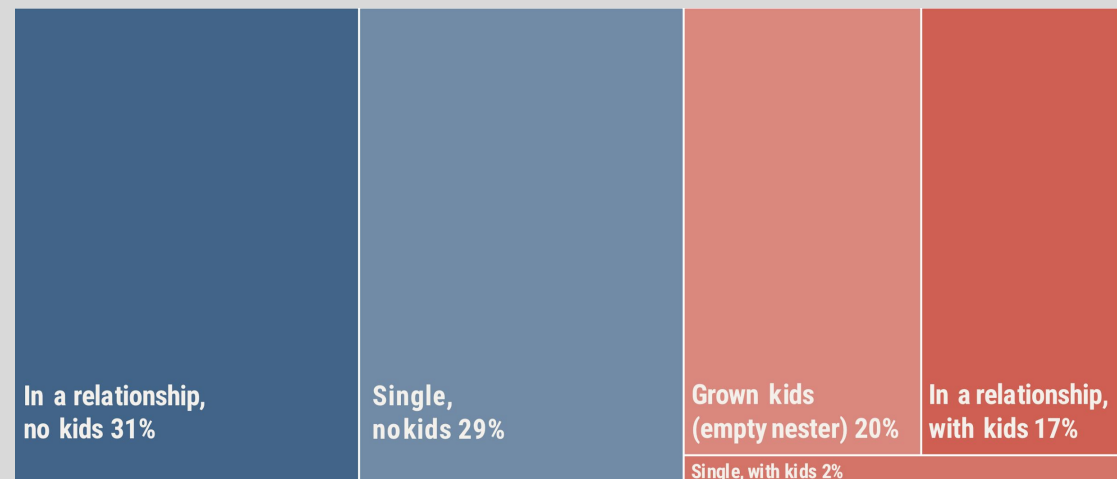
Where do you live (U.S.)?

- ☐ West Coast (U.S.)
- ☐ East Coast (U.S.)
- ☐ Midwest (U.S.)
- ☐ South (U.S.)
- ☐ Mountain West (U.S.)
- ☐ Mexico
- ☐ Canada
- ☐ Outside of North America



Which of the following best describes you?

- ☐ Single, no kids
- ☐ Single, with kids
- ☐ In a relationship, no kids
- ☐ In a relationship, with kids
- ☐ Have grown kids / empty nester

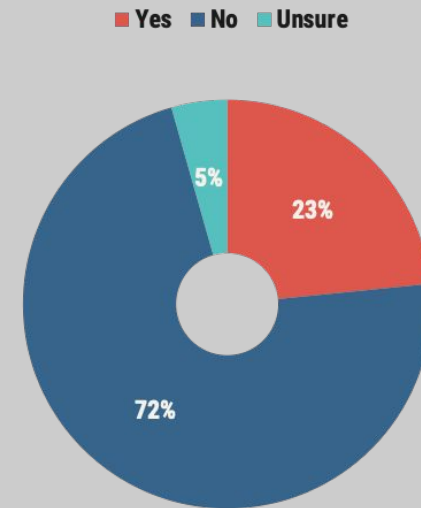




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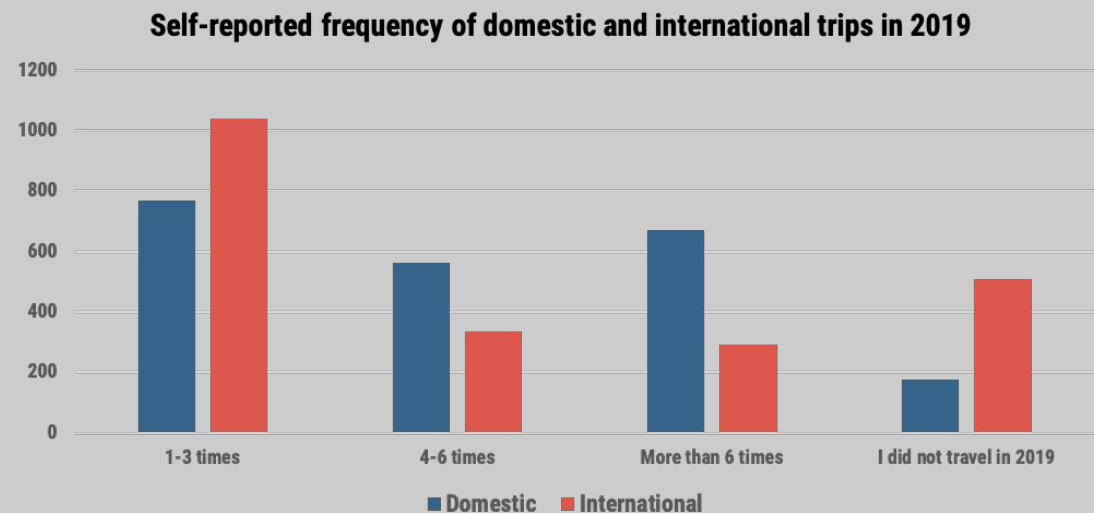
Are you part of a group at elevated risk from coronavirus infection (e.g., underlying medical condition, over age 65, etc.)?

- ☐ Yes
- ☐ No
- ☐ Unsure



In 2019, I traveled domestically / internationally:

- ☐ 1-3 times
- ☐ 4-6 times
- ☐ More than 6 times
- ☐ I did not travel in 2019

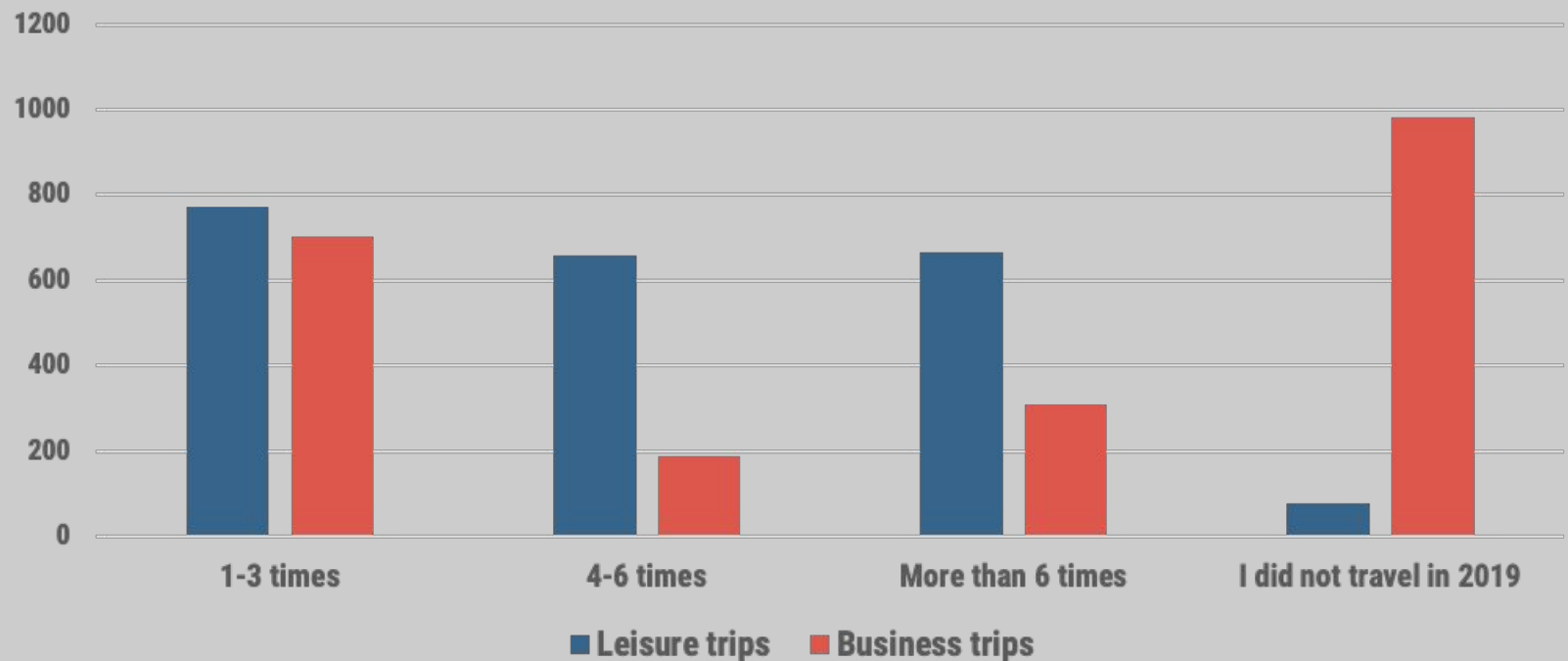


## Appendix | Additional survey questions

In 2019, I traveled for business/leisure:

- ☐ 1-3 times
- ☐ 4-6 times
- ☐ More than 6 times
- ☐ I did not travel for business/leisure in 2019

### Self-reported frequency of leisure and business trips in 2019



## "How will the effects of the coronavirus crisis impact your ability or willingness to travel for leisure in the future?"

■ 5 (major impact) ■ 4 ■ 3 ■ 2 ■ 1 (no impact)

