



provoke
insights

Hospitality & Tourism

July, 2020



Background & Objectives

Over the last three months, daily habits and routines have been uprooted. The impact that these shifting behaviors are going to have is unknown, so far. As we enter the post COVID world, consumers will have new brand expectations. The question is, will current patterns and practices become permanent? The global pandemic has had an impact on every industry, and hospitality and tourism are no exception.

Provoke Insights works in a variety of industries, from technology and finance to food and luxury – the firm decided to launch a research initiative to understand the effects that the first half of 2020 has had on the consumer.

The goal of the research was to gain a national perspective on the mindset of consumers and what changes they have made in their behavior. The study covered over 15 industries and looked at general consumers as well as professionals.

The objectives of the research include:

1. Understanding consumer behavior pre-, during, and post-COVID-19.
2. Gaining feedback on shifting mindset/attitudes from March 2020 to when restrictions are lifted.

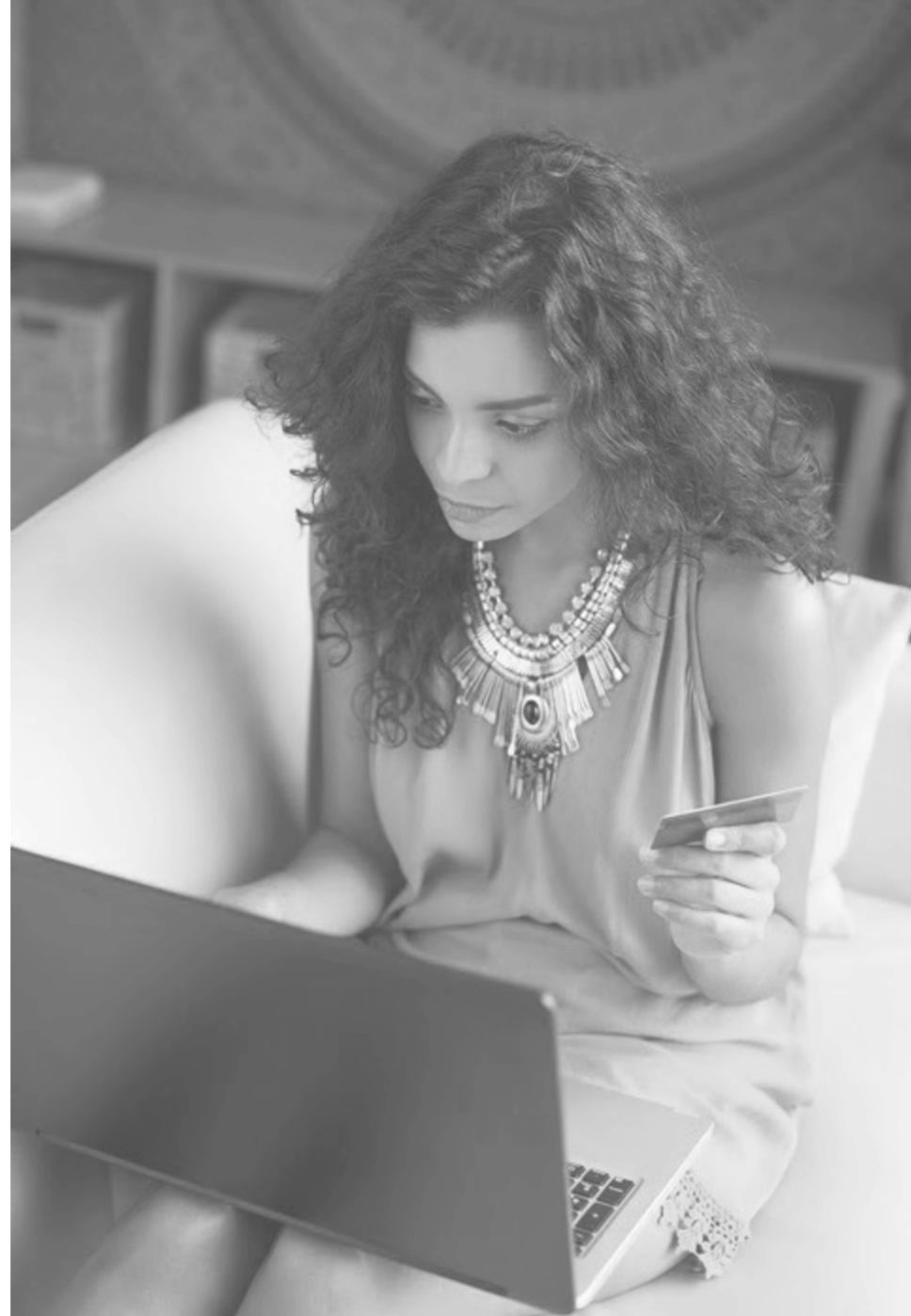
Methodology

Provoke Insights conducted a 10-minute survey among 600 U.S. consumers between the ages of 21 and 65. The study was in-field from June 5th to June 15th, 2020.

Sampling was matched to reflect 2019 U.S. Census data¹. A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, and children in the household).

Statistical differences between subgroups were tested at a 95% confidence level. Capital letters in the report are shown to indicate statistically significant differences between groups.

¹ <https://data.census.gov/cedsci/table?q=general%20population&tid=ACSDP1Y2018.DP05&vintage=2018>



Overview



While tourism has been halted due to the pandemic, people are ready to travel again. Coronavirus has not stopped Americans from scheduling their vacations for next year.

The tourism industry's positive outlook is likely due to 72% of Americans being optimistic about the future.



When it comes to travel plans, families with children are more likely to go on vacation regardless of type. Those who are in relationships are also more likely to travel.



Men traveled more than women last year. However, in the next year, this will shift. Men are planning to travel less, and women planning to travel more, vacation plans between the two genders will be about equal.

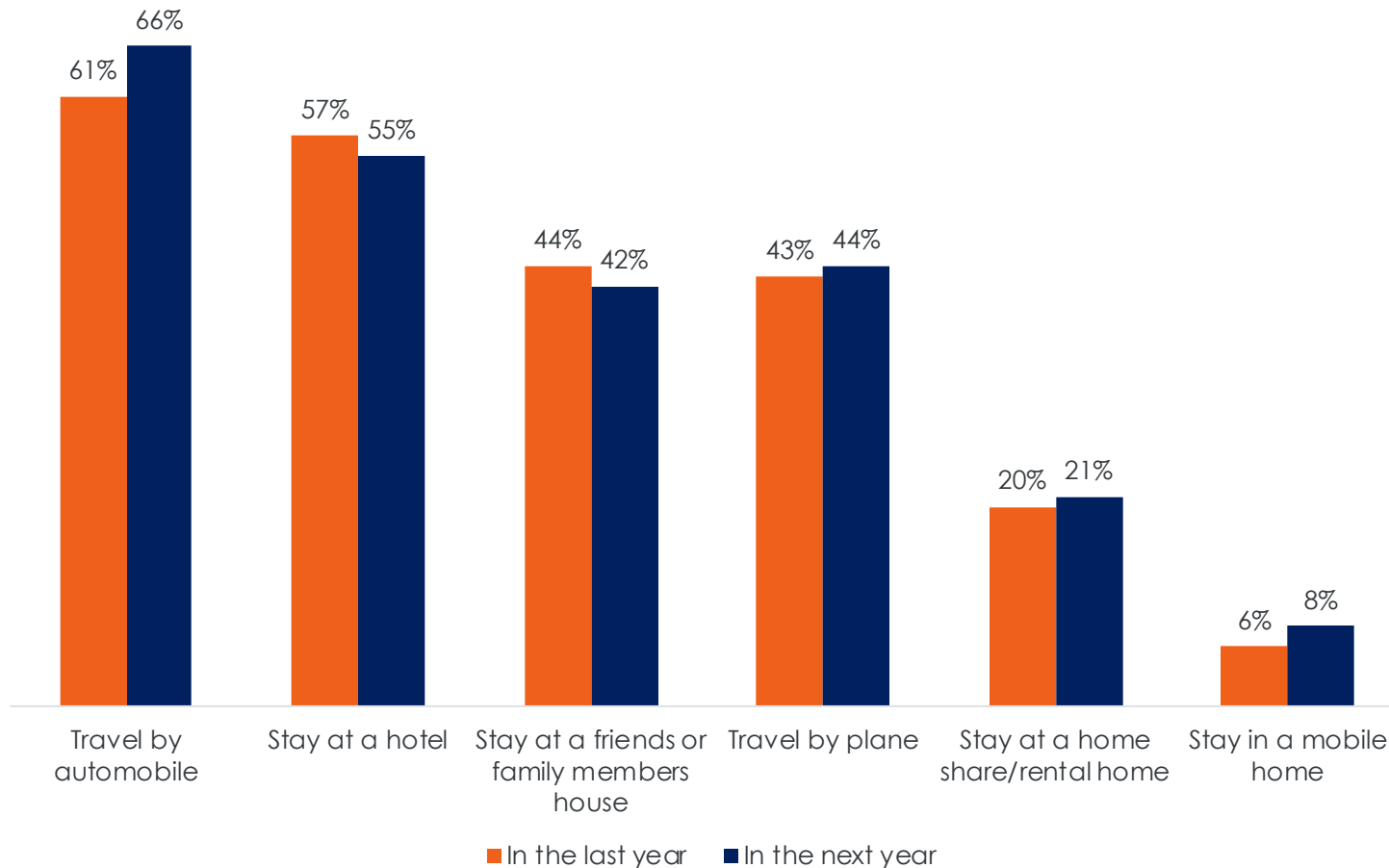


Travel plans vary by geography and area. Americans in the West are more likely to fly than those in the rest of the country.

Also, those living in urban areas are more likely to plan to travel by plane, while rural and suburban Americans will more likely visit by automobile.

Changing Vacation Habits

Coronavirus has not stopped Americans from planning to travel in the next year.



72%

are optimistic about the future

Top 2 – Very optimistic/Moderately optimistic

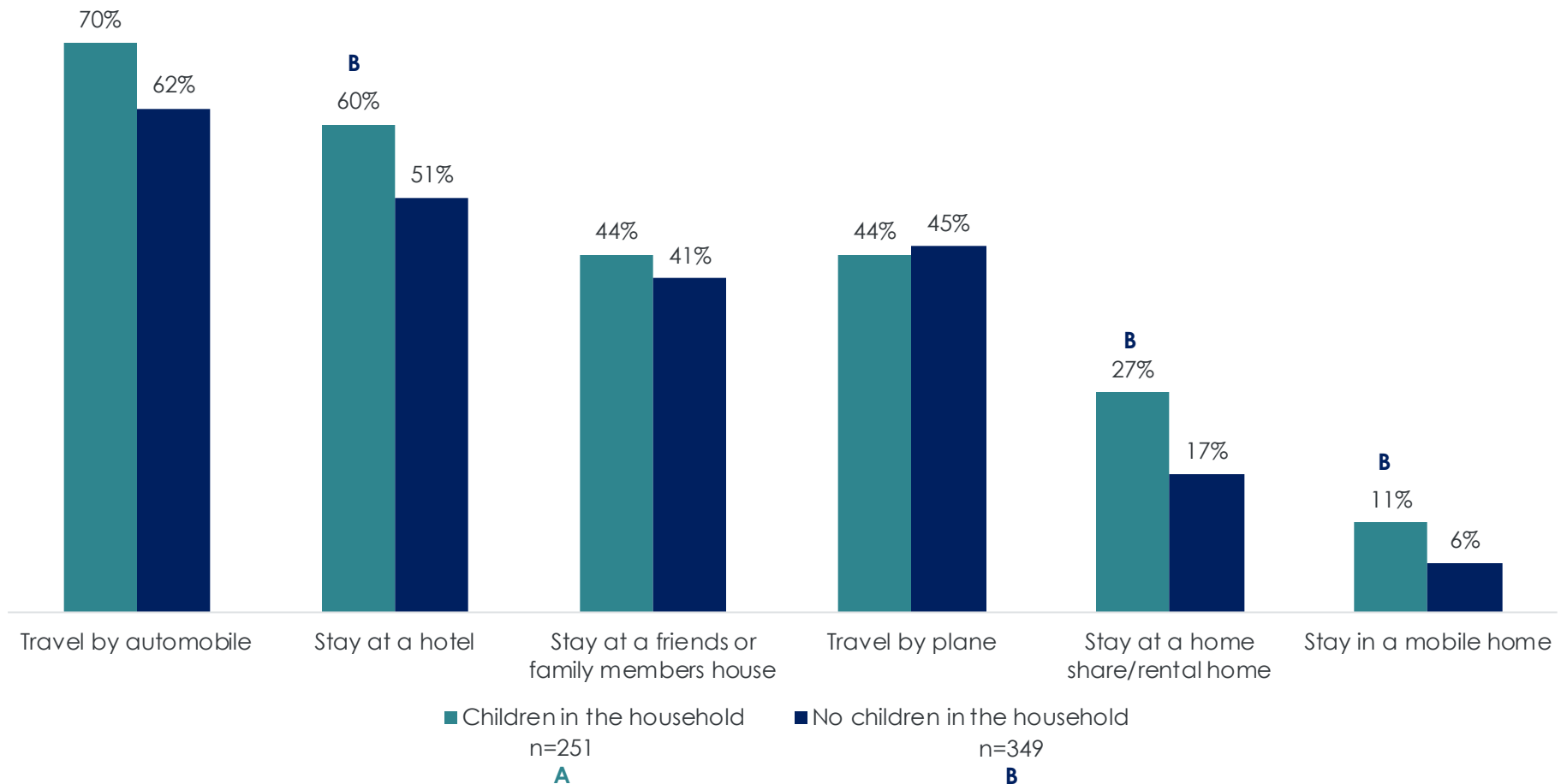
Q. How optimistic are you for the future?

Base: All qualified respondents: N=600

Family Travel Plans

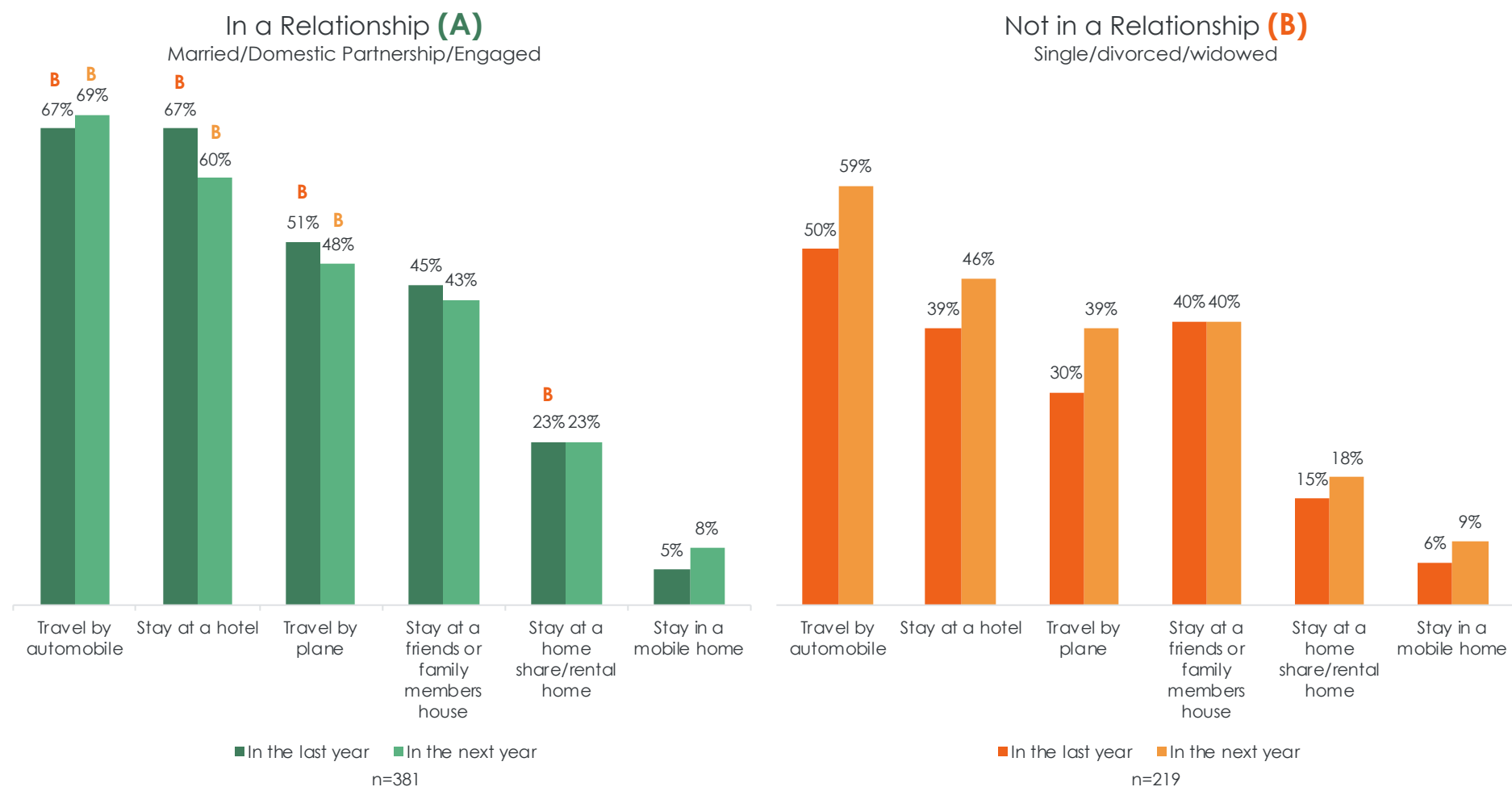
Across the board, families are planning to travel more than households with children.

Plan to Travel in the Next Year



Travel Plans by Relationship Status

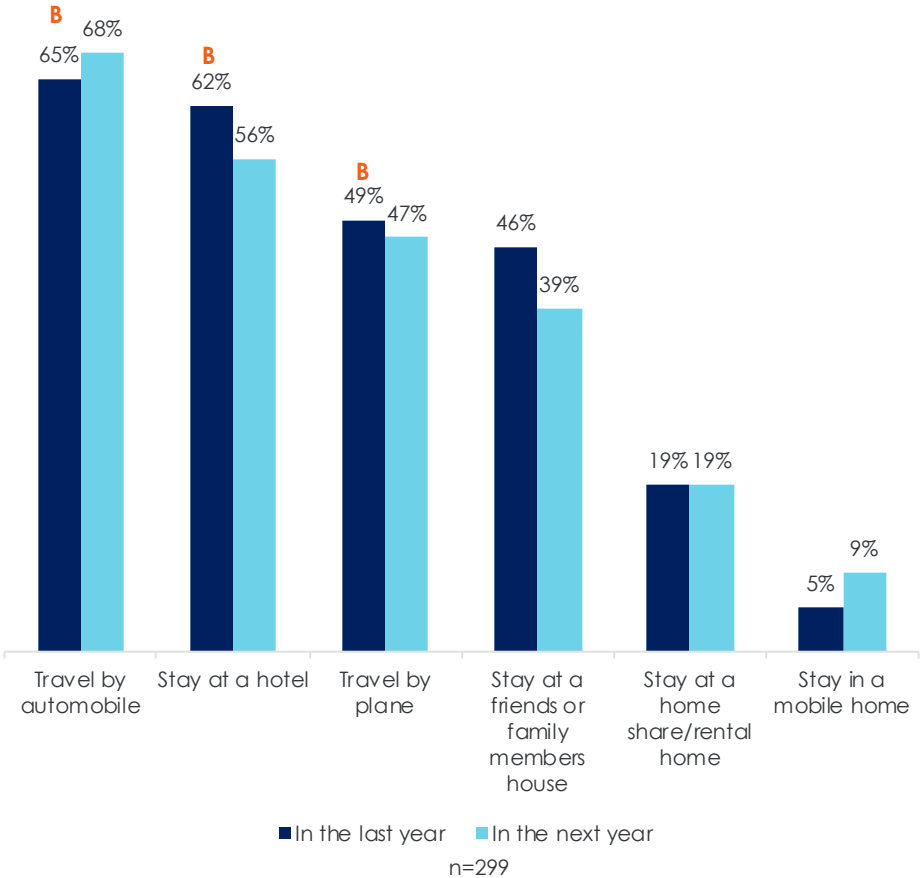
Those in a relationship are more likely to travel than those who are not in a relationship. However, those not in a relationship are planning to travel more often than they did in the past.



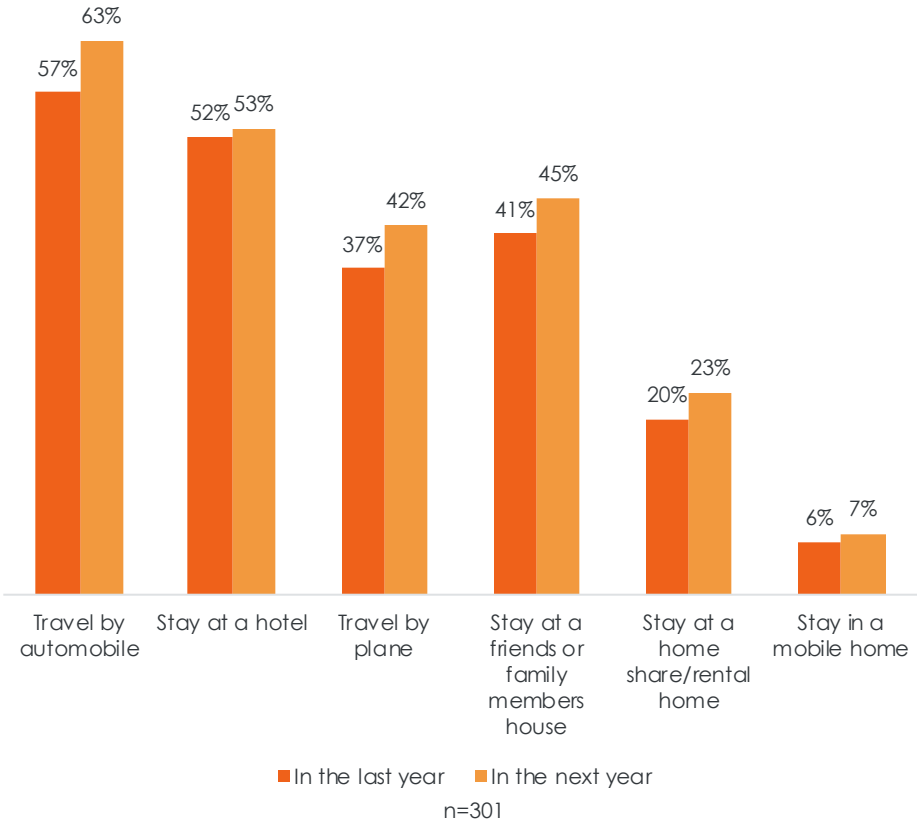
Travel Plans by Gender

Last year, men were more likely to travel than women. However, in the next year, the number of men planning to travel will drop. Men are now more aligned with their female counterparts regarding travel, as women plan to travel more in the next year.

Male (A)



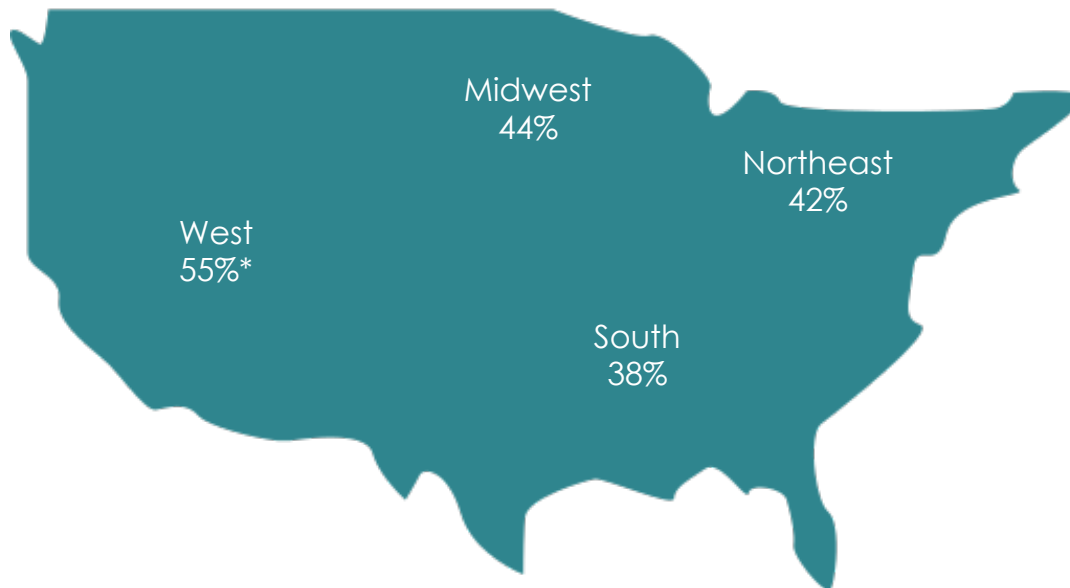
Female (B)



Flying by Region

Americans living in the Western United States are more likely to fly next year.

Fly in the last year – Fly in the next year

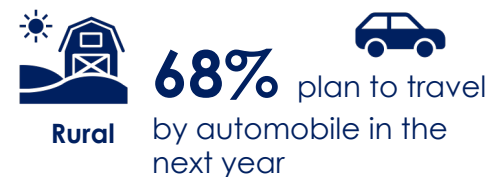
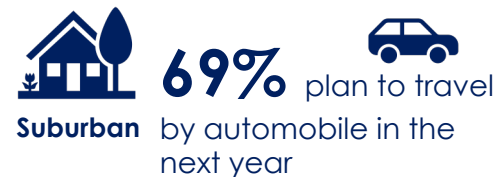


*Significant difference



Travel Plans by Area

Rural and suburban Americans are more likely to travel by car, while those living in urban areas plan to travel by plane.



Get in Touch

For further information on this data, click [here](#), e-mail info@provokeinsights.com, or reach out to Rachael Ryan (rachael.ryan@provokeinsights.com).

Please note: the data can be broken up by the following attributes to understand each category further:



Gender



Geographical
Area



Household
Income



Generations



Marital Status



Economic
Beliefs



Employment
Status



Children in
Household



Optimism for
the Future