

May 13, 2020

Wave 2

- Fielded May 2 through 5
- 558 respondents
- Respondents sourced via an online list/panel fit the following requirements:
 - Stayed in paid accommodation for leisure travel at least once in 2019
 - Have \$50K or more in household income



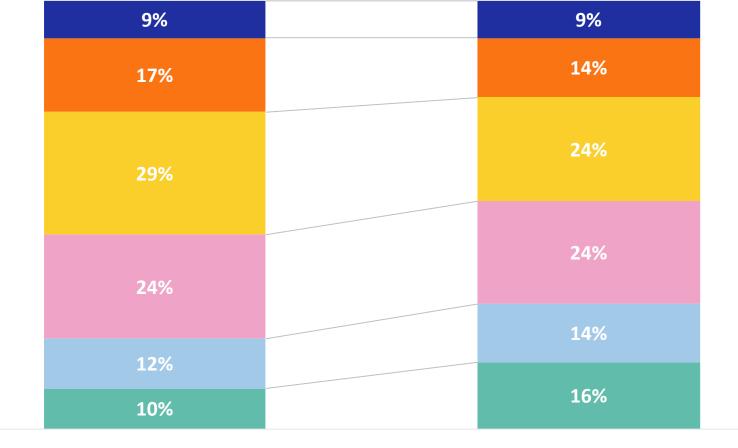
Executive Summary – Wave 2 versus Wave 1

- Overall stress levels seem to be coming down for many travelers, but that is not yet translating into greater expectations regarding the number of trips they'll take in 2020
- Their concerns remain significant, though they may be diminishing slightly
- But they have not lost interest their consumption of many sources of travel information and inspiration appears to be increasing
- There is a sizable segment of travelers actively planning travel and expecting to vacation this summer
- Nearly half of Ready to Go! travelers those who intend to travel as soon as restrictions are lifted and/or it is widely approved to do so – expect to vacation this summer
- They do have concerns, but most seem to be decreasing
- And Ready-to-Go travelers are increasing their planning, information gathering and travel inspiration activities



Wave 2: Are Travelers Adjusting to a New Normal?

Overall stress levels seem to be coming down for many travelers.



Which of the following best describes your overall mood these days?

Extremely stressed

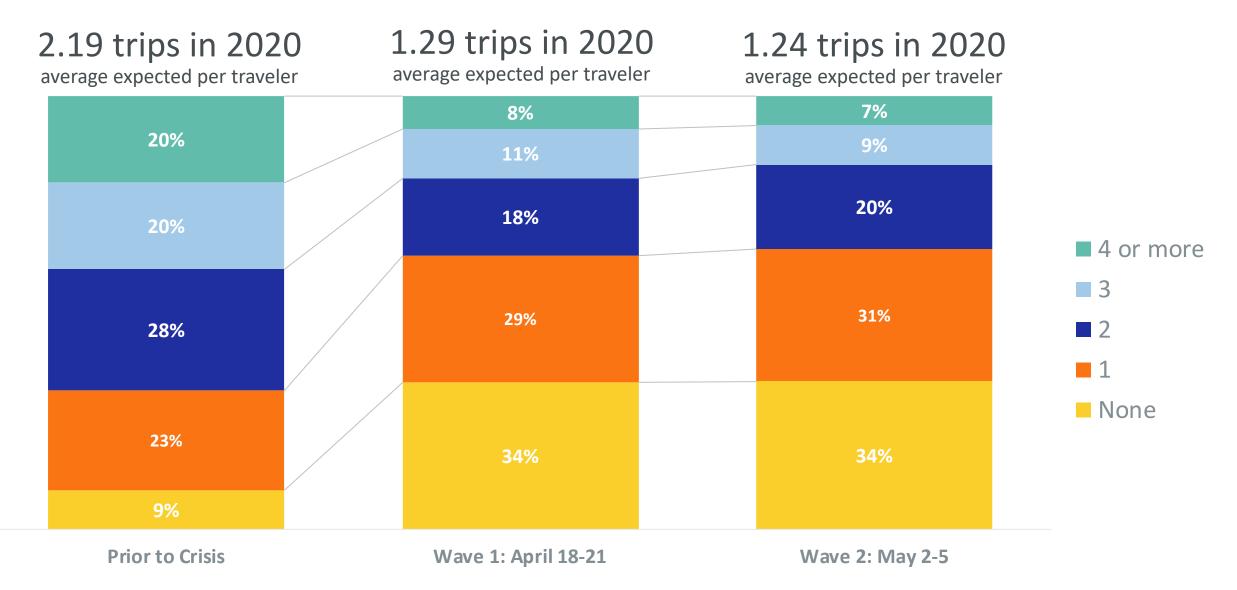
- Very anxious
- Worried but not overly anxious
- Occasionally or mildly worried
- Frustrated but not worried
- Content/not worried



Wave 2: May 2-5



That lower stress level, however, is not translating into greater expectations regarding number of trips they'll take in 2020.



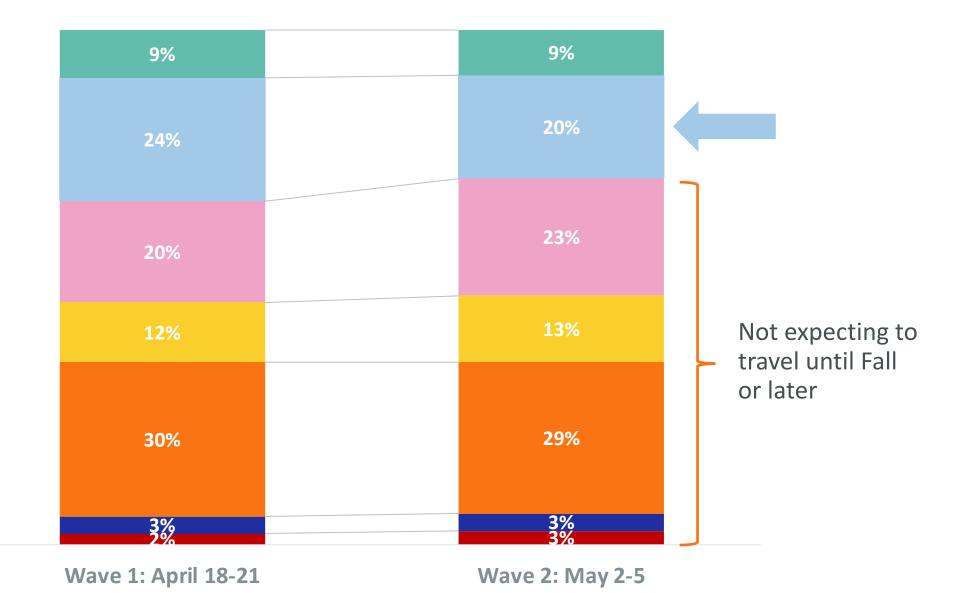


Prior to crisis, asked during Wave 1: "Before Coronavirus was a serious concern, how many vacations did you have planned for 2020?" Waves 1 and 2: "At this point, how many vacations or leisure trips do you expect you will take in 2020?"

More travelers are losing hope for their 2020 summer vacations.

How long do you think it will be before you vacation again?

- Before Summer 2020
 Not until Summer 2020
 Not until Fall 2020
 Not until the Holidays 2020
- Not until 2021
- Not until 2022
- Maybe never





There is a small but growing segment of travelers who believe they may never feel comfortable vacationing again.

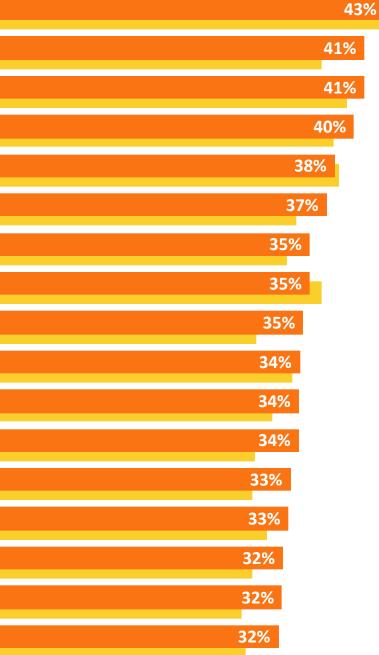
17%	18%	When do you expect you will feel	
26%	26%	 comfortable vacationing again? As soon as travel restrictions are lifted As soon as non-essential travel is widely approved 	
46%	42%	 As soon as a vaccine is available Maybe never Other 	
7% 4%	12% 3%		



Wave 2: May 2-5

But travelers have not lost interest – their consumption of many sources of travel information and inspiration appears to be increasing.

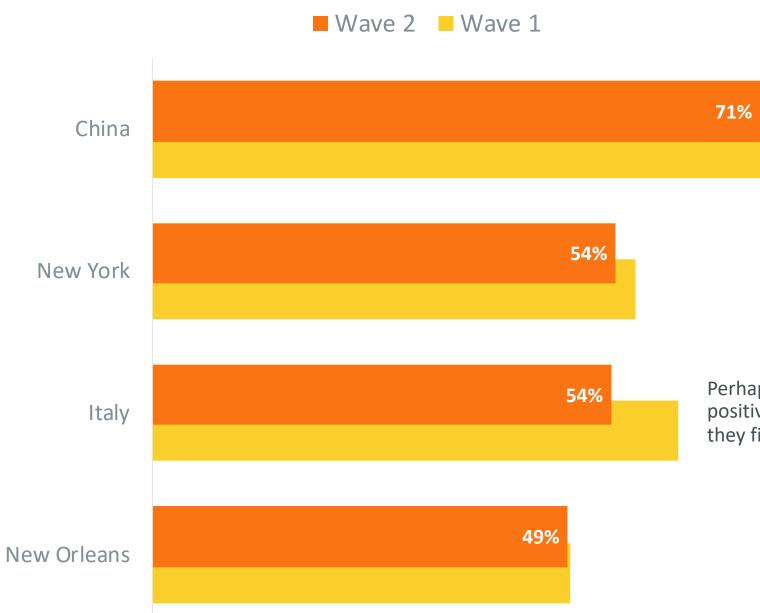
Talking with friends/family about trips Watching TV shows that scratch my travel itch Planning future trips Watching movies that scratch my travel itch Searching for travel information online Seeking travel inspiration on social media... Reading destinations' visitor guides Watching Youtube videos that scratch my travel itch **Browsing TripAdvisor** Looking at tourism websites Browsing Expedia or similar sites for flights and hotels Reading travel emails/enewsletters **Reading travel blogs** Reading travel magazines Reading books that scratch my travel itch Browsing AirBnB.com Taking virtual tours





Wave 2

Wave 1



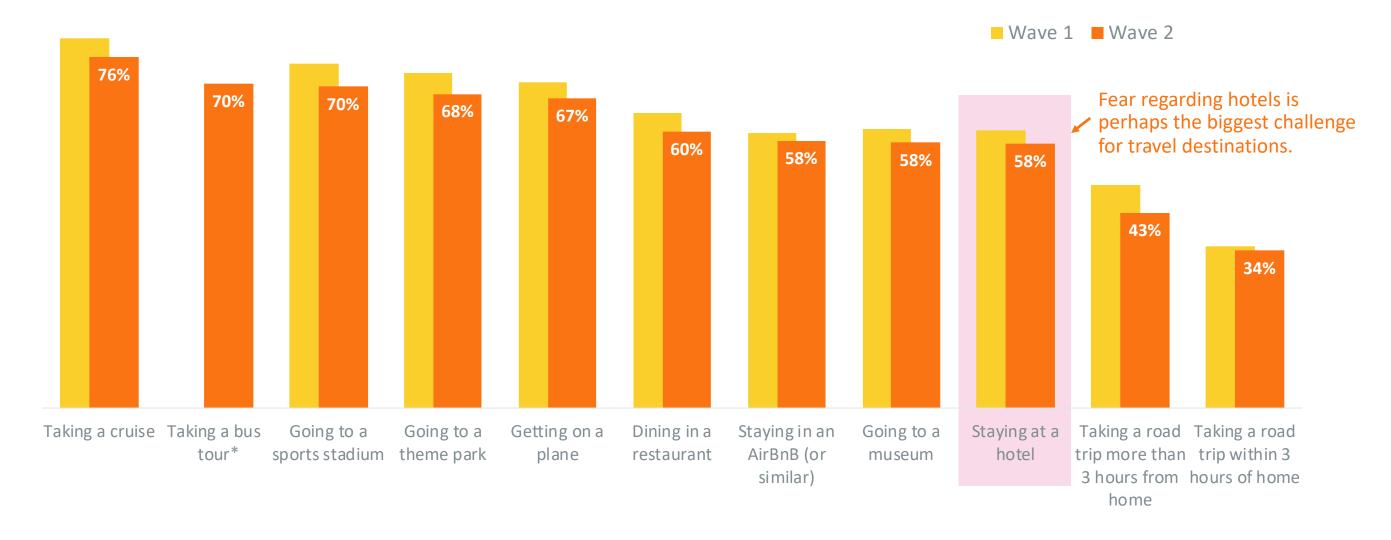
There's hope that even the hardest-hit tourism destinations can recover.

Perhaps starting to recover with promising COVID19 data and some positive PR, Italy even has a growing minority of travelers reporting they find the destination more appealing now than they did in 2019.



Q: "Compared to how you felt in 2019, how appealing are the following destinations?" A: "Much less appealing" or "A little less appealing"

Travelers' concerns are still significant, but may be diminishing slightly.

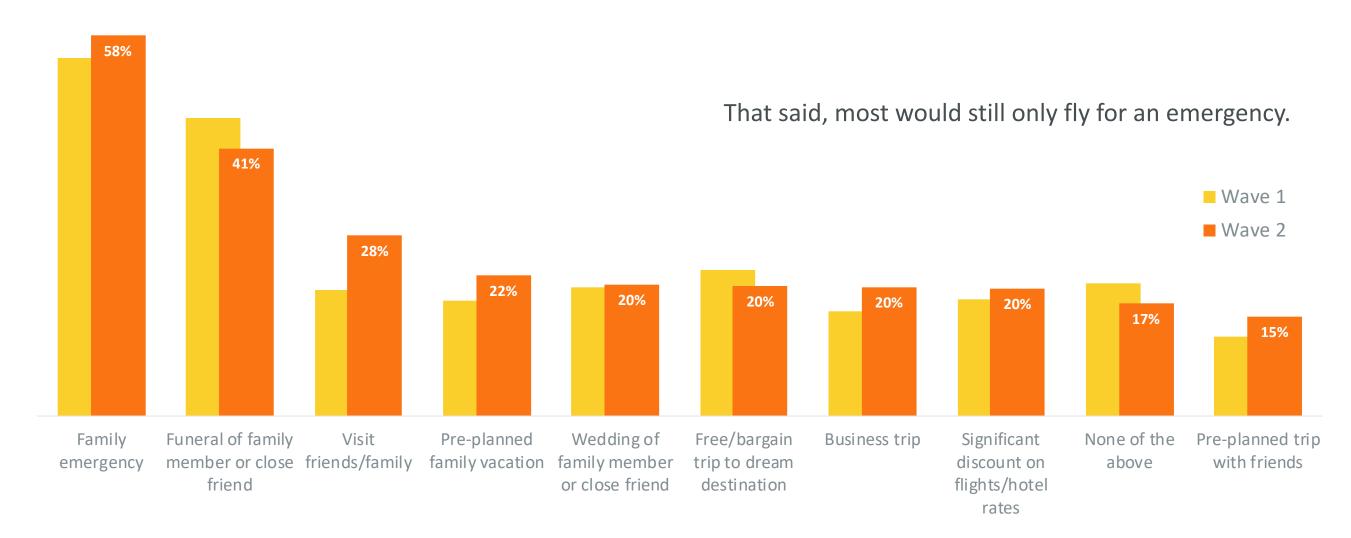




Q: If it was possible to do it right now, how concerned would you be about ____? A: 4 or 5 on a scale of 1 to 5, 5 being most concerned.

*Wave 1 did not include the question about bus tours.

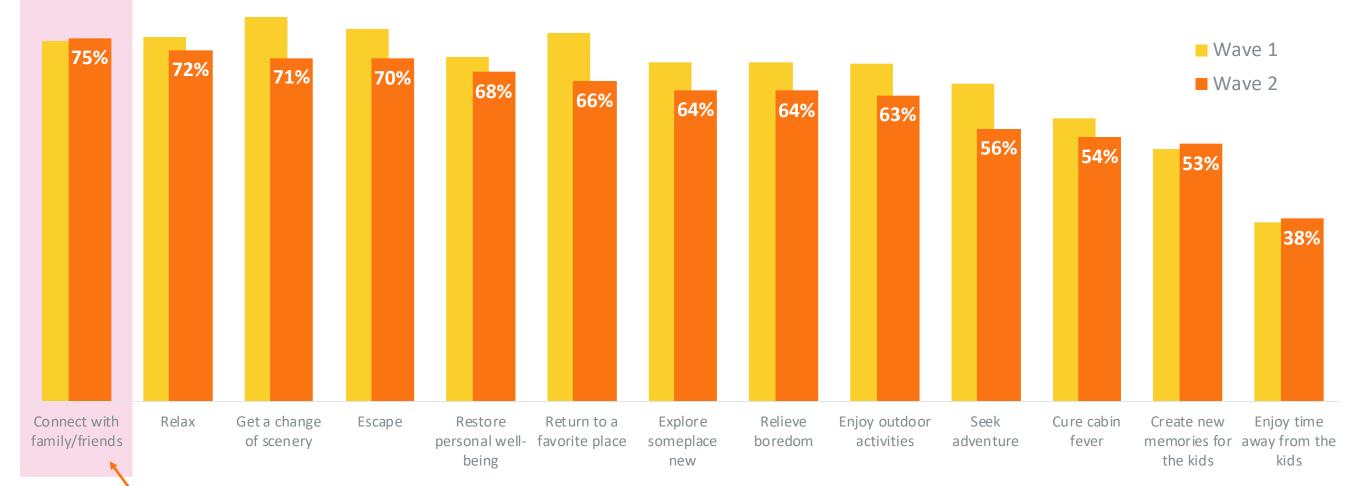
Travelers are starting to find it easier to envision getting on a plane, especially to be with family and friends.





But they are	Concerns about safety on cruise ships	789
still limited by	Concerns about safety in planes	73%
their	Travel restrictions	72%
concerns.	Concerns about safety once I reach my destination	70%
	Concerns about safety in airports	70%
	Concerns about safety on buses*	70%
	Concerns about safety at attractions like theme parks	68%
Q: To what degree are the following likely to limit your travel this year?	Social distancing requirements	68%
A: 4 or 5 on a scale of 1 to 5, with 5	Concerns about safety at attractions like museums	62%
being most likely.	Concerns about safety in hotels	62%
	Concerns about safety in AirBnBs or other rentals	60%
Wave 2	Concerns about safety when renting cars	54%
Wave 1	Financial concerns	50%
	Concerns about safety at gas stations or rest stops	47%
*Ways 1 did not include the question about hus	Change in school schedules	42%

And most of their travel motivations seem to be diminishing somewhat.



Connecting with family and friends is now the #1 motivator.

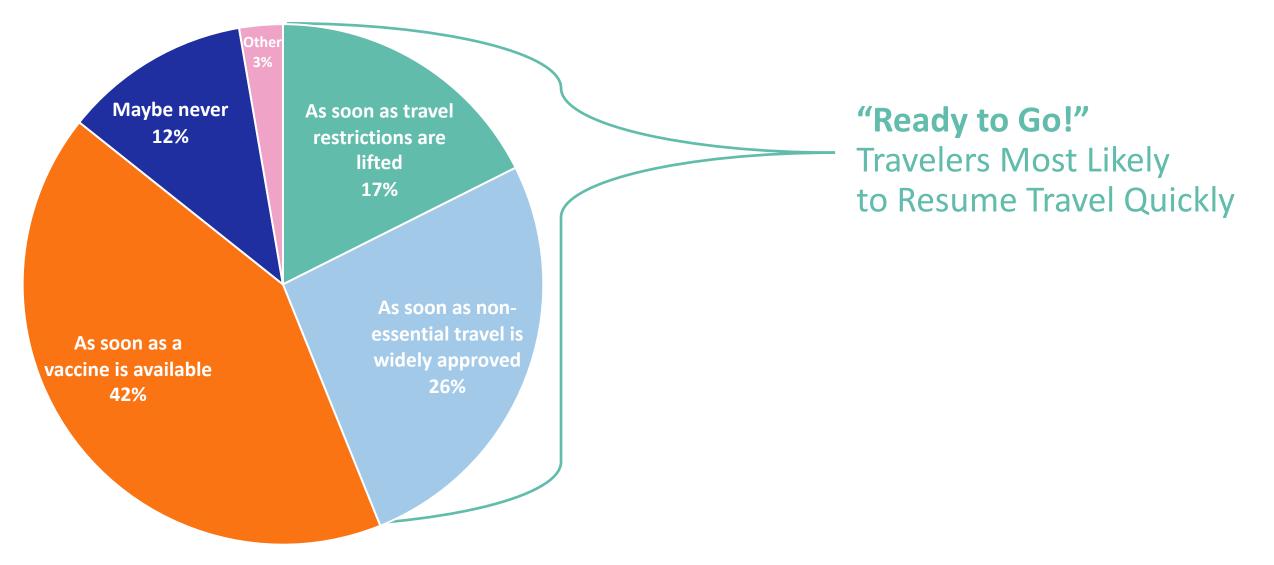


Q: What are the reasons you will be eager to travel once restrictions lift? *A*: 4 or 5 on a scale of 1 to 5, 5 being a very strong motivator.

It may be that travelers are growing resigned to a long wait to get back to their old travel habits.

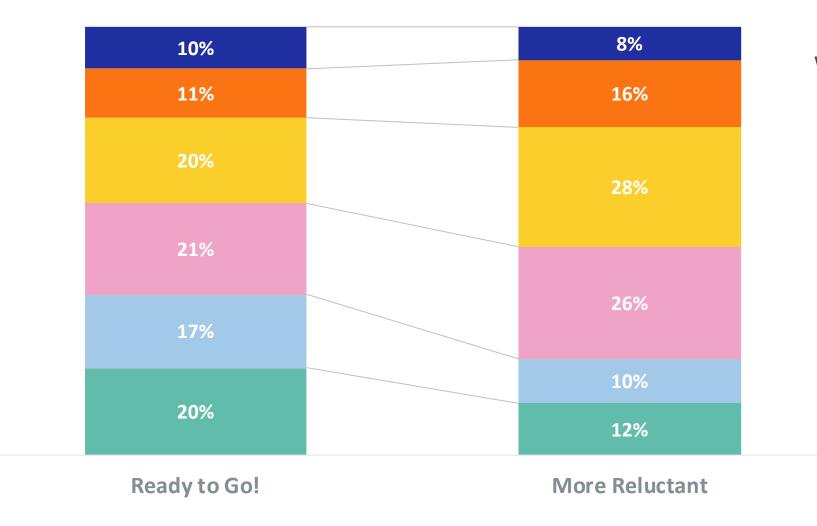
Wave 2: Many Travelers are Ready to Vacation Again!

Similar to Wave 1, 44% of Wave 2 travelers surveyed said they will feel comfortable vacationing as soon as non-essential travel is widely approved, if not before.





Travelers who report they will resume travel once it's widely approved remain – overall – less stressed than more reluctant travelers.



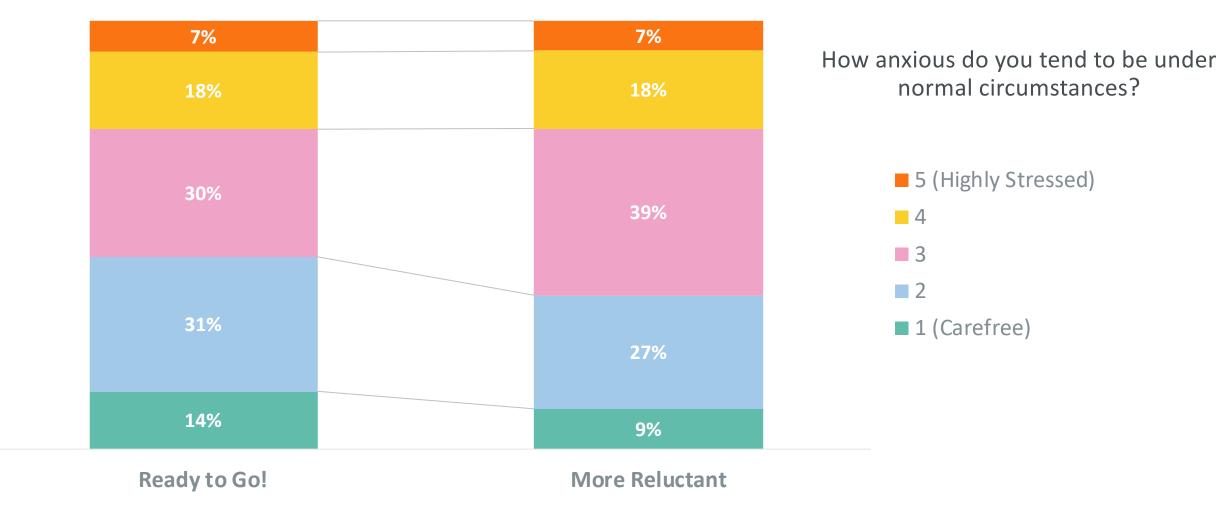
Which of the following best describes your overall mood these days?

Extremely stressed

- Very anxious
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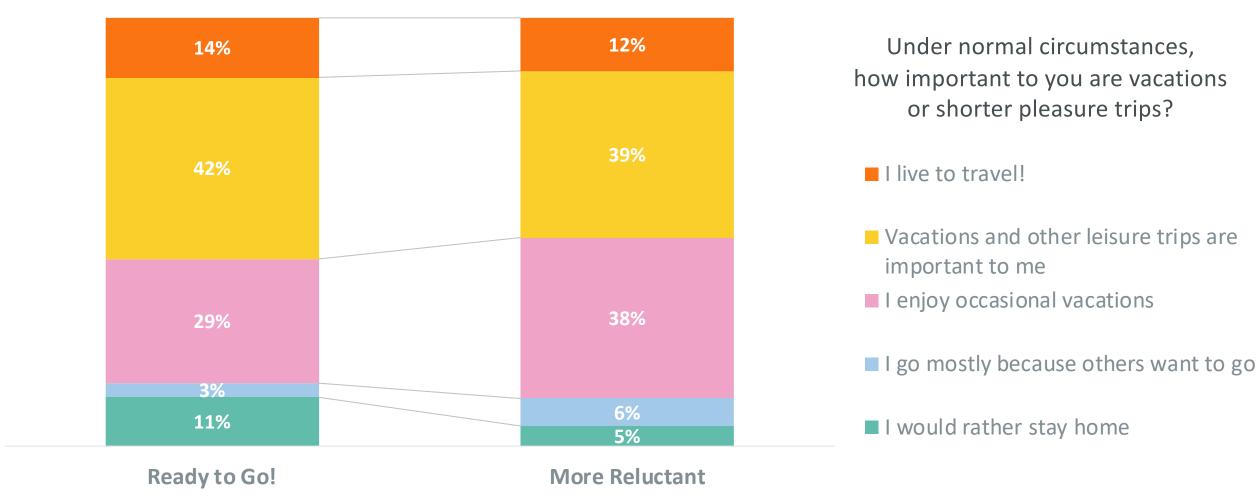


Ready to Go! travelers tend to be less stressed under normal circumstances as well.



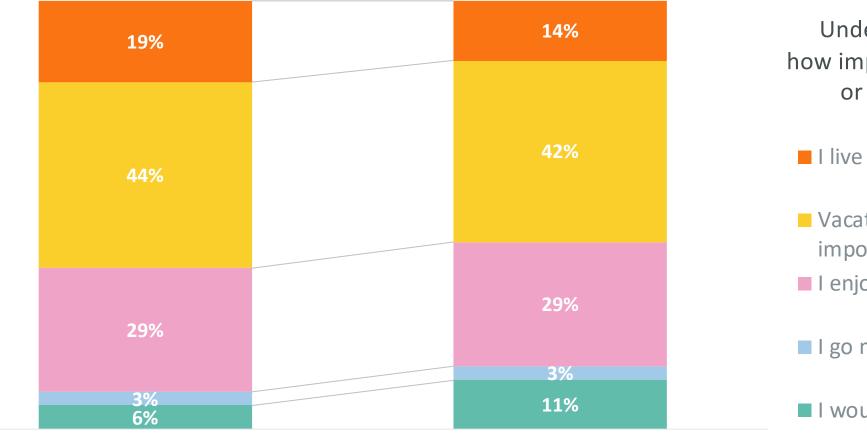


They may be slightly more likely to be avid travelers.





It is possible that recent experiences have shifted the way Ready to Go! travelers think about the role of travel in their lives.



Under normal circumstances, how important to you are vacations or shorter pleasure trips?

- I live to travel!
- Vacations and other leisure trips are important to me
- I enjoy occasional vacations
- I go mostly because others want to go
- I would rather stay home

Wave 1



Still, nearly half of Ready to Go! travelers expect to vacation this summer.





They do have 73% Concerns about safety on cruise ships concerns, but most 67% Travel restrictions seem to be 65% Concerns about safety on buses decreasing. 64% Concerns about safety in planes 59% Concerns about safety once I reach my destination 58% Concerns about safety at attractions like theme parks 57% Social distancing requirements Q: To what degree are the following 56% Concerns about safety in airports likely to limit your travel this year? 51% A: 4 or 5 on a scale of 1 to 5, with 5 Concerns about safety at attractions like museums being most likely. 49% Concerns about safety in hotels 49% Concerns about safety in AirBnBs or other rentals 48% Concerns about safety when renting cars Wave 2 Wave 1 46% **Financial concerns** 39% Concerns about safety at gas stations or rest stops 39% Change in school schedules



And they are increasing their planning, information gathering and travel inspiration activities.

Wave 2

Wave 1

5	Planning future trips
50	Talking with friends/family about trips
47%	Searching for travel information online
43%	Watching TV shows that scratch my travel itch
43%	Watching movies that scratch my travel itch
42%	Seeking travel inspiration on social media (Facebook)
42%	Looking at tourism websites
41%	Reading travel emails/enewsletters
41%	Browsing TripAdvisor
40%	Browsing Expedia or similar sites for flights and hotels
39%	Reading destinations' visitor guides
38%	Browsing AirBnB.com
38%	Reading travel blogs
38%	Watching Youtube videos that scratch my travel itch
37%	Reading travel magazines
37%	Reading books that scratch my travel itch
36%	Taking virtual tours
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3%

There is a sizable segment of travelers actively planning travel and expecting to vacation this summer.



