



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings
October 27th, 2020

Destination  Analysts



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Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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- Brand Performance
- Visitor Activity Analysis & Segmentation
- Persona Research
- Resident + Stakeholder Research
- Advertising Testing
- Grant Support

info@destinationanalysts.com



RESEARCH OVERVIEW & METHODOLOGY

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 33 data (fielded October 23th-25th) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S.Regions



Independent Unbiased Research



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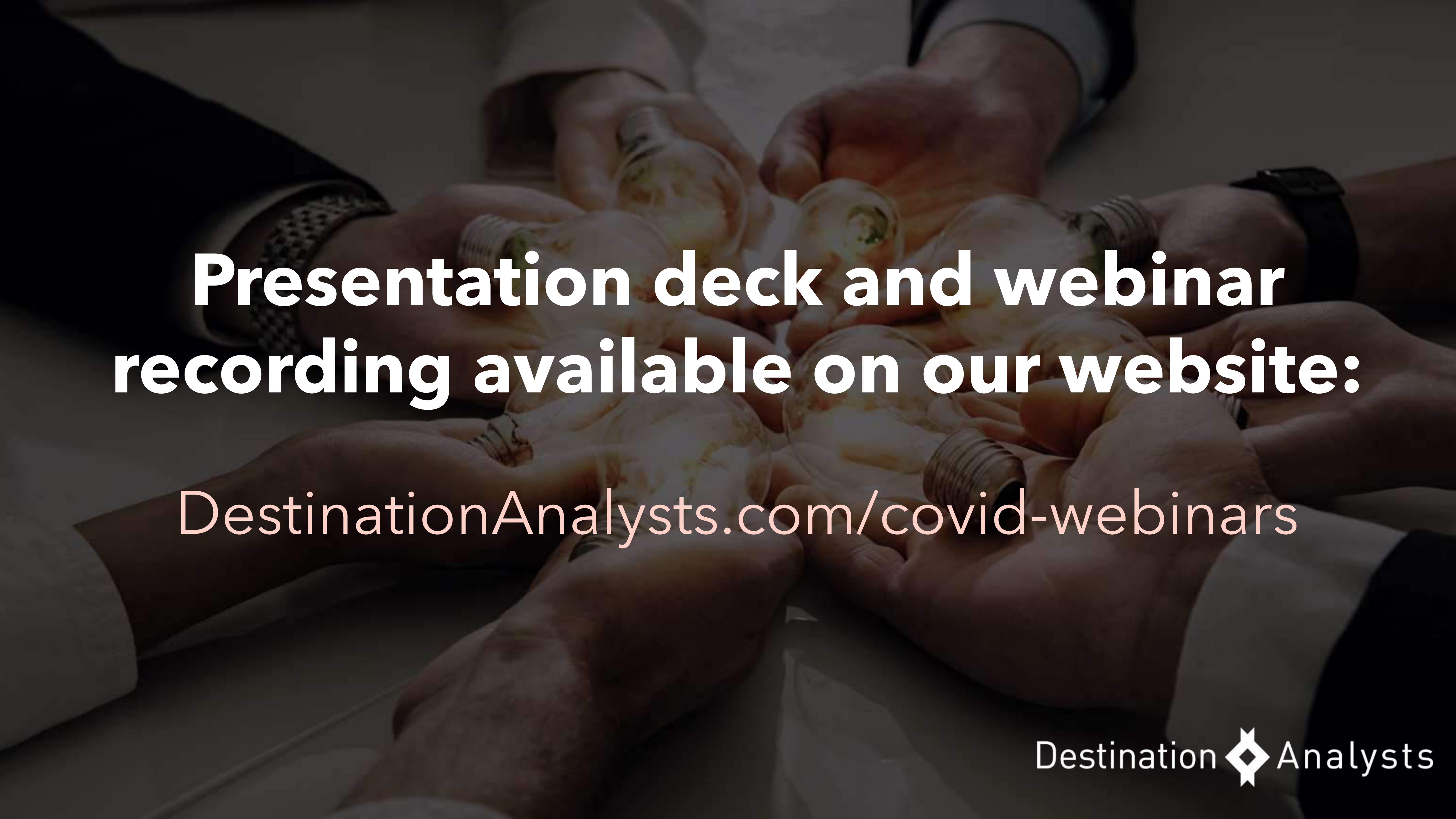
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**Do you have a survey topic you
want us to explore?**

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**



**Presentation deck and webinar
recording available on our website:**

DestinationAnalysts.com/covid-webinars

15-minute presentations for your board and stakeholders

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THE STATE OF THE INTERNATIONAL TRAVELER



Coronavirus cases break records as states around U.S. reel under surge

Nicole Acevedo and The Associated Press • 7 mins ago



As the United States set records for the number of new [coronavirus](#) cases, states in every part of the country are reeling under the surge.



© Provided by NBC News

Two back-to-back daily records for single-day increases in U.S. [cases](#) were set on Friday, with 79,303 new cases, and on Thursday with 77,640, according to NBC News' tally. The previous high of 75,723 was set July 29.

TOTAL CASES

8,469,976

+82,929 New Cases

CASES IN LAST 7 DAYS PER 100K

19.1

TOTAL DEATHS

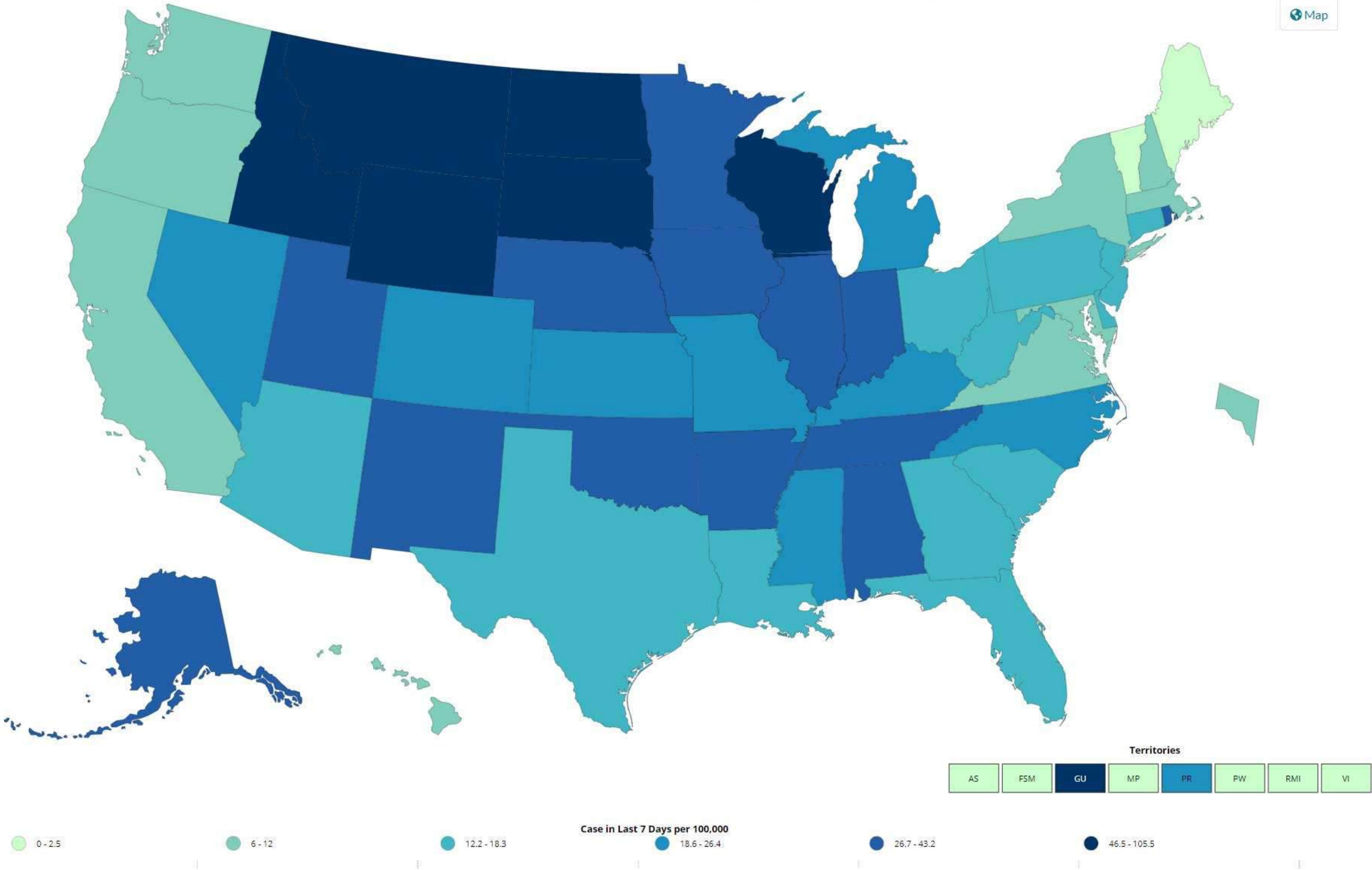
223,393

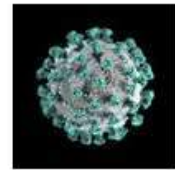
+946 New Deaths

CDC | Updated: Oct 24 2020 12:16PM

US COVID-19 Case Rate Reported to the CDC in the Last 7 Days, by State/Territory (cases per 100K)

Map





Coronavirus Updates



THE CORONAVIRUS CRISIS

Europe Imposes New Restrictions As COVID-19 Cases Soar

October 25, 2020 - 7:52 PM ET

KAT LONSDORF



A waiter cleans a table this month after closing in St. Germain-en-Laye, west of Paris, to comply with COVID-19 restrictions forcing restaurants in the French capital to close. France has imposed a nighttime curfew in Paris and other major cities to curb the spread of the coronavirus.

Michel Euler/AP

New regulations and social distancing rules are being introduced across multiple European countries in an attempt to stop the spread of the coronavirus as a second wave of the pandemic accelerates across the continent. Europe reported more than 1.3 million new cases this past week, its highest single week count yet, according to the World Health Organization.

Spain and France each surpassed 1 million cumulative confirmed cases last week, becoming the sixth and seventh countries to do so globally. Italy, Germany, Belgium, the Czech Republic and the United Kingdom are also experiencing record numbers — threatening to overwhelm countries' abilities to test, trace and contain the virus. Polish

Health

Moderna's coronavirus vaccine trial is fully enrolled, 37 percent of participants are minorities

The company anticipates that it may have sufficient data to seek a regulatory OK in November.



[Moderna](#), the biotechnology firm partnering with the National Institutes of Health to develop a [coronavirus vaccine](#), announced Thursday that it has fully enrolled its trial, with 30,000 participants — more than a third of whom are [minorities](#).

The [coronavirus](#) vaccine trials have been closely watched to ensure they reflect the [diversity](#) of the U.S. population at a minimum, and Moderna's enrollment was slowed in September to recruit more minorities. A fifth of the participants are Hispanic and 10 percent are Black, according to data released by the company. People over 65, a population also at high risk for coronavirus, make up 25 percent of the study population.

"I think that we have done quite well — I think the demographics of the Moderna trial have markedly changed," Larry Corey, a virologist at Fred Hutchinson Cancer Research Center said in an interview last week. Corey is heading up the clinical trials under Operation Warp Speed, the federal effort to speed vaccine development.

The New York Times

After pausing for safety concerns, AstraZeneca and Johnson & Johnson have resumed their U.S. vaccine trials.



By Katherine J. Wu and Carl Zimmer

Published Oct. 23, 2020 Updated Oct. 24, 2020, 3:28 p.m. ET



Late-stage coronavirus vaccine trials run by AstraZeneca and Johnson & Johnson have resumed in the United States after the companies said Friday that serious illnesses in a few volunteers appeared not to be related to the vaccines.

Federal health regulators gave AstraZeneca the green light after a six-week pause, concluding there was no evidence the experimental vaccine had directly caused neurological side effects reported in two participants. The AstraZeneca news was first reported by The [Wall Street Journal](#).

Johnson & Johnson said that its trial, which had been on pause for 11 days, [would restart](#) after a company investigation determined that a "serious medical event" in one study volunteer had "no clear cause." To maintain the integrity of the trial, the company said, it did not check whether the volunteer received the vaccine or the placebo.



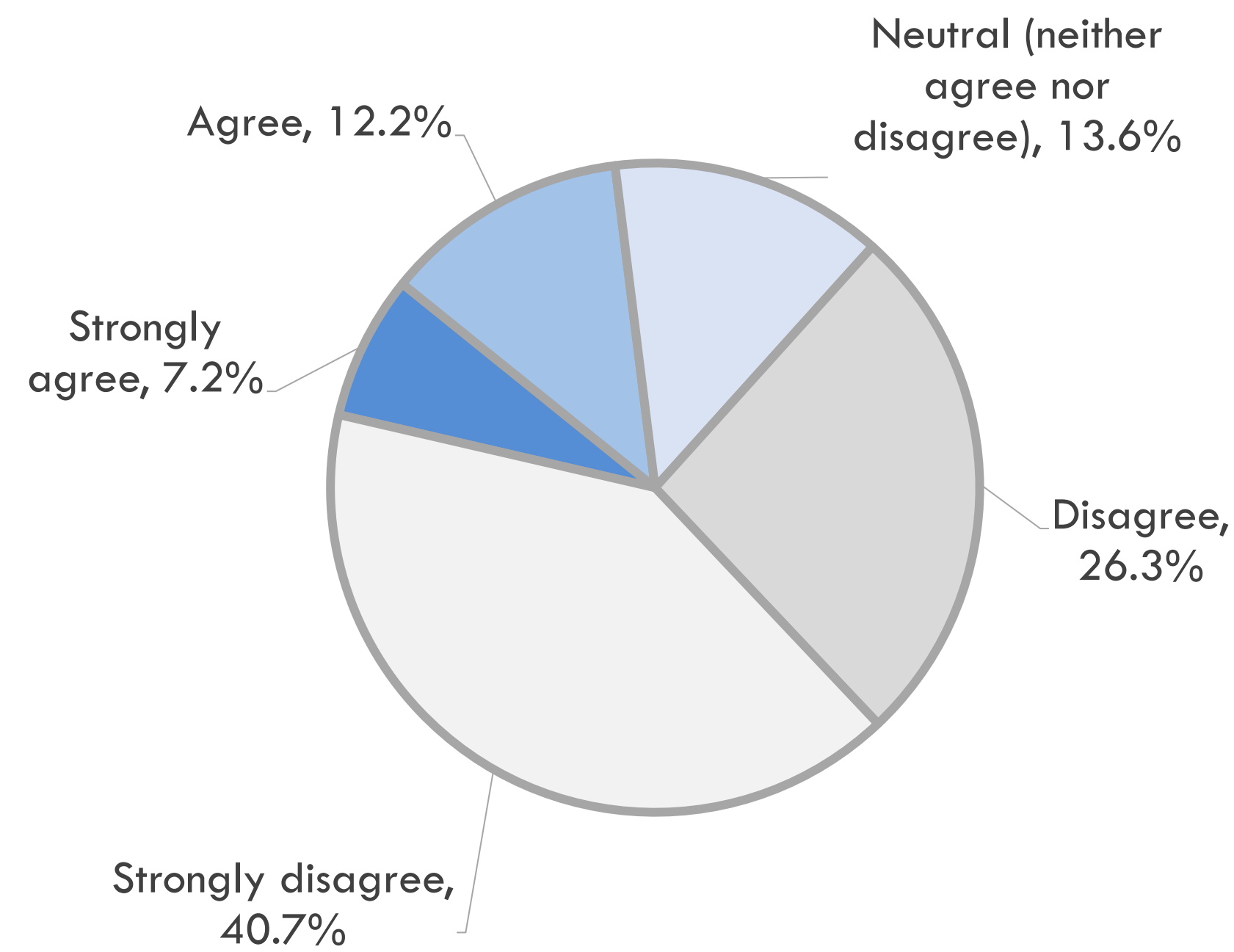
Travelers' Current Mood



EXPECTATIONS FOR THE PANDEMIC'S COURSE AT THE END OF 2020

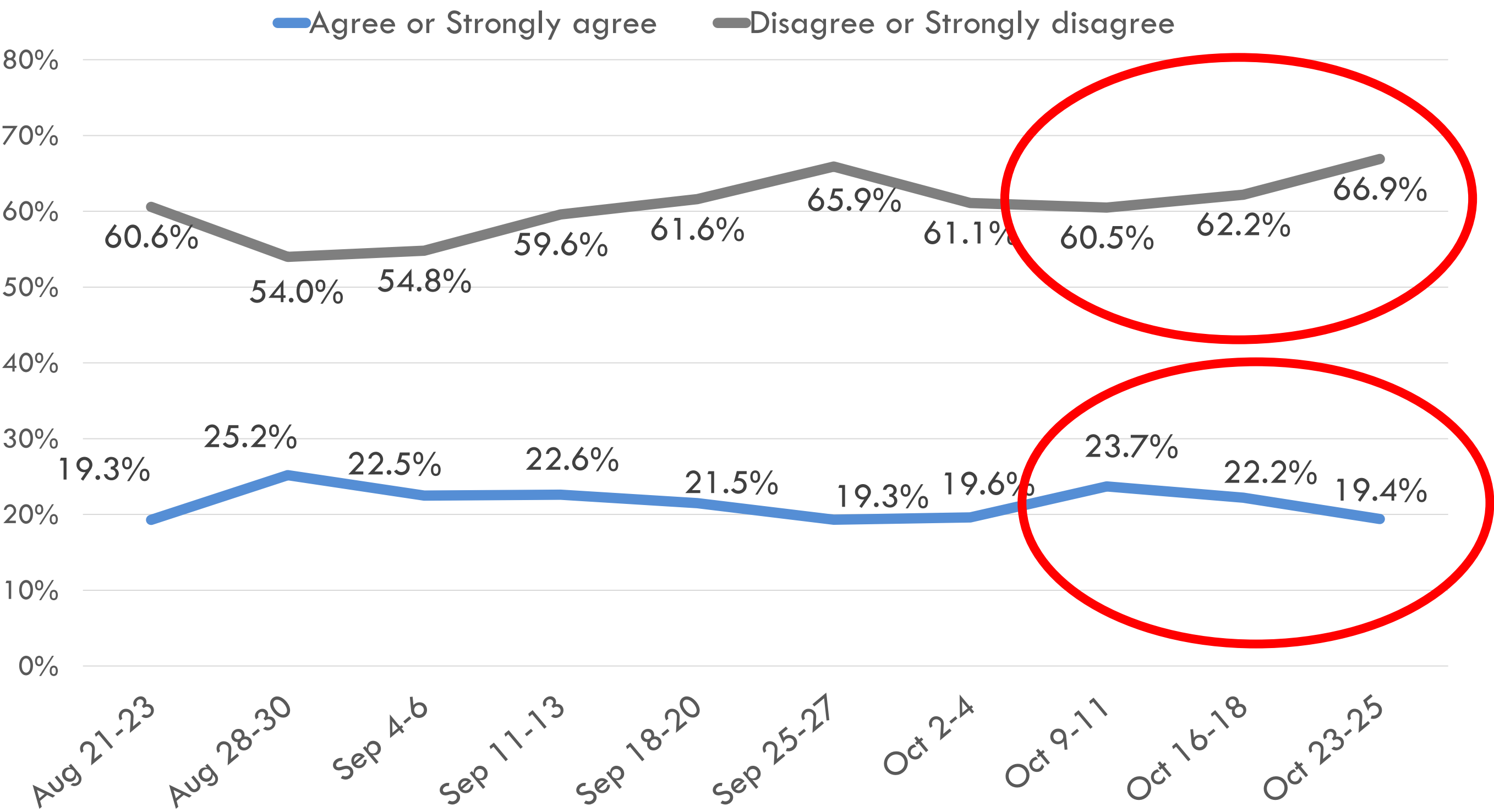
How much do you agree with the following statement?

Statement: I expect the Coronavirus situation will be resolved BEFORE THE END OF THIS YEAR.



(Base: Waves 24-33. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

Historical data

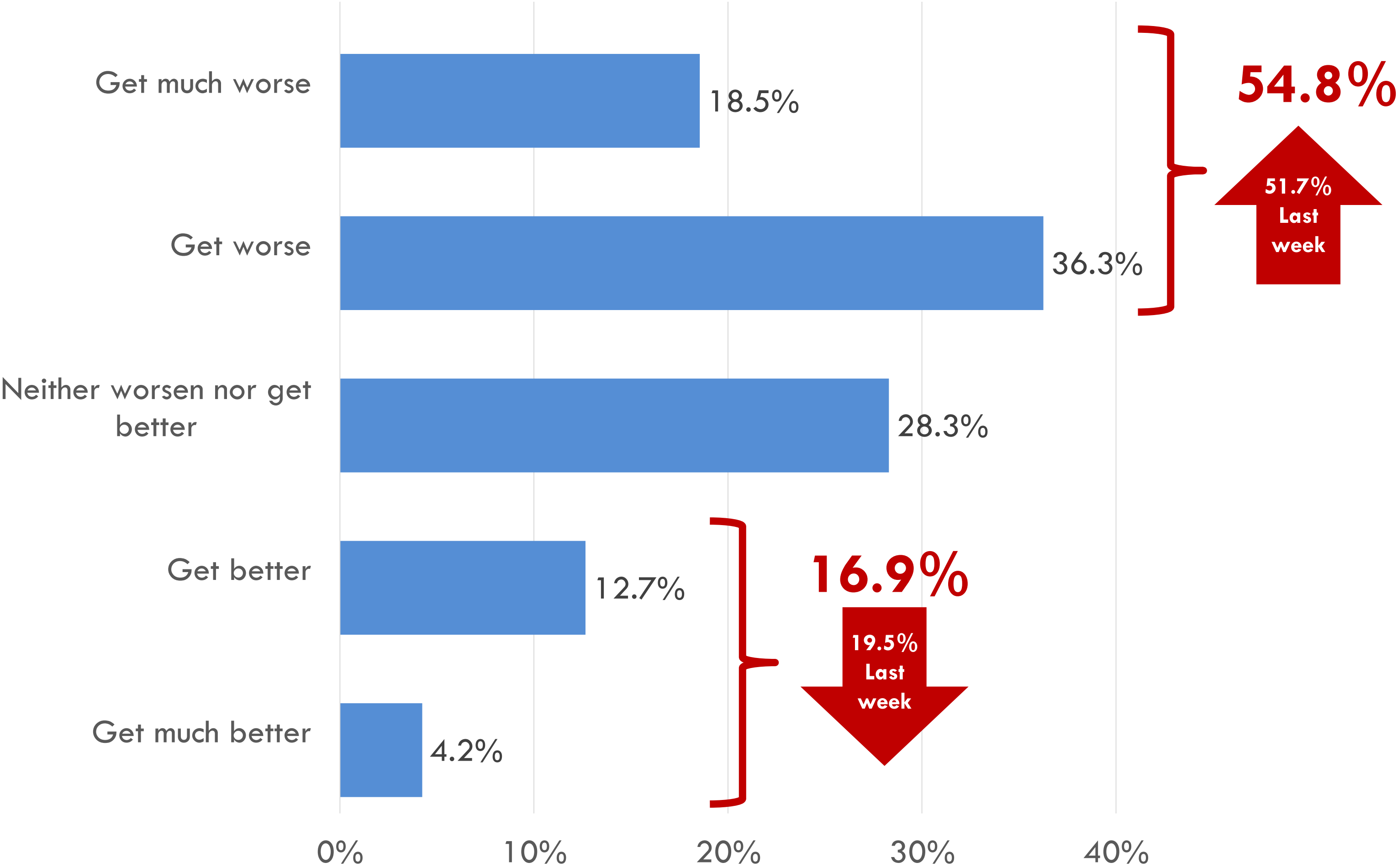


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

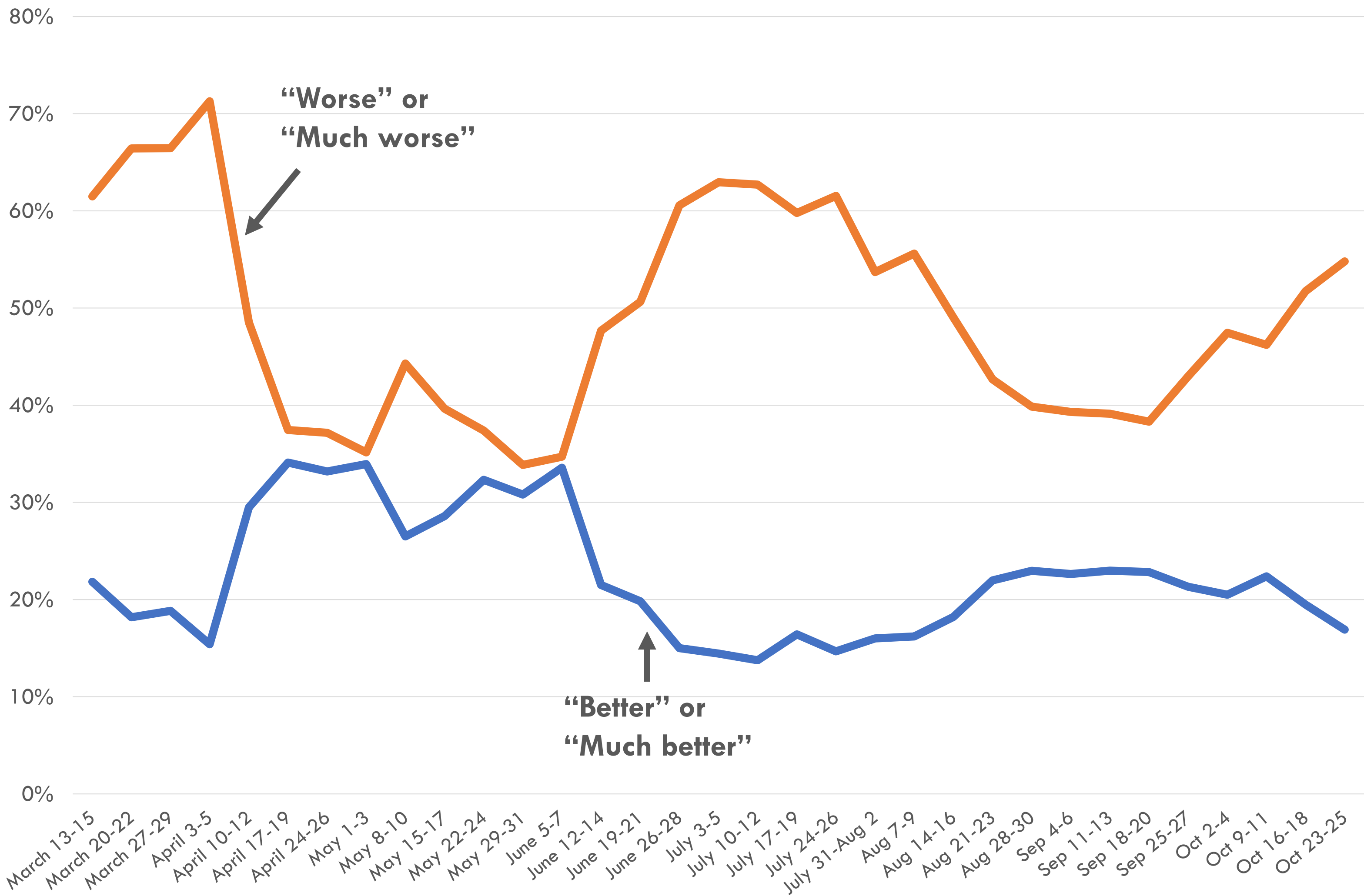


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-33)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

(Base: Waves 1-33. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

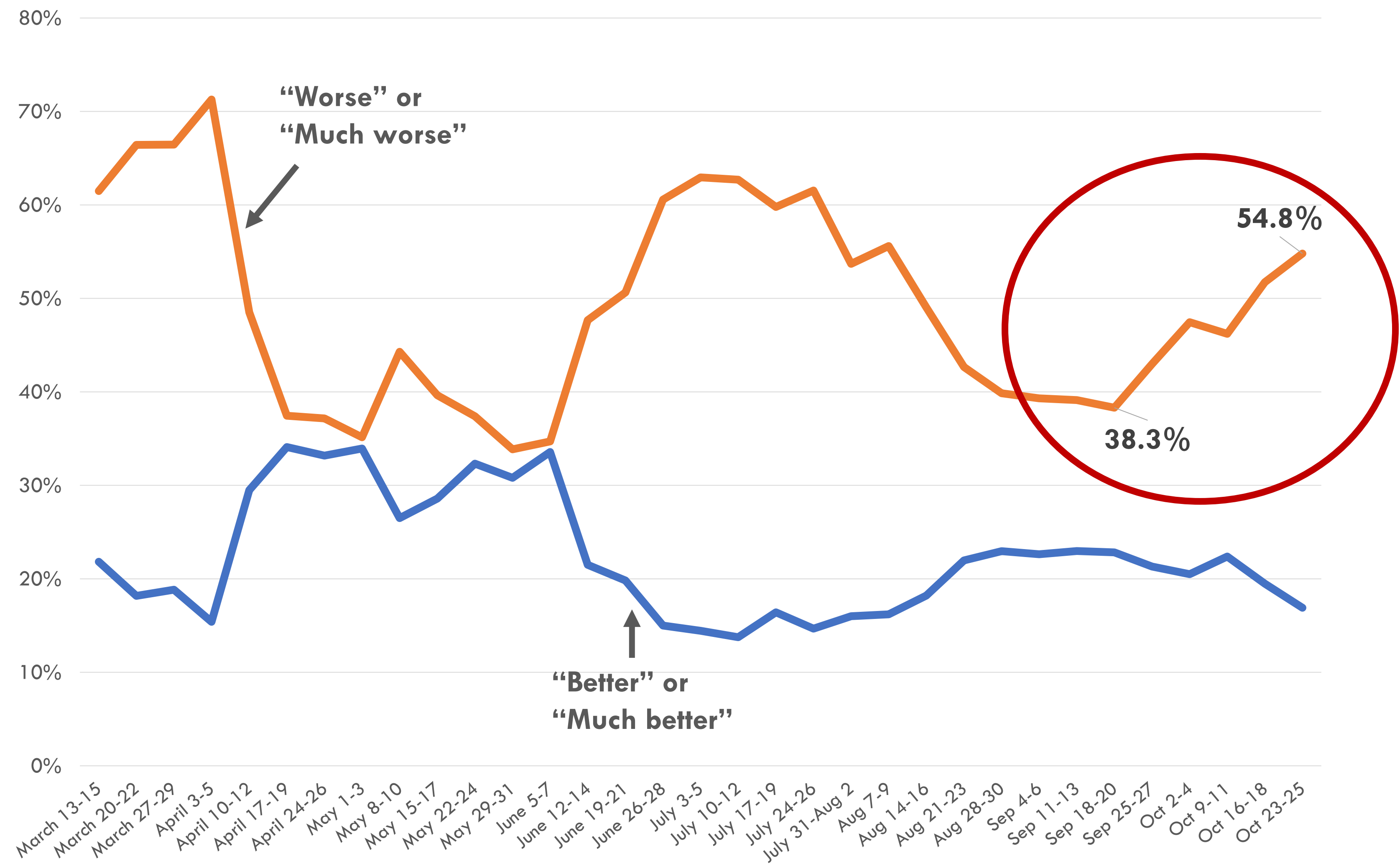


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-33)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

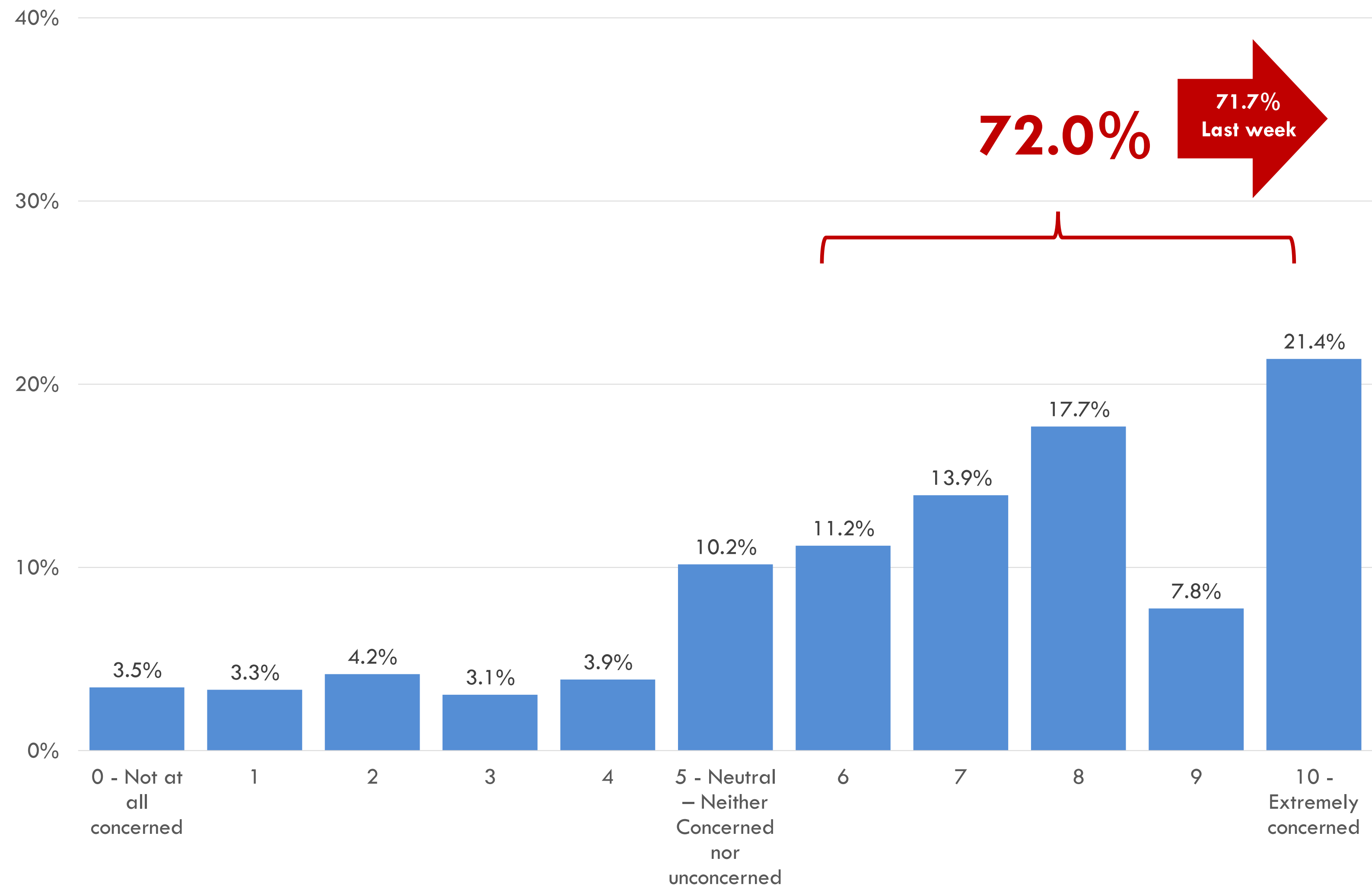
(Base: Waves 1-33. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)



PERSONAL HEALTH CONCERNS

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



PERSONAL HEALTH CONCERNS

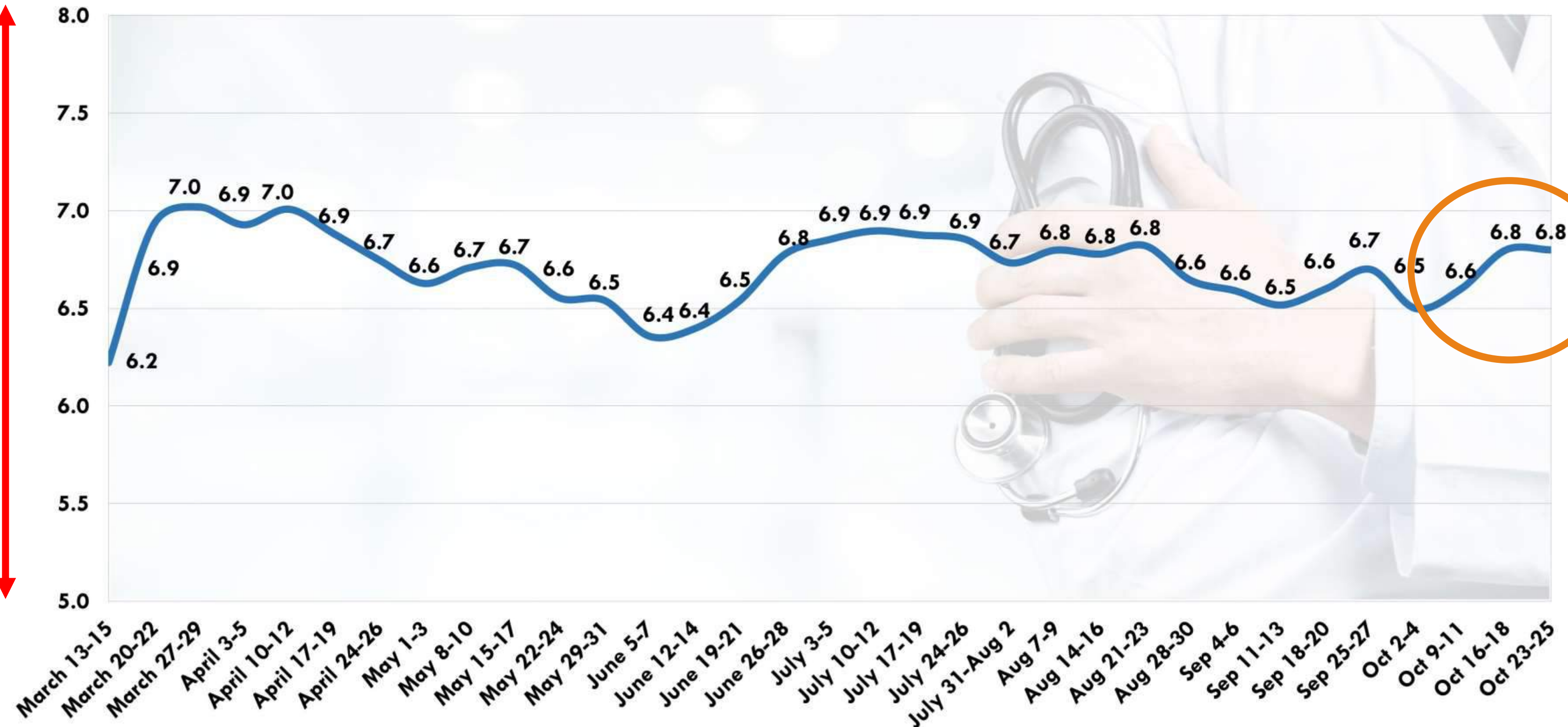
MARCH 13 – OCTOBER 25



CONCERNED ABOUT PERSONAL HEALTH (AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern



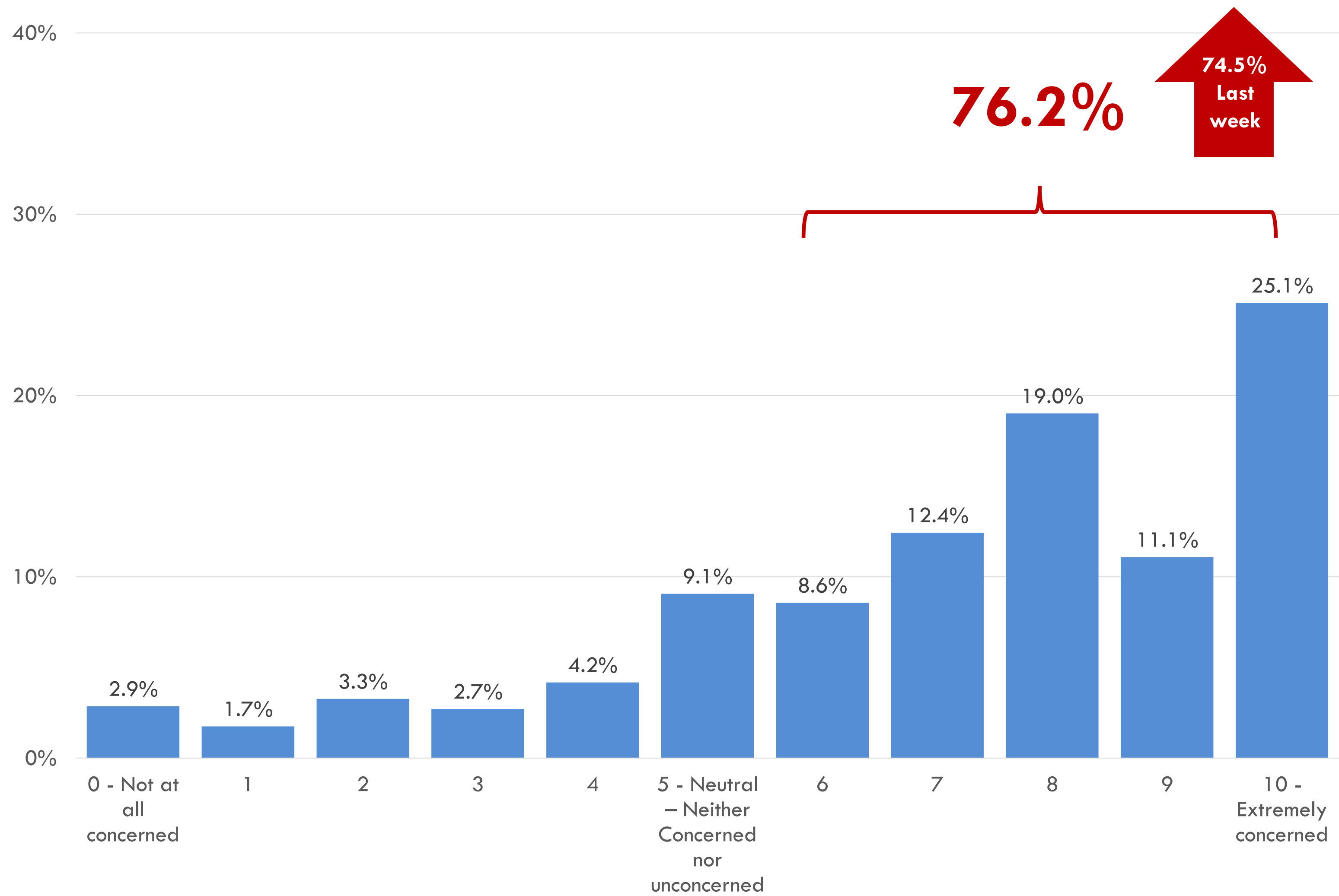
3 Weeks

QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?

HEALTH CONCERNS (FAMILY & FRIENDS)

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



HEALTH CONCERNS (FAMILY & FRIENDS)

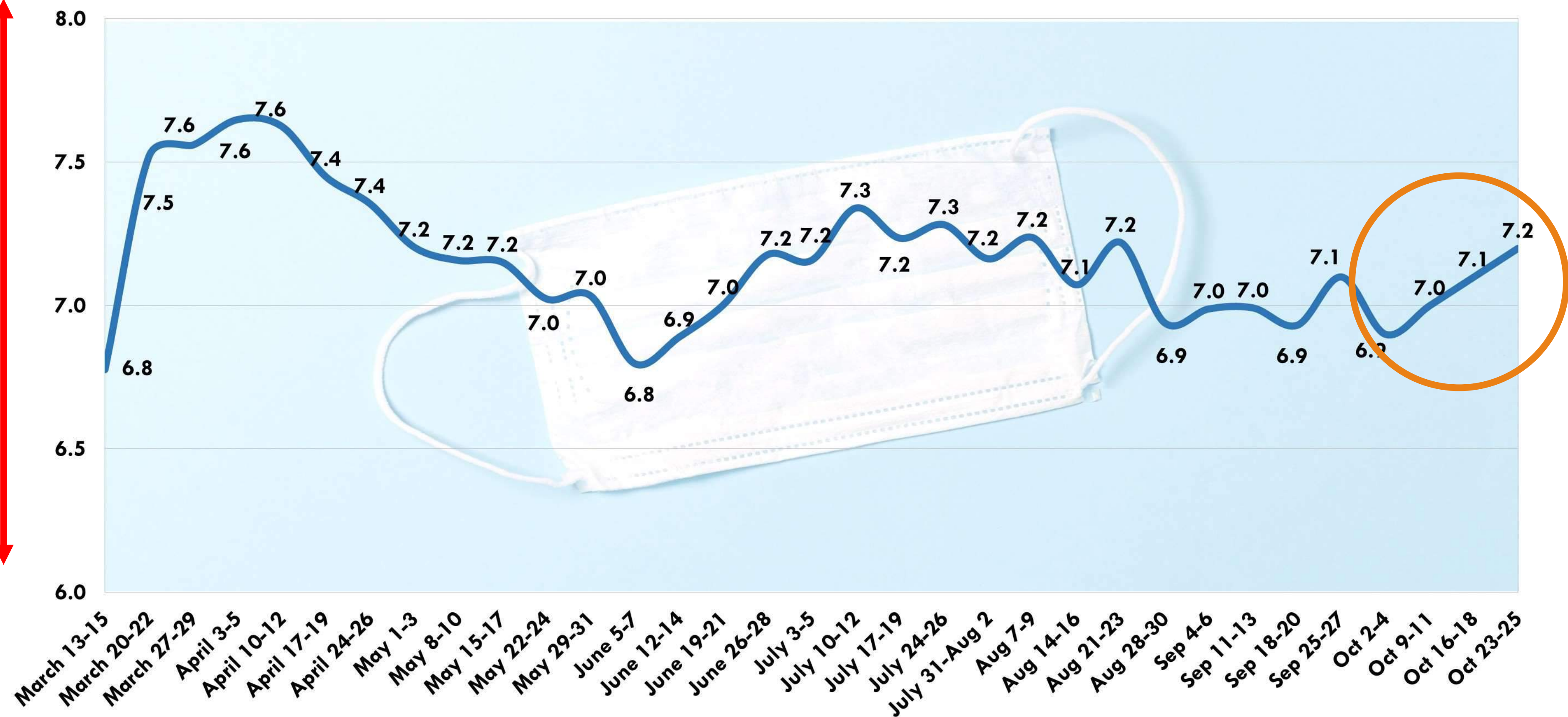
MARCH 13 – OCTOBER 25



CONCERNED ABOUT THE HEALTH OF FAMILY OR FRIENDS
(AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern



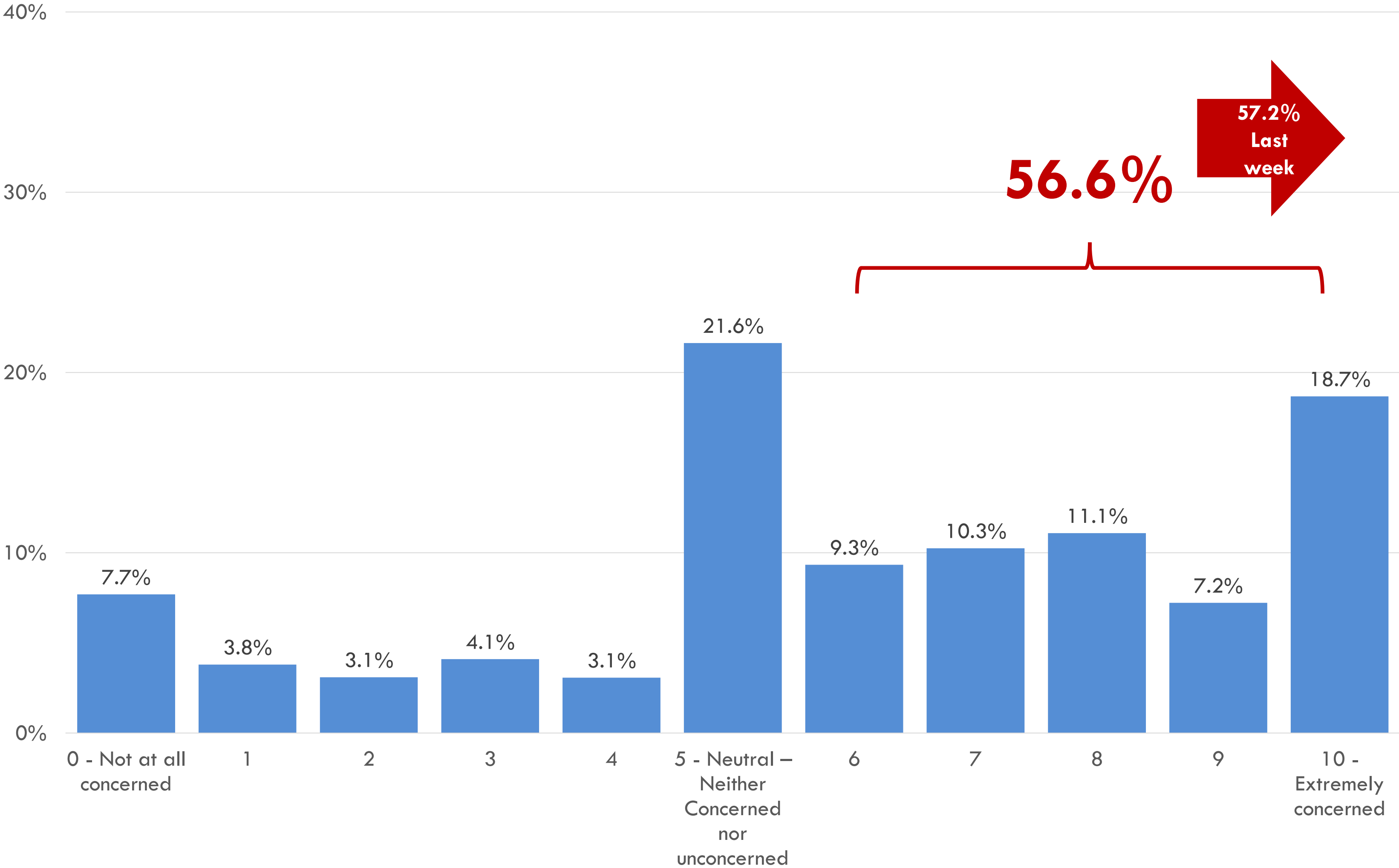
3 Weeks

QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?

CONCERNS ABOUT PERSONAL FINANCES

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



CONCERNS ABOUT PERSONAL FINANCES

MARCH 13 – OCTOBER 25



CONCERNED ABOUT PERSONAL FINANCES (AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern



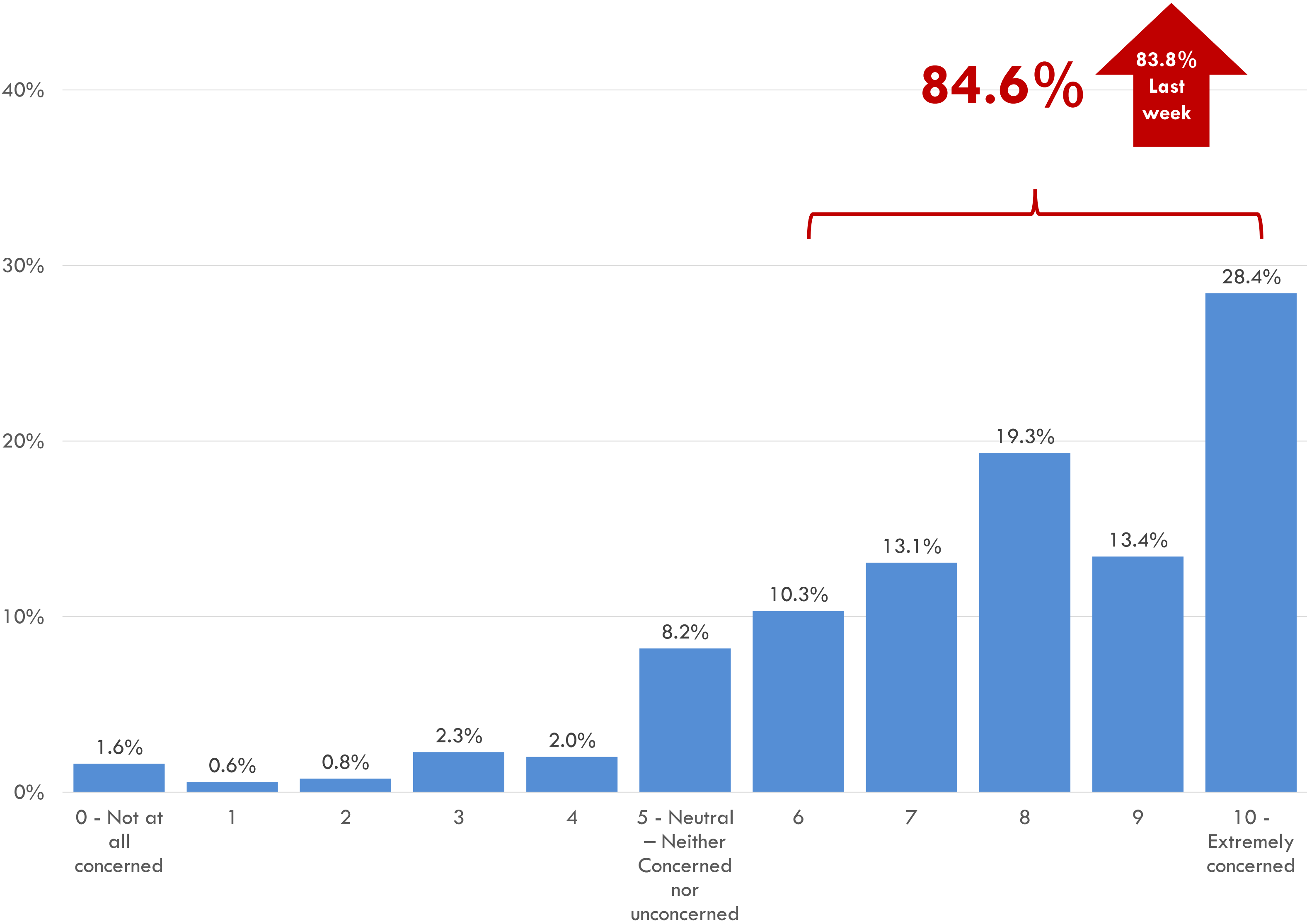
3 Weeks

QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON YOUR PERSONAL FINANCES?

CONCERNS ABOUT NATIONAL ECONOMY

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



CONCERNS ABOUT NATIONAL ECONOMY

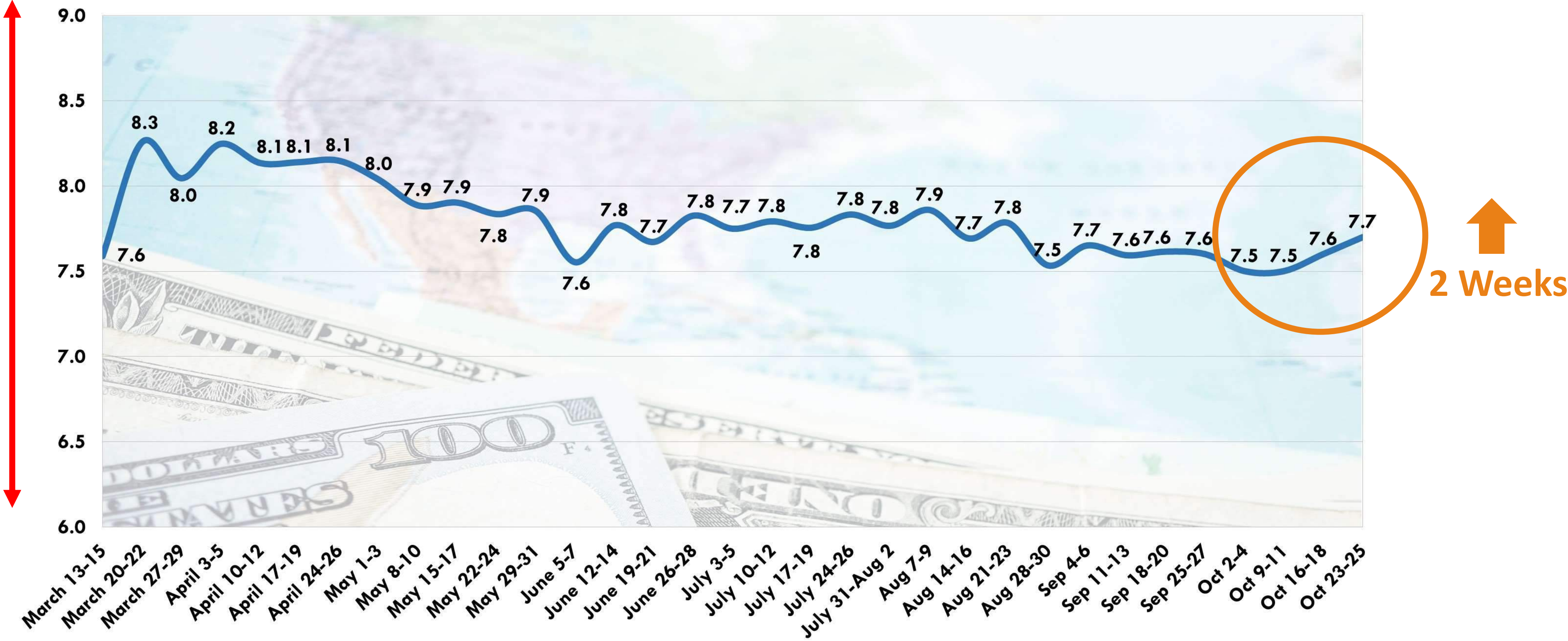
MARCH 13 – OCTOBER 25



CONCERNED ABOUT NATIONAL ECONOMY (AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern



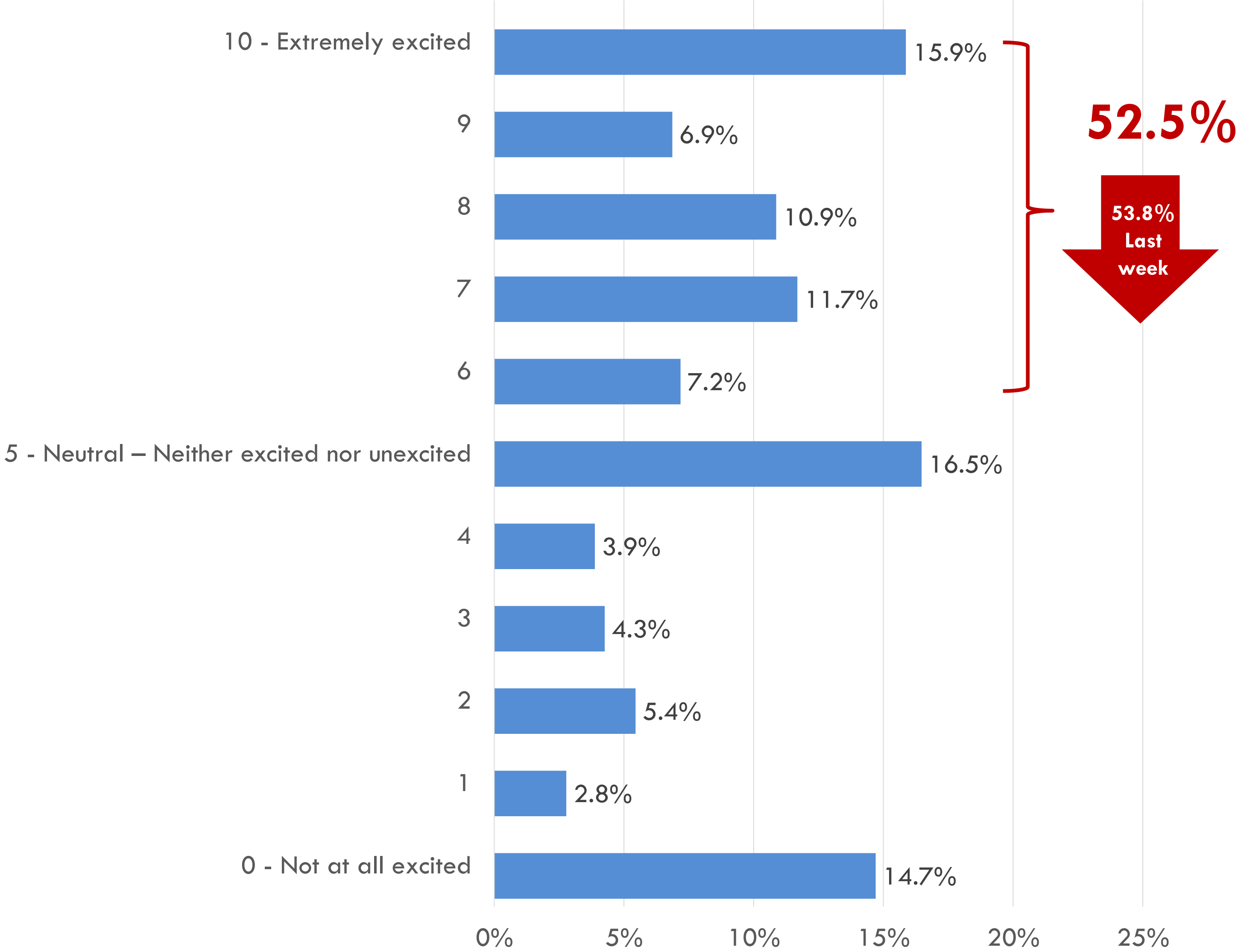
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE NATIONAL ECONOMY?

EXCITEMENT TO TRAVEL NOW

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



EXCITEMENT TO TRAVEL RIGHT NOW

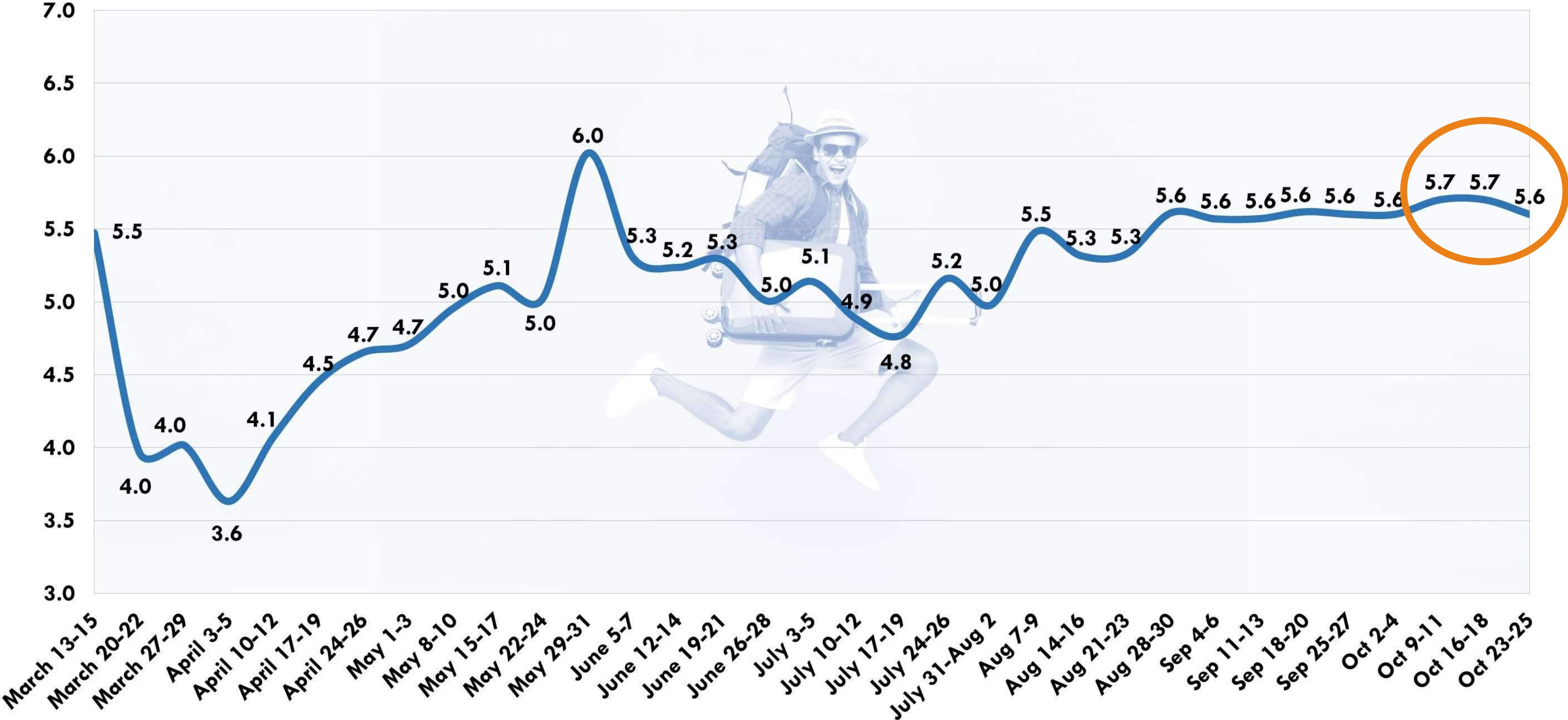
MARCH 13 – OCTOBER 25



EXCITED TO TRAVEL RIGHT NOW (AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern

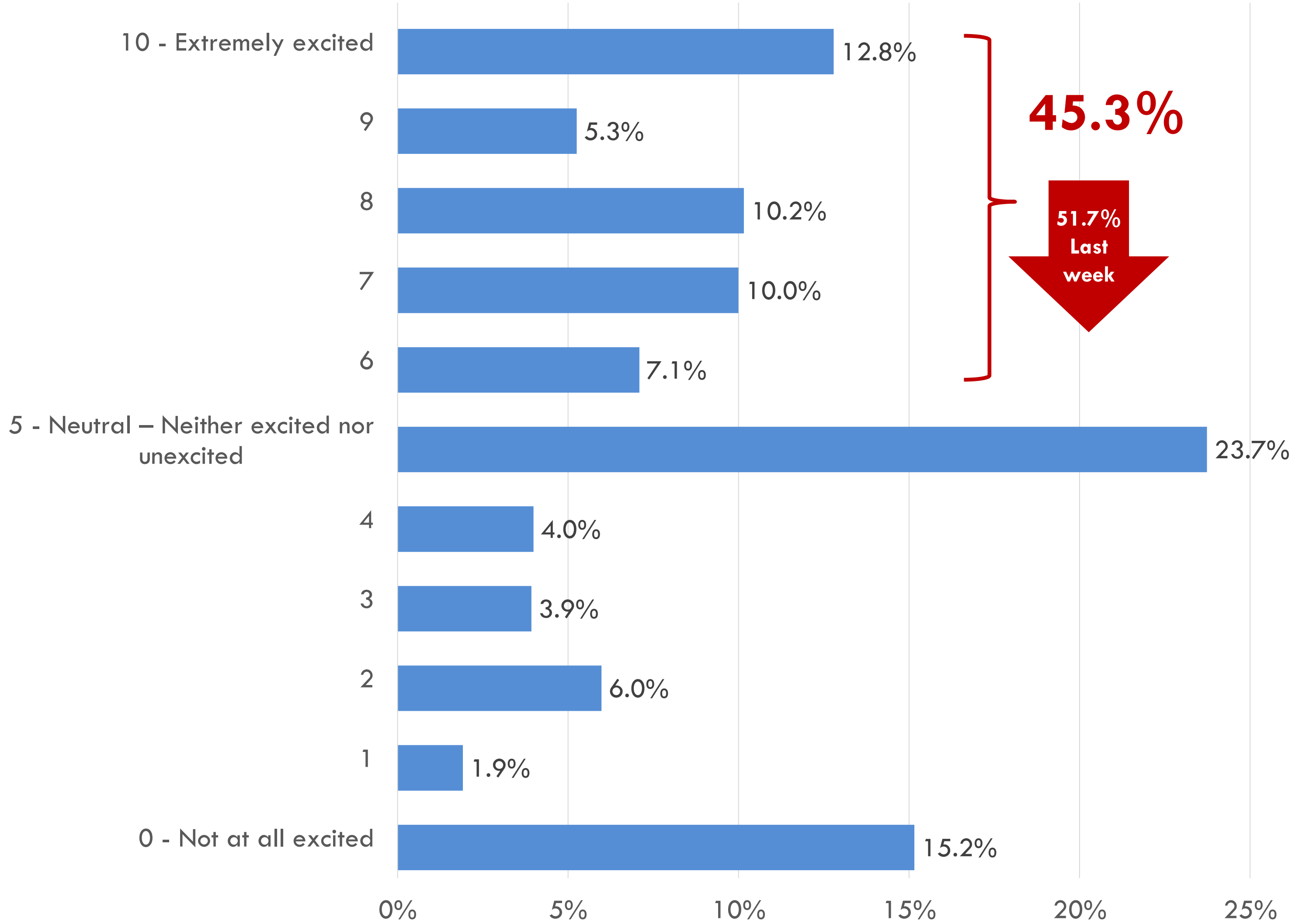


QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

OPENNESS TO TRAVEL INFORMATION

Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



OPENNESS TO TRAVEL INSPIRATION

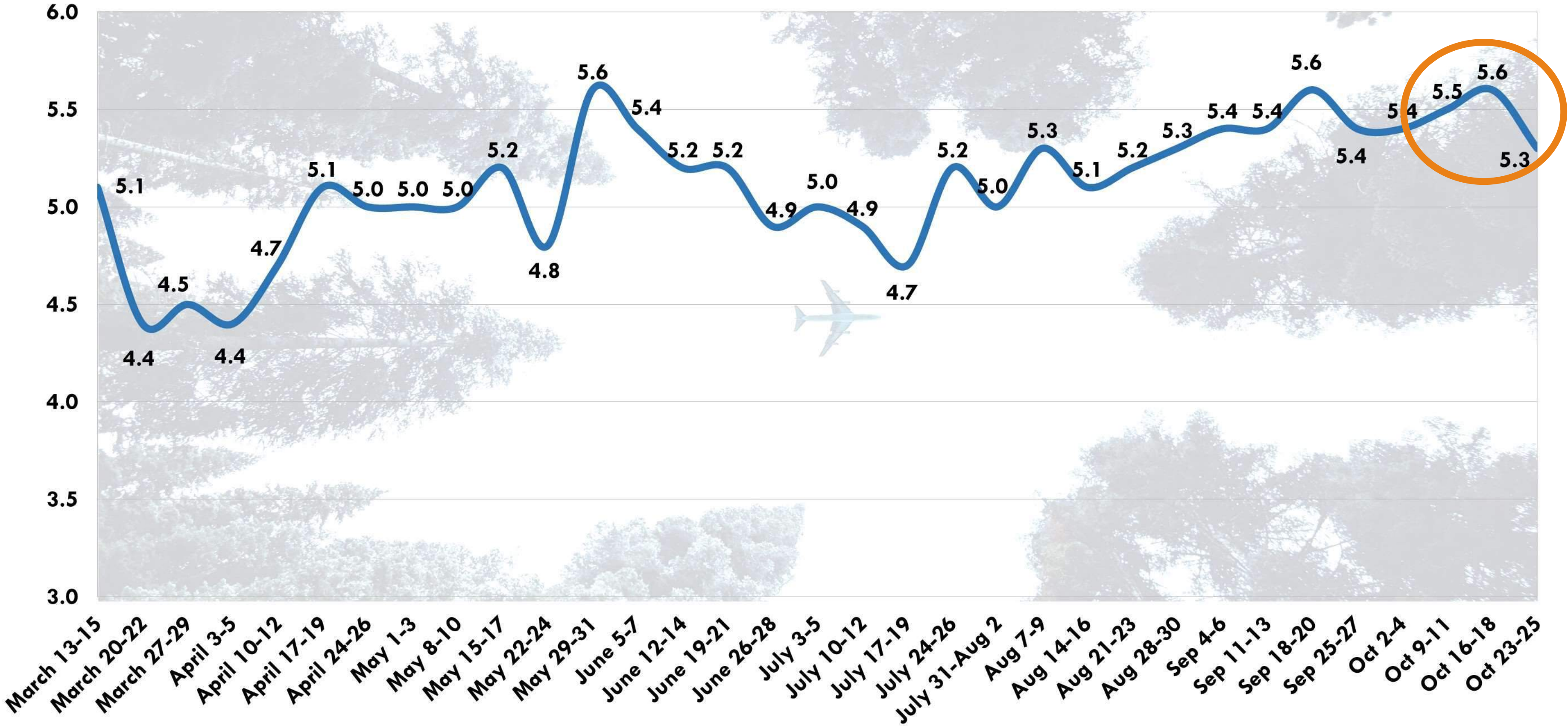
MARCH 13 – OCTOBER 25



OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE)

More concern

Less concern

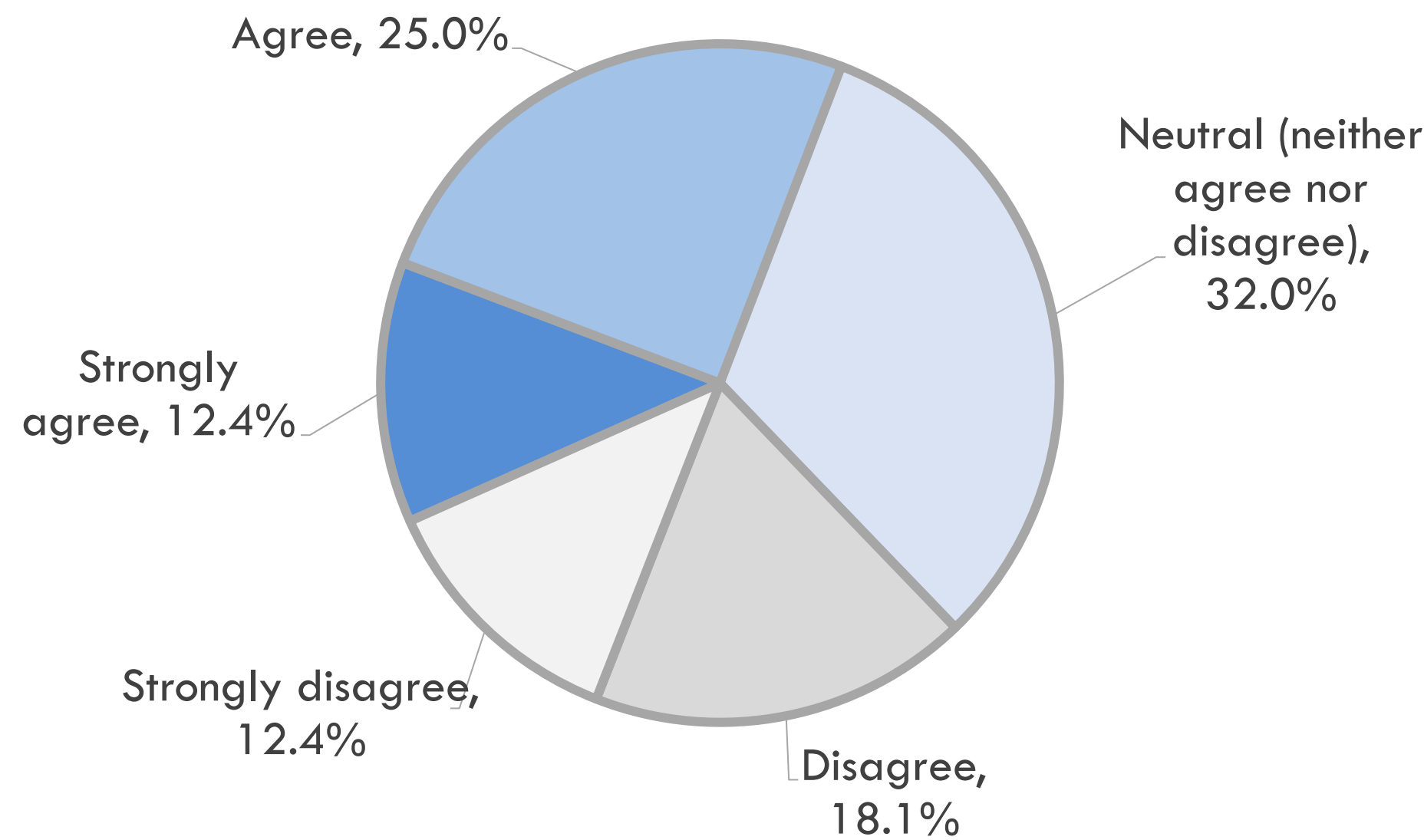


QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

DISCOUNTS AND PRICE CUTS

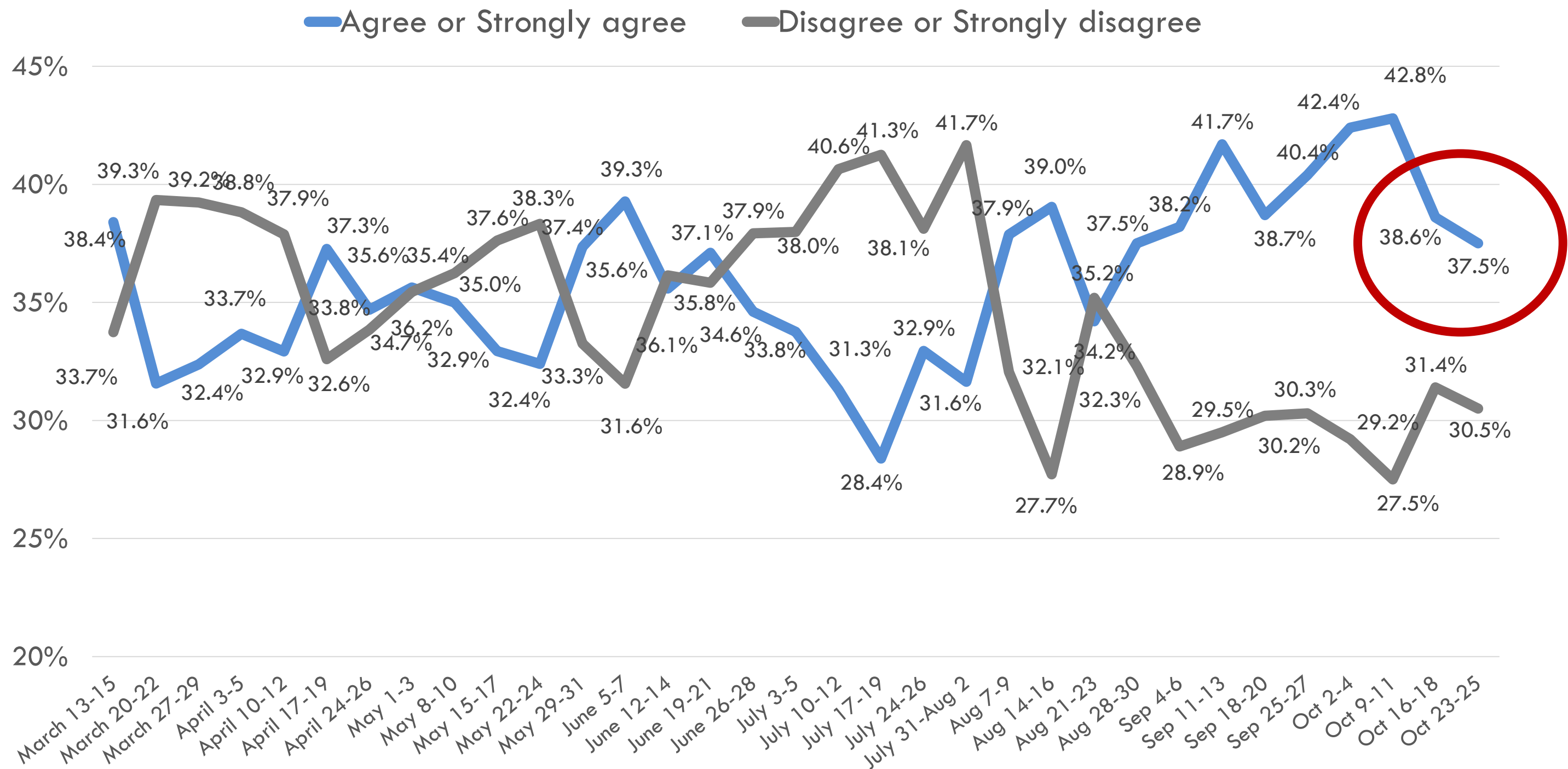
How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.



(Base: Waves 1-33. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

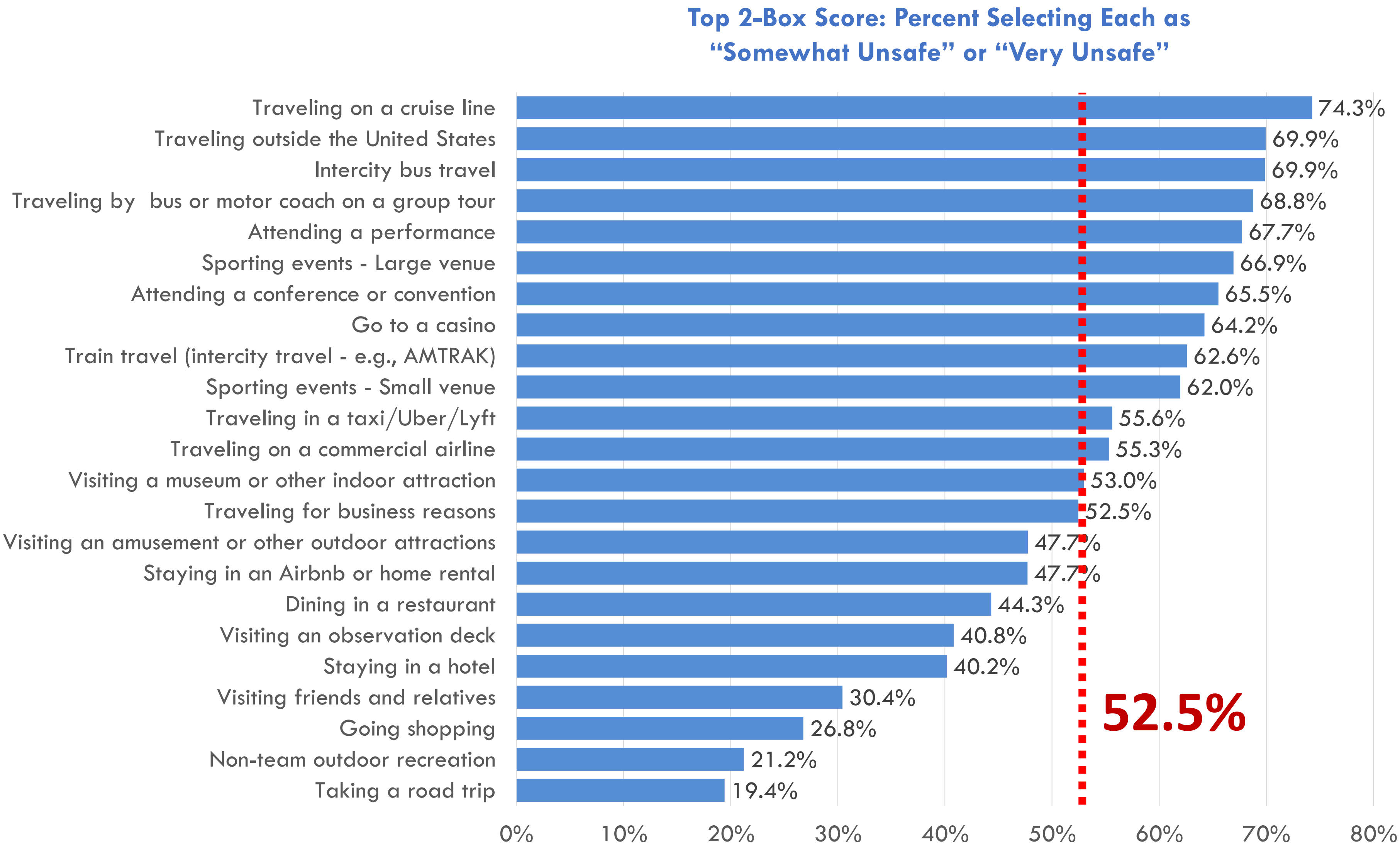
Historical data



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 33)

Question: At this moment, how safe would you feel doing each type of travel activity?

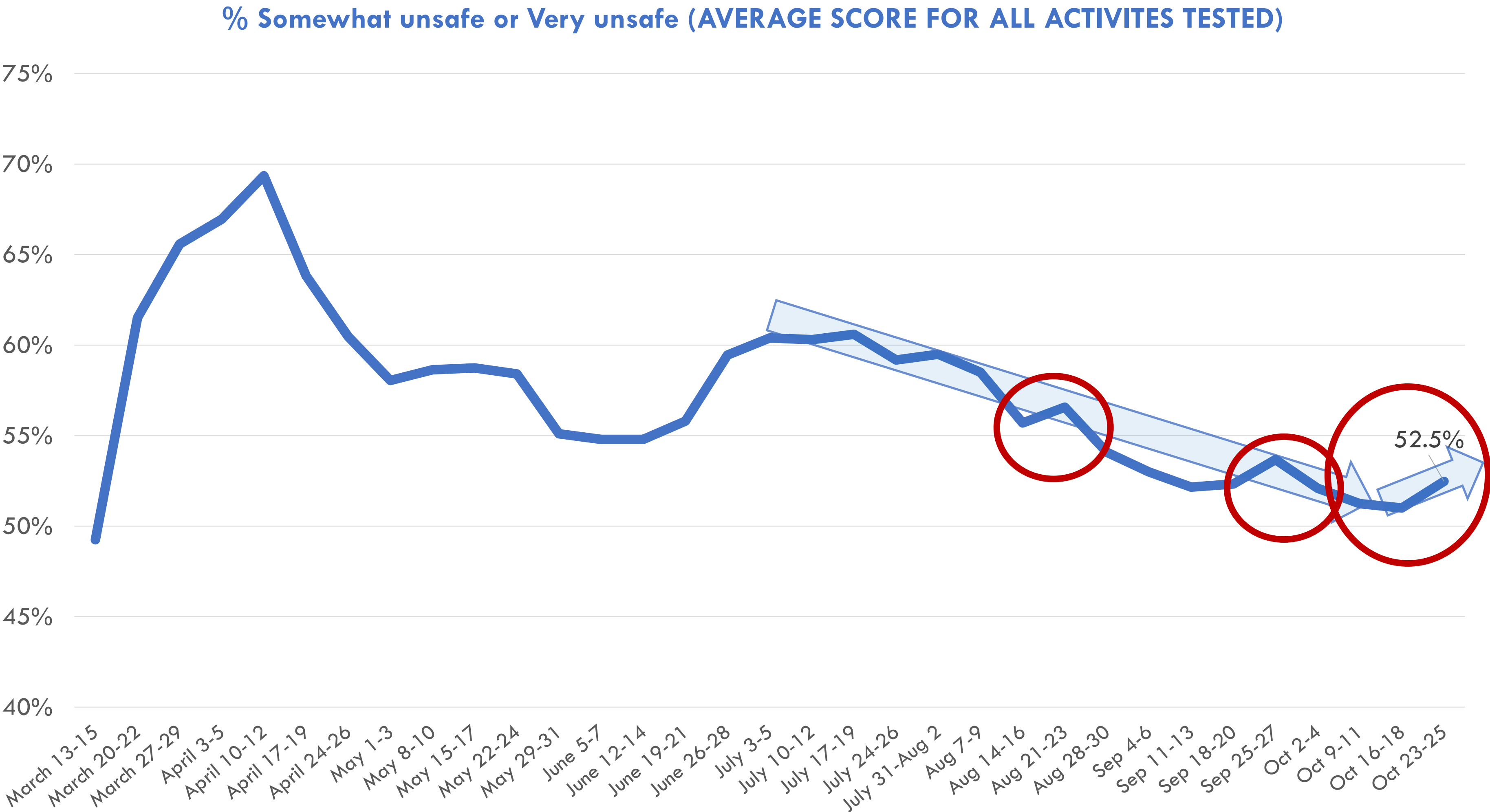
(Base: Wave 33 data. All respondents, 1,203 completed surveys.
Data collected Oct 23-25, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-33 COMPARISON)

Question: At this moment, how safe would you feel doing each type of travel activity?

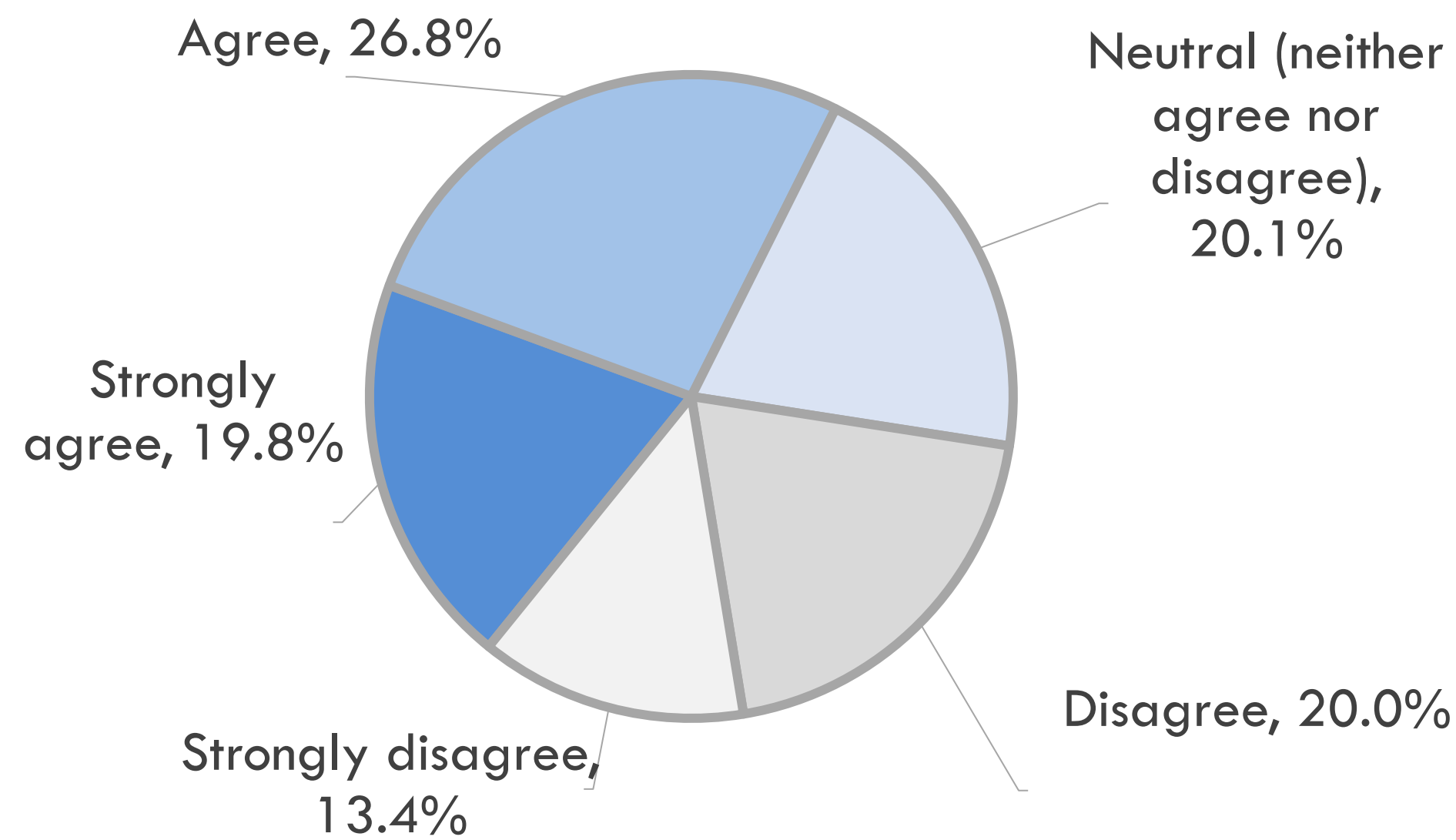
(Base: Waves 1-33. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)



LOSS OF INTEREST IN TRAVEL

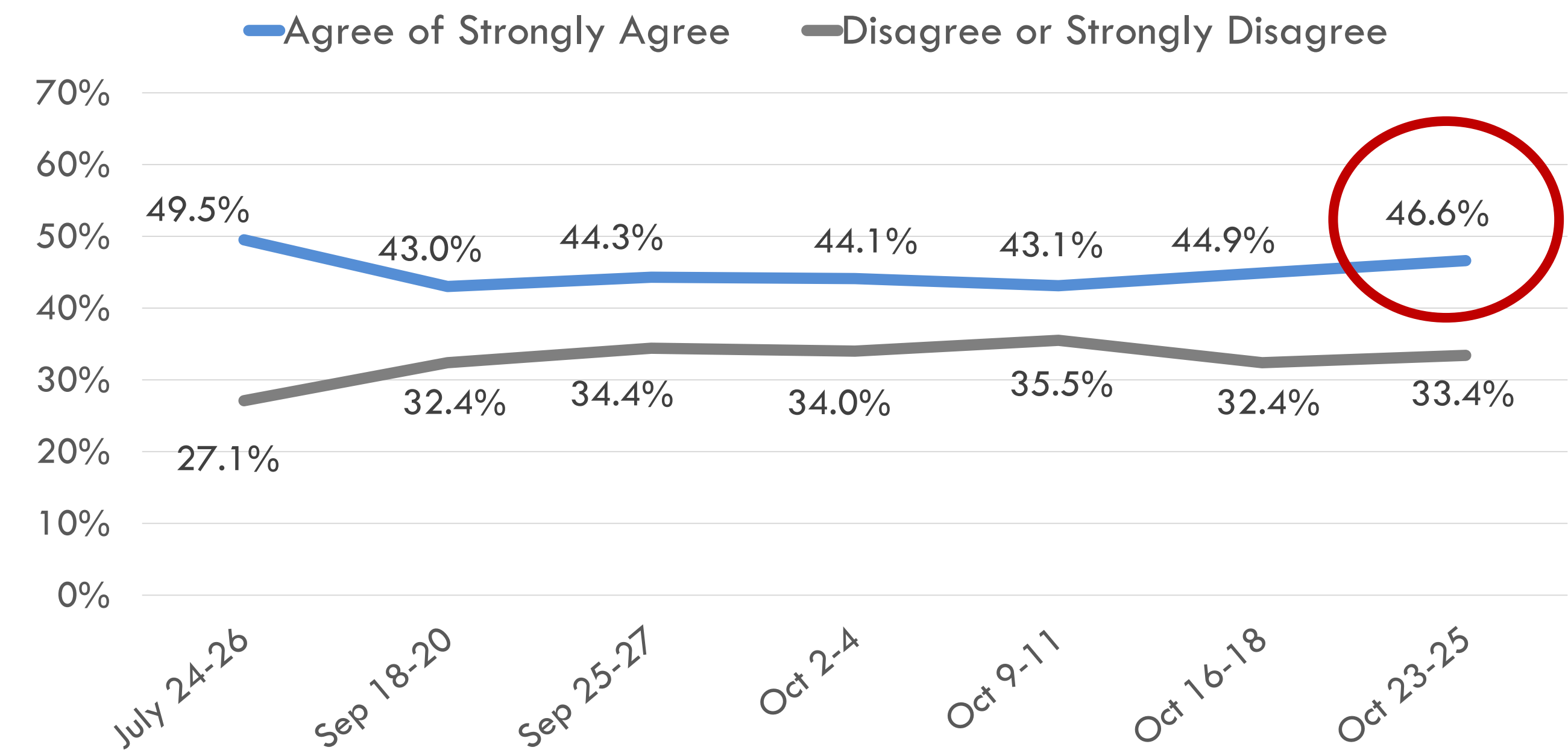
How much do you agree with the following statement?

Statement: I have lost my interest in/taste for traveling for the time being.



(Base: Waves 20, 28-33 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

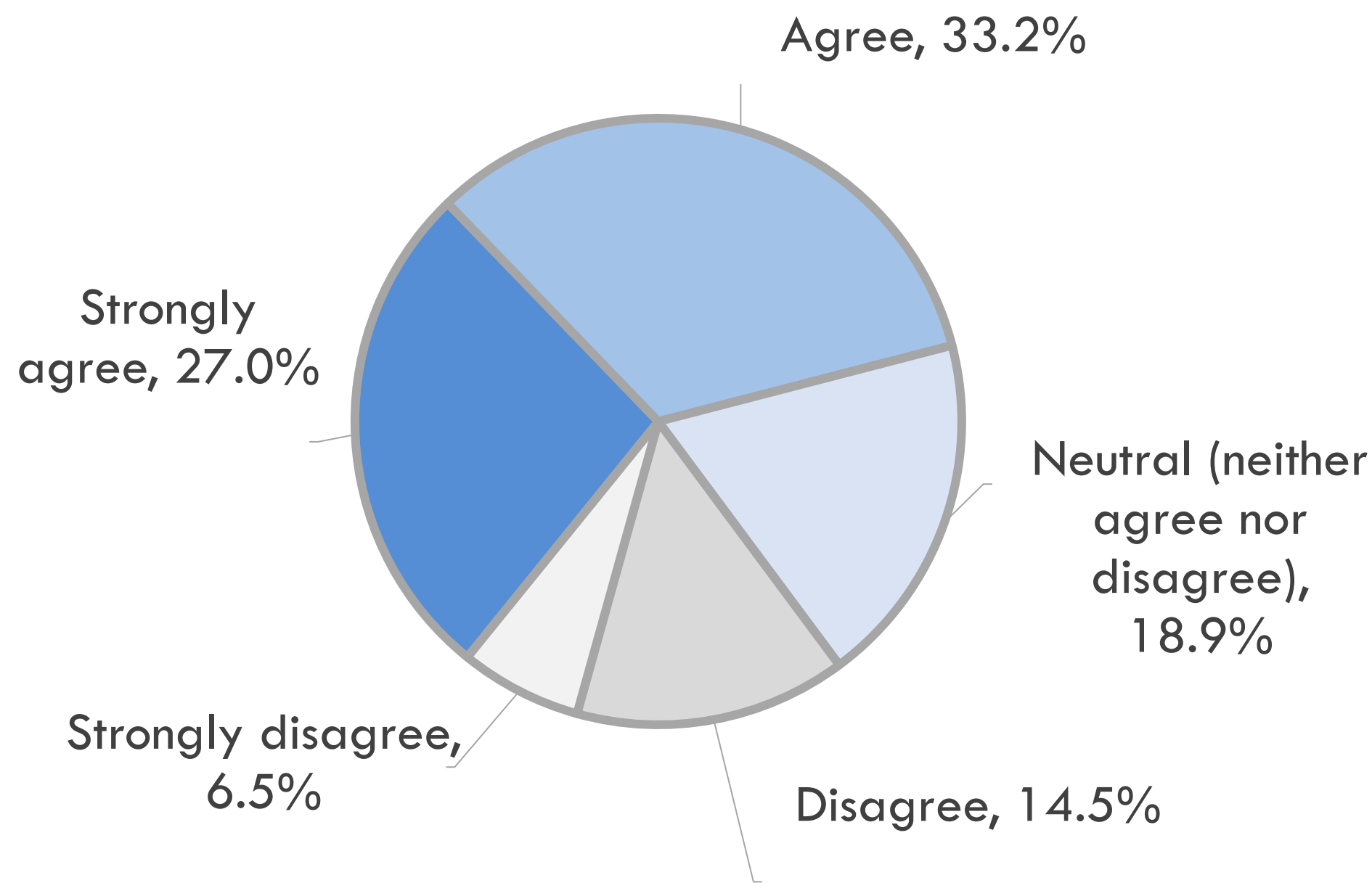
Historical data



INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

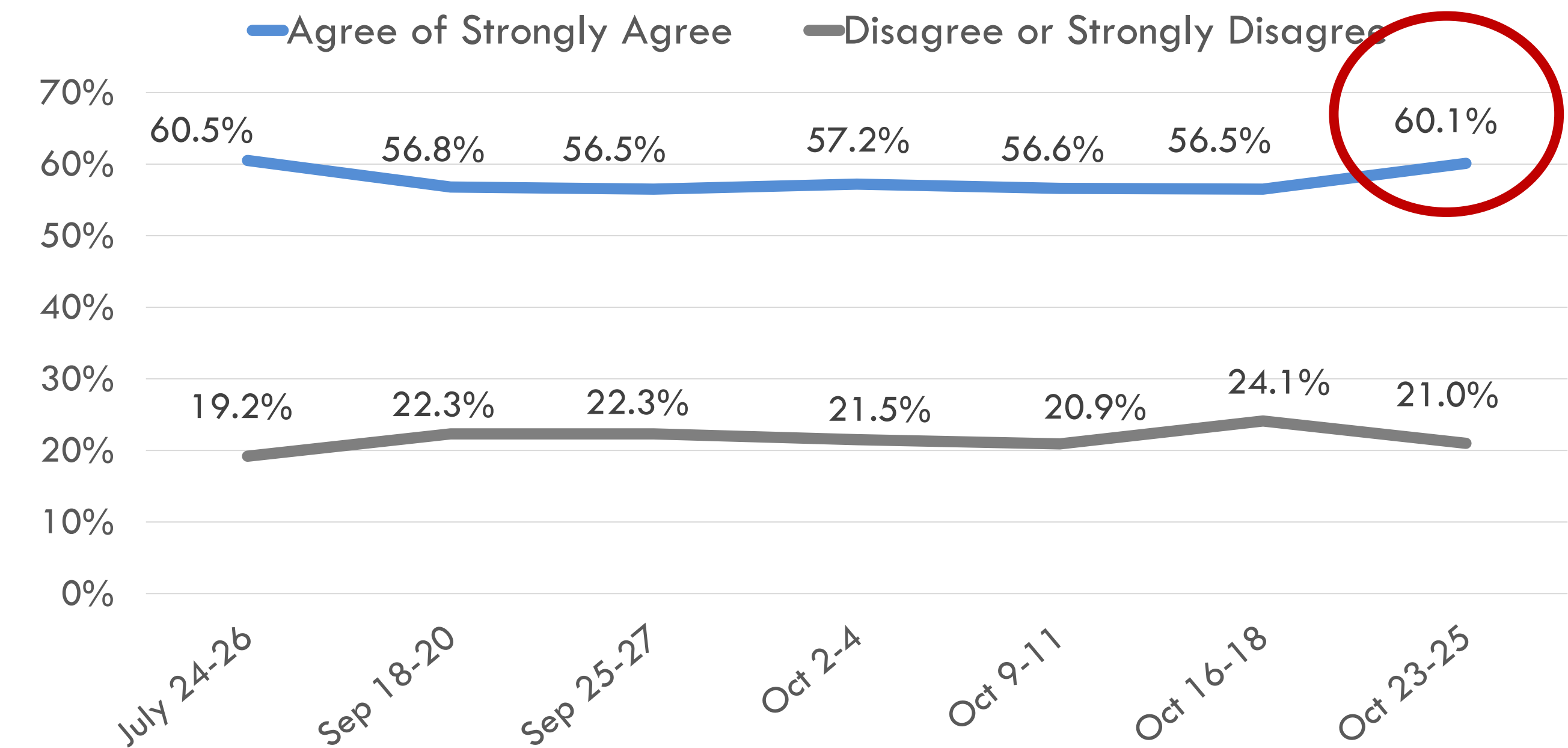
How much do you agree with the following statement?

Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.



(Base: Waves 20, 28-33 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

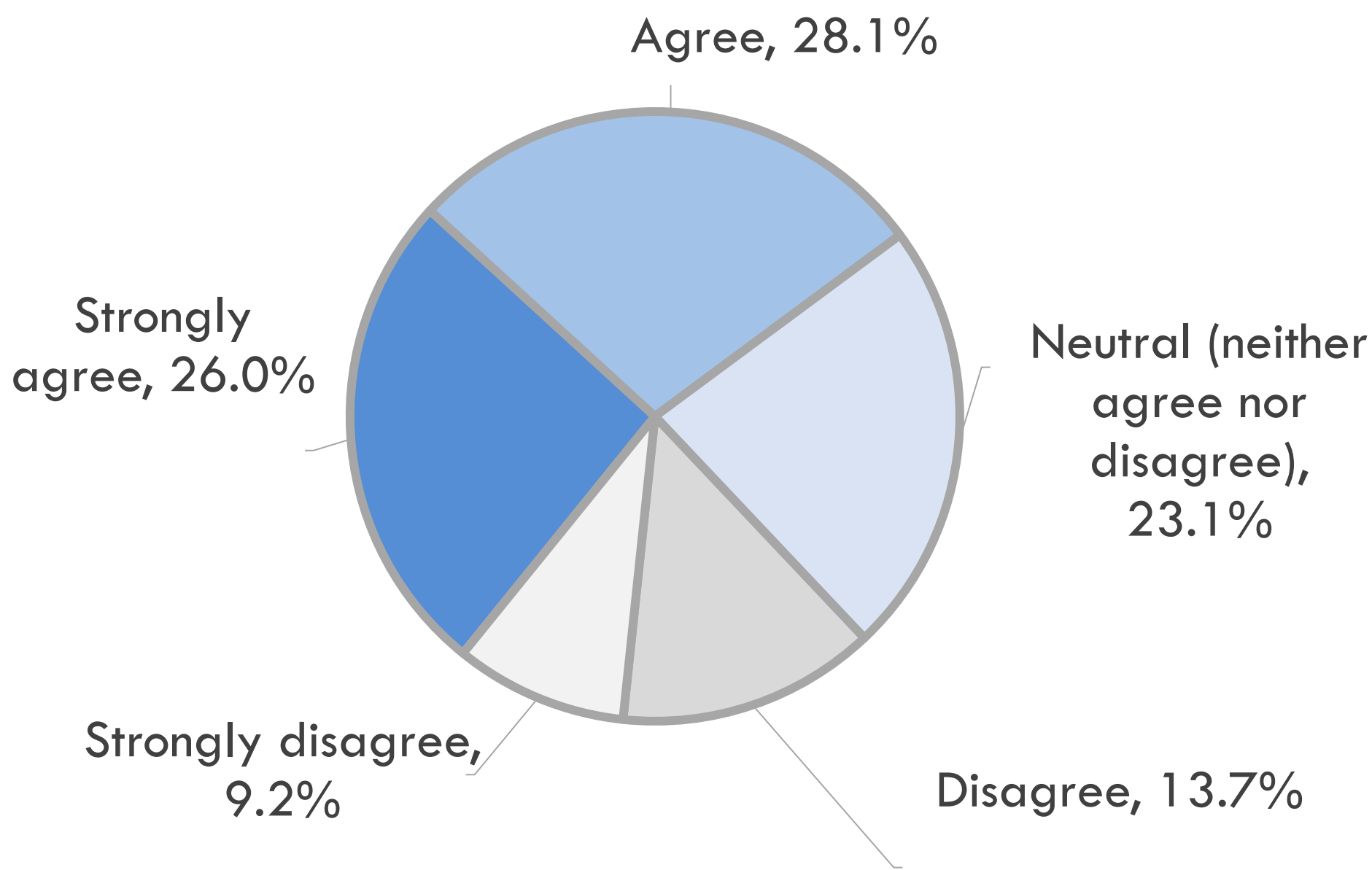
Historical data



TRAVEL AS AN ESSENTIAL NEED ONLY

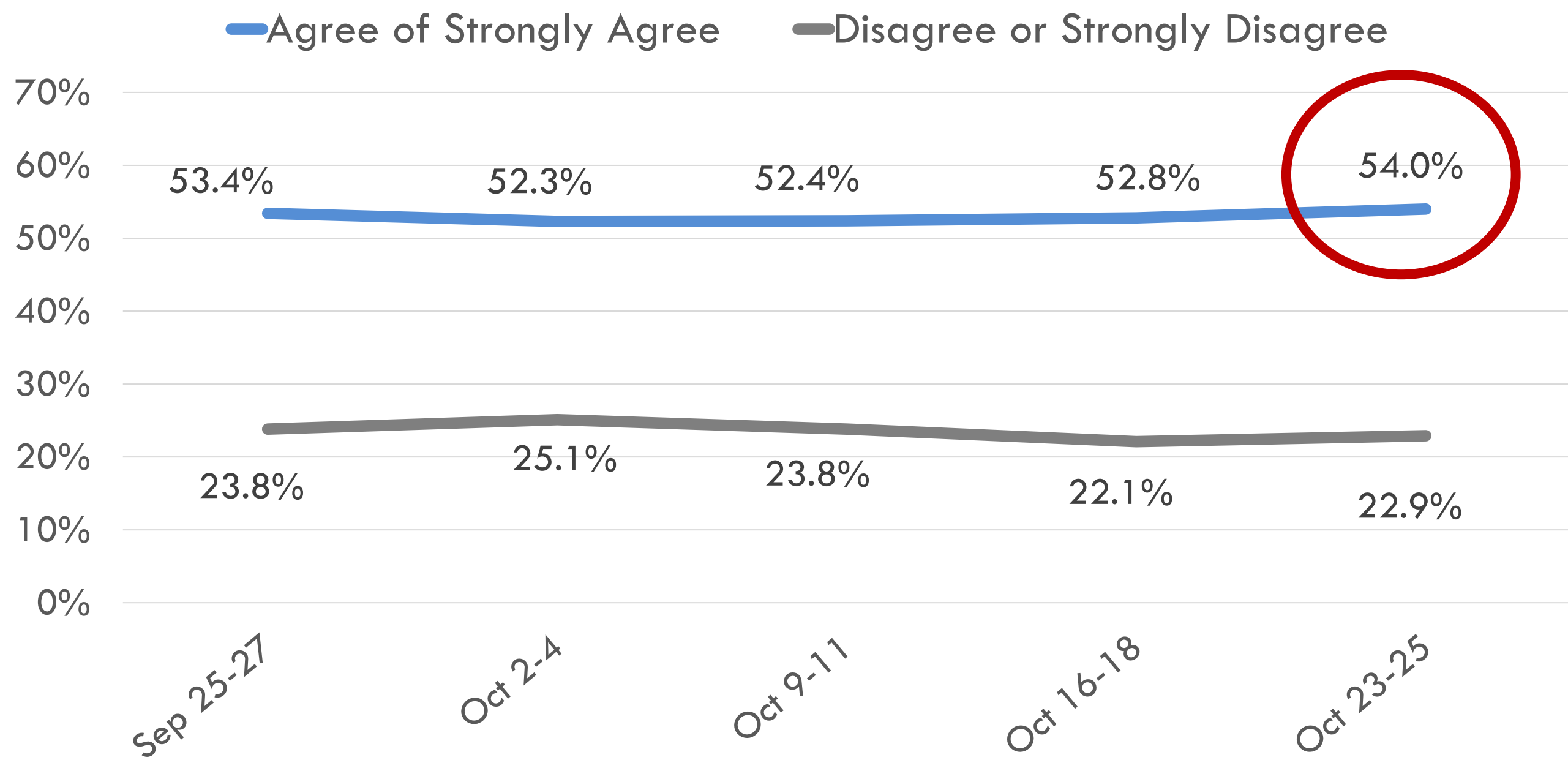
How much do you agree with the following statement?

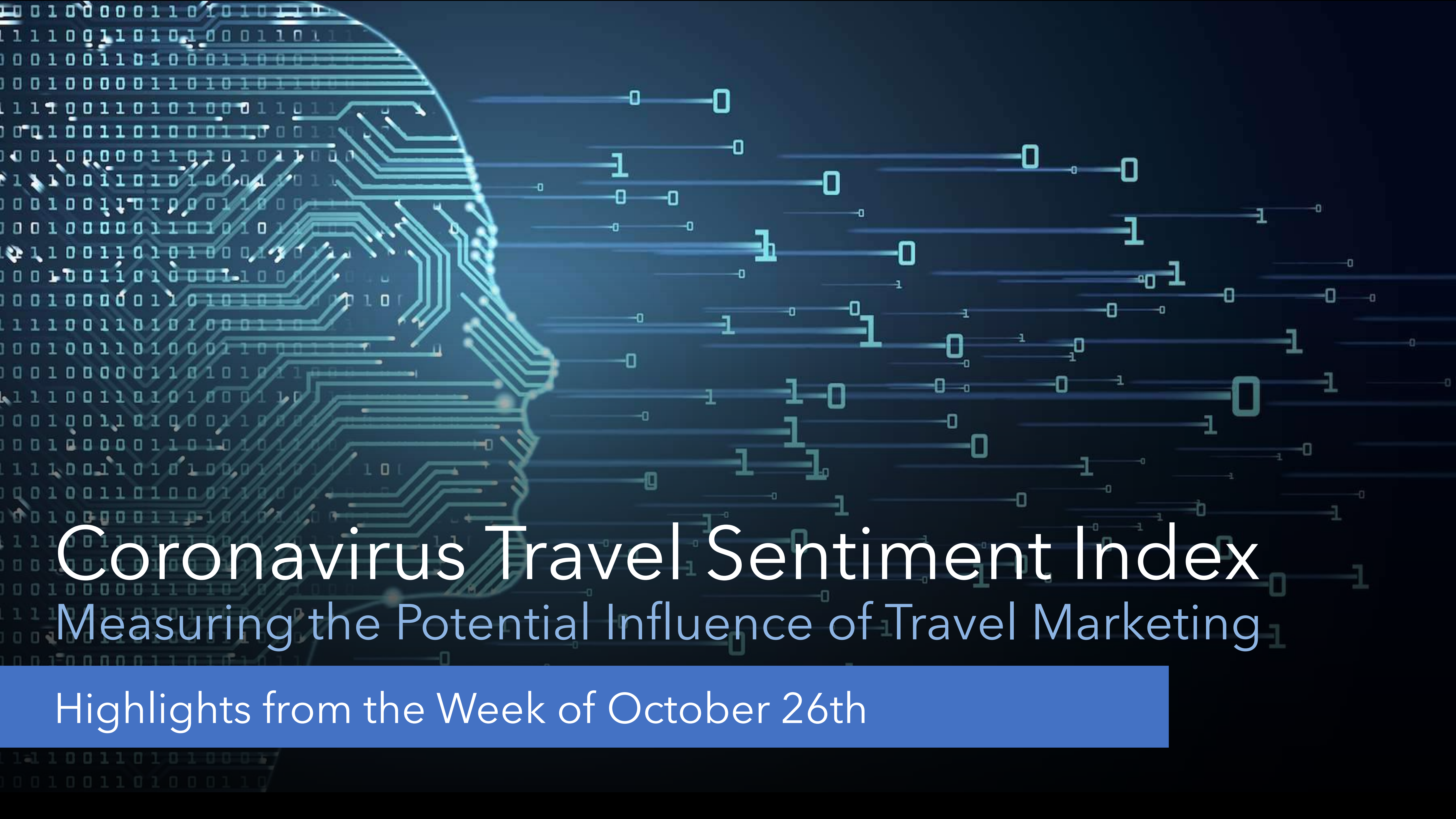
Statement: Due to the Coronavirus situation, I believe travel should be limited to essential needs only.



(Base: Waves 29-33 data. All respondents, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

Historical data



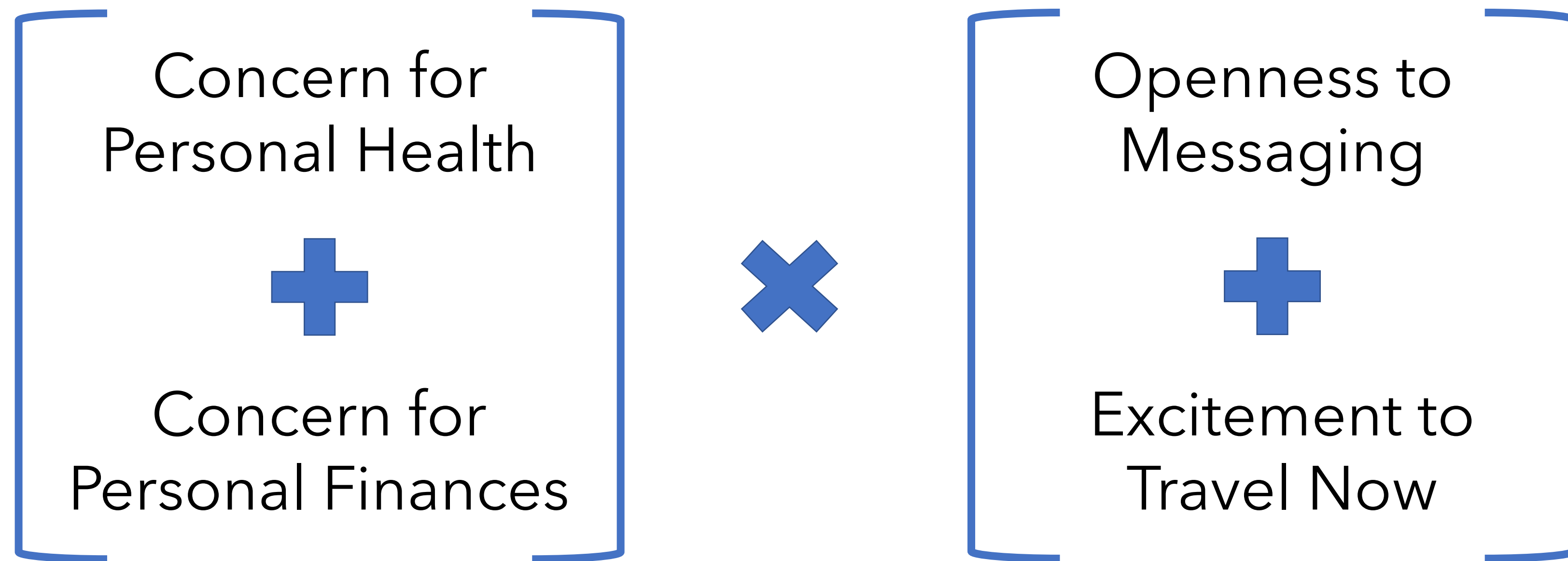


Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of October 26th

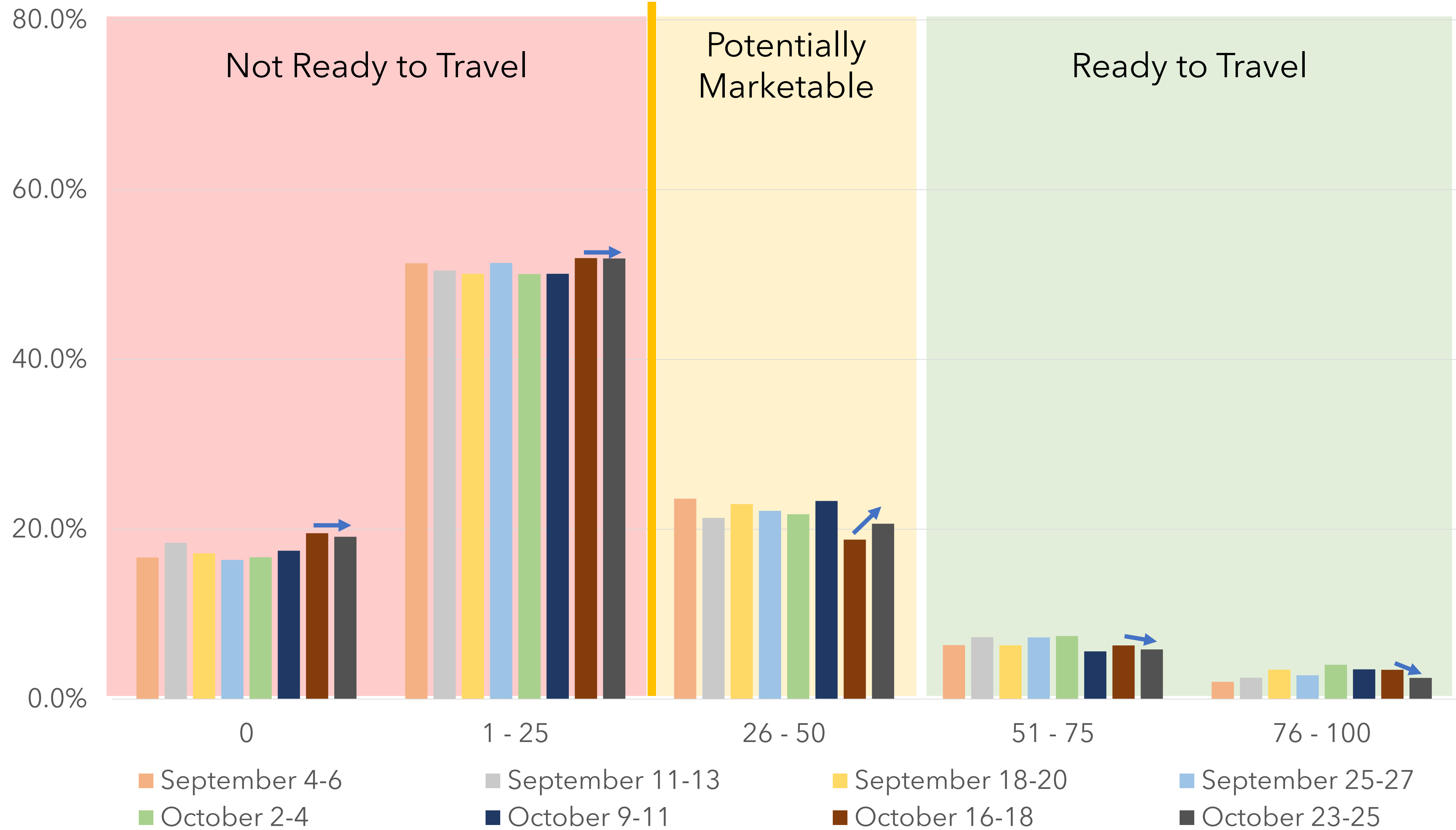
Predictive Index Formula

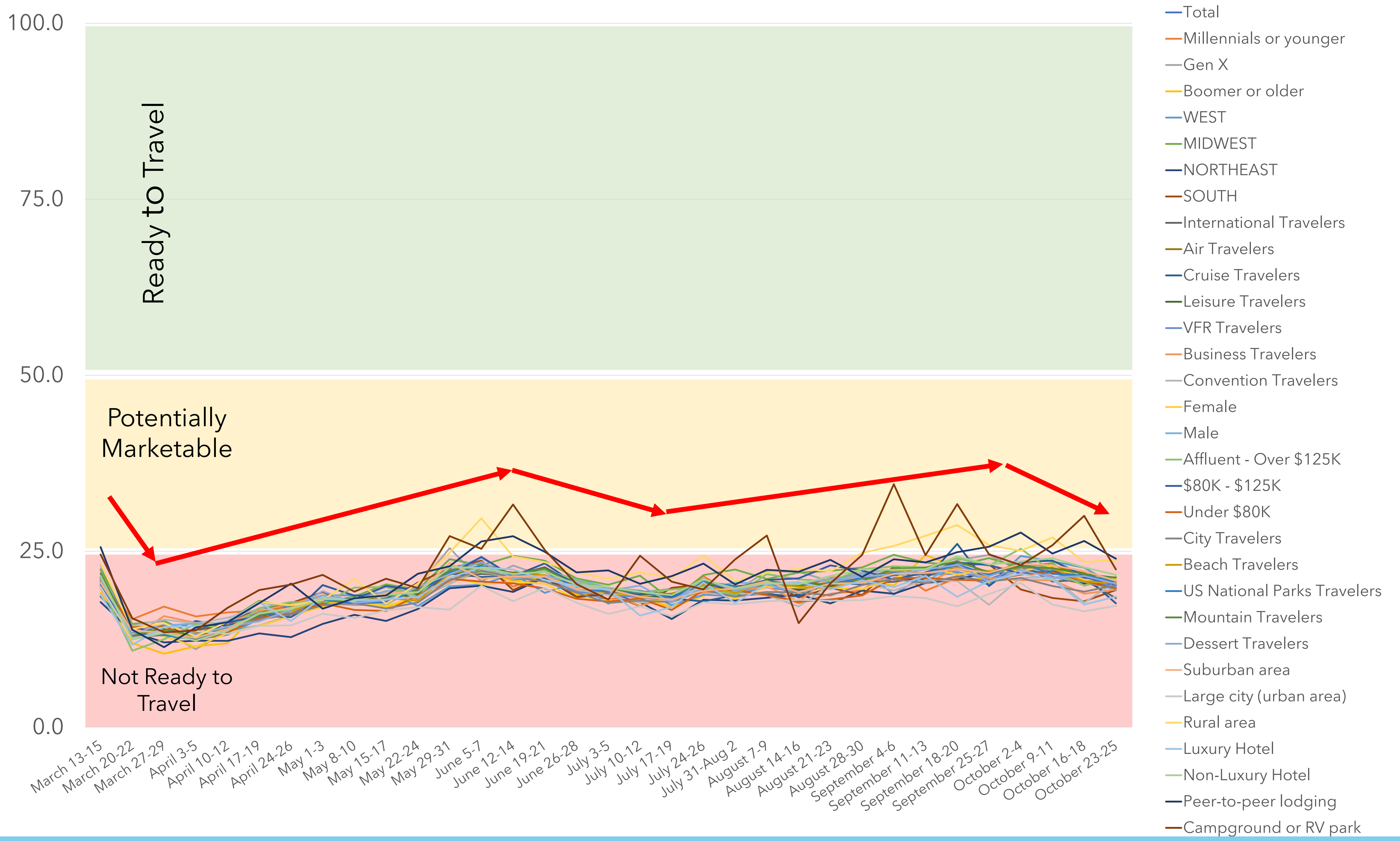


*Normalized to a 100pt scale

Travel Outlook

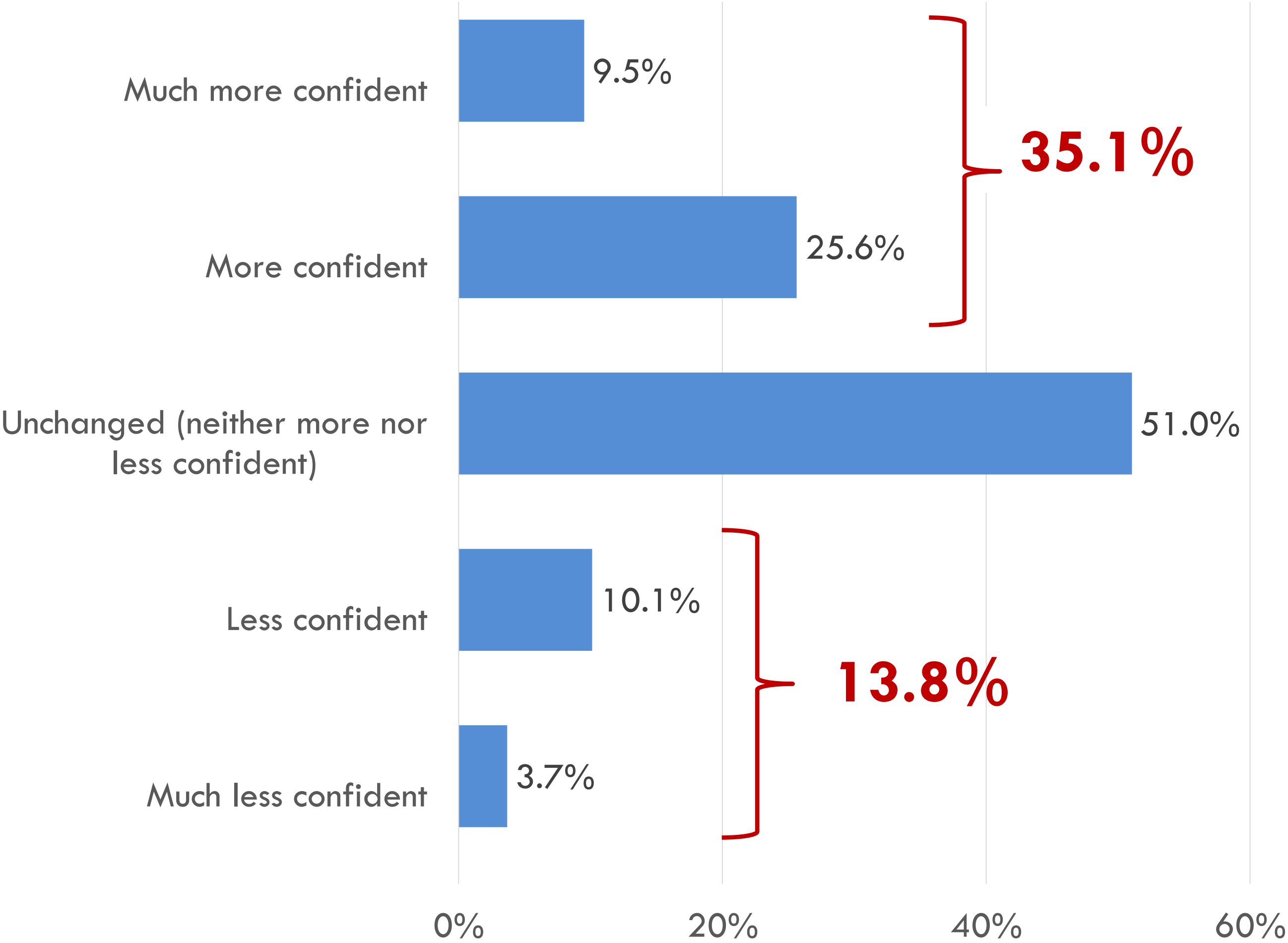
Neutral





CONFIDENCE IN NAVIGATING THE CORONAVIRUS SITUATION

Question: Over the PAST THREE (3) MONTHS, has your confidence that you can navigate the Coronavirus situation safely changed? (Select one to complete the sentence)

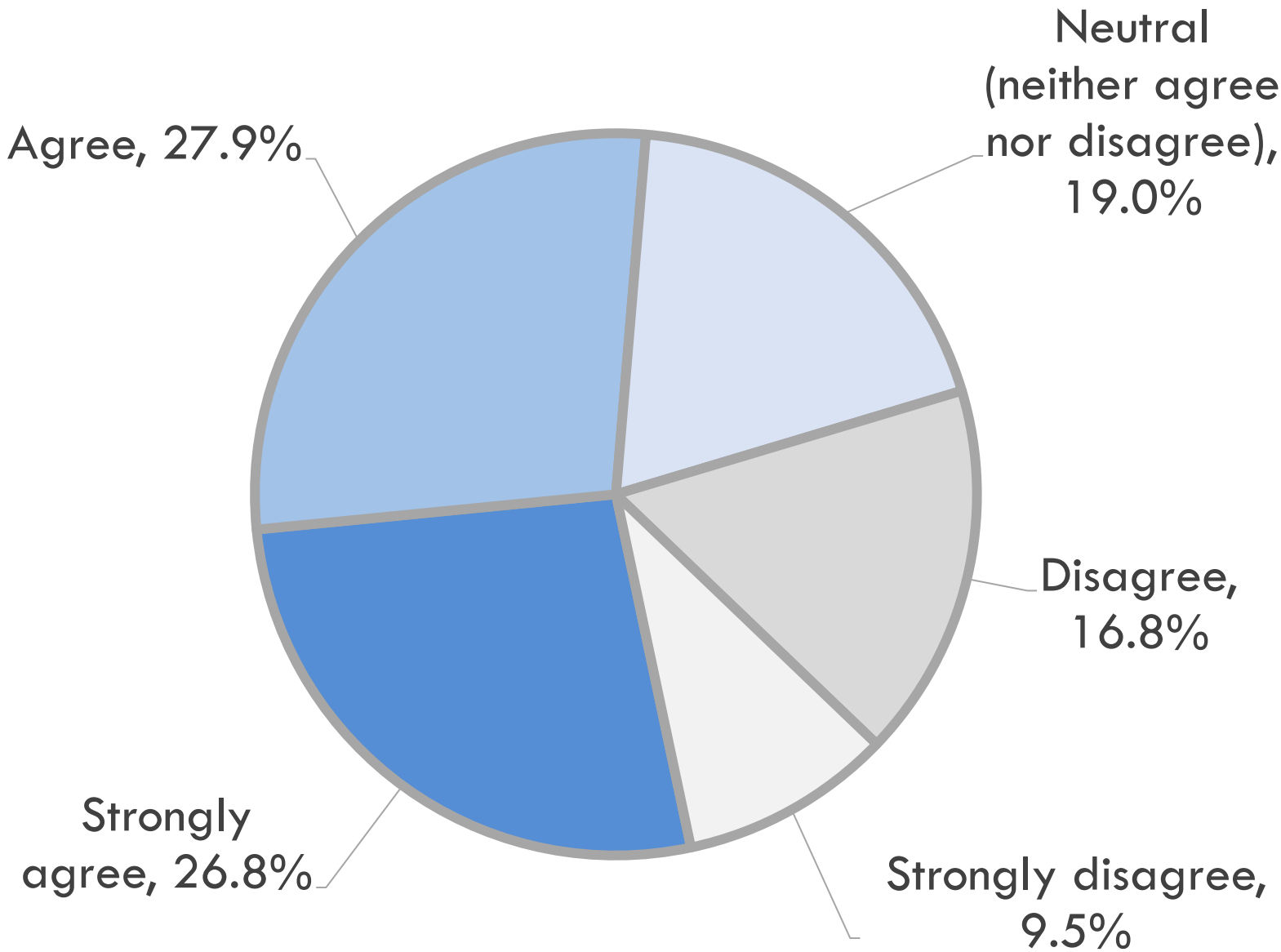


(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

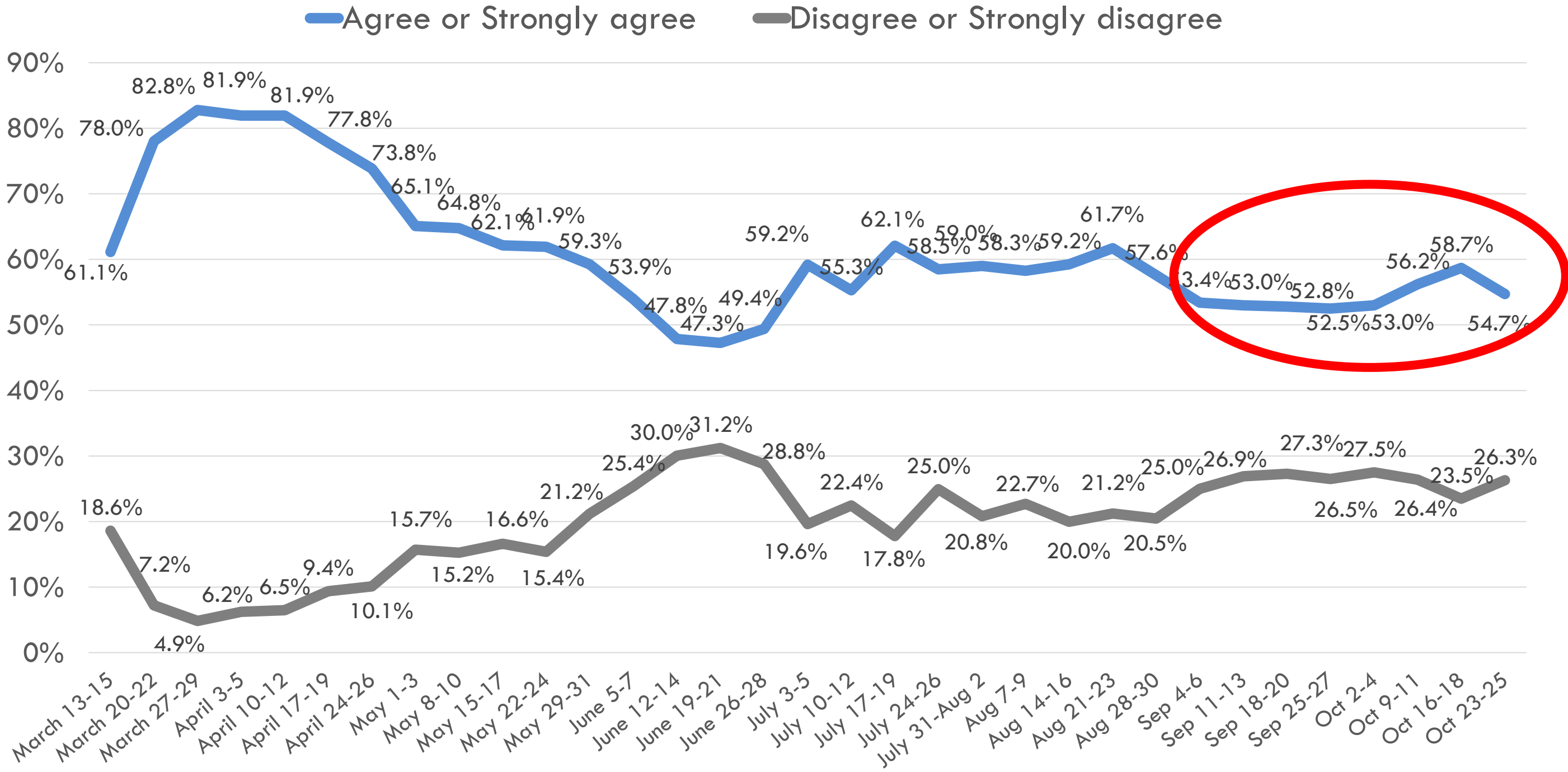
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



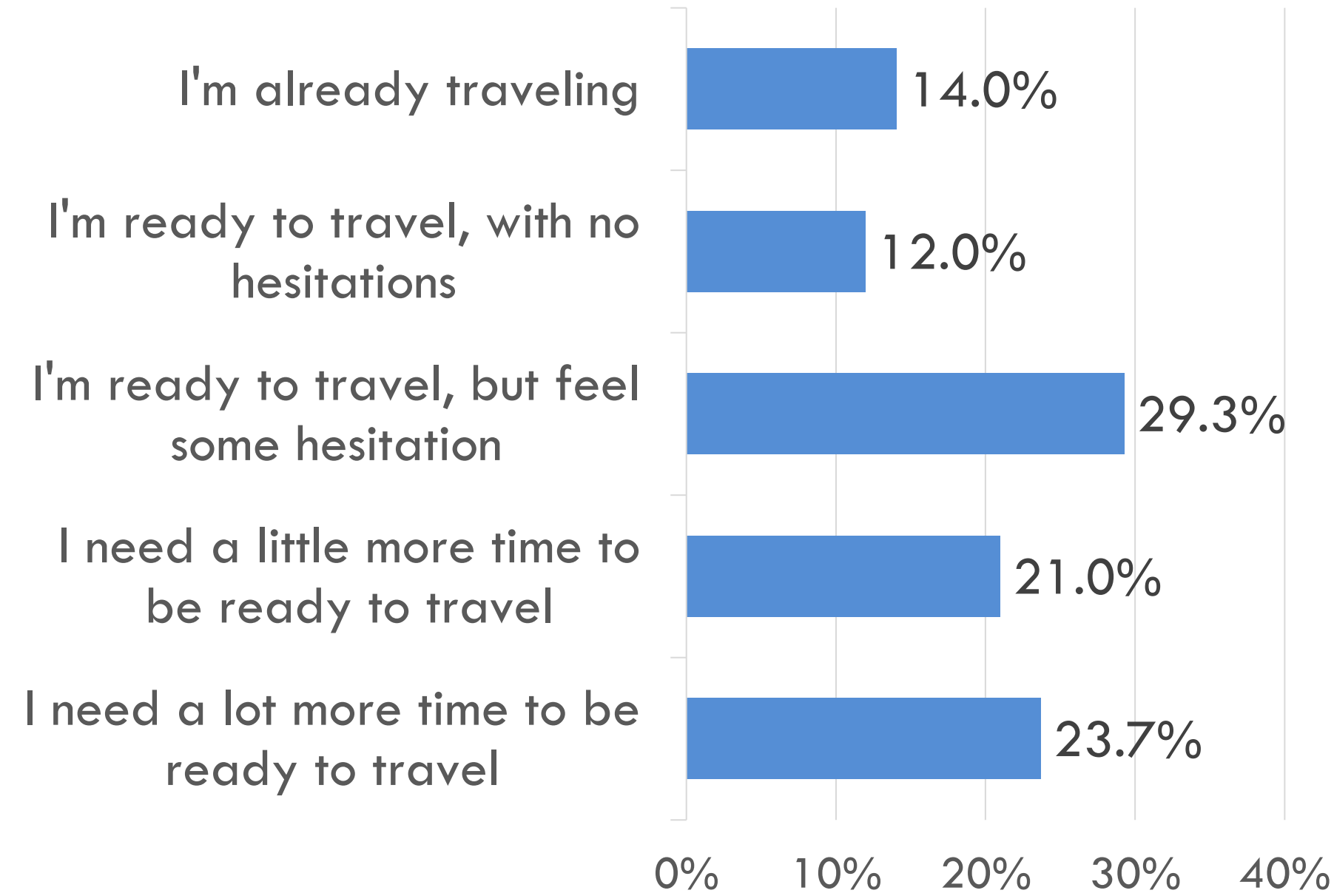
(Base: Waves 1-33. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

Historical data



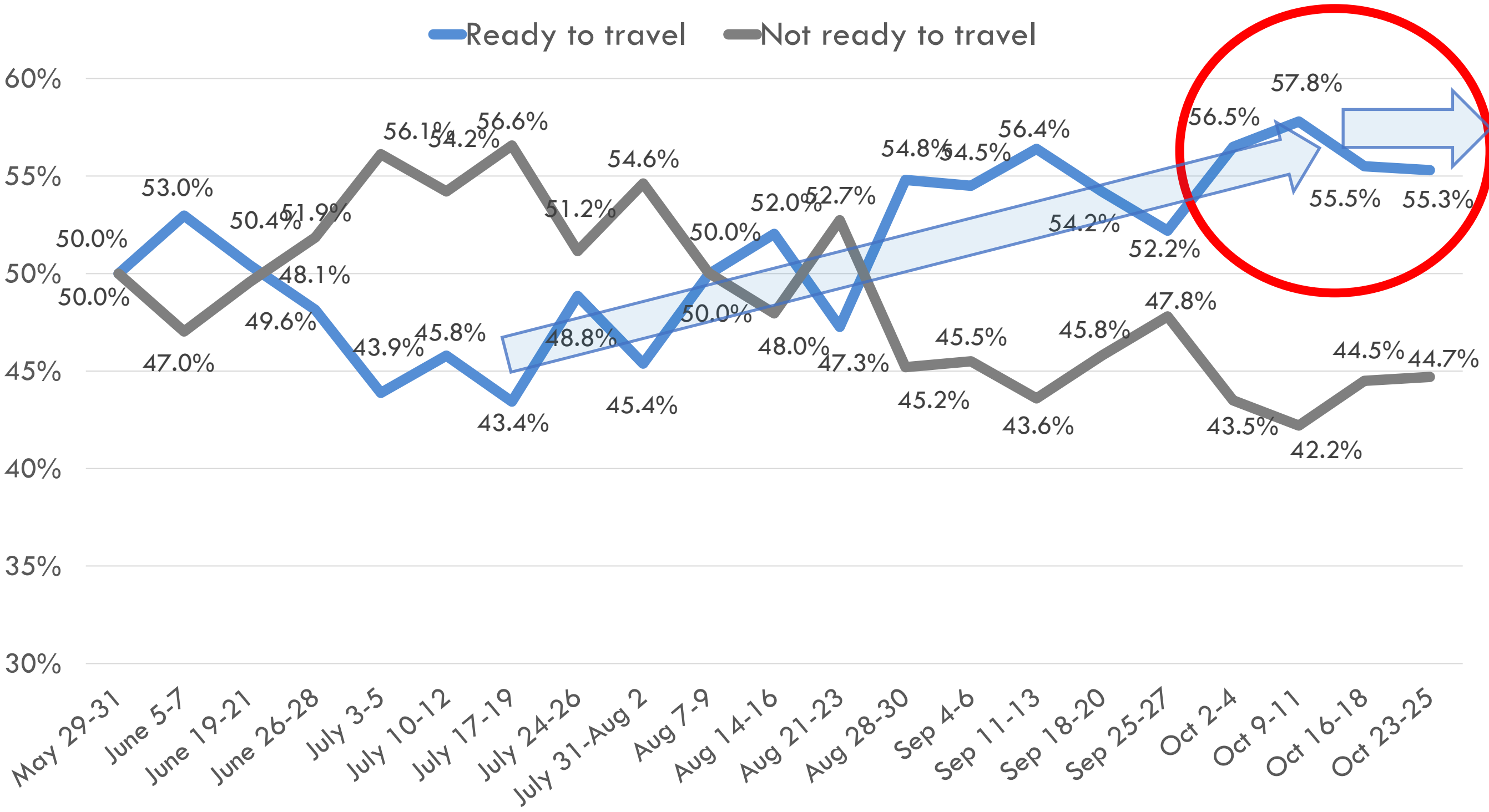
TRAVEL STATE-OF-MIND

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



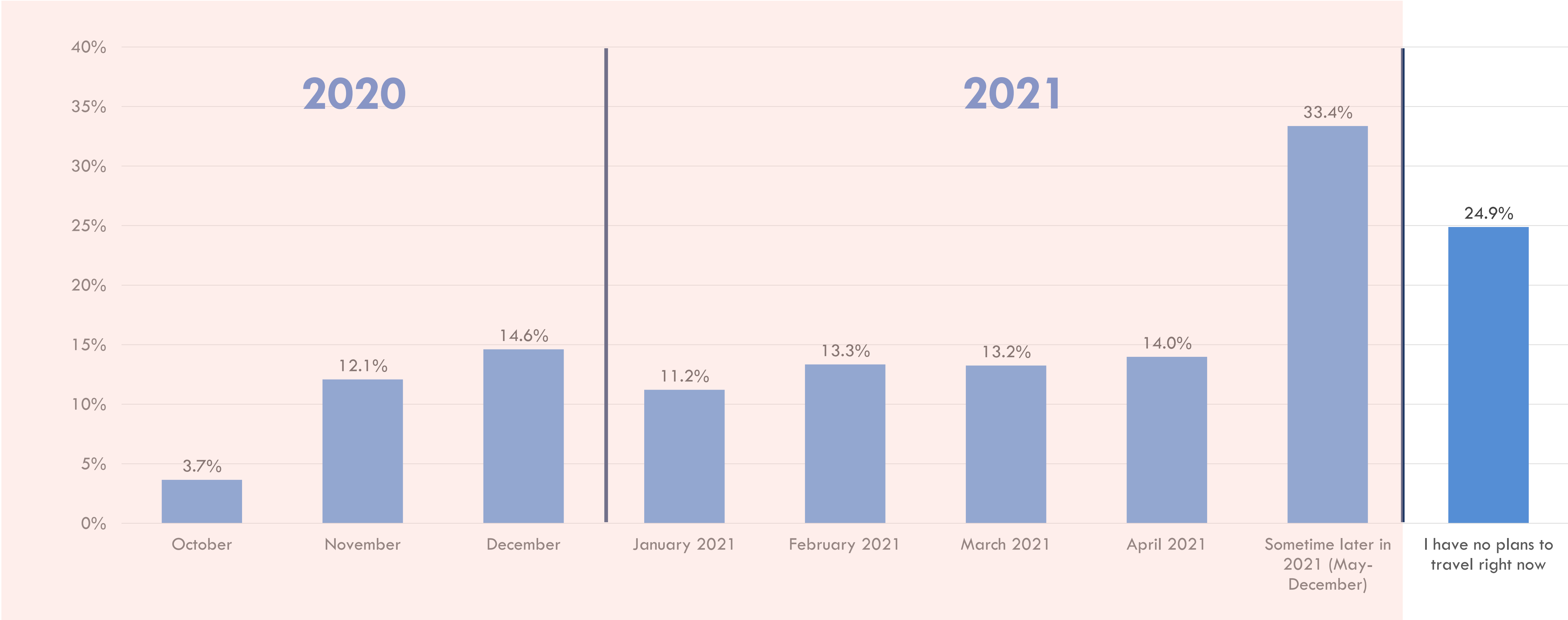
(Base: Waves 12-13 and 15-33. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

Historical data



UPCOMING TRAVEL PLANS

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

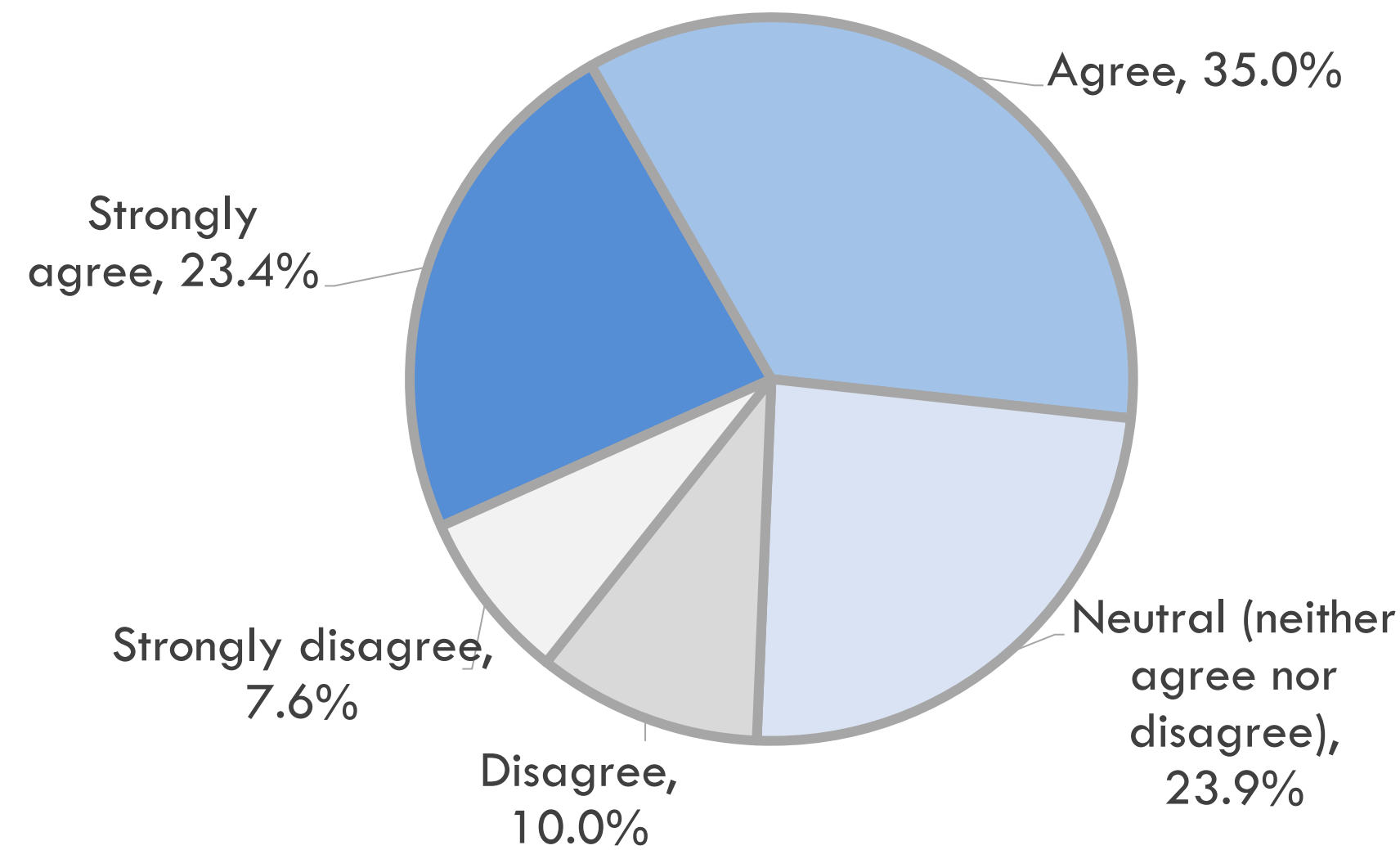


(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS

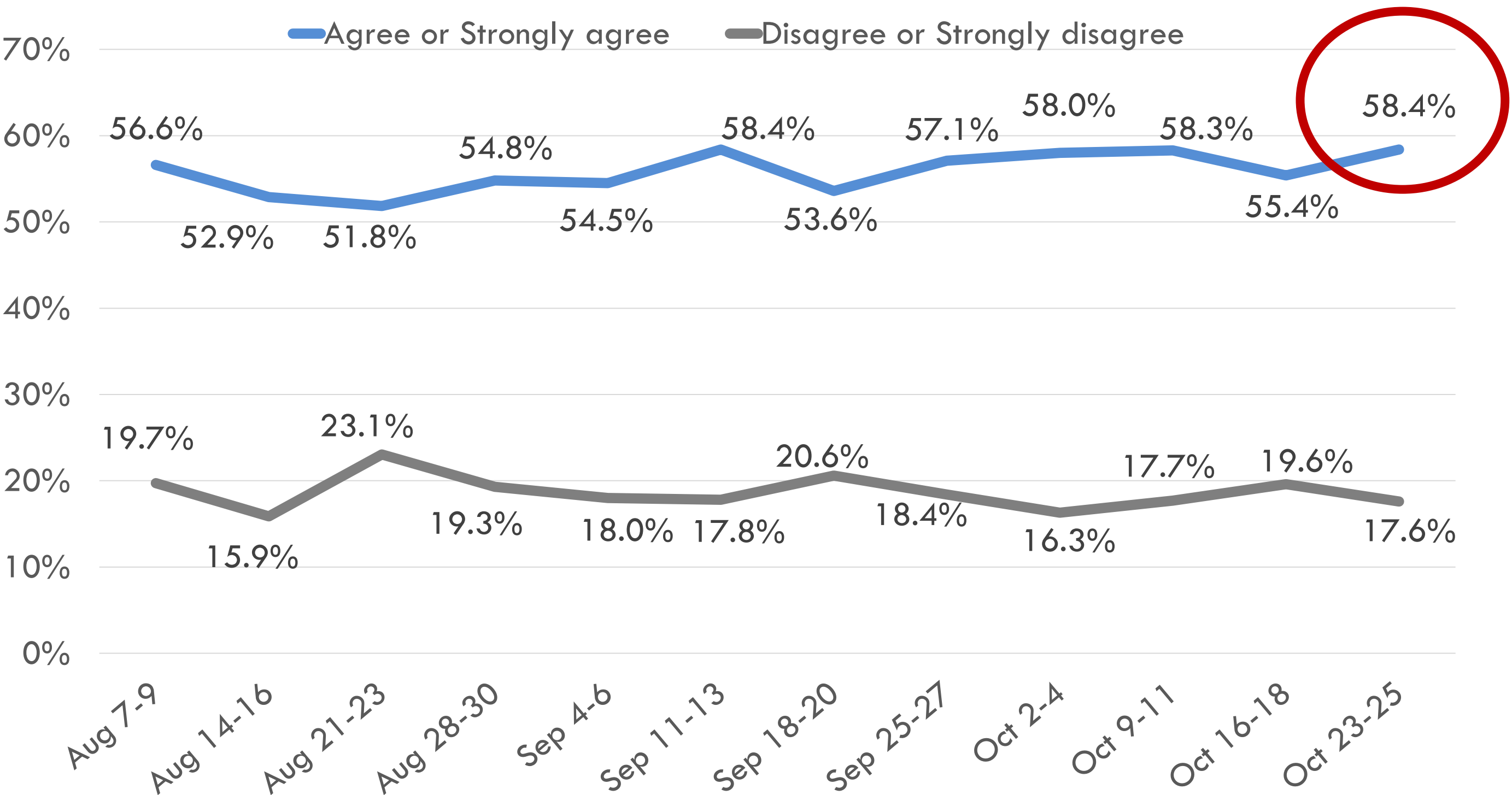
How much do you agree with the following statement?

Statement: Having a vacation scheduled in the next six months would make me feel there is something happy to look forward to.



(Base: Waves 22-33. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204 and 1,203 completed surveys.)

Historical data



A woman with long dark hair, wearing a grey turtleneck sweater and a light blue surgical face mask, is seated at a table. Her hands are clasped together on the table. In front of her is a plate of food, including what appears to be a fried item and some greens. The background is blurred, showing an indoor setting with warm lighting.

KEY TAKEAWAYS

1. Despite recent weakness in traveler sentiment around near-term travel. A segment of travelers appear to be learning to cope, reporting increased confidence in their ability to manage the pandemic.
2. Pandemic-related concerns about health have increased somewhat in the past three weeks.
3. Similarly, concerns about personal finances and the economy have increased.
4. The “second wave” of the pandemic appears to have increased the belief that the Coronavirus situation will worsen in the next month.

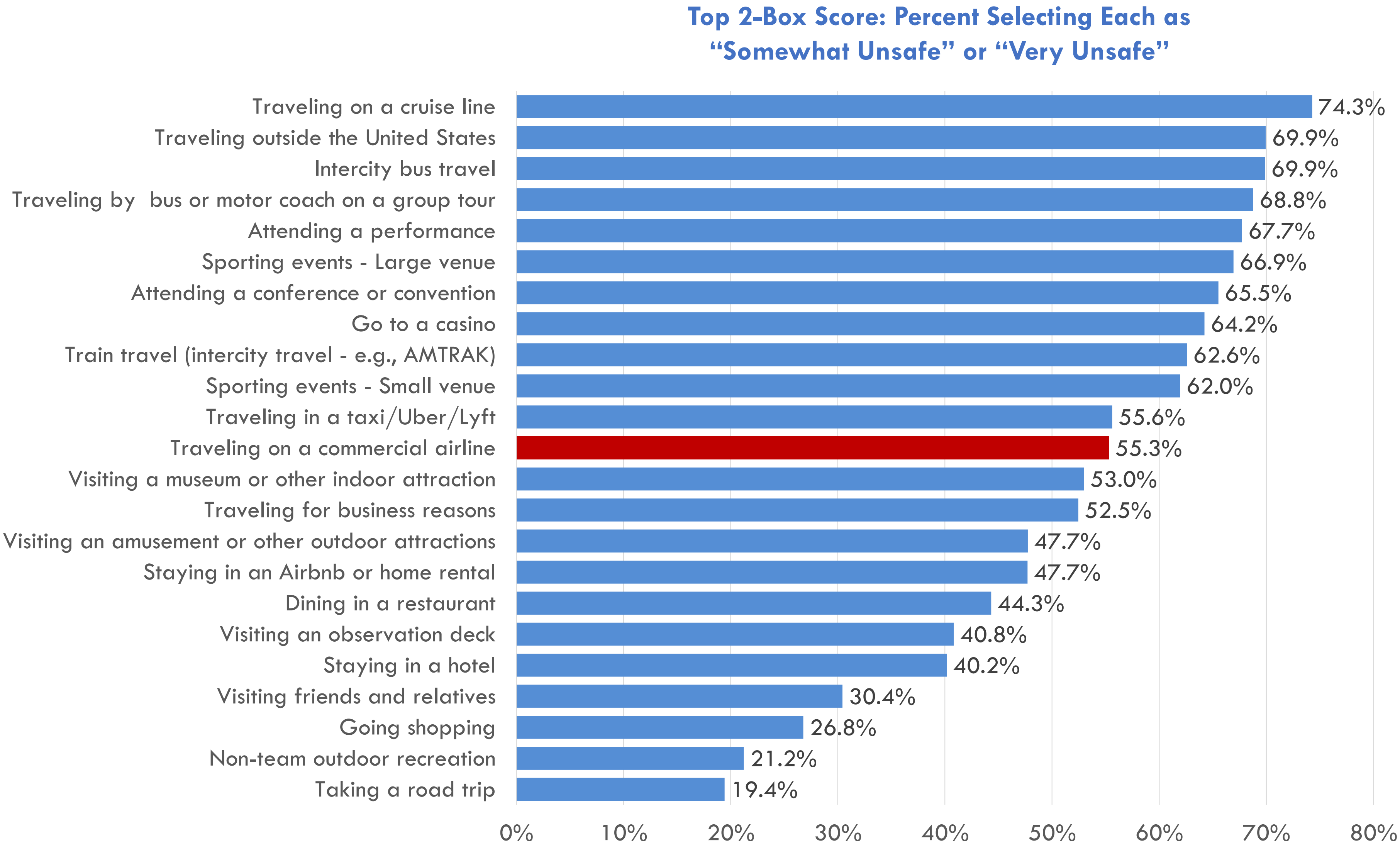


Commercial Air Travel

PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 33)

Question: At this moment, how safe would you feel doing each type of travel activity?

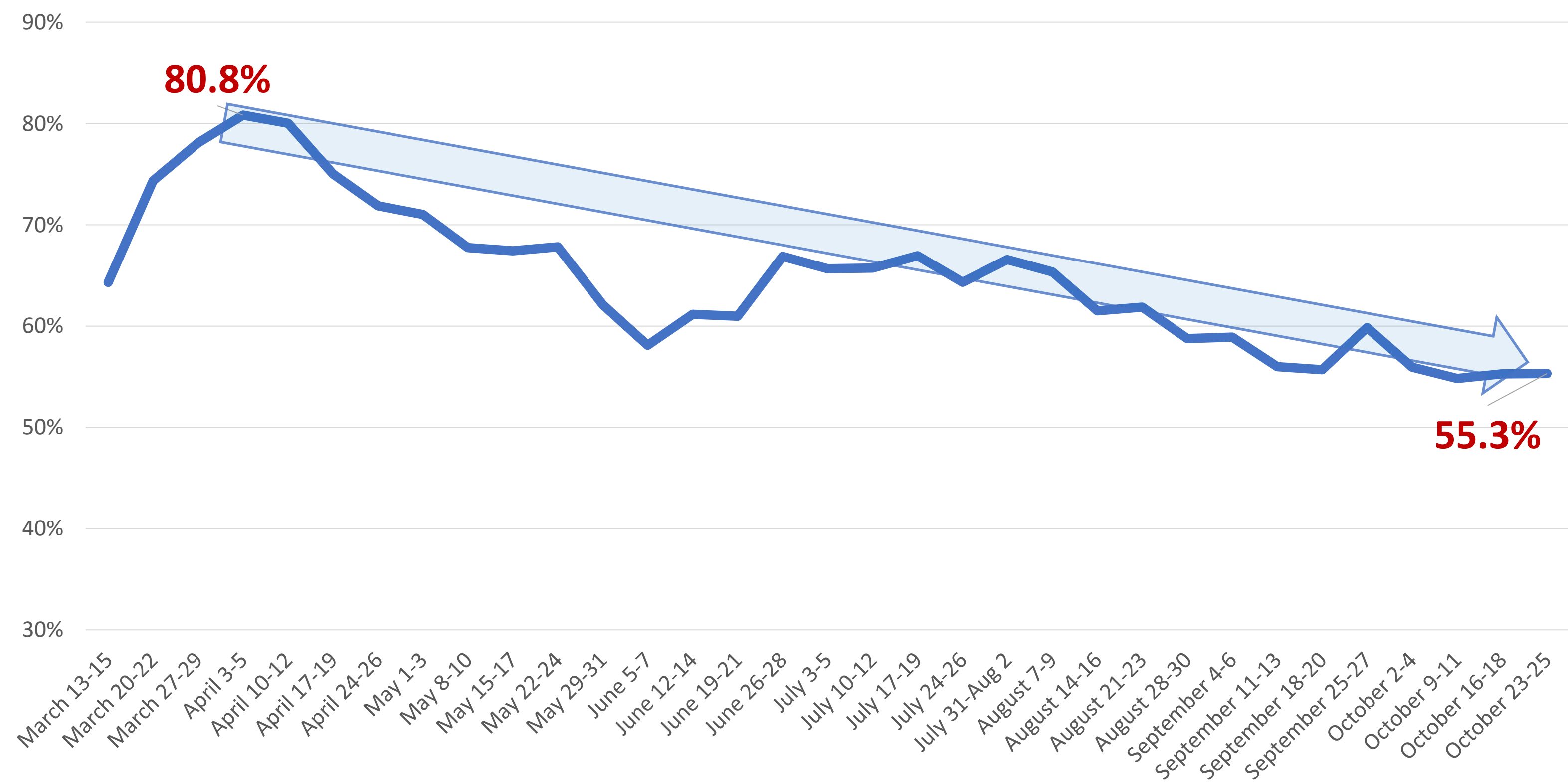
(Base: Wave 33 data. All respondents, 1,203 completed surveys.
Data collected Oct 23-25, 2020)



PERCEIVED SAFETY OF COMMERCIAL AIR TRAVEL: TIME SERIES

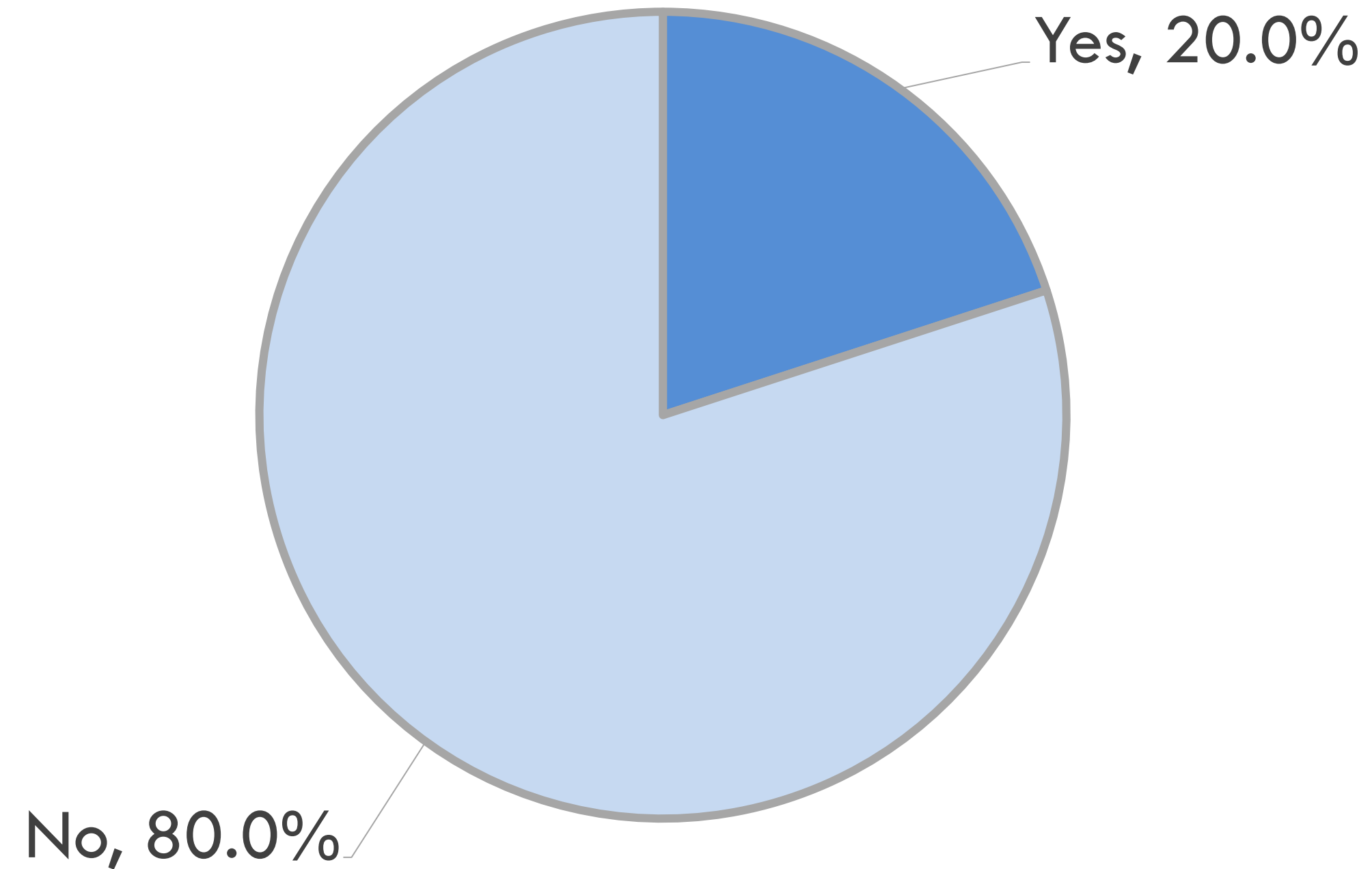
Question: At this moment, how safe would you feel doing each type of travel activity?

Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”



AIR TRAVEL DURING THE PANDEMIC

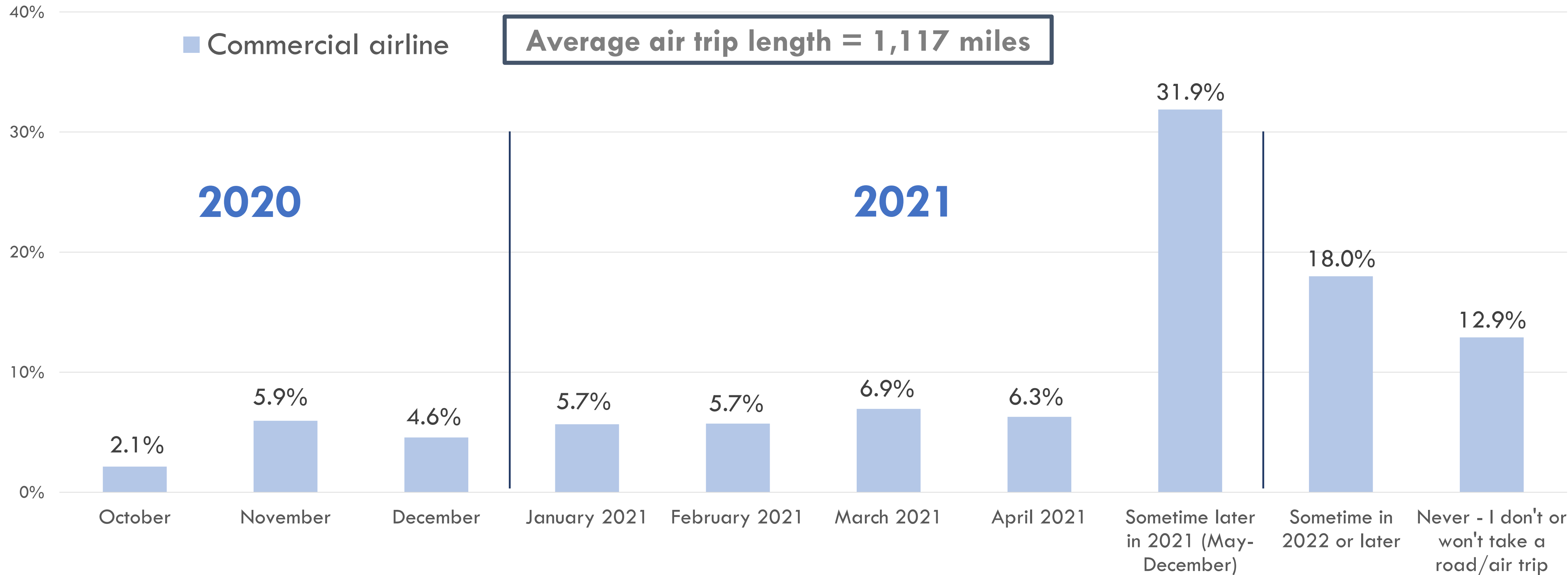
Question: Have you traveled on a commercial airline since the start of the Coronavirus pandemic (March 2020 to today)?



(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

ROAD & AIR TRIPS EXPECTED

Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?



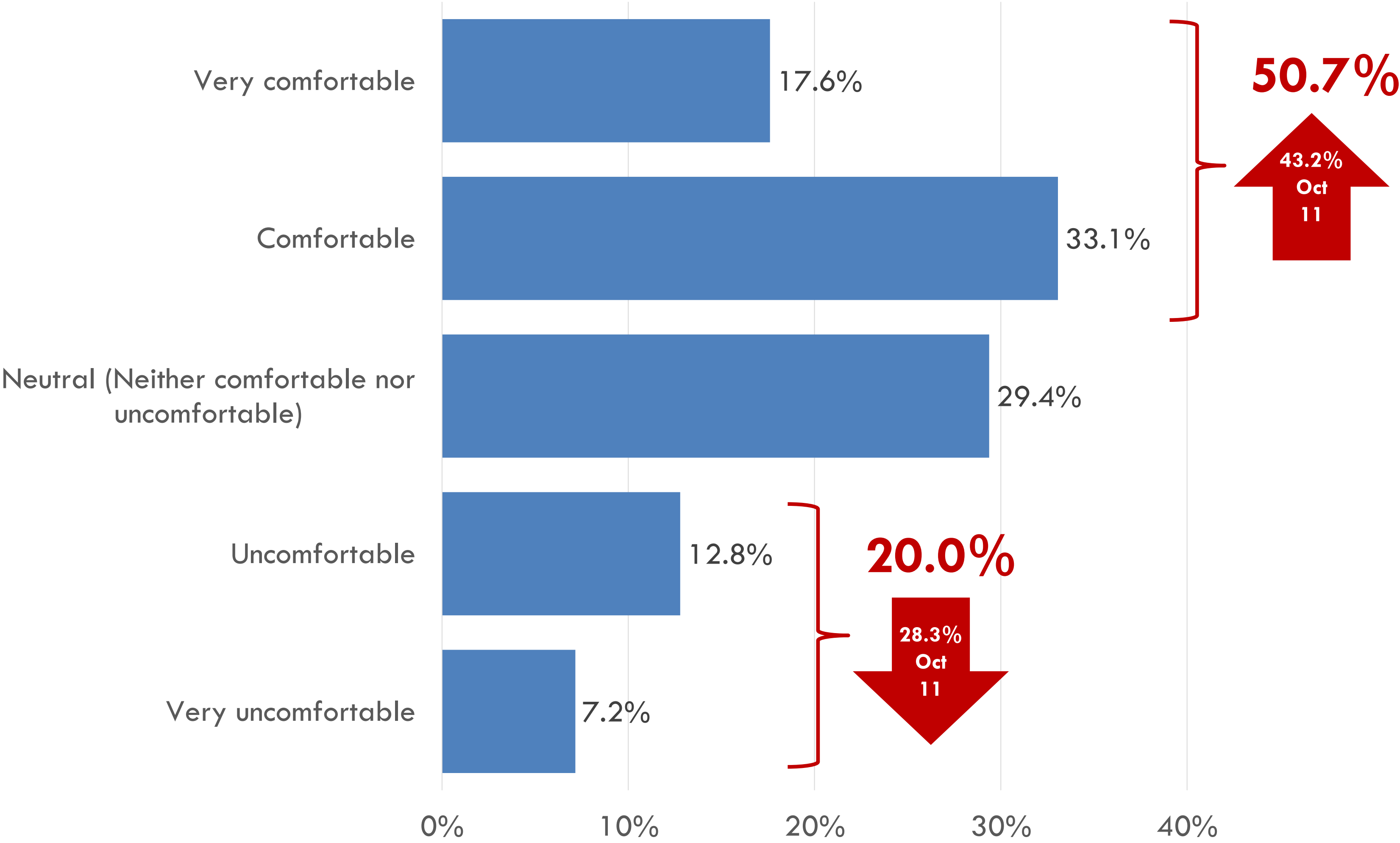
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

COVID TESTS AT AIRPORTS

Question: If a commercial airline required all passengers to take a COVID-19 test prior to boarding the plane, how comfortable would you be taking a flight? (Select one)

(Assume all passengers must pass a fast COVID-19 test at the airport on the day of the flight)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



TRAVEL

Southwest Airlines no longer blocking middle seats starting Dec. 1



Thursday, October 22, 2020 1:07PM



EMBED <> MORE VIDEOS ▶

In this video, take a look at the sanitization process Southwest adopted early in the pandemic.

The middle seat is making a comeback at Southwest Airlines.

The Dallas, Texas - based company announced Thursday that starting Dec. 1, it will resume the middle seat on flights.

"Aligned with science-based findings from trusted medical and aviation organizations, we will resume selling all available seats for travel beginning December 1, 2020," said Gary C. Kelly, chairman of the board and chief executive officer. We are pairing this change with enhanced flexibility for customers on



Southwest Airlines posts biggest-ever loss as coronavirus slams demand

Leslie Josephs • 2 days ago



RELATED QUOTES

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- Despite its biggest loss ever, Southwest Airlines was able to cut its cash burn.
- Bookings have improved in recent months, the carrier said, but it warned a recovery is still far off.
- The Dallas-based carrier recently asked unionized employees to take a 10% pay cut to avoid furloughs through next year.



© Provided by CNBC A Southwest Airlines jet leaves Midway Airport on in Chicago, Illinois.

Southwest Airlines on Thursday posted its biggest loss ever after the coronavirus pandemic hurt the summer travel season, but the airline cut its cash burn.

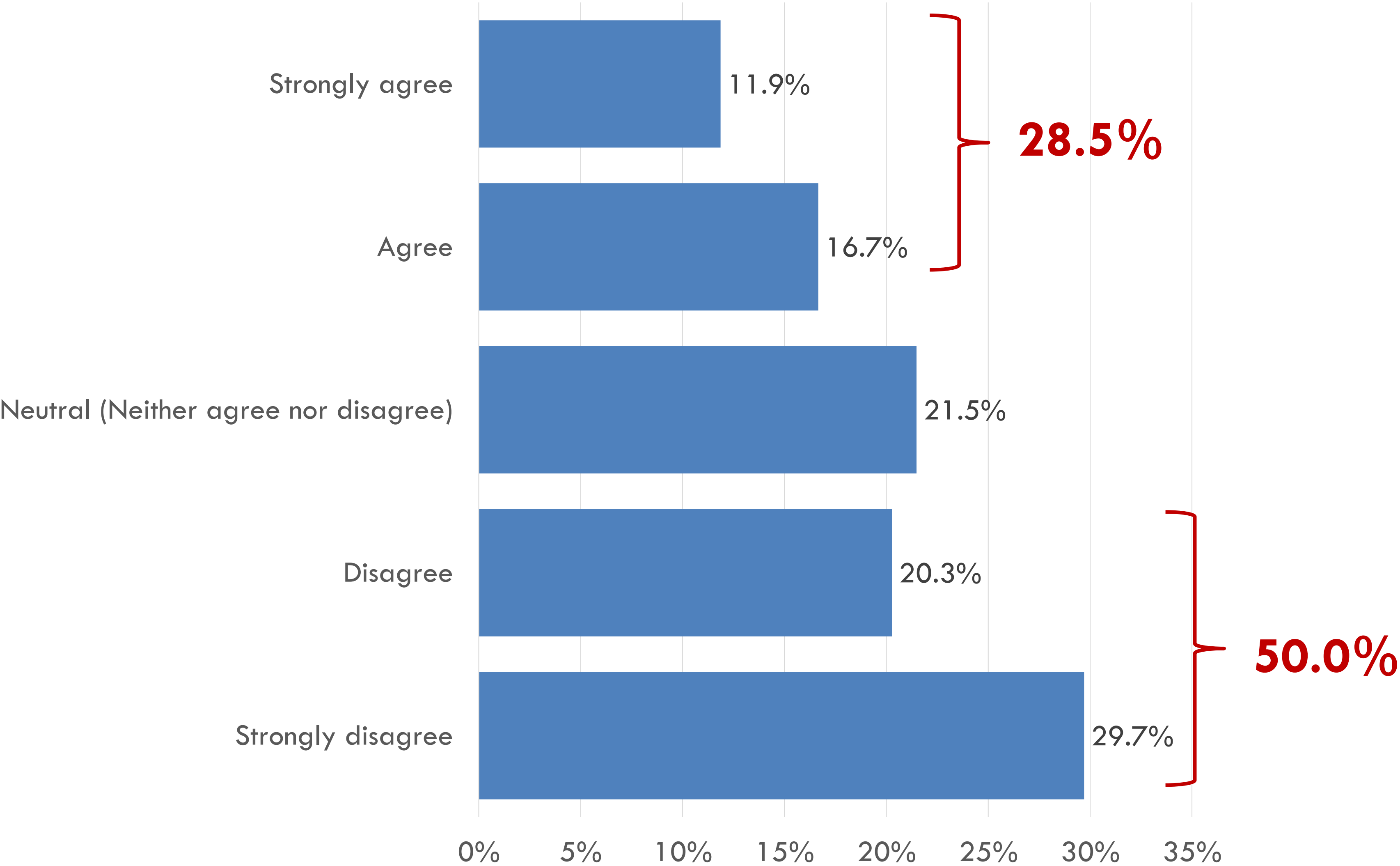
Later, American Airlines reported a [\\$2.4 billion third-quarter loss](#). U.S. airlines have lost more than \$10 billion in the third quarter and executives have warned it could take years for the business to fully recover.

AIRLINE POLICIES ON PASSENGER COUNT LIMITATIONS

Question: Do you approve of airline decisions to **NO LONGER LIMIT** the number of passengers in their planes? (Select one to fill in the blank)

I _____ with airline policies to no longer limit the number of passengers on flights.

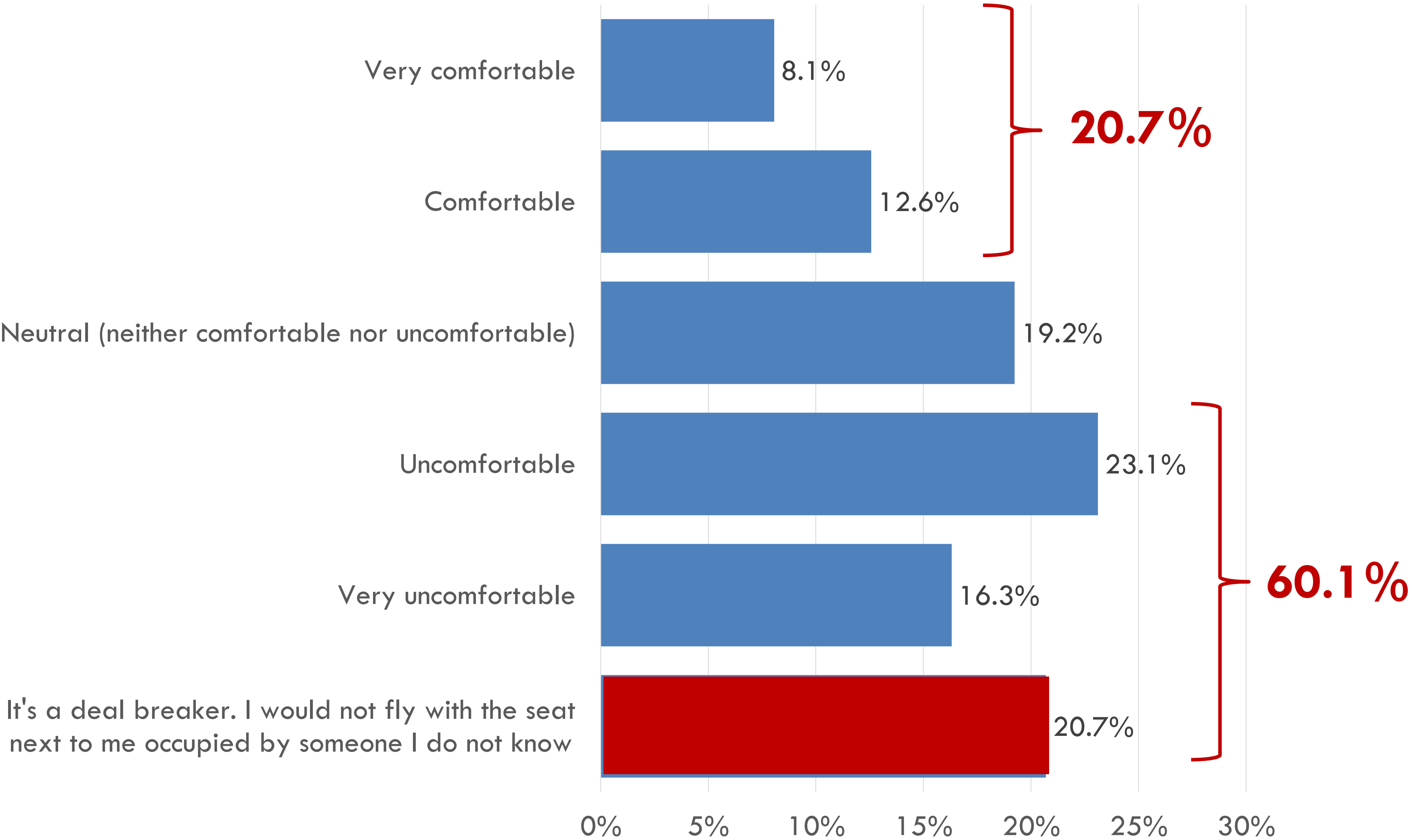
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



COMFORT WITH FULL MIDDLE SEATS ON AIRLINES

Question: How comfortable would you be flying on a commercial aircraft with the seat next to you occupied by someone you did not know? (Select one)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)





THOSE WHO ARE ALREADY TRAVELING OR READY TO TRAVEL WITHOUT HESITATION

- **The majority are confident that they can travel safely in the current environment**
- **Since the onset of the pandemic, 40% have traveled on a commercial airline and 30% expect to take a commercial airline trip during the remainder of this year**
- **They agree with airline policies that no longer limit passenger capacity on flights**
- **About half would feel comfortable if they sat next to someone they didn't know on a flight**



THOSE WHO ARE NOT READY TO TRAVEL

- **The majority are not confident that they can travel safely in the current environment and they perceive traveling on a commercial airline as unsafe**
- **Nevertheless, 10% have traveled on a commercial airline since the onset of the pandemic**
- **They disagree with airline policies that no longer limit passenger capacity on flights**
- **They would feel uncomfortable or say it's a deal breaker if they were to sit next to someone they don't know on a flight**
- **However, nearly 40% would feel comfortable flying if commercial airlines required passengers to take and pass a COVID-19 test immediately prior to boarding a plane**



KEY TAKEAWAYS

1. In terms of perceived danger, air travel is seen as a middle-tier travel activity, with over half (55%) of travelers saying it is either somewhat or very dangerous.
2. Perceptions of air travel being dangerous have lessened significantly during the course of the pandemic. Still, this is a major impediment to travel.
3. Only 1-in-5 travelers report having used commercial airlines during the pandemic.
4. Required COVID-19 tests before flights appear to be a popular option with travelers, with half saying they would be comfortable with flying if this protocol was in place.
5. Airline policies allowing increased passenger volume, including selling middle seats, remain unpopular with travelers



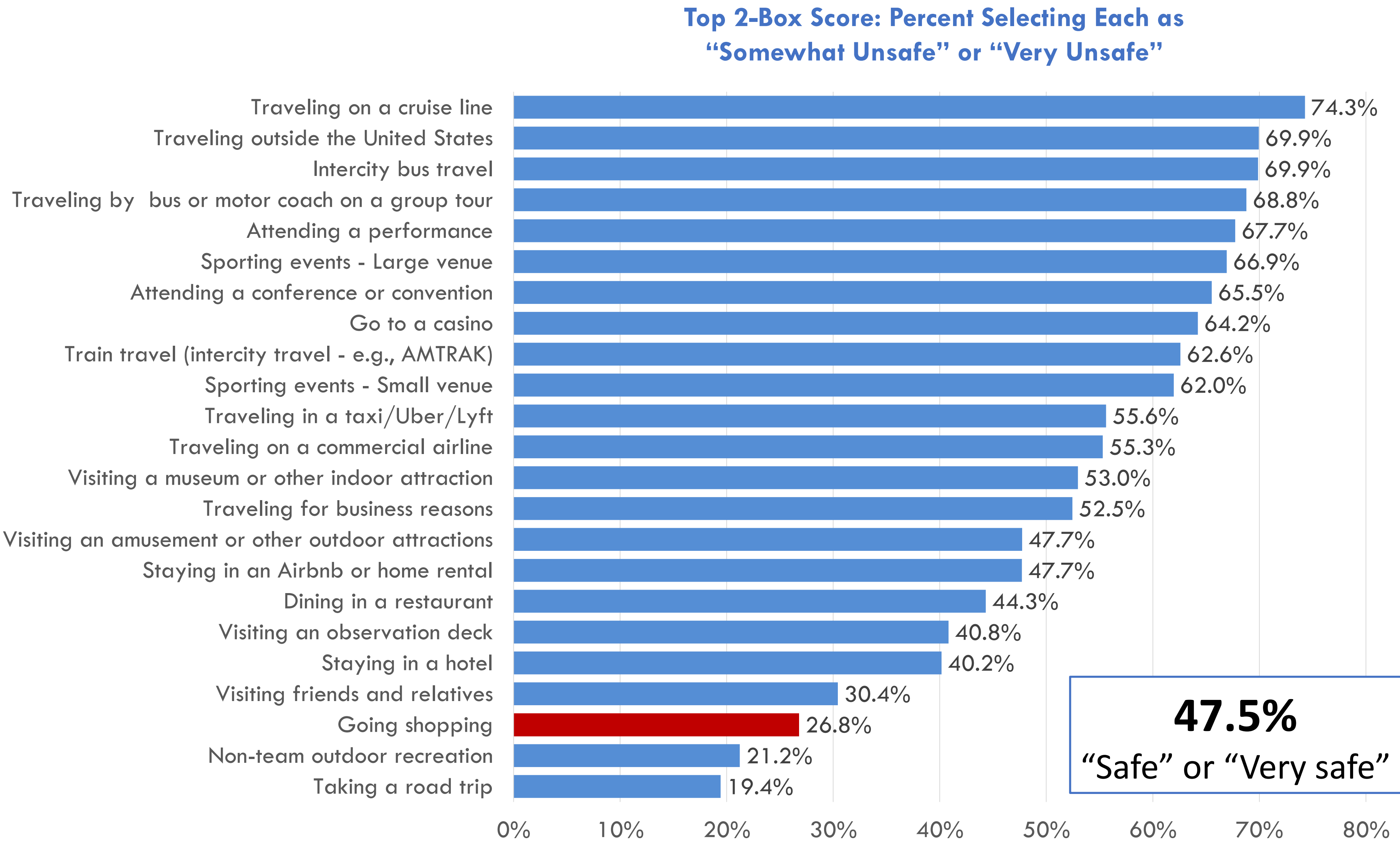
Retail Shopping in the Pandemic



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 33)

Question: At this moment, how safe would you feel doing each type of travel activity?

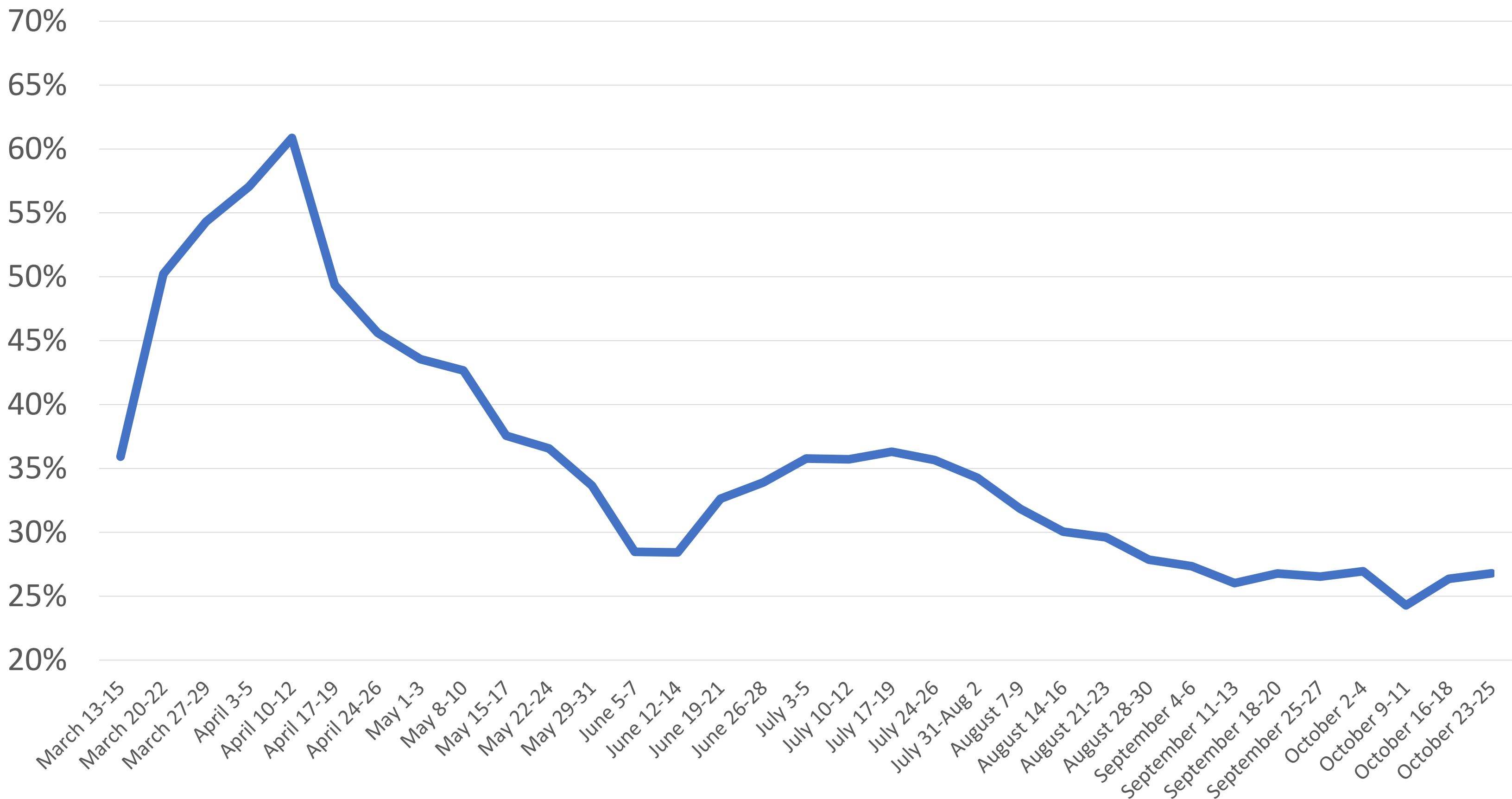
(Base: Wave 33 data. All respondents, 1,203 completed surveys.
Data collected Oct 23-25, 2020)



PERCEIVED SAFETY OF SHOPPING: TIME SERIES

Question: At this moment, how safe would you feel doing each type of travel activity?

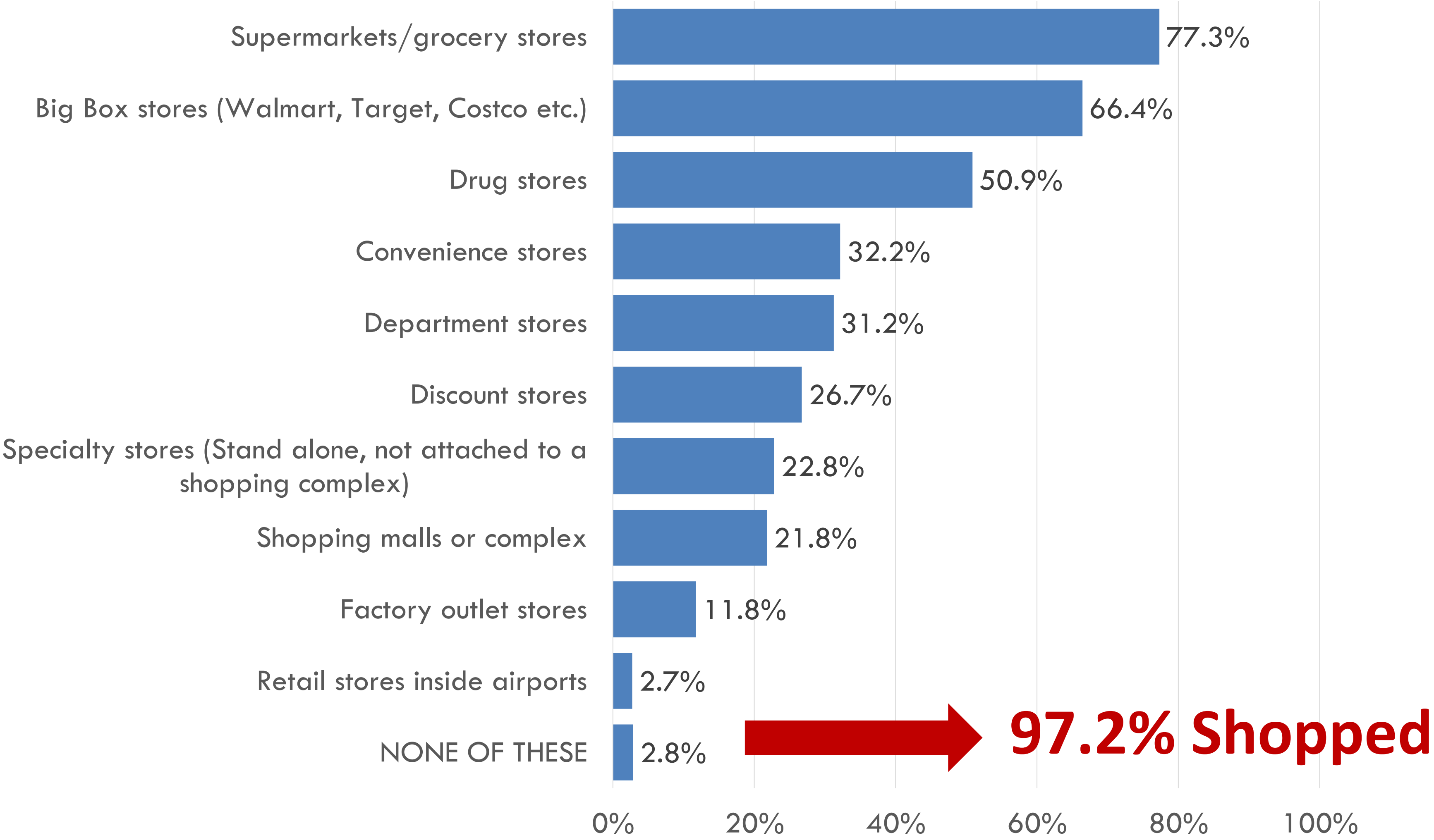
Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”



RETAIL STORES VISITED: PAST 6 MONTHS

Question: IN THE PAST SIX (6) MONTHS, in which types of retail stores have you shopped at for any reason? (Select all that apply)

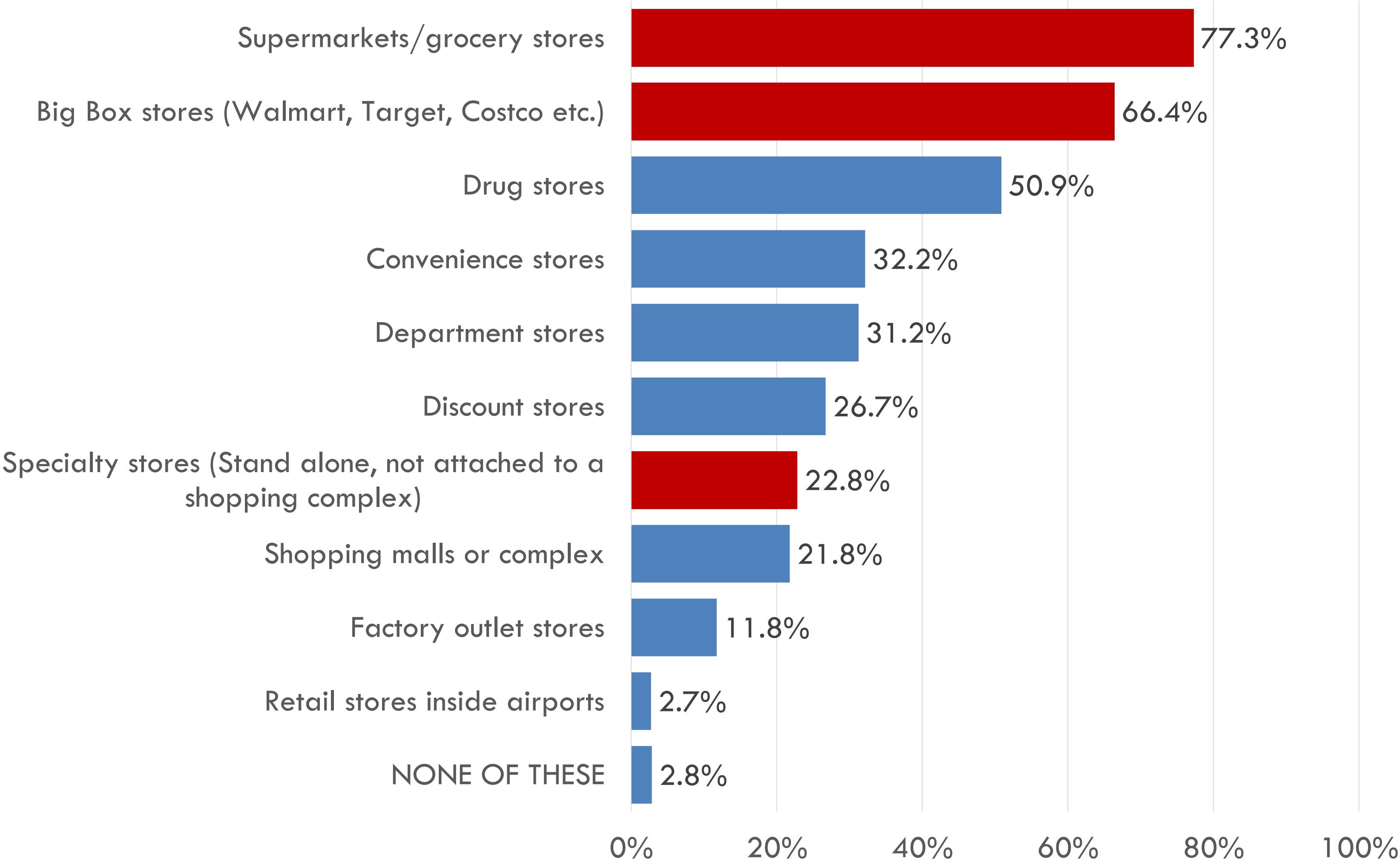
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



RETAIL STORES VISITED: PAST 6 MONTHS

Question: IN THE PAST SIX (6) MONTHS, in which types of retail stores have you shopped at for any reason? (Select all that apply)

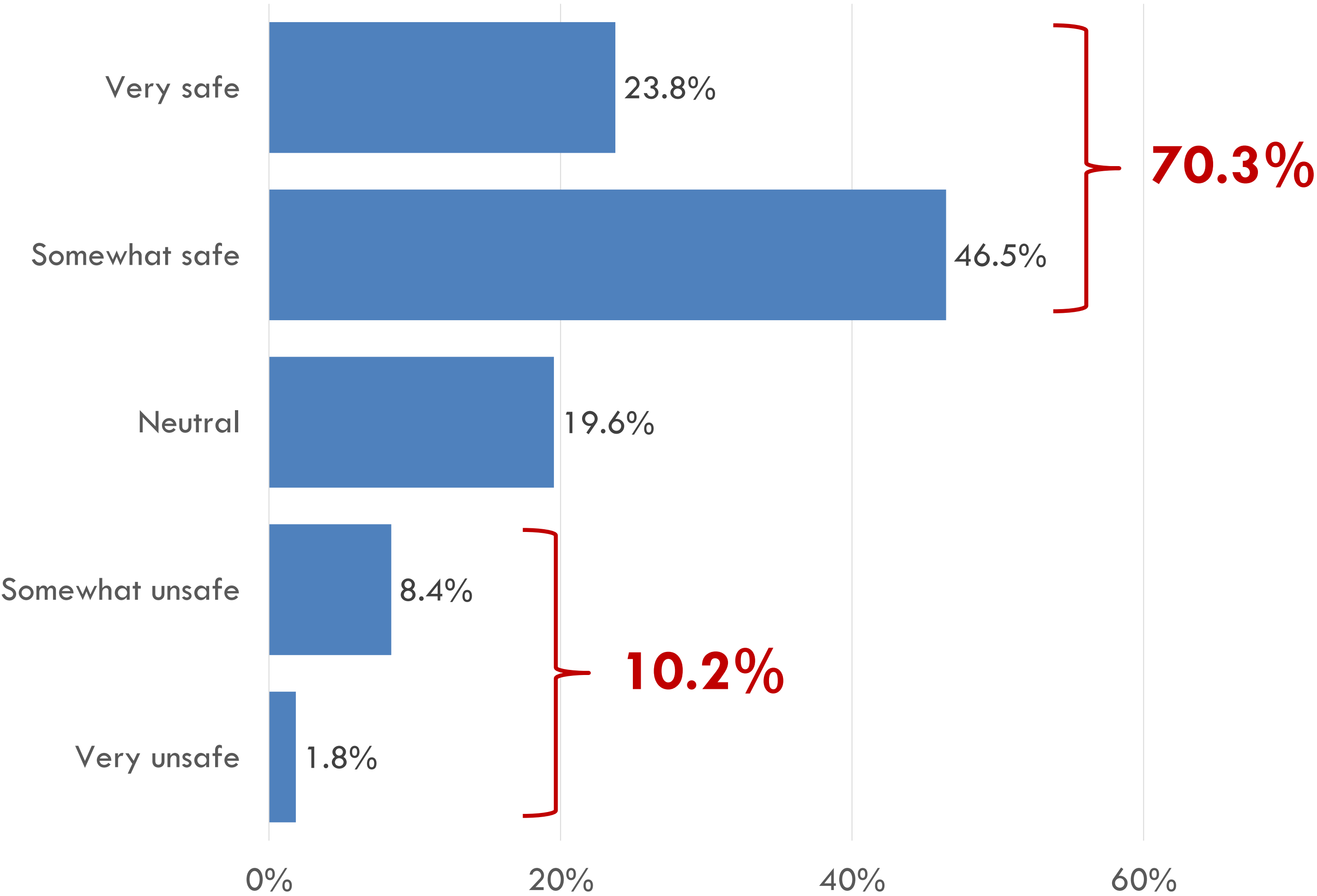
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



PERCEIVED SAFETY: SUPERMARKETS

Question: How safe did you feel the most recent time you shopped at a supermarket/grocery store? (Select one)

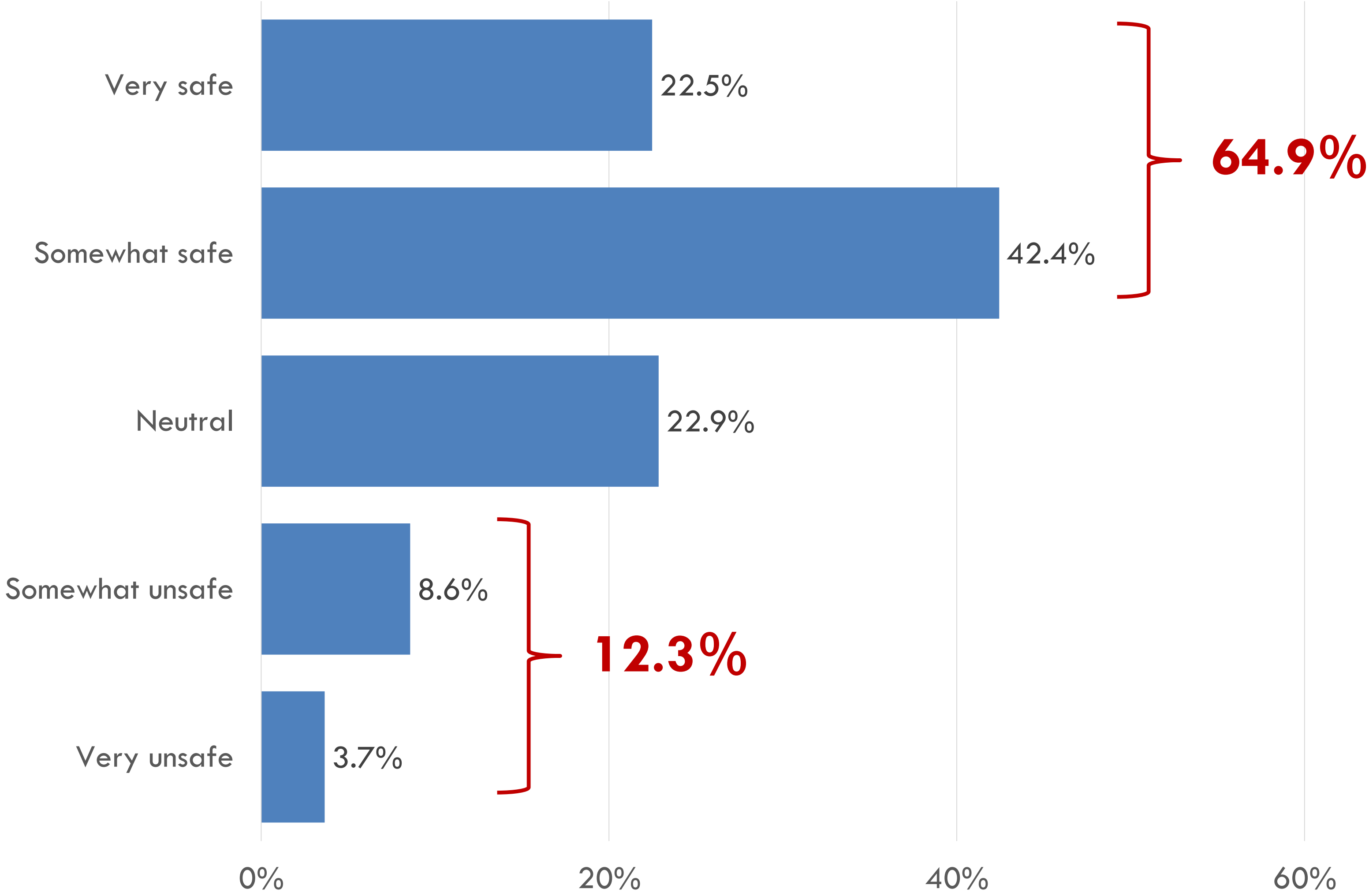
(Base: Wave 33 data. Respondents shopping in a supermarket (past 6 months), 947 completed surveys. Data collected Oct 23-25, 2020)



PERCEIVED SAFETY: BIG BOX STORES

Question: How safe did you feel the most recent time you shopped at a Big Box (Walmart, Target, etc.) store? (Select one)

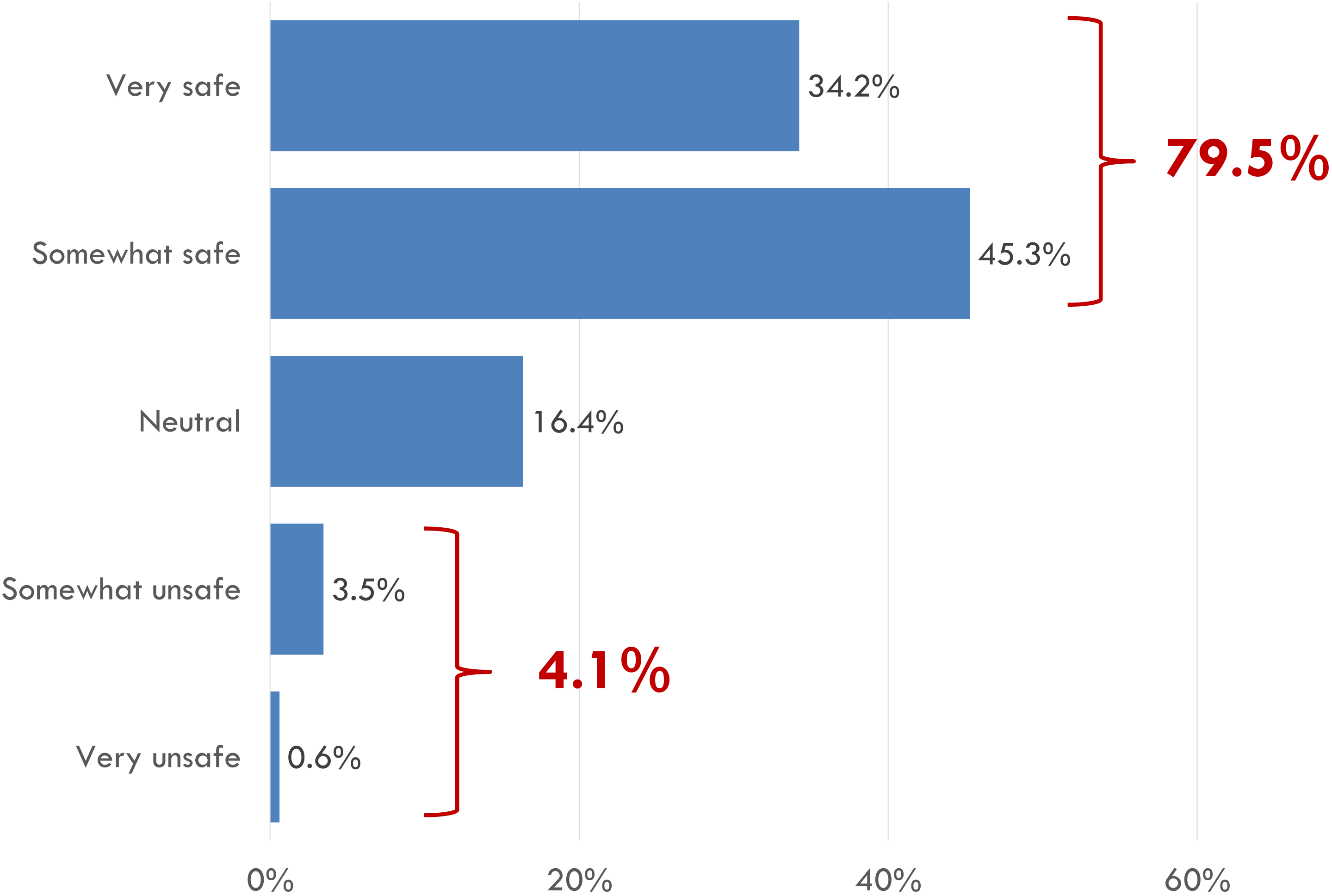
(Base: Wave 33 data. Respondents shopping in a big box store (past 6 months), 788 completed surveys. Data collected Oct 23-25, 2020)



PERCEIVED SAFETY: SPECIALTY STORES

Question: How safe did you feel the most recent time you shopped at a stand-alone specialty store? (Select one)

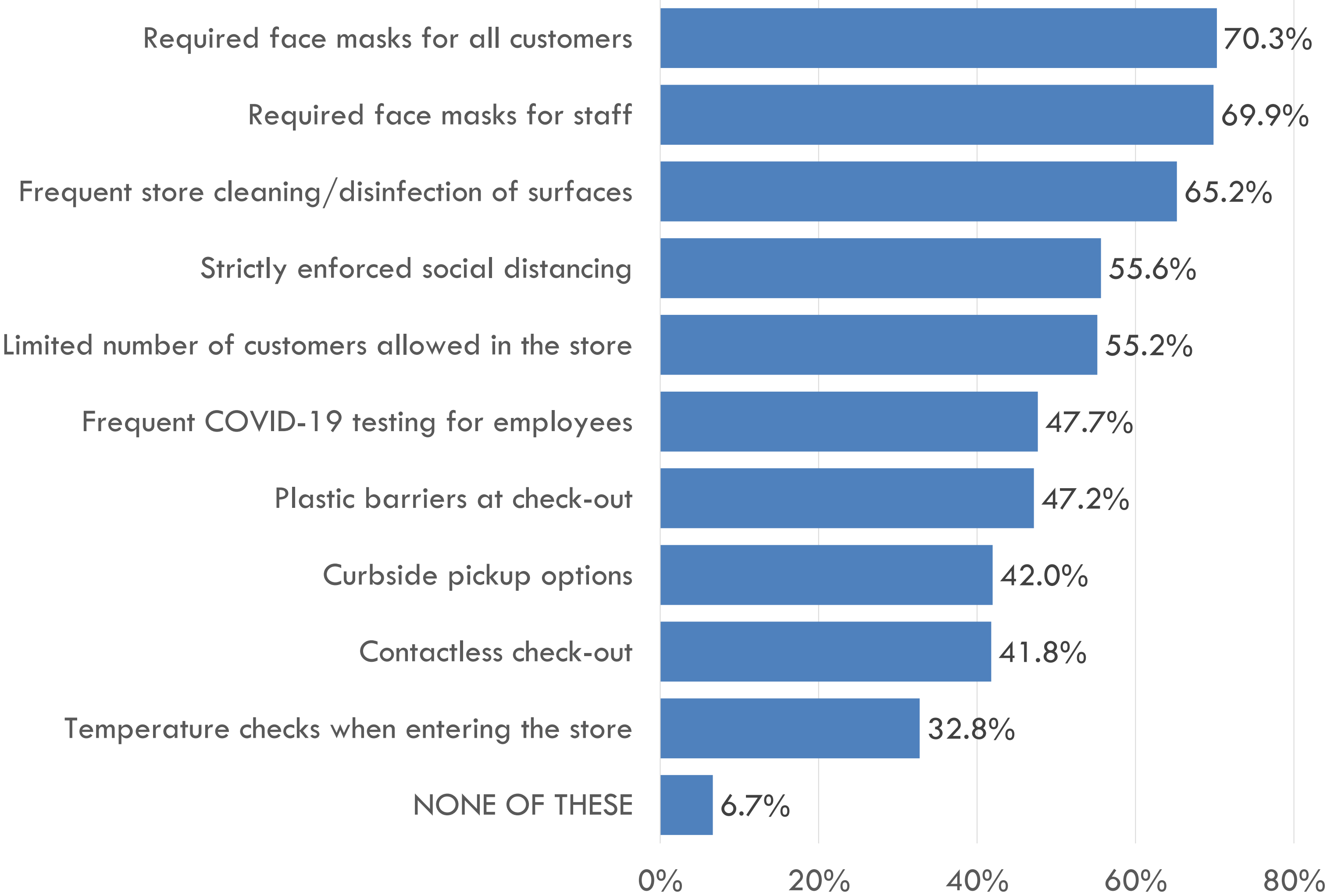
(Base: Wave 33 data. Respondents shopping in a specialty store (past 6 months), 274 completed surveys. Data collected Oct 23-25, 2020)



DESIRED RETAIL SAFETY MEASURES

Question: Which of these would you LIKE TO SEE as safety measures in retail stores? (Select all that apply)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



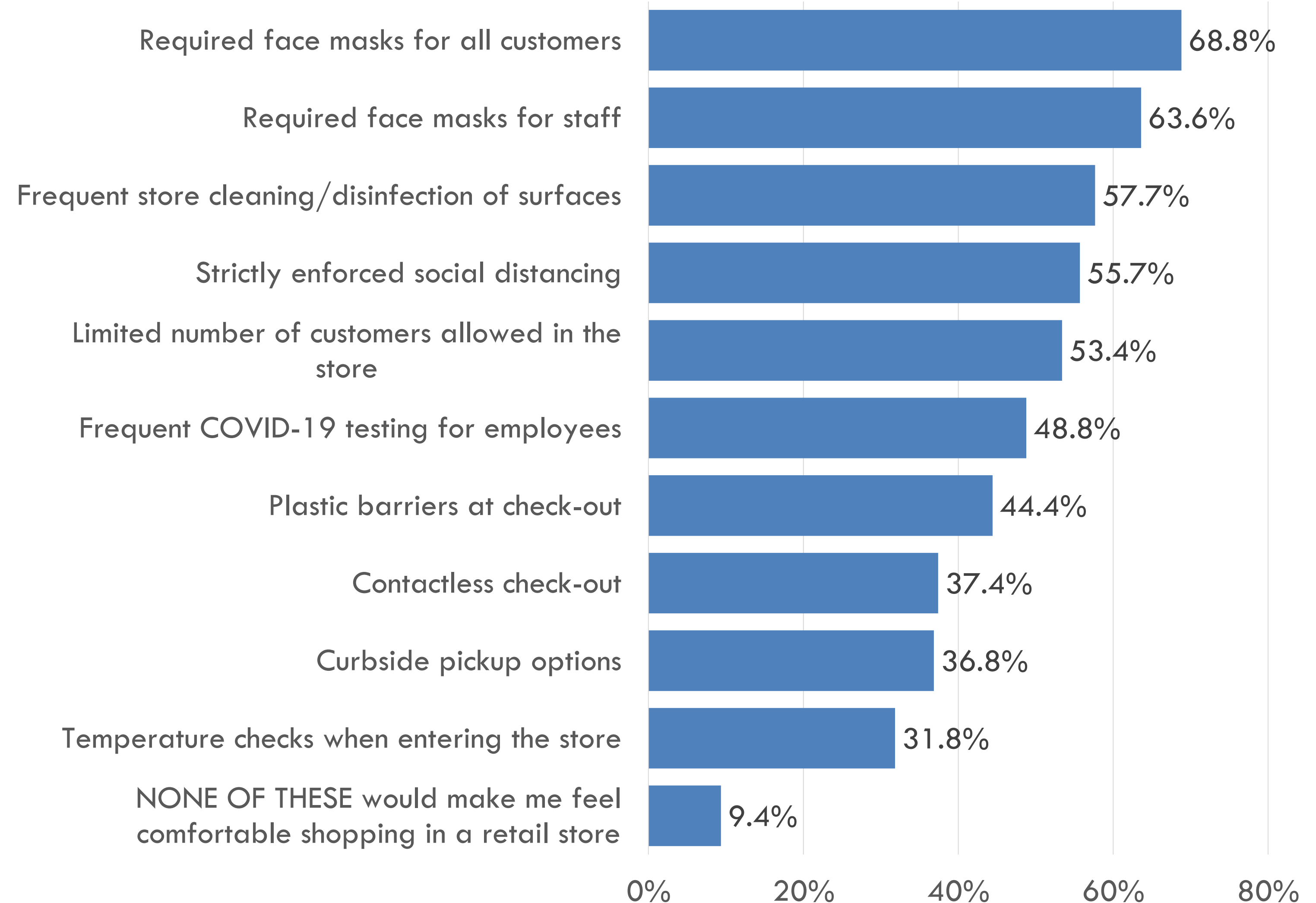
NECESSARY RETAIL SAFETY MEASURES

Question: Which of the following would be **ABSOLUTELY NECESSARY** for you to feel comfortable shopping in a retail store? (Select all that apply)

(Base: Wave 33 data. Respondents who see shopping as somewhat unsafe or very unsafe, 319 completed surveys. Data collected Oct 23-25, 2020)



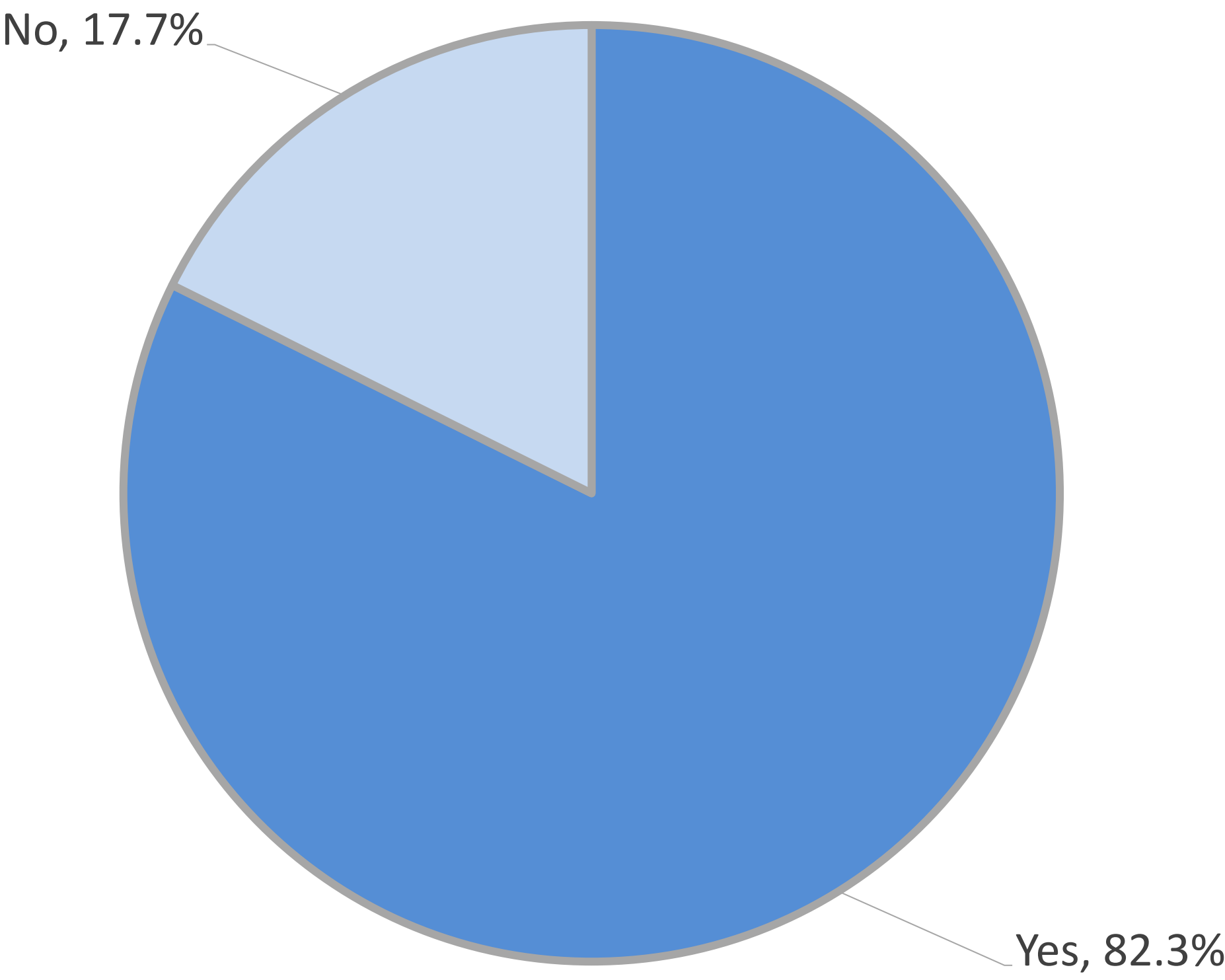
Asked only of those saying shopping was “somewhat unsafe” or “very unsafe”



SHOPPING LATER THIS YEAR

Question: During the remainder of 2020, will you GO SHOPPING in any retail stores for any reason?

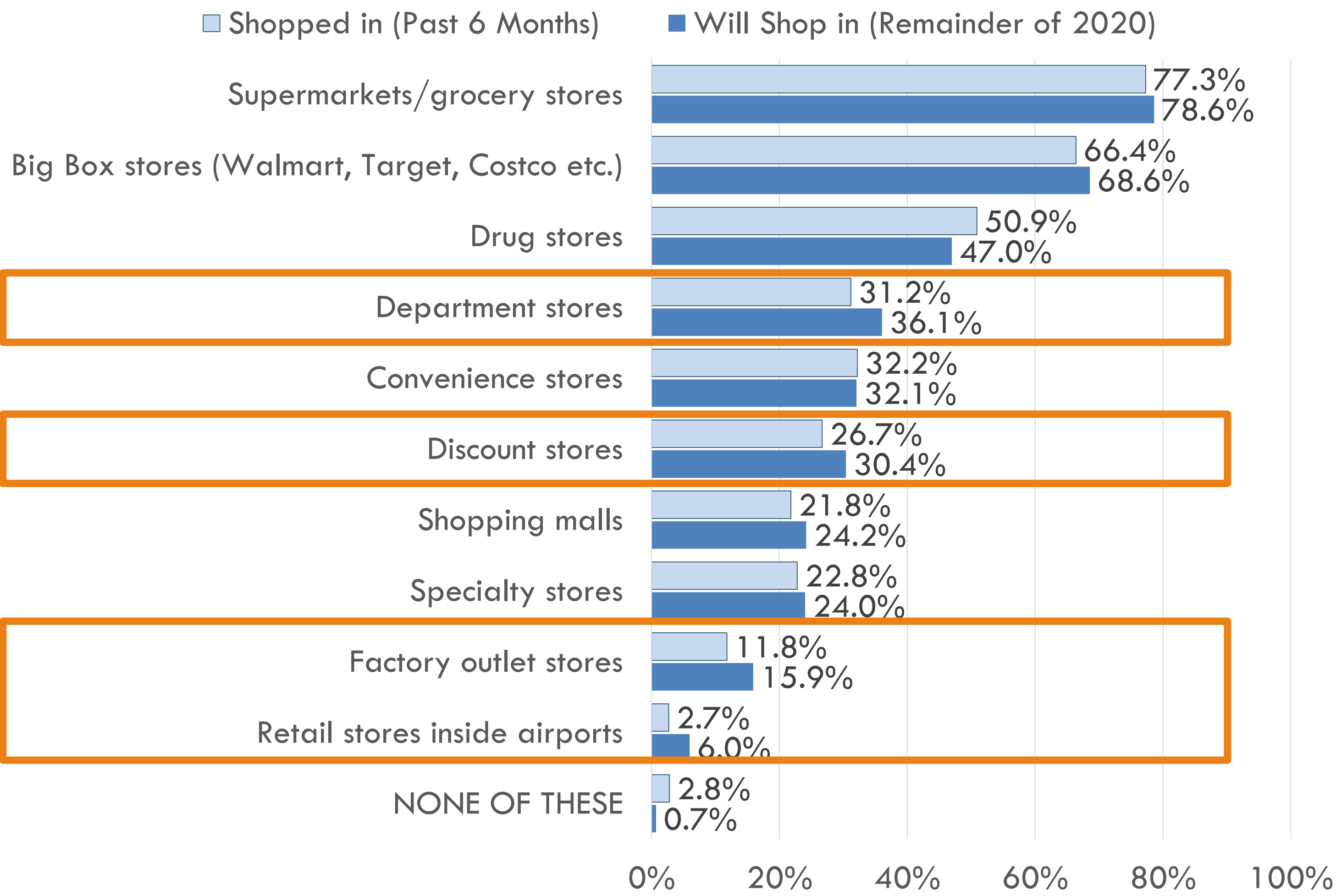
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



STORE TYPES USED LATER THIS YEAR

Question: In which types of stores are you likely to shop for any reason? (Select all that apply)

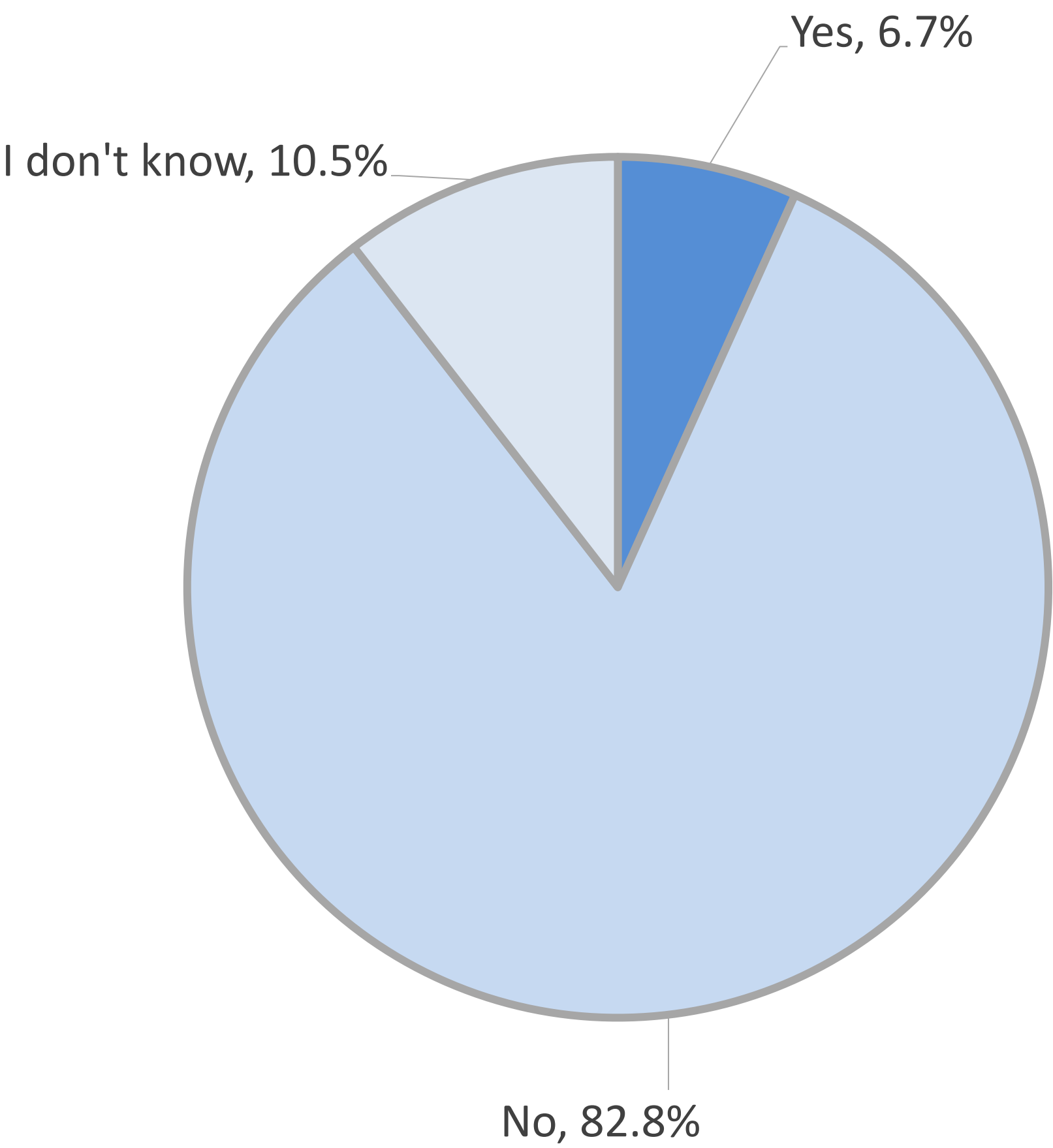
(Base: Wave 33 data. Respondents who will shop this year, 1,000 completed surveys.
Data collected Oct 23-25, 2020)



TRAVEL & HOLIDAY SHOPPING

Question: This year, do you plan to travel to any specific destinations more than 50 miles away from home to shop for the holidays?

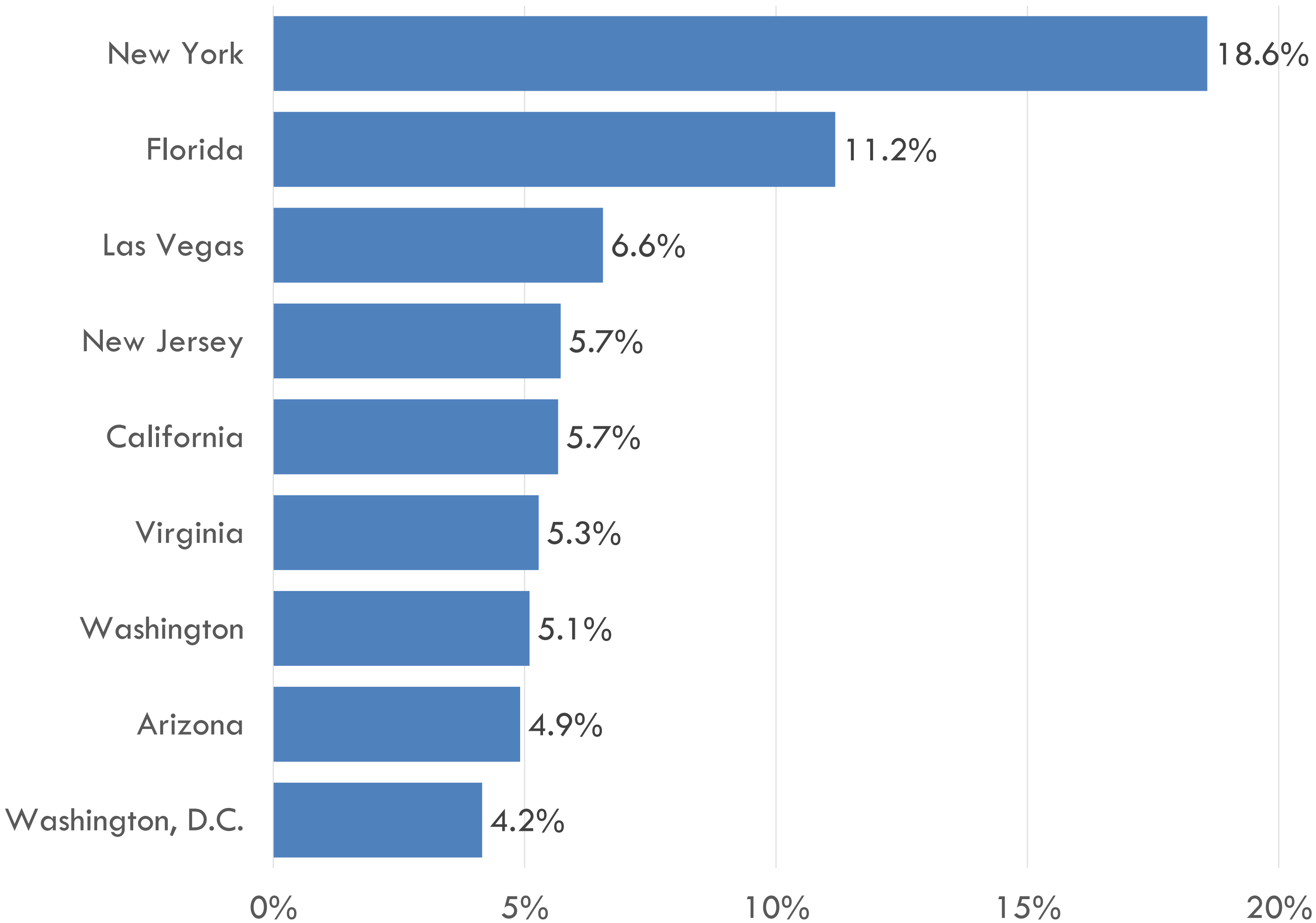
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



TOP HOLIDAY SHOPPING DESTINATIONS (UNAIDED)

Question: Which specific destinations will you visit to go holiday shopping? (Write in as many as three)

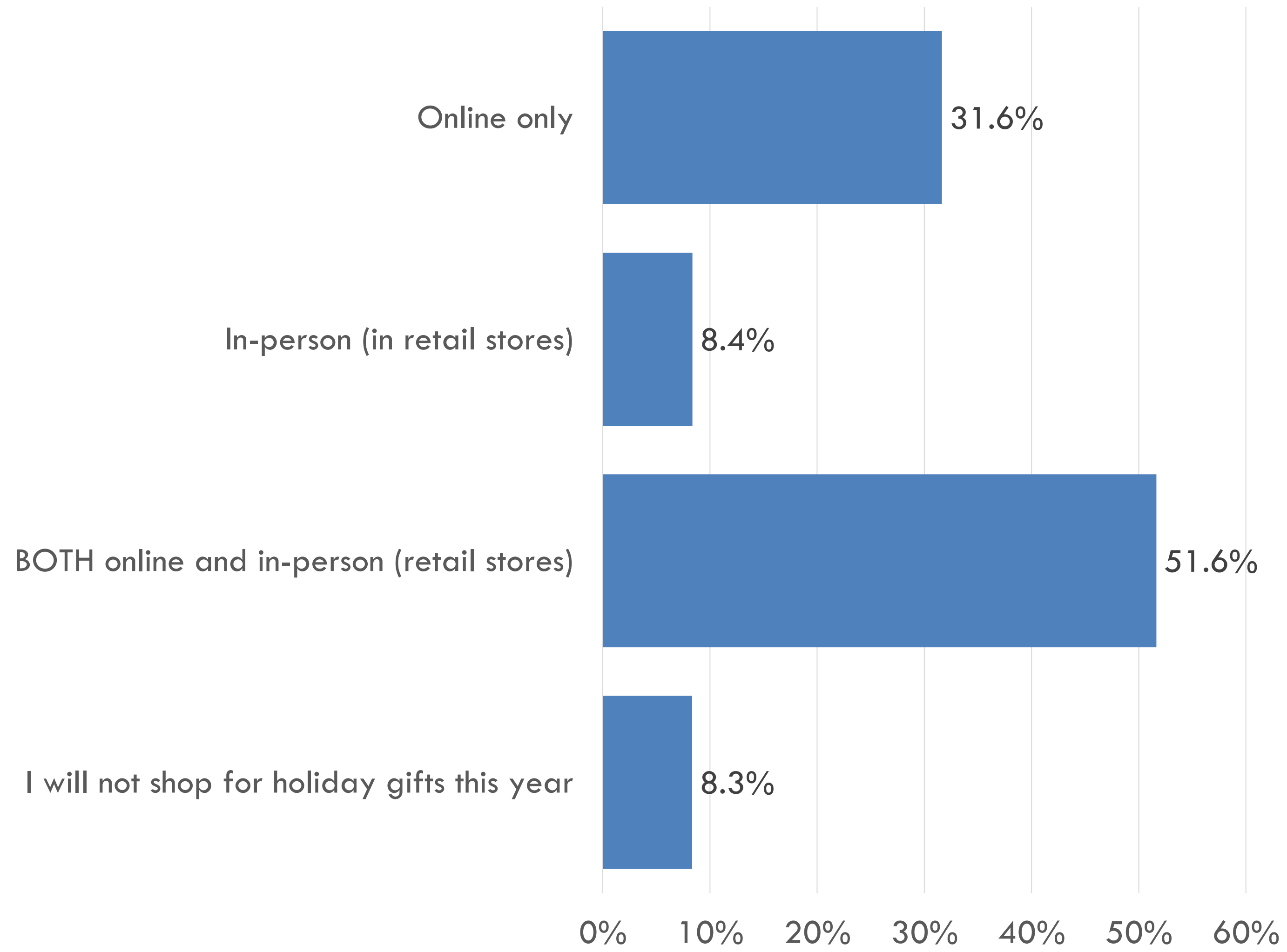
(Base: Wave 33 data. Respondents traveling for holiday shopping, 59 completed surveys. Data collected Oct 23-25, 2020)



HOW TRAVELERS WILL SHOP FOR HOLIDAY GIFTS

Question: How will you shop for holiday gifts this year? (Select ONE)

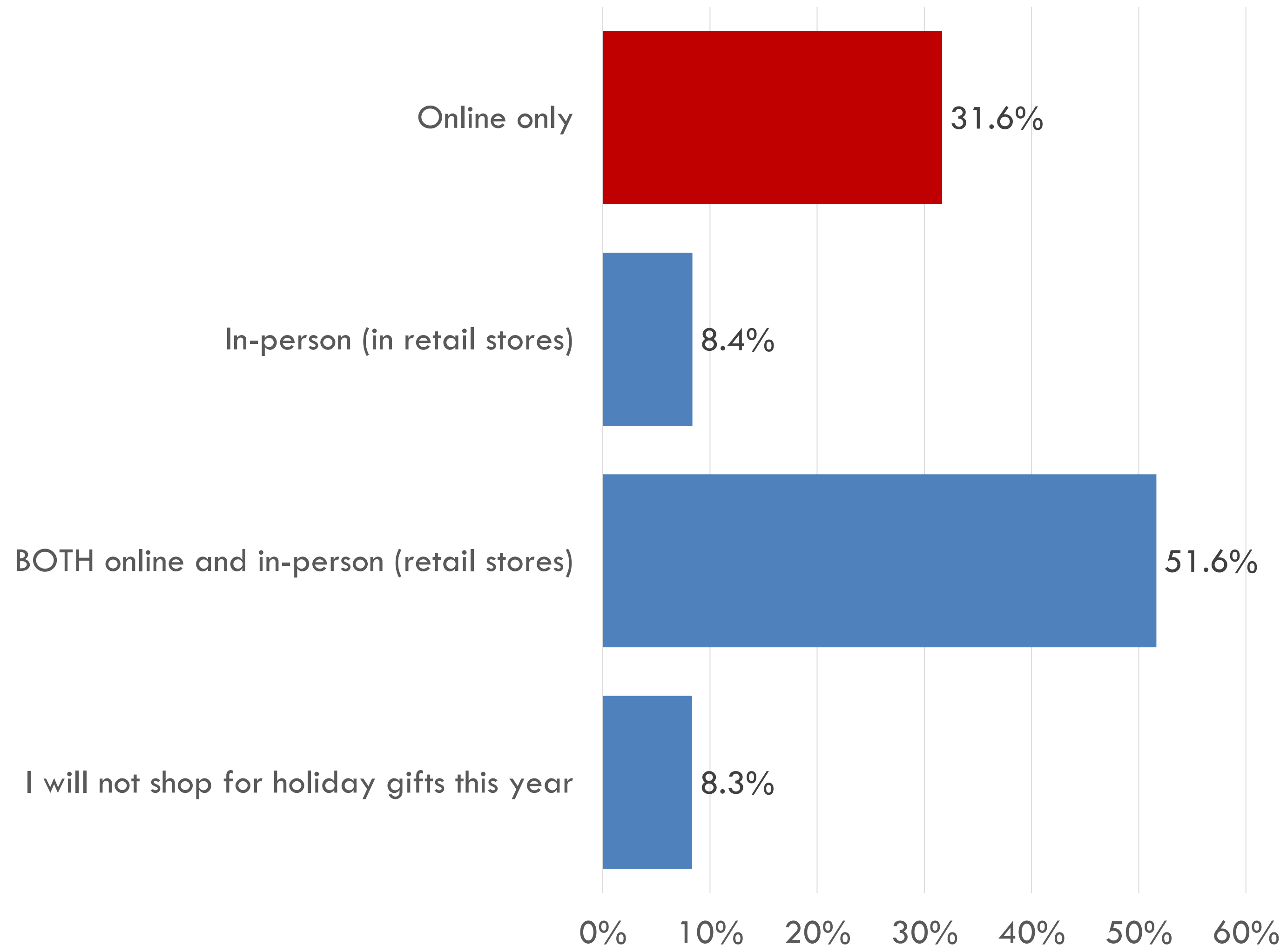
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



HOW TRAVELERS WILL SHOP FOR HOLIDAY GIFTS

Question: How will you shop for holiday gifts this year? (Select ONE)

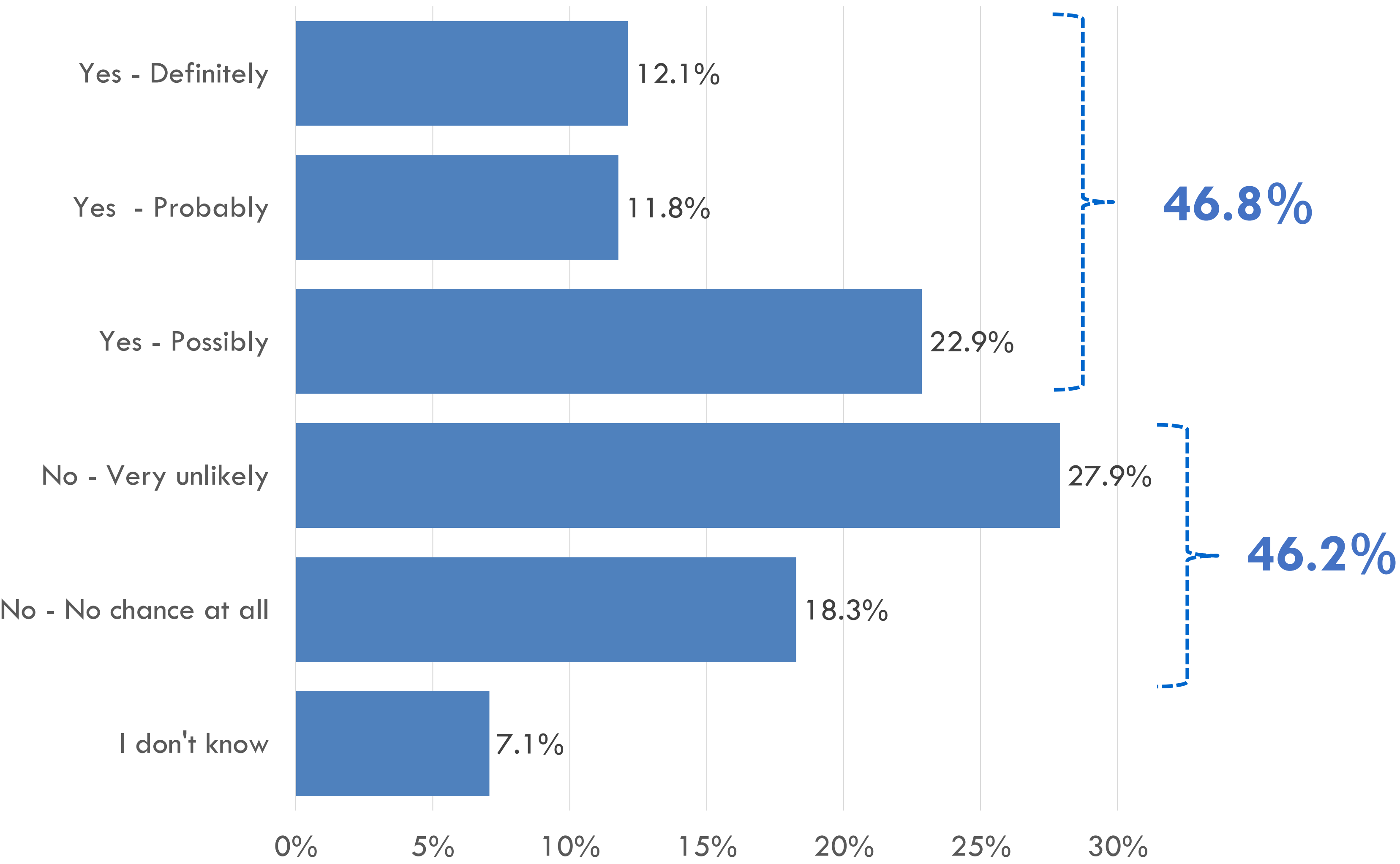
(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)



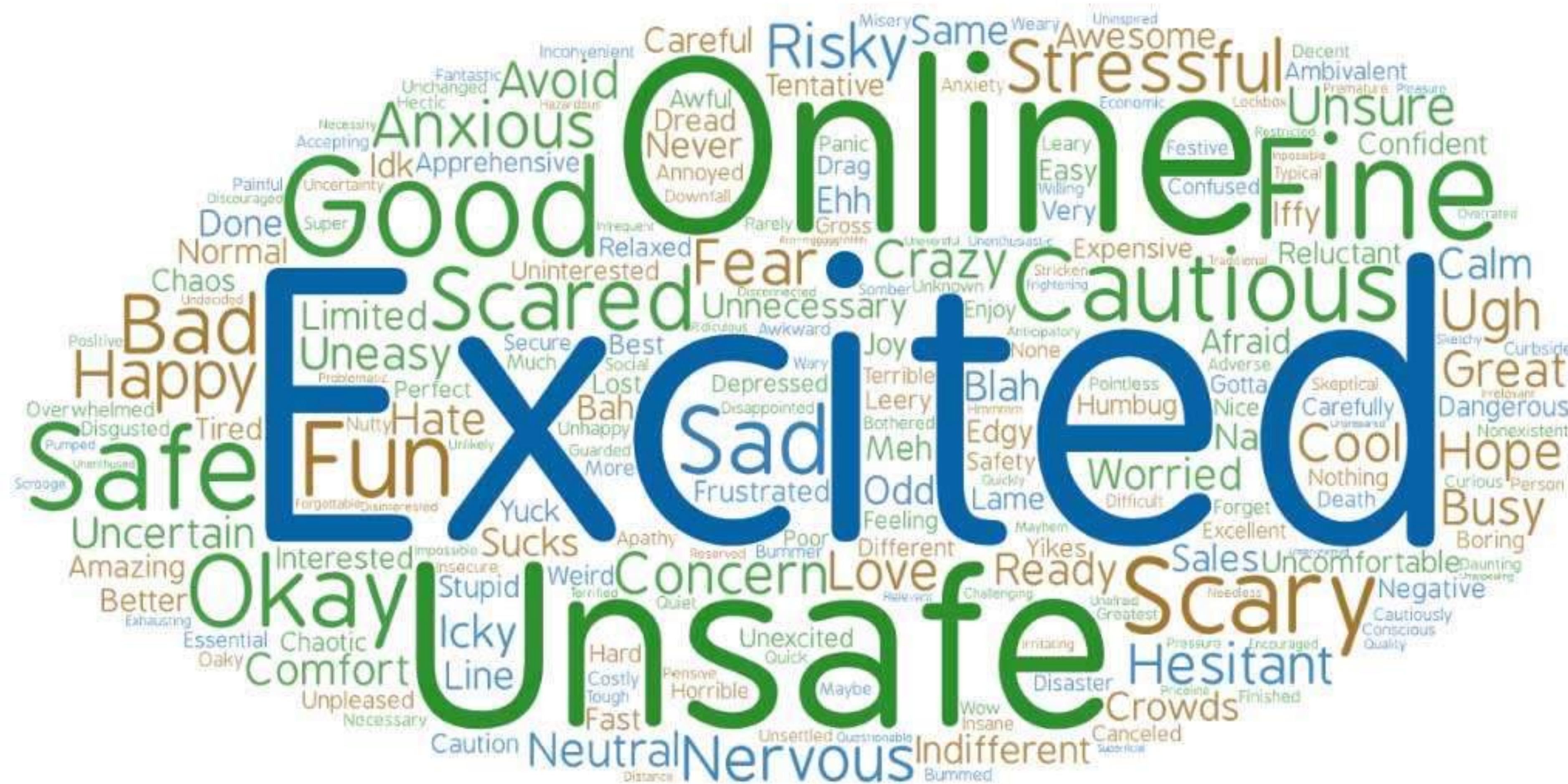
CAN ONLINE-ONLY SHOPPERS BE CONVINCED TO SHOP IN-PERSON?

Question: Could retail stores attract you to do your holiday shopping in-person by improving COVID-19 safety protocols? (Select one)

(Base: Wave 33 data. Online only holiday shoppers, 371 completed surveys. Data collected Oct 23-25, 2020)



What ONE WORD best describes your feelings about holiday shopping in a retail store now?





KEY TAKEAWAYS

1. Shopping is seen as one of the safer travel activities and smaller more intimate shopping experiences are rated as somewhat safer than big box stores and supermarkets.
2. The health and safety protocols Americans most desire for the in-person retail experience include social distancing guidelines enforced and strict masking requirements, although required masking for patrons and staff is seen as absolutely required by those Americans who still perceive shopping as unsafe.
3. Few expect to take holiday shopping trips (6.7%) this year About 1-in-3 travelers will exclusively use the Internet for this year's holiday shopping.
4. There appears to be some potential for converting this online activity to in-person shopping with good safety protocols.