H2R MARKET RESEARCH

COVID-19

TRAVEL & ATTRACTIONS

UPDATE:

REBUILD EDITION

Survey Results

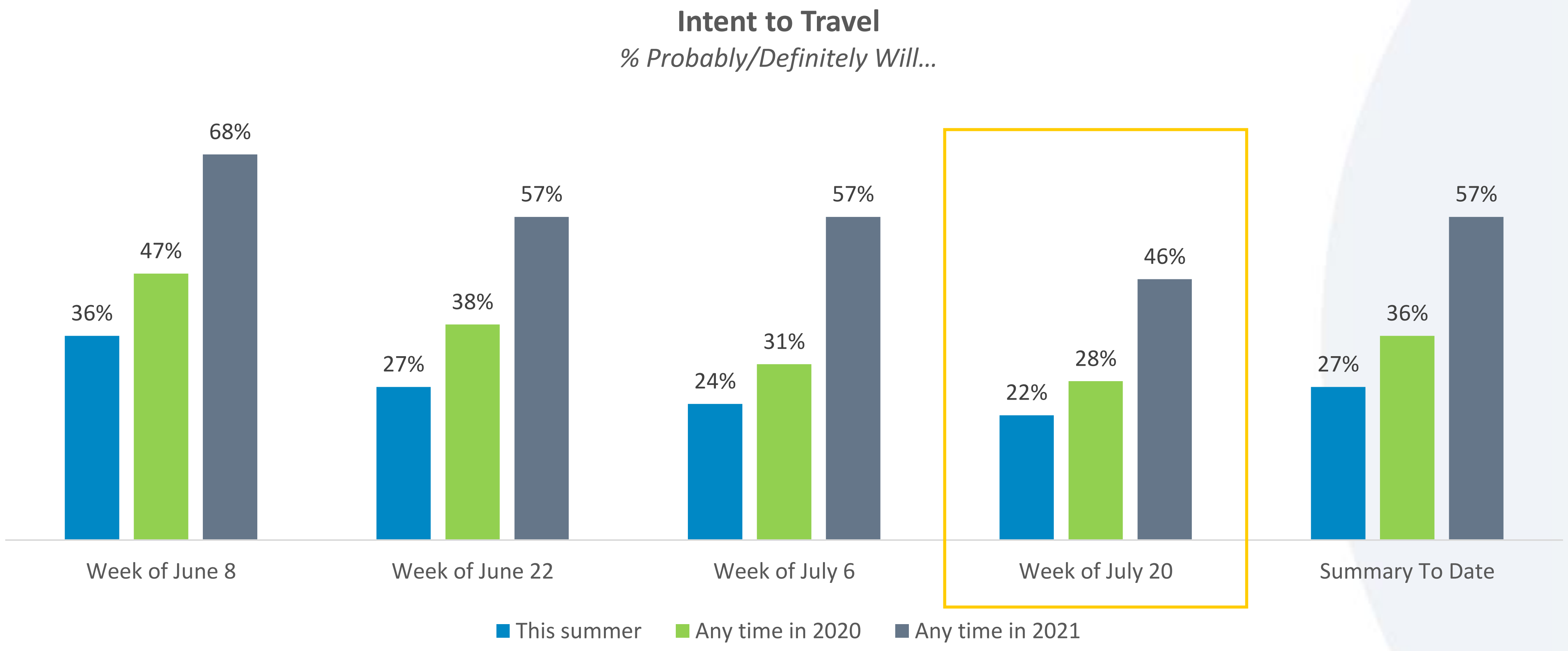
Wave 4 - Week of July 20

The purpose in conducting this research is to measure consumer sentiment regarding travel & tourism amid the COVID-19 pandemic.

This data reflects the fourth wave of H2R's COVID-19 Travel & Attractions Update: Rebuild Edition conducted the week of July 20, from a nationwide, professionally managed panel of consumers. 300 responses were collected for this wave, providing for a maximum margin of error of +/-5.7% at a 95% confidence interval.

To date, a total of 1,200 consumers have been interviewed. This sample size provides for a maximum margin of error of +/-2.8% at a 95% confidence interval.

Intent to travel has dipped to the lowest recorded levels in this final wave of *H2R's COVID-19 Update: Rebuild Edition*. Consumer intent to travel this summer, anytime in 2020 and in 2021 is down for the third straight wave.



Using the scale provided, please indicate your intent to travel…

RESPONDENT BASE: 300n per Wave | 1,200n Summary to Date

Interested in the full set of results? Visit https://www.h2rmarketresearch.com/covid19-rebuild or email info@h2rmarketresearch.com

Unfortunately, optimism appears to be in short supply. Only 26% feel that we may be “over the hump” while a majority believe the U.S. is still in the early stages or approaching the halfway mark of the pandemic and expect it to linger throughout 2021 and even into 2022.

Near the Very Beginning

I expect the pandemic to continue through the summer of 2022, if not longer.

12%

Still in the Early Stages

I expect the pandemic to linger throughout 2021 and into the spring of 2022.

24%

Approaching Halfway

I expect the pandemic to continue to be problematic through the fall of 2021.

26%

Just Past the Mid-Point

I expect it to come to an end around this time next summer (2021).

12%

Over the Hump, but Still Have a Ways To Go

I expect the pandemic to be trailing of by the spring of 2021.

10%

The Worst is Probably Behind Us

I expect the pandemic to end sometime around the end of 2020.

9%

It is Already Almost Over

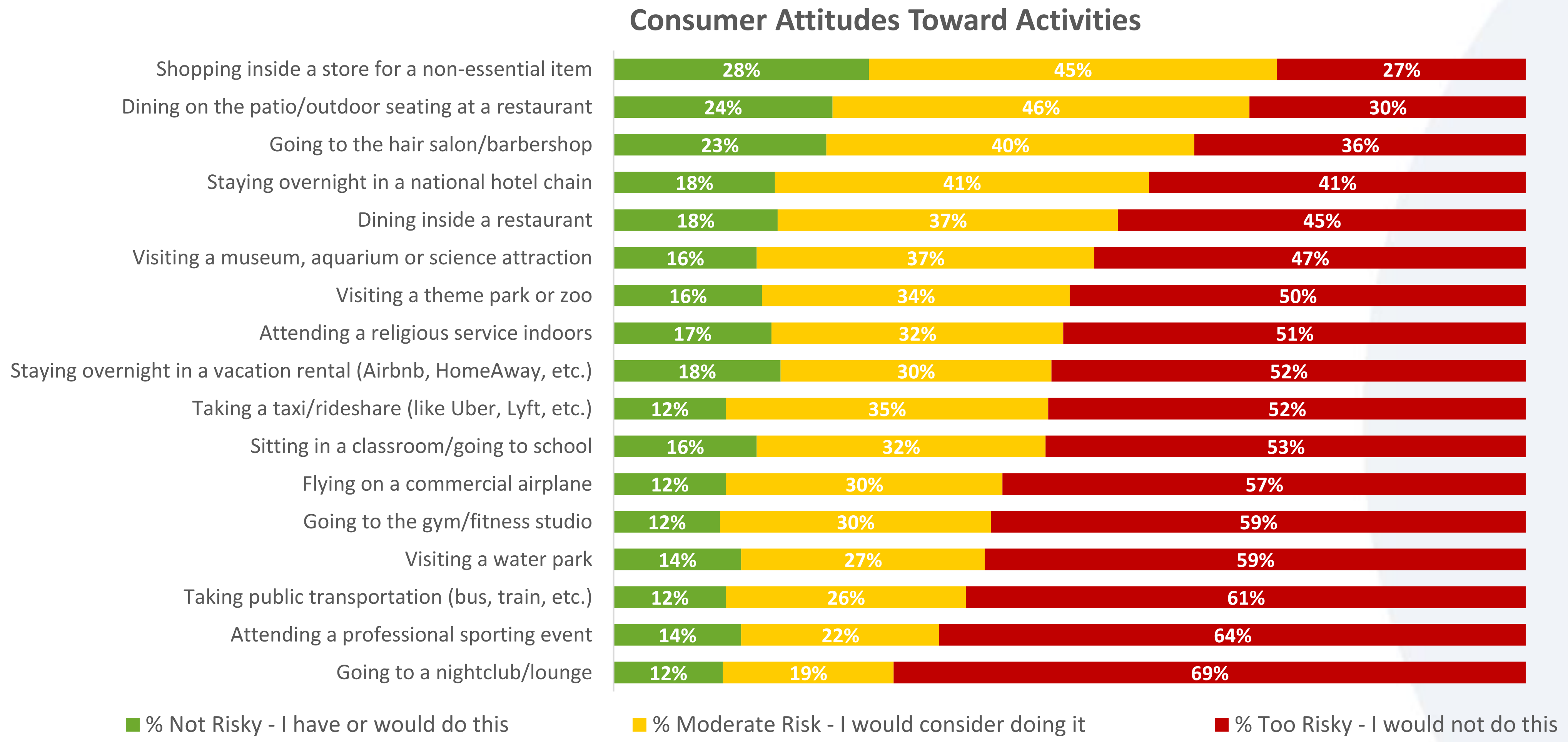
I expect the pandemic to end just as soon as the current surge is brought under control.

7%

Which of the following best describes where you believe the U.S. is right now in the course of the COVID-19 pandemic?

RESPONDENT BASE: 300n Wave 4

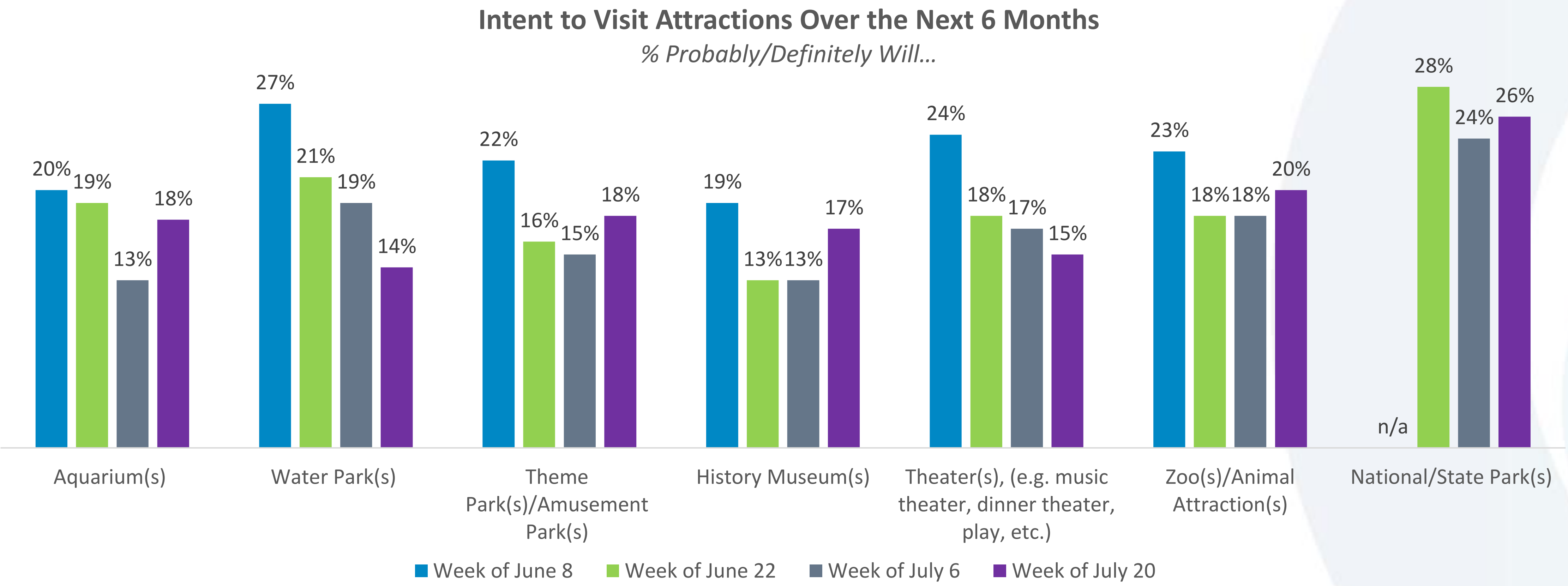
The majority of consumers consider travel related activities, which were once innocuous, to still be too risky to take part in. More than half would not fly on a commercial airplane or stay overnight in a vacation rental.



Please rate how risky you consider each of the following as it relates to the threat of COVID-19.

RESPONDENT BASE: 300n Wave 4

Likewise, intent to visit attractions in the next 6 months remains low compared to industry benchmarks. Visiting national/state parks remains the most popular option, but consumers indicated slightly higher intent to visit aquariums, theme parks, history museums and zoos this wave.



Using the scale provided, please indicate your intent to visit the following types of attractions in the next 6 months.

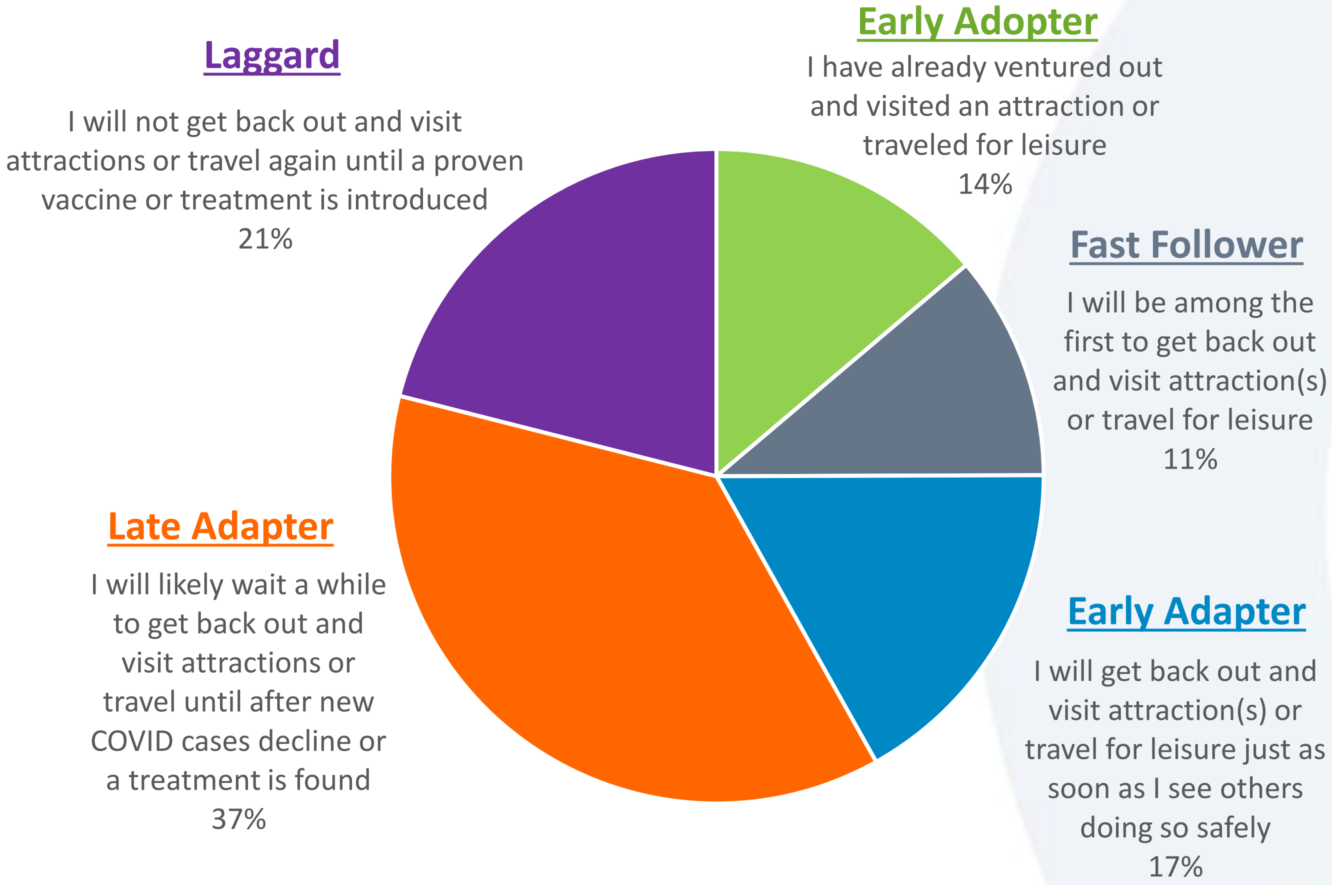
RESPONDENT BASE: 300n per Wave | 1,200n Summary to Date

Traveler Category – Summary to Date

Throughout the course of the summer, *Rebuild* data has continued to expose a clear divide between consumers who are willing to venture out versus those who may not be ready to travel for quite some time.

The numbers between traveler category have not shifted much since early June—meaning there continues to be a relatively narrow target for Early Adopters.

Interested in perceptions and demographics by Traveler Category?
Learn More Here

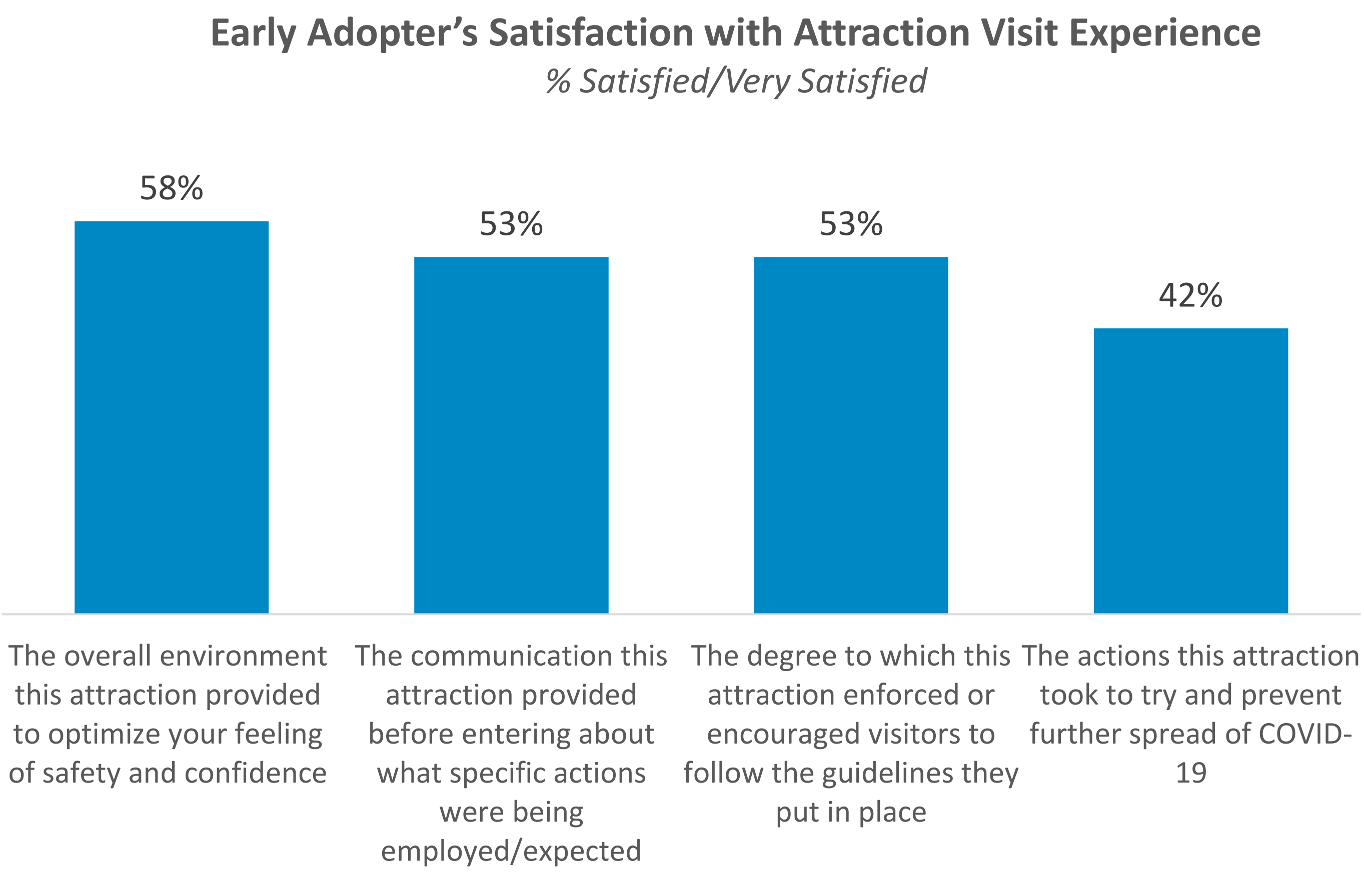


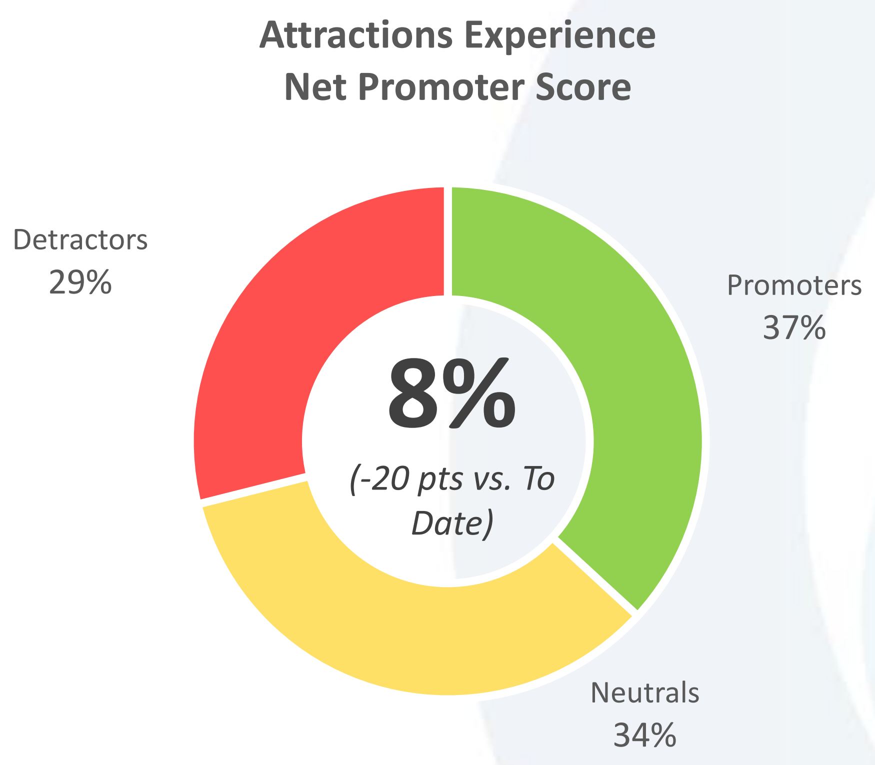
Which of the following phrases best describes your outlook on traveling for leisure/visiting attractions again once lockdowns have been lifted?

RESPONDENT BASE: 1,200n Summary To Date

Interested in the full set of results? Visit https://www.h2rmarketresearch.com/covid19-rebuild or email info@h2rmarketresearch.com

While out and about, the Early Adopters' are reporting much lower satisfaction with their experience than they did earlier this summer—particularly when it comes to their feelings of safety.



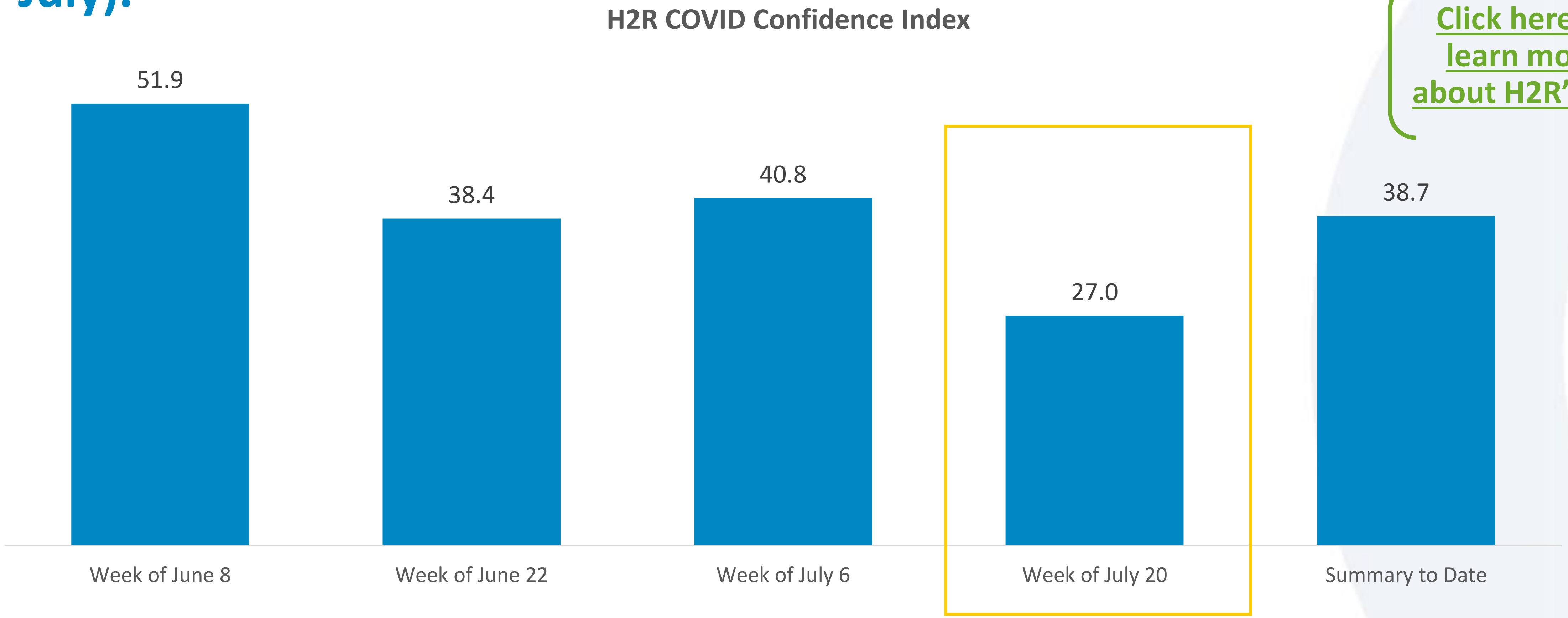


Using the scale provided, please indicate how satisfied or dissatisfied you were with the experience across each of the following. Considering the overarching experience, how likely would you be to recommend this attraction or experience to your friends or family members who have not yet ventured out again since the pandemic began?

RESPONDENT BASE: 46n Already Ventured Out Wave 4

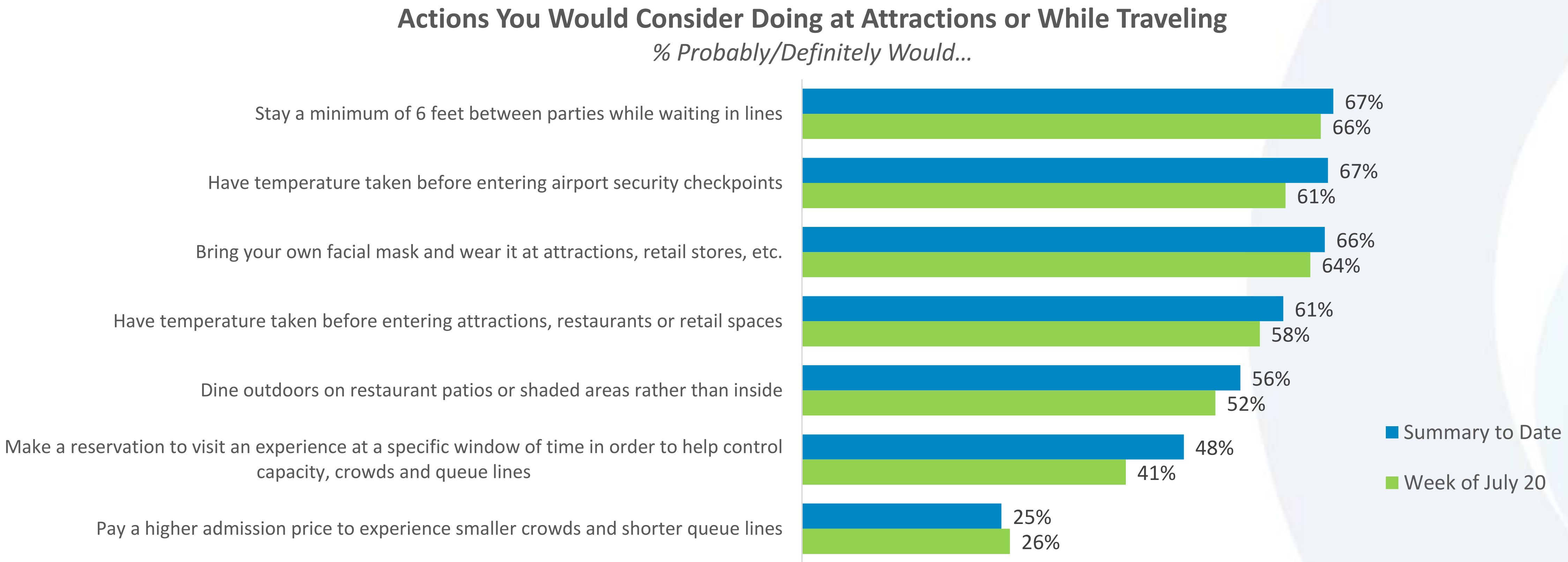
With Early Adopters' confidence in their travel/attractions experience levels plummeting this wave, the COVID Confidence Index has dropped to the lowest levels recorded in this research at 27.0 (-13.8 points vs. early July).

[Click here to learn more about H2R's CCI]



RESPONDENT BASE: 170n Already Ventured Out
Summary To Date

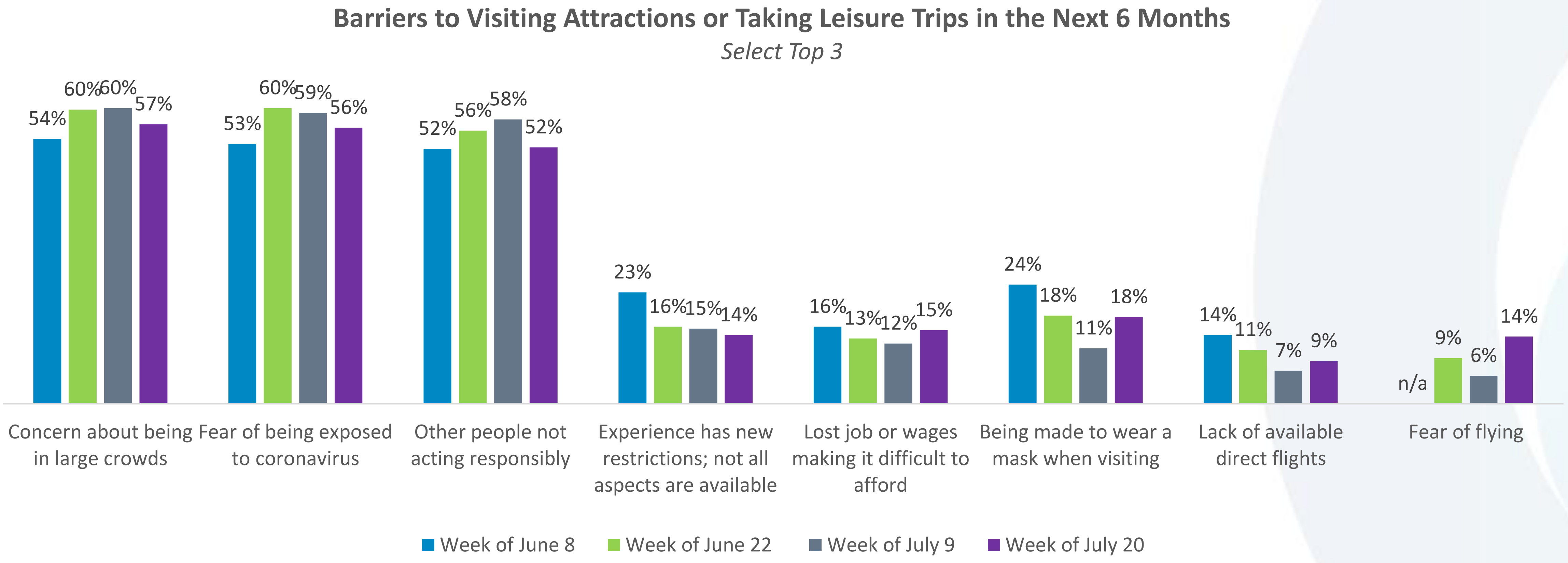
If traveling in the coming months, consumers are willing to self-regulate and take precautions of their own. They plan to practice social distancing, will wear a mask and are okay with having their temperature taken before flying or visiting attractions, restaurants and retailers.



In order to provide an optimal experience, please review each of the following actions and indicate the degree to which you would consider doing these things at attractions or while traveling…

RESPONDENT BASE: 300n Wave 4 | 1,200n Summary to Date

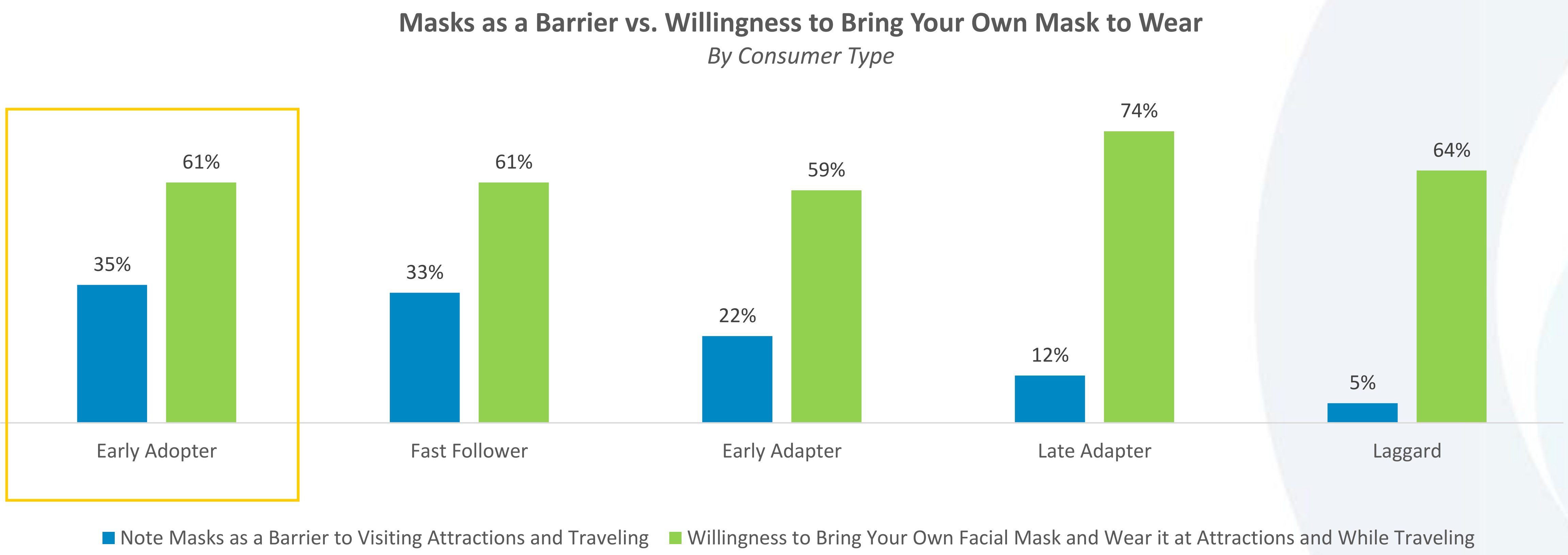
In this wave, more consumers indicate a fear of flying is holding them back from traveling. And while mask concerns are higher than in early July, issues about masks represent a slightly smaller barrier than recorded at the beginning of the summer.



What, if anything, concerns you the most or might prevent you from visiting attractions or taking leisure trips over the next 6 months? Select top 3.

RESPONDENT BASE: 300n per Wave | 1,200n Summary to Date

And, it should be pointed out that while Early Adopters are far more likely to view mask requirements as a hurdle to visitation than those who will not likely travel anytime soon, 61% of them still say they would bring their own mask when visiting an attraction.



What, if anything, concerns you the most or might prevent you from visiting attractions or taking leisure trips over the next 6 months? Select top 3. In order to provide an optimal experience, please review each of the following actions and indicate the degree to which you would consider doing these things at attractions or while traveling…

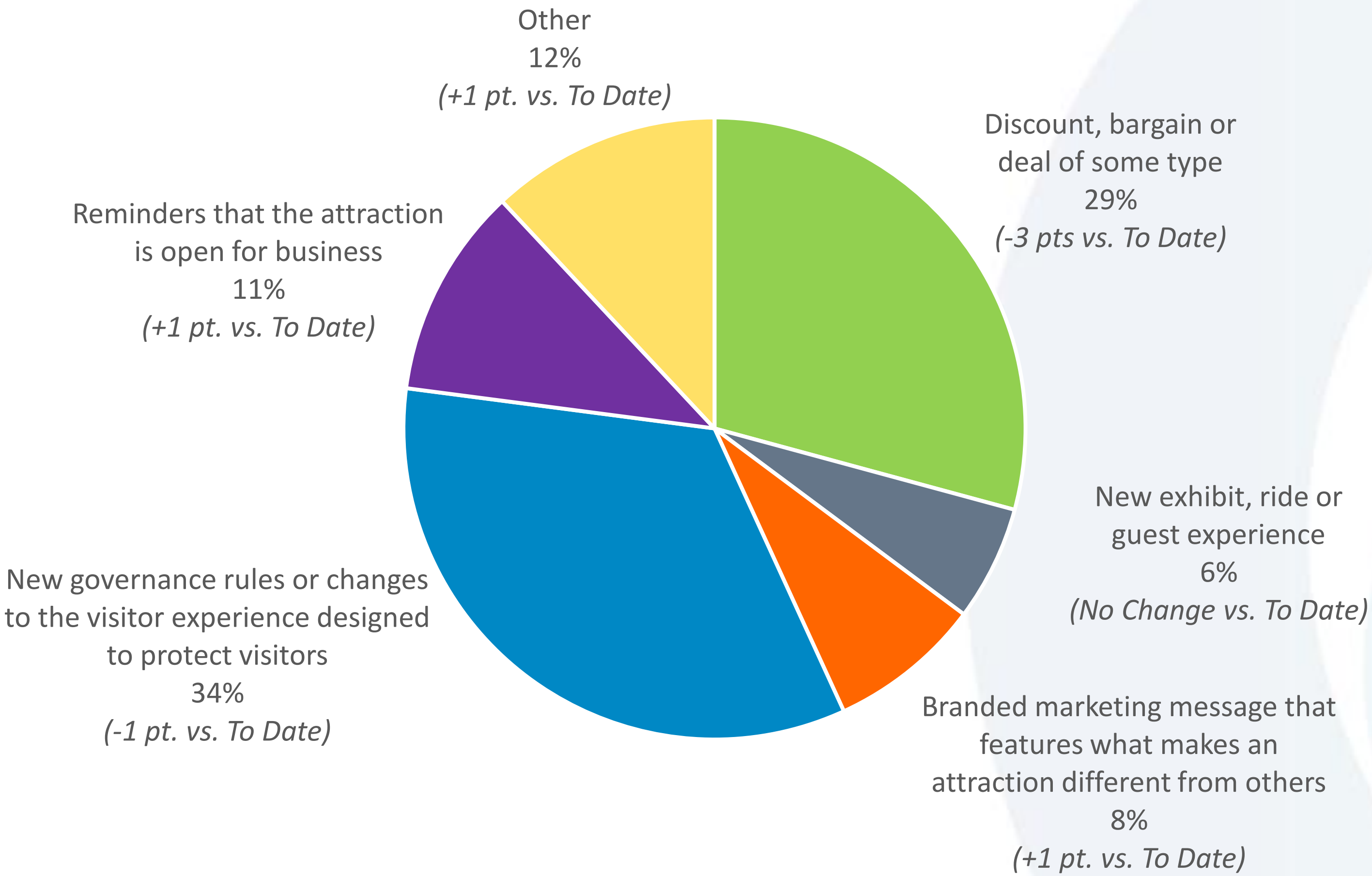
RESPONDENT BASE: 1,200n Summary to Date

Message Likely to Motivate Attractions Visit

In order to inspire travel, destinations and attractions must continue to be vigilant in marketing the experience changes that have been put in place to protect visitors.

The largest barriers preventing consumers from traveling continue to be exposure to the virus, fear of large crowds and others acting irresponsibly.

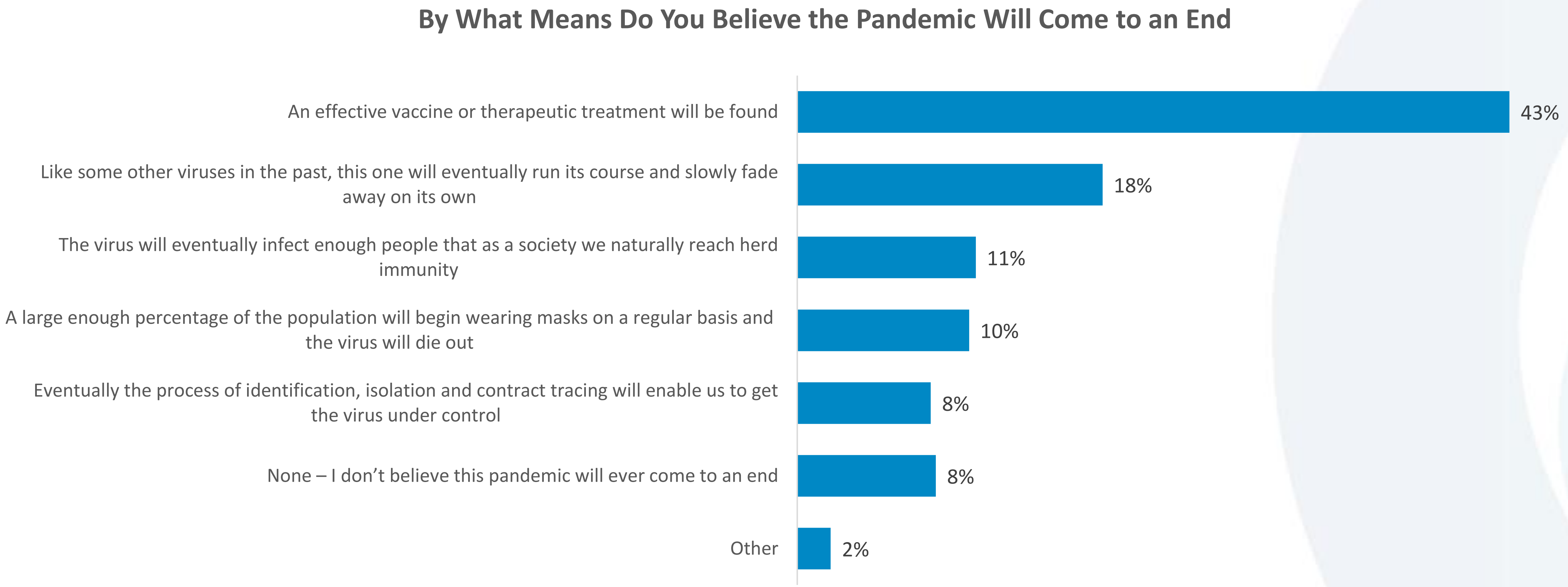
These worries mean it is mission critical to continue to convey how you plan to protect your guests in order to make them feel comfortable visiting your destination or attraction.



Which of the following marketing messages would be most likely to motivate or inspire you to visit an attraction(s) once you feel comfortable venturing out again?

RESPONDENT BASE: 300n Wave 4

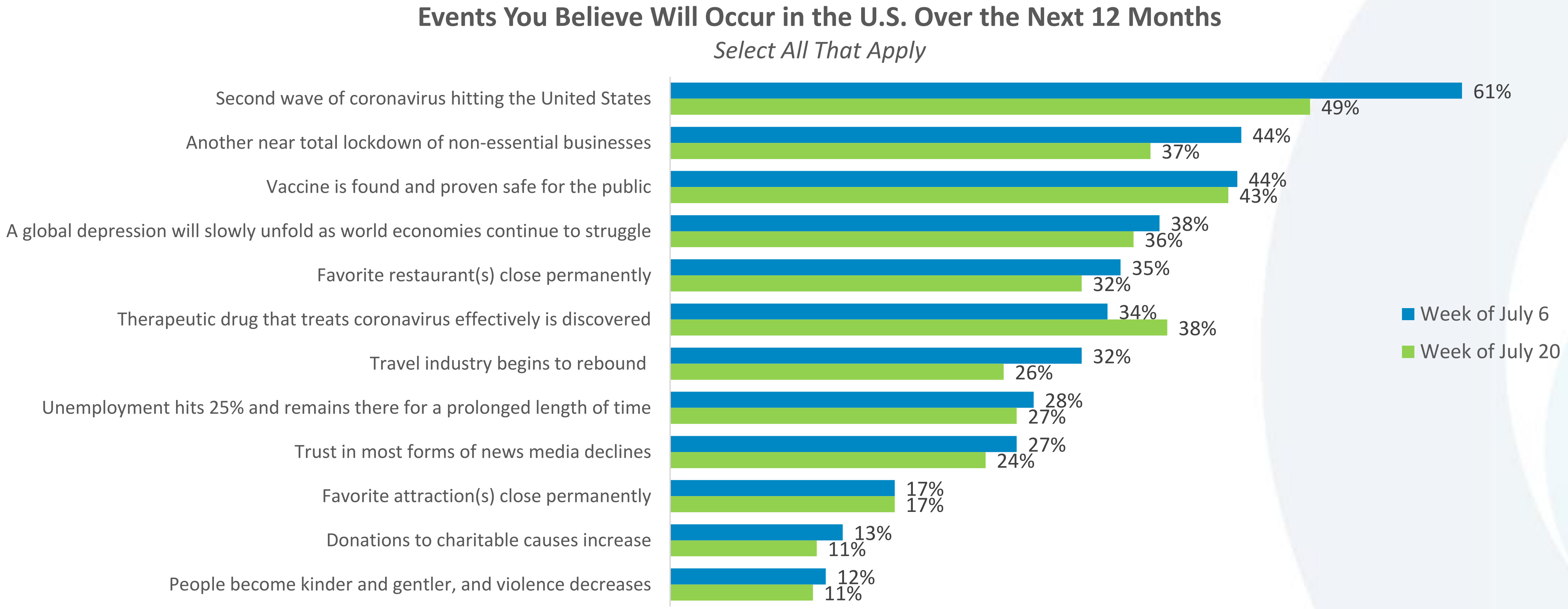
The biggest question on everyone’s mind is “when will this all be over?” According to consumers nationwide, most believe there will need to be an effective vaccine or treatment found before the pandemic will come to an end.



By what means do you believe the pandemic will eventually cone to an end, if at all?

RESPONDENT BASE: 300n Wave 4

Consumers are hopeful that a vaccine will be found effective but also believe that there could be a second wave of the virus to hit the United States in the next 12 months.



Which of the following events do you believe will occur in the United States over the next 12 months? Please select all that apply.

RESPONDENT BASE: 300n per Wave

THE **CALL** OF THE **CONSUMER**

H2R MARKET RESEARCH COVID-19 UPDATE

Tracking the **everchanging** attitudes of consumers across the nation from August into October.

Learn more about out partnership opportunities here:

h2rmarketresearch.com/calloftheconsumer