



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

*Presentation of Findings
December 1st, 2020*

Destination  Analysts

Independent Unbiased Research



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 38 data (fielded November 27th-29th) 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





United States COVID-19 Cases and Deaths by State

Reported to the CDC since January 21, 2020

TOTAL CASES

12,999,664

+176,572 New Cases

CASES IN LAST 7 DAYS PER 100K

50.5

TOTAL DEATHS

263,956

+1,283 New Deaths

CDC | Updated: Nov 28, 2020 12:16PM

View:

Cases

Deaths

Time period:

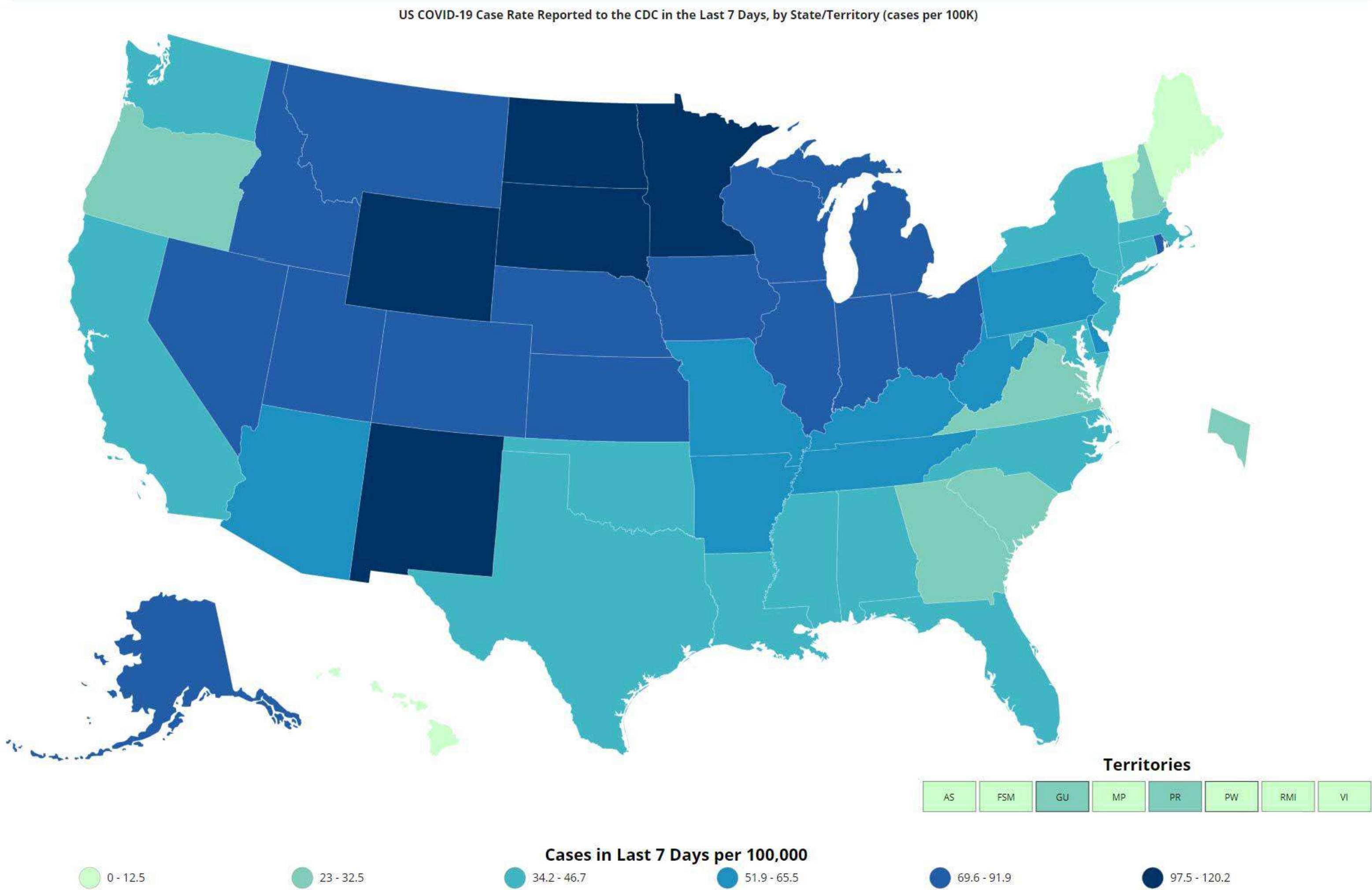
Last 7 Days

Since Jan 21, 2020

Metric:

Count

Rate per 100,000



UK regulator set to approve COVID-19 vaccine next week - FT



FILE PHOTO: Vials with a sticker reading, "COVID-19 / Coronavirus vaccine / Injection only" and a medical syringe are seen in front of a displayed Pfizer logo in this illustration taken October 31, 2020. REUTERS/Dado Ruvic/File Photo

(Reuters) - Britain is set to approve the COVID-19 vaccine developed by BioNTech SE and Pfizer Inc next week and deliveries would begin within hours of the authorisation, the Financial Times reported on Saturday.

The first immunisations using the BioNTech and Pfizer vaccine could take place from Dec. 7, the FT said, citing unnamed sources. on.ft.com/3o6JrSG

Earlier in the day, British Prime Minister Boris Johnson named Nadhim Zahawi, currently a junior business minister, as the minister responsible for the deployment of COVID-19 vaccines.

CDC to vote on who will receive COVID-19 vaccine 1st as Pfizer shot could be approved in weeks

The Food and Drug Administration is holding an "emergency-use authorization" meeting about Pfizer's vaccine on Dec. 10.

By Cornell W. Barnard
Friday, November 27, 2020 7:01PM



EMBED <> MORE VIDEOS ▶

With COVID-19 cases in the United States surpassing 13 million, the race is on to get a vaccine to the public quickly, perhaps as early as next month.

SAN FRANCISCO (KGO) -- With COVID-19 cases in the United States surpassing 13 million, the race is on to get a vaccine to the public quickly, perhaps as early as next month.

But there have been setbacks.

RELATED: FDA warns about companies marketing fraudulent products that claim to treat COVID-19

The FDA could be authorizing a coronavirus vaccine in a few weeks.

The Food and Drug Administration is holding an "emergency-use authorization" meeting about Pfizer's vaccine on Dec. 10.

The director of the FDA's Center for Biologics Evaluation and Research says a decision is expected within weeks, possibly days after that key meeting.

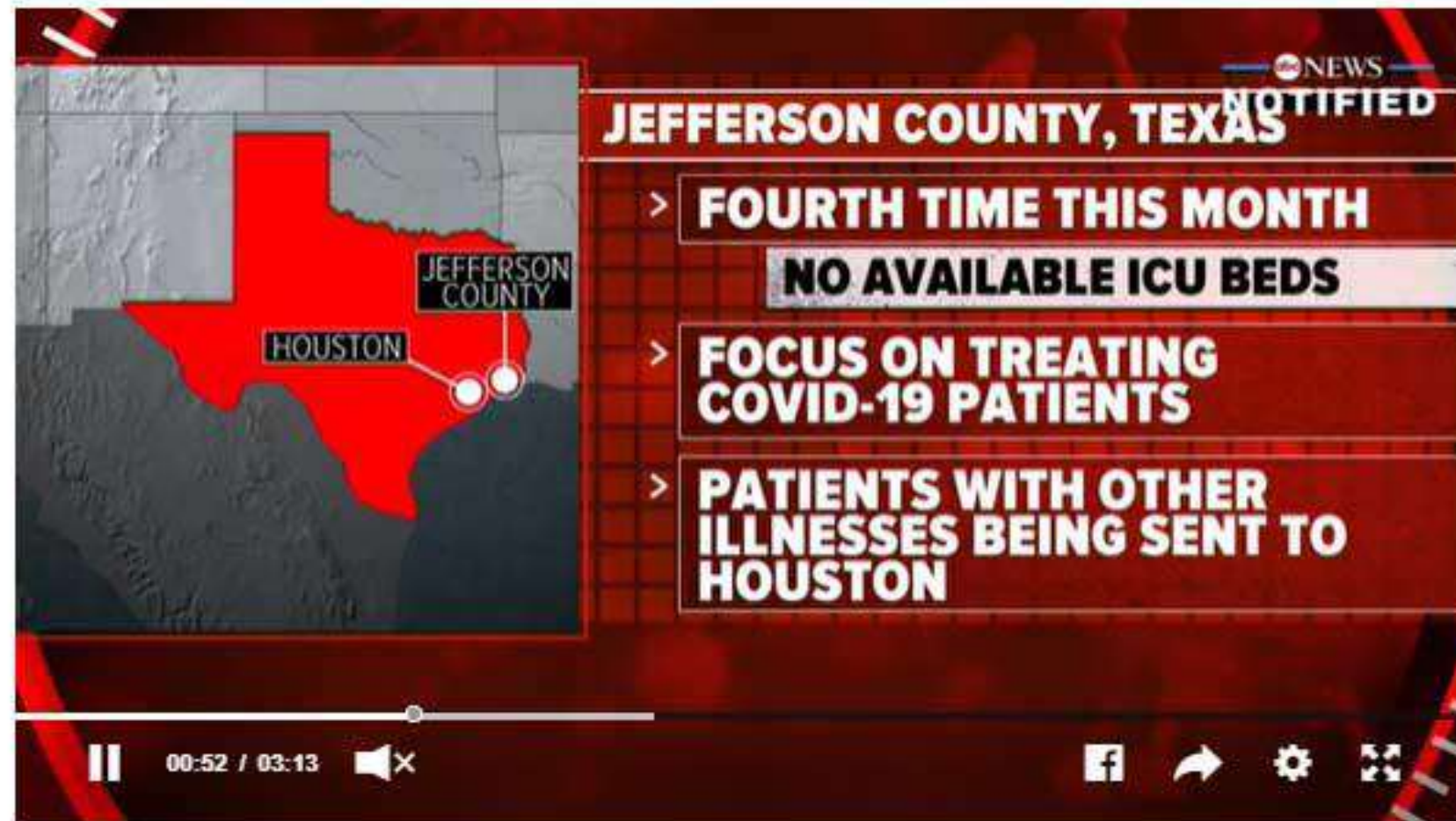
So far, Pfizer is the only company to apply for an emergency use authorization for a coronavirus vaccine.

Airlines preparing to transport COVID-19 vaccine when ready for distribution

American Airlines "successfully moved" thermal packaging in a trial flight.

By **Meredith Deliso**

November 28, 2020, 5:48 PM • 4 min read



By the Numbers: Race for the COVID-19 vaccine

Three drug-makers claim they have highly effective vaccine candidates.

There isn't an approved COVID-19 vaccine just yet, but preparations are already underway for its distribution -- including any extreme temperature requirements.

American Airlines announced this week that its cargo operation has started conducting trial flights from Miami to South America to test its process of shipping vaccines.

BUSINESS

United Begins Flying Pfizer's Covid-19 Vaccine

Carriers are positioning doses for quick distribution if vaccines are approved by regulators



The flights are one link in a vast global supply chain being assembled to tackle the logistical challenge of distributing Covid-19 vaccines.

PHOTO: TED S. WARREN/ASSOCIATED PRESS

By [Alison Sider](#) and [Peter Loftus](#)

Updated Nov. 27, 2020 5:46 pm ET

PRINT TEXT

United Airlines Holdings Inc. on Friday began operating charter flights to position doses of Pfizer Inc.'s Covid-19 vaccine for quick distribution if the shots are approved by regulators, according to people familiar with the matter.

Coronavirus vaccines a ‘light at the end of the tunnel,’ but restrictions will likely last months longer

Lisa Kashinsky · 2 hrs ago



The first doses of a coronavirus vaccine could be available in the next few weeks — making medical experts hopeful about a “light at the end of the tunnel” even as they caution it will likely be several months before enough people are vaccinated to start easing restrictions.



© Provided by Boston Herald FILE — In this July 27, 2020, file photo, nurse Kathe Olmstead prepares a shot that is part of a possible COVID-19 vaccine, developed by the National Institutes of Health and Moderna Inc., in Binghamton, N.Y. Moderna said Monday, Nov. 16, 2020, its COVID-19 shot provides strong protection against the coronavirus that's surging in the U.S. and around the world. (AP Photo/Hans Pennink, File)

“It’s an exciting time with two highly efficacious vaccines, and possibly three,” Boston University infectious diseases specialist Dr. Davidson Hamer said after vaccines from Pfizer and Moderna showed roughly 95% efficacy and one from AstraZeneca showed promise despite issues with its clinical trial.

“There’s some hope ahead,” Hamer said, “and light at the end of the tunnel.”

With the first vaccines potentially available by mid-December — the FDA is set to review [Pfizer’s emergency use authorization request](#) on Dec. 10, and the first doses could ship within 24 hours of approval — experts and officials from the federal government on down are working to finalize distribution plans.

Massachusetts will use its existing flu vaccine network to roll out COVID-19 vaccines, Gov. Charlie Baker said last week, though it “hasn’t been fully decided yet” who will get the shots first.

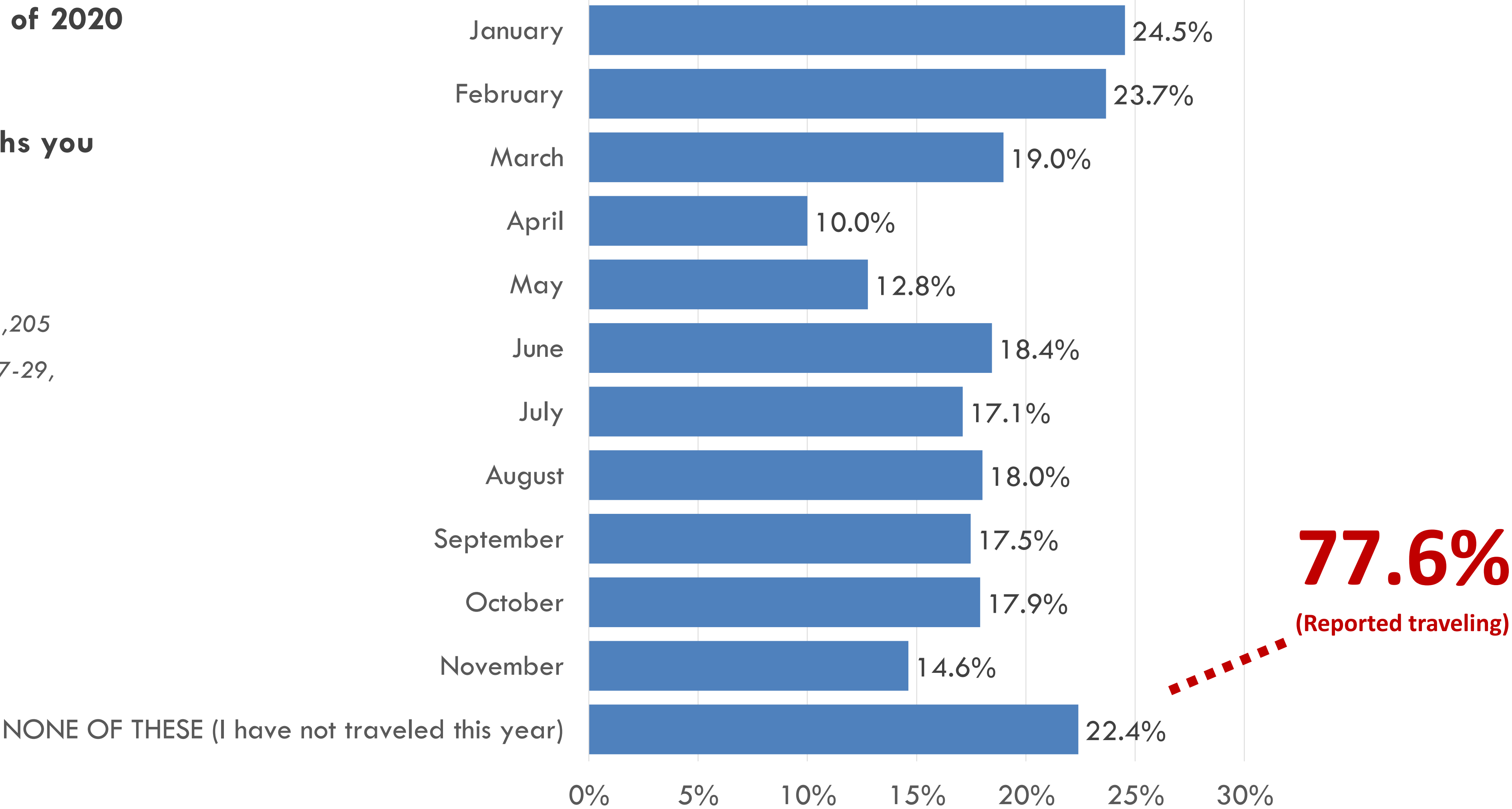
A family of four is walking on a modern, glass-enclosed walkway. The father, wearing a yellow sweater and a white face mask, holds the hand of a young girl in a striped dress and a backpack. The mother, wearing a blue and white striped shirt and a white face mask, holds the hand of another young girl in a light blue jumpsuit. Both girls are also wearing white face masks. The mother is pulling a teal suitcase, and the father is pulling a brown suitcase. The background shows a modern building with large glass windows and a glass railing. The text "TRAVEL DURING THE PANDEMIC" is overlaid on the right side of the image.

TRAVEL DURING THE PANDEMIC

MONTH OF TRAVEL (2020 ACTUAL)

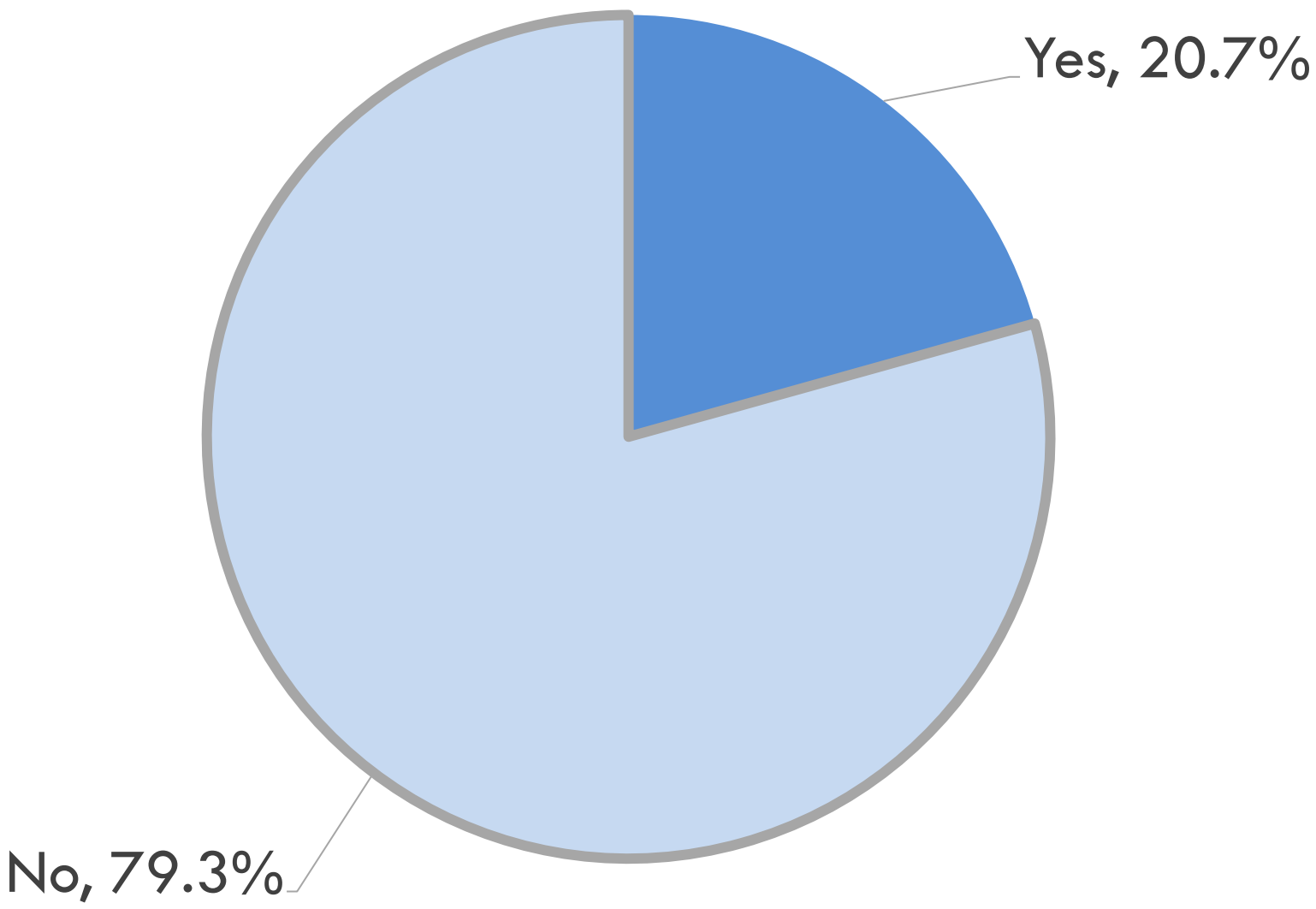
Question: In which month(s) of 2020 did you travel for any reason? (Select all the months you traveled)

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

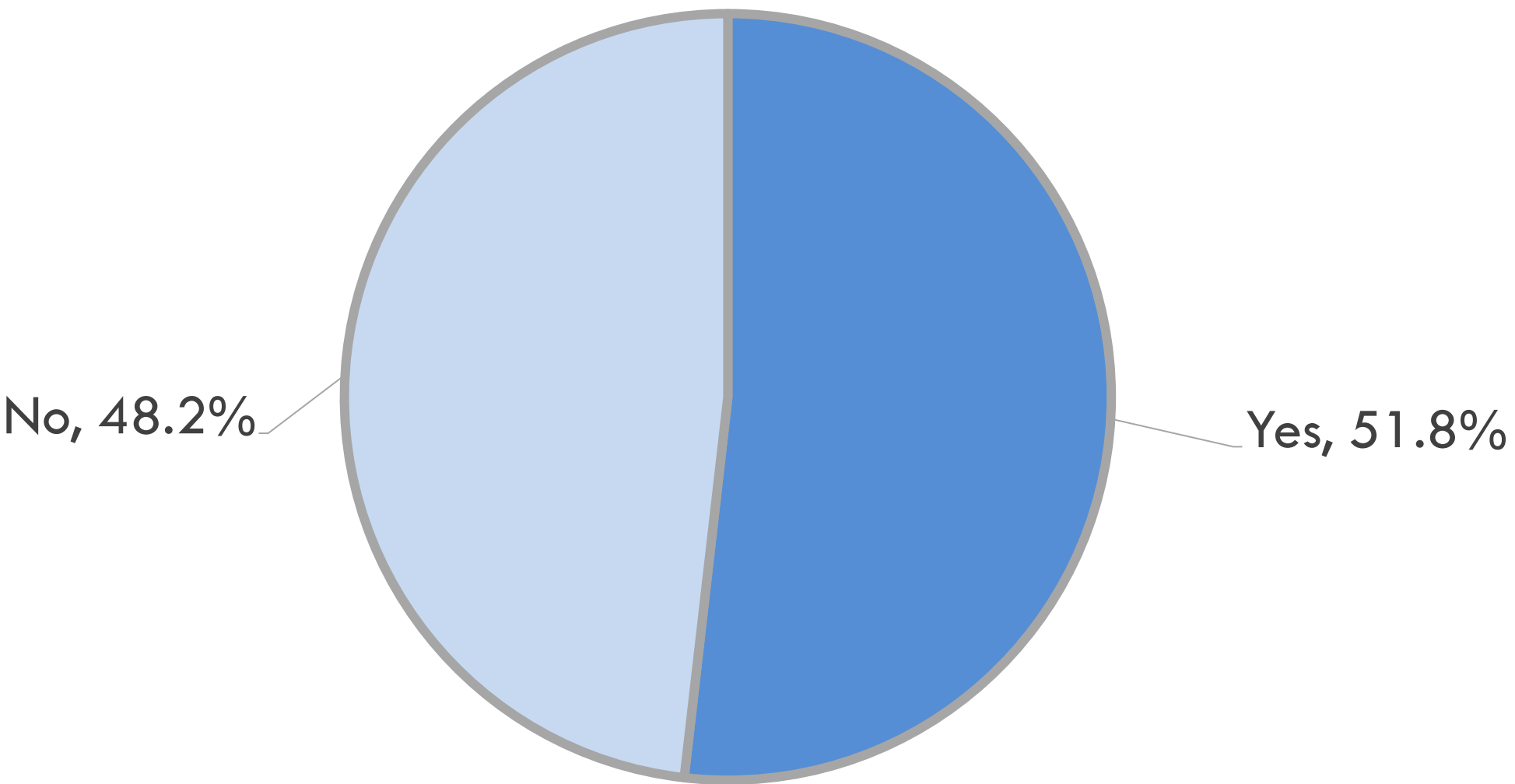


ROAD & AIR TRAVEL DURING THE PANDEMIC

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



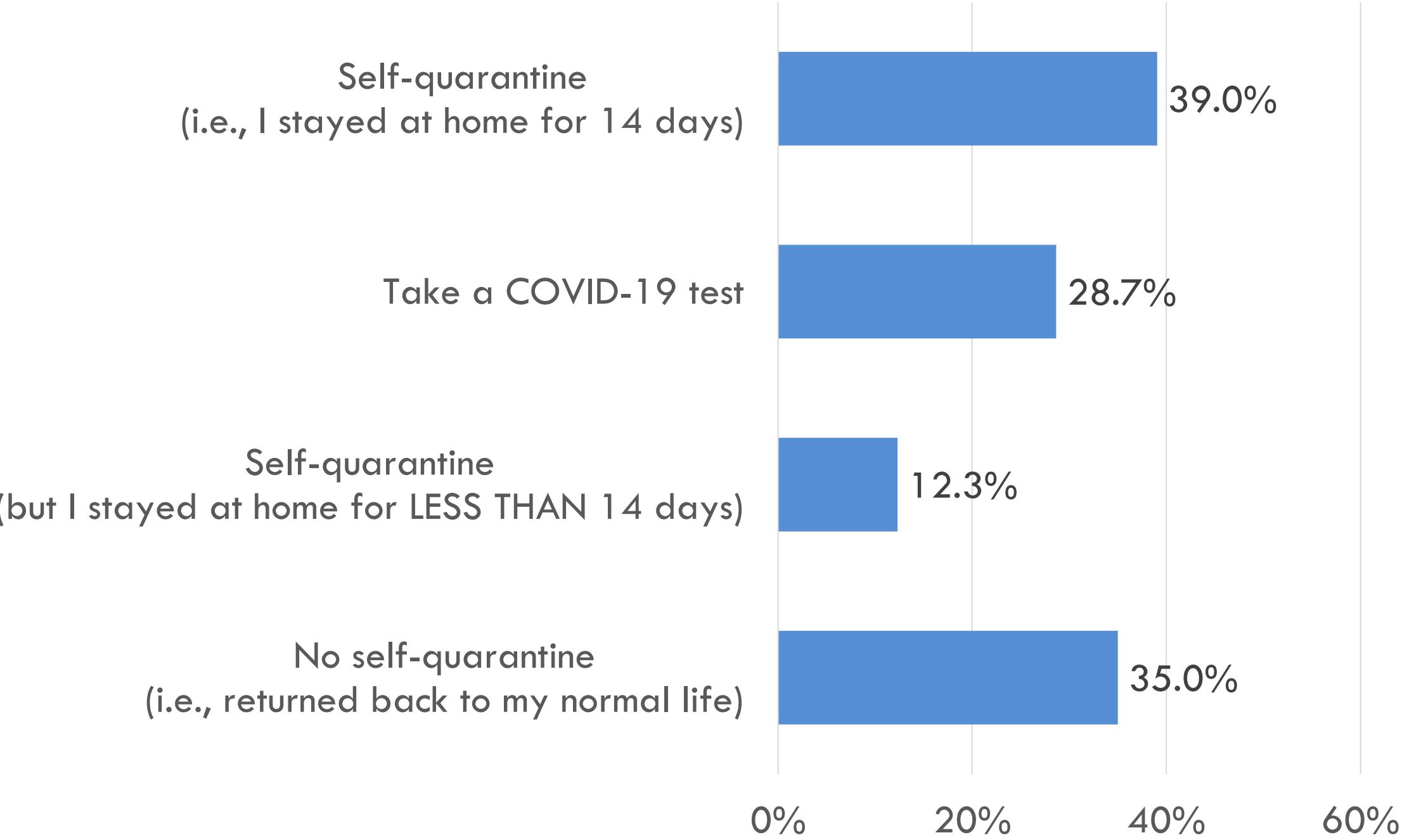
Question: Have you taken any road trips (50 miles or more from your home) since the start of the Coronavirus pandemic (March 2020 to today)?



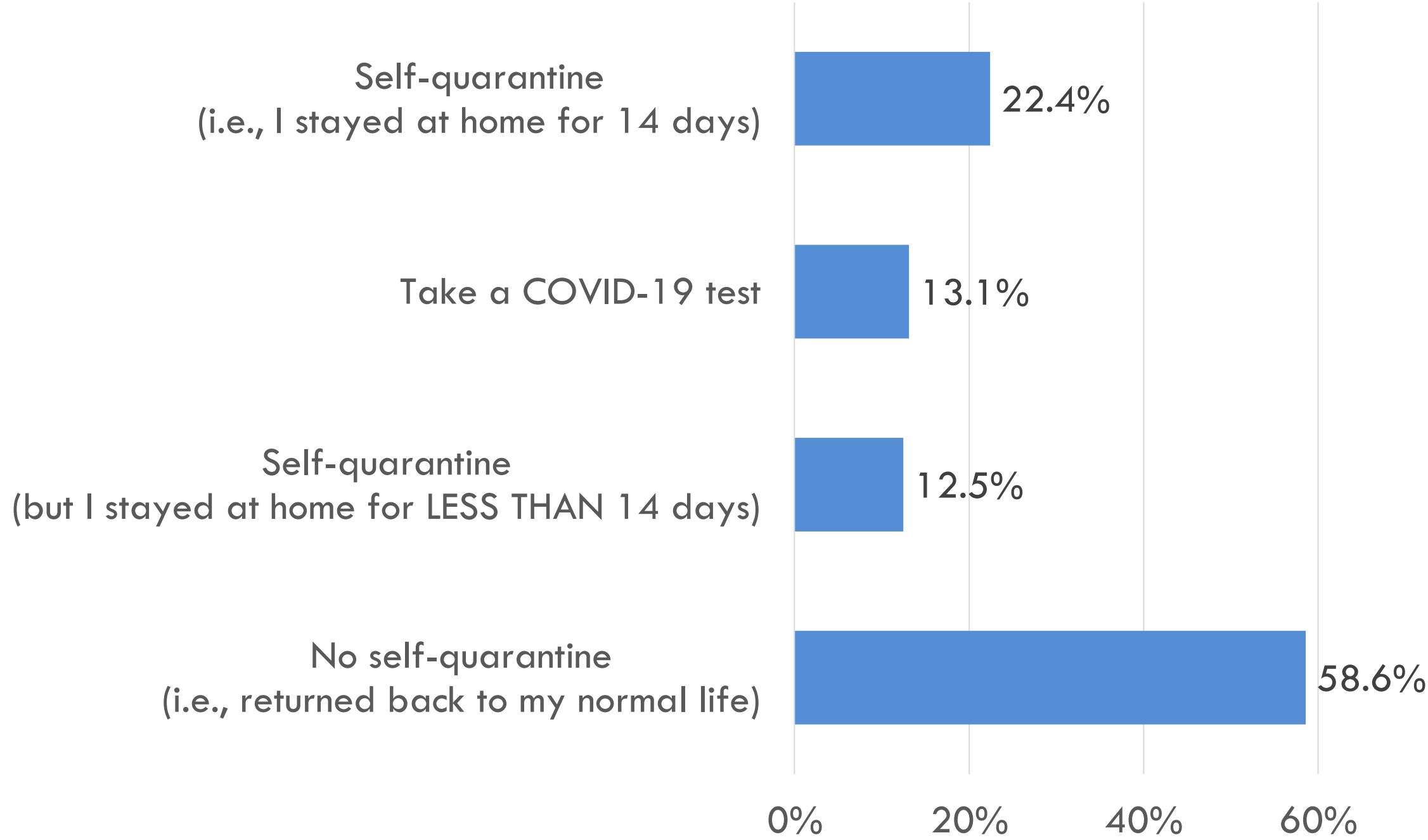
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

SAFETY MEASURES TAKEN AFTER A TRIP DURING PANDEMIC

Question: Which of the following did you do after your most recent trip on a commercial airline? (Select all that apply)



Question: Which of the following did you do AFTER YOUR MOST RECENT ROAD TRIP? (Select all that apply)

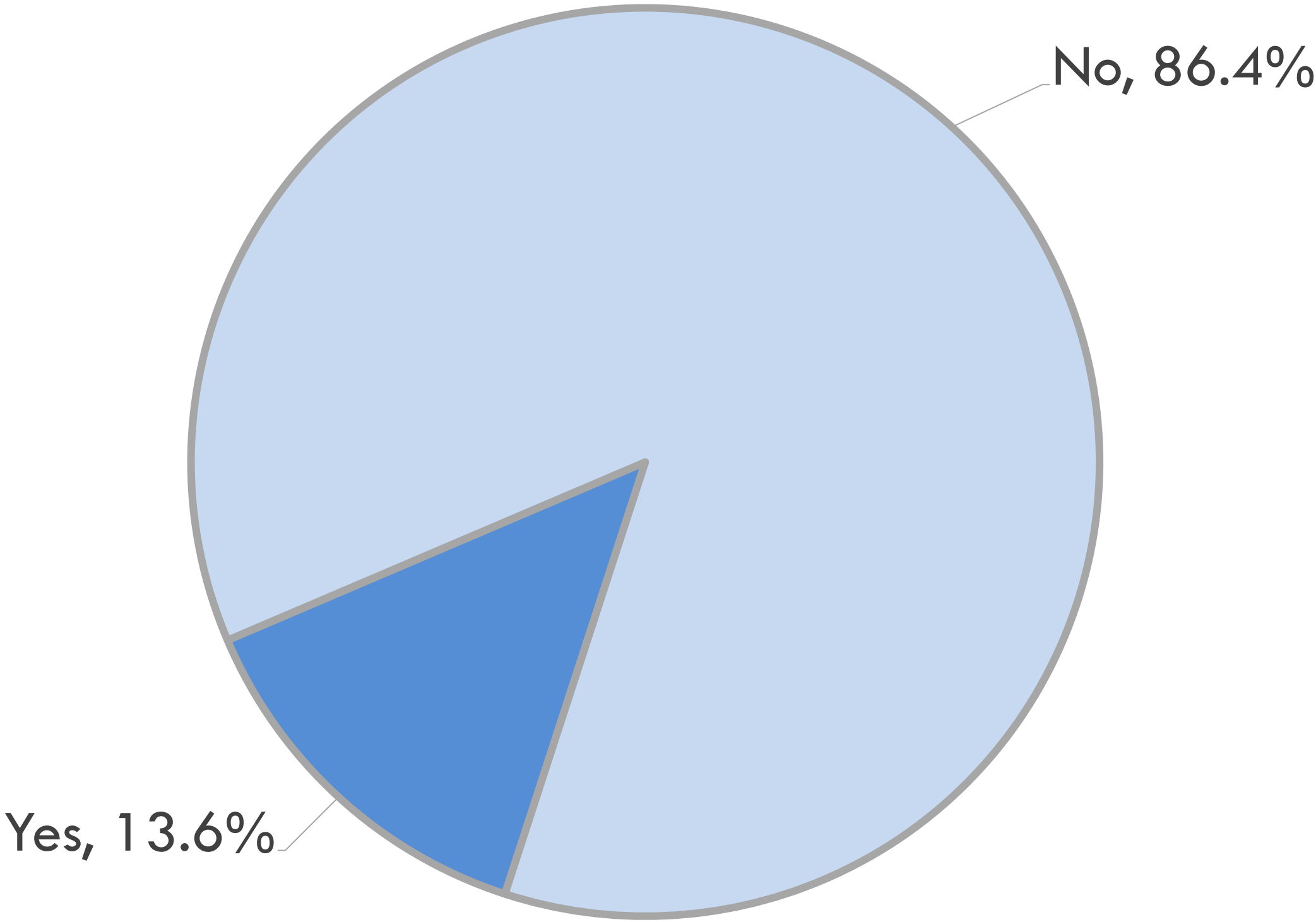


(Base: Wave 38 data. Respondents who have taken a commercial airline/road trip since the start of the Coronavirus pandemic (March 2020 to today), 233/617 completed surveys. Data collected Nov 27-29, 2020)

THANKSGIVING TRAVEL

Question: Did you travel (or are you traveling) over the Thanksgiving Holiday this year?

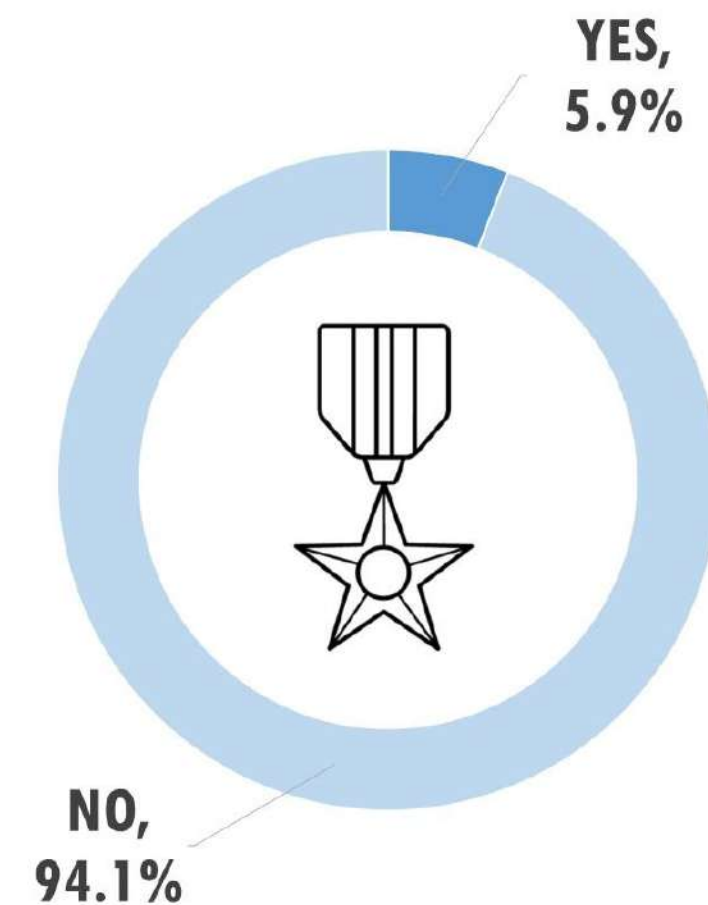
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



HOLIDAY TRAVEL DURING THE COVID-19 PANDEMIC:

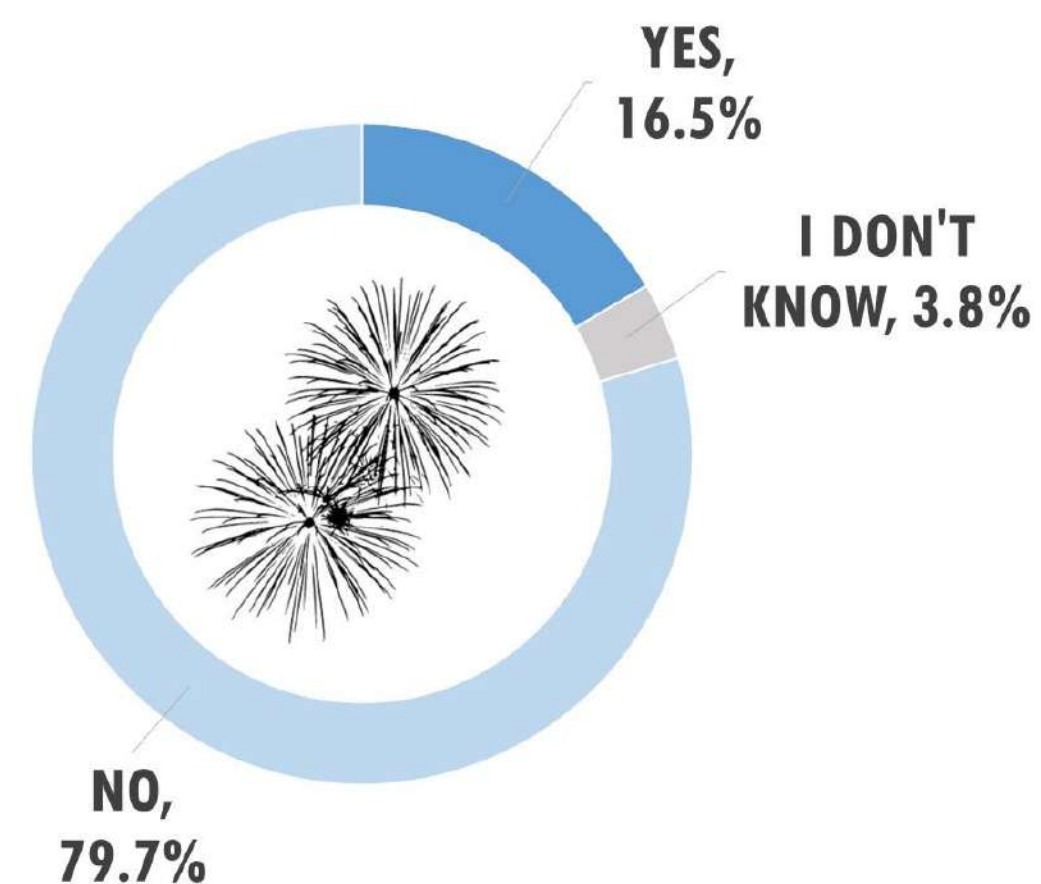
MEMORIAL DAY | FOURTH OF JULY | LABOR DAY | THANKSGIVING

Memorial Day Weekend



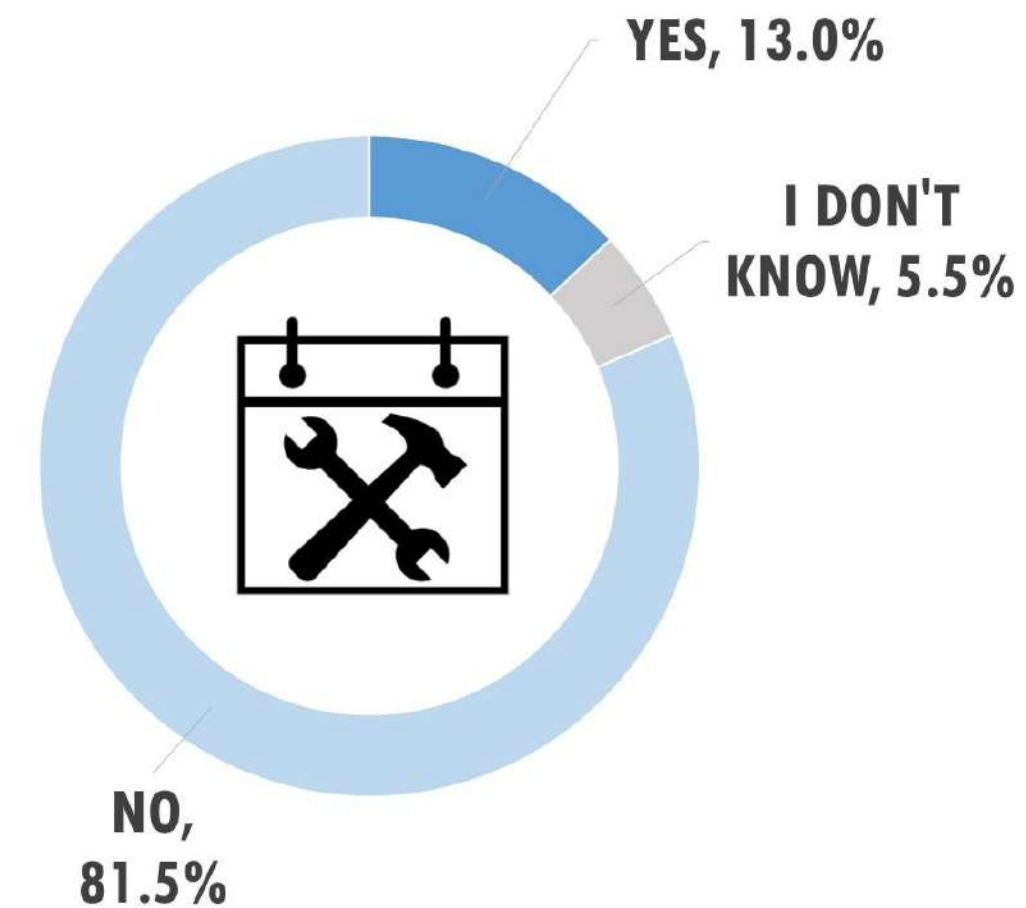
(Base: Wave 11. All respondents, 1,223 completed surveys. Data collected May 22-24, 2020)

Fourth of July Weekend



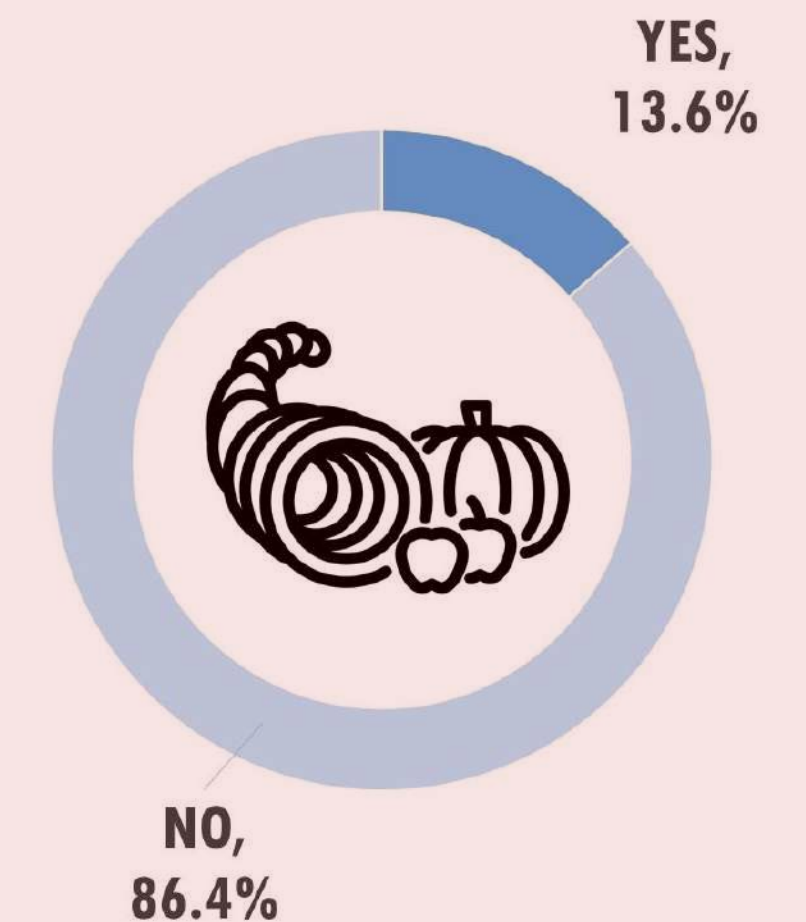
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

Labor Day Weekend



(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)

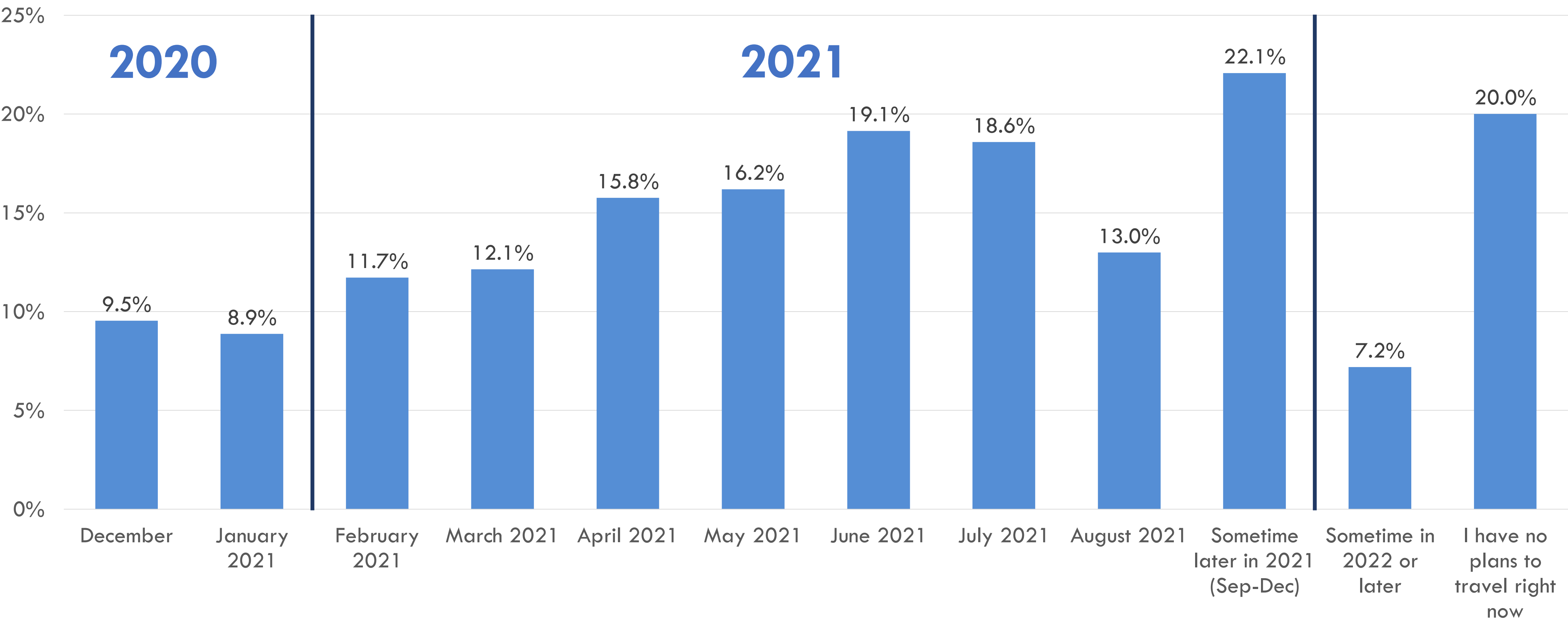
Thanksgiving



(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

UPCOMING TRAVEL PLANS

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

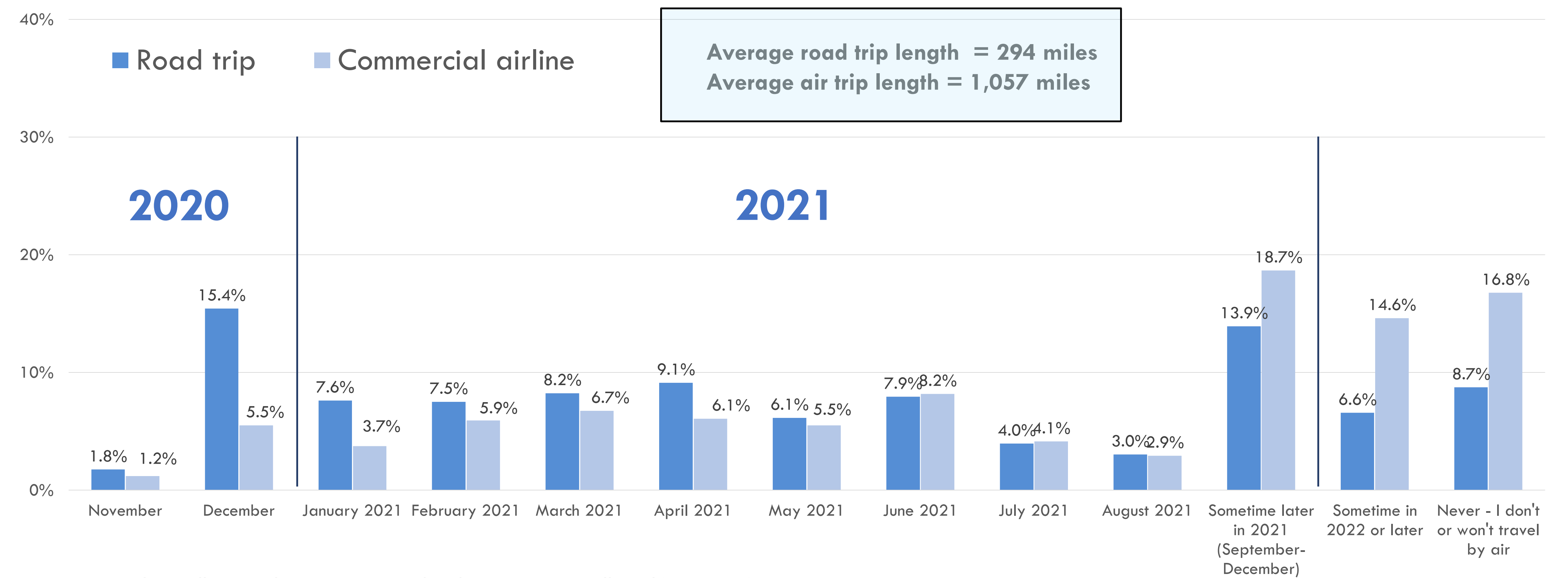


(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

MONTH OF NEXT AIR & ROAD TRIP

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

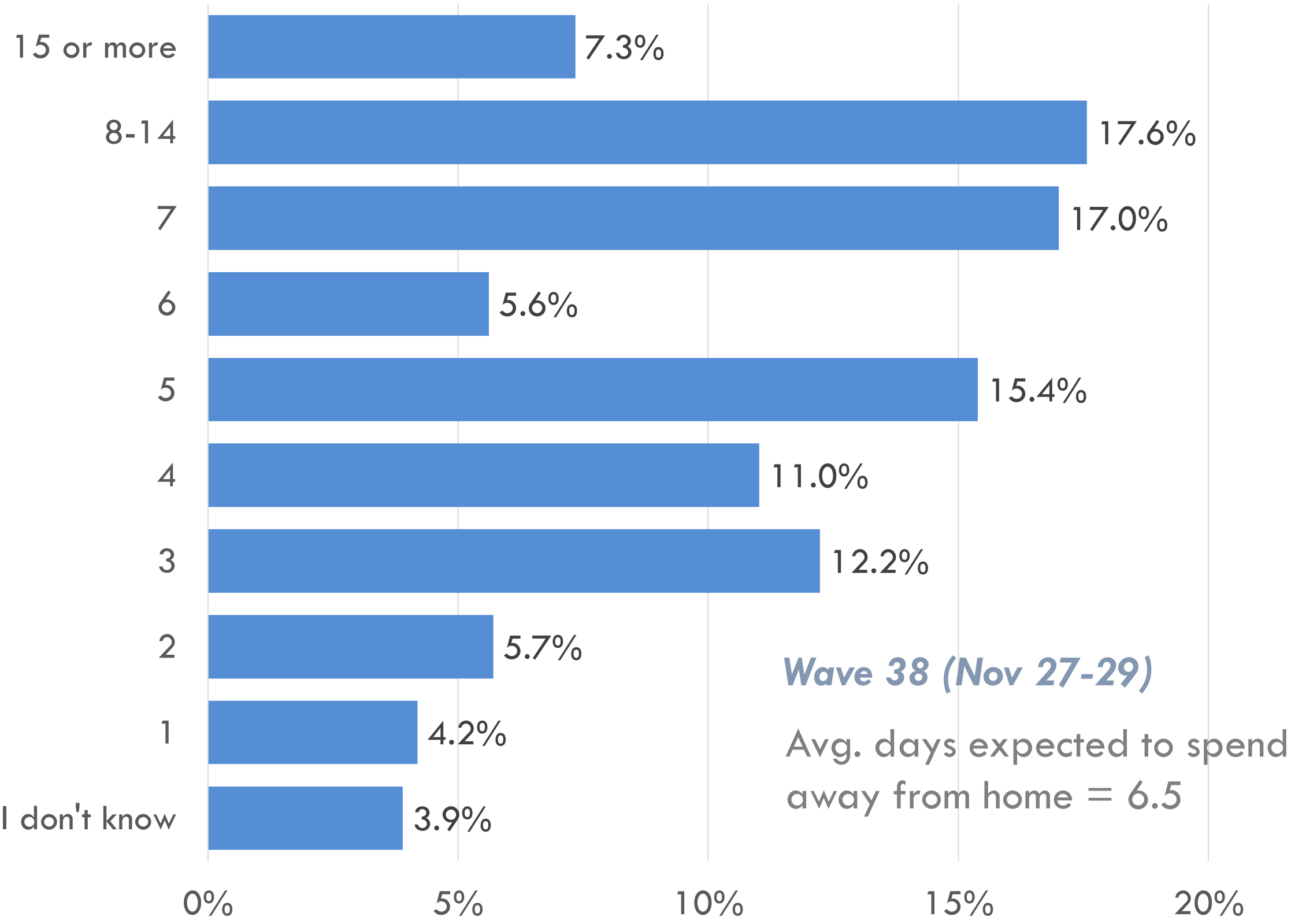
Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?



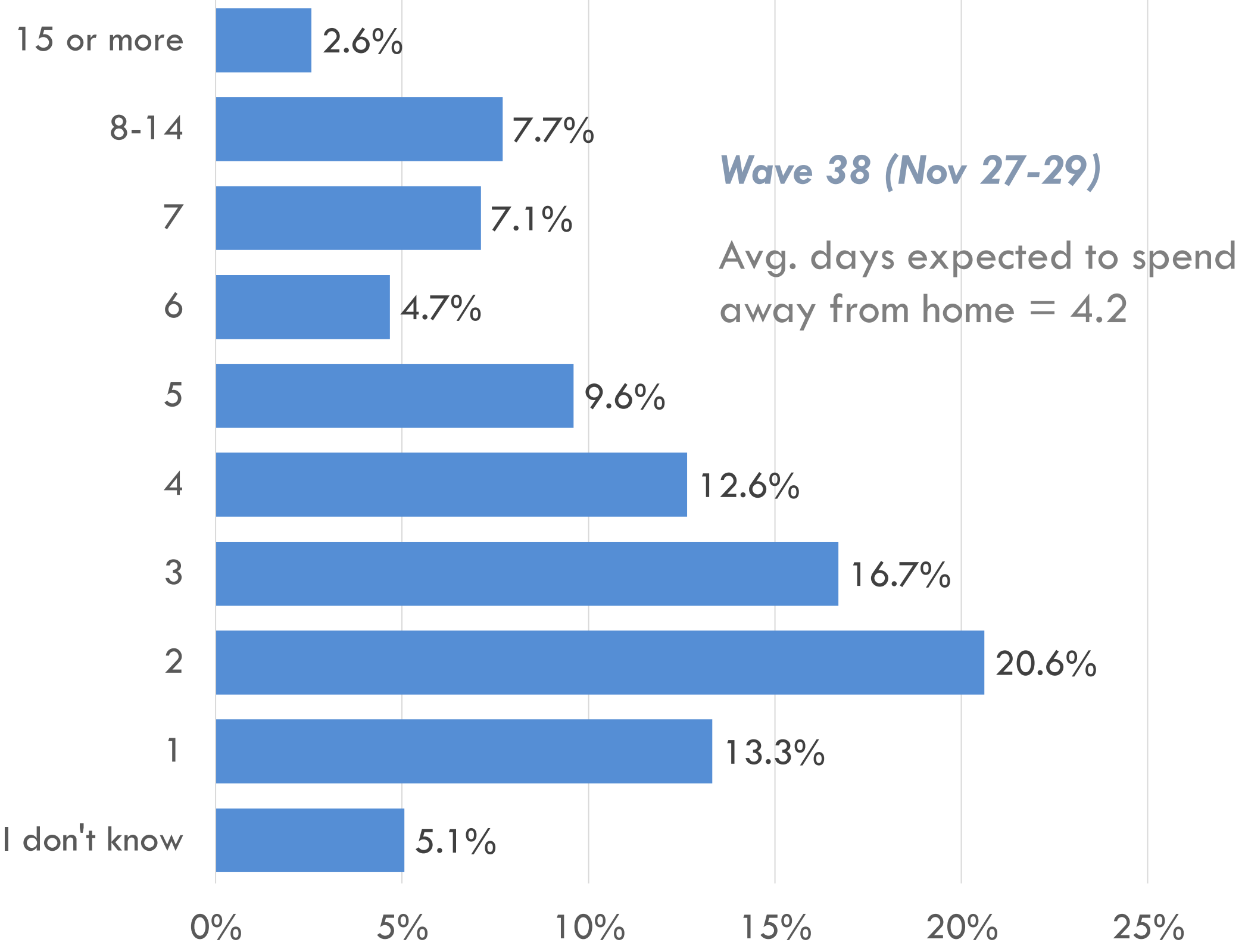
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

DAYS AWAY FROM HOME DURING NEXT AIR & ROAD TRIP

Question: On your next TRIP ON A COMMERCIAL AIRLINE, how many days away from home do you expect to spend? (Select one)



Question: On your next ROAD TRIP, how many days away from home do you expect to spend? (Select one)

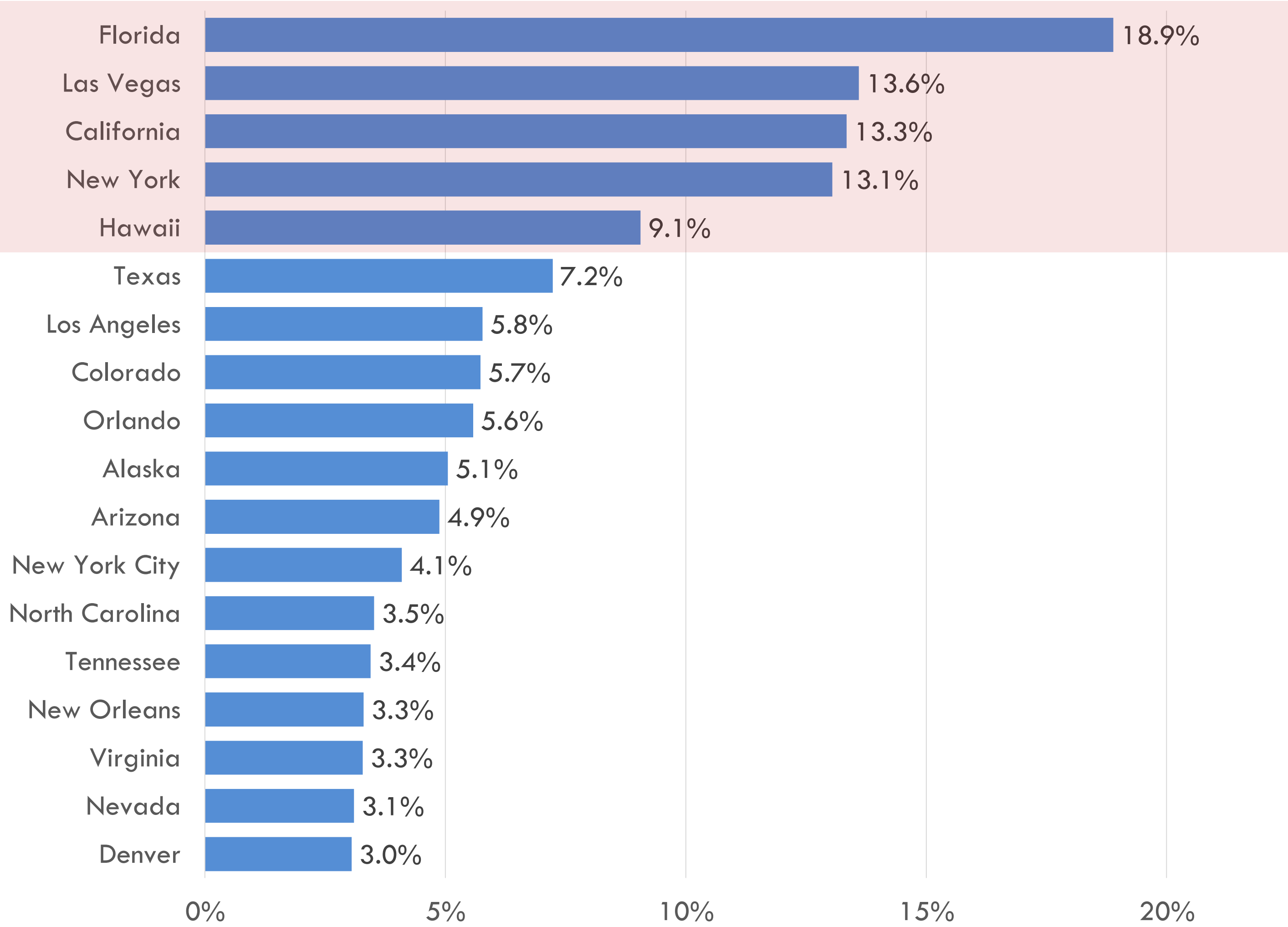


(Base: Wave 38 data. Respondents expecting to take a trip in the future on a commercial airline/road trip, 960/1,044 completed surveys. Data collected Nov 27-29, 2020)

MOST DESIRED TRAVEL DESTINATIONS IN THE NEXT 12 MONTHS

Question: What are the **THREE (3)** United States travel destinations that you most want to visit in the next **TWELVE (12) MONTHS?** (OPEN-ENDED QUESTION)

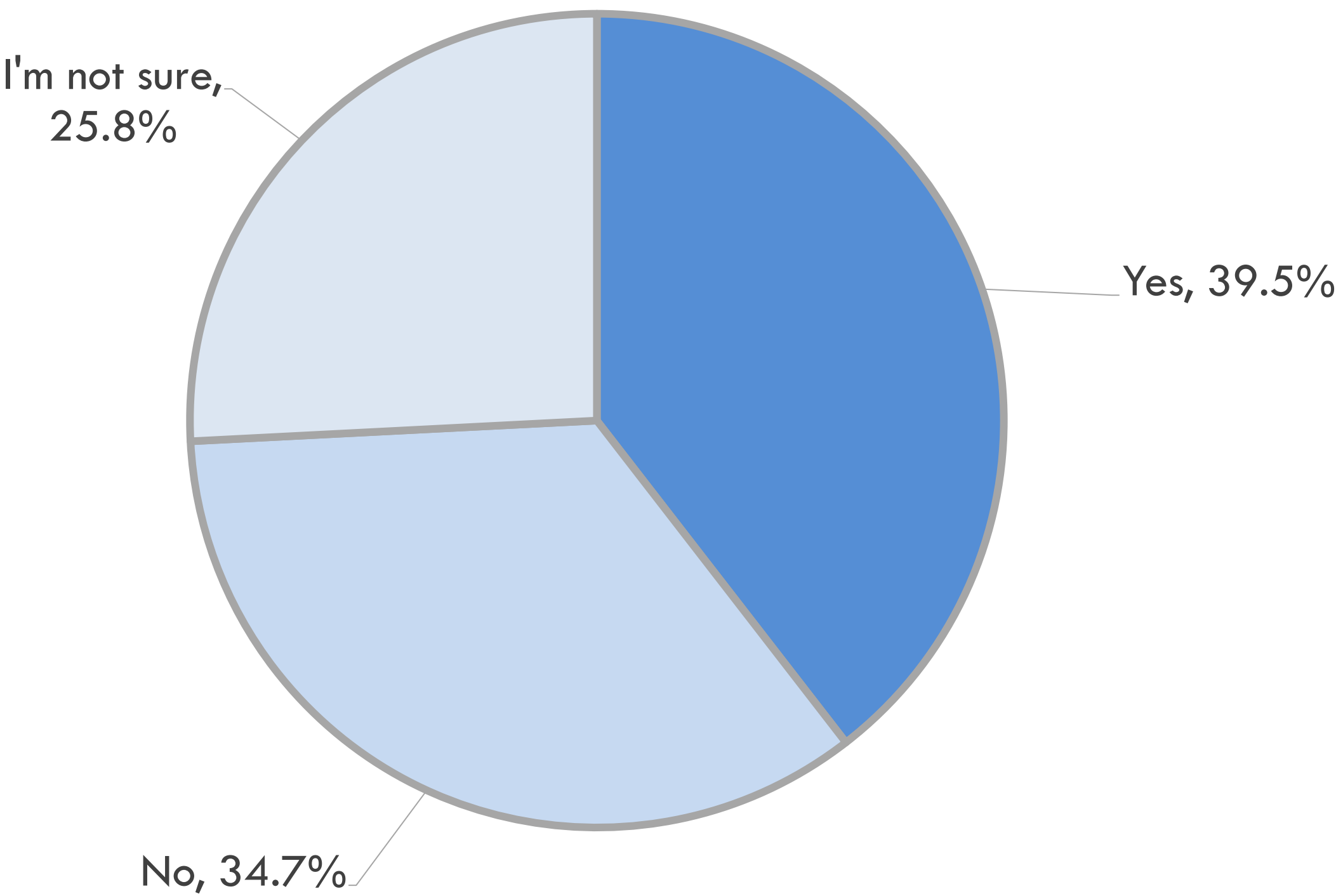
(Base: Wave 38 data. All respondents, 1,022 completed surveys. Data collected Nov 27-29, 2020)



COVID-19 TEST PRIOR TO NEXT TRIP

Question: Do you plan on taking a COVID-19 test prior to taking your next trip?

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

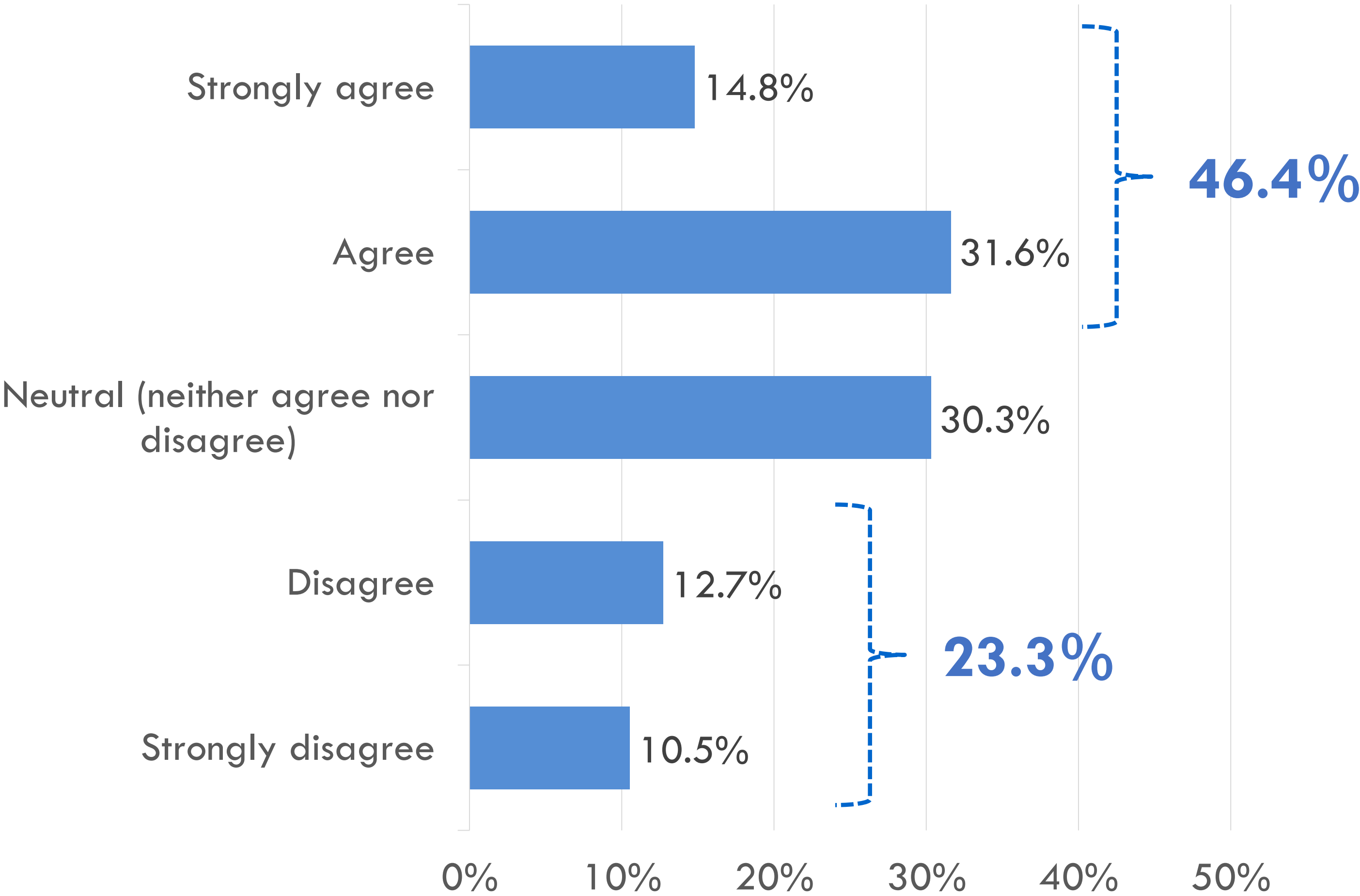


COMFORT TRAVELING IF OTHER TRAVELERS WERE TESTED

How much do you agree with the following statement?

Statement: I would feel more comfortable traveling if I knew other travelers were tested for COVID-19 before their travel.

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)





KEY TAKEAWAYS

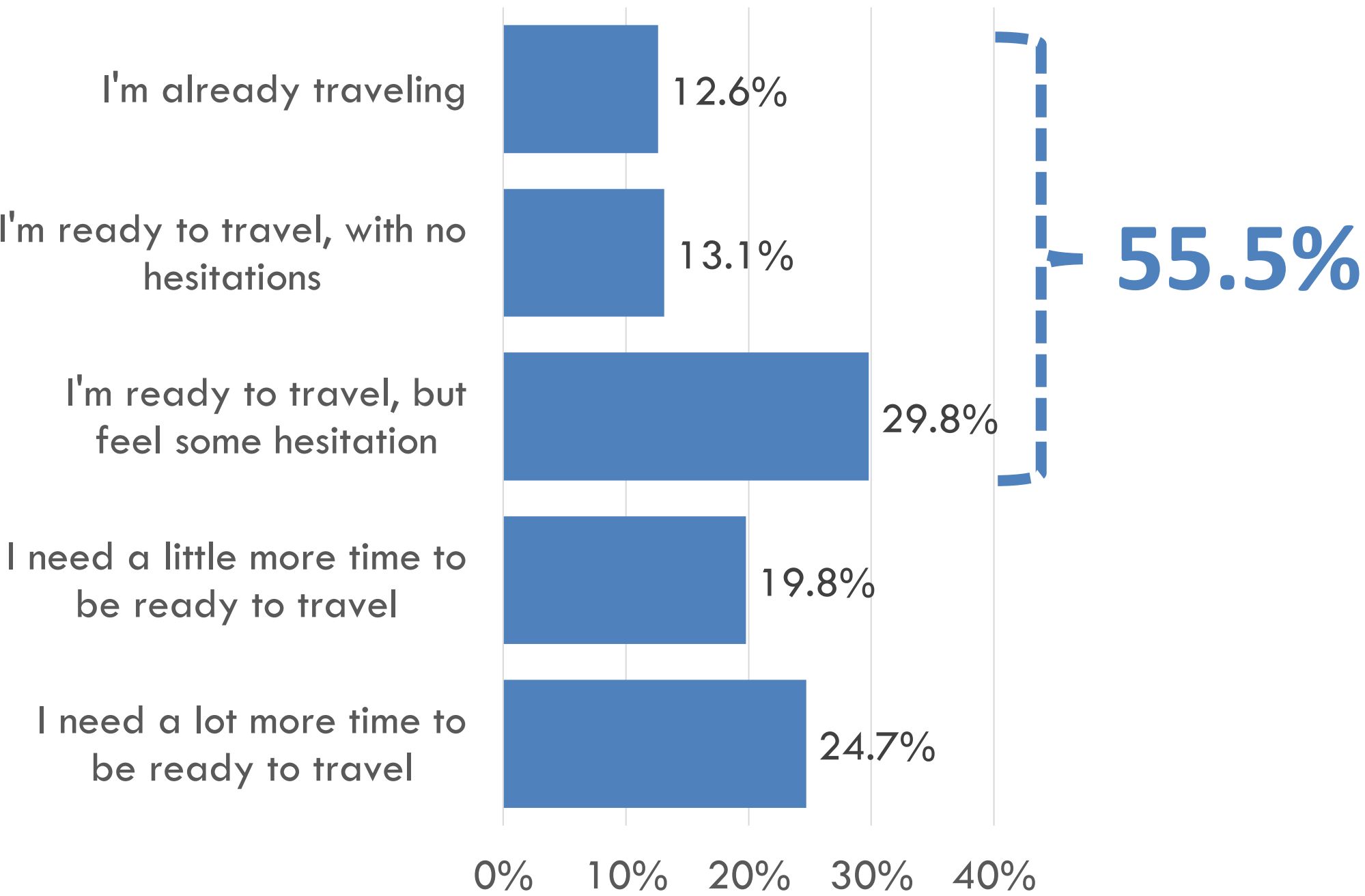
1. Travel has and will continue to happen: 77.6% of American travelers took at least one trip in 2020. Since the pandemic began in March, 20.7% have traveled by air, and 51.8% have at least one road trip. About 14% took a Thanksgiving trip
2. 80% of American travelers say they have at least tentative trip plans in the months ahead, with increasingly more reporting trip plans for summer 2021
3. Americans' Destination Hot List is looking quite close to pre-pandemic times
4. Americans are likelier to engage in COVID travel policies and recommendations—like quarantining and testing—after air travel. Nearly 40% plan to test themselves prior to their next trip.

CURRENT TRAVELER SENTIMENT



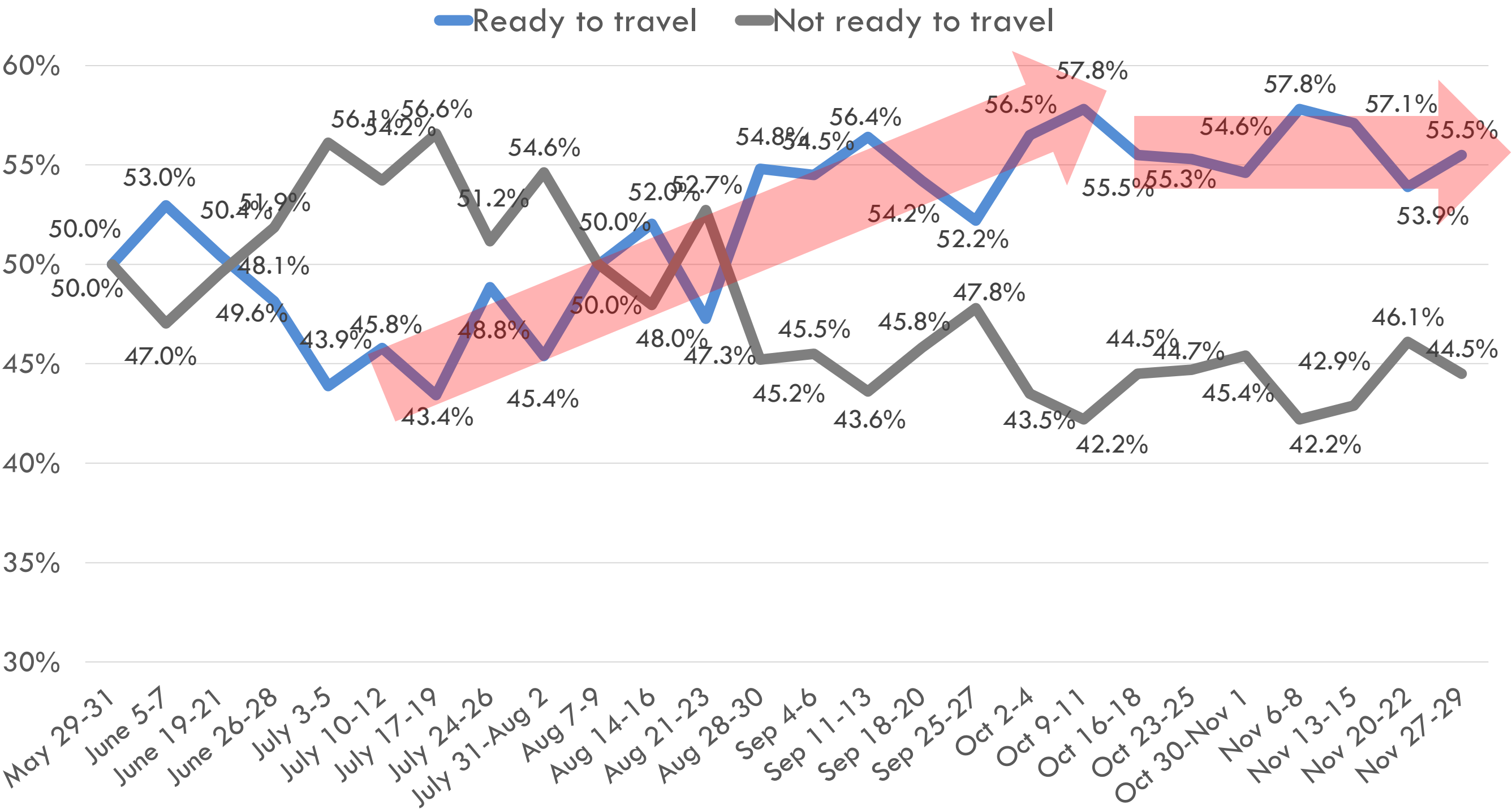
TRAVEL STATE-OF-MIND

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 15-37. 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, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.

Historical data

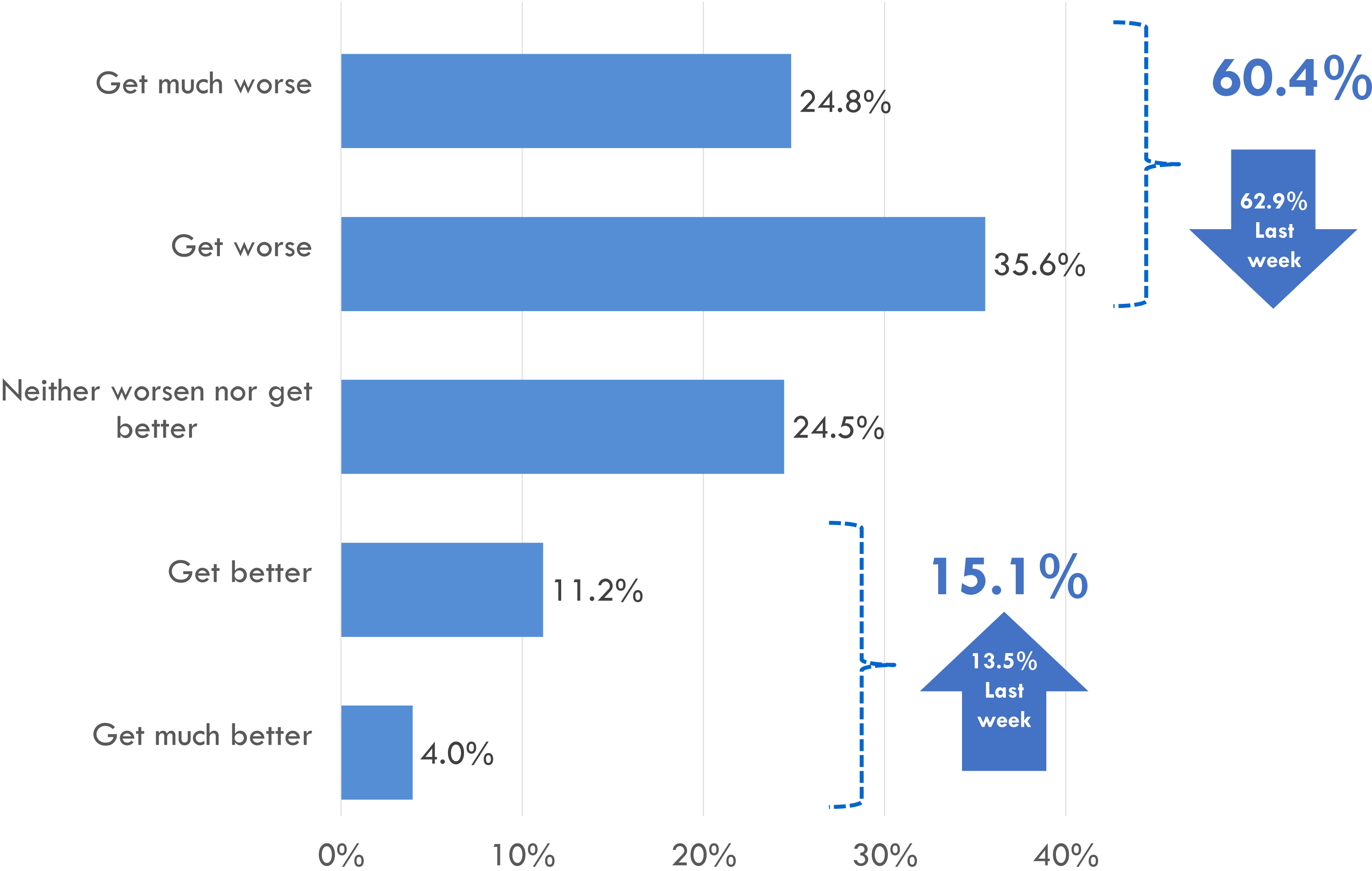


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

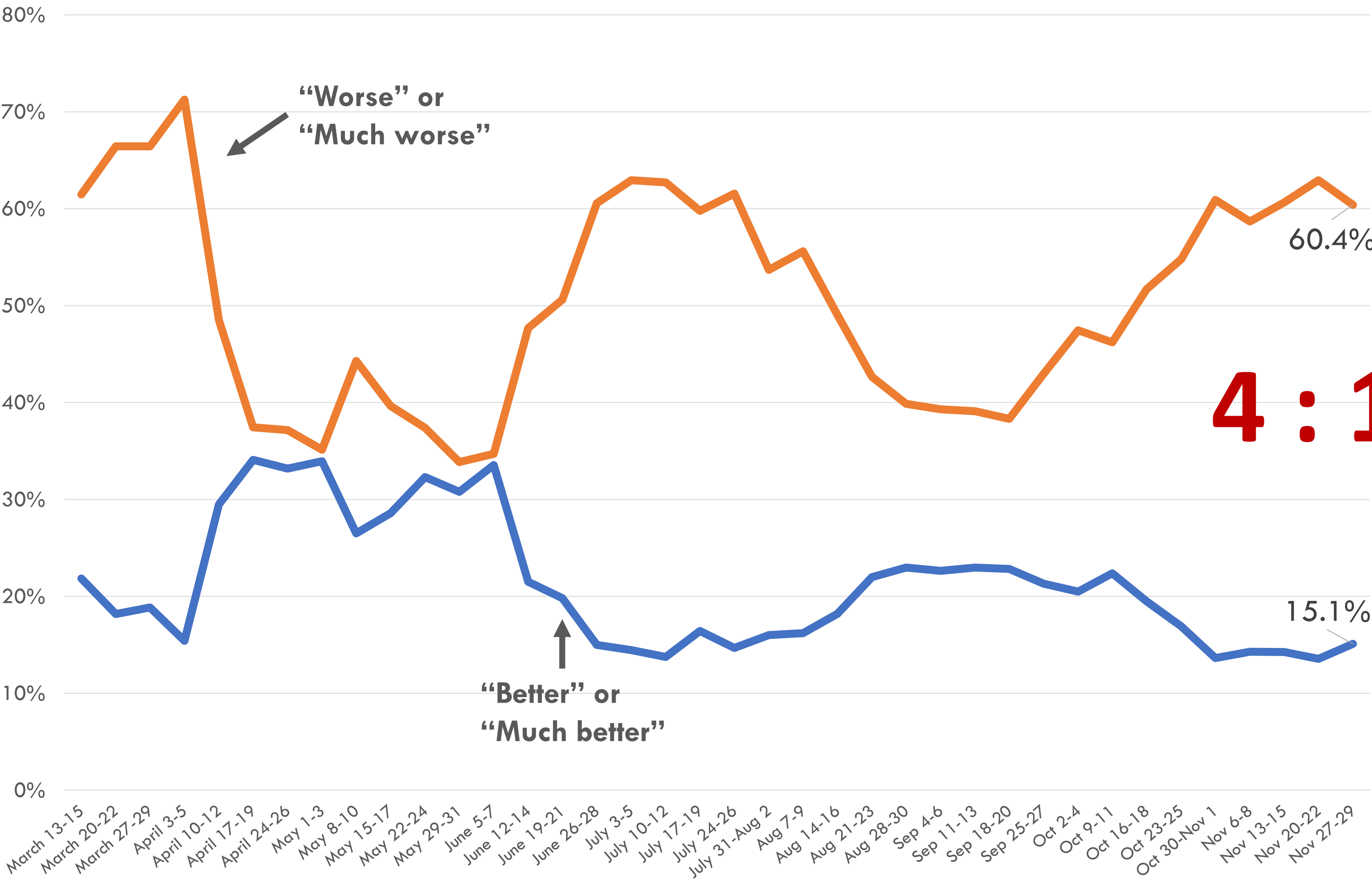


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-38)

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 _____

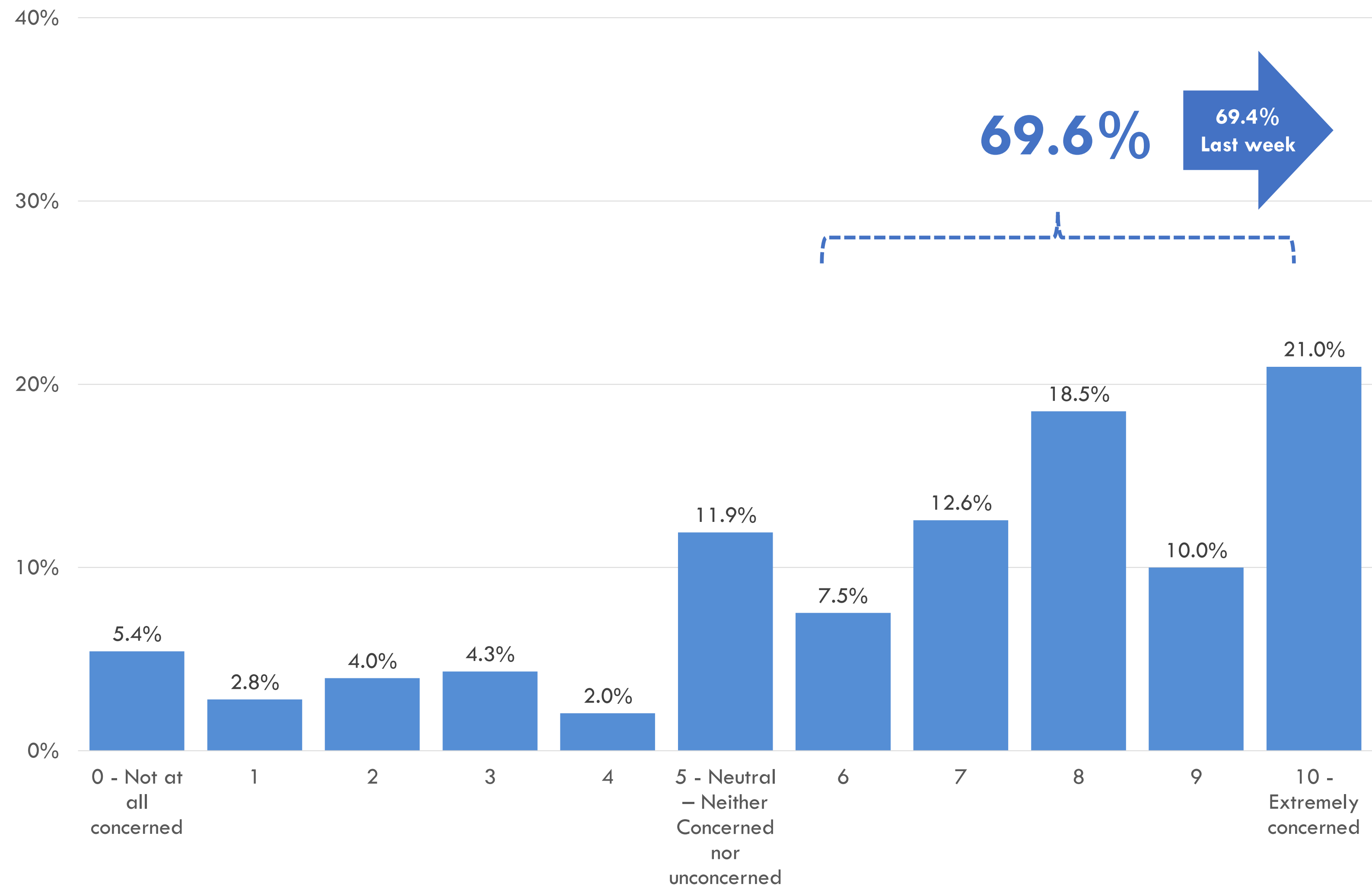
(Base: Waves 1-38. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 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)

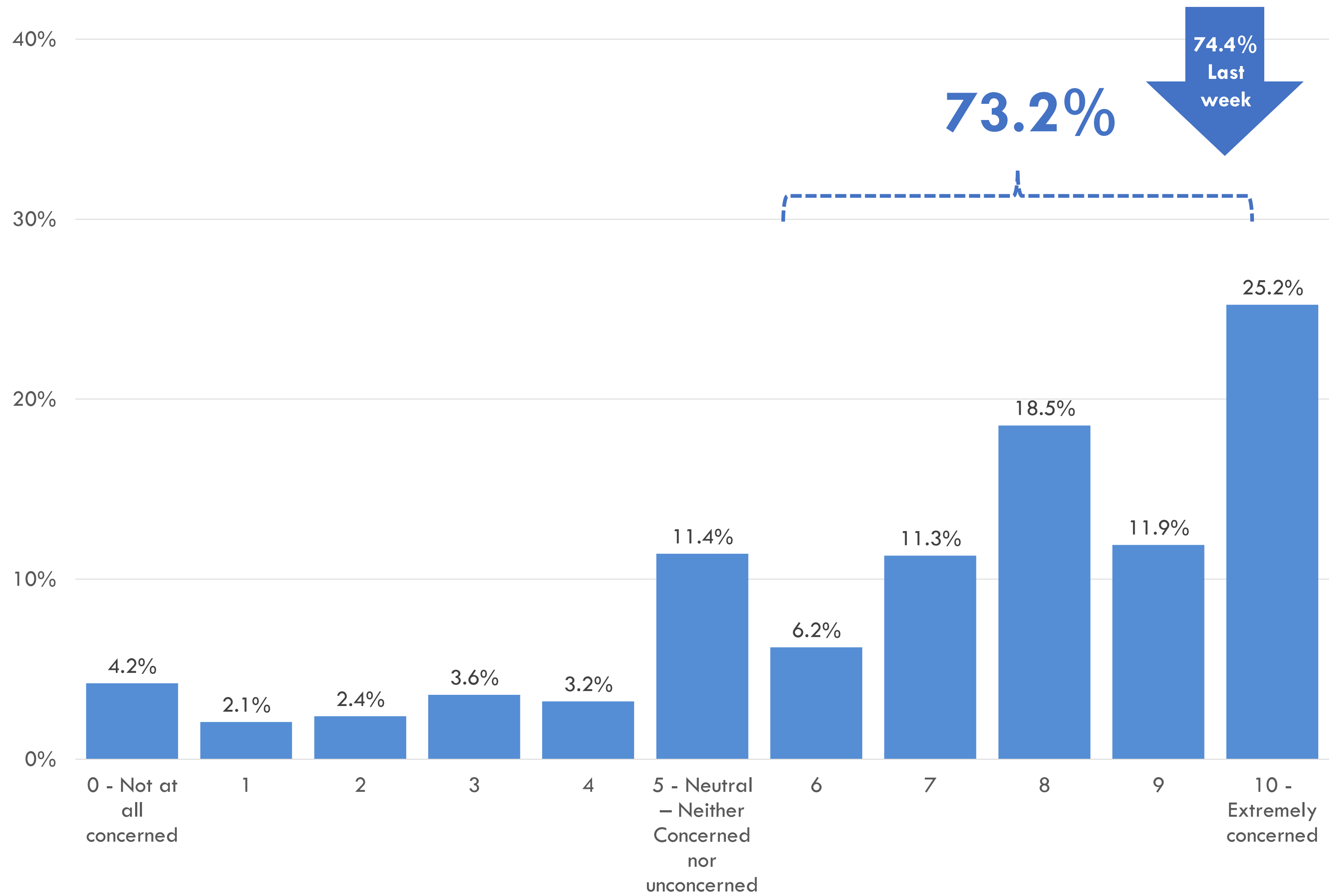
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)



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)

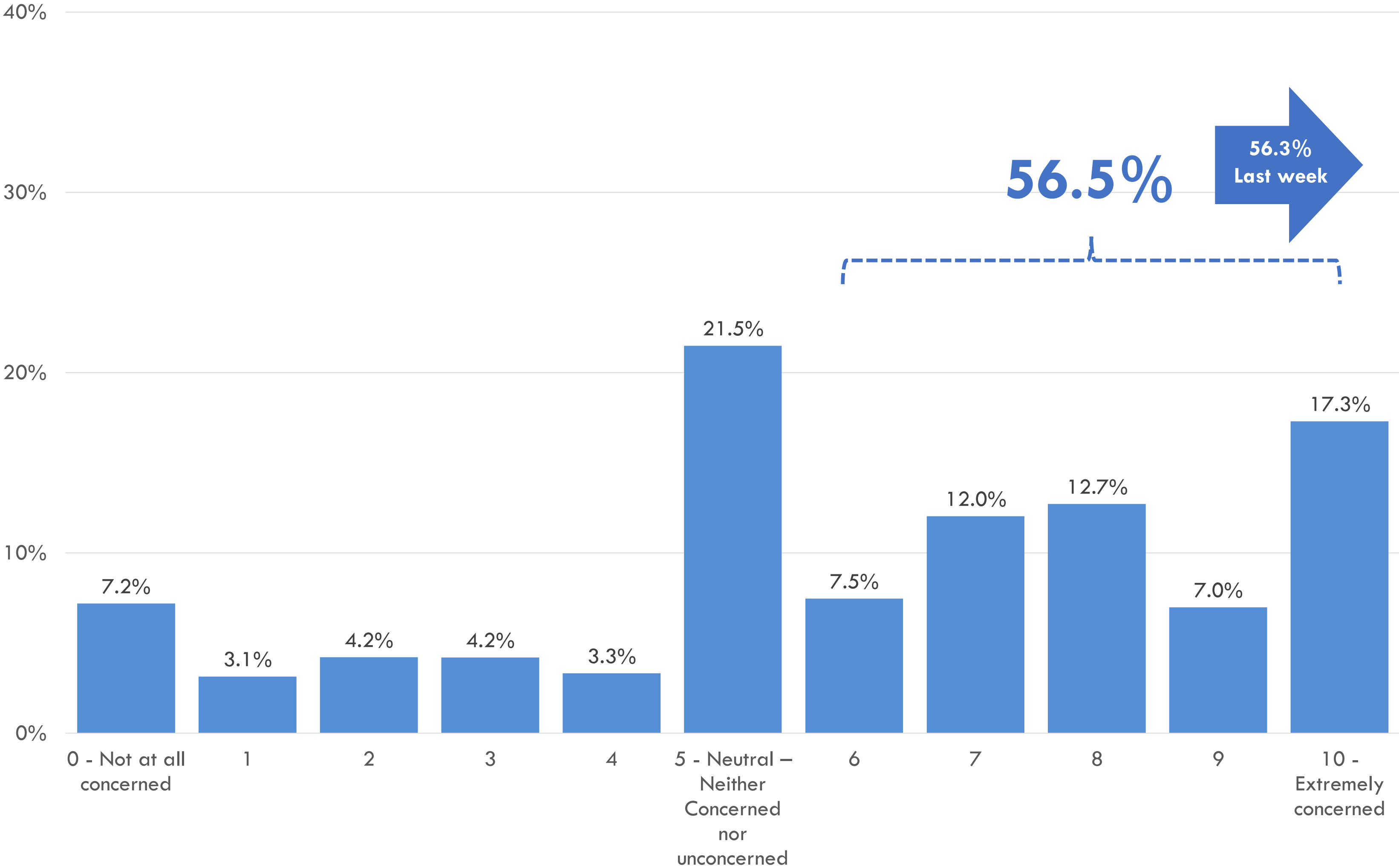
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)



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)

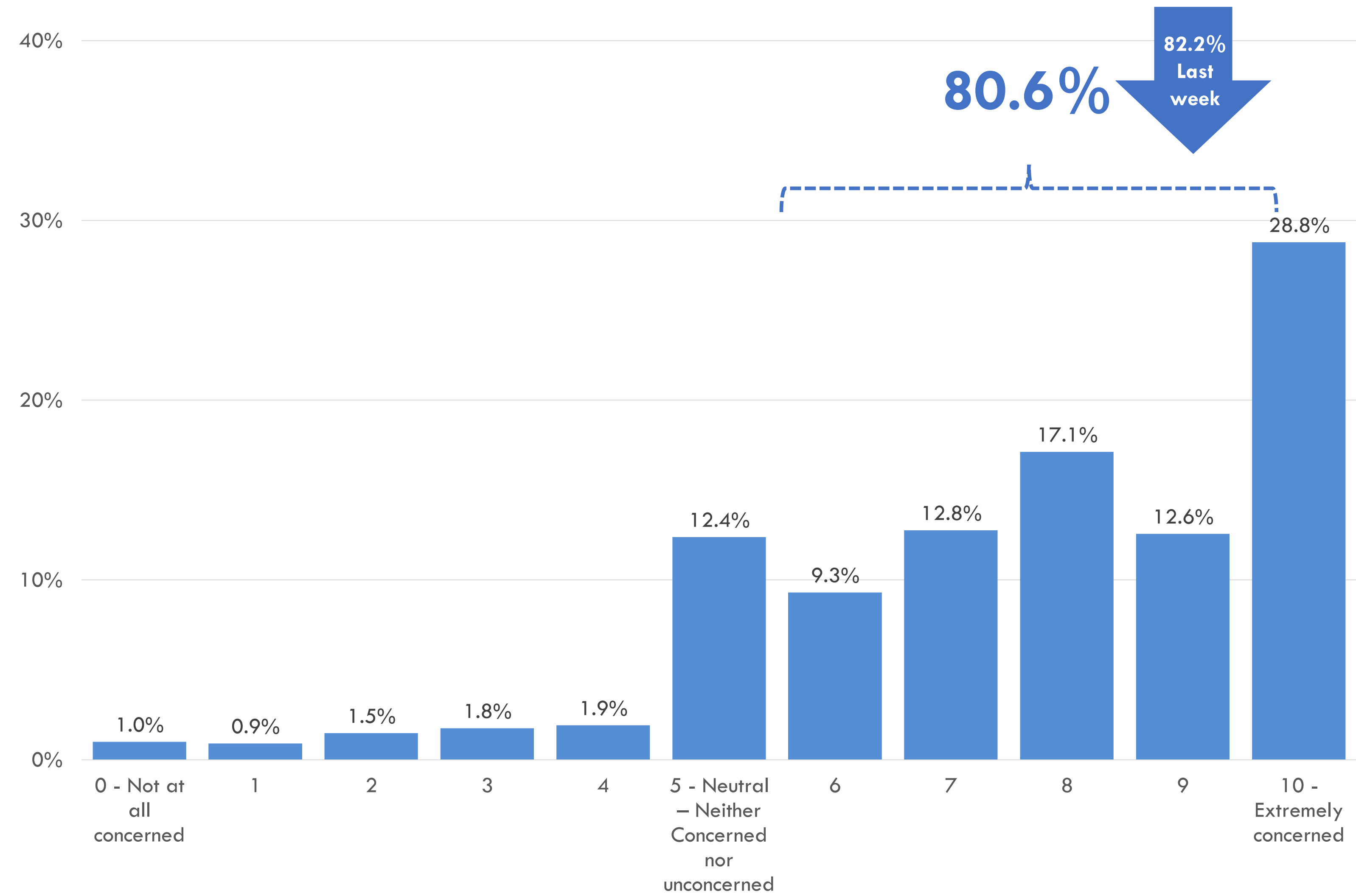
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)



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 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)



NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT AS OF NOVEMBER 30TH



NATIONAL
ECONOMY



HEALTH OF
FRIENDS & FAMILY

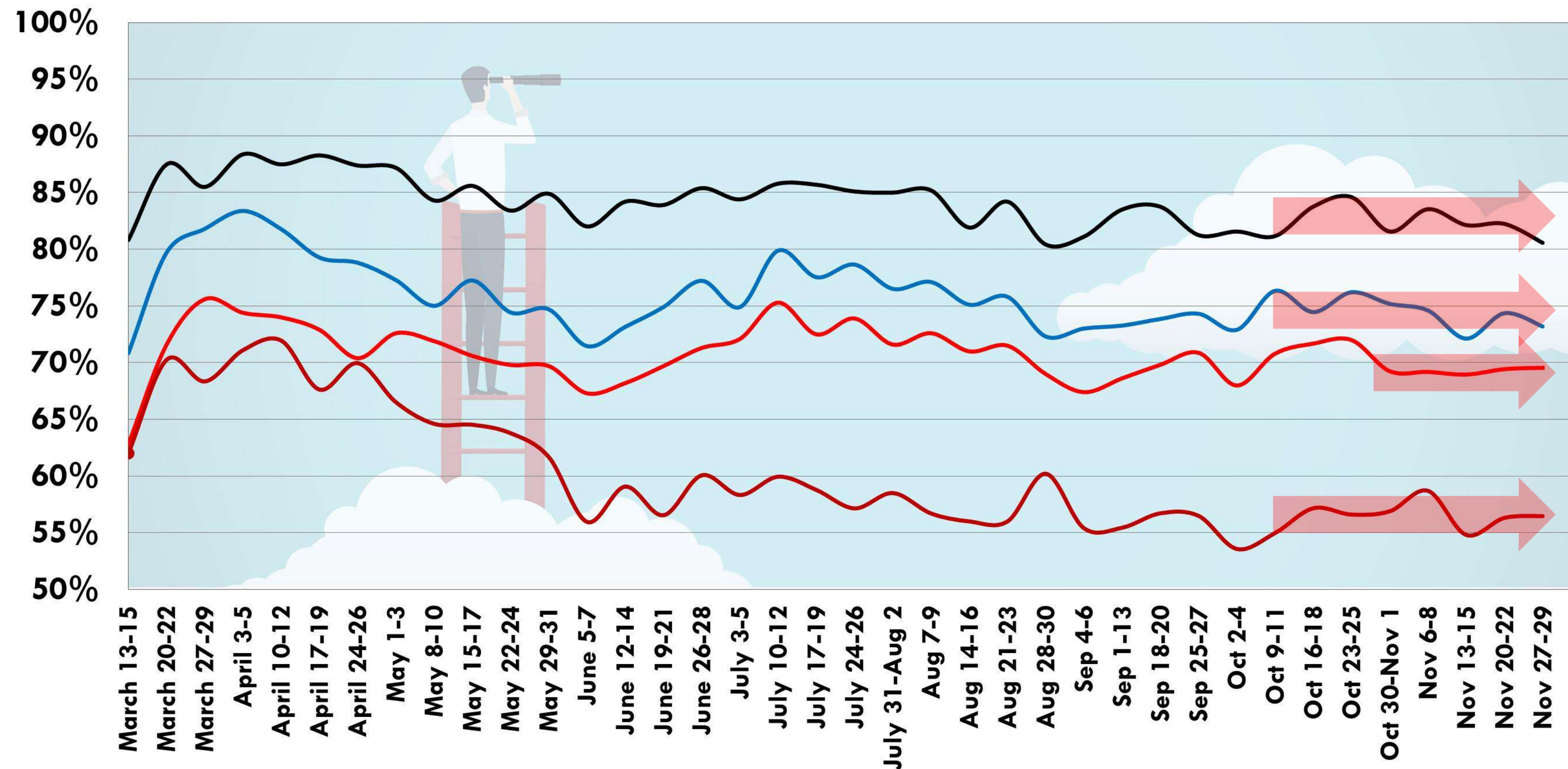


PERSONAL
HEALTH



PERSONAL
FINANCES

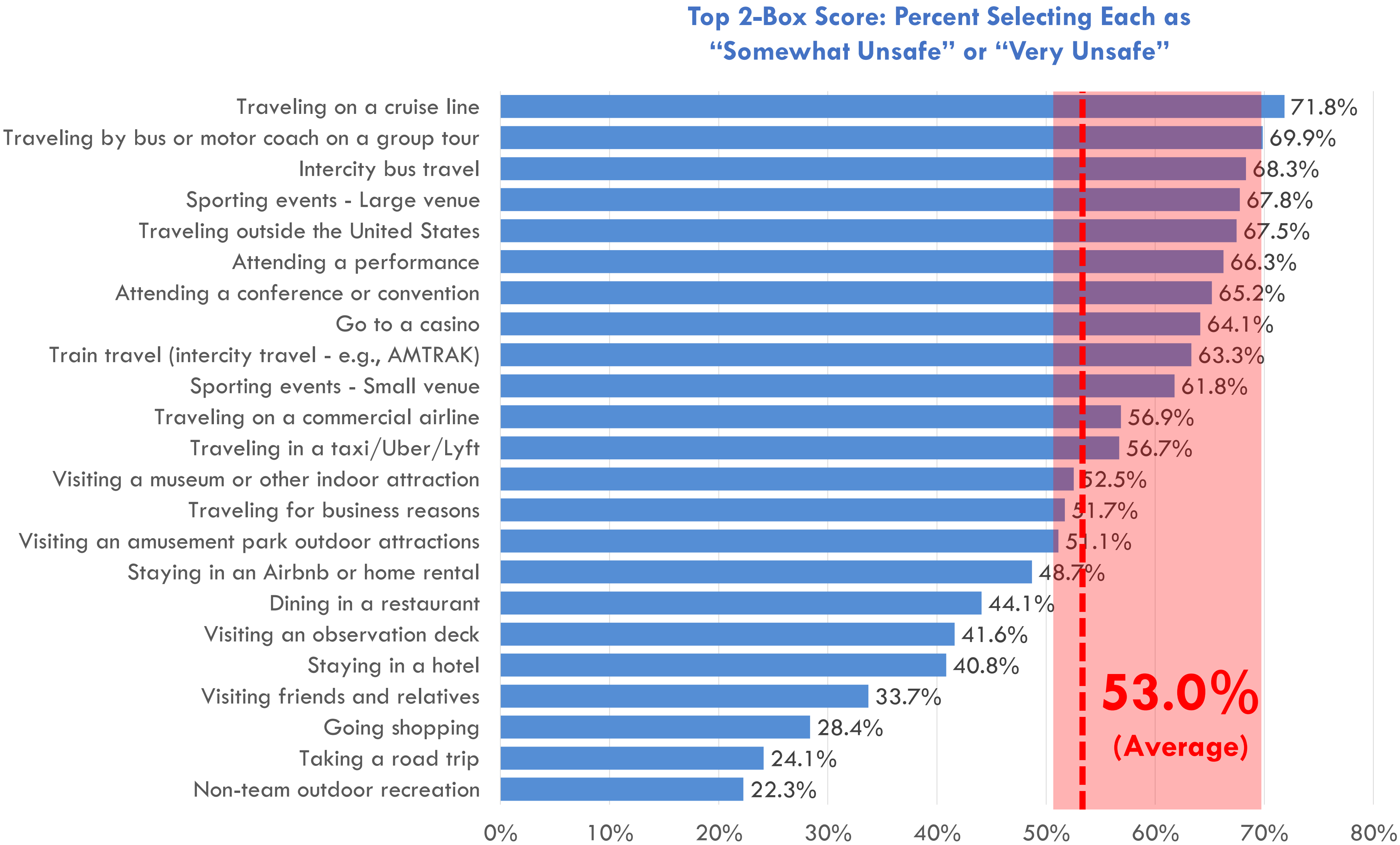
(% ANSWERING 10-6 ON 11-POINT SCALE)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 38)

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

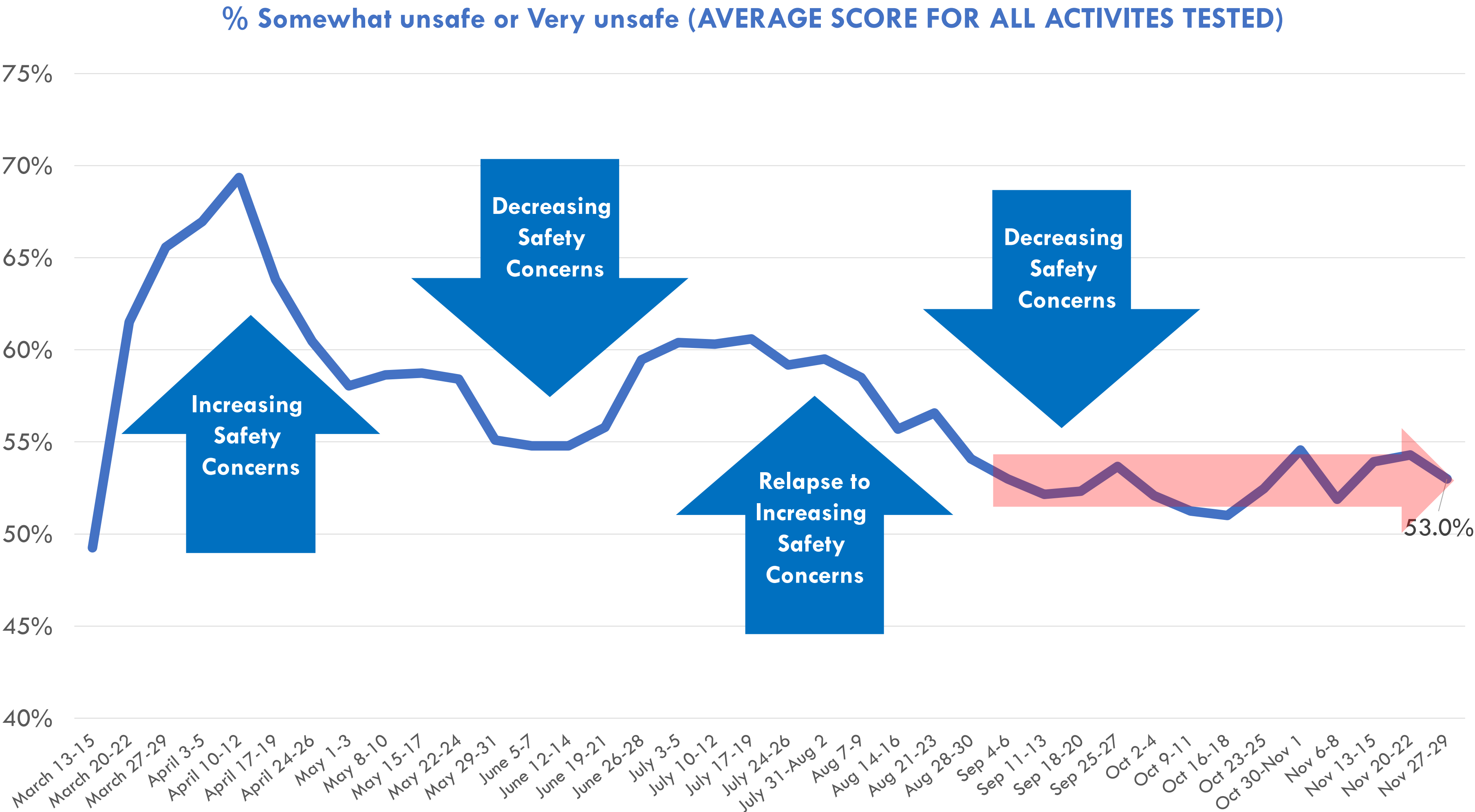
(Base: Wave 38 data. All respondents, 1,205 completed surveys.
Data collected Nov 27-29, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-38 COMPARISON)

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

(Base: Waves 1-38. 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, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 completed surveys.)

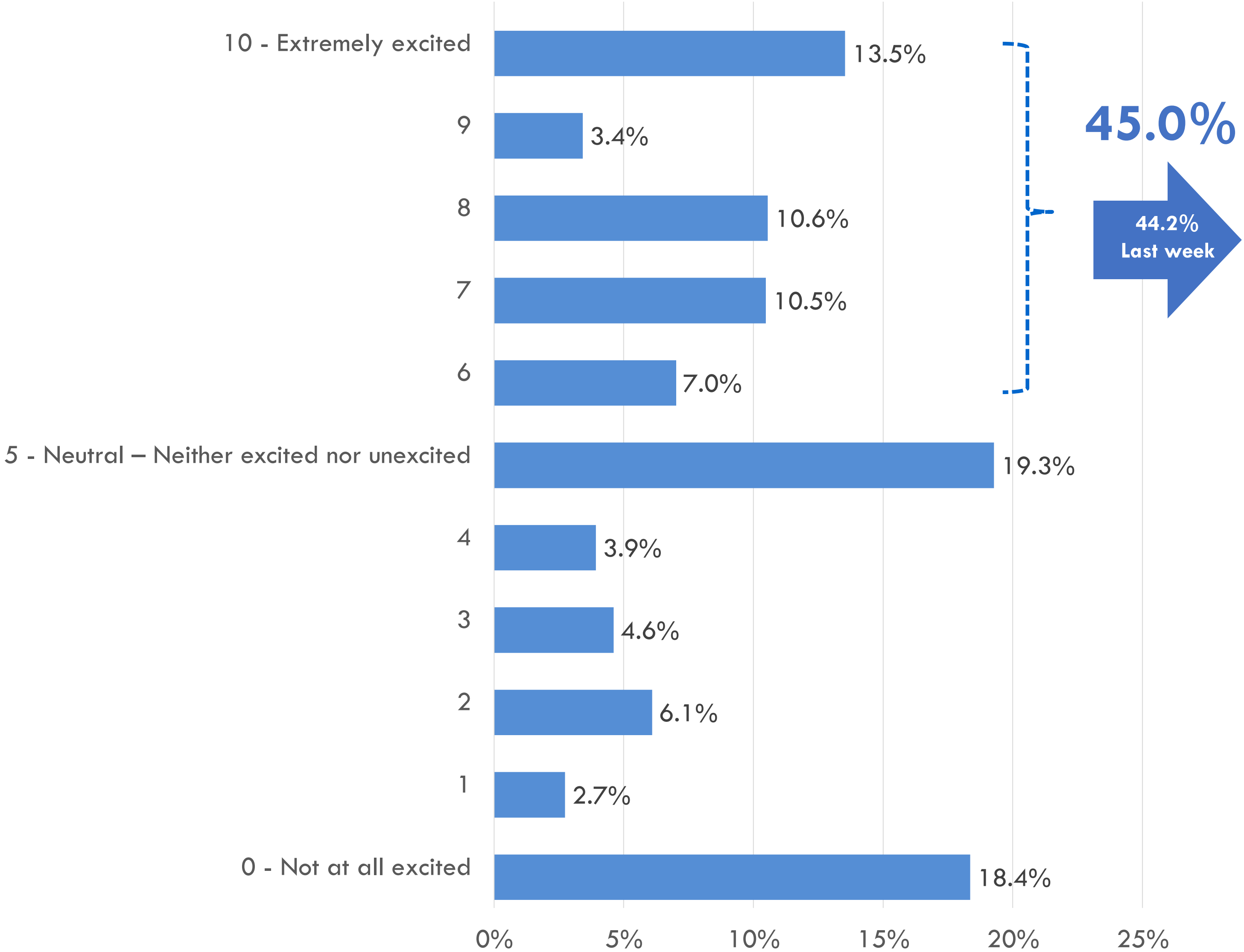


EXCITEMENT TO TRAVEL NOW

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 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

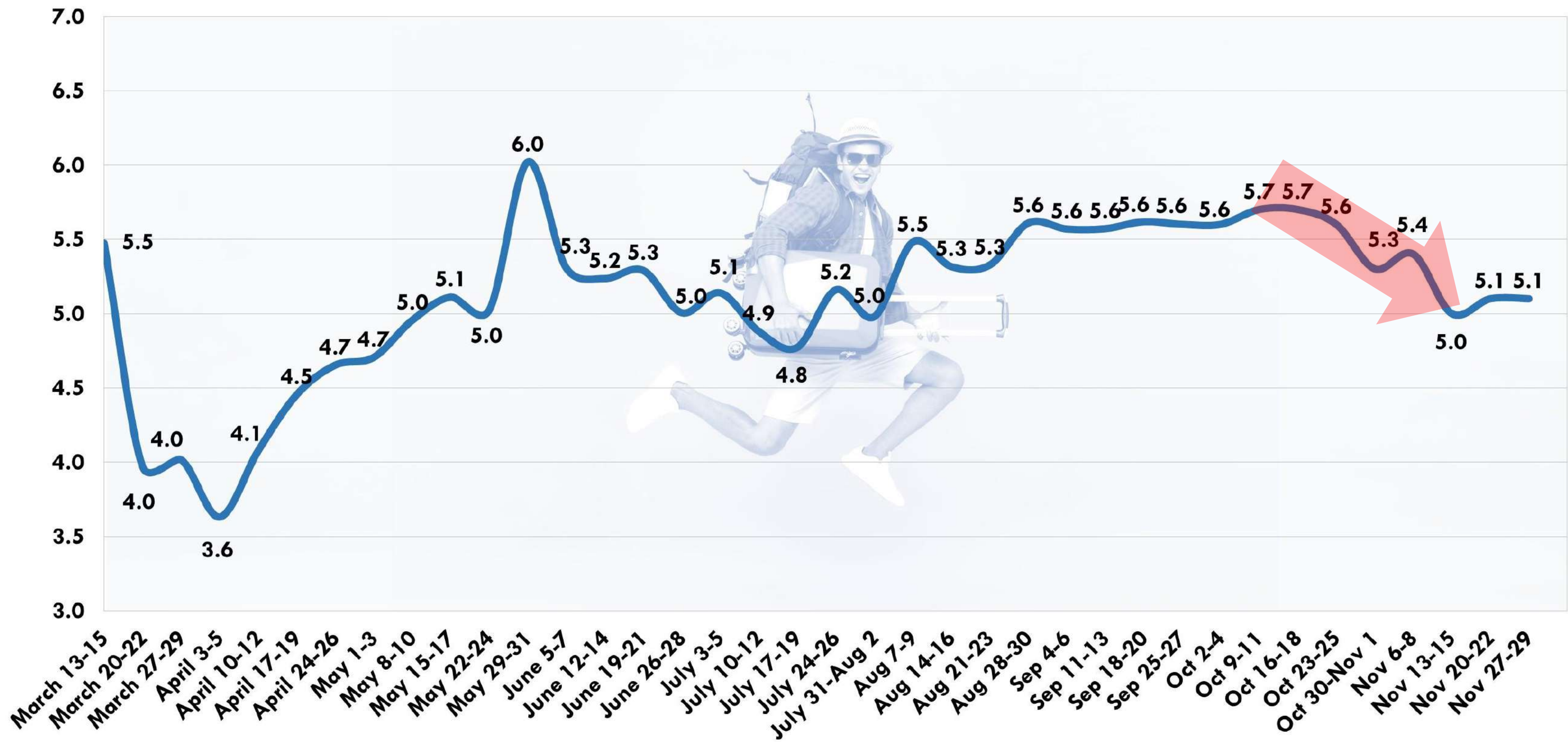


EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – NOVEMBER 29



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

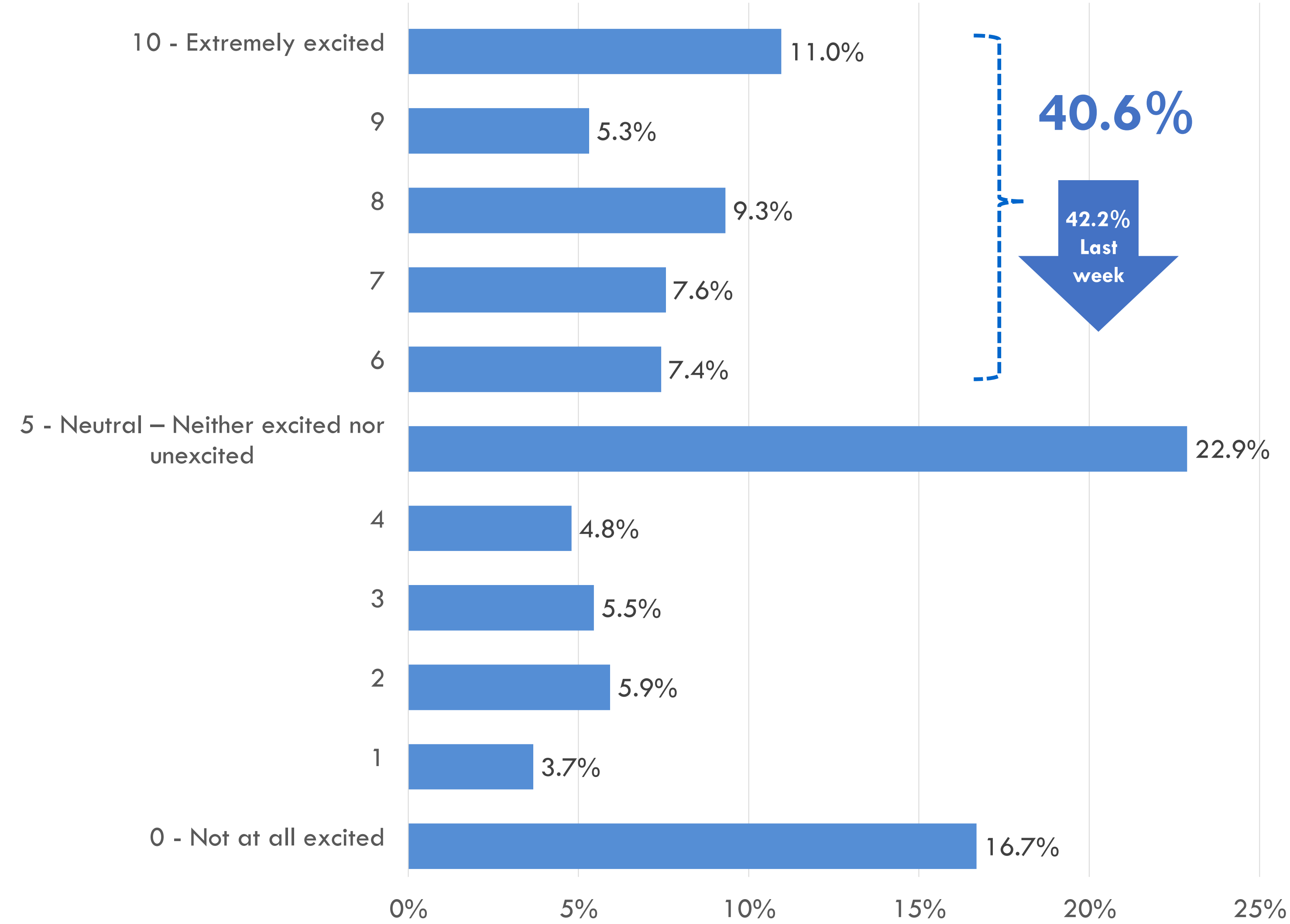


QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

OPENNESS TO TRAVEL INSPIRATION

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

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

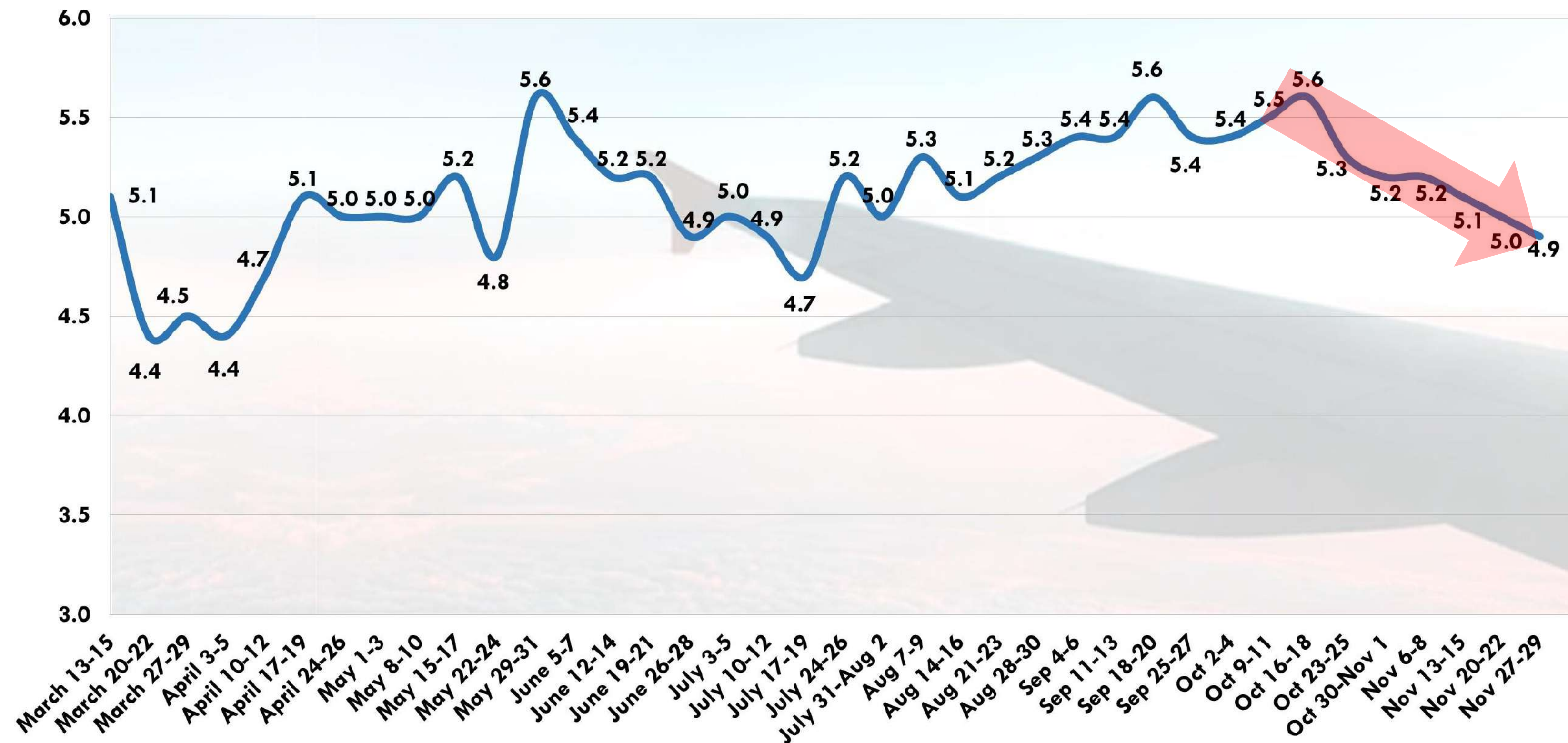


OPENNESS TO TRAVEL INSPIRATION

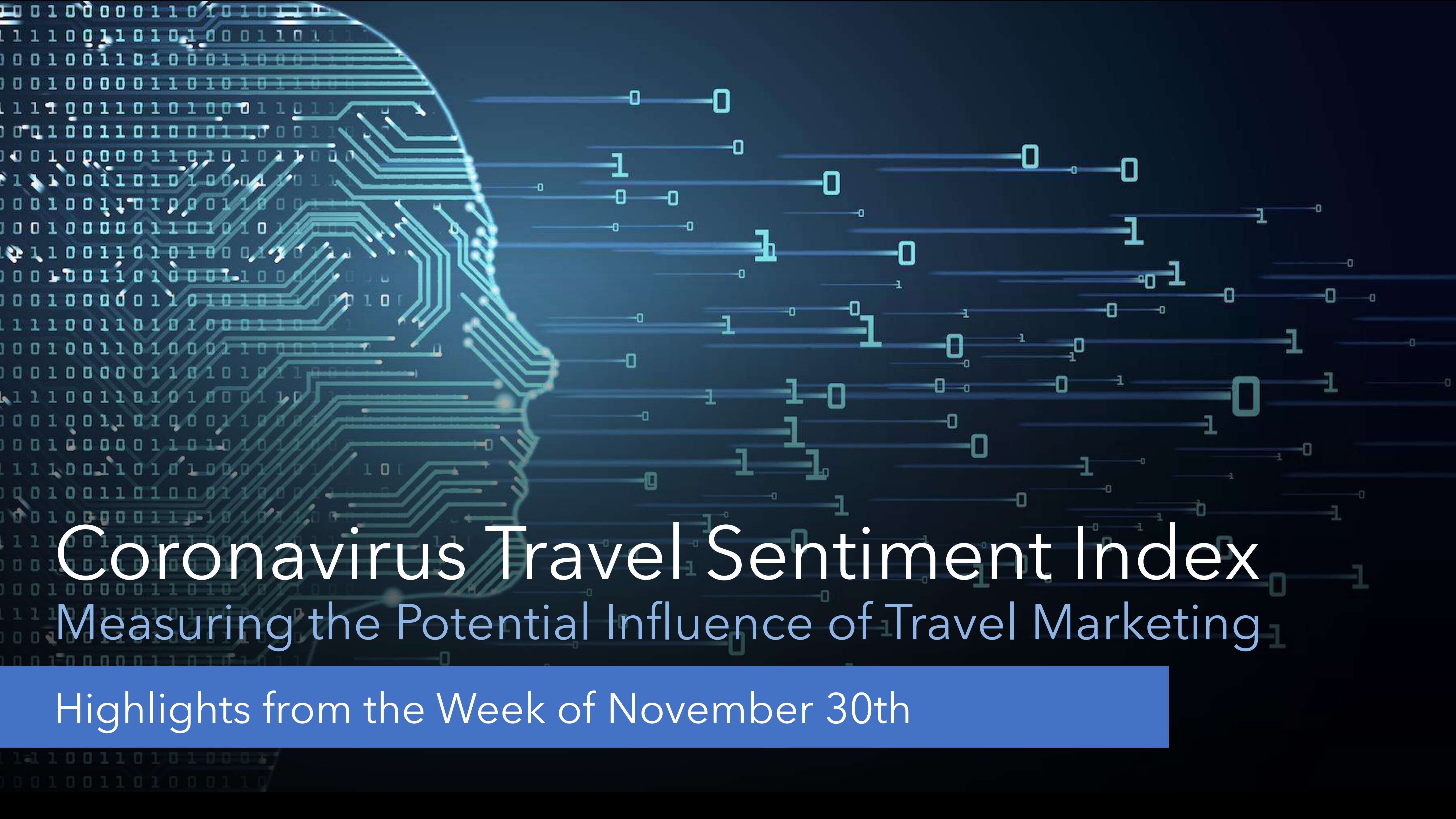
MARCH 13 – NOVEMBER 29



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



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

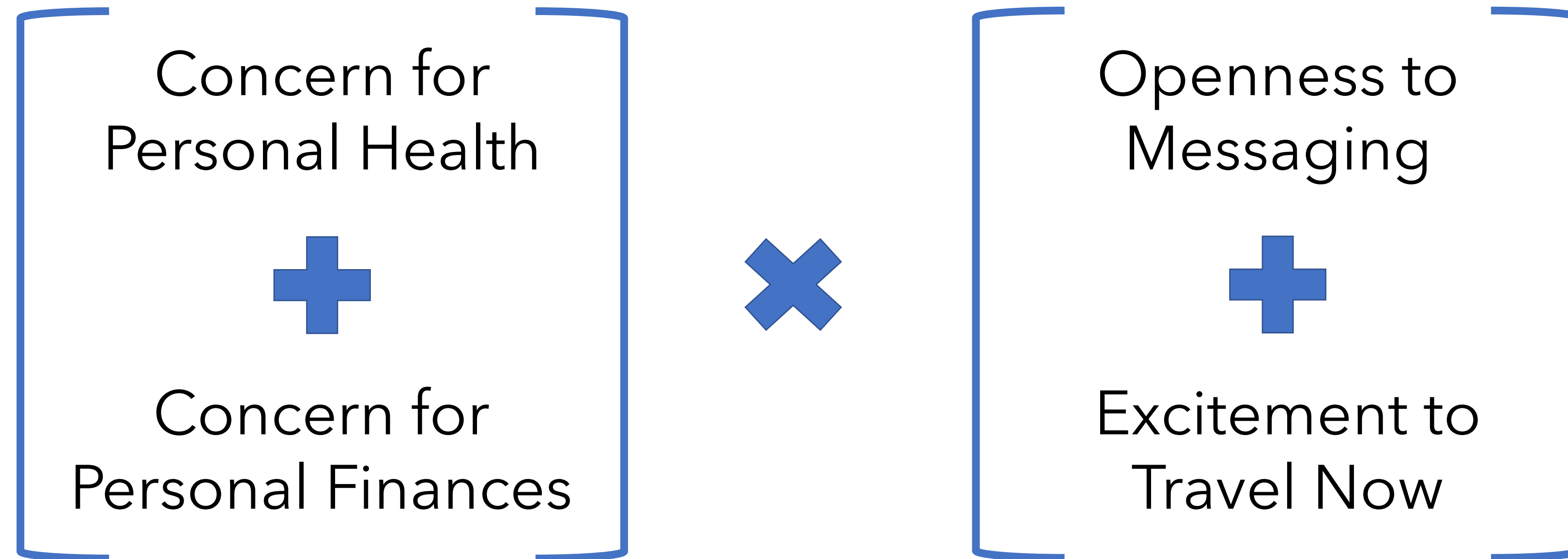


Coronavirus Travel Sentiment Index

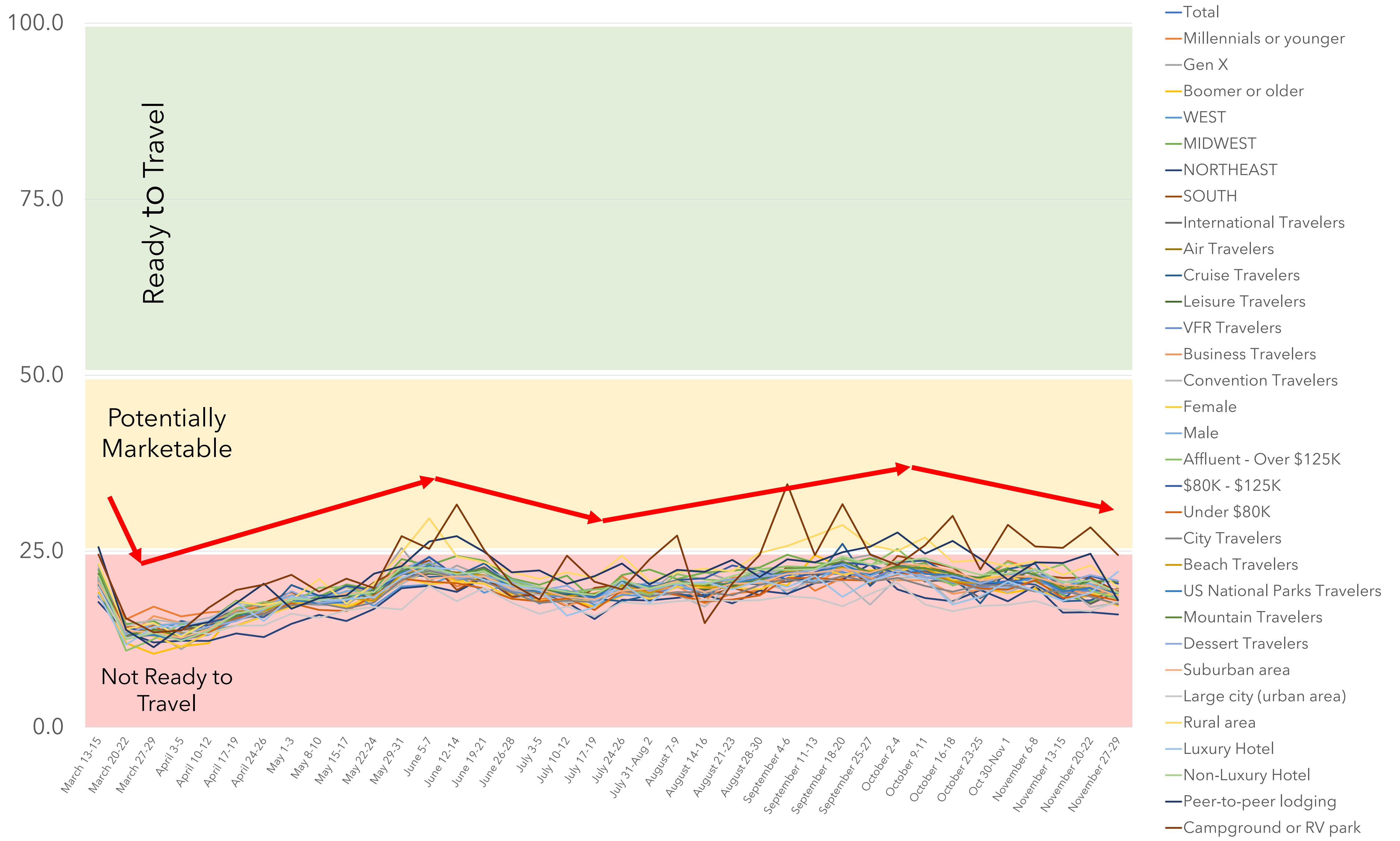
Measuring the Potential Influence of Travel Marketing

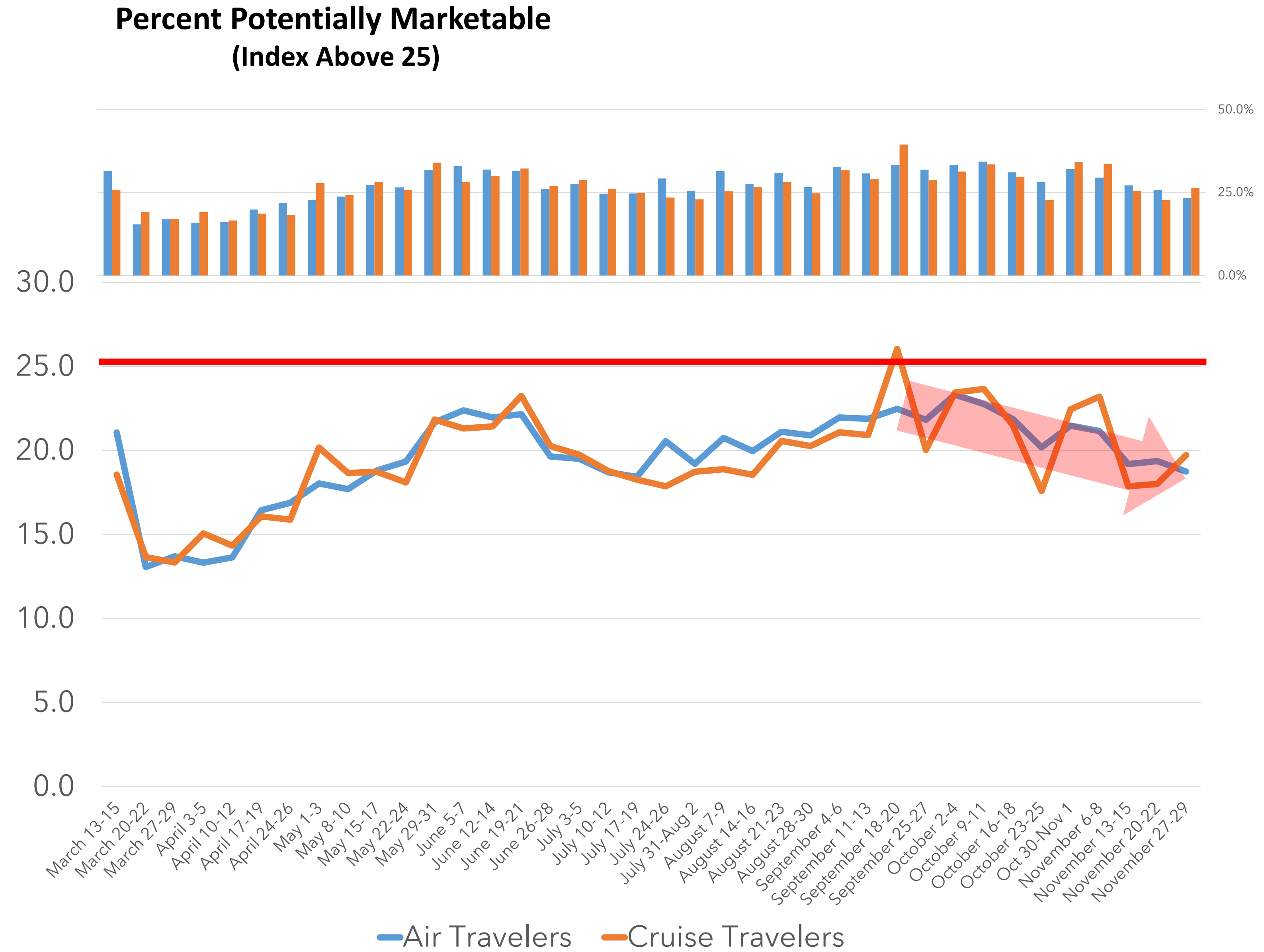
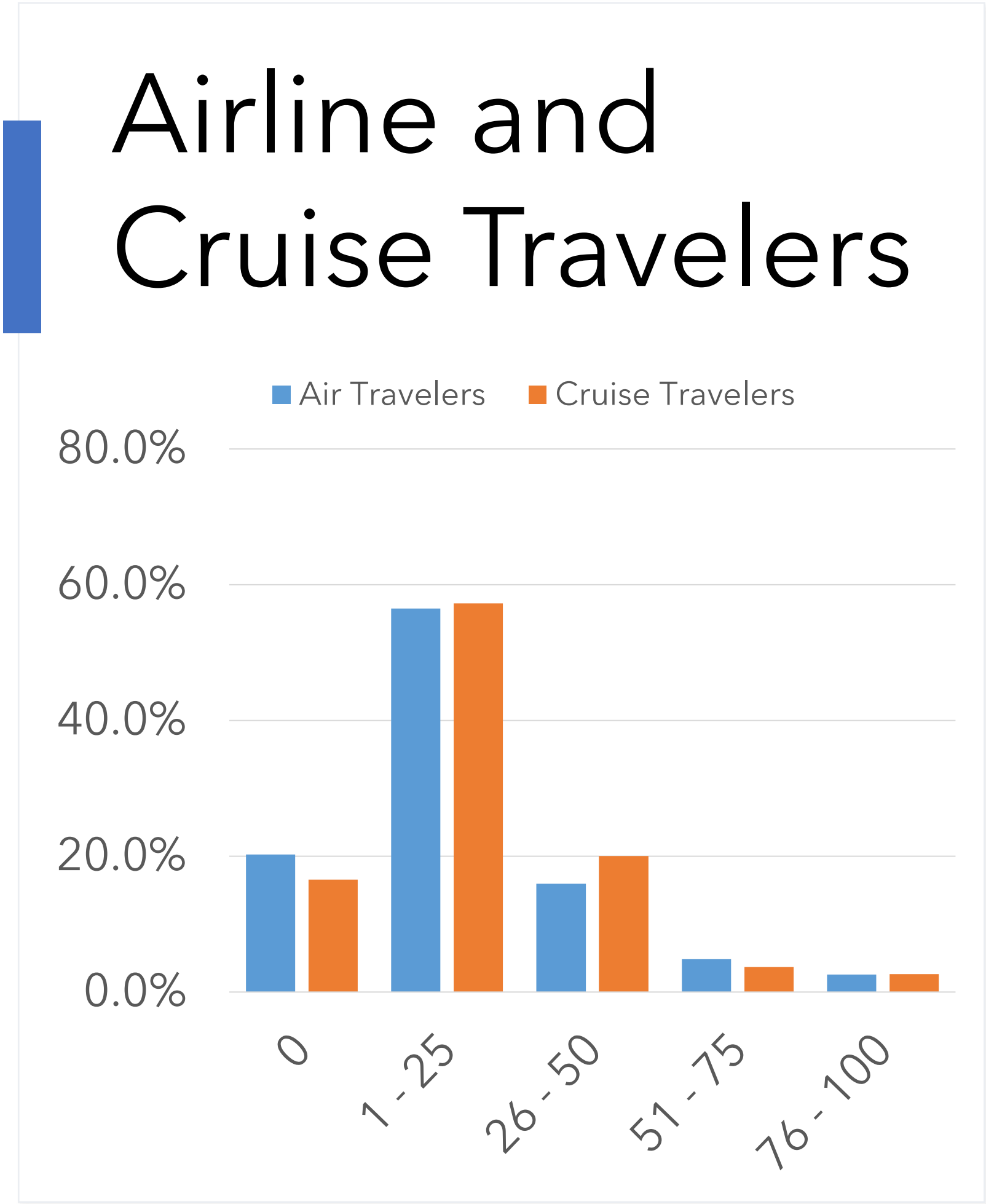
Highlights from the Week of November 30th

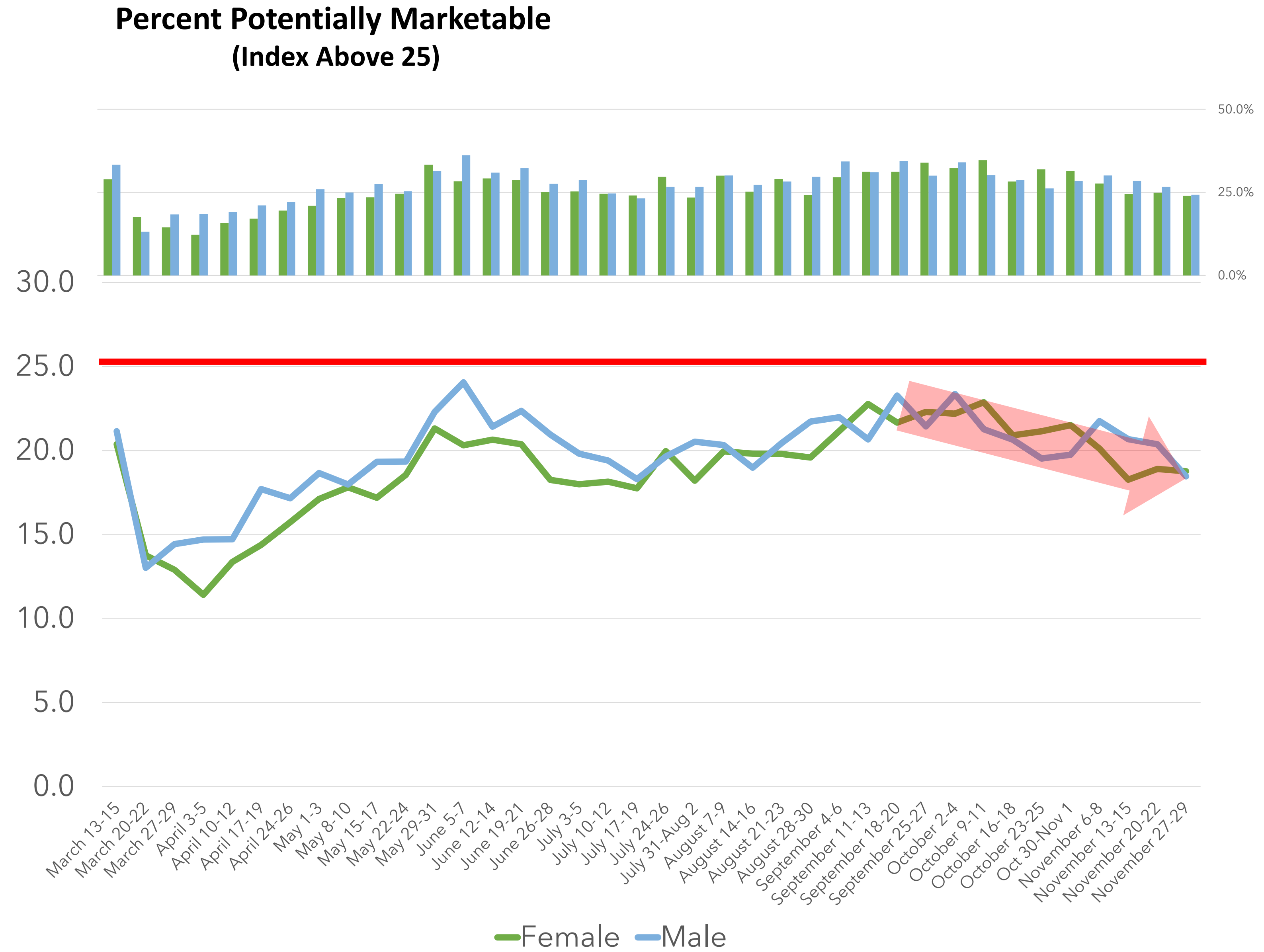
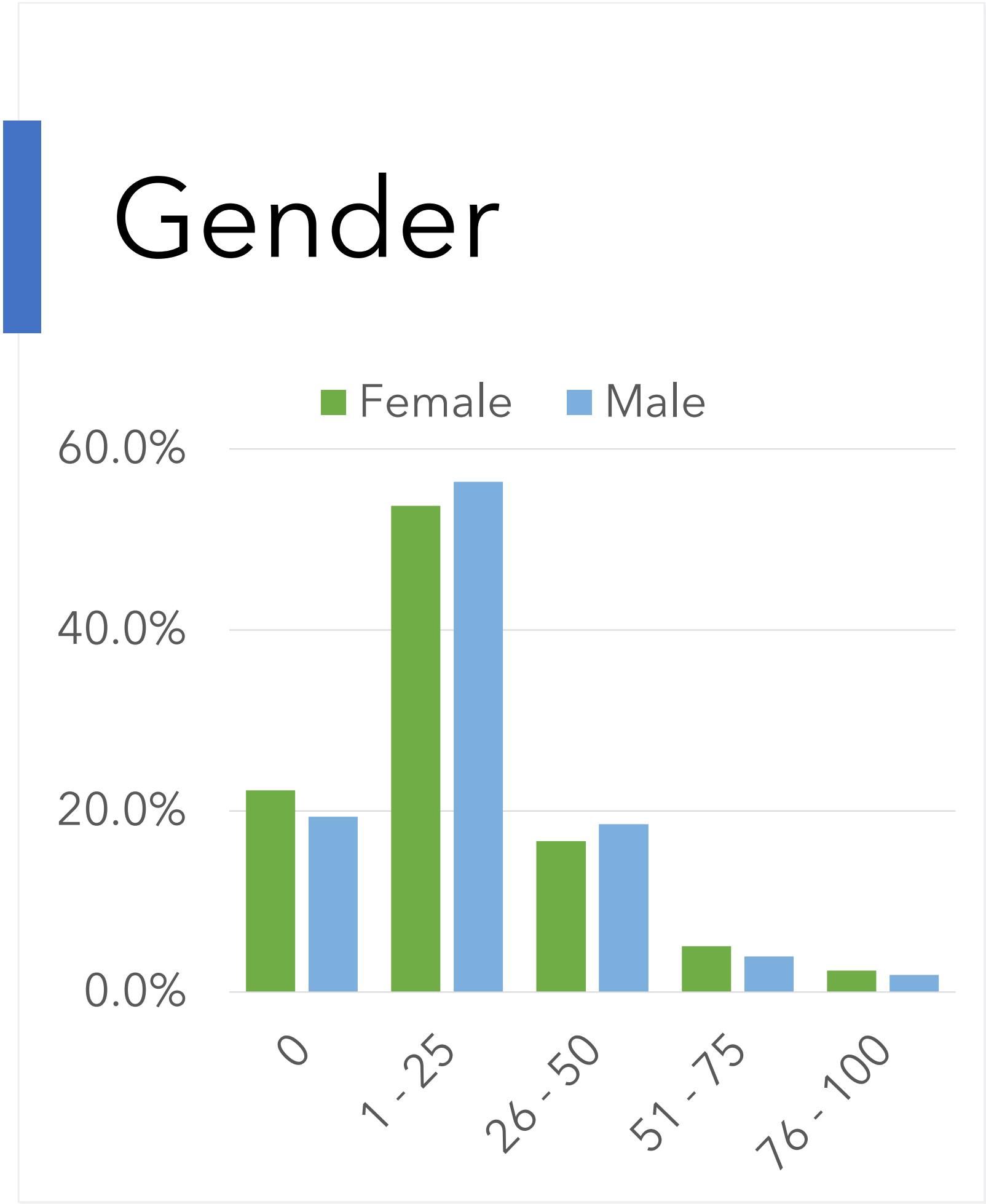
Predictive Index Formula



*Normalized to a 100pt scale

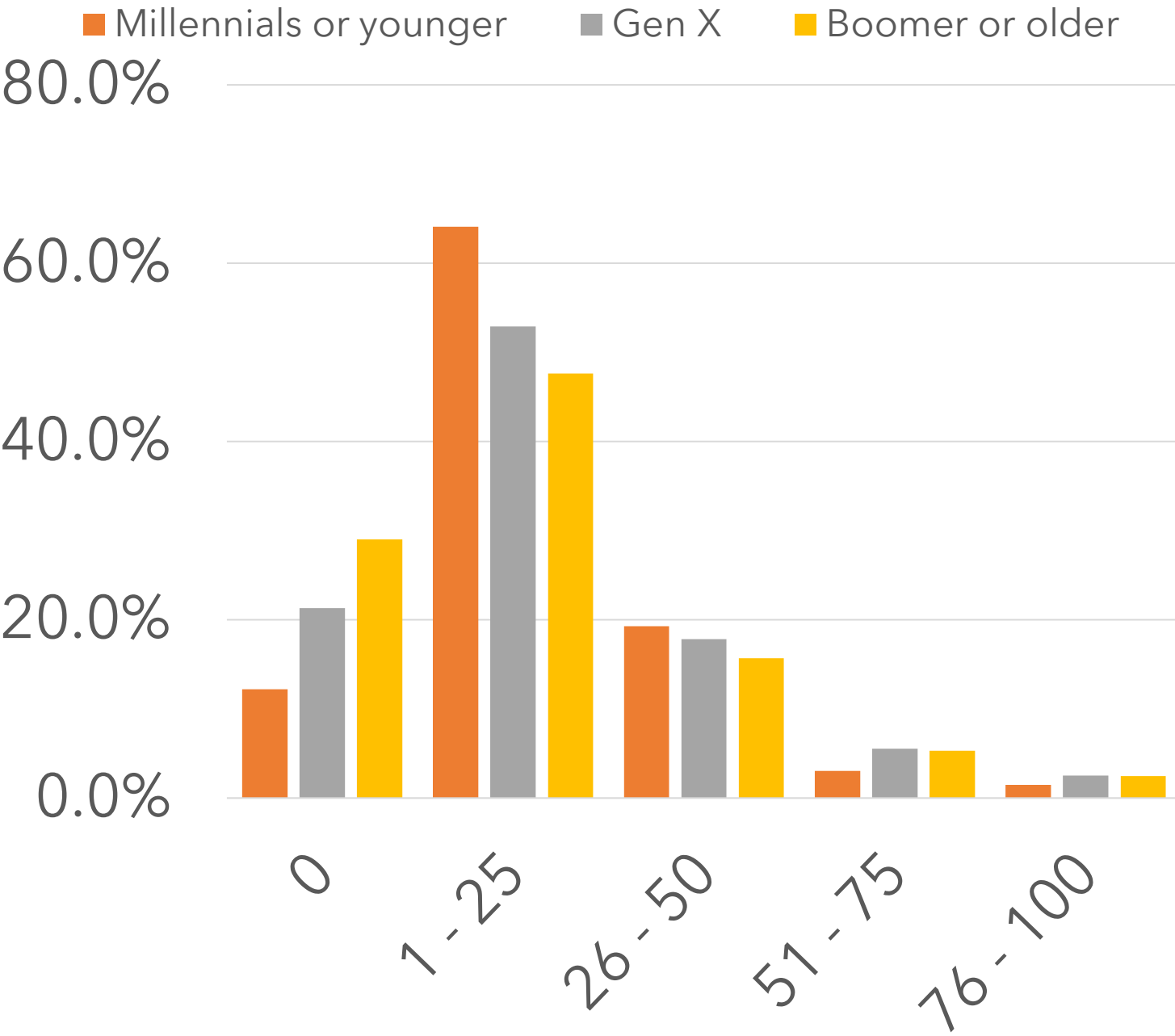




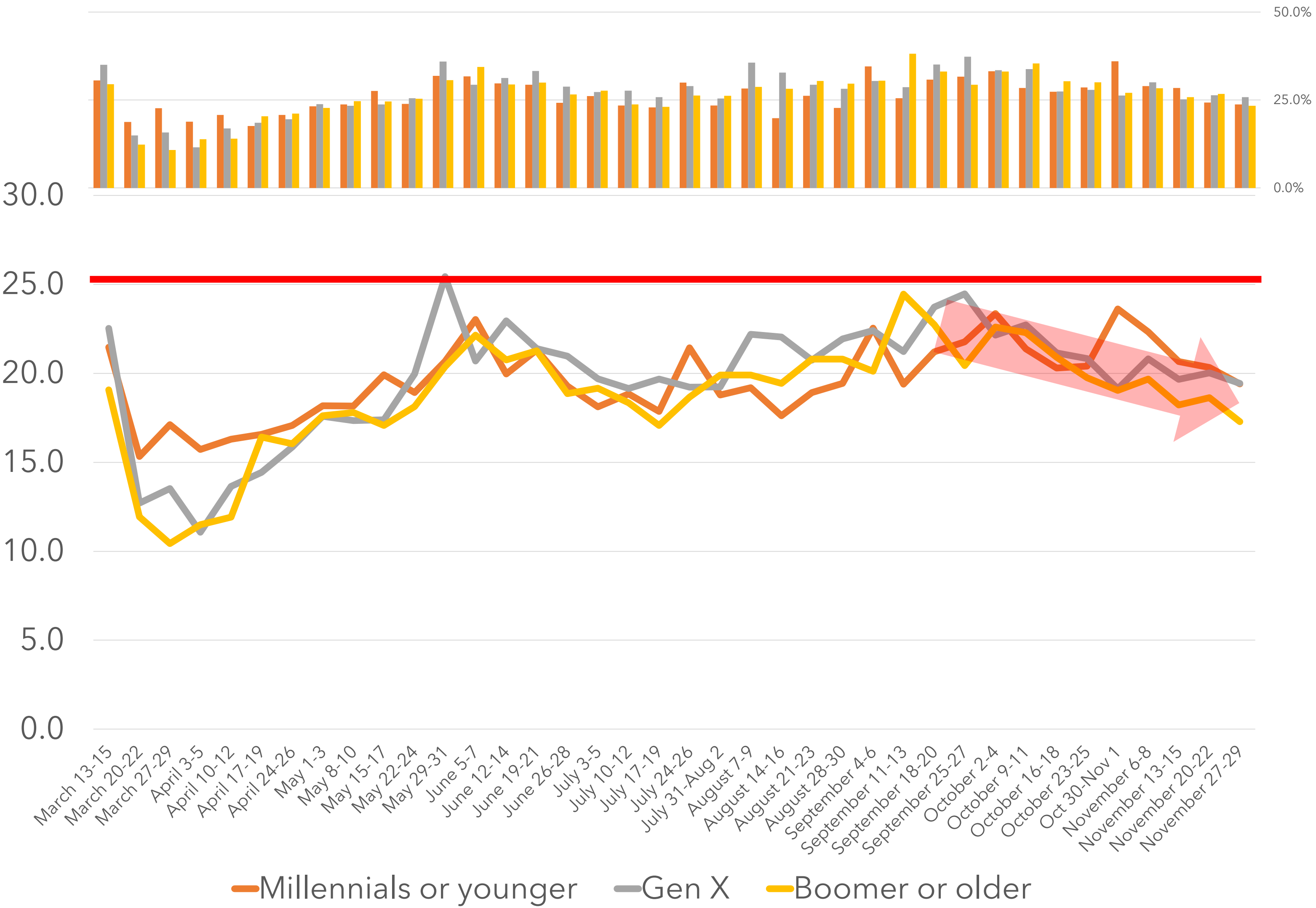


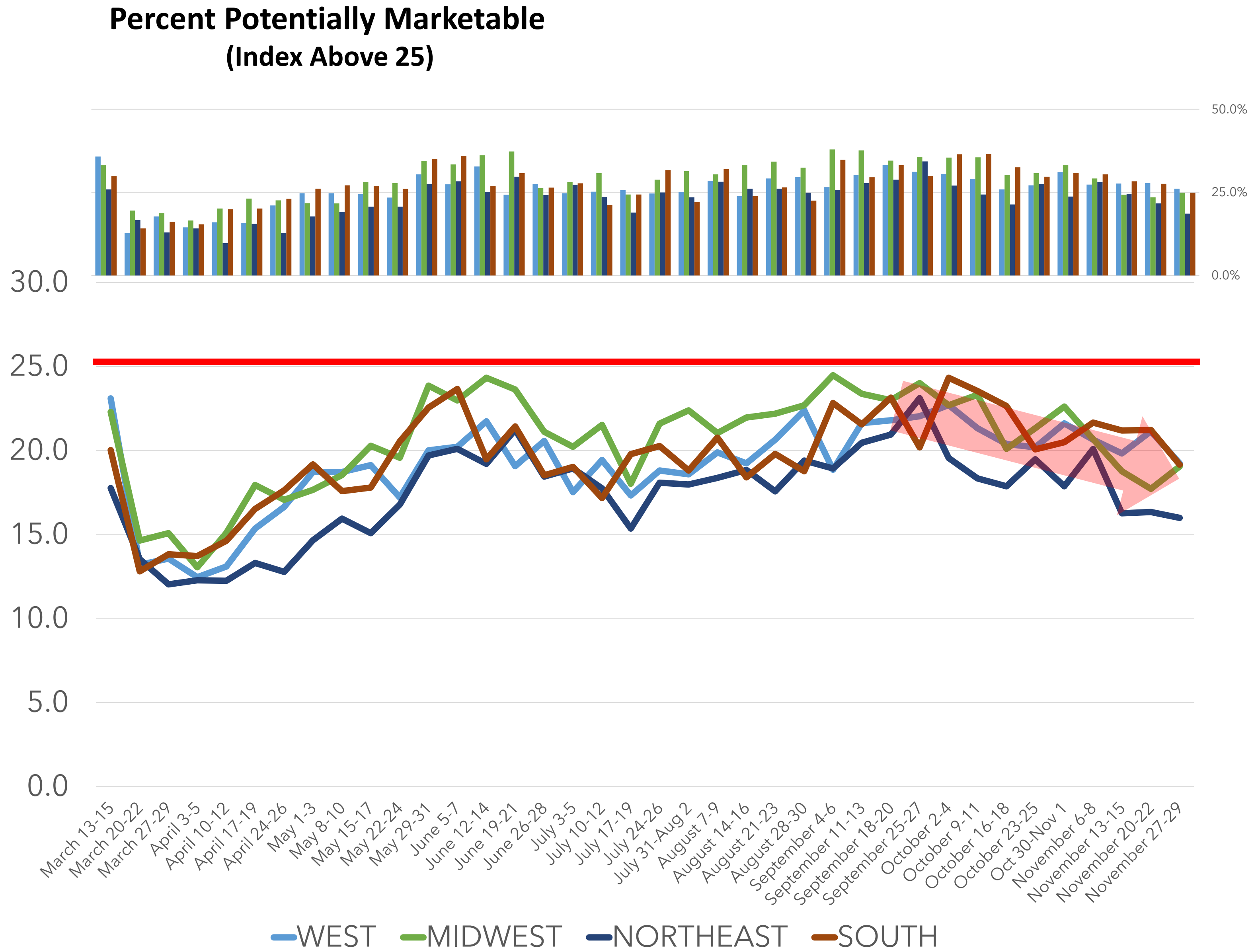
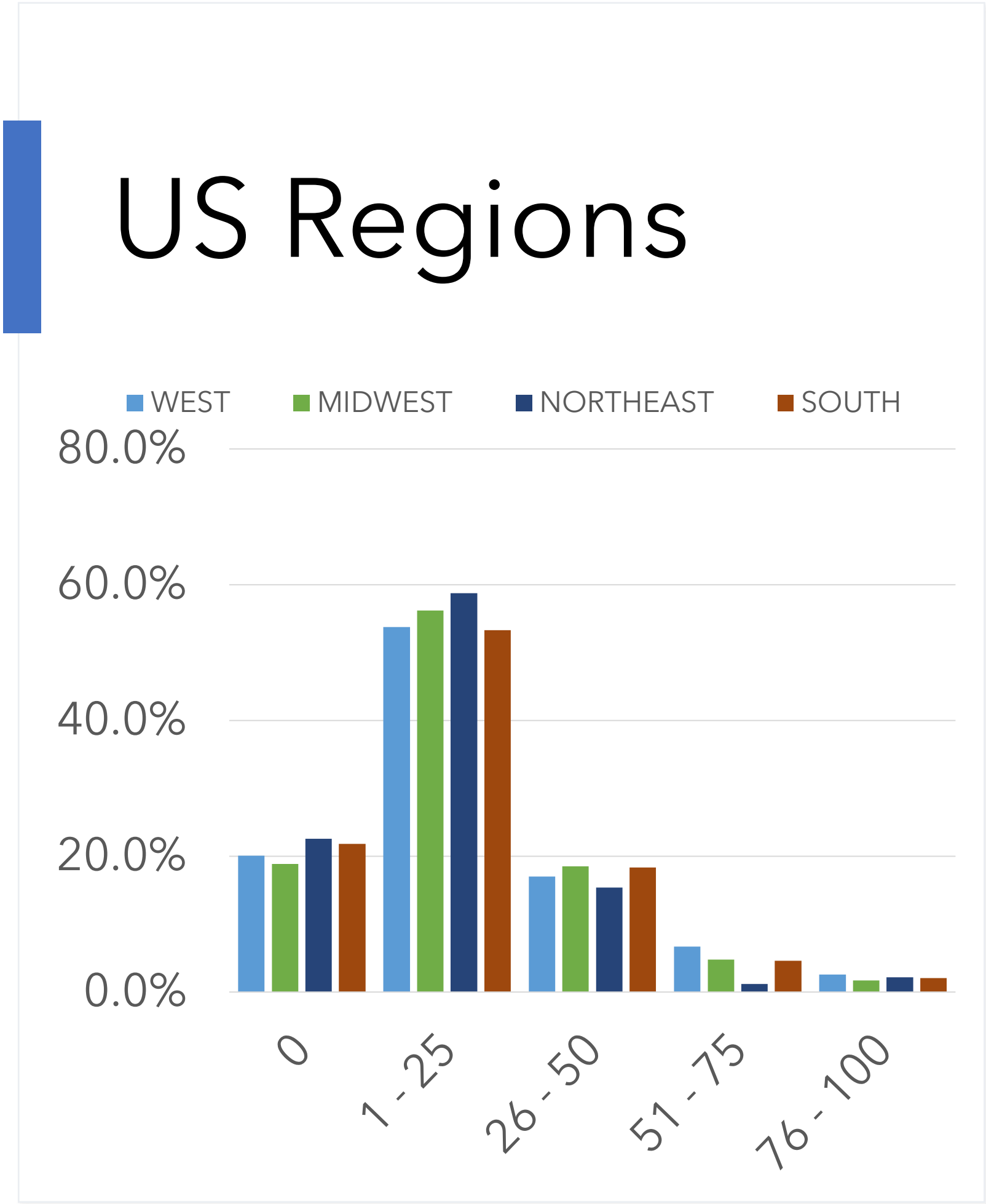


Generation



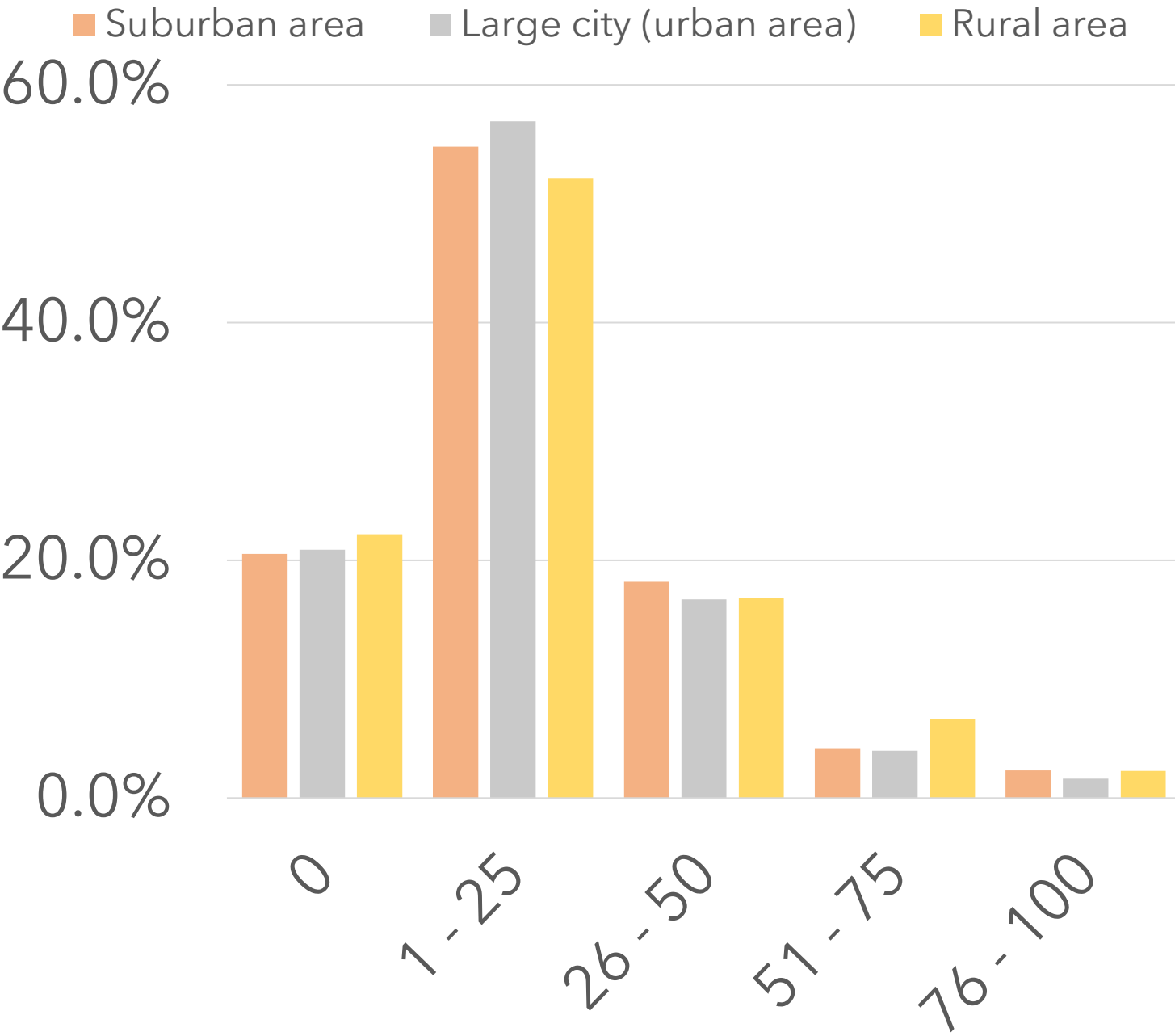
Percent Potentially Marketable (Index Above 25)



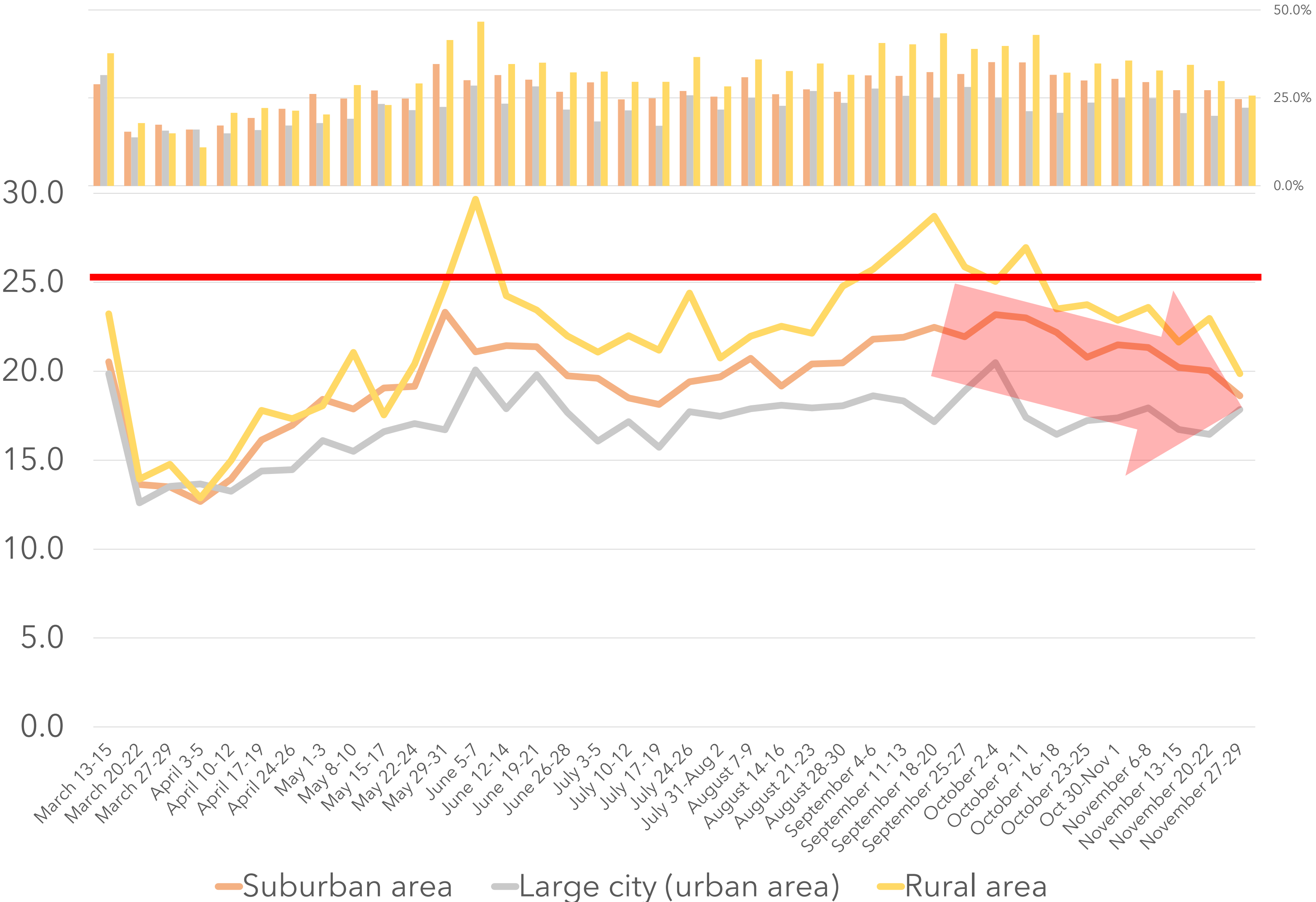




Residence Type



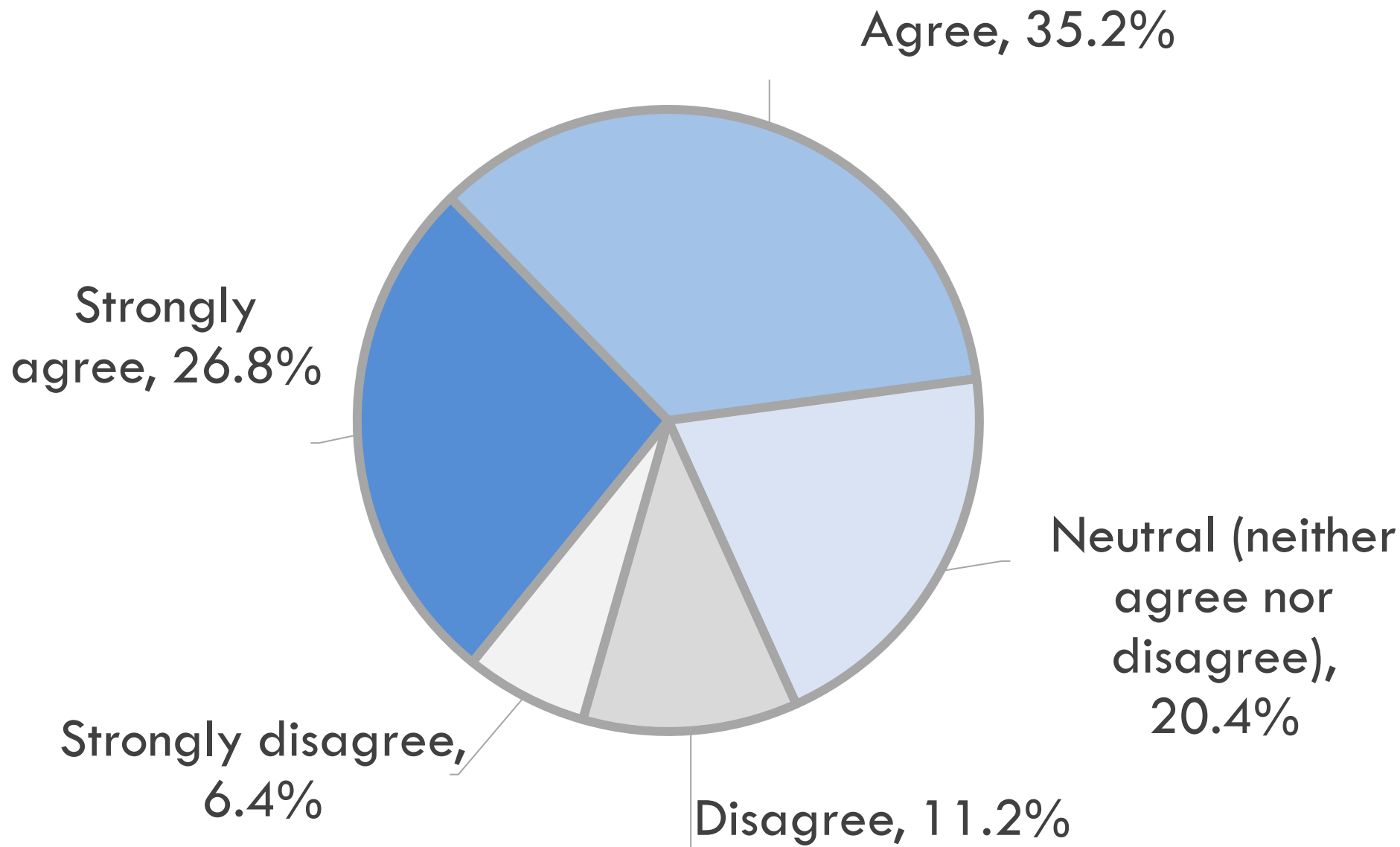
Percent Potentially Marketable (Index Above 25)



INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

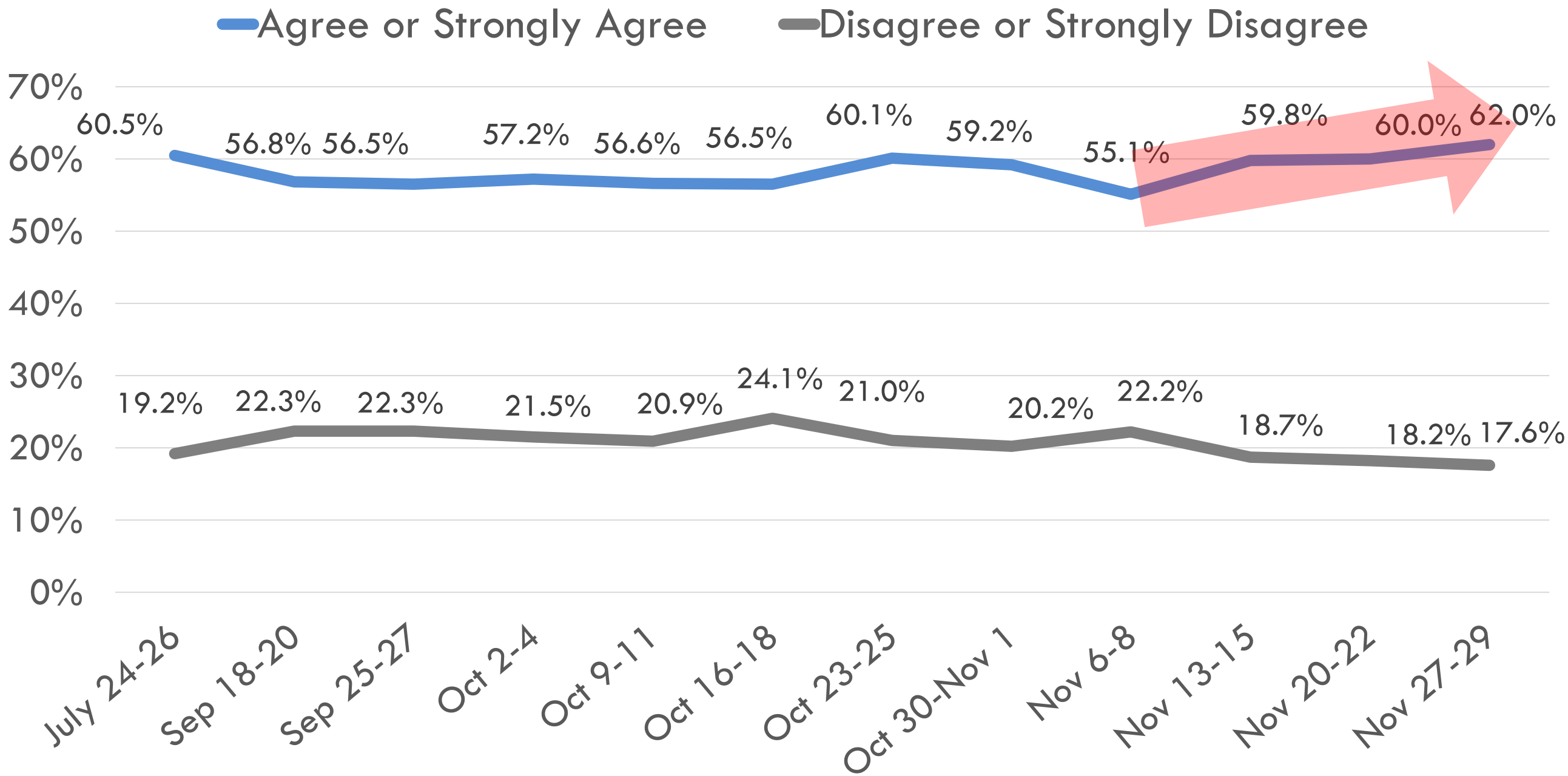
How much do you agree with the following statement?

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



(Base: Waves 20, 28-38 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 completed surveys.

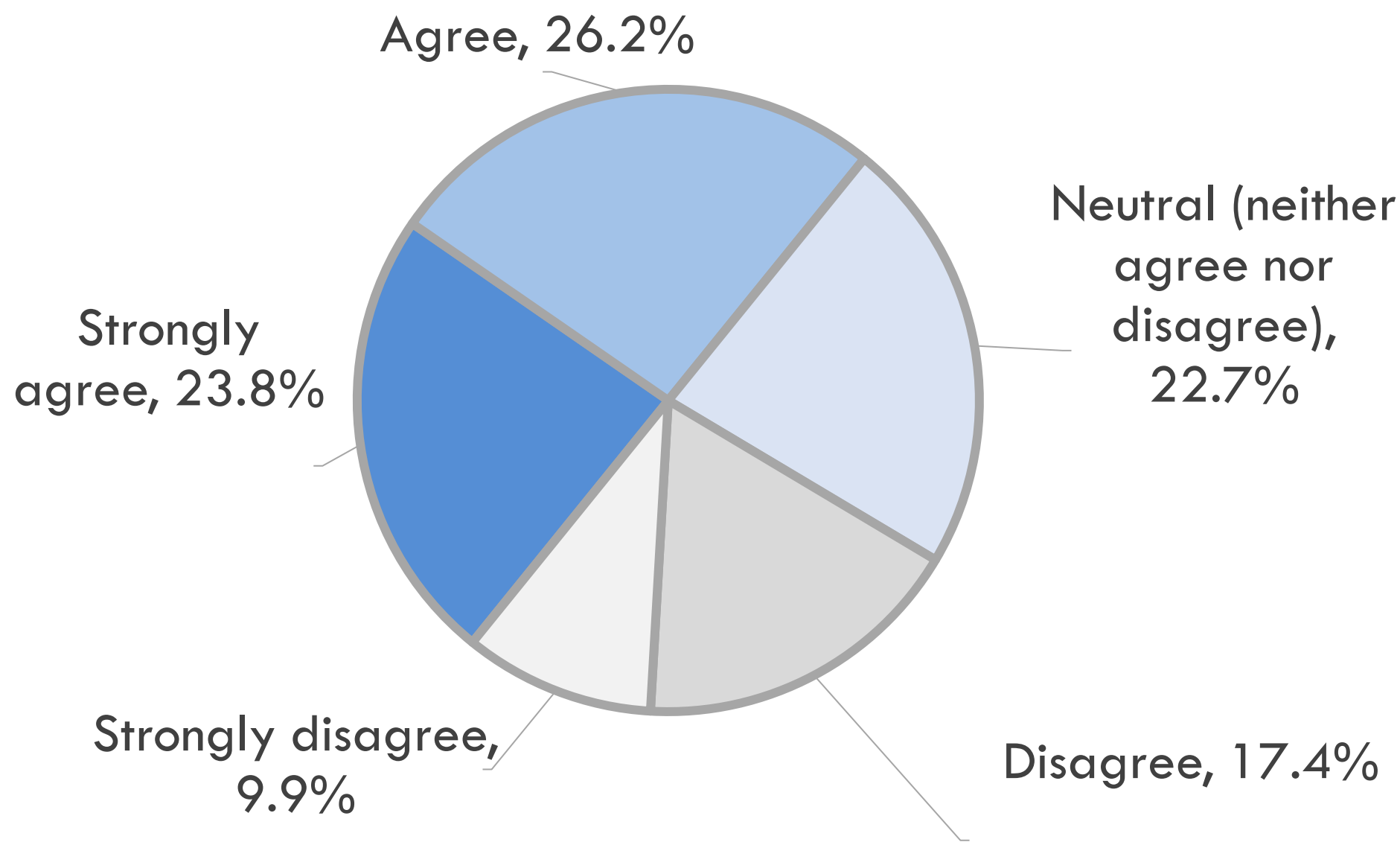
Historical data



LOSS OF INTEREST IN TRAVEL

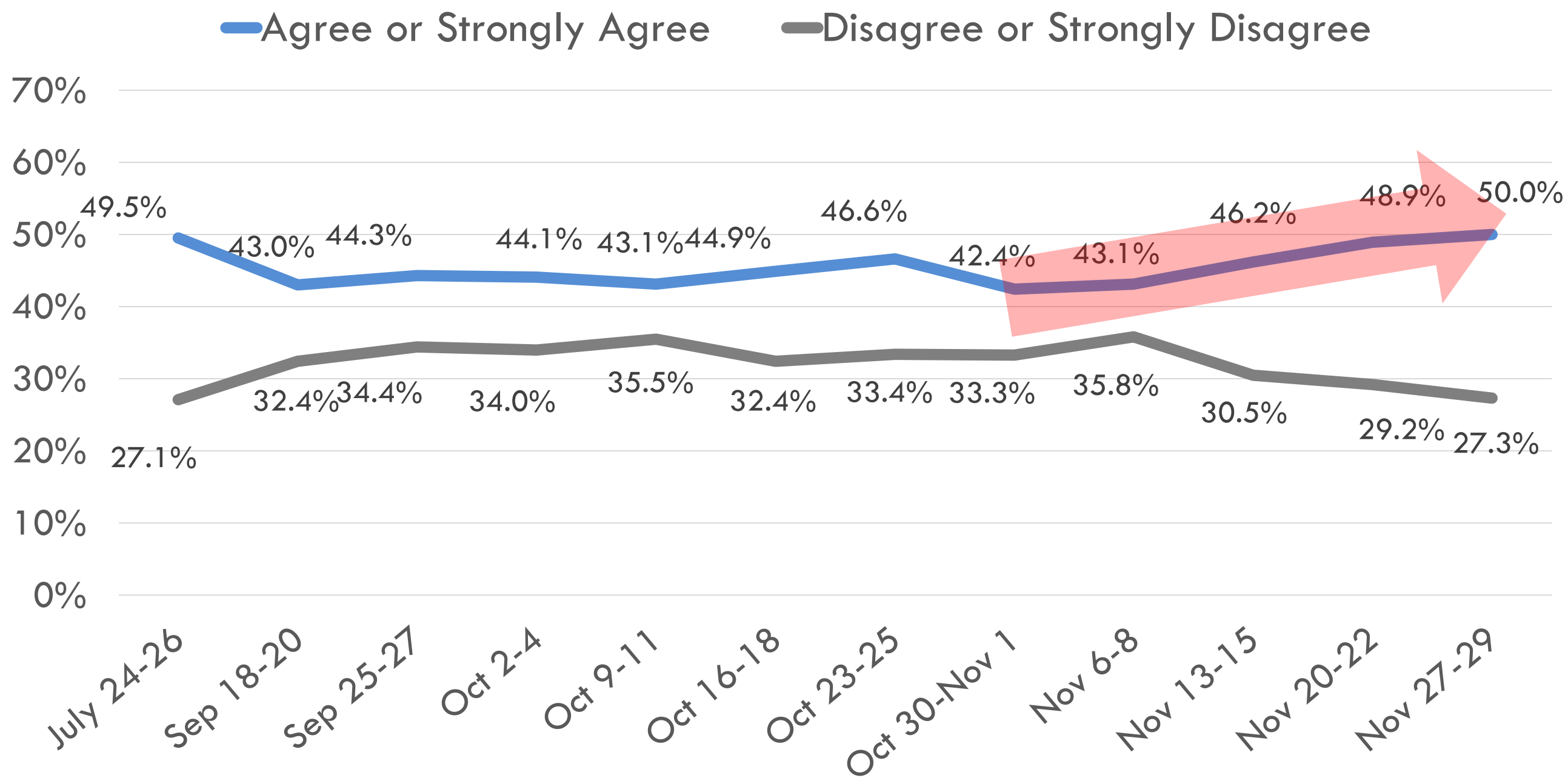
How much do you agree with the following statement?

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



(Base: Waves 20, 28-38 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 completed surveys.

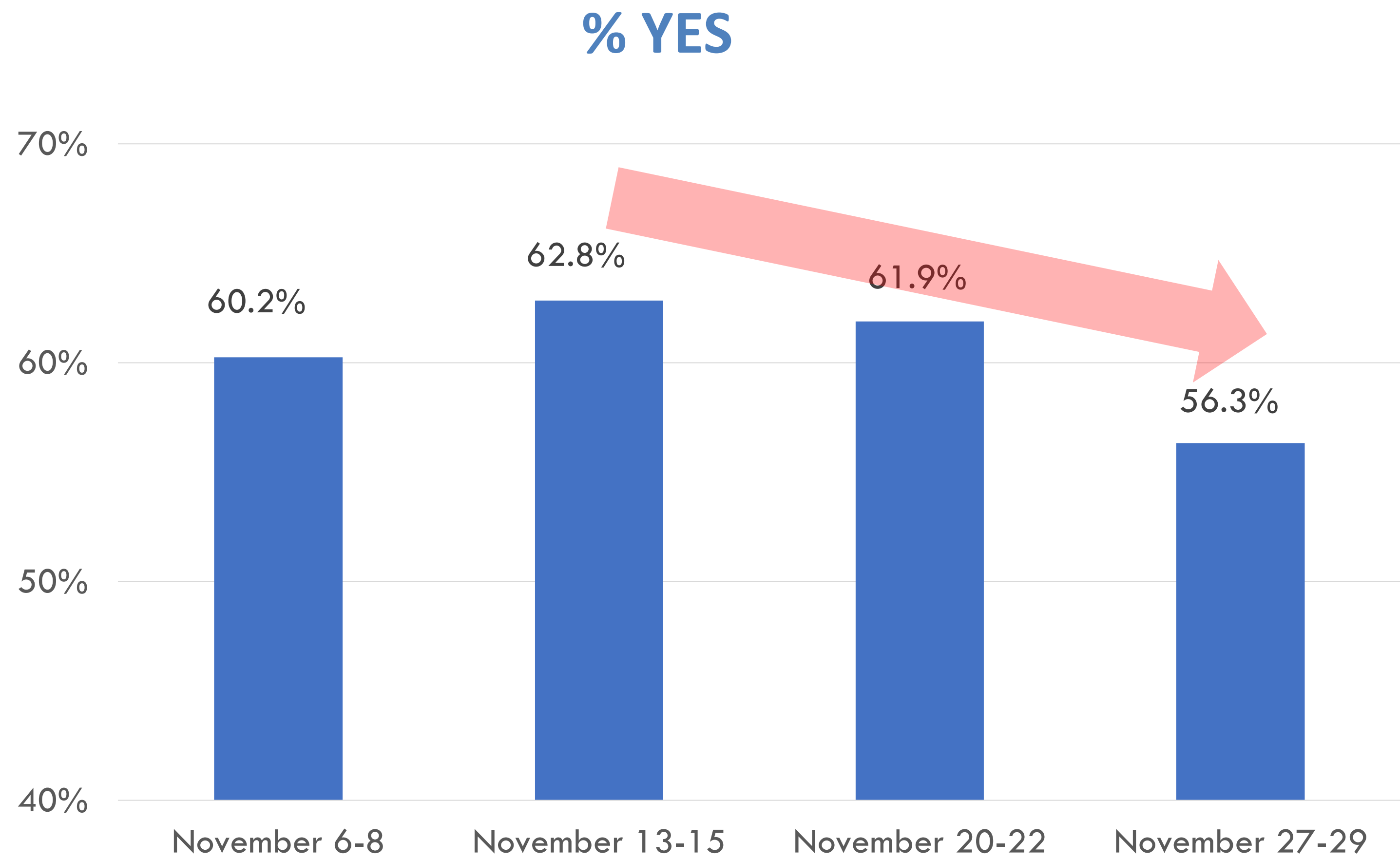
Historical data



RISING COVID-19 CASES IMPACT ON LIKELIHOOD OF FUTURE TRAVEL

Question: Have recent increases in COVID-19 cases around the country made you **LESS LIKELY** to travel in the next **THREE (3) MONTHS**?

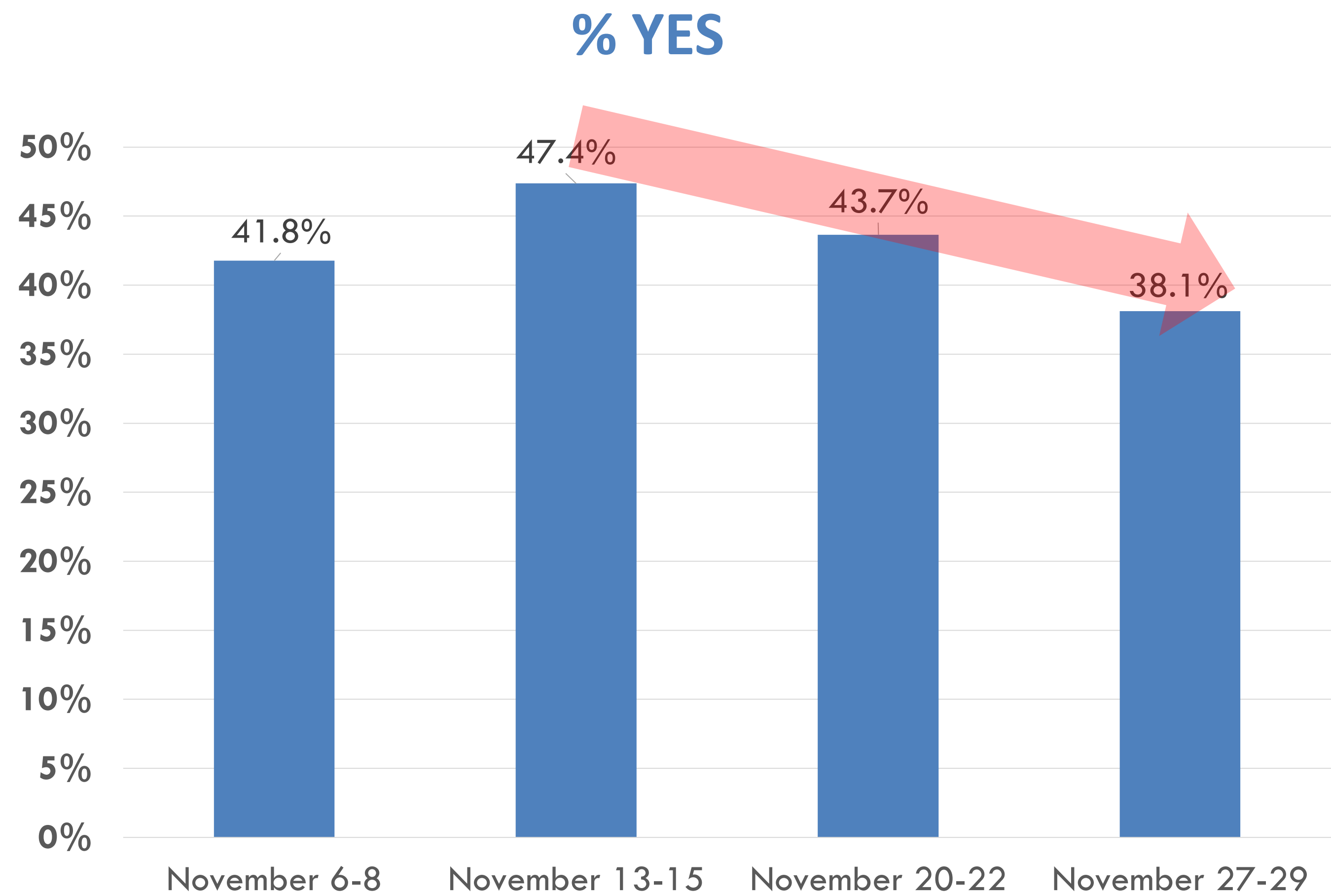
(Base: Wave 35-38 data. All respondents, 1,205, 1,206, 1,205 and 1,205 completed surveys.)



CANCELLATIONS/POSTPONEMENTS DUE TO RISING COVID CASES

Question: Have you cancelled or postponed any upcoming leisure trips because of the recent increases in COVID-19 cases seen around the United States?

(Base: Wave 35-38 data. All respondents, 1,205, 1,206, 1,205 and 1,205 completed surveys.)





Travelers
Behaving Badly
(& Media Coverage
of Them)

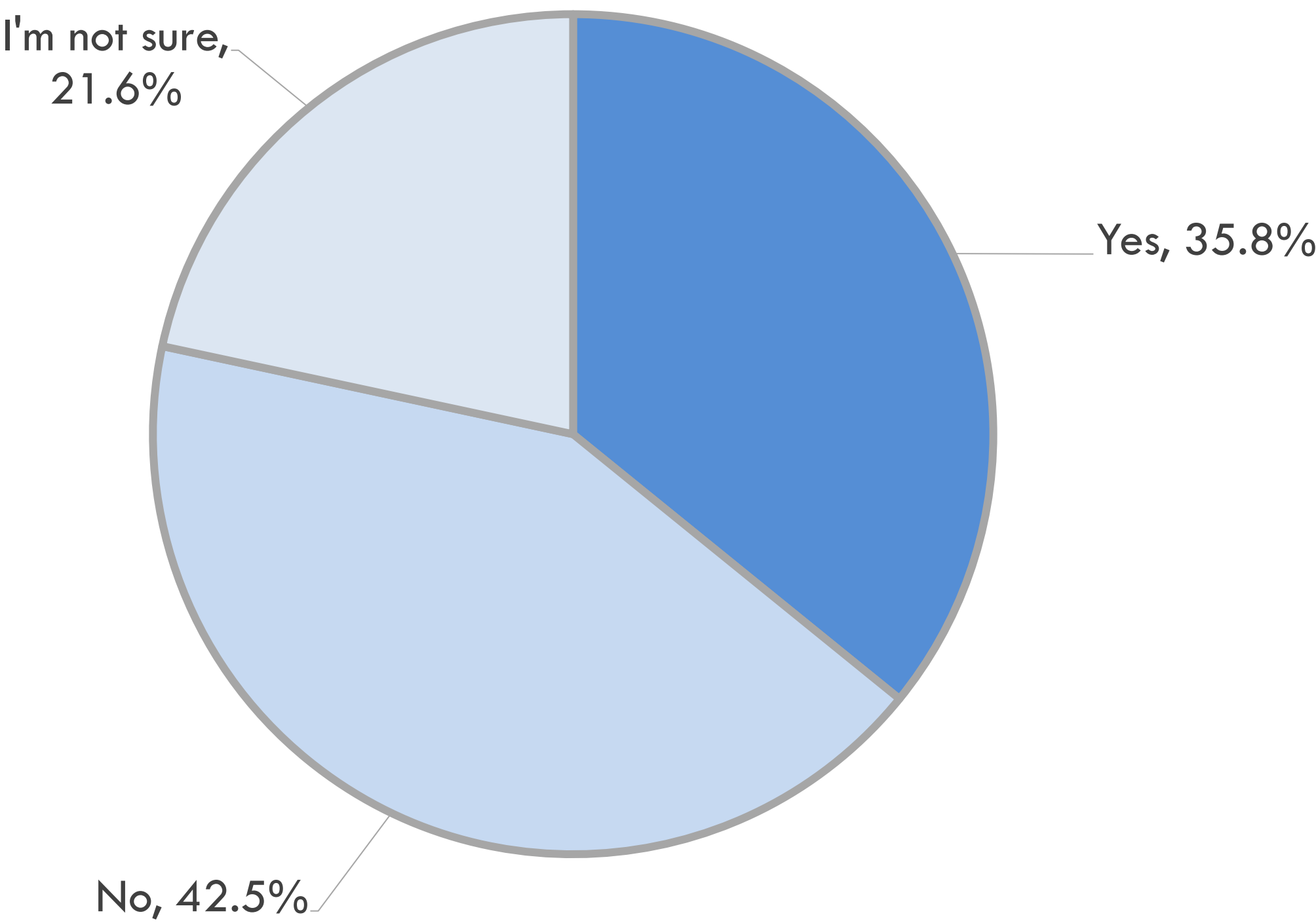


COVID-19 RELATED DESTINATION MEDIA COVERAGE

Question: Please think now about COVID-19 related reports you have recently seen in the media (newspapers, magazines, television, the Internet, etc.)

In the PAST MONTH, do you recall seeing any COVID-19 related reports in the media about travel destinations where people were behaving in a manner that would MAKE YOU FEEL UNCOMFORTABLE VISITING?

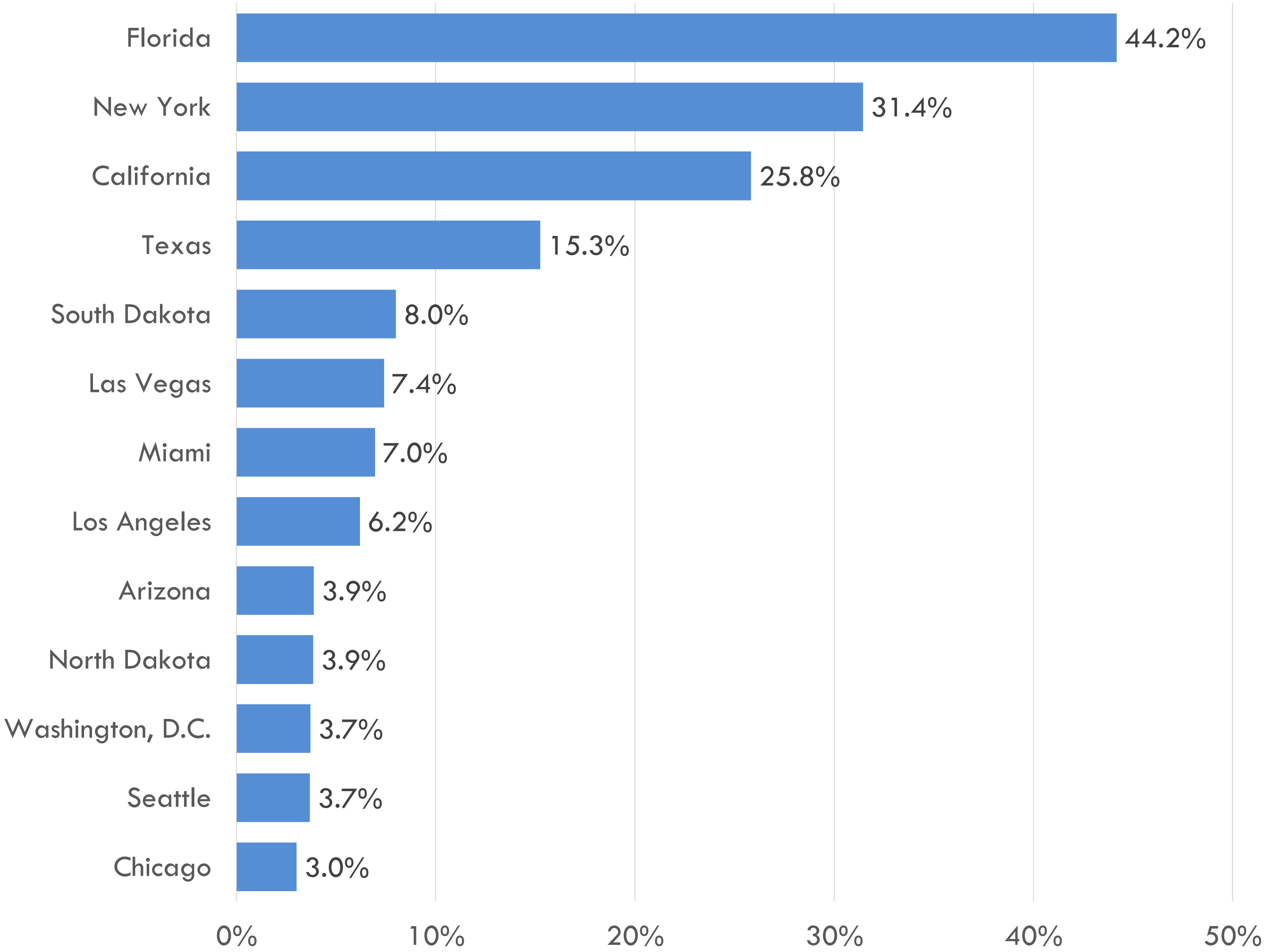
(Base: Wave 38 data. All respondents, 1,196 completed surveys. Data collected Nov 27-29, 2020)



DESTINATIONS WITH NEGATIVE COVID-19 MEDIA COVERAGE

Question: Which specific travel destinations were these reports about? (Write in as many as THREE) (OPEN-ENDED QUESTION)

(Base: Wave 38 data. Respondents who recall COVID-19 related reports in the media about travel destinations, 449 completed surveys. Data collected Nov 27-29, 2020)

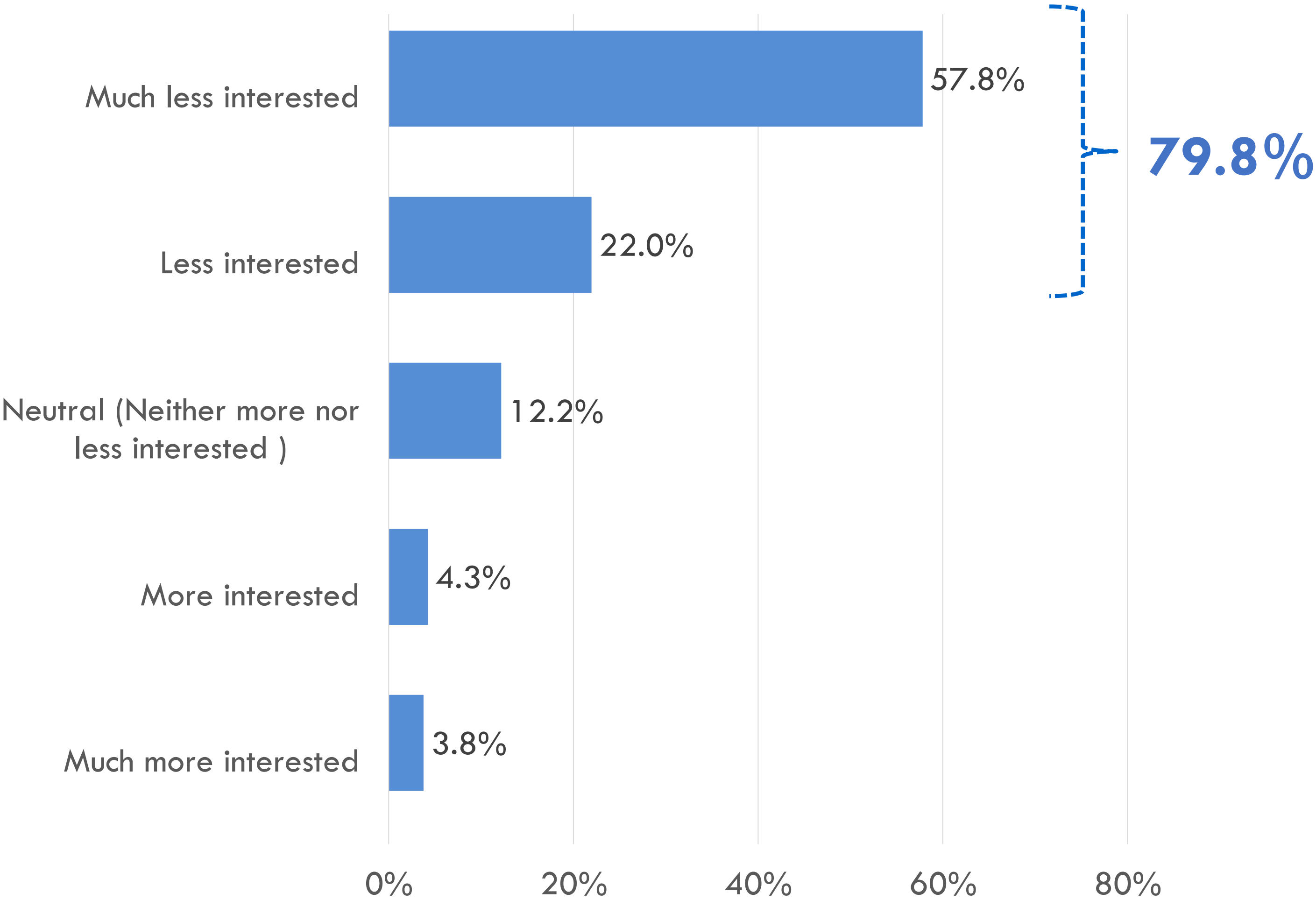


EFFECTS OF COVID-19 MEDIA COVERAGE ON DESTINATIONS

Question: How does this media coverage make you feel about visiting these destinations in the NEXT SIX (6) MONTHS? (Select one to complete the sentence)

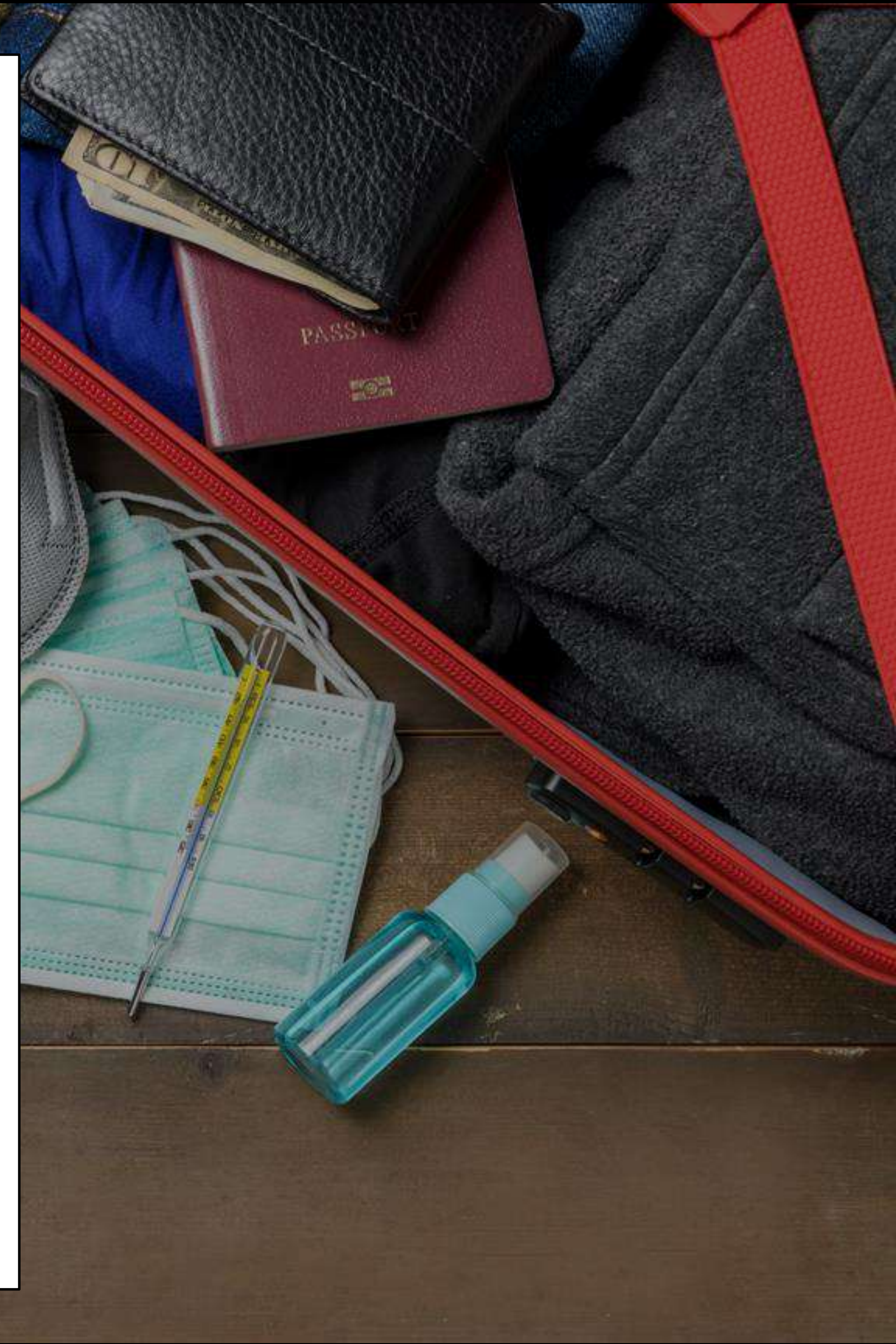
Because of the way people are behaving, I am _____ in visiting.

(Base: Wave 38 data. Respondents who recall COVID-19 related reports in the media about travel destinations, 437 completed surveys. Data collected Nov 27-29, 2020)



KEY TAKEAWAYS

1. Anxieties about personally or loved ones' contracting the virus and the pandemic's impact on personal and national economics are in an elevated but stable period.
2. Americans' openness to travel inspiration has been on a steady decline since October 18th and fully half of American travelers say they have lost their interest in traveling for the time being.
3. However, those saying they are less likely to travel in the next 3 months has declined, as have the percent who have cancelled or postponed trips due to the recent surge in infections.
4. Negative media coverage of travelers behaving poorly in certain destinations is negatively affecting American's interest in visitation in the next 6 months.



A woman with dark hair tied in a bun, wearing a white surgical mask and a white t-shirt, is looking off to the side. The background is a blurred cityscape under a blue sky.

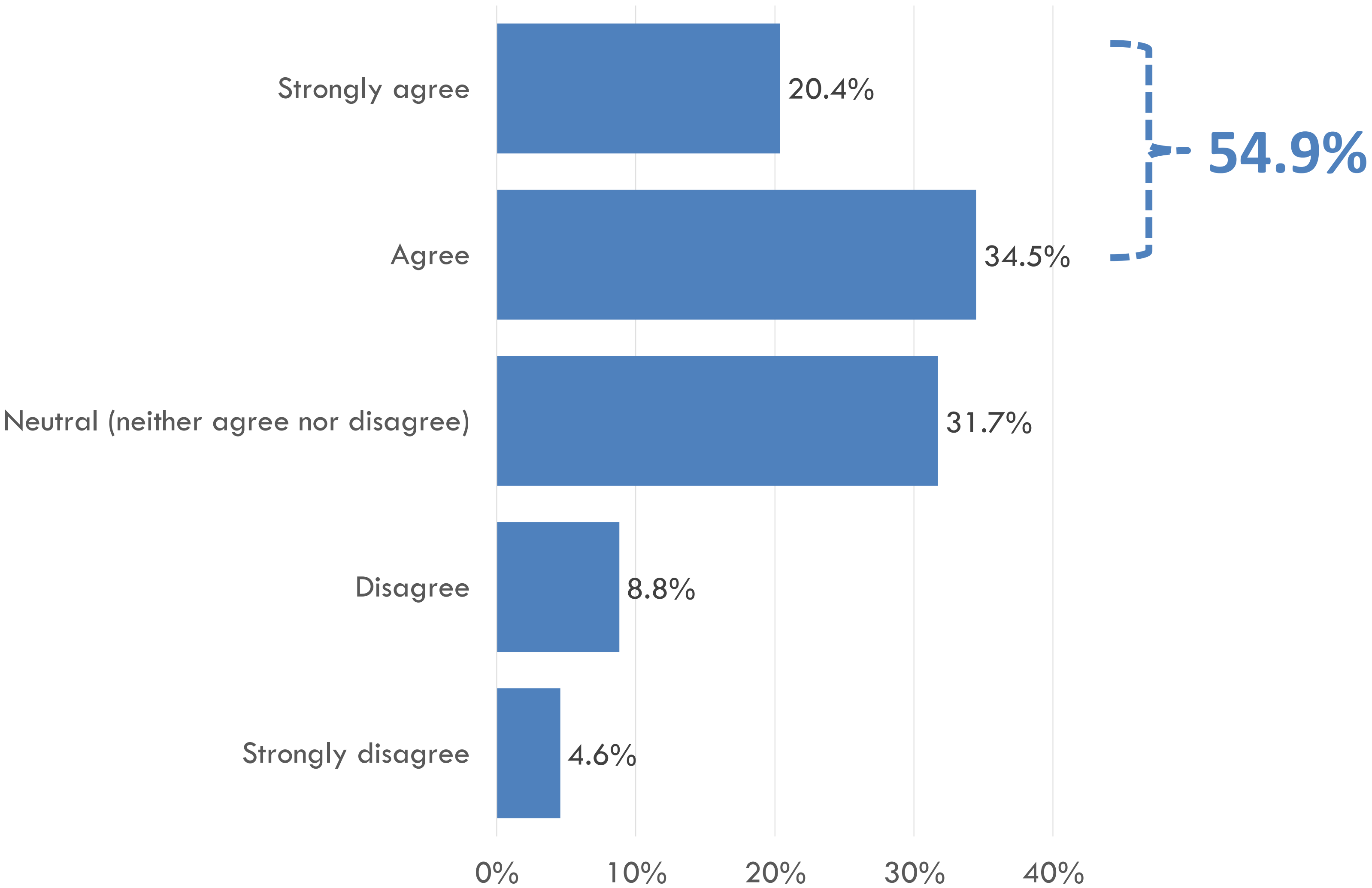
COVID-19 RESTRICTIONS

LIKELIHOOD OF ADDITIONAL RESTRICTIONS IN HOME COMMUNITY

Question: How much do you agree or disagree with the following statements?

The community where I live is **LIKELY** to implement more restrictive COVID-19 rules soon.

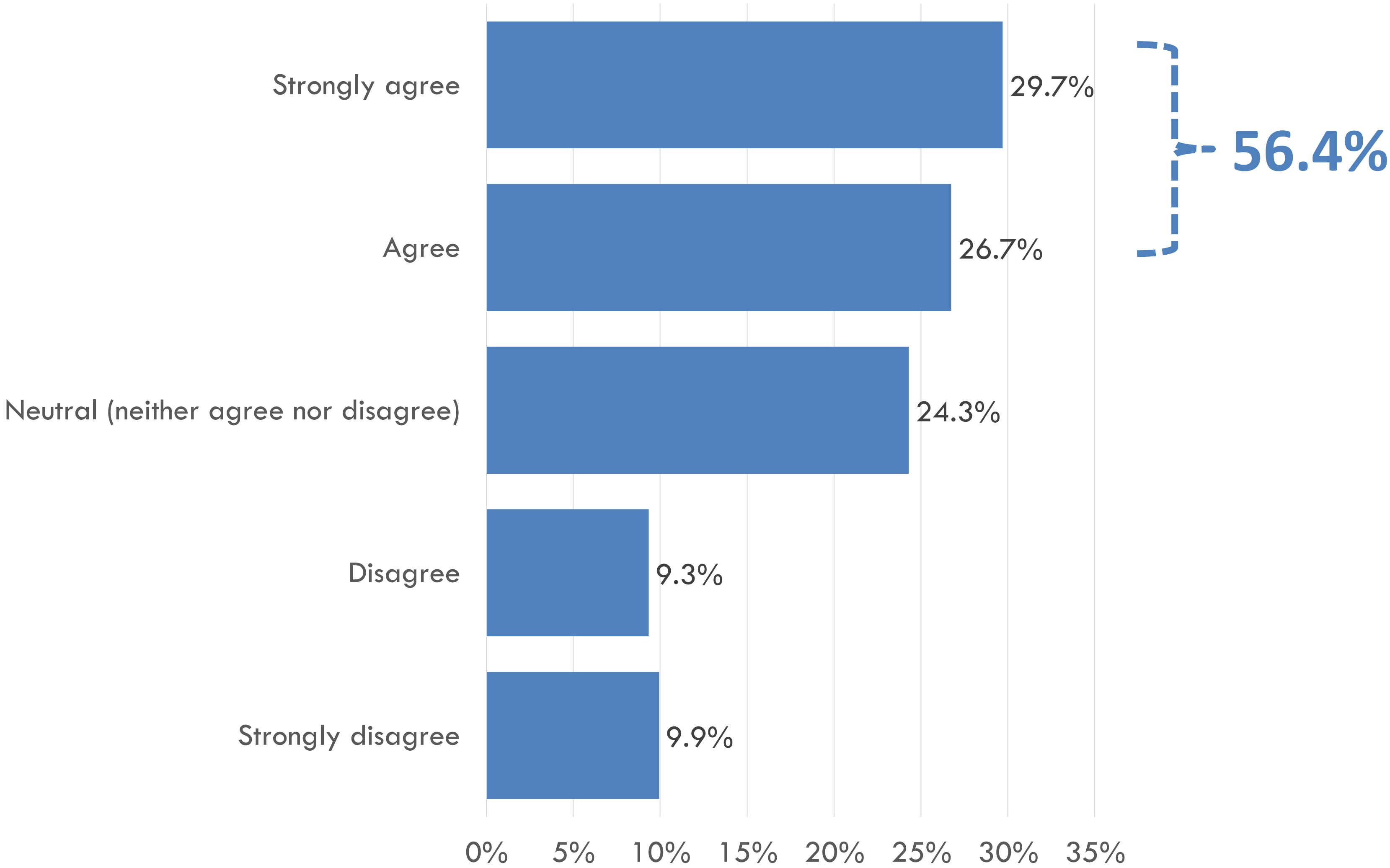
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



SUPPORT FOR RESTRICTIVE COVID-19 MEASURES

Question: I support more restrictive COVID rules being implemented in my home community.

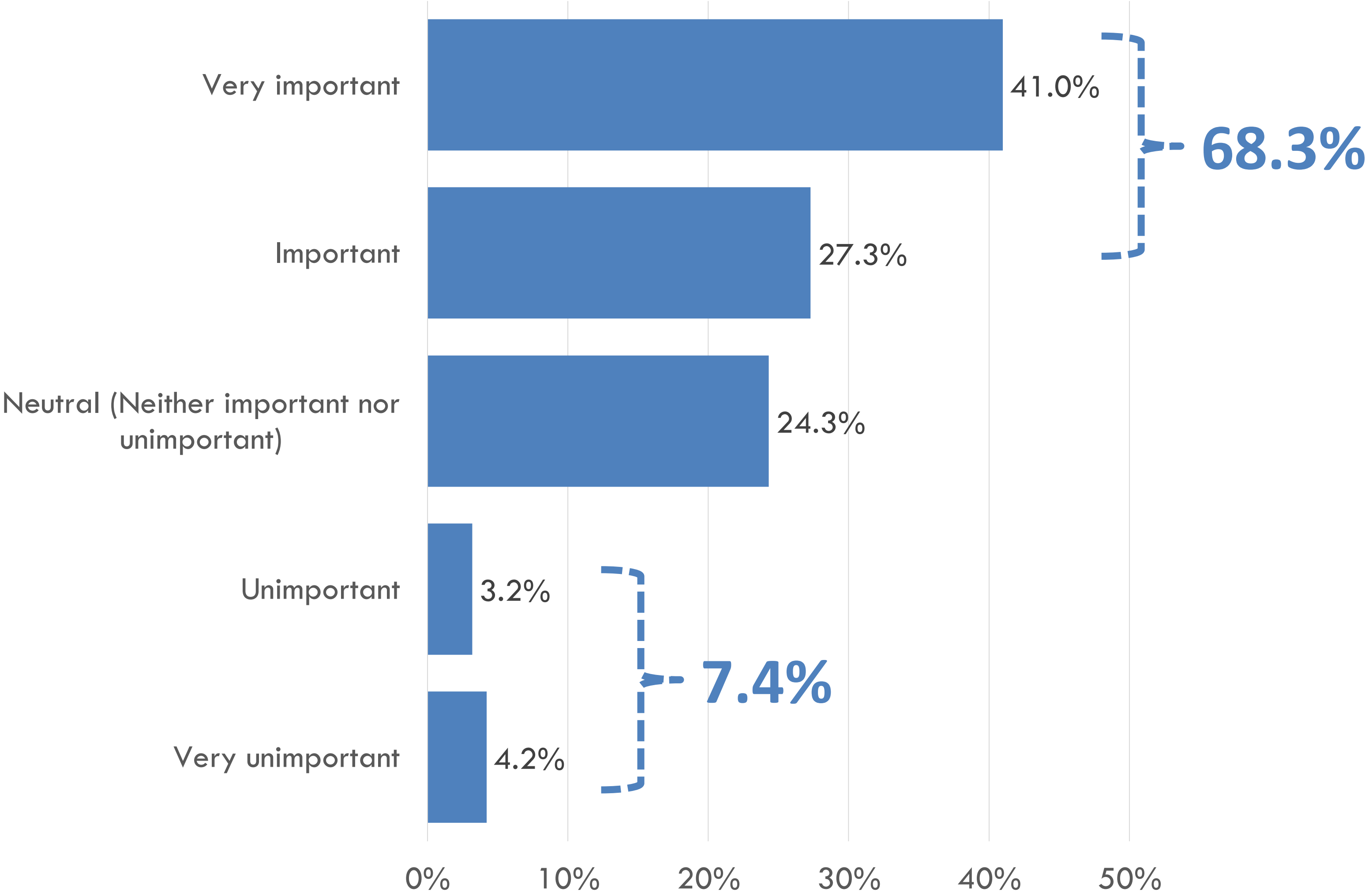
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



IMPORTANCE OF FOLLOWING STATE COVID-19 RESTRICTIONS

Question: How important do you feel it is that people follow government restrictions and recommendations related to controlling COVID-19?

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

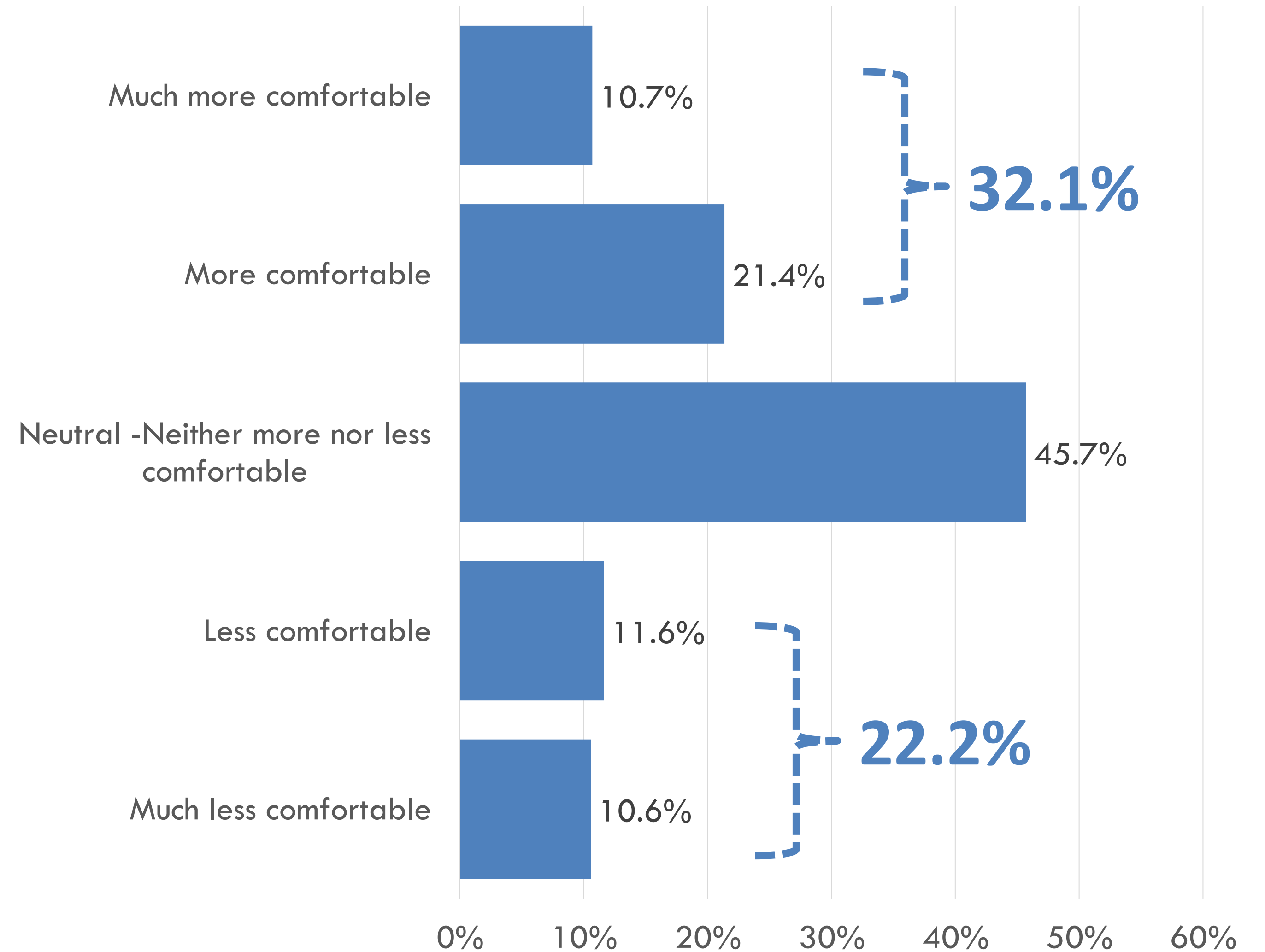


STATE REGULATIONS AND COMFORT WITH TRAVEL

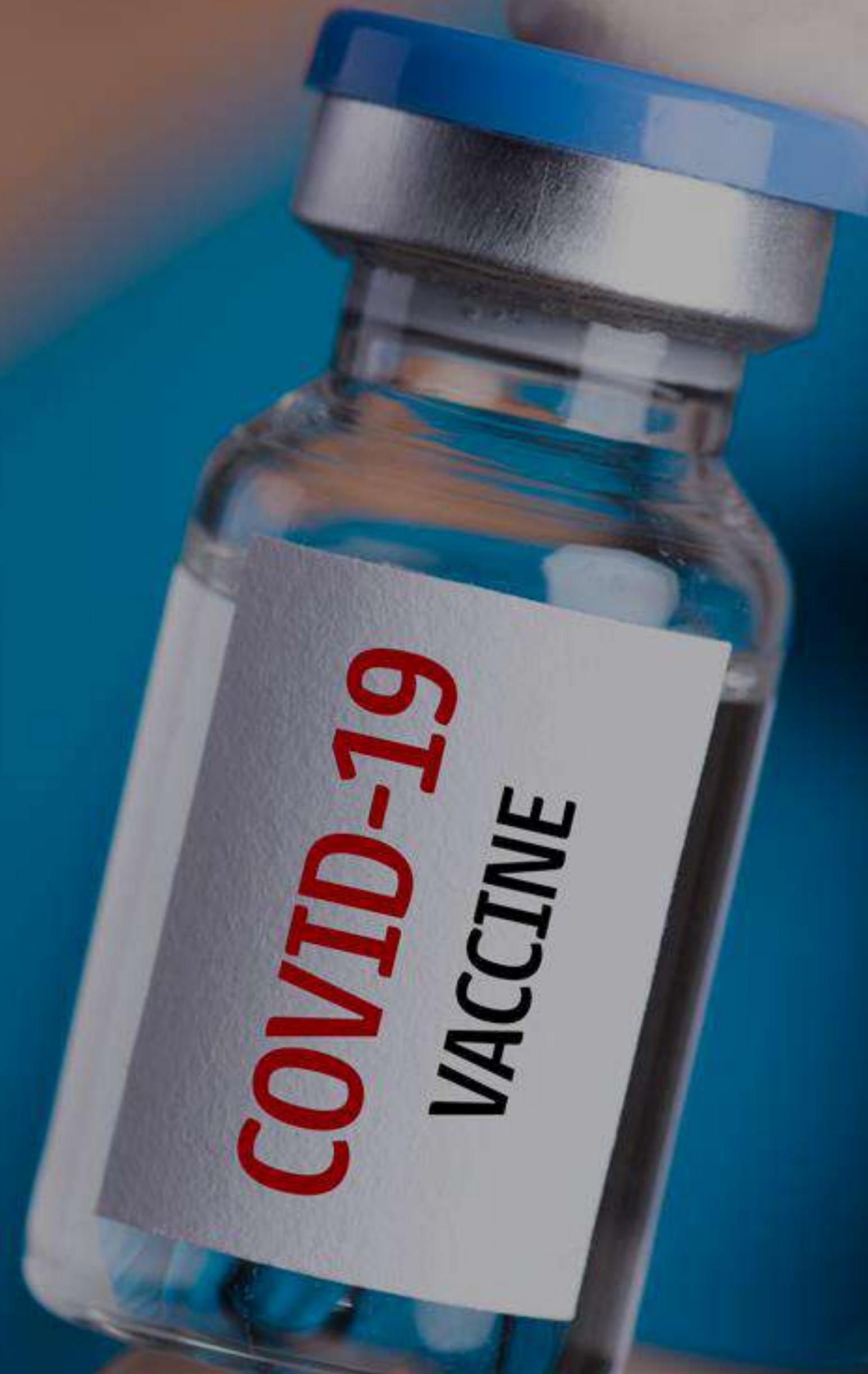
Question: If a STATE YOU WANT TO VISIT put in place (or has already put in place) such restrictions, would this make you more or less comfortable visiting that state? (Select one to fill in the blank)

I would be _____ visiting that state.

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



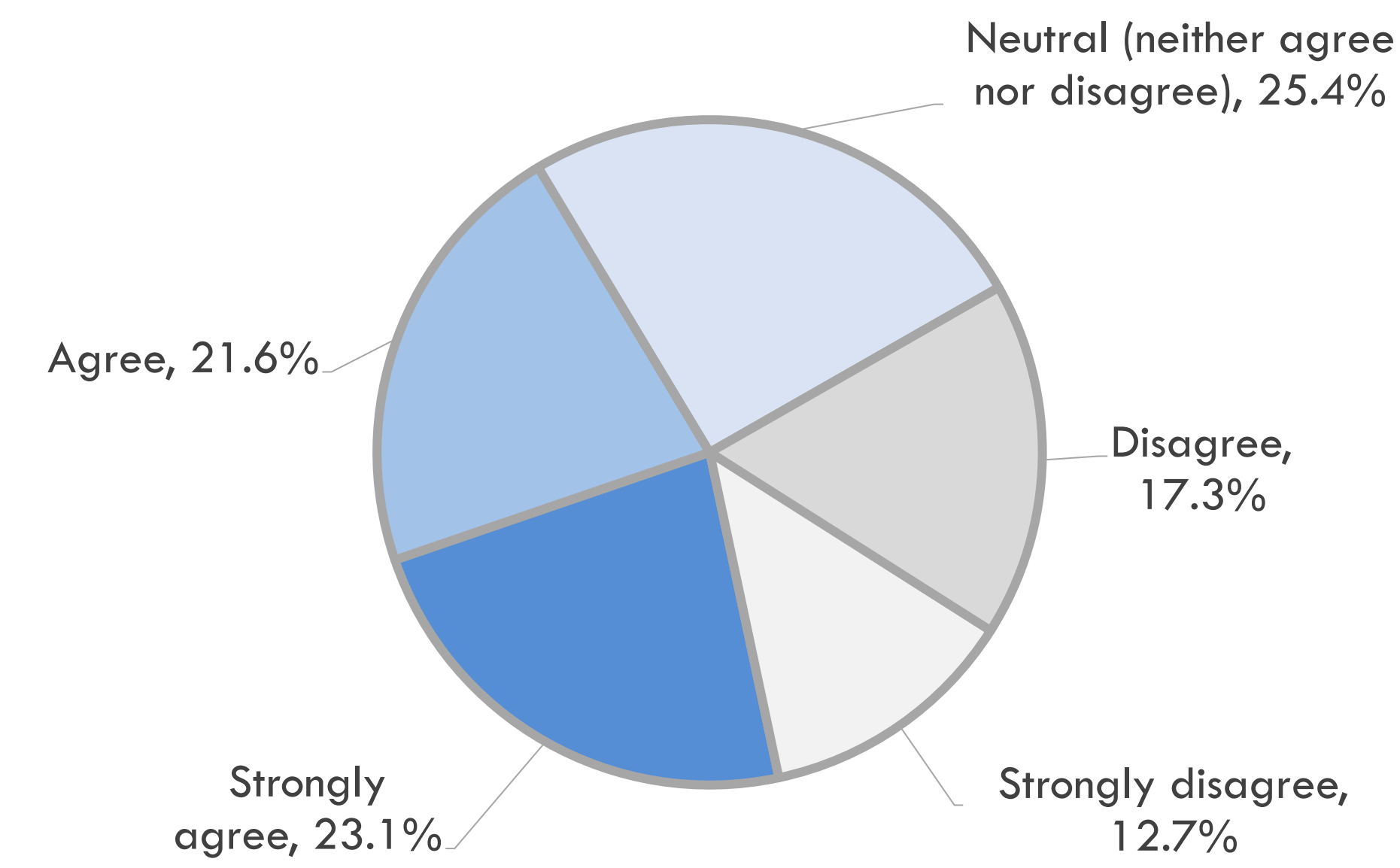
FEELINGS ABOUT A COVID-19 VACCINE



TRAVEL UNTIL THERE IS A VACCINE

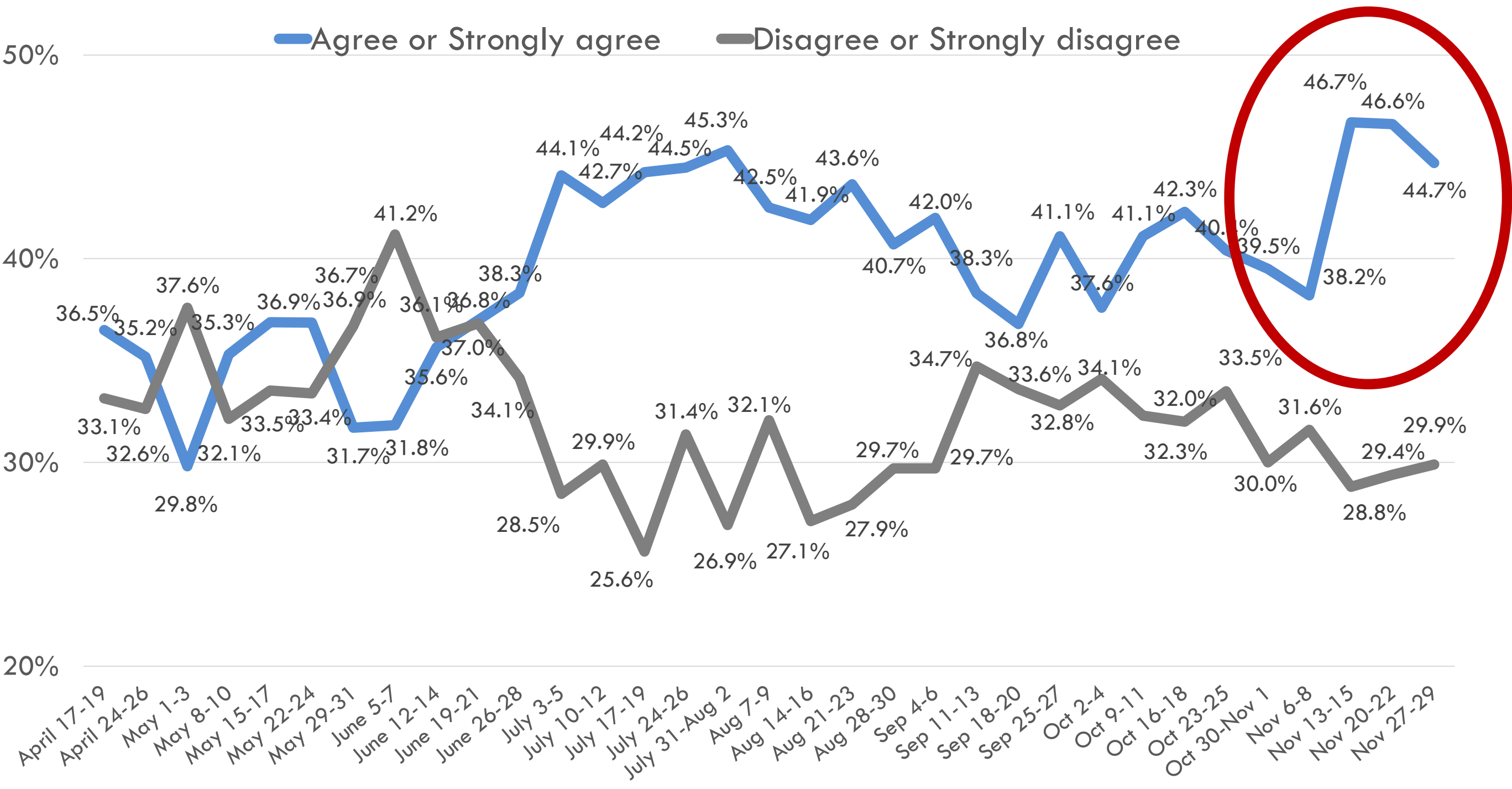
How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.



(Base: Waves 6-38. All respondents, 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, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 completed surveys.

Historical data

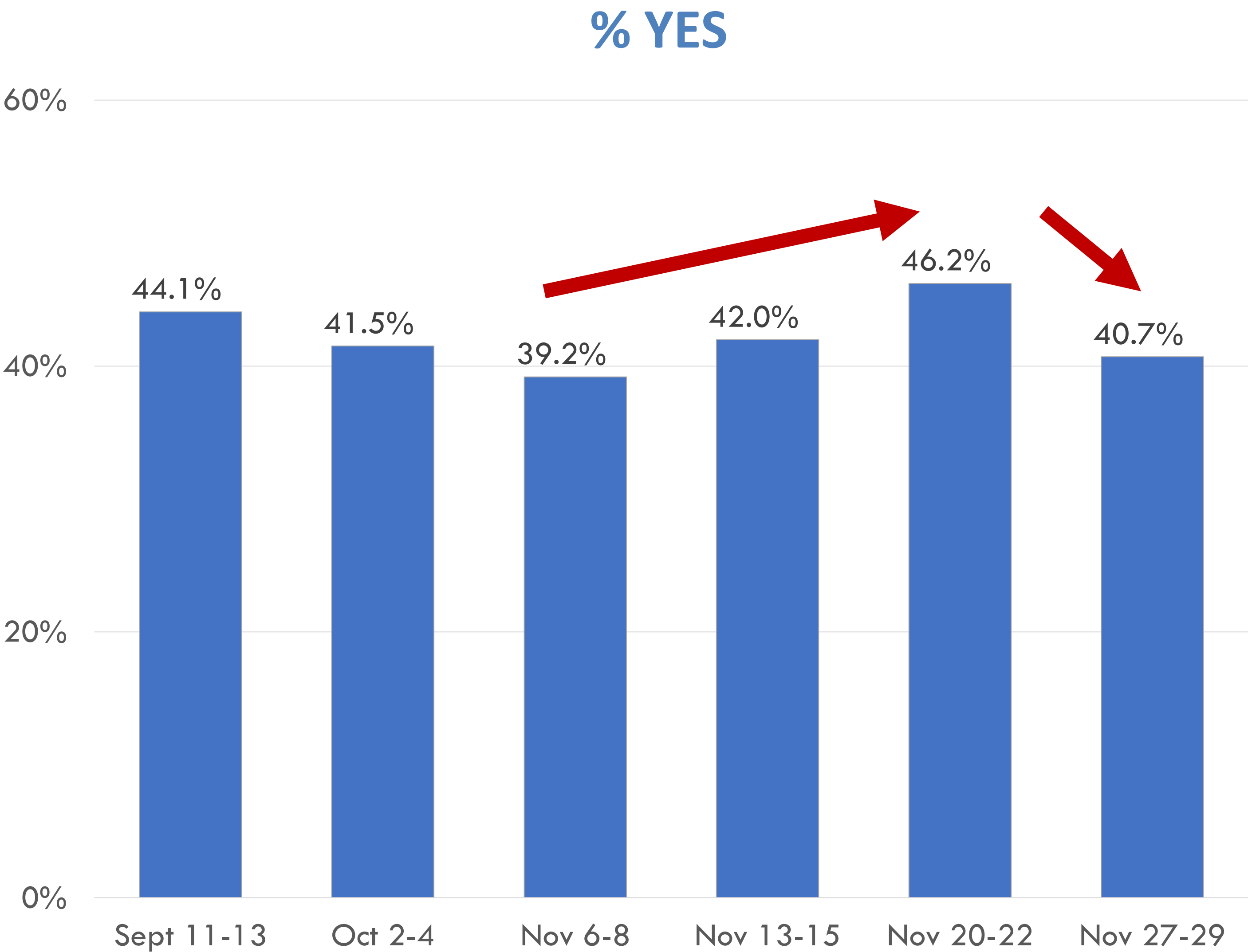


WILLINGNESS TO TAKE A VACCINE

Question: If a COVID-19 vaccine is developed later this year (or early next year) and approved for use, would you take it?

(Assume the vaccine is 75% effective and has mild to moderate side effects)

(Base: Wave 35-38 data. All respondents, 1,205, 1,206, 1,205 and 1,205 completed surveys.)

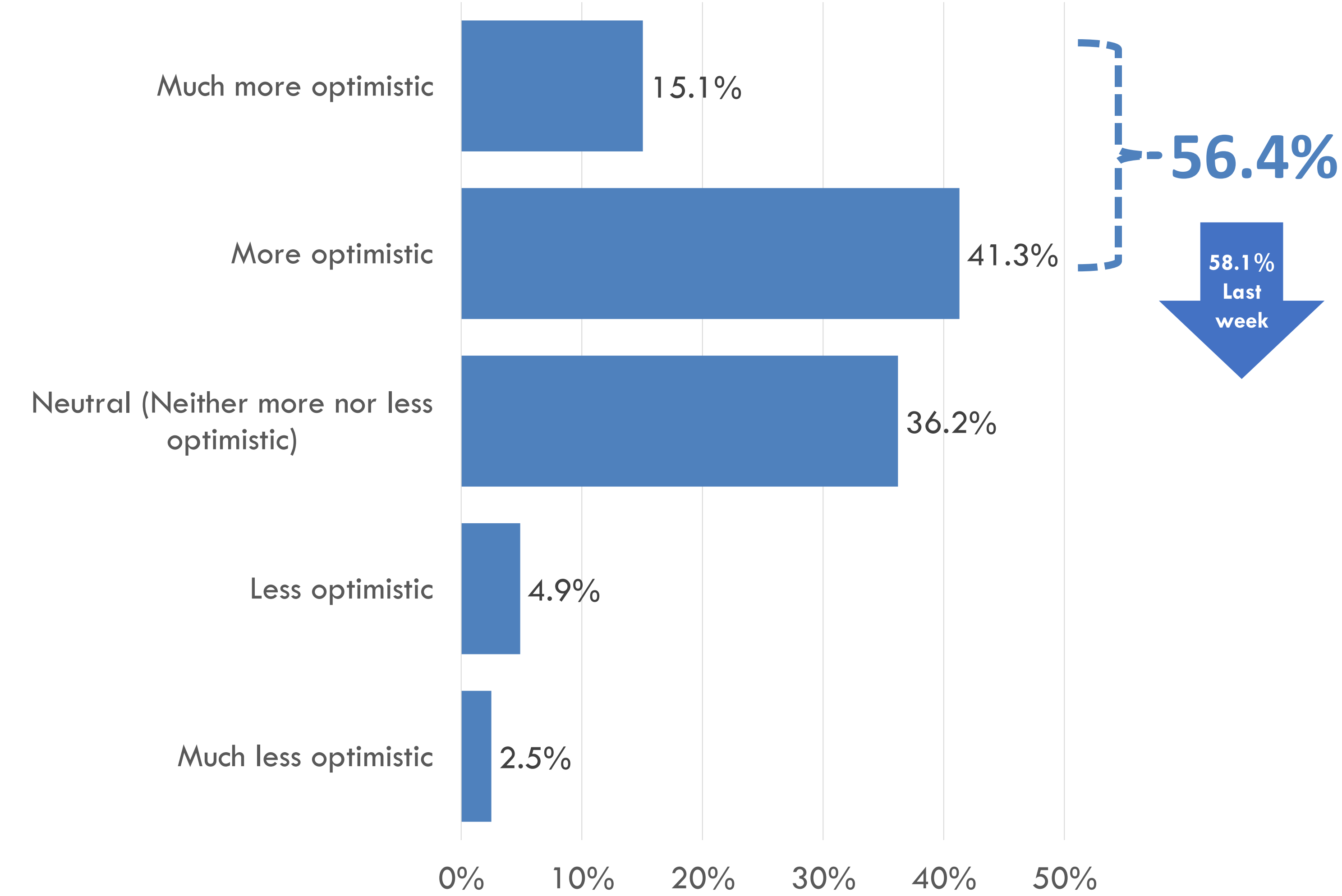


VACCINES AND EXPECTED RETURN TO NORMALCY

Question: Does recent news about vaccine developments affect your optimism about life returning to normal (or near normal) in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about life returning to normal (or near normal) in the next six months.

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

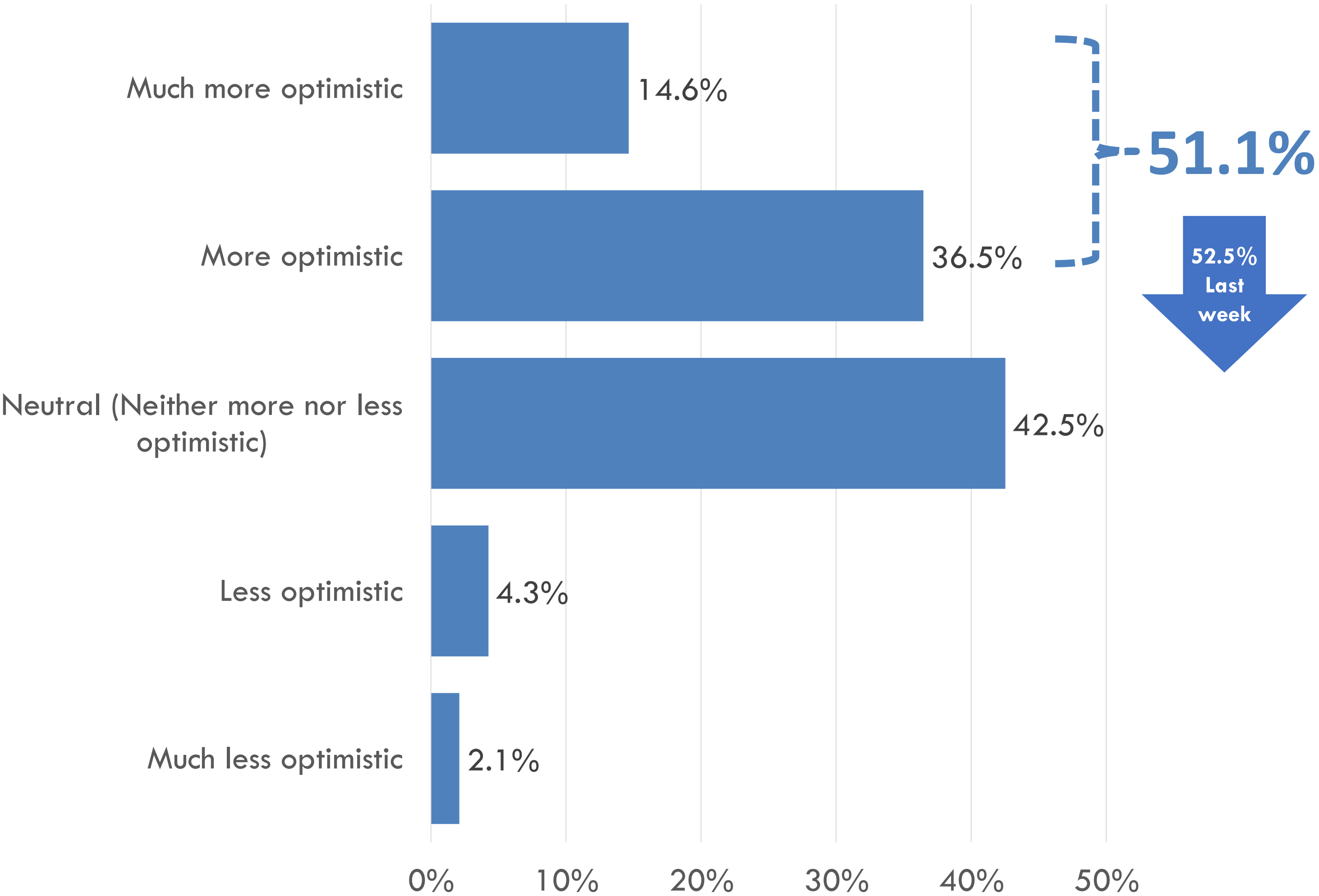


VACCINES AND EXPECTED RETURN TO TRAVEL SAFETY

Question: Does recent news about vaccine developments affect your optimism about being able to travel safely in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about BEING ABLE TO TRAVEL SAFELY in the next six months.

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

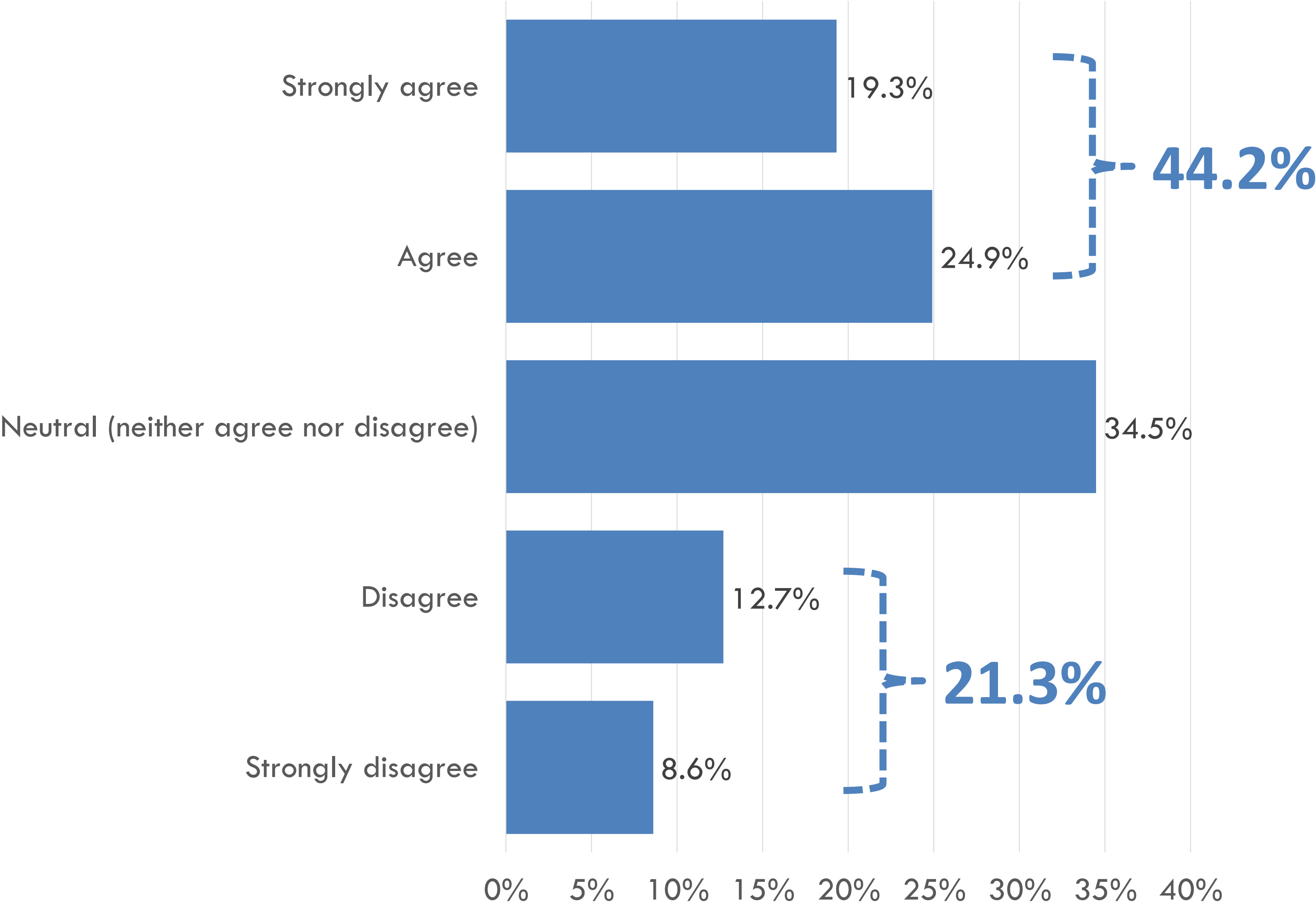


LIKELIHOOD OF A MAJOR TRIP AFTER VACCINE DISTRIBUTION

Question: How much do you agree or disagree with the following statement?

My first trip after a COVID-19 vaccine becomes available will be a vacation, likely to a place far from my home.

(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

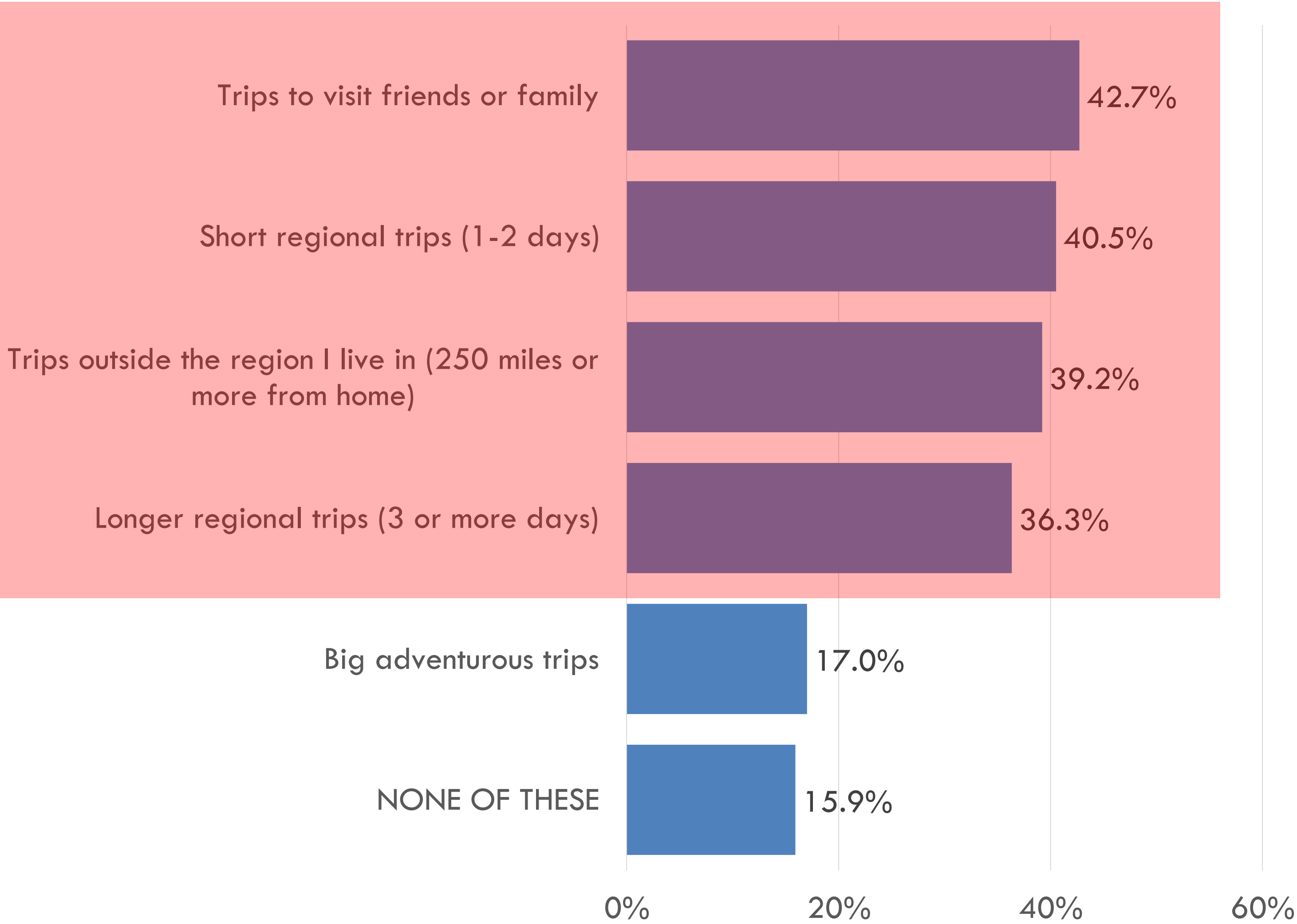


TRIPS IMMEDIATELY AFTER VACCINES DISTRIBUTION

Question: Tell us about the trips you are likely to take after a COVID-19 vaccine becomes available.

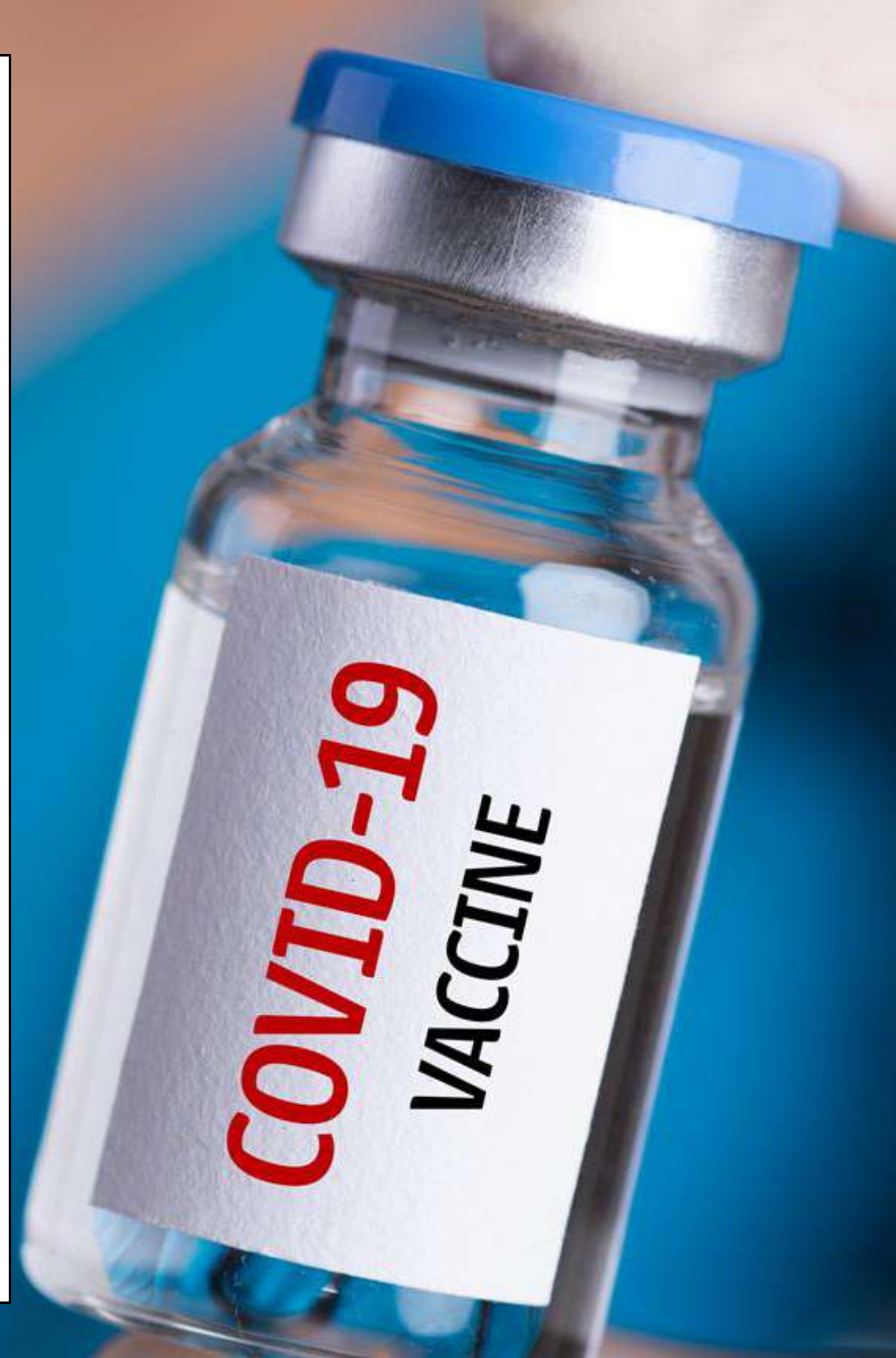
In the **THREE (3) MONTHS** immediately after a COVID-19 vaccine is made widely available, which types of trips are you likely to take?


(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



KEY TAKEAWAYS

1. American travelers agree with more restrictive rules in their home community and that it's important to follow government-mandated restrictions to control COVID-19.
2. The institution of COVID-related state restrictions would make some Americans feel more comfortable visiting that state.
3. There are signs of hope regarding future travel. Over half of Americans are more optimistic about life returning to normal and that they can travel safely in the next six months as a result of recent news about vaccine developments.
4. The travel industry is well-positioned to benefit from the development and distribution of a vaccine.





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