

H2R MARKET RESEARCH

TRAVEL & ATTRACTIONS

COVID-19 UPDATE

Survey Results

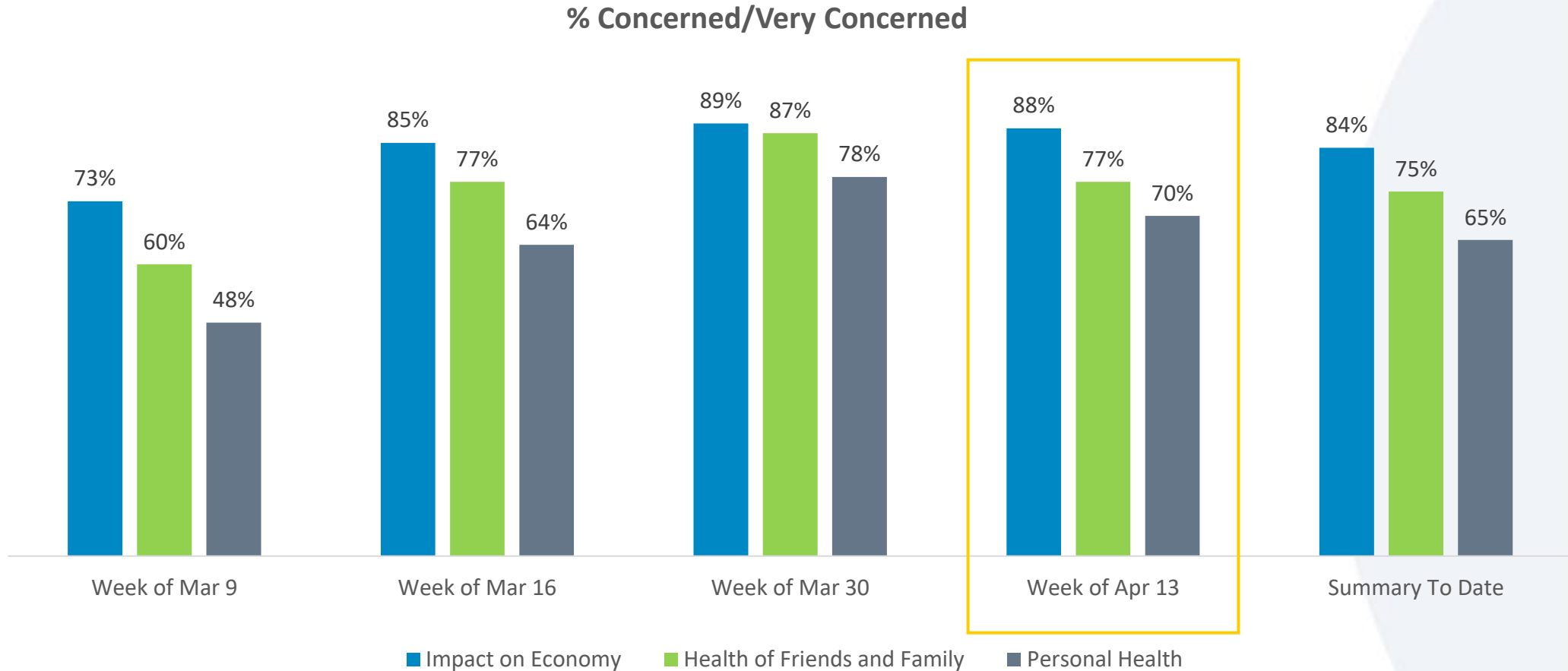
Wave 4 - Week of April 13

The purpose in conducting this research is to measure the potential impact COVID-19 will have on the travel and attractions industry as well as reveal consumer sentiment over the duration of the pandemic.

This data reflects the fourth wave of H2R's COVID-19 Travel & Attractions Research conducted the week of April 13, from a nationwide, professionally managed consumer panel of people who have traveled for leisure in the past 12 months. 152 responses were collected for this wave, providing for a maximum margin of error of +/-8.0% at a 95% confidence interval.

To date, a total of 601 travelers have been interviewed for this study which provides for a maximum margin of error of +/-4.0% at a 95% confidence interval.

Concern over health remains acute; however, the intensity of that concern appears to have peaked dropping from 78% to 70% this week. Meanwhile, concern over the economy has maintained.

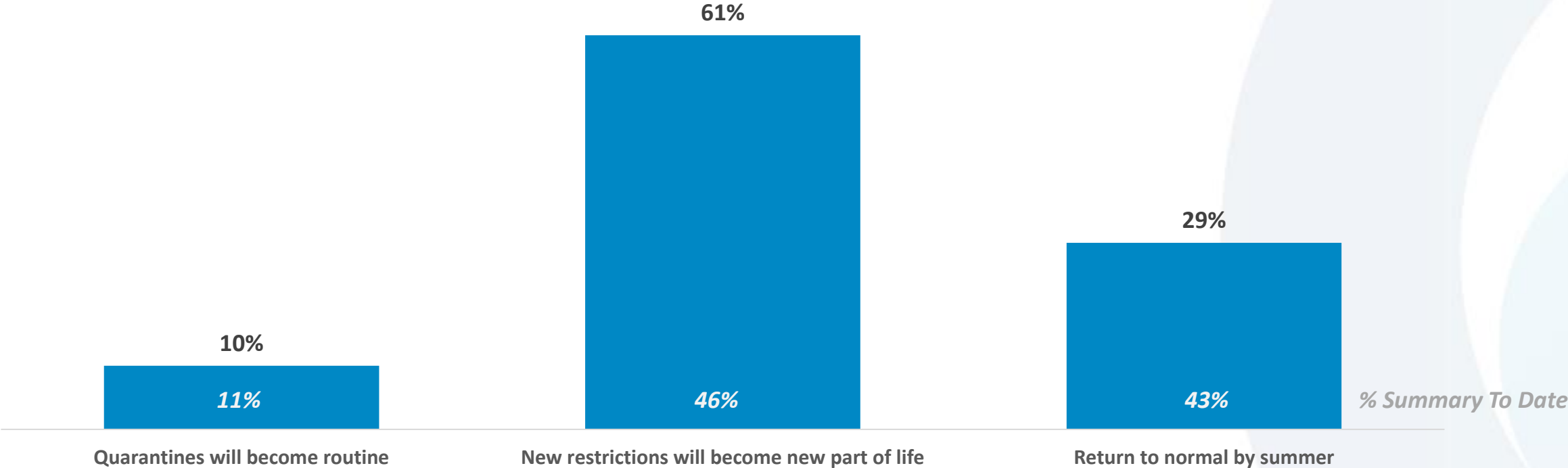


Please indicate how concerned you are about COVID-19 as it relates to your own personal health & safety.

RESPONDENT BASE: 152n Wave 4 | 603n Summary to Date

Most believe that new restrictions will become a new part of life while 29% expect things to return to a new normal sometime this summer.

Most Likely U.S. Outcome by This Summer
Week of April 13 vs Summary To Date

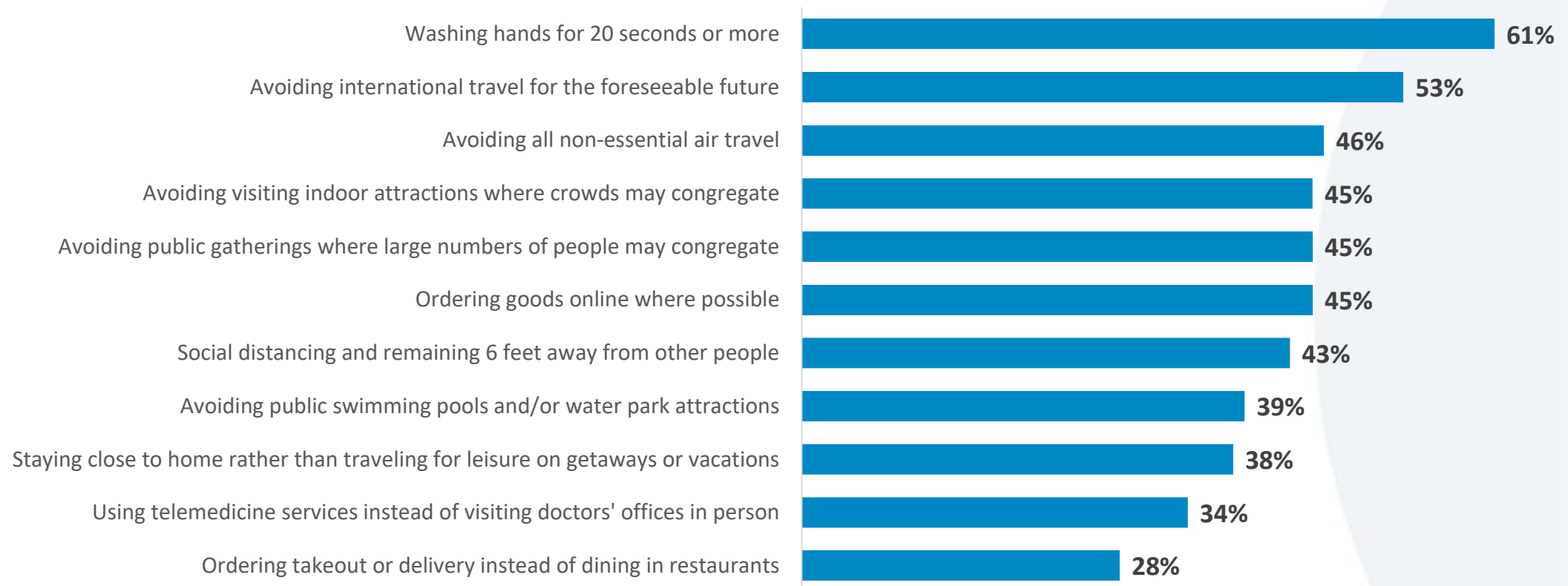


Which of the following outcomes do you believe the U.S. will most likely experience this summer?

RESPONDENT BASE: 152n Wave 4 | 603n Summary to Date

Some new consumer behaviors are expected to last for a prolonged length of time such as hand washing for 20 seconds, avoiding international travel and public gatherings.

Consumer Behaviors Expected to Last Long After Threat Subsides – Week of April 13



After the immediate crisis caused by the coronavirus pandemic is over, which of the following new consumer behaviors do you believe may last for a prolonged period of time?

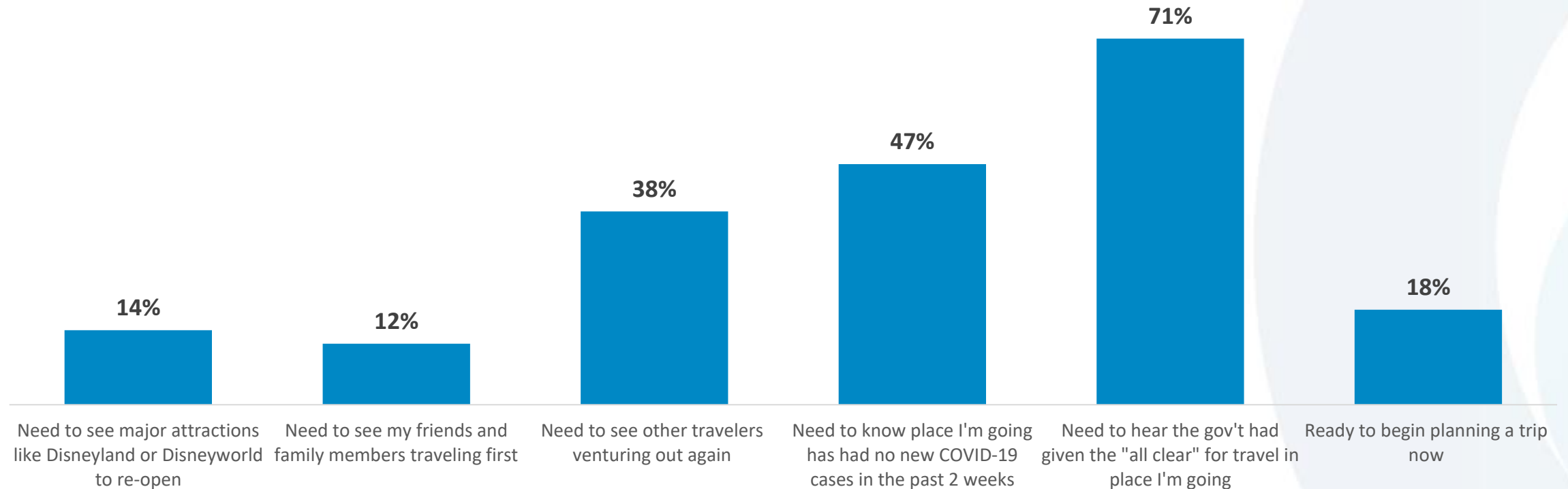
RESPONDENT BASE: 152n Wave 4

4

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Most (71%) this week say they will need to hear some sort of governmental “all clear” before they will consider visiting a destination for leisure travel, but this is down from 76% in early April.

Environmental Cues Need to Hear in Order to Feel Comfortable Planning Leisure Travel – Week of April 13



What would it take for you to feel comfortable enough to begin planning a leisure trip somewhere? Choose your top two choices.

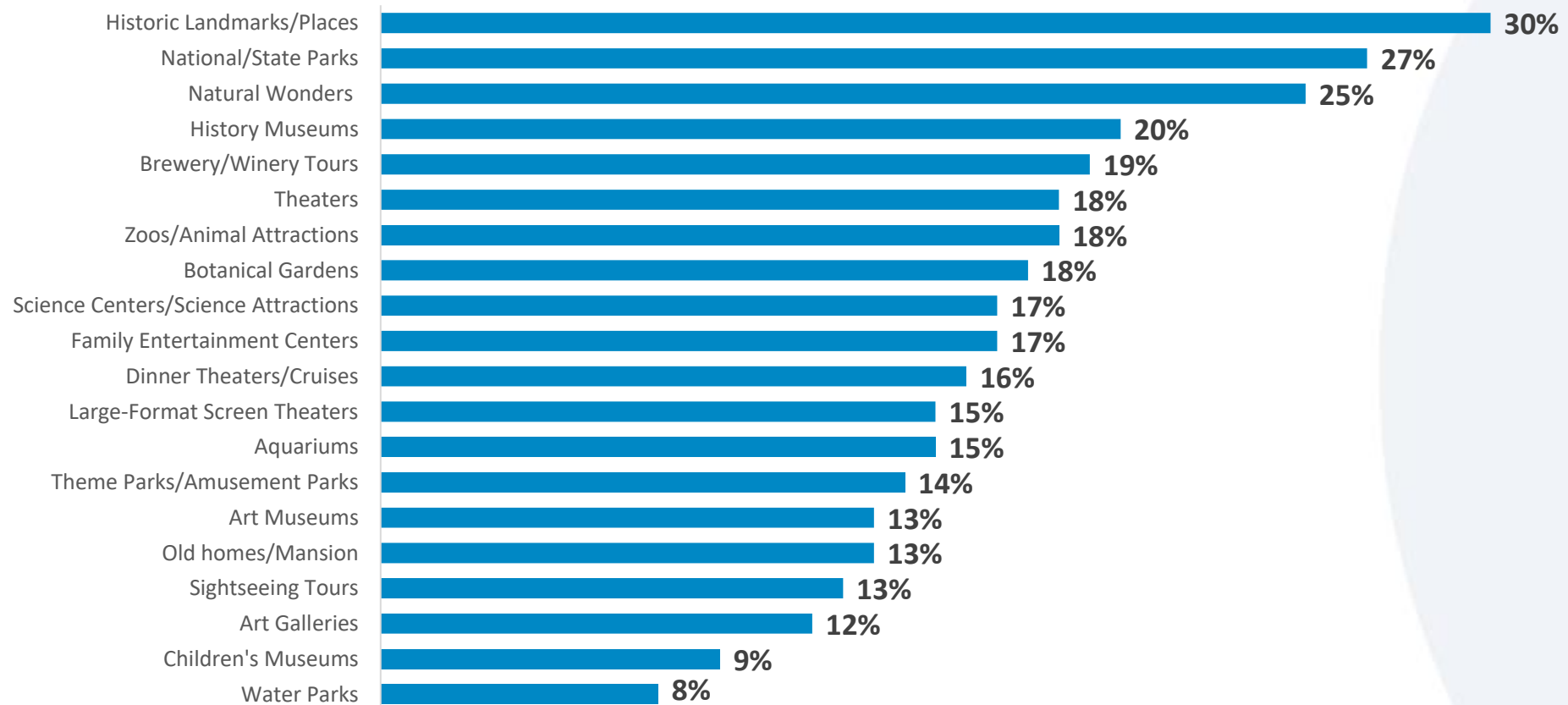
RESPONDENT BASE: 152n Wave 4

5

This week travelers indicated they are most likely to visit Historic Places, National/State Parks and Natural Wonders in 2020. Children's Museums, Water Parks and Dinner Theaters are near the bottom.

Intent to Visit Attractions in 2020 – Week of April 13

% Definitely/Probably Will Visit



Please indicate how likely you are to visit each of the following types of attractions in 2020.

RESPONDENT BASE: 152n Wave 4

6

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