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...

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.

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

- Near the Very Beginning: I expect the pandemic to continue through the summer of 2022, if not longer. (24%)
- Approaching Halfway: I expect the pandemic to continue to be problematic through the fall of 2021. (12%)
- Just Past the Mid-Point: I expect it to come to an end around this time next summer (2021). (26%)
- Over the Hump, but Still Have a Ways To Go: I expect the pandemic to be trailing of by the spring of 2021. (10%)
- It is Already Almost Over: I expect the pandemic to end just as soon as the current surge is brought under control. (9%)
- The Worst is Probably Behind Us: I expect the pandemic to end sometime around the end of 2020. (7%)

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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.

### Consumer Attitudes Toward Activities

- **Shopping inside a store for a non-essential item**
  - Not Risky: 28%
  - Moderate Risk: 45%
  - Too Risky: 27%

- **Dining on the patio/outdoor seating at a restaurant**
  - Not Risky: 24%
  - Moderate Risk: 46%
  - Too Risky: 30%

- **Going to the hair salon/barbershop**
  - Not Risky: 23%
  - Moderate Risk: 40%
  - Too Risky: 36%

- **Staying overnight in a national hotel chain**
  - Not Risky: 18%
  - Moderate Risk: 41%
  - Too Risky: 41%

- **Dining inside a restaurant**
  - Not Risky: 18%
  - Moderate Risk: 37%
  - Too Risky: 45%

- **Visiting a museum, aquarium or science attraction**
  - Not Risky: 16%
  - Moderate Risk: 37%
  - Too Risky: 47%

- **Visiting a theme park or zoo**
  - Not Risky: 16%
  - Moderate Risk: 34%
  - Too Risky: 50%

- **Attending a religious service indoors**
  - Not Risky: 17%
  - Moderate Risk: 32%
  - Too Risky: 51%

- **Staying overnight in a vacation rental (Airbnb, HomeAway, etc.)**
  - Not Risky: 18%
  - Moderate Risk: 30%
  - Too Risky: 52%

- **Taking a taxi/rideshare (like Uber, Lyft, etc.)**
  - Not Risky: 12%
  - Moderate Risk: 35%
  - Too Risky: 52%

- **Sitting in a classroom going to school**
  - Not Risky: 16%
  - Moderate Risk: 32%
  - Too Risky: 53%

- **Flying on a commercial airplane**
  - Not Risky: 12%
  - Moderate Risk: 30%
  - Too Risky: 57%

- **Going to the gym/fitness studio**
  - Not Risky: 12%
  - Moderate Risk: 30%
  - Too Risky: 59%

- **Visiting a water park**
  - Not Risky: 14%
  - Moderate Risk: 27%
  - Too Risky: 59%

- **Taking public transportation (bus, train, etc.)**
  - Not Risky: 12%
  - Moderate Risk: 26%
  - Too Risky: 61%

- **Attending a professional sporting event**
  - Not Risky: 14%
  - Moderate Risk: 22%
  - Too Risky: 64%

- **Going to the hair salon/barbershop**
  - Not Risky: 12%
  - Moderate Risk: 19%
  - Too Risky: 69%

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

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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.

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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.

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

**Early Adopter**
I have already ventured out and visited an attraction or traveled for leisure
14%

**Fast Follower**
I will be among the first to get back out and visit attraction(s) or travel for leisure
11%

**Early Adapter**
I will get back out and visit attraction(s) or travel for leisure just as soon as I see others doing so safely
17%

**Laggard**
I will not get back out and visit attractions or travel again until a proven vaccine or treatment is introduced
21%

**Late Adapter**
I will likely wait a while to get back out and visit attractions or travel until after new COVID cases decline or a treatment is found
37%

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

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.

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**Early Adopter’s Satisfaction with Attraction Visit Experience**

<table>
<thead>
<tr>
<th>Category</th>
<th>% Satisfied/Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>The overall environment this attraction provided to optimize your feeling of safety and confidence</td>
<td>58%</td>
</tr>
<tr>
<td>The communication this attraction provided before entering about what specific actions were being employed/expected</td>
<td>53%</td>
</tr>
<tr>
<td>The degree to which this attraction enforced or encouraged visitors to follow the guidelines they put in place</td>
<td>53%</td>
</tr>
<tr>
<td>The actions this attraction took to try and prevent further spread of COVID-19</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Attractions Experience Net Promoter Score**

- Promoters: 37%
- Neutrals: 34%
- Detractors: 29%

**Overall Score:** 8%

(-20 pts vs. To Date)

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).

**H2R COVID Confidence Index**

<table>
<thead>
<tr>
<th>Week of June 8</th>
<th>Week of June 22</th>
<th>Week of July 6</th>
<th>Week of July 20</th>
<th>Summary to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>51.9</td>
<td>38.4</td>
<td>40.8</td>
<td>27.0</td>
<td>38.7</td>
</tr>
</tbody>
</table>

Respondent Base: 170n Already Ventured Out

Summary To Date

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

Actions You Would Consider Doing at Attractions or While Traveling

% Probably/Definitely Would...

- Stay a minimum of 6 feet between parties while waiting in lines
  - Summary to Date: 67%, Week of July 20: 66%

- Have temperature taken before entering airport security checkpoints
  - Summary to Date: 67%, Week of July 20: 61%

- Bring your own facial mask and wear it at attractions, retail stores, etc.
  - Summary to Date: 66%, Week of July 20: 64%

- Have temperature taken before entering attractions, restaurants or retail spaces
  - Summary to Date: 61%, Week of July 20: 58%

- Dine outdoors on restaurant patios or shaded areas rather than inside
  - Summary to Date: 56%, Week of July 20: 52%

- Make a reservation to visit an experience at a specific window of time in order to help control capacity, crowds and queue lines
  - Summary to Date: 48%, Week of July 20: 41%

- Pay a higher admission price to experience smaller crowds and shorter queue lines
  - Summary to Date: 25%, Week of July 20: 26%

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...

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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.

Barriers to Visiting Attractions or Taking Leisure Trips in the Next 6 Months

Select Top 3

Concern about being in large crowds  Fear of being exposed to coronavirus  Other people not acting responsibly  Experience has new restrictions; not all aspects are available  Lost job or wages making it difficult to afford  Being made to wear a mask when visiting  Lack of available direct flights  Fear of flying

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.

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

Masks as a Barrier vs. Willingness to Bring Your Own Mask to Wear

By Consumer Type

Note Masks as a Barrier to Visiting Attractions and Traveling  Willingness to Bring Your Own Facial Mask and Wear it at Attractions and While Traveling

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...

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

- Reminders that the attraction is open for business: 11% (+1 pt. vs. To Date)
- New exhibit, ride or guest experience: 6% (No Change vs. To Date)
- Branded marketing message that features what makes an attraction different from others: 8% (+1 pt. vs. To Date)
- Discount, bargain or deal of some type: 29% (-3 pts vs. To Date)
- New governance rules or changes to the visitor experience designed to protect visitors: 34% (-1 pt. vs. To Date)
- Other: 12% (+1 pt. vs. To Date)

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>An effective vaccine or therapeutic treatment will be found</td>
<td>43%</td>
</tr>
<tr>
<td>Like some other viruses in the past, this one will eventually run its course and slowly fade away on its own</td>
<td>18%</td>
</tr>
<tr>
<td>The virus will eventually infect enough people that as a society we naturally reach herd immunity</td>
<td>11%</td>
</tr>
<tr>
<td>A large enough percentage of the population will begin wearing masks on a regular basis and the virus will die out</td>
<td>10%</td>
</tr>
<tr>
<td>Eventually the process of identification, isolation and contract tracing will enable us to get the virus under control</td>
<td>8%</td>
</tr>
<tr>
<td>None – I don’t believe this pandemic will ever come to an end</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

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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.

<table>
<thead>
<tr>
<th>Event</th>
<th>Week of July 6</th>
<th>Week of July 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second wave of coronavirus hitting the United States</td>
<td>49%</td>
<td>61%</td>
</tr>
<tr>
<td>Another near total lockdown of non-essential businesses</td>
<td>44%</td>
<td>37%</td>
</tr>
<tr>
<td>Vaccine is found and proven safe for the public</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>A global depression will slowly unfold as world economies continue to struggle</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>Favorite restaurant(s) close permanently</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Therapeutic drug that treats coronavirus effectively is discovered</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>Travel industry begins to rebound</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Unemployment hits 25% and remains there for a prolonged length of time</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Trust in most forms of news media declines</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Favorite attraction(s) close permanently</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Donations to charitable causes increase</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>People become kinder and gentler, and violence decreases</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Tracking the everchanging attitudes of consumers across the nation from August into October.

Learn more about our partnership opportunities here:

h2rmarketresearch.com/calloftheconsumer