

2020 Consumer Summer Vacation Plans Survey

OAAA
June 2020



on device
research

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Research Essentials

LONDON - SINGAPORE - DUBAI

OnDeviceResearch.com



The OAAA (Out Of Home Advertising Association of America) wanted to understand the impact that the current COVID-19 outbreak has had on US consumers' summer vacation plans..

N=1000

18 plus adults
Nat Rep on
gender and age.
Natural fallout
on income.

Fieldwork
period: 22nd
May to 1st June
2020

Screen & Profile

Travel behavior

Summer vacation –
Plans &
transportation

Summer vacation –
Activities &
accommodation

Regional representation of total sample

Northeast	21%
Midwest	19%
South	38%
West	23%

		Composition
Gender	Male	50%
	Female	50%
Age	18-24	17%
	25-34	17%
	35-44	16%
	45+	50%
Income	NET Up to \$49,999	45%
	NET \$50,000 - \$99,999	31%
	NET \$100,000+	15%
Residence	Population center of one million or less	71%
	Population center of over one million	29%



= facts about population centers of over one million are noted with a yellow star throughout the report

Key Learnings

1

Summer vacations will still take place and the car will dominate.

- 53% are still planning to take a summer vacation despite COVID-19.
- 78% will be undertaking a journey by road to reach their summer vacation destination. 62% plan to use their personal car as their primary mode of vacation transportation.
- 25% plan to fly to their destination, with those ages 25-34 more likely to do so.

2

Visiting friends and family is the primary purpose of this year's summer vacation.

- Relaxation and tradition also feature as top reasons for vacation.
- By age, we see interesting subtleties in motivations for summer break:
 - 18-24's for example are more likely to list sightseeing as a reason for summer break.
 - For 45 plus however, it is relaxation that features more prominently.
- By region also:
 - Those in the Northwest relaxation and family/friends hold near equal motivation.
 - In the Midwest sightseeing is cited more and in the South relaxation.

3

National journeys will occur for summer vacation.

- 54% of summer vacation journeys will be national in nature (trips totaling over 400 miles roundtrip).
- 13% plan to travel over 1000 miles this summer.

4

For the majority, planned travel distance this year is similar or greater than last year.

- 63% are travelling the same distance or longer this year for summer break.
- The younger demos, ages 18-34, are planning to travel further this year versus last.

5

The South is the favored destination for this year's break.

- 39% stating this is where they plan to take their vacation, with Florida (16%) the top destination.
- California is the next most favored destination at 10%.
- Regional travel patterns emerge. The majority of those in the South plan to vacation in the same region, but cross state journeys will be made – most likely by those in the Midwest and Northeast.

6

Key Takeaway: Vacation length and party size also remains unchanged.

- 71% said they plan to take a week or more this summer break, with 65% saying the length this summer's trip will be the same or longer than last year. 17% in fact state they are actually spending more time on vacation this year compared to last!
- 47% will be vacationing with 3 or more people, with 72% saying their party size will be the same or larger than last year.
- 18-25's are significantly more likely to be taking longer this break than last, and to be vacationing with 3 or more companions.

7

Over half plan to rent accommodations.

- 54% still plan to rent accommodation, with hotel/motel the most favored at 27%.
- 37% will be staying with family and friends – but this has not overtly increased year on year.

8

Consumer spending will be largely unaffected.

- 69% said they plan to spend the same or more as last summer.
- 60% are planning to spend \$1000 or more this year, while 24% are planning to spend over \$2500 this year.
- Those with higher income are significantly more likely to be spending over \$2500 this year.

9

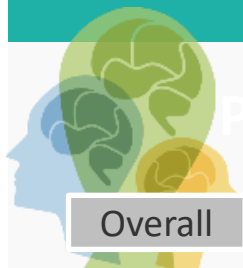
Those most impacted by COVID restrictions, in cities of over 1 million, are most likely to vacation.

- 60% still plan a vacation this year.
- 57% more likely to report excitement about summer vacation than consumers in cities of 1 million or less
- 79% more likely to travel a greater distance than last summer versus those in cities of 1 million or less
- 2.5X more likely to be taking a longer vacation this year versus those in cities of 1 million or less
- 58% more likely to be spending more this year versus those in cities of 1 million or less
- 36% more likely to be spending over \$2500 on vacation versus those in cities of 1 million or less

10

Reassure and consumer will come.

- The primary messages that consumer want to hear are those of reassurance:
- General cleanliness (32%) and social distancing rules (31%) are the primary messages, with availability of activities (28%) and special pricing/discounts (27%) also featuring.
- Different consumers need reassurance in different ways:
 - For females, all of the above messages are important and should be considered.
 - For those 45 plus, it is the general cleanliness message that rates the highest.
 - High income consumers place greater importance on the messages of general cleanliness, rules of social distancing, activities and special pricing.



Planning Implications from Phase 2

Overall

Summer vacations will still take place for most.

The vast majority of trips will be road journeys.

Consumers in markets of more than one million show a greater propensity for increased travel distance, stay length, and spend versus 2019.

Messages of reassurance in dealing with COVID pandemic will be important to consumers.

Specifically

53% still plan a summer vacation, with road journeys seeing a huge spike as the primary transportation mode this summer.

Younger consumers significantly more likely to be taking vacation.

Visiting family/friends is the key reason for vacation – relaxation and tradition also feature.

54% of vacation journeys will be national in nature (more than 200 miles one way).

For 63% the distance will be the same or greater than last year.

The South is the most favored destination, with some journey cross state to reach location.

The West region shows a greater appetite for air travel.

71% will be taking a week or more for vacation, which remains unchanged for 65% of consumers.

Travel will be made in groups of 3 or more, and for 72% this has not changed since last year.

The same pattern exists for spending plans.

18-24's more likely to be taking longer away, with more people and spending more versus last year.

However, consumers need reassurance on cleanliness and distancing, along with price benefits and activities.

Opportunities

Roadside is premium!

Roadside is king as the primary mode of transport for summer vacation.

Youth audience

18-24's continue to be power movers, planning to spend more time away, with more people and spend more than last year on vacation. Given their OOH movements, opportunities clearly exist to engage this audience via OOH media.

Location opportunities

Given the planned journey patterns seen by region, opportunities exist to tailor communications around destination accordingly. Layer activities of interest accordingly.

Rental accommodations will be in demand

Consumers will be staying in rented accommodation – primarily hotel/motels. Opportunities for such brand to engage consumer exist. Where possible hotel/motel brands should layer activities/locations of nearby interest accordingly to help drive consideration.

Consumers in markets over 1 million are the most ready to vacation

They've been most impacted by COVID restrictions and are now ready for a break. Compared to consumers in markets of 1 million or less, they are more excited about vacationing, plan to travel longer and further, and spend more money.

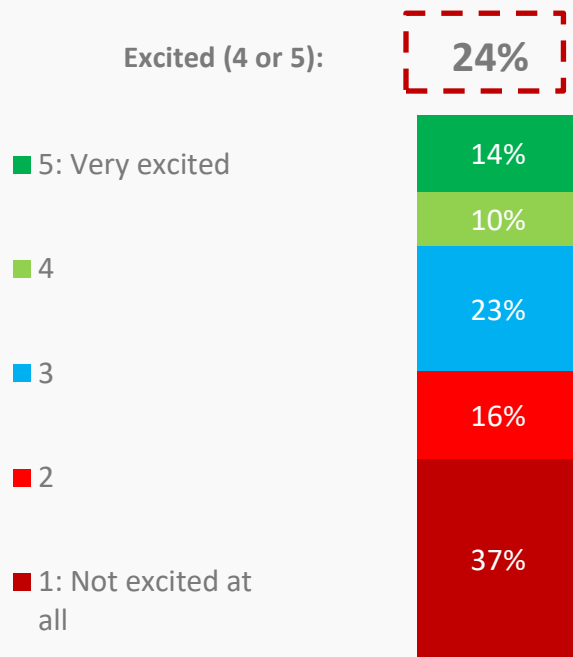
Everyone needs reassurance, but some need it more and in different ways.

Ensure that communications cover the key areas of consumer concern. But remember to tailor messages for your audience, and reinforce them where possible, as some, for example females and high income consumers, will require greater reassurance than others.

Summer vacation –
excitement and planning.

24% are excited about this years summer vacation.

Summer vacation excitement.



	Excited (4 or 5)
Male	31% ▲
Female	17%
18-24	36% ▲
25-34	31%
35-44	21%
45+	19%
<\$50K	27%
\$50K - <\$100K	23%
\$100K+	24%
Live in city of over 1m	33% ▲
Live in city 1m or less	21%

- Excitement is significantly stronger among males, those 18-24 and those who live in a city of over 1m population.

On a scale of 1 to 5, where 5 means very excited and 1 means not excited at all, how are you feeling about your summer vacation plans?

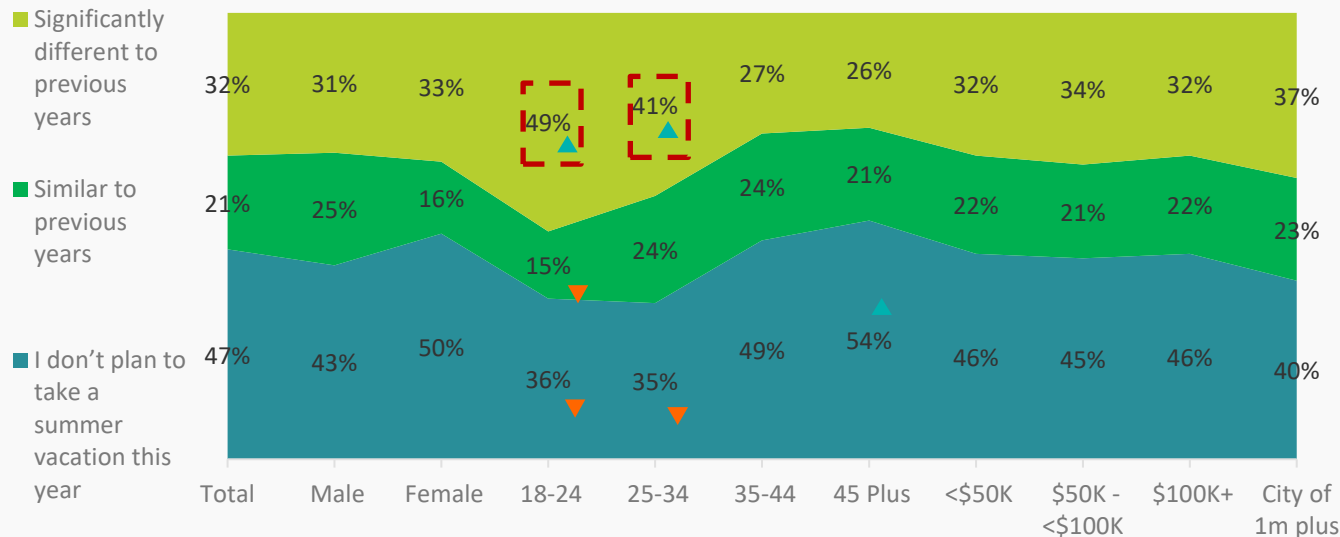
Base: Total sample (1000), Male (500), Female (500), 18-24 (170), 25-34 (170), 35-44 (160), 45 plus (500), Less than 50k (446), 50 to 100k (306), 100k plus (153)

53% of consumers still plan a summer vacation this year.

Summer vacation plans this year versus last year.



Planning to take vacation:	53%	56%	49%	64%	65%	51%	47%	54%	56%	54%	60%
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Compared to recent years, are your summer vacation plans....

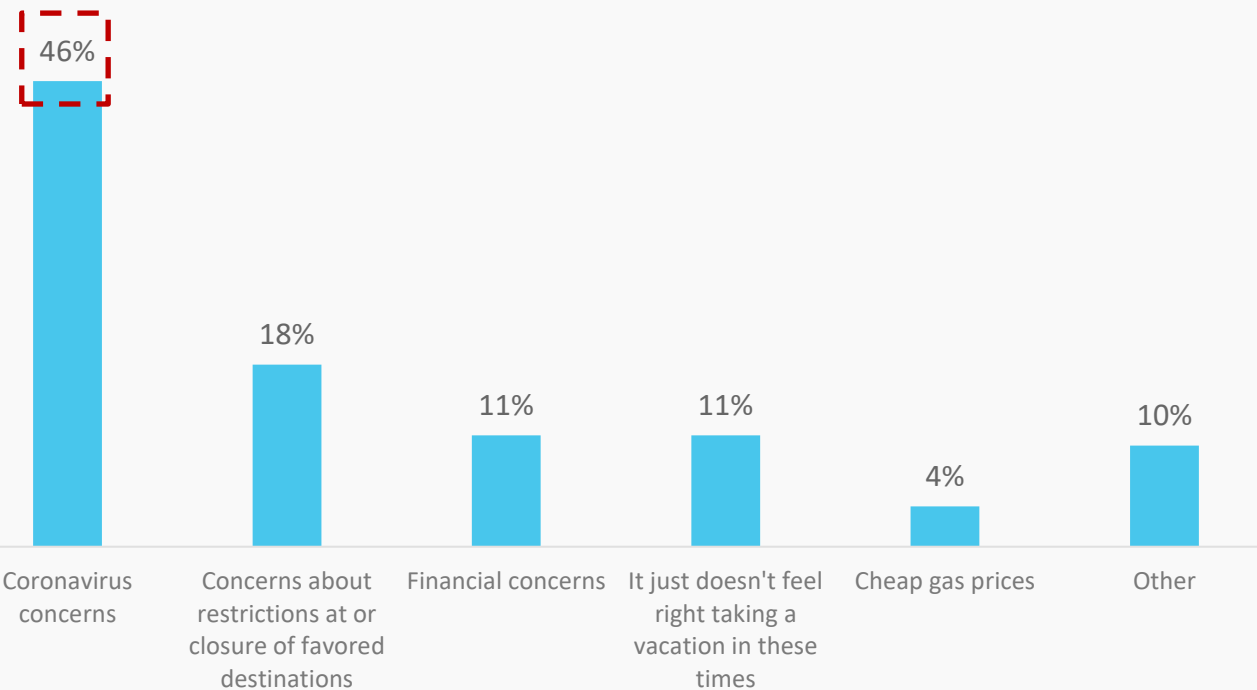
Base: Total sample (1000), Male (500), Female (500), 18-24 (170), 25-34 (170), 35-44 (160), 45 plus (500), Less than 50k (446), 50 to 100k (306), 100k plus (153)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- 32% of these consumers have made significantly different plans versus last year.
- Younger consumer, who are more likely to be planning a summer vacation, are significantly more likely to have changed plans to do so.

Among consumers whose plans are different from recent years, coronavirus concerns are the primary reason for the change.

Main reason for change.



What is the main reason for this change?

Base: Those whose vacation plans have changed: Total sample (792)

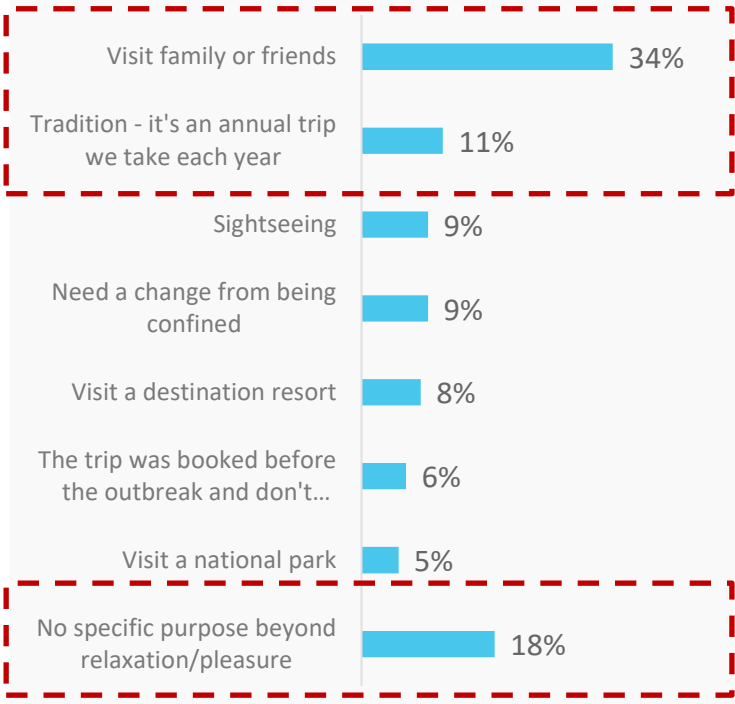
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Summer vacation – purpose
and destinations.

Visiting friends and family is the primary reason for this years vacation.

Main purpose of vacation.

Total Sample



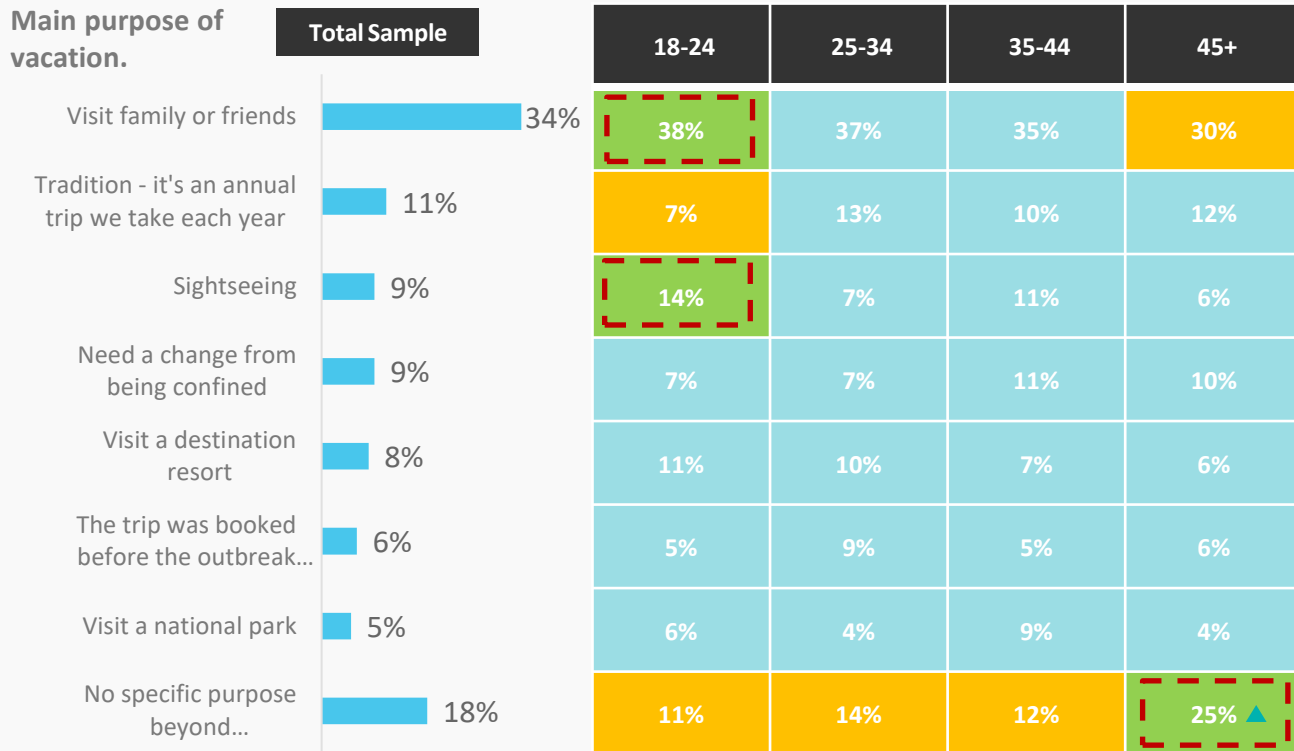
	Male	Female
Visit family or friends	32%	37%
Tradition - it's an annual trip we take each year	12%	9%
Sightseeing	9%	8%
Need a change from being confined	10%	8%
Visit a destination resort	10%	6%
The trip was booked before the outbreak and don't...	5%	8%
Visit a national park	5%	6%
No specific purpose beyond relaxation/pleasure	17%	18%

- Relaxation (18%) and 'tradition' (11%) also feature.

What is the main purpose of your summer vacation?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249)

But within specific demographic groups, there are other motivations.



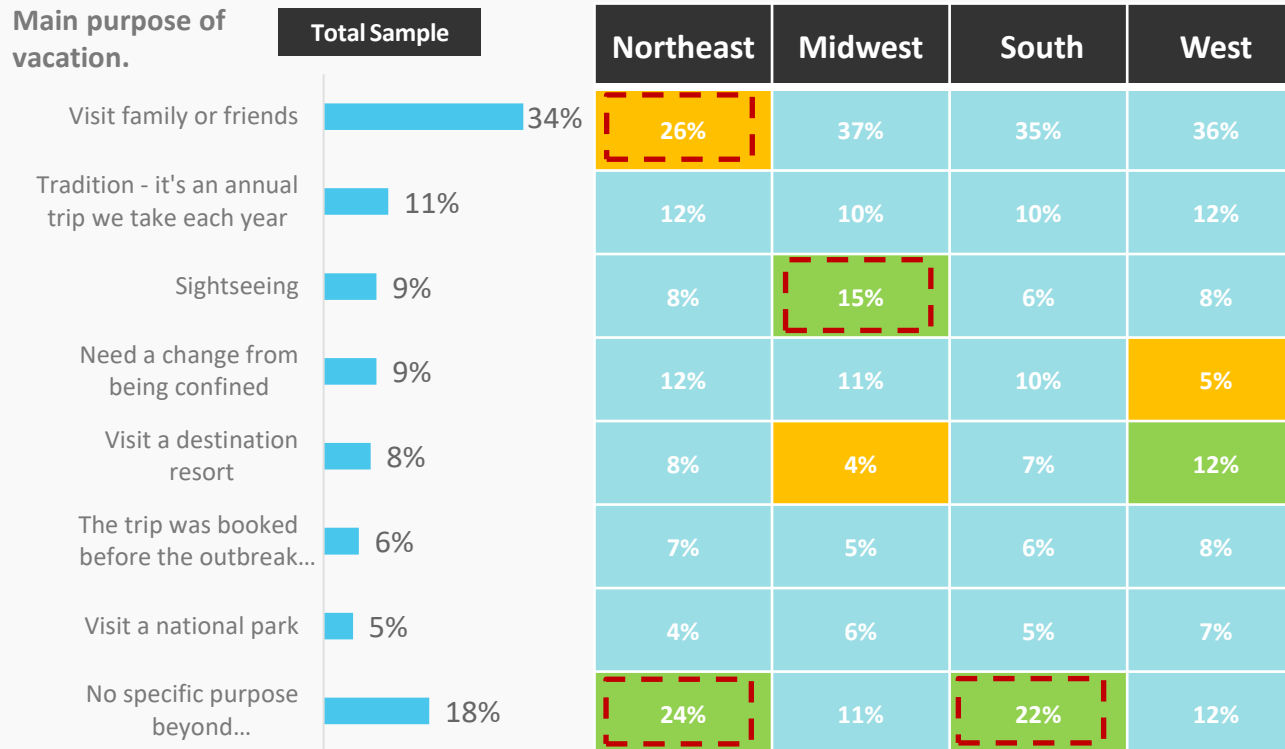
What is the main purpose of your summer vacation?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- 18-24's for example are more likely to incorporate sightseeing into this years vacation, along with visiting family or friends.
- While for those 45 plus, relaxation plays a significantly bigger role.

US regional differences in vacation purpose also appear.



What is the main purpose of your summer vacation?

Base: All who plan summer vacation: Total sample (532), Northeast (102), Midwest (99), South (208), West (123)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

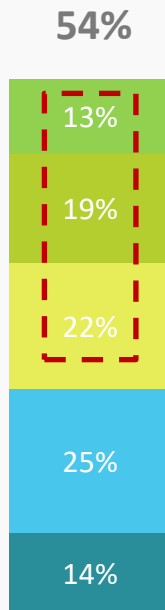
- For those in the Northeast seeing family or friends is just as important as relaxation.
- Sightseeing more influential in the Midwest.
- In the South relaxation plays a stronger role.

Over half of summer vacations will be national in scope with round-trip journeys of 400 miles or more.

Distance planning to travel.

Plan to travel nationally (versus locally or regionally):

- National – over 1000 miles
- National 501 – 1000 miles
- National 201 – 500 miles
- Regional (within 200 miles)
- Local (within 50 miles)



	National net
Male	52%
Female	56%
18-24	47%
25-34	56%
35-44	51%
45+	58%
<\$50K	48%
\$50K - <\$100K	61%
\$100K+	63%
Live in city of over 1m	52%
Live in city 1m or less	55%

- 54% of summer vacation journeys will be national in nature.
- 13% plan to travel over 1000 miles this summer.
- 19% plan to travel 501 to 1000 miles.
- National journeys are more likely to be undertaken by those with higher incomes.

Approximately what distance do you plan to travel to reach your summer vacation destination (one-way)?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

The longer trips are significantly more likely from those based in the Midwest.

Distance planning to travel.

	Northeast	Midwest	South	West
International	1%	7%	5%	16% ▲
National net	47%	64% ▲	57%	49%
National – over 1000 miles	10%	11%	13%	18%
National 501 – 1000 miles	16%	28% ▲	20%	13%
National 201 – 500 miles	21%	25%	24%	18%
Regional (within 200 miles)	30%	19%	26%	21%
Local (within 50 miles)	23% ▲	9%	13%	14%

Distance...

Approximately what distance do you plan to travel to reach your summer vacation destination (one-way)?

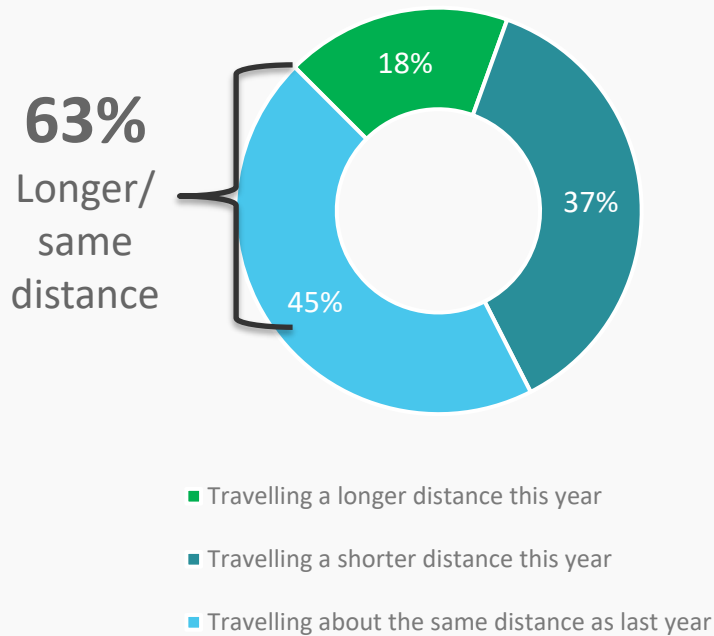
Base: All who plan summer vacation: Total sample (532), Northeast (102), Midwest (99), South (208), West (123)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Overall, 64% of consumers in the Midwest are planning a national trip, with 28% planning to travel 501 to 1000 miles.
- Interestingly, those in the West are significantly more likely to be planning international travel this summer.
- Opportunities for local tourism are greatest in the Northeast.

63% are travelling the same or longer distance this year for summer vacation.

Distance travelled versus last year.



Distance plan to travel	Longer	Same
Male	21%	45%
Female	15%	44%
18-24	23%	33% ▼
25-34	23%	41%
35-44	16%	48%
45+	14%	51%
<\$50K	25% ▲	35% ▼
\$50K - <\$100K	11%	55% ▲
\$100K+	15%	52%
Live in city of over 1m	25%	37%
Live in city 1m or less	14%	48%

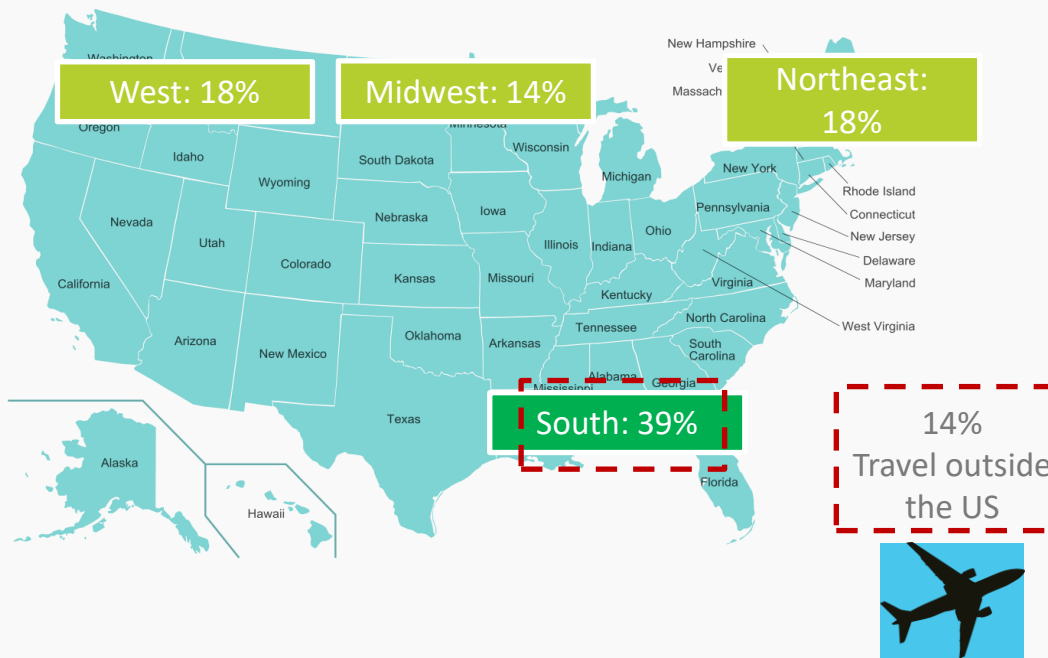
- 18-34's and those living in a city of over 1 million are more likely to have increased the distance they plan to travel for this years summer vacation.
- Longer journeys are also more likely among those earning under \$50k.

Approximately what distance do you plan to travel to reach your summer vacation destination (one-way)?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

The South is the favored destination of 39% for this year's summer vacation.

Top destinations.



Sample % by Region	
Northeast	21%
Midwest	19%
South	38%
West	23%

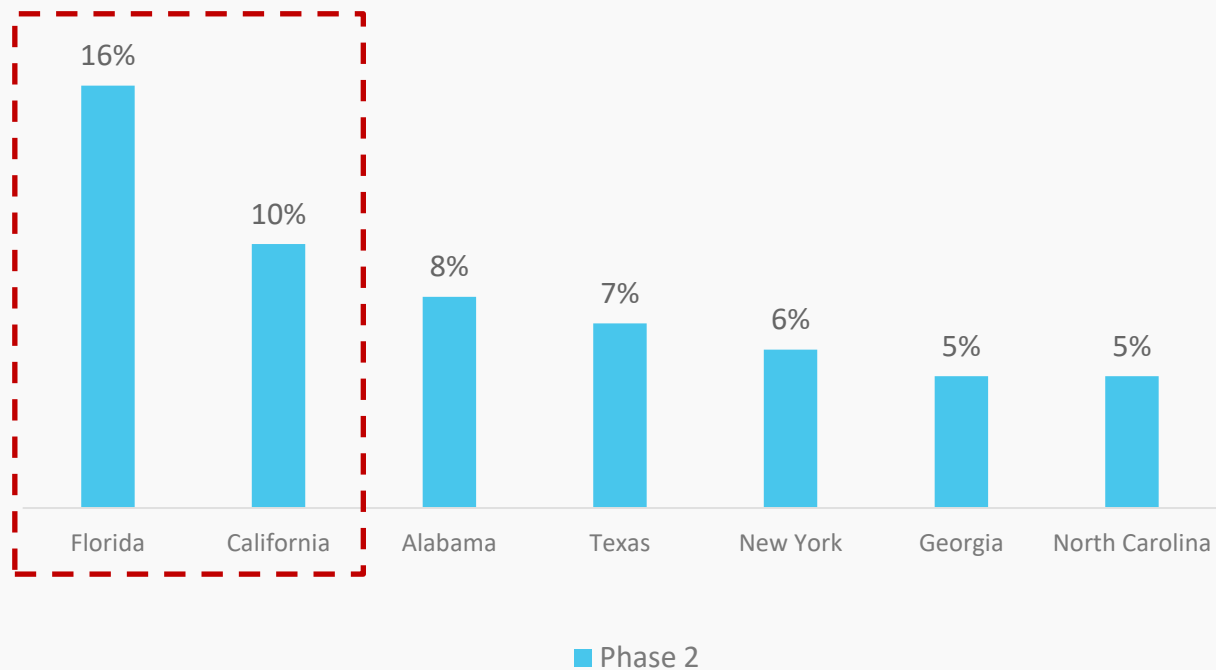
Where do you plan to travel for your summer vacation? If you plan to travel to more than one location, please select all the locations you plan to travel to

Base: All who plan summer vacation: Total sample (532)

- Followed by the West (18%) and Northeast (18%).
- International vacations are of interest to consumers – 14% indicating interest in such.

Florida (16%) and California (10%) are the top vacation destinations.

Top destinations.




Where do you plan to travel for your summer vacation? If you plan to travel to more than one location, please select all the locations you plan to travel to

Base: All who plan summer vacation: Total sample (532)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Westerners are most likely to travel outside their home region, while consumers from the Northeast and Midwest have the greatest propensity to visit the South.

Destinations by region.

	Region live in			
	Northeast	Midwest	South	West
Northeast	56%	5%	8%	12%
Midwest	3%	57%	6%	8%
South	30%	22%	65%	14%
West	6%	10%	11%	47%
	5%	13%	11%	25% ▲

Where do you plan to travel for your summer vacation? If you plan to travel to more than one location, please select all the locations you plan to travel to

Base: All who plan summer vacation: Total sample (532), Northeast (102), Midwest (99), South (208), West (123)

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- In the South, 65% of those living in this region plan to take their vacation there.
- Cross state journey more likely in the Northeast and Midwest - 30% and 22% respectively planning to travel to South from these locations.
- International locations of significantly more interest in the West.

California, Wisconsin, New York and Florida are the top state destinations for consumers living within these respective regions.

Top destinations by region.

West	
California	27%
Washington	10%
Alaska	10%
Florida/Alabama/Arizona	8%
Colorado/Hawaii	7%

Midwest	
Wisconsin	15%
Florida	13%
Texas	11%
Illinois	11%
Michigan	11%

Northeast	
New York	18%
New Jersey	14%
Pennsylvania	13%
Florida	10%
Massachusetts	9%

South	
Florida	25%
Alabama	11%
Texas	9%
Georgia	9%
North Carolina	8%

Where do you plan to travel for your summer vacation? If you plan to travel to more than one location, please select all the locations you plan to travel to

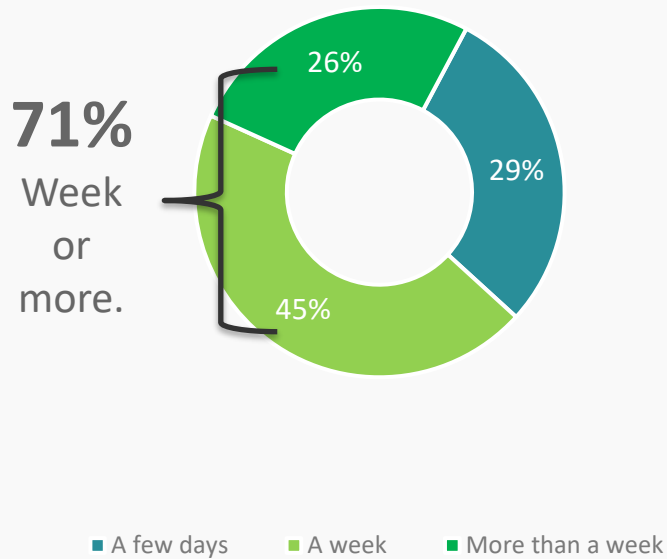
Base: All who plan summer vacation: Total sample (532), Northeast (102), Midwest (99), South (208), West (123)

- In the West, California is by far the favoured destination.
- The same is true in the South for Florida.
- For the Midwest, it is Florida and Wisconsin that consumers favor most as a destination.
- In the Northeast, New York, New Jersey and Pennsylvania are the key locations.

Summer vacation – the trip
in more detail.

71% plan to take a week or more of vacation this year.

Number of vacation day.



	A week	More than a week
Male	41%	29%
Female	49%	22%
18-24	50%	28%
25-34	48%	22%
35-44	38%	22%
45+	43%	29%
<\$50K	42%	26%
\$50K - <\$100K	51%	24%
\$100K+	41%	30%
Live in city of over 1m	43%	30%
Live in city 1m or less	46%	24%

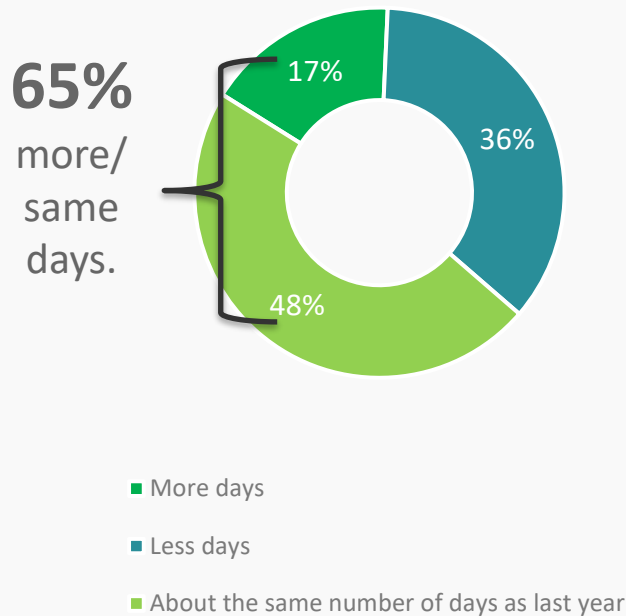
- 45% will take a week, 26% will take more than a week.

How many days are you planning to be on summer vacation?/Compared to last year, will you be on vacation for fewer or more days this summer?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

For the majority, summer vacation length has remained unchanged.

Number of vacation days versus last year.



	Same	More
Male	47%	20%
Female	48%	13%
18-24	37%	26% ▲
25-34	35%	22%
35-44	46%	21%
45+	59%	9%
<\$50K	42%	21%
\$50K - <\$100K	50%	14%
\$100K+	59% ▲	9%
Live in city of over 1m	39%	28% ▲
Live in city 1m or less	52%	11%

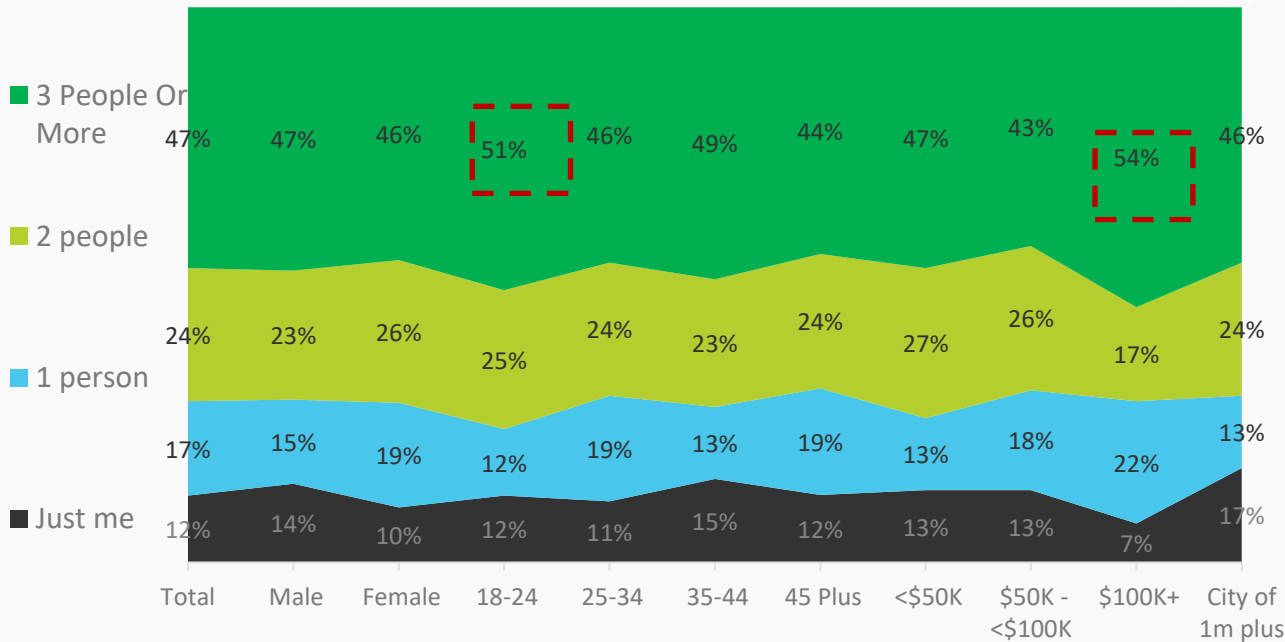
- 65% plan the same or more number of days away this year as they did last.
- 17% are actually planning more days away this year.
- While high income consumers are significantly more likely to take the same number of days this year as last, the 18-25's and those in a big city are more likely to vacation for longer.

How many days are you planning to be on summer vacation?/Compared to last year, will you be on vacation for fewer or more days this summer?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

Journey will be made in groups – 47% are planning to travel with 3 or more people.

Number of people travelling with.



- 18-25's and those earning \$100k plus are more likely to be traveling in groups of 3 plus people this year.

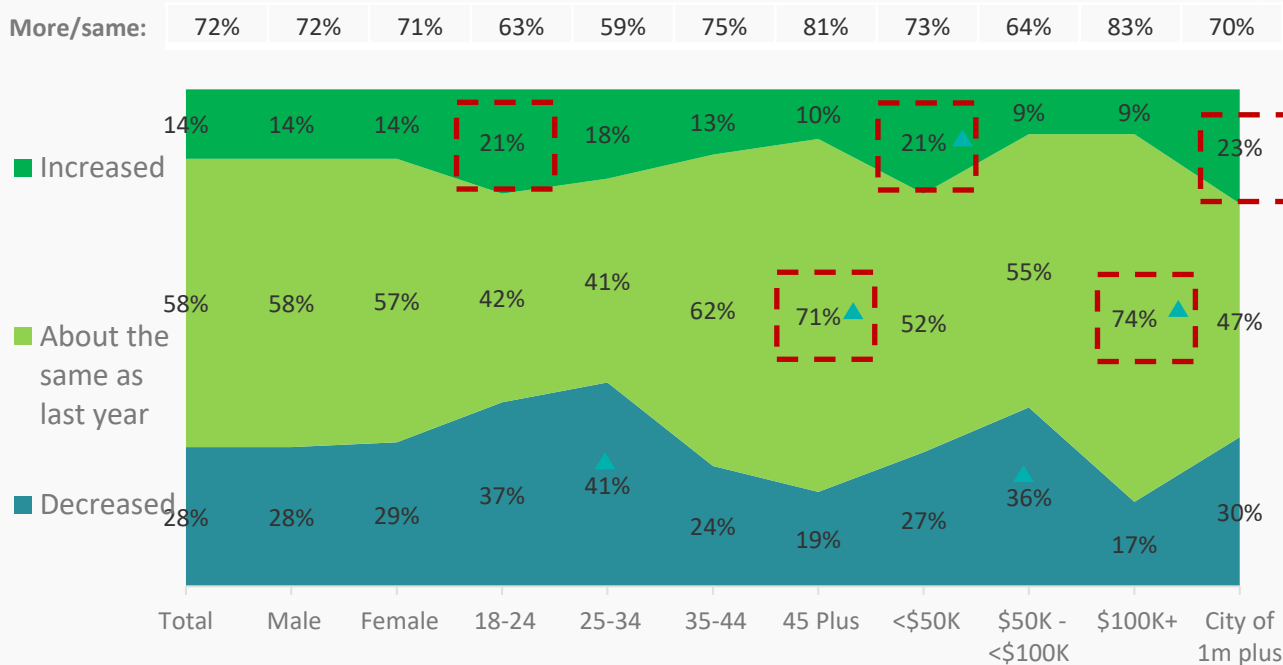
And how many people will be going away on summer vacation with you this year?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

For 72% of vacation travelers, their party size will remain the same or increase since last year.

Travel party size versus last year.



And has the number of people you are travelling with this year increase or decreased?

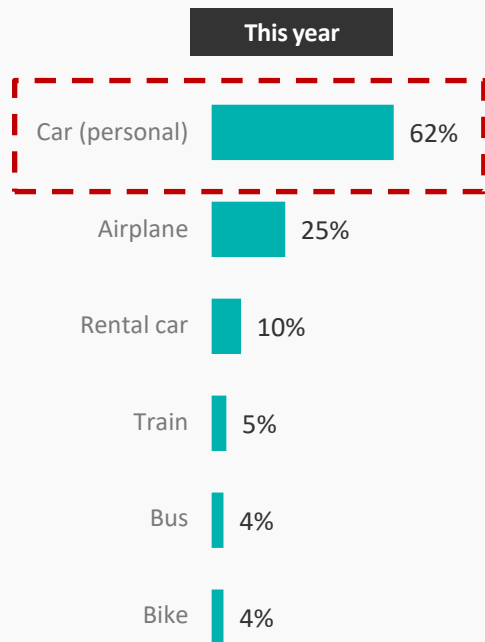
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- 58% state the travel party size is about the same as last year – with those 45 plus and higher income individuals more likely to have an unchanged party size.
- Overall, 14% will actually travel with more companions, increasing to 21% amongst those 18-25 and earning under \$50k and 23% amongst those in a big city.

The vast majority of consumers will use their personal car as transportation for this year's vacation.

Mode of transport..



30%

Using the same primary mode of transport as last year

What mode of transportation do you plan to use for your summer vacation this year?/Did you use the same primary mode of transportation for last year's summer vacation? If not, what primary mode did you use last year?

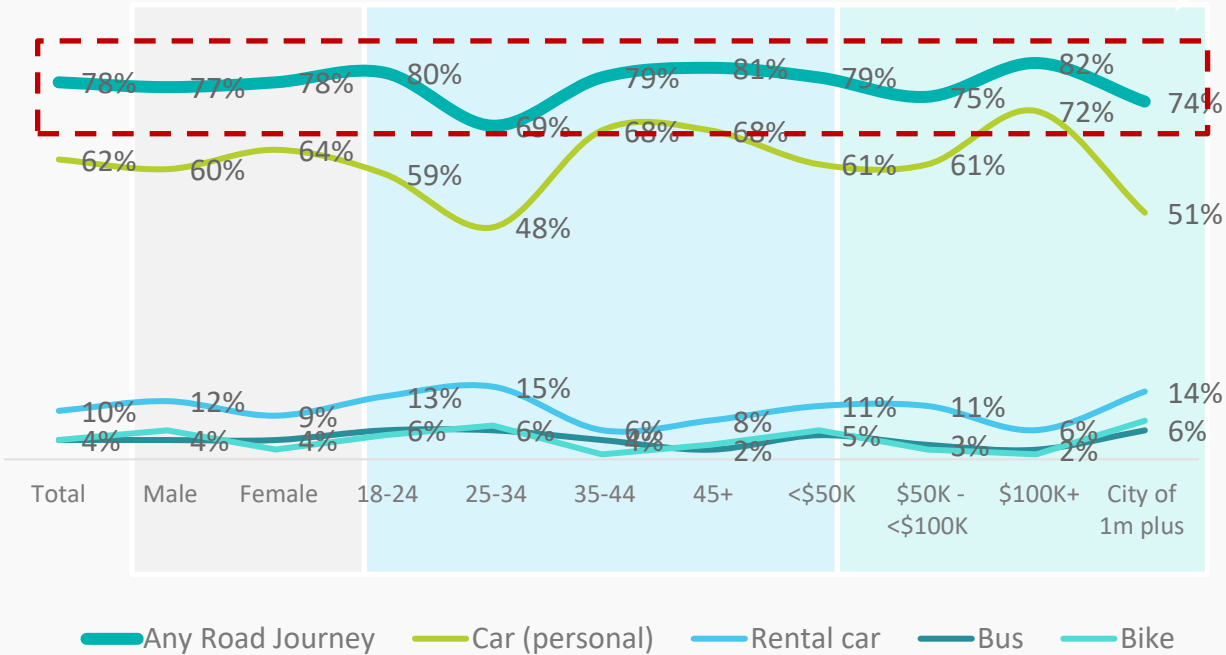
Base: All who plan summer vacation: Total sample (532)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- 62% state they will use their own car this year.
- Air travel is planned – 25% will use an airplane to reach their summer vacation destination.
- For 30%, the primary mode of transport hasn't changed year over year.

'Road journeys' will dominate this years travel.

Mode of transport this year.



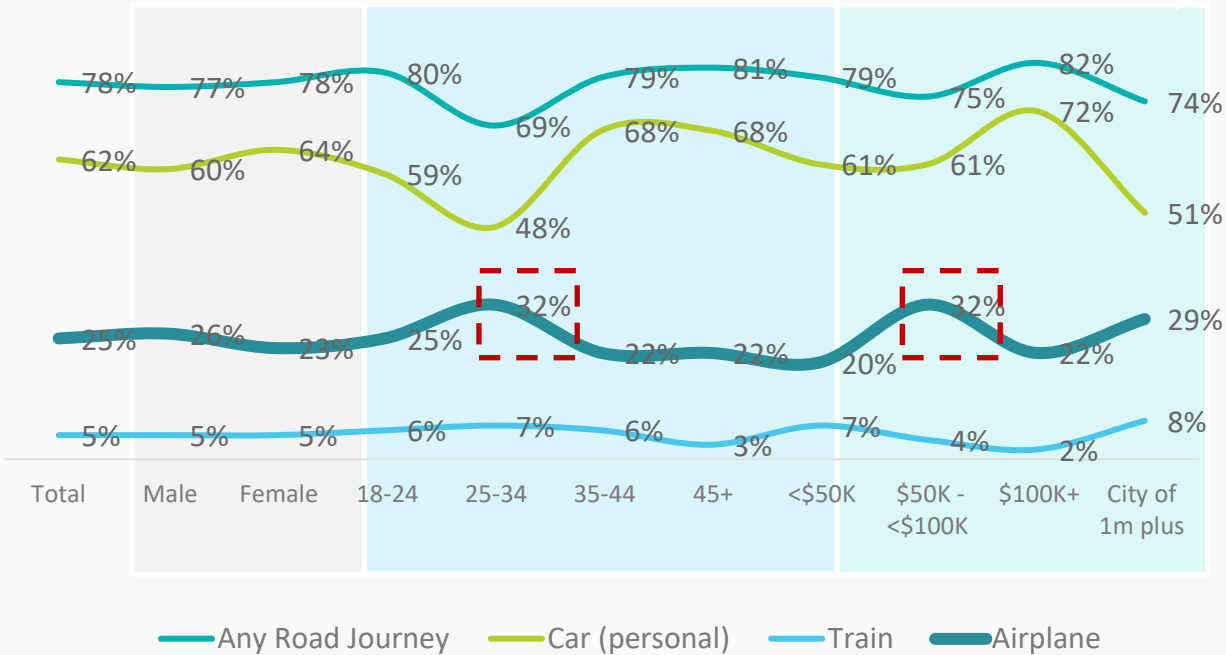
- 78% will engage in some form of 'road journey' (car, rental car, bus or bike).
- This is consistent across all demographics.

What mode of transportation do you plan to use for your summer vacation this year?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

Journeys by air will also take place, but by a much smaller group.

Mode of transport this year.



- 25% planning to fly to destination.
- At 32%, those 25-34 and those earning \$50-\$99k a year more likely to use this form of transport.

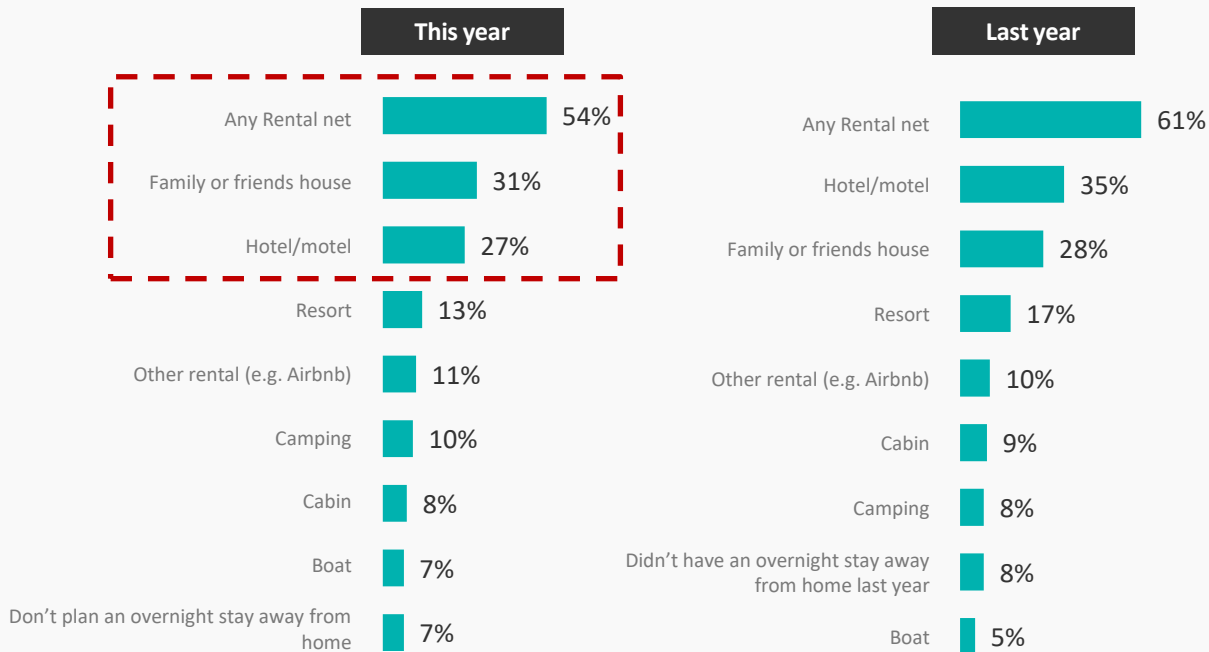
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▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

54% will rent accommodations, with hotel/motels the most favored paid accommodation.

Accommodation plans....



What type of accommodation/s do you plan to use/stay in?/What accommodations did you use last year?

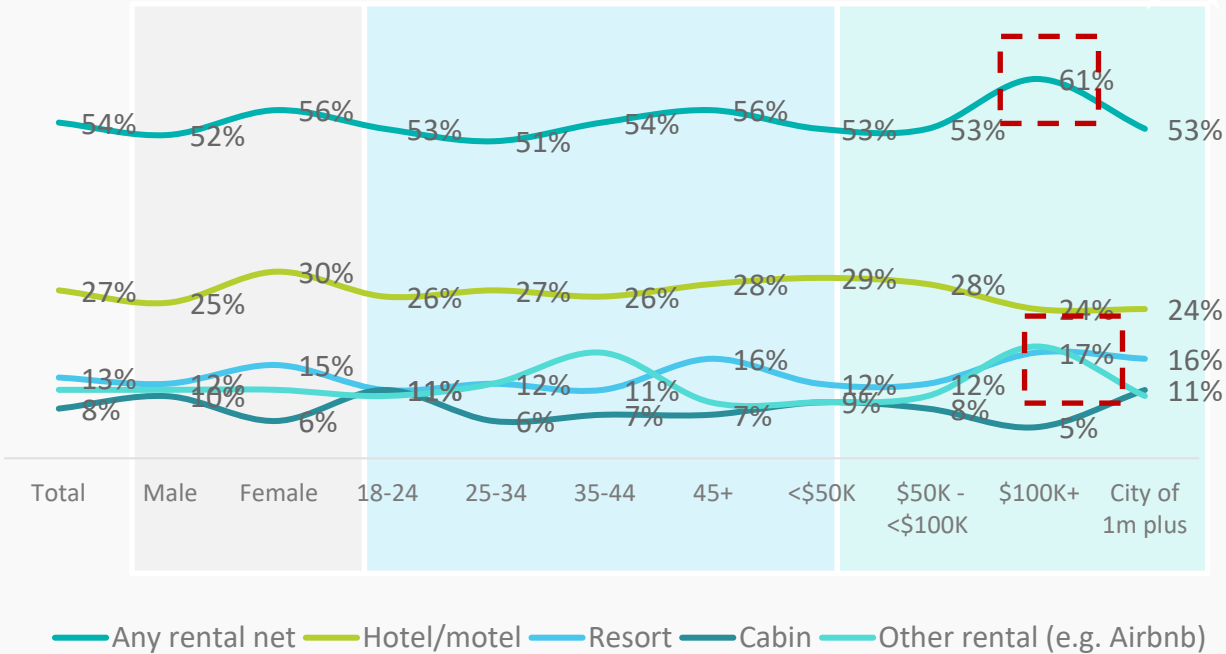
Base: All who plan summer vacation: Total sample (532)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Overall 54% will be paying for accommodation.
- At 27%, it is hotel/motel that is the most favored rental accommodation.
- 31% will stay with family or friends.

Hotel/motel is the favored rented accommodation types across all demographics.

Accommodation plans this year.



- At 61%, those on higher income are more likely to be staying in rented accommodations.
- However, while they will still use hotels/motels, they are more likely than others to stay at a resort or use other rental services such as Airbnb.

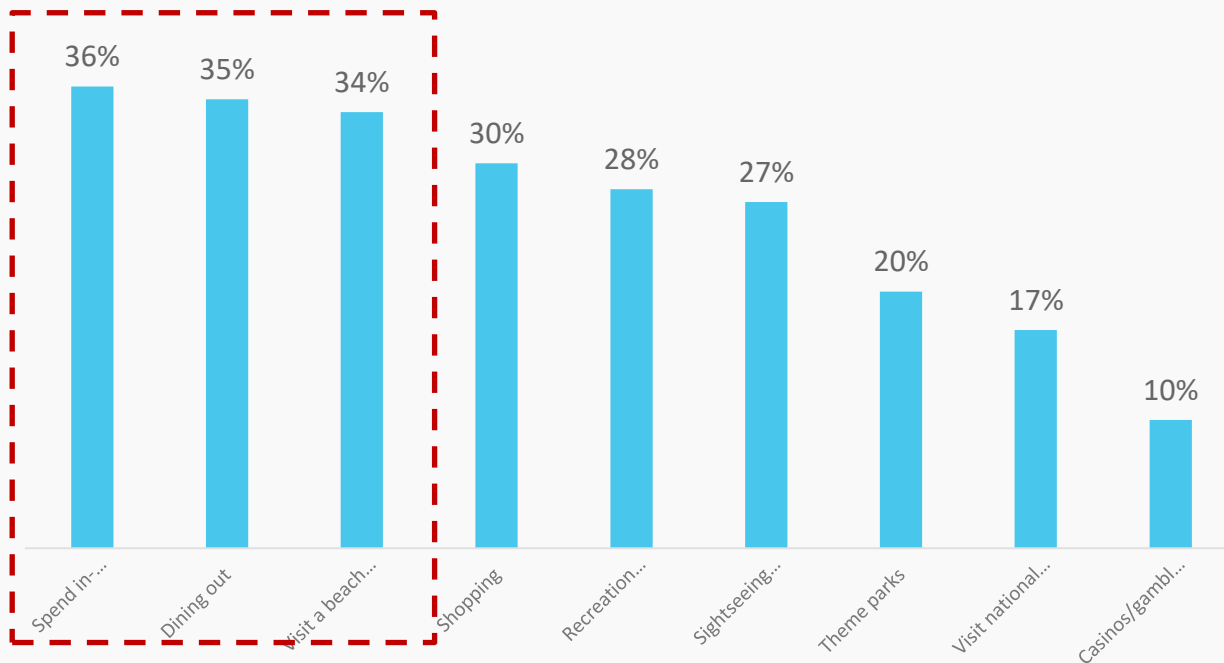
What mode of transportation do you plan to use for your summer vacation this year?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Time with family/friends (36%), dining out (35%) and visiting beach/lake (34%) are the primary activities planned.

Activities planned.



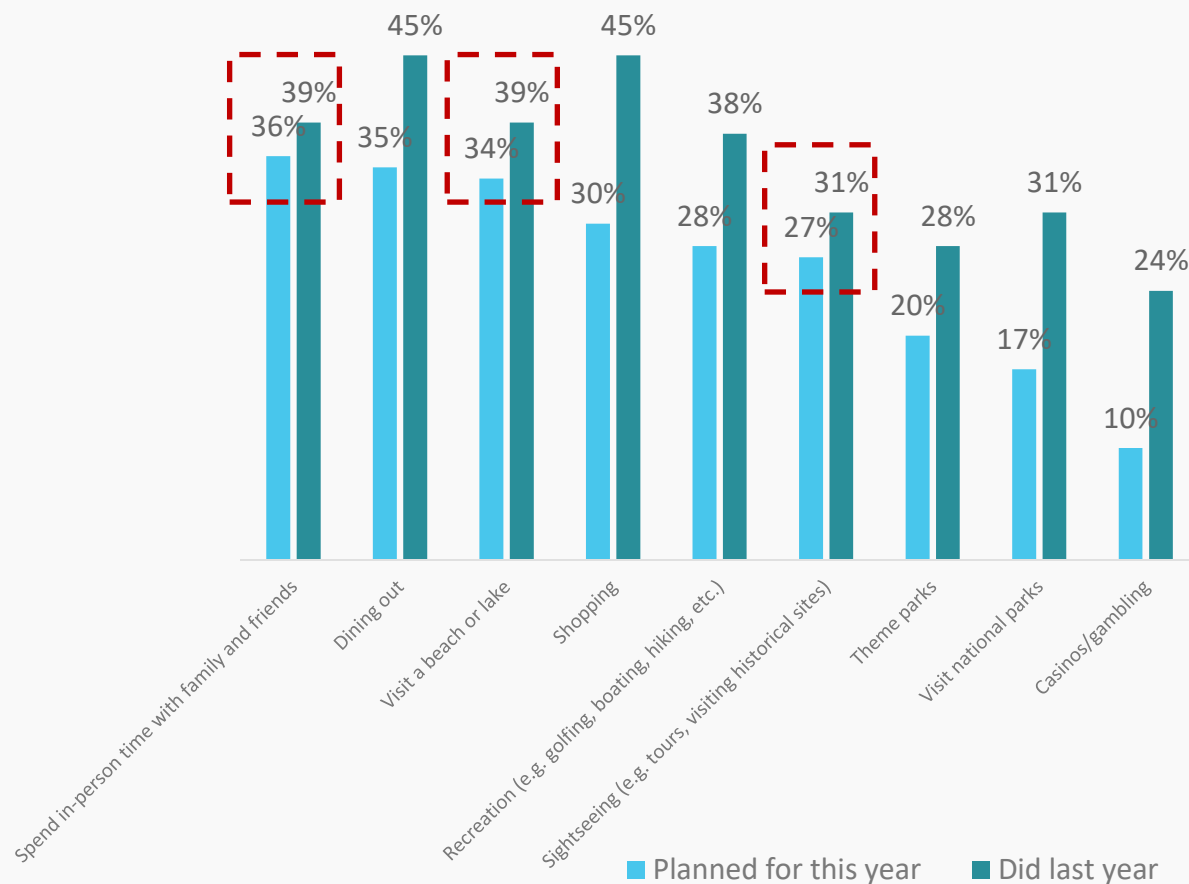
What activities do you plan to incorporate in your summer vacation?

Base: All who plan summer vacation: Total sample (532)

- Shopping is also planned (30%), along with other recreational activities (28%).
- 27% plan to take in the sights.

Change in planned activities this summer versus last shows some changes among activities with greater social contact.

Activities planned this year versus last year.



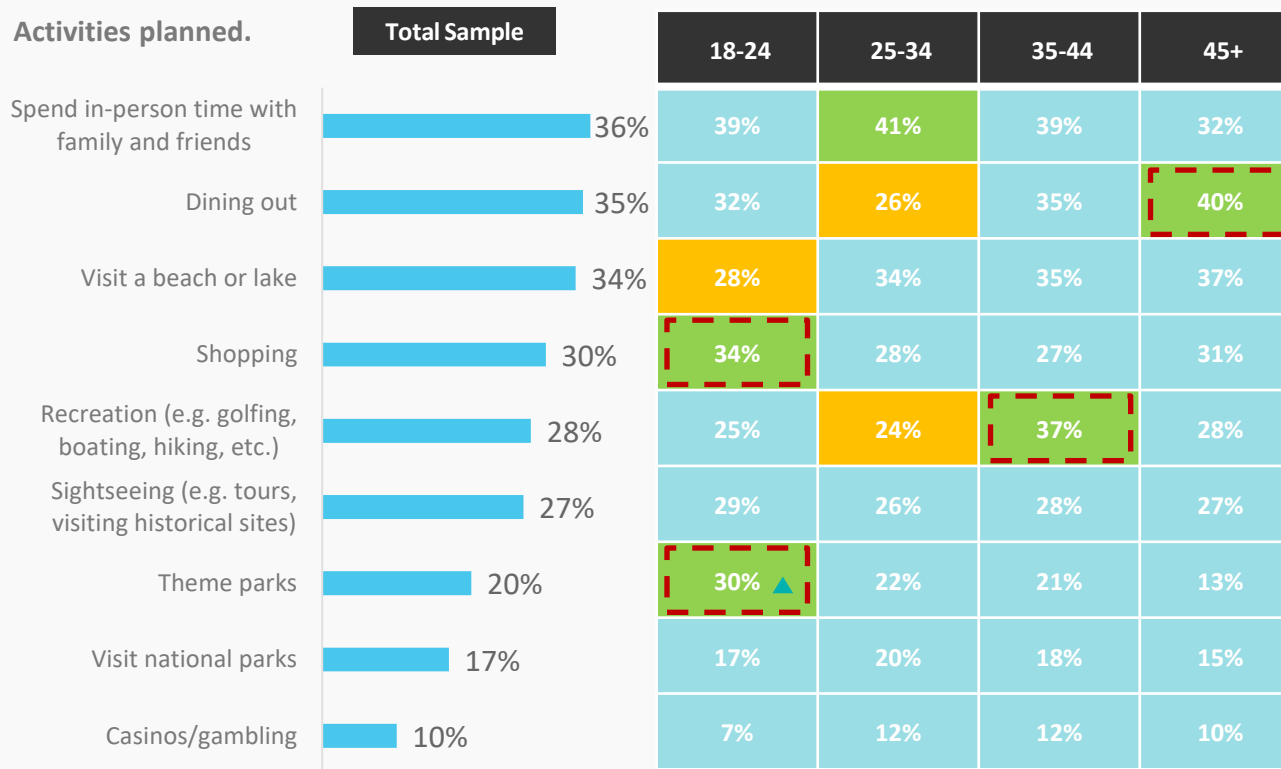
What activities do you plan to incorporate in your summer vacation?

Base: All who plan summer vacation: Total sample (532)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Spending time with family/friends, visiting a beach/lake and sightseeing are activities that have remained relatively unchanged year on year.
- Activities that involve greater social contact are the ones that have been reduced – shopping, general recreation, theme parks, national parks and casinos.

Planned activities differ by age.



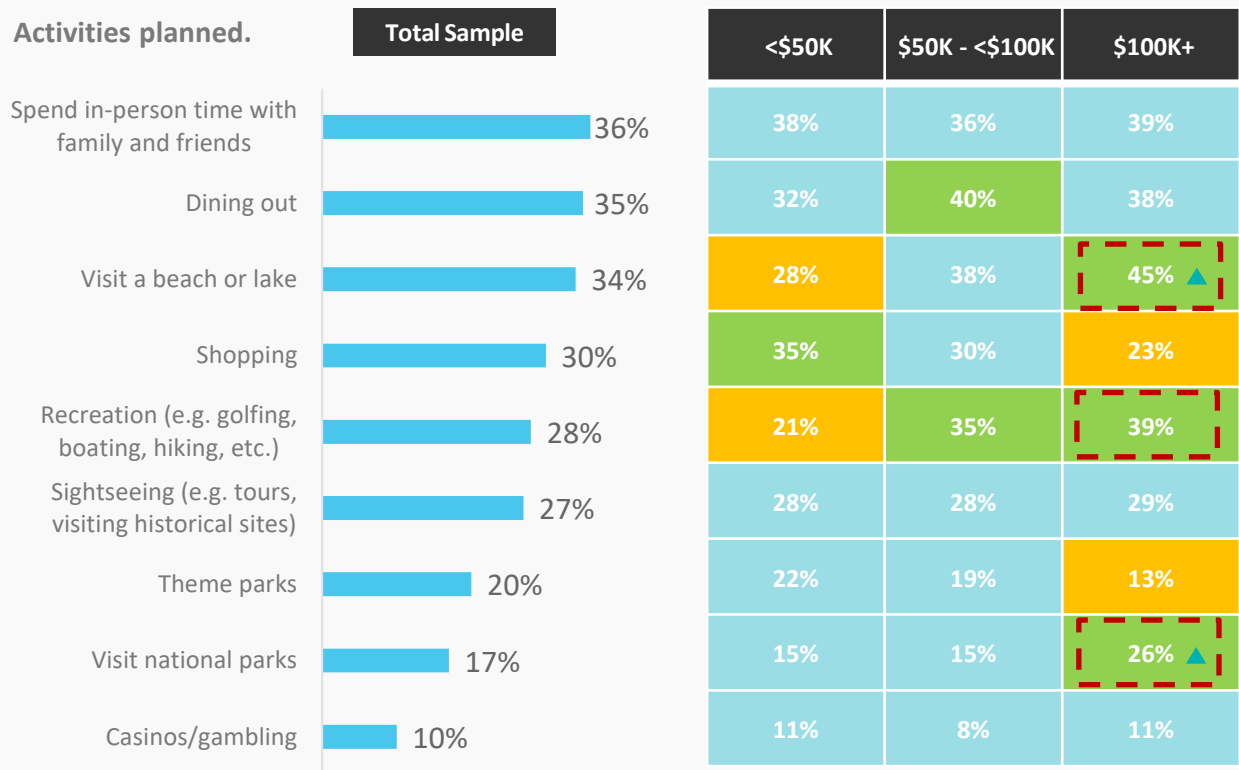
What activities do you plan to incorporate in your summer vacation?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- 18-24's are more likely to include shopping in this years vacation, and are significantly more likely to incorporate a visit to a theme park.
- Those 35-44 are more likely to include general recreation activities into this years break.
- While 45 plus have the greatest interest in dining out.

High income consumers are significantly more likely to visit beaches/lakes and national parks.



What activities do you plan to incorporate in your summer vacation?

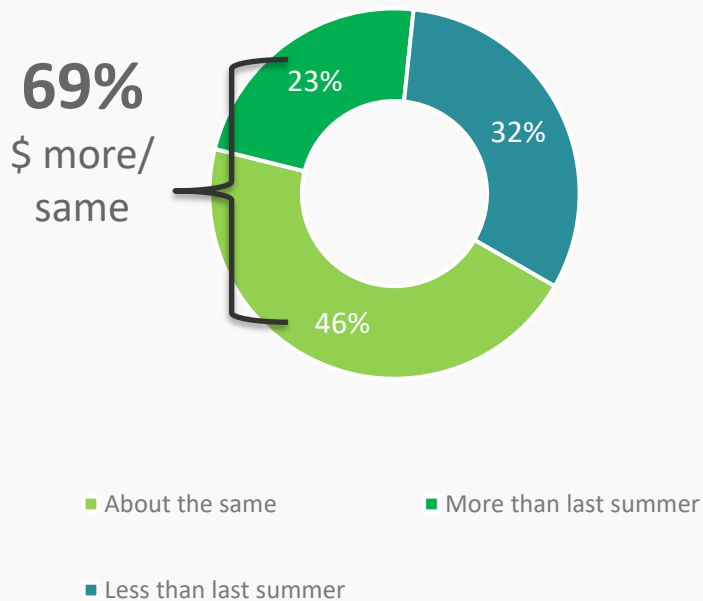
Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- General recreation also features for this group.

69% plan to spend the same or more than last year on vacation.

Planned spend versus last year.



	Same	More
Male	48%	24%
Female	43%	21%
18-24	34%	36%
25-34	44%	25%
35-44	50%	22%
45+	50%	16%
<\$50K	45%	26%
\$50K - <\$100K	46%	23%
\$100K+	46%	18%
Live in city of over 1m	40%	30%
Live in city 1m or less	48%	19%

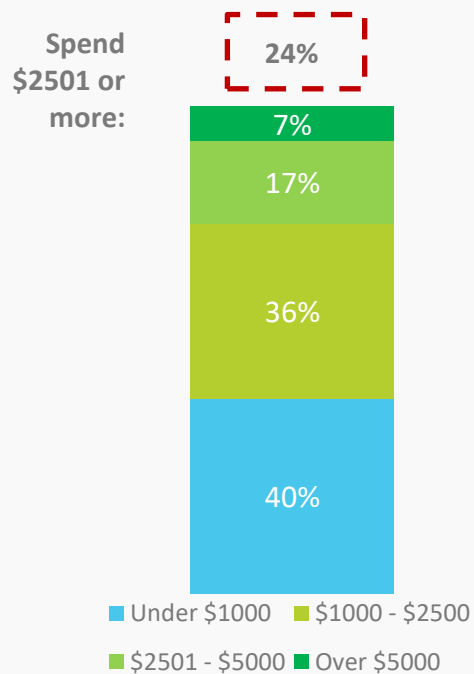
- 46% said that their spend for this years summer vacation will be the about the same as last year.
- 23% plan to spend more this year than last.
- 18-25's and those from a big city are more likely to spend more this year.

Do you intend to spend more or less on this years summer vacation versus last years?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

24% have budgeted to spend over \$2500 for this year's summer vacation.

Actual spend.



	\$2501 or more
Male	29%
Female	20%
18-24	27%
25-34	26%
35-44	22%
45+	24%
<\$50K	23%
\$50K - <\$100K	20%
\$100K+	38% ▲
Live in city of over 1m	30%
Live in city 1m or less	22%

- Those with higher income are significantly more likely to spend this amount or more.

How much do you plan to spend during your summer vacation?

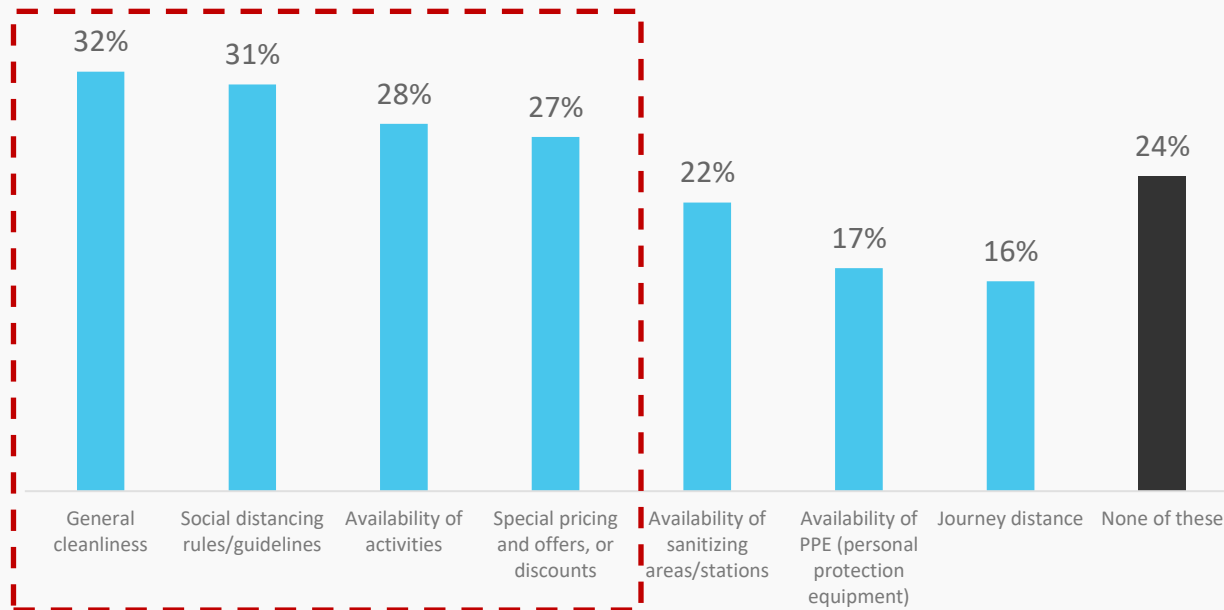
Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Summer vacation – key
communications messages.

General cleanliness (32%) and social distancing rules (31%) are the primary messages of reassurance for consumers.

Communications message and information.



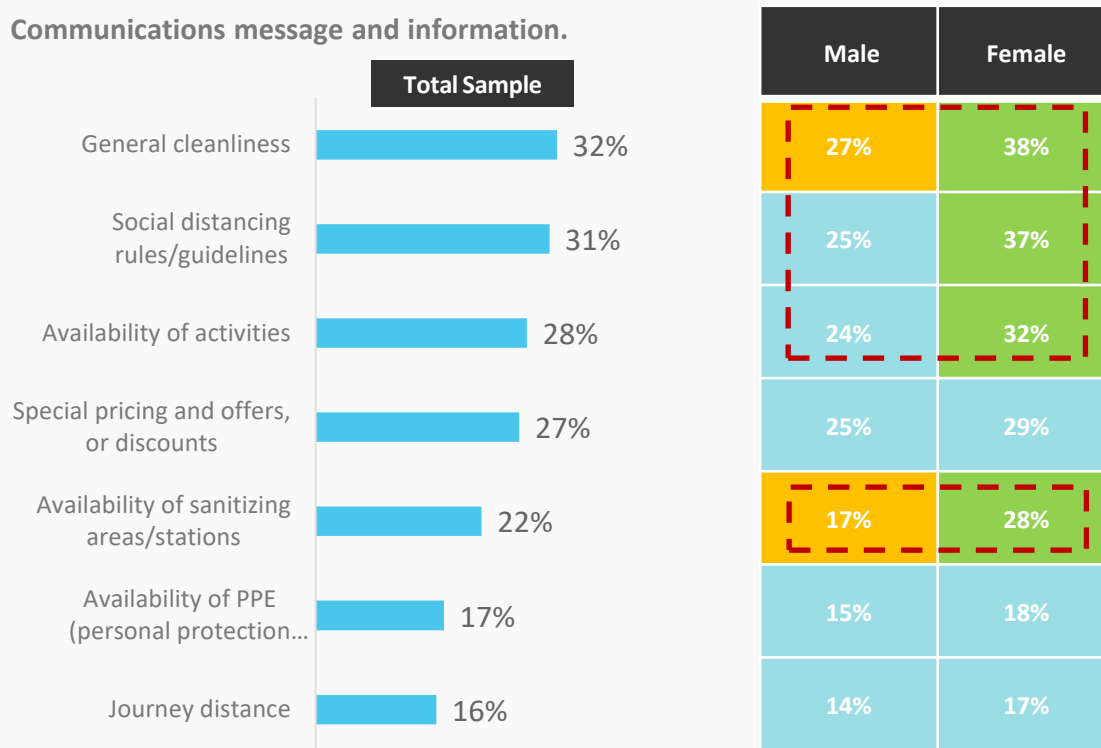
And now we'd like you to think about the type of messages and information that you would like to hear and know about when selecting the location for summer break. Which of the following would you like to hear/know about when selecting a summer break location?

Base: All who plan summer vacation: Total sample (532)

- This is followed by the availability of activities (28%) and special pricing/discounts (27%).

Clear indications that these messages are much more pertinent for females.

Communications message and information.



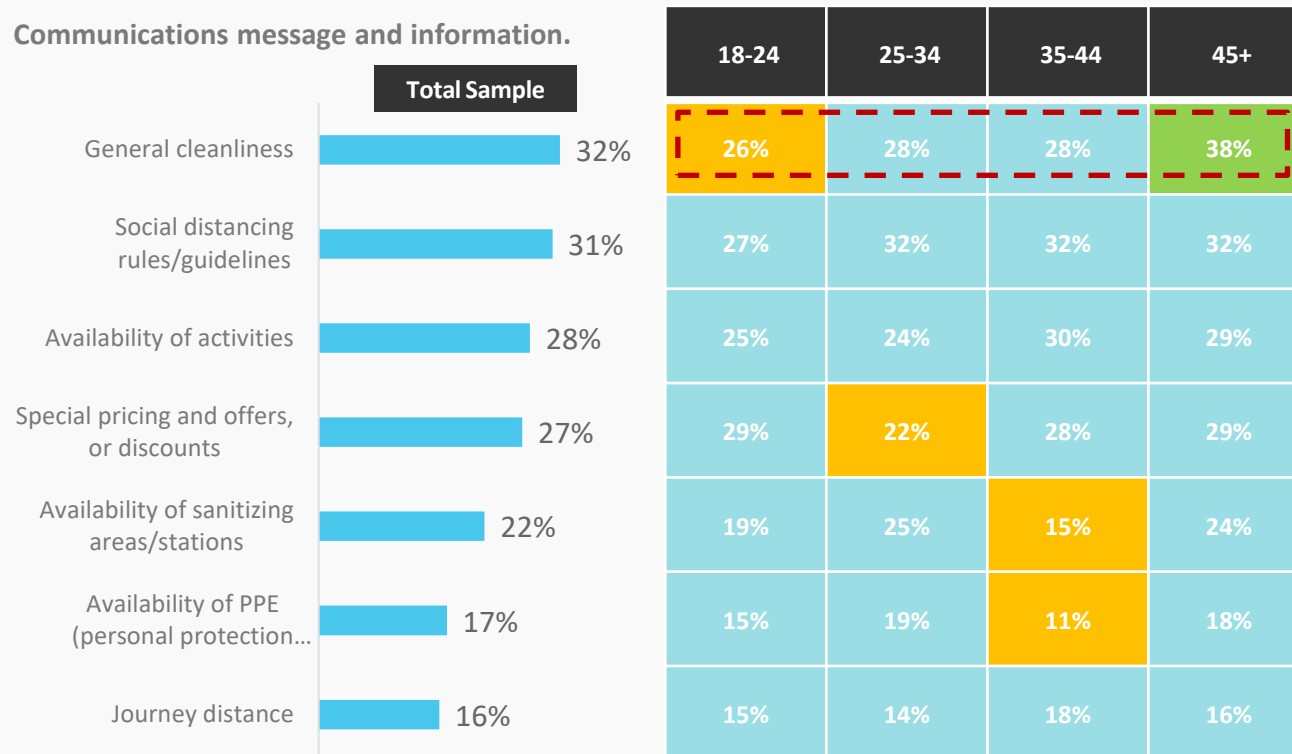
And now we'd like you to think about the type of messages and information that you would like to hear and know about when selecting the location for summer break. Which of the following would you like to hear/know about when selecting a summer break location?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249)

- Females consistently endorse messages of; General cleanliness, social distancing rules and available activities more than males.
- Availability of sanitizing areas is also more pertinent to this group.

For those 45 plus, the general cleanliness message is considerably more important.

Communications message and information.



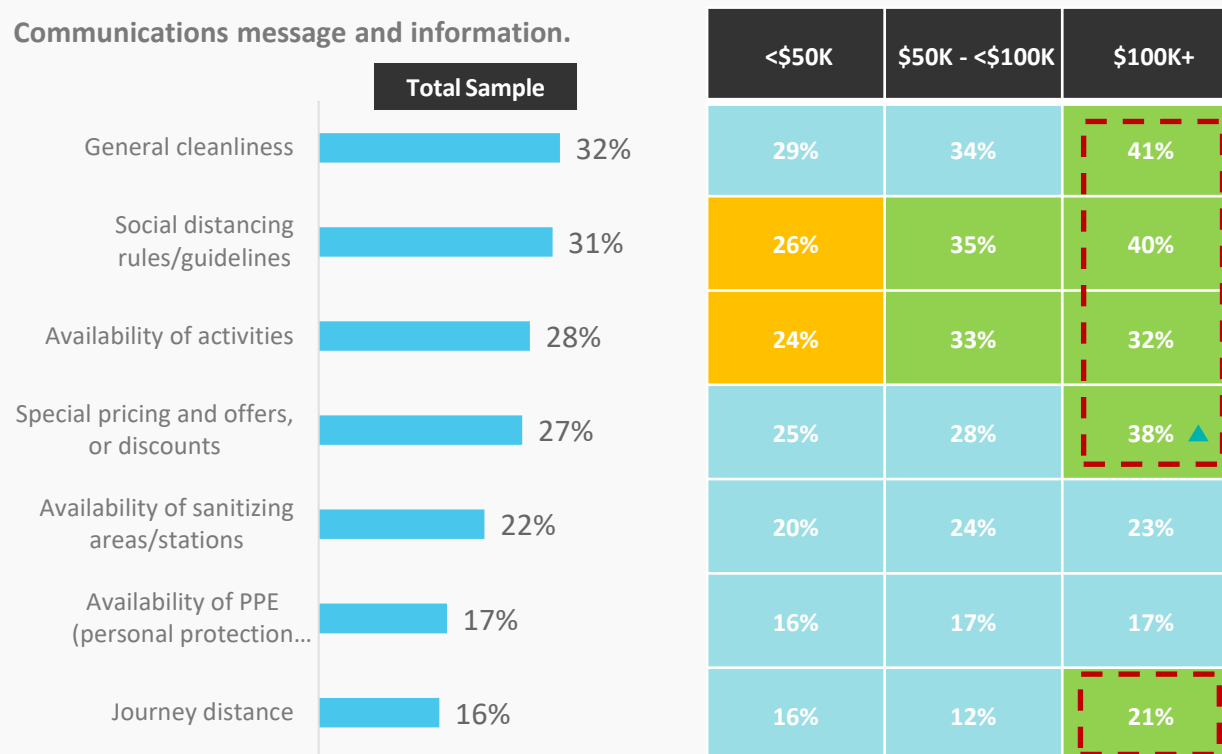
And now we'd like you to think about the type of messages and information that you would like to hear and know about when selecting the location for summer break. Which of the following would you like to hear/know about when selecting a summer break location?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

High income consumers consider key segments of information more important than others.

Communications message and information.



And now we'd like you to think about the type of messages and information that you would like to hear and know about when selecting the location for summer break. Which of the following would you like to hear/know about when selecting a summer break location?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

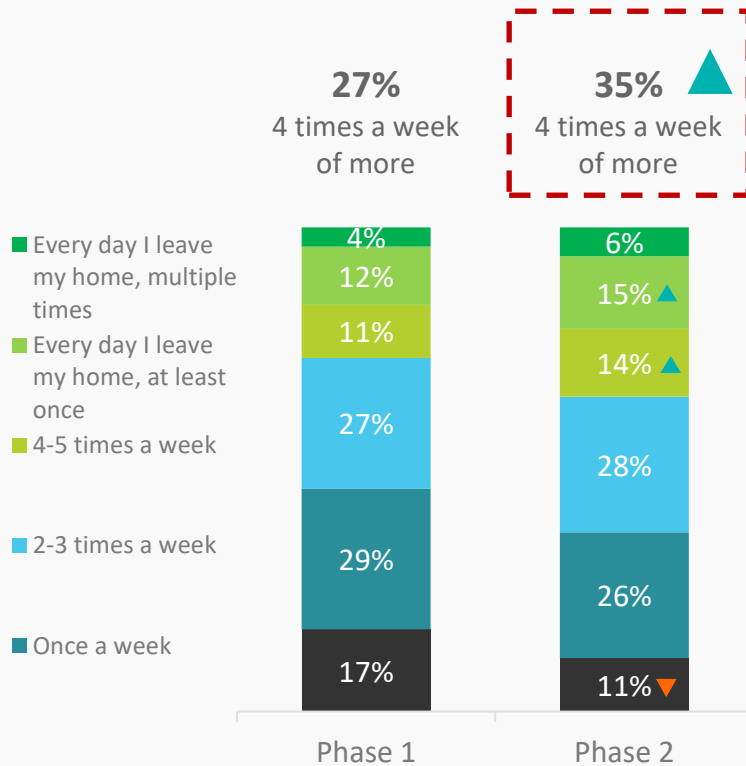
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Messages of general cleanliness, rules of social distancing, activities and special pricing are more strongly demanded by these consumers.
- As to is information around the journey distance.

Appendix

How frequently are people leaving home?

More consumers are now leaving home.



4 times a week of more	Phase 1	Phase 2
Male	33%	42% ▲
Female	20%	28% ▲
18-24	20%	28% ▲
25-34	31%	30%
35-44	26%	44% ▲
45+	28%	36% ▲
<\$50K	26%	31% ▲
\$50K - <\$100K	29%	37% ▲
\$100K+	29%	47% ▲

- While there are some differences between the sample in both phases, we do see a considerable increase in the % of consumers leaving home 4 times a week or more.
- This increase is evident across nearly all demographic groups.

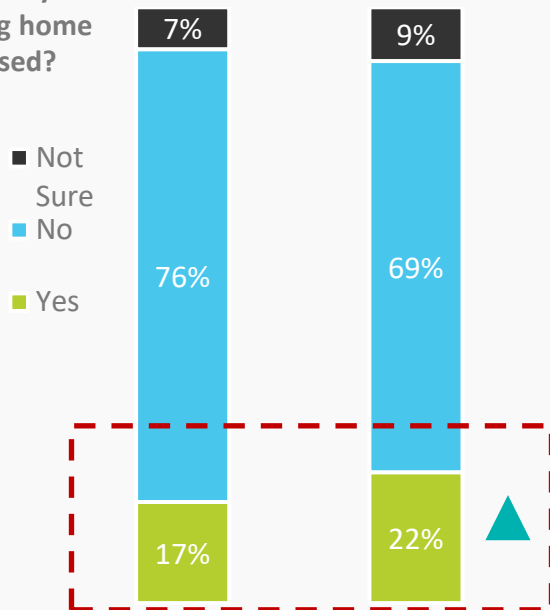
Thinking about the last few weeks, how often are you leaving your home in an average week?

Base: Total sample (1000/1000), Male (490/500), Female (510/500), 18-24 (260/170), 25-34 (246/170), 35-44 (218/160), 45 plus (276/500), Less than 50k (519/446), 50 to 100k (263/306), 100k plus (123/153)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

The frequency of leaving home has also increased.

Frequency of leaving home increased?



	Yes	Phase 1	Phase 2
Male		19%	21%
Female		15%	23%
18-24		24%	20%
25-34		25%	24%
35-44		13%	27% ▲
45+		8%	20% ▲
<\$50K		17%	21%
\$50K - <\$100K		20%	22%
\$100K+		14%	22%

- 22% state they are now leaving home more frequently.

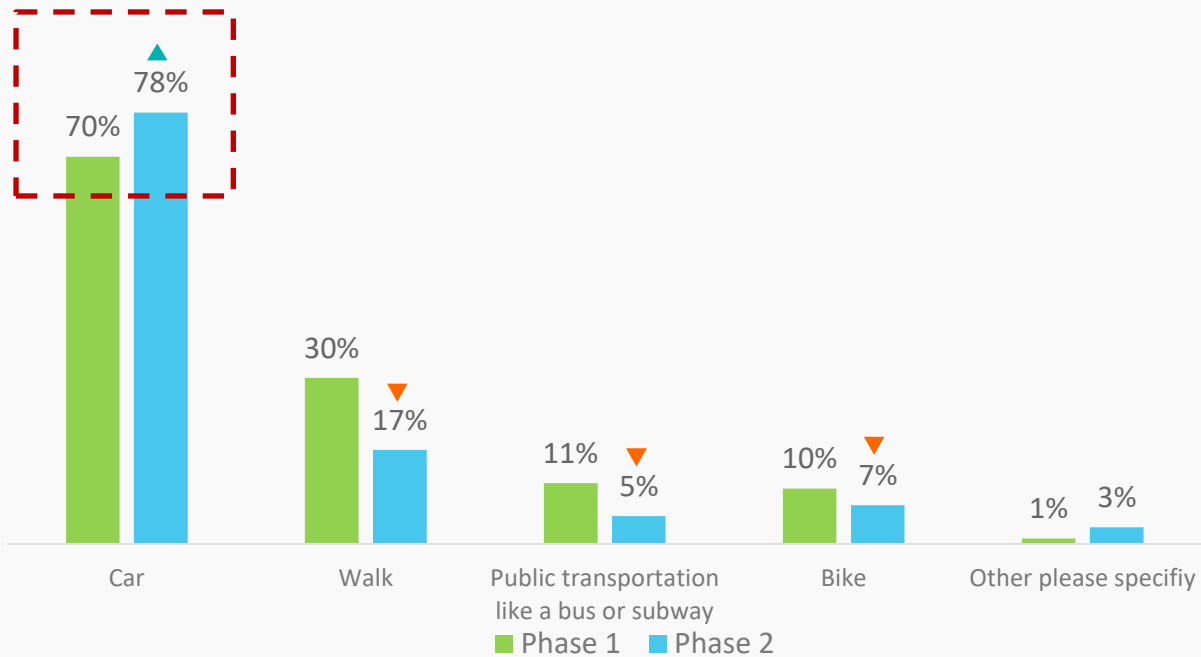
And has the frequency of you leaving your home in the last few weeks increased?

Base: Total sample (1000/1000), Male (490/500), Female (510/500), 18-24 (260/170), 25-34 (246/170), 35-44 (218/160), 45 plus (276/500), Less than 50k (519/446), 50 to 100k (263/306), 100k plus (123/153)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Car remains the primary transportation used for journeys, and usage has increased.

Transportation used.



Thinking about the last few weeks, when you leave your home, which form of transportation do you use most often?

Base: Total sample (1000/1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

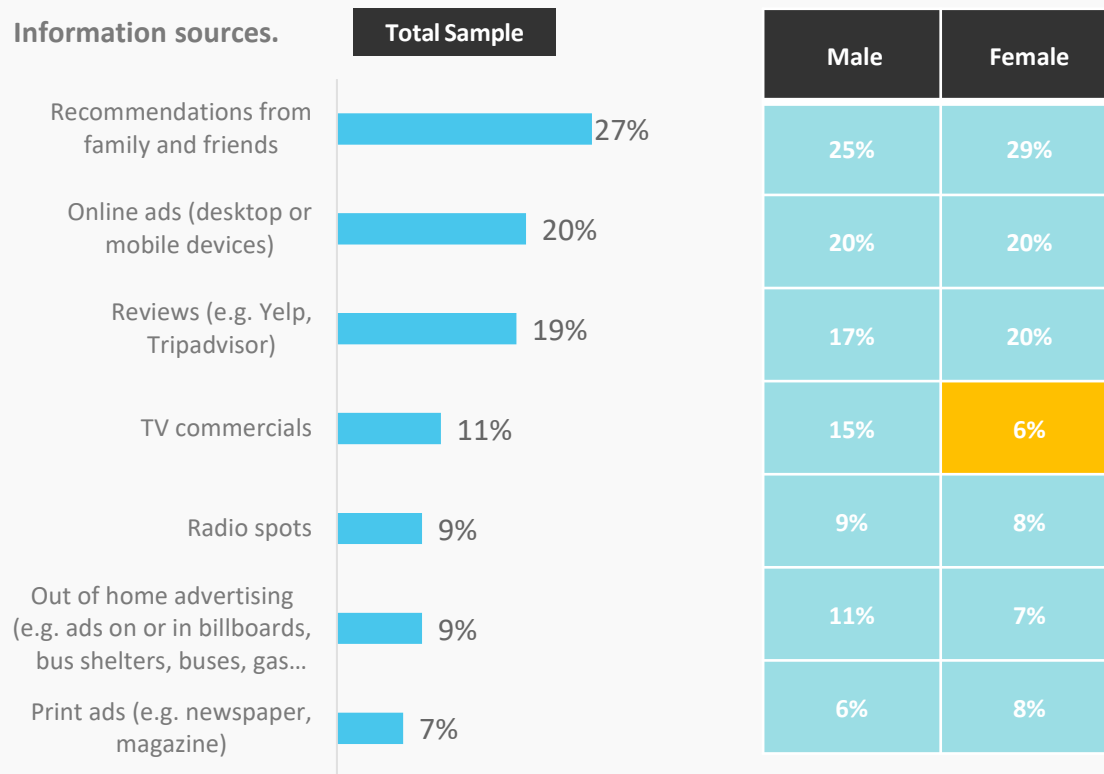
Appendix: Main reason for journey by demographics.

	Male	Female	18-24	25-34	35-44	45 Plus	<\$50K	\$50K - <\$100K	\$100K+
Coronavirus concerns	42%	49%	39%	43%	46%	49%	40%	52%	52%
Concerns about restrictions at or closure of favored destinations	17%	19%	20%	19%	17%	17%	17%	19%	23%
Financial concerns	13%	10%	10%	11%	12%	12%	15%	8%	9%
It just doesn't feel right taking a vacation in these times	12%	10%	14%	11%	11%	9%	14%	9%	8%
Cheap gas prices	5%	4%	7%	7%	4%	2%	5%	5%	2%

What is the main reason for this change?

Base: Those who vacation plans have changed: Total sample (792), Male (374), Female (418), 18-24 (145), 25-34 (129), 35-44 (121), 45 plus (397), Less than 50k (346), 50 to 100k (242), 100k plus (120)

Appendix: Information source by gender.

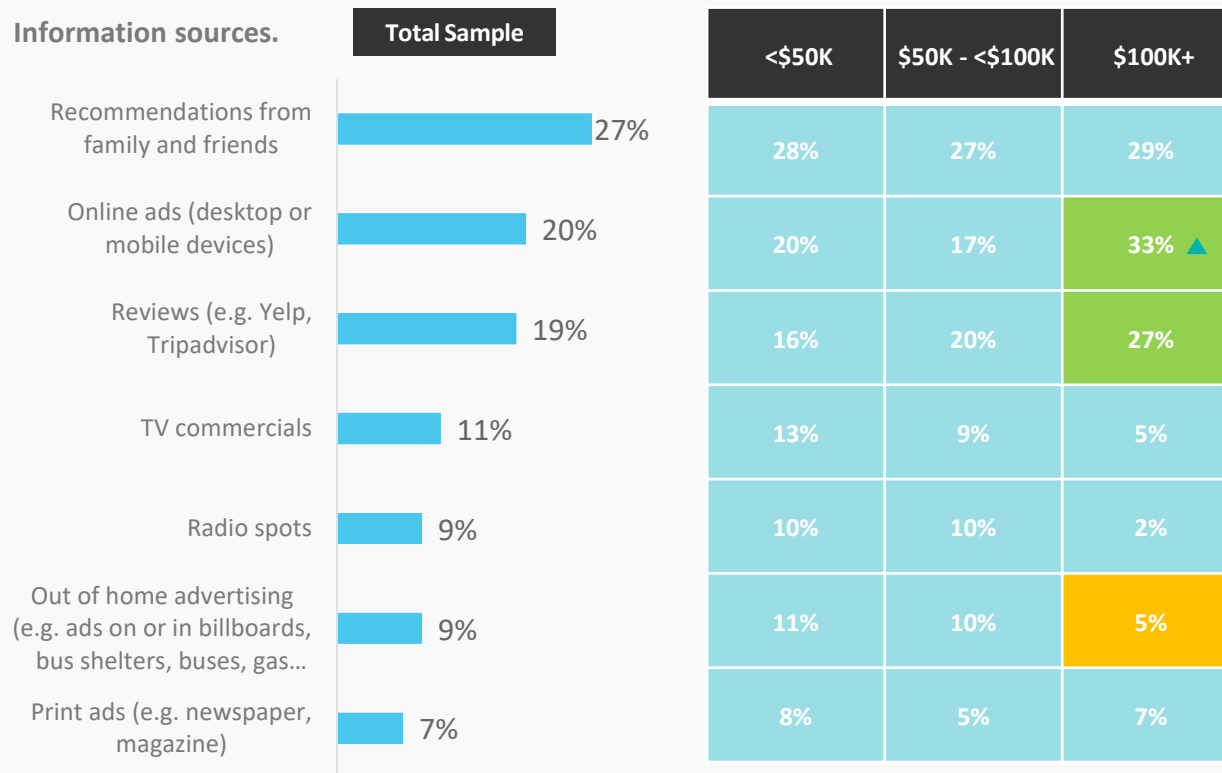


What types of information sources, if any will you use to plan your summer vacation? Please select all that apply

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Appendix: Information source by income.



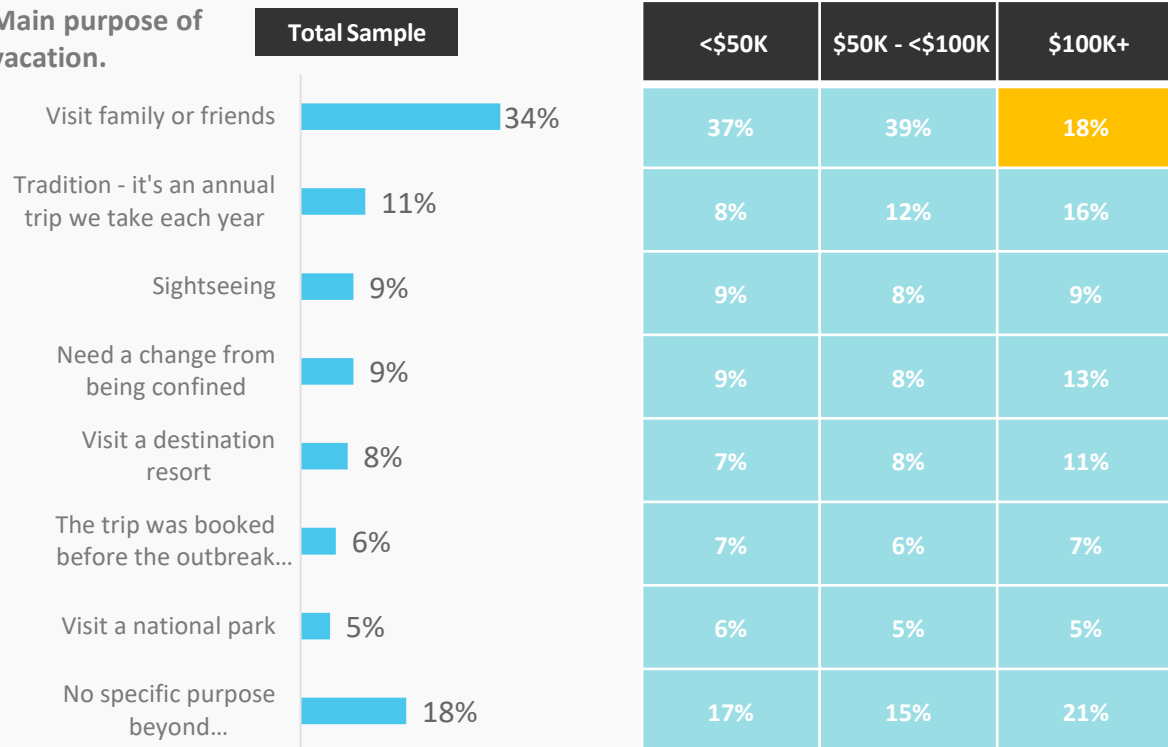
What types of information sources, if any will you use to plan your summer vacation? Please select all that apply

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Appendix: Purpose by income.

Main purpose of vacation.



What is the main purpose of your summer vacation?

Base: All who plan summer vacation: Total sample (532), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval


Appendix: Distance travelled this year v last year.

Distance travelled v last year.

	Total	Northeast	Midwest	South	West
Travelling a longer distance this year	18%	14%	18%	18%	21%
Travelling about the same distance as last year	45%	44%	54%	46%	35%
Travelling a shorter distance this year	37%	42%	28%	36%	44%

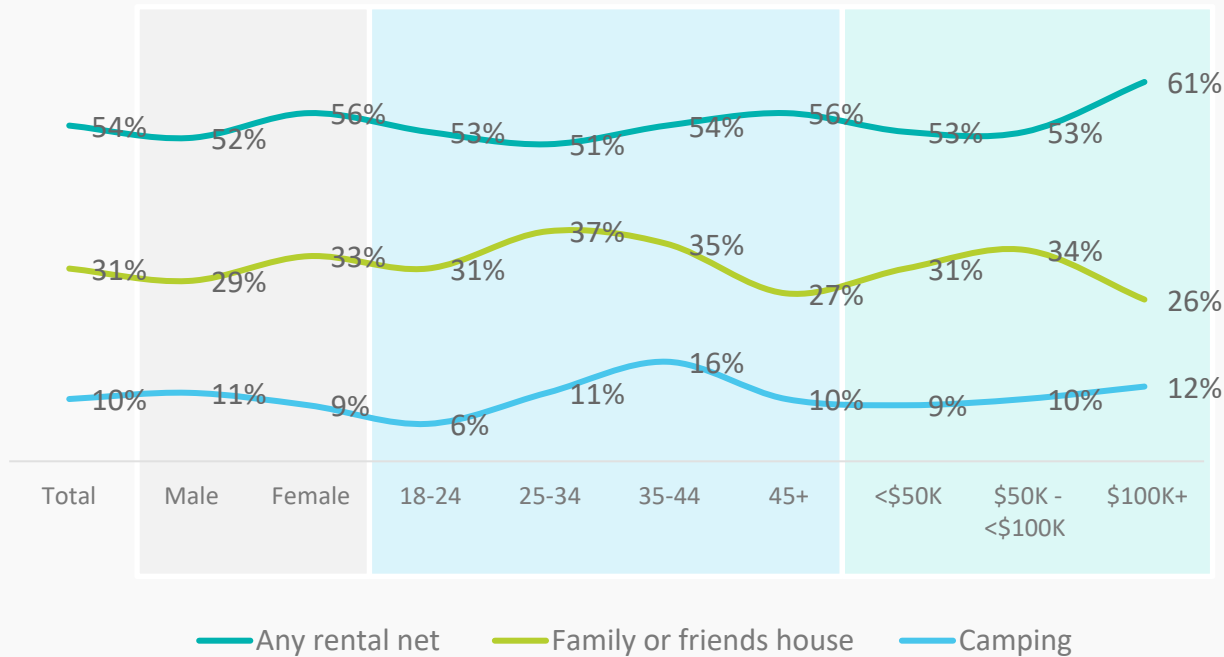
Approximately what distance do you plan to travel to reach your summer vacation destination (one-way)?

Base: All who plan summer vacation: Total sample (532), Northeast (102), Midwest (99), South (208), West (123)

 Significantly higher/lower. Tested at 95% confidence interval

Appendix: Accommodation plans this year.

Accommodation plans this year.

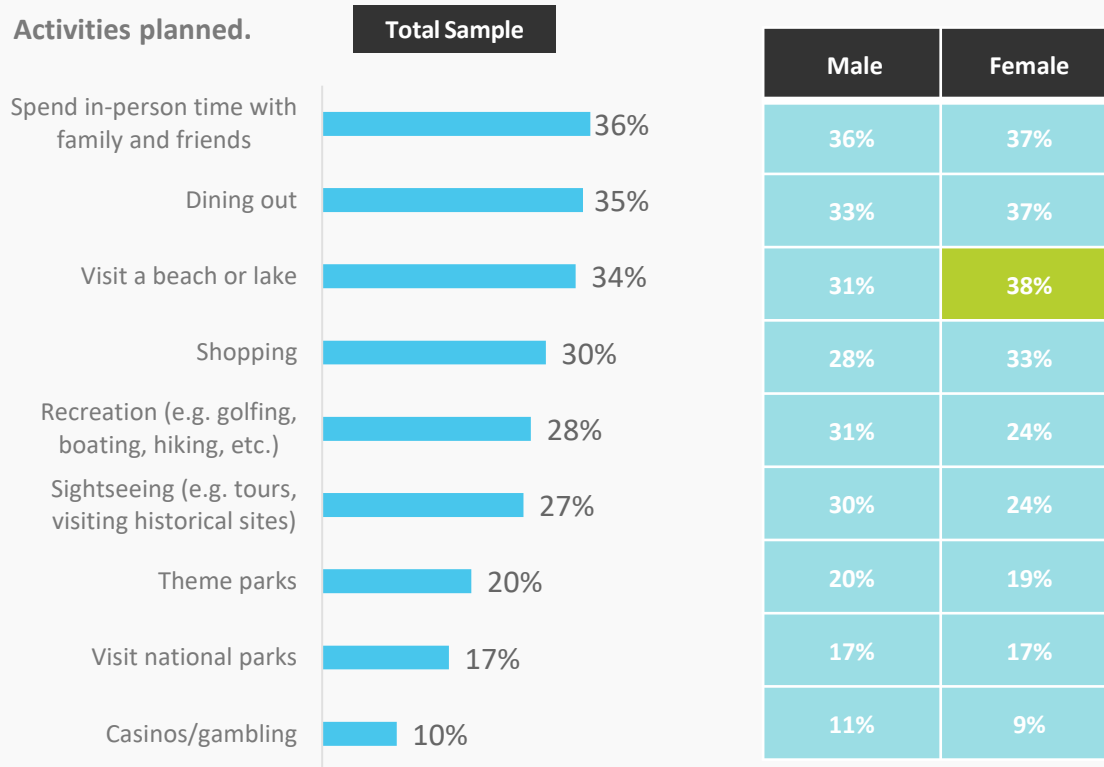


What mode of transportation do you plan to use for your summer vacation this year?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249), 18-24 (108), 25-34 (111), 35-44 (82), 45 plus (231), Less than 50k (243), 50 to 100k (168), 100k plus (82)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Appendix: Activities planned by gender.



What activities do you plan to incorporate in your summer vacation?

Base: All who plan summer vacation: Total sample (532), Male (283), Female (249)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval