



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 33

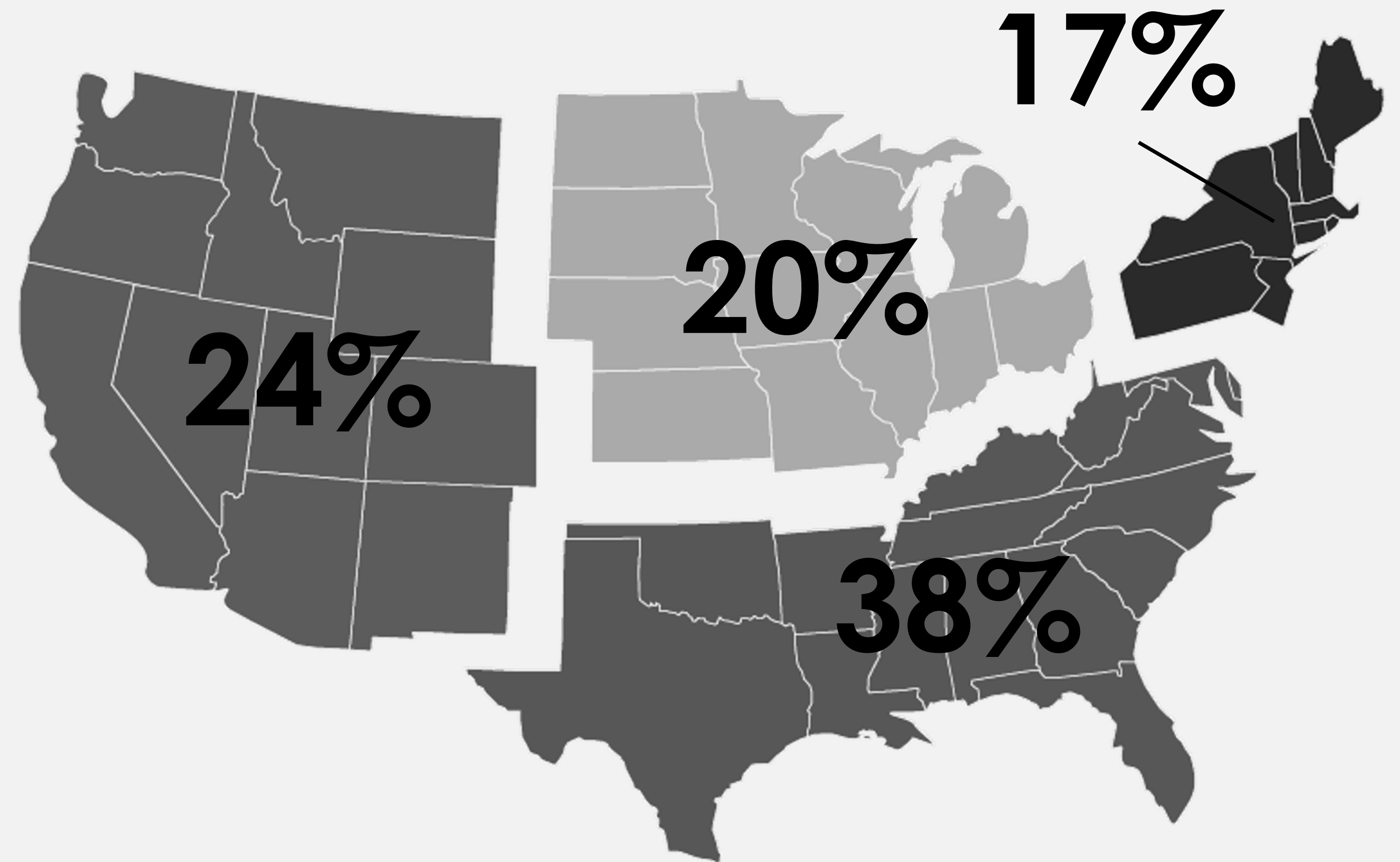
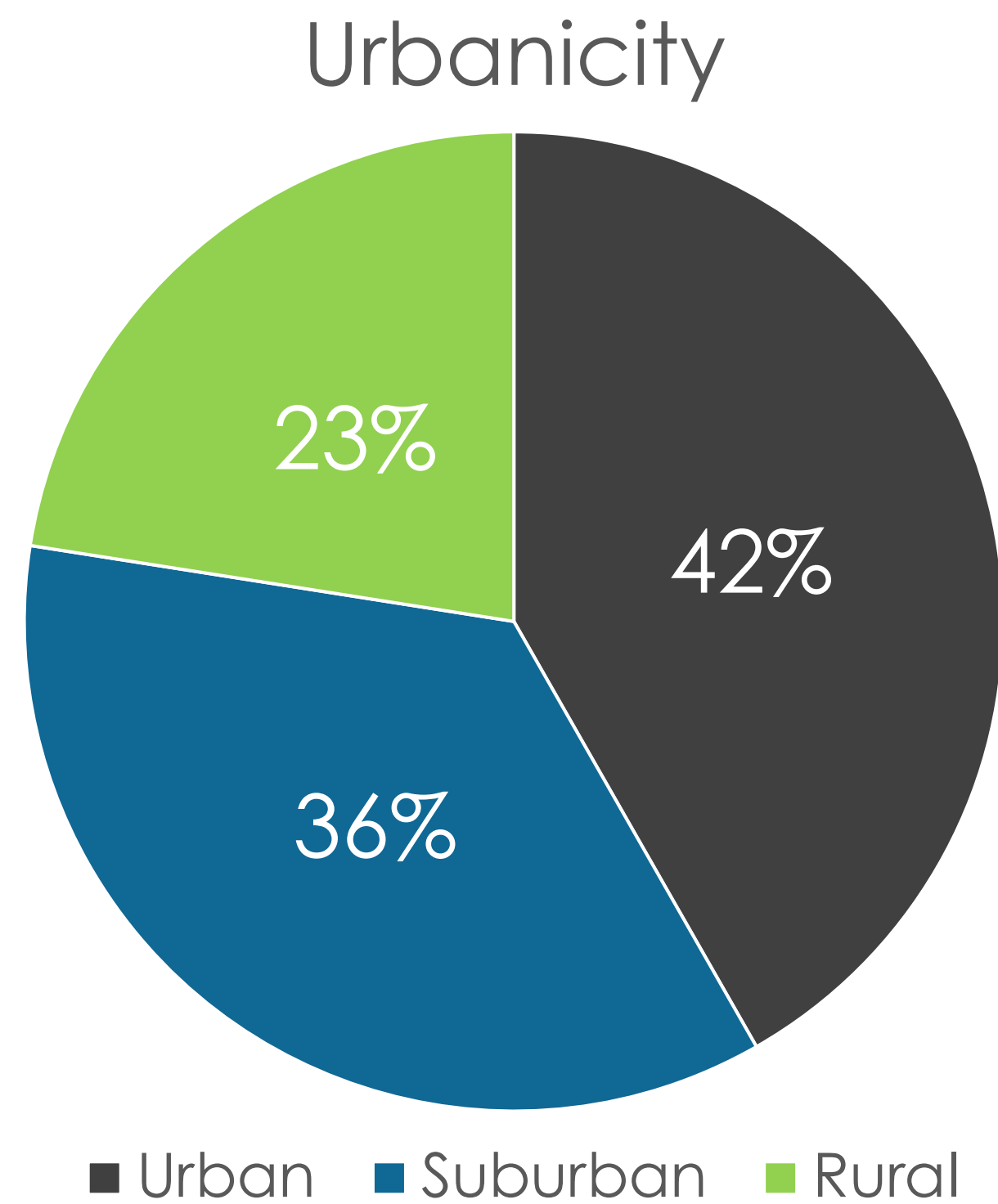
PRESENTED OCTOBER 19, 2020

Methodology

- N = 542
- MOE = $\pm 4.21\%$
- Panel: General Population
- Collected: 10/15/20, 10/16/20

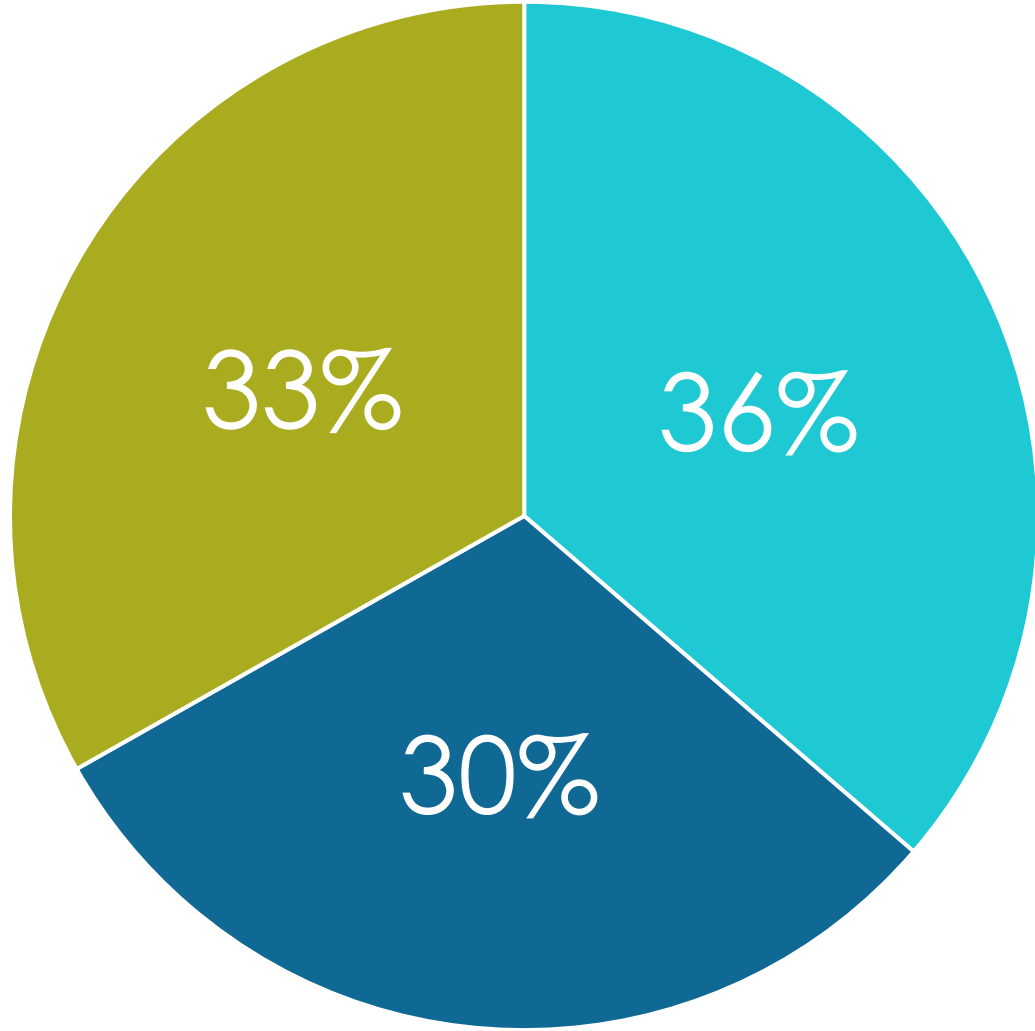


Panel Composition



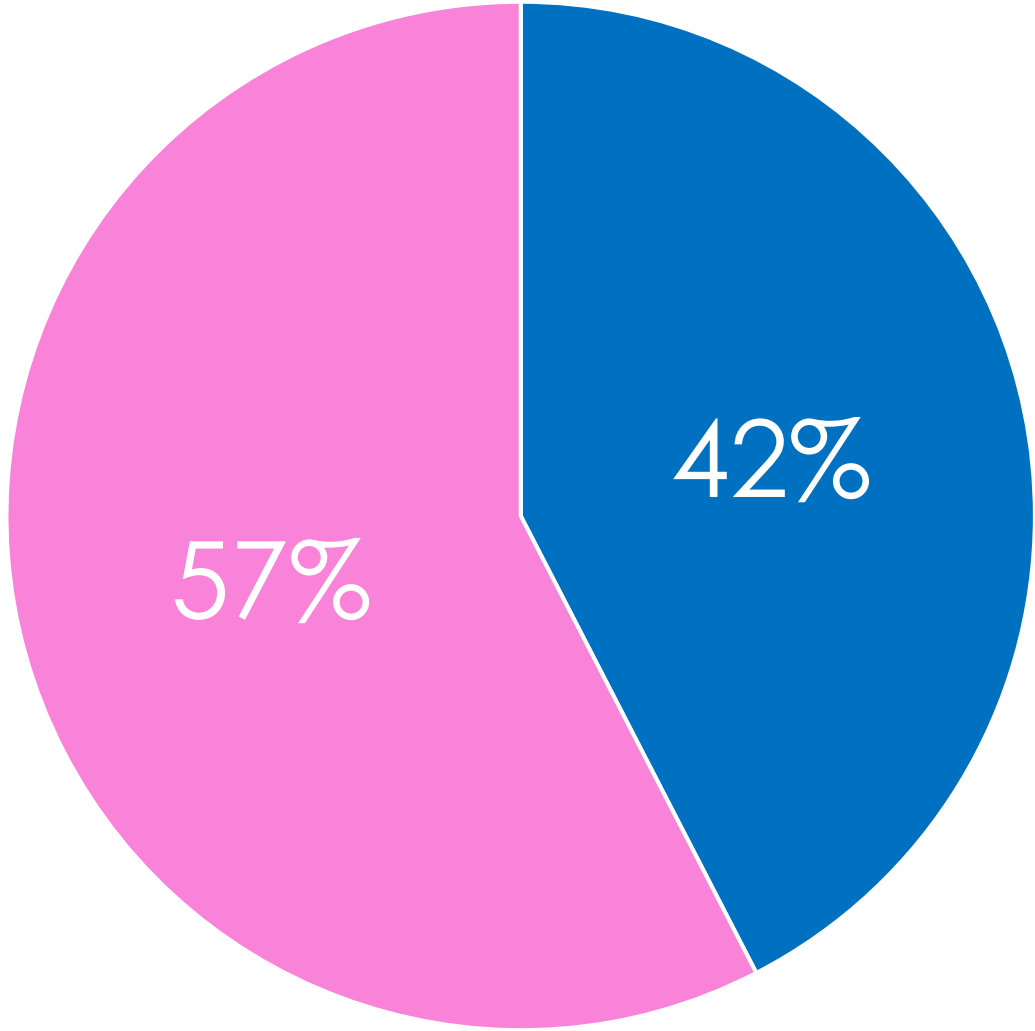


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



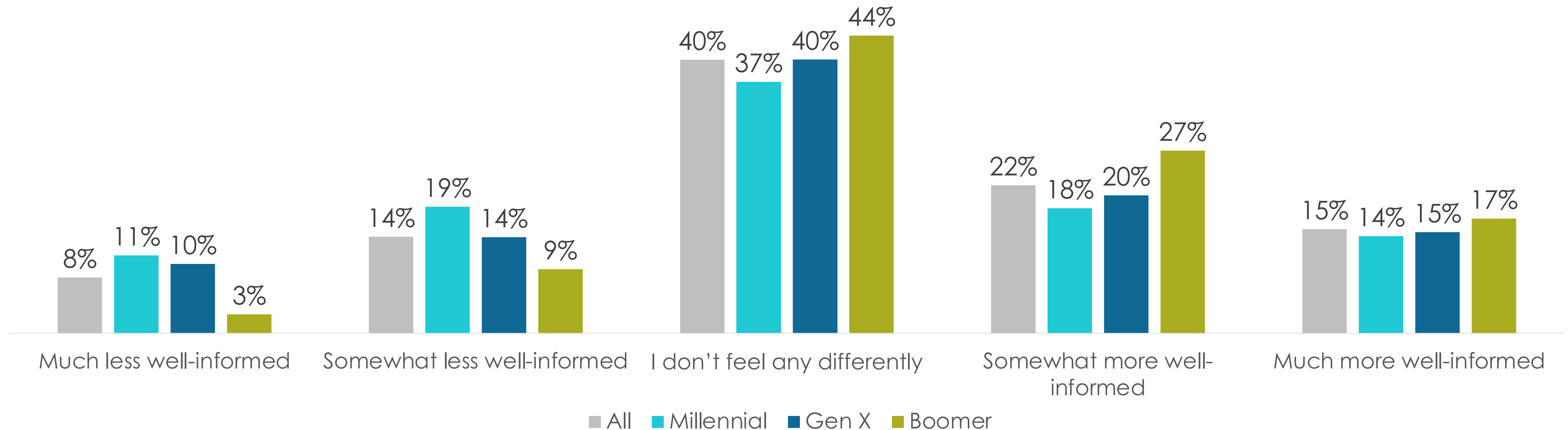
■ Male ■ Female



COVID Hot Topics

Despite the large shift in news reporting from COVID-19 to the election, more people (37%) feel more well-informed about COVID now than they did 2 months ago than those who feel less informed (22%).

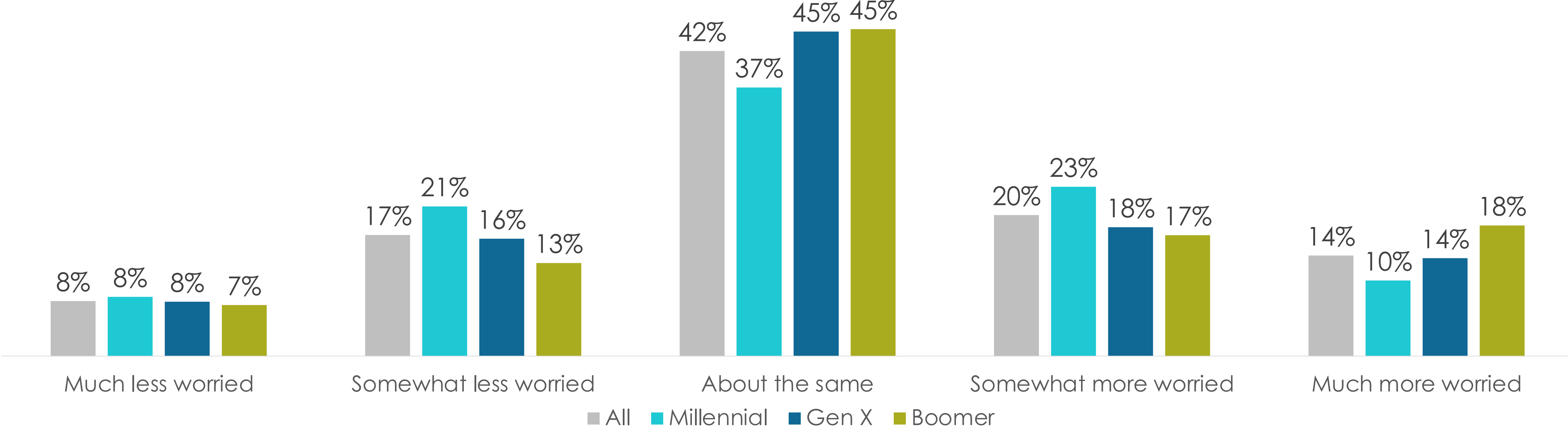
News impact on how well-informed you feel about COVID-19 compared to 2 months ago



The upcoming election has dominated the news of late. How has that impacted how well informed you feel about COVID-19 as compared to two months ago?

The change in information level has contributed to a greater concern about the virus. 34% of respondents are more worried today than two months ago compared to the 25% who are less concerned.

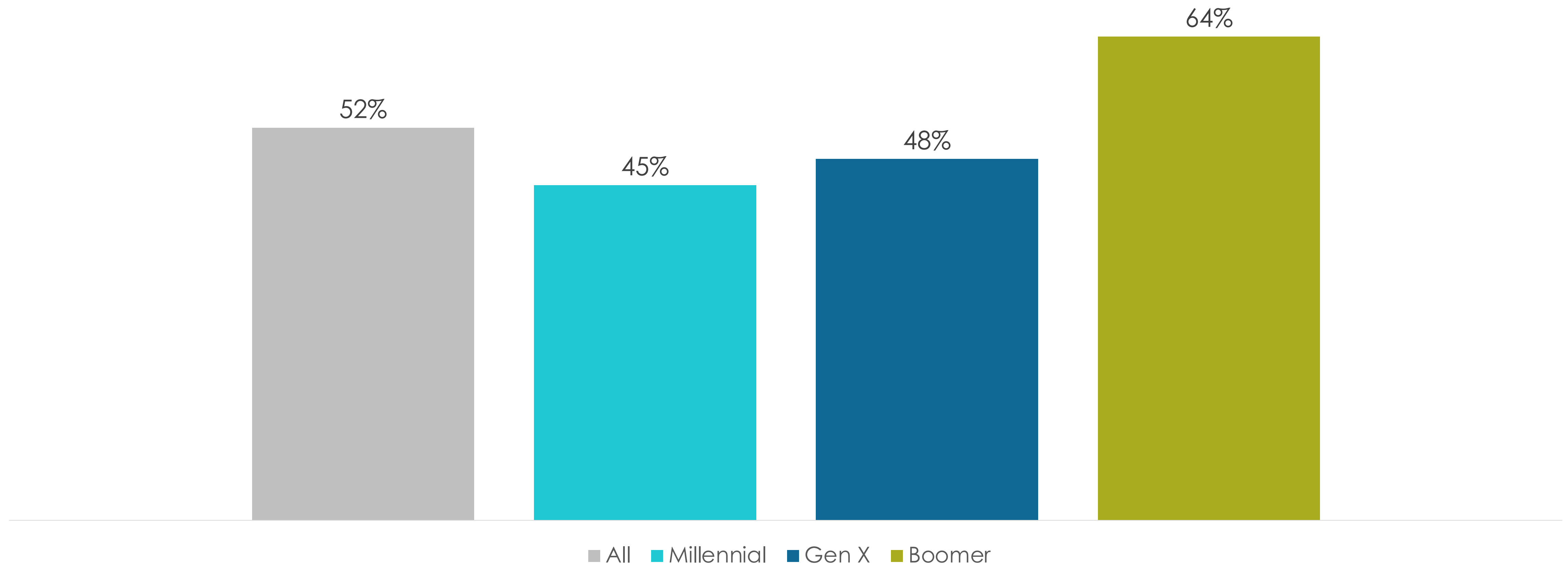
Worry about COVID-19 compared to 2 months ago



How much more or less worried are you about the Coronavirus than you were 2 months ago?

More Boomers (64%) expect an increase in COVID cases over the next few months than do the other generations (Millennials 45%; GenXers 48%).

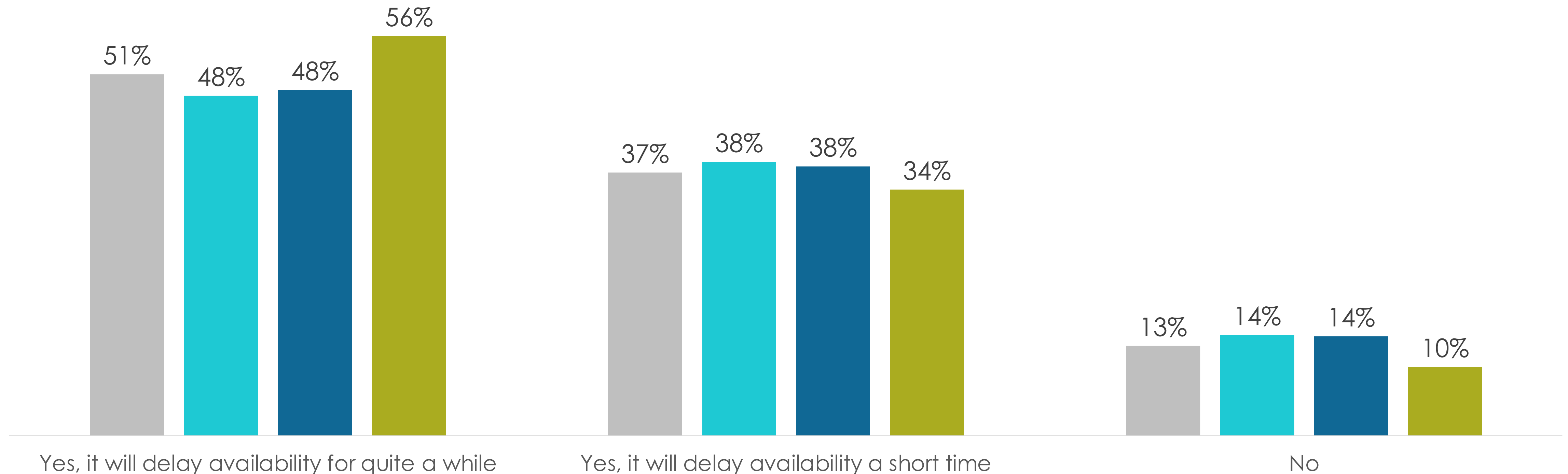
% who think COVID-19 cases will increase in the next few months



Do you expect the number of COVID-19 cases in the U.S. to increase or decrease in the next few months?

The recent news about delays in vaccine trials because of potentially adverse reactions have 88% of respondents thinking vaccine availability will be delayed. More than half (51%) feel the delay will be extensive.

Will vaccine trial delays affect how long it will take to get them to market

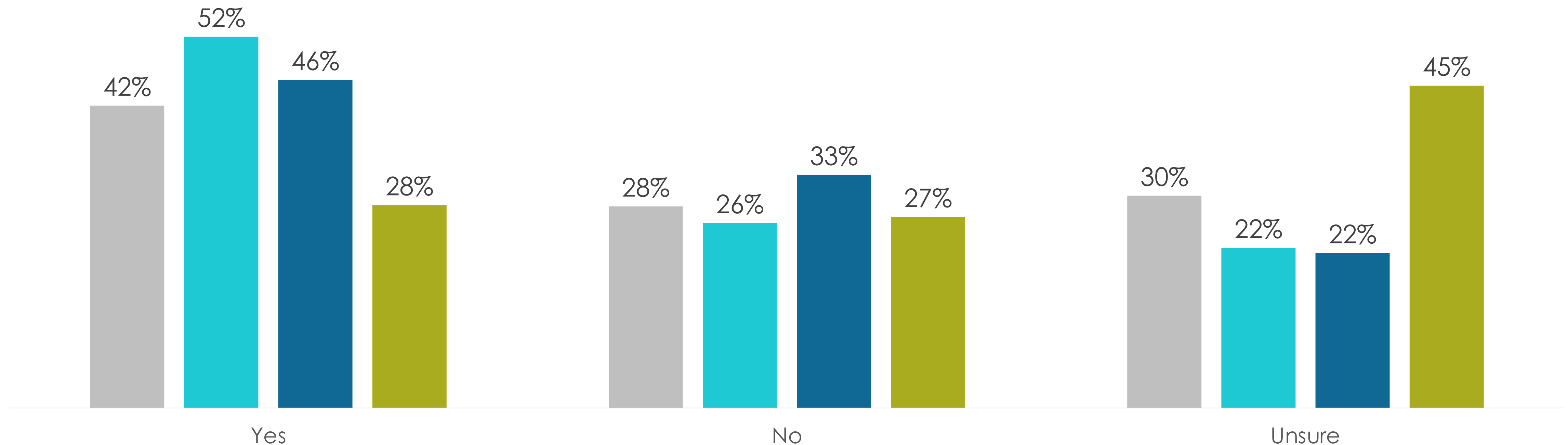


Legend: ■ All ■ Millennial ■ Gen X ■ Boomer

Recently, two of the Coronavirus vaccines under development in the U.S. have had their testing delayed because of abnormal reactions. Do you think this will delay how long it will take to get a vaccine to market?

Many people are hesitant to take a vaccine developed in the U.S. because they're concerned about the short development/testing cycle. As far as willingness to take a vaccine developed in Western Europe is concerned, only 42% of respondents would accept one.

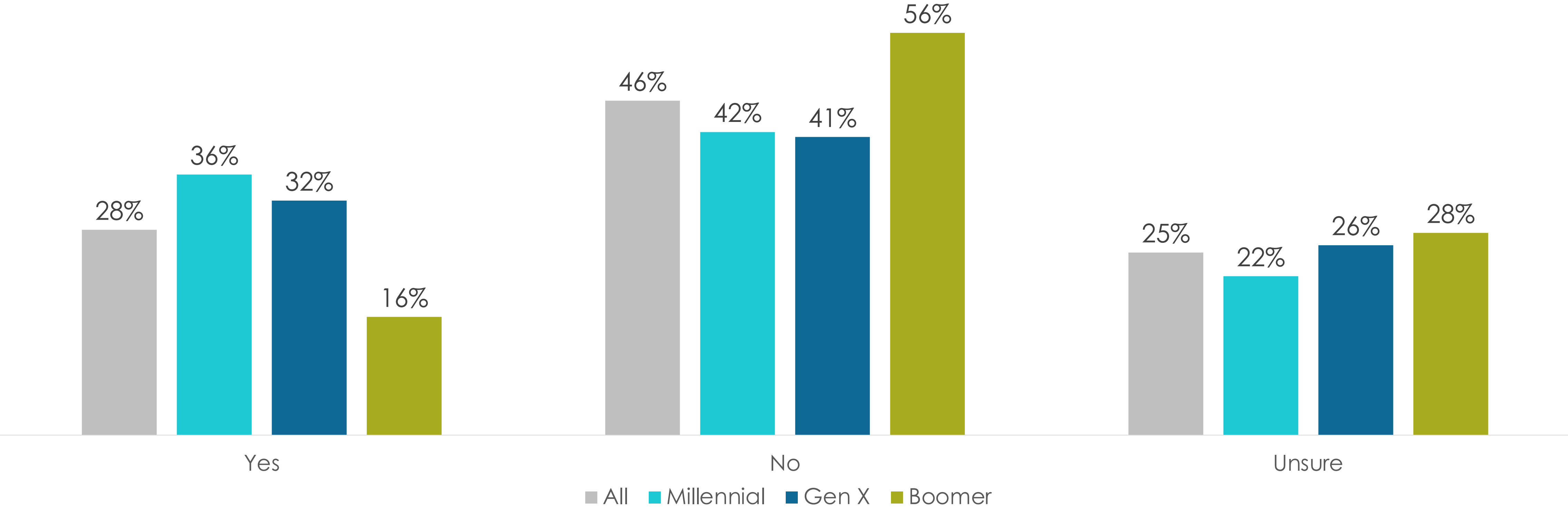
Willingness to take vaccine made in Europe



■ All ■ Millennial ■ Gen X ■ Boomer
Coronavirus vaccines are under development in countries around the world. Would you take a vaccine developed in **England or elsewhere in Europe** if it were approved for use in the U.S.?

The likelihood of respondents taking a vaccine developed in Russia drops to 28%, with an additional 25% unsure. Boomers (56%) are the most unwilling to accept a vaccine developed in Russia.

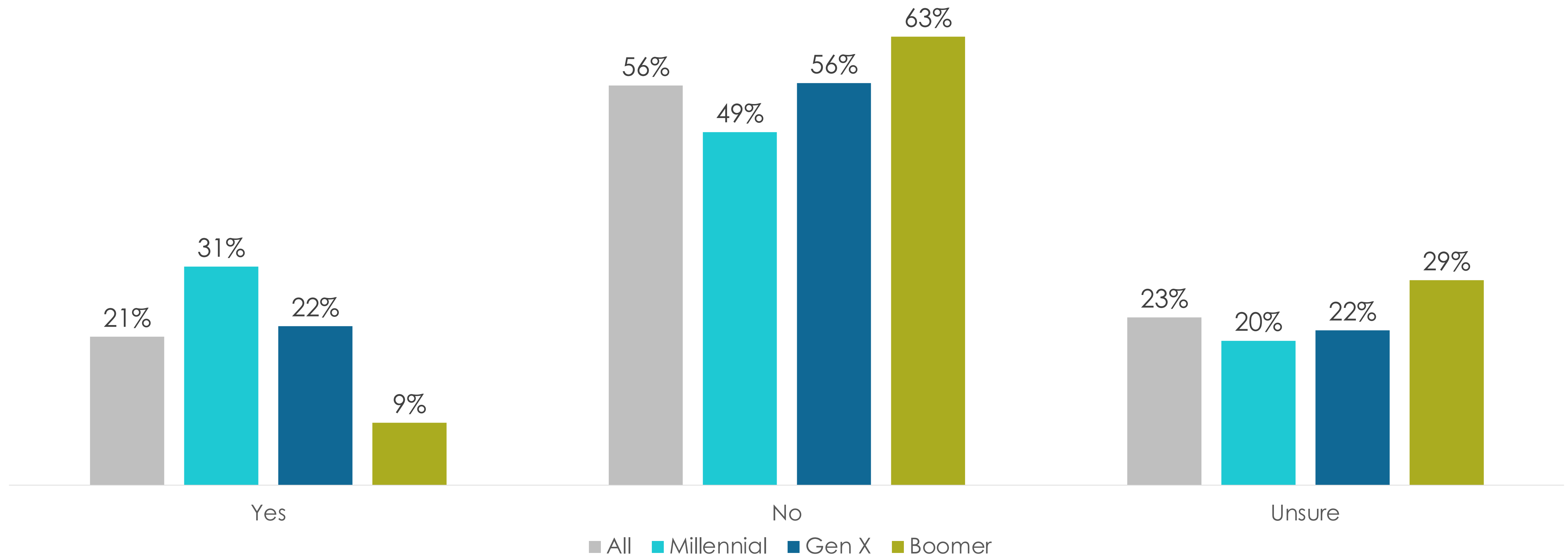
Willingness to take a vaccine made in Russia



Would you take a Coronavirus vaccine developed in **Russia** if it were approved for use in the U.S.?

A vaccine from China is even less acceptable. Only 21% of respondents would be willing to take a vaccine developed there and 56% have no interest at all.

Willingness to take a vaccine made in China



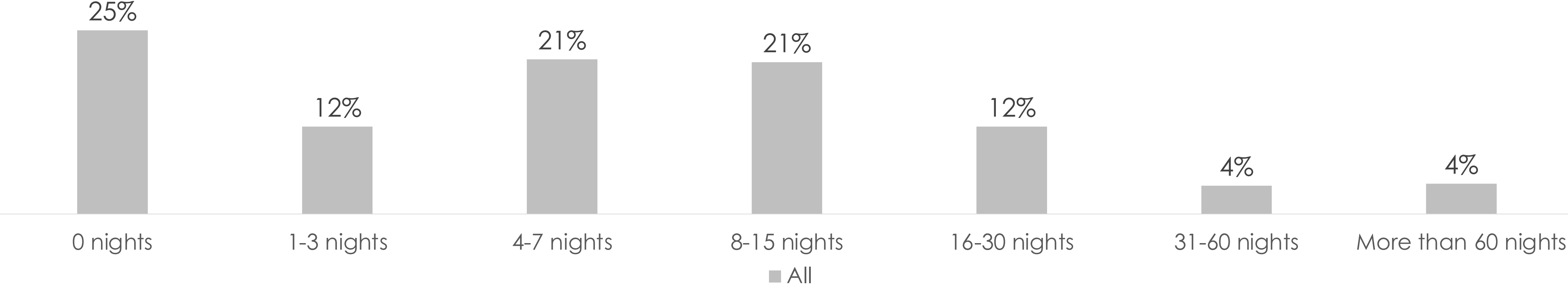
Would you take a Coronavirus vaccine developed in **China** if it were approved for use in the U.S.?

Travel Behaviors

A woman with long brown hair, wearing a light blue surgical face mask, a yellow puffer jacket, and a blue scarf, is sitting on a blue rolling suitcase in an airport terminal. She is looking off to the side. The background shows a blurred airport setting with other people and a counter.

The travel industry has been decimated by Coronavirus. Prior to the arrival of COVID-19, 75% of respondents engaged in some form of overnight travel in the course of a normal year.

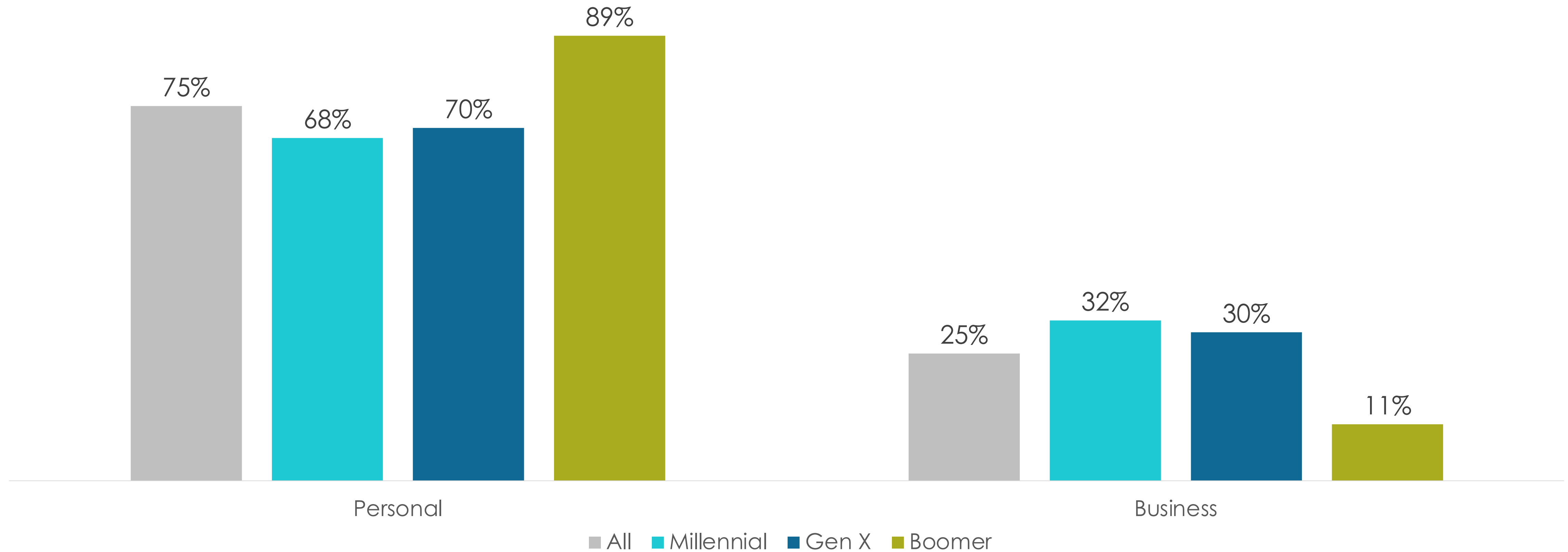
Number of nights traveled annually prior to COVID-19



Before COVID-19, approximately how many nights per year did you spend traveling?

For those that did travel, three-quarters was personal travel while 25% was for business.

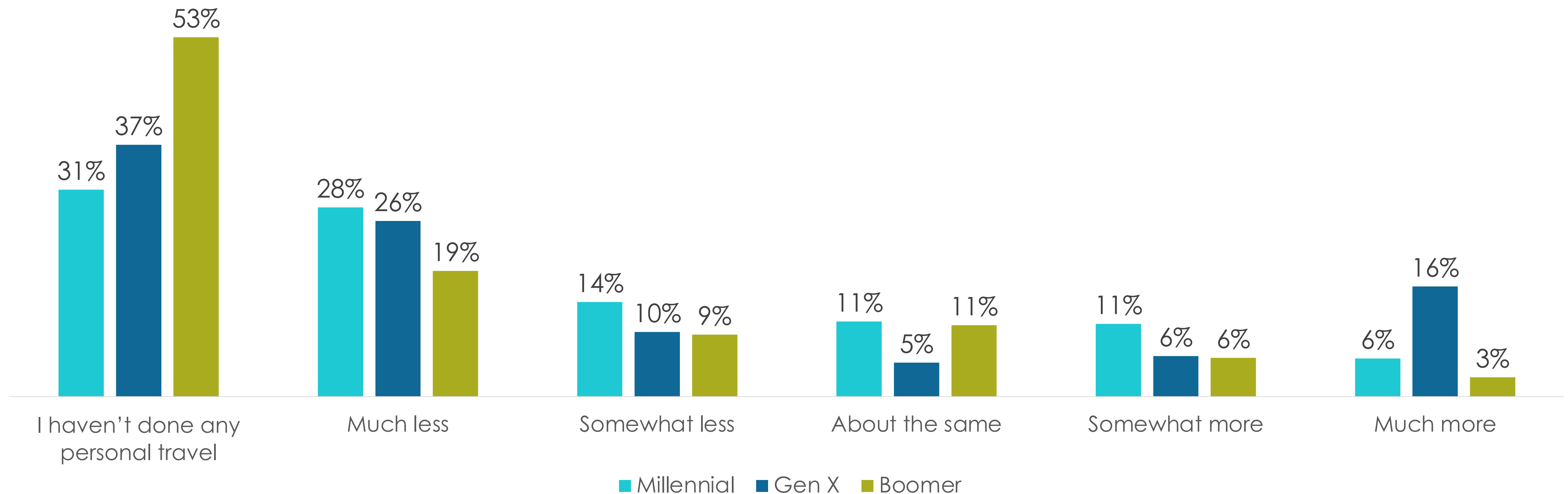
% of overnight travel before COVID-19



Before COVID-19, what % of your overnight travel was personal and how much was business travel? Total must equal 100%.

Among those who have typically traveled, a large portion has not done any personal travel at all since March, including more than half the Boomers (53%).

Change in personal travel since March



Since COVID-19 arrived in March, how has your overnight **personal** travel changed?

| Best | Cheapest | Fastest |
|---------------------------------|---------------------------------|---------------------------------|
| \$26 2h 42m (average) | \$26 2h 42m (average) | \$58 2h 32m (average) |

Greener choice This flight emits 13% less CO₂ than the average for your search

| | | | | |
|--------------------------|-----------------|--------------------|----------------|--------------------------------|
| FRONTIER AIRLINES | 10:36 AM MCO | 2h 43m Non-stop | 1:19 PM EWR | \$26 Select → |
| spirit | 7:00 AM EWR | 2h 41m Non-stop | 9:41 AM MCO | |

3/5 rating for COVID-19 safety measures

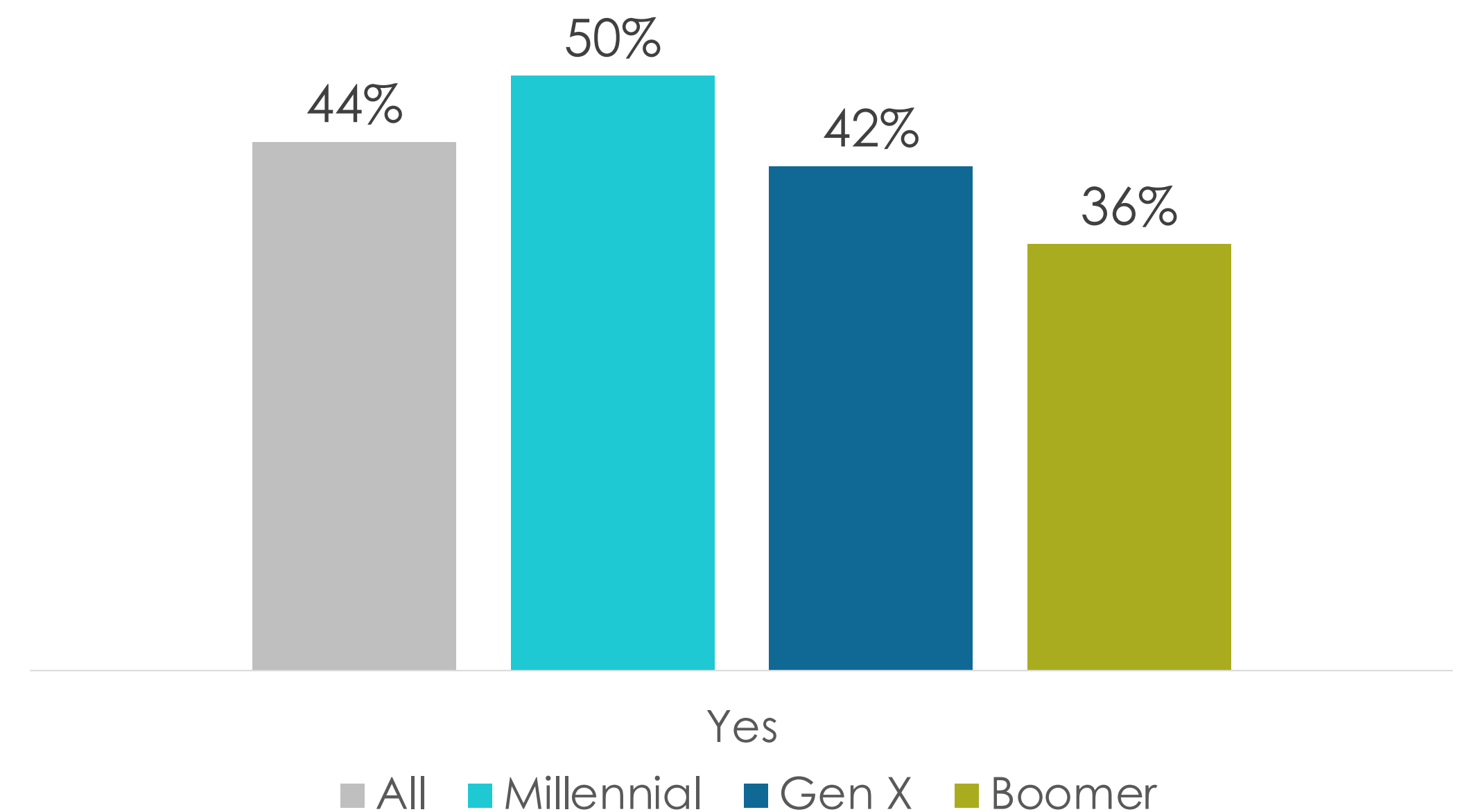
This flight emits 13% less CO₂

| | | | | |
|--------------------------|-----------------|--------------------|-----------------|--------------------------------|
| FRONTIER AIRLINES | 10:36 AM MCO | 2h 43m Non-stop | 1:19 PM EWR | \$26 Select → |
| spirit | 8:20 PM EWR | 2h 46m Non-stop | 11:06 PM MCO | |

3/5 rating for COVID-19 safety measures

Among those who have conducted personal travel, 44% have taken advantage of extraordinarily low airfares and hotel rates. Boomers (36%) are the least likely to have done so.

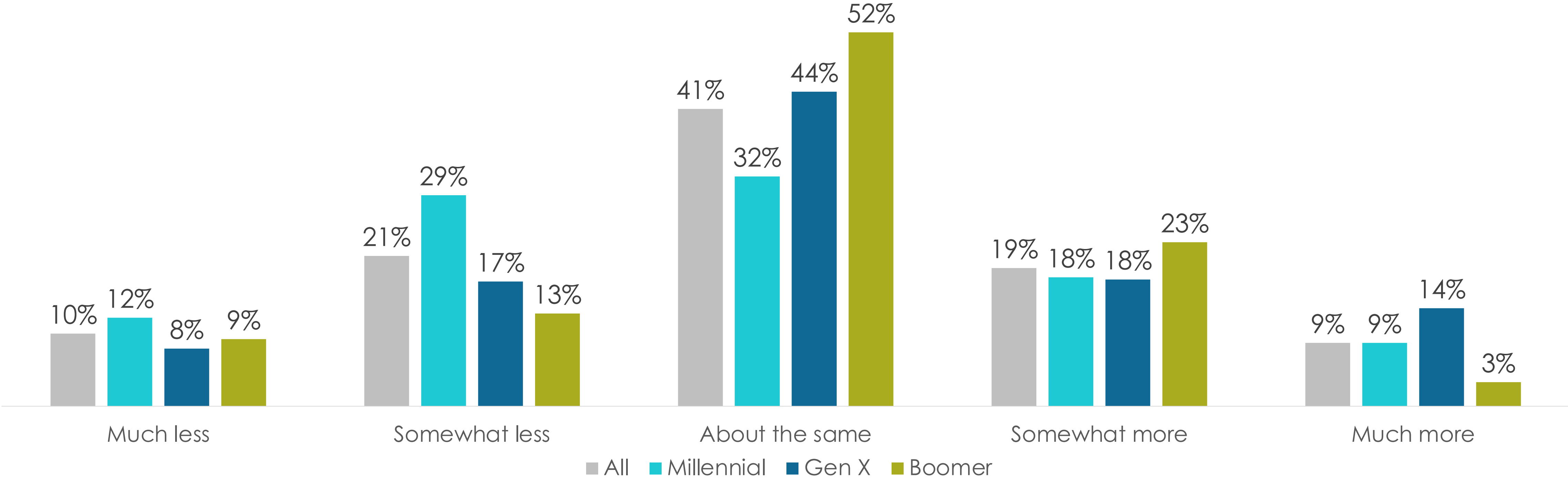
Taken advantage of air travel and hotel discounts since outbreak of COVID-19



Have you taken advantage of any of the special discounts on hotels or air travel that have been available because of the Coronavirus?

Personal travel in the post-COVID world should look much like it did previously. 31% of respondents expect to do less traveling than their historic norm while 28% expect to do more.

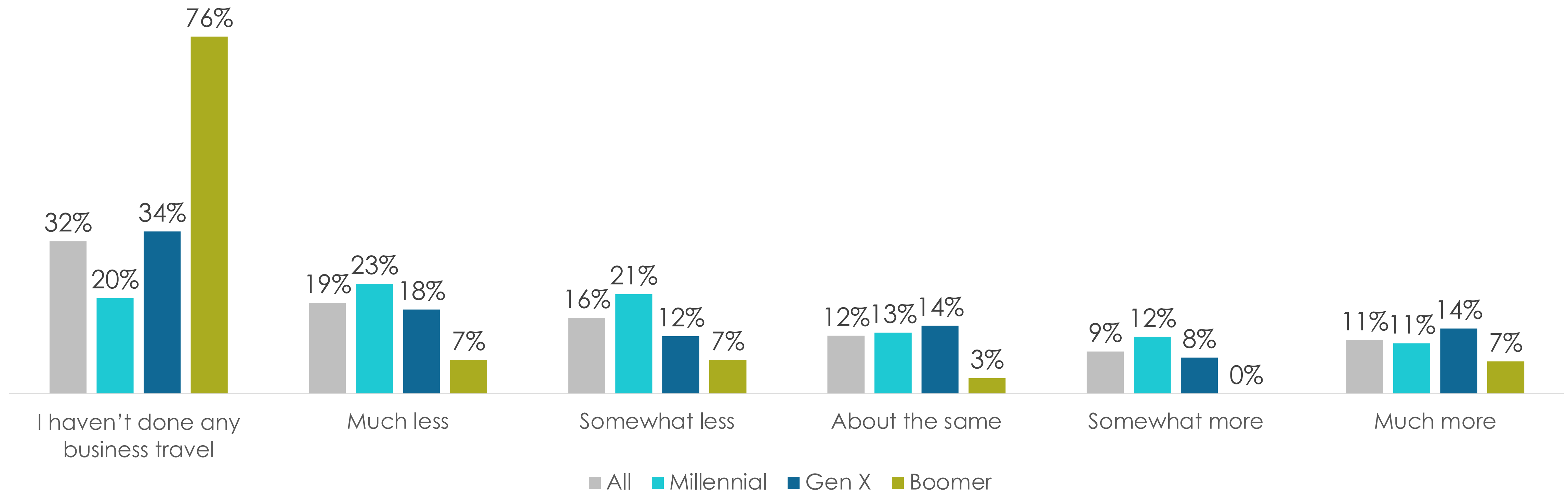
More/less personal travel once COVID-19 is brought under control



After COVID-19 is brought under control, how much more or less **personal** travel do you think you'll do compared to what you normally did before COVID?

32% of business travelers have eliminated all overnight travel since the onset of COVID-19. Only 20% are doing more business travel than they've done historically.

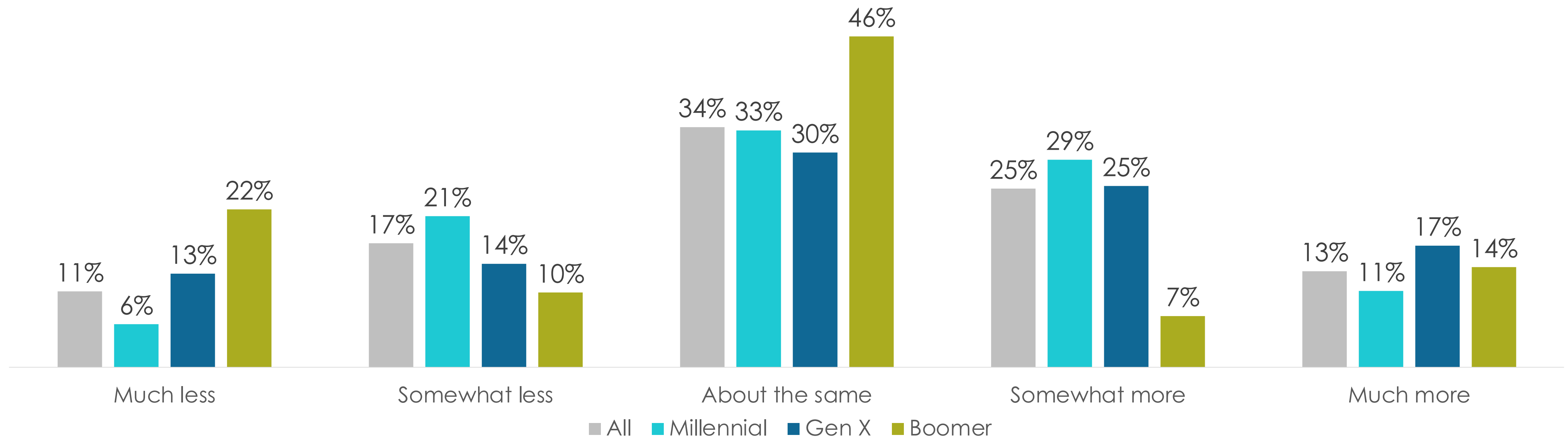
Change in business travel since March



Since COVID-19 arrived in March, how has your overnight **business** travel changed?

Business travel should rebound even more successfully than personal travel. 38% of business travelers expect more travel in the post-COVID world while only 28% anticipate traveling less.

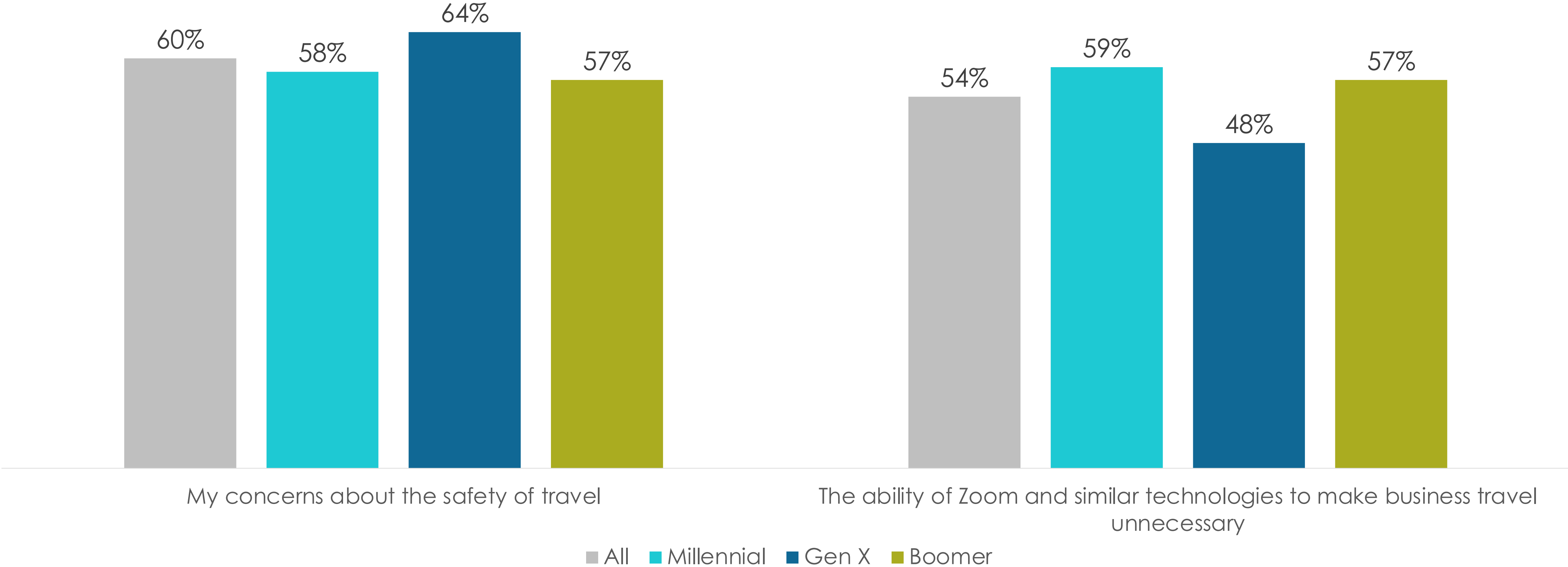
More/less business travel once COVID-19 is brought under control



After COVID-19 is brought under control, how much more or less **business** travel do you think you'll do compared to what you normally did before COVID?

Among the 28% of respondents who anticipate less business travel than in the past, 60% cite health concerns and 54% identified the availability of Zoom and other platforms to maintain their connectivity as the primary reasons.

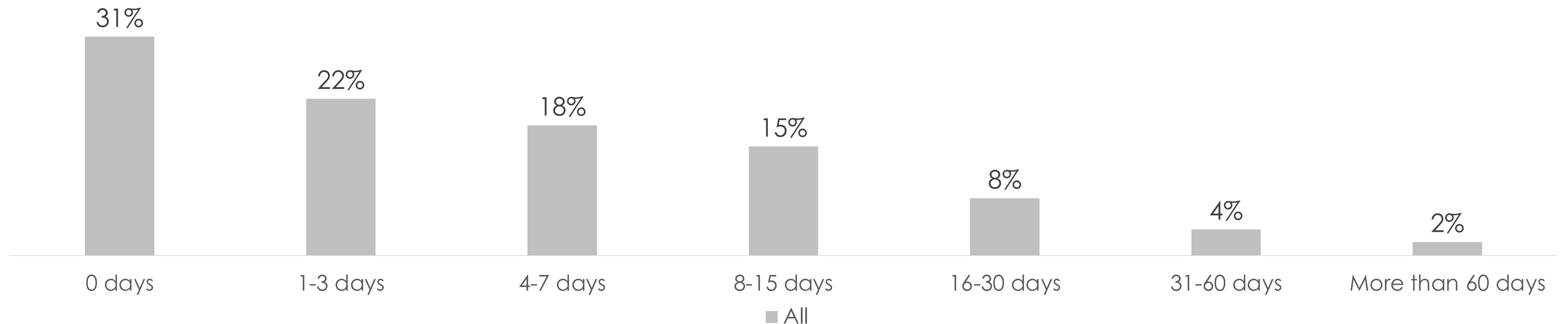
Influence on doing less business travel after COVID-19 is brought under control



How influential are the following on the likelihood that you'll do less business travel after COVID is brought under control?

69% of those who traveled prior to COVID-19 for personal or business reasons did at least some air travel.

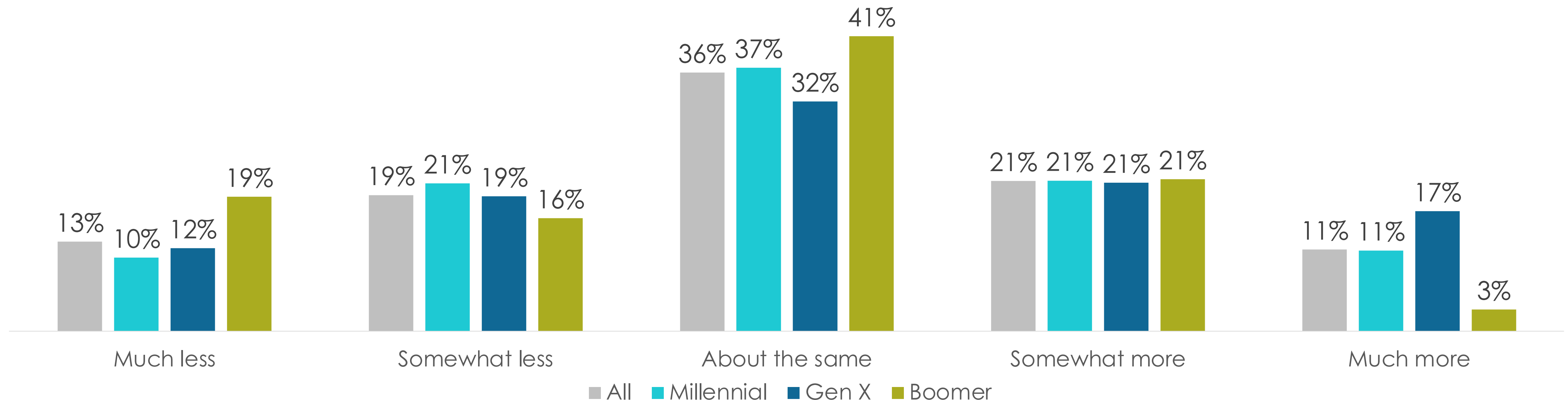
Days spent flying prior to COVID-19



Prior to COVID-19, how many days a year did you spending **flying** for personal or business travel?

Based on respondent feedback, it appears the airline industry can expect similar traffic in the future to what they experienced in the pre-COVID days. 32% expect less air travel and 32% expect more.

Air travel once COVID-19 is under control vs. Before COVID-19

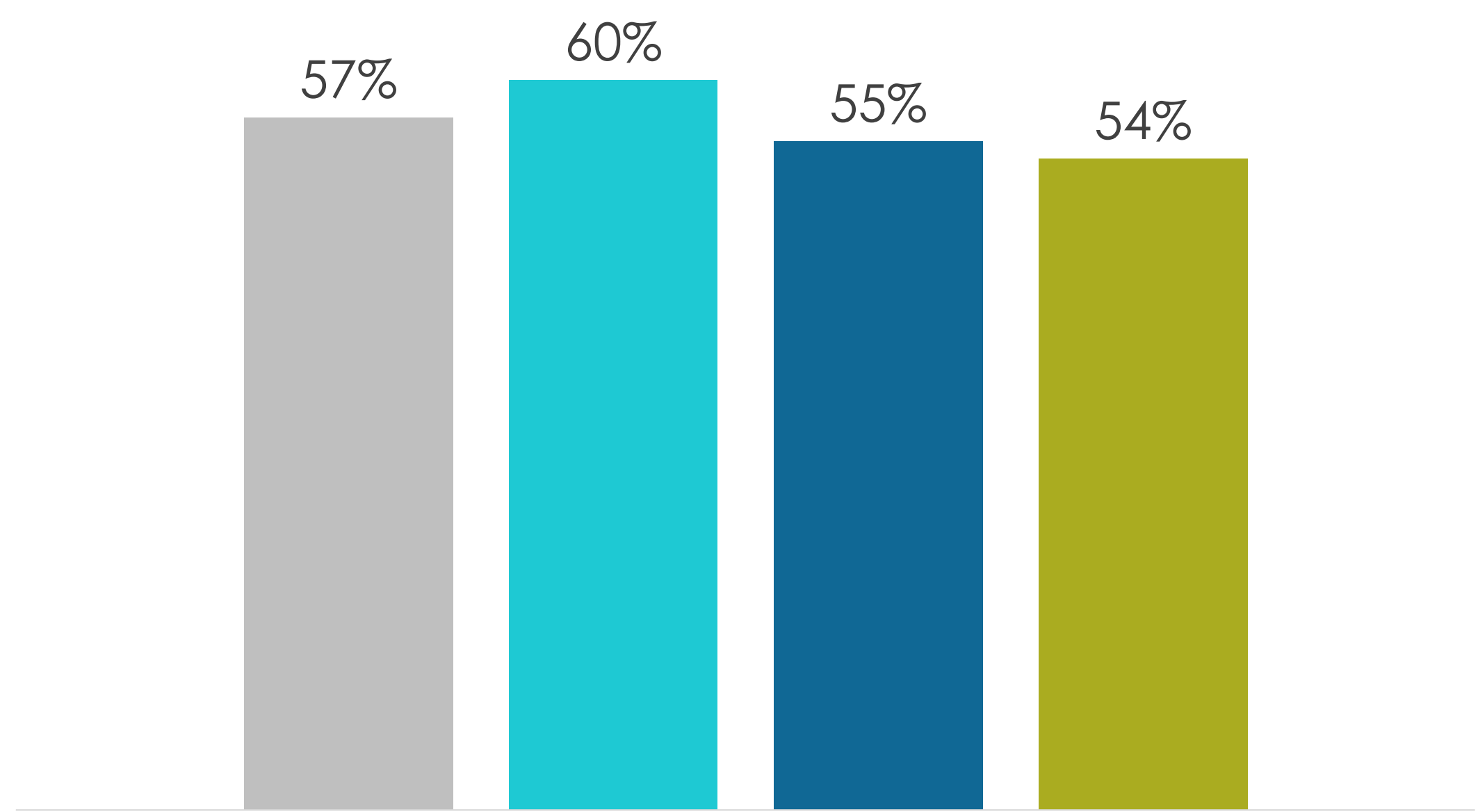


Once COVID-19 is brought under control, how do you think your air travel will compare to the air travel you did before COVID?



Among those reducing their air travel, 57% will be replacing at least a portion of it with car travel.

% who will substitute travel by car for trips would have flown prior to COVID-19



■ All ■ Millennial ■ Gen X ■ Boomer

Will you substitute travel by car for trips for which you would have flown before COVID?

Summary

COVID Hot Topics

- Despite the large shift in the news cycle from COVID-19 to the election, more people (37%) feel better informed about COVID now than they did 2 months ago than those who feel less informed (22%).
- The change in information level has contributed to a greater concern about the virus.
 - 34% of respondents are more worried today than two months ago, while only 25% are less concerned.
 - More Boomers (64%) expect an increase in COVID cases over the next few months than do the other generations (Millennials 45%; GenXers 48%).
- The recent news about delays in vaccine trials because of potential adverse reactions have 88% of respondents thinking vaccine availability will be delayed. More than half (51%) feel the delay will be extensive.
- Many people are hesitant to take a vaccine developed in the U.S. because they're concerned about the short development/testing cycle.
 - As far as willingness to take a vaccine developed in Western Europe is concerned, only 42% of respondents would accept one.

Summary - Continued

- The likelihood of respondents taking a vaccine developed in Russia drops to 28%, with an additional 25% unsure.
 - Boomers (56%) are the most adamant about not taking a vaccine developed in Russia.
- A vaccine from China is even less acceptable. Only 21% of respondents would be willing to take a vaccine developed there, and 56% have no interest at all.

Travel Behaviors

- The travel industry has been decimated by Coronavirus. Prior to the arrival of COVID-19, 75% of respondents engaged in some form of overnight travel in the course of a normal year.
- For those that did travel, 75% was personal travel while 25% was for business.
- Among those who have typically traveled, a large portion has done any personal travel at all since March, including more than half the Boomers (53%).
- Among those who have conducted personal travel during COVID, 44% have taken advantage of extraordinarily low airfares and hotel rates. Boomers (36%) are the least likely to have done so.
- Personal travel in the post-COVID world should look much like it did previously. 31% of respondents expect to do less traveling than their historical norm, while 28% expect to do more.

Summary - Continued

- 32% of business travelers have eliminated all overnight travel since the onset of COVID-19.
 - Only 20% are doing more business travel than they've done historically.
- Business travel should rebound even more successfully than personal travel. 38% of business travelers expect more travel in the post-COVID world, while only 28% anticipate traveling less.
 - Among the 28% of respondents who anticipate less business travel than in the past, 60% cite health concerns and 54% identified the availability of Zoom and other platforms to maintain their connectivity as the primary reasons.
- 69% of those who traveled prior to COVID-19 did at least some air travel.
- Based on respondent feedback, it appears the airline industry can expect similar traffic in the future to what they experienced in the pre-COVID days. 32% expect less air travel and 32% expect more.
 - Among those reducing their air travel, 57% will be replacing at least a portion of it with car travel.