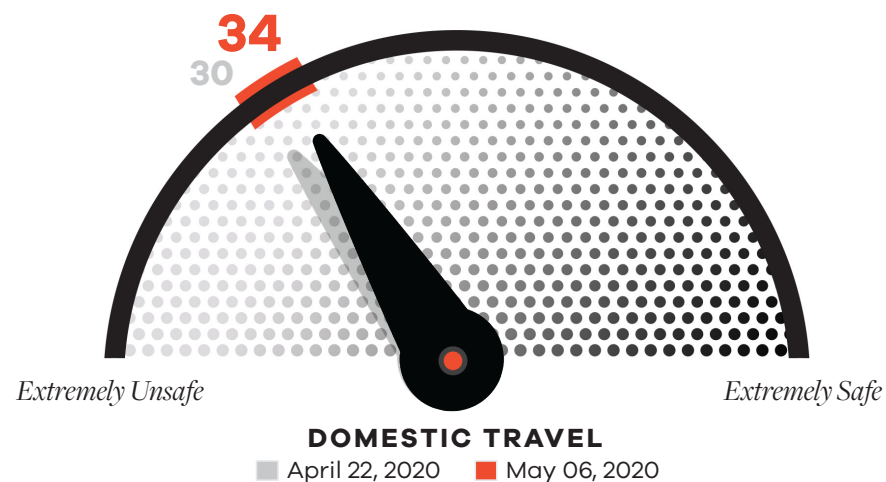


MAY 20, 2020

TRAVEL SAFETY Barometer

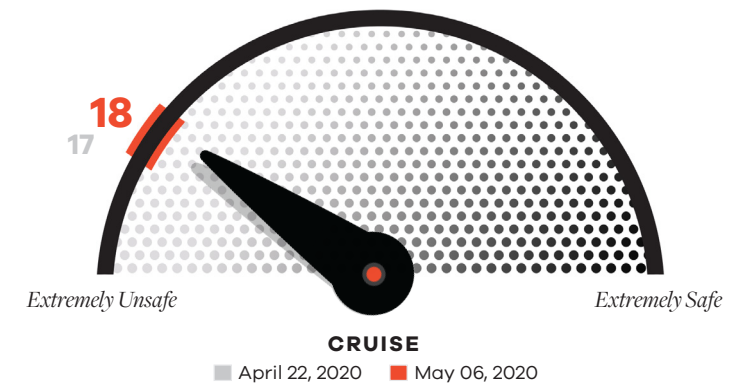
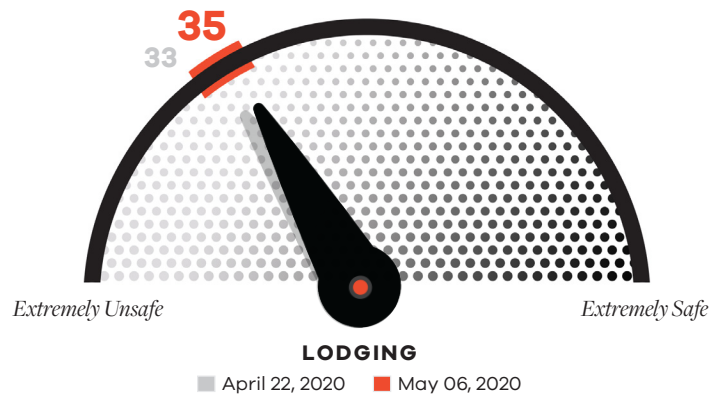
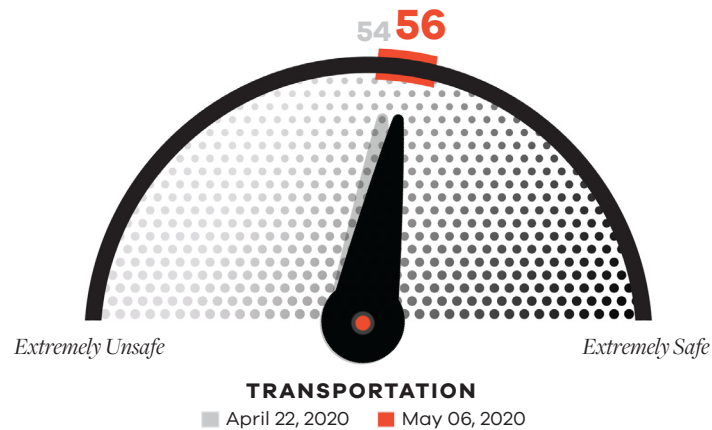
Travel Safety Measure Ticks Upward as Travel Industry Starts Recovery.

The MMGY Global Travel Safety Barometer is a sentiment tracking tool that measures Americans' perceptions of the safety of engaging in specific travel behaviors on a scale from 0 (Extremely Unsafe) to 100 (Extremely Safe). It is based on a nationally representative survey of all active travelers in the country that is conducted monthly using MMGY Global's proprietary Travel Intentions Pulse database. Barometer metrics are published for both domestic and international travel, as well as category-specific metrics for transportation, lodging, cruising, dining and entertainment.



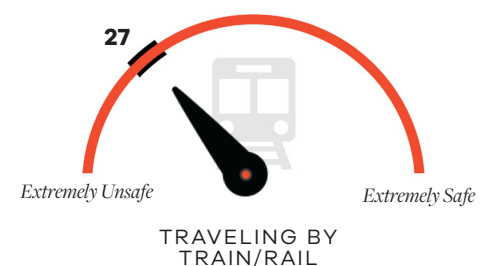
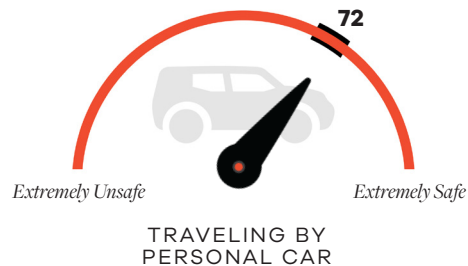
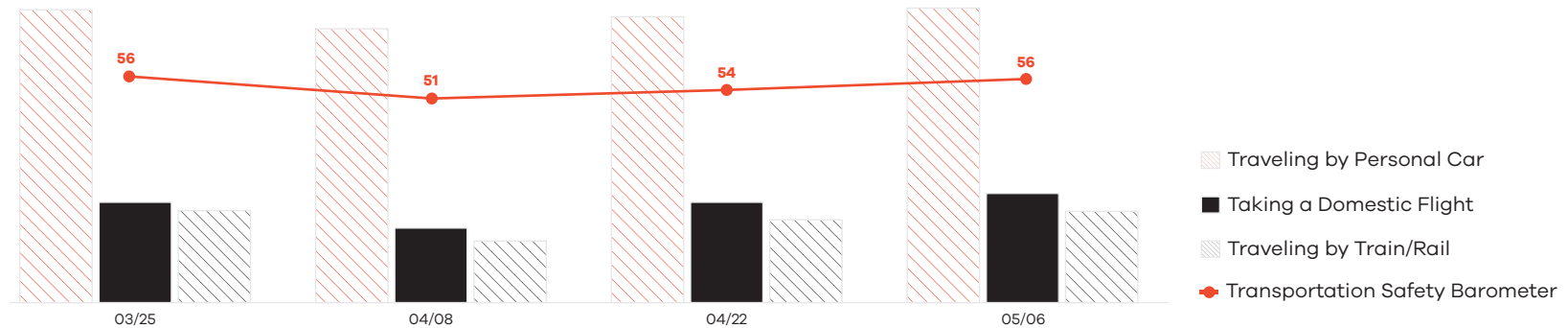
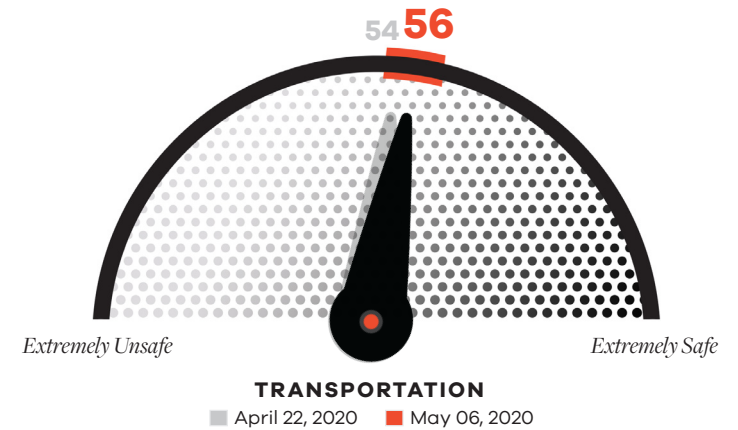
Business Travel and the Cruise Industry Battle Safety Concerns.

While the relative safety of driving in a personal vehicle propels the MMGY Global Transportation Barometer higher, both the Business Travel Safety and Cruise Safety Barometers signal a more challenging recovery for these industry segments.



Travelers Continue to Feel Safest In Their Own Cars.

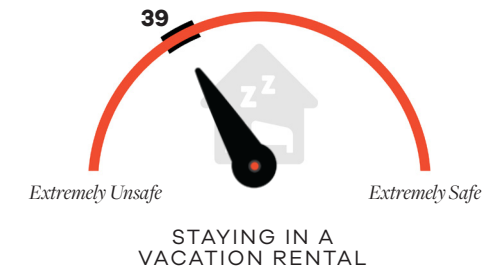
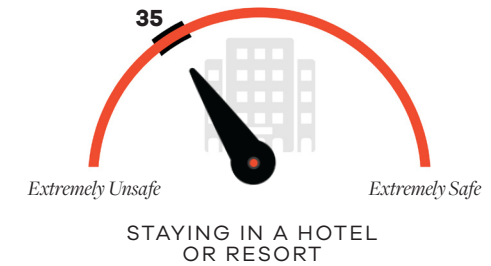
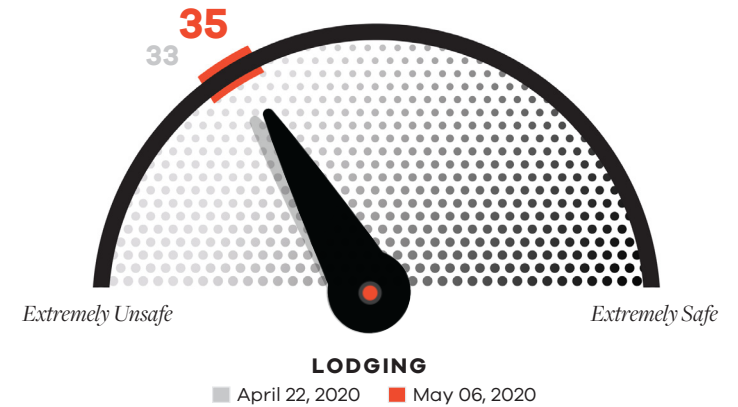
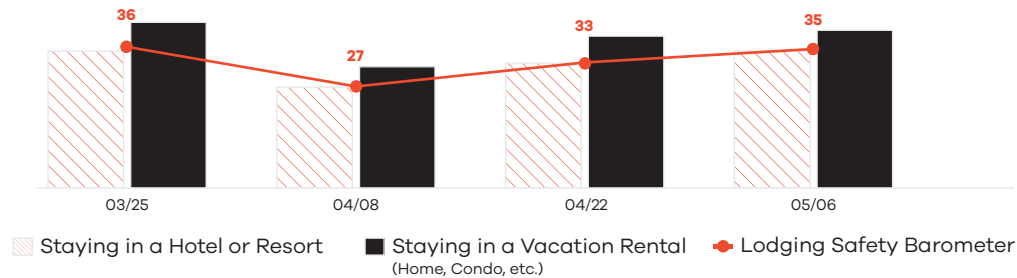
Survey data continues to support the notion that travelers are most likely to travel by car as the pandemic subsides. In addition, travelers say they are more likely to choose destinations that are closer to home, and are most likely to visit friends and family as the primary motivation for their first post-pandemic leisure trip.



LODGING

Safety Perception of Short-Term Rentals Exceeds Hotels and Resorts.

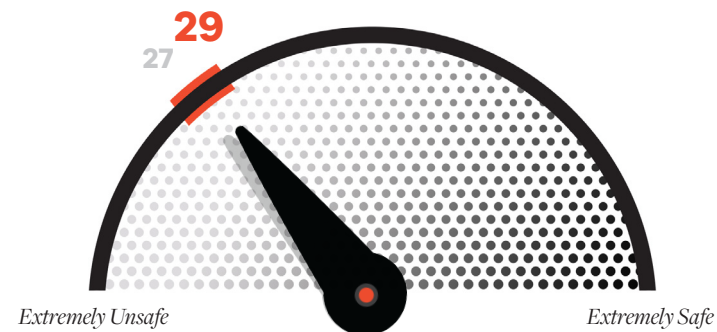
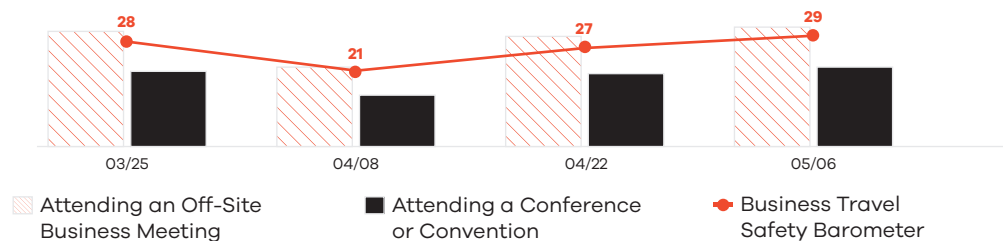
For the fourth straight survey wave, consumers rated the perceived safety at short-term rental properties to be slightly higher than traditional hotels and resorts. This may be related to a greater sense of control travelers have in a rental unit, which often includes more space and longer length of stay.



BUSINESS TRAVEL

Business Travel Recovery Is Likely to Take Longer Than Leisure.

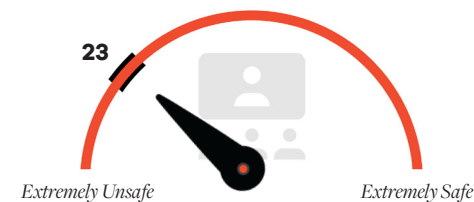
As evidenced by previous travel industry downturns, including after 9/11 and the Great Recession, business travel will likely take longer to recover than leisure travel. Corporate meetings travel will have to overcome increased comfort with the use of video conferencing, and conferences and conventions will face the challenge of large gatherings as concerns about the pandemic linger.



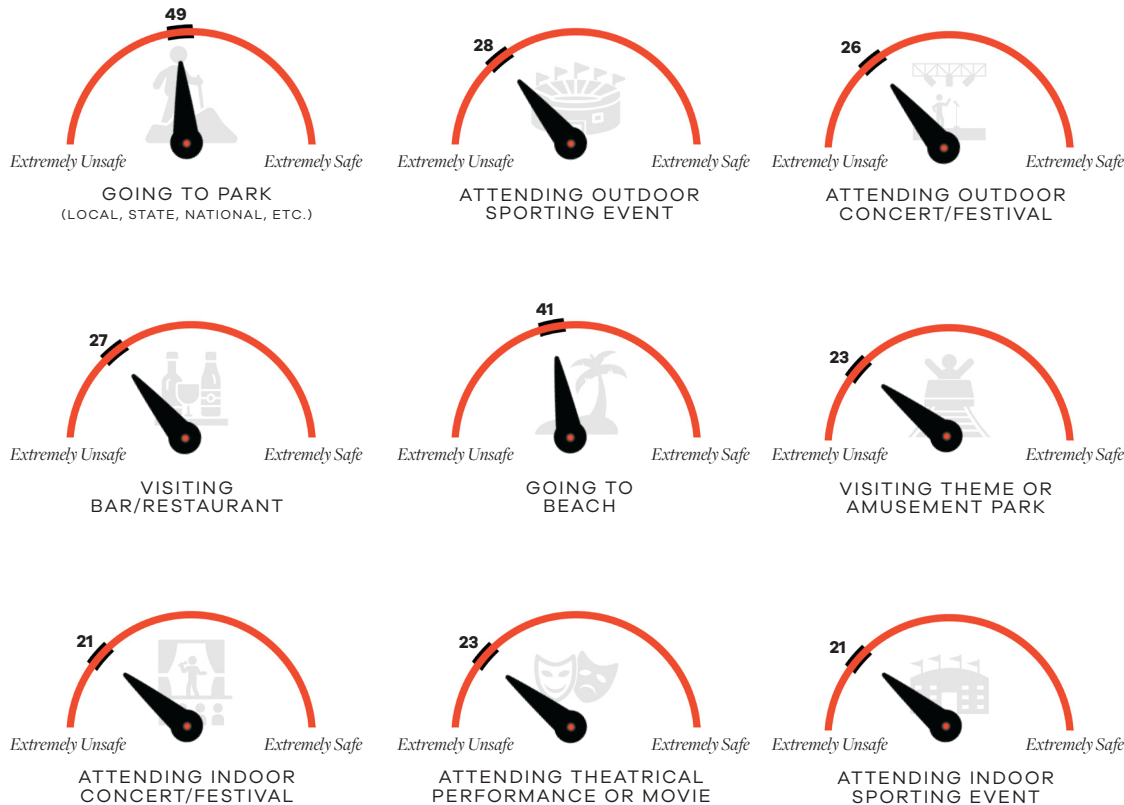
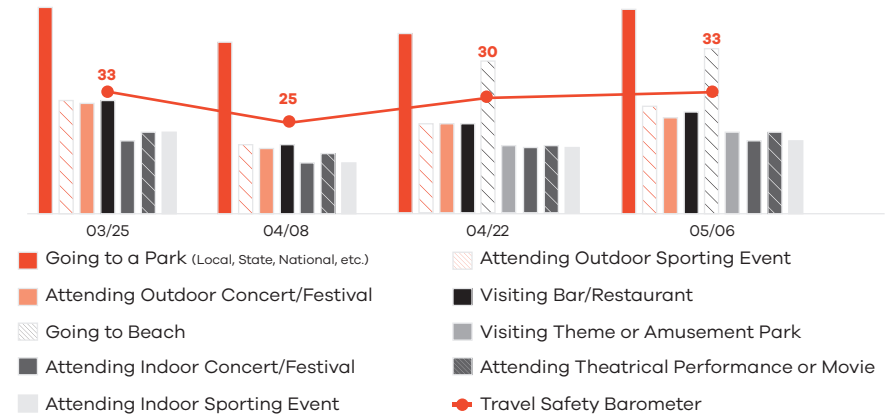
BUSINESS TRAVEL
 April 22, 2020 May 06, 2020



ATTENDING AN OFF-SITE BUSINESS MEETING



ATTENDING A CONFERENCE OR CONVENTION

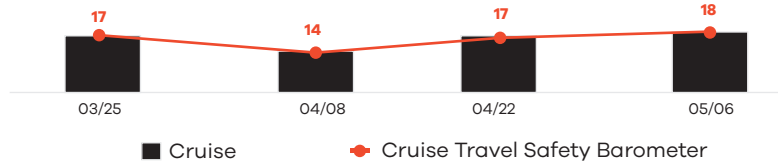
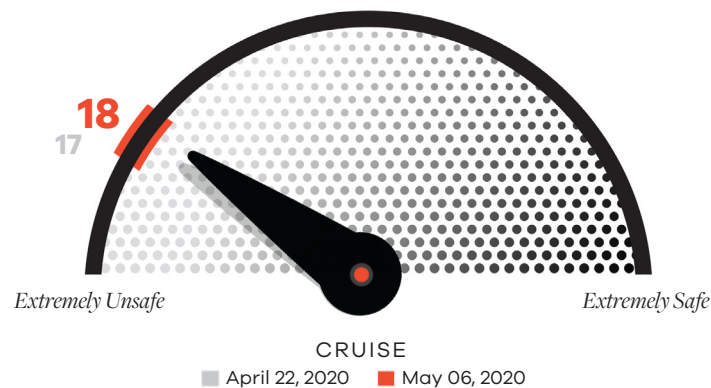


Outdoor Experiences Are Considered Much Safer Than Indoor Entertainment.

As long as the fear of COVID-19 infection remains, activities that typically take place indoors and with larger crowds in contained spaces will continue to struggle to attract visitors. Destinations that offer outdoor activities and natural experiences, such as state and national parks and beaches, are perceived to be much safer and will likely recover more readily from the pandemic.

Reassuring Passengers Will Be Key to Cruise Industry Recovery.

With a Barometer score of just 18 on a scale from 1–100, the cruise industry will have to work hard to convince potential travelers that it's once again safe to board their ships. However, with a built-in sales network of travel agents across the globe, the industry should be well-positioned to recover as the perception of traveler safety improves.



METHODOLOGY

All barometric values are based on response data from the MMGY Travel Intelligence TIPS tracking survey monitoring consumer sentiment around travel following COVID-19. This nationally representative study surveys 600 leisure travelers and 600 business travelers biweekly between late March and mid-May 2020 and monthly beginning in June 2020. Final values to date were calculated by weighting all variables based on the latest travel performance data from the company's proprietary DK Shiftlet performance data.

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Source: MMGY Global Travel Safety Barometer; May 20, 2020

MMGY Travel Intelligence

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