TRAVEL

Is it time to pack our bags and go again?
PAGE 02

With travel up in the air, how experts see potential futures.
PAGE 07

Will our world become smaller?
PAGE 10
Among the industries impacted by COVID-19, travel and hospitality have been hit especially hard. The rebound is also among the hardest to forecast. Will conventions and other business travel recover quickly or be forever changed? Will tourists take to the open roads more than the skies? Will vacation rentals grow in popularity or be bogged down in restrictions?

We created a set of master vignettes: one hopeful, one woeful and one somewhere in between. They’re not formal forecasts, but serve as a narrative starting point for a discussion about the near-term future. Our in-house futurists have deemed them “scary but plausible.” Since they were written, we can already see parts of each of them playing out. We shared them with experts in travel, hospitality, tourism, and the convention business. Without leaving home (for now) we’ve asked these experts to send us some “postcards from the future.” They gave us their thoughts on how the future might unfold under each of those situations. The first postcard comes to us from a future we might try to aim for, with smart investments and bold moves, to get the economy back on track. The second represents a future where missteps were made along the way and those play out with drawn-out consequences. The final presents us with a path which is both avoidable and dire.

Of course, the answer to what the future holds is likely a combination of all of these factors with many not even covered. The hope is that by thinking through as many potential futures available, we can all be prepared for each outcome. What do you think? Are you ready to hit the road again?

**Matt Carmichael** is the editor of What the Future and VP, Editorial Strategy for Ipsos in North America
We created three vignettes of potential futures for our experts to react to through a travel lens.

This is our most hopeful vignette: America comes together, makes the best decisions and makes a conscious effort to invest in our future in a meaningful way — while working to keep our people and our economy alive and well.

The recovery isn’t quick — but it’s quicker. All things considered, things might just turn out OK in this timeline and maybe we even emerge a stronger, safer, healthier nation on the other side. As you plan, this is the option to aim for. But it’s going to take some coordinated work to get us there.

**TESTING:** Testing for COVID-19 and for antibodies turns a corner and gains speed, leading to widespread testing available for anyone who wants it and many who are ordered to get tested before they are allowed to return to work. But by fall, a vaccine has been discovered and a massive national effort gets underway to produce enough to meet demand. People begin to feel comfortable venturing out in at least small groups.

**REGIONALISM:** Fueled by conservative money from familiar sources, protesters in some states, the federal government and some Republican governors, anxious to get the economy opened, begin slowly removing restrictions. This is exacerbated by the media, which presents this as a partisan conflict with winners and losers, all with predictable results. Hot spots initially flare up in areas where beaches, religious services, schools and sporting events are allowed to resume. But as the testing gathers steam, people know to self-quarantine and follow distancing norms, if they have been exposed. And as the virus ebbs over the summer, people can return to some sense of restricted normal and the virus doesn’t hit as hard in fall because known carriers are identified, and the spread is vastly slowed.

**EMPLOYMENT:** As the economy starts to open, doctors, health care workers, gig economy and many bar and restaurant workers, who were laid off to both reduce costs as well as allow them to file for unemployment benefits, are rehired as quickly as they can be and the unemployment rate starts dropping. It’s a long road but it’s helped by a bipartisan “new deal” focused on infrastructure (both physical and technology) and an acceleration of a trend toward reshoring of manufacturing with an eye toward national security preparedness initiatives, making sure that key equipment, supplies and technology components can and will be built in America.

**STIMULUS:** This “new deal” of sorts pays off both in the short term by helping businesses get back on their feet and in the long term by preparing the U.S. and retooling to a degree for the future of 5G, autonomous travel and more. Investing more broadly than a pure physical infrastructure investment creates good jobs for a wider range of skilled workers. Restrictions put in place by Congress on the bail-out funds ensure that money is invested in keeping the workforce employed and businesses open, rather than stock buybacks and executive bonuses. Confidence returns and people are buoyed by a sense of resilience unseen since the post-war period.

**ELECTIONS:** State and local governments work together with the FEC to ensure a safe election with a heavy focus on absentee balloting and voting by mail. It’s contentious. It’s close. The nation is frustrated because it takes time for the mail-in ballots to be counted and the results are not immediate. But in the end, the elections happen on schedule and the results are accepted by both sides.
Vignette one drives our most hopeful future. Experts from various sectors of the travel industry responded with their visions for a best-case recovery.

The rapid rebound of the economy and from the virus has the entire population quickly returning to their lives — and in a hurry to resume their pastimes and hobbies (and just get out of the house!). The affluent, who have been dealing with pent-up demand to return to their wanderlust for months, are the first to commence travel planning and reschedule their cancelled trips.

Many start traveling almost immediately, both for business and personally, and at the levels they were before the virus (as they’ve been telling us they planned to in recent studies). While hotels and rentals have established cleanliness and safety standards, the wide availability of testing and the promise of a vaccine gives all consumers greater confidence to resume their normal ways. Affluent consumers take this as a cue to take not just domestic trips but to consider international ones, as well — although initially to developed regions with strong infrastructure and healthcare.

While most consumers (affluent and non-affluent) choose first to visit friends and family they’ve missed during the lockdown, the ultra-affluent are also interested in visiting special locations they’ve been researching and thinking about for awhile. And while trips to far-flung or off-the-grid global locations aren’t on the agenda at first, affluent consumers feel safe enough to resume their focus on travel being an experience — and after a short while begin again to choose destinations, activities and resorts that fulfill their desires to learn, experience and transform.

Michael Baer
Senior vice president, team lead, Ipsos Affluent Intelligence

Re-imagined travel and hospitality experiences will include new brand standards along the customer’s journey, making it safer for everyone. Brands will institute and communicate clear, credible, complete and consistent brand standards relating to measures they are taking to keep passengers and crew safe. Inventory allocation systems (seats, rooms, cabins, restaurant seats) will be adjusted to “sell” only every other unit, and occupancy will be spaced with gaps in between. Reservation requests will include screening questions about recent travel and compromised health conditions. Guests will be required to arrive earlier than check-in time to repeat screening questions. Guests that test positive will be quarantined.

“Business travelers will lead the way and drive the new hotel and airline safety policies.”
- Mike Bellmont

Gloves and masks will be handed out on arrival and we will be required to use them. Check-in and check-out will be distanced, masked, and low contact. All tickets, room keys and documentation will be digital. Every hotel room and airline seat will be stocked with hand sanitizers, masks and gloves. Low-touch spaces will be accessed via motion-activated doors, and voice-activated elevator call buttons, overhead bins, floor selections, and room doors. A biodegradable “sanitized for your protection” note will be affixed to every airline seat and hotel room after an “operating room” cleaning protocol is performed before it can be reused. Social distancing protocols for guests will be required with masks on in all public areas, 6 feet/2 meters apart, one guest per elevator ride. Restaurant tables will be at least 6 feet apart and dining hours will be lengthened to de-density dining rooms. Strict limits on occupancy and spacing will be placed on guests in spas and fitness centers. All food delivery will be no-contact, using all single-use, biodegradable equipment. Cleaning services will only be available on demand, with all employees mandated to use masks and gloves. Guests will be continuously informed about local safety ordinances at every destination that inhibit or enable a visit.

Chekitan Dev
Professor, School of Hotel Administration, Cornell SC Johnson College of Business

For many Americans, the need to travel for emotional and physical wellbeing has never been more essential. As travelers decide on their summer plans, many will be hesitant to return to large-scale operations like hotels and resorts and will instead turn their eyes on smaller, individual experiences: Short-term vacation rentals, although not destinations, will be in similar demand. Those short-term vacation rentals that offer rural recreation and safe seclusion — all within driving distance from metro areas — will boom, creating new travel trends likely to last for years to come.

Lauren Hudson
Vice president, team lead, Ipsos design studio; and co-founder, chief brand architect of the Wildwood Collective short-term rental company

The COVID-19 crisis showed how critical the hospitality industry is to the world’s economy and how fragile the industry can be when stressed with external forces. It’s the canary in the coal mine to measure larger socioeconomic well-being. In this hopeful future, we see local and national leaders acknowledge the vital role hospitality plays in the economy. They extend and increase funding to help thousands of hospitality-related businesses — restaurants, retail, cultural attractions, destination marketing organizations, hotels — come back to full health. Communities on the verge of decline find themselves rising as the thousands of people who are the backbone of local hospitality return to
the workforce. Small businesses that define a community’s vibe and culture are rescued and renewed. This focus on hospitality draws particular attention to businesses owned by people of color and immigrants, boosting them to new levels of market share and stability. Destinations will commit to safety standards that make residents feel confident in receiving outsiders and make visitors feel secure in their decision to experience a community.

Destinations can still thrive in this new travel reality by adjusting their strengths to meet visitor expectations of safety and social distancing. In Madison, we flipped our destination conversation from being an urban hub with excellent outdoor access, to be an outdoor mecca of bike trails, lakes and parks with easy access to urban amenities. Mid-size and small communities reach new economic heights following the resurrection of travel.

Rob Gard
Director, PR & Communications, Destination Madison

As the fear of the virus dissipates and the country returns to work, business travelers will lead the way and drive the new hotel and airline safety policies. However, even under the most optimistic circumstances, over half of frequent business travelers expect to travel less than previous levels. This is driven by safety concerns, budget cuts and clients/customers not accepting in-person meetings. Despite these barriers, air carriers and hotel companies will need to find new ways to incent business travelers to get back on airplanes and in hotels. Prior to COVID-19, incentives such as upgrades and bonus points were of high priority, but these take a back seat to safety and health concerns. For a return to airline travel, frequent business travelers will demand/expect the blocking or removal of middle seats, and face masks for crew and passengers. As long as airlines fail to make these and other accommodations now, fears and concerns will remain, even under the most positive situations.

Mike Bellmont
Senior vice president, U.S. Senior Client Officer, Ipsos

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**People are losing confidence in the safety of air travel**

Are you more or less comfortable with the idea of flying now than you were a month ago? (Percent total)

<table>
<thead>
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<th>Much more comfortable</th>
<th>Slightly more comfortable</th>
<th>Not more or less comfortable</th>
<th>Slightly less comfortable</th>
<th>Much less comfortable</th>
<th>Don’t know</th>
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<td>11</td>
<td>32</td>
<td>18</td>
<td>31</td>
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</tr>
</tbody>
</table>

(Source: Ipsos Coronavirus Consumer Tracker conducted between June 8 and 9, 2020 among 1,113 U.S. adults.)

**Many are looking forward to road trips**

Once stay-at-home orders for your area are lifted, or thinking about now if they already are, to what extent do you agree or disagree with the following statements? (Total agree)

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will be afraid to travel internationally for quite some time.</td>
<td>51% 58%</td>
</tr>
<tr>
<td>I will plan a driving vacation to a rural or scenic destination in the U.S.</td>
<td>32% 43%</td>
</tr>
<tr>
<td>I do not think I will feel financially comfortable planning a vacation.</td>
<td>41% 41%</td>
</tr>
<tr>
<td>I will be afraid to travel in the U.S. for quite some time.</td>
<td>38% 40%</td>
</tr>
<tr>
<td>I will plan a driving vacation to an urban destination in the U.S.</td>
<td>27% 34%</td>
</tr>
<tr>
<td>I will plan a flying vacation to a rural or scenic destination in the U.S.</td>
<td>19% 22%</td>
</tr>
<tr>
<td>I will feel safer in vacation rentals than in hotels</td>
<td>17% 22%</td>
</tr>
</tbody>
</table>

(Source: Ipsos Coronavirus Consumer Trackers conducted between April 17 and 20, 2020 among 1,111 U.S. adults (wave 2) and between June 8 and 9, 2020 among 1,113 U.S. adults (wave 7).)
This is the Goldilocks vignette — not too horrible, not too great. We get some of the science right, and some of the stimulus investment right. We also get some of it wrong. The results are mixed.

The recovery is slower than it could be, but in the end, we recover. We’re not forecasting that this timeline is in some way the “middle, and therefore likely” one. For our editorial purposes here, it’s just as plausible as the rest.

**TESTING:** Testing continues to be sporadic. The “states are in charge” approach yields a patchwork of coverage as states compete with each other for supplies. This, coupled with the uneven opening of businesses, means that shelter orders are extended or reinstated in many areas and the virus continues to flare up in hotspots around the country. People are eager to get back on track and frustrated and anxious as many states cancel summer programs for kids and hint that schools might not reopen in fall.

**REGIONALISM:** The economy in many sectors stays closed for longer than many want, but untold lives are saved. This is largely due to a failure to generate enough trustworthy testing kits to allow for people to trust that “it’s safe to come out.” Much like China’s early attempts to open its economy, just because businesses were open in some places didn’t mean that people would come. But none of this is universal as some customers are happy to return. The federal government, continuing trends from the beginning of the crisis, rewards states that are loyal with tests and stimulus money and punishes those that try to stay closed to flatten their own curves by withholding federal aid. This leads to tension among the states, including expansion of border checks for travelers. Interstate business travel fails to rebound as state cases slow at unequal rates. People restock in preparation for a return of lockdowns in the fall and settle in for what looks to be a long recession.

**EMPLOYMENT:** Many bars and restaurants and other small businesses have been closed too long and can’t reopen. Government stimulus fails to revive them directly but the bailouts to financial services are used to jumpstart new businesses. This, however, is a long-term return to pre-crisis levels and a recession with high unemployment drags on. With the continuation of social distancing in many regions and the re-closing of some that opened too early without proper testing, more and more goods and services wind up being moved to online or BOPIS. There is a large shift in service workers from their previous jobs (in hospitality especially) to gig-economy delivery jobs with low wages and few benefits. But high unemployment means they have little power to bargain or organize for better rights.

**STIMULUS:** After two large rounds of stimulus, Senate leader Mitch McConnell begins talking about the debt as a “serious issue” and talks bog down on any further stimulus. Money continues to be doled out with little oversight. In the end, $3 trillion+ leads to some short-term patches for the economy but the federal government is tapped out before much aid flows to cash-strapped state and local governments. This contributes to the prolonged recession. Uncertainty is the new norm for Americans, who continue to see brief hopes dashed by political and social realities.

**ELECTIONS:** The elections are bumpy. The Republican Party, which has long raised the specter of voter fraud, continues to ramp up this rhetoric leading up to the election, causing fears that the results will be contested. Indeed, there are numerous accounts not necessarily of fraud, but of intimidation and irregularities due to the unprecedented volumes of mail-in ballots. Once the ballots are counted, the results are clear enough that both sides accept the outcome.

Vignette Two: Uneven testing and reopening; fall lockdown; a slow road to recovery.
Would-be vacationers worry about catching or spreading the virus
What part of the journey to your vacation is most concerning? You may select up to three.

- Travel for business any amount
- Never travel for business

The possibility of getting sick: 50% 57%
Being around other people: 36% 53%
The cleanliness of the accommodations: 33% 36%
The cleanliness of the destination itself (attraction, theme park, hotel, etc.): 35% 32%
Having to use public bathrooms: 23% 25%
Being in an airport or train station: 21% 27%
The possibility of getting others sick (other tourists, workers at the destination, friends and family you might visit, etc.): 26% 21%

(Source: Ipsos survey conducted between June 12 and 15, 2020 among 1,005 U.S. adults. Question not asked of those saying they would feel comfortable taking a driving vacation or a vacation by plane or train right now. Includes 265 business travelers and 476 non-business travelers.)
“Hotels have to work harder to make people feel comfortable.”
- Michael Baer

Because of the mixed and uneven response to the crisis—and the recurring viral flare-ups in regional hot-spots, consumers remain uncertain about the safety of travel. Though most feel open to initiating some types of travel plans, they mostly involve easier to get to, domestic locations. Domestic travel focuses on regions that have avoided the worst of the virus. A wider disparity occurs between the non-affluent and the truly affluent on their approach to travel during this period. Affluent travelers feel more confident in air travel, due to the greater distancing and higher-end service in the front of the plane vs. the back. Airlines cater to high-end business travelers by promoting a higher tier of service (and confidence of cleanliness) in first- and business-class travel. There’s a lot of focus on hotel protocol for maintaining proper social distance and for sanitization. Hotels have to work harder to make people feel comfortable—and need to provide assurances and cues of their achievement of highest levels of cleanliness and safety. Because of this, small hotels struggle to deliver and to instill that confidence. The ultra-affluent find their own ways to “buy” safety while on vacation. They book high-end villas—or even entire hotels—to keep “social distancing” even on vacation. High-end hotels cater to these high-end consumers with offers on multiple rooms and isolated sections of hotels. Those who can afford it take private jets.

Michael Baer
Senior vice president, team lead, Ipsos Affluent Intelligence

Top steps to ease traveler concerns

For hotels
What steps are most important for a hotel to take to encourage you and make you more comfortable visiting?

- Health screenings of employees: 38%
- Requiring guests to wear masks in public areas: 37%
- Ensure rooms are empty for a period of time between stays: 30%
- Travel for business any amount: 50%
- Never travel for business: 48%

For airlines
What steps are most important for an airline to take to encourage you and make you more comfortable traveling by plane?

- Requiring face masks for passengers: 50%
- Requiring face masks and gloves for crew: 49%
- Removing or blocking middle seats: 49%
- 73%
- 62%
- 59%

(Source: Ipsos survey conducted between June 12 and 15, 2020 among 1,005 U.S. adults. Question not asked of those saying they would feel comfortable staying a hotel or flying right now. Includes 225 business travelers and 407 non-business travelers who stay in hotels and 237, business travelers and 397 non-business travelers who fly. Top three responses.)
This timeline is grim. Let’s not sugar-coat it. But it’s also avoidable. It takes the premise that America fails to overcome its divisiveness and work together toward common goals of getting the economy righted while also keeping people healthy.

Taken to its ultimate extremes, this ends badly. Just because it’s horrific, however, doesn’t make it impossible. It’s worth keeping some of these dark thoughts in the back of your head as you plan.

**TESTING:** Testing is ineffective and not well distributed. Lack of FDA approval for antibody tests, counterfeit tests and more, mean that we never have a clear picture of how widespread the illness is or how to measure the effectiveness of various measures to combat the spread. Therefore, the disease itself continues to rage and even though the economy is open, people continue to die at an alarming rate.

Living with the disease, social distancing, and wearing PPE when in public becomes the norm for many. For those who don’t follow these guidelines, protests and tensions persist as resentment grows on both sides: those who resent the lockdowns; and those who resent people whose defiance of restrictions only prolongs those restrictions and the death and suffering of many.

**REGIONALISM:** Almost exclusively due to a lack of widespread national testing, even parts of the economy that do open wind up closing again because of continued high rates of infection. Tensions grow between areas that are still under various degrees of social distancing and lock-down and those that aren’t. And tensions continue to boil up among those who prioritize their personal sense of freedom over the restrictions put in place for the good of the society writ large. Border checkpoints — some official and some set up by local extremist groups calling themselves “militias” — become more commonplace.

Xenophobia increases with regard to people from Asia and of Asian descent, but it’s joined by a growing sense of geltanophobia — or fear of your neighbors. State by state and city by city, urban vs. rural, Americans turn on each other.

Fears of a new form of civil war grow.

**EMPLOYMENT:** Small businesses and retail take a massive, prolonged hit and many never recover. The shift to online and BOPIS (Buy Online Pick up In Store) accelerates rapidly. But this is a huge problem for real estate, especially in the suburbs, exurbs and rural areas.

The revival of main streets comes to a crashing halt. K-12 schools don’t reopen in fall leading to a continued childcare/ work-from-home crisis and bifurcation between those who can work remotely and those who can’t. Many colleges and universities — also unable to open — fail, creating a crisis of higher education.

Bickering at the federal level means that the stimulus is too slow and too rife with corruption and graft to be effective. The federal government tosses responsibility to the states who aren’t used to having the lead in many programs and services and aren’t equipped (financially or otherwise) to handle them. This leads to intrastate competition, infighting and regional hegemonies that do little to unify or heal the nation and exacerbates existing blue and red state fault lines as well as rural/urban tensions within states themselves.

**STIMULUS:** Stimulus money runs out in May and Congress can’t agree on further packages amongst partisan infighting. Governments at all level begin huge cuts in services and investment. Our infrastructure begins to literally collapse around us. The social safety net is depleted when people need it most. All of the “lack of retirement planning" tropes about the Boomers are exacerbated. The huge generational transfer of wealth that was supposed to save the Millennials vaporizes. The chasm between the 1% and the 99% widens to unsustainable levels. Fears of a “French revolution" rise.

**ELECTIONS:** State, local and federal authorities fail to coordinate plans for a massive mail-in ballot campaign which is wholly exacerbated by the default and subsequent privatization of the USPS, for which the Senate blocked a bailout supported by the House. Rampant reports of possible hacking, and, similar to the Wisconsin primary, accusations of voting locations being closed based on voter demographics for those who are allowed to vote in person. But the mail is a substantial problem to the point that the validity of the results is questioned after Biden’s apparent victory. The GOP challenges the results in every state they don’t win, and the court cases lead to a constitutional crisis.
In vignette three, the future of travel is scary. If we can’t work toward common safety standards, will travel as we know it survive?

The travel and hospitality industry will have a very difficult time surviving without at least moderate return to normal patterns of business travel. Under the worst case, airlines and hotels will return to capacities under 20%, which will not be sustainable for an extended period of time. Given the economic realities and political pressures to get back to “business as usual,” airlines and hotels will need to focus nearly all attention on the “essential business travelers.” The long-term implications of a sustained pandemic on the industry will be catastrophic and depend on government support to keep business travel and accommodations available. Contraction and consolidation within the industry will be common. A prolonged pandemic will force major and sustained shifts in how those who previously traveled for work will continue to do their jobs. The longer the low level of business travel persists, the longer it will take to return.

Mike Bellmont
Senior vice president, U.S. Senior Client Officer, Ipsos

Brand shakeout is inevitable. The pressure on brands is going to come from at least three sources: customers, hotel owners, and employees. Customers are going to be looking for meaningful and identifiable differences between brands. Those brands that are not able to establish clear and distinct “swim lanes” are going to perish. Hotel owners are going to be putting brand value under increased scrutiny. Those brands that cannot show a clear and compelling delta between value delivered (top line occupancy, rate and reservations delivered) and value extracted (fees, royalties and other charges) are going to fall out of favor. Employees are going to be returning to brands that they trust and respect. Those brands that abandoned their employees with no heart are going to have the hardest time staffing for increased business. As better brands emerge, I fully expect a few brands to be phased out and/or consolidated.

Chekitan Dev
Professor, School of Hotel Administration, Cornell SC Johnson College of Business

The economic woes and ongoing battle to control the virus deal a serious blow to travel and hospitality companies. Many private and small hotels go bankrupt, and many hotel chains also struggle to stay viable. Many licensed, private owners of chain-owned hotels can’t keep the lights on. Airlines also struggle. Business travel remains very soft, most companies continue to prohibit all but the most urgent trips both for safety and also to minimize costs during the economic crisis. Add to this the fact that airlines must operate at well below capacity when they do fly in order to maintain social distancing, so they continue to lose money daily. The government must intercede with cash infusions as they did with the auto industry during the Great Recession. Most airlines file for bankruptcy, and there is consolidation within the industry. This makes travel truly an exclusive and very high-end pursuit. The ultra-rich are the only ones able to rise above it all, by flying private, by renting villas, by paying for a level of care and cleanliness that they can afford. We also see the rise of high-end RVs and growth of “glamping” for the ultra-affluent to enjoy discovery and experience, all while keeping to themselves. However, most consumers and the mass-affluent continue to defer travel and stay home or take road trips.

Michael Baer
Senior vice president, team lead, Ipsos Affluent Intelligence

Road warriors expect to be grounded more

Compared to the time before the COVID-19 pandemic began, to what extent do you agree or disagree with the following statements: (Total agree)

- I will travel less often for business: 55%
- I think my company will reduce its travel budget: 51%
- I will have fewer face-to-face meetings that require travel: 58%
- I am willing to travel, but my clients are canceling meetings: 37%
- I will have more ‘virtual’ meetings instead of traveling: 65%
- I will attend fewer trade shows and conferences: 55%

(Source: Ipsos survey conducted between June 12 and 15, 2020 among 1,005 U.S. adults, including 314 business travelers.)
Even though the demand for certain types of safe travel returns, consumer fear and fierce government regulation prevent widespread tourism. Short-term vacation rental platforms, overrun with ever-changing restrictions, prohibit rentals on their sites, forcing owners to shut down, halting travel, tourism, and the short-term rental economy.

Lauren Hudson
Vice president, team lead, Ipsos design studio; and co-founder, chief brand architect of the Wildwood Collective short-term rental company

There will be virtually no travel, at least not at a level that creates meaningful room tax collections for communities. No visitor spending will eliminate the infusion of the outside funds needed to help a community grow and thrive. Take away visitors and you eliminate opportunity for many people within the community. The hospitality industry provides a pathway to the workforce for many young people and people from underserved communities.

The industry also provides an outlet for the creativity of chefs, artists, musicians and mixologists. The unique aspects of a community’s culture or cultures is buoyed by visitor interest and visitor spending. The essence of a community will erode, if not disappear, in this scenario.

While destinations with “bucket list” attractions, such as the Statue of Liberty or Mount Rushmore may see a certain number of outside travelers, mid-size and small-size communities that rely upon their “vibe” for visitor attraction will be limited to regional visits from people seeing family and friends.

This will not contribute to overnight stays and corresponding room tax collection. Travel itself may revert to a luxury for the few who can afford to meet the high costs of this new tourism reality. Travel as an egalitarian leisure and learning experience may disappear.

Rob Gard
Director, PR & Communications, Destination Madison

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Flight delays: People are wary of returning to the skies
When will you feel comfortable... (Percent total)

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<thead>
<tr>
<th>Activity</th>
<th>0%</th>
<th>1%</th>
<th>2%</th>
<th>3%</th>
<th>4%</th>
<th>5%</th>
<th>6%</th>
<th>7%</th>
<th>8%</th>
<th>9%</th>
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<td>Visiting a national park or other scenic area</td>
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<tr>
<td>Staying at a vacation rental (like an AirBnB)</td>
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<tr>
<td>Visiting a theme park</td>
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<td>19</td>
<td>19</td>
<td>18</td>
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</tbody>
</table>

(Source: Ipsos survey conducted between June 12 and 15, 2020 among 1,005 U.S. adults.)