

# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 21

RESEARCH FINDINGS

August 3, 2020

Destination  Analysts

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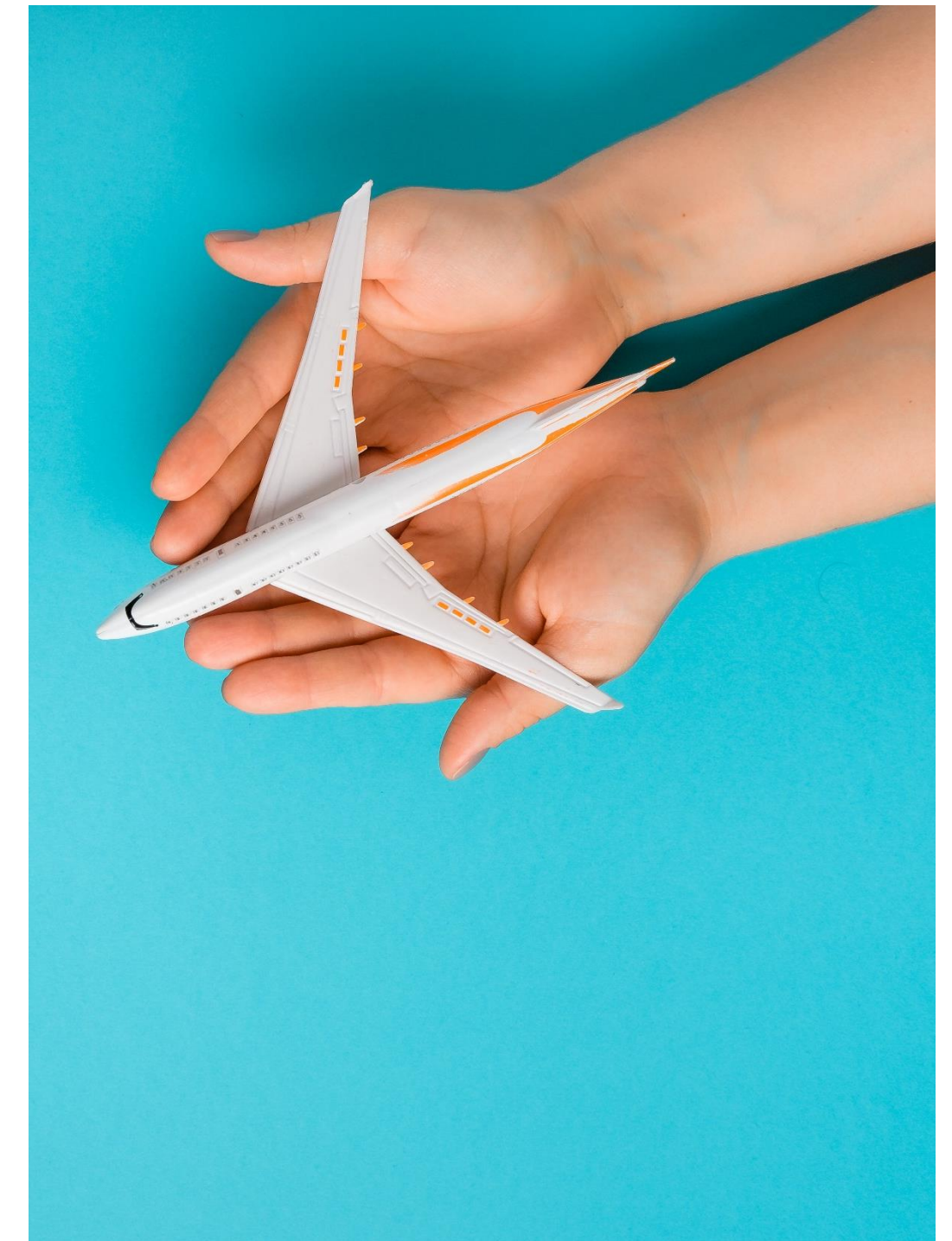
# Project Overview

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The goal of this research is to understand and track the widespread disruption and damage to the travel and tourism industry caused by the coronavirus. To do so, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the 21st wave of this project are presented in this report. The survey is being conducted weekly to track traveler sentiment and generate insight into when tourism businesses can expect demand to return.

The survey questionnaire used here is multifaceted and asks a representative sample of adult American travelers to report their experiences and feelings around the current pandemic situation. We expect the value of this survey to increase as additional waves of the project are completed and we can see emerging trends. For now, we present this data primarily on topline with our additional observations included.

The 21st wave of this survey was collected from July 31st-August 2nd, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,224 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



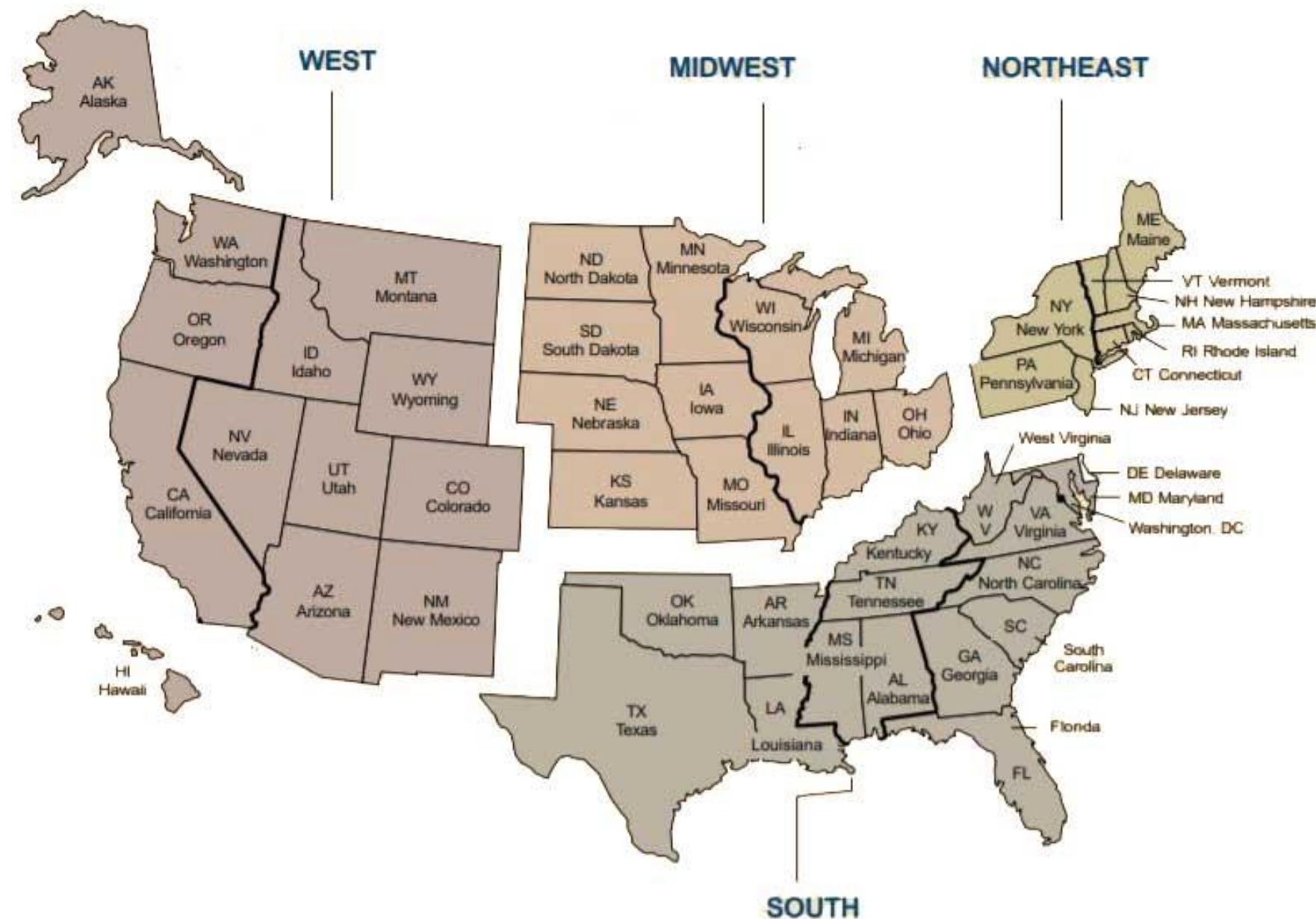
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# Project Overview

**Data weighting.** The survey sampling plan used in this project collected approximately 300 fully-completed surveys in each of the four regions shown in the map below. The overall results presented in this report are weighted to reflect the actual populations of the regions.

**Moving forward.** The COVID-19 situation is rapidly evolving, and its impact on the travel industry is far from clear. As a result, Destination Analysts plans to conduct this survey weekly into the foreseeable future. Weekly reports have been, or will be, made on the following schedule at right.

Map of U.S. Showing Survey Regions



	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
Wave #11	May 22-24	May 25
Wave #12	May 29-31	June 1
Wave #13	June 5-7	June 8
Wave #14	June 12-14	June 15
Wave #15	June 19-21	June 22
Wave #16	June 26-28	June 29
Wave #17	July 3-5	July 6
Wave #18	July 10-12	July 13
Wave #19	July 17-19	July 20
Wave #20	July 24-26	July 27
Wave #21	July 31-Aug 2	August 3
Wave #22	August 7-9	August 10
Wave #23	August 14-16	August 17

# Top Takeaways

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The following are the top takeaways that emerged from Wave 21 of this weekly consumer traveler sentiment tracking study.

- A proportion of Americans shifted from feeling the pandemic would get worse in the next month (53.7% down from 61.5%) to feeling things would be about the same (30.3% from 23.8%). Still, relatively few think things will improve (16.0%).
- With reported cases increasing among younger people, concerns about personally contracting the virus have been elevated among Millennial travelers over the past month.
- With these ongoing feelings about the pandemic, the proportion of American travelers that say they would be happy to see an ad promoting their community for tourism when it is safe has receded to 29.1 percent from 35.8 percent at the end of June.



# Top Takeaways

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- Right now it appears the regional effects and response to the pandemic will have a lingering impact on destination brands. Nearly one-third of American travelers say they are less likely to visit the American destinations that they most associate with Coronavirus-related issues, even after the pandemic ends. In addition, 53.7 percent say that if a destination they are currently interested in visiting experiences difficulty managing the coronavirus situation, they will be less likely to visit even after the pandemic is over.
- American travelers are also more polarized in their travel readiness state of mind, being ready to travel versus not. While 48.5 percent report having leisure trip plans during one or more months in the remainder of the year, sadly, 51.5 percent do not currently have any leisure trip plans in 2020.

# Top Takeaways

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- Those who do not have trip plans this year are, unsurprisingly, more concerned about the virus, and maintaining their safety from it has had a greater impact on their travel plans and their desire to travel. They look to currently be postponing travel to mid 2021. Compared to those who are taking trips this year, they don't travel quite as often (an average of 4 leisure trips per year compared to 5), but are just as likely to be affluent and skew female. Interestingly, they are less likely to be travelers that typically visited National Parks and other types of public lands prior to the pandemic—currently the more popular destinations of choice for the coronavirus period—which perhaps is also impacting their decision not to travel right now.
- Among those that will be traveling in 2020, plans for their next trip are largely well-formed, with beaches, National Parks and other rural areas most cited as the destinations to be visited.
- One of the segments more likely to have trip plans in 2020 are those with school-age kids. When parents of school-aged kids were asked about their likelihood to take family trips this Fall if their children do not have in-person education, 34.5 percent of these parents say they are more likely to take such trips; 21 percent feel less likely.





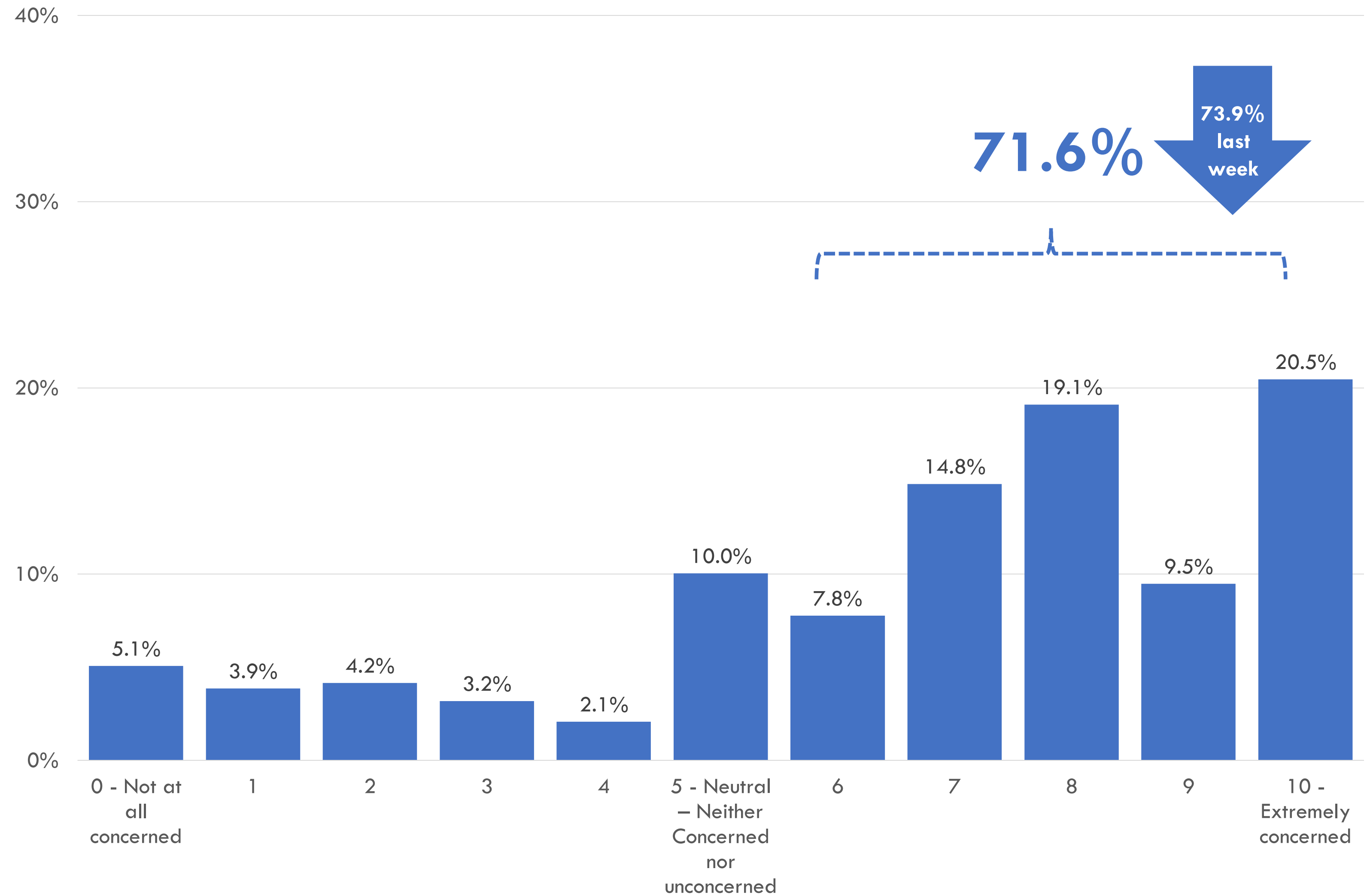
**Section I:**  
**Current Feelings about the  
Coronavirus and Travel**



# Personal Health Concerns

**Question:** Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

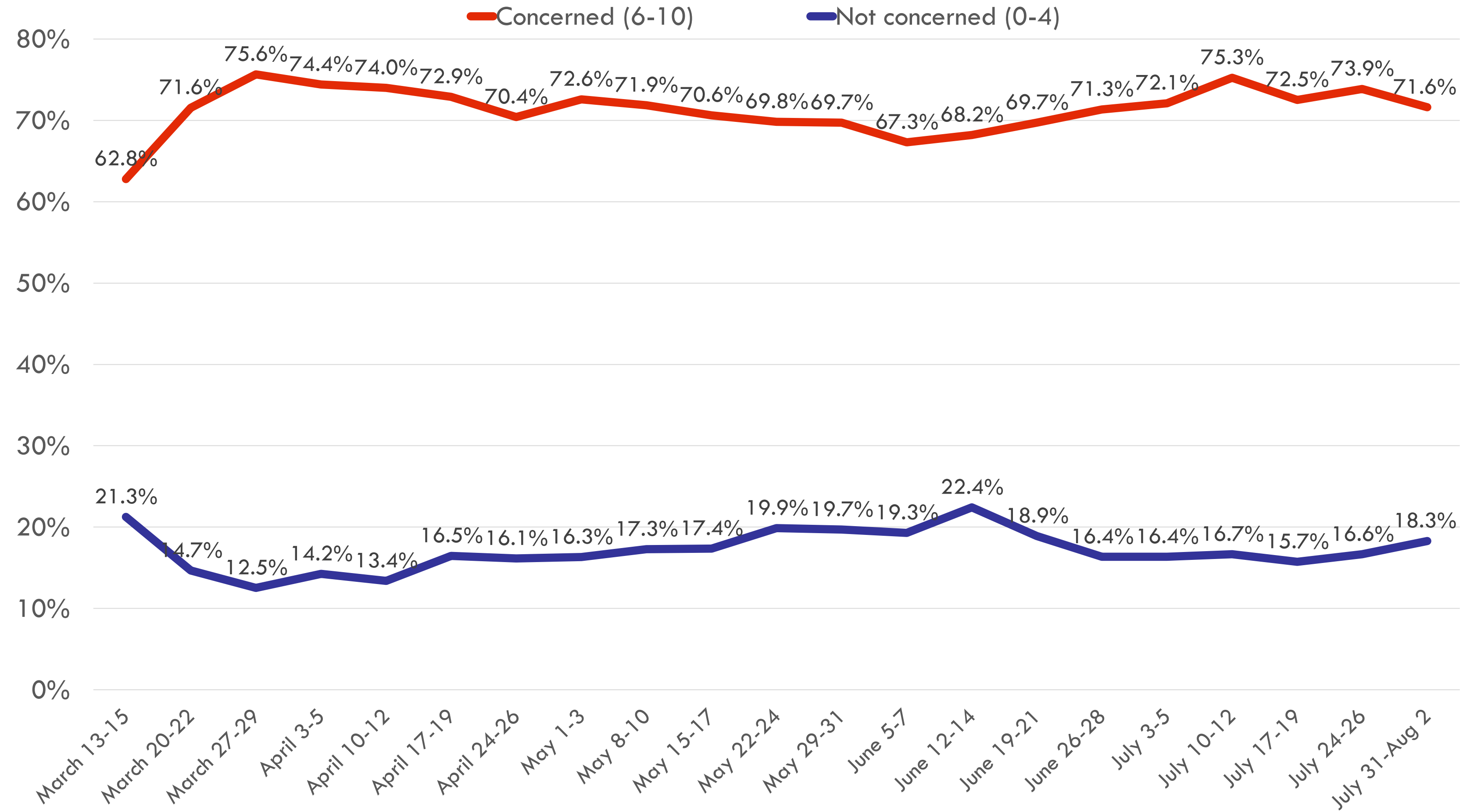
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



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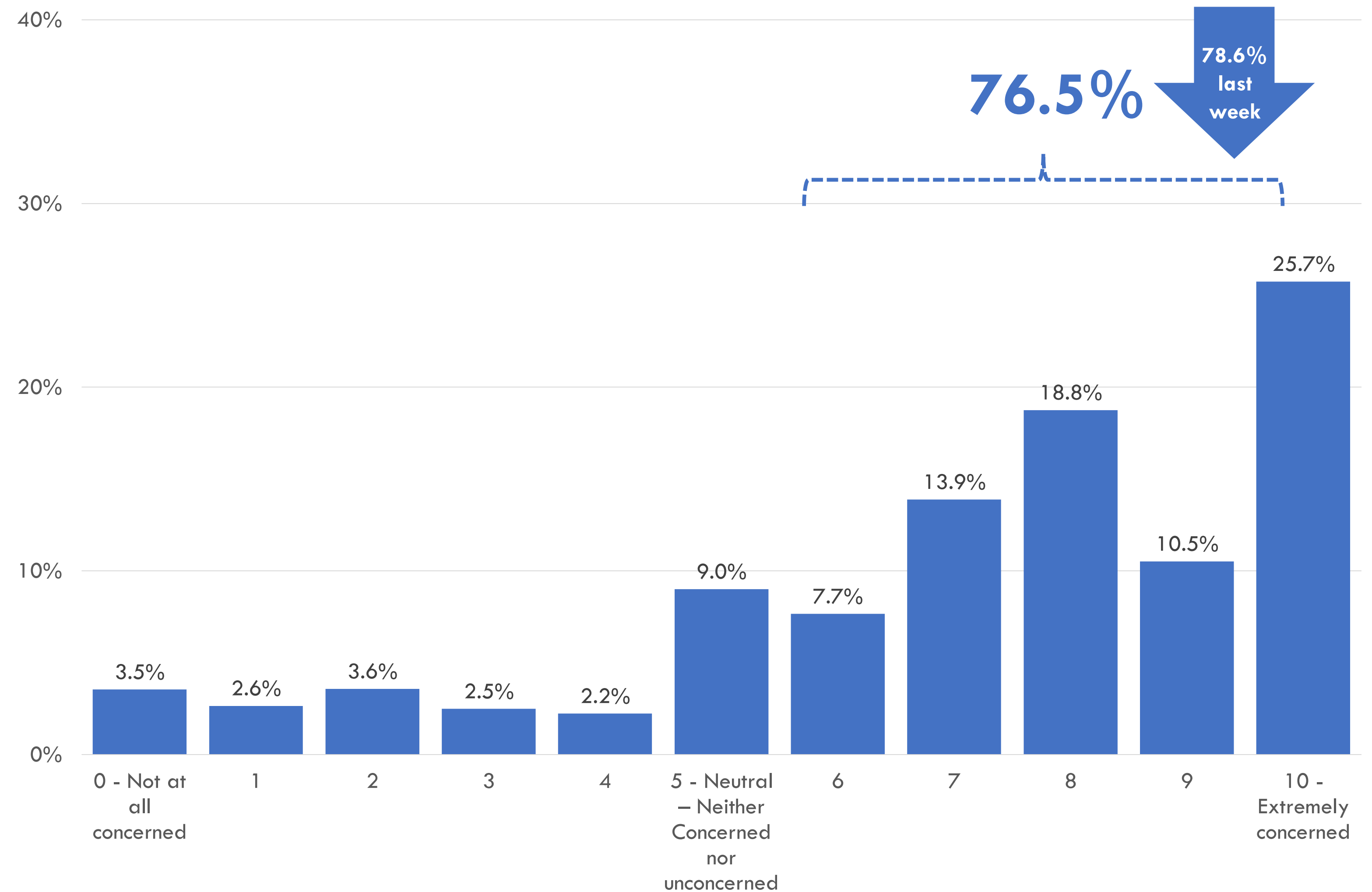
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



# Health Concerns (Family & Friends)

**Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

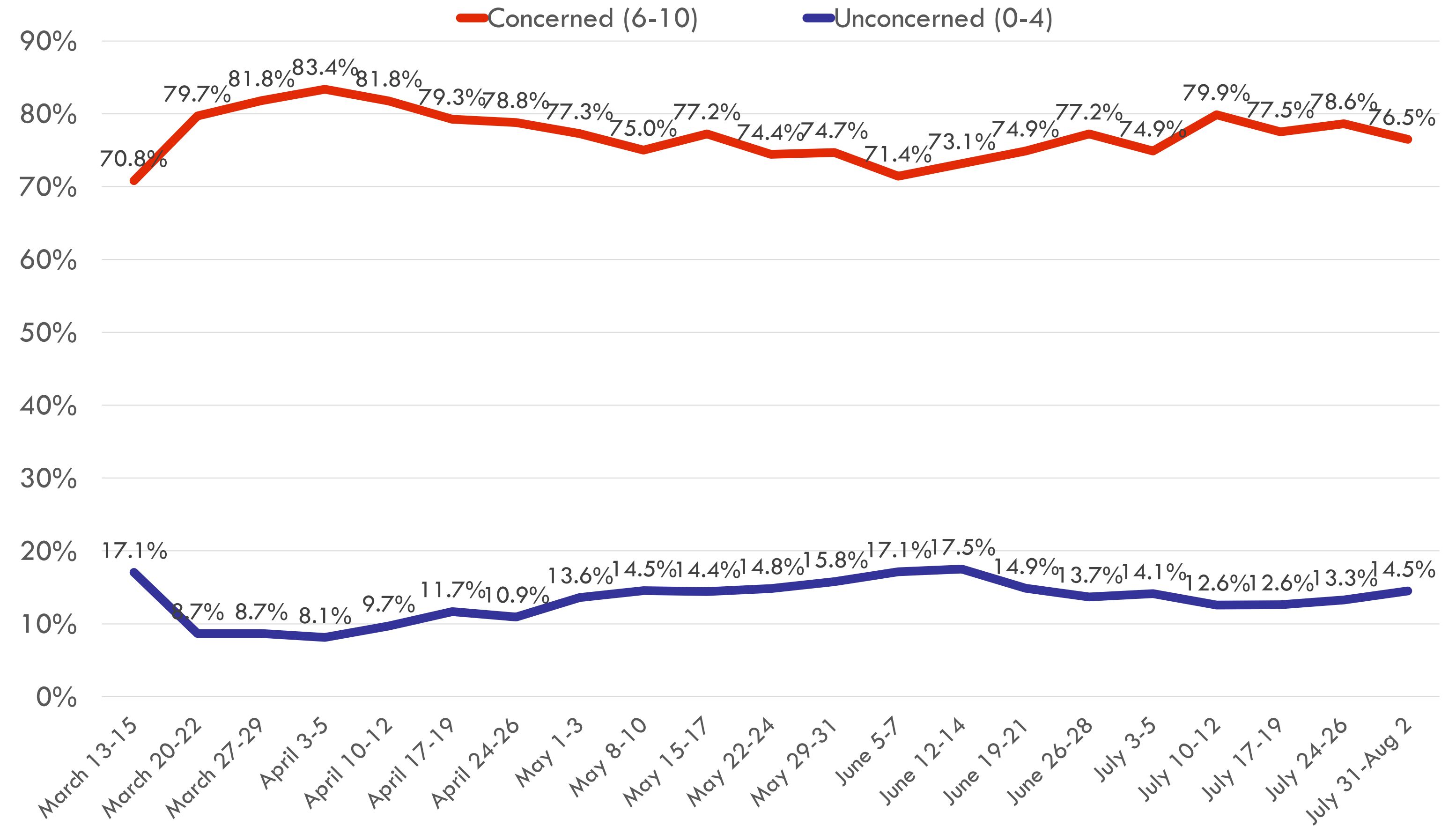
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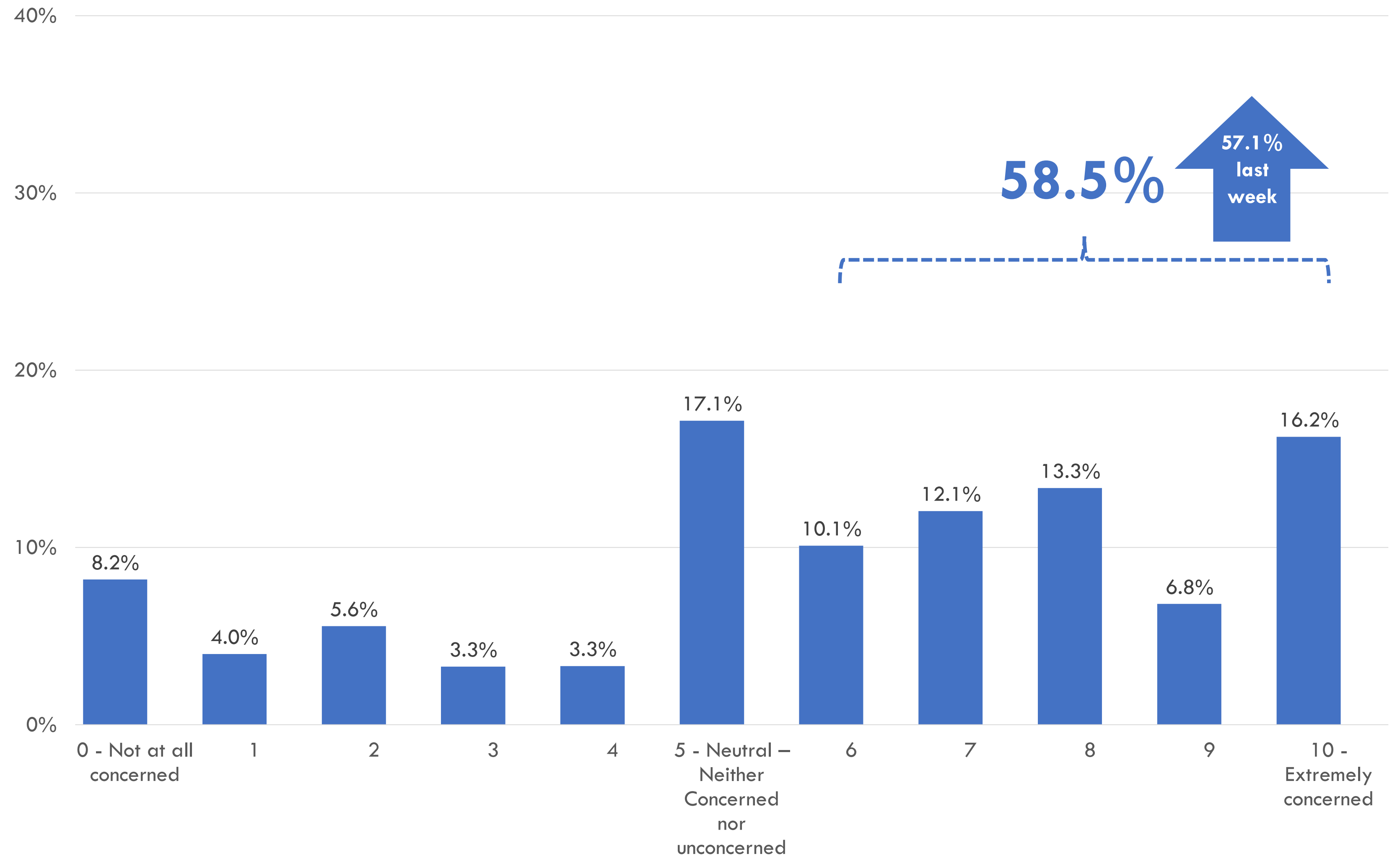
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



# Concerns About Personal Finances

**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

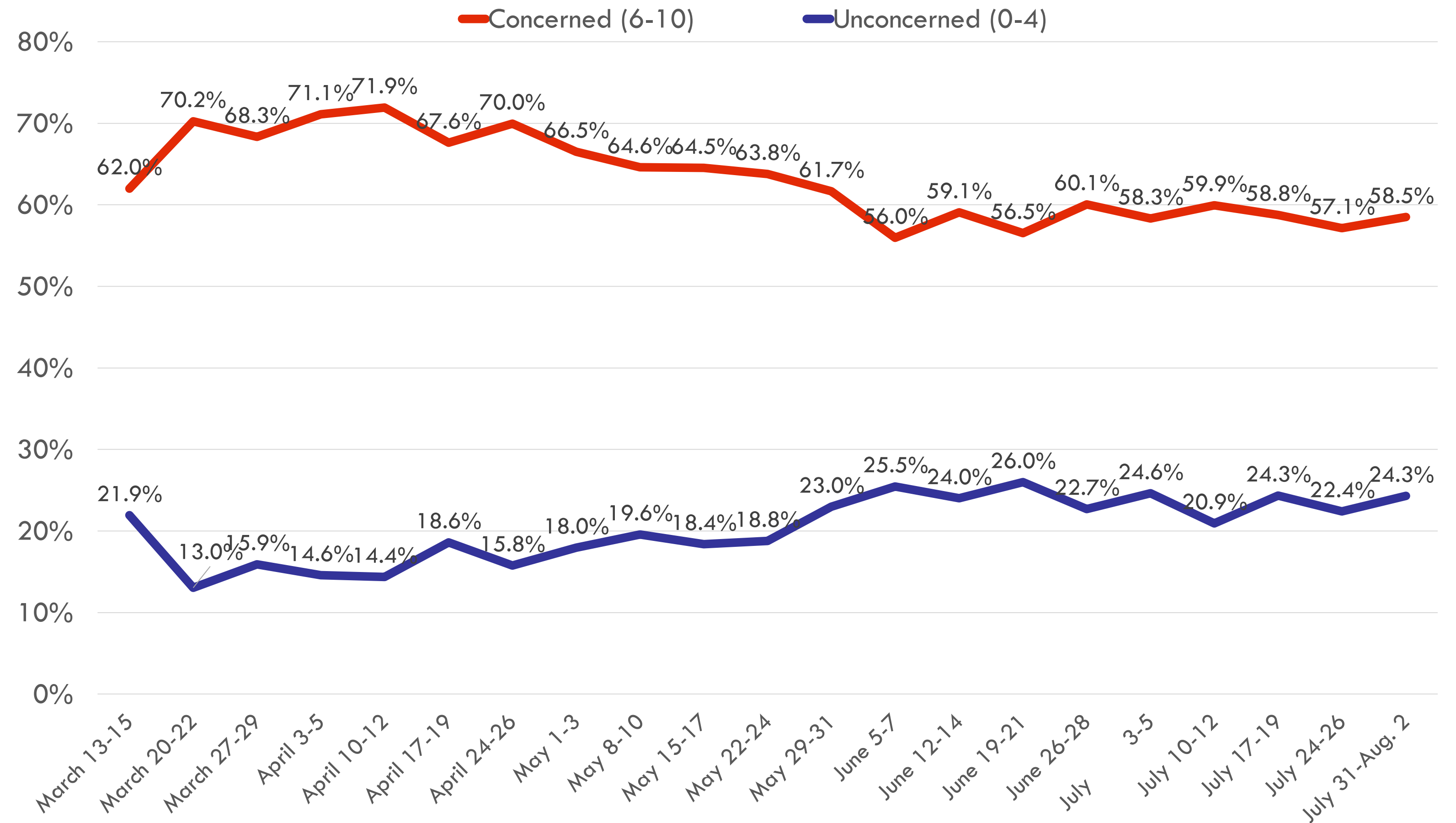
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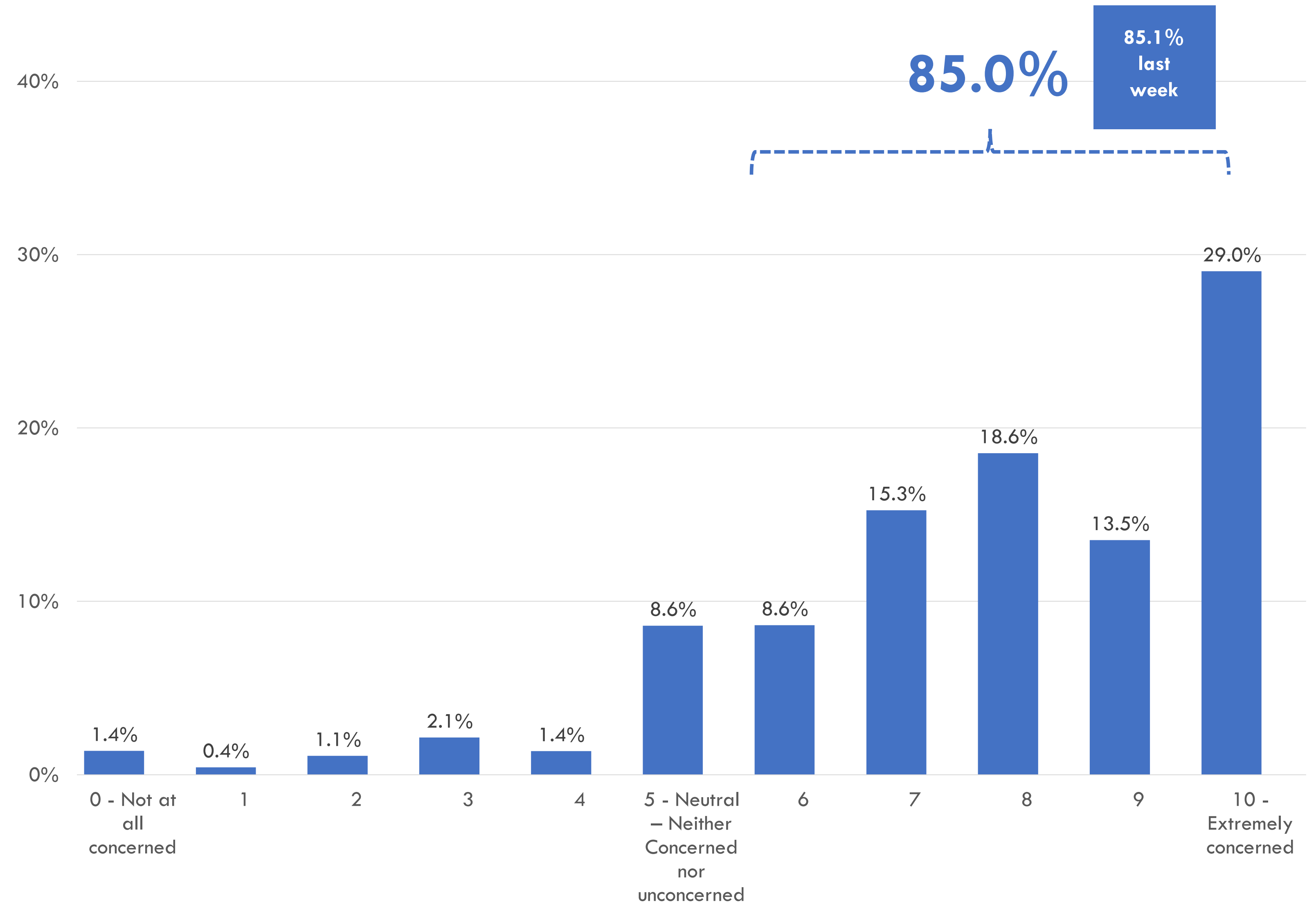
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



# Concerns About National Economy

**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

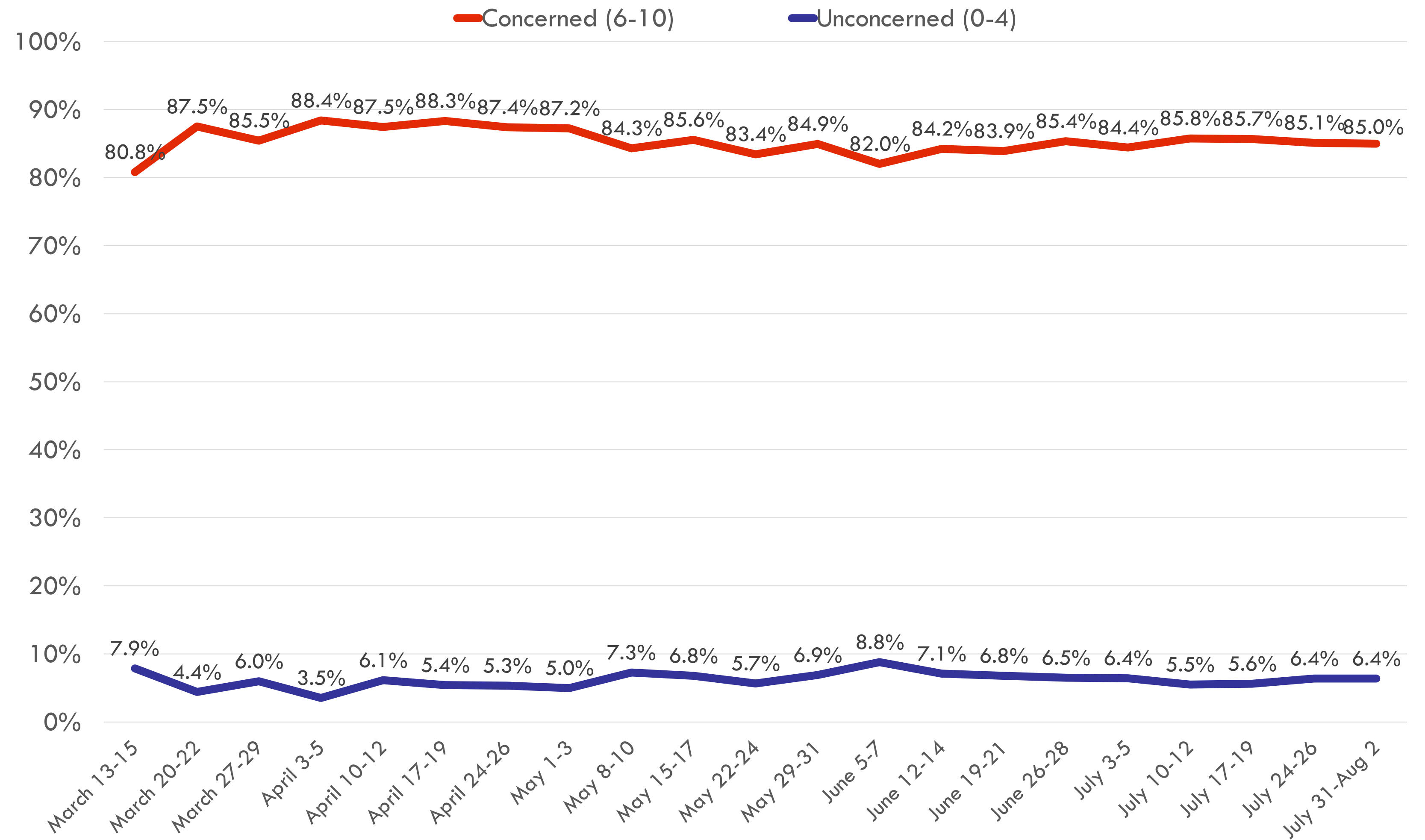
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



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*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



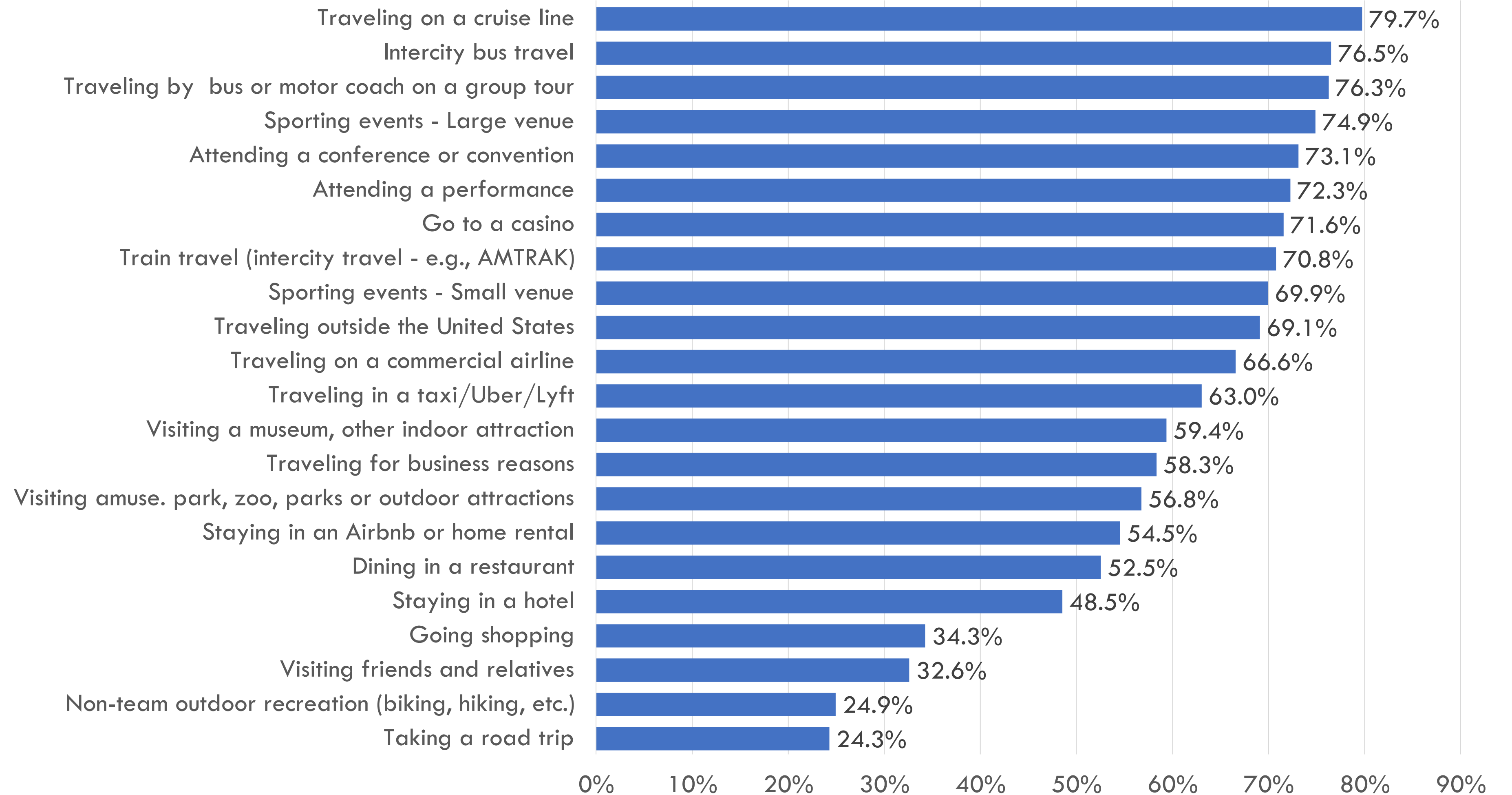


# Perceived Safety of Travel Activities (Wave 21)

**Question: At this moment, how safe would you feel doing each type of travel activity?**

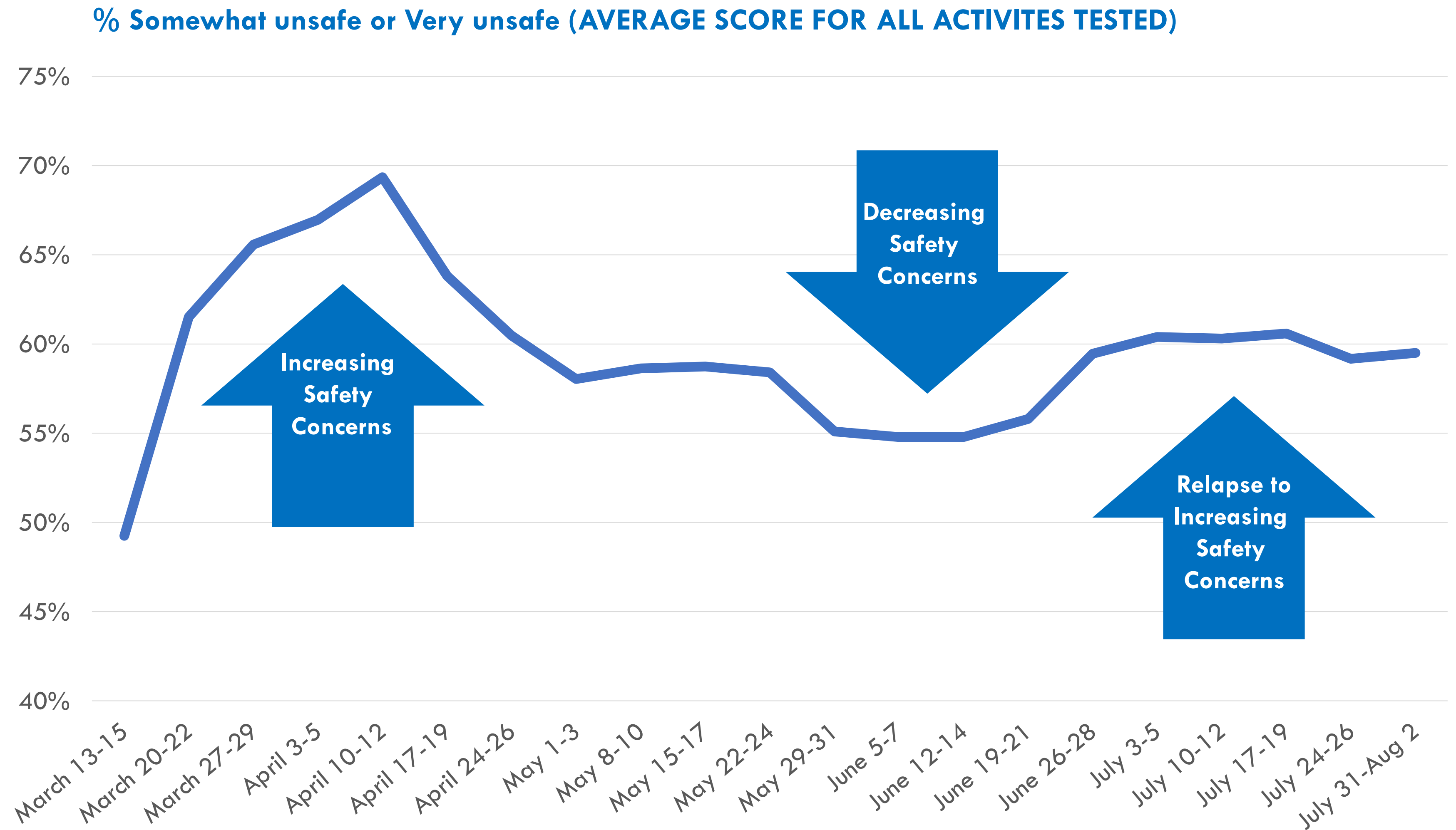
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*

**Top 2-Box Score: “Somewhat Unsafe” or “Very Unsafe”**



# Perceived Safety of Travel Activities (Waves 1-21 Comparison)

**Question: At this moment, how safe would you feel doing each type of travel activity?**

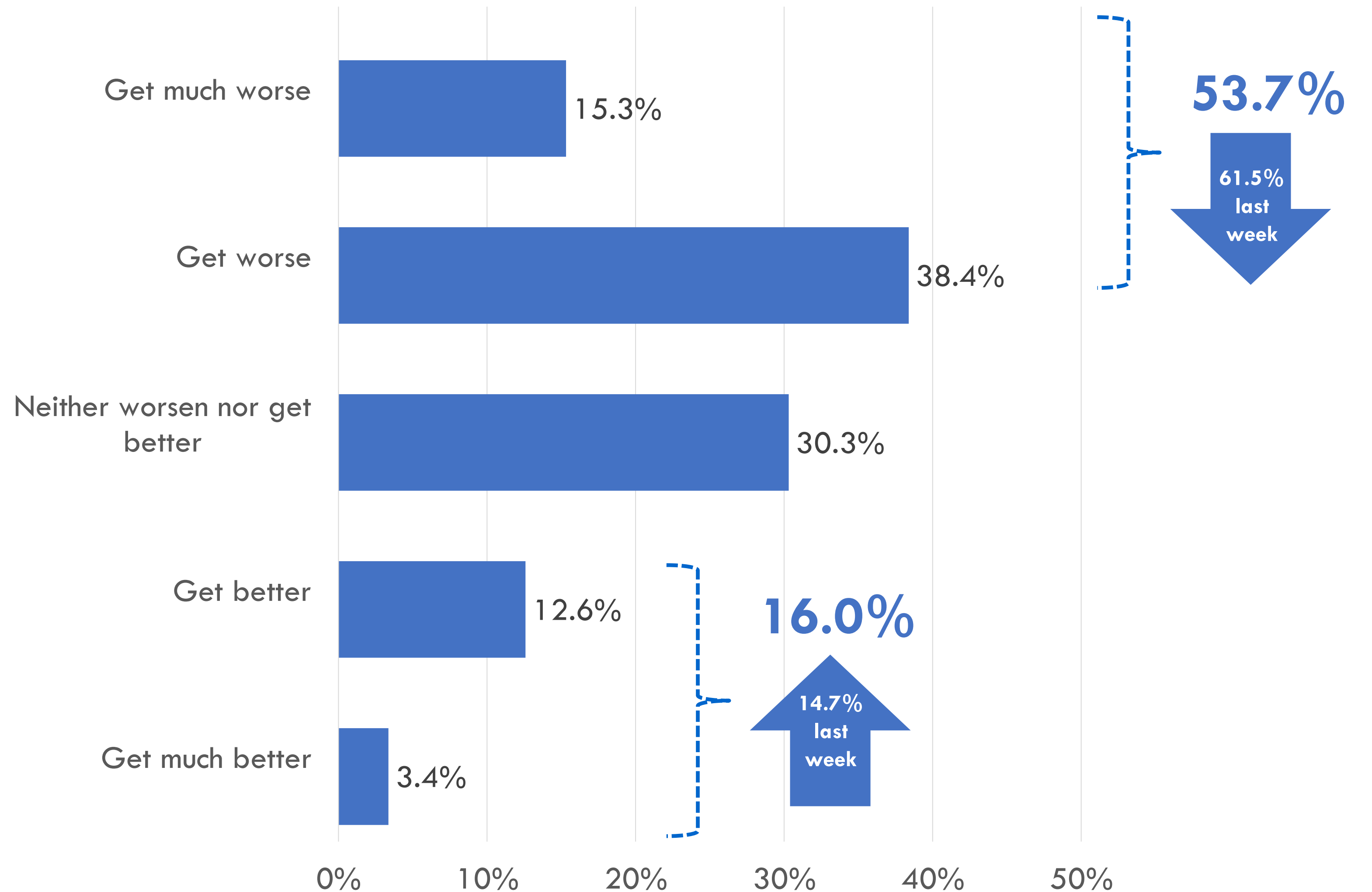


# Expectations for the Coronavirus Outbreak

**Question:** In the **NEXT MONTH**, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will \_\_\_\_\_

(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)

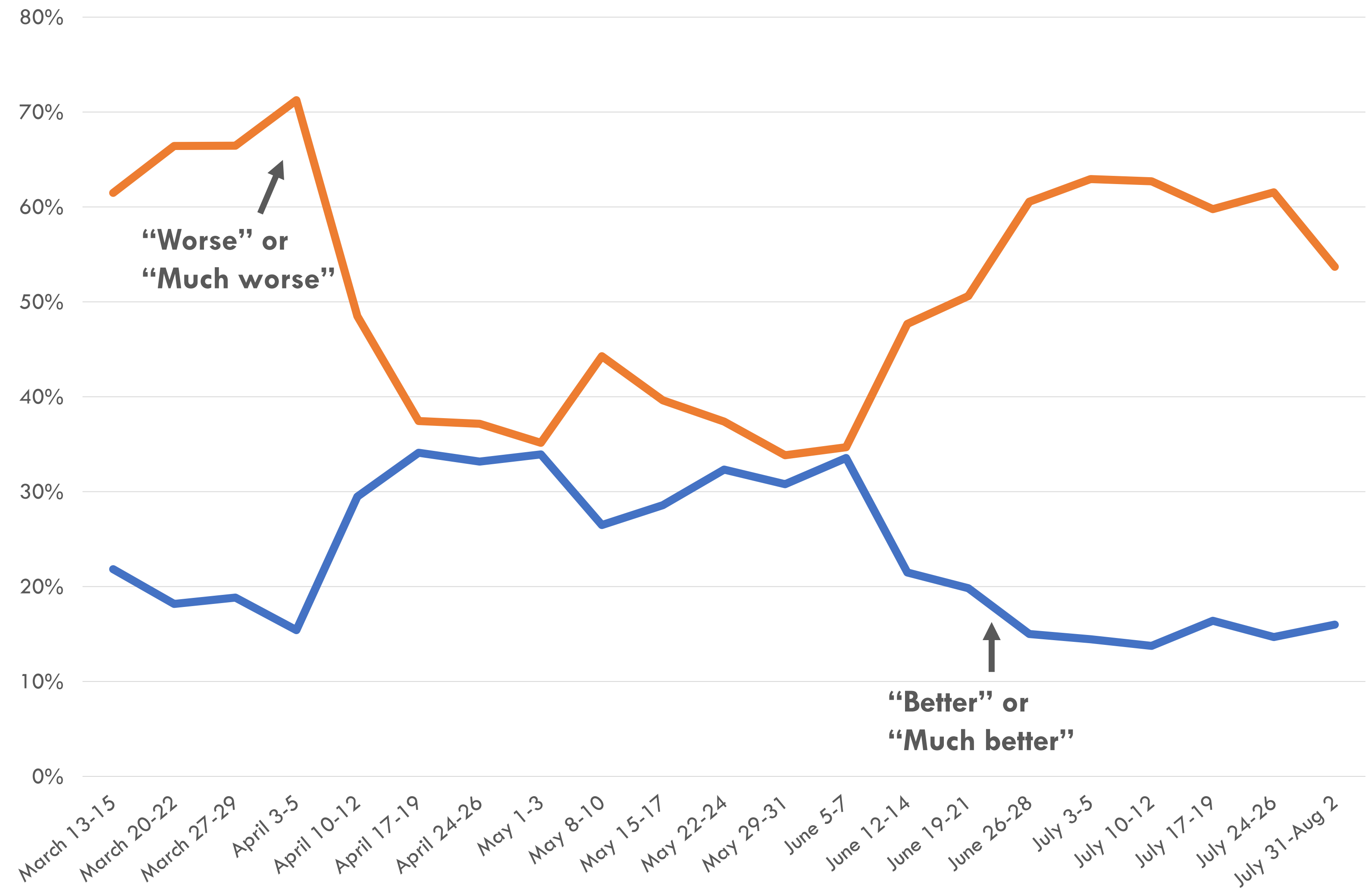


# Expectations for the Coronavirus Outbreak

**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will \_\_\_\_\_

Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, and July 31-Aug 2, 2020)

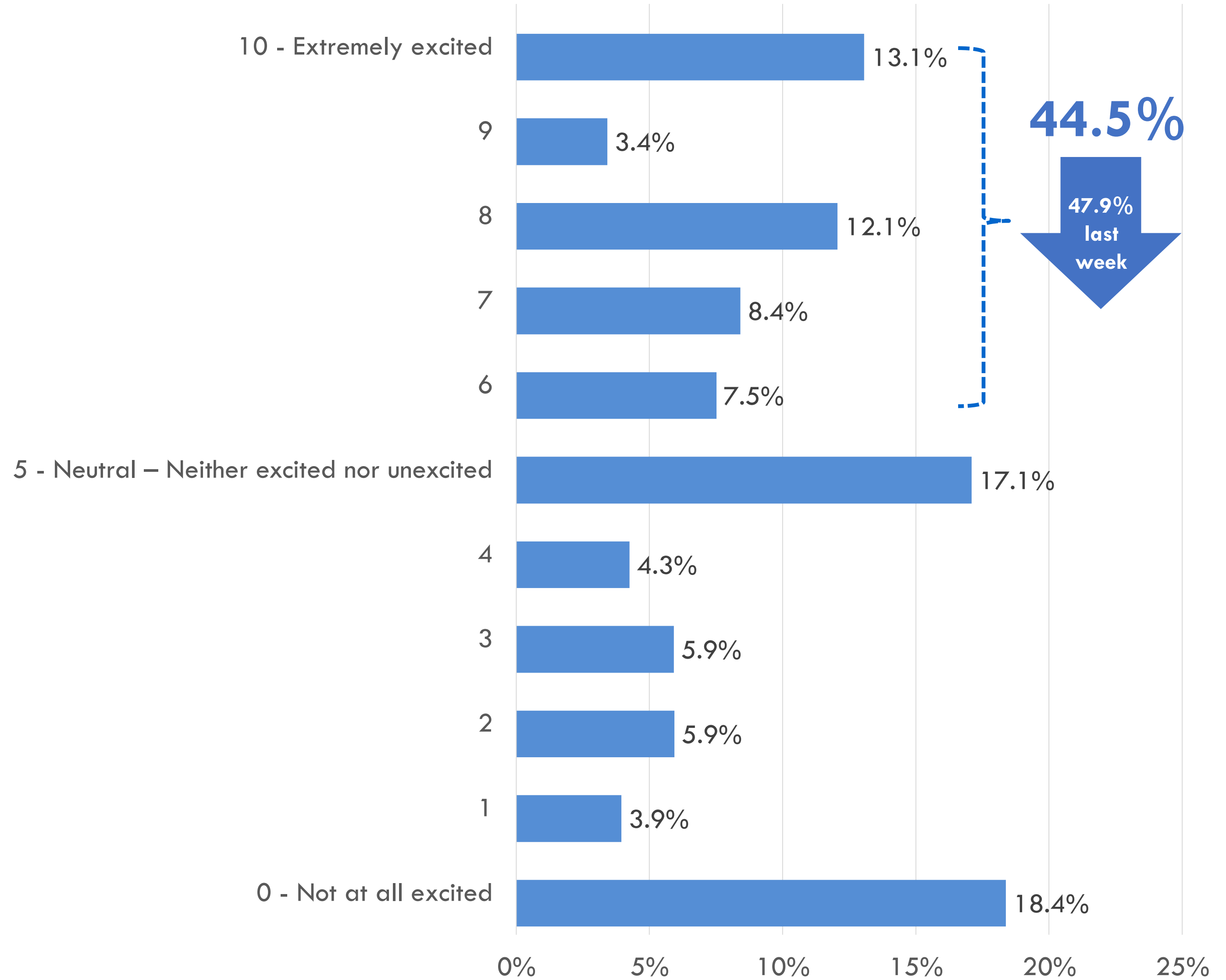


# Excitement to Travel Now

**Question:** Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

**How excited would you be to go? (Assume the getaway is to a place you want to visit)**

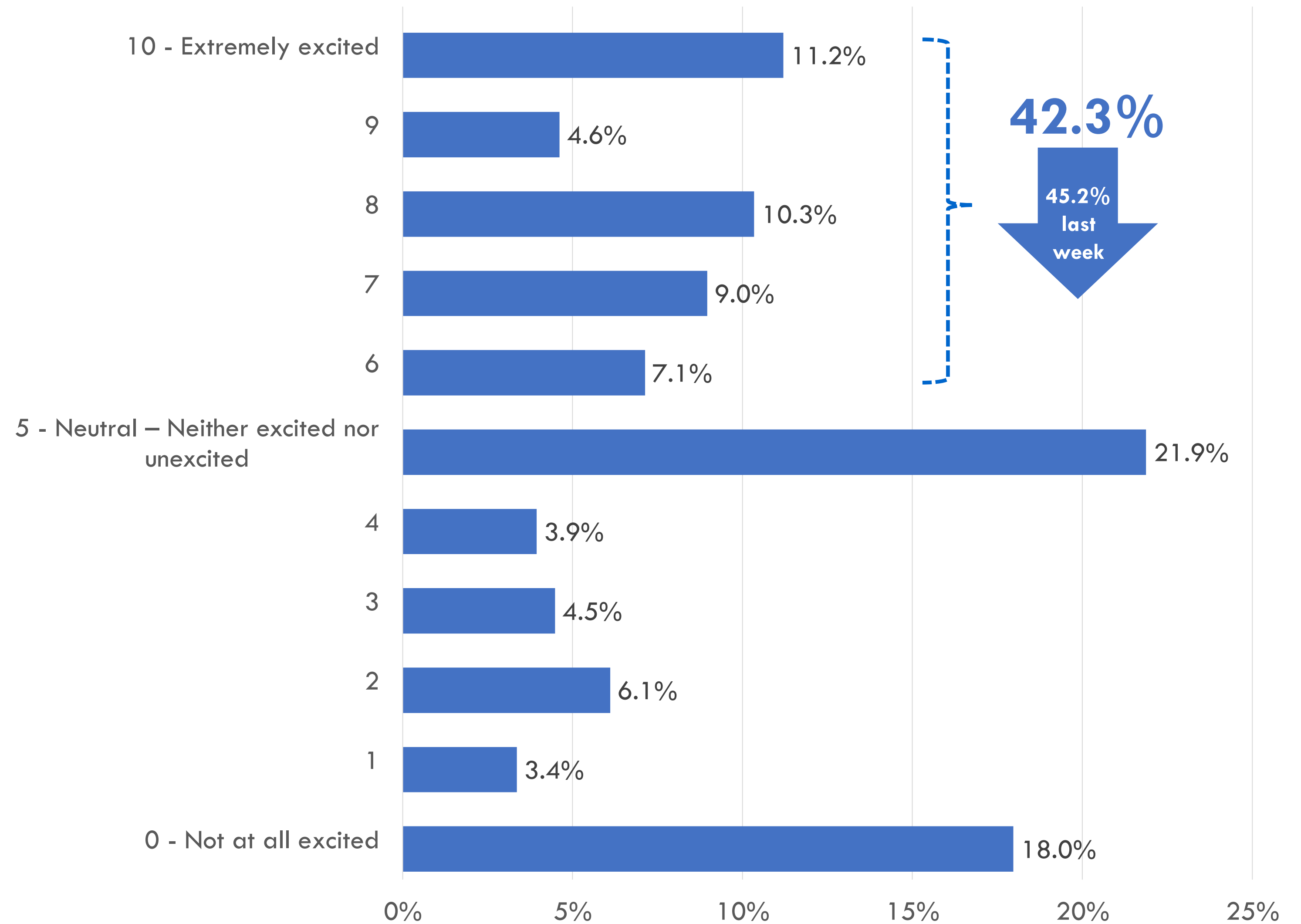
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



# Openness to Travel Information

**Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?**

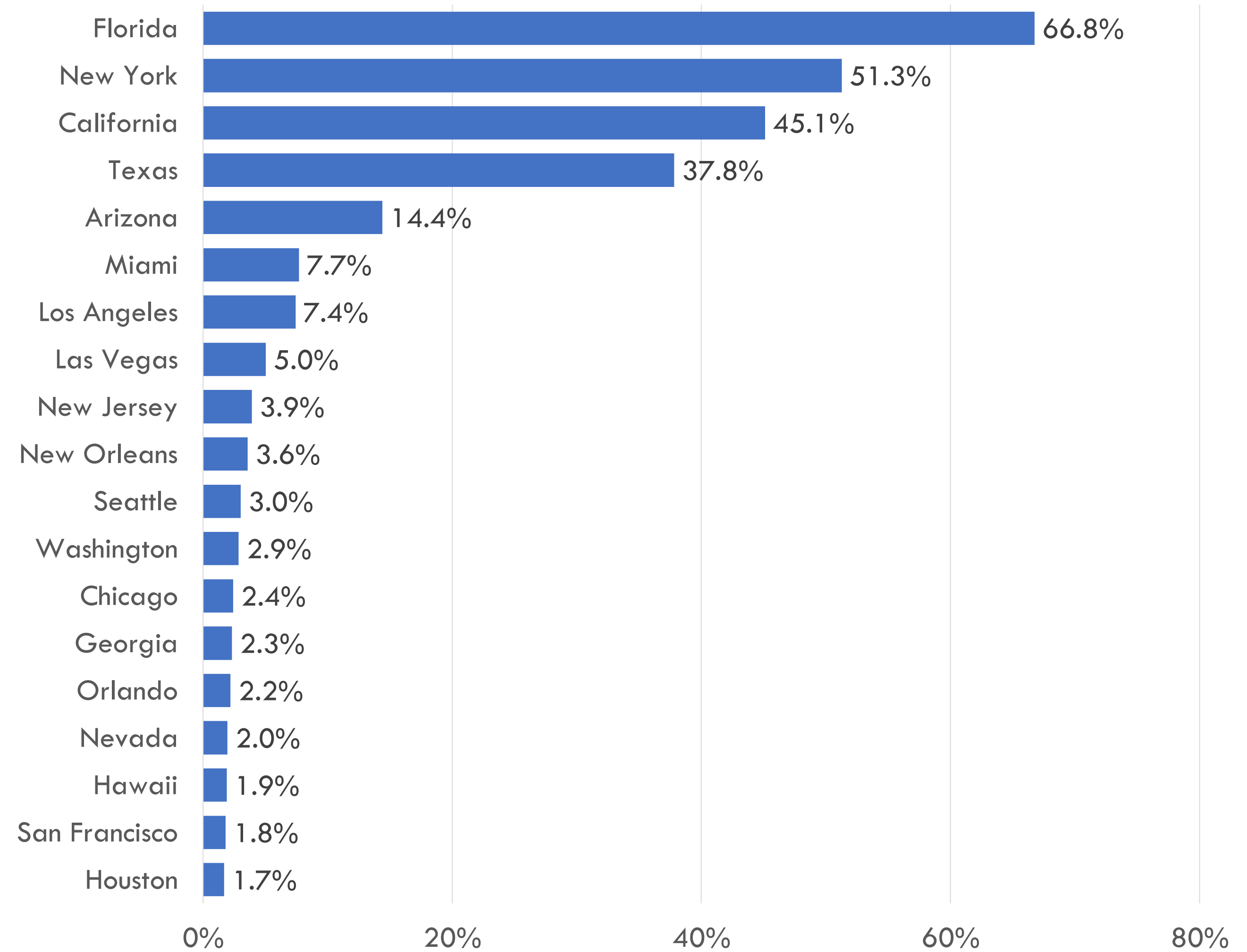
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



# Most Talked About Coronavirus Hotspots

**Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues? (OPEN-ENDED QUESTION)**

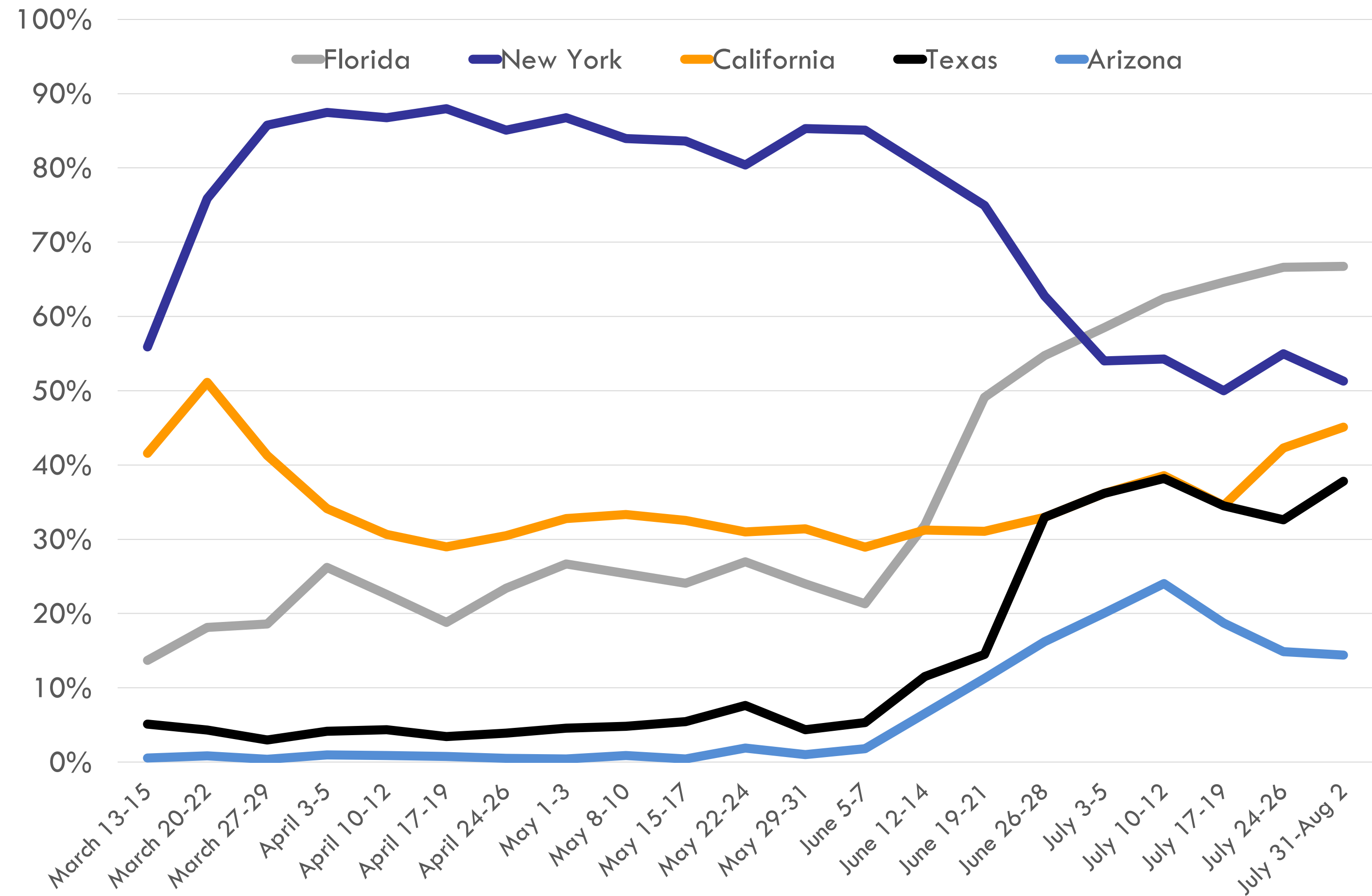
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



# Most Talked About Coronavirus Hotspots

**Question:** What are the **THREE (3) U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues? (OPEN-ENDED QUESTION)**

Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, and July 31-Aug 2, 2020)



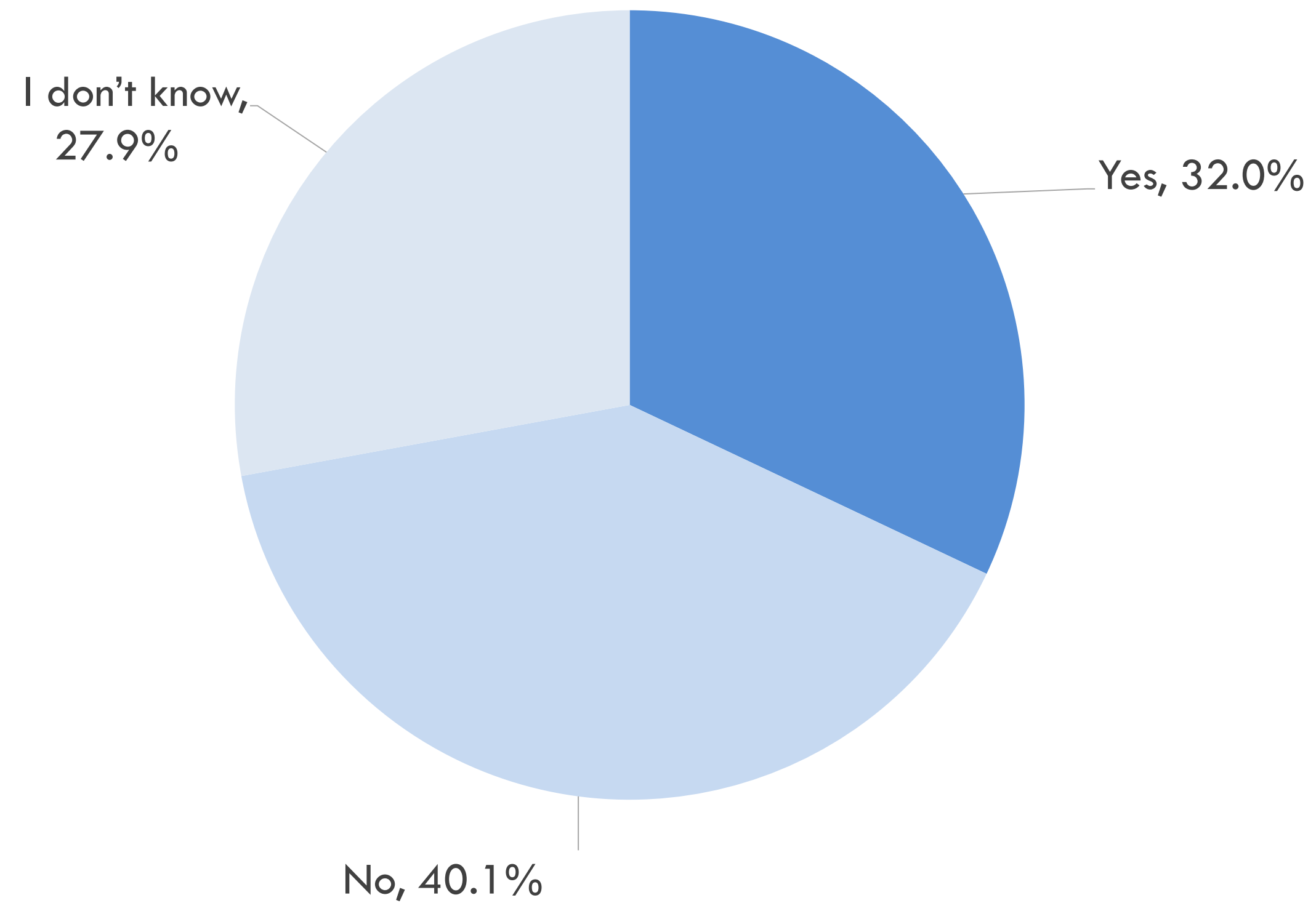


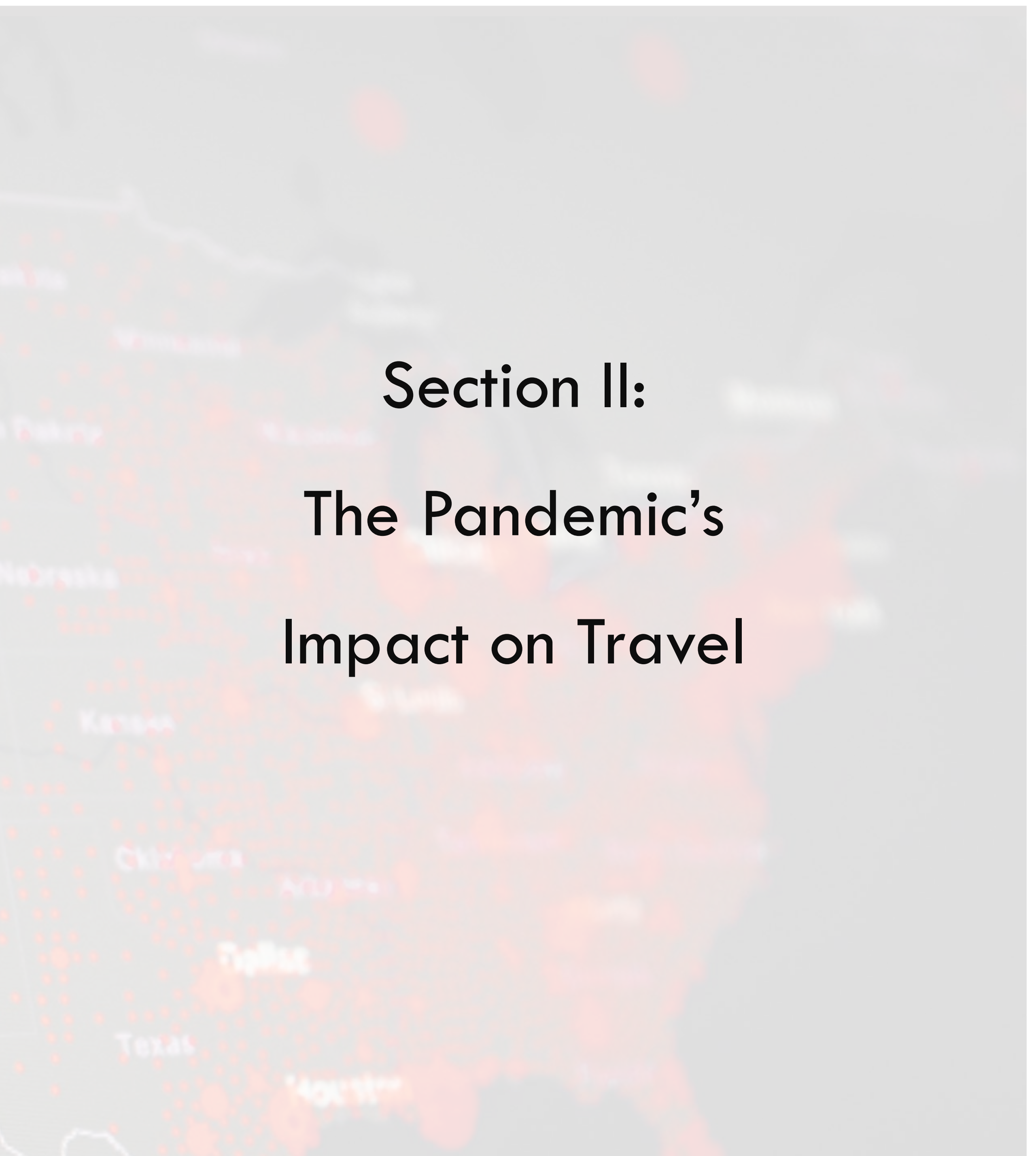
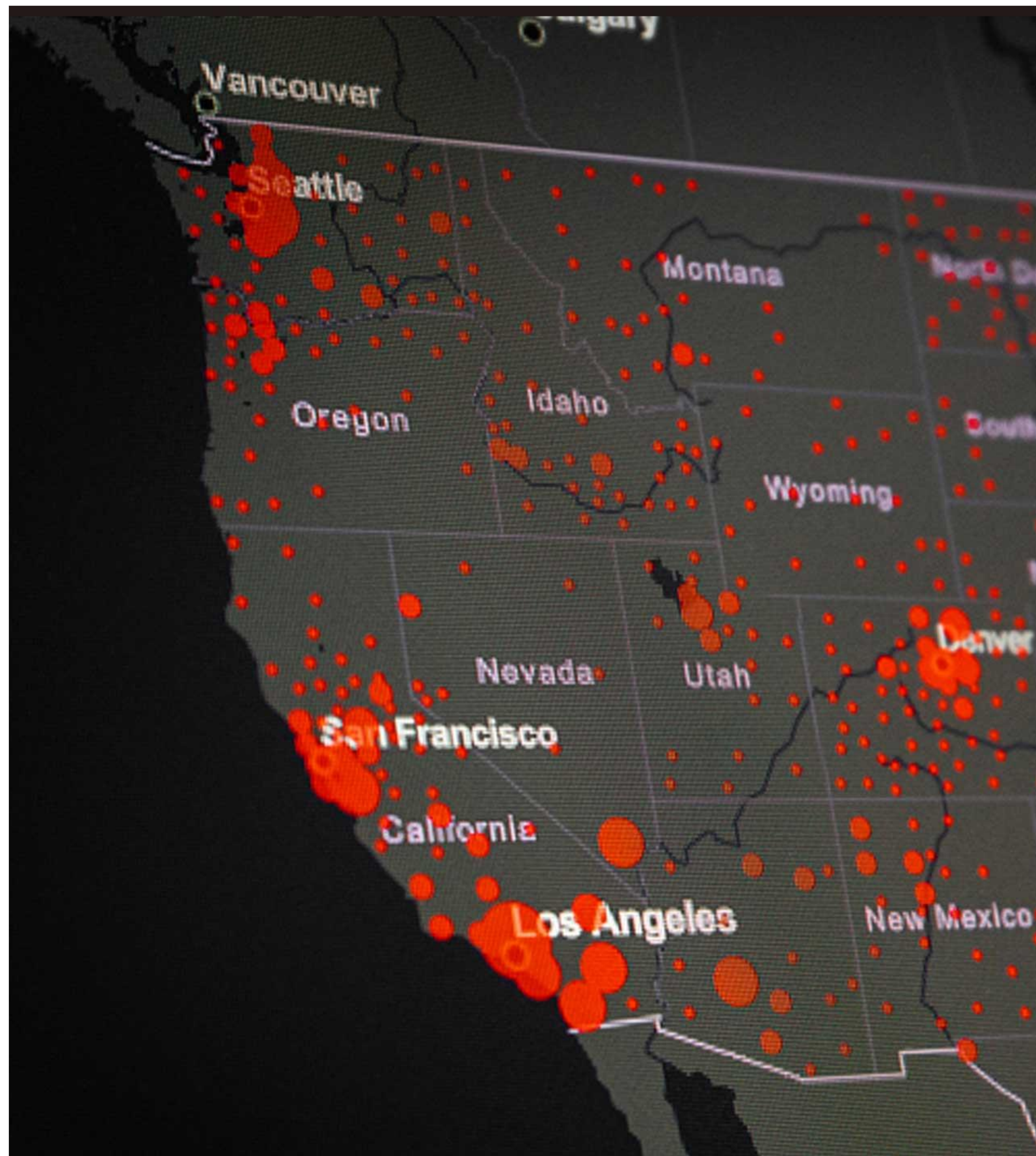
# Impact of Coronavirus Issues on Future Intent to Visit

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**Question:** When the coronavirus situation is over, will you be less likely to visit any of these destinations because of their current Coronavirus-related issues?

*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-August 2, 2020)*

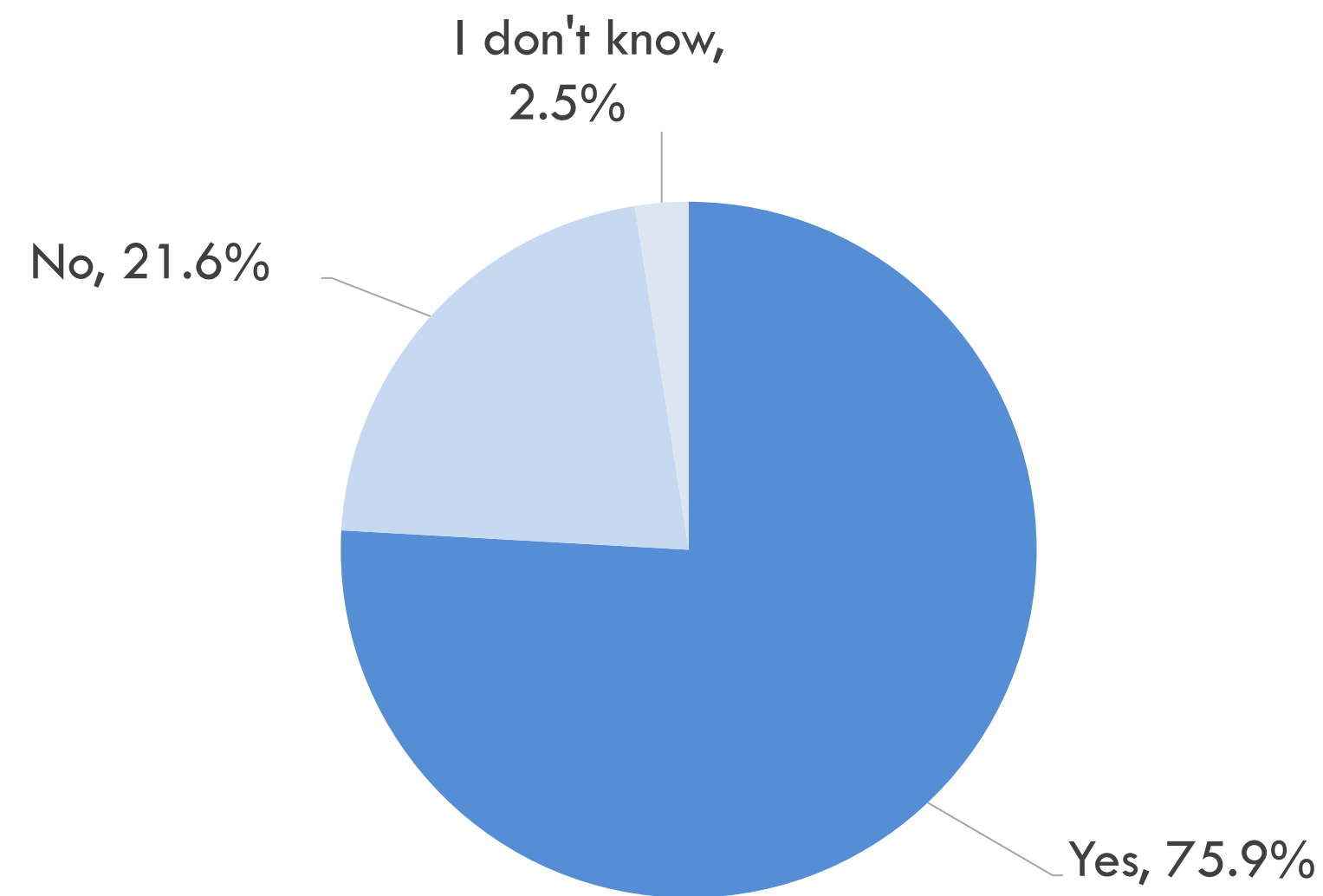




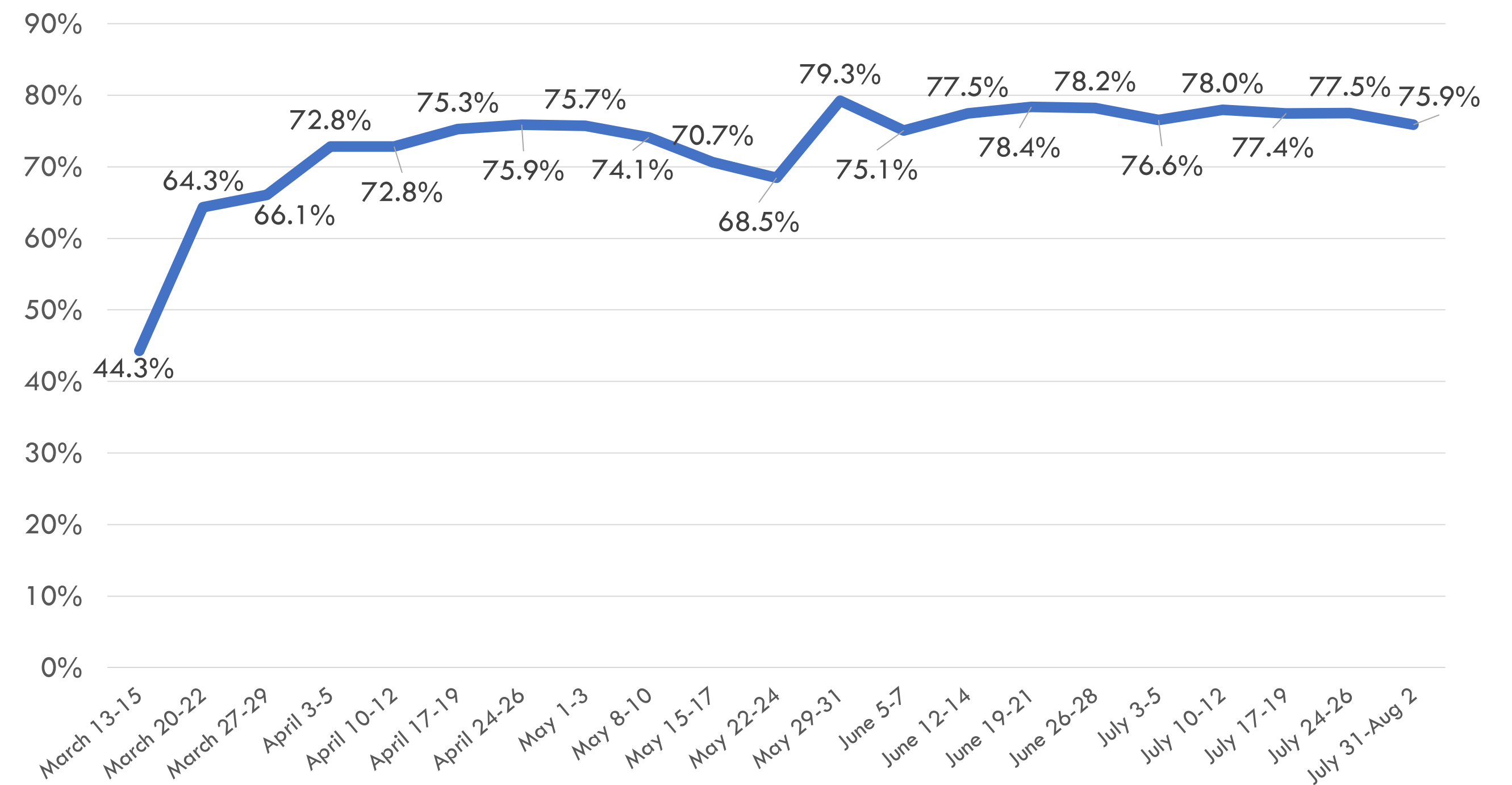
Section II:  
The Pandemic's  
Impact on Travel

# Impact of the Coronavirus on Travel

**Question:** Has the current coronavirus situation affected your travel in any way? (Please consider all your travel--leisure, business, group meeting, etc.)



## Historical data



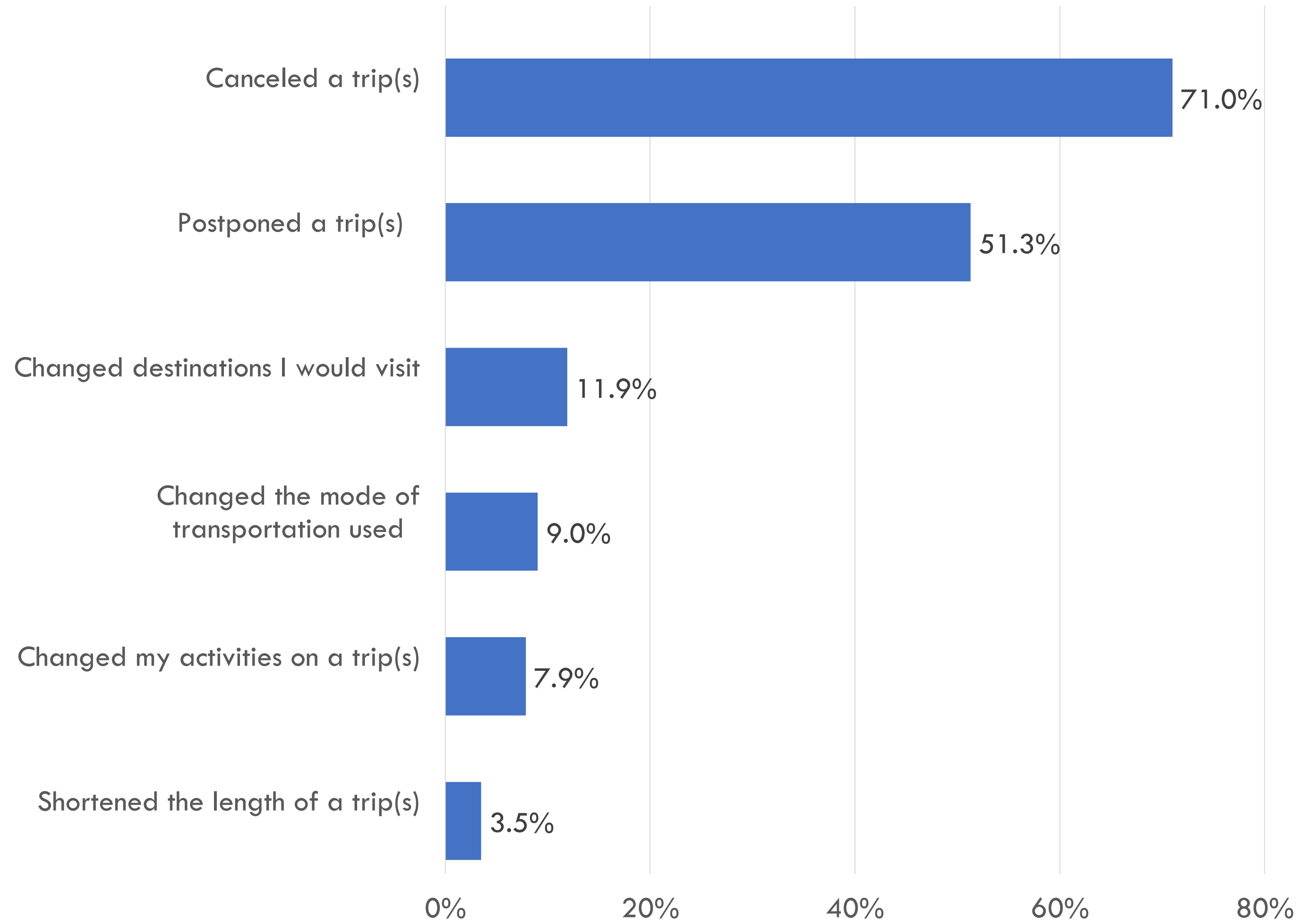
Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, and July 31-Aug 2, 2020)

# How the Coronavirus has Impacted Travel

**Question:** How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have\_\_\_\_\_.

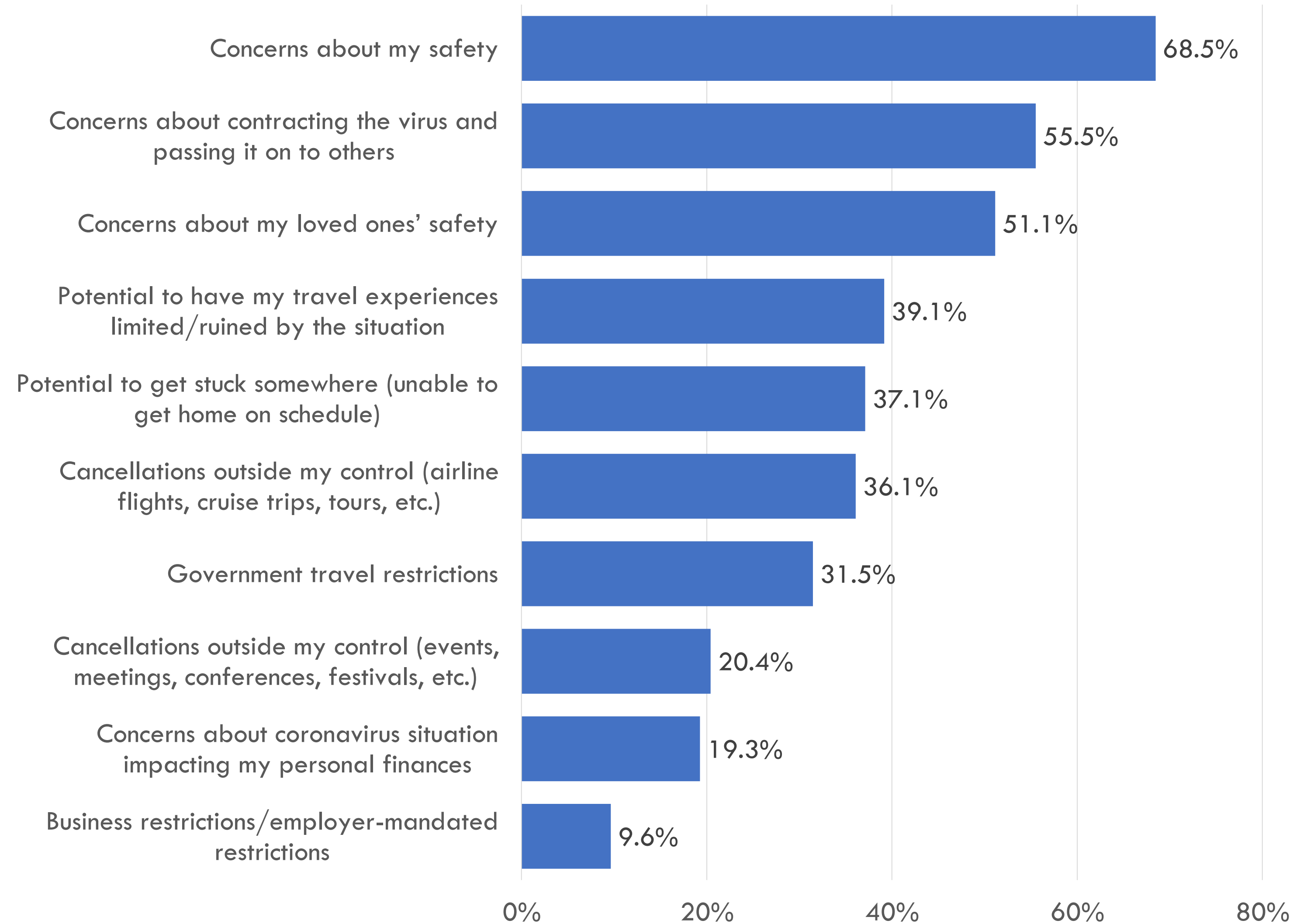
*(Base: All respondents with travel impacted by the pandemic, 553, 770, 795, 890, 937, 929, 903, 926, 903, 871, 843, 993, 923, 952, 957, 974, 1,050, 954, 941, 960 and 944 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and July 31-August 2, 2020)*



# Why the Coronavirus is Impacting Travel

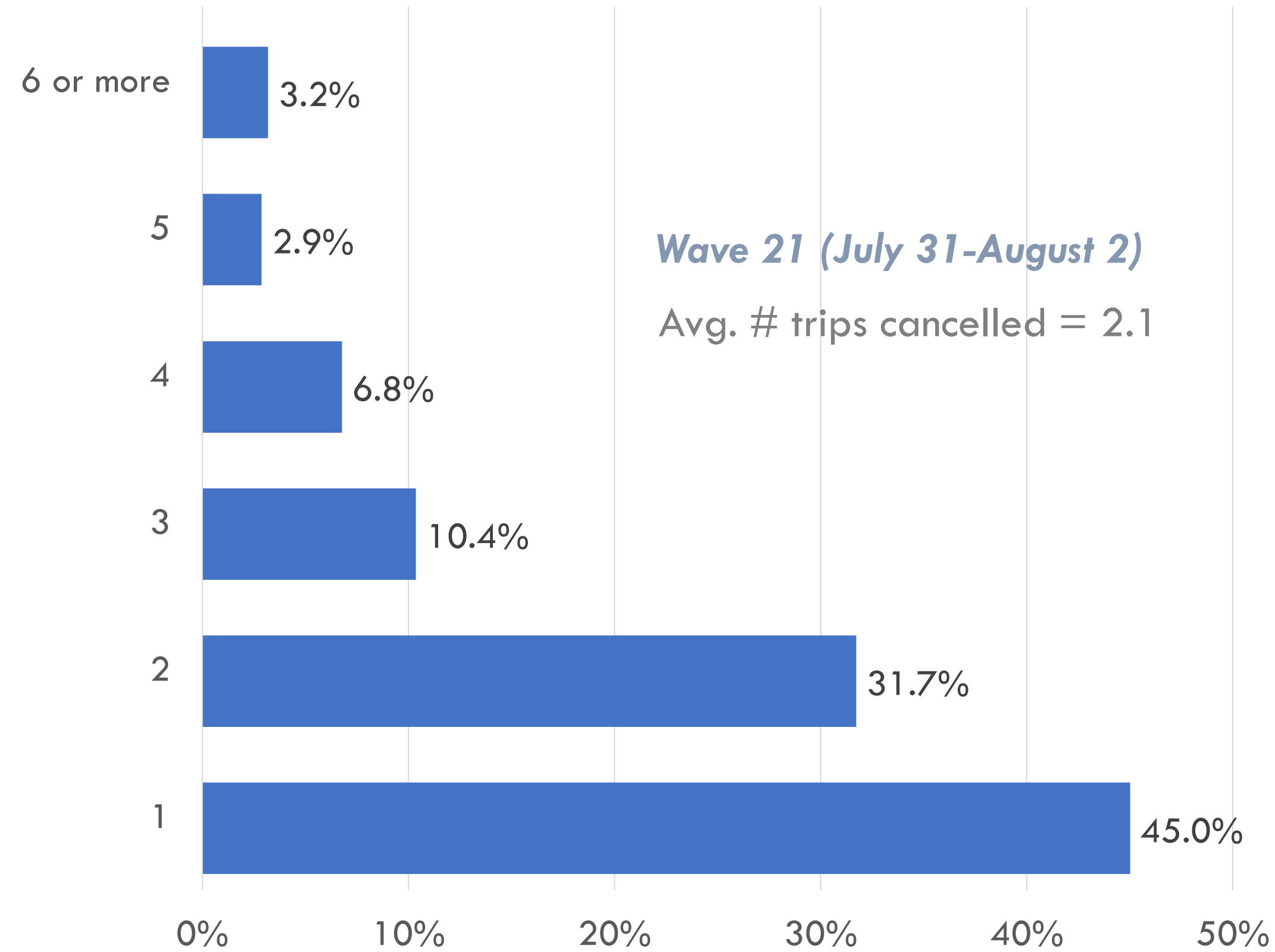
**Question: Which of the following are reasons the coronavirus situation has changed your travels?**

*(Base: Wave 20. Respondents whose travel was impacted by the coronavirus, 943 completed surveys. Data collected July 31-August 2, 2020)*

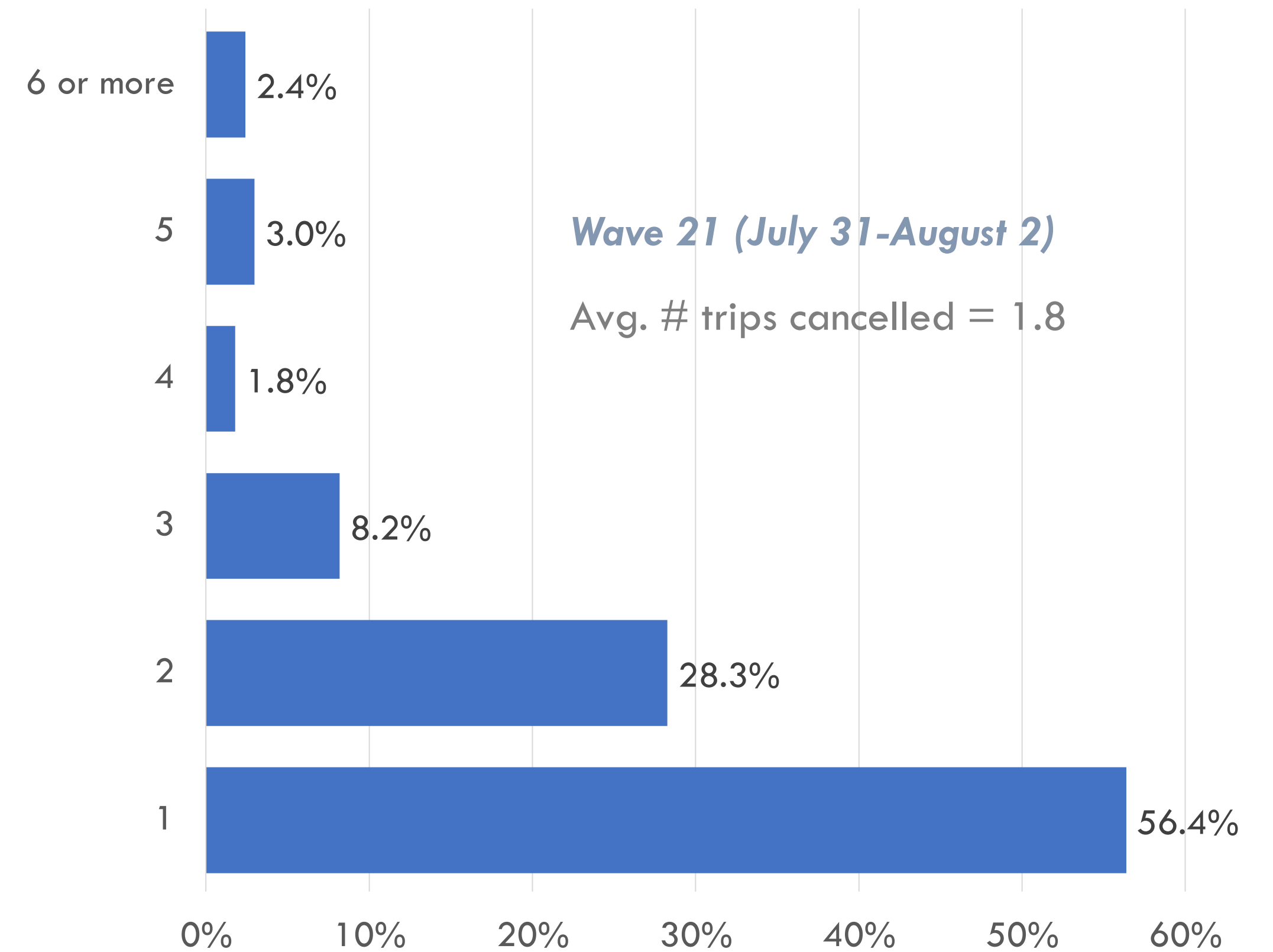


# Trips Cancelled/Postponed

**Question: How many trips did you cancel?**



**Question: How many trips did you postpone?**

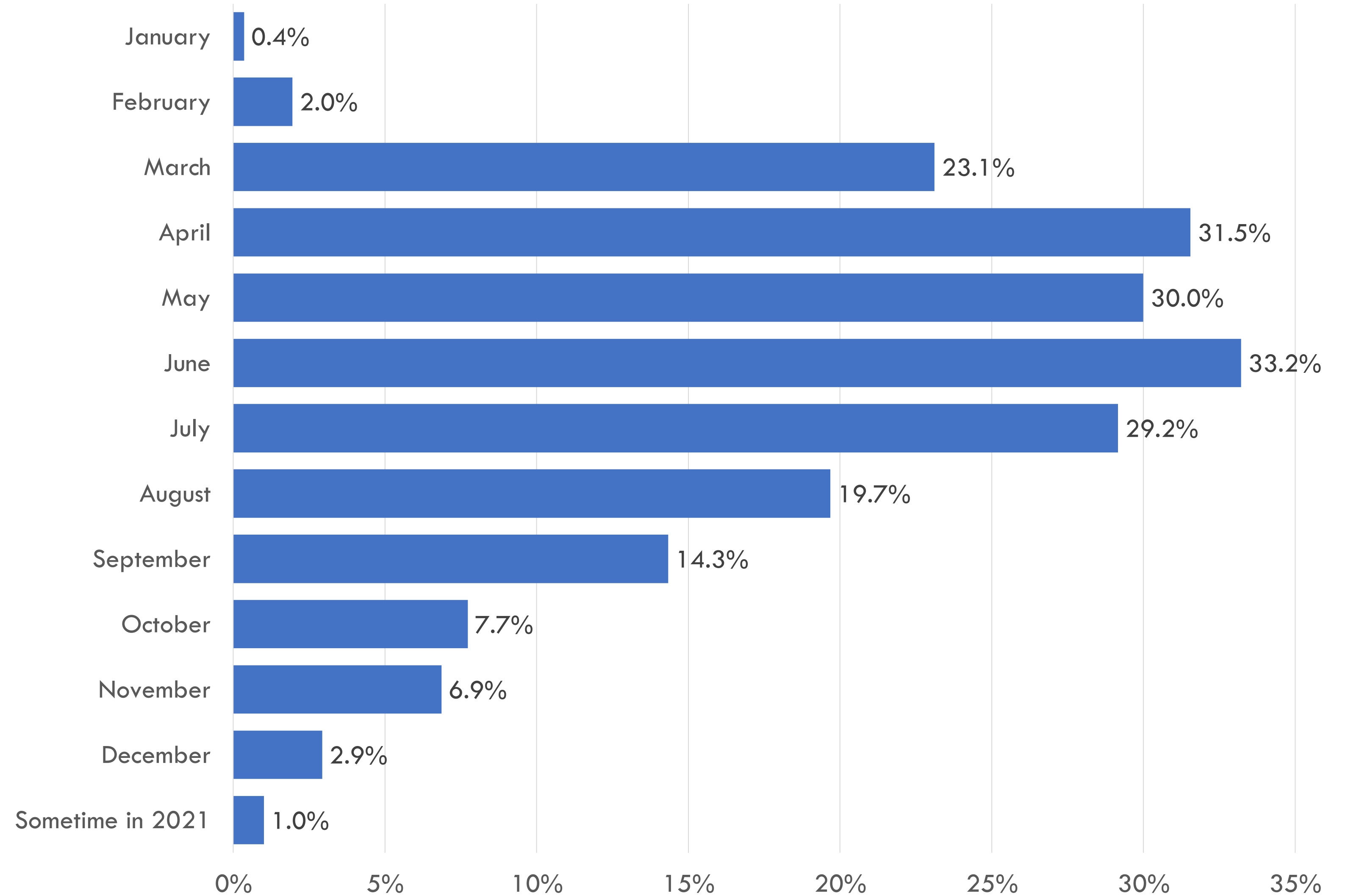


(Base: Wave 21 Respondents cancelling/postponing a trip, 664/502 completed surveys. Data collected July 31-August 2, 2020)

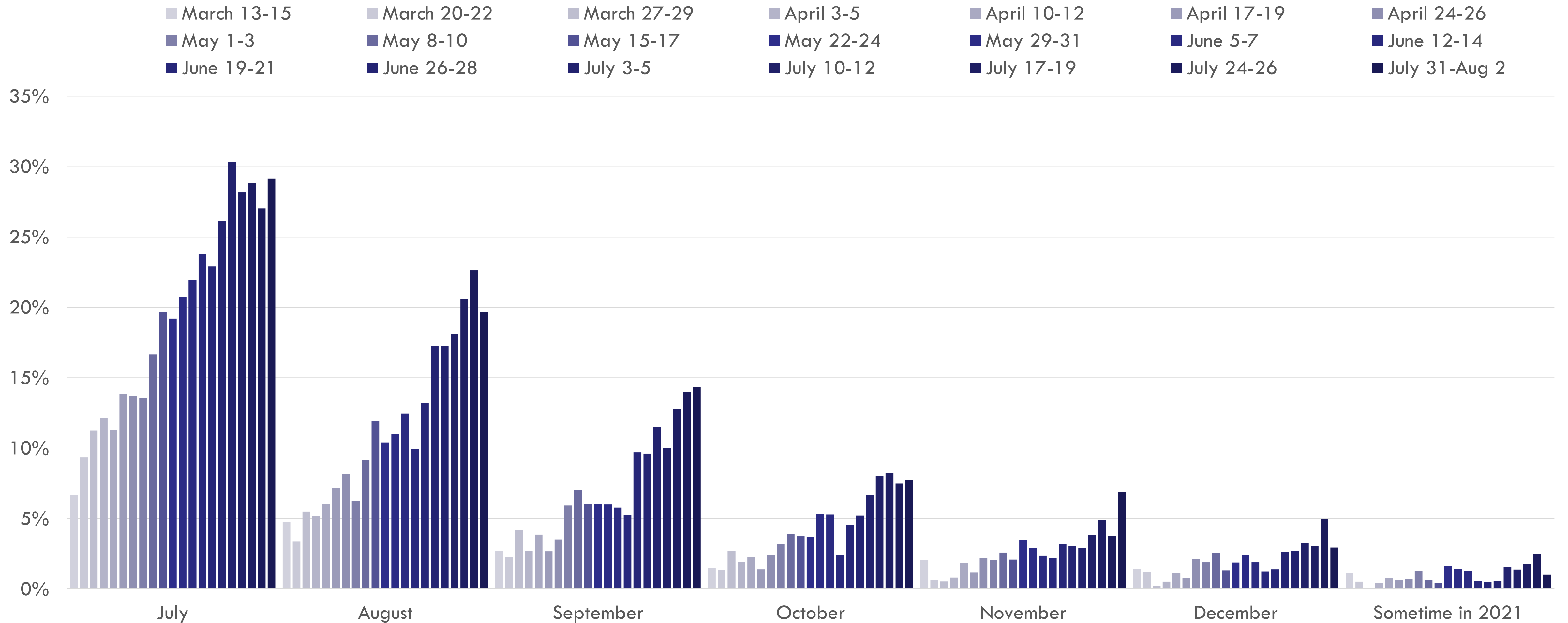
# Month of Trip Cancellation

**Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)**

*(Base: Wave 21 data. Respondents cancelling a trip, 664 completed surveys. Data collected July 31-August 2, 2020)*



# Month of Trip Cancellation

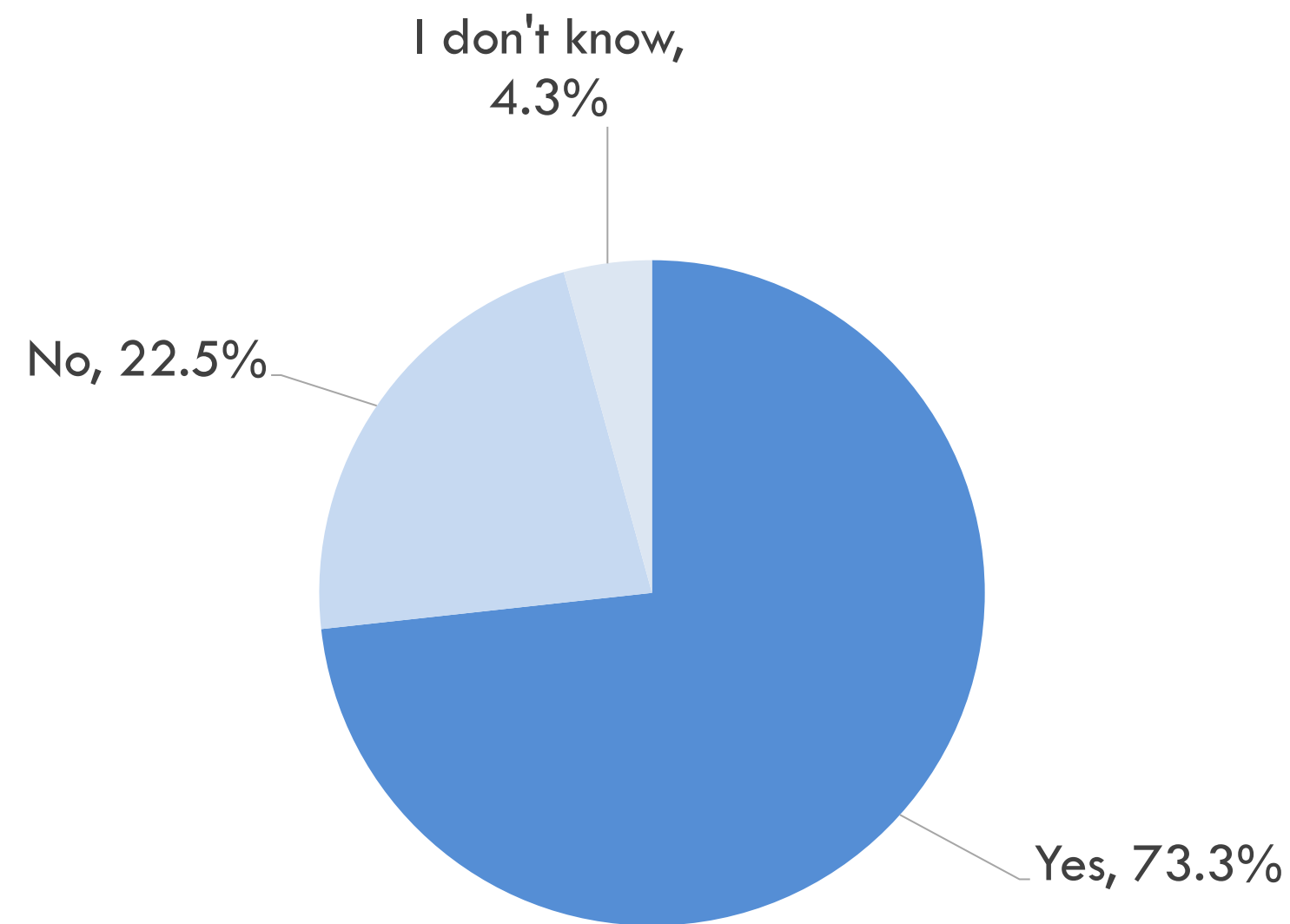


(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728, 675, 672 and 664 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and July 31-August 2, 2020)



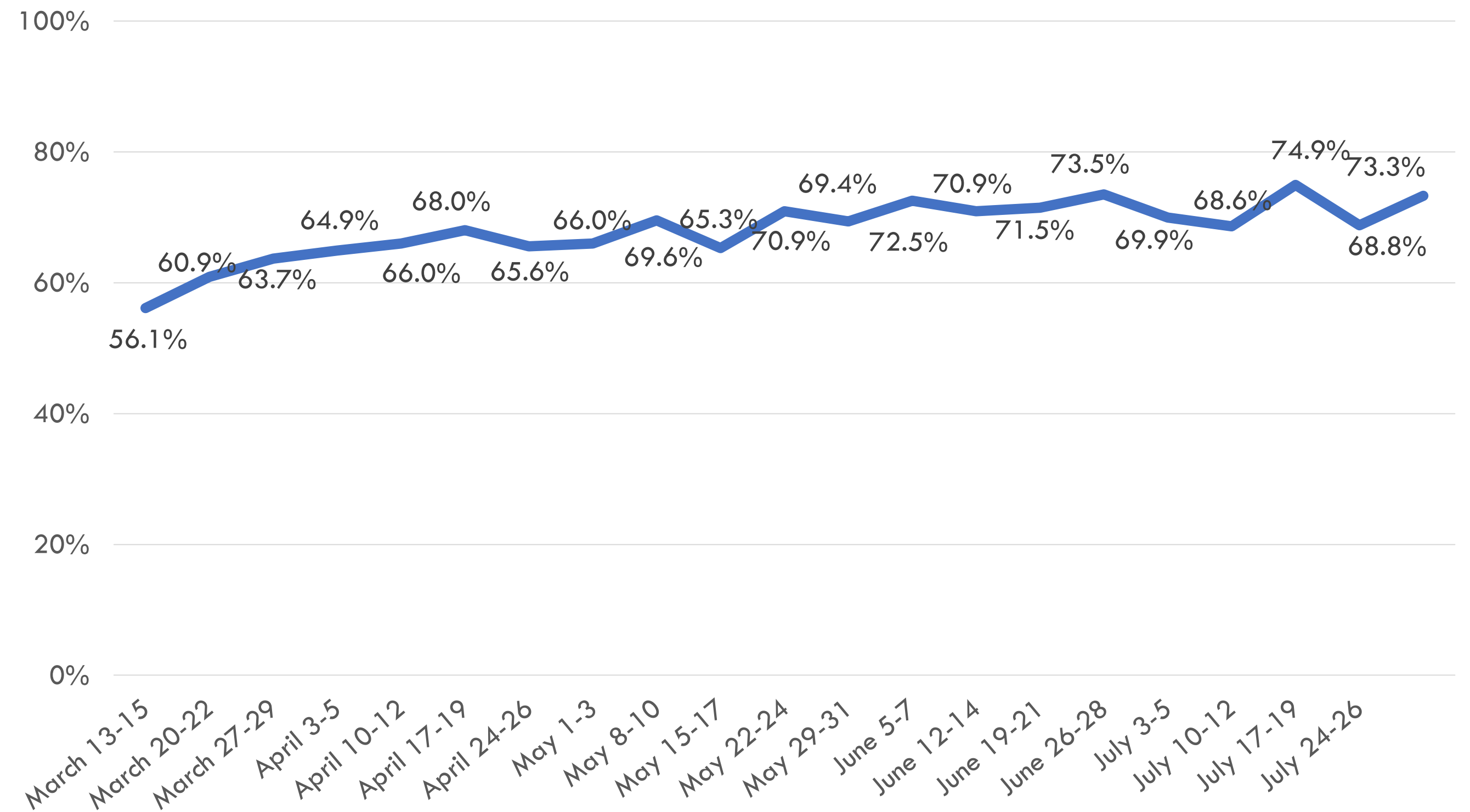
# Did Traveler Get Full Refunds?

**Question:** Did you get full refunds for any reservations you canceled? (Select one)



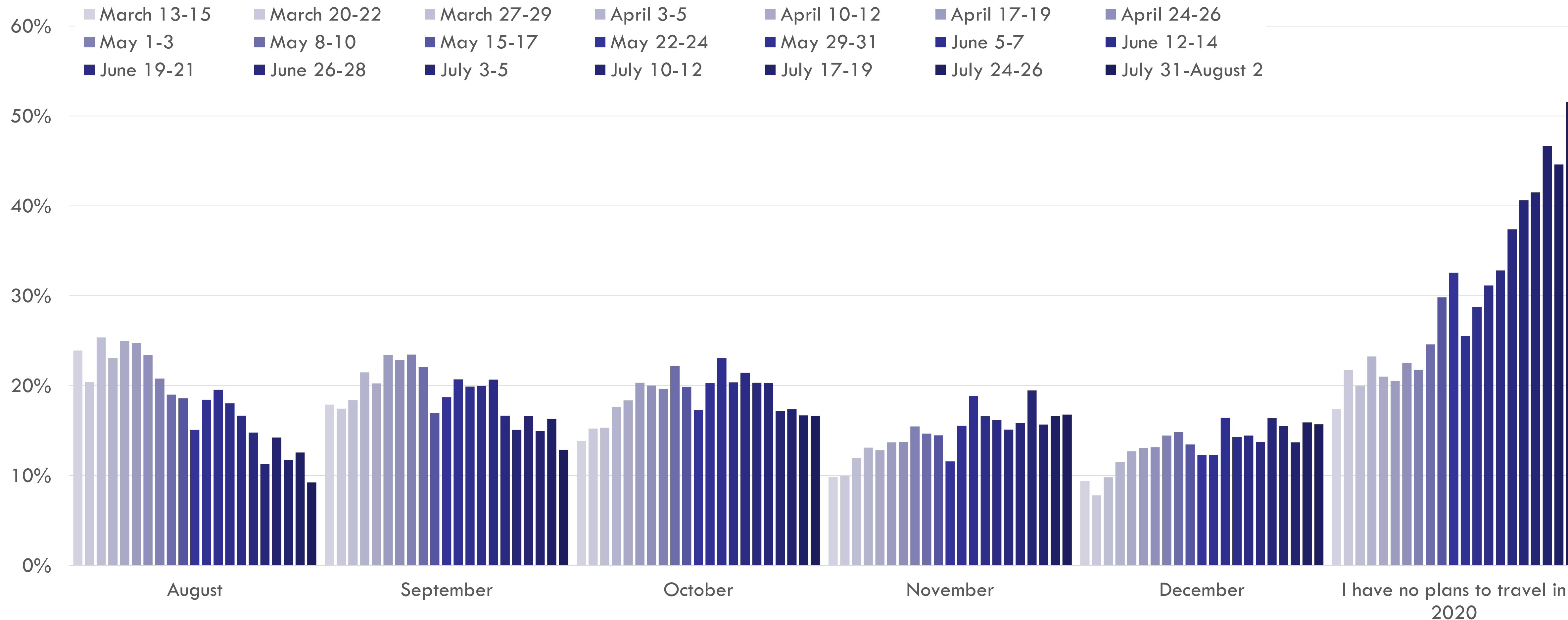
(Base: Wave 21 data. Respondents cancelling a trip, 664 completed surveys. Data collected July 31-August 2, 2020)

## Historical data



# Upcoming Travel Plans

**Question:** Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

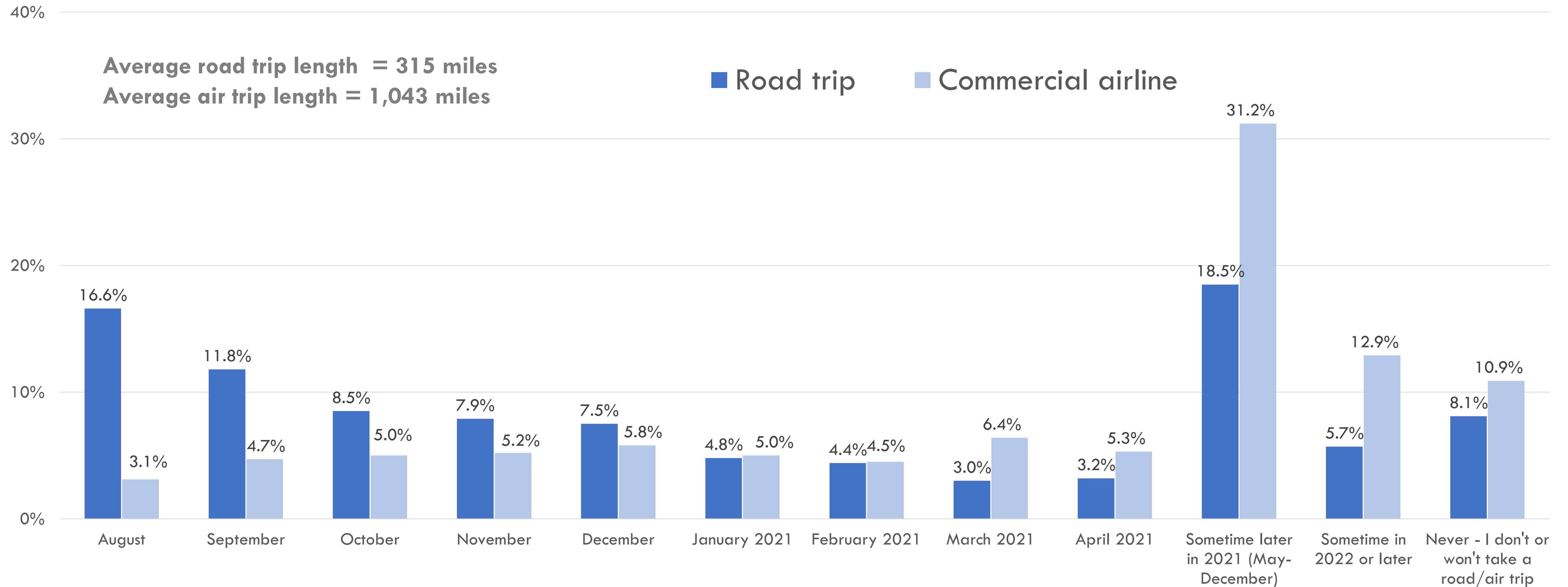


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

# Road & Air Trips Expected

**Question:** In what month do you expect you will take your **NEXT ROAD TRIP** (Traveling in a personal automobile)?

**Question:** In what month do you expect you will take your **NEXT TRIP** on a commercial airline?





## Section III:

### Travelers and Masks

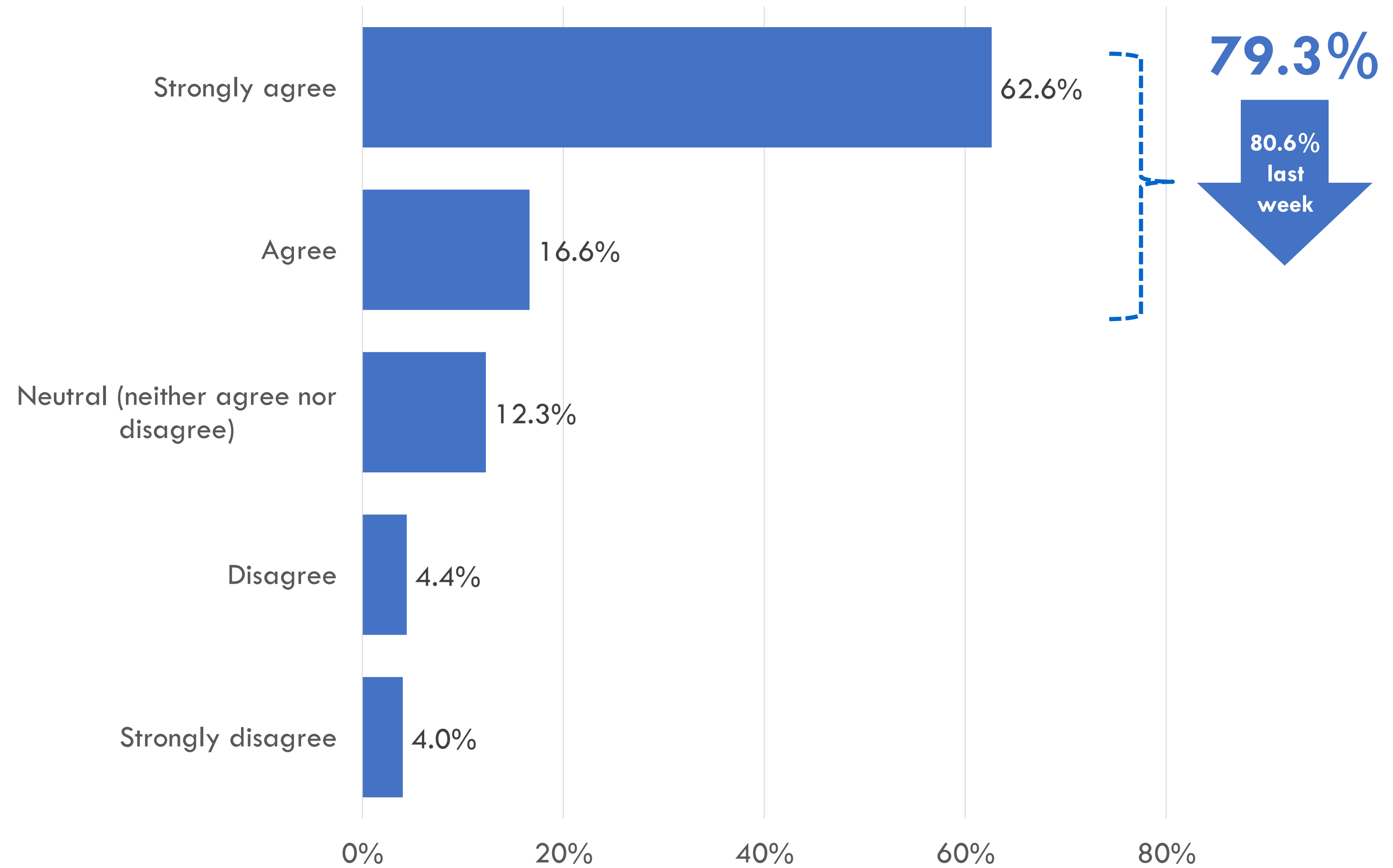


# Should People Wear Face Masks in Public

**Question:** In this environment, people should wear face masks when they are in public.

**(Agreement scale)**

*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*

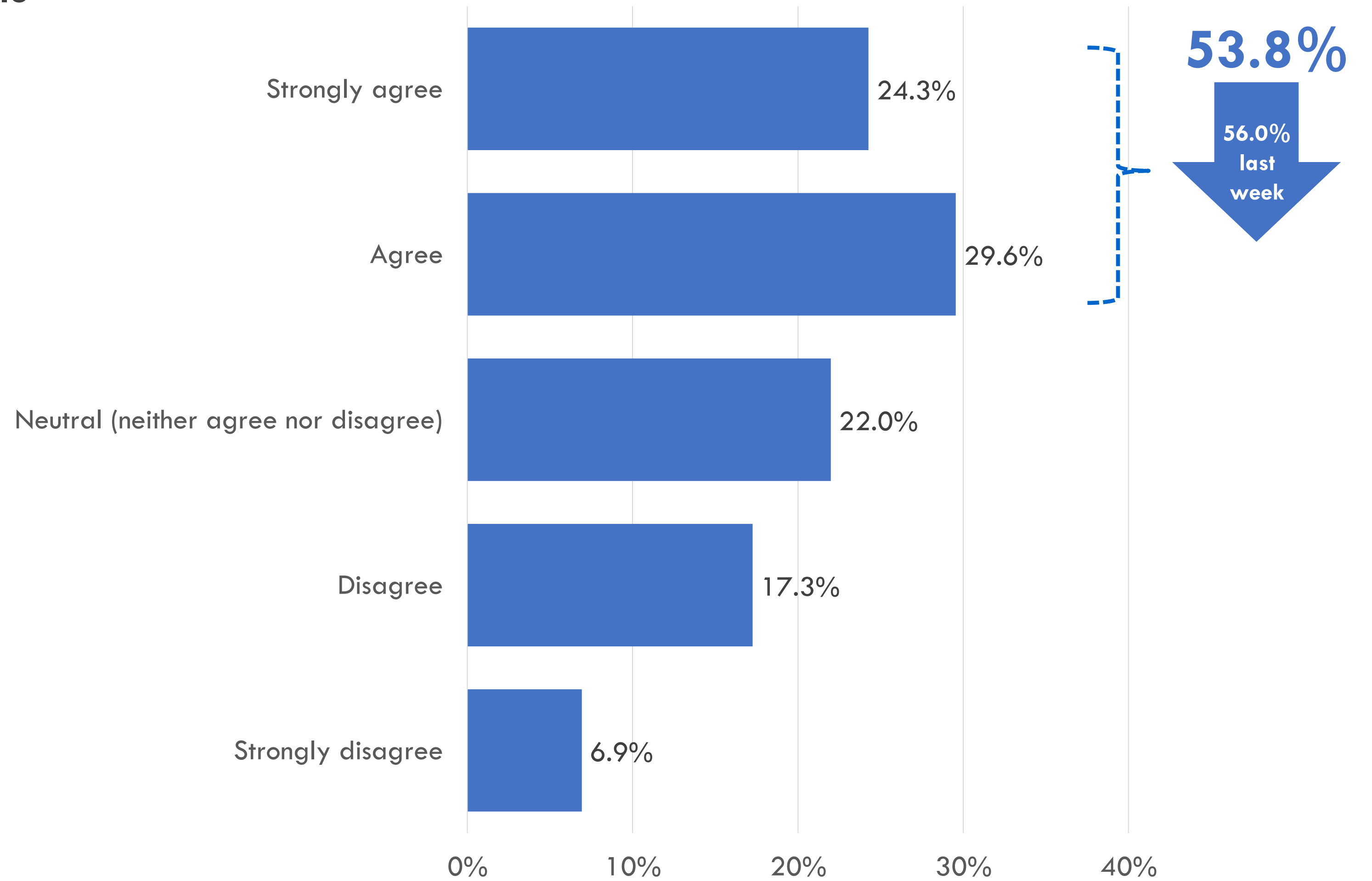


# Wearing Masks in the Community

**Question:** In my community, too many people are not wearing face masks in public.

**(Agreement scale)**

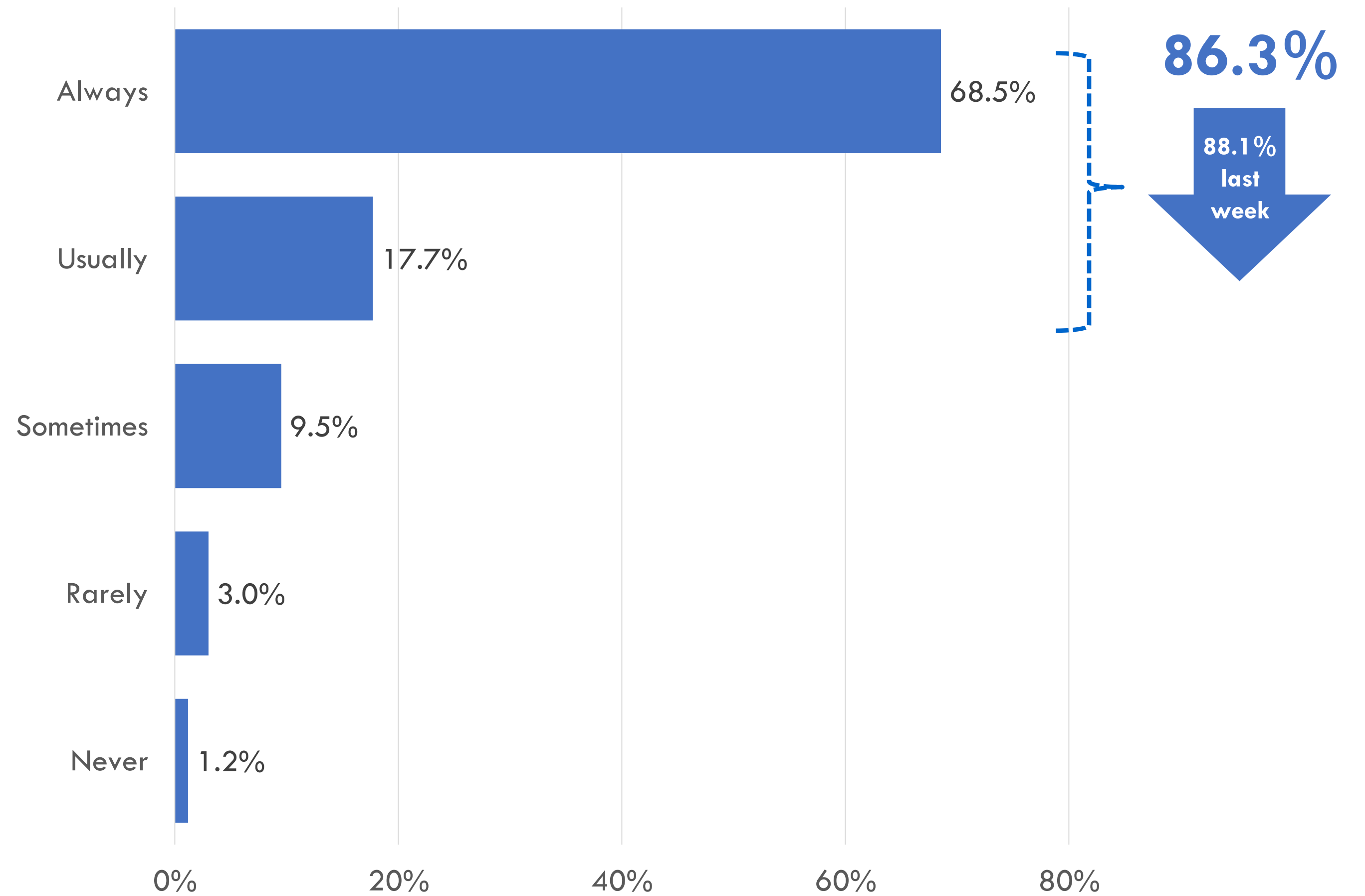
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



# Frequency of Mask Usage

**Question:** How often do you personally wear a mask when going out in public?

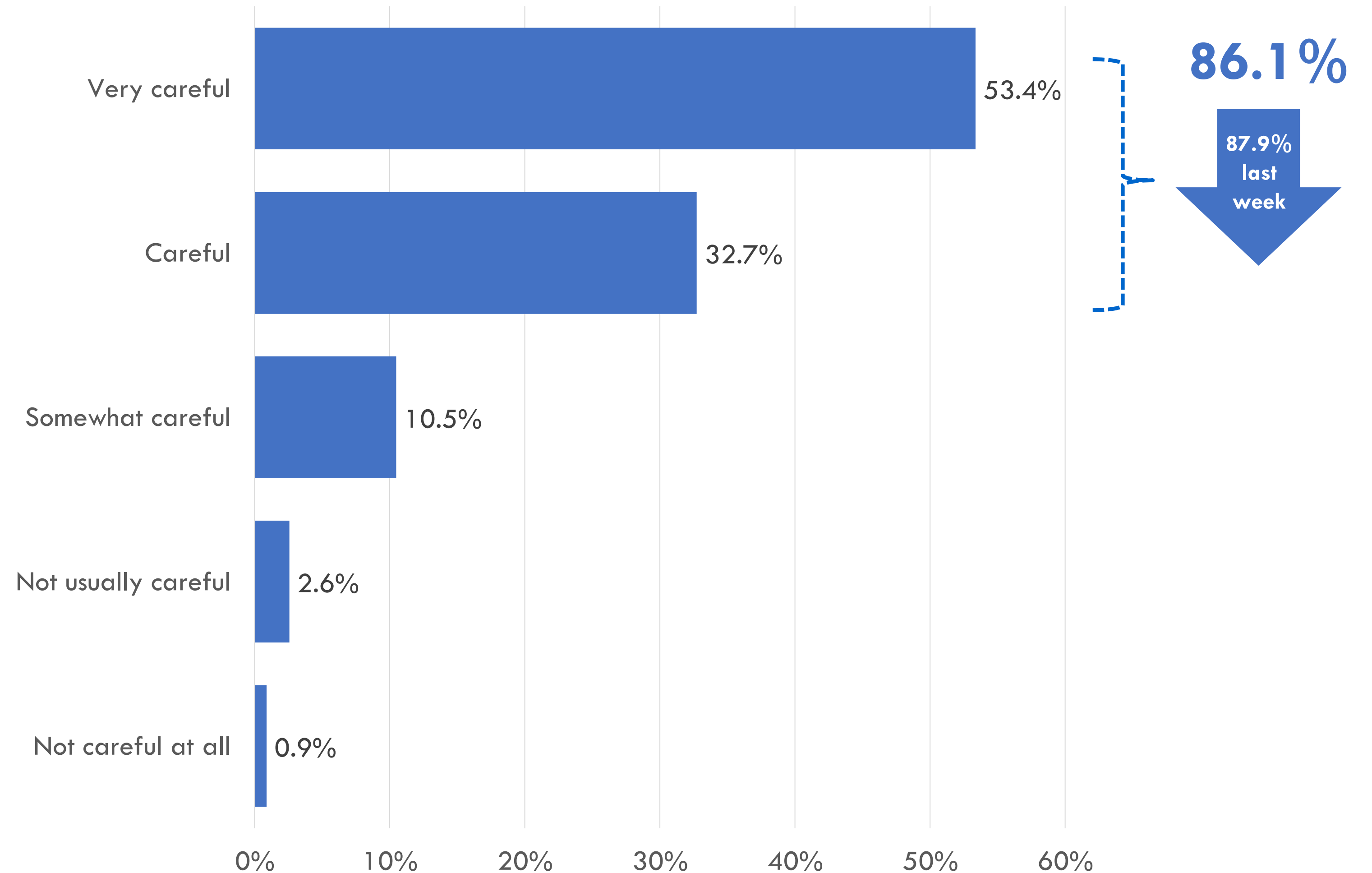
(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



# How Careful are They About Social Distancing

**Question:** When you are in public, how careful are you generally to keep an appropriate distance between yourself and others? (Select one)

(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)

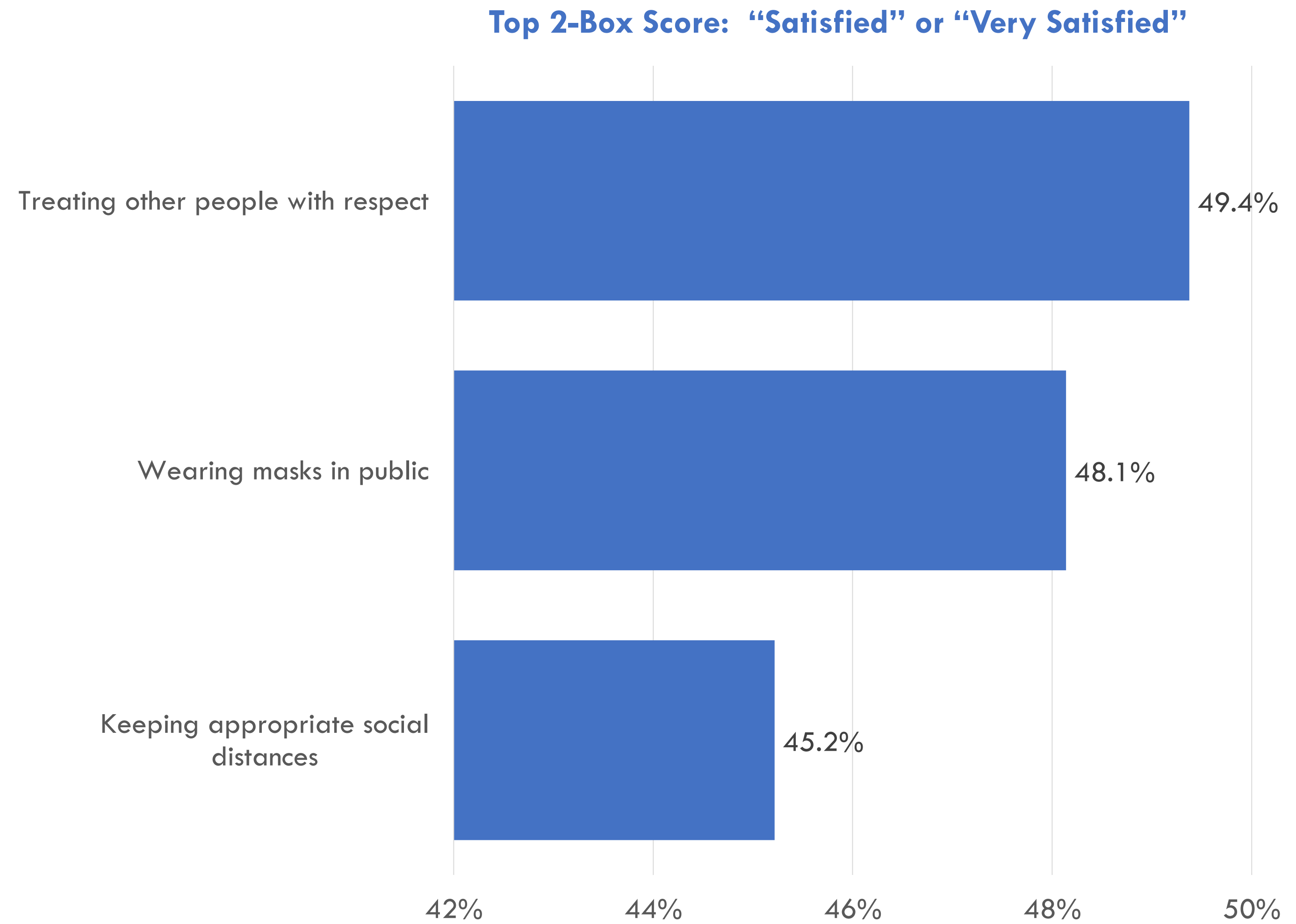




# Satisfaction with Pandemic Protocols

**Question:** How satisfied are you with the way people in your community are doing each of the following?

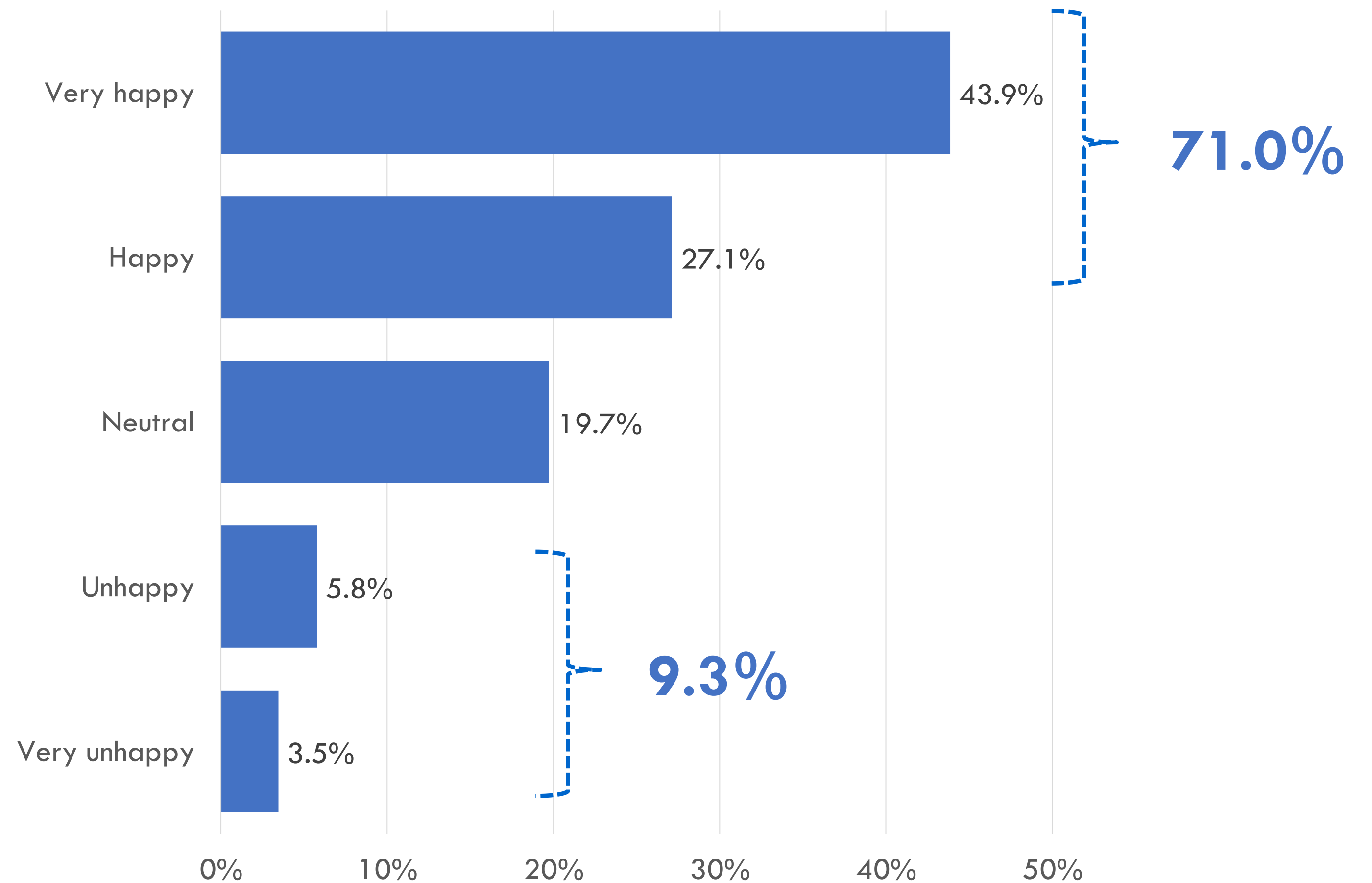
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*



# Feelings About Destinations Requiring Masks

**Question:** Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public?

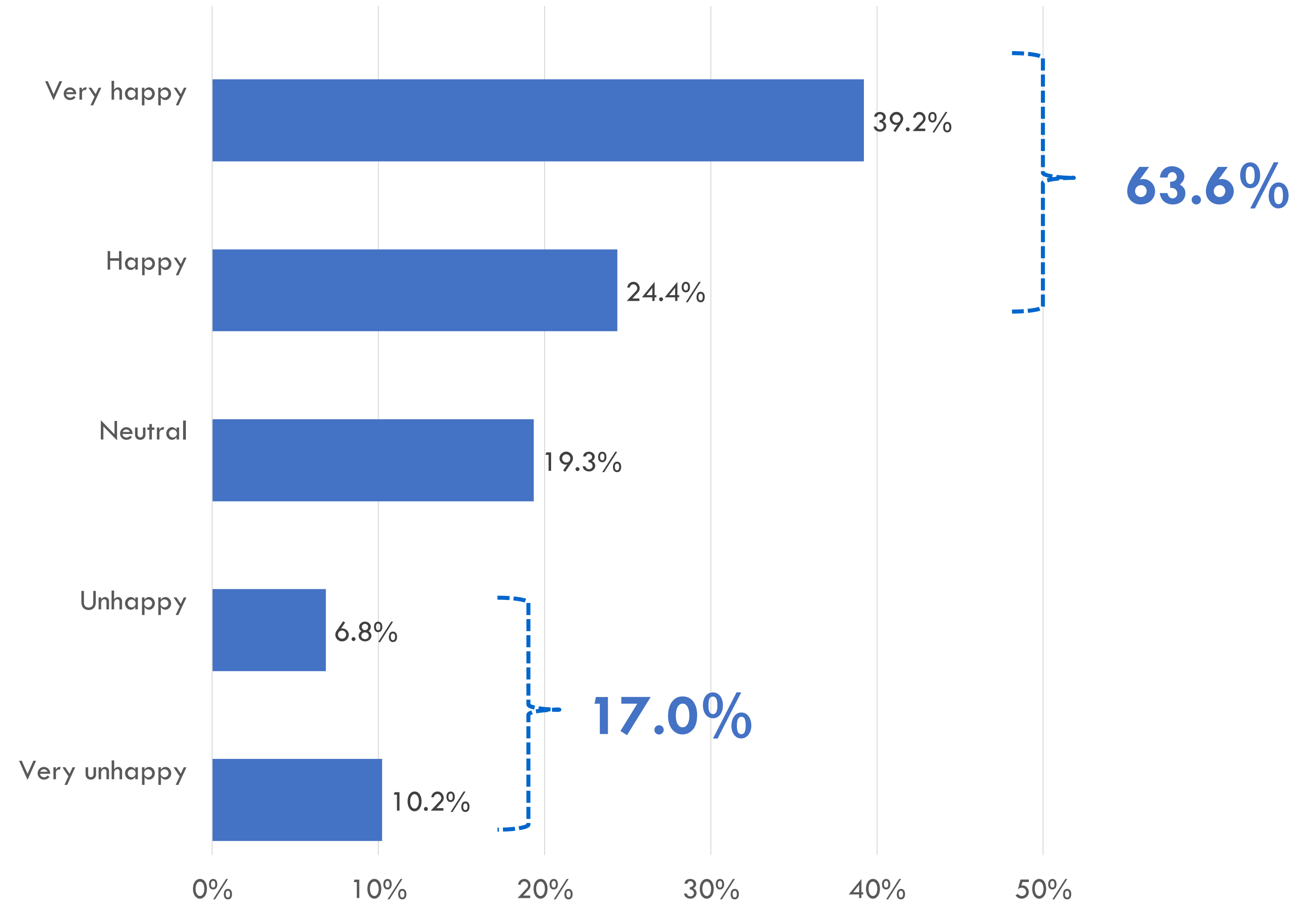
*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*

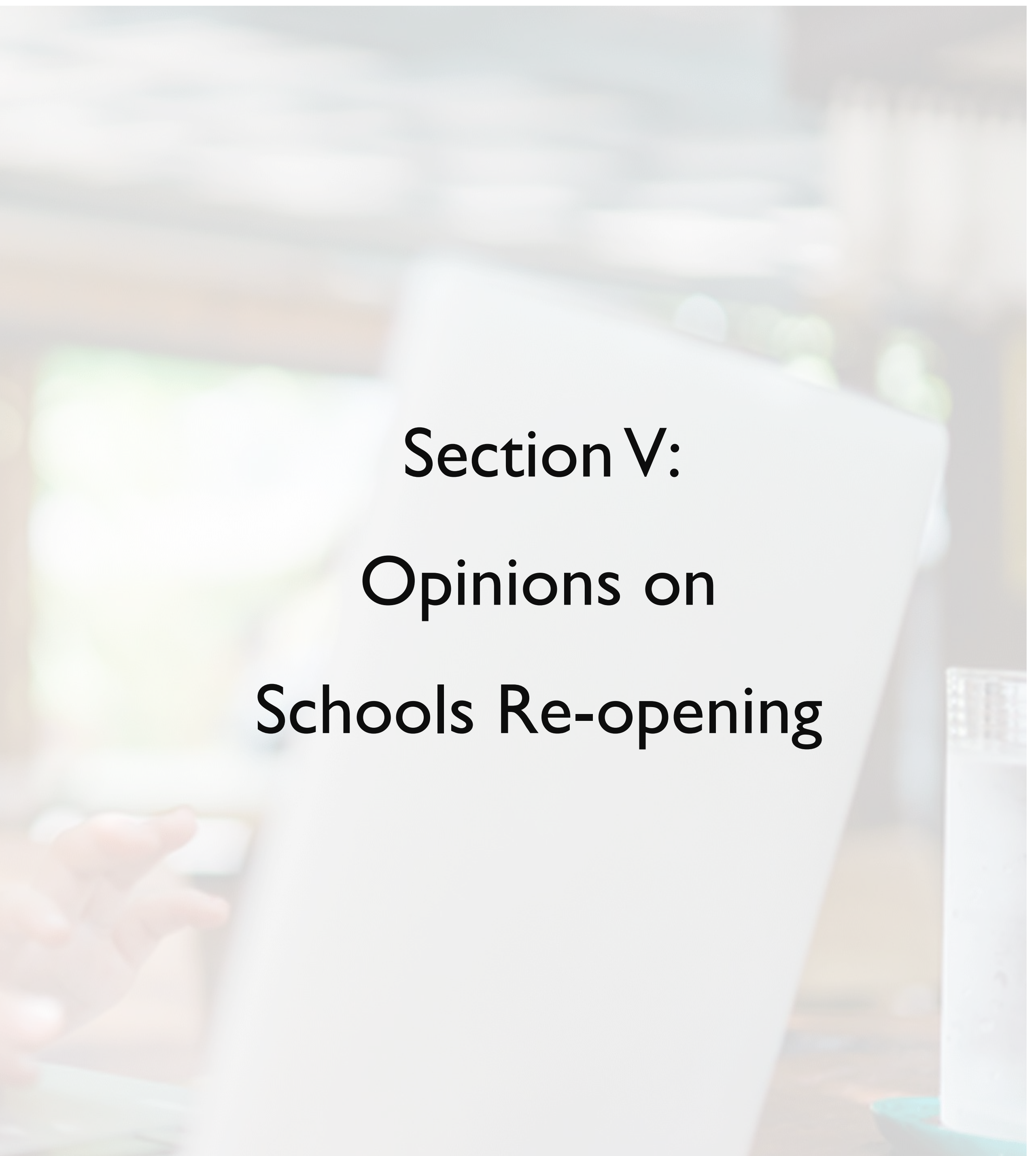


# Feelings About Fines for Non-Compliance with Mask Regulations

**Question:** Which best describes how you would feel if a destination you wanted to visit was giving tickets with fines to people who do not wear face masks in public?

*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)*





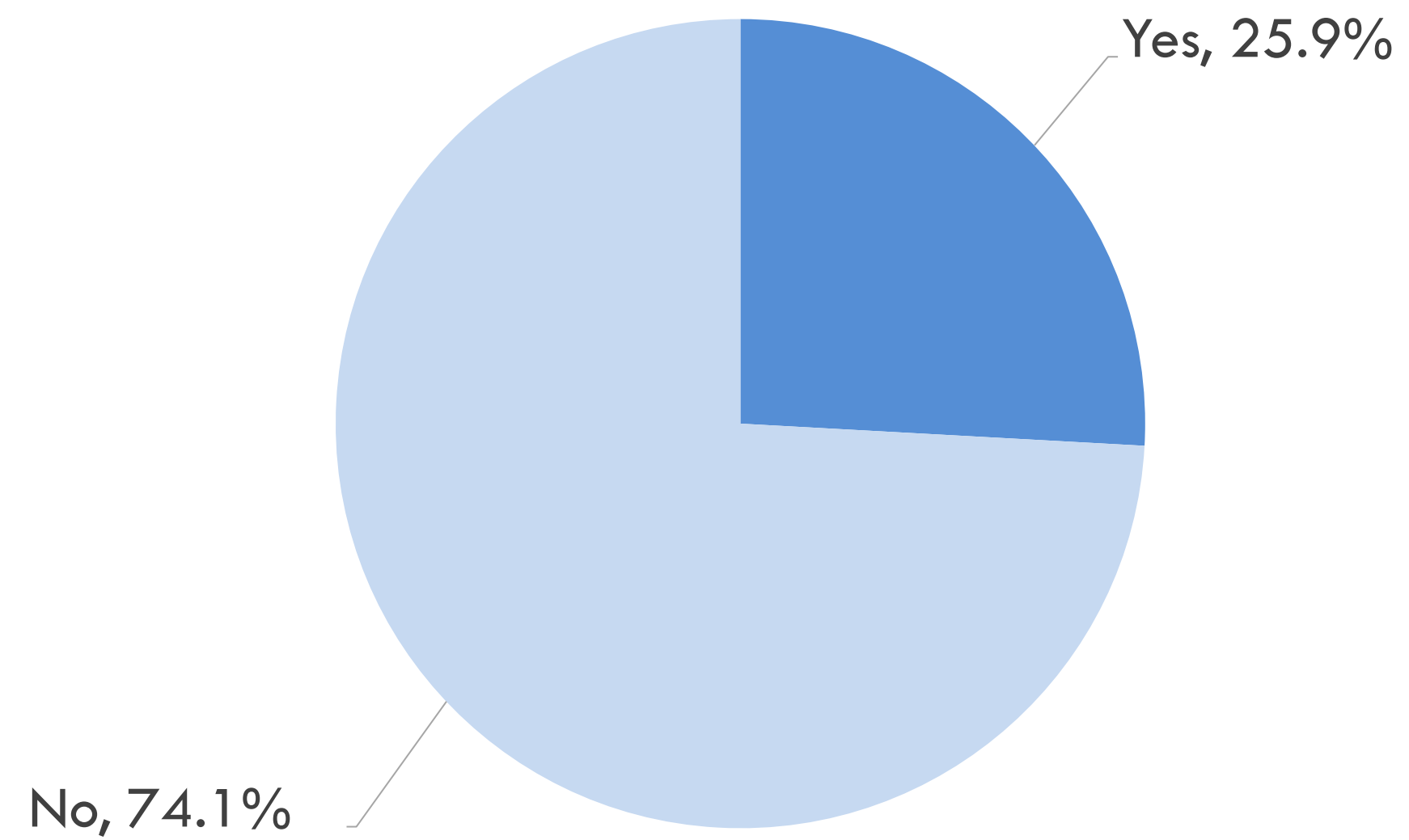
**Section V:  
Opinions on  
Schools Re-opening**

# Parental Status

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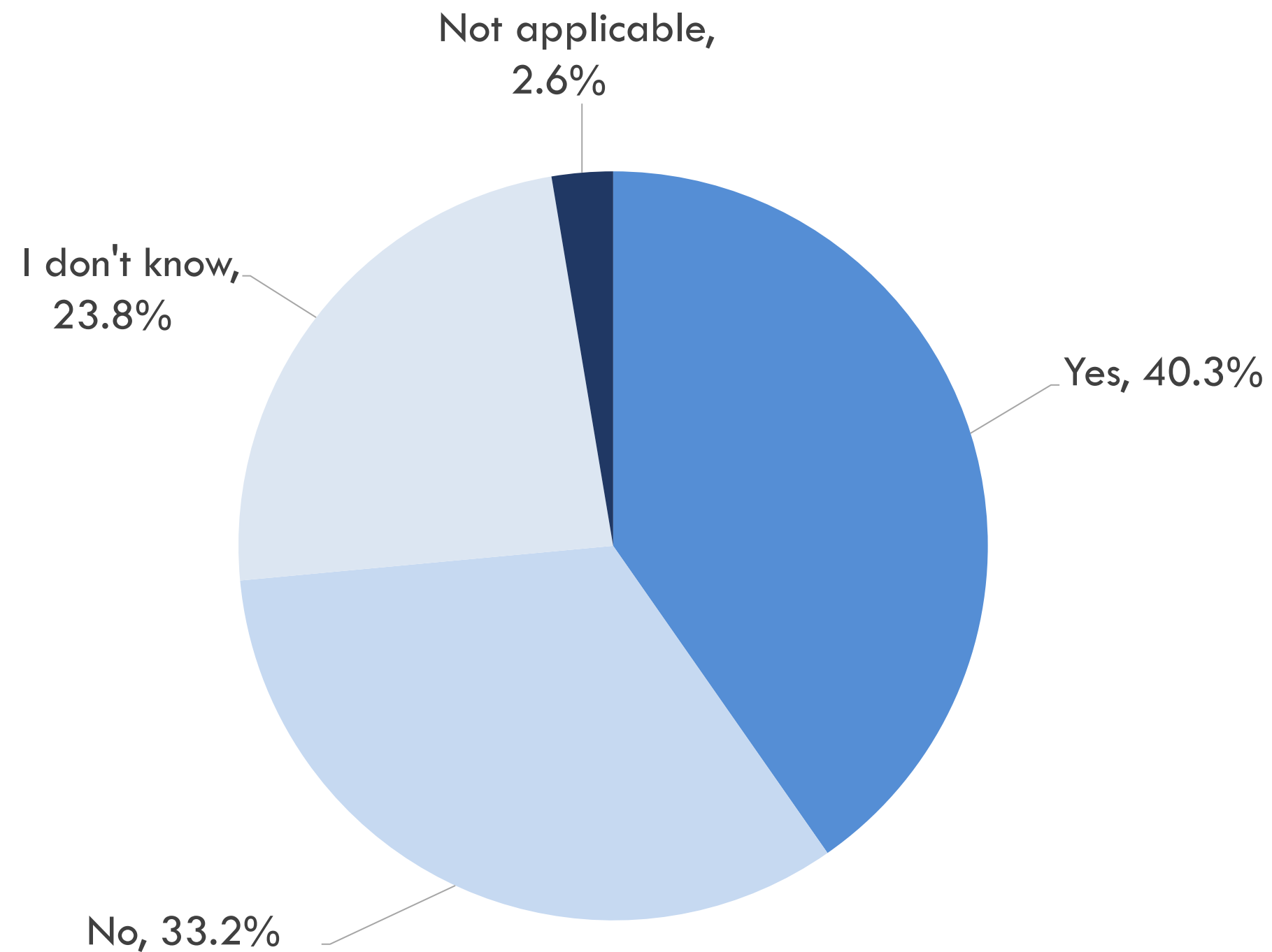
**Question:** Are you a parent to school-aged children who travel with you at least once a year?

*(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-August 2, 2020)*

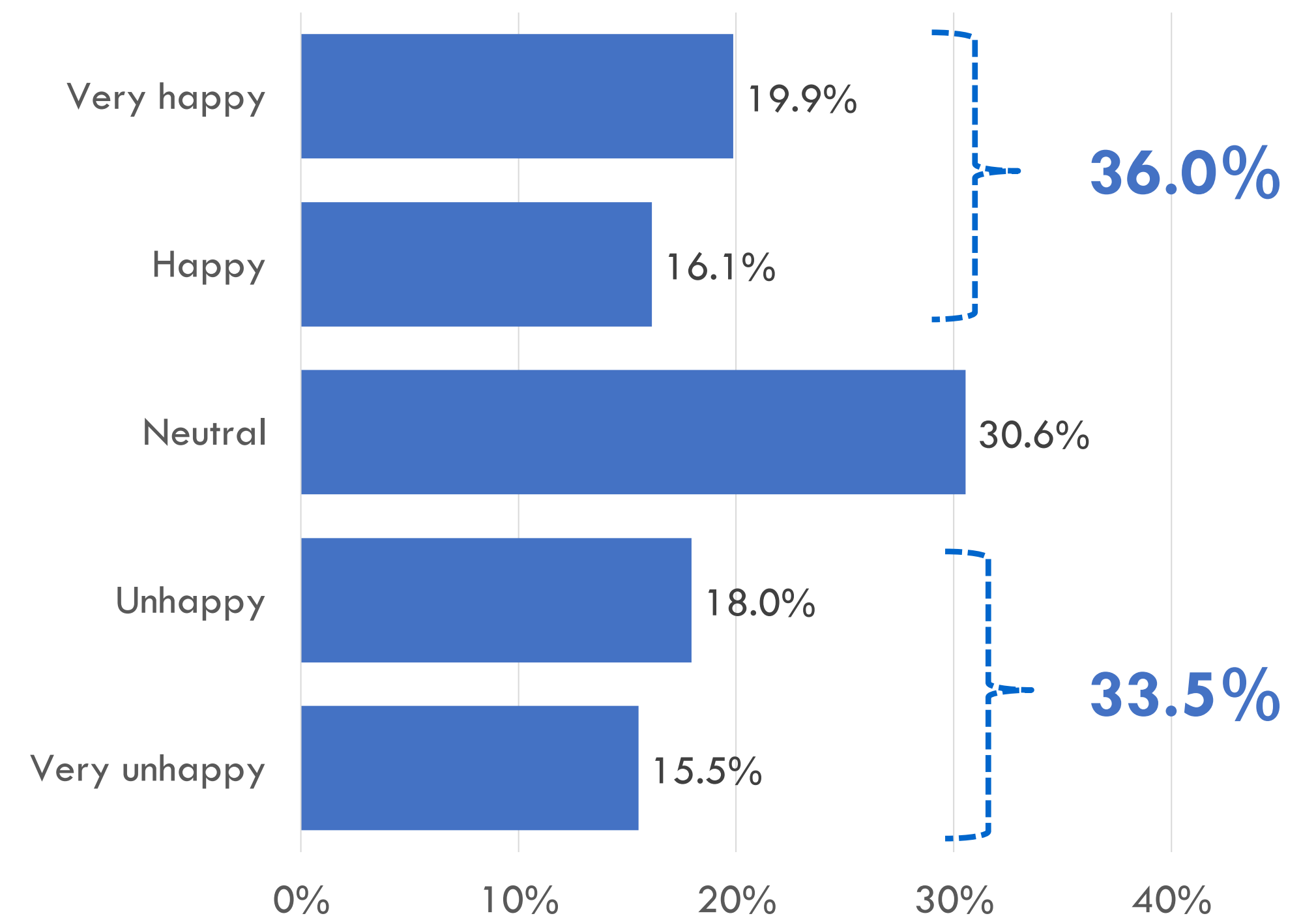


# School Re-opening

**Question:** Do you expect that your child/children's school will be open this Fall for in-person education?



**Question:** Which best describes how you currently feel about the possibility of your child/children's school being open this Fall for in-person education?

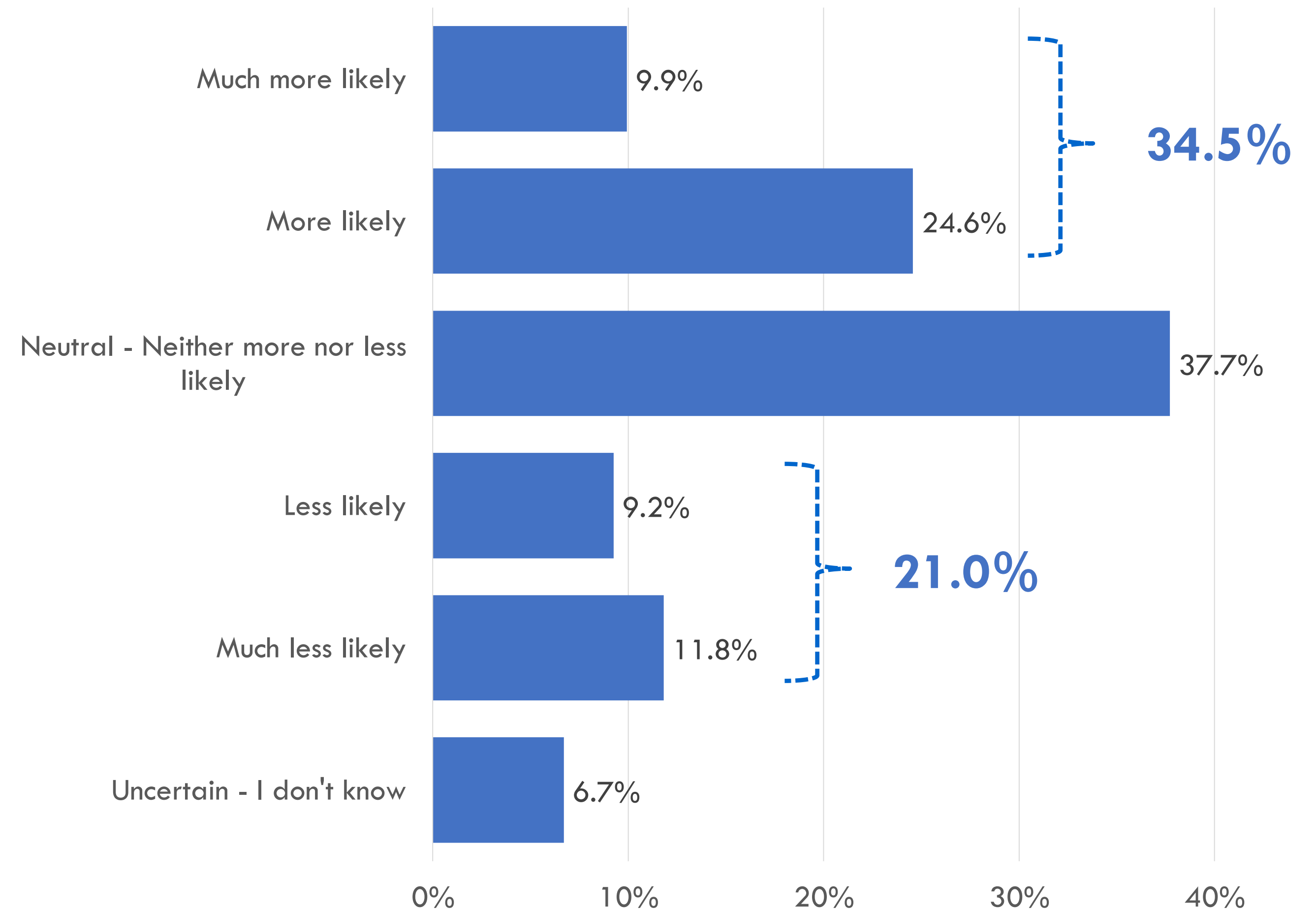


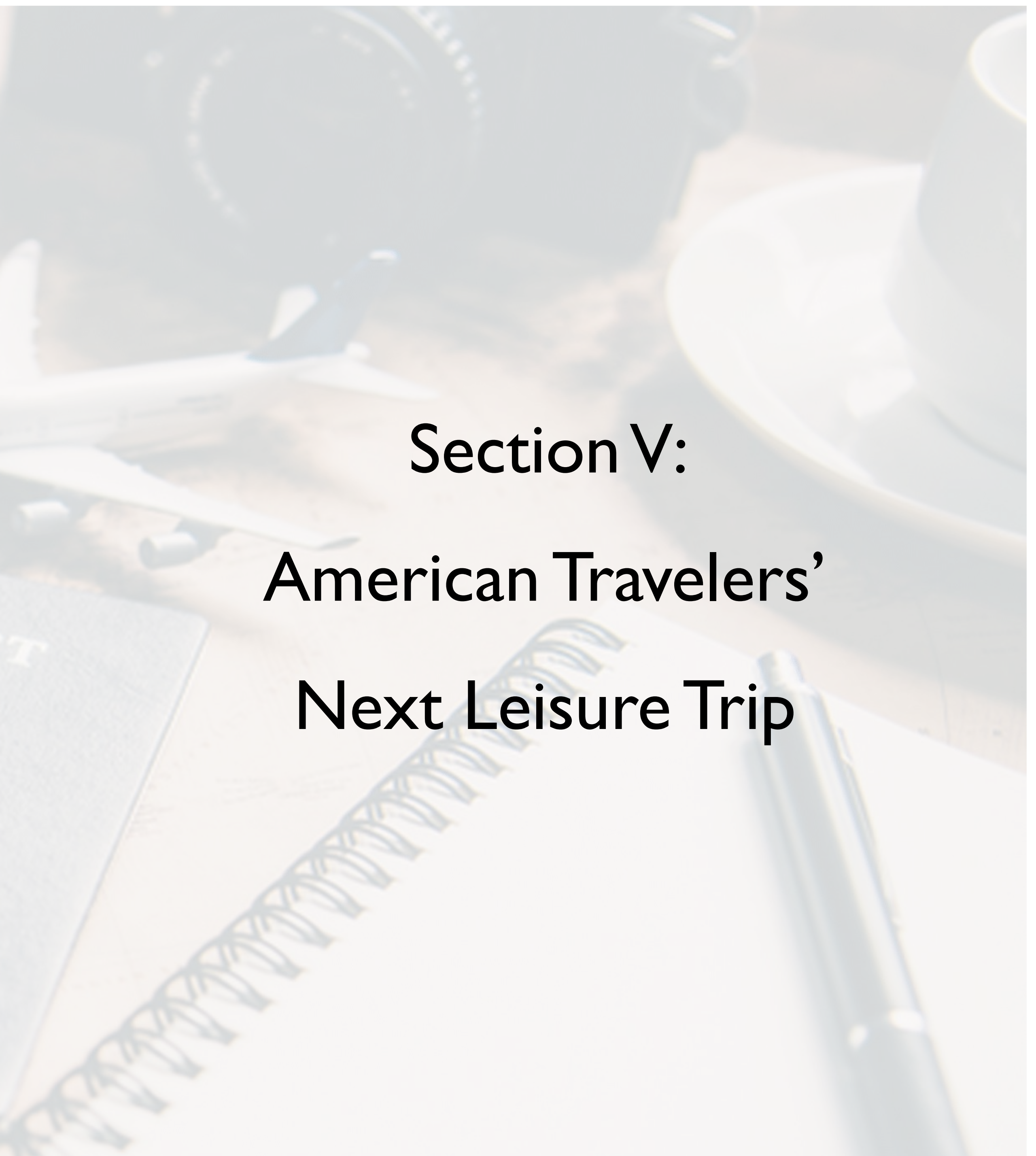
# Likelihood of Traveling More if Schools Don't Re-open for In-person Education

**Question:** Imagine that your school(s) **DO NOT OPEN** for in-person education this Fall. How likely would you be to take more family trips this Fall because you are not tied to a traditional educational schedule? (Select one to fill in the blank)

I would be \_\_\_\_\_ to take additional family trips if not constrained by a traditional schedule.

*(Base: Wave 21 data. Respondents with school age children, 307 completed surveys. Data collected July 31-August 2, 2020)*





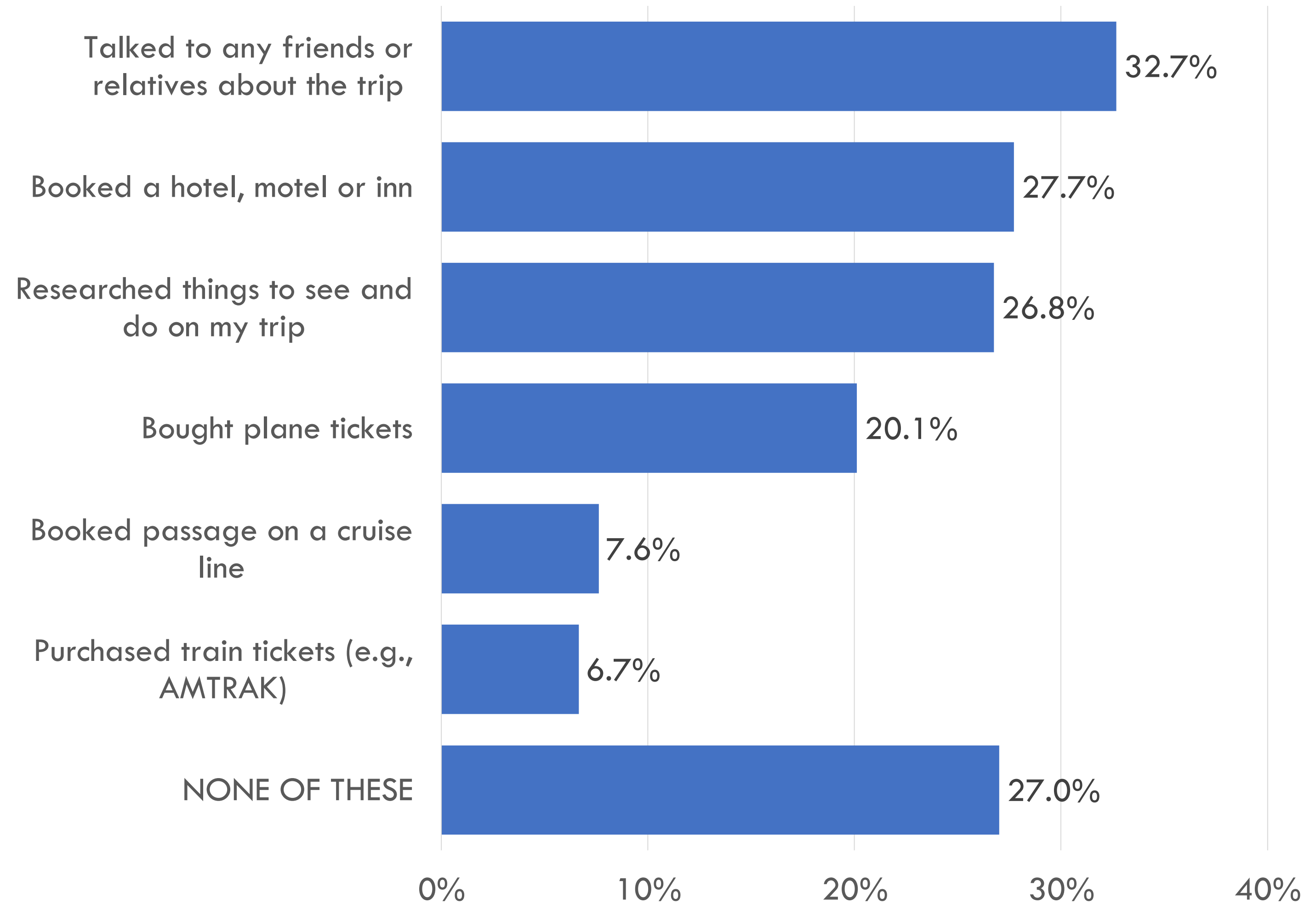
**Section V:  
American Travelers'  
Next Leisure Trip**



# Travel Planning Tasks Completed

**Question:** Have you already done any of the following in preparation for your NEXT LEISURE TRIP?

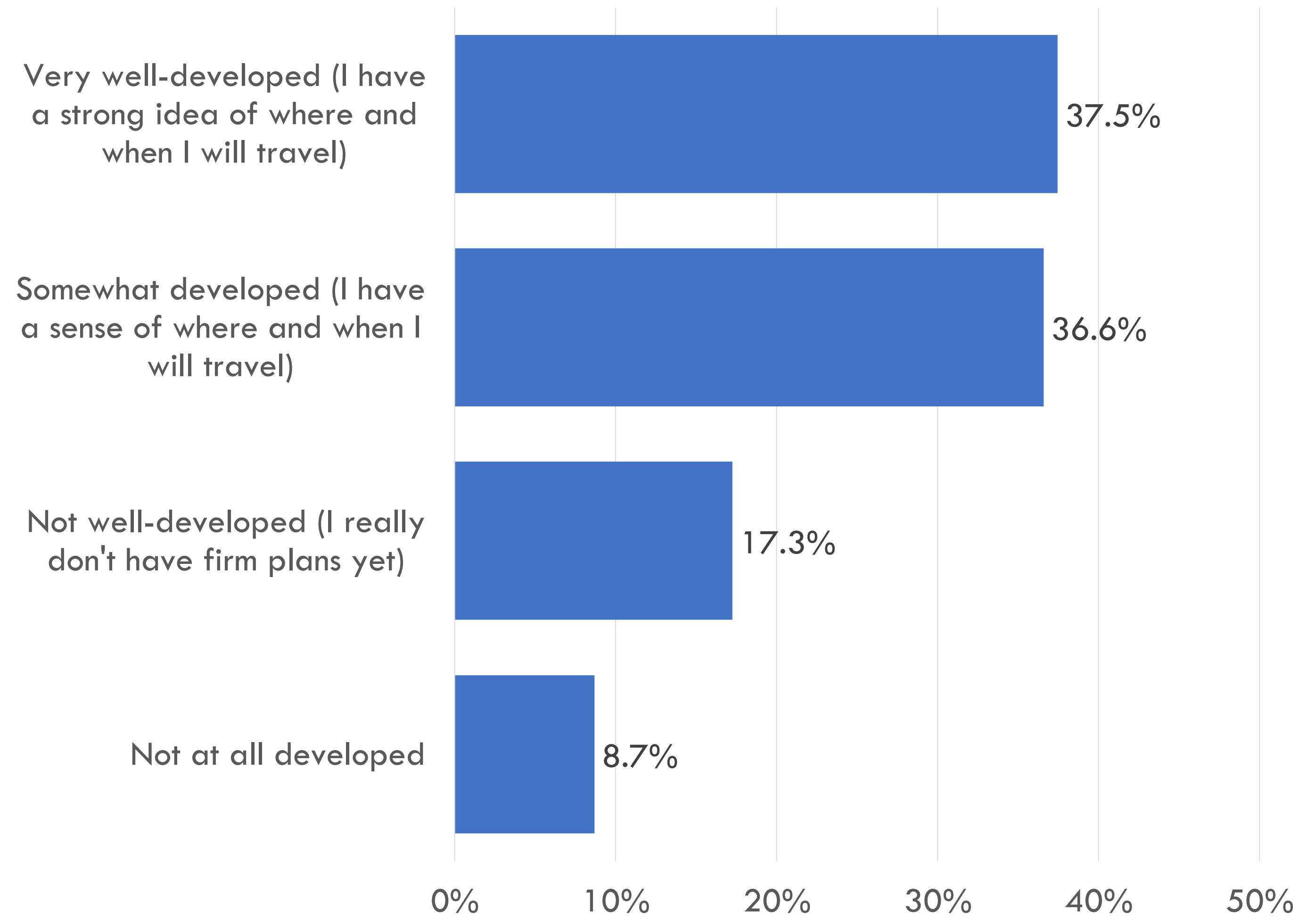
*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*



# How Well-Developed is the Trip Idea

**Question:** Right now, which best describes **HOW WELL-DEVELOPED** the idea of this next leisure trip is in your mind?

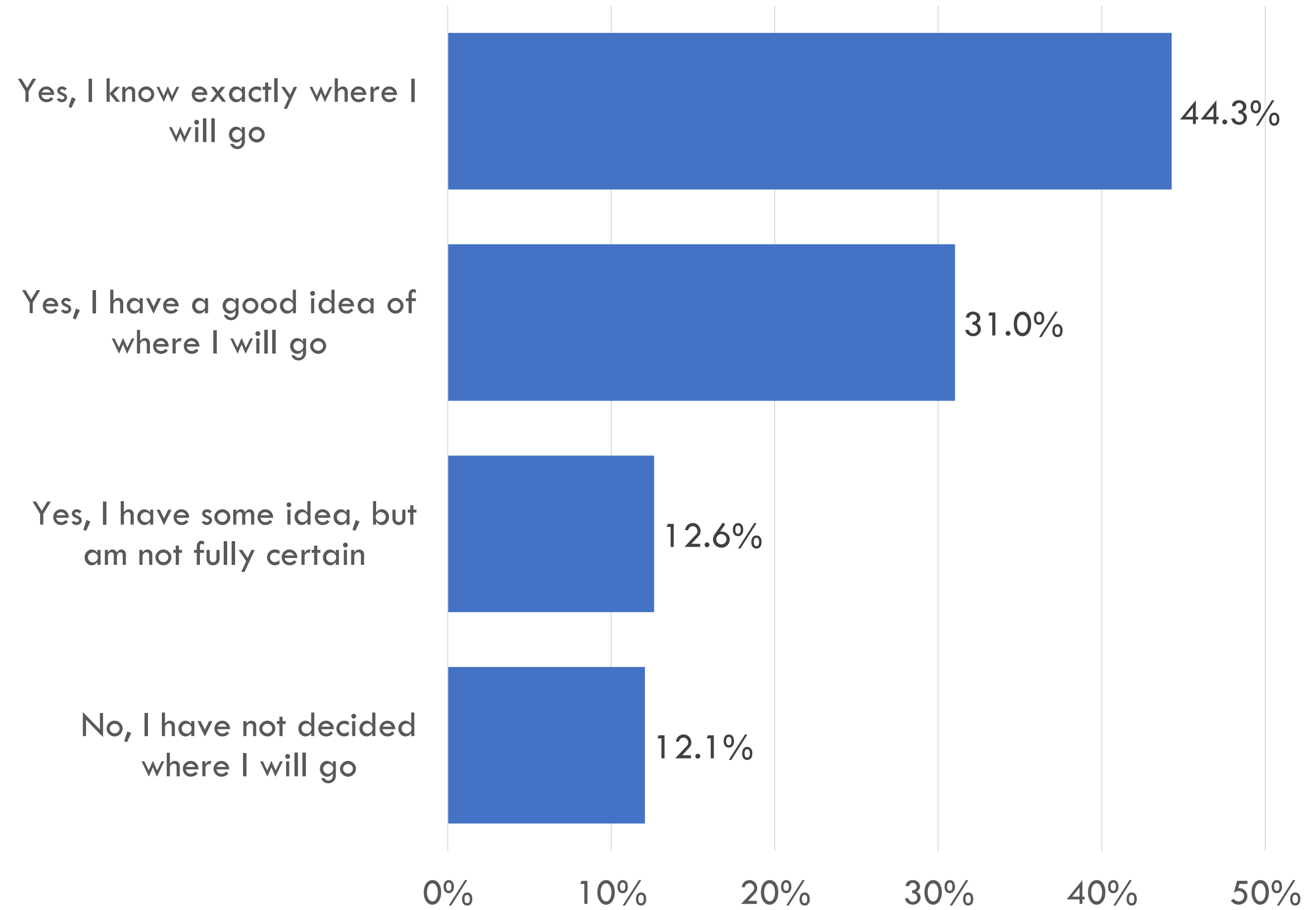
*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*



# Destination Selection Status

**Question:** Have you **SELECTED THE DESTINATION(S)** you will visit on your next leisure trip? (Select the one that best describes you)

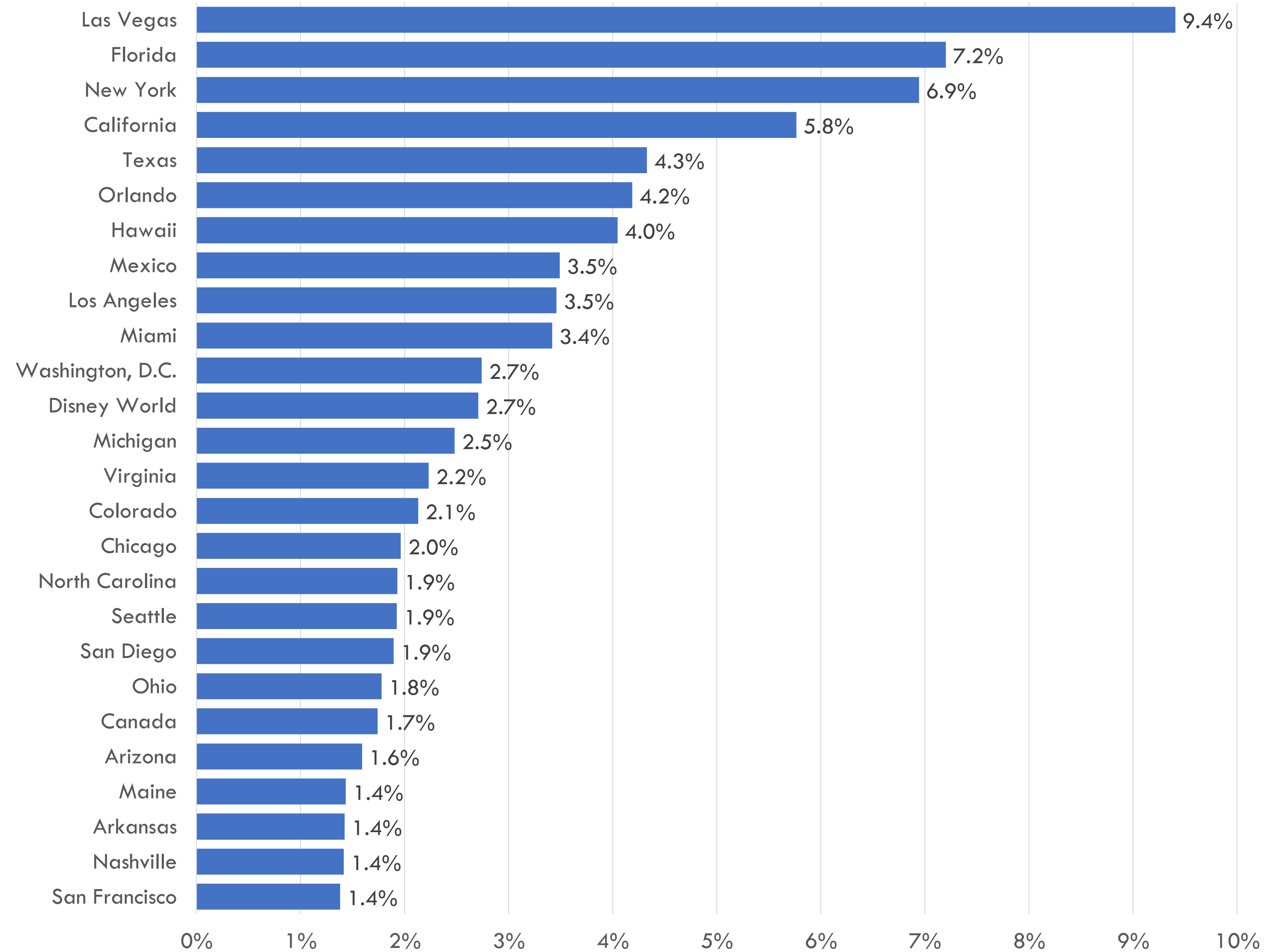
*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*



# Destinations Likely to Visit

**Question:** What destinations are you likely to visit on this trip? (Write in up to five)

*(Base: Wave 21 data. Respondents who have a destination in mind, 467 completed surveys. Data collected July 31-August 2, 2020)*

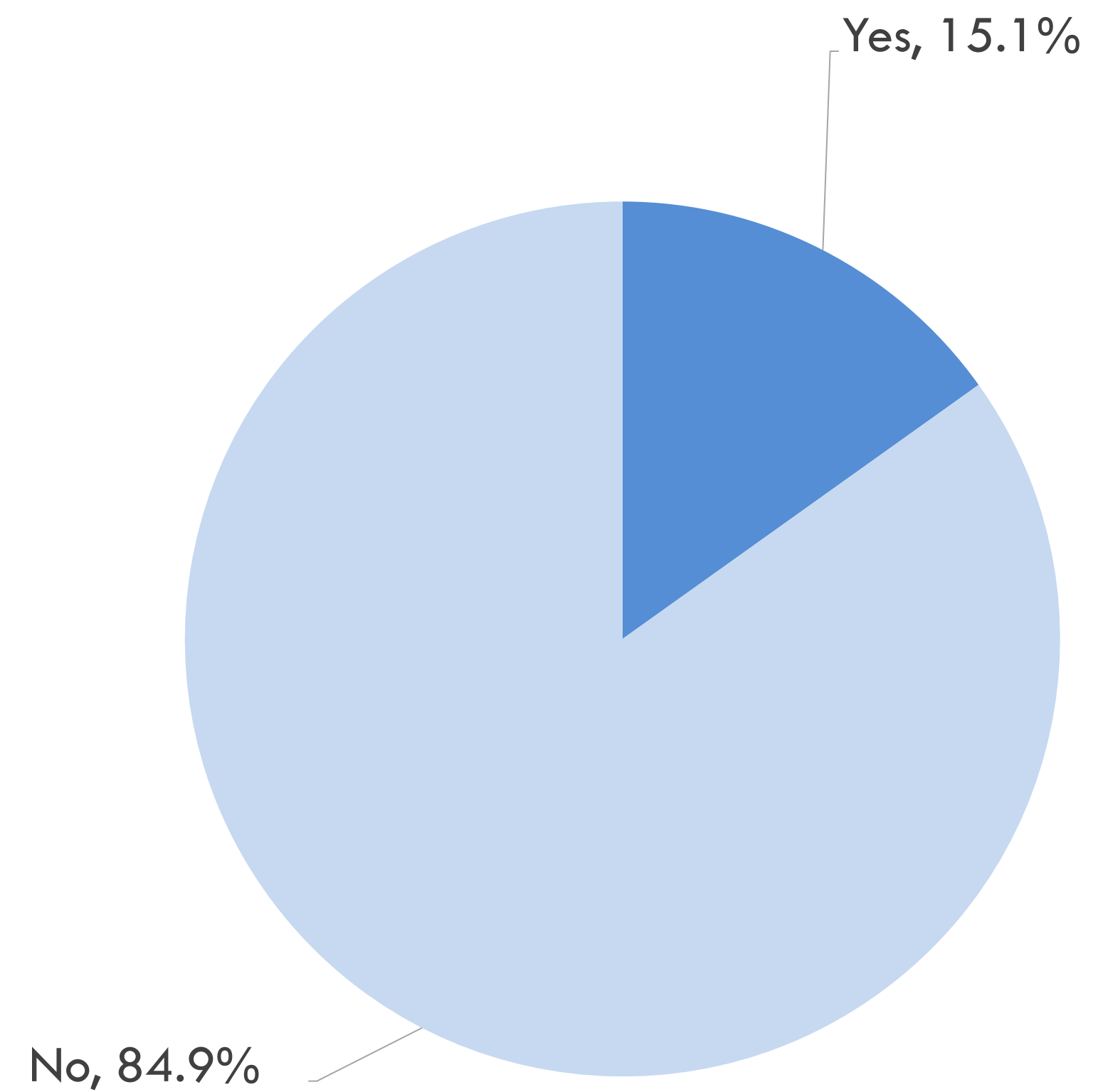


# Destinations Considered but Rejected Due to Coronavirus Situation

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**Question:** Did you consider any domestic destinations for this trip that you ultimately decided not to visit specifically because of Coronavirus-related concerns?

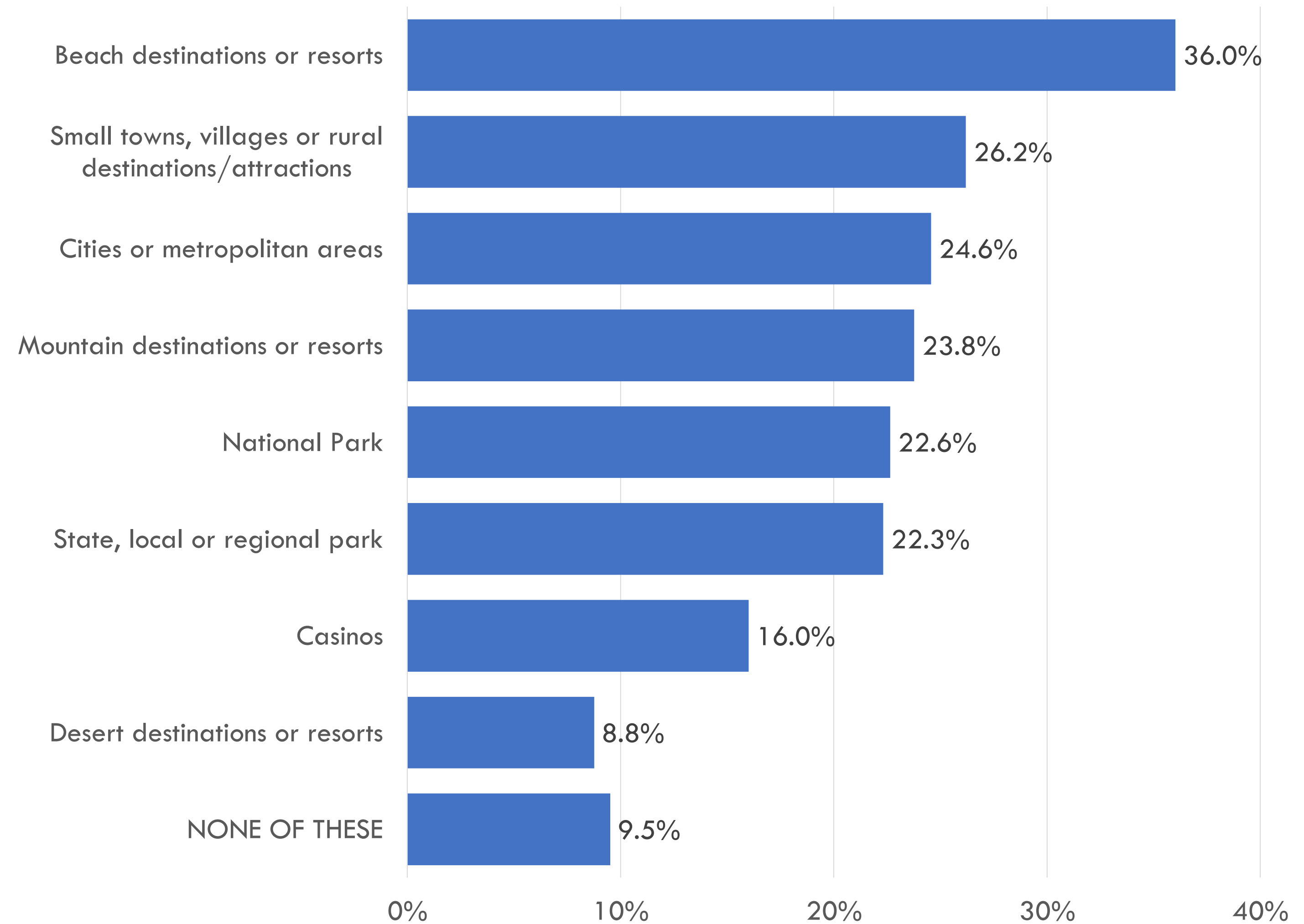
*(Base: Wave 21 data. Respondents having destinations in mind already, 598 completed surveys. Data collected July 31-August 2, 2020)*



# Destination Types on Next Trip

**Question:** Which of the following will you be likely to visit on your NEXT LEISURE TRIP? (Select all that apply)

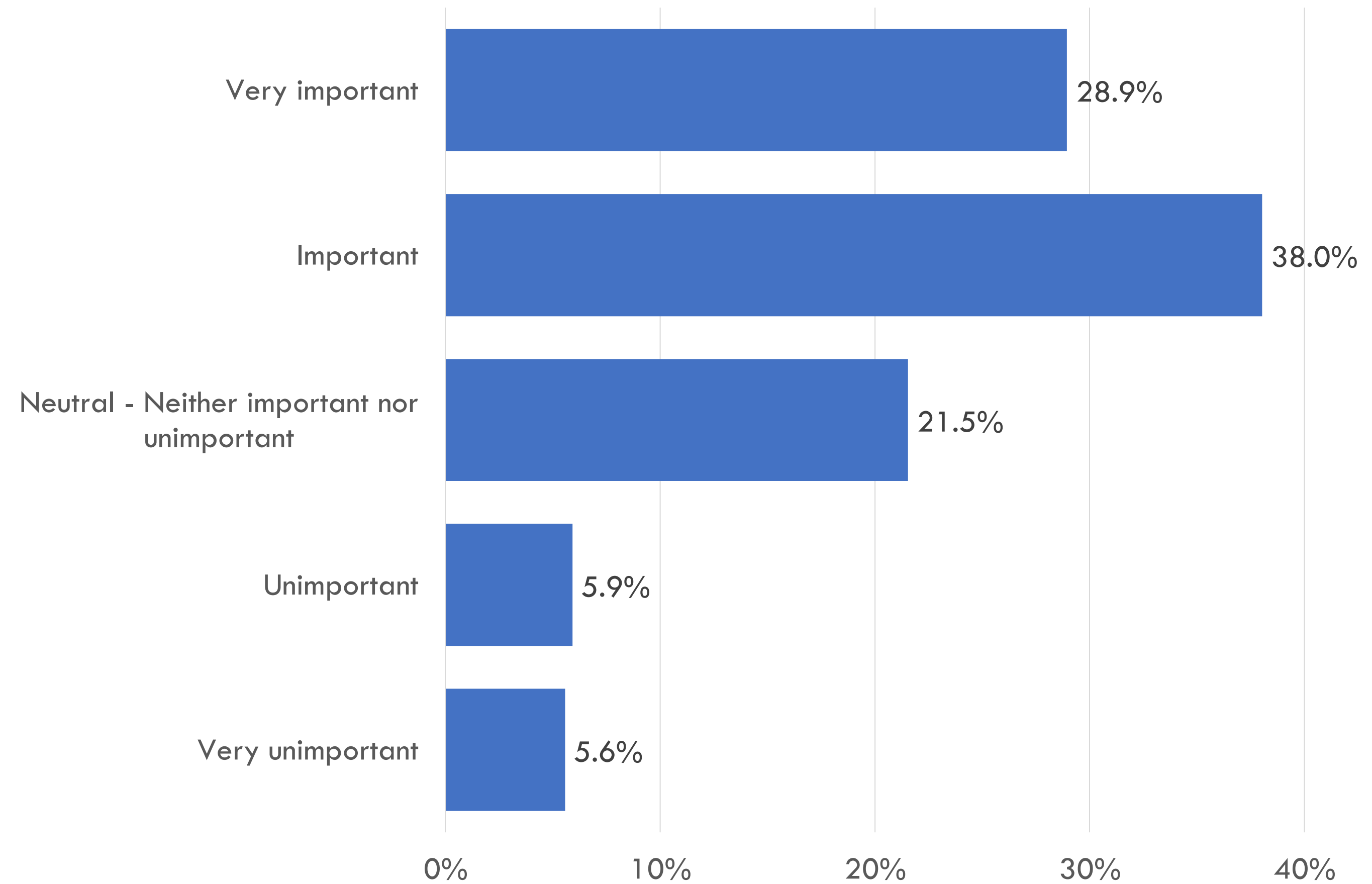
*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*



# Importance of Coronavirus-Related Safety Concerns to Destination Selection

**Question:** How important was (or will be) **CORONAVIRUS-RELATED SAFETY CONCERNS** to how you selected (or will select) the destinations you will visit on your next leisure trip?

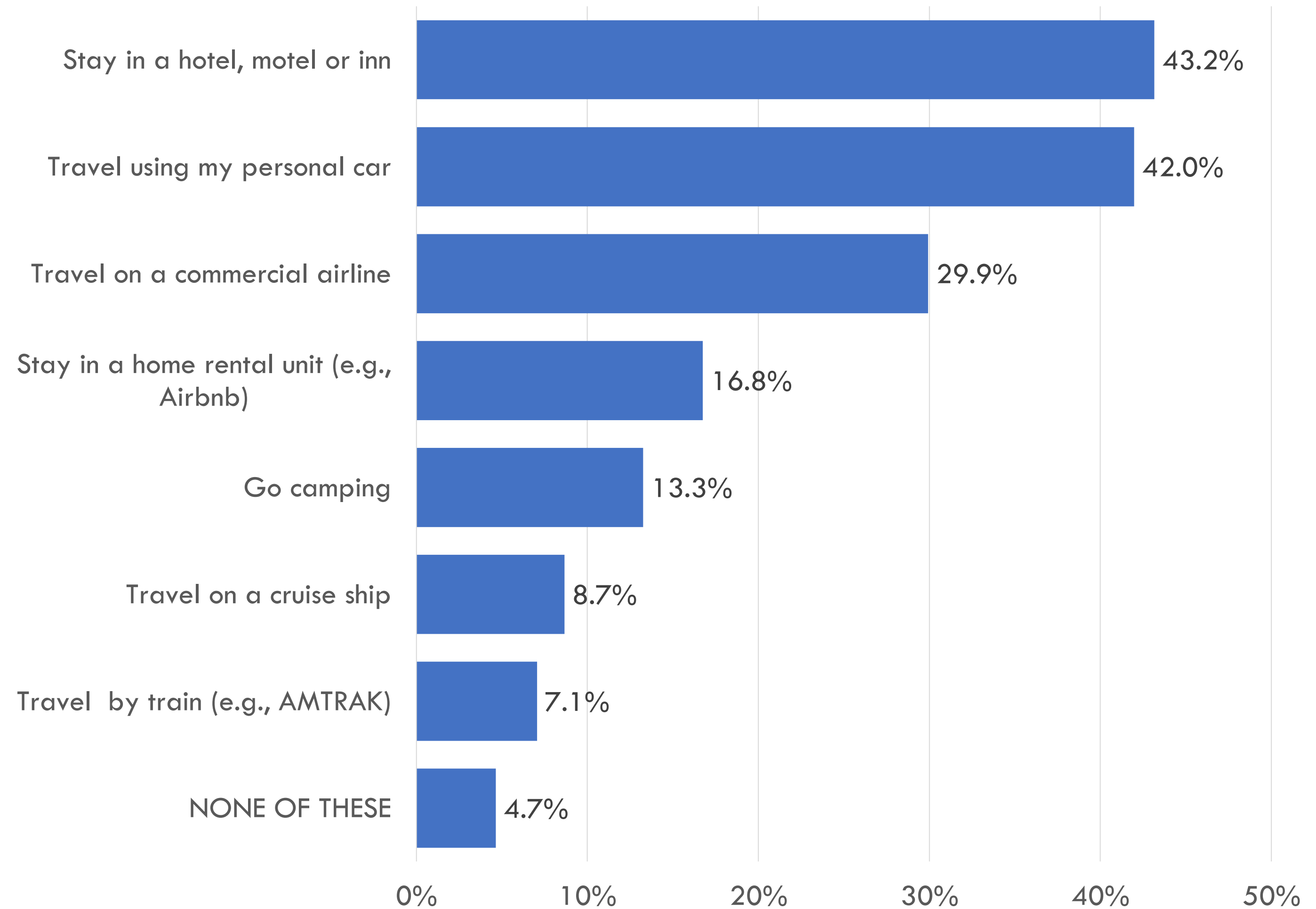
*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*



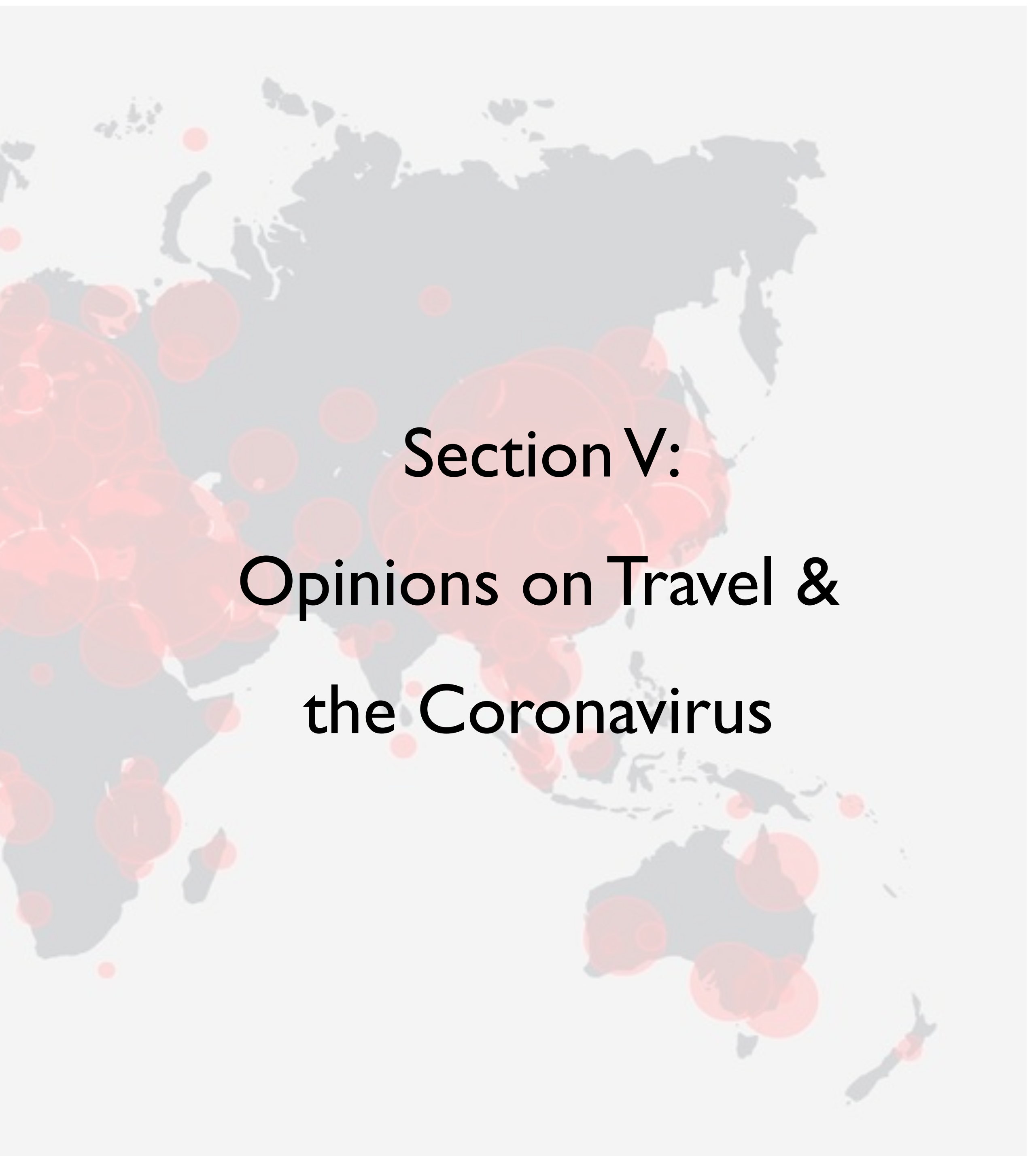
# Likely Travel Activities During Next Leisure Trip

**Question:** Which of the following will you be likely to do on your NEXT LEISURE TRIP? (Select all that apply)

*(Base: Wave 21 data. All respondents planning a trip in 2020, 598 completed surveys. Data collected July 31-August 2, 2020)*





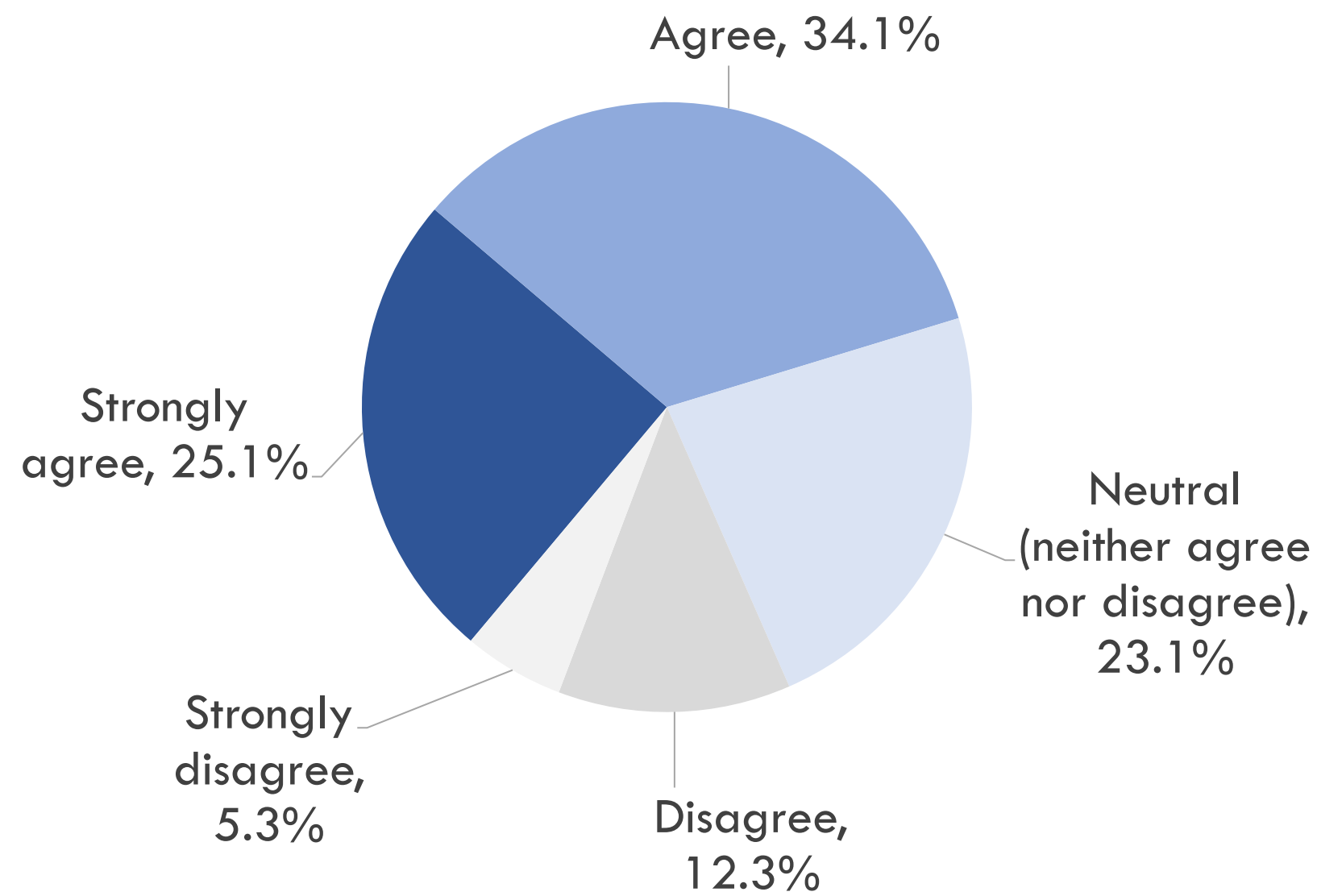


Section V:  
Opinions on Travel &  
the Coronavirus

# Community Social Distancing

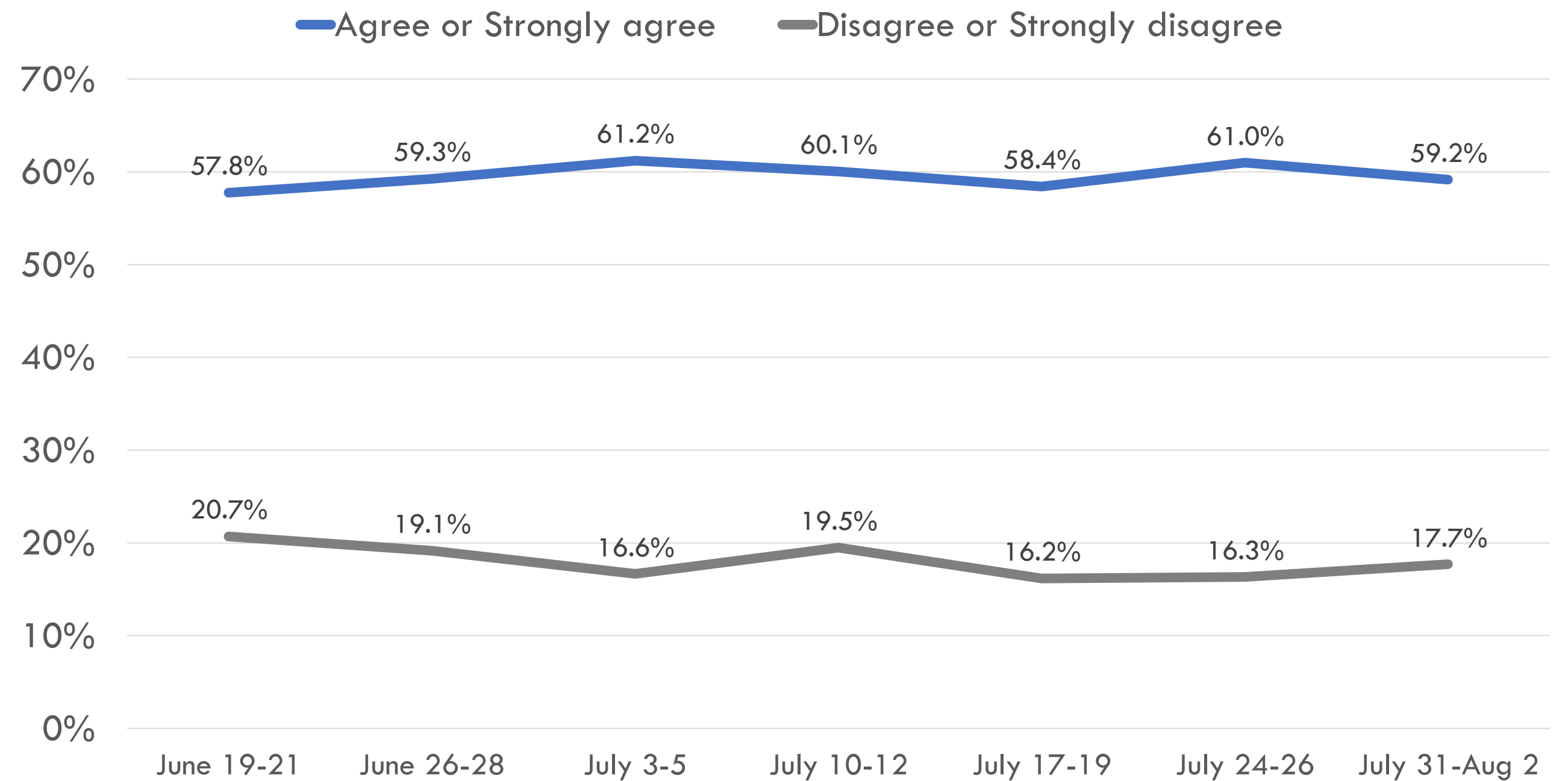
**How much do you agree with the following statement?**

**Statement:** In my community, too many people are NOT maintaining appropriate social distancing when in public.



(Base: All respondents, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected June 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-Aug 2, 2020)

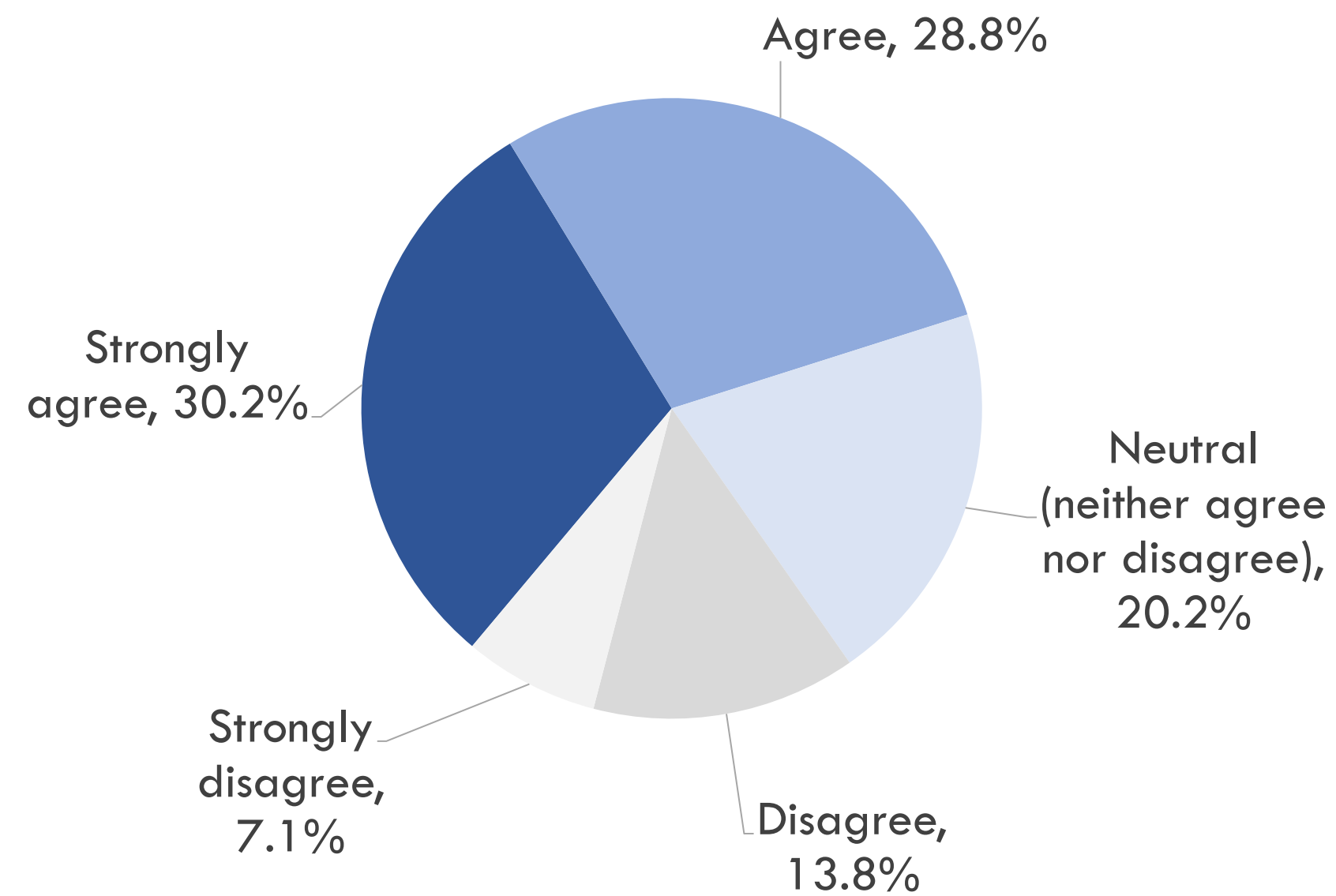
## Historical data



# Avoiding Travel Until the Crisis Blows Over

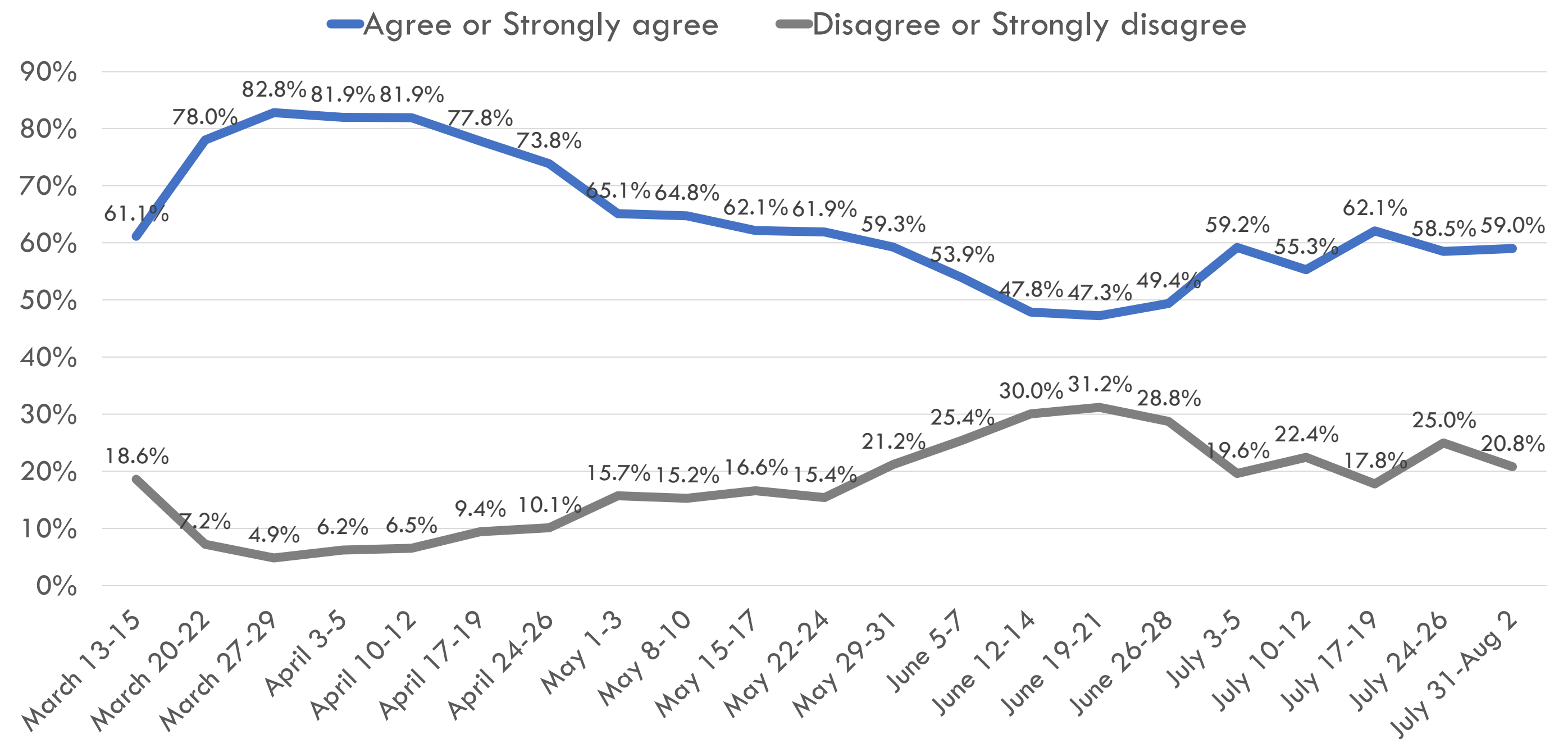
**How much do you agree with the following statement?**

**Statement:** I'm planning to avoid all travel until the coronavirus situation blows over.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

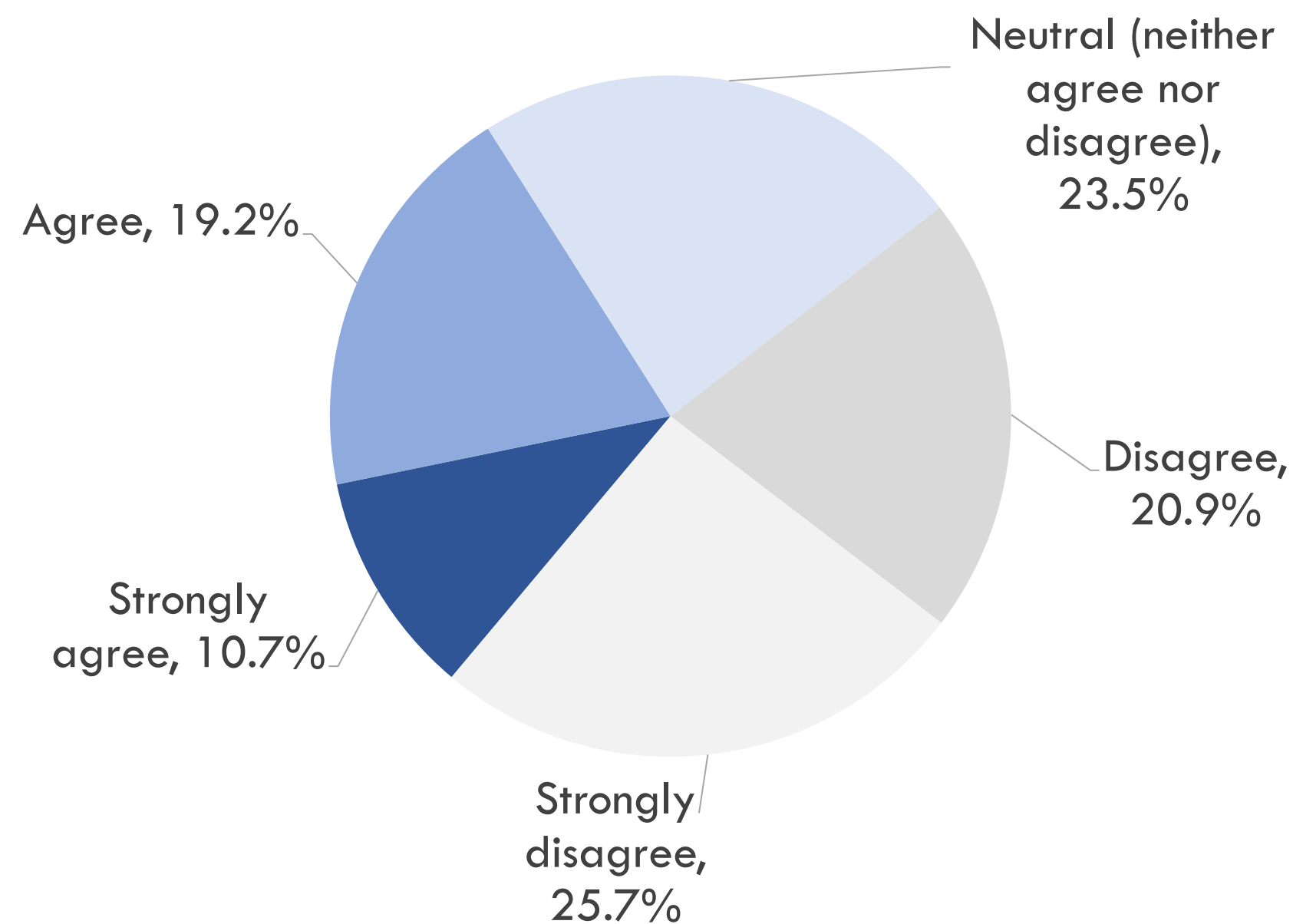
## Historical data



# Expectations for Traveling in the Fall

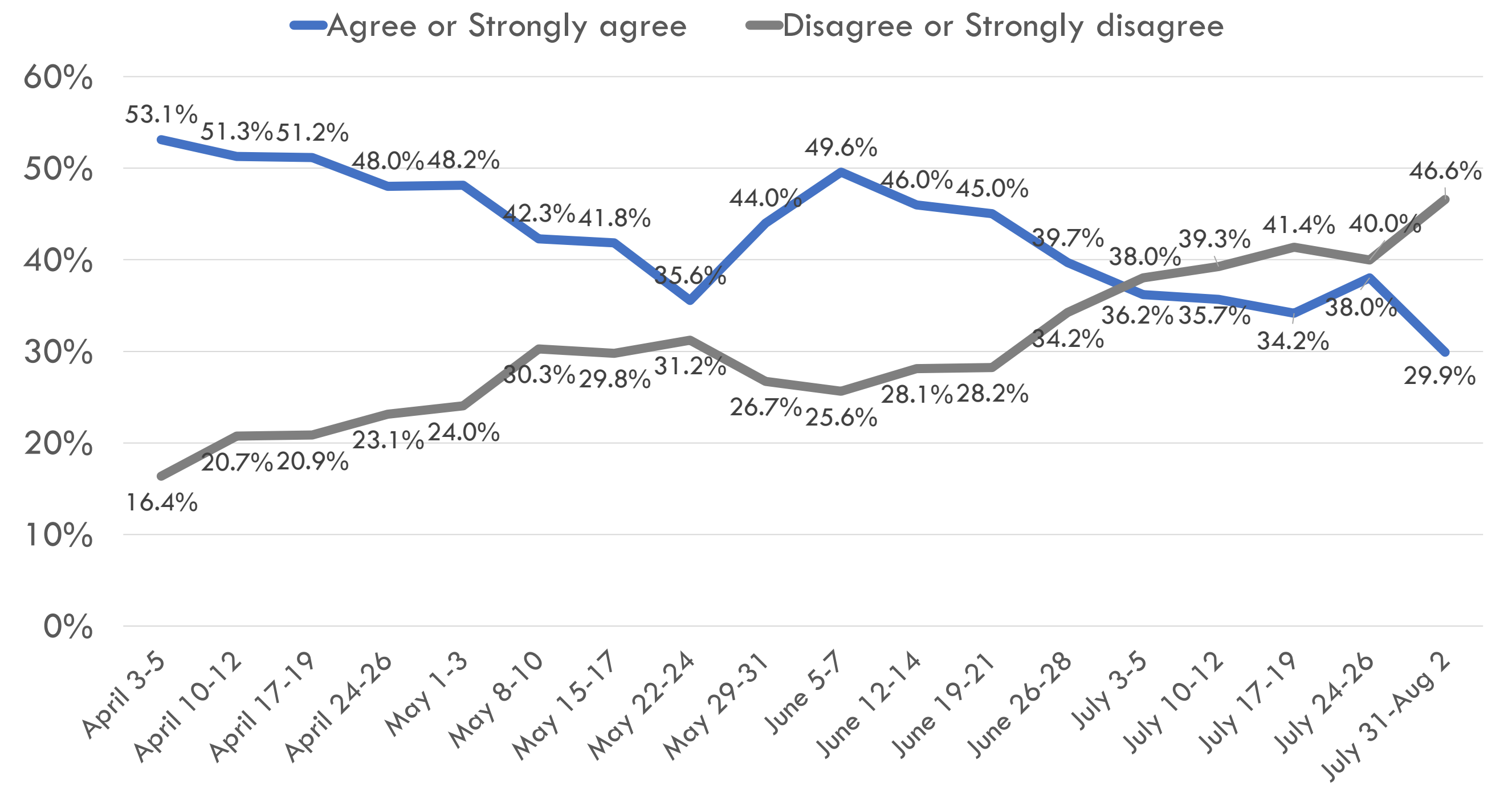
**How much do you agree with the following statement?**

**Statement:** I expect that I will be traveling in the Fall of 2020.



(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

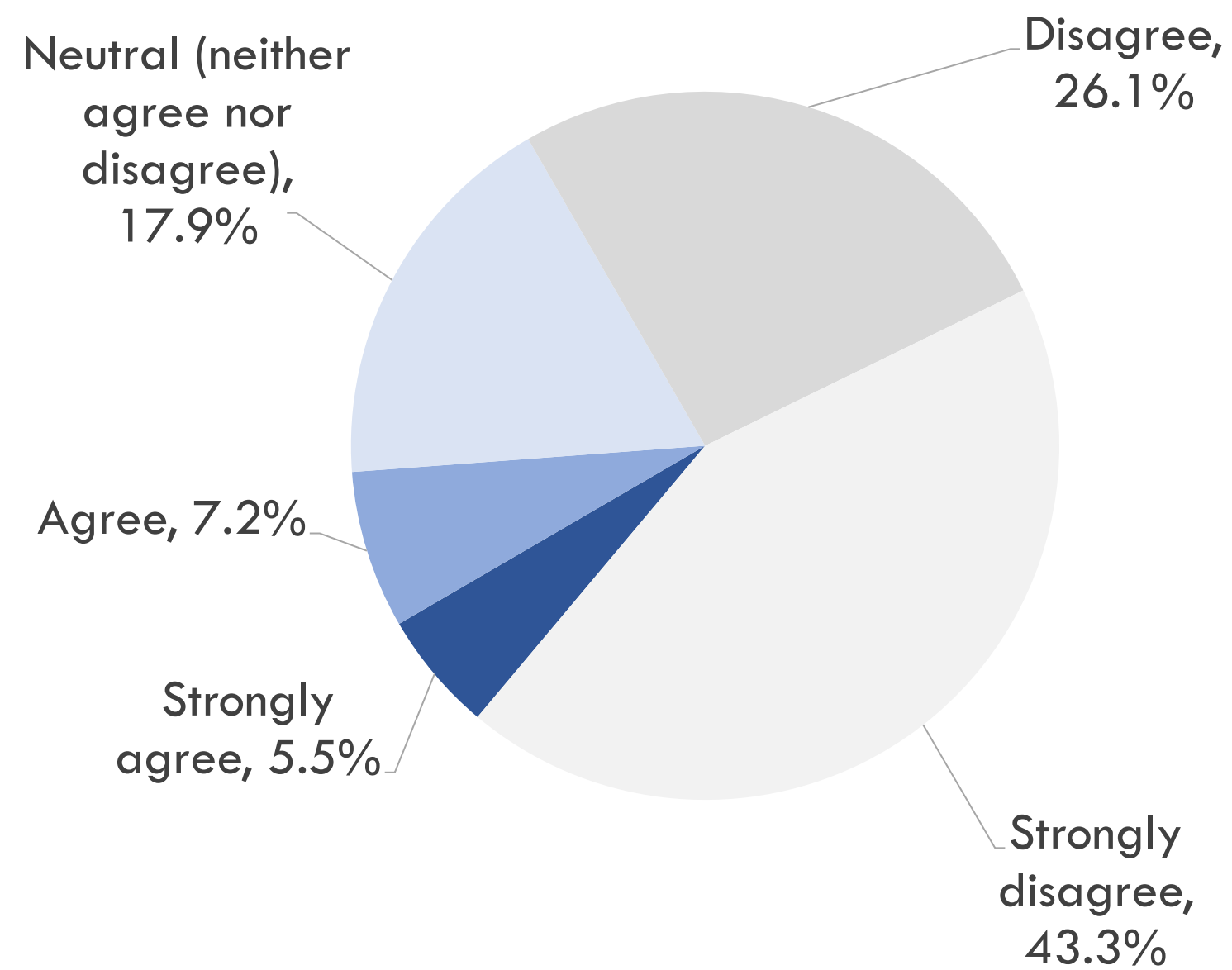
## Historical data



# Expectations for Fall Travel Season

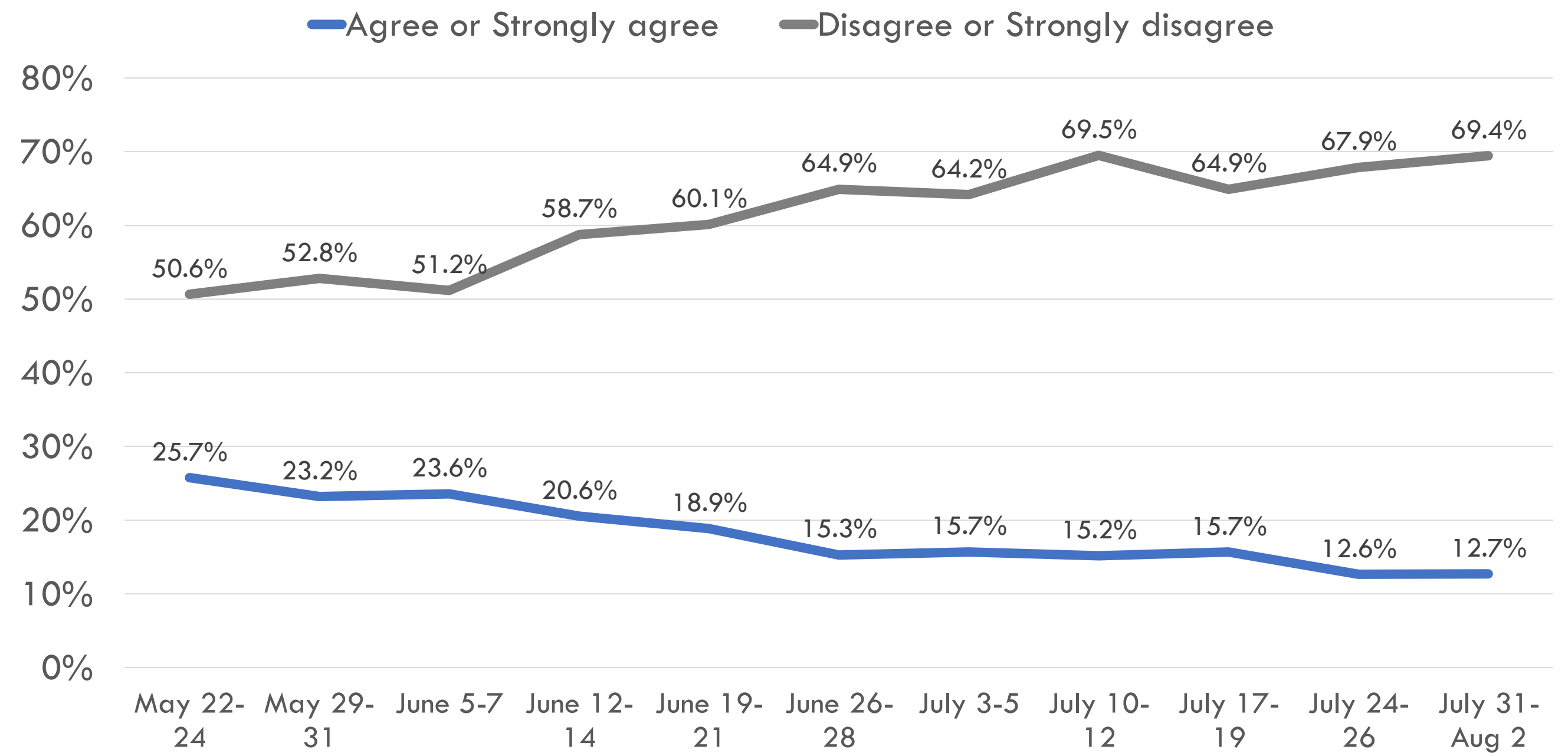
**How much do you agree with the following statement?**

**Statement:** I expect the coronavirus situation will be resolved before Fall begins.



(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

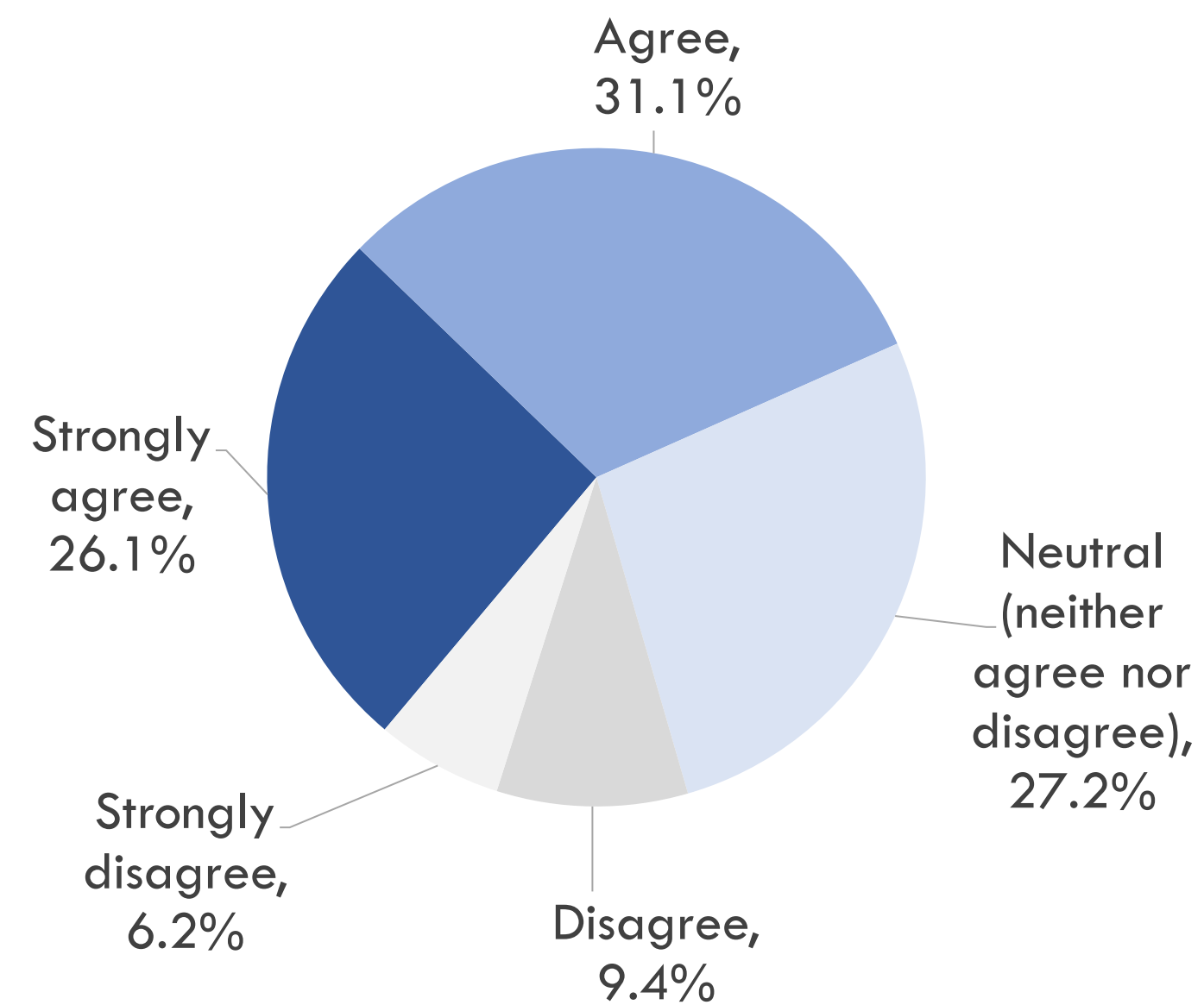
## Historical data



# Staycations as a Replacement for Vacations

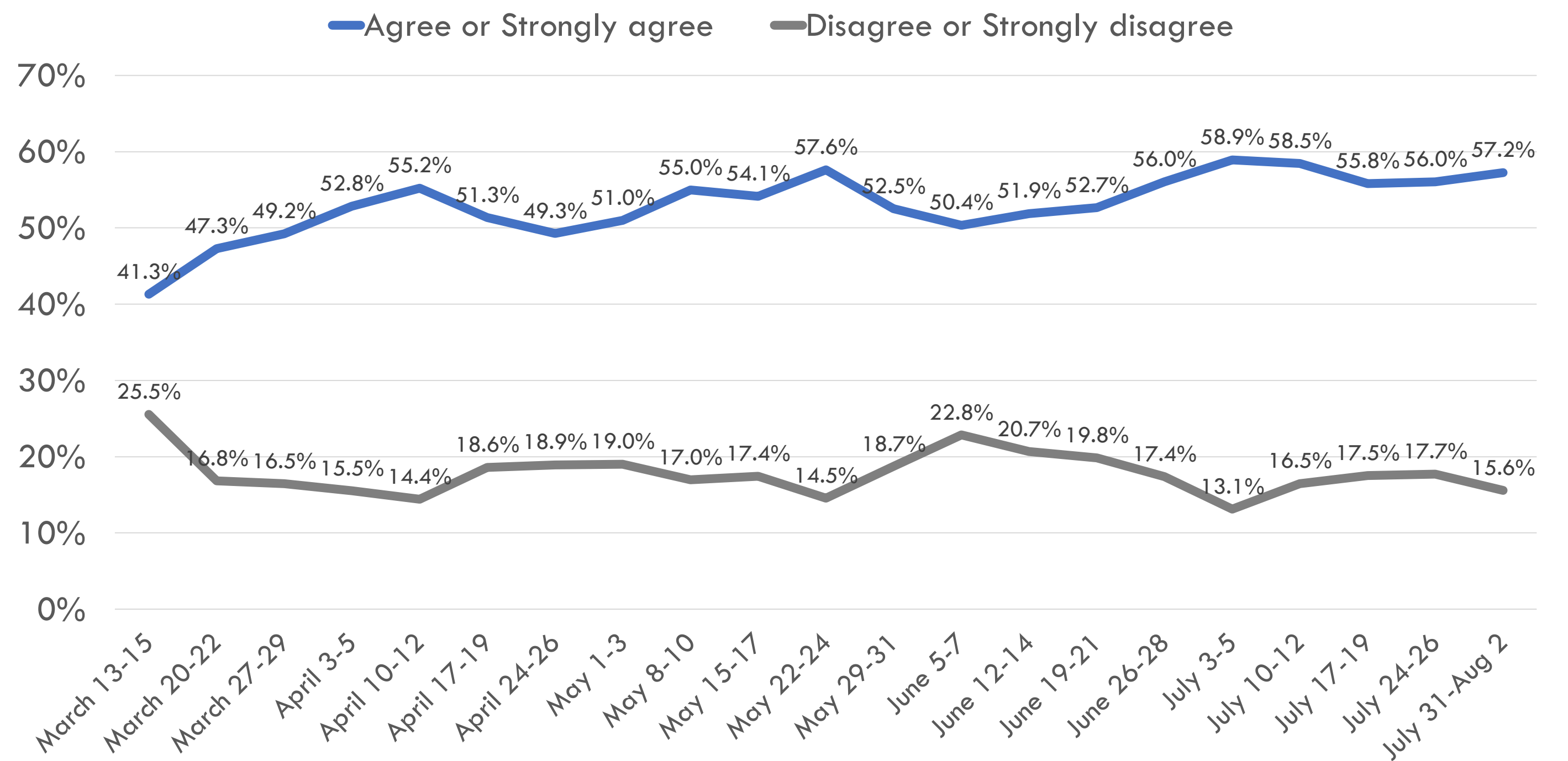
**How much do you agree with the following statement?**

**Statement:** Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

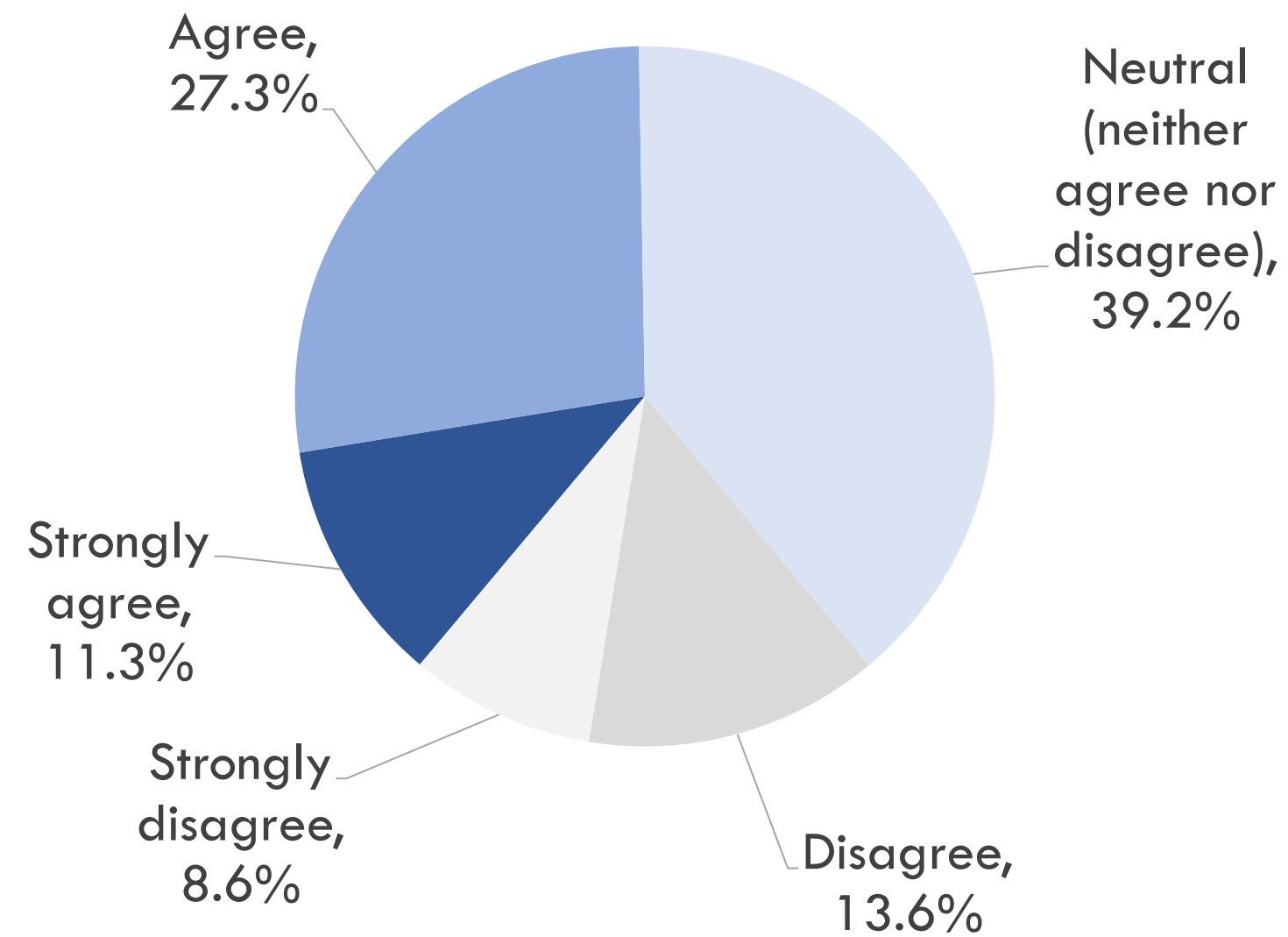
## Historical data



# Replacing Air Travel With Road Trips

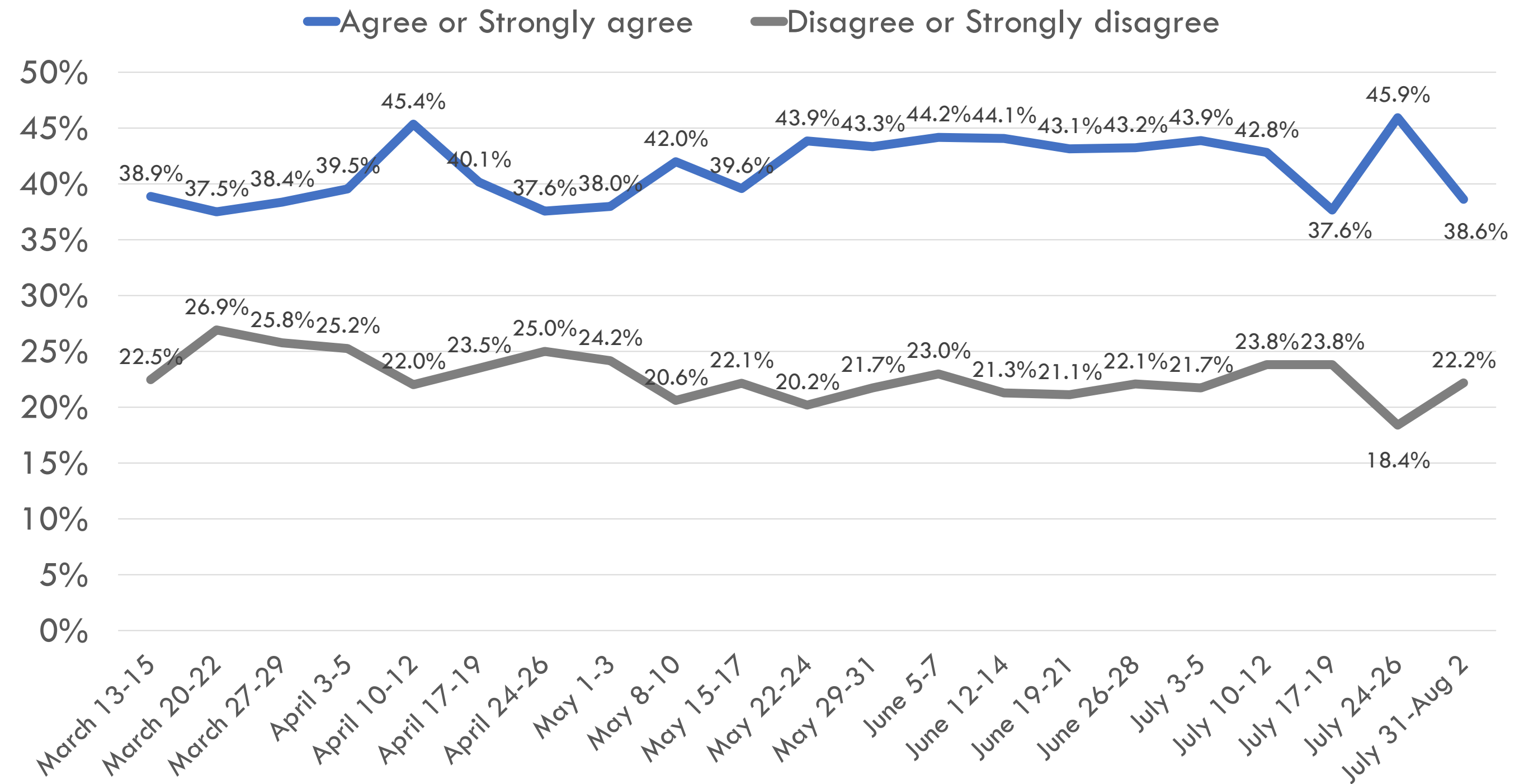
## How much do you agree with the following statement?

**Statement:** Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

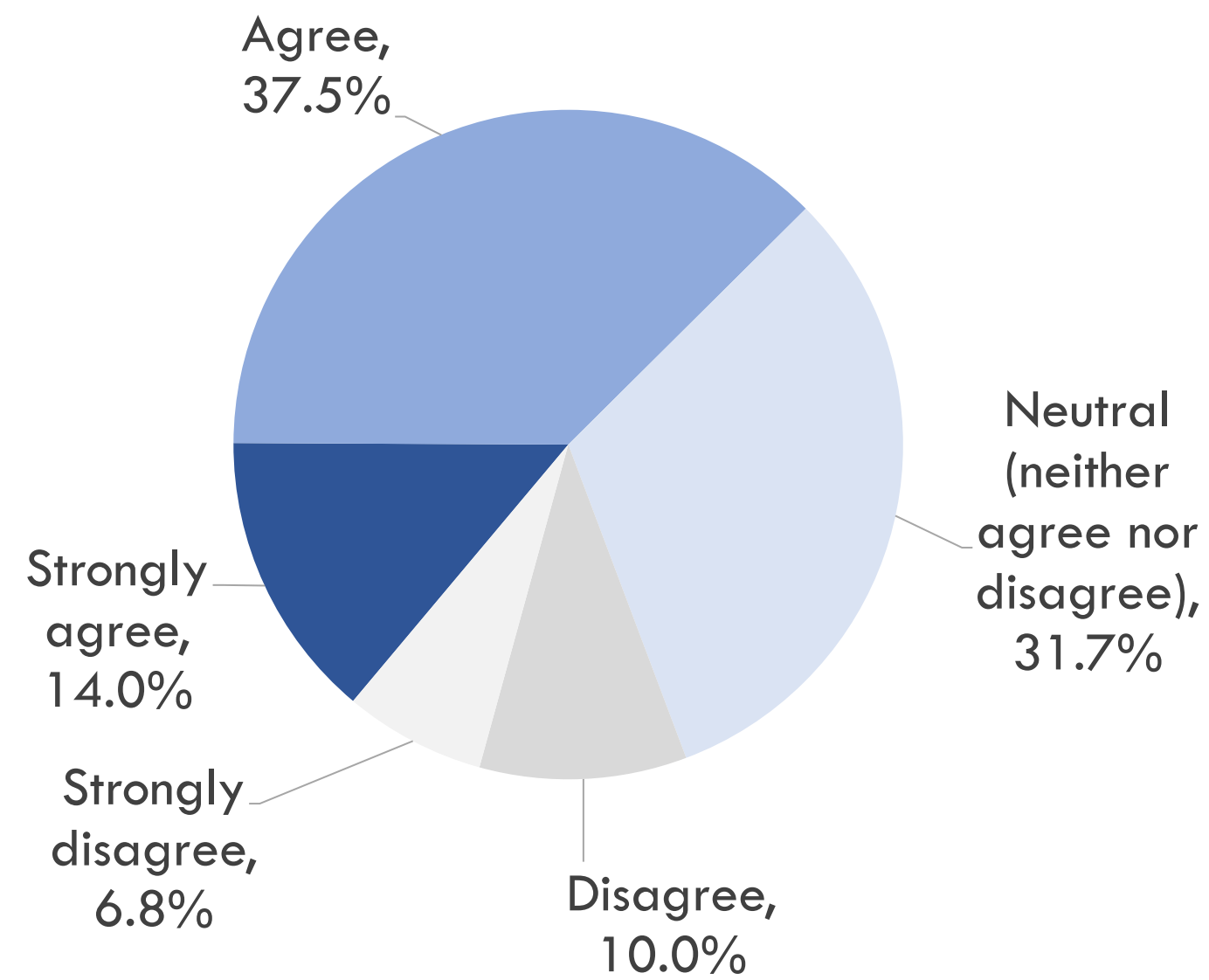
### Historical data



# Replacing Long-Haul Travel with Regional Trips

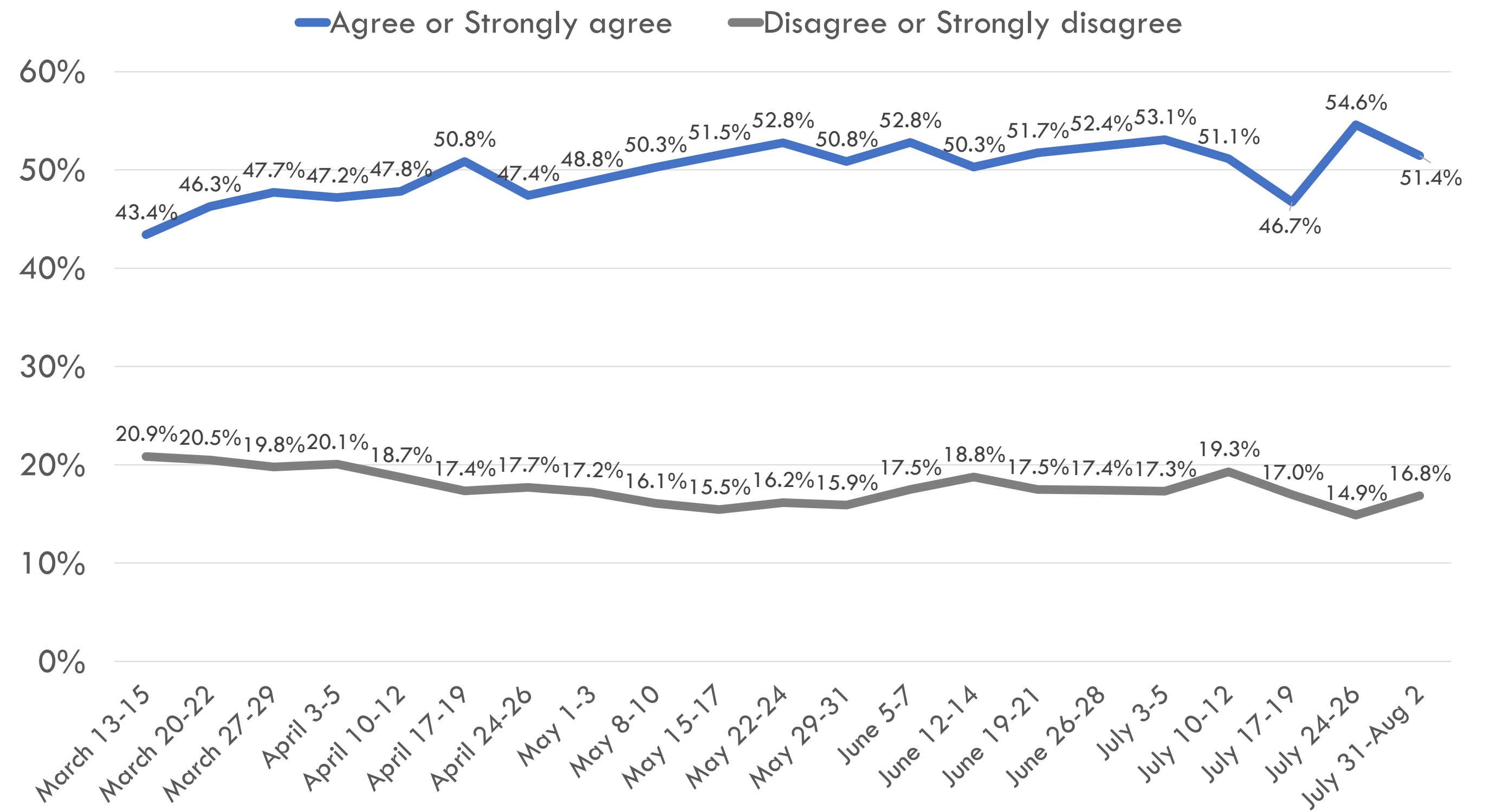
**How much do you agree with the following statement?**

**Statement:** Because of the coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

## Historical data

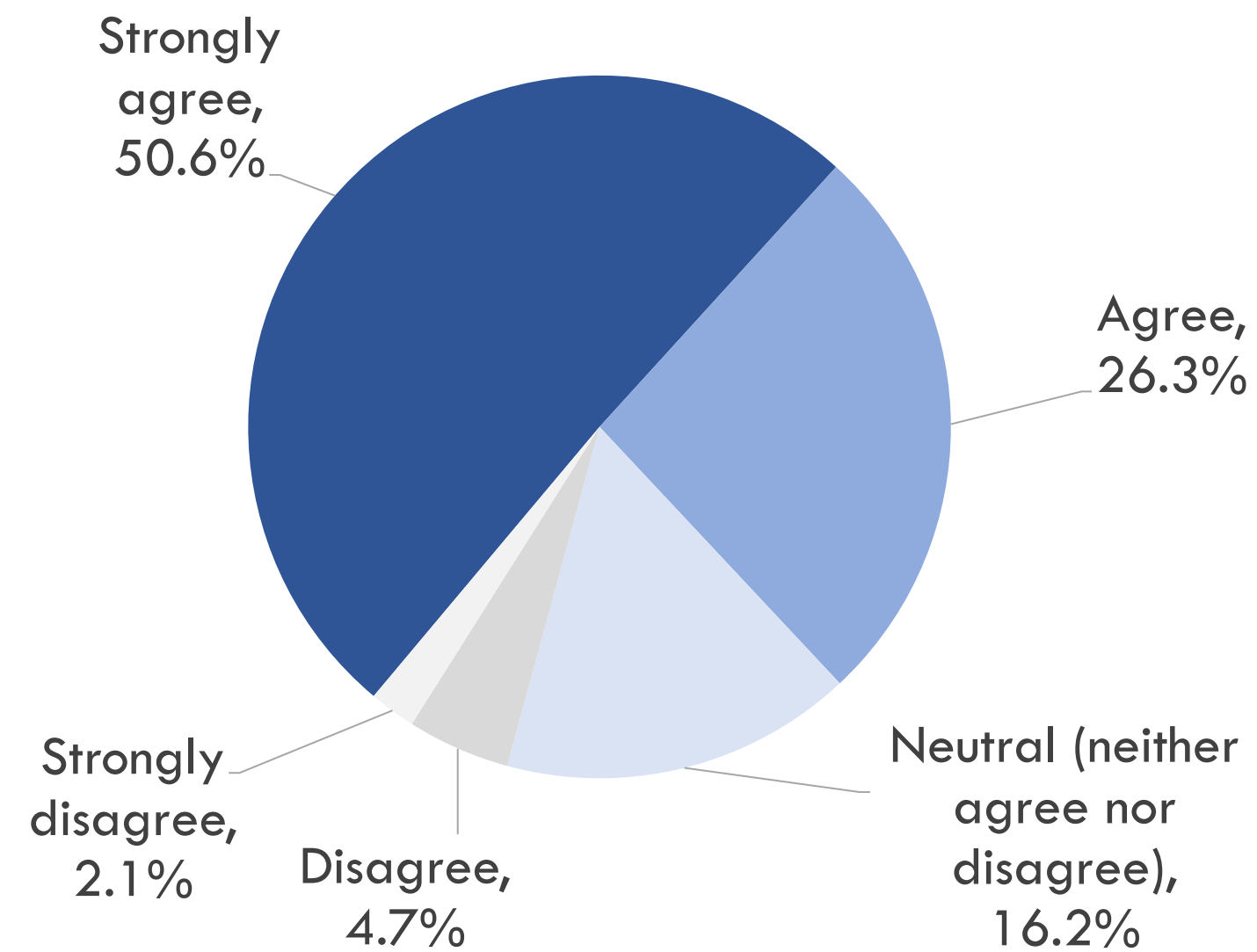




# Avoiding Conventions & Conferences

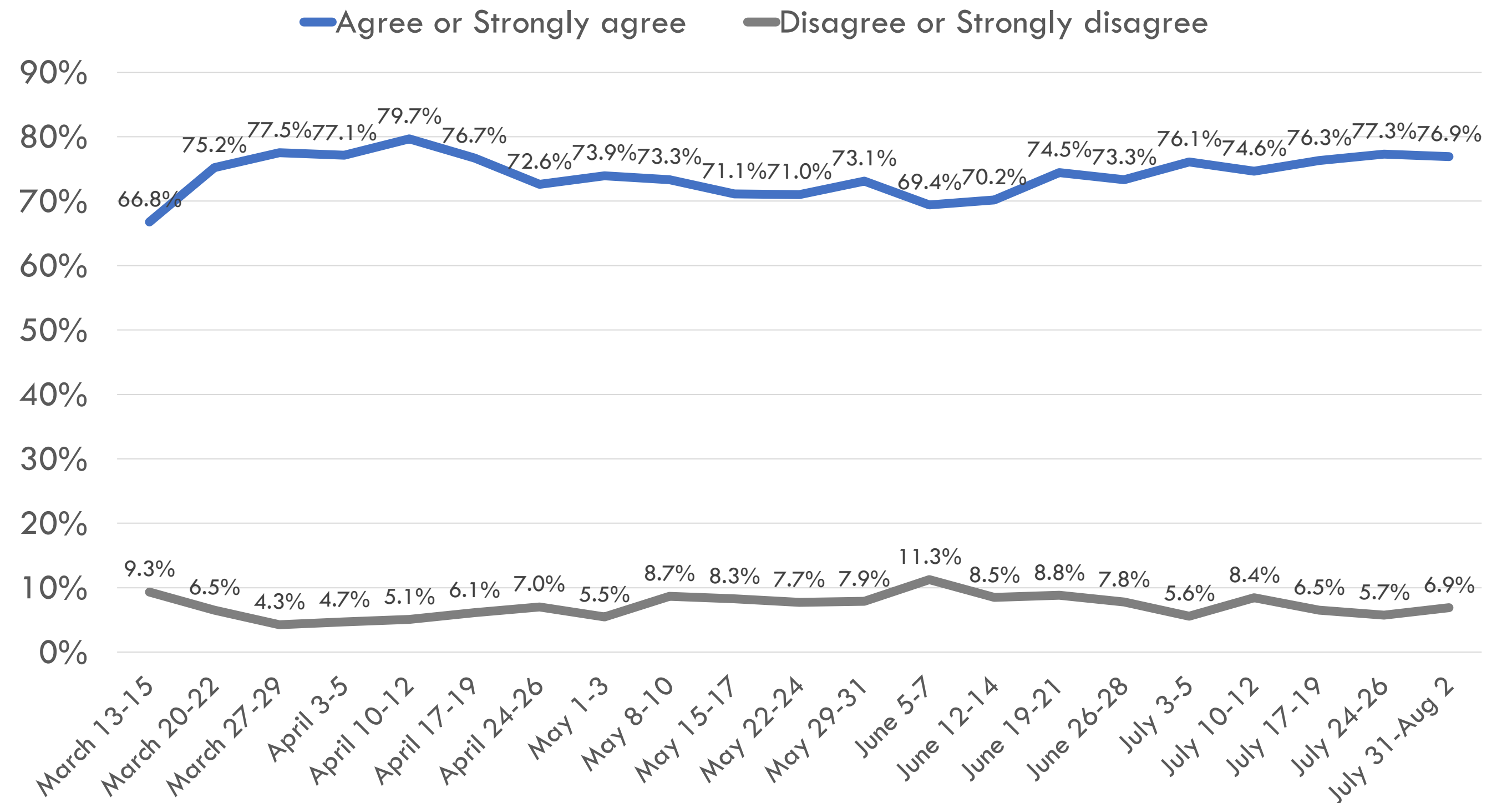
**How much do you agree with the following statement?**

**Statement:** I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

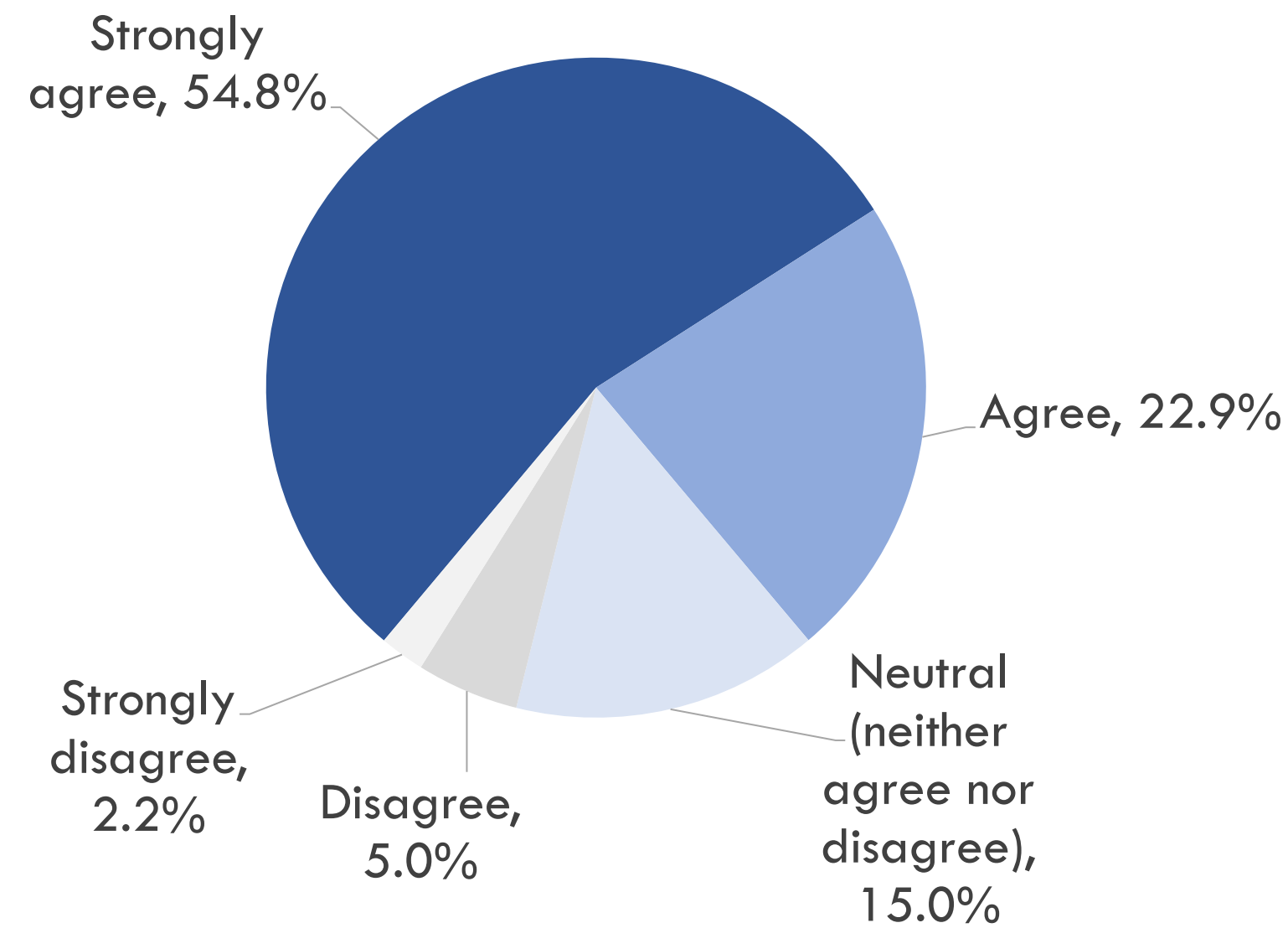
## Historical data



# Avoiding International Travel

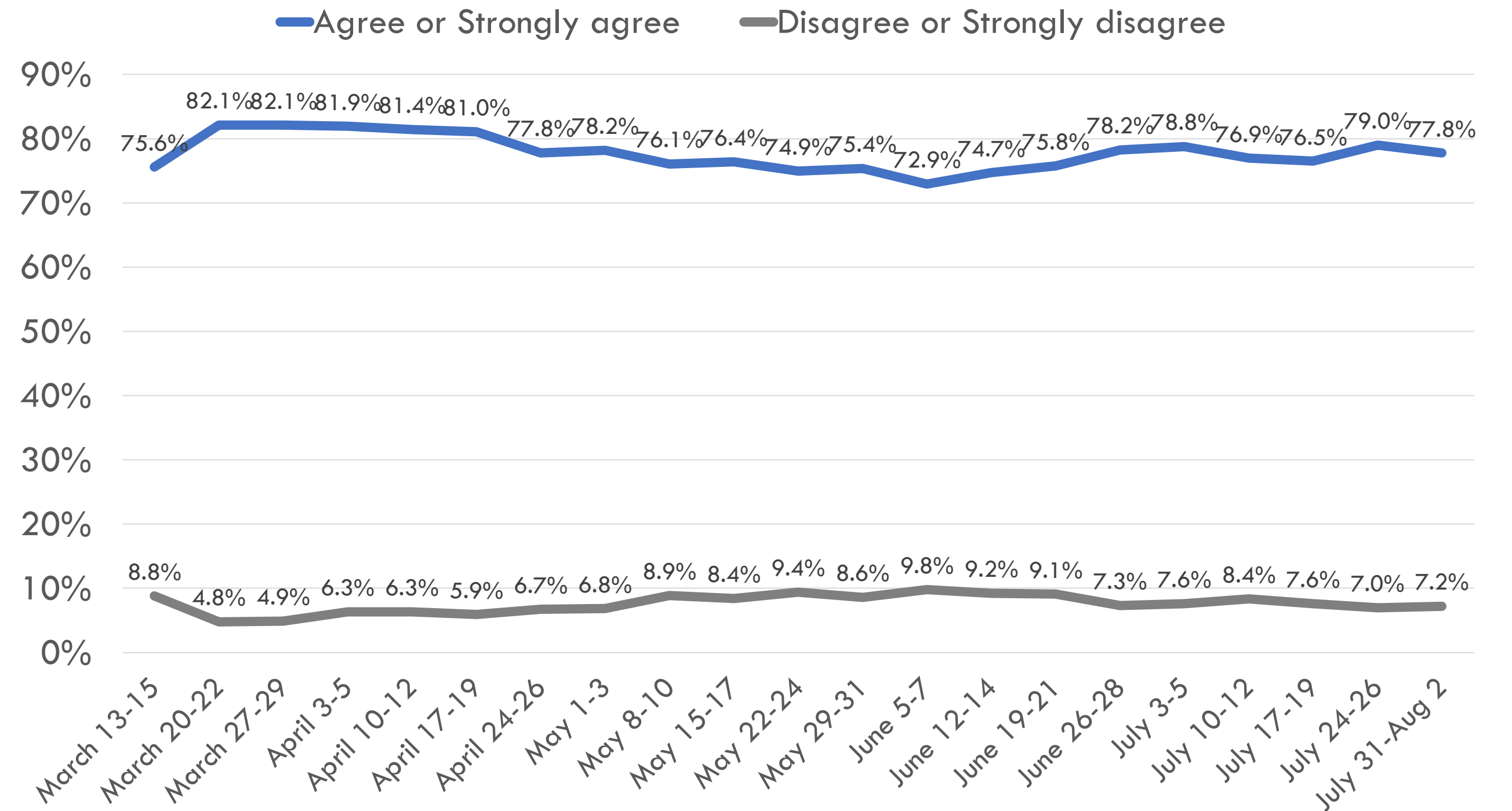
**How much do you agree with the following statement?**

**Statement:** I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

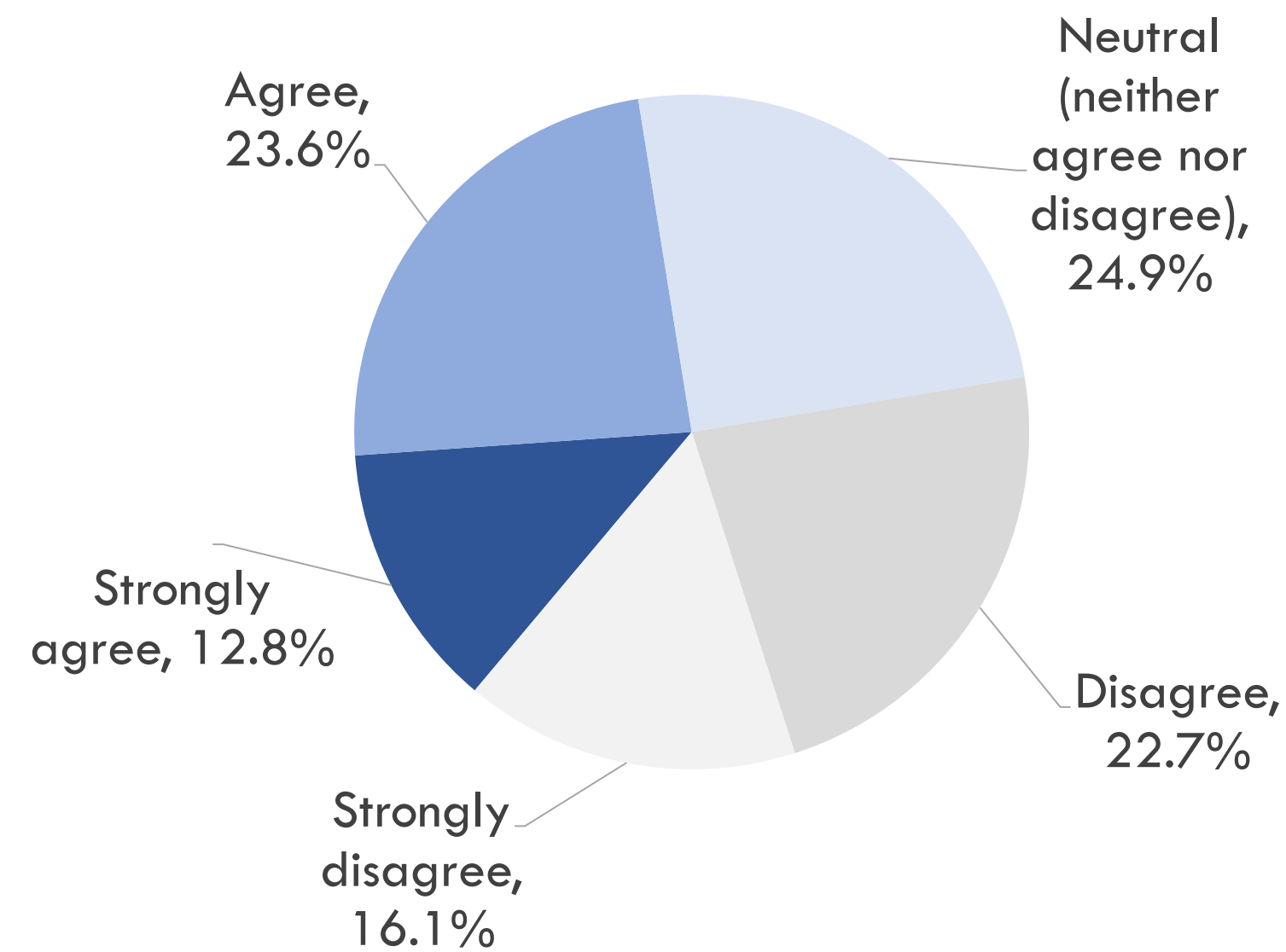
## Historical data



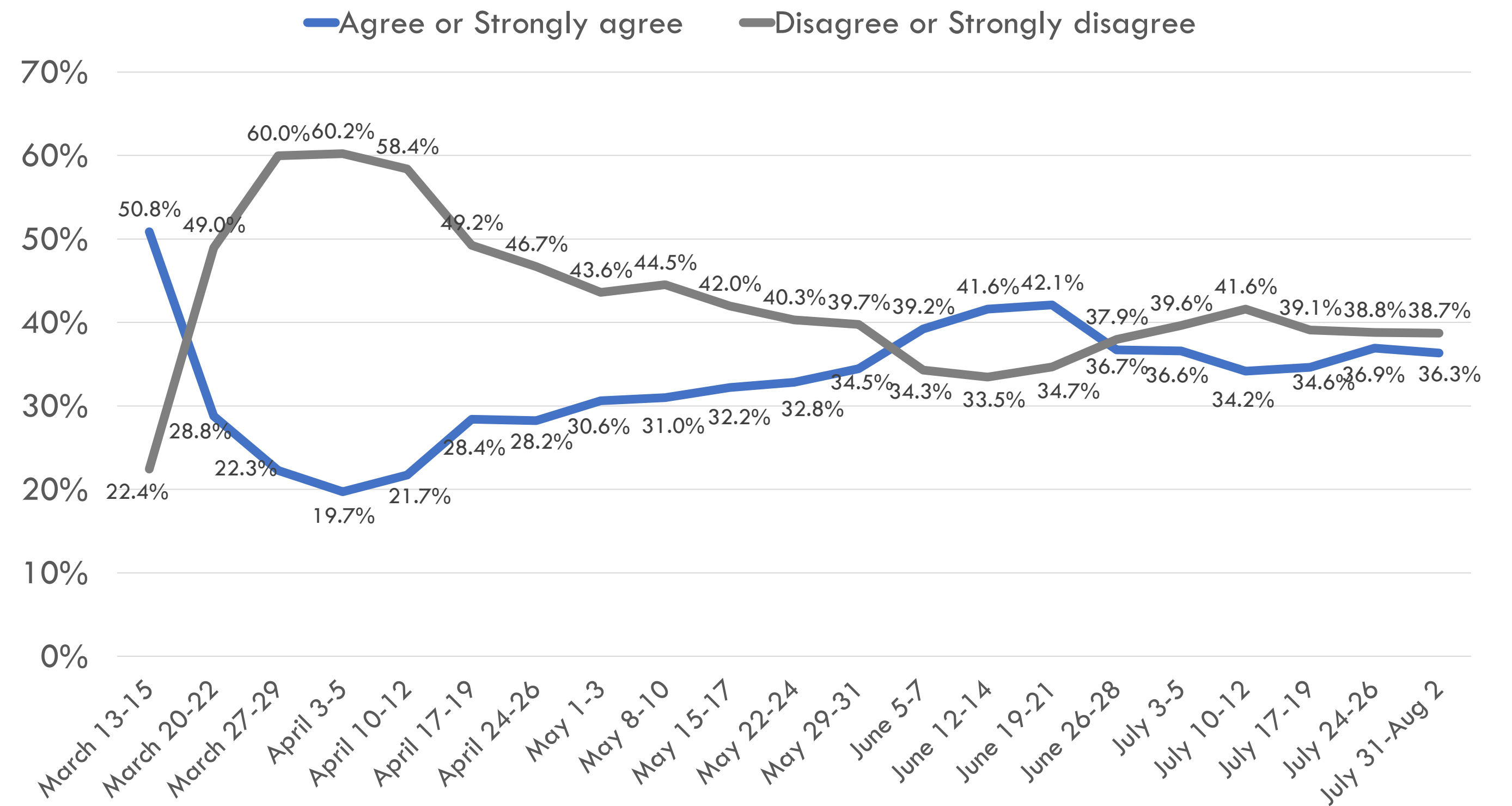
# Comfort Enjoying Home Community

**How much do you agree with the following statement?**

**Statement:** I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.



## Historical data

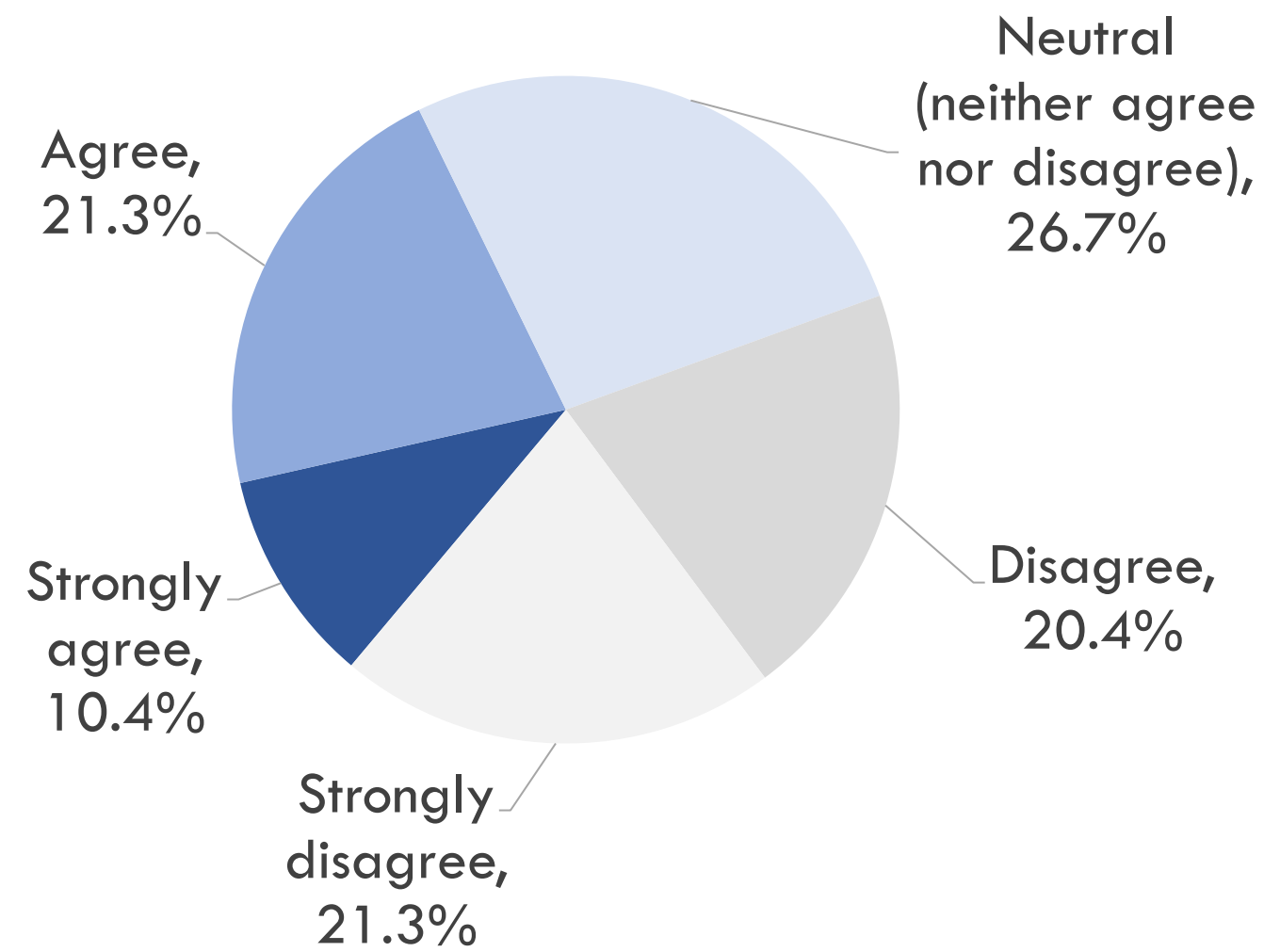


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

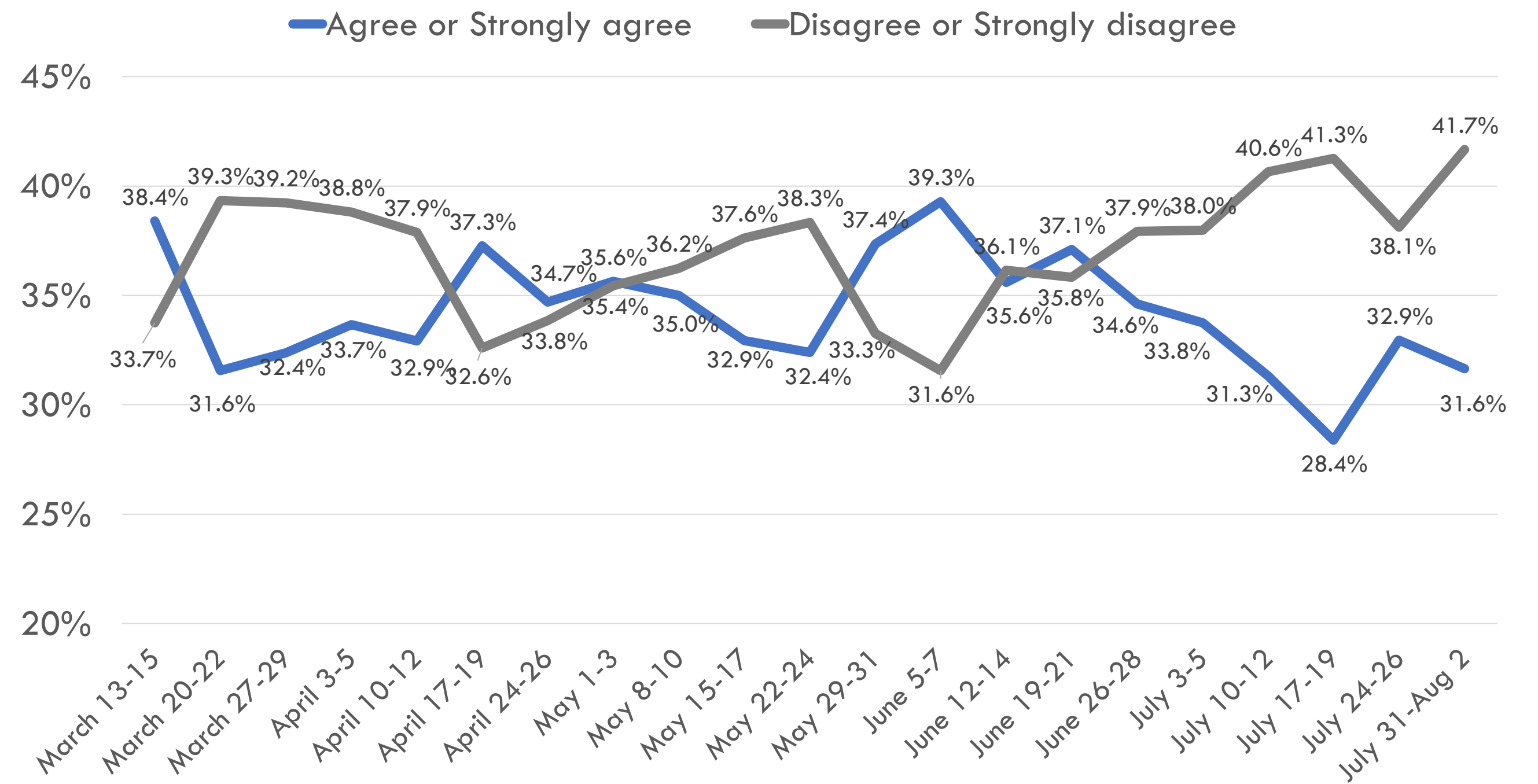
# Discounts and Price Cuts

**How much do you agree with the following statement?**

**Statement:** The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.



## Historical data

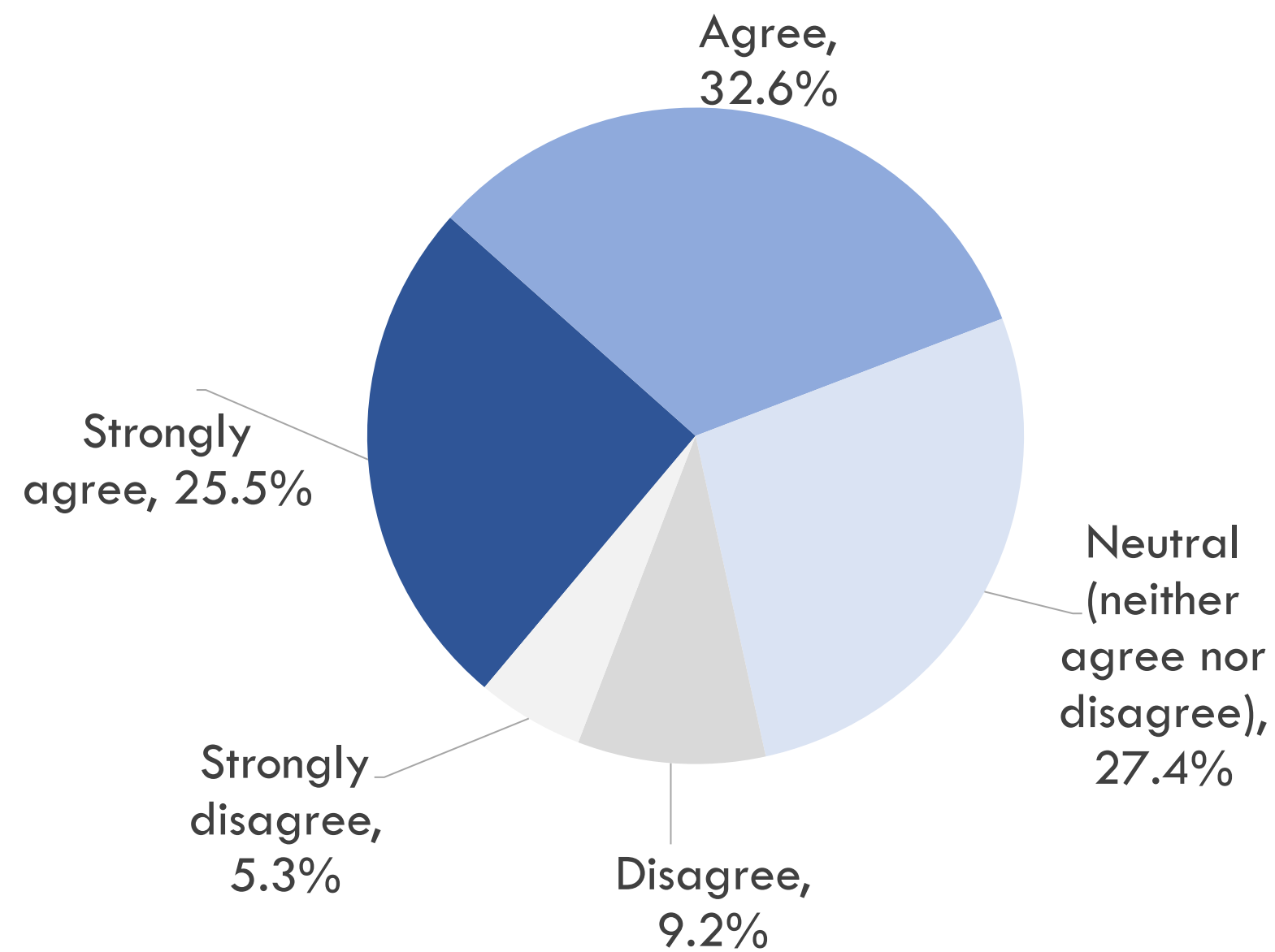


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

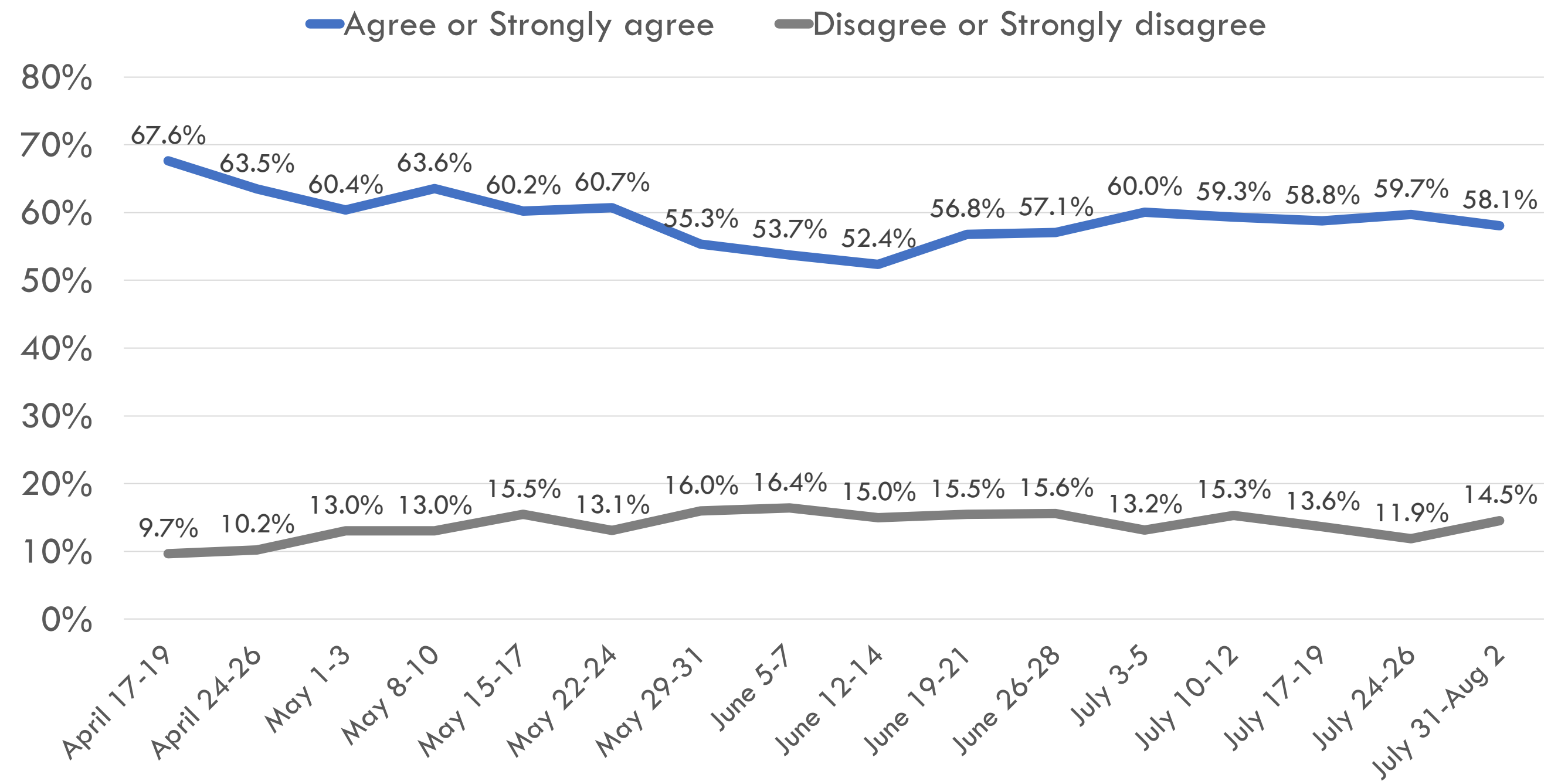
# Travelers in Community are Unwanted

**How much do you agree with the following statement?**

**Statement:** I do not want travelers coming to visit my community right now.



## Historical data

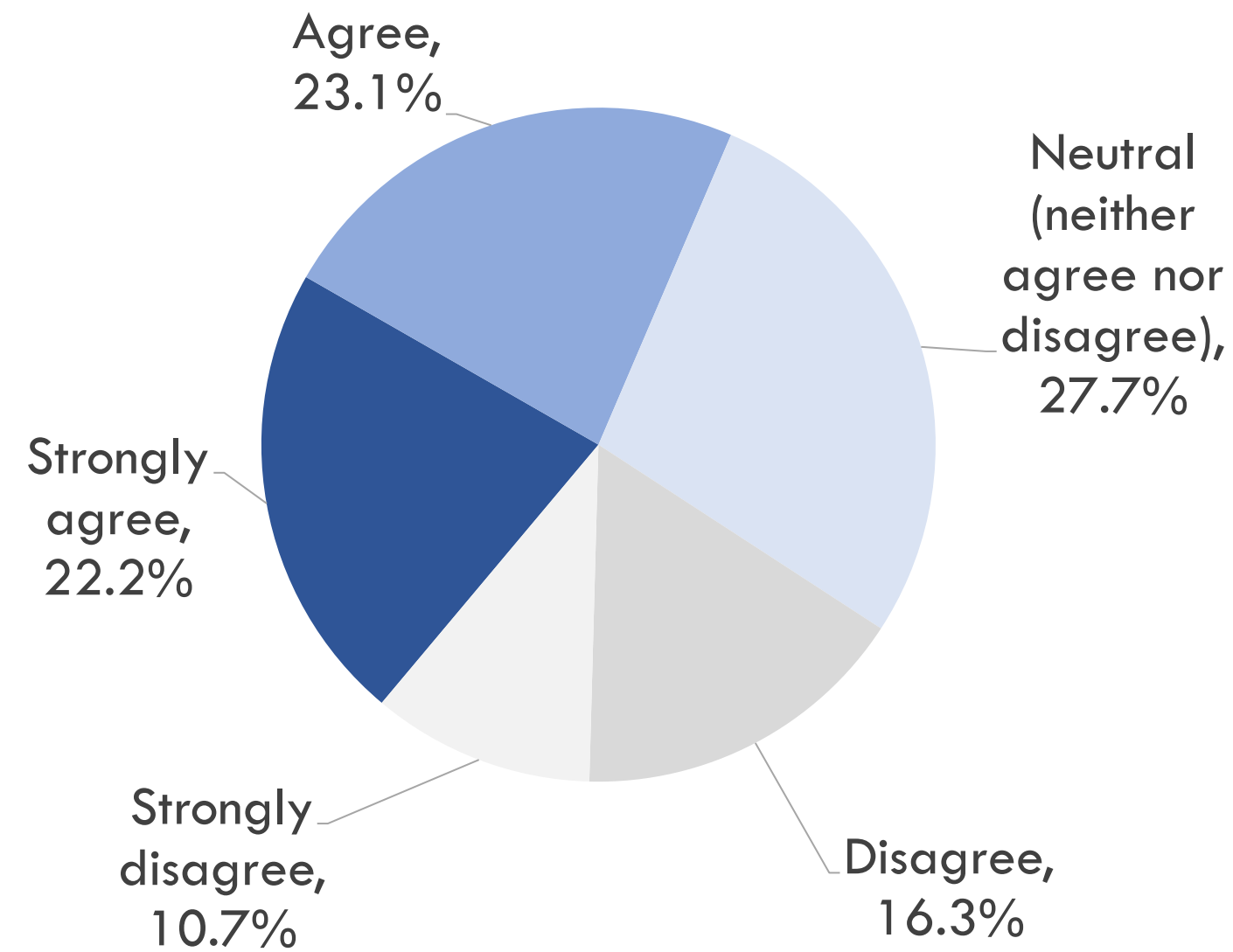


(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)

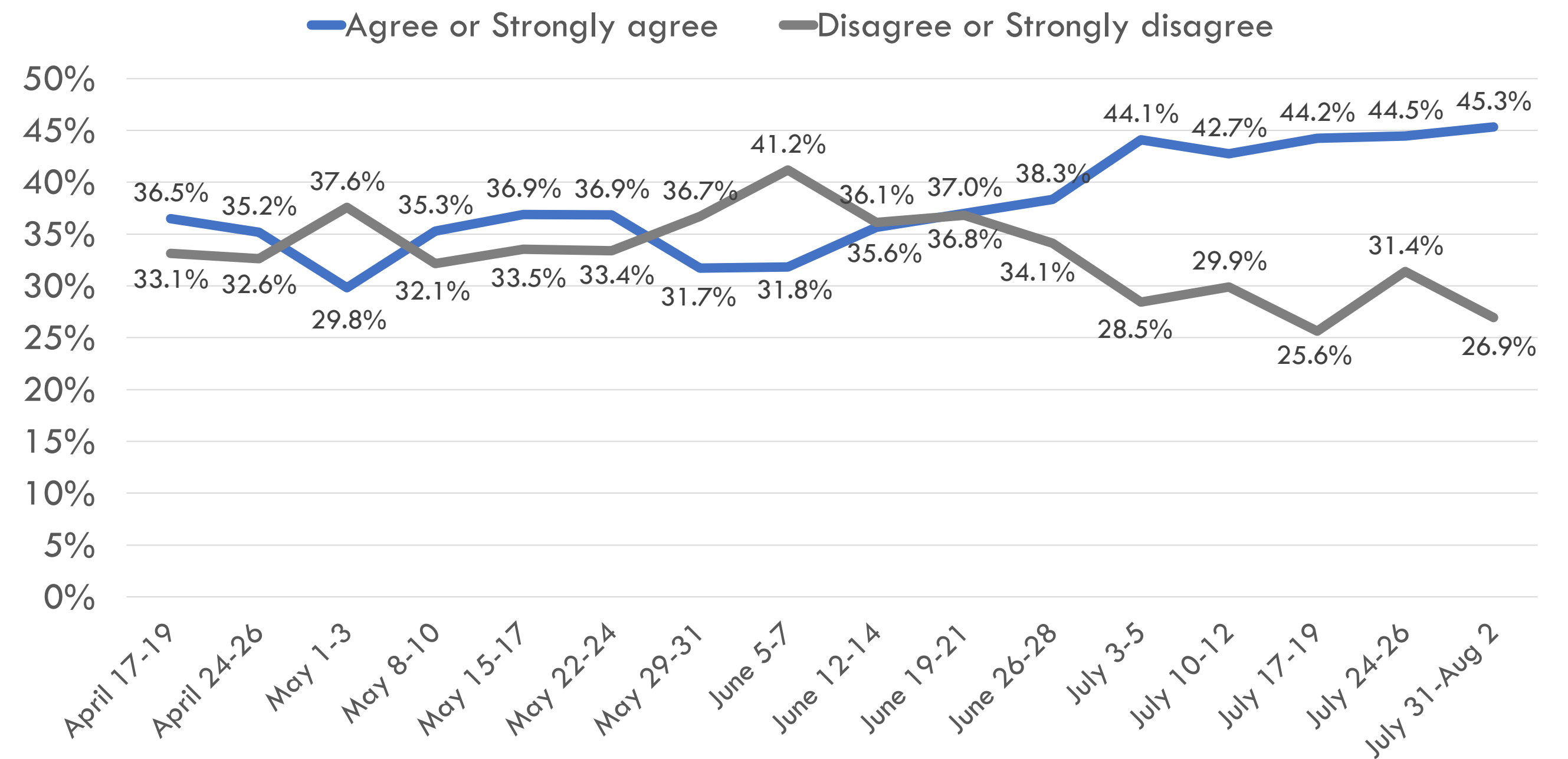
# Won't Travel Without Vaccine

**How much do you agree with the following statement?**

**Statement:** I'm not traveling until there is a vaccine.



## Historical data



(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206 and 1,224 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26 and 31-August 2, 2020)



# Coronavirus Travel Sentiment Index

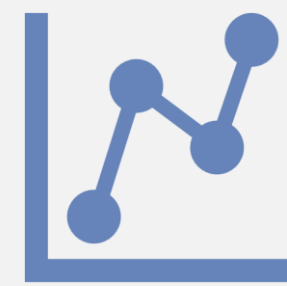
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 3rd

# What is a Predictive Index?



Indexing is the practice of compiling data into one single metric.



A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.

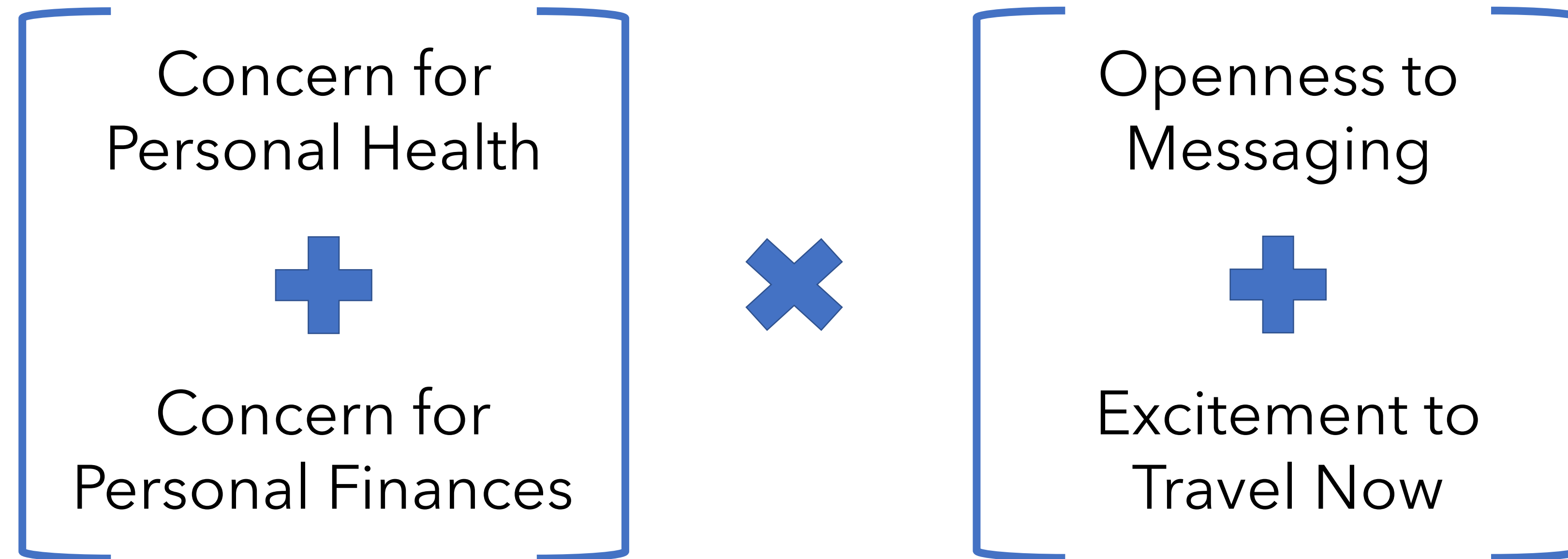


The goals are to identify:

- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

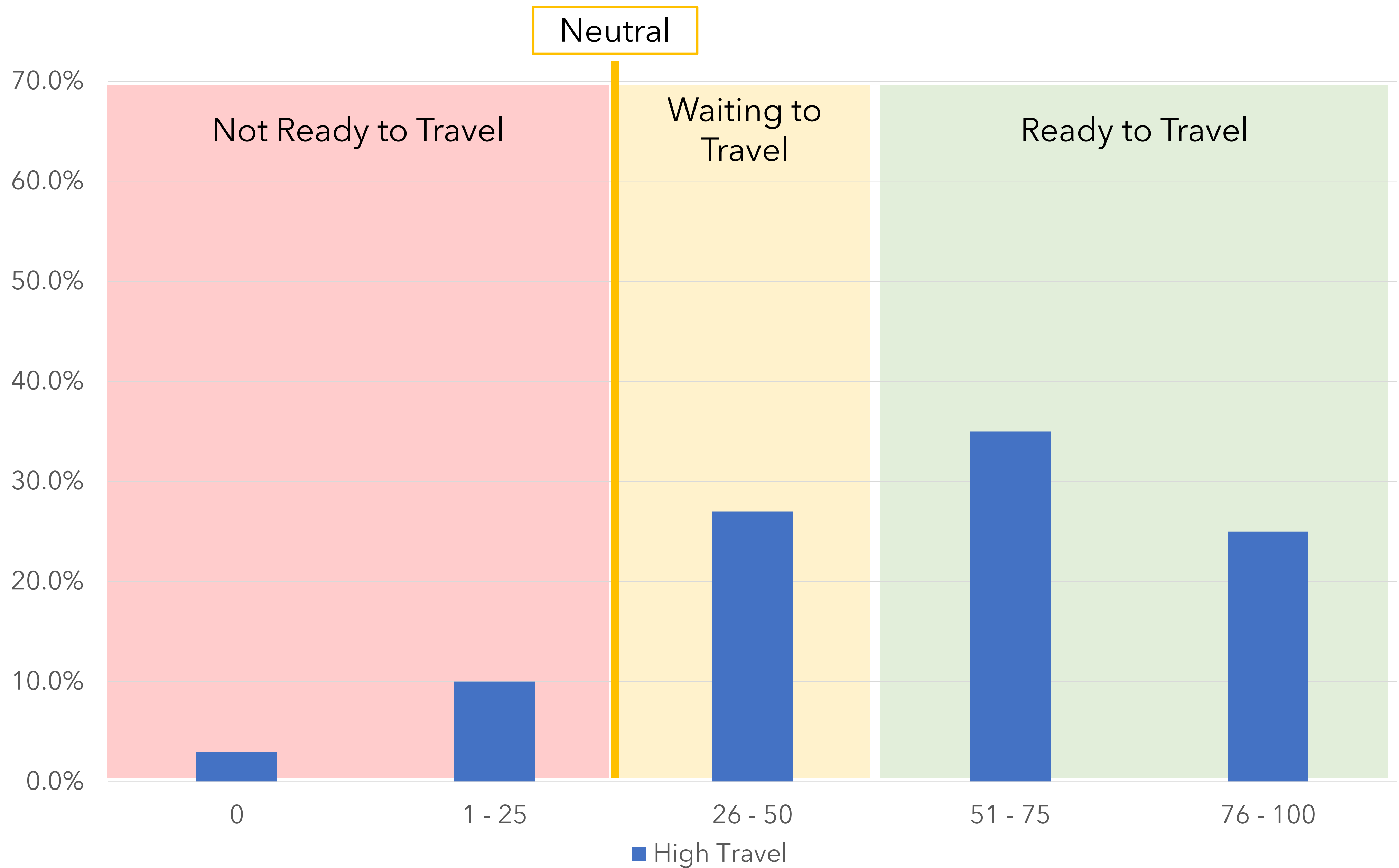


# Predictive Index Formula



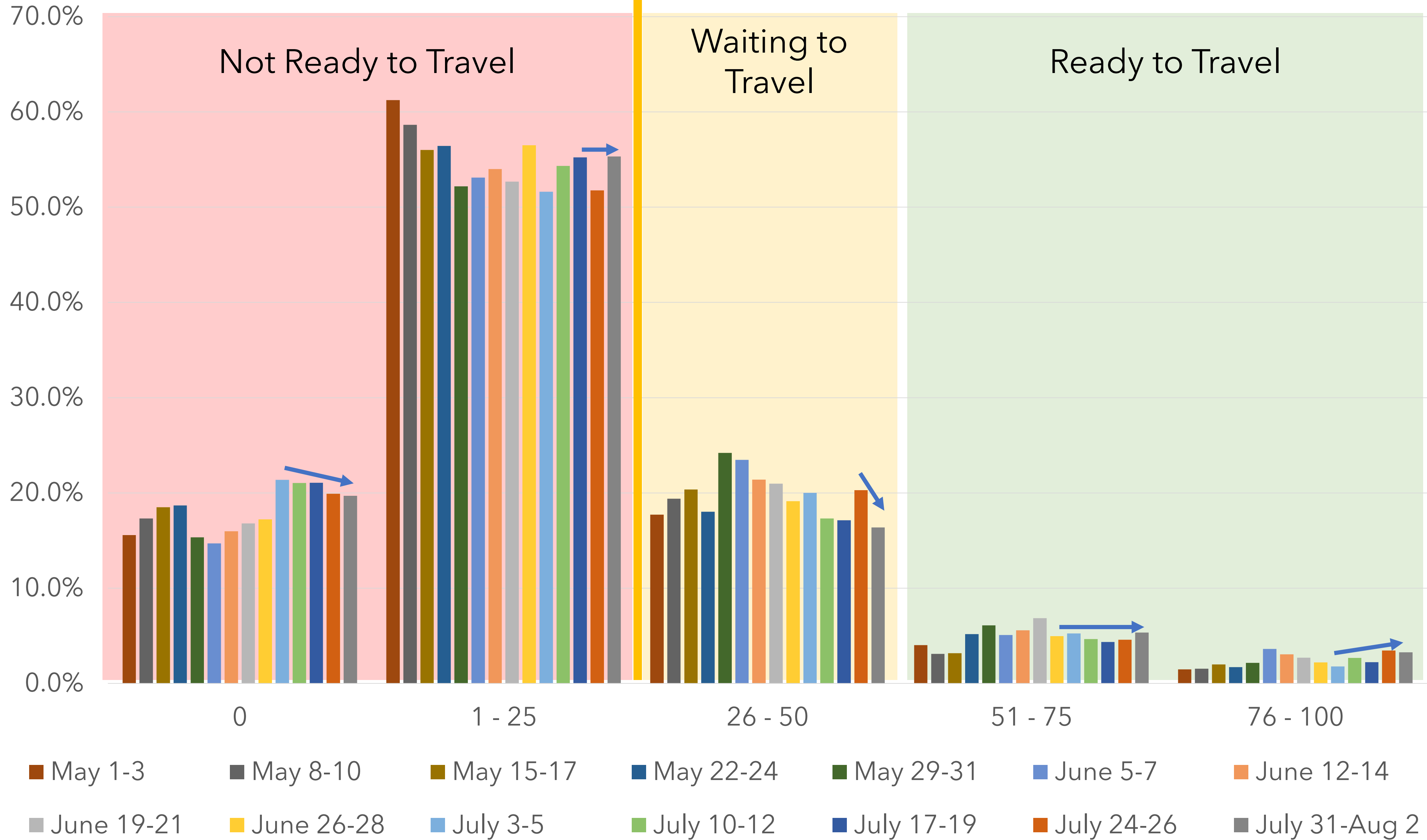
\*Normalized to a 100pt scale

# Healthy Travel Outlook



# Travel Outlook

Neutral

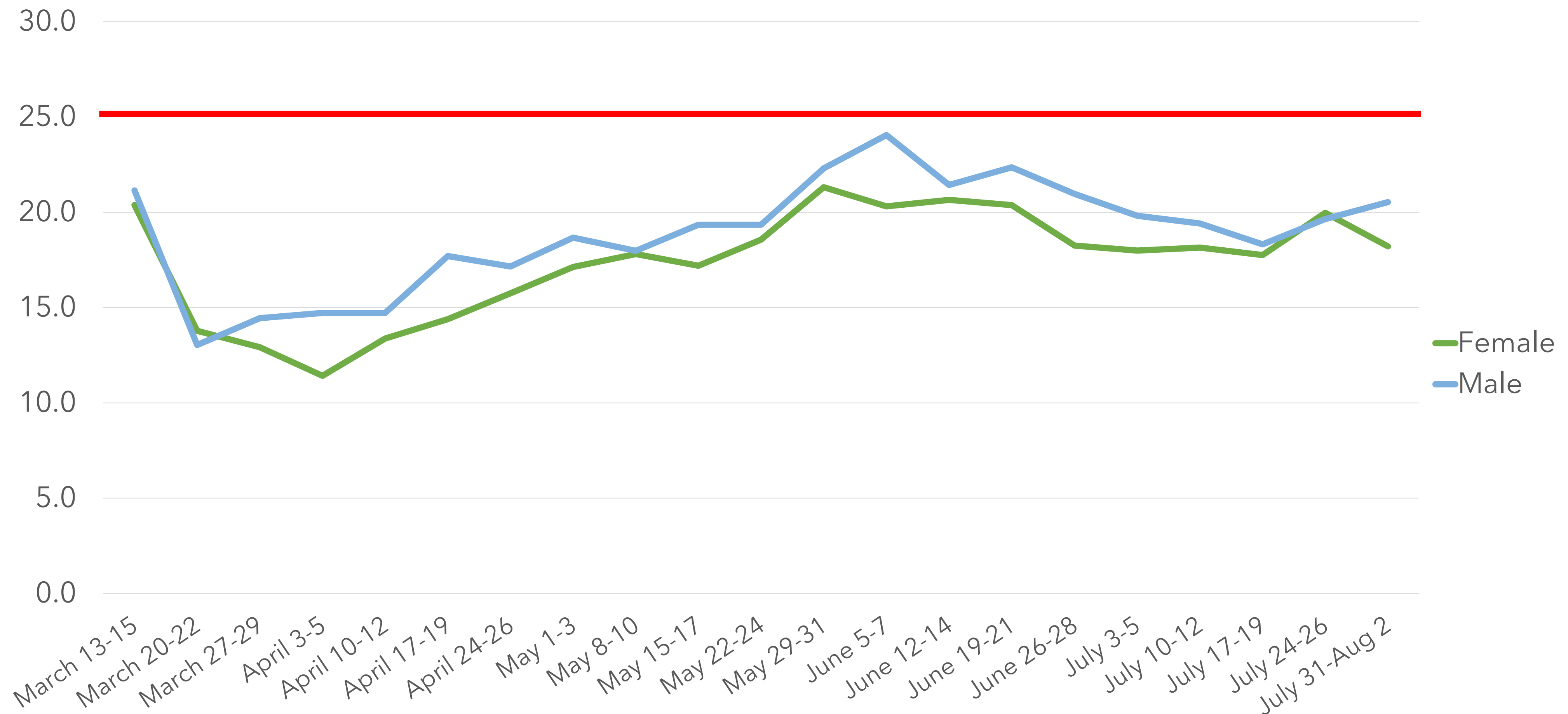




# Gender

## Points of Interest:

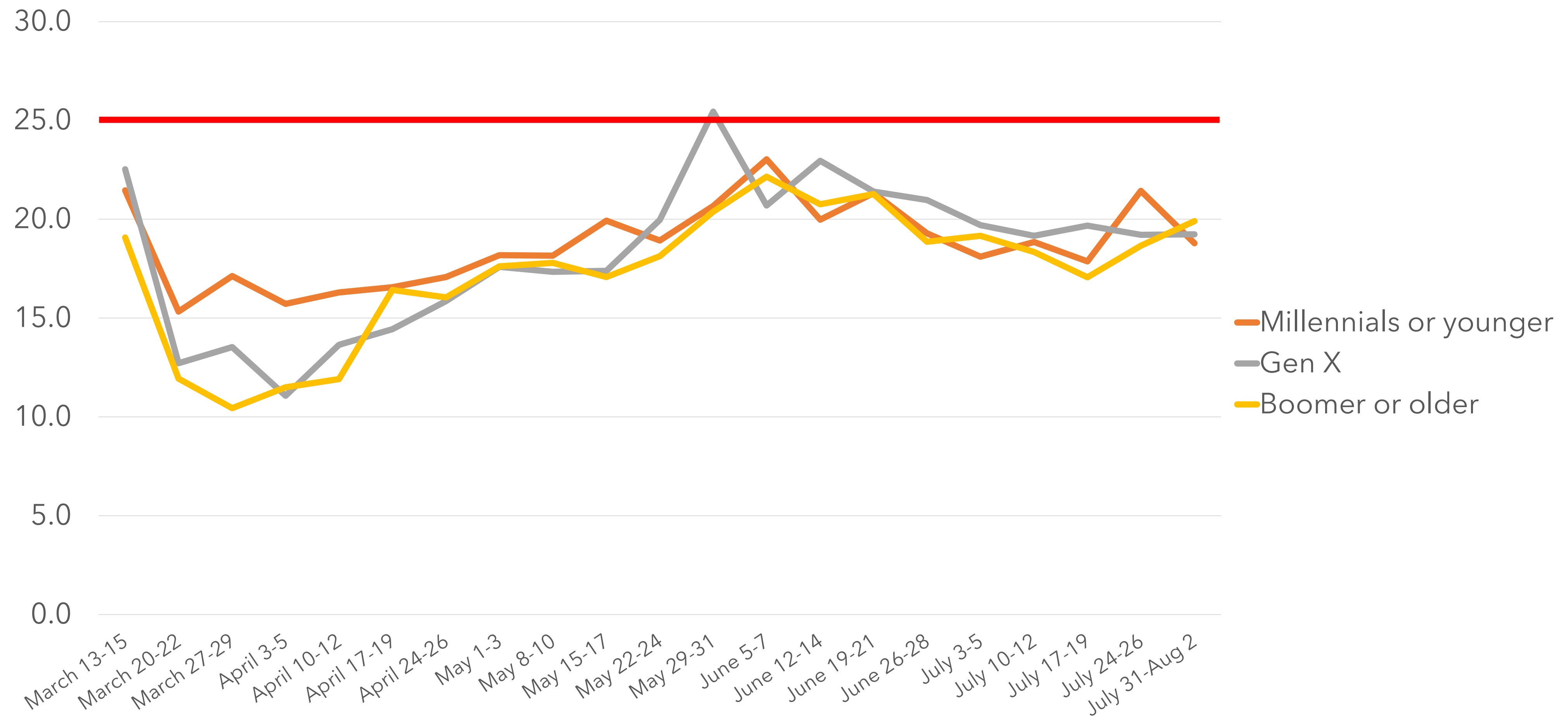
- Men reported increased sentiment this week while sentiment for Women decreased slightly.
- Safety concerns decreased for Men this week.
- This week 54.9 percent of Women reported they have no plans to travel in 2020 (up from 47.2% last week).
- About a quarter of Men this week (24.0%) said they are already traveling or ready to travel with no hesitations.



# Generation

## Points of Interest:

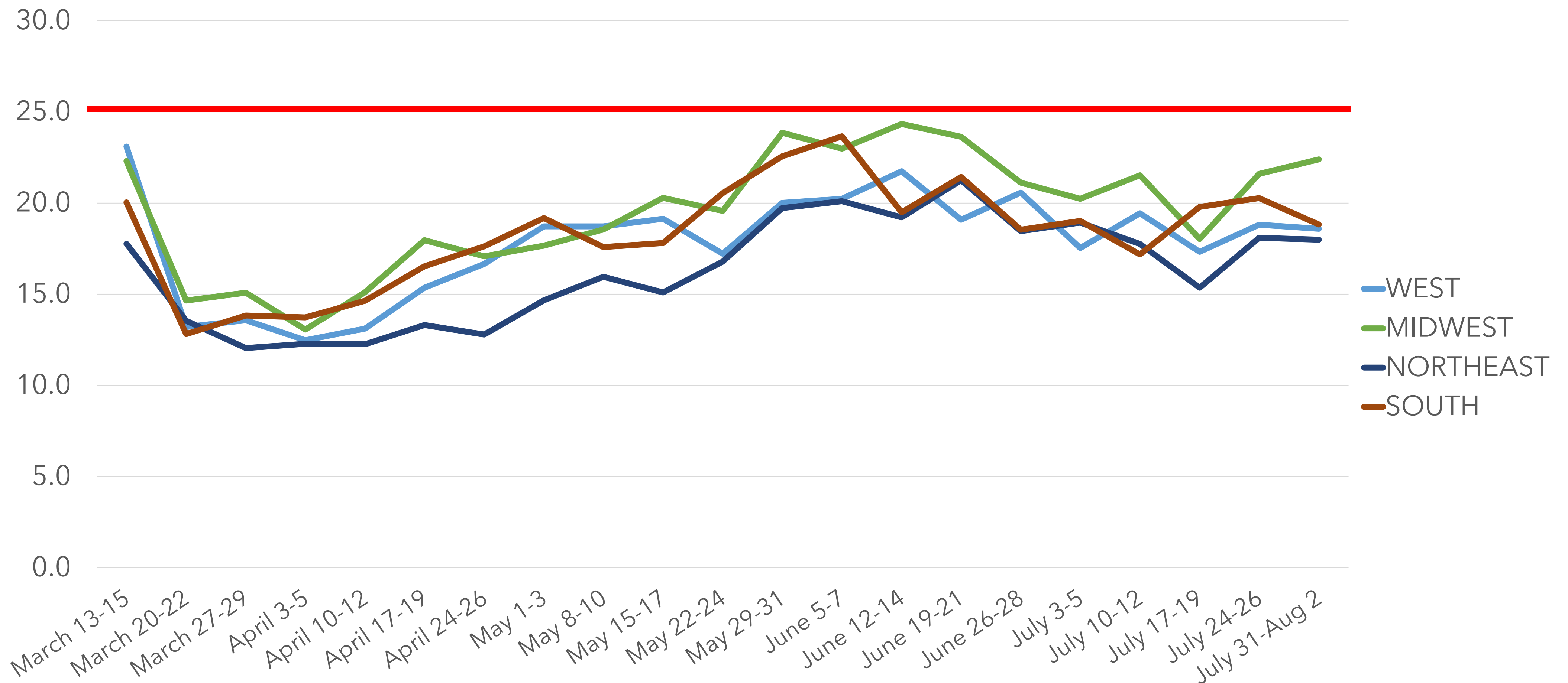
- Boomers showed increased sentiment for two consecutive weeks, in contrast to other generations.
- Boomers showed a decrease in safety concerns again this week.
- Over a third of Millennials (32.7%) reported they would be Happy or Very happy to see an ad promoting their community for travel.



# US Region

## Points of Interest:

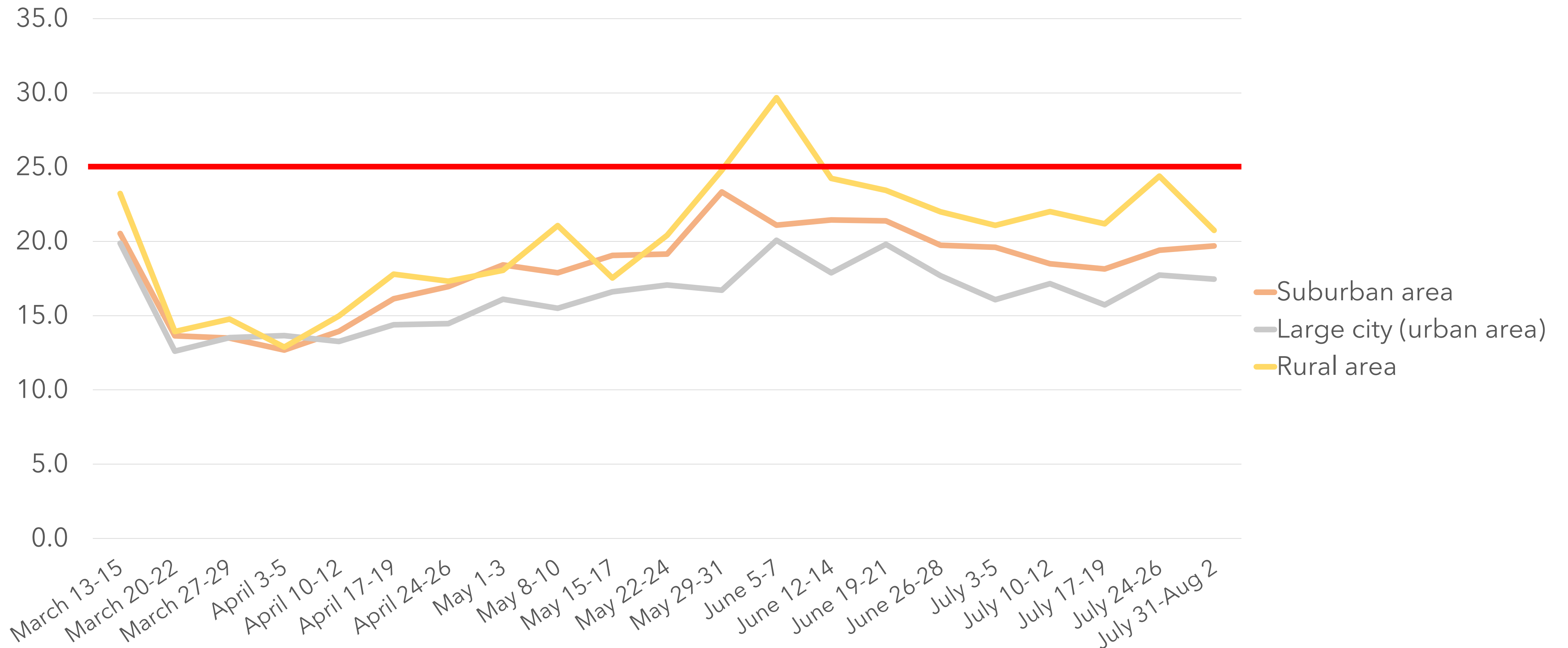
- The Midwest indexed highest amongst US regions this week and is the only region to show any sentiment growth this week.
- The Midwest and West regions showed slight decreases in safety concerns this week.
- The Midwest region showed more excitement for travel and openness for travel messaging again this week than the other US regions.



# Type Of Residence

## Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts, but at a smaller margin this week.
- Rural respondents reported increased safety concerns this week, while both Urban and Suburban respondents showed decreased levels of safety concern.
- Large city Urban respondents were the most likely to be satisfied by how their communities were behaving during the pandemic.

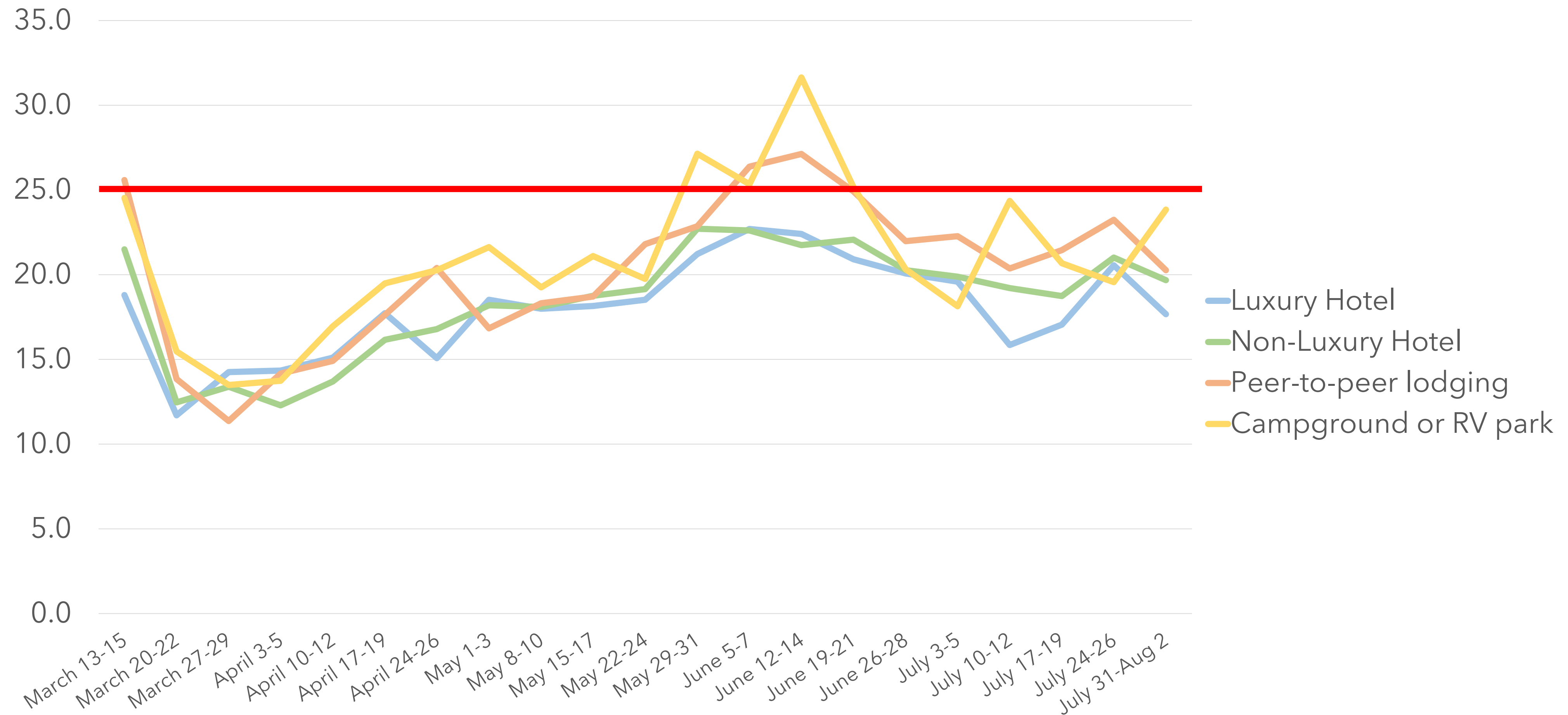




# Lodging Type Used in last 2 years

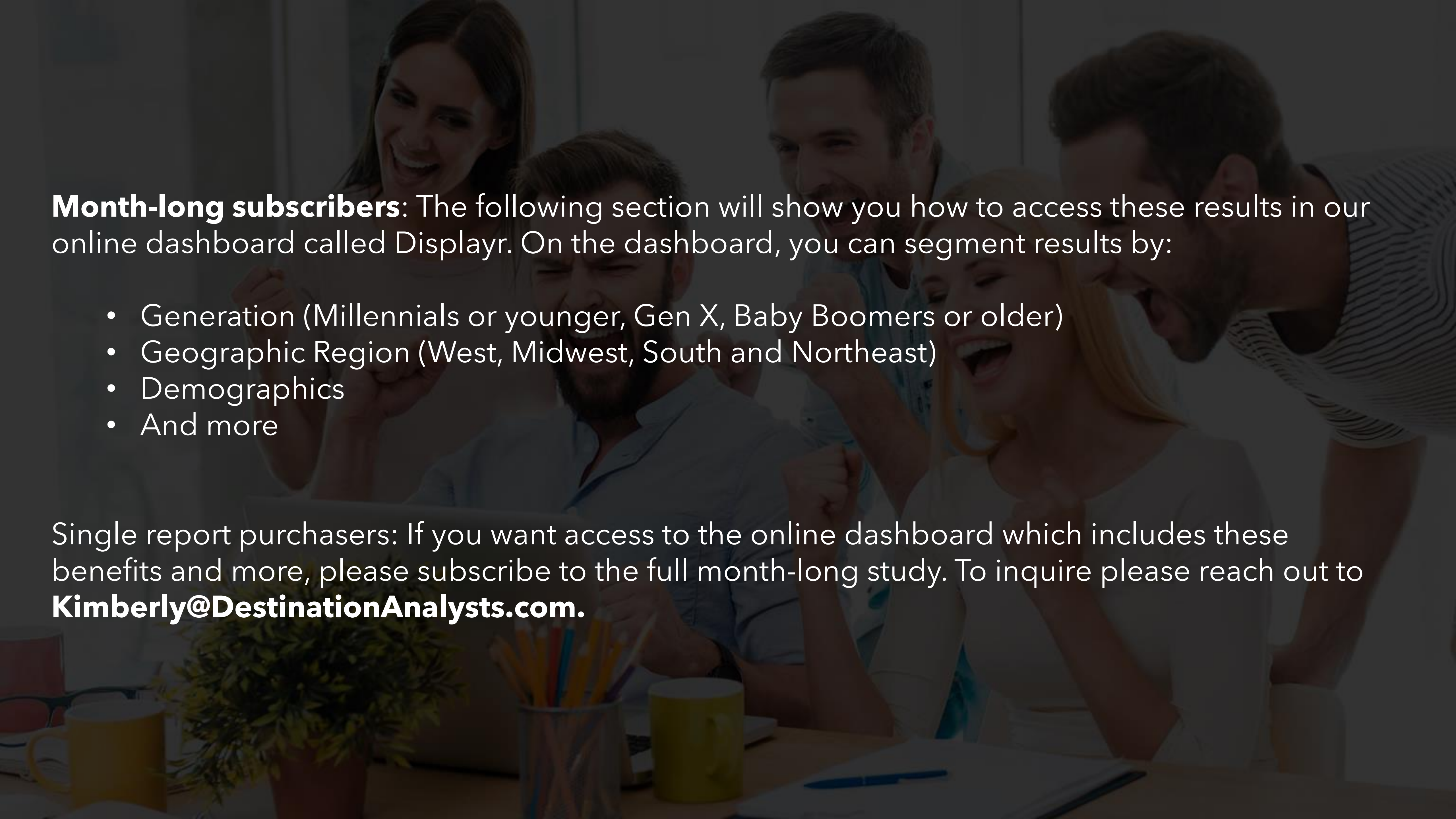
## Points of Interest:

- Campground respondents indexed highest amongst lodging types this week.
- Luxury hotel and Peer-to-Peer lodging respondents reported increased safety concerns this week.
- Luxury hotel and Peer-to-Peer lodging respondents reported the highest levels of happiness if a destination required face masks in public.





# Data Tables



**Month-long subscribers:** The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

- Generation (Millennials or younger, Gen X, Baby Boomers or older)
- Geographic Region (West, Midwest, South and Northeast)
- Demographics
- And more

Single report purchasers: If you want access to the online dashboard which includes these benefits and more, please subscribe to the full month-long study. To inquire please reach out to **Kimberly@DestinationAnalysts.com.**

# HOW TO USE DISPLYR

Guidelines on viewing, segmenting  
and exporting data from the  
dashboard.

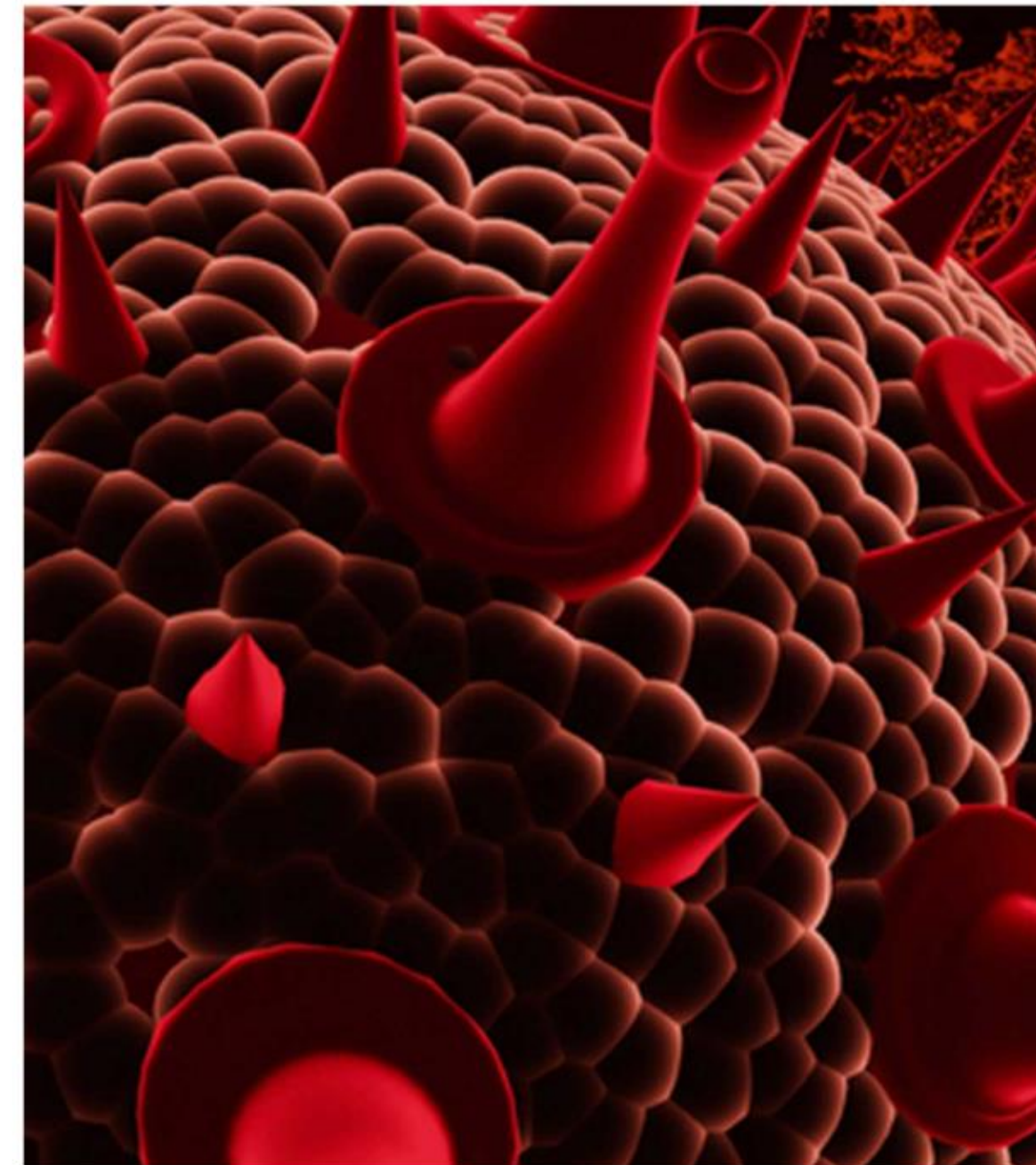


# NAVIGATING THE DASHBOARD:

Toggle between the report sections by clicking on the header(s) in this navigation pane

## Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



Search...

Filters ▾ Export ▾ ?

- 65% +

## Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

# NAVIGATING THE REPORT:

To view submenu data points in a particular section, click on the arrow to the left of the heading.

This allows you to jump to specific data points without having to scroll through the entire report.

## Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations
  - Anticipated Change in Coronavirus S
  - Anticipated Change in Coronavirus S
  - Perceived Safety of Travel Activities
  - Perceived Safety of Travel Activities -
  - Avoiding Travel Until the Crisis Blow:
  - Avoiding Travel Until the Crisis Blow:
  - Expectations for Summer Travel Sea
  - Expectations for Summer Travel Sea
  - Staycations as a Replacement for Va
  - Staycations as a Replacement for Va
  - Road Trips as a Replacement for Air
  - Road Trips as a Replacement for Air
  - Regional Trips as a Replacement for
  - Regional Trips as a Replacement for
  - Avoiding Conferences or Conventior
  - Avoiding Conferences or Conventior
  - Avoiding International Travel
  - Avoiding International Travel - Break
  - Comfort Enjoying Home Community
  - Comfort Enjoying Home Community
  - Discounts Drive Interest in Travel
  - Discounts Drive Interest in Travel - B
  - Upcoming Travel Plans



# FILTERING THE REPORT:

To segment the results by a specific group (generational, geographical, etc.)  
Click on "Filters" in the top right corner.



**Question:** Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus?  
**Base:** Millennial or younger 629 responses.

**IMPORTANT NOTE:** When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

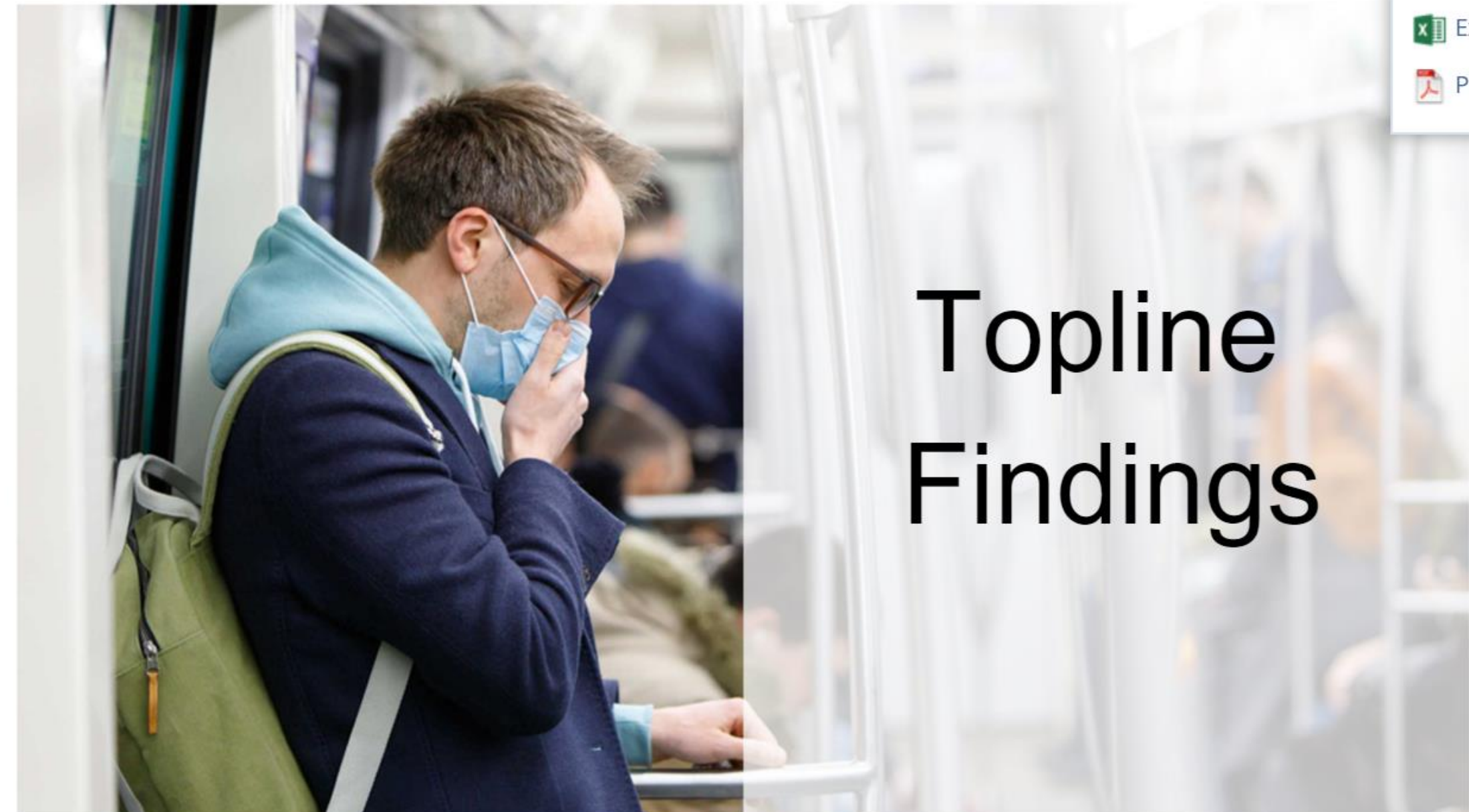
# EXPORTING THE DATA:

To share the results with others in your organization, click on "Export" in the top right corner and select your preferred file type (PowerPoint, Excel or PDF).

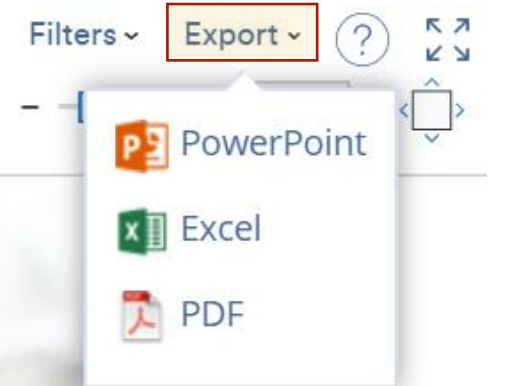
If you want to export a specific report section, be sure to select it in the navigation pane BEFORE you click "Export"

## Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
  - Concerned Personally
  - Concerned Personally - Breakout
  - Concerned for Friends/Family
  - Concerned for Friends/Family - Breakout
  - Concerned for Personal Finances
  - Concerned for Personal Finances - Breakout
  - Concerned for National Economy
  - Concerned for National Economy - Breakout
  - Destinations Associated with Coronavirus
  - Travel Affected by Coronavirus
  - How Travel Was Affected by Coronavirus
  - How Travel Was Affected by Coronavirus - Breakout
  - Why Travel Was Affected by Coronavirus
  - Why Travel Was Affected by Coronavirus - Breakout
  - Number of Trips Cancelled/Postponed
  - Number of Trips Cancelled - Breakout
  - Number of Trips Postponed - Breakout
  - Month of Trips Cancelled
  - Month of Trips Cancelled - Breakout
  - Refunds for Cancelled Reservations
  - Rescheduled Postponed Trips
  - Month of Rescheduled Postponed Trips
  - Month of Rescheduled Postponed Trips - Breakout
  - Type of Trips Cancelled Or Postponed



# Topline Findings



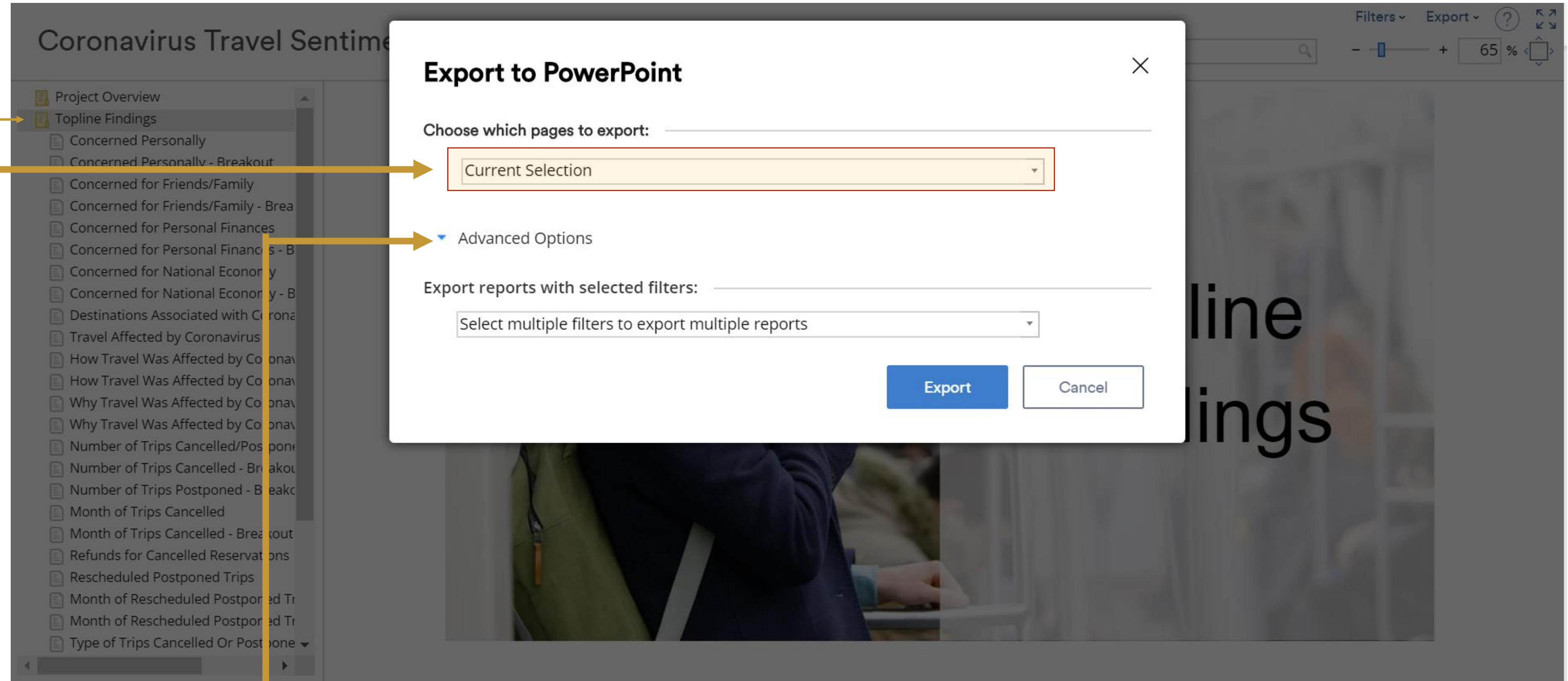


# EXPORTING THE DATA:

After selecting your preferred file type, Displayr will prompt you to select "Current Selection" or "All"

"Current Selection" will only export the single data point you are viewing (or an entire report section if it is selected in the navigation pane as shown in this screenshot).

"All" will allow you to download the entire report.



**IMPORTANT NOTE:** Use the "Advanced Options" to apply specific filters to the data you want to export.

# NEED MORE HELP?

If you have any additional questions about using Displayr please reach out to our dashboard expert:

**Chingun Ganzorig**

**Research Manager**

**[Chingun@DestinationAnalysts.com](mailto:Chingun@DestinationAnalysts.com)**

**(415) 722-2503**

