



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**PRESENTATION OF FINDINGS
WEEK OF AUGUST 17TH, 2020**

Destination  Analysts



Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI and economic analysis.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Resident + Stakeholder Research

Advertising Testing

Grant Support

info@destinationanalysts.com



RESEARCH OVERVIEW & METHODOLOGY

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 23 data (fielded August 14th-16th) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S. Regions





IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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purchasing, subscribing or donating
to support this ongoing research**

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Supporter Benefits

- Access to online dashboard with full 22-weeks of data and numerous segment filters
- Complete report(s) of findings
- Destination specific insights
- Presentation to Board of Directors or other meeting/event





Cases in the U.S.

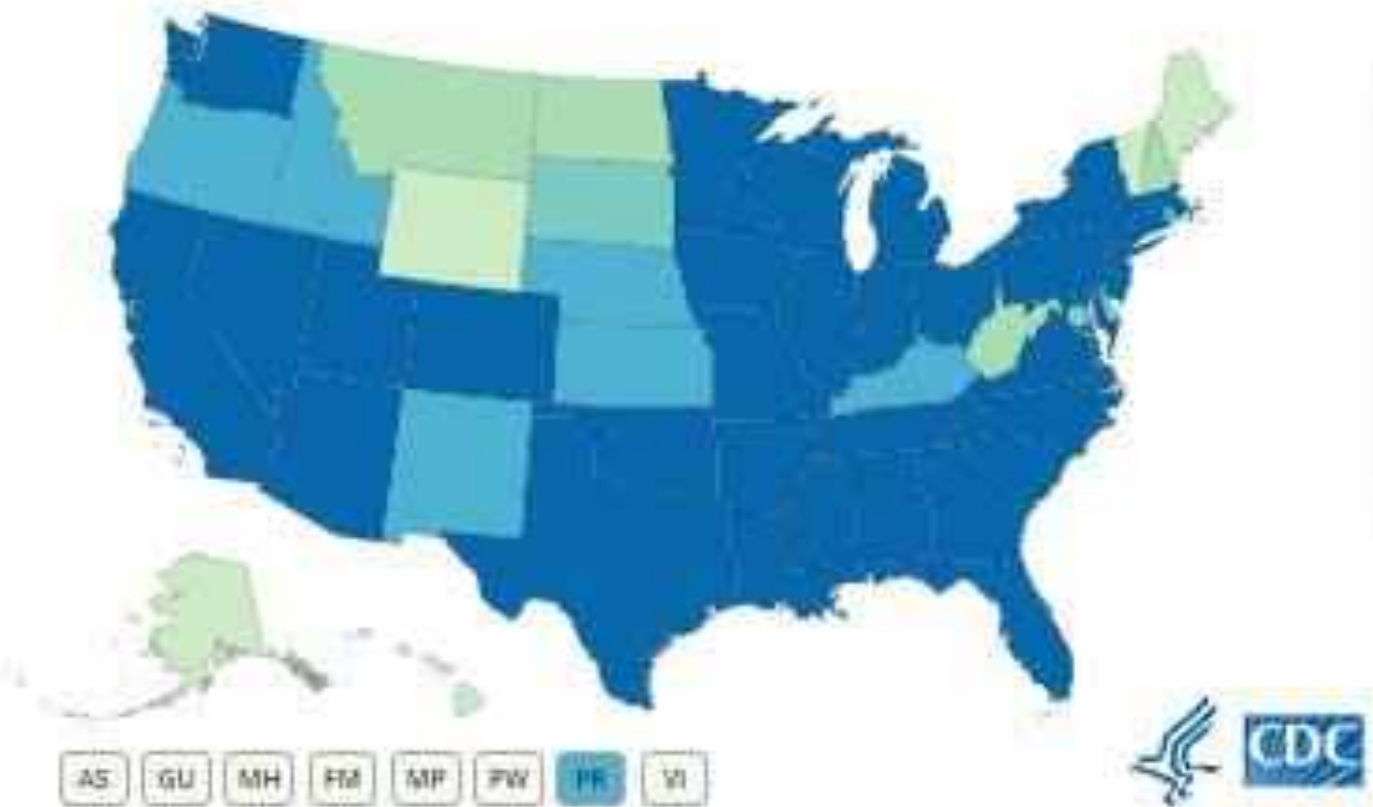
Updated August 15, 2020

Languages [Print](#)



Cases by Jurisdiction

This map shows COVID-19 cases reported by U.S. states, the District of Columbia, New York City, and other U.S.-affiliated jurisdictions. Hover over the maps to see the number of cases reported in each jurisdiction. To go to a jurisdiction's health department website, click on the jurisdiction on the map.



TRAVEL

Judge dismisses lawsuit claiming New York quarantine rules infringed on 'right to travel'

Associated Press

Published 10:57 a.m. ET Aug. 15, 2020



New York Gov. Cuomo says schools can reopen for in-person classes

New York was once the epicenter of the coronavirus outbreak in the U.S., but Gov. Andrew Cuomo says infection rates are among lowest in the nation. USA TODAY

UTICA, N.Y. — A federal judge threw out a lawsuit by an Arizona woman who claimed [New York's 14-day quarantine requirement](#) for travelers from hotspot coronavirus states infringed on her "fundamental right to travel."

U.S. District Court Judge David Hurd on Tuesday became at least the second federal judge to rule against challenges to the quarantines first ordered by [Gov. Andrew Cuomo in June](#). The advisory currently covers travelers from 31 states, [Puerto Rico and the Virgin Islands](#).

Cynthia Page filed the suit last month, claiming it unfairly stopped her from visiting Brooklyn and helping friends pack up belongings in a house they were preparing to sell. Page asserted that Cuomo's executive order and the quarantine rules made the trip impossible, which "was and continues to be very upsetting," according to court papers.

Advertisement

MICHIGAN

Canadian travel ban extended another month as US continues to wrestle pandemic

Frank Witsil Detroit Free Press

Published 12:58 p.m. ET Aug. 14, 2020 | Updated 6:57 p.m. ET Aug. 14, 2020



A sign on the Southbound Lodge Freeway reminds people about the entry restrictions to Canada on March 24, 2020. Eric Seale, Detroit Free Press

Border closures to Canada and Mexico were extended Friday for at least another month as a precaution aimed at containing the spread of the coronavirus.

As with previous bans, limits on nonessential travel do not cover trade or air travel.

"We continue to work with our Canadian and Mexican partners to slow the spread of #COVID19," tweeted Department of Homeland Security Acting Secretary Chad Wolf. "Accordingly, we have agreed to extend the limitation of nonessential travel at our shared land ports of entry through September 21."

[The restrictions initially were announced in mid-March and were extended in April, May, June and July.](#)

Last month, the extension came amid a surge of infections in the United States. Florida, for example, reported 75,291 new cases in just seven days. All of Canada has reported 1,895 new cases during the same period.

Read more:

[Complaint: Detroit judge sexually taunted prosecutors: 'You want foreplay?'](#)

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MICHIGAN BUSINESS

Markets are lifted by vaccine news but stimulus hopes wane

Benzinga

Published 7:00 a.m. ET Aug. 15, 2020

[View Comments](#)



The S&P 500 logged another strong week last week, nearly returning to its pre-pandemic all-time highs.

Coronavirus vaccines were once again a catalyst for the market last week. On Tuesday, Russian President Vladimir Putin said Russia has registered the world's first coronavirus vaccine. On Wednesday, the U.S. government announced a deal with Moderna to purchase 100 million doses of the company's experimental coronavirus vaccine for \$1.53 billion.

The battle over a second major economic stimulus package continued without resolution in Washington last week, with Democrats pushing a bill worth an estimated \$3 trillion and Republicans touting a bill worth about \$1 trillion.



A sign marks an entrance to a Moderna, Inc., building, Monday, May 18, 2020, in Cambridge, Mass. Moderna announced Monday, May 18, 2020, that an experimental vaccine against the coronavirus showed encouraging results in very early testing, triggering hopes for immune responses in eight healthy, middle-aged volunteers. (AP Photo/Bill Sikes) [By Sikes, AP](#)

Congress exits with no deal, leaving economists flabbergasted

BY SYLVAN LANE - 08/14/20 07:42 PM EDT



A wide range of economists are expressing exasperation that Congress would leave town without first finishing work on a new coronavirus relief package they say is critical to the country's recovery, and to millions depending on help from the government.

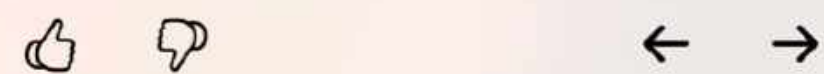
More than 28 million Americans on some form of unemployment insurance lost a crucial source of income after a \$600 weekly boost to those benefits lapsed last month.

Those households now have far less money to cover basic expenses, including rent and home payments they can no longer forgo after the expiration of federal bans on evictions and foreclosures.

“This is exactly what we’ve been warning about”: Why some school reopenings have backfired

The most important variable in reopening schools in this pandemic is community transmission.

By Lois Parshley | August 17, 2020 4:25 pm



The Washington Post

‘We’ve got to do better than this’: College students raise alarm by packing bars, avoiding masks

☰ CBS NEWS

Alabama college students’ “ongoing party” raises questions about safety – and football season

AUGUST 17, 2020 / 11:59 AM / CBS/AP

A photograph showing a group of people walking in a crowd. Many of them are wearing face masks. The scene appears to be outdoors, possibly at a public event or gathering.

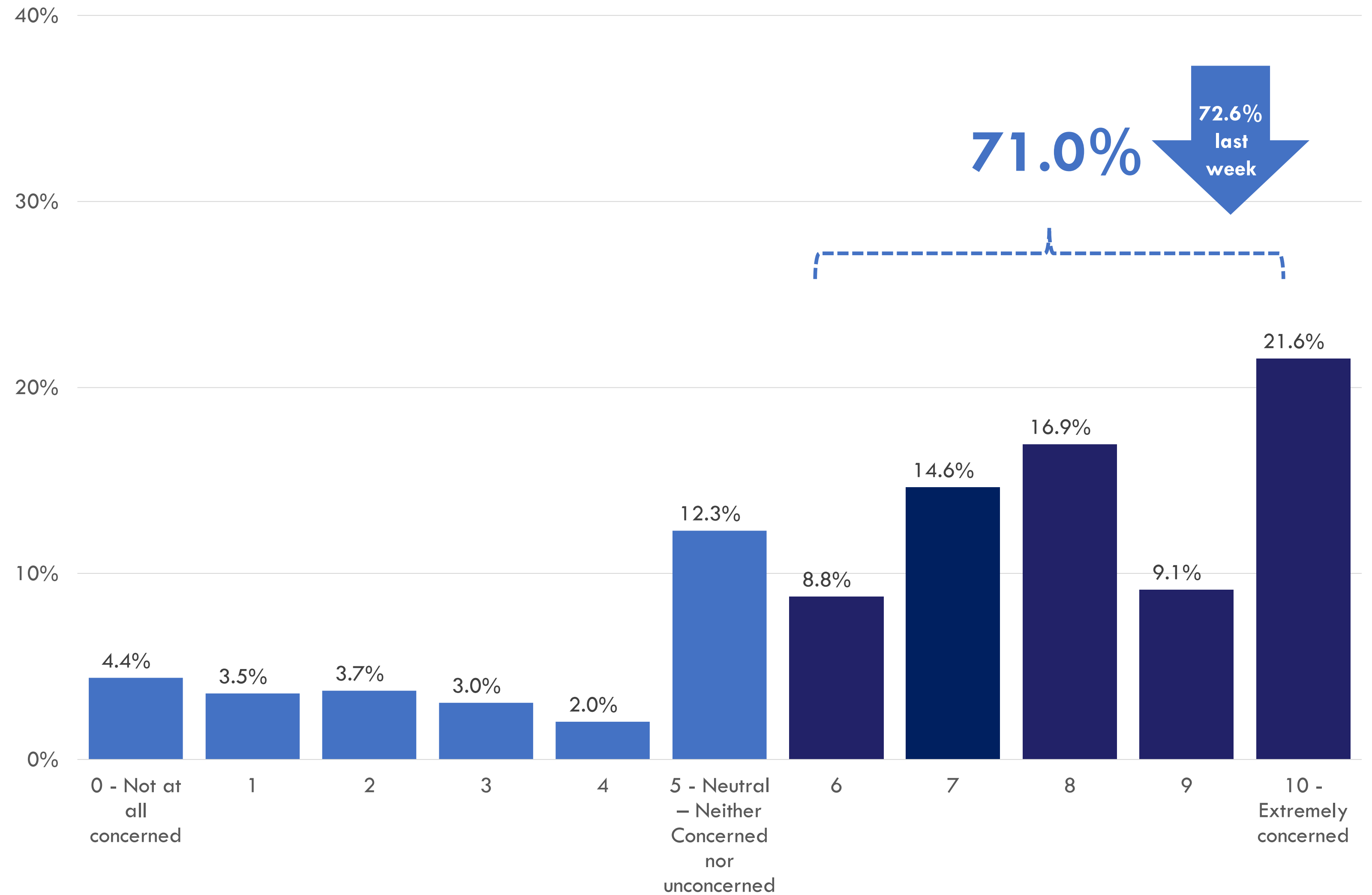
A person is sitting on a wooden log bench, looking out over a vast body of water under a bright sky. The person is wearing a yellow hat, a black leather jacket, a white face mask, and sunglasses. The text "How Americans are Feeling about the Pandemic" is overlaid in large blue letters across the center of the image.

How Americans are Feeling about the Pandemic

Personal Health Concerns

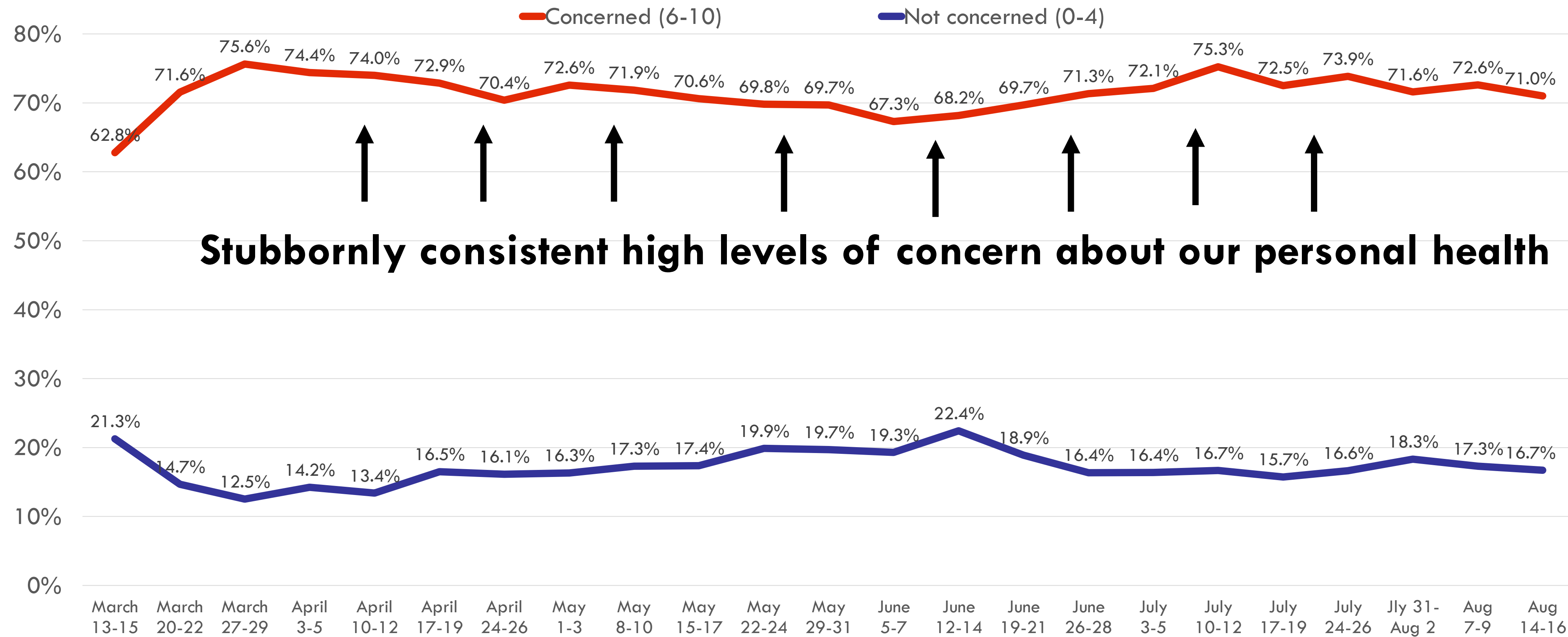
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(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



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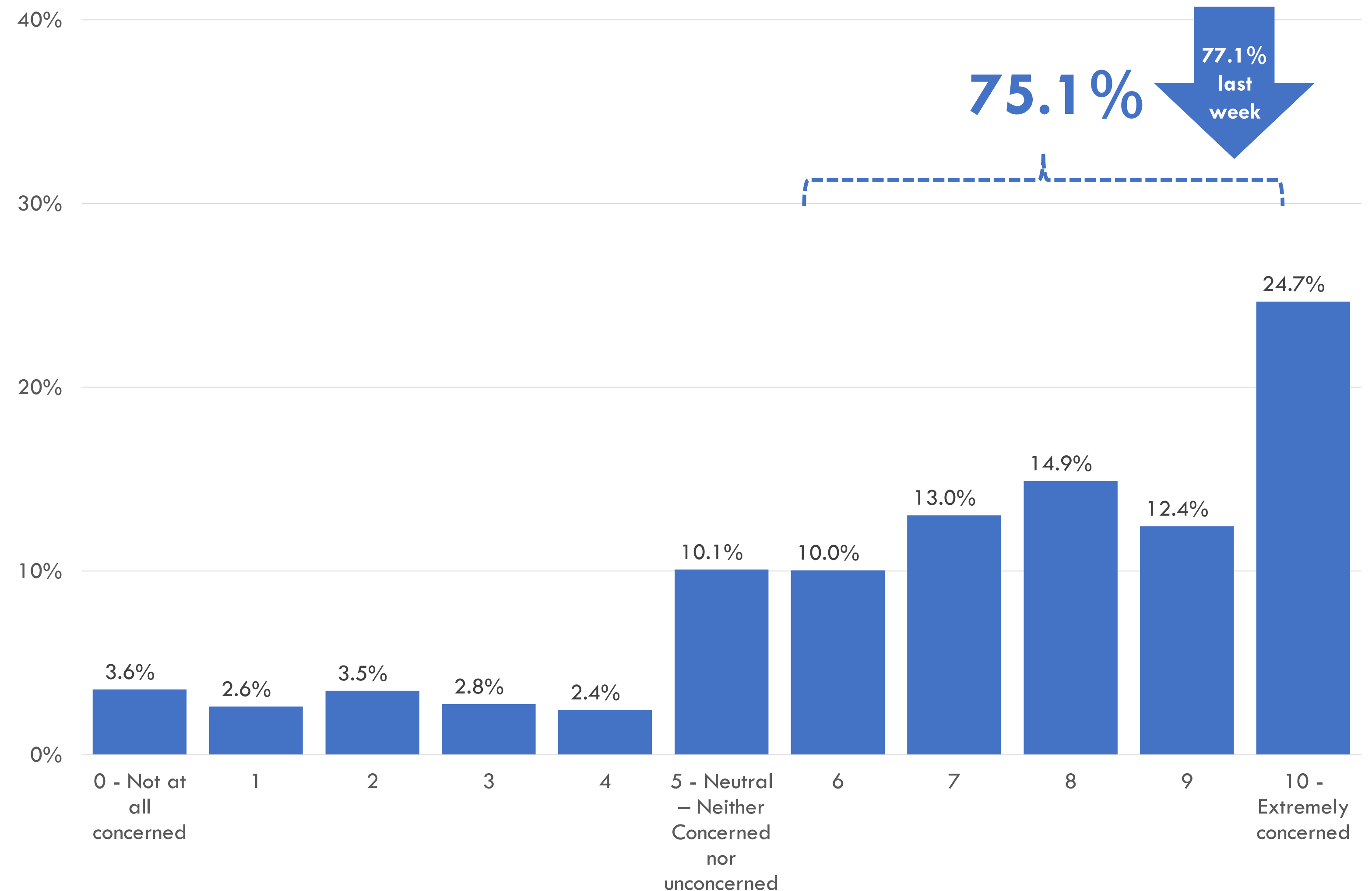


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Health Concerns (Family & Friends)

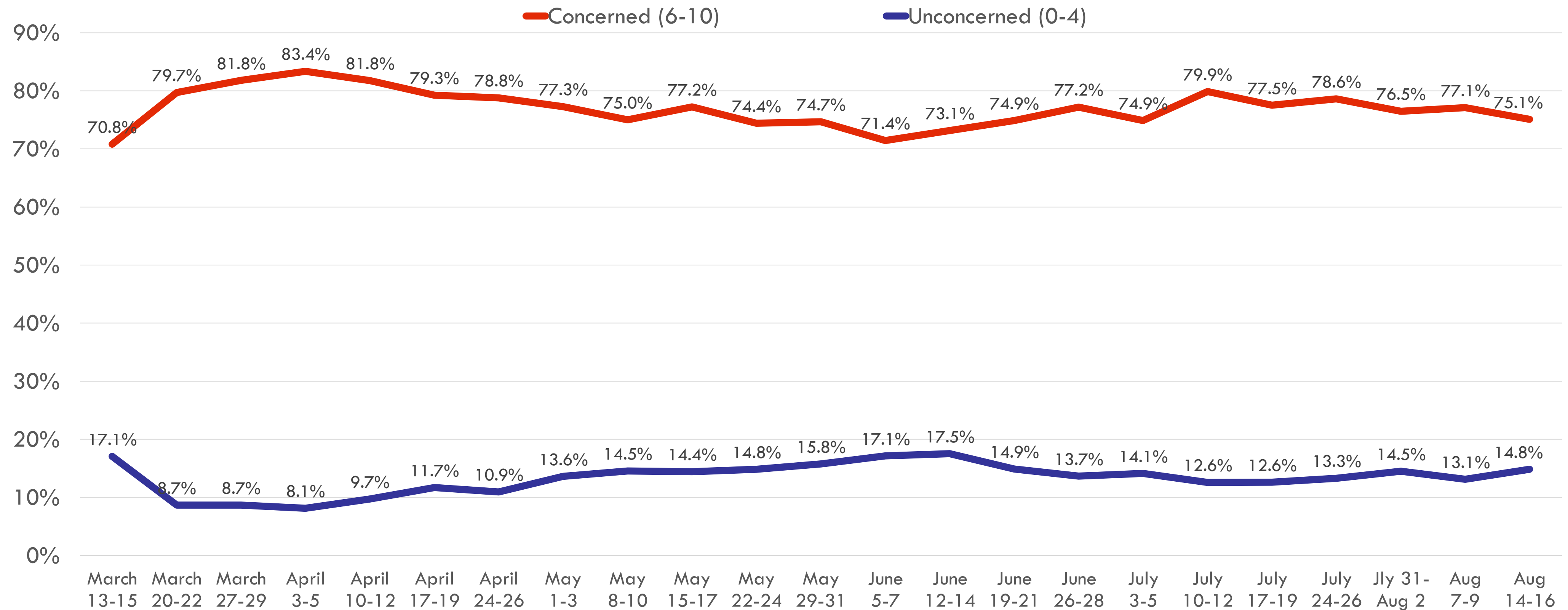
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

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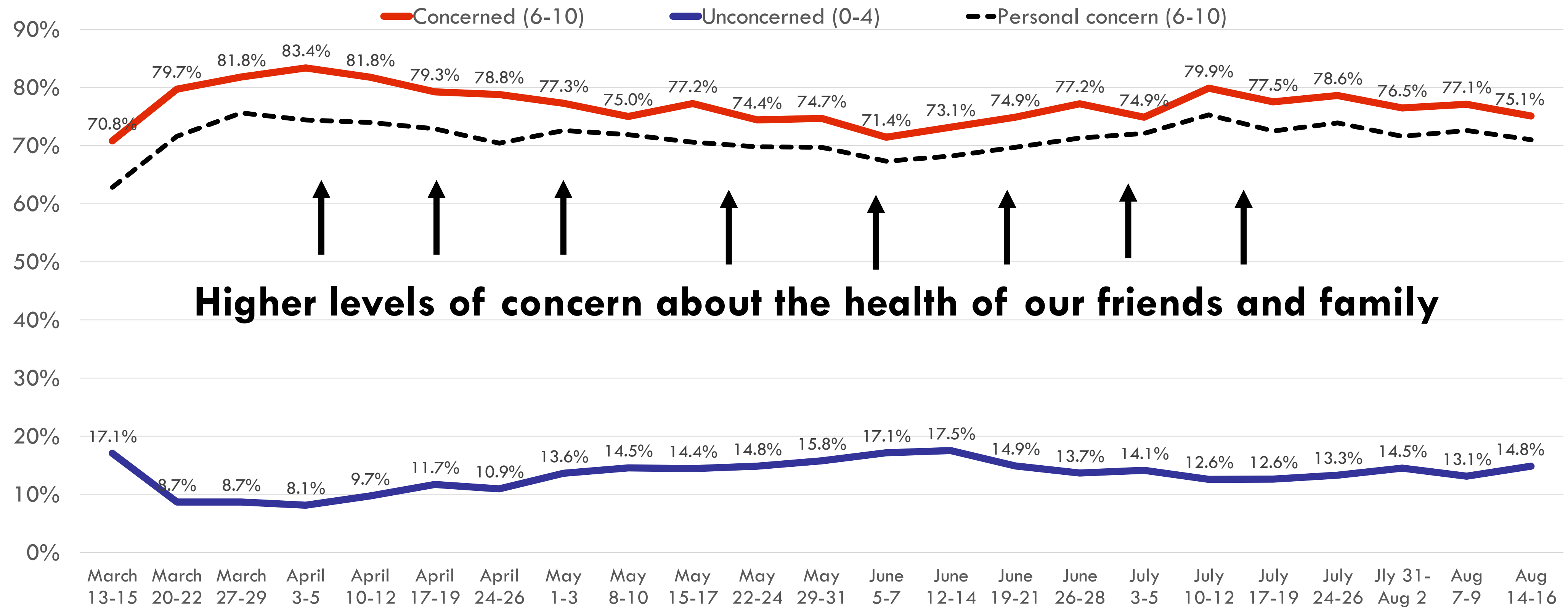
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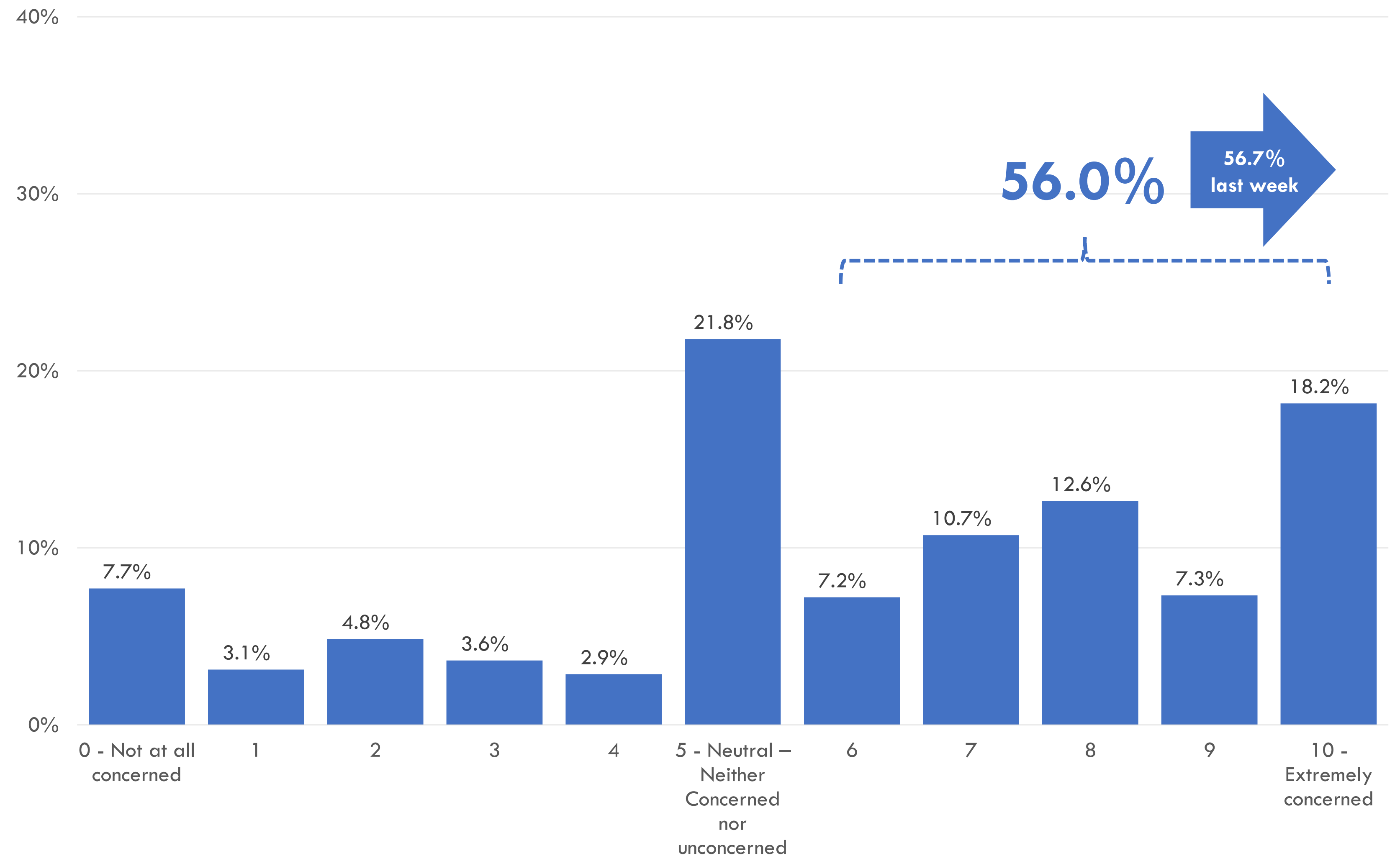
Higher levels of concern about the health of our friends and family

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Concerns About Personal Finances

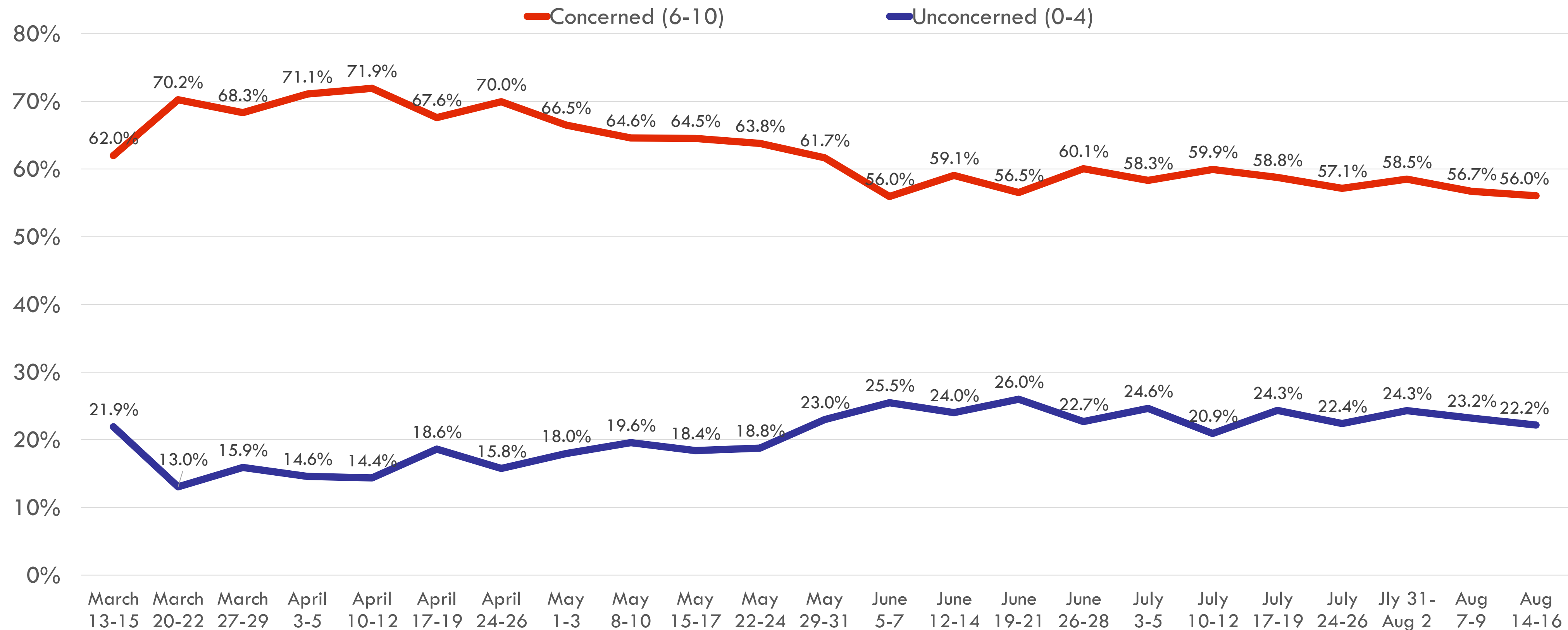
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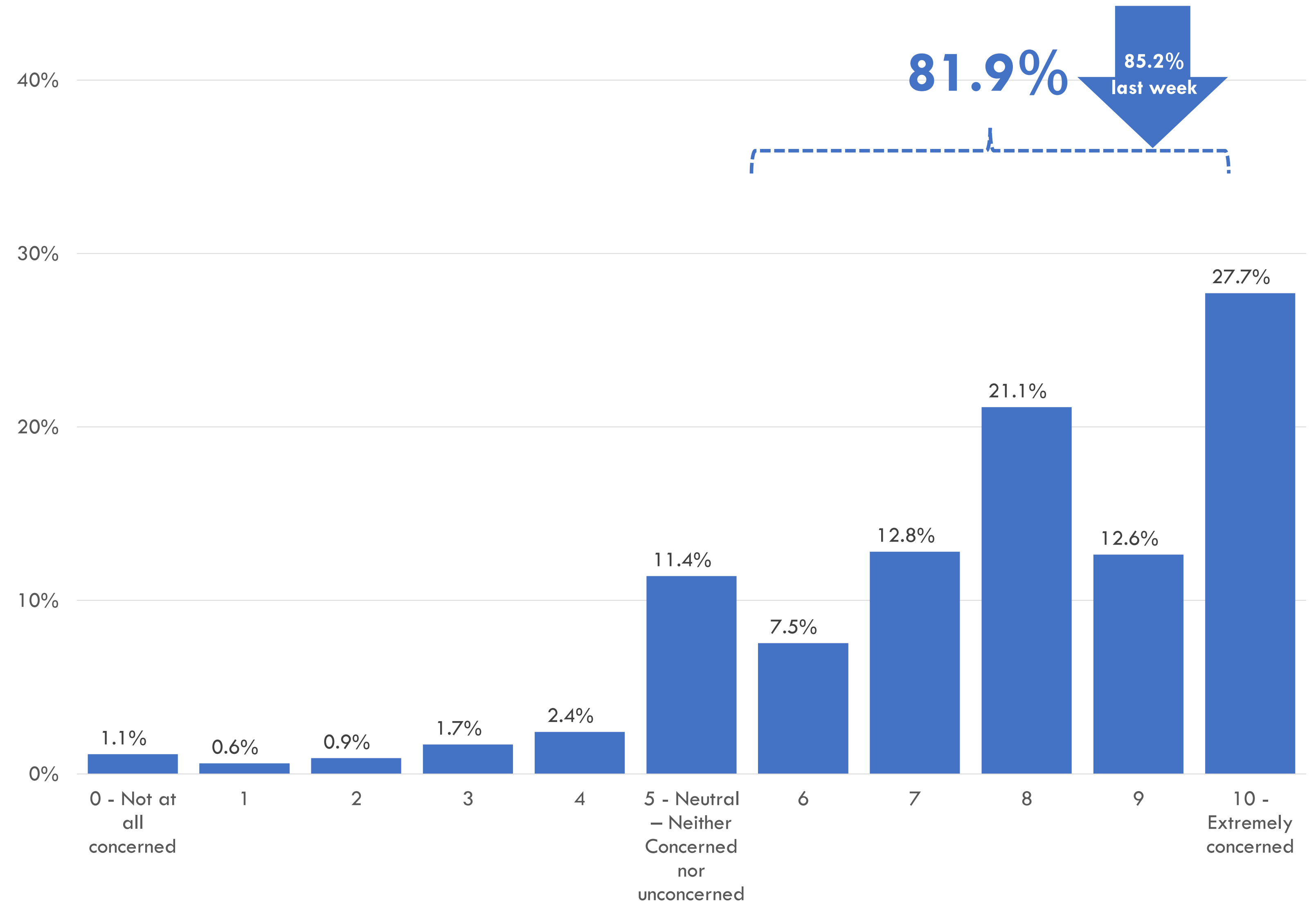


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Concerns About National Economy

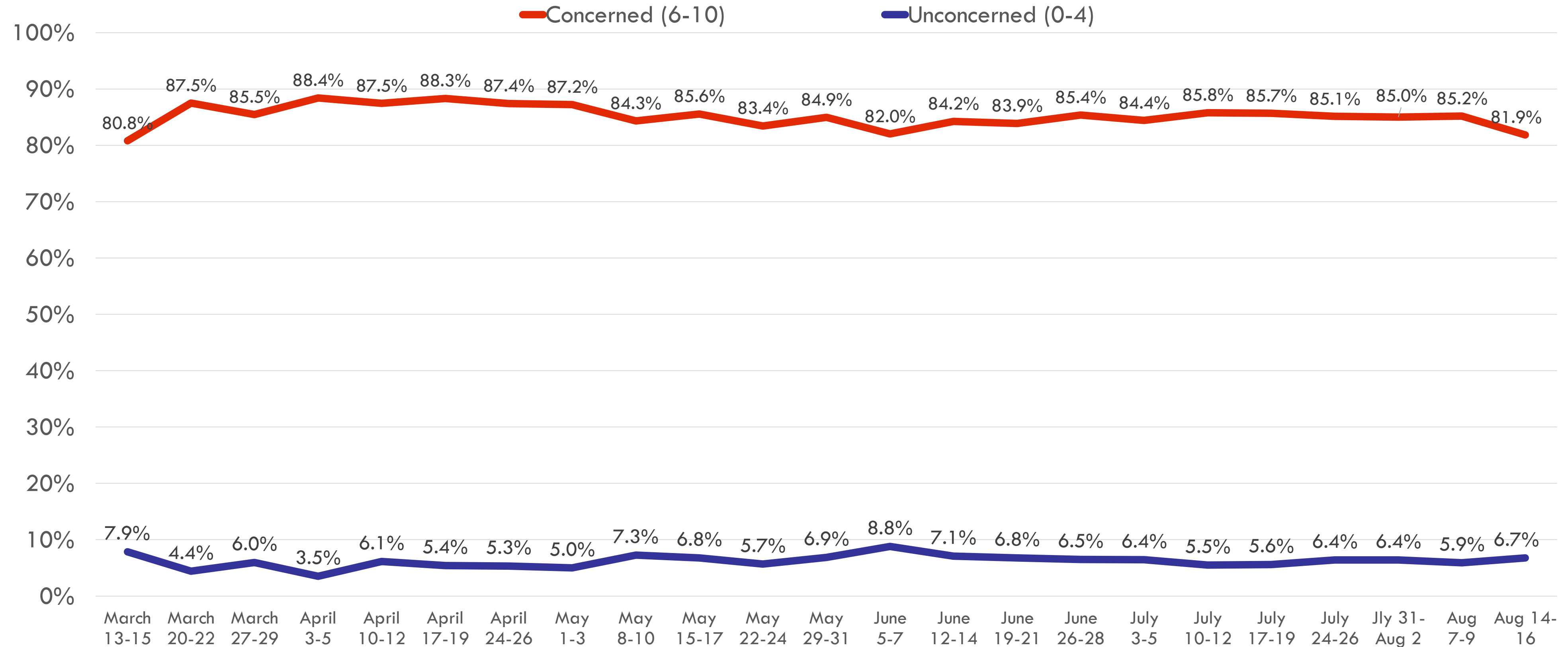
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Concerns About National Economy

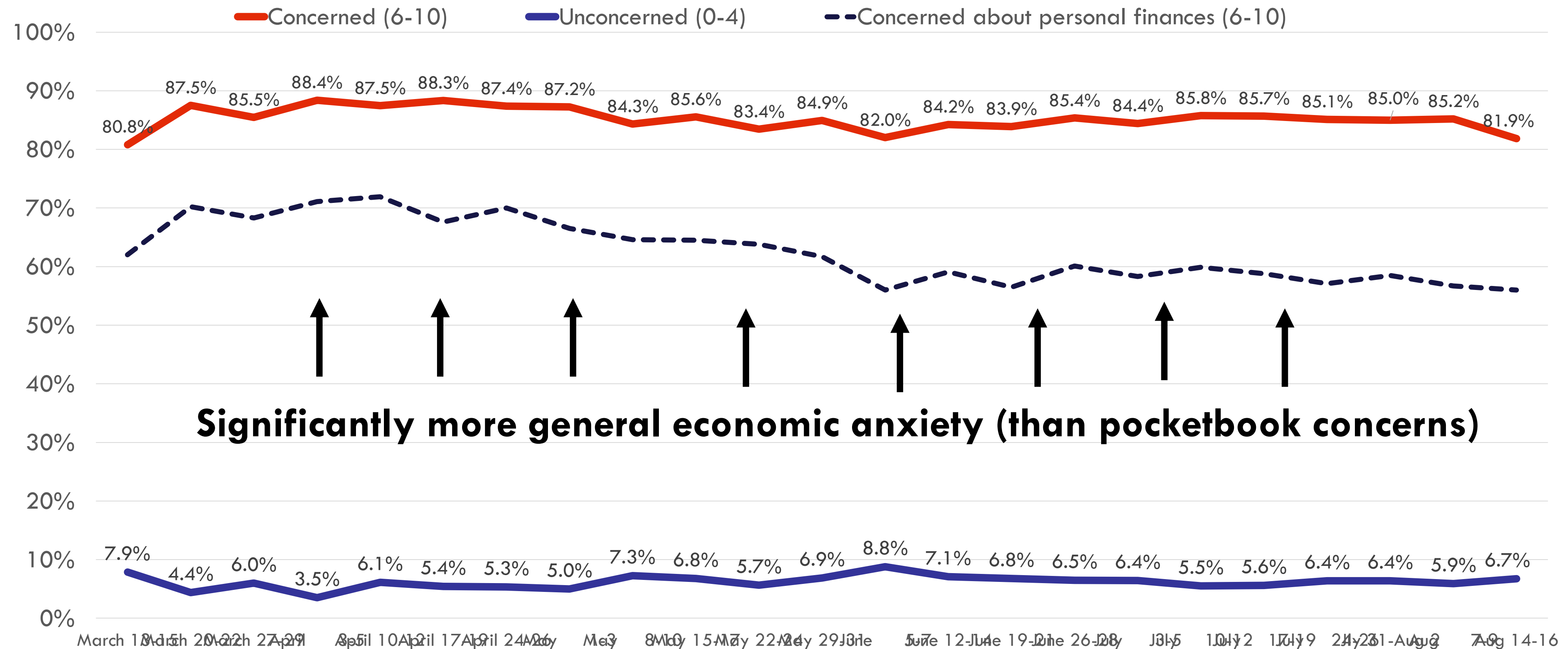
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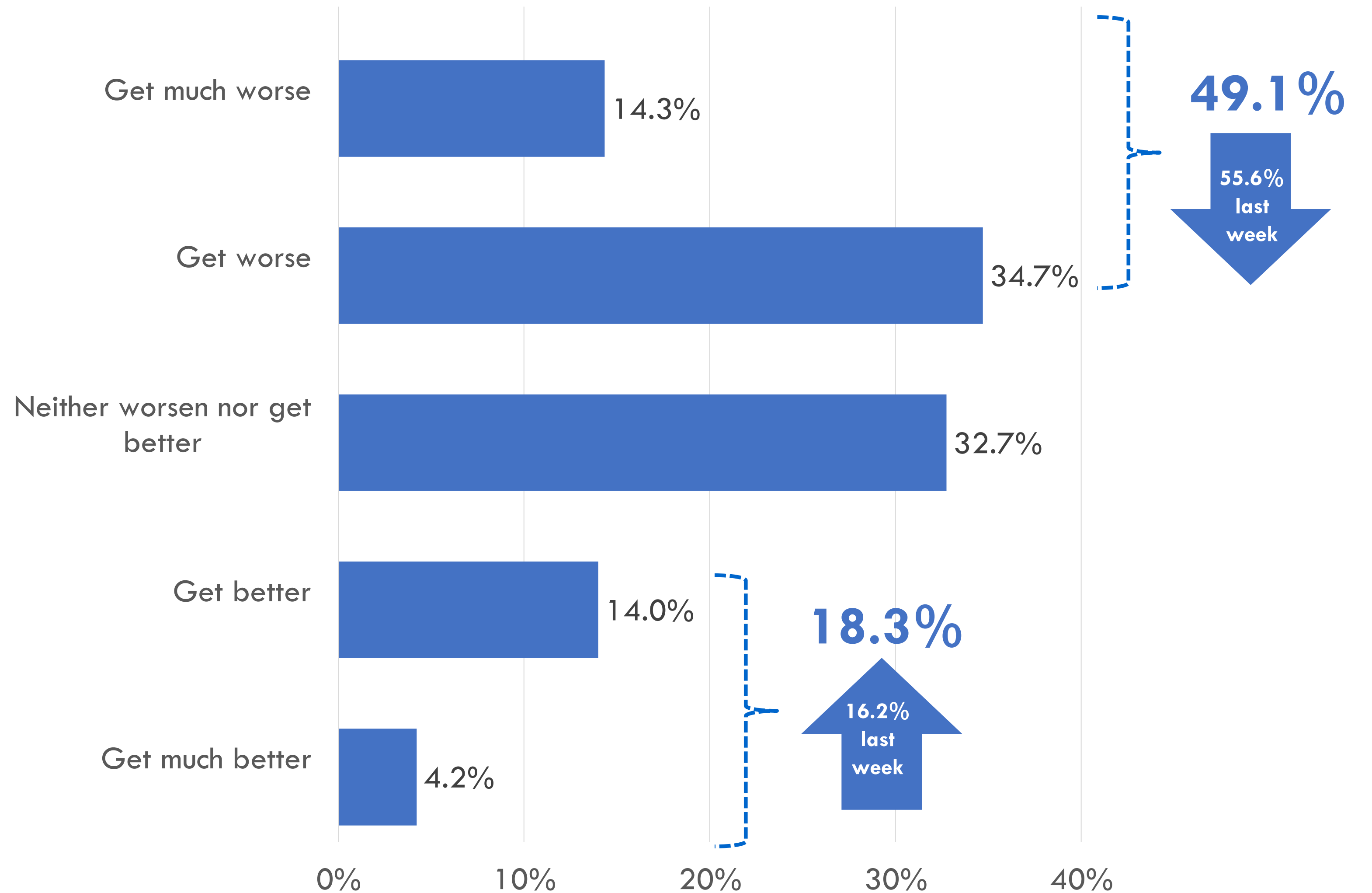
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Expectations for the Coronavirus Outbreak

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 _____

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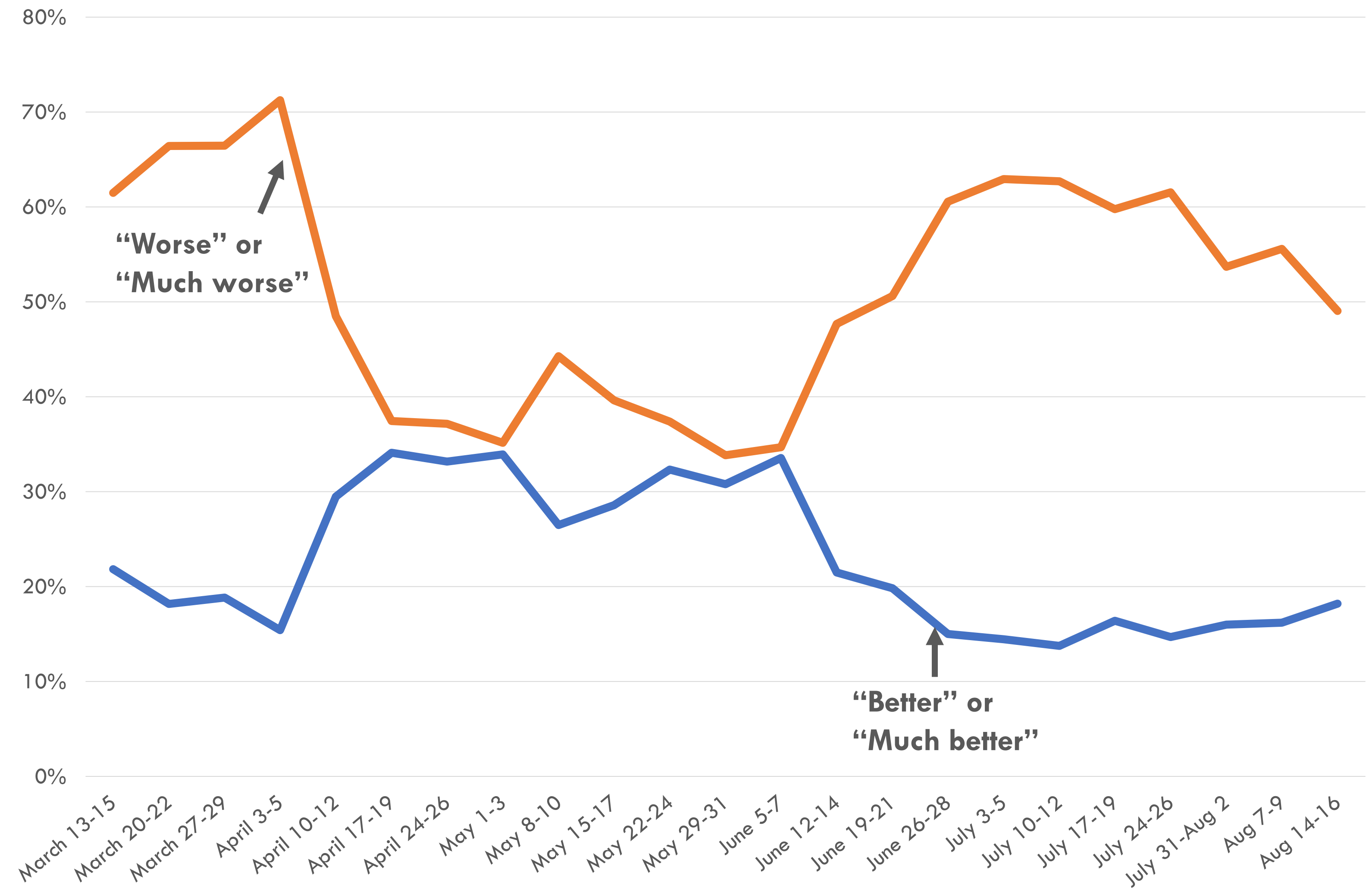


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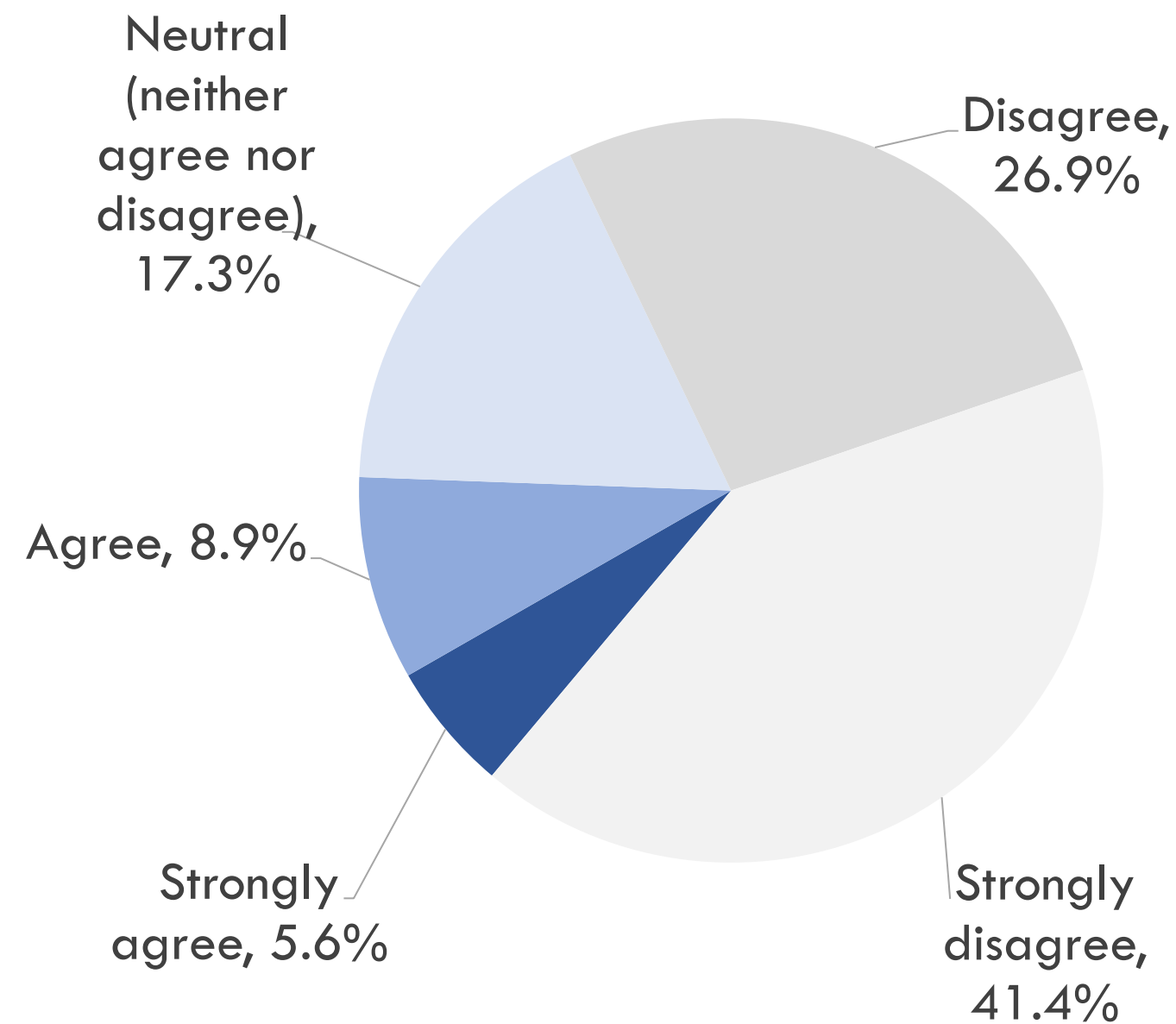
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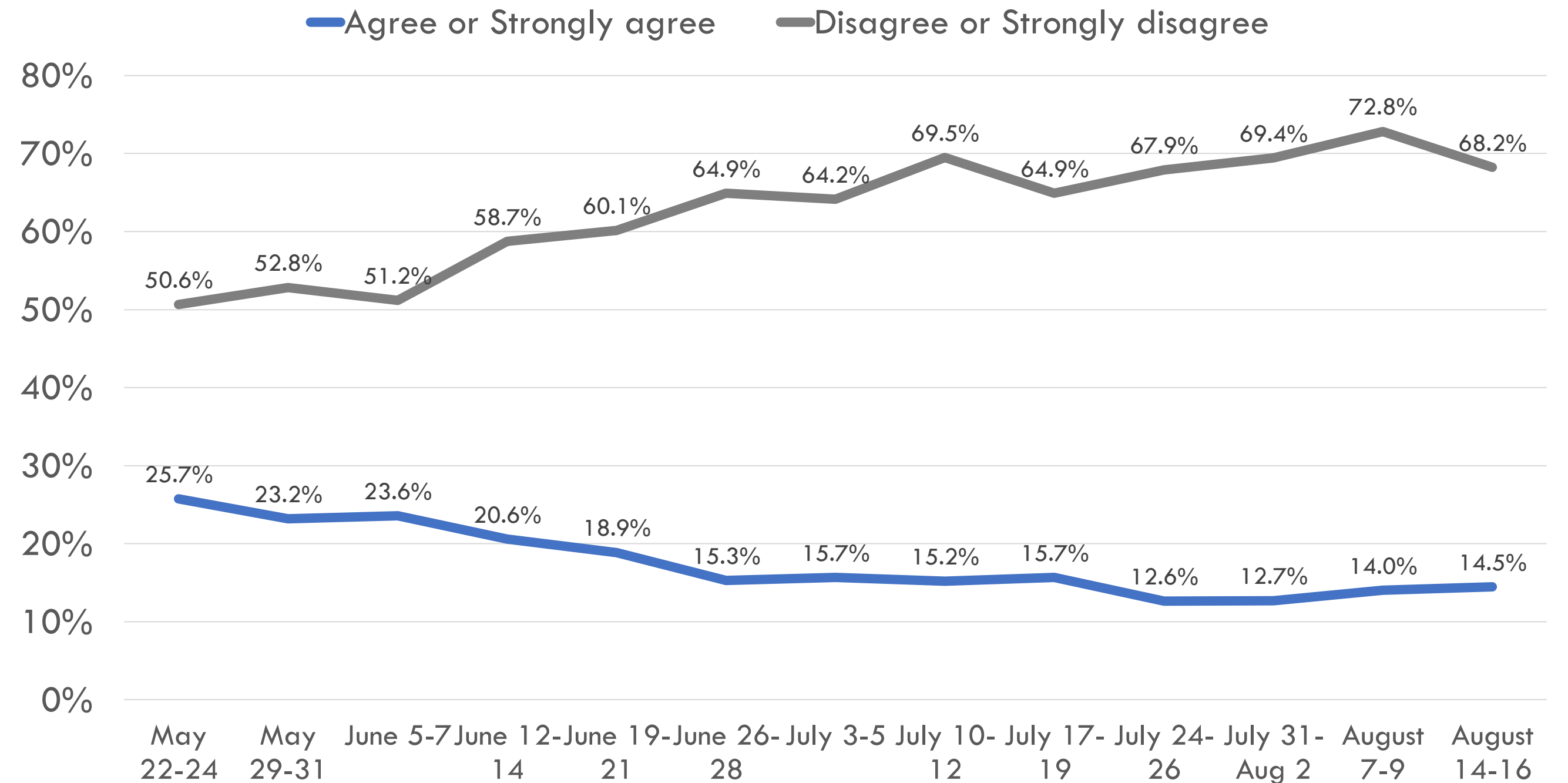
Expectations for Pandemic's Resolution by Fall

How much do you agree with the following statement?

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



Historical data

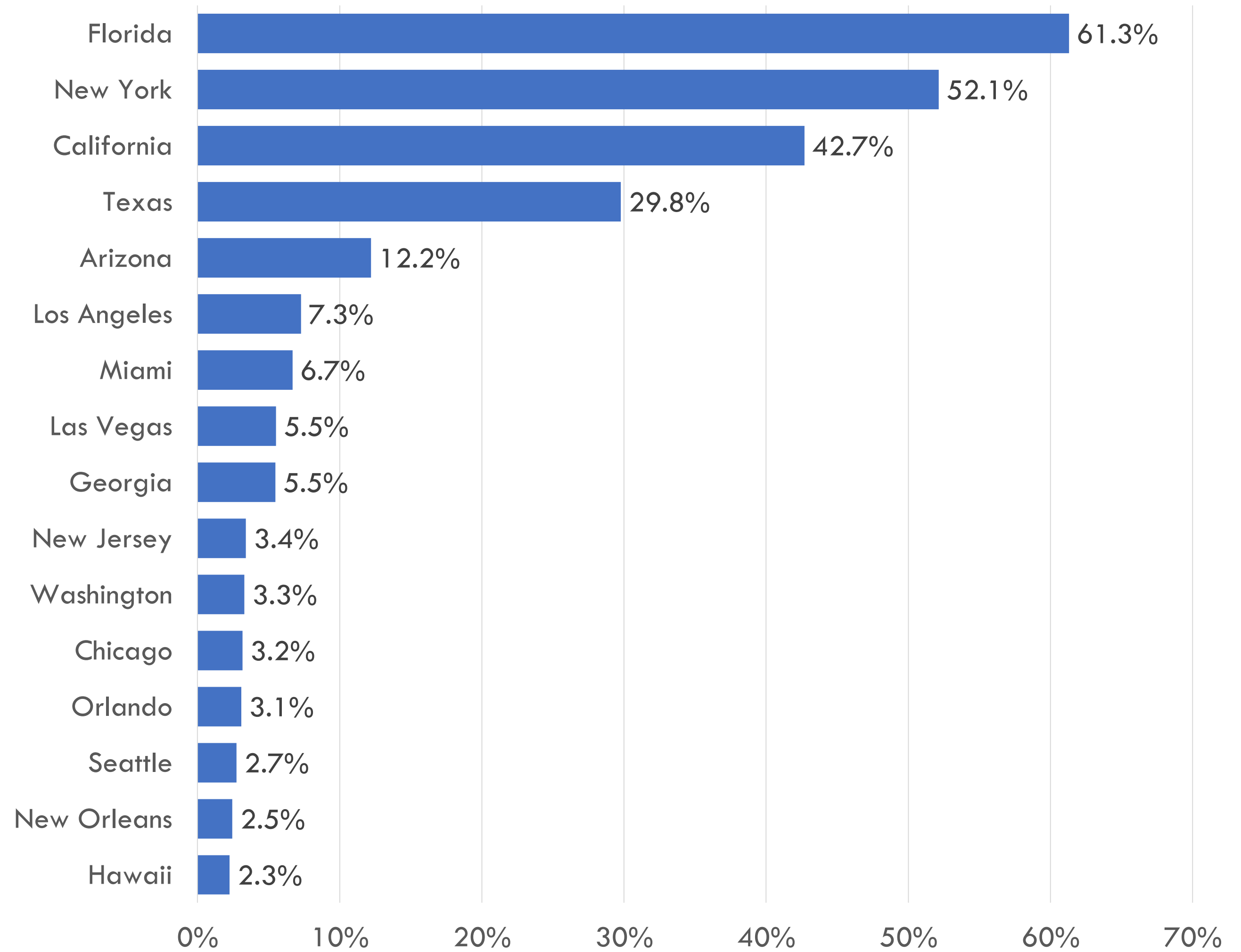


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Most Talked About Coronavirus Hotspots

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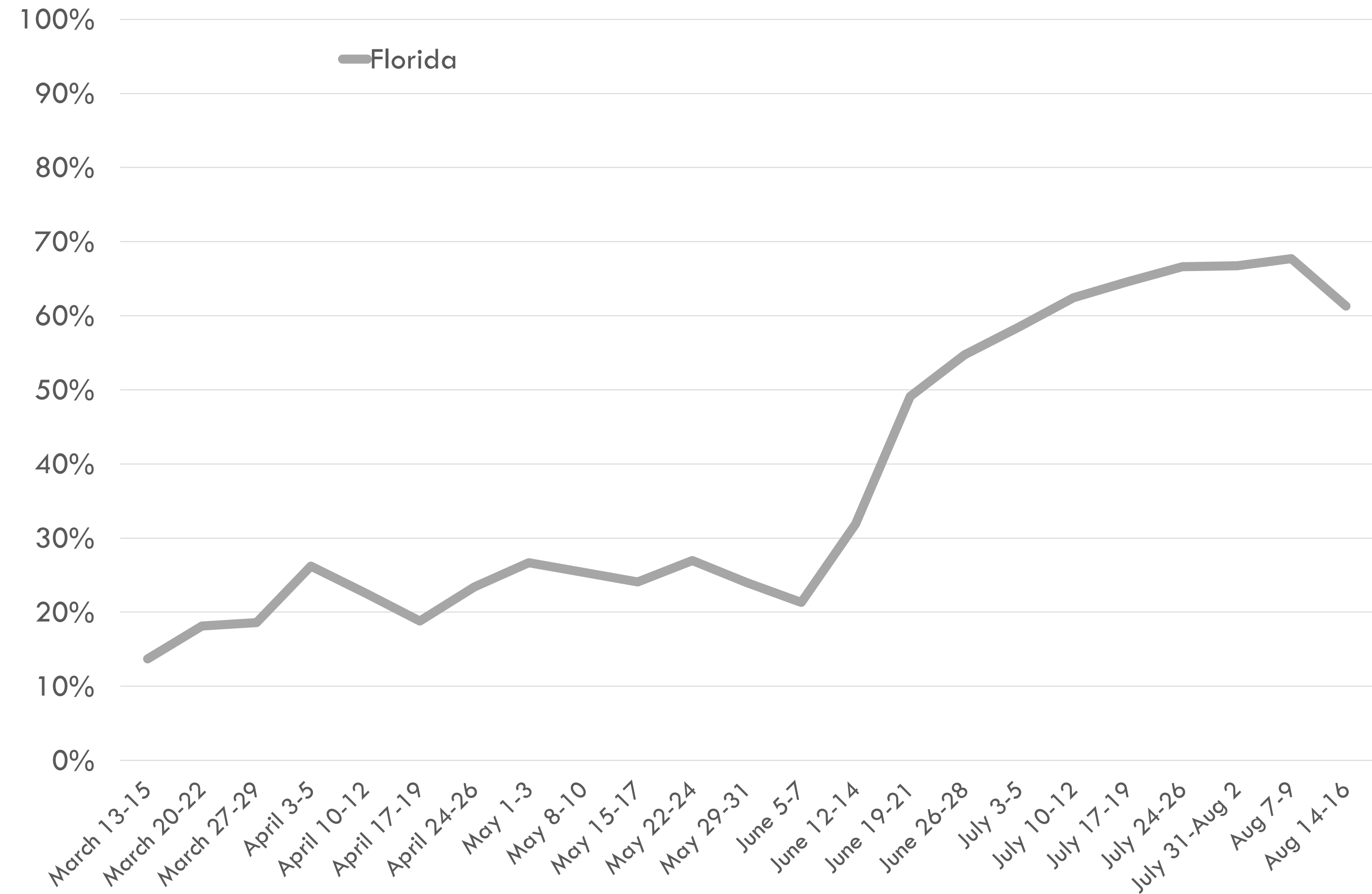
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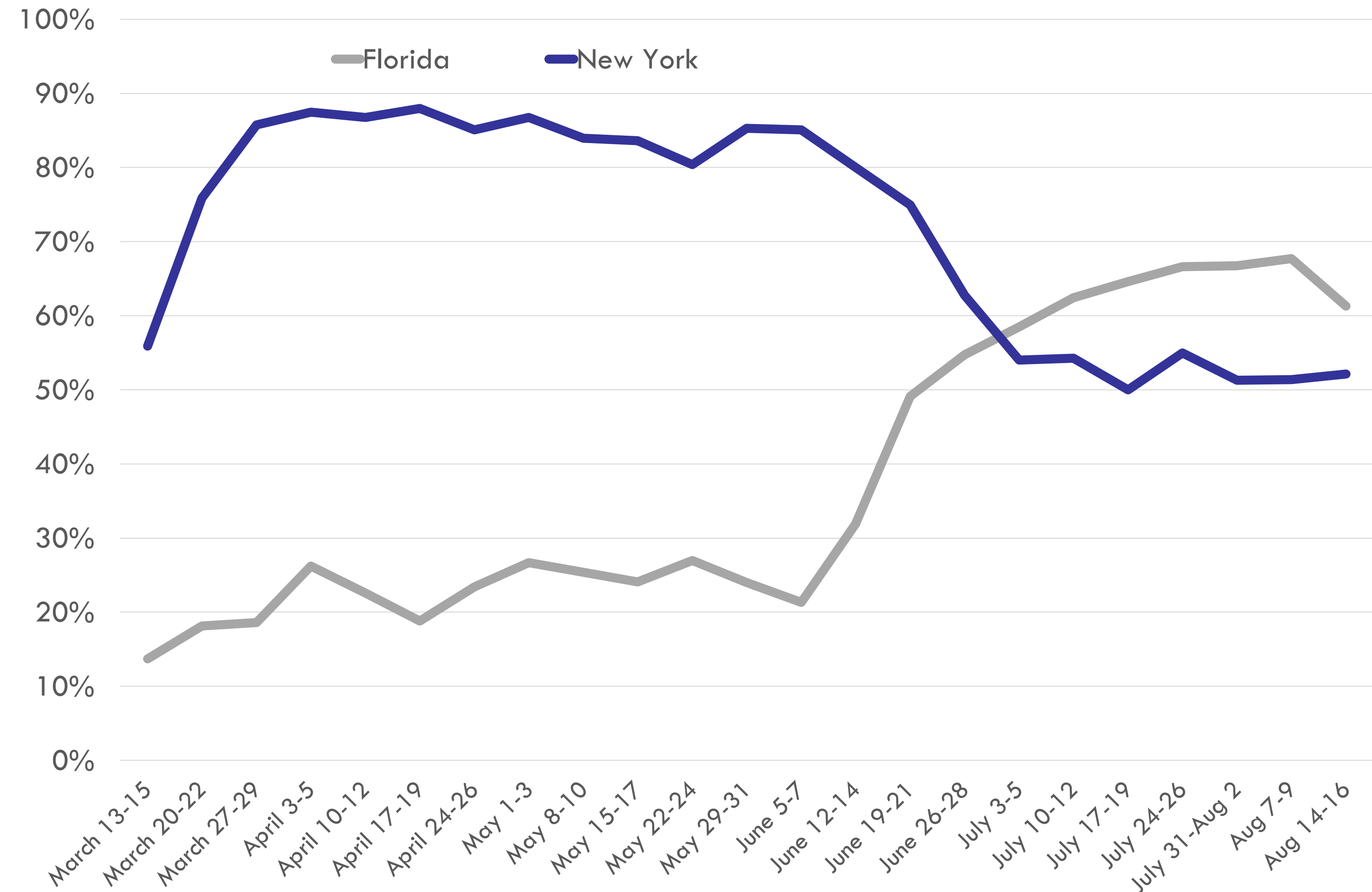
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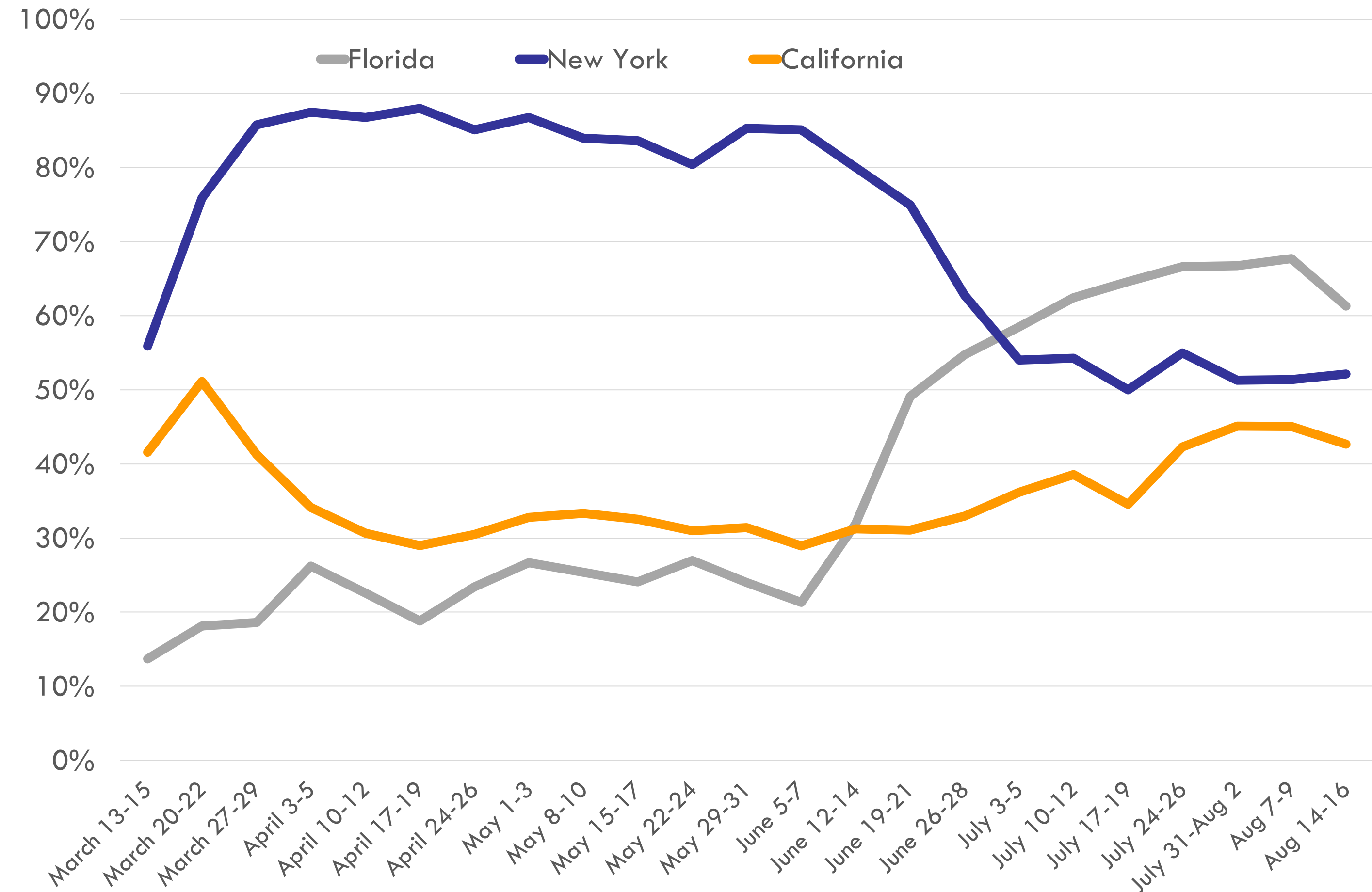
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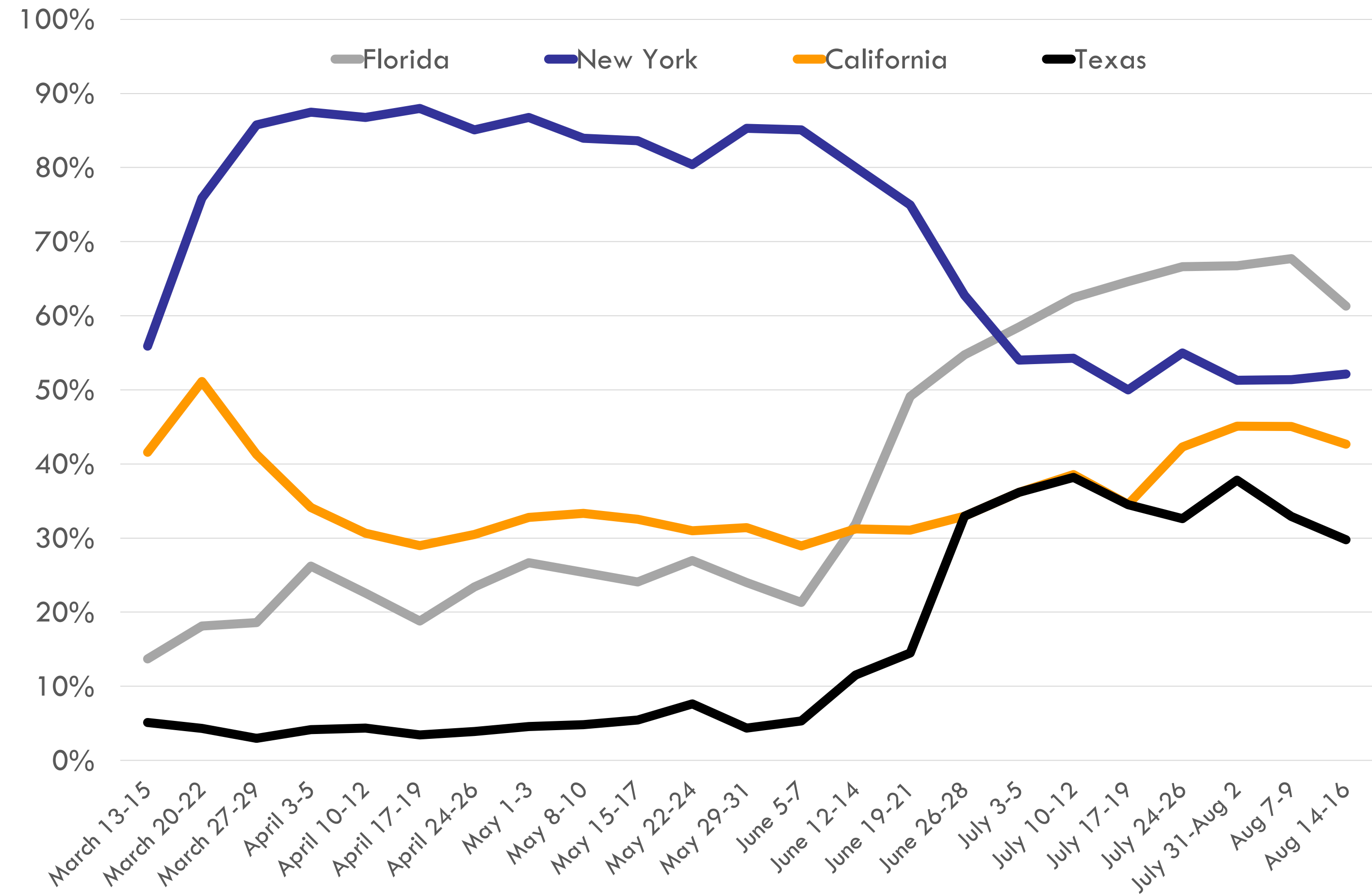
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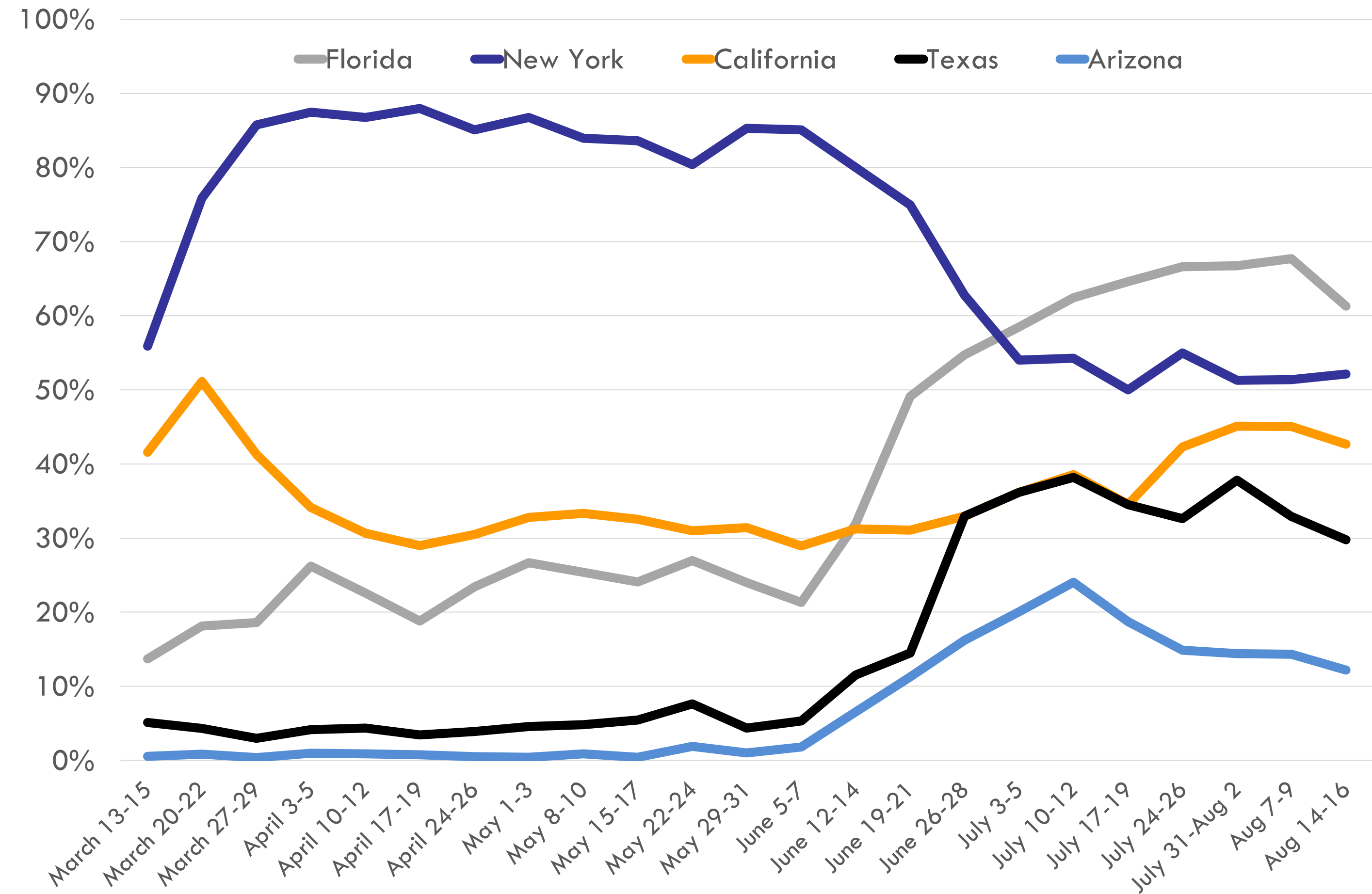
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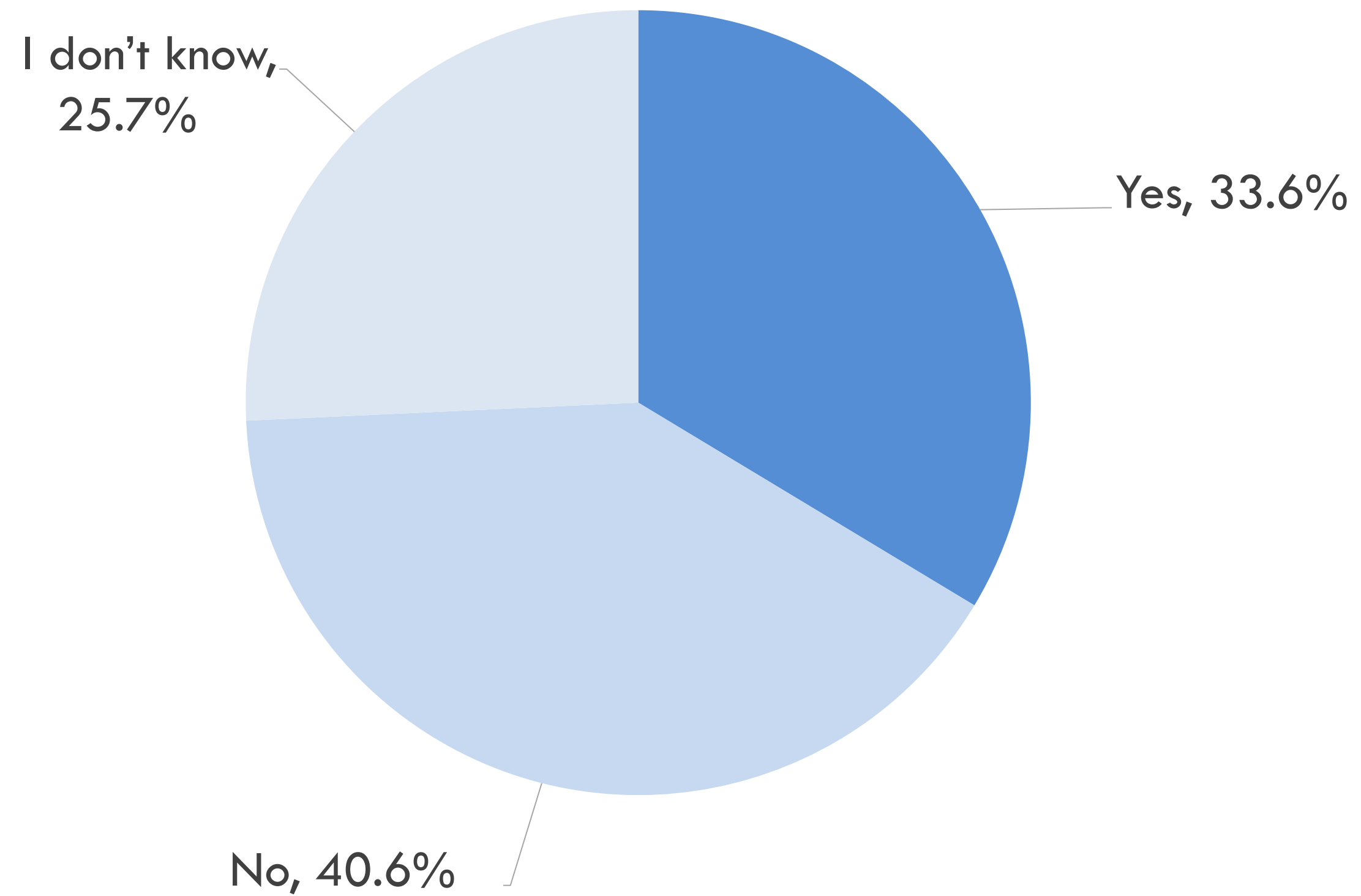
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Impact of Coronavirus Issues on Future Intent to Visit

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?

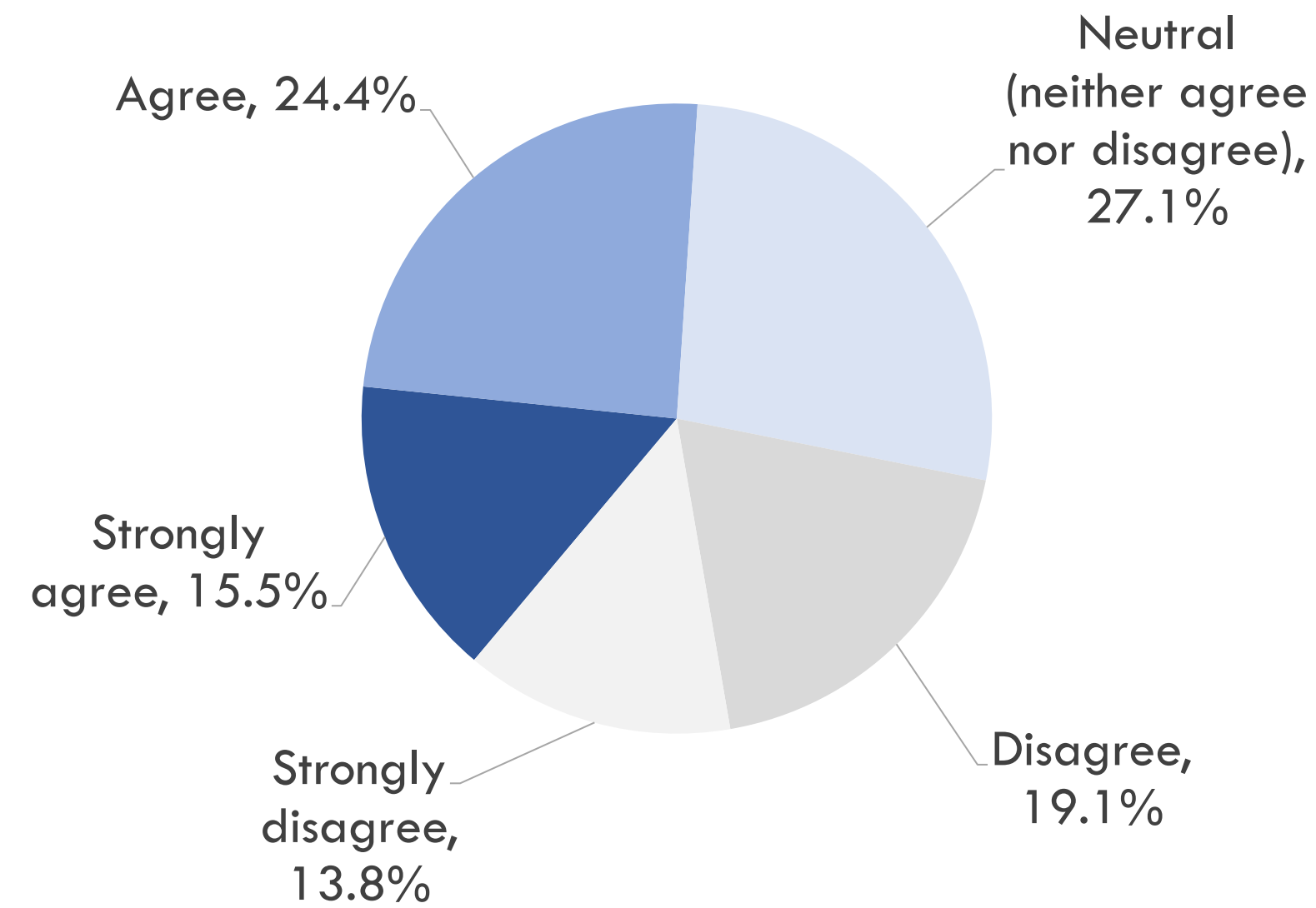
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Comfort Enjoying Home Community

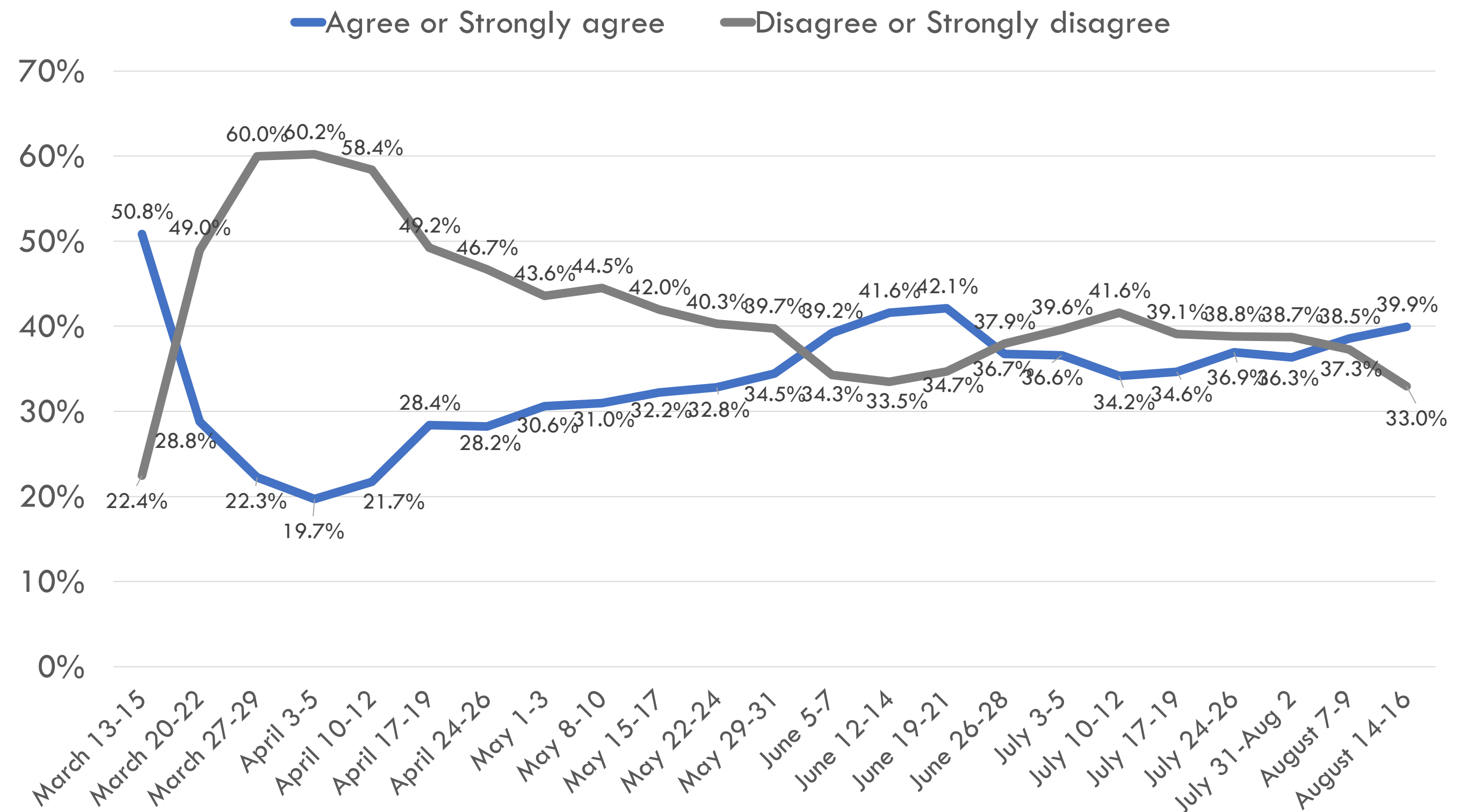
How much do you agree with the following statement?

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



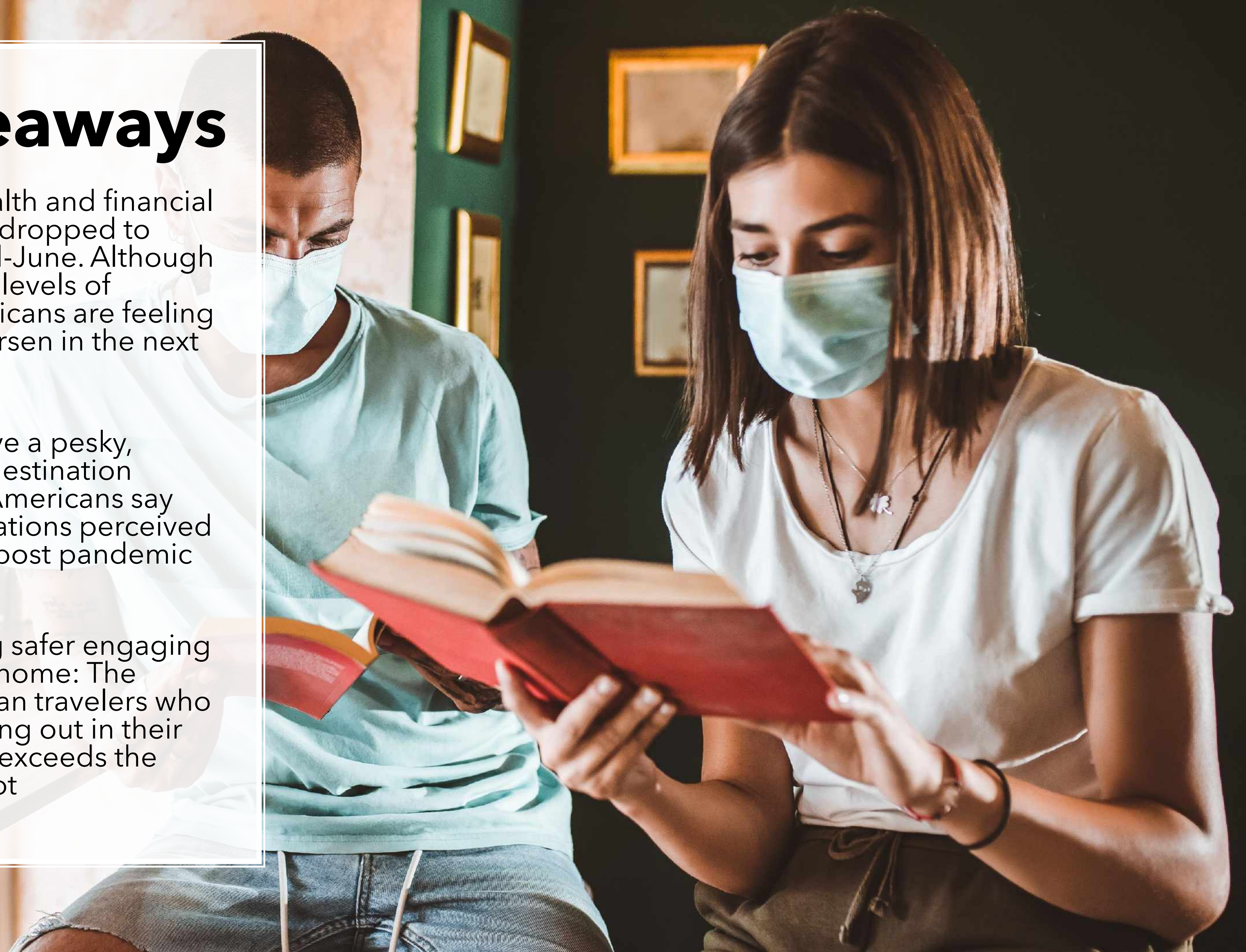
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Historical data



Key Takeaways

- Pandemic-related health and financial safety concerns have dropped to levels last seen in mid-June. Although there are still notable levels of pessimism, less Americans are feeling the pandemic will worsen in the next month
- The crisis looks to have a pesky, lingering impact for destination brands, as a third of Americans say they will avoid destinations perceived to be virus hot-spots post pandemic
- Americans are feeling safer engaging in leisure activities at home: The proportion of American travelers who feels comfortable going out in their own community now exceeds the proportion who do not



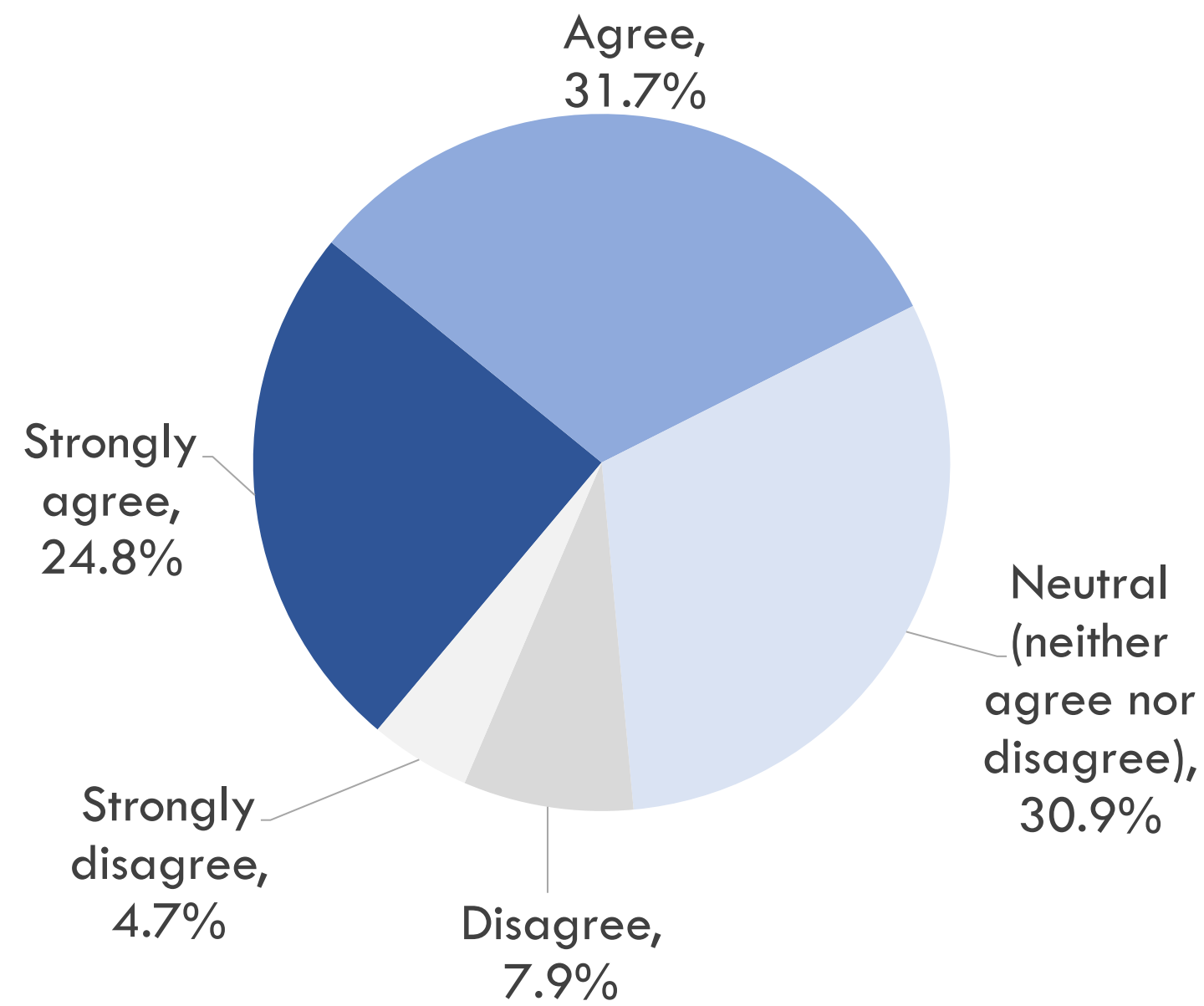
How Americans are Feeling about Travel



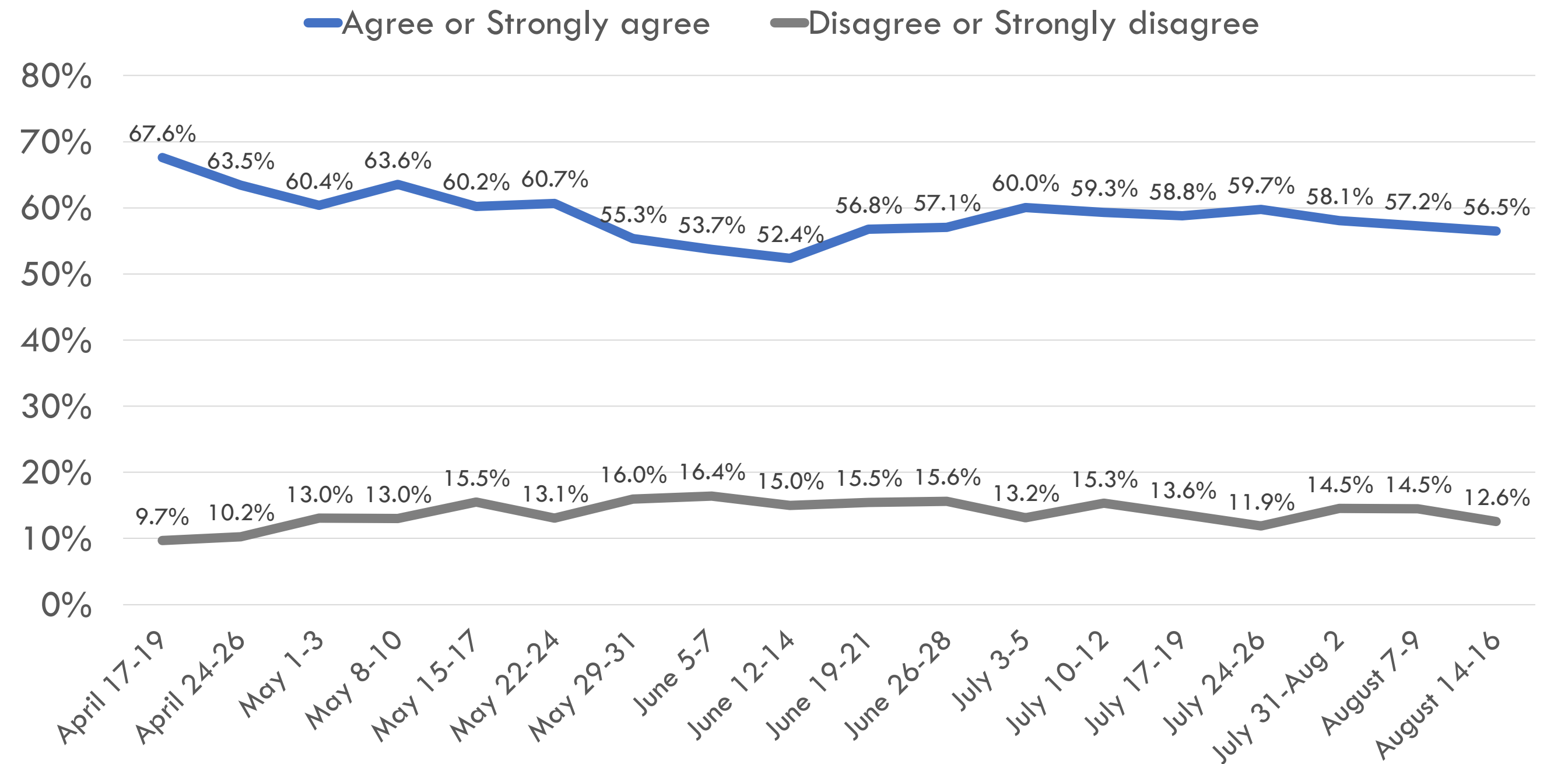
Travelers in Community are Unwanted

How much do you agree with the following statement?

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



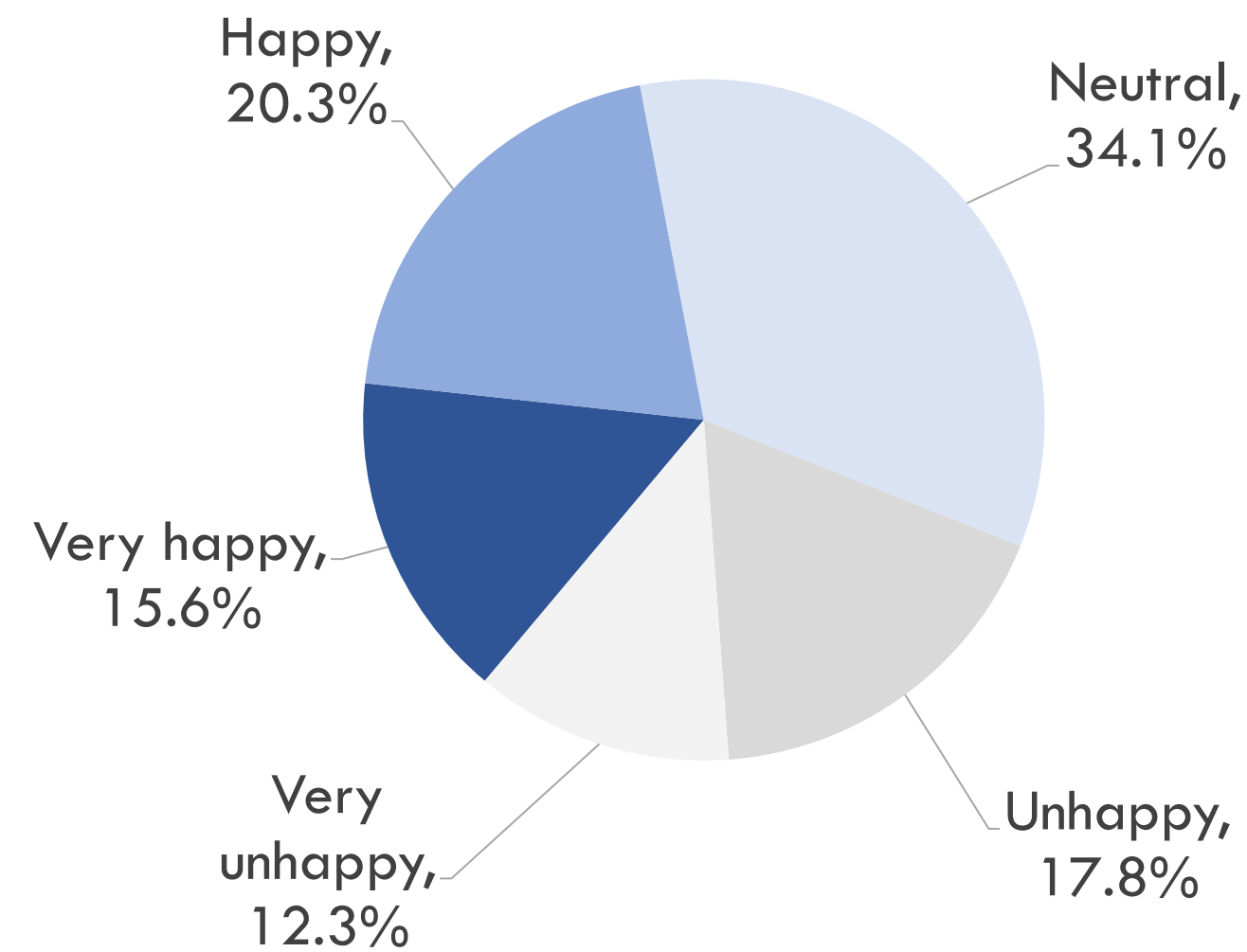
Historical data



(Base: Waves 6-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

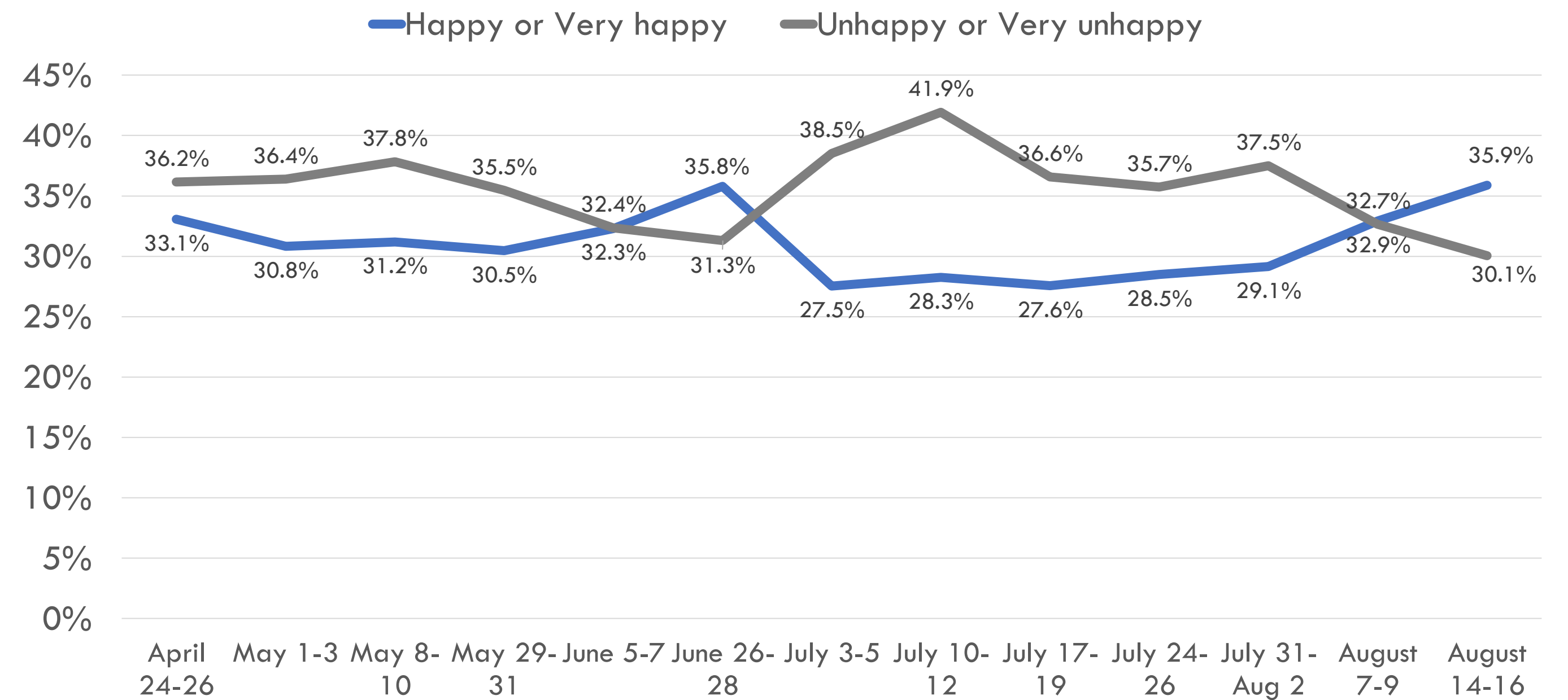
Feelings About Seeing an Ad Promoting Tourism to Community

Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?



(Base: Waves 7-9, 12 and 16-23. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

Historical data

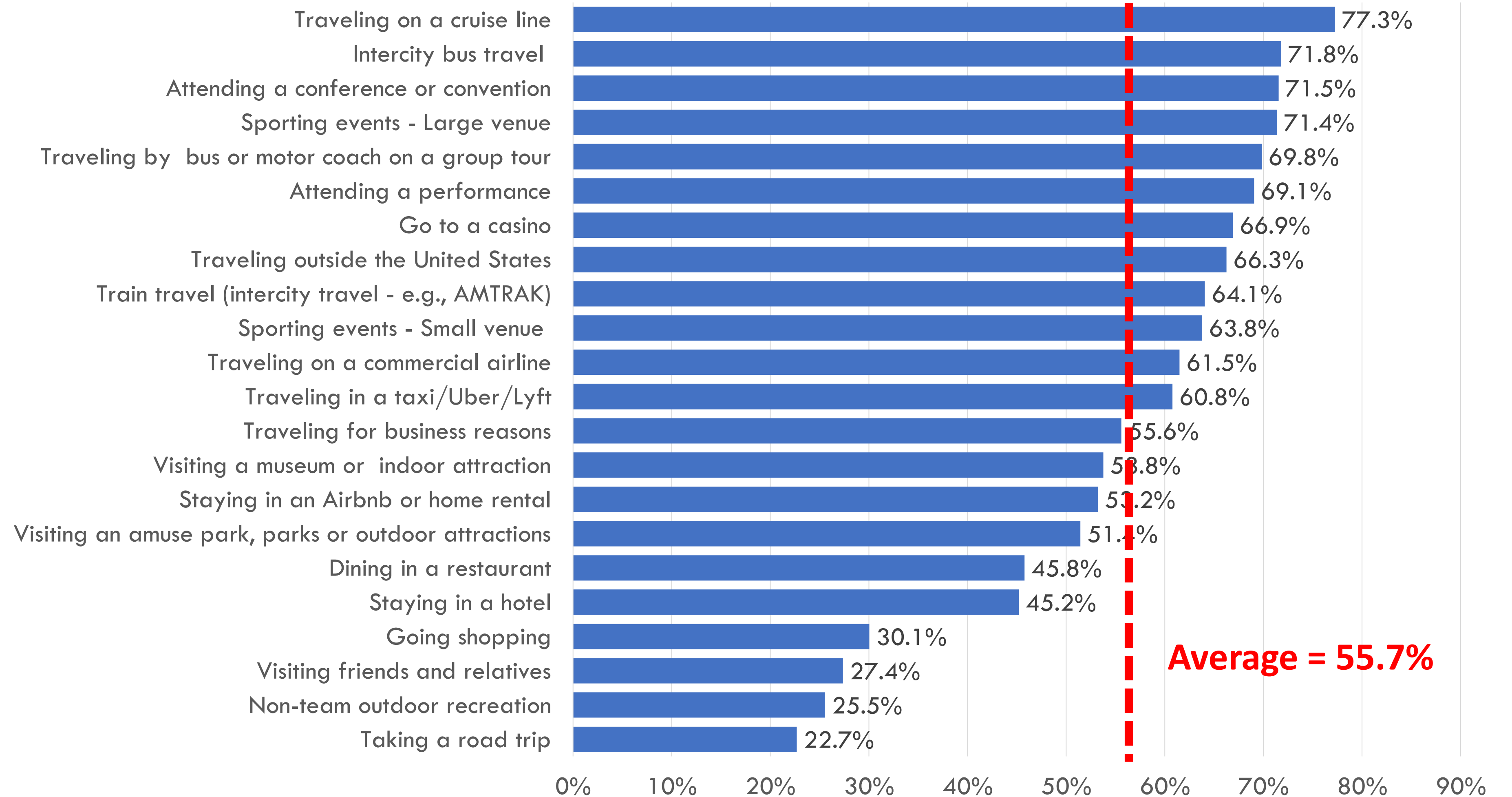


Perceived Safety of Travel Activities (Wave 23)

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

(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

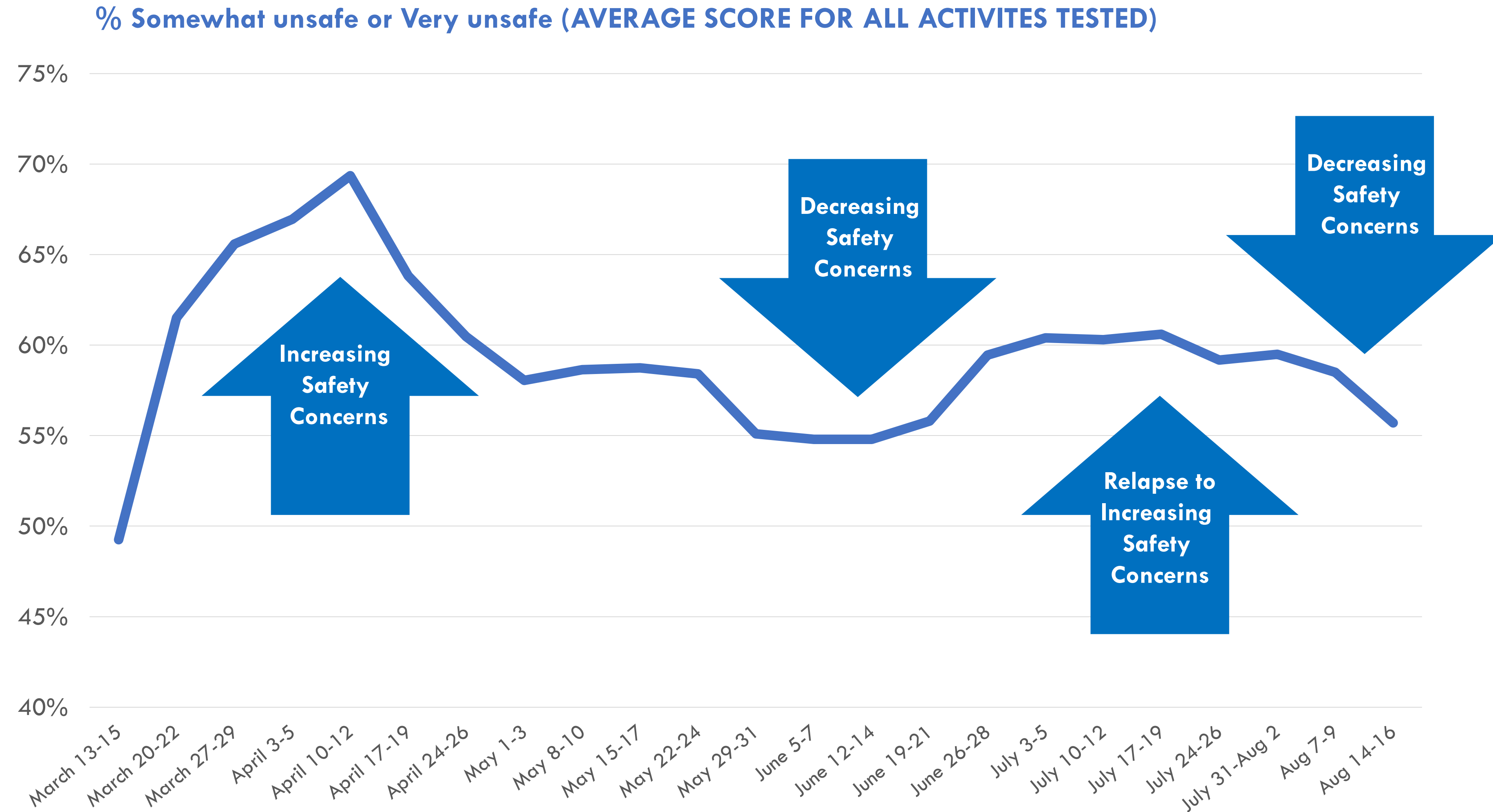
Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”



Perceived Safety of Travel Activities (Waves 1-23 Comparison)

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

(Base: Waves 1-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

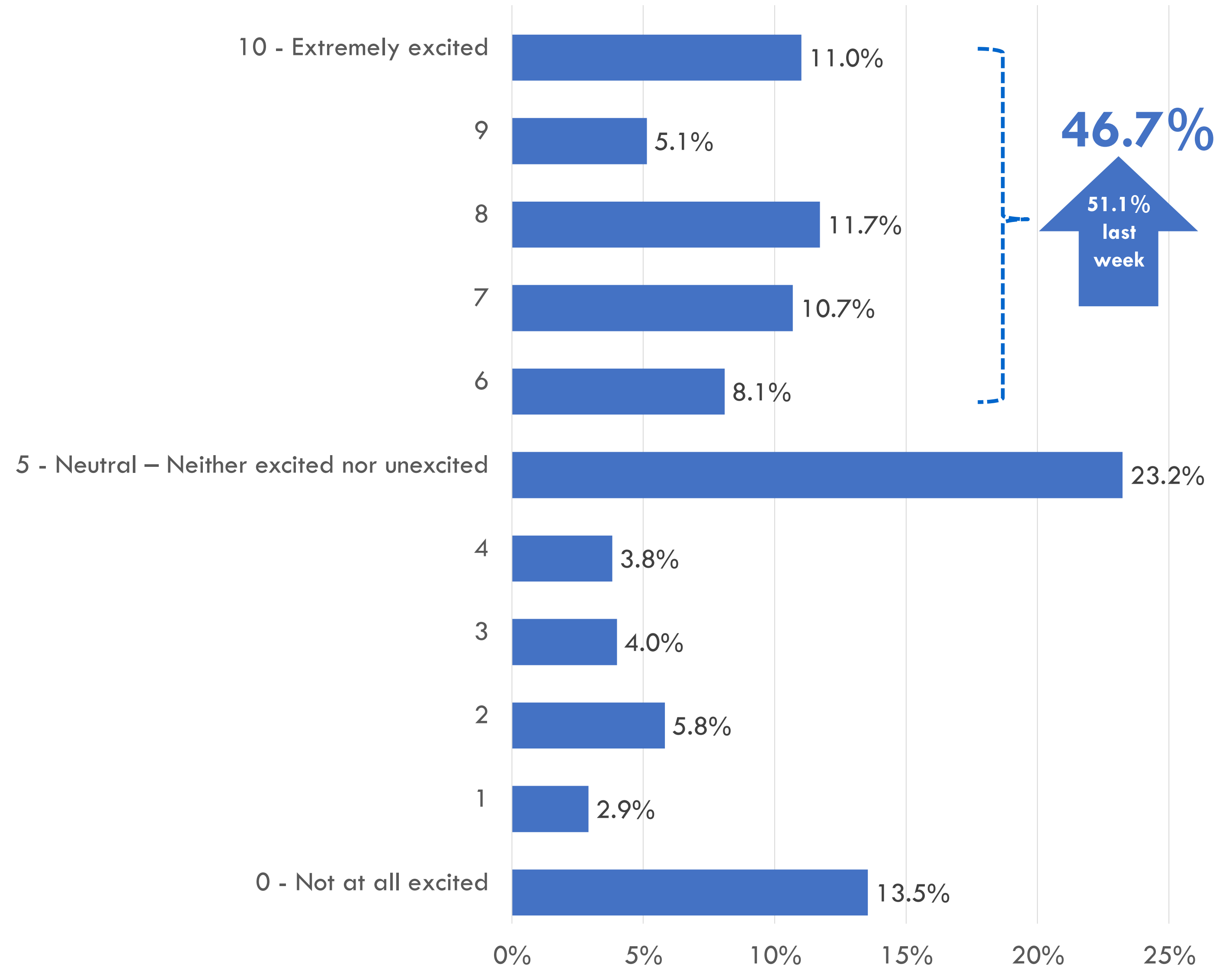


Excitement to Travel Now

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)

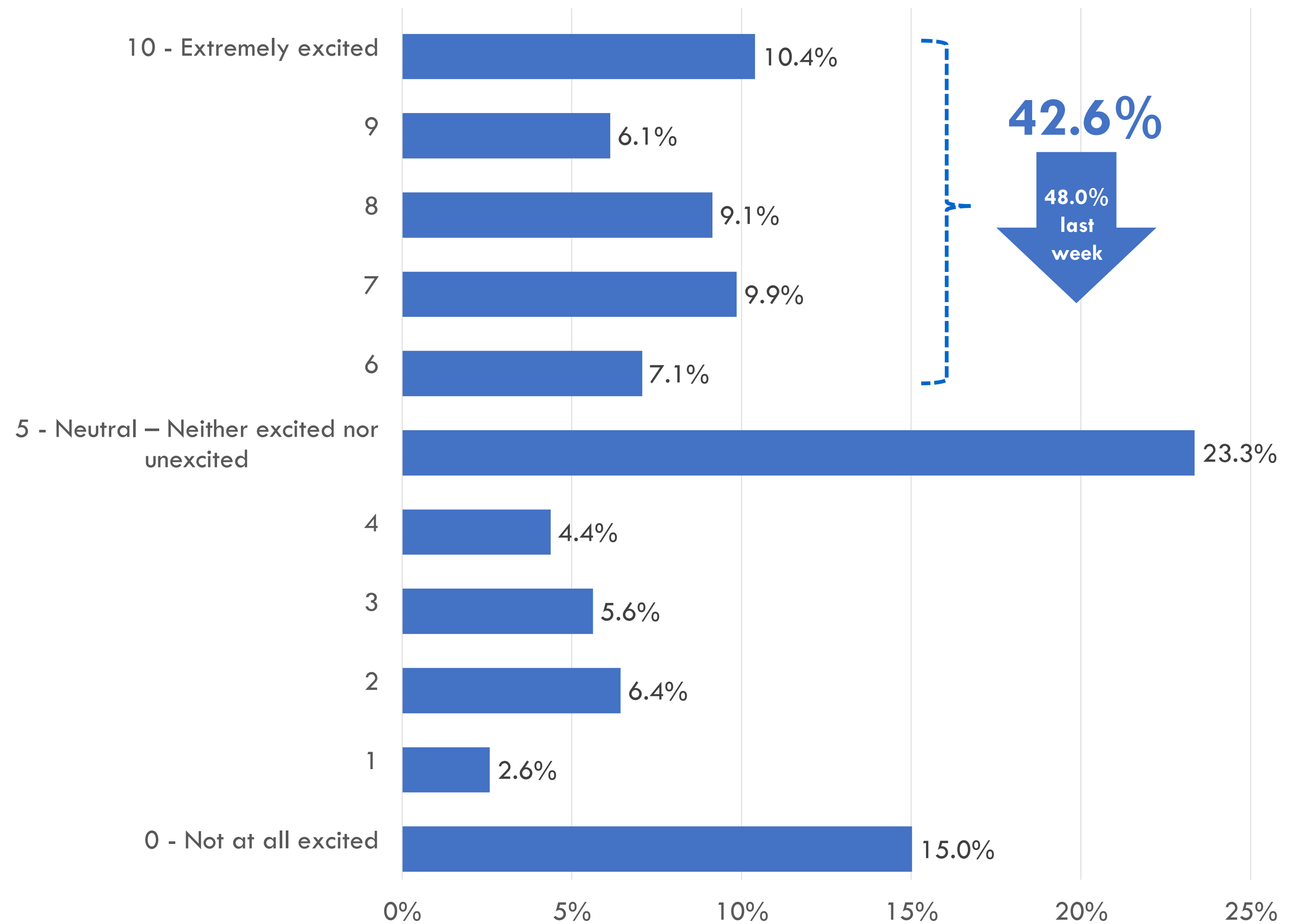
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Openness to Travel Information

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

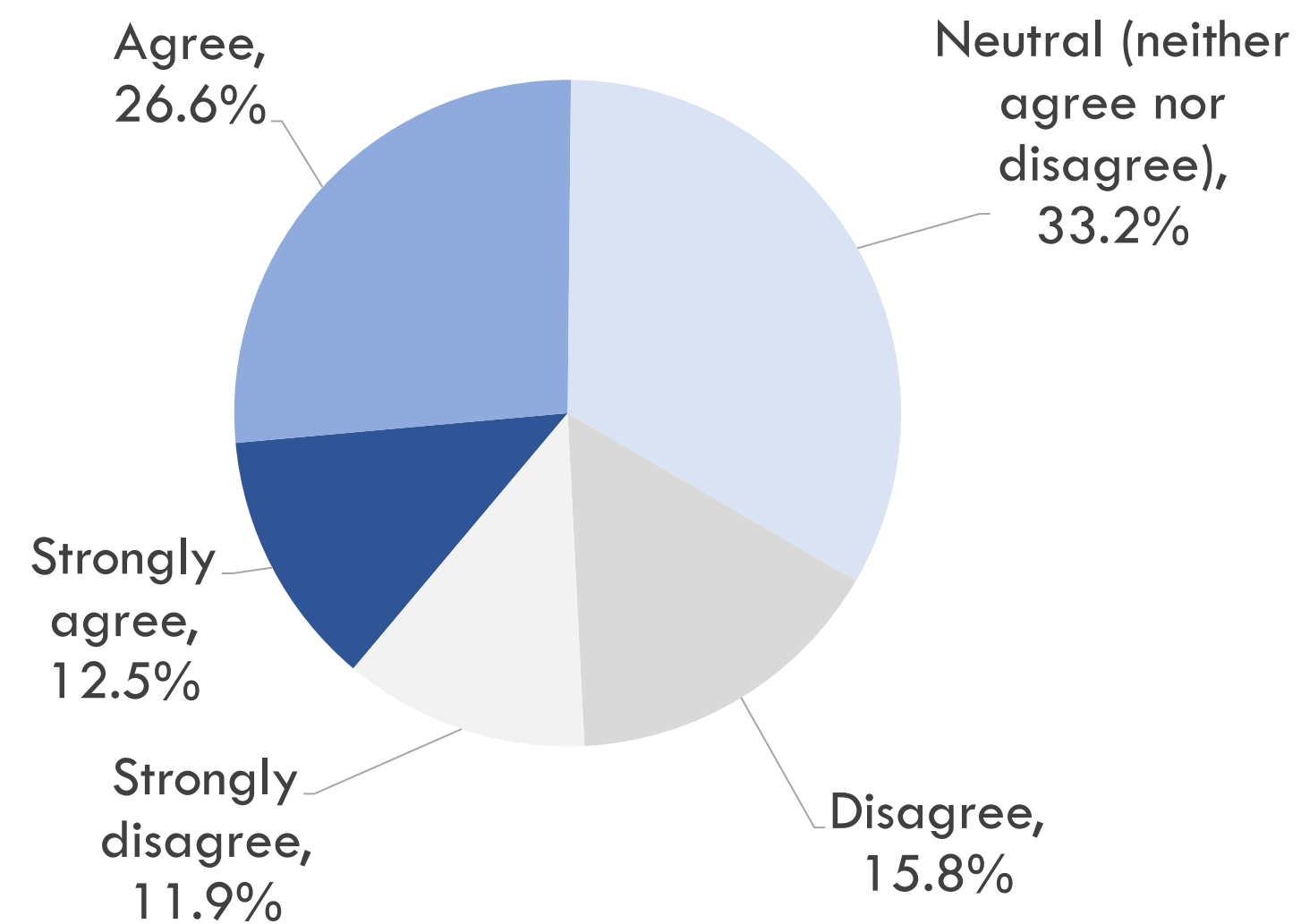
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Discounts and Price Cuts

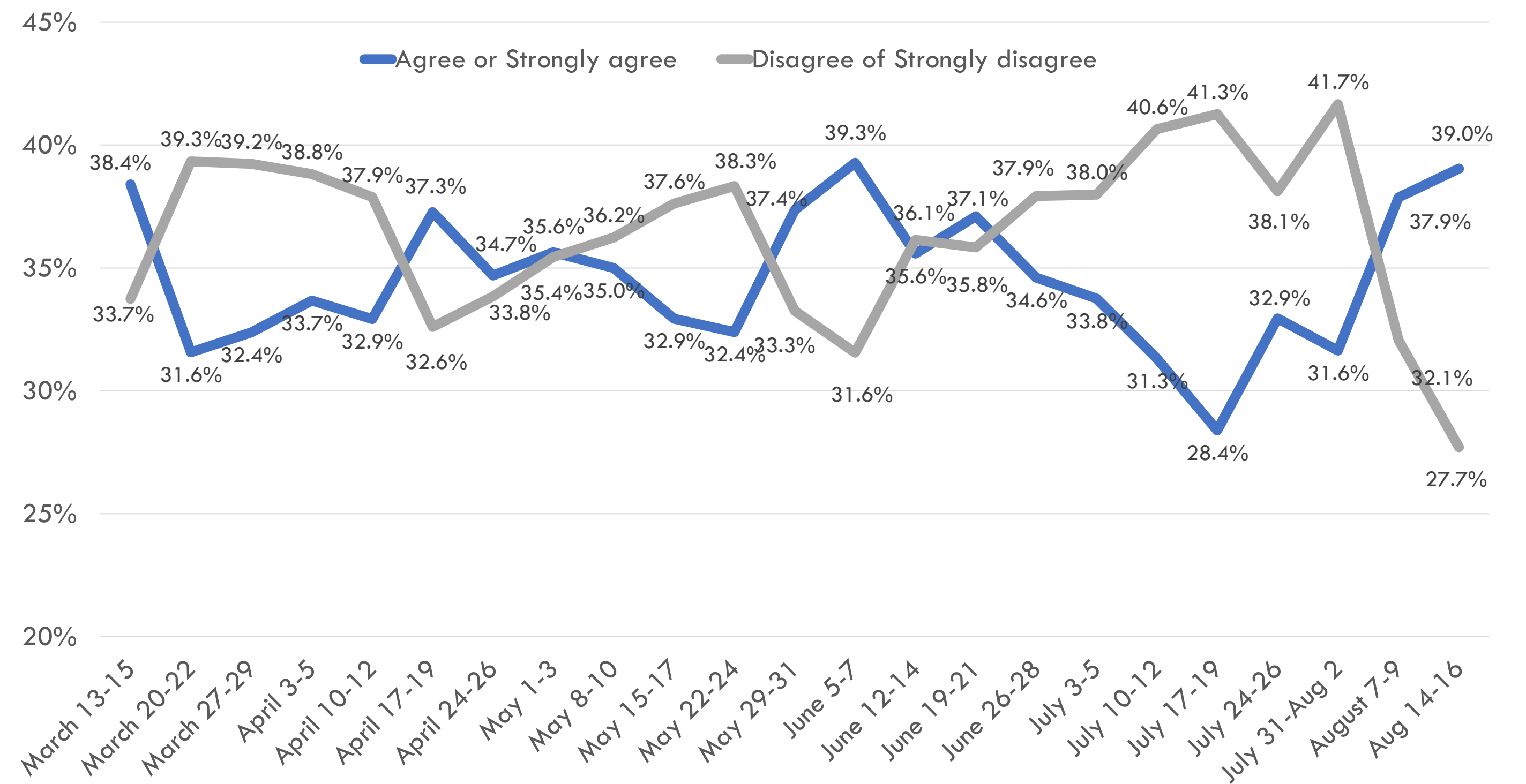
How much do you agree with the following statement?

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.



(Base: Waves 1-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

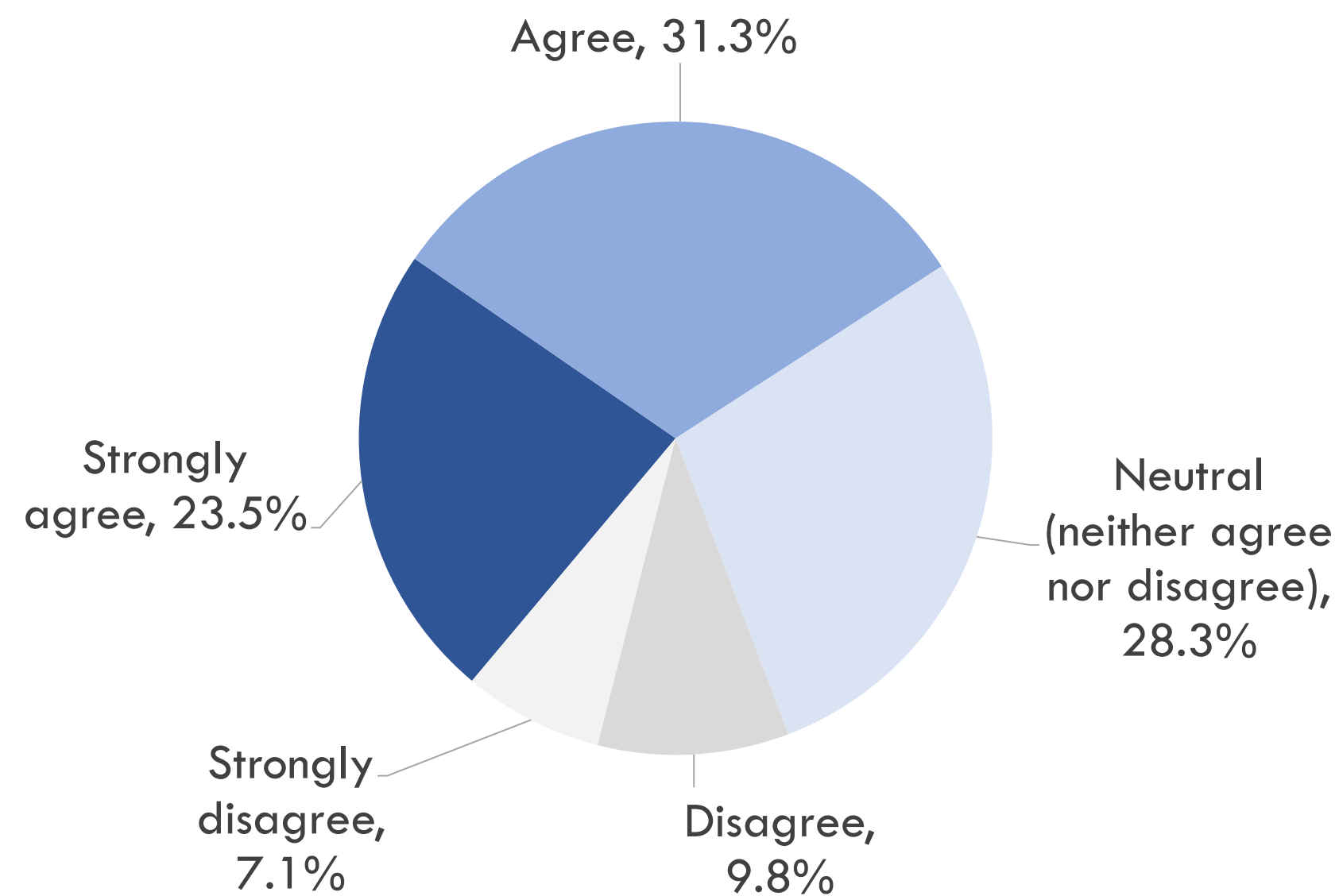
Historical data



Staycations as a Replacement for Vacations

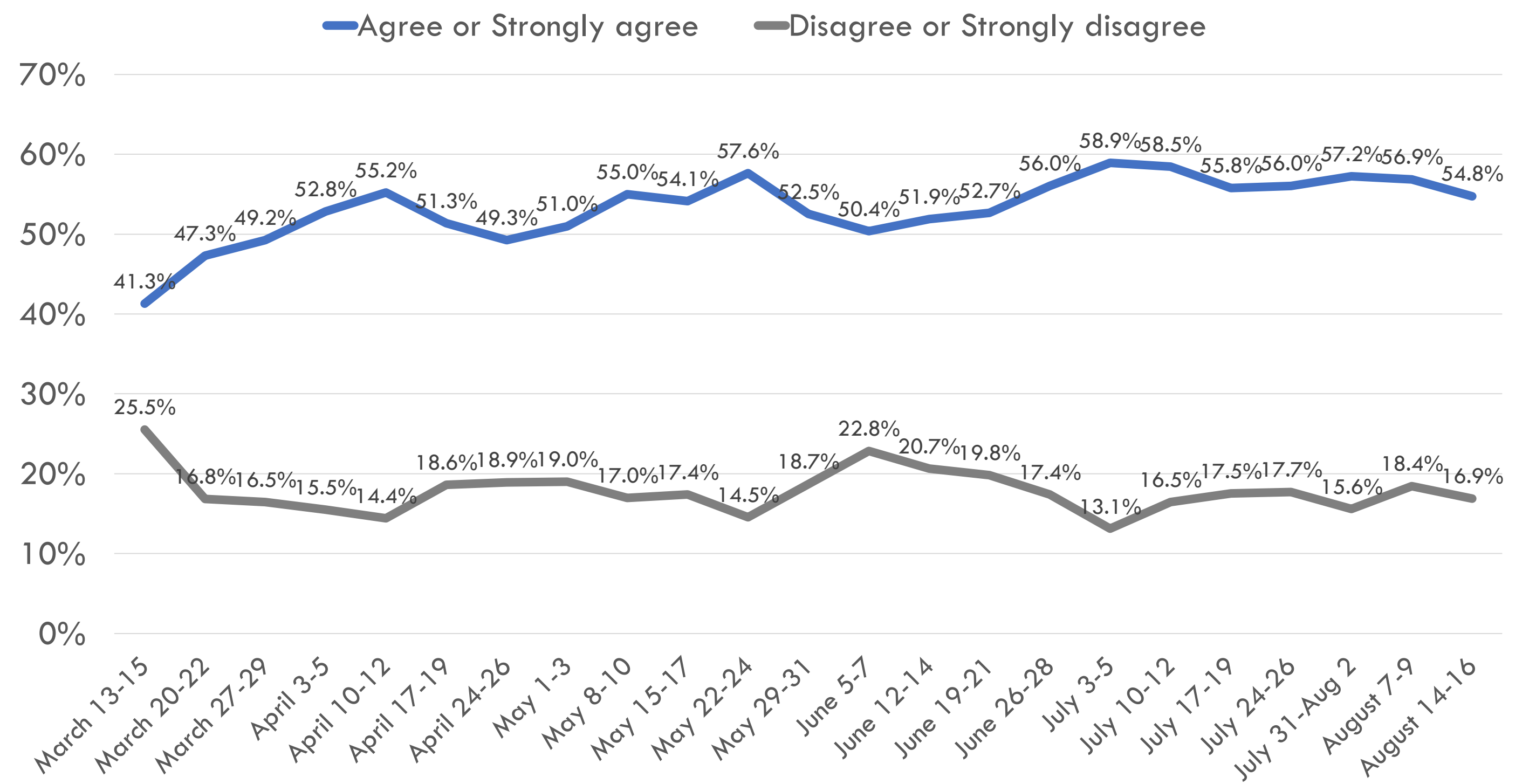
How much do you agree with the following statement?

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



(Base: Waves 1-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

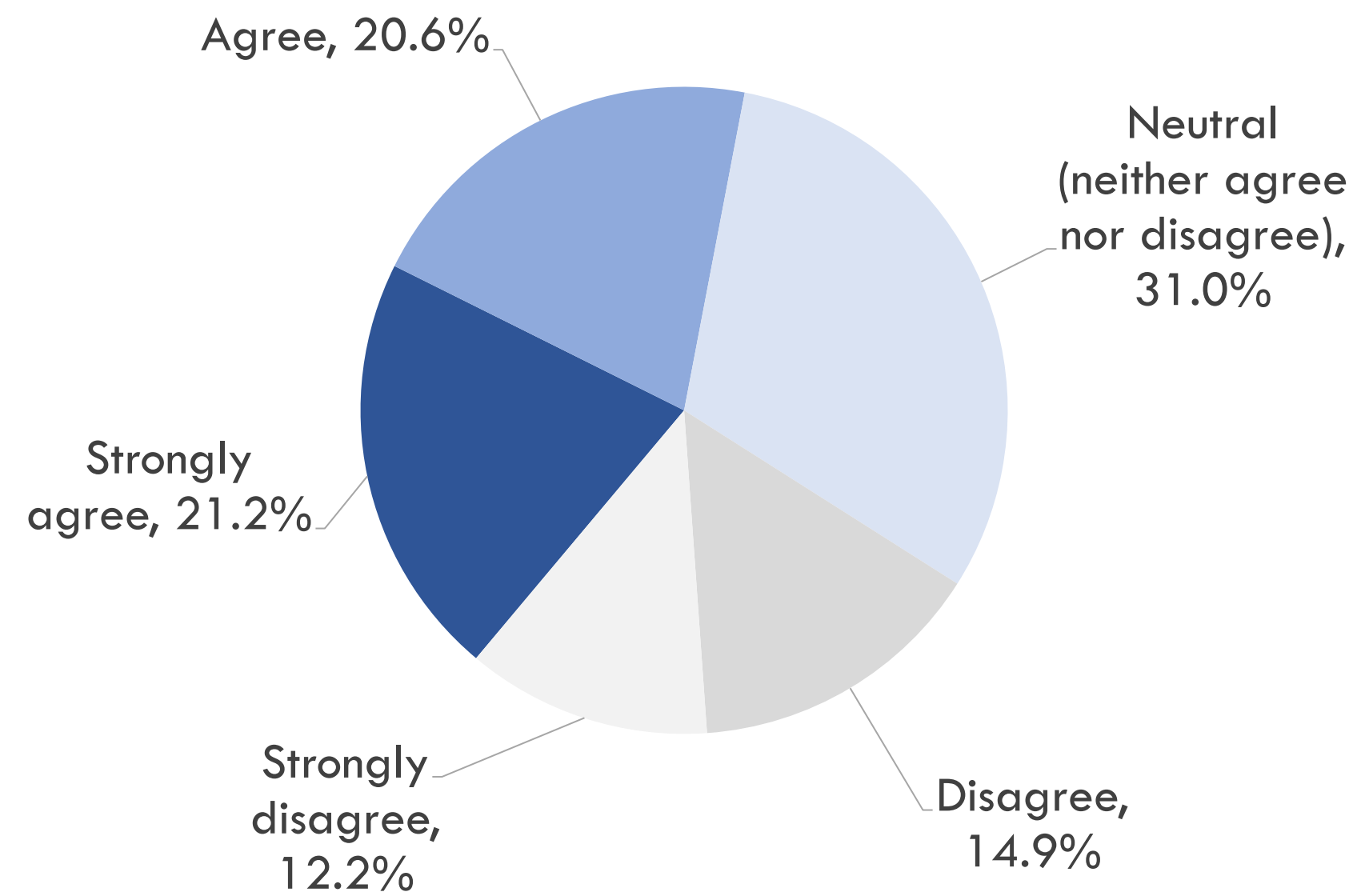
Historical data



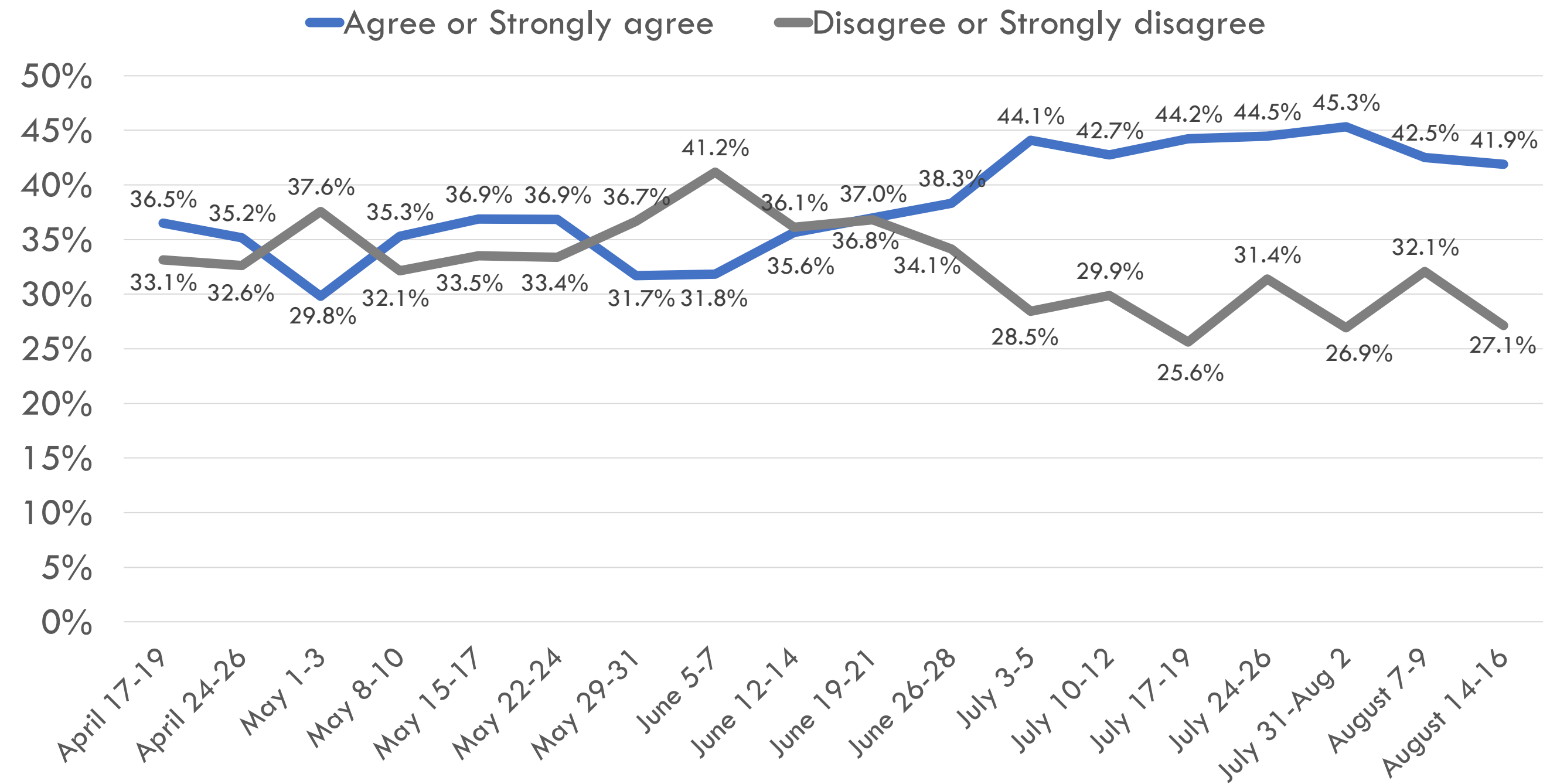
Won't Travel Without Vaccine

How much do you agree with the following statement?

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



Historical data

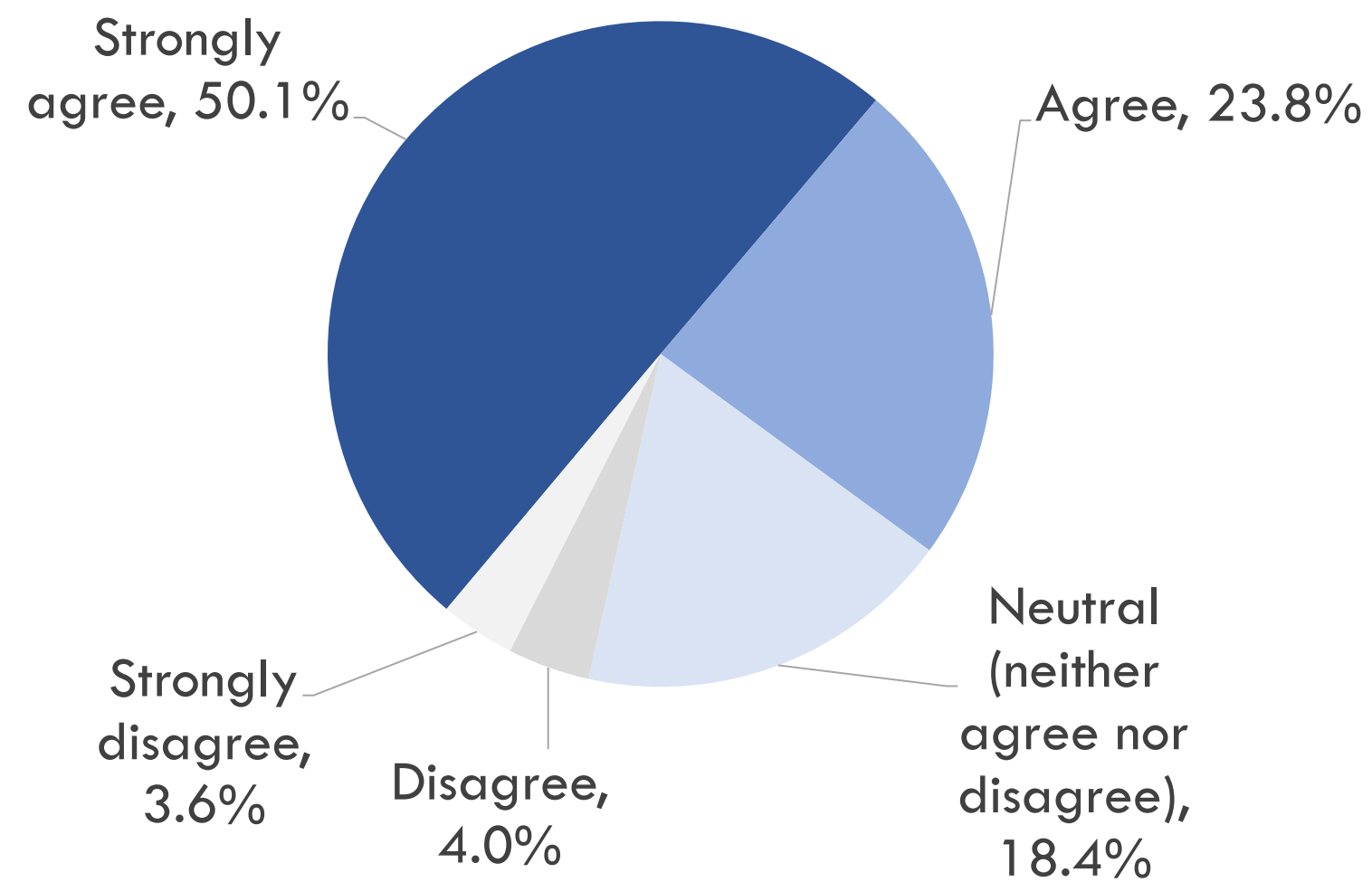


(Base: Waves 6-23. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

Avoiding Conventions & Conferences

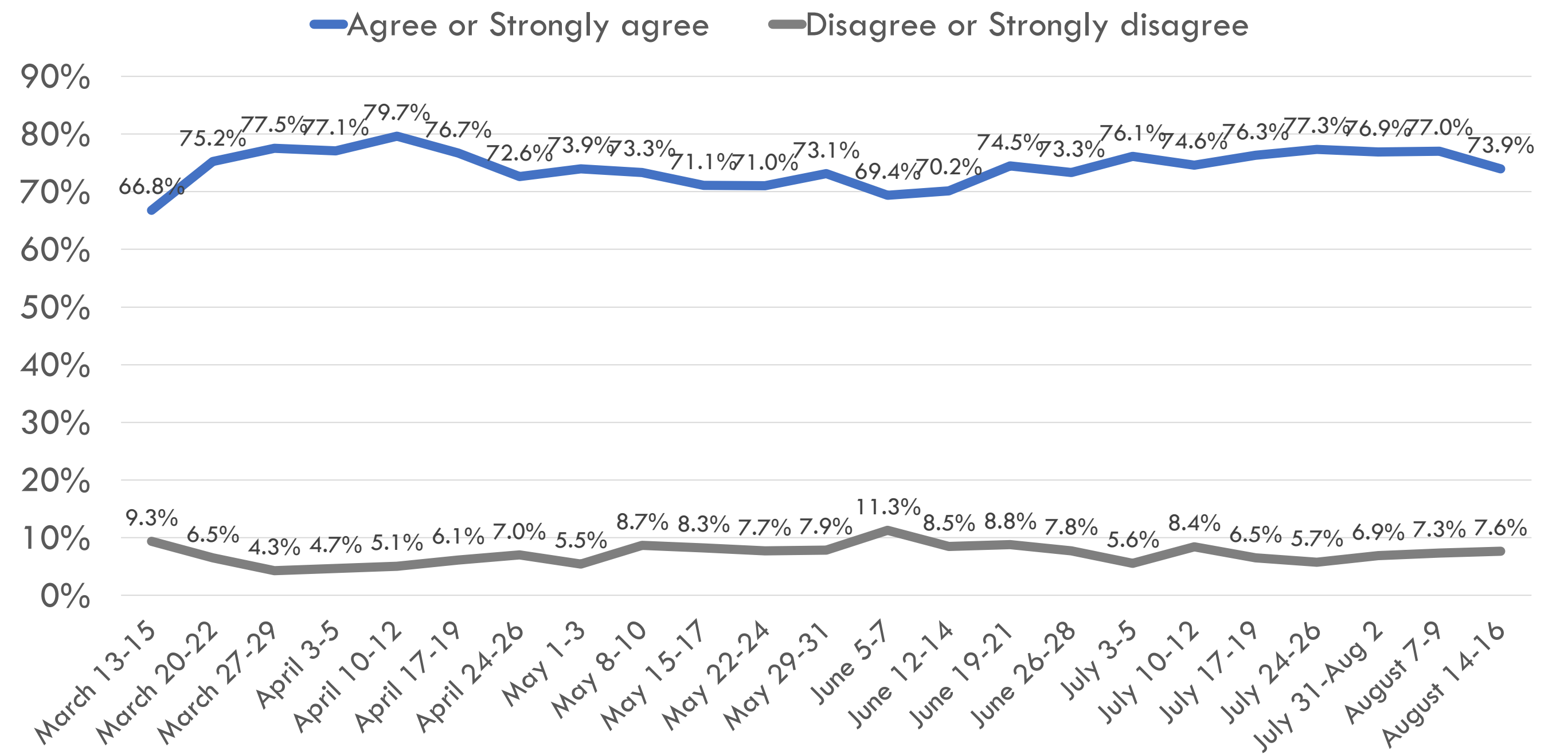
How much do you agree with the following statement?

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



(Base: Waves 1-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

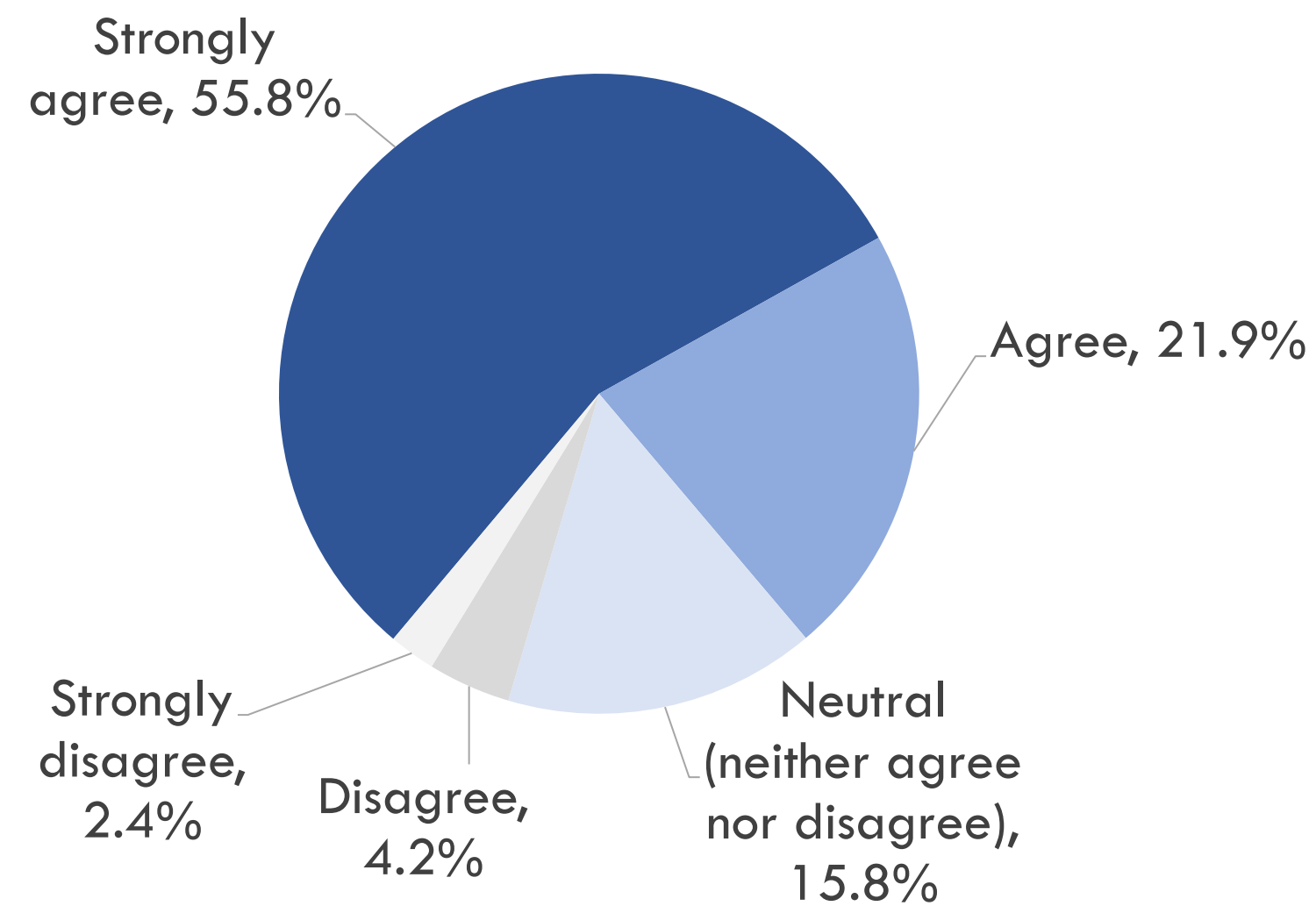
Historical data



Avoiding International Travel

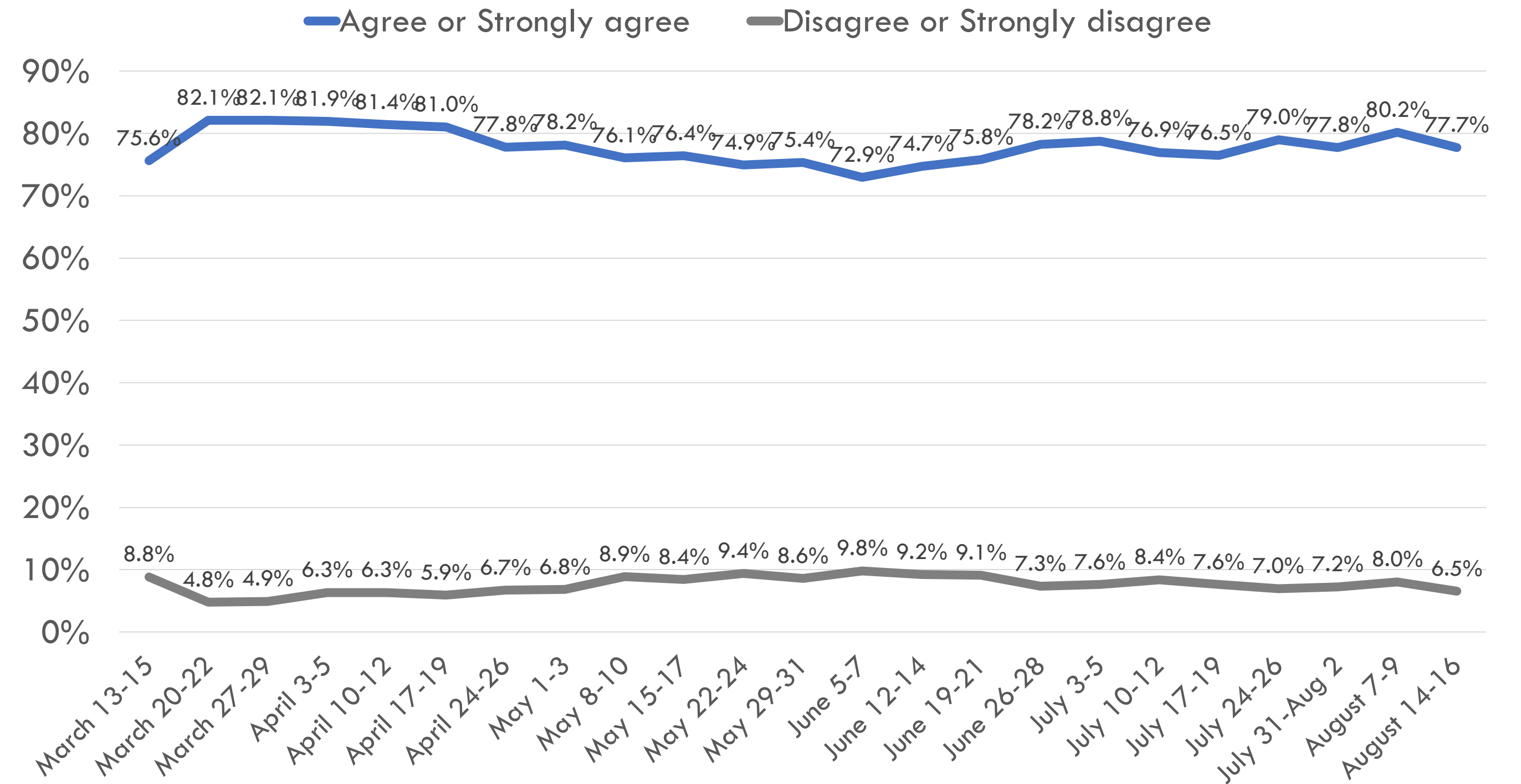
How much do you agree with the following statement?

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



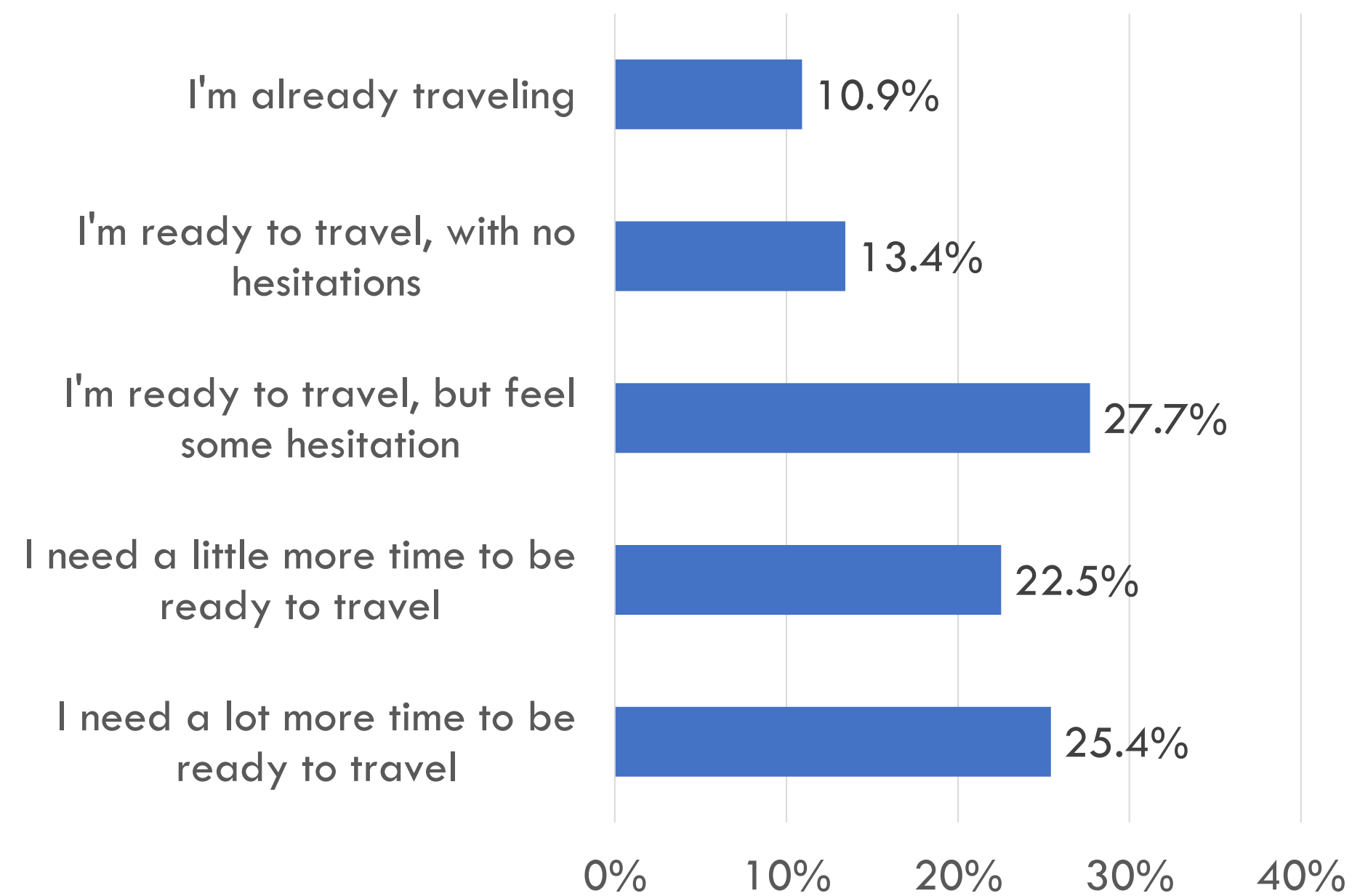
(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

Historical data

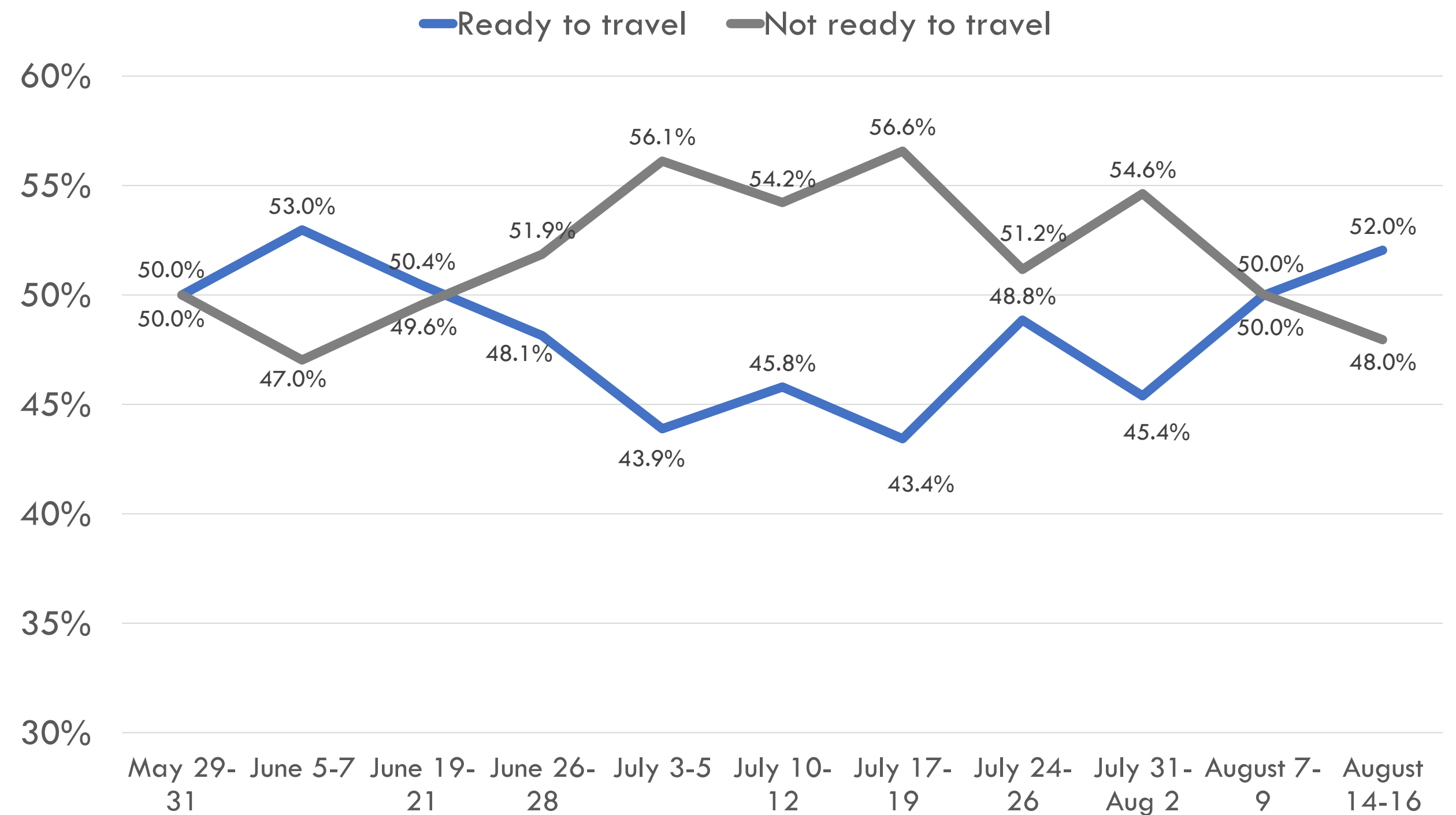


Travel State-of-Mind

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



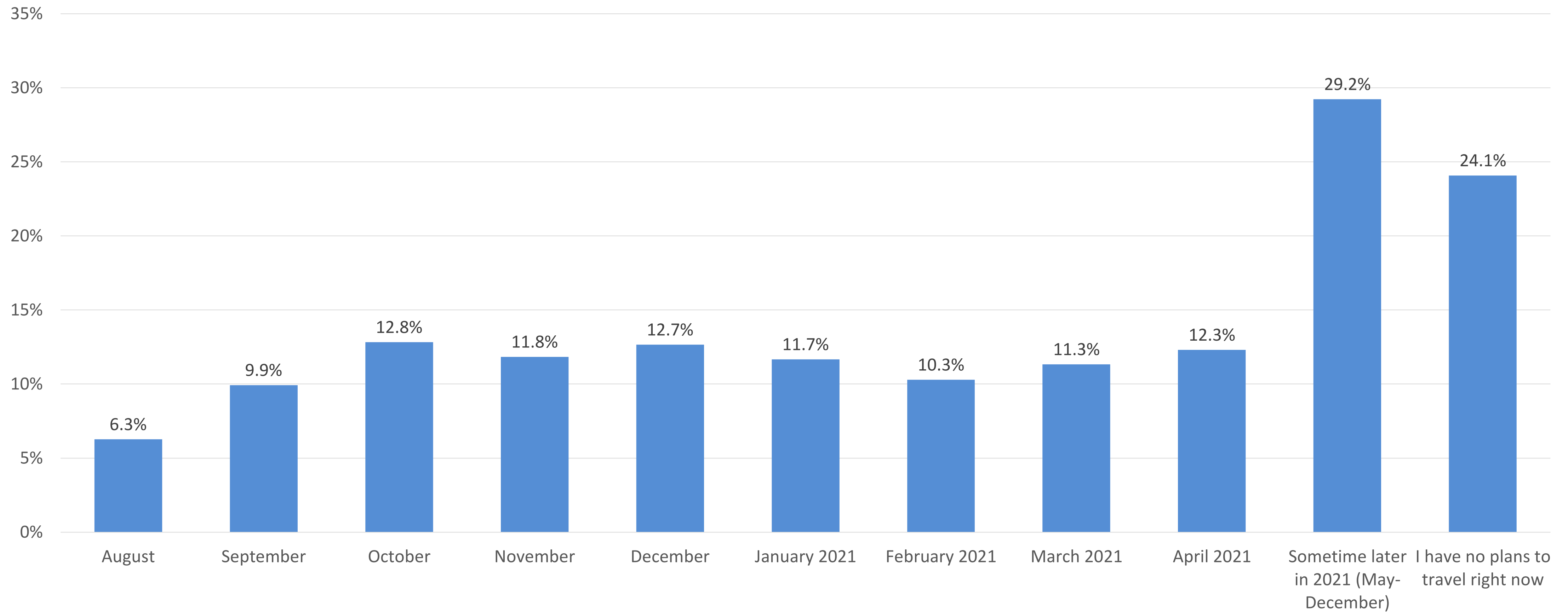
Historical data



(Base: Waves 12-13 and 15-23. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

Upcoming Travel Plans

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

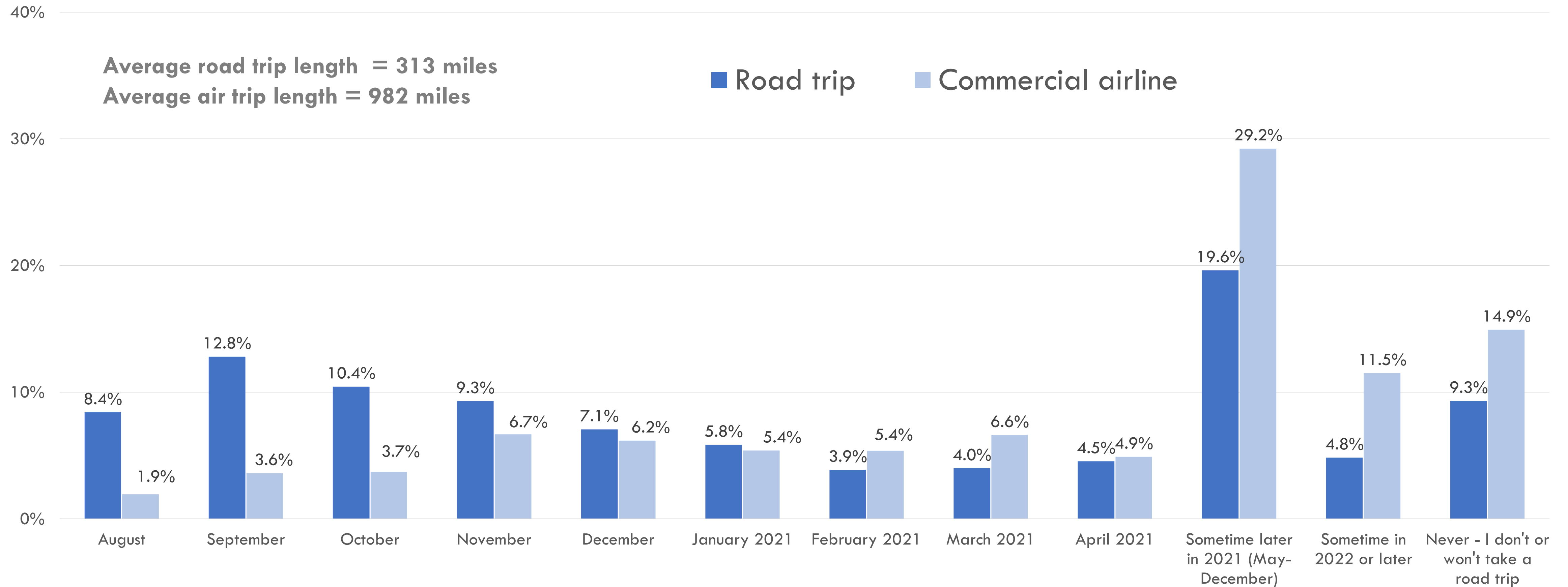


(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 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, July 31-Aug 2, Aug 7-9 and 14-16, 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?



Key Takeaways

- Increasing feelings of safety are driving more positivity about tourism both outbound and within Americans' own communities
- Safety perceptions of travel activities have improved overall, nearing June levels. Thus, the percent of Americans who report being in a "ready to travel" state of mind is now higher than those who report needing more time to feel ready
- The appeal of travel discounts and price cuts is also the highest its been since the onset of the pandemic, matching enthusiasm back on June 8th when optimism for the coronavirus situation improving was at its highest
- Looking out to 2021, three-quarters of Americans have at least tentative trip plans right now. Just 24% say they have no plans to travel through 2021



A woman in a tan coat and hat walking away on a path in an autumn forest, carrying a large tan bag. The scene is bathed in warm, golden light, suggesting a sunny day in fall. The path is lined with trees whose leaves are turning yellow and orange. The woman is seen from behind, her hand resting on her hat. She is carrying a large, structured tan bag with two buckles. The overall mood is serene and nostalgic.

**What is the Fall travel season
looking like?**

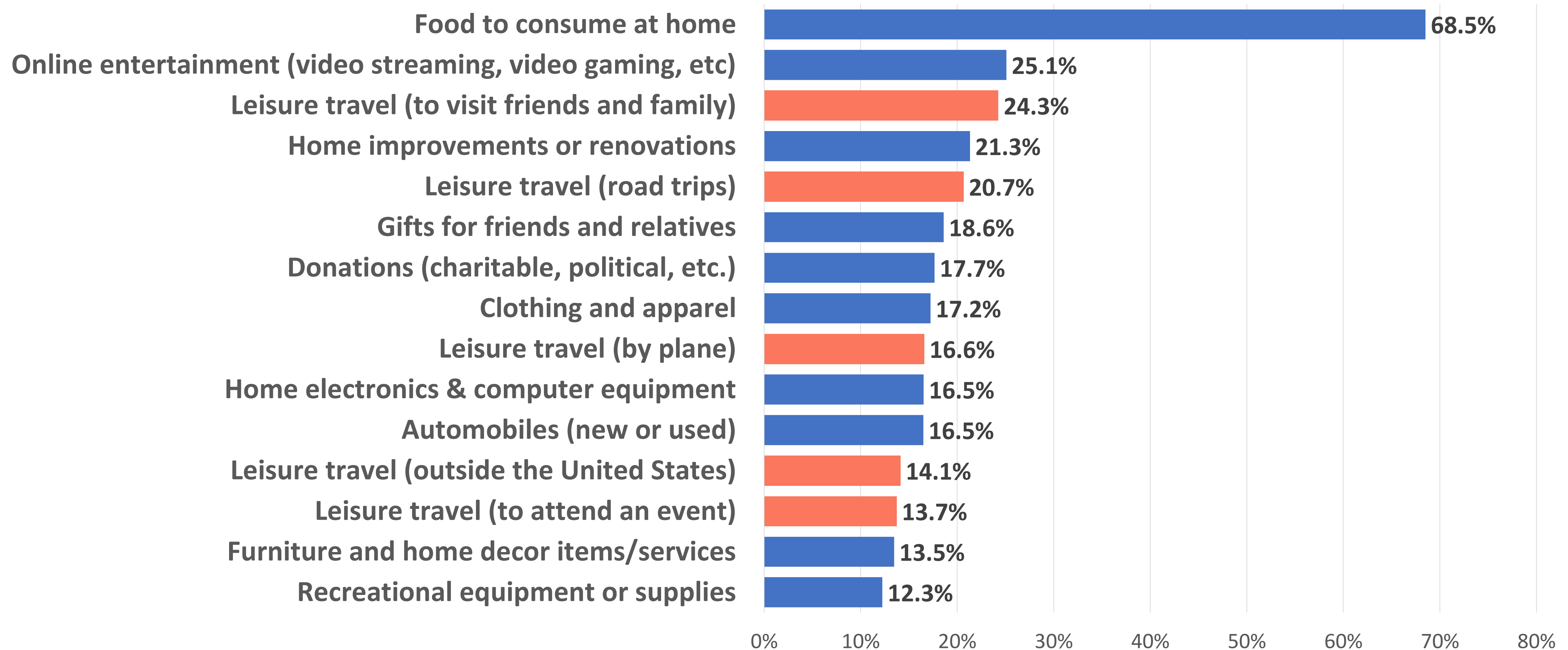
**Question: Tell us about
your spending priorities.**

**However you personally
define each, use the scale
provided to indicate how
you will prioritize these in
the next three (3) months.**



Spending Priorities

Top 2 Box Score: Essential Priority or High Priority



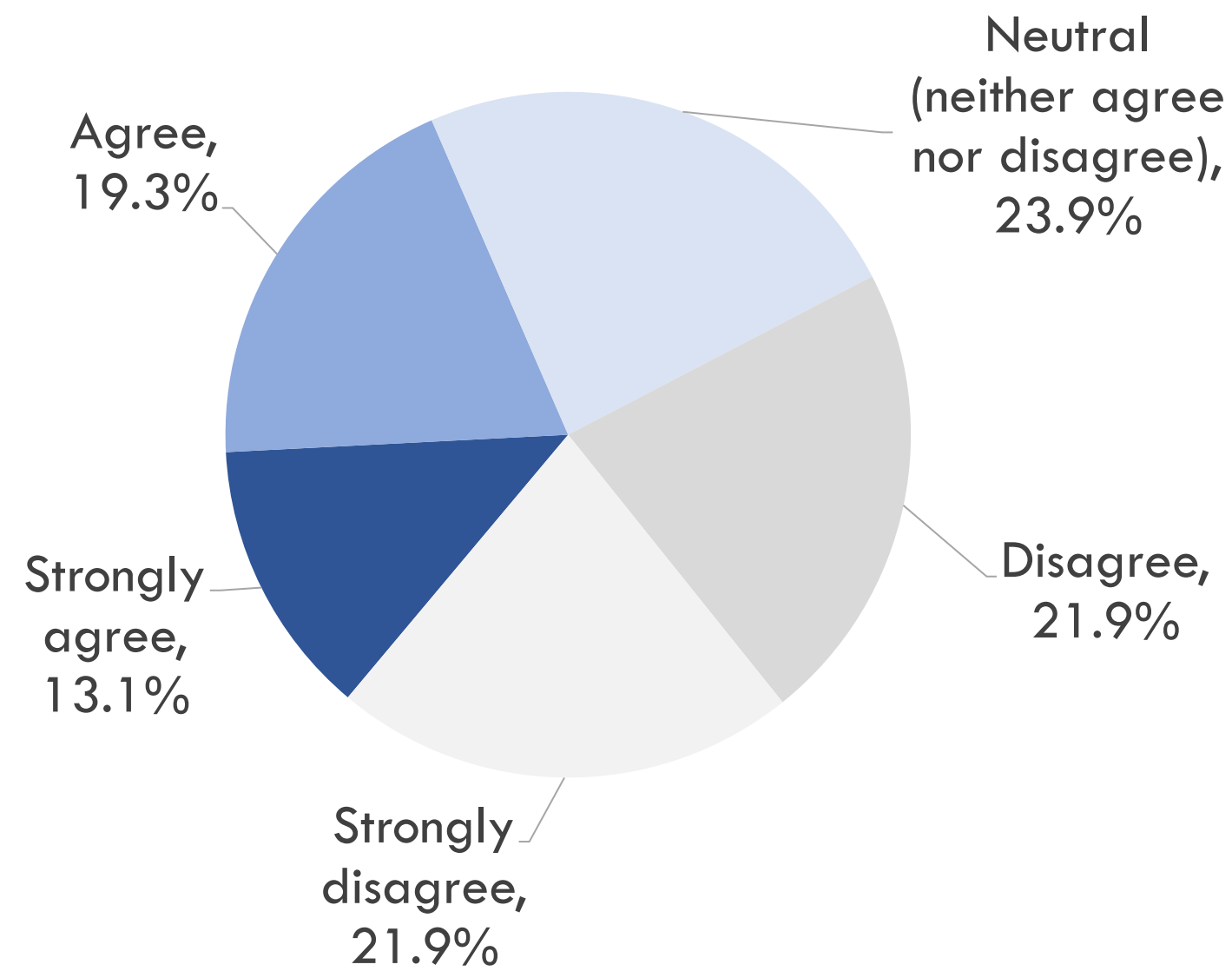
Question: Tell us about your spending priorities. However you personally define each, use the scale provided to indicate how you will prioritize these in the next

THREE (3) MONTHS. (Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

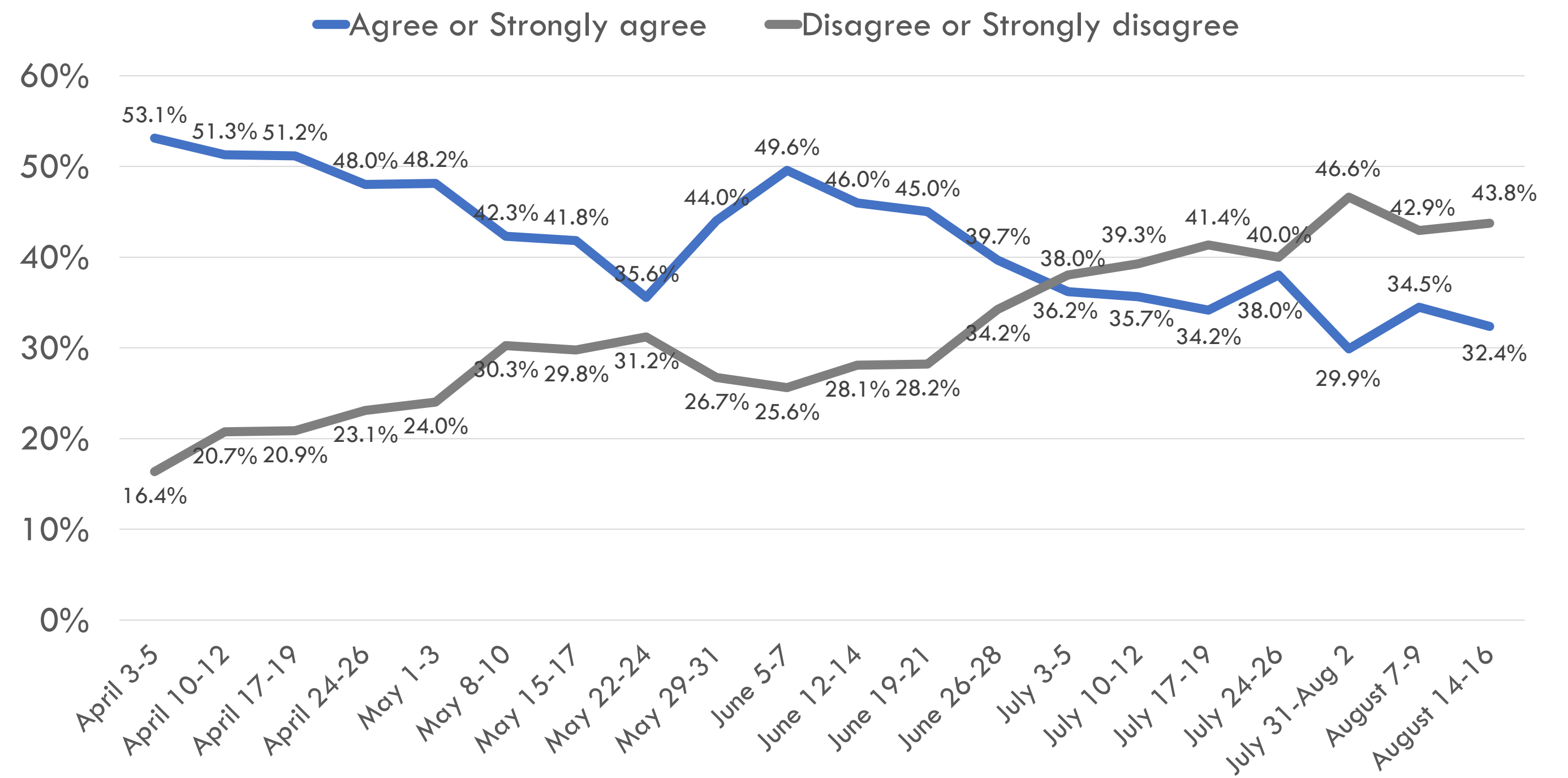
Expectations for Traveling in the Fall

How much do you agree with the following statement?

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

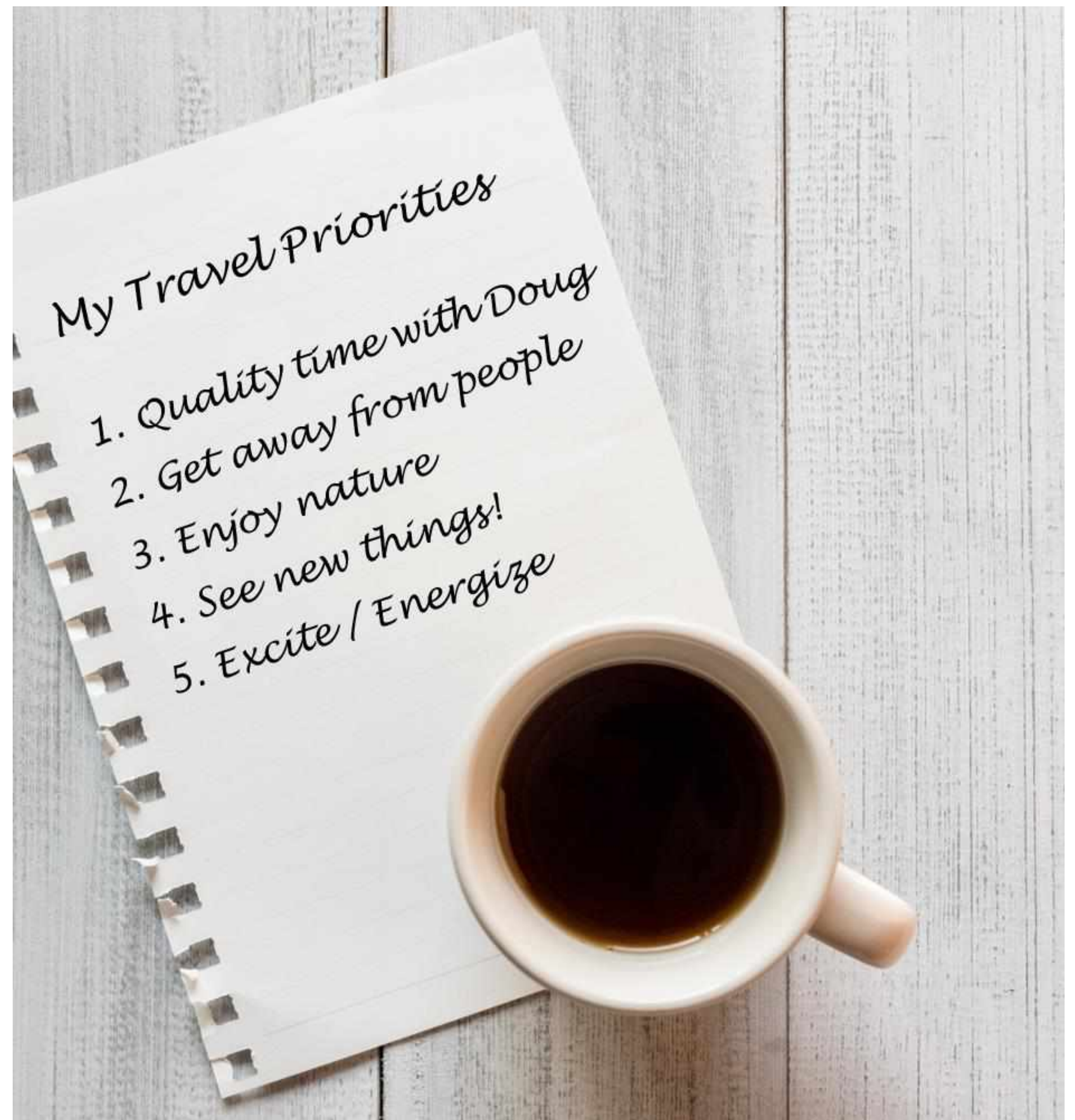


Historical data



(Base: Waves 4-23. 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, 1,224, 1,201 and 1,202 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, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

Question:
Thinking about
your travel during
the rest of the
year, what travel
experiences will
you prioritize?



My Travel Priorities

- 1. Quality time with Doug*
- 2. Get away from people*
- 3. Enjoy nature*
- 4. See new things!*
- 5. Excite / Energize*

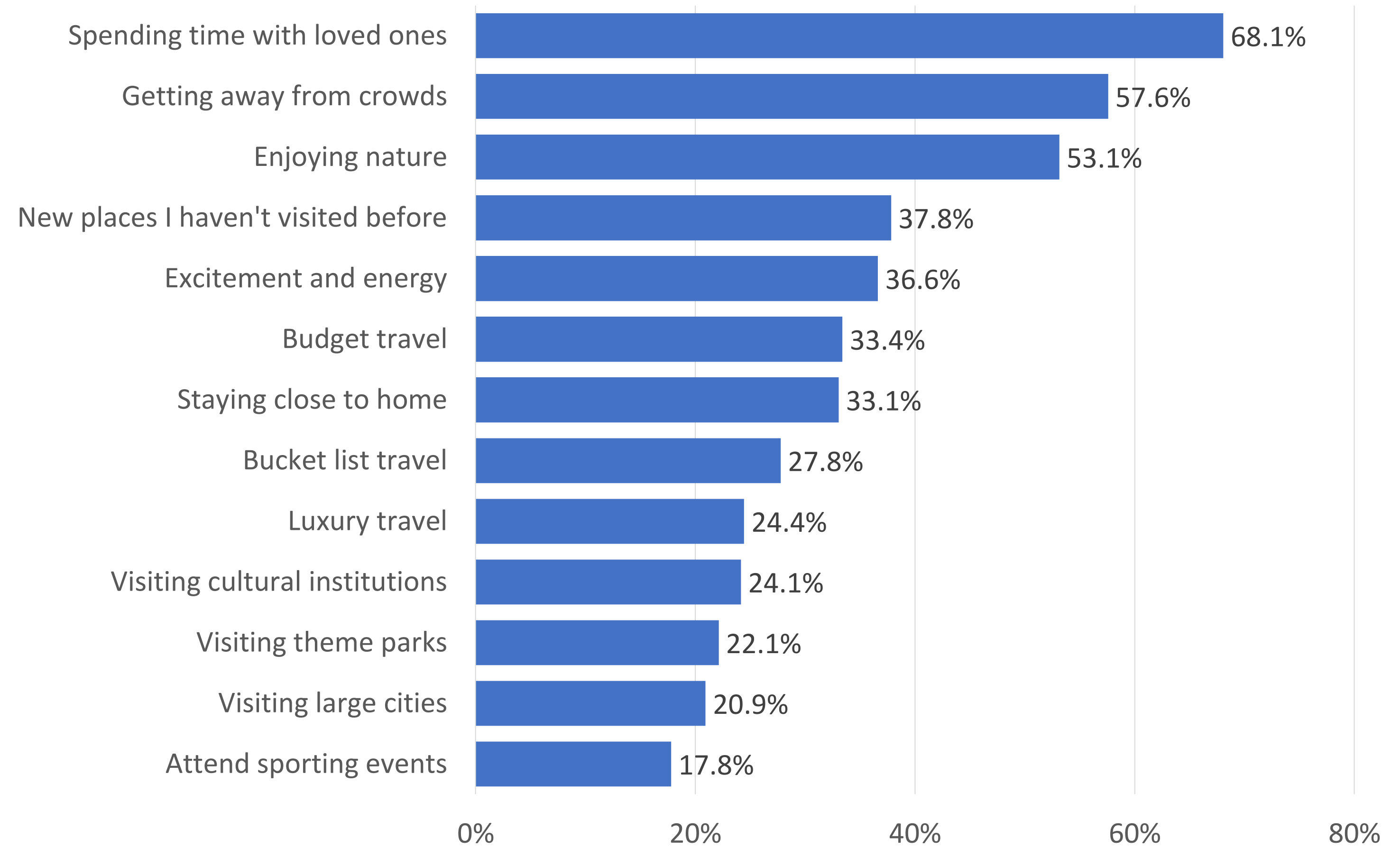
Travel Experiences Prioritized This Year

Question: Thinking about your travel during the rest of the year, what travel experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: Wave 23 data. Respondents planning to travel for leisure later in 2020, 432 completed surveys. Data collected Aug 14-16, 2020)

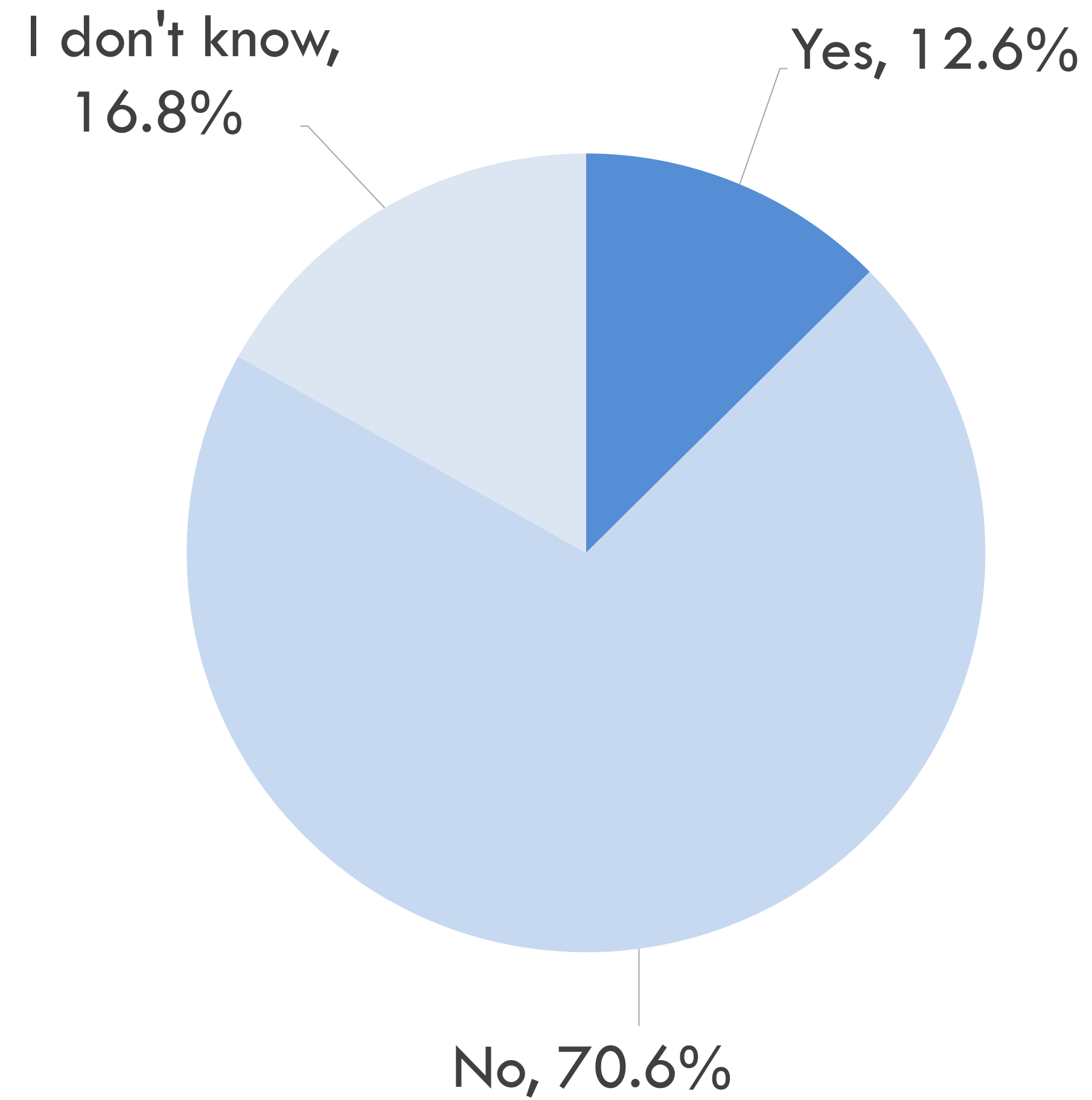
Top 2 Box Score: Essential Priority or High Priority



Expected Travel: Labor Day

Questions: Will you be traveling for leisure over the Labor Day weekend this year?

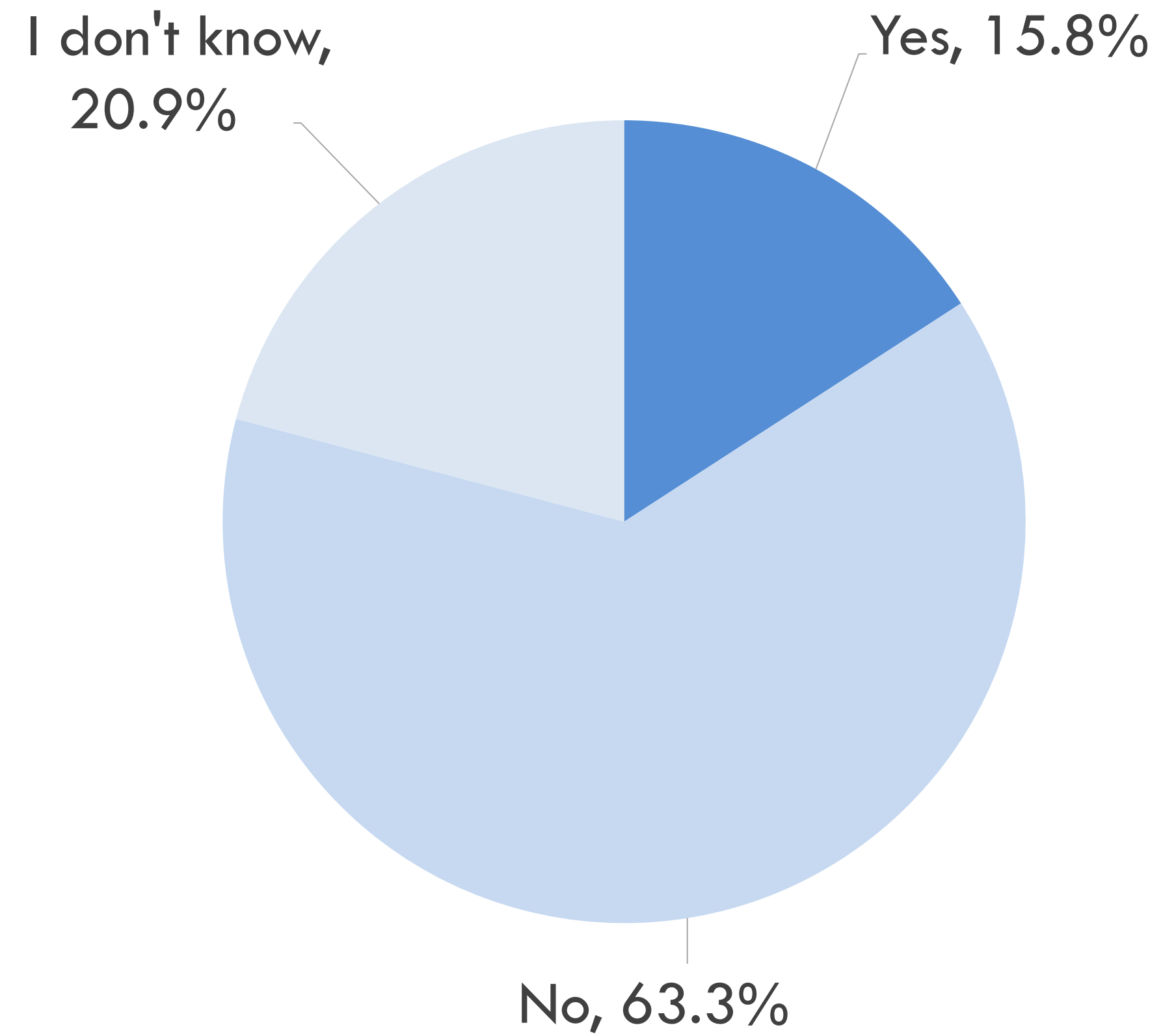
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Expected Travel: Thanksgiving

Questions: Will you be traveling over the Thanksgiving Holiday this year?

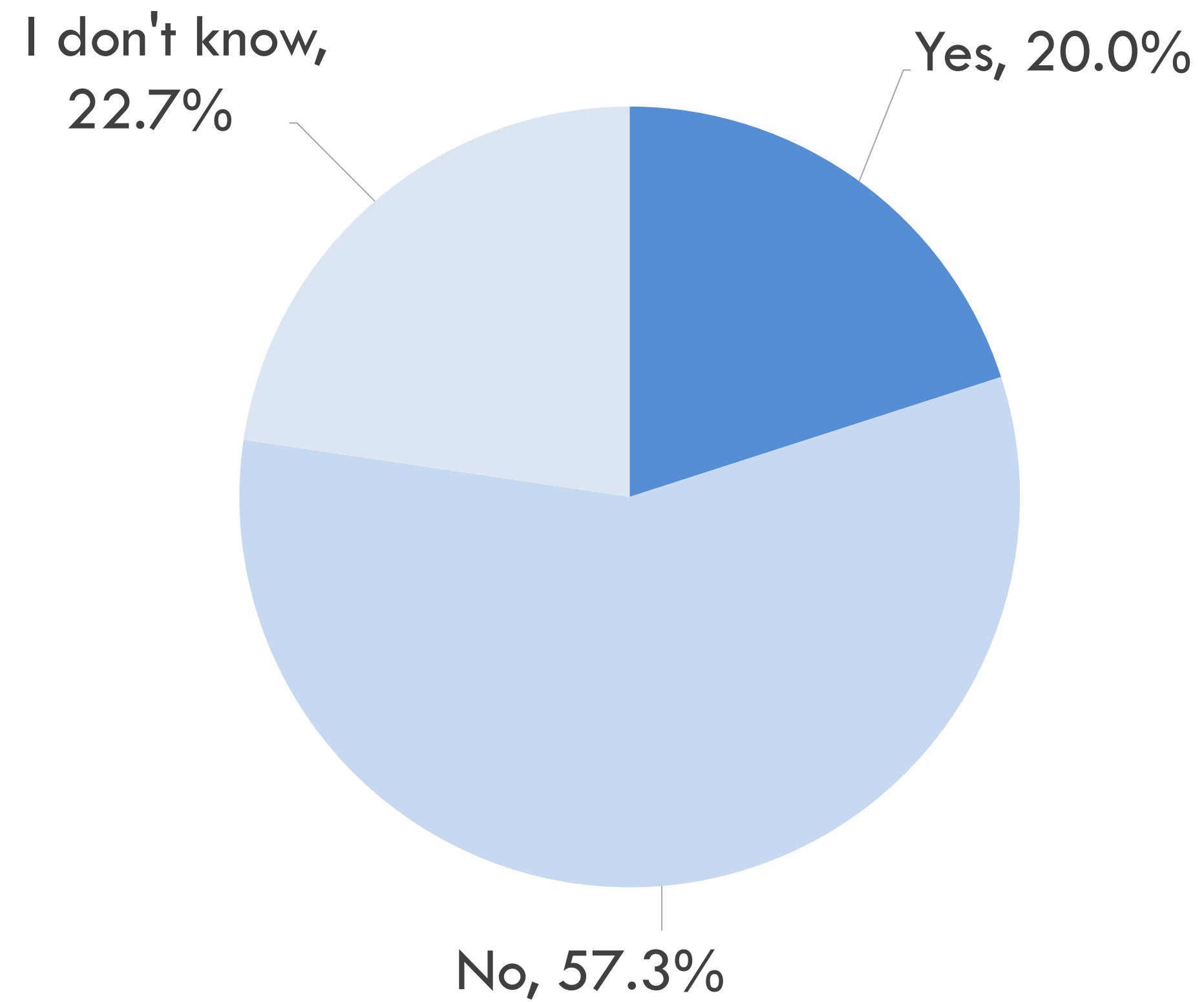
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Expected Travel: Christmas

Questions: Will you be traveling over the Christmas Holiday this year?

(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Key Takeaways

- Travel is being prioritized in entertainment and leisure spending
- Those with trip plans for the remainder of the year are commonly prioritizing getting away from crowds and enjoying nature in addition to spending time with loved ones
- However, there is also an important proportion who are prioritizing experiencing new places and excitement in their travel
- As Americans look out over upcoming holidays, there is a gradual expectation to travel for these occasions



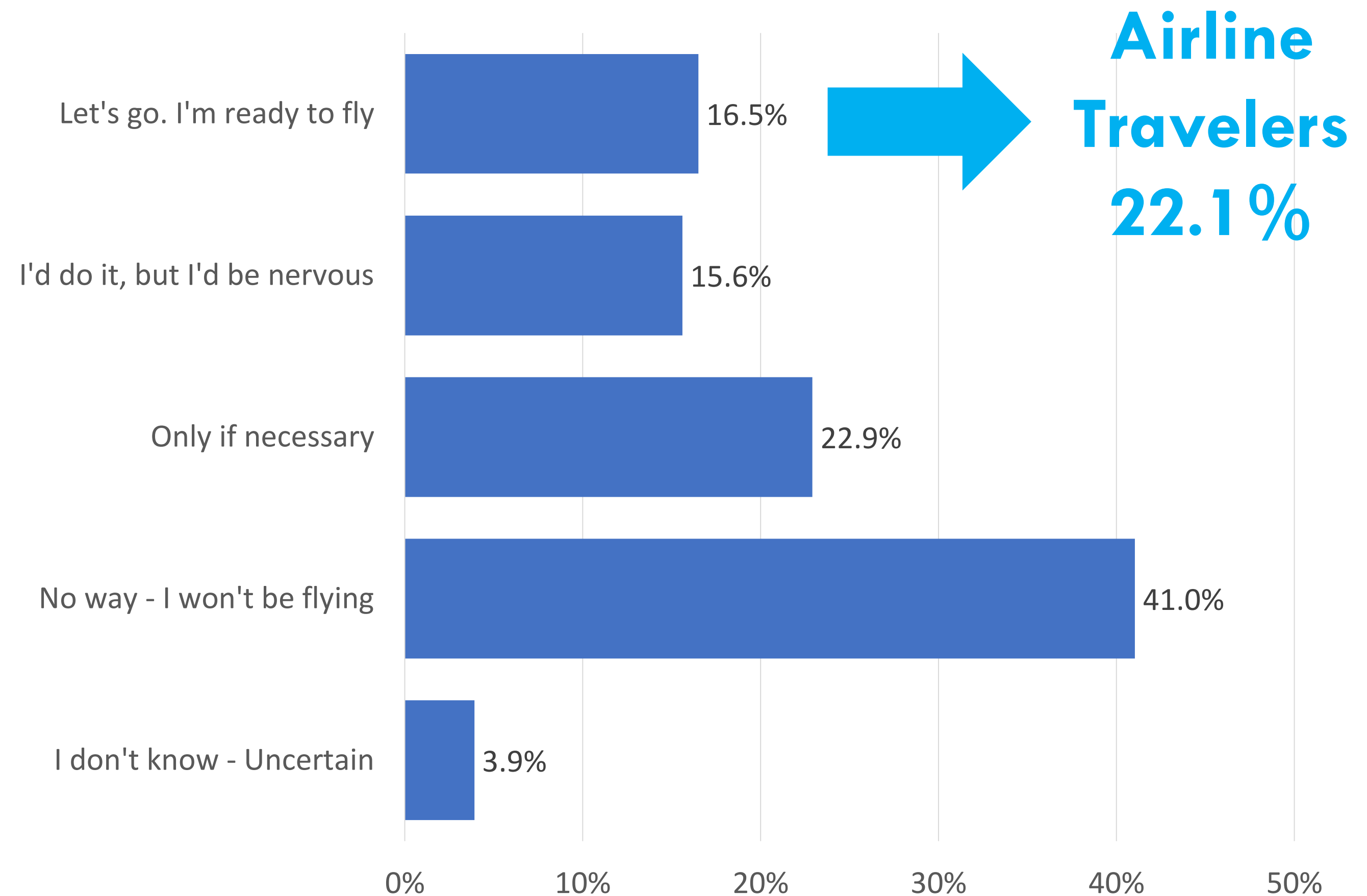
Opinions on Flights and Airports

A woman with long brown hair, wearing a light blue surgical face mask, a long brown coat over a light-colored button-down shirt, blue jeans, and white sneakers, stands in an airport terminal. She is holding a bright yellow rolling suitcase with her right hand and a small red passport or travel document in her left. The background is a blurred airport interior with a red stanchion line, a white wall with a large 'X' shape, and a ceiling with recessed lighting. The overall atmosphere is clean and modern.

Feelings About Direct Flights

Question: Which best describes how you would feel about taking a **DIRECT FLIGHT** on a commercial airline in the next month?

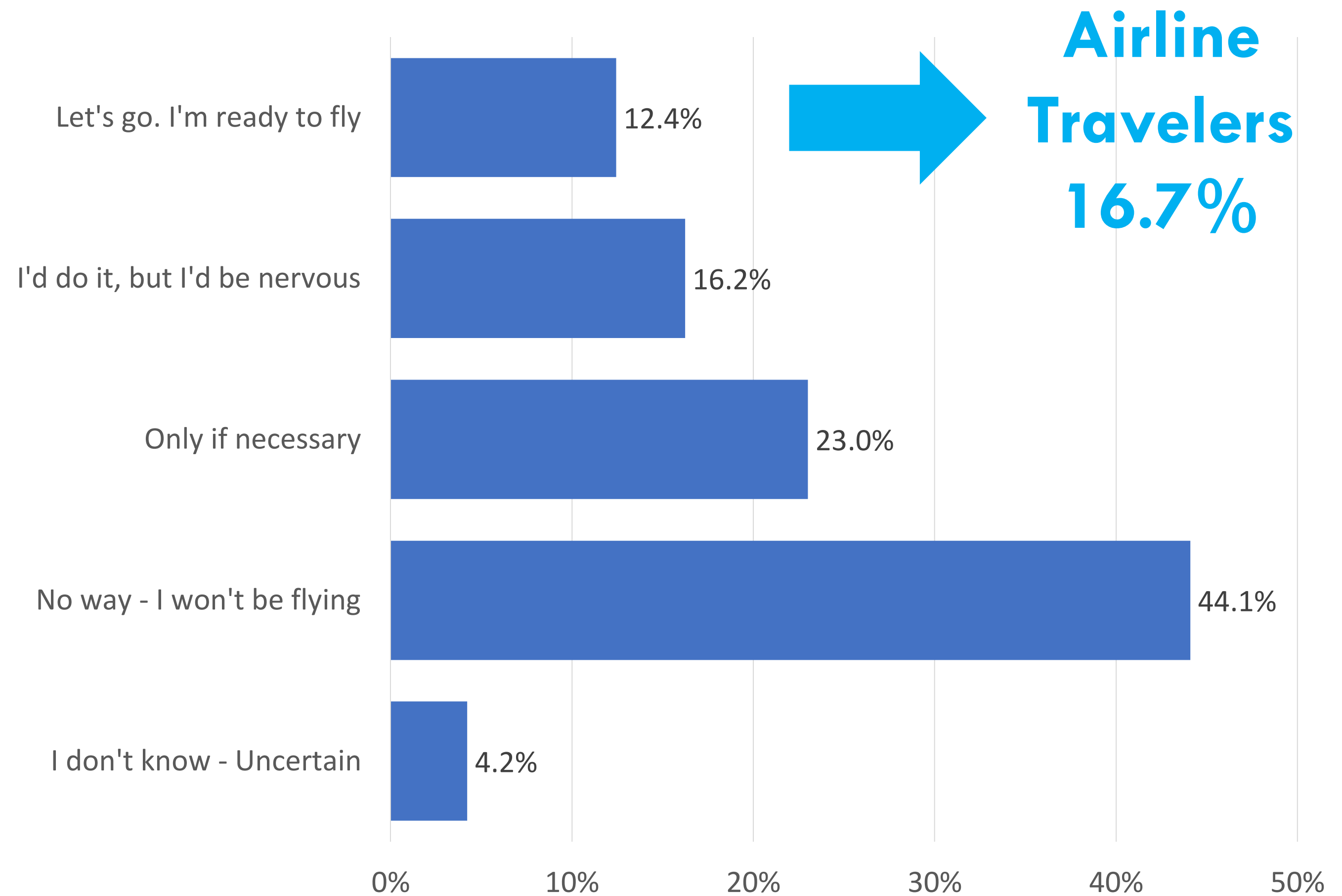
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Feelings About Connecting Flights

Question: Which best describes how you would feel about taking a **FLIGHT THAT REQUIRED CONNECTIONS** on a commercial airline in the next month?

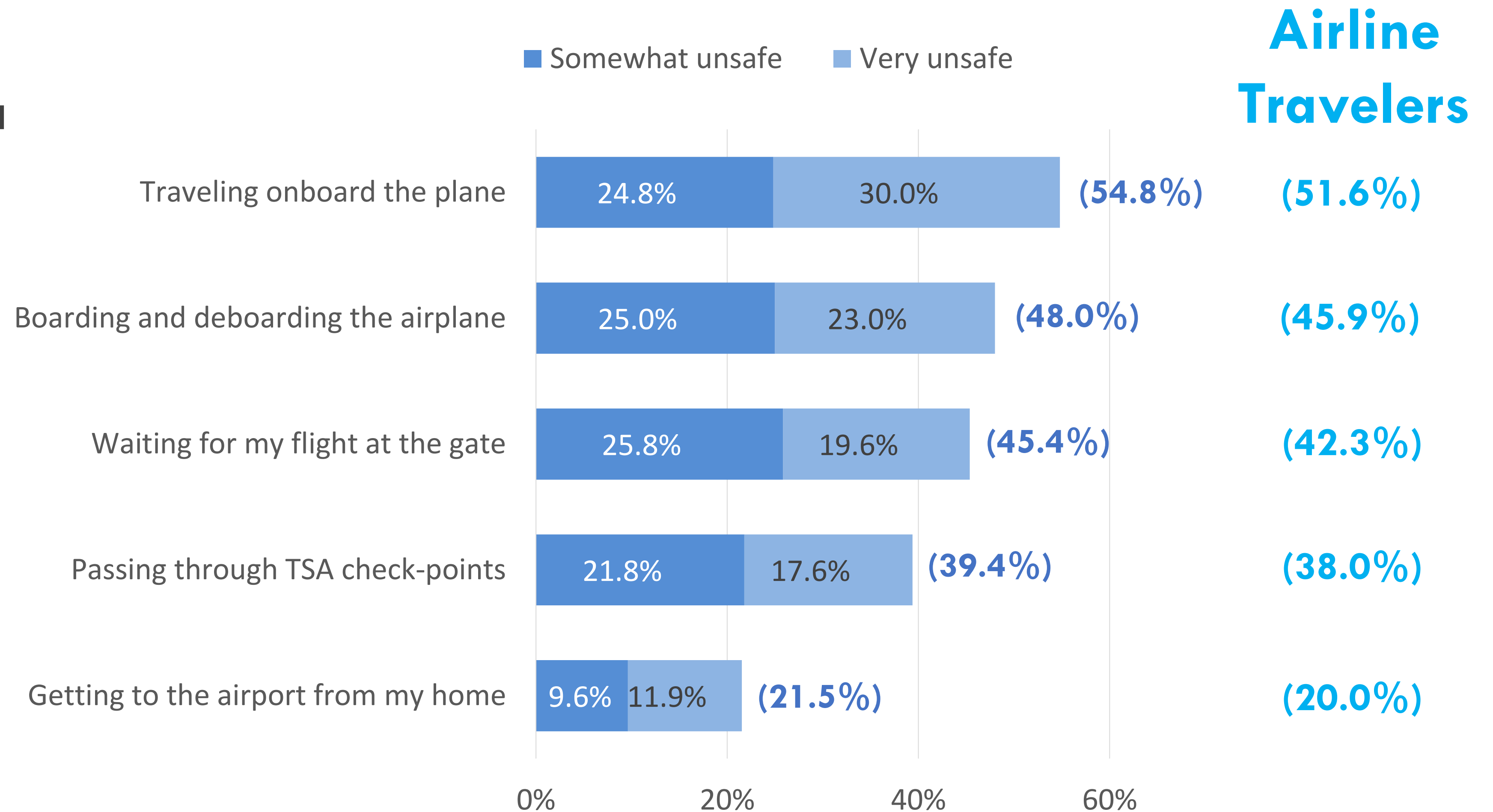
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



Safety of Flight-related Activities

Question: How would you rate the safety of each step you would take in traveling by commercial airline?

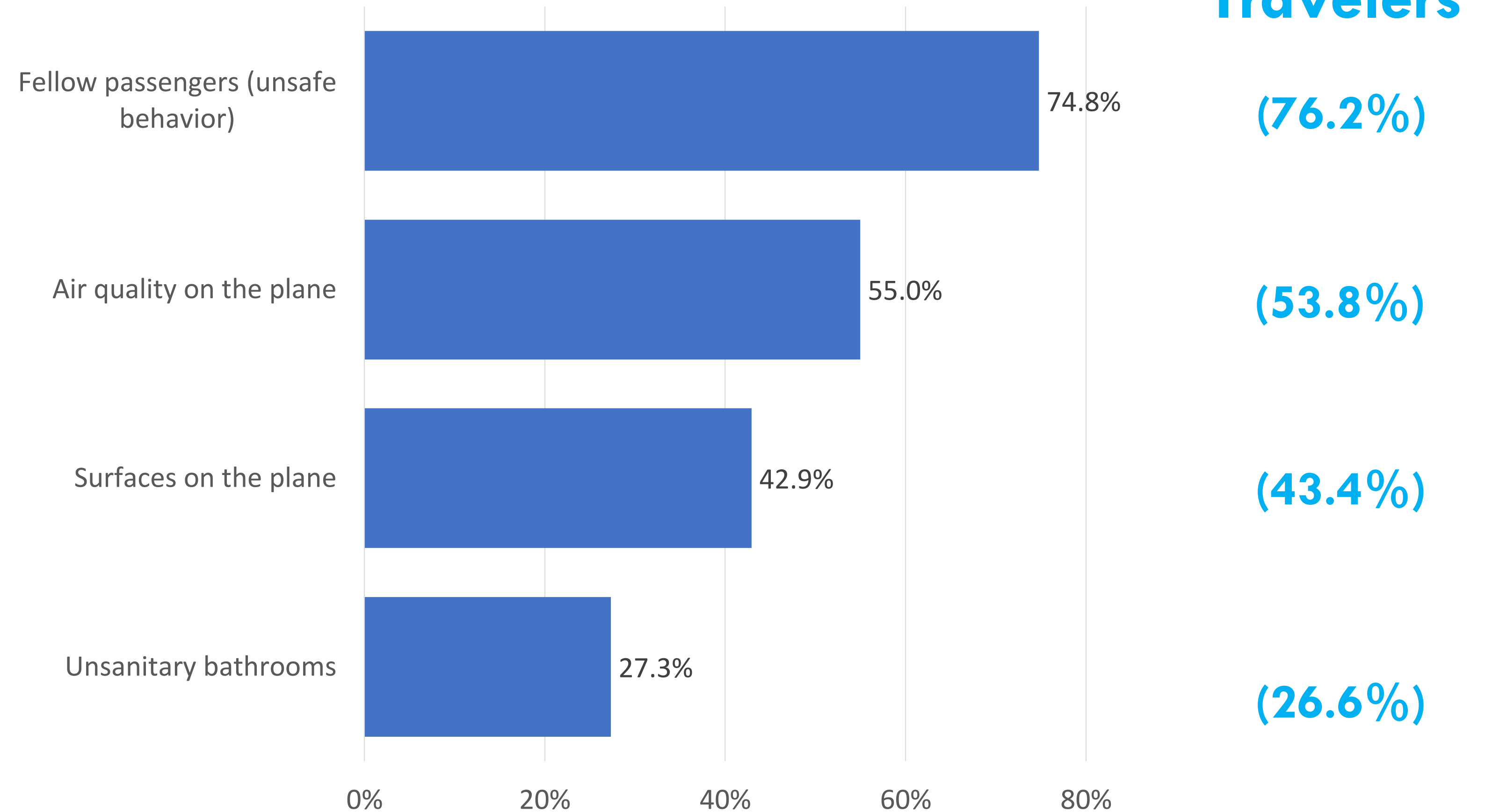
(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



In-Flight Safety

Question: Please rank what you would consider to be the **TWO MOST UNSAFE ASPECTS** of traveling on a plane?

(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)



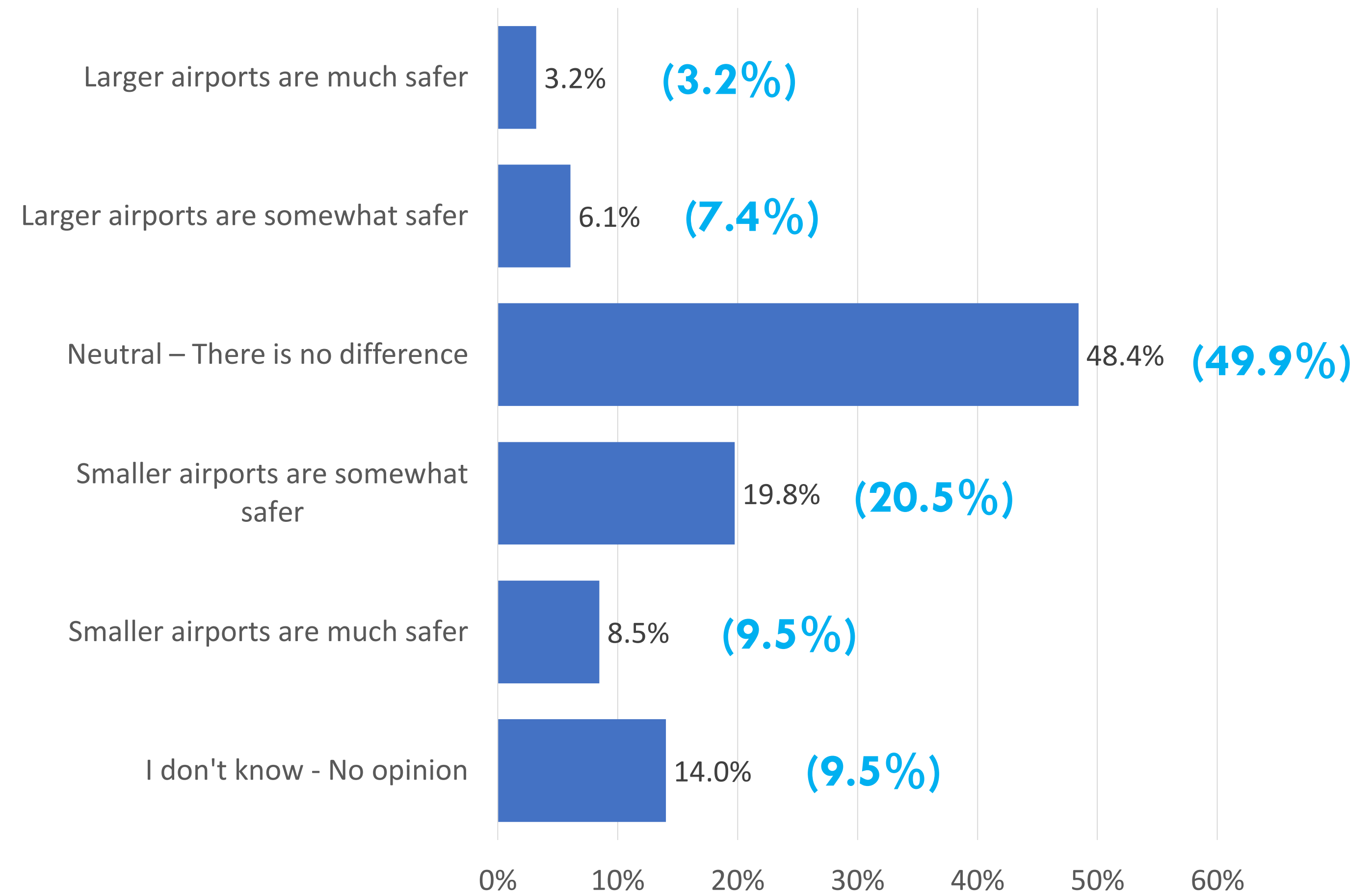
Feelings About Airport Size

Question: Please think about the two different types of domestic airports:

- **Larger airports:** These are more heavily trafficked airports like Chicago O'Hare, Los Angeles International (LAX) or Hartsfield-Jackson Atlanta International Airport
- **Smaller airports:** These are less trafficked airports like Santa Barbara Municipal Airport or Savannah/Hilton Head International Airport.

Thinking about safety and Coronavirus, which generally describes your feelings?

Airline Travelers



Key Takeaways

- About 30% of American travelers would be up for taking a flight in the next month, although there is somewhat more comfort with direct flights than those that require a connection
- From a health risk perspective, the flight itself is viewed as more unsafe than the airport experience, largely due to the behavior of other passengers.
- Smaller airports are considered somewhat safer than larger airports right now



A family of four is walking through a modern, glass-walled transit area. The father, wearing a yellow sweater and a white face mask, is holding the hand of the mother, who is wearing a blue and white striped shirt and a white face mask. They are both pulling rolling suitcases. The mother is pulling a teal suitcase, and the father is pulling a brown suitcase. A young girl in a striped dress and a white face mask is walking between them, holding the mother's hand. Another young girl in a light blue outfit and a white face mask is walking ahead of them. The background shows a large glass wall and a concrete structure, suggesting an airport or train station. The text "Feelings about Domestic Travel Restrictions" is overlaid in large, bold, orange letters across the center of the image.

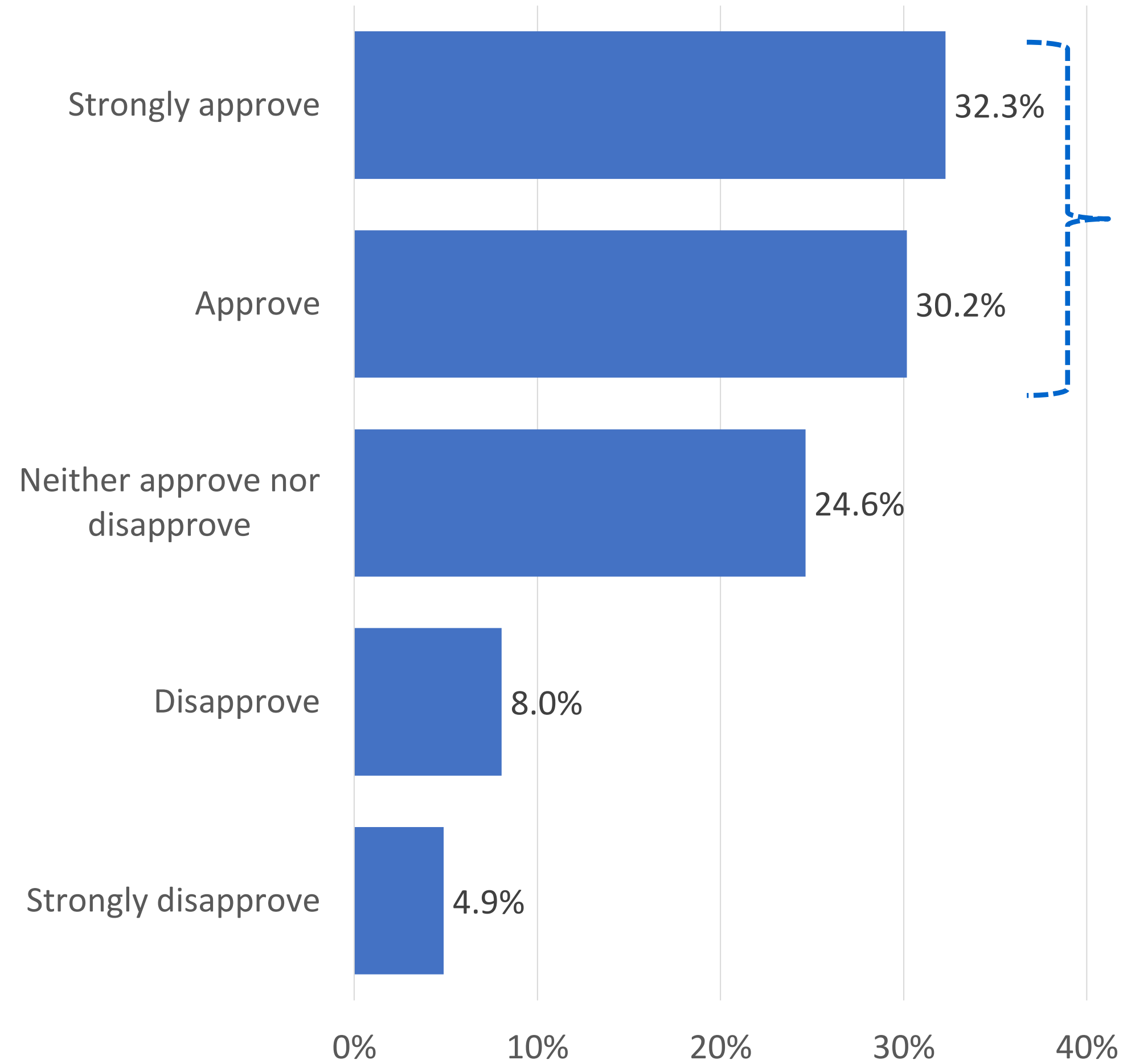
Feelings about Domestic Travel Restrictions

Opinions on State Travel Restrictions

Question: Some U.S. States are requiring that travelers from high-risk states take action such as showing a negative COVID-19 test or opting to self-quarantine for 14 days.

Which best describes how you feel about these policies? (Select one)

(Base: Wave 23 data. All respondents, 1,193 completed surveys. Data collected Aug 14-16, 2020)



62.4%

**Top-Two Box
by Region**

West—55.2%

Midwest—63.0%

Northeast—67.6%

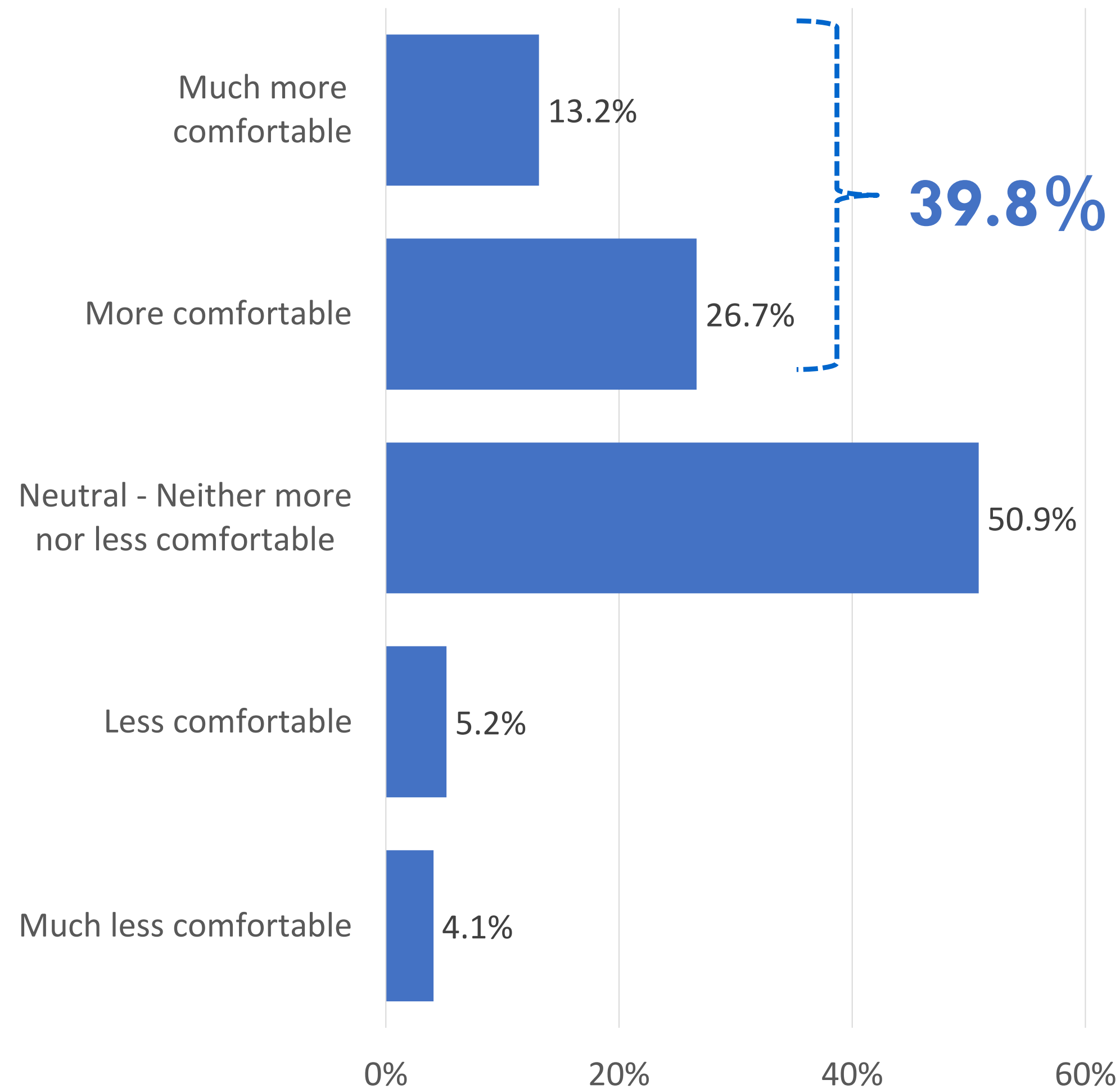
South—64.1%

State Restrictions and Comfort with Travel: Home State

Question: If your state put in place (or has already put in place) such restrictions, would this make you more or less comfortable with traveling **INSIDE YOUR OWN STATE?** (Select one to fill in the blank)

I would be _____ traveling inside my own state.

(Base: Wave 23 data. All respondents, 1,196 completed surveys. Data collected Aug 14-16, 2020)



Top-Two Box by Region

West—34.4%

Midwest—30.5%

Northeast—46.1%

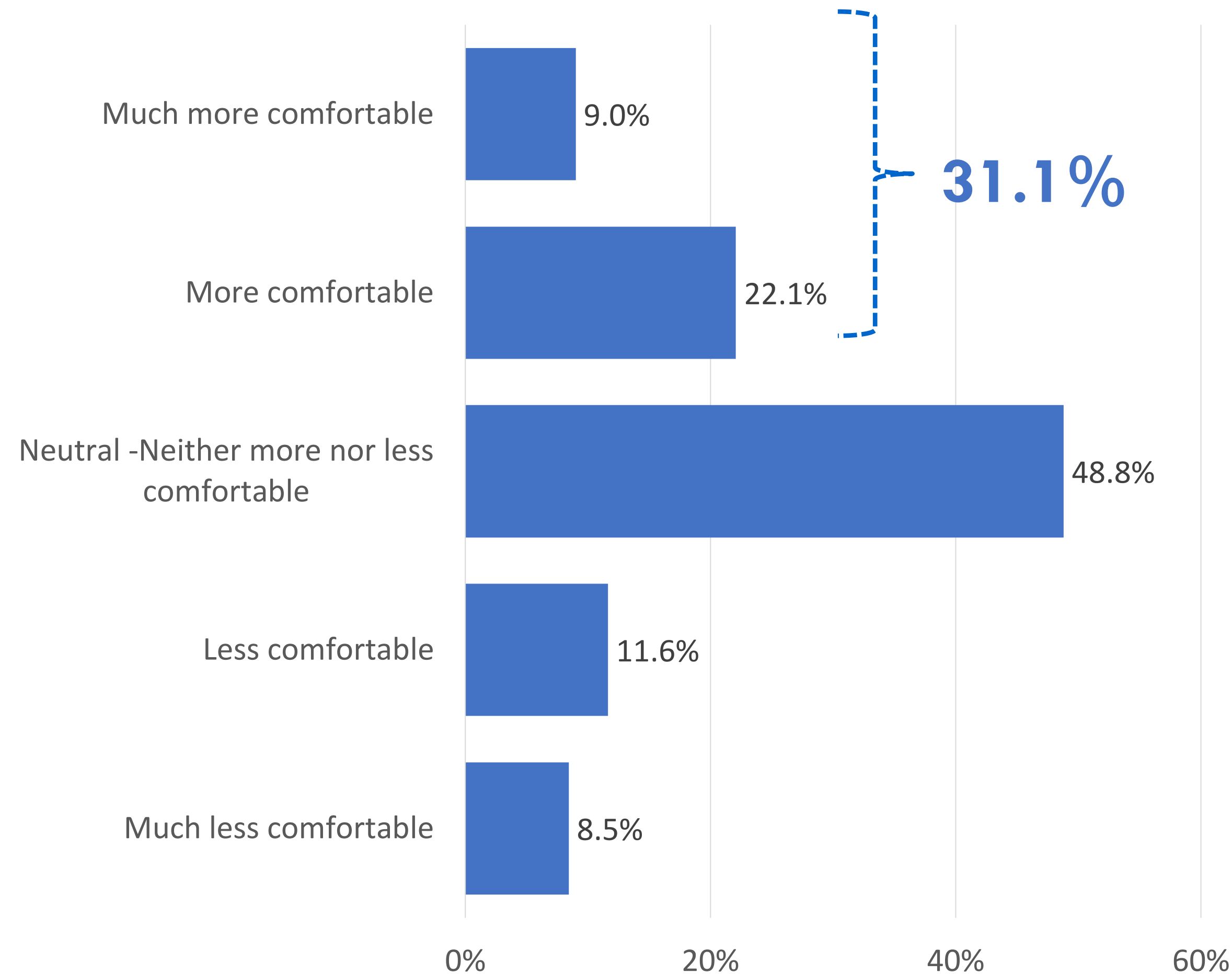
South—45.3%

State Restrictions and Comfort with Travel: Other States

Question: If a state you want to visit put in place (or has already put in place) such restrictions, would this make you more or less comfortable visiting that state?

I would be _____ visiting that state.

(Base: Wave 23 data. All respondents, 1,191 completed surveys. Data collected Aug 14-16, 2020)



Top-Two Box by Region

West—26.7%

Midwest—27.2%

Northeast—32.1%

South—35.3%

Key Takeaways

- A majority of American travelers approve of travel restriction policies imposed by state governments on travelers from high outbreak areas
- These domestic travel restrictions appear to have a net positive impact on in-state travel
- Those who reside in the Northeast are most approving of such travel restrictions and also express the highest level of comfort traveling in-state if their own state put restrictions in place. The West appears least comfortable now.



**CORONAVIRUS
TRAVEL RESTRICTIONS**

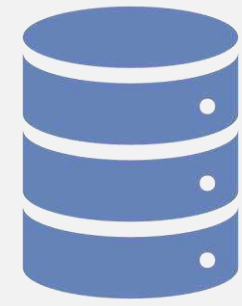


Coronavirus Travel Sentiment Index

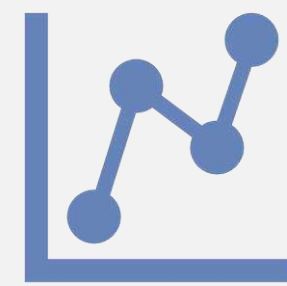
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 17th

What is a Predictive Index?



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



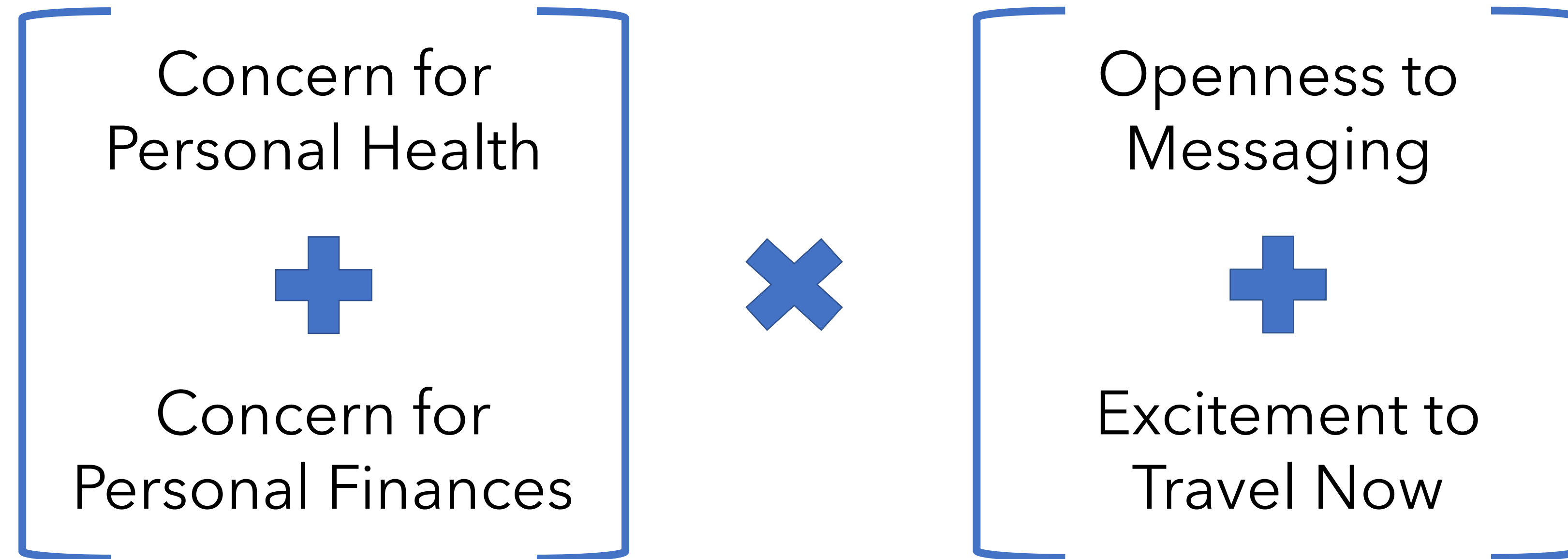
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

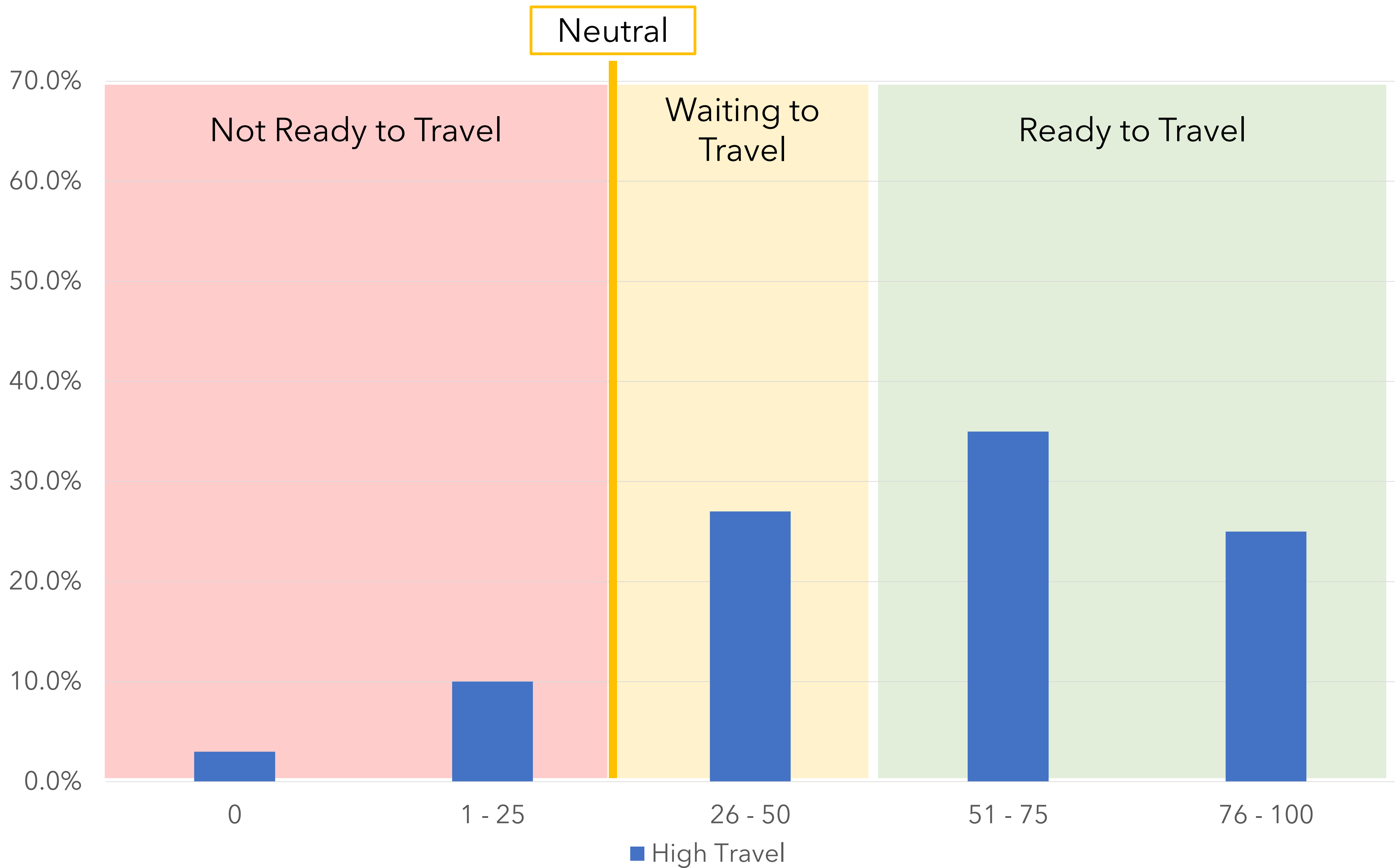
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



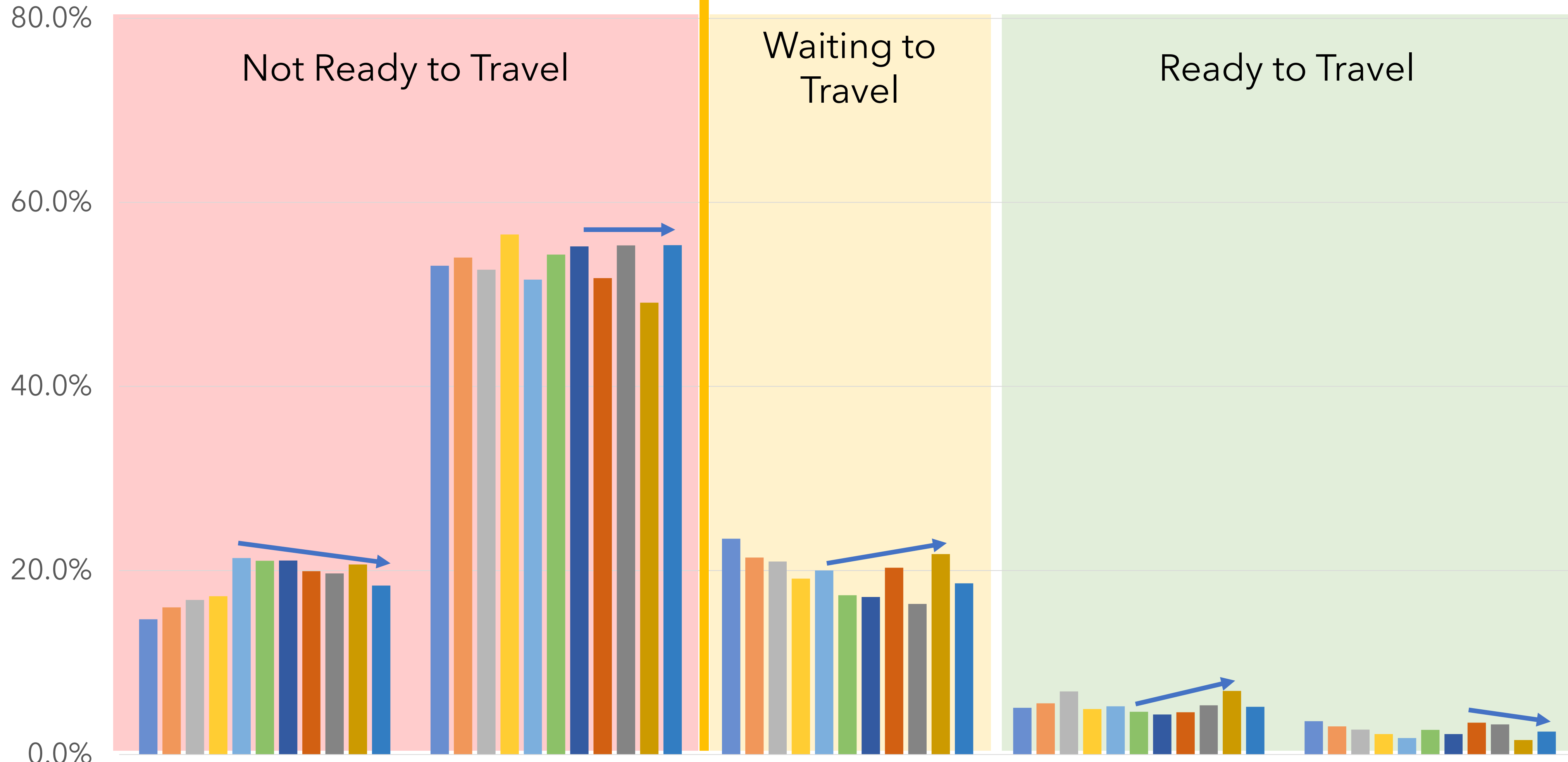
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook

Neutral



June 5-7

June 12-14

June 19-21

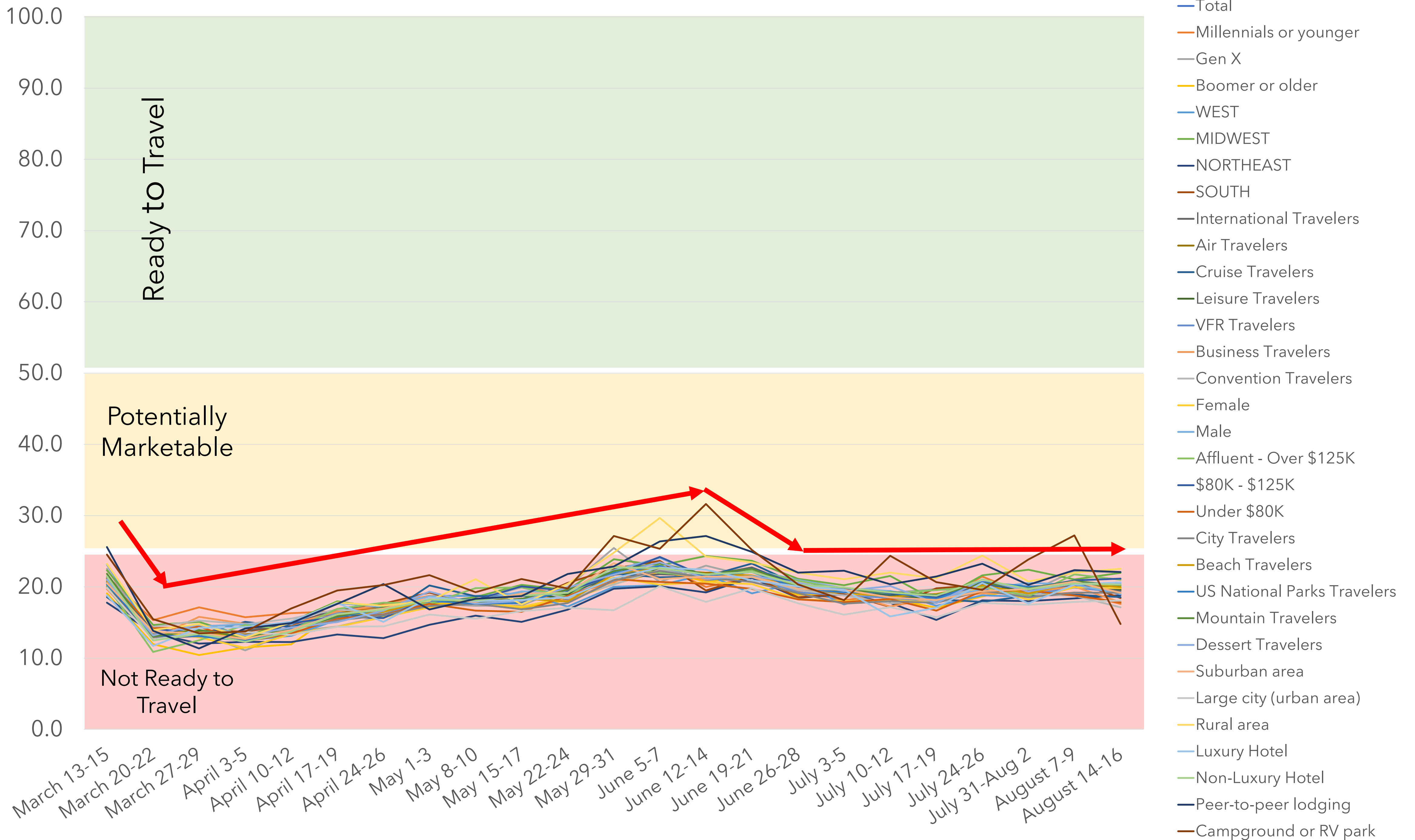
June 26-28

July 3-5

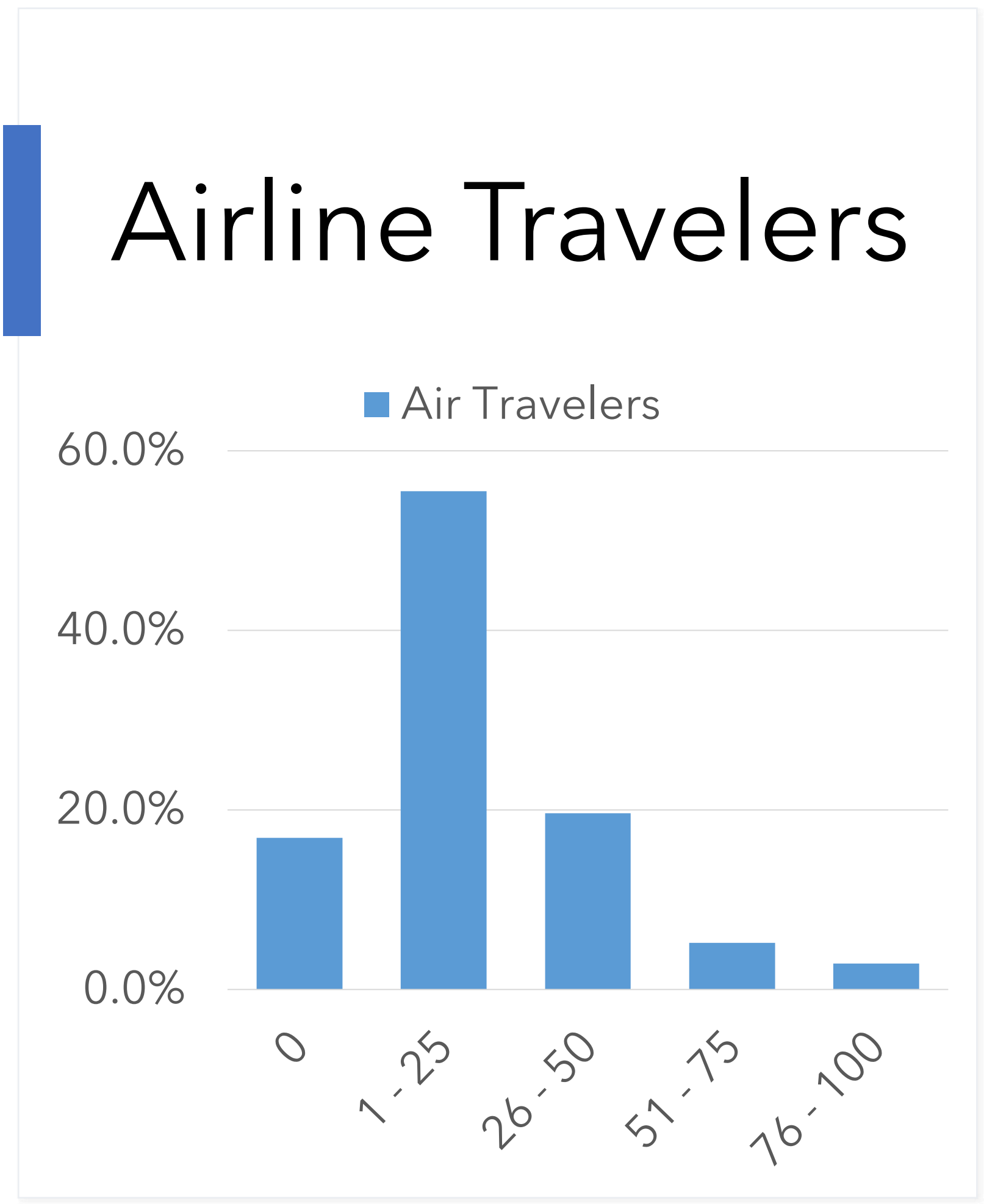
July 10-12

July 17-19

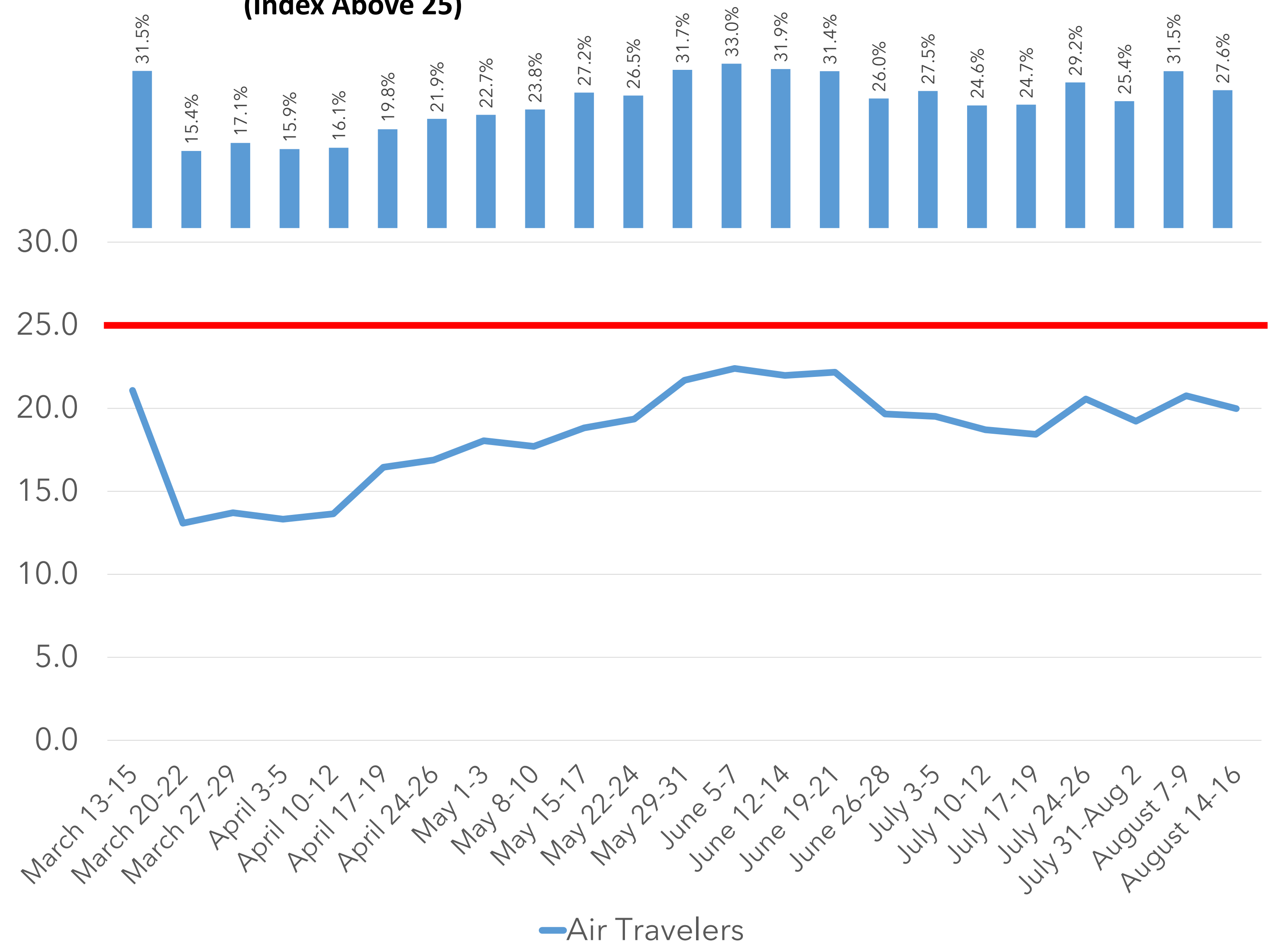
July 24-26



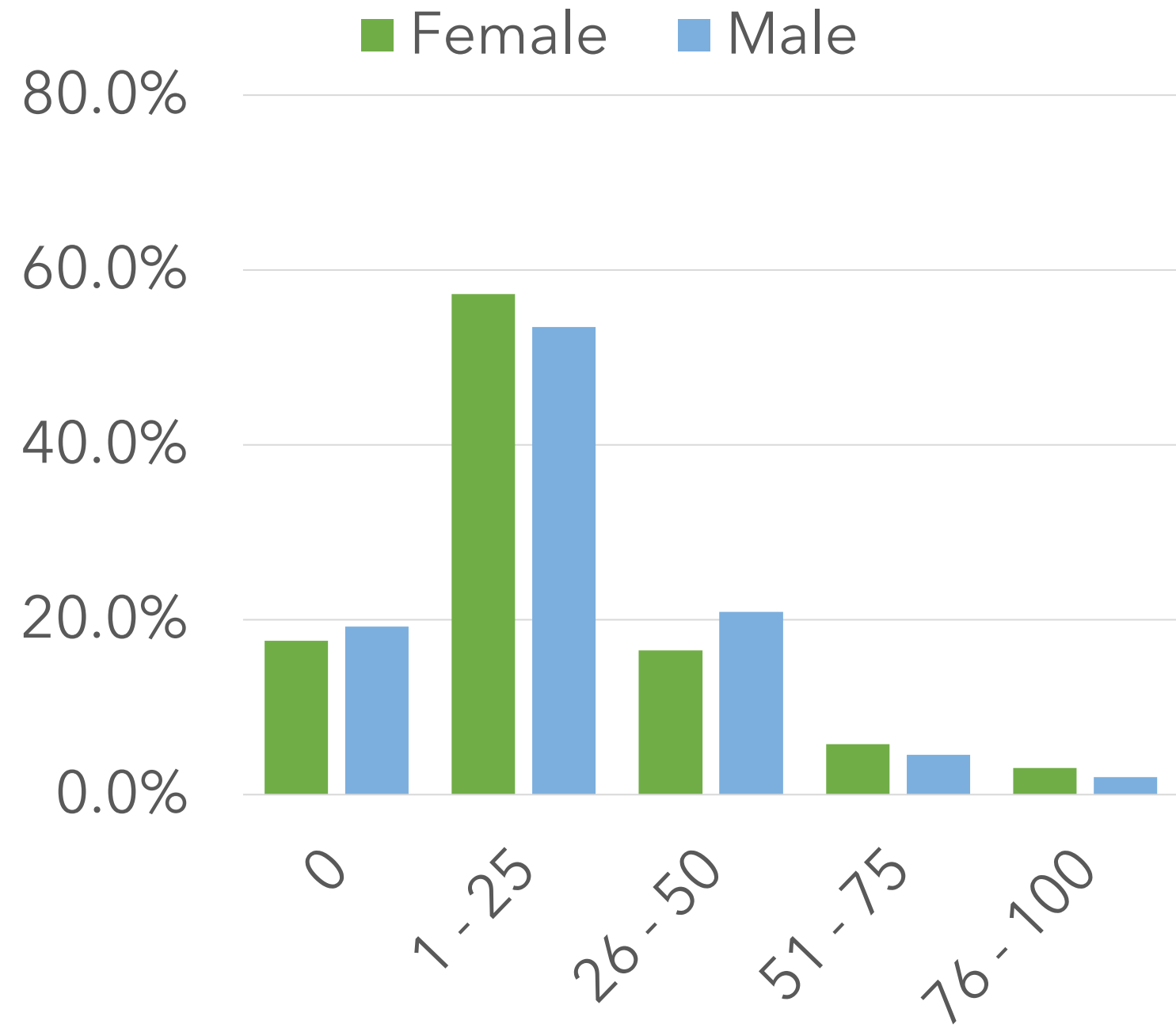
Airline Travelers



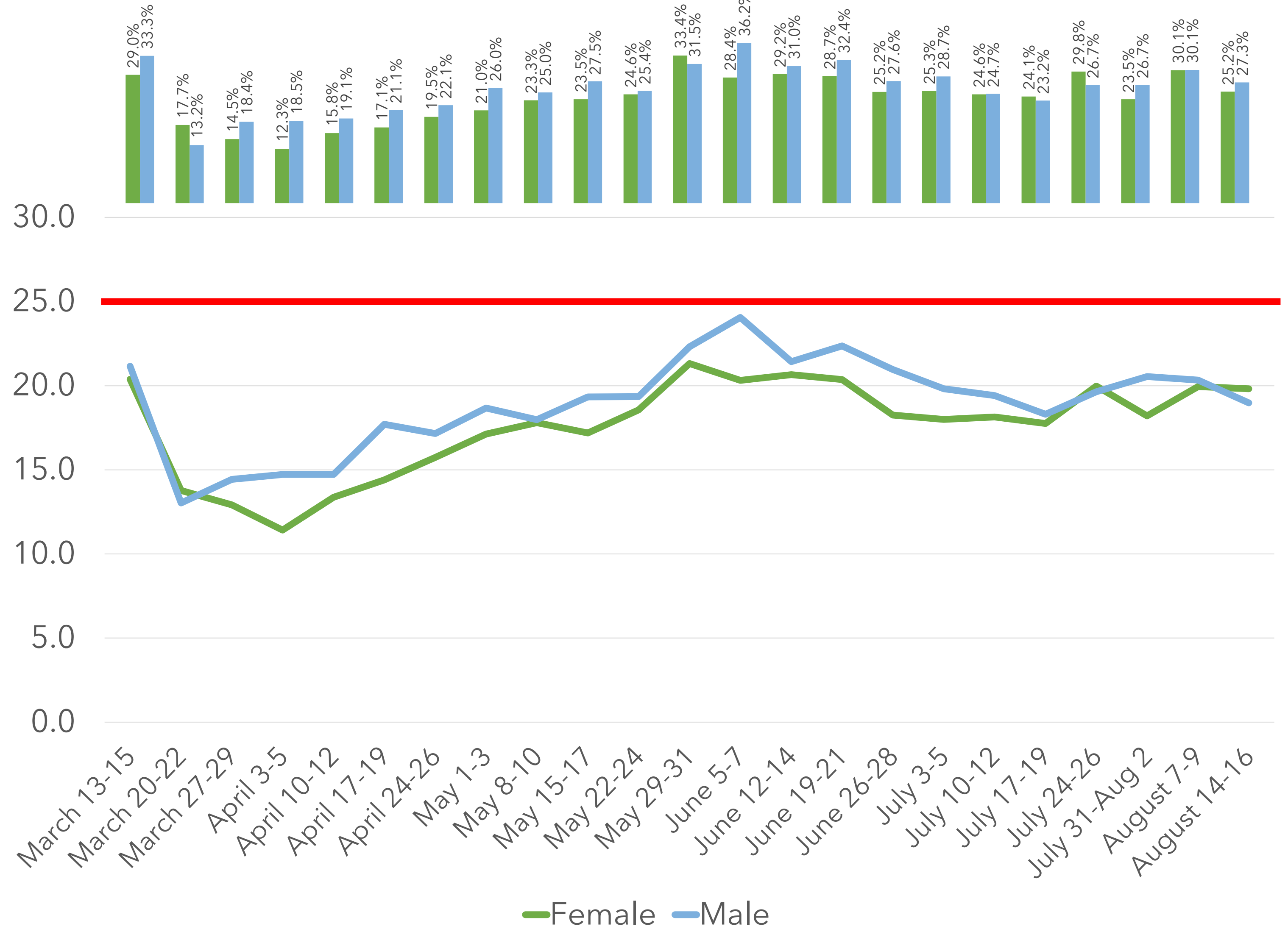
Percent Potentially Marketable (Index Above 25)



Gender

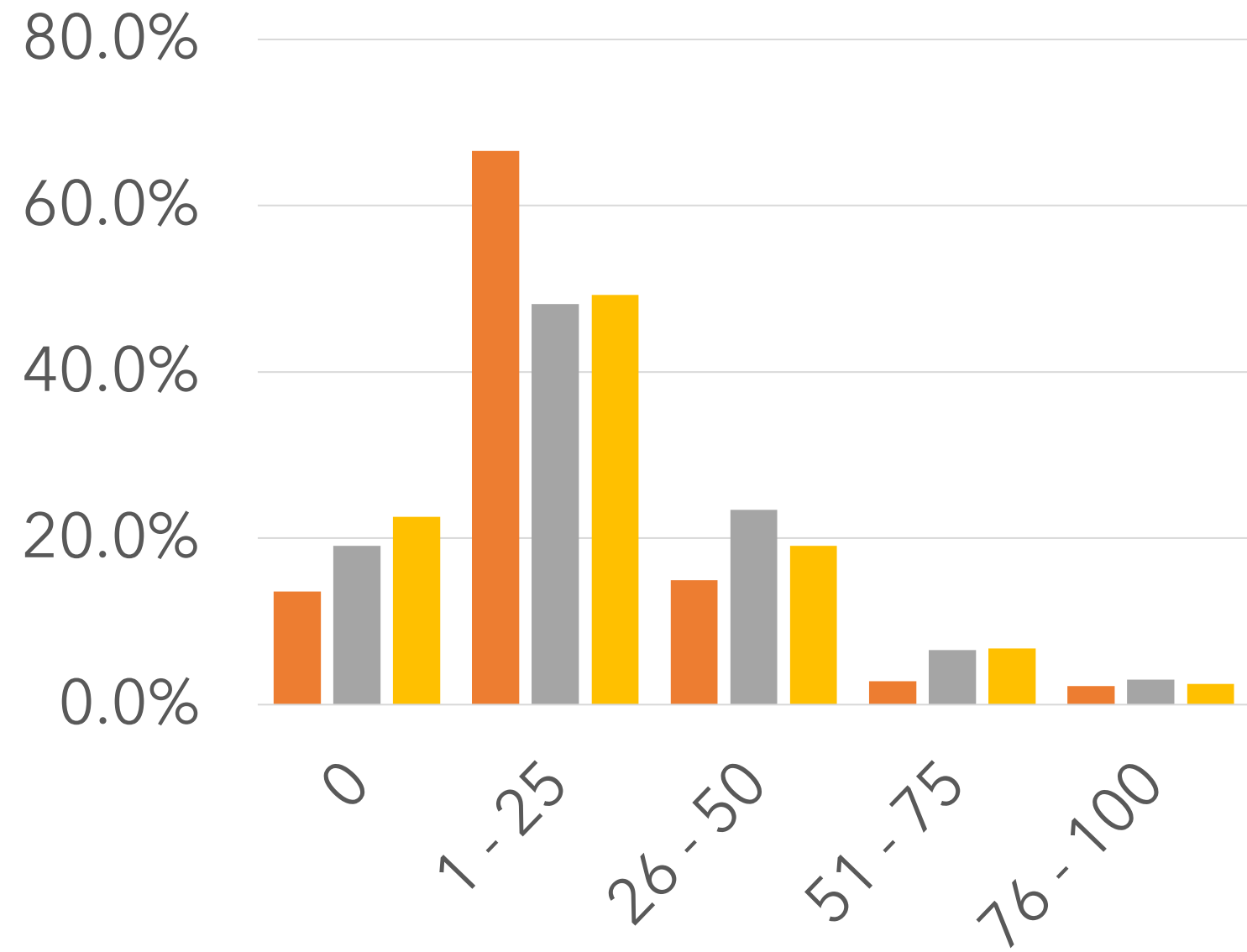


Percent Potentially Marketable (Index Above 25)

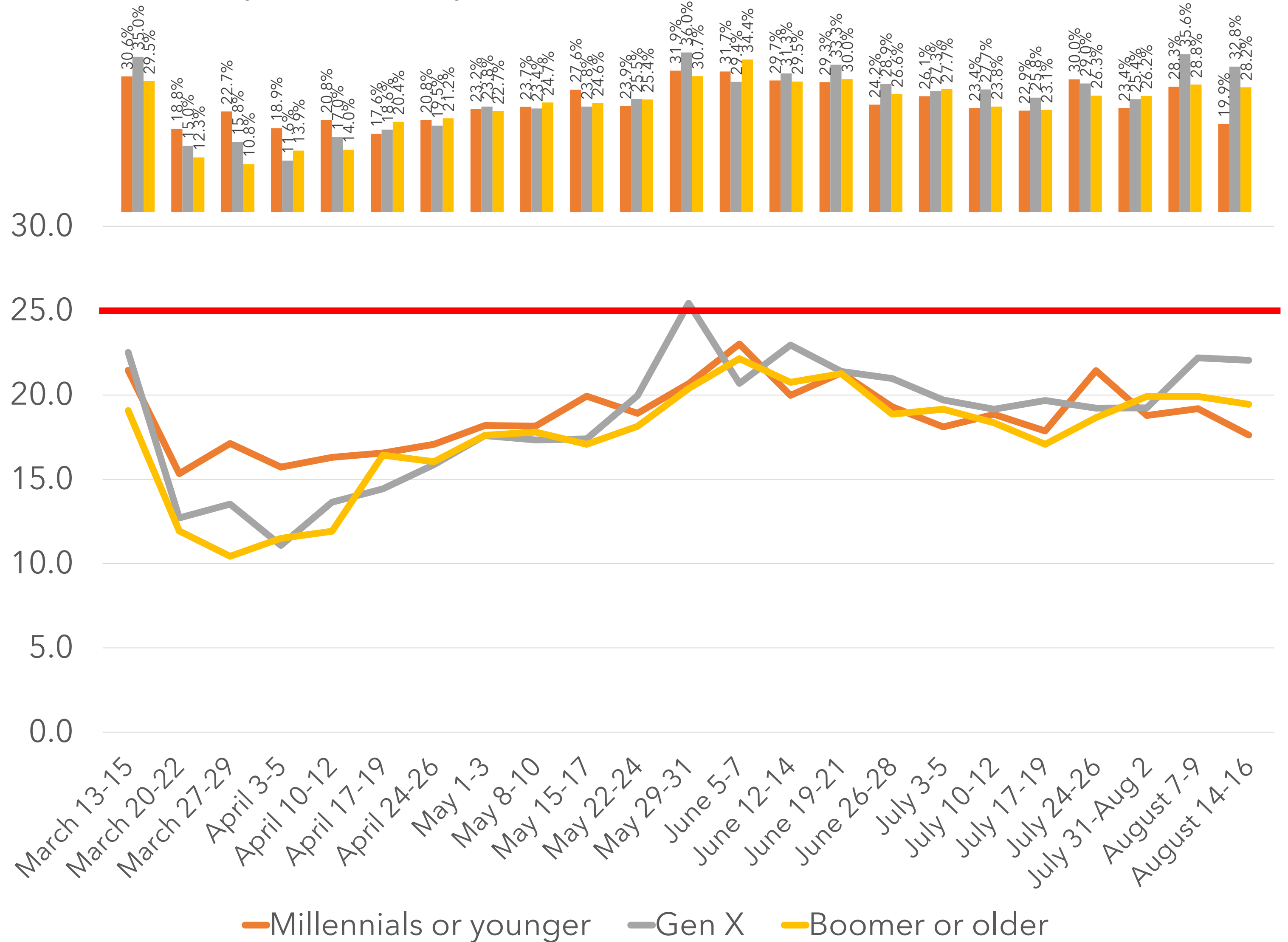


Generation

■ Millennials or younger
 ■ Gen X
 ■ Boomer or older

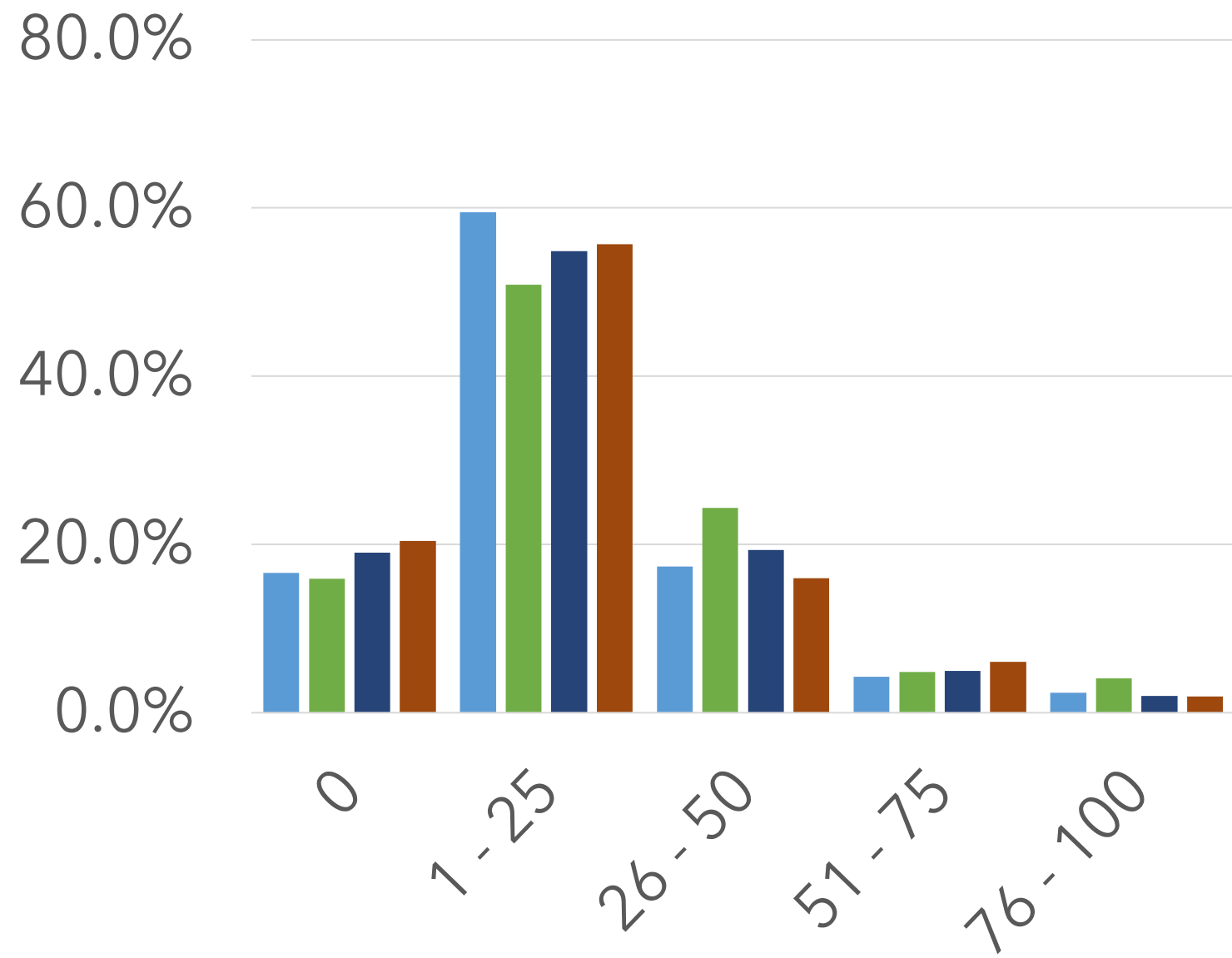


Percent Potentially Marketable (Index Above 25)

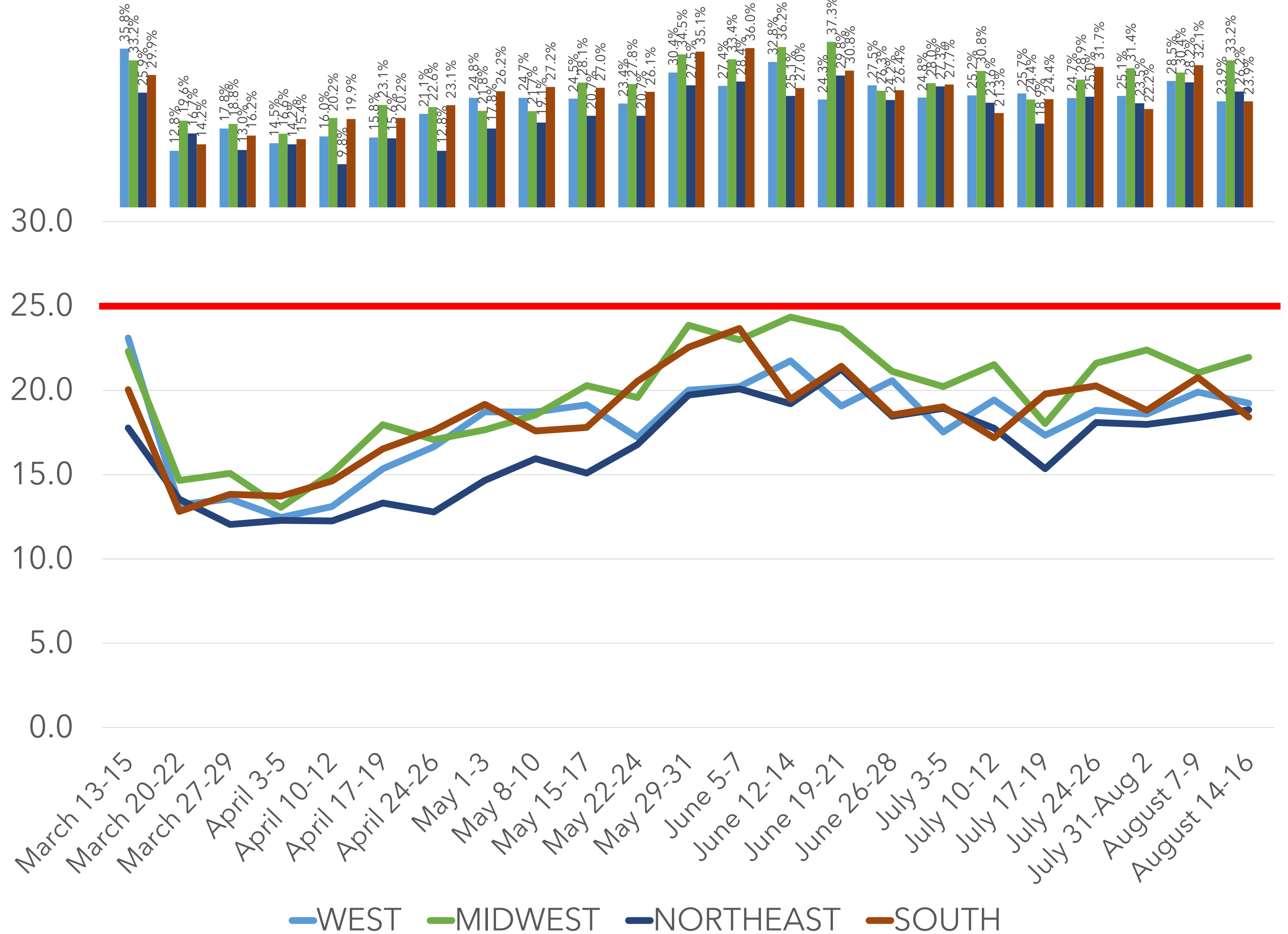


US Regions

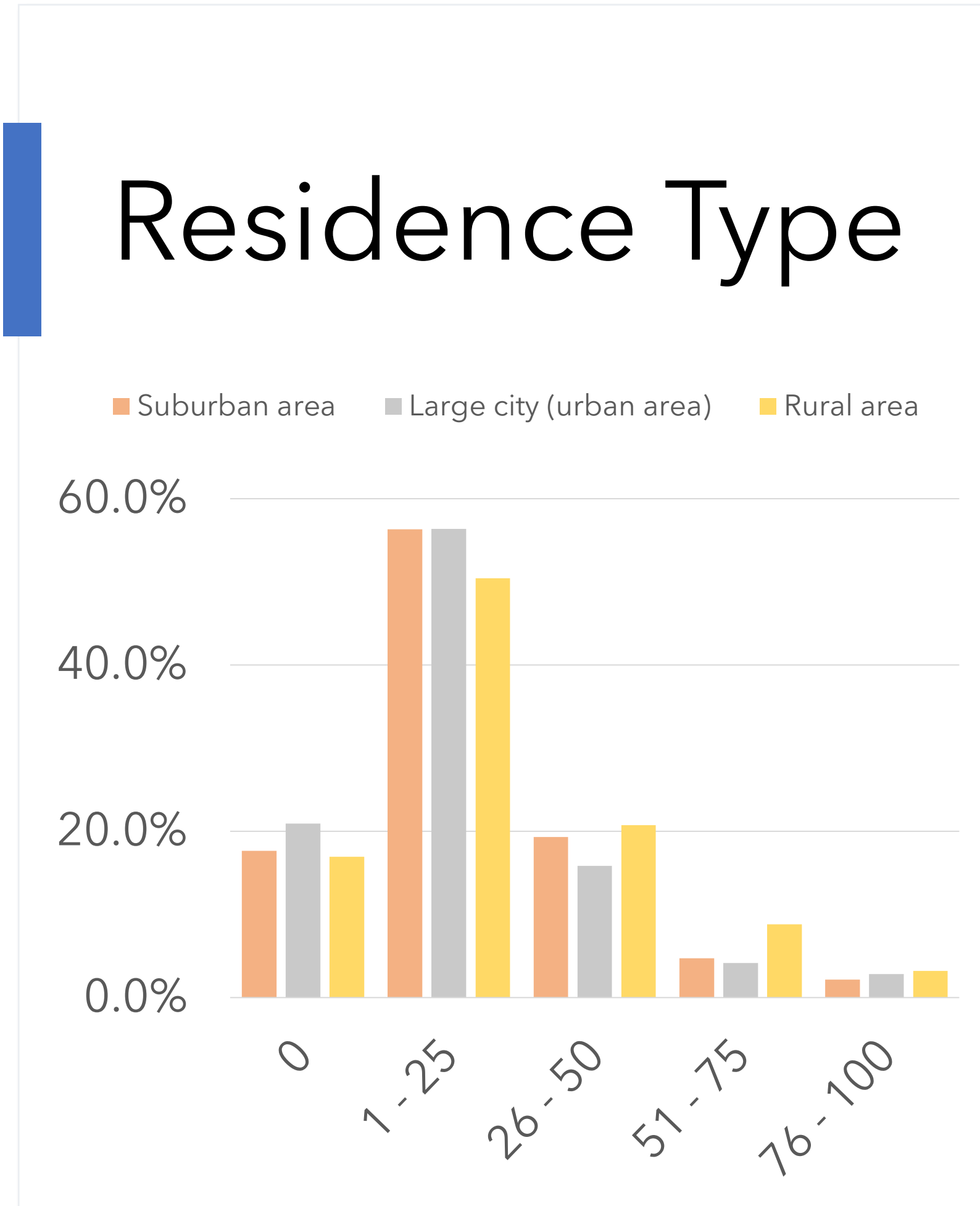
WEST MIDWEST NORTHEAST SOUTH



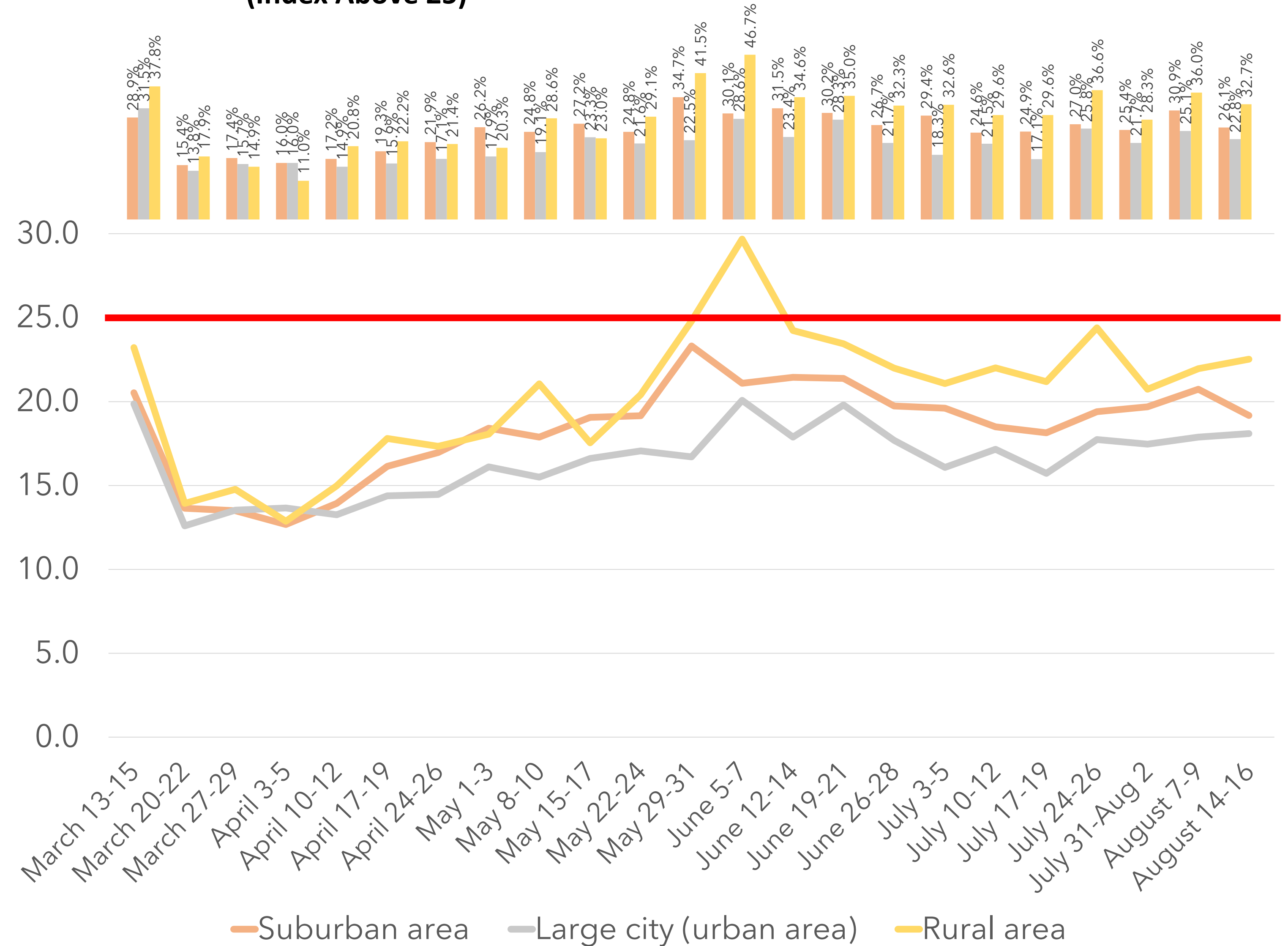
Percent Potentially Marketable (Index Above 25)



Residence Type



Percent Potentially Marketable (Index Above 25)

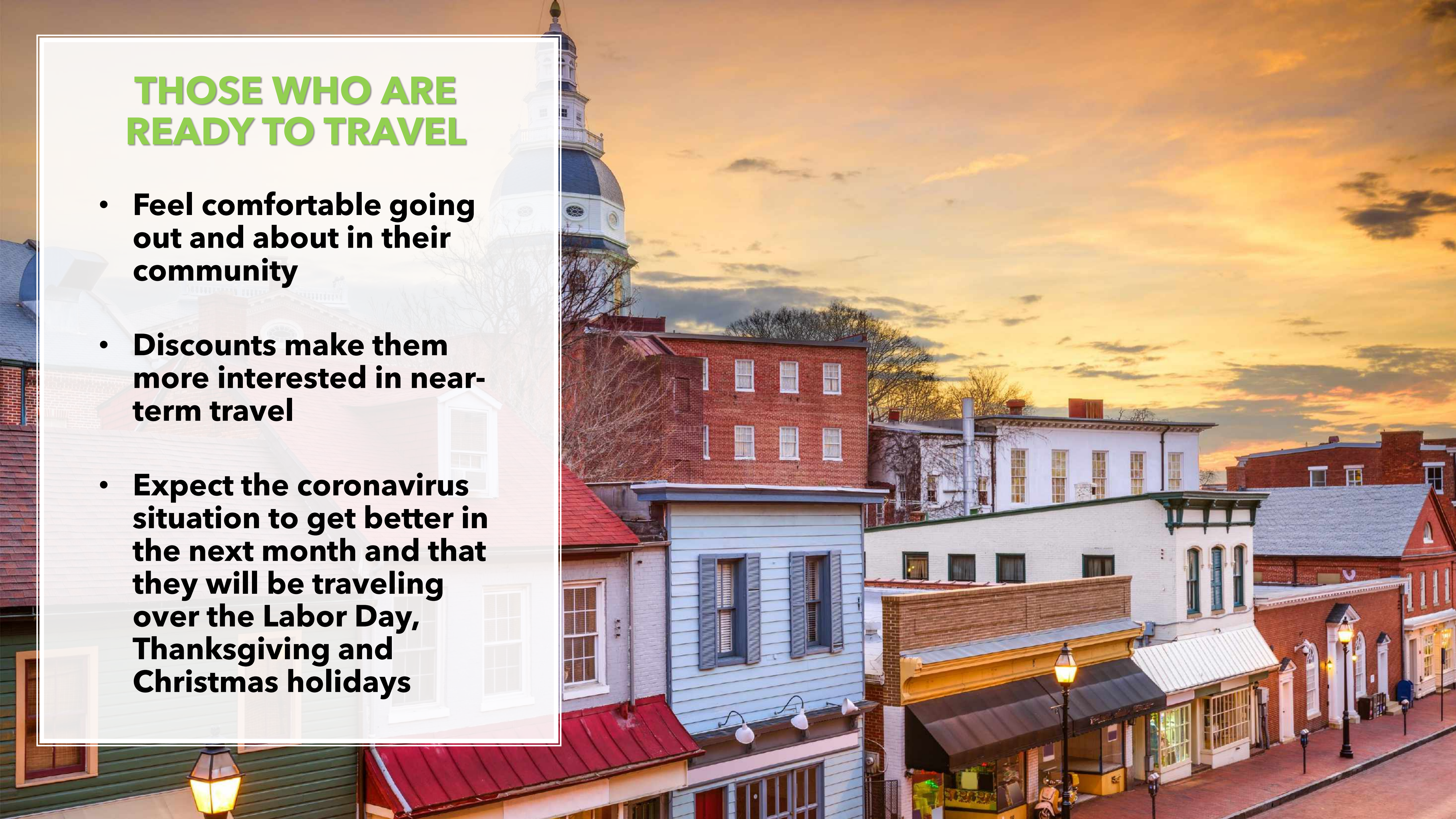


A black, ribbed suitcase sits on a light-colored, textured rug. On top of the suitcase are several items: a blue surgical mask, a pair of glasses, a light-colored hat, and a small orange bag. A pair of blue jeans is also visible next to the suitcase. The scene is lit with soft, natural light, creating a warm and inviting atmosphere.

Those Who are Ready to Travel

THOSE WHO ARE READY TO TRAVEL

- **Feel comfortable going out and about in their community**
- **Discounts make them more interested in near-term travel**
- **Expect the coronavirus situation to get better in the next month and that they will be traveling over the Labor Day, Thanksgiving and Christmas holidays**



THOSE WHO ARE READY TO TRAVEL

- **Are less likely to perceive activities associated with travel and flights as unsafe**
- **Are ready to take both direct flights and connecting flights**



THOSE WHO ARE READY TO TRAVEL

- **Would feel happy if they saw an ad promoting tourism to their community and are more open to having travelers visit right now**
- **Having a scheduled vacation and planning for a vacation in the next six months would bring them happiness**



A woman with short brown hair, wearing glasses and a blue patterned scarf, is looking at a large map. In the background, a man wearing a straw hat and a white shirt is taking a photograph with a camera. The scene is set outdoors in front of a white building with many windows.

Those Who Will Prioritize International Leisure Travel



Those prioritizing international leisure travel are:

- Slightly more likely to say they will avoid travel until the Coronavirus situation blows over (67.8% vs. 59.2% for all travelers)
- However, they are much more optimistic about the coronavirus situation improving in the U.S. in the next month and significantly more likely to say they will be traveling in the Fall (64.2% vs. 32.4%)
- Much less likely to consider traveling by train, motor coach, taxi/ride share and traveling outside the U.S. to be unsafe
- Travel discounts and price cuts are much more attractive to this group (72.8% vs. 39.0%)

Those prioritizing international leisure travel:

- For the upcoming traveling months, this group is much more likely to have at least tentative travel plans for January and February of 2021
- Much more likely to have traveled outside the U.S. (70.4% vs. 41.7%) and much more likely to have stayed in a 5-star hotel (46.5% vs. 24.1%) in the past two years
- Skew Millennial or younger (60.9%) with an average HHI of \$108,606 who live in urban areas (47.8%)



Next/Ongoing Updates

- Key Findings to Know released via email every Monday morning
- Complete Report of Findings sent (and dashboard updated) by each Tuesday morning
- Online Presentation of Findings every Tuesday at 8:00am PST/11:00am EST
- Shareable infographics and gifs on social media



**Do you have a survey topic you
want us to explore?**

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**

15-minute presentations for your board and stakeholders

info@destinationanalysts.com



Resources for Tourism Advocacy & Recovery

destinationanalysts.com

THIS YEAR ▼ 32.8876
▲ 42.9841

ROI



A silhouette of two hikers on a large rock at sunset. One hiker is standing on the rock, and the other is climbing up, holding the first hiker's hand for support. The background is a warm, orange and yellow sky with some bare branches in the foreground.

Research & Data Support for Grant Applications & Recovery Programs

info@destinationanalysts.com



**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars