

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 26

RESEARCH FINDINGS

September 7, 2020

Destination  Analysts

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Destination  Analysts

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PROJECT OVERVIEW

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 26th 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 26th wave of this survey was collected from September 4th - 6th, 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, 1,225 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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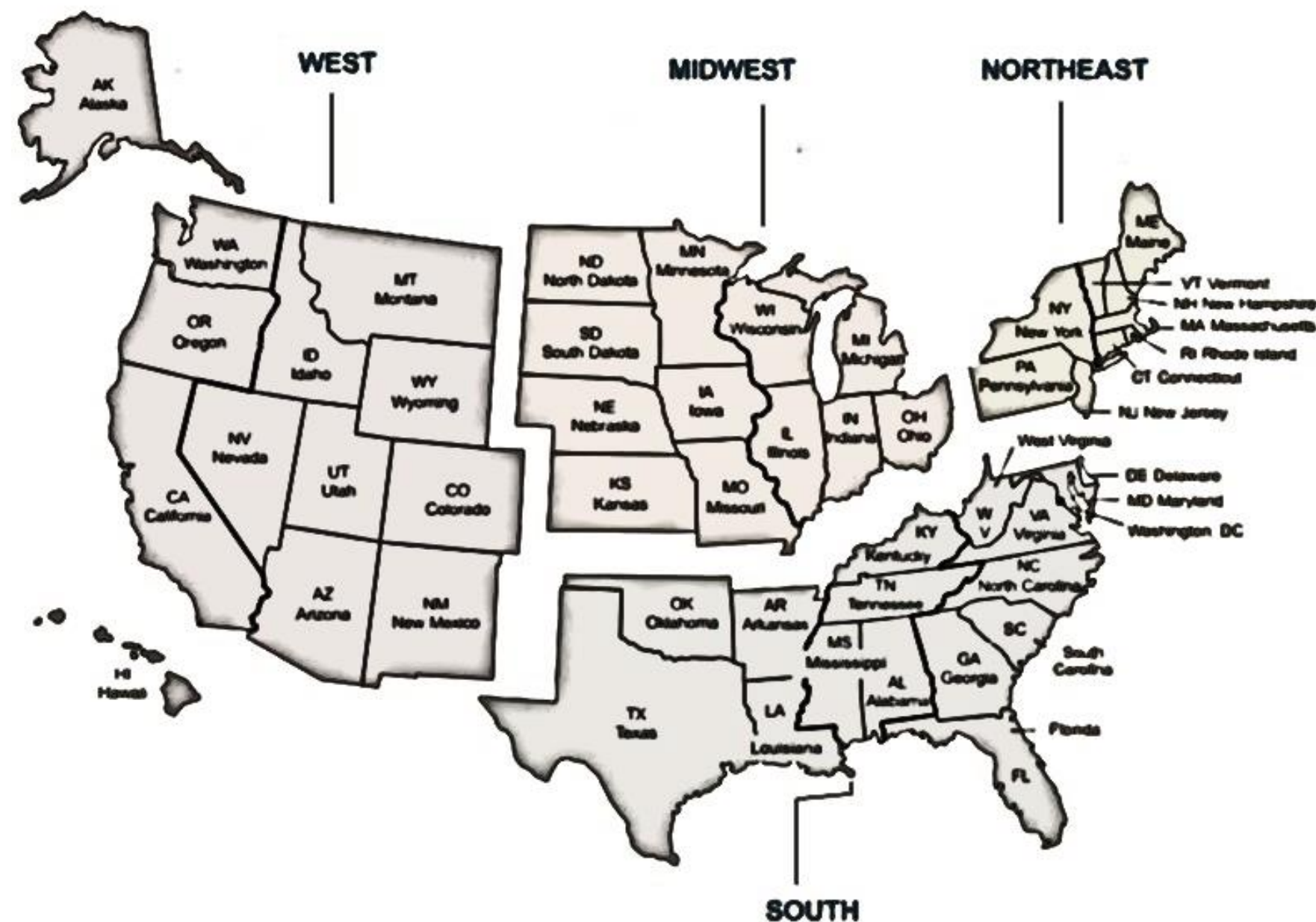


PROJECT OVERVIEW

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
Wave #24	August 20-22	August 23
Wave #25	August 28-30	August 31
Wave #26	September 4-6	September 7
Wave #27	September 11-13	September 14
Wave #28	September 18-20	September 21
Wave #29	September 25-27	September 28

TOP TAKEAWAYS

The following are the top takeaways that emerged from Wave 26 of this weekly consumer traveler sentiment tracking study.

- **Americans' near-term outlook on the pandemic is largely unchanged from last week, meaning pessimism remains in retreat.** This week, 39.3% of American travelers think the pandemic situation will get worse in the United States in the next month (down 16 percentage points from one month ago), 38.1% think it will stay the same, and 22.6% think it will get better. Strong concerns for COVID-19's impact on personal health and financial safety are at or near the lowest levels recorded in the past 26 weeks.
- **When it comes to travel, perceptions of travel activities' safety—while still far from ideal—are the best they have been since the onset of the pandemic.** Among the most confident they can travel safely right now are younger travelers and those in the South.
- **Over half of all American travelers remain in a “ready to travel” versus “need more time” mindset, and 75% continue to report that they have at least tentative trip plans right now.** Openness to travel inspiration improved again this week. In addition, the proportion comfortable with tourists visiting their own communities is among the highest it has been during the pandemic.



TOP TAKEAWAYS

- **Looking back on the pandemic summer, over one-third (34.9%) of American travelers reports taking a leisure trip between June 1st and Labor Day (far fewer traveled for business or conferences). Over 80% of these travelers stayed overnight on these leisure trips, largely in friends/relatives homes and hotels but also in several other types of accommodations. As they had been expressing was their aspiration for months, beaches and rural areas were the most popular destinations. These trips were most commonly planned using online travel content, the opinions of friends and family, printed visitor guides and other social media content. Over two-thirds of these travelers said they researched the coronavirus-related rules and regulations in their trip destination.**
- **July saw the highest percentage of Americans reporting travel this past summer season. Of the three national holidays since the onset of the pandemic, the Fourth of July had the highest reported rate of travel.**
- **While some of these travelers reported feeling unsafe at times, overall these summer trips provided a net increase in confidence that travel can be done safely right now.**

TOP TAKEAWAYS

- In looking at when corporate travel might catch up to leisure travel, **24.2% of American travelers who work for companies in which employees travel for business say that this travel has started again.** Of the three-quarters whose companies are not yet back to business travel, less than 10% have announced a timeline for return. **While a quarter anticipate their company's business travel to return in January, nearly half expect that it will be in April or later.**
- Looking at how more (safe) travel can be inspired, **American travelers—particularly younger ones—are receptive to travel messaging in many channels, with online content, email, search engine marketing and social media seemingly particularly effective.**

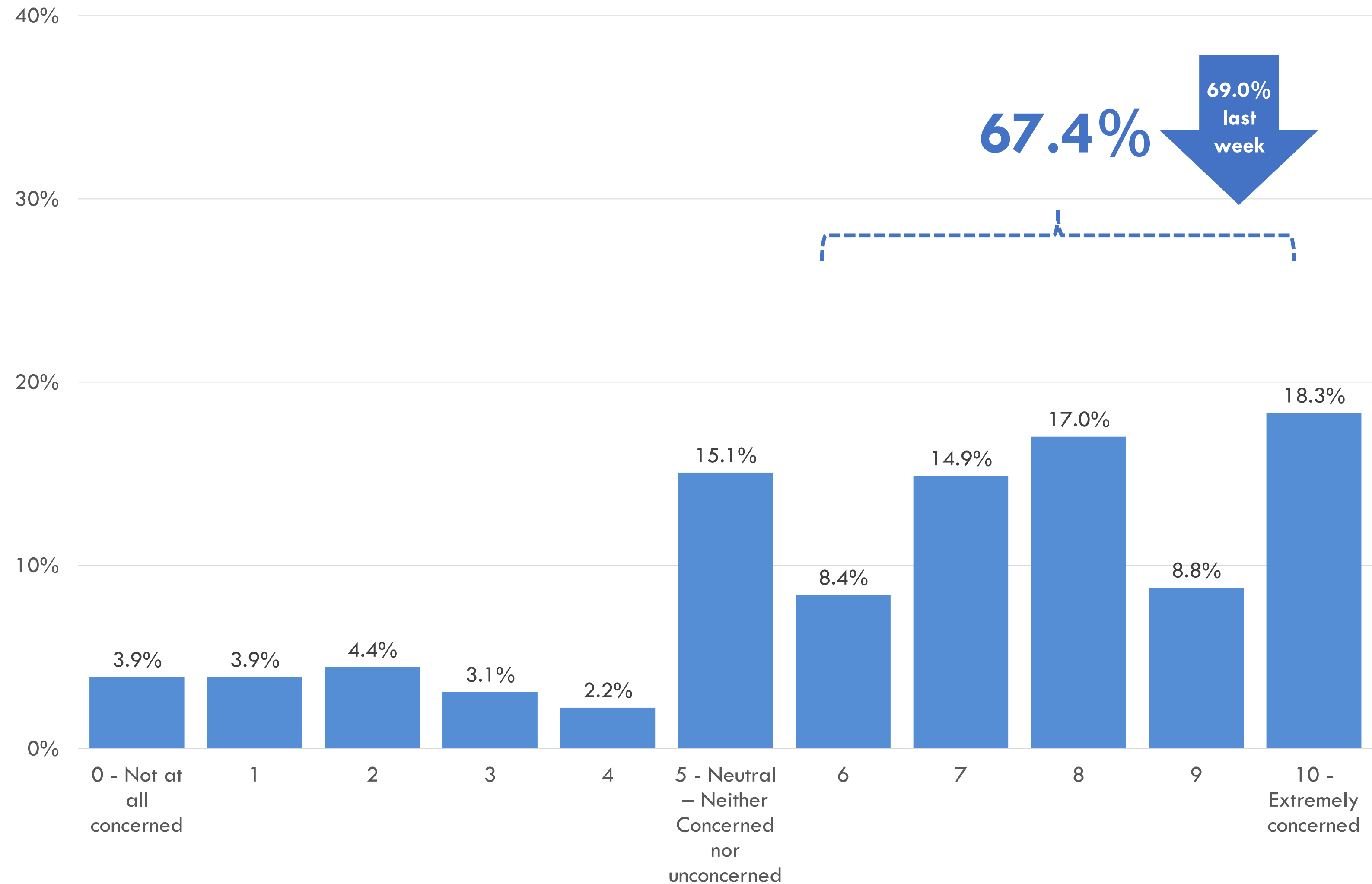
A woman wearing a face mask and a long coat stands in an airport terminal with a yellow suitcase. The background shows airport check-in counters and a red stanchion with a retractable belt. The overall scene is dimly lit, suggesting an indoor airport environment.

CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL

PERSONAL HEALTH CONCERNS

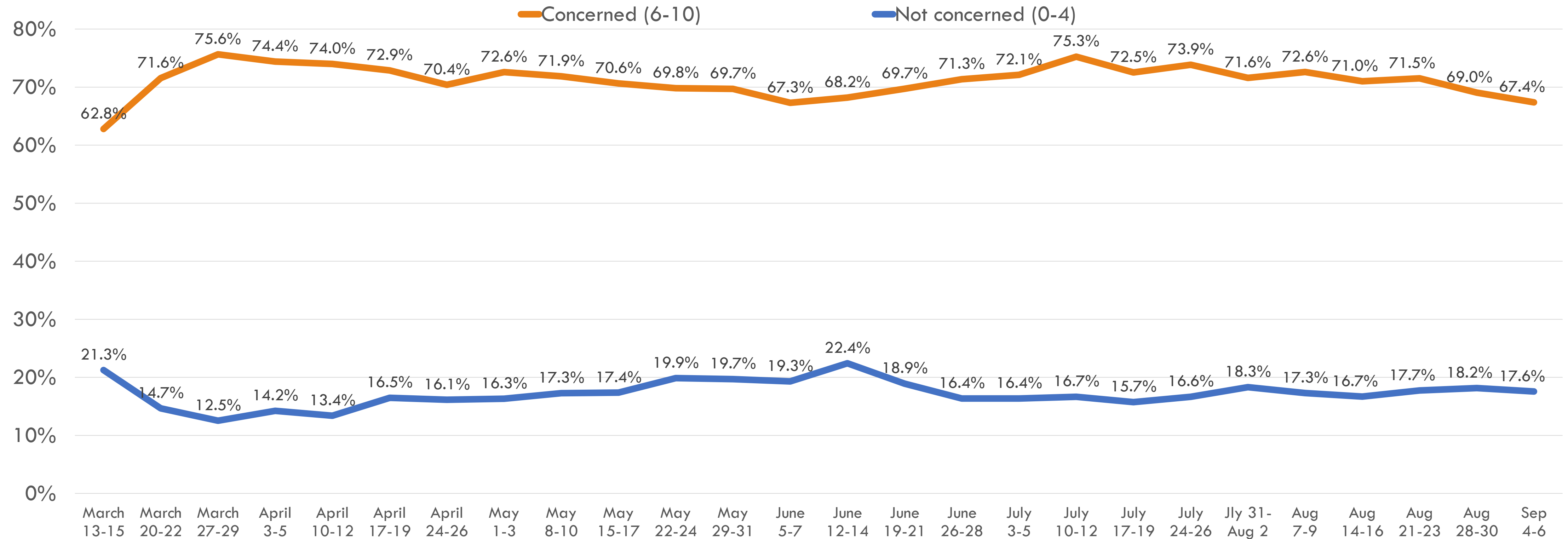
Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



PERSONAL HEALTH CONCERNS (WAVES 1-26)

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

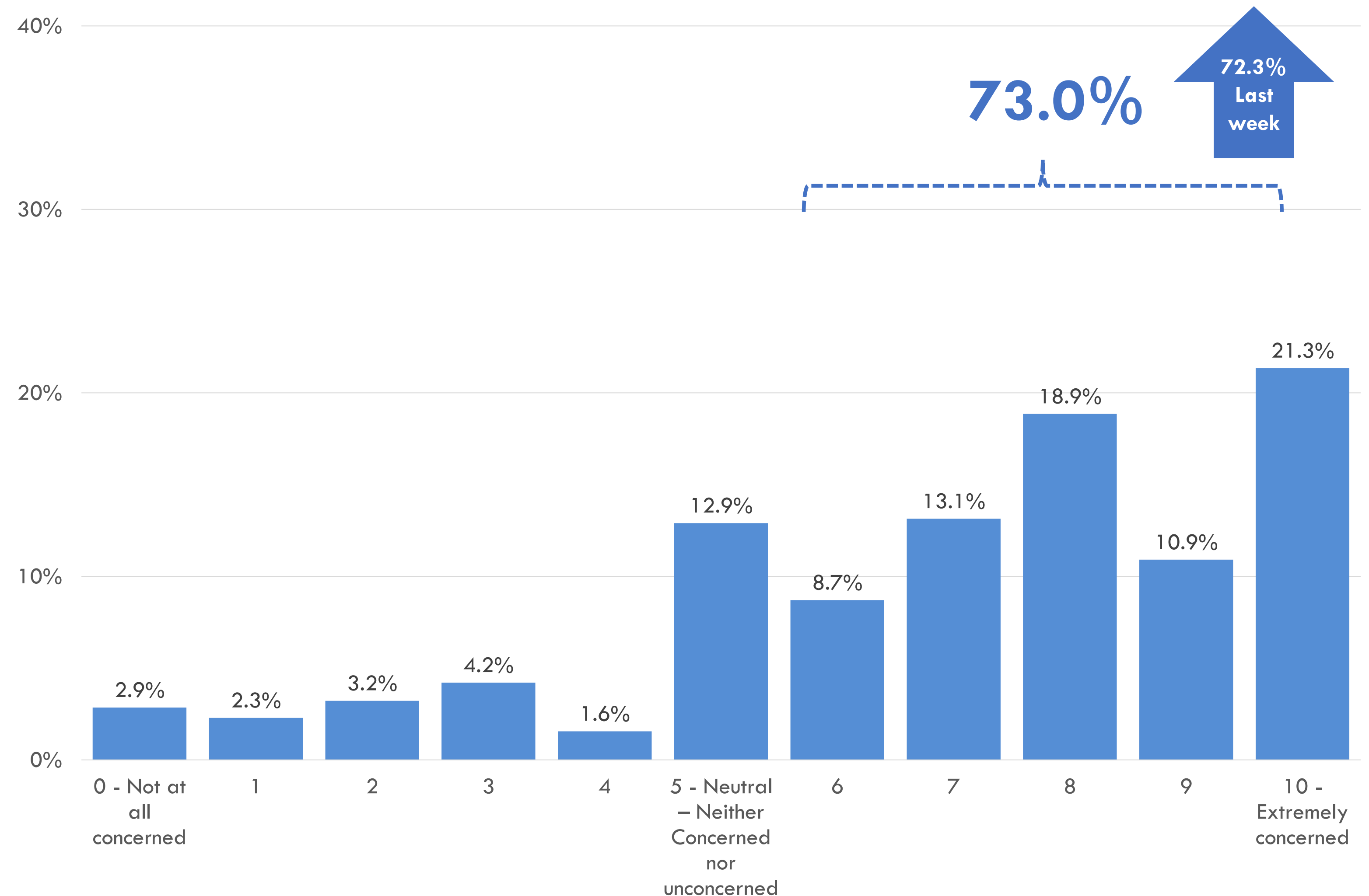


(Base: Waves 1-26. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

HEALTH CONCERNS (FAMILY & FRIENDS)

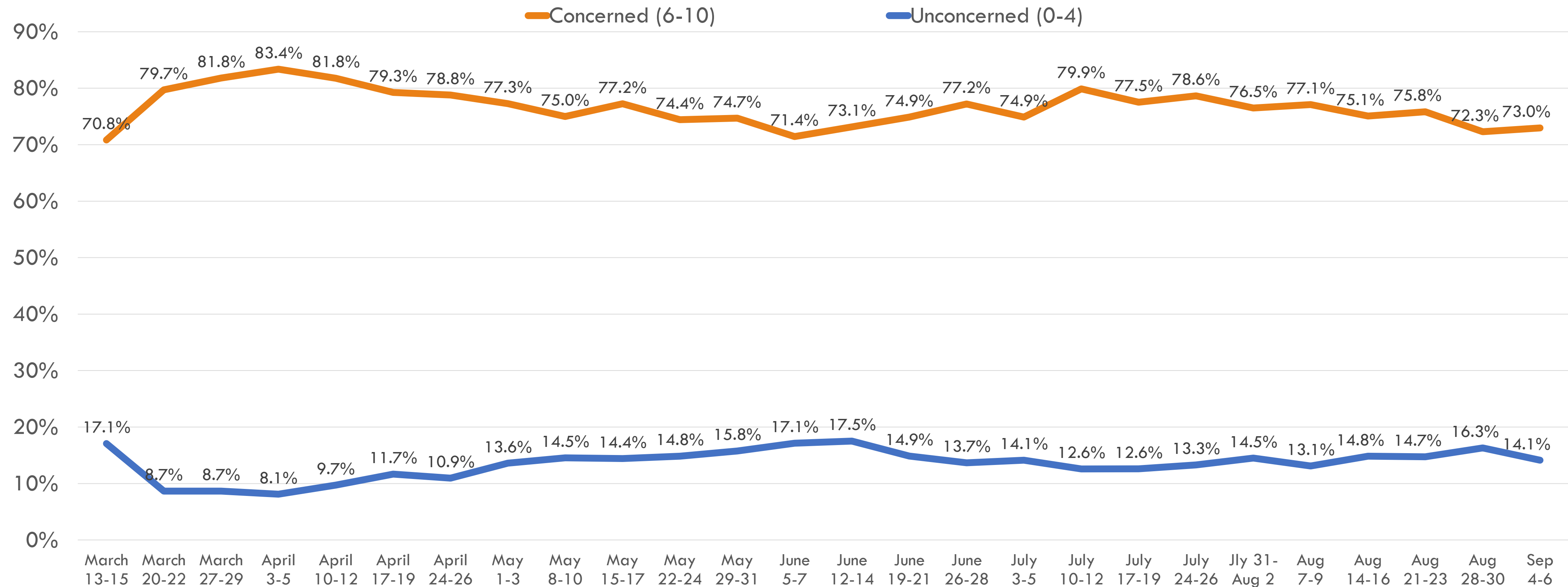
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-26)

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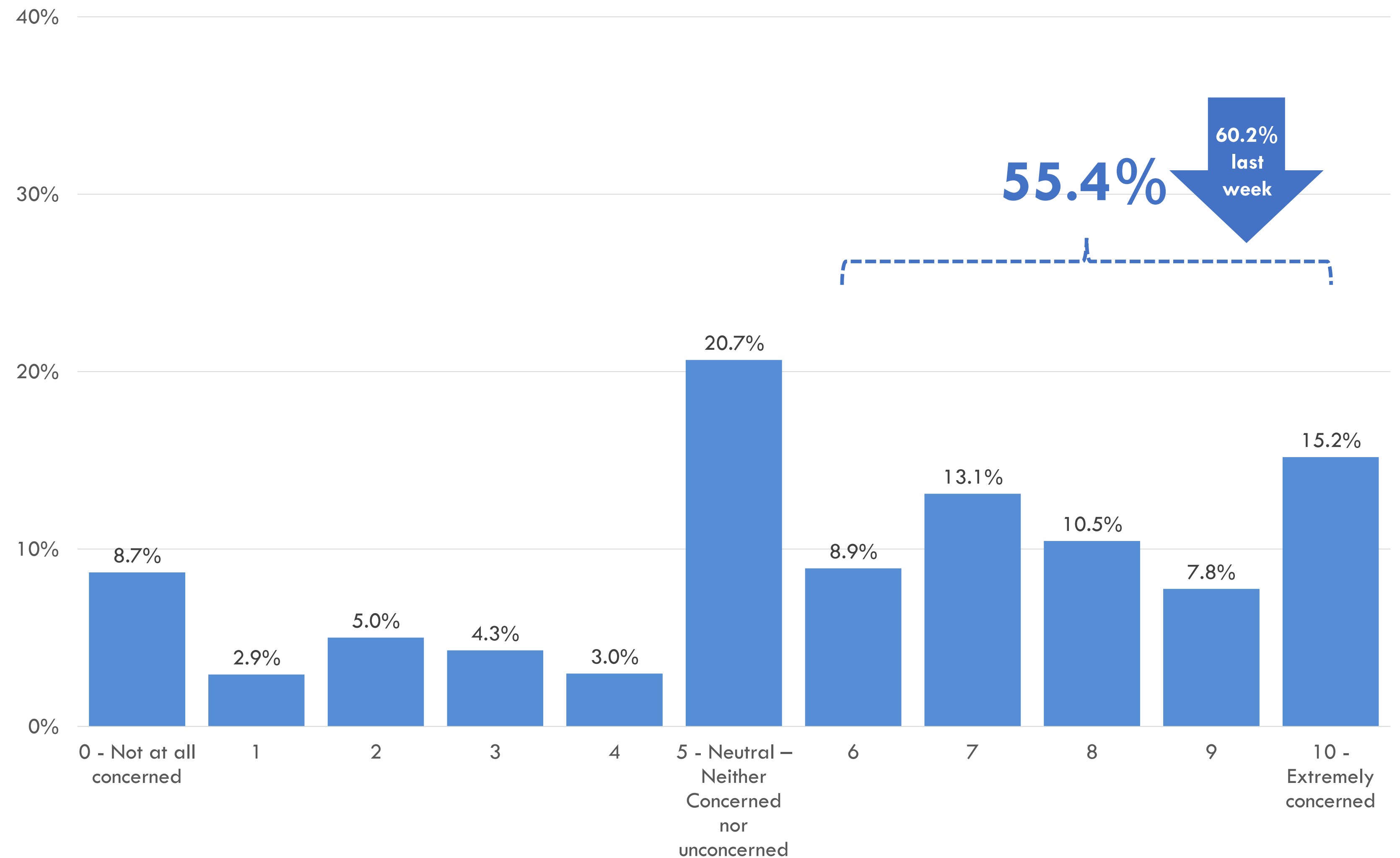


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CONCERNS ABOUT PERSONAL FINANCES

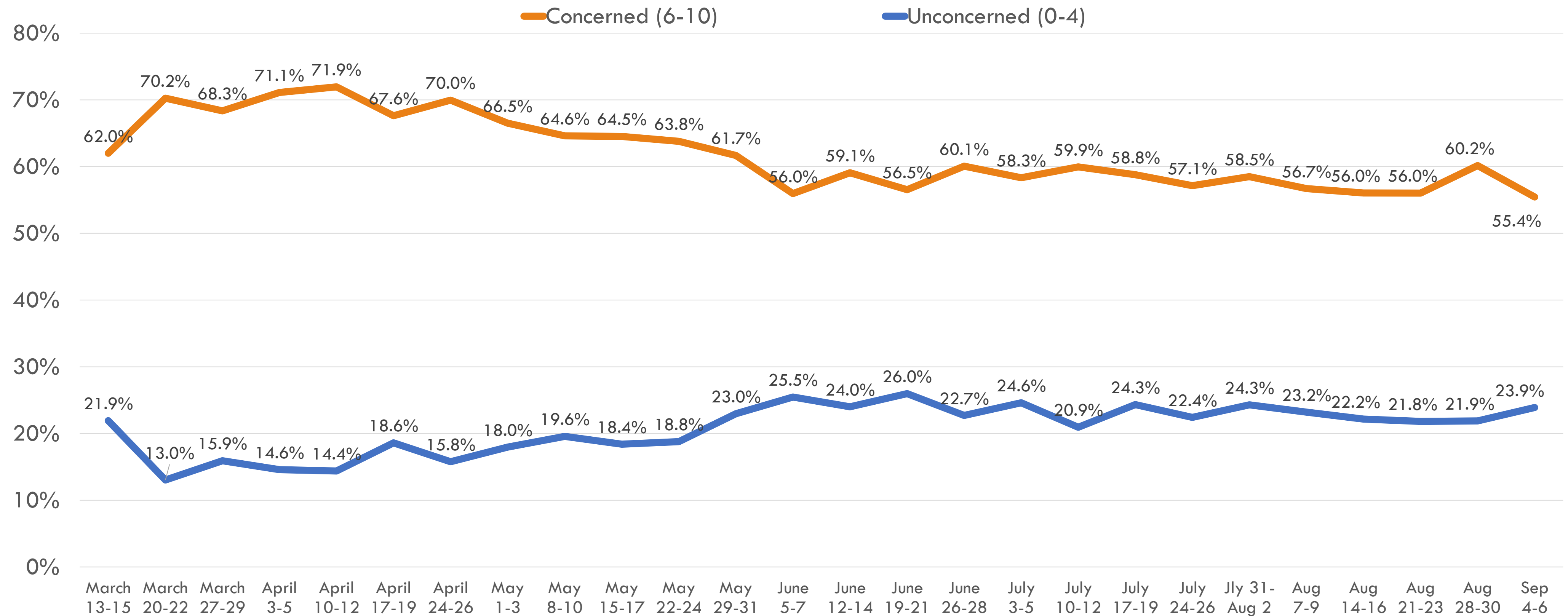
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-26)

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)

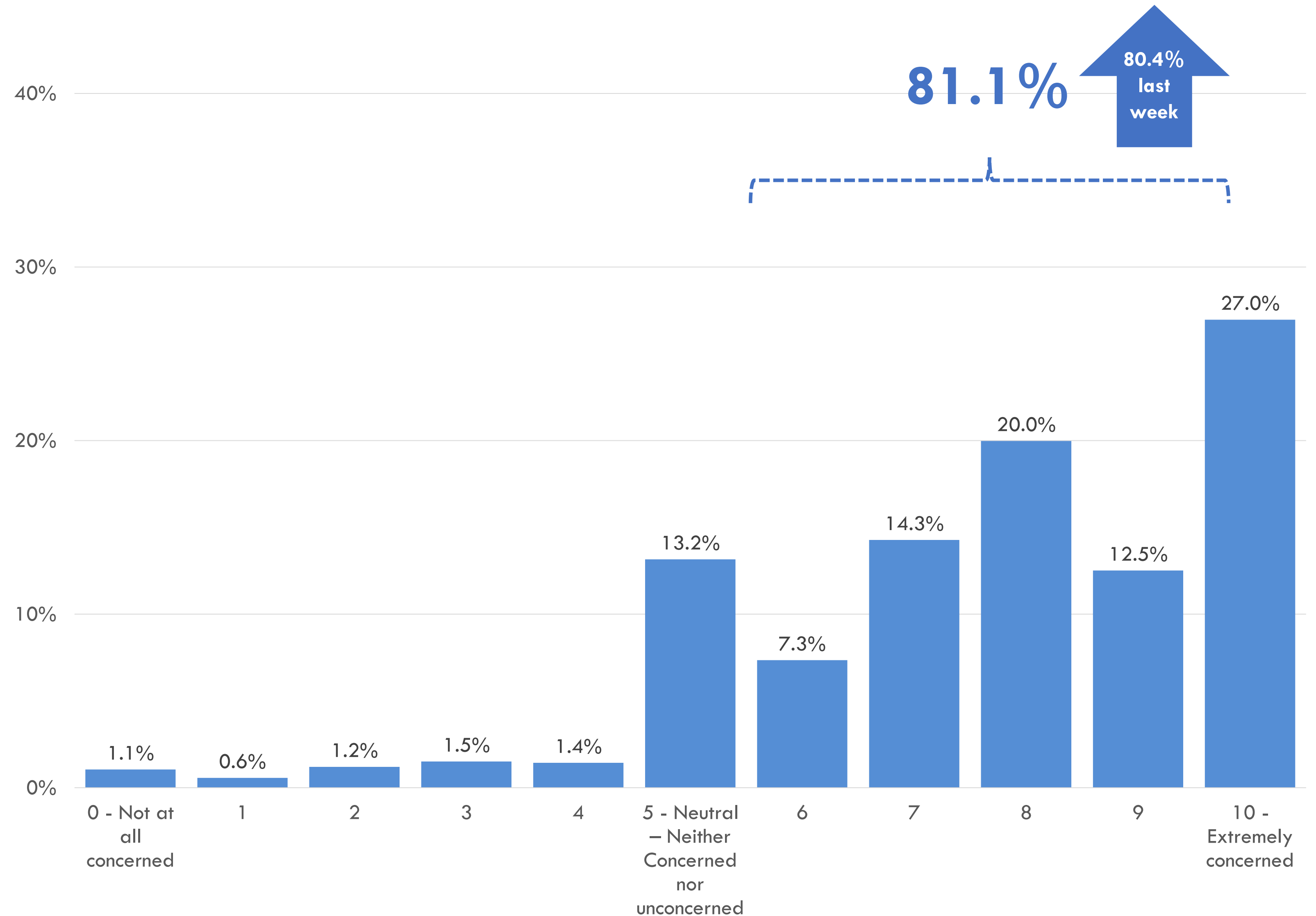


(Base: Waves 1-26. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

CONCERNS ABOUT NATIONAL ECONOMY

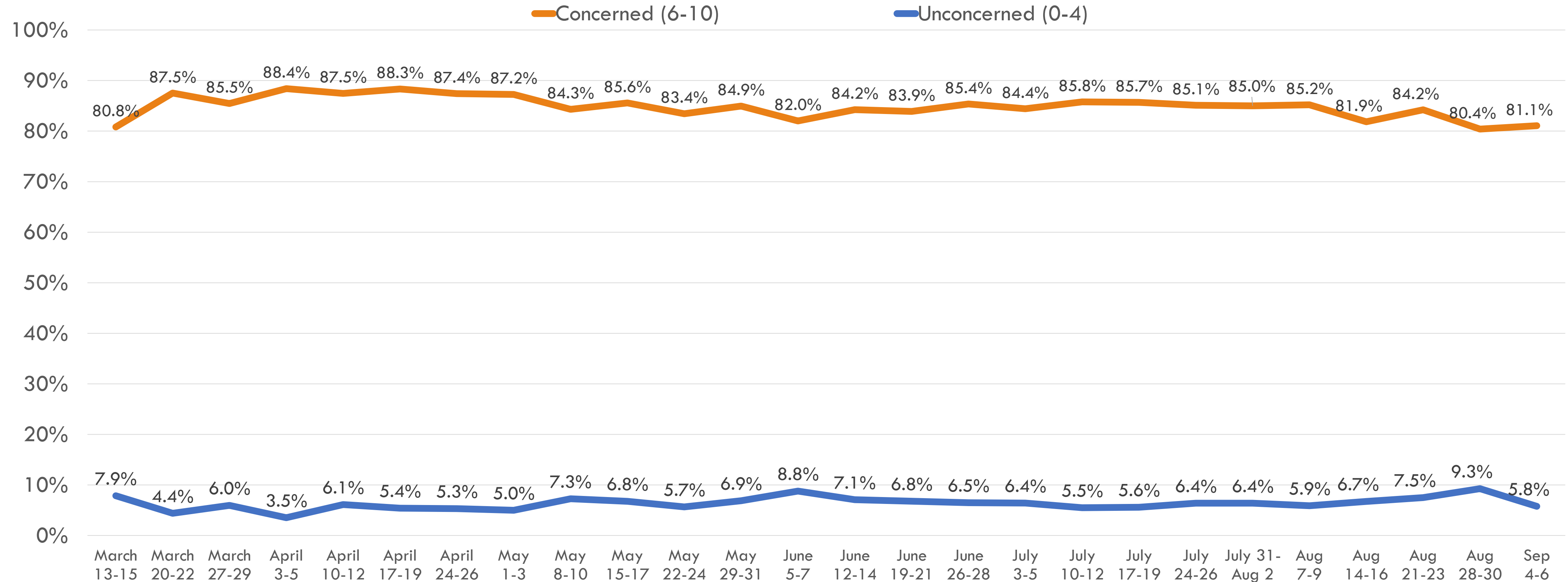
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-26)

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



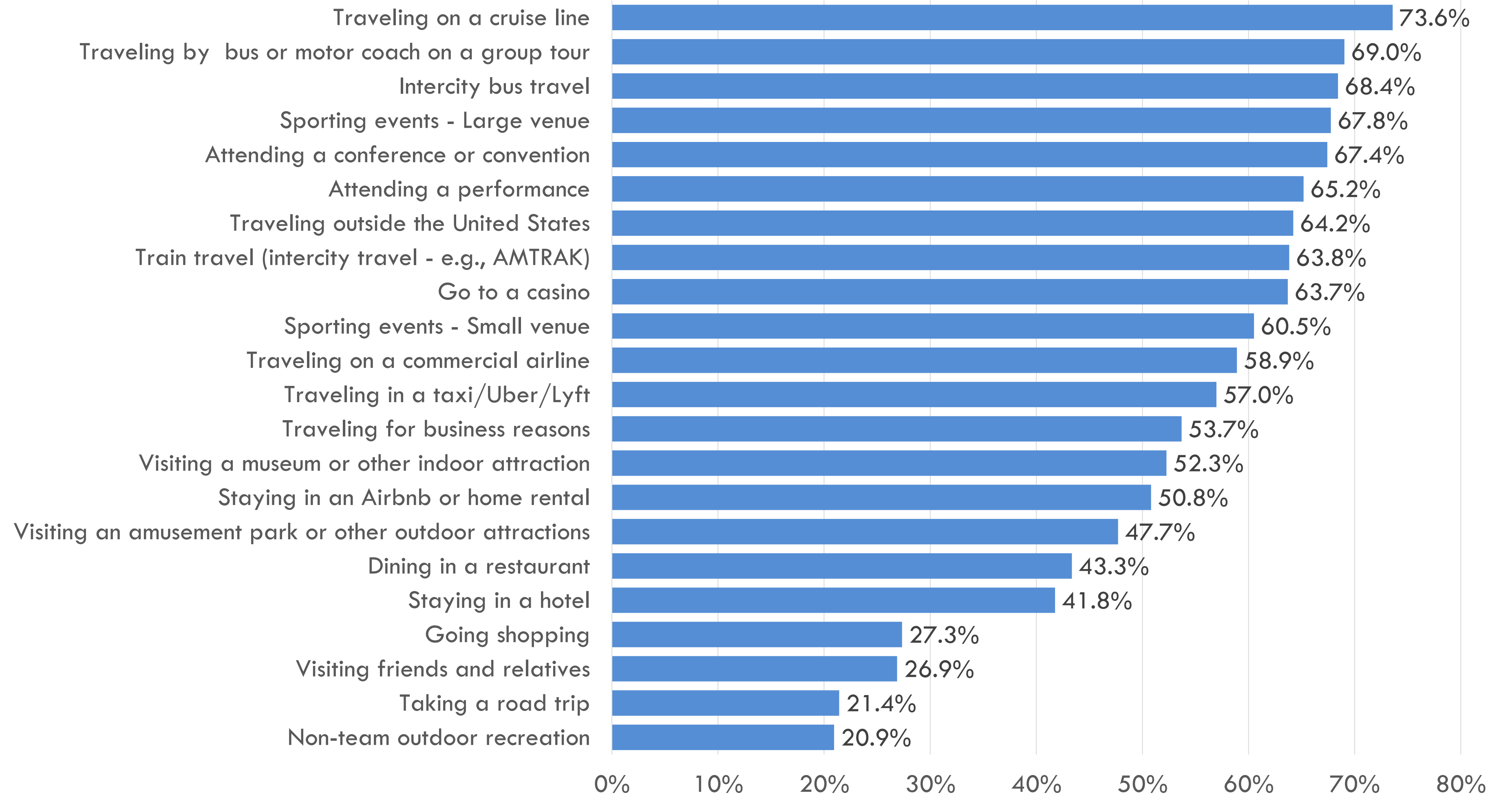
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PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 26)

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

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

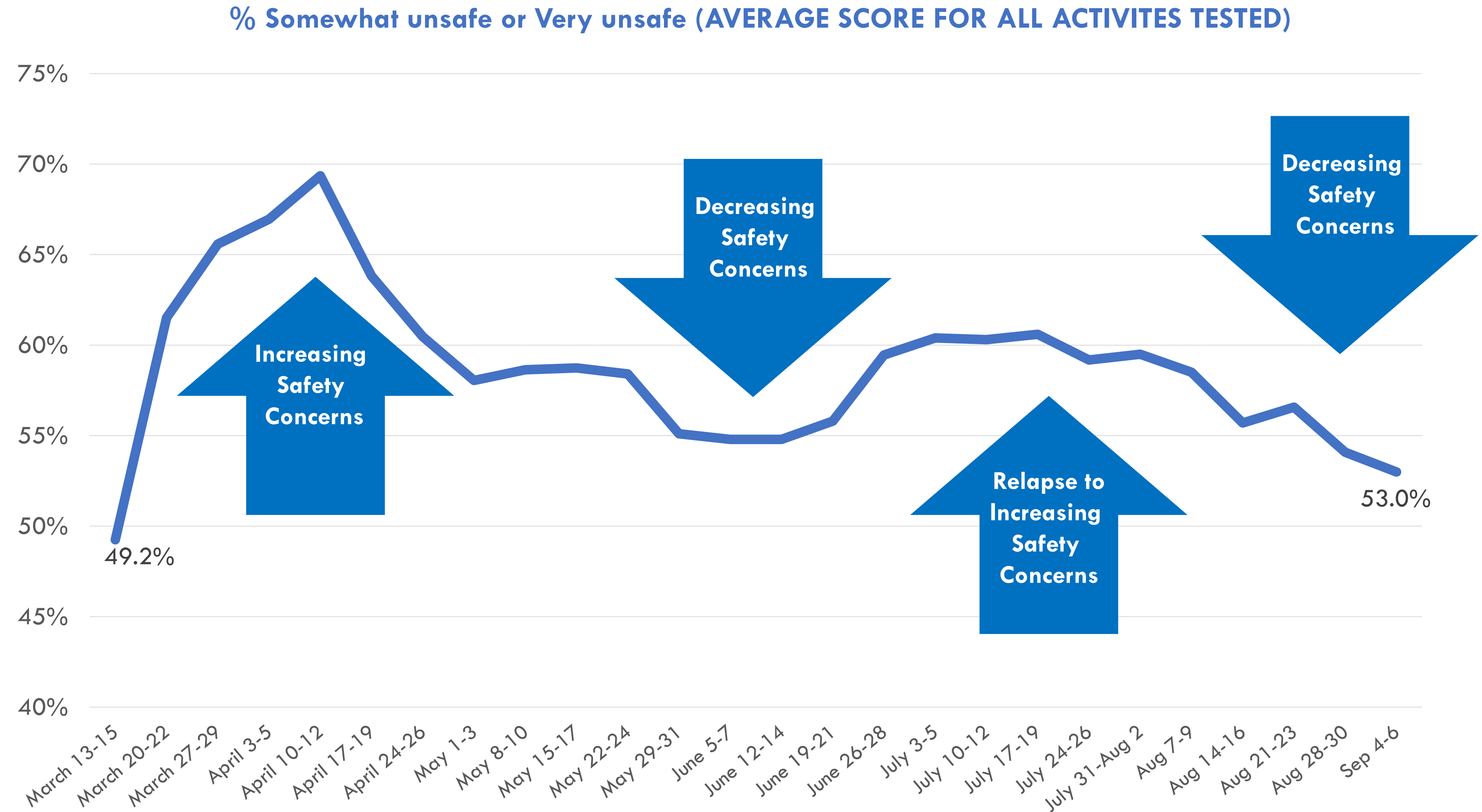
Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-26 COMPARISON)

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

(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

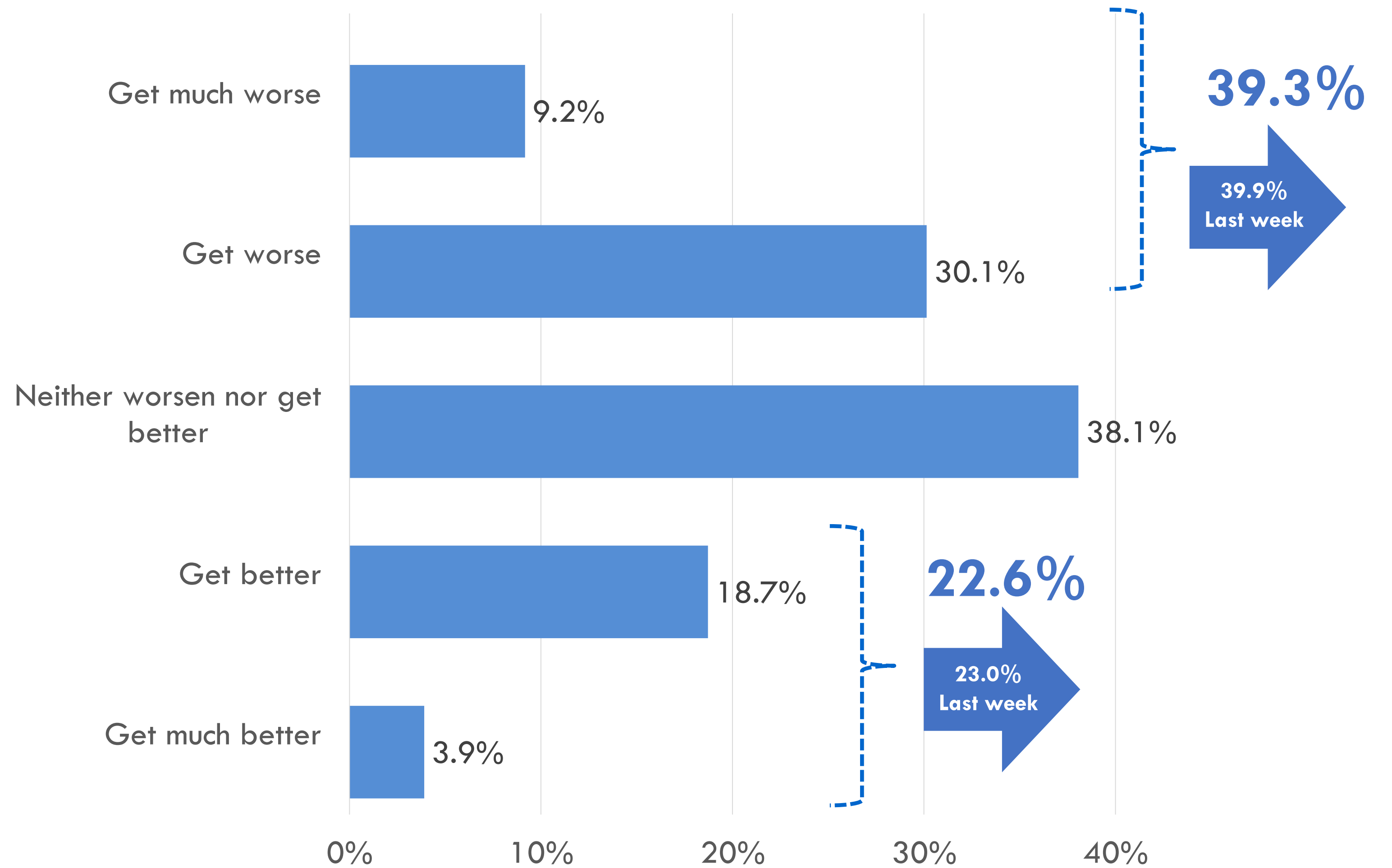


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

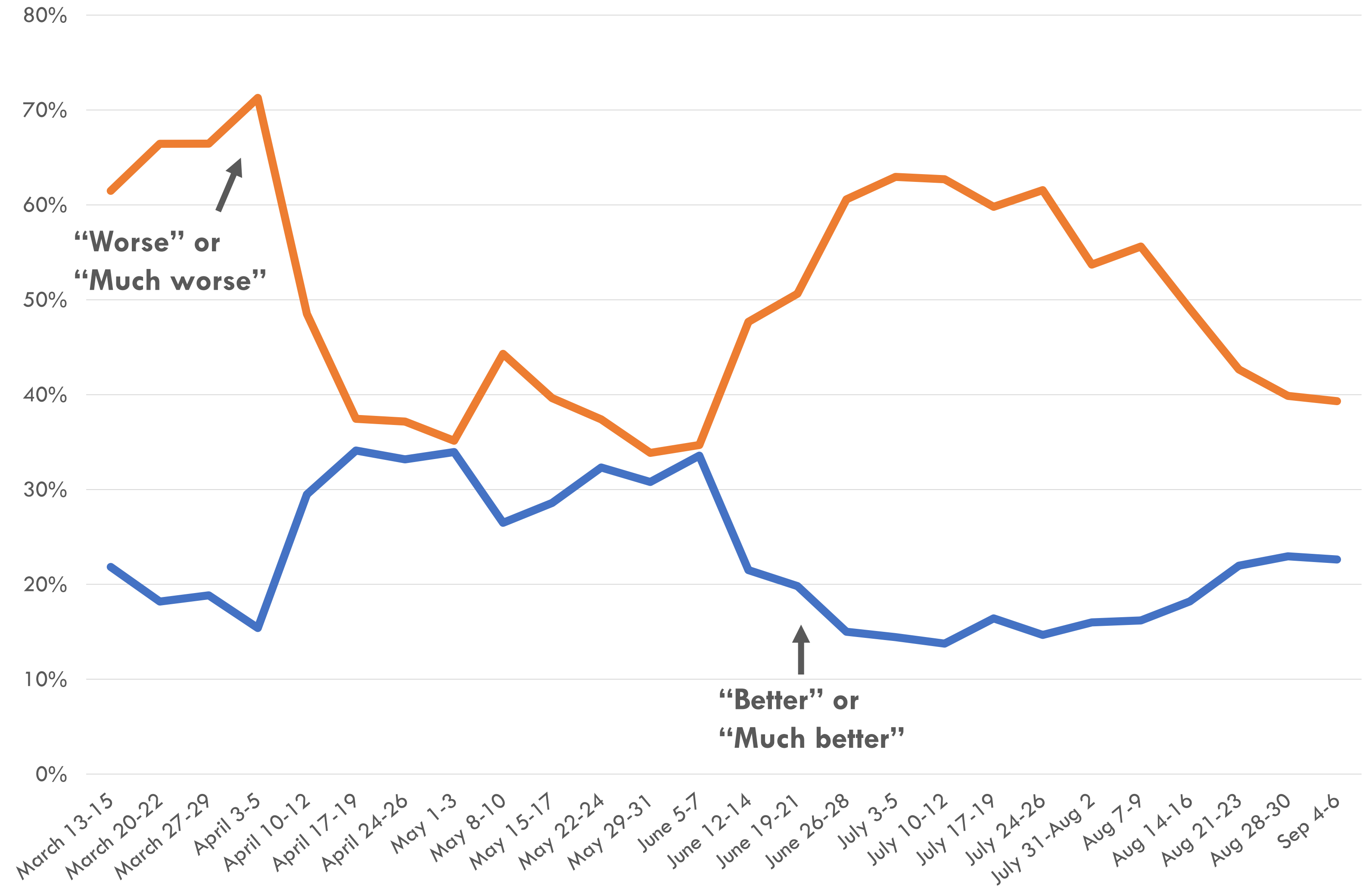


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-26)

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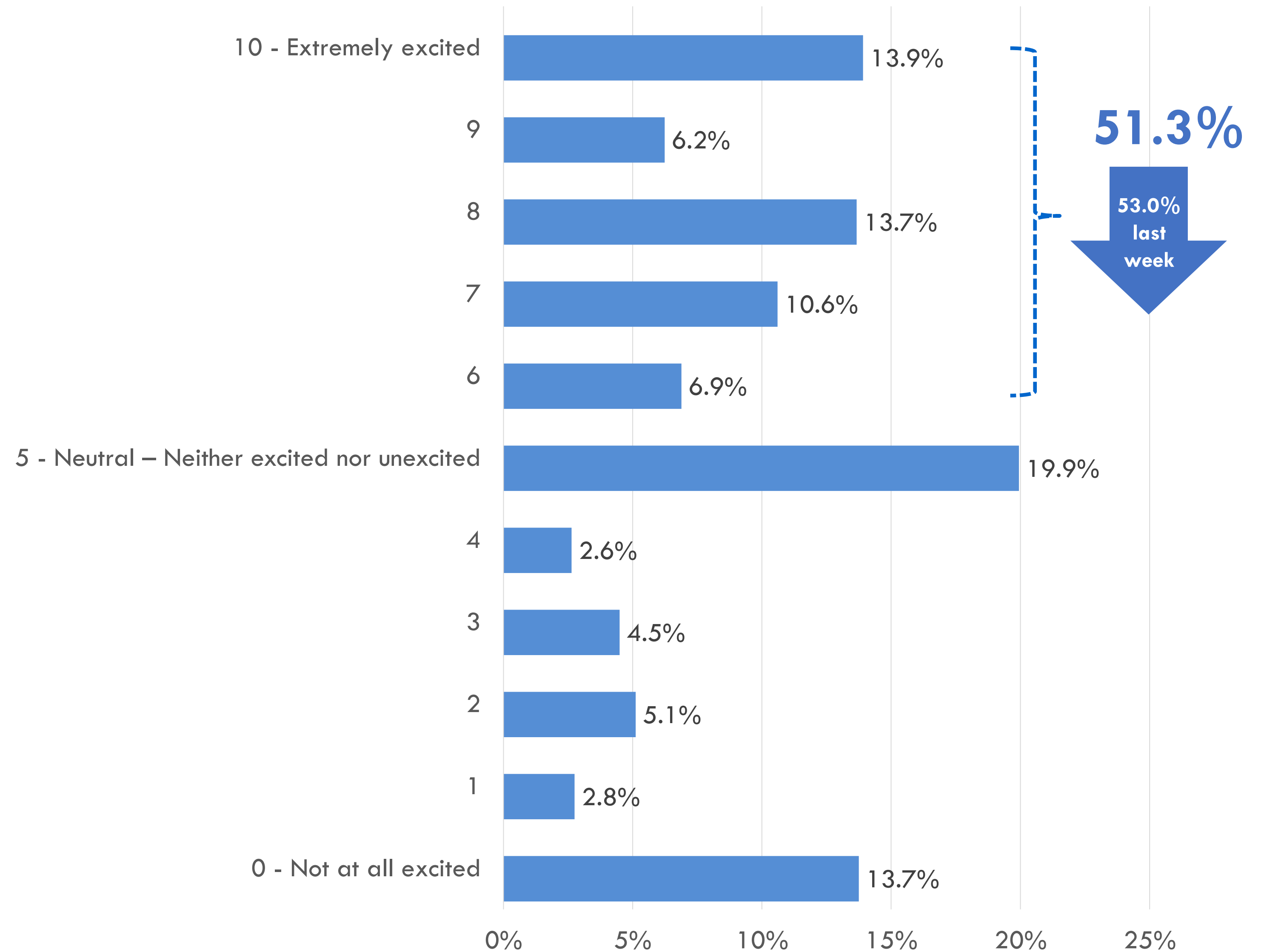


EXCITEMENT TO TRAVEL NOW

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)

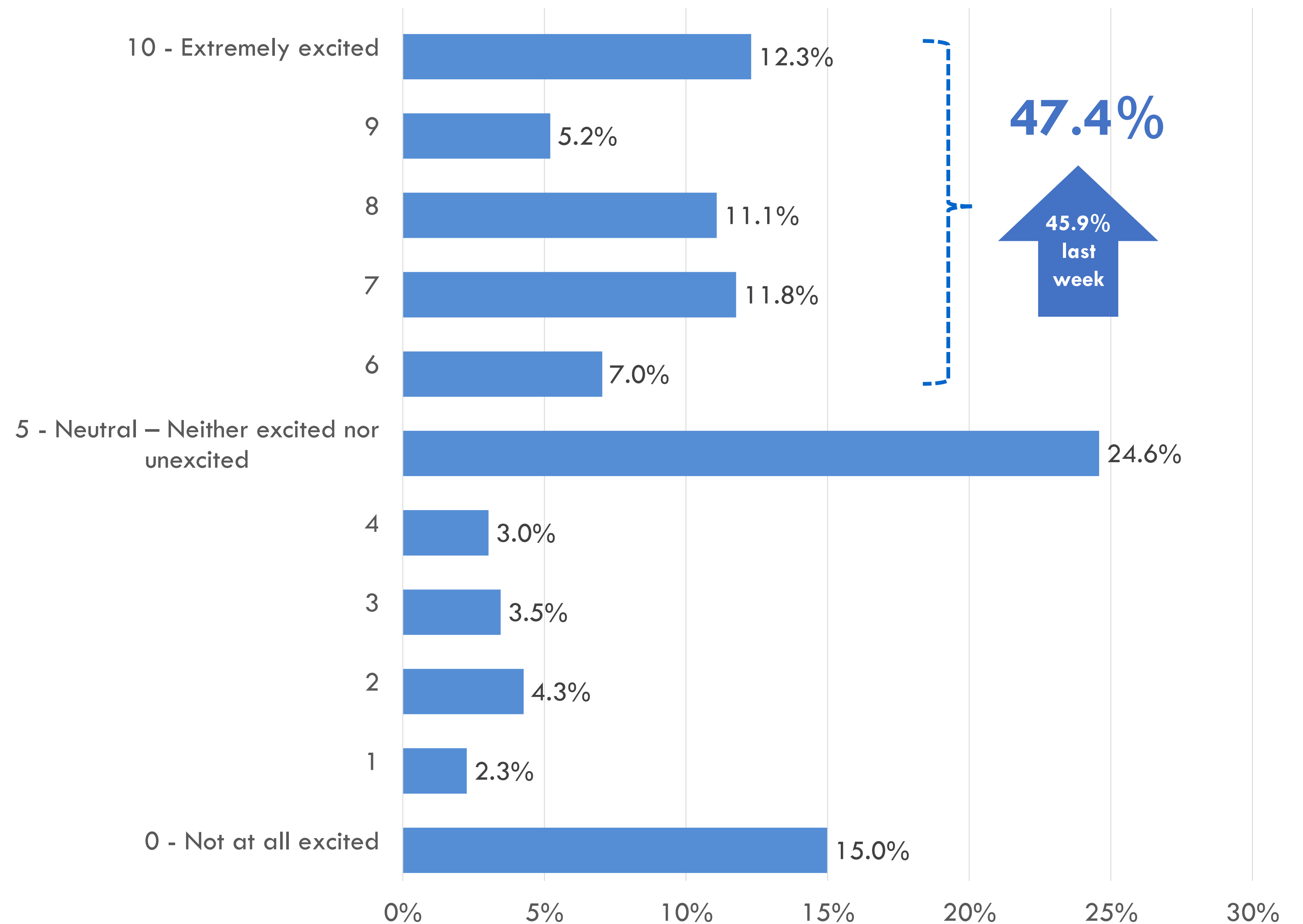
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



OPENNESS TO TRAVEL INFORMATION

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

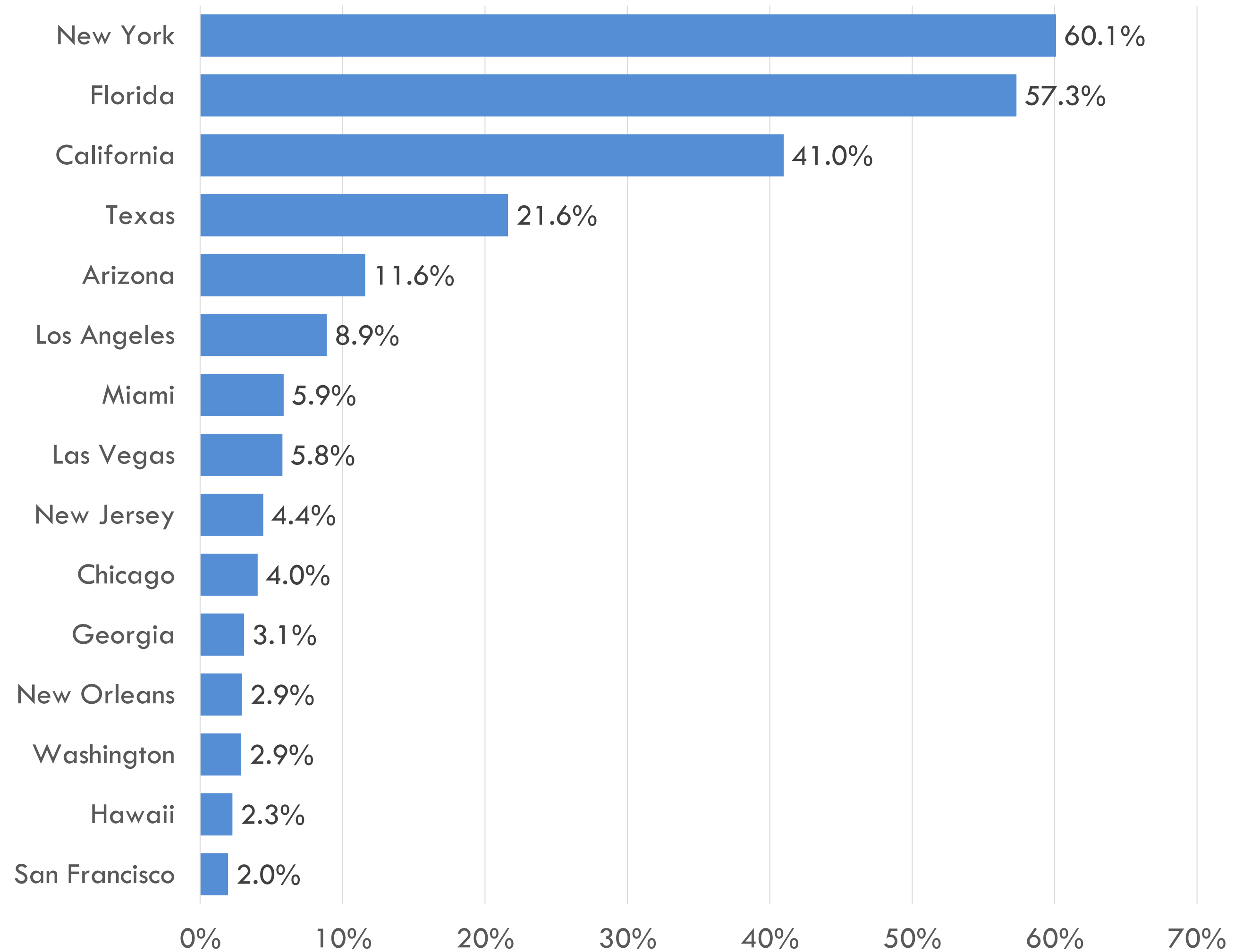
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



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)

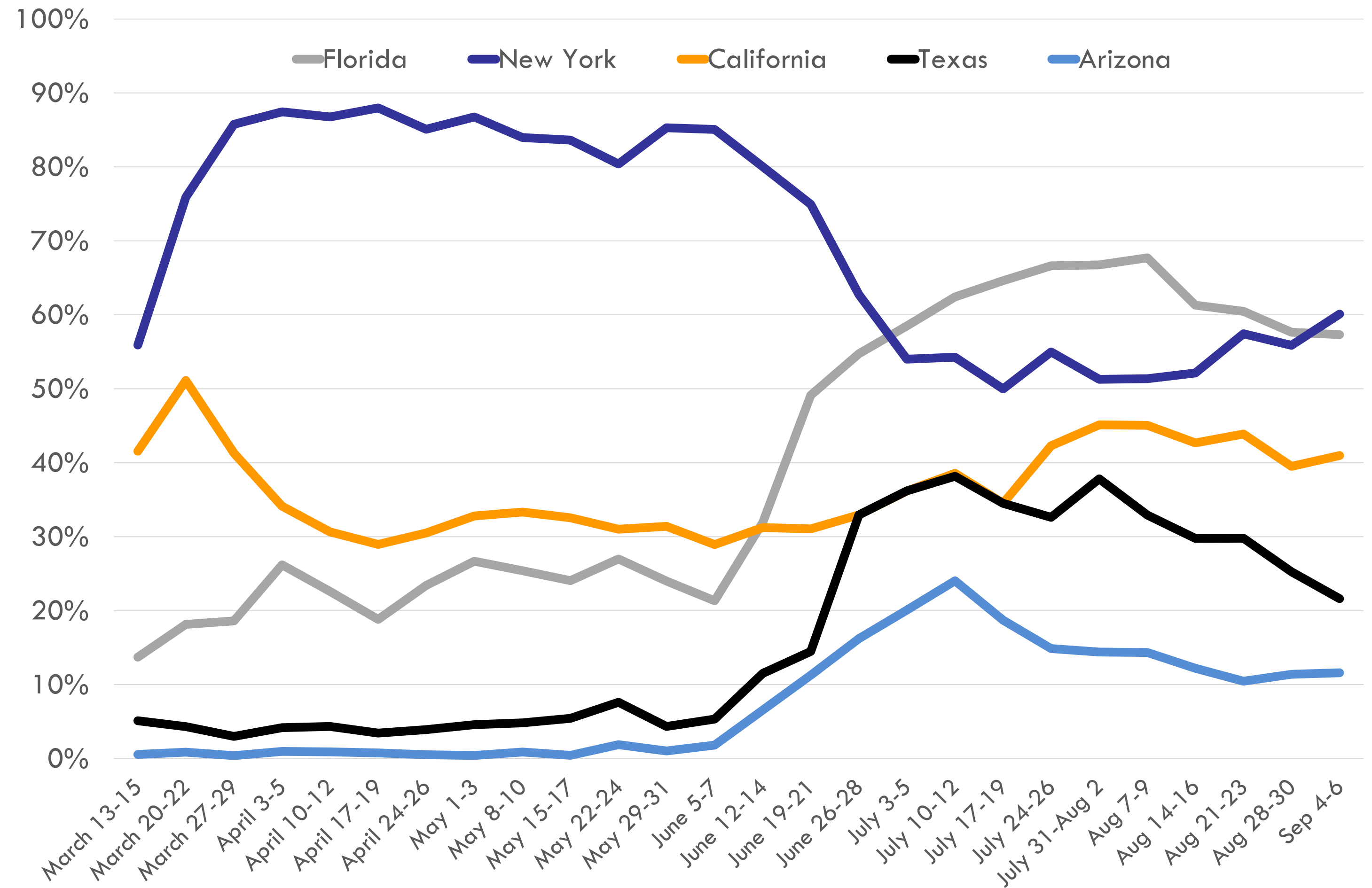
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)



MOST TALKED ABOUT CORONAVIRUS HOTSPOTS (WAVES 1-26)

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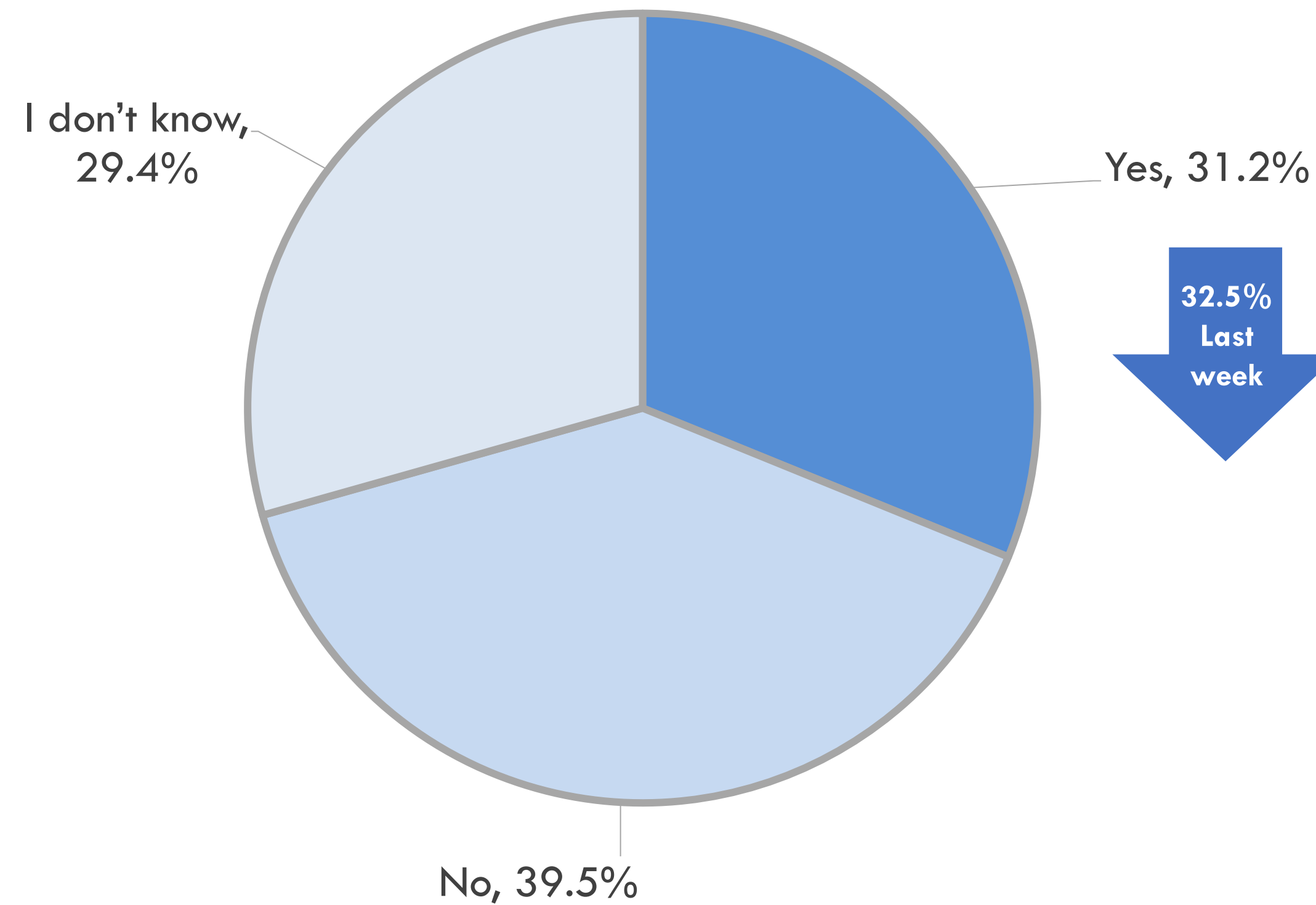
(Base: Waves 1-26. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 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, 14-16, 21-23, 28-30 and Sep 4-6, 2020)



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?

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

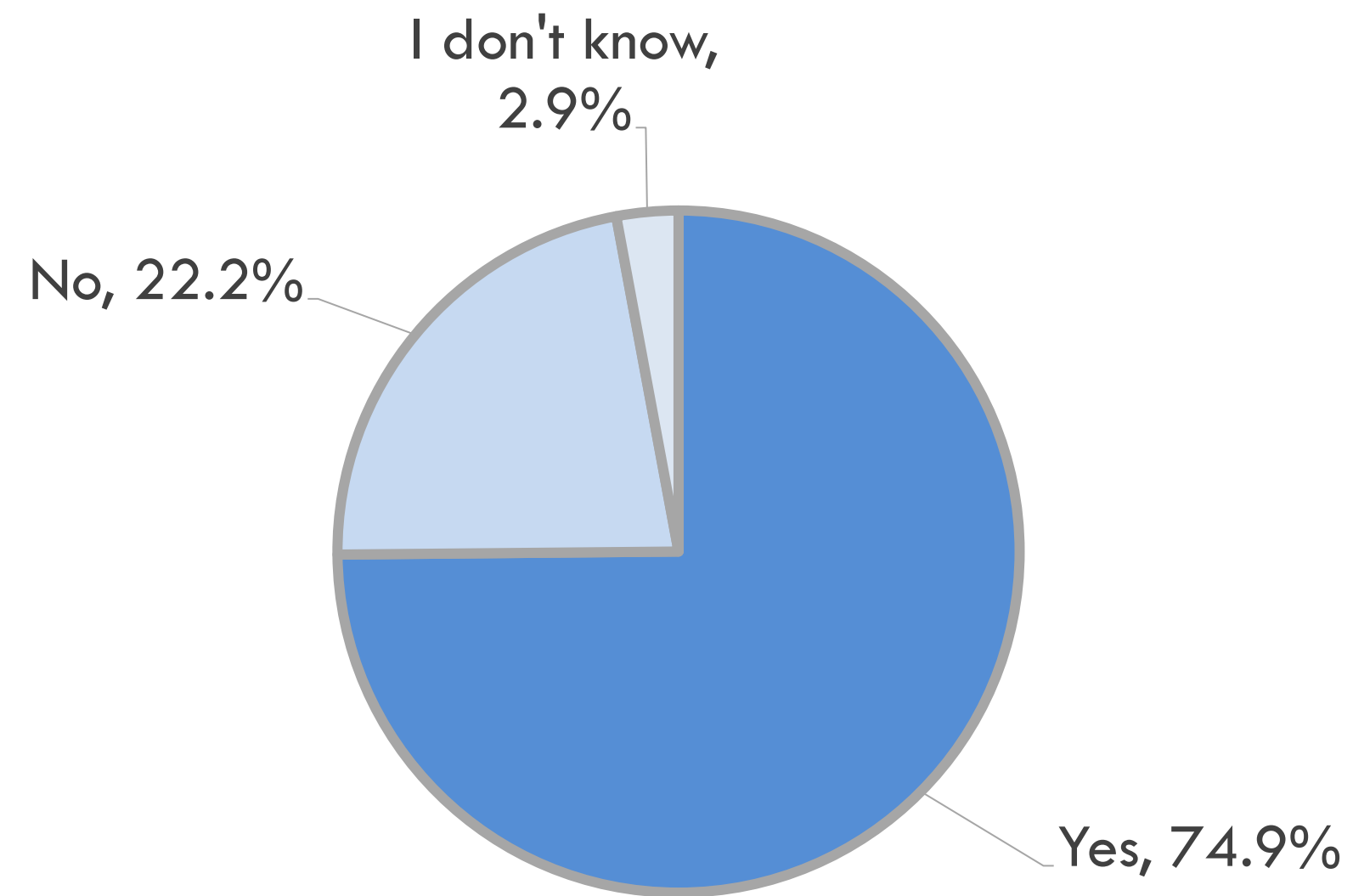


A black, ribbed suitcase sits on a light-colored, textured surface. On top of the suitcase are a blue surgical mask and a small white spray bottle. Next to the suitcase is a pair of blue jeans, a pair of glasses, a light-colored straw hat, and a brown drawstring bag. The suitcase handle is extended to the right.

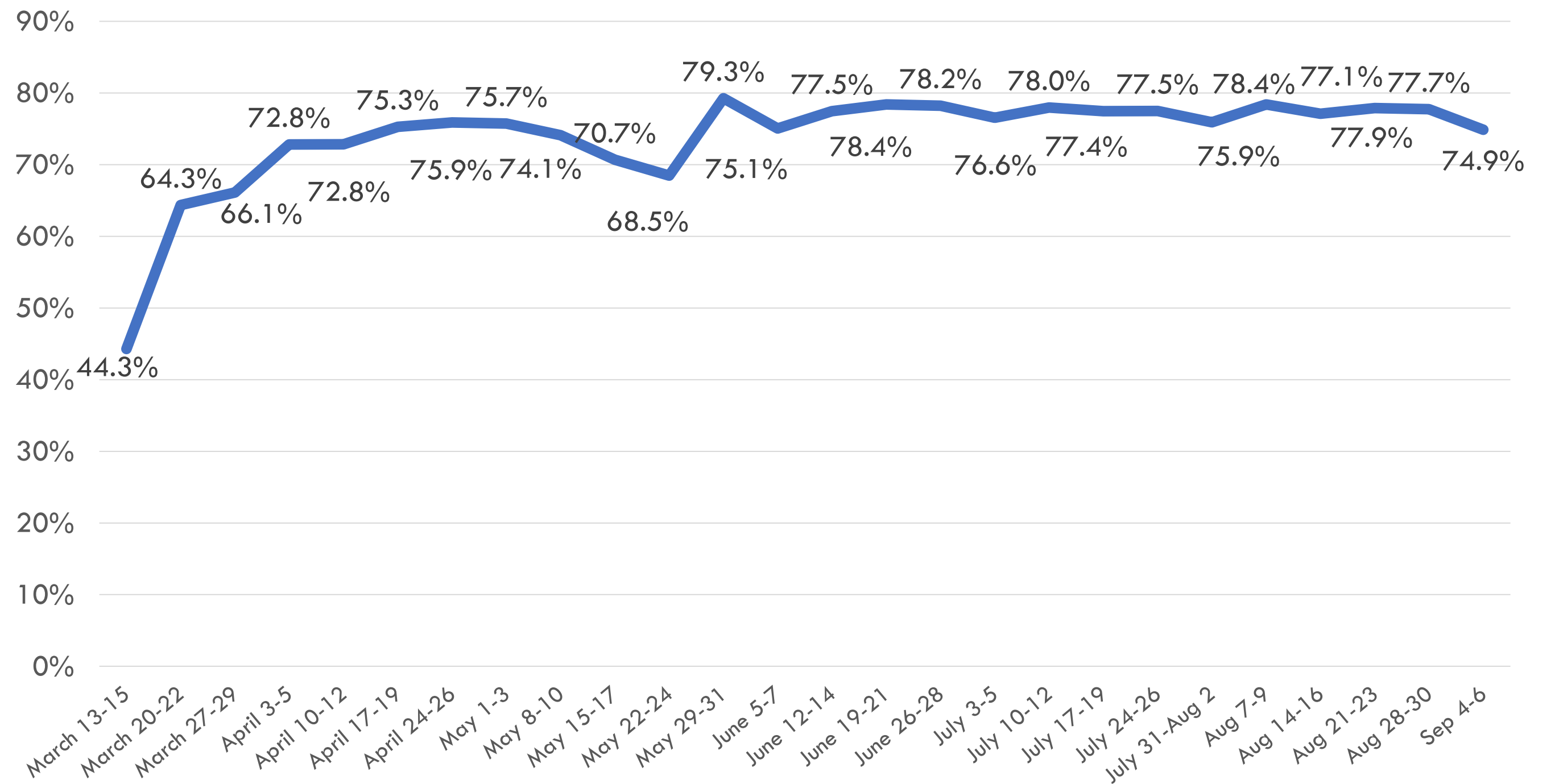
THE PANDEMIC'S IMPACT ON TRAVEL

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



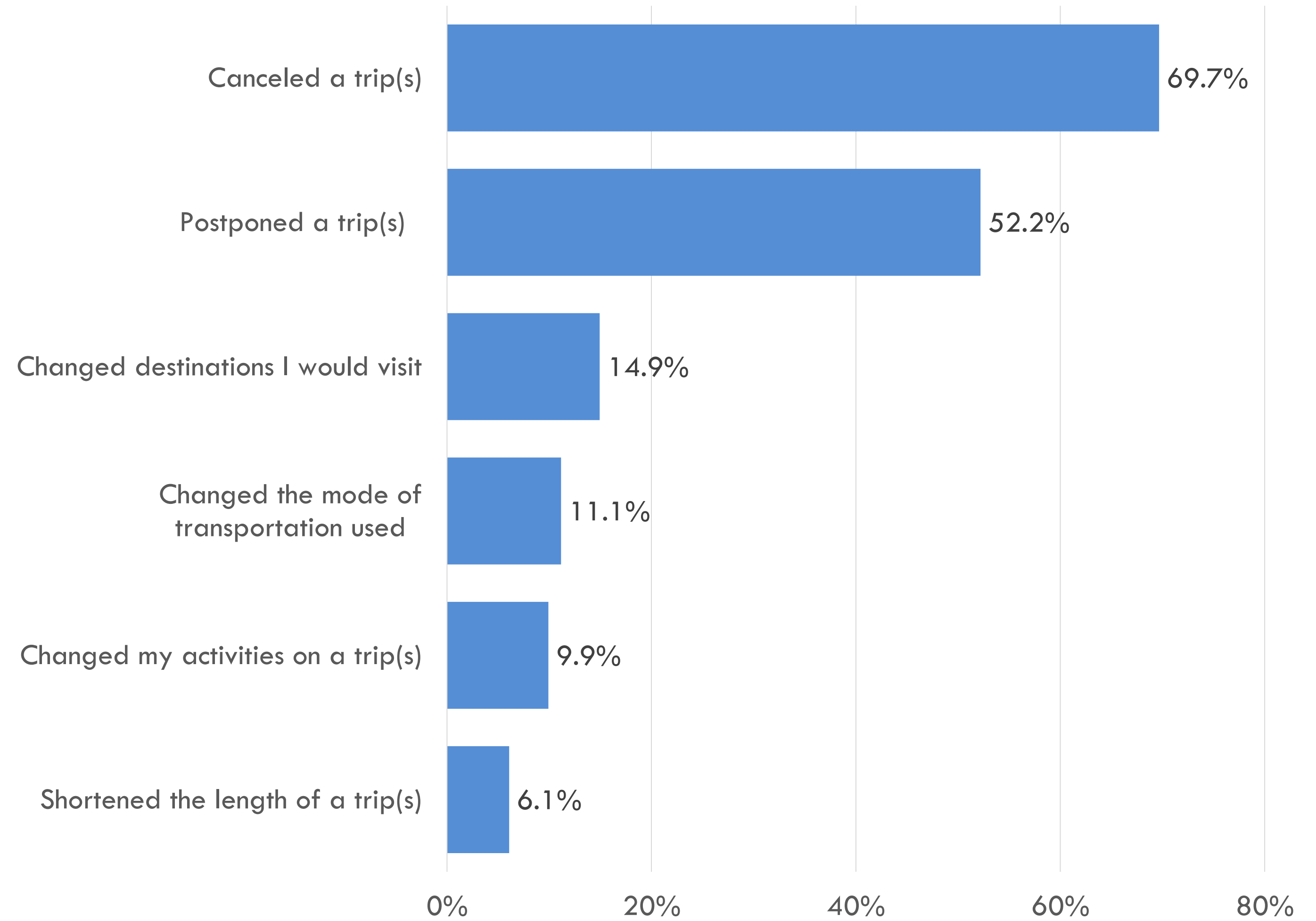
(Base: Waves 1-26. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

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_____.

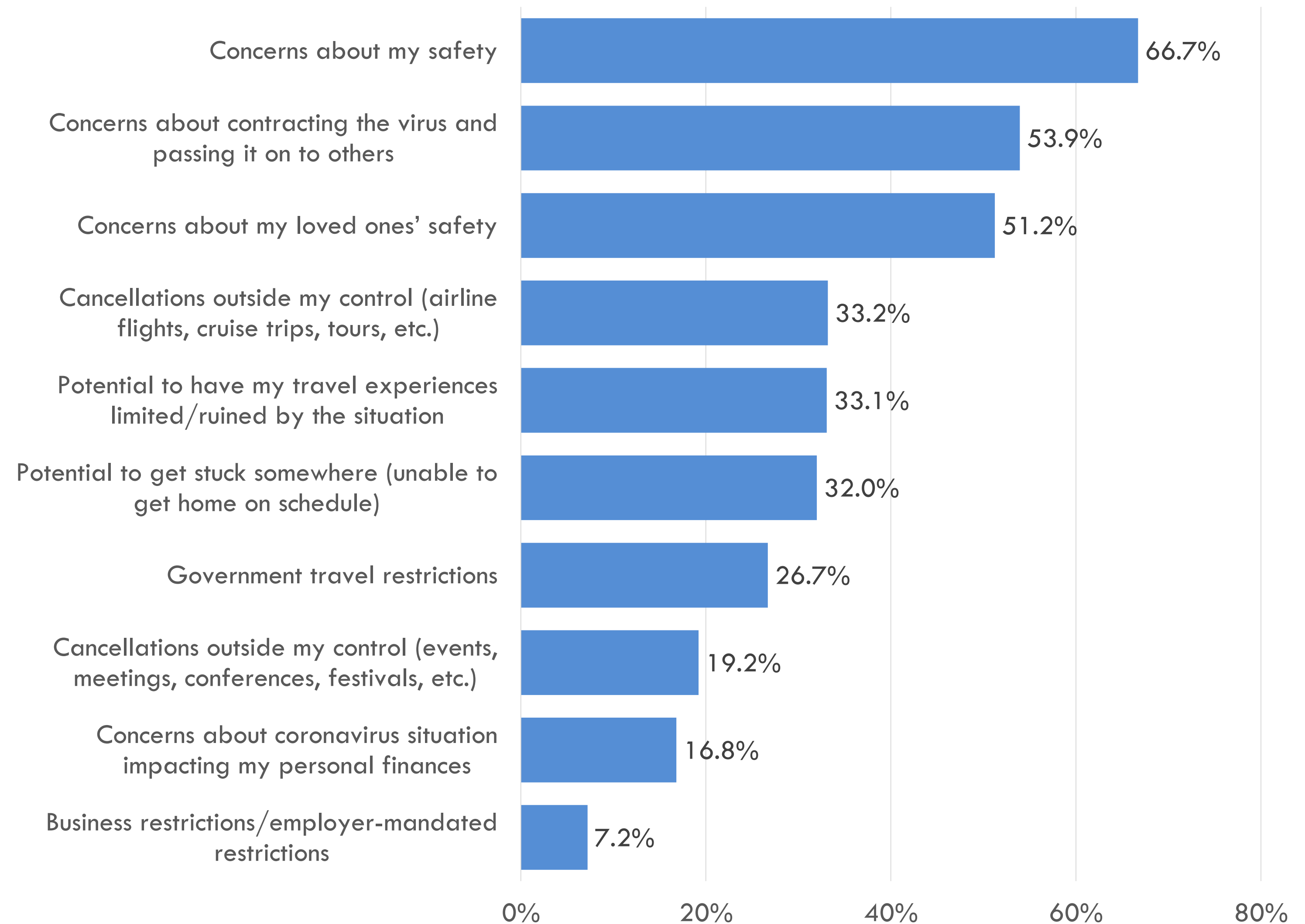
(Base: Wave 26. Respondents whose travel was impacted by the coronavirus, 926 completed surveys. Data collected Sep 4-6, 2020)



WHY THE CORONAVIRUS IS IMPACTING TRAVEL

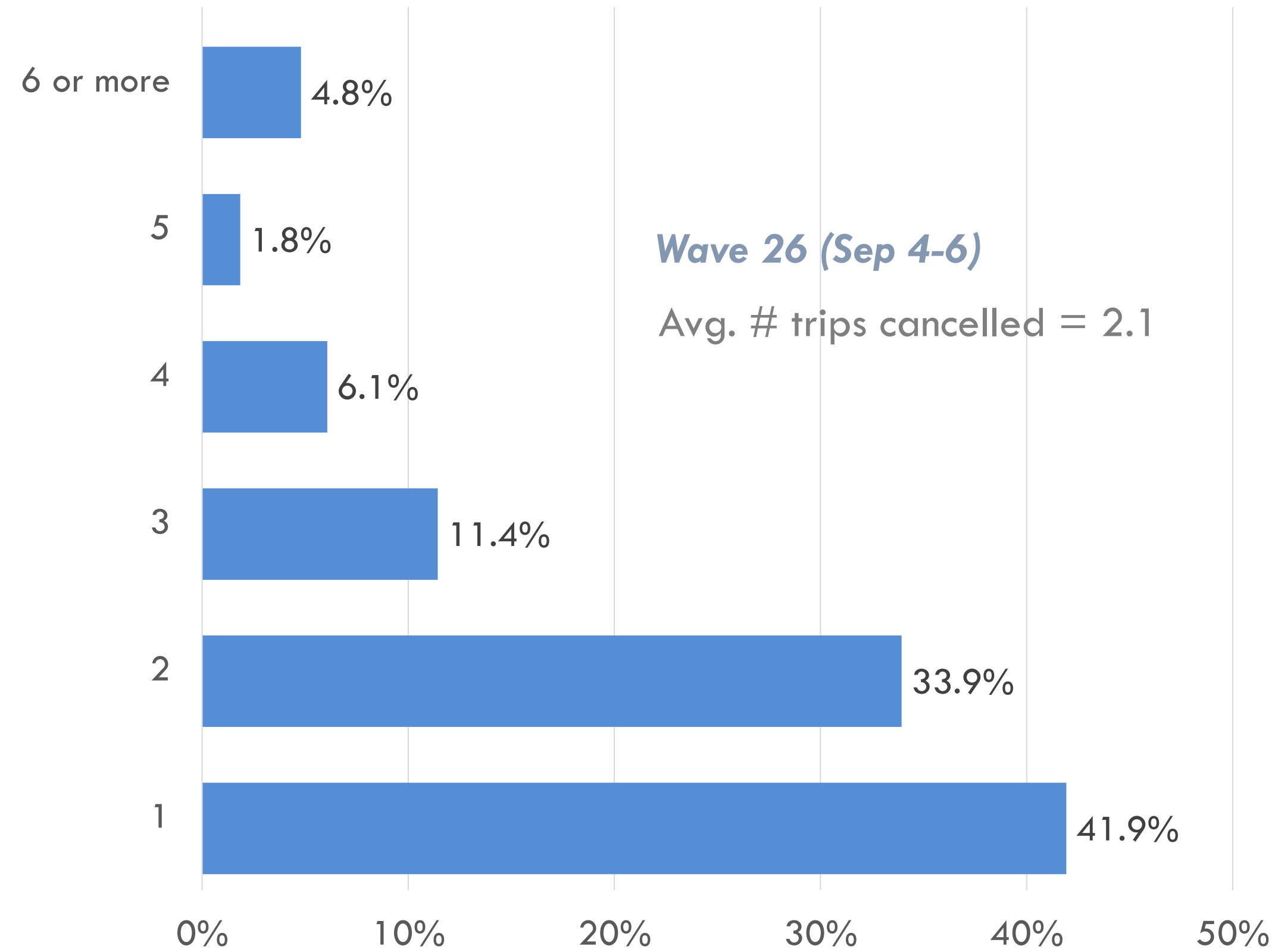
Question: Which of the following are reasons the coronavirus situation has changed your travels?

(Base: Wave 26. Respondents whose travel was impacted by the coronavirus, 922 completed surveys. Data collected Sep 4-6, 2020)

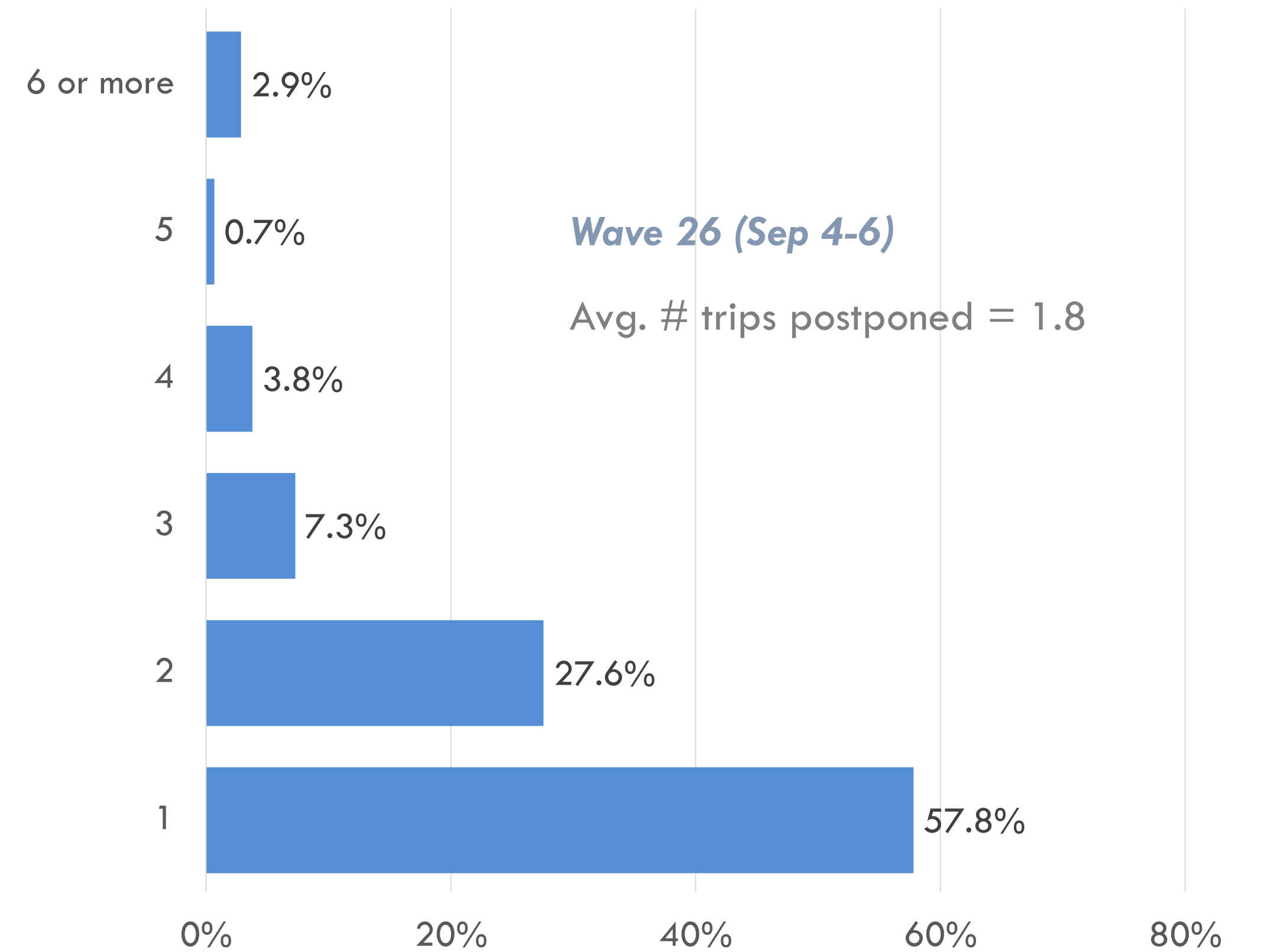


TRIPS CANCELLED/POSTPONED

Question: How many trips did you cancel?



Question: How many trips did you postpone?

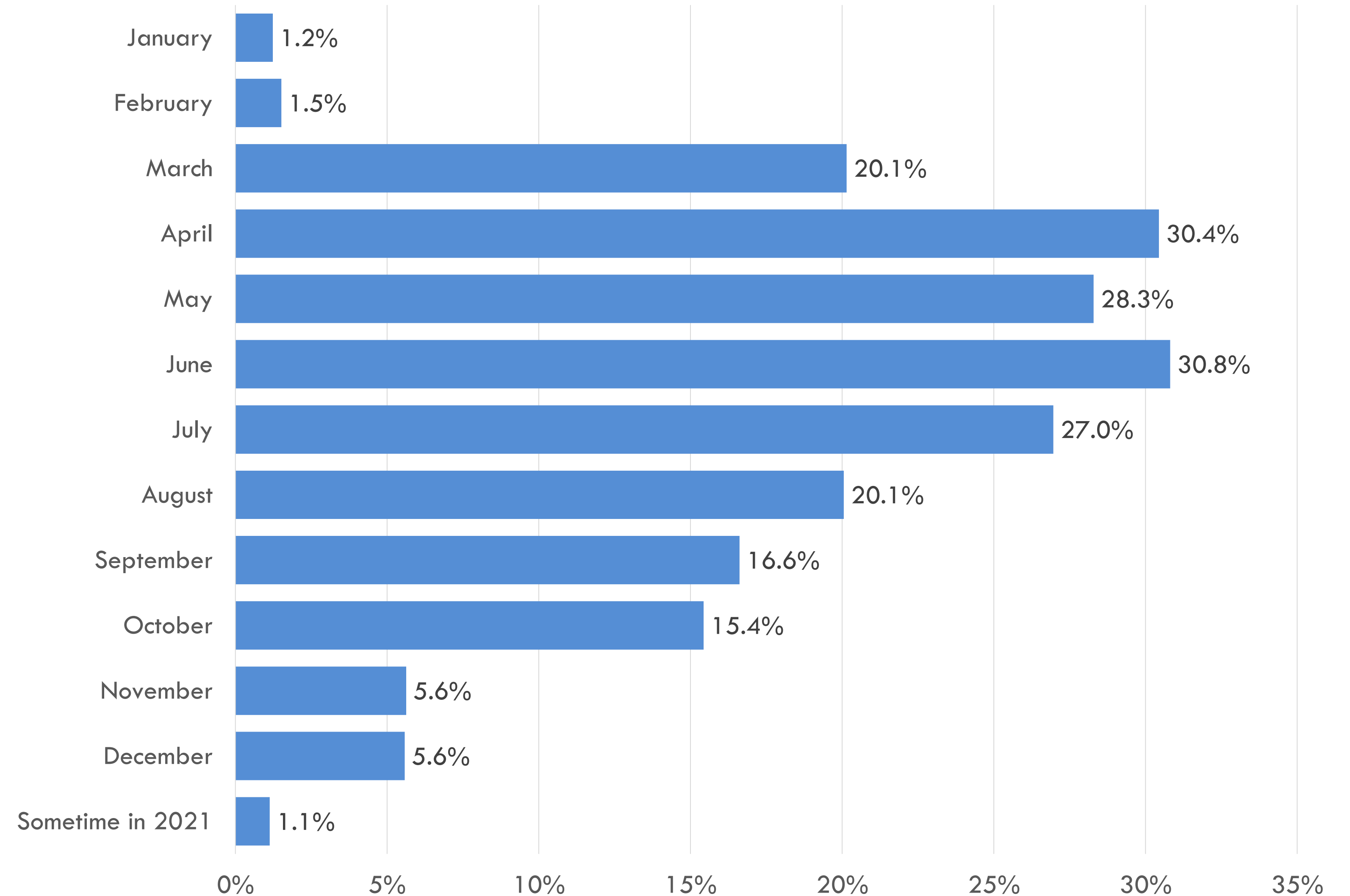


(Base: Wave 26 data. Respondents cancelling/postponing a trip, 654/486 completed surveys. Data collected Sep 4-6, 2020)

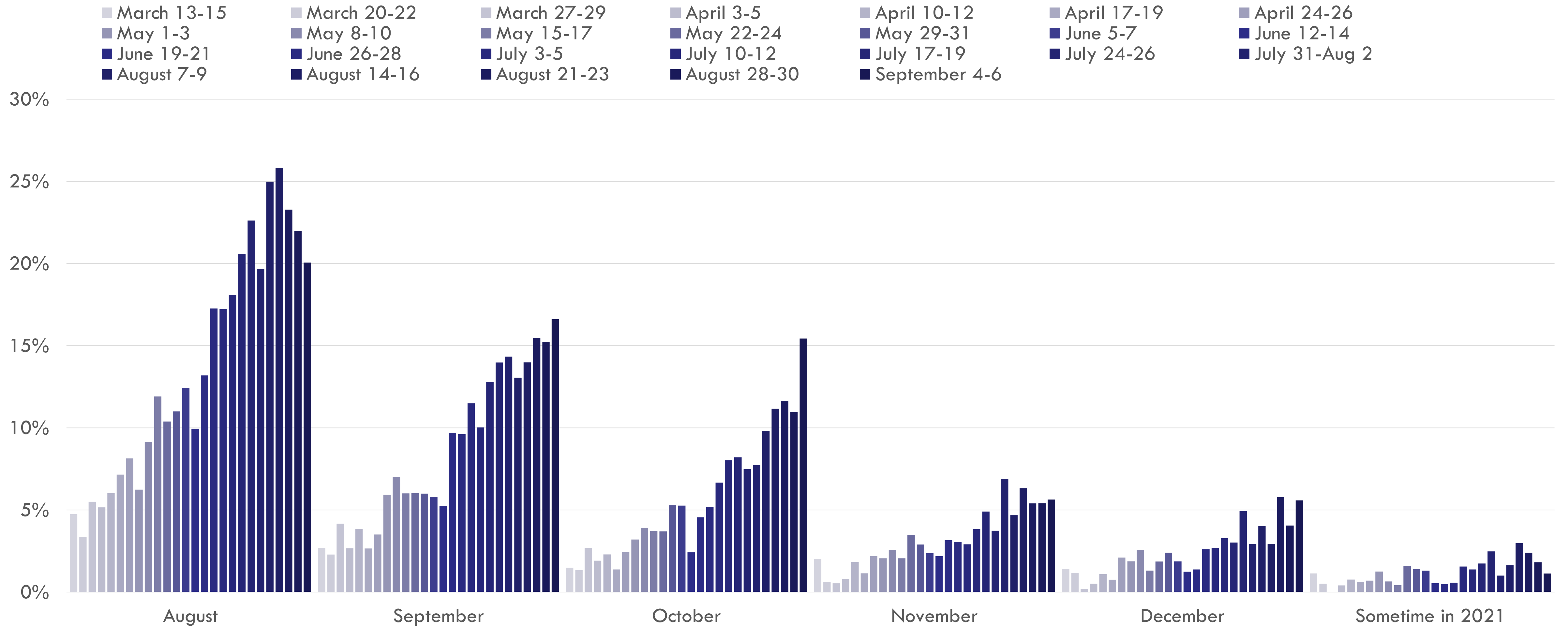
MONTH OF TRIP CANCELLATION

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

(Base: Wave 26 data. Respondents cancelling a trip, 654 completed surveys. Data collected Sep 4-6, 2020)



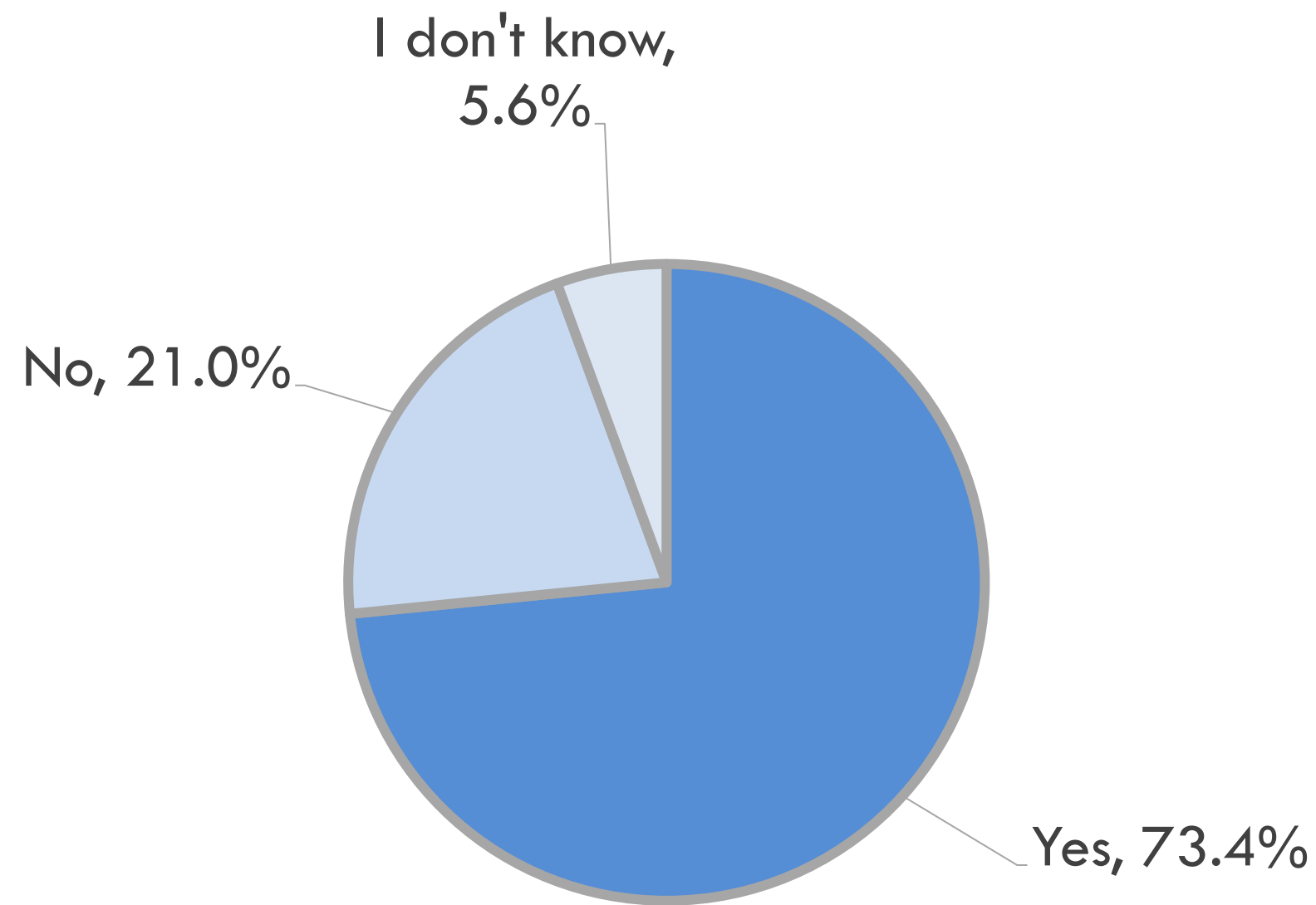
MONTH OF TRIP CANCELLATION



(Base: Waves 1-26. Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728, 675, 672, 664, 687, 626, 620, 636 and 654 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, July 31-Aug 2, Aug 7-9, 14-16, 21-23, 28-30 and Sep 4-6, 2020)

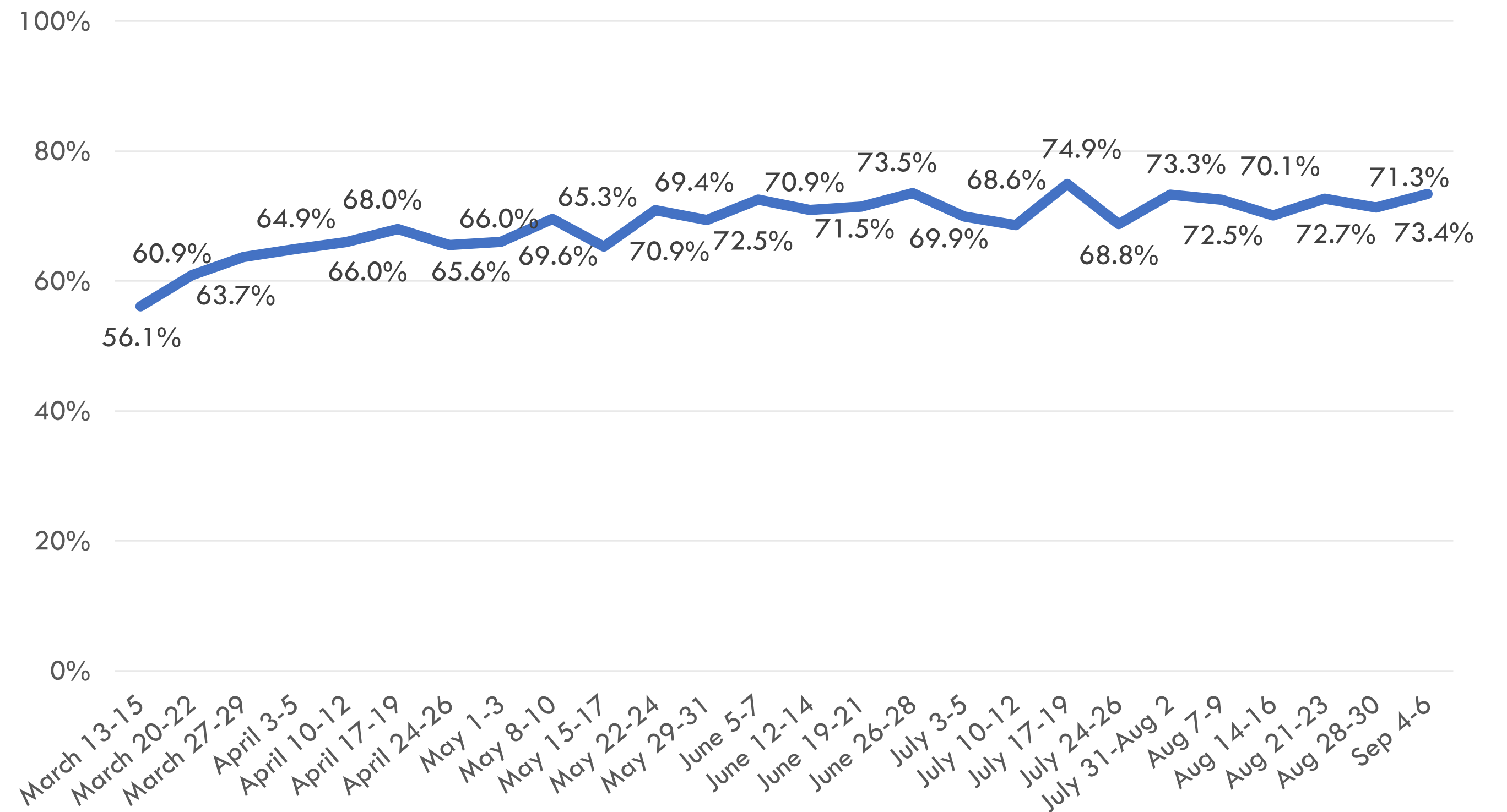
DID TRAVELER GET FULL REFUNDS?

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



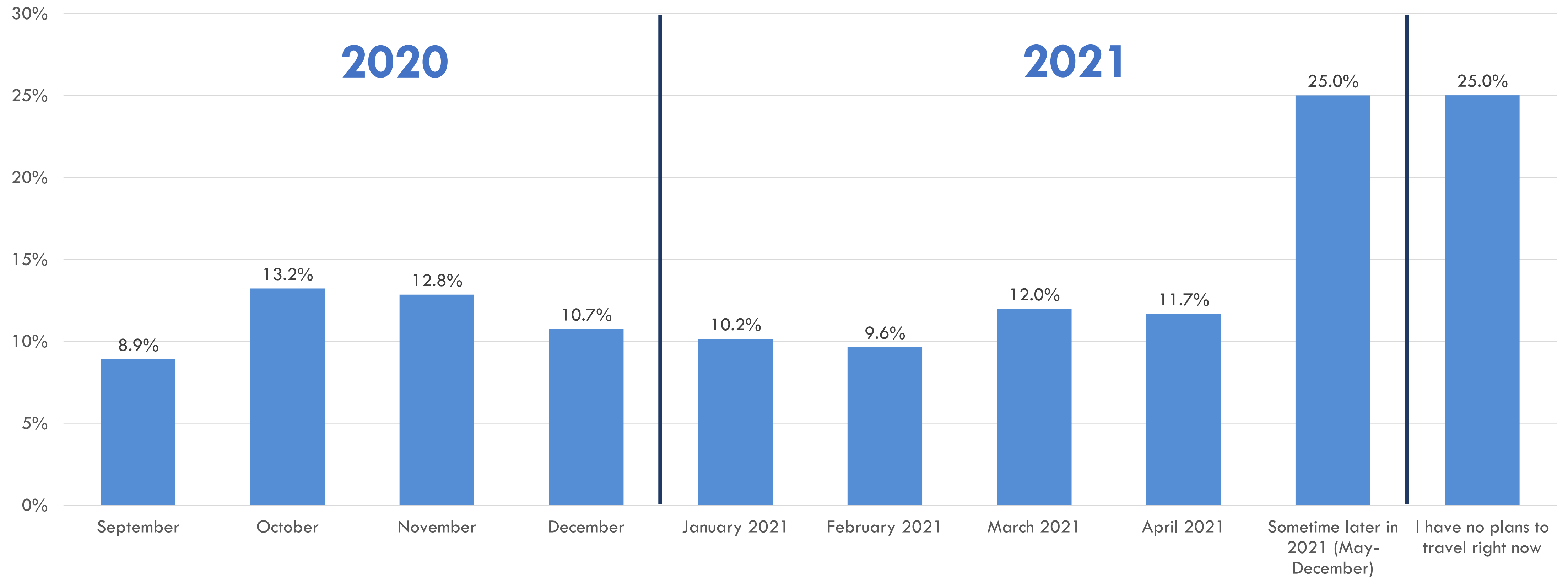
(Base: Wave 26 data. Respondents cancelling a trip, 654 completed surveys. Data collected Sep 4-6, 2020)

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?

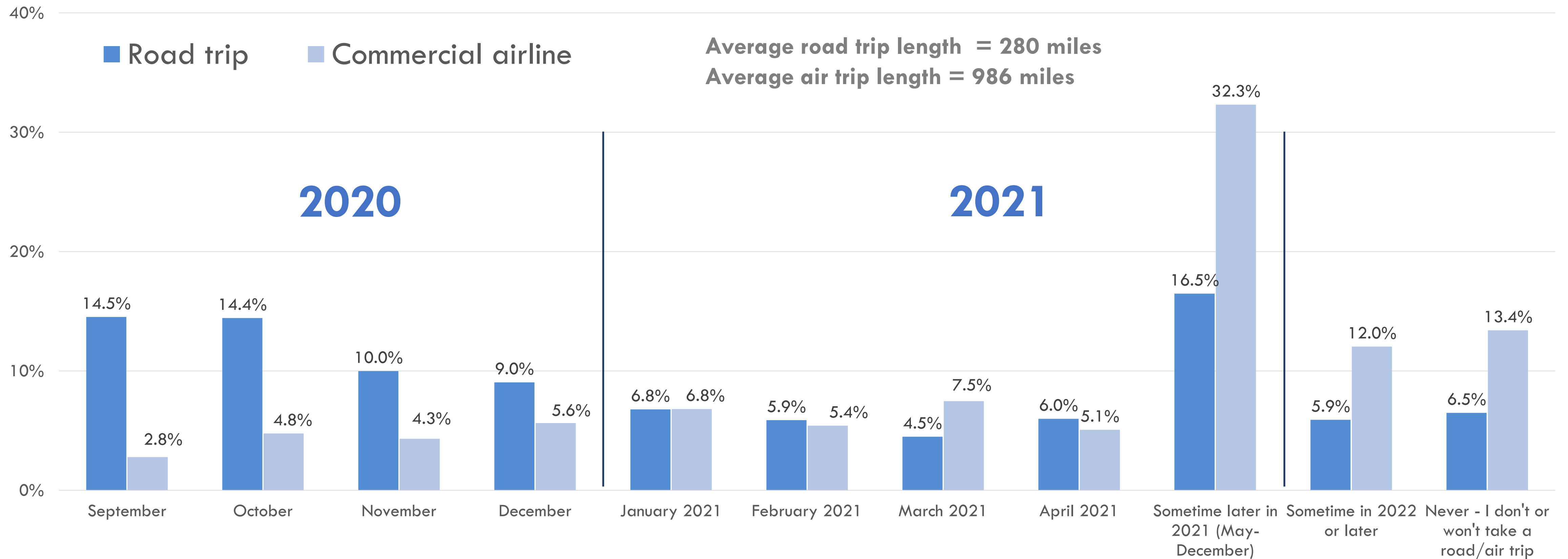


(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

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?

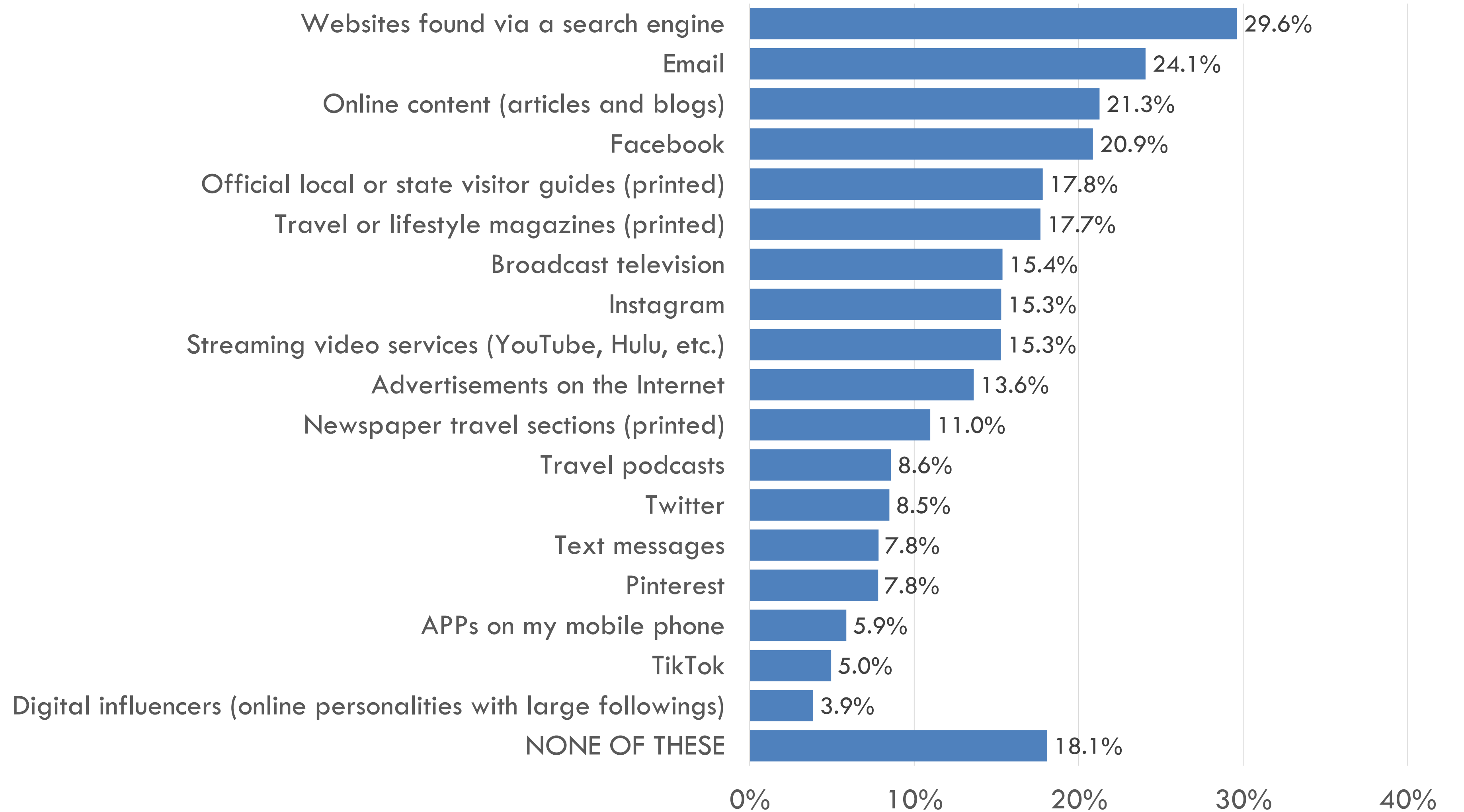


(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected Sep 4-6, 2020)

RECEPTIVITY TO TRAVEL PLANNING RESOURCES

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit? (Please select all that apply)]

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)



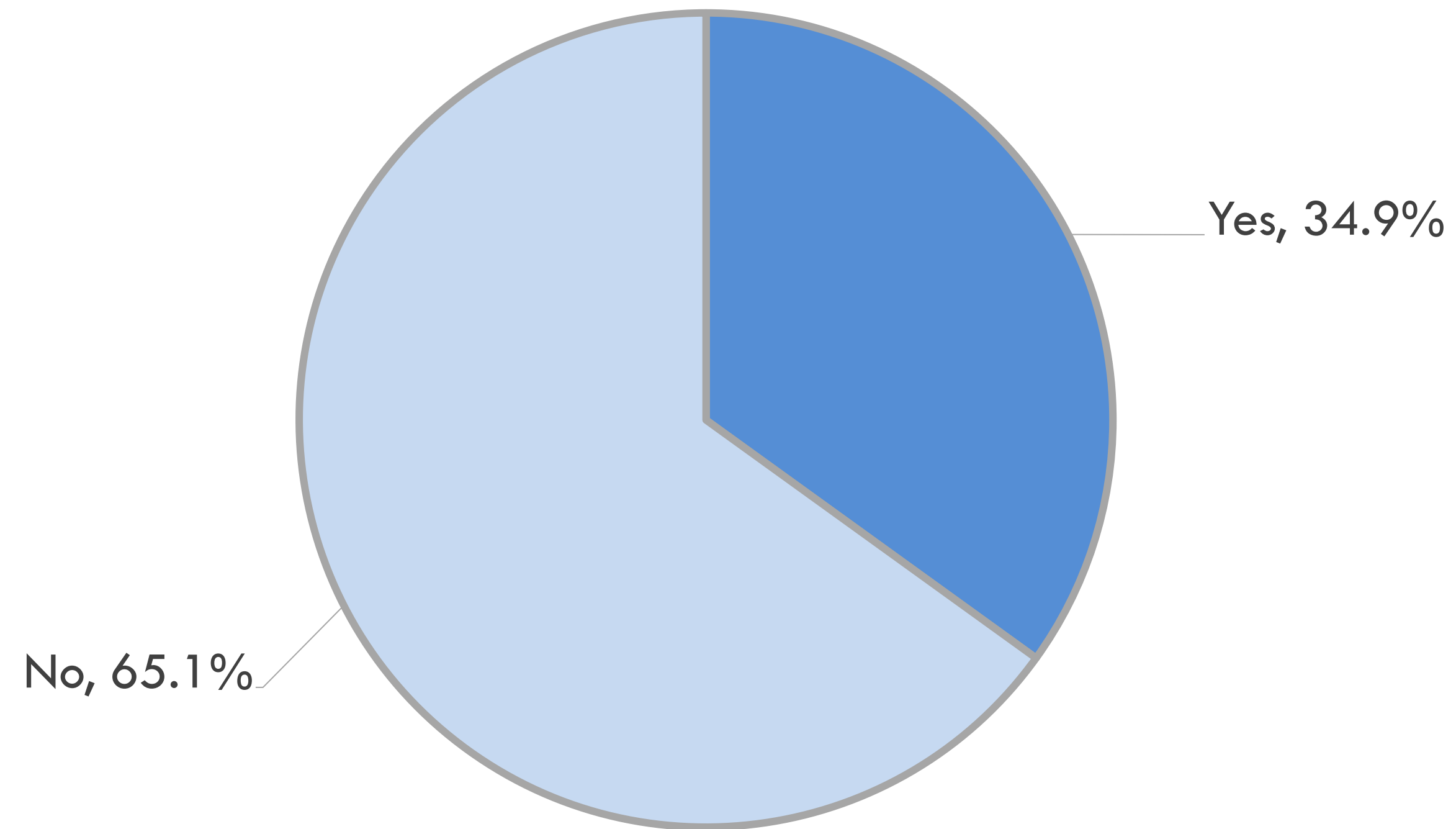


SUMMER 2020 TRAVEL

LEISURE TRIPS TAKEN

Question: Have you taken any trips for leisure or personal reasons this summer (June 1 to today)?

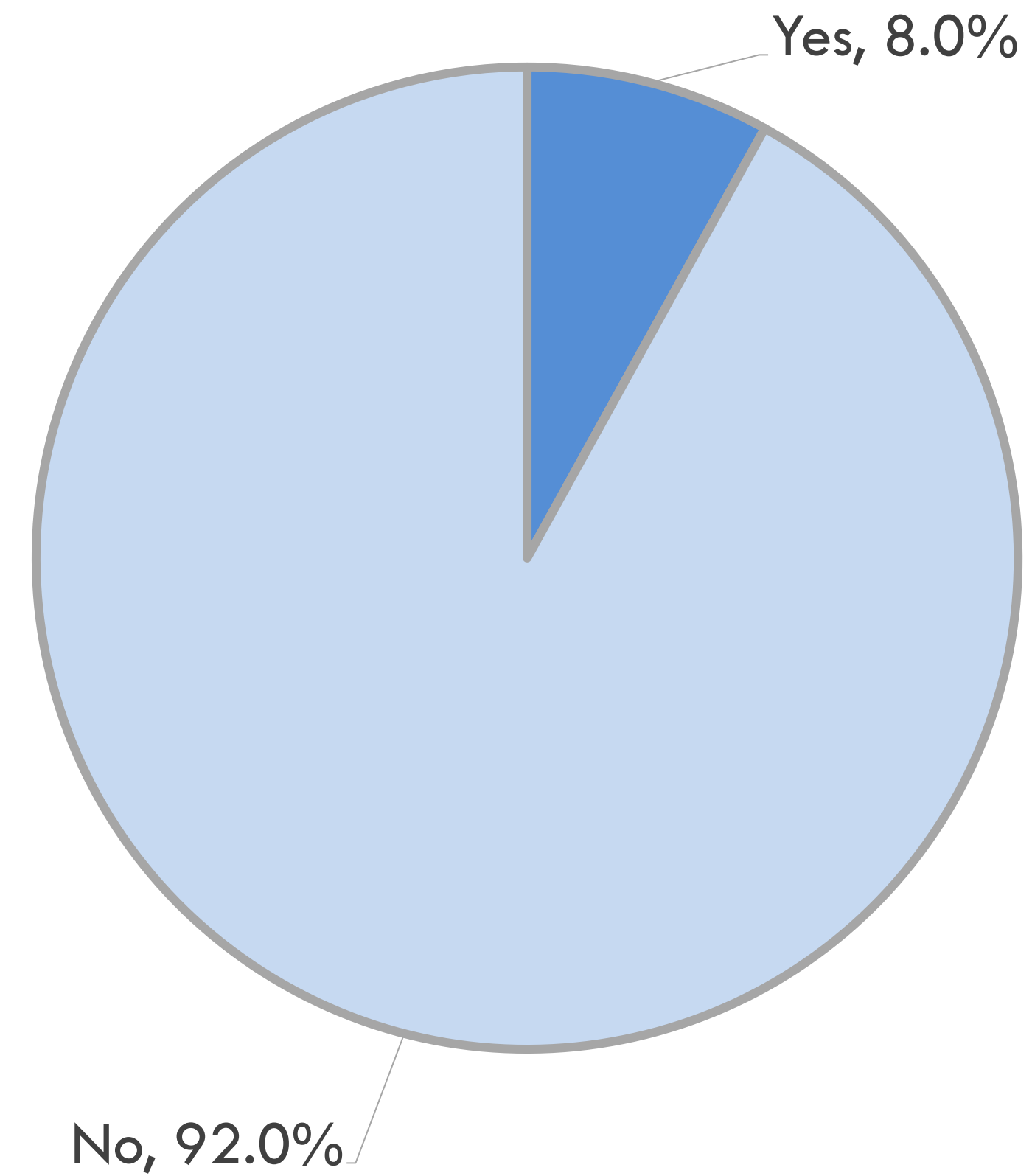
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)



BUSINESS TRIPS TAKEN

Question: Have you taken any trips for business reasons this summer (June 1 to today)?

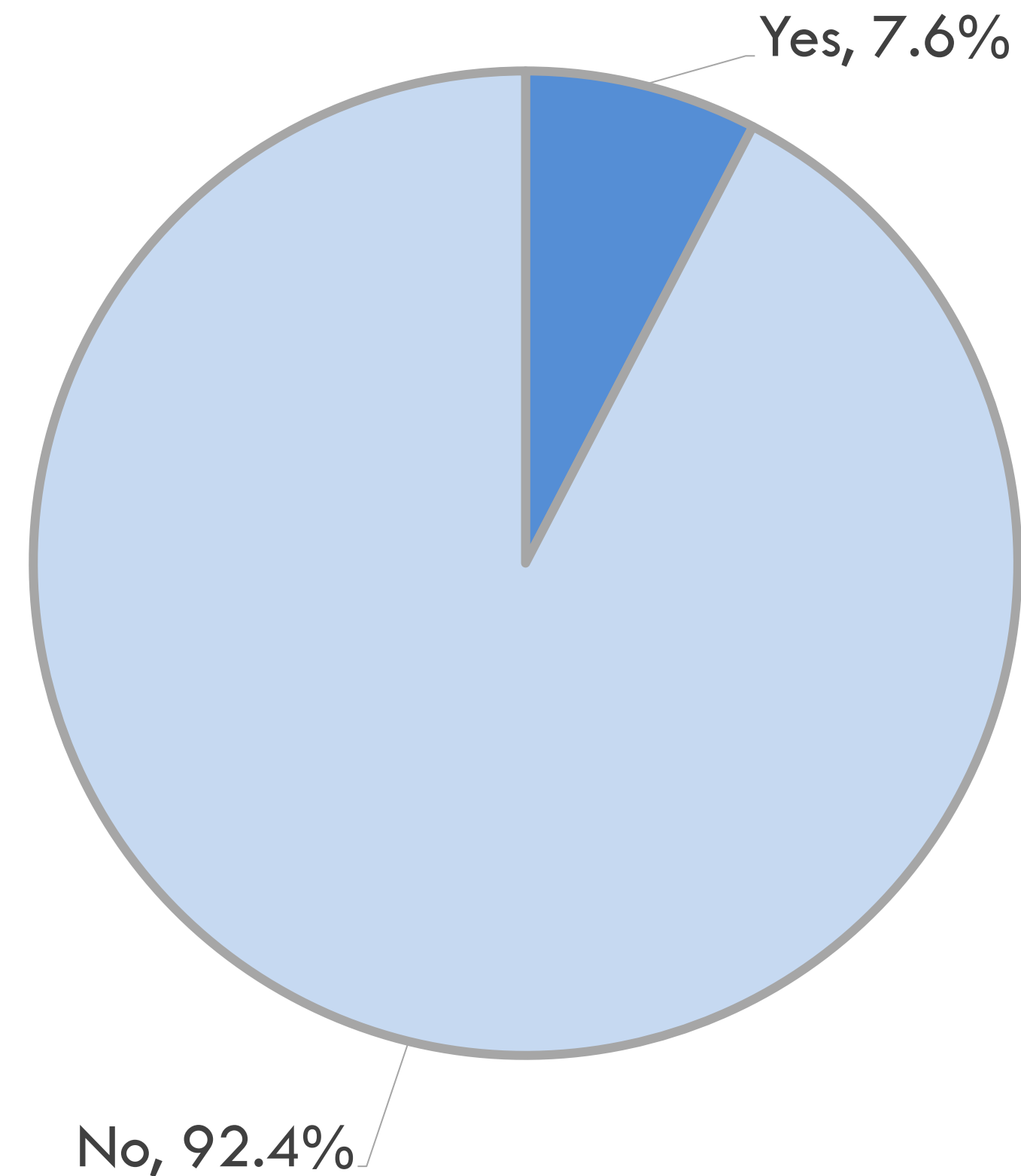
(Base: Wave 26 data. All respondents, 1,222 completed surveys. Data collected September 4-6, 2020)



GROUP MEETINGS-RELATED TRIPS TAKEN

Question: Have you taken any trips for conventions, conferences or other group meetings this summer (June 1 to today)?

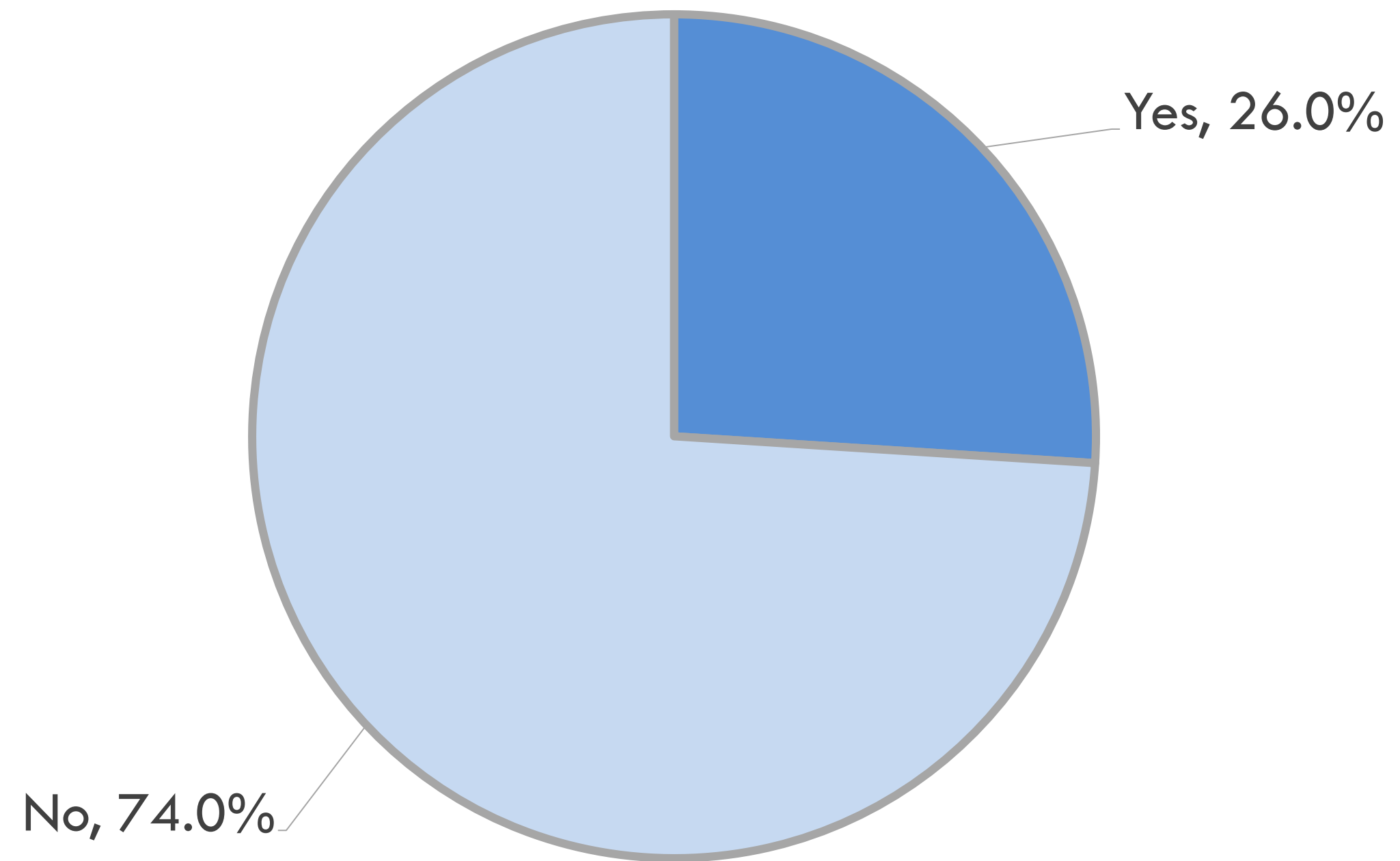
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)



STAYCATIONS TRIPS TAKEN

Question: Have you taken any STAYCATIONS this summer (June 1 to today)?

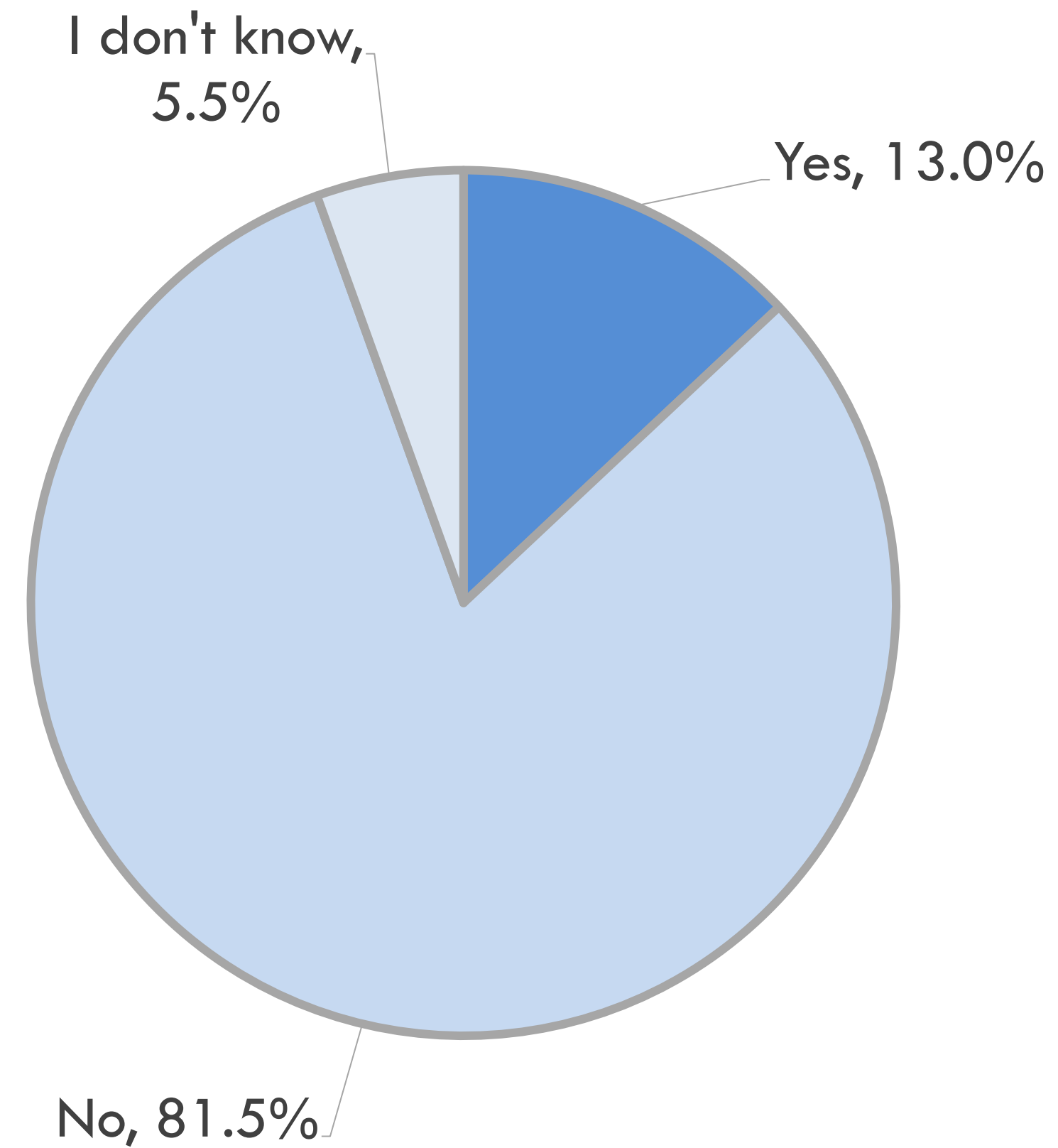
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)



LABOR DAY WEEKEND TRIPS TAKEN

Question: Are you traveling (or planning to travel) for any reason this weekend (Labor Day weekend)?

(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)

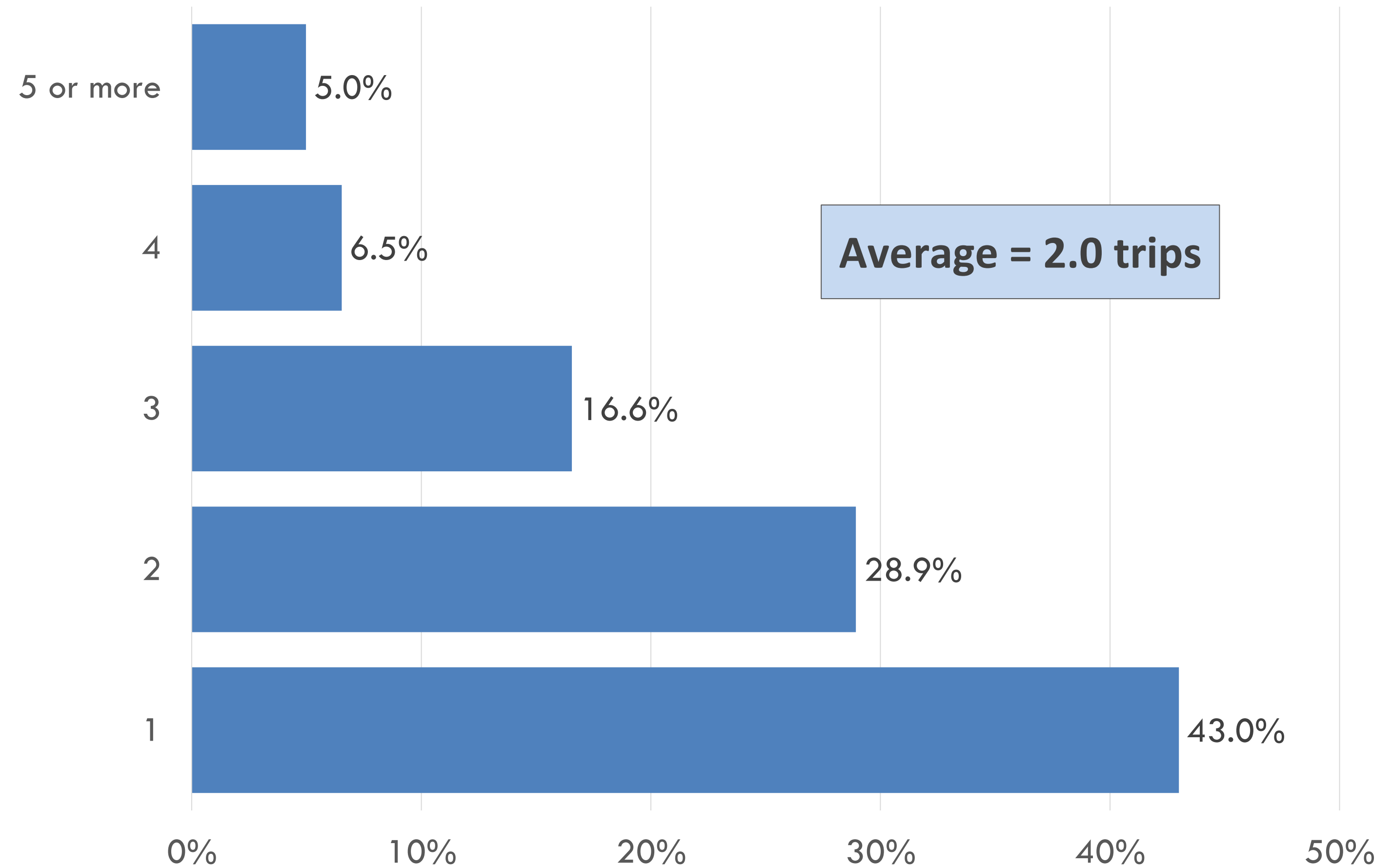


SUMMER LEISURE TRAVELERS: NUMBER OF LEISURE TRIPS TAKEN

Question: How many leisure trips did you take this summer?
(Select one)

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys.

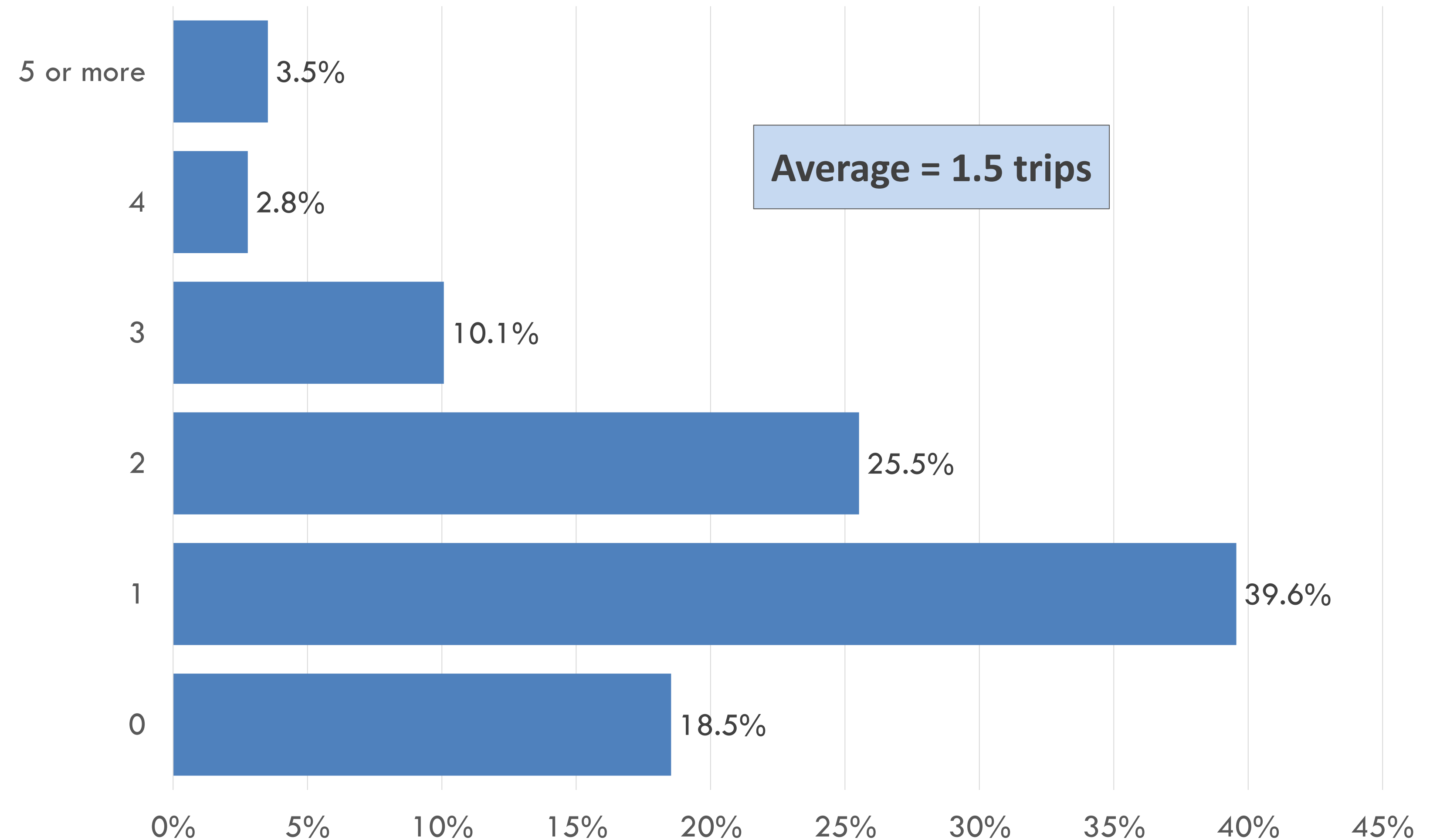
Data collected September 4-6, 2020)



SUMMER LEISURE TRAVELERS: OVERNIGHT LEISURE TRIPS TAKEN

Question: How many of these leisure trips were **OVERNIGHT TRIPS** where you stayed one or more night(s) away from home (Select one)

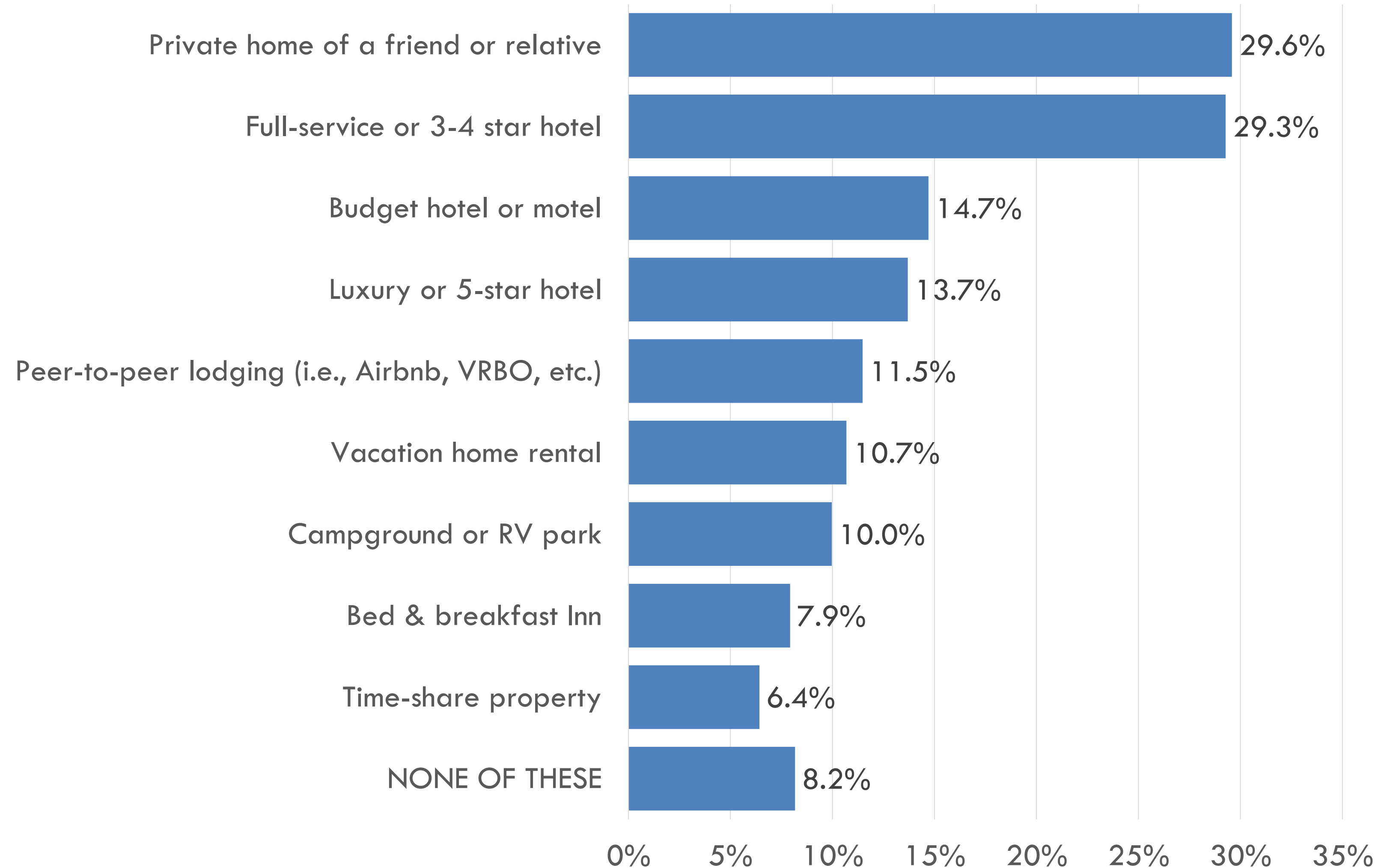
(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys. Data collected September 4-6, 2020)



OVERNIGHT LEISURE TRAVELERS: PLACE OF STAY

Question: In which of the following did you stay overnight at during any of your summer leisure trip(s)? (Select all that apply)

(Base: Wave 26 data. Respondents taking an overnight summer leisure trip, 334 completed surveys. Data collected September 4-6, 2020)

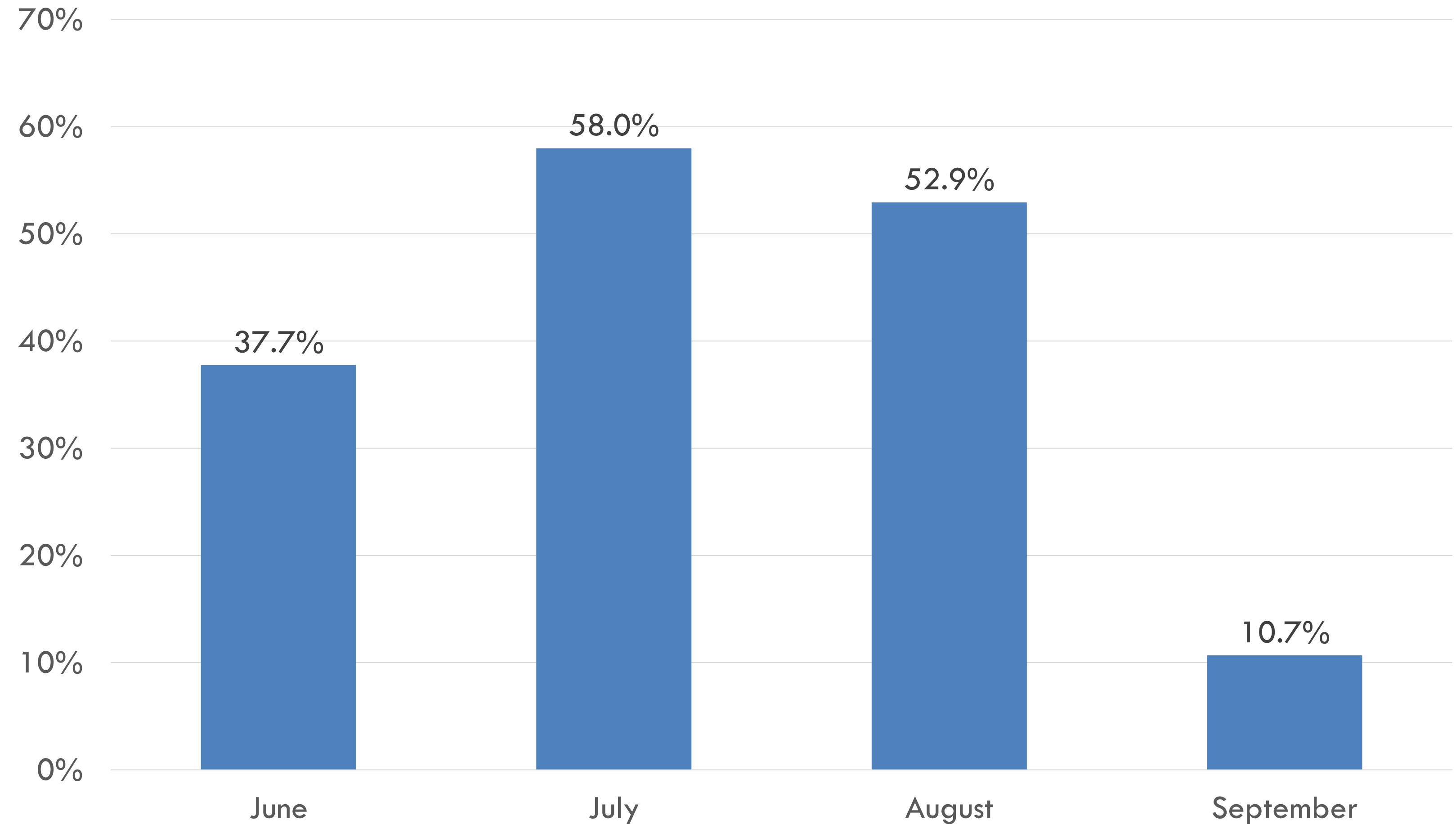


SUMMER LEISURE TRAVELERS: LEISURE TRIPS TAKEN (BY MONTH)

Question: In which summer month(s) did you take a leisure trip/trips? (Select all that apply)

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys.

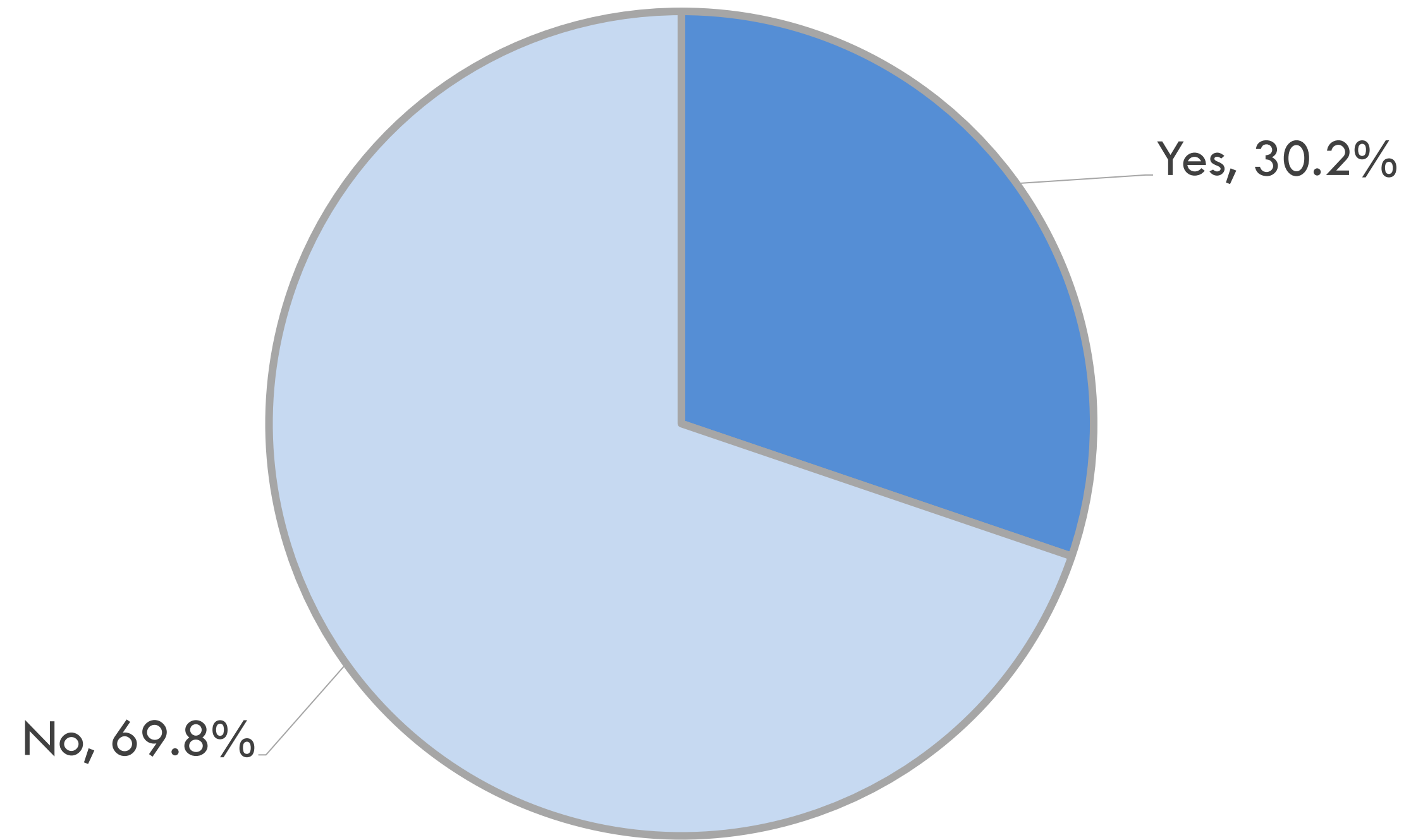
Data collected September 4-6, 2020)



TRAVEL ON A COMMERCIAL AIRLINE

Question: On any of your summer trip(s) did you travel on a commercial airline?

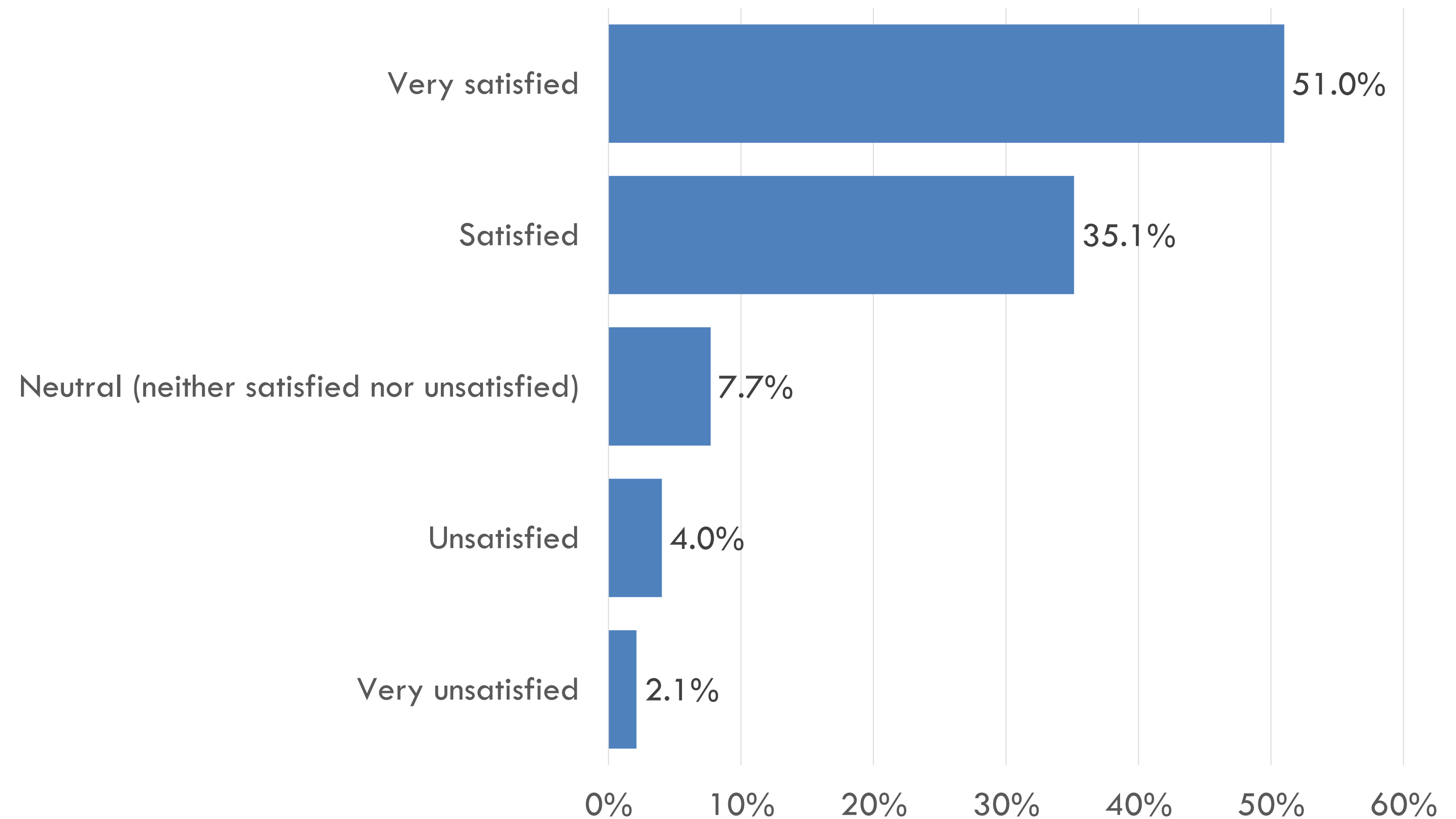
(Base: Wave 26 data. Respondents taking a summer trip, 485 completed surveys. Data collected September 4-6, 2020)



SATISFACTION WITH AIRLINE SAFETY PROTOCOLS

Question: Please think about your most recent flight on a commercial airline. In general, how satisfied were you with the Coronavirus safety protocols put in place by your airline(s)? (Select one)

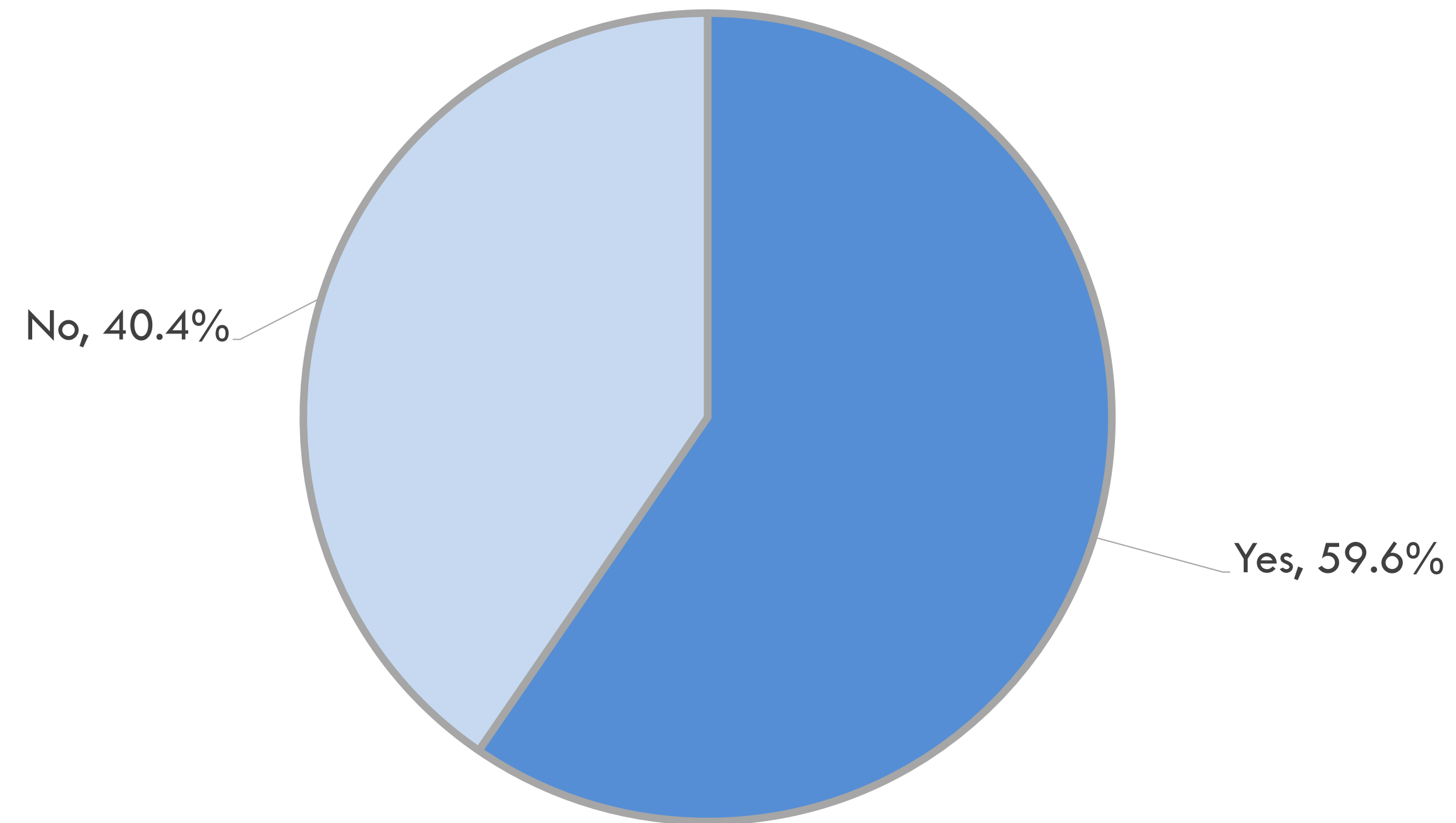
(Base: Wave 26 data. Respondents traveling on a commercial airline, 121 completed surveys. Data collected September 4-6, 2020)



TRAVELERS SEATED IN THE NEXT SEAT

Question: On your most recent commercial airline flight was anyone from outside your immediate travel party seated next to you? (Select one)

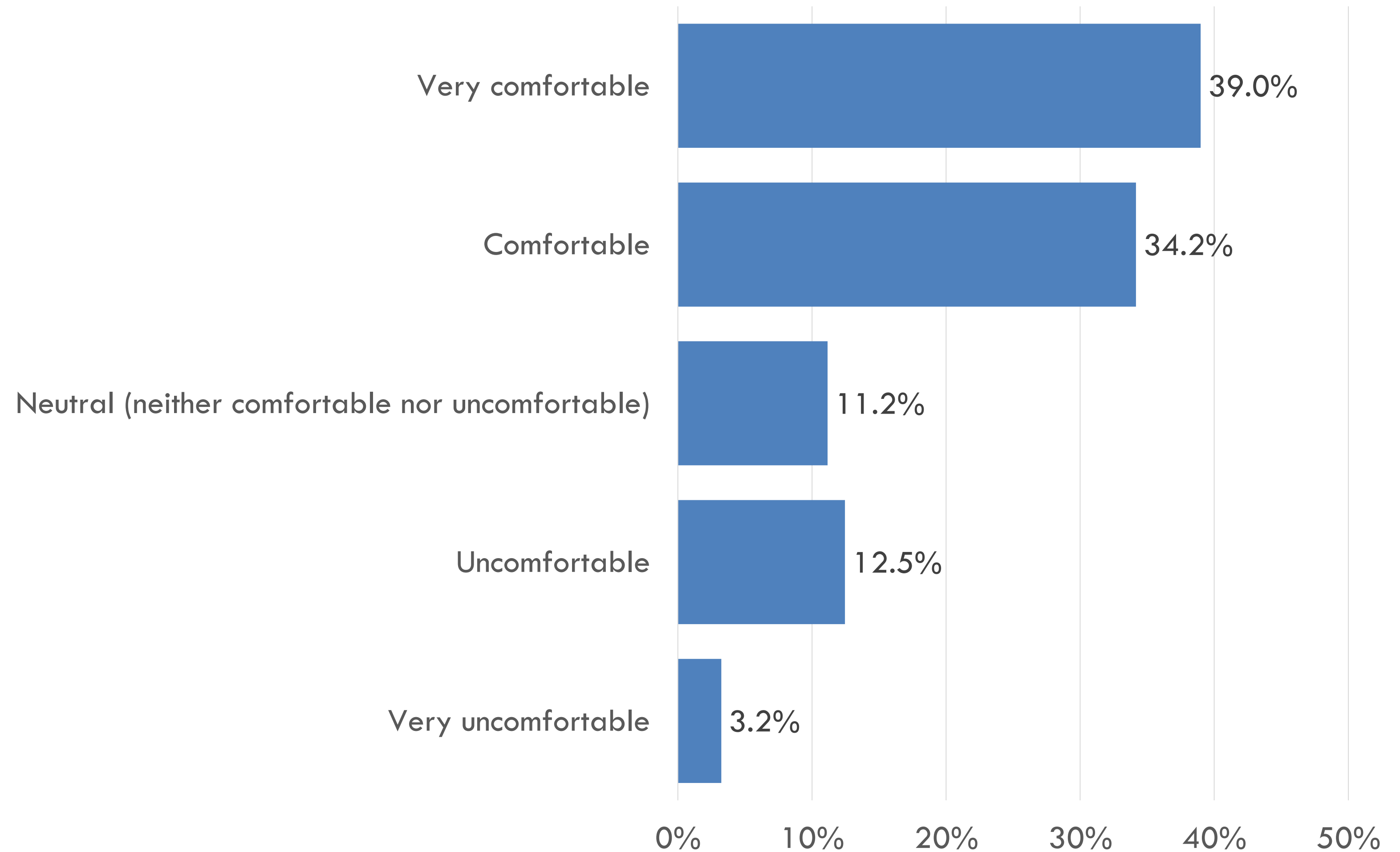
(Base: Wave 26 data. Respondents traveling on a commercial airline, 120 completed surveys. Data collected September 4-6, 2020)



COMFORT LEVEL WITH NUMBER OF PASSENGERS

Question: How comfortable were you with the number of passengers onboard your most recent flight? (Select one)

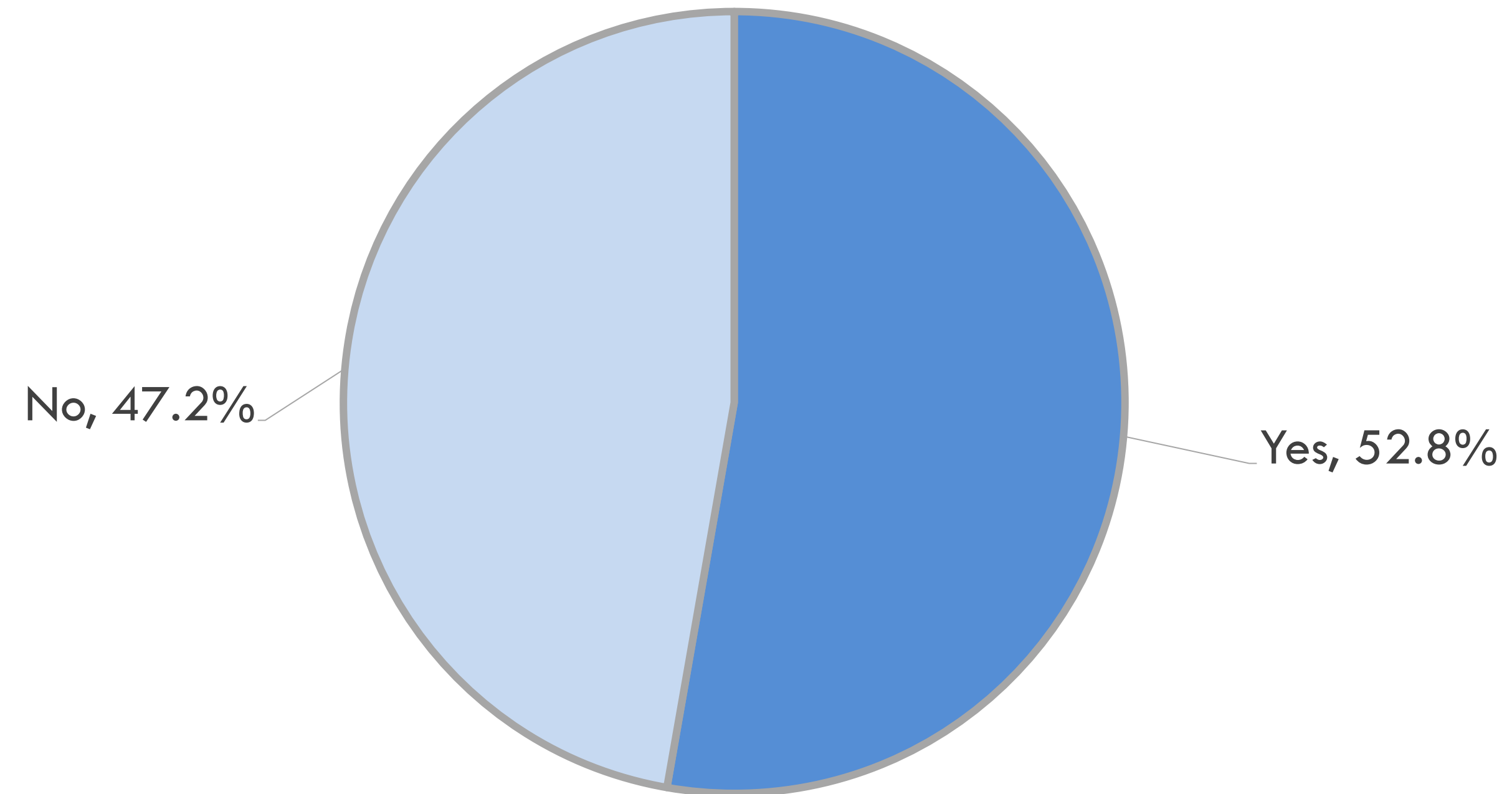
(Base: Wave 26 data. Respondents traveling on a commercial airline, 120 completed surveys. Data collected September 4-6, 2020)



COVID-19 SAFETY CONCERNS ONBOARD AIRPLANES

Question: Thinking exclusively about Coronavirus concerns, at any point during your most recent commercial airline trip did you feel unsafe **ONBOARD AN AIRPLANE?**

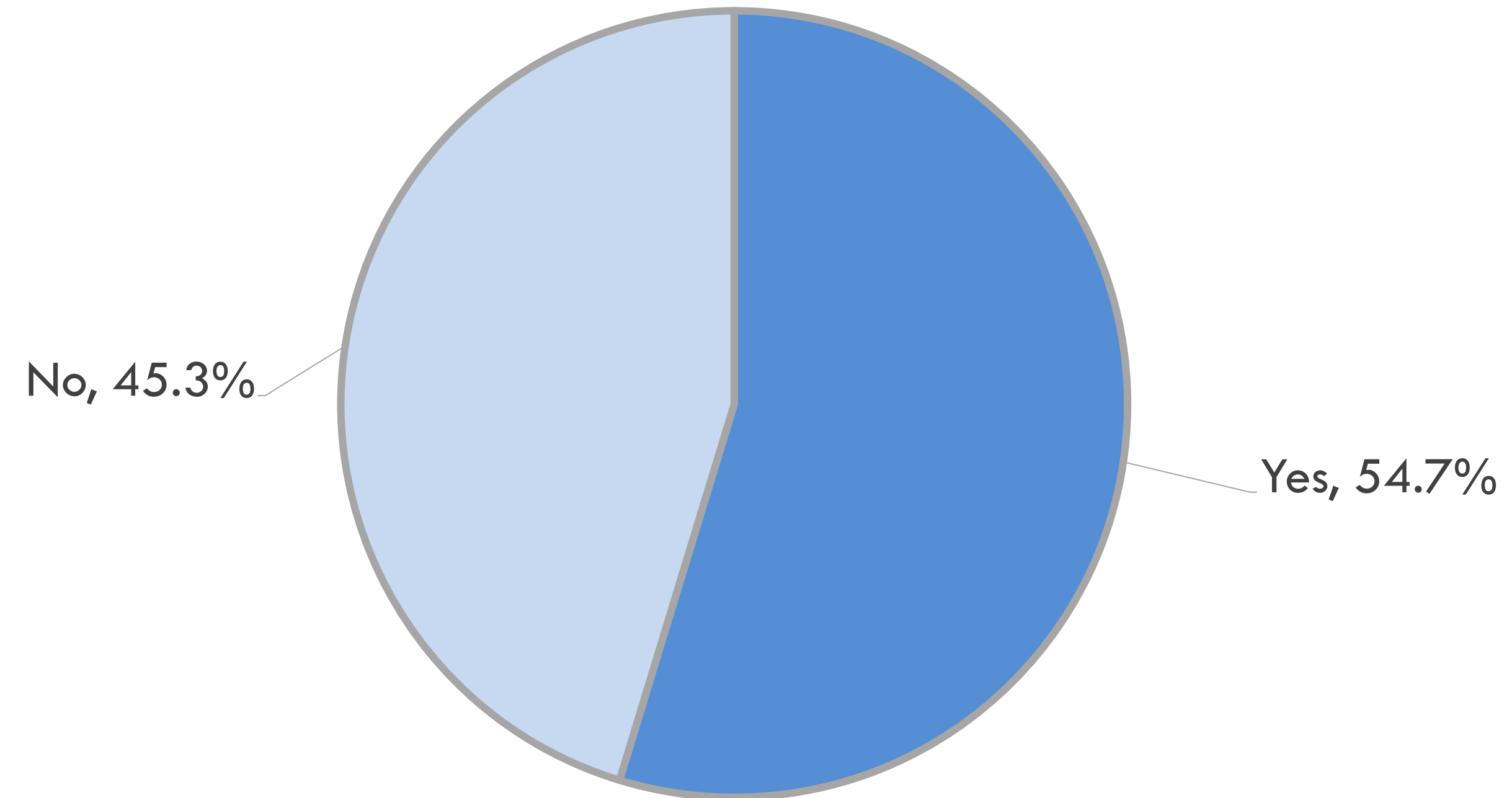
(Base: Wave 26 data. Respondents traveling on a commercial airline, 117 completed surveys. Data collected September 4-6, 2020)



COVID-19 SAFETY CONCERNS AT AIRPORTS

Question: Thinking exclusively about Coronavirus concerns, at any point during your most recent commercial airline trip did you feel unsafe WHILE AT ANY AIRPORT?

(Base: Wave 26 data. Respondents traveling on a commercial airline, 119 completed surveys. Data collected September 4-6, 2020)

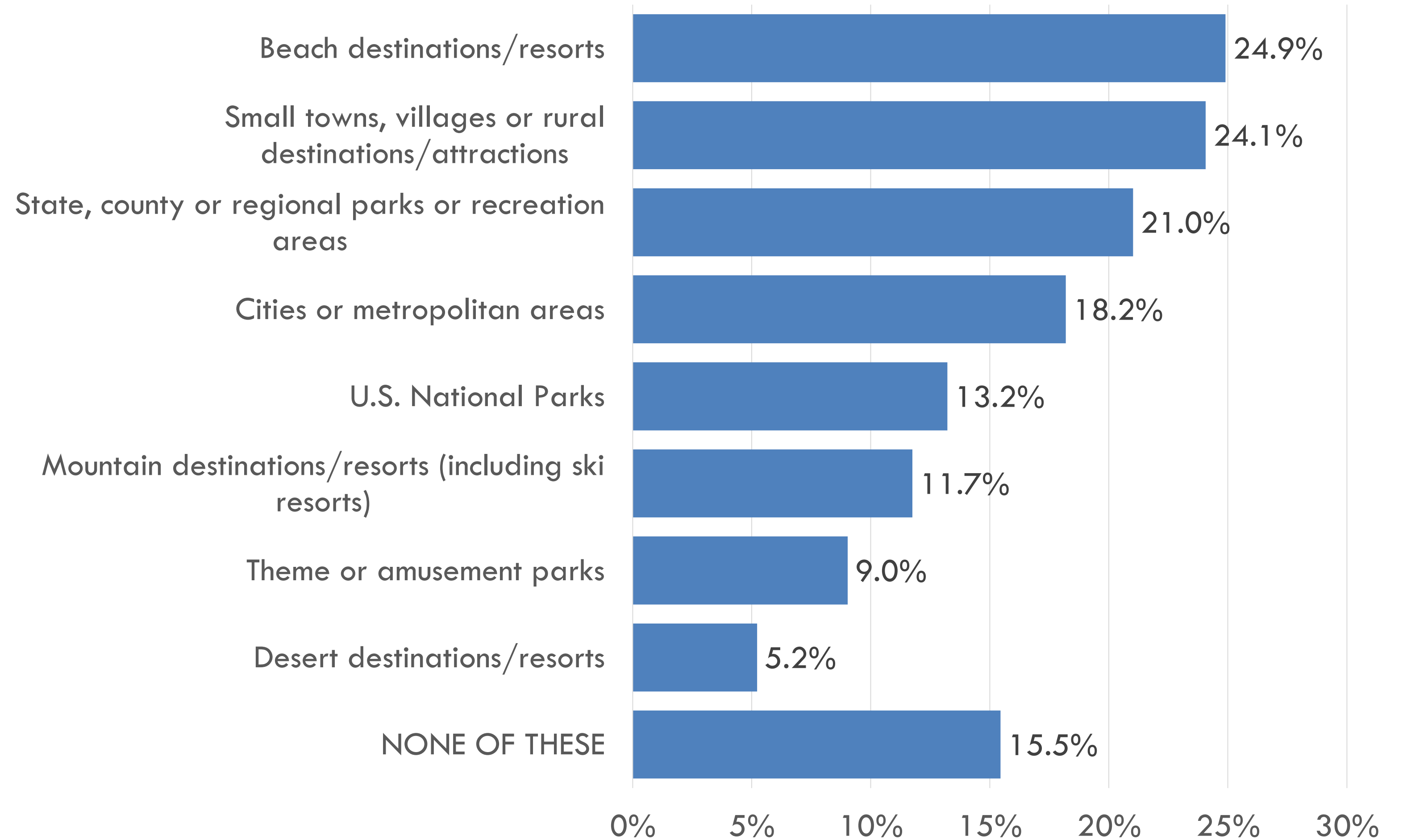


SUMMER LEISURE TRAVELERS: DESTINATIONS TYPES VISITED

Question: Which types of destinations did you visit on your **MOST RECENT** leisure trip? (Select all that apply)

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys.

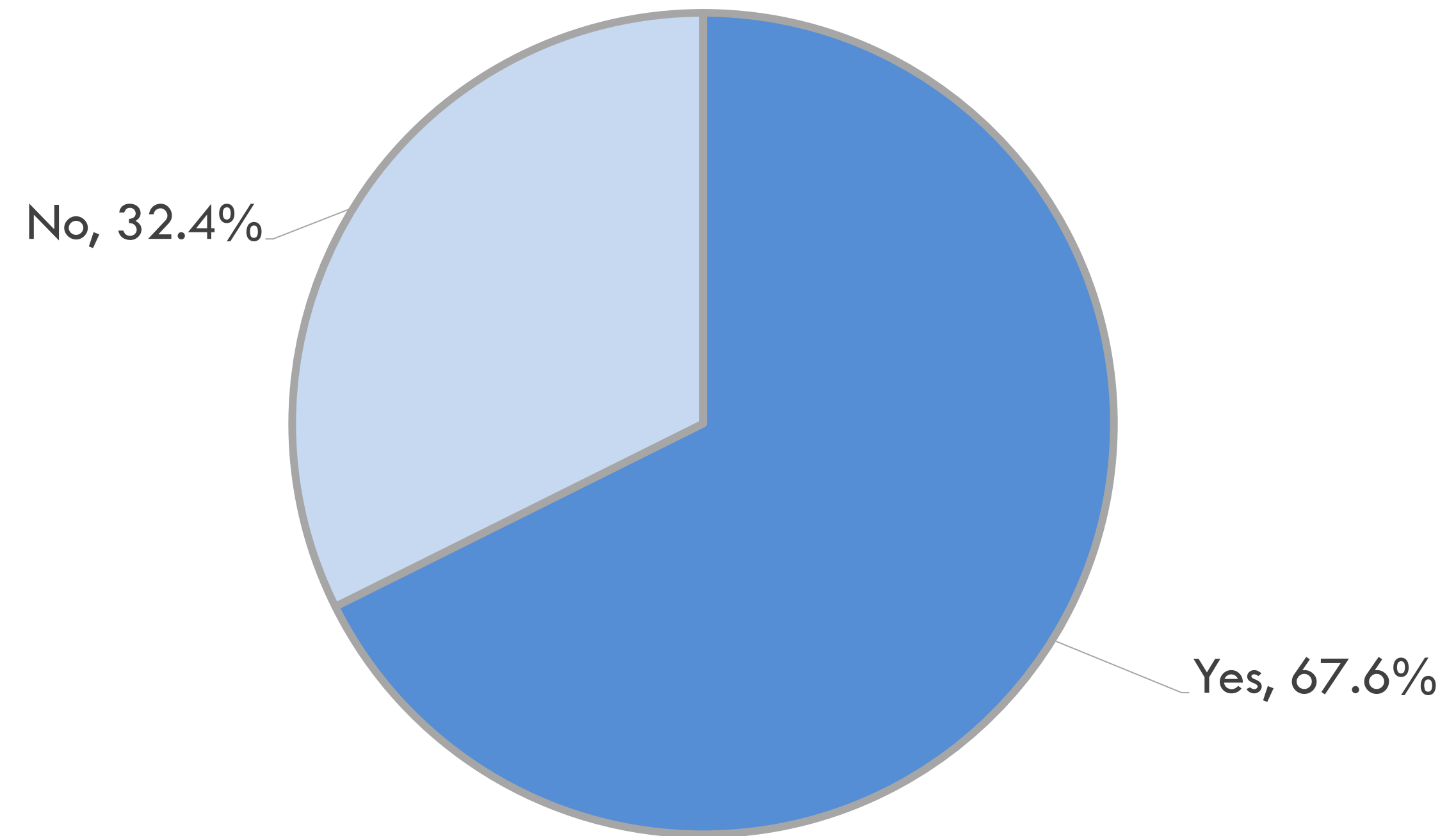
Data collected September 4-6, 2020)



SUMMER LEISURE TRAVELERS: RESEARCHING DESTINATION SAFETY RULES

Question: Prior to your most recent leisure trip, did you research the Coronavirus-related rules and regulations (masks, restaurant protocols, quarantine laws, etc.) for the destinations you visited?

(Base: Wave 26 data. Respondents taking a summer leisure trip, 413 completed surveys. Data collected September 4-6, 2020)

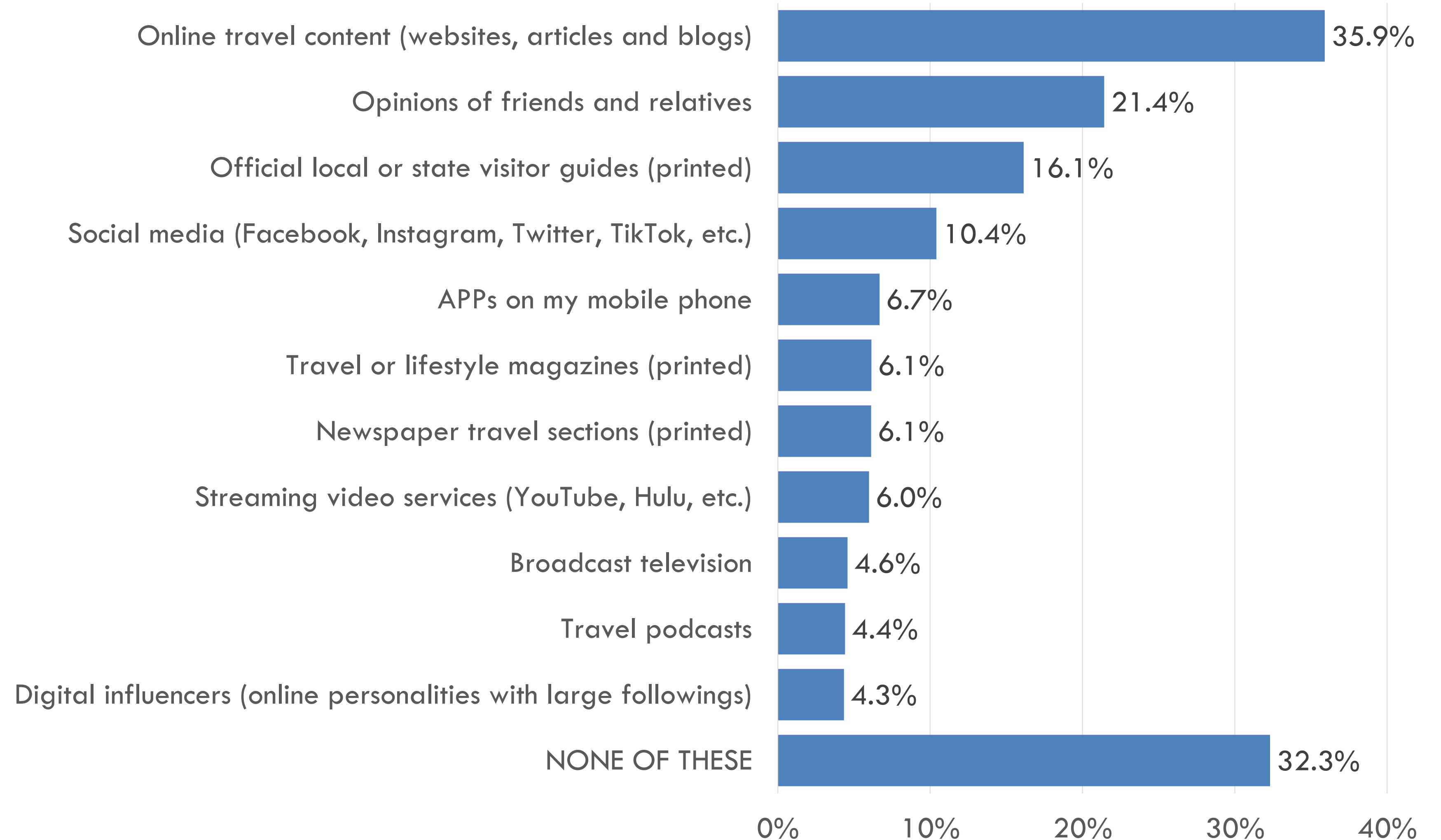


SUMMER LEISURE TRAVELERS: TRAVEL PLANNING RESOURCES

Question: Which of the following resources did you use to help plan your most recent leisure trip? (Select all that apply)

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys.

Data collected September 4-6, 2020)

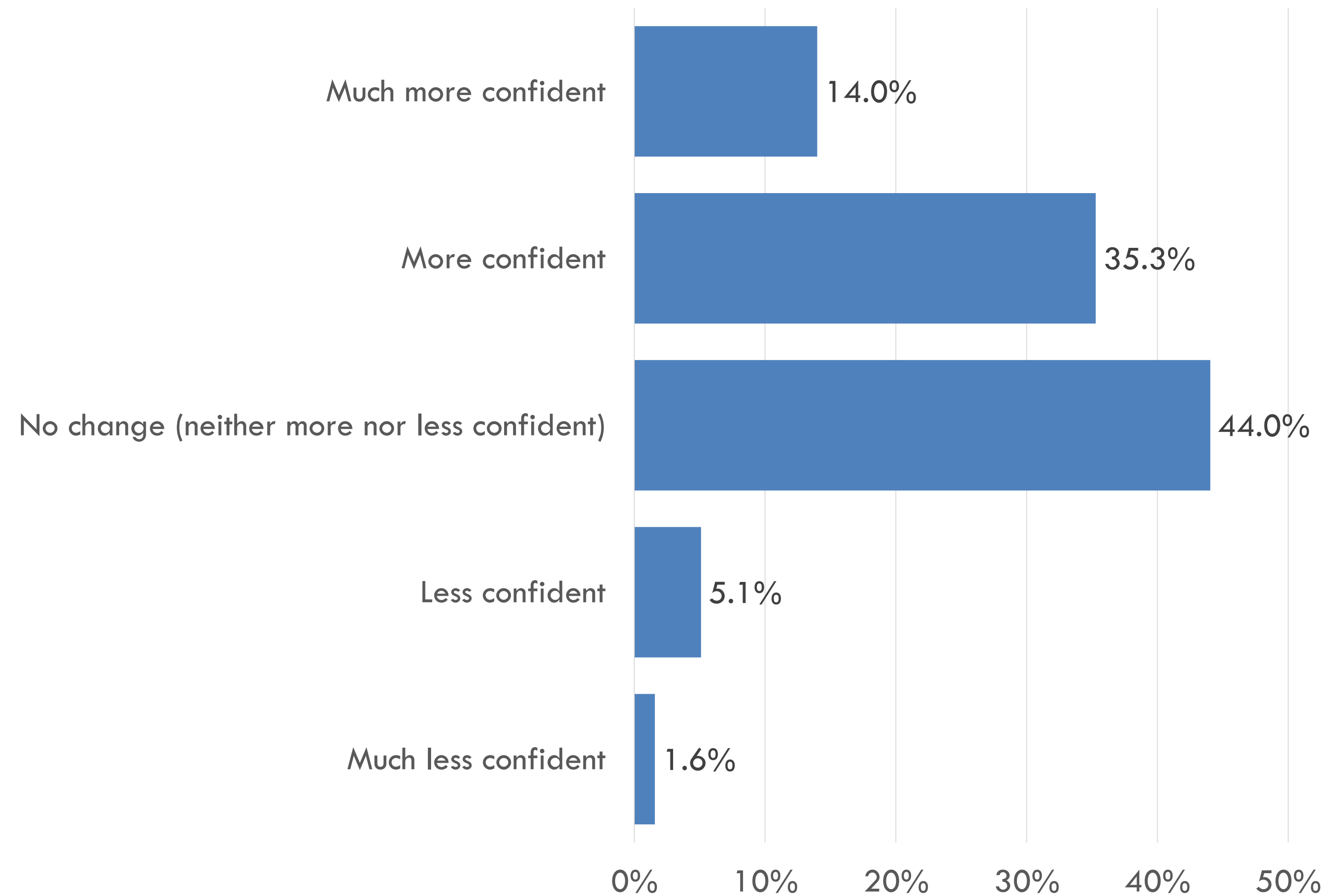


SUMMER LEISURE TRAVELERS: DOES TRAVEL INSPIRE CONFIDENCE?

Question: Did taking this trip make you more or less confident that you can travel safely in the time of the Coronavirus? (Select one)

My experiences on my most recent leisure trip have made me _____ I can travel safely.

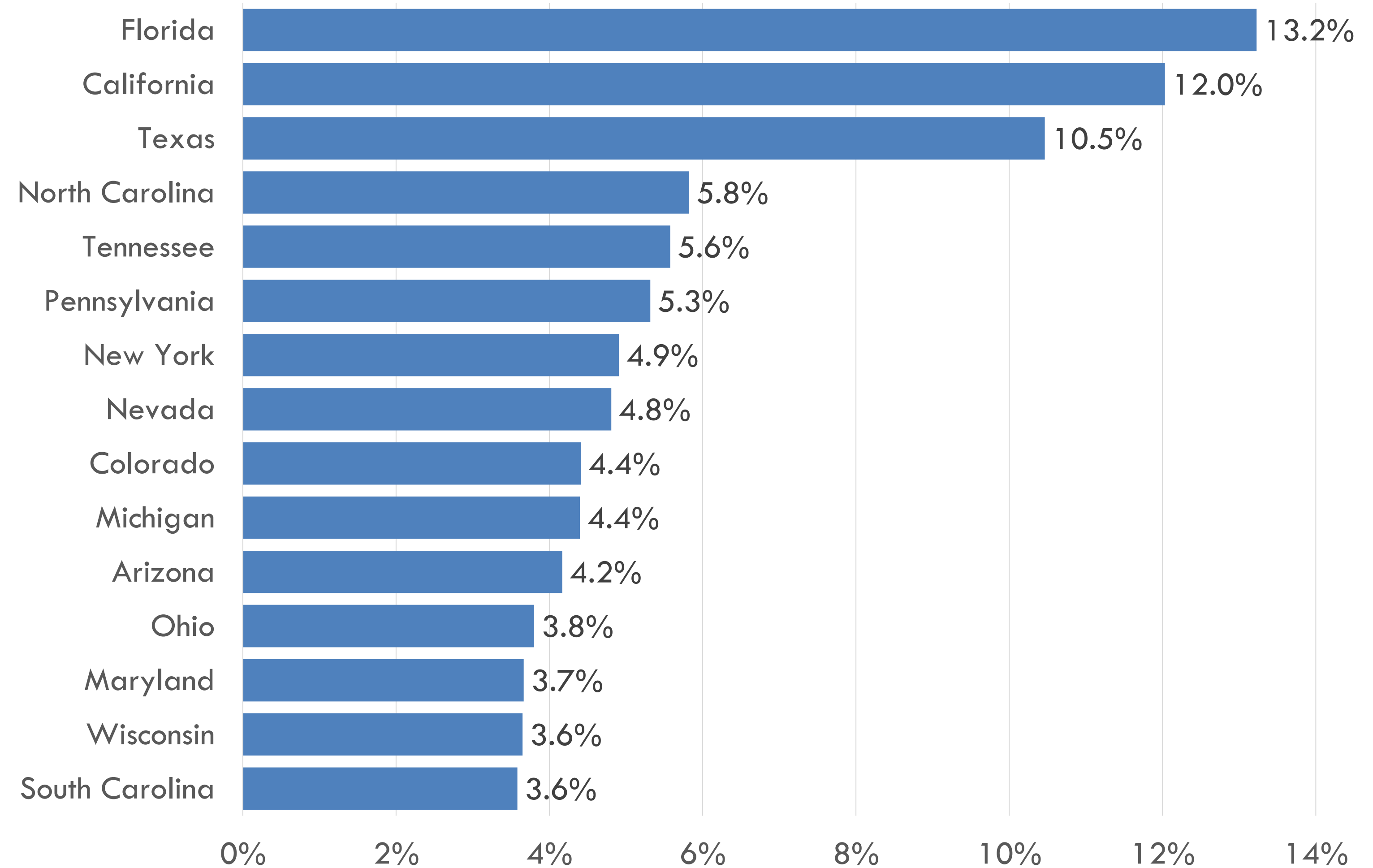
(Base: Wave 26 data. Respondents taking a summer leisure trip, 416 completed surveys. Data collected September 4-6, 2020)



SUMMER LEISURE TRAVELERS: STATES VISITED

Question: Which state(s) did you visit (or travel within) on any leisure trip(s) this summer?

(Base: Wave 26 data. Respondents taking a summer leisure trip, 419 completed surveys. Data collected September 4-6, 2020)



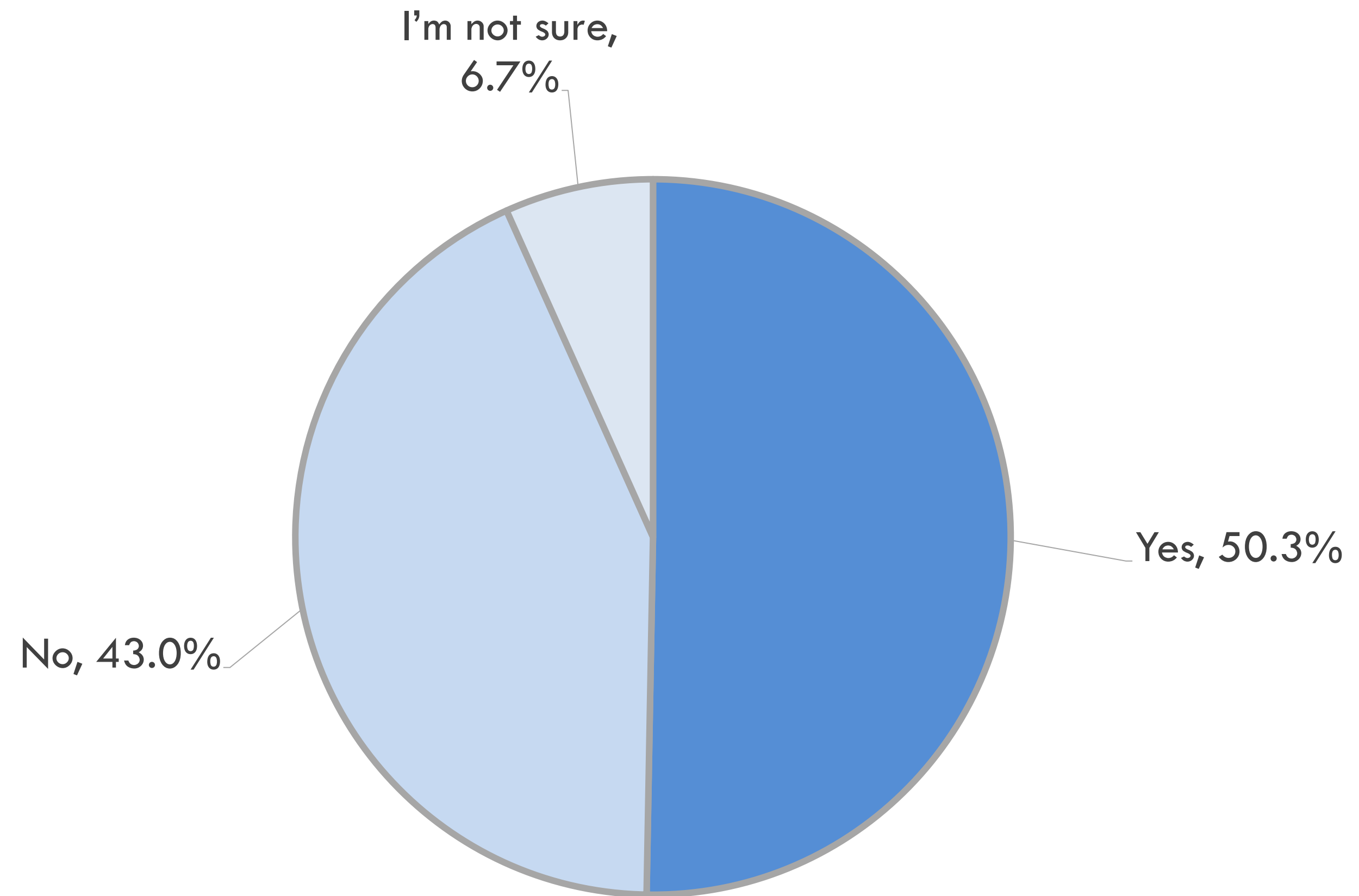
A man in a grey suit and tie is walking, talking on a white smartphone. He has a brown leather bag slung over his shoulder and is pulling a suitcase. The background is a blurred airport or travel setting.

BUSINESS TRAVEL

COMPANIES WITH TRAVELING STAFF (PRE-COVID)

Question: Prior to the COVID-19 pandemic, did people at the company/organization you work for travel for business purposes? (Select one)

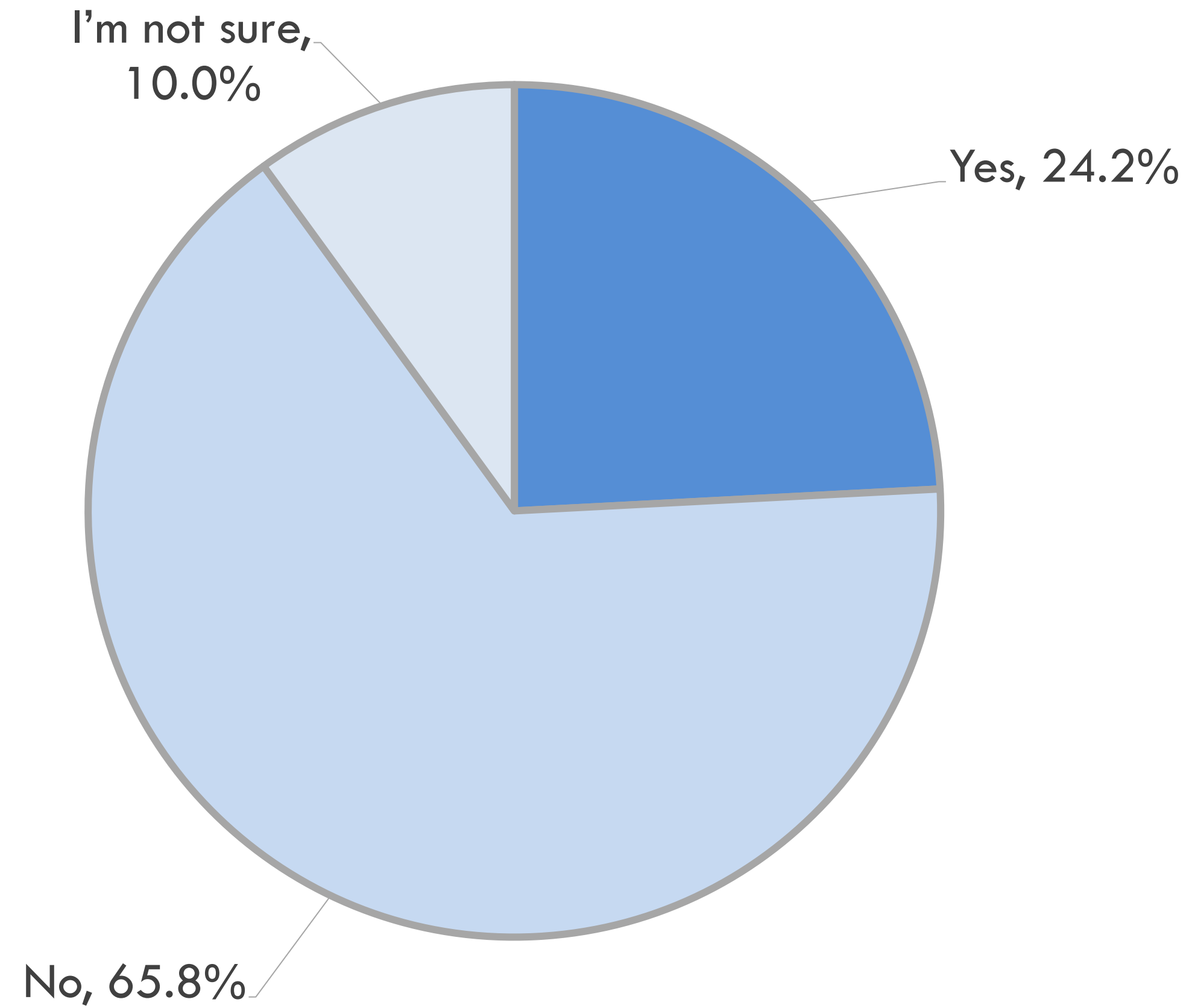
(Base: Wave 26 data. Employed respondents, 871 completed surveys. Data collected September 4-6, 2020)



HAS BUSINESS TRAVEL RESUMED

Question: To your knowledge, have people at the company/organization you work for started traveling for business purposes again?

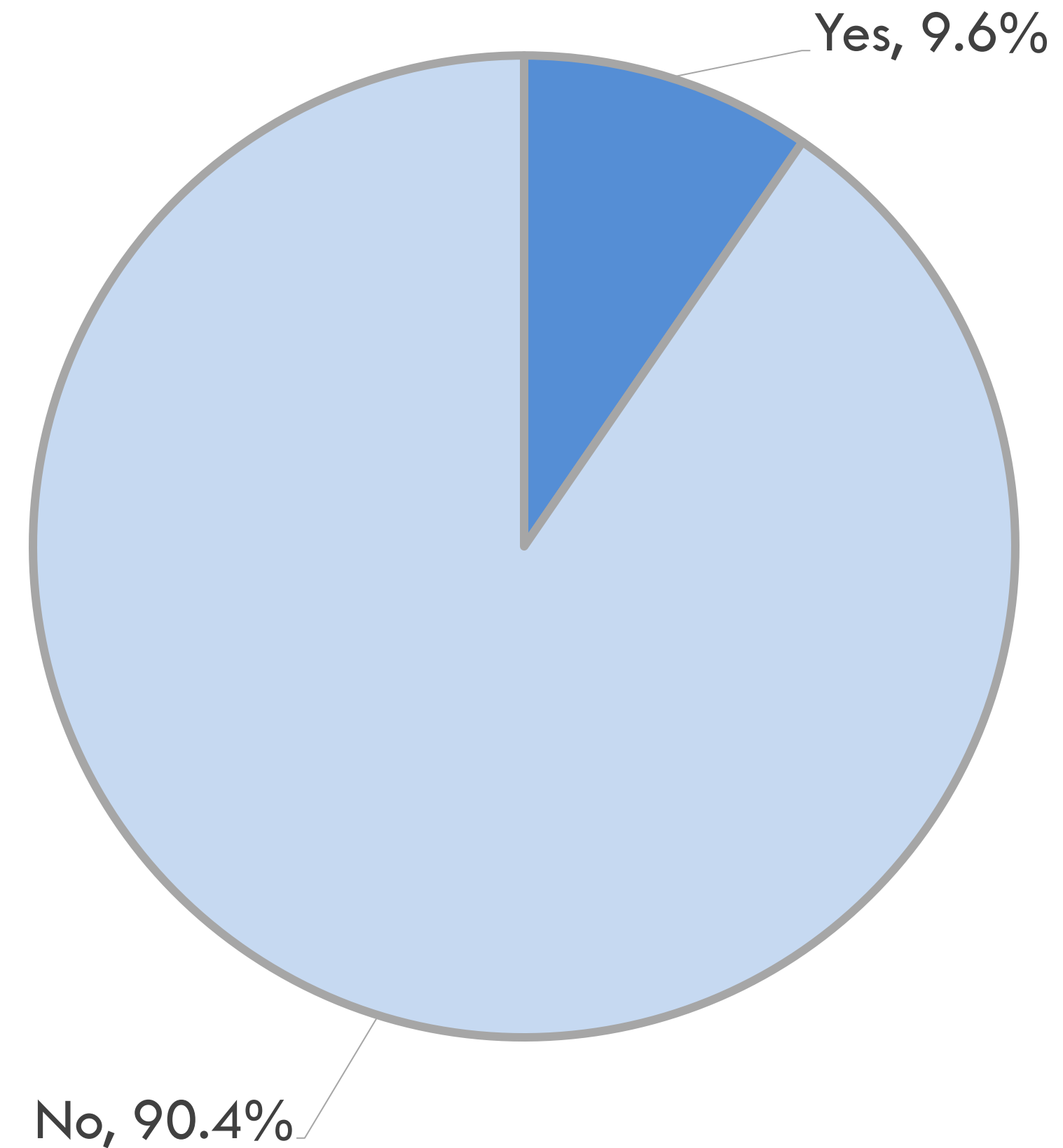
(Base: Wave 26 data. Respondents working for companies where employees travel for business, 428 completed surveys. Data collected September 4-6, 2020)



COMPANY ANNOUNCEMENTS ON RESUMPTION OF TRAVEL

Question: Has the company/organization you work for given any indication on when company business travel will begin again?

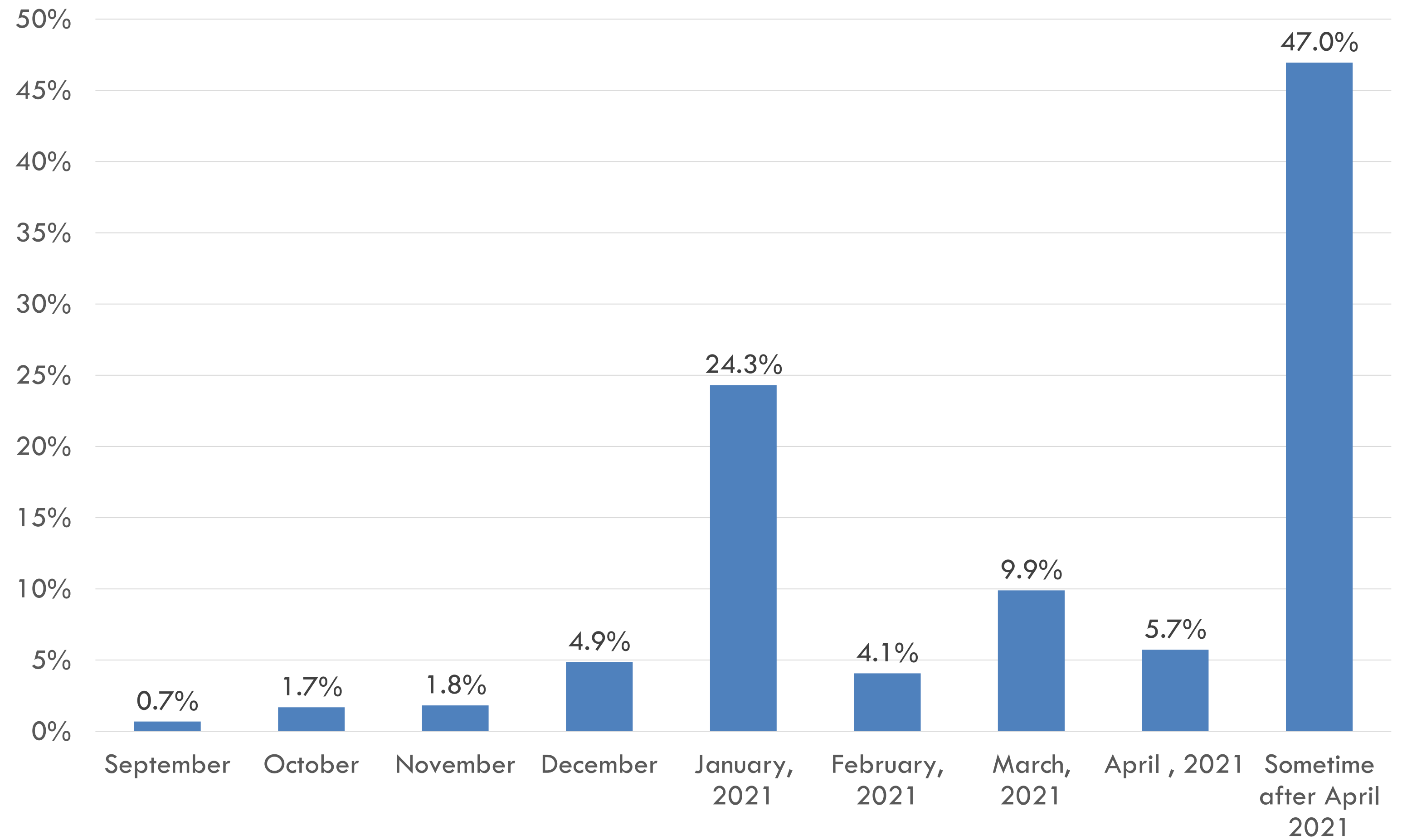
(Base: Wave 26 data. Respondents employed by companies with business traveling staff that haven't announced resumption of business travel, 331 completed surveys. Data collected September 4-6, 2020)



EXPECTED DATE OF BUSINESS TRAVEL RESUMPTION

Question: Which month do you anticipate the company/organization you work for will begin traveling for business again?

(Base: Wave 26 data. Respondents employed by companies with business traveling staff that haven't announced resumption of business travel, 330 completed surveys. Data collected September 4-6, 2020)

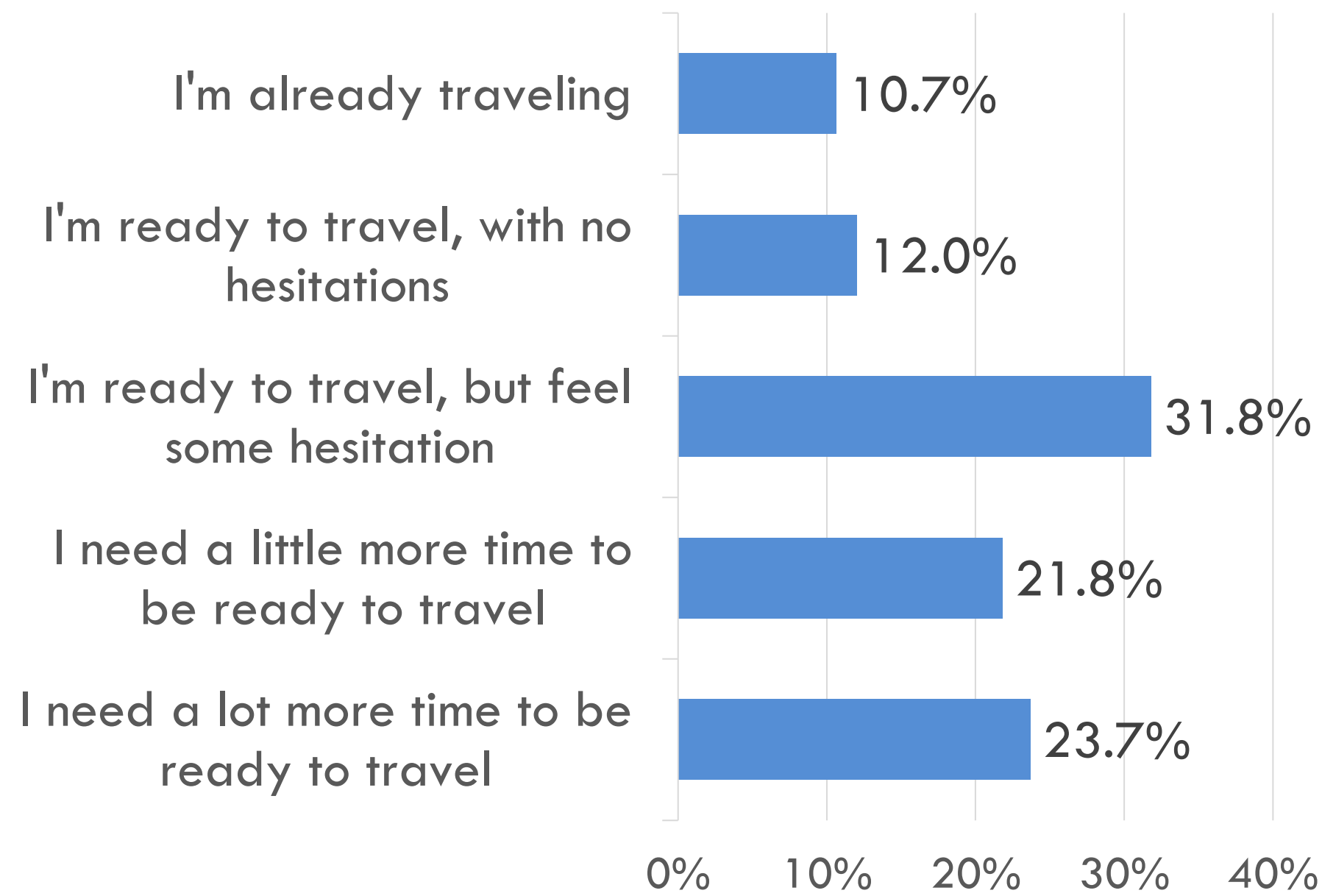




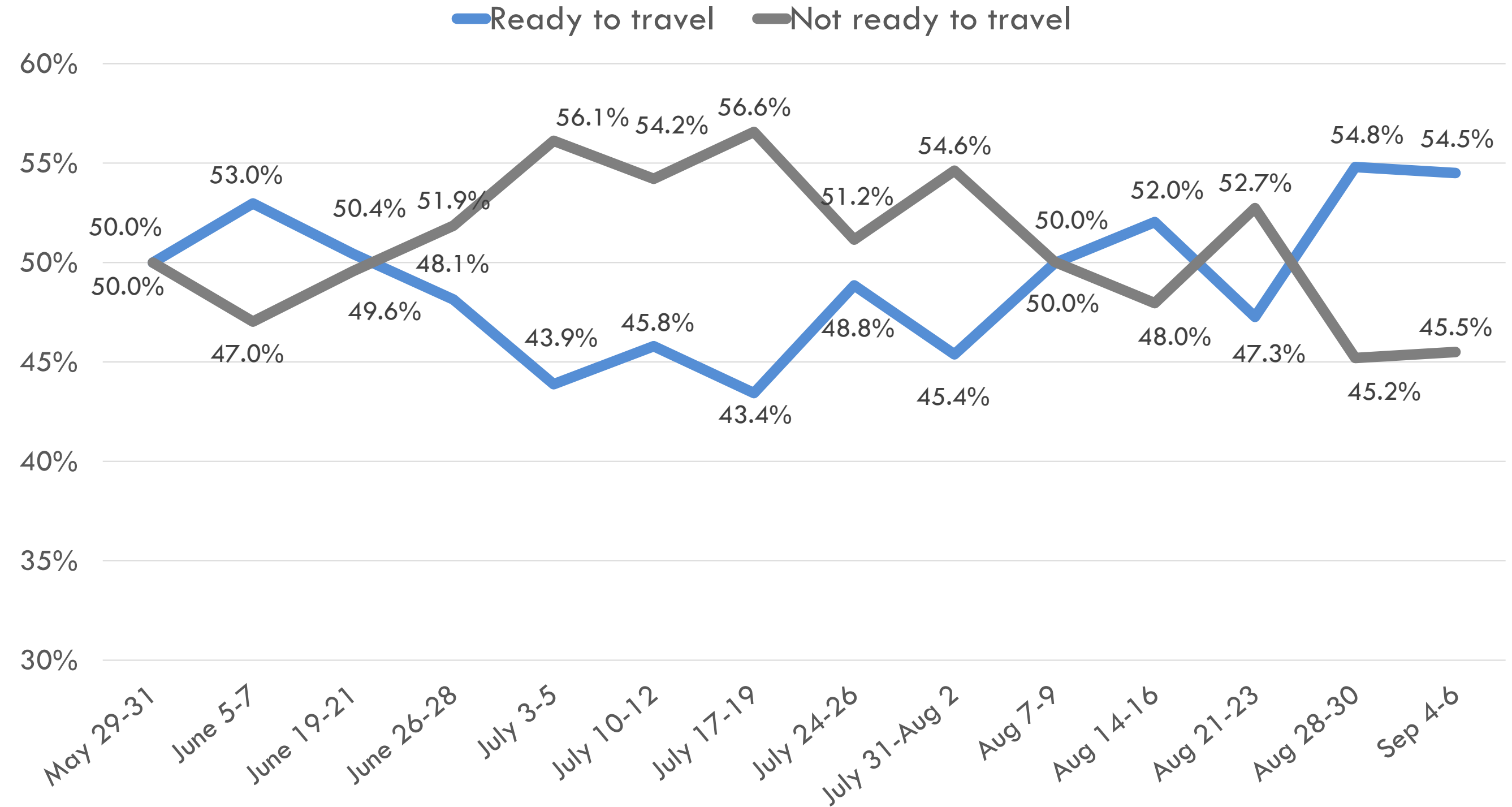
**OPINIONS ON TRAVEL &
THE CORONAVIRUS**

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

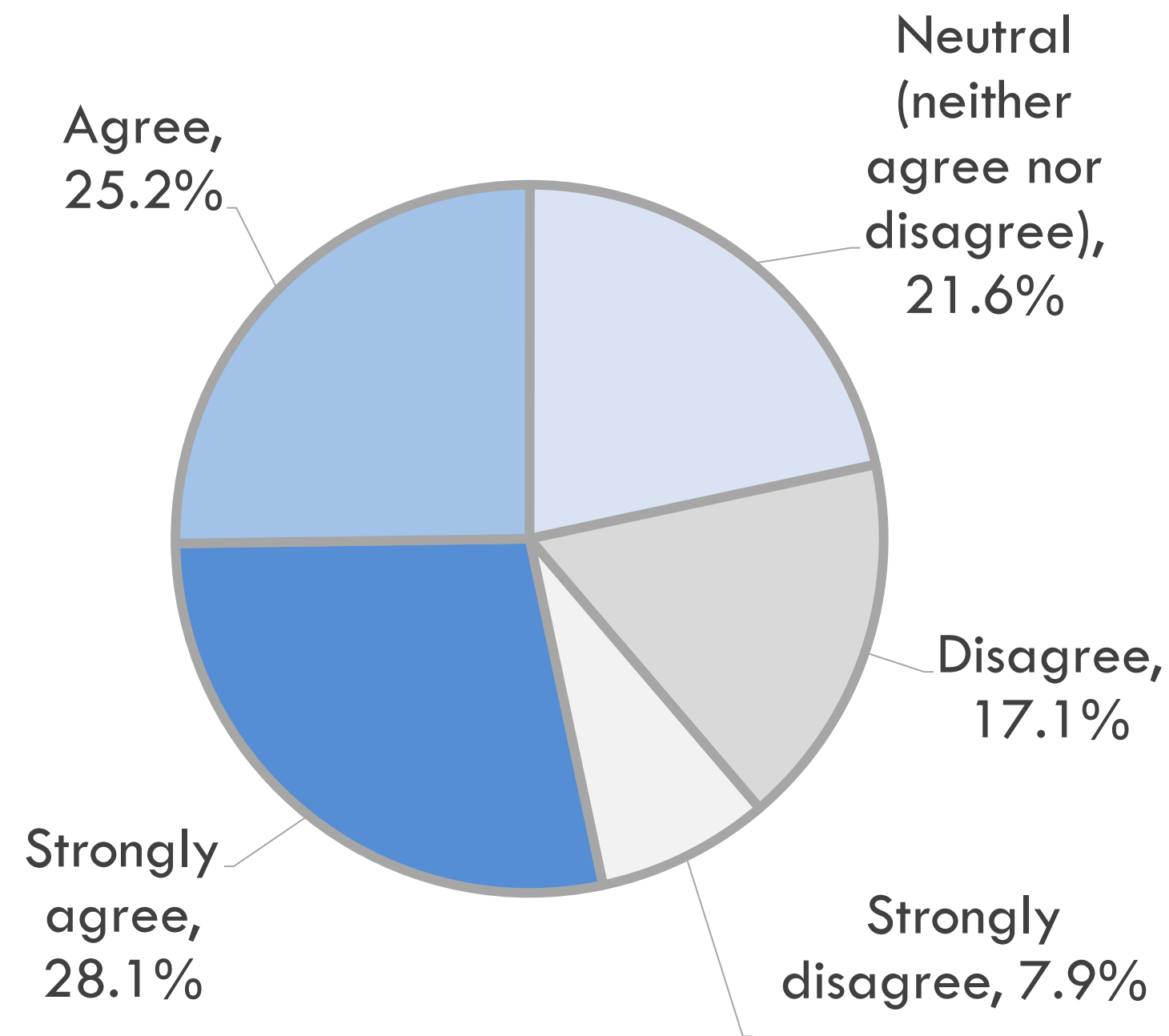


(Base: Waves 12-13 and 15-26. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

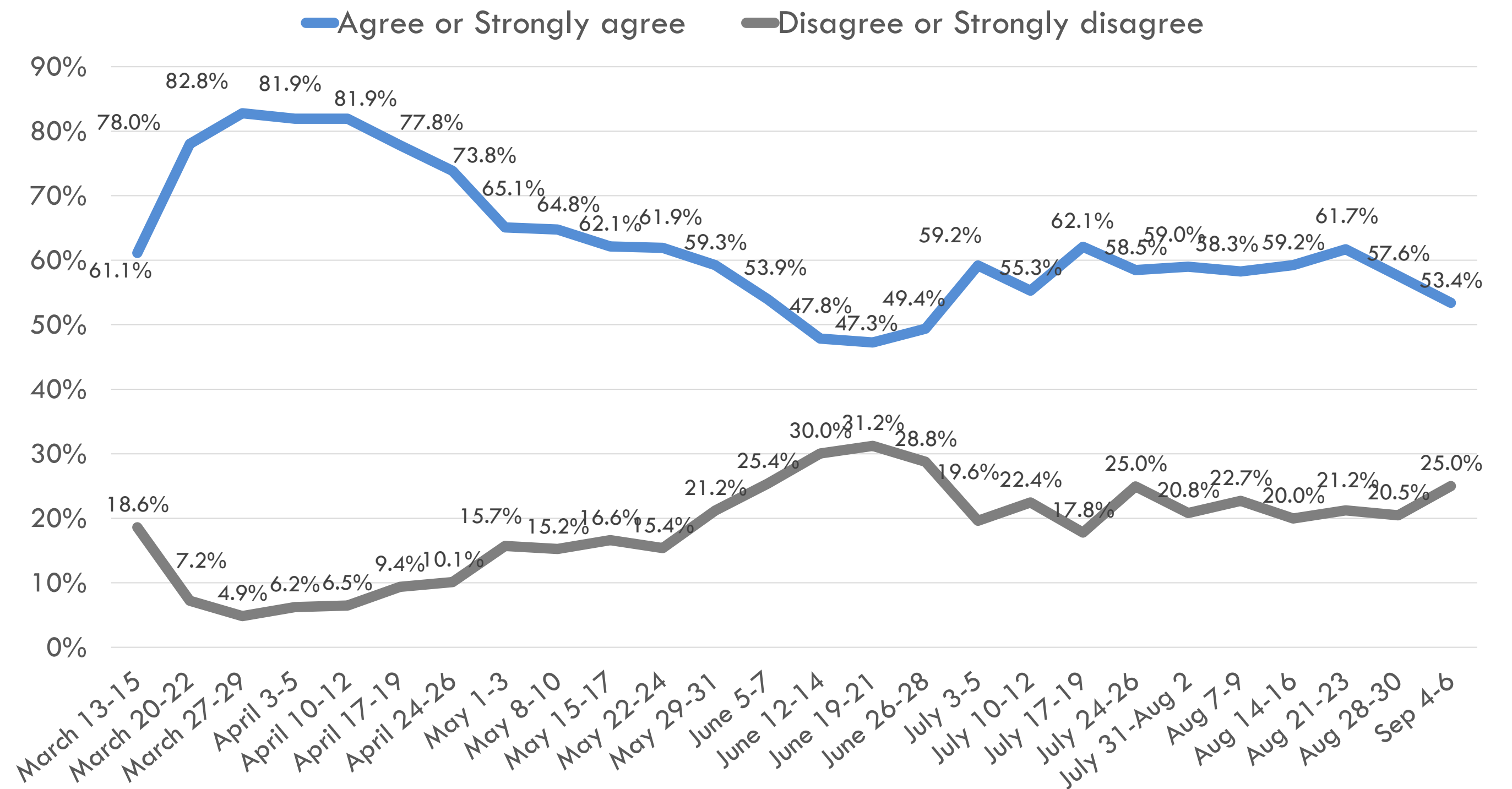
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

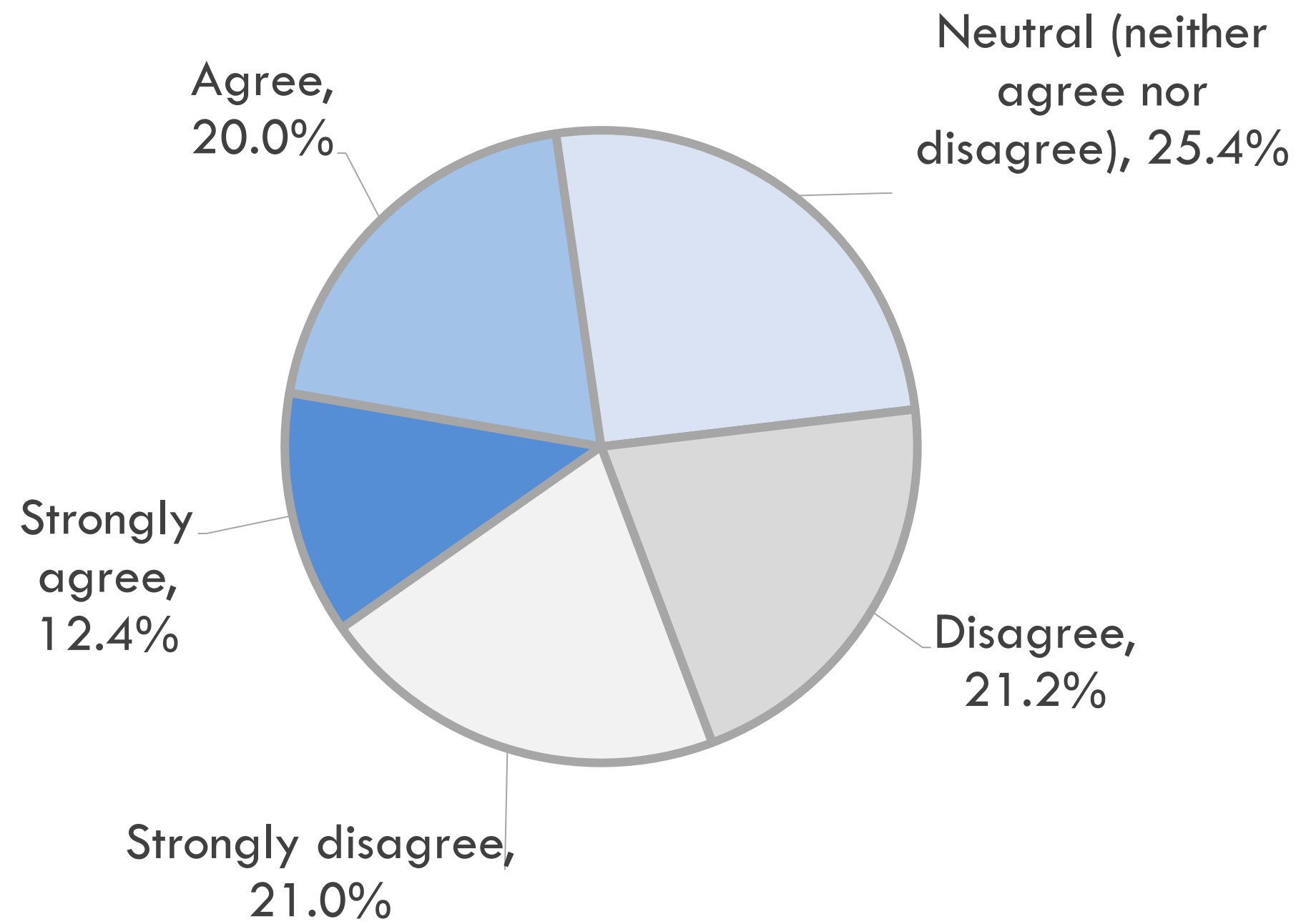
Historical data



EXPECTATIONS FOR TRAVELING IN THE FALL

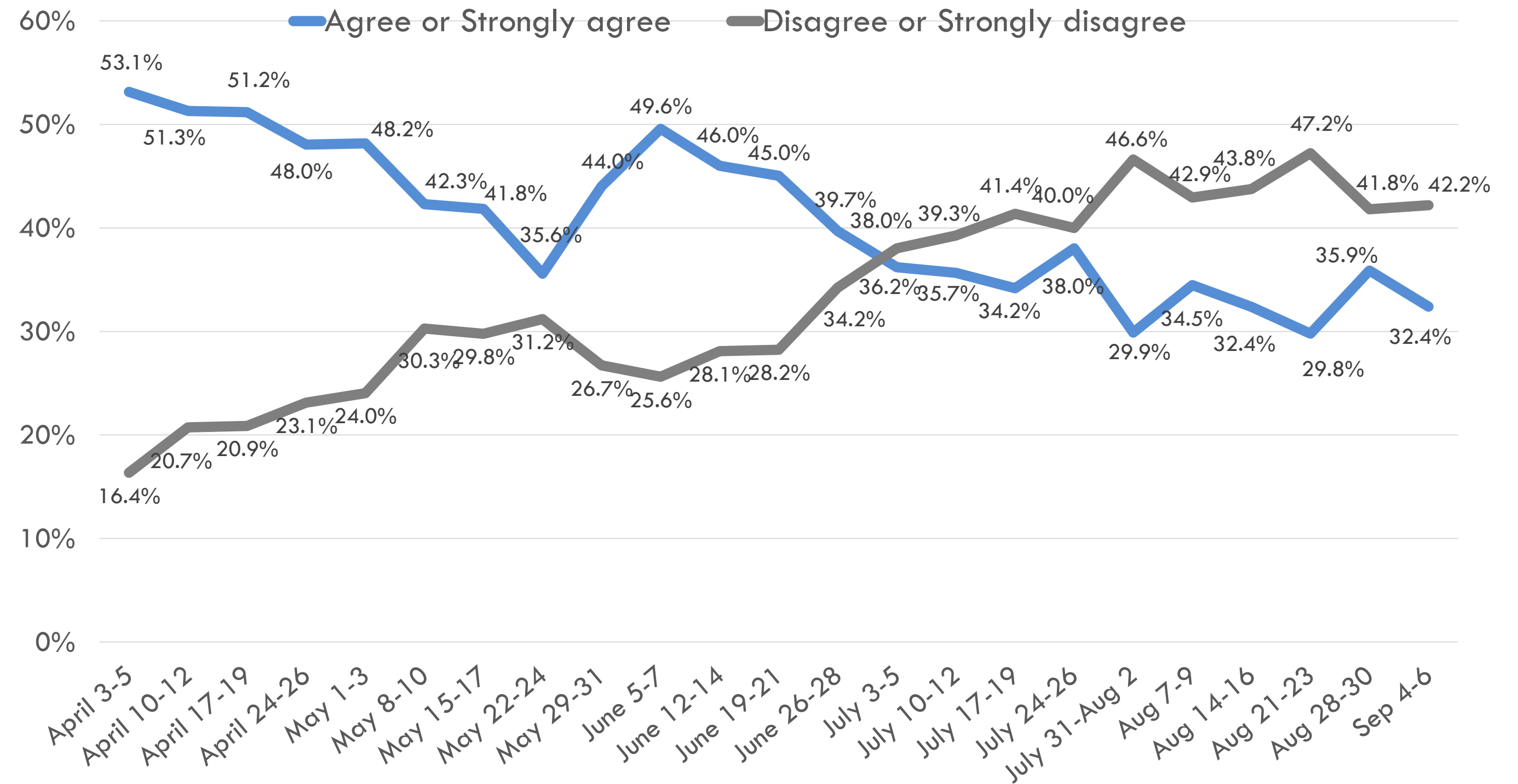
How much do you agree with the following statement?

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



(Base: Waves 4-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

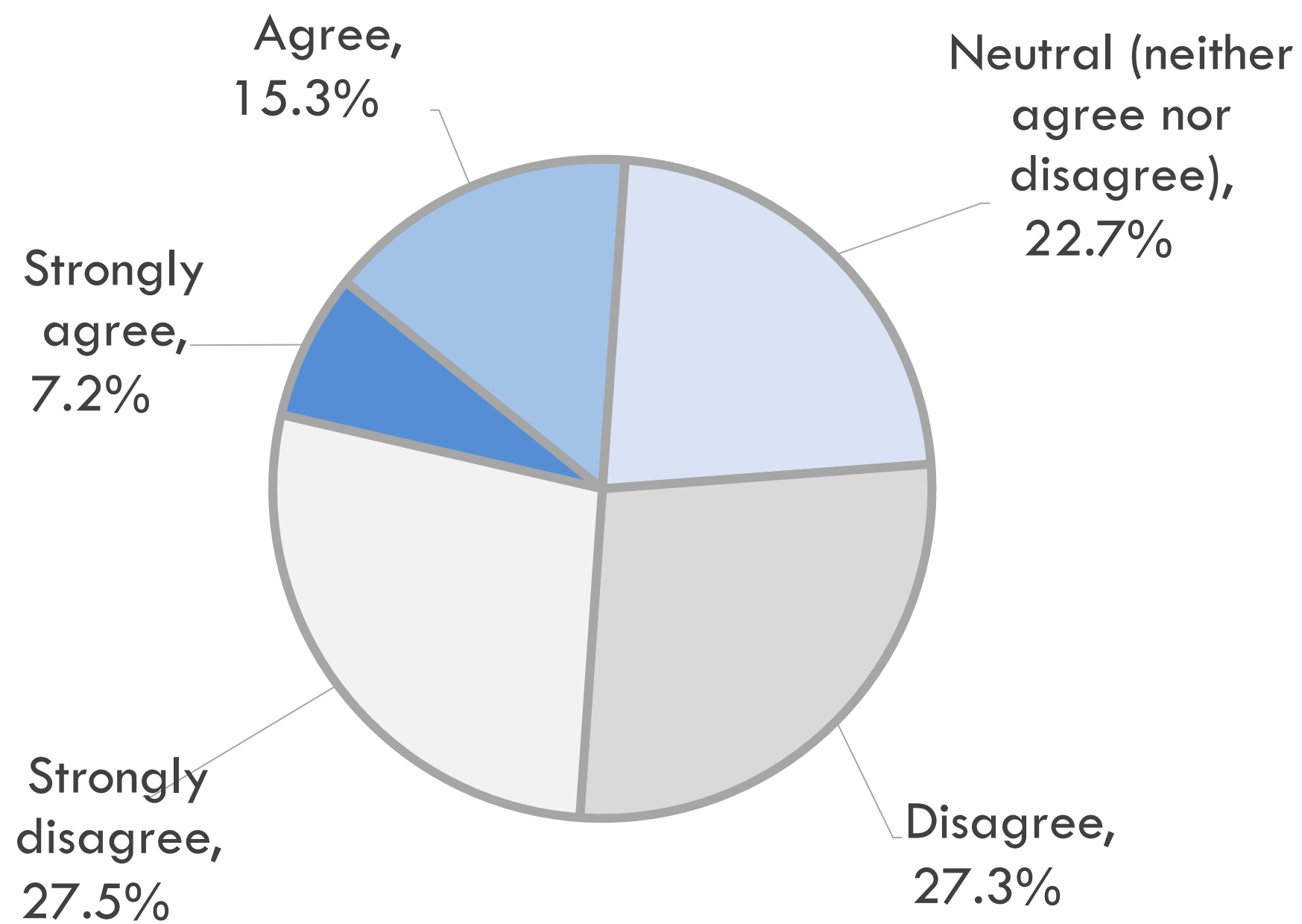
Historical data



EXPECTATIONS FOR THE PANDEMIC'S COURSE AT THE END OF 2020

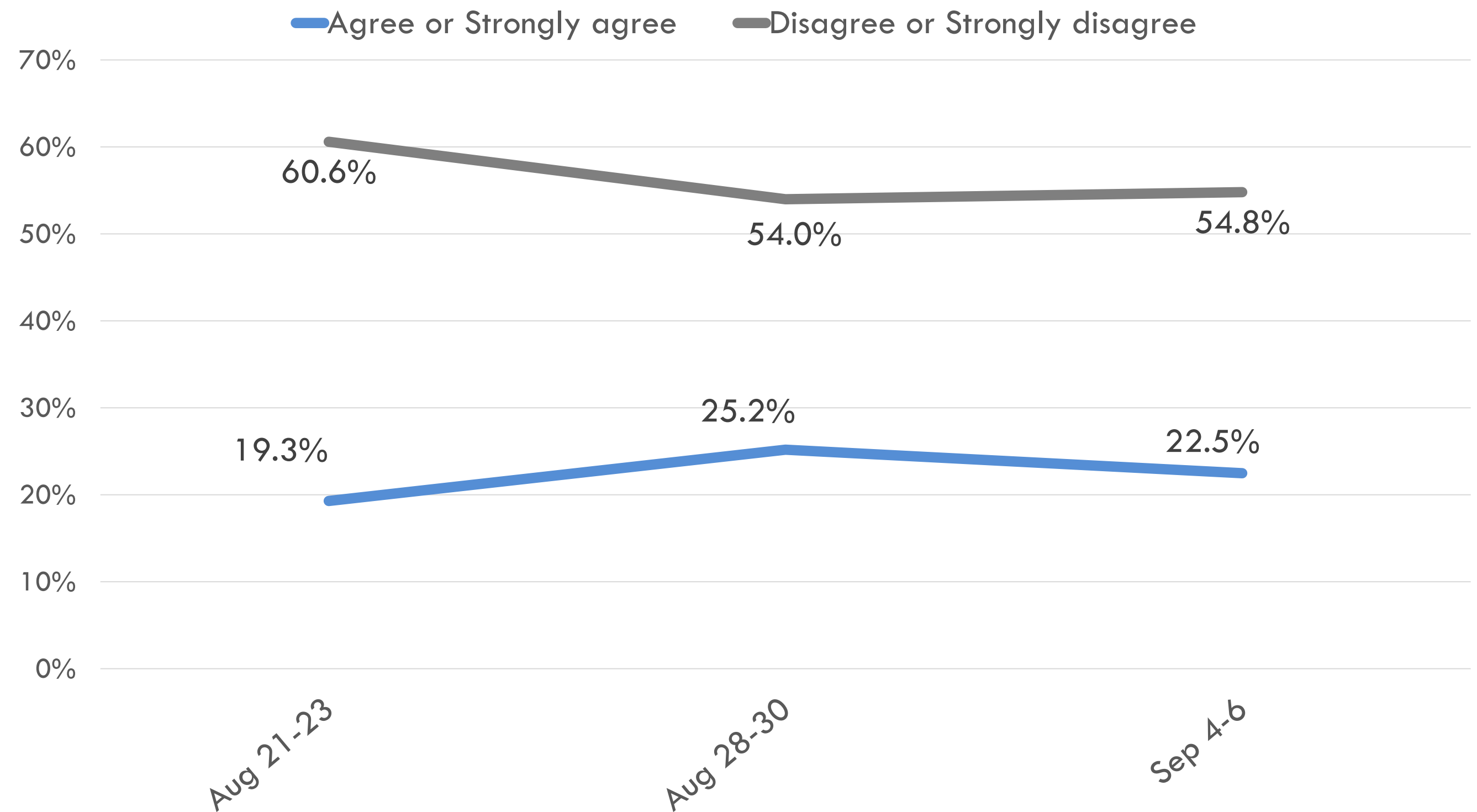
How much do you agree with the following statement?

Statement: I expect the Coronavirus situation will be resolved BEFORE THE END OF THIS YEAR.



(Base: Waves 24-26. All respondents, 1,207, 1,250 and 1,225 completed surveys.)

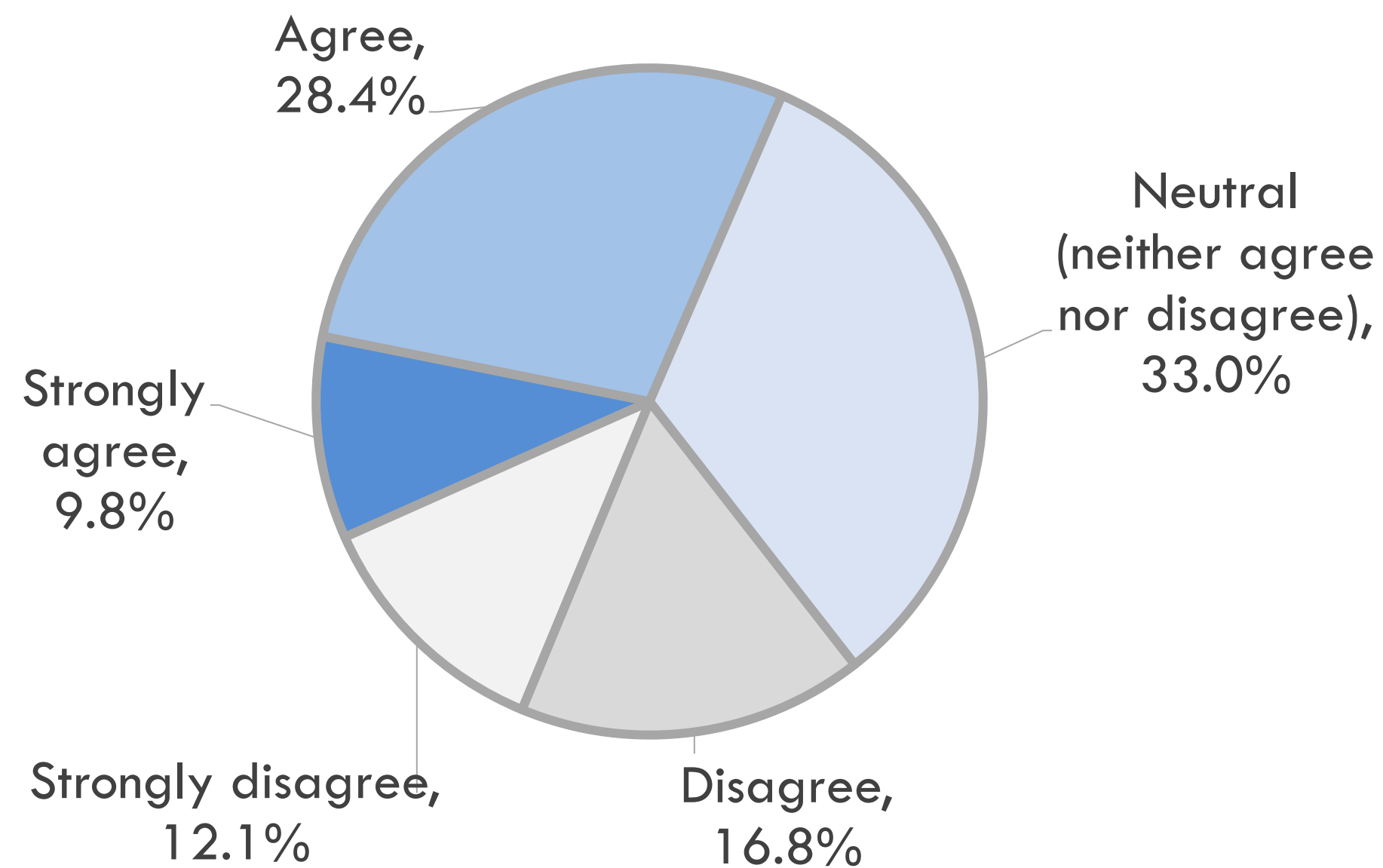
Historical data



DISCOUNTS AND PRICE CUTS

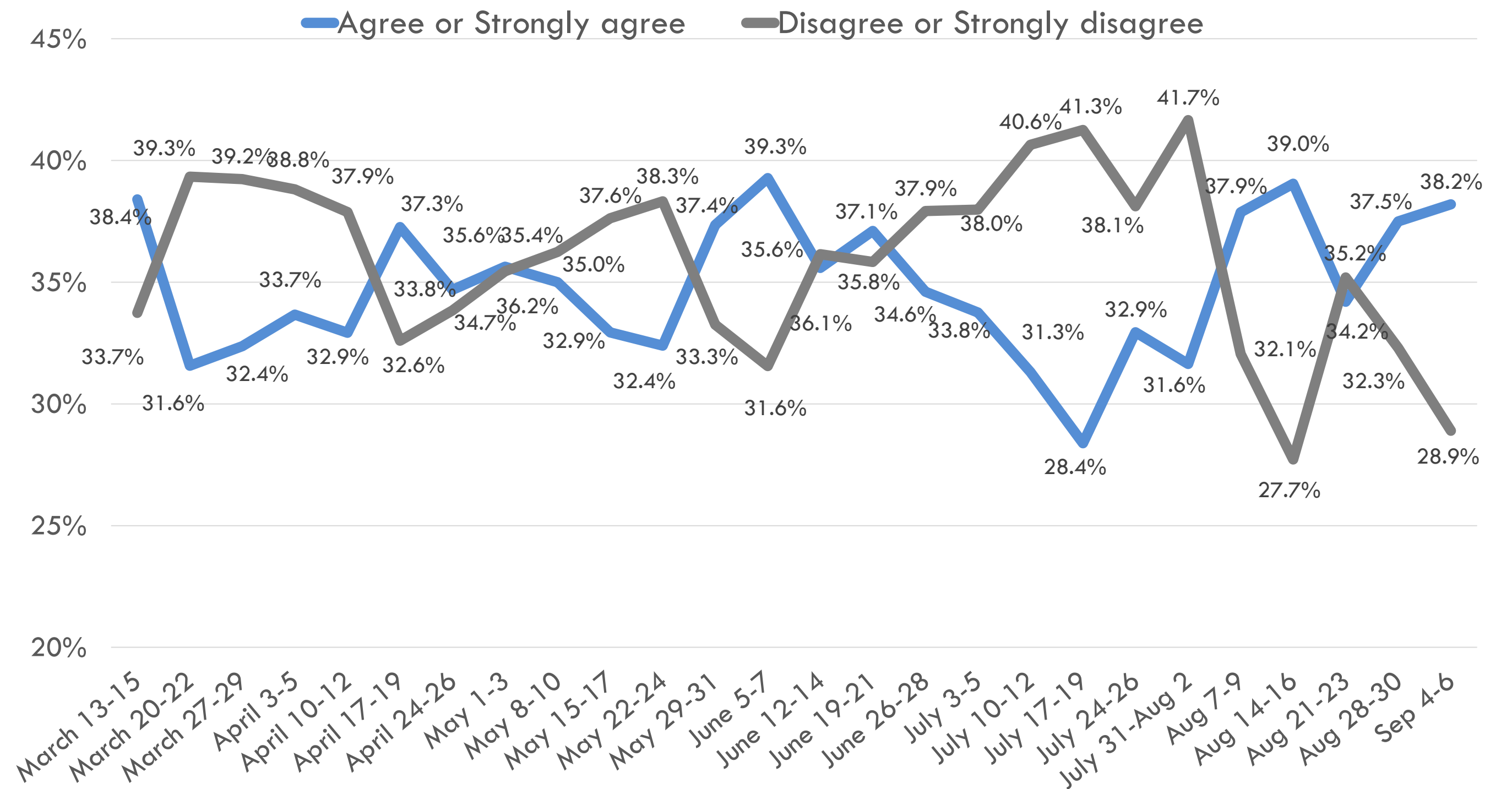
How much do you agree with the following statement?

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 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

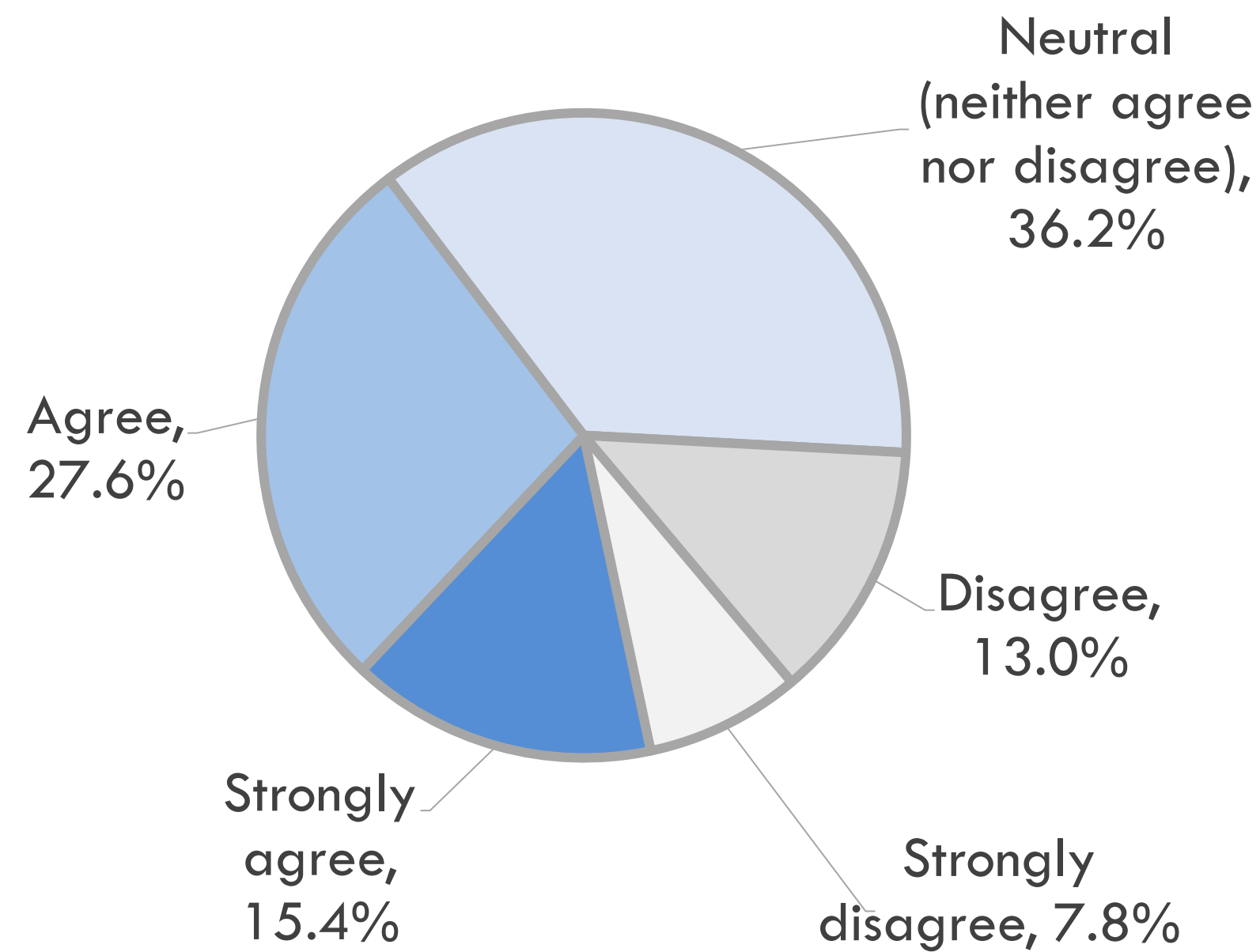
Historical data



ROAD TRIPS AS A REPLACEMENT FOR AIRLINE TRAVEL

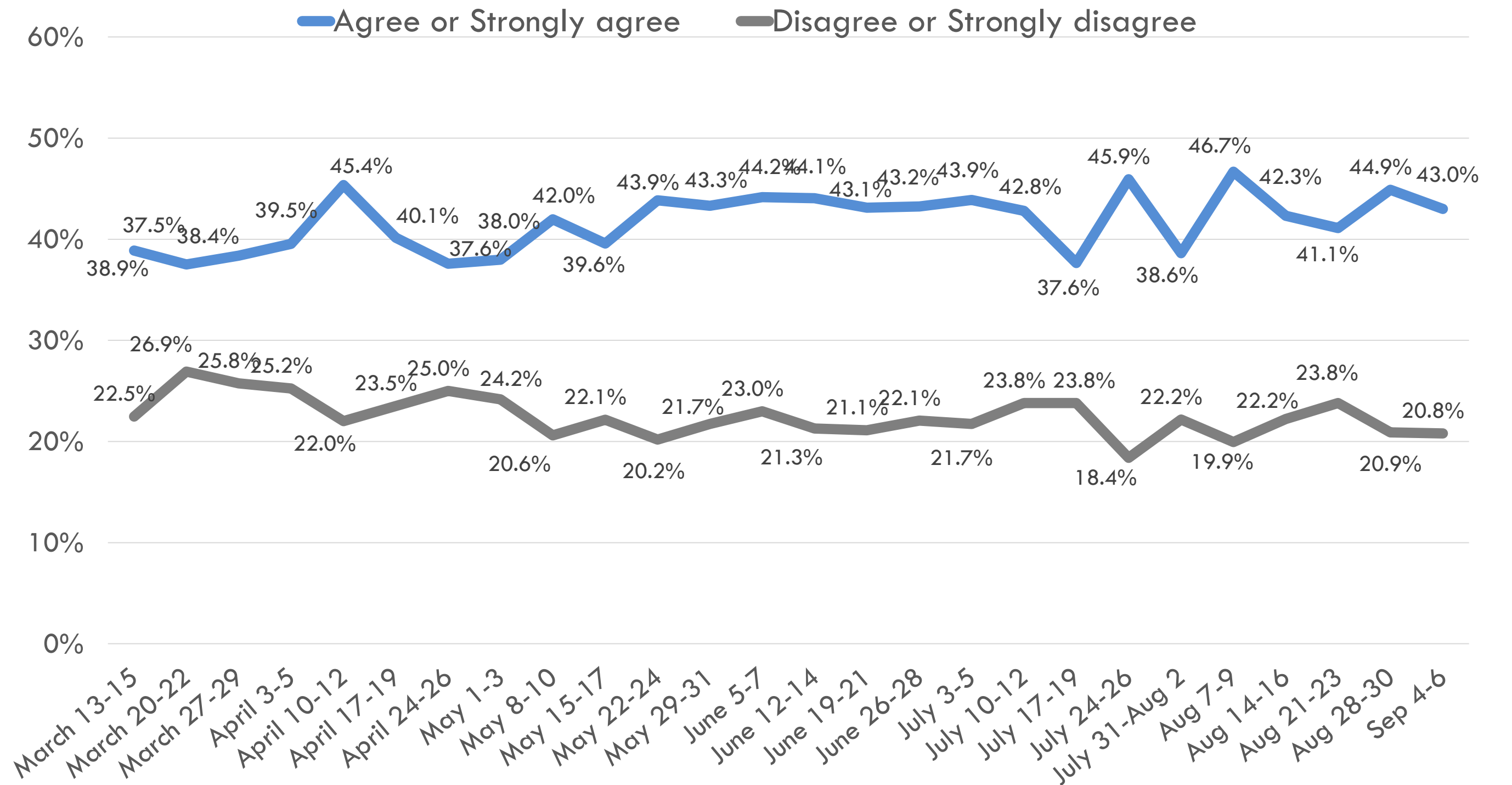
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

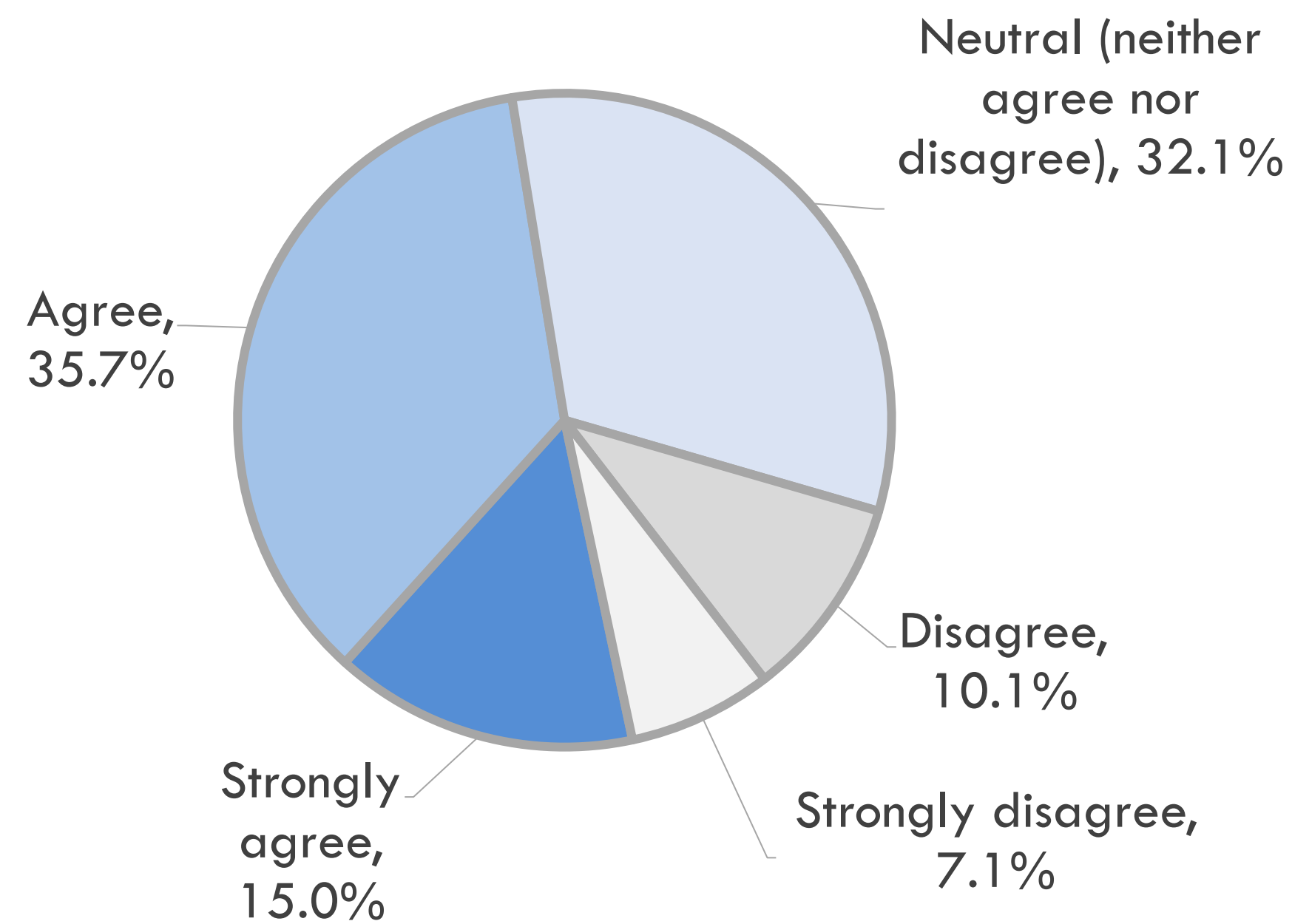
Historical data



REGIONAL TRIPS AS A REPLACEMENT FOR LONG-HAUL TRAVEL

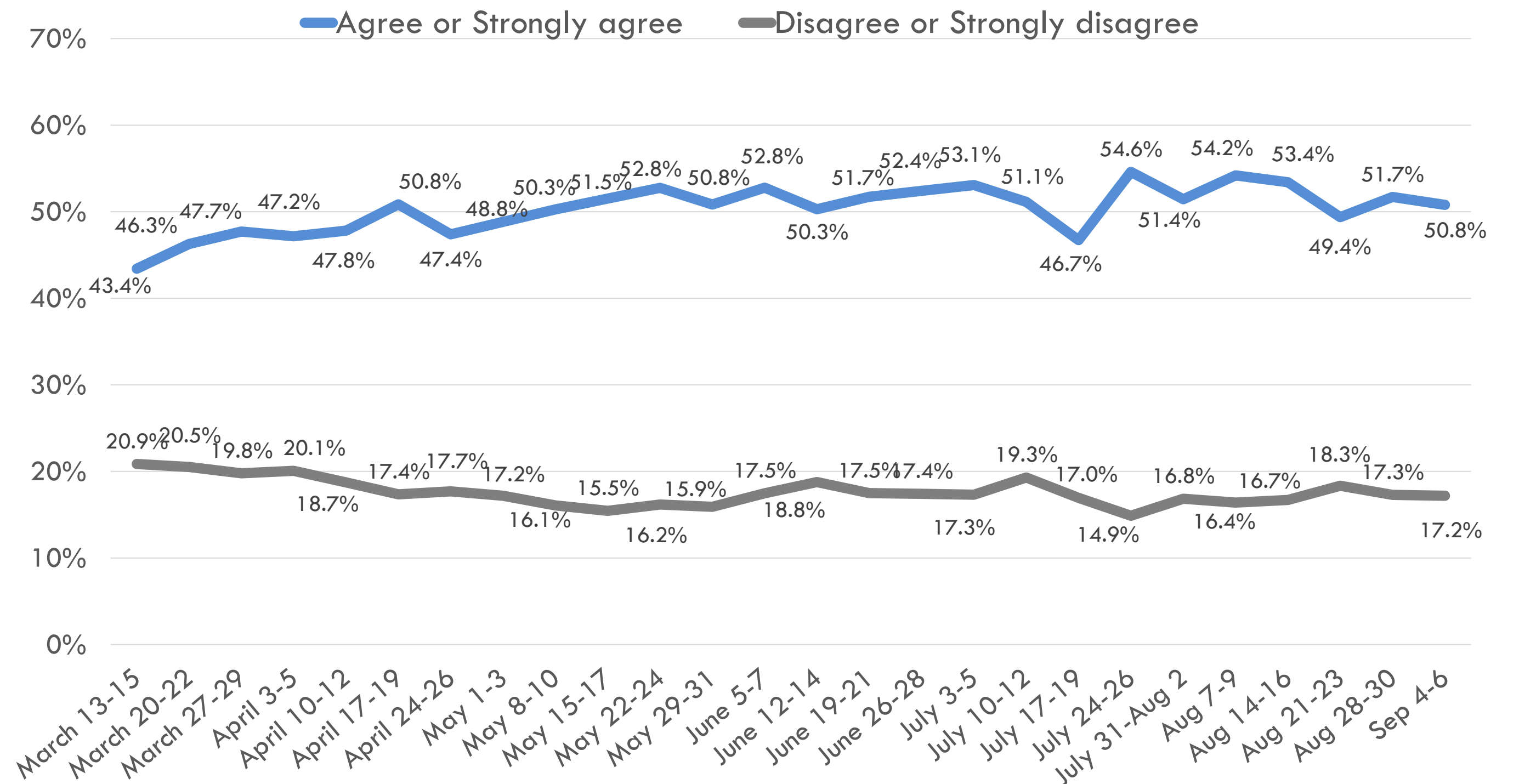
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

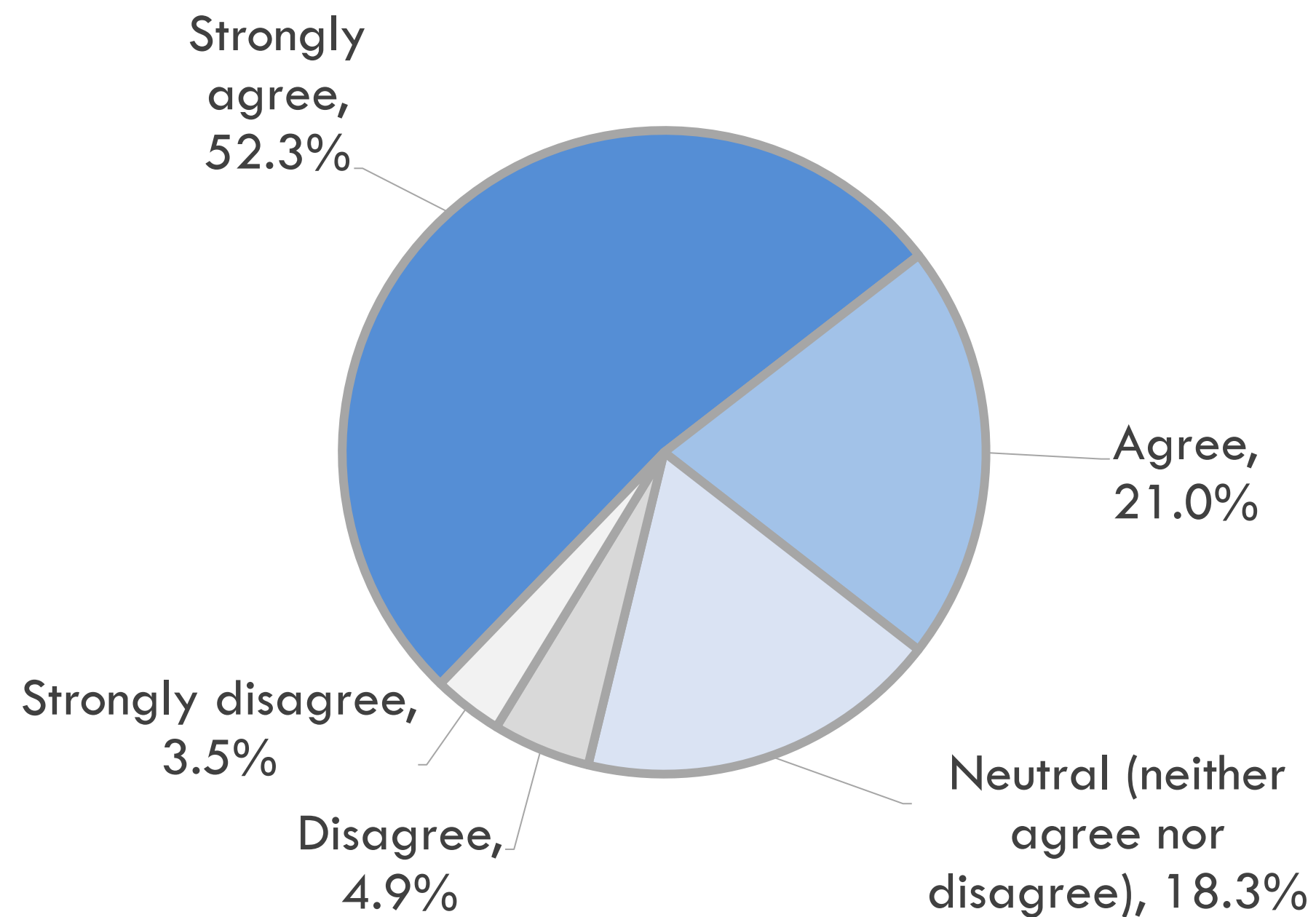
Historical data



AVOIDING INTERNATIONAL TRAVEL

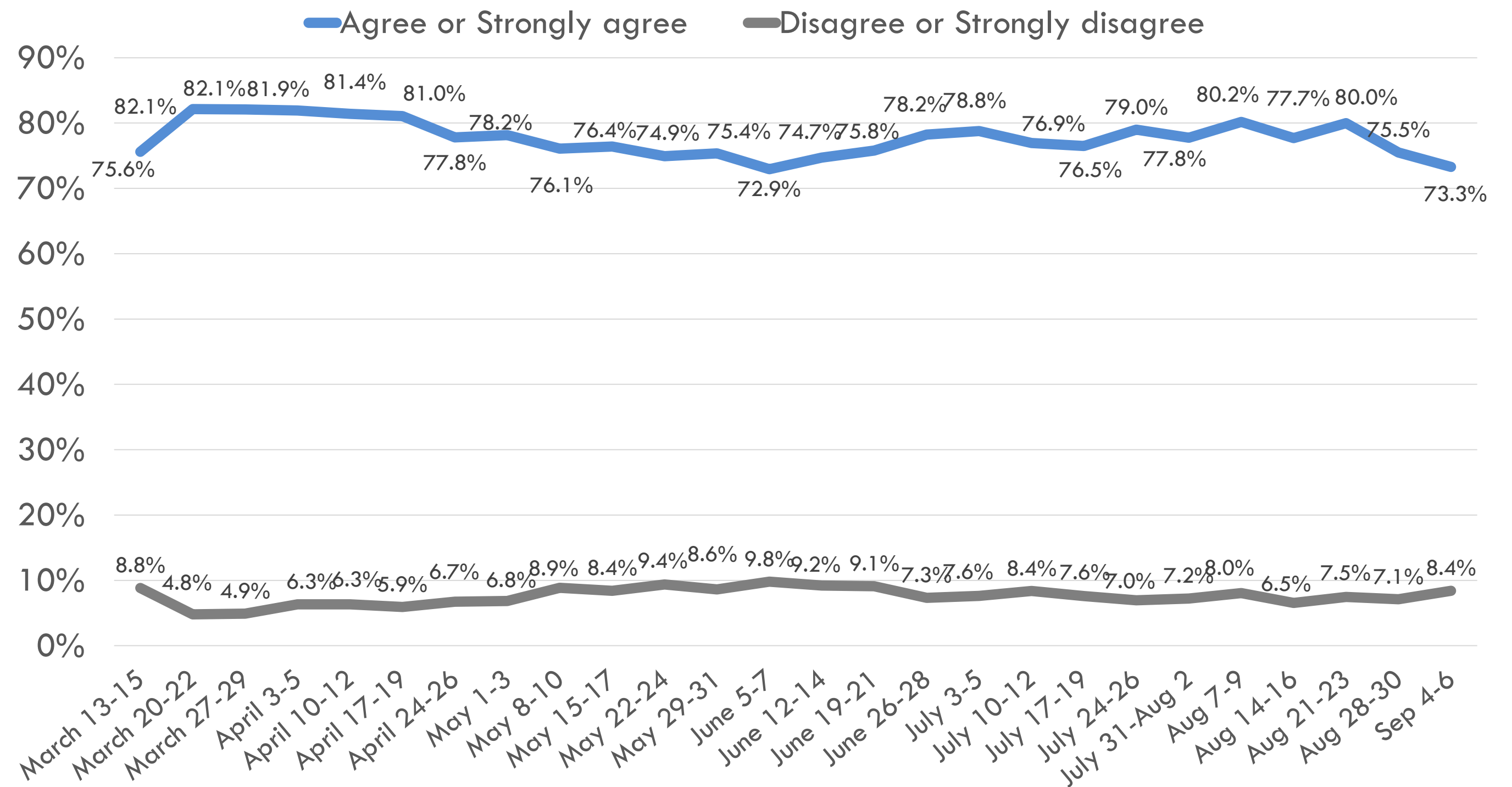
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

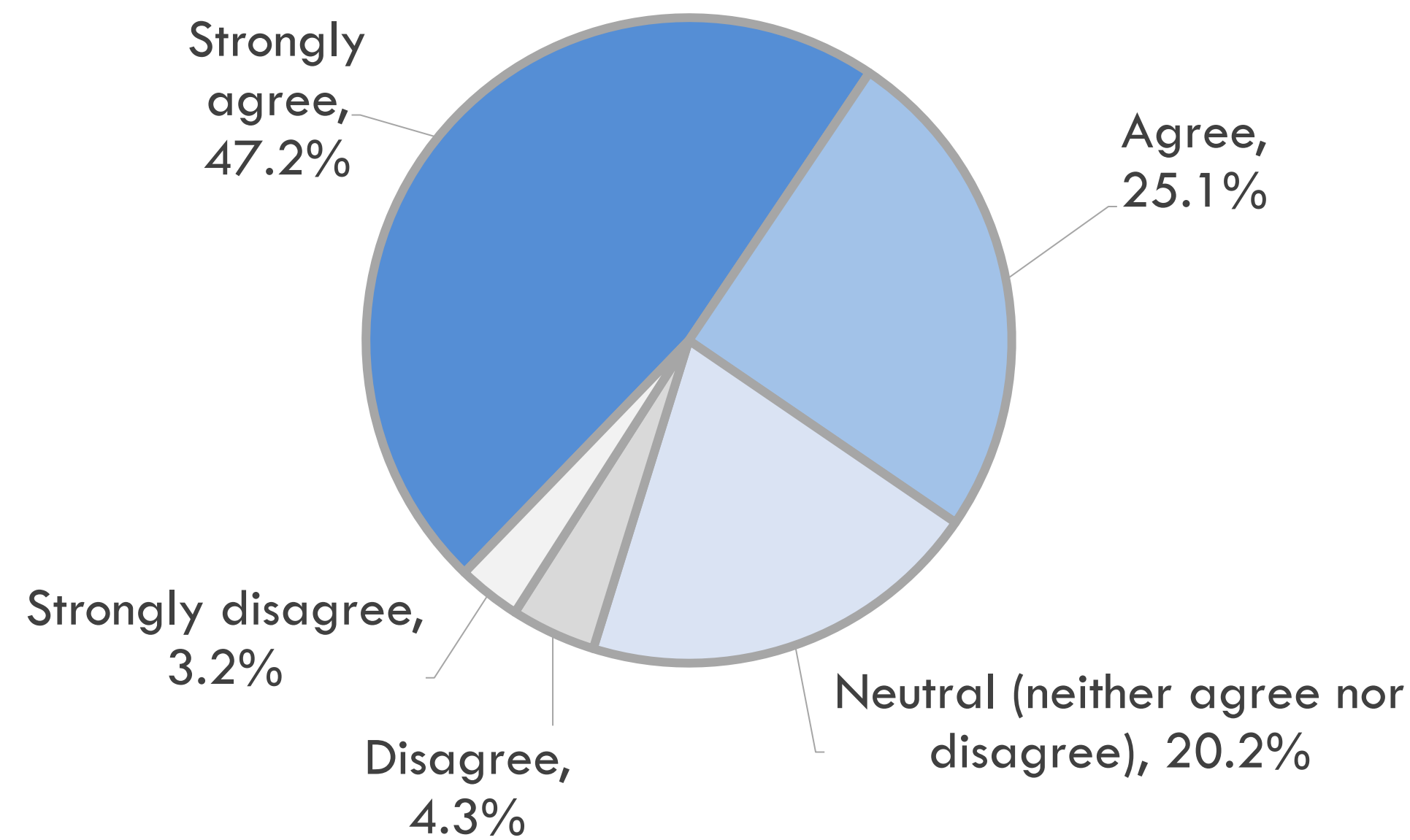
Historical data



AVOIDING CONVENTIONS & CONFERENCES

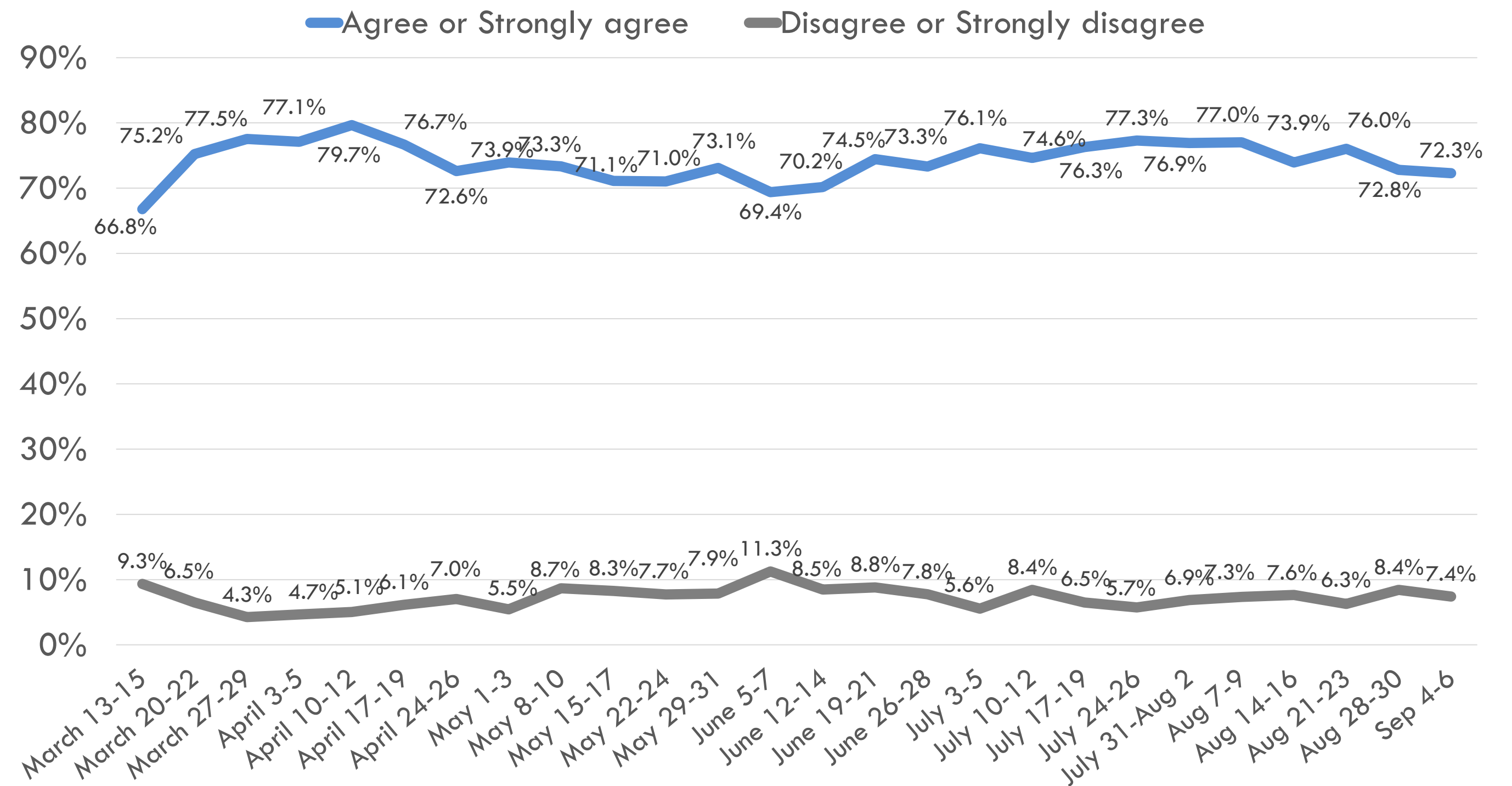
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

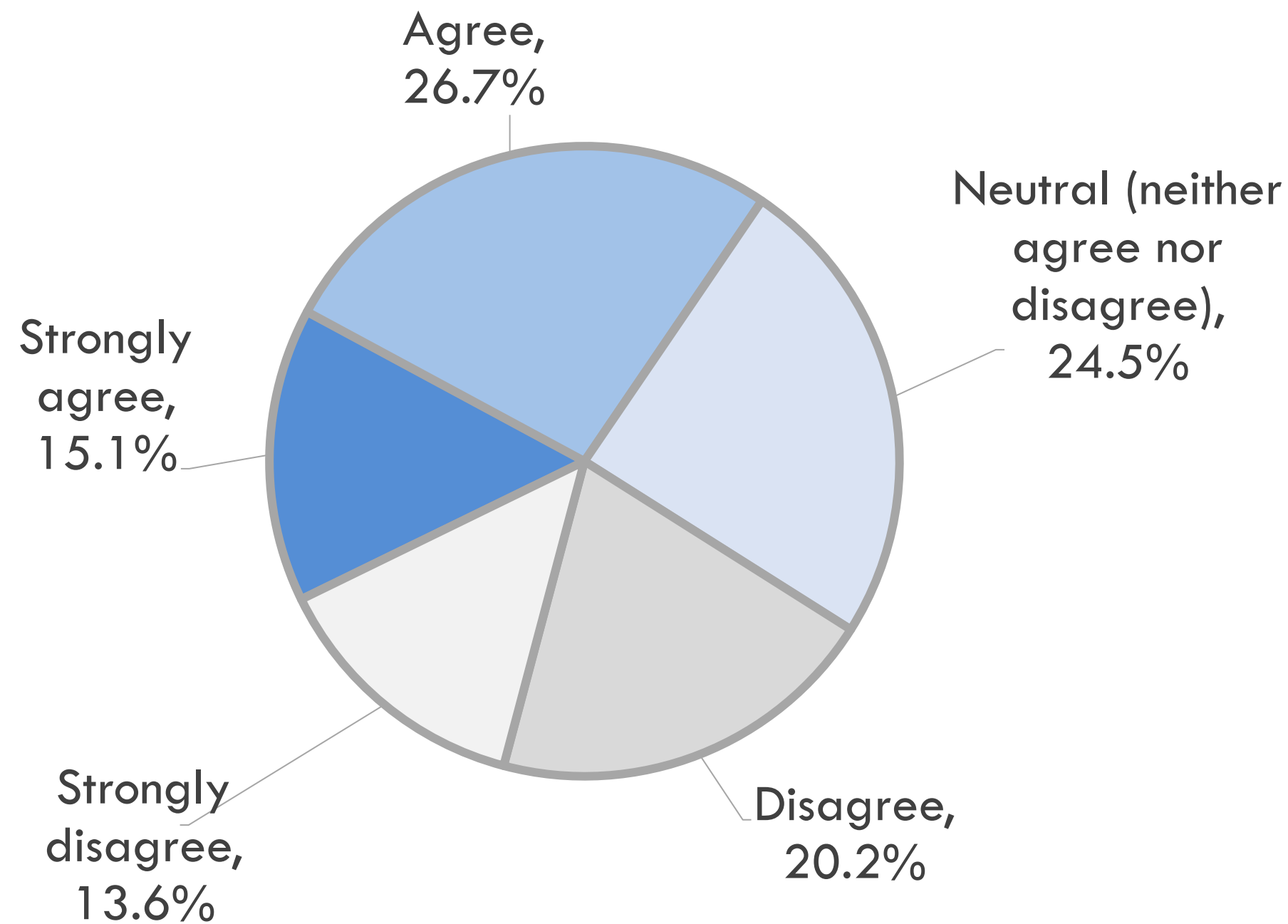
Historical data



COMFORT ENJOYING HOME COMMUNITY

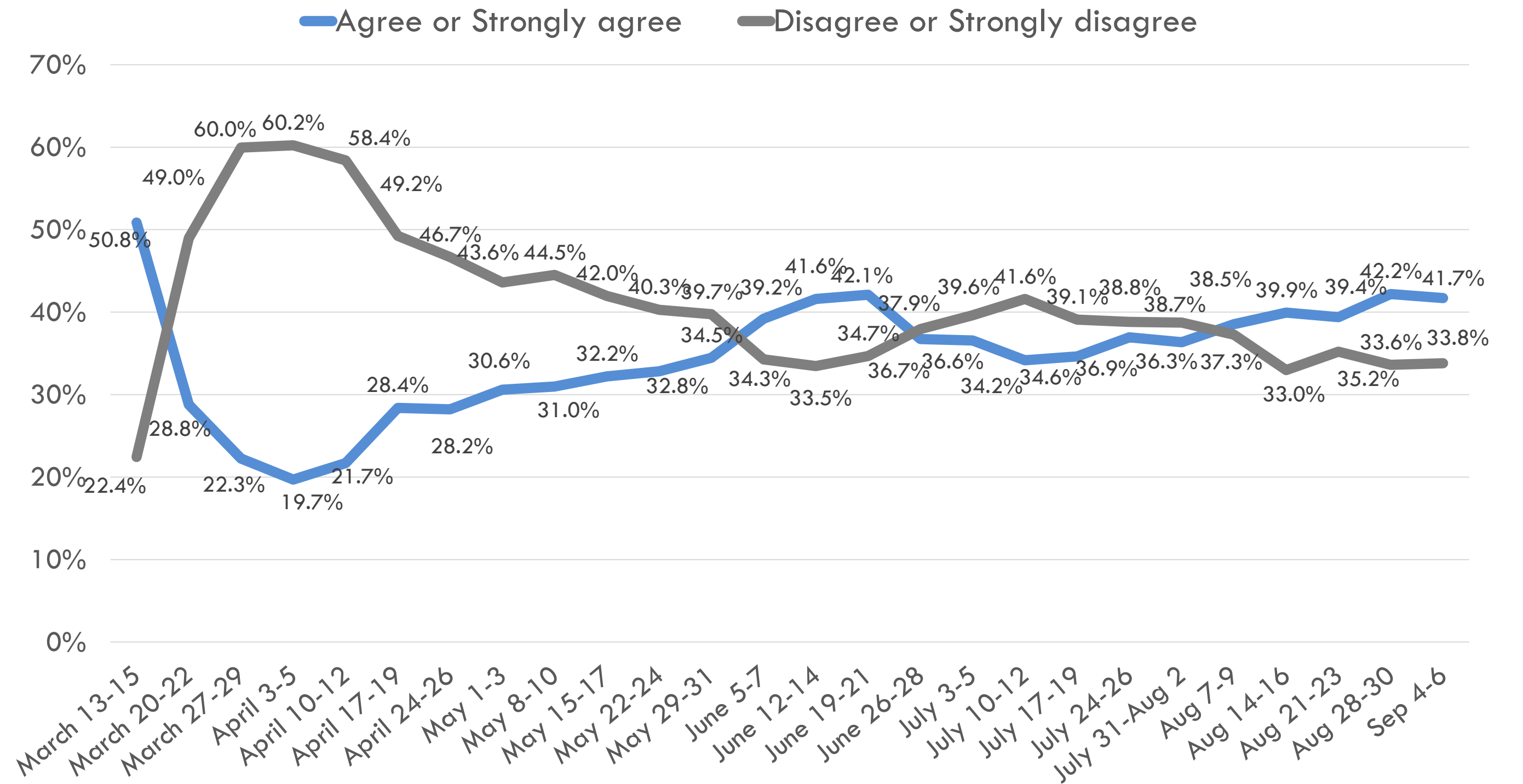
How much do you agree with the following statement?

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



(Base: Waves 1-26. 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, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

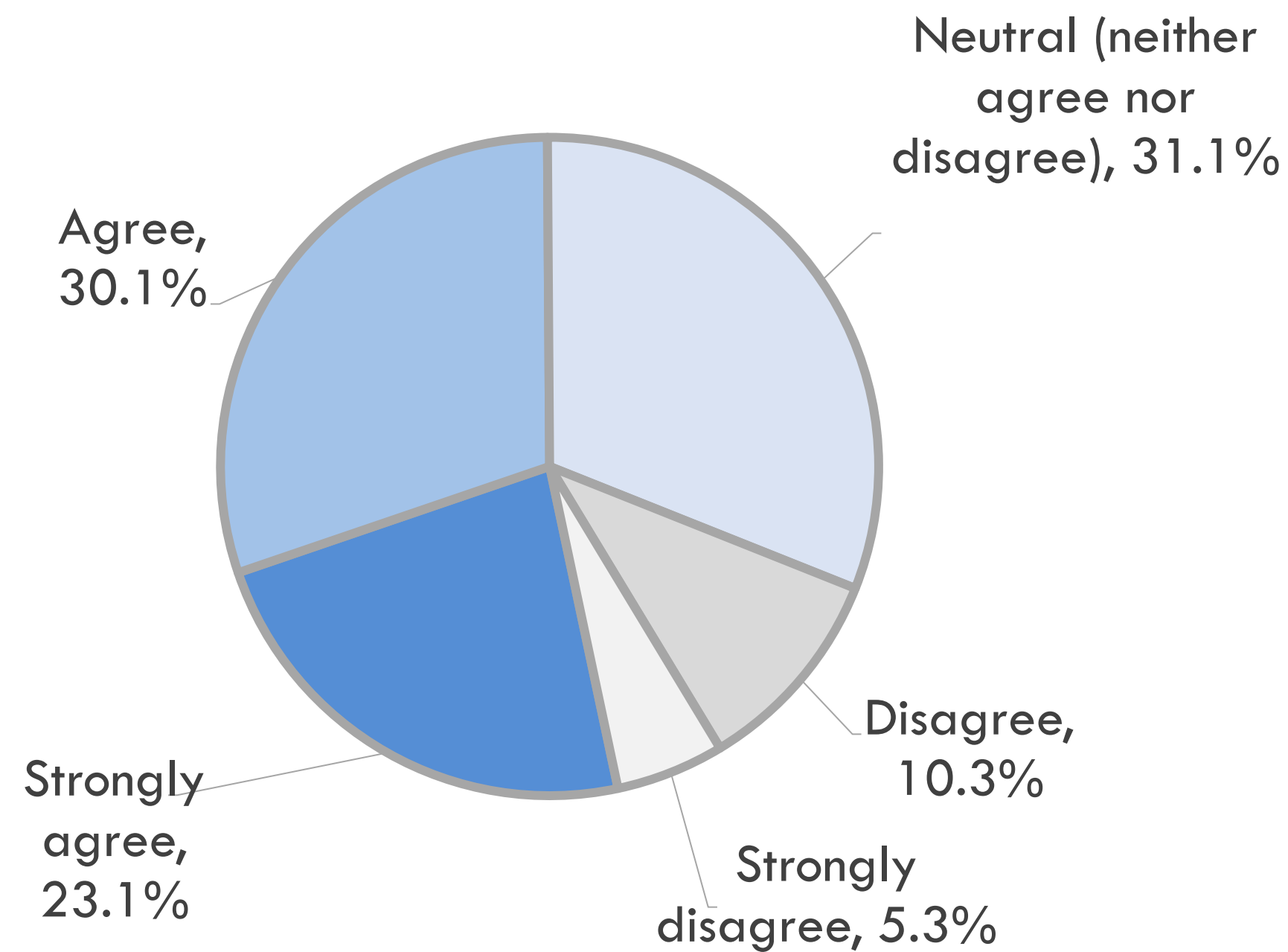
Historical data



TRAVELERS IN COMMUNITY ARE UNWANTED

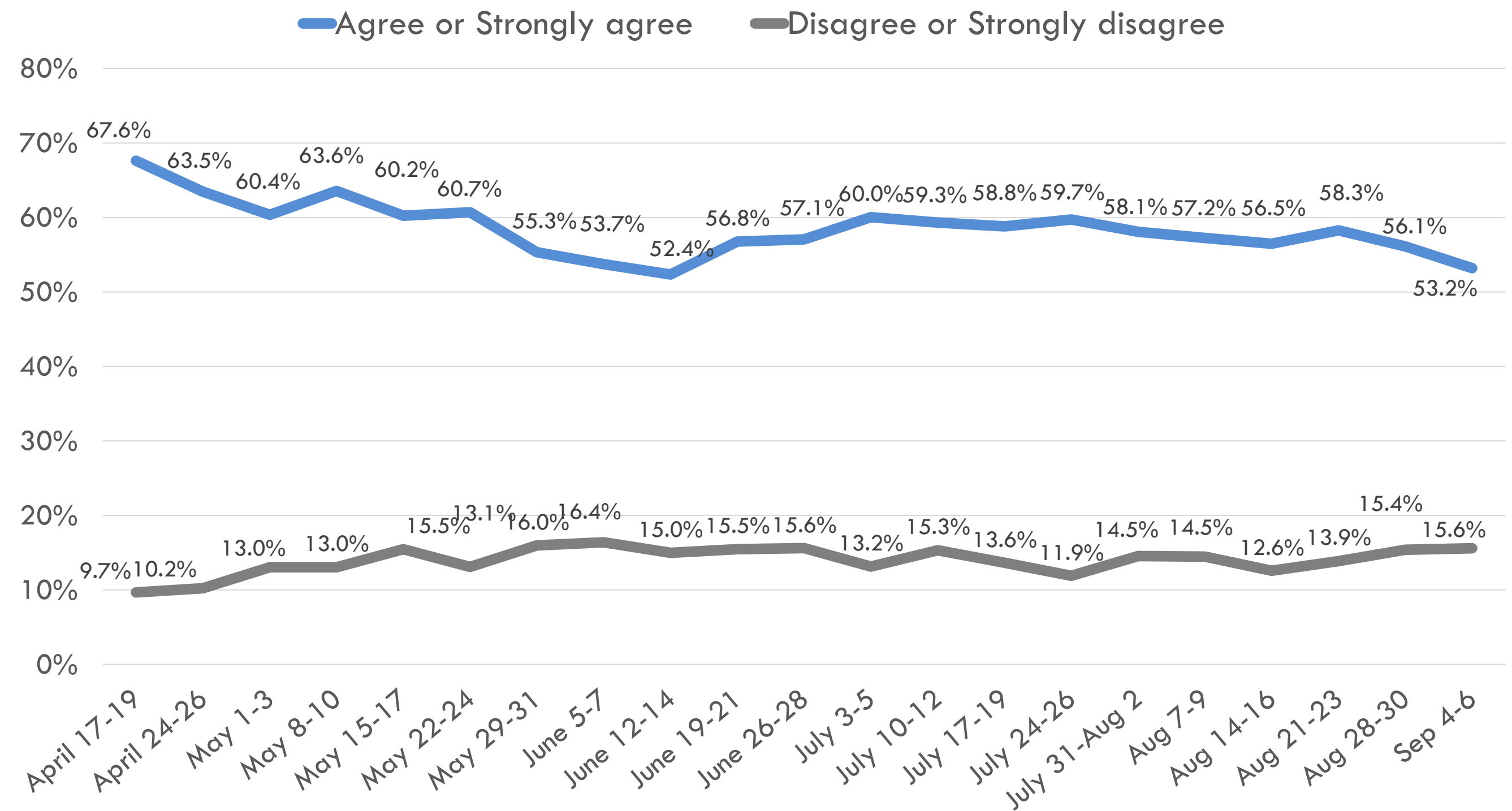
How much do you agree with the following statement?

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



(Base: Waves 6-26. 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, 1,202, 1,207, 1,250 and 1,225 completed survey.)

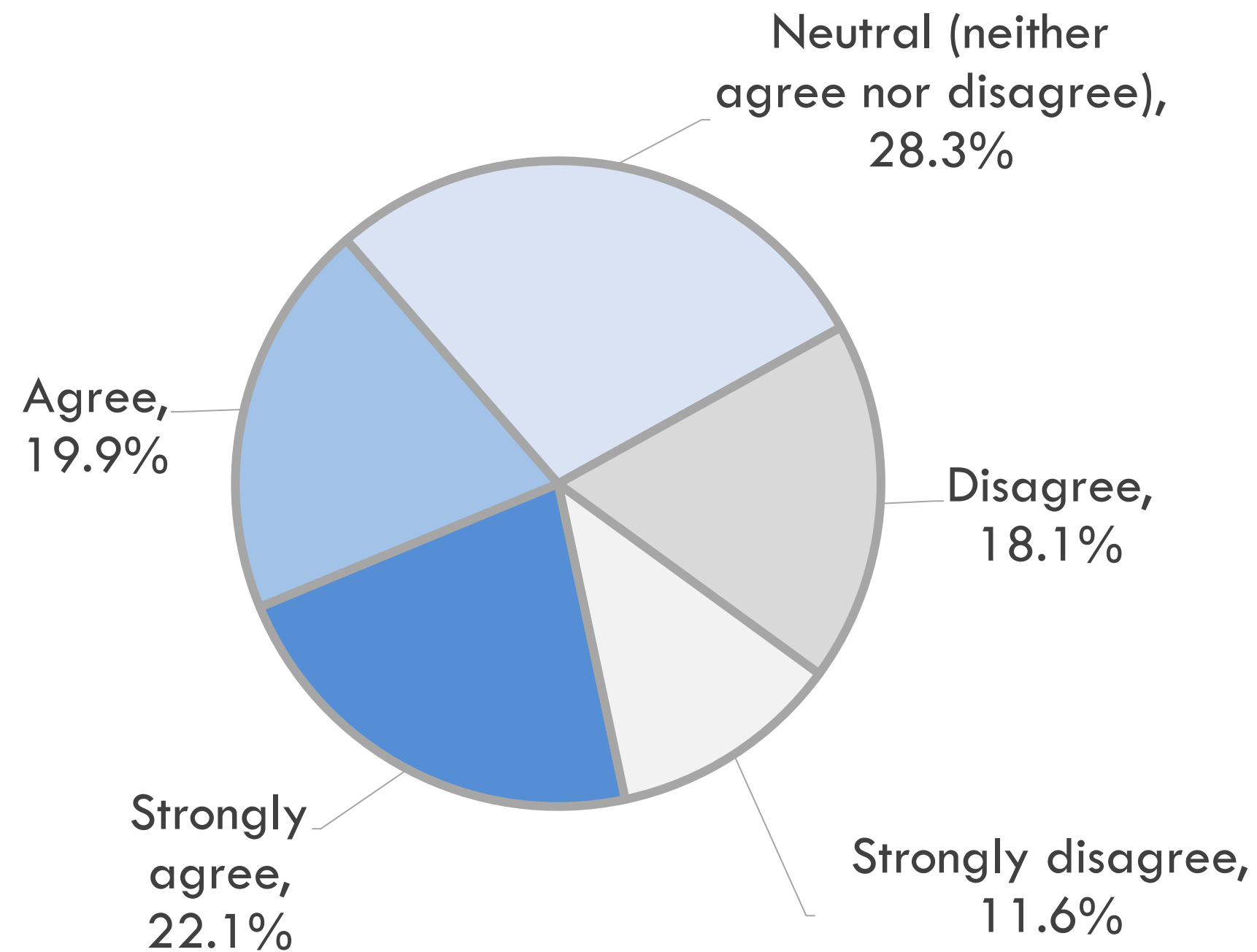
Historical data



WON'T TRAVEL WITHOUT VACCINE

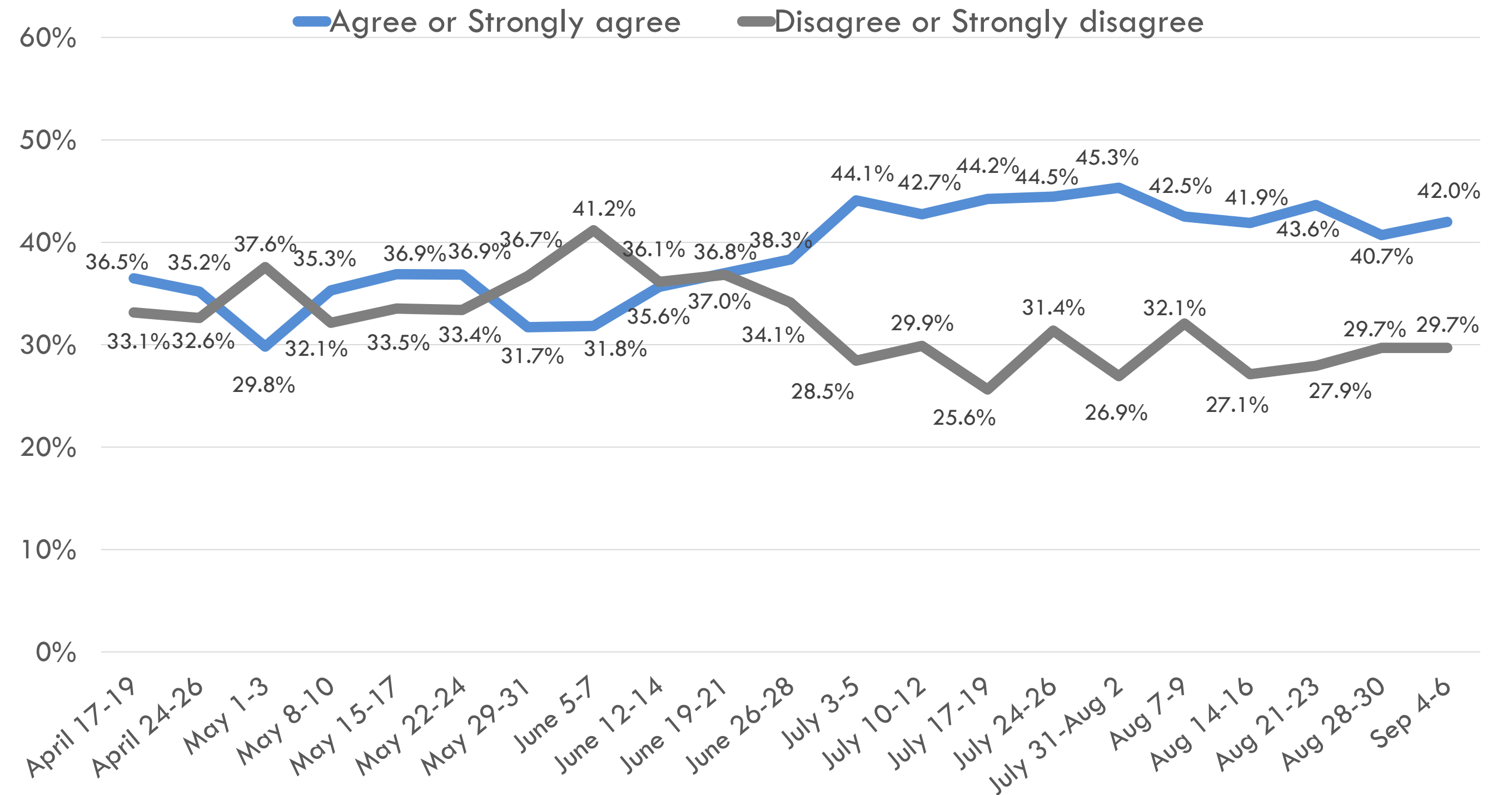
How much do you agree with the following statement?

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



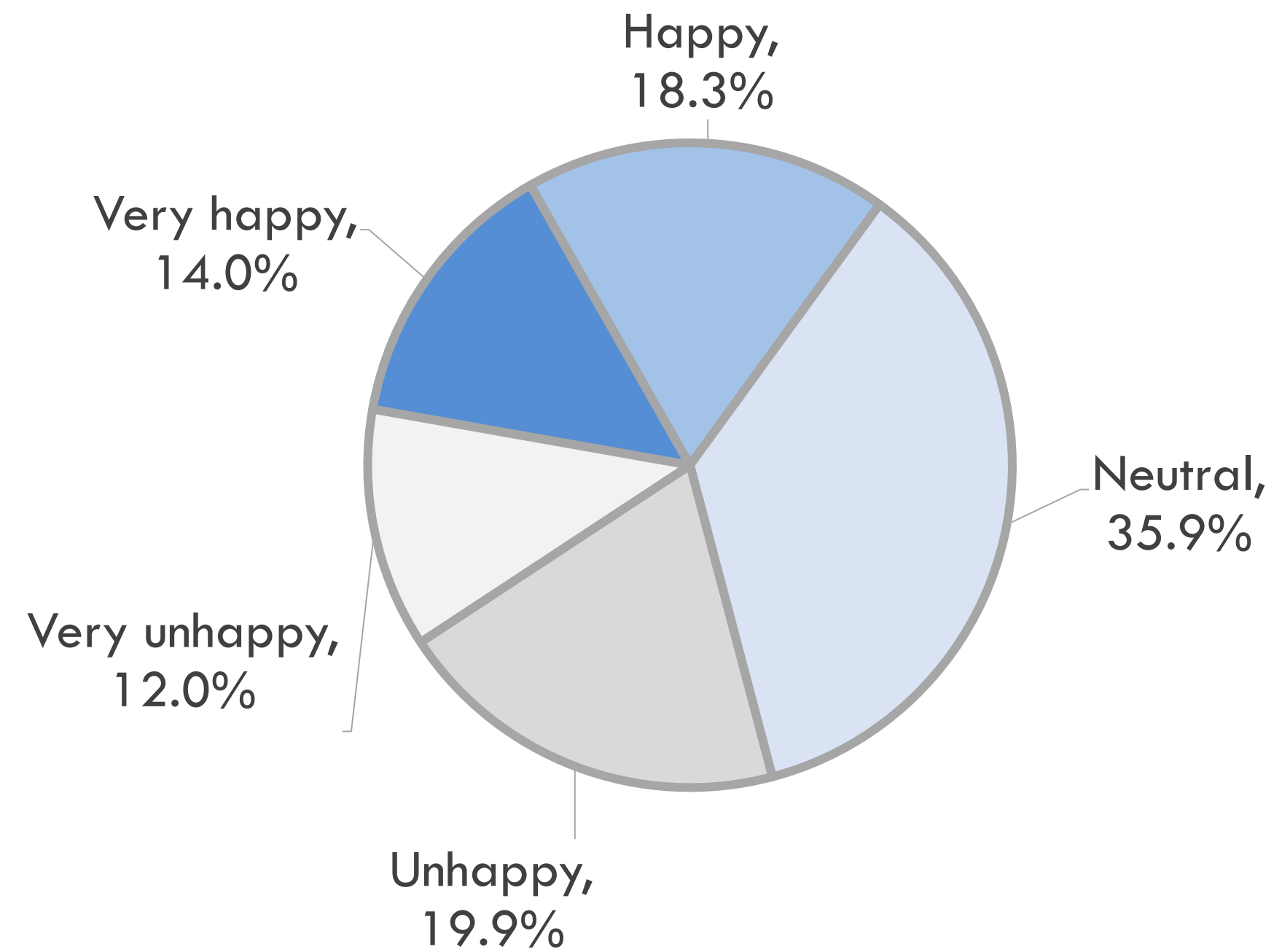
(Base: Waves 6-26. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

Historical data



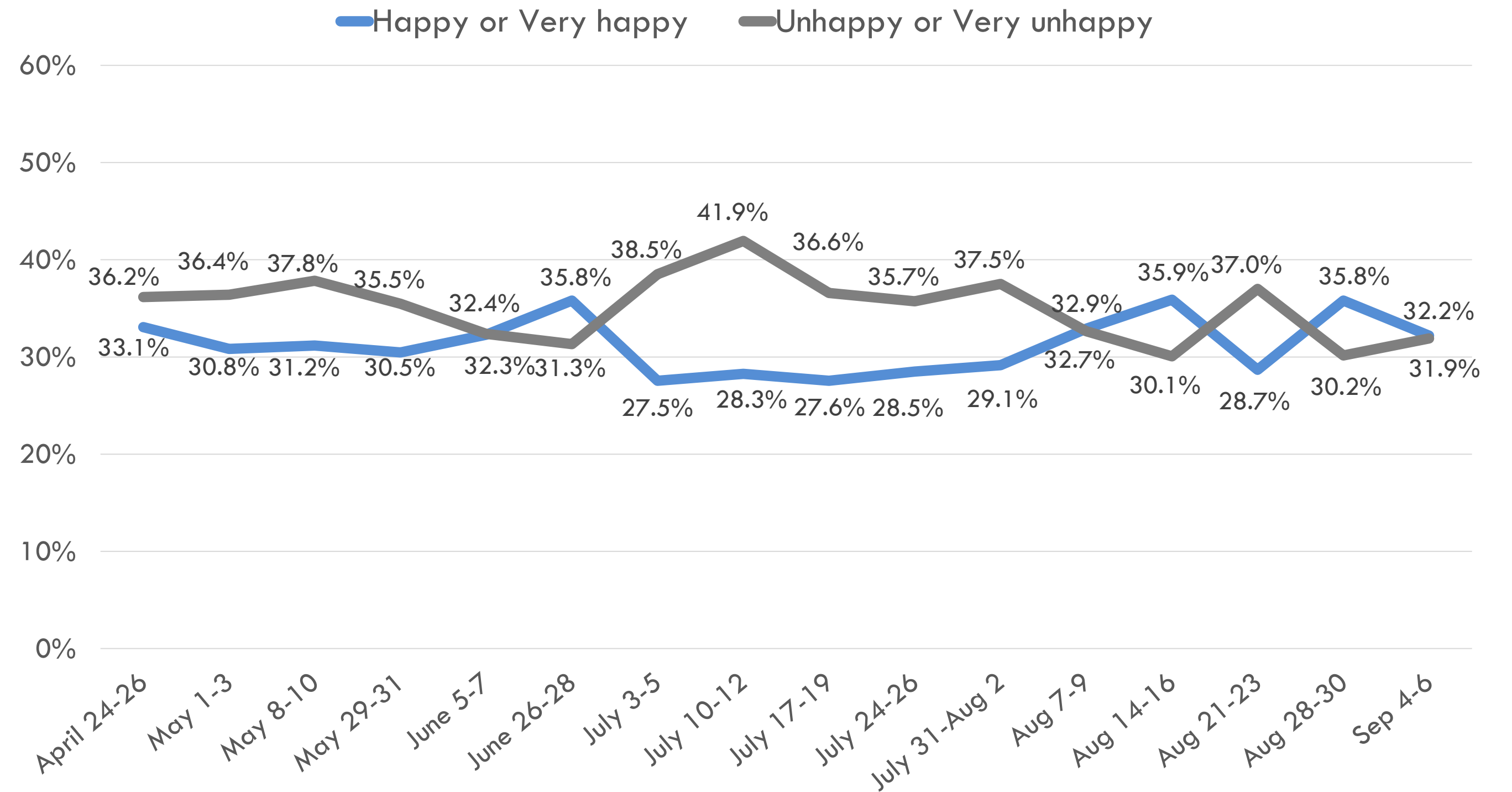
FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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, 12-13 and 16-26. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

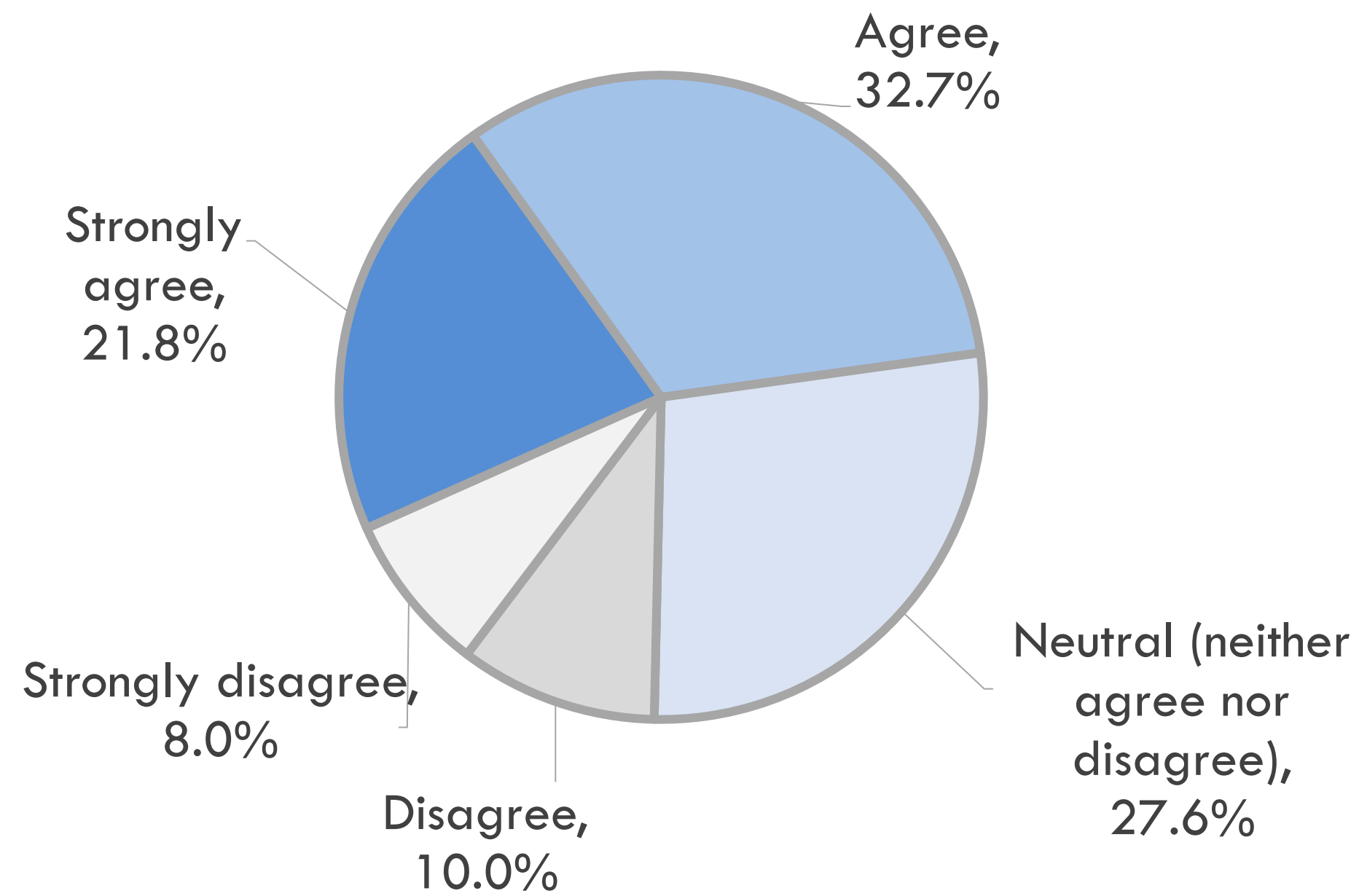
Historical data



HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS

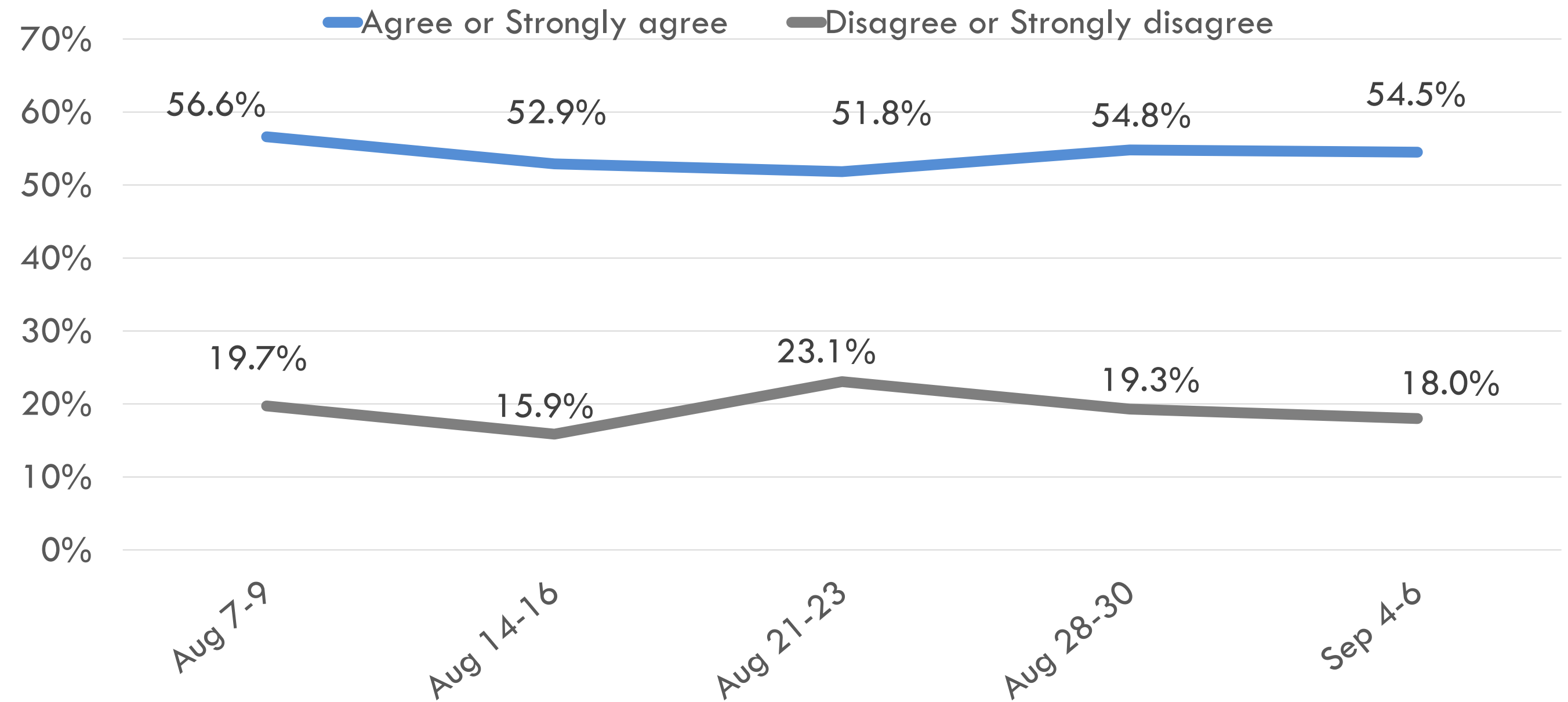
How much do you agree with the following statement?

Statement: Having a vacation scheduled in the next six months would make me feel there is something happy to look forward to.



(Base: Waves 22-26. All respondents, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

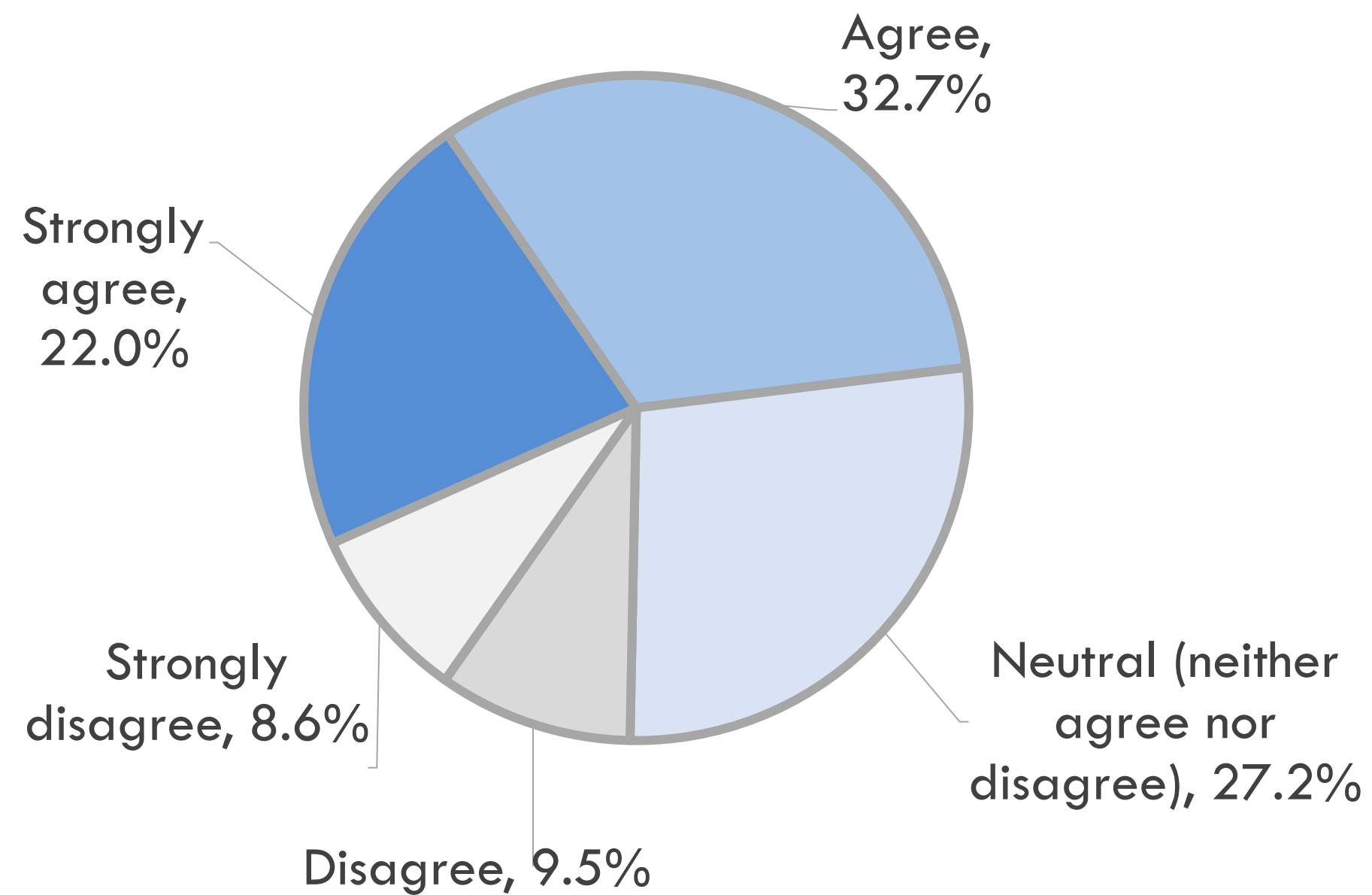
Historical data



HAPPINESS PLANNING A VACATION WITHIN NEXT 6 MONTHS

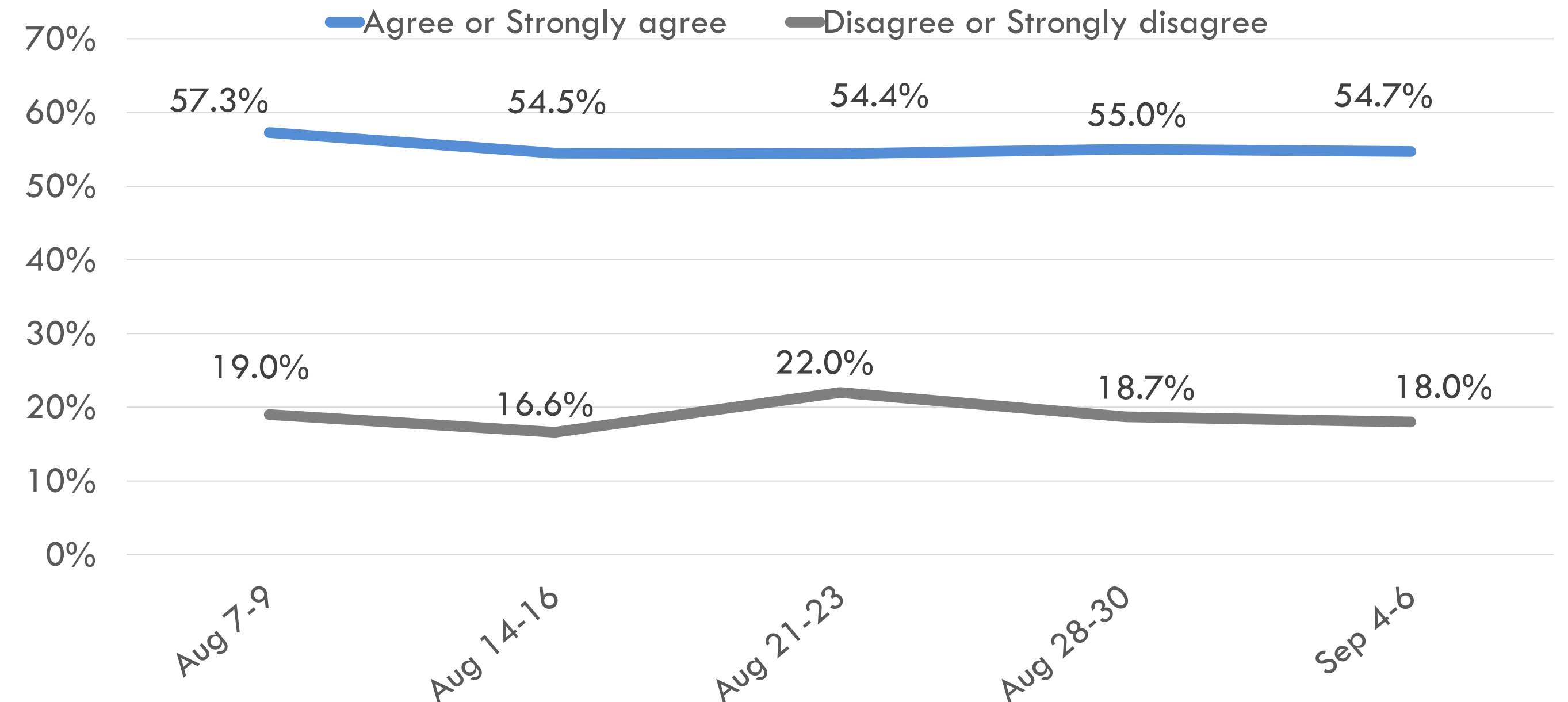
How much do you agree with the following statement?

Statement: Planning a vacation for sometime in the next six months would bring me happiness.



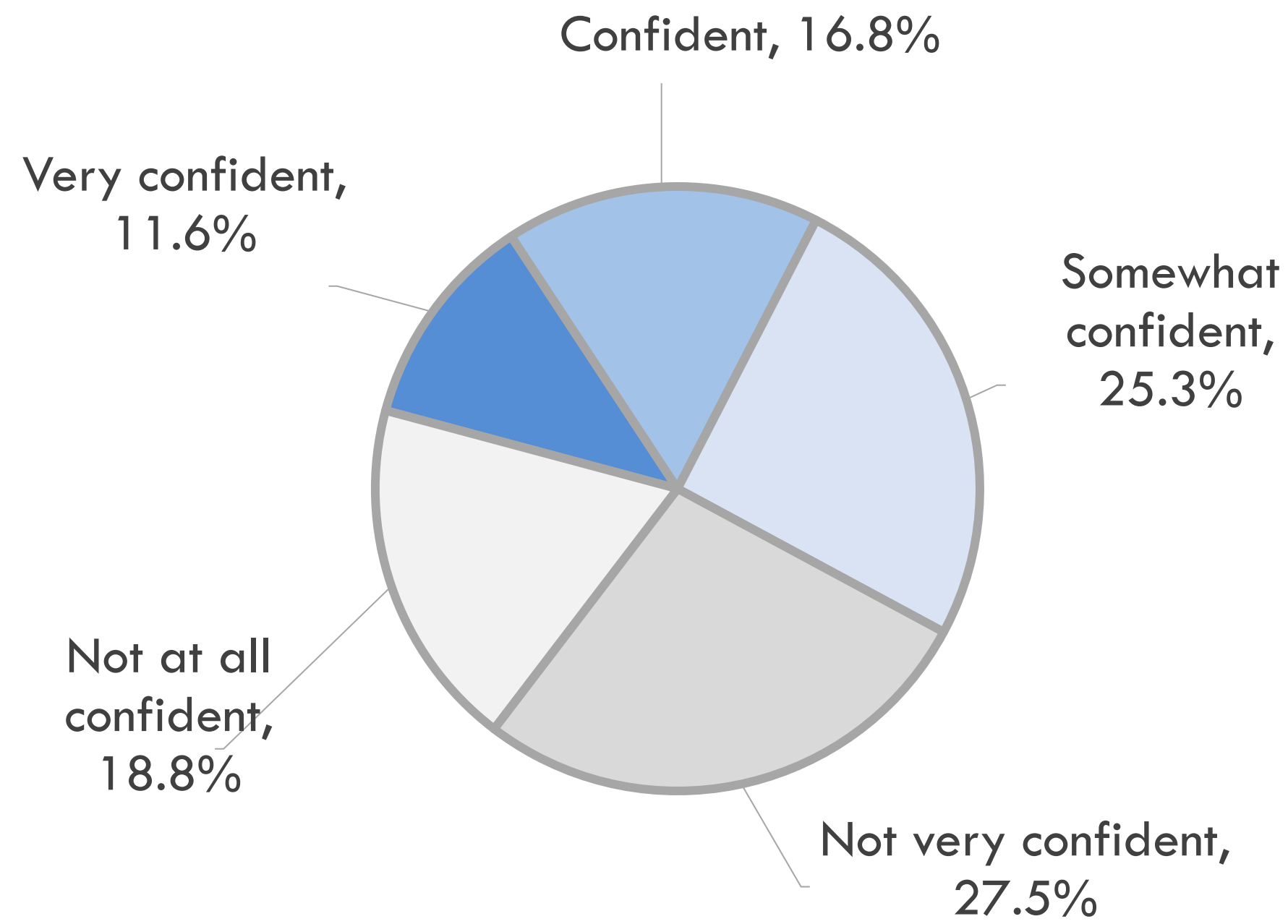
(Base: Waves 22-26. All respondents, 1,201, 1,202, 1,207, 1,250 and 1,225 completed surveys.)

Historical data

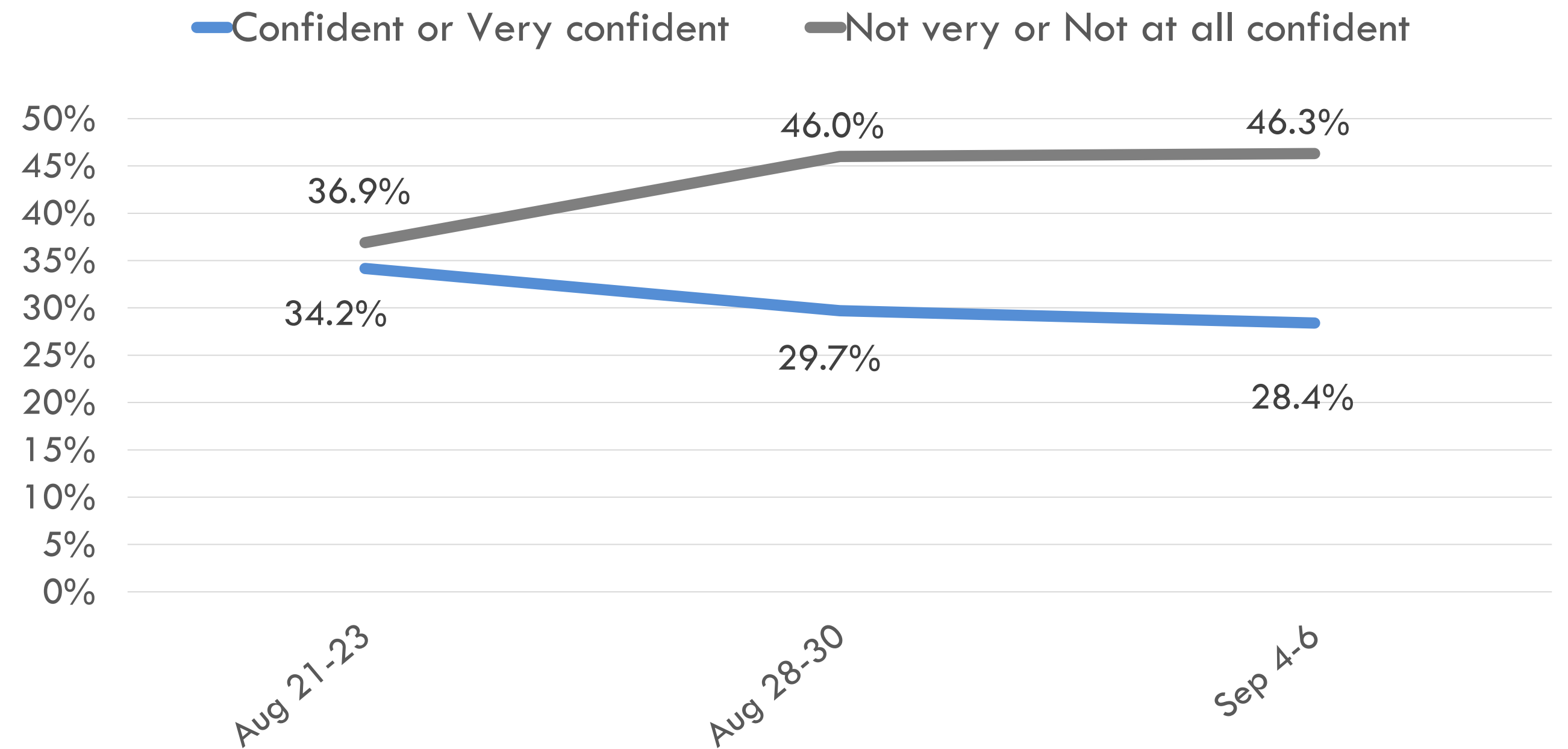


CONFIDENCE IN TRAVELING SAFELY

Question: How confident are you that you can travel safely in the current environment?



(Base: Wave 24-26 data. All respondents, 1,207, 1,250 and 1,225 completed surveys.)





Coronavirus Travel Sentiment Index

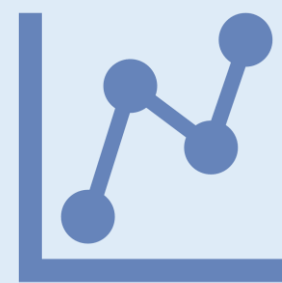
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 7th

What is a Predictive Index?



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



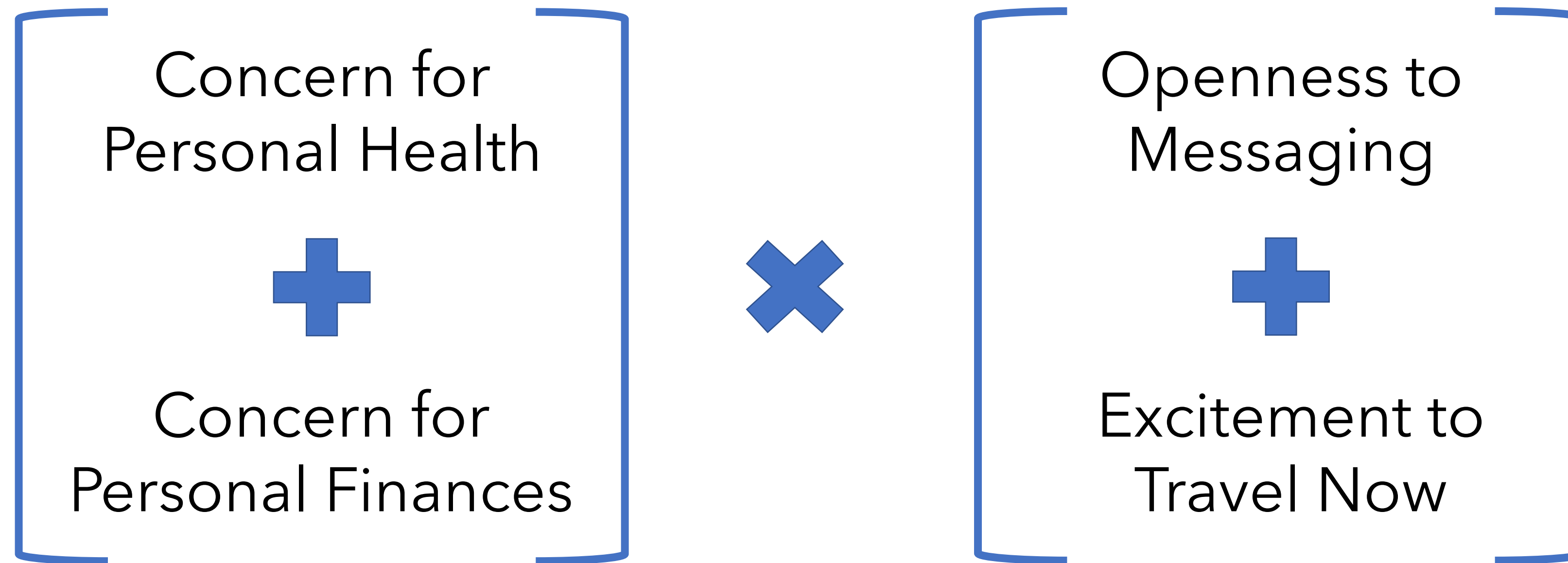
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

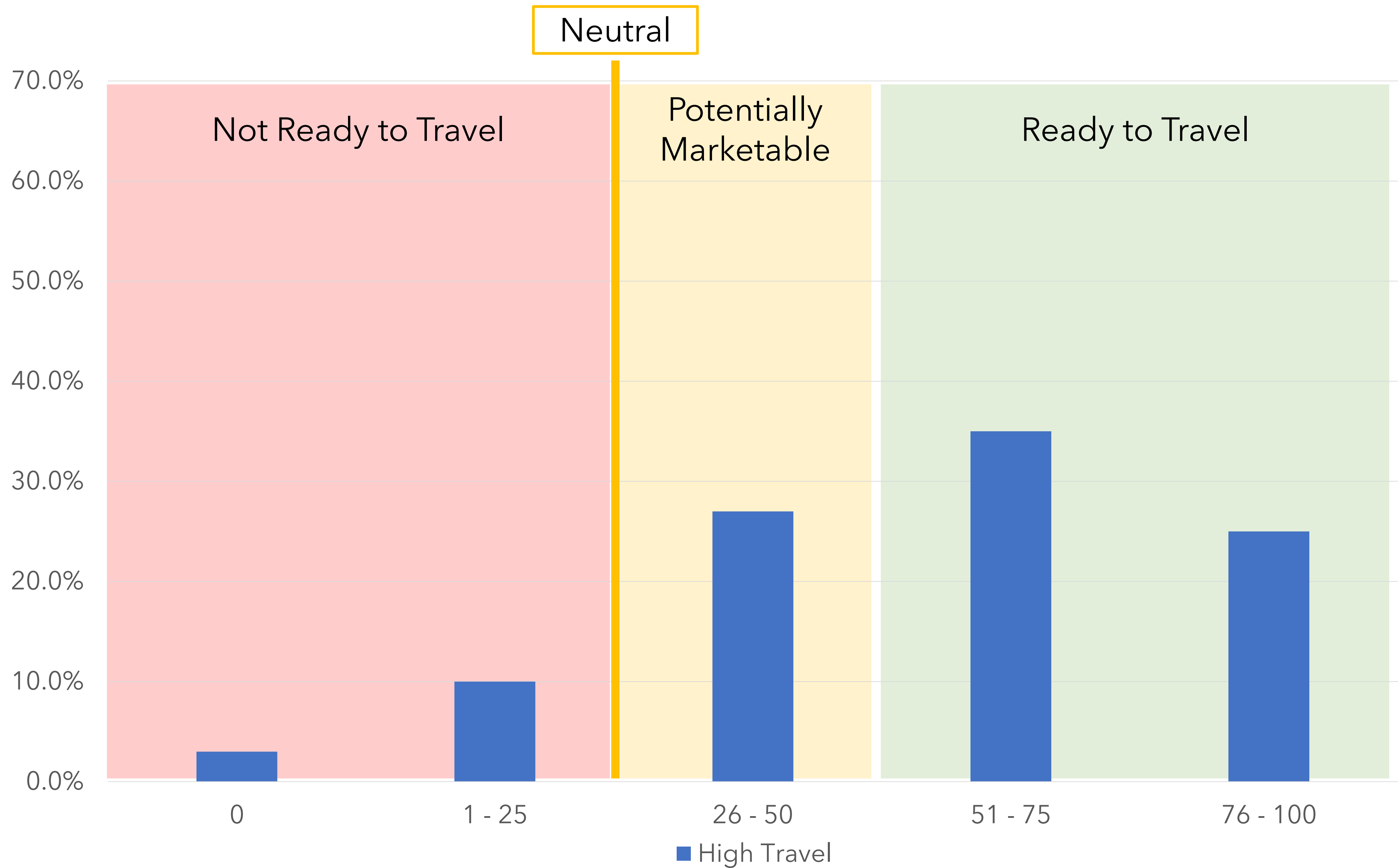
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



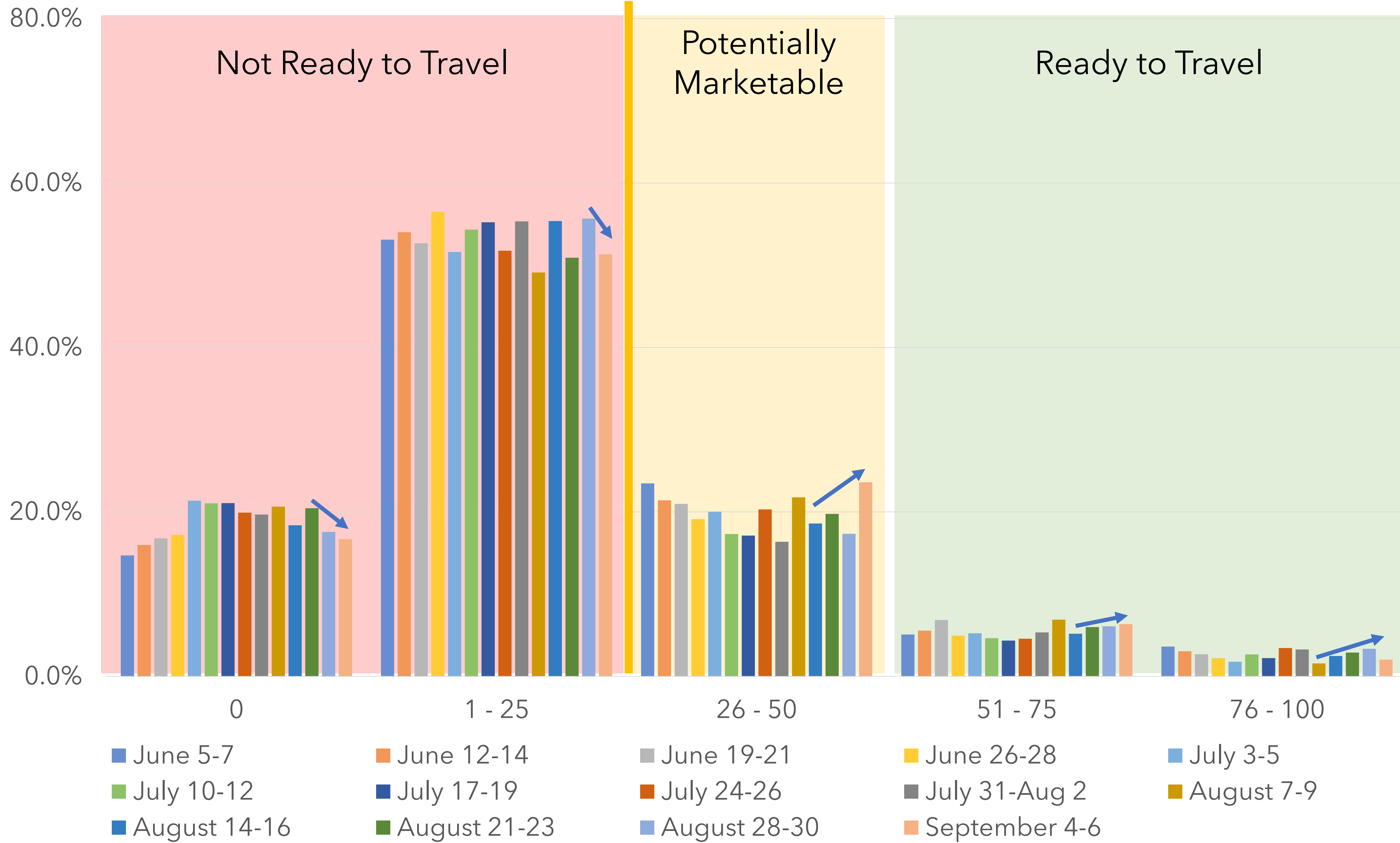
*Normalized to a 100pt scale

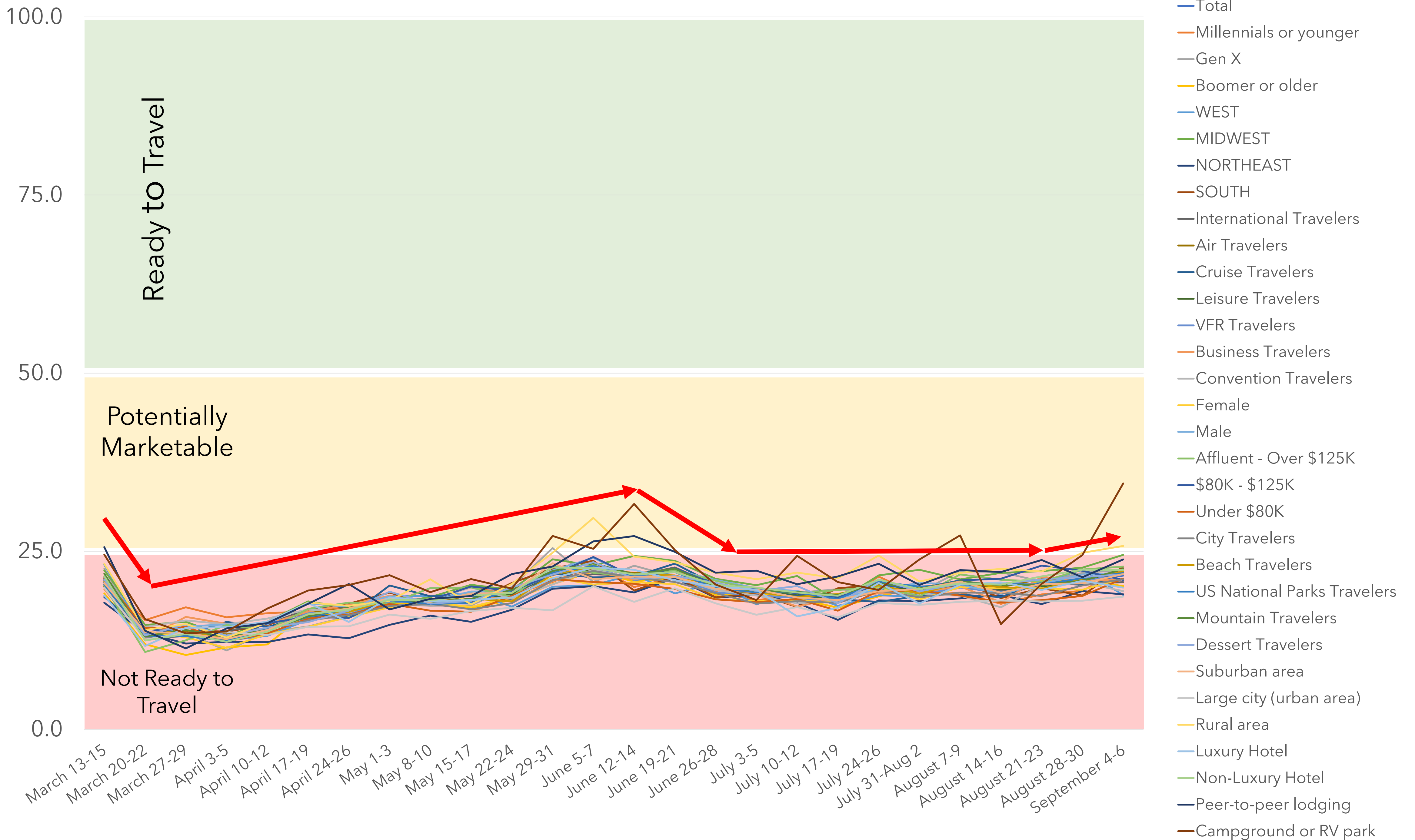
Healthy Travel Outlook



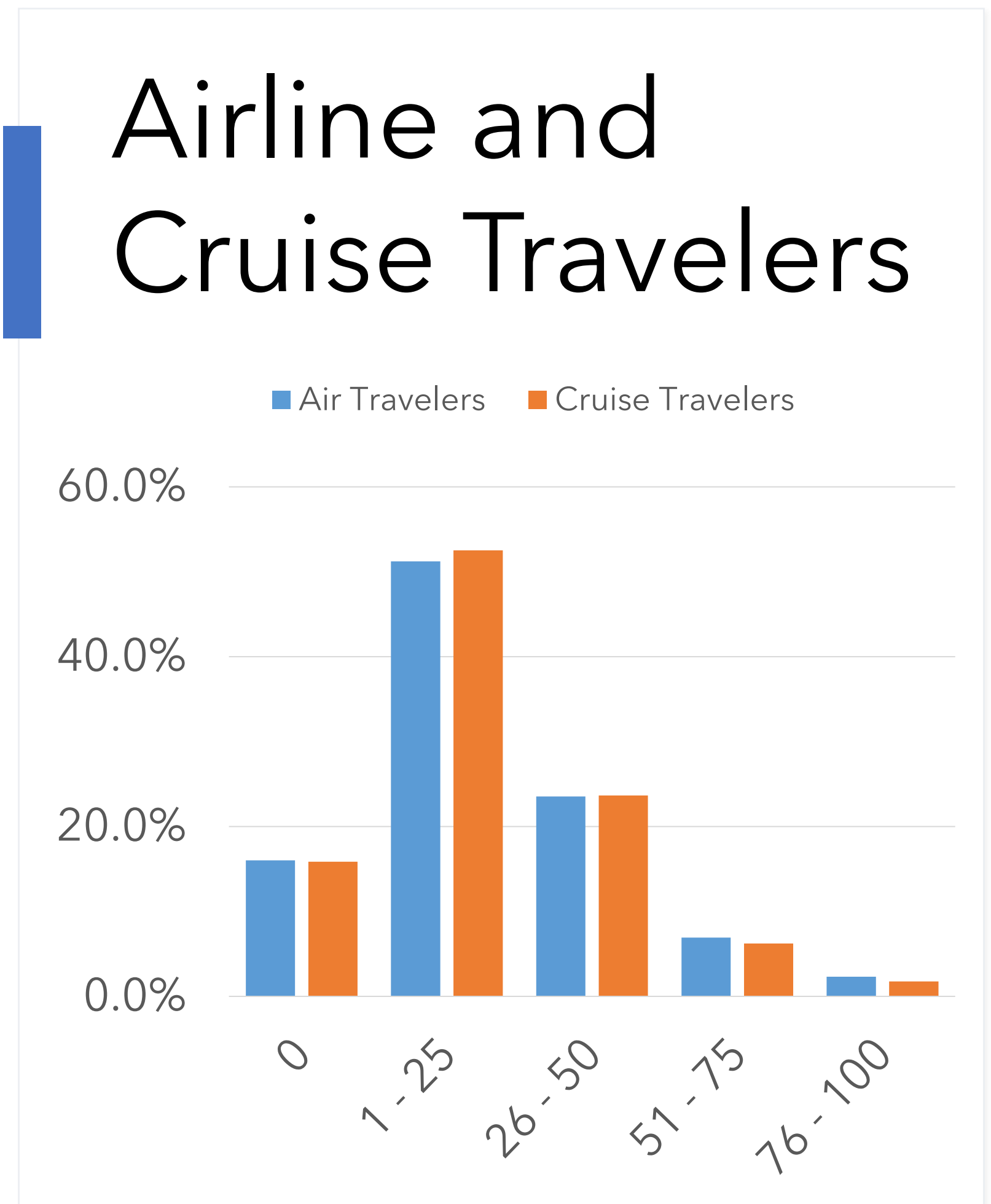
Travel Outlook

Neutral

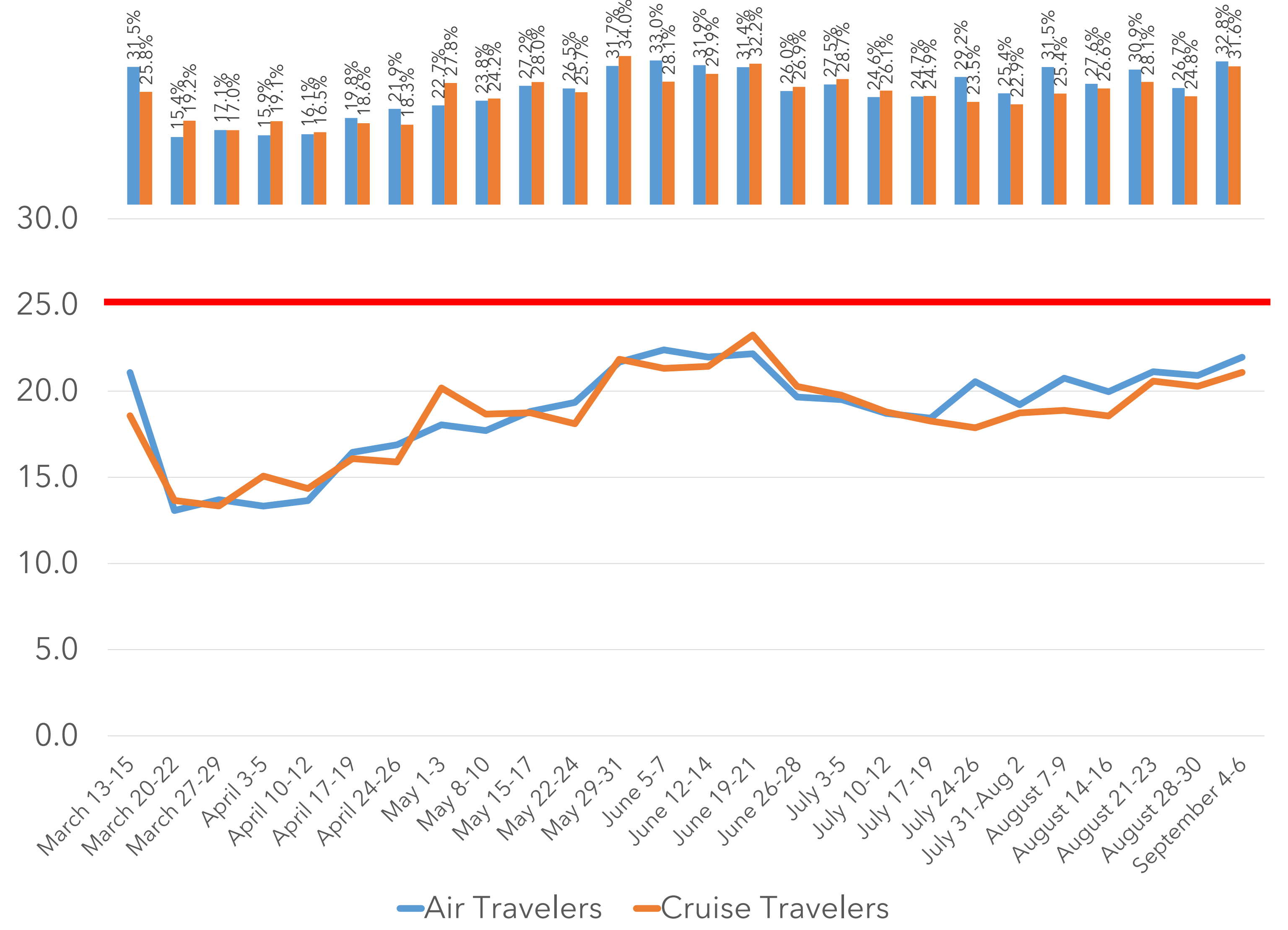




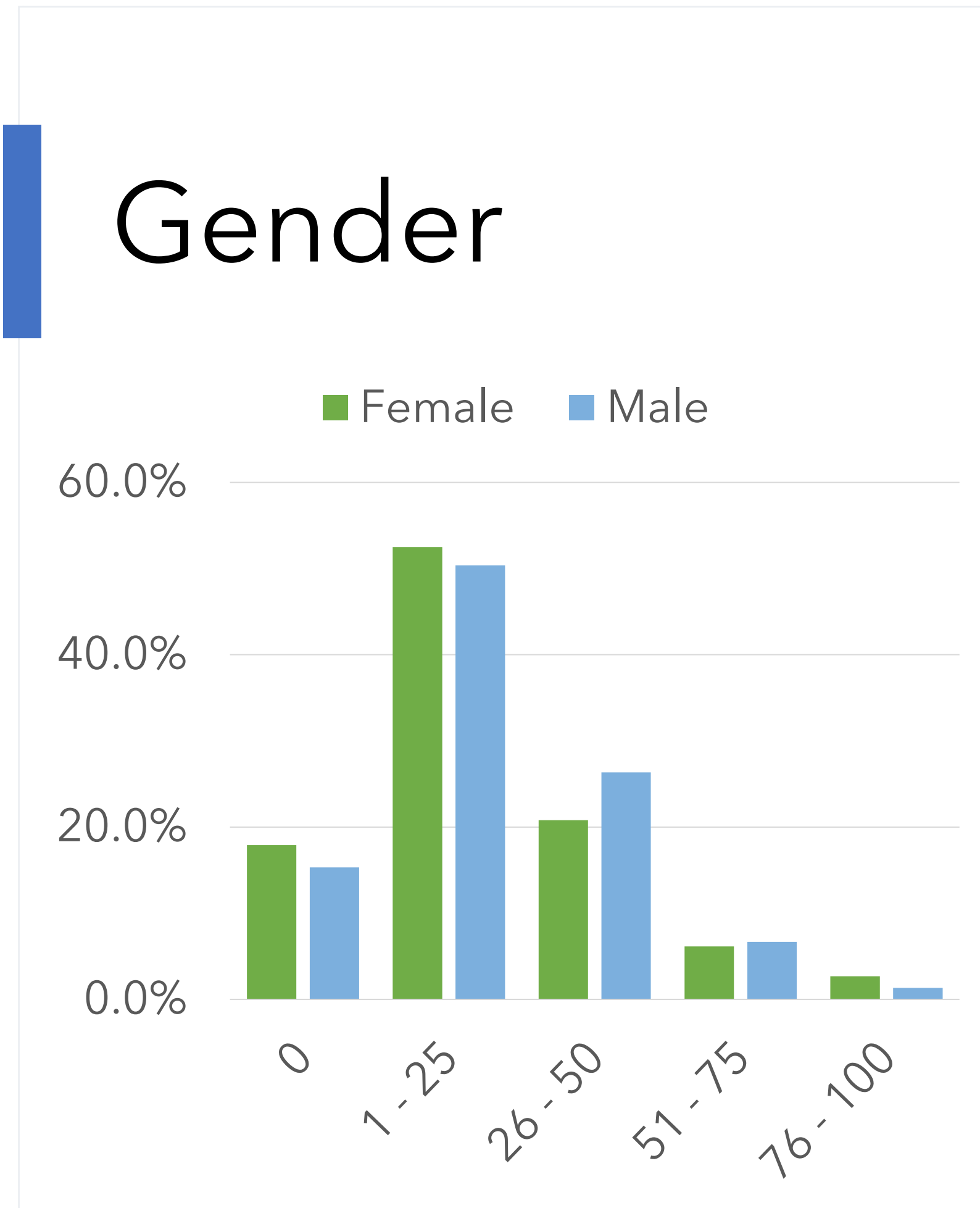
Airline and Cruise Travelers



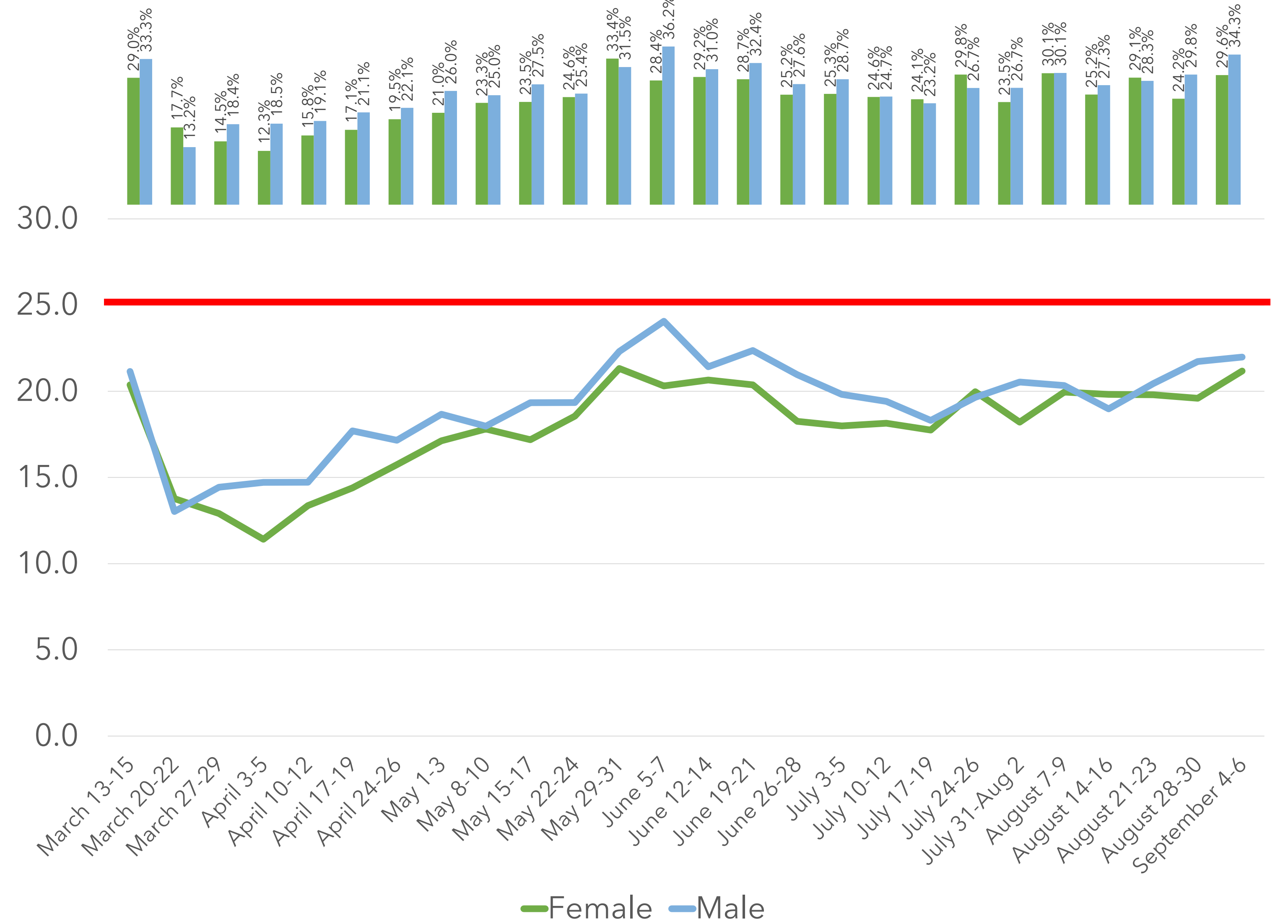
Percent Potentially Marketable (Index Above 25)



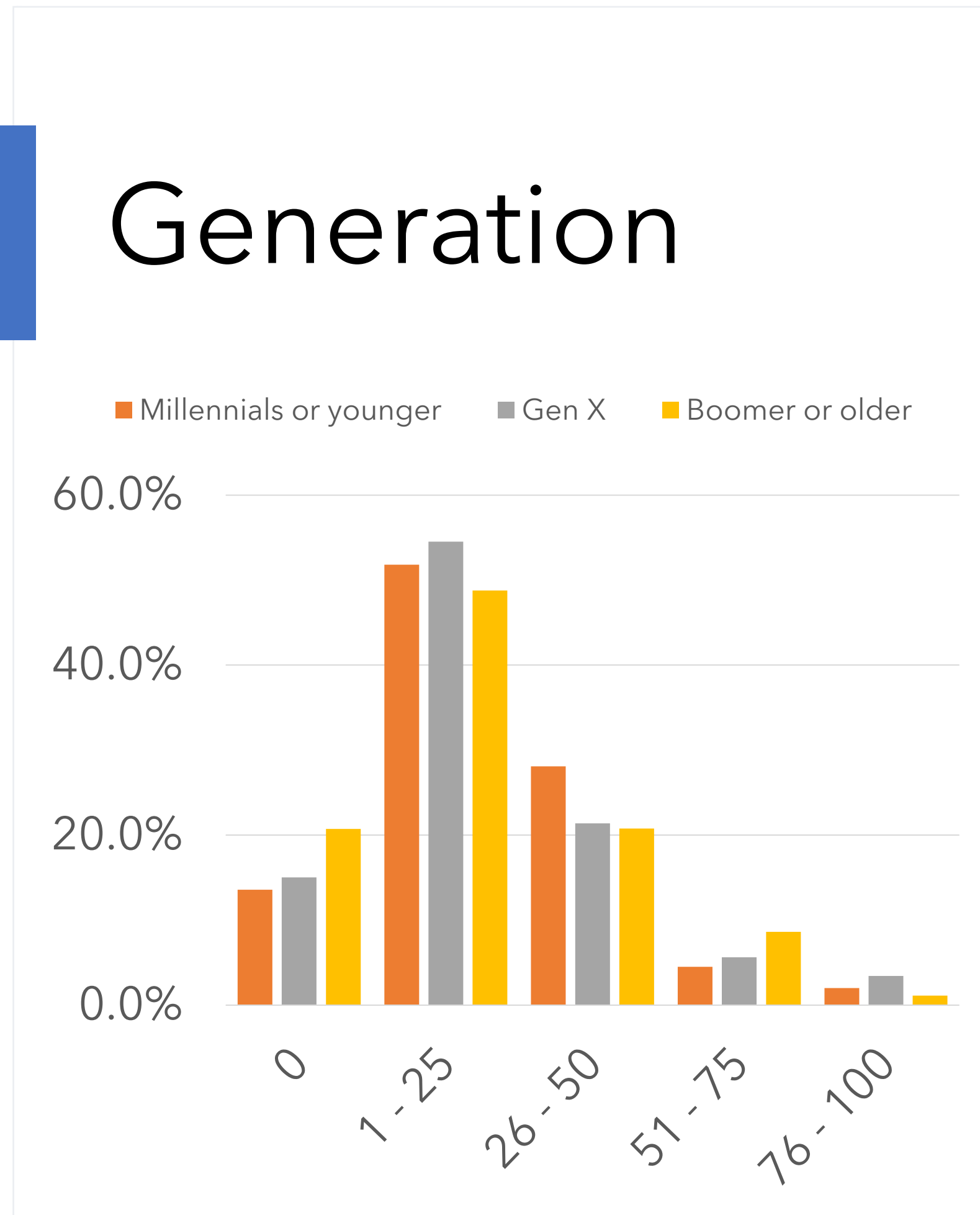
Gender



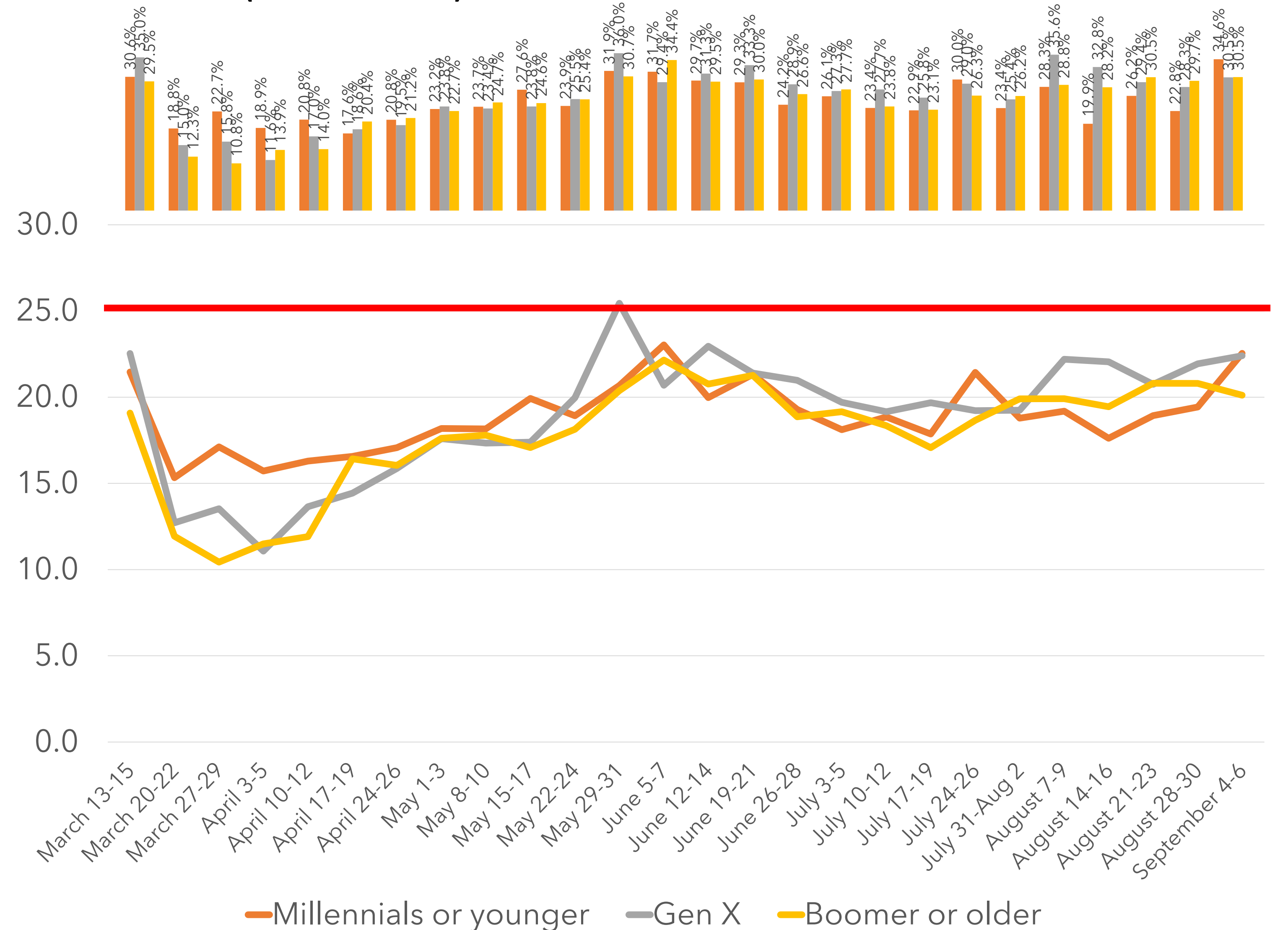
Percent Potentially Marketable (Index Above 25)



Generation

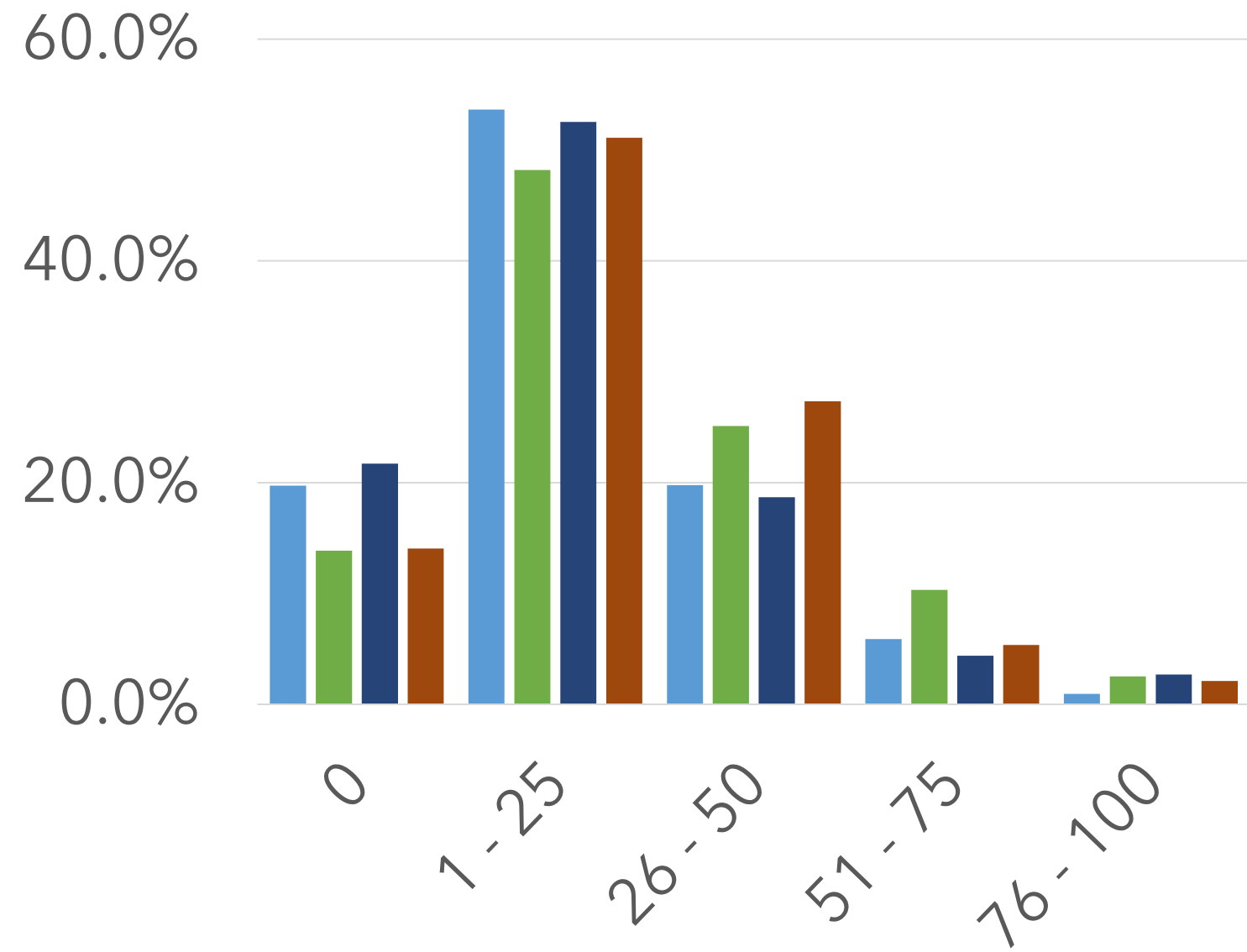


Percent Potentially Marketable (Index Above 25)

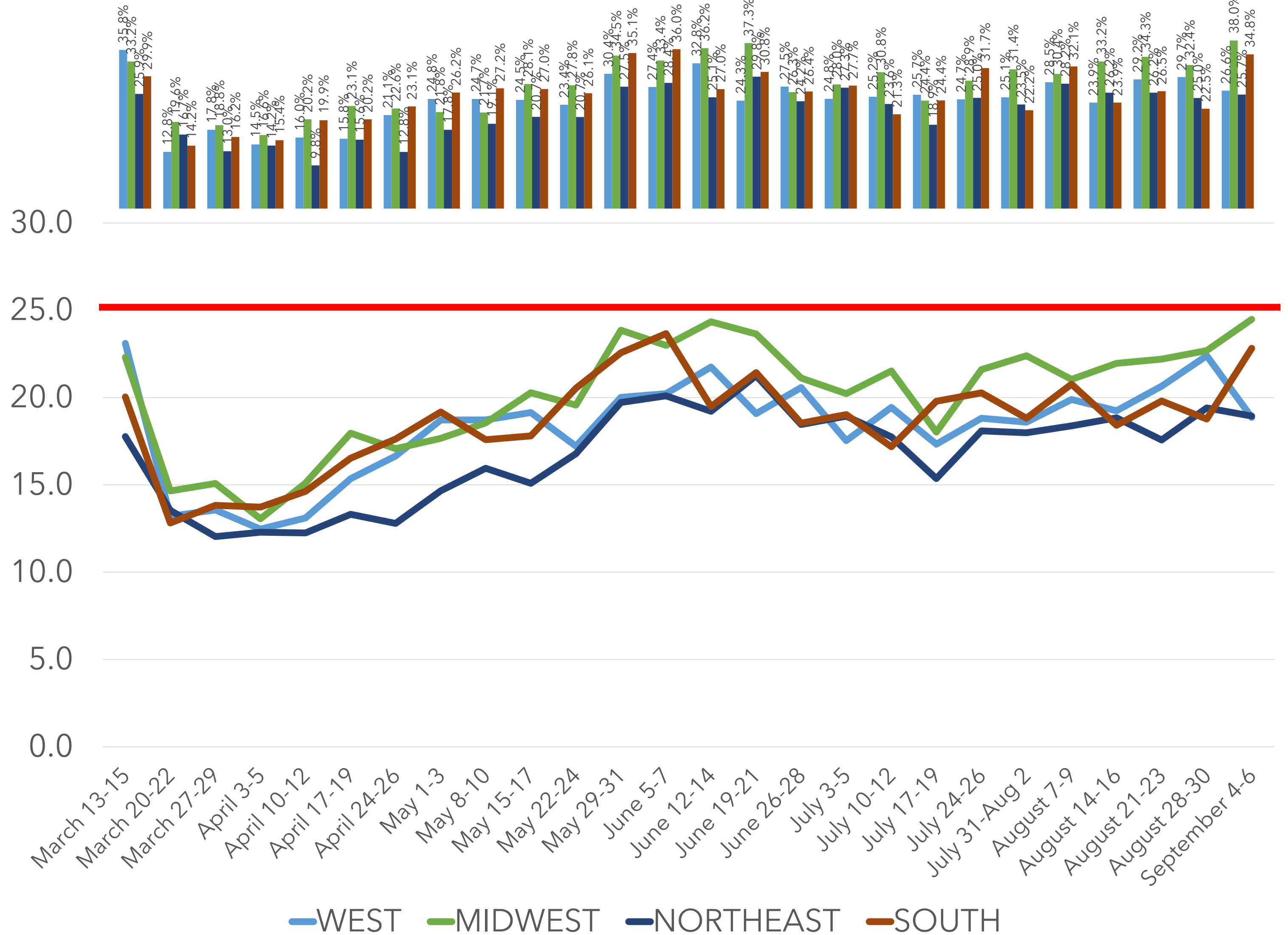


US Regions

WEST MIDWEST NORTHEAST SOUTH



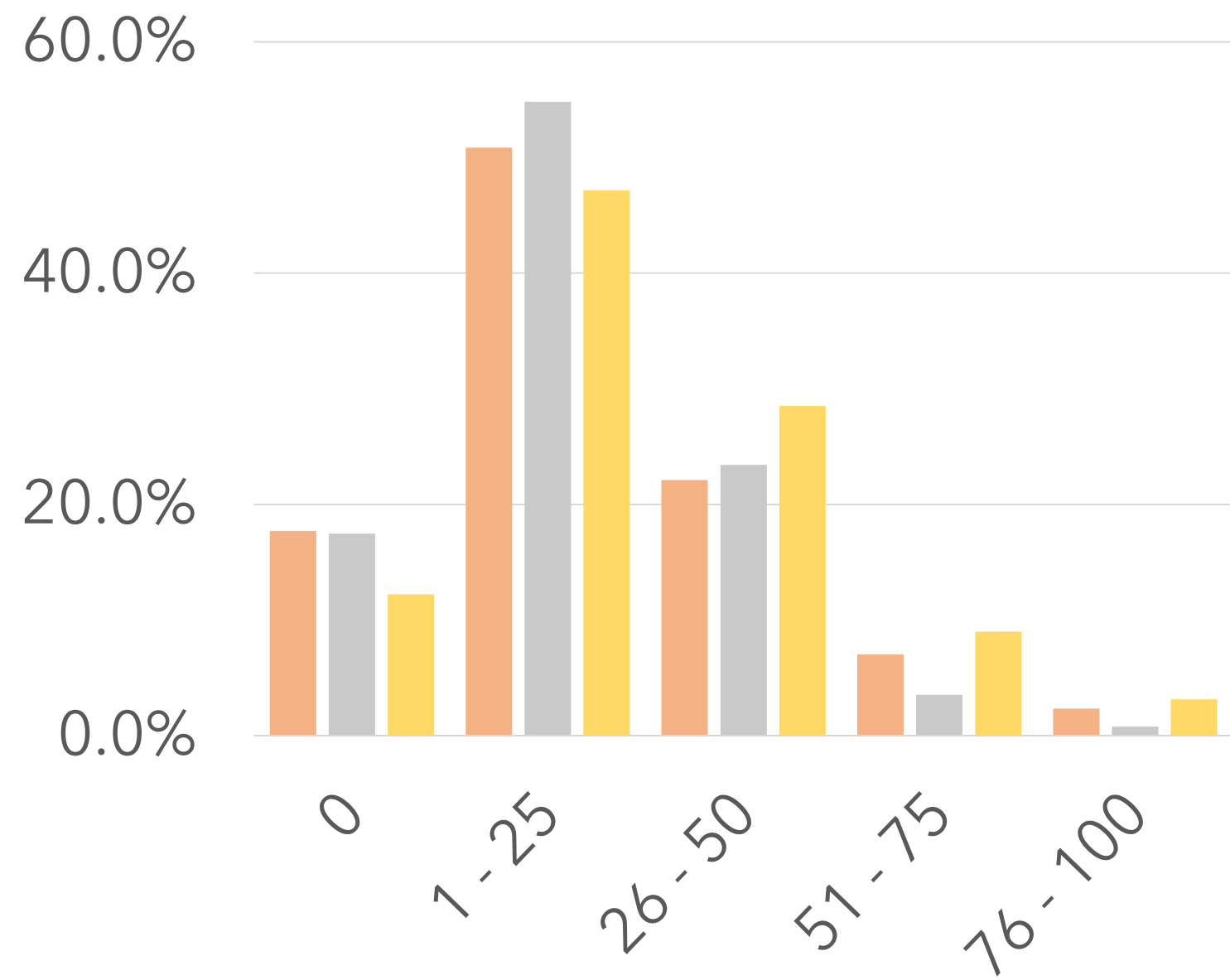
Percent Potentially Marketable (Index Above 25)



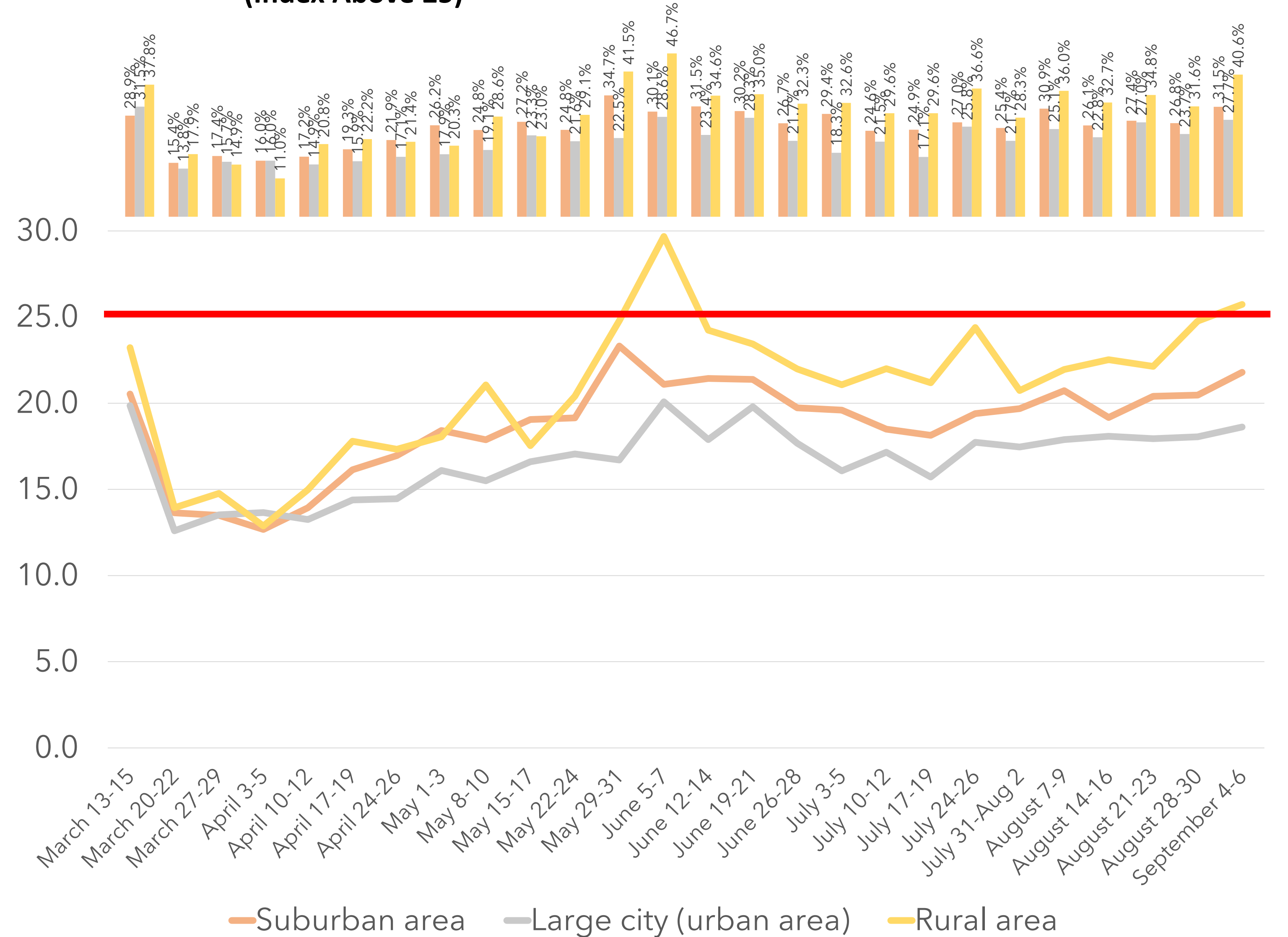
WEST MIDWEST NORTHEAST SOUTH

Residence Type

Suburban area Large city (urban area) Rural area



Percent Potentially Marketable (Index Above 25)



Suburban area Large city (urban area) Rural area

ACCESSING DATA IN THE ONLINE DASHBOARD

08:54:30
VOICE FEED: NETWORK: 12.38.73

Evolution:

SECURITY

Actual vs Target

PROFILE:

PROJECT:

MISSION

ADDRESS:

KPI: Product

FRONT-CAMERA-IP: 143.453.00

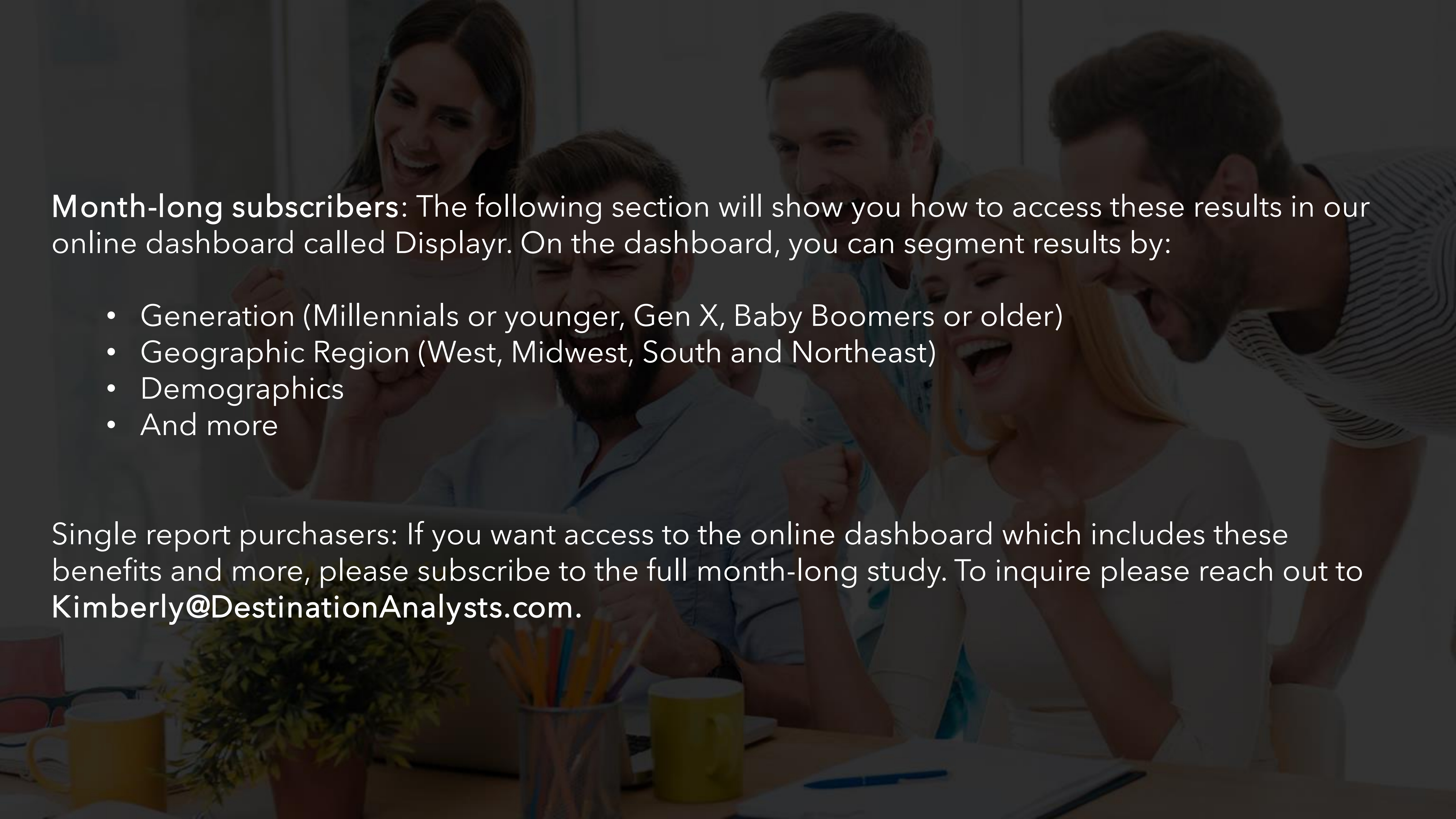
01:43:55

POWER: ON: OFF
TIME-DATE 00:38:29

Customers Satisfaction

CONTROL-AREA





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.



60%

CTMX	0.45	▲	+0.45%
FTR	-0.23	▼	-2.34%
CSCO	-1.01	▼	-1.89%
CHK	0.02	▲	+0.21%
AAPL	+2.58	▲	+3.05%
PRTG	-0.14	▼	-1.42%
AMZN	-0.73	▼	-0.90%
TSLA	+1.08	▲	+5.12%
AVGO	-0.87	▼	-3.88%
SIRI	-0.65	▼	-1.37%

NAVIGATING THE DASHBOARD:

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

The screenshot displays the 'Coronavirus Travel Sentiment Index Report' dashboard. At the top, the title 'Coronavirus Travel Sentiment Index Report' is centered. To the right, there is a search bar with the placeholder text 'Search...', and utility icons for 'Filters', 'Export', a help icon, and a zoom control set to 65%. Below the title, a navigation pane on the left lists three sections: 'Project Overview', 'Topline Findings', and 'Traveler Perceptions and Expectations'. The main content area features a large, detailed 3D rendering of a red coronavirus particle. Overlaid on the right side of this image is a semi-transparent grey box containing the report title, 'Online Dashboard', the date 'Last Updated: 3/16/2020', and the logo for '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.

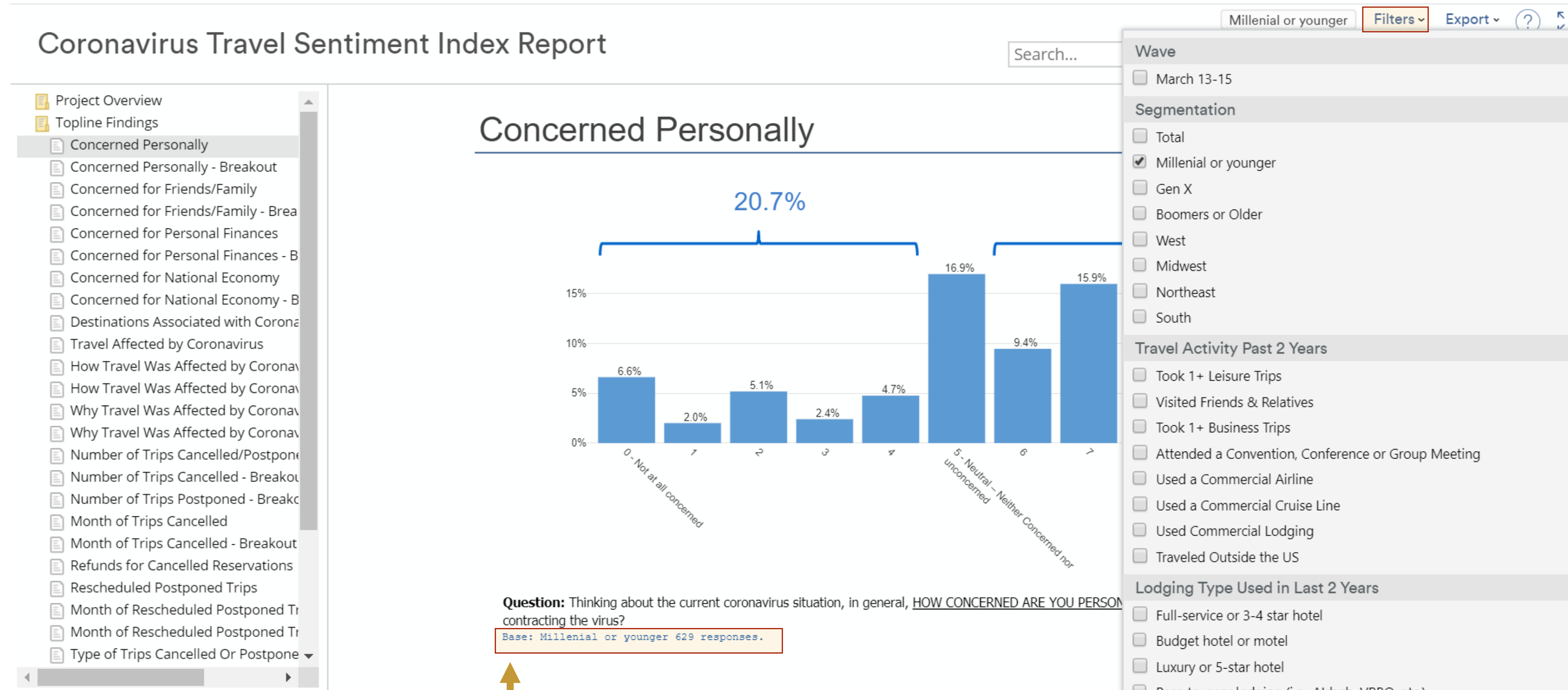
Coronavirus Travel Sentiment Index Report

- 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.



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.

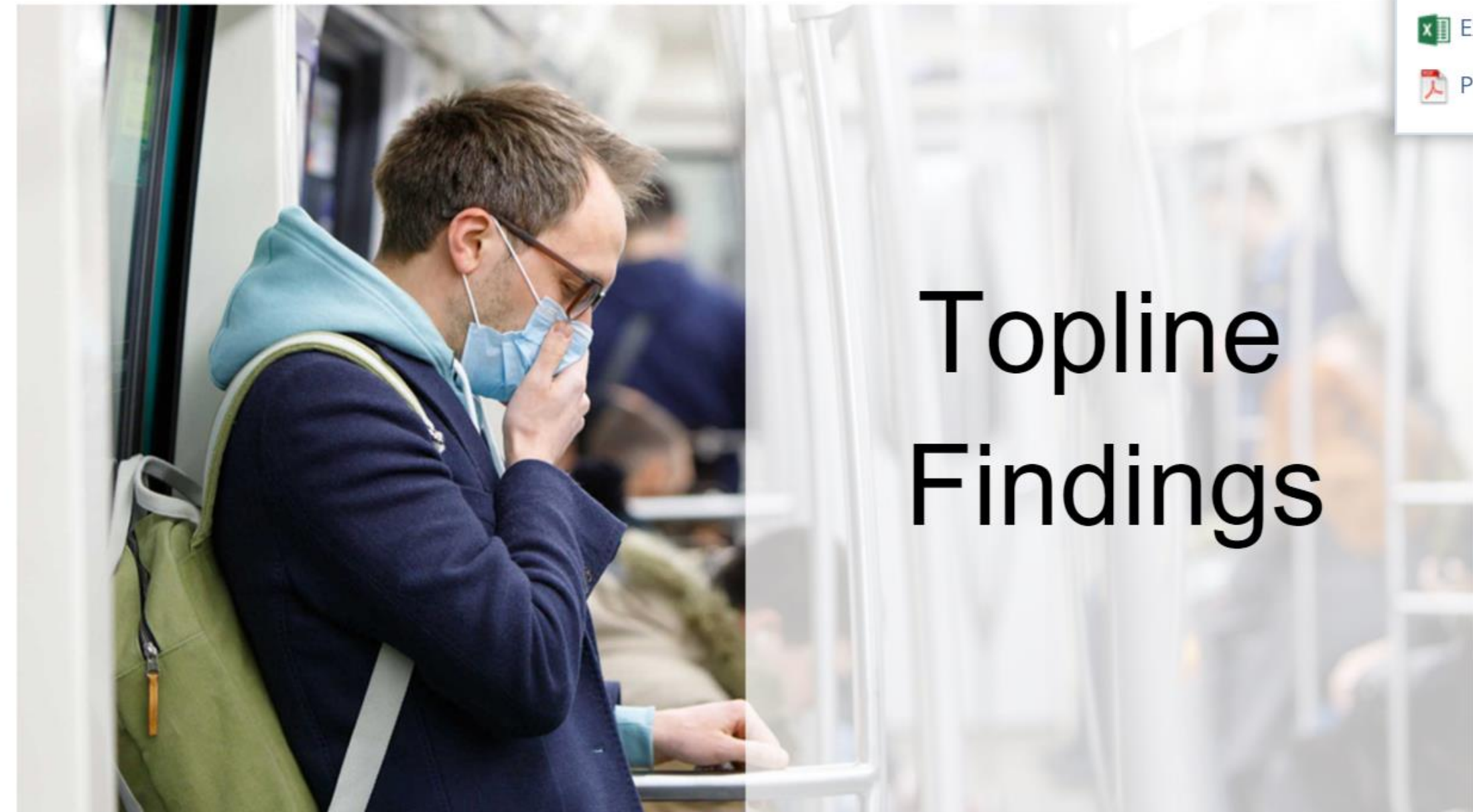
EXPORTING THE DATA:

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 - Brea
 - Concerned for Personal Finances
 - Concerned for Personal Finances - B
 - Concerned for National Economy
 - Concerned for National Economy - B
 - Destinations Associated with Coron
 - Travel Affected by Coronavirus
 - How Travel Was Affected by Coronav
 - How Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Number of Trips Cancelled/Postpone
 - Number of Trips Cancelled - Breakou
 - Number of Trips Postponed - Breakc
 - Month of Trips Cancelled
 - Month of Trips Cancelled - Breakout
 - Refunds for Cancelled Reservations
 - Rescheduled Postponed Trips
 - Month of Rescheduled Postponed Tr
 - Month of Rescheduled Postponed Tr
 - Type of Trips Cancelled Or Postpone



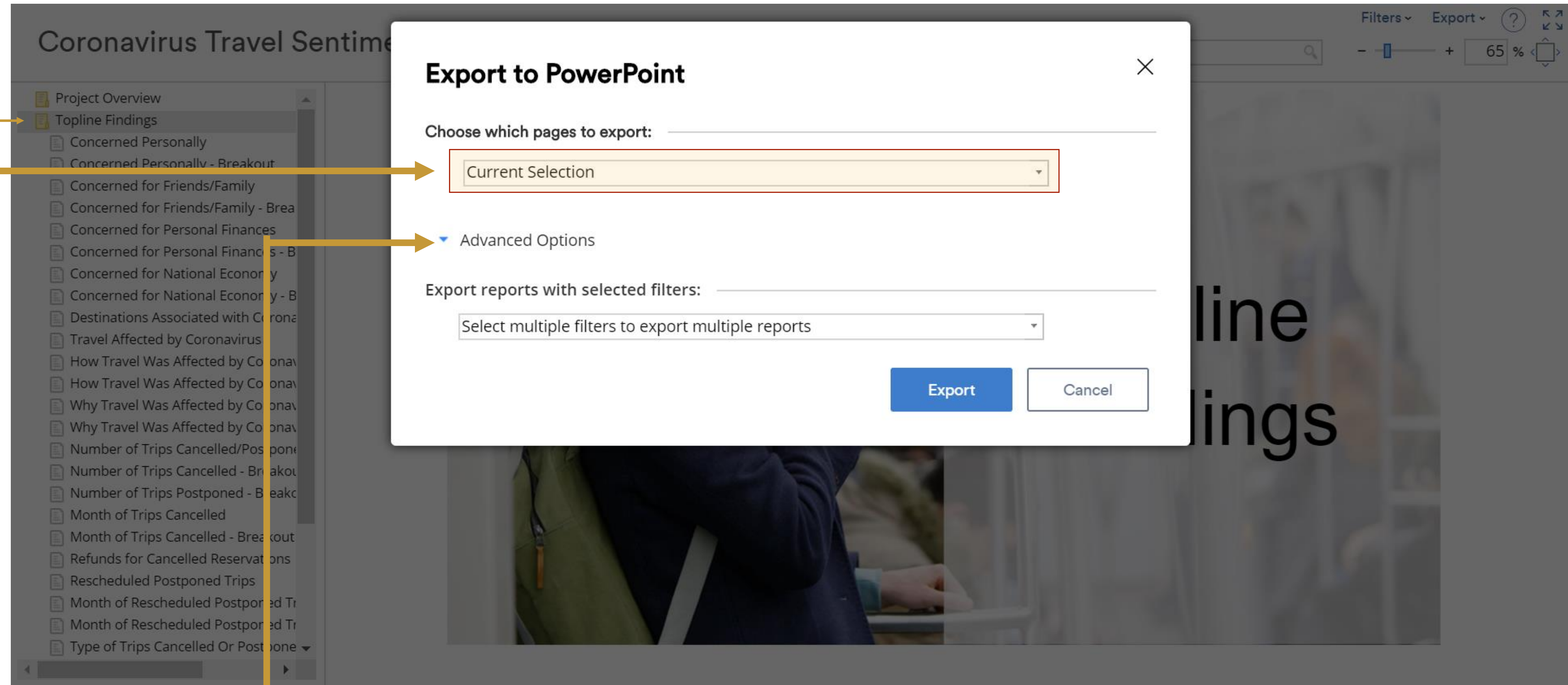
Topline Findings

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

(415) 722-2503

