

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 27

RESEARCH FINDINGS

September 14, 2020

Destination  Analysts

TABLE OF CONTENTS

Destination  Analysts

Project Overview	3
Top Takeaways	5
Current Feelings About the Coronavirus & Travel	8
The Pandemic's Impact on Travel	26
Summer 2020 Travel	36
Summer 2020 Staycations	63
Opinions on Travel & the Coronavirus	70
Coronavirus Travel Sentiment Index	89
Accessing Data in the Online Dashboard	101

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 27th 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 27th wave of this survey was collected from September 11th - 13th, 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, 1,205 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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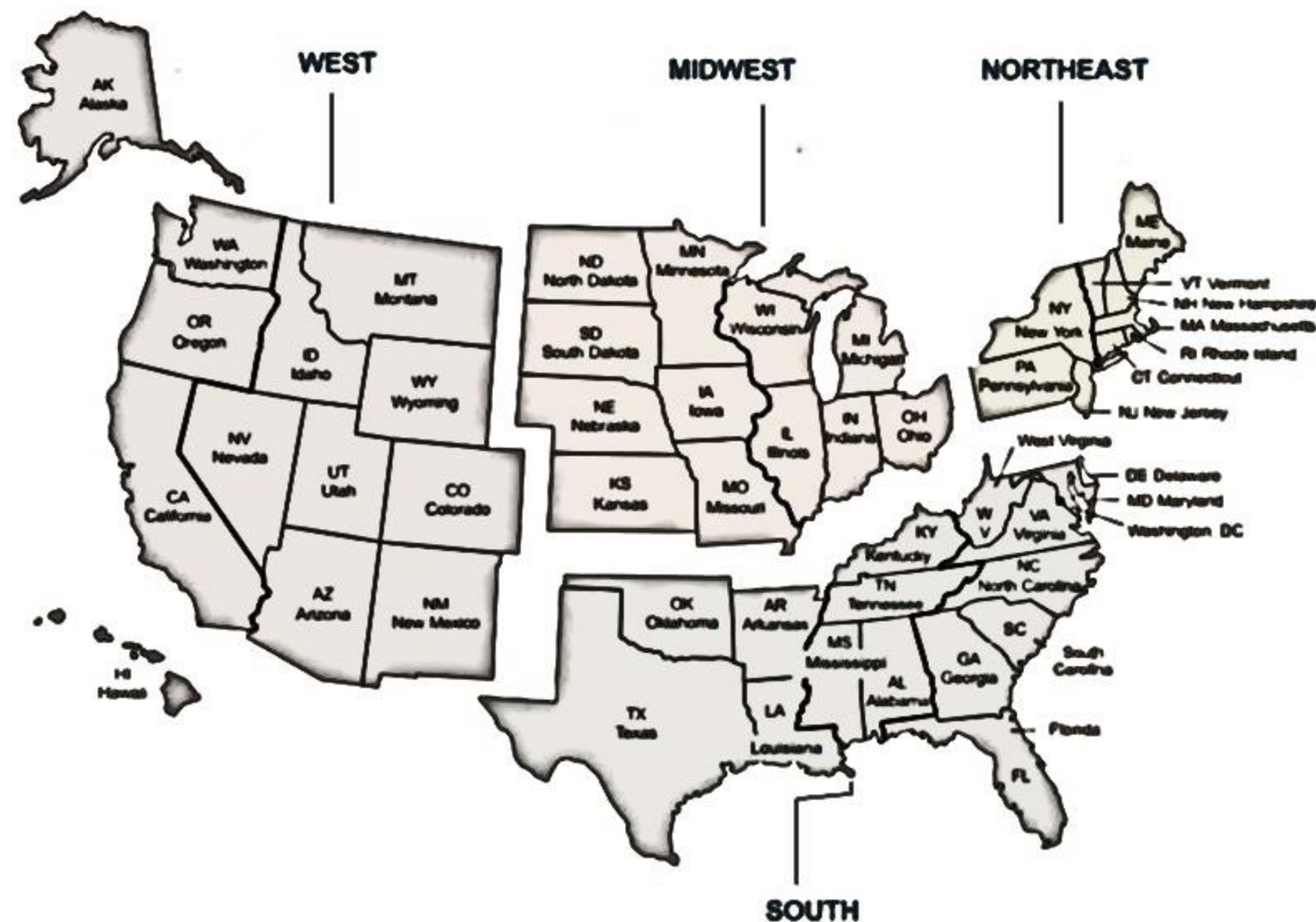


PROJECT OVERVIEW

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 27 of this weekly consumer traveler sentiment tracking study.

- **Pessimism still outweighs optimism about the pandemic's course in America, but has stabilized over the last three weeks.** Health concerns, while strong, remain the lowest they have been during the pandemic. And while we can't shake our highly elevated fears of the virus' impact on the national economy, concerns about the virus' impact on personal finances are their lowest level since the pandemic began. This lessening of fear has translated to travel. The average rating of travel activities as "unsafe" continued to fall this week to the lowest levels they have been since March 15. Over 30.0% of American travelers are confident they can travel safely in the current environment, another 24.0% feel at least somewhat confident.
- **There has been a measured rise in the number of American travelers who are planning travel: this week, 78.3% report they have at least tentative trip plans—up from 75% last week.** In fact, 37.0% now agree they will be traveling this Fall season—up 5% from last week and returning to mid-June levels. Excitement to travel in the near-term and openness to inspiration continue to grow. Those in a "ready to travel" mindset is at a pandemic-period high.



TOP TAKEAWAYS

- **Nevertheless, in continuing to learn from the experiences of those who traveled during the pandemic summer, there is opportunity for the travel industry to work together to improve safety perceptions around travel**—especially since the taking of trips inspires more confidence travel can be done safely. Among those who traveled by commercial airline this past summer, 52.8% report feeling unsafe against COVID-19 at some point(s) during their flight. Such feelings were not as widespread while at lodging properties, but still 27.7% report feeling unsafe against the virus sometime during their stay. Summer travelers most commonly saw masked and gloved employees, floor markings and other encouragements for social distancing at the lodging properties they stayed at this summer, however there was less observation of some of the top protocols travelers expressed they wanted lodging properties to adopt in the wake of COVID-19, such as providing guests with well-explained cleanliness protocols, masks, wipes and sanitizer.
- **While it is a positive sign for the travel industry that well over a third of American travelers took trips this past summer, the pandemic did appear to mute the economic impact potential of this travel.** Trip activities seemed more limited or favoring free. Over 56.0% of these travelers said they decreased their spending on these trips to some degree, and 42.3% said they were more budget conscious.

TOP TAKEAWAYS

- **One-in-five American travelers report taking a staycation this summer, primarily because of COVID-19 concerns (57.2%) rather than an affinity for them (27.0%) or budget reasons (25.7%).** While over 60 percent said the staycation was mainly staying at home, two-thirds report doing at least one activity, such as day trips to area attractions (28.0%) and going to restaurants (26.5%).
- **When it comes to a COVID-19 vaccine—at least one that is developed within the next several months—44.1% of American travelers said they would take it, although for the majority, some waiting period is preferred. Those who are currently less ready to travel are more willing to take the vaccine (49.7%).**

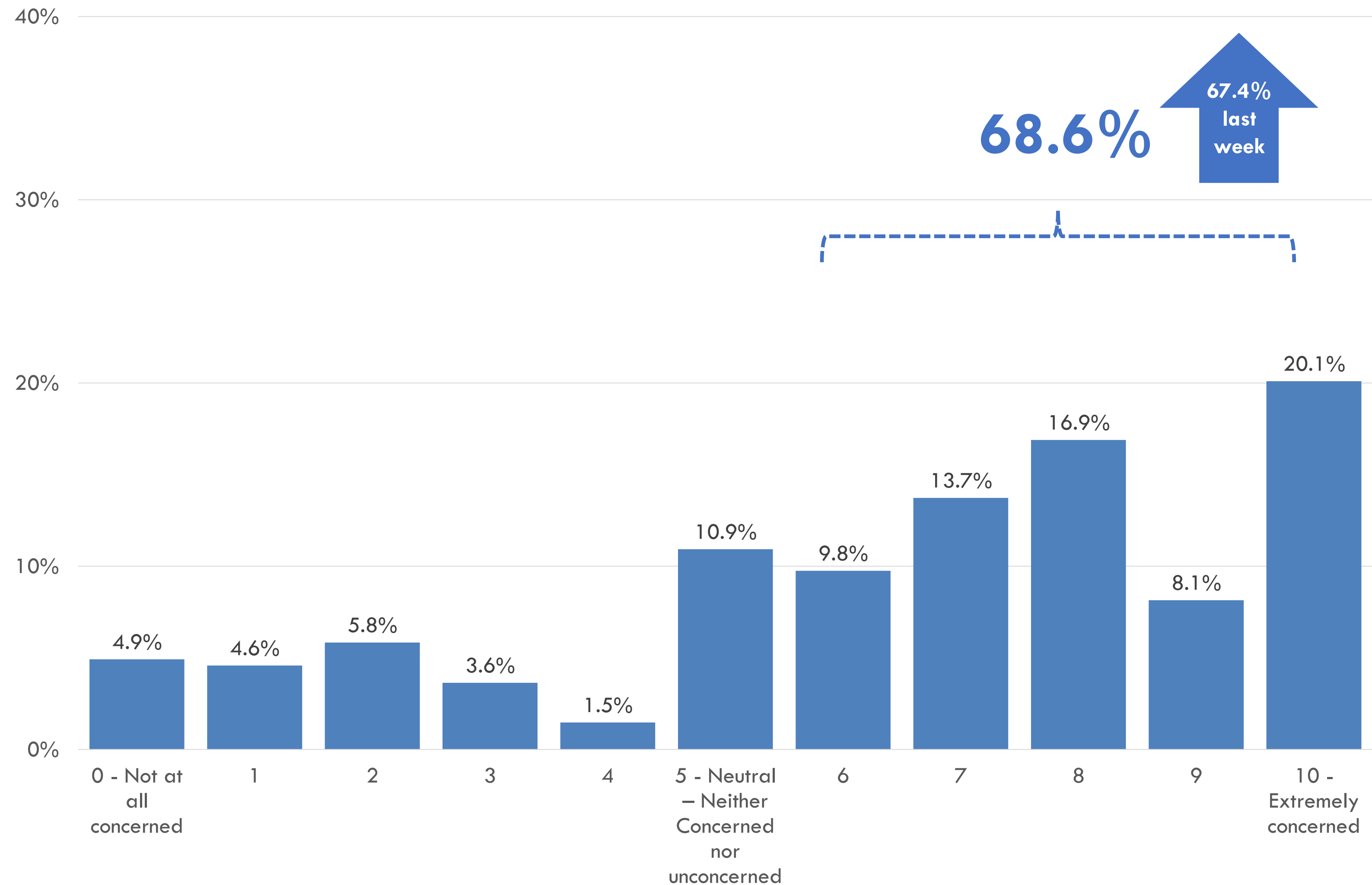
A woman wearing a face mask and a long coat stands in an airport terminal with a yellow suitcase. The background shows airport check-in counters and a red stanchion with a retractable belt. The overall scene is dimly lit, suggesting an indoor airport environment.

CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL

PERSONAL HEALTH CONCERNS

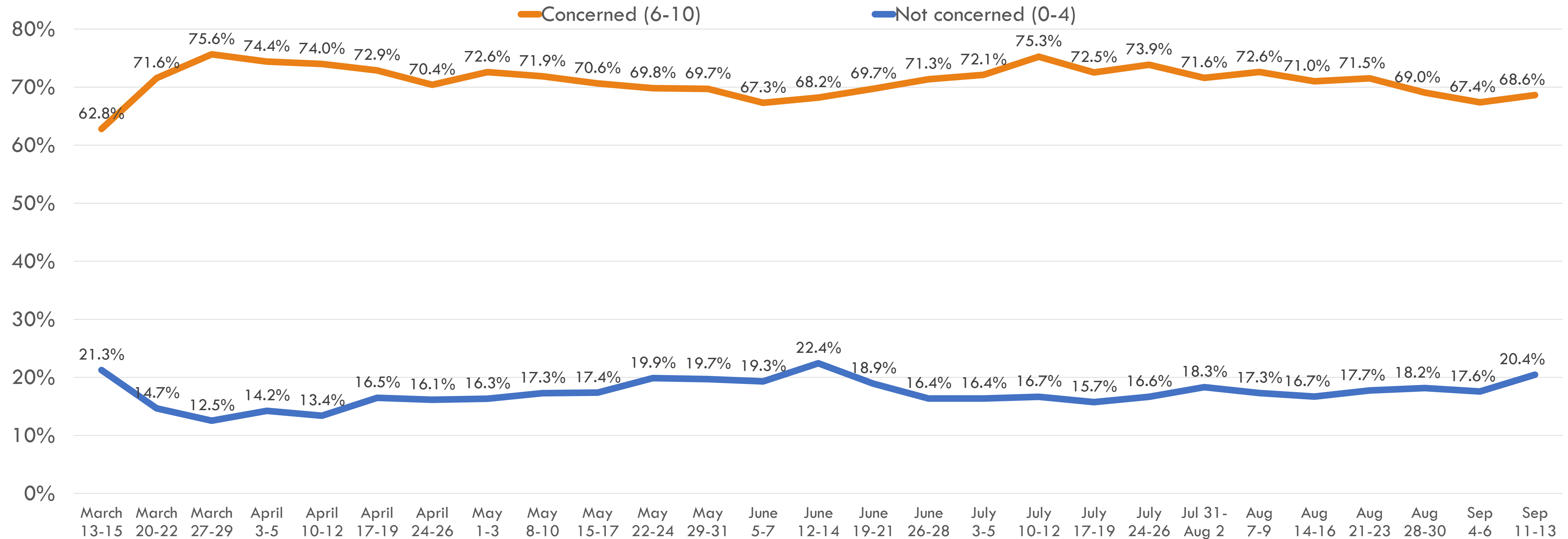
Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)

(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



PERSONAL HEALTH CONCERNS (WAVES 1-27)

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

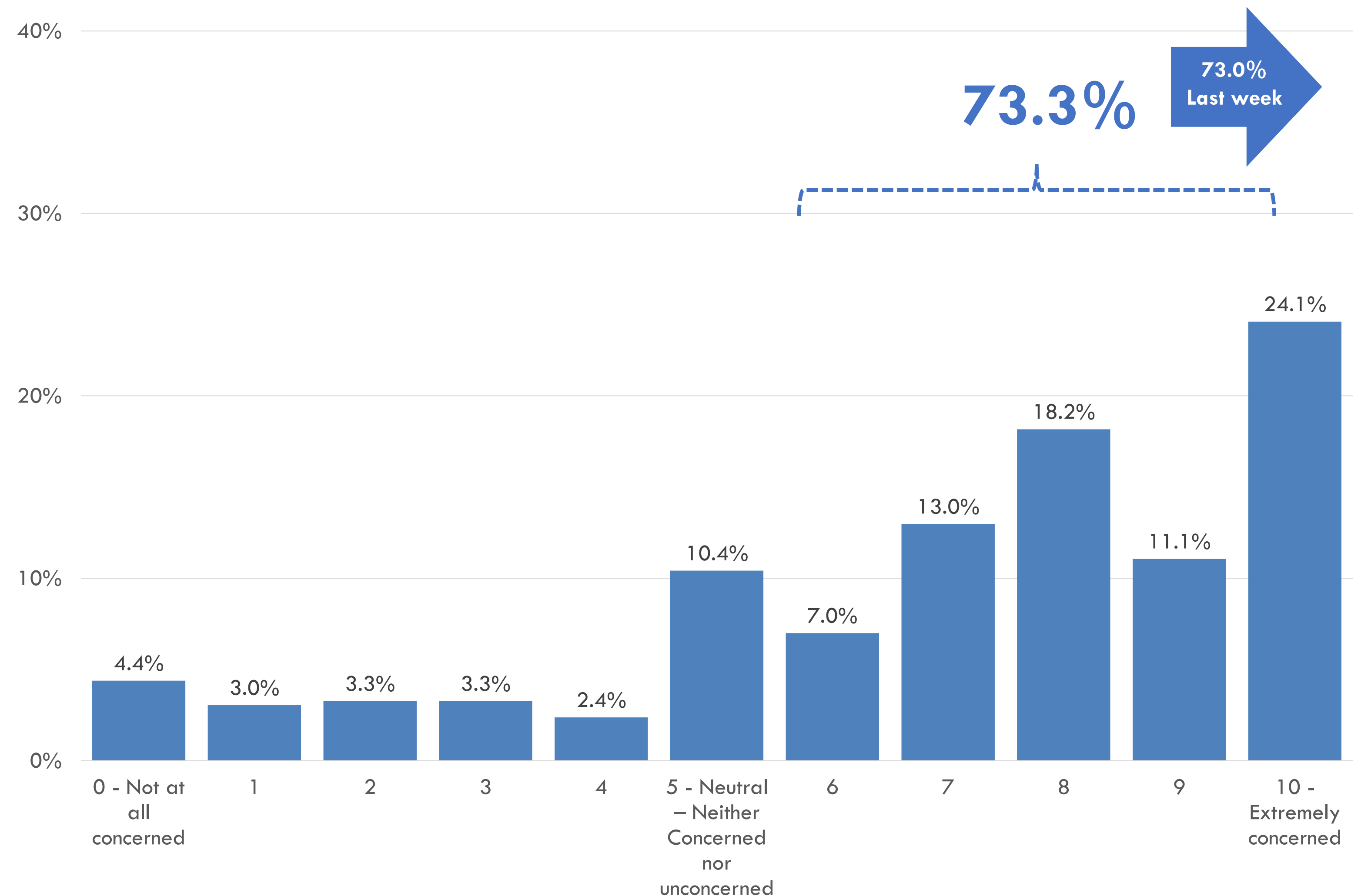


(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

HEALTH CONCERNS (FAMILY & FRIENDS)

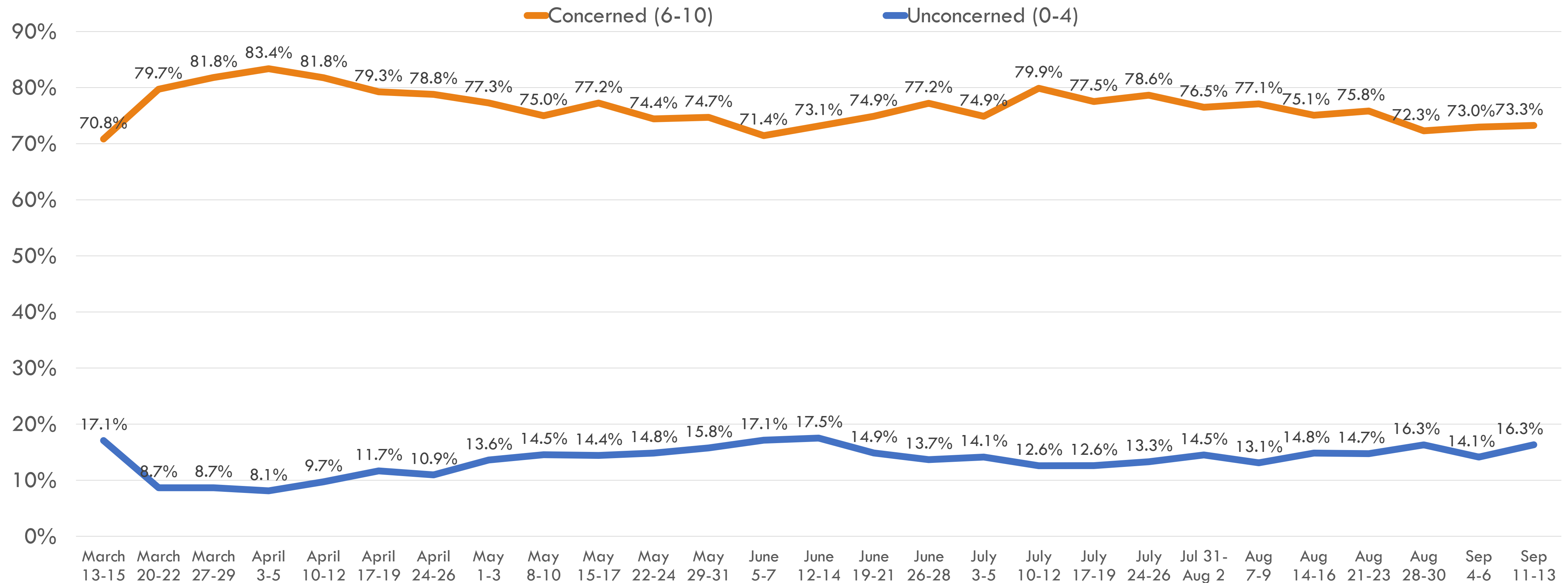
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-27)

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)

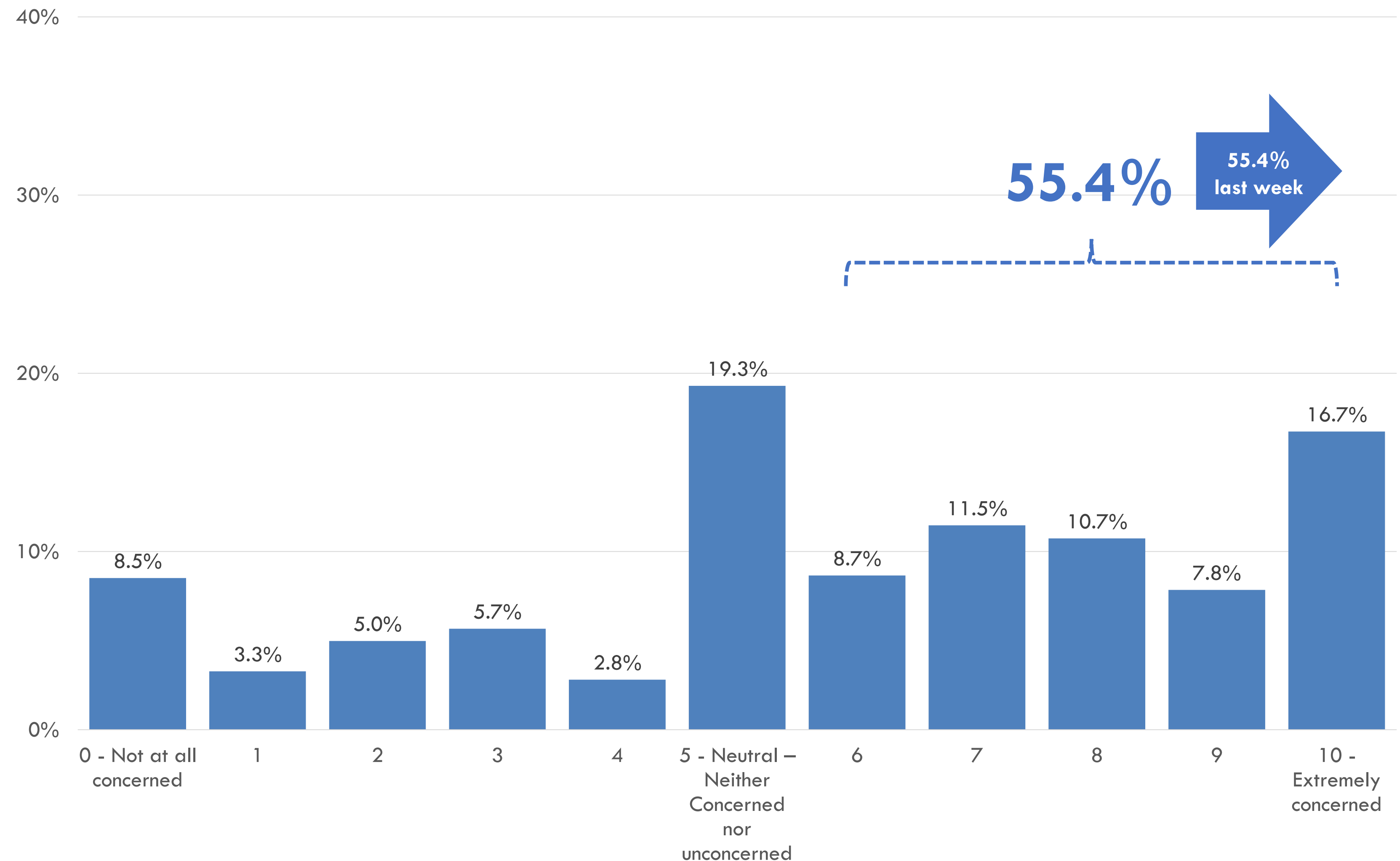


(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

CONCERNS ABOUT PERSONAL FINANCES

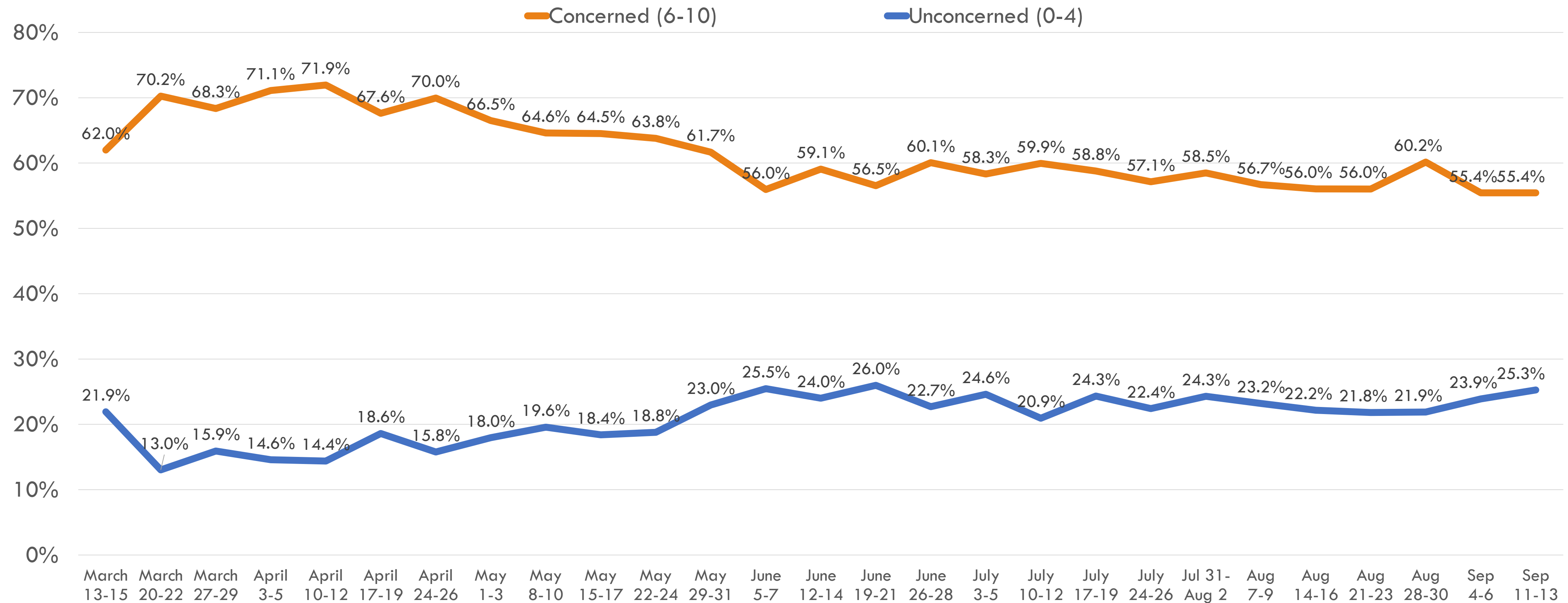
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-27)

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)

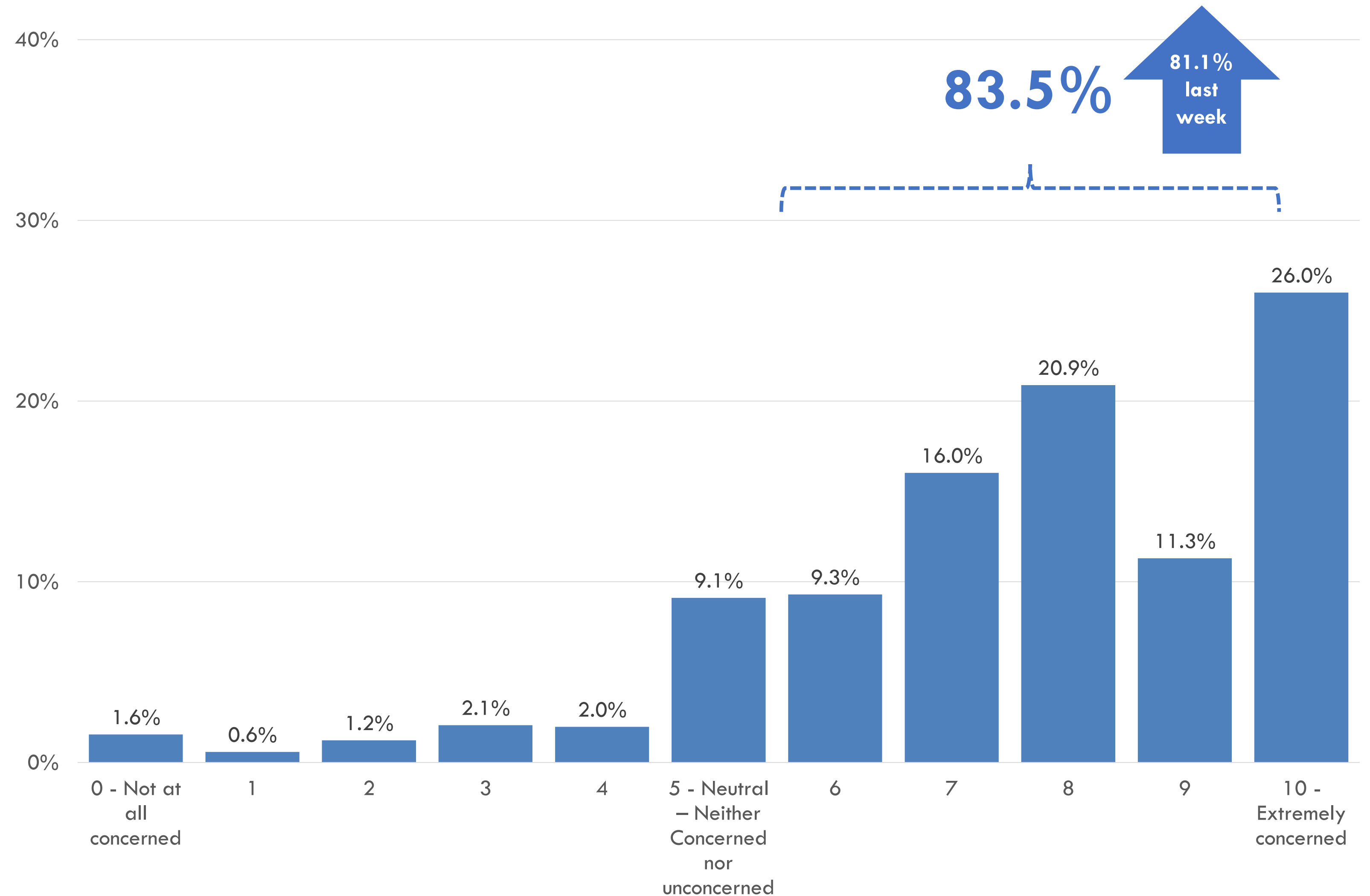


(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

CONCERNS ABOUT NATIONAL ECONOMY

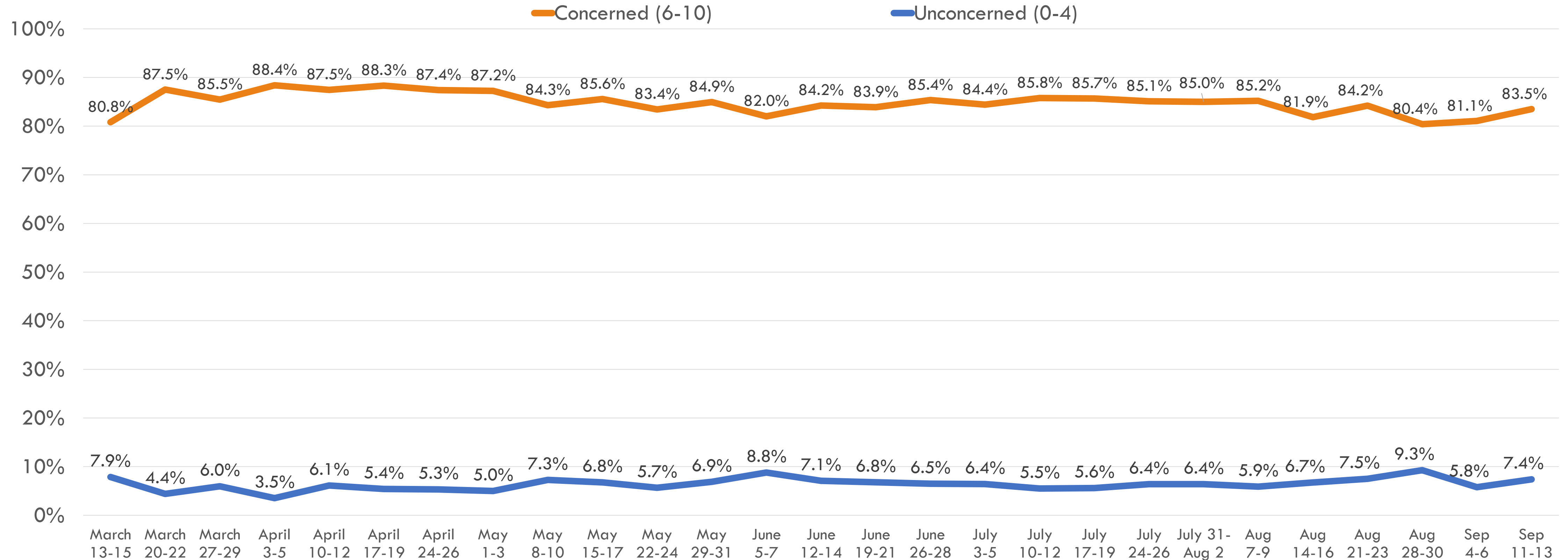
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-27)

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



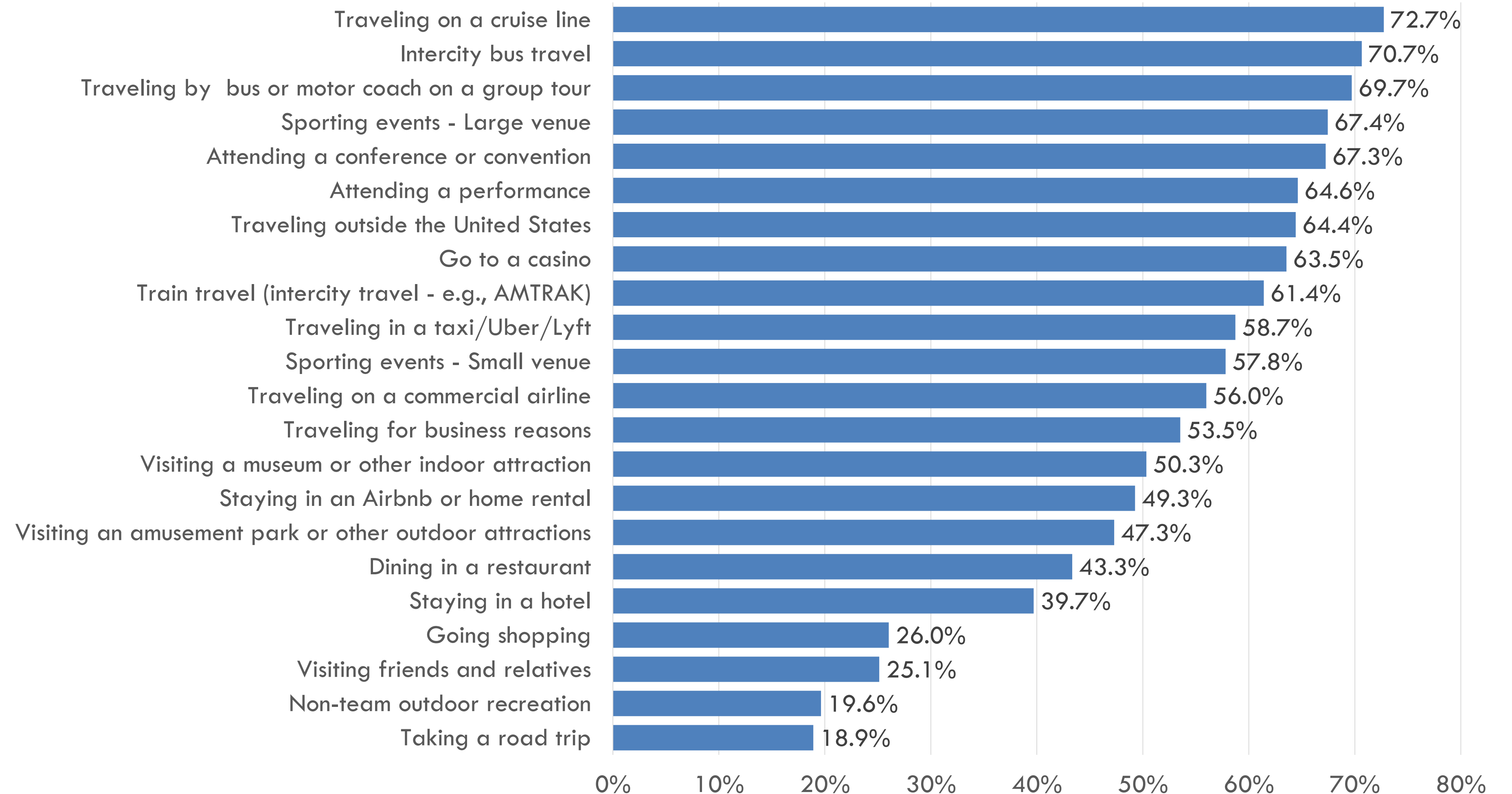
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 27)

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

(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected Sept 11-13, 2020)

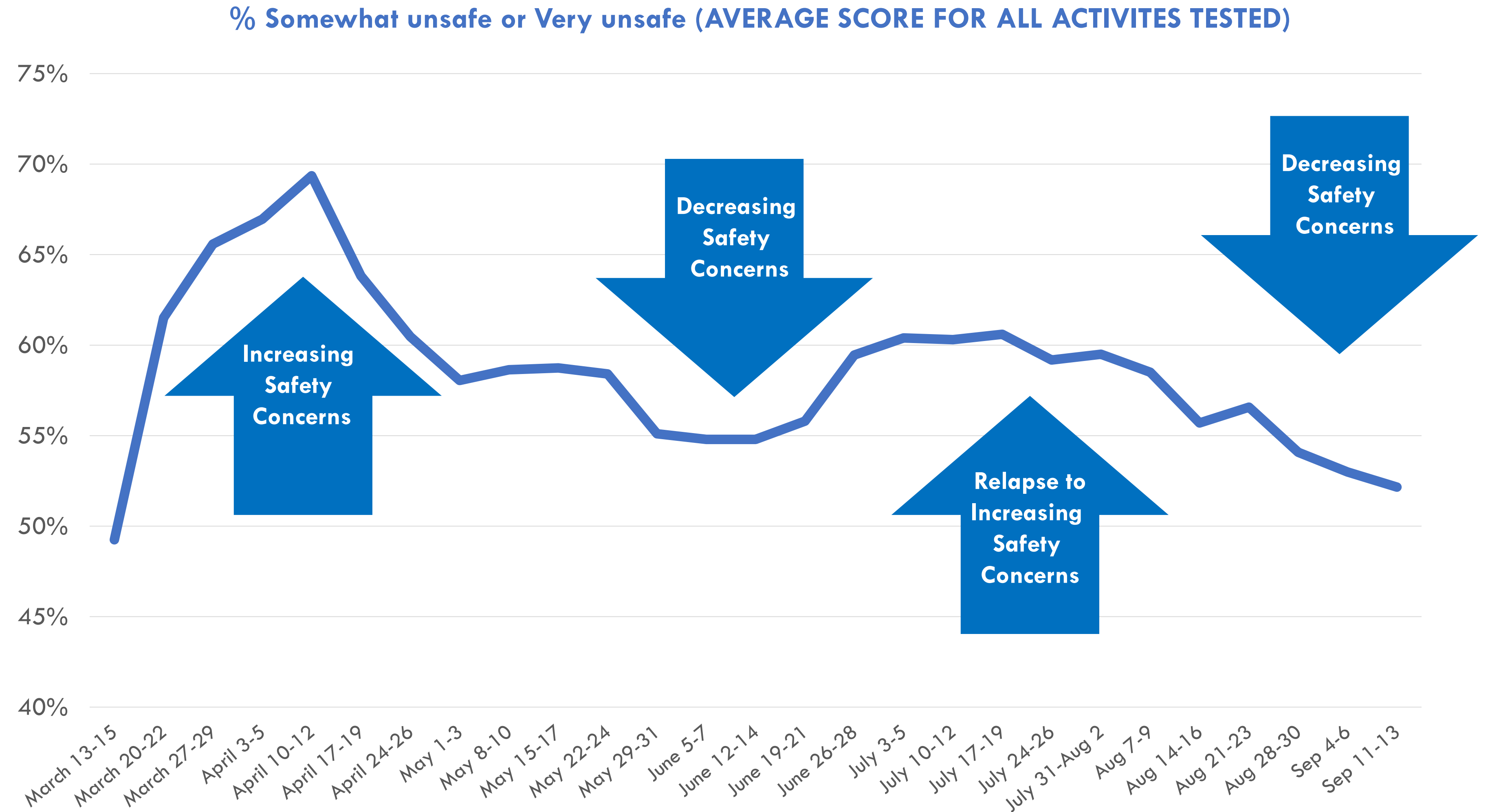
Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-27 COMPARISON)

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

(Base: Waves 1-27. 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, 1,225 and 1,205 completed surveys.)

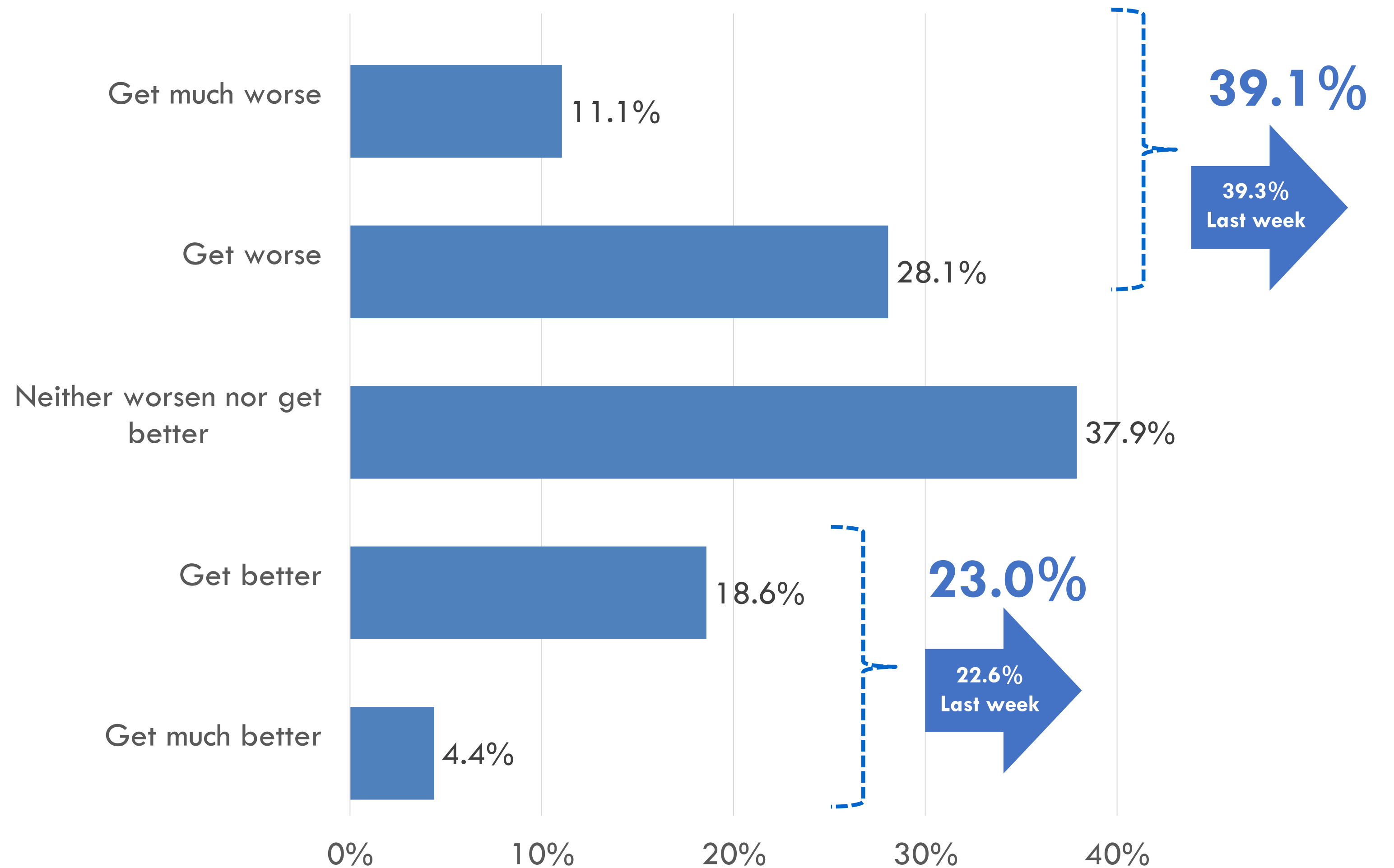


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)

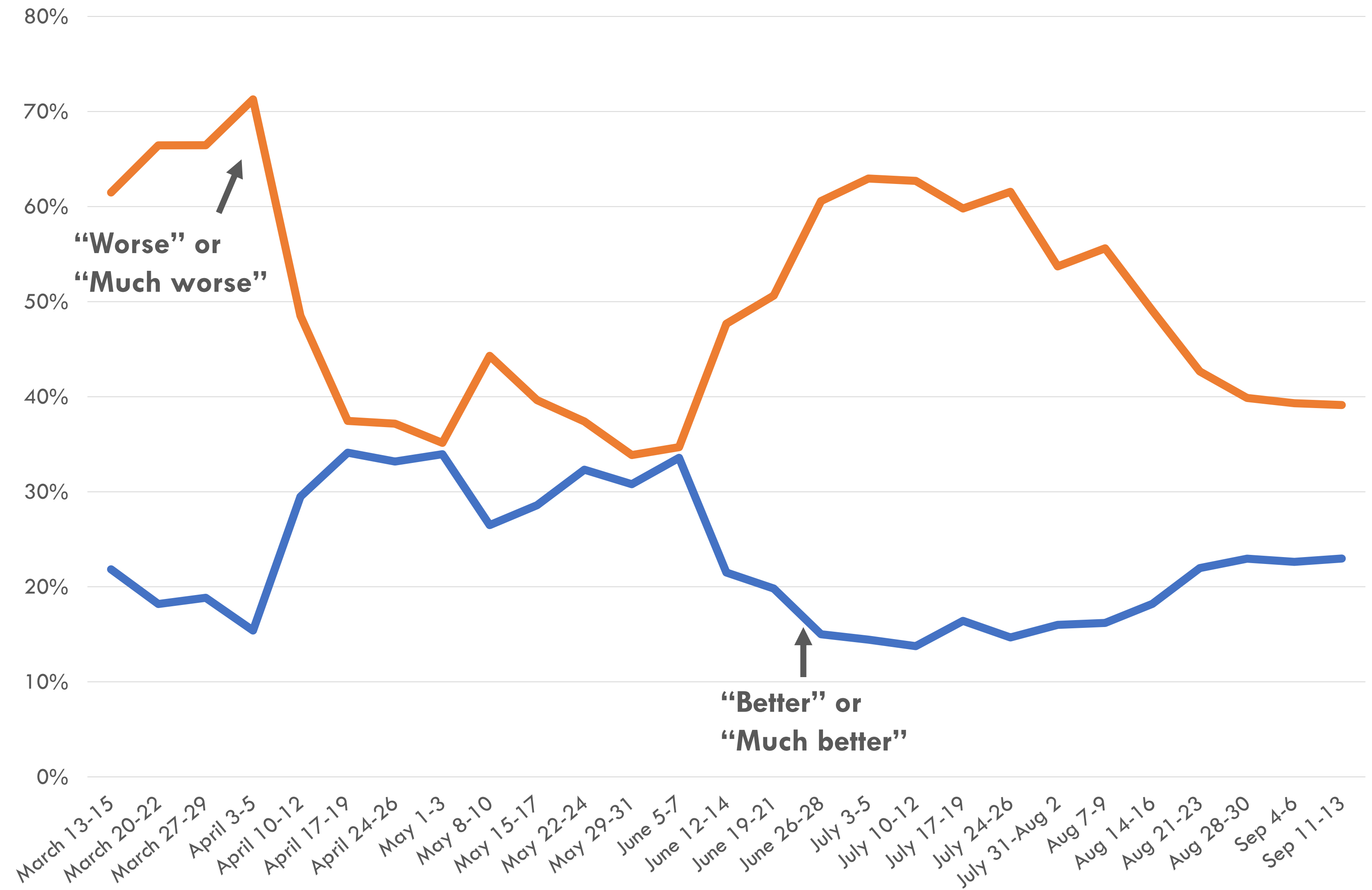


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-27)

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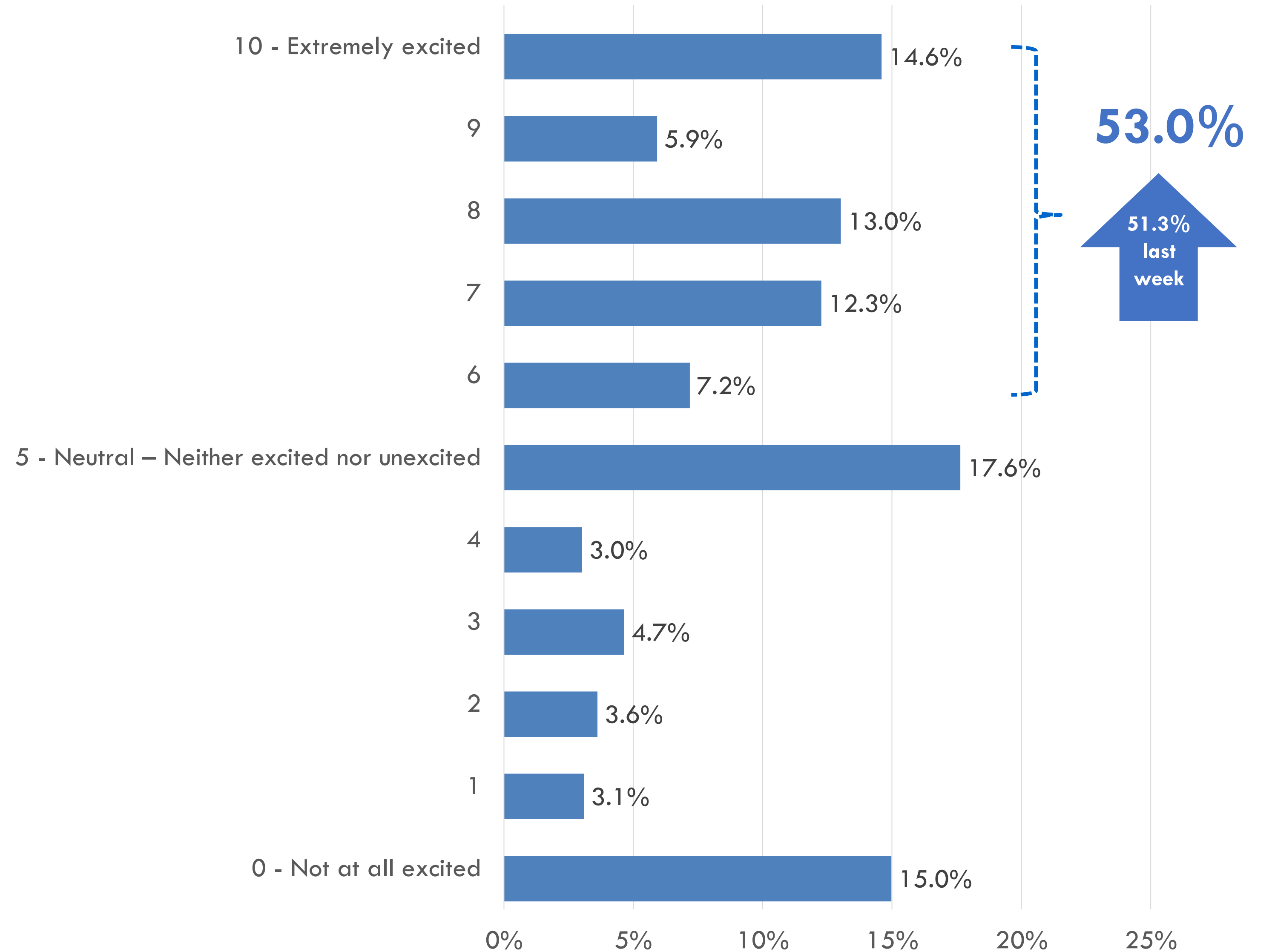


EXCITEMENT TO TRAVEL NOW

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)

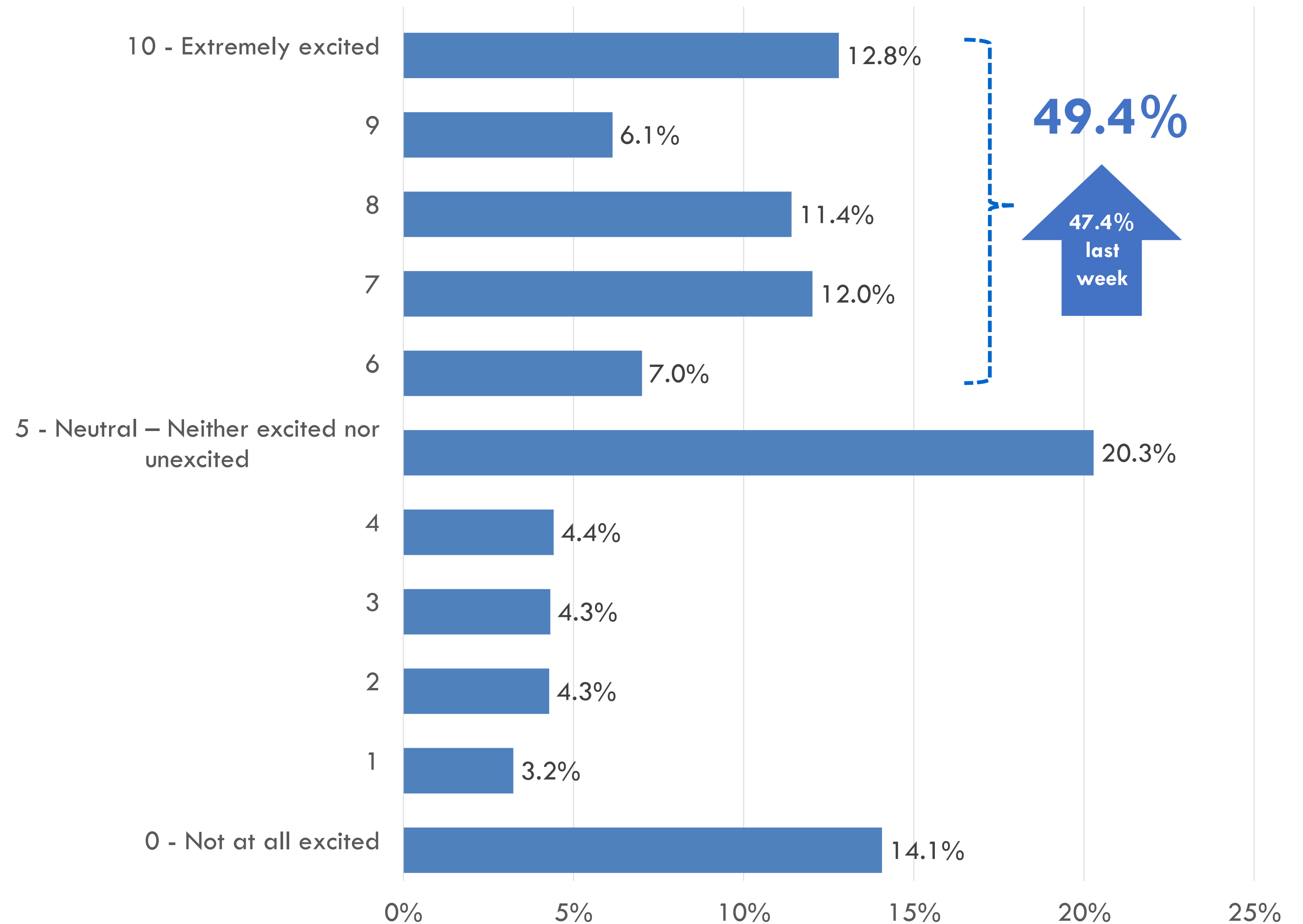
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



OPENNESS TO TRAVEL INFORMATION

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

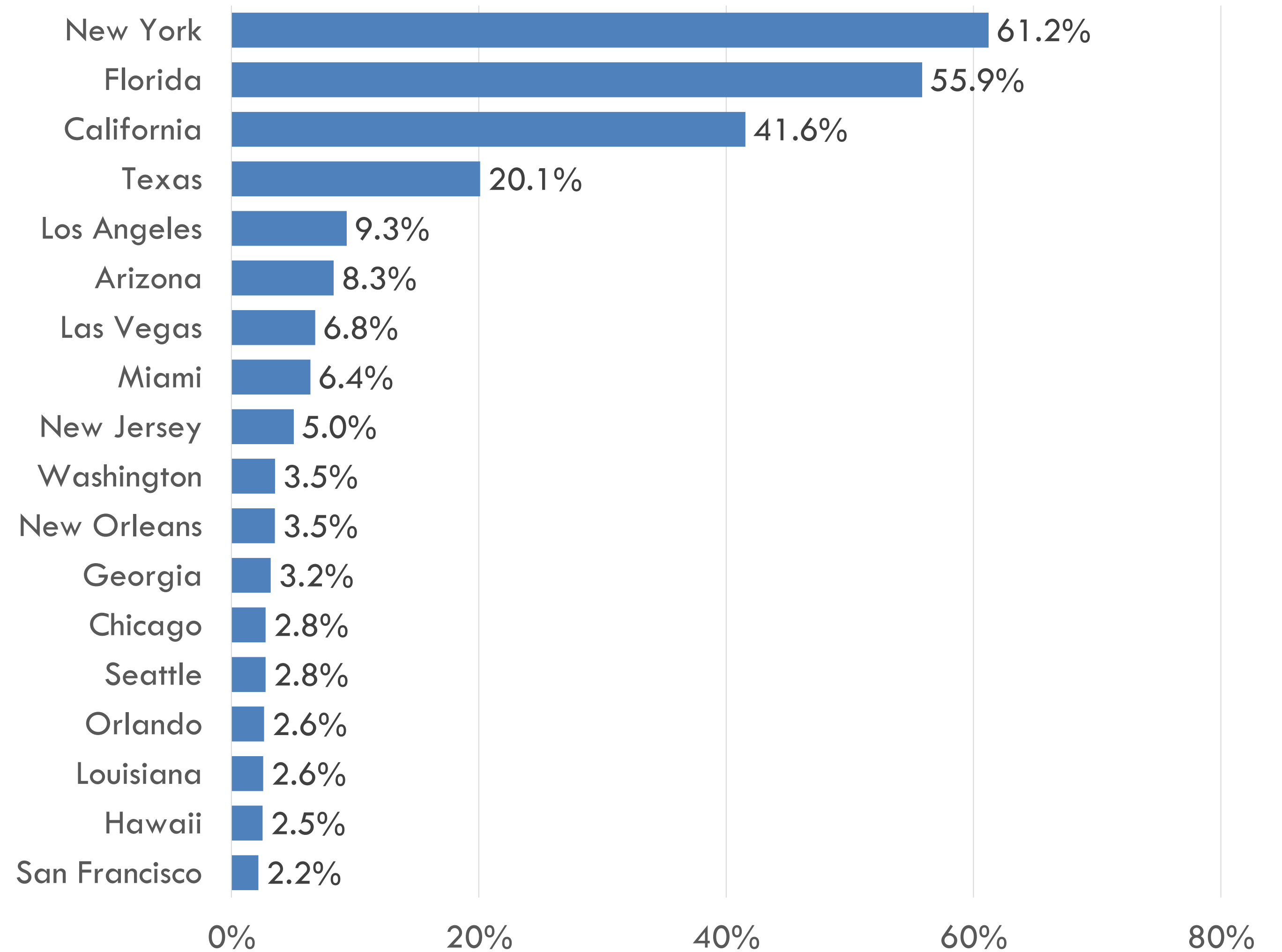
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



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)**

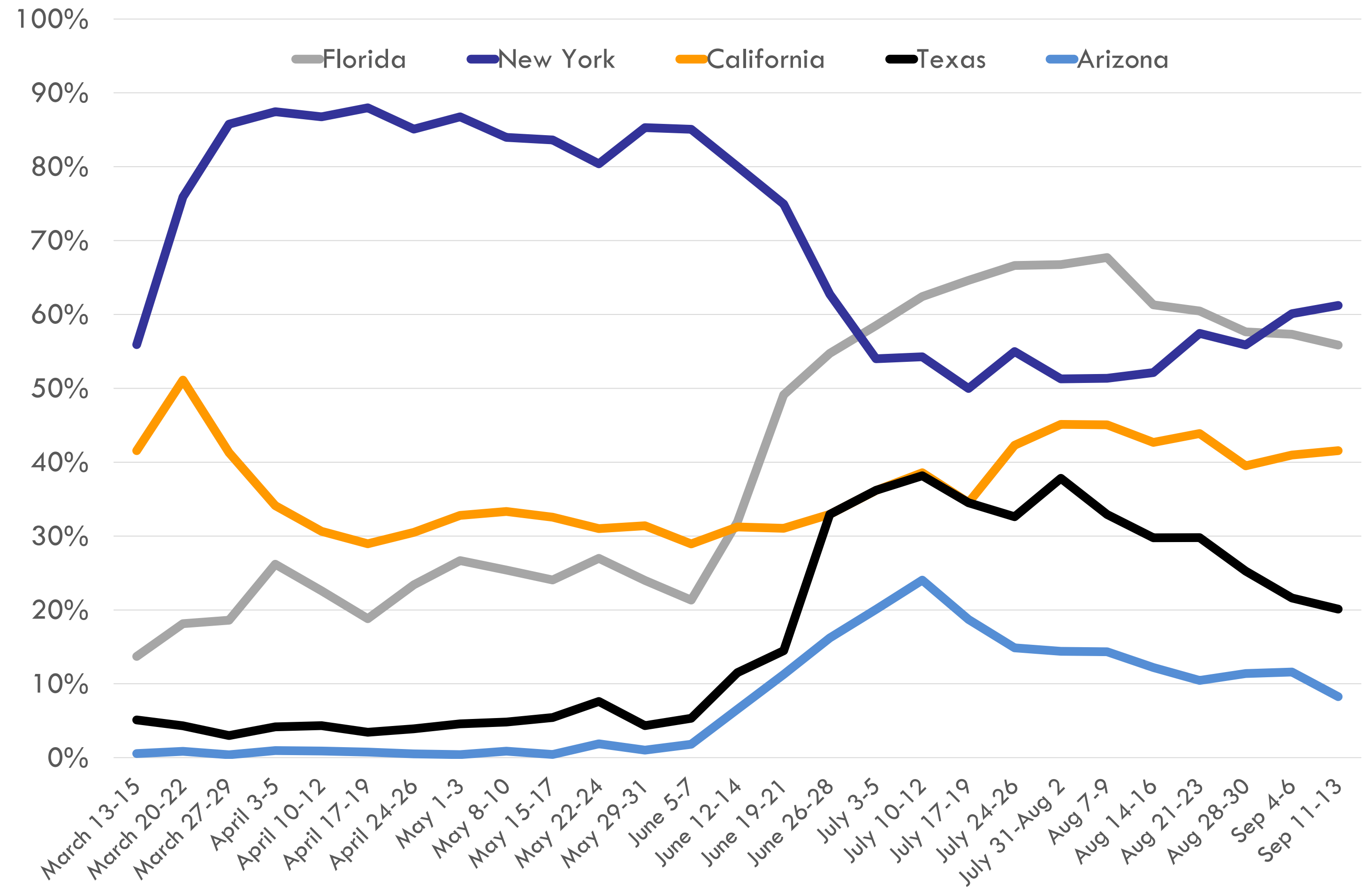
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



MOST TALKED ABOUT CORONAVIRUS HOTSPOTS (WAVES 1-27)

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)

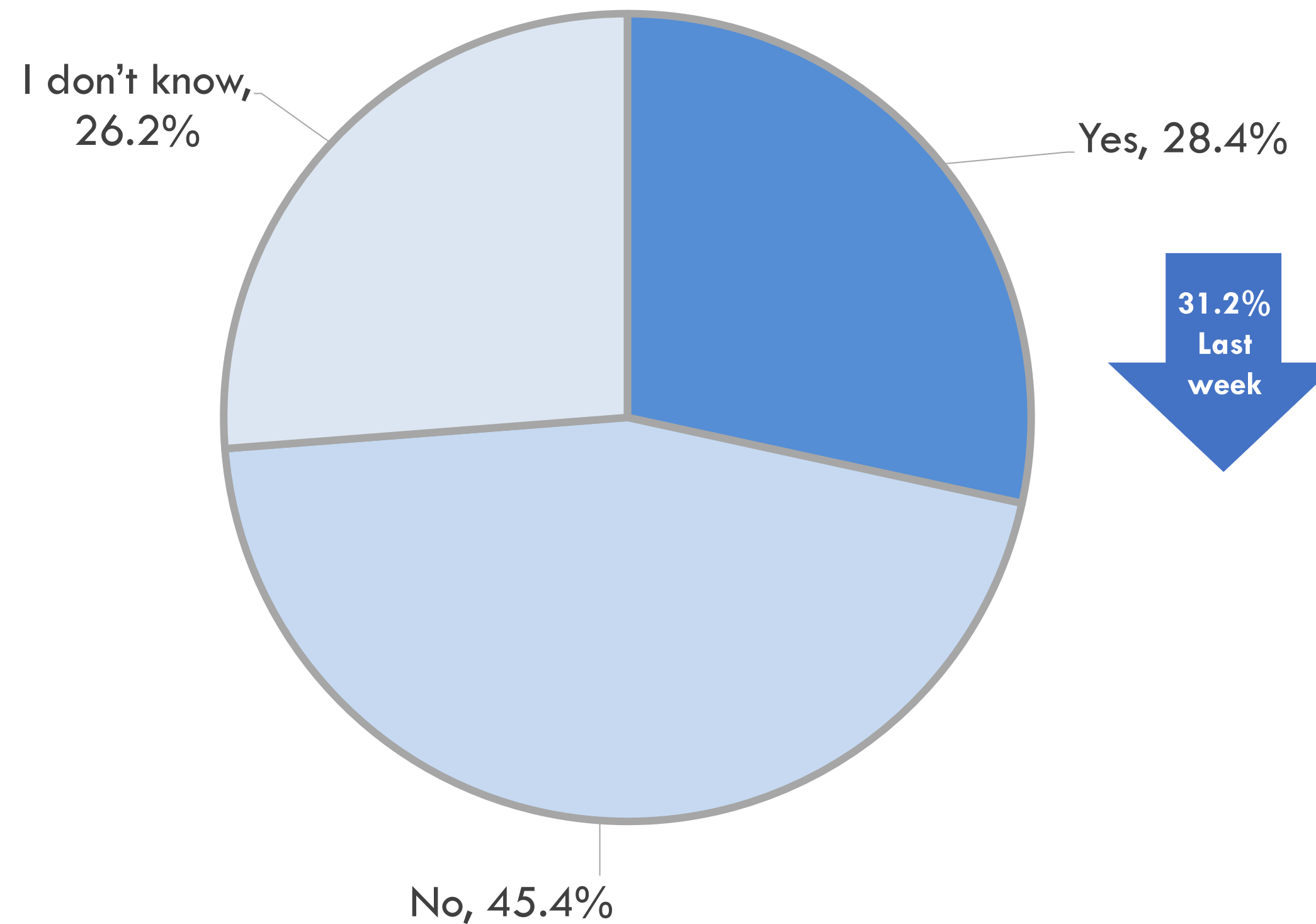
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)



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 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)

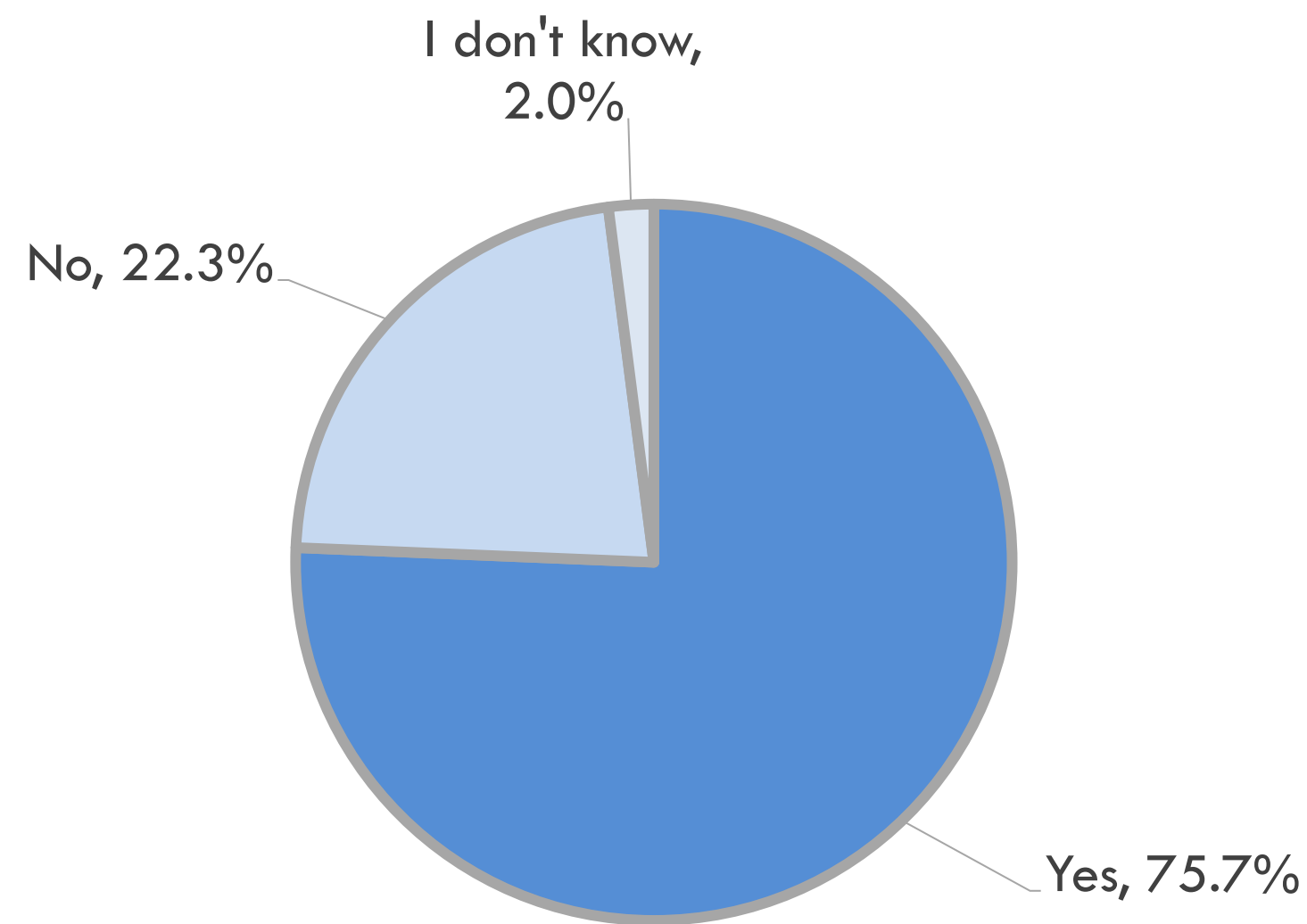


A black, ribbed suitcase sits on a light-colored, textured surface. On top of the suitcase are a blue surgical mask and a small white spray bottle. Next to the suitcase is a pair of blue jeans, a pair of glasses, a light-colored hat, and a brown drawstring bag. The suitcase handle is extended to the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

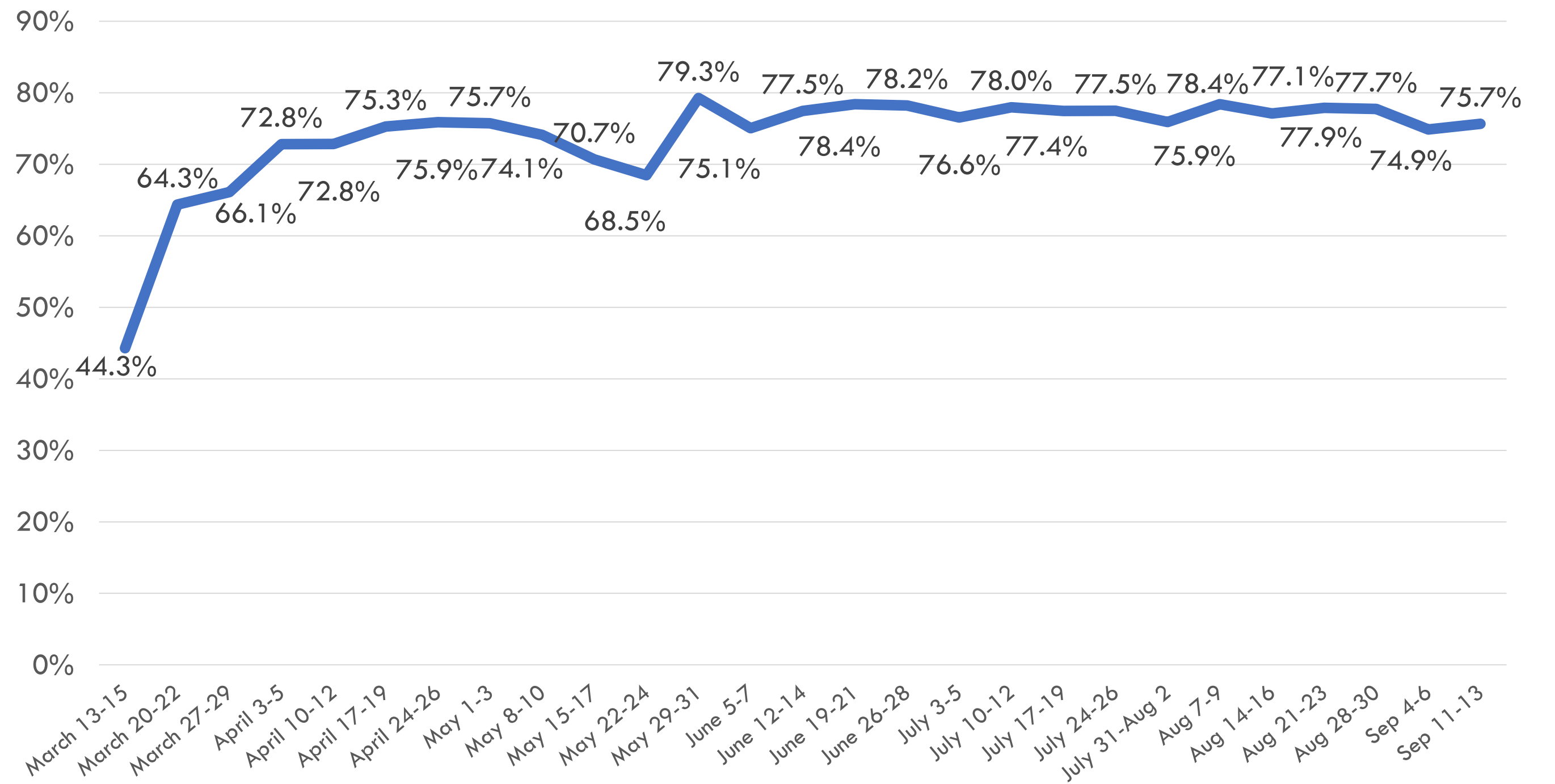
THE PANDEMIC'S IMPACT ON TRAVEL

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



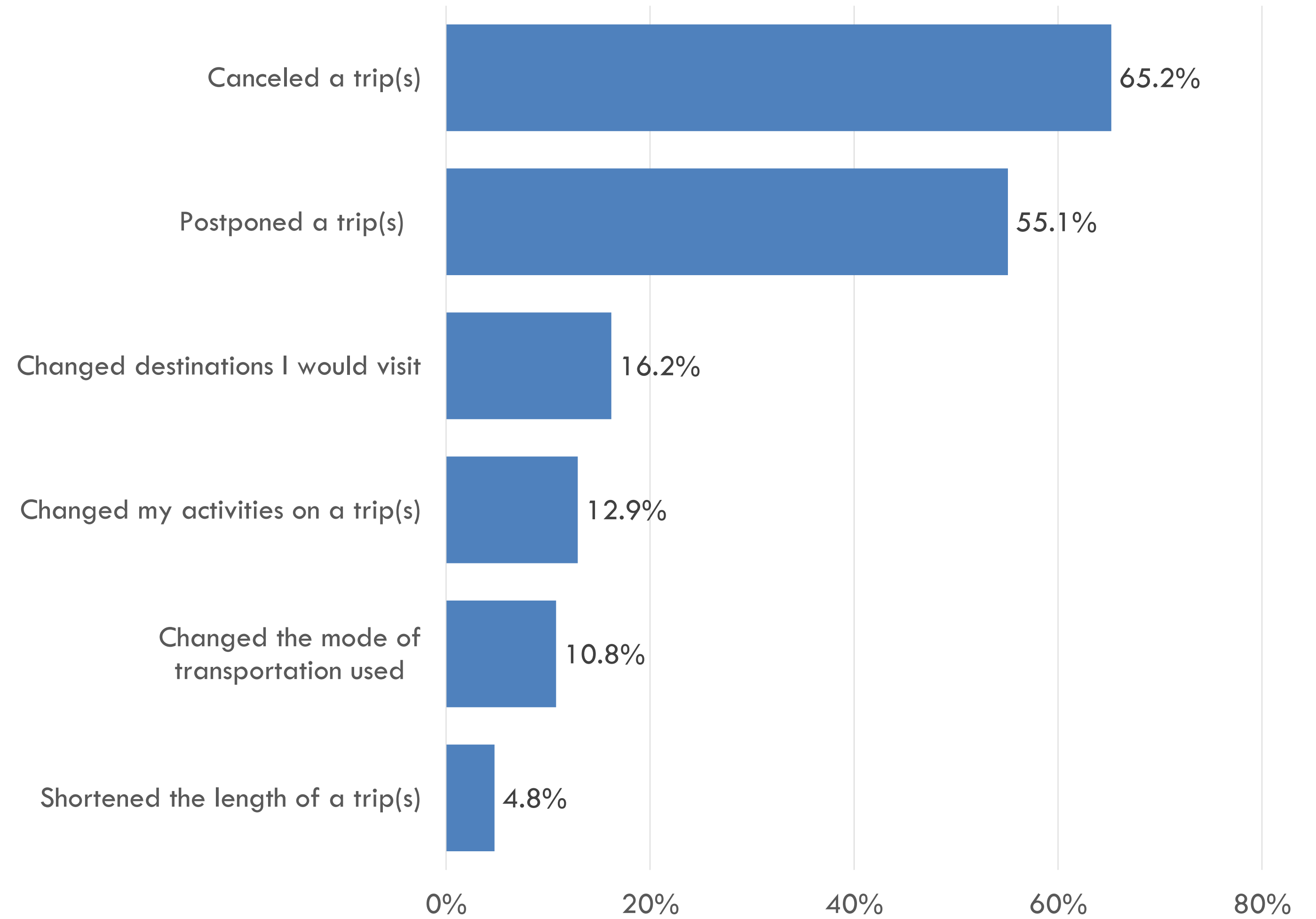
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys)

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_____.

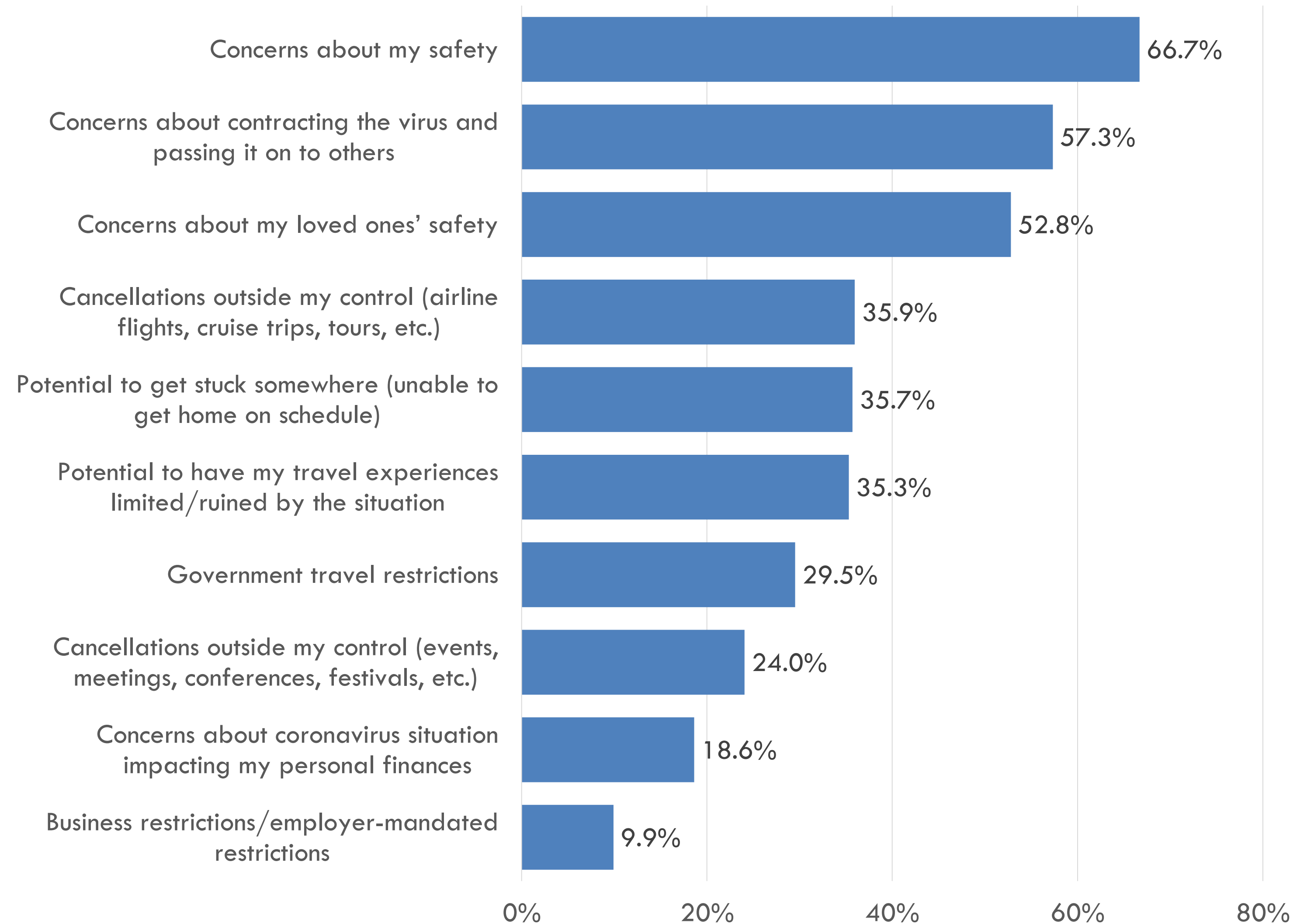
(Base: Wave 27. Respondents whose travel was impacted by the coronavirus, 907 completed surveys. Data collected September 11-13, 2020)



WHY THE CORONAVIRUS IS IMPACTING TRAVEL

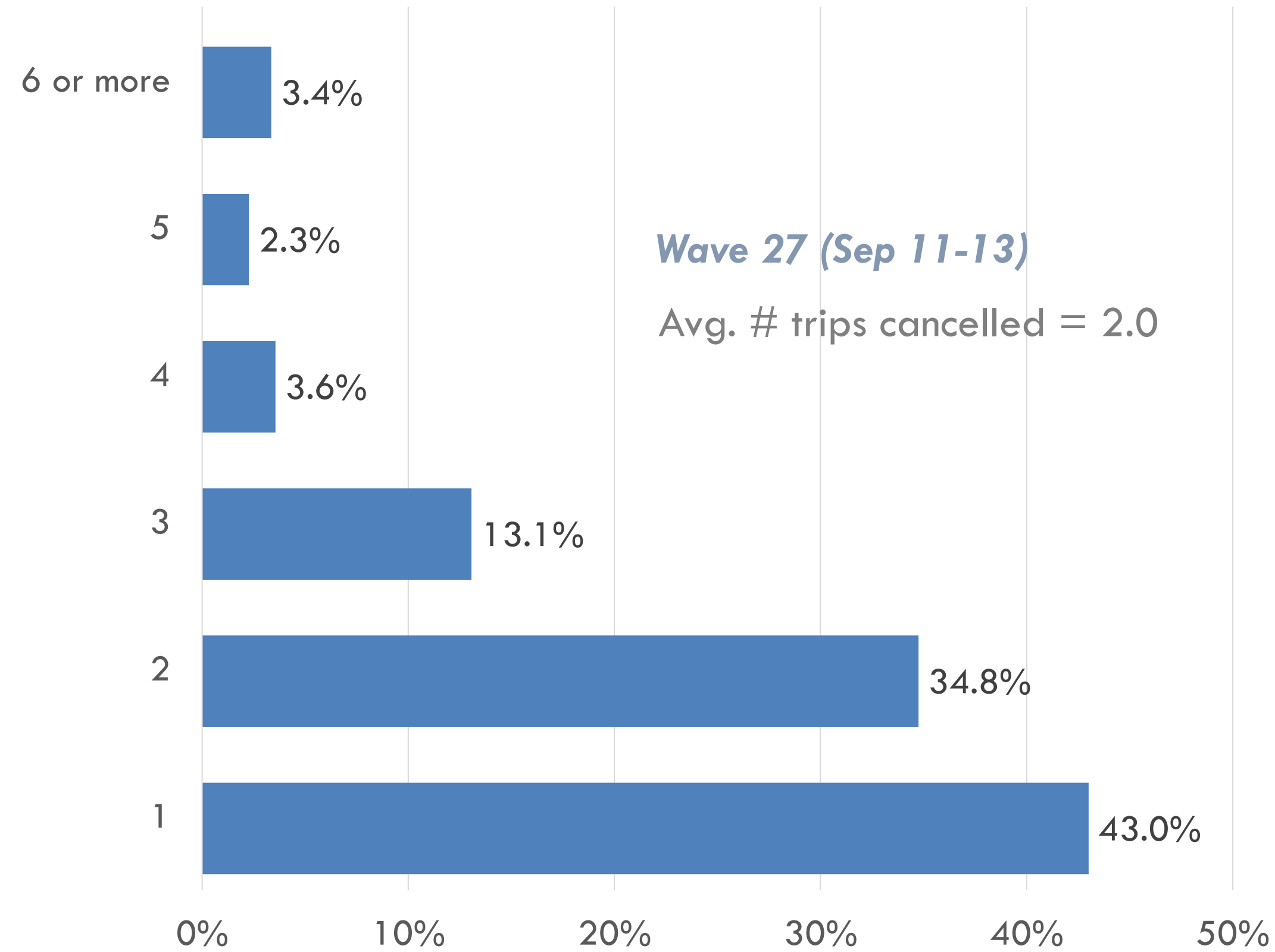
Question: Which of the following are reasons the coronavirus situation has changed your travels?

(Base: Wave 27. Respondents whose travel was impacted by the coronavirus, 902 completed surveys. Data collected September 11-13, 2020)

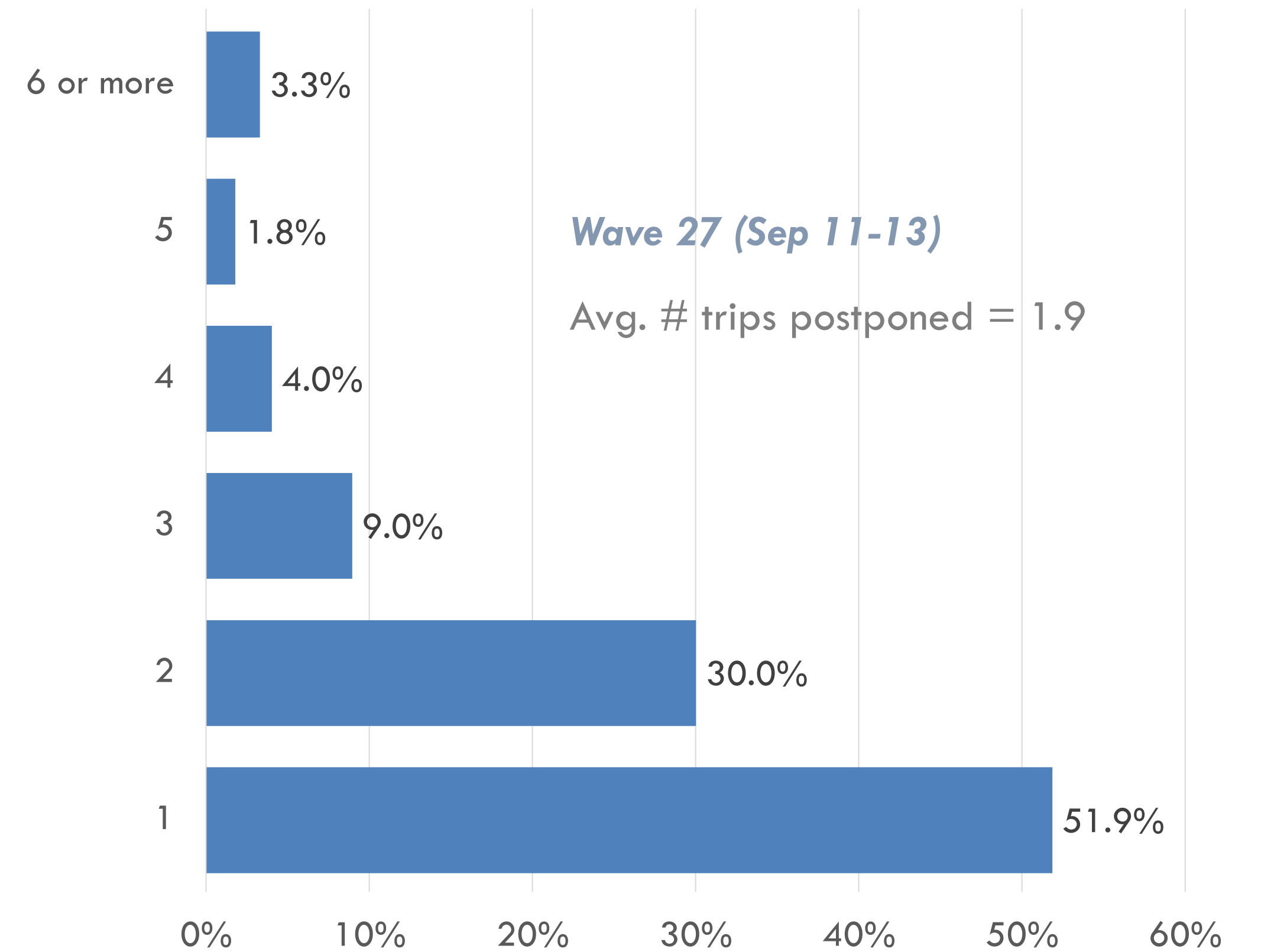


TRIPS CANCELLED/POSTPONED

Question: How many trips did you cancel?



Question: How many trips did you postpone?

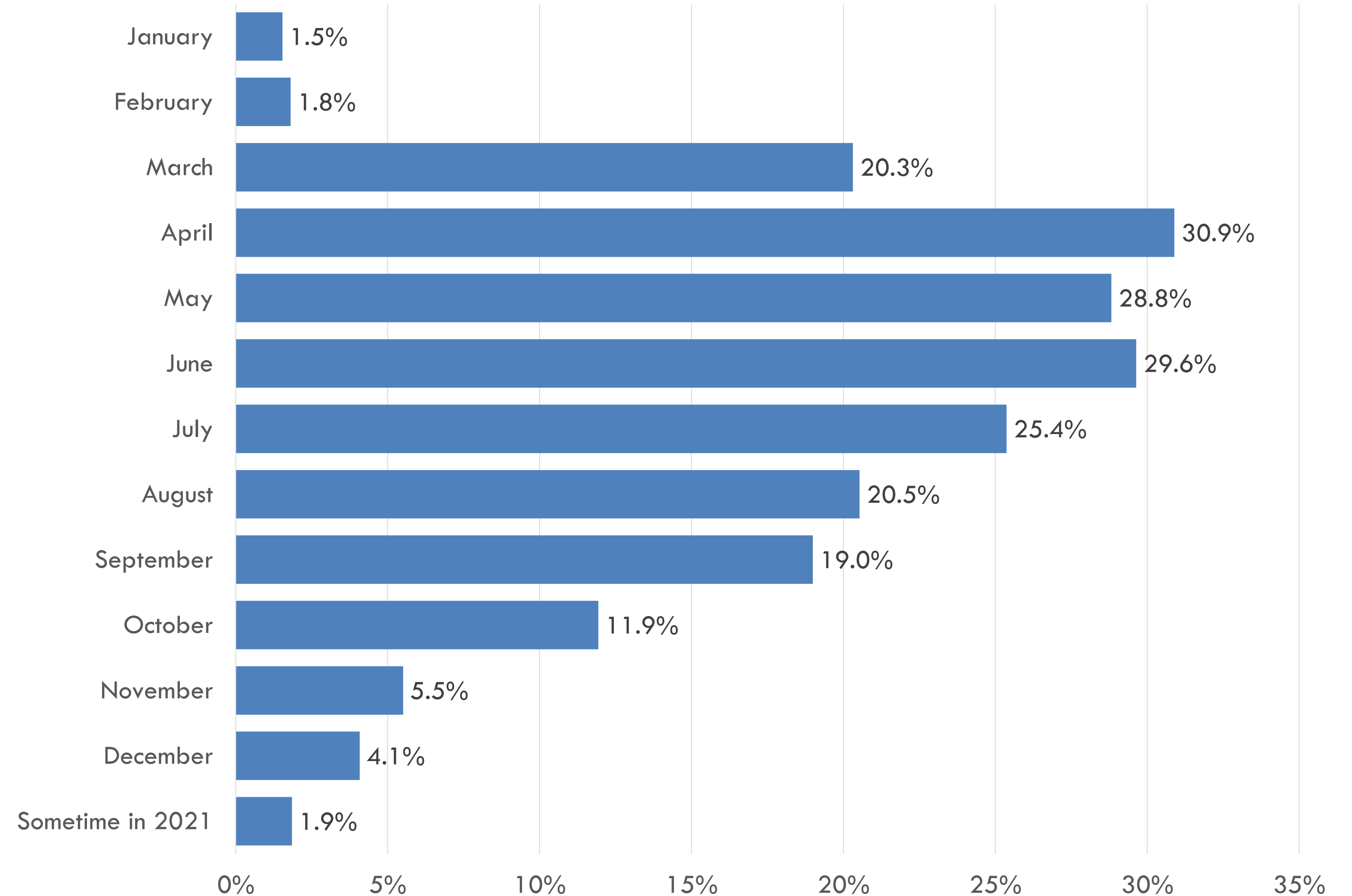


(Base: Wave 27 data. Respondents cancelling/postponing a trip, 613/479 completed surveys. Data collected September 11-13, 2020)

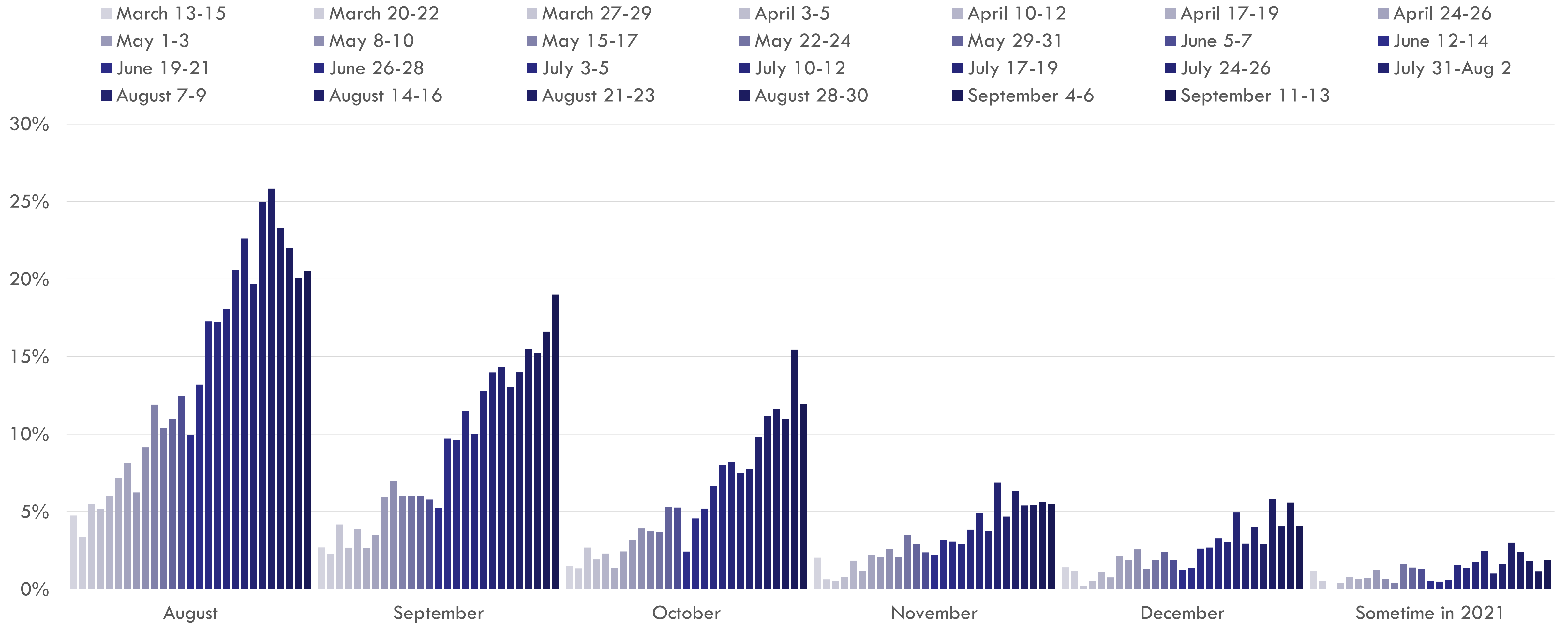
MONTH OF TRIP CANCELLATION

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

(Base: Wave 27 data. Respondents cancelling a trip, 613 completed surveys. Data collected September 11-13, 2020)



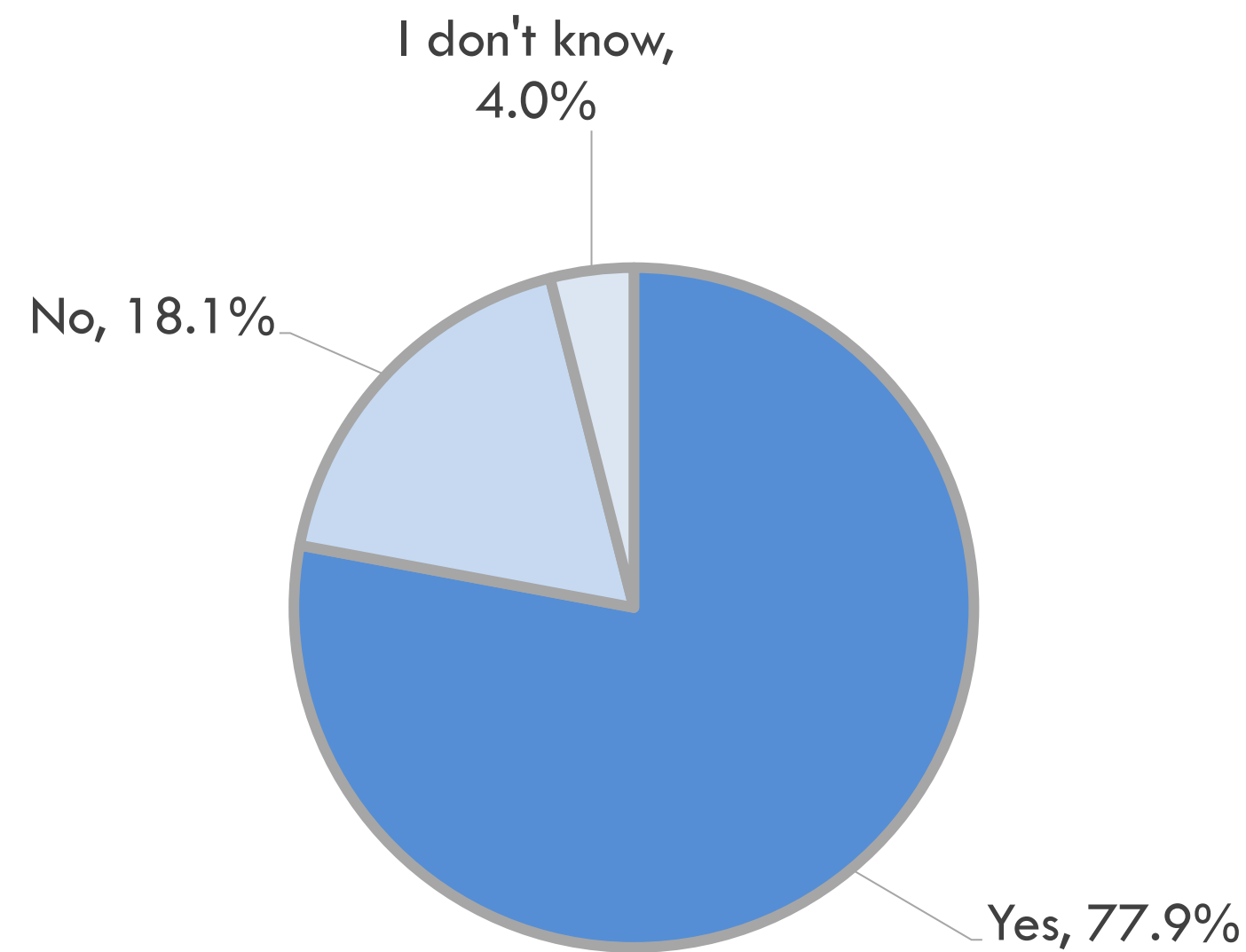
MONTH OF TRIP CANCELLATION



(Base: Waves 1-27. 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, 654 and 613 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, Sep 4-6 and 11-13, 2020)

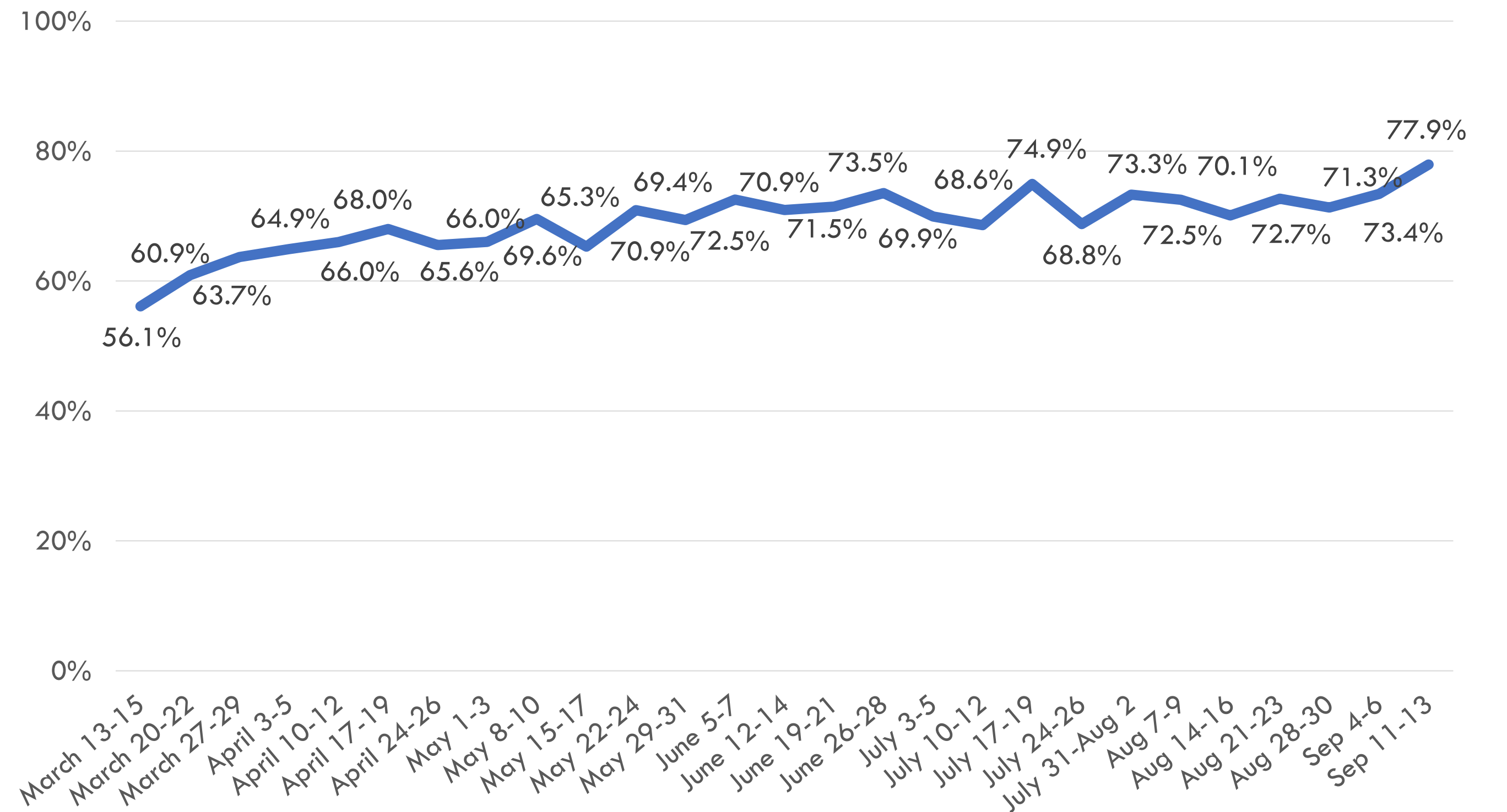
DID TRAVELER GET FULL REFUNDS?

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



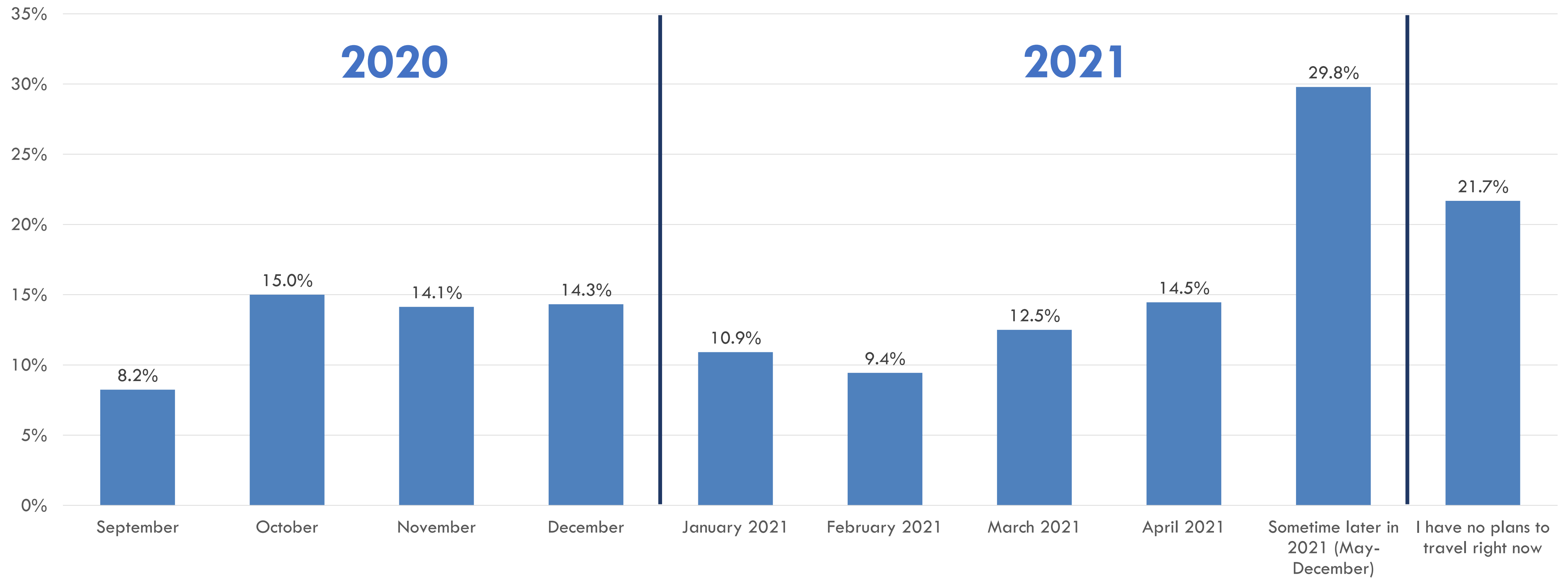
(Base: Wave 27 data. Respondents cancelling a trip, 613 completed surveys. Data collected September 11-13, 2020)

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?

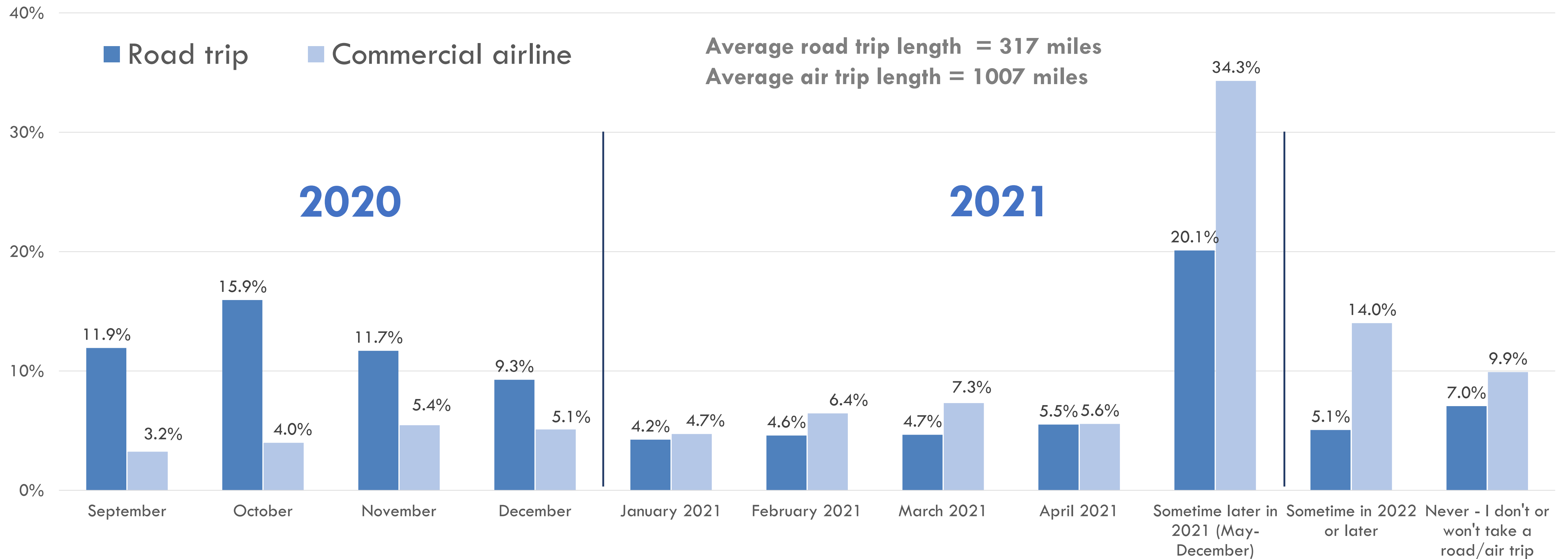


(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)

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 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)

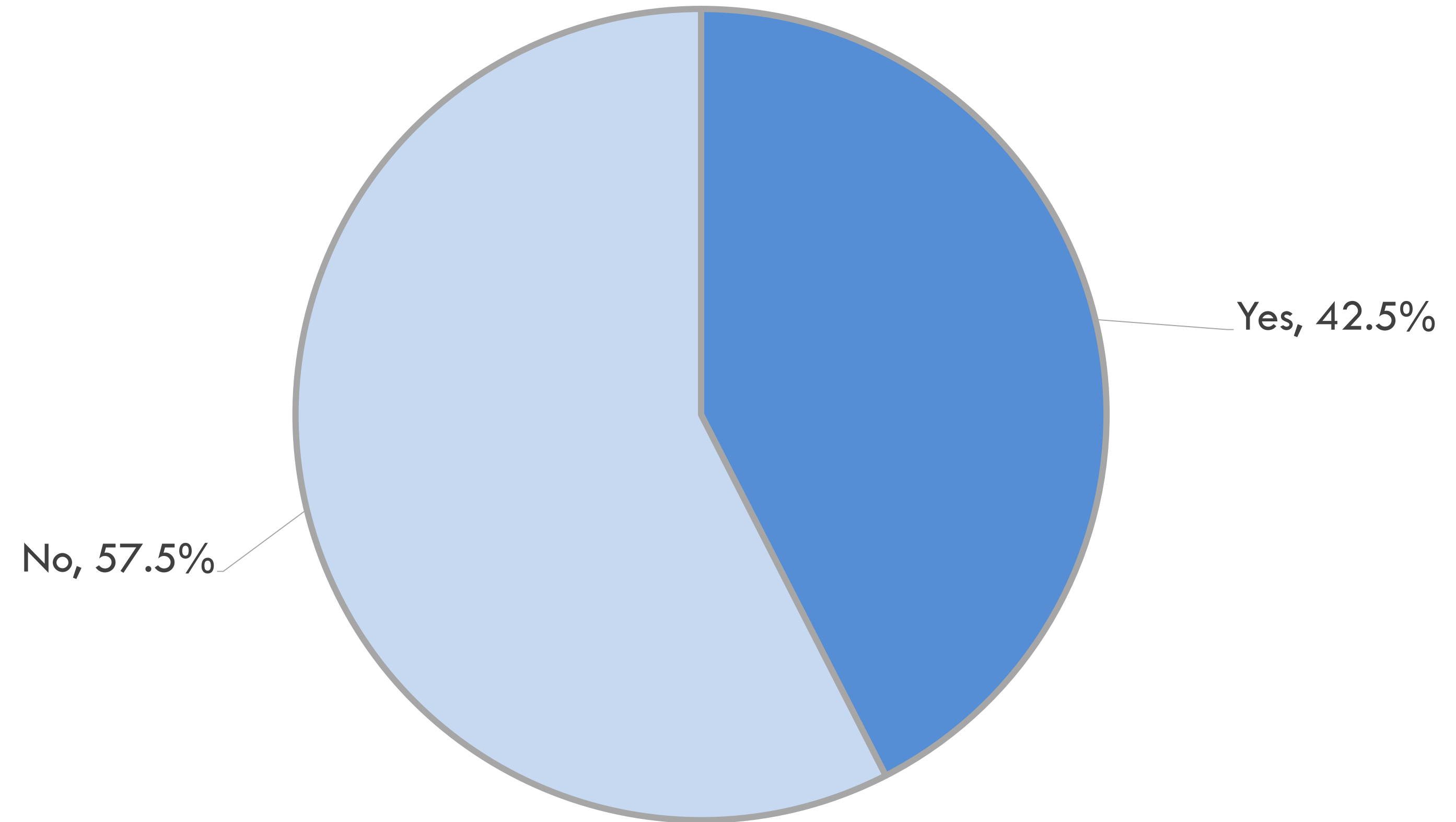
A woman with long brown hair, wearing a light blue tank top and a wide-brimmed straw hat decorated with colorful tassels, is seen from behind, sitting in the driver's seat of a dark convertible car. Her arms are outstretched, and she is driving on a paved road that curves through a lush, green, hilly landscape under a blue sky with scattered clouds. The text "SUMMER 2020 TRAVEL" is overlaid in the center of the image.

SUMMER 2020 TRAVEL

SUMMER LEISURE TRIPS

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

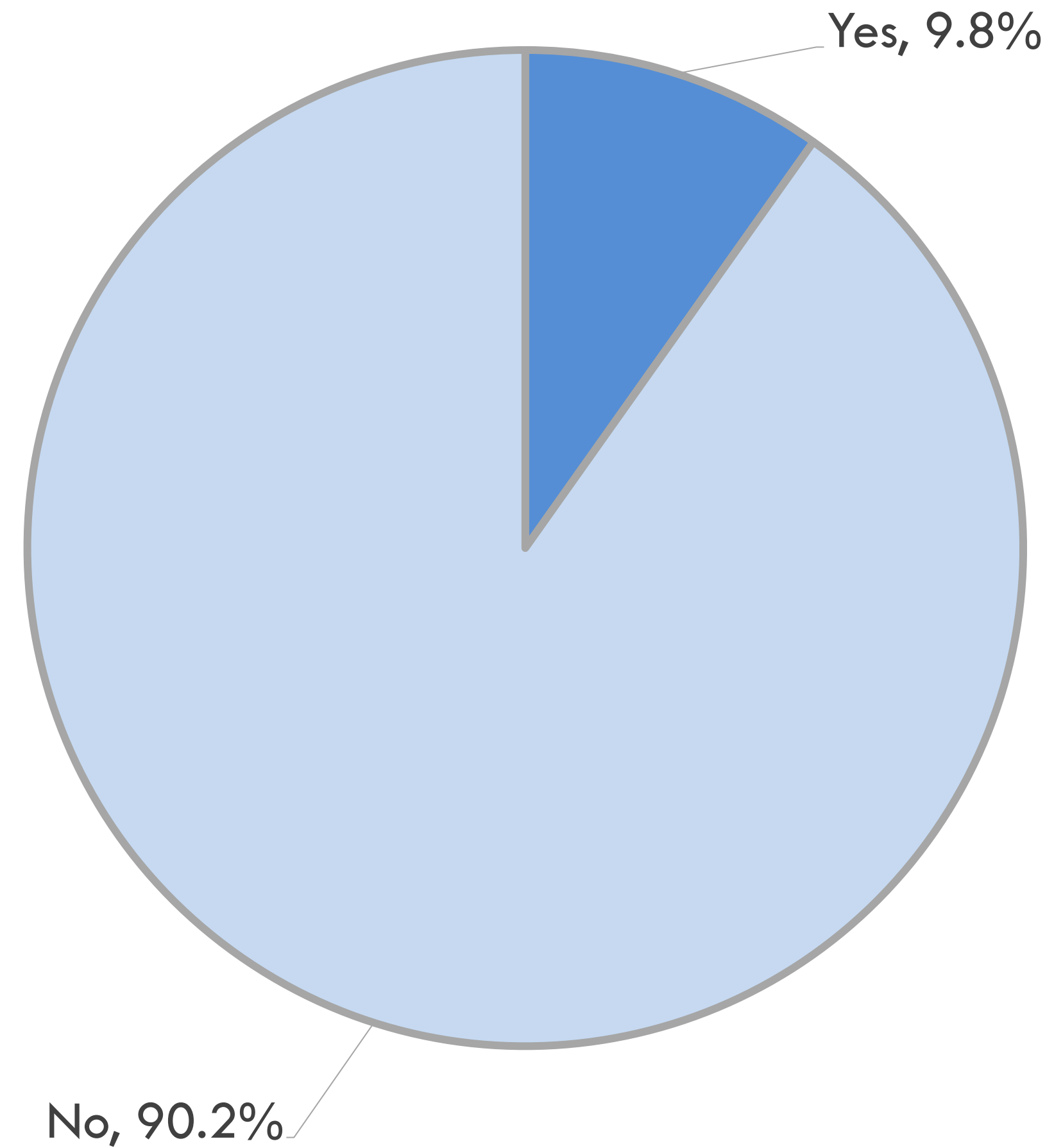
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



SUMMER BUSINESS TRIPS

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

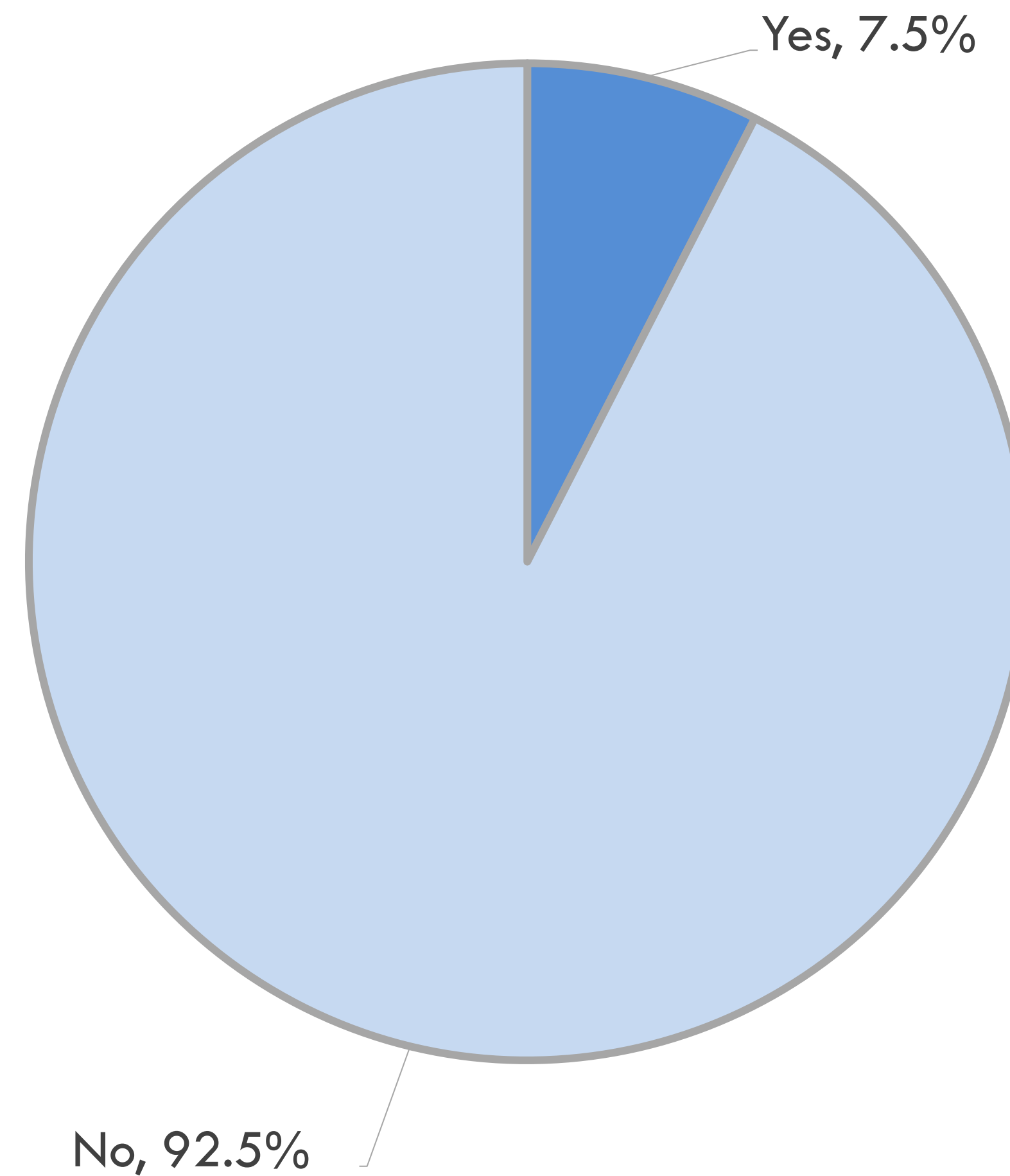
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



SUMMER MEETINGS-RELATED TRIPS

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

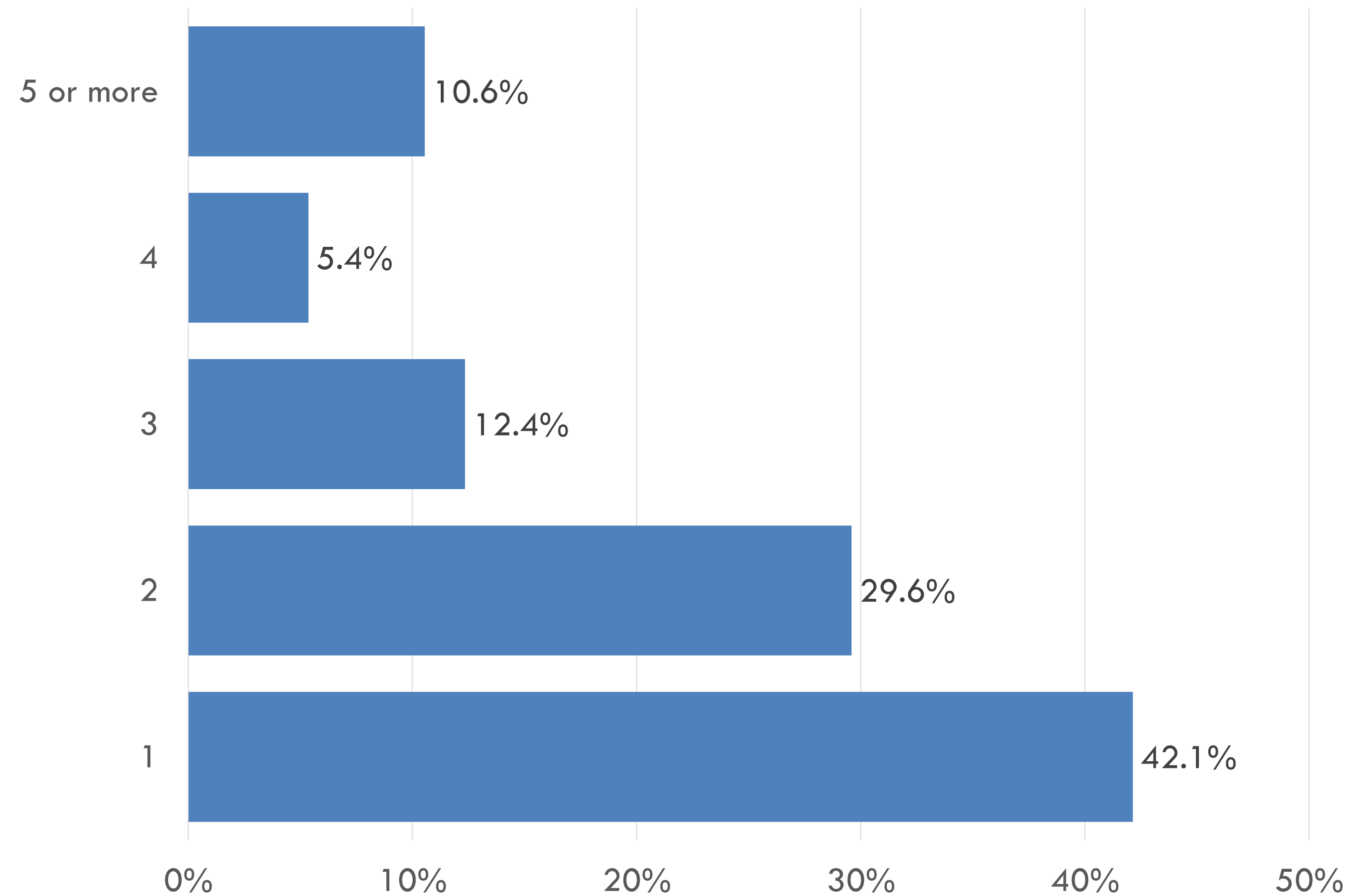
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



NUMBER OF SUMMER LEISURE TRIPS

Question: How many total leisure trips did you take this summer (June 1st to today)? (Select one)

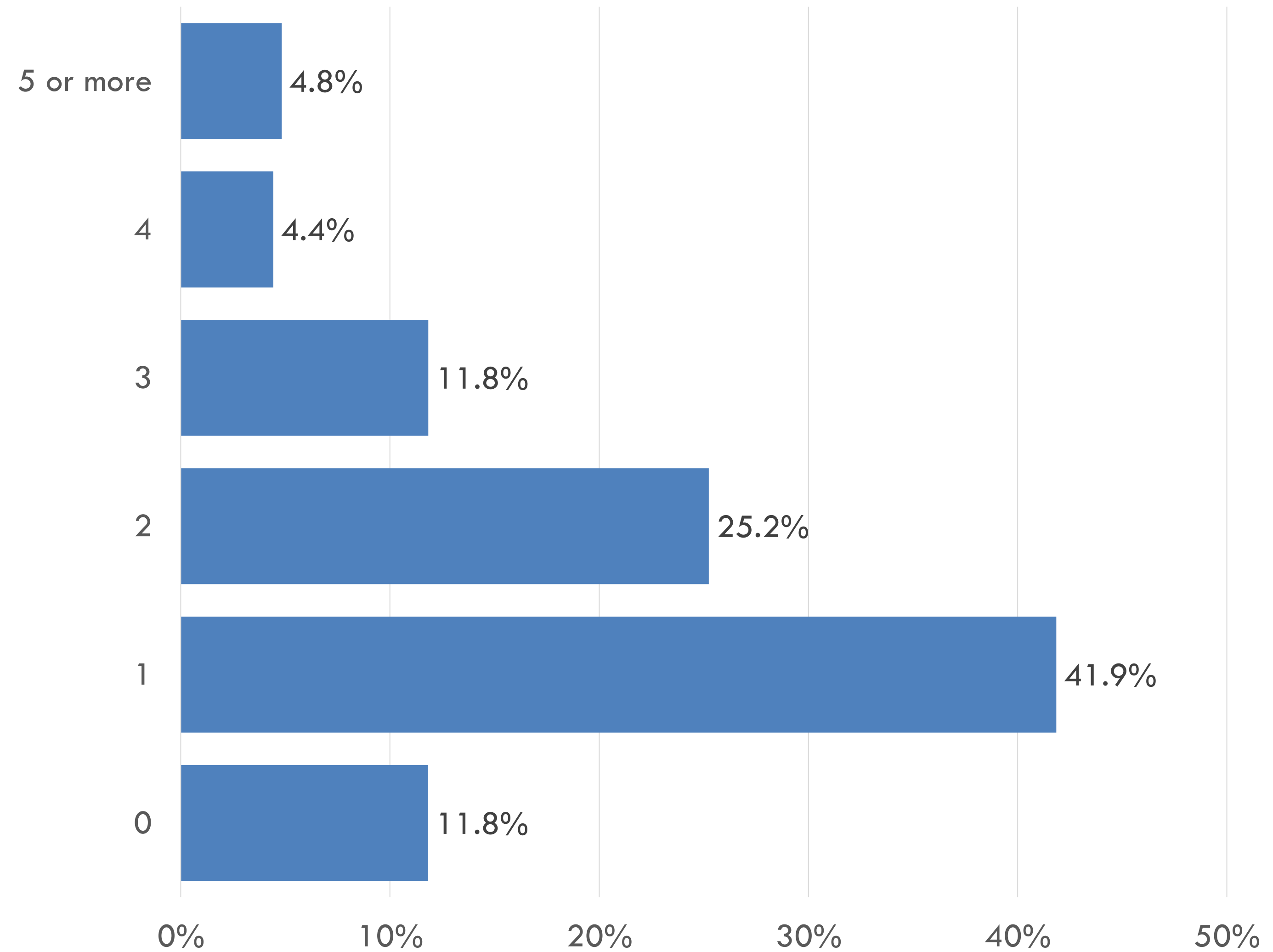
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



NUMBER OF SUMMER OVERNIGHT LEISURE TRIPS

Question: How many of your summer leisure trips were **OVERNIGHT TRIPS** (at least one night away from home)? (Select all that apply)

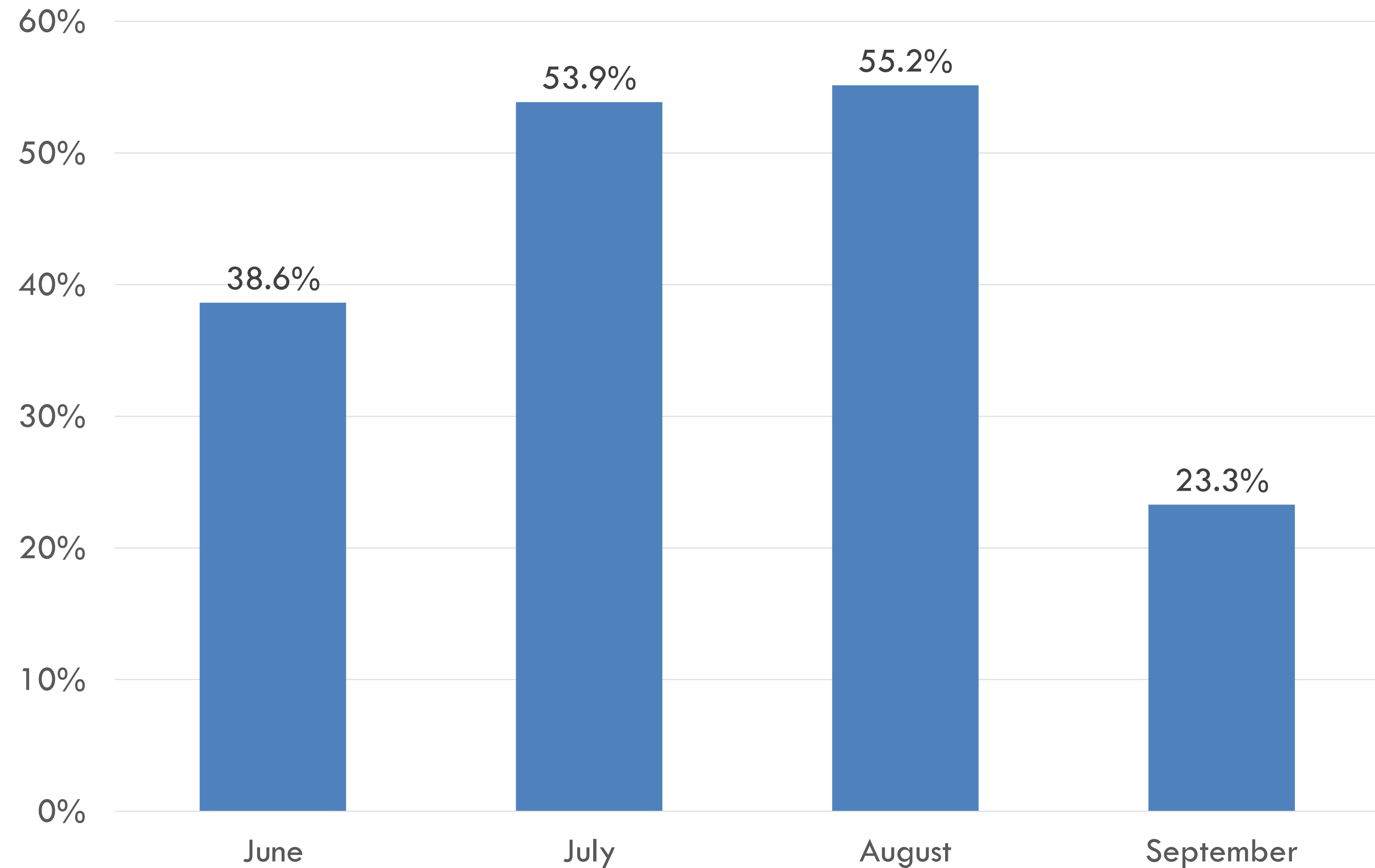
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



SUMMER LEISURE TRIPS: MONTH OF TRIP(S)

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

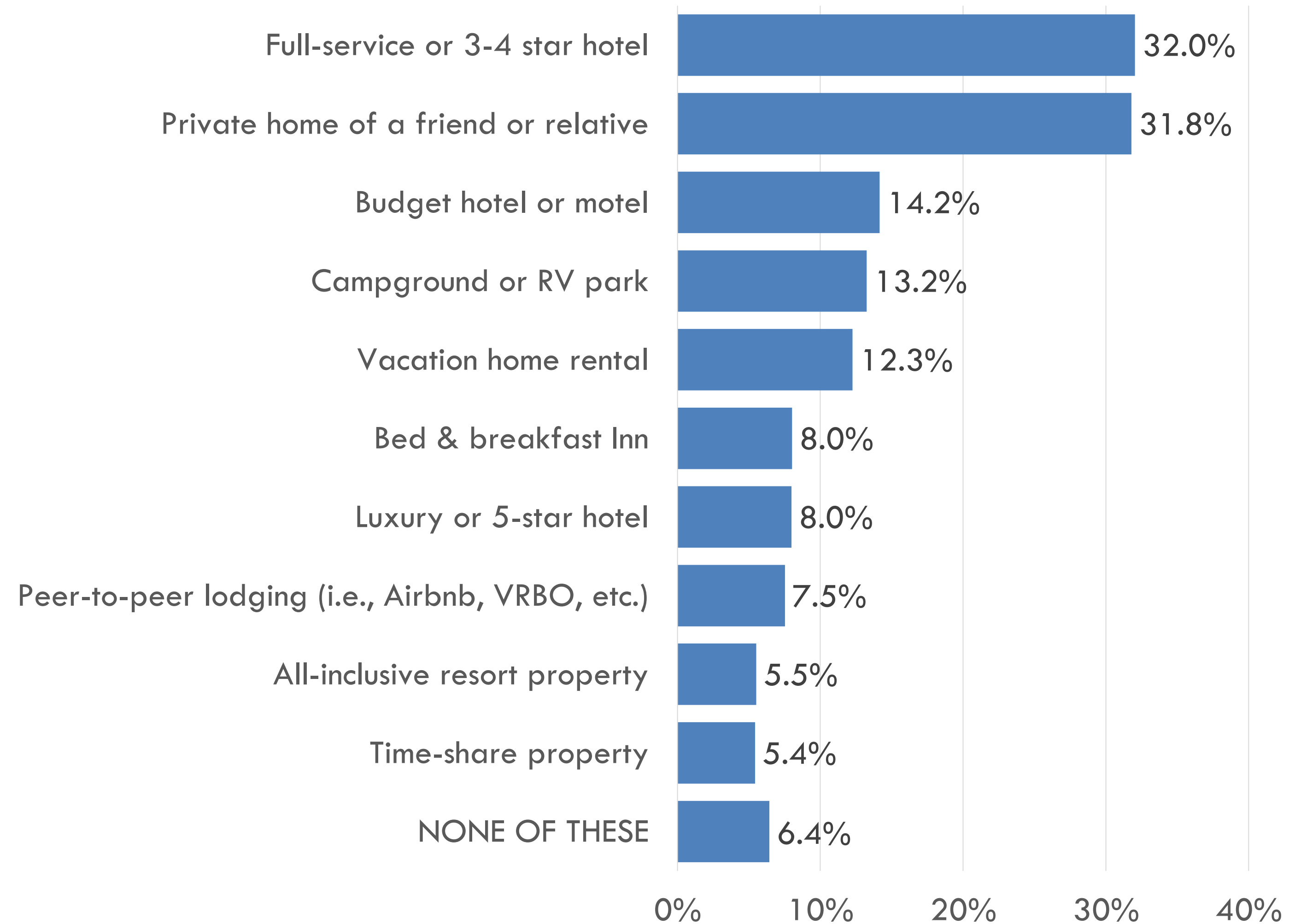
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



SUMMER LEISURE TRIPS: 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)

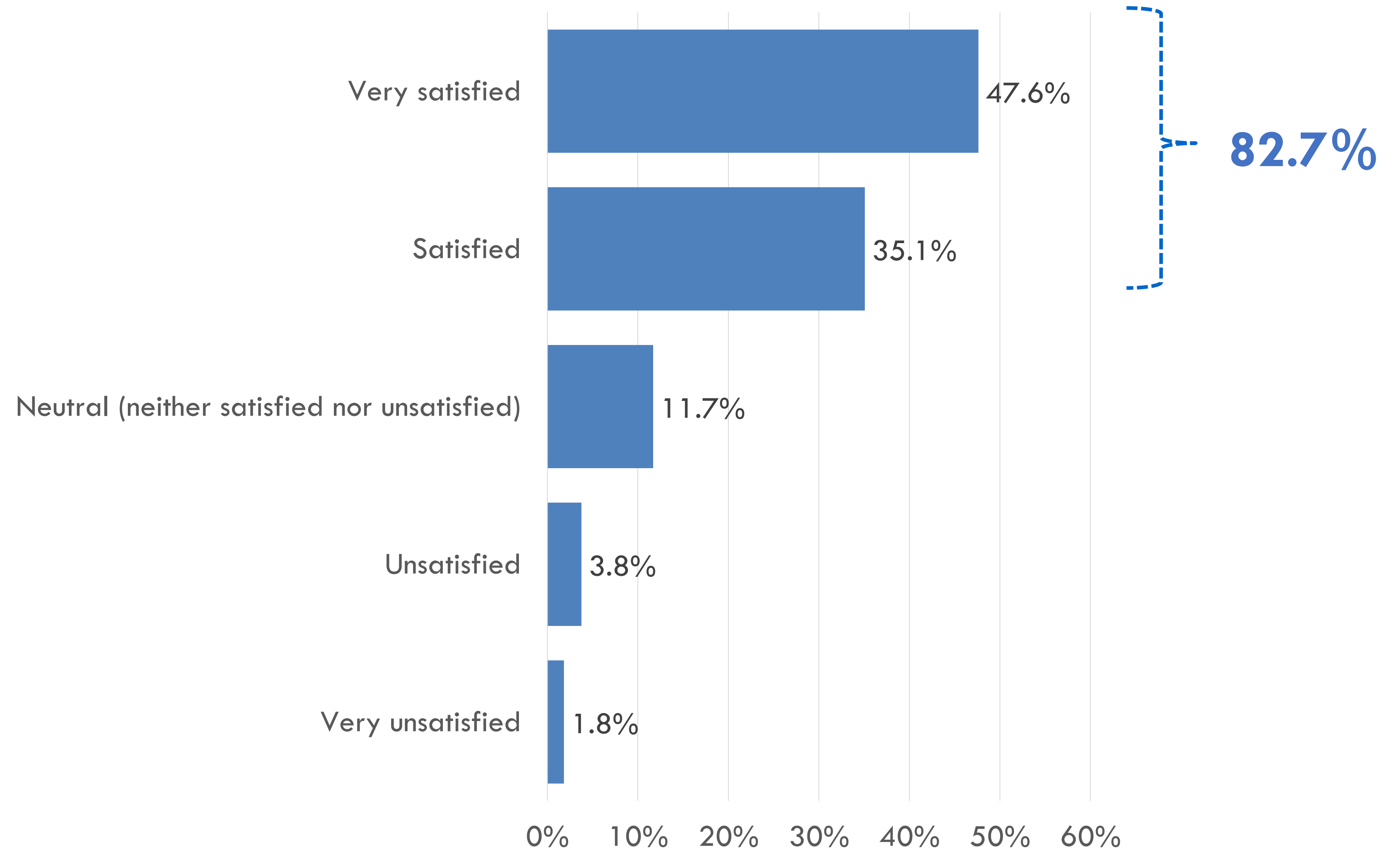
(Base: Wave 27 data. Respondents taking an overnight summer leisure trip, 430 completed surveys. Data collected September 11-13, 2020)



SATISFACTION WITH HOTEL SAFETY PROTOCOLS

Question: In general, how satisfied were you with the Coronavirus safety protocols put in place by your lodging property? (Select one)

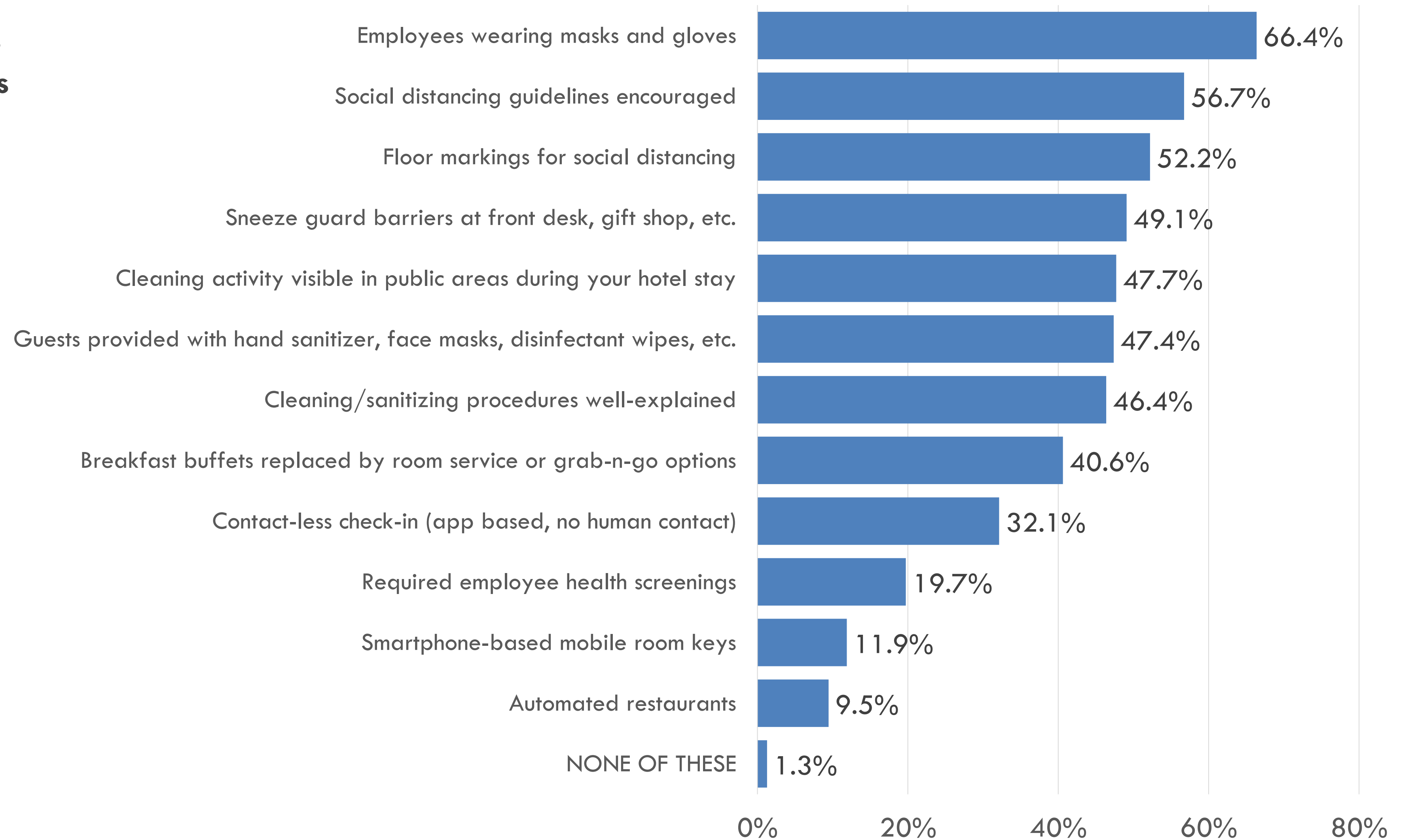
(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)



HOTEL SAFETY PROTOCOLS: AWARENESS

Question: Which of the following **SAFETY PROTOCOLS** did you see in place in any lodging properties you stayed at this summer?

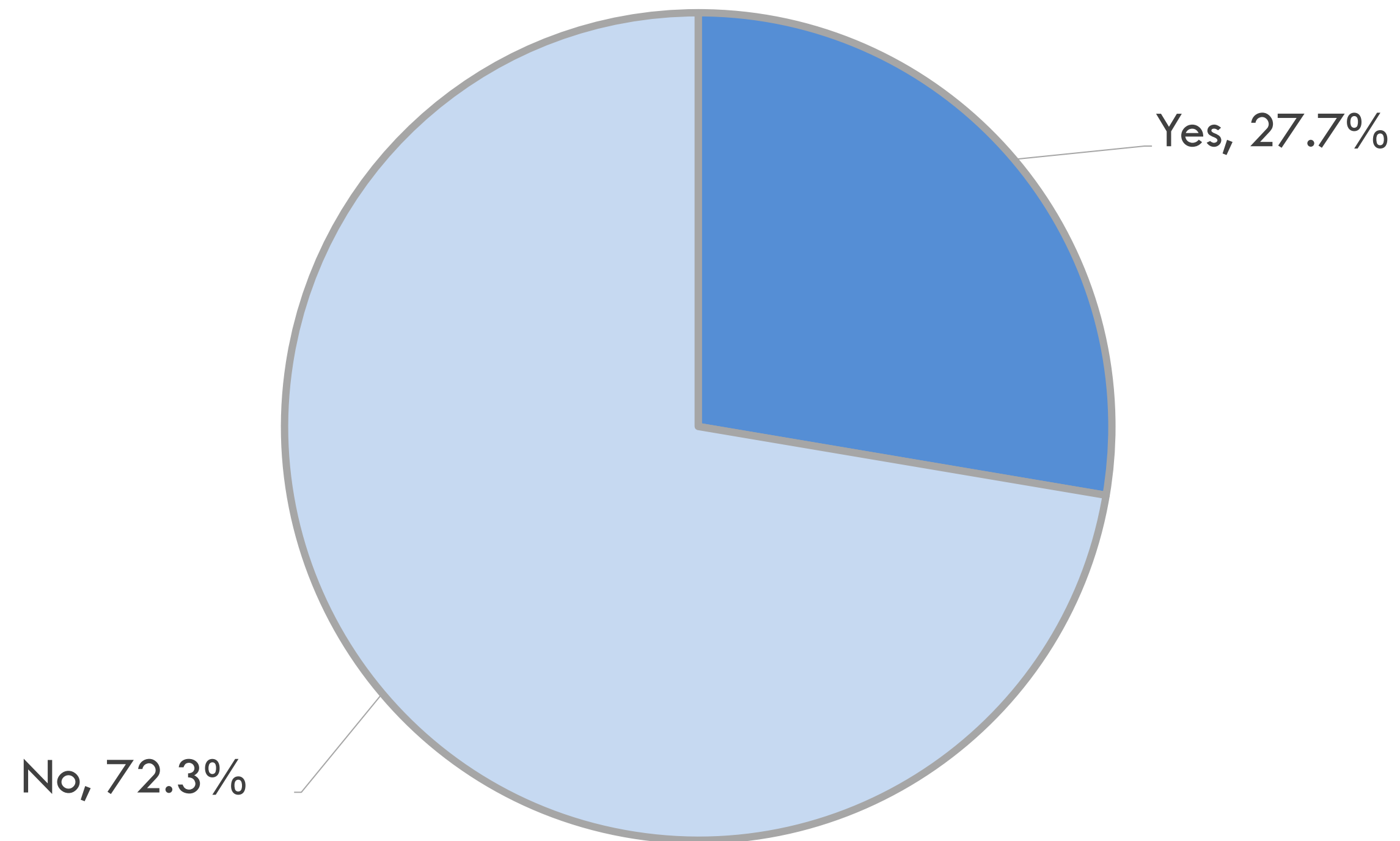
(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)



HOTEL SAFETY PROTOCOLS: SAFETY CONCERNS

Question: Thinking about Coronavirus concerns, at any point during your most recent stay in a lodging property did you feel concerned about your safety **WHILE AT THE LODGING PROPERTY?**

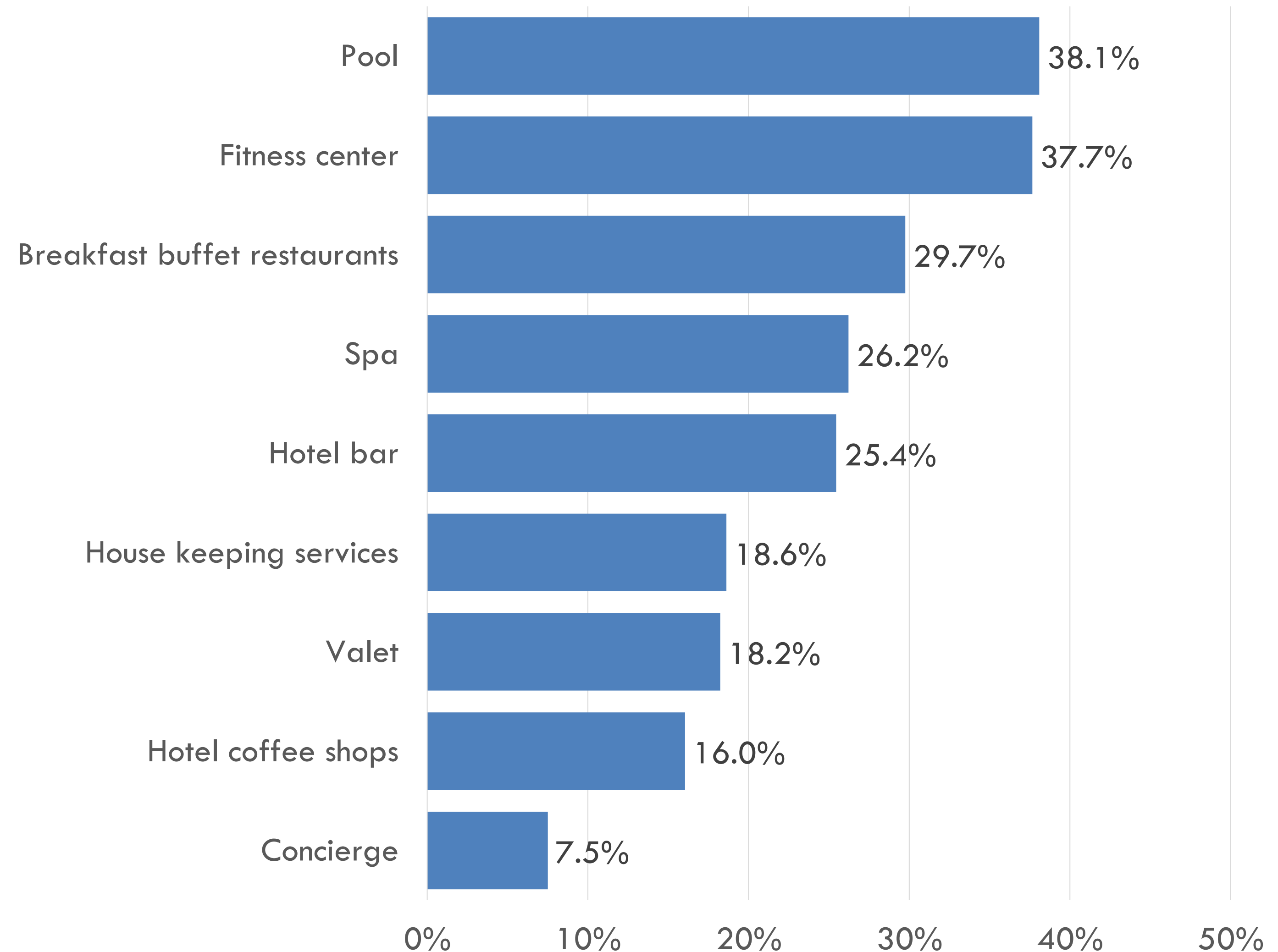
(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)



HOTEL SERVICES AVOIDED

Question: During your most recent stay at a lodging property, which of the following services did you SPECIFICALLY AVOID USING due to the Coronavirus situation? (Select all that apply)

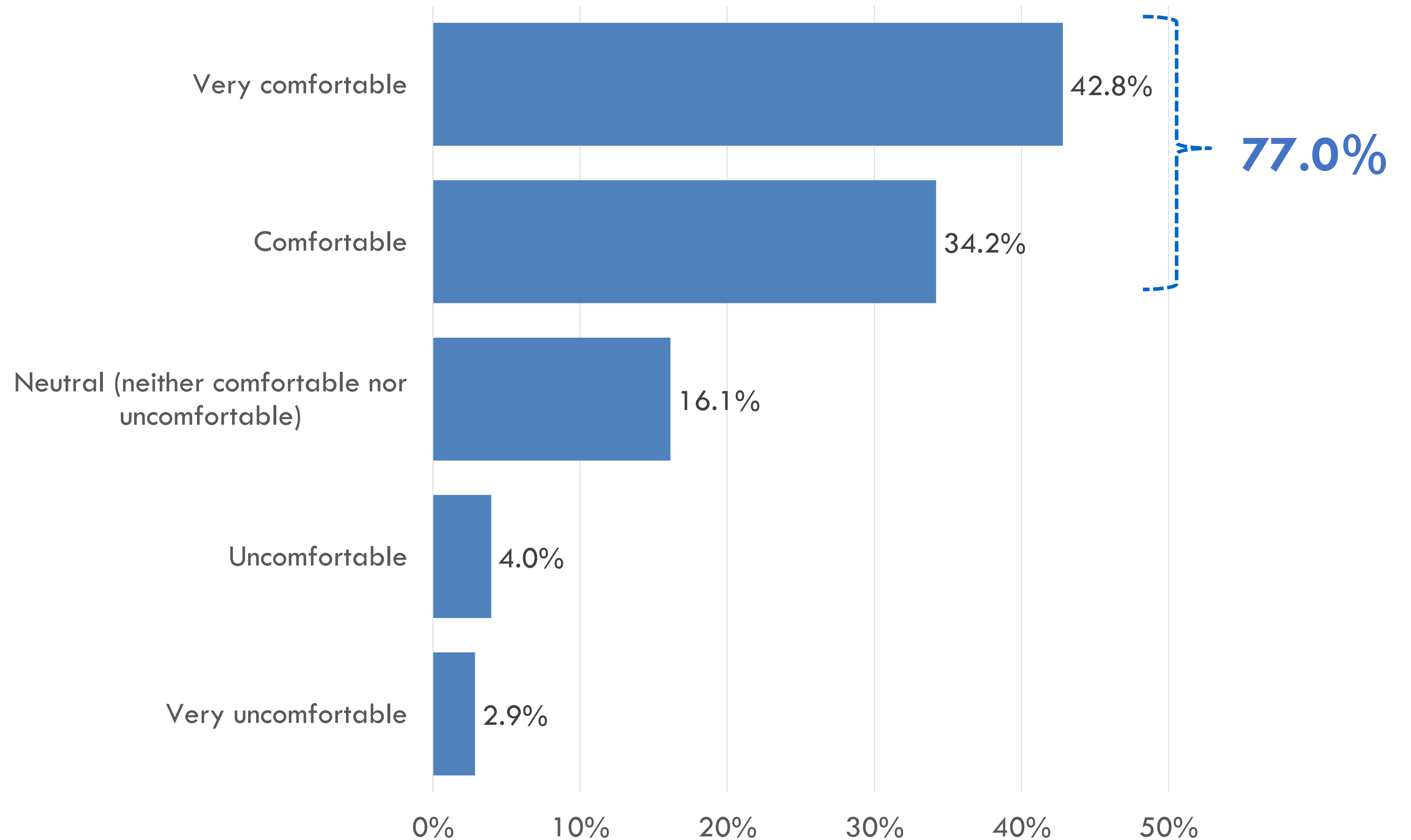
(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)



COMFORT WITH HOTEL CROWDING

Question: How comfortable were you with the number of guests you saw in public areas at the most recent lodging property in which you stayed? (Select one)

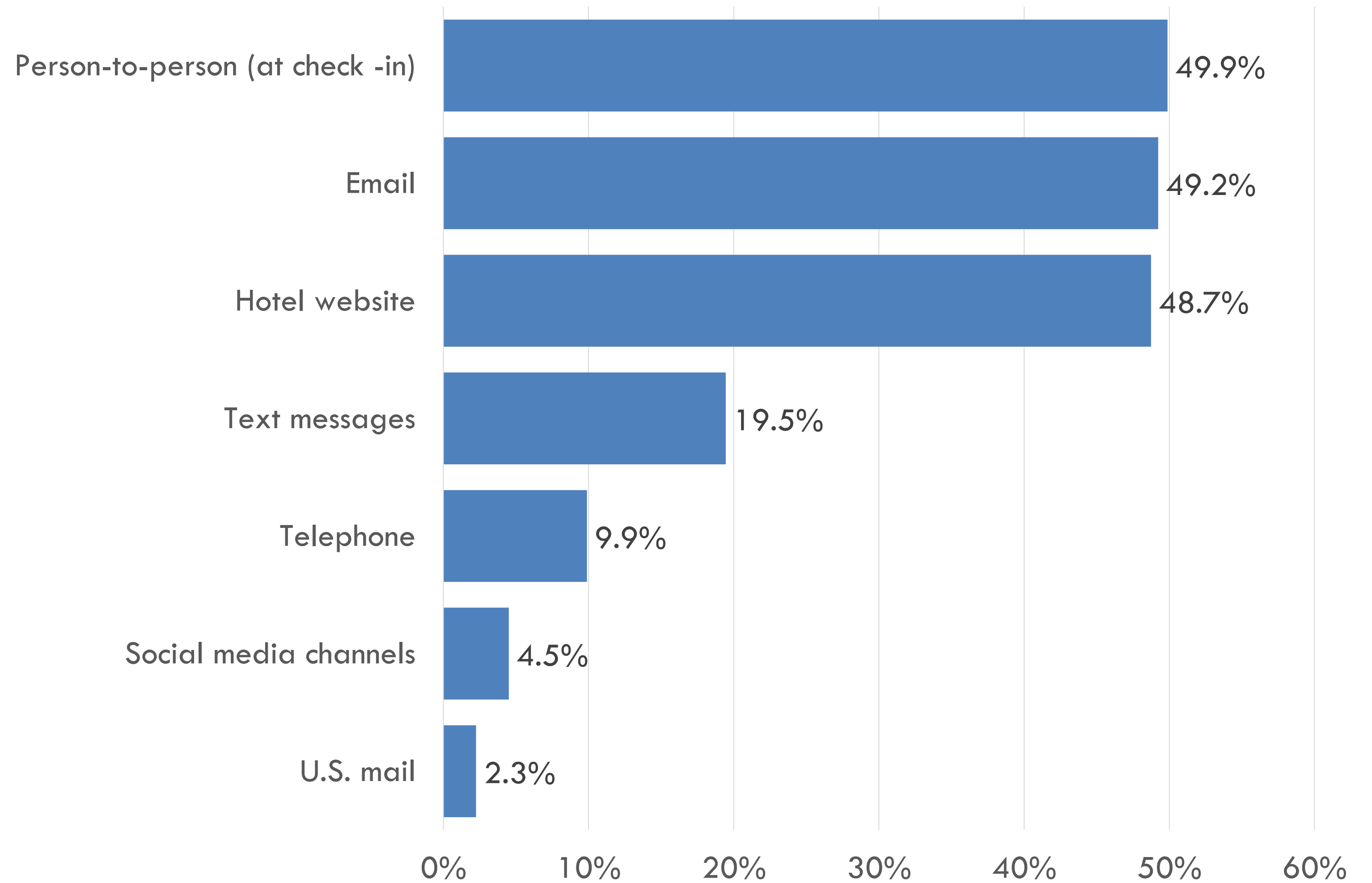
(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)



HOTEL COMMUNICATIONS

Question: How did the lodging property (or properties) you used this summer communicate their Coronavirus safety protocols to you? (Select all that apply)

(Base: Wave 27 data. Respondents staying overnight in a lodging property, 255 completed surveys. Data collected September 11-13, 2020)

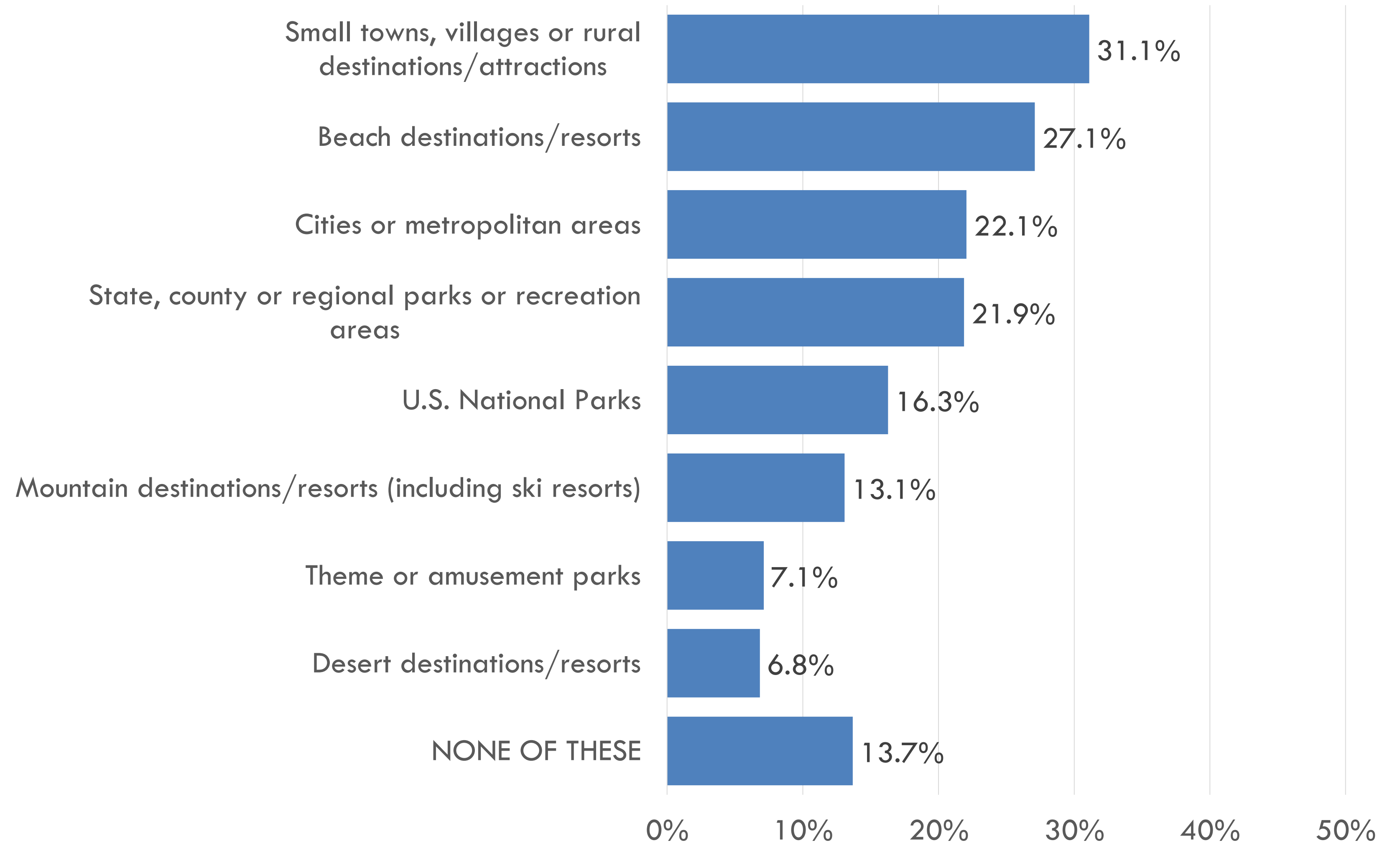


DESTINATION TYPES VISITED

Question: Which types of destinations did you visit on your most recent summer leisure trip(s)? (Select all that apply)

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys.

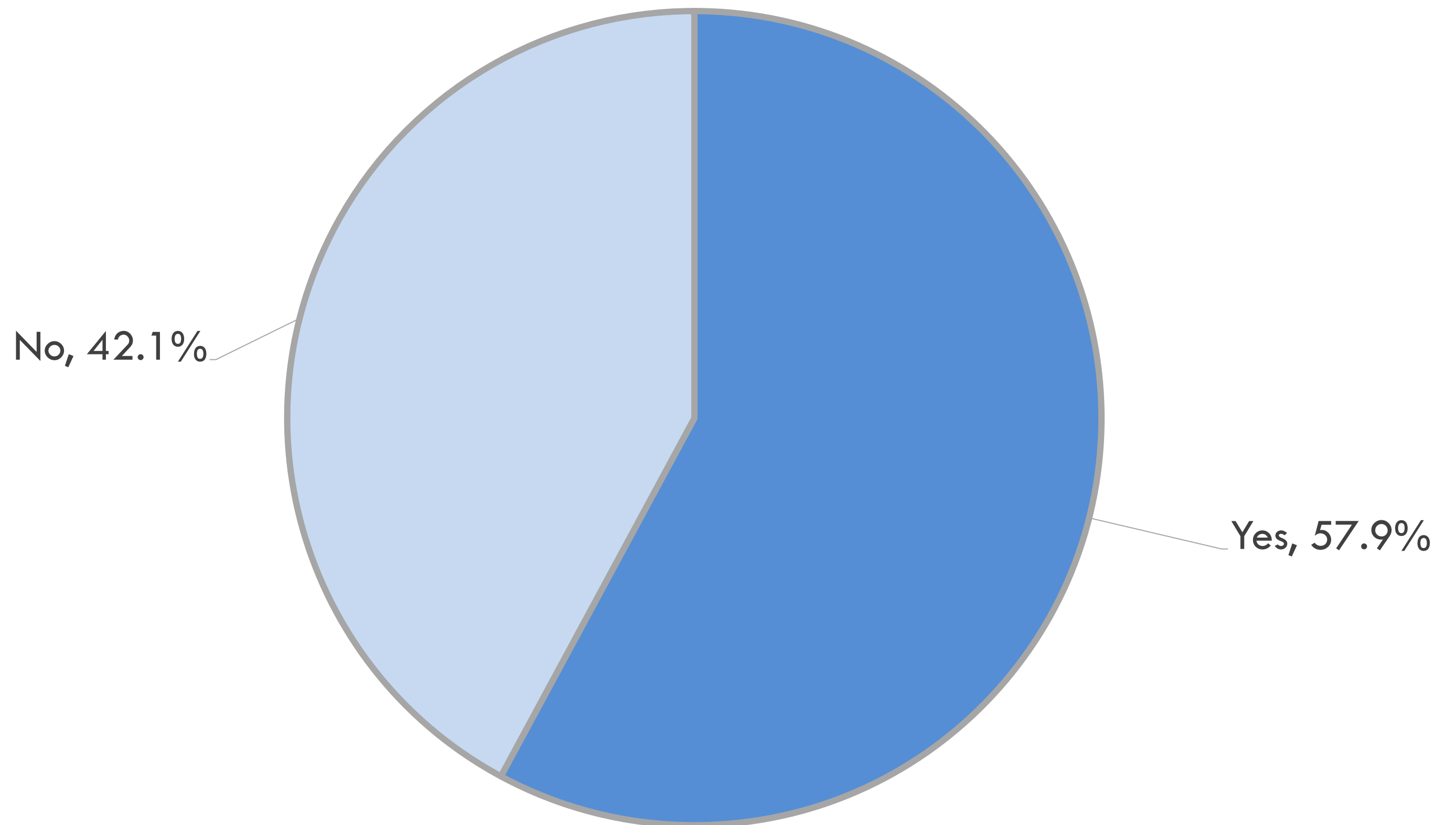
Data collected September 11-13, 2020)



RESEARCHING DESTINATION RULES AND REGULATIONS

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

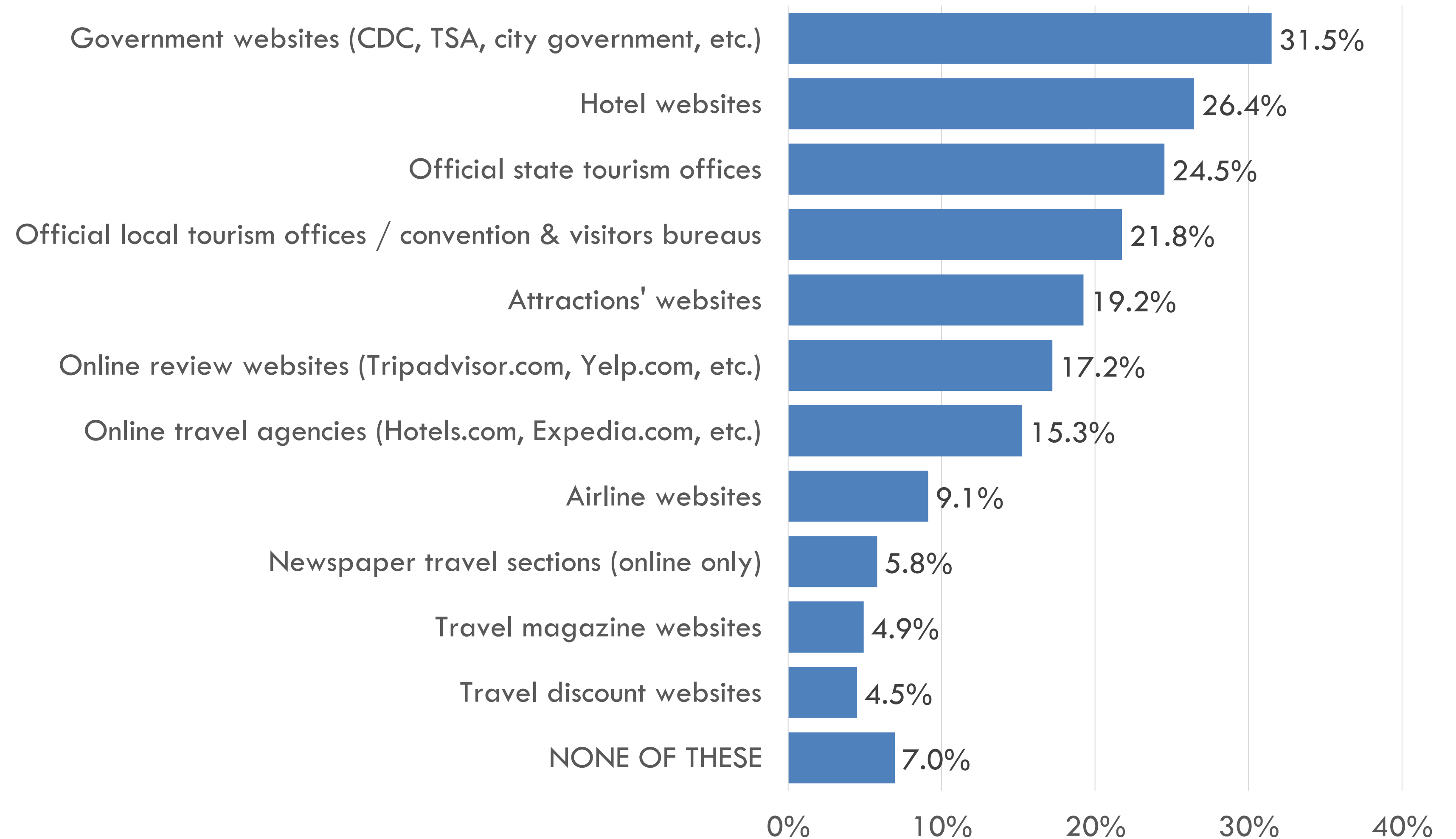
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



RESOURCES USED TO RESEARCH DESTINATION REGULATIONS

Question: Which of these resources did you use to research the Coronavirus-related rules and regulations in the destinations you visited?

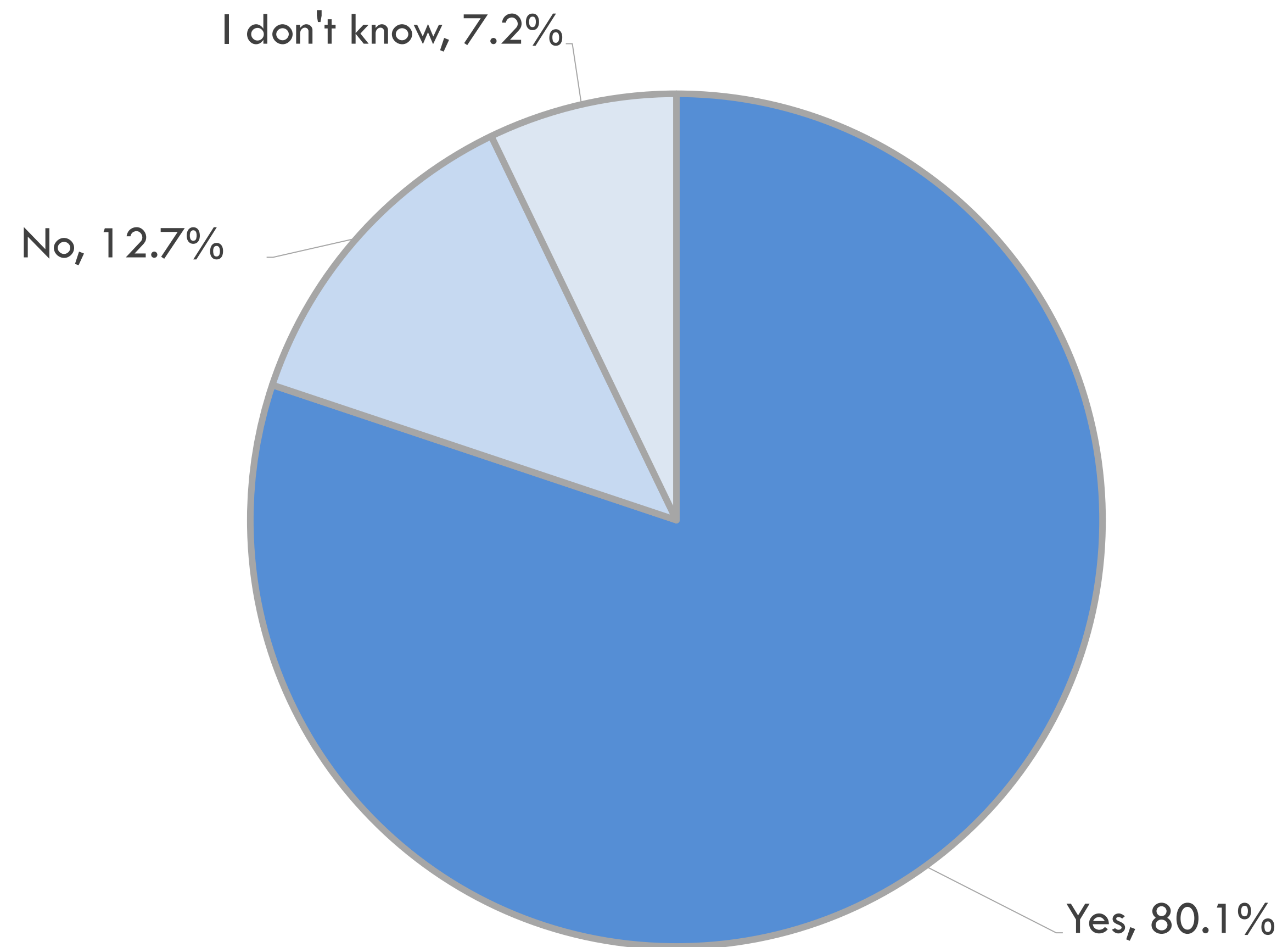
(Base: Wave 27 data. Respondents researching coronavirus-related regulations for their trip destination, 284 completed surveys. Data collected September 11-13, 2020)



MANDATORY FACEMASK REGULATIONS

Question: Did any of the destinations you visited this summer have mandatory face mask usage regulations?

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



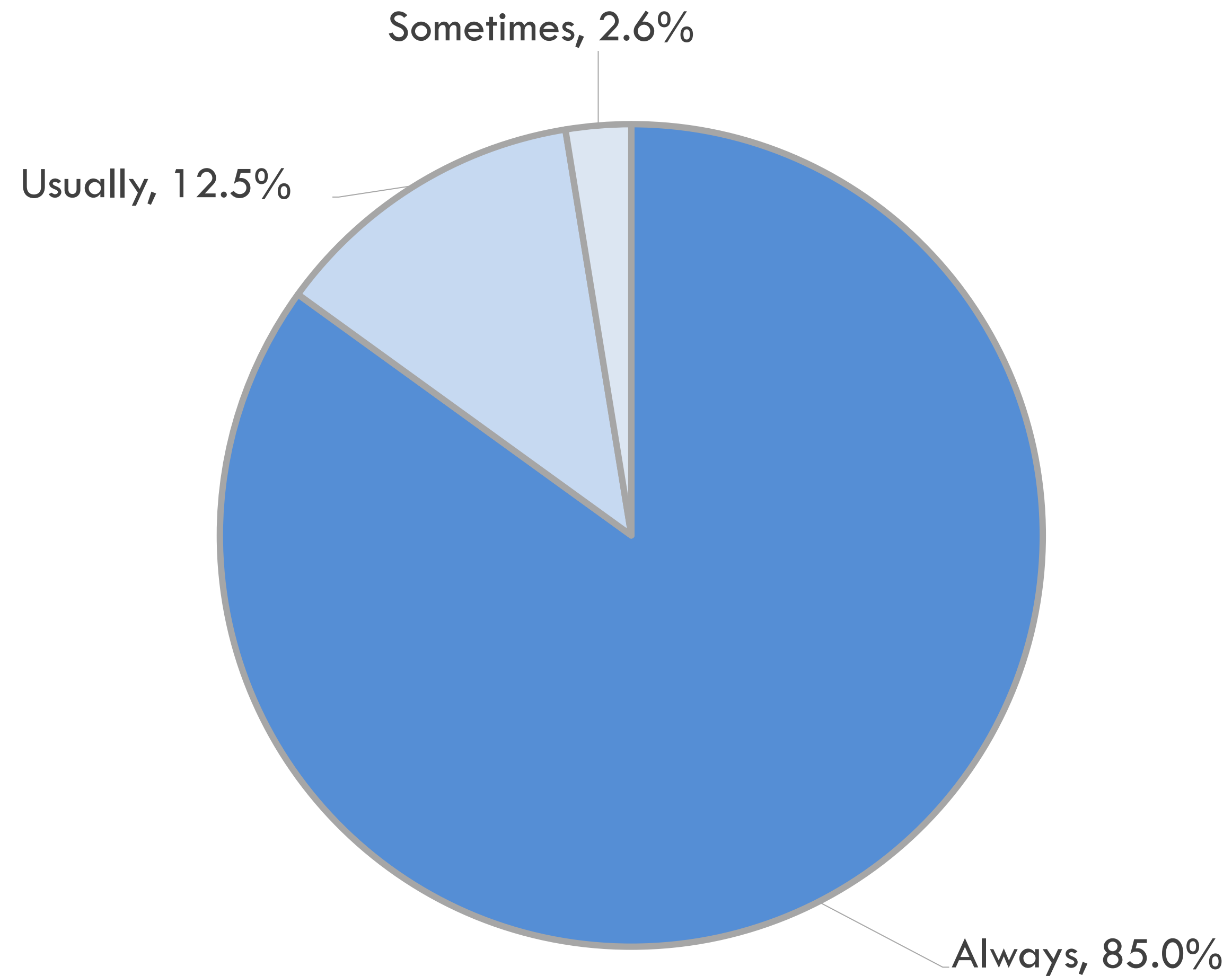
FOLLOWING MANDATORY FACEMASK REGULATIONS

Question: While in these destinations, how often did you personally follow these mandatory face mask usage regulations? (Select one to fill in the blank)

I _____ followed these face mask regulations.

(Base: Wave 27 data. Respondents taking a summer leisure trip to a destination with face mask requirements, 402 completed surveys.

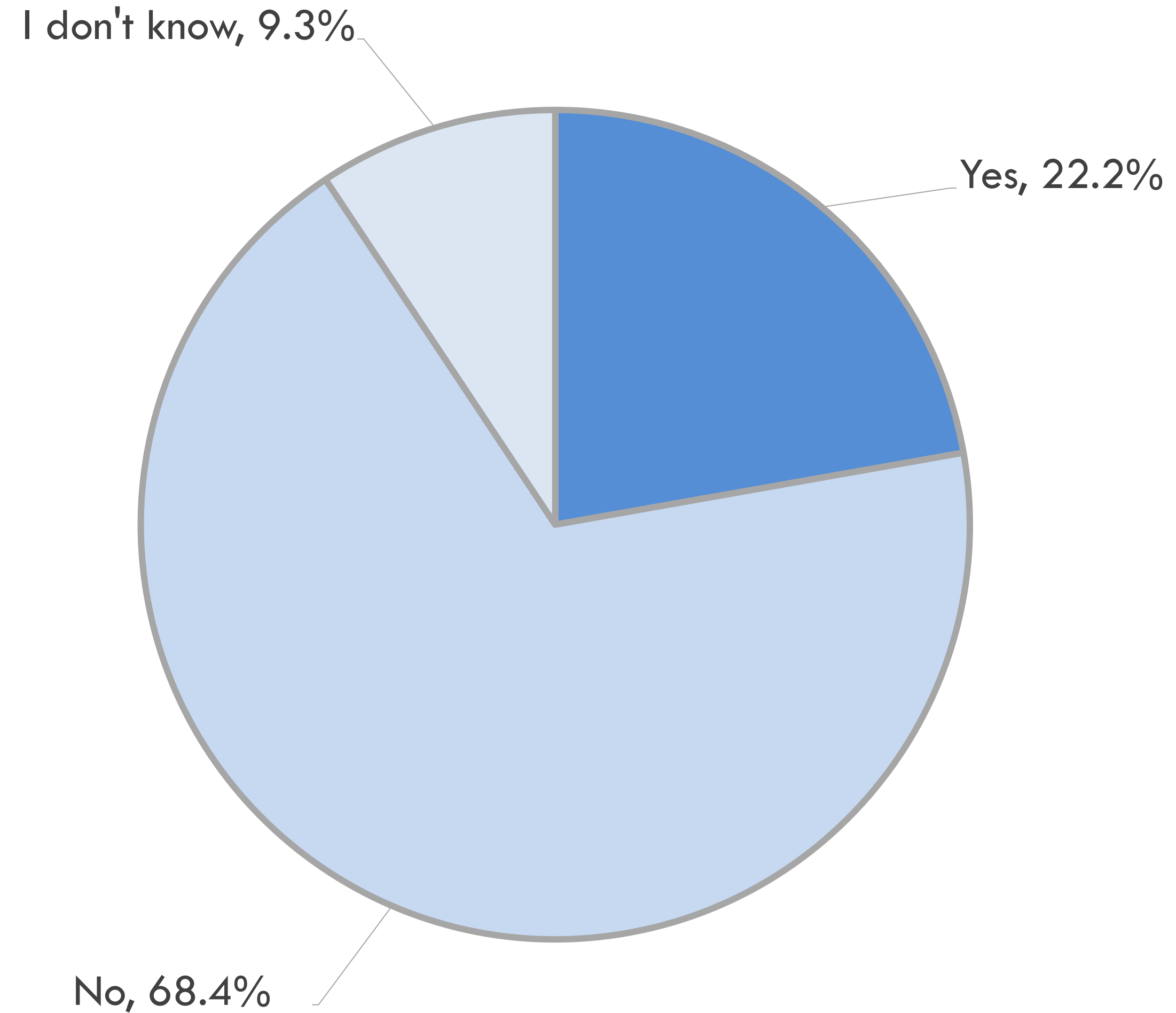
Data collected September 11-13, 2020)



MANDATORY QUARANTINE LAWS

Question: Did any of the destinations you visited this summer have mandatory quarantine regulation in place for visitors?

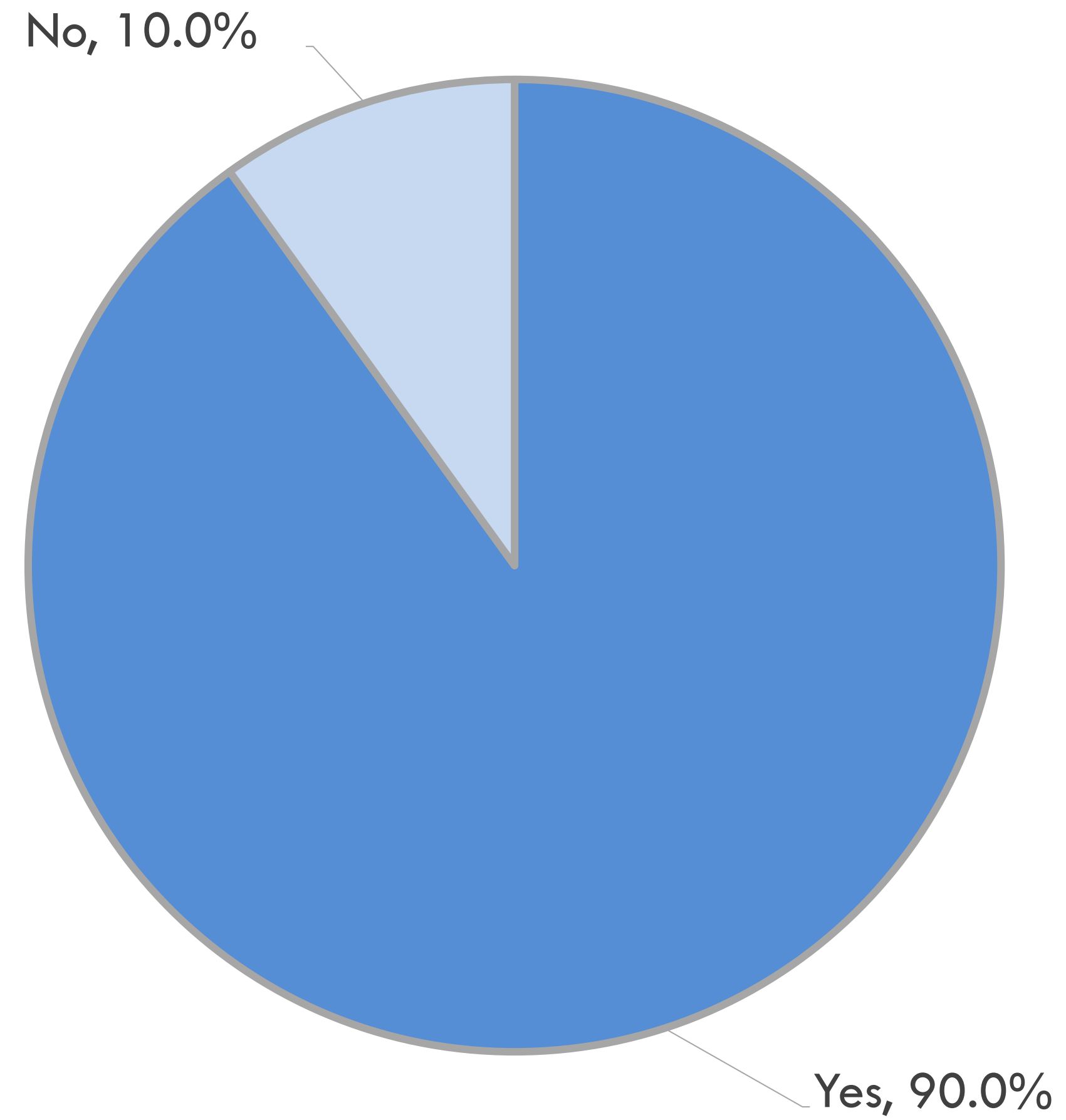
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



FOLLOWING MANDATORY QUARANTINE LAWS

Question: Did you follow these quarantine regulations?

(Base: Wave 27 data. Respondents taking a summer leisure trip to a destination with quarantine laws in place, 112 completed surveys. Data collected September 11-13, 2020)



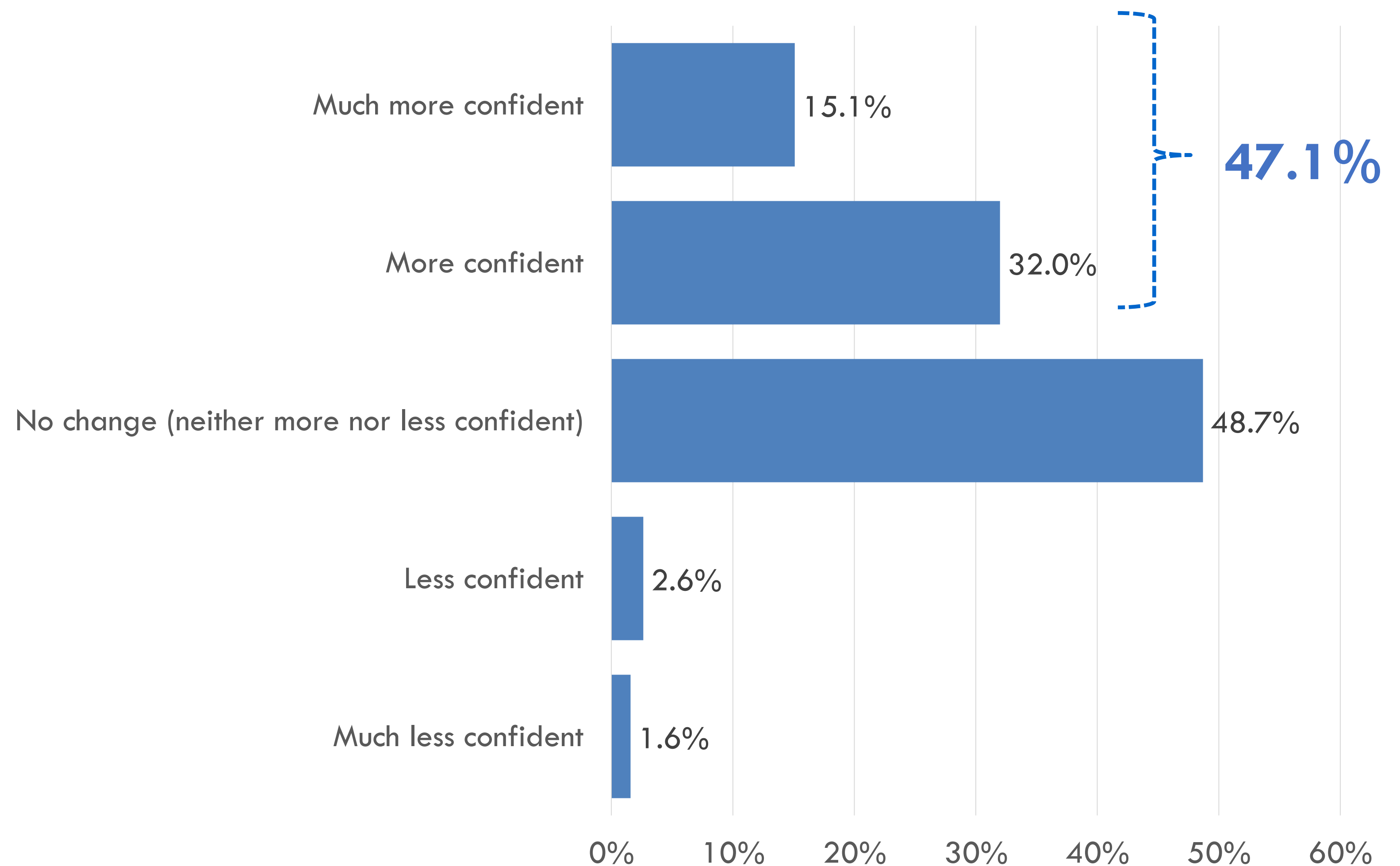
CONFIDENCE BUILDING

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

My experiences on my summer leisure trip(s) have made me _____ I can travel safely.

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys.

Data collected September 11-13, 2020)

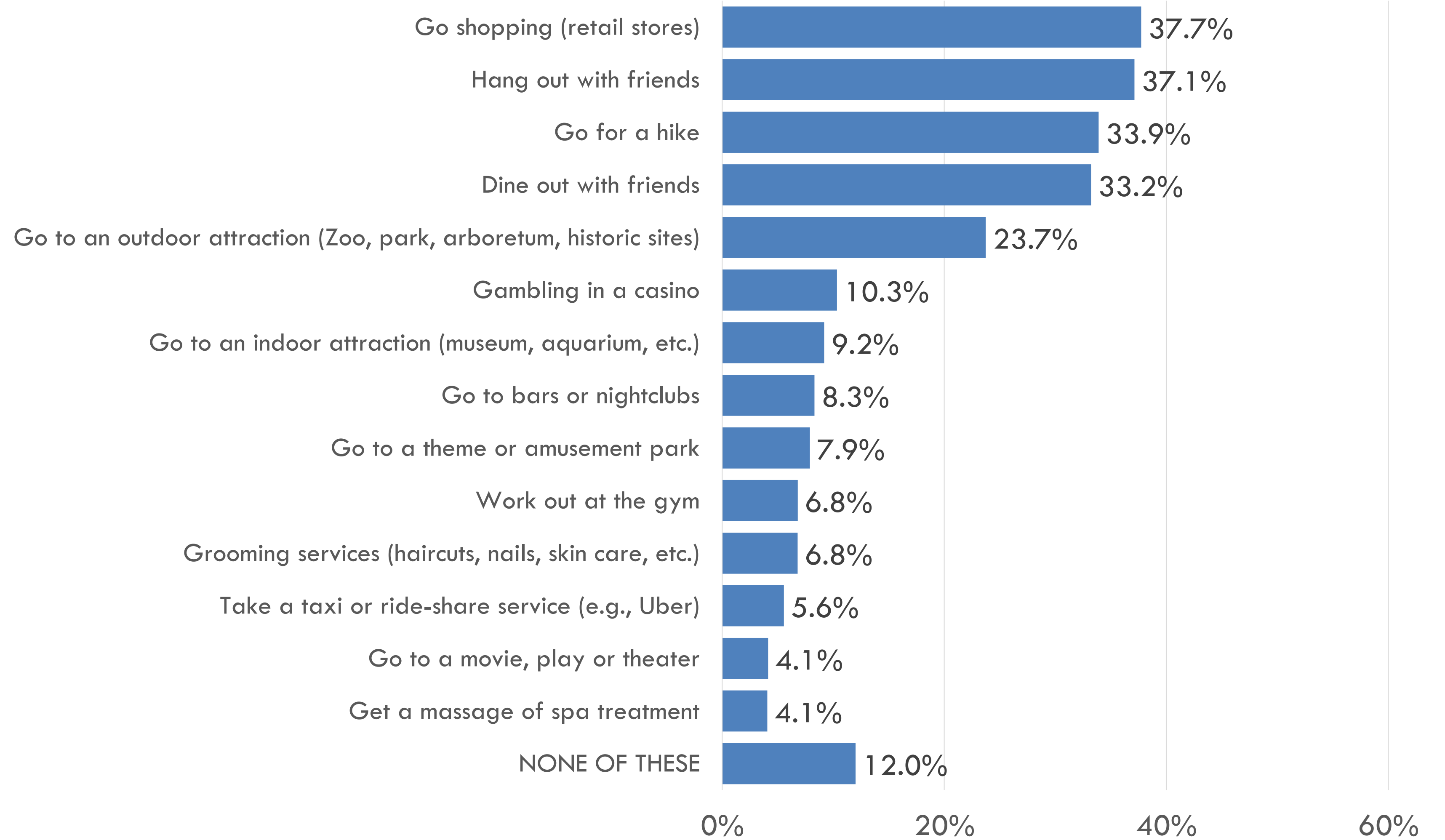


SUMMER TRAVEL ACTIVITIES

Question: Which of the following did you do while traveling this summer? (Select all that apply)

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys.

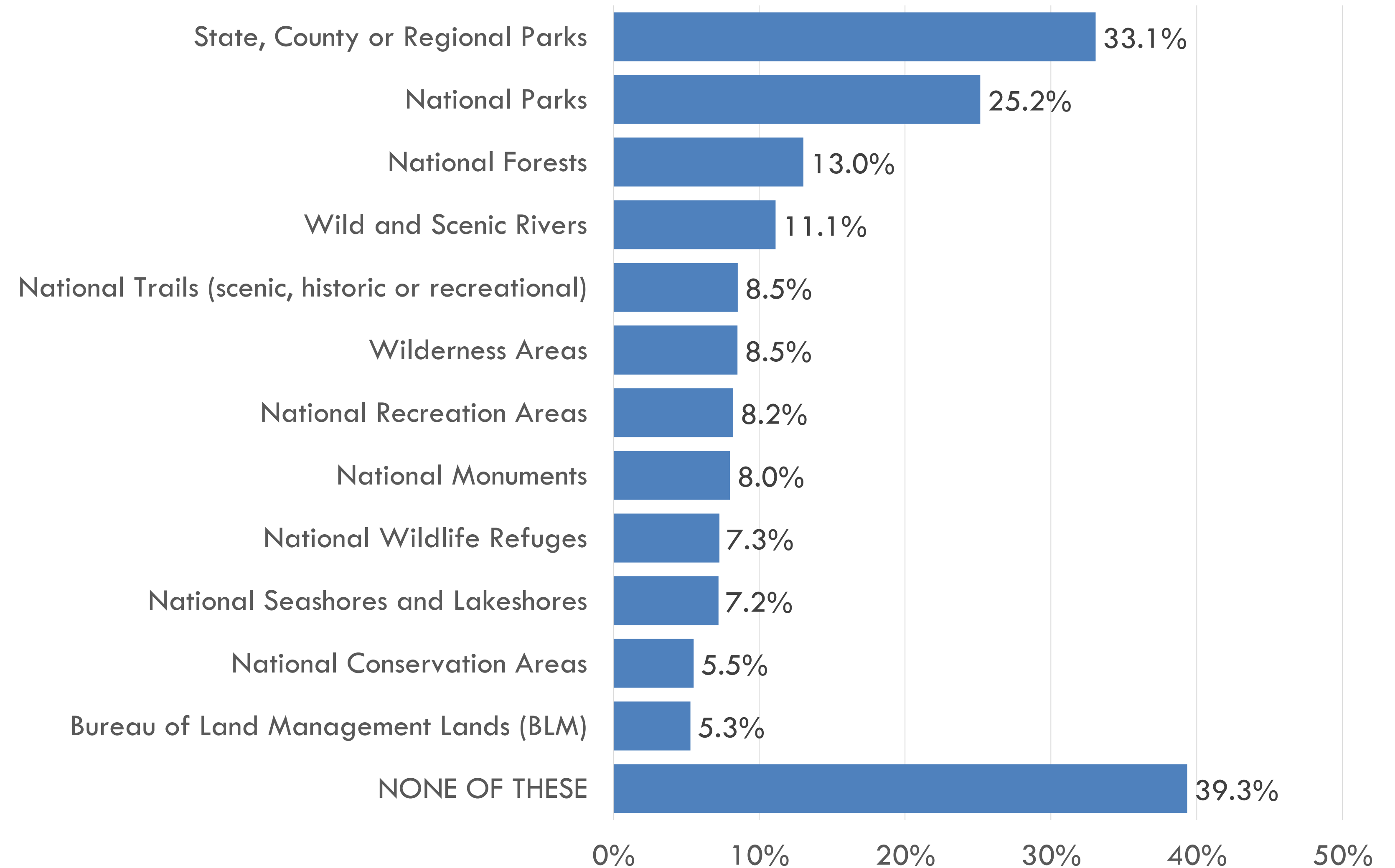
Data collected September 11-13, 2020)



VISITING PUBLIC LANDS

Question: On any of your leisure trips this summer did you visit any of the following types of public lands? (Select all that apply)

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)

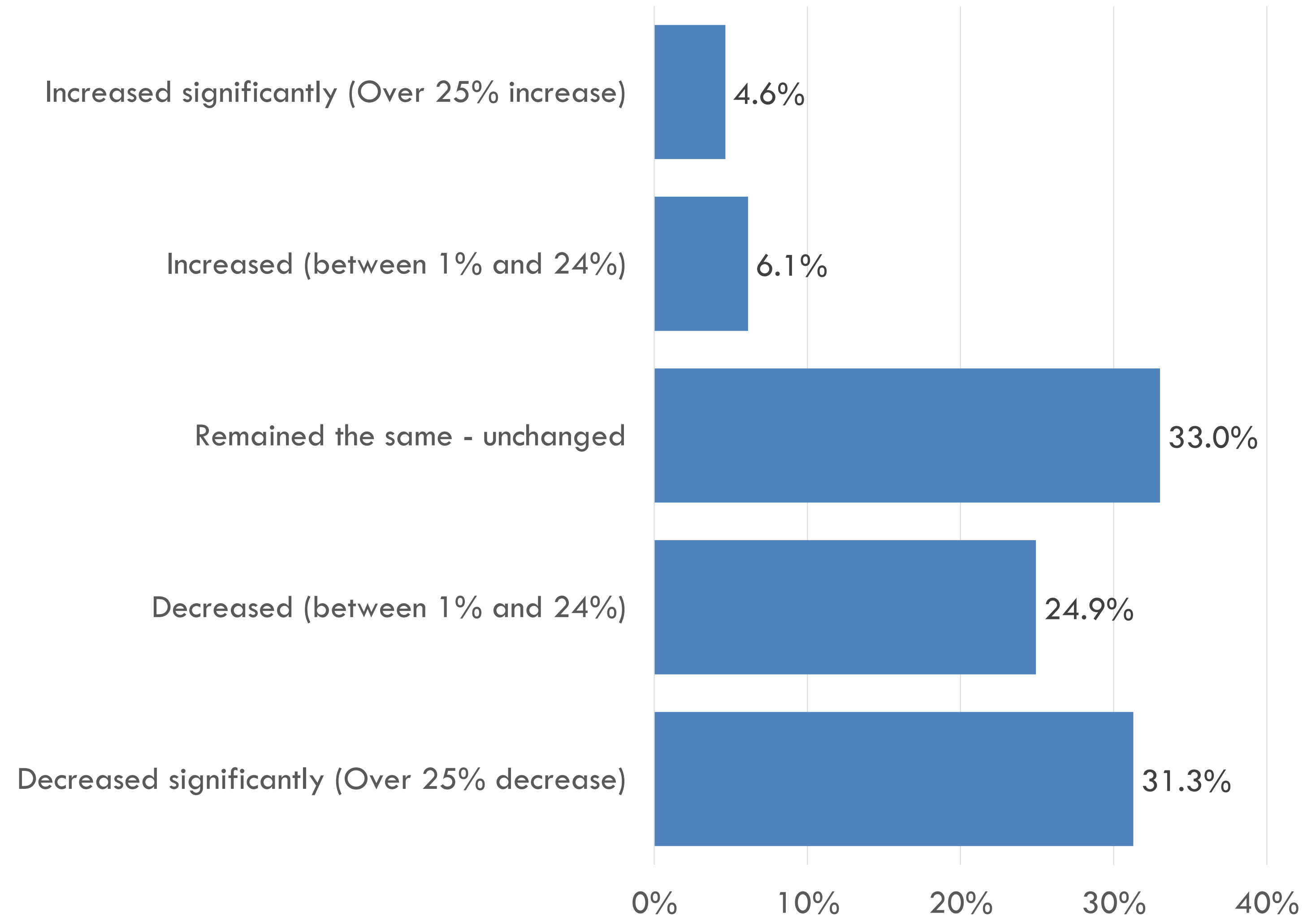


CORONAVIRUS' IMPACT ON SPENDING

Question: In what way (if any) has the Coronavirus situation changed the amount you spent while on your summer trip(s)? (Select one to complete the sentence)

My spending while on leisure trips this summer

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)

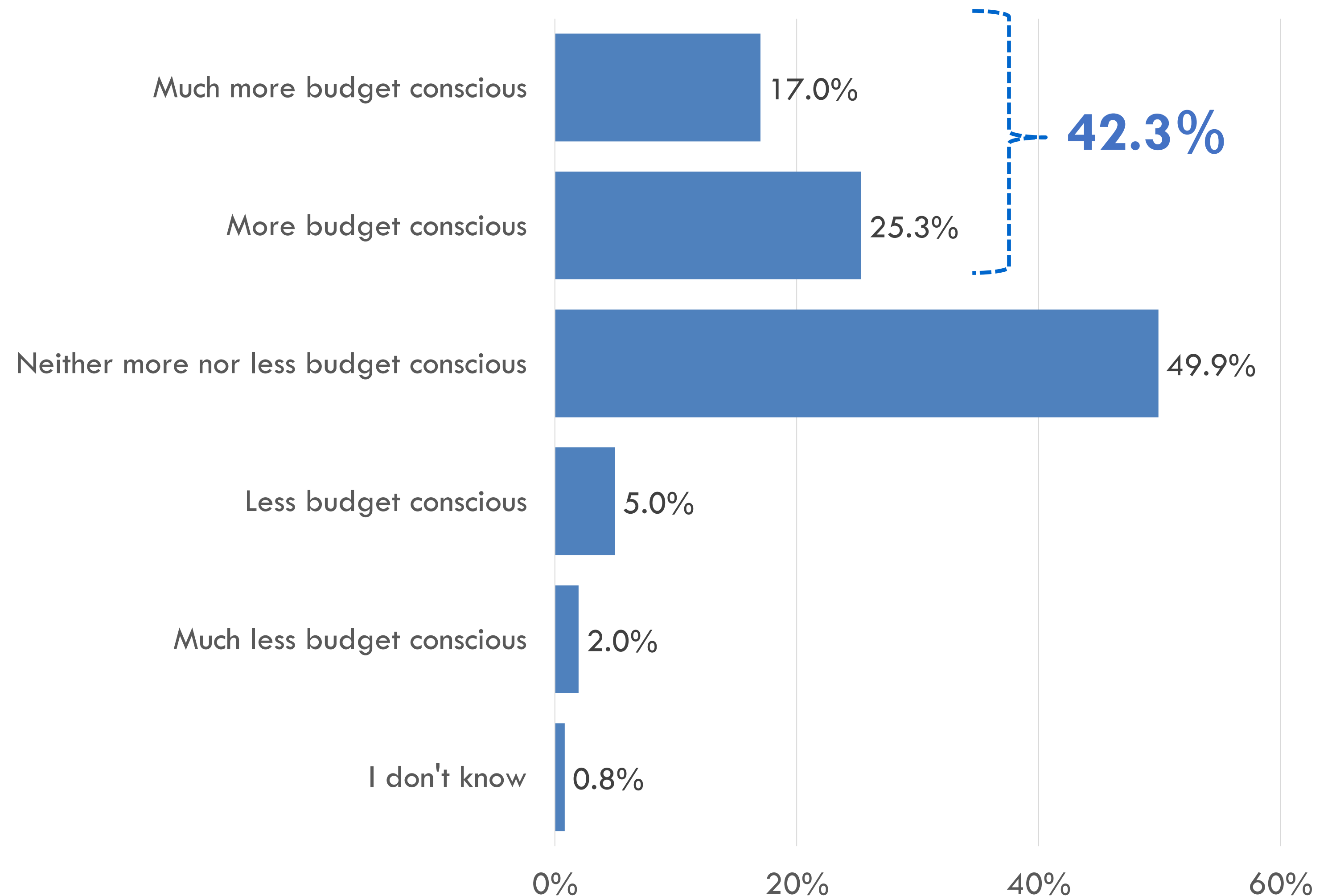


CORONAVIRUS' IMPACT ON BUDGETING

Question: Continuing to think about your travel spending this summer. Compared to before the Coronavirus situation, how budget conscious were you while traveling this summer?

This summer while traveling I was _____

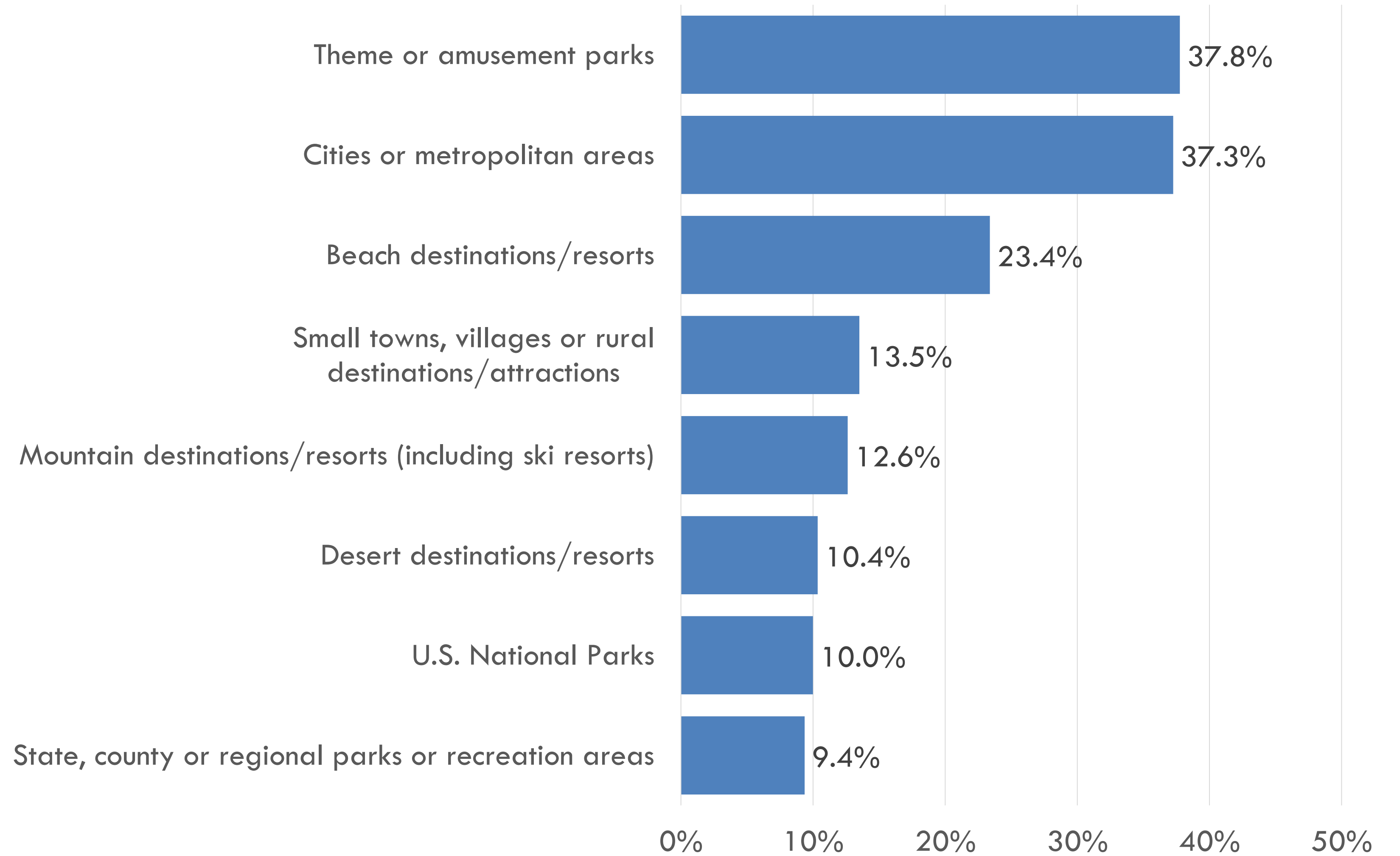
(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



DESTINATION TYPES AVOIDED

Question: Did you SPECIFICALLY AVOID any of these destination types this summer due to the Coronavirus situation? (Select all that apply)

(Base: Wave 27 data. Respondents taking a summer leisure trip, 498 completed surveys. Data collected September 11-13, 2020)



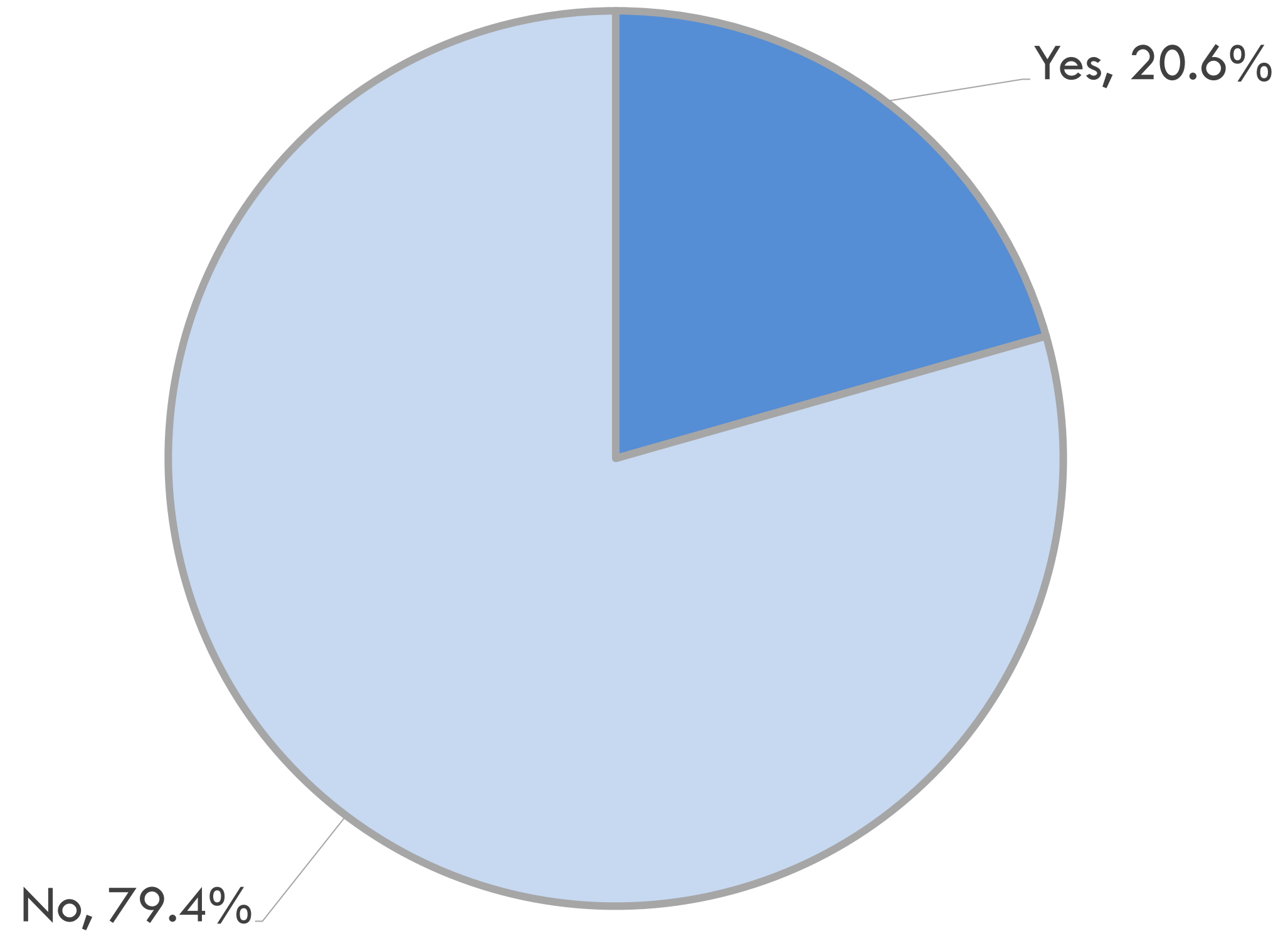
A woman with blonde hair, wearing sunglasses and a white tank top, is sitting on a striped lawn chair on a grassy lawn. She is holding a glass of red liquid with a straw. To her left is a large blue suitcase. Behind her is a large, colorful inflatable ring. The scene is set outdoors with green curtains and a potted plant in the background. The text "SUMMER 2020 STAYCATIONS" is overlaid in the center of the image.

SUMMER 2020 STAYCATIONS

STAYCATIONS TAKEN

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

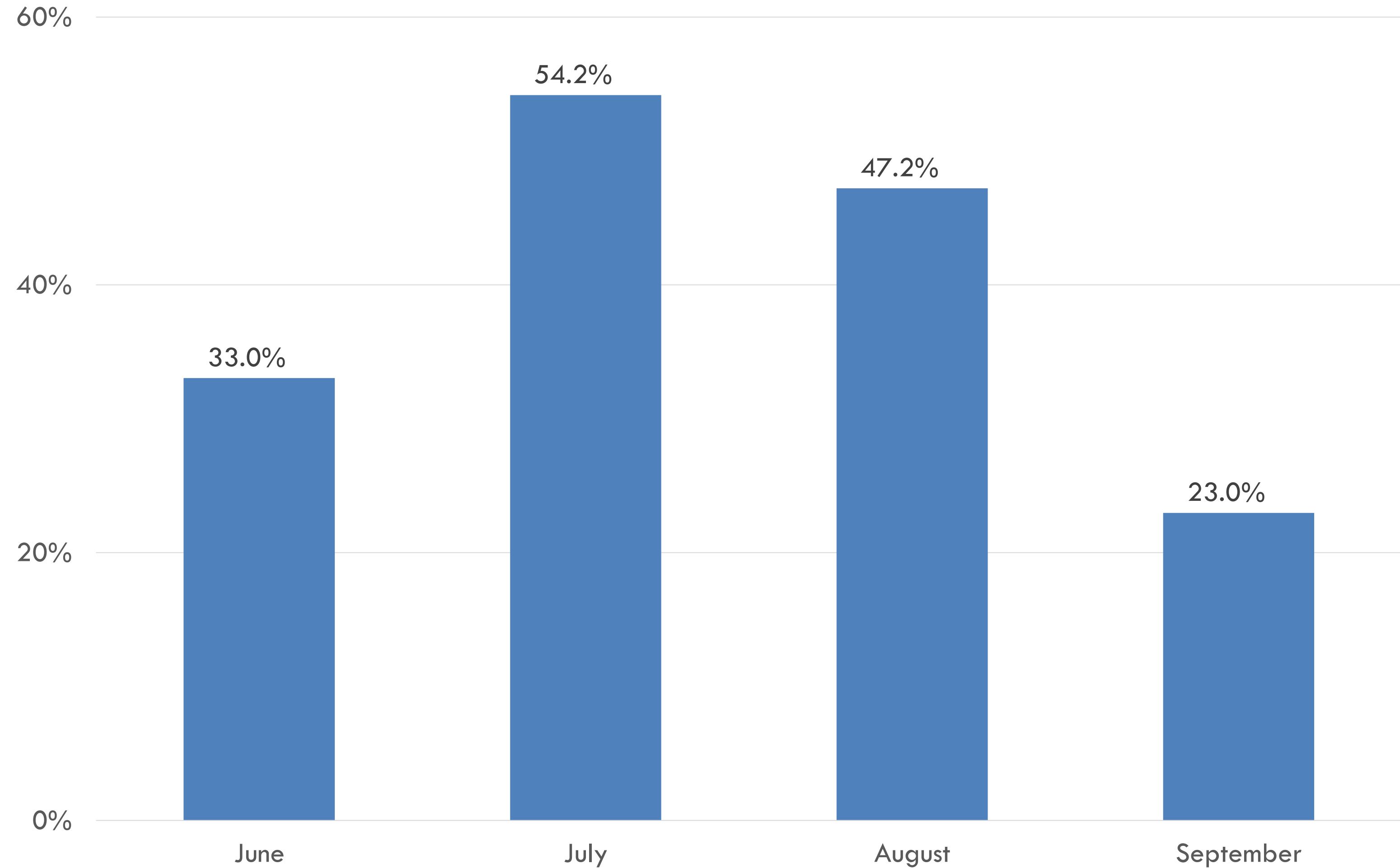
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



MONTHS STAYCATIONS WERE TAKEN

Question: In which summer month(s) did you take a staycation? (Select all that apply)

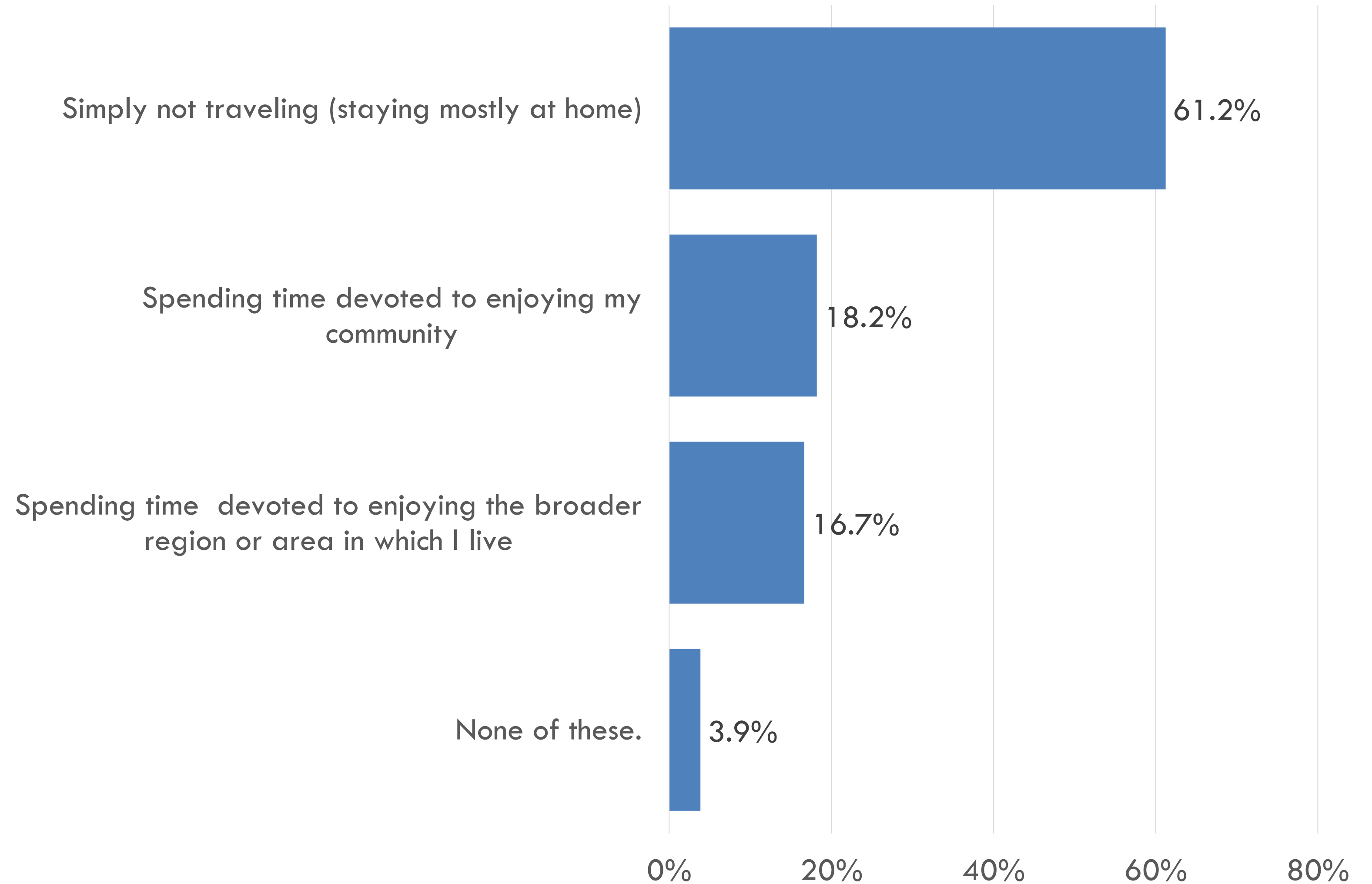
(Base: Wave 27 data. Respondents taking a summer staycation, 252 completed surveys. Data collected September 11-13, 2020)



DESCRIPTION OF STAYCATIONS TAKEN

Question: Which best describes the most recent staycation you took this summer?

(Base: Wave 27 data. Respondents taking a summer staycation, 252 completed surveys. Data collected September 11-13, 2020)

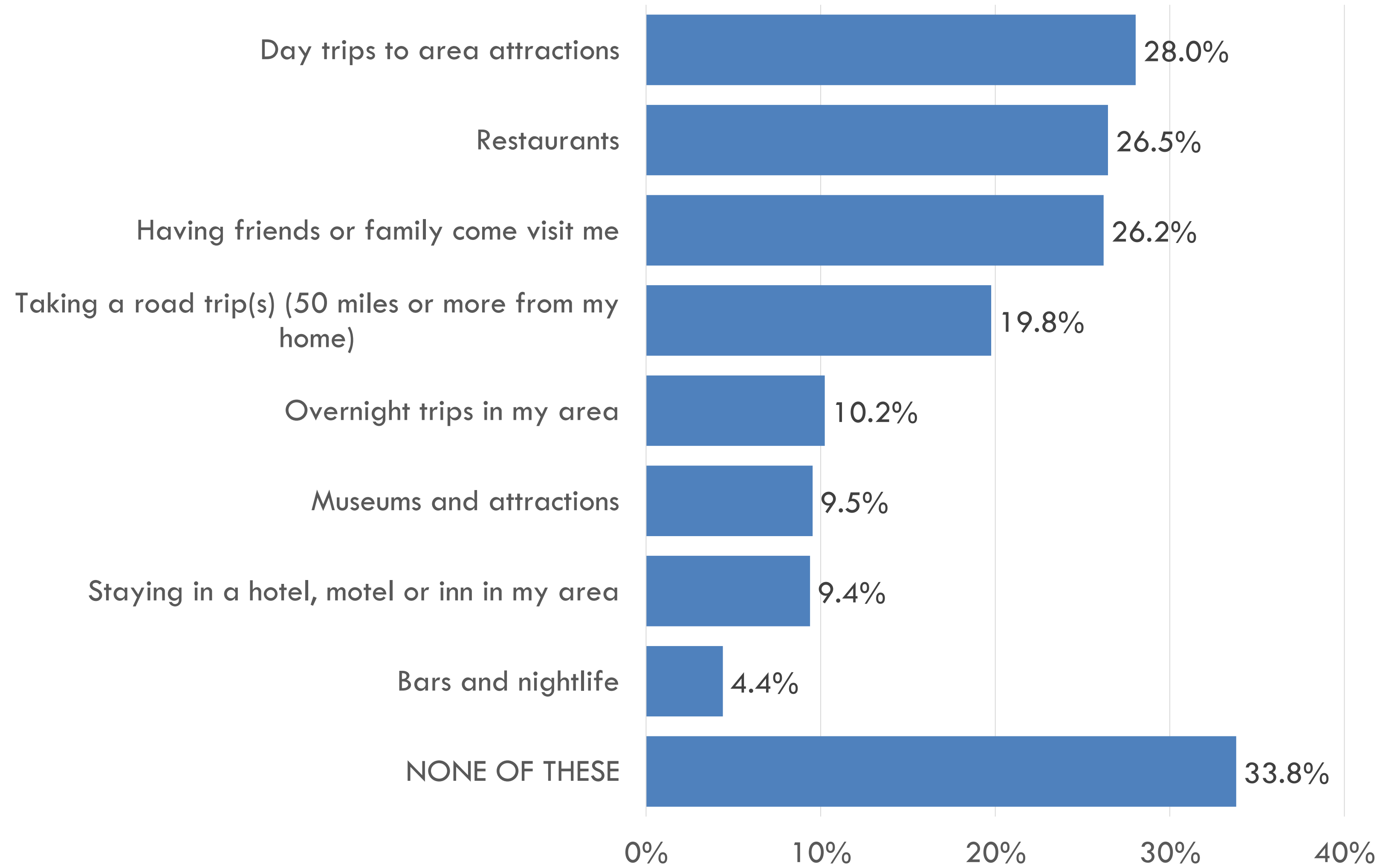


ACTIVITIES ON STAYCATIONS

Question: Which of the following did you do while on a staycation this summer? (Select all that apply)

(Base: Wave 27 data. Respondents taking a summer staycation, 252 completed surveys.

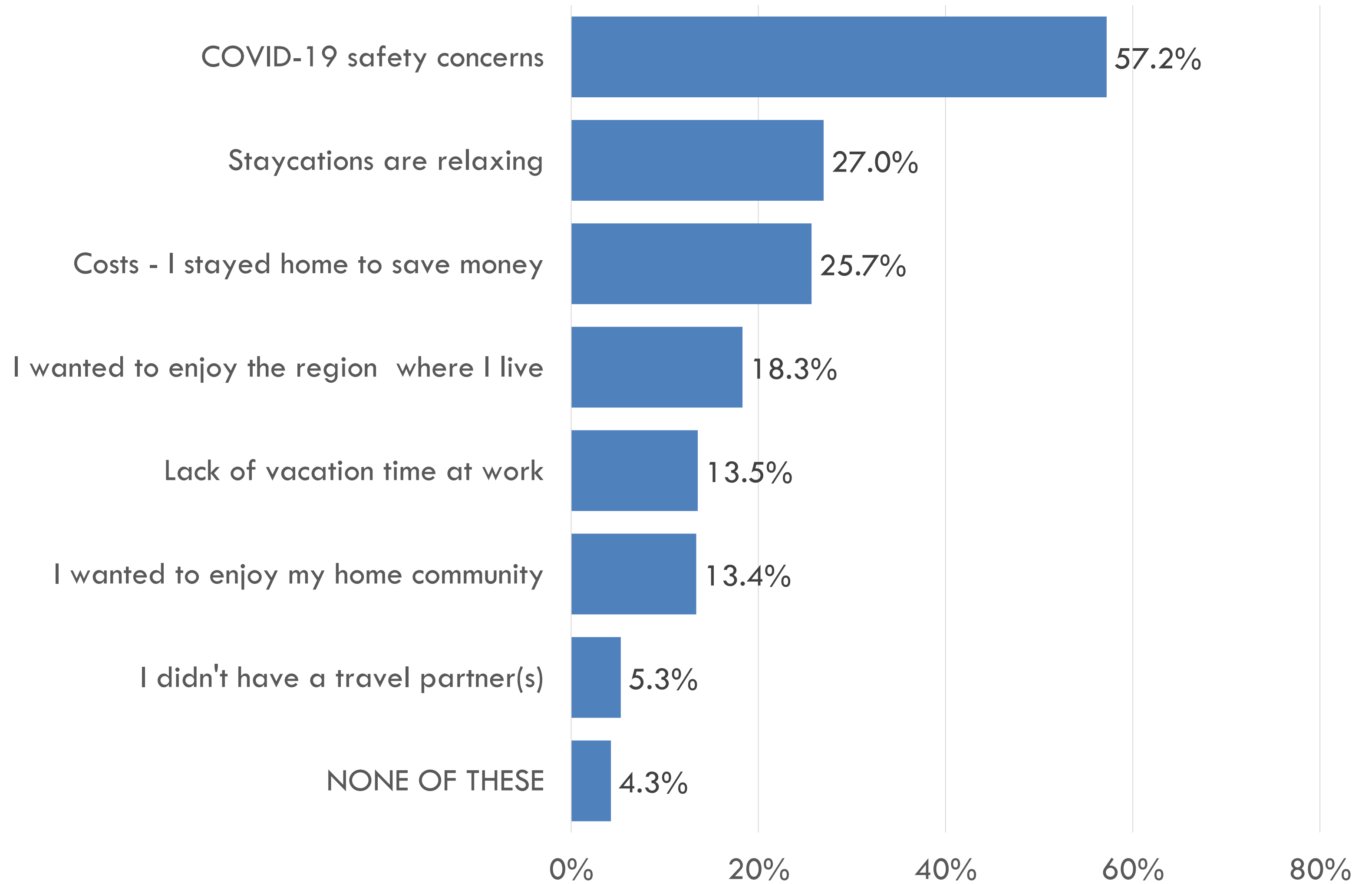
Data collected September 11-13, 2020)



MOTIVATIONS FOR TAKING A STAYCATION

Question: Which of these motivated you to take a staycation rather than traveling away from your home? (Select all that apply)

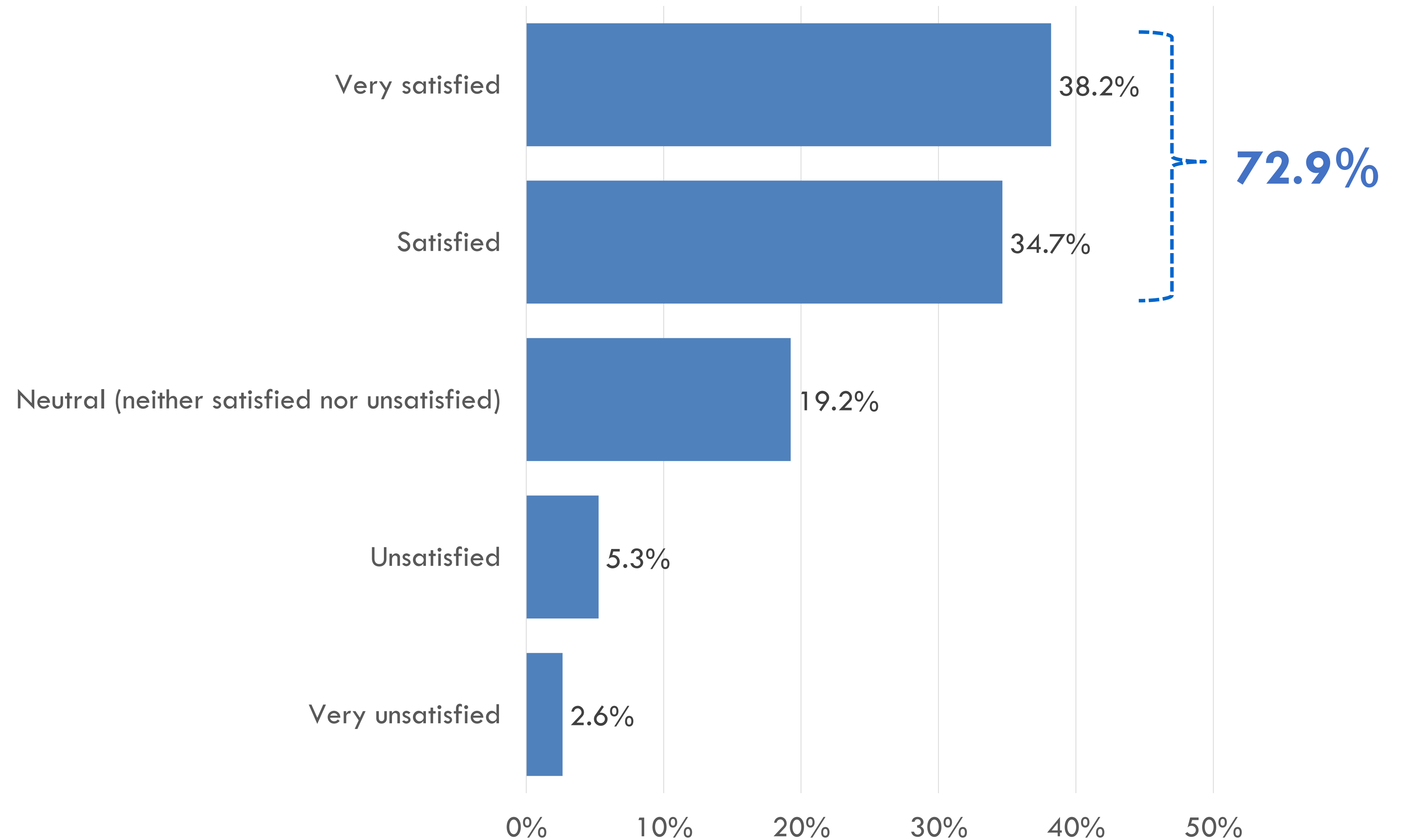
(Base: Wave 27 data. Respondents taking a summer staycation, 252 completed surveys.
Data collected September 11-13, 2020)



SATISFACTION WITH STAYCATION DECISION

Question: In general, how satisfied are you with your decision to take a staycation rather than traveling this summer? (Select one)

(Base: Wave 27 data. Respondents taking a summer staycation, 252 completed surveys. Data collected September 11-13, 2020)

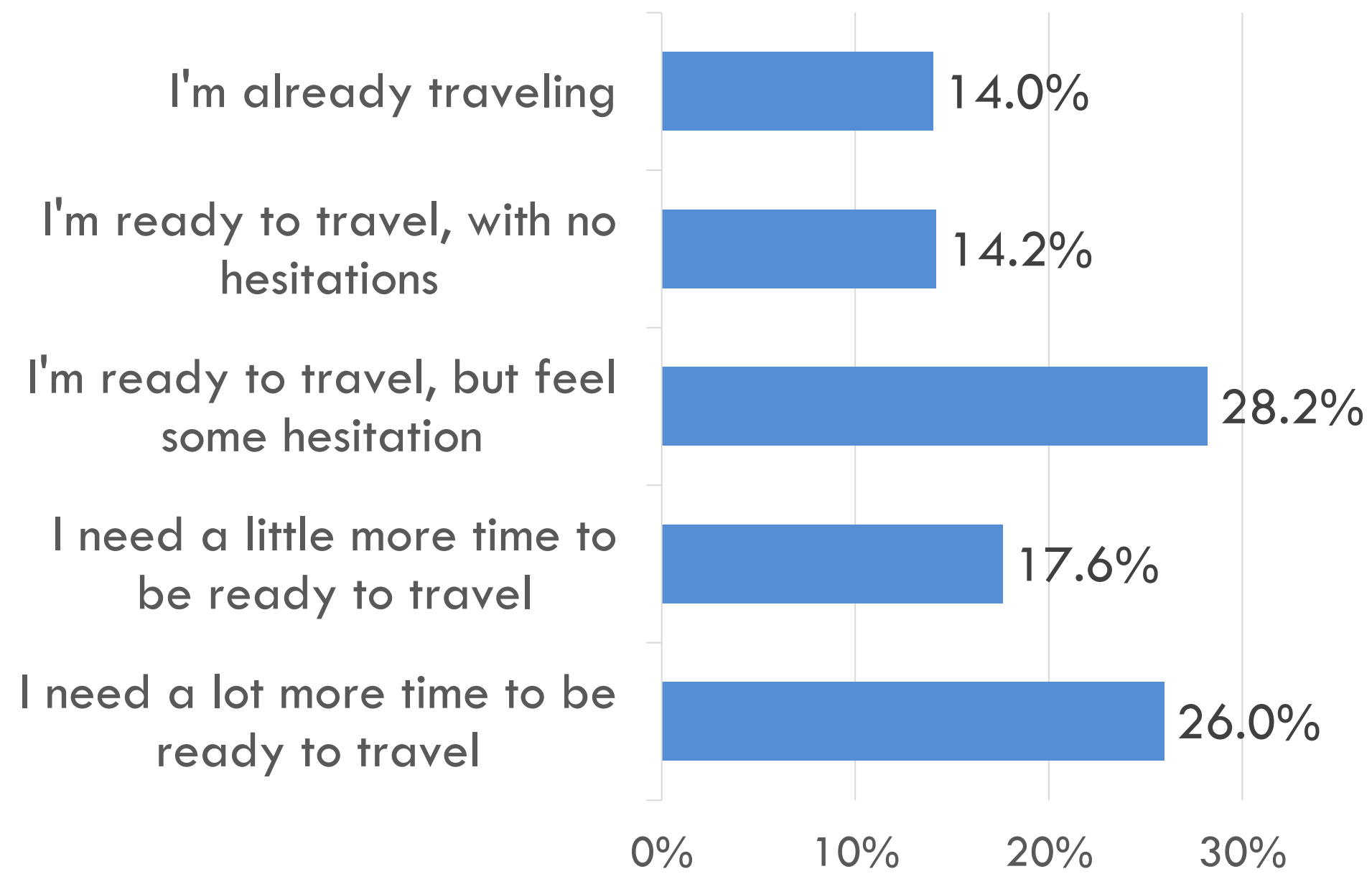




**OPINIONS ON TRAVEL &
THE CORONAVIRUS**

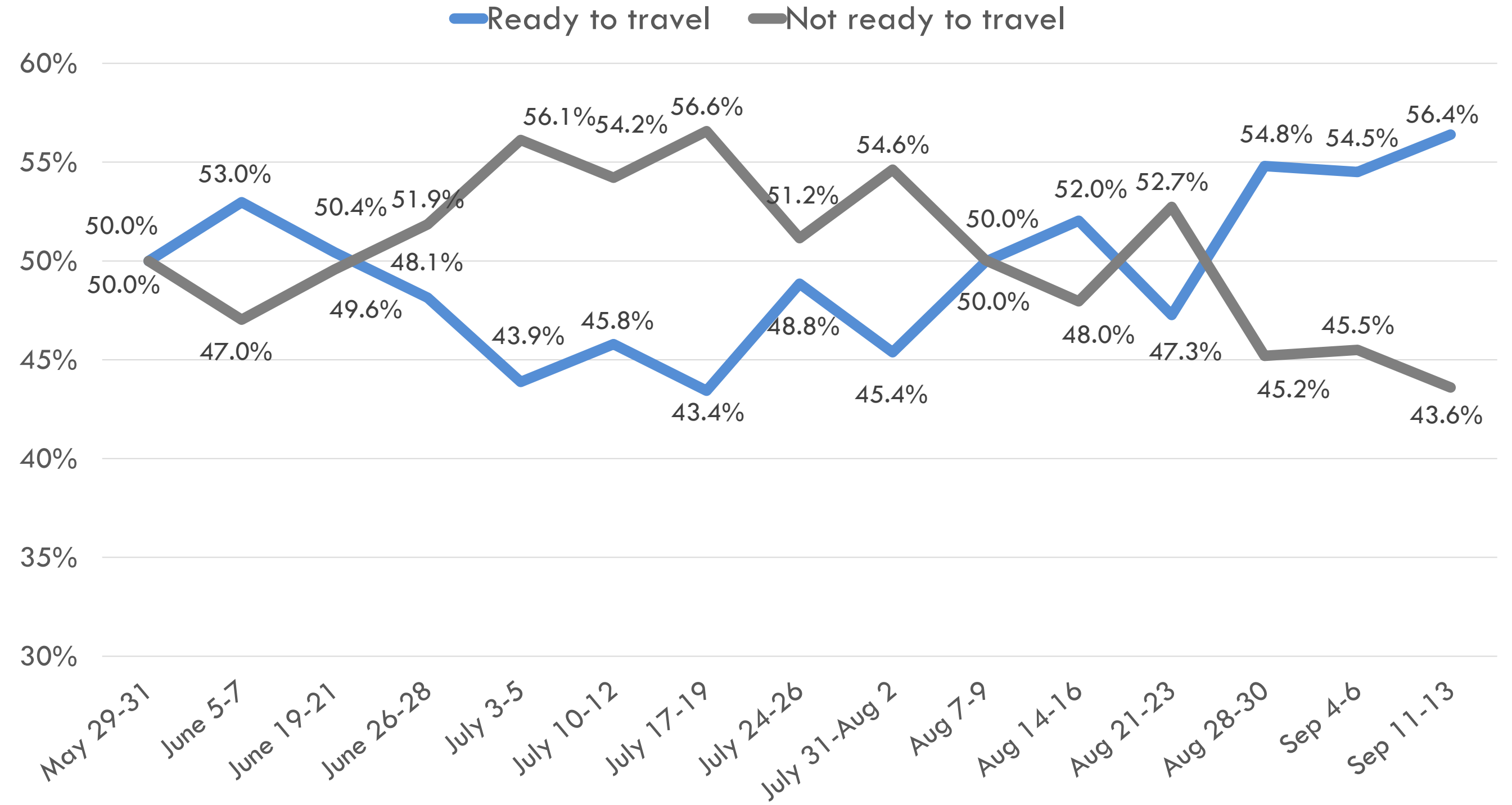
TRAVEL STATE-OF-MIND

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



(Base: Waves 12-13 and 15-27. 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, 1,225 and 1,205 completed surveys.)

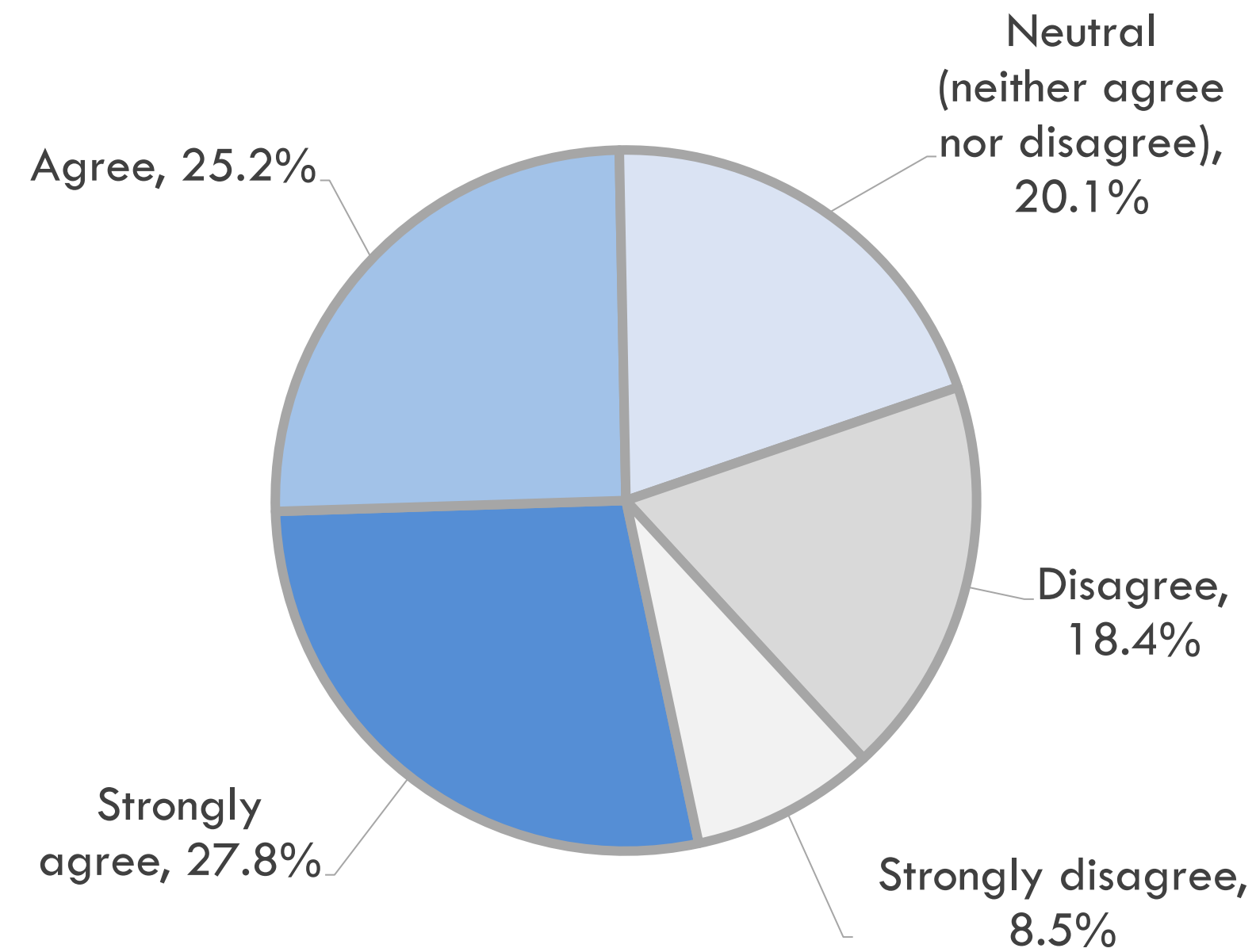
Historical data



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

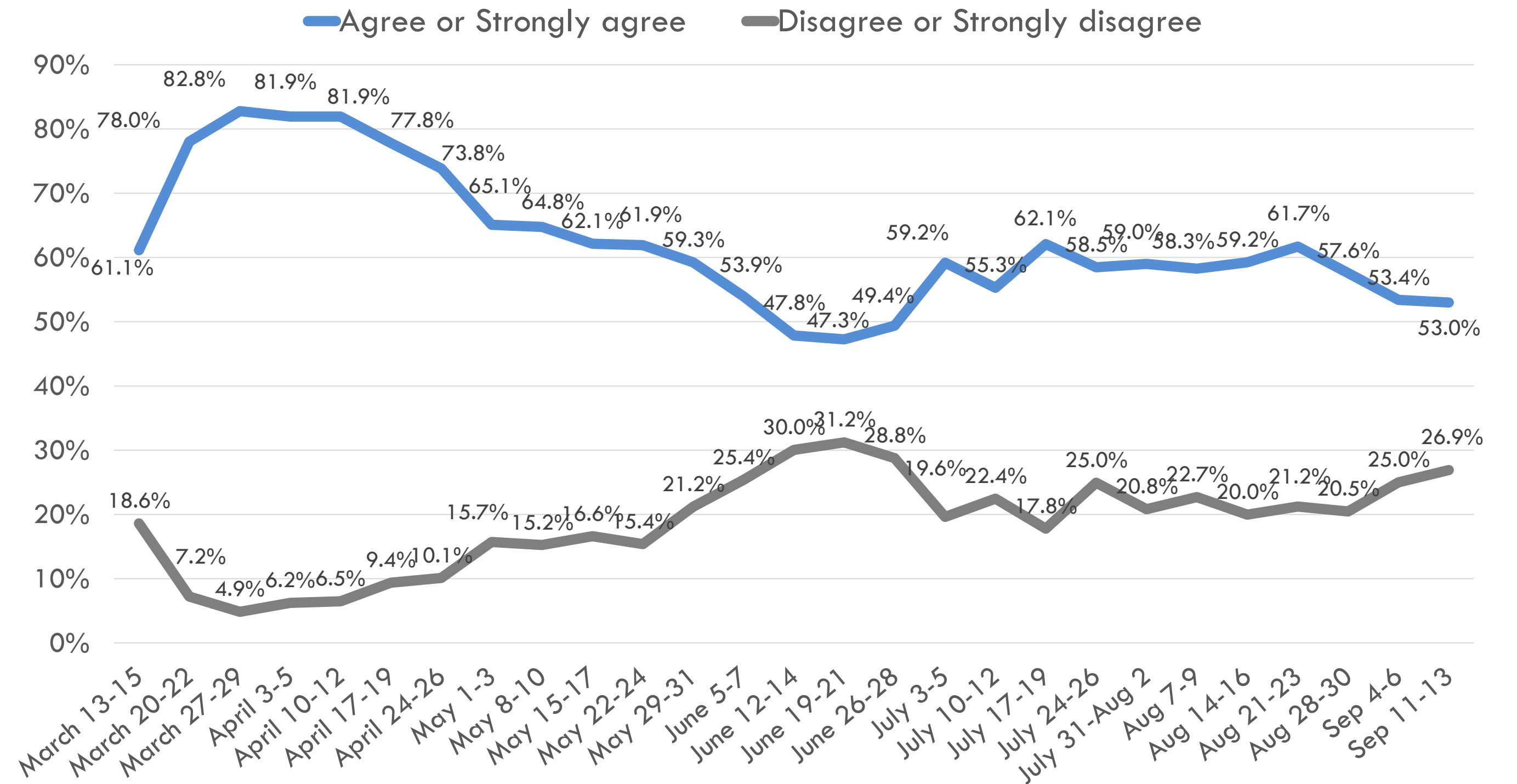
How much do you agree with the following statement?

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



(Base: Waves 1-27. 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, 1,225 and 1,205 completed surveys.)

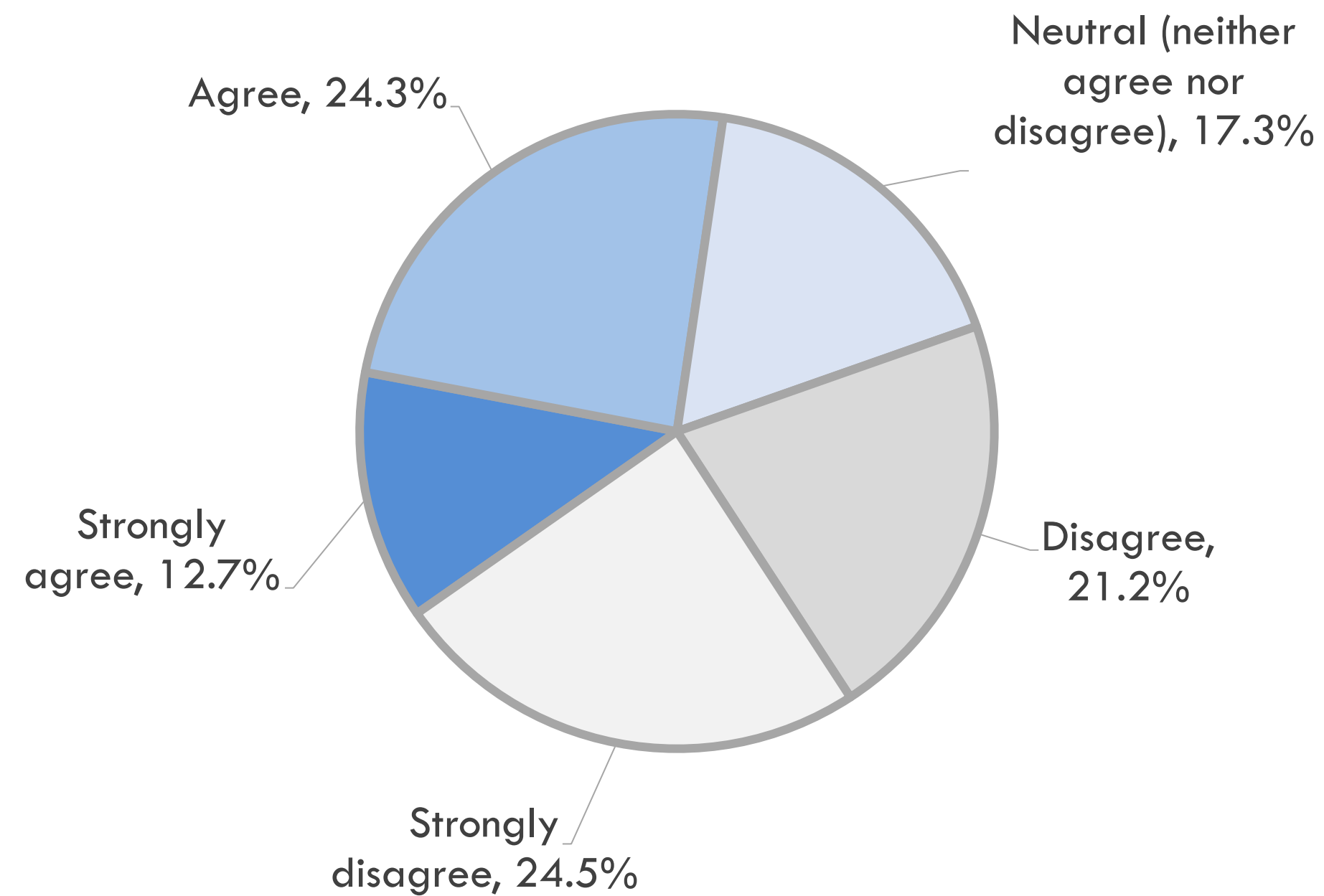
Historical data



EXPECTATIONS FOR TRAVELING IN THE FALL

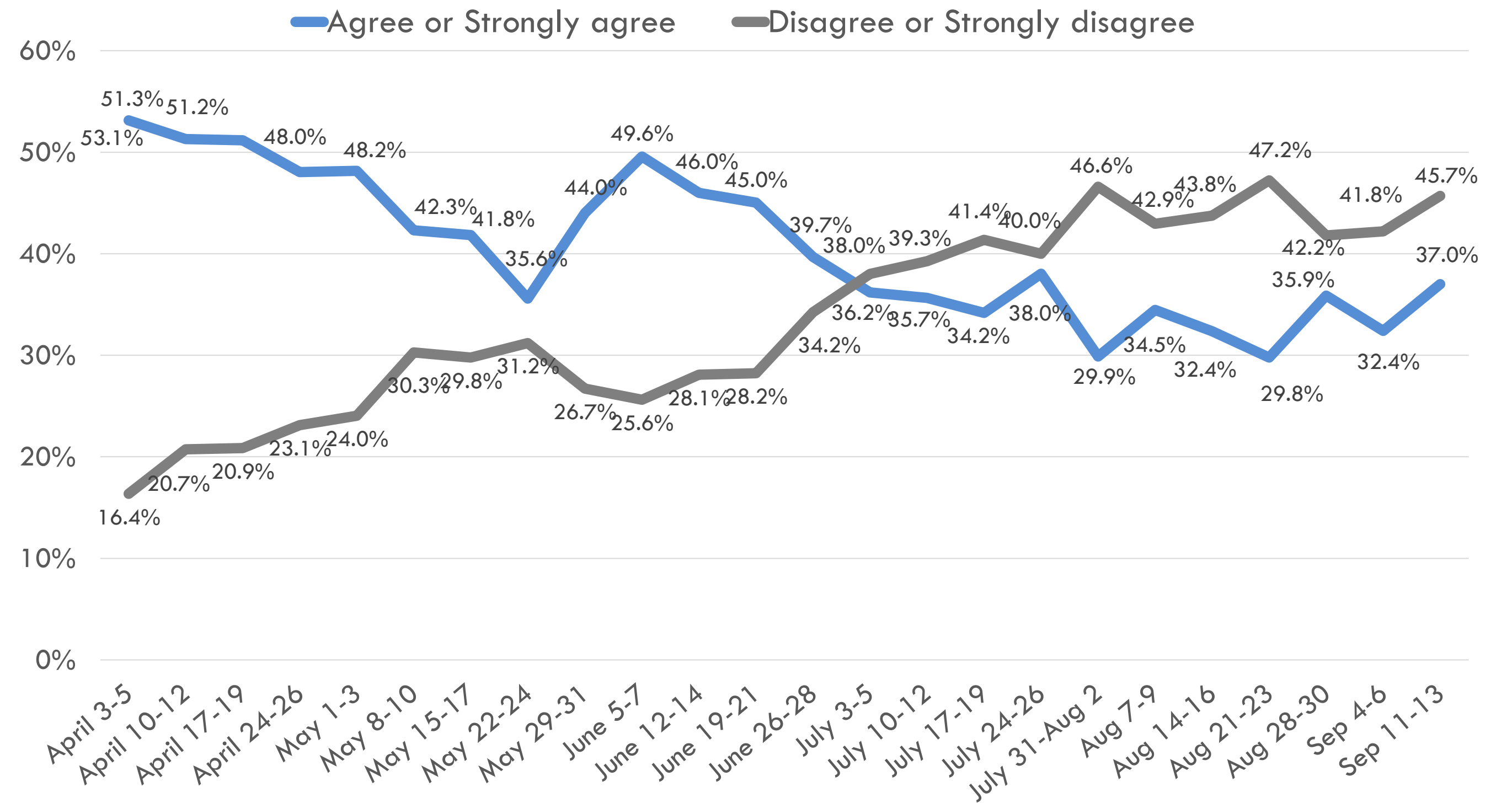
How much do you agree with the following statement?

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



(Base: Waves 4-27. 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, 1,225 and 1,205 completed surveys.)

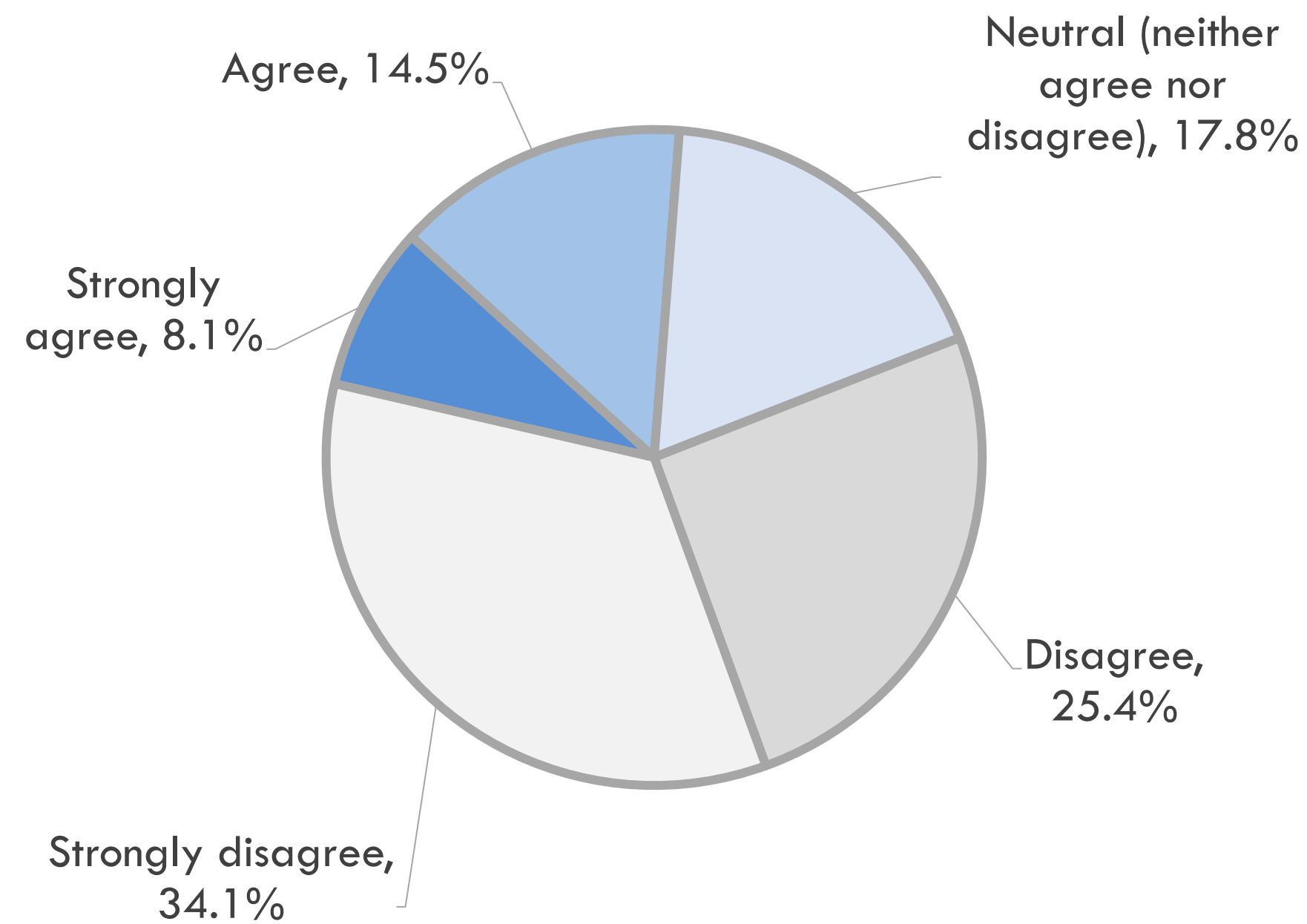
Historical data



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

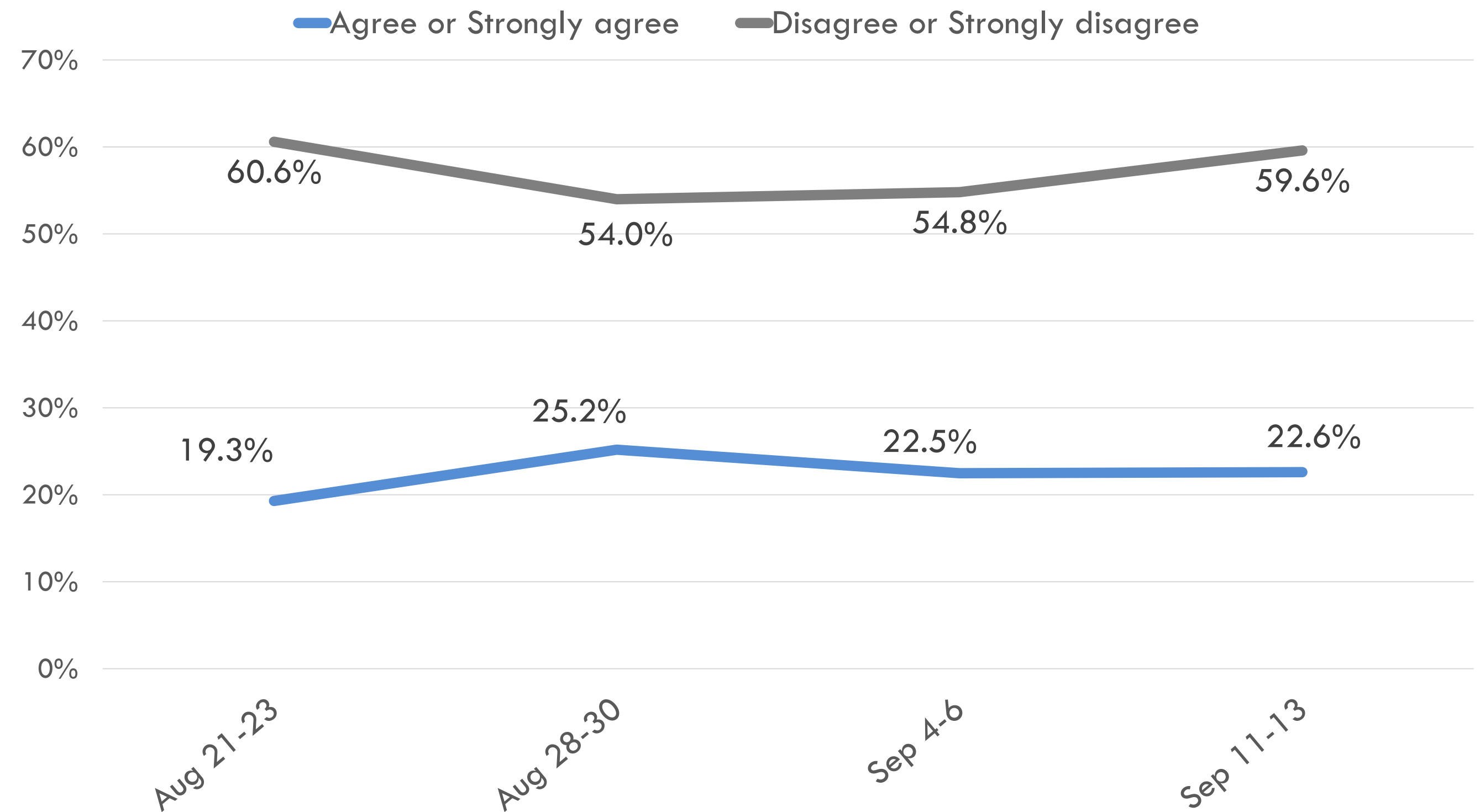
How much do you agree with the following statement?

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



(Base: Waves 24-27. All respondents, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

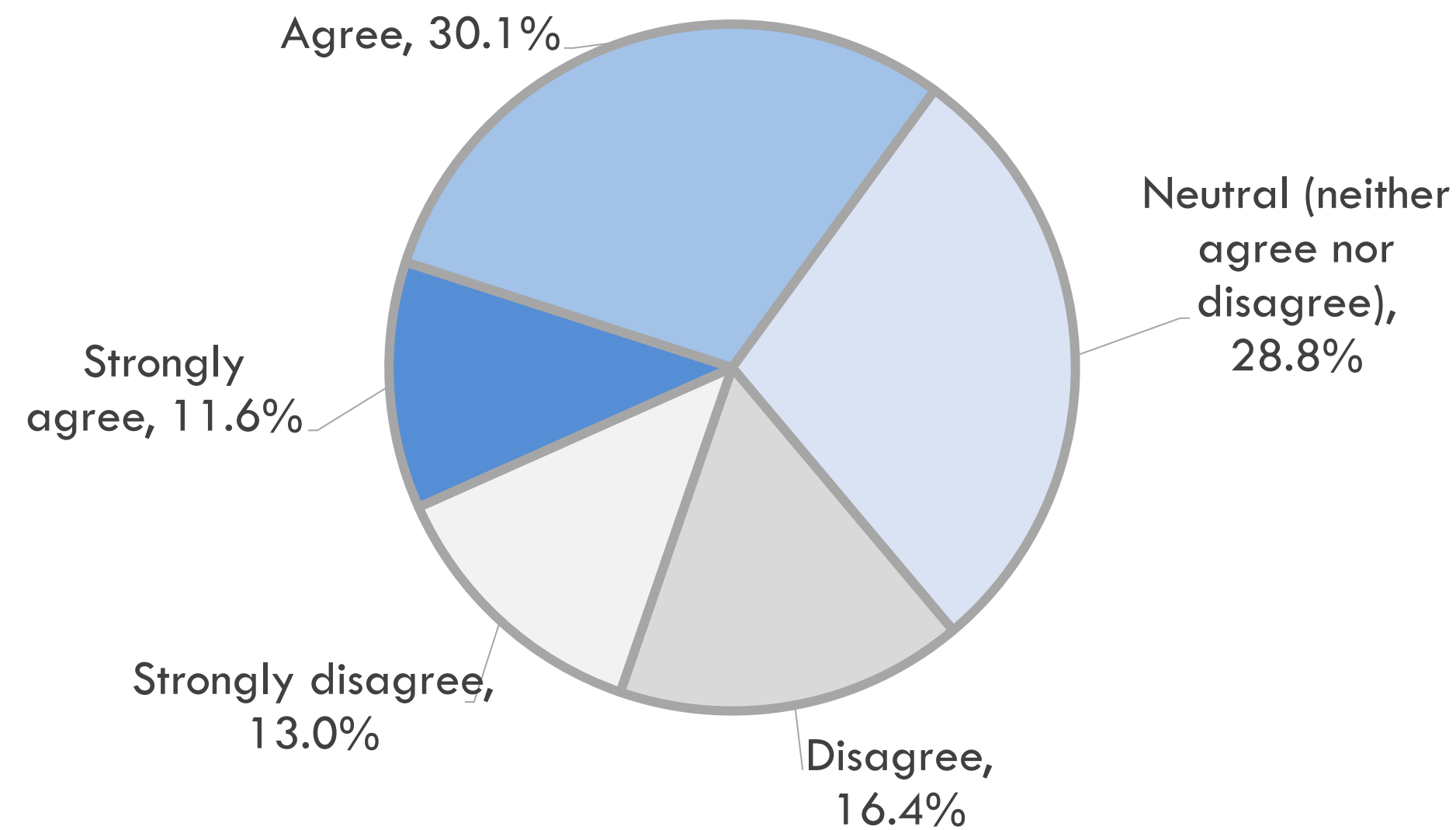
Historical data



DISCOUNTS AND PRICE CUTS

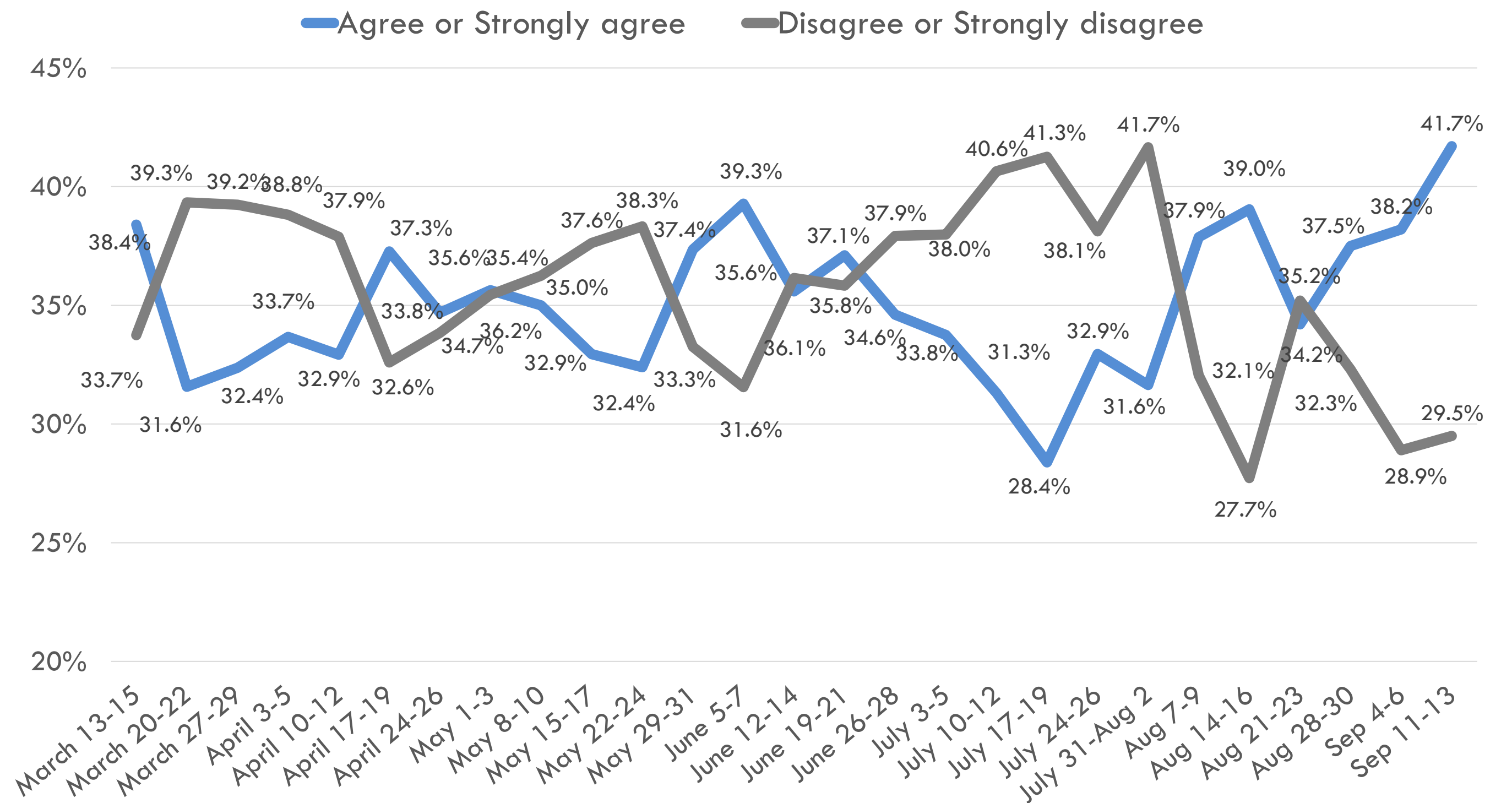
How much do you agree with the following statement?

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 1-27. 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, 1,225 and 1,205 completed surveys.)

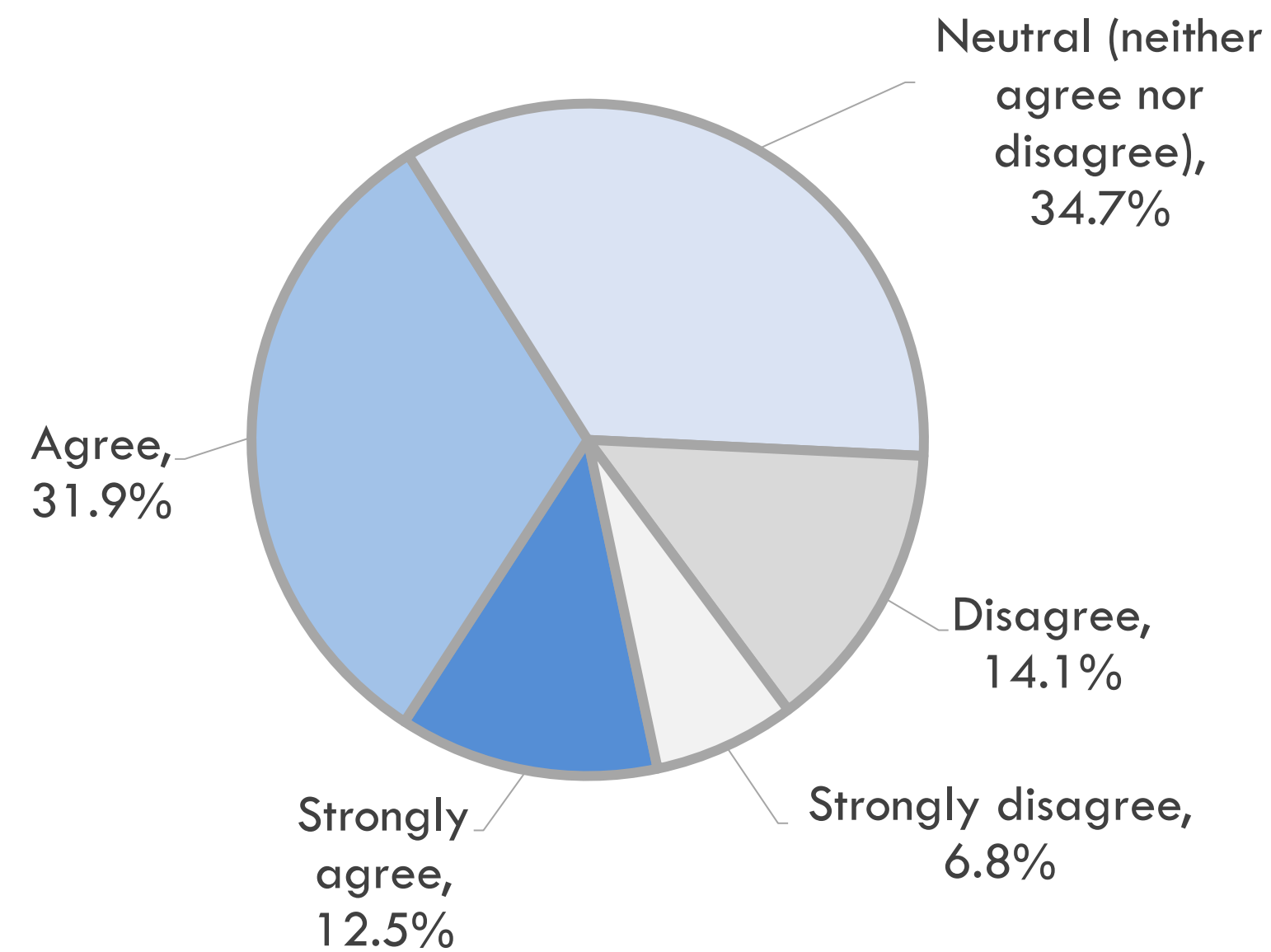
Historical data



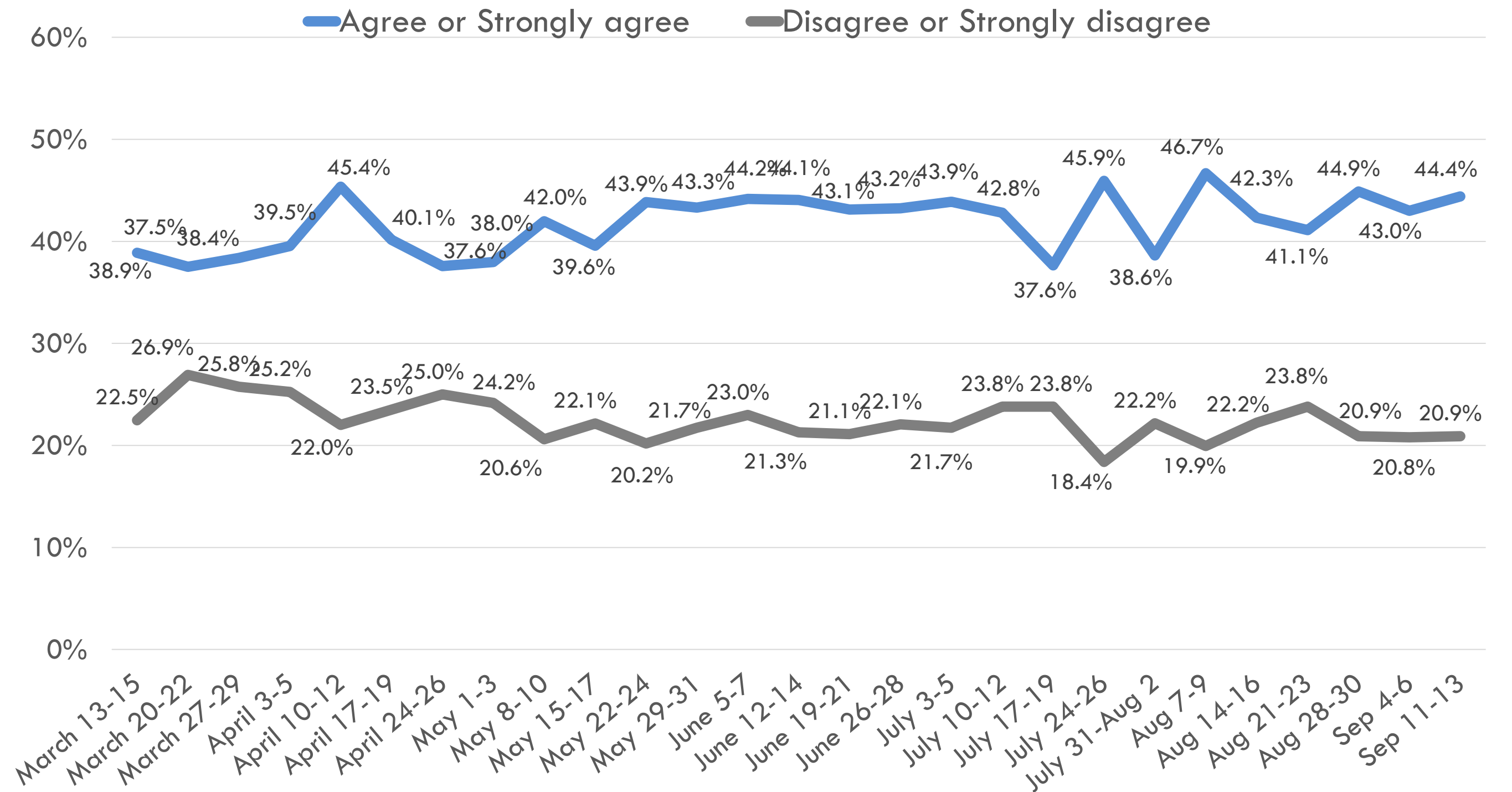
ROAD TRIPS AS A REPLACEMENT FOR AIRLINE TRAVEL

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.



Historical data

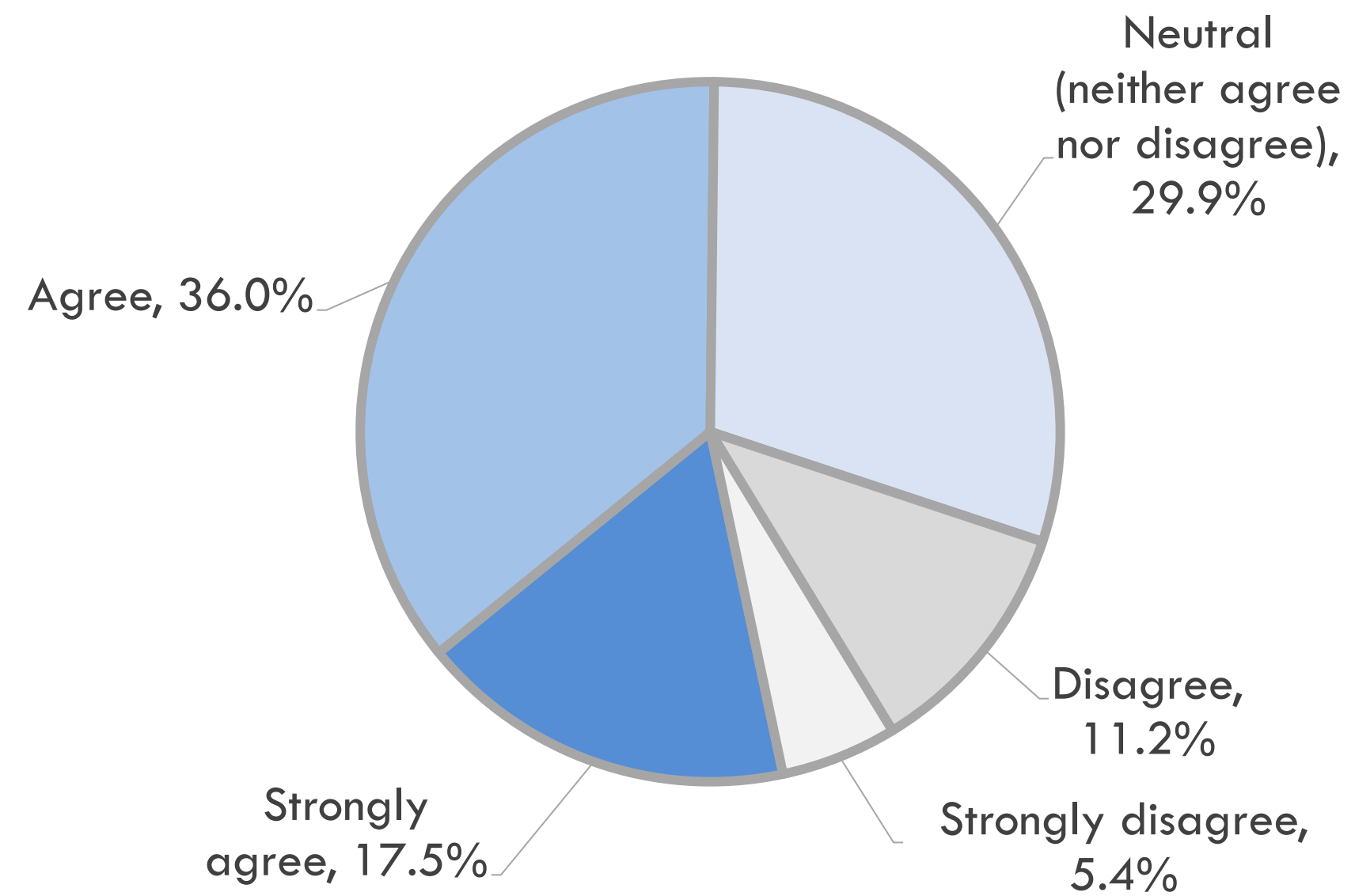


(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

REGIONAL TRIPS AS A REPLACEMENT FOR LONG-HAUL TRAVEL

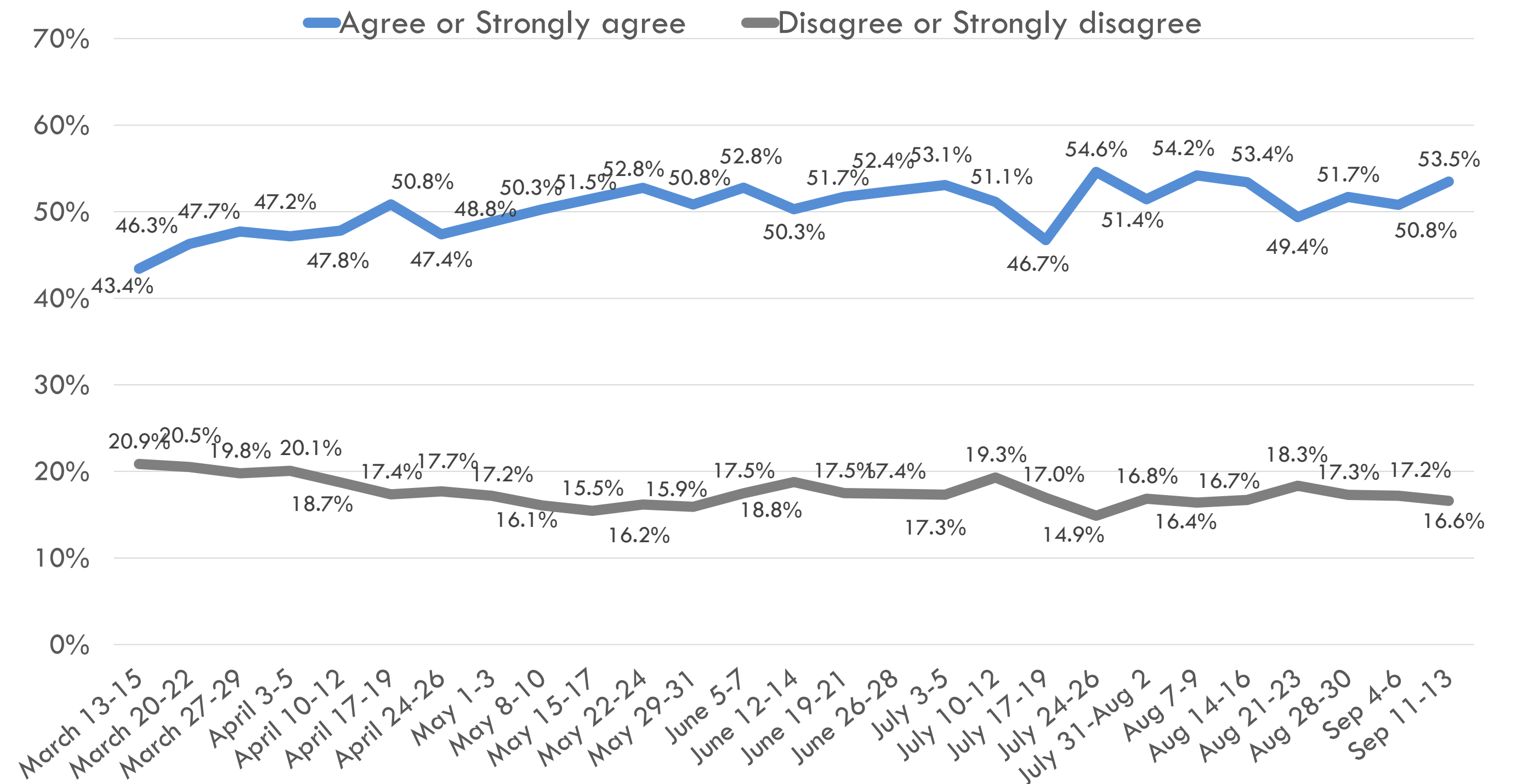
How much do you agree with the following statement?

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



(Base: Waves 1-27. 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, 1,225 and 1,205 completed surveys.)

Historical data

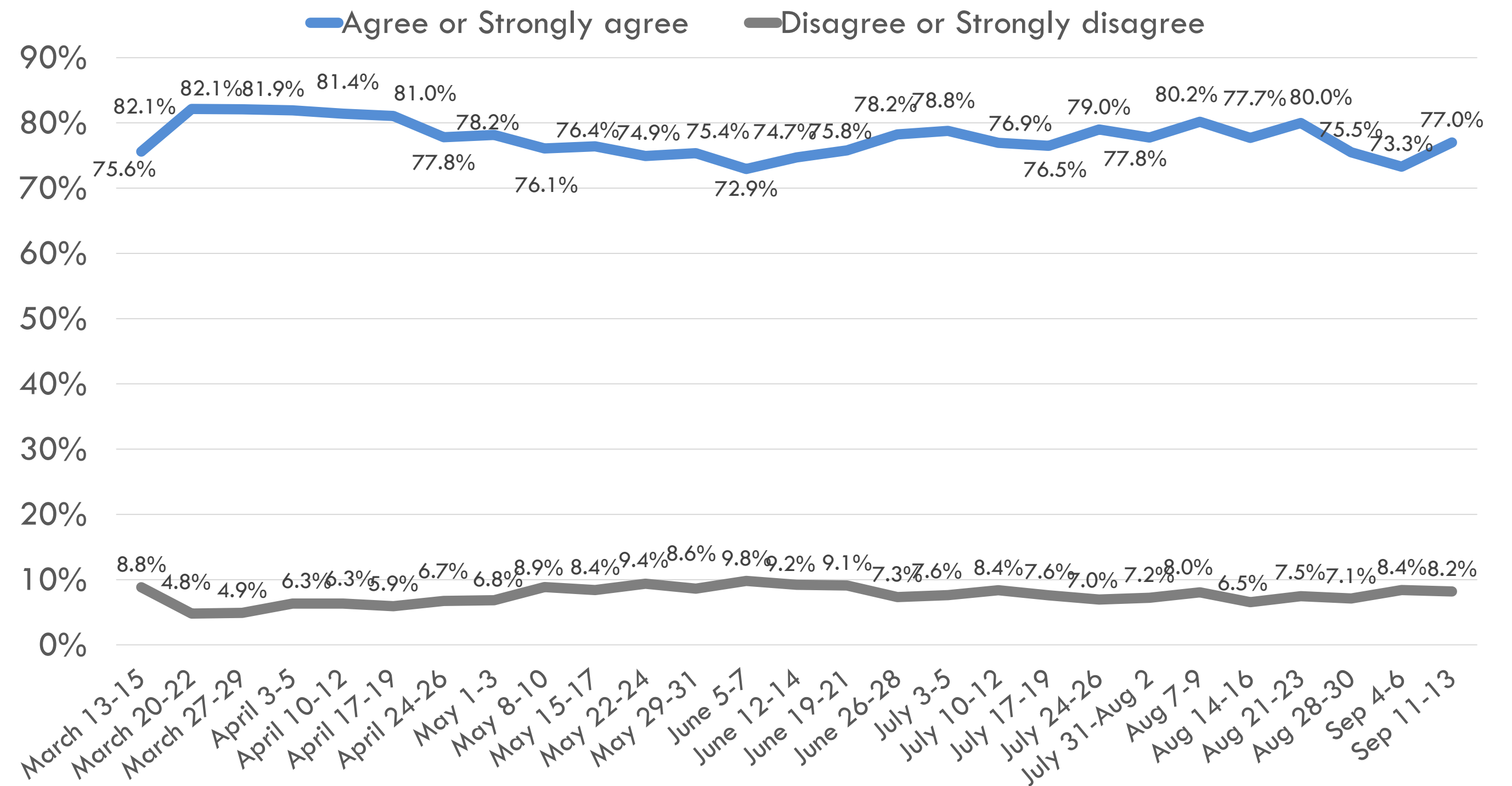
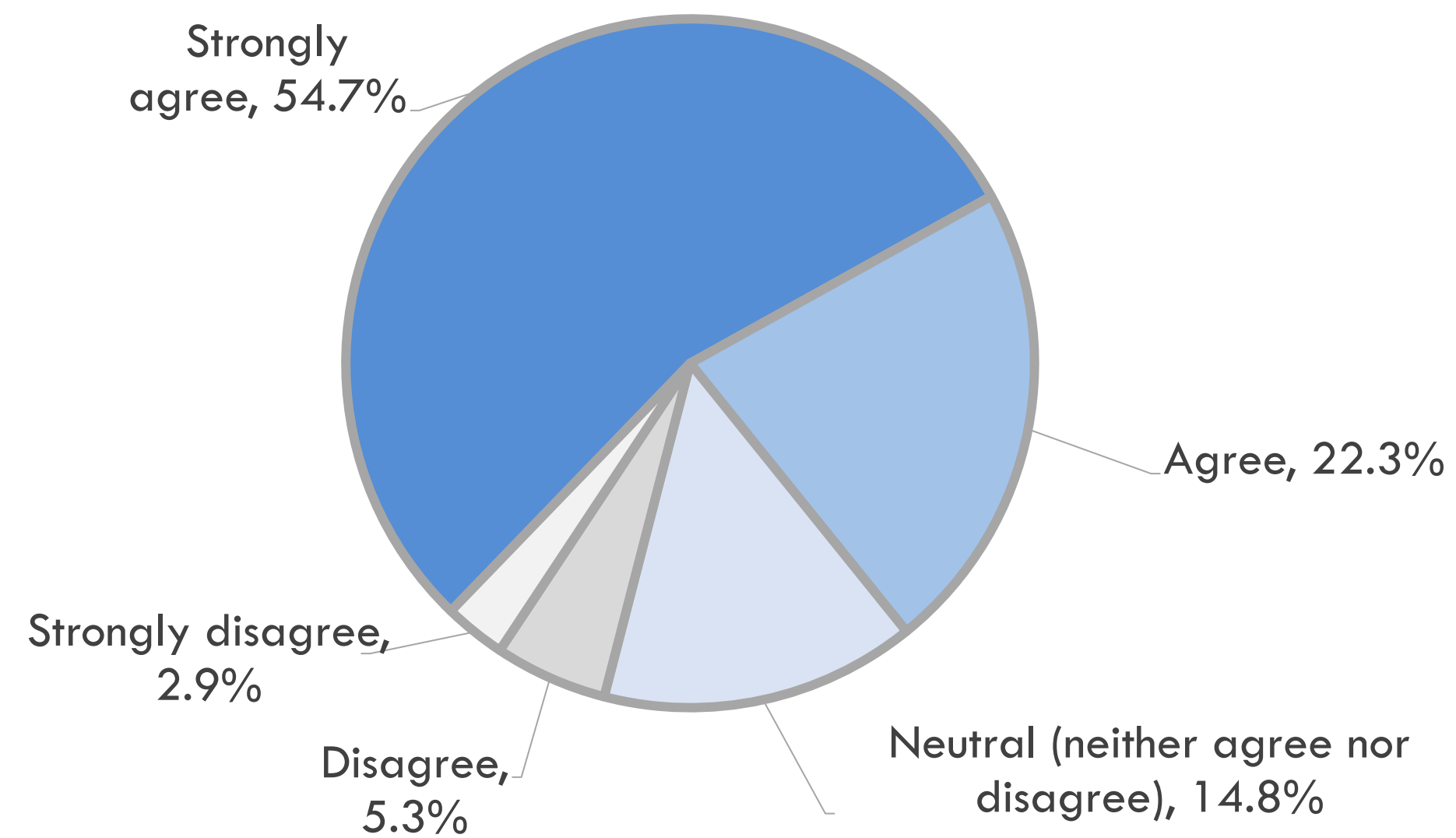


AVOIDING INTERNATIONAL TRAVEL

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.

Historical data



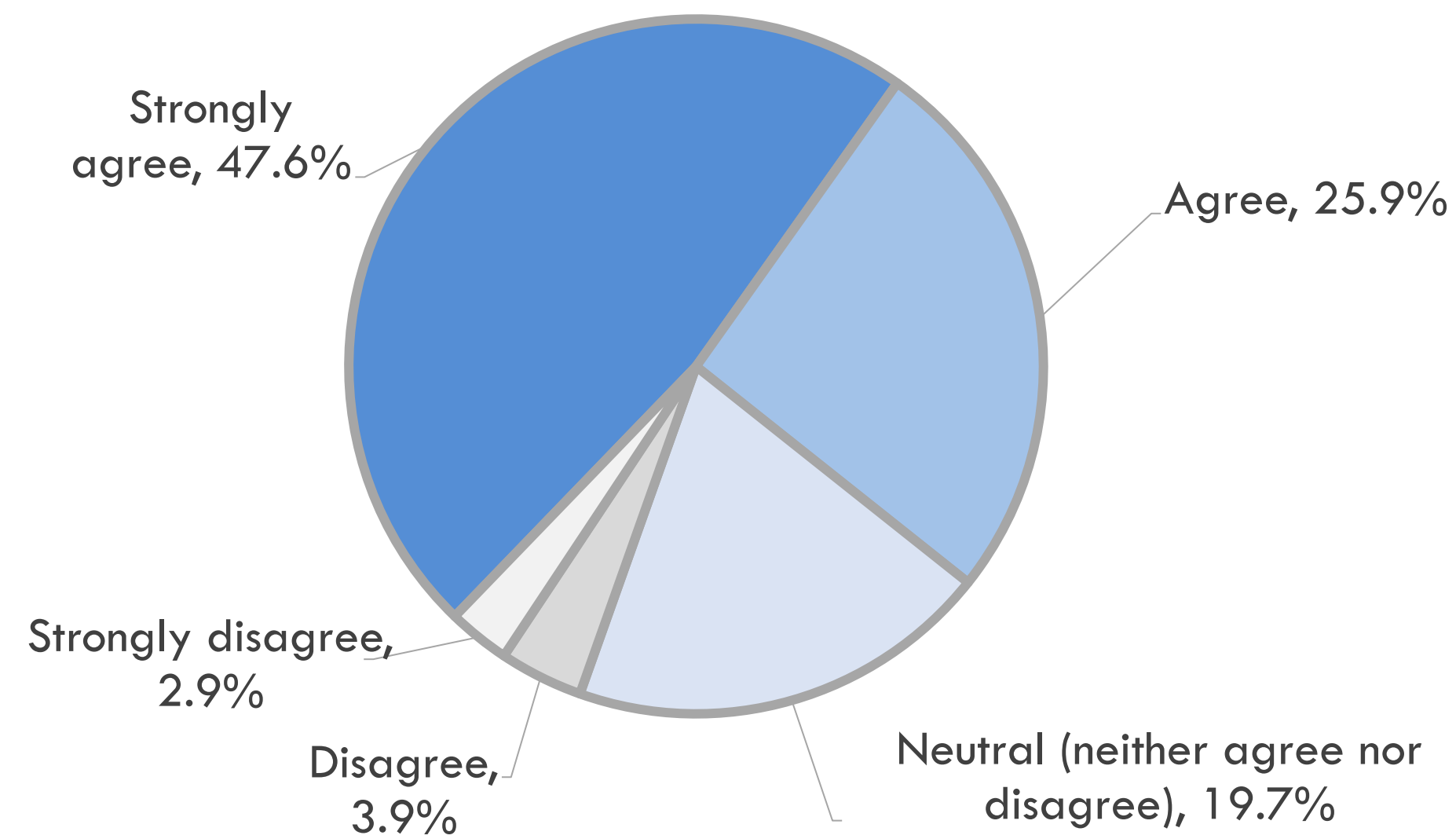
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

AVOIDING CONVENTIONS & CONFERENCES

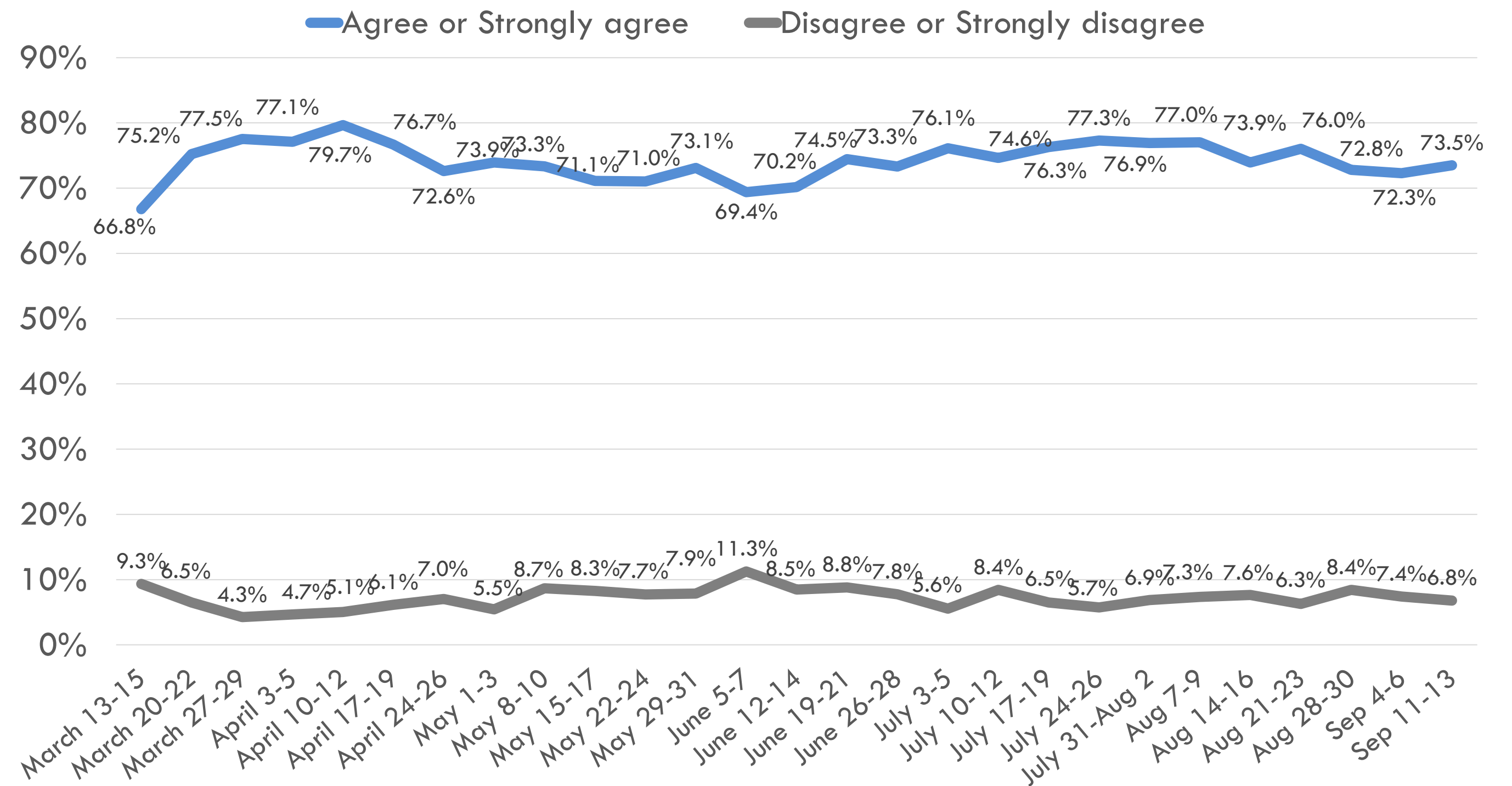
How much do you agree with the following statement?

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

Historical data



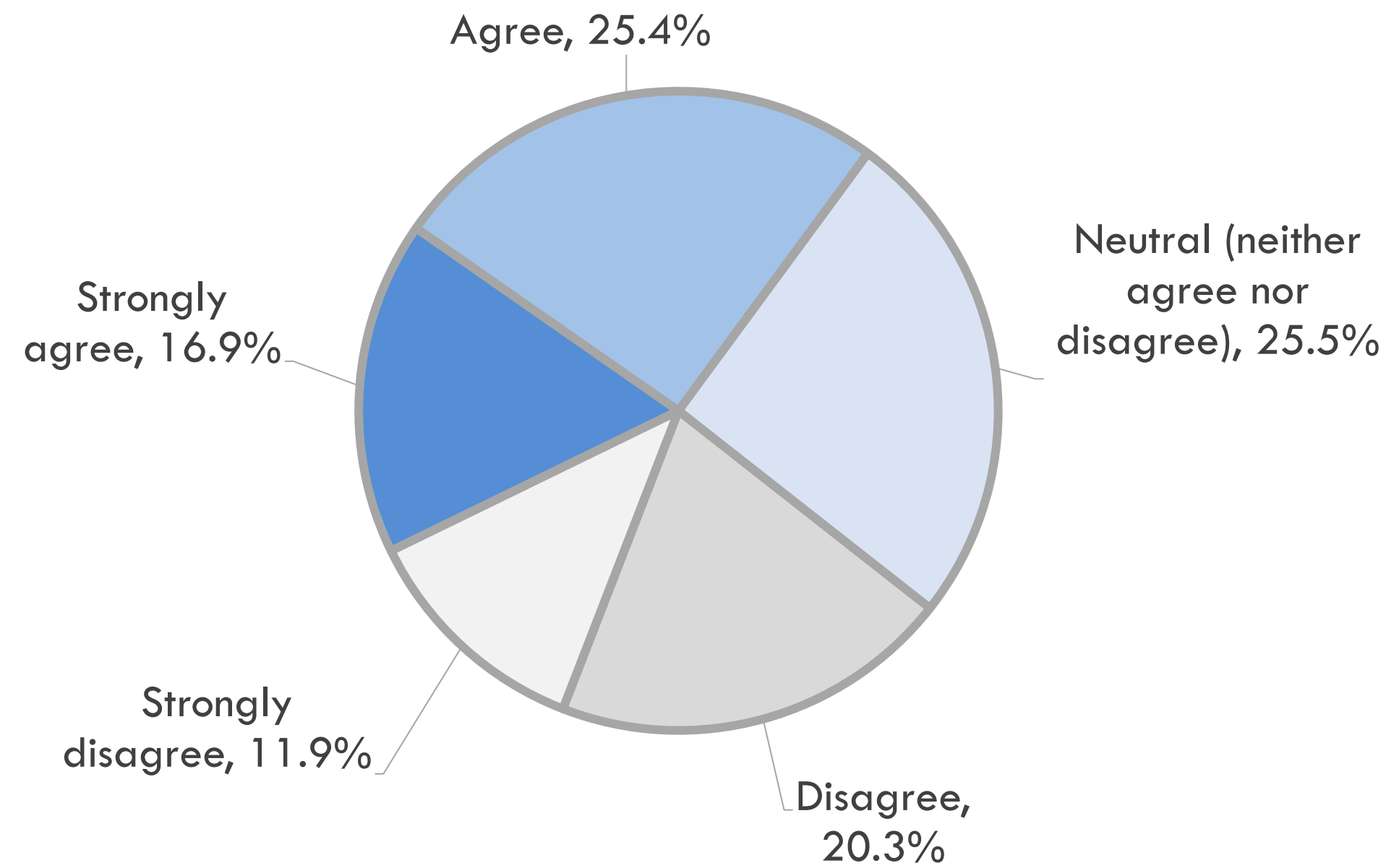
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)



COMFORT ENJOYING HOME COMMUNITY

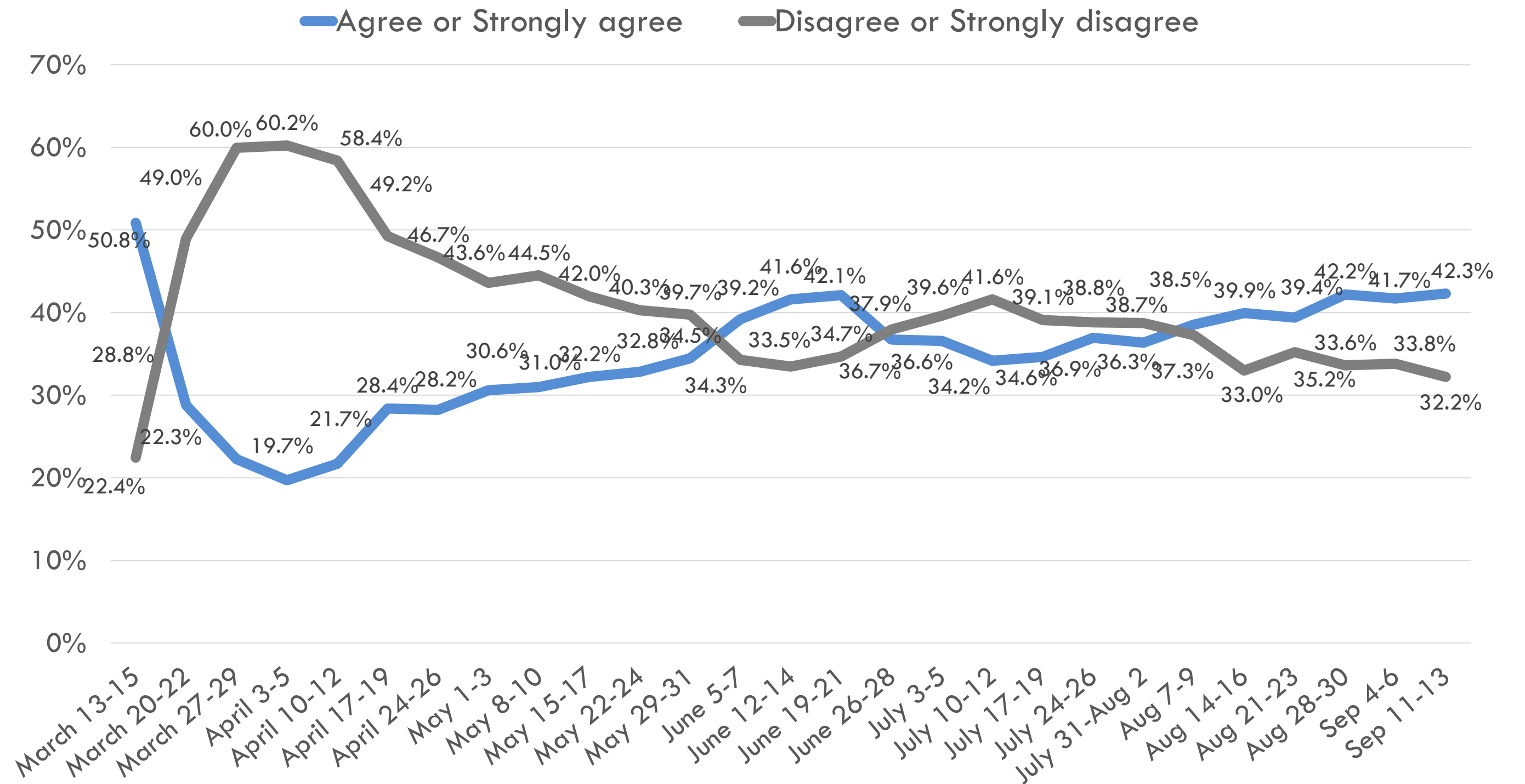
How much do you agree with the following statement?

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



(Base: Waves 1-27. 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, 1,225 and 1,205 completed surveys.)

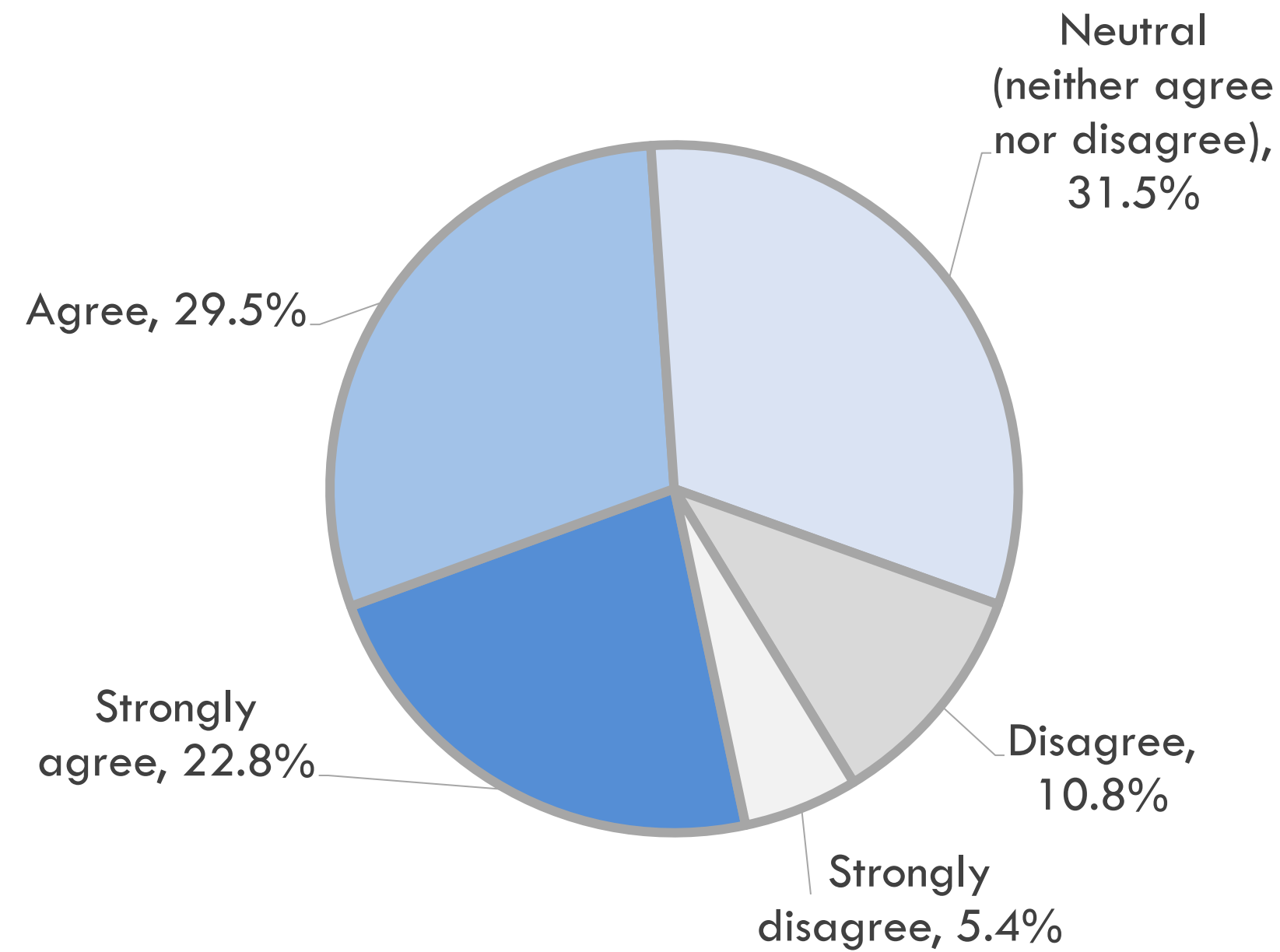
Historical data



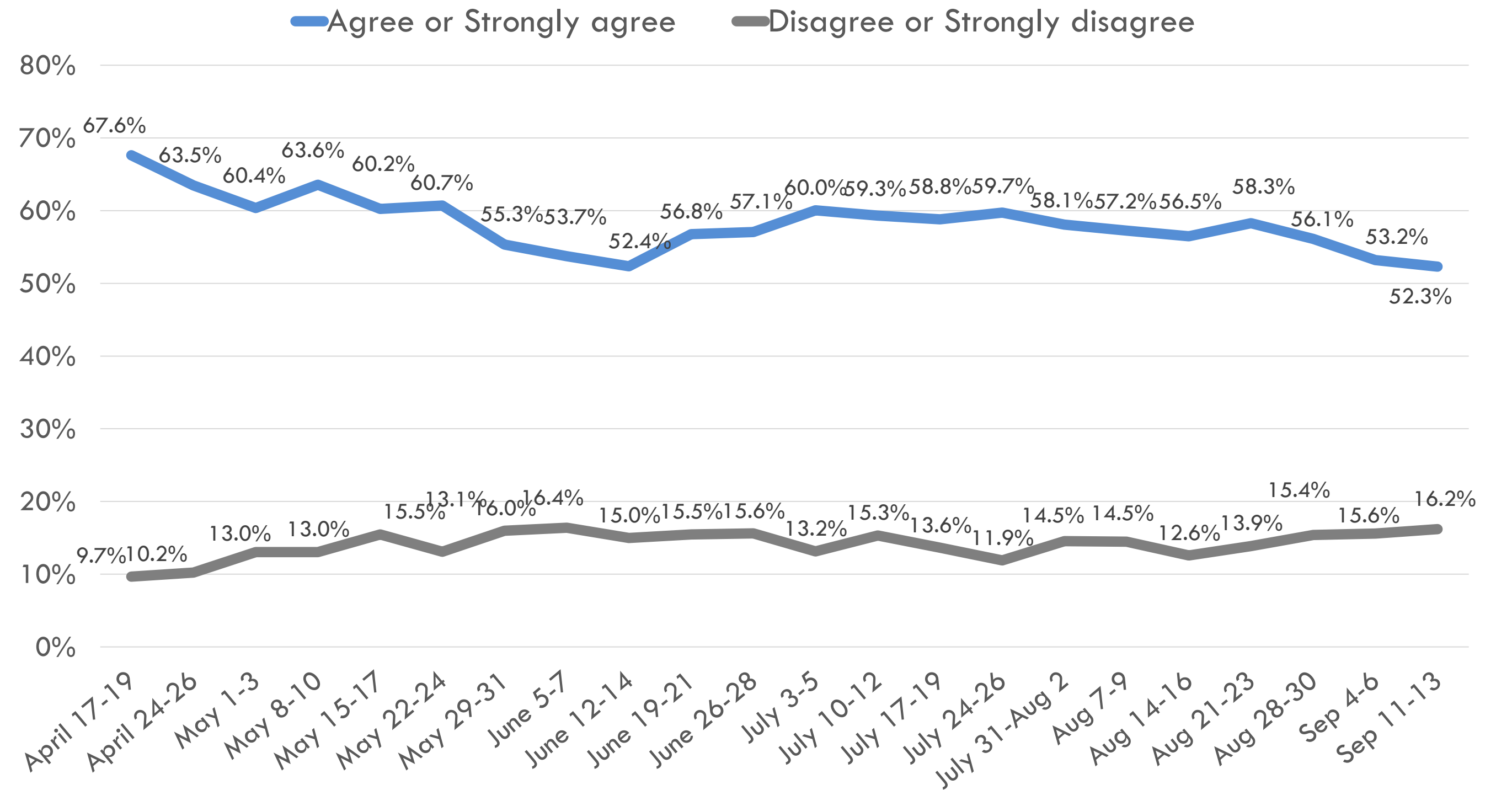
TRAVELERS IN COMMUNITY ARE UNWANTED

How much do you agree with the following statement?

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



Historical data

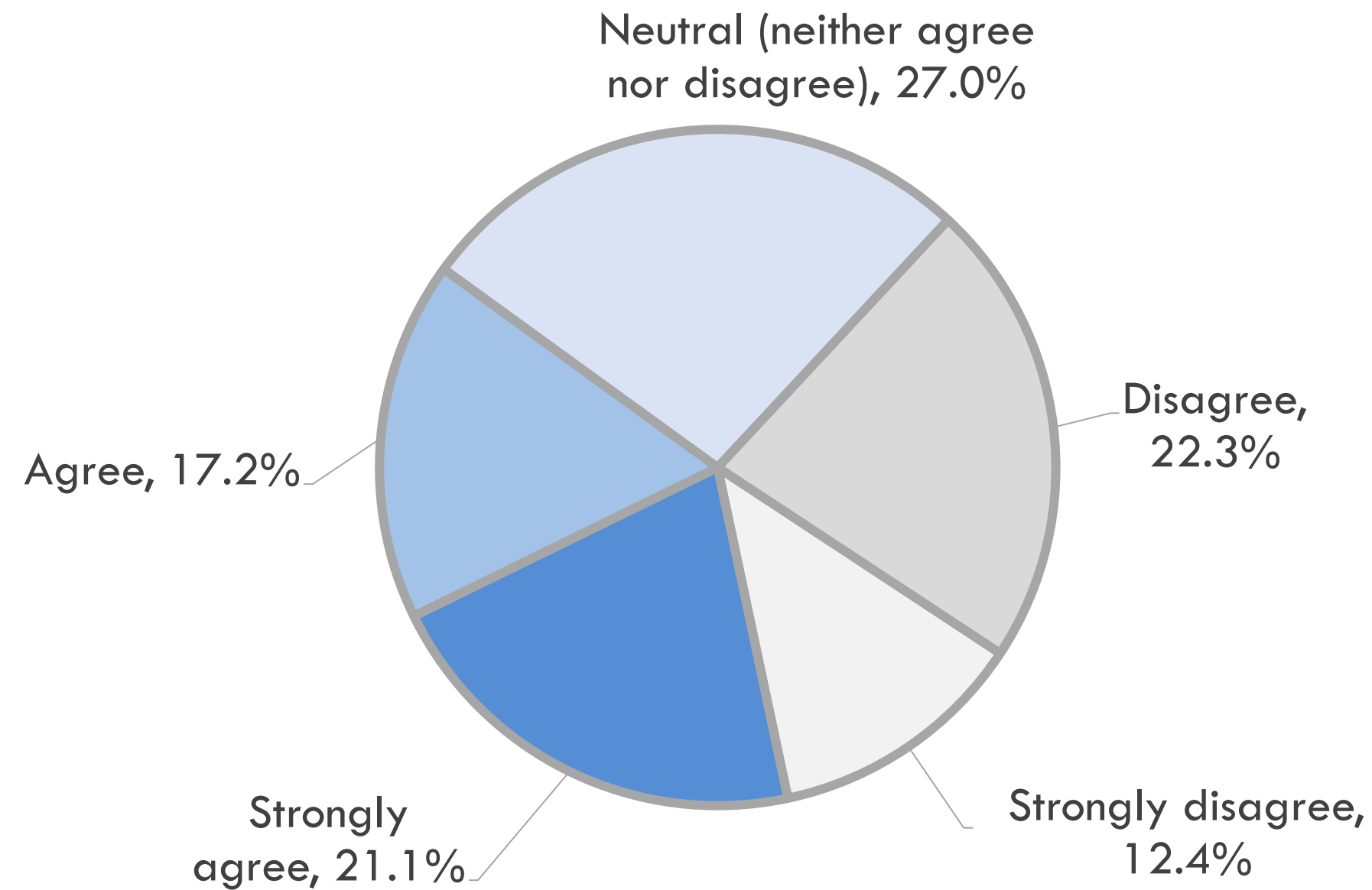


(Base: Waves 6-27. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed survey.)

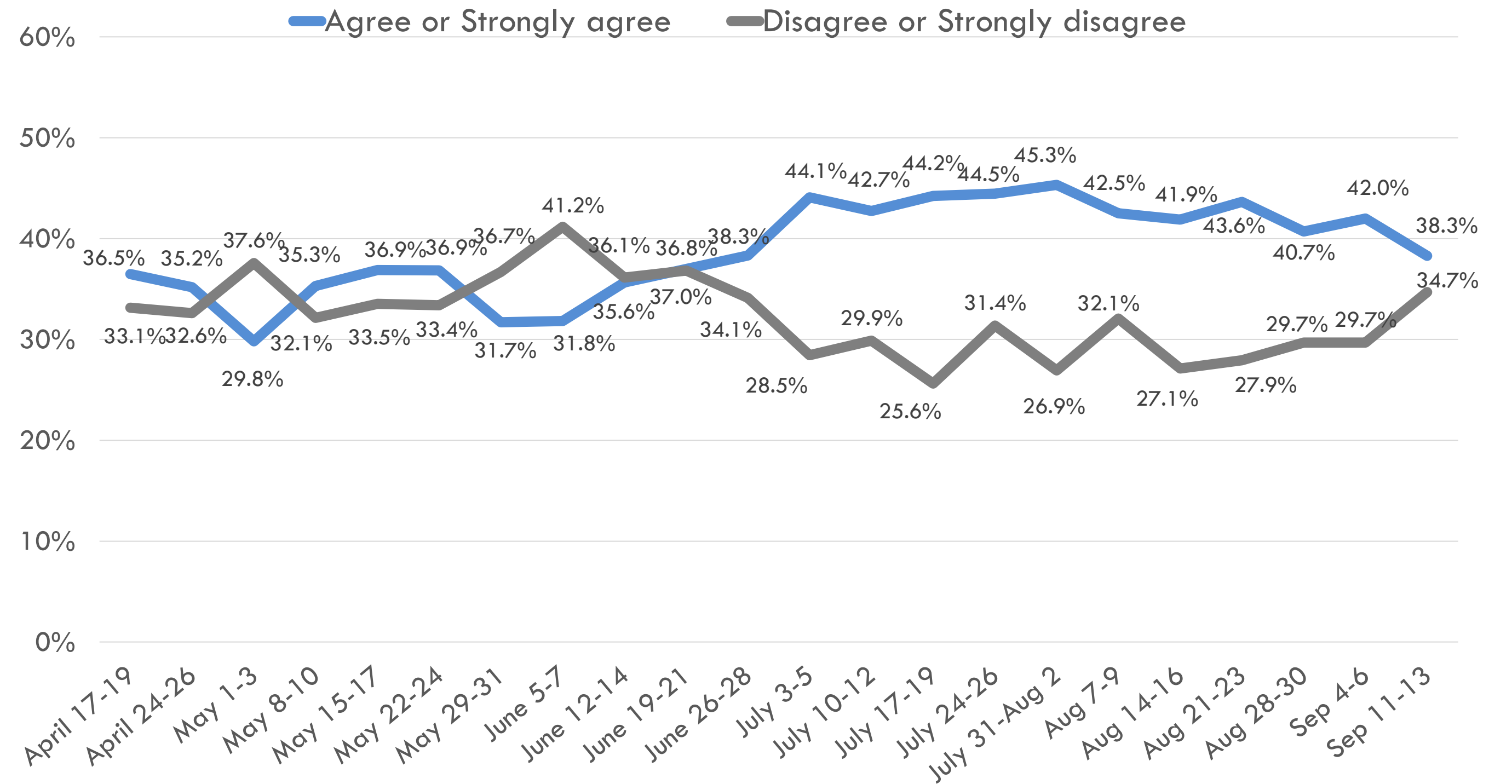
WON'T TRAVEL WITHOUT VACCINE

How much do you agree with the following statement?

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



Historical data



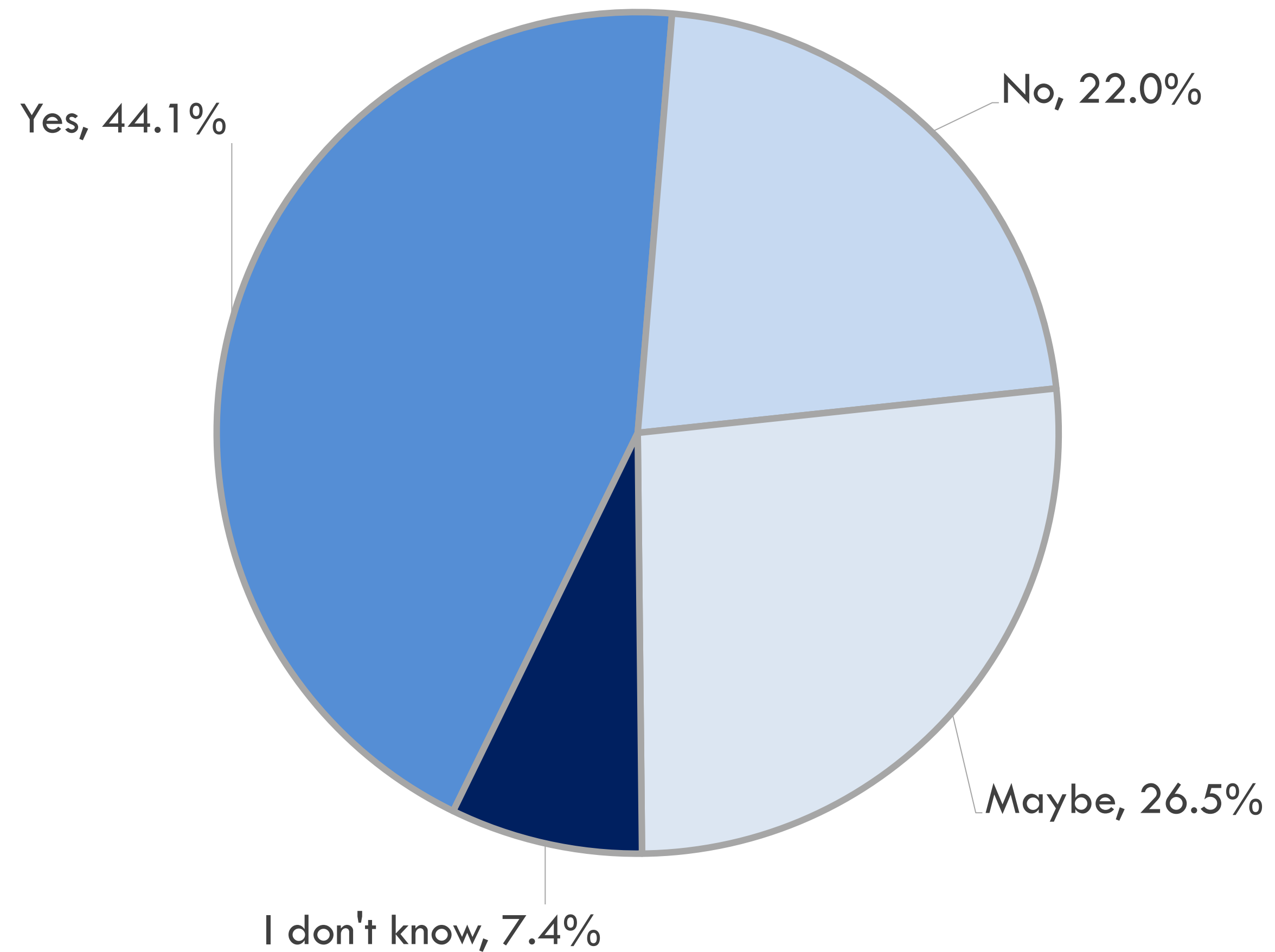
(Base: Waves 6-27. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

WILL THEY TAKE A VACCINE?

Question: If a COVID-19 vaccine is developed later this year (or early next year) and approved for use, would you take it?

(Assume the vaccine is 75% effective and has mild to moderate side effects)

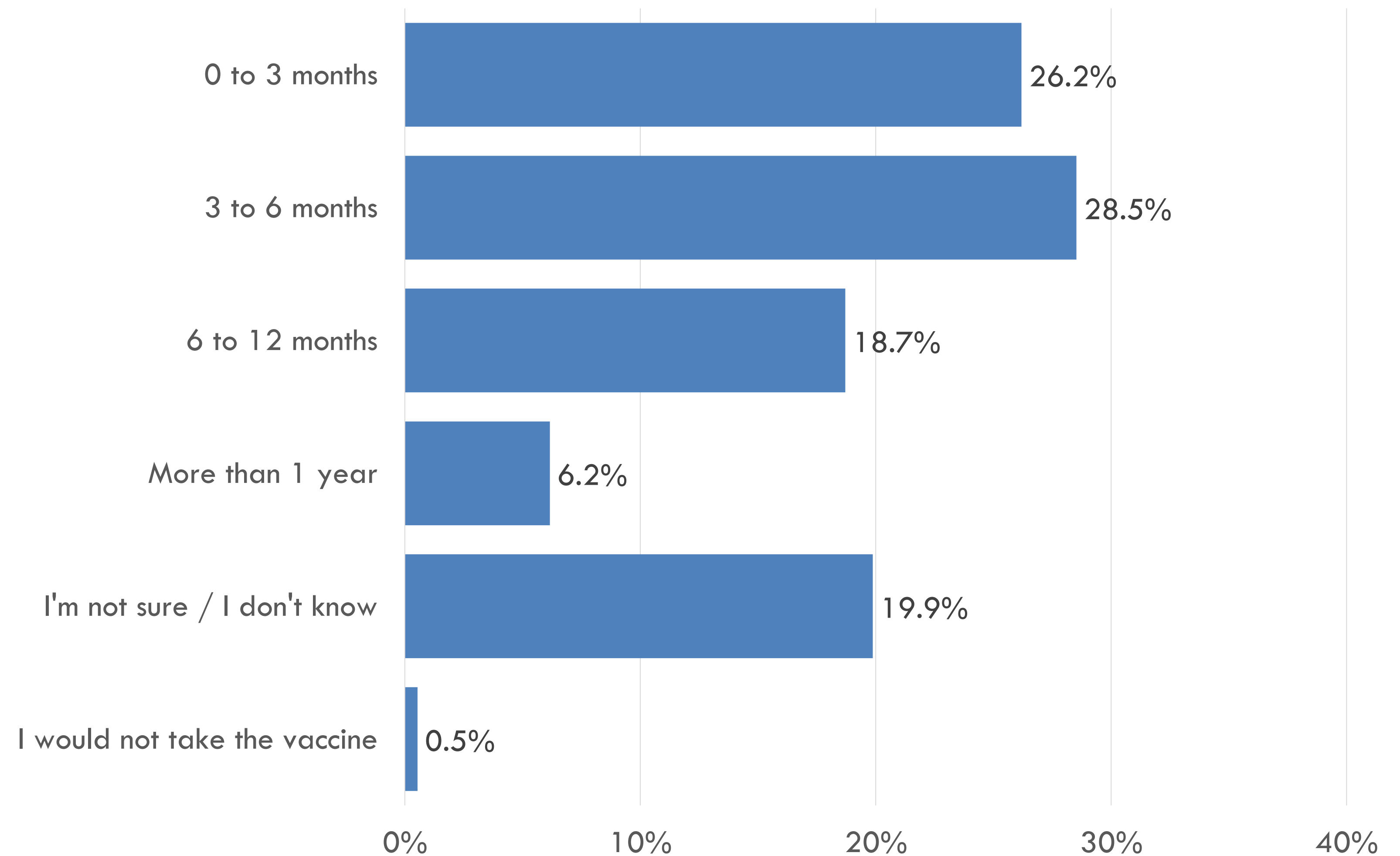
(Base: Wave 27 data. All respondents, 1,205 completed surveys. Data collected September 11-13, 2020)



LENGTH OF TIME BEFORE WILLINGNESS TO TAKE A VACCINE?

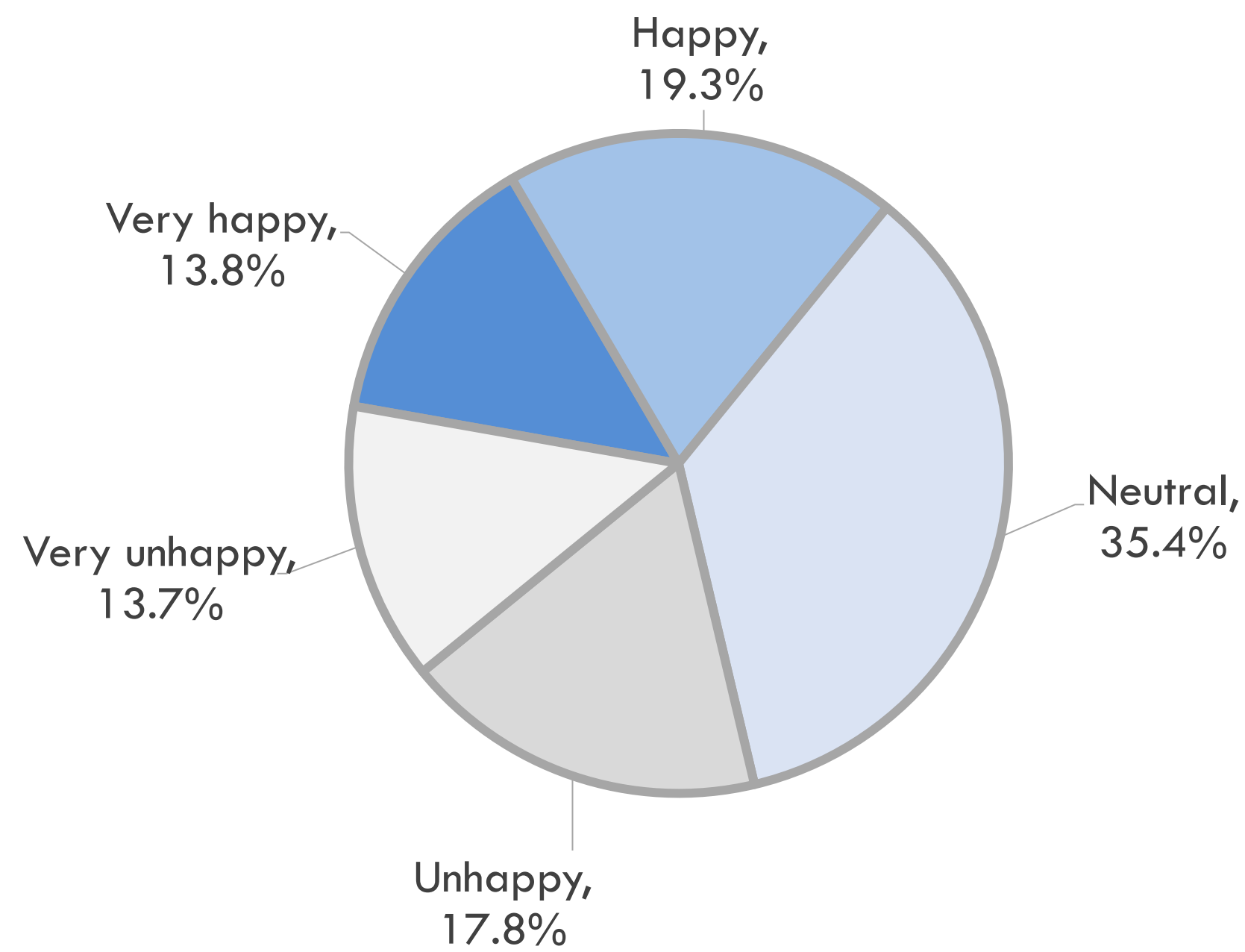
Question: How long would you prefer to wait before taking the vaccine? (Select one)

(Base: Wave 27 data. Respondents who said they would or maybe or are unsure of whether they would take a vaccine, 946 completed surveys. Data collected September 11-13, 2020)



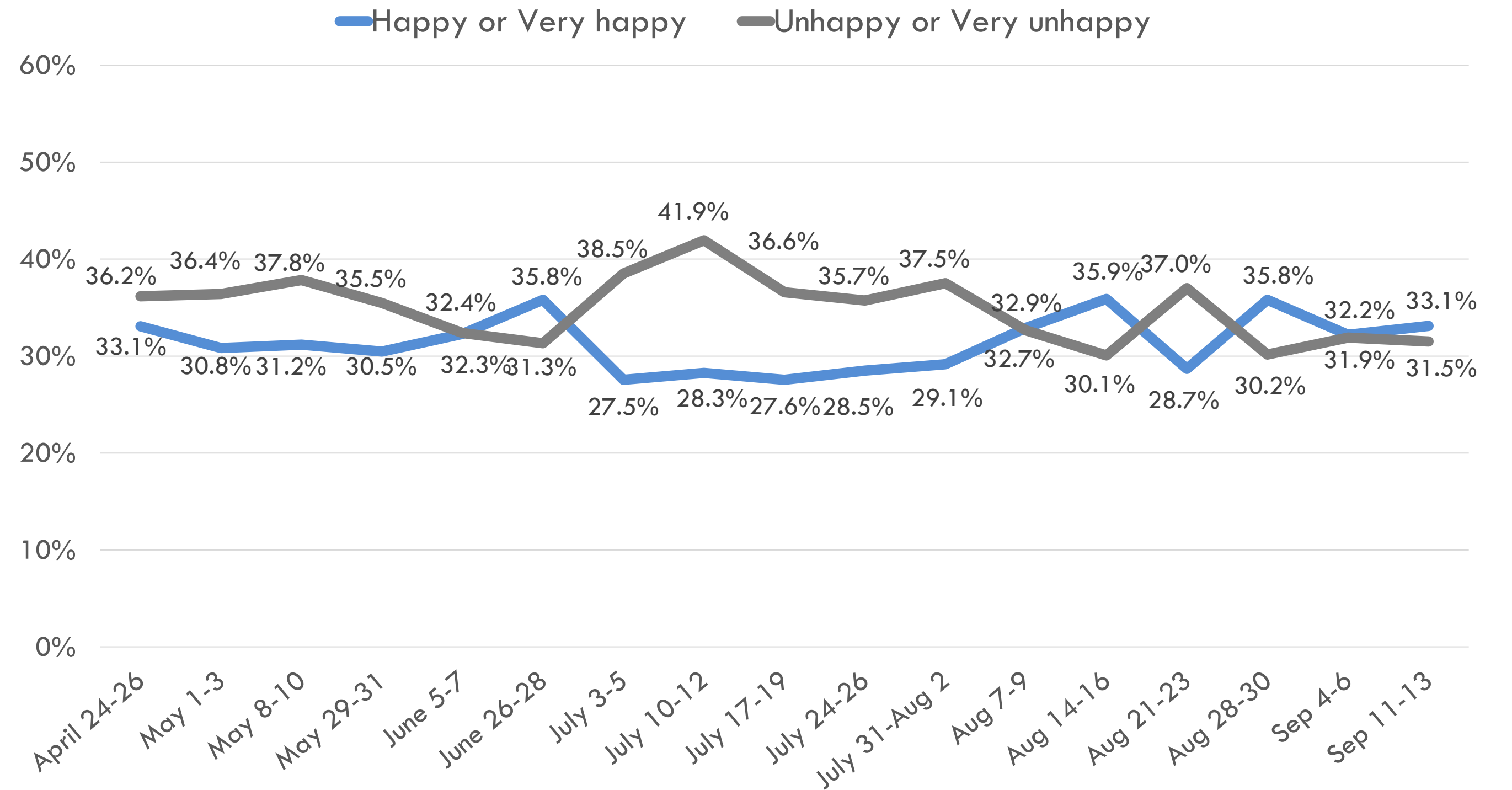
FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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 16-27. 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, 1,225 and 1,205 completed surveys.)

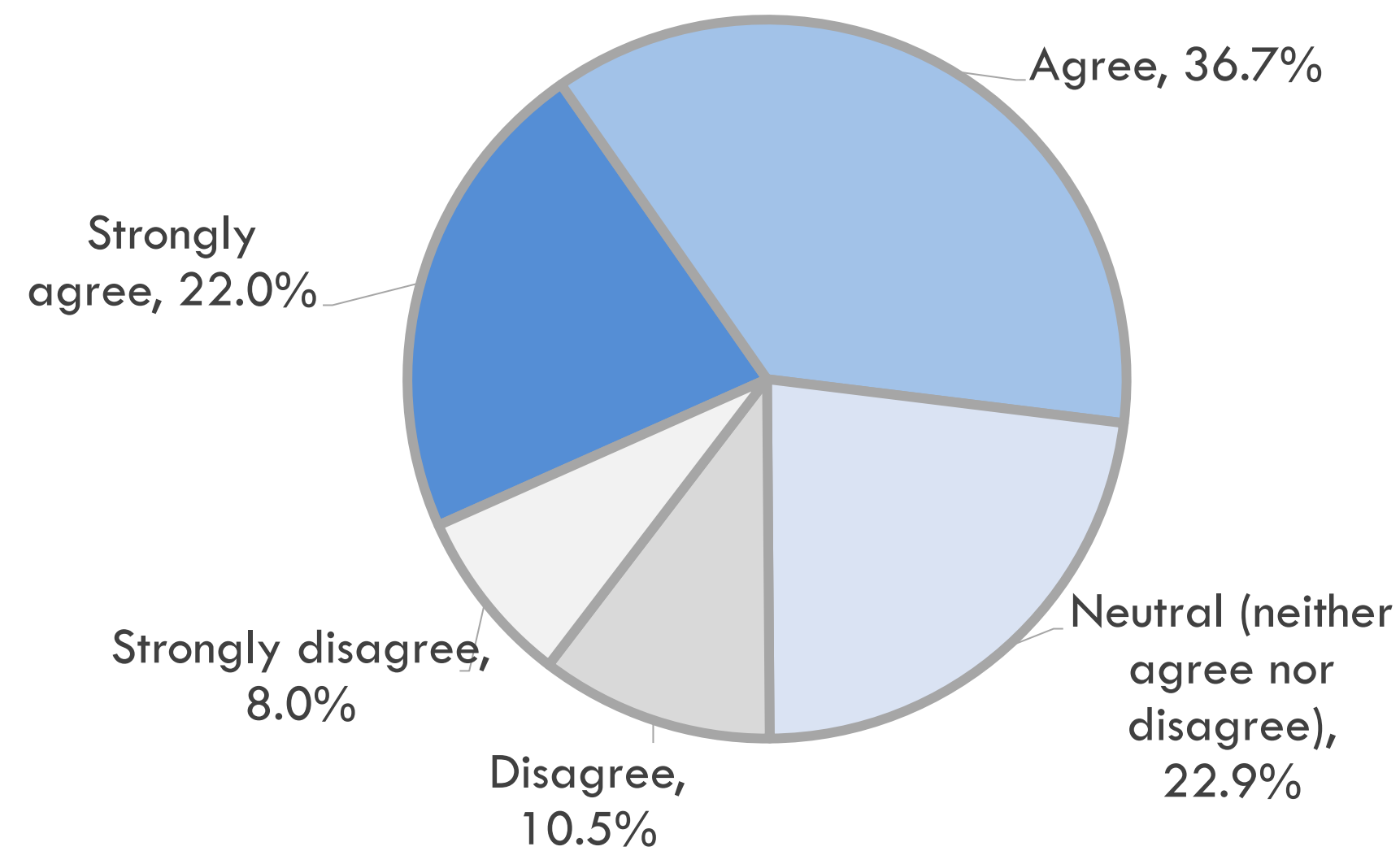
Historical data



HAPPINESS PLANNING A VACATION WITHIN NEXT 6 MONTHS

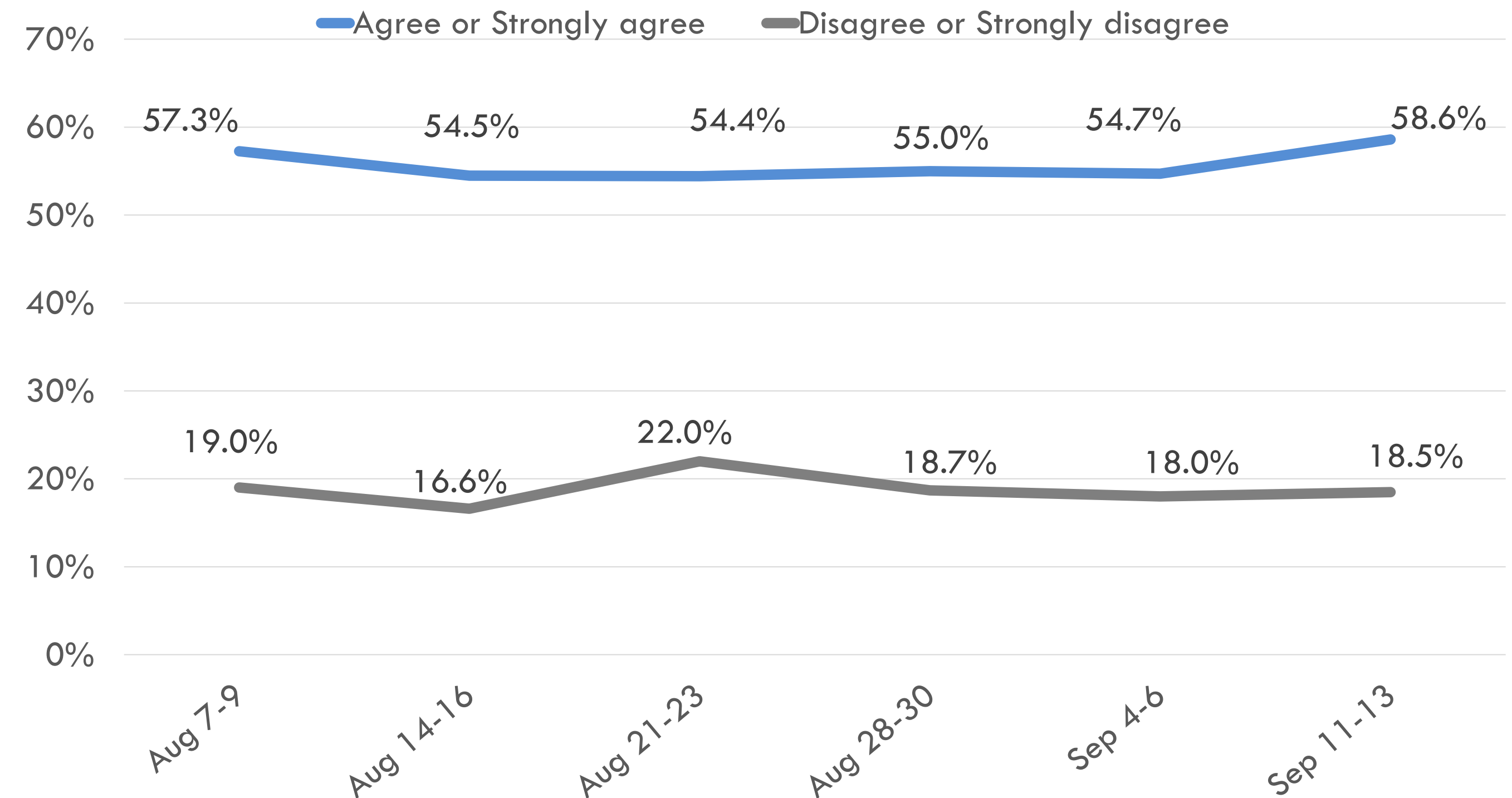
How much do you agree with the following statement?

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



(Base: Waves 22-27. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

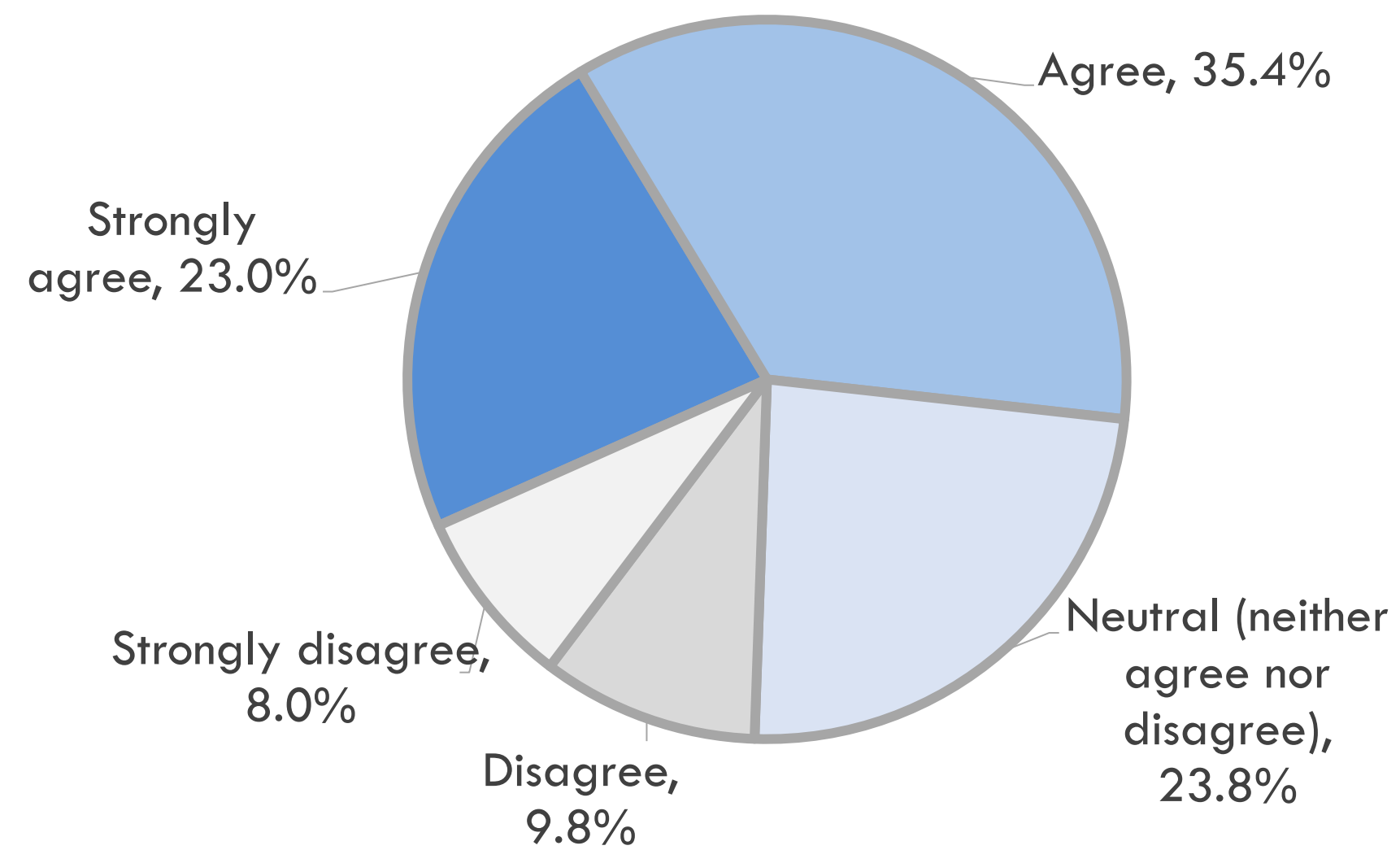
Historical data



HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS

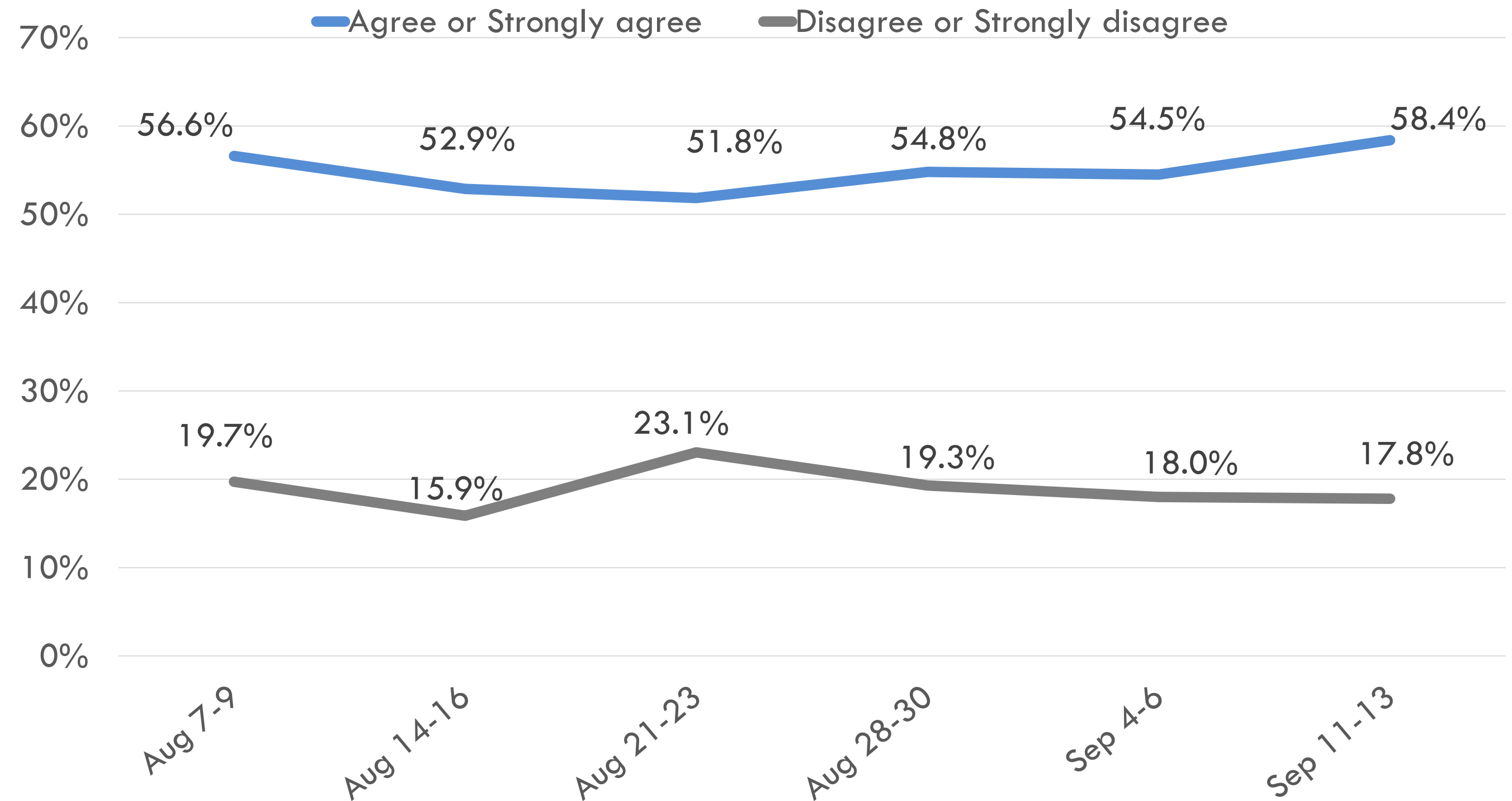
How much do you agree with the following statement?

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



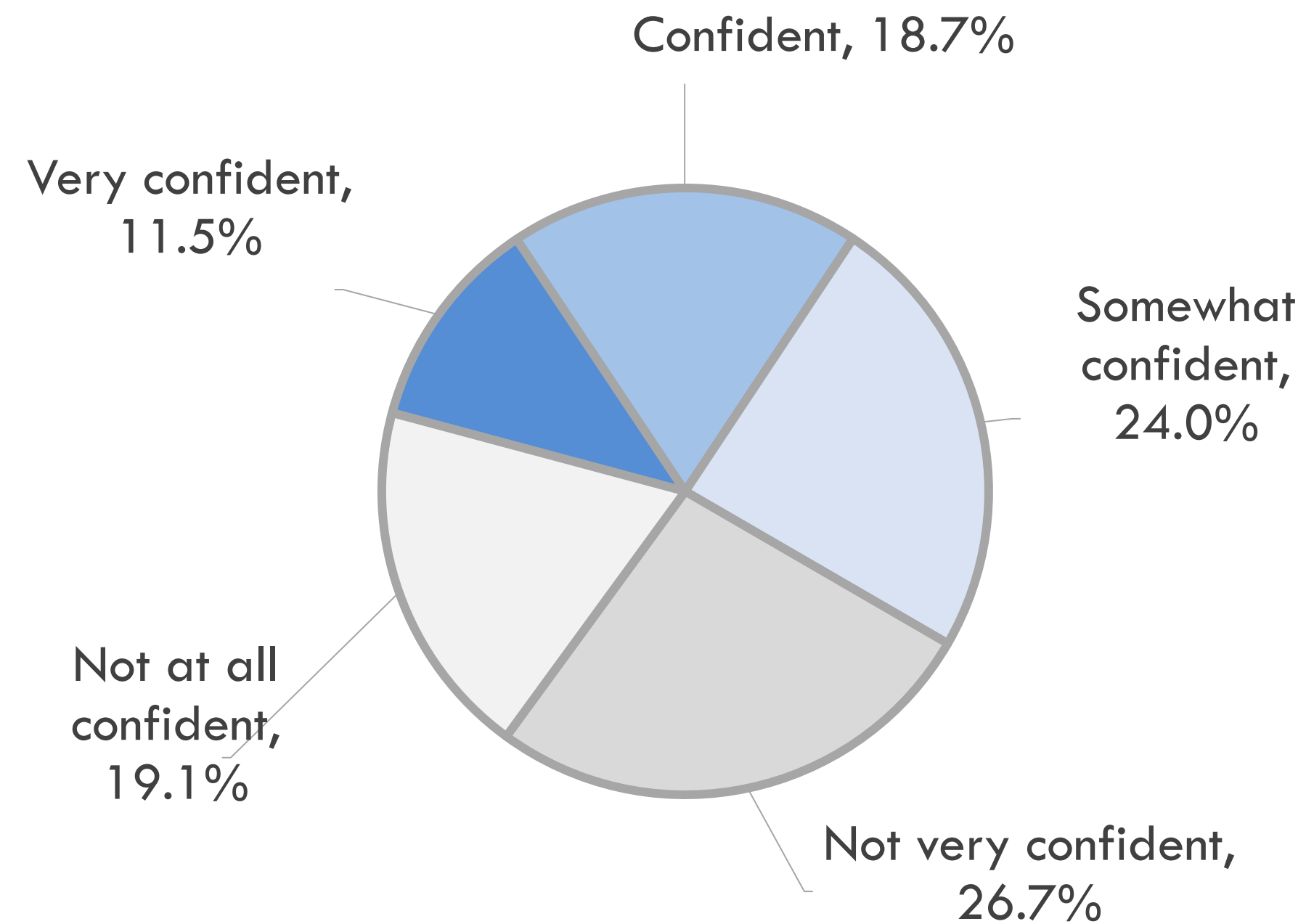
(Base: Waves 22-27. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

Historical data



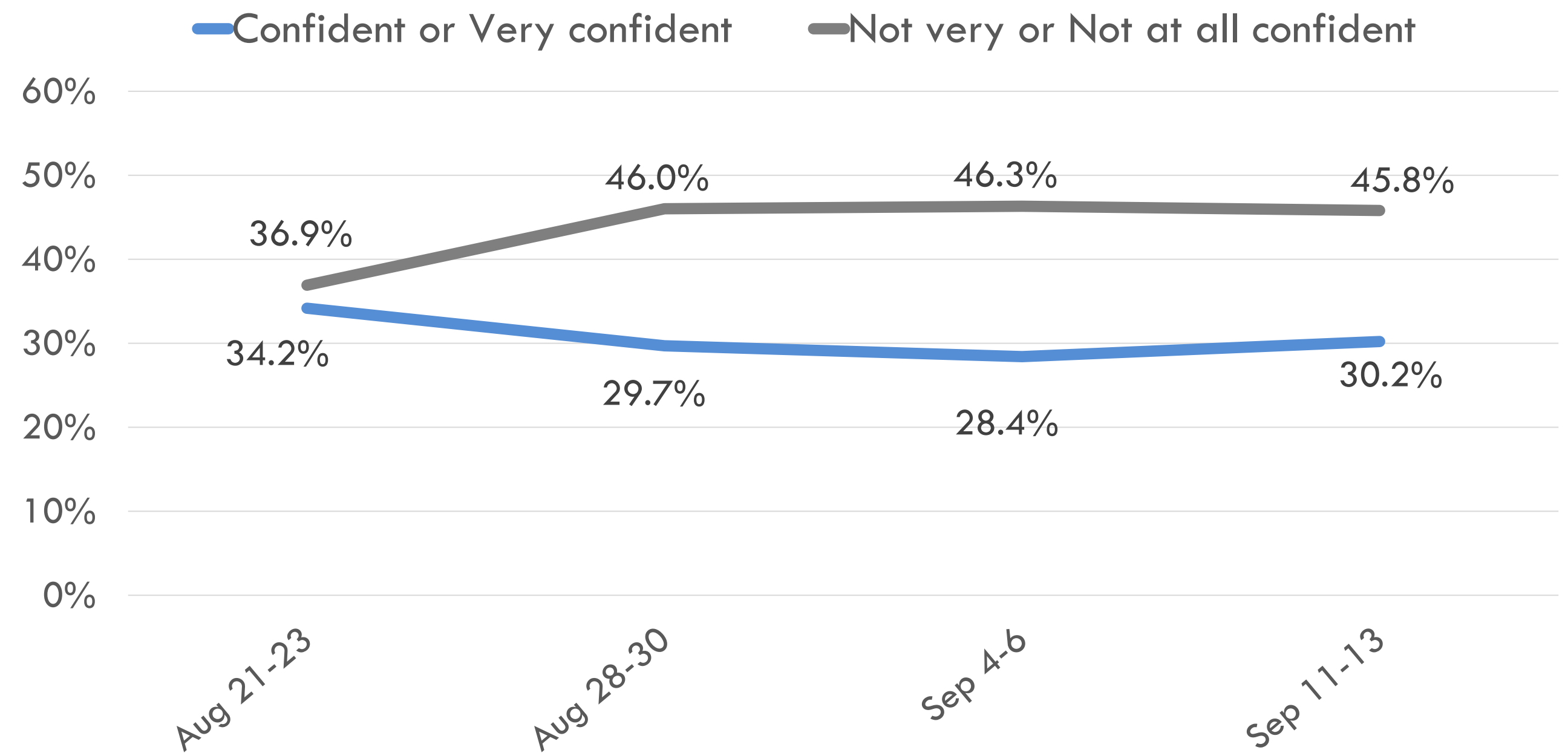
CONFIDENCE IN TRAVELING SAFELY

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



(Base: Wave 24-27 data. All respondents, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

Historical data





Coronavirus Travel Sentiment Index

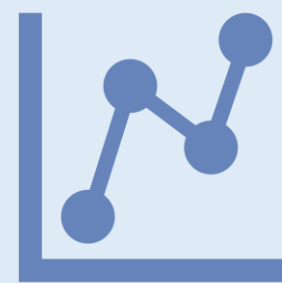
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 14th

What is a Predictive Index?



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



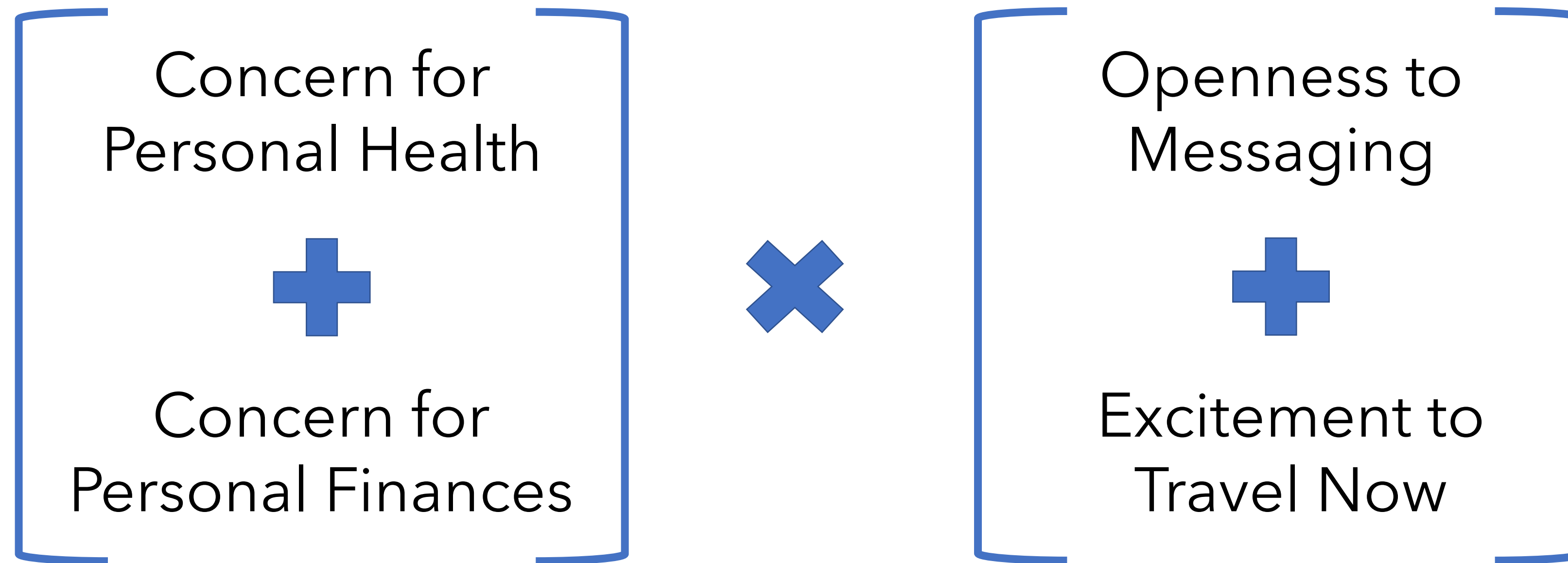
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

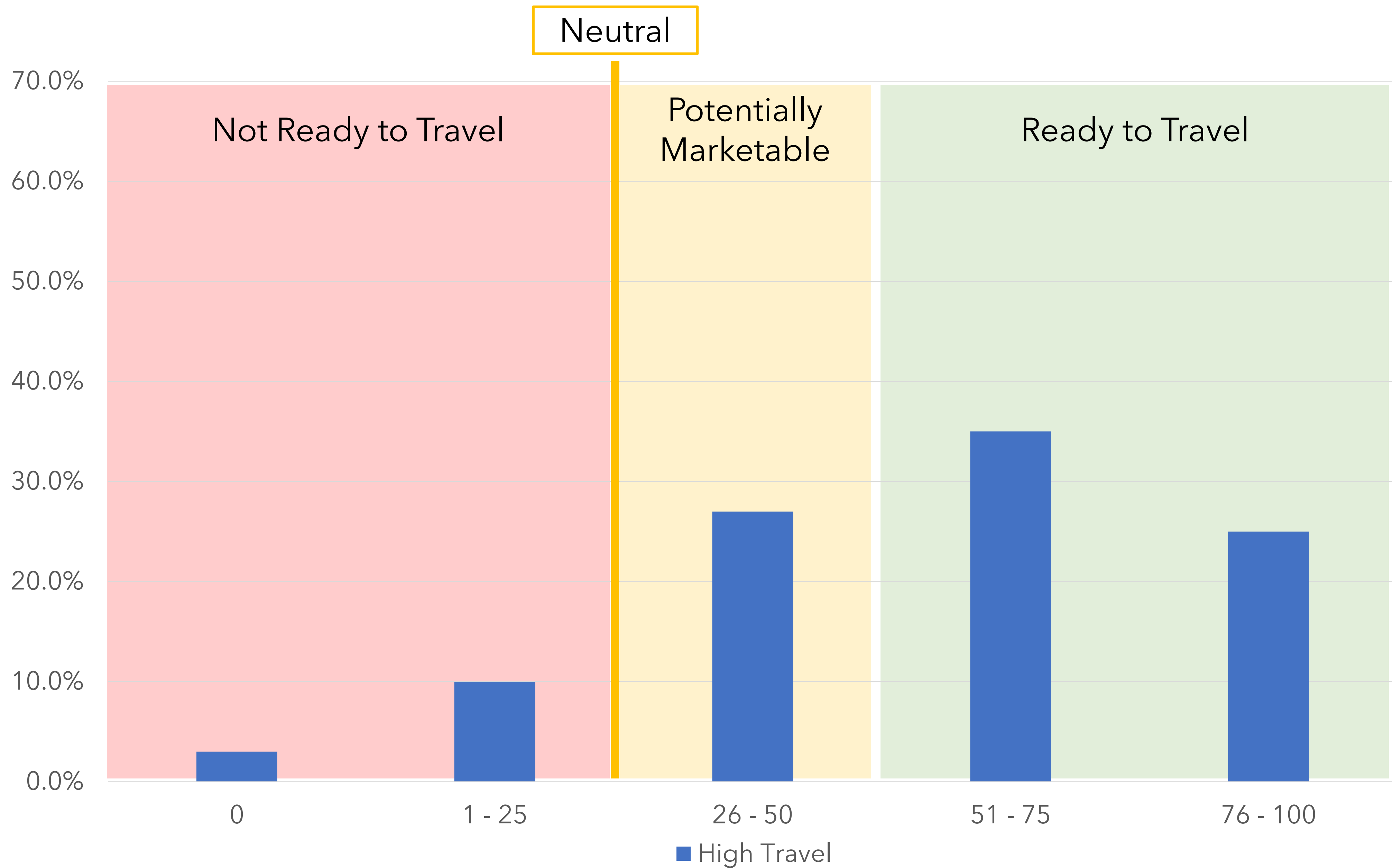
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



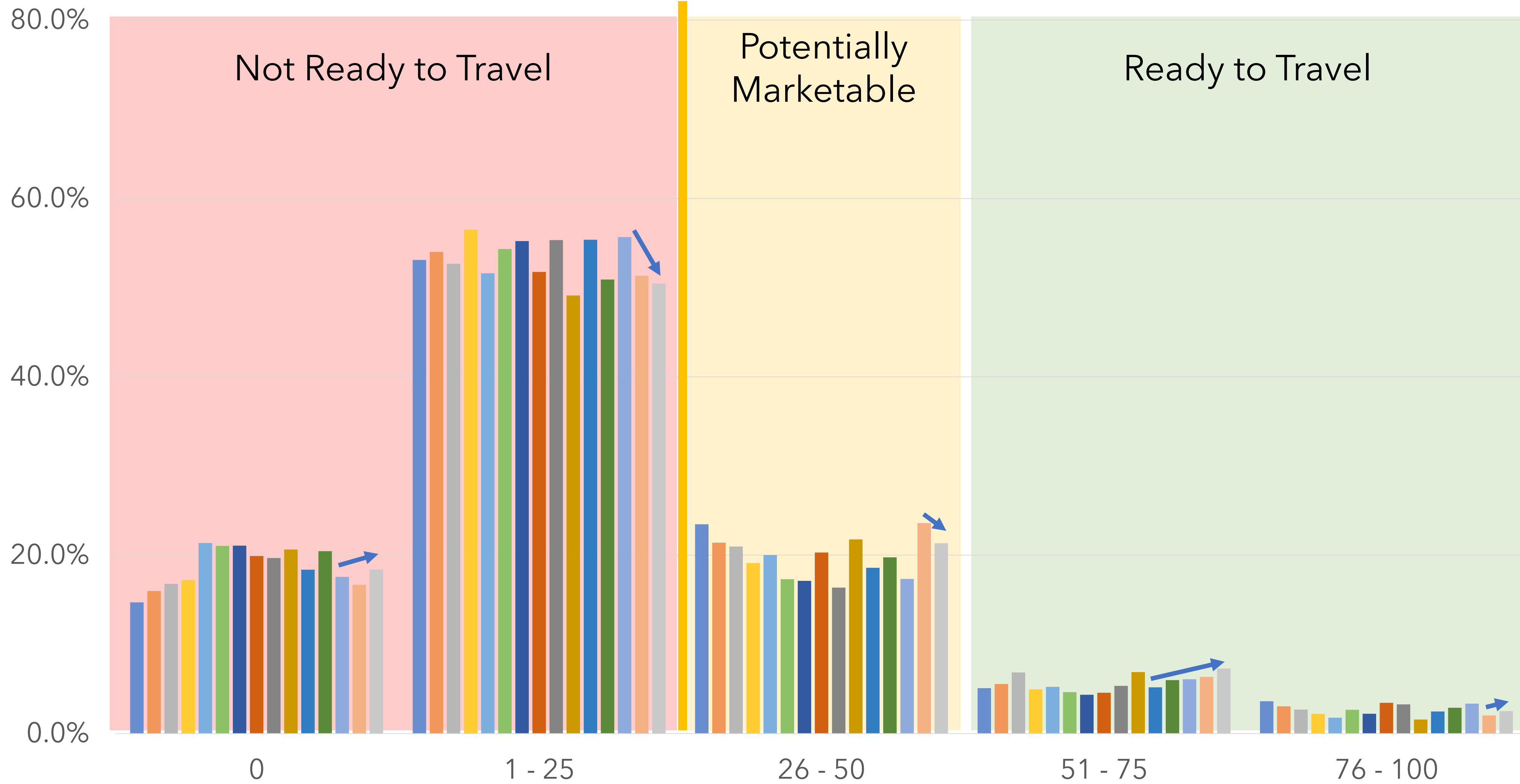
*Normalized to a 100pt scale

Healthy Travel Outlook

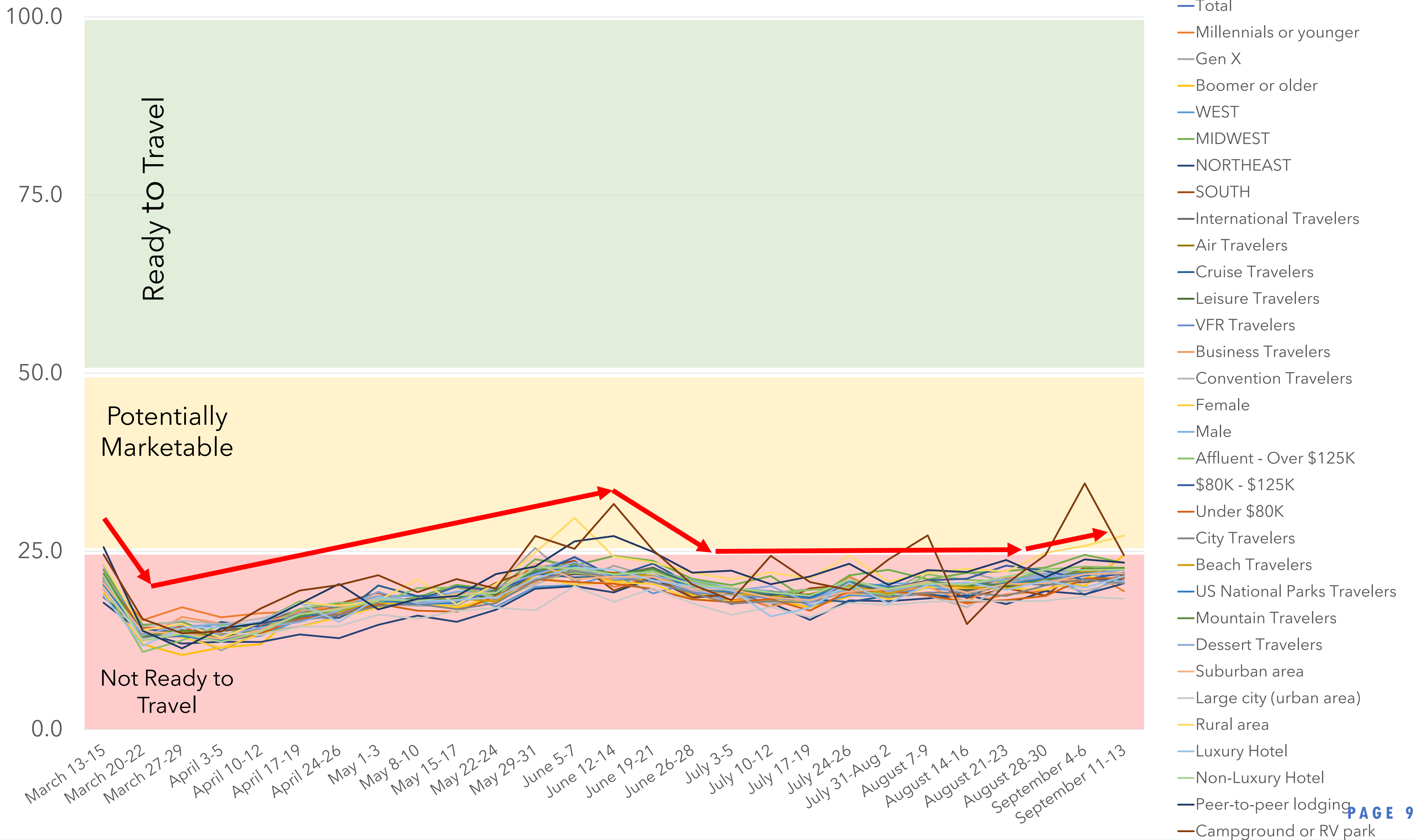


Travel Outlook

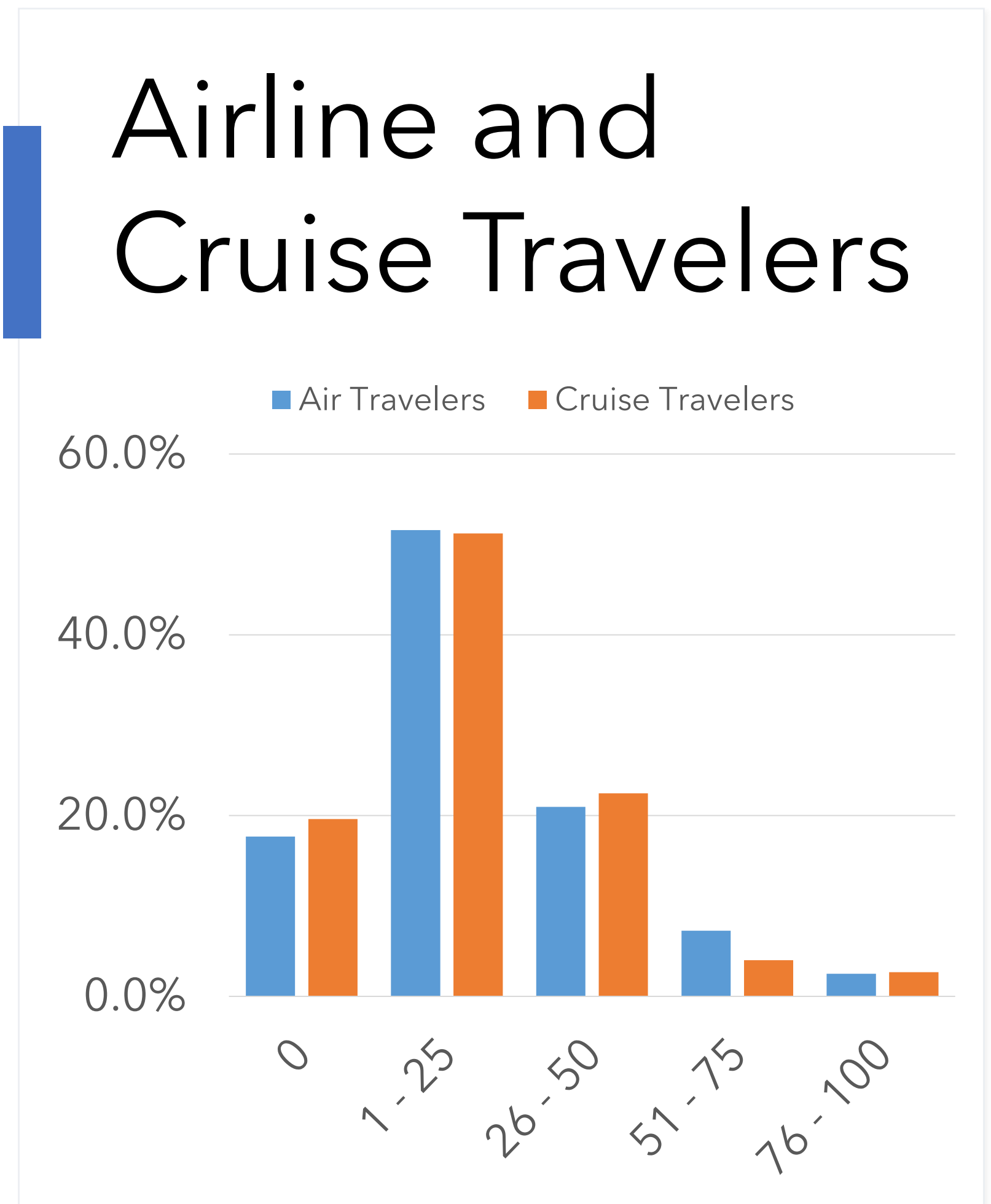
Neutral



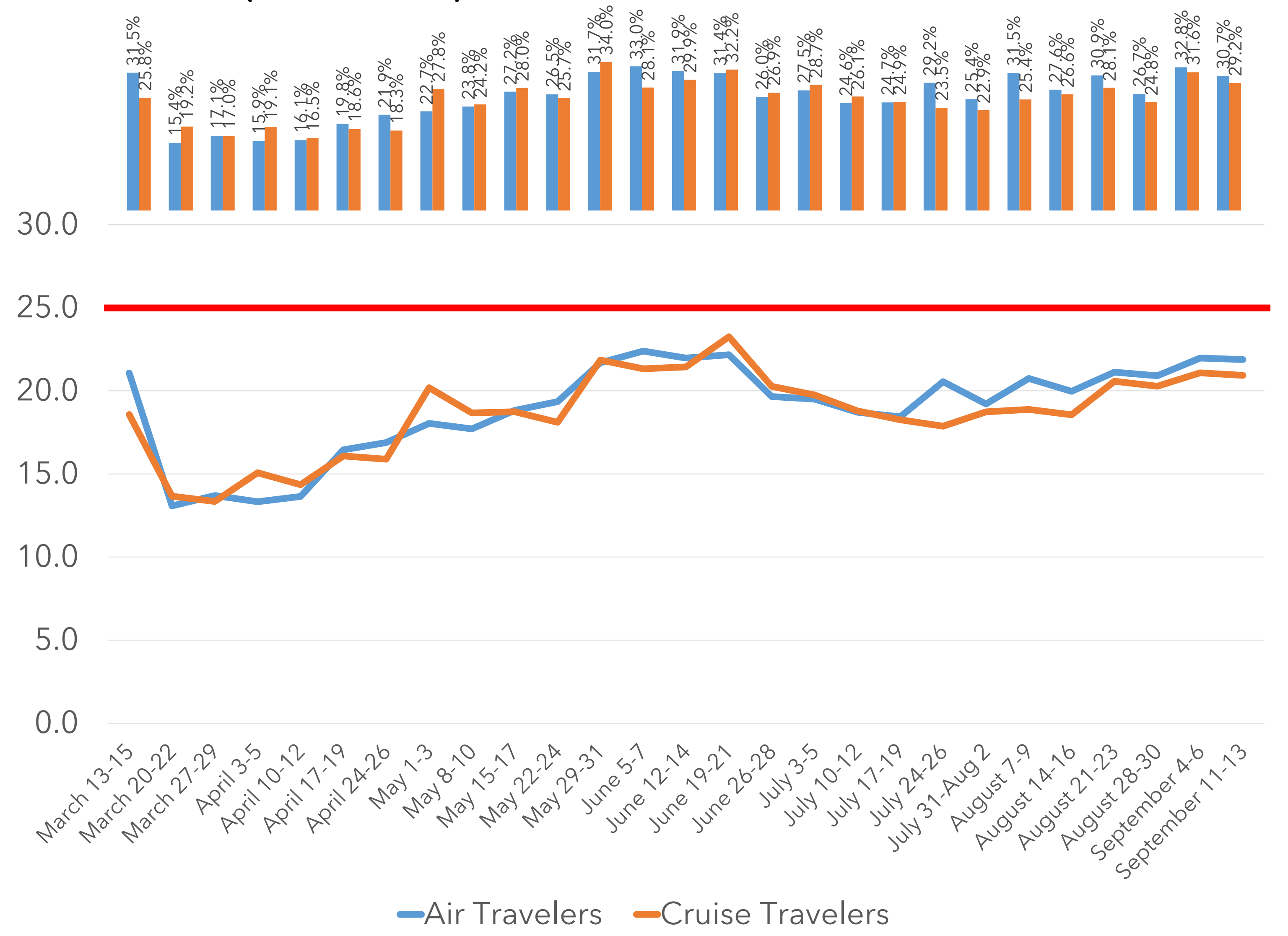
- June 5-7
- June 12-14
- June 19-21
- June 26-28
- July 3-5
- July 10-12
- July 17-19
- July 24-26
- July 31-Aug 2
- August 7-9
- August 14-16
- August 21-23
- August 28-30
- September 4-6
- September 11-13



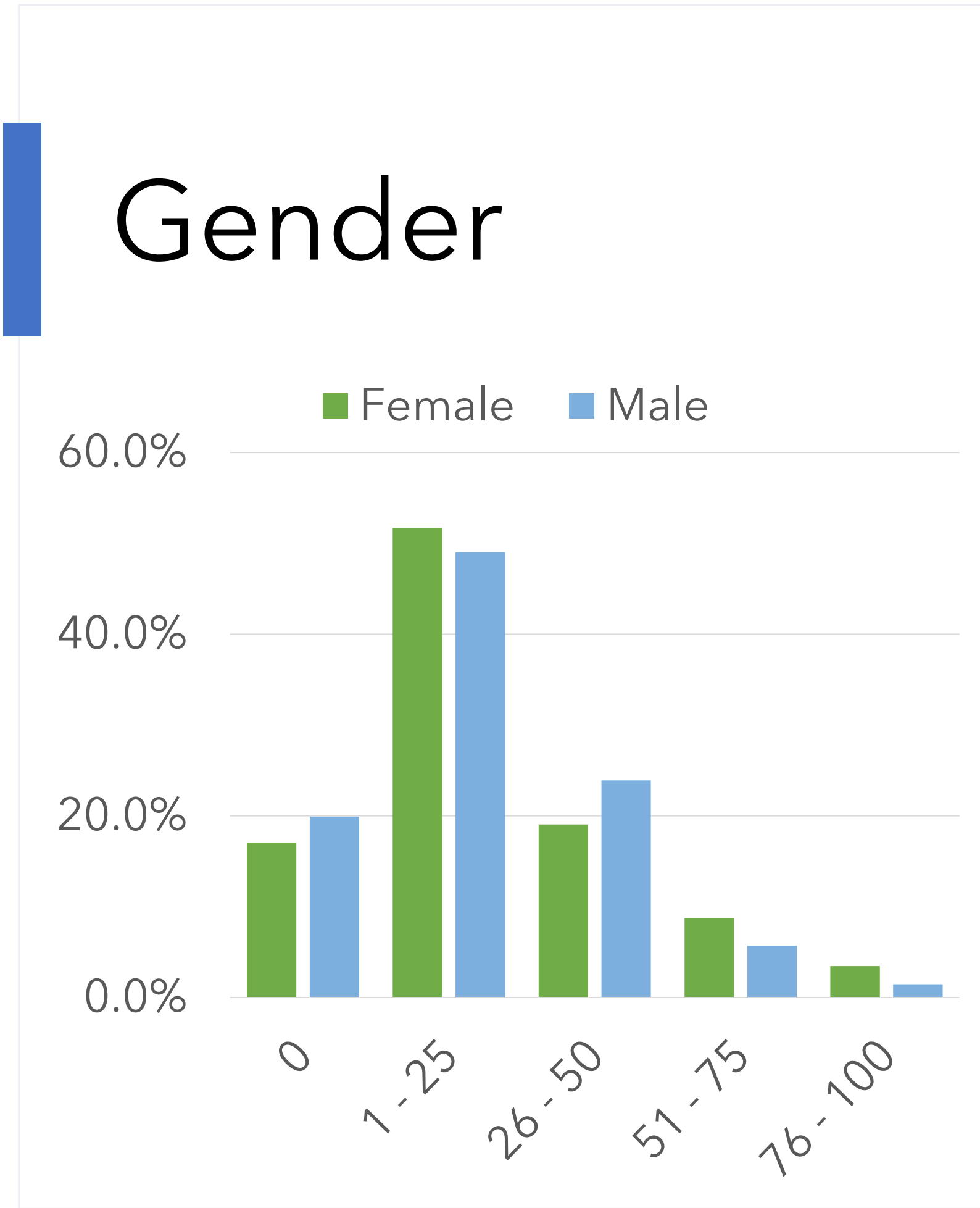
Airline and Cruise Travelers



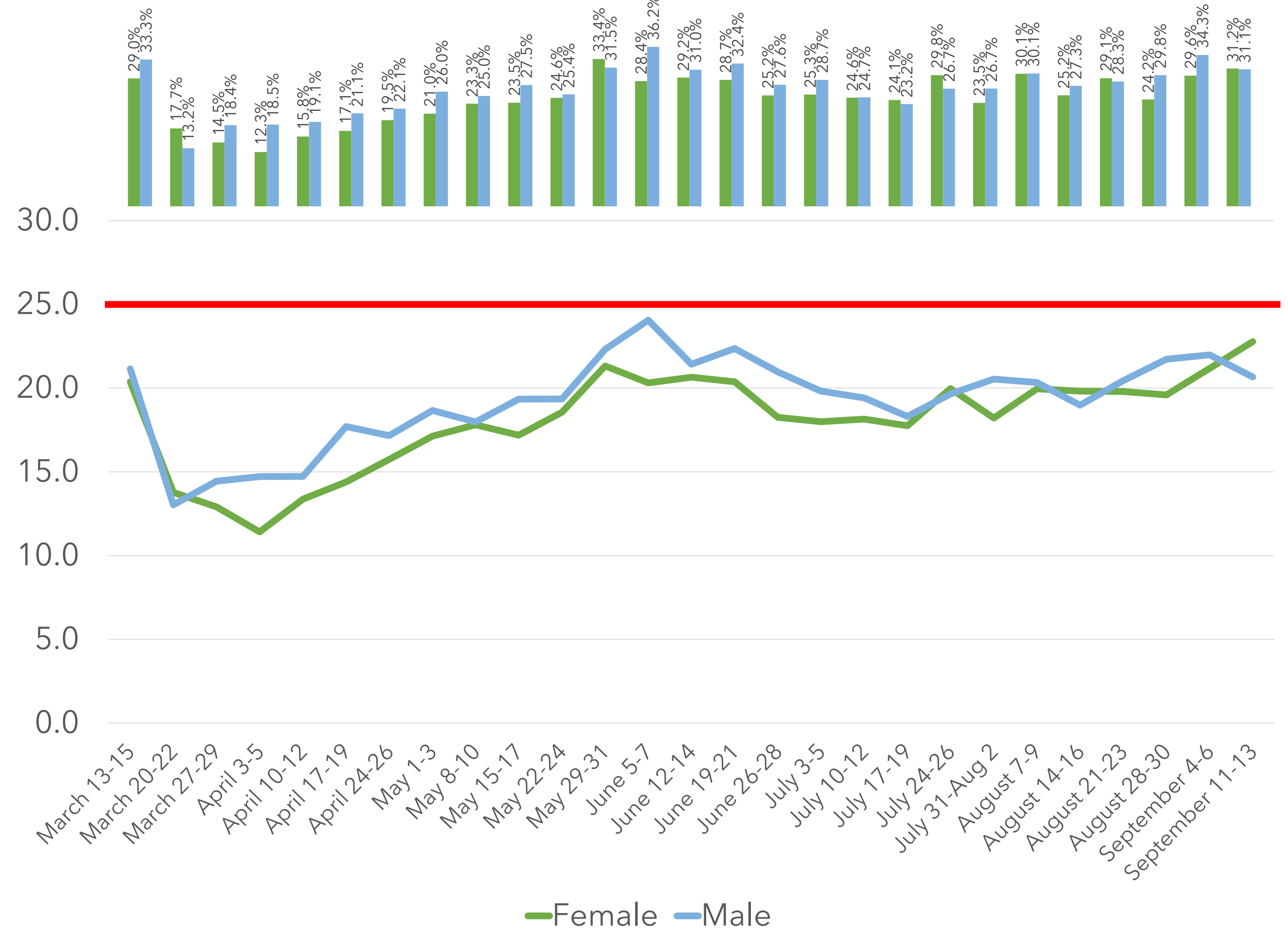
**Percent Potentially Marketable
(Index Above 25)**



Gender

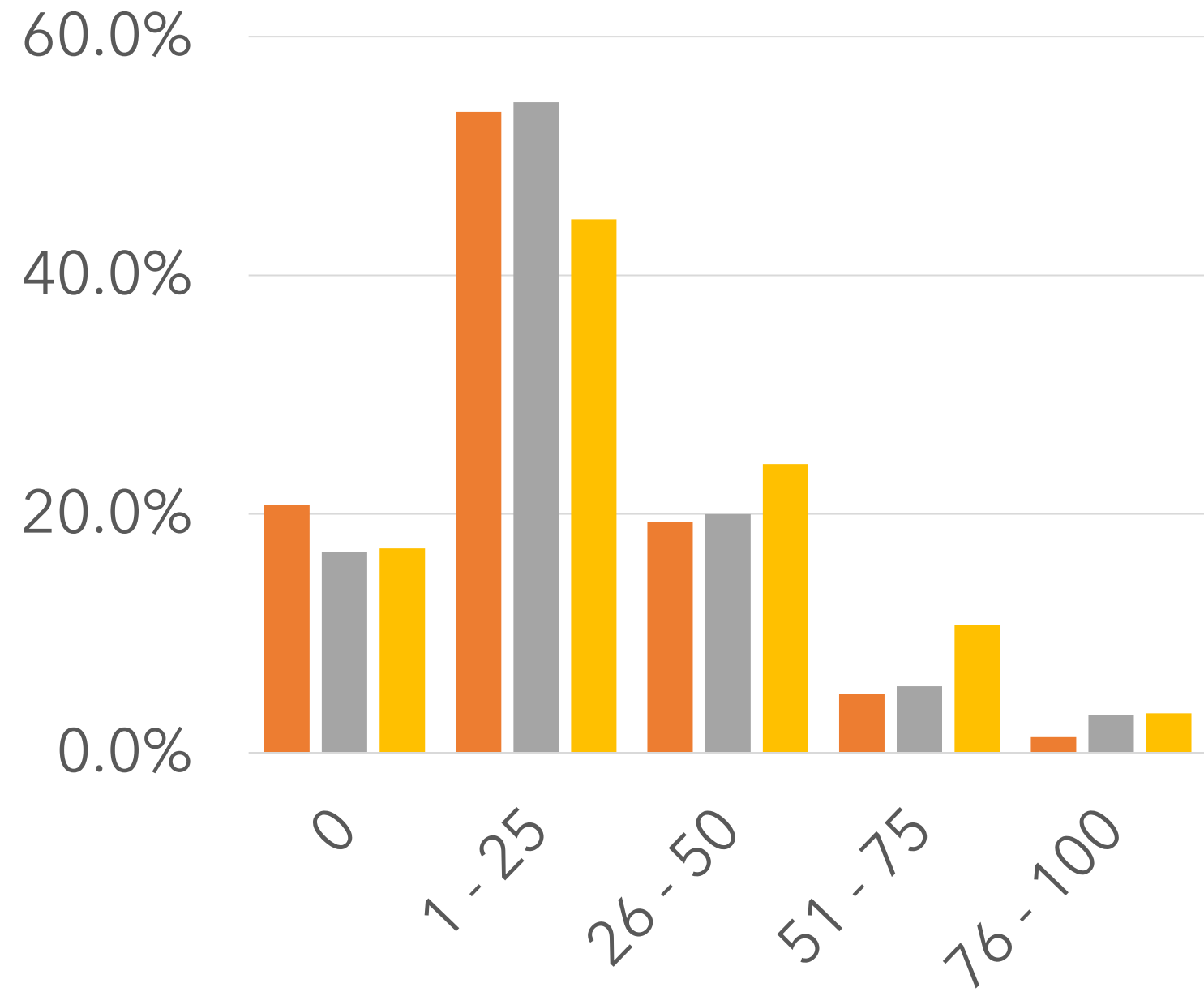


Percent Potentially Marketable (Index Above 25)

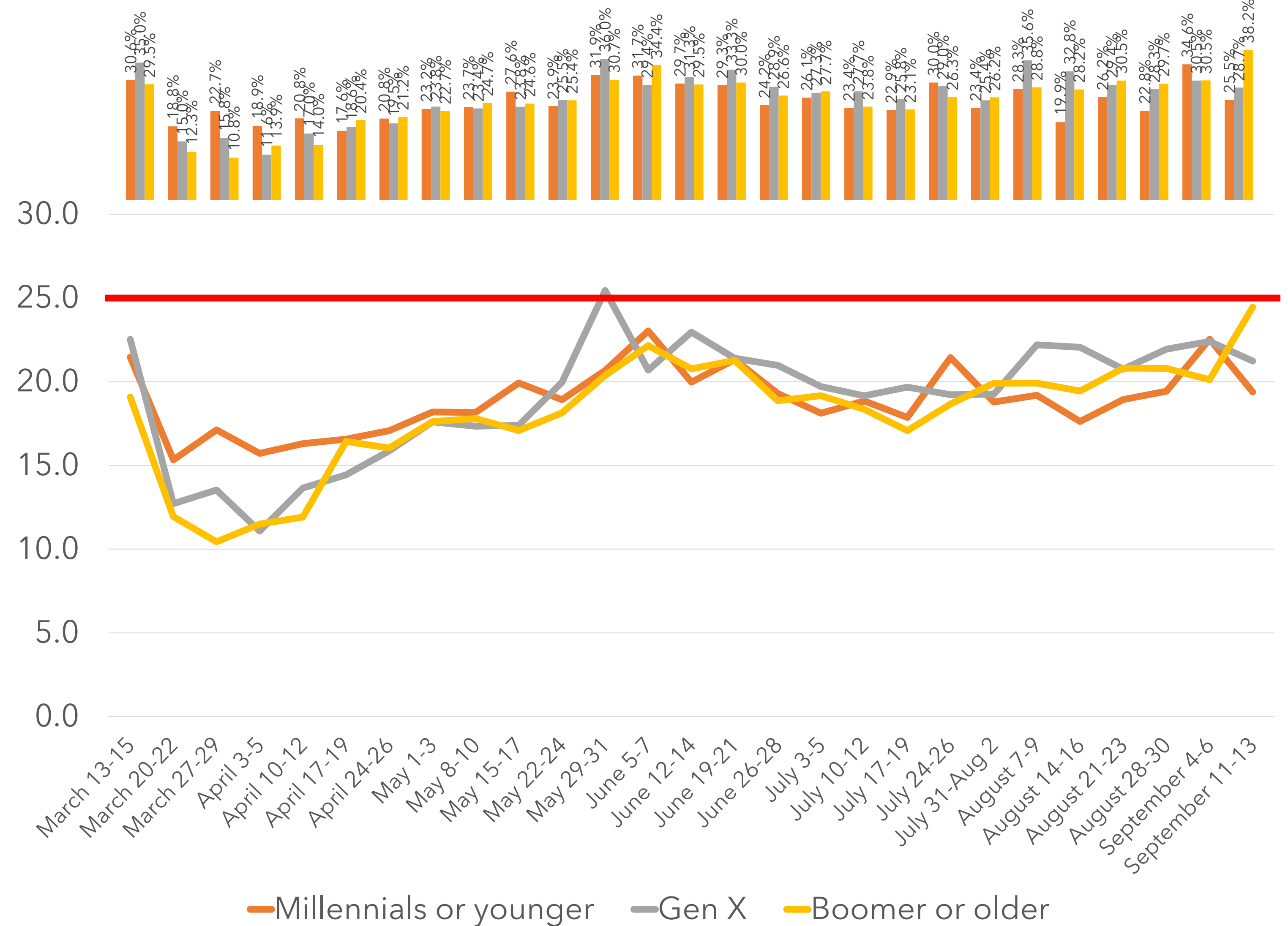


Generation

Millennials or younger Gen X Boomer or older

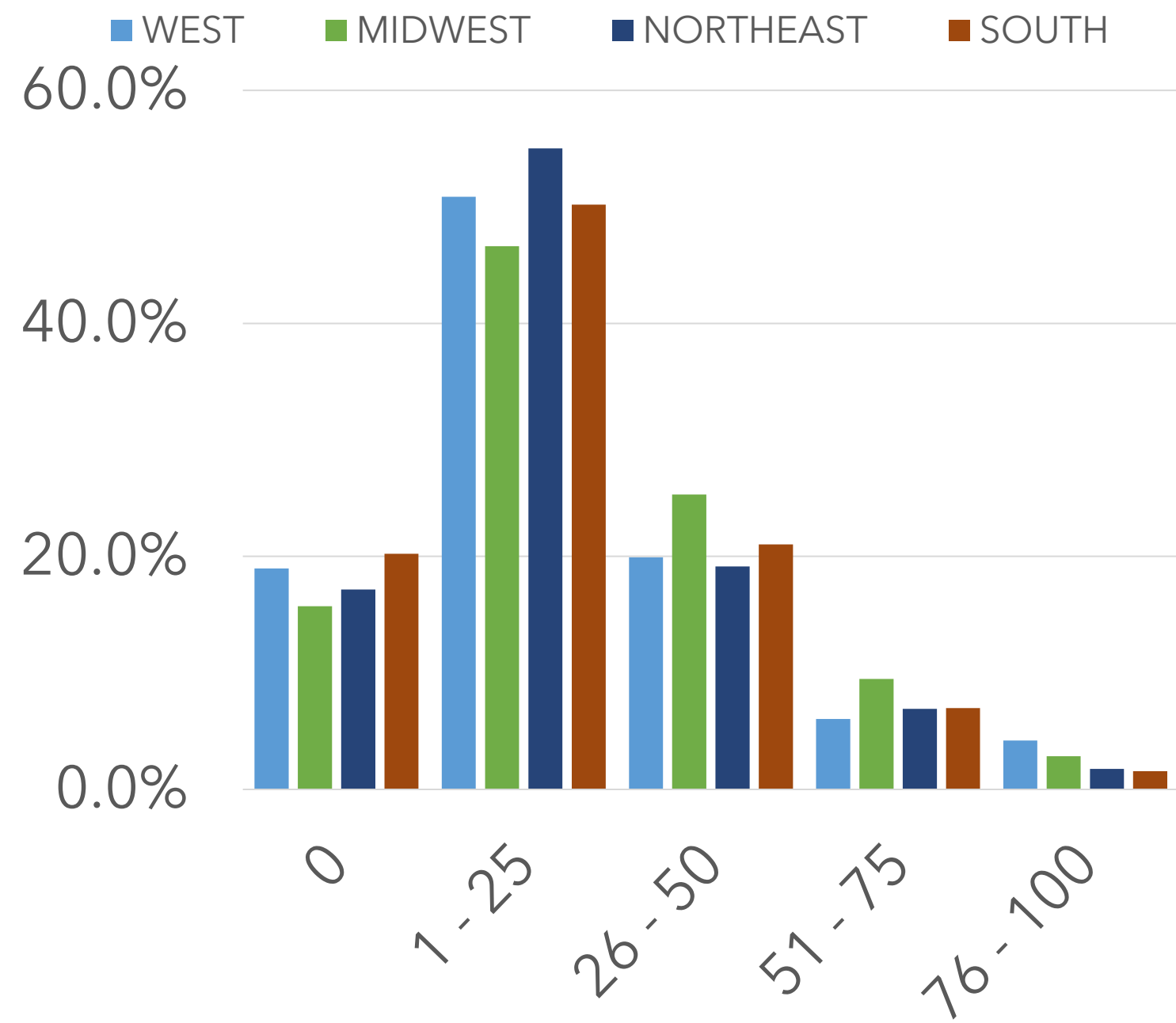


Percent Potentially Marketable (Index Above 25)

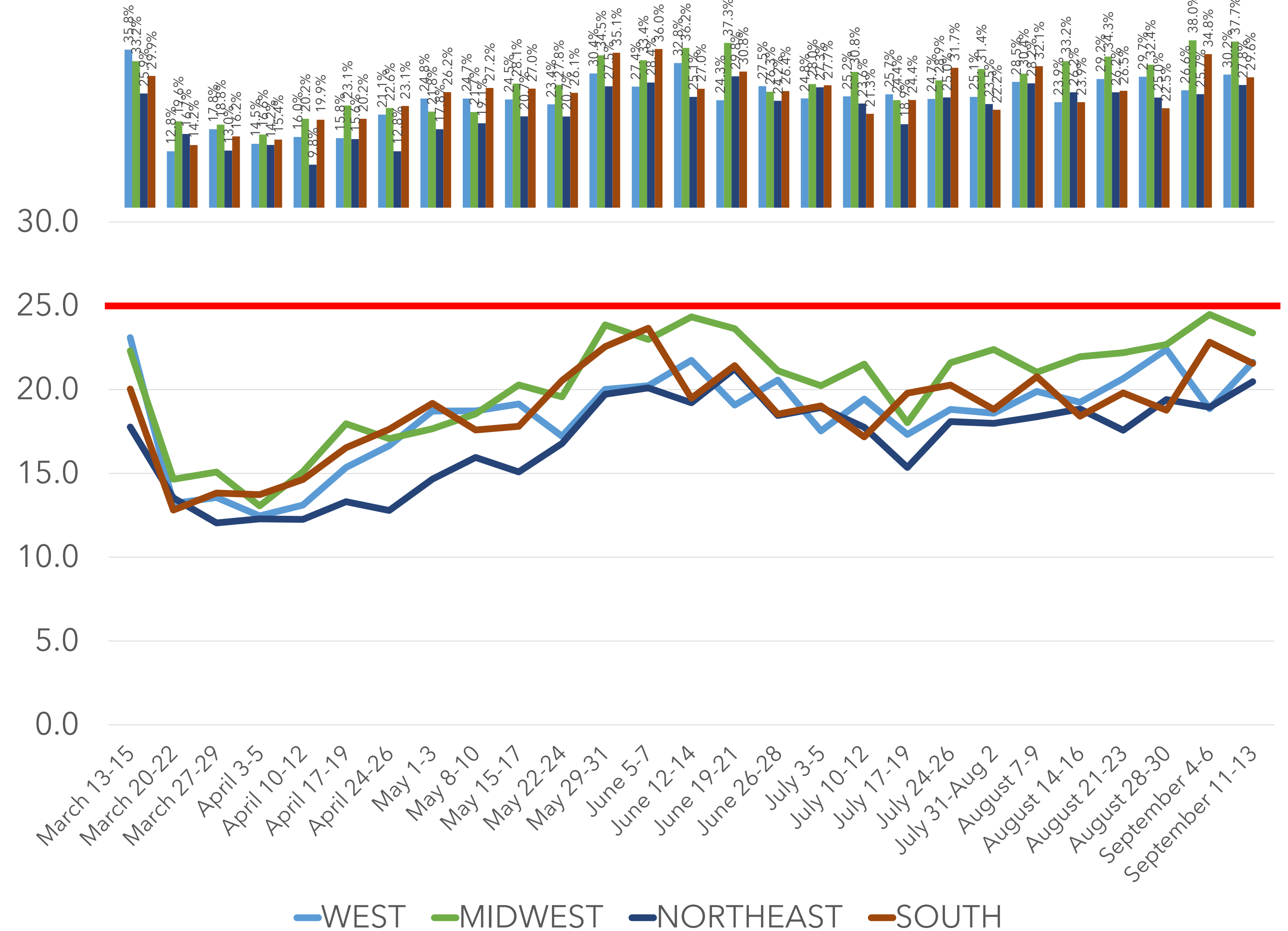


Millennials or younger Gen X Boomer or older

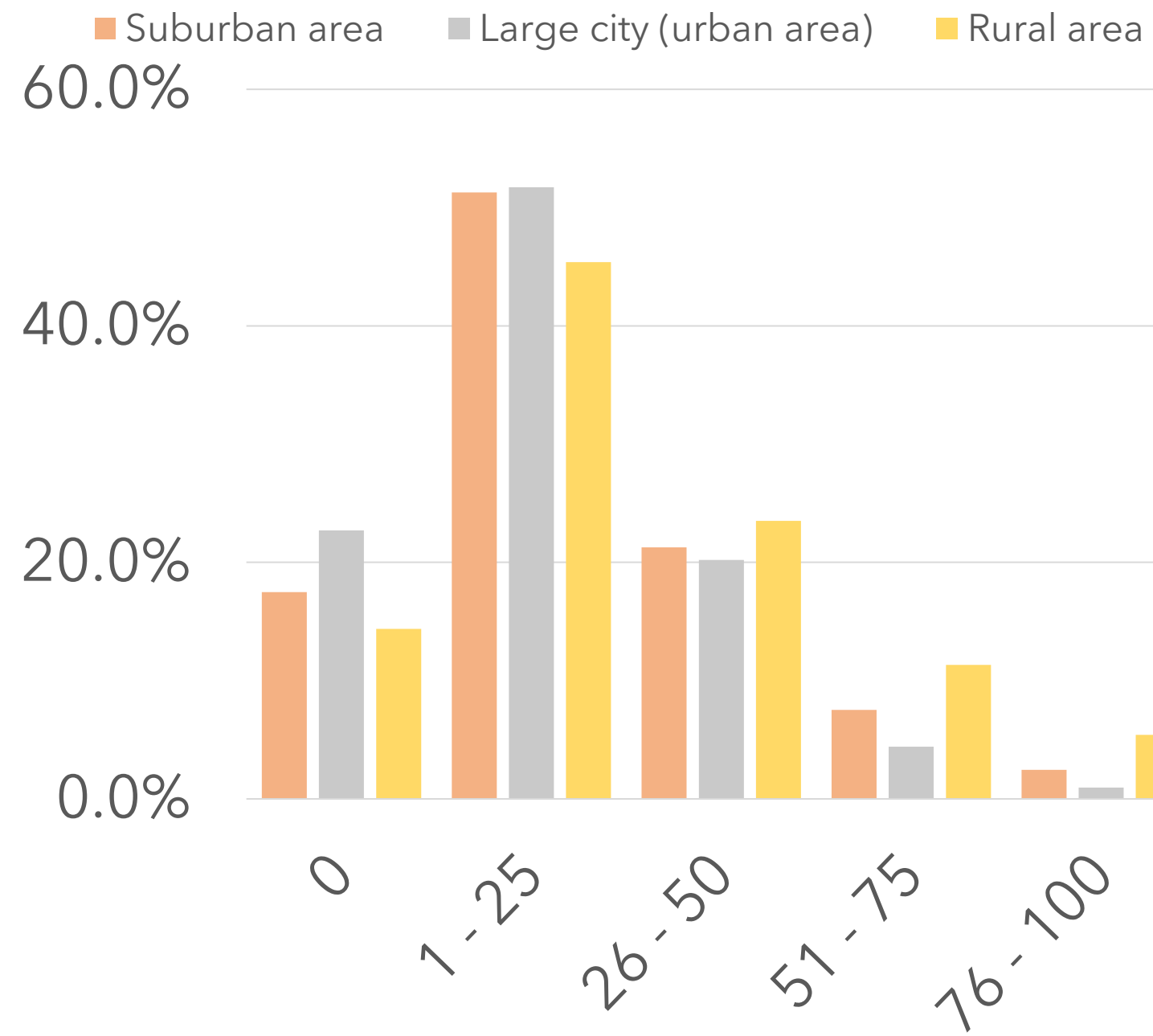
US Regions



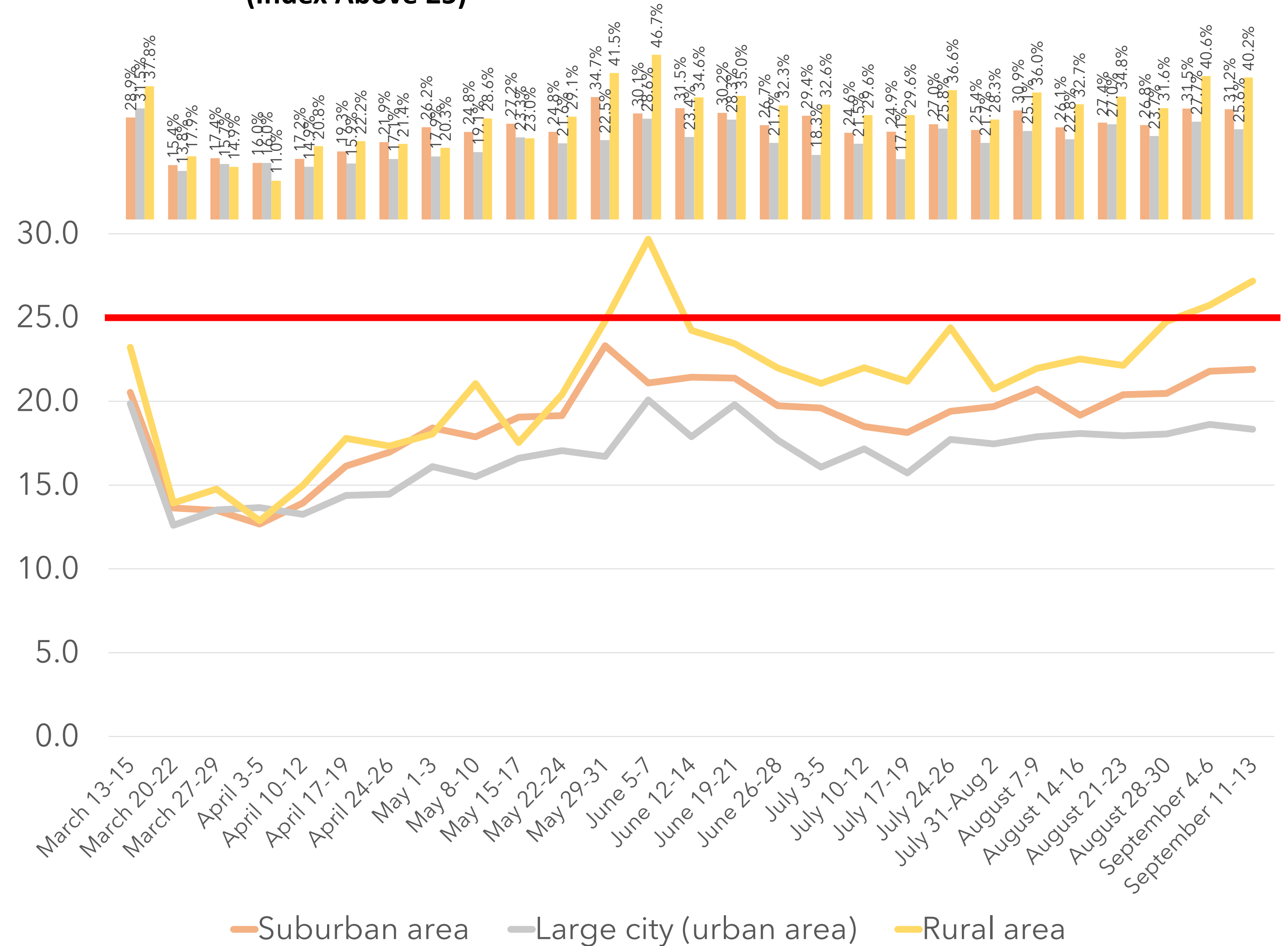
Percent Potentially Marketable (Index Above 25)



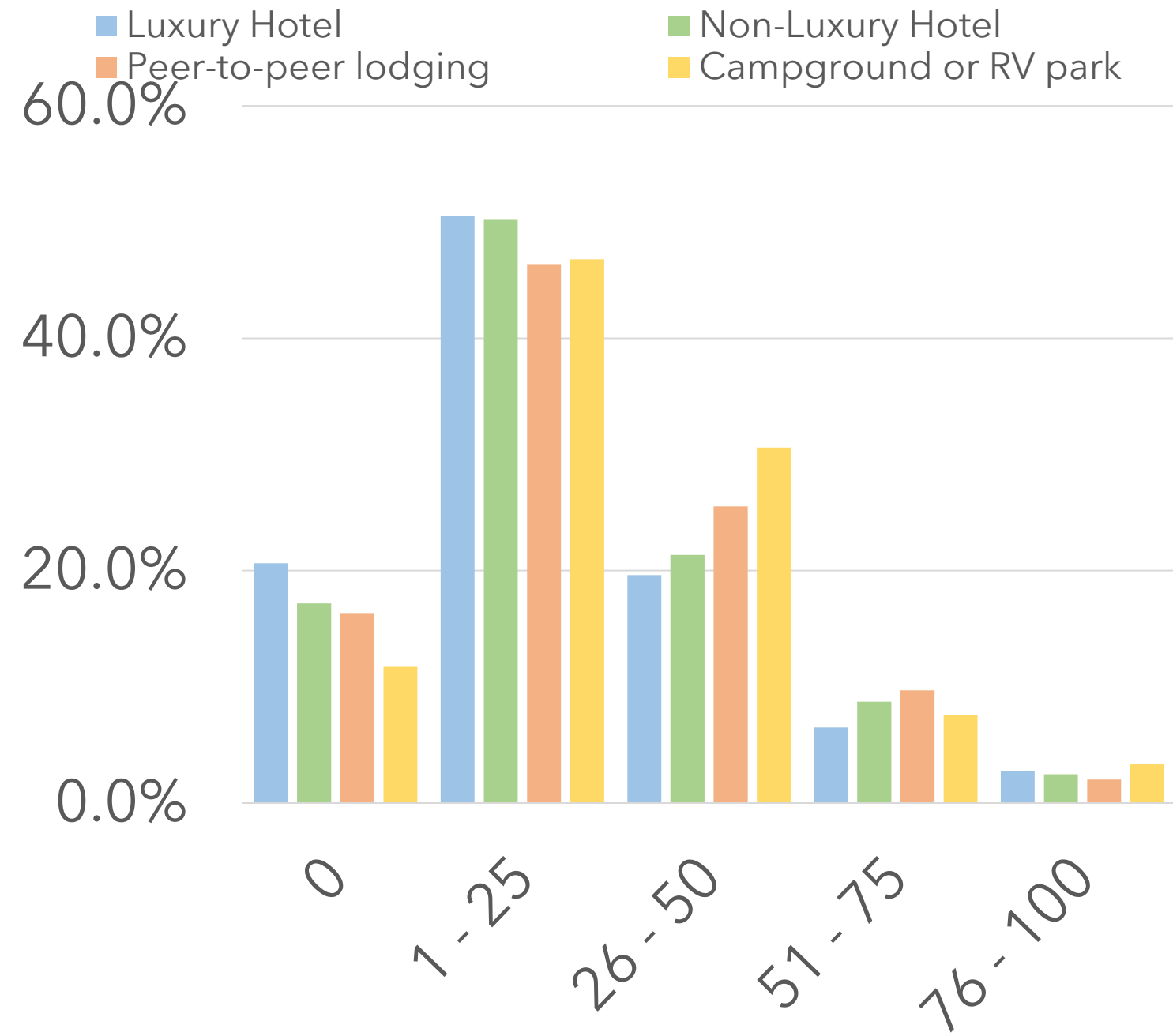
Residence Type



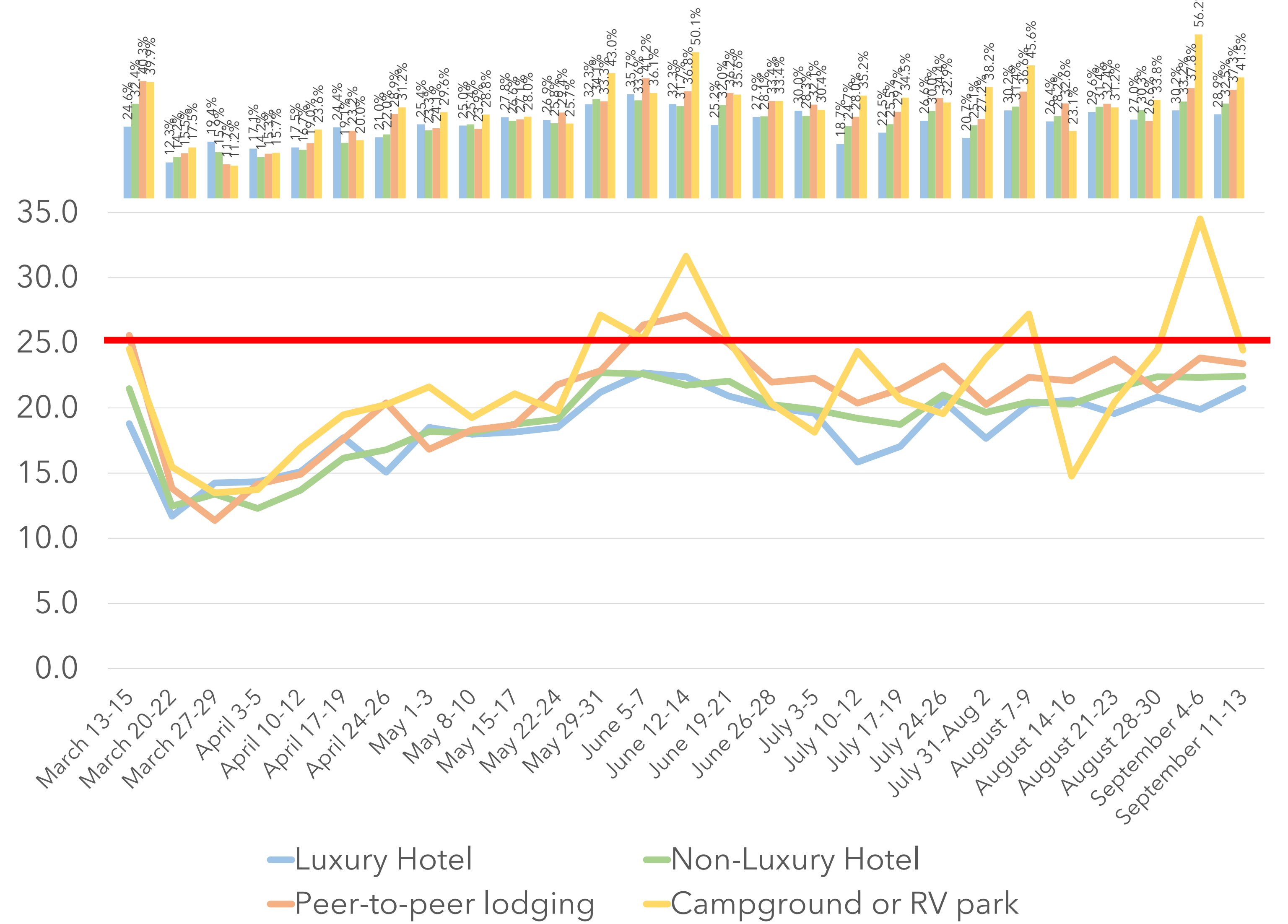
Percent Potentially Marketable (Index Above 25)



Lodging Preference



Percent Potentially Marketable (Index Above 25)



ACCESSING DATA IN THE ONLINE DASHBOARD

08:54:30
VOICE FEED: NETWORK: 12.38.73

Evolution:

Actual vs Target

SECURITY

PROFILE:

PROJECT:

MISSION

ADDRESS:

Data Availability

KPI: Product

FRONT-CAMERA-IP: 143.453.00

01:43:55

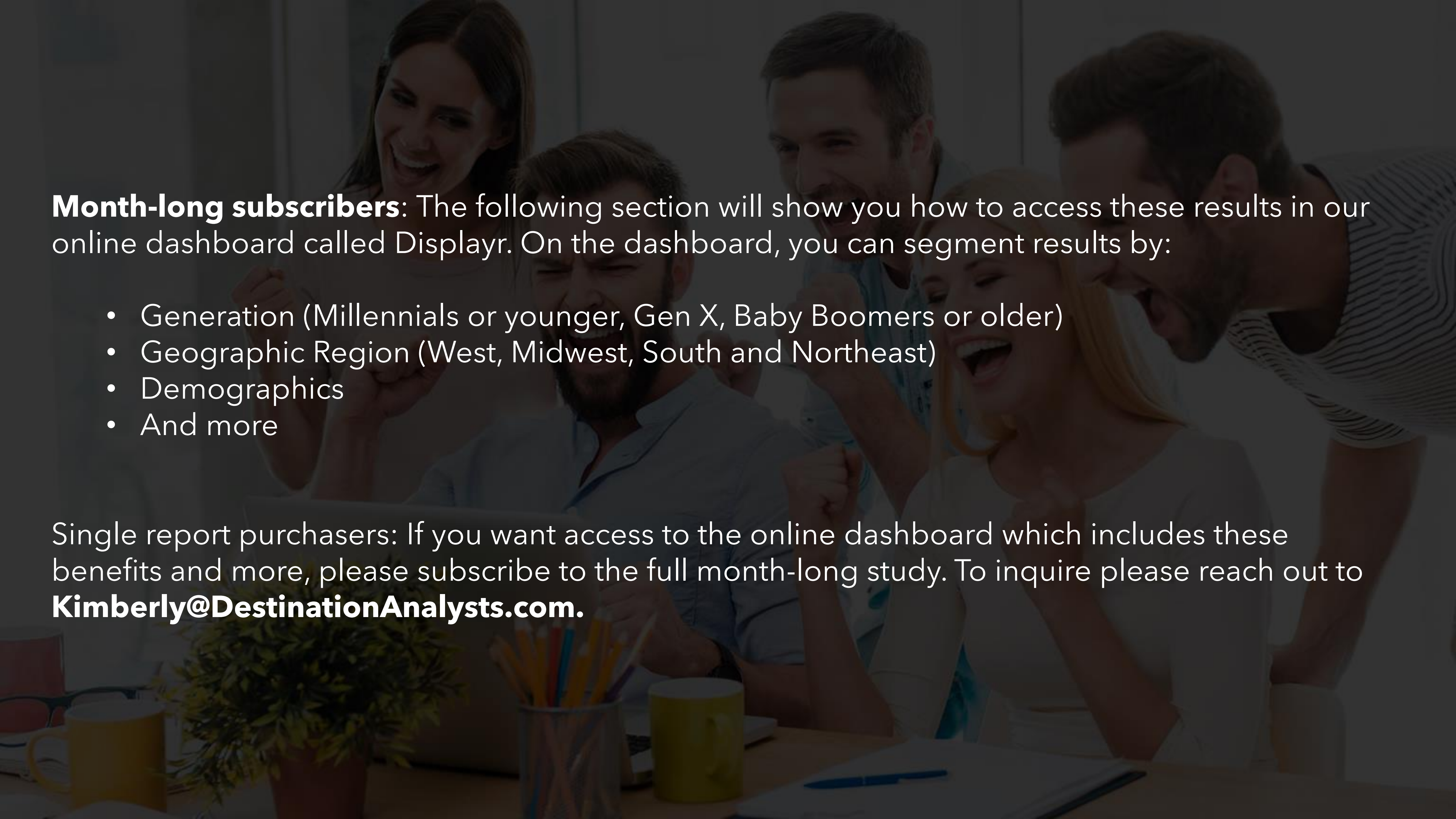
Market Share

Customers Satisfaction

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

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

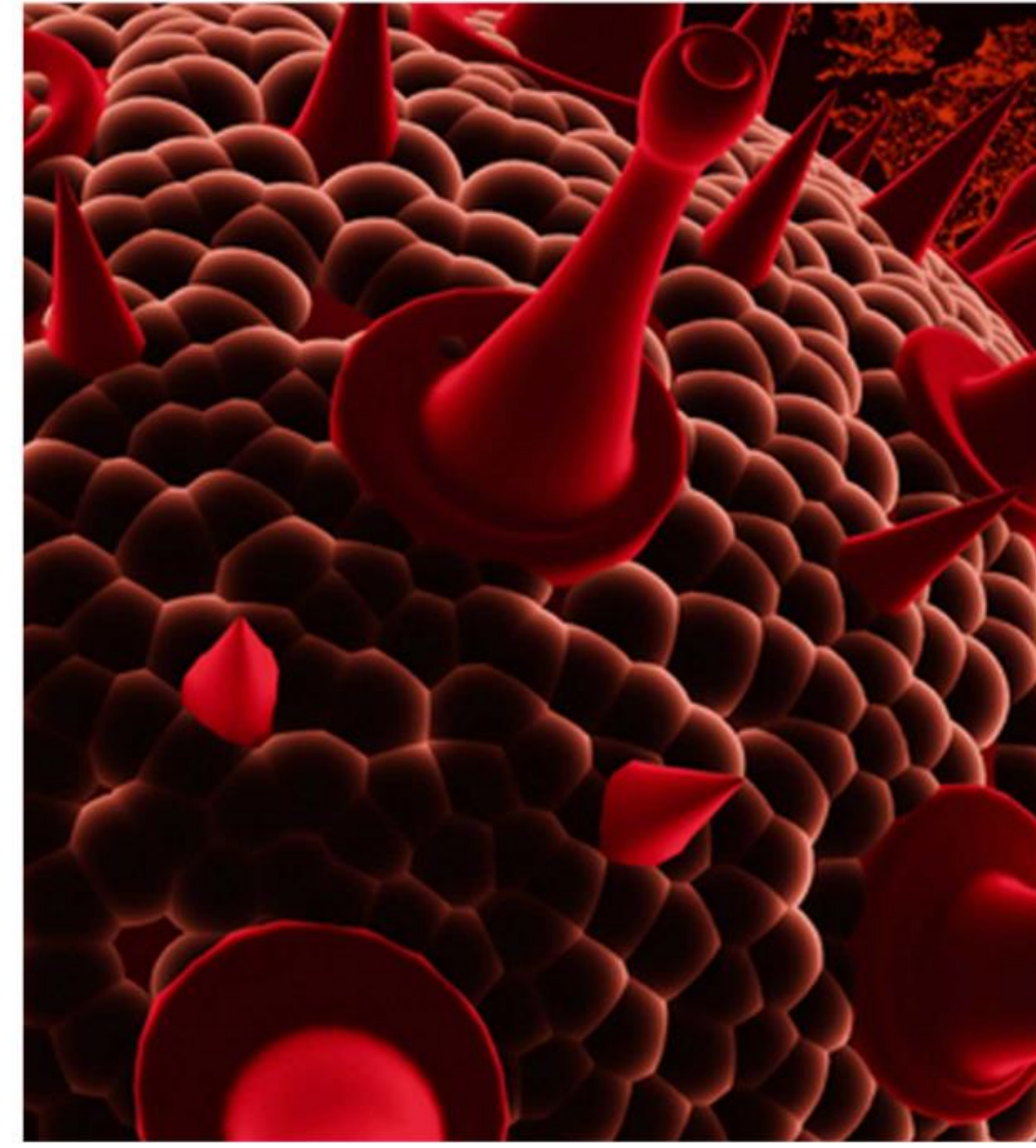
Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ?

Search...

- + 65%

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

NAVIGATING THE REPORT:

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

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

Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ? - + %

- 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.

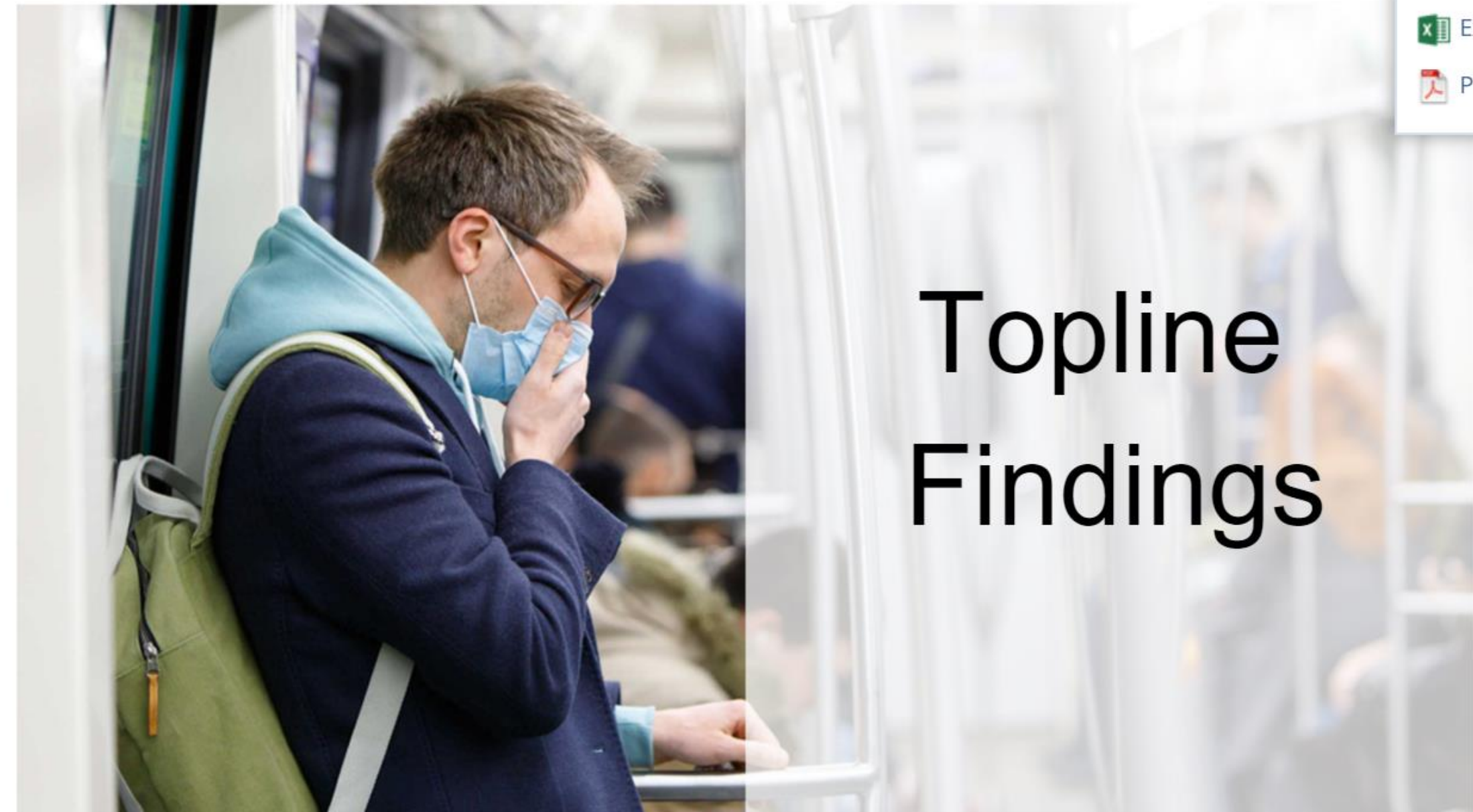
EXPORTING THE DATA:

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 - Breako
 - 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



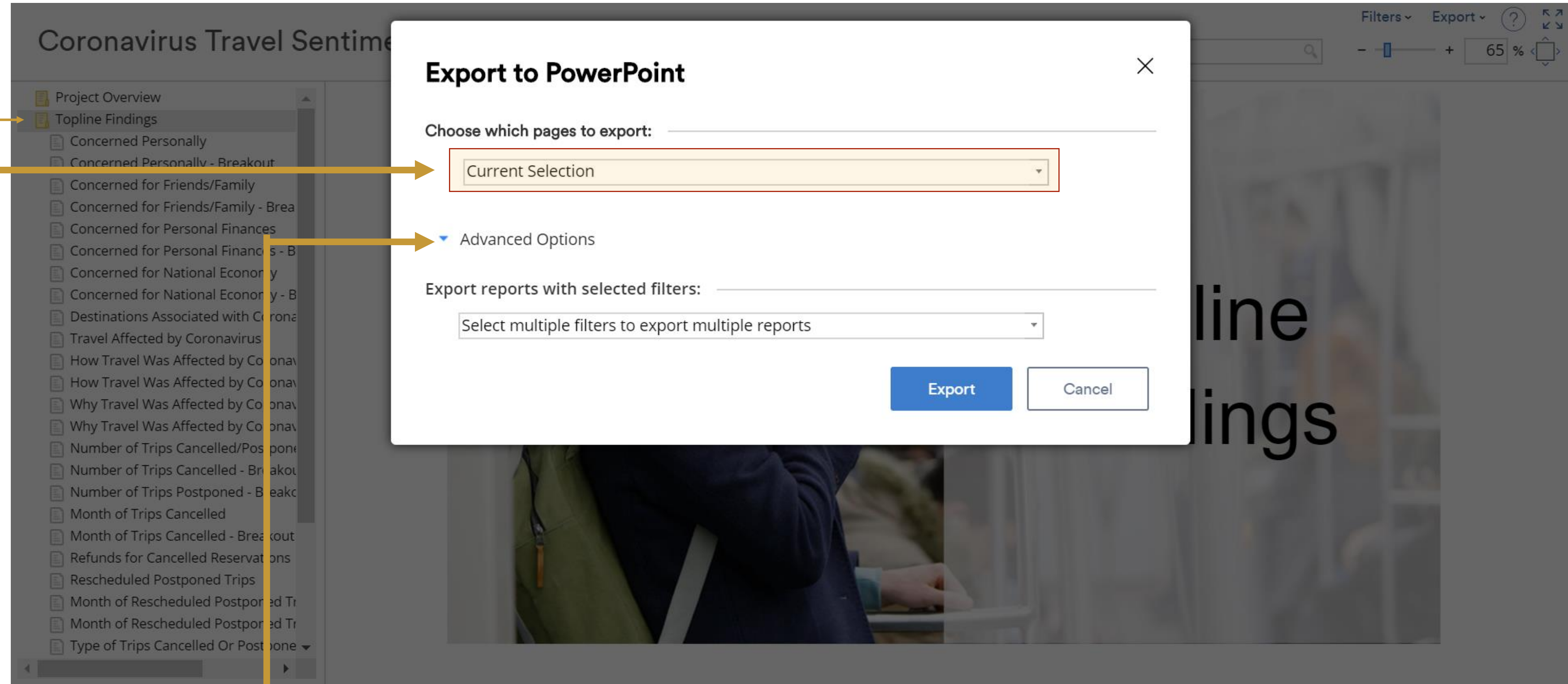
Topline Findings

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

