CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 28

RESEARCH FINDINGS

September 21, 2020

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 28th 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 28th wave of this survey was collected from September 18th – 20th, 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, 1,200 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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.
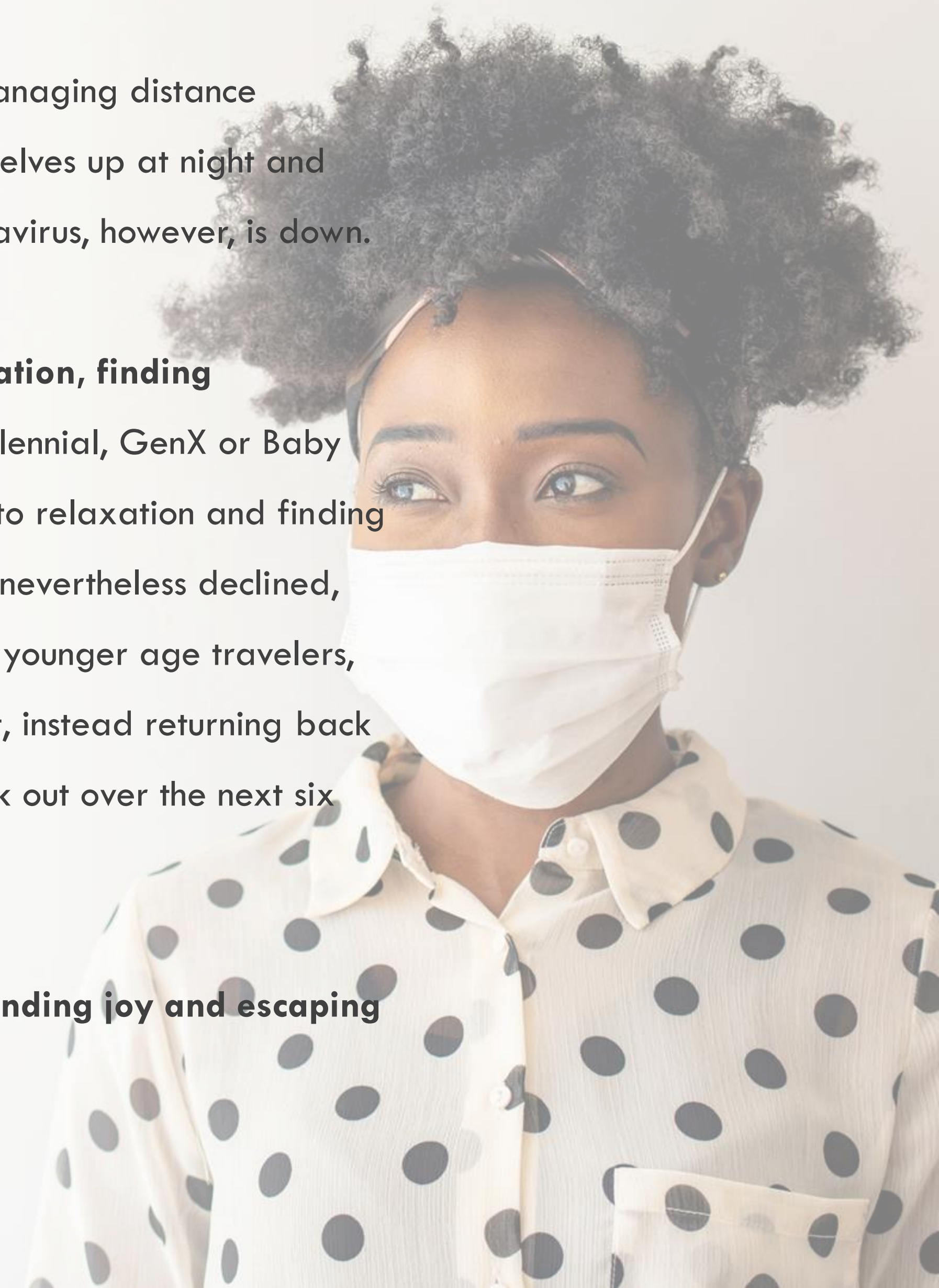
Map of U.S. Showing Survey Regions:
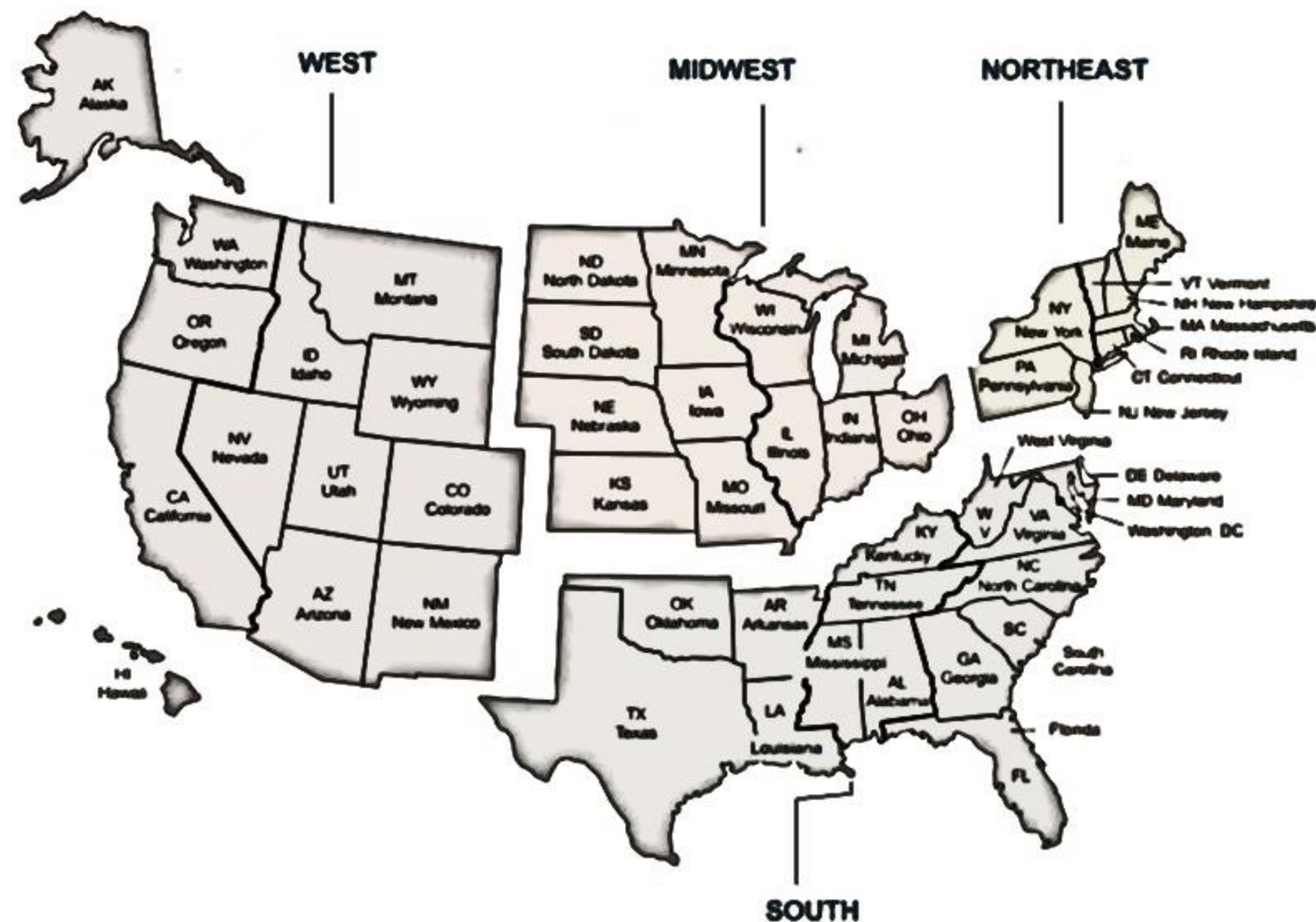
	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
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

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TOP TAKEAWAYS

The following are the top takeaways that emerged from Wave 28 of this weekly consumer traveler sentiment tracking study.

- **Currently, 47% of American travelers feel a high degree of stress in their daily lives.** Be it from managing distance learning for children to navigating extreme weather, Americans are a little likelier to be keeping themselves up at night and feeling tired than they were a few months ago. While stress is up, the propensity to worry about coronavirus, however, is down.

- **Since April, and amidst rising stress, more Americans are reporting stronger prioritization of relaxation, finding joy/happiness, and—especially important for travel—having new experiences.** Whether GenZ, Millennial, GenX or Baby Boomer, the generations are all in agreement on the prioritization of emotional well being, in addition to relaxation and finding joy/happiness. While staying safe from infection is also a top lifestyle priority across the board, it has nevertheless declined, most notably for Boomers, who have instead increased their focus on relaxation. Among Millennial and younger age travelers, escaping from stress and connecting with others are not quite as strongly priorities as was felt in August, instead returning back to May levels. GenX-age travelers are the likeliest to be prioritizing connecting with nature as they look out over the next six months of their lives.

- **Those who are already traveling (or ready to without hesitation) are far likelier to be prioritizing finding joy and escaping from boredom compared to other Americans.**

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- **With these patterns in both continued and shifting lifestyle priorities, openness to travel continues to bloom.** As has been for the last month, over 54% of Americans identify with being in a "ready to travel" mindset versus needing more time. American travelers' level of excitement for learning about new travel experiences or destinations to visit is at a pandemic-period high—one last (and only other time) obtained at the end of May, at the start of the summer season.

- **Unlike early on in the pandemic, now less than 50% of American travelers consider staying in a hotel, Airbnb or home rental, dining in a restaurant, visiting an amusement park or other outdoor attraction, recreating outdoors and shopping to be unsafe.**

- **Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic.** Over half of American travelers continue to say they are at least somewhat confident they can travel safely in this environment. Now just 37% agree they need a vaccine to travel, down from a high of 45% at the start of August.

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TOP TAKEAWAYS

- **With these growing feelings of safety surrounding travel, less Americans are saying they are going to change the types of travel destinations they choose to visit post-pandemic.** In April nearly 40% of American travelers agreed they would change the destinations they traveled to, now less than 20% do—a 50% decrease. In addition, among those that are saying they will change the types of destinations they choose to visit, more positive reasons are being offered up as to why than in prior months, including an increased willingness to explore new destinations and crossing places off their bucket lists.

- **Finally, Americans are also less likely to feel their leisure travel will be dampened by the current state of things.** This week, 56.8% agreed that if they were to travel now for leisure, they would not be able to fully enjoy it, down from 60.5% at the end of July. And now just 43.1% have some agreement with the statement "I have lost my interest in/taste for traveling for the time being," down from 49.5%.

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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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

69.8%

68.6% Last week

Scale	Percentage
0 - Not at all concerned	5.8%
1	2.9%
2	4.6%
3	3.7%
4	1.8%
5 - Neutral – Neither Concerned nor unconcerned	11.3%
6	10.3%
7	14.2%
8	15.9%
9	9.6%
10 - Extremely concerned	19.8%
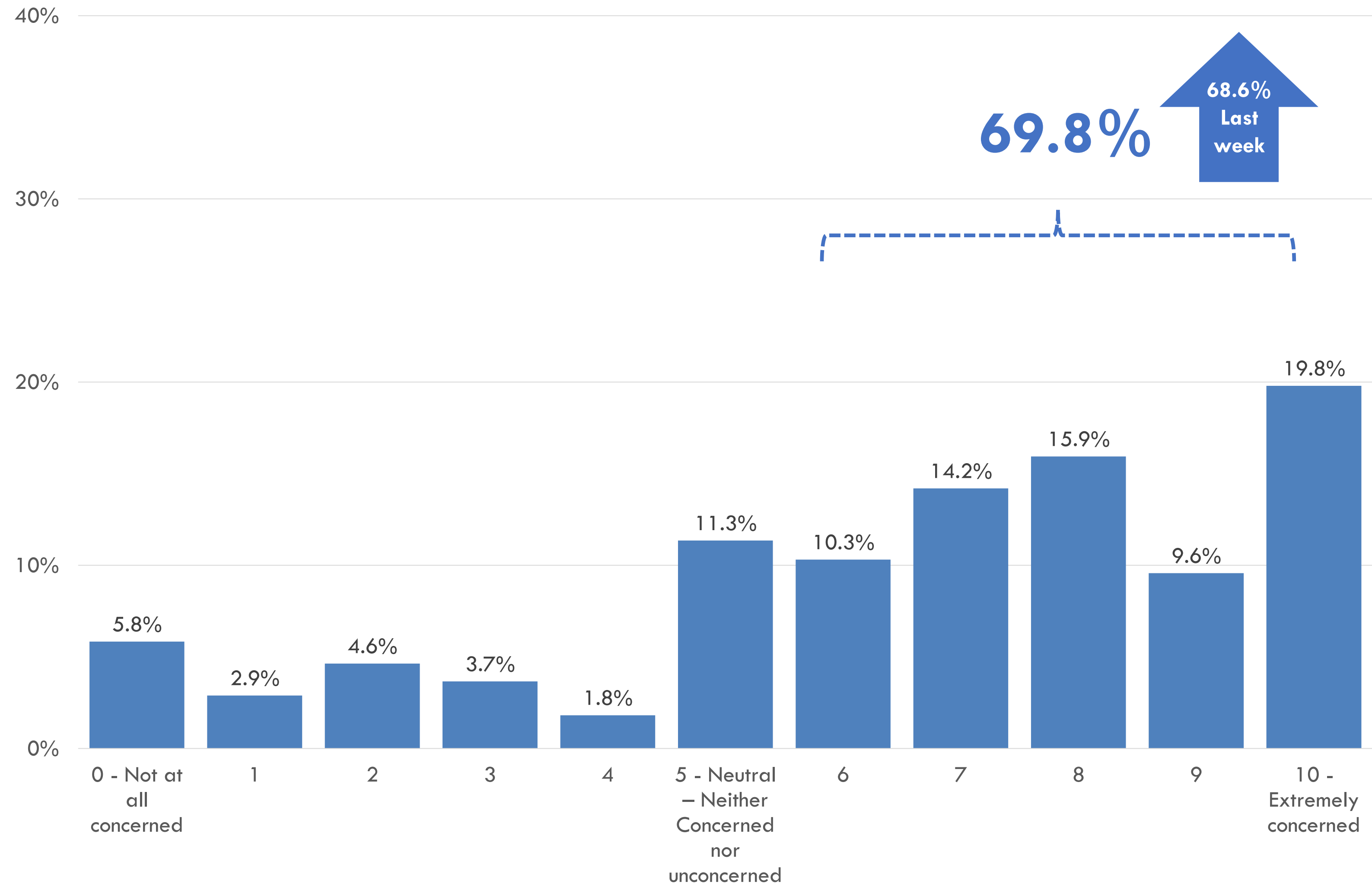
PERSONAL HEALTH CONCERNS (WAVES 1-28)

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)
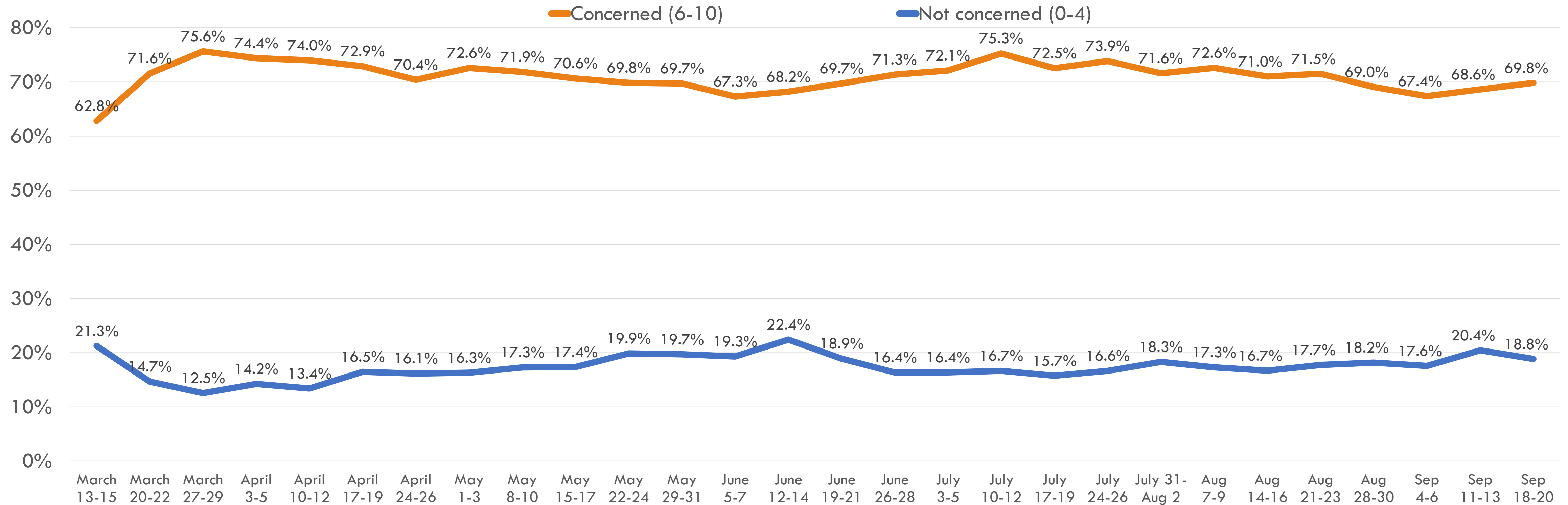
(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

73.8%

73.3%
Last week

Scale	%
0 - Not at all concerned	4.4%
1	3.0%
2	3.0%
3	3.8%
4	1.9%
5 - Neutral – Neither Concerned nor unconcerned	10.1%
6	8.9%
7	15.2%
8	15.6%
9	11.2%
10 - Extremely concerned	22.8%

HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-28)

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)

— Concerned (6-10)   — Unconcerned (0-4)

Concerned (6-10) values by date:
70.8%, 79.7%, 81.8%, 83.4%, 81.8%, 79.3%, 78.8%, 77.3%, 75.0%, 77.2%, 74.4%, 74.7%, 71.4%, 73.1%, 74.9%, 77.2%, 74.9%, 79.9%, 77.5%, 78.6%, 76.5%, 77.1%, 75.1%, 75.8%, 72.3%, 73.0%, 73.3%, 73.8%

Unconcerned (0-4) values by date:
17.1%, 8.7%, 8.7%, 8.1%, 9.7%, 11.7%, 10.9%, 13.6%, 14.5%, 14.4%, 14.8%, 15.8%, 17.1%, 17.5%, 14.9%, 13.7%, 14.1%, 12.6%, 12.6%, 13.3%, 14.5%, 13.1%, 14.8%, 14.7%, 16.3%, 14.1%, 16.3%, 16.0%

Dates: March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

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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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

56.7%

55.4% Last week

Scale	Percentage
0 - Not at all concerned	8.6%
1	3.5%
2	3.9%
3	4.6%
4	4.1%
5 - Neutral – Neither Concerned nor unconcerned	18.6%
6	10.3%
7	11.9%
8	12.5%
9	6.0%
10 - Extremely concerned	16.0%

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CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-28)

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)

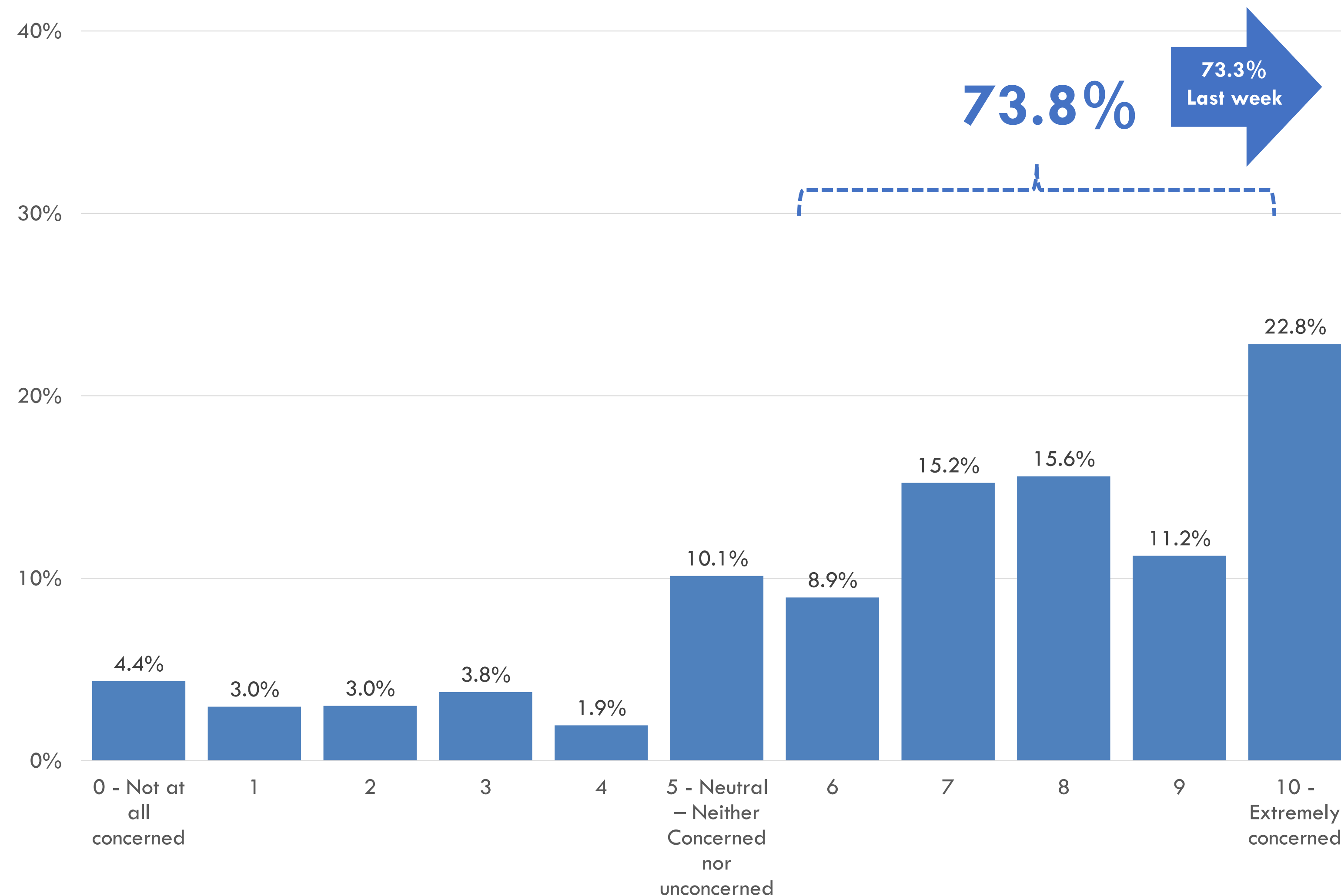— Concerned (6-10)   — Unconcerned (0-4)
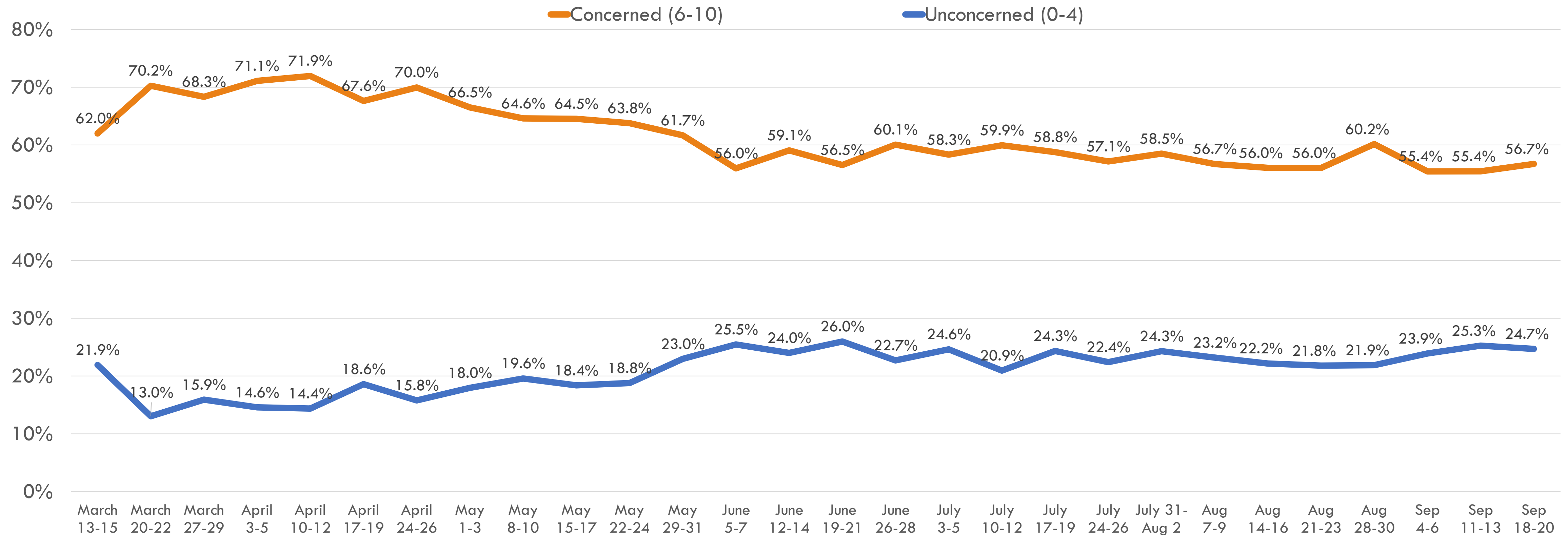
(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

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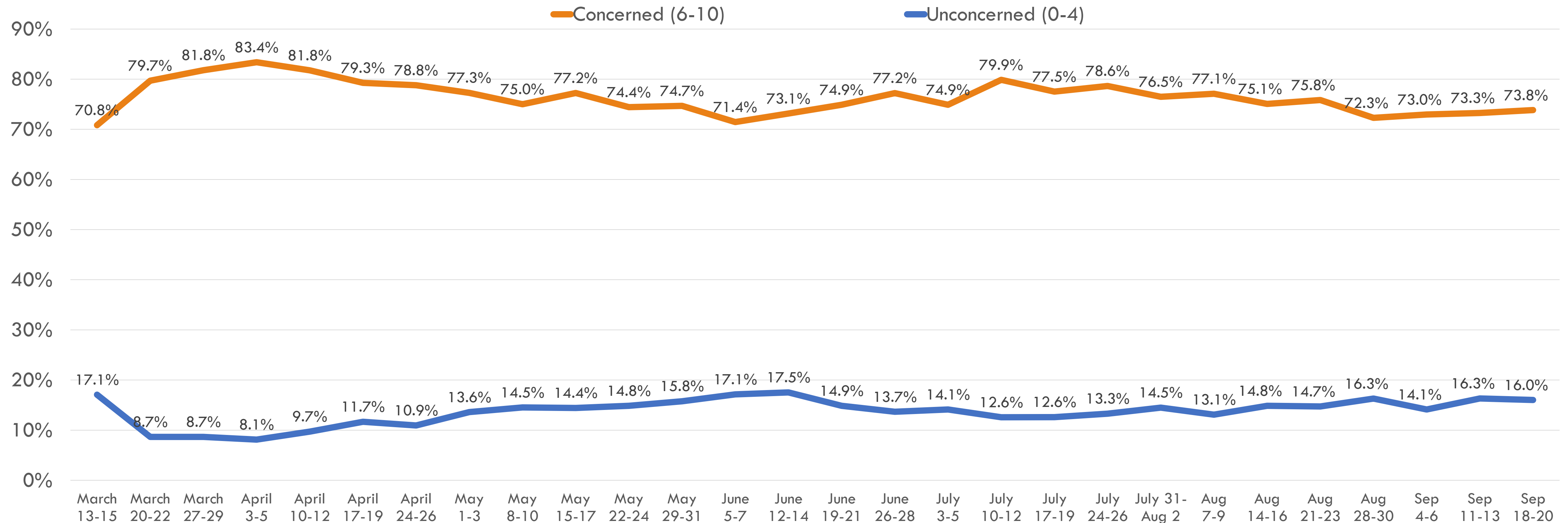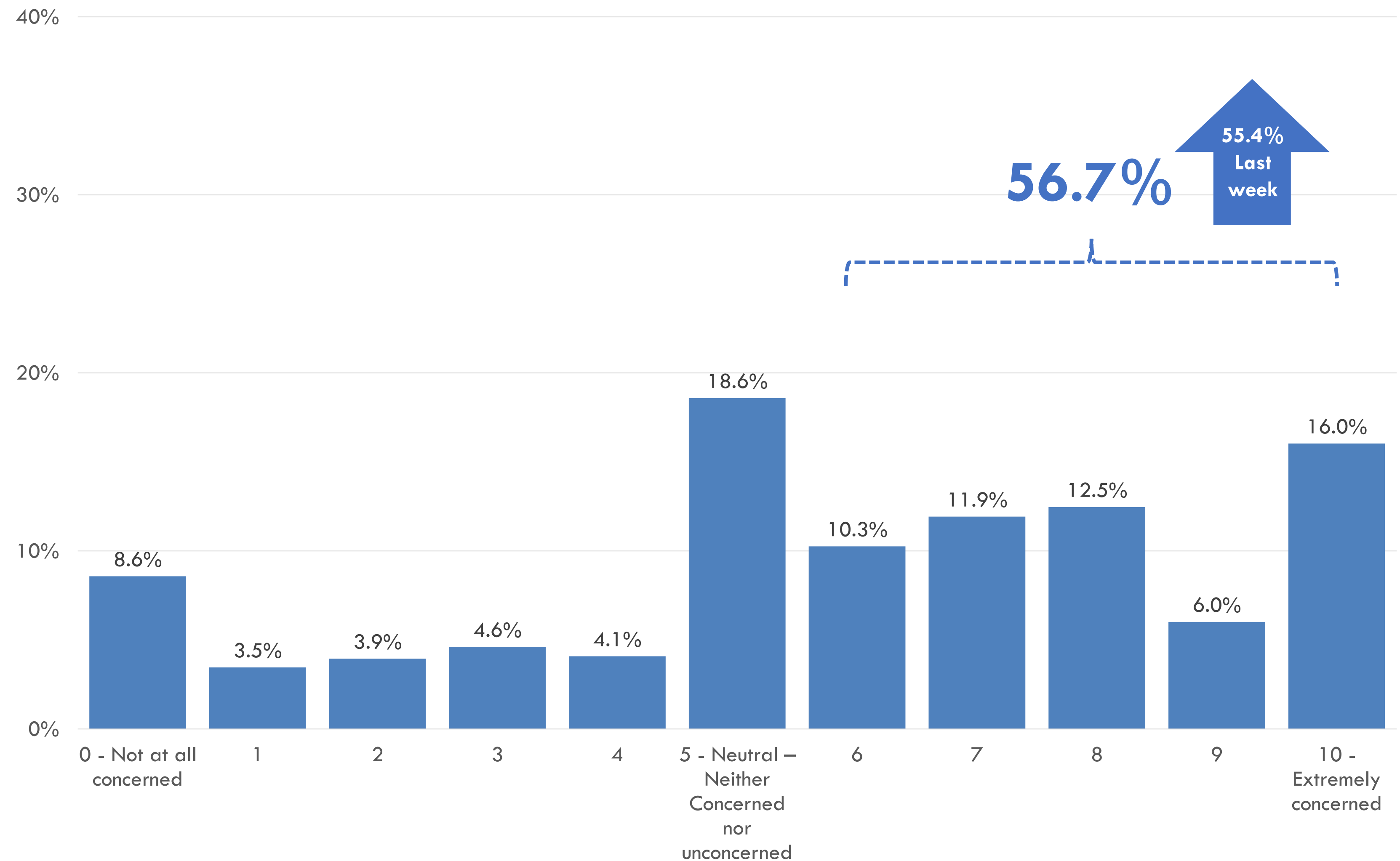
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

83.8% → 83.5% Last week

Response	Percentage
0 - Not at all concerned	1.5%
1	0.3%
2	0.6%
3	2.1%
4	1.6%
5 - Neutral – Neither Concerned nor unconcerned	10.2%
6	9.4%
7	16.9%
8	19.9%
9	12.9%
10 - Extremely concerned	24.6%

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CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-28)

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

Legend: Concerned (6-10) — Unconcerned (0-4)

Concerned (6-10) values: 80.8%, 87.5%, 85.5%, 88.4%, 87.5%, 88.3%, 87.4%, 87.2%, 84.3%, 85.6%, 83.4%, 84.9%, 82.0%, 84.2%, 83.9%, 85.4%, 84.4%, 85.8%, 85.7%, 85.1%, 85.0%, 85.2%, 81.9%, 84.2%, 80.4%, 81.1%, 83.5%, 83.8%

Unconcerned (0-4) values: 7.9%, 4.4%, 6.0%, 3.5%, 6.1%, 5.4%, 5.3%, 5.0%, 7.3%, 6.8%, 5.7%, 6.9%, 8.8%, 7.1%, 6.8%, 6.5%, 6.4%, 5.5%, 5.6%, 6.4%, 6.4%, 5.9%, 6.7%, 7.5%, 9.3%, 5.8%, 7.4%, 6.1%

X-axis labels: March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)

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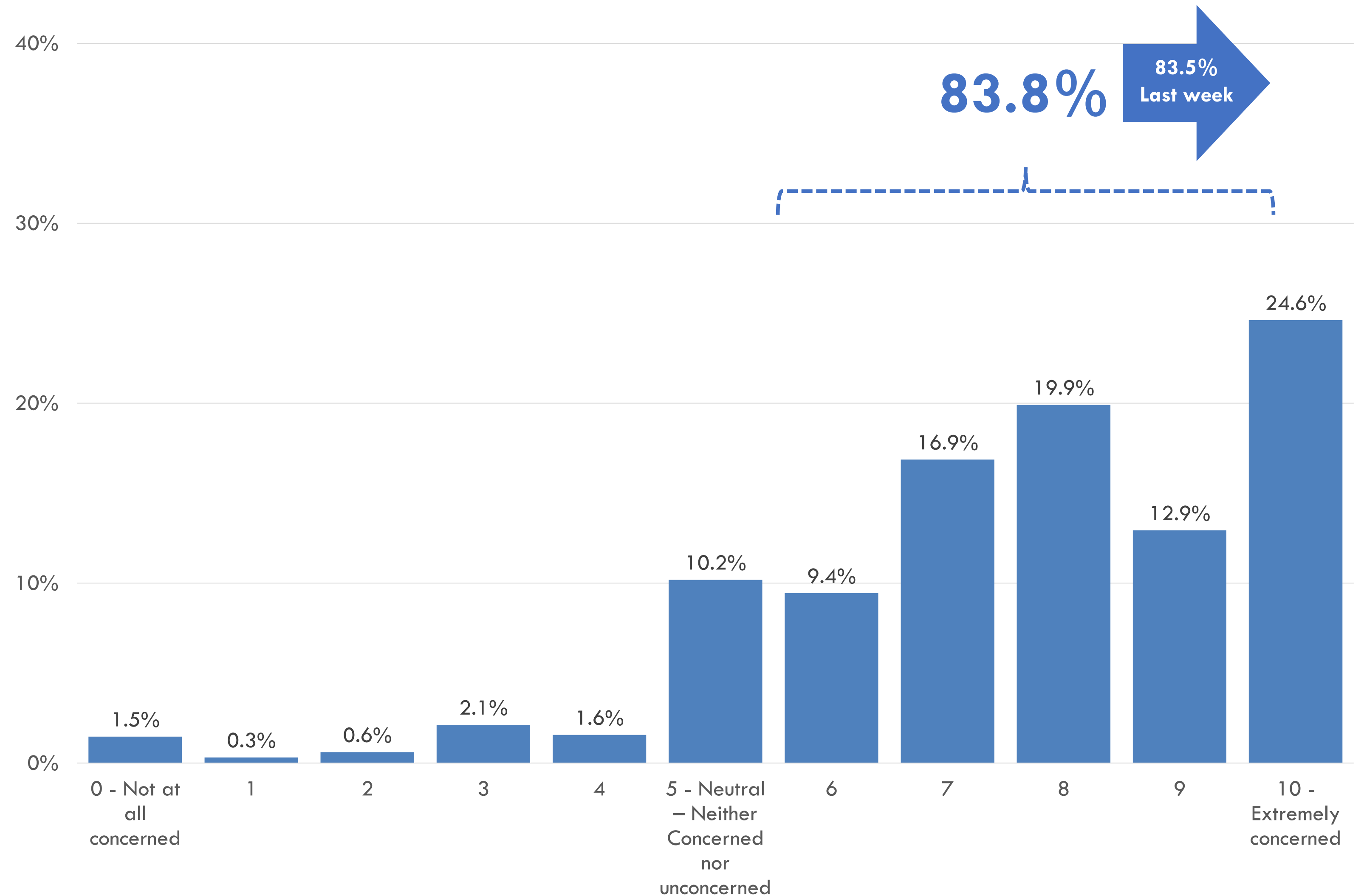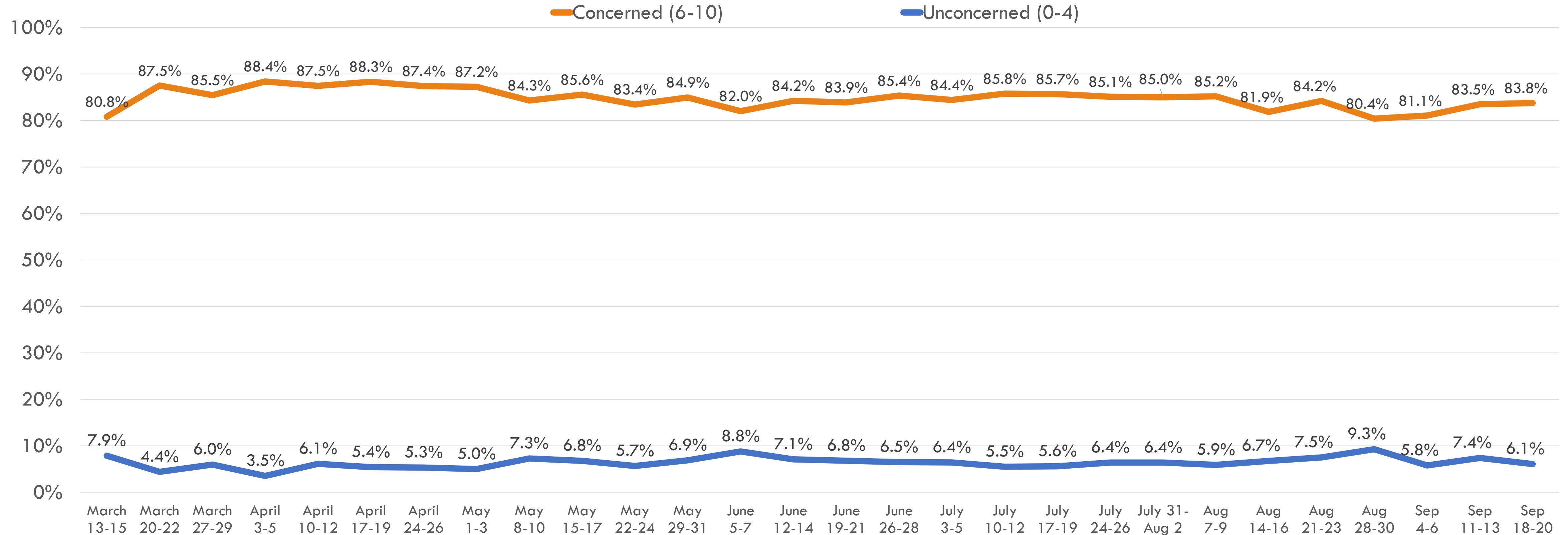
PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 28)

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

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

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

Activity	Percent
Traveling on a cruise line	75.6%
Traveling by bus or motor coach on a group tour	68.7%
Intercity bus travel	68.2%
Attending a conference or convention	67.9%
Attending a performance	66.7%
Sporting events - Large venue	66.1%
Go to a casino	65.3%
Traveling outside the United States	64.7%
Train travel (intercity travel - e.g., AMTRAK)	61.4%
Sporting events - Small venue	61.2%
Traveling in a taxi/Uber/Lyft	55.8%
Traveling on a commercial airline	55.7%
Traveling for business reasons	52.9%
Visiting a museum or other indoor attraction	50.6%
Staying in an Airbnb or home rental	48.4%
Visiting an amusement park or other outdoor attractions	46.2%
Dining in a restaurant	45.2%
Staying in a hotel	37.6%
Visiting friends and relatives	28.0%
Going shopping	26.8%
Non-team outdoor recreation	19.9%
Taking a road trip	18.2%

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PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-28 COMPARISON)

Question: At this moment, how safe would you feel doing each type of travel activity?
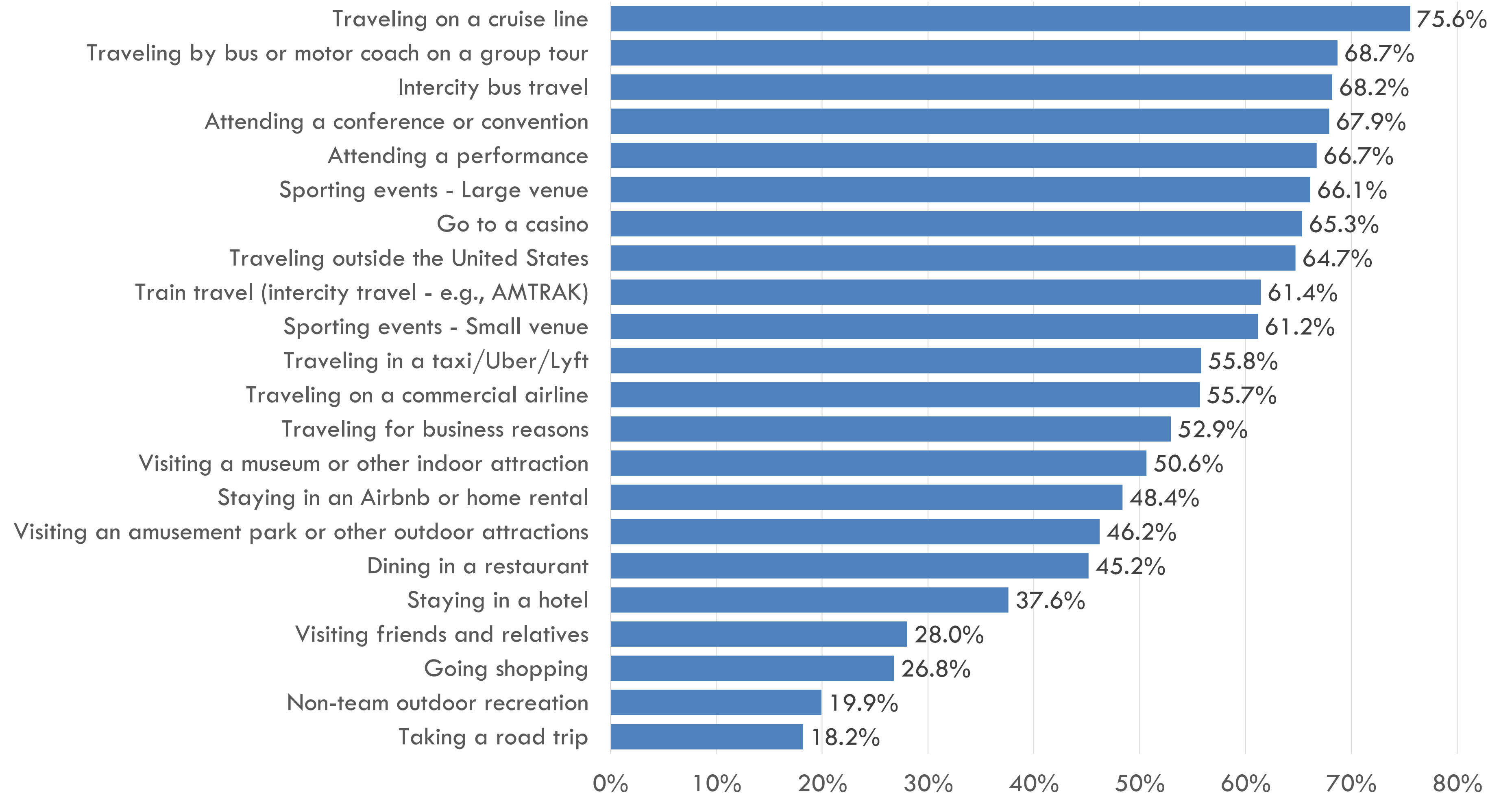
(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)
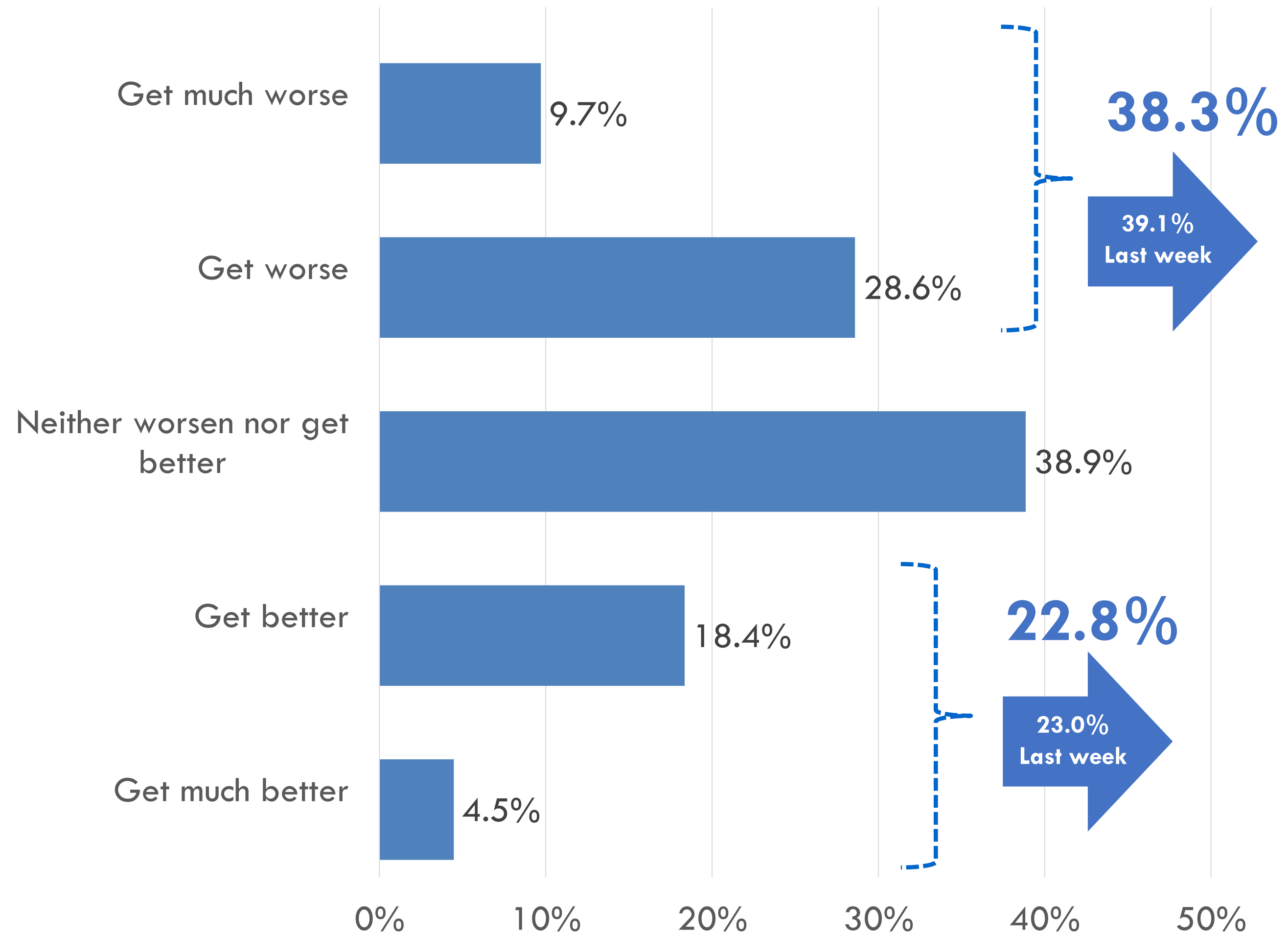

% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITES TESTED)

Increasing Safety Concerns

Decreasing Safety Concerns

Relapse to Increasing Safety Concerns

Decreasing Safety Concerns

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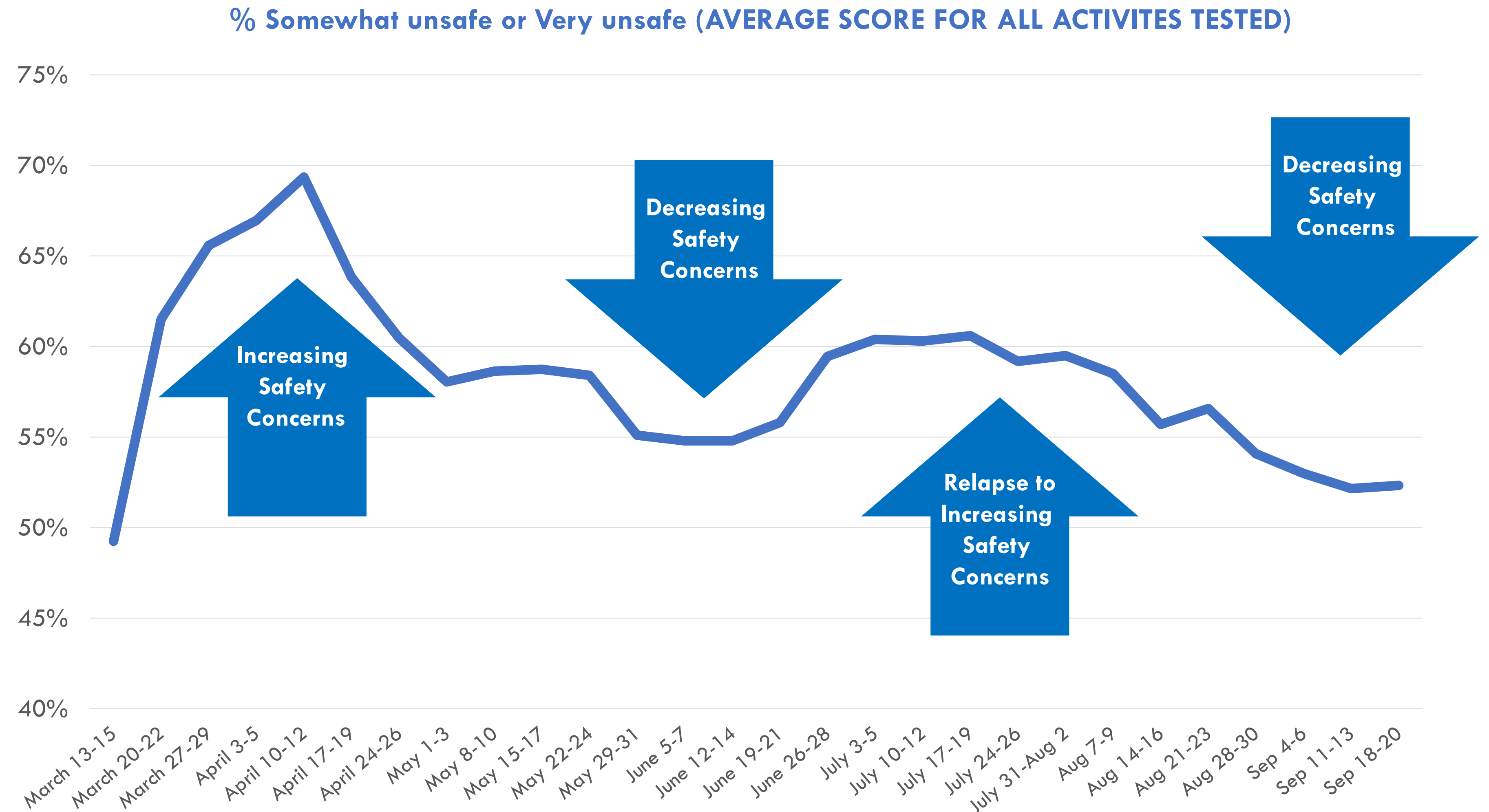
EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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

In the next month the coronavirus situation will _____

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Get much worse — 9.7%

Get worse — 28.6%

Neither worsen nor get better — 38.9%

Get better — 18.4%

Get much better — 4.5%

38.3%

39.1%
Last week

22.8%

23.0%
Last week

0%   10%   20%   30%   40%   50%

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

In the next month the coronavirus situation will _____

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)
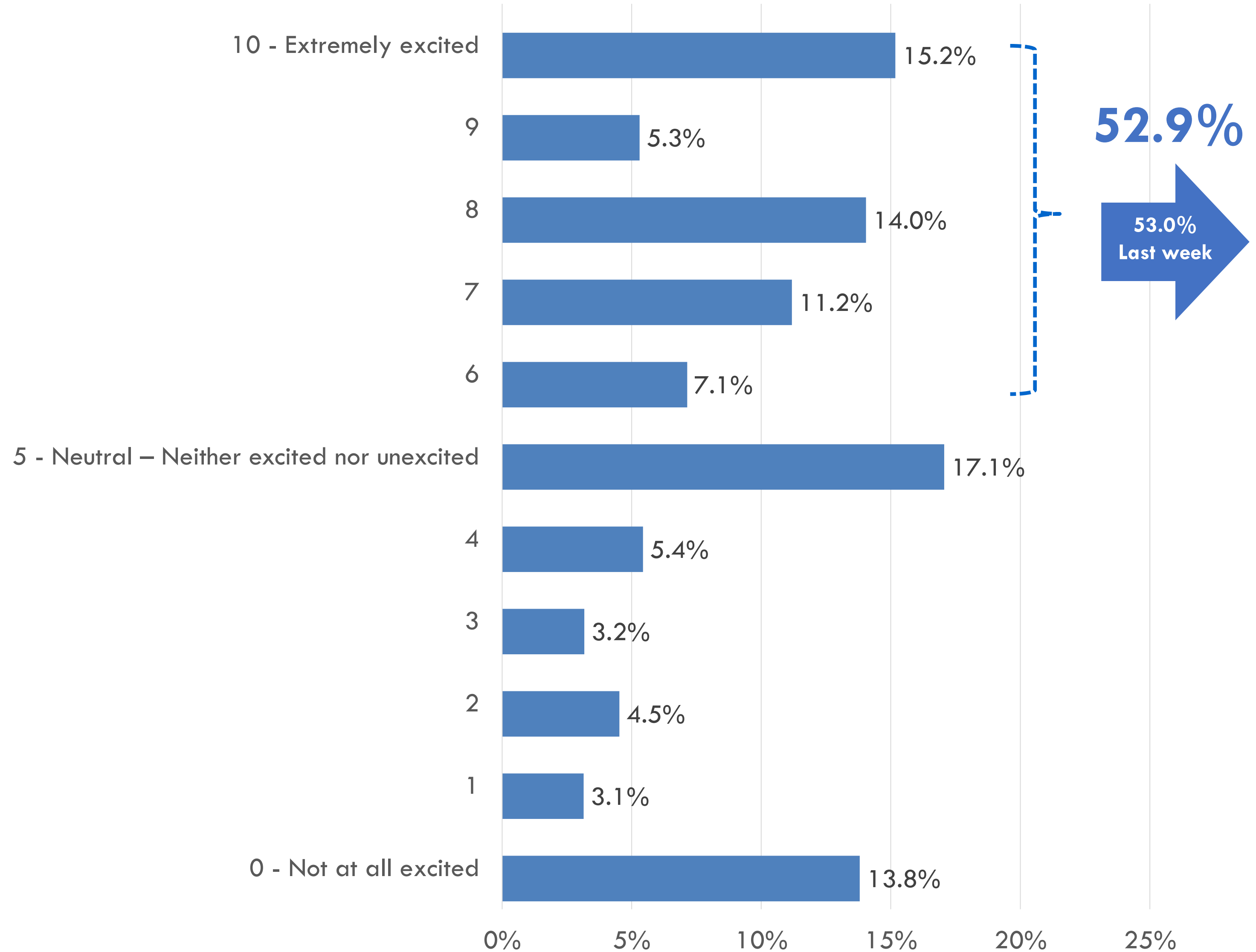

"Worse" or "Much worse"

"Better" or "Much better"
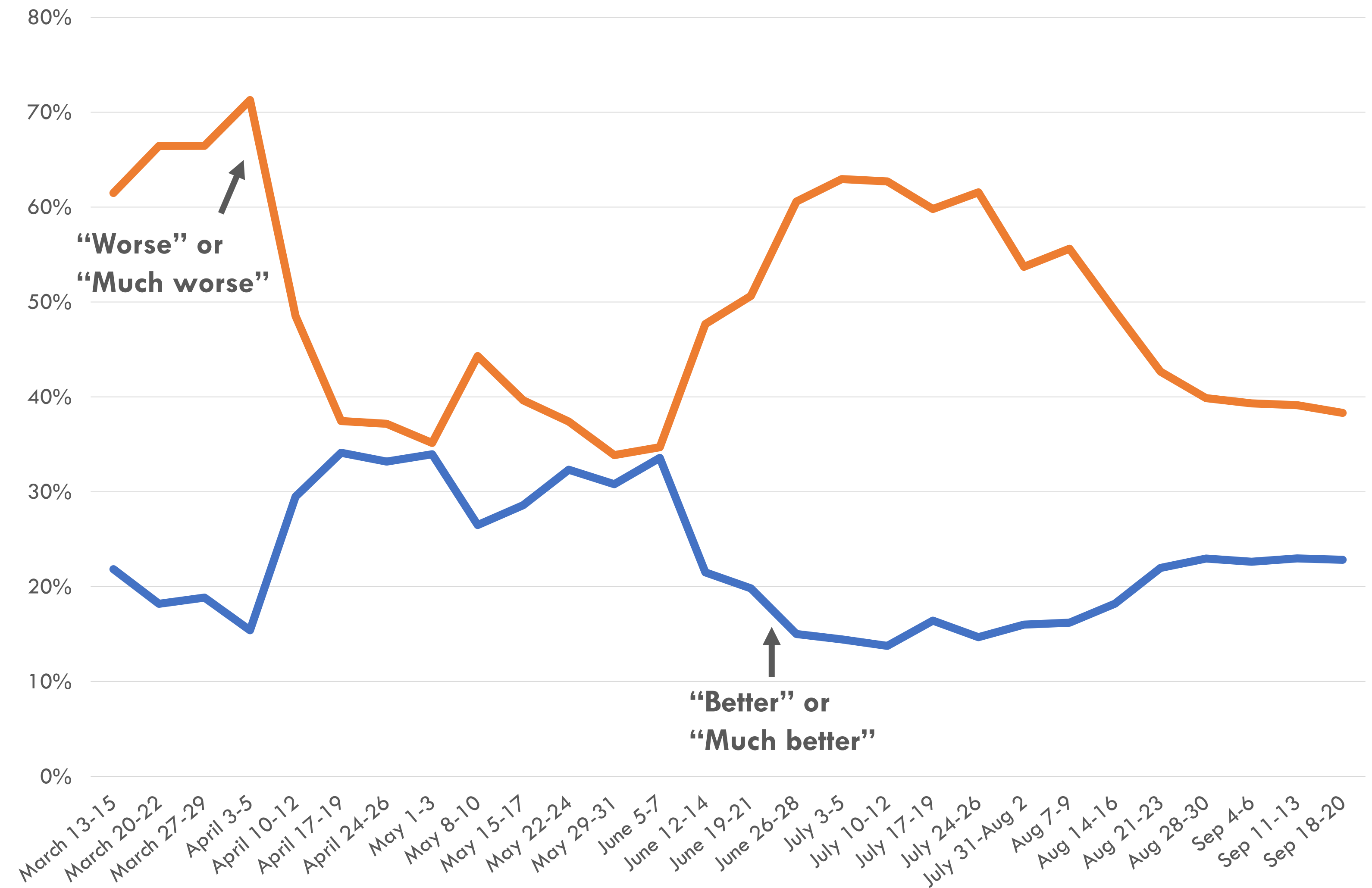
EXCITEMENT TO TRAVEL NOW

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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Response	Percentage
10 - Extremely excited	15.2%
9	5.3%
8	14.0%
7	11.2%
6	7.1%
5 - Neutral – Neither excited nor unexcited	17.1%
4	5.4%
3	3.2%
2	4.5%
1	3.1%
0 - Not at all excited	13.8%

52.9%

53.0% Last week

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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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Rating	Percentage
10 - Extremely excited	13.5%
9	4.8%
8	11.8%
7	11.8%
6	9.9%
5 - Neutral – Neither excited nor unexcited	21.8%
4	4.0%
3	3.4%
2	3.6%
1	1.9%
0 - Not at all excited	13.5%

51.8%

49.4% last week

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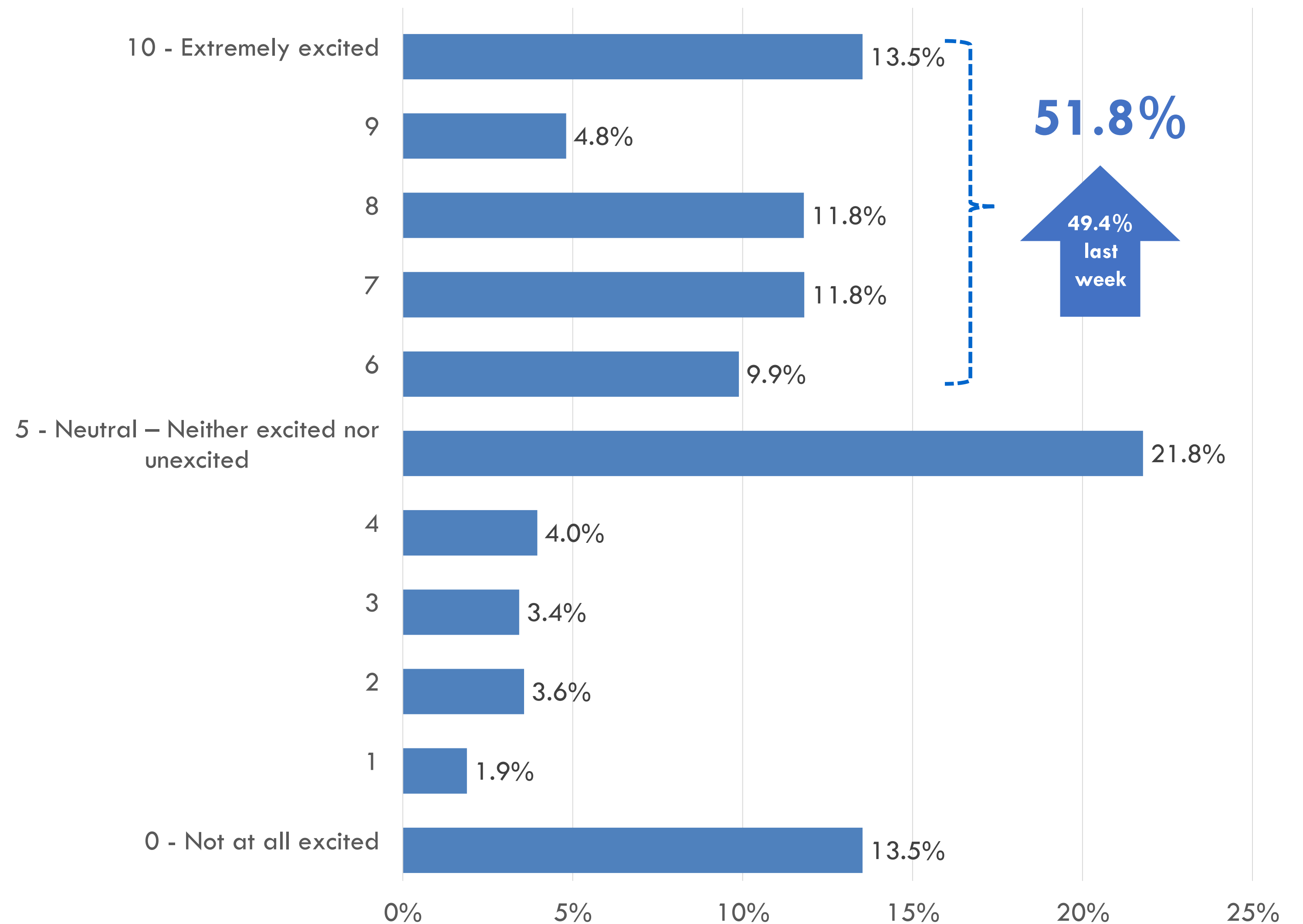
MOST TALKED ABOUT CORONAVIRUS HOTSPOTS

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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Destination	Percentage
New York	60.9%
Florida	57.1%
California	41.0%
Texas	23.3%
Los Angeles	9.0%
Arizona	7.7%
Las Vegas	7.2%
Miami	6.7%
New Jersey	5.0%
Georgia	4.3%
Washington	3.3%
Chicago	2.8%
New Orleans	2.6%
Seattle	2.6%
Orlando	2.3%
Hawaii	2.2%

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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)
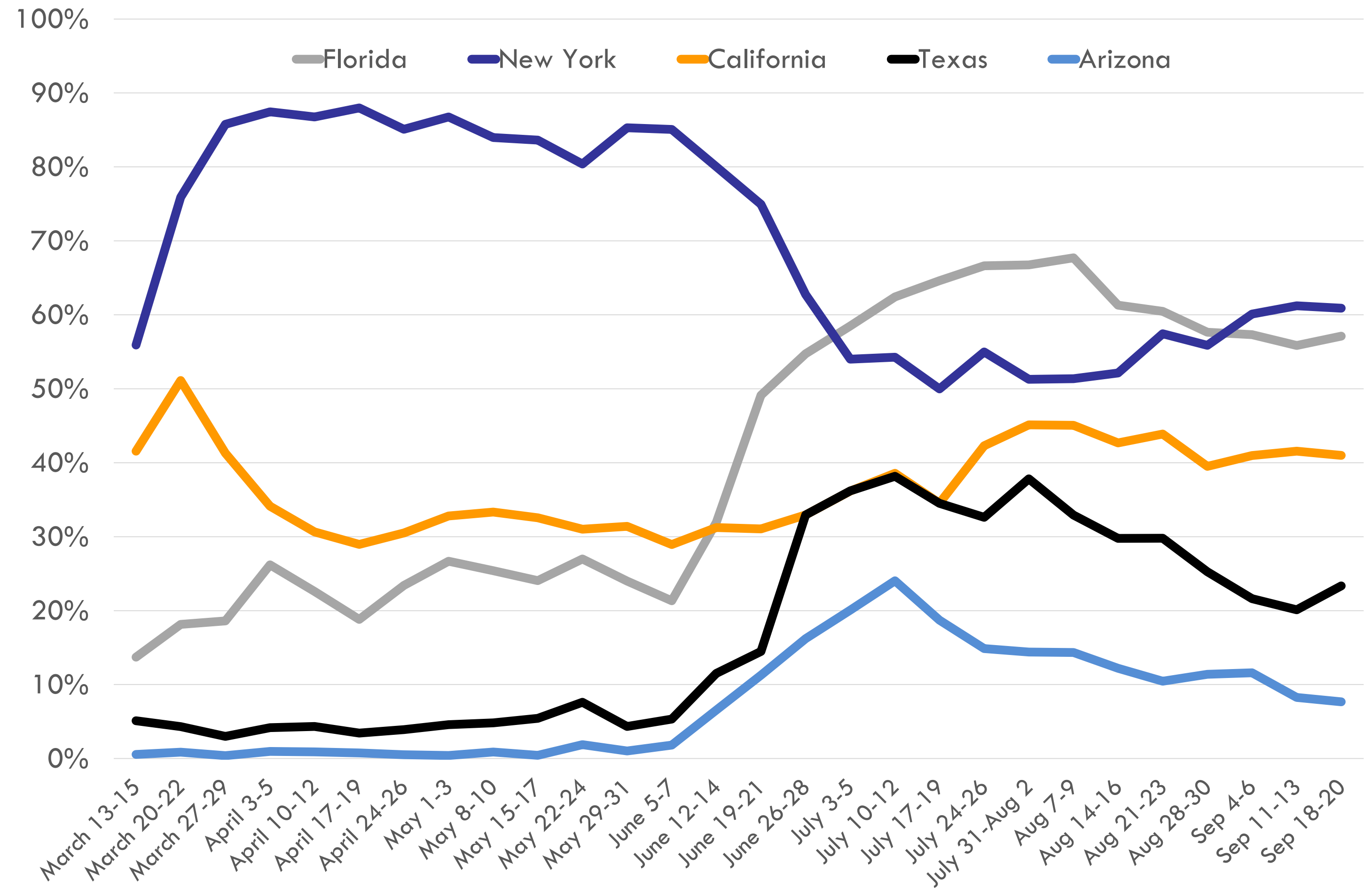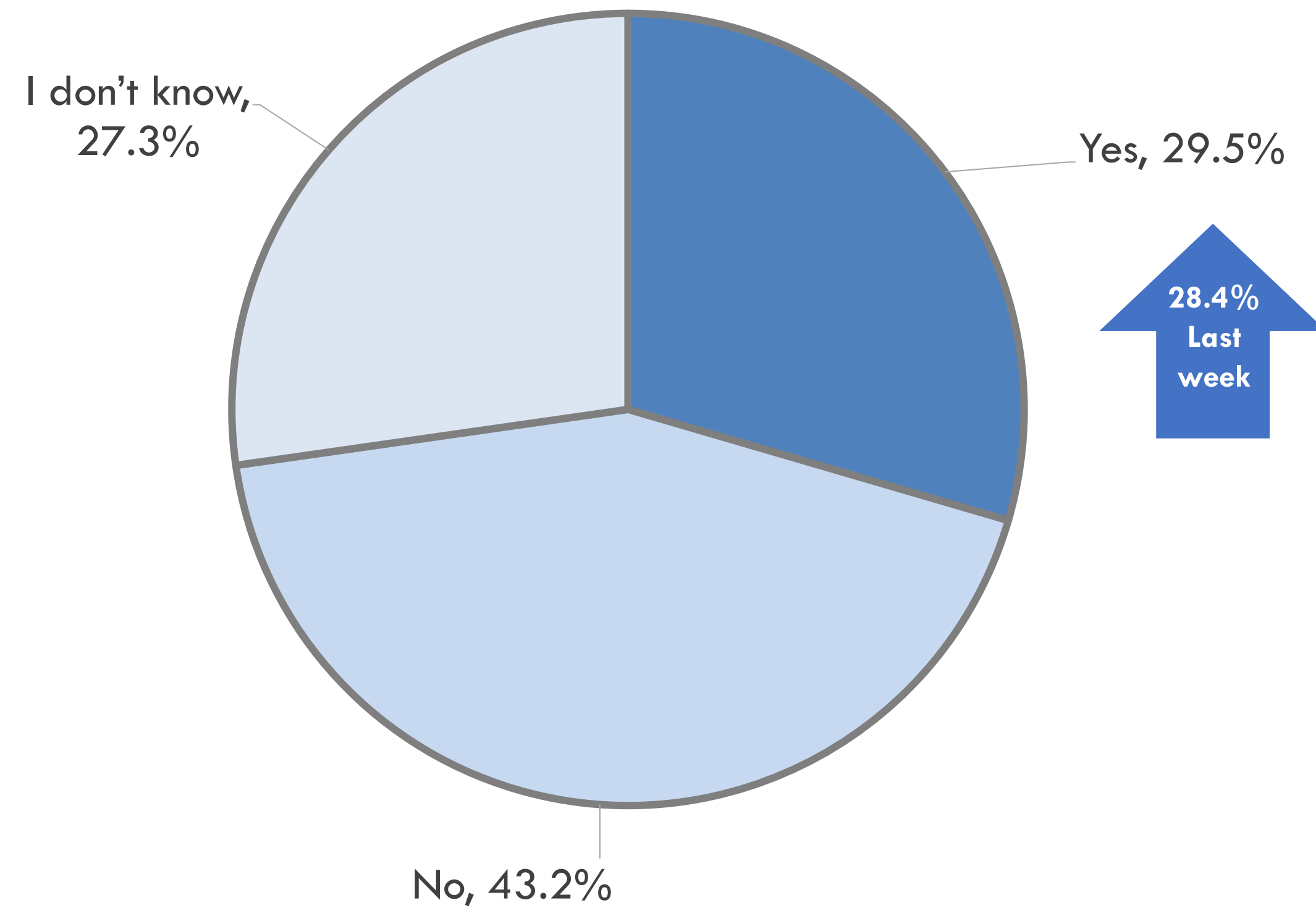
(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

I don't know, 27.3%

Yes, 29.5%

28.4% Last week

No, 43.2%

Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit?

(Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

(Base: Waves 3-7, 22 and 28 data. All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,201, and 1,200 completed surveys)

(% Saying Yes)

Date	% Saying Yes
March 27-29	29.0%
April 3-5	30.5%
April 10-12	39.3%
April 17-19	36.2%
April 24-26	30.7%
August 7-9	32.9%
Sep 18-20	19.1%

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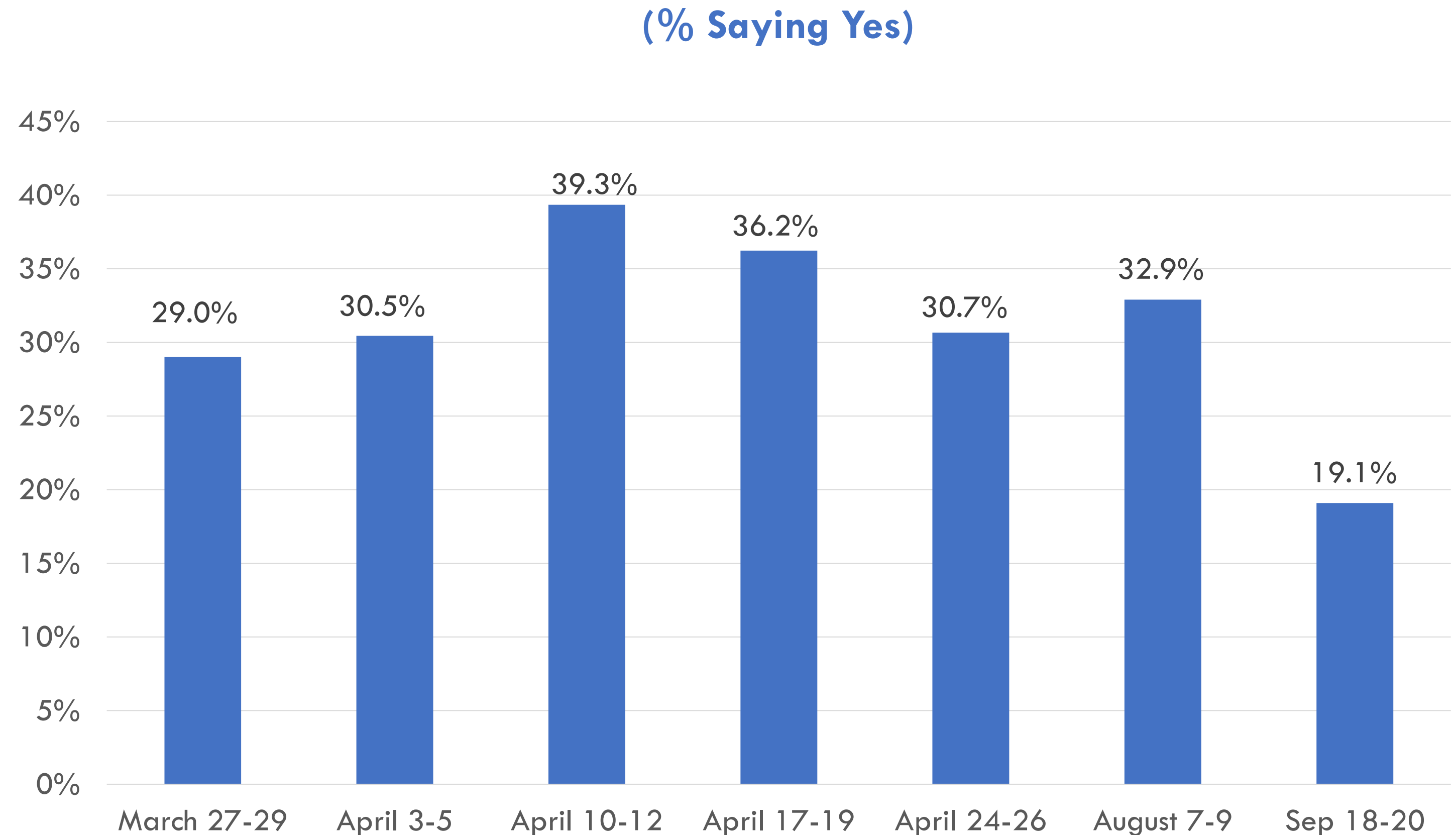
HOW THEY WILL CHANGE TRAVEL DESTINATIONS AFTER THE PANDEMIC

Question: **In a few words, please explain how you will change the destinations you visit.**
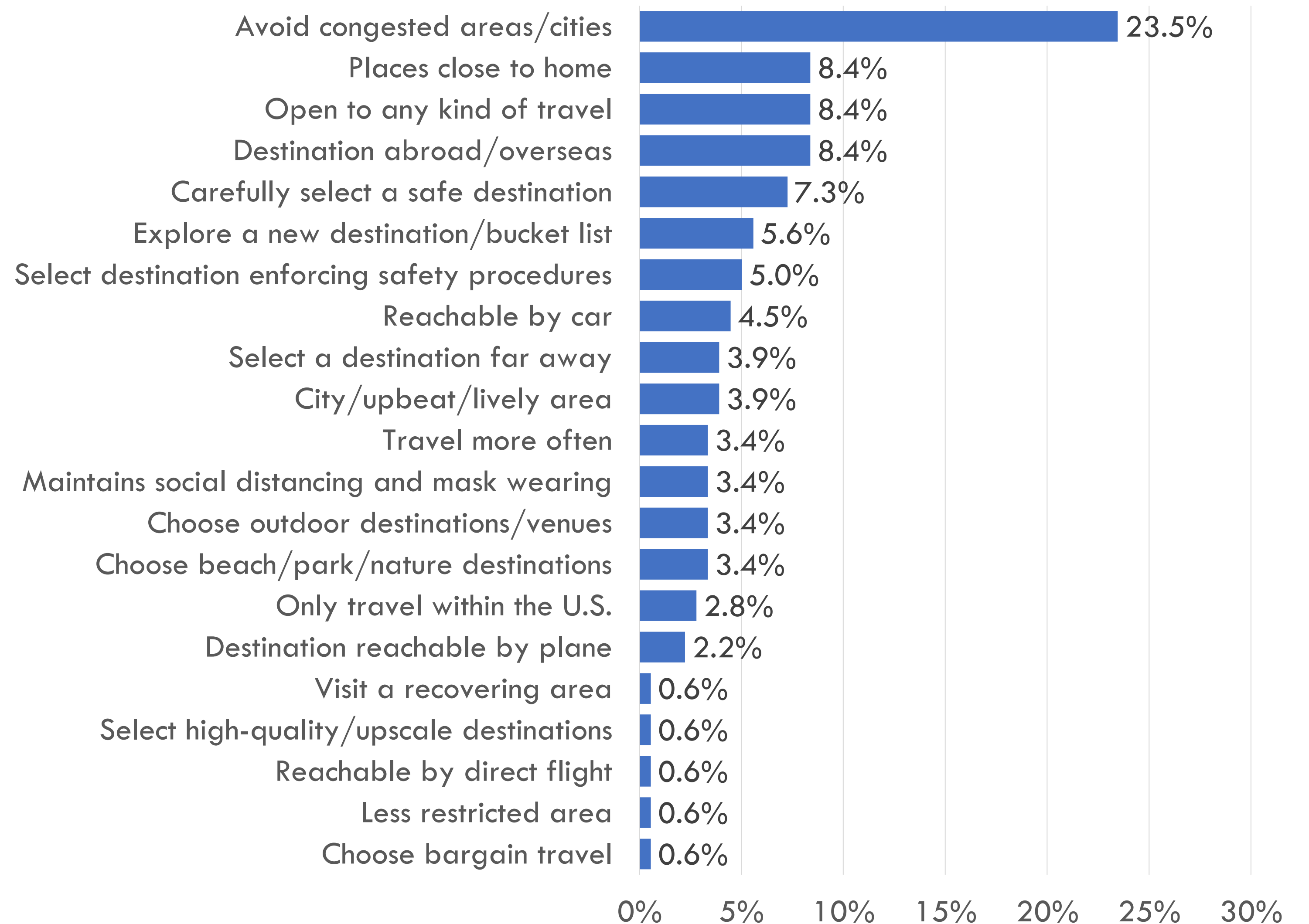
(Base: Wave 28 data. Respondents who expect to change travel destinations after the pandemic. 222 completed surveys. Data collected Sep 18-20, 2020)

Category	Percentage
Avoid congested areas/cities	23.5%
Places close to home	8.4%
Open to any kind of travel	8.4%
Destination abroad/overseas	8.4%
Carefully select a safe destination	7.3%
Explore a new destination/bucket list	5.6%
Select destination enforcing safety procedures	5.0%
Reachable by car	4.5%
Select a destination far away	3.9%
City/upbeat/lively area	3.9%
Travel more often	3.4%
Maintains social distancing and mask wearing	3.4%
Choose outdoor destinations/venues	3.4%
Choose beach/park/nature destinations	3.4%
Only travel within the U.S.	2.8%
Destination reachable by plane	2.2%
Visit a recovering area	0.6%
Select high-quality/upscale destinations	0.6%
Reachable by direct flight	0.6%
Less restricted area	0.6%
Choose bargain travel	0.6%

Destination Analysts
DO YOUR RESEARCH

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.)
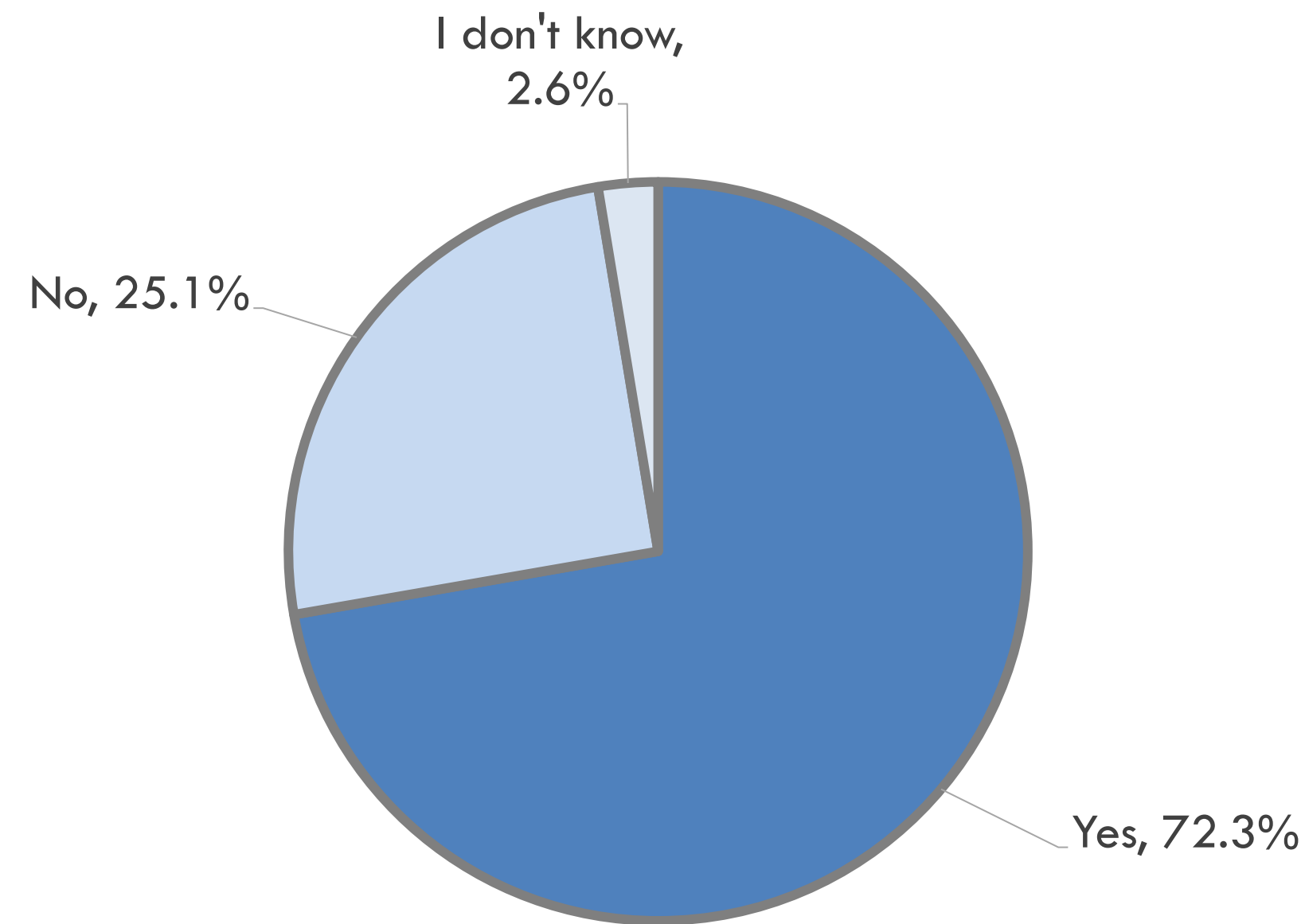
Historical data
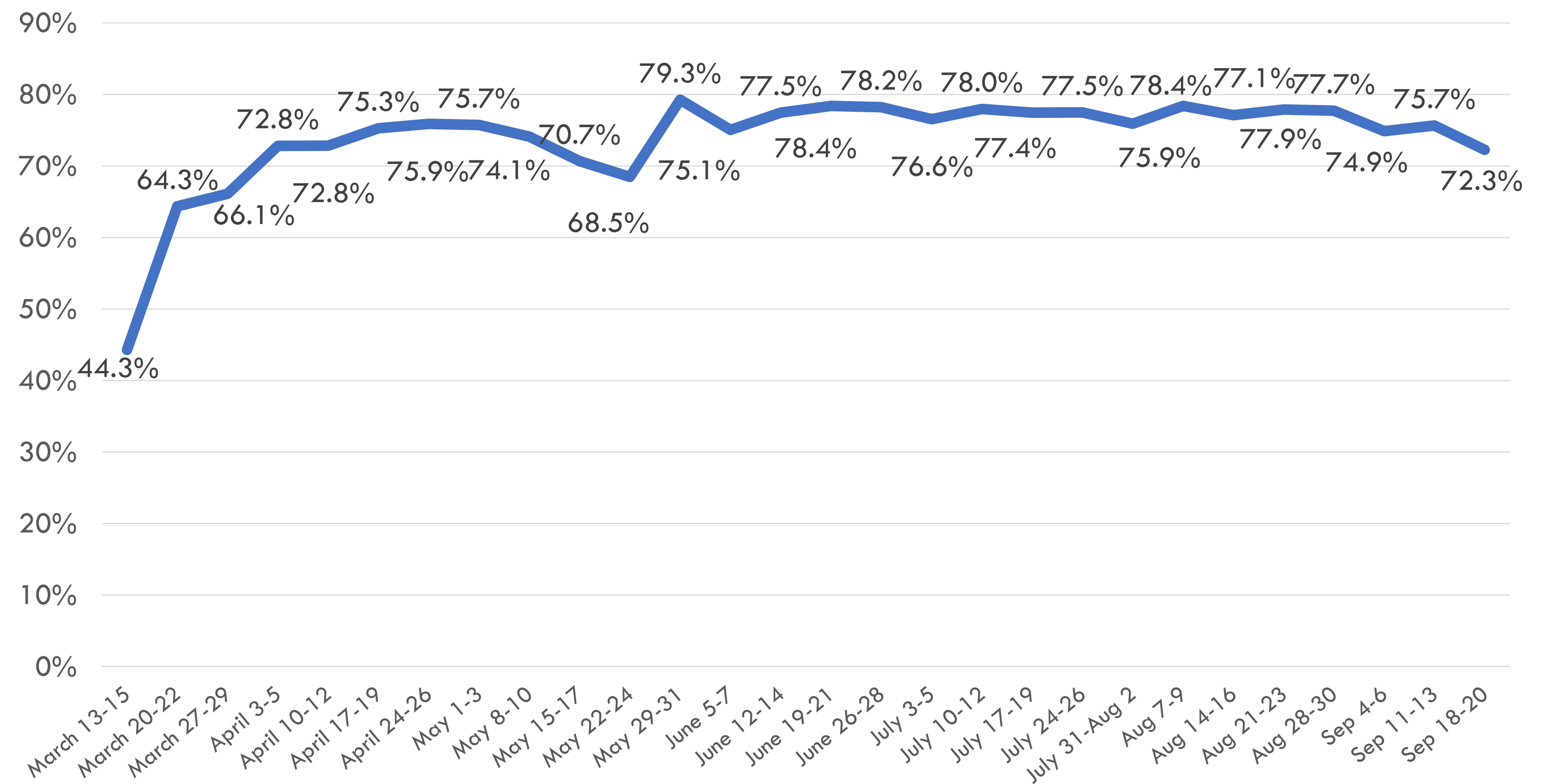
I don't know, 2.6%

No, 25.1%

Yes, 72.3%

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)

Destination Analysts
DO YOUR RESEARCH

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 28. Respondents whose travel was
impacted by the coronavirus, 897 completed surveys.
Data collected Sep 18-20, 2020)

Canceled a trip(s) — 69.5%
Postponed a trip(s) — 50.9%
Changed destinations I would visit — 15.3%
Changed the mode of transportation used — 11.7%
Changed my activities on a trip(s) — 10.0%
Shortened the length of a trip(s) — 4.5%
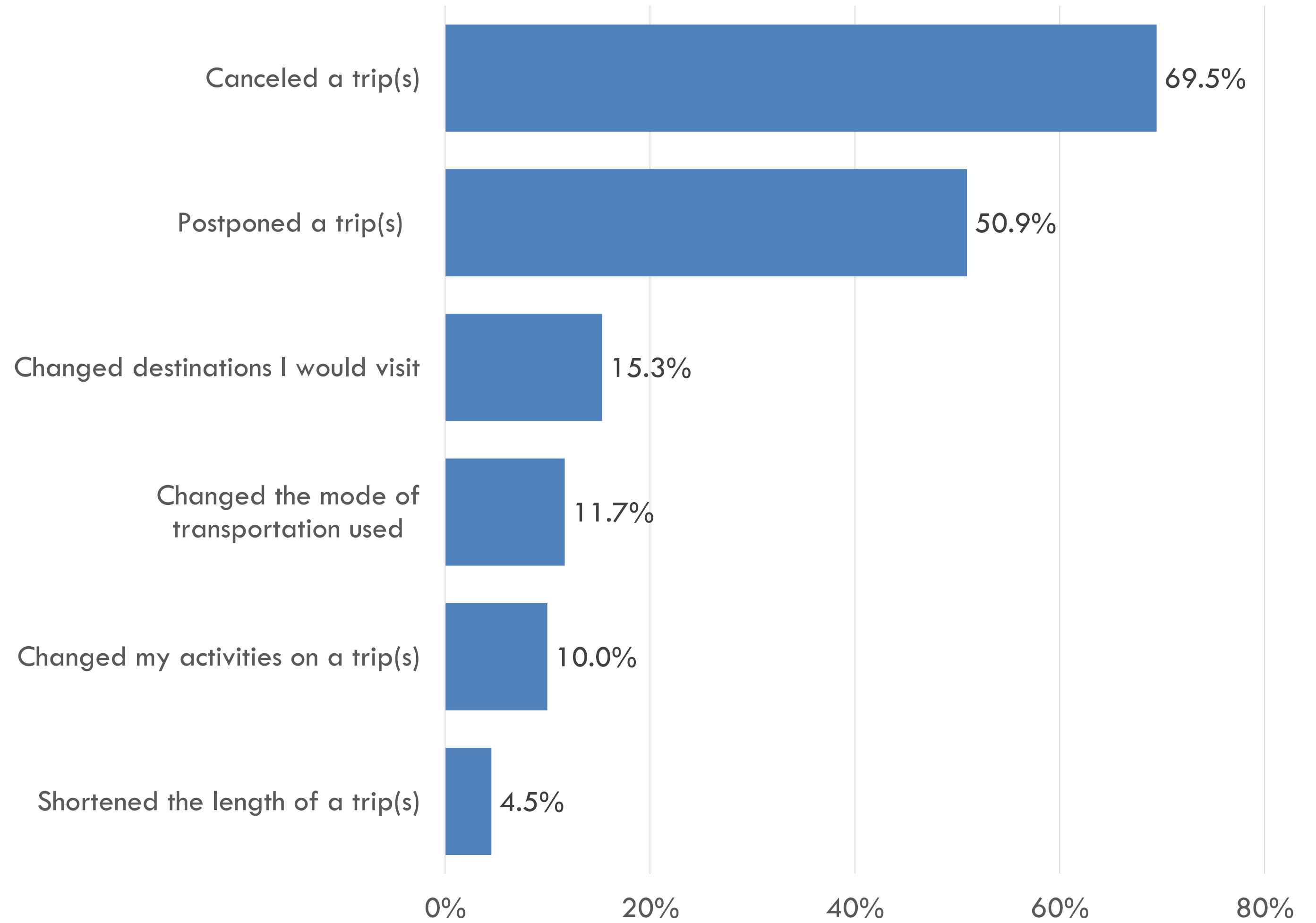
WHY THE CORONAVIRUS IS IMPACTING TRAVEL

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

(Base: Wave 28. Respondents whose travel was impacted by the coronavirus, 893 completed surveys. Data collected Sep 18-20, 2020)

Concerns about my safety — 66.3%

Concerns about contracting the virus and passing it on to others — 54.5%

Concerns about my loved ones' safety — 48.0%

Potential to get stuck somewhere (unable to get home on schedule) — 36.9%

Cancellations outside my control (airline flights, cruise trips, tours, etc.) — 36.9%

Potential to have my travel experiences limited/ruined by the situation — 33.4%

Government travel restrictions — 30.3%

Cancellations outside my control (events, meetings, conferences, festivals, etc.) — 23.7%

Concerns about coronavirus situation impacting my personal finances — 20.3%

Business restrictions/employer-mandated restrictions — 7.8%

Destination Analysts
DO YOUR RESEARCH

TRIPS CANCELLED/POSTPONED

Question: How many trips did you cancel?

6 or more � 4.7%
5 — 1.5%
4 — 4.7%
3 — 11.5%
2 — 34.2%
1 — 43.5%

Wave 28 (Sep 18-20)

Avg. # trips cancelled = 2.1
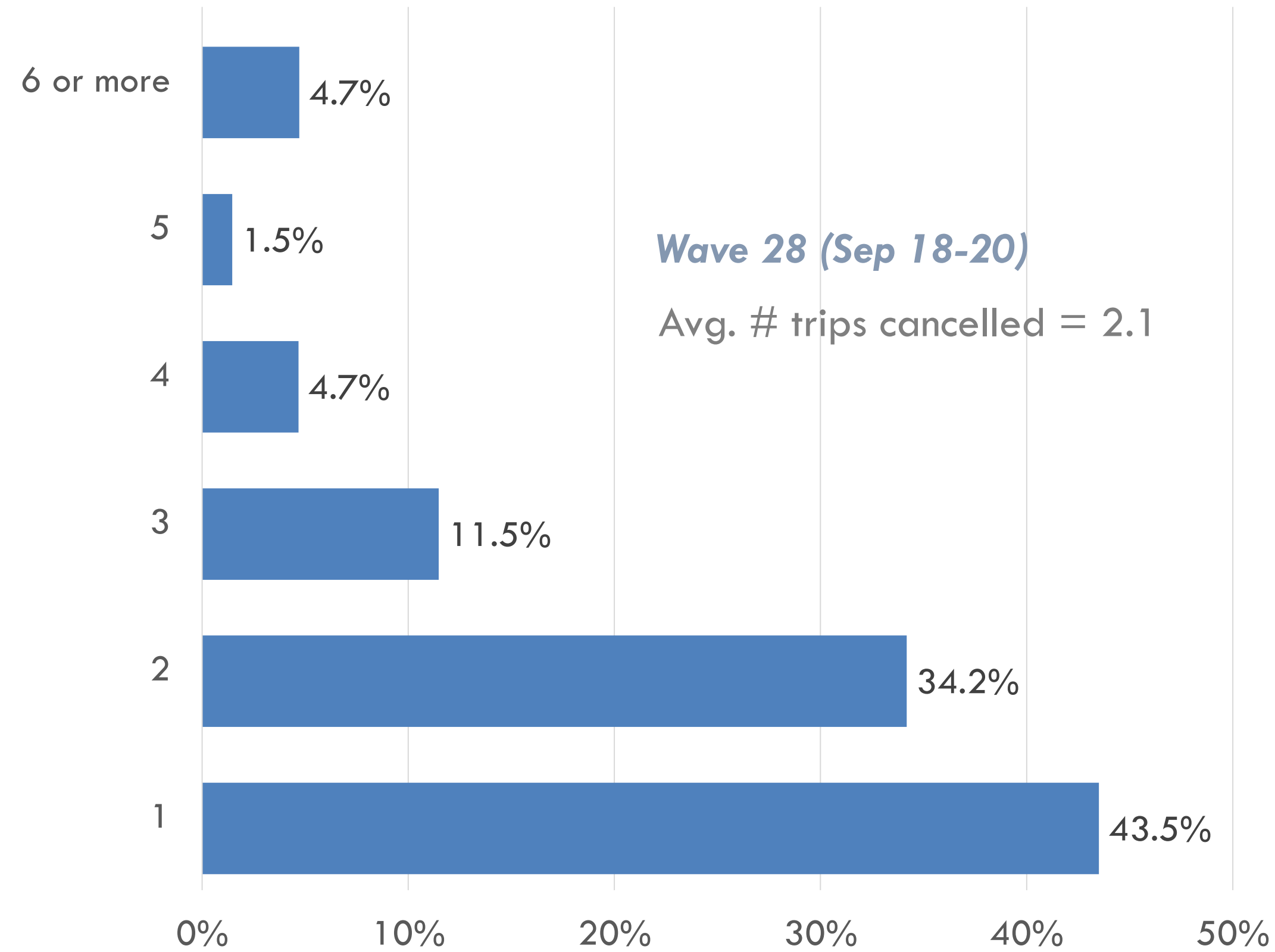
Question: How many trips did you postpone?

6 or more — 2.8%
5 — 0.8%
4 — 3.6%
3 — 6.7%
2 — 30.8%
1 — 55.3%

Wave 28 (Sep 18-20)

Avg. # trips postponed = 1.8
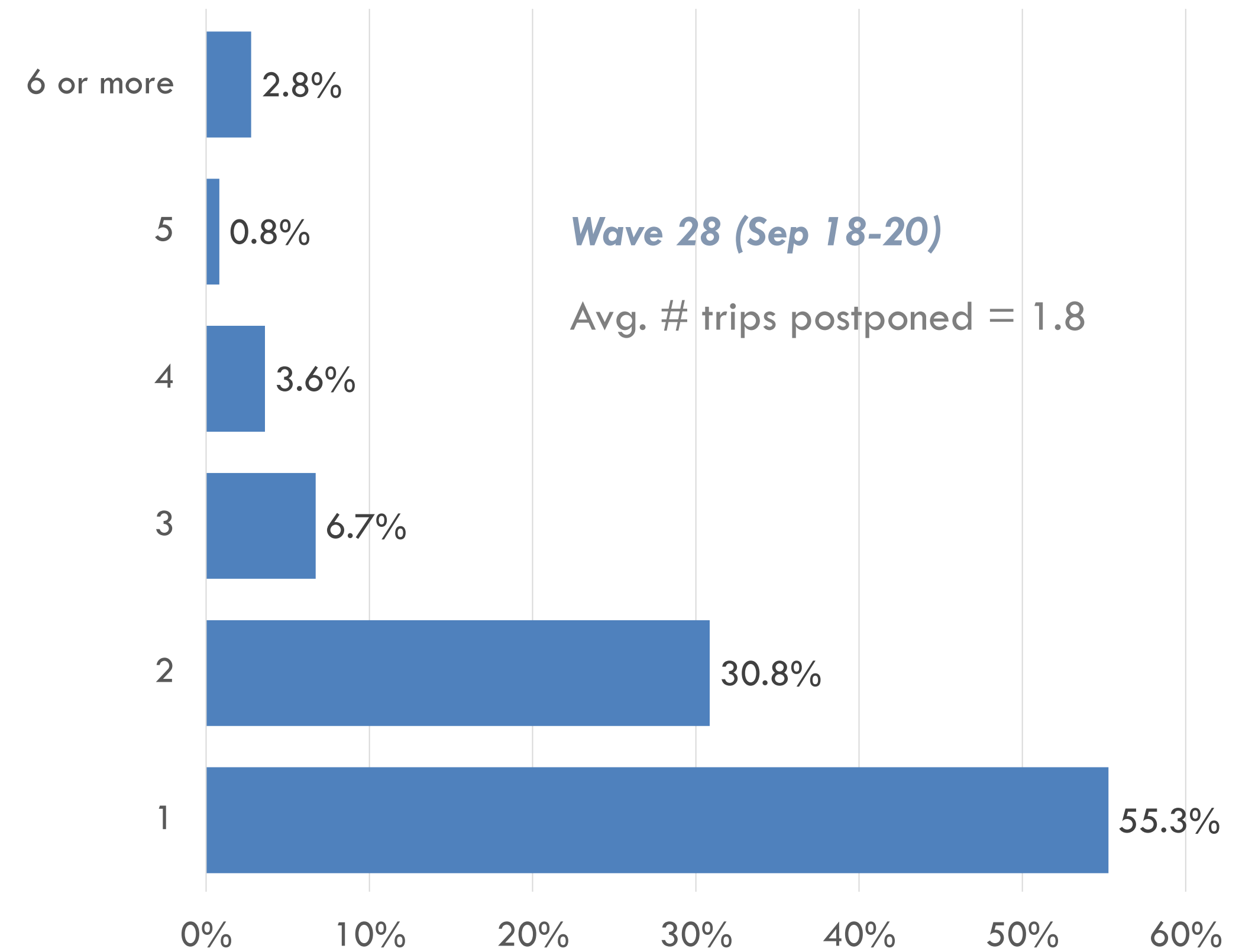
(Base: Wave 28 data. Respondents cancelling/postponing a trip, 619/476 completed surveys. Data collected Sep 18-20, 2020)

Destination Analysts
DO YOUR RESEARCH

MONTH OF TRIP CANCELLATION

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

(Base: Wave 28 data. Respondents cancelling a trip, 619 completed surveys. Data collected Sep 18-20, 2020)

Month	Percentage
January	1.0%
February	2.8%
March	19.3%
April	32.8%
May	29.1%
June	26.7%
July	26.6%
August	21.9%
September	15.0%
October	10.6%
November	6.9%
December	4.0%
Sometime in 2021	3.5%

Destination Analysts
DO YOUR RESEARCH

MONTH OF TRIP CANCELLATION

Legend:
- March 13-15
- March 20-22
- March 27-29
- April 3-5
- April 10-12
- April 17-19
- April 24-26
- May 1-3
- May 8-10
- May 15-17
- May 22-24
- May 29-31
- 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
- September 18-20

August, September, October, November, December, Sometime in 2021

(Base: Waves 1-28. 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, 613 and 619 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, 11-13 and 18-20, 2020)

Destination Analysts
DO YOUR RESEARCH

DID TRAVELER GET FULL REFUNDS?

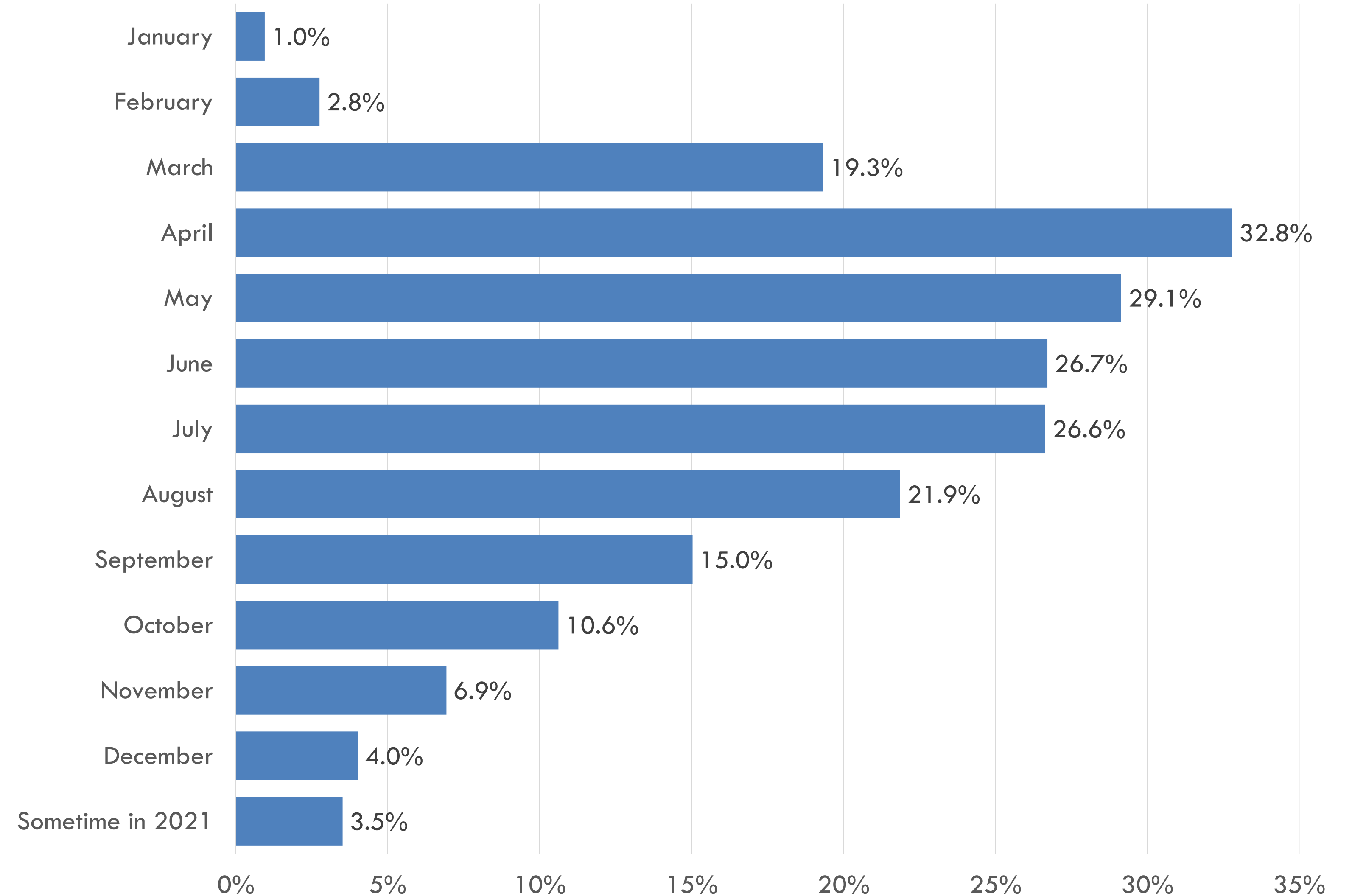**Question:** Did you get full refunds for any reservations you canceled? (Select one)

Historical data

(Base: Wave 28 data. Respondents cancelling a trip, 619 completed surveys. Data collected Sep 18-20, 2020)

Destination Analysts
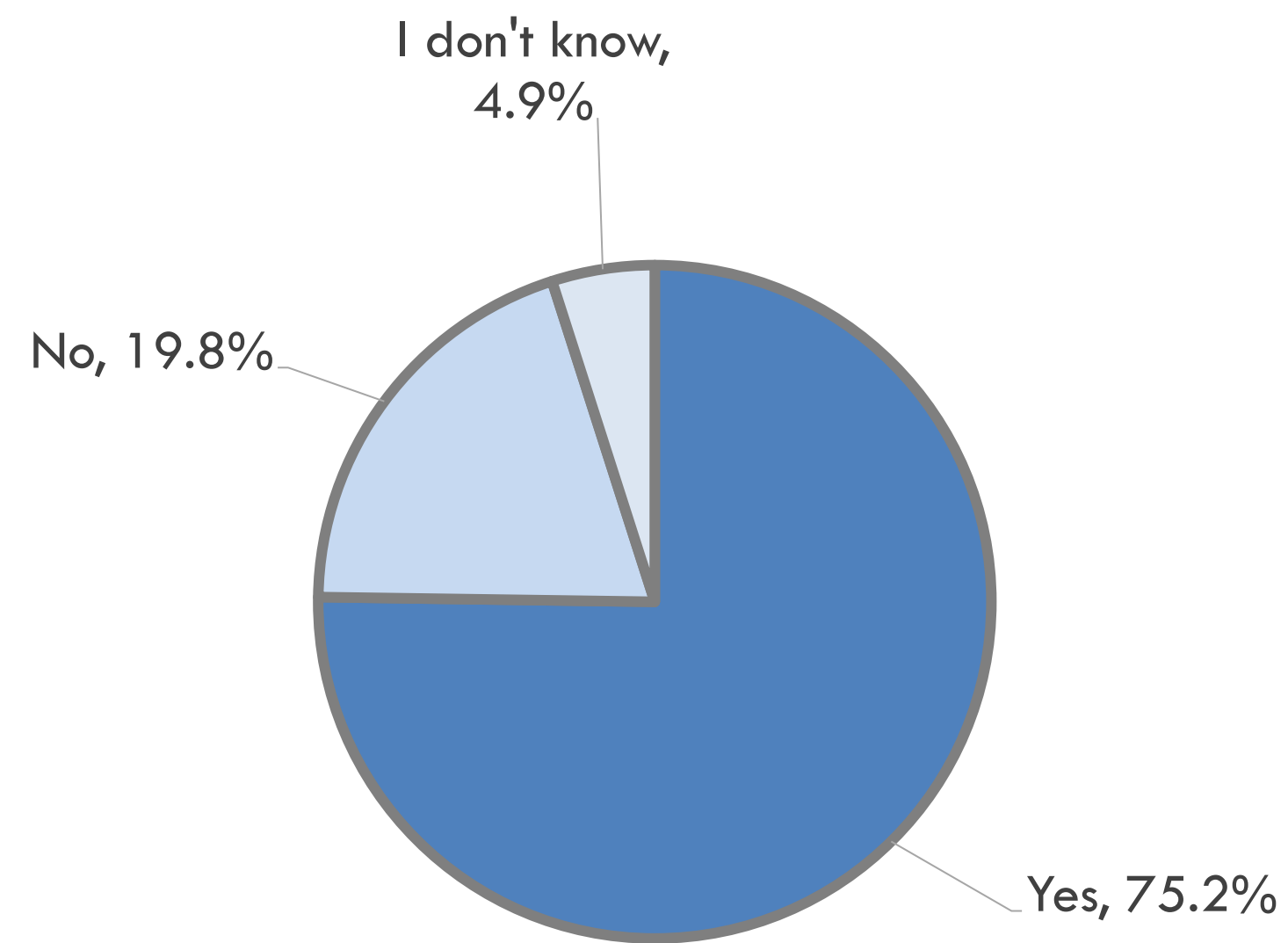DO YOUR RESEARCH

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 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

ROAD & AIR TRIPS EXPECTED

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

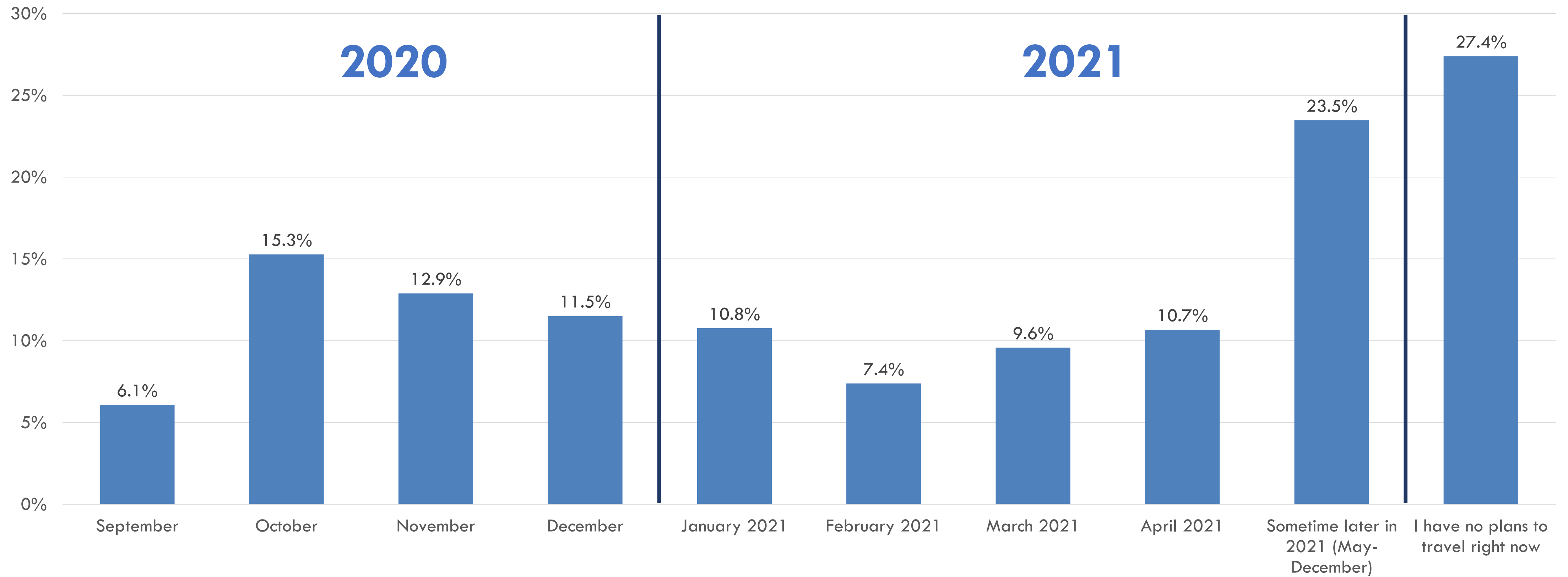**Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?**
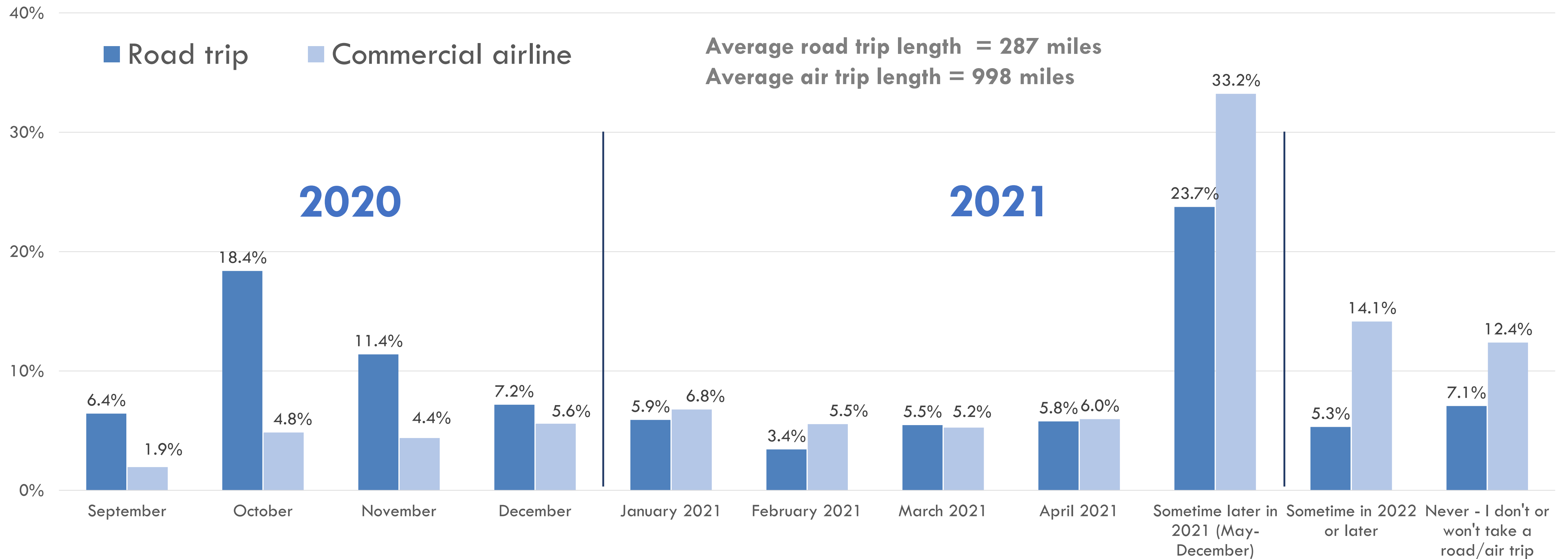
Average road trip length = 287 miles
Average air trip length = 998 miles

- Road trip
- Commercial airline

2020

2021

Month	Road trip	Commercial airline
September	6.4%	1.9%
October	18.4%	4.8%
November	11.4%	4.4%
December	7.2%	5.6%
January 2021	5.9%	6.8%
February 2021	3.4%	5.5%
March 2021	5.5%	5.2%
April 2021	5.8%	6.0%
Sometime later in 2021 (May-December)	23.7%	33.2%
Sometime in 2022 or later	5.3%	14.1%
Never - I don't or won't take a road/air trip	7.1%	12.4%

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Destination Analysts
DO YOUR RESEARCH

SUMMER LEISURE TRIPS

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

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Yes, 32.8%

No, 67.2%

Destination Analysts
DO YOUR RESEARCH
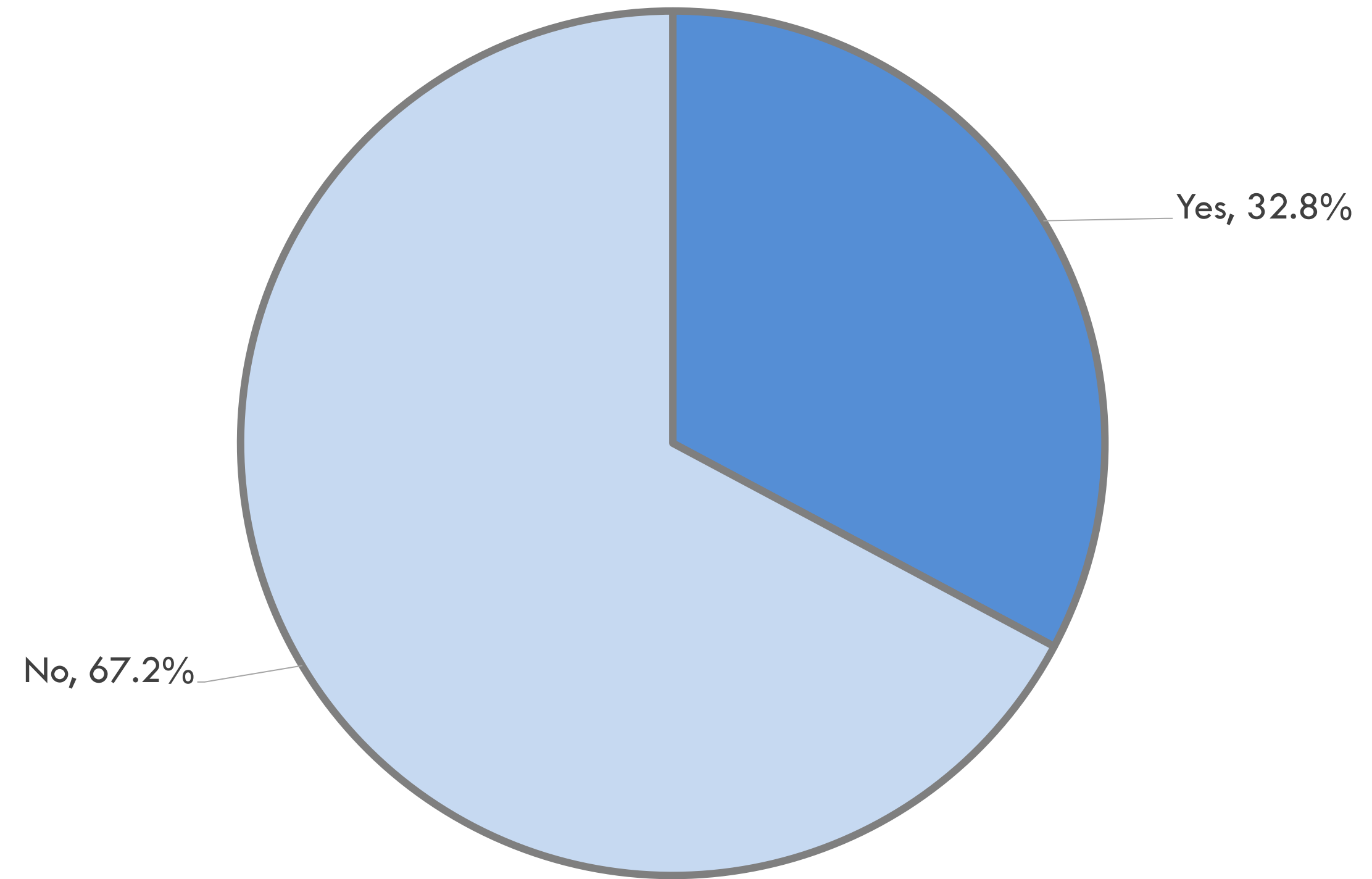
NUMBER OF SUMMER LEISURE TRIPS

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

(Base: Wave 28 data. Respondents taking a summer leisure trip, 405 completed surveys. Data collected Sep 18-20, 2020)

Mean = 2.0

Category	Percentage
5 or more	7.1%
4	4.9%
3	13.2%
2	21.0%
1	53.8%
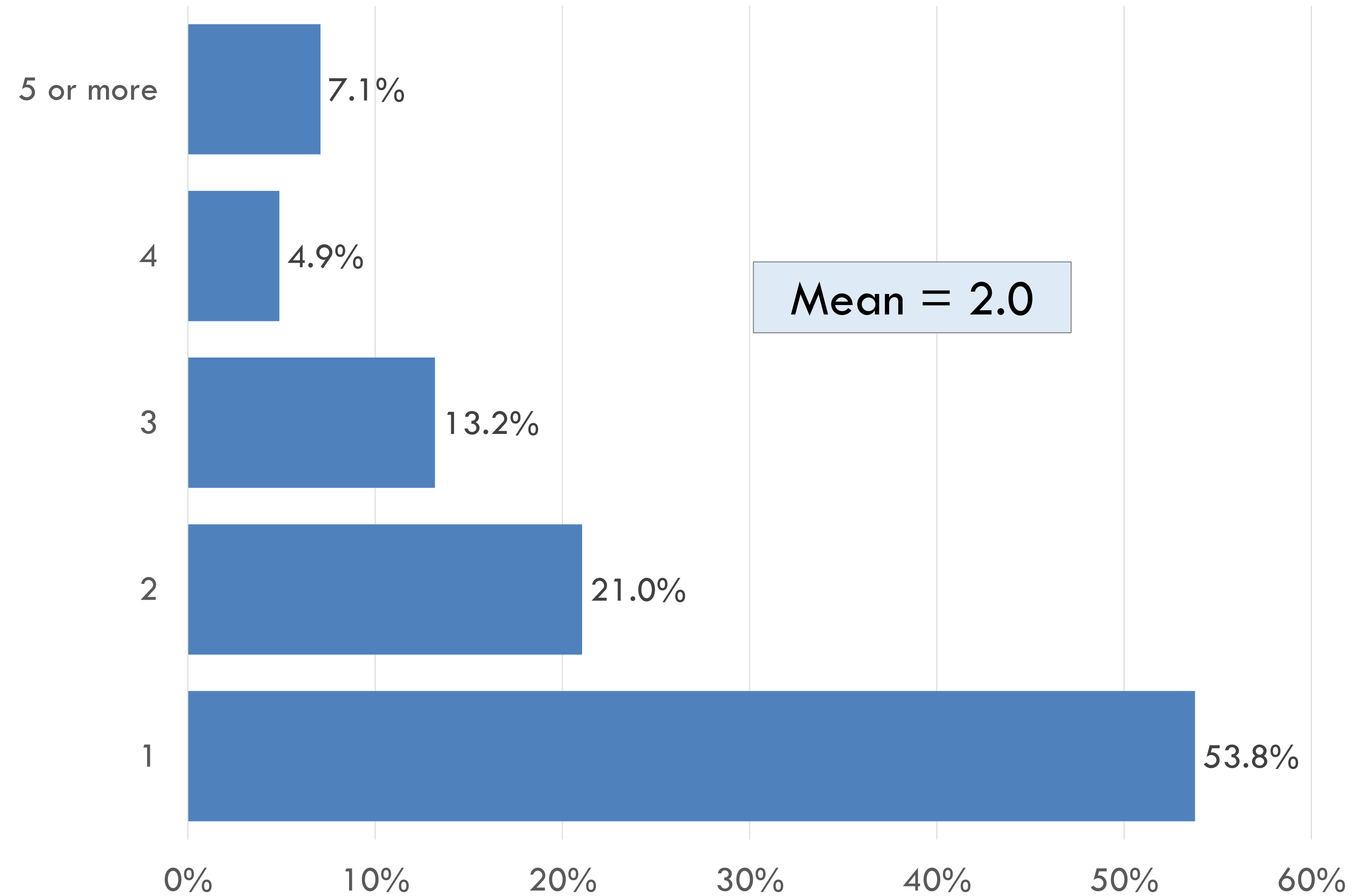
EMOTIONAL BAROMETER

LIFESTYLE PRIORITIES

Question: **Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.**

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

% High priority or Essential priority

Category	Percentage
Staying safe from infection	74.8%
Finding joy or happiness	70.1%
Emotional well-being	67.2%
Relaxation	66.6%
Escape from stress	56.2%
Physical fitness	51.8%
Making money	49.3%
Connecting with others	48.0%
Escape from boredom	47.9%
Healing and recovery	45.6%
Connect with nature	43.4%
Have new experiences	41.4%
Learning/education	32.6%

Destination Analysts
DO YOUR RESEARCH
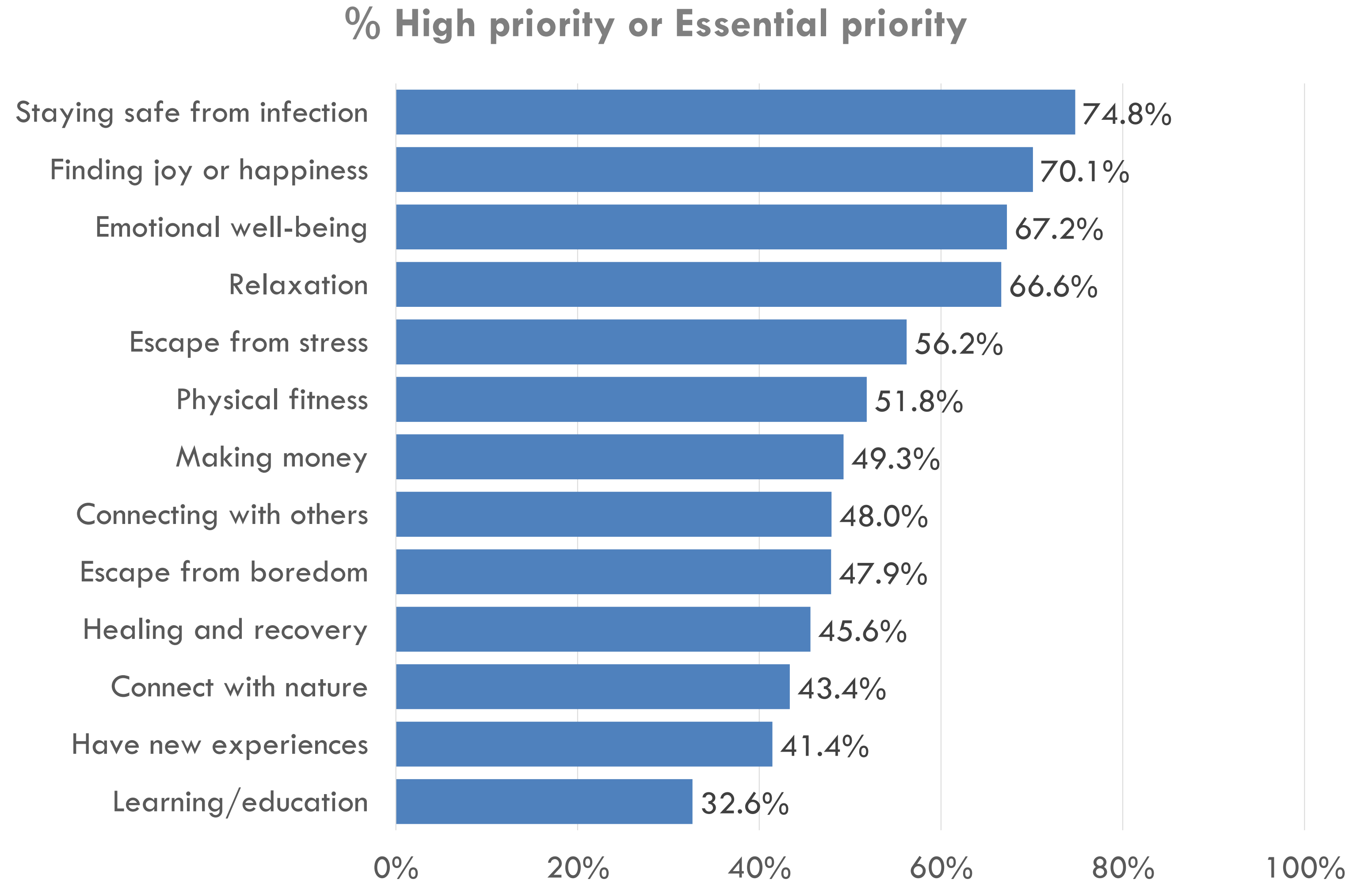
LIFESTYLE PRIORITIES: WHAT'S CHANGING?

Absolute Change from April 2020

Question: Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.

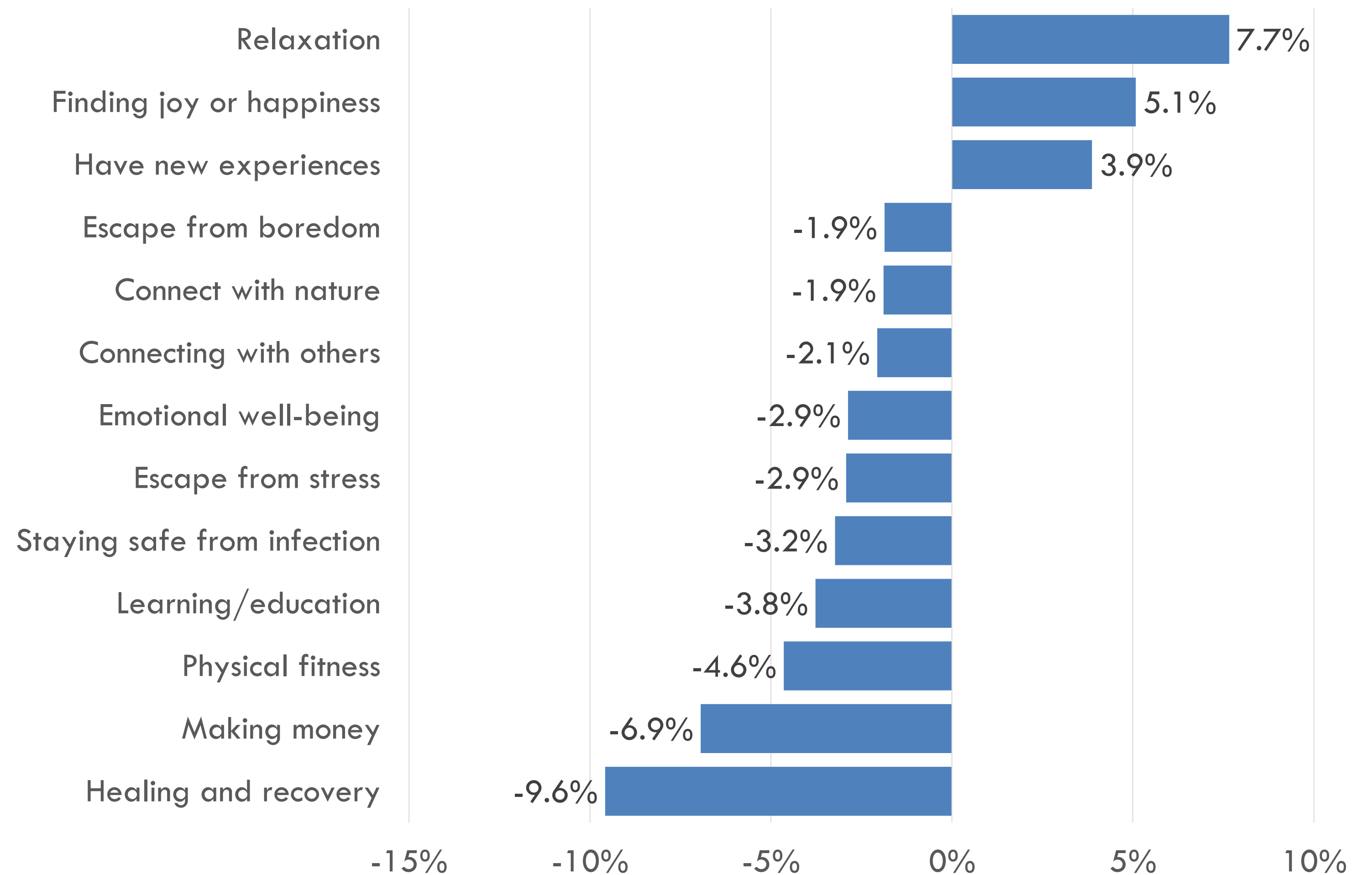*(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)*

Priority	Change
Relaxation	7.7%
Finding joy or happiness	5.1%
Have new experiences	3.9%
Escape from boredom	-1.9%
Connect with nature	-1.9%
Connecting with others	-2.1%
Emotional well-being	-2.9%
Escape from stress	-2.9%
Staying safe from infection	-3.2%
Learning/education	-3.8%
Physical fitness	-4.6%
Making money	-6.9%
Healing and recovery	-9.6%

x-axis: -15%, -10%, -5%, 0%, 5%, 10%

Destination Analysts
DO YOUR RESEARCH
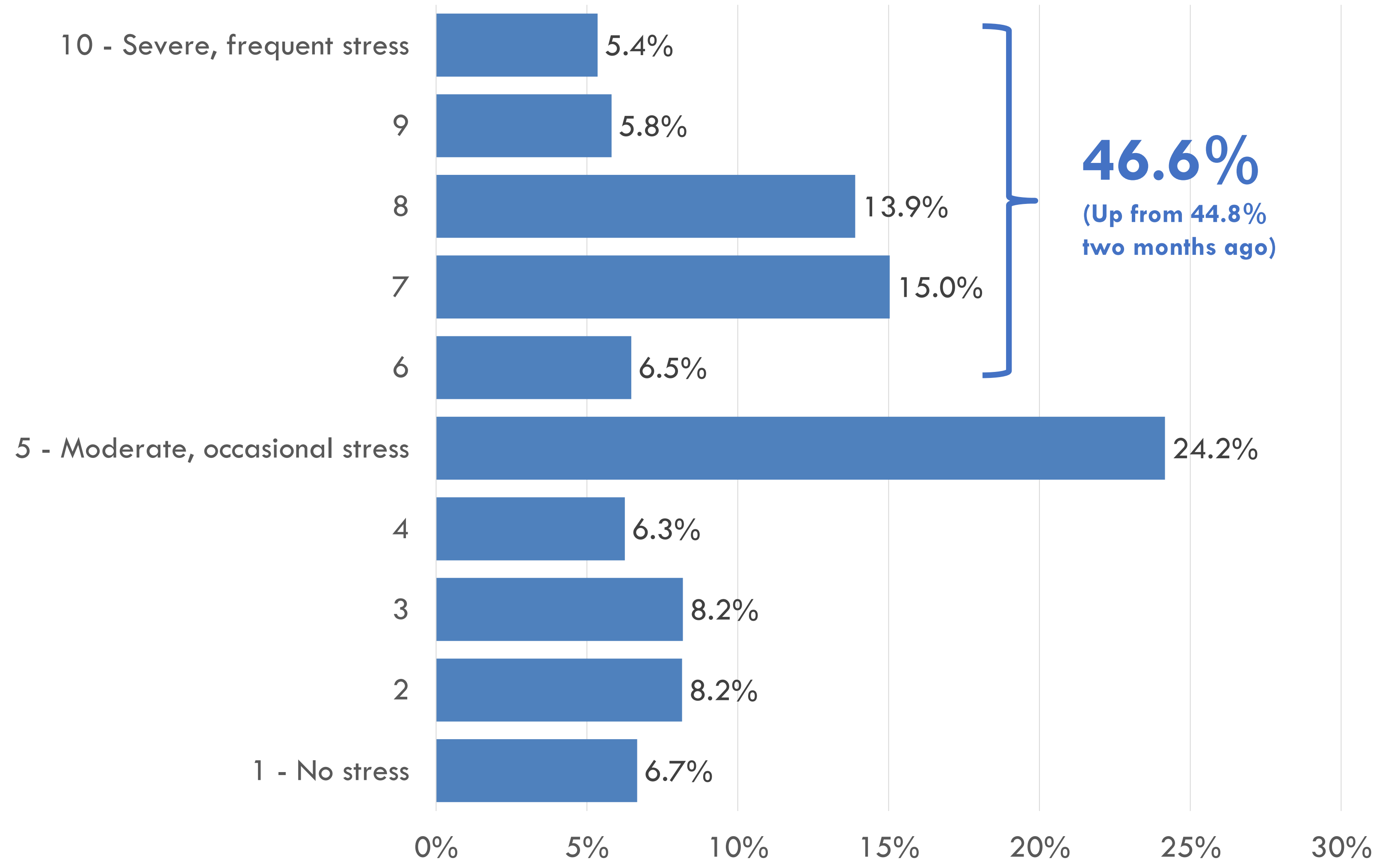
DAILY STRESS LEVELS

Question: **Thinking about the last month, please rate your average level of daily stress from 1 - 10.**

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

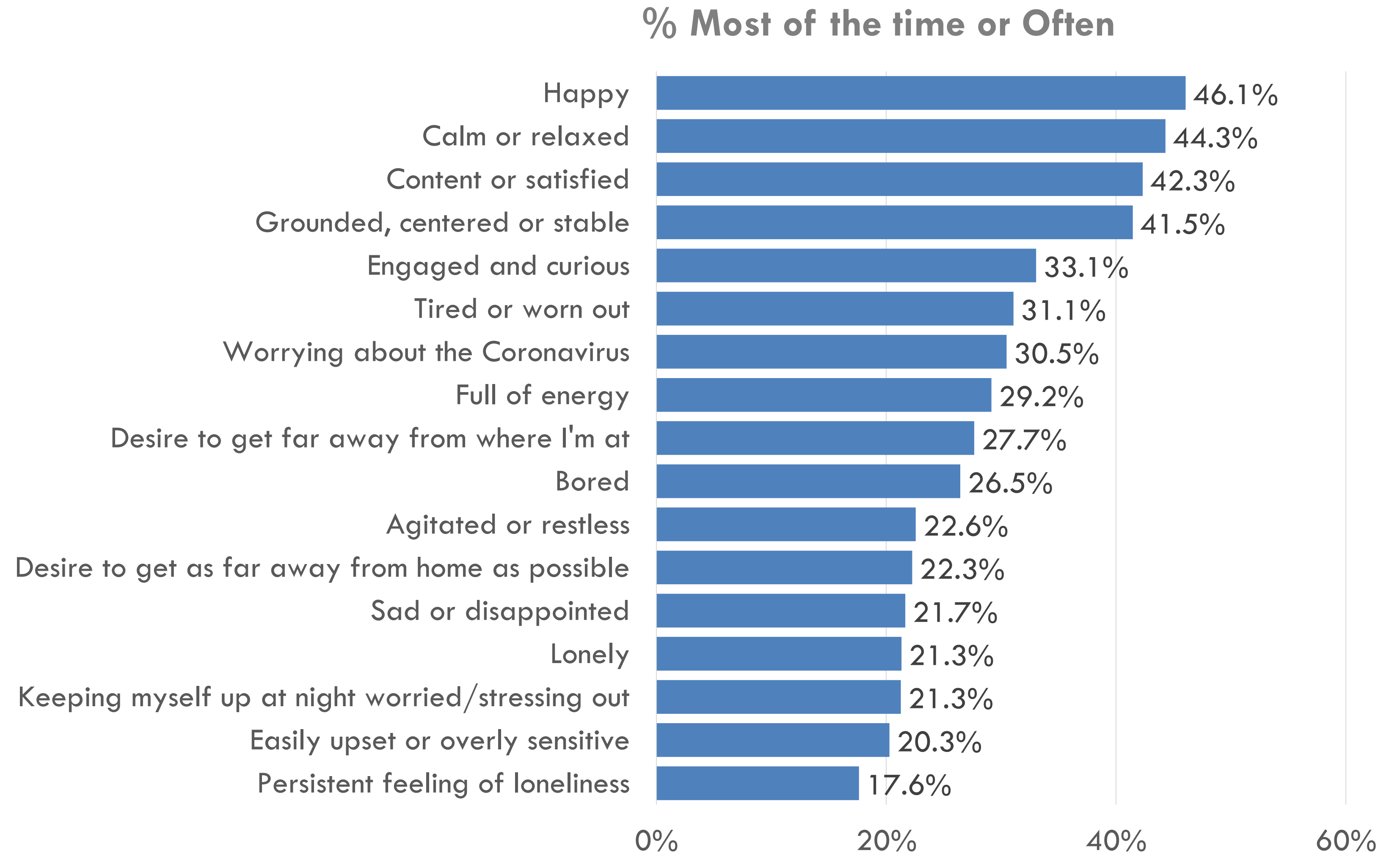
10 - Severe, frequent stress — 5.4%
9 — 5.8%
8 — 13.9%
7 — 15.0%
6 — 6.5%
5 - Moderate, occasional stress — 24.2%
4 — 6.3%
3 — 8.2%
2 — 8.2%
1 - No stress — 6.7%

46.6% **(Up from 44.8% two months ago)**

Destination Analysts
DO YOUR RESEARCH

FEELINGS IN THE PAST MONTH

Question: Please tell us about how you have been feeling **DURING THE LAST MONTH.**

Using the scale below, tell us how often you feel each.

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

% Most of the time or Often

Feeling	%
Happy	46.1%
Calm or relaxed	44.3%
Content or satisfied	42.3%
Grounded, centered or stable	41.5%
Engaged and curious	33.1%
Tired or worn out	31.1%
Worrying about the Coronavirus	30.5%
Full of energy	29.2%
Desire to get far away from where I'm at	27.7%
Bored	26.5%
Agitated or restless	22.6%
Desire to get as far away from home as possible	22.3%
Sad or disappointed	21.7%
Lonely	21.3%
Keeping myself up at night worried/stressing out	21.3%
Easily upset or overly sensitive	20.3%
Persistent feeling of loneliness	17.6%

Destination Analysts
DO YOUR RESEARCH

Absolute Change in Past 2 Months

Question: **Please tell us about how you have been feeling DURING THE LAST MONTH.**

Using the scale below, tell us how often you feel each?

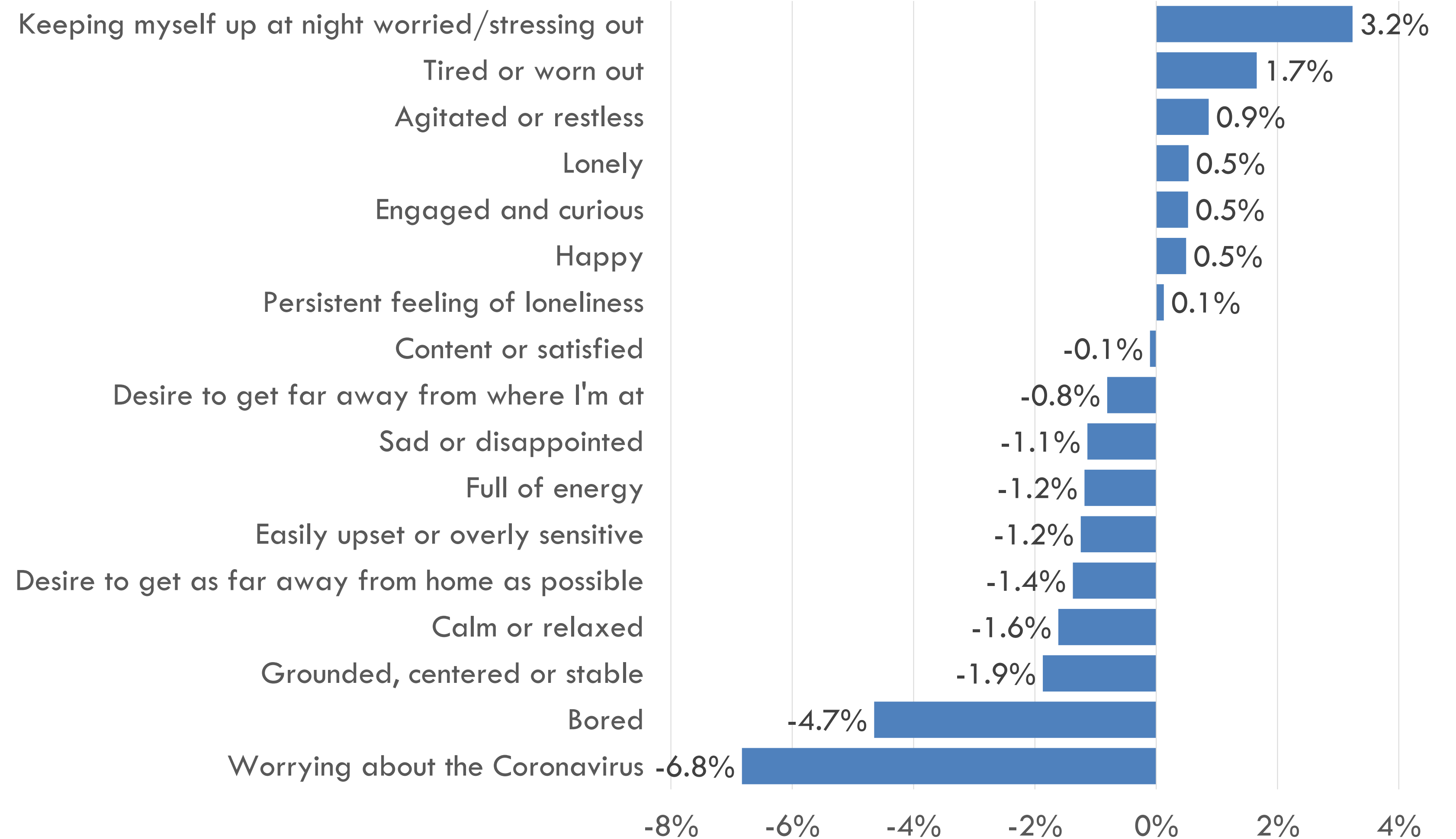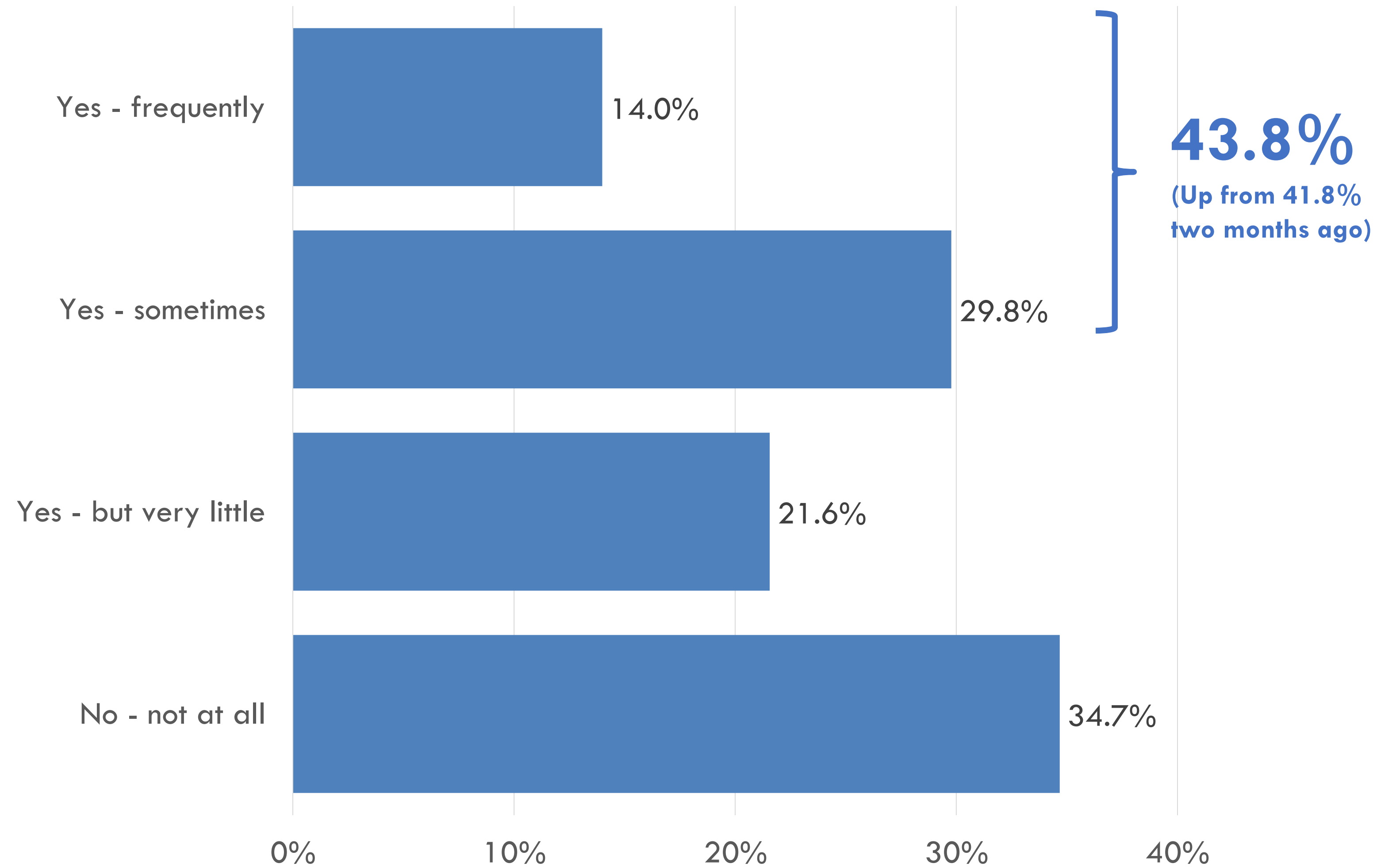*(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)*

Feeling	Change
Keeping myself up at night worried/stressing out	3.2%
Tired or worn out	1.7%
Agitated or restless	0.9%
Lonely	0.5%
Engaged and curious	0.5%
Happy	0.5%
Persistent feeling of loneliness	0.1%
Content or satisfied	-0.1%
Desire to get far away from where I'm at	-0.8%
Sad or disappointed	-1.1%
Full of energy	-1.2%
Easily upset or overly sensitive	-1.2%
Desire to get as far away from home as possible	-1.4%
Calm or relaxed	-1.6%
Grounded, centered or stable	-1.9%
Bored	-4.7%
Worrying about the Coronavirus	-6.8%

Destination Analysts
DO YOUR RESEARCH

SLEEP PATTERNS

Question: Since the Coronavirus has emerged, have you experienced any sleep disturbances or changes in your sleep pattern?

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Yes - frequently — 14.0%

Yes - sometimes — 29.8%

Yes - but very little — 21.6%

No - not at all — 34.7%

43.8%
(Up from 41.8% two months ago)

Destination Analysts
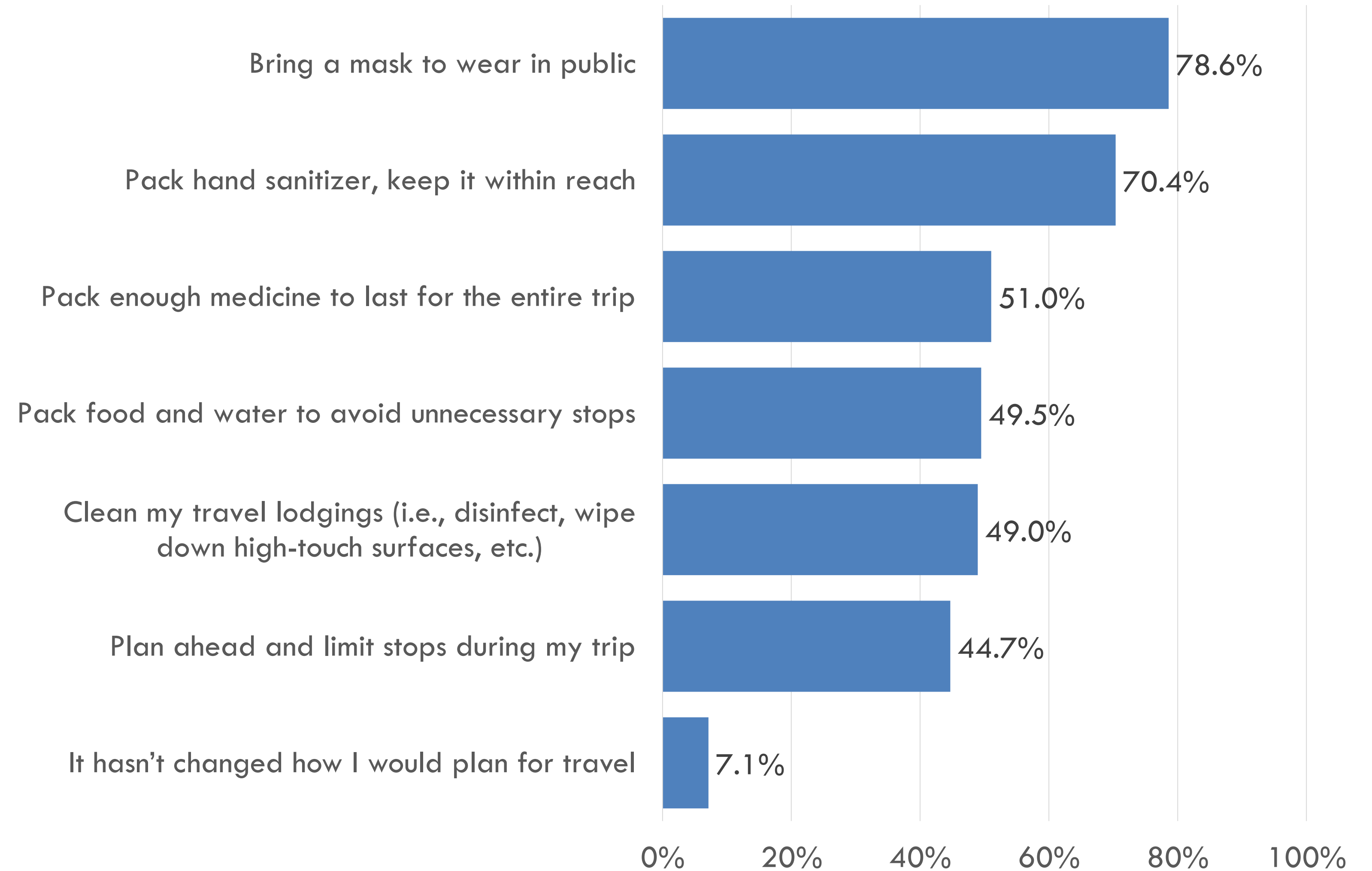DO YOUR RESEARCH

PANDEMIC TRAVEL BEHAVIORS

PANDEMIC'S IMPACT ON TRAVEL PLANNING

Question: **How (if at all) has the coronavirus situation affected the way you would plan before traveling? (Select all that apply)**

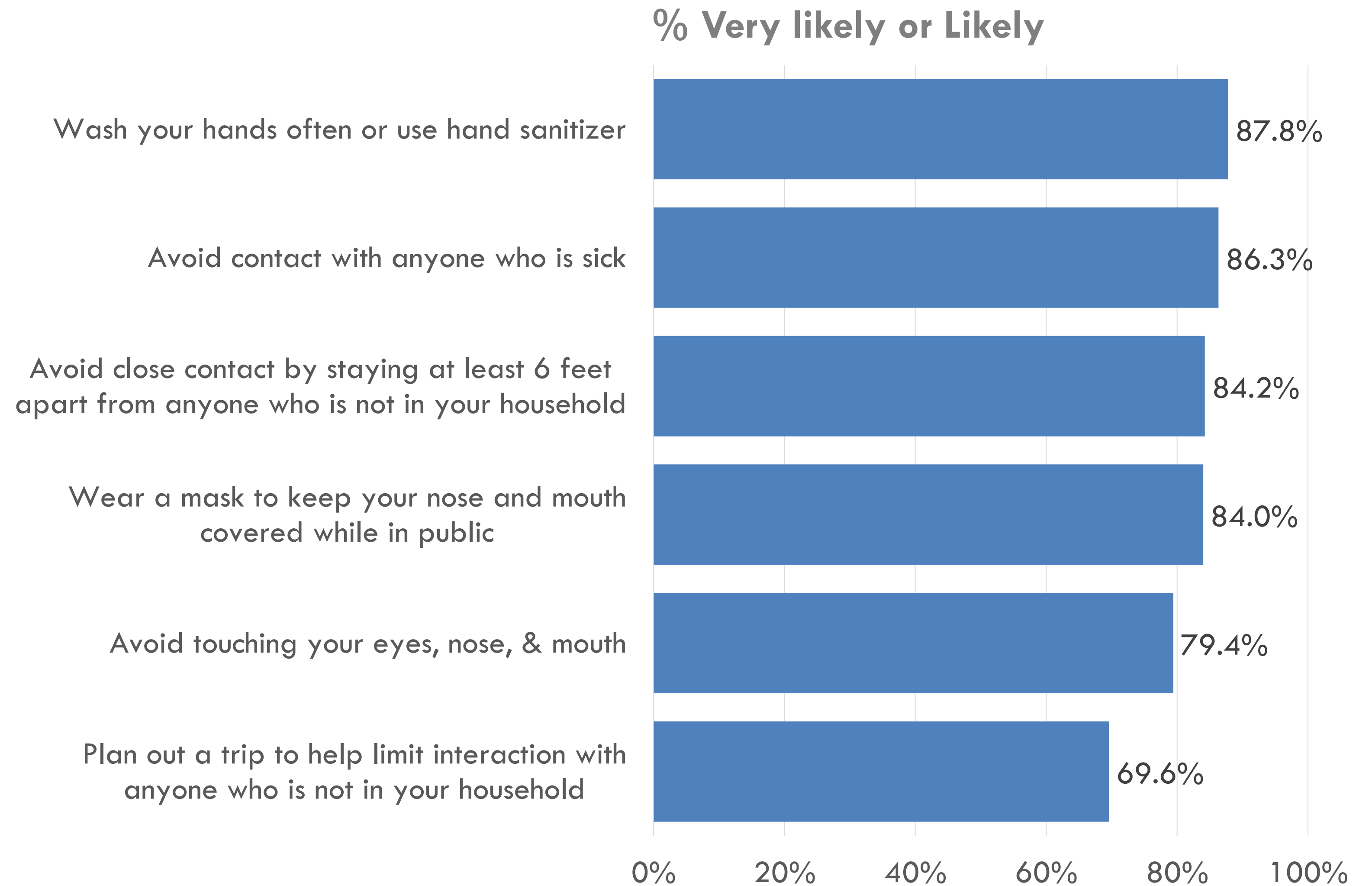**Due to the coronavirus situation, If I were traveling, I would plan to _____.**

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Bring a mask to wear in public — 78.6%

Pack hand sanitizer, keep it within reach — 70.4%

Pack enough medicine to last for the entire trip — 51.0%

Pack food and water to avoid unnecessary stops — 49.5%

Clean my travel lodgings (i.e., disinfect, wipe down high-touch surfaces, etc.) — 49.0%

Plan ahead and limit stops during my trip — 44.7%

It hasn't changed how I would plan for travel — 7.1%

LIKELIHOOD DURING TRAVEL

Question: At this moment, how likely would you be to do each of the following if traveling?

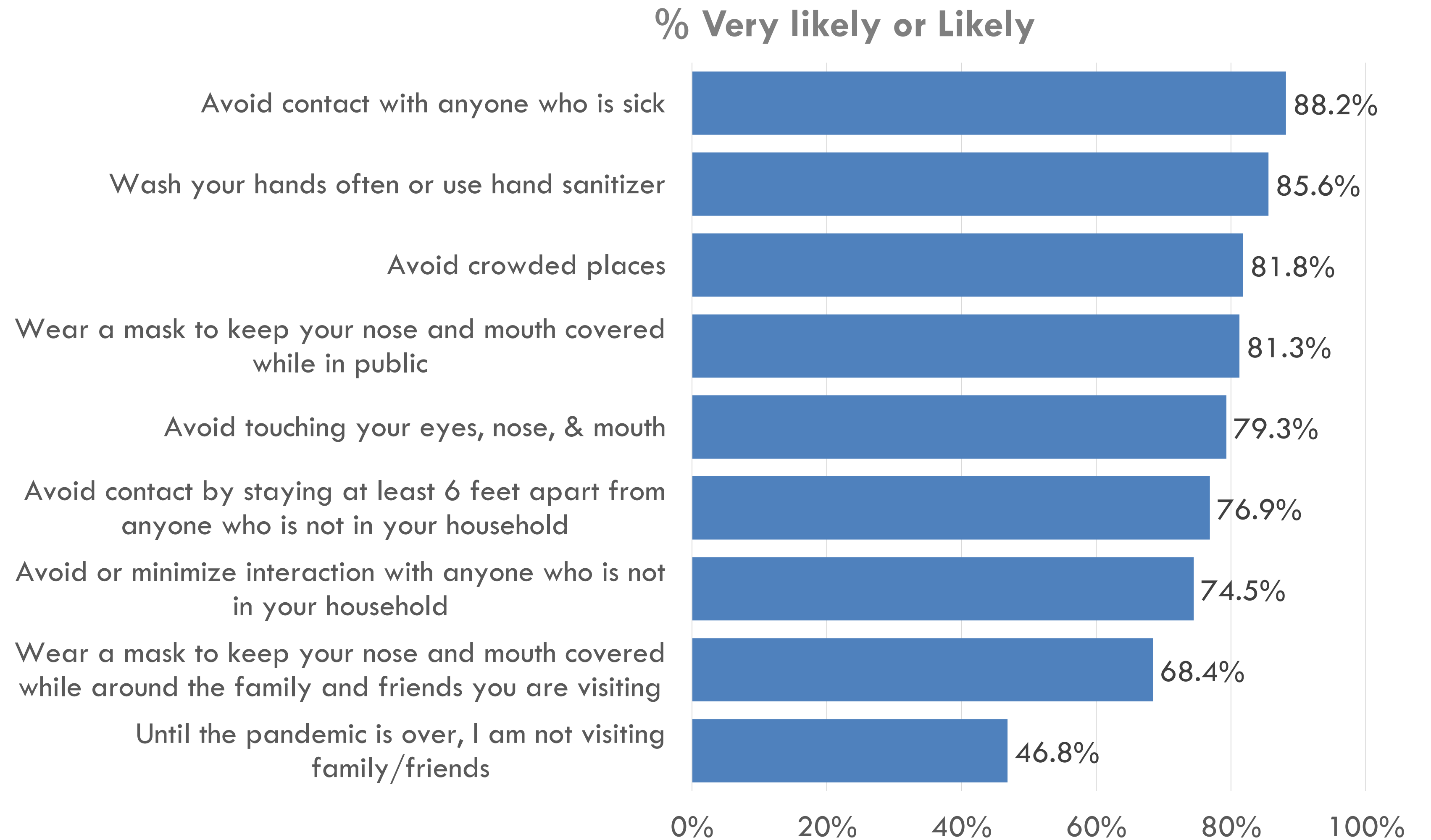*(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)*

% Very likely or Likely

Wash your hands often or use hand sanitizer — 87.8%

Avoid contact with anyone who is sick — 86.3%

Avoid close contact by staying at least 6 feet apart from anyone who is not in your household — 84.2%

Wear a mask to keep your nose and mouth covered while in public — 84.0%

Avoid touching your eyes, nose, & mouth — 79.4%

Plan out a trip to help limit interaction with anyone who is not in your household — 69.6%

Destination Analysts
DO YOUR RESEARCH

LIKELIHOOD WHILE VISITING FRIENDS & FAMILY

Question: **For the next question, please consider your friends and family who might live outside your current place of residence.**

At this moment, how likely would you be to do each of the following if spending time with your family/friends?

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)
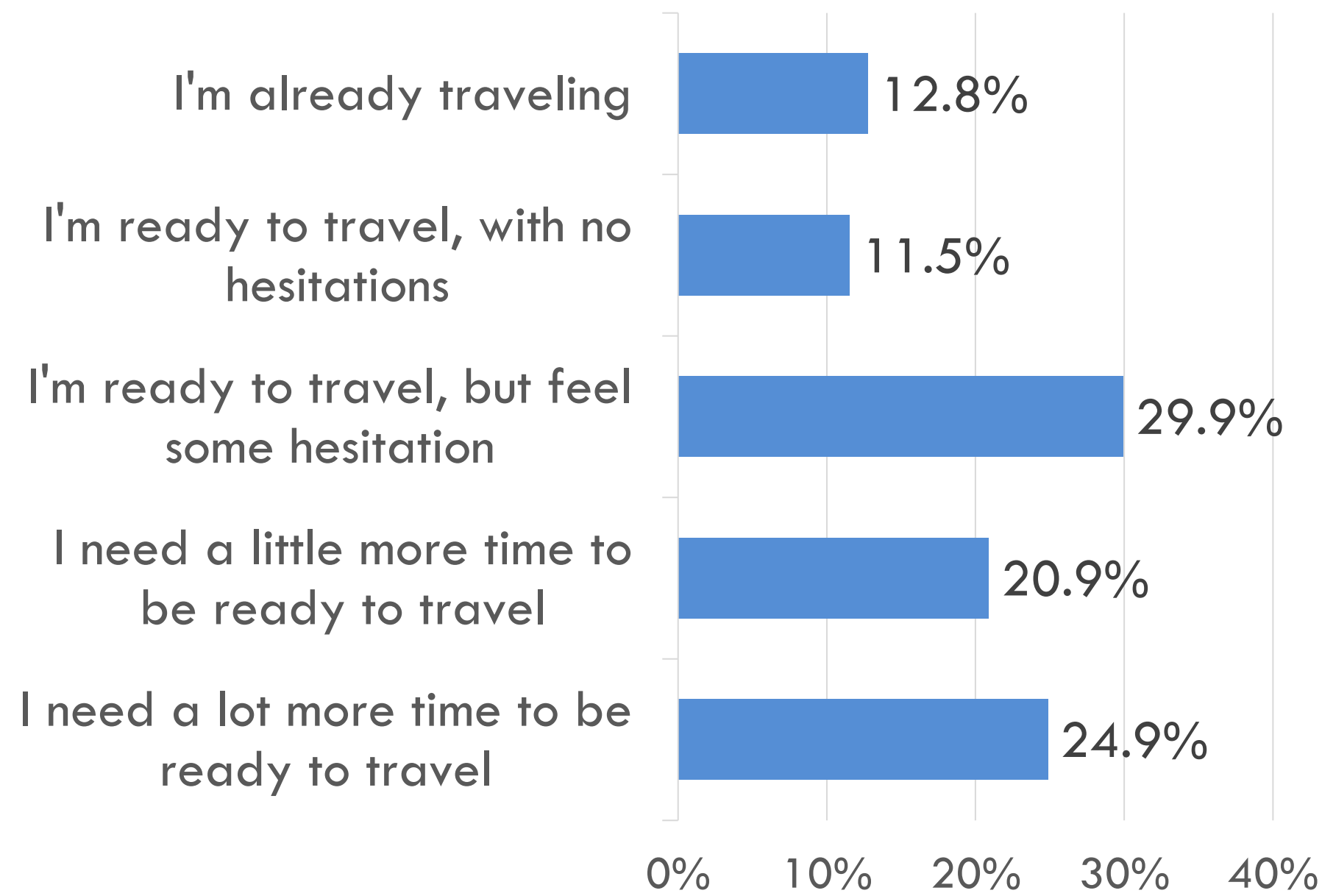
% Very likely or Likely

Avoid contact with anyone who is sick	88.2%
Wash your hands often or use hand sanitizer	85.6%
Avoid crowded places	81.8%
Wear a mask to keep your nose and mouth covered while in public	81.3%
Avoid touching your eyes, nose, & mouth	79.3%
Avoid contact by staying at least 6 feet apart from anyone who is not in your household	76.9%
Avoid or minimize interaction with anyone who is not in your household	74.5%
Wear a mask to keep your nose and mouth covered while around the family and friends you are visiting	68.4%
Until the pandemic is over, I am not visiting family/friends	46.8%

Destination Analysts
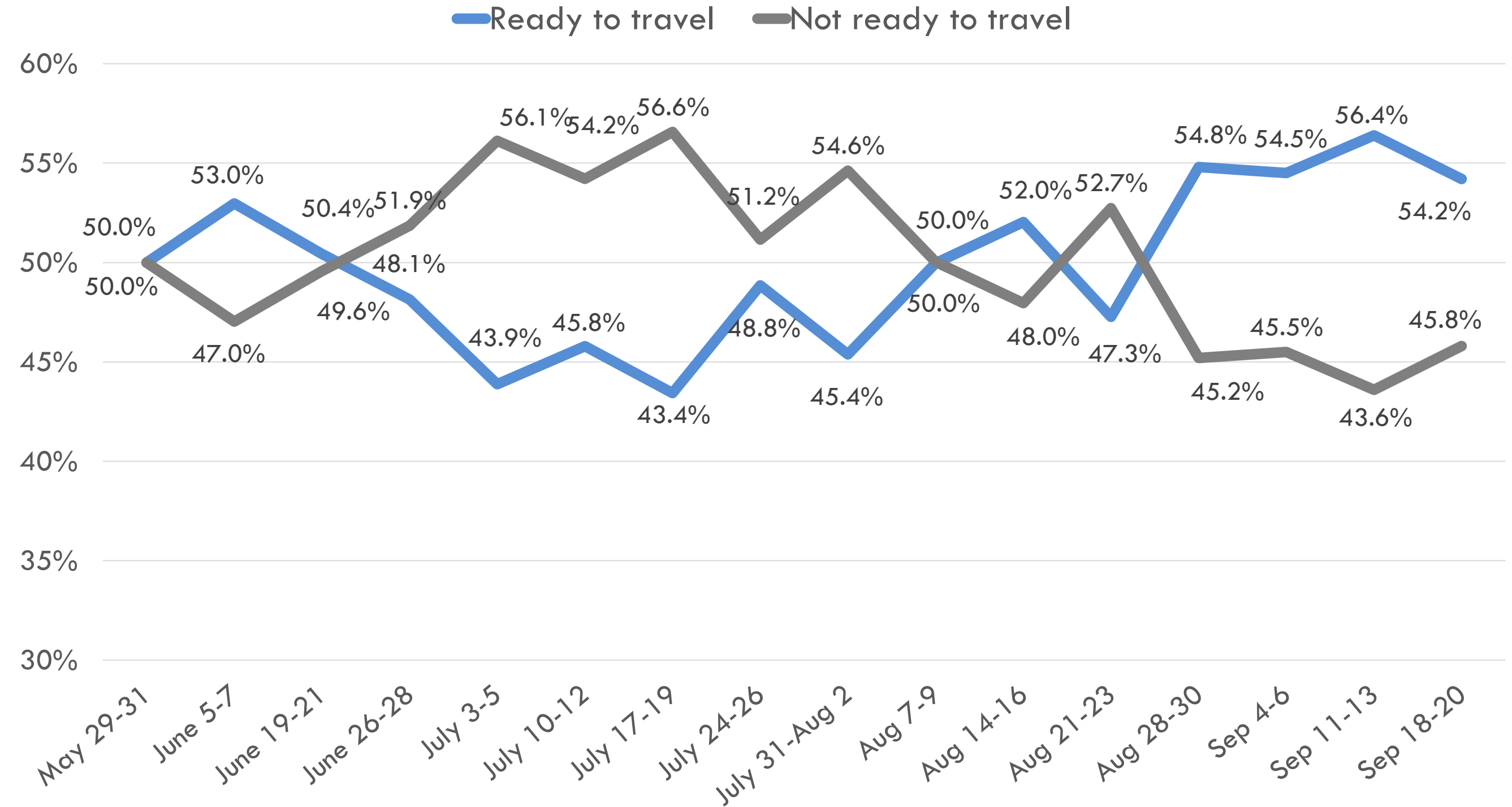DO YOUR RESEARCH

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)**

I'm already traveling — 12.8%

I'm ready to travel, with no hesitations — 11.5%

I'm ready to travel, but feel some hesitation — 29.9%

I need a little more time to be ready to travel — 20.9%

I need a lot more time to be ready to travel — 24.9%

(Base: Waves 12-13 and 15-28. 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, 1,205 and 1,200 completed surveys.)

Historical data

Ready to travel — Not ready to travel

Ready to travel: 50.0%, 53.0%, 50.4%, 48.1%, 43.9%, 45.8%, 43.4%, 48.8%, 45.4%, 50.0%, 52.0%, 47.3%, 54.8%, 54.5%, 56.4%, 54.2%

Not ready to travel: 50.0%, 47.0%, 49.6%, 51.9%, 56.1%, 54.2%, 56.6%, 51.2%, 54.6%, 50.0%, 48.0%, 52.7%, 45.2%, 45.5%, 43.6%, 45.8%

Dates: May 29-31, June 5-7, June 19-21, June 26-28, July 3-5, July 10-12, July 17-19, July 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

Destination Analysts
DO YOUR RESEARCH
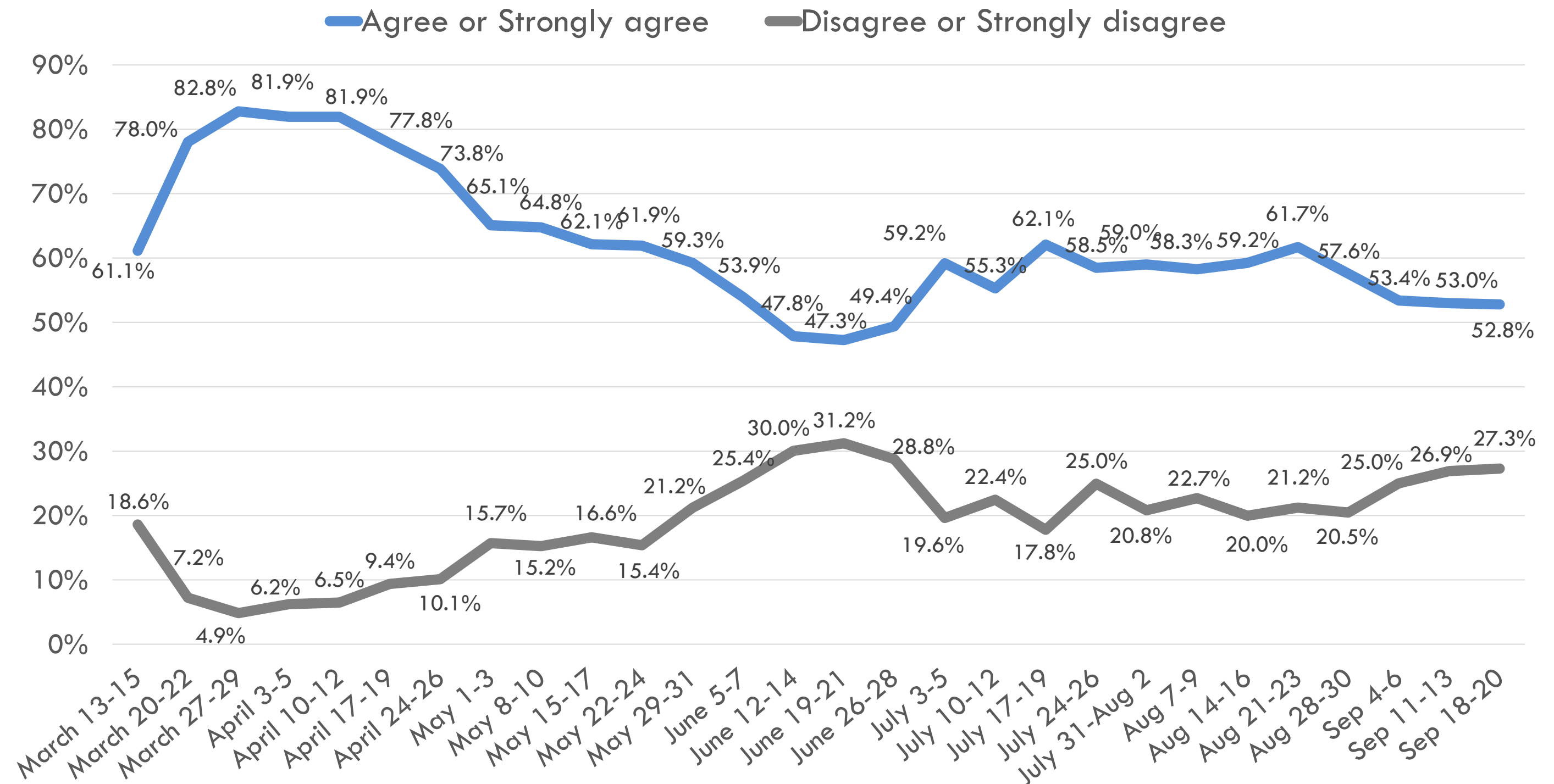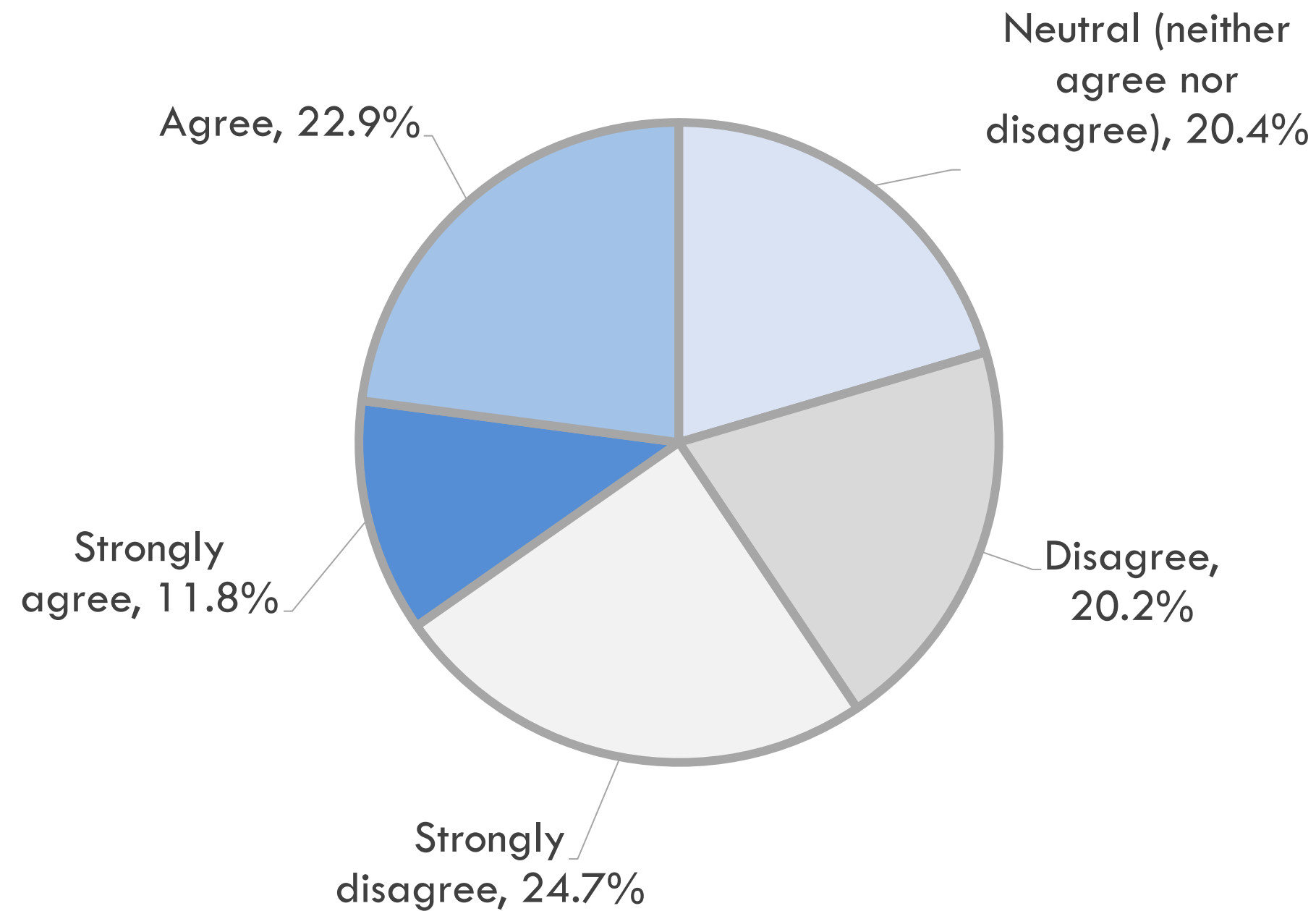
AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

How much do you agree with the following statement?

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

Agree, 25.6%

Neutral (neither agree nor disagree), 19.9%

Strongly agree, 27.2%

Disagree, 18.2%

Strongly disagree, 9.2%

Historical data

Agree or Strongly agree — Disagree or Strongly disagree

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)
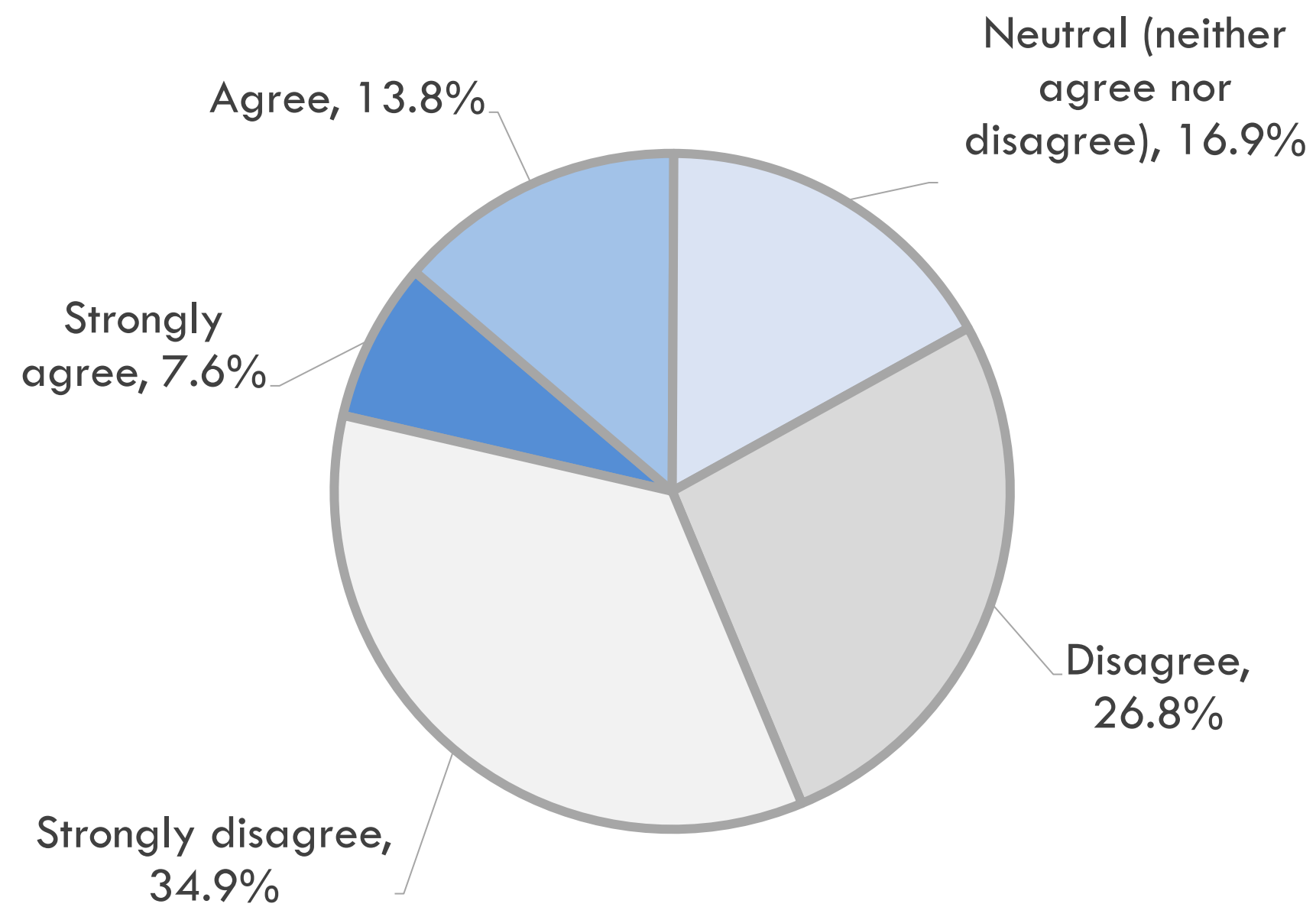
Agree or Strongly agree: 61.1%, 78.0%, 82.8%, 81.9%, 81.9%, 77.8%, 73.8%, 65.1%, 64.8%, 62.1%, 61.9%, 59.3%, 53.9%, 47.8%, 47.3%, 49.4%, 59.2%, 55.3%, 62.1%, 58.5%, 59.0%, 58.3%, 59.2%, 61.7%, 57.6%, 53.4%, 53.0%, 52.8%

Disagree or Strongly disagree: 18.6%, 7.2%, 4.9%, 6.2%, 6.5%, 9.4%, 10.1%, 15.7%, 15.2%, 16.6%, 15.4%, 21.2%, 25.4%, 30.0%, 31.2%, 28.8%, 19.6%, 22.4%, 17.8%, 25.0%, 20.8%, 22.7%, 20.0%, 21.2%, 20.5%, 25.0%, 26.9%, 27.3%

March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

Destination Analysts
DO YOUR RESEARCH

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.

Agree, 22.9%

Neutral (neither agree nor disagree), 20.4%

Strongly agree, 11.8%

Disagree, 20.2%

Strongly disagree, 24.7%

Historical data

Agree or Strongly agree — Disagree or Strongly disagree

	Agree or Strongly agree	Disagree or Strongly disagree
April 3-5	53.1%	16.4%
April 10-12	51.3%	20.7%
April 17-19	51.2%	20.9%
April 24-26	48.0%	23.1%
May 1-3	48.2%	24.0%
May 8-10	42.3%	30.3%
May 15-17	41.8%	29.8%
May 22-24	35.6%	31.2%
May 29-31	44.0%	26.7%
June 5-7	49.6%	25.6%
June 12-14	46.0%	28.1%
June 19-21	45.0%	28.2%
June 26-28	39.7%	34.2%
July 3-5	38.0%	36.2%
July 10-12	39.3%	35.7%
July 17-19	34.2%	41.4%
July 24-26	38.0%	40.0%
July 31-Aug 2	29.9%	46.6%
Aug 7-9	34.5%	42.9%
Aug 14-16	32.4%	43.8%
Aug 21-23	35.9%	47.2%
Aug 28-30	29.8%	41.8%
Sep 4-6	32.4%	42.2%
Sep 11-13	37.0%	45.7%
Sep 18-20	34.7%	44.8%

(Base: Waves 4-28. 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, 1,205 and 1,200 completed surveys.)

Destination Analysts
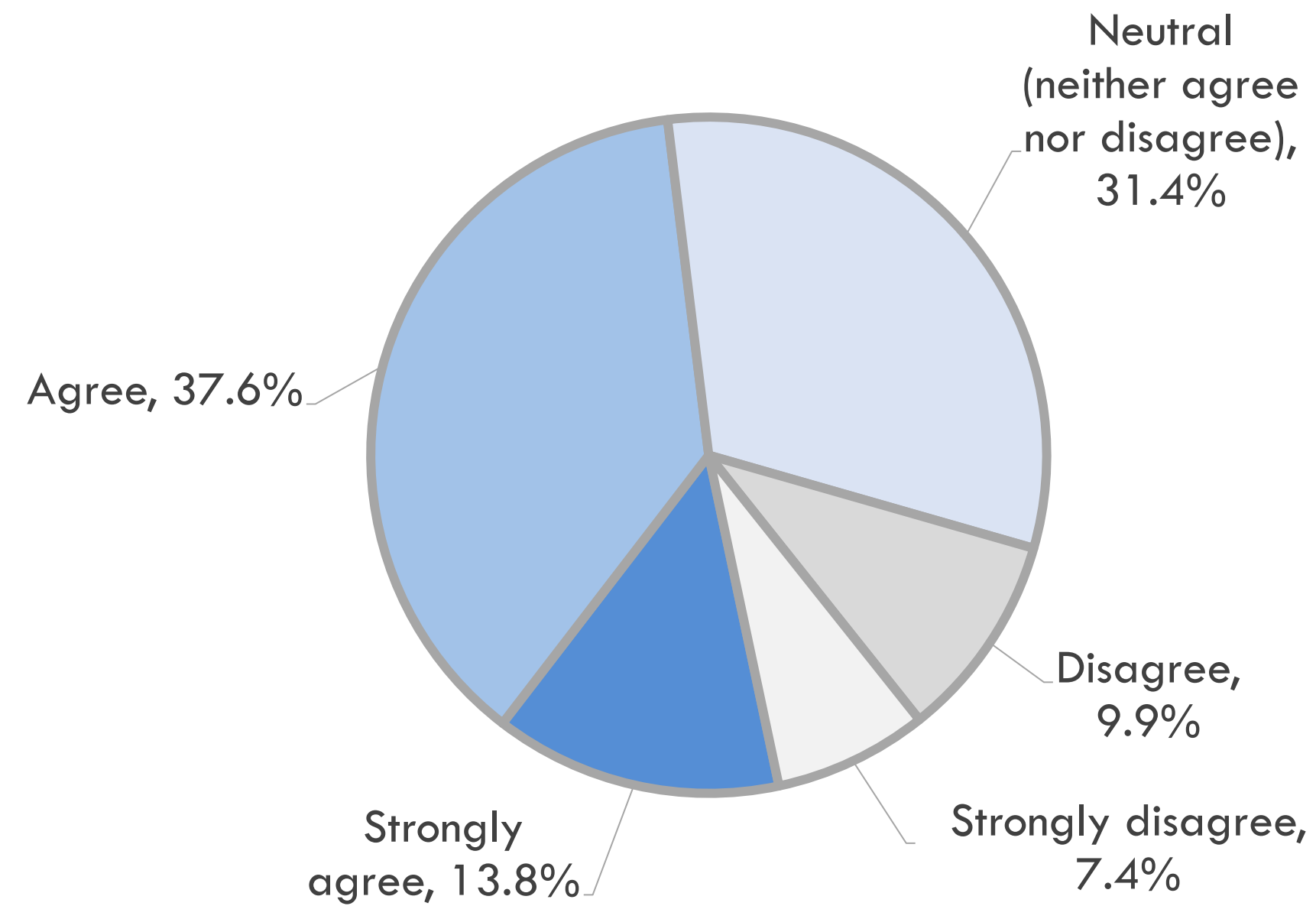DO YOUR RESEARCH
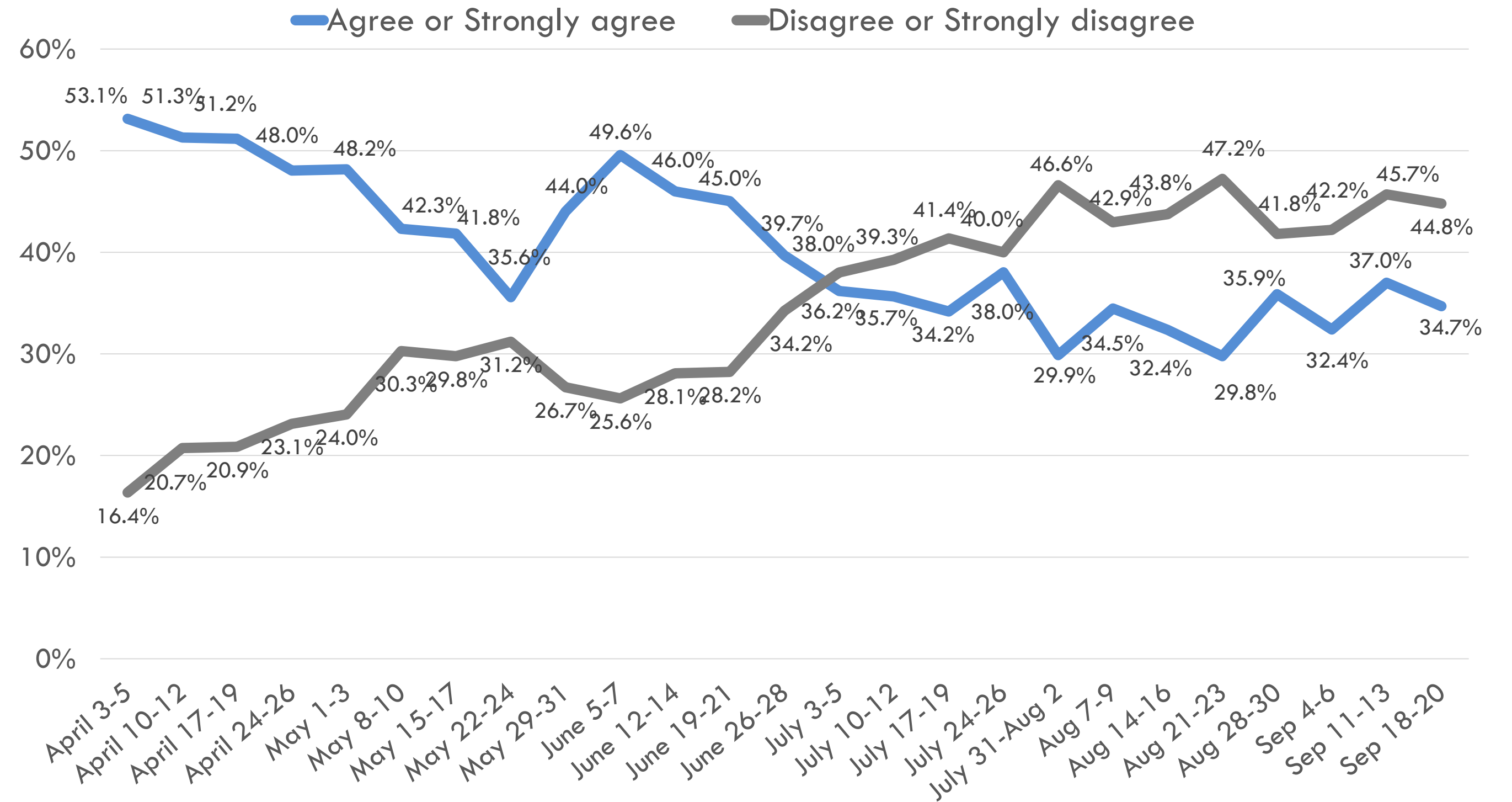
EXPECTATIONS FOR THE PANDEMIC'S COURSE AT THE END OF 2020

How much do you agree with the following statement?

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

Pie chart:
- Neutral (neither agree nor disagree), 16.9%
- Agree, 13.8%
- Strongly agree, 7.6%
- Strongly disagree, 34.9%
- Disagree, 26.8%

Historical data

Line chart legend: ── Agree or Strongly agree ── Disagree or Strongly disagree

Disagree or Strongly disagree: 60.6%, 54.0%, 54.8%, 59.6%, 61.6%
Agree or Strongly agree: 19.3%, 25.2%, 22.5%, 22.6%, 21.5%

X-axis: Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

(Base: Waves 24-28. All respondents, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Destination Analysts
DO YOUR RESEARCH
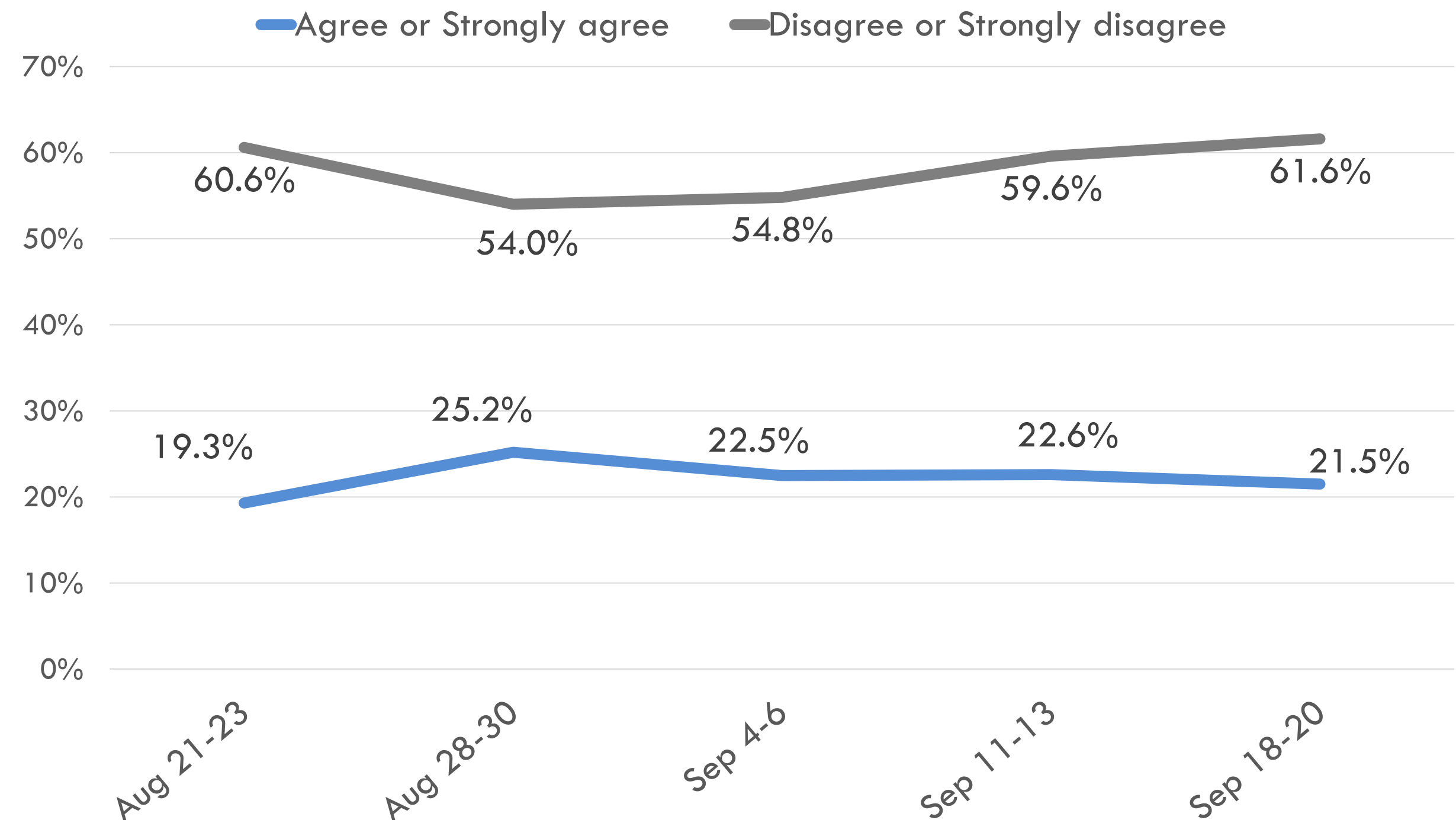
DISCOUNTS AND PRICE CUTS

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.
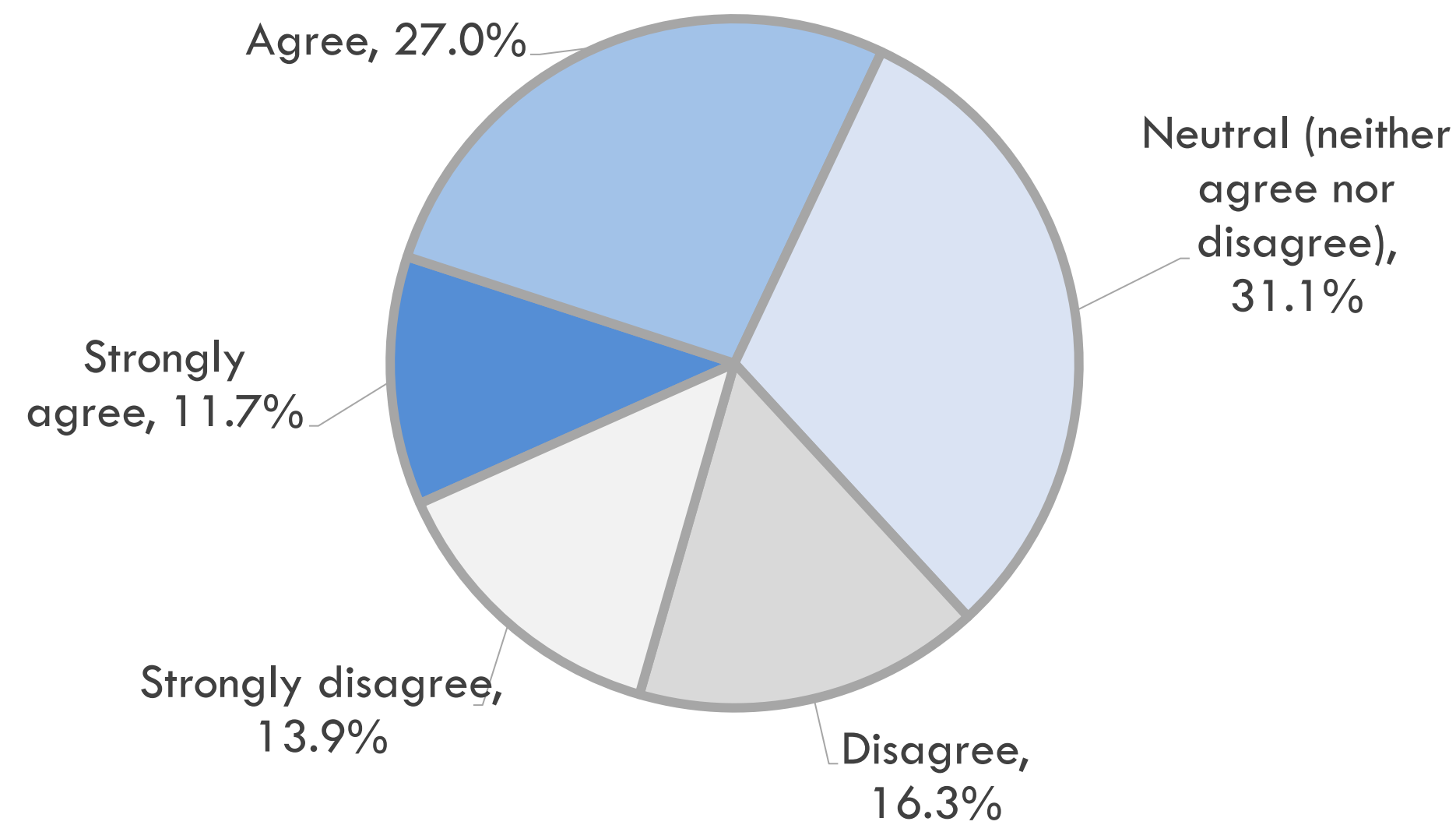
Agree, 27.0%

Neutral (neither agree nor disagree), 31.1%

Strongly agree, 11.7%

Strongly disagree, 13.9%

Disagree, 16.3%

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)
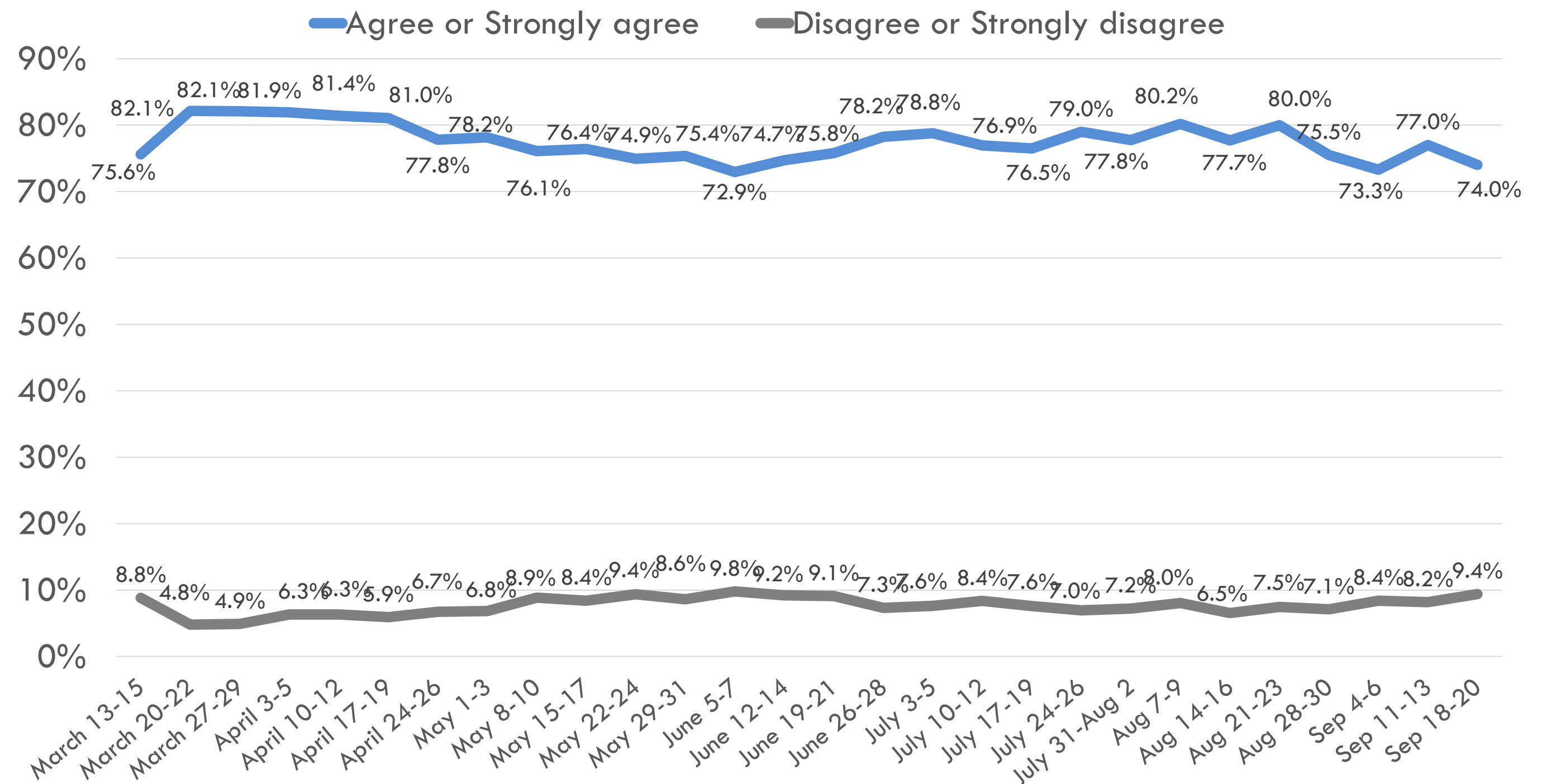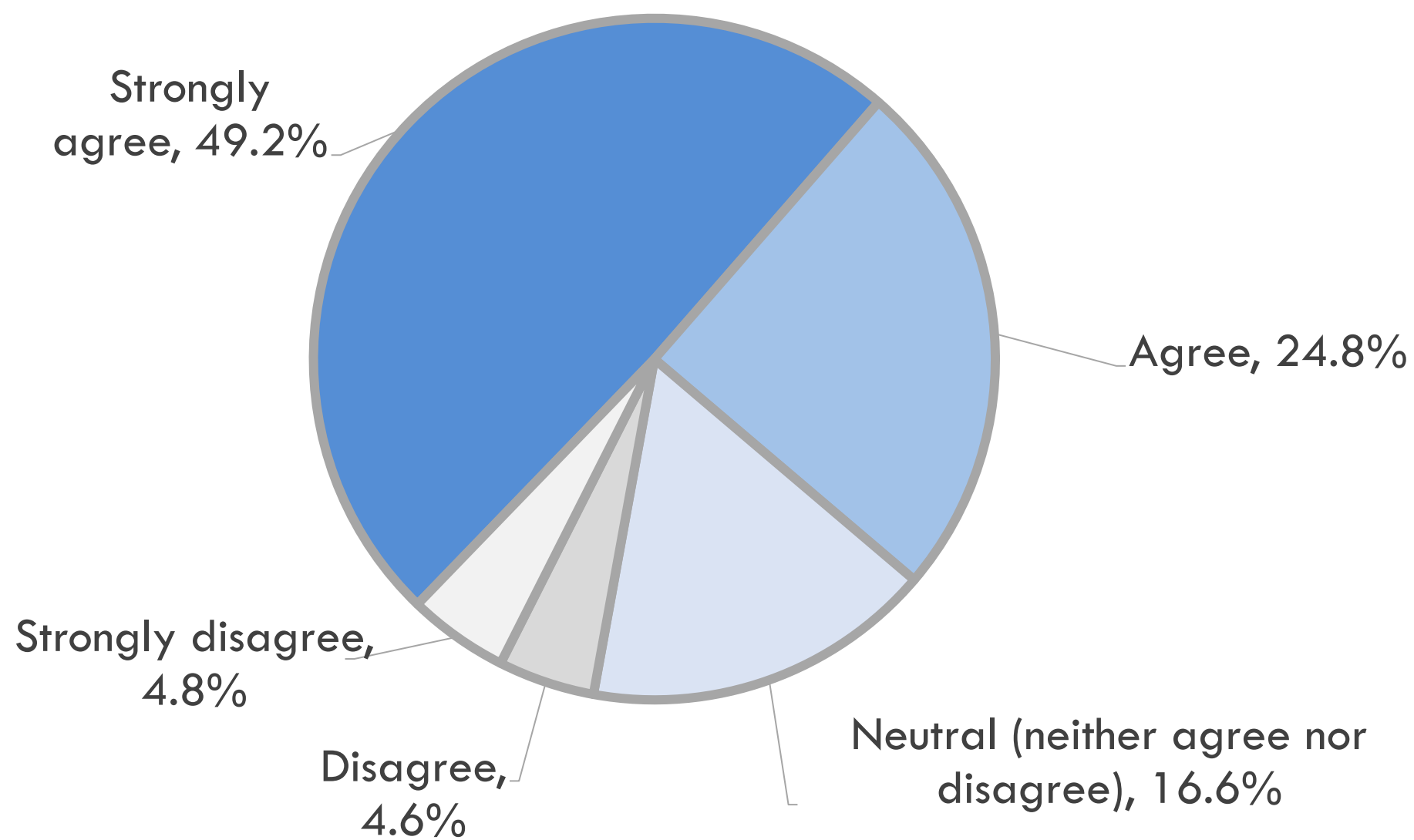
Historical data

Agree or Strongly agree — Disagree or Strongly disagree
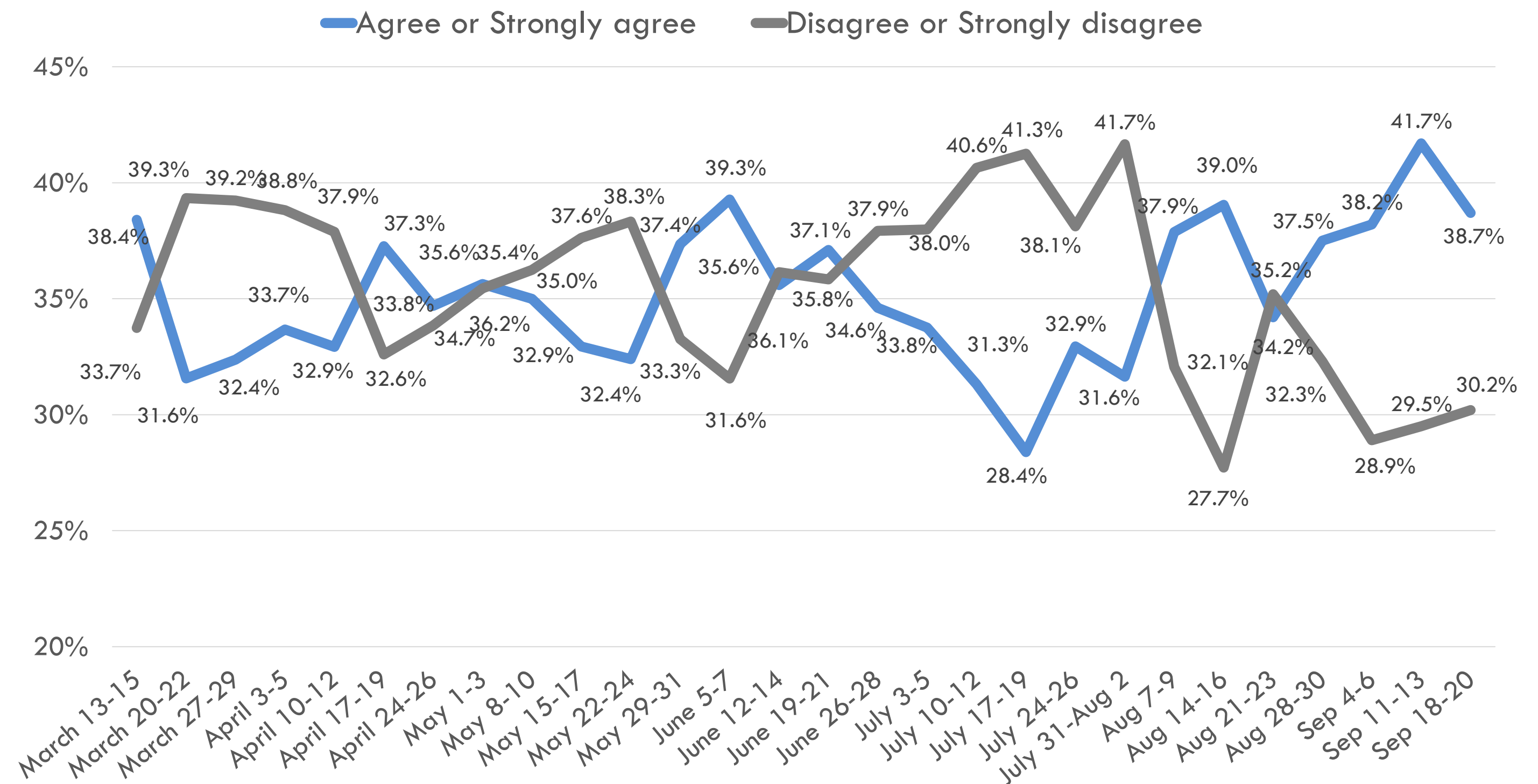
ROAD TRIPS AS A REPLACEMENT FOR AIRLINE TRAVEL

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.
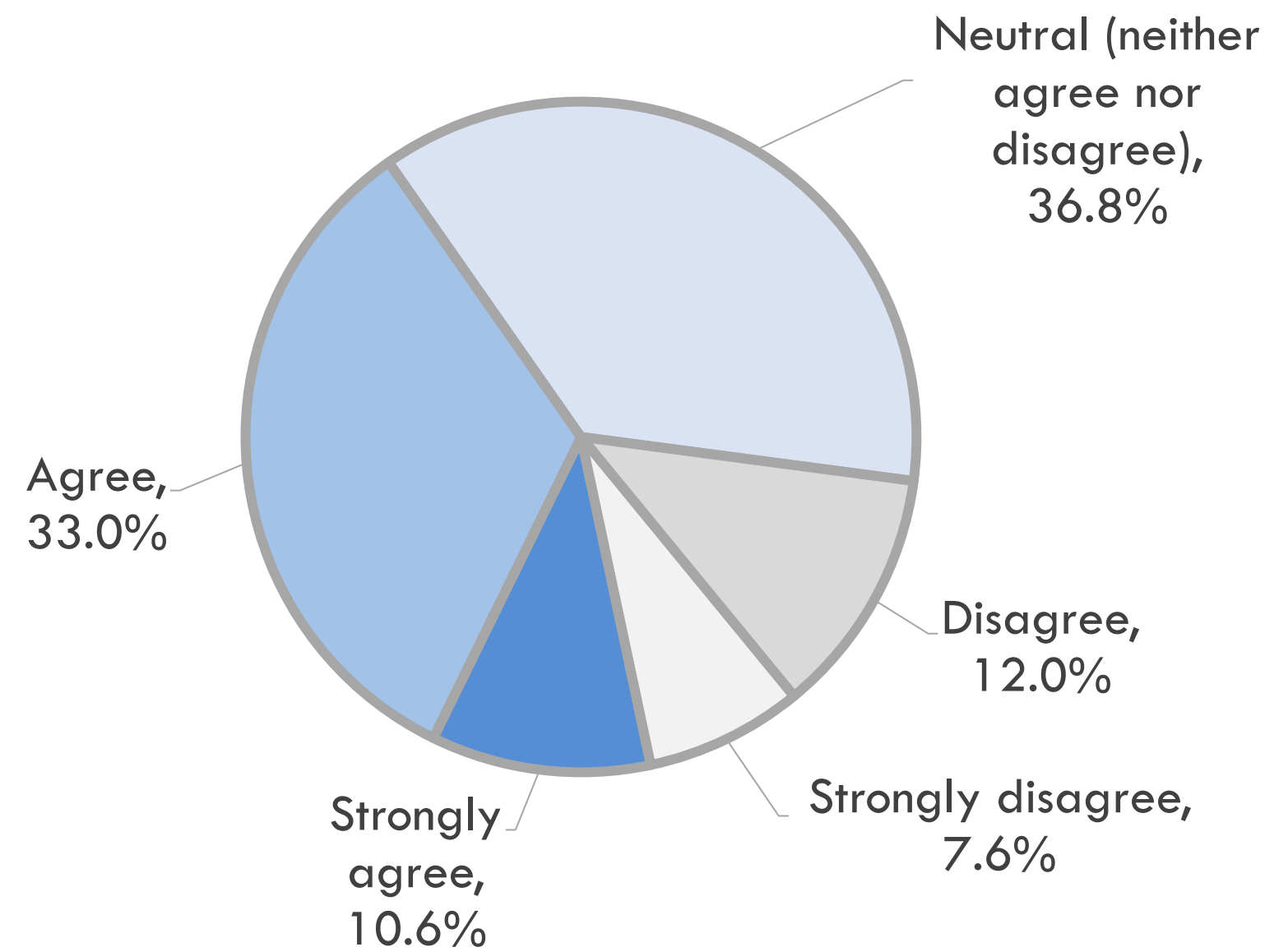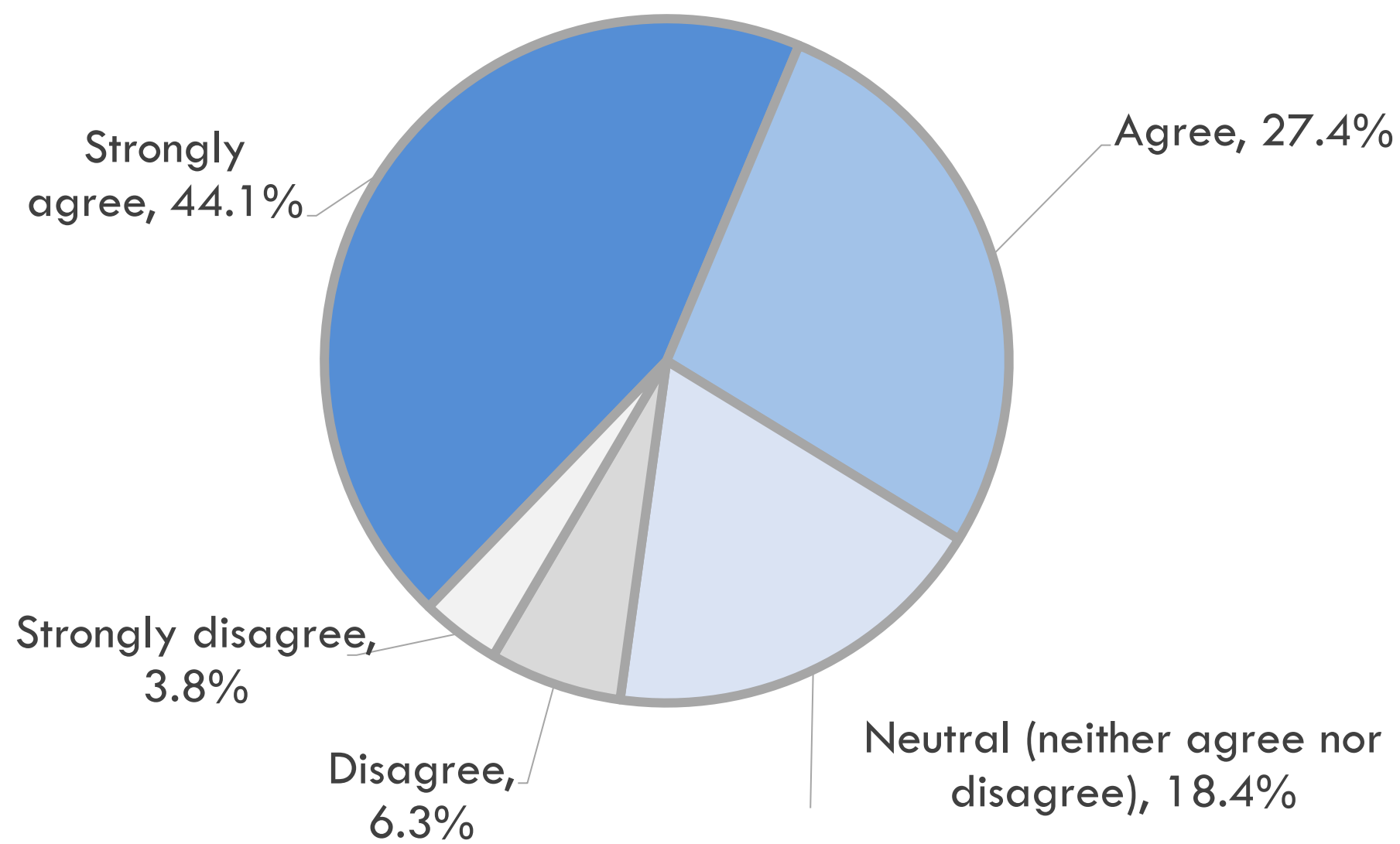

(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)
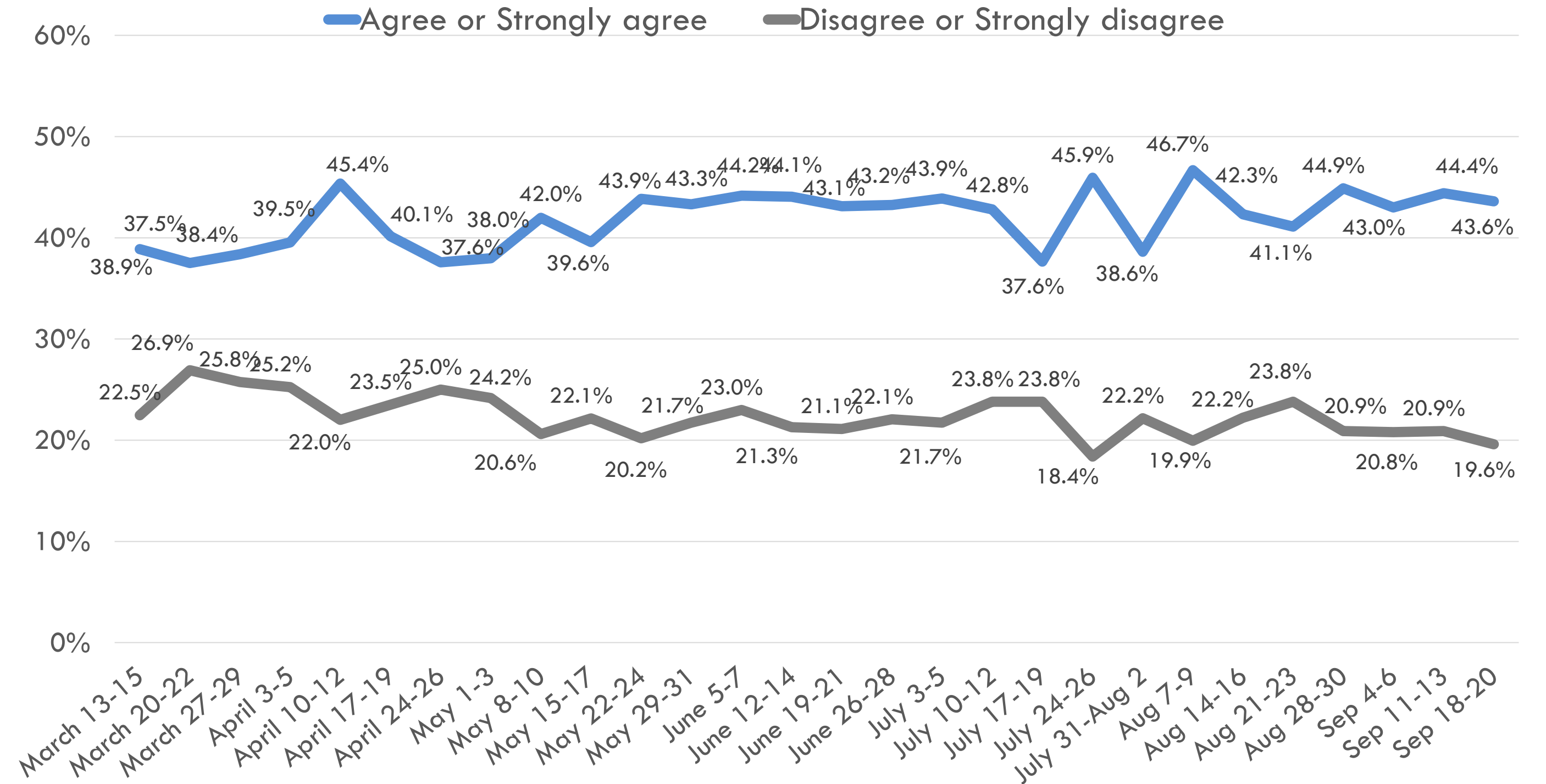
REGIONAL TRIPS AS A REPLACEMENT FOR LONG-HAUL TRAVEL

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).

Pie chart:
- Neutral (neither agree nor disagree), 31.4%
- Agree, 37.6%
- Strongly agree, 13.8%
- Strongly disagree, 7.4%
- Disagree, 9.9%

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)

Historical data

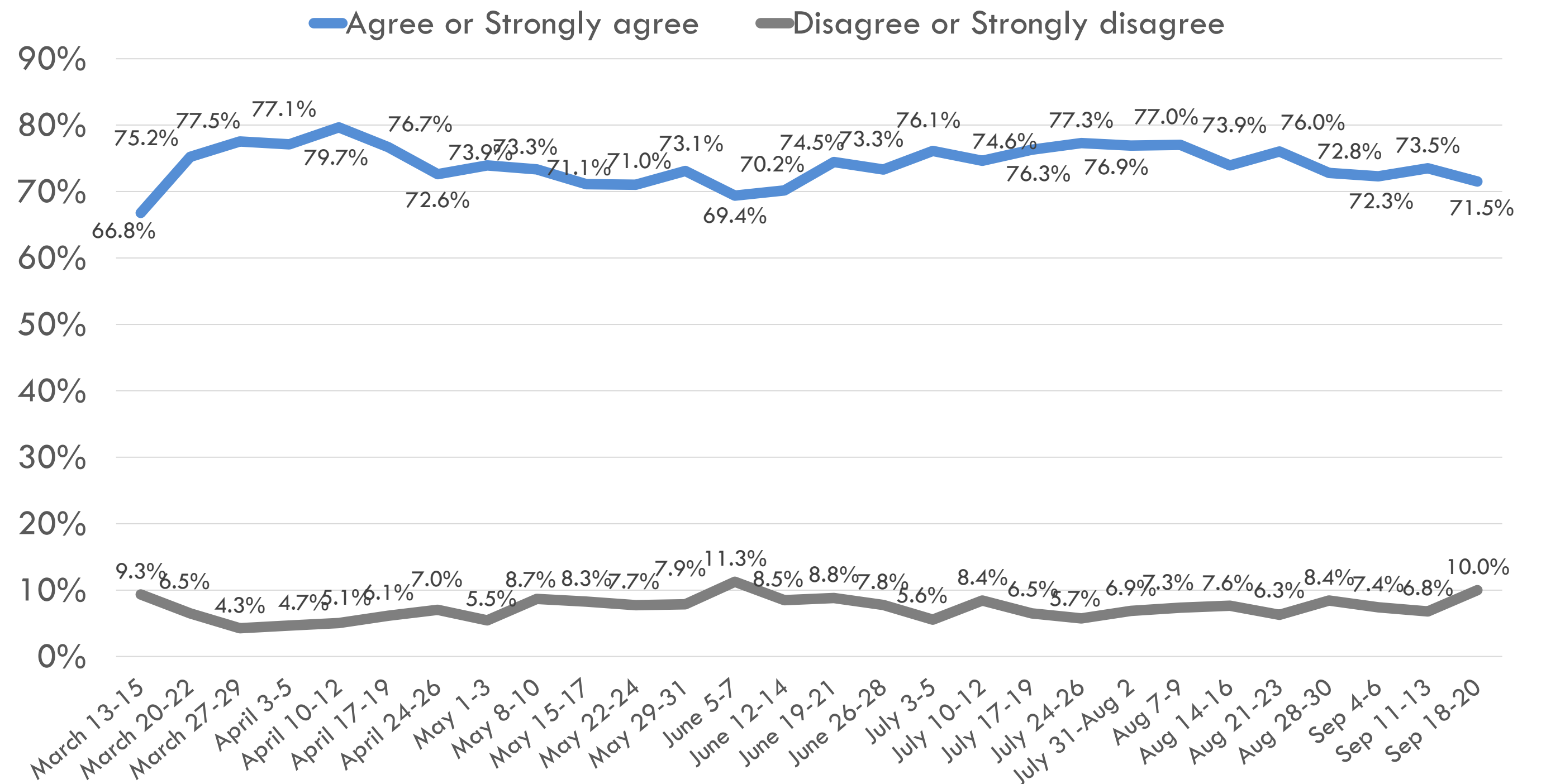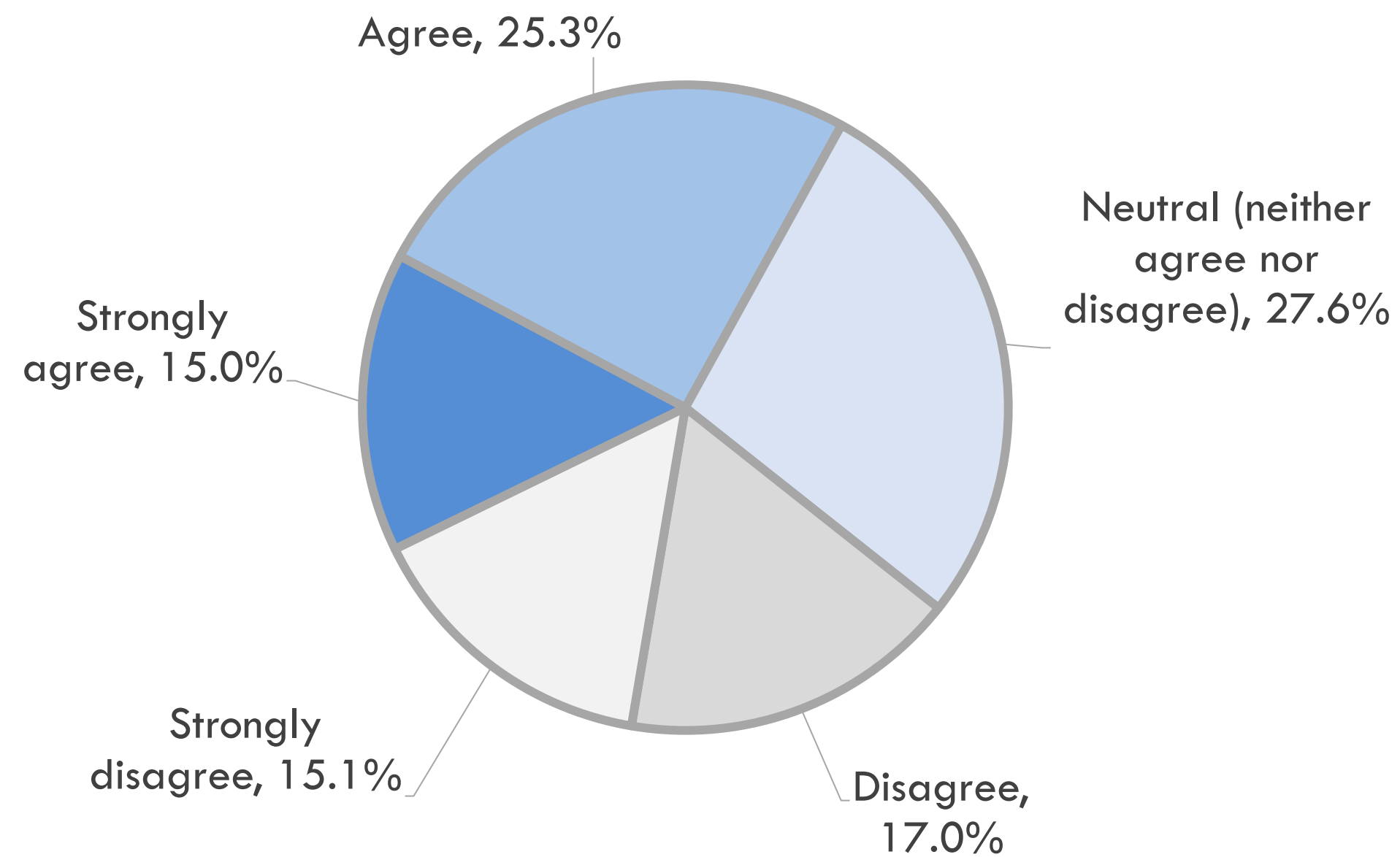Legend: Agree or Strongly agree — Disagree or Strongly disagree

Agree or Strongly agree: 43.4%, 46.3%, 47.7%, 47.2%, 47.8%, 50.8%, 47.4%, 48.8%, 50.3%, 51.5%, 52.8%, 50.8%, 52.8%, 50.3%, 51.7%, 52.4%, 53.1%, 51.1%, 46.7%, 54.6%, 51.4%, 54.2%, 53.4%, 49.4%, 51.7%, 50.8%, 53.5%, 51.4%

Disagree or Strongly disagree: 20.9%, 20.5%, 19.8%, 20.1%, 18.7%, 17.4%, 17.7%, 17.2%, 16.1%, 15.5%, 15.9%, 16.2%, 17.5%, 18.8%, 17.5%, 17.4%, 19.3%, 17.0%, 14.9%, 16.8%, 16.4%, 16.7%, 18.3%, 17.3%, 17.2%, 16.6%, 17.2%

X-axis labels: March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-2

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.

Strongly agree, 49.2%

Agree, 24.8%

Strongly disagree, 4.8%

Disagree, 4.6%

Neutral (neither agree nor disagree), 16.6%

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)
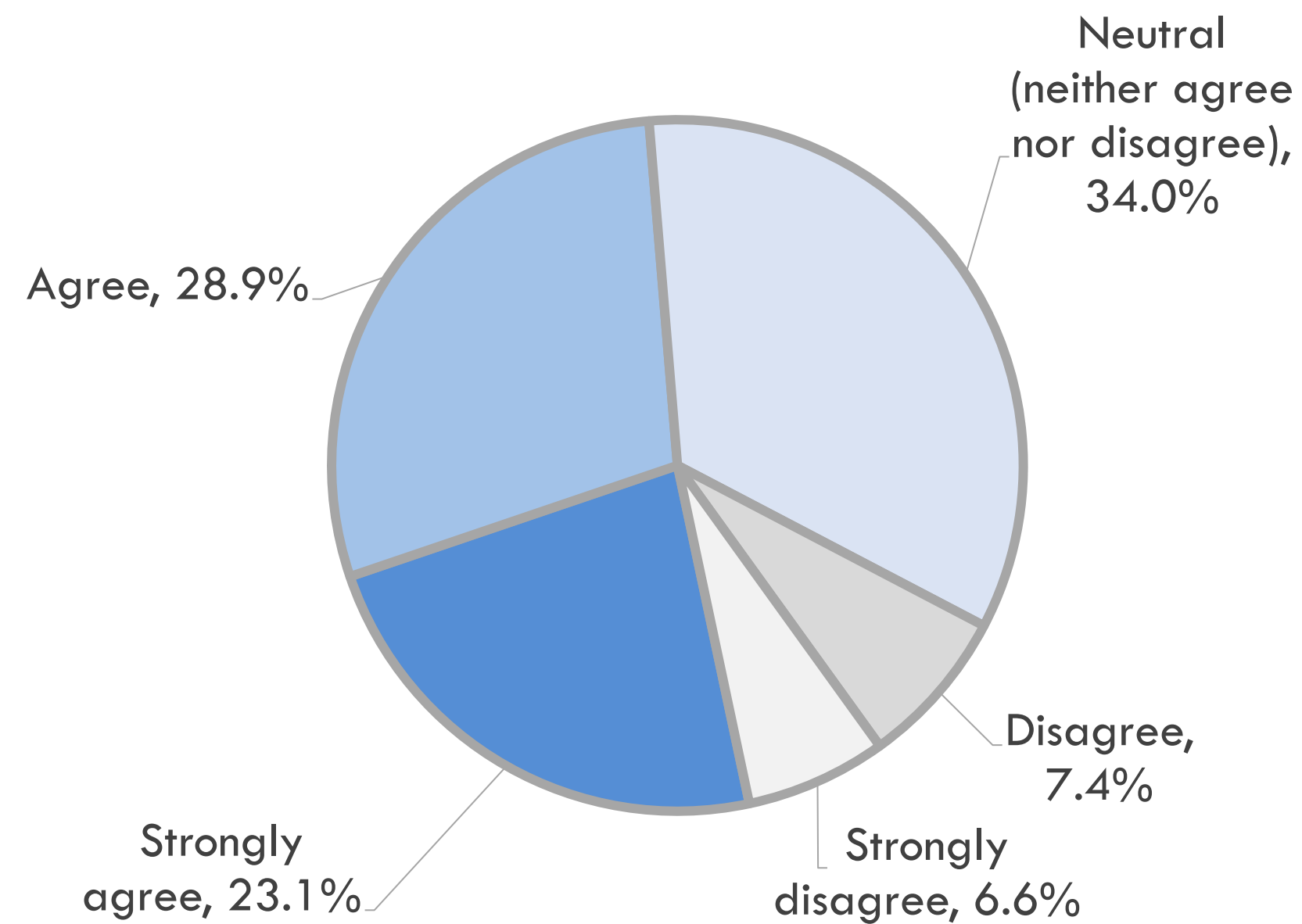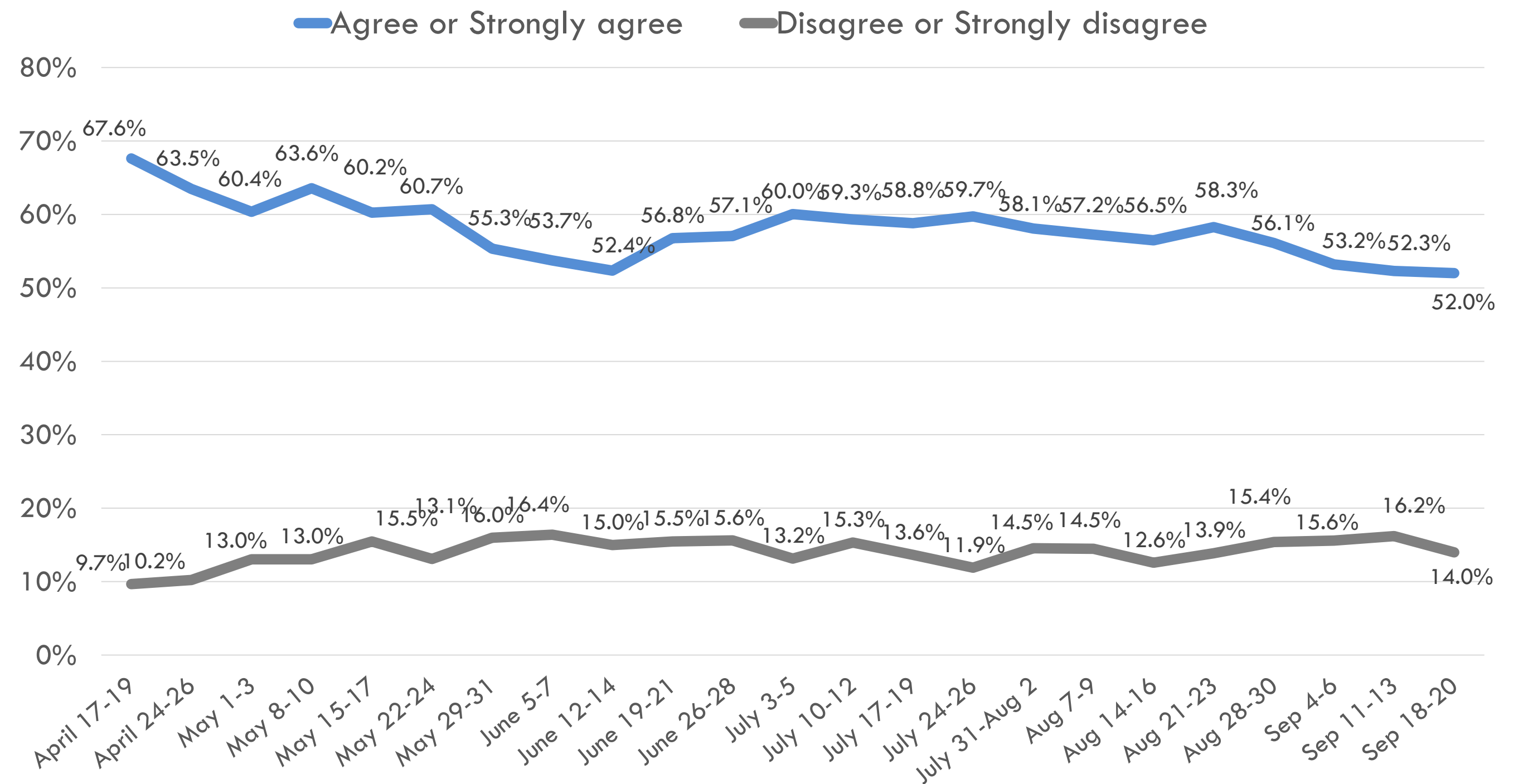
Historical data

— Agree or Strongly agree   — Disagree or Strongly disagree

Agree or Strongly agree: 75.6%, 82.1%, 82.1%, 81.9%, 81.4%, 81.0%, 77.8%, 78.2%, 76.1%, 76.4%, 74.9%, 75.4%, 72.9%, 74.7%, 75.8%, 78.2%, 78.8%, 76.9%, 76.5%, 79.0%, 77.8%, 80.2%, 77.7%, 80.0%, 75.5%, 73.3%, 77.0%, 74.0%

Disagree or Strongly disagree: 8.8%, 4.8%, 4.9%, 6.3%, 6.3%, 5.9%, 6.7%, 6.8%, 8.9%, 8.4%, 9.4%, 8.6%, 9.8%, 9.2%, 9.1%, 7.3%, 7.6%, 8.4%, 7.6%, 7.0%, 7.2%, 8.0%, 6.5%, 7.5%, 7.1%, 8.4%, 8.2%, 9.4%

March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

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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.

Strongly agree, 44.1%

Agree, 27.4%

Strongly disagree, 3.8%

Disagree, 6.3%

Neutral (neither agree nor disagree), 18.4%

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)
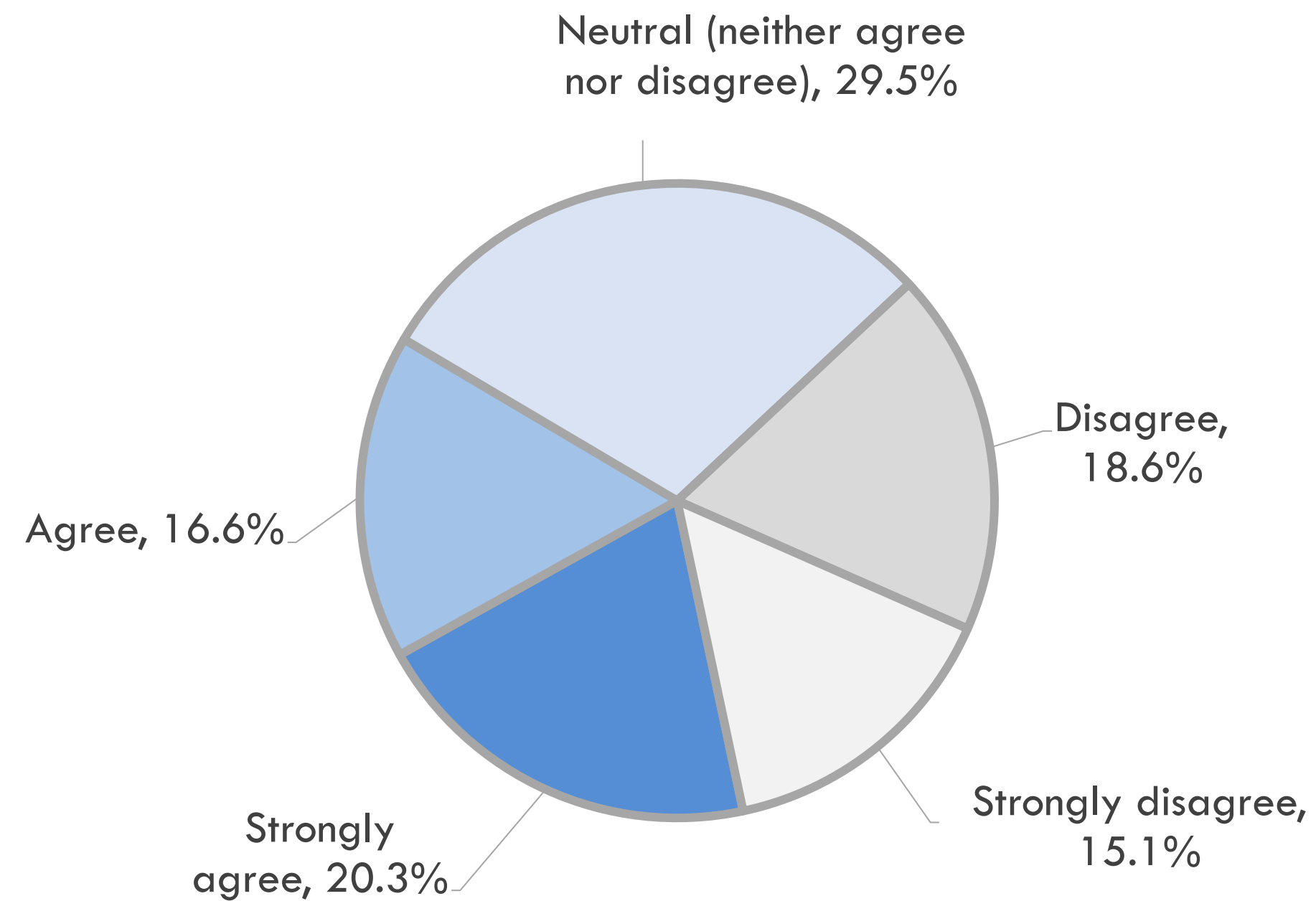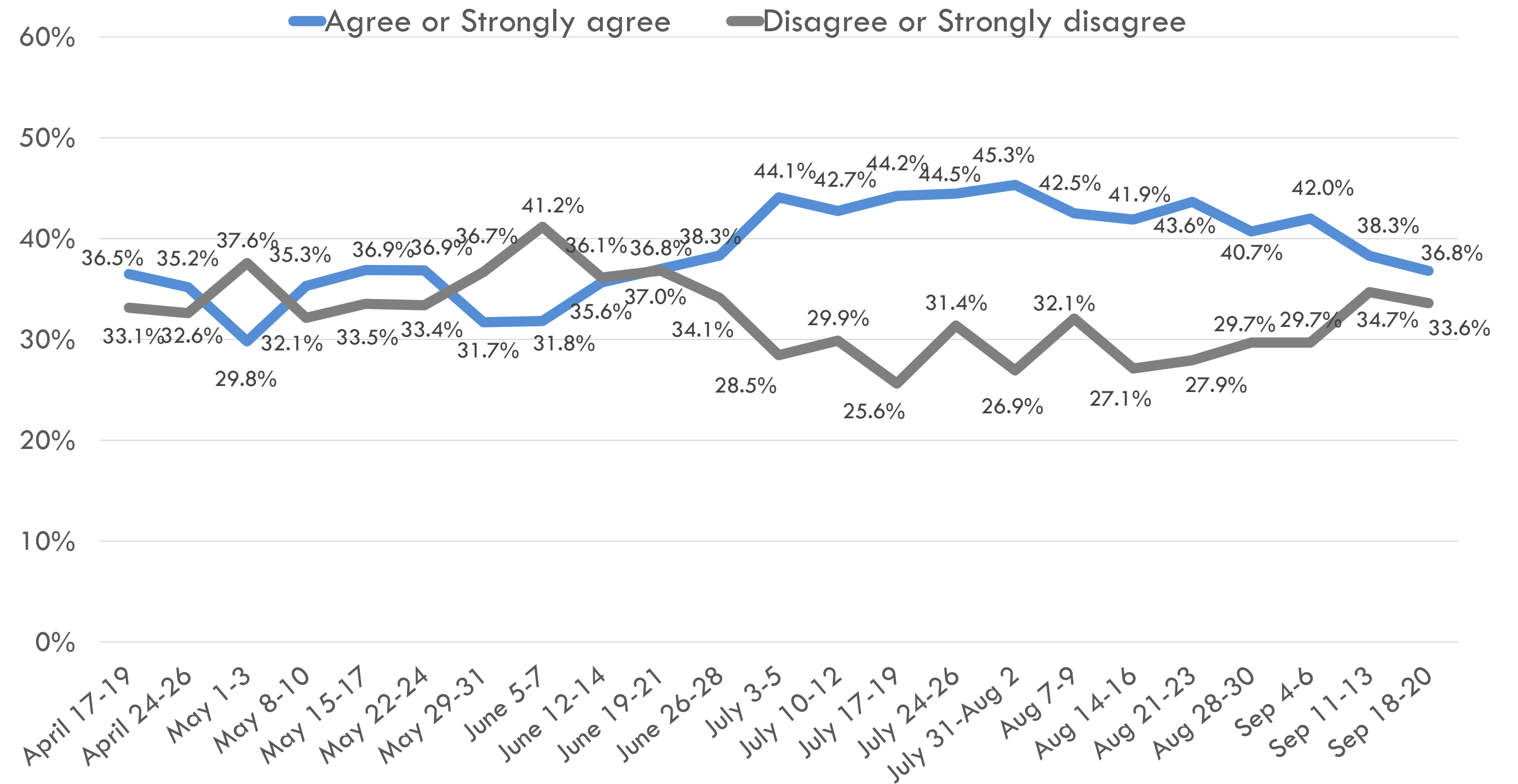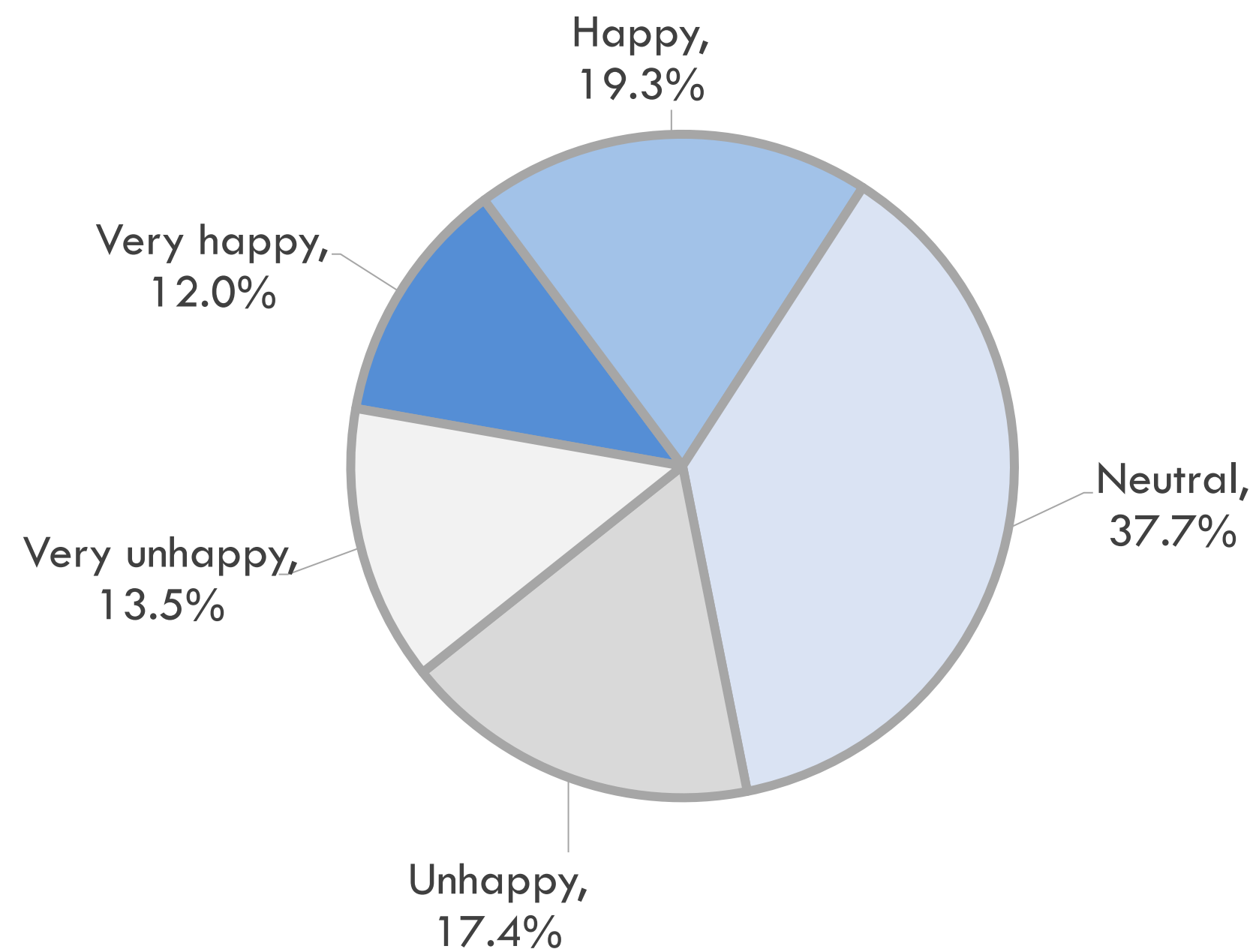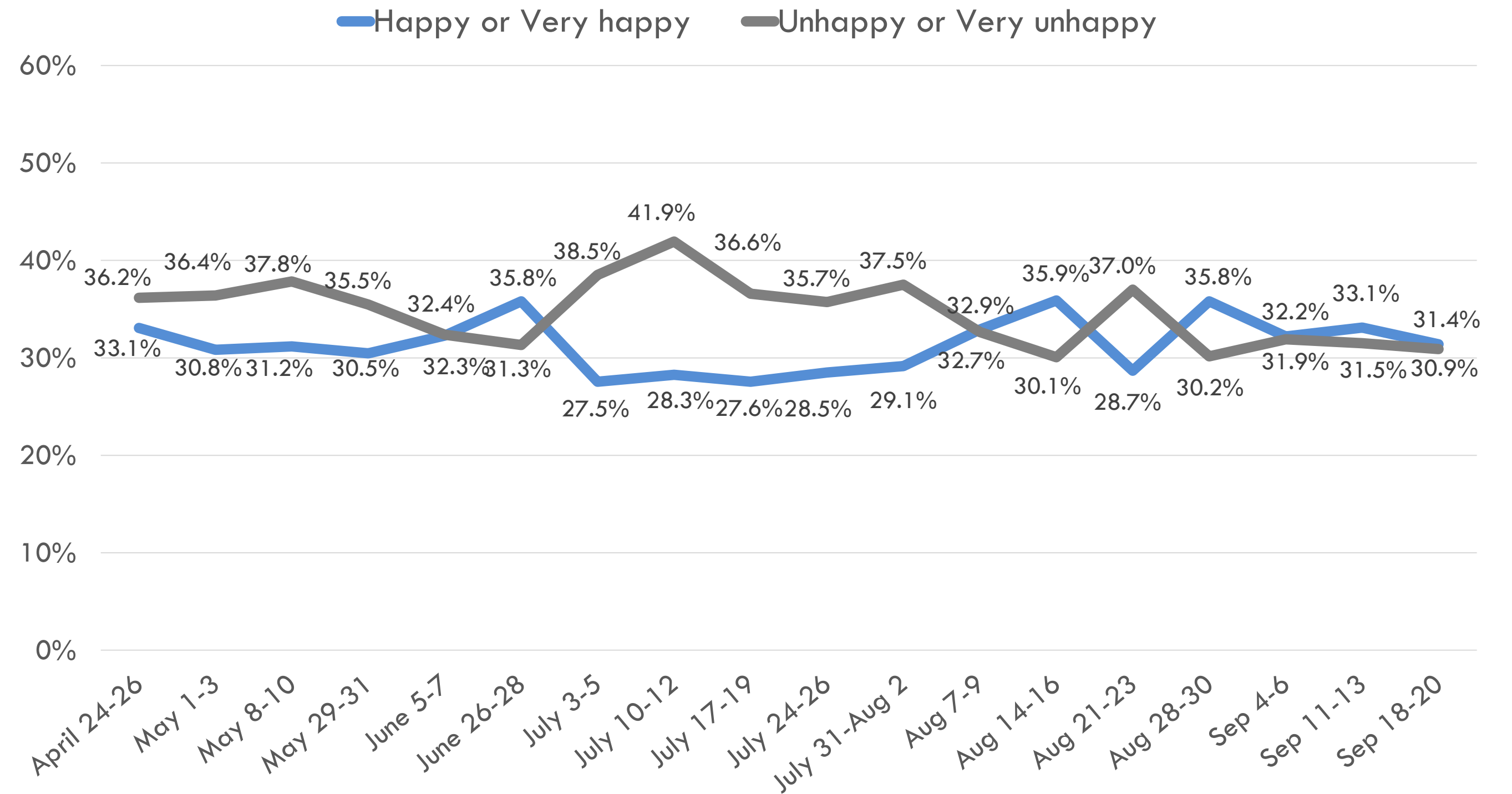
Historical data

— Agree or Strongly agree — Disagree or Strongly disagree

66.8%, 75.2%, 77.5%, 77.1%, 79.7%, 76.7%, 72.6%, 73.9%, 73.3%, 71.1%, 71.0%, 73.1%, 69.4%, 70.2%, 74.5%, 73.3%, 76.1%, 76.3%, 74.6%, 77.3%, 76.9%, 77.0%, 73.9%, 76.0%, 72.8%, 72.3%, 73.5%, 71.5%

9.3%, 6.5%, 4.3%, 4.7%, 5.1%, 6.1%, 7.0%, 5.5%, 8.7%, 8.3%, 7.7%, 7.9%, 11.3%, 8.5%, 8.8%, 7.8%, 5.6%, 8.4%, 6.5%, 5.7%, 6.9%, 7.3%, 7.6%, 6.3%, 8.4%, 7.4%, 6.8%, 10.0%

March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

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COMFORT ENJOYING HOME COMMUNITY

How much do you agree with the following statement?

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

Pie chart:
- Agree, 25.3%
- Neutral (neither agree nor disagree), 27.6%
- Disagree, 17.0%
- Strongly disagree, 15.1%
- Strongly agree, 15.0%

Historical data

Line chart legend: Agree or Strongly agree / Disagree or Strongly disagree

(Base: Waves 1-28. 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, 1,205 and 1,200 completed surveys.)

Destination Analysts
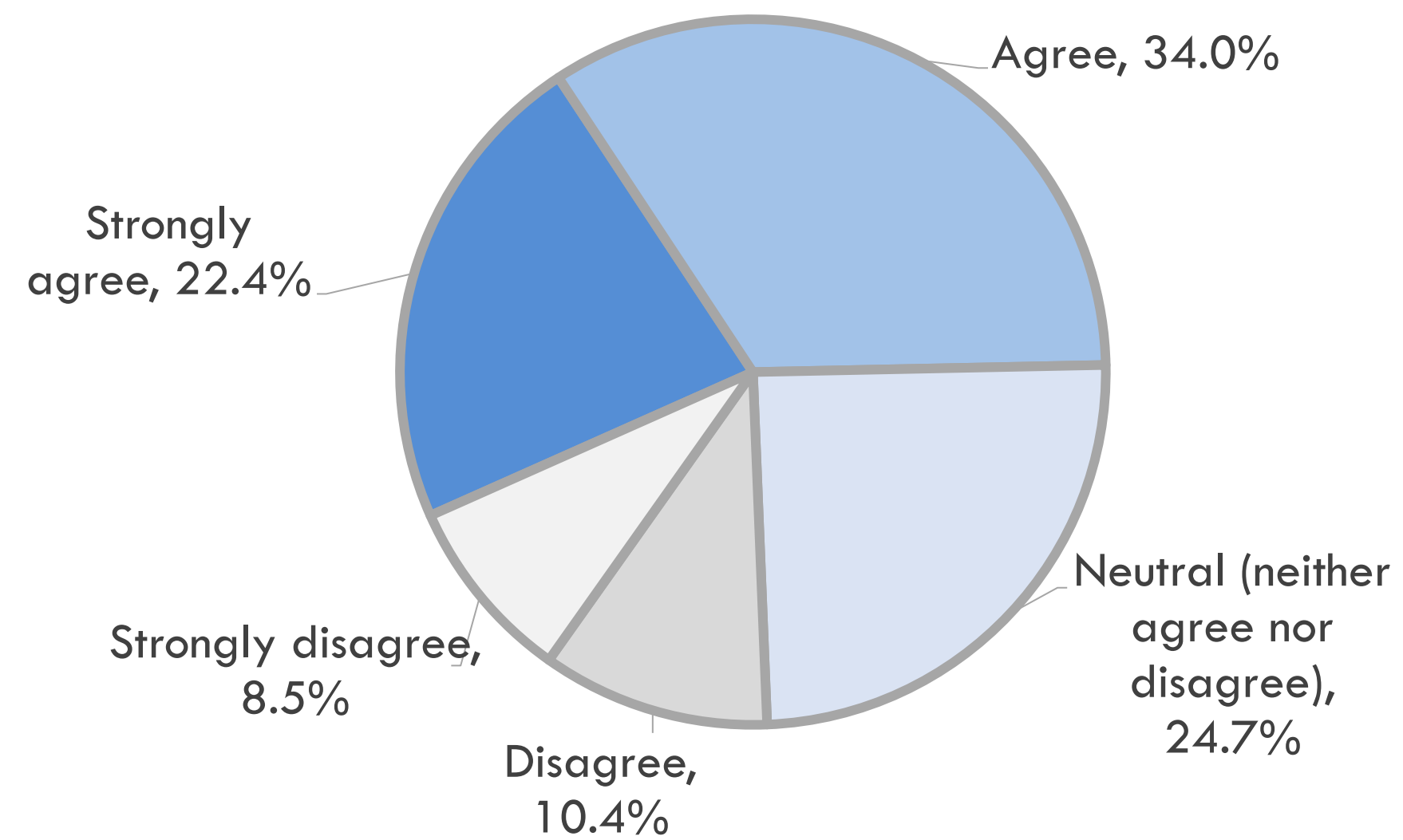DO YOUR RESEARCH
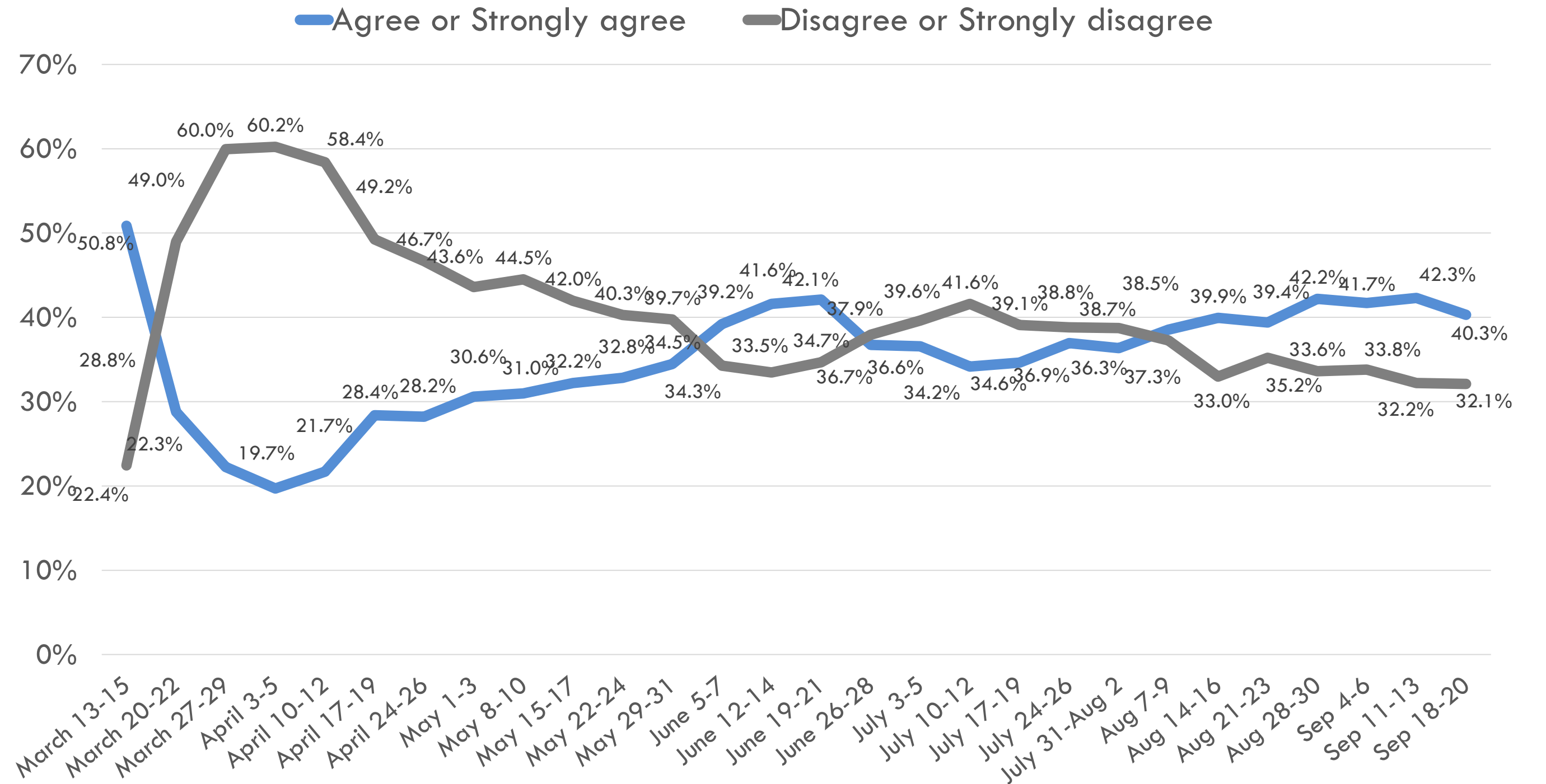
TRAVELERS IN COMMUNITY ARE UNWANTED

How much do you agree with the following statement?

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

Neutral (neither agree nor disagree), 34.0%

Agree, 28.9%

Strongly agree, 23.1%

Strongly disagree, 6.6%

Disagree, 7.4%

Historical data

Agree or Strongly agree — Disagree or Strongly disagree

Agree or Strongly agree: 67.6%, 63.5%, 60.4%, 63.6%, 60.2%, 60.7%, 55.3%, 53.7%, 52.4%, 56.8%, 57.1%, 60.0%, 59.3%, 58.8%, 59.7%, 58.1%, 57.2%, 56.5%, 58.3%, 56.1%, 53.2%, 52.3%, 52.0%

Disagree or Strongly disagree: 9.7%, 10.2%, 13.0%, 13.0%, 15.5%, 13.1%, 16.0%, 16.4%, 15.0%, 15.5%, 15.6%, 13.2%, 15.3%, 13.6%, 11.9%, 14.5%, 14.5%, 12.6%, 13.9%, 15.4%, 15.6%, 16.2%, 14.0%

April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, 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, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

(Base: Waves 6-28. 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, 1,205 and 1,200 completed survey.

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WON'T TRAVEL WITHOUT VACCINE

How much do you agree with the following statement?

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

Neutral (neither agree nor disagree), 29.5%

Disagree, 18.6%

Strongly disagree, 15.1%

Strongly agree, 20.3%

Agree, 16.6%

(Base: Waves 6-28. 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, 1,205 and 1,200 completed surveys.)

Historical data

Agree or Strongly agree   Disagree or Strongly disagree

Destination Analysts
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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?

Happy, 19.3%

Very happy, 12.0%

Very unhappy, 13.5%

Unhappy, 17.4%

Neutral, 37.7%

(Base: Waves 7-9, 12-13 and 16-28. 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, 1,205 and 1,200 completed surveys.)

Historical data

Happy or Very happy — Unhappy or Very unhappy

33.1% 30.8% 31.2% 30.5% 32.3% 35.8% 27.5% 28.3% 27.6% 28.5% 29.1% 32.7% 35.9% 28.7% 35.8% 32.2% 33.1% 31.4%

36.2% 36.4% 37.8% 35.5% 32.4% 31.3% 38.5% 41.9% 36.6% 35.7% 37.5% 32.9% 37.0% 30.1% 30.2% 31.9% 31.5% 30.9%

April 24-26, May 1-3, May 8-10, May 29-31, June 5-7, June 26-28, July 3-5, July 10-12, July 17-19, July 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20

HAPPINESS PLANNING A VACATION WITHIN NEXT 6 MONTHS

How much do you agree with the following statement?

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

Agree, 34.0%

Strongly agree, 22.4%

Strongly disagree, 8.5%

Disagree, 10.4%

Neutral (neither agree nor disagree), 24.7%

(Base: Waves 22-28. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Historical data

— Agree or Strongly agree   — Disagree or Strongly disagree

57.3%   54.5%   54.4%   55.0%   54.7%   58.6%   56.3%

19.0%   16.6%   22.0%   18.7%   18.0%   18.5%   19.0%

Aug 7-9   Aug 14-16   Aug 21-23   Aug 28-30   Sep 4-6   Sep 11-13   Sep 18-20

Destination Analysts
DO YOUR RESEARCH
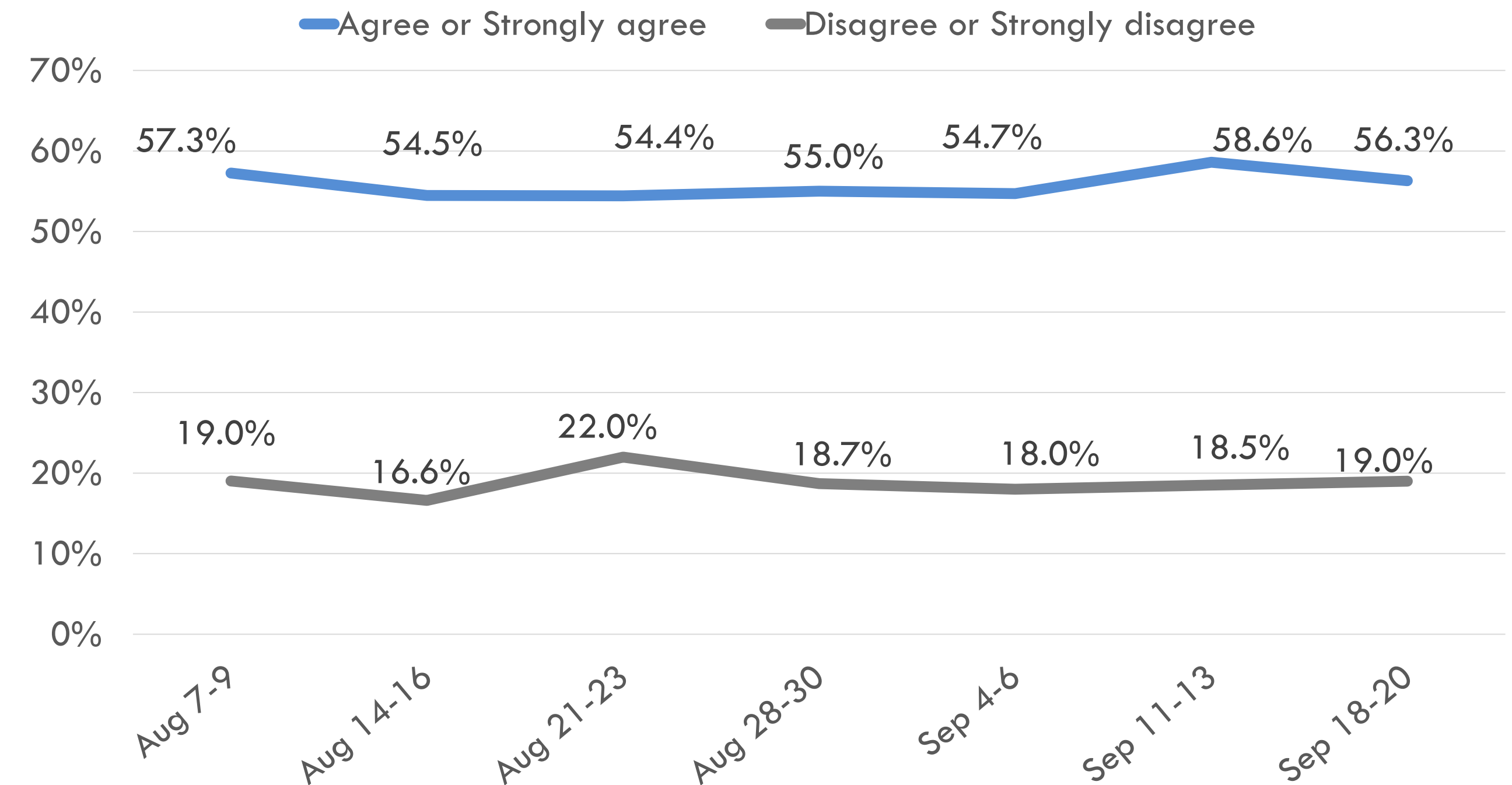
HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS

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.

Agree, 31.8%

Strongly agree, 21.8%

Strongly disagree, 9.7%

Disagree, 10.9%

Neutral (neither agree nor disagree), 25.9%

(Base: Waves 22-28. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Historical data

— Agree or Strongly agree   — Disagree or Strongly disagree

56.6%   52.9%   51.8%   54.8%   54.5%   58.4%   53.6%

19.7%   15.9%   23.1%   19.3%   18.0%   17.8%   20.6%

Aug 7-9   Aug 14-16   Aug 21-23   Aug 28-30   Sep 4-6   Sep 11-13   Sep 18-20

Destination Analysts
DO YOUR RESEARCH
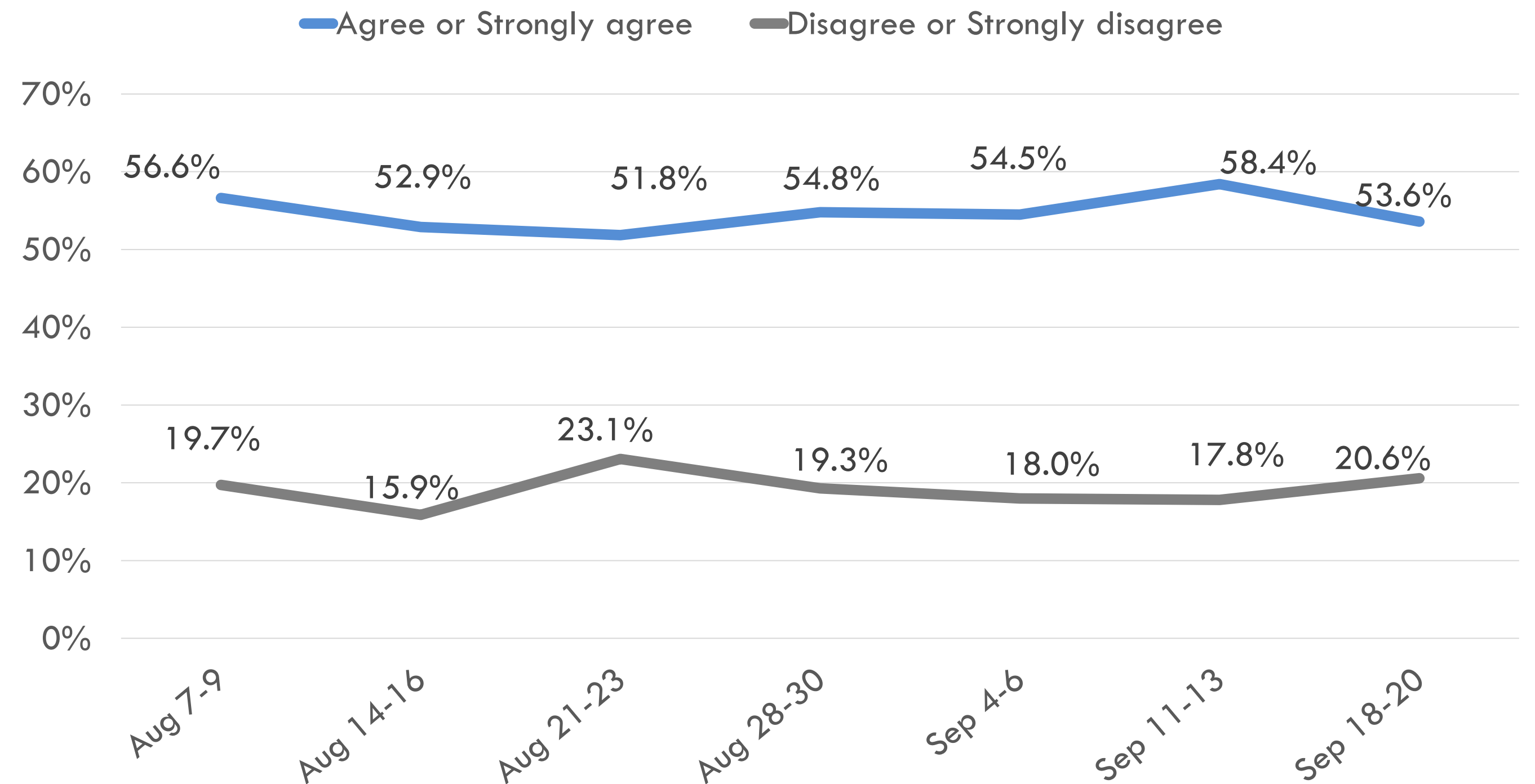
CONFIDENCE IN TRAVELING SAFELY

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

Confident, 19.9%

Very confident, 10.6%

Somewhat confident, 24.4%

Not at all confident, 19.5%

Not very confident, 25.7%

Historical data

Confident or Very confident — Not very or Not at all confident

	Aug 21-23	Aug 28-30	Sep 4-6	Sep 11-13	Sep 18-20
Not very or Not at all confident	36.9%	46.0%	46.3%	45.8%	45.1%
Confident or Very confident	34.2%	29.7%	28.4%	30.2%	30.5%
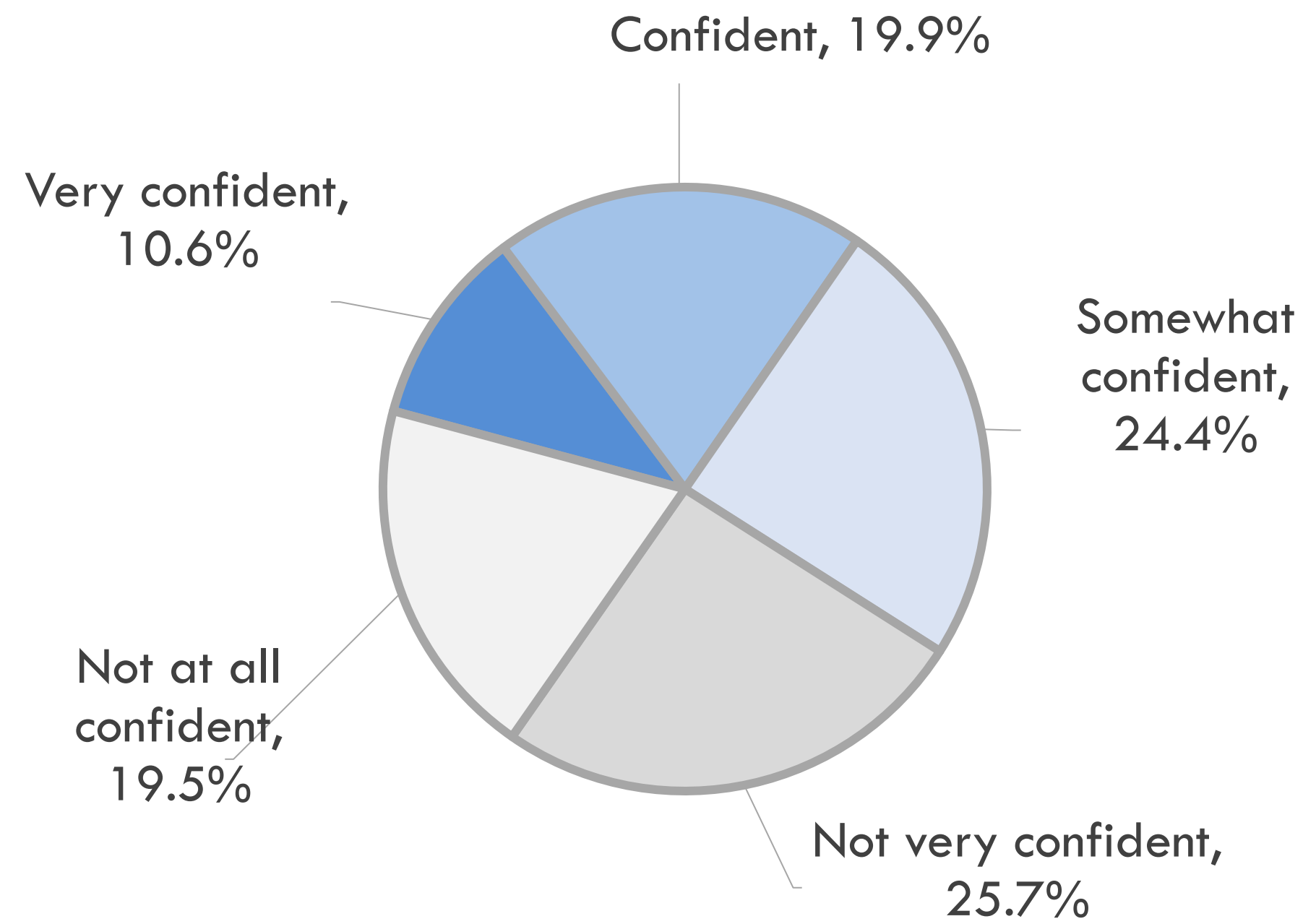
(Base: Wave 24-28 data. All respondents, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Destination Analysts
DO YOUR RESEARCH
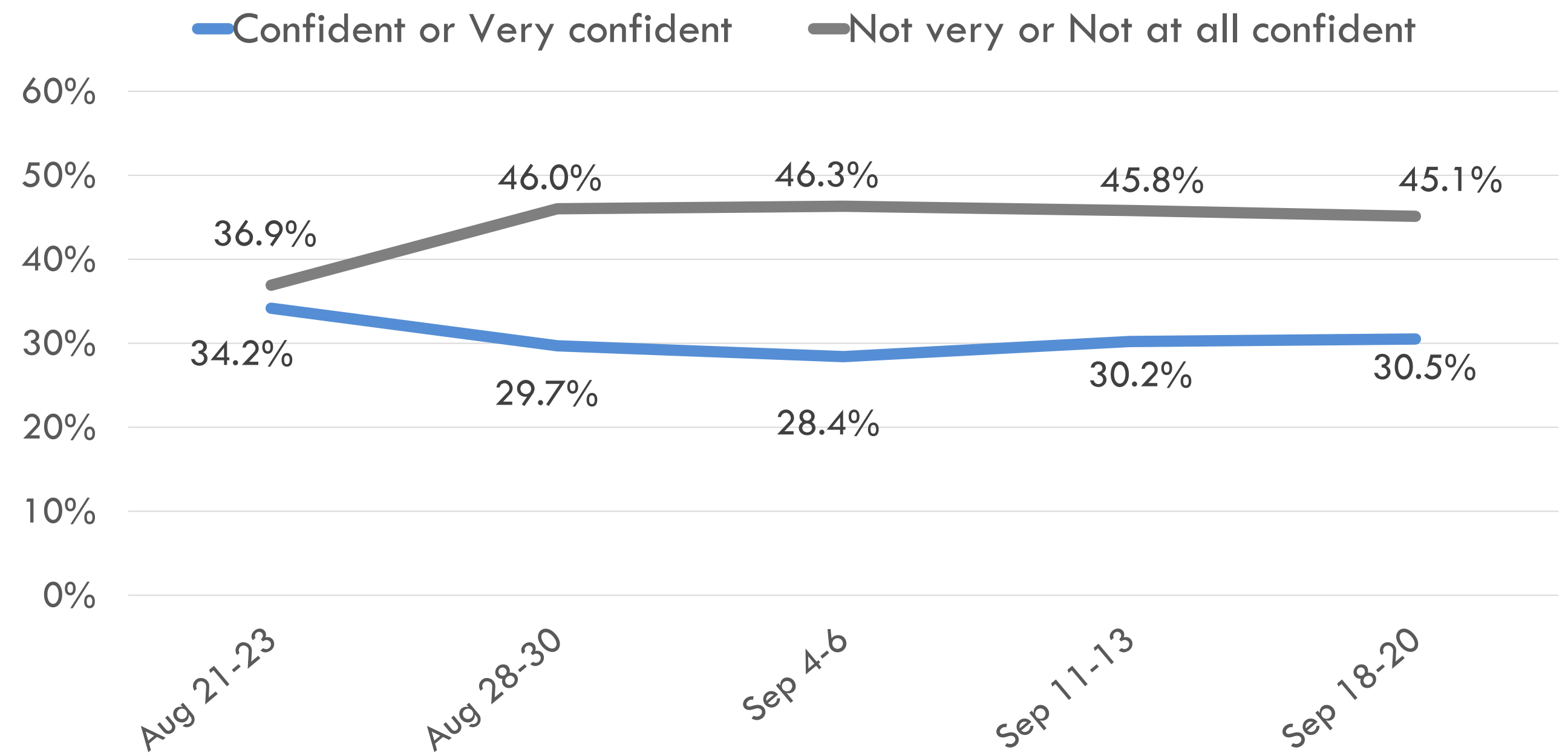
INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

How much do you agree with the following statement?

Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Strongly agree — 25.8%

Agree — 31.0%

Neutral (neither agree nor disagree) — 20.9%

Disagree — 14.1%

Strongly disagree — 8.2%

56.8% — 60.5% July 26th

22.3% — 19.2% July 26th
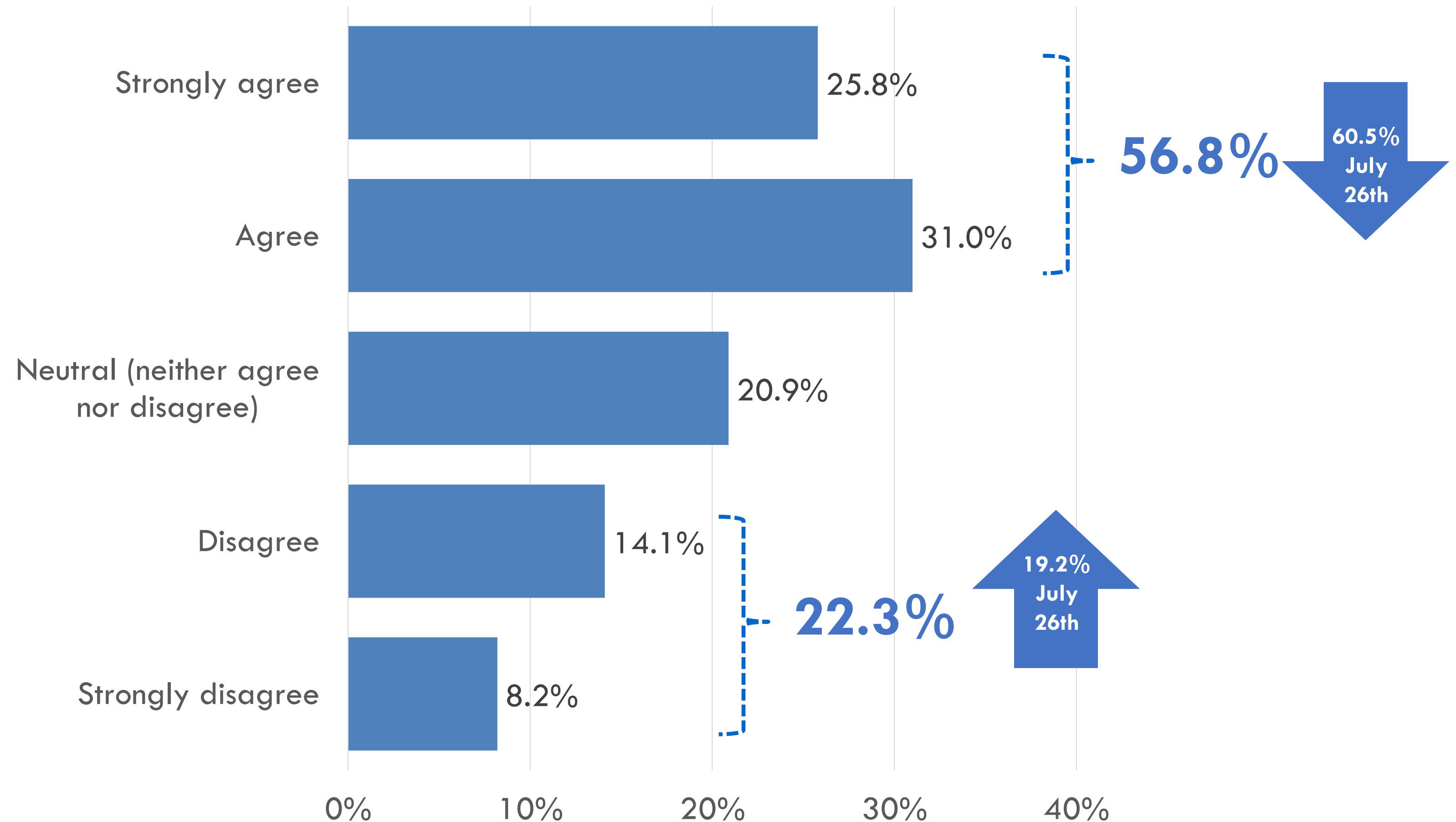
LOSS OF INTEREST IN TRAVEL

How much do you agree with the following statement?

Statement: I have lost my interest in/taste for traveling for the time being.

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected Sep 18-20, 2020)

Strongly agree — 18.7%

Agree — 24.4%

Neutral (neither agree nor disagree) — 24.5%

Disagree — 16.5%

Strongly disagree — 15.9%

43.1%

49.5% July 26th

32.4%

27.1% July 26th

Destination Analysts
DO YOUR RESEARCH
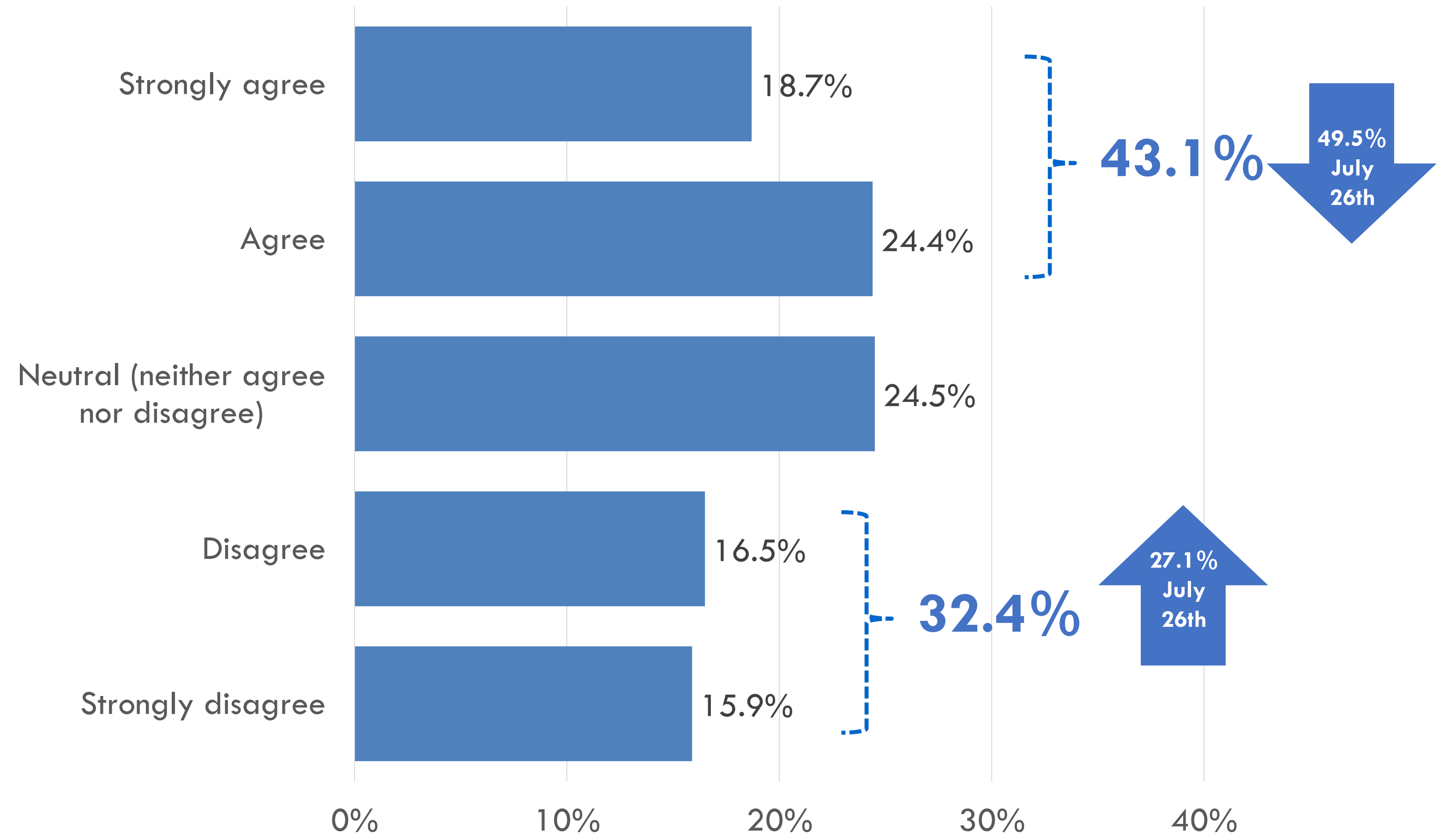
Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 21st

What is a Predictive Index?

Indexing is the practice of compiling data into one single metric.
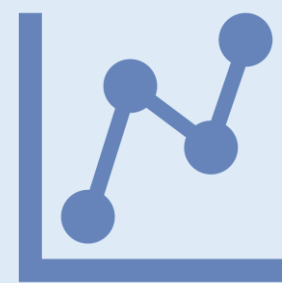
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.

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

$$\left[\begin{array}{c} \text{Concern for} \\ \text{Personal Health} \\ + \\ \text{Concern for} \\ \text{Personal Finances} \end{array} \right] \times \left[\begin{array}{c} \text{Openness to} \\ \text{Messaging} \\ + \\ \text{Excitement to} \\ \text{Travel Now} \end{array} \right]$$
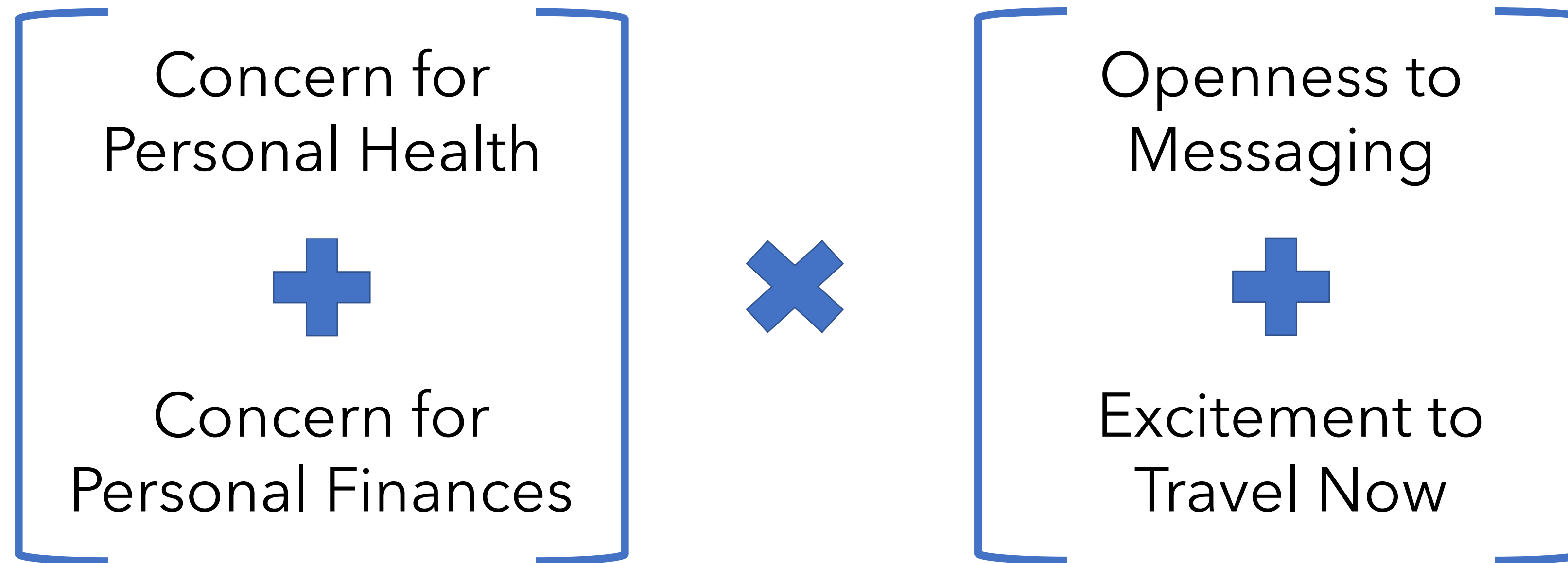
*Normalized to a 100pt scale

Healthy Travel Outlook

Travel Outlook

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Ready to Travel

Potentially Marketable

Not Ready to Travel

Segments above 25 this week:
- Campground Travelers
- Rural Residence
- Cruise Travelers

Legend:
- Total
- Millennials or younger
- Gen X
- Boomer or older
- WEST
- MIDWEST
- NORTHEAST
- SOUTH
- International Travelers
- Air Travelers
- Cruise Travelers
- Leisure Travelers
- VFR Travelers
- Business Travelers
- Convention Travelers
- Female
- Male
- Affluent - Over $125K
- $80K - $125K
- Under $80K
- City Travelers
- Beach Travelers
- US National Parks Travelers
- Mountain Travelers
- Dessert Travelers
- Suburban area
- Large city (urban area)
- Rural area
- Luxury Hotel
- Non-Luxury Hotel
- Peer-to-peer lodging
- Campground or RV park
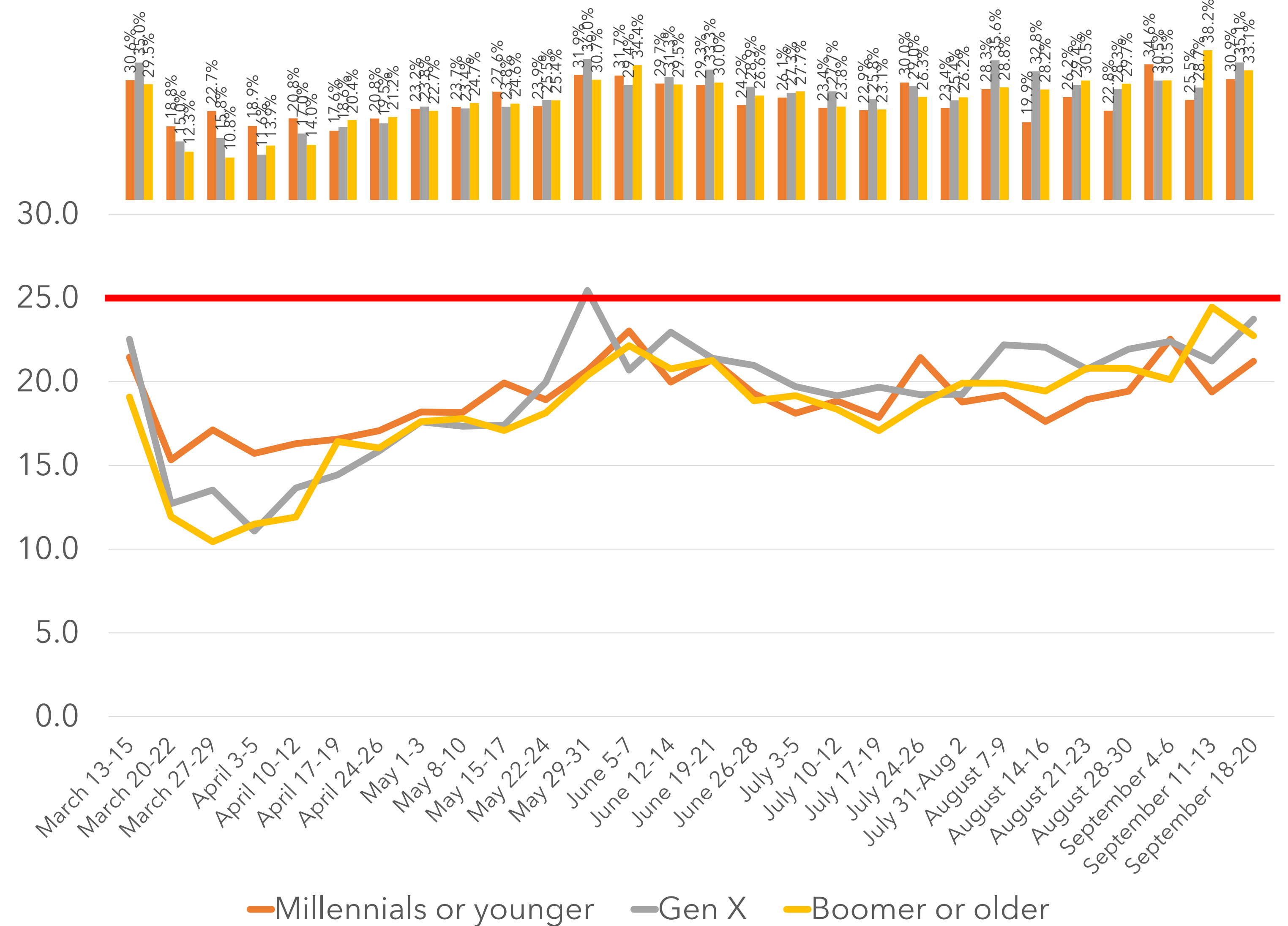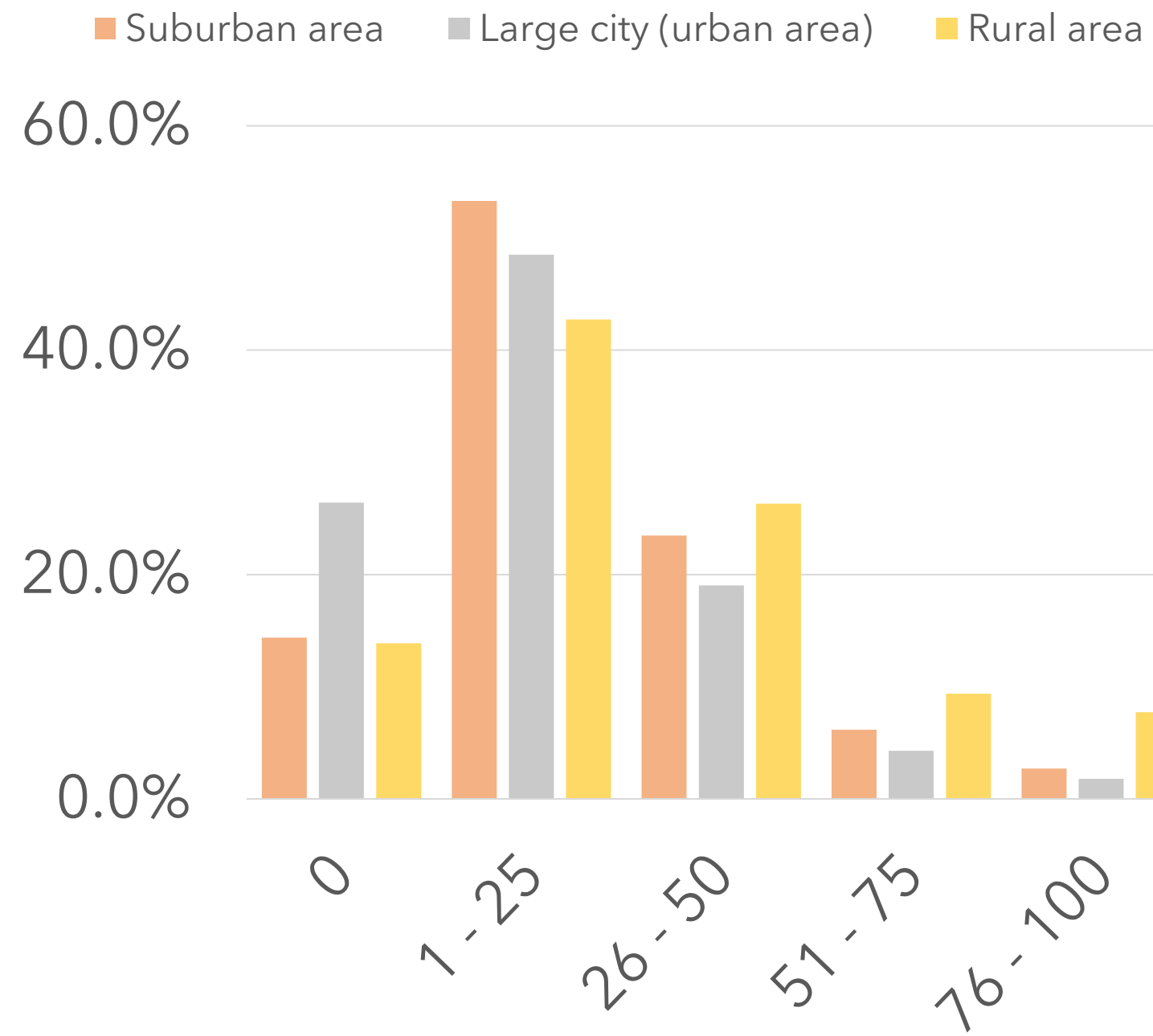
X-axis labels: March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, June 5-7, June 12-14, June 19-21, June 26-28, July 3-5, July 10-12, July 17-19, July 24-26, July 31-Aug 2, August 7-9, August 14-16, August 21-23, August 28-30, September 4-6, September 11-13, September 18-20

Y-axis: 0.0, 25.0, 50.0, 75.0, 100.0

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

Percent Potentially Marketable
(Index Above 25)

Residence Type

Percent Potentially Marketable
(Index Above 25)

PAGE 80

Lodging Preference

Percent Potentially Marketable
(Index Above 25)

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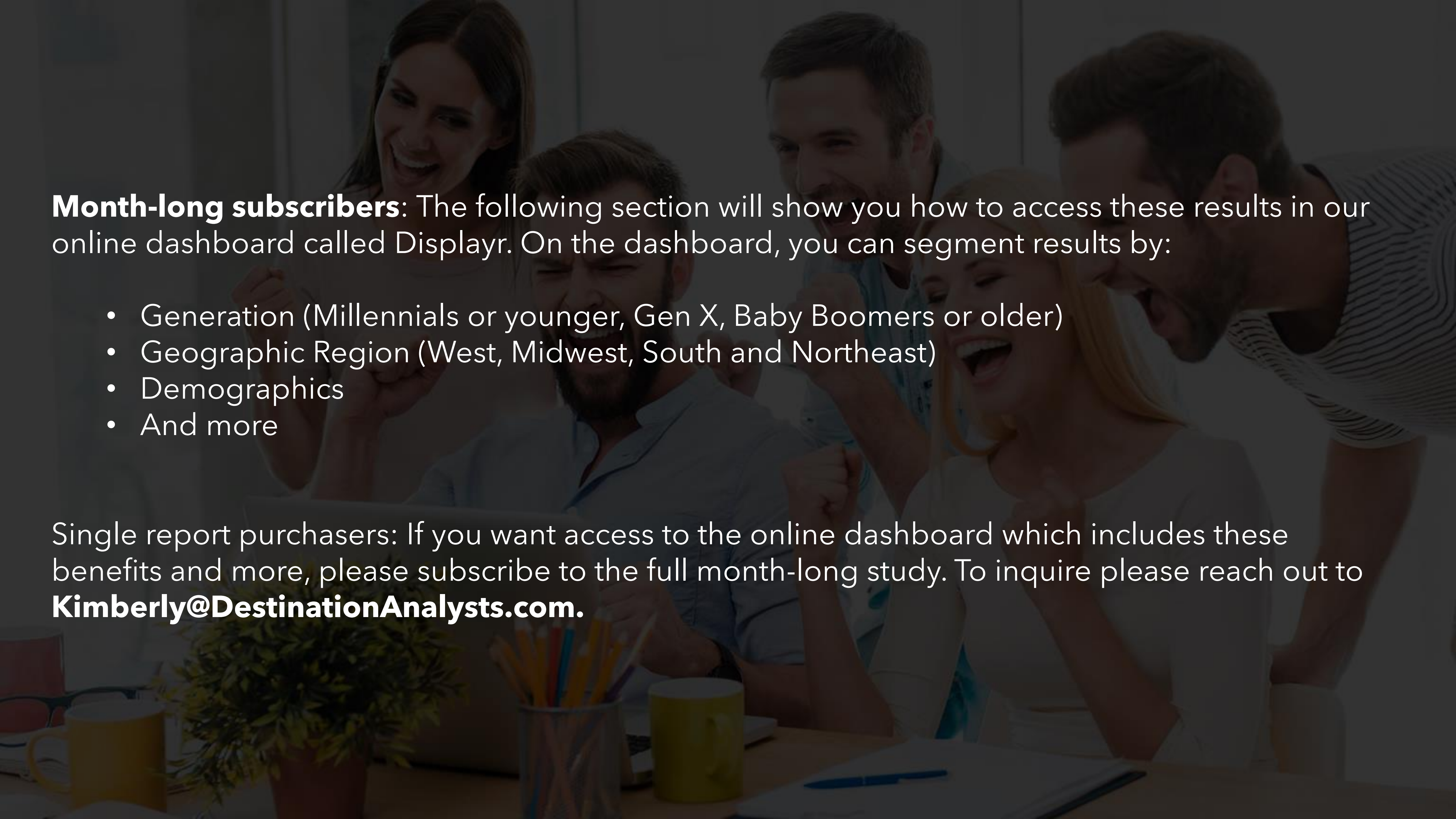
Month-long subscribers: The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

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

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

HOW TO USE DISPLYR

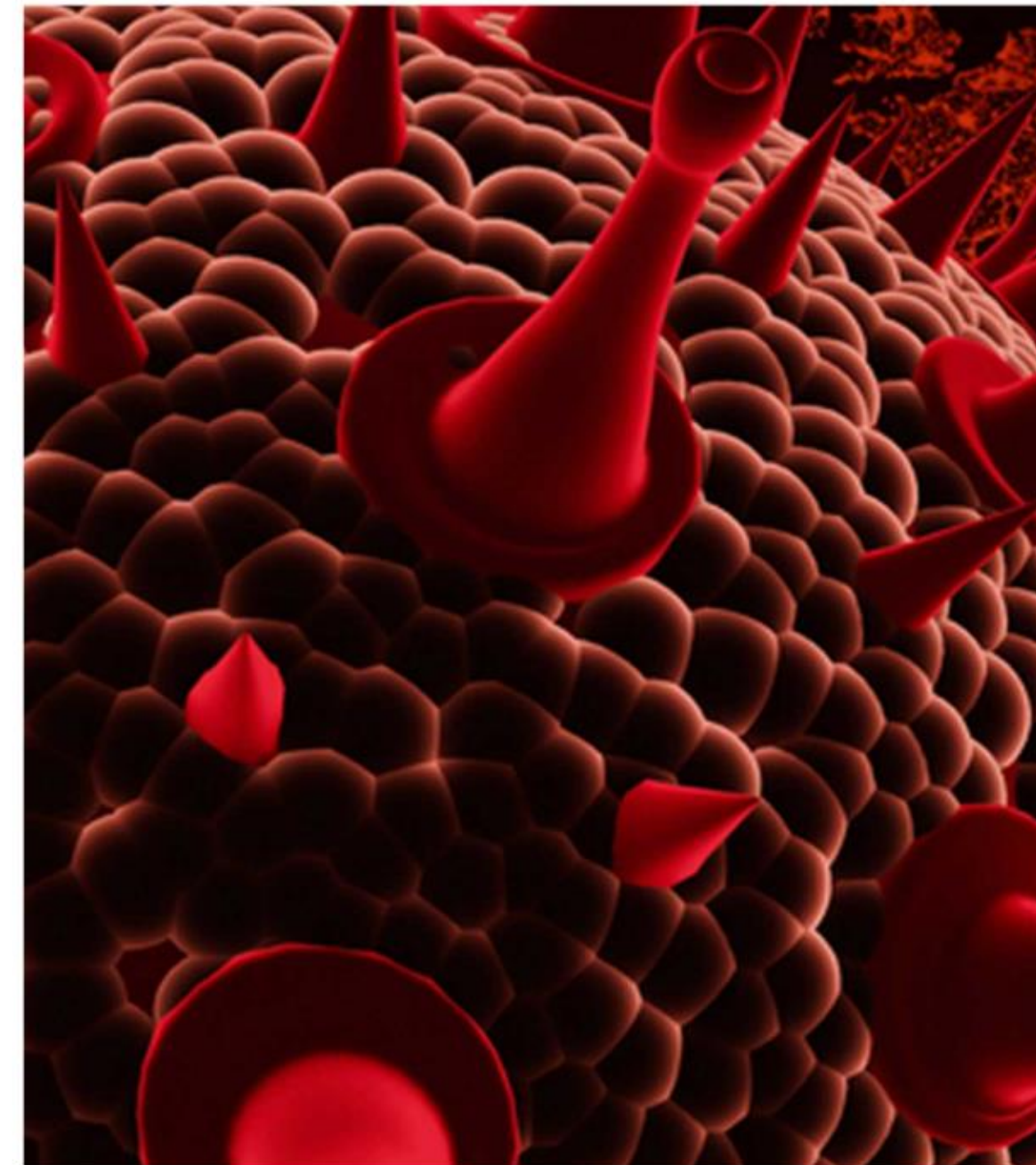Guidelines on viewing, segmenting and exporting data from the dashboard.

NAVIGATING THE DASHBOARD:

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

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 ⌄   (?)

Search...

65 %

- ▷ 📄 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 Blows
  - 📄 Avoiding Travel Until the Crisis Blows
  - 📄 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 Convention
  - 📄 Avoiding Conferences or Convention
  - 📄 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

Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination Analysts

FILTERING THE REPORT:

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.
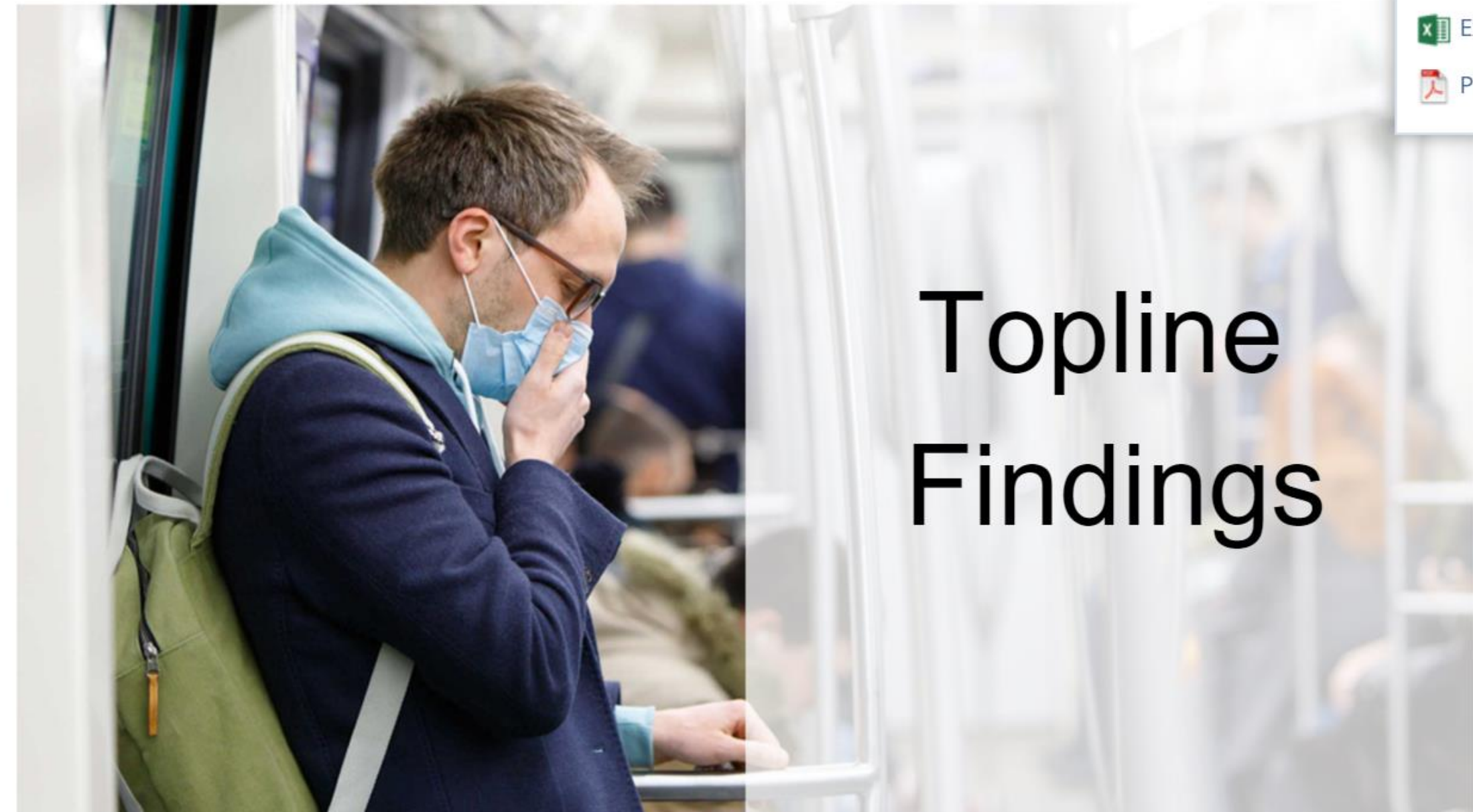
EXPORTING THE DATA:

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

Filters ⌄ Export ⌄ ?

Search...

PowerPoint
Excel
PDF

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 Corona
  Travel Affected by Coronavirus
  How Travel Was Affected by Corona
  How Travel Was Affected by Corona
  Why Travel Was Affected by Corona
  Why Travel Was Affected by Corona
  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
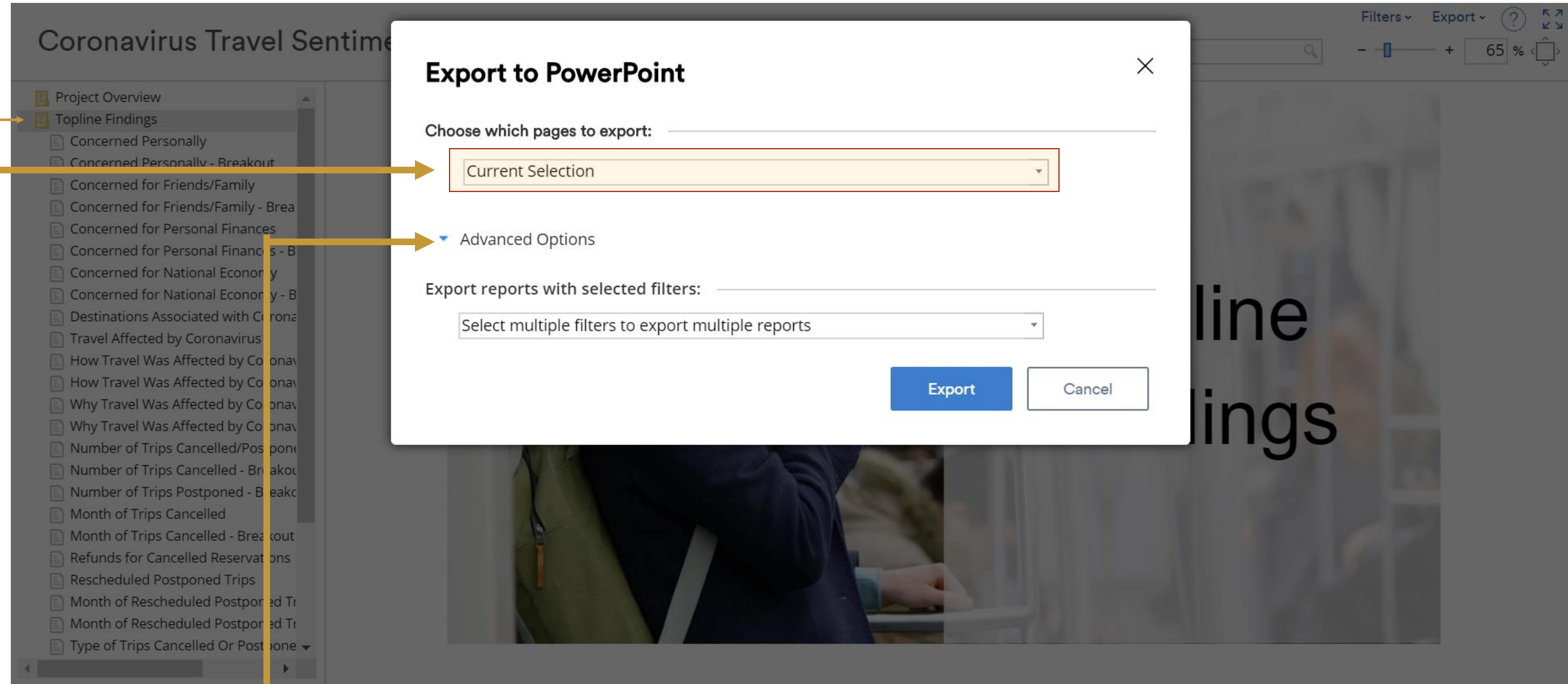 Type of Trips Cancelled Or Postpone

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.

Coronavirus Travel Sentime...

Filters ✓   Export ✓   ?   ⤢

65 %

- 🗎 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 Corona...
  - 🗎 Travel Affected by Coronavirus
  - 🗎 How Travel Was Affected by Corona...
  - 🗎 How Travel Was Affected by Corona...
  - 🗎 Why Travel Was Affected by Corona...
  - 🗎 Why Travel Was Affected by Corona...
  - 🗎 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...

Export to PowerPoint   ✕

Choose which pages to export:

Current Selection   ▾

▼ Advanced Options

Export reports with selected filters:

Select multiple filters to export multiple reports   ▾

Export   Cancel

line
dings

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