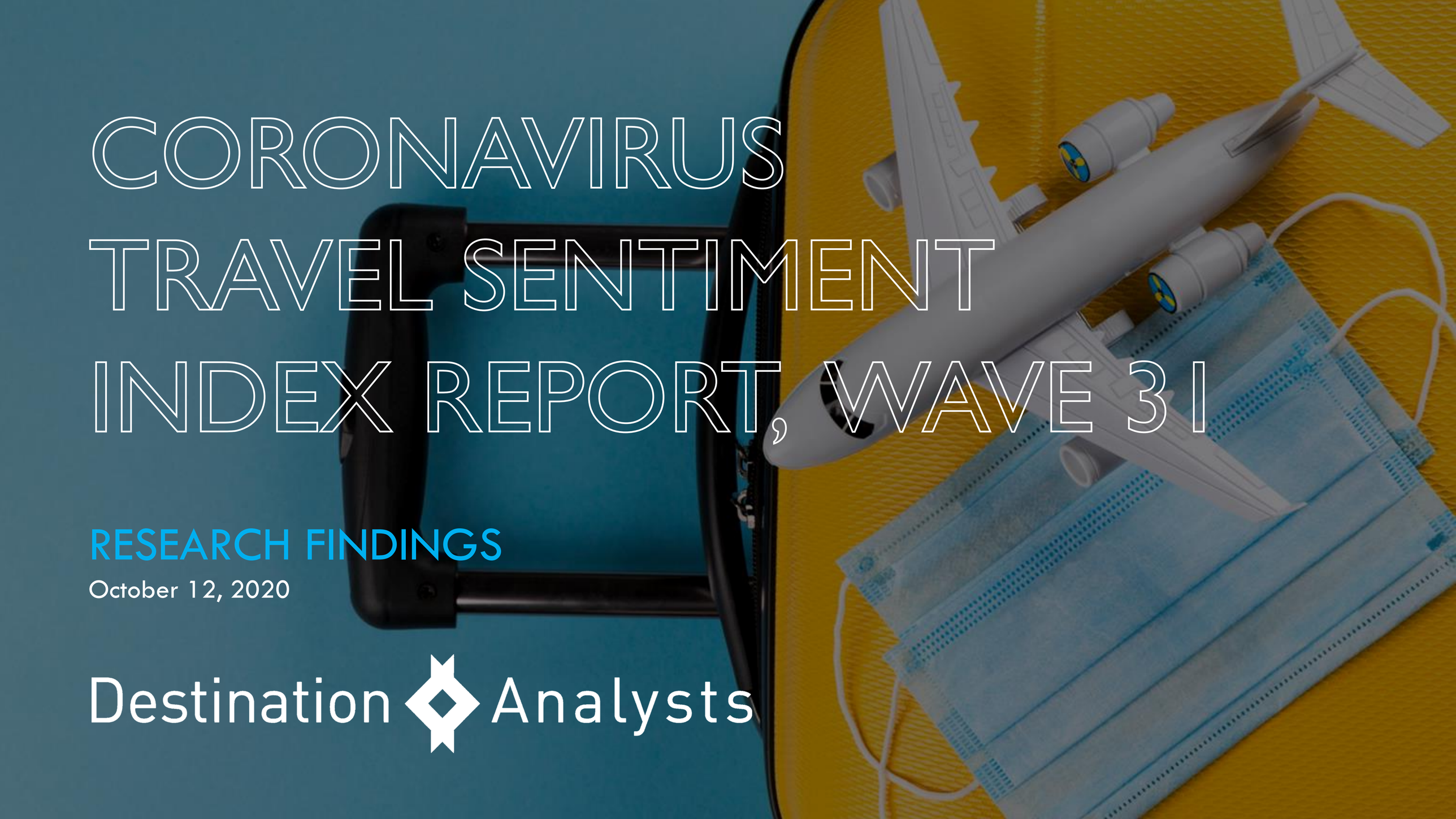
CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 31

RESEARCH FINDINGS

October 12, 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 31st 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 31st wave of this survey was collected from October 9th - 11th, 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, 1,203 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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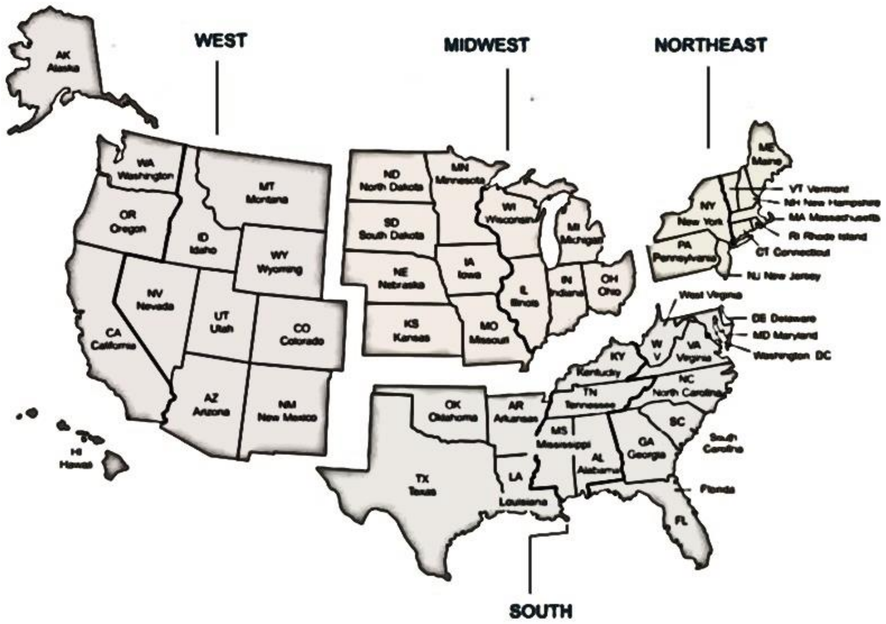
PROJECT OVERVIEW

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:



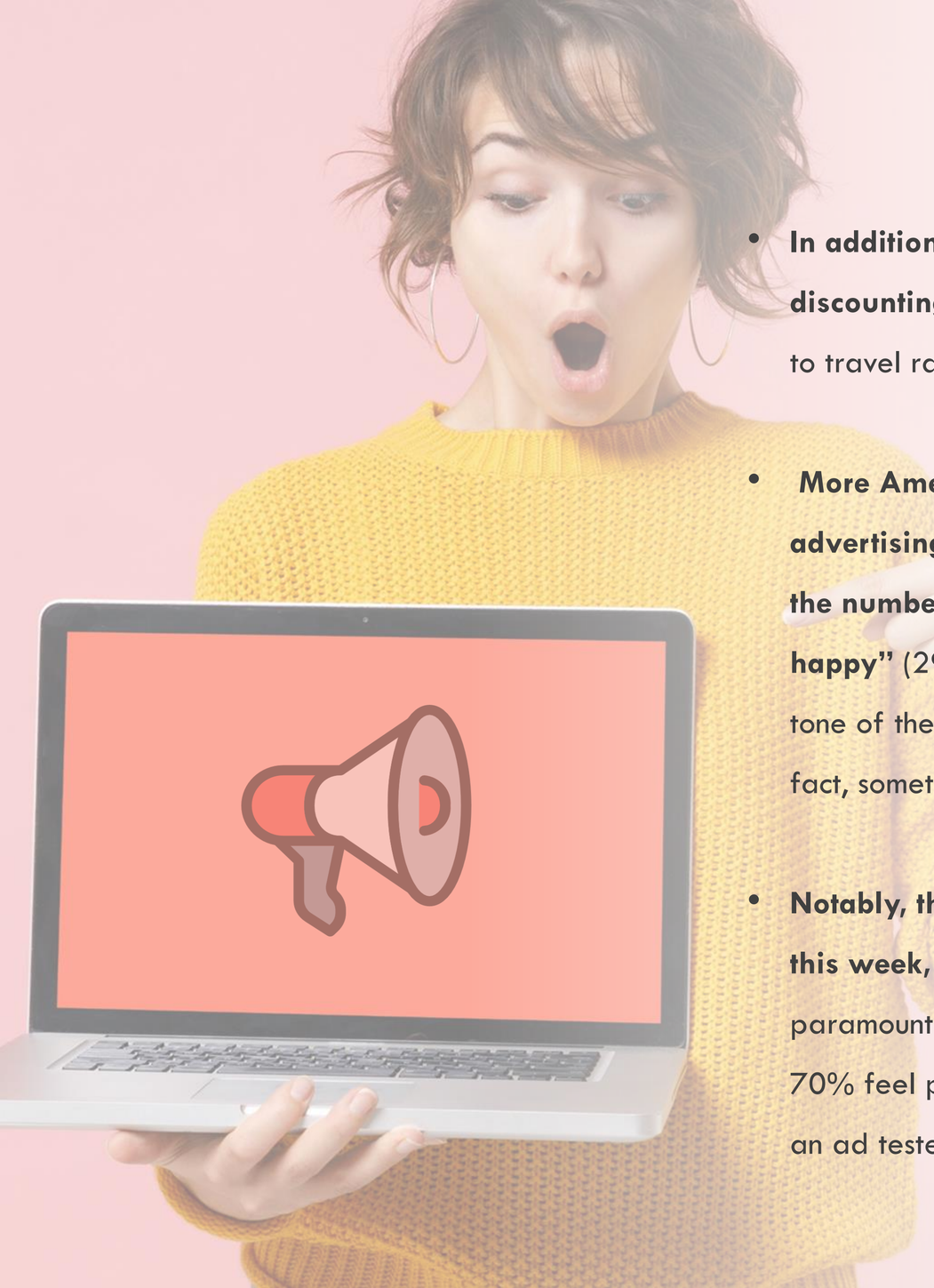
	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
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
Wave #30	October 2-4	October 5
Wave #31	**October 9-10**	**October 12**
Wave #32	October 16-18	October 19
Wave #33	October 23-25	October 26

TOP TAKEAWAYS

The following are the top takeaways that emerged from Wave 31 of this weekly consumer traveler sentiment tracking study.

- **American travelers' concerns about the novel coronavirus moved back up this week after decreasing last week, more notably fears about friends or family contracting the virus.** With several Midwestern states reporting record one-day rises in cases and hospitalizations, Wisconsin has now seen an increase in the number who name the state as a top destination most talked about as having coronavirus issues. The percent of American travelers who say they are less likely to visit a place in the post-pandemic future because of their current Coronavirus-related issues has gone back up to 33.5% from 28.4% one month ago.

- **Nevertheless, consumer aspiration and demand for travel continues to express itself.** Approximately 80% of American travelers continue to report that they have at least tentative trip plans right now and about 40% say their very next trip will take place this Fall. At least a quarter of American travelers report that leisure travel will be an essential or high priority in their spending in the next three months, on par with or even ahead of gifts for friends and relatives, online entertainment and home improvements. Excitement for potential near-term getaways and openness to travel inspiration continues slowly increasing.



TOP TAKEAWAYS

- **In addition, more Americans than any other time during the pandemic period are now open to discounting as a travel motivator—**a sign that a proportion of American travelers have now opened up to travel rather than being firmly unwilling.

- **More American travelers than ever during the pandemic period are now able to recall recent travel advertising and, more importantly, there has also been a 10% increase in the last three months of the number of American travelers who say the most recent travel ad they saw made them "very happy"** (29.3%—while another 32.7% reported the ad made them "happy"). When asked about the tone of the travel advertising they want to see right now, Americans are seeking honesty but friendliness. In fact, something that strikes an authoritative tone is largely seen as a turn-off.

- **Notably, the perception of travel activities as unsafe declined again to a new pandemic period low this week, inching closer to where perceptions were March 15th.** However, COVID-19 safety remains paramount to most American travelers' trip decisions. Thus, when it comes to travel advertising, nearly 70% feel positive or very positive about seeing travelers with face masks in travel ads (after shown such an ad tested in this week's survey), while less than 10% have a negative response.

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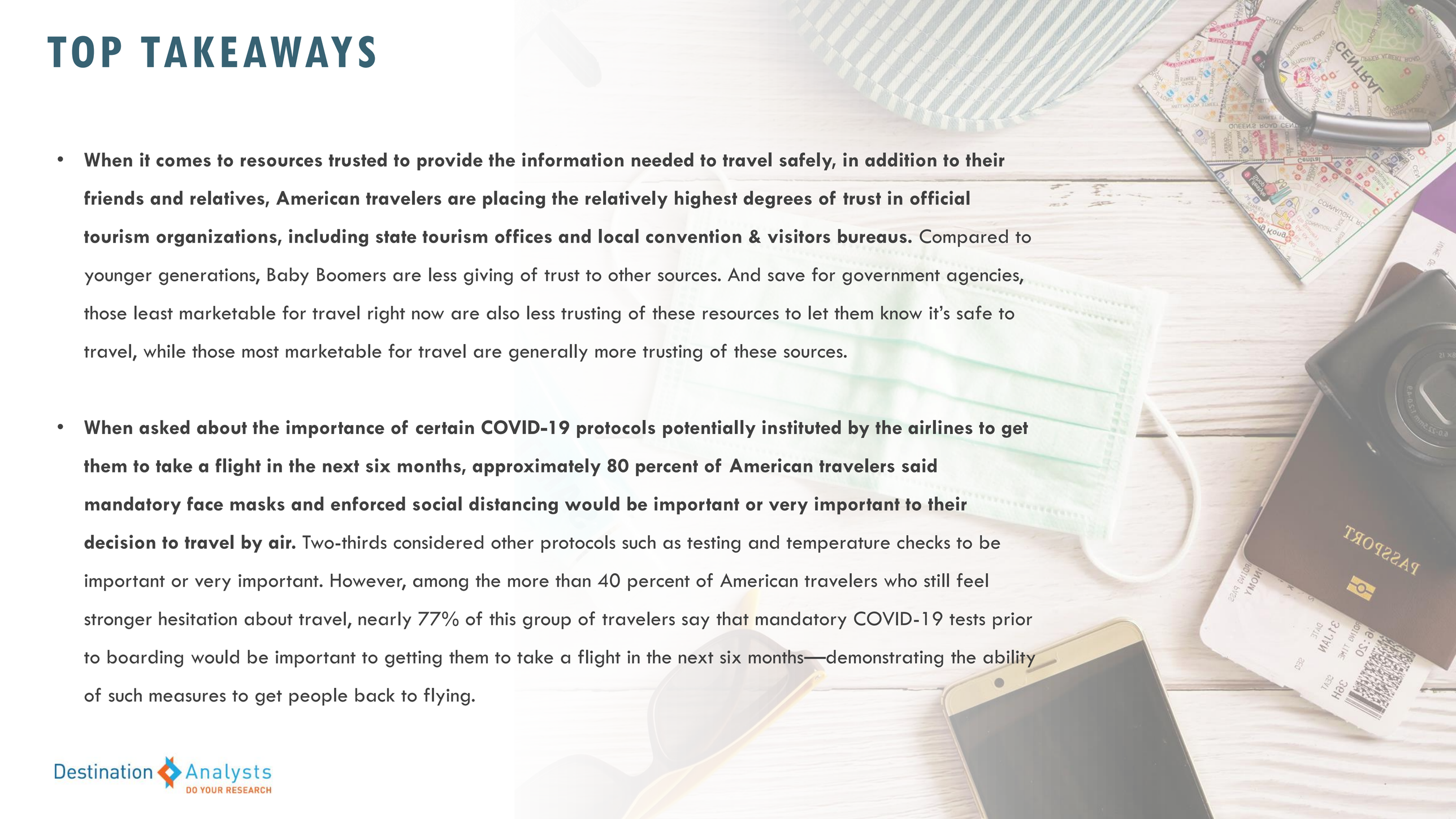
TOP TAKEAWAYS

- **When it comes to resources trusted to provide the information needed to travel safely, in addition to their friends and relatives, American travelers are placing the relatively highest degrees of trust in official tourism organizations, including state tourism offices and local convention & visitors bureaus.** Compared to younger generations, Baby Boomers are less giving of trust to other sources. And save for government agencies, those least marketable for travel right now are also less trusting of these resources to let them know it's safe to travel, while those most marketable for travel are generally more trusting of these sources.

- **When asked about the importance of certain COVID-19 protocols potentially instituted by the airlines to get them to take a flight in the next six months, approximately 80 percent of American travelers said mandatory face masks and enforced social distancing would be important or very important to their decision to travel by air.** Two-thirds considered other protocols such as testing and temperature checks to be important or very important. However, among the more than 40 percent of American travelers who still feel stronger hesitation about travel, nearly 77% of this group of travelers say that mandatory COVID-19 tests prior to boarding would be important to getting them to take a flight in the next six months—demonstrating the ability of such measures to get people back to flying.



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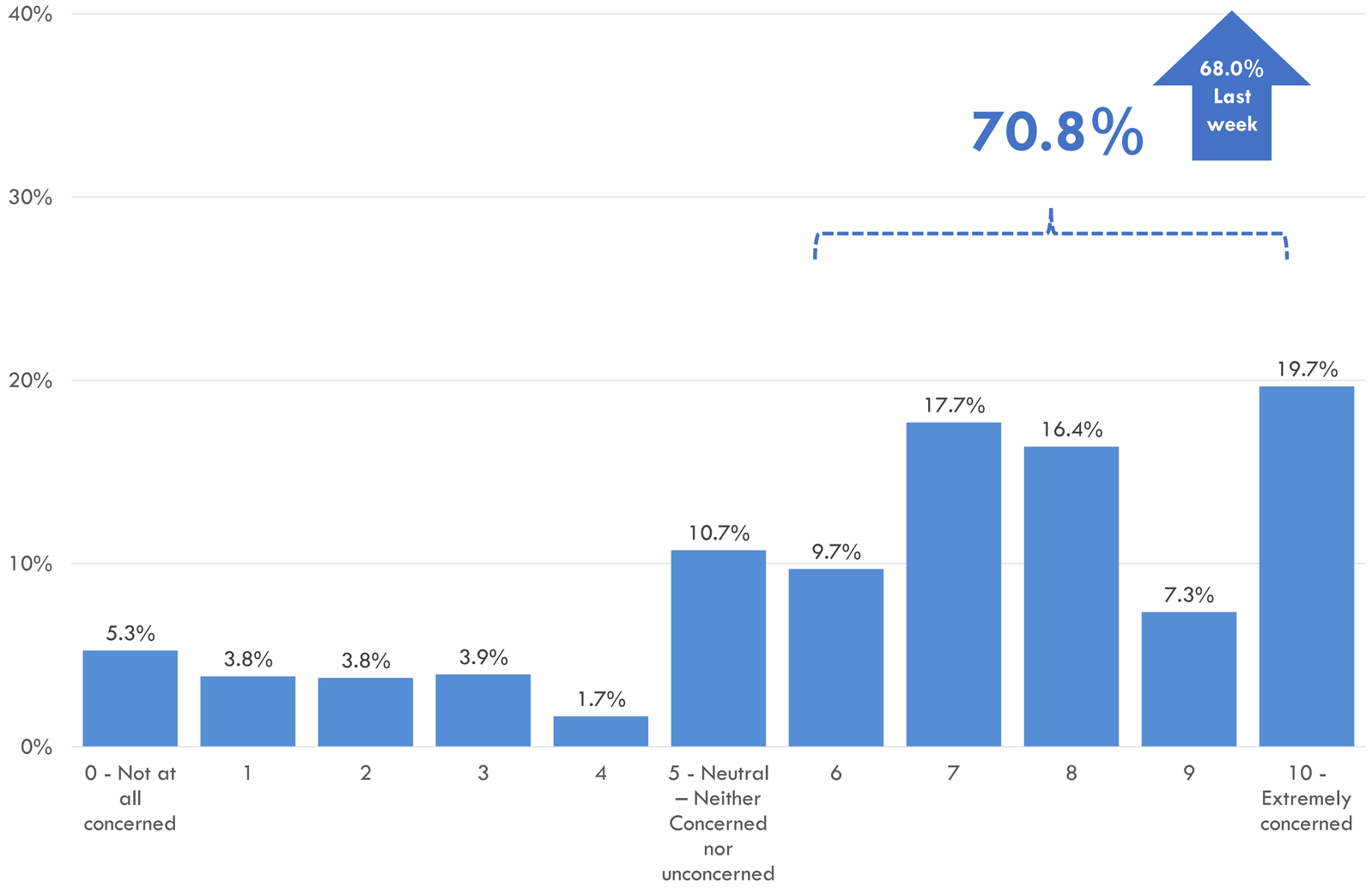
CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL

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 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



PERSONAL HEALTH CONCERNS (WAVES 1-31)

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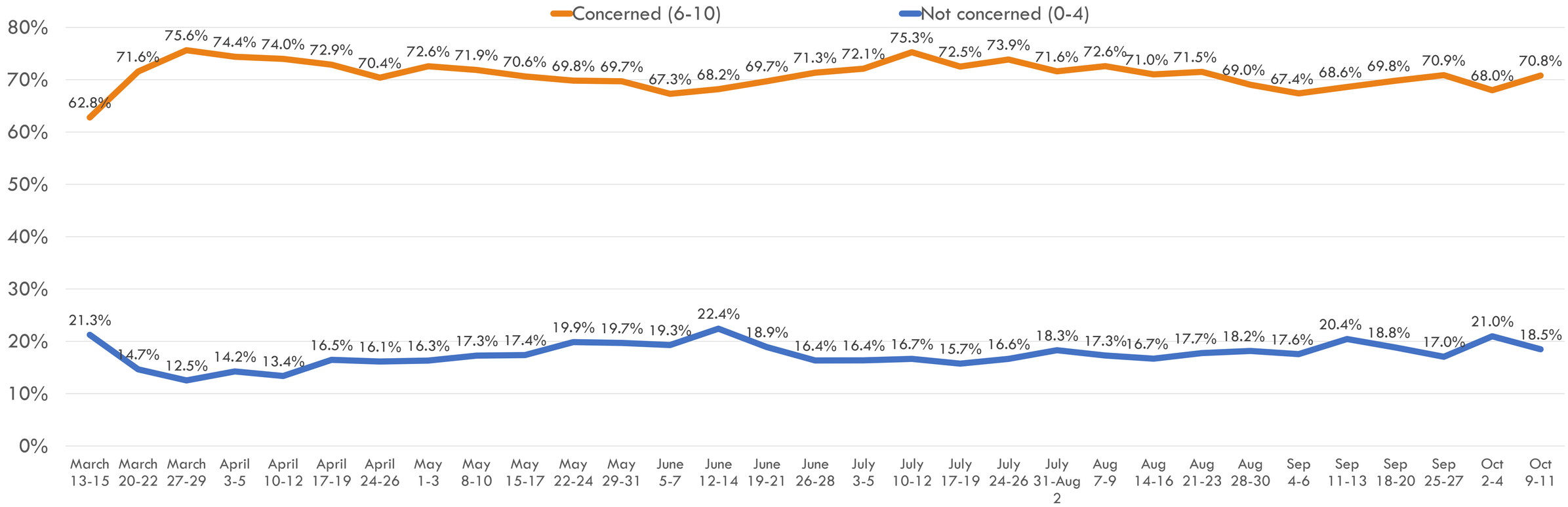
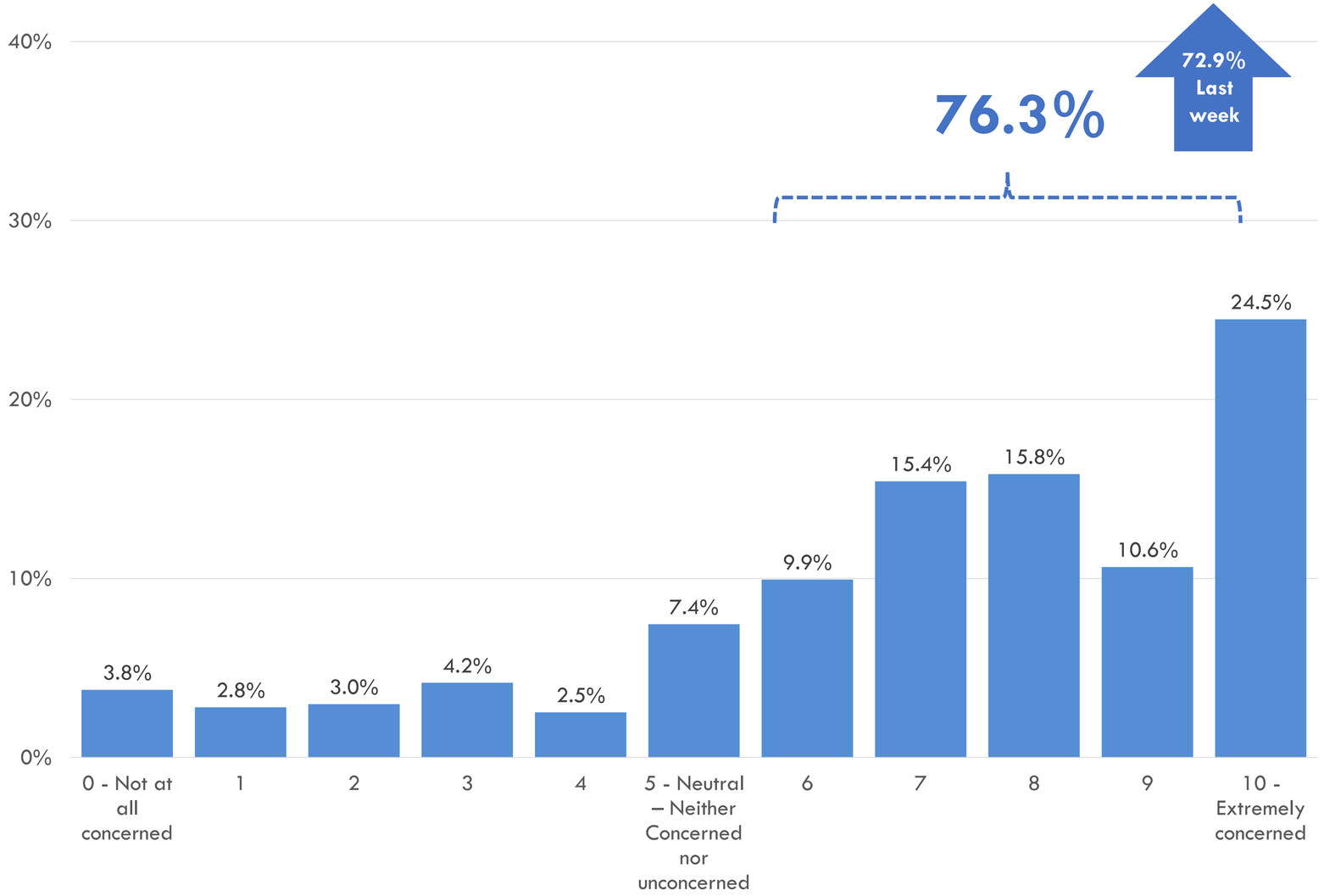


(Base: Waves 1-31. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

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 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-31)

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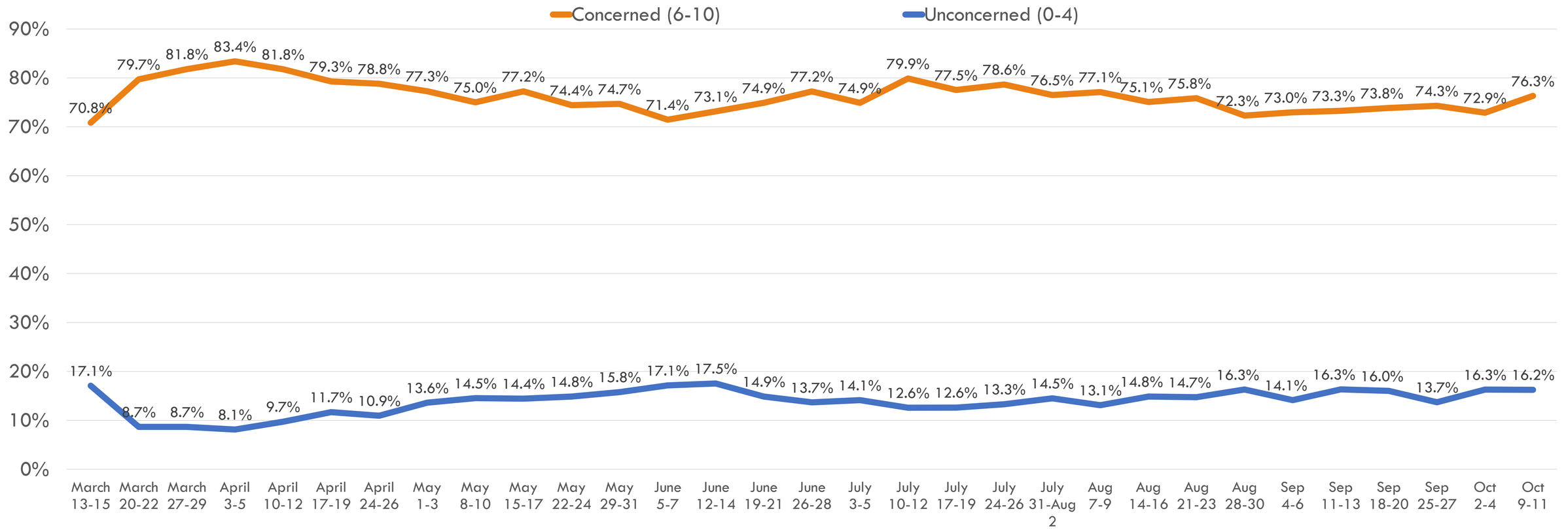

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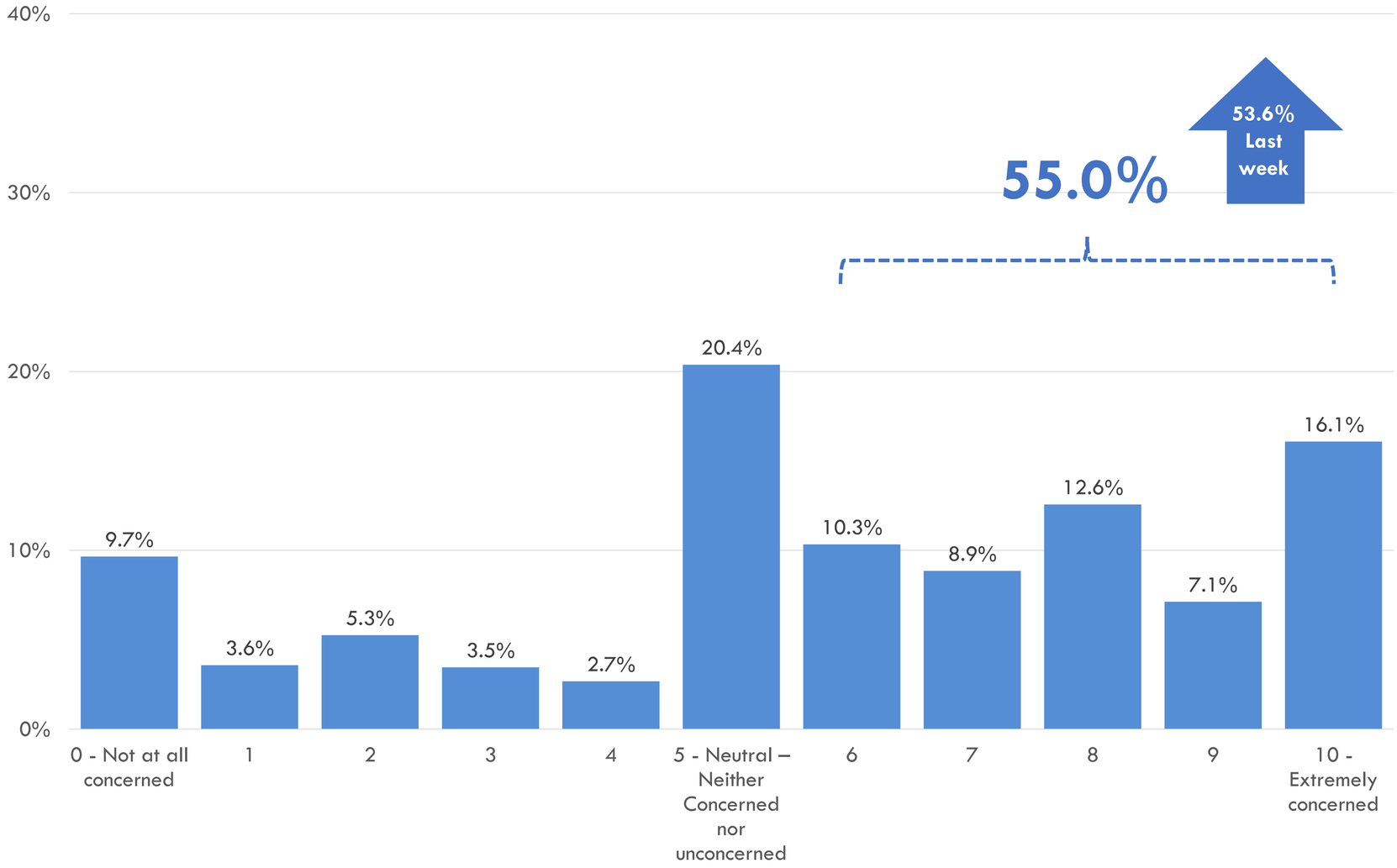
CONCERNS ABOUT PERSONAL FINANCES

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

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-31)

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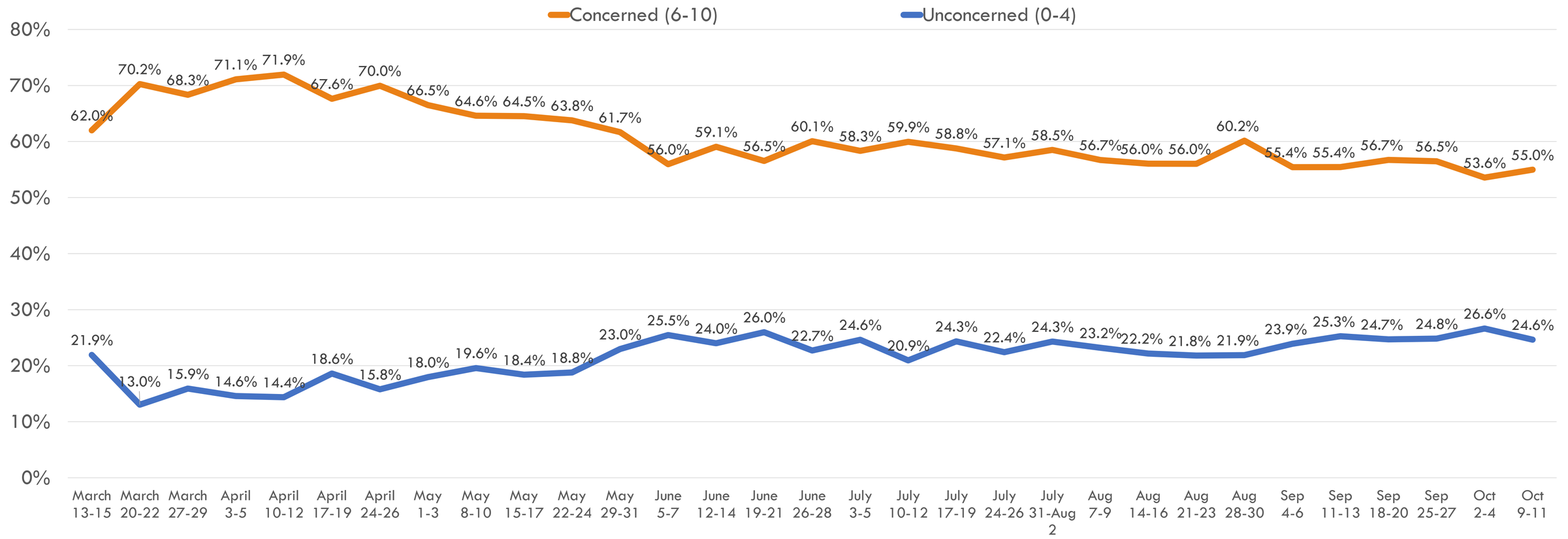

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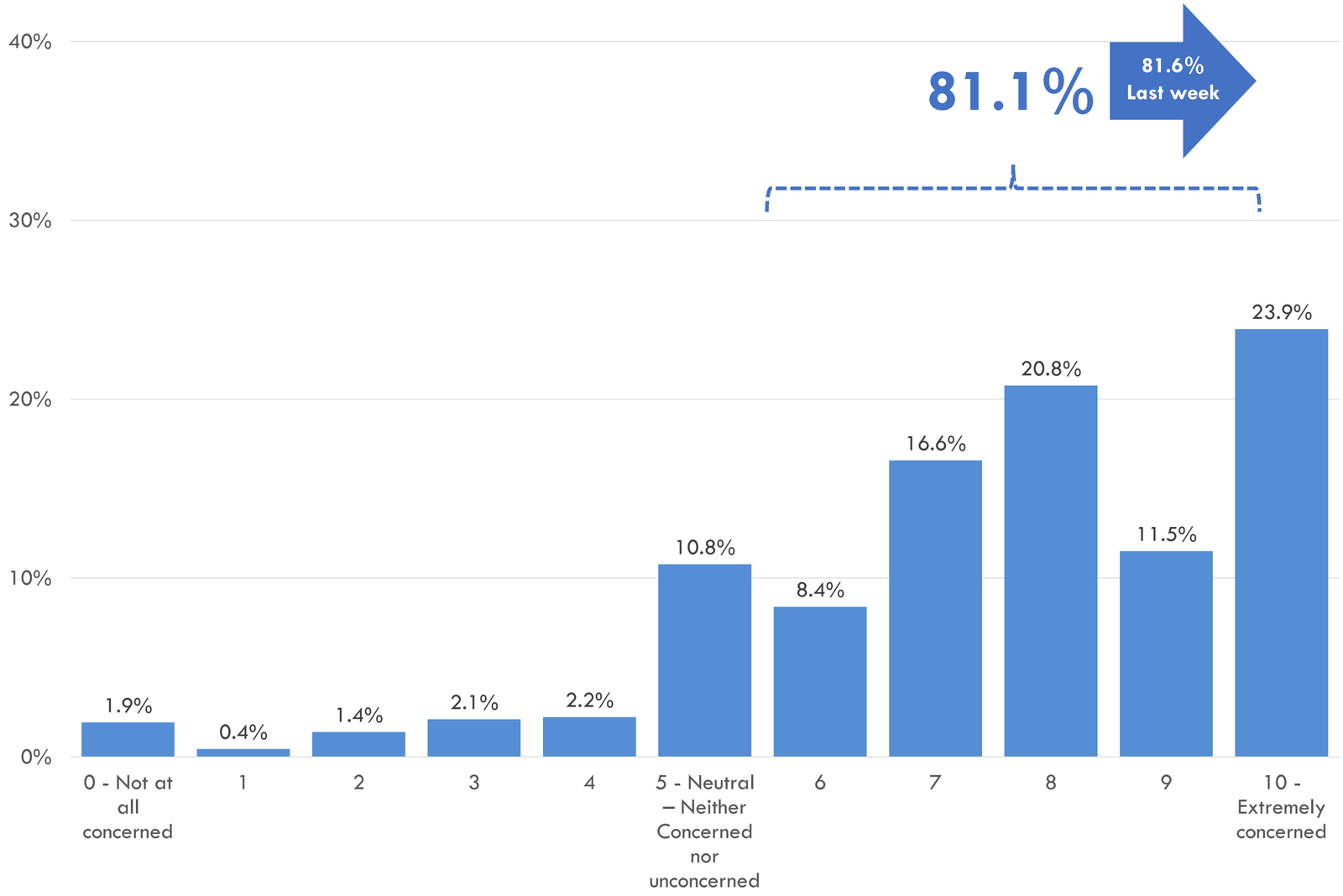
CONCERNS ABOUT NATIONAL ECONOMY

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

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-31)

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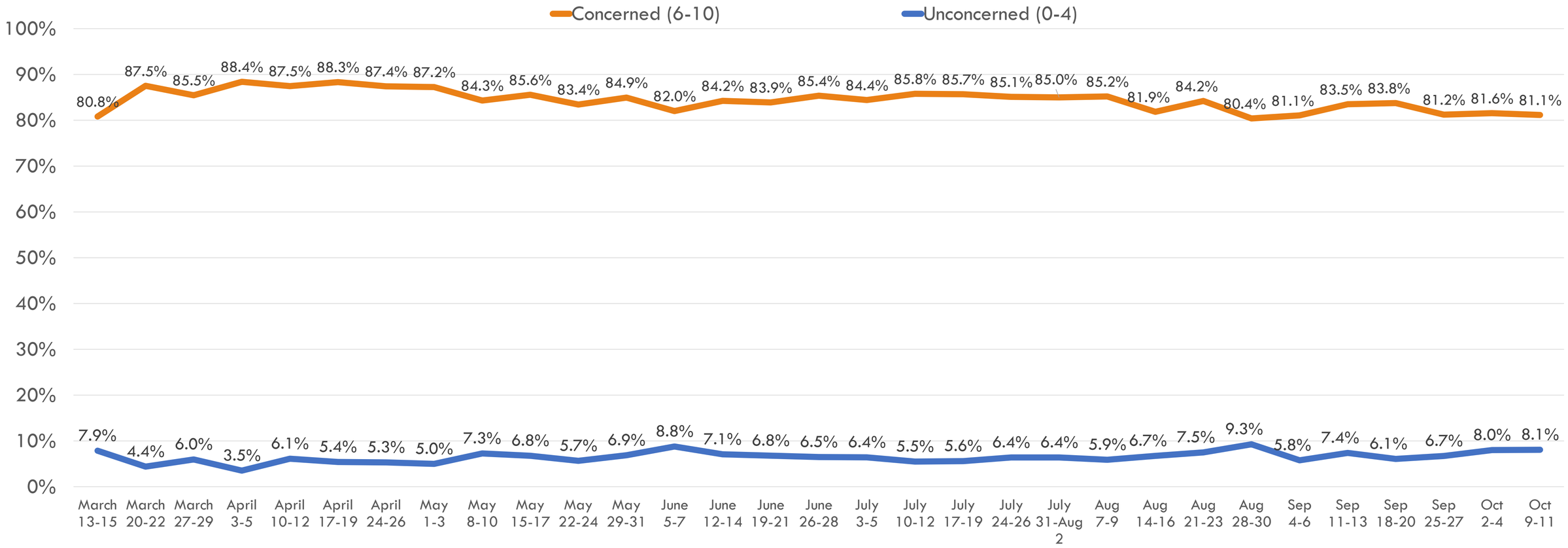

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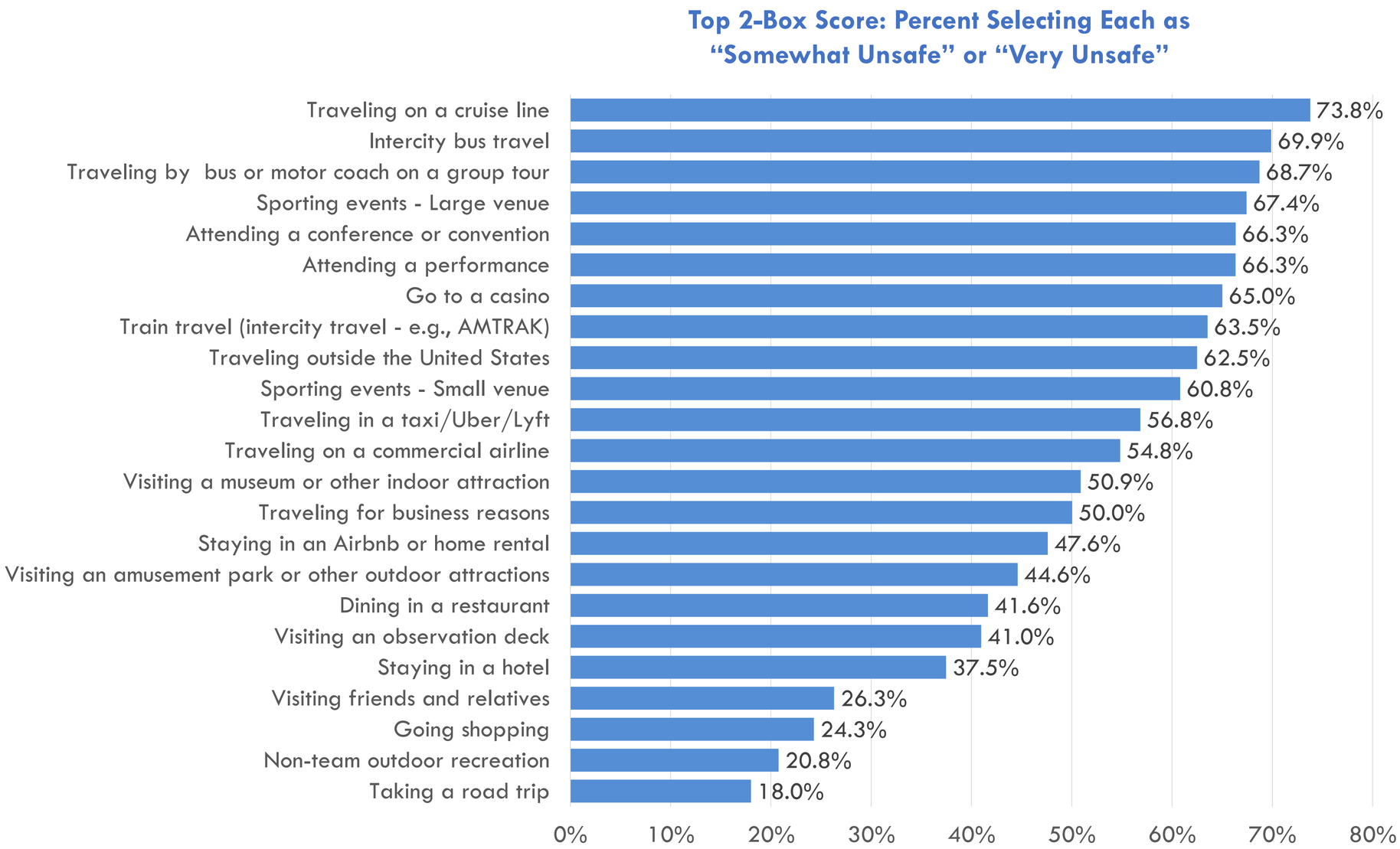
PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 31)

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

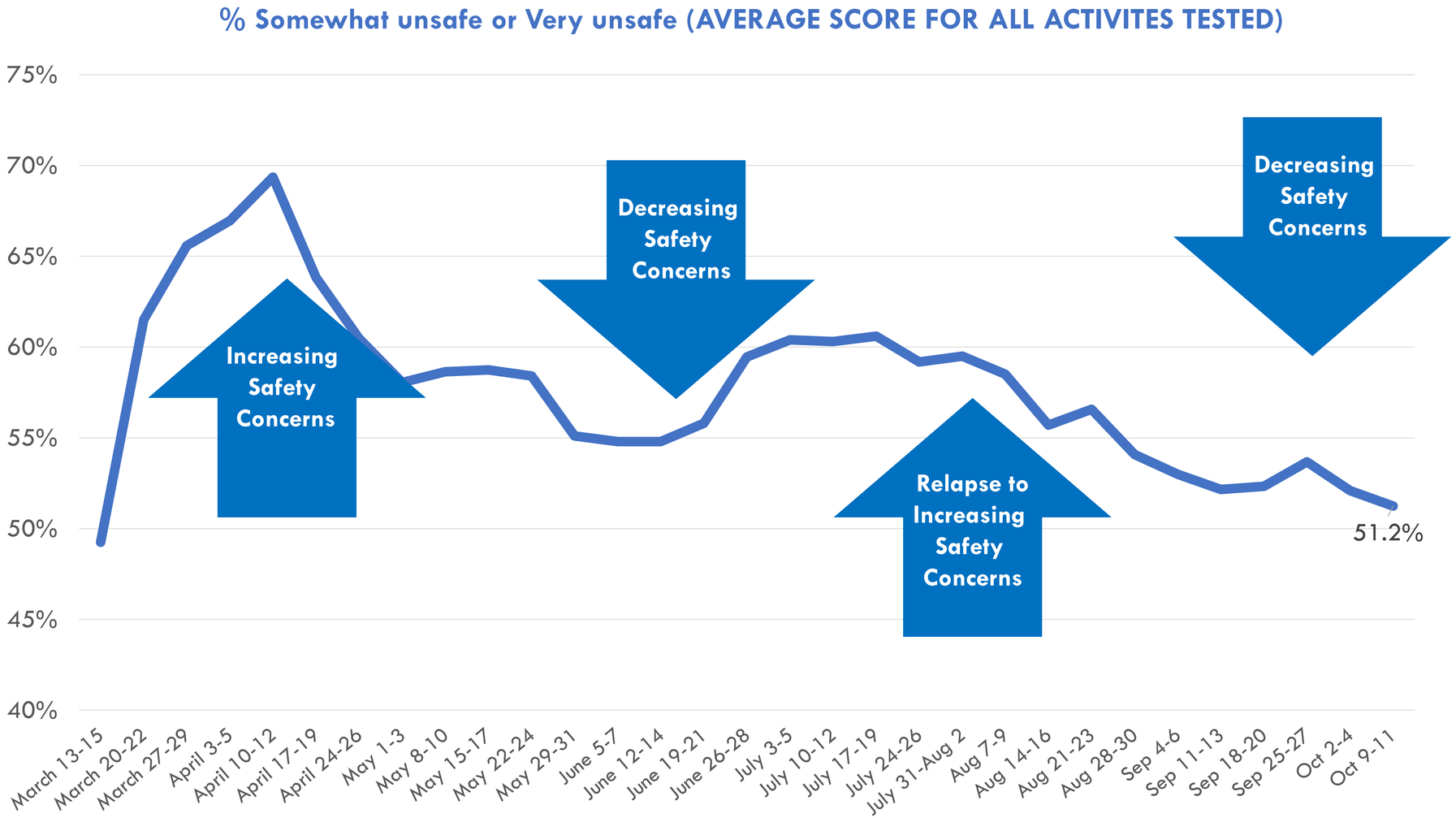
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-31 COMPARISON)

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

(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

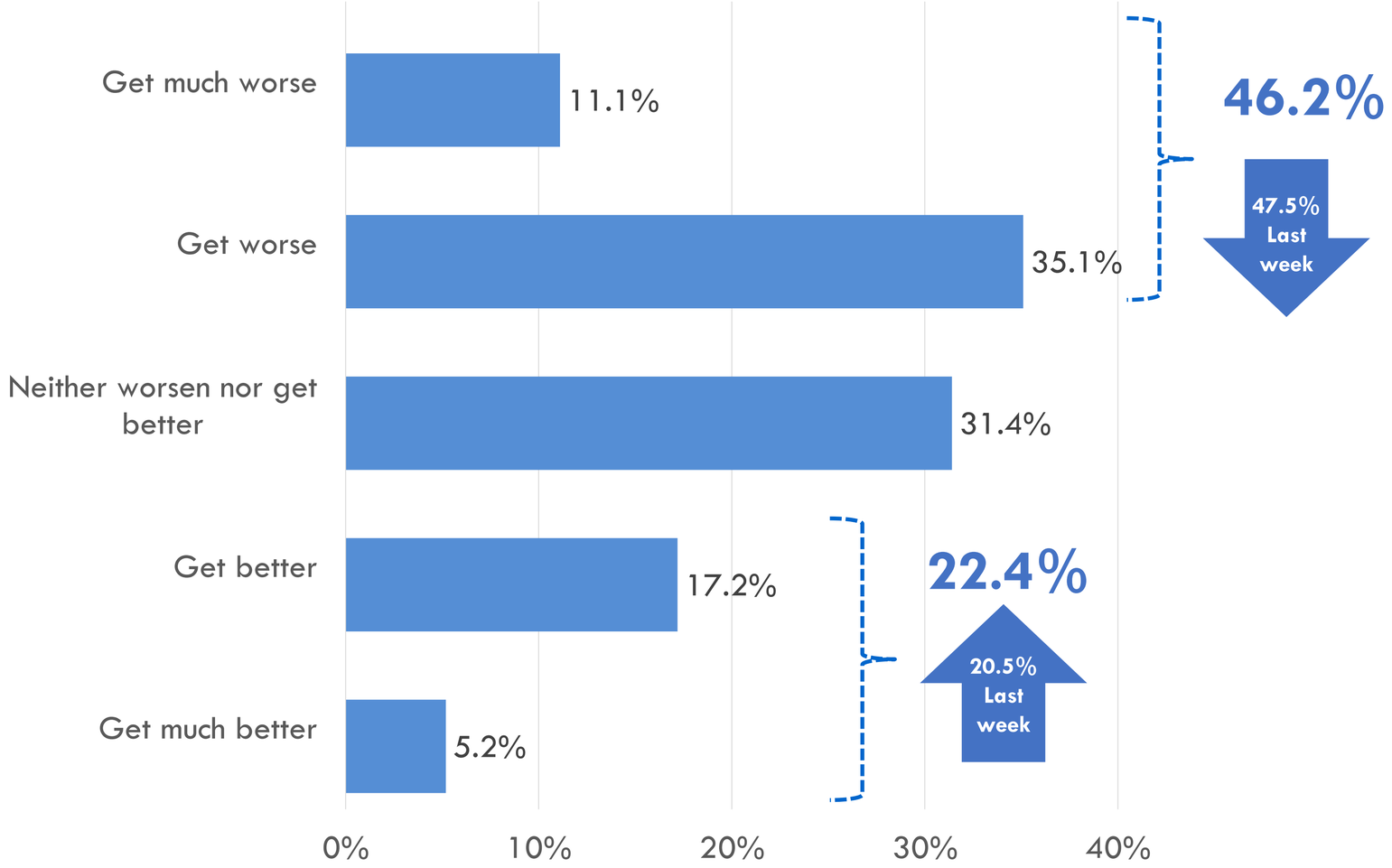


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



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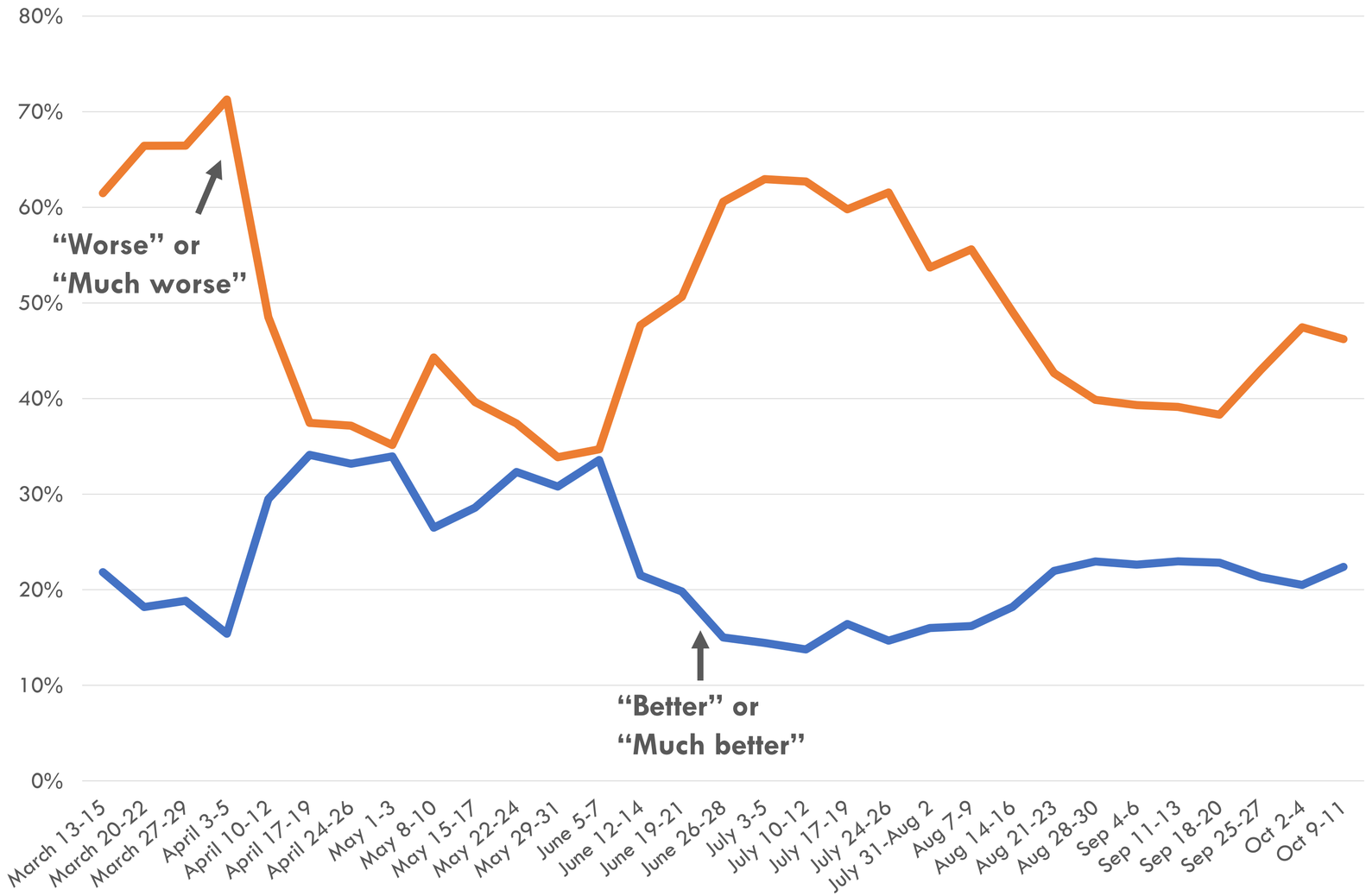

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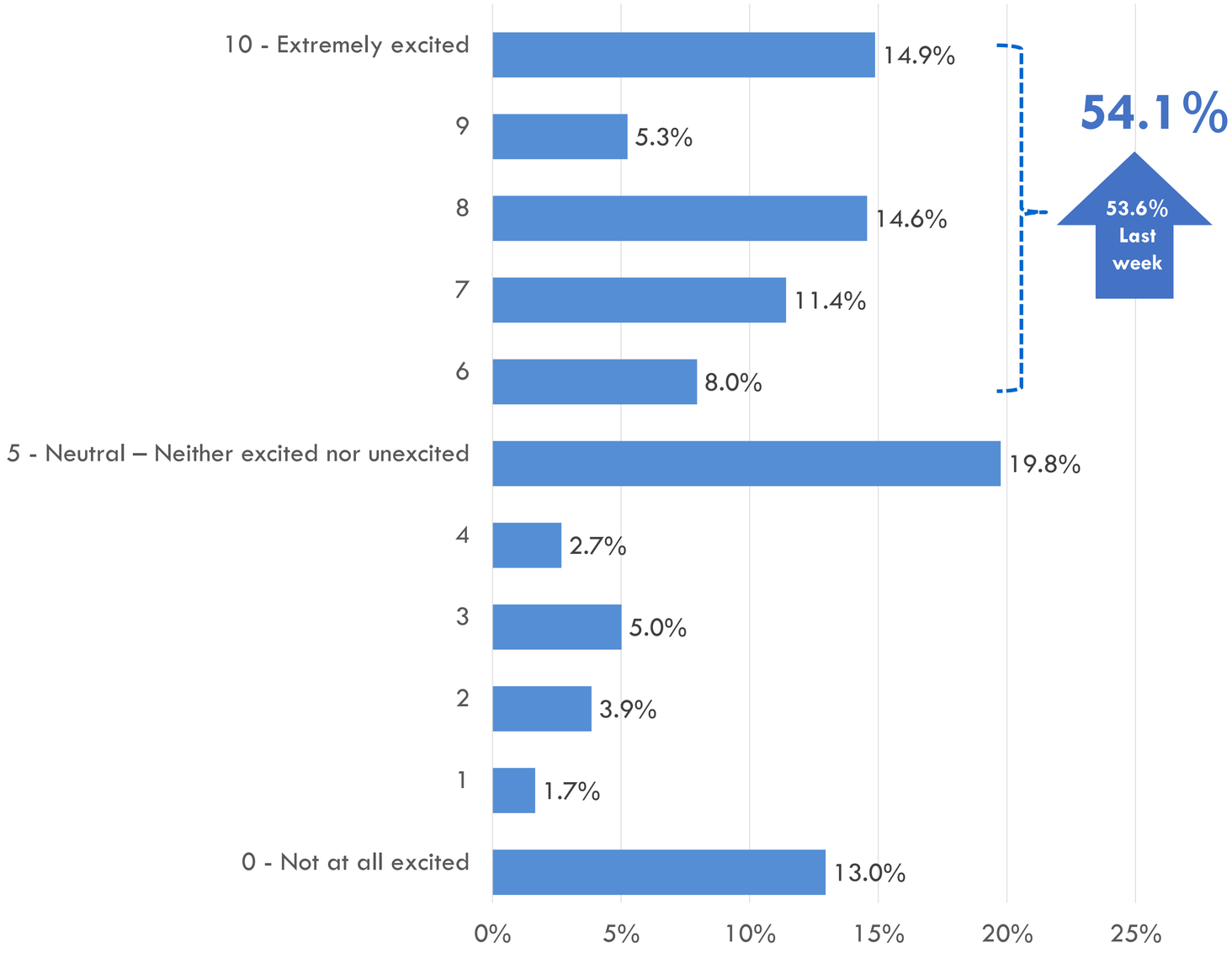
EXCITEMENT TO TRAVEL NOW

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)

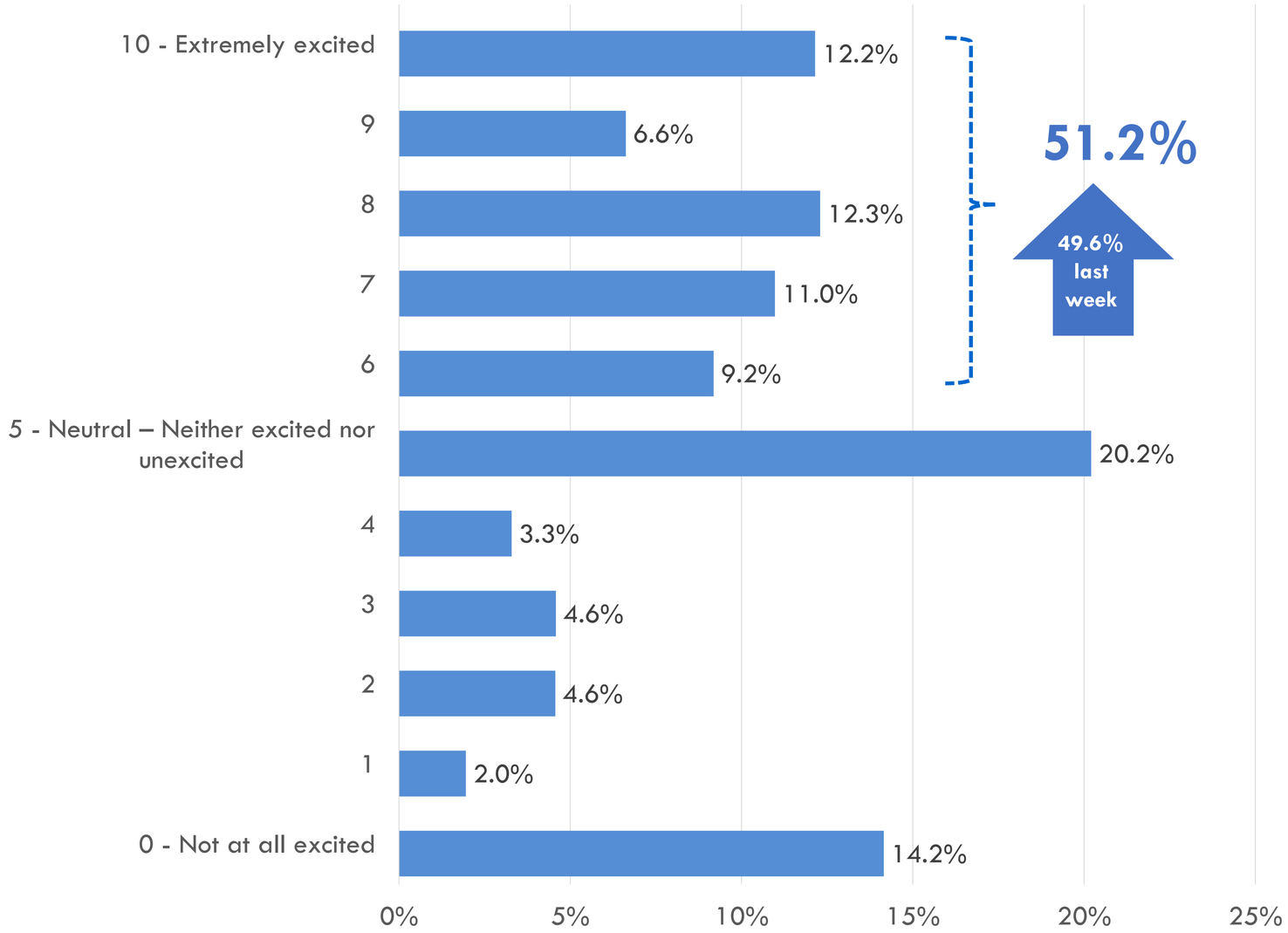
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



OPENNESS TO TRAVEL INFORMATION

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

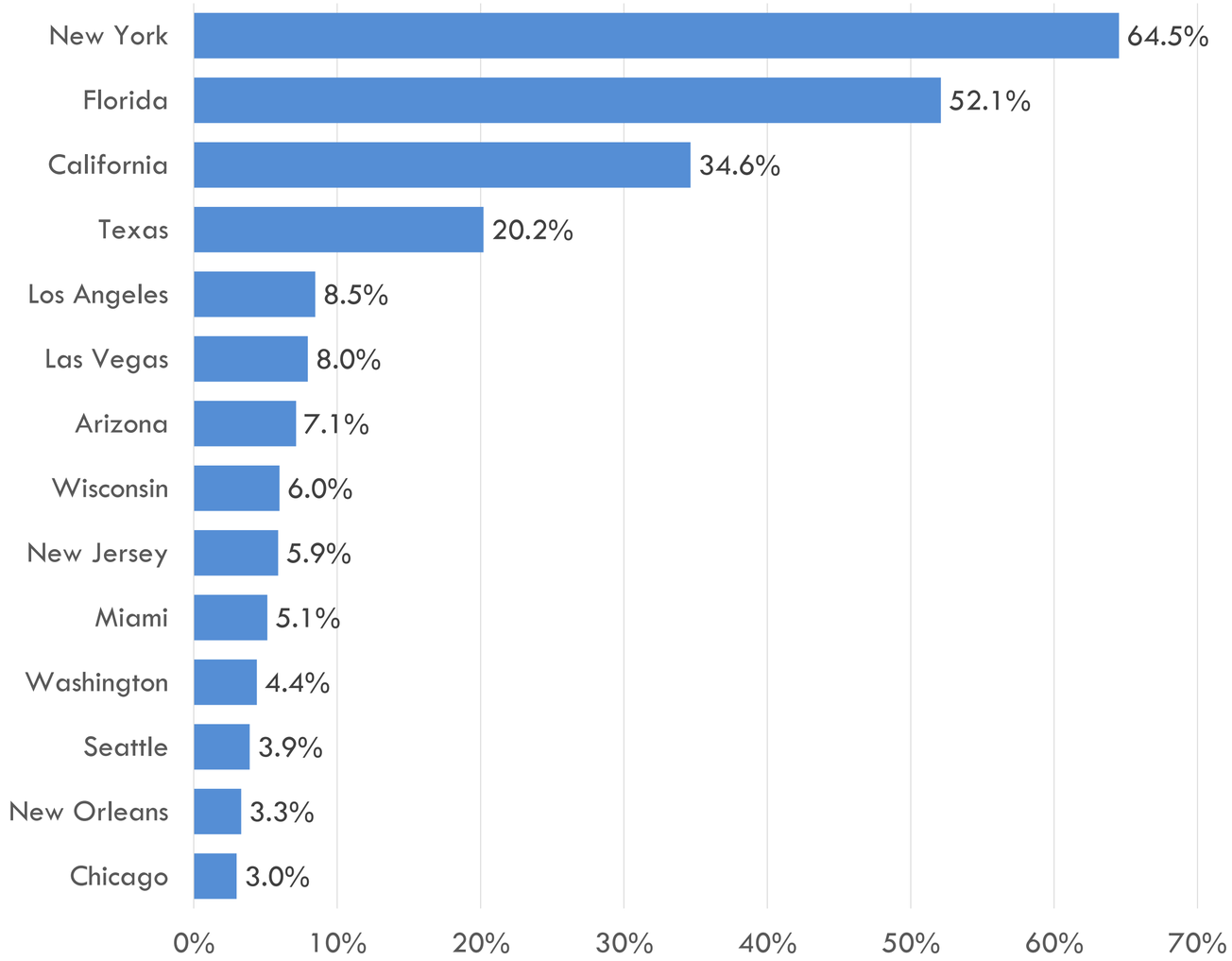
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



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 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



MOST TALKED ABOUT CORONAVIRUS HOTSPOTS (WAVES 1-31)

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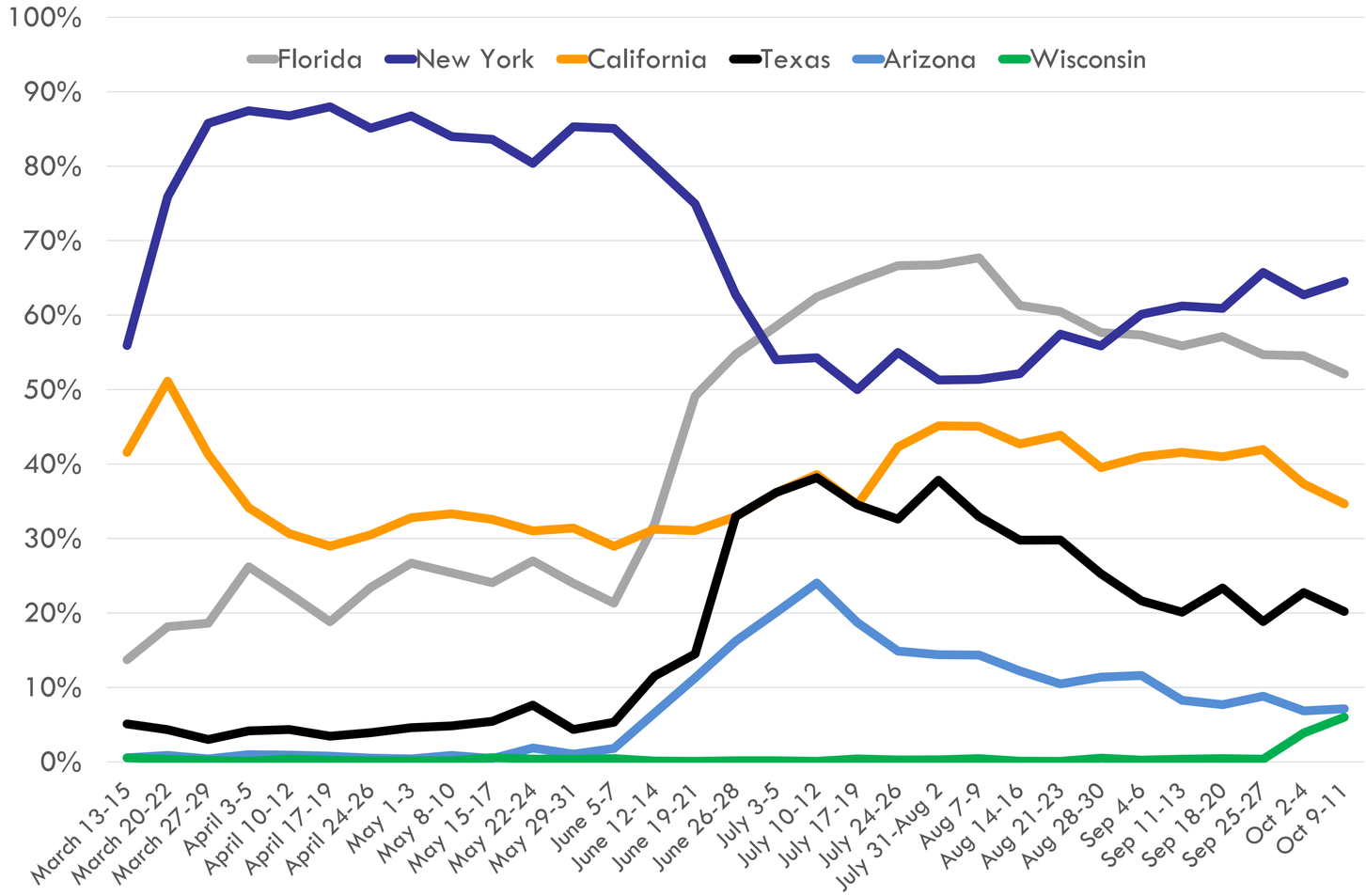
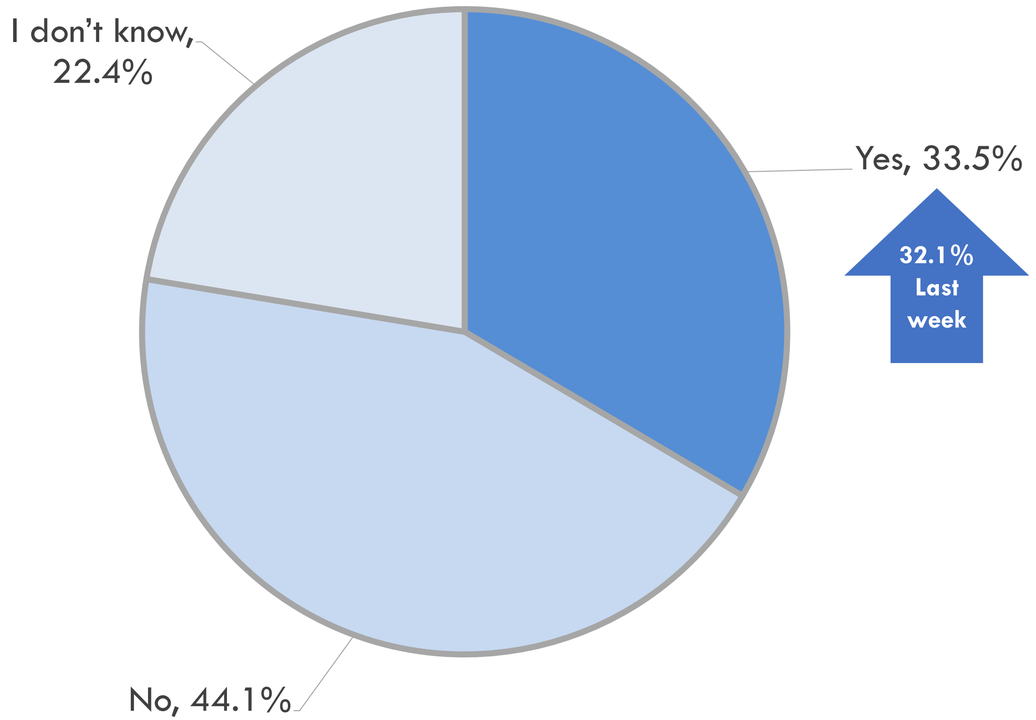


IMPACT OF CORONAVIRUS ISSUES ON FUTURE INTENT TO VISIT

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

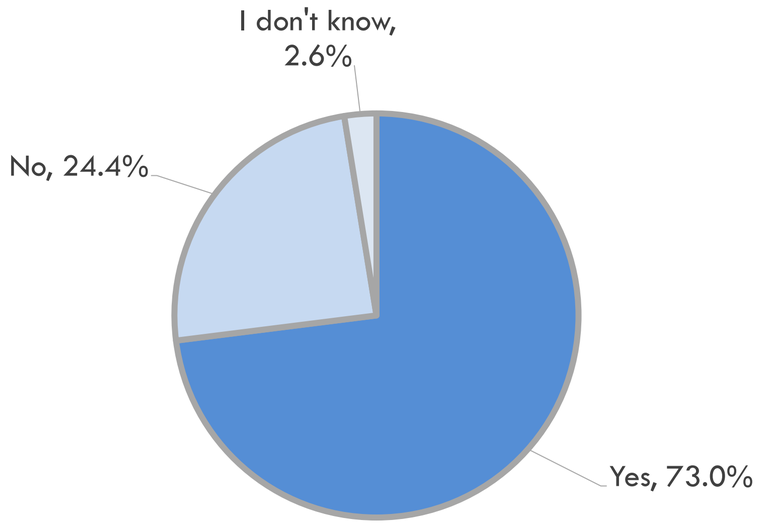
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



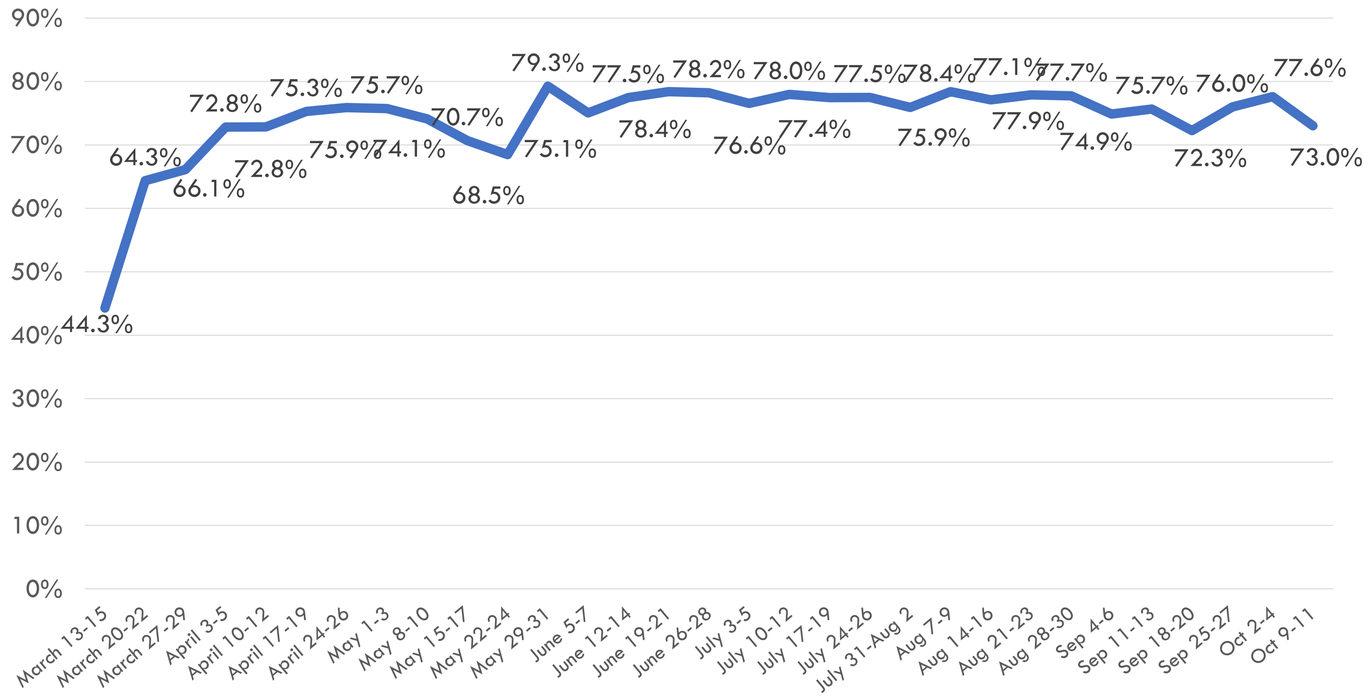
THE PANDEMIC'S IMPACT ON TRAVEL

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



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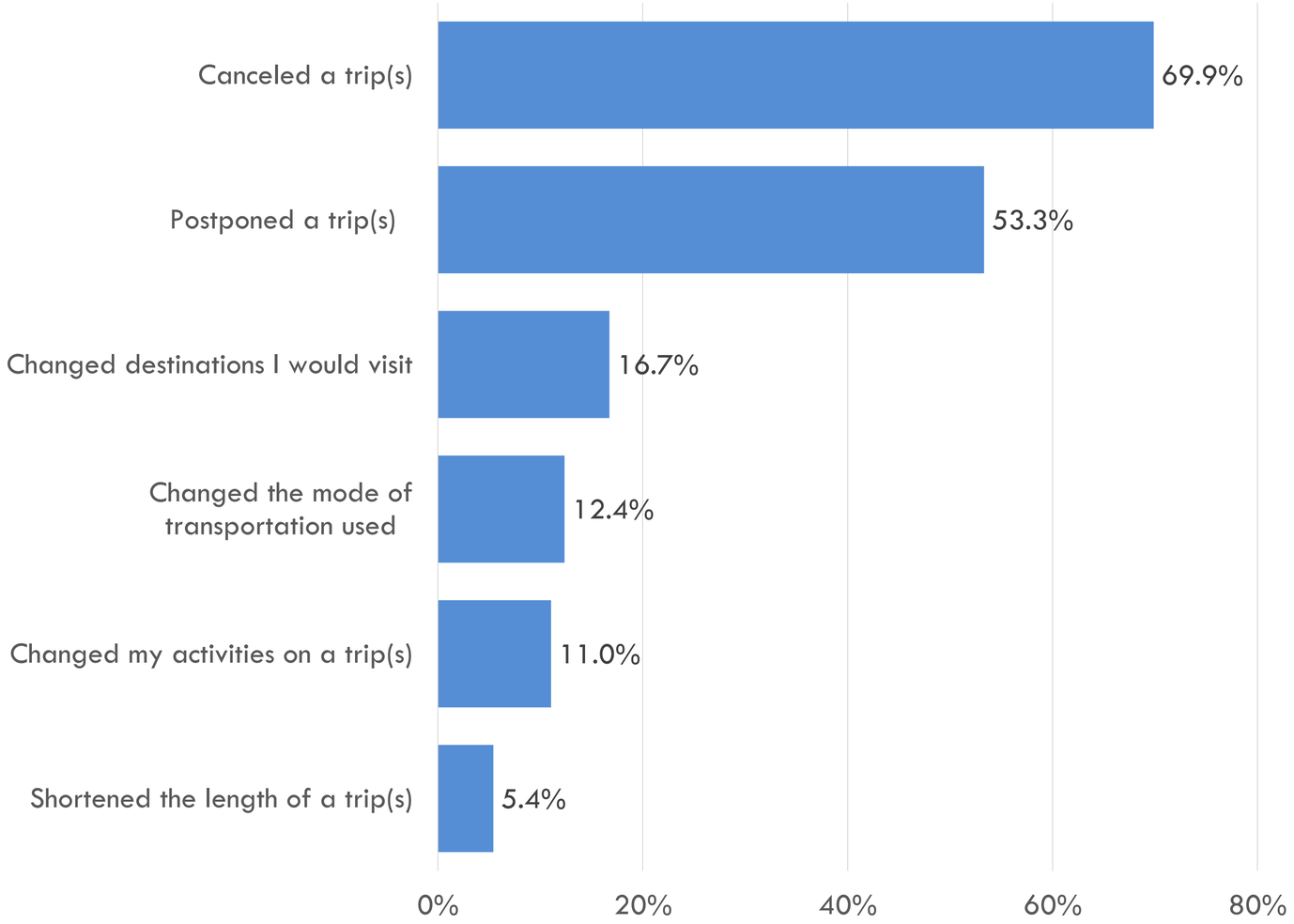
HOW THE CORONAVIRUS HAS IMPACTED TRAVEL

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

Due to the coronavirus situation, I have_____.

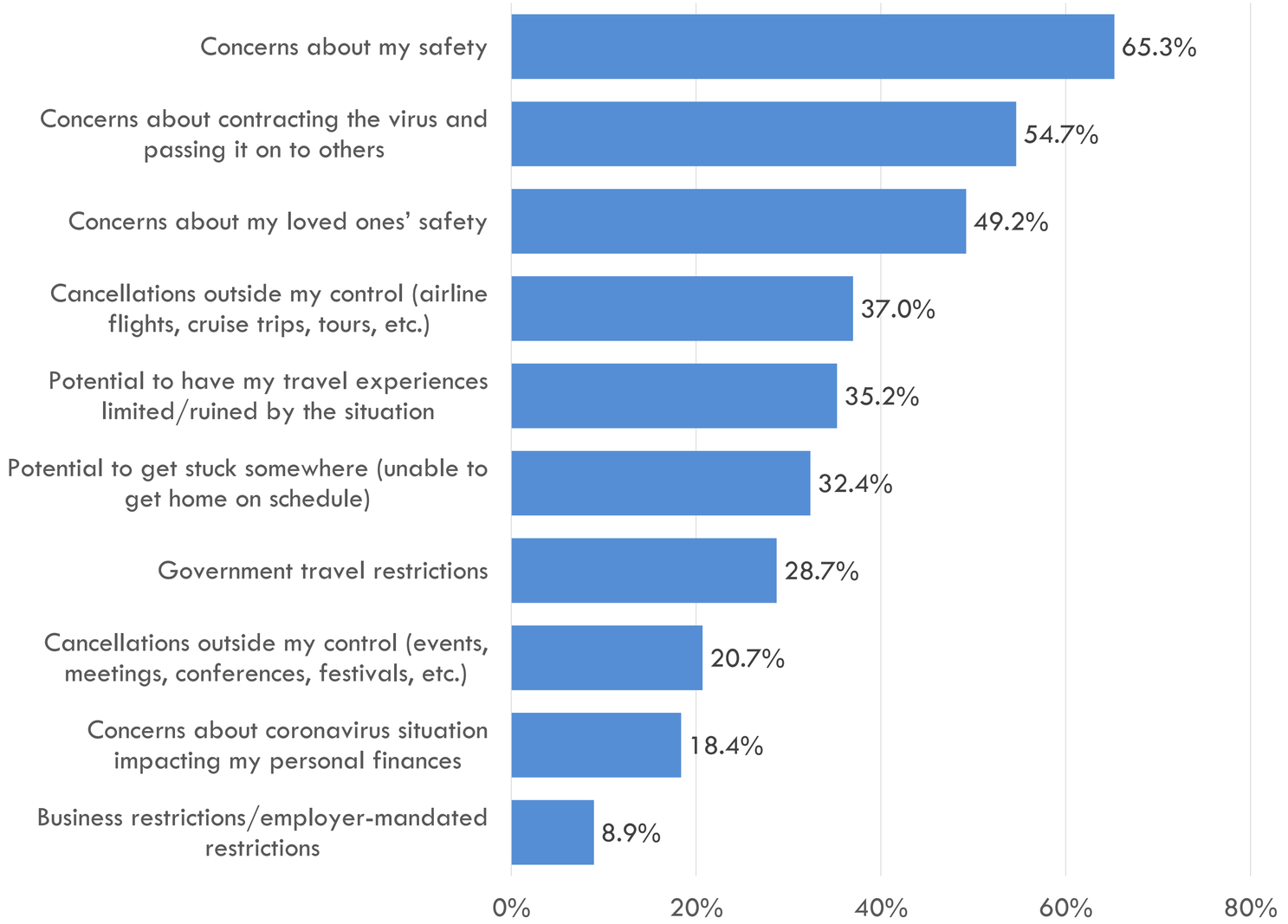
(Base: Wave 31. Respondents whose travel was impacted by the coronavirus, 900 completed surveys. Data collected Oct 9-11, 2020)



WHY THE CORONAVIRUS IS IMPACTING TRAVEL

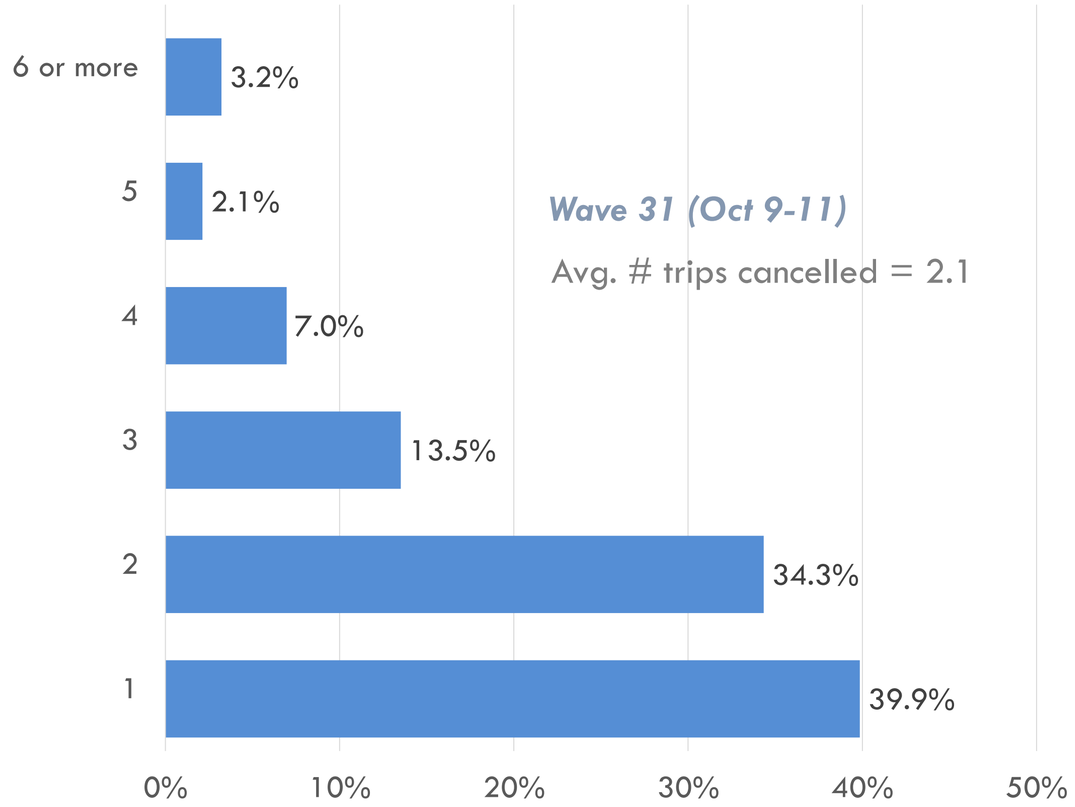
Question: Which of the following are reasons the coronavirus situation has changed your travels?

(Base: Wave 31. Respondents whose travel was impacted by the coronavirus, 895 completed surveys. Data collected Oct 9-11, 2020)

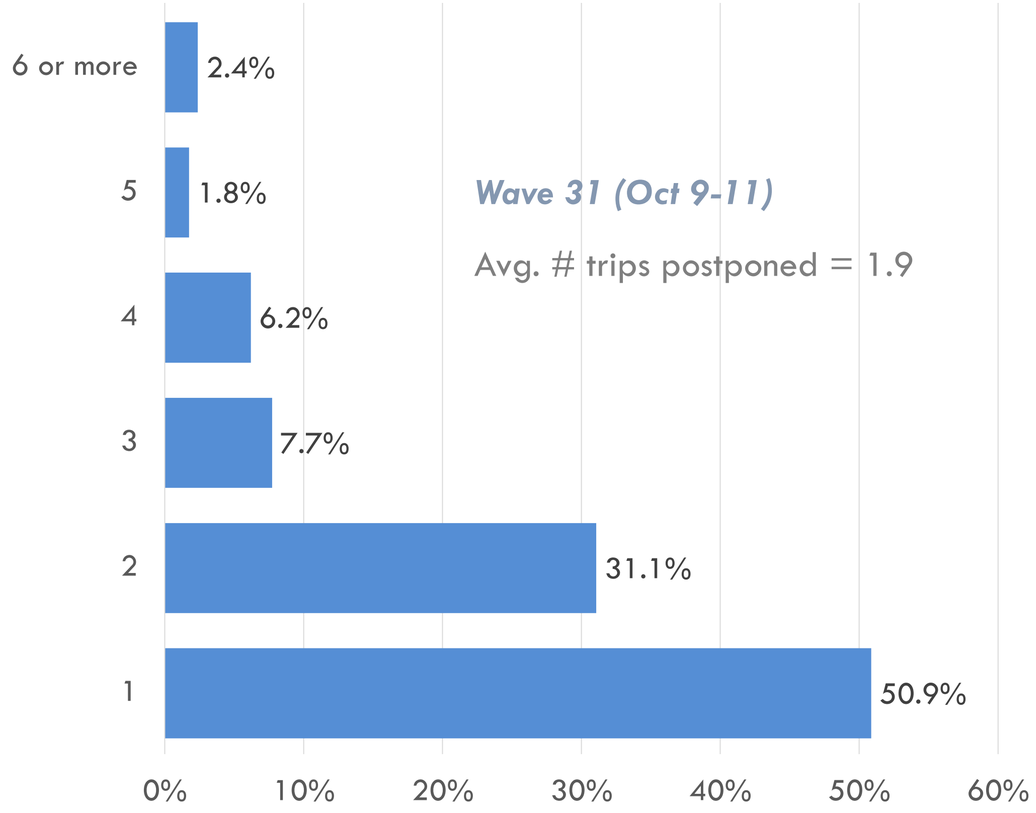


TRIPS CANCELLED/POSTPONED

Question: How many trips did you cancel?



Question: How many trips did you postpone?

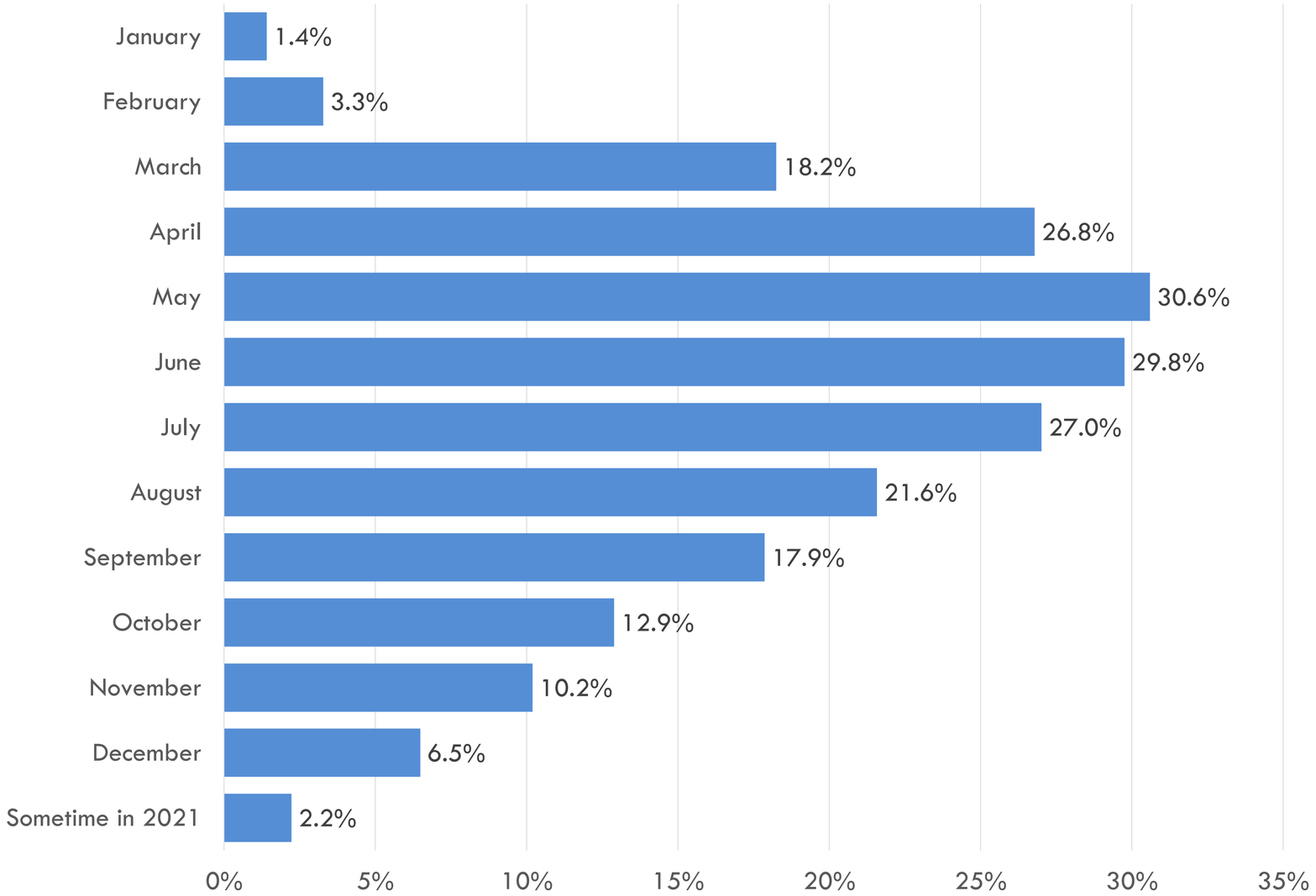


(Base: Wave 31 data. Respondents cancelling/postponing a trip, 637/477 completed surveys. Data collected Oct 9-11, 2020)

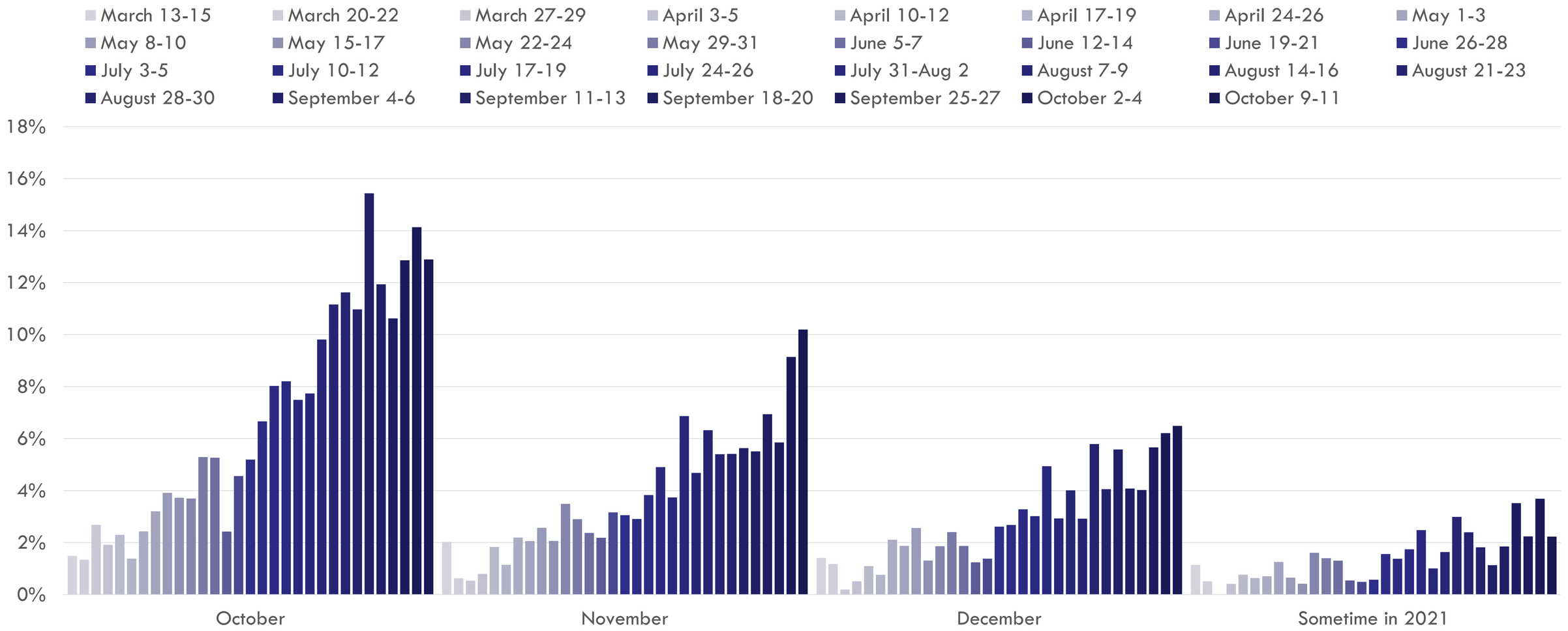
MONTH OF TRIP CANCELLATION

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

(Base: Wave 31 data. Respondents cancelling a trip, 637 completed surveys. Data collected Oct 9-11, 2020)



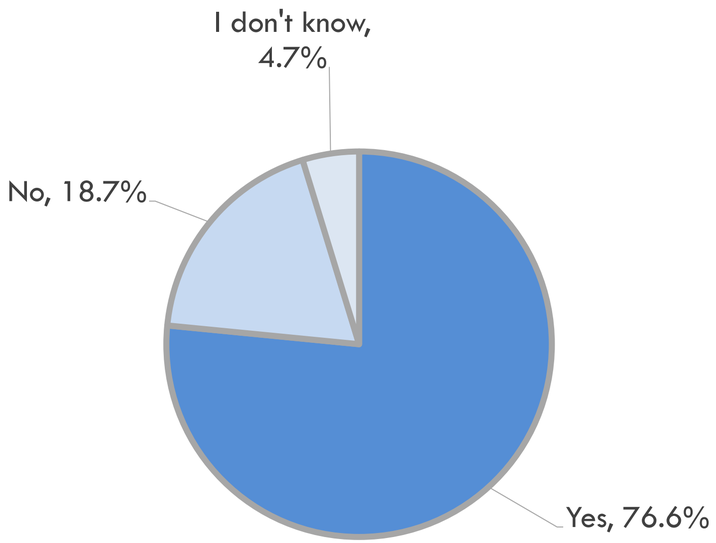
MONTH OF TRIP CANCELLATION



(Base: Waves 1-31. 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, 619, 649, 639 and 637 completed surveys.)

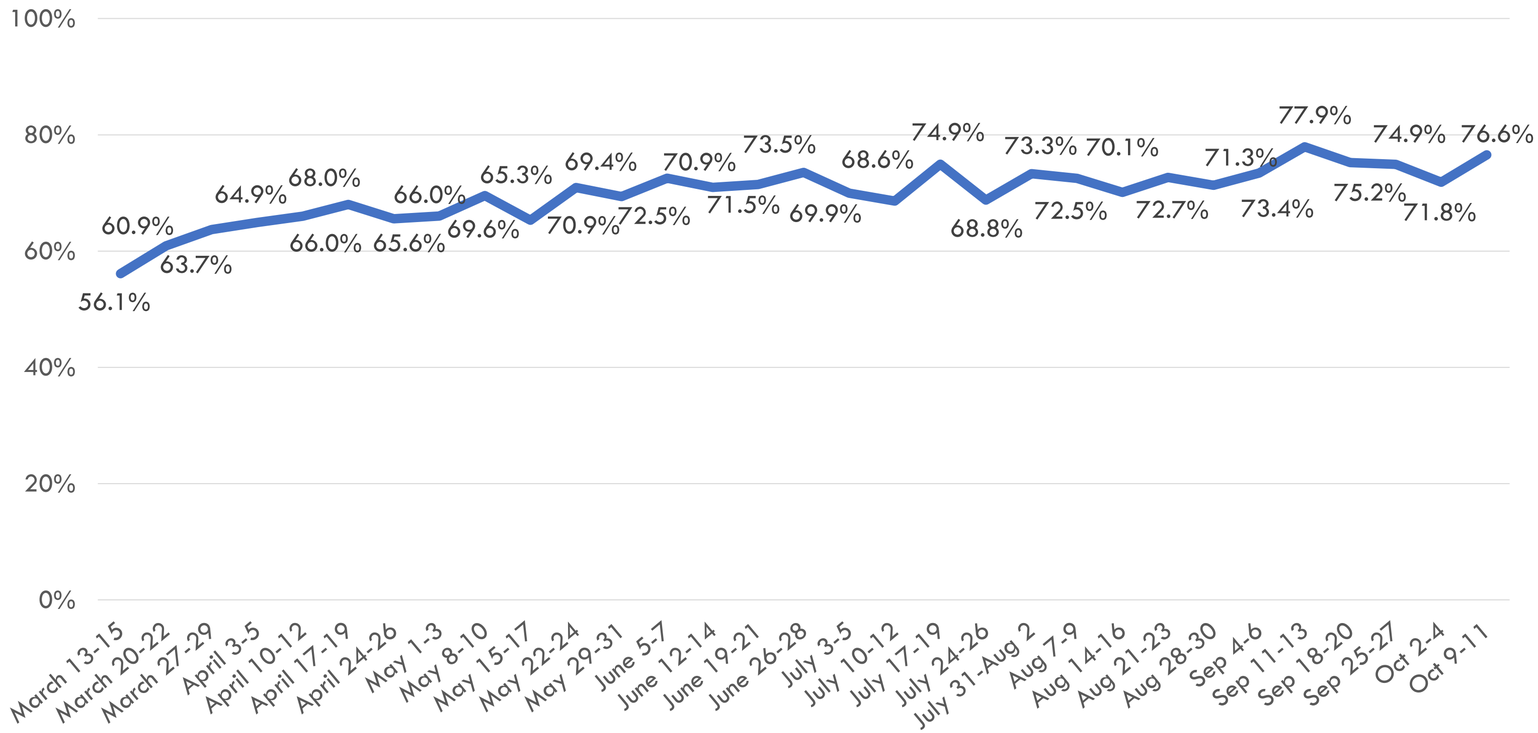
DID TRAVELER GET FULL REFUNDS?

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



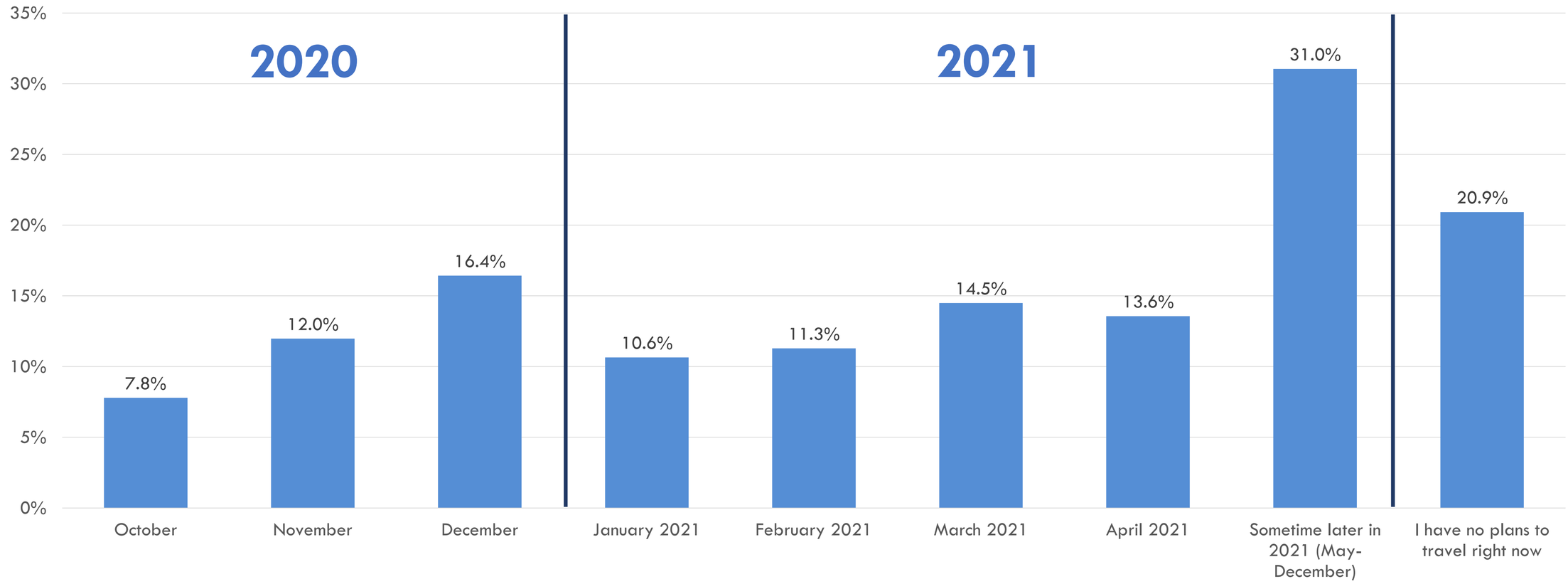
(Base: Wave 31 data. Respondents cancelling a trip, 637 completed surveys. Data collected Oct 9-11, 2020)

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?**

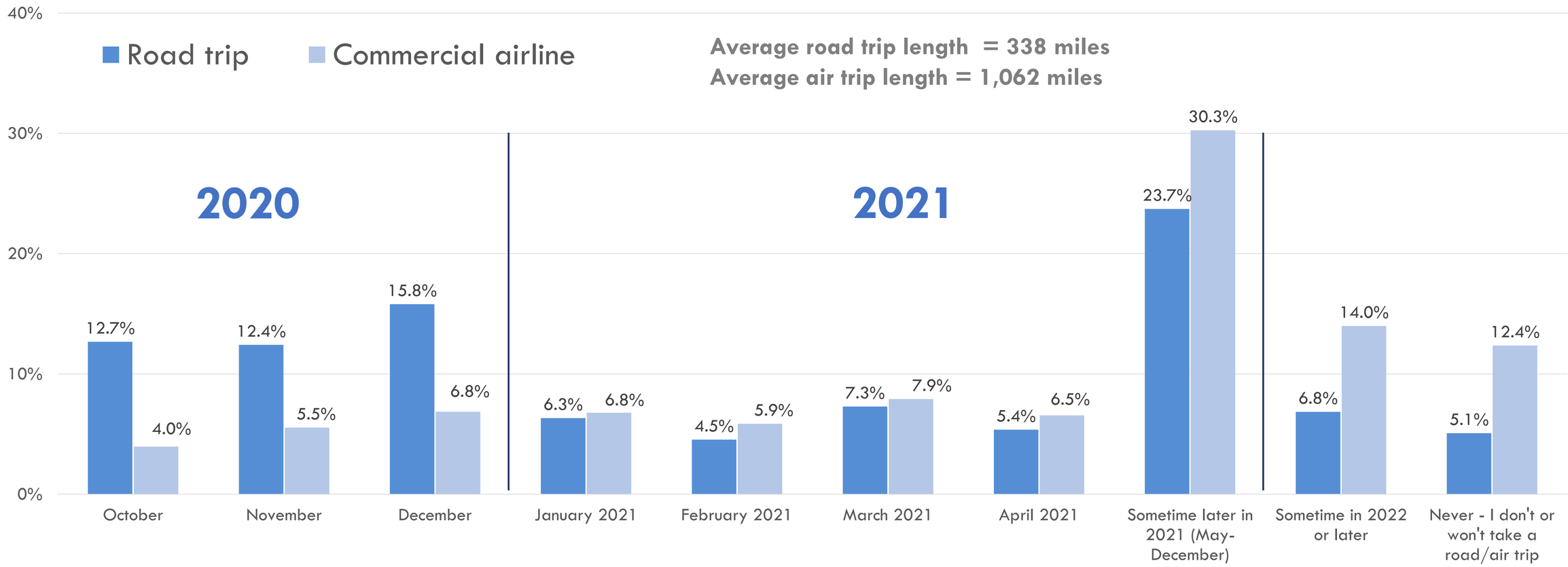


(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

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?

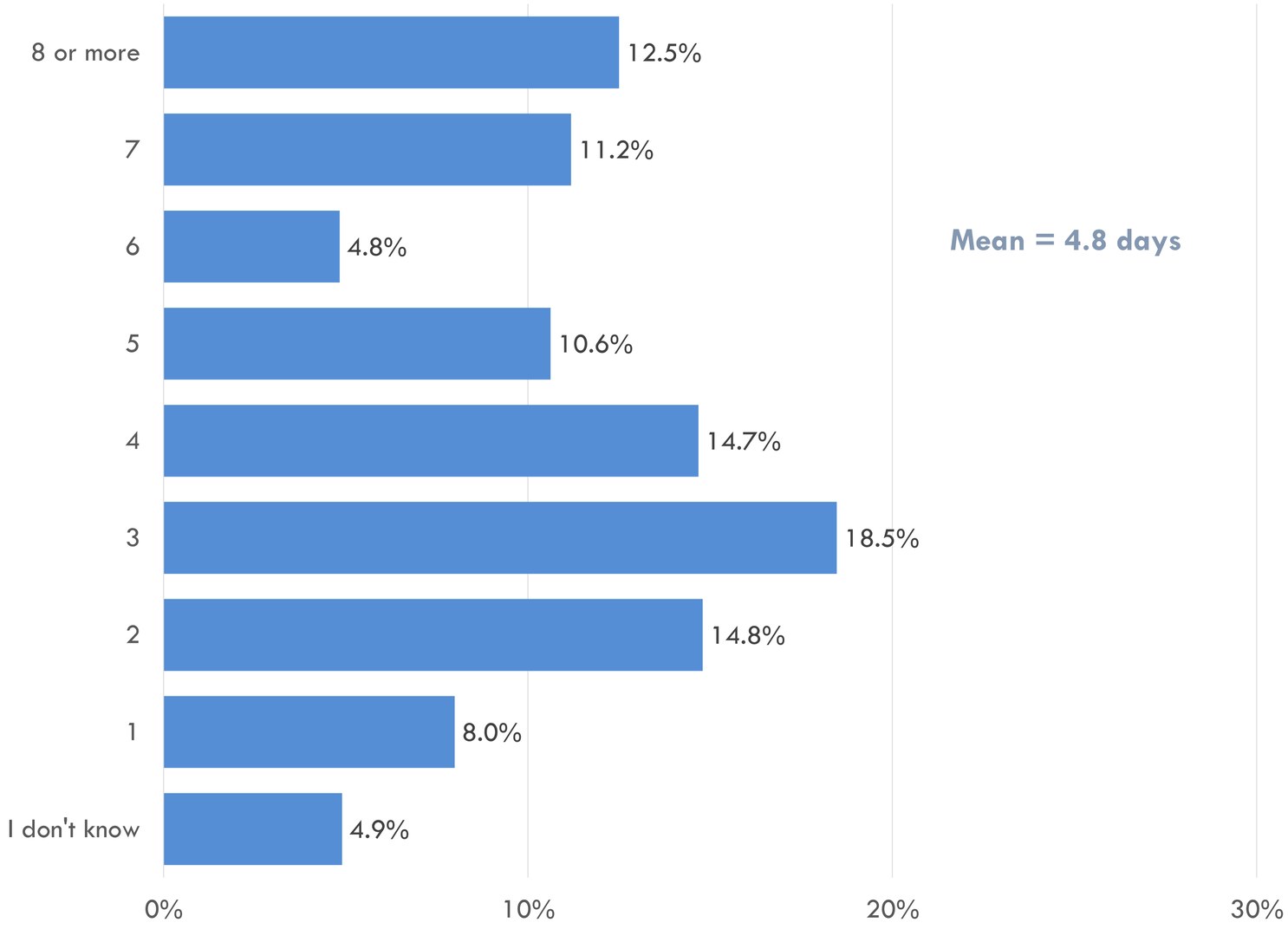


(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

LENGTH OF NEXT LEISURE TRIP

Question: On your next leisure trip, how many days away from home do you expect to spend? (Select one)

(Base: Wave 31 data. All respondents, 1,133 completed surveys. Data collected Oct 9-11, 2020)



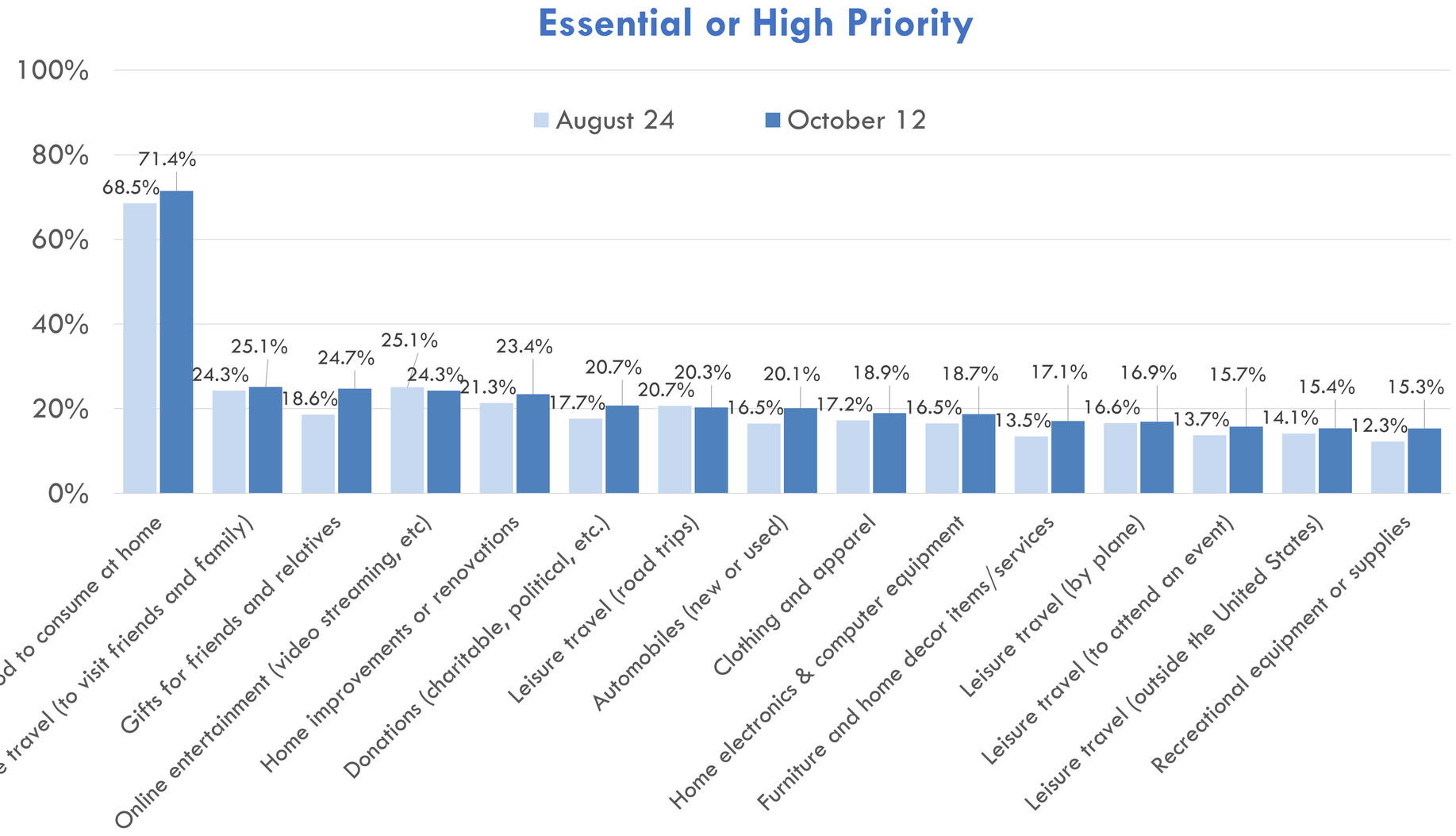
PRIORITIES IN THE NEXT 12 MONTHS

SPENDING PRIORITIES (NEXT 3 MONTHS)

Question: **Thinking now about how you will spend your disposable income during the next three months.**

Tell us about your spending priorities. However you personally define each, use the scale provided to indicate how you will prioritize these in the next THREE (3) MONTHS.

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

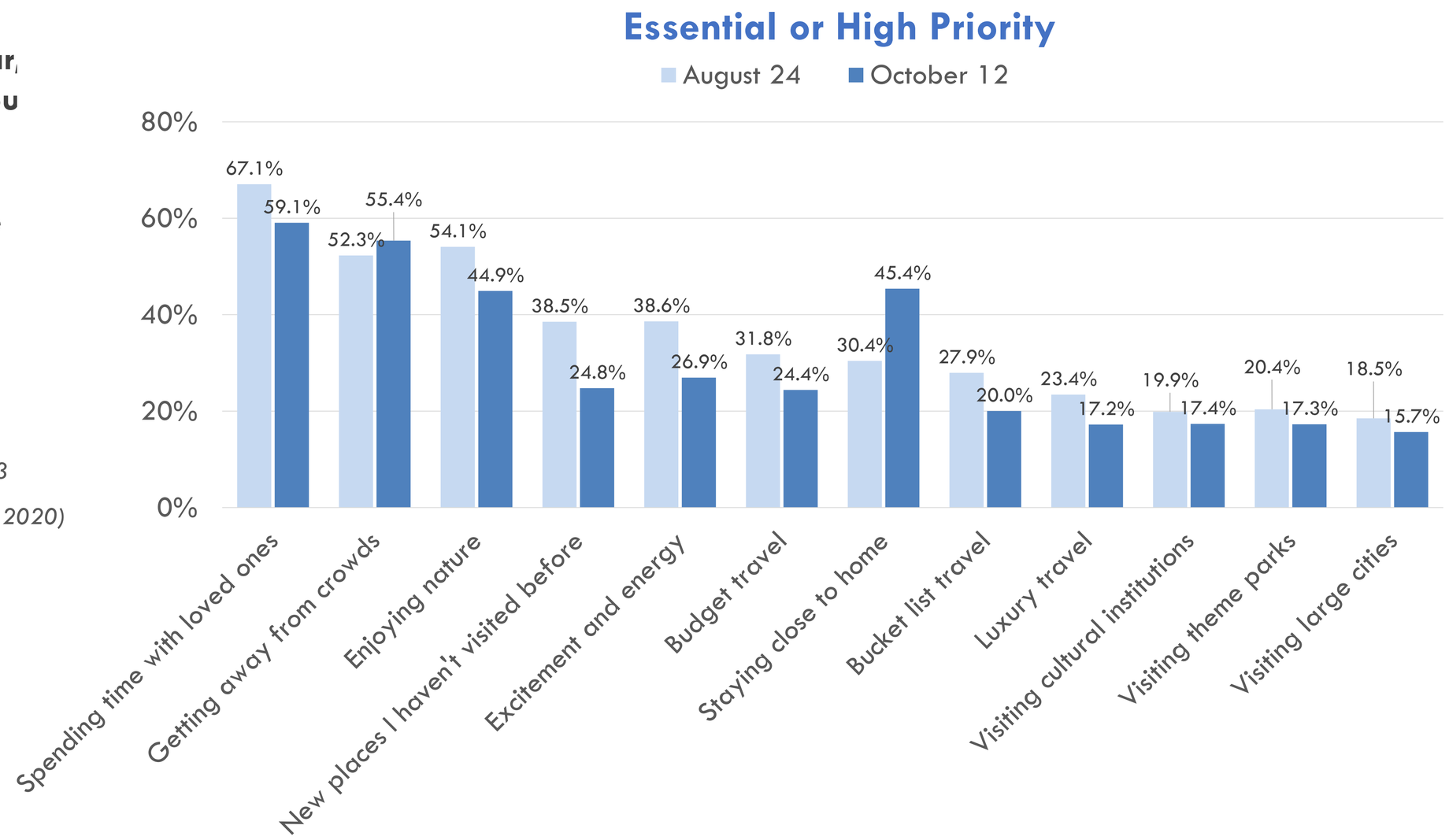


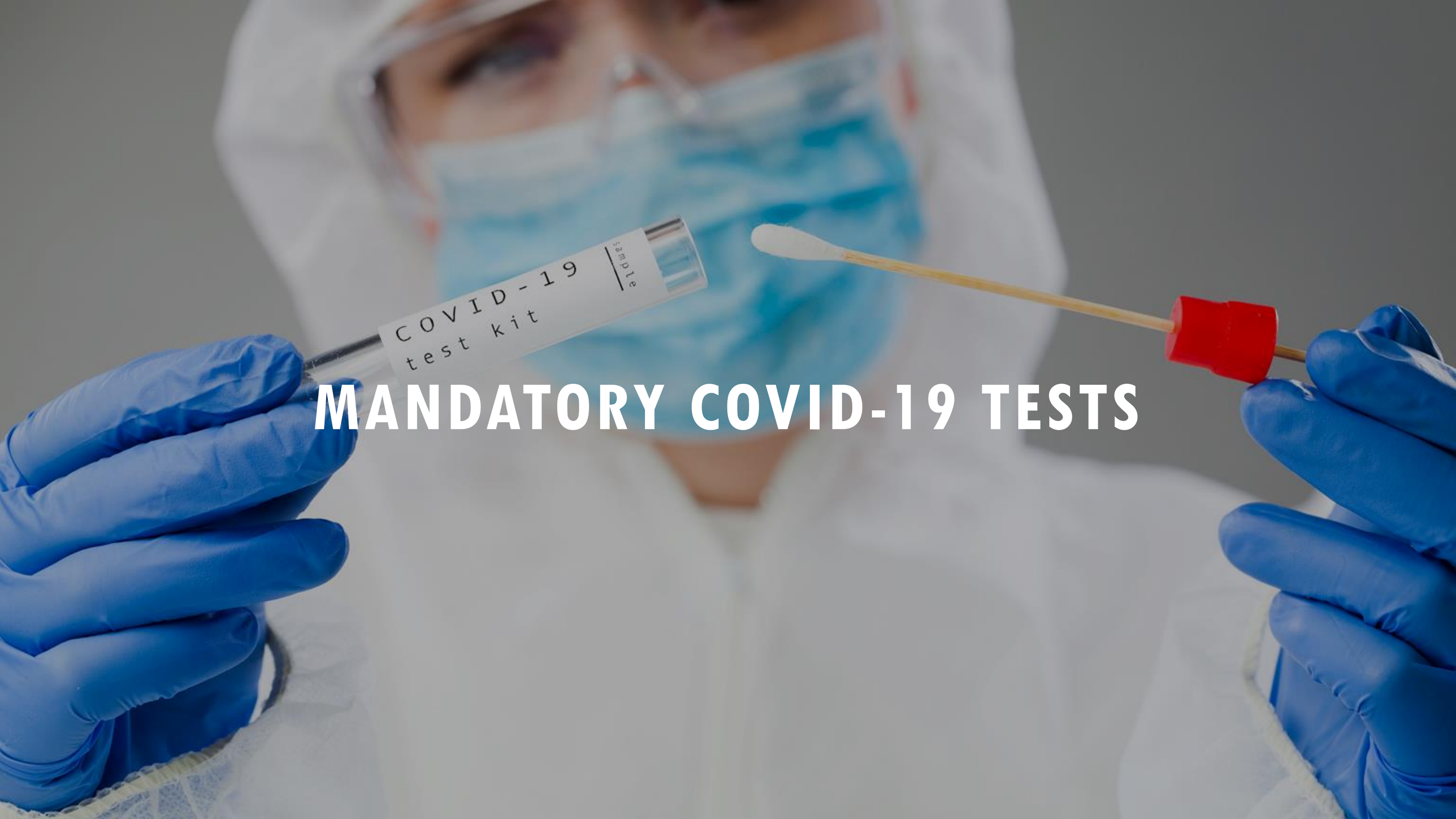
TRAVEL PRIORITIES (NEXT 12 MONTHS)

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

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

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



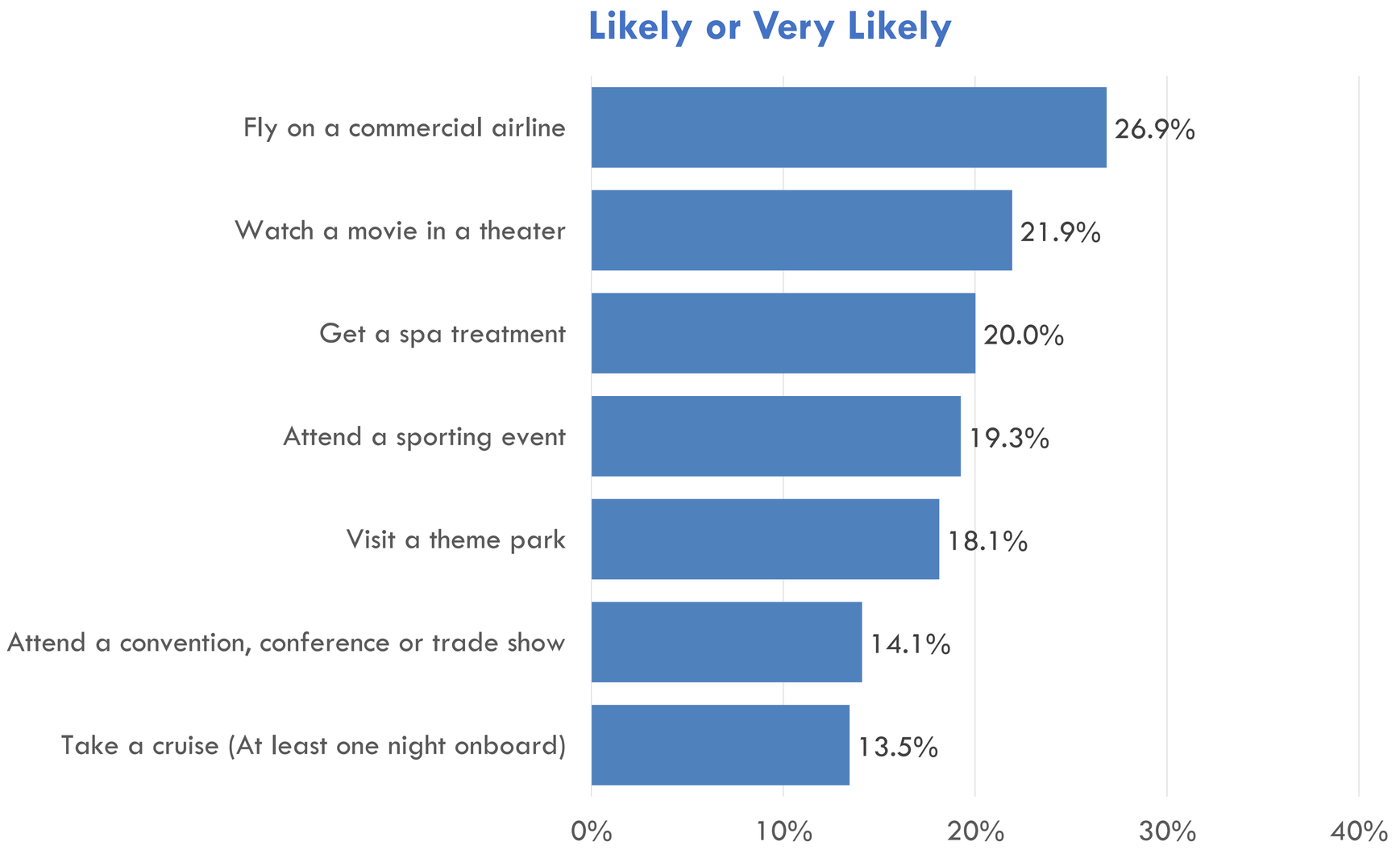


MANDATORY COVID-19 TESTS

TRAVEL BEHAVIORS IN NEXT THREE MONTHS

Question: How likely are you to do each of the following in the next THREE (3) MONTHS?

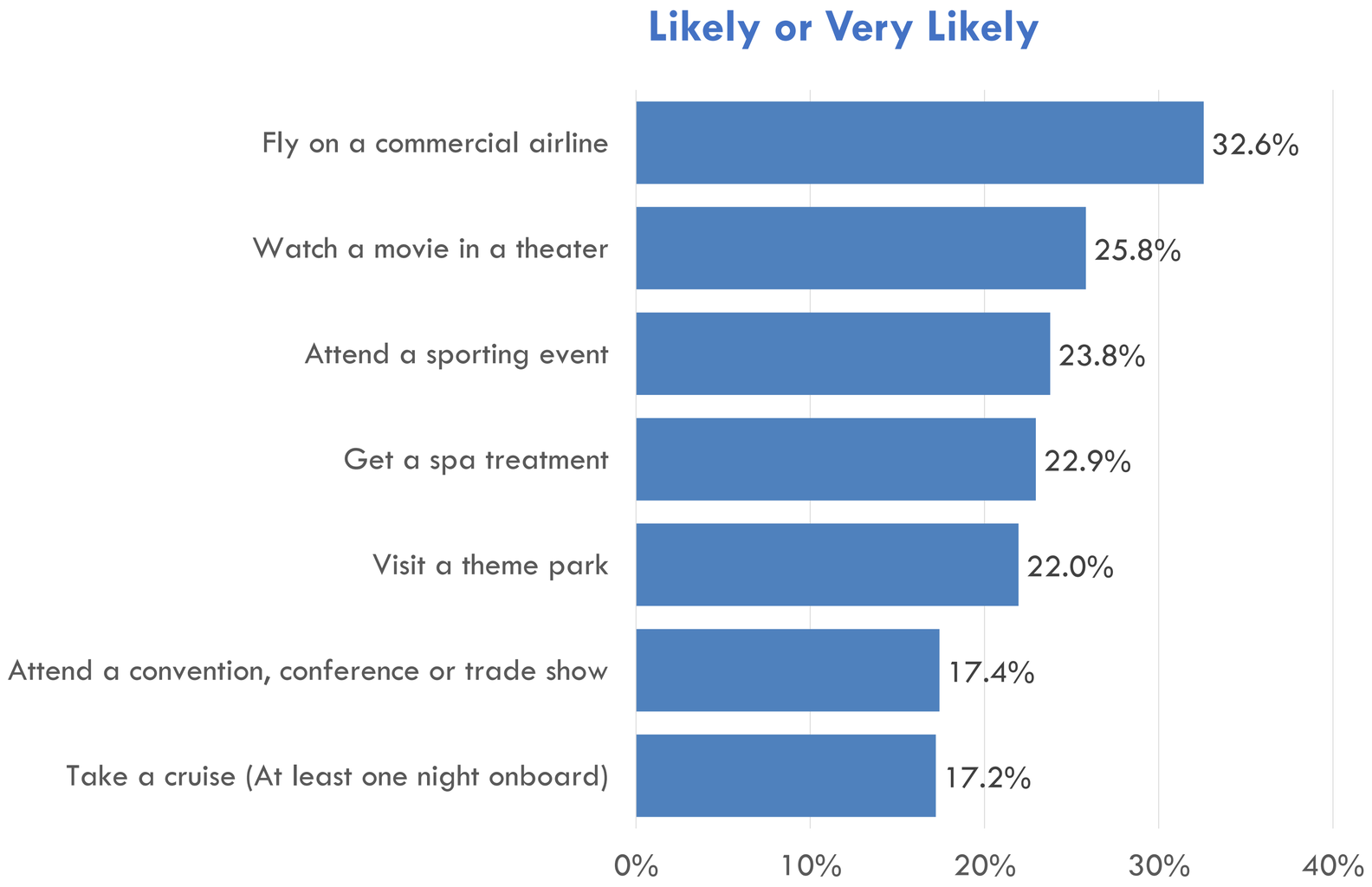
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 202(



MANDATORY COVID TESTS' IMPACT ON TRAVEL BEHAVIORS

Question: If all customers were required to pass a COVID-19 test prior to entry, how likely would you be to do each in the next THREE (3) MONTHS?

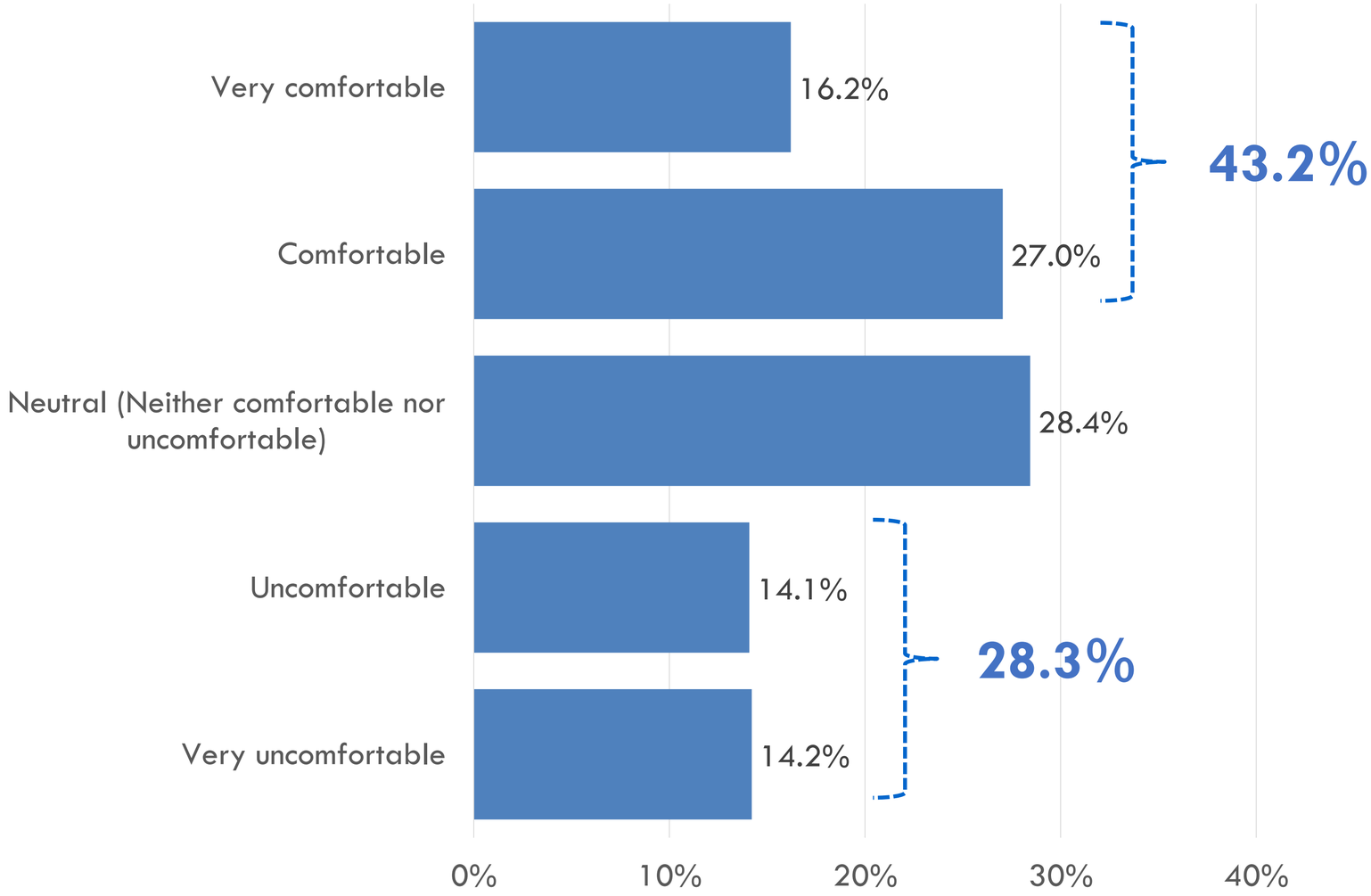
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



MANDATORY TESTS AND COMFORT WITH AIR TRAVEL

Question: If a commercial airline required all passengers to take a COVID-19 test prior to boarding the plane, how comfortable would you be taking a flight? (Select one)

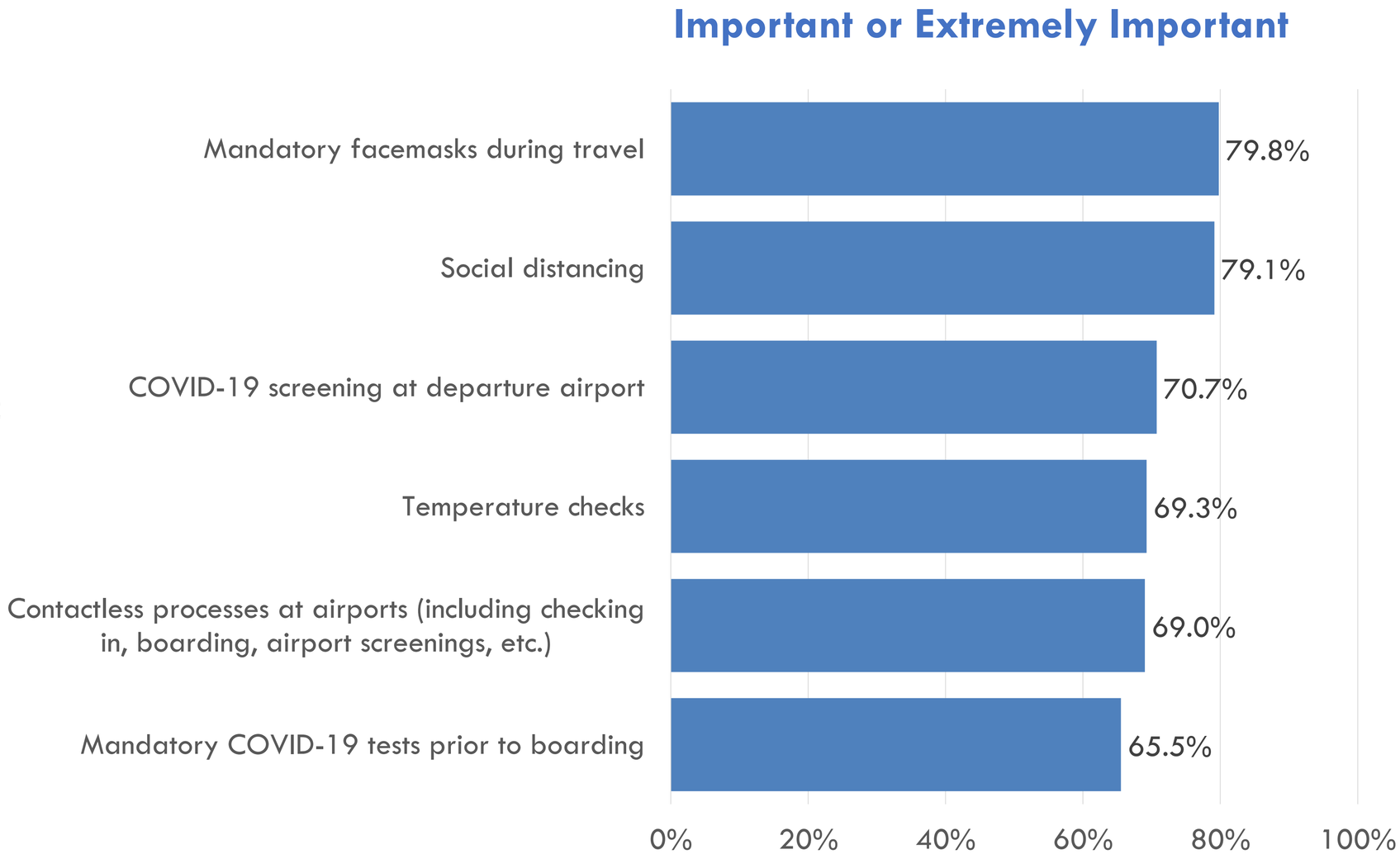
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



IMPORTANCE TO TAKING A FLIGHT

Question: How important would each of the following be to getting you to take a flight on a commercial airline in the NEXT SIX (6) MONTHS?

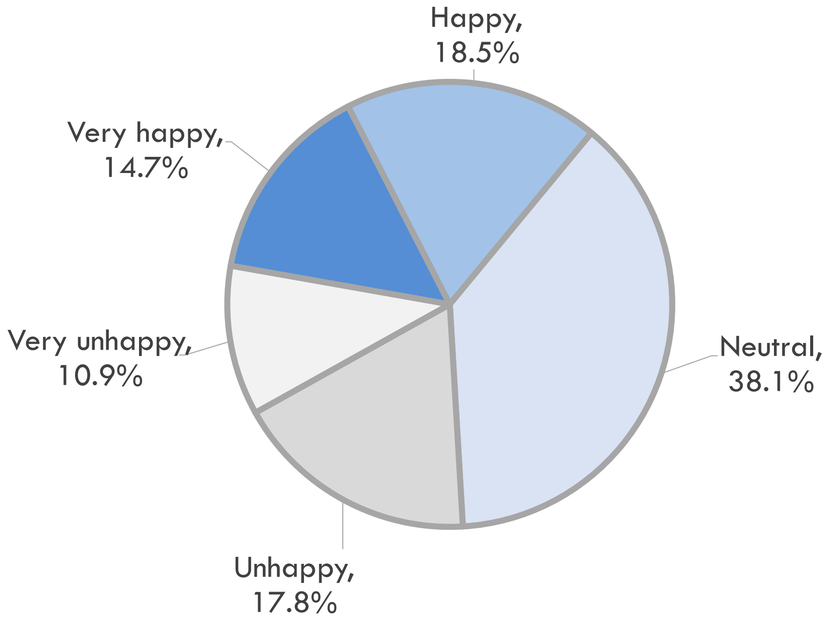
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020



ADVERTISING IN THE TIME OF COVID

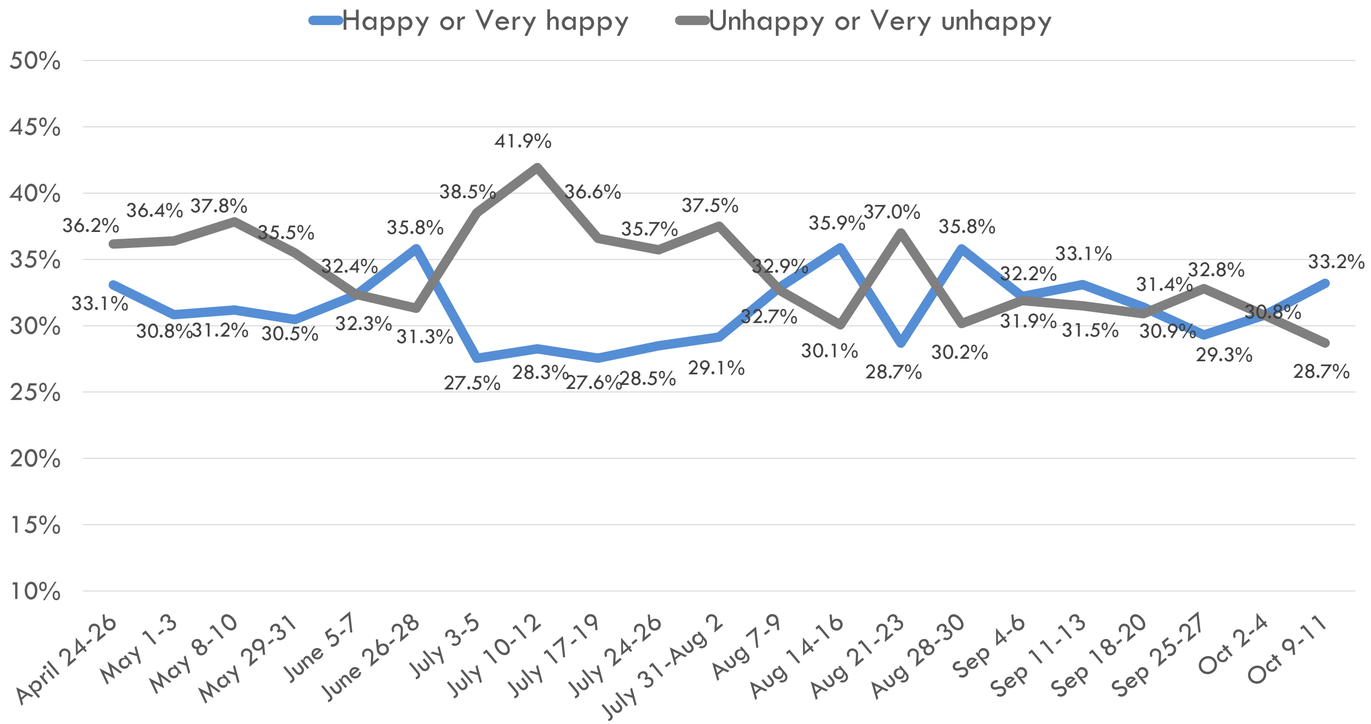
FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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 16-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

Historical data

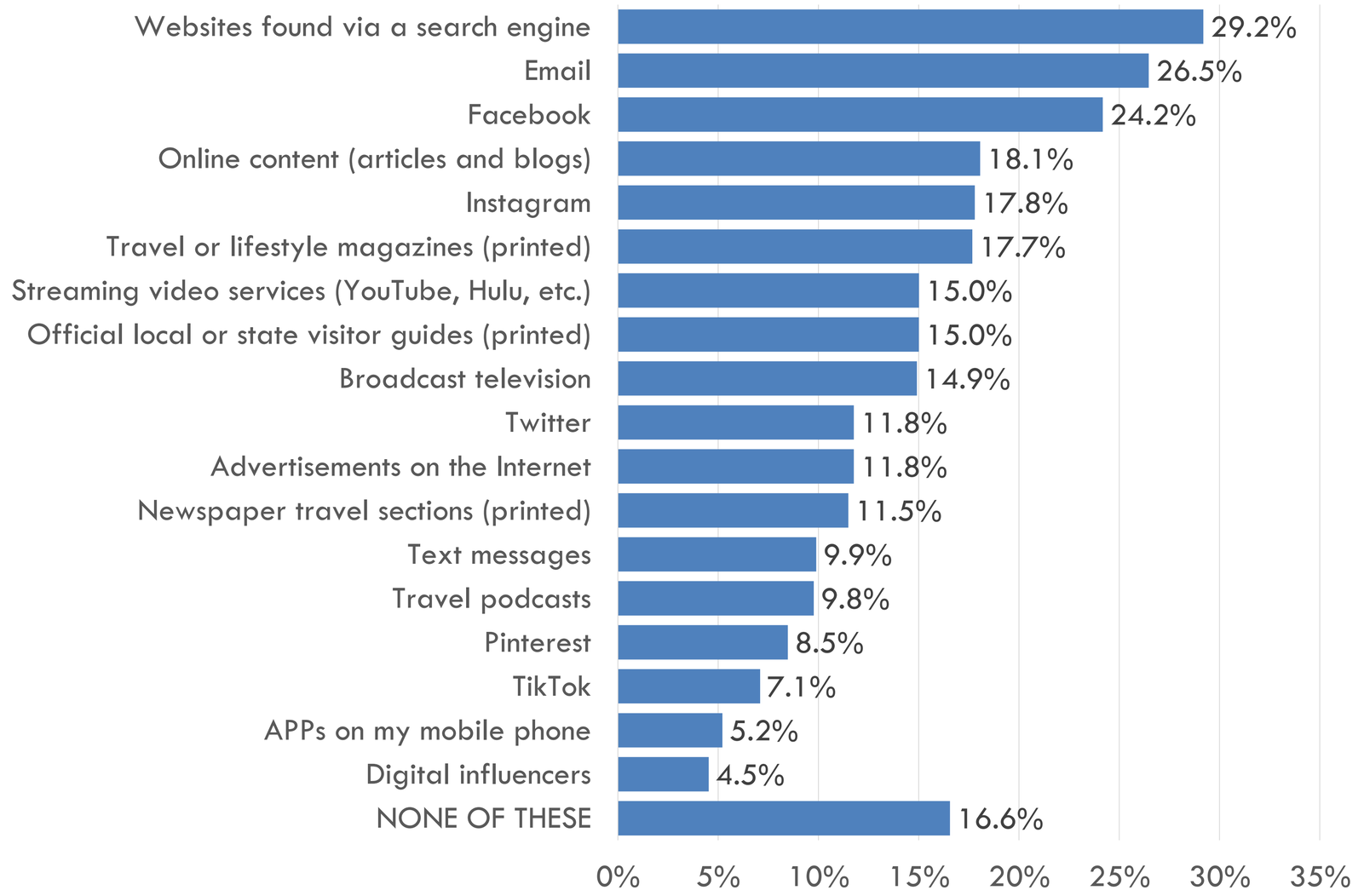


BEST WAYS TO REACH TRAVELERS NOW

Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

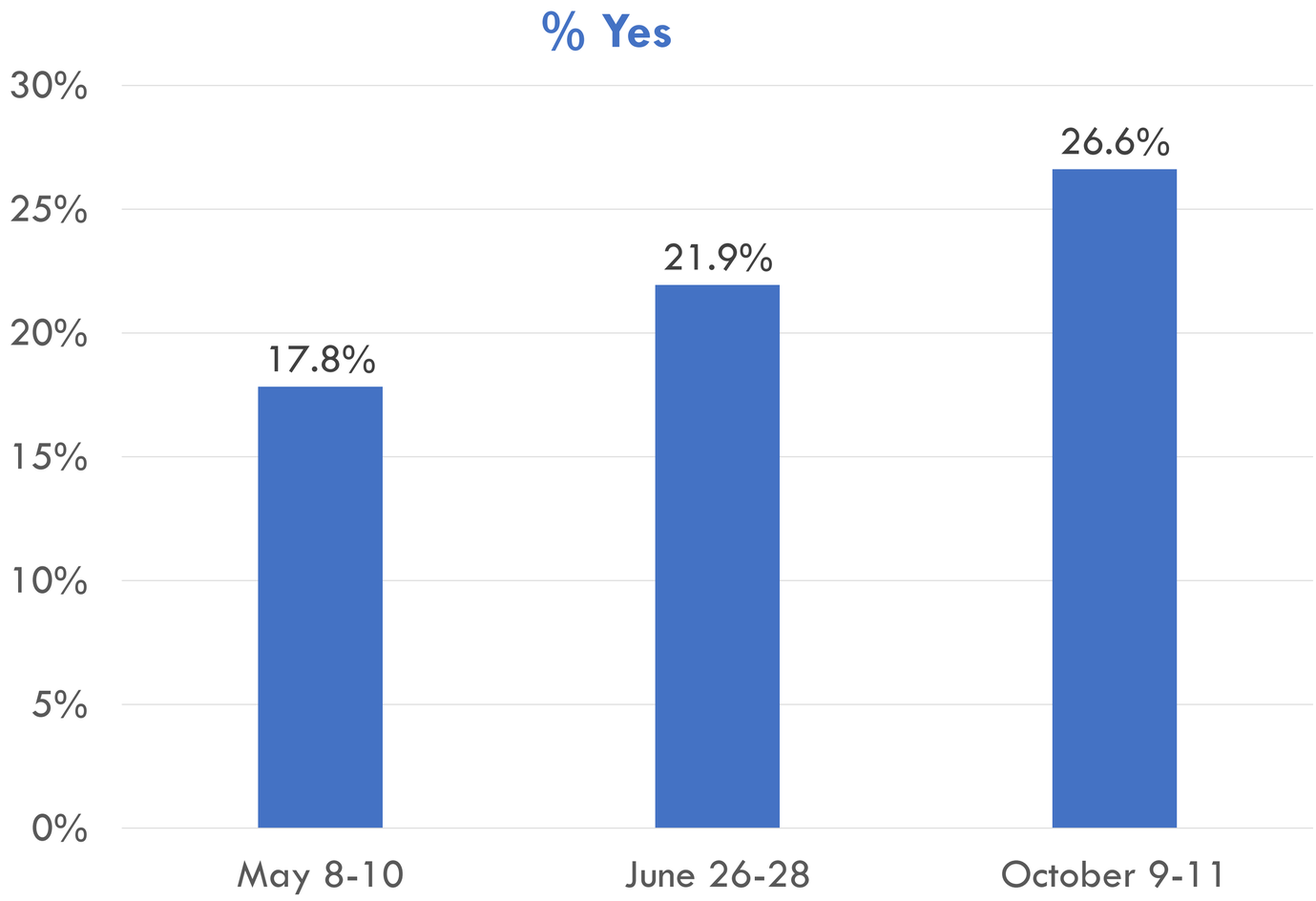
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



RECALL OF TRAVEL ADVERTISEMENTS

Question: Do you recall seeing any specific advertisements for any travel destinations in the past month?

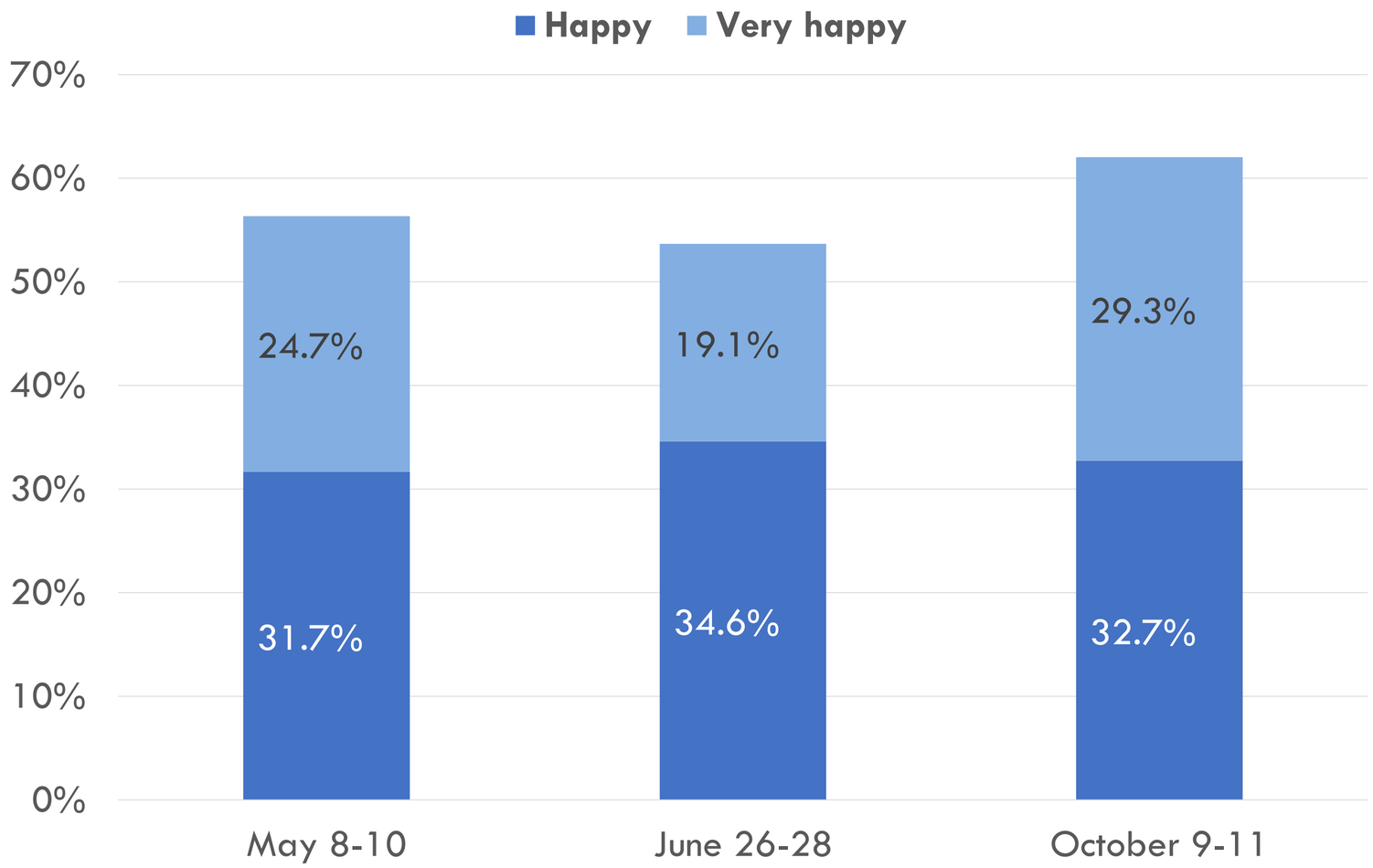
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



FEELINGS GENERATED BY TRAVEL ADVERTISEMENTS

Question: Please think about the most recent travel destination advertisement you saw. In general, how did that advertisement make you feel?

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

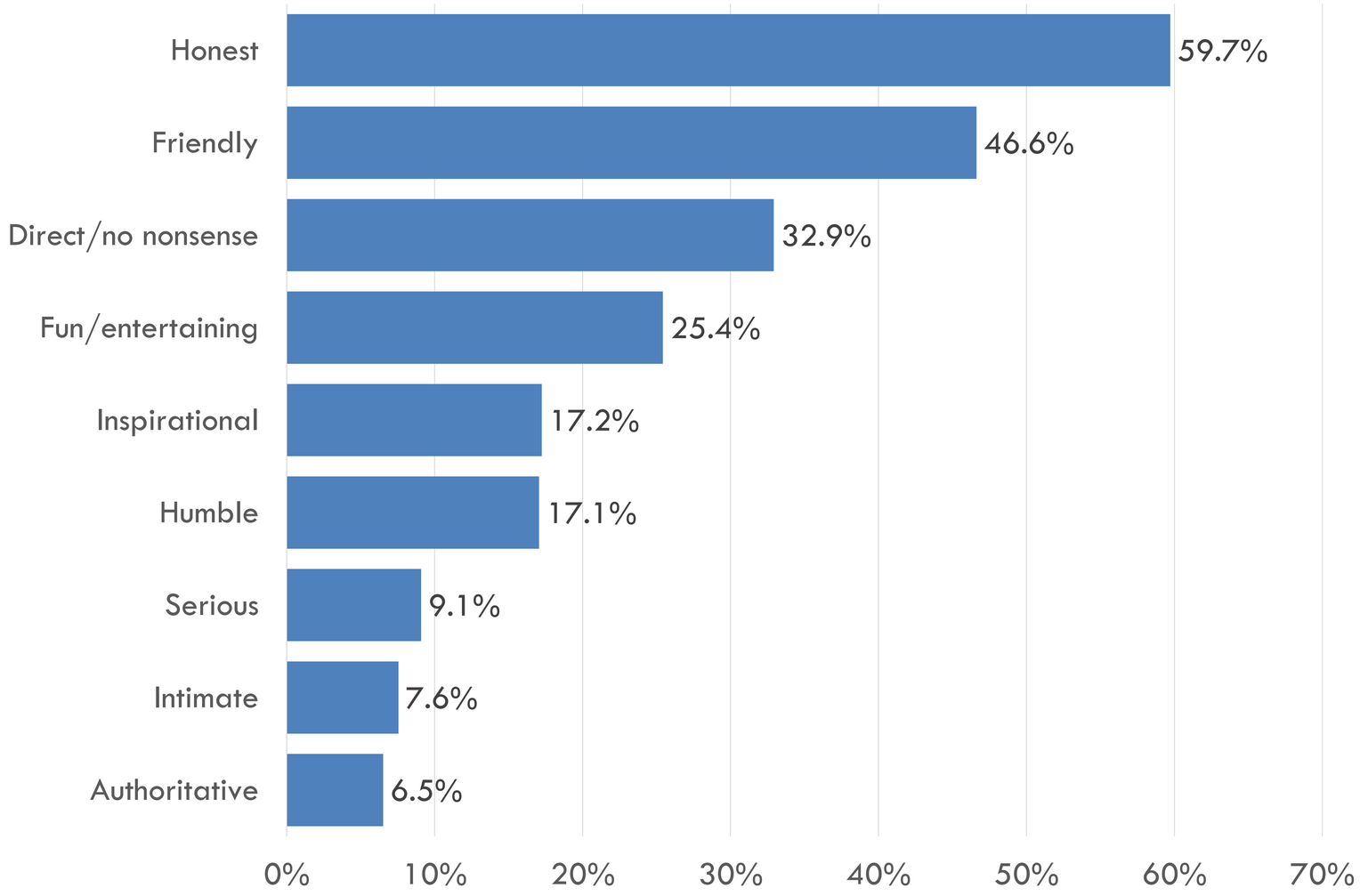


PREFERRED TONES IN TRAVEL ADVERTISEMENTS

Question: Think about advertisements for travel destinations.

How would you like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now? (Select at most 3)

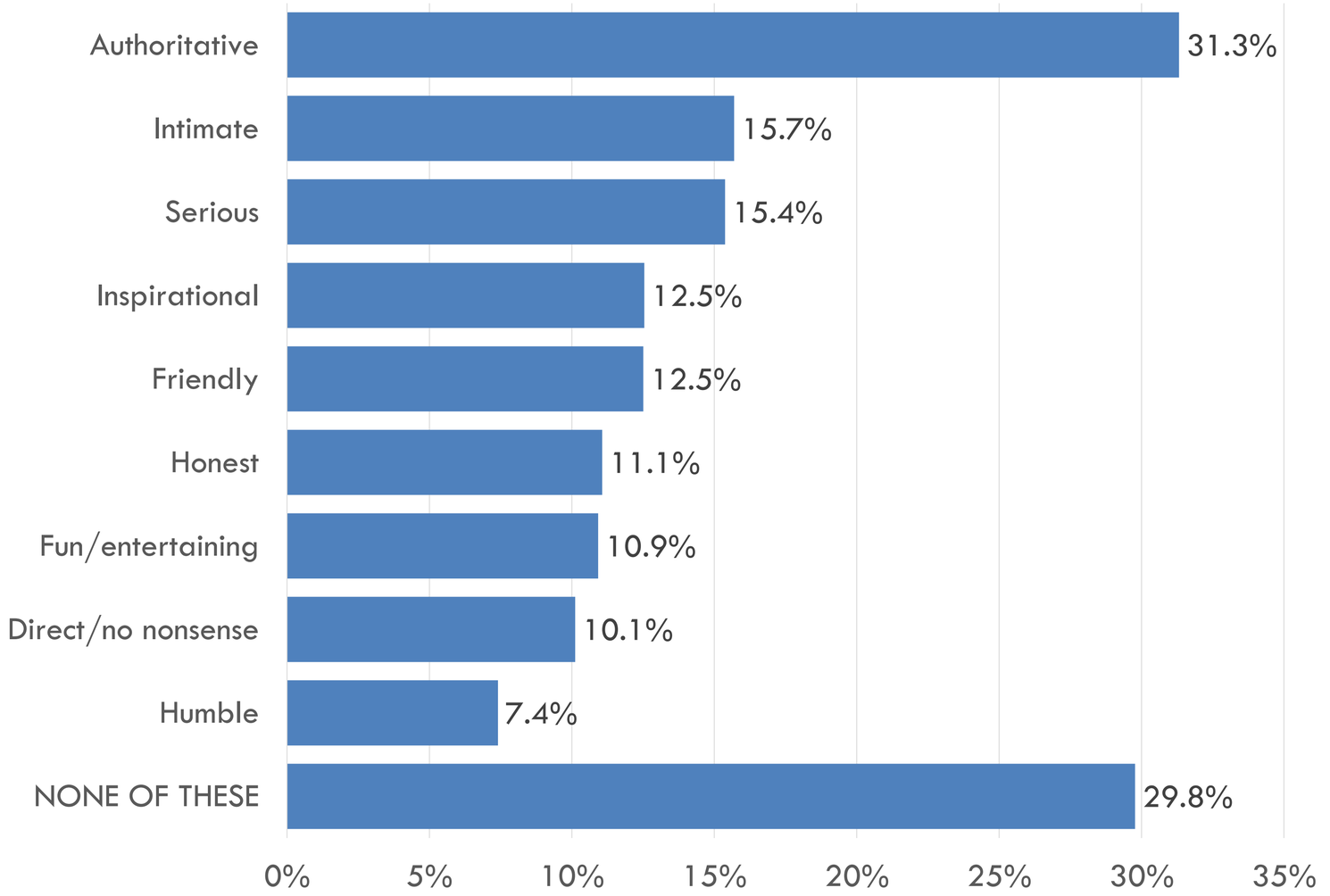
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



TURN-OFFS IN TRAVEL ADVERTISEMENTS

Question: Would any of these tones (if used by a travel destination) turn you off? (Select all that apply)

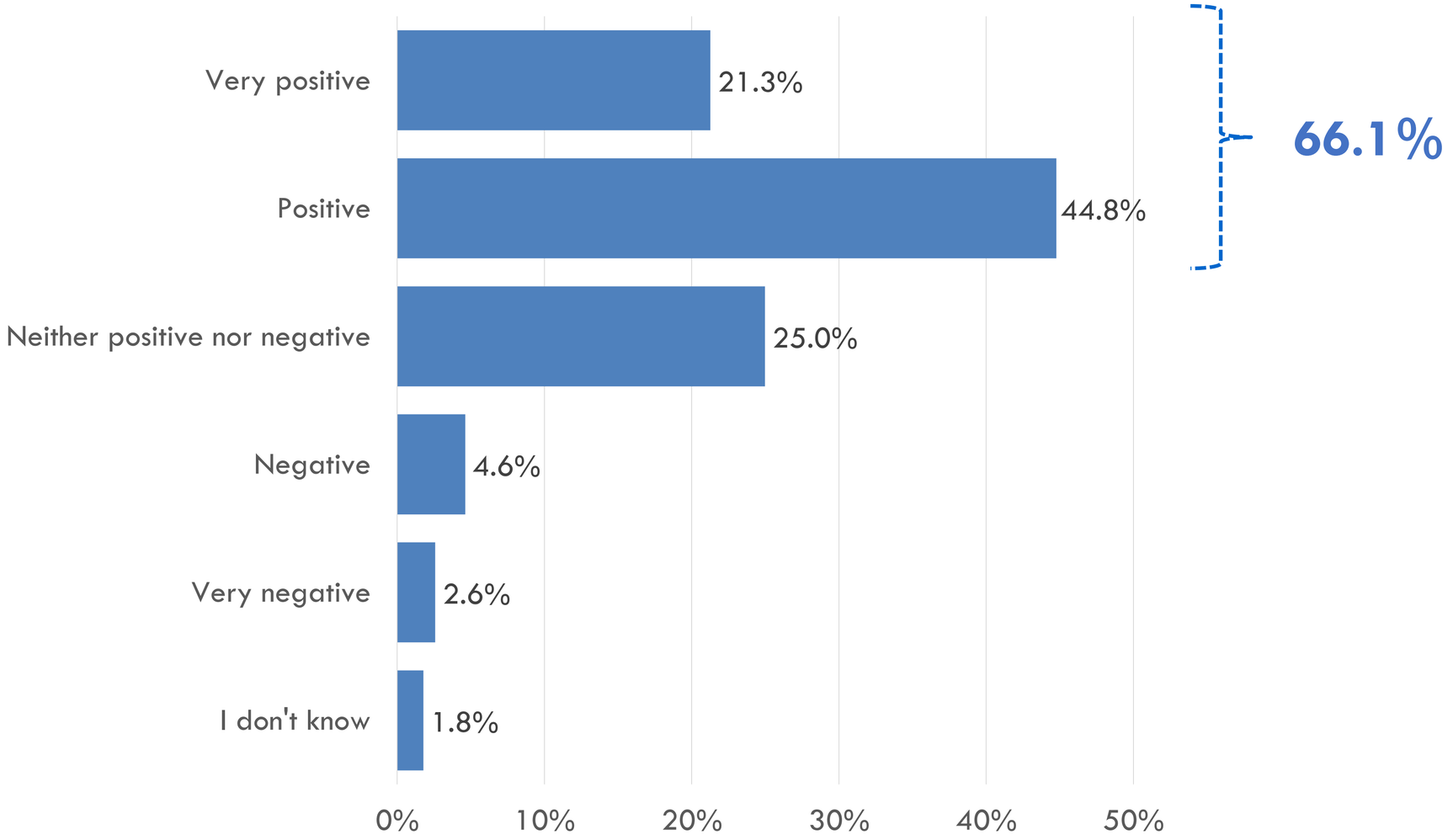
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



FIRST REACTION TO DENVER VIDEO ADVERTISEMENT

Question: Which best describes your first reaction to this advertisement?

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

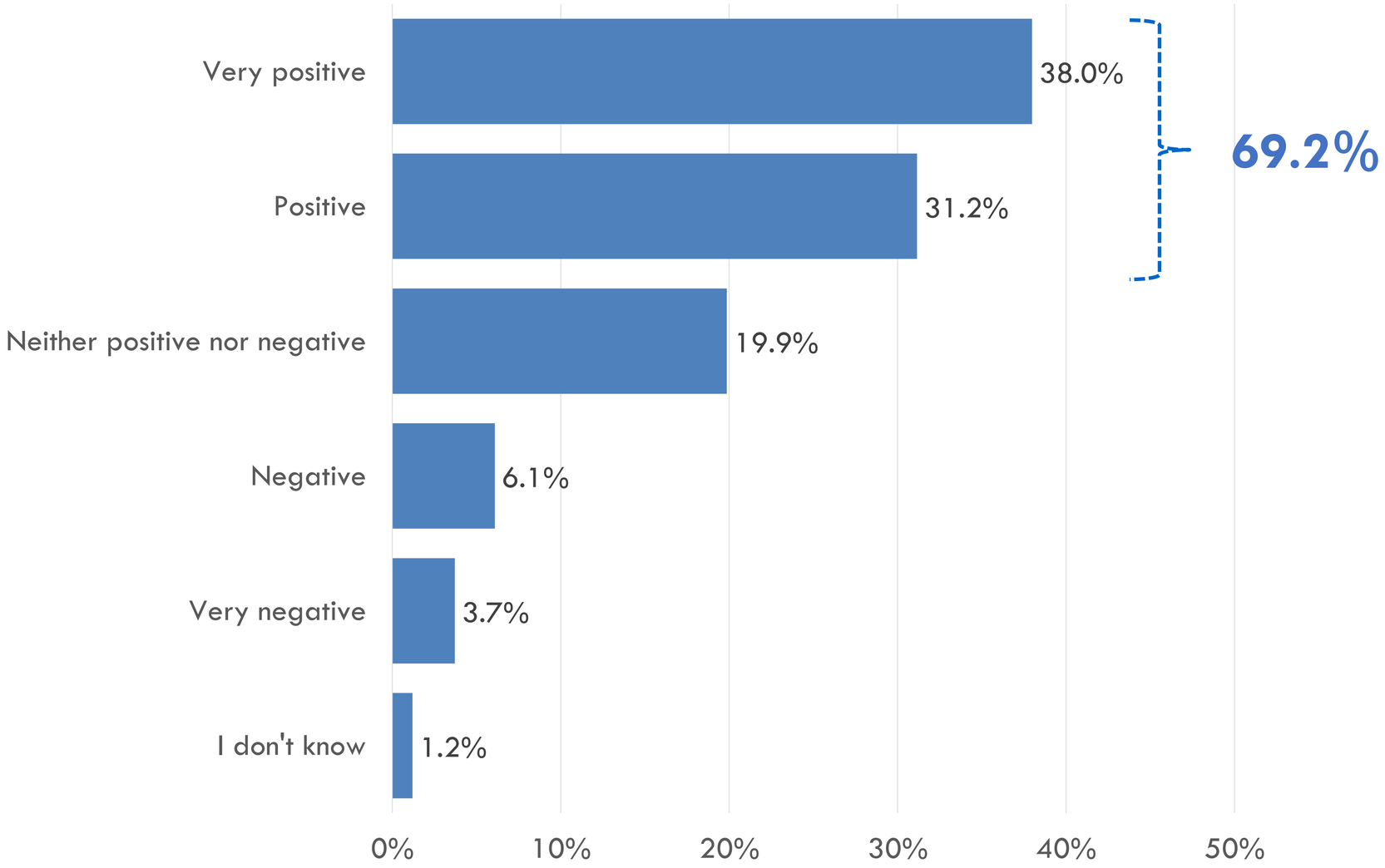


OPINIONS OF FACE MASKS IN TRAVEL ADVERTISEMENTS

Question: The people appearing in this advertisement were wearing masks.

Which best describes how you feel about use of masks in this advertisement?

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

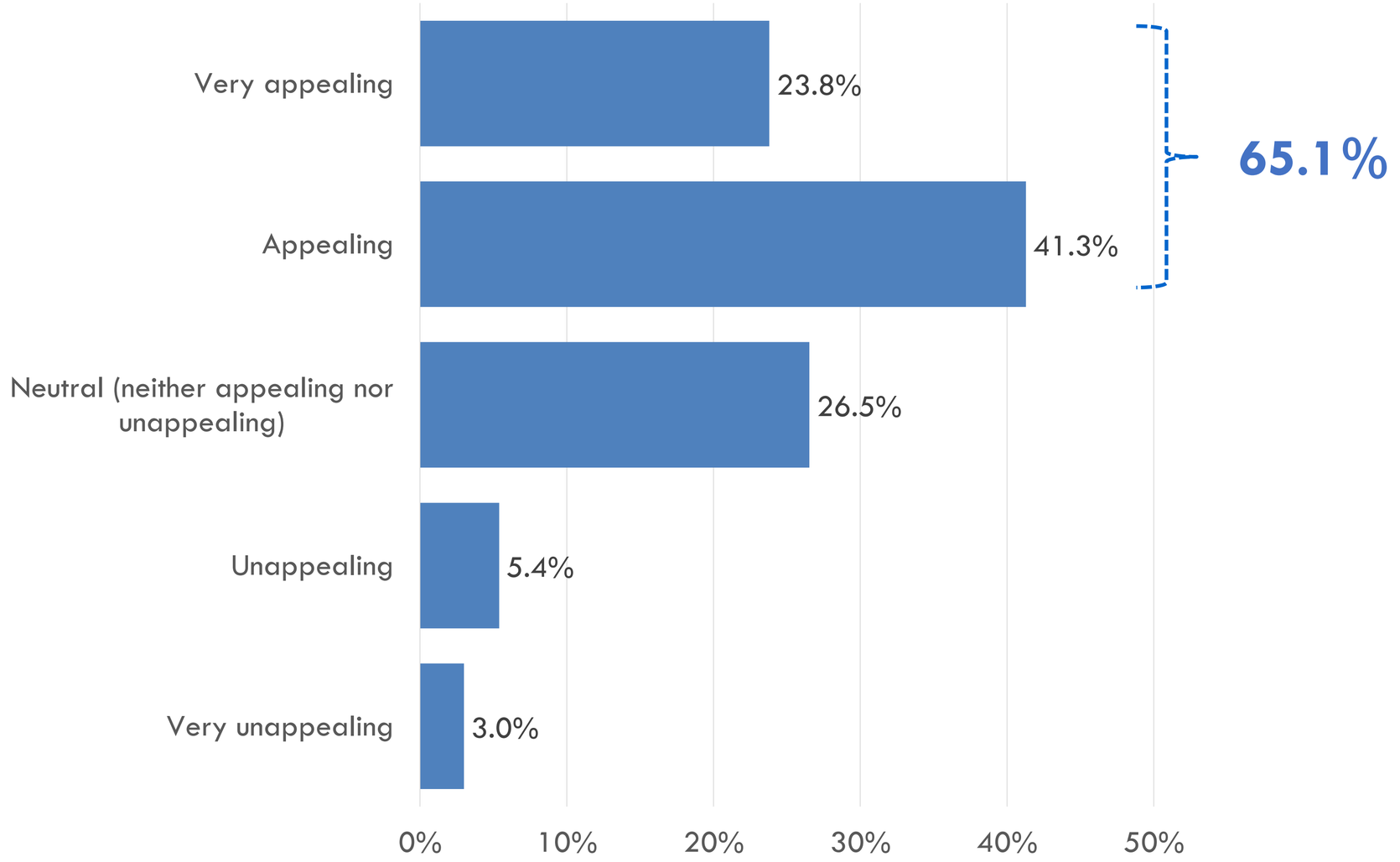


OPINIONS ON OUTDOOR MESSAGING IN TRAVEL ADVERTISEMENTS

Question: The advertisement describes Denver as having "more room," being "open" and as an "outdoor city."

In this time of COVID-19, how do you find this particular messaging?

(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)

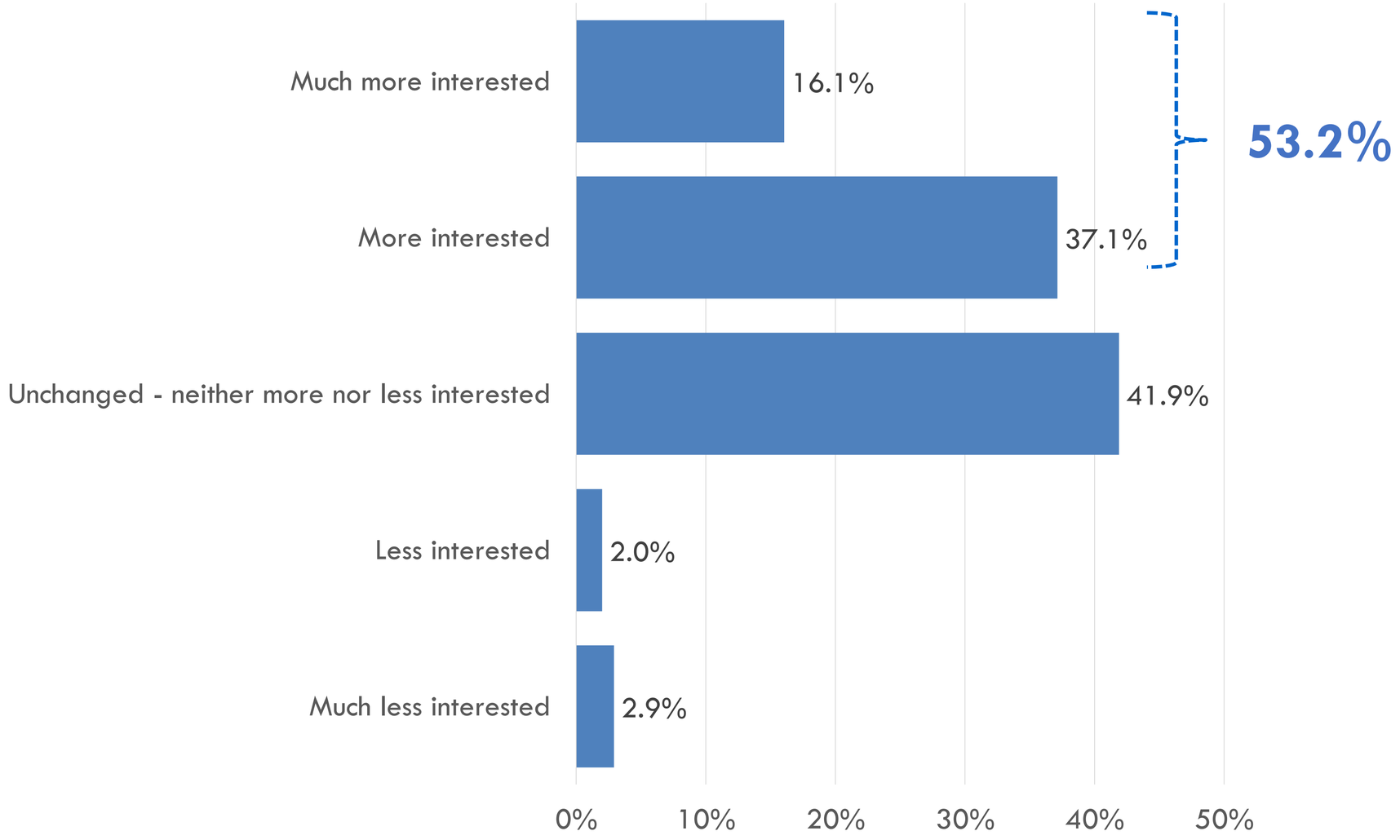


ADVERTISEMENT'S IMPACT ON INTEREST IN VISITATION

Question: Which best describes how this advertisement affected your interest in visiting Denver? (Select one to fill in the blank)

The advertisement makes me _____ in visiting Denver.

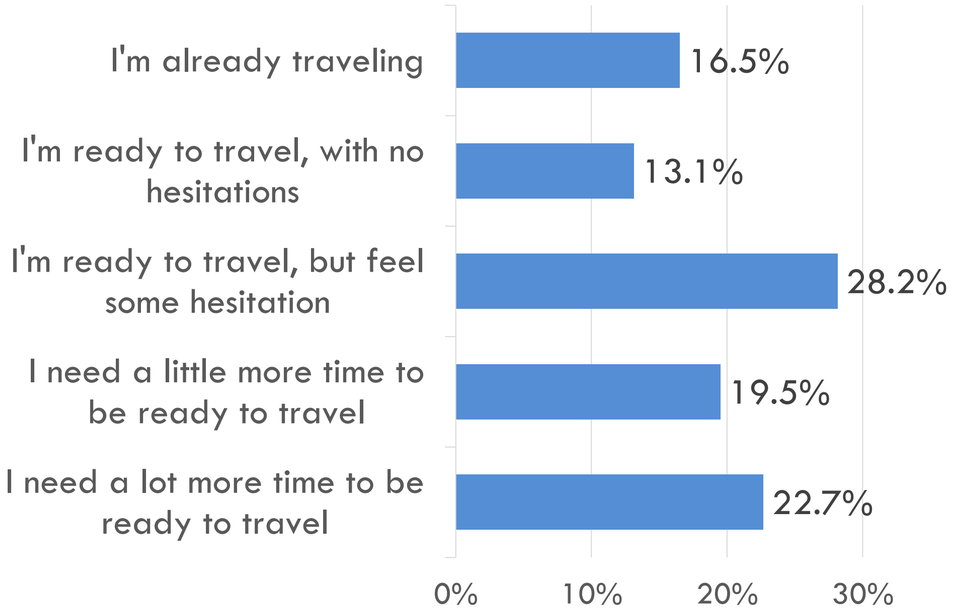
(Base: Wave 31 data. All respondents, 1,203 completed surveys. Data collected Oct 9-11, 2020)



OPINIONS ON TRAVEL & THE CORONAVIRUS

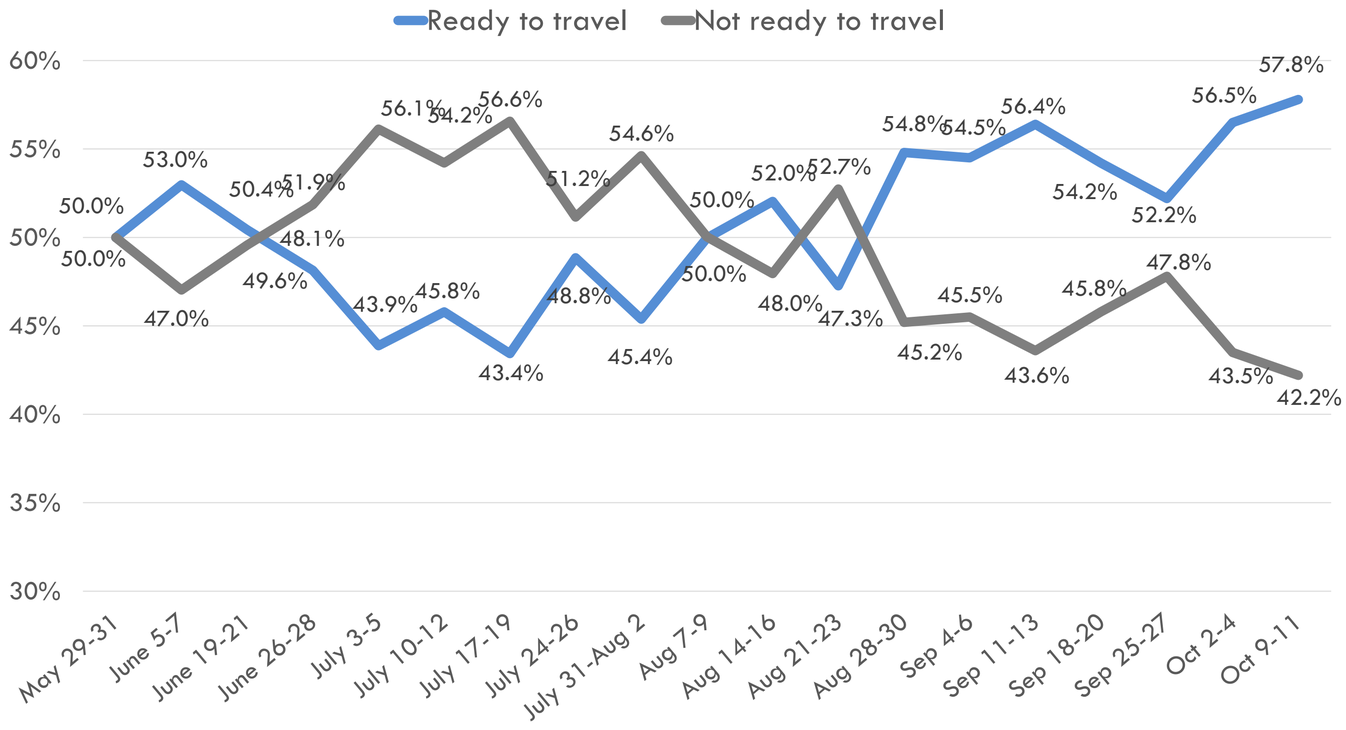
TRAVEL STATE-OF-MIND

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 15-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

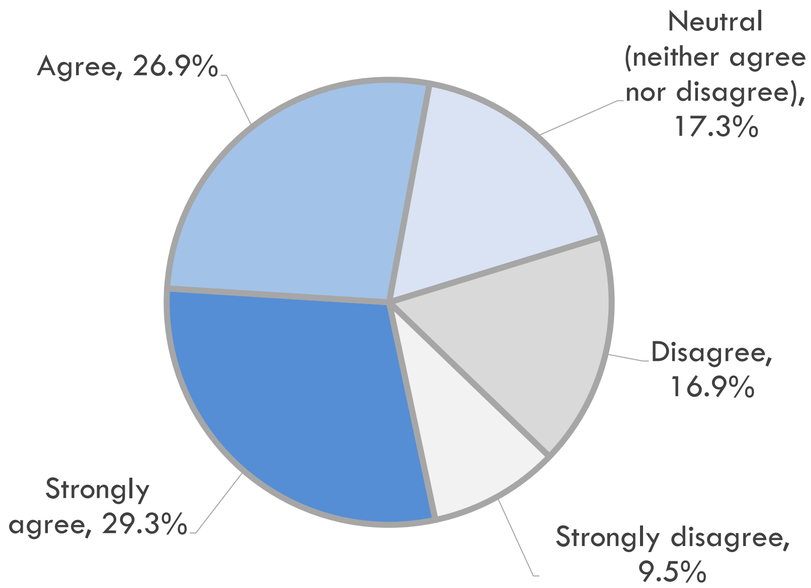
Historical data



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

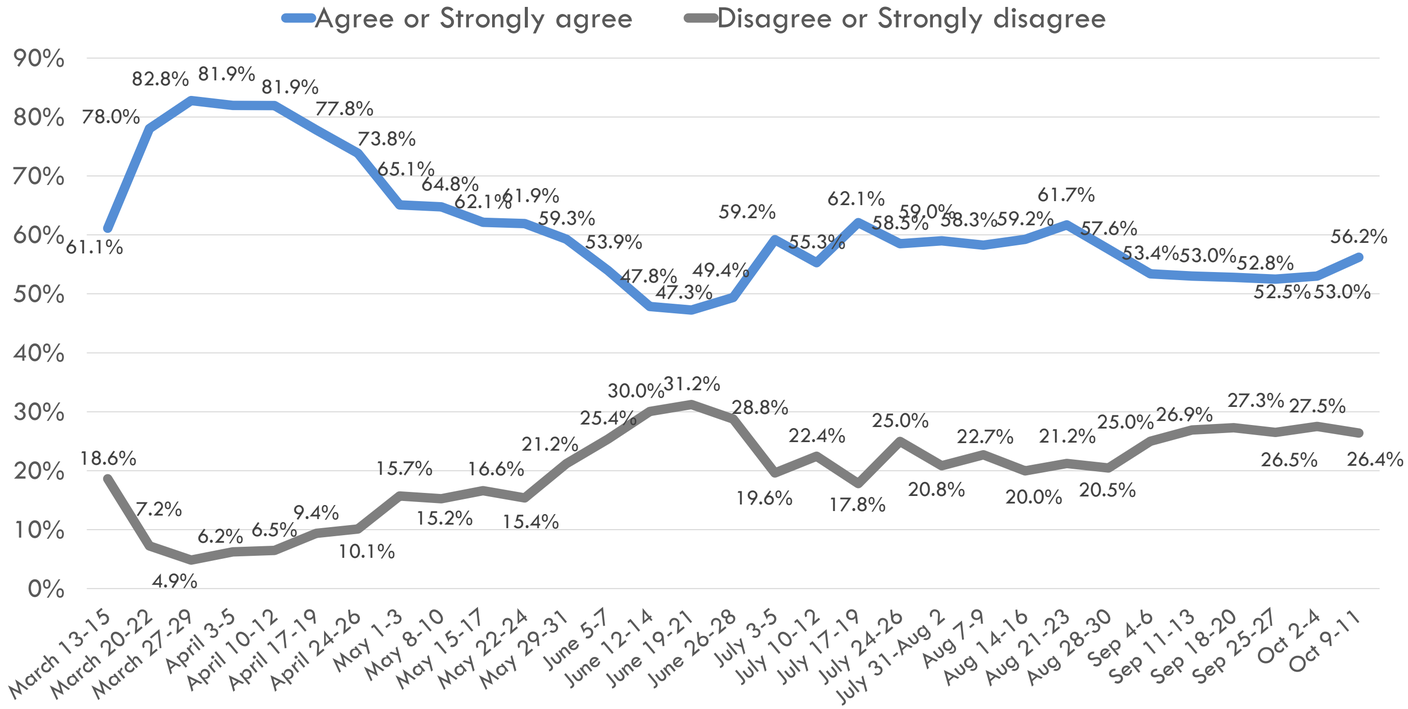
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

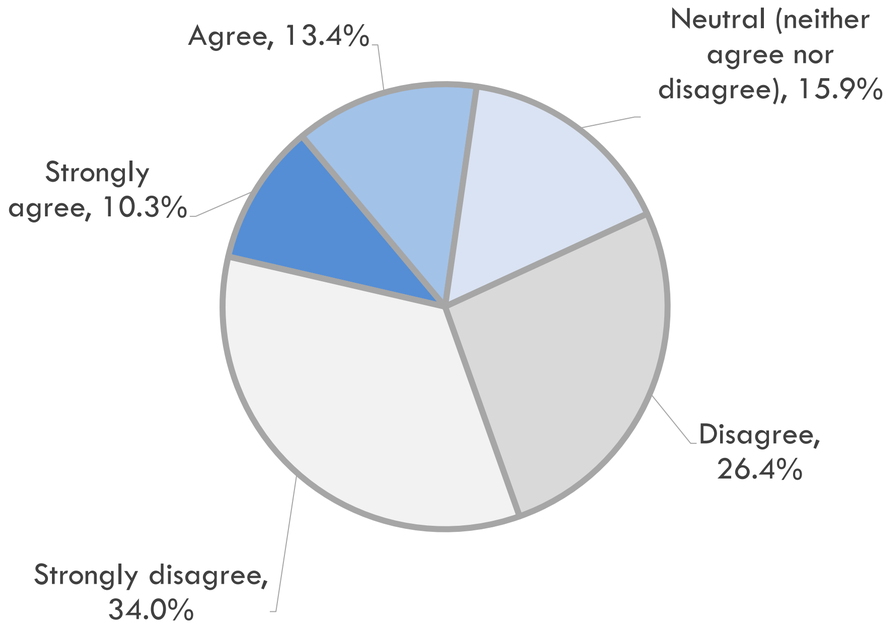
Historical data



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

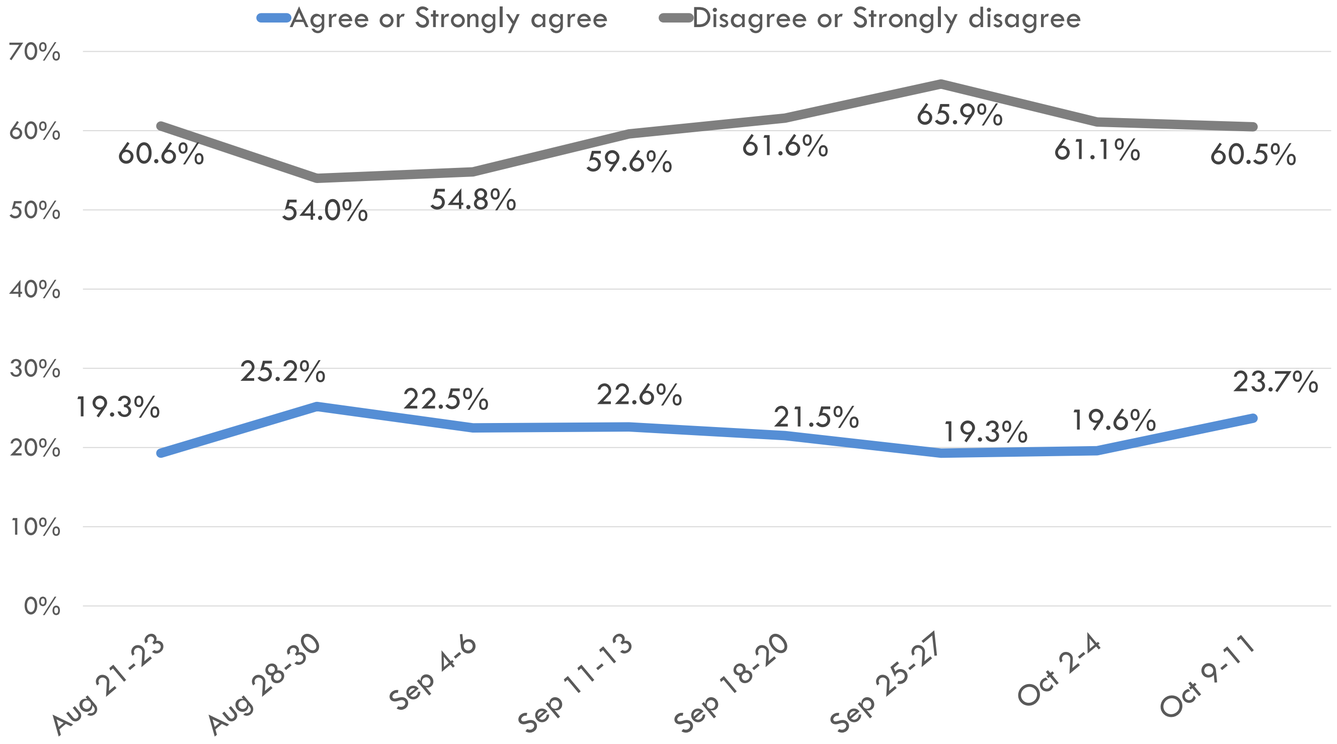
How much do you agree with the following statement?

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



(Base: Waves 24-31. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

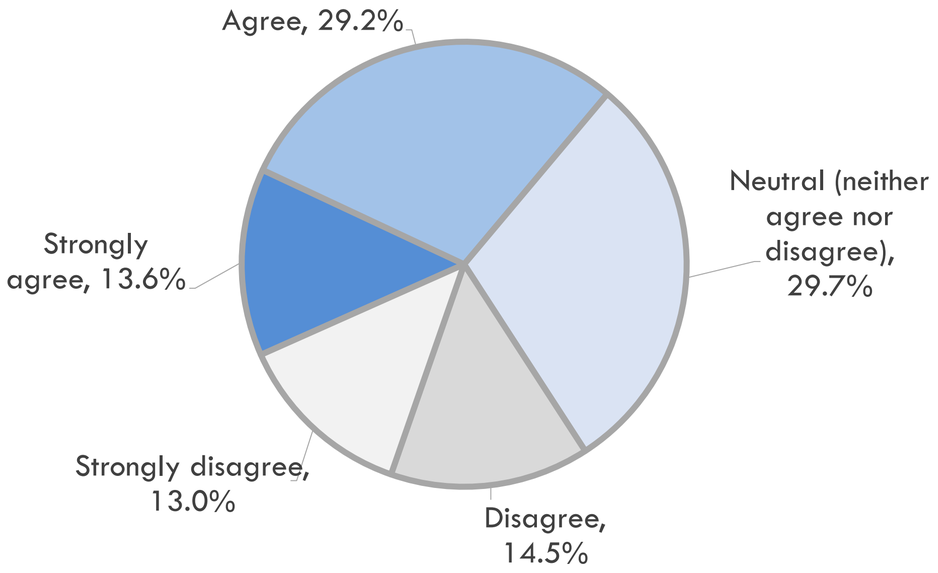
Historical data



DISCOUNTS AND PRICE CUTS

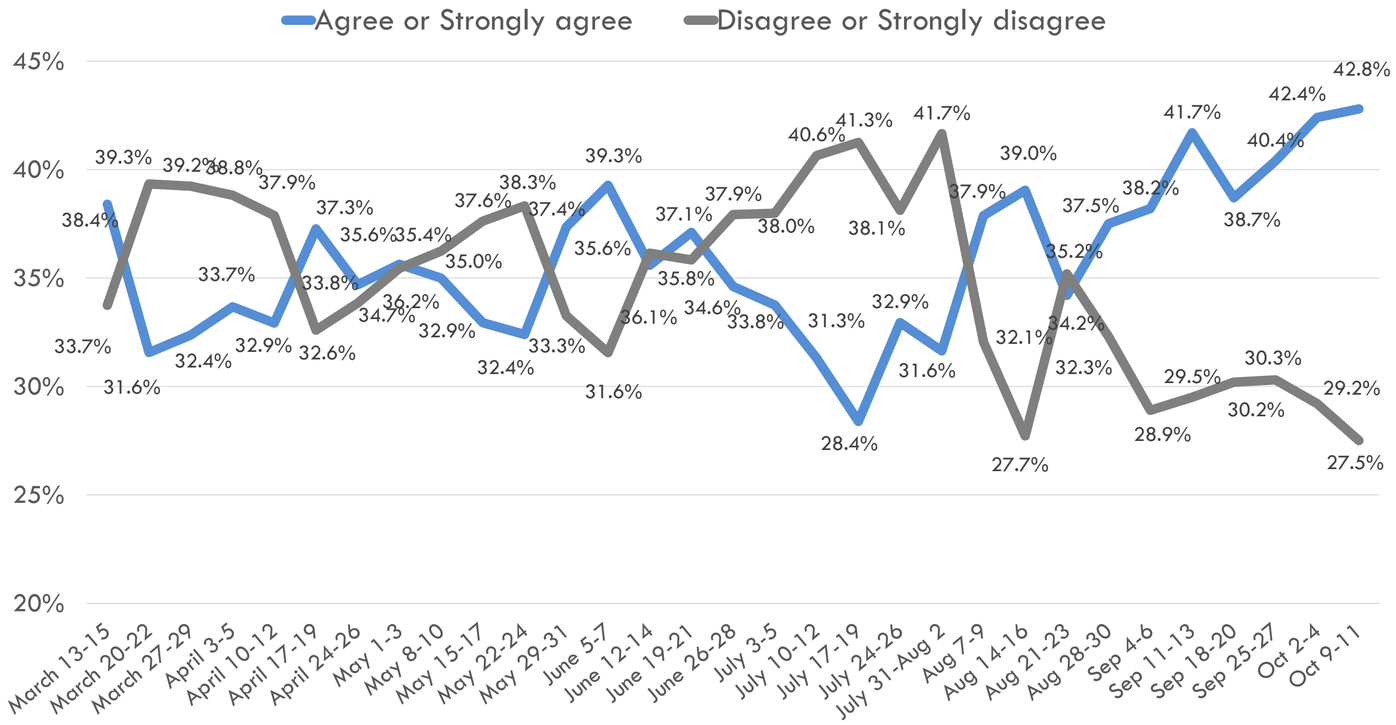
How much do you agree with the following statement?

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 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

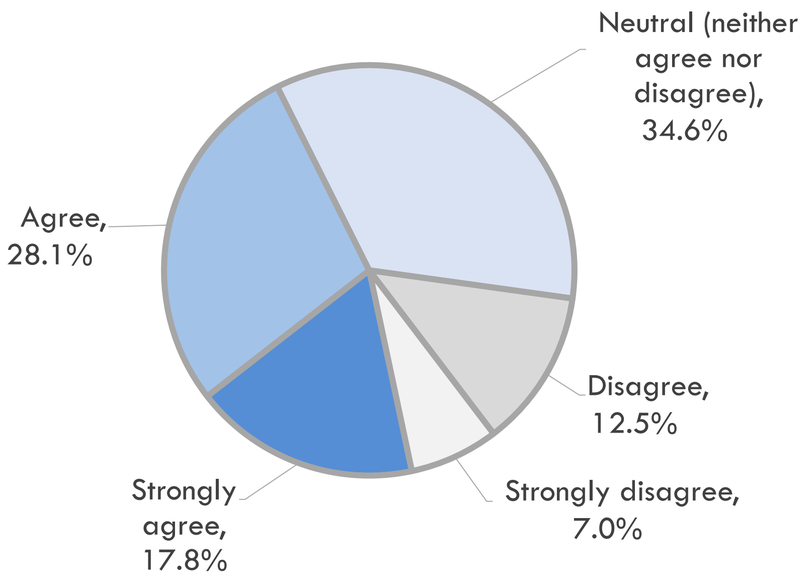
Historical data



ROAD TRIPS AS A REPLACEMENT FOR AIRLINE TRAVEL

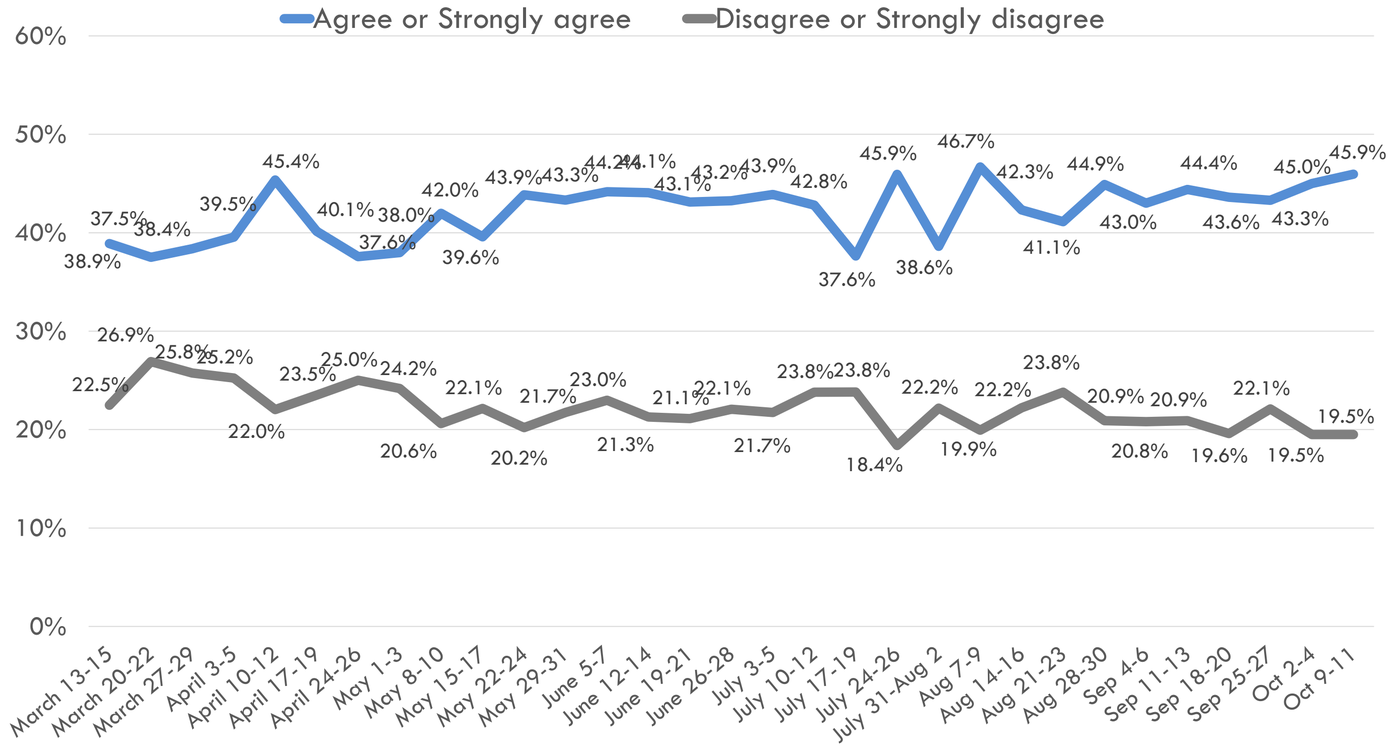
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

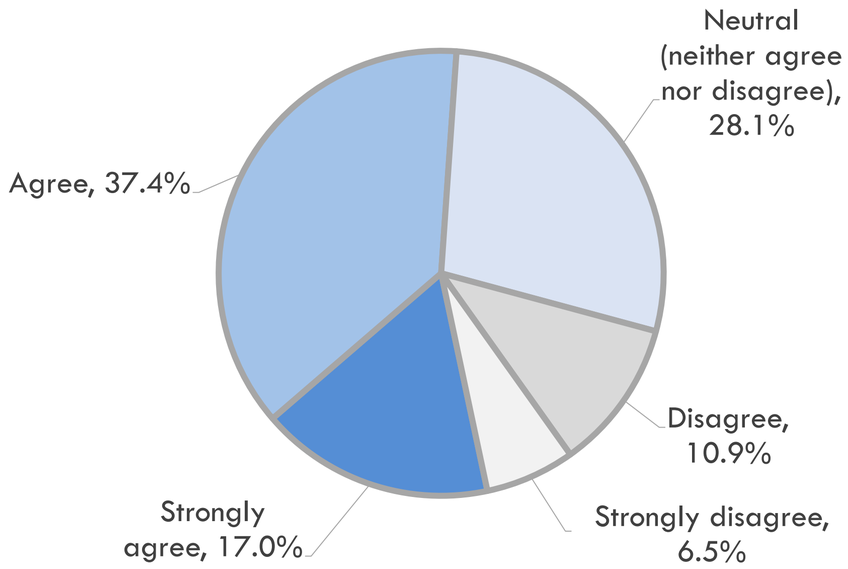
Historical data



REGIONAL TRIPS AS A REPLACEMENT FOR LONG-HAUL TRAVEL

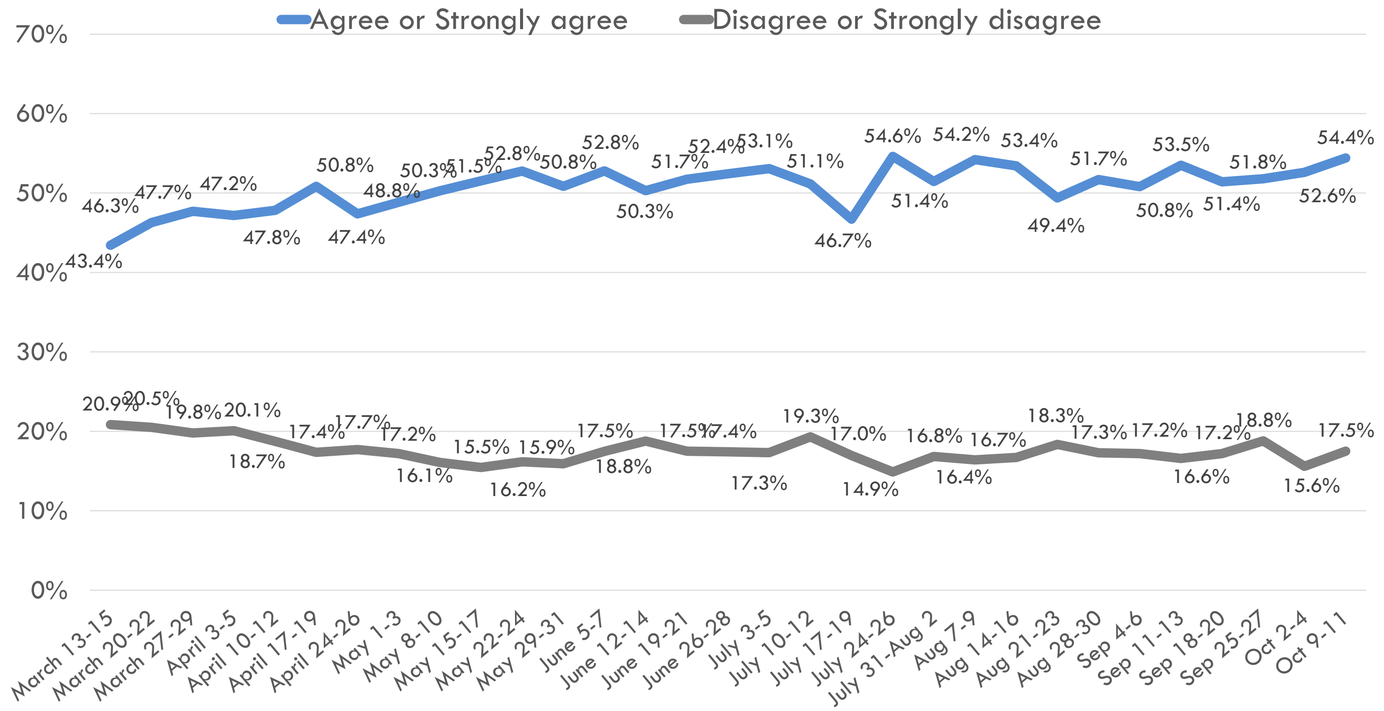
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

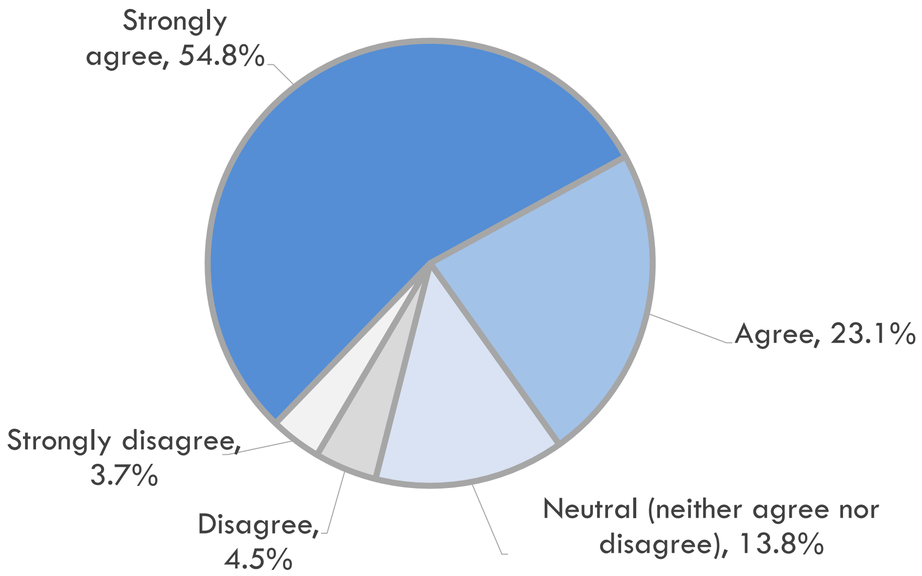
Historical data



AVOIDING INTERNATIONAL TRAVEL

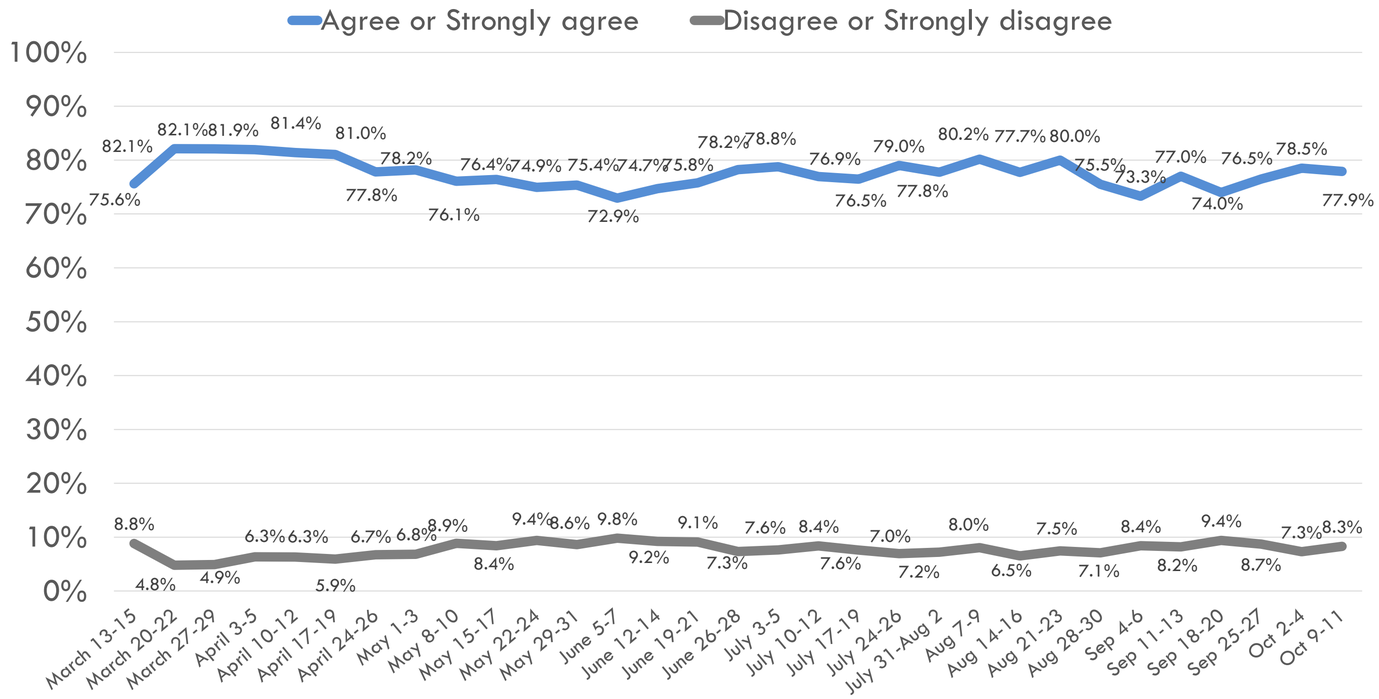
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

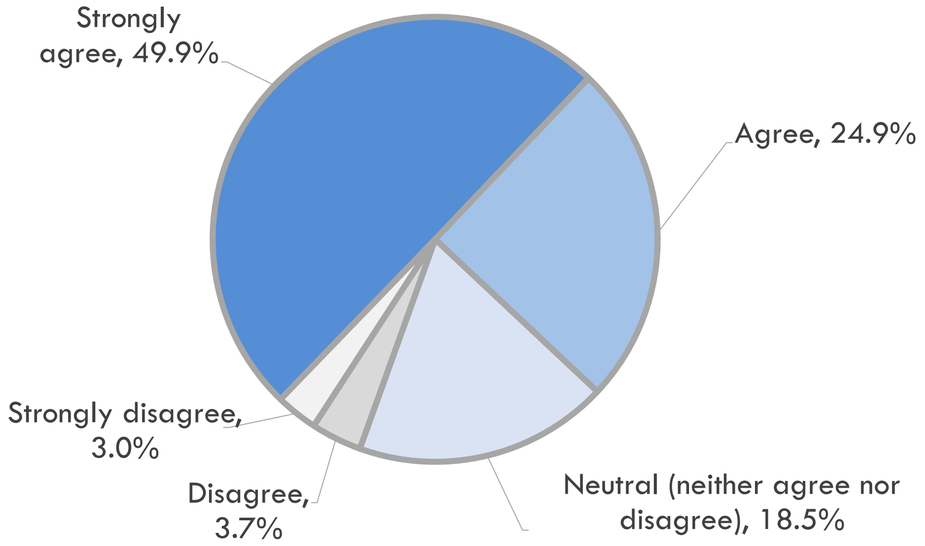
Historical data



AVOIDING CONVENTIONS & CONFERENCES

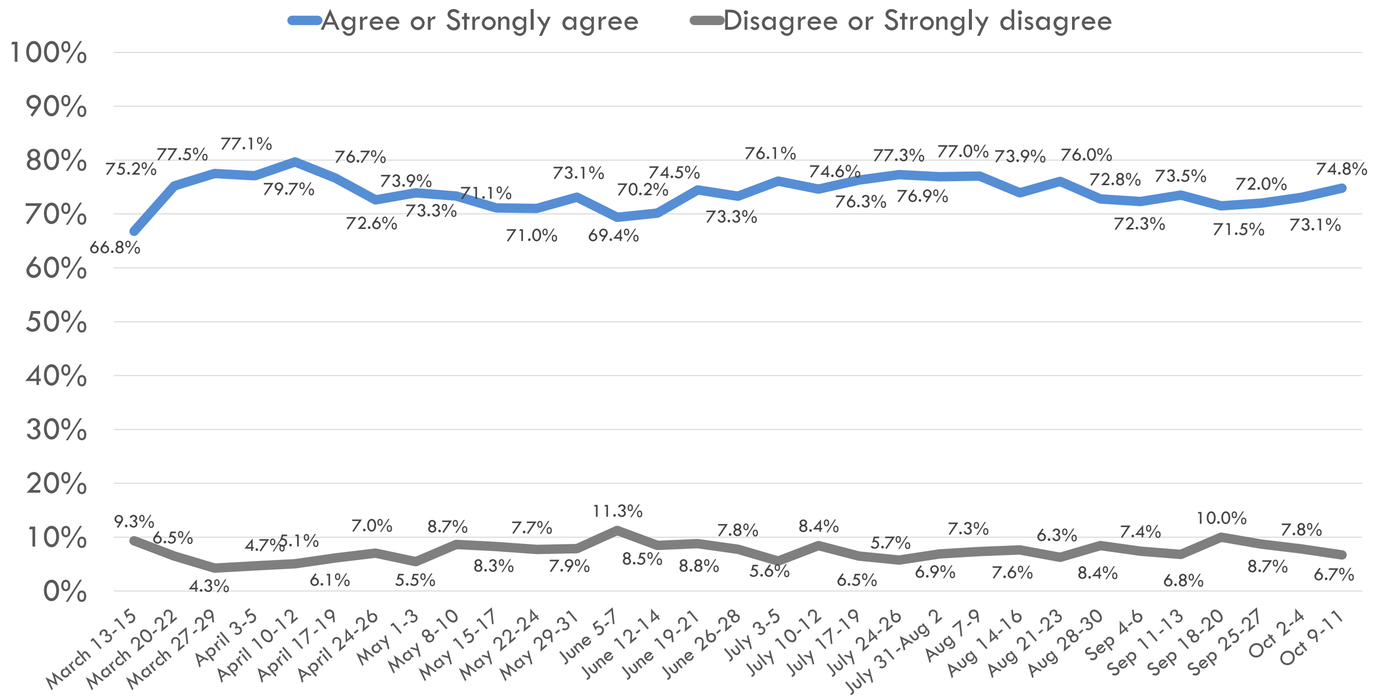
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

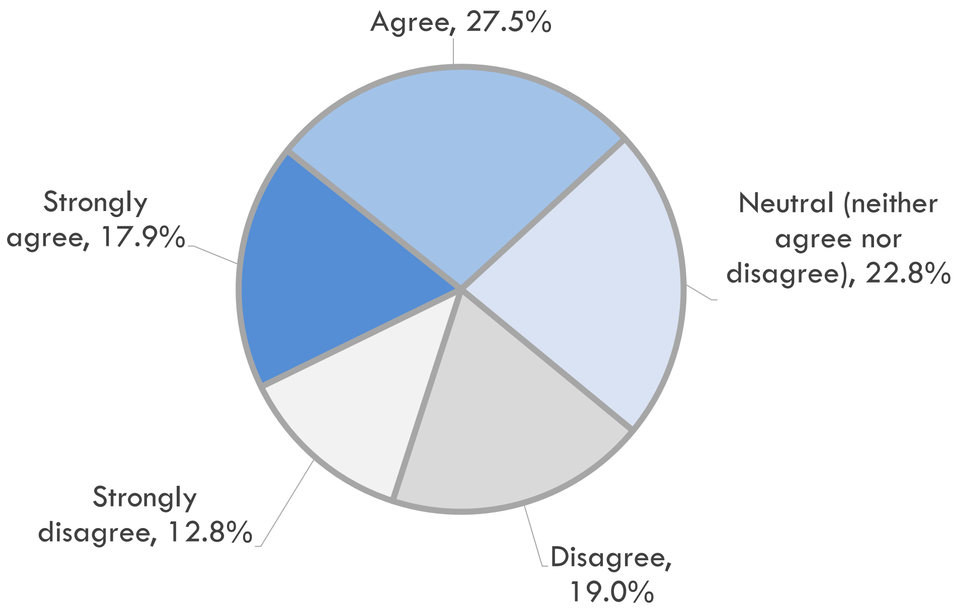
Historical data



COMFORT ENJOYING HOME COMMUNITY

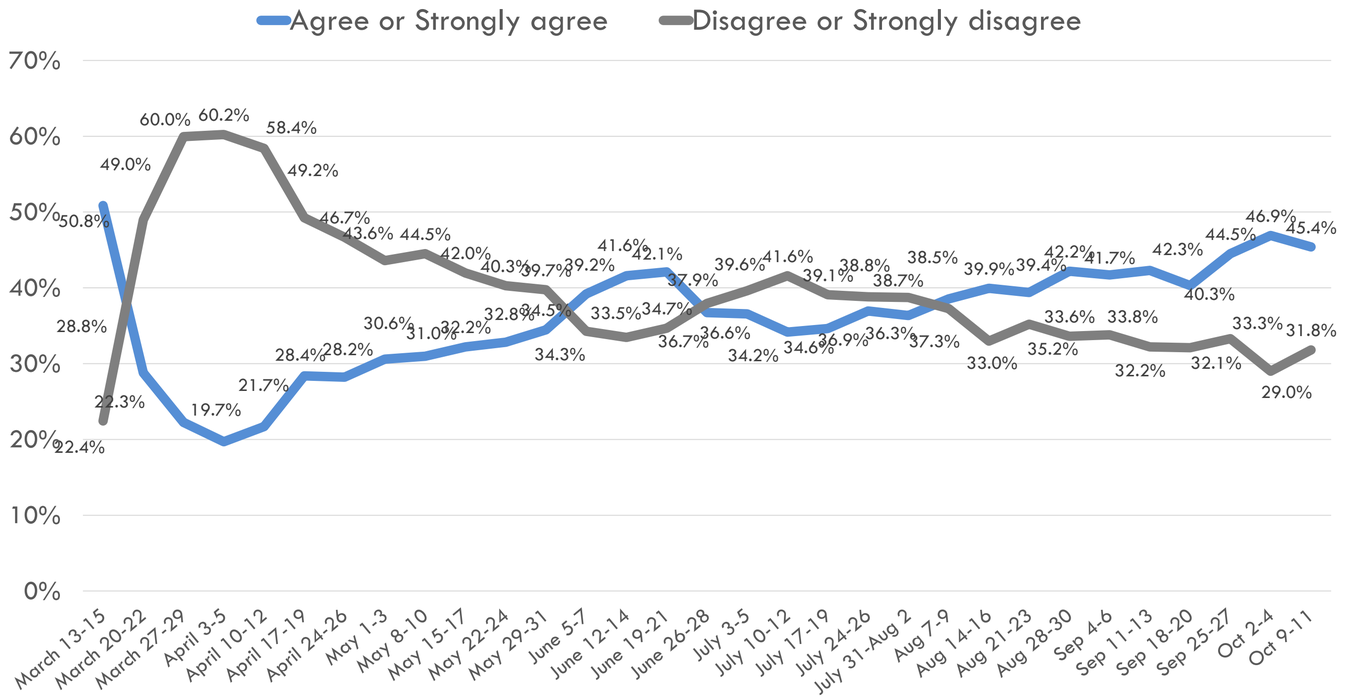
How much do you agree with the following statement?

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



(Base: Waves 1-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

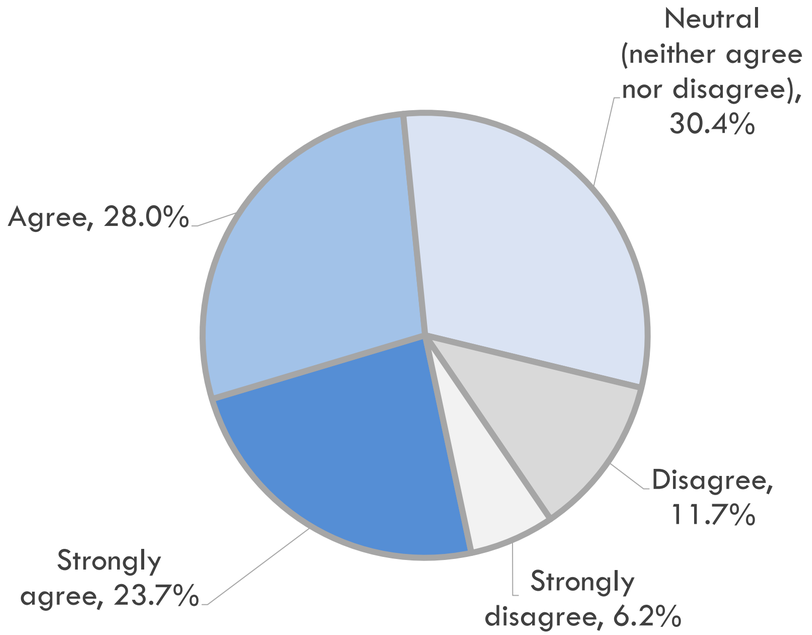
Historical data



TRAVELERS IN COMMUNITY ARE UNWANTED

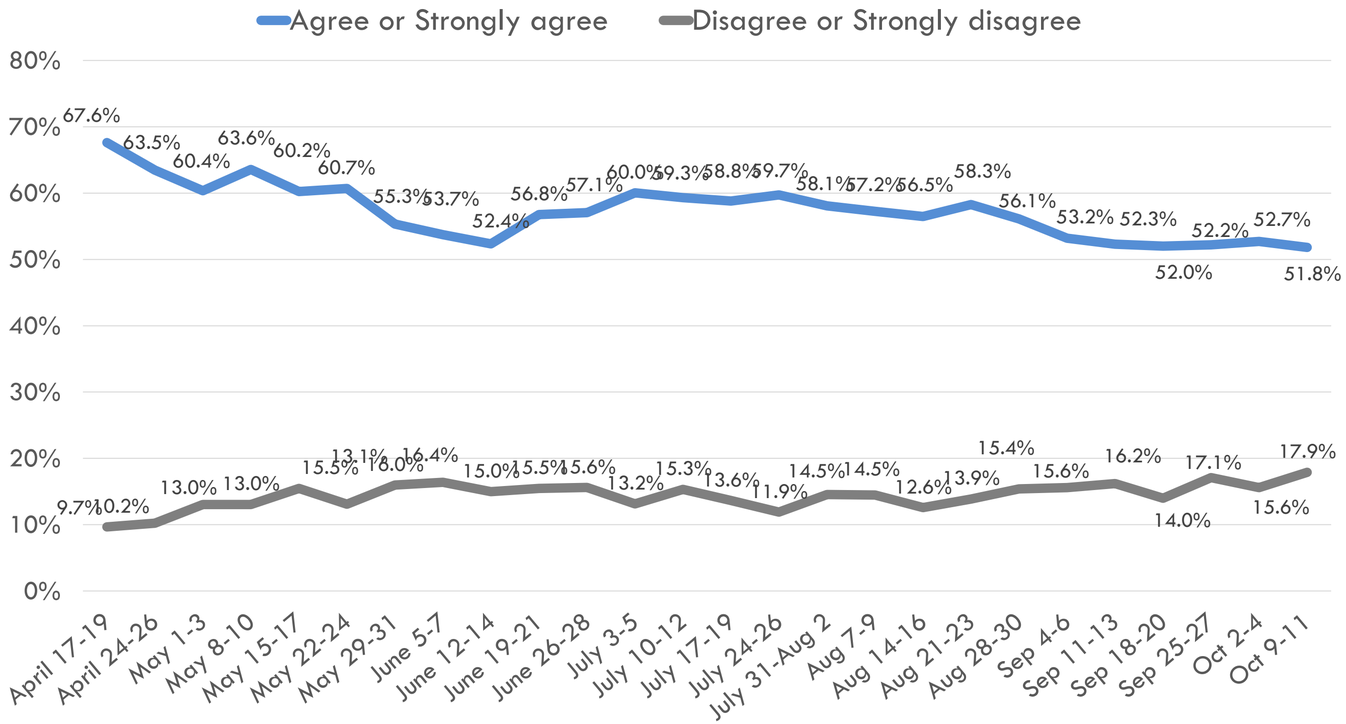
How much do you agree with the following statement?

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



(Base: Waves 6-31. 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, 1,200, 1,205, 1,203 and 1,203 completed survey.)

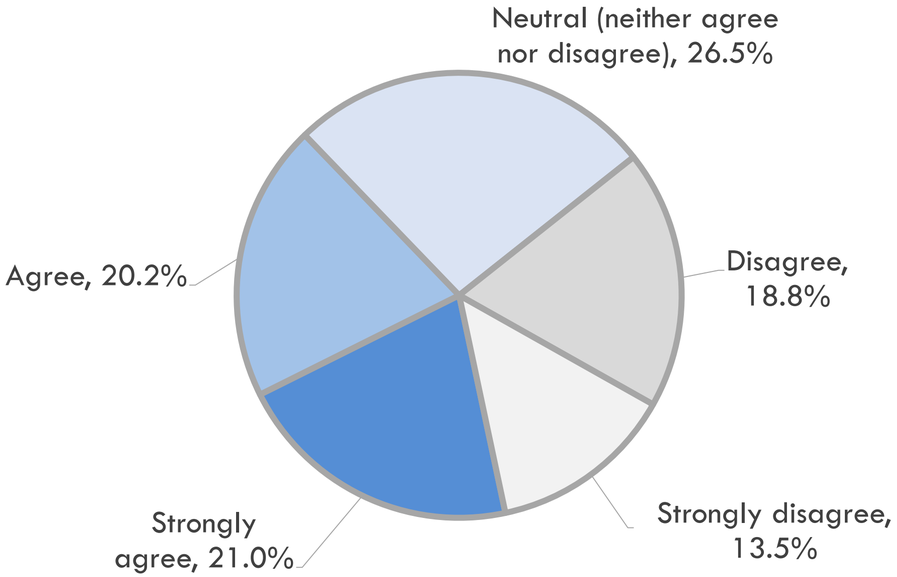
Historical data



WON'T TRAVEL WITHOUT VACCINE

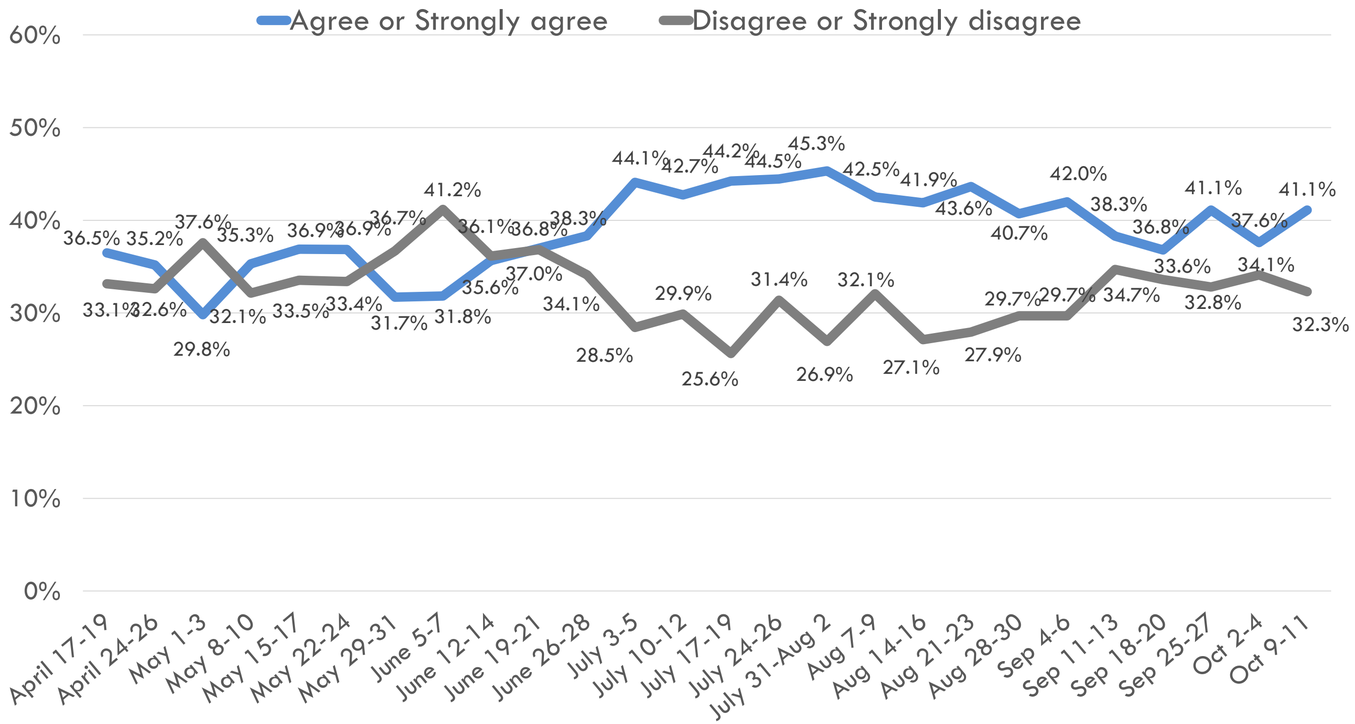
How much do you agree with the following statement?

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



(Base: Waves 6-31. 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, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

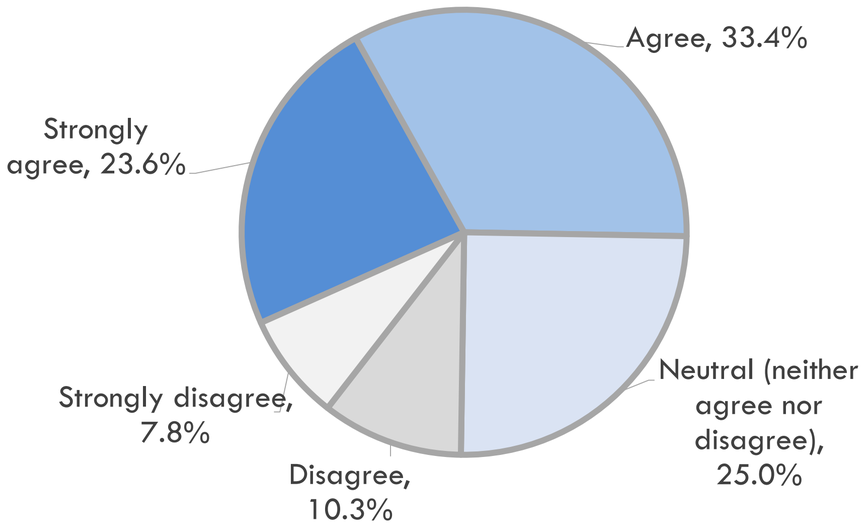
Historical data



HAPPINESS PLANNING A VACATION WITHIN NEXT 6 MONTHS

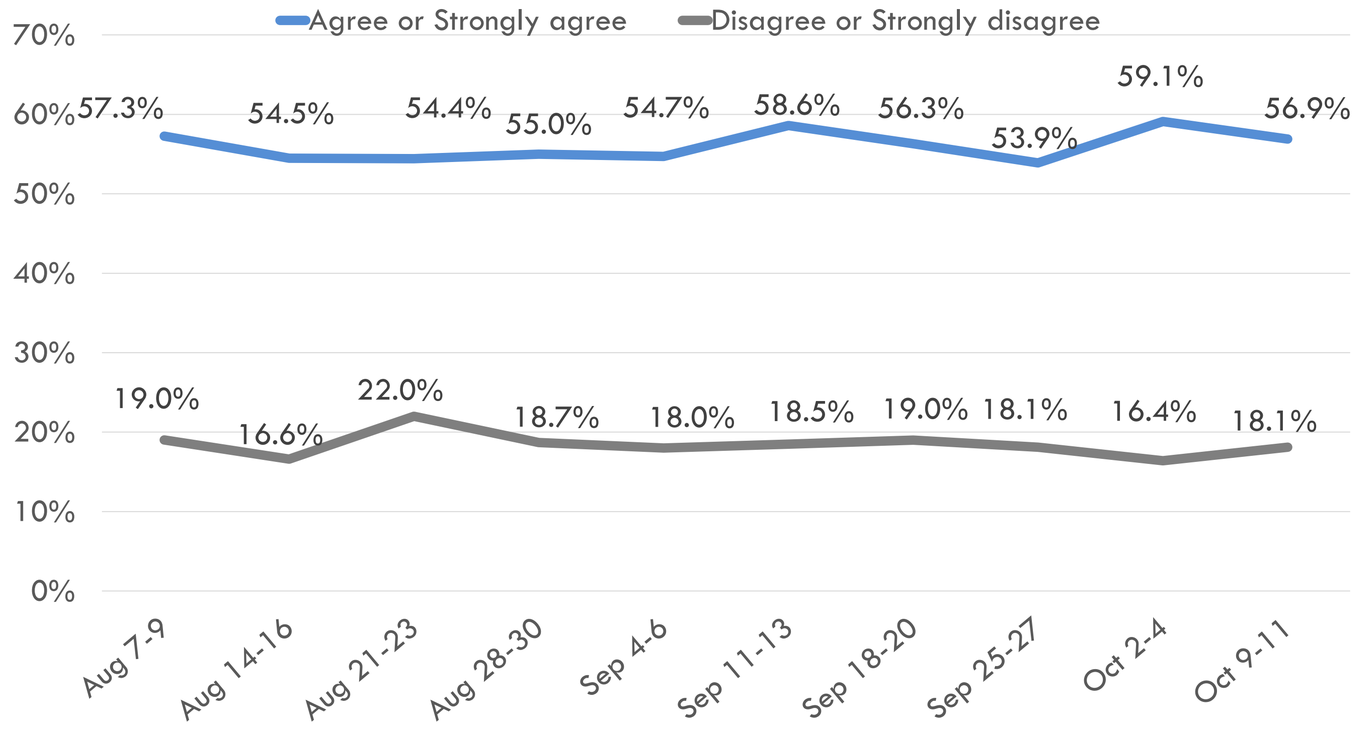
How much do you agree with the following statement?

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



(Base: Waves 22-31. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

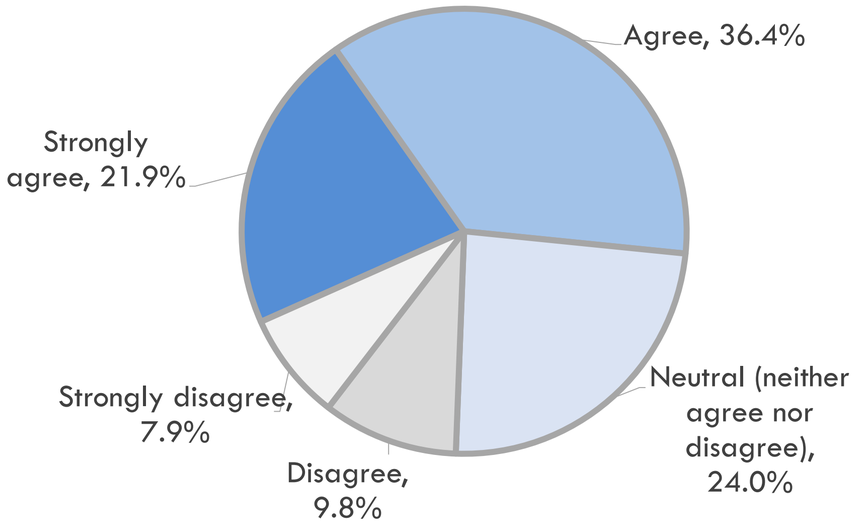
Historical data



HAPPINESS WITH SCHEDULING A VACATION IN NEXT 6 MONTHS

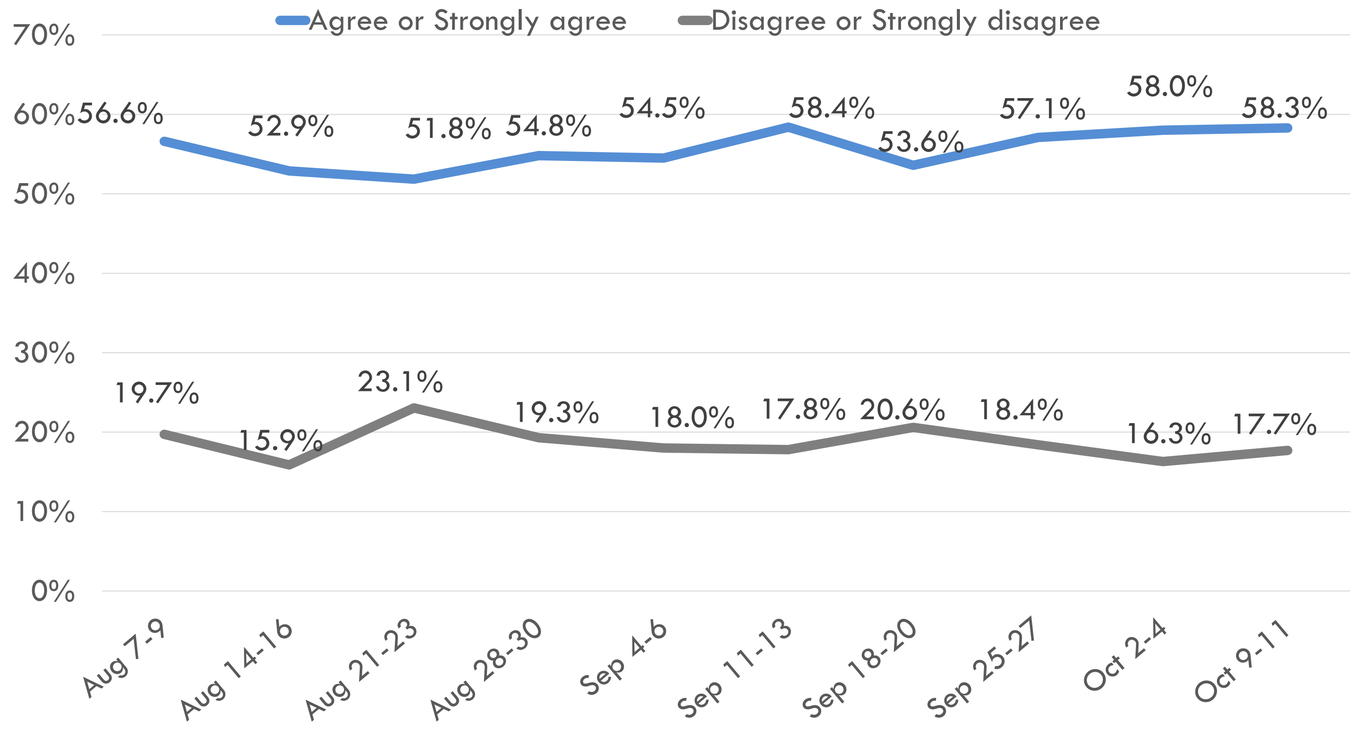
How much do you agree with the following statement?

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



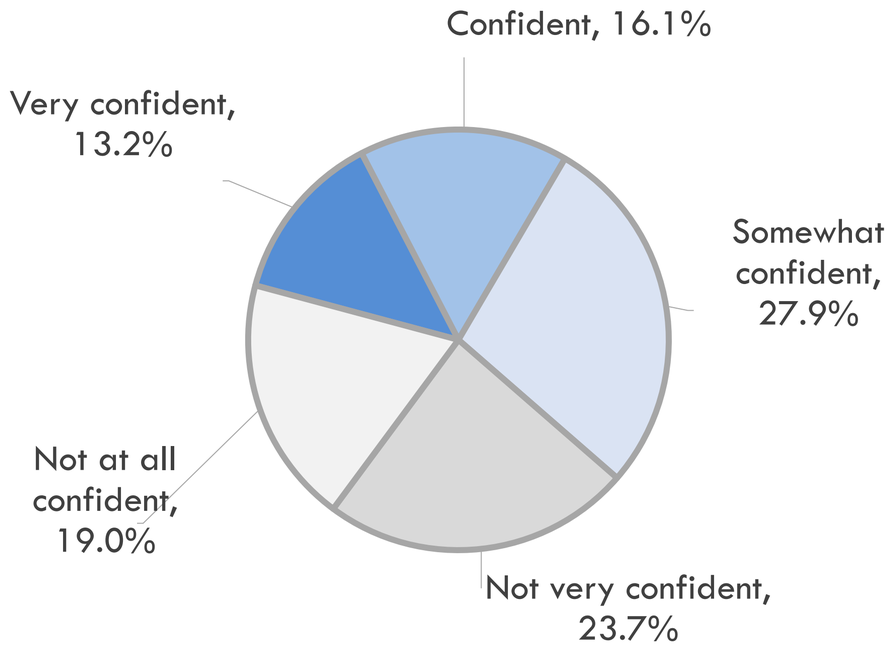
(Base: Waves 22-31. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

Historical data

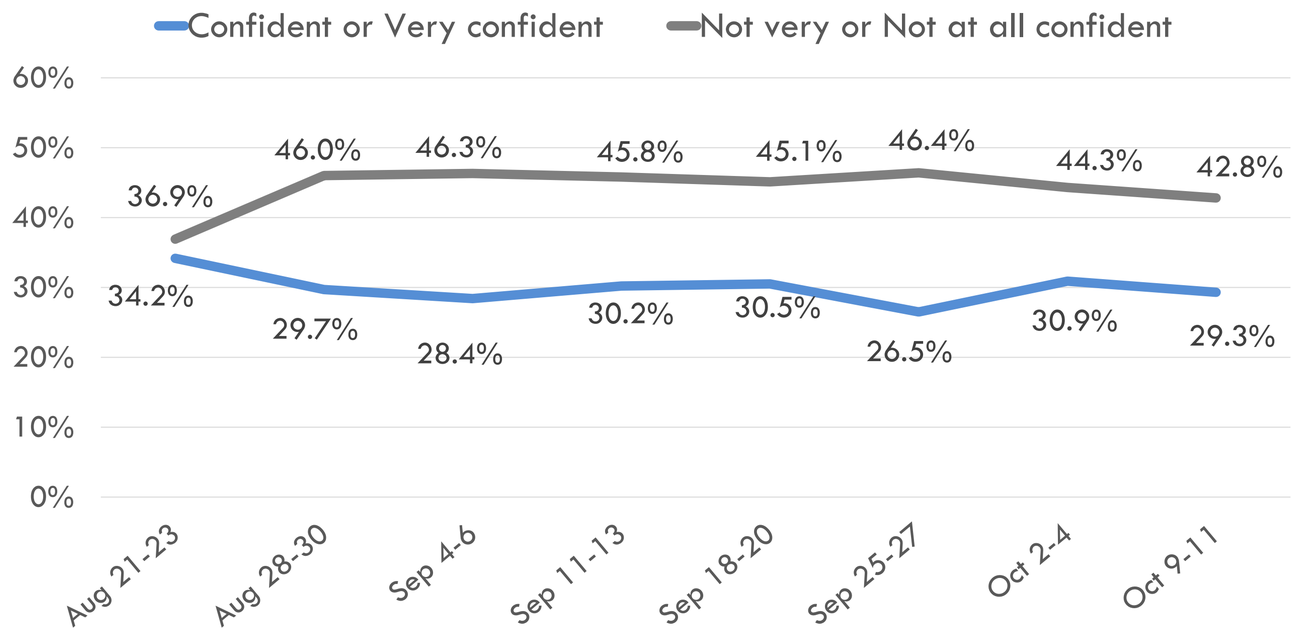


CONFIDENCE IN TRAVELING SAFELY

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



Historical data

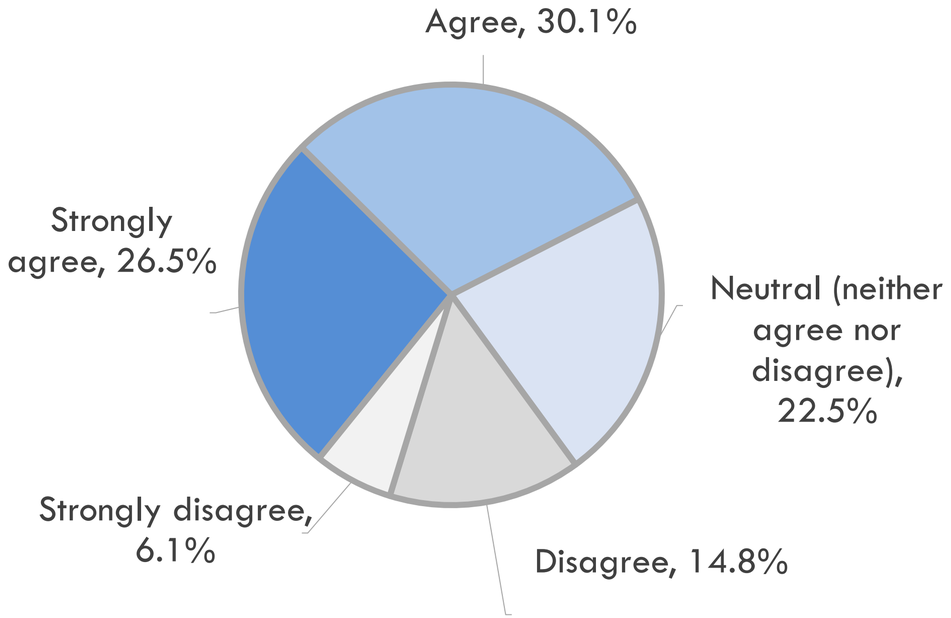


(Base: Wave 24-31 data. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

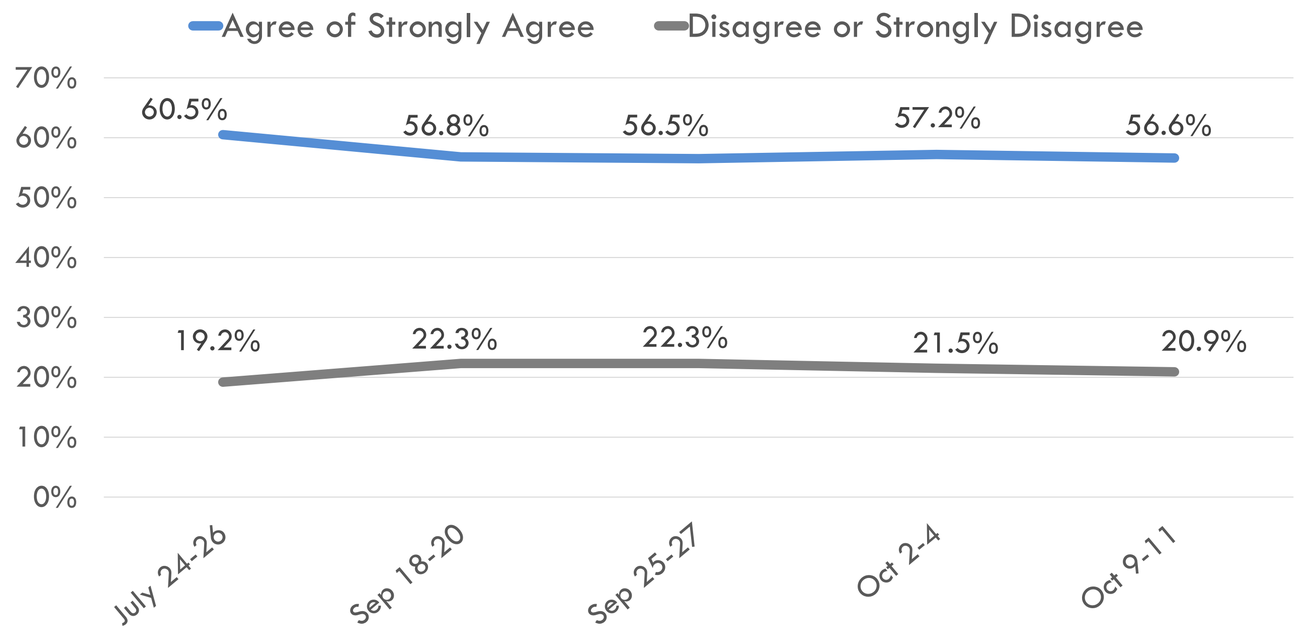
INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

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.



Historical data

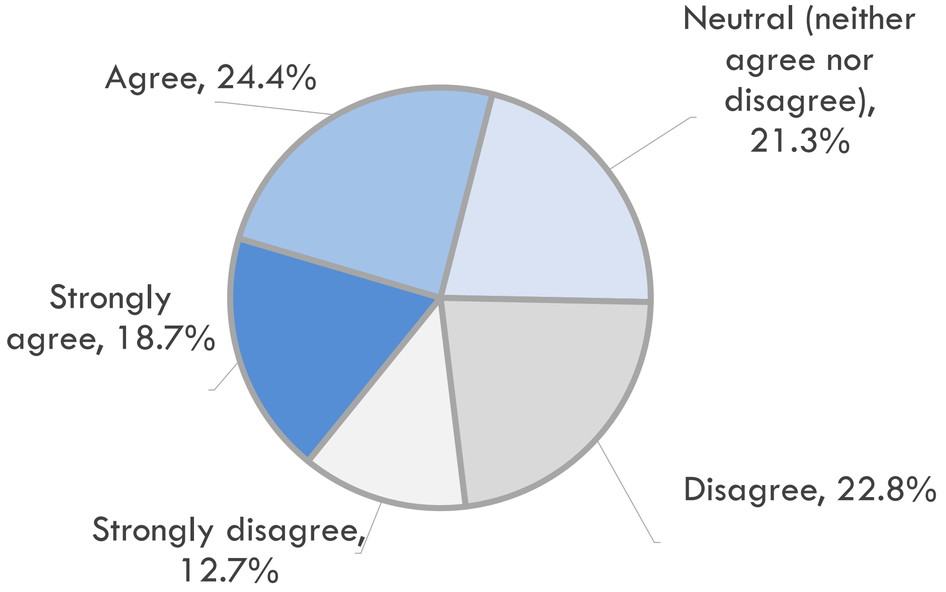


(Base: Waves 20, 28-31 data. All respondents, 1,206, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

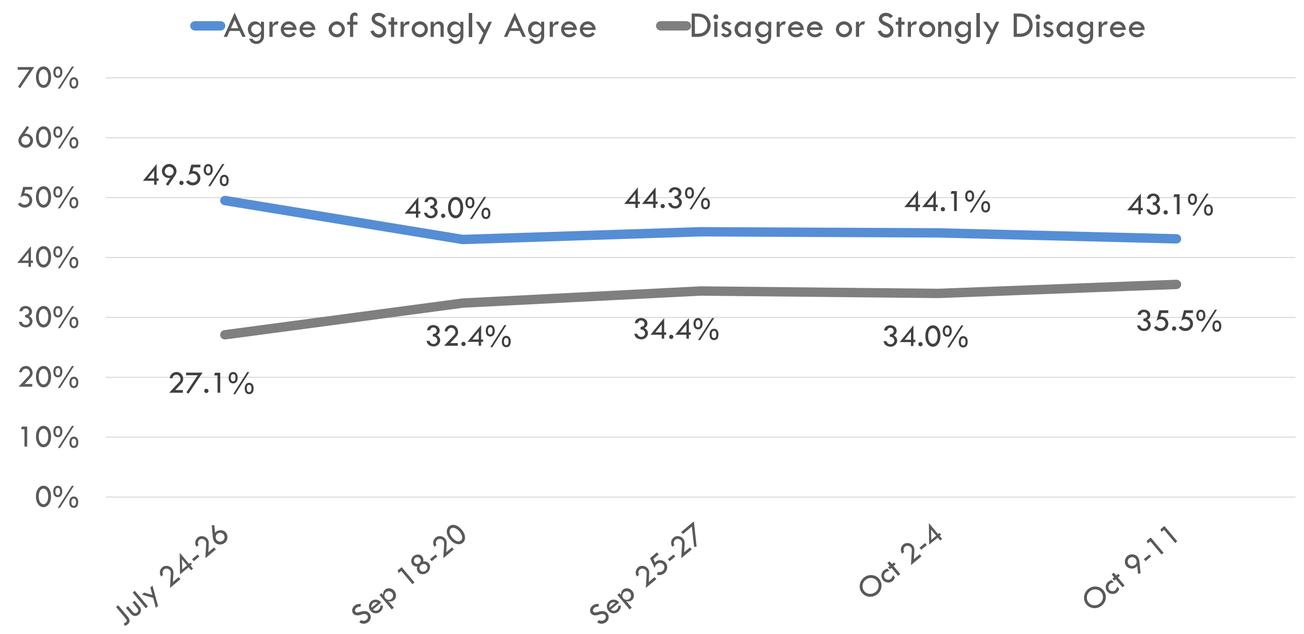
LOSS OF INTEREST IN TRAVEL

How much do you agree with the following statement?

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



Historical data

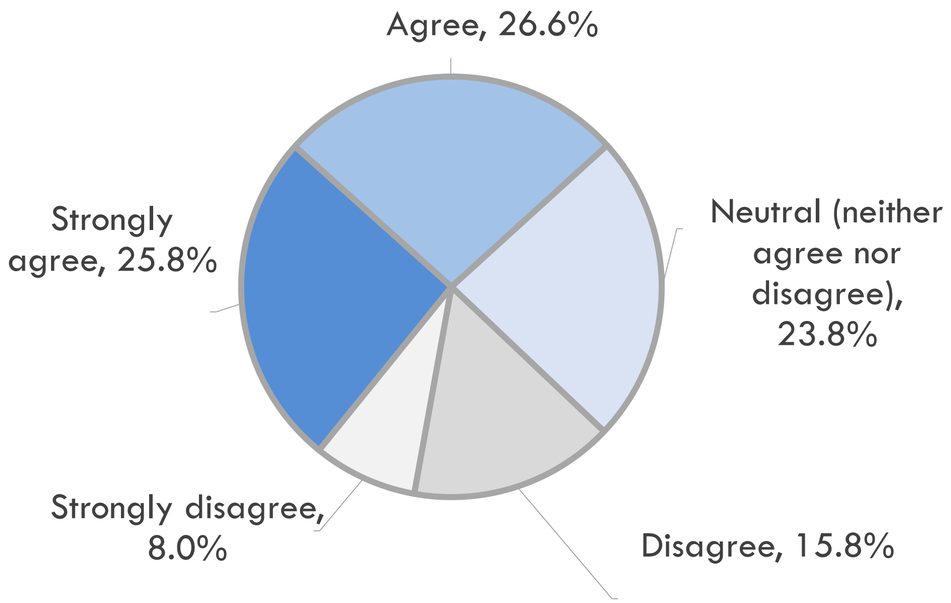


(Base: Waves 20, 28-31 data. All respondents, 1,206, 1,200, 1,205, 1,203 and 1,203 completed surveys.)

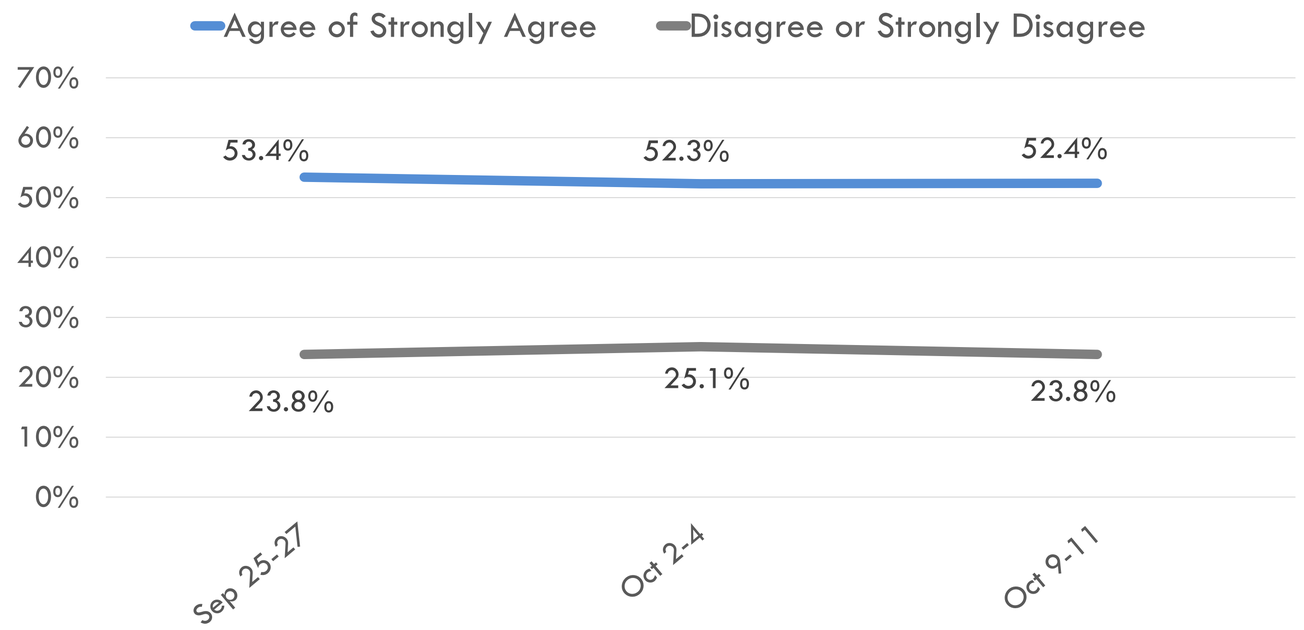
TRAVEL AS AN ESSENTIAL NEED ONLY

How much do you agree with the following statement?

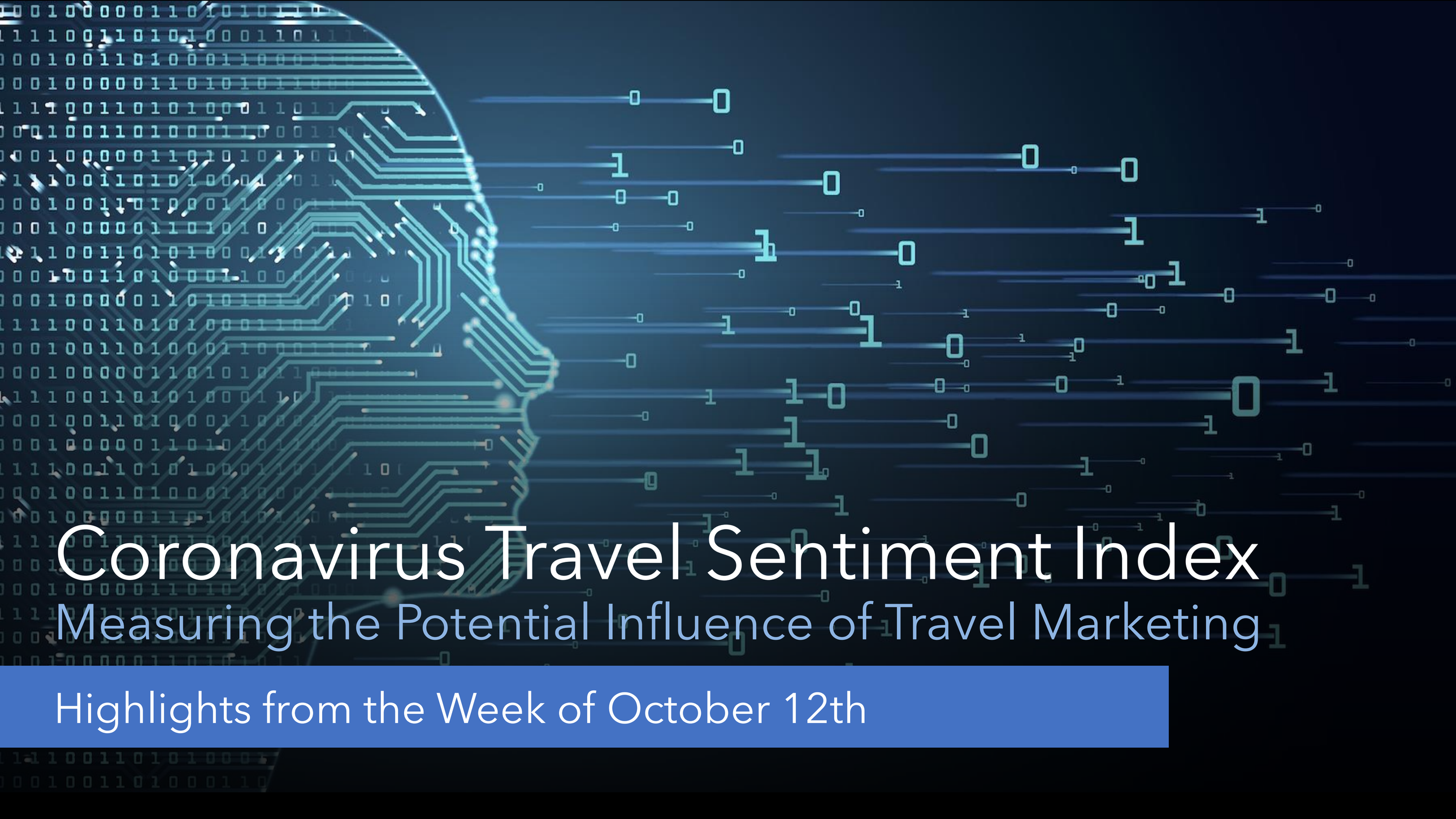
Statement: Due to the Coronavirus situation, I believe travel should be limited to essential needs only.



Historical data



(Base: Waves 29-31 data. All respondents, 1,205, 1,203 and 1,203 completed surveys.)



Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of October 12th

What is a Predictive Index?

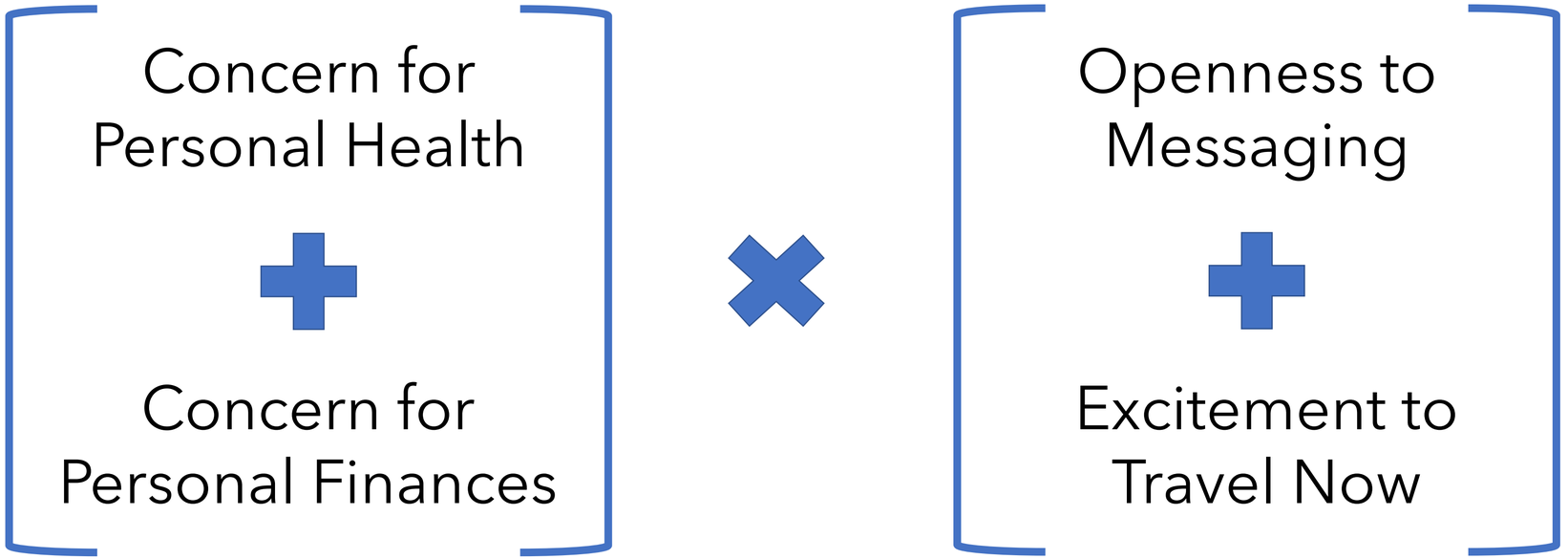
Indexing is the practice of compiling data into one single metric.

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:

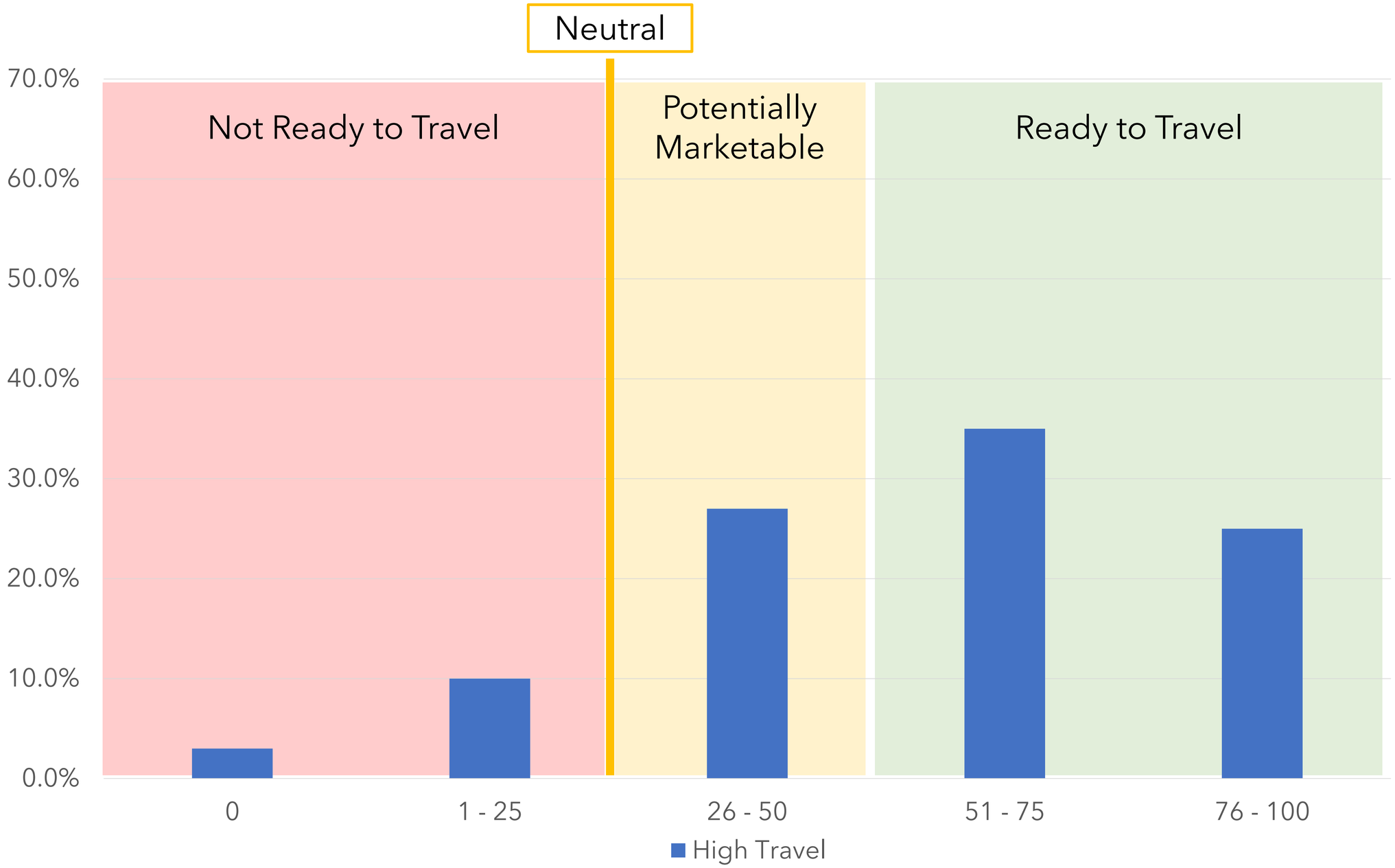
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

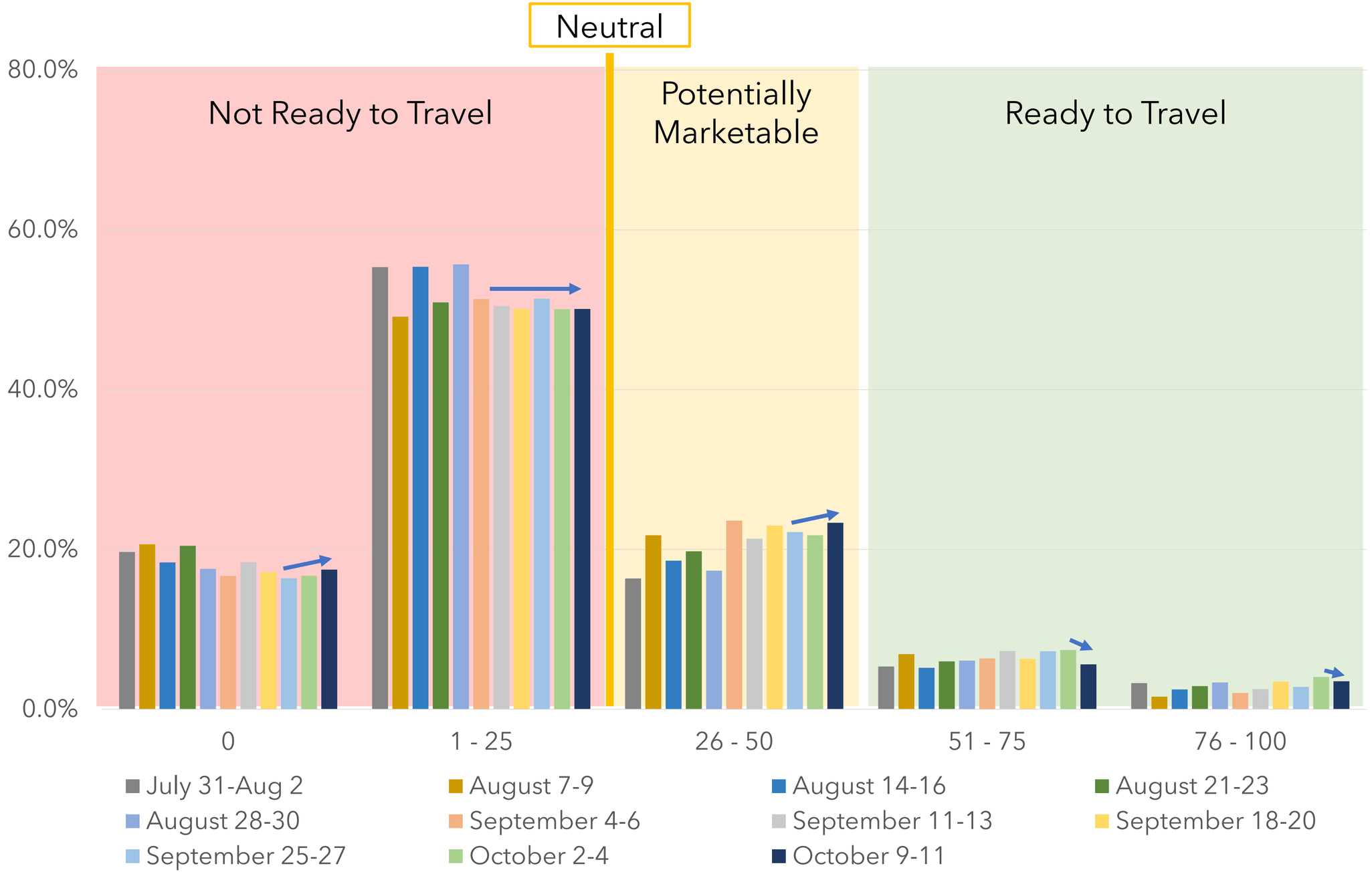


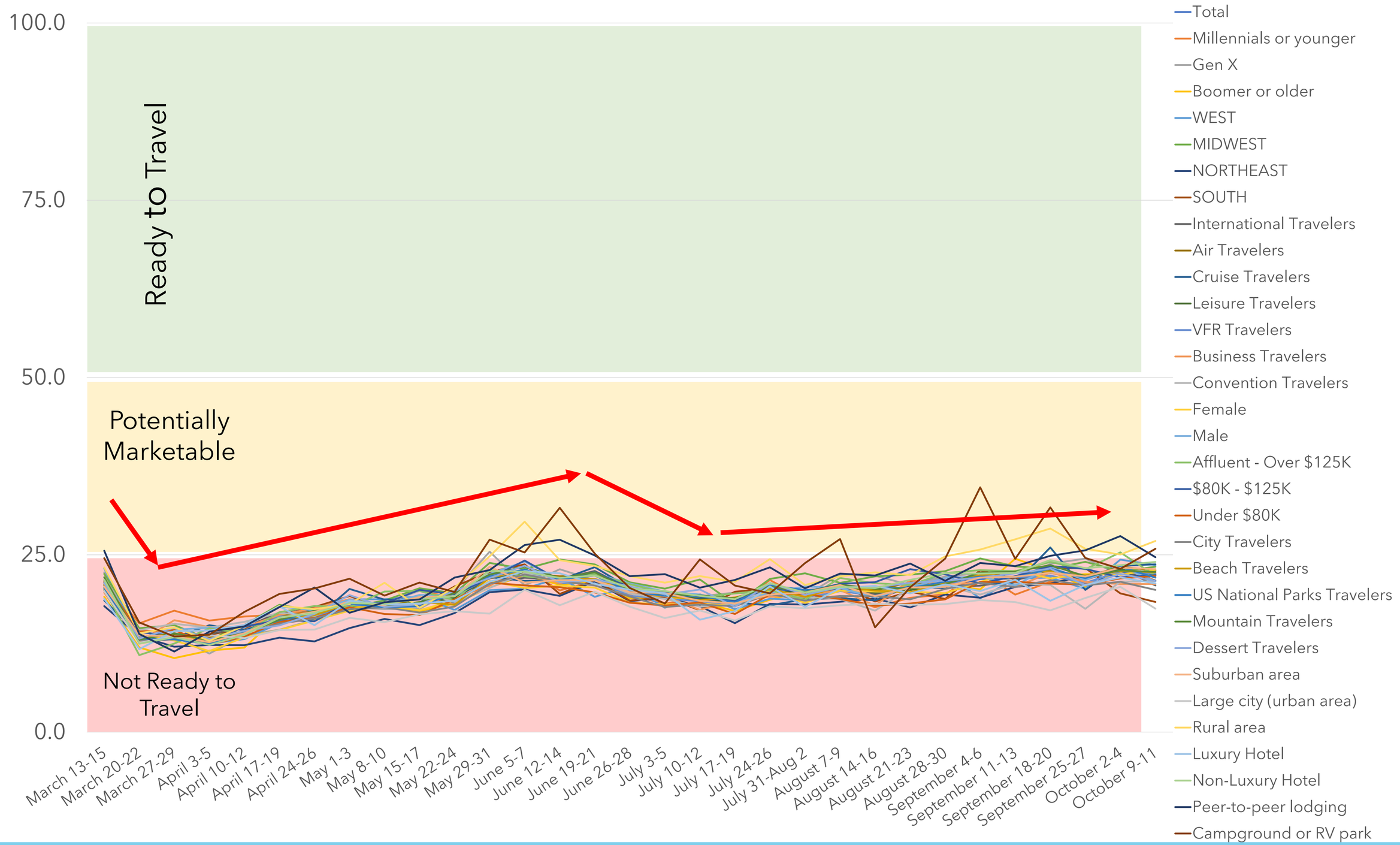
*Normalized to a 100pt scale

Healthy Travel Outlook

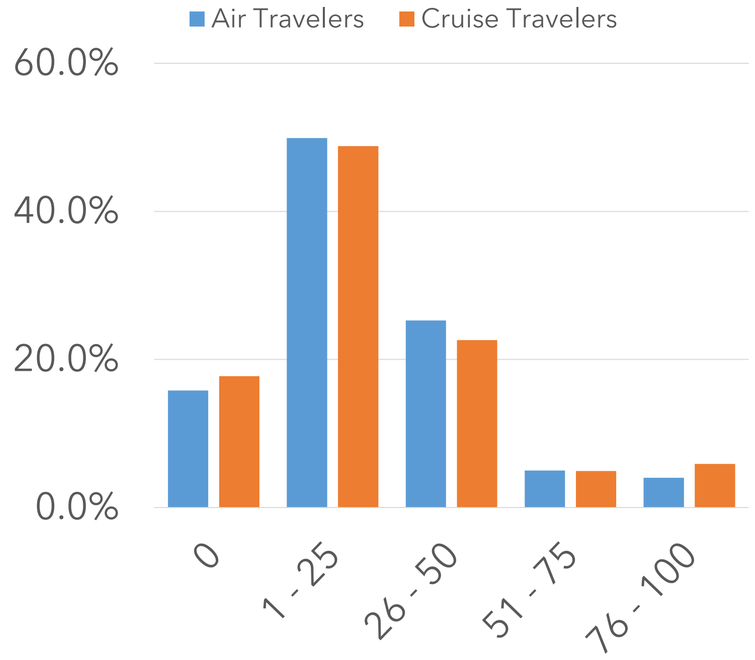


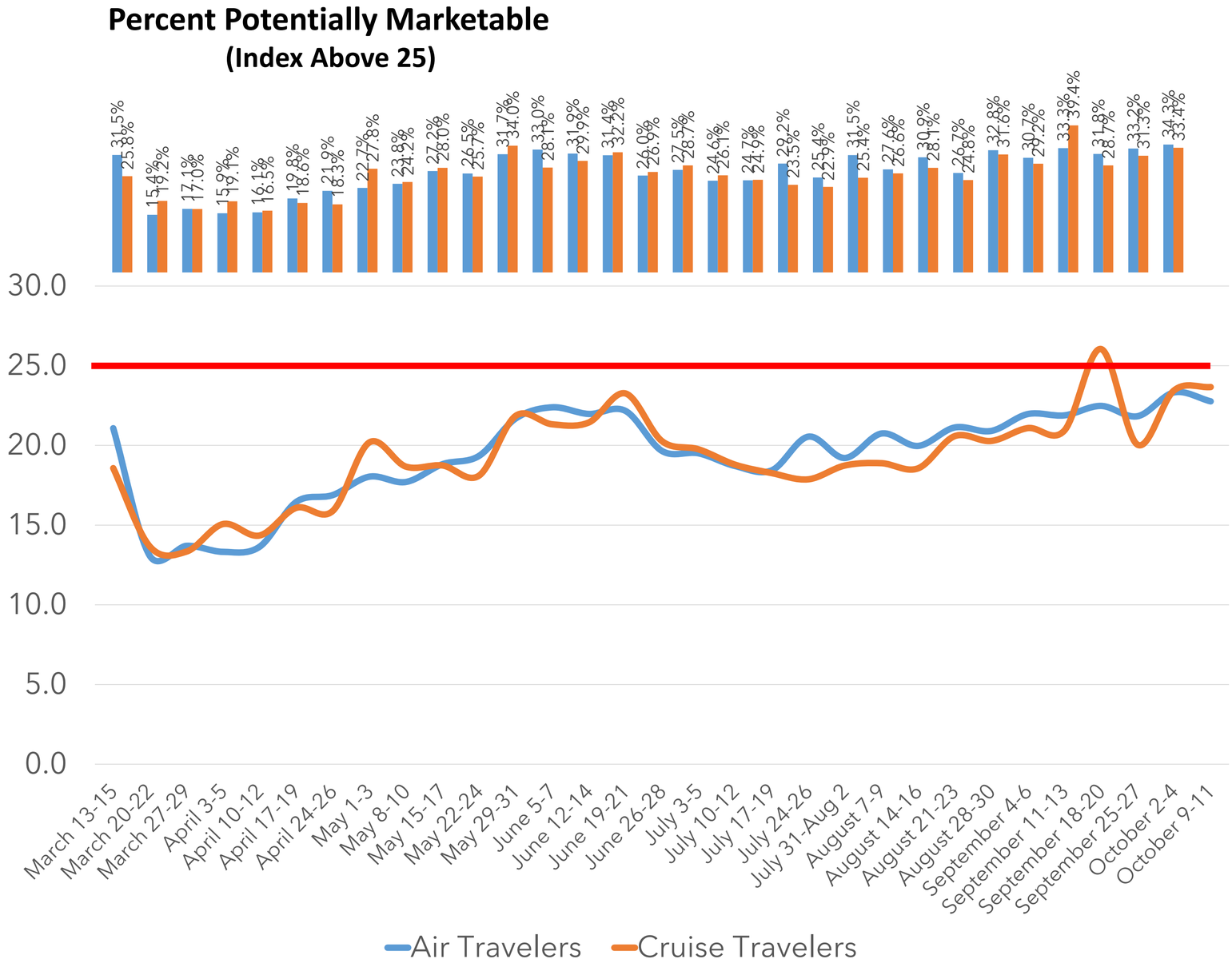
Travel Outlook



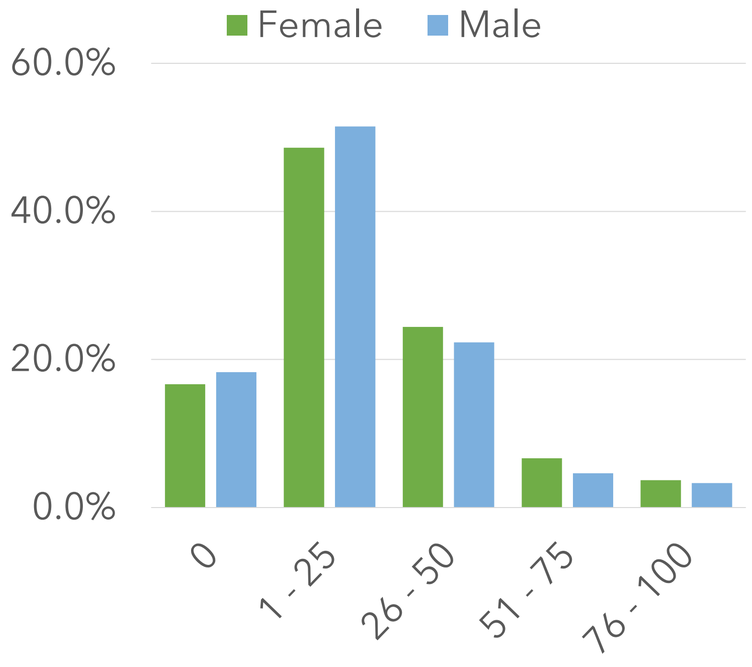

100.0
75.0
50.0
25.0
0.0
Ready to Travel
Potentially Marketable
Not Ready to Travel
March 13-15
March 20-22
March 27-29
April 3-5
April 10-12
April 17-19
April 24-26
May 1-3
May 8-10
May 15-17
May 22-24
May 29-31
June 5-7
June 12-14
June 19-21
June 26-28
July 3-5
July 10-12
July 17-19
July 24-26
July 31-Aug 2
August 7-9
August 14-16
August 21-23
August 28-30
September 4-6
September 11-13
September 18-20
September 25-27
October 2-4
October 9-11
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

Airline and Cruise Travelers

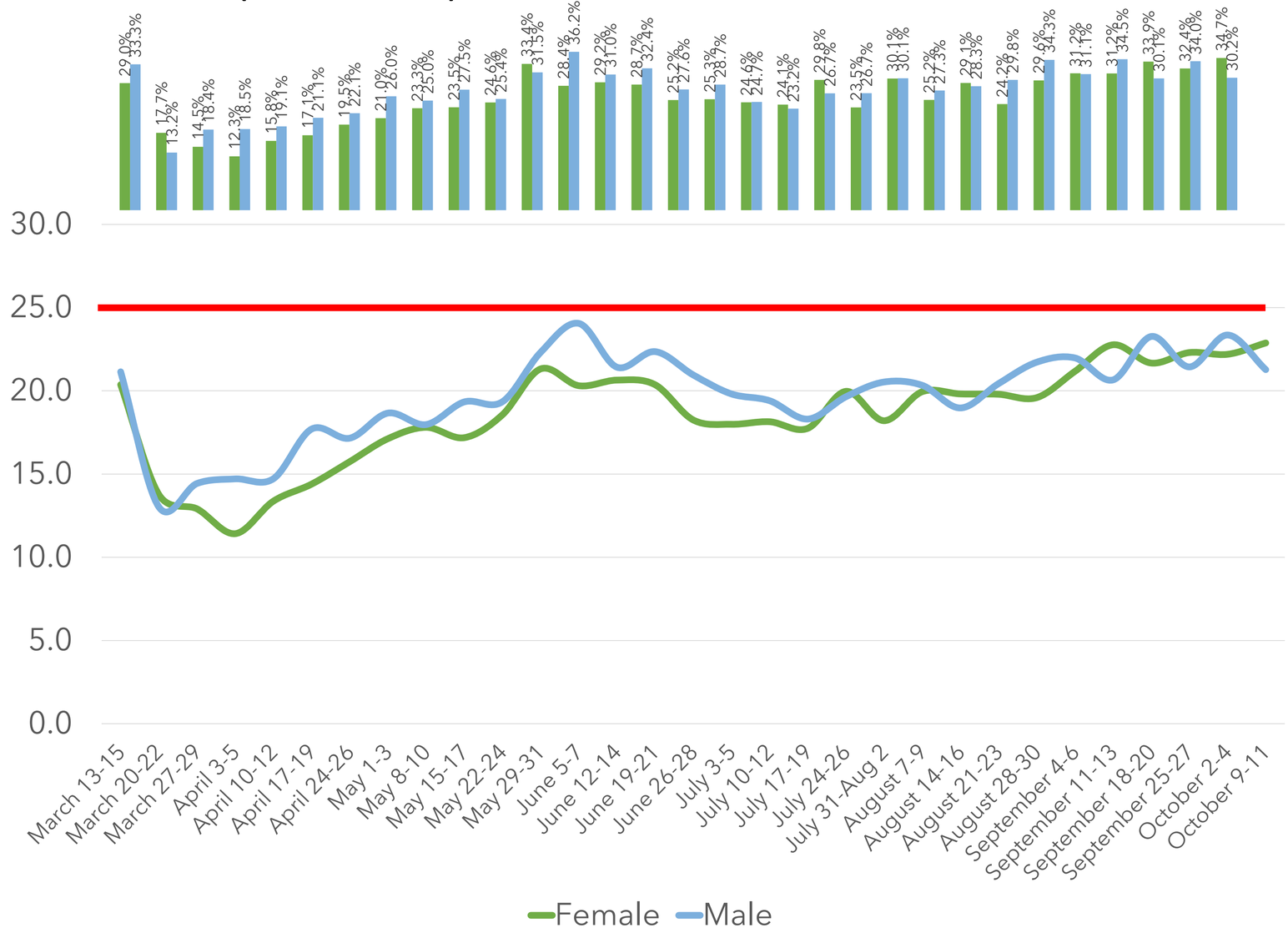




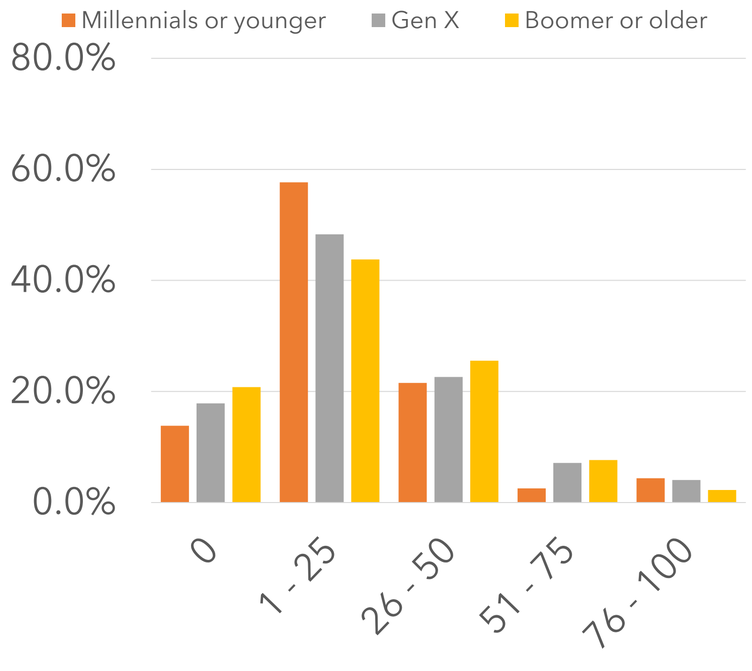
Gender

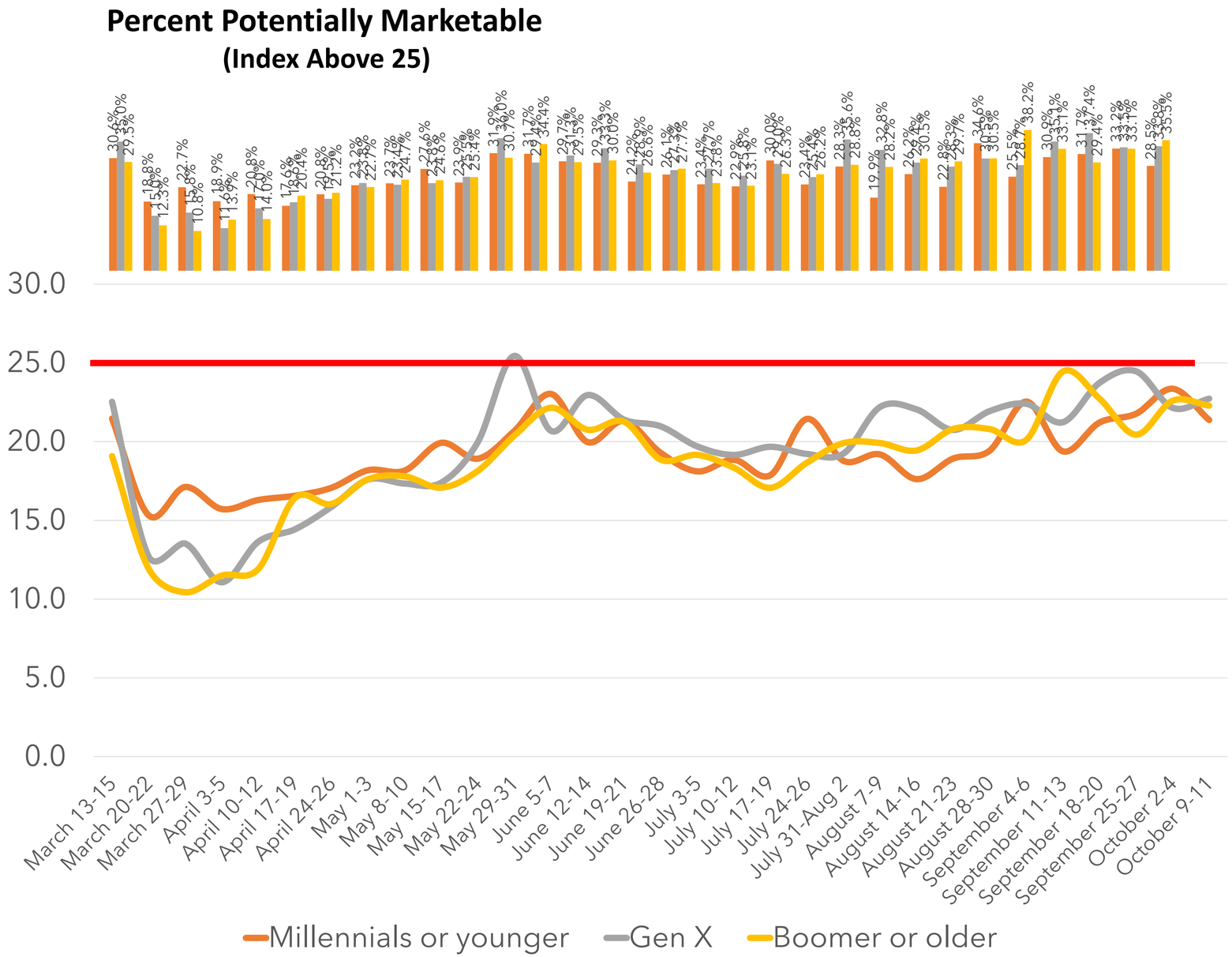


Percent Potentially Marketable
(Index Above 25)

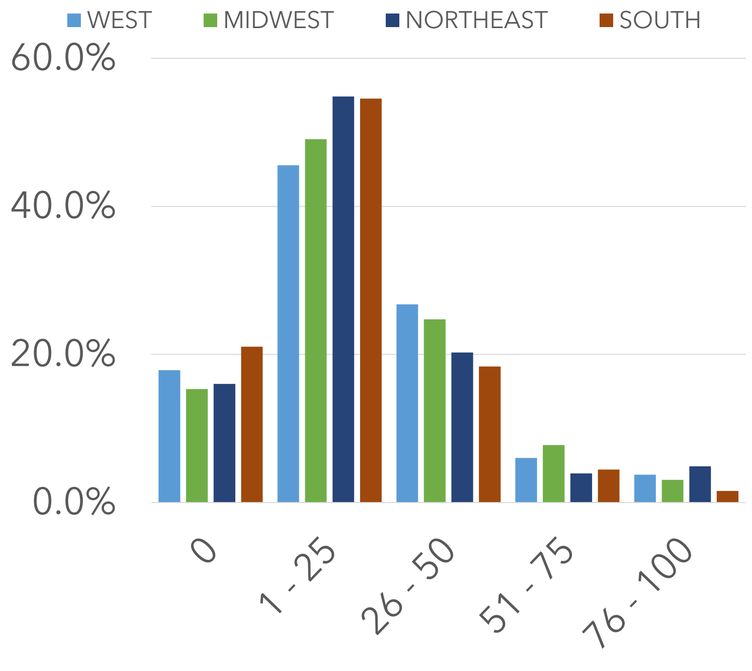


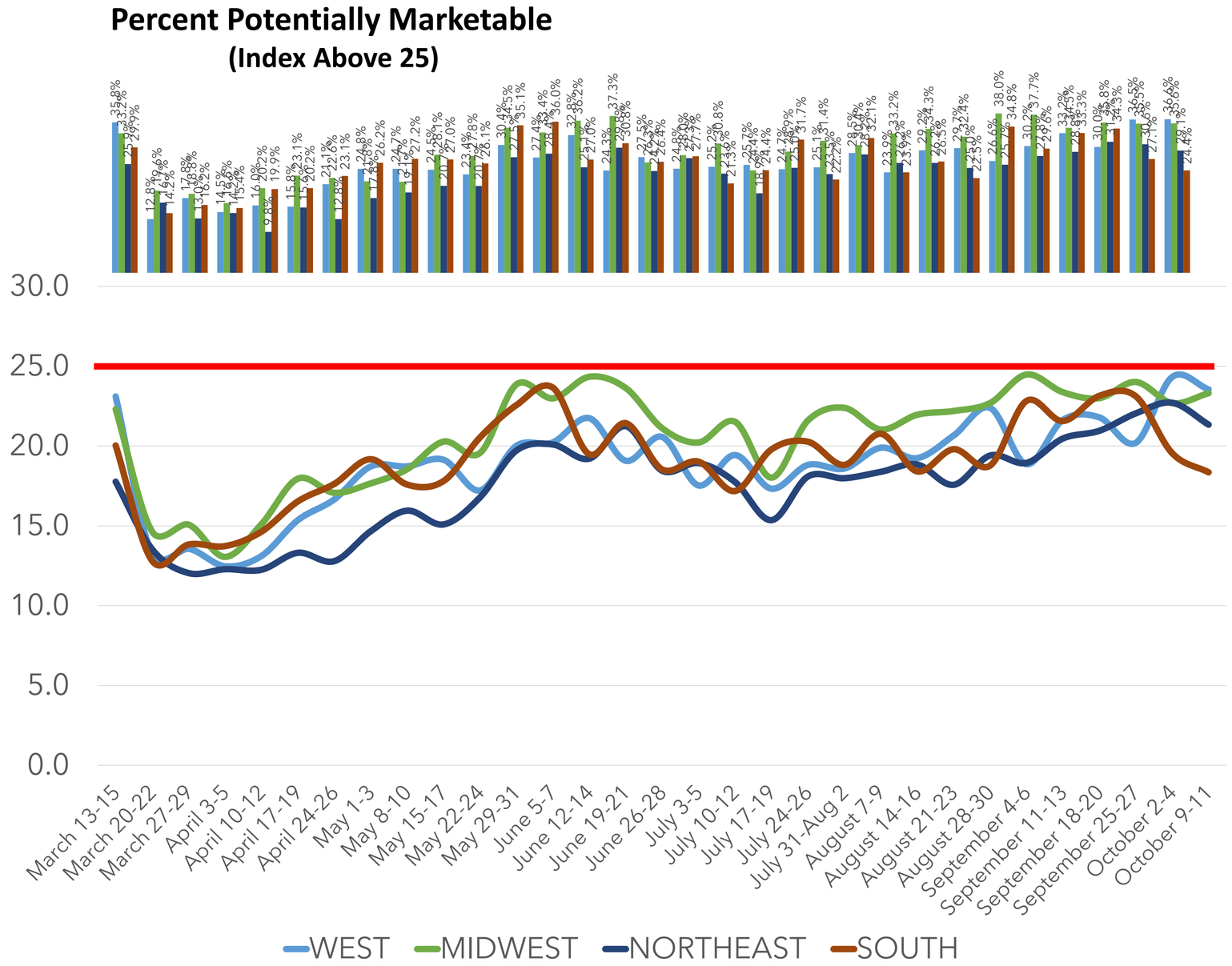
Generation


Millennials or younger
Gen X
Boomer or older
80.0%
60.0%
40.0%
20.0%
0.0%
0
1 - 25
26 - 50
51 - 75
76 - 100

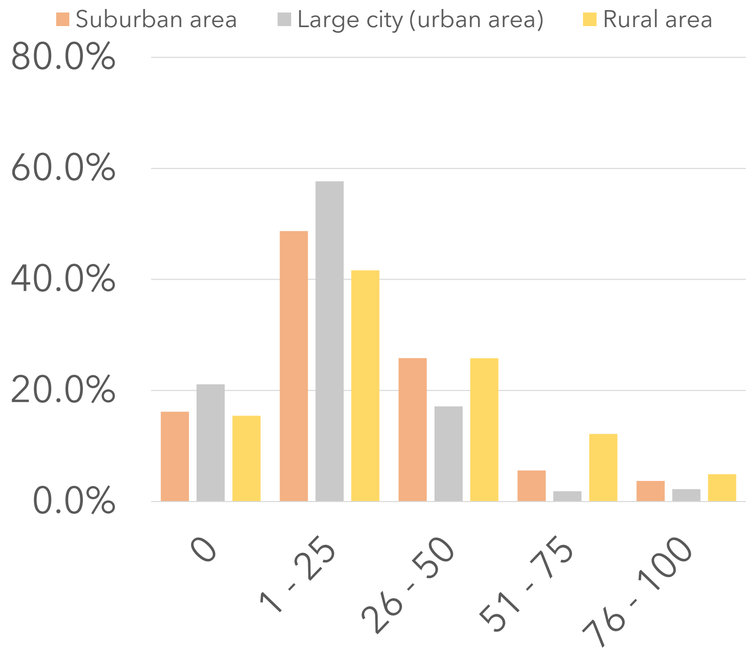

Percent Potentially Marketable
(Index Above 25)
30.0
25.0
20.0
15.0
10.0
5.0
0.0
March 13-15
March 20-22
March 27-29
April 3-5
April 10-12
April 17-19
April 24-26
May 1-3
May 8-10
May 15-17
May 22-24
May 29-31
June 5-7
June 12-14
June 19-21
June 26-28
July 3-5
July 10-12
July 17-19
July 24-26
July 31-Aug 2
August 7-9
August 14-16
August 21-23
August 28-30
September 4-6
September 11-13
September 18-20
September 25-27
October 2-4
October 9-11
Millennials or younger
Gen X
Boomer or older

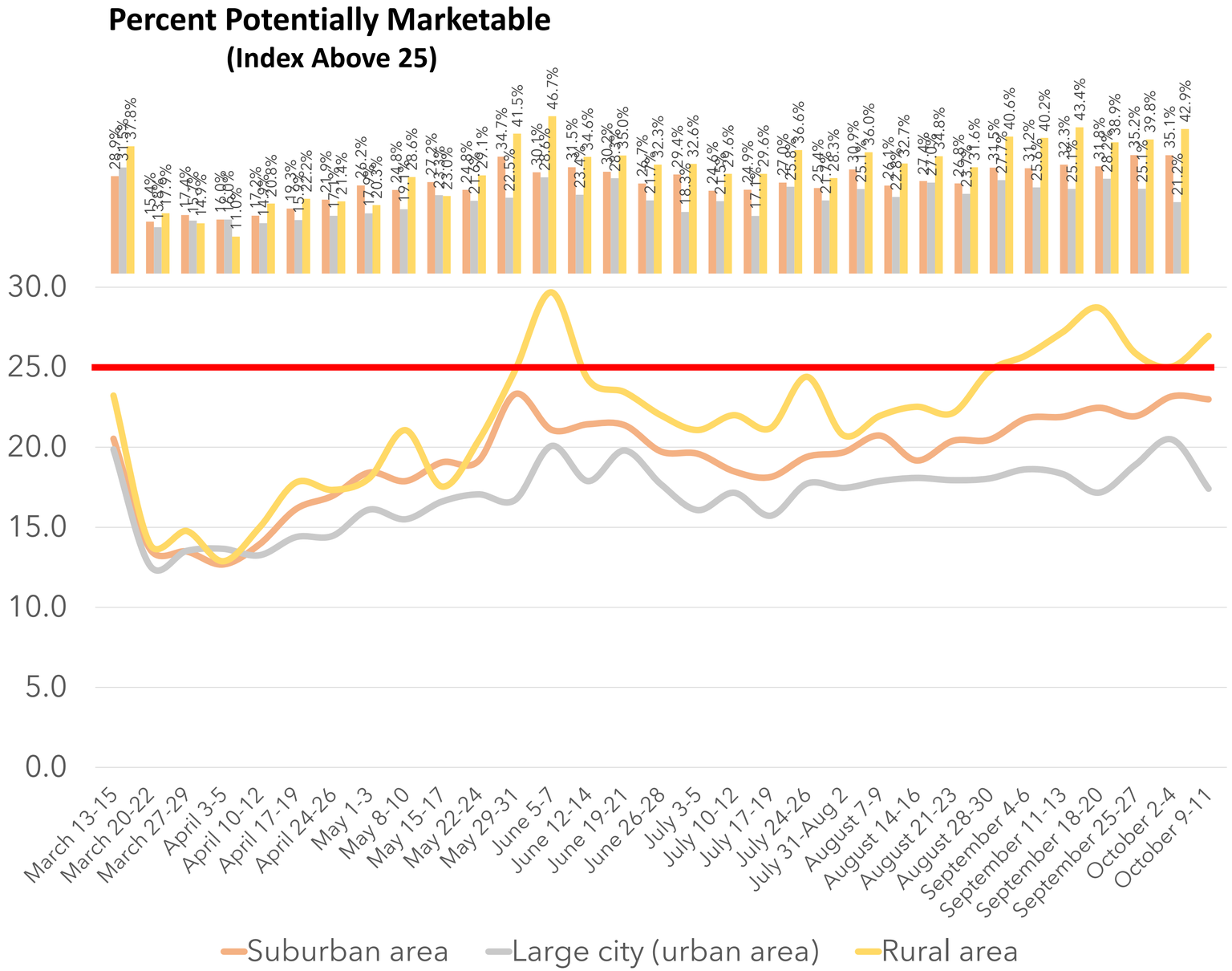
US Regions


WEST
MIDWEST
NORTHEAST
SOUTH
60.0%
40.0%
20.0%
0.0%
0
1 - 25
26 - 50
51 - 75
76 - 100

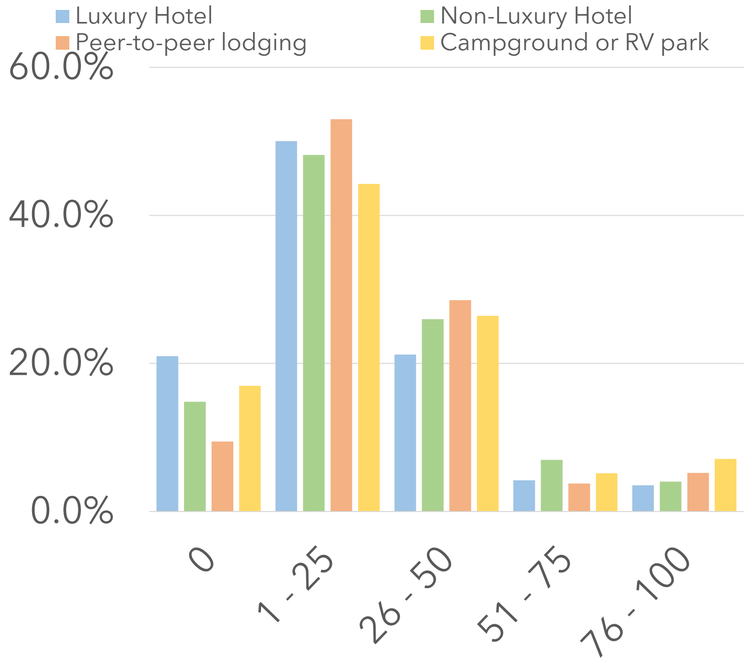

Percent Potentially Marketable
(Index Above 25)
30.0
25.0
20.0
15.0
10.0
5.0
0.0
March 13-15
March 20-22
March 27-29
April 3-5
April 10-12
April 17-19
April 24-26
May 1-3
May 8-10
May 15-17
May 22-24
May 29-31
June 5-7
June 12-14
June 19-21
June 26-28
July 3-5
July 10-12
July 17-19
July 24-26
July 31-Aug 2
August 7-9
August 14-16
August 21-23
August 28-30
September 4-6
September 11-13
September 18-20
September 25-27
October 2-4
October 9-11
WEST
MIDWEST
NORTHEAST
SOUTH

Residence Type

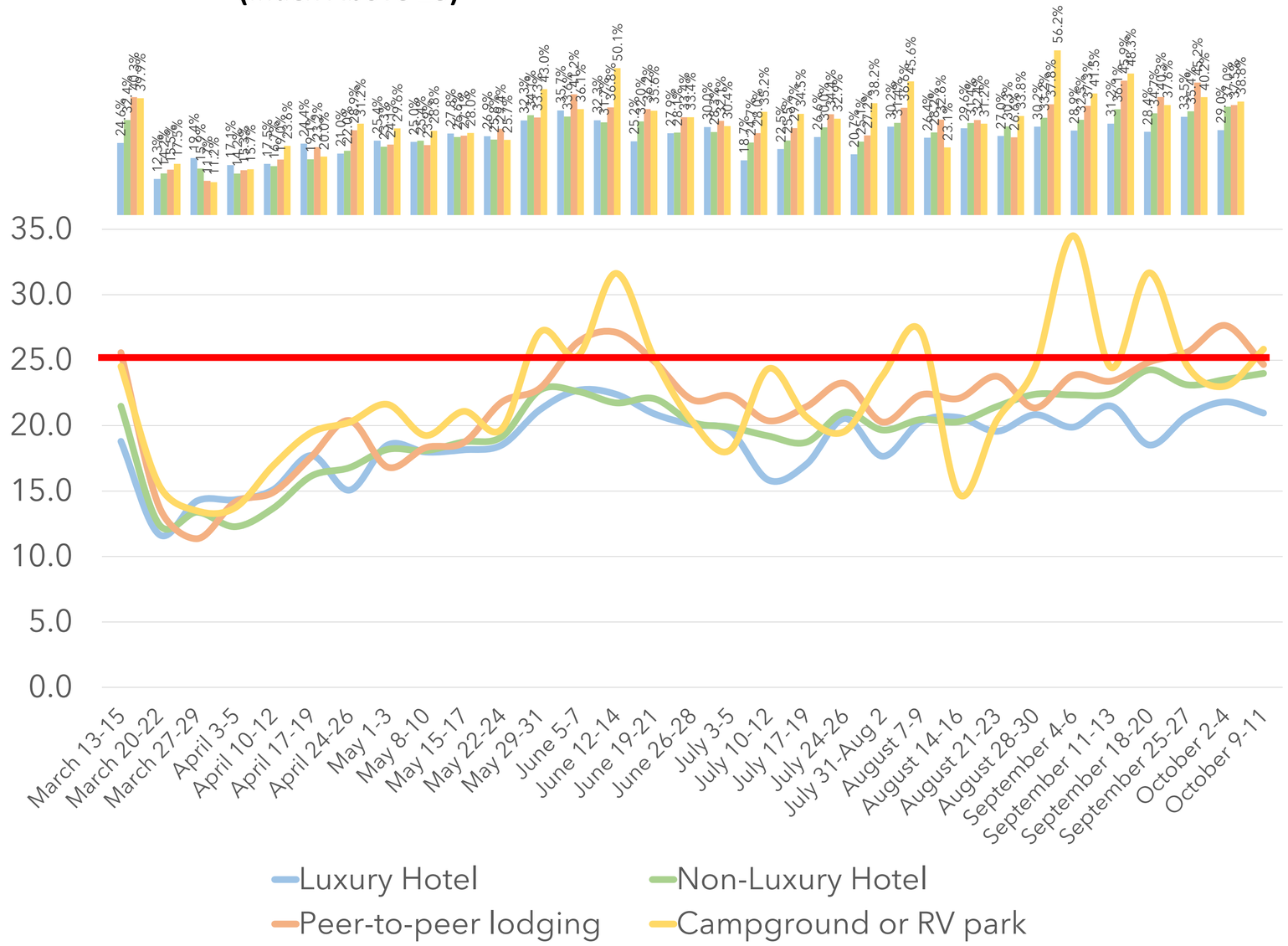




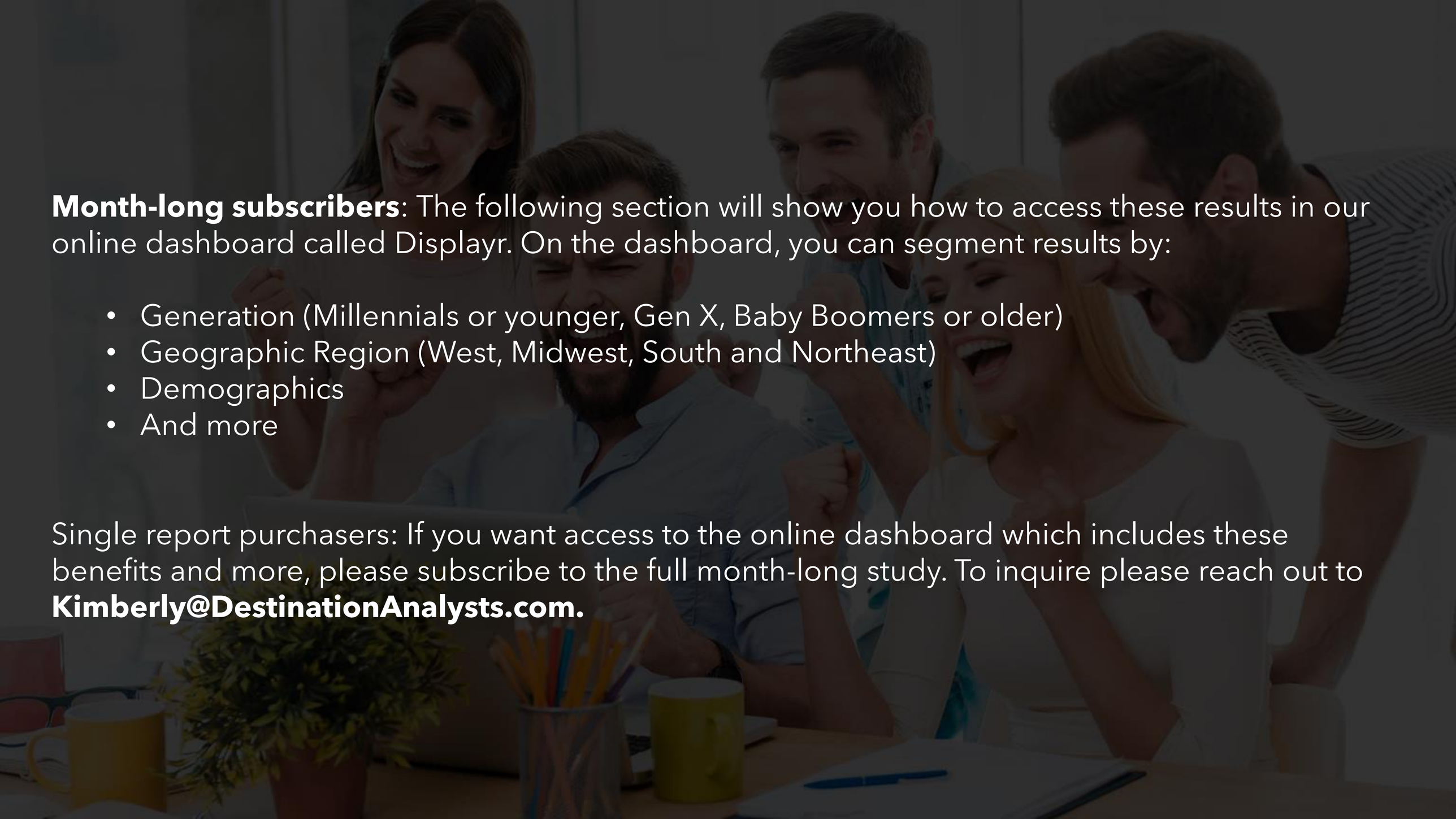
Lodging Preference



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

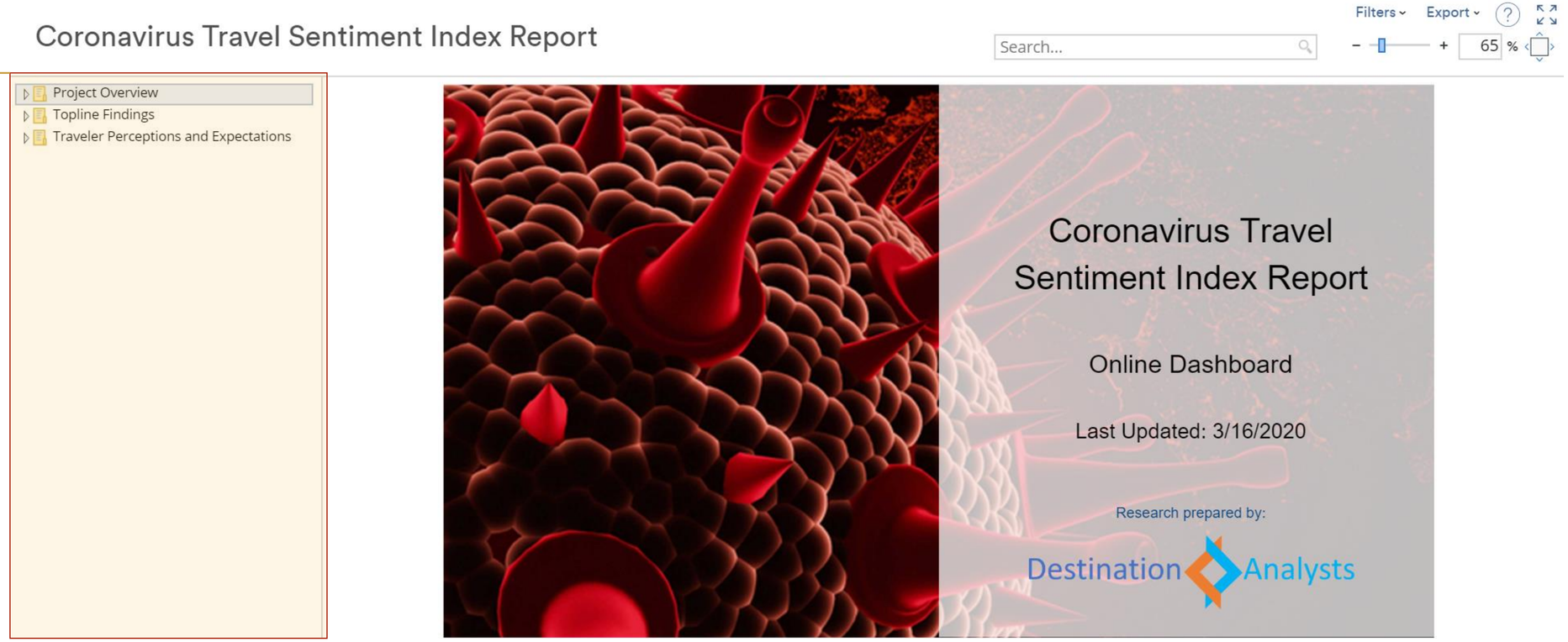
Single report purchasers: If you want access to the online dashboard which includes these benefits and more, please subscribe to the full month-long study. To inquire please reach out to **Kimberly@DestinationAnalysts.com.**

HOW TO USE DISPLYR

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

NAVIGATING THE DASHBOARD:

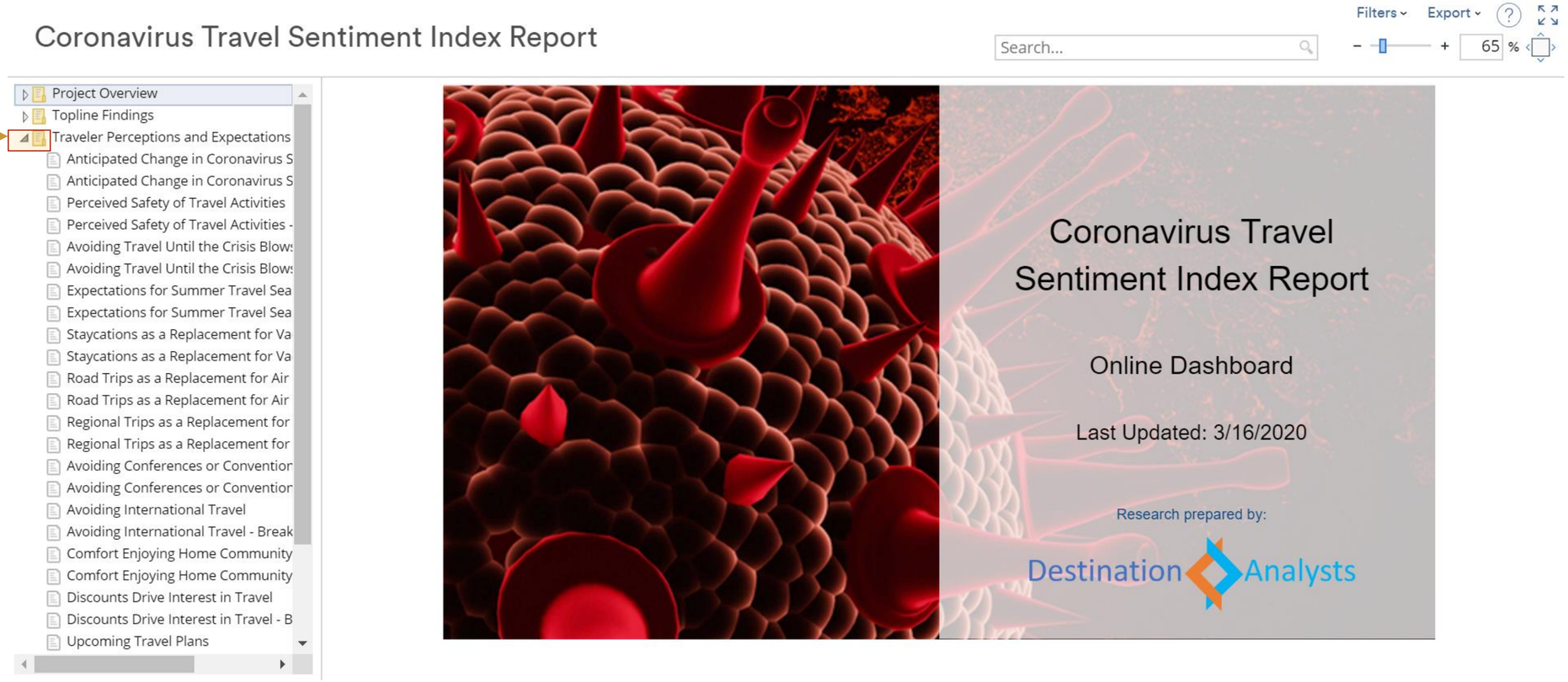
Toggle between the report sections by clicking on the header(s) in this navigation pane



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.



FILTERING THE REPORT:

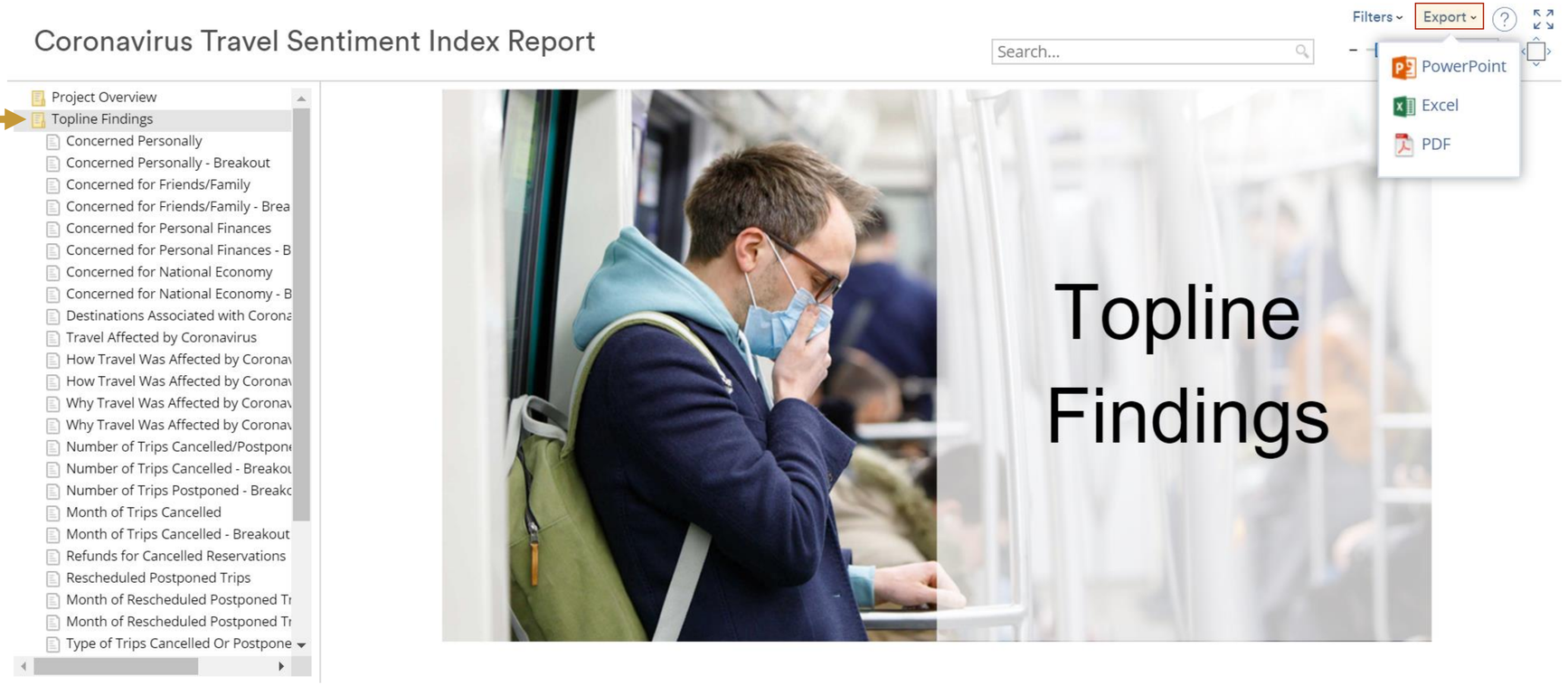
To segment the results by a specific group (generational, geographical, etc.)
Click on “Filters” in the top right corner.

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”

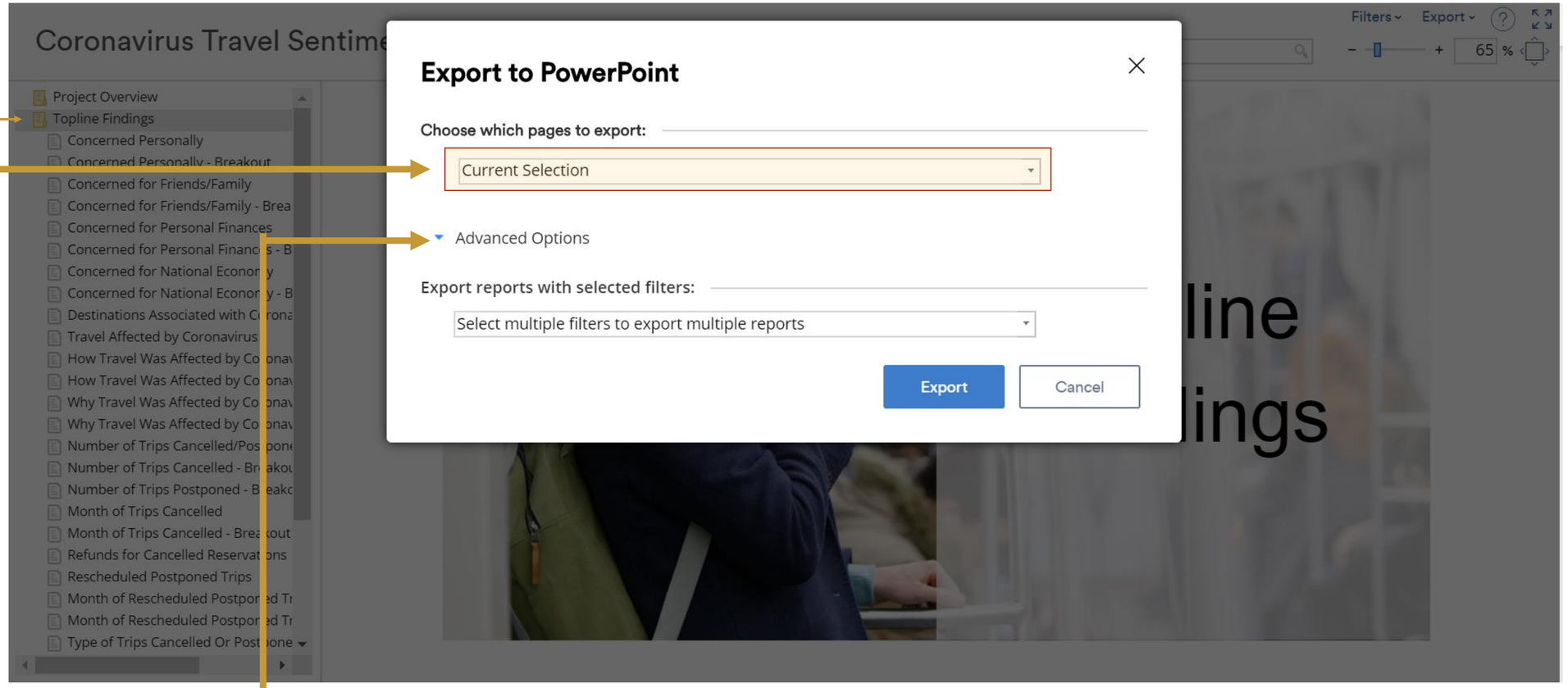


EXPORTING THE DATA:

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:

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Research Manager
Chingun@DestinationAnalysts.com
(415) 722-2503