



# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**PRESENTATION OF FINDINGS  
WEEK OF JULY 20<sup>TH</sup>, 2020**

Destination  Analysts





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

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



# RESEARCH OVERVIEW & METHODOLOGY

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 19 data (fielded July 17-19) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S. Regions





## IMPORTANT

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

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## Cases in the U.S.

Updated July 18, 2020

Languages ▾

Print

TOTAL CASES  
**3,630,587**

74,710 New Cases\*

TOTAL DEATHS  
**138,782**

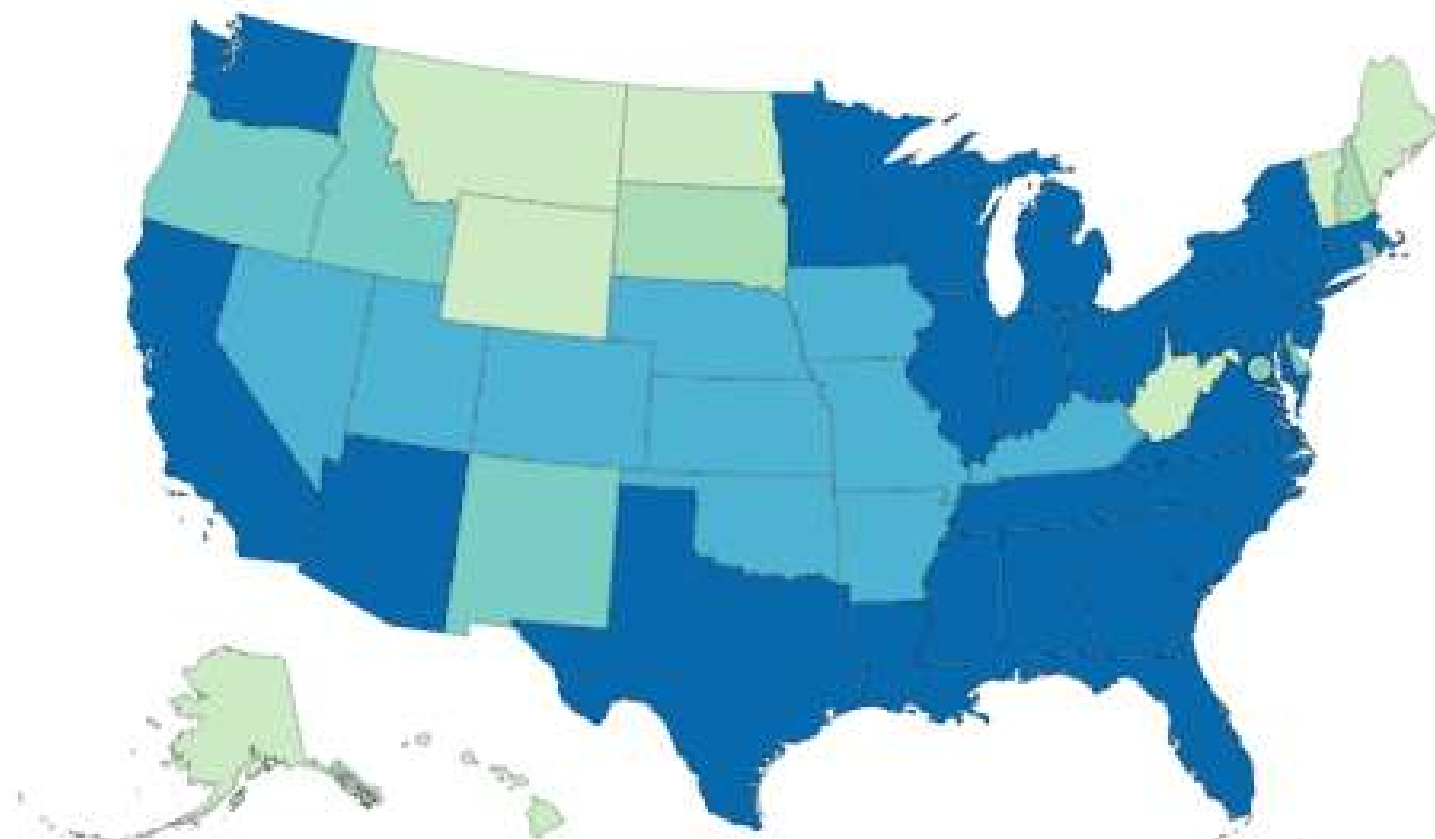
918 New Deaths\*

\*Compared to yesterday's data

[About the Data](#)

### Reported Cases

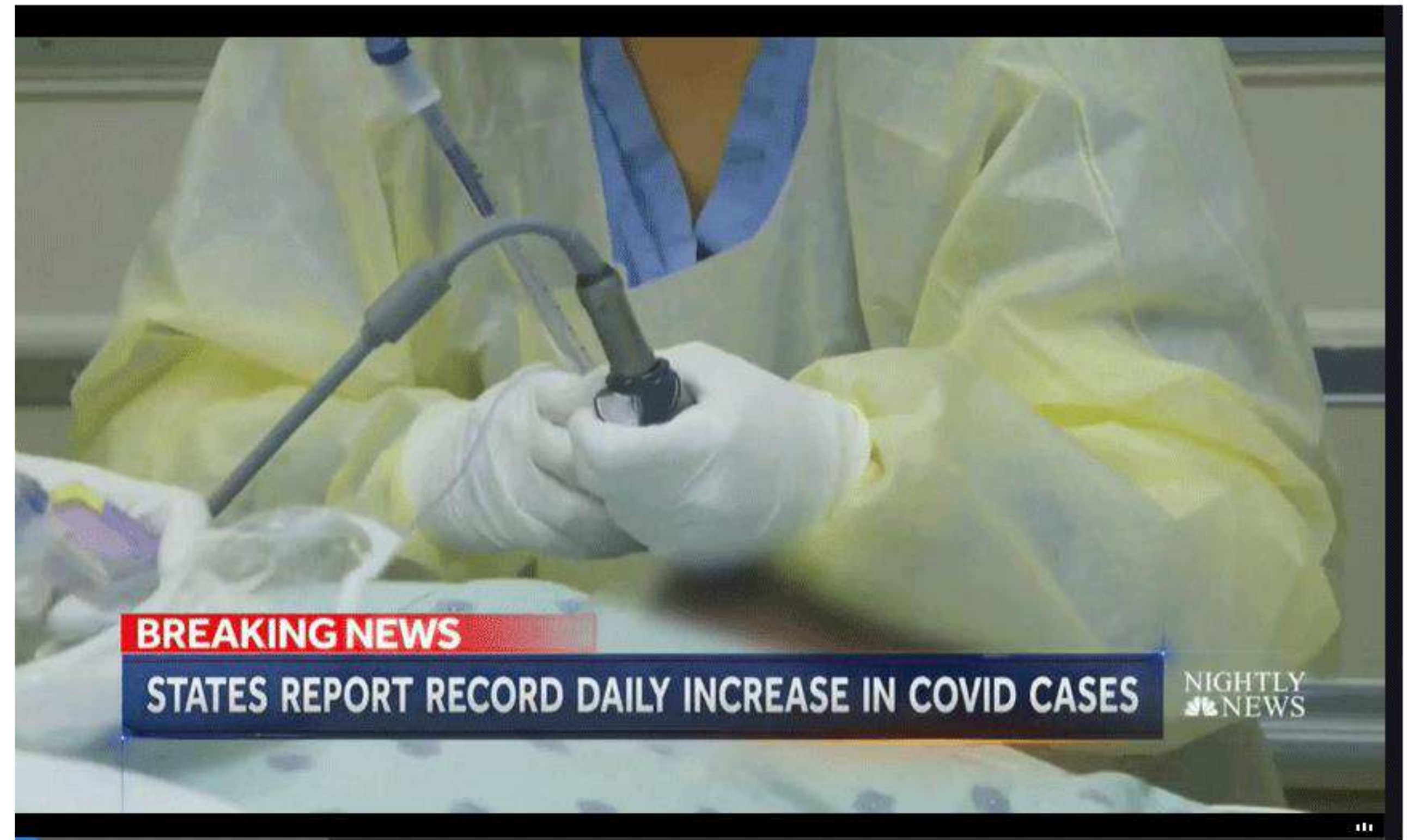
- 0 to 1,000
- 1,001 to 5,000
- 5,001 to 10,000
- 10,001 to 20,000
- 20,001 to 40,000
- 40,001 or more



## Florida and Texas hospitals overwhelmed as coronavirus cases surge



NBCU • July 18, 2020



**BREAKING NEWS**

**STATES REPORT RECORD DAILY INCREASE IN COVID CASES**

NIGHTLY NEWS  
7P





Trump Doesn't Want To Be 'Distracted' By Pandemic Adviser Tells WAPO | The 11th Hour | MSNBC







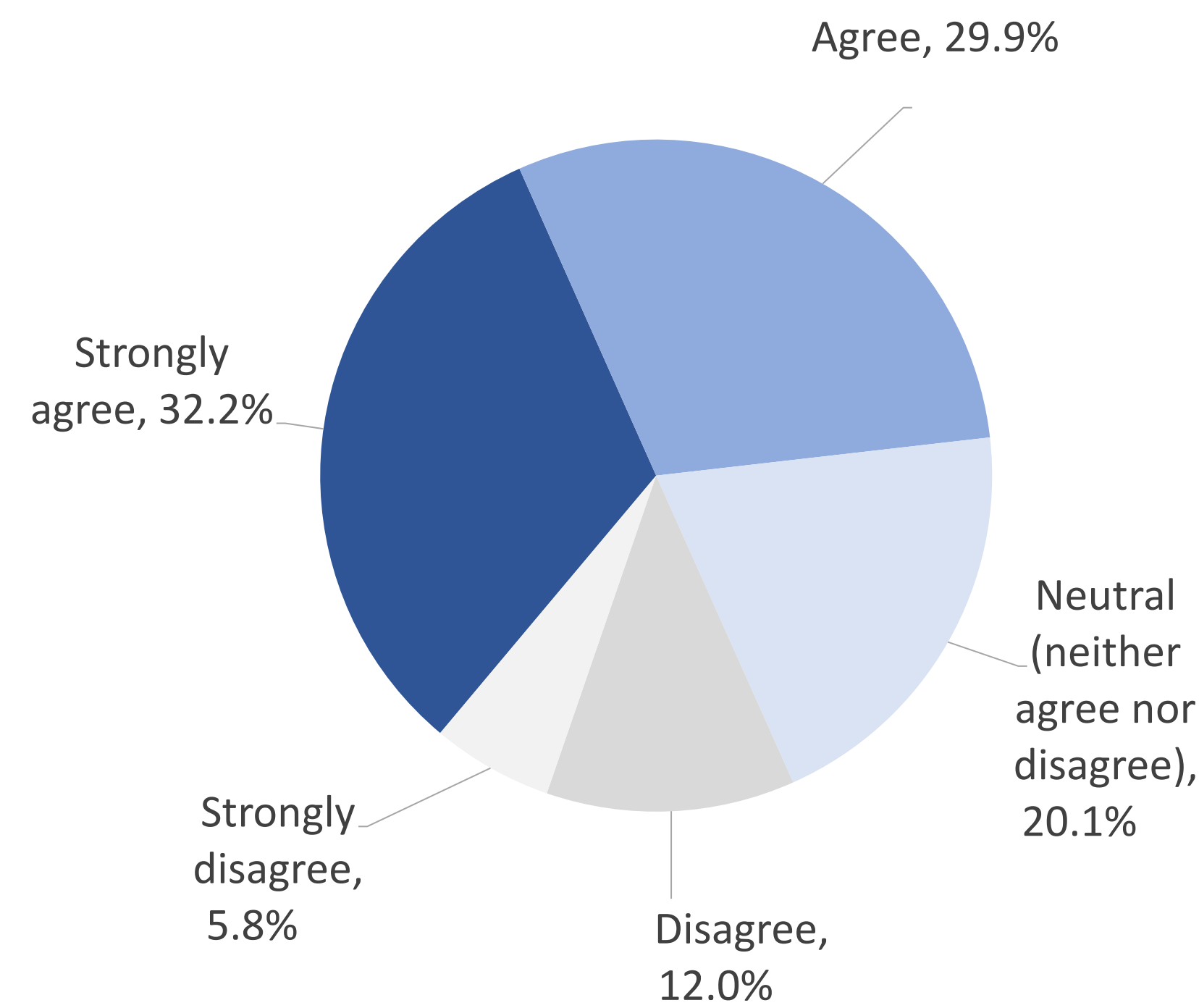
**HOW WE FEEL  
ABOUT TRAVEL NOW**



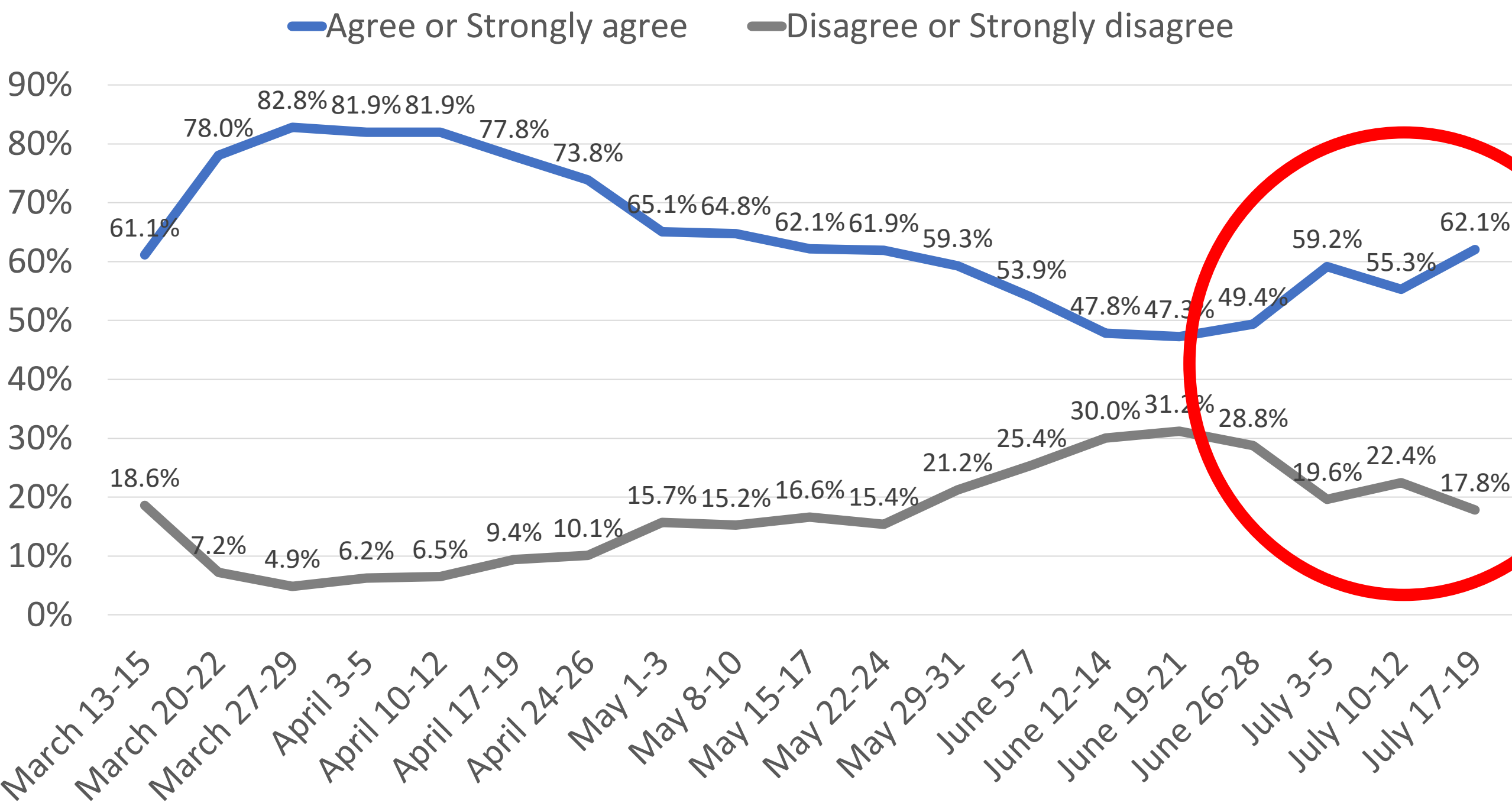
# AVOIDING TRAVEL UNTIL THE CRISIS BLOWS OVER

How much do you agree with the following statement?

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



Historical data



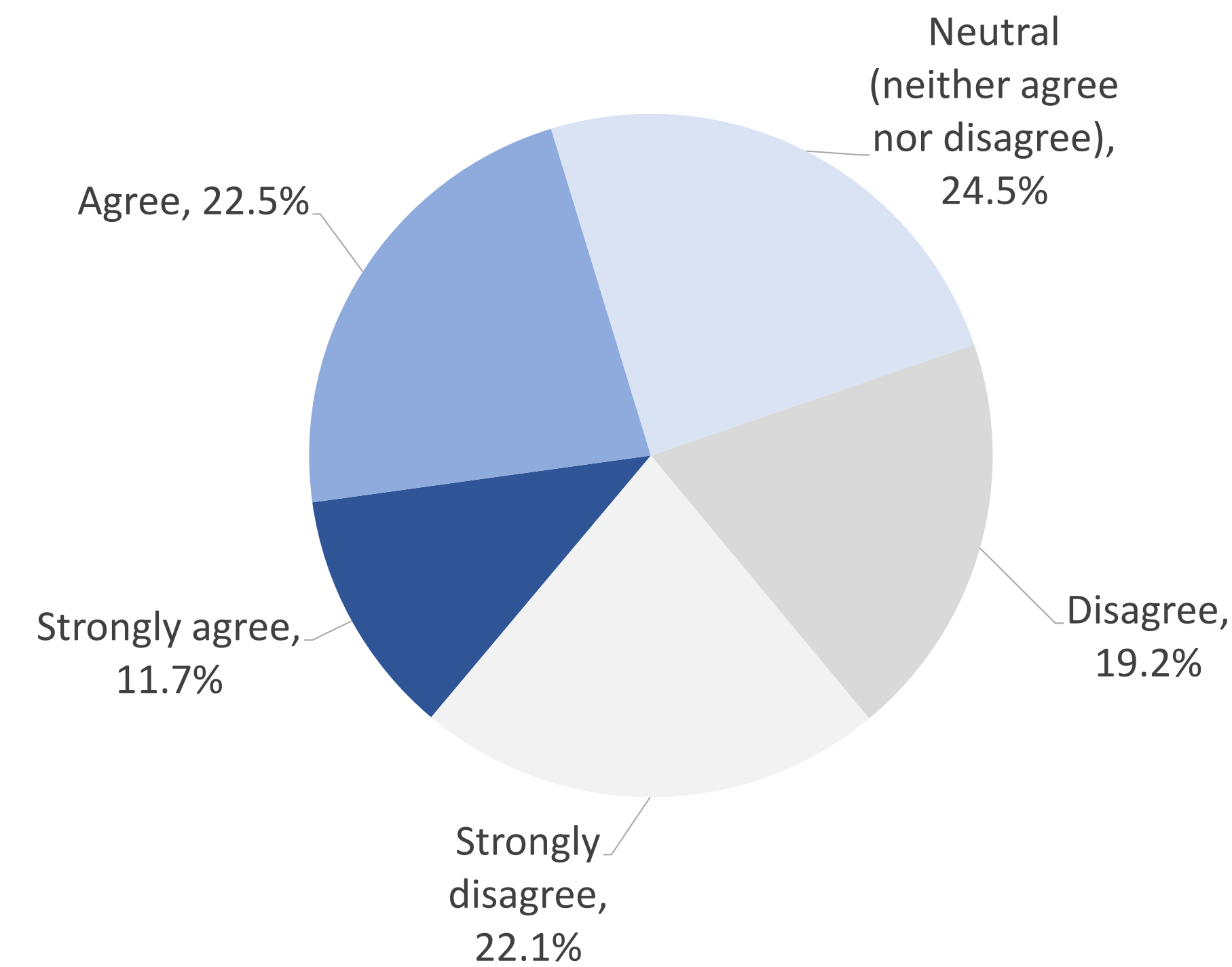
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)



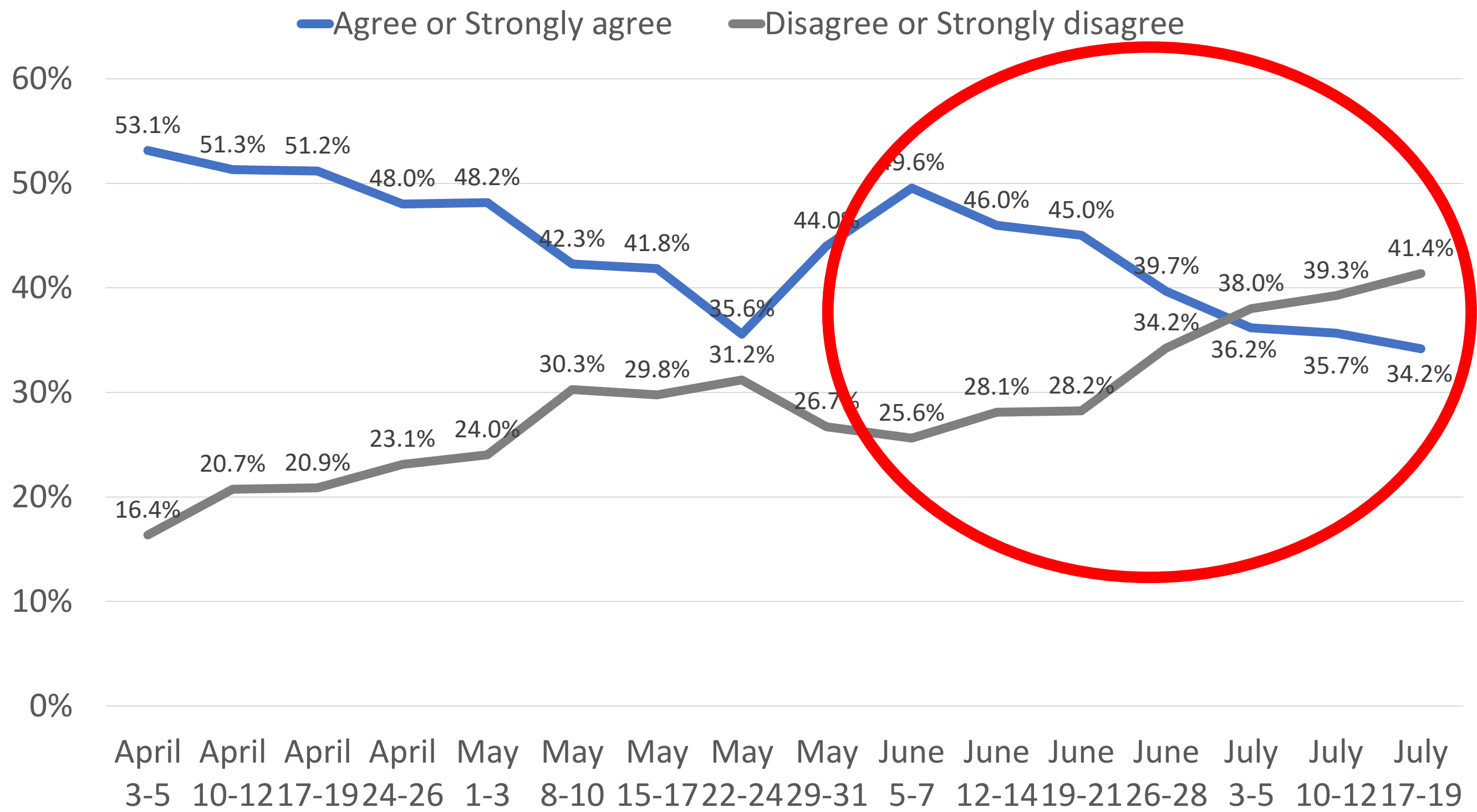
# EXPECTATIONS FOR TRAVELING IN THE FALL

How much do you agree with the following statement?

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



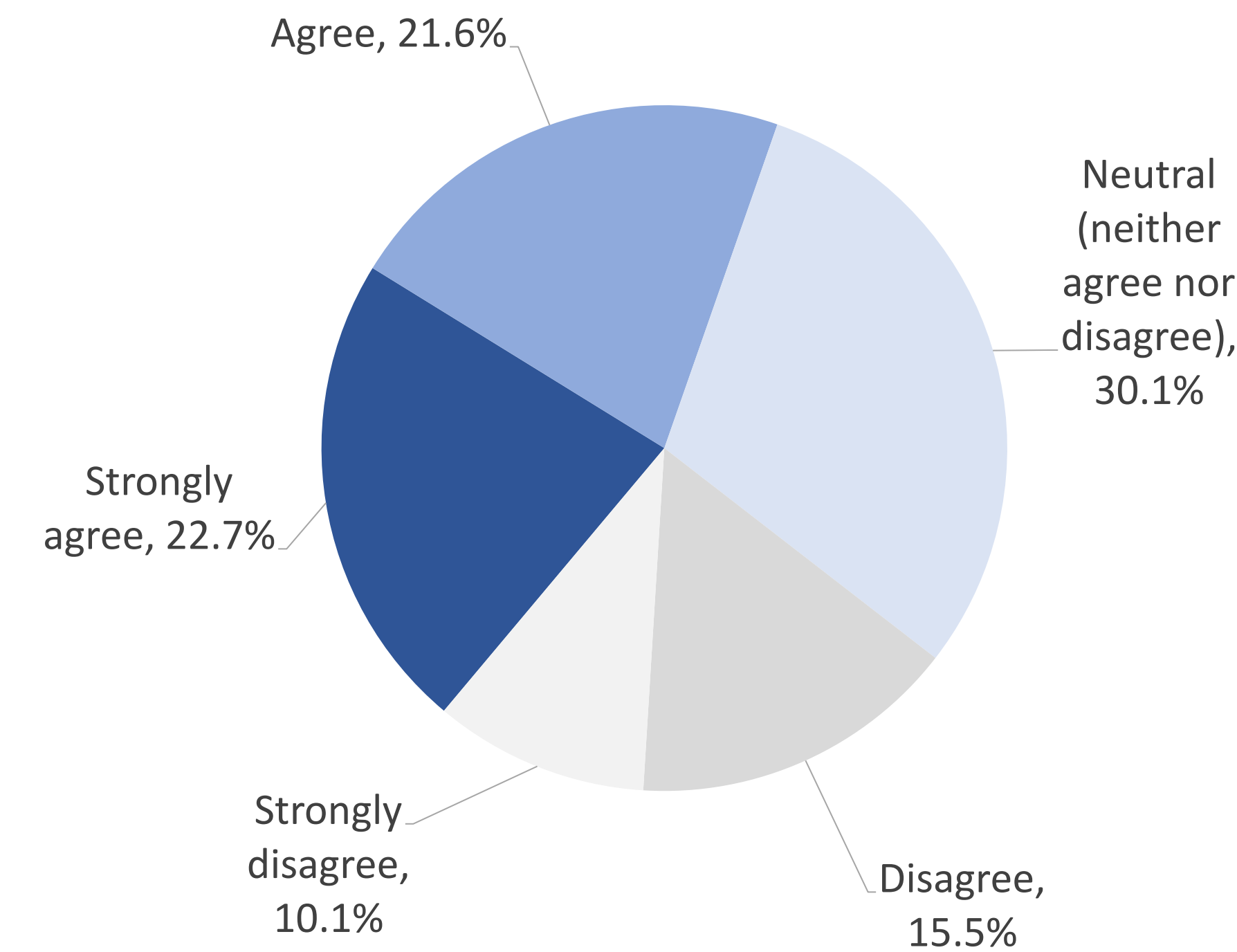
Historical data



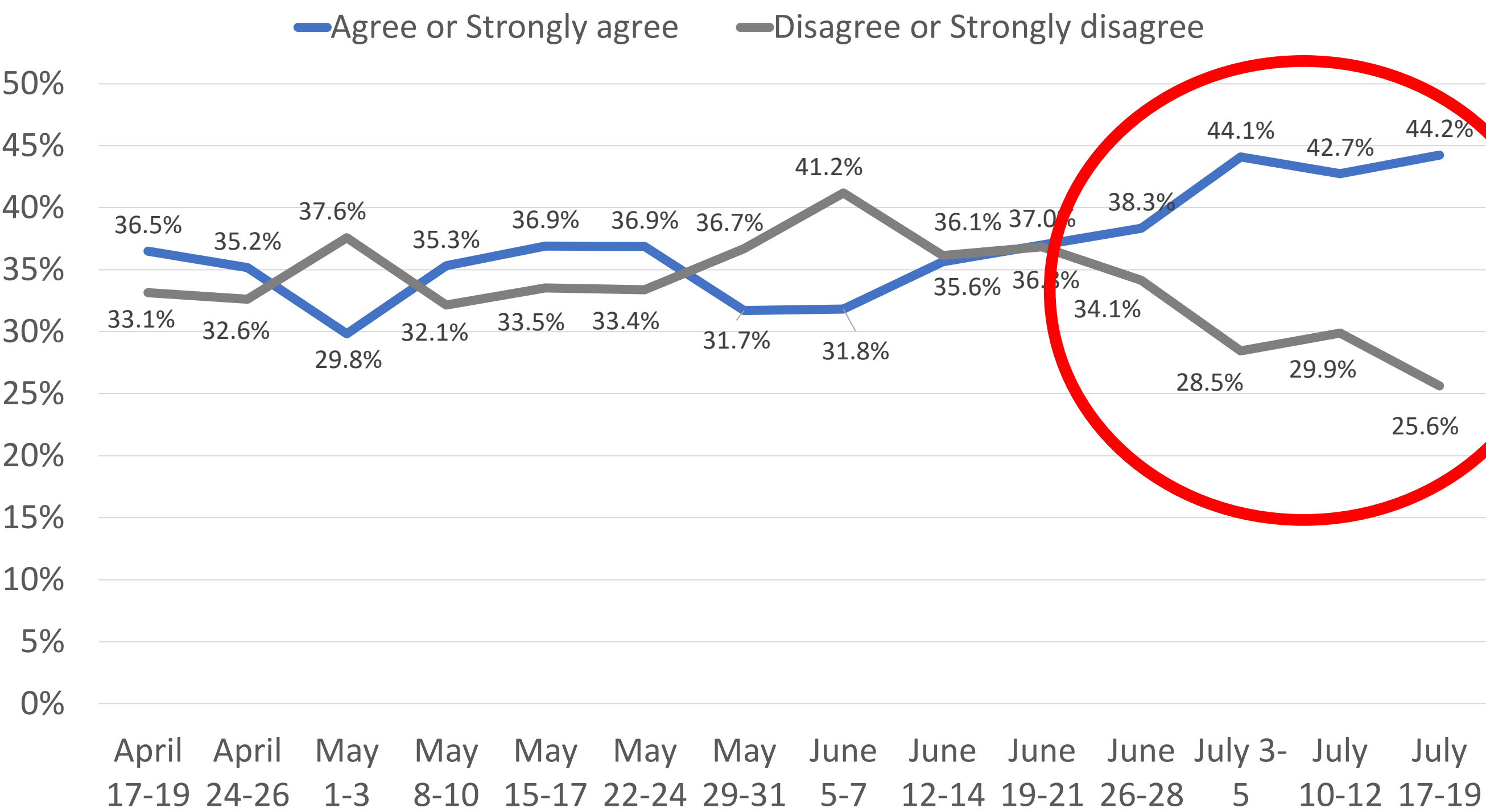


# WON'T TRAVEL WITHOUT VACCINE

How much do you agree with the following statement?  
**Statement:** I'm not traveling until there is a vaccine.



Historical data



(Base: 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 and 1,200 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 , July 3-5, 10-12 and 17-19, 2020)



**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

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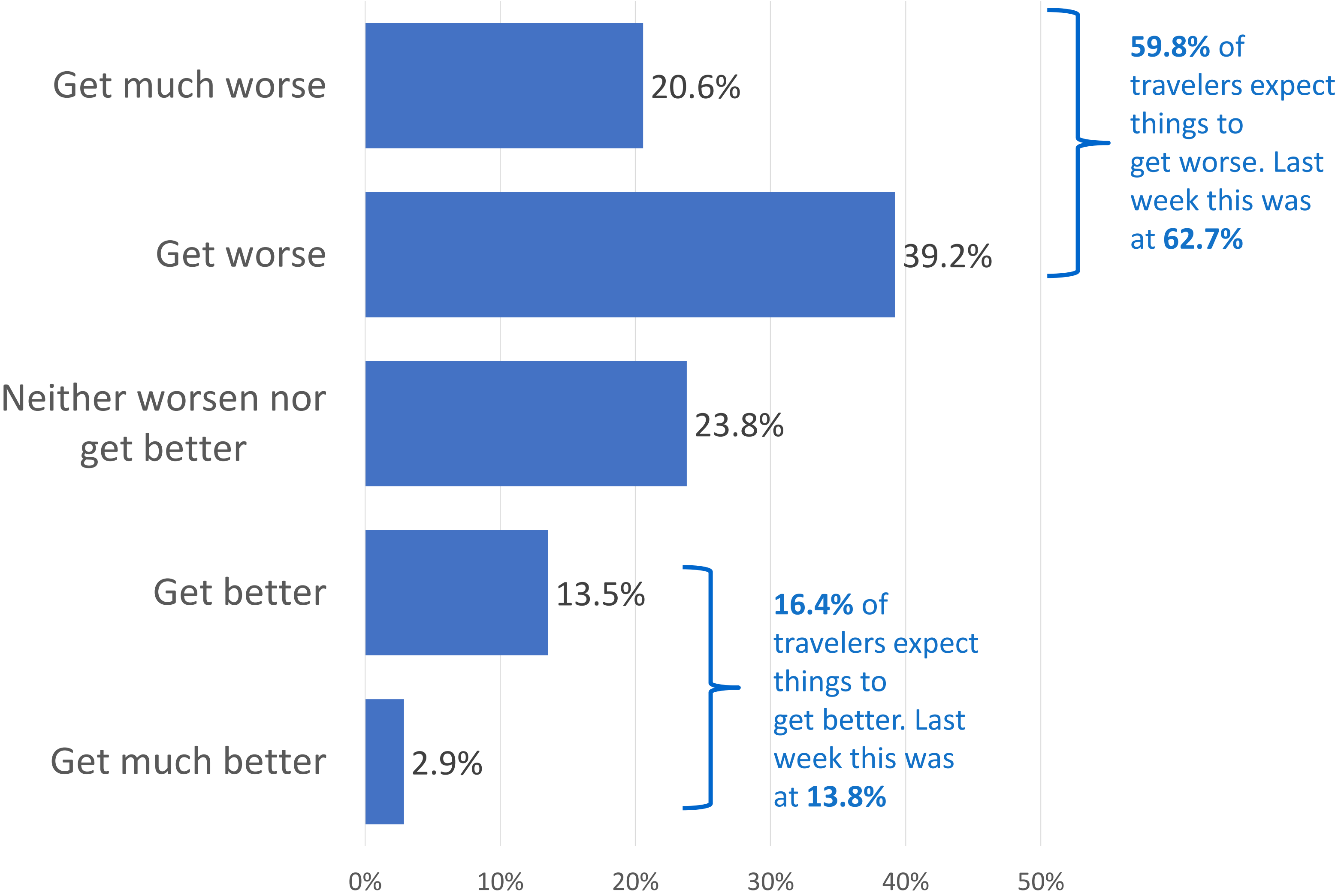


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

**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)

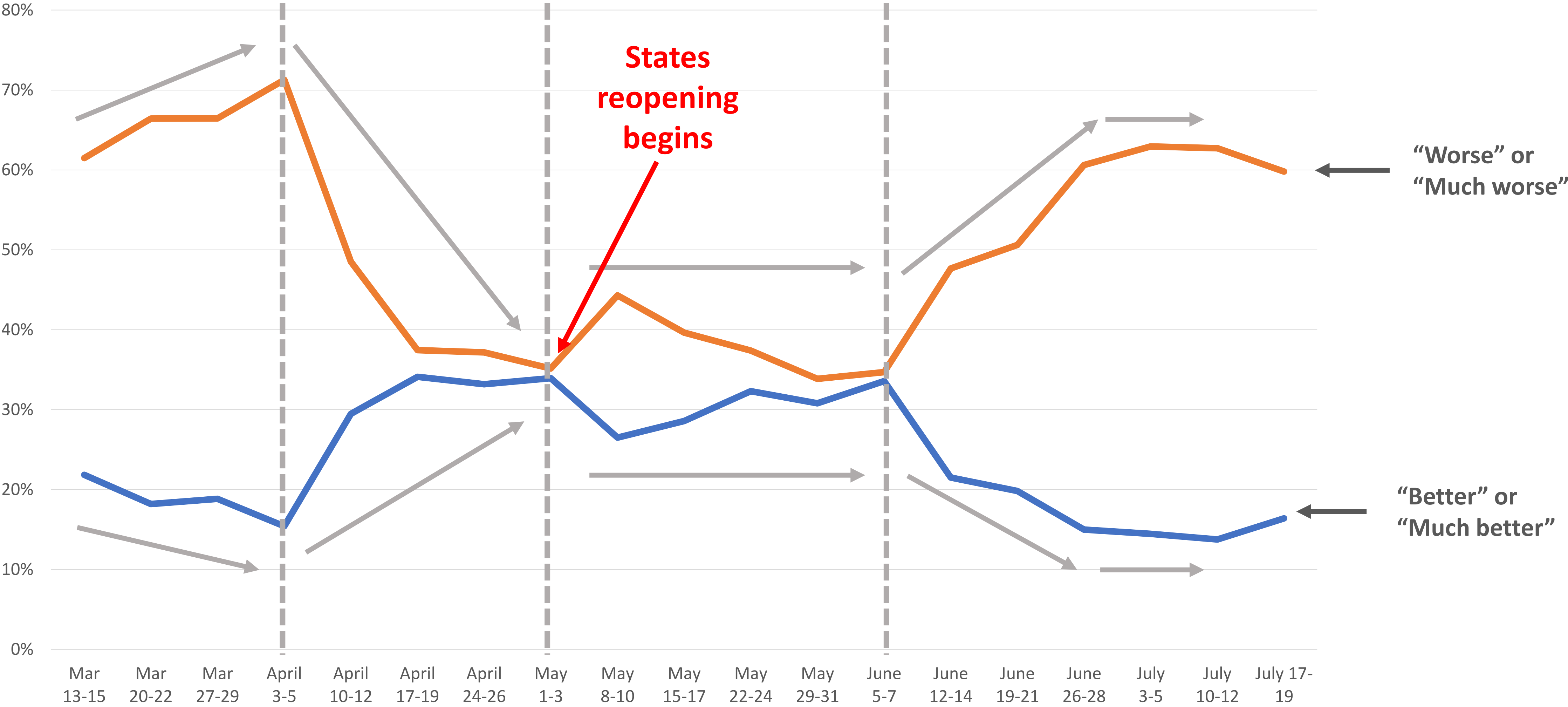
In the next month the coronavirus situation will \_\_\_\_\_

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



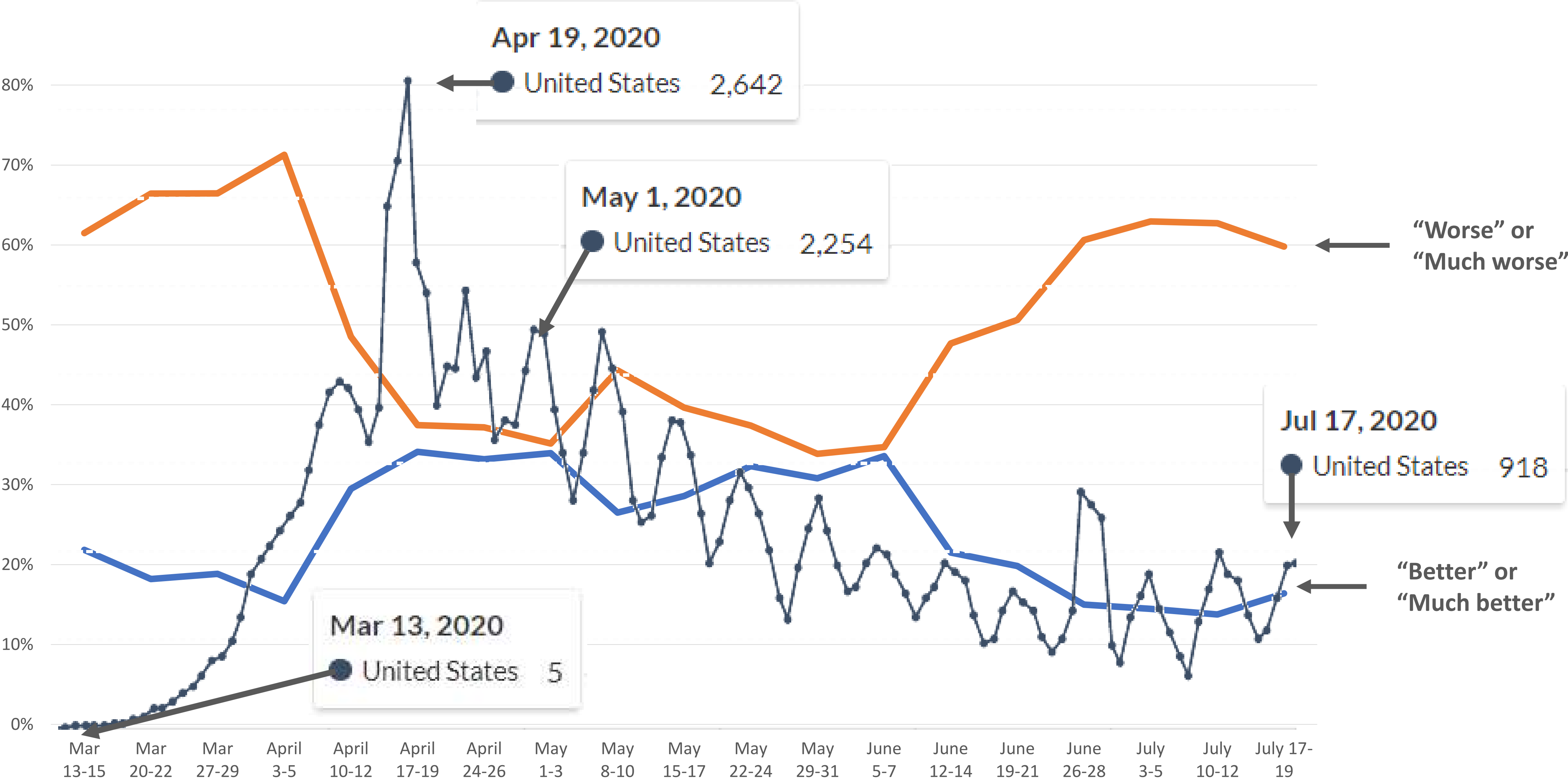


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK



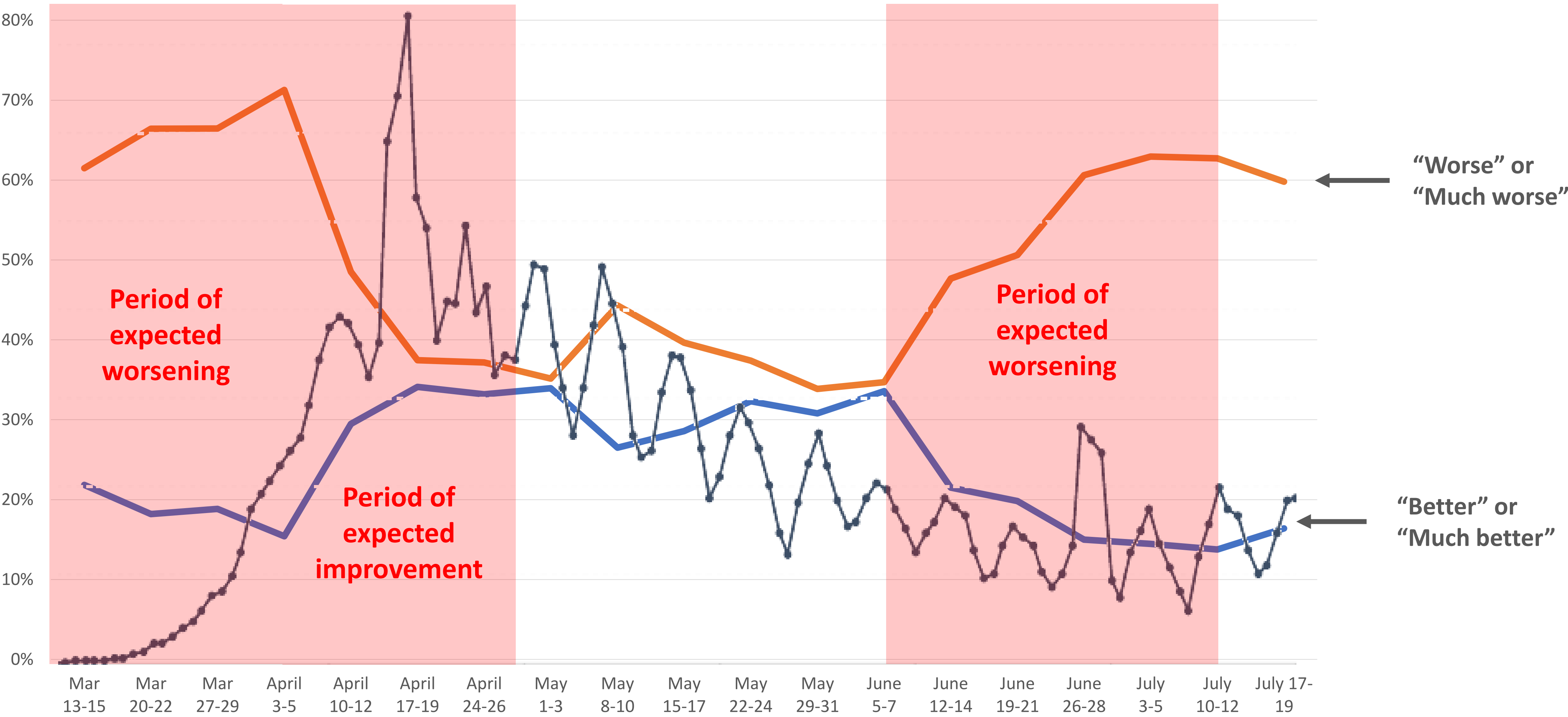


# EXPECTATIONS VS. CORONAVIRUS DEATHS (PER DAY)





# EXPECTATIONS VS. CORONAVIRUS DEATHS (PER DAY)





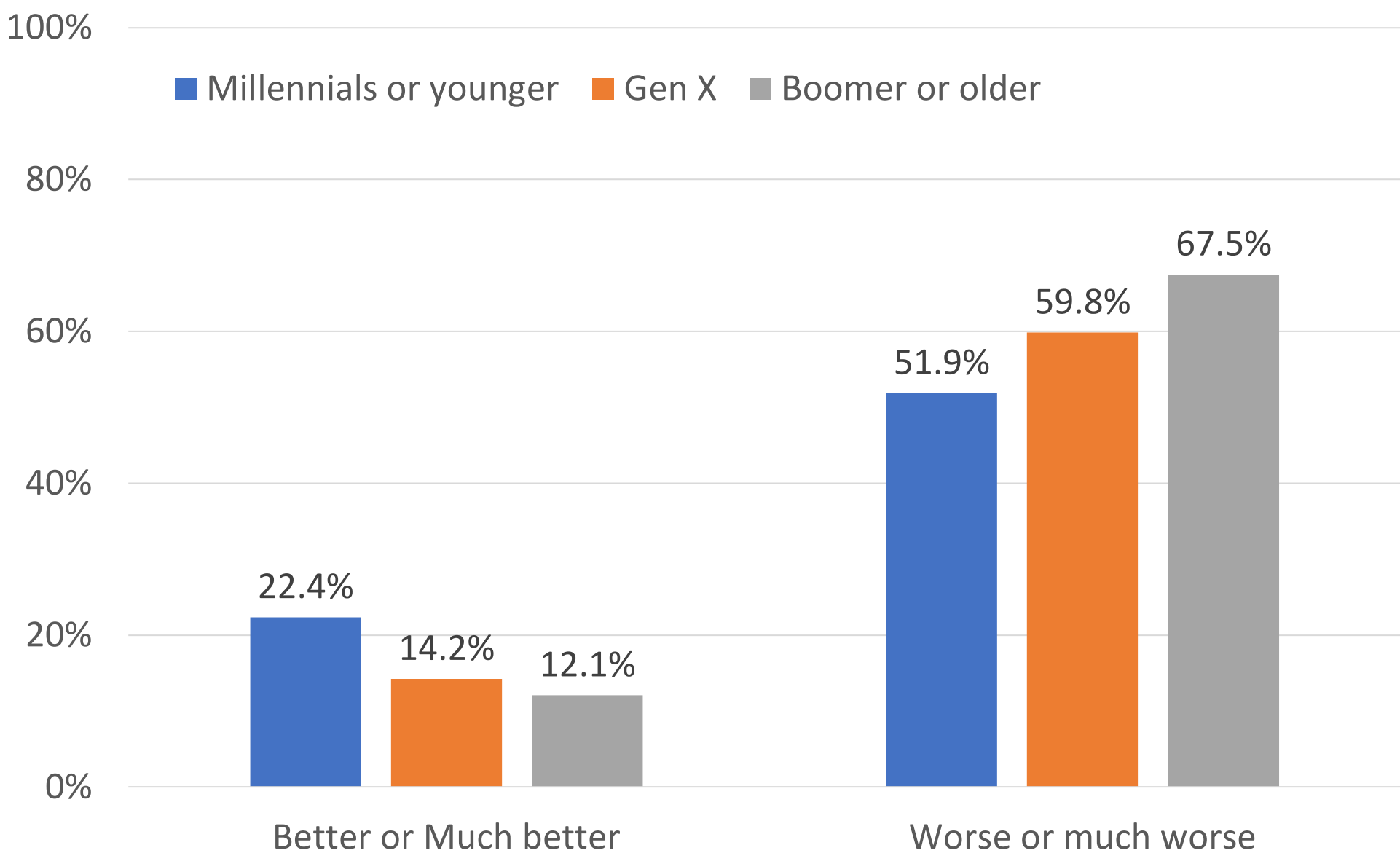


**WHO ARE THE OPTIMISTIC ONES?**

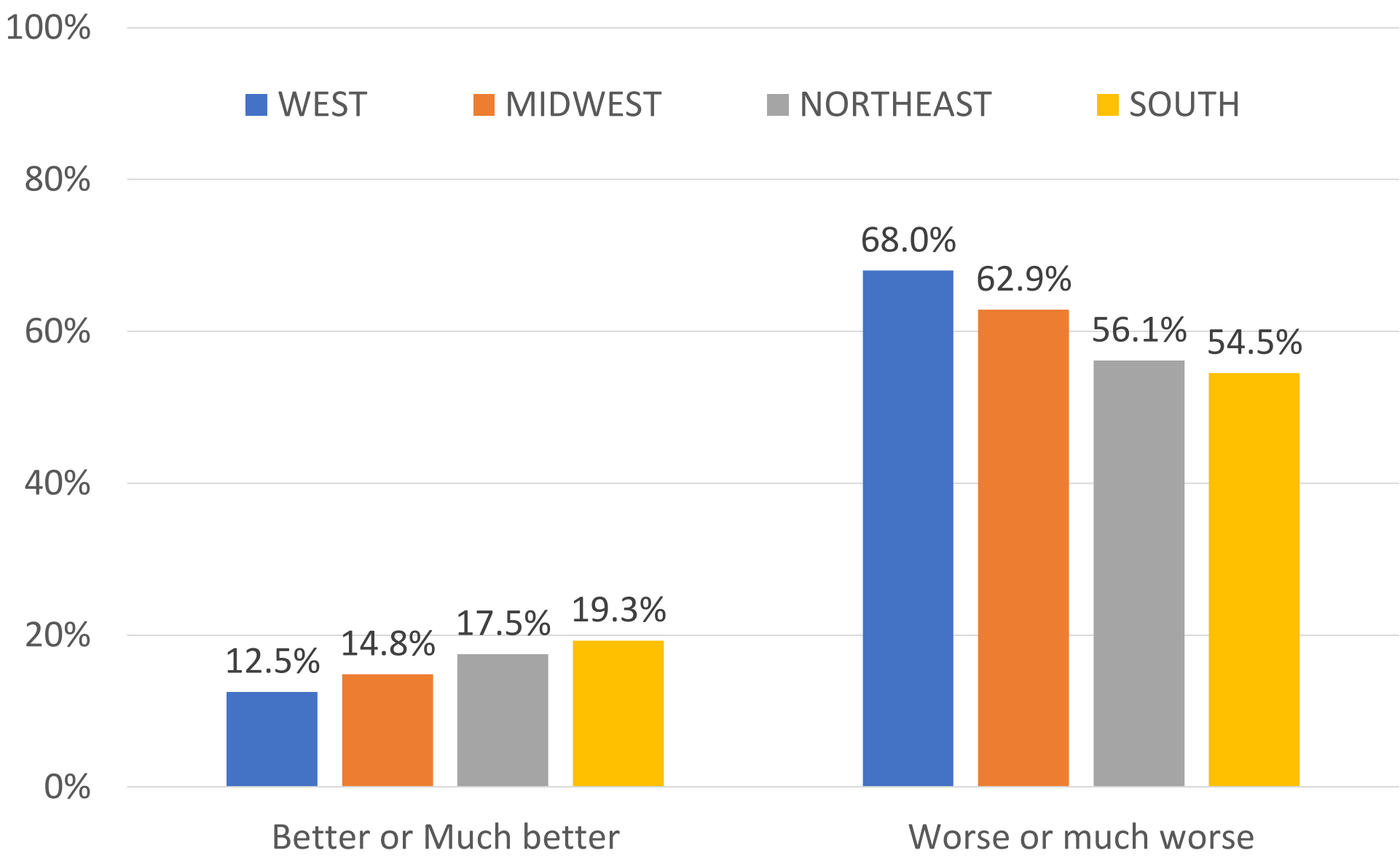


# WHO IS MORE OPTIMISTIC?

Millennials & Gen Z



The South & Northeast



**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 \_\_\_\_\_

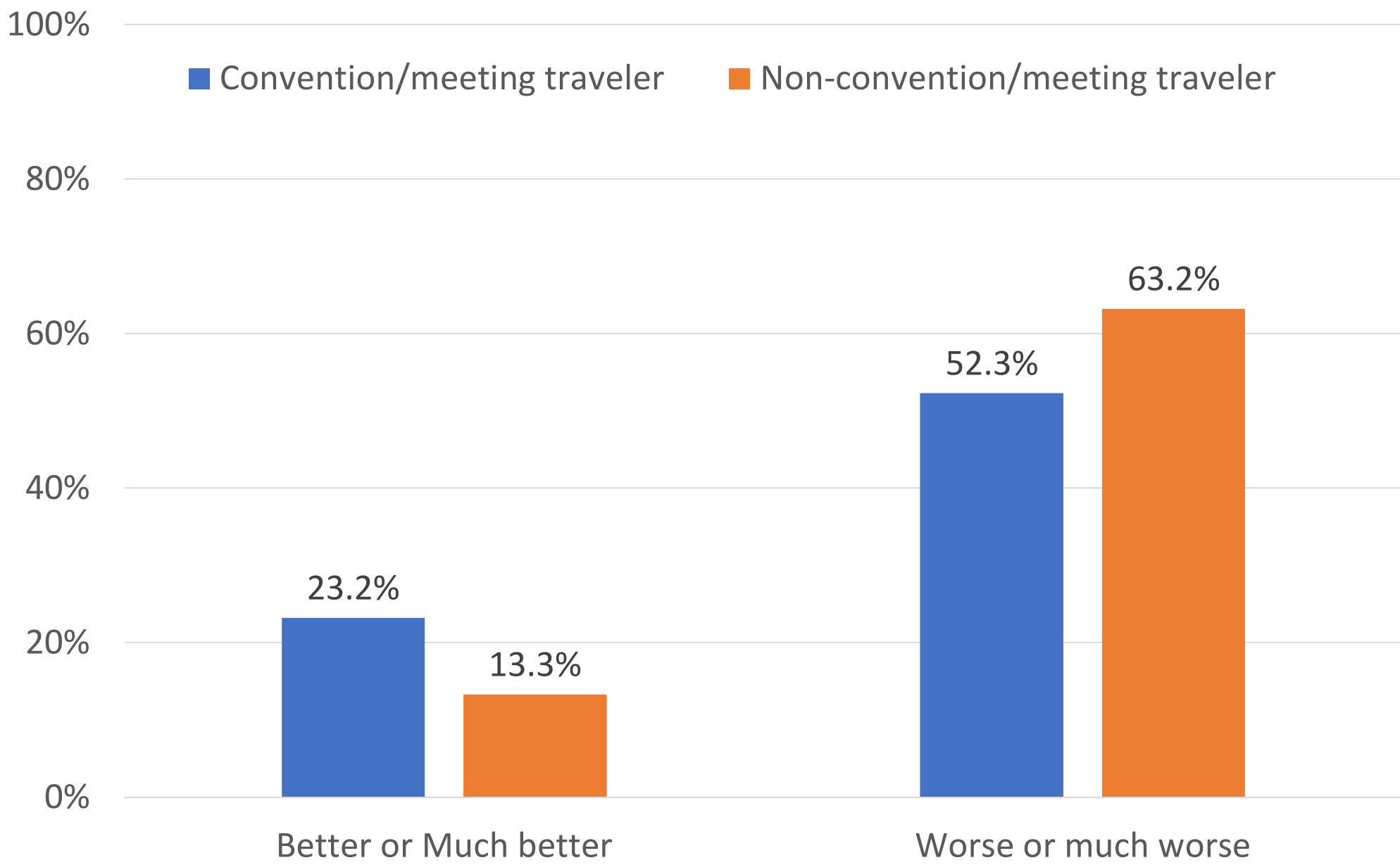


# WHO IS MORE OPTIMISTIC?

## Business Travelers



## Conventioners & Meetings Travelers



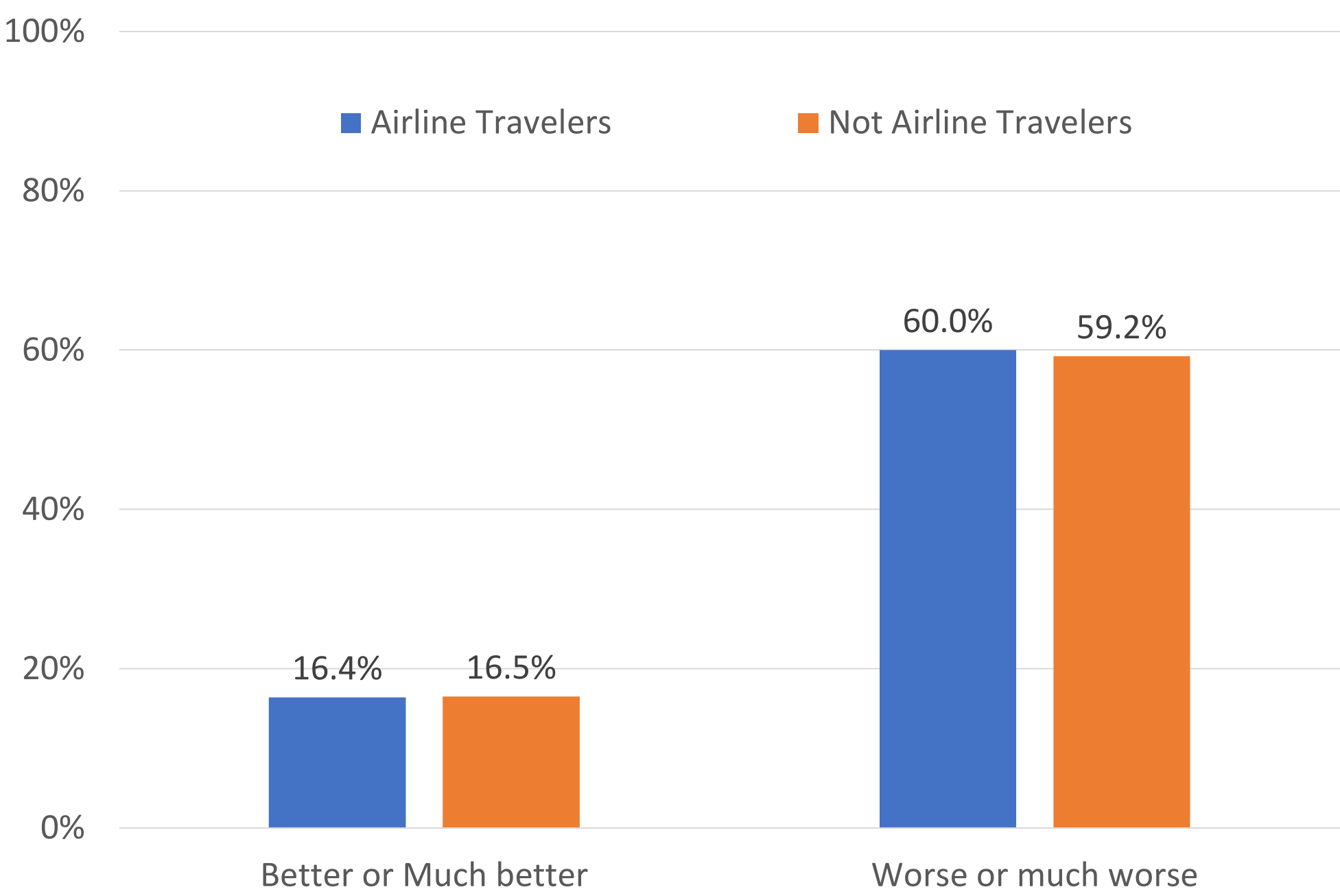
**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will \_\_\_\_\_

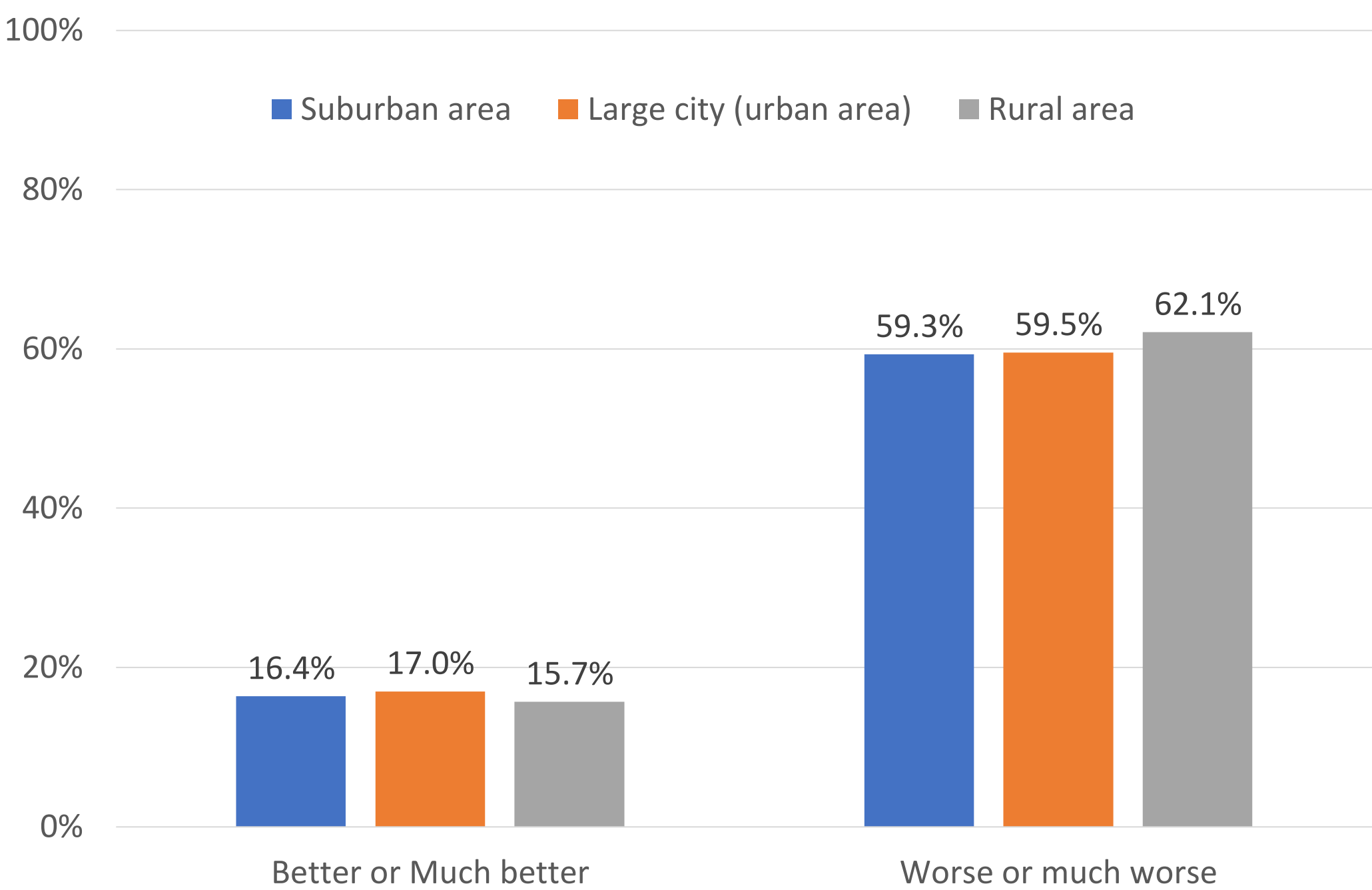


# WHO IS MORE OPTIMISTIC?

*Airline Usage*



*Residential Status*



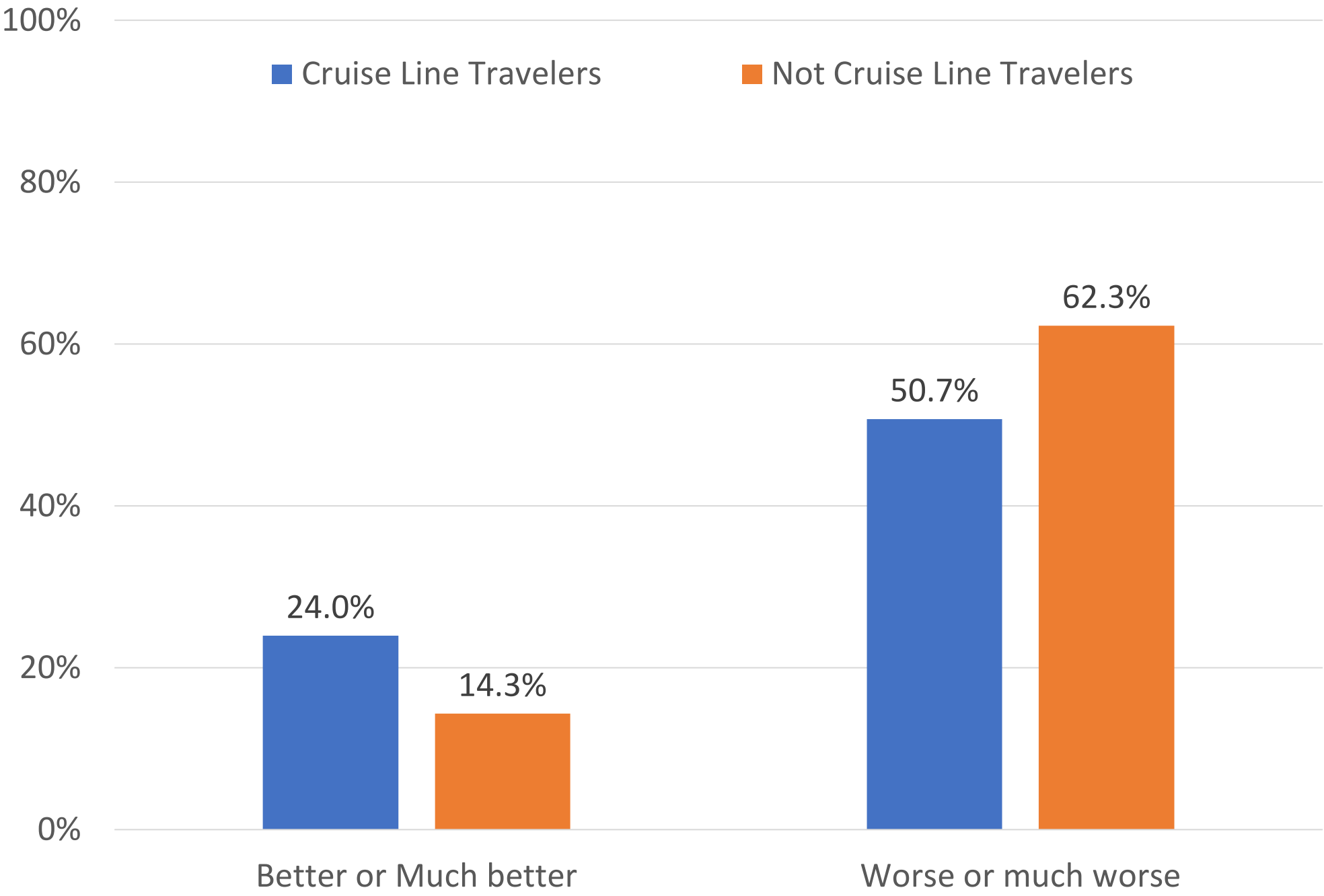
**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will \_\_\_\_\_

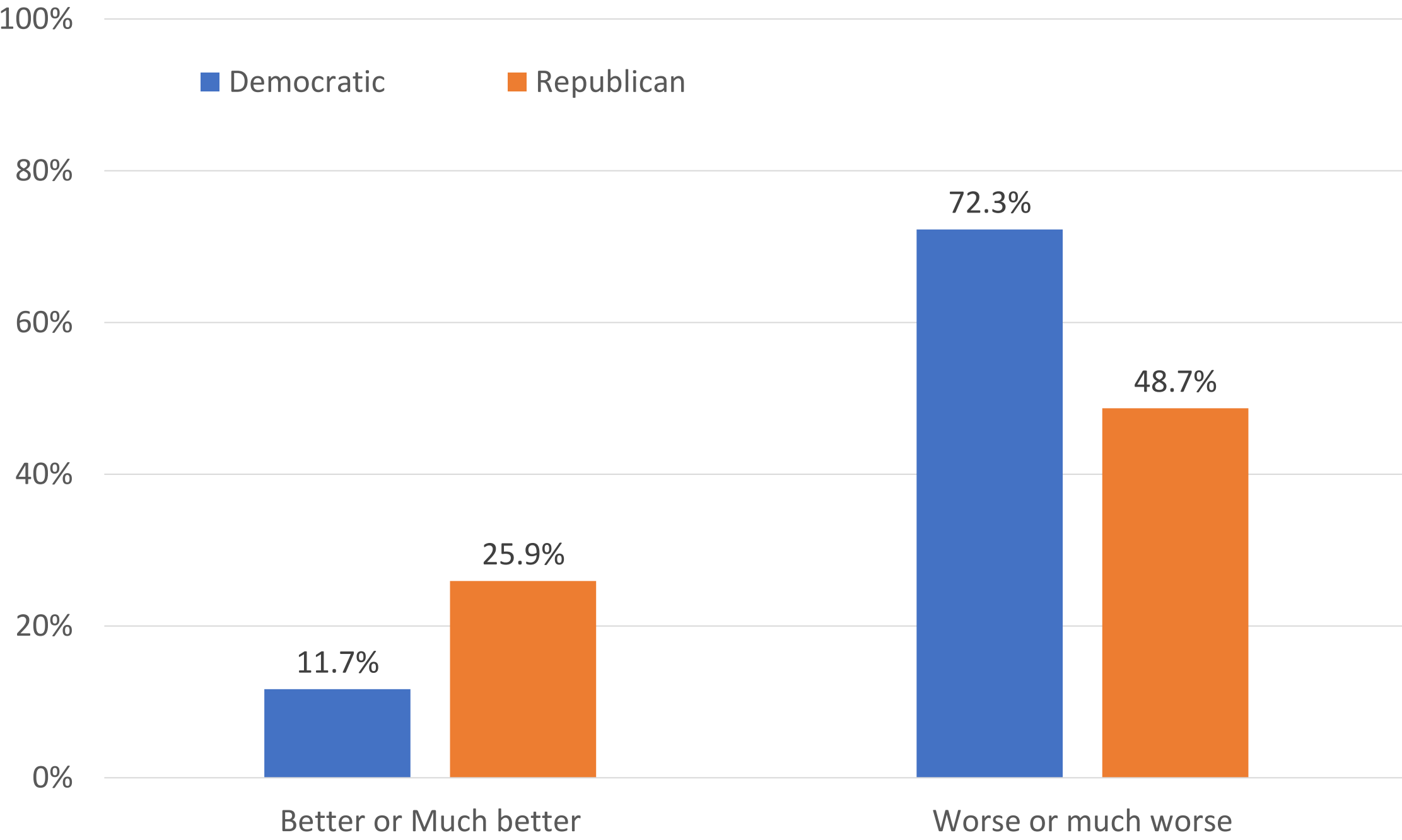


# WHO IS MORE OPTIMISTIC?

## Cruise Passengers



## Republicans



**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)

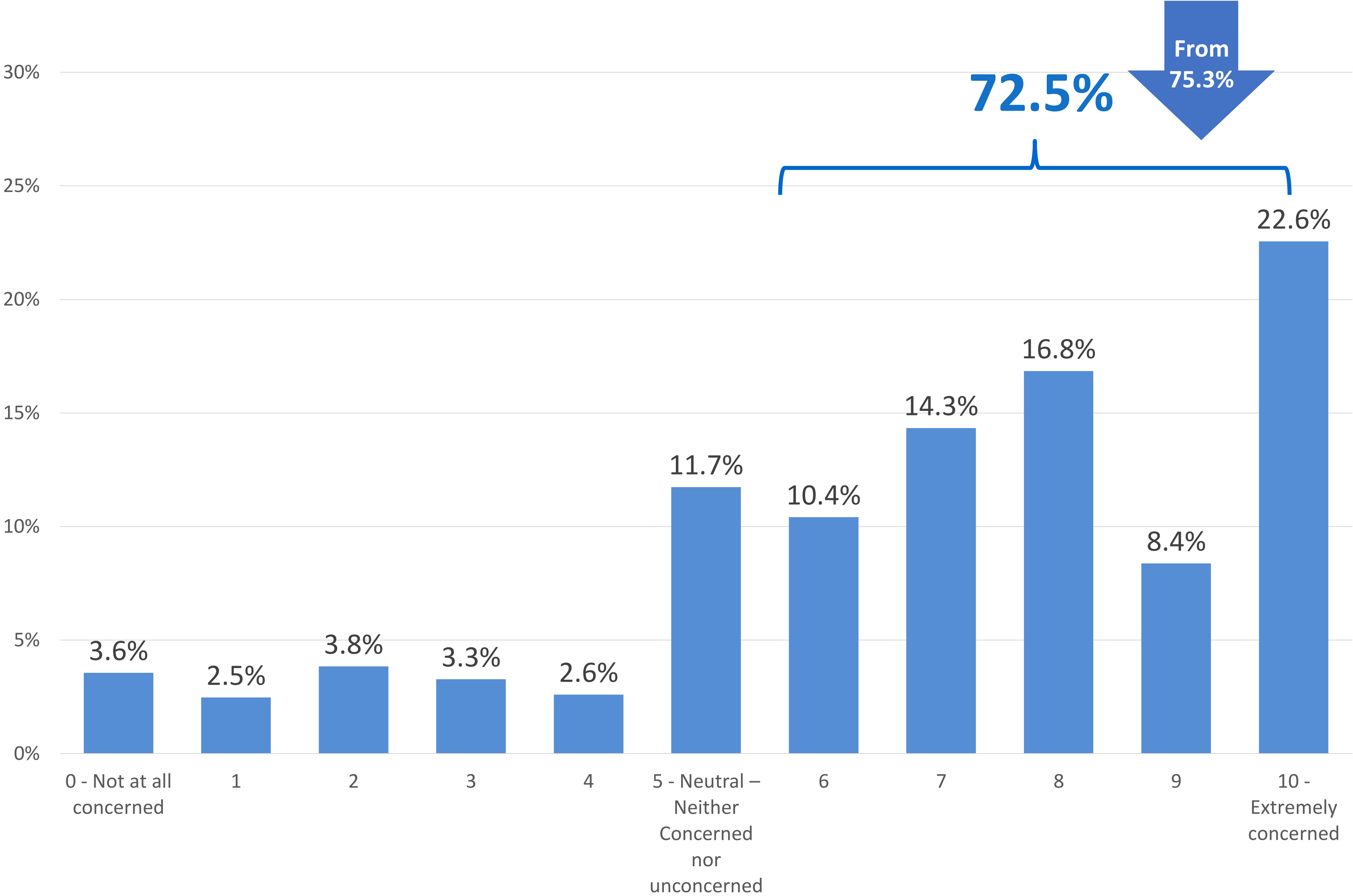
In the next month the coronavirus situation will \_\_\_\_\_



# 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 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

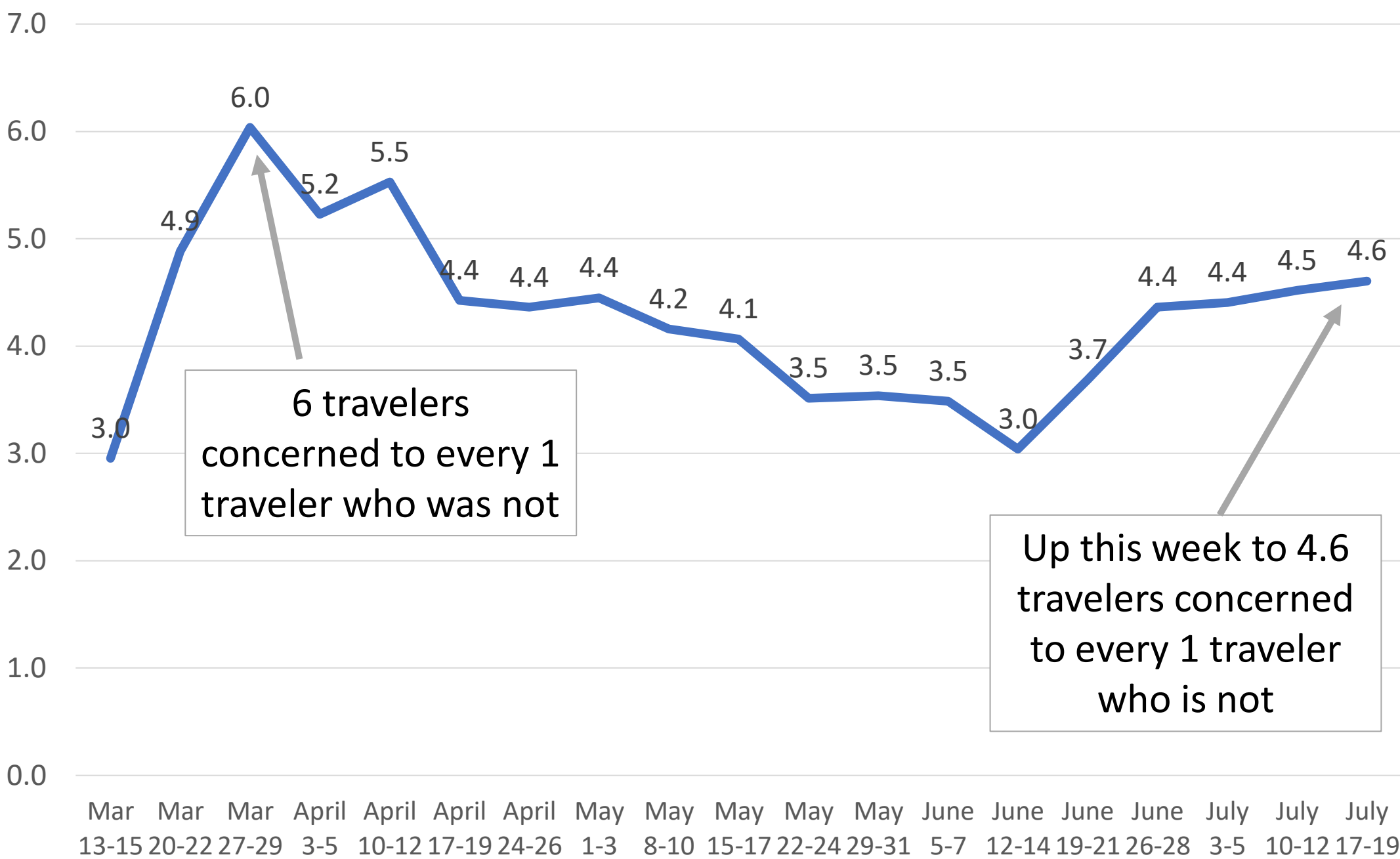
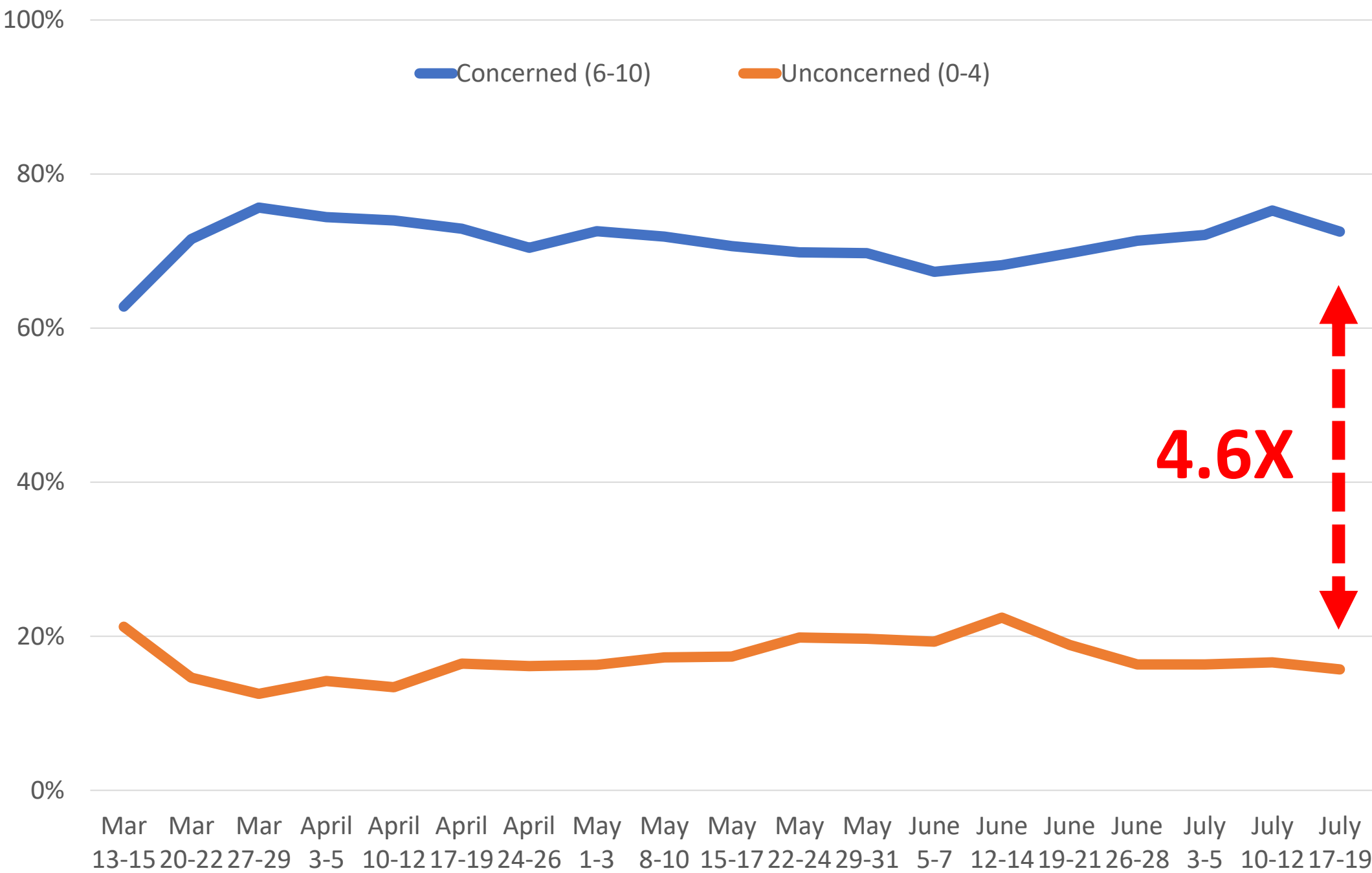




# RATIO OF CONCERNED TO UNCONCERNED TRAVELERS: PERSONAL SAFETY

## Personal Safety

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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

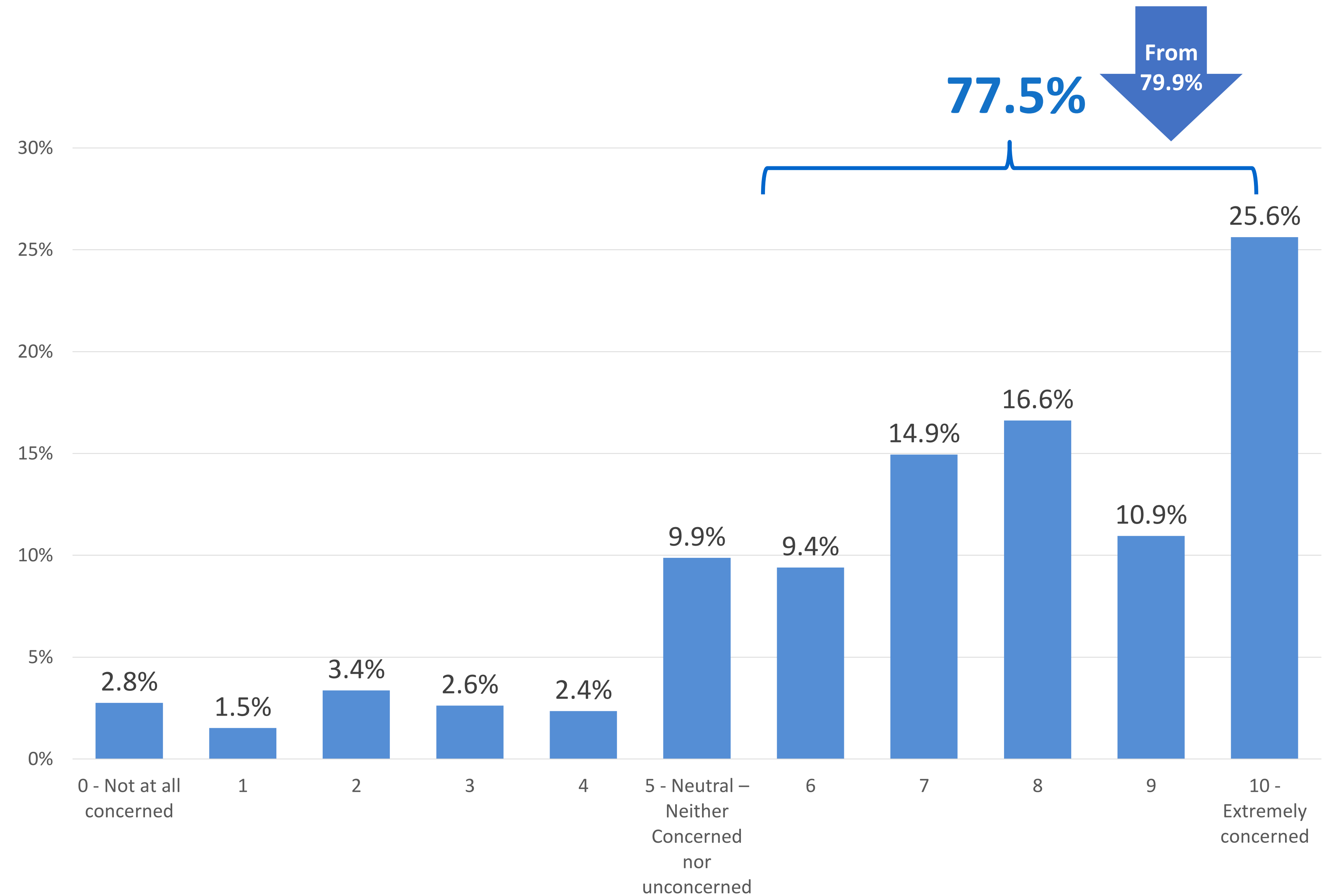
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# HEALTH CONCERNS (FAMILY & FRIENDS)

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

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

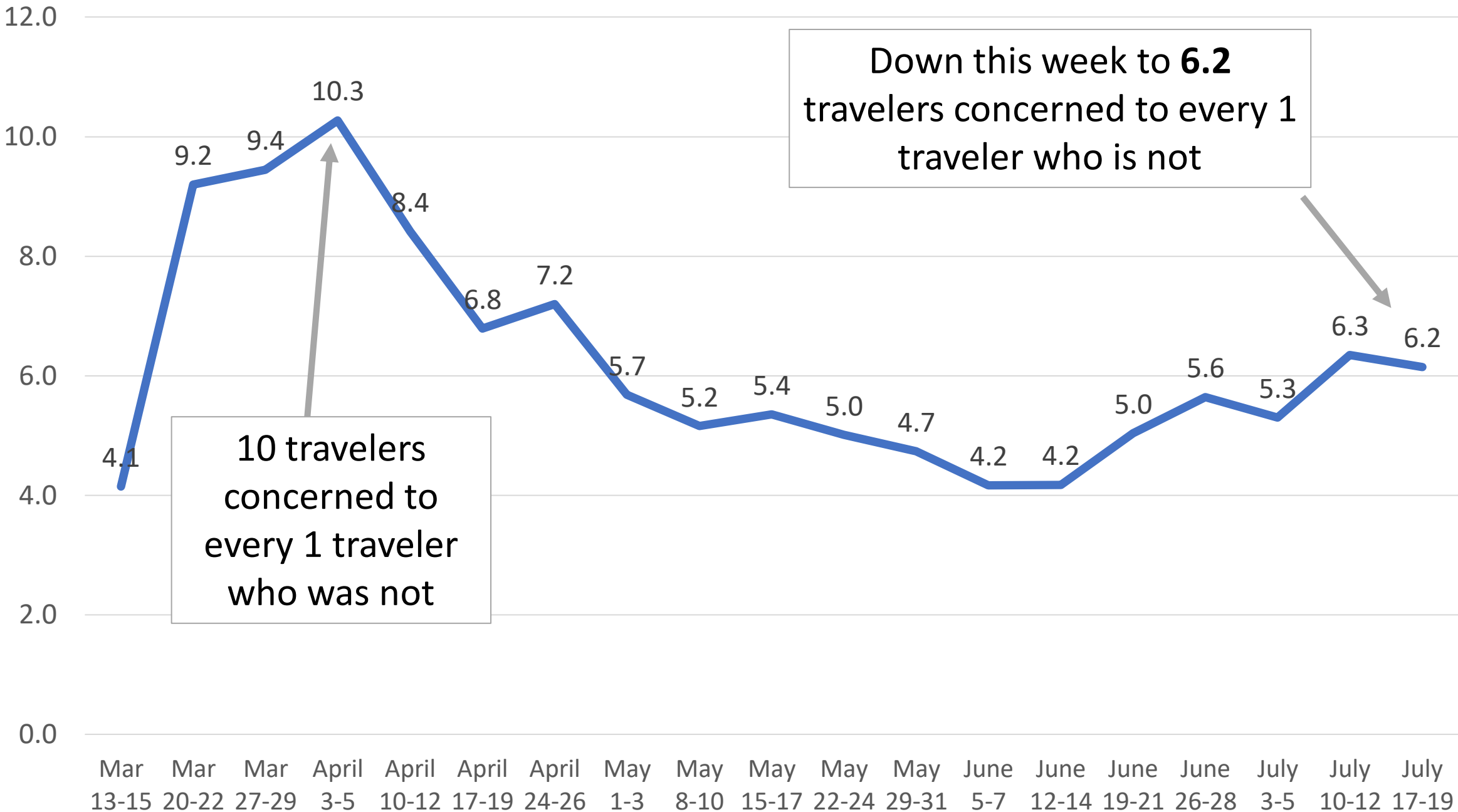
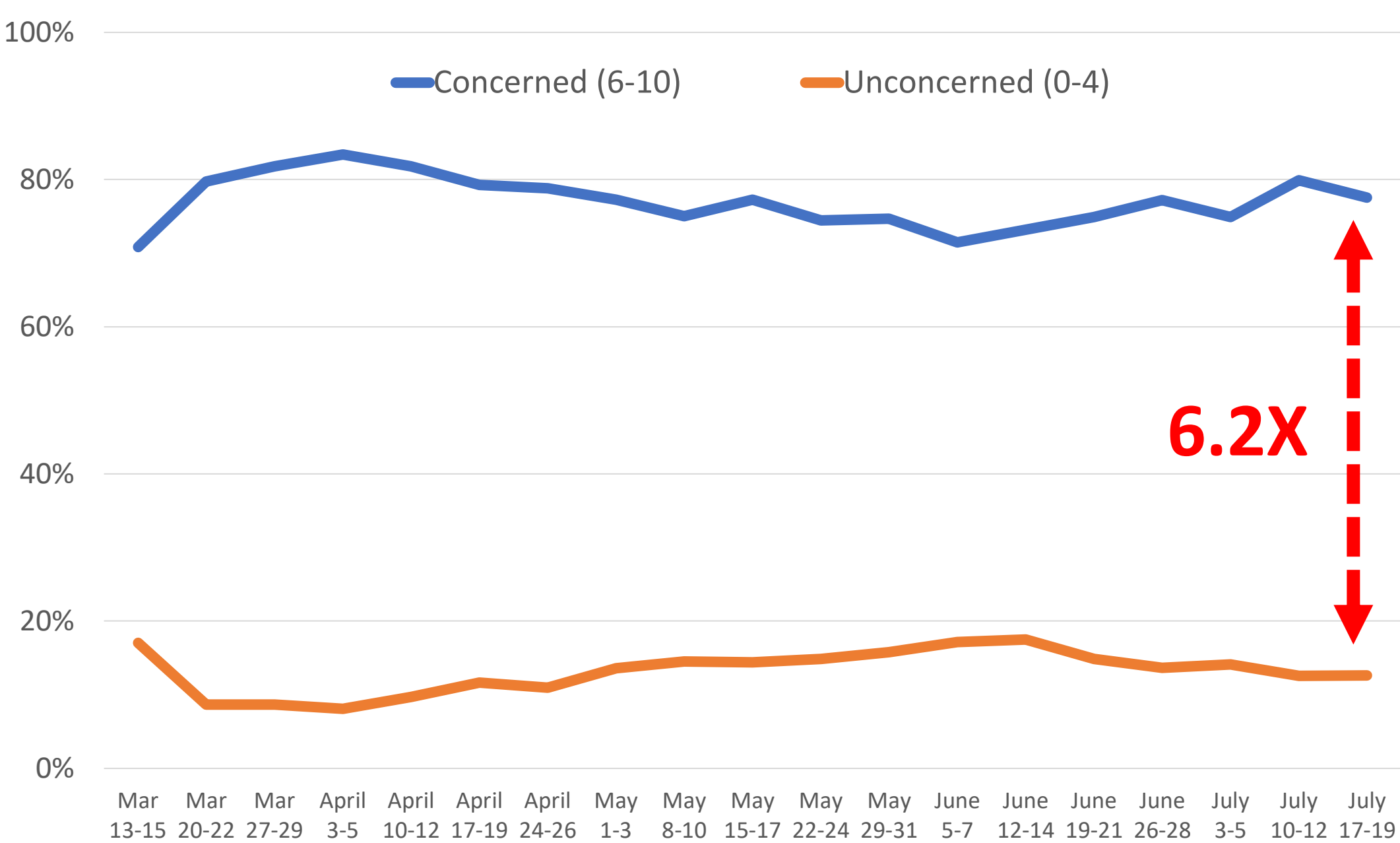




# RATIO OF CONCERNED TO UNCONCERNED TRAVELERS: FAMILY & FRIENDS SAFETY

## Safety of Friends and Relatives

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

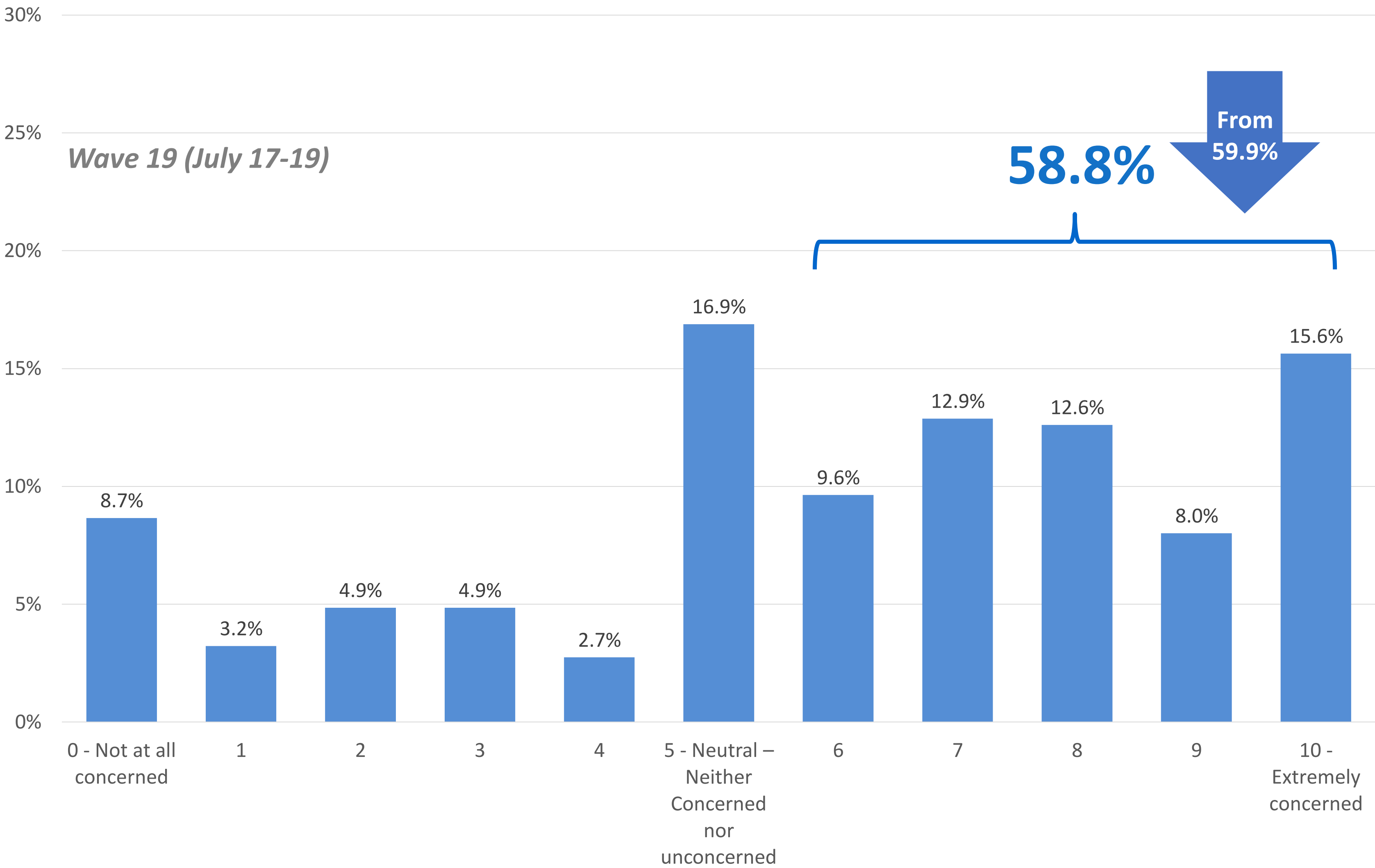


**Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

# 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 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

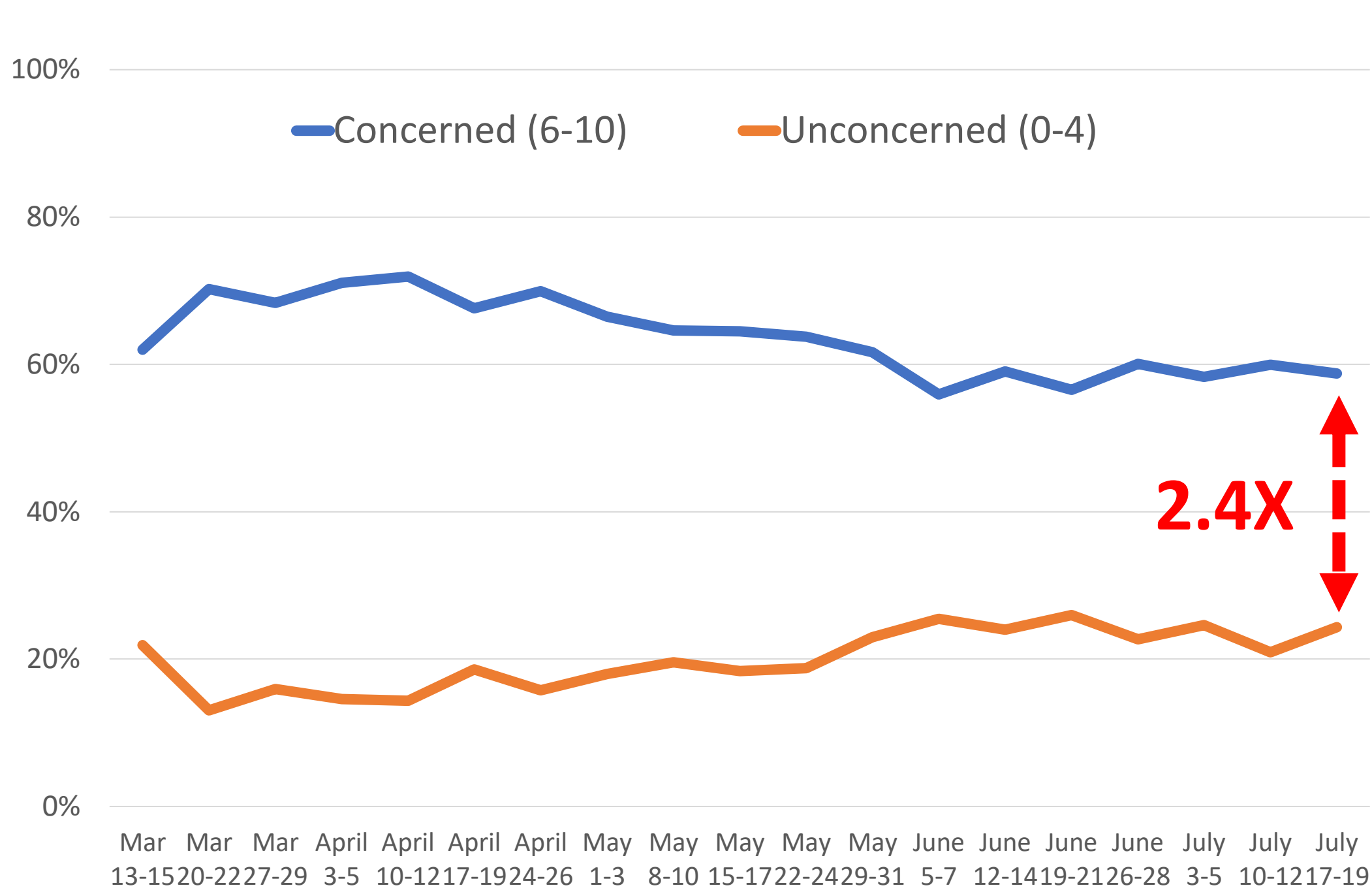




# RATIO OF CONCERNED TO UNCONCERNED TRAVELERS: PERSONAL FINANCES

## Personal Finances

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



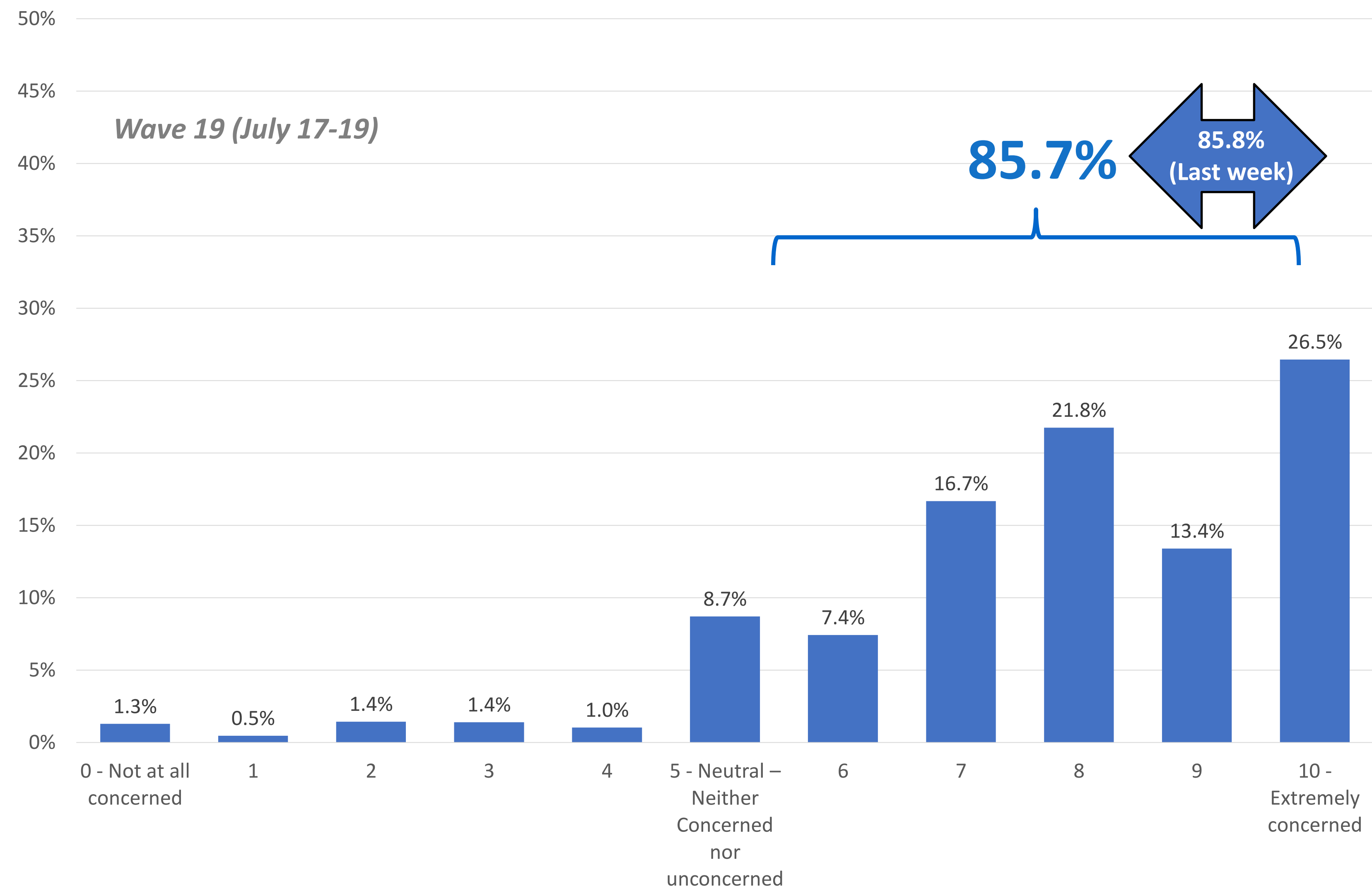
**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?  
(Please answer using the scale below)

(Base: 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 and 1,200 completed surveys.  
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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 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

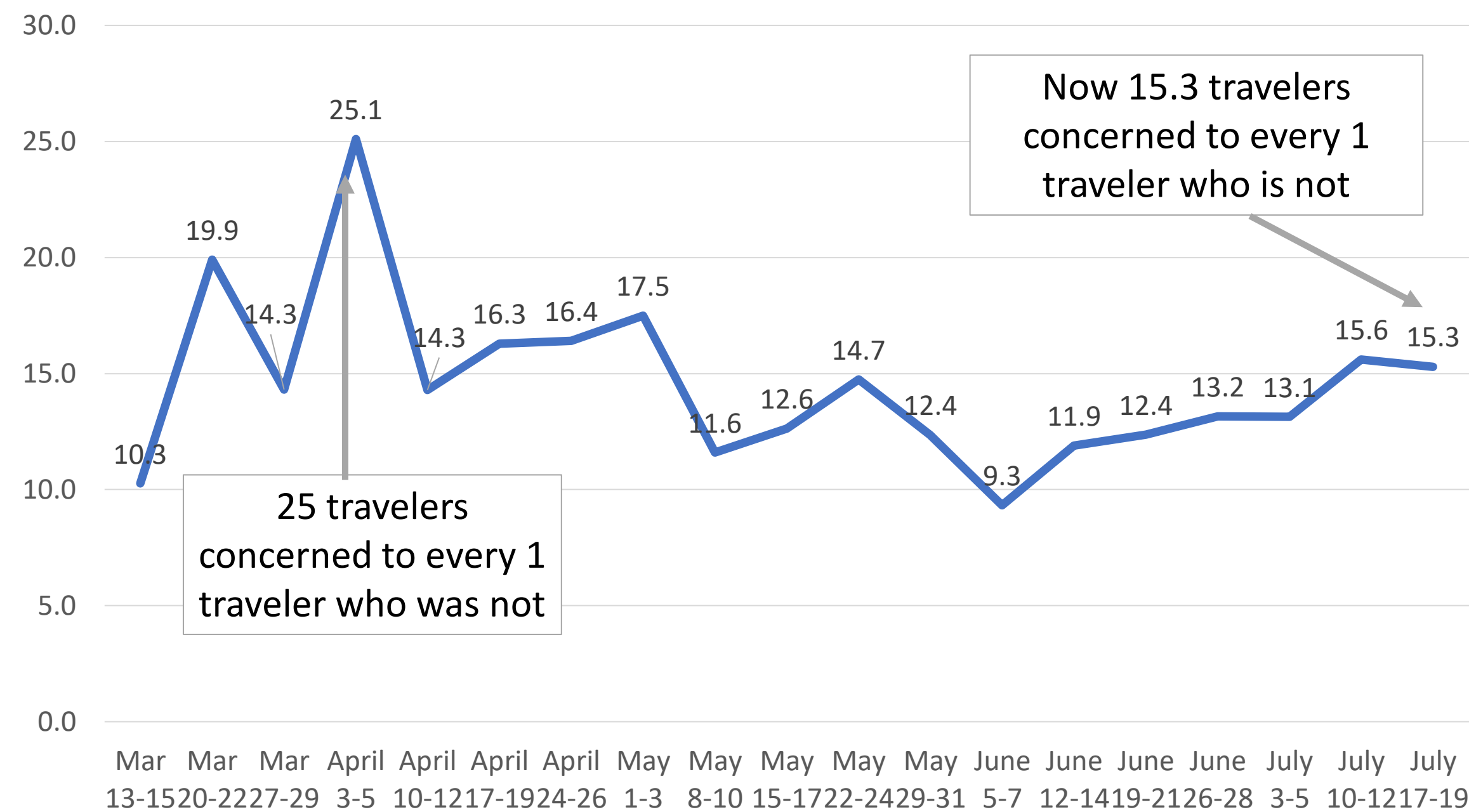
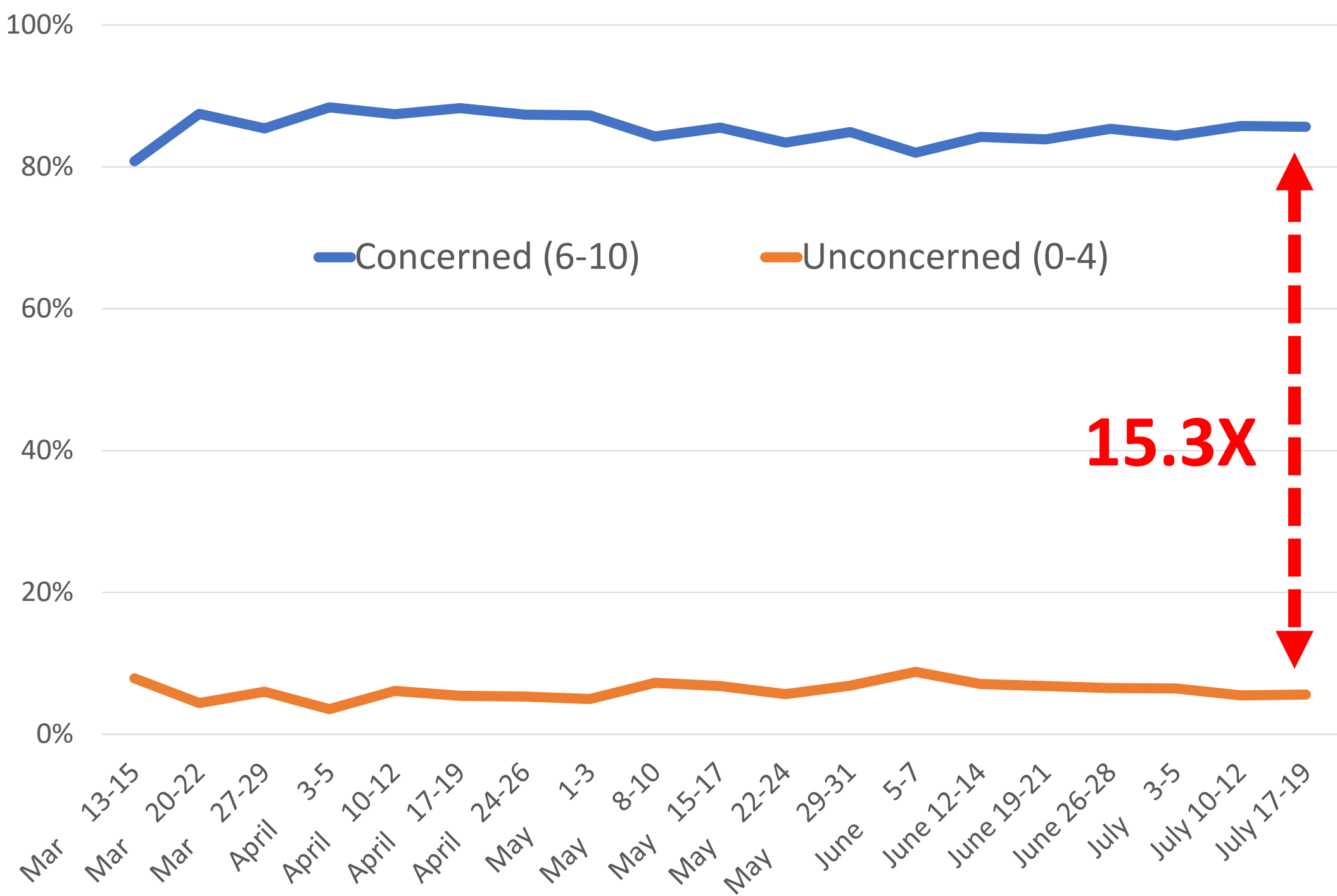




# RATIO OF CONCERNED TO UNCONCERNED TRAVELERS: NATIONAL ECONOMY

## National Economy

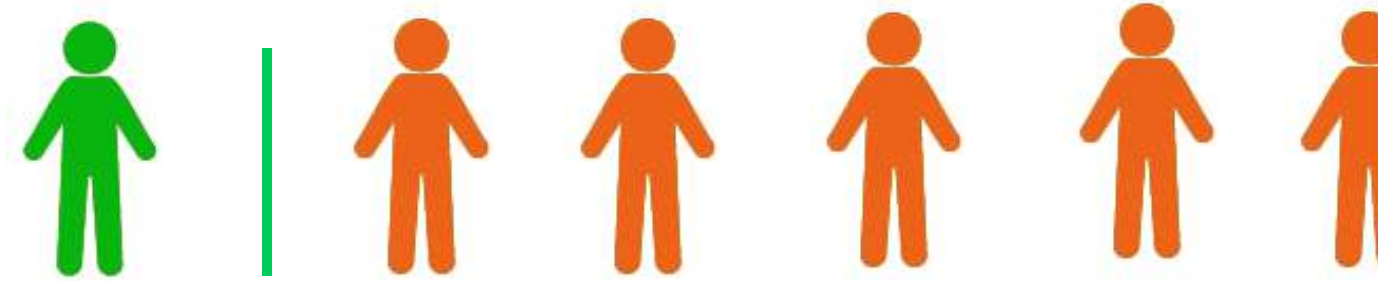
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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

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## Personal Safety



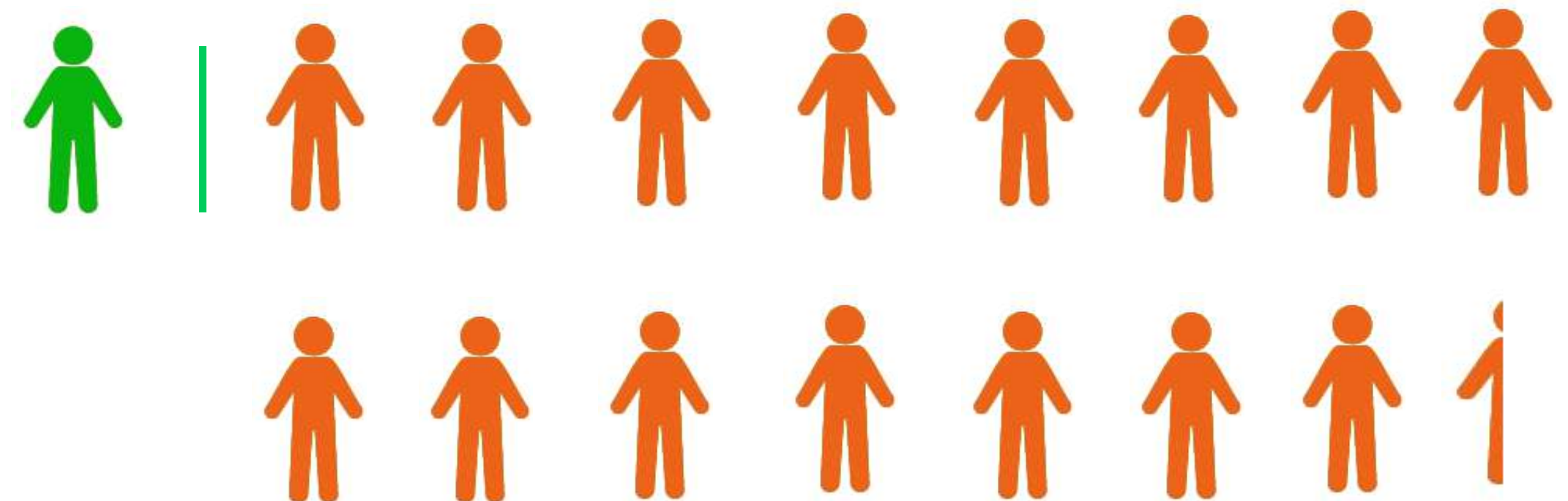
## Safety of Friends & Family



## Personal Finances



## National Economy

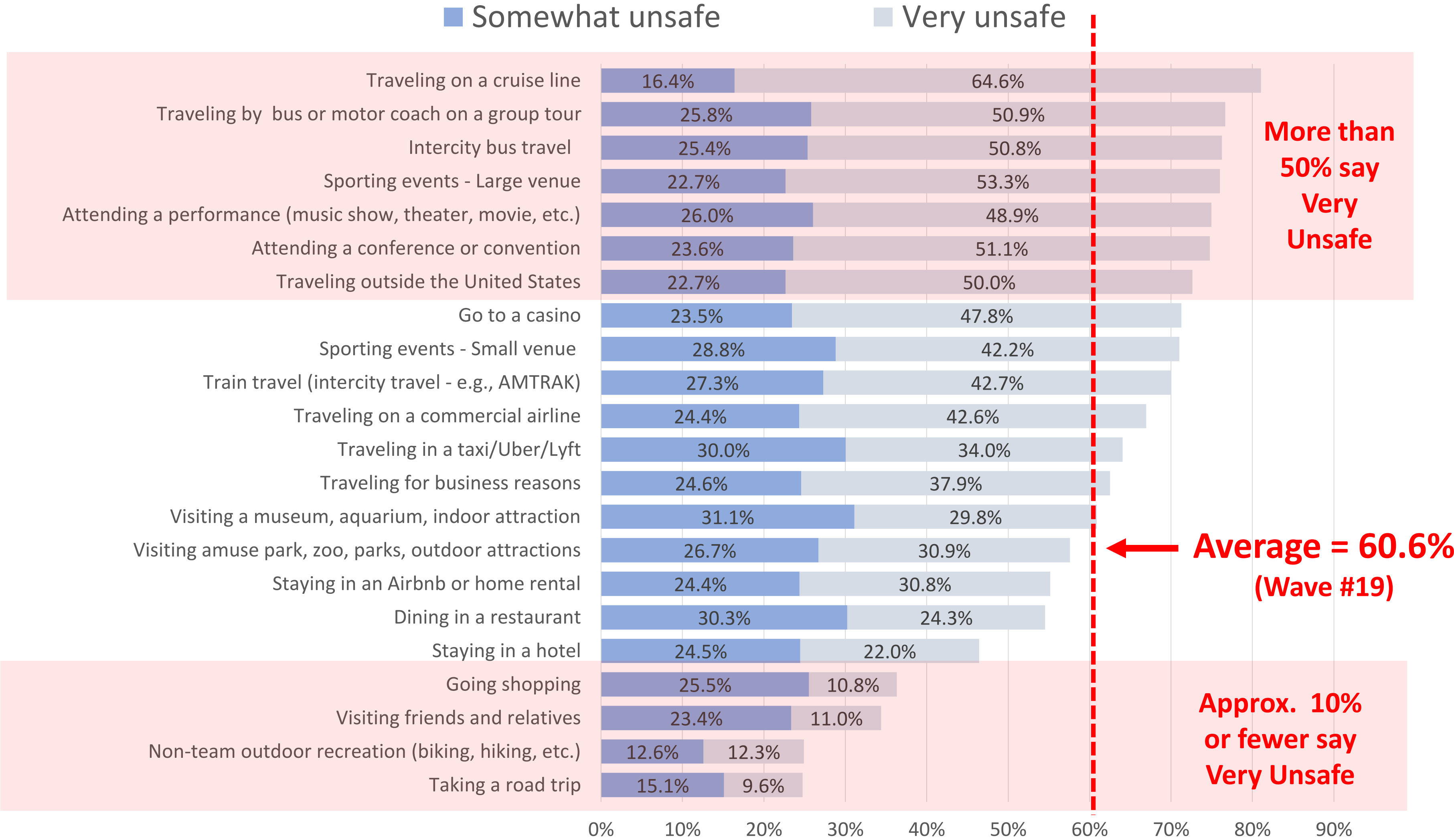




# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 19)

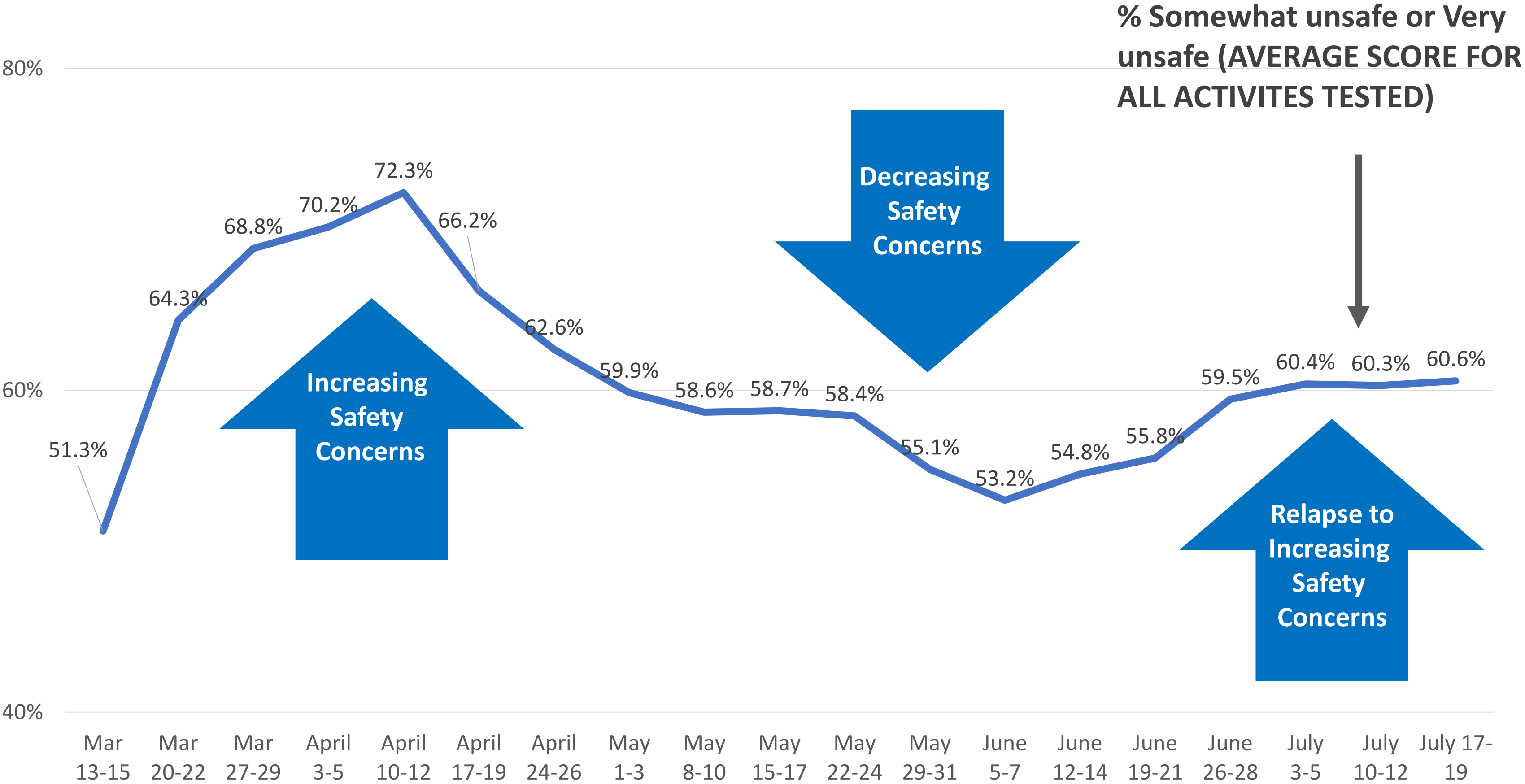
**Question:** At this moment, how safe would you feel doing each type of travel activity?

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-19 COMPARISON)

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

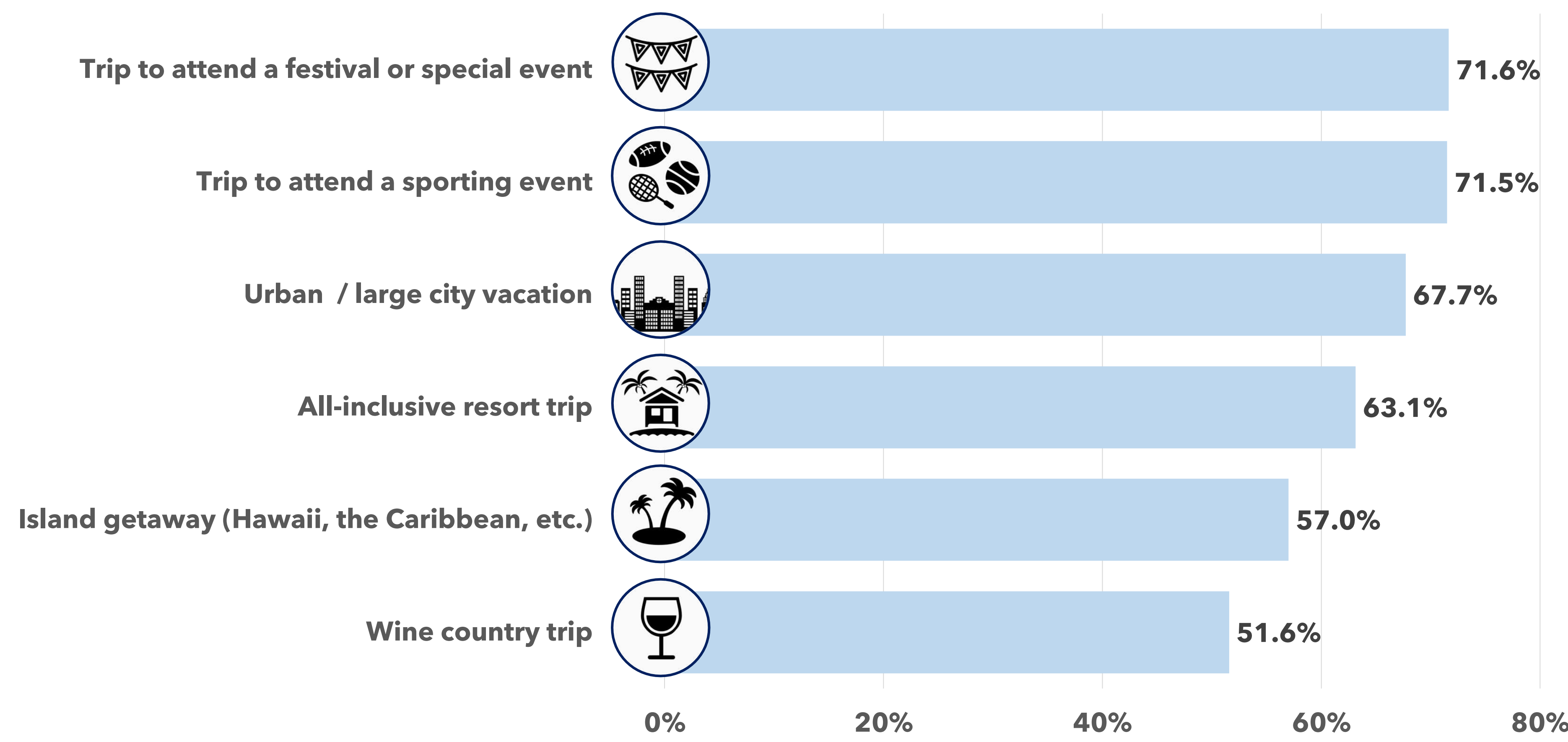


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# PERCEIVED SAFETY OF TRIP TYPES (% SOMEWHAT UNSAFE OR VERY UNSAFE)

AS OF JULY 20<sup>TH</sup>

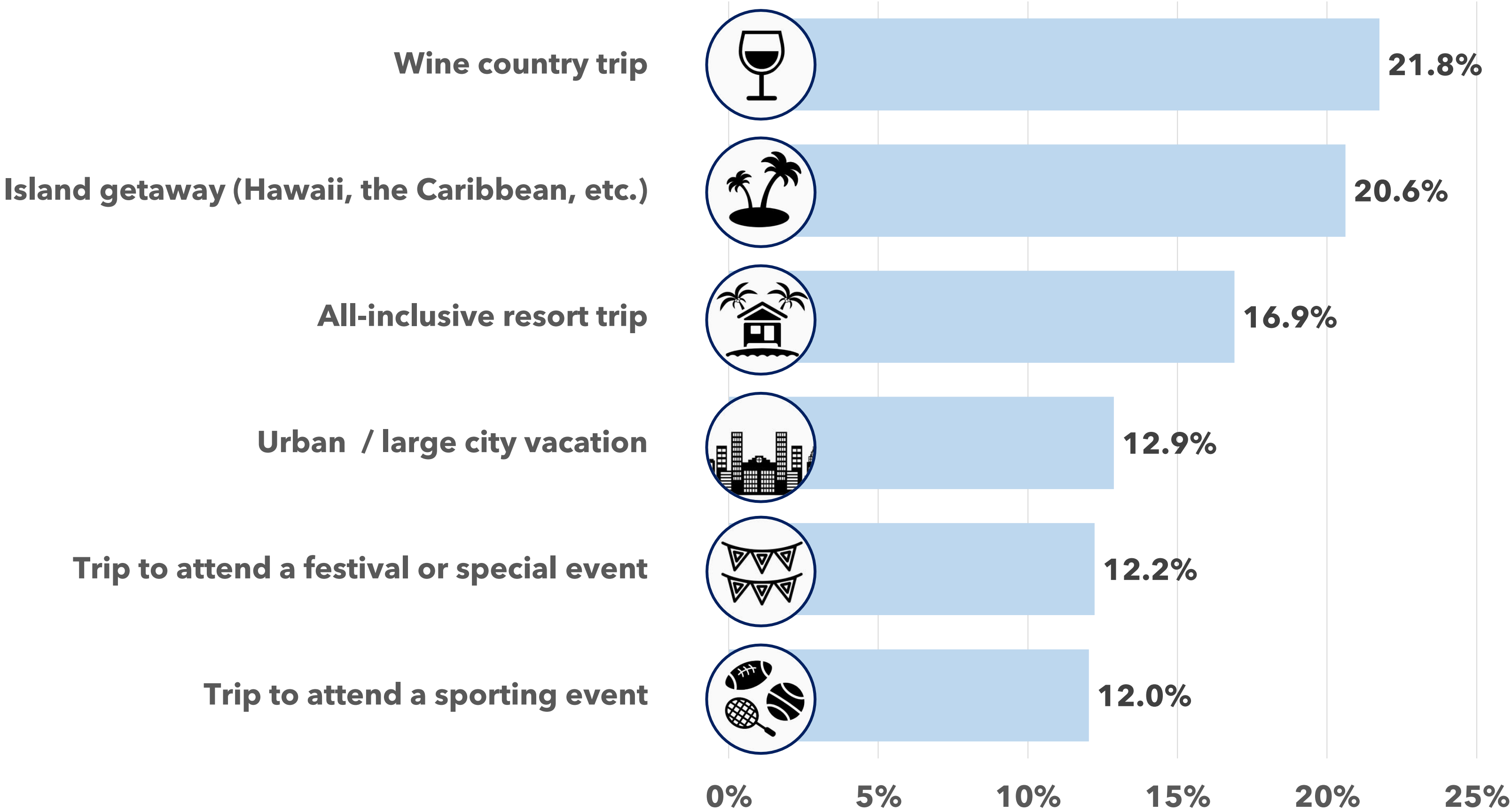


**QUESTION:** PLEASE EVALUATE THE SAFETY OF SEVERAL TYPES OF DOMESTIC LEISURE TRIPS IF TAKEN SOME TIME IN 2020.

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

# PERCEIVED SAFETY OF TRIP TYPES (% SOMEWHAT SAFE OR VERY SAFE)

AS OF JULY 20<sup>TH</sup>



**QUESTION:** PLEASE EVALUATE THE SAFETY OF SEVERAL TYPES OF DOMESTIC LEISURE TRIPS IF TAKEN SOME TIME IN 2020.

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

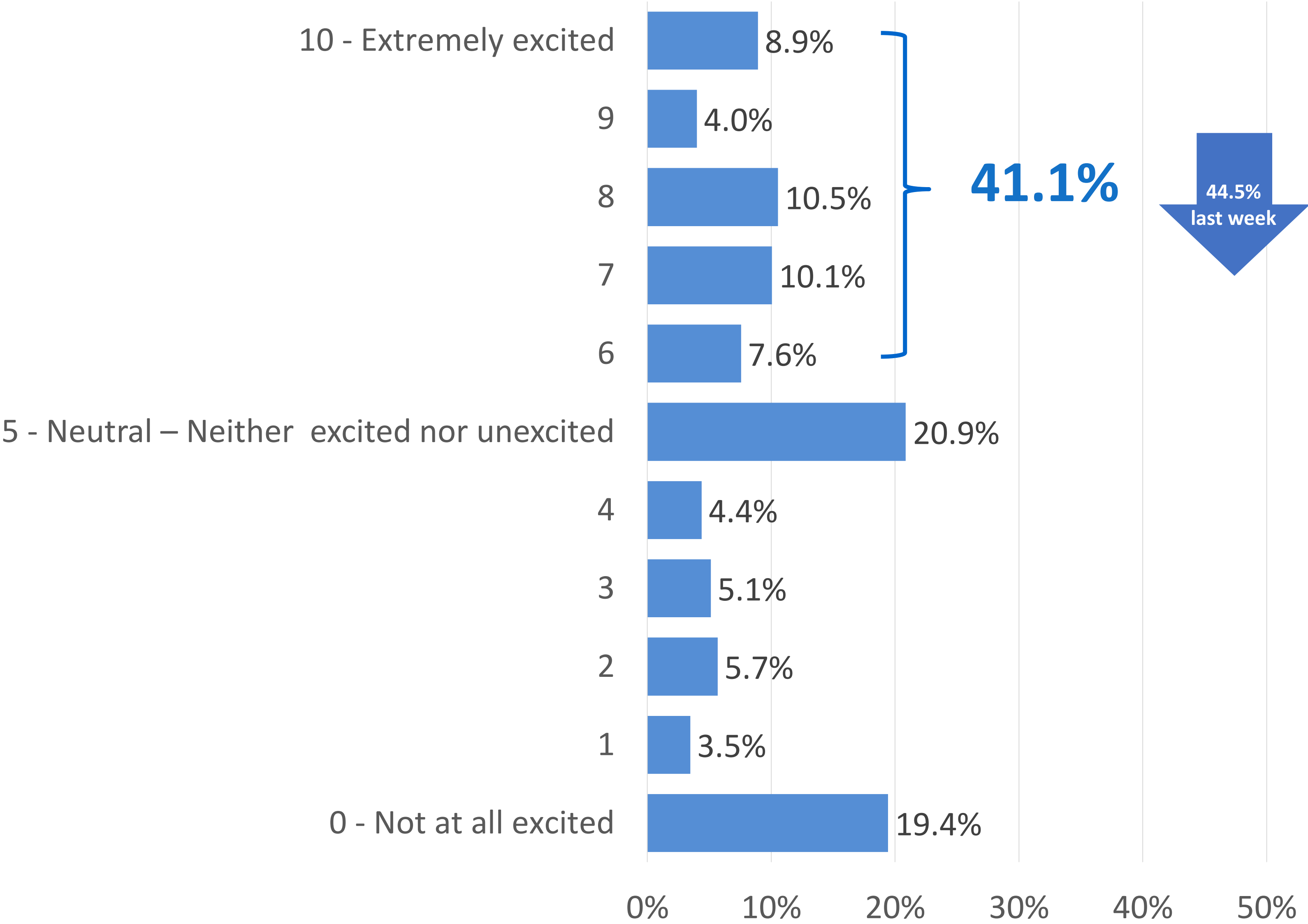


# EXCITEMENT TO TRAVEL NOW

**Question:** Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

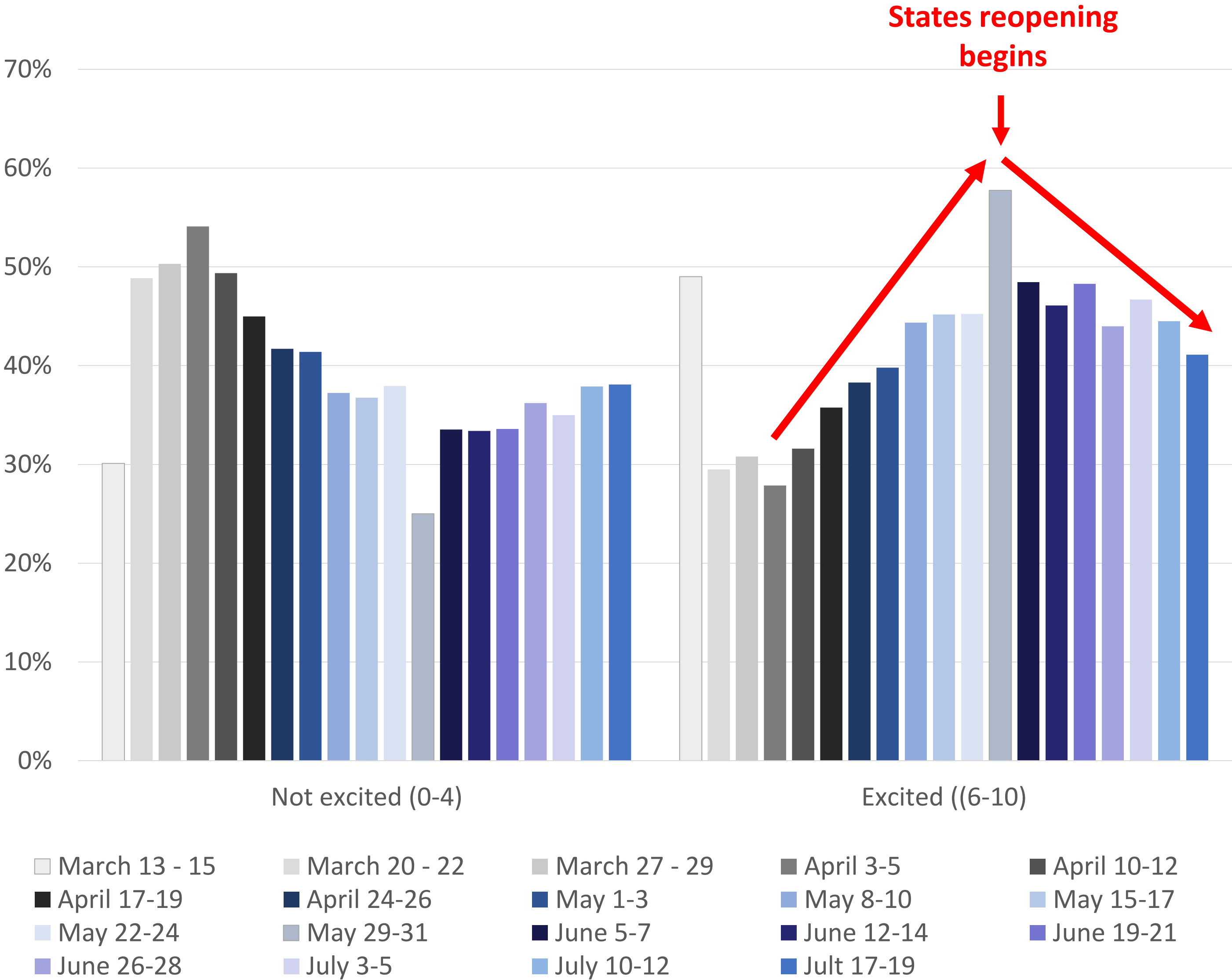


# EXCITEMENT TO TRAVEL NOW (EXCITED VS. NOT EXCITED)

**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: 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 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)*

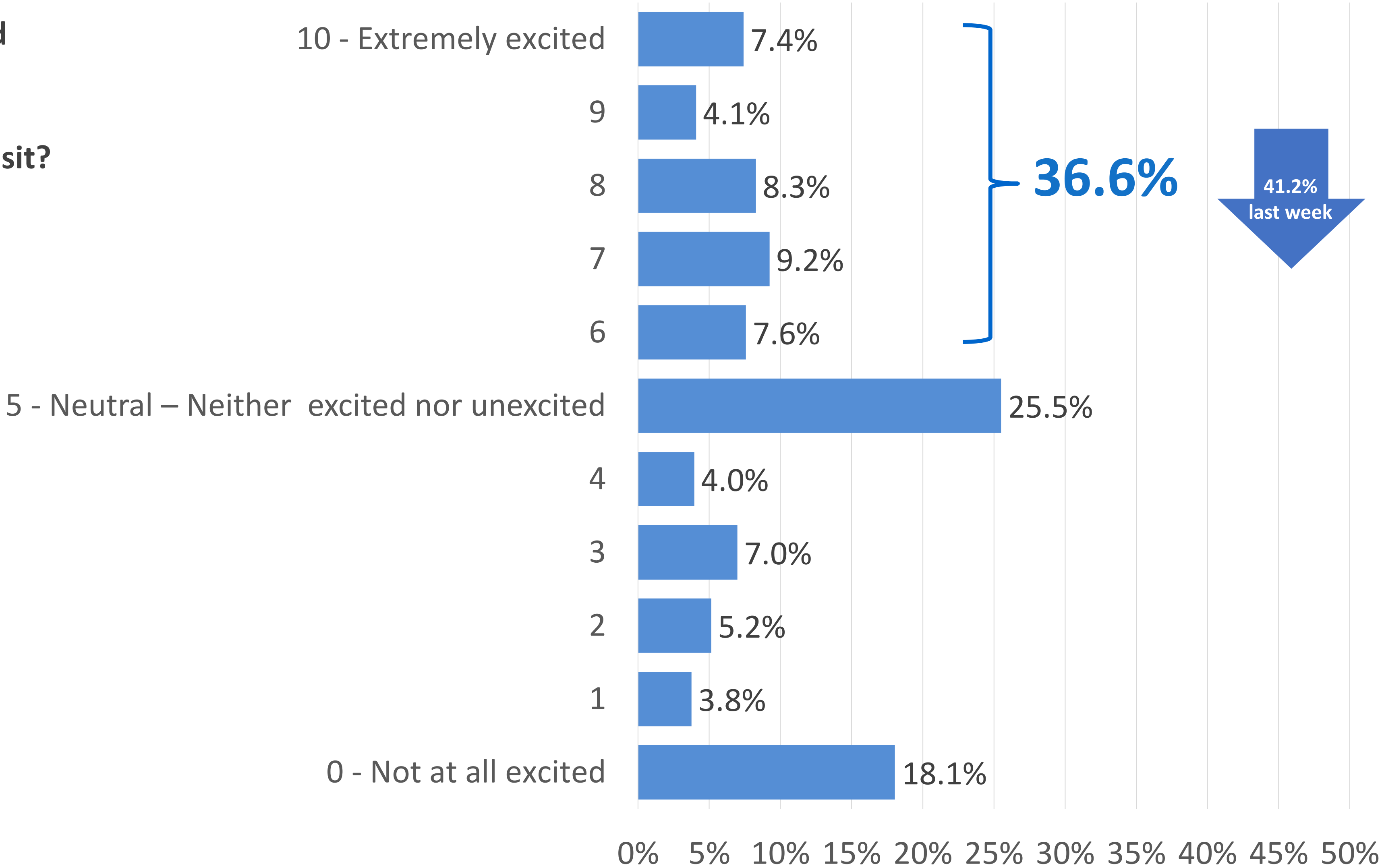




# OPENNESS TO TRAVEL INFORMATION

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

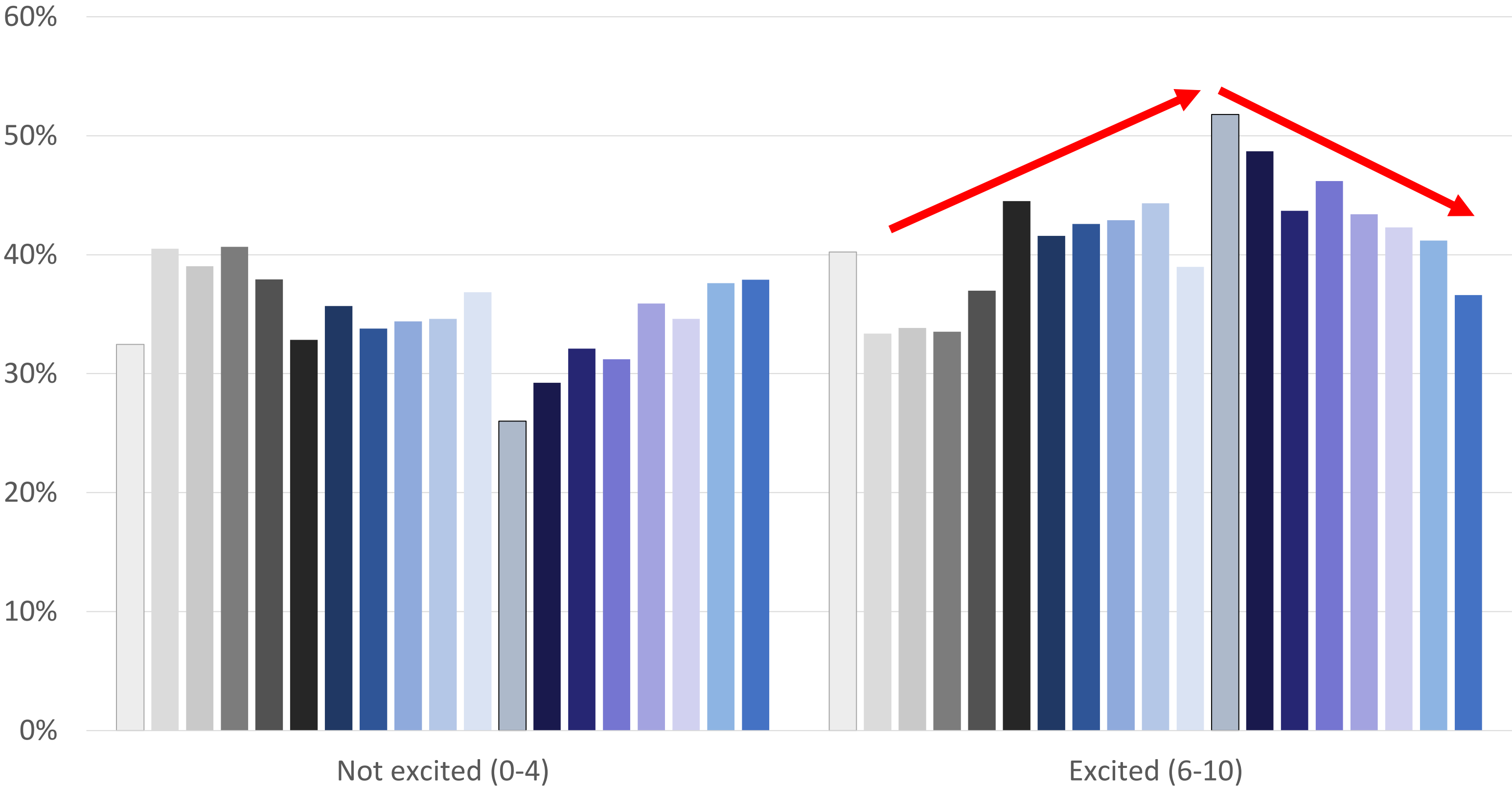
*(Base: Wave 18 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



# OPENNESS TO TRAVEL INFORMATION (EXCITED VS. NOT EXCITED)

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

(Base: 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 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)



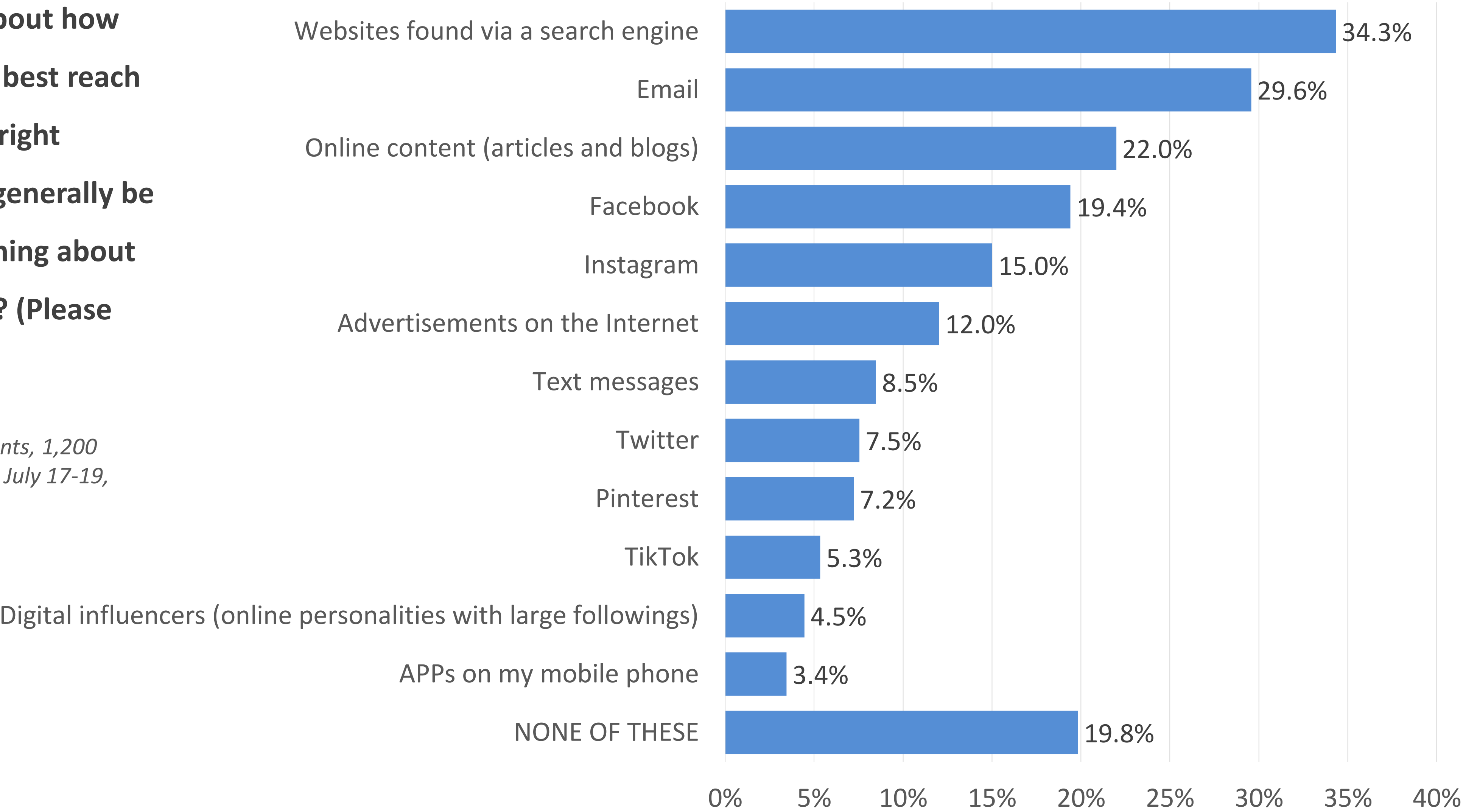
- March 13 - 15
- March 20 - 22
- March 27-29
- April 3-5
- April 10-12
- April 17-19
- April 24-26
- May 1-3
- May 8-10
- May 15-17
- May 22-24
- May 29-31
- June 5-7
- June 12-14
- June 19-21
- June 26-28
- July 3-5
- July 10-12
- July 17-19



# BEST CHANNELS TO REACH TRAVELERS

**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)

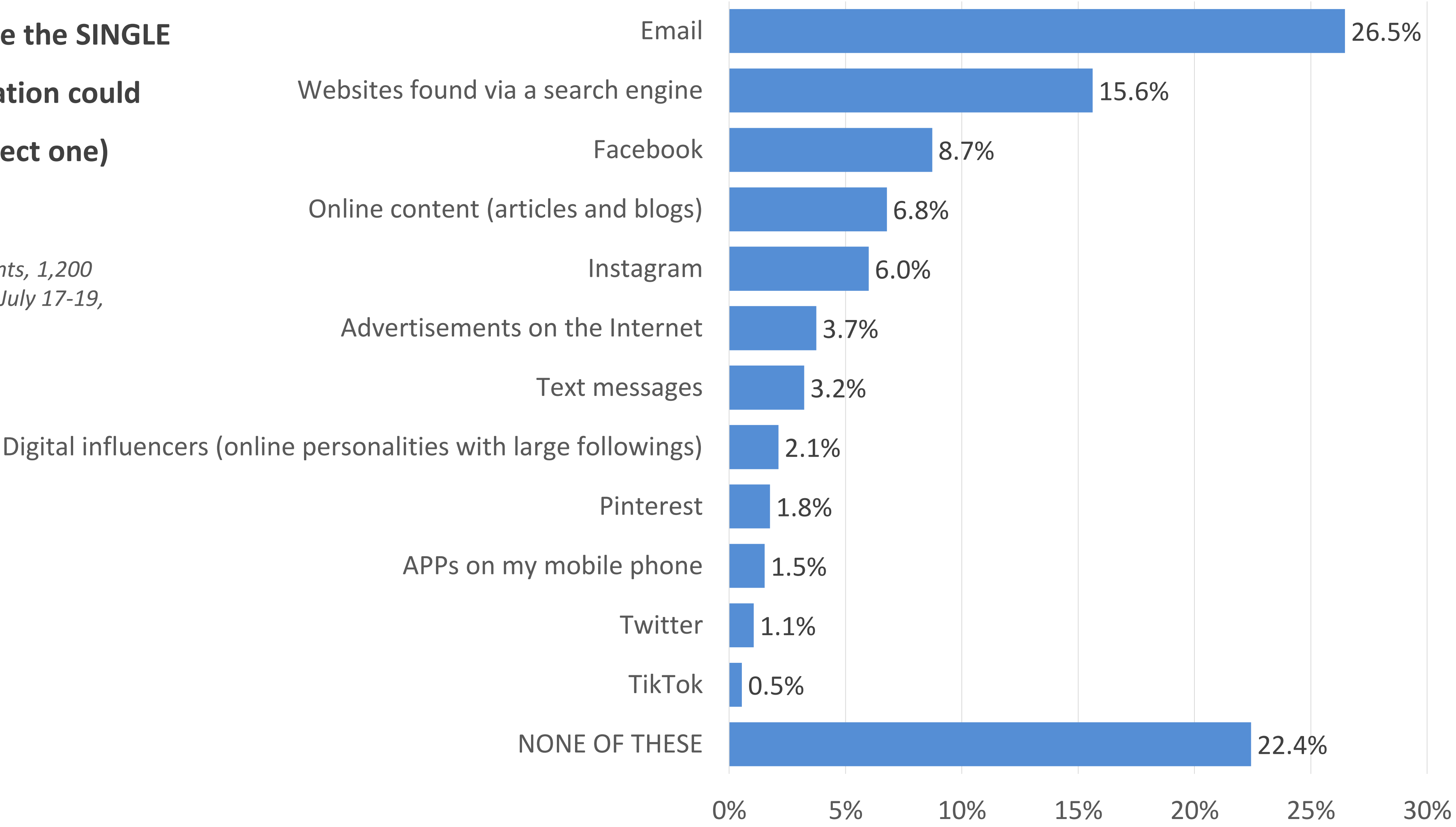
*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



# SINGLE BEST CHANNEL TO REACH TRAVELERS

**Question:** Which would be the SINGLE BEST WAY a travel destination could reach you right now? (Select one)

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*





# TRAVELERS & MASKS



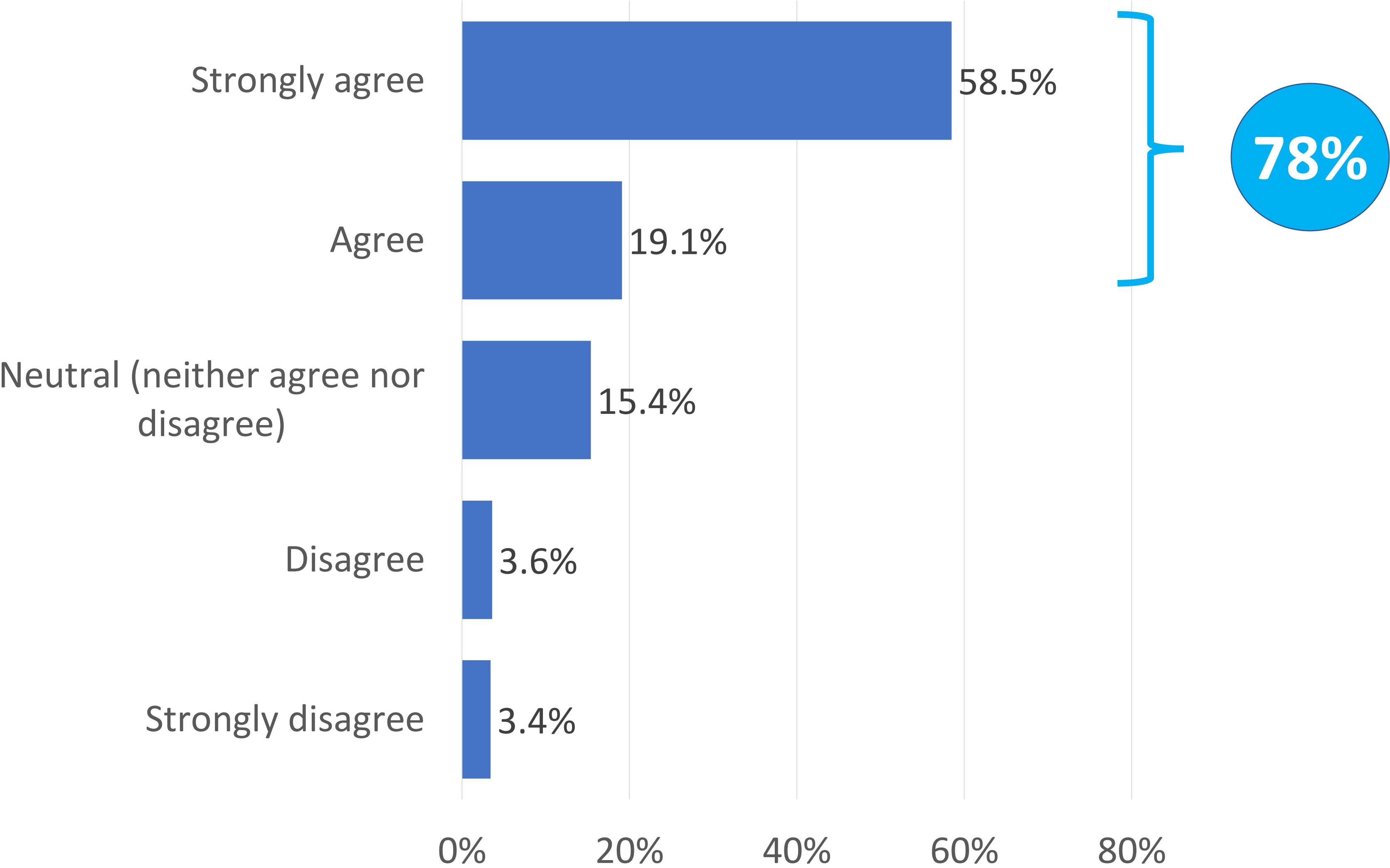


# SHOULD PEOPLE WEAR FACE MASKS IN PUBLIC

**Question:** In this environment, people should wear face masks when they are in public.

**(Agreement scale)**

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



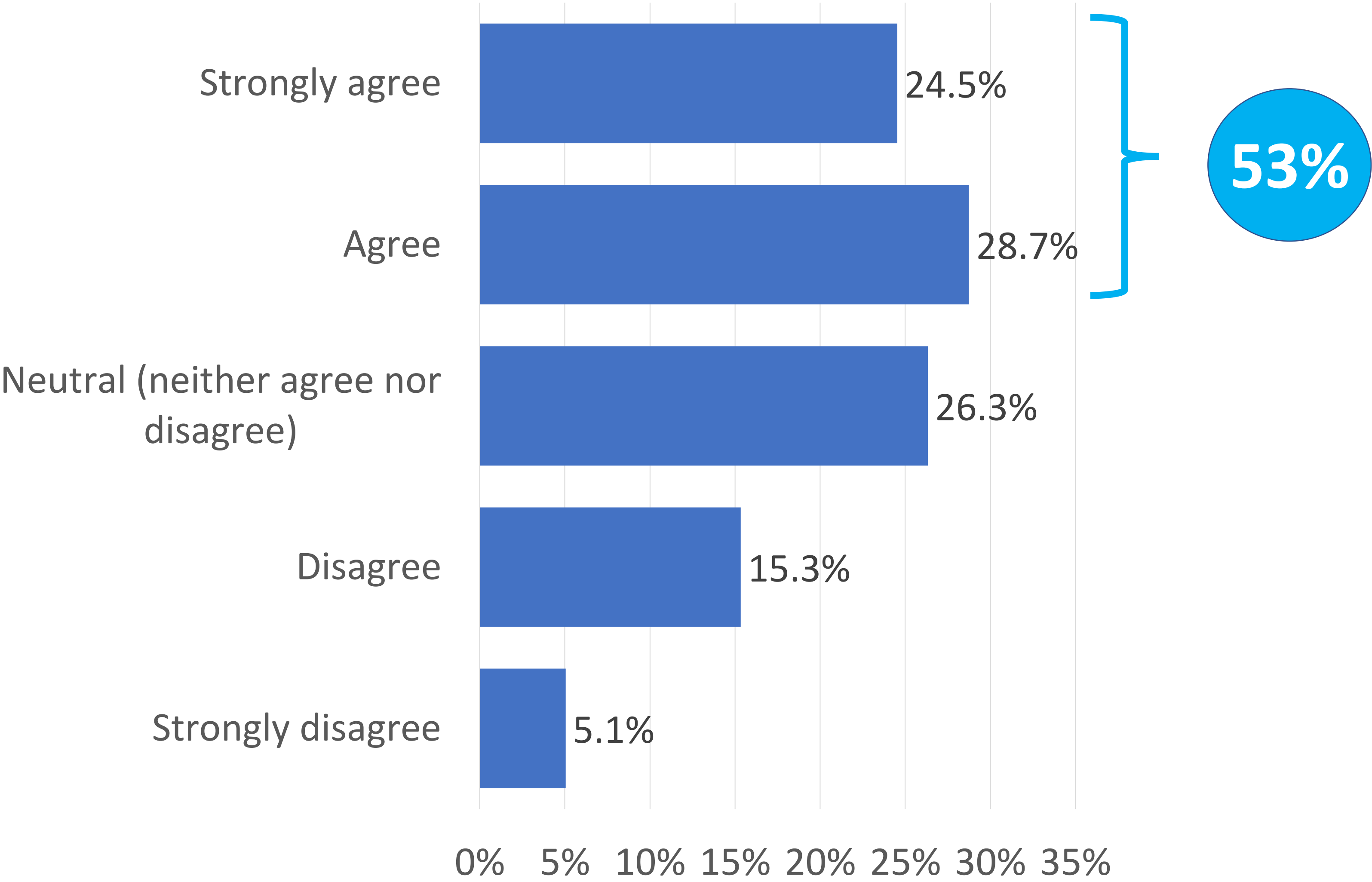


# WEARING MASKS IN THE COMMUNITY

**Question:** In my community, too many people are not wearing face masks in public.

(Agreement scale)

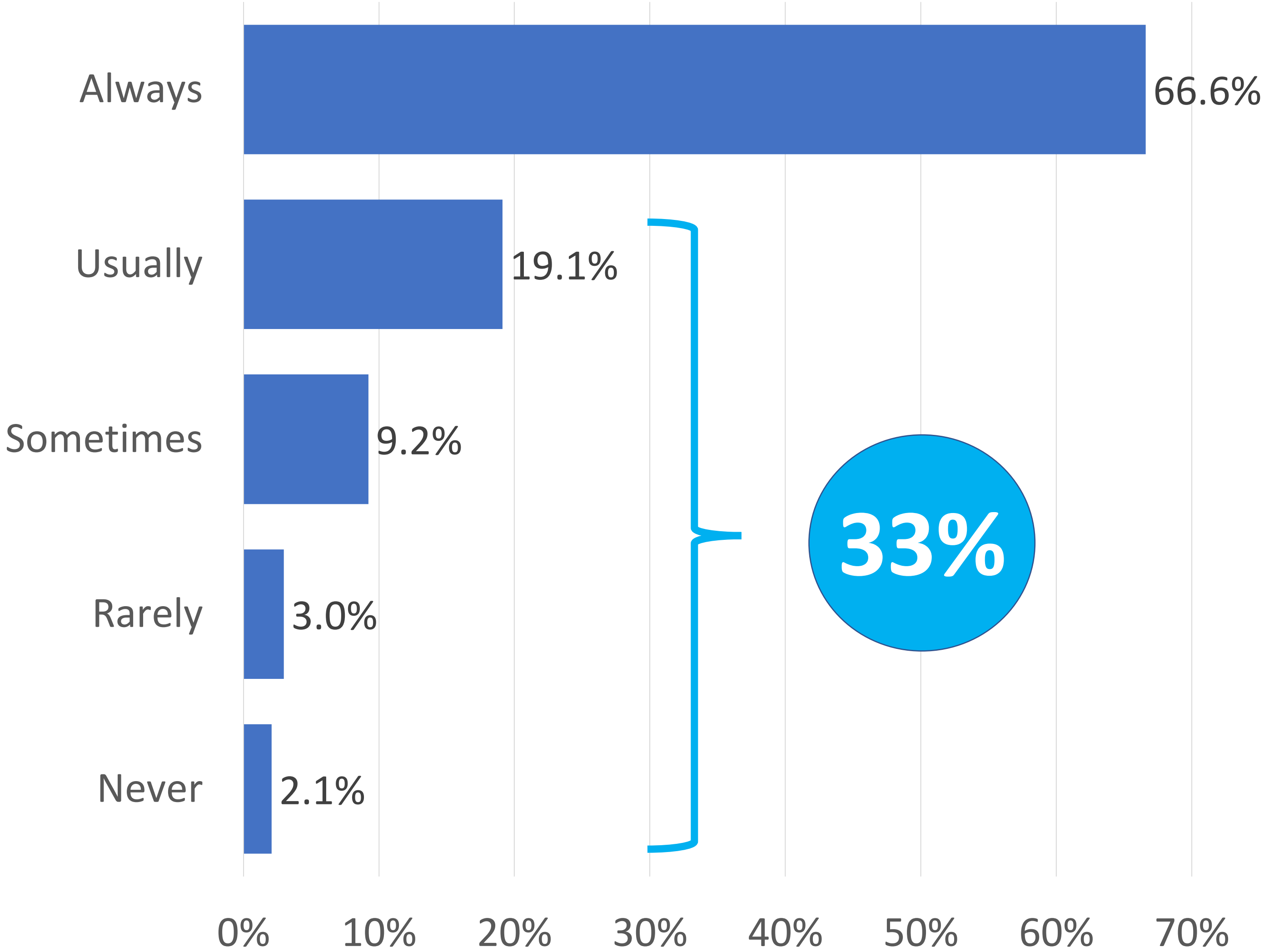
(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)



# FREQUENCY OF MASK USAGE

**Question:** How often do you personally wear a mask when going out in public?

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

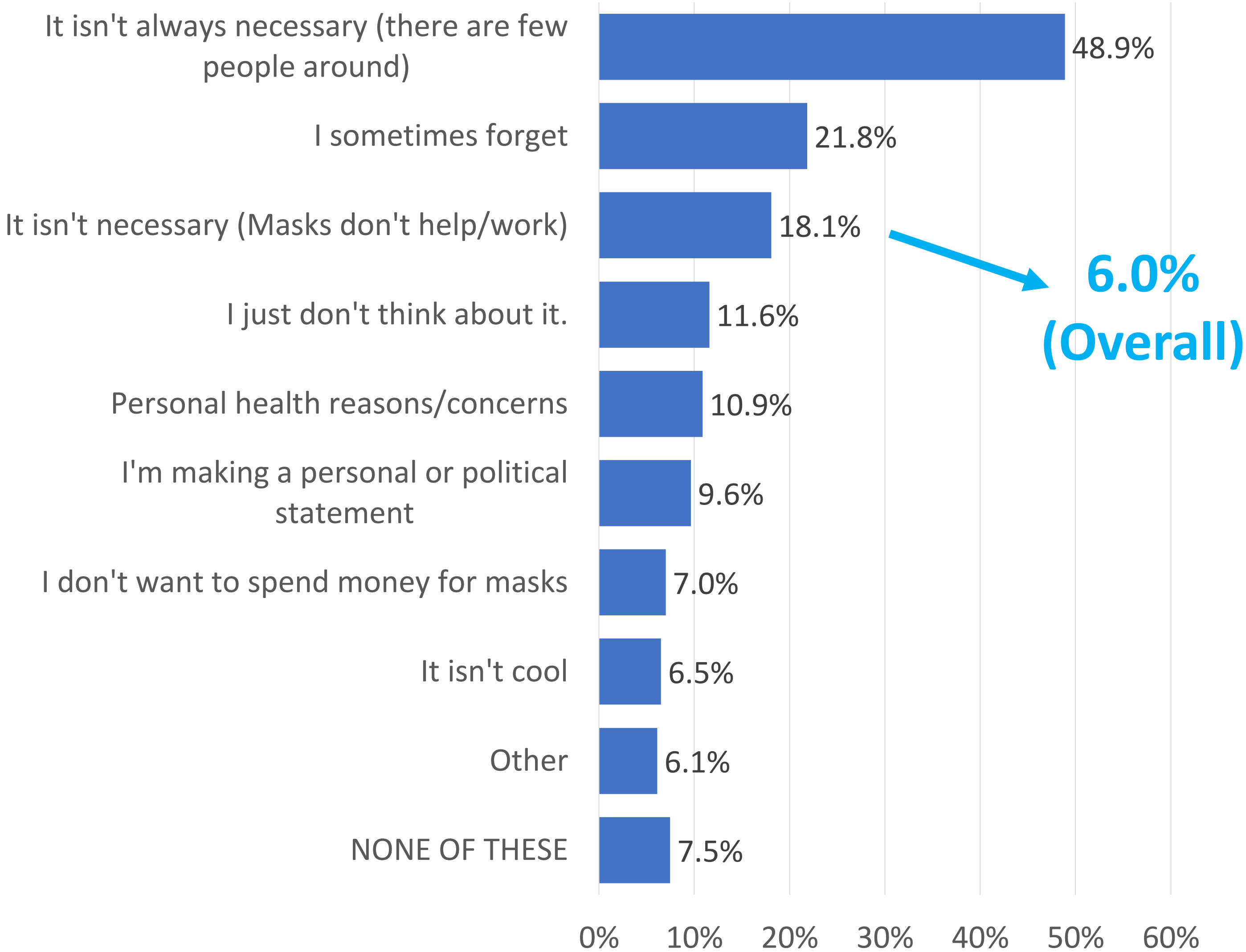




# REASONS FOR NOT WEARING MASKS

**Question:** Which of the following are reasons you don't always wear a face mask when going out in public?  
(Select all that apply)

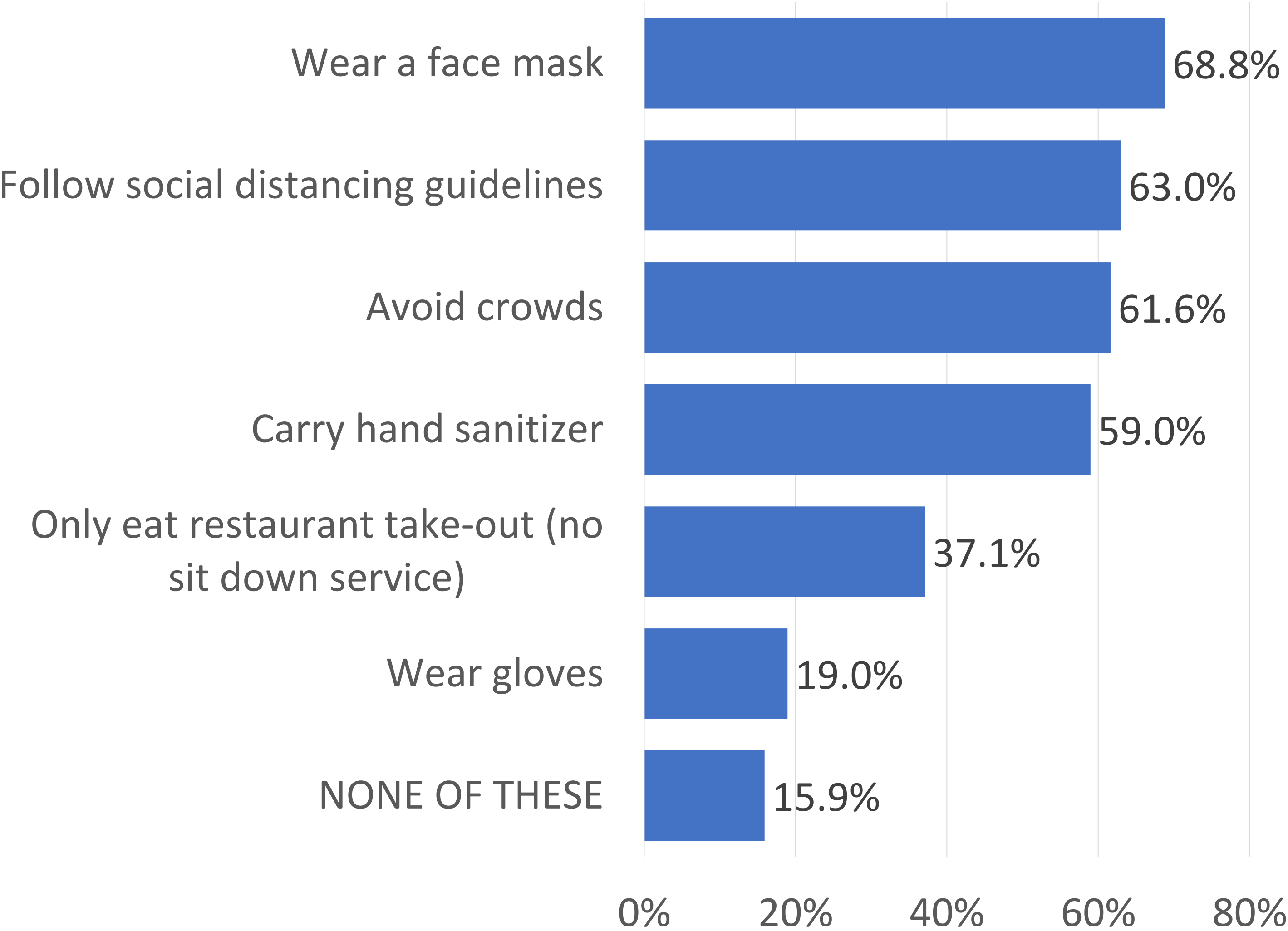
*(Base: Wave 19 data. Respondents who don't always wear masks in public, 369 completed surveys. Data collected July 17-19, 2020)*



# SAFETY PROTOCOLS WHILE TRAVELING

**Question:** If you were to take a trip in the next six months, which would you be likely to do? (Select all that apply)

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

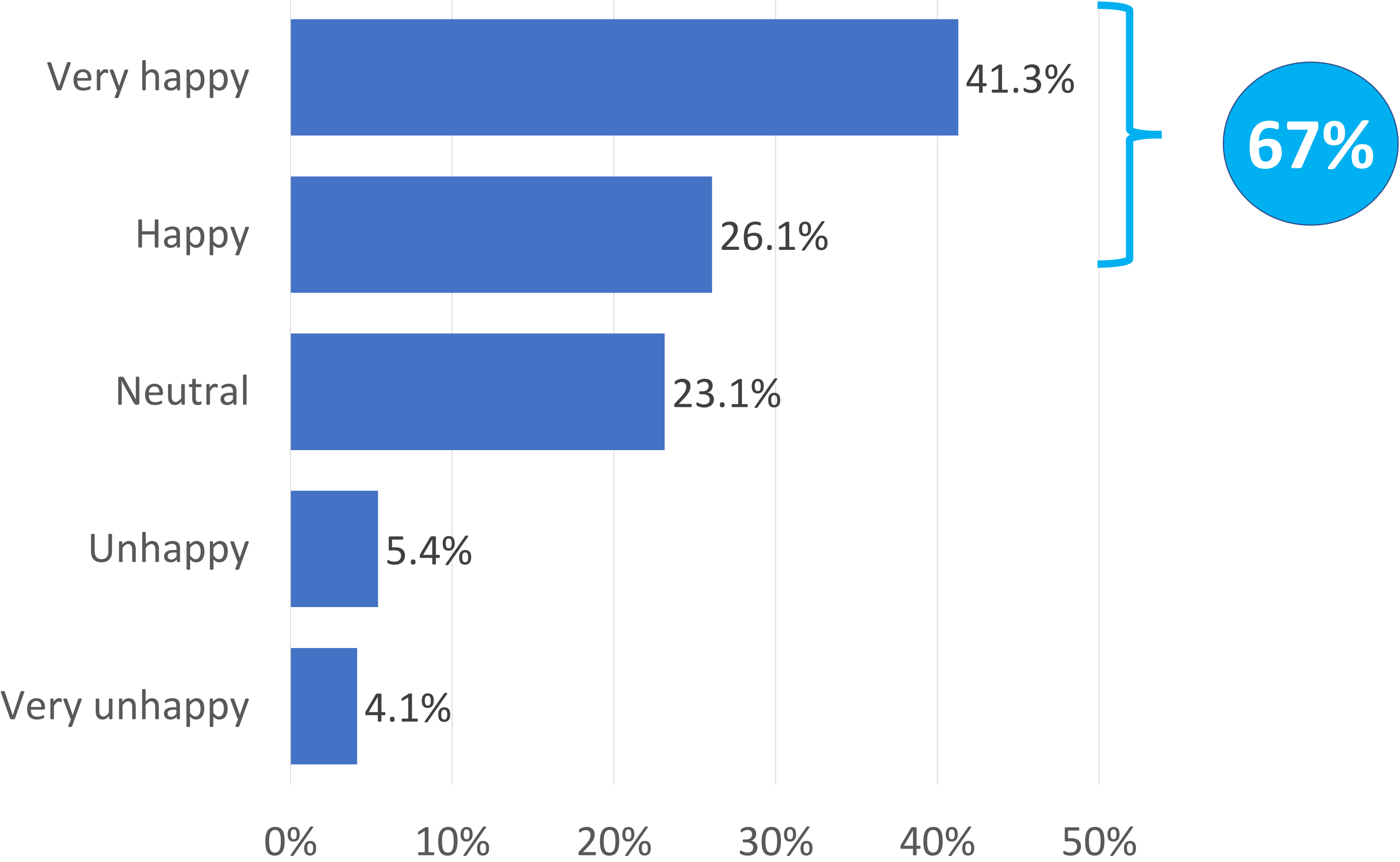




# FEELINGS ABOUT DESTINATIONS REQUIRING MASKS

**Question:** Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*





# Who is Unhappy with Masks

- **Significantly less concerned with personal safety and the safety of friends and family**
- **Less likely to know someone who has contracted the virus**
- **Twice as likely to believe the crisis will improve in the next month**

## **Demographics:**

- **Skew Male**
- **Less Affluent**
- **Less likely to have higher education**
- **Less Diverse**
- **More likely to live in Rural areas**

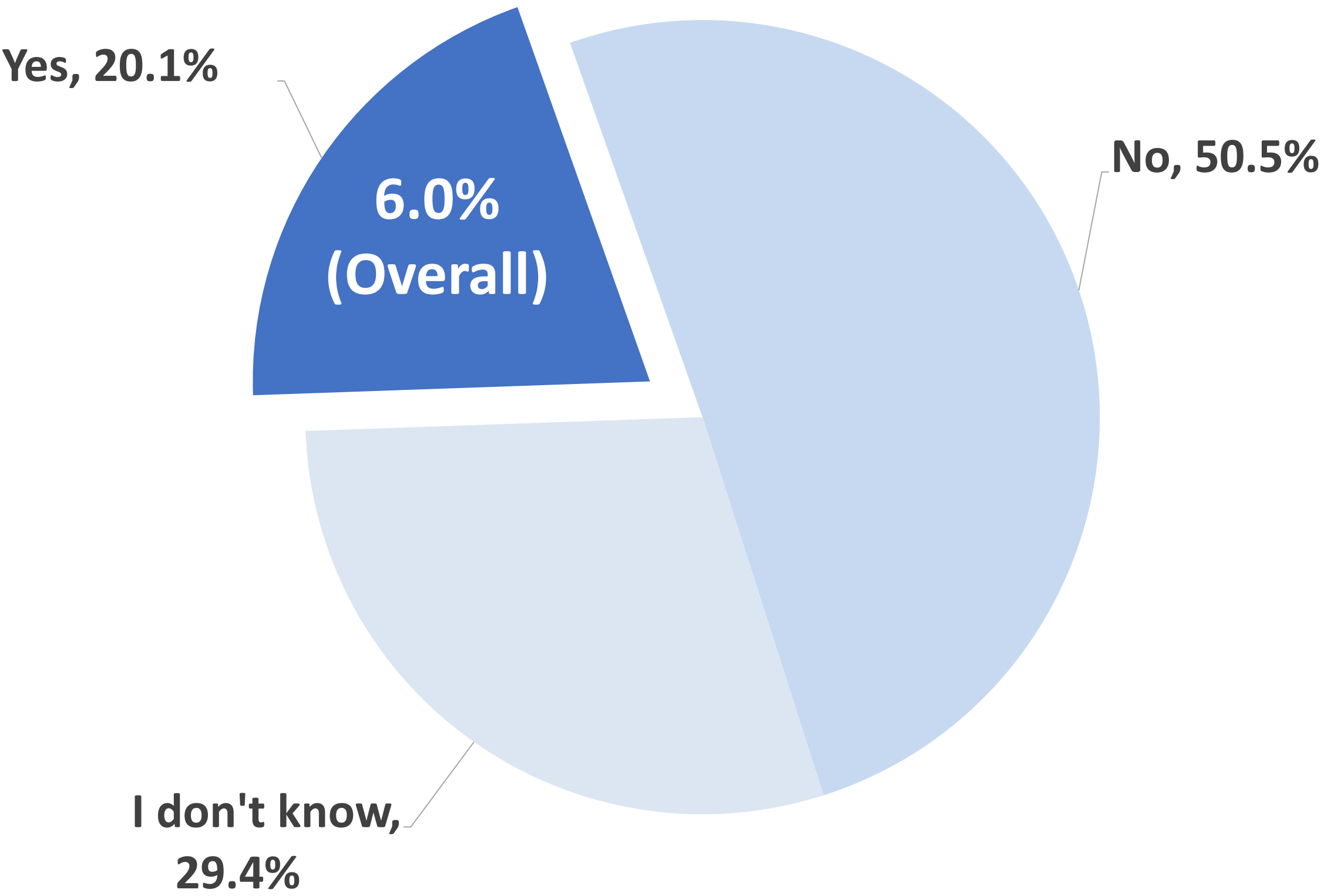




# FACE MASKS AS AN IMPEDIMENT TO TRAVEL

**Question:** Would this requirement alone be enough to keep you from visiting a place you otherwise wanted to visit?

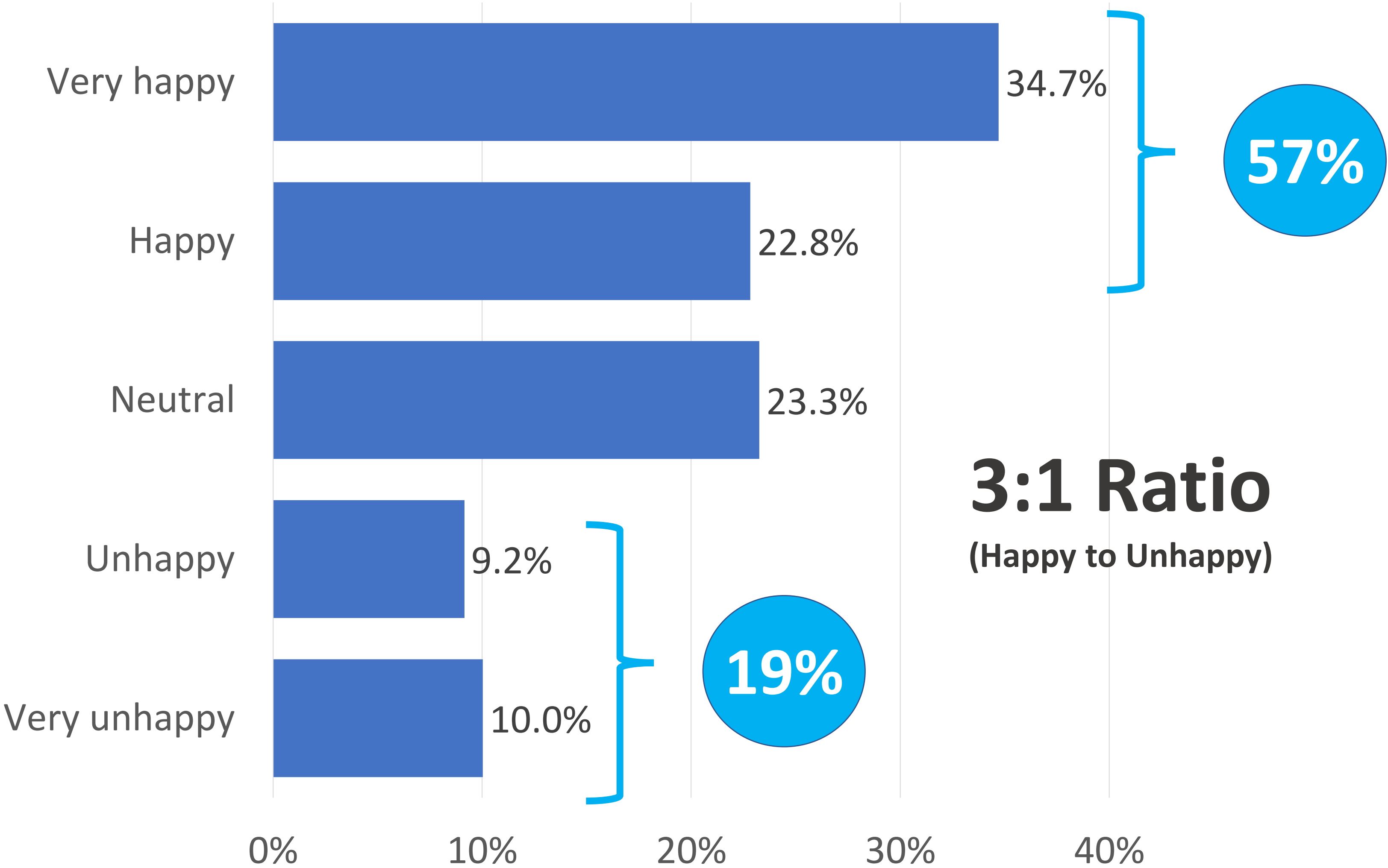
*(Base: Wave 19 data. Respondents neutral, unhappy or very unhappy about face mask requirements, 389 completed surveys. Data collected July 17-19, 2020)*



# FEELINGS ABOUT FINES FOR NON-COMPLIANCE WITH MASK REGULATIONS

**Question:** Which best describes how you would feel if a destination you wanted to visit was giving tickets with fines to people who do not wear face masks in public?

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



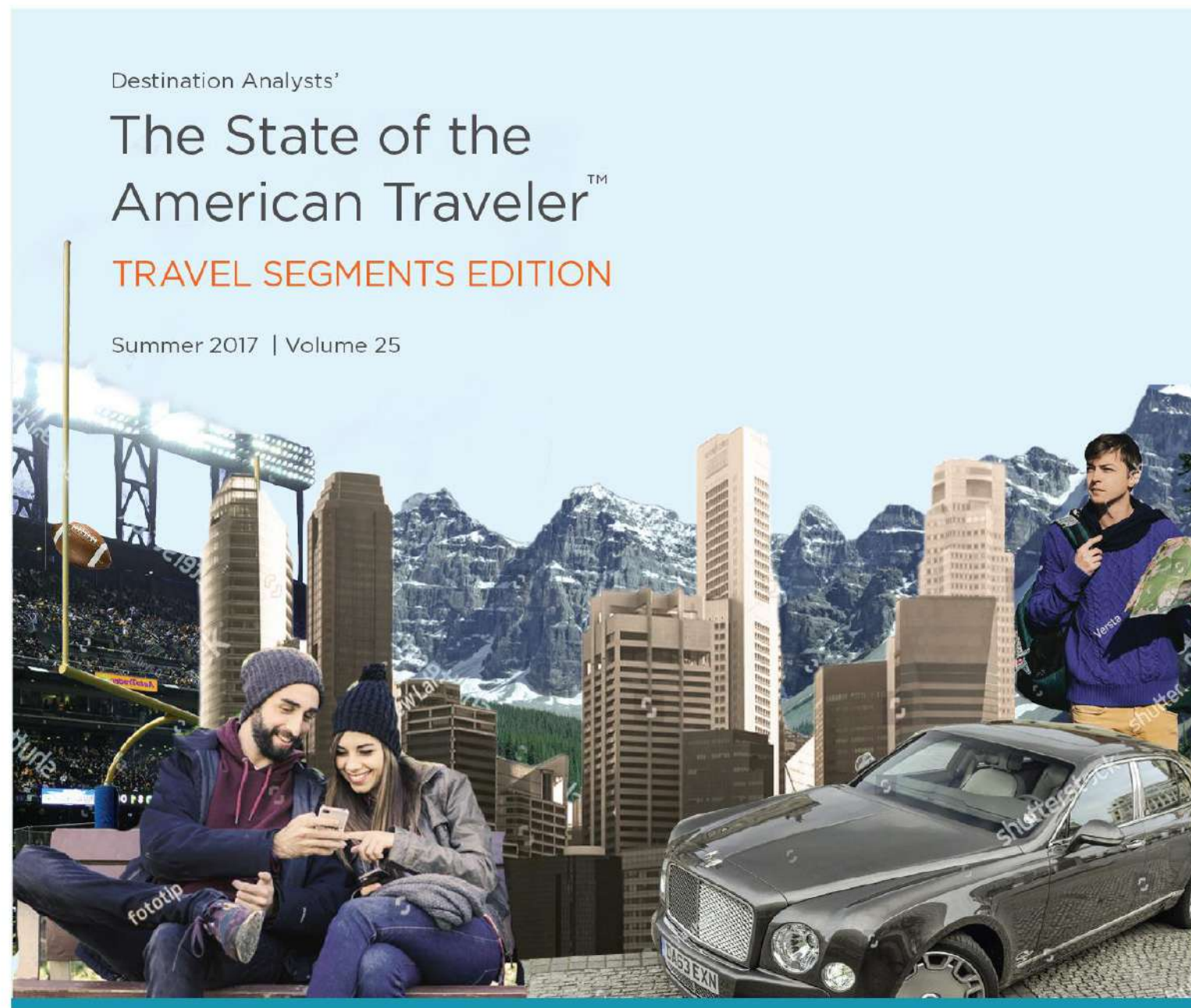


# **BENCHMARKING TRAVELER SENTIMENT TO THE PRE-PANDEMIC PERIOD**





# The State of the American Traveler



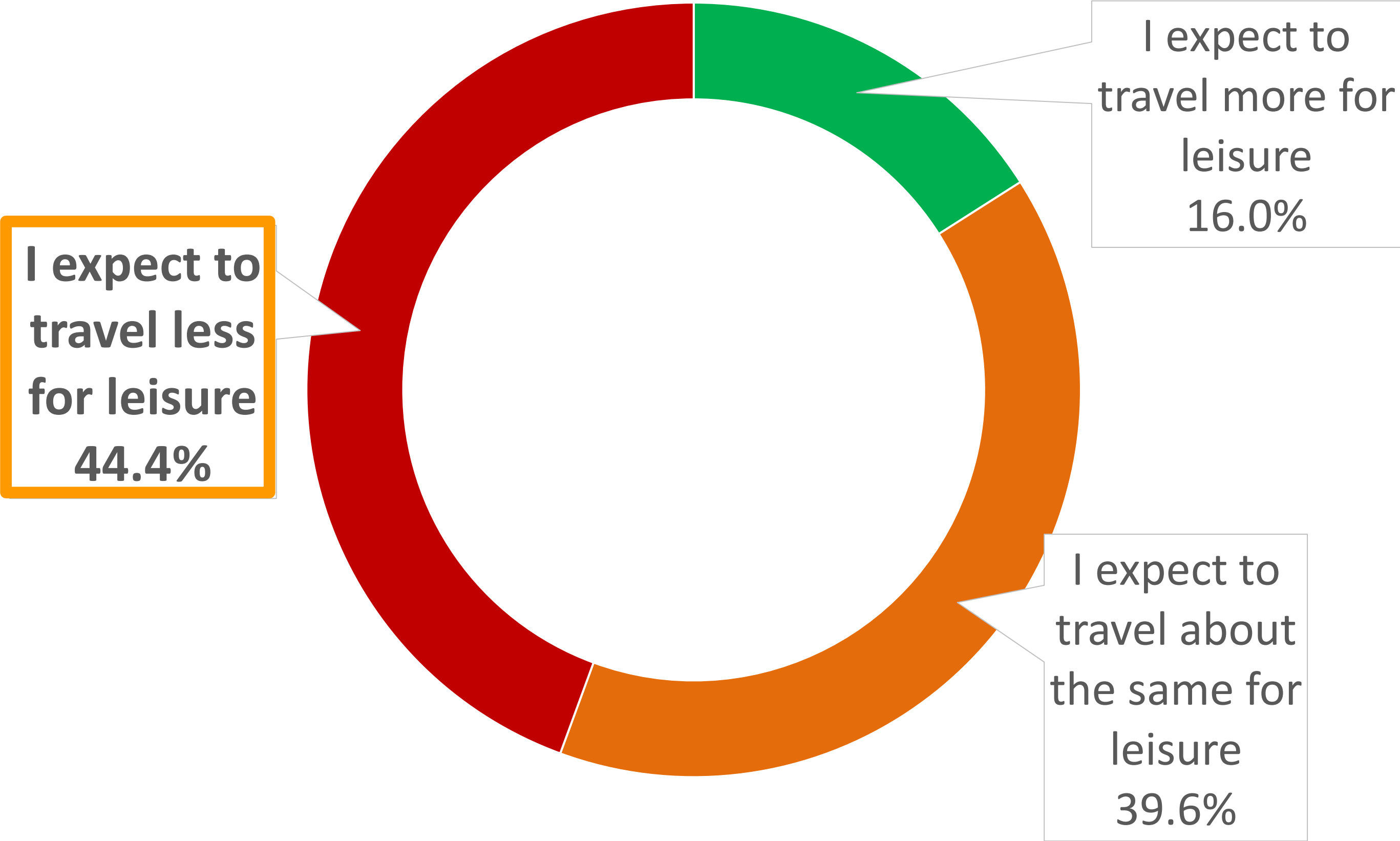
- Online survey conducted since 2006
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000 American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- Quarterly project



# LEISURE TRAVEL EXPECTATIONS (TRIP VOLUME)

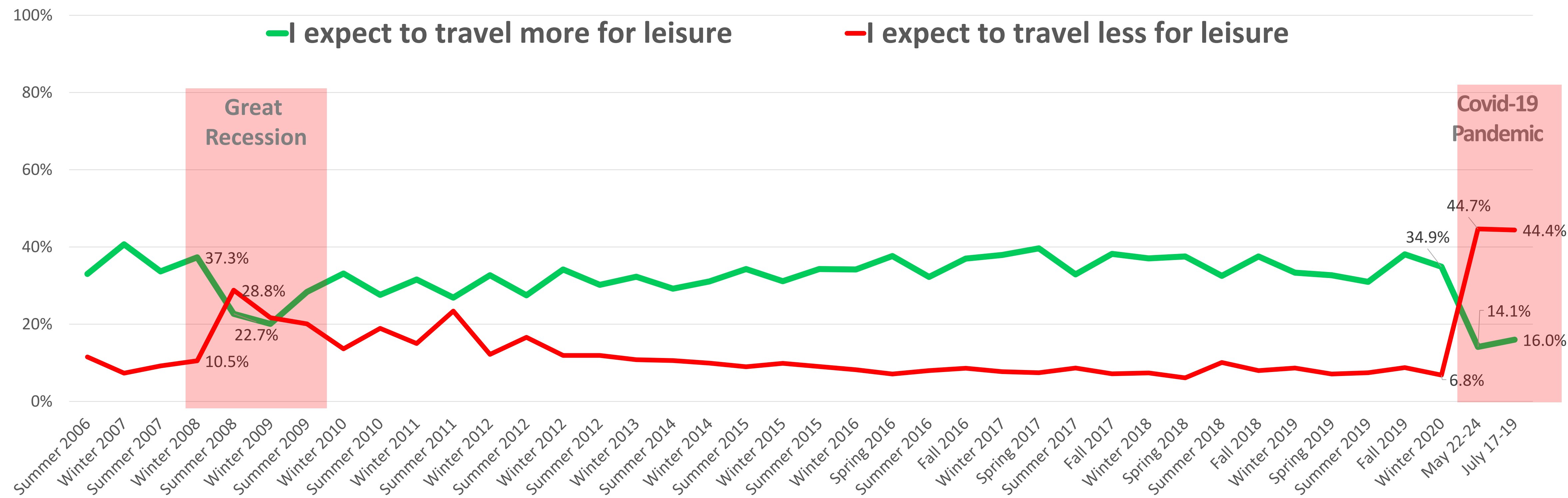
**Question:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)

*(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)*



# HISTORICAL PERSPECTIVE: LEISURE TRAVEL EXPECTATIONS (TRIPS TAKEN)

**Question:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?



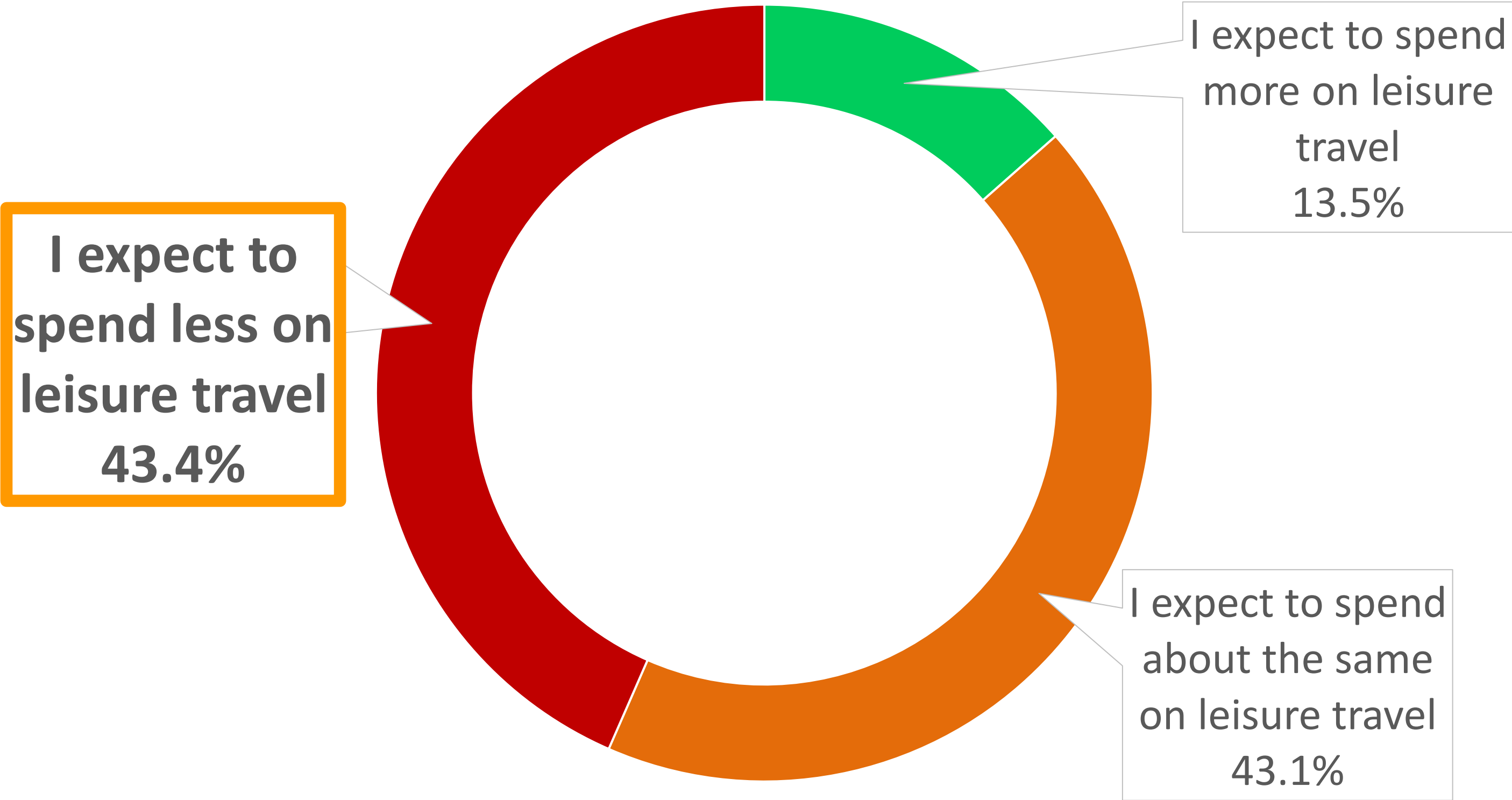
(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)



# LEISURE TRAVEL EXPECTATIONS (SPENDING)

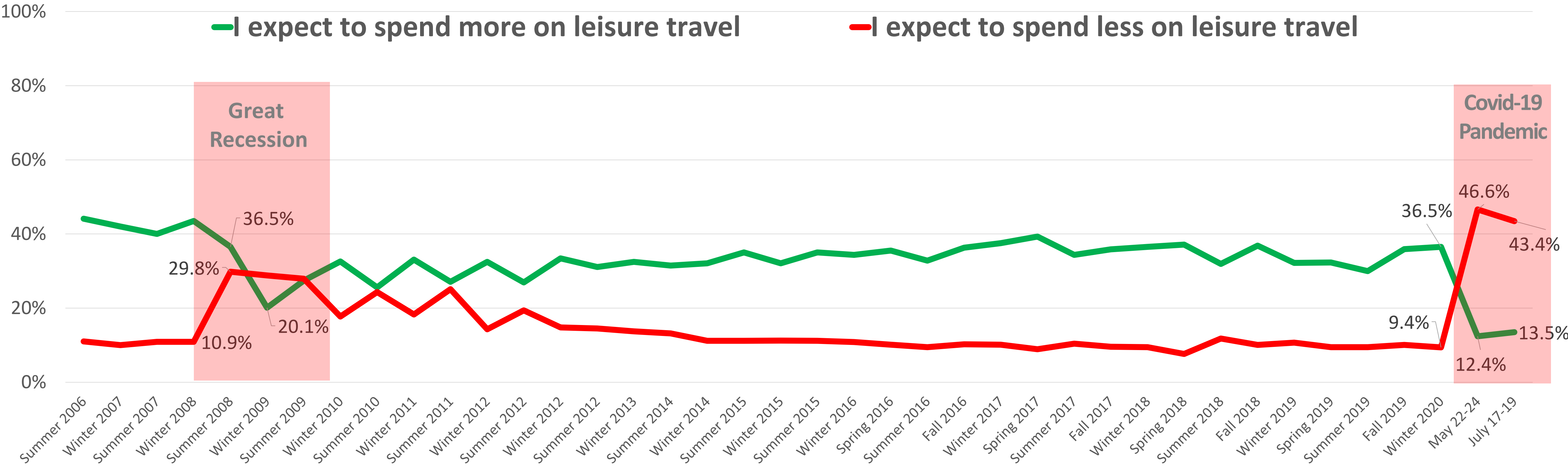
**Question:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?  
(Select one)

*(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)*



# HISTORICAL PERSPECTIVE: LEISURE TRAVEL EXPECTATIONS (SPENDING)

**Question:** In the next 12 months, do you expect to spend more or less for leisure than you did in the most recent 12-month period?



(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)



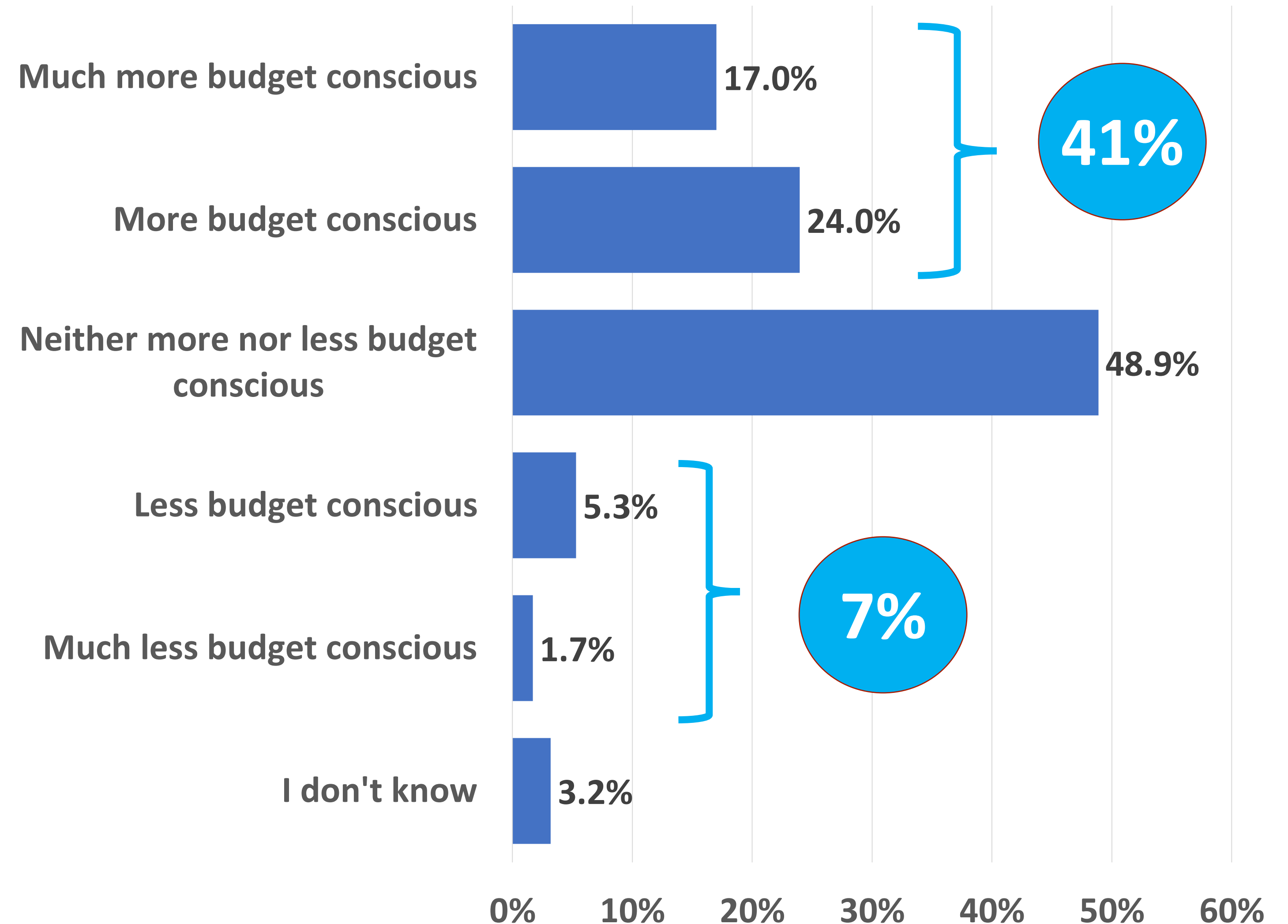
# TRAVEL AS A BUDGET ITEM



# THE PANDEMIC'S IMPACT OF DISPOSABLE INCOME

**Question:** On your next leisure trip, do you expect to be more or less budget conscious than you were in the period before the Coronavirus situation?

*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*

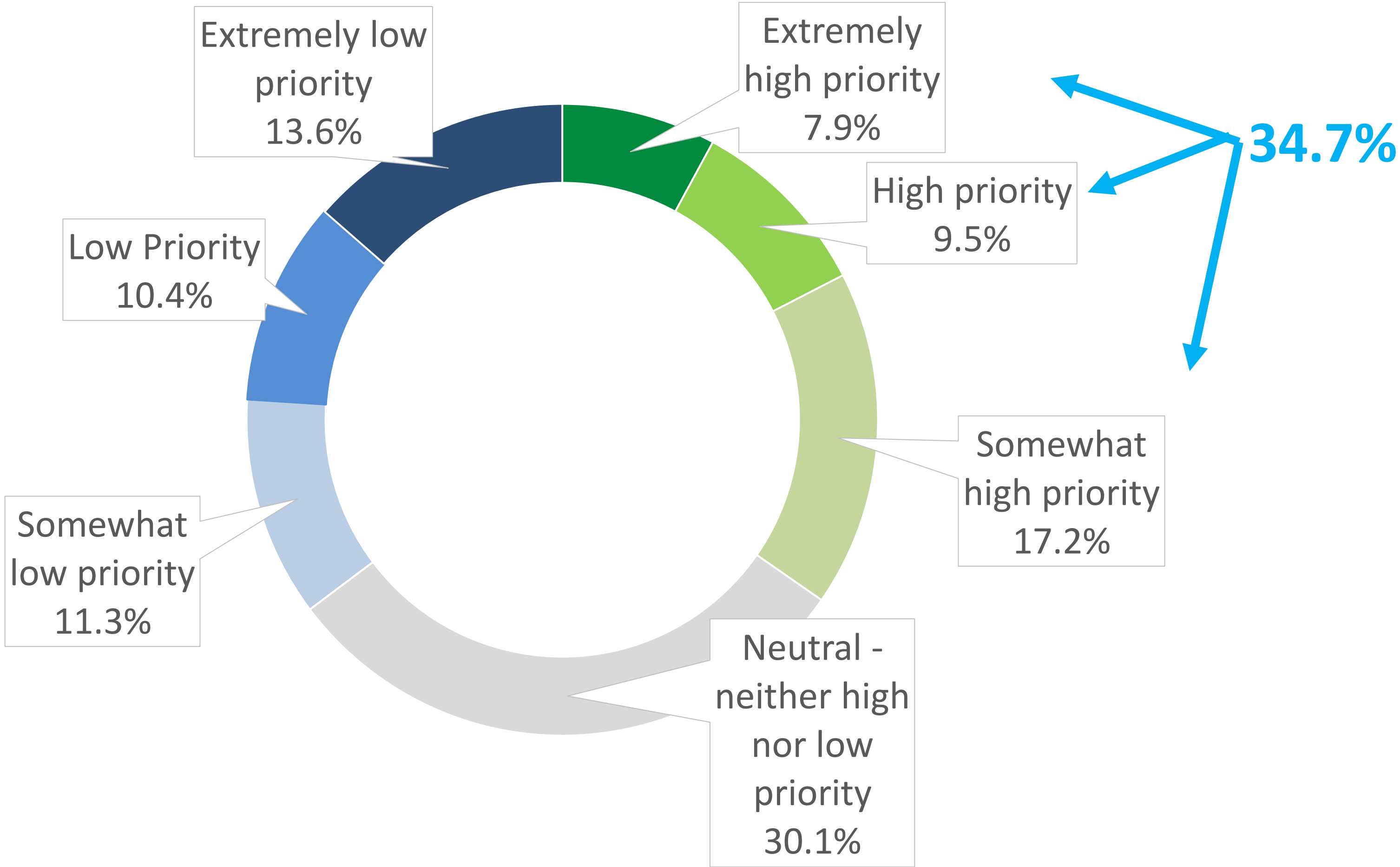




# LEISURE TRAVEL AS A BUDGET PRIORITY

**Question:** Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

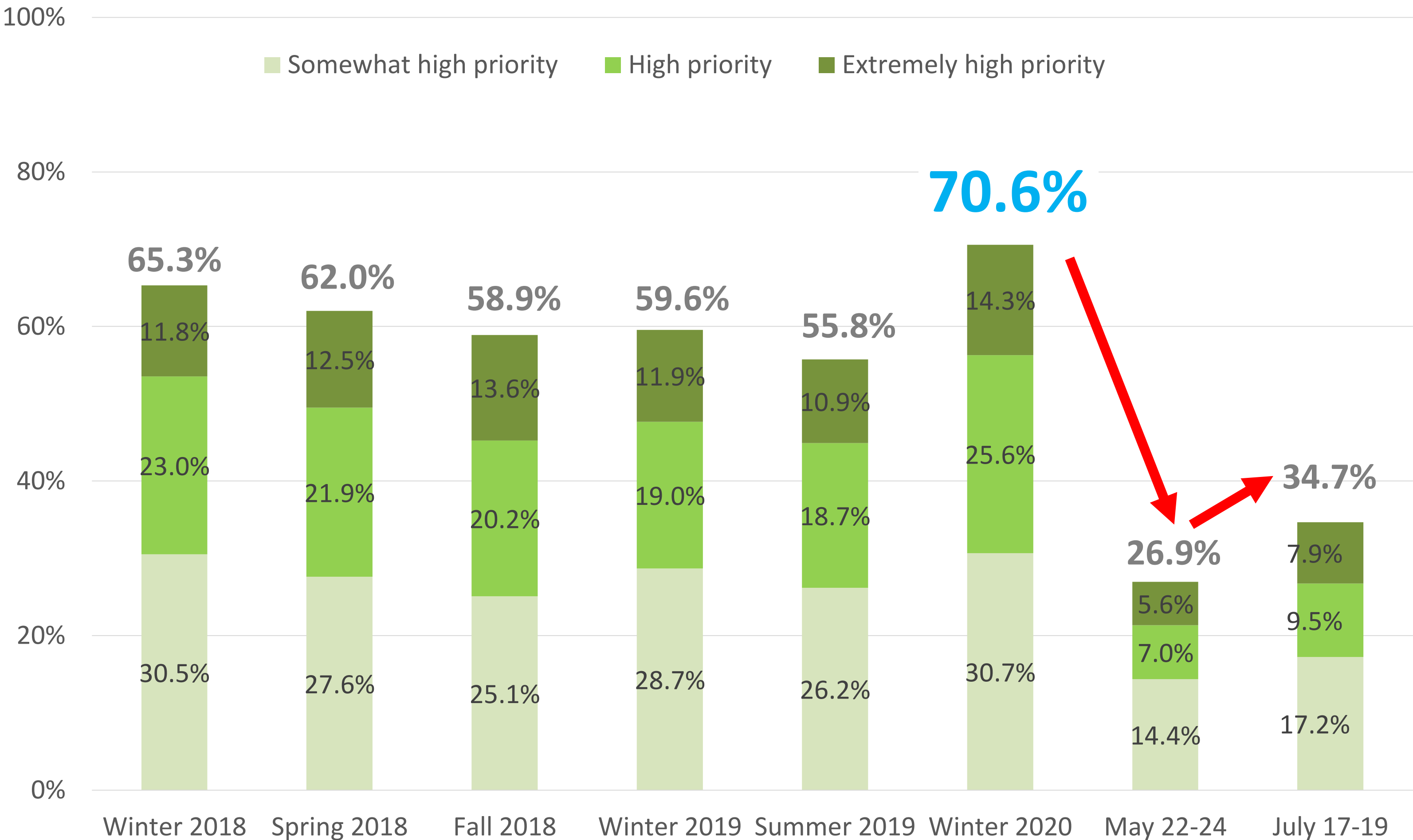
*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



# HISTORICAL PERSPECTIVE: LEISURE TRAVEL AS A BUDGET PRIORITY

**Question:** Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

*(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)*

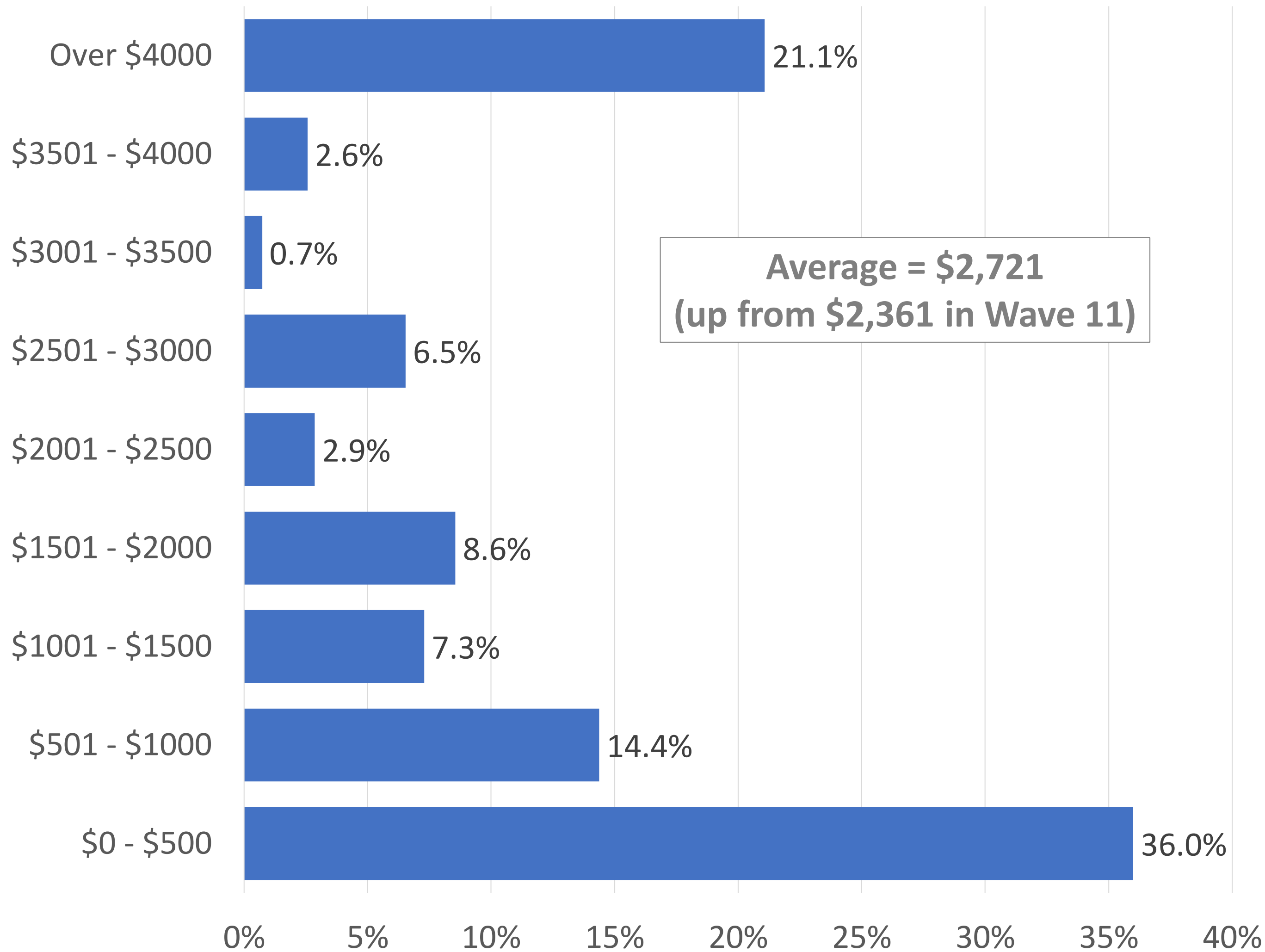




# EXPECTED LEISURE TRAVEL SPENDING (NEXT 12 MONTHS)

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

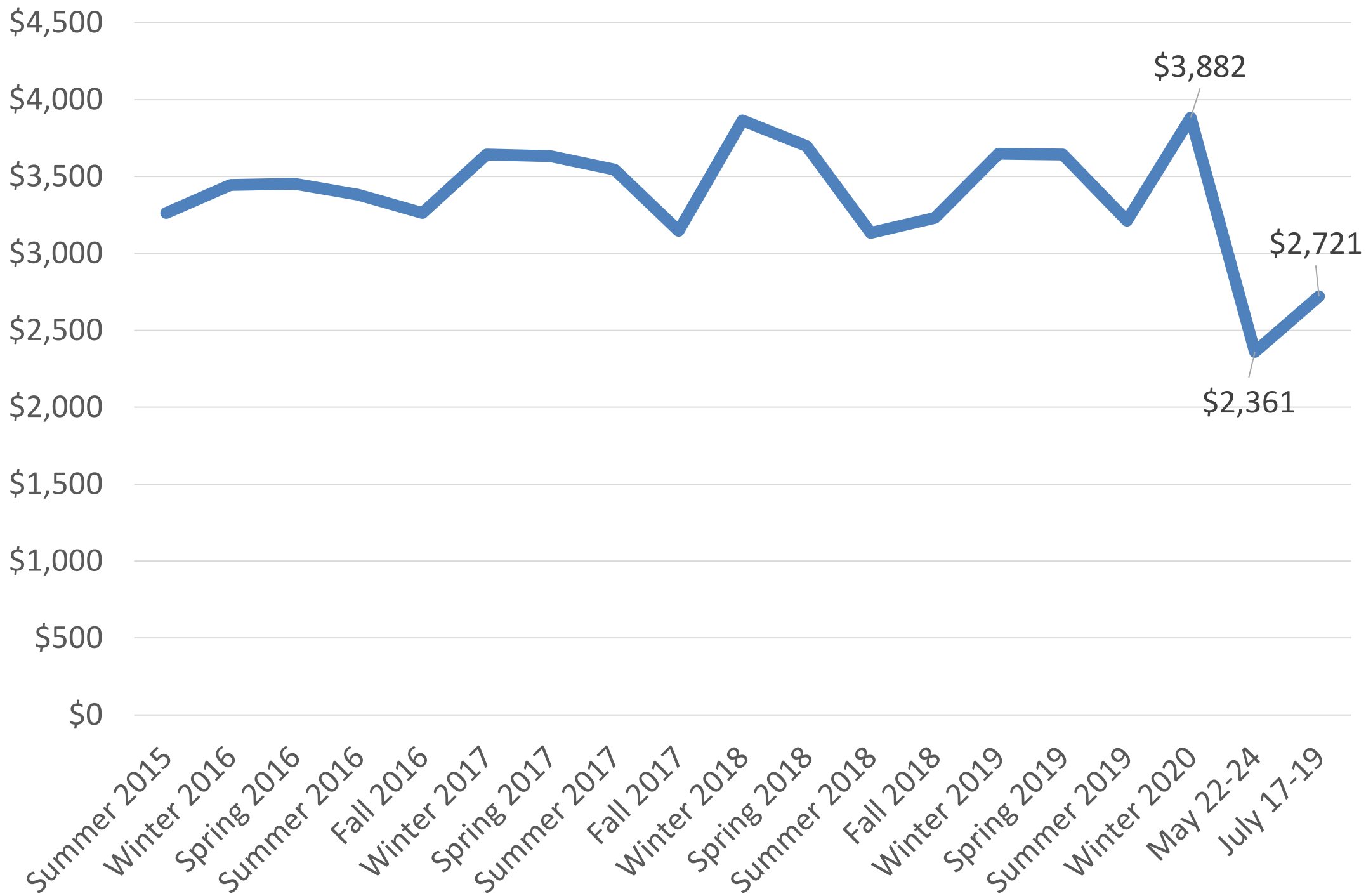
*(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)*



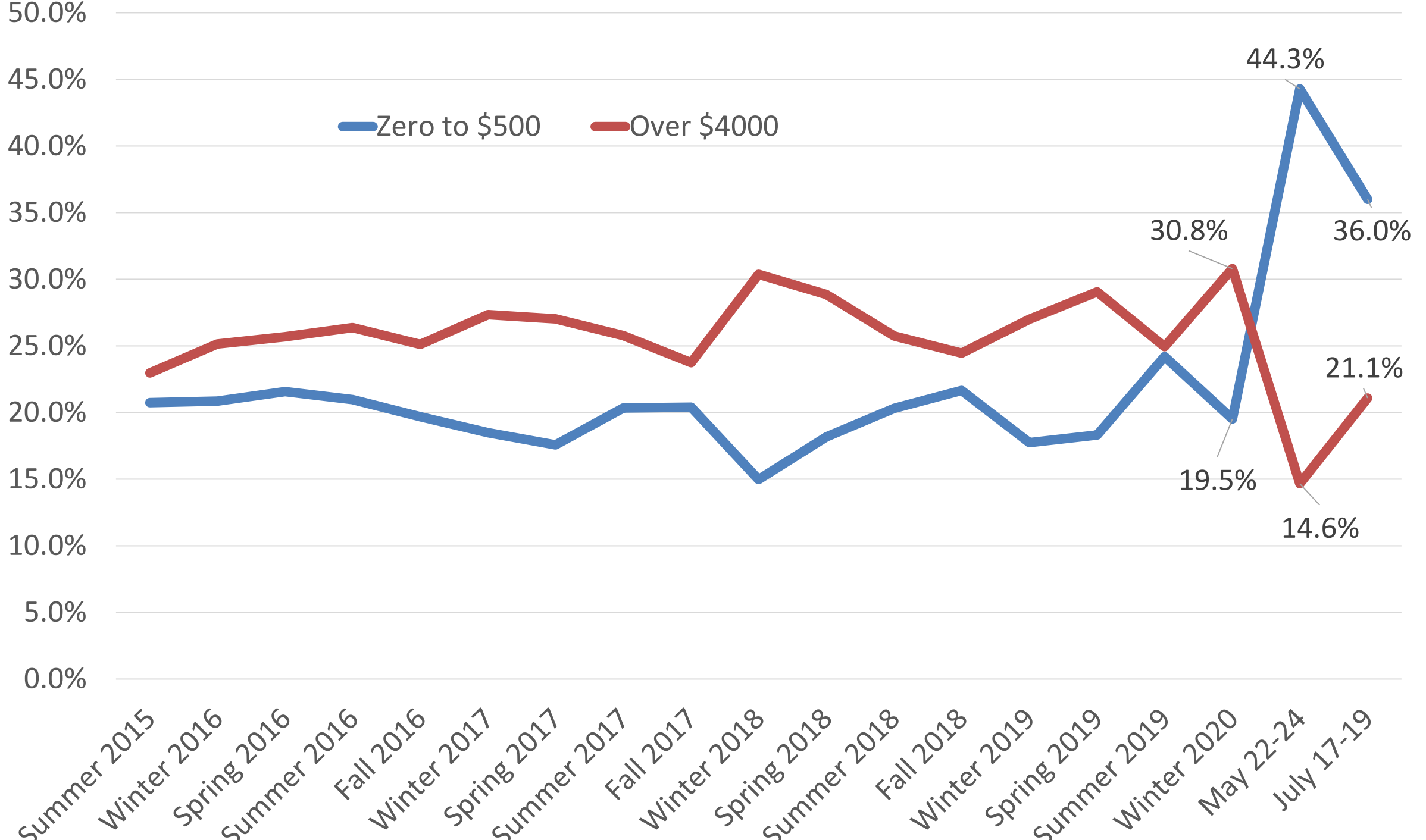
# EXPECTED LEISURE TRAVEL SPENDING (NEXT 12 MONTHS)

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

Average Expected Spending



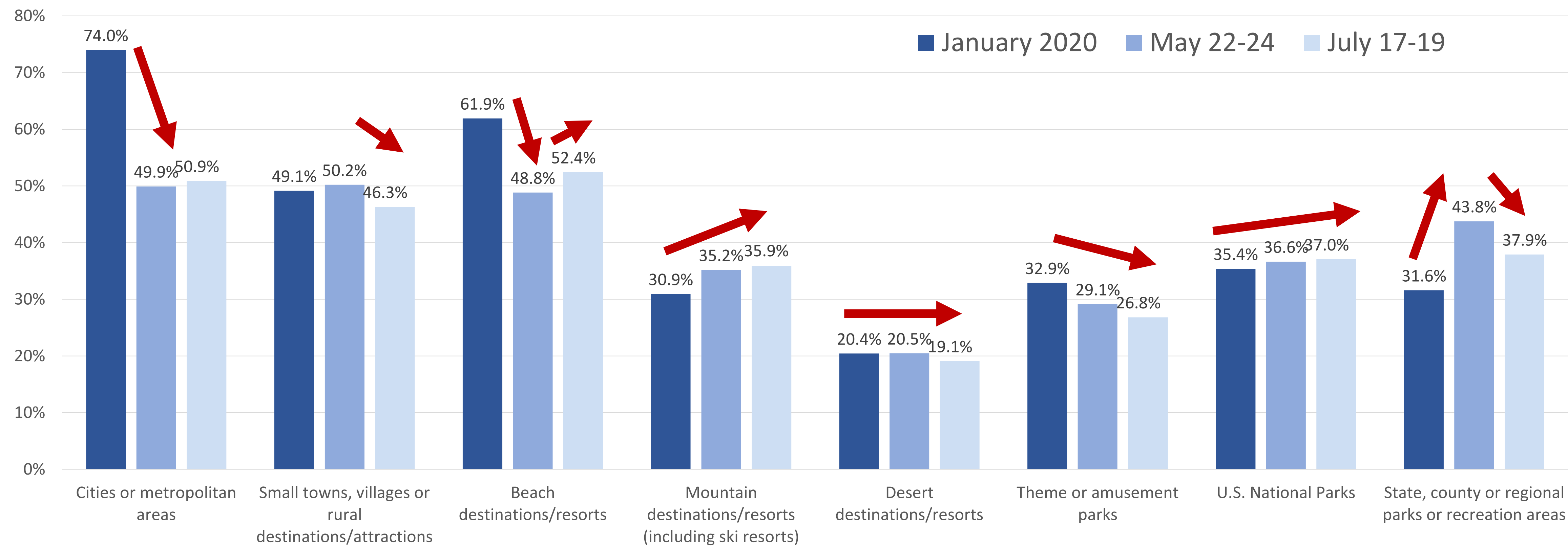
% in the Highest/Lowest Spending Categories





# LEISURE TRAVEL BY DESTINATION TYPE (INTENT TO VISIT, NEXT 12 MONTHS)

**Question:** In the next 12 months, HOW MANY TRIPS will you take that will include each of the following types of leisure destinations?

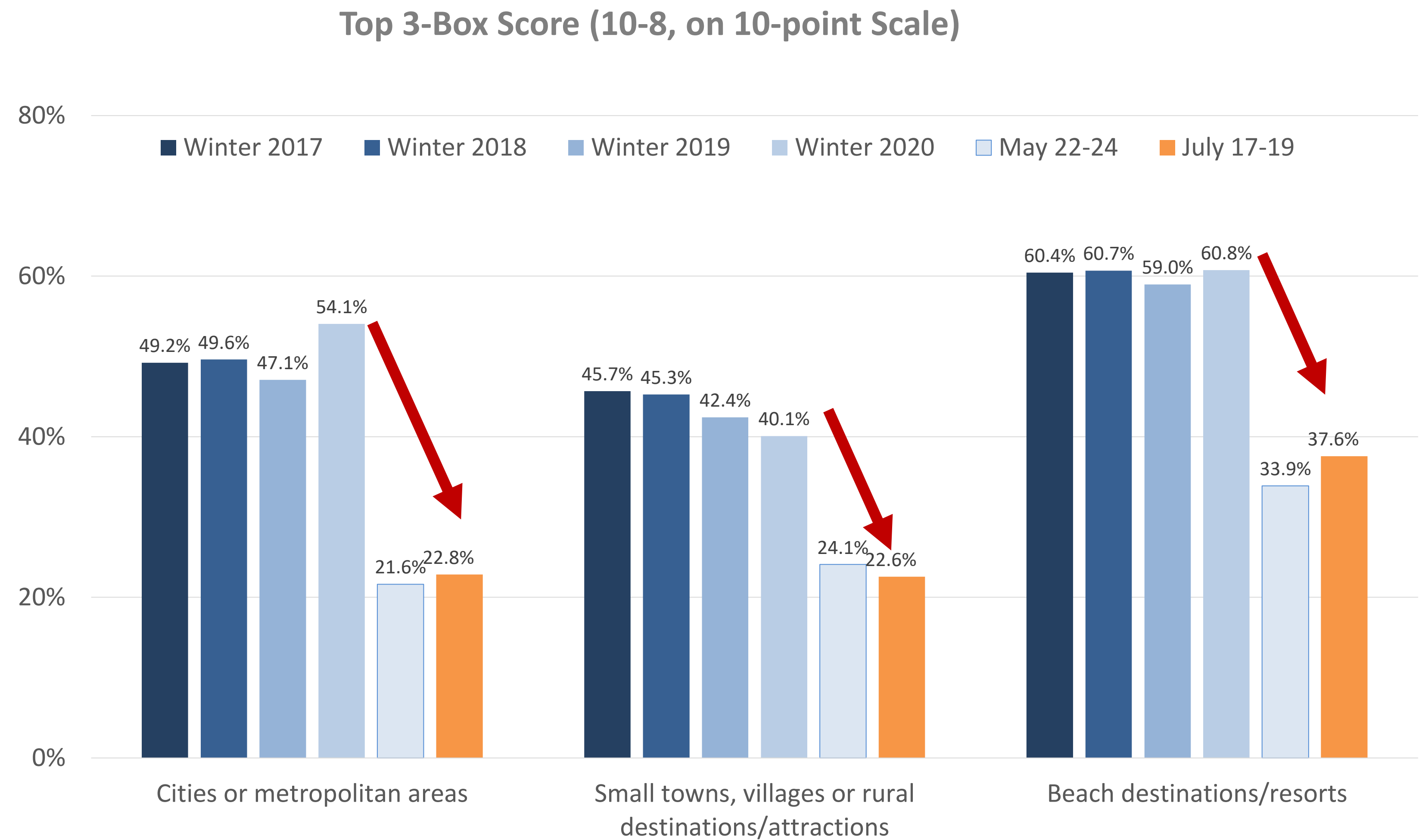


(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)

# EXCITEMENT FOR EACH DESTINATION TYPE (TOP 3-BOX SCORE)

**Question:** Thinking carefully about the destinations you are MOST EXCITED TO VISIT IN THE NEXT TWELVE (12) MONTHS for leisure reasons.

Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year?



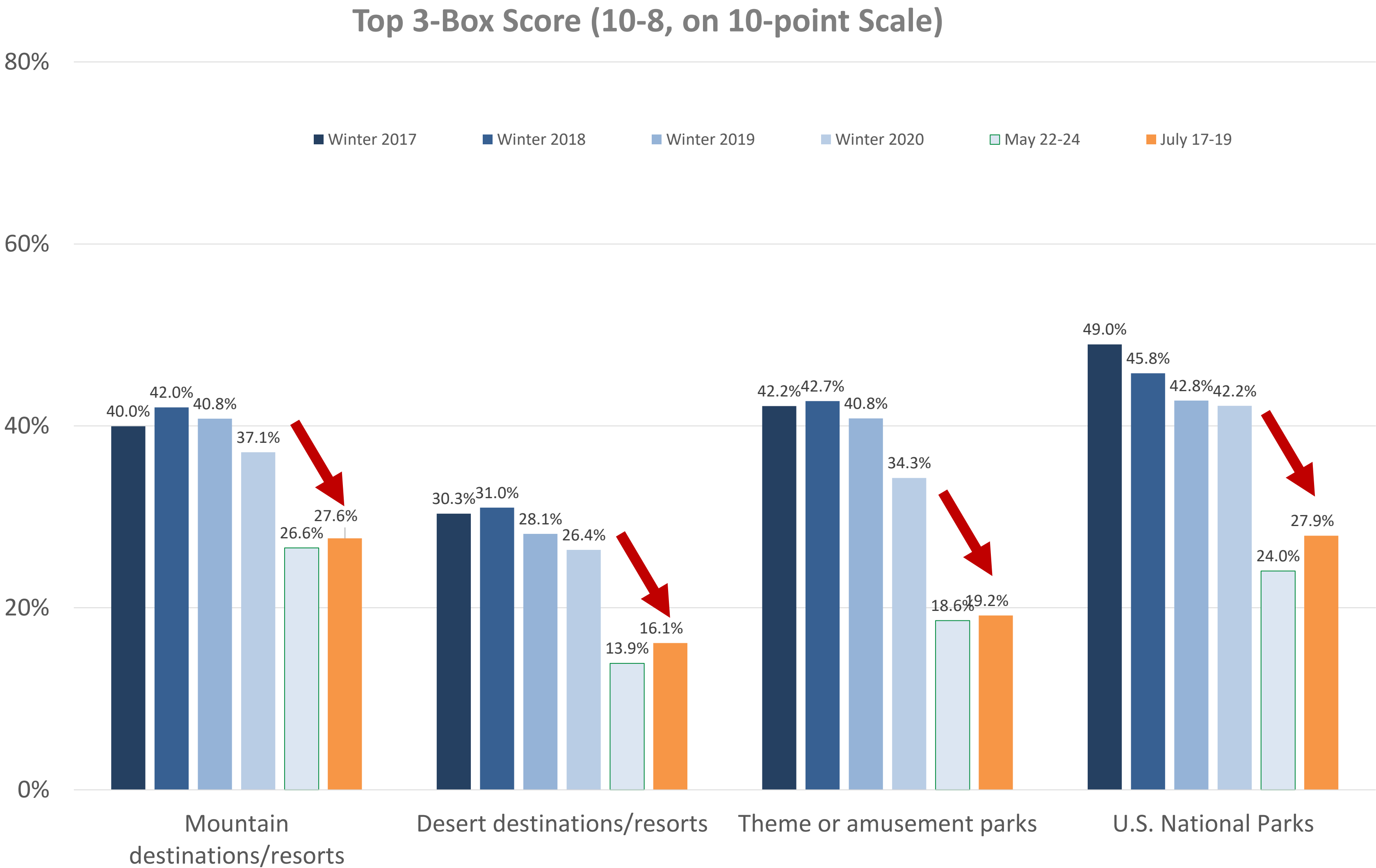
(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)



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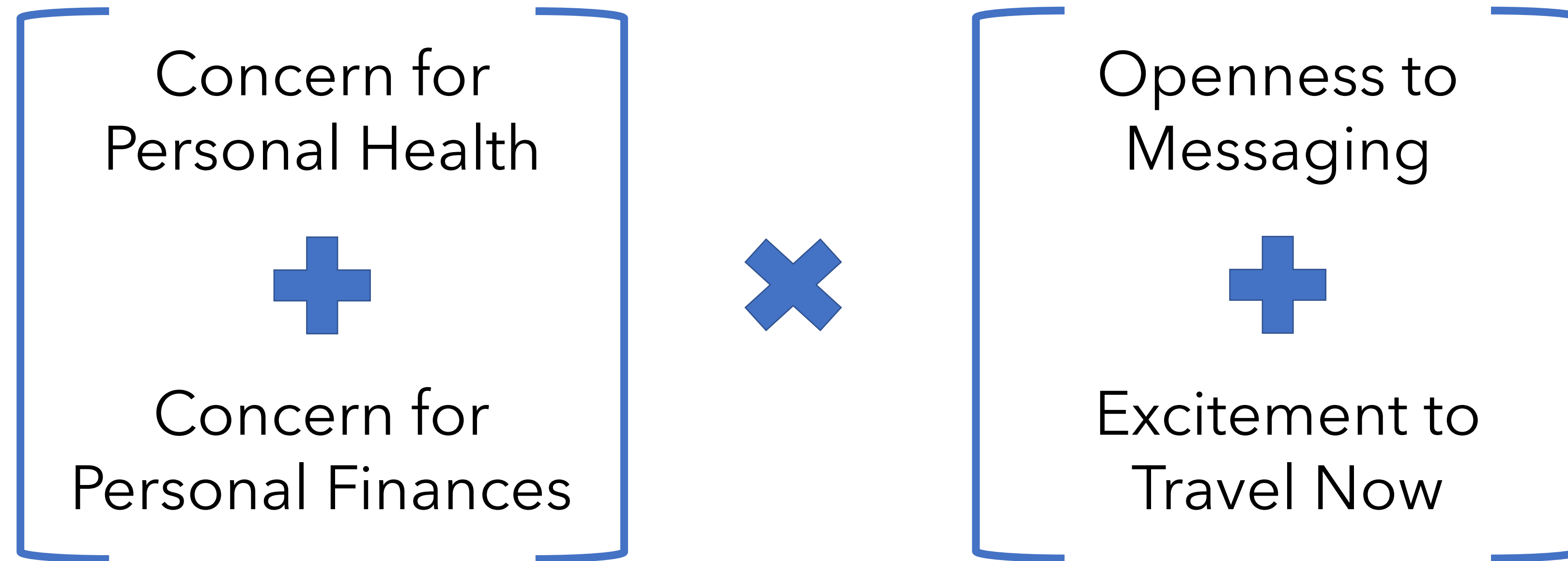
# Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 20th

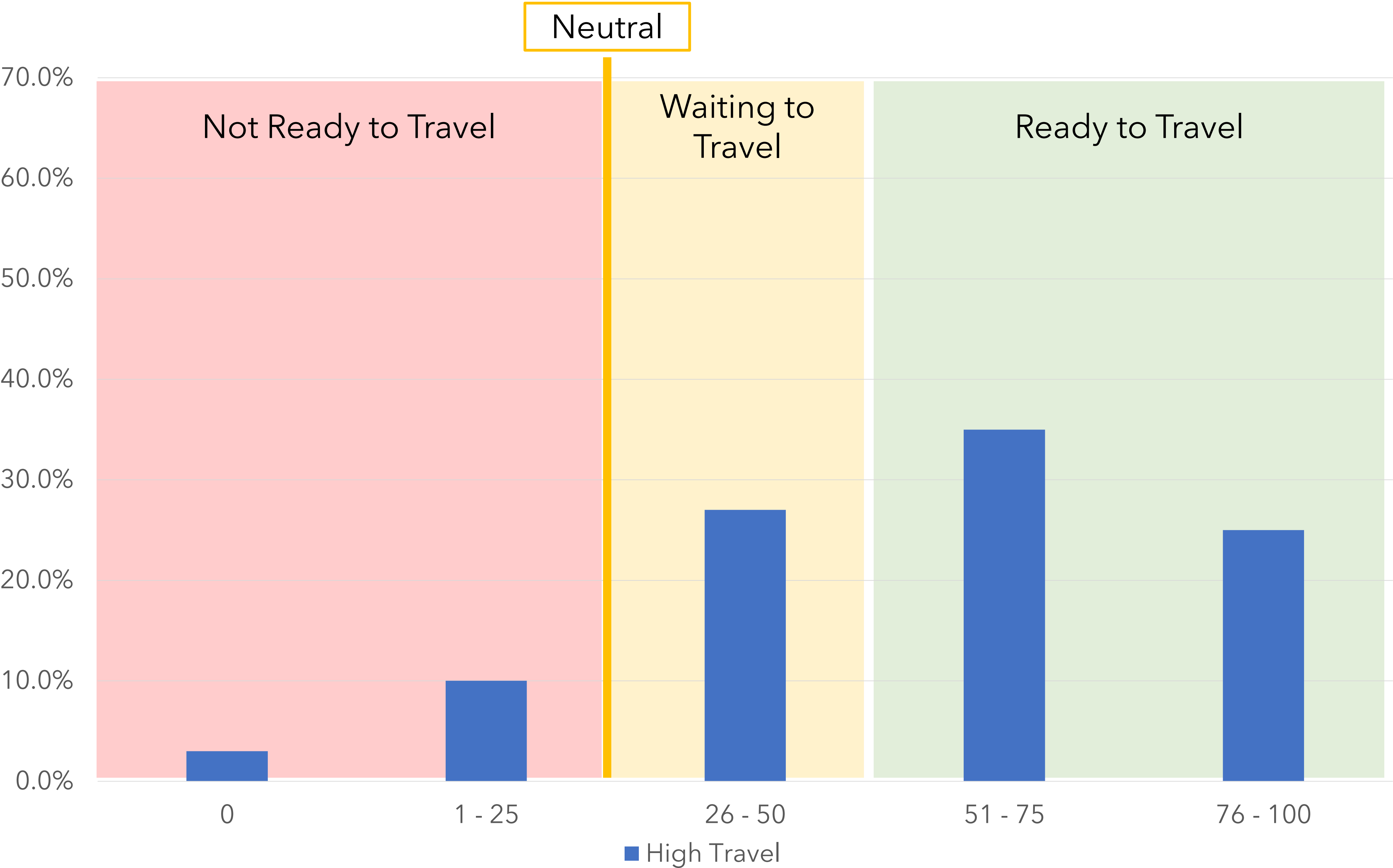


# Predictive Index Formula



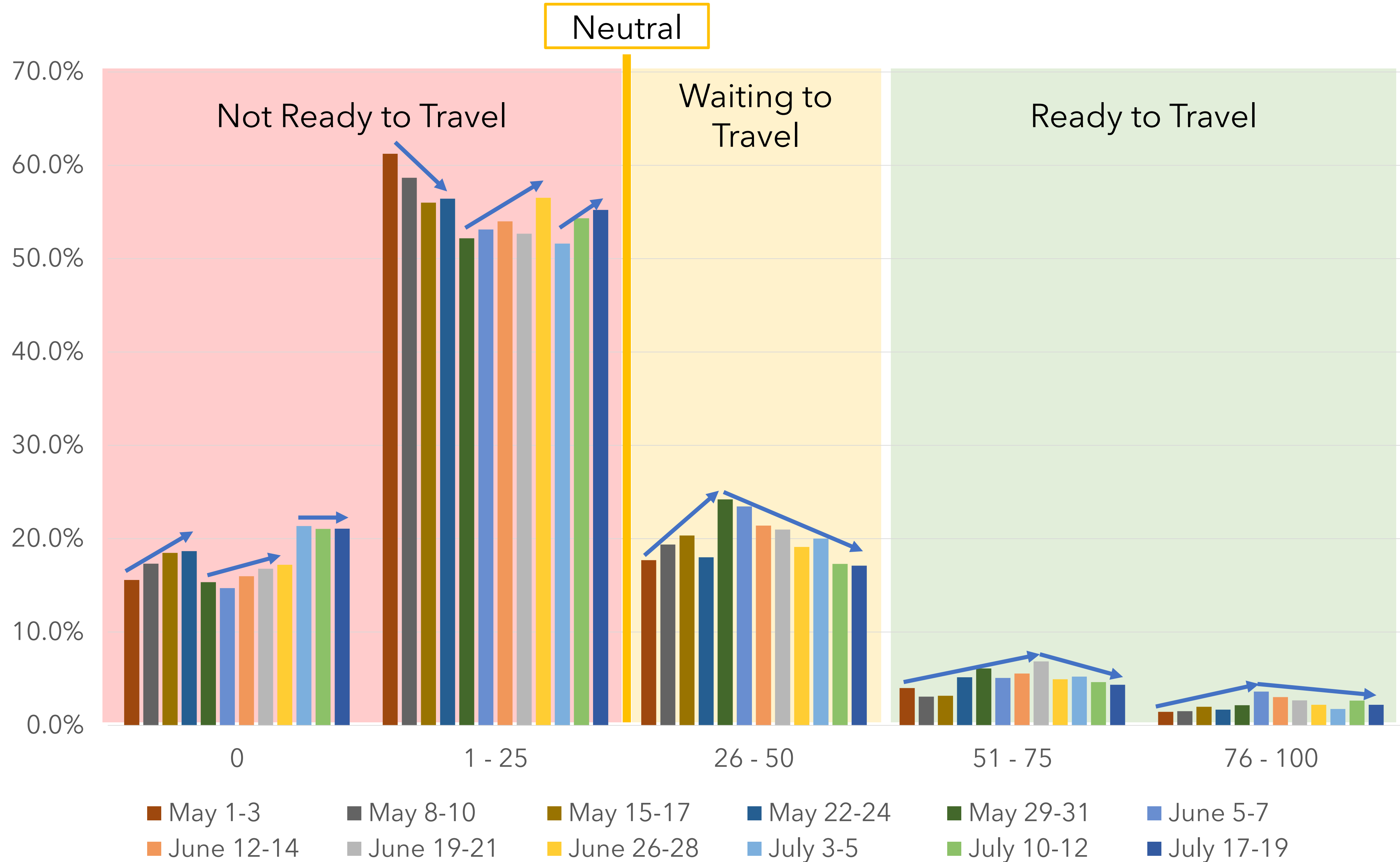
\*Normalized to a 100pt scale

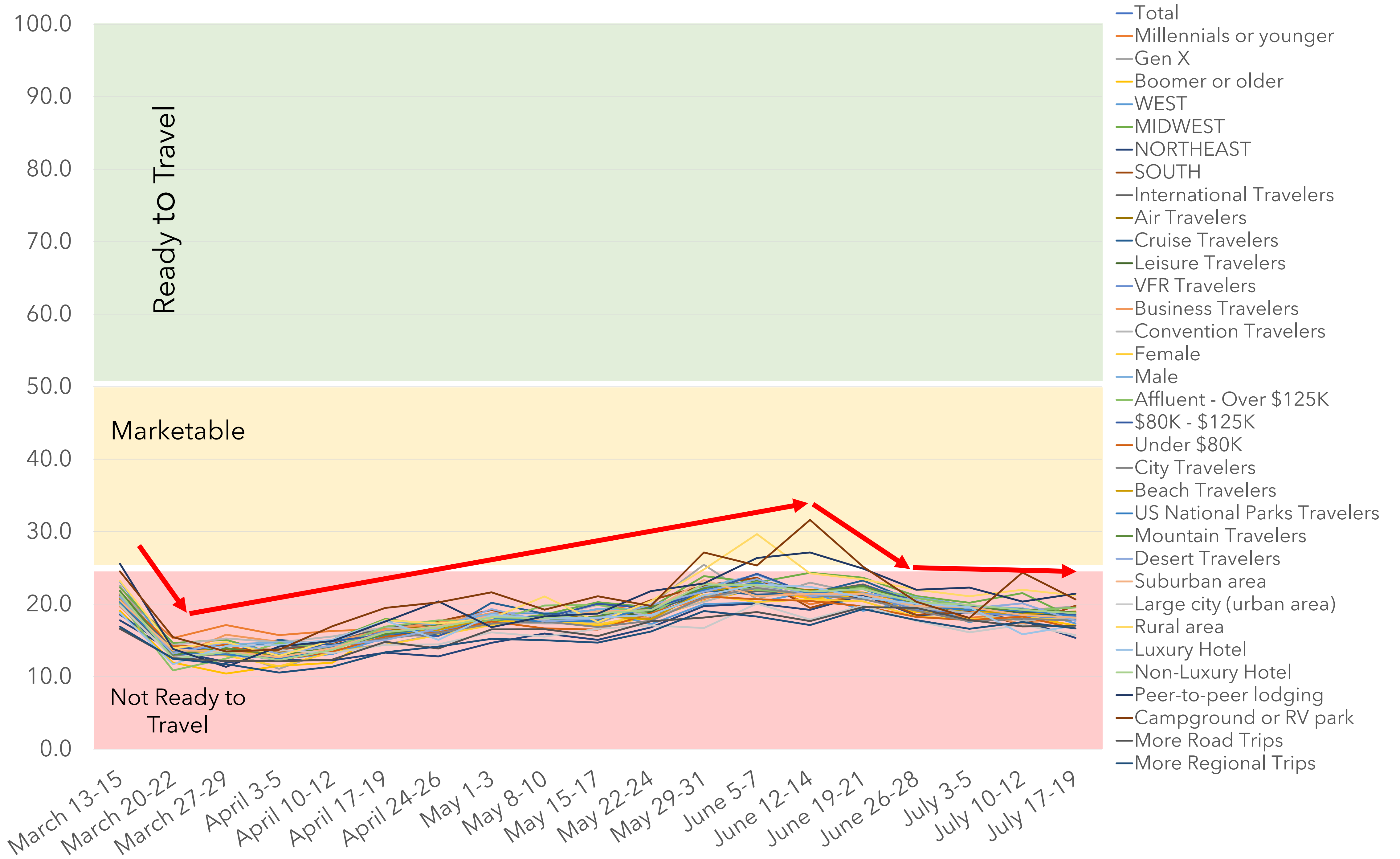
# Healthy Travel Outlook





# Travel Outlook



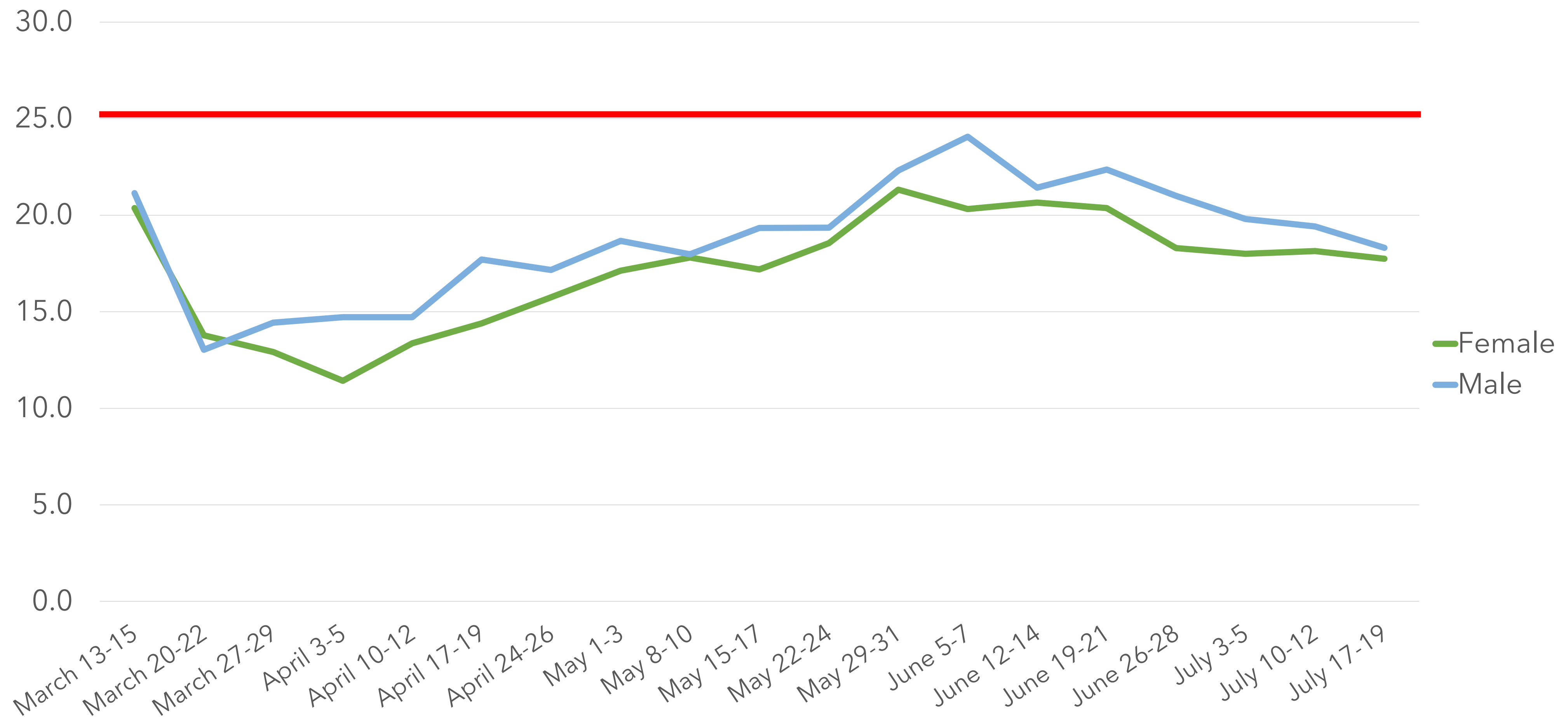




# Gender

## Points of Interest:

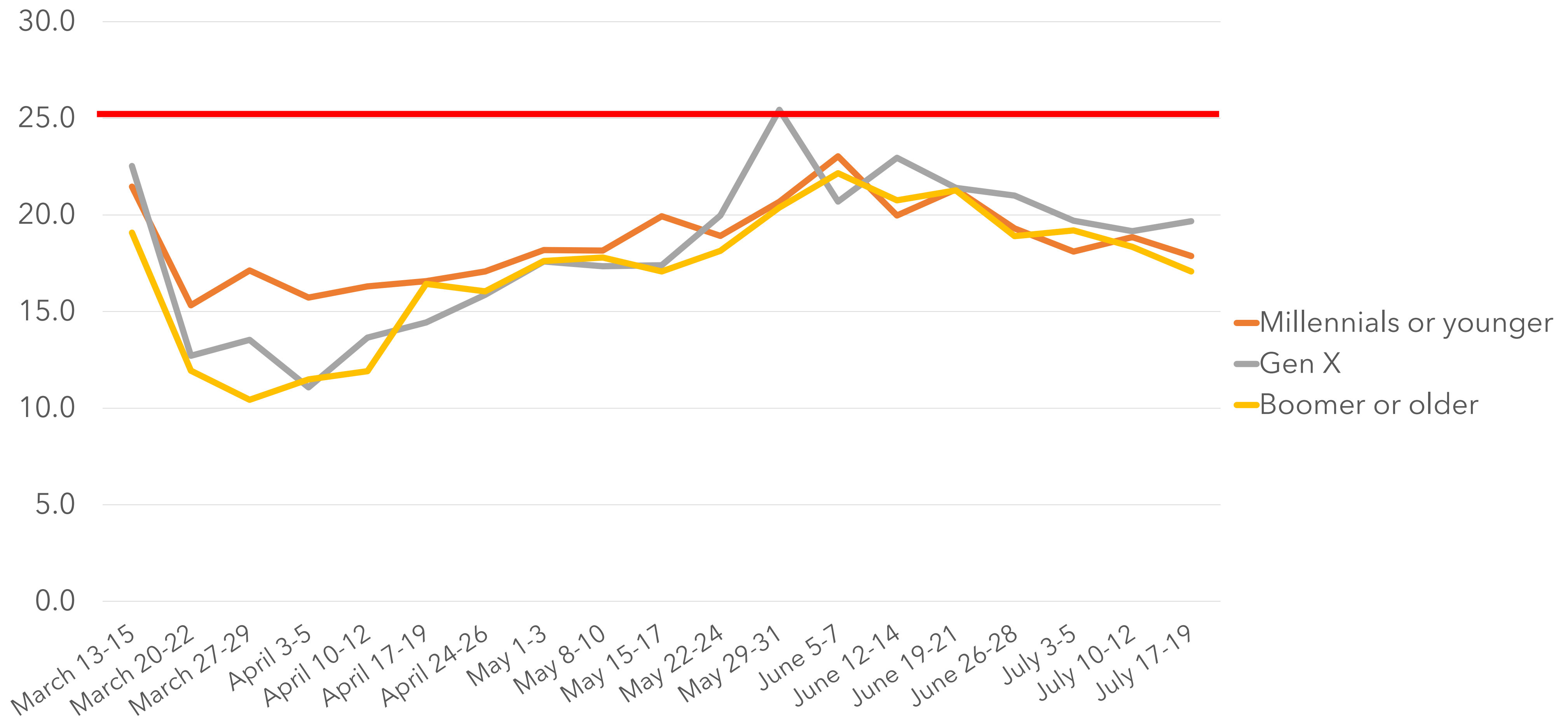
- Safety concerns showed very little movement for both Men and Women this week.
- This week 49.3 percent of Women reported they have no plans to travel in 2020 (up from 45.3% last week).
- One-in-five Men this week (20.4%) said they are already traveling or ready to travel with no hesitations (compared to 15.6% of Women).



# Generation

## Points of Interest:

- Gen X continued to index higher than the other generations this week.
- Gen X showed a slight decrease in safety concerns this week compared to the other generations.
- Over a third of Millennials (36.6% up from 33.3% last week) reported they would be Happy or Very happy to see an ad promoting their community for travel (compared to a quarter or less of Gen X and Boomers).

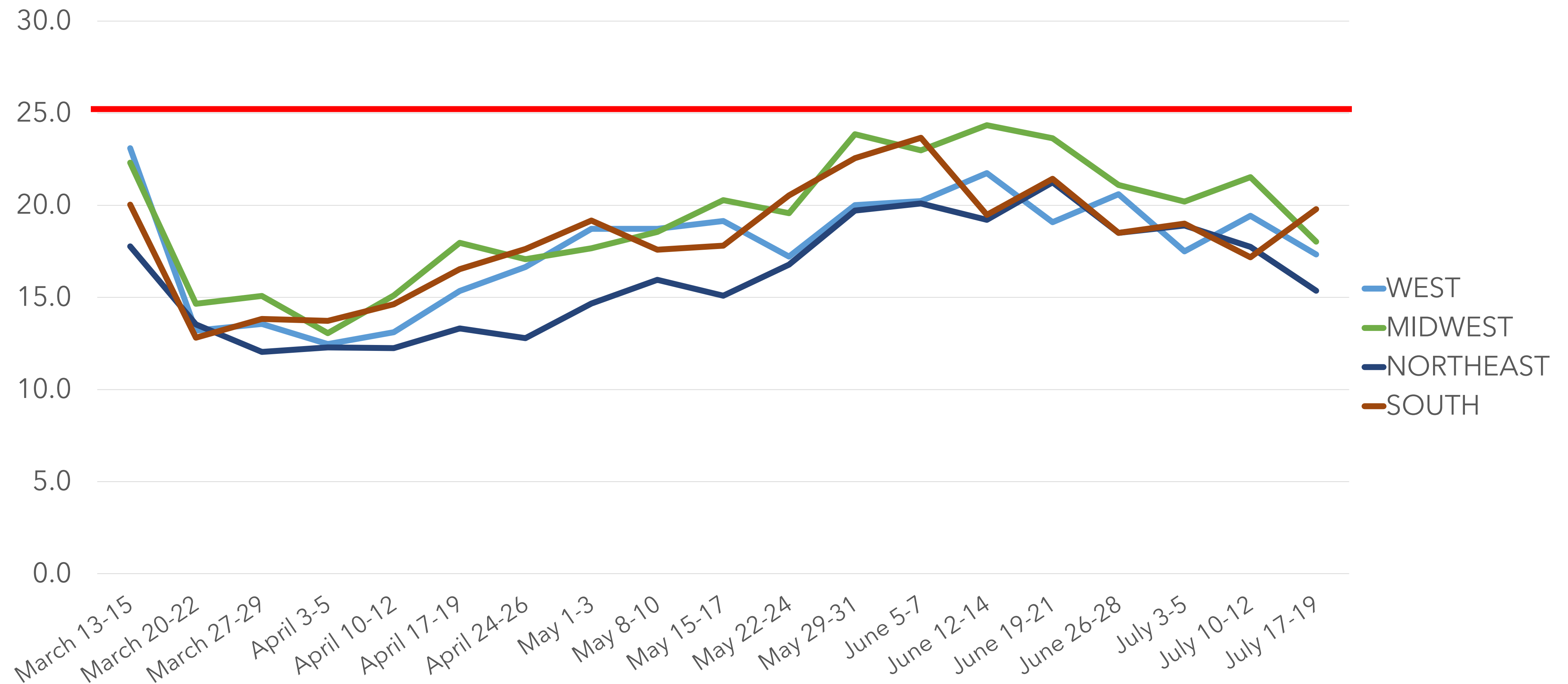




# US Region

## Points of Interest:

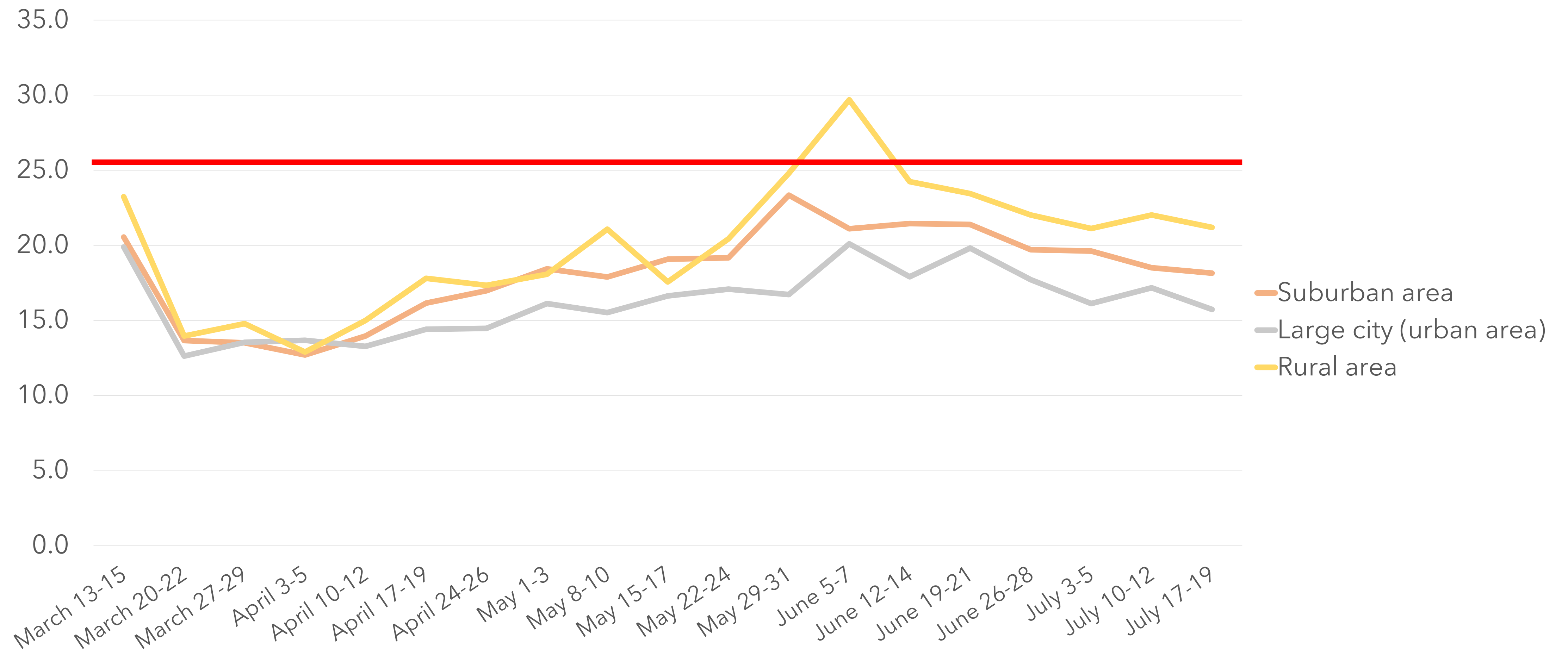
- The South indexed highest amongst US regions this week.
- The South showed a slight decrease in safety concerns this week while the other regions showed increases.
- The Midwest and South regions showed more excitement for travel and openness for travel messaging this week than the other US regions.



# Type Of Residence

## Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Large city Urban respondents reported the relatively highest safety concerns this week.
- Suburban respondents were the most likely to say they'd feel safer dining outside while Urban respondents were the most likely to select "Neutral - I wouldn't feel safer either way."





# Next/Ongoing Updates

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





A group of hands holding light bulbs, symbolizing ideas and innovation.

**Webinar recording  
available on our website:**

[DestinationAnalysts.com/covid-webinars](https://DestinationAnalysts.com/covid-webinars)