



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**PRESENTATION OF FINDINGS
WEEK OF AUGUST 10TH, 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 and economic analysis.

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.

We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Resident + Stakeholder Research

Online Focus Groups

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info@destinationanalysts.com



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 22 data (fielded August 7-9) 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





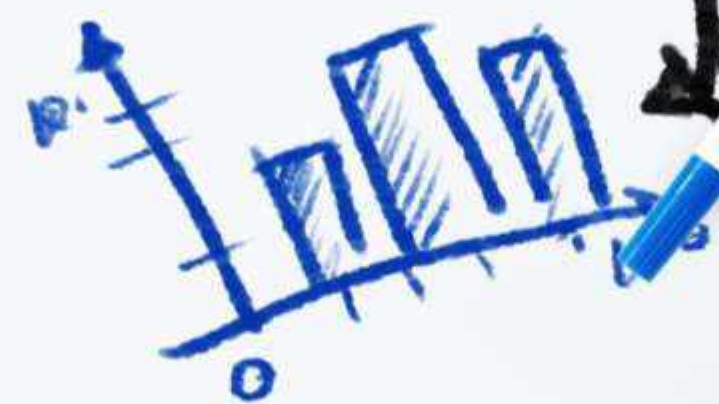
IMPORTANT

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.

Search

http://

Analysis



RESEARCH

Data



WWW.
test
customer





Cases in the U.S.

Updated August 8, 2020

Languages ▾

Print

TOTAL CASES
4,920,369

62,042 New Cases*

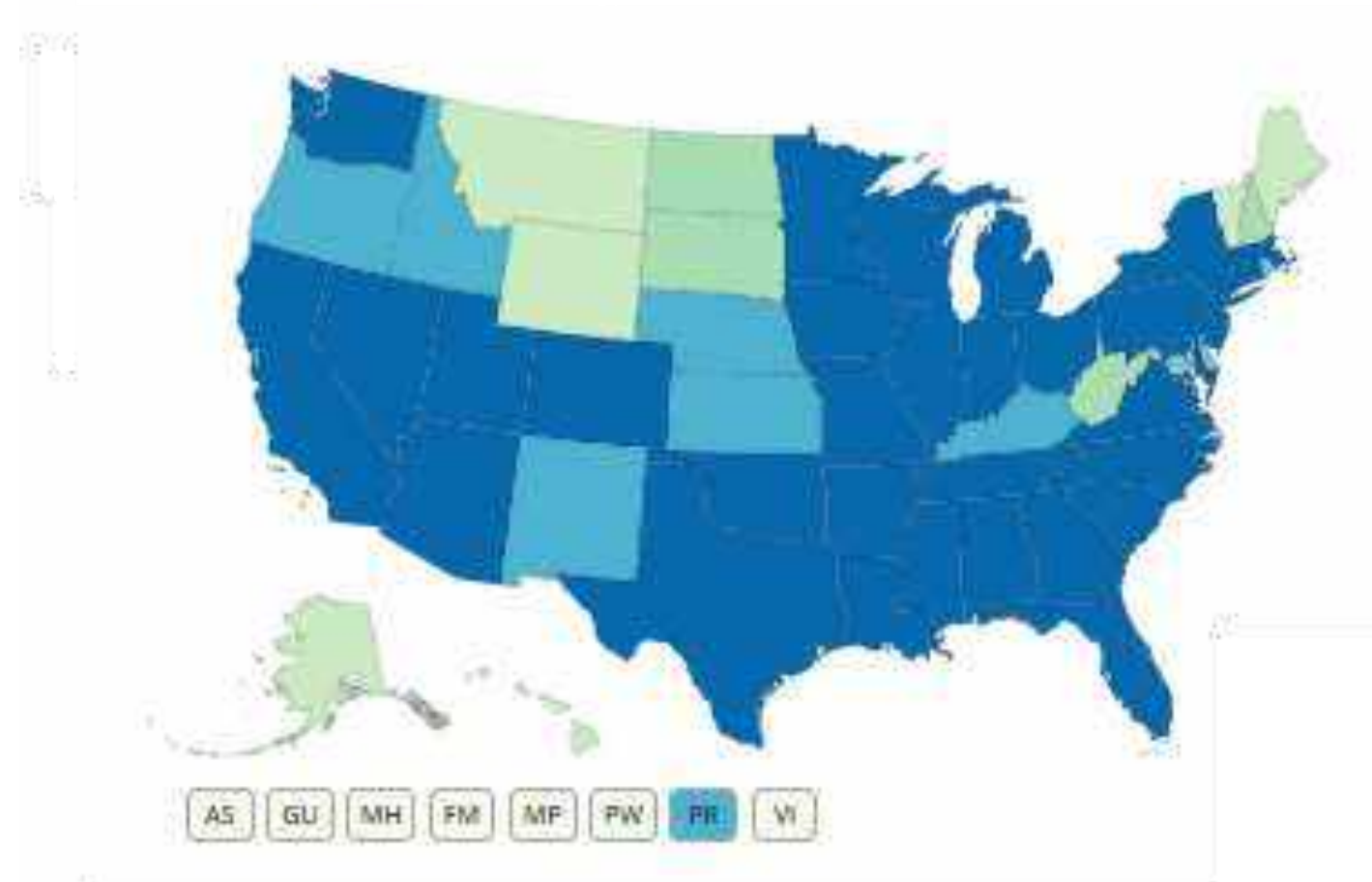
TOTAL DEATHS
160,220

1,340 New Deaths*

Compared to yesterday's data

[About the Data](#)

Cases by Jurisdiction



US State Department lifts global 'Do Not Travel' advisory



By Jennifer Hansler, CNN

Updated 4:41 PM ET, Thu August 6, 2020



(CNN) — After more than four months, the US State Department on Thursday lifted its advisory warning US citizens against traveling abroad.

The department [issued the Level 4: Do Not Travel advisory](#) -- the highest level of travel advisory -- on March 19, urging US citizens not to travel overseas due to the coronavirus pandemic.

However, "(w)ith health and safety conditions improving in some countries and potentially deteriorating in others, the Department is returning to our previous system of country-specific levels of travel advice (with Levels from 1-4 depending on country-specific conditions), in order to give travelers detailed and actionable information to make informed travel decisions," a Thursday note from the State Department said.

"This will also provide U.S. citizens more detailed information about the current status in each country," the note said. "We continue to recommend U.S. citizens exercise caution when traveling abroad due to the unpredictable nature of the pandemic."

CORONAVIRUS

Coronavirus USA: which states have kept travel restrictions and which have lifted them?

With a spike in new coronavirus cases in the U.S., many states have set travel restrictions while some have lifted them.

AS English

USA • Update: 09/08/2020 02:17



YANNIS KOLESIDIS / EFE

The U.S. states are making [new rules for travelers](#) as there has been a spike in new coronavirus cases for several weeks since the reopening of the economy back in May. All of the Northeast and most of the mid-Atlantic states have implemented statewide travel restrictions -- a total of 33 states.

NY, NJ and Connecticut have toughest restrictions.

Since New York, New Jersey and Connecticut were the epicenter of the coronavirus pandemic for several months, they are the states with the toughest travel restrictions. As of 4 August, any traveler from the 34 states currently on the advisory list must self-quarantine for 14 days.

States that have a new positive test rate higher than 10 per 100,000 residents, or a 10 percent or higher positivity rate over seven-day rolling average are, are included on the list. Based upon New York Governor Andrew Cuomo's Executive Order 205, issued June 25, 2020, the following states and territories meet the criteria for required quarantine:

- Alaska
- Alabama
- Arkansas
- Arizona
- California
- Florida
- Georgia
- Iowa
- Idaho
- Illinois
- Indiana
- Kansas
- Kentucky
- Louisiana
- Maryland
- Minnesota
- Missouri
- Mississippi
- Montana
- North Carolina
- North Dakota
- Nebraska
- New Mexico
- Nevada
- Ohio
- Oklahoma
- Puerto Rico
- Rhode Island
- South Carolina
- Tennessee
- Texas
- Utah
- Virginia
- Washington
- Wisconsin

Strength

Love

Security

What Do We Most Want?

Happiness

Money

Serenity



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

- Essential priority
- High priority
- Medium priority
- Low priority
- Not a priority



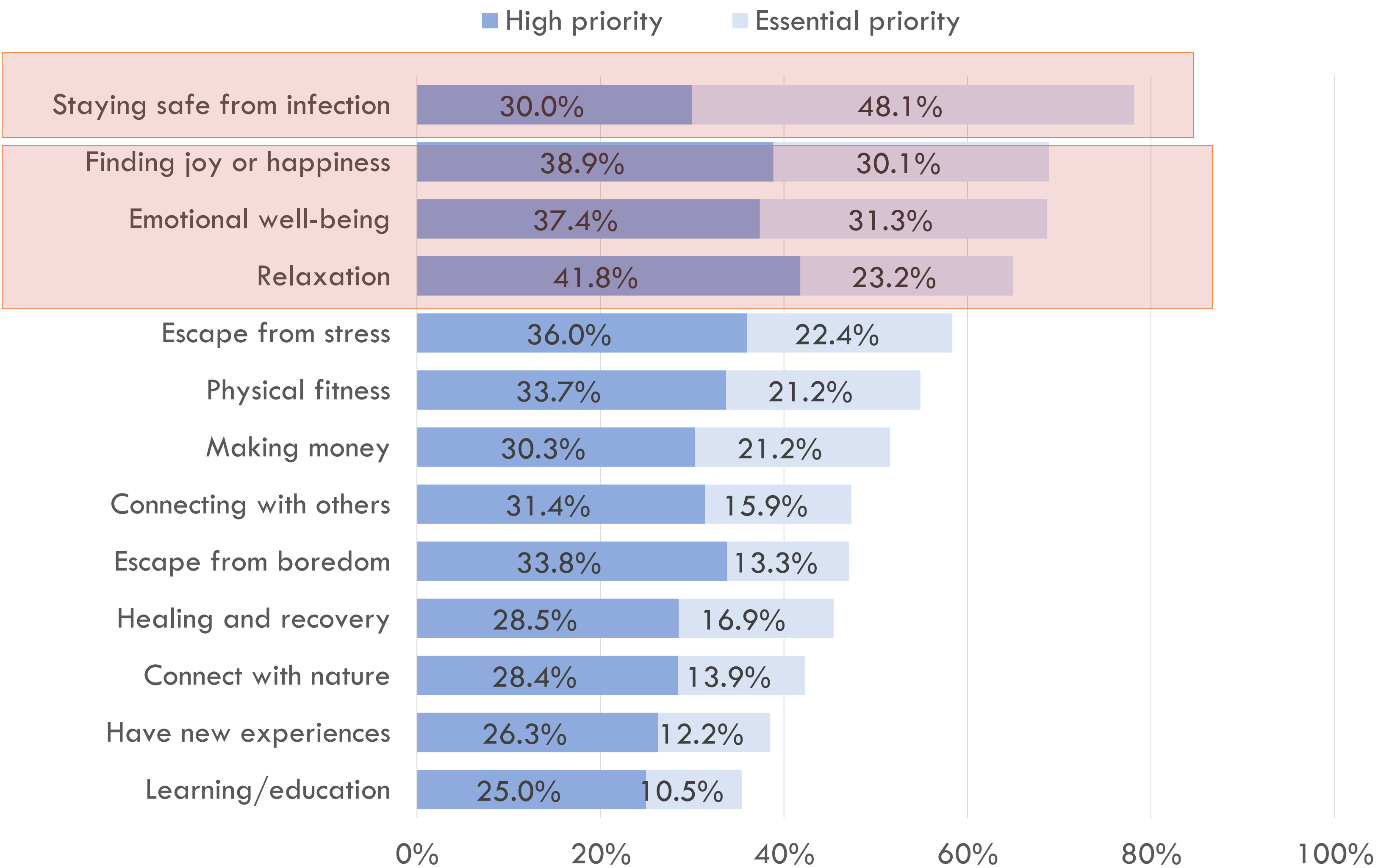
Has the Ongoing Pandemic Changed Our Priorities?



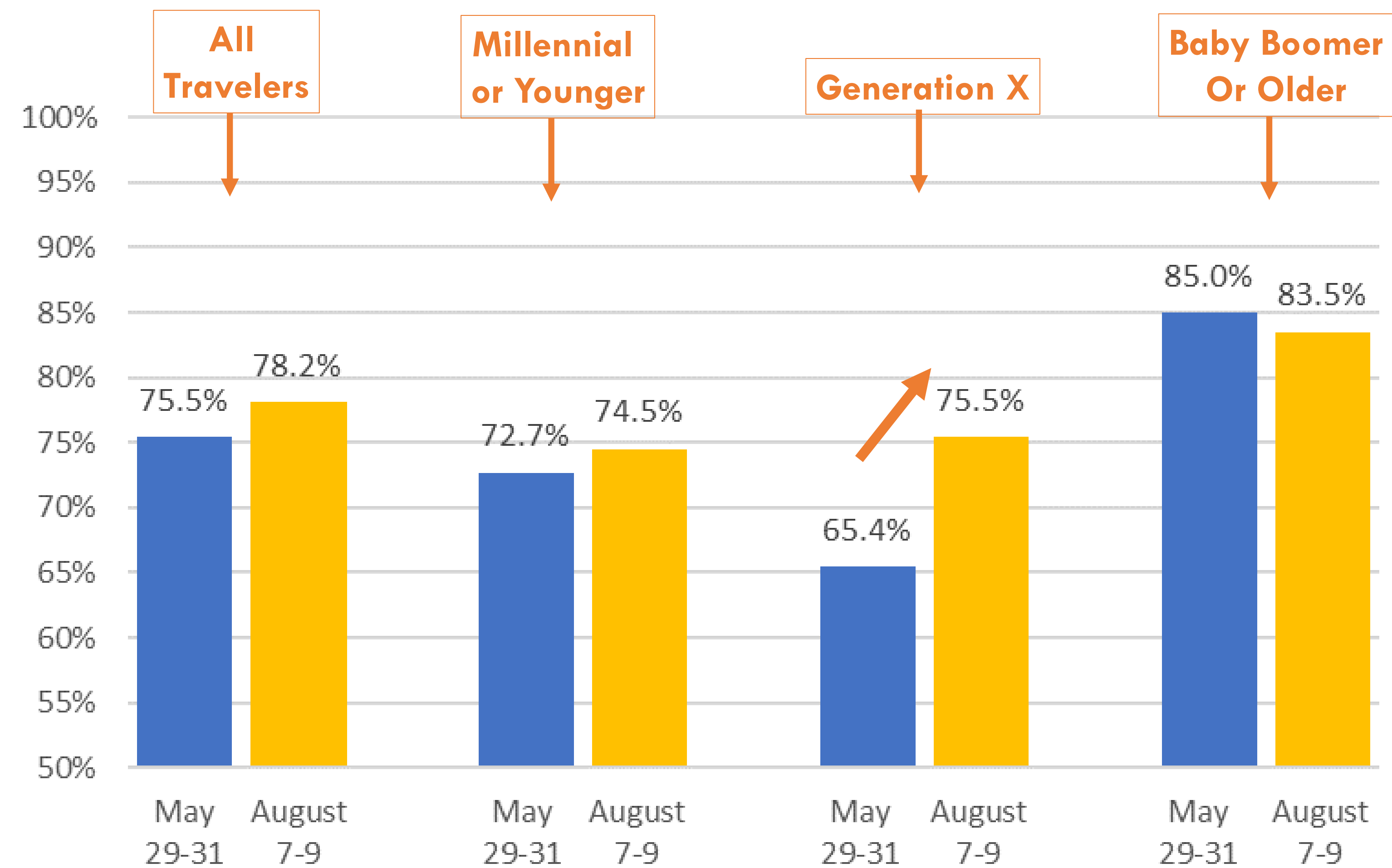
Lifestyle Priorities

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

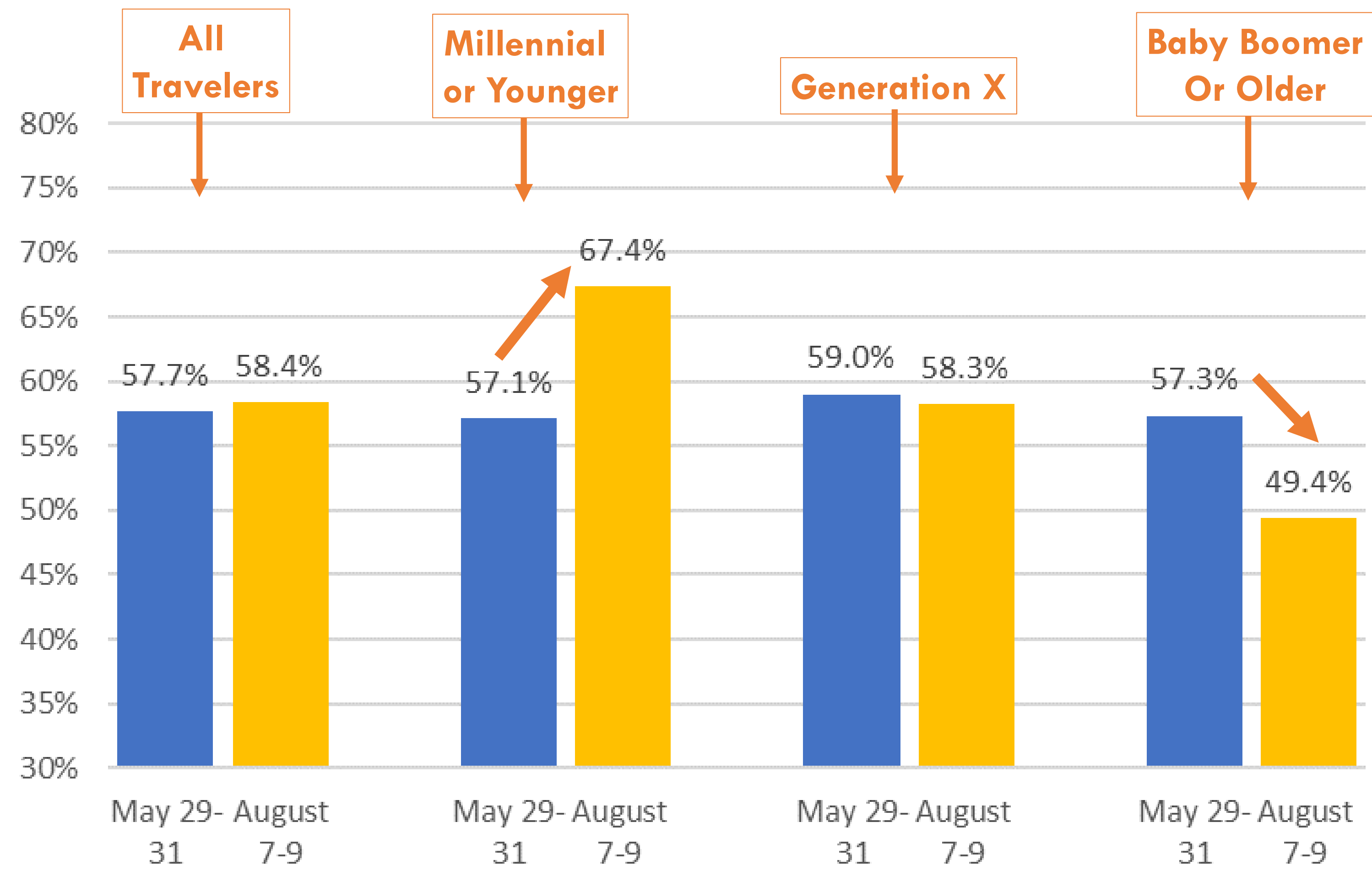
(Base: Wave 22. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)



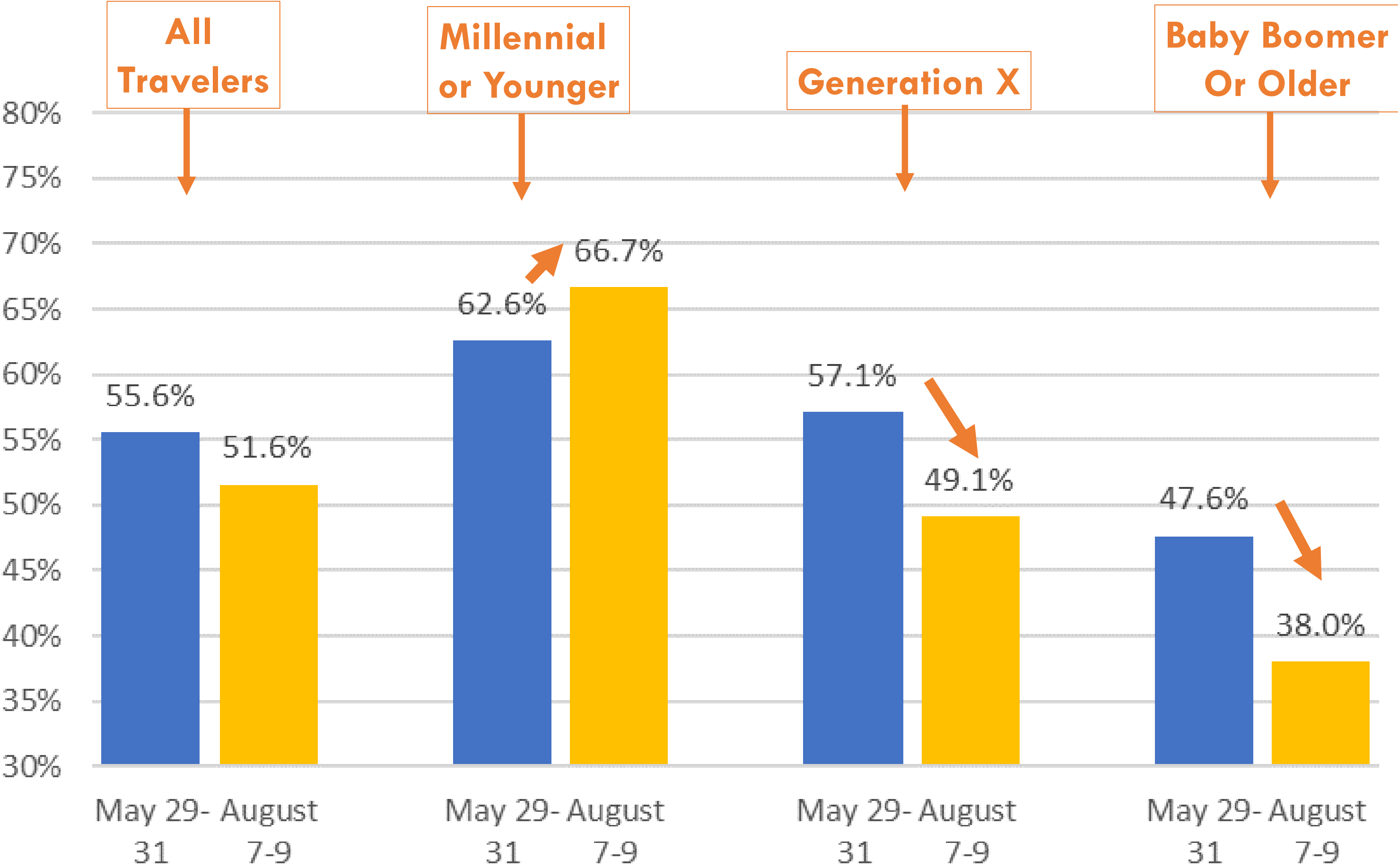
Lifestyle Priorities: Staying Safe from Infection



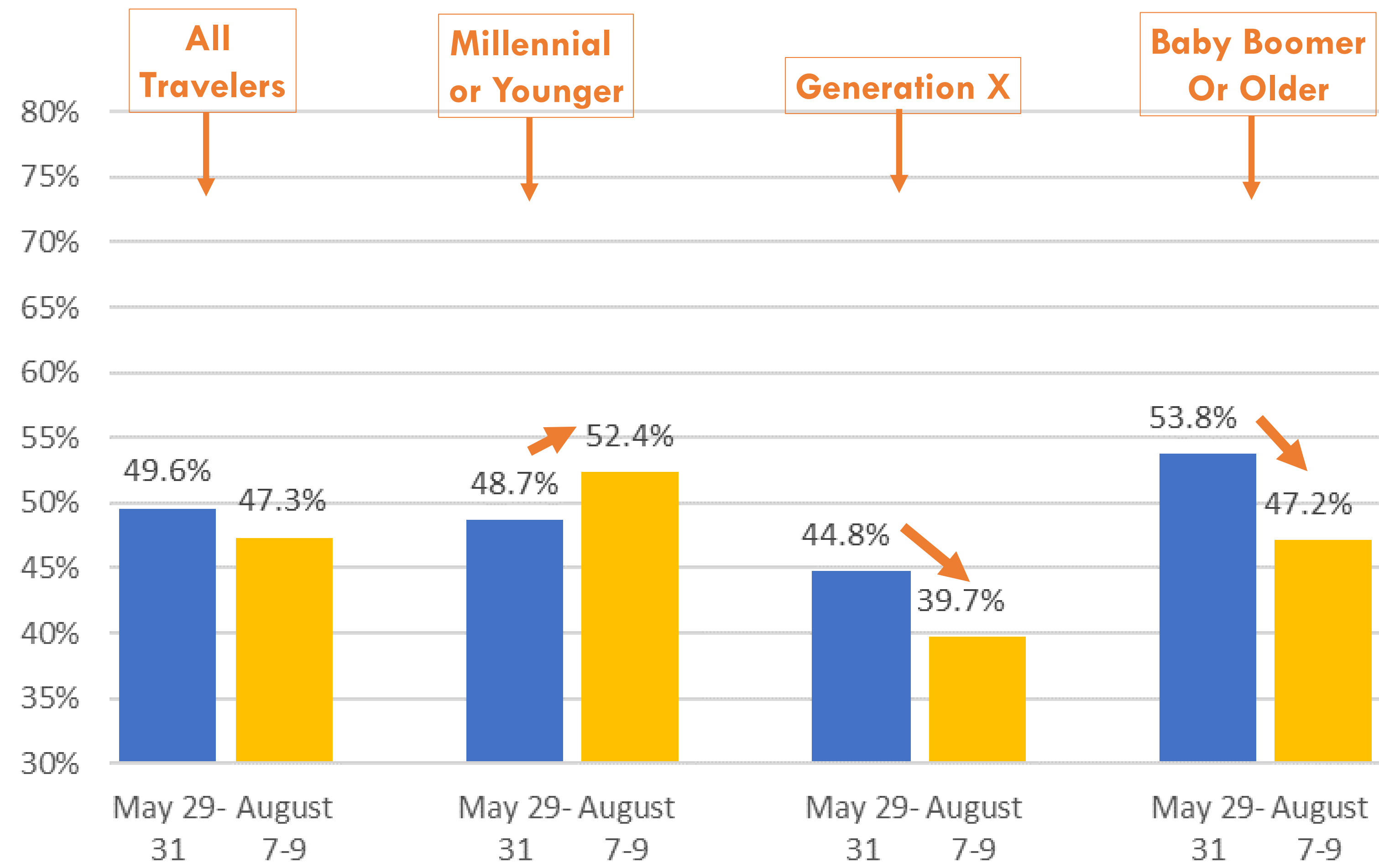
Lifestyle Priorities: Escape from Stress



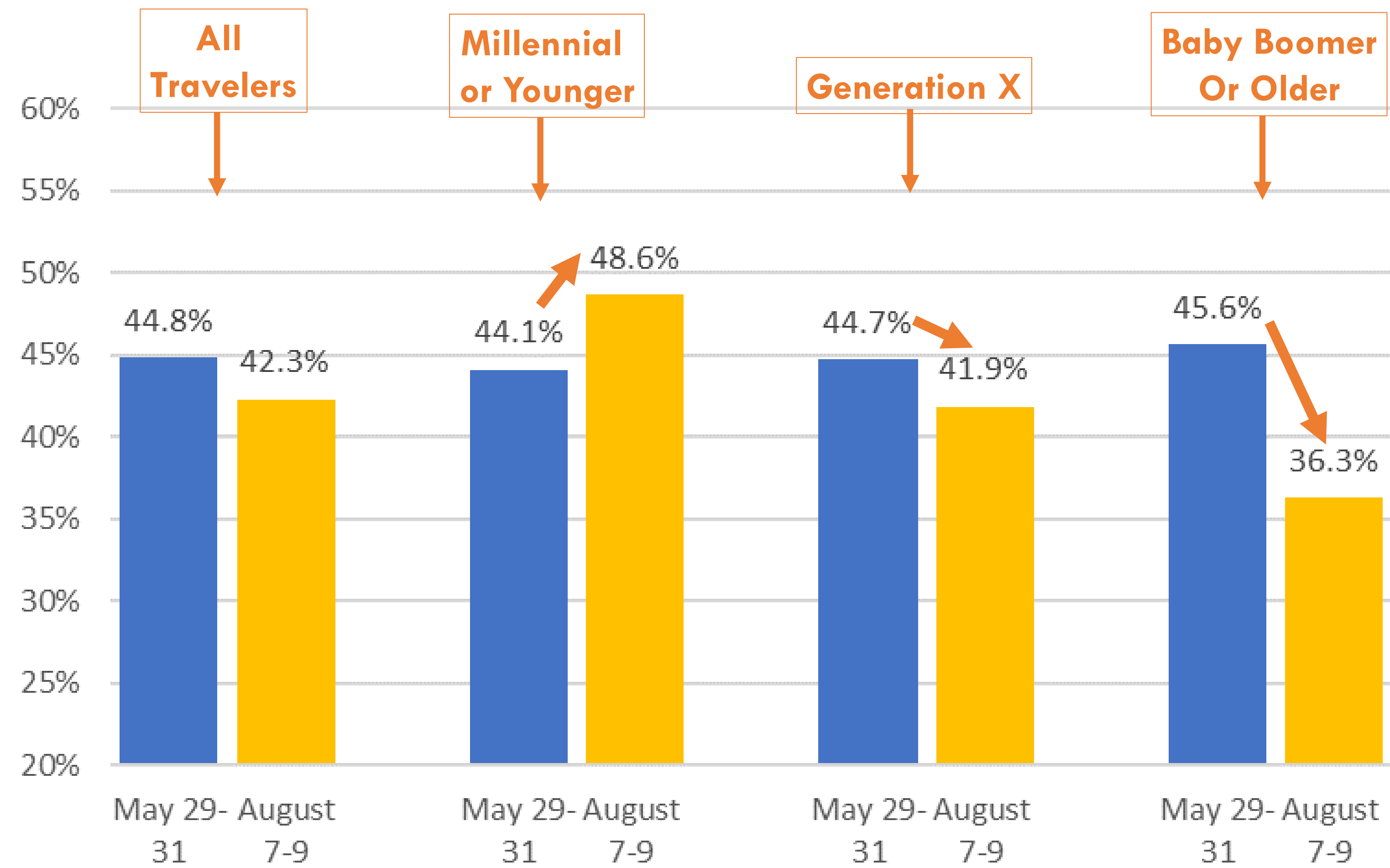
Lifestyle Priorities: Make Money



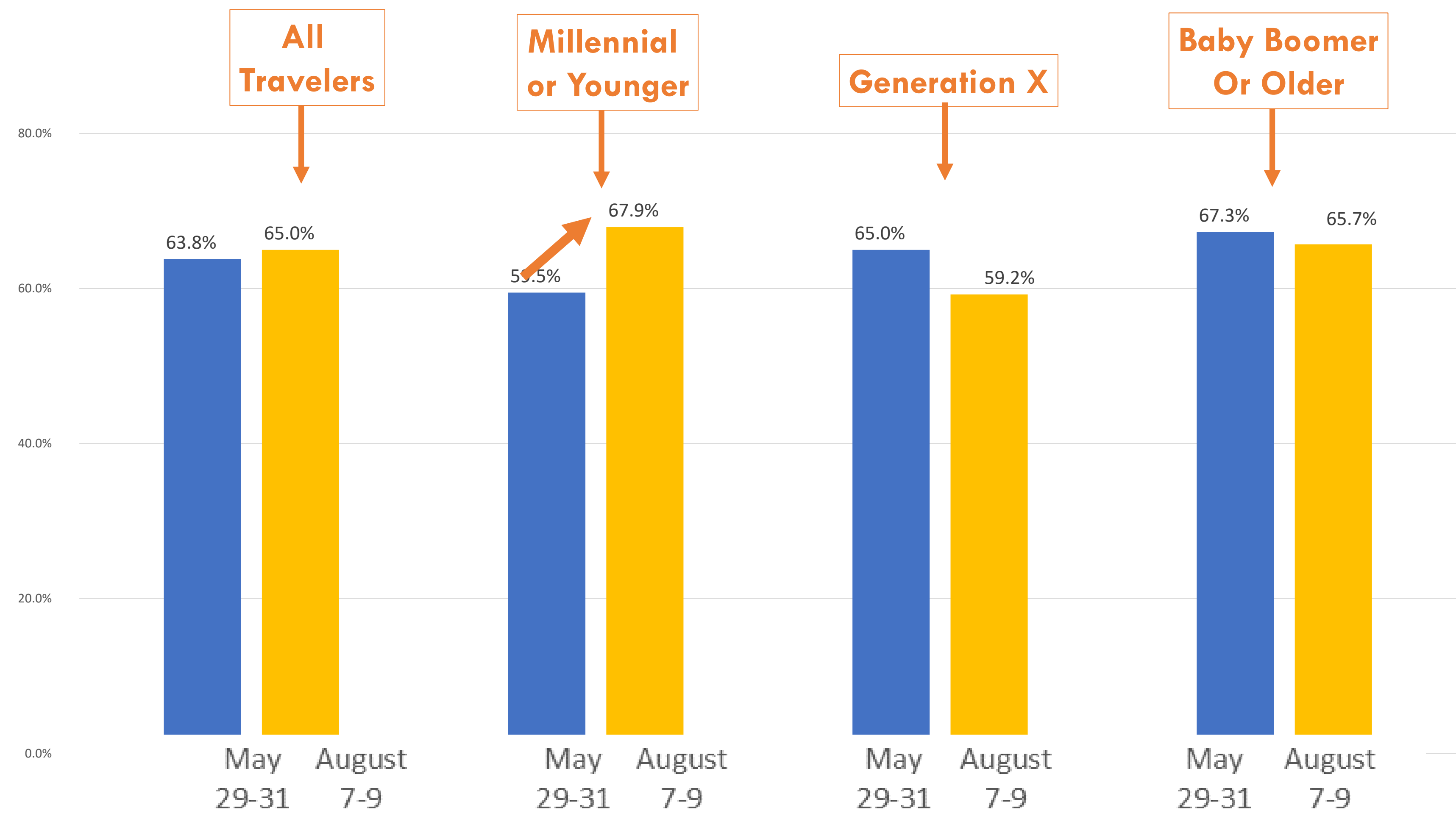
Lifestyle Priorities: Connecting with Others



Lifestyle Priorities: Connecting with Nature



Lifestyle Priorities: Relaxation



Key Takeaways

- Americans of all ages continue to say staying safe from infection is their top lifestyle priority over the next six months
- Compared to two months ago, younger travelers are now further prioritizing many psycho-emotional needs like escaping stress and relaxation, while Baby Boomers are placing less emphasis on these



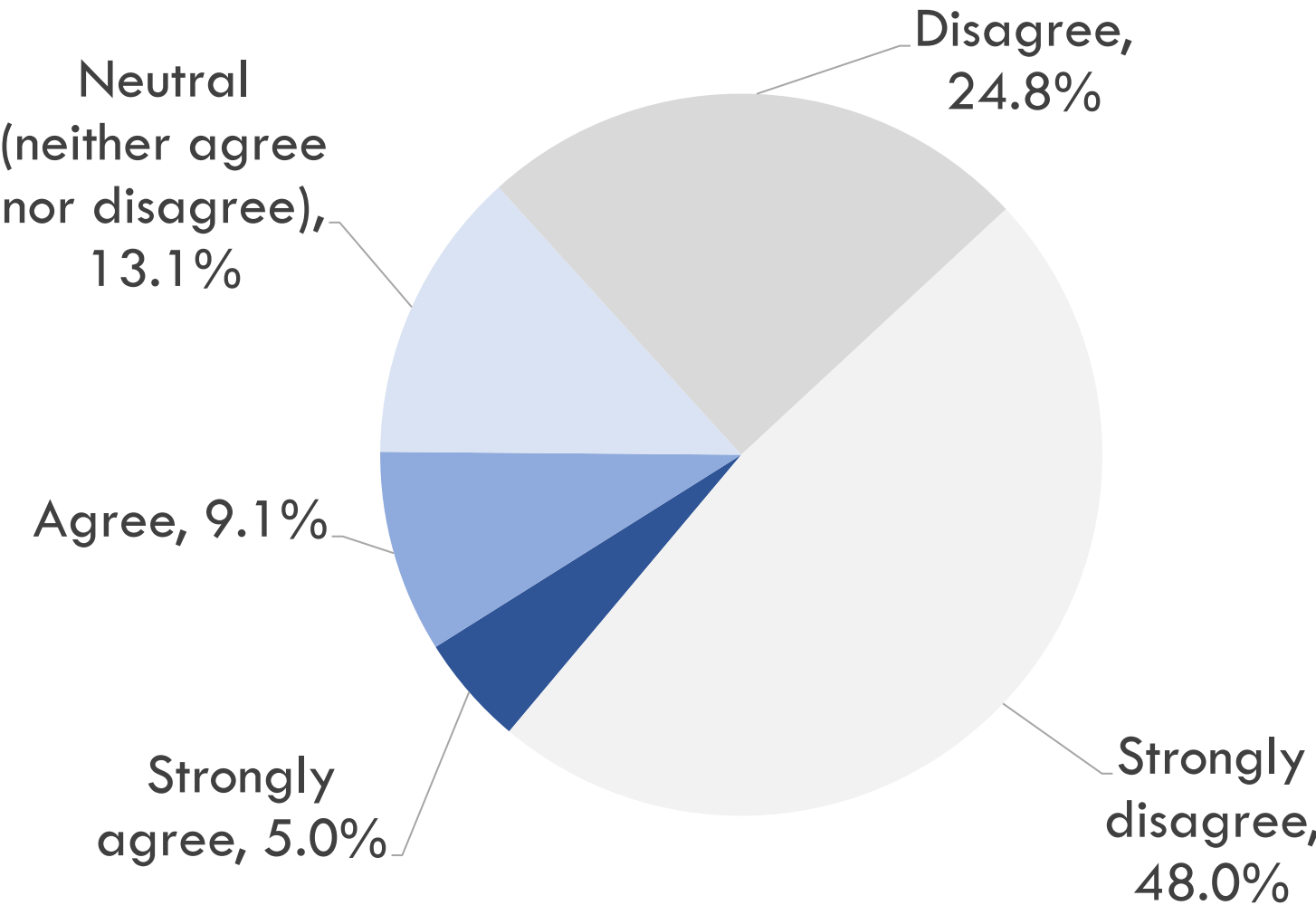
A collection of travel items including a blue suitcase, a blue face mask, a small bottle of hand sanitizer, a straw hat, sunglasses, a blue shirt, a blue jacket, a blue bag, and a blue bag, all laid out on a light-colored, textured surface. The text "How Americans Feel About Travel" is overlaid in the center.

How Americans Feel About Travel

Expectations for Resolution by Fall

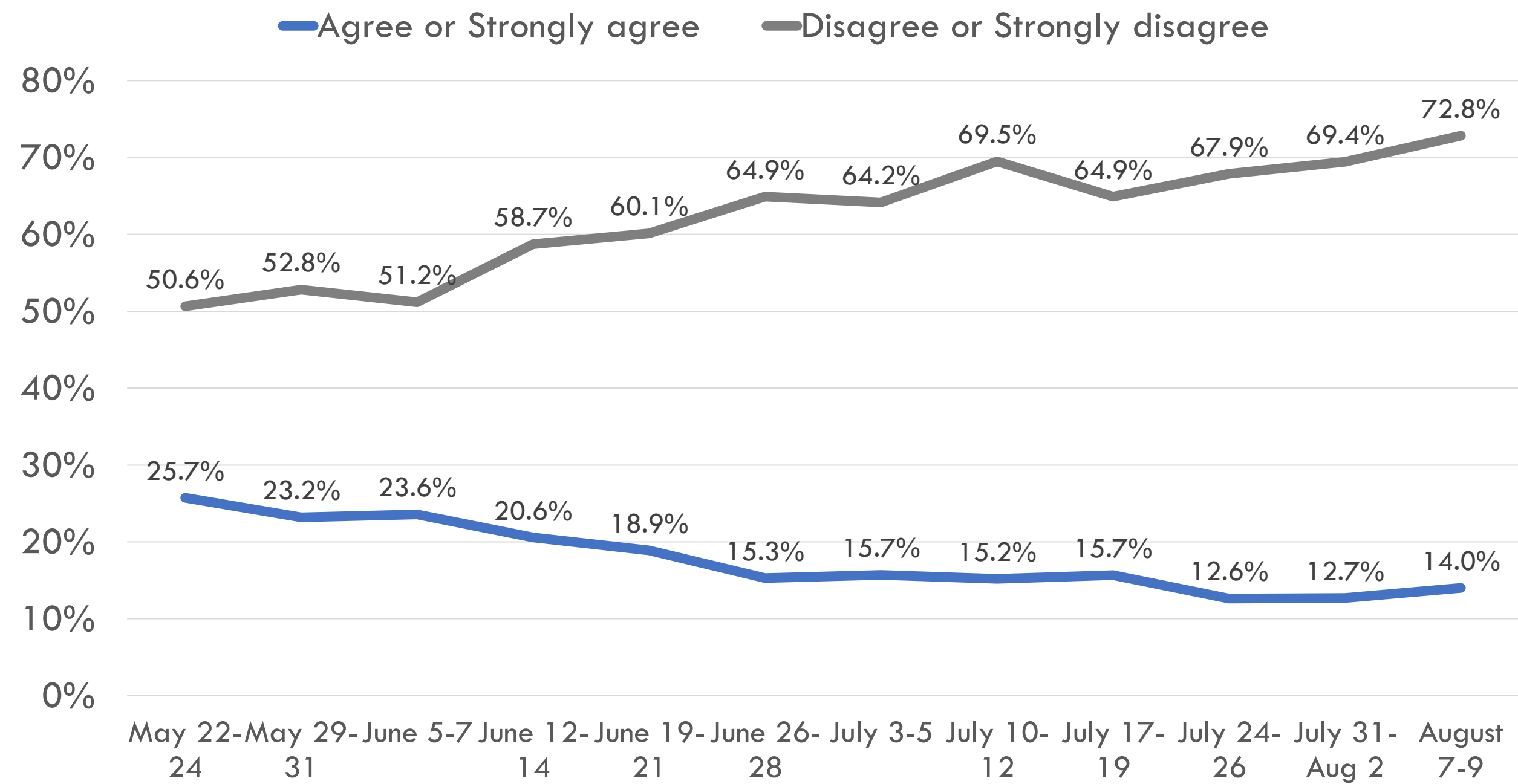
How much do you agree with the following statement?

Statement: I expect the coronavirus situation will be resolved before Fall begins.



(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

Historical data

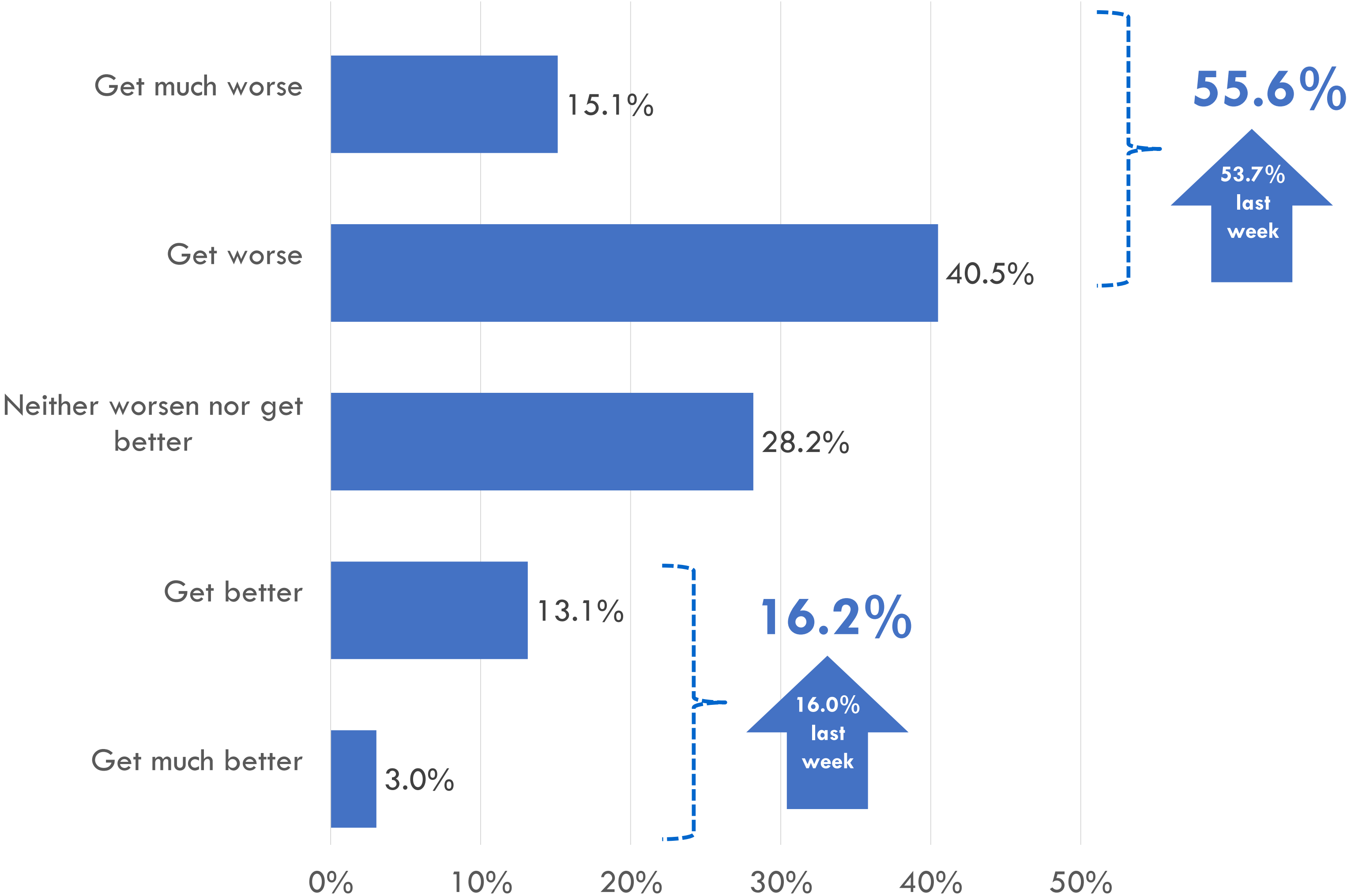


Expectations for the Coronavirus Outbreak

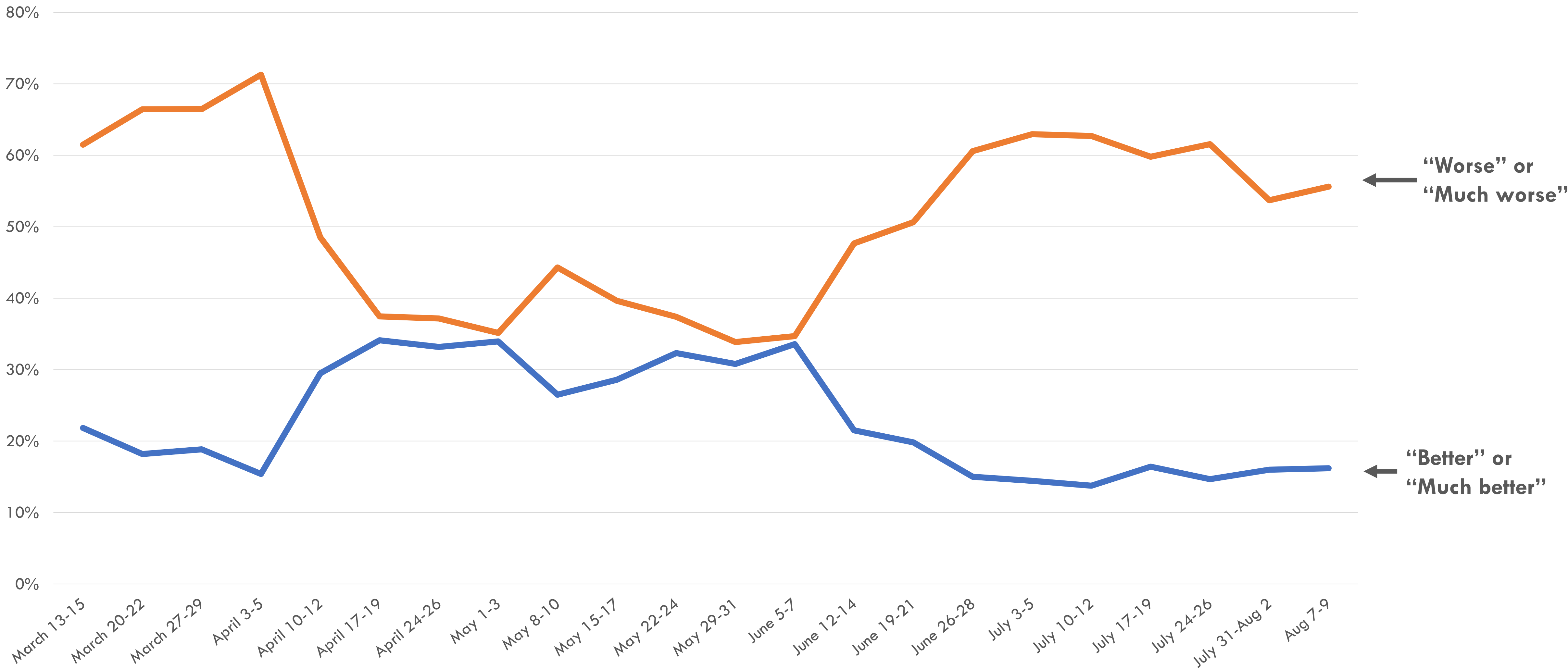
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



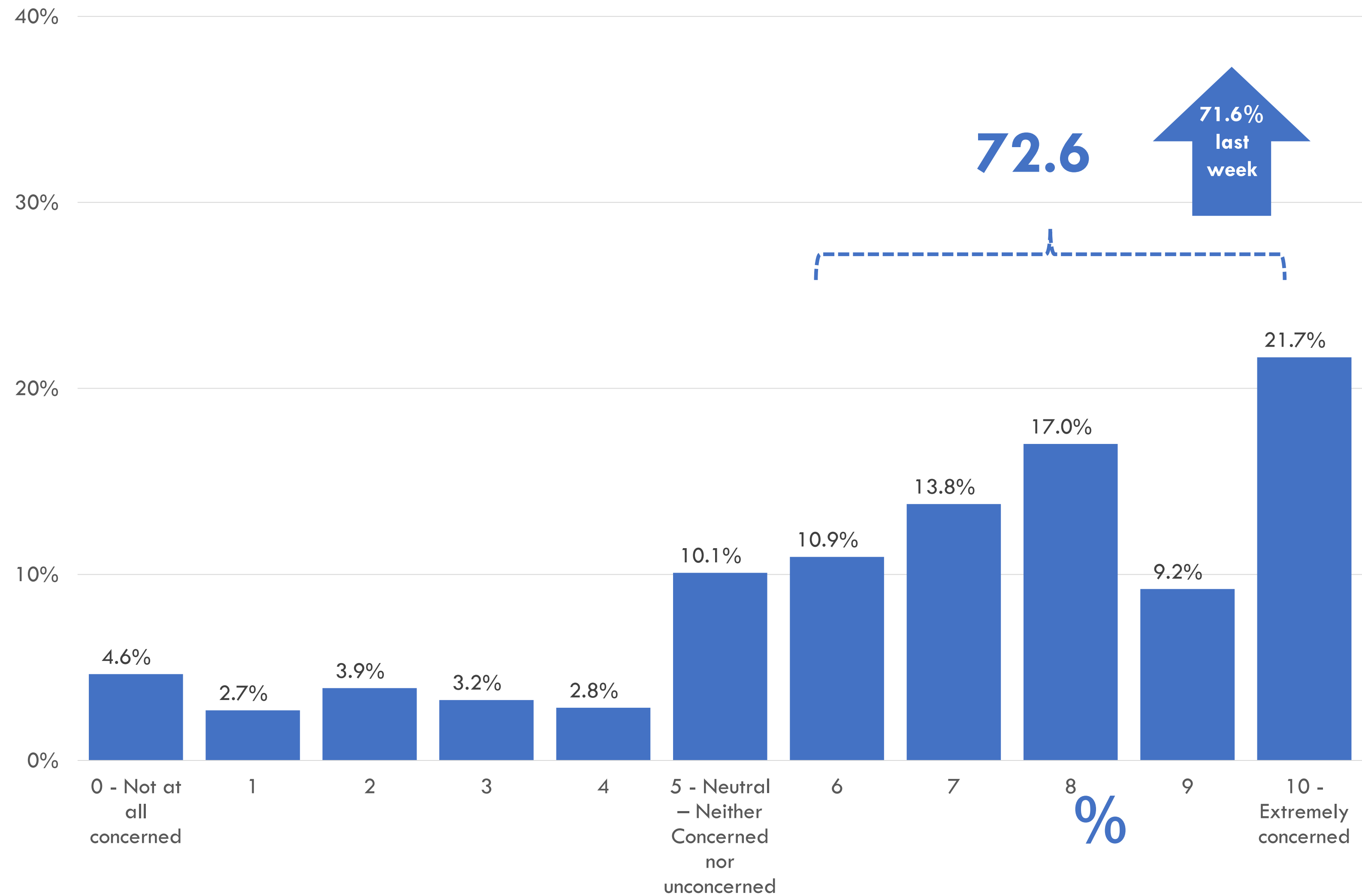
Expectations for the Coronavirus Outbreak



Personal Health Concerns

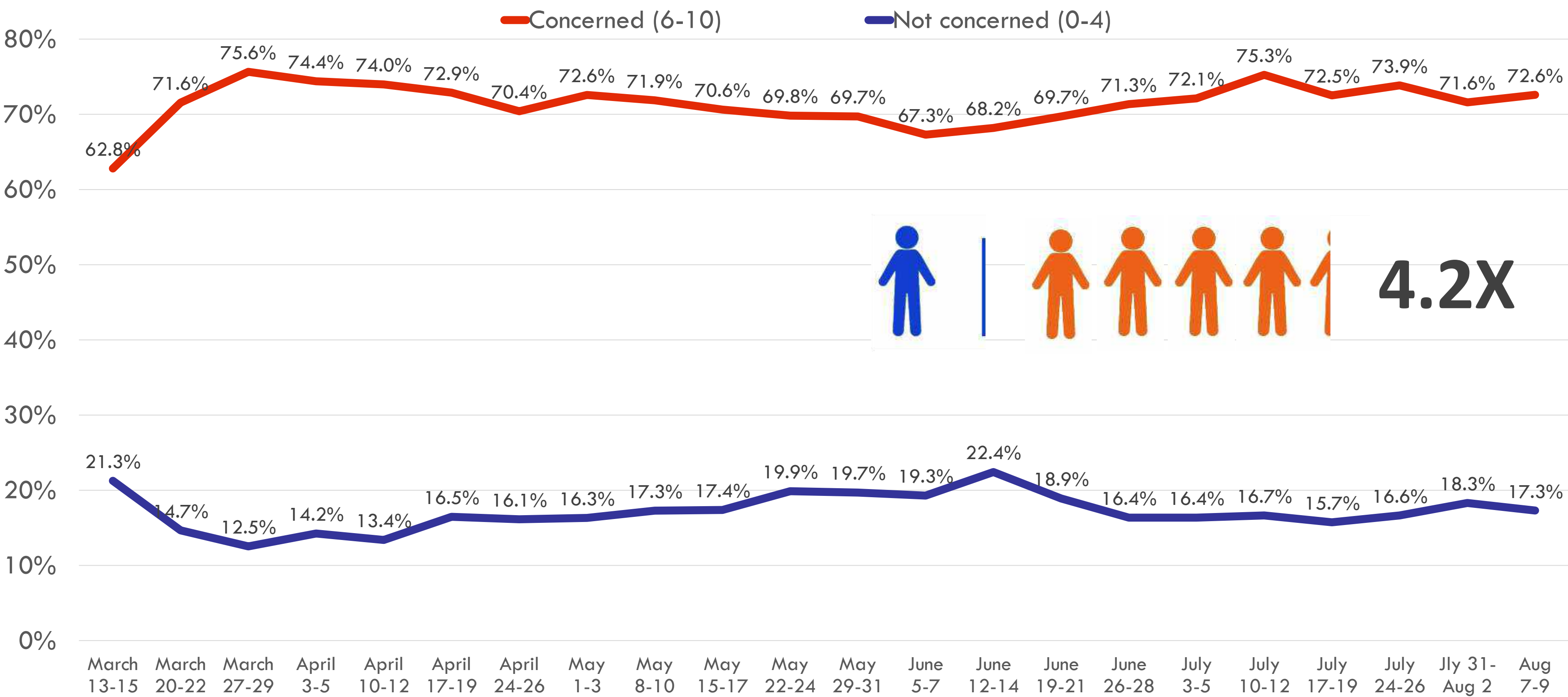
Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



Personal Health Concerns

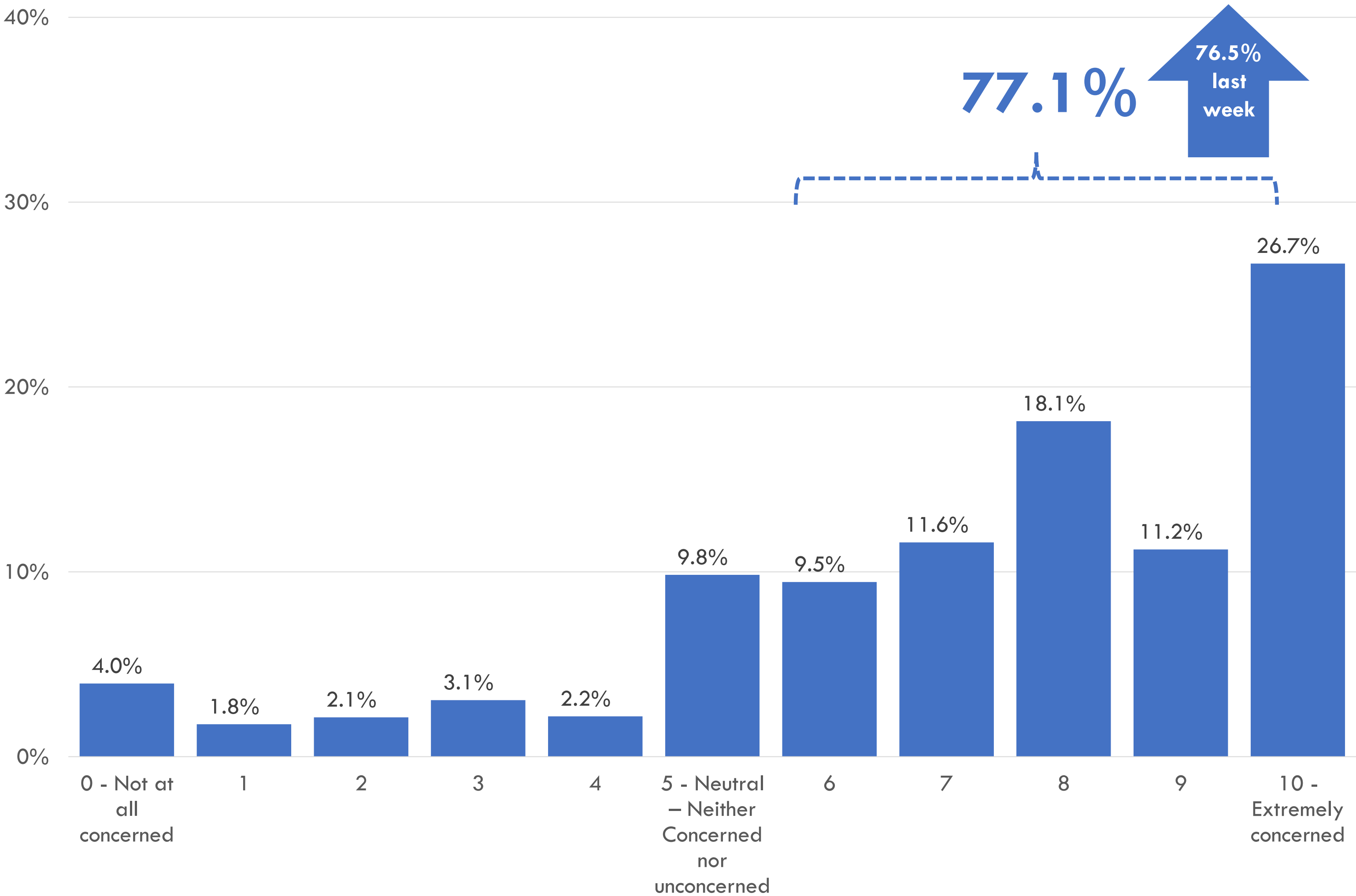
Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)



Health Concerns (Family & Friends)

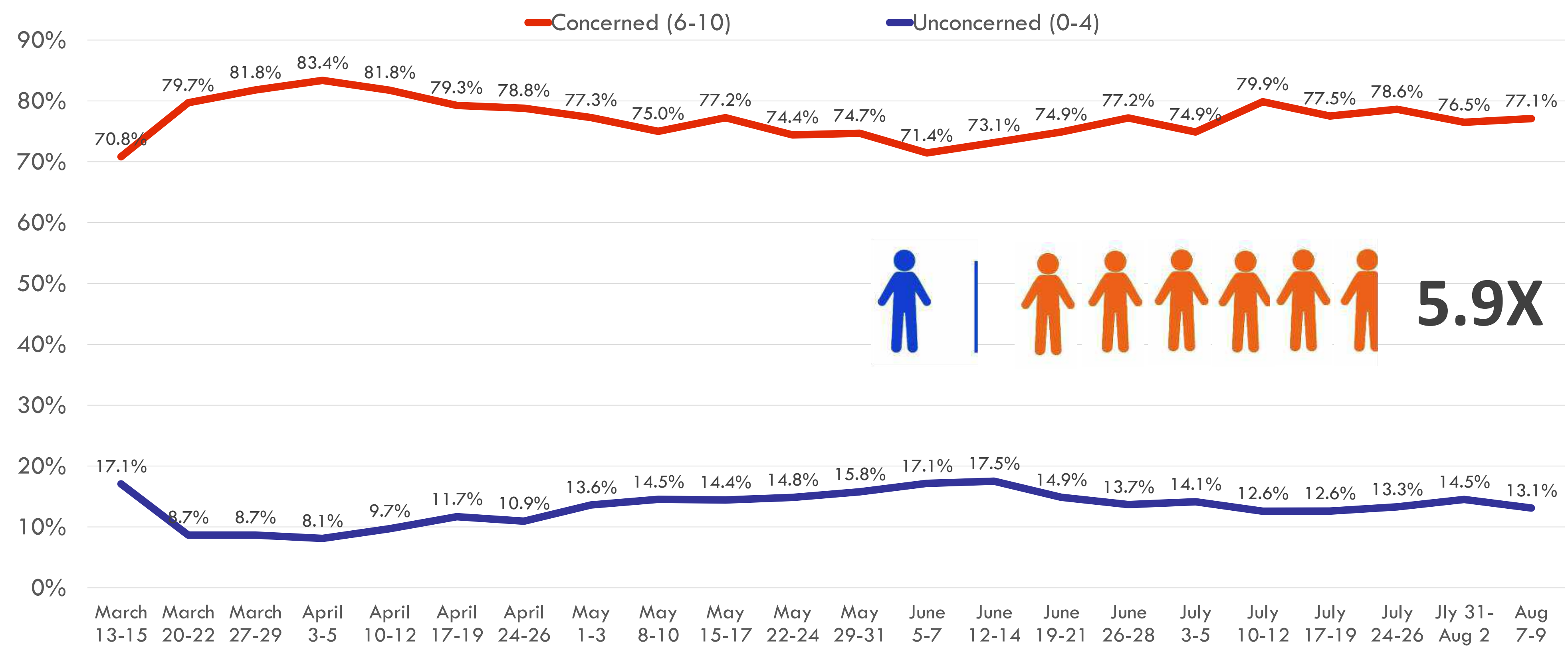
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your **FRIENDS OR FAMILY** contracting the virus? (Please answer using the scale below)

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



Health Concerns (Family & Friends)

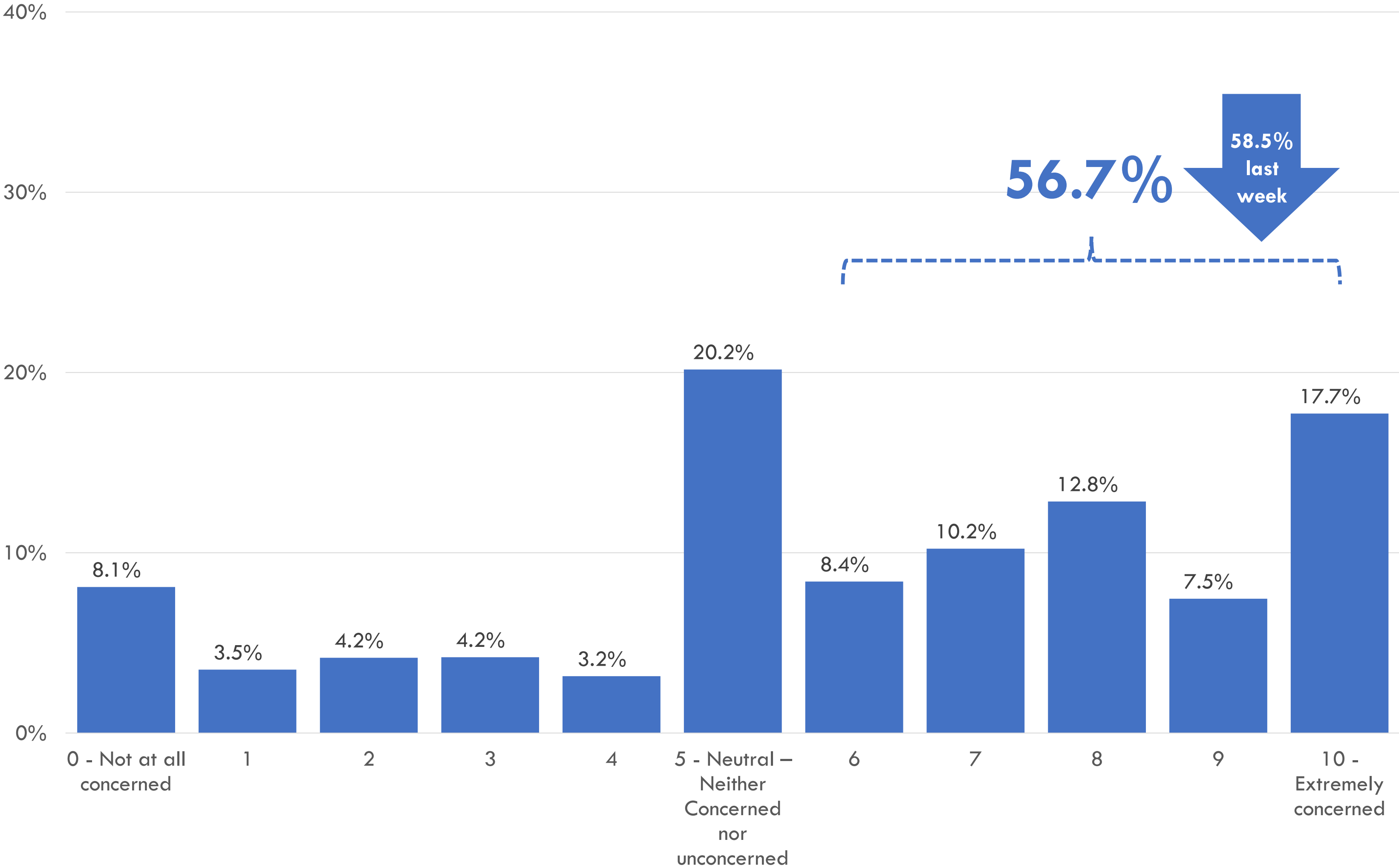
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)



Concerns About Personal Finances

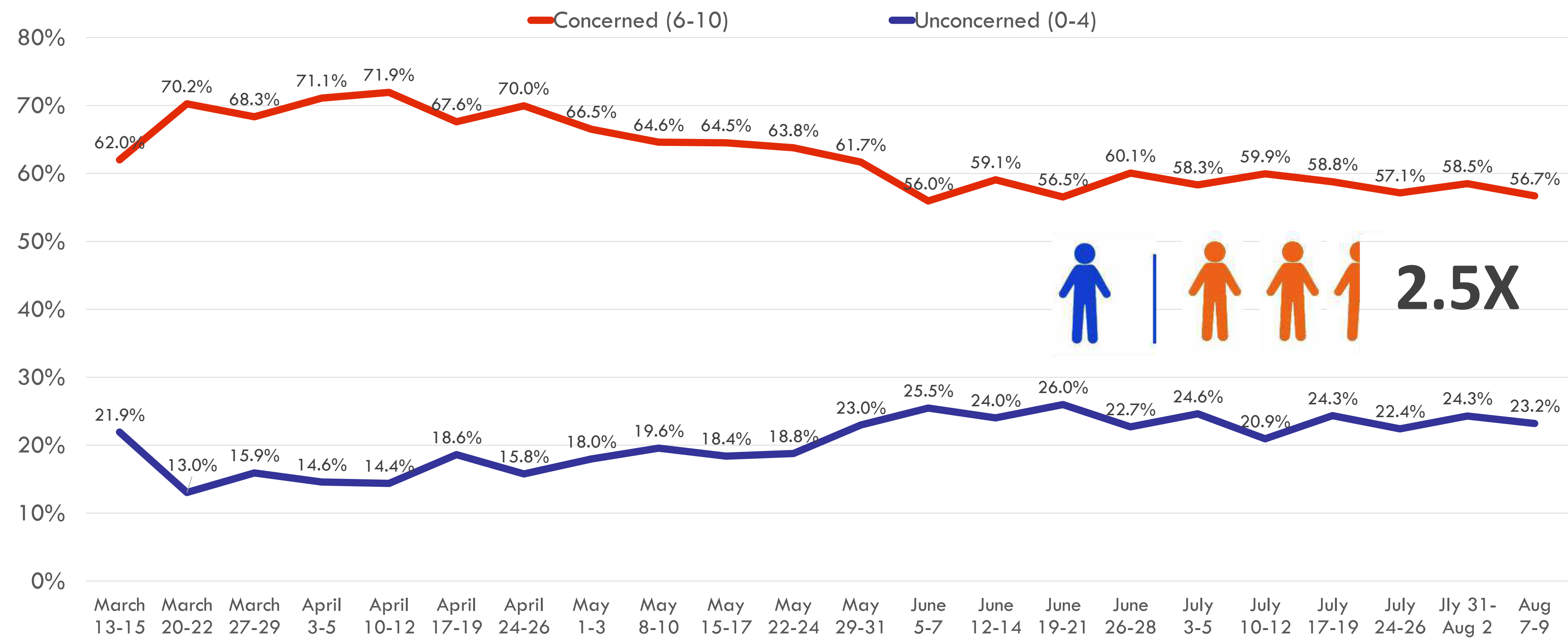
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



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)

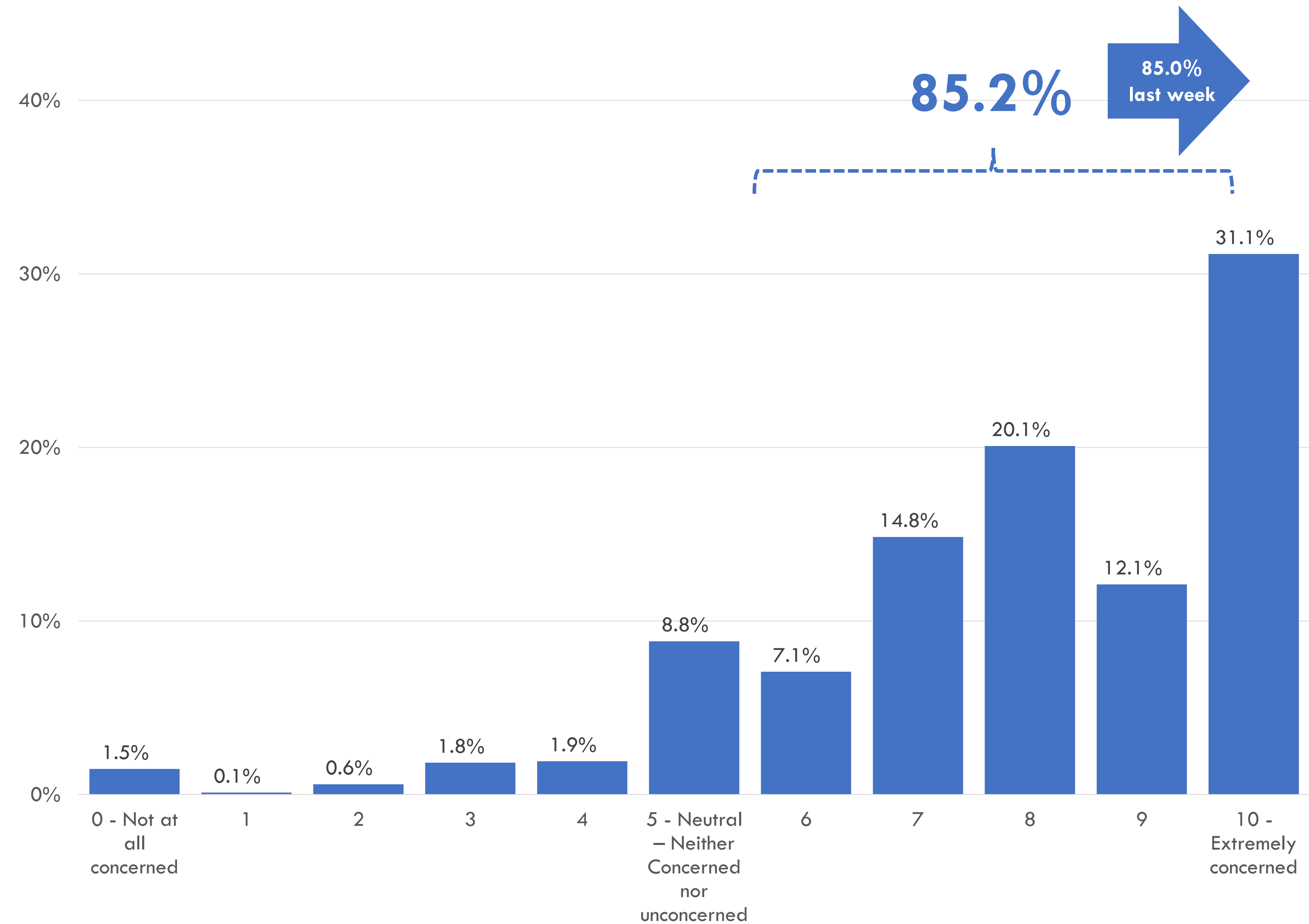


(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)

Concerns About National Economy

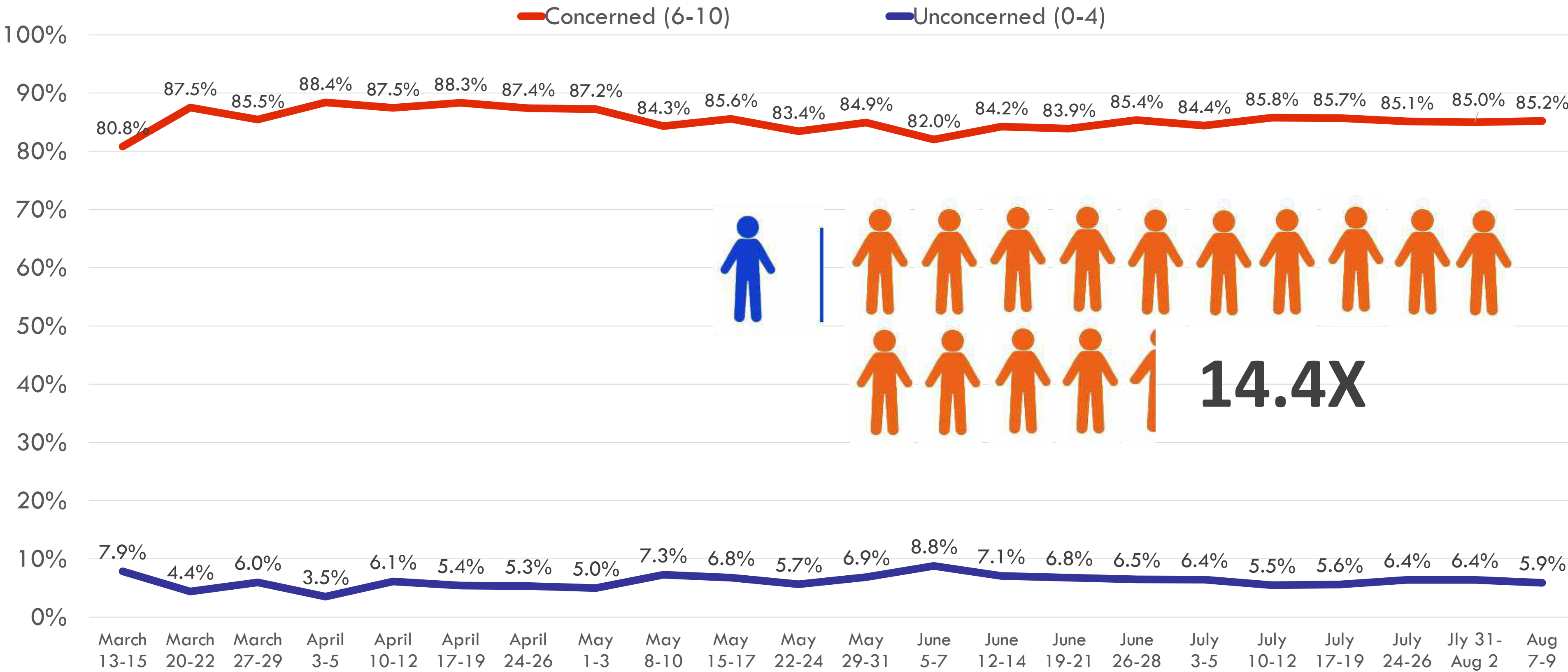
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



Concerns About National Economy

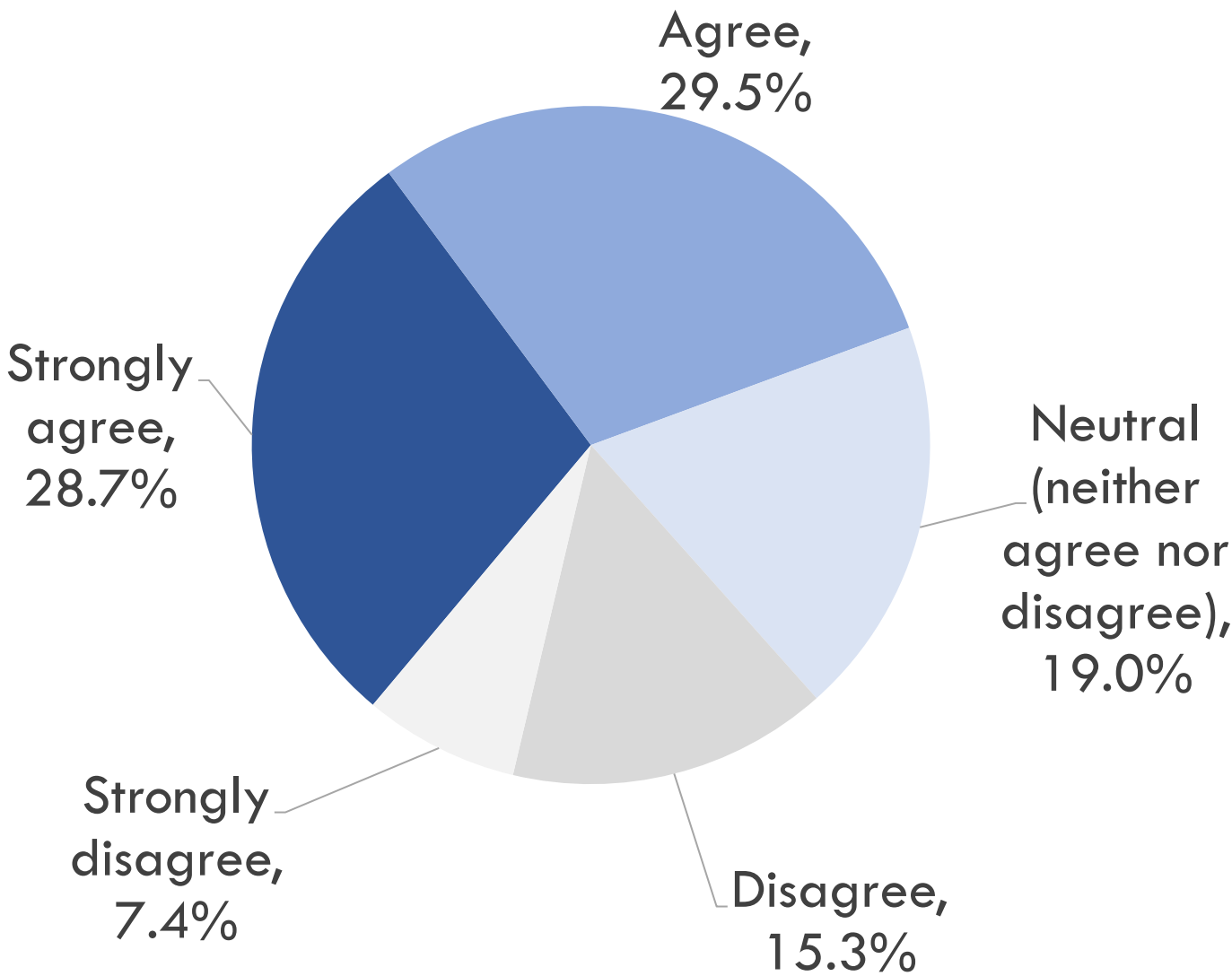
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?



Avoiding Travel Until the Crisis Blows Over

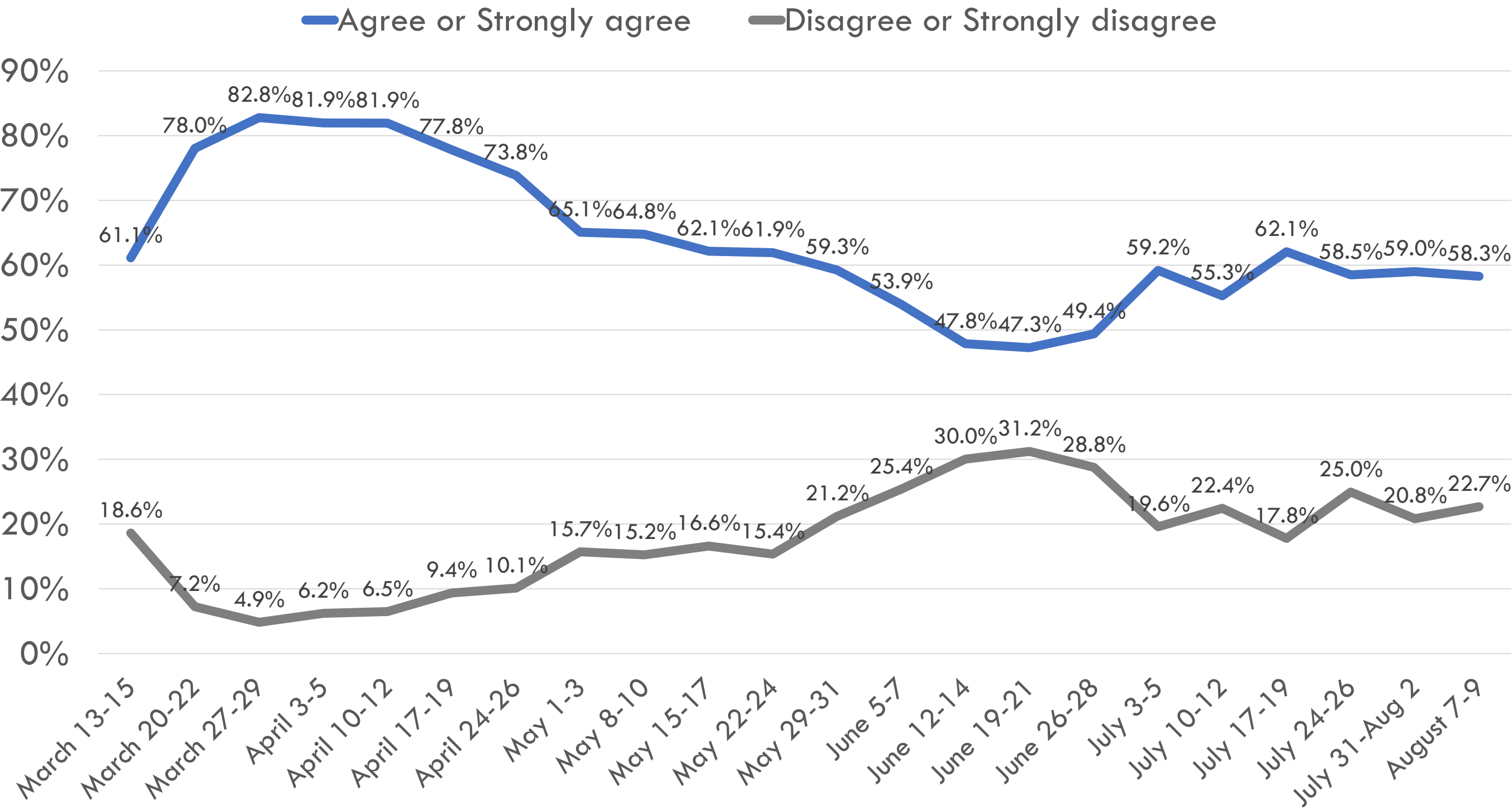
How much do you agree with the following statement?

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



(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, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

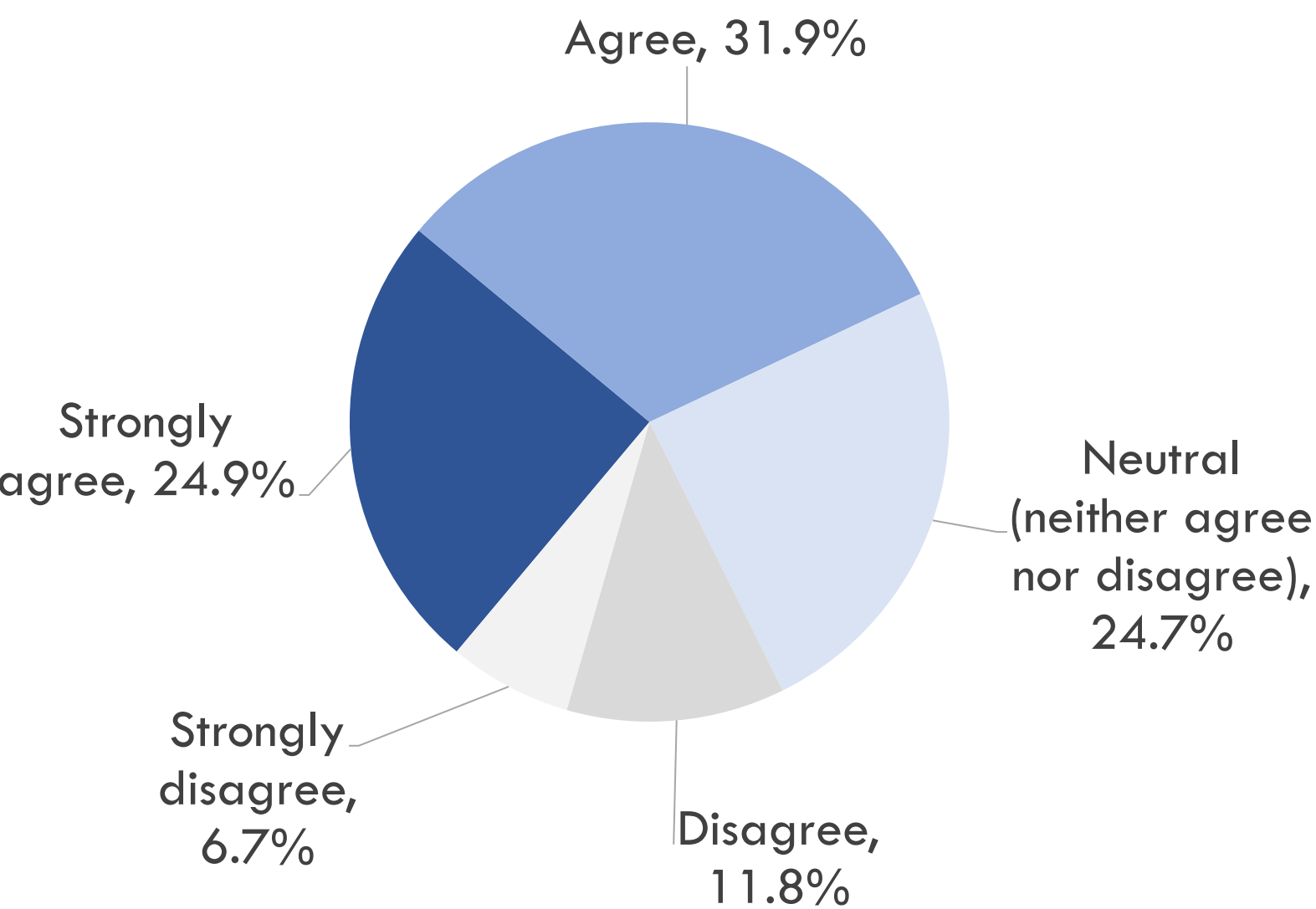
Historical data



Staycations as a Replacement for Vacations

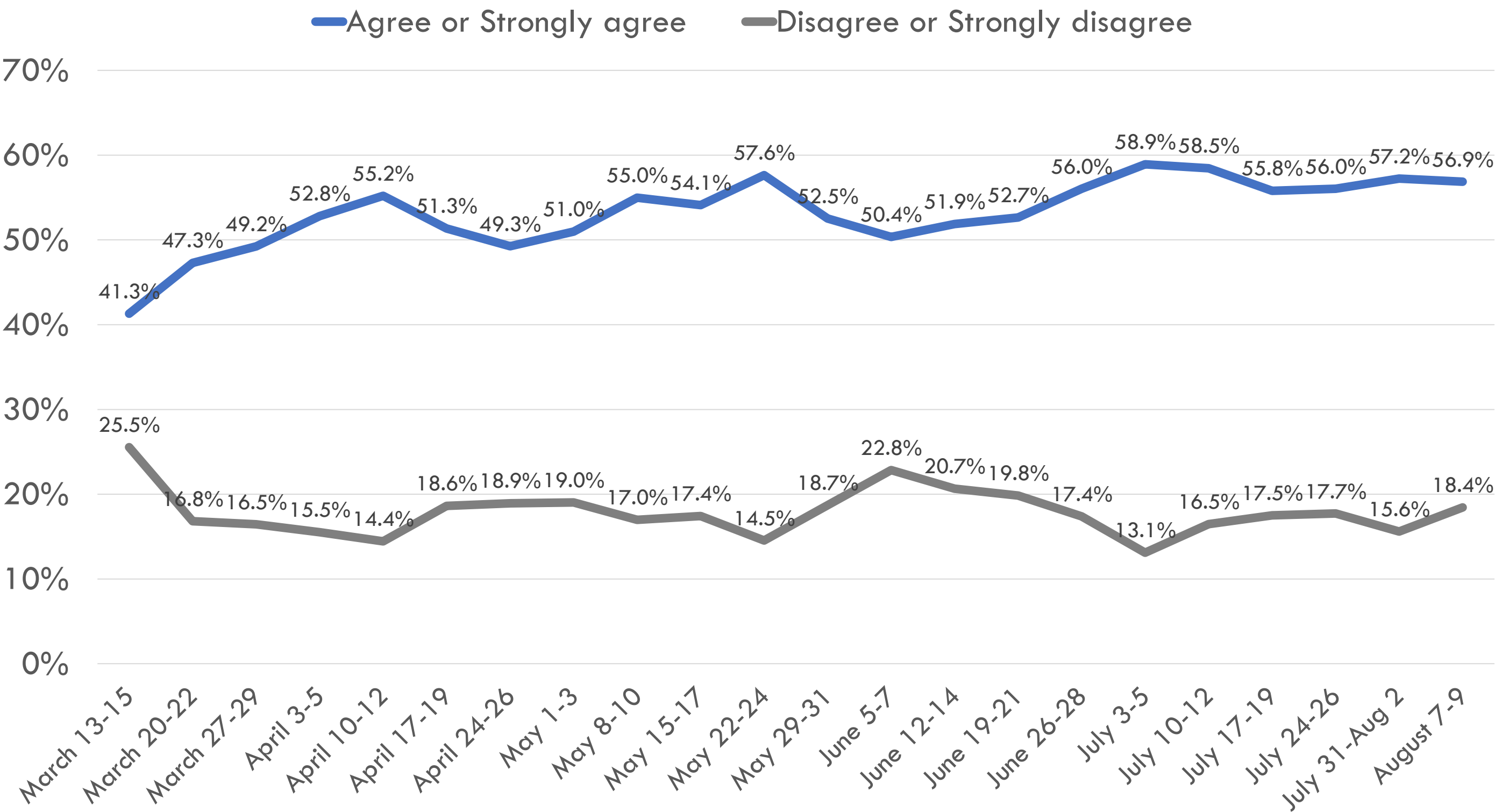
How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).



(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, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

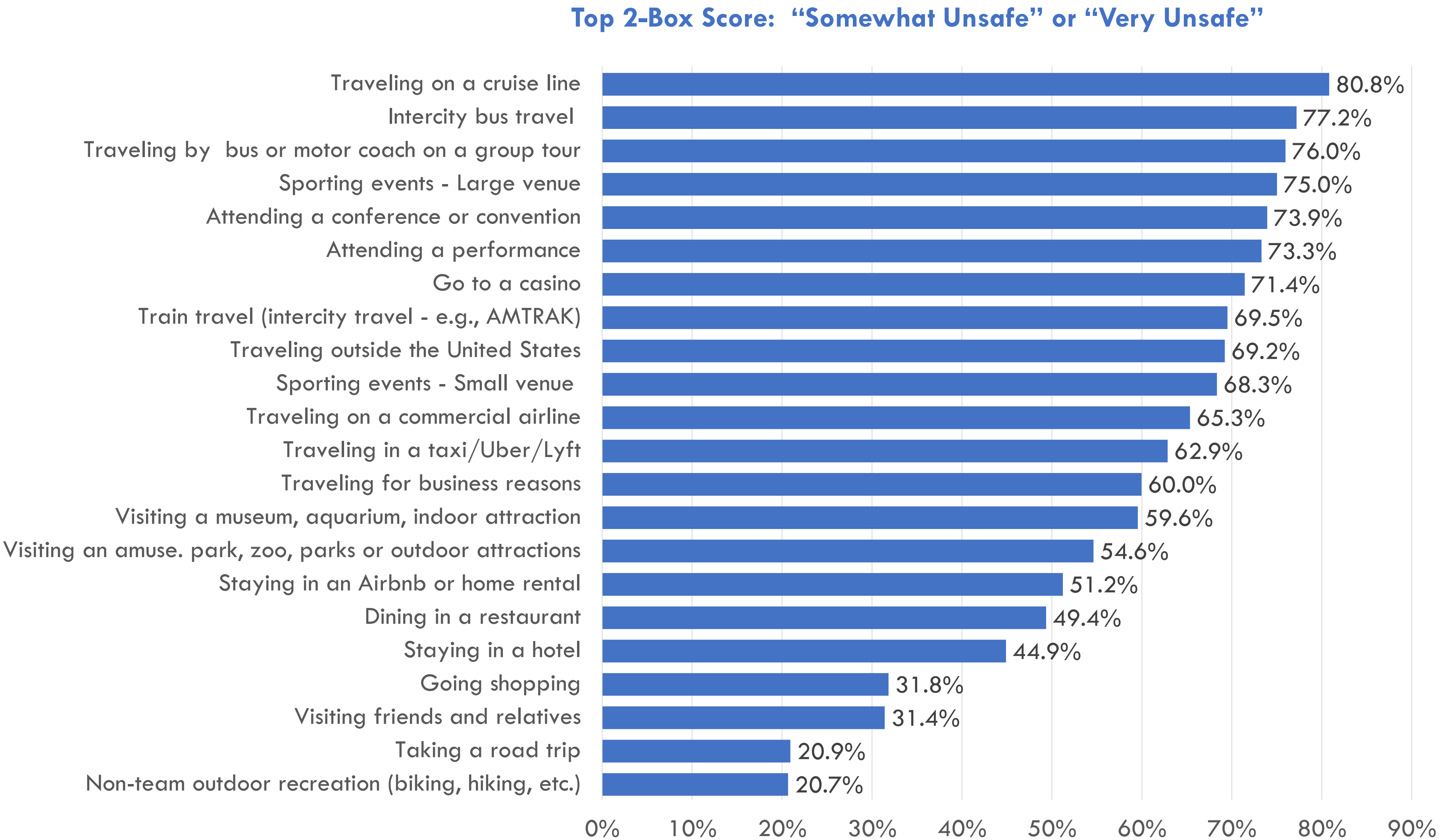
Historical data



Perceived Safety of Travel Activities (Wave 22)

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

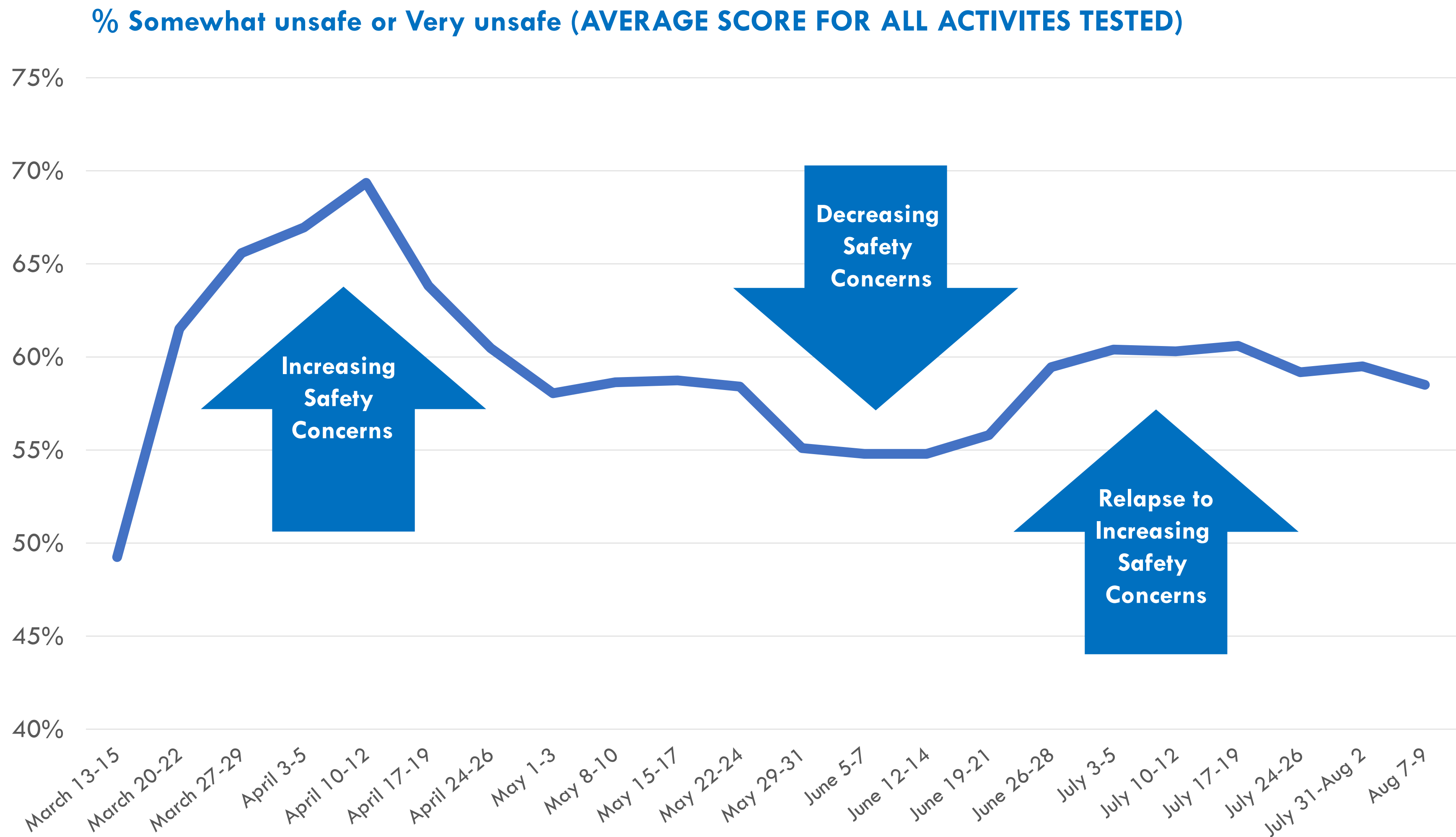
(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



Perceived Safety of Travel Activities (Waves 1-22 Comparison)

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

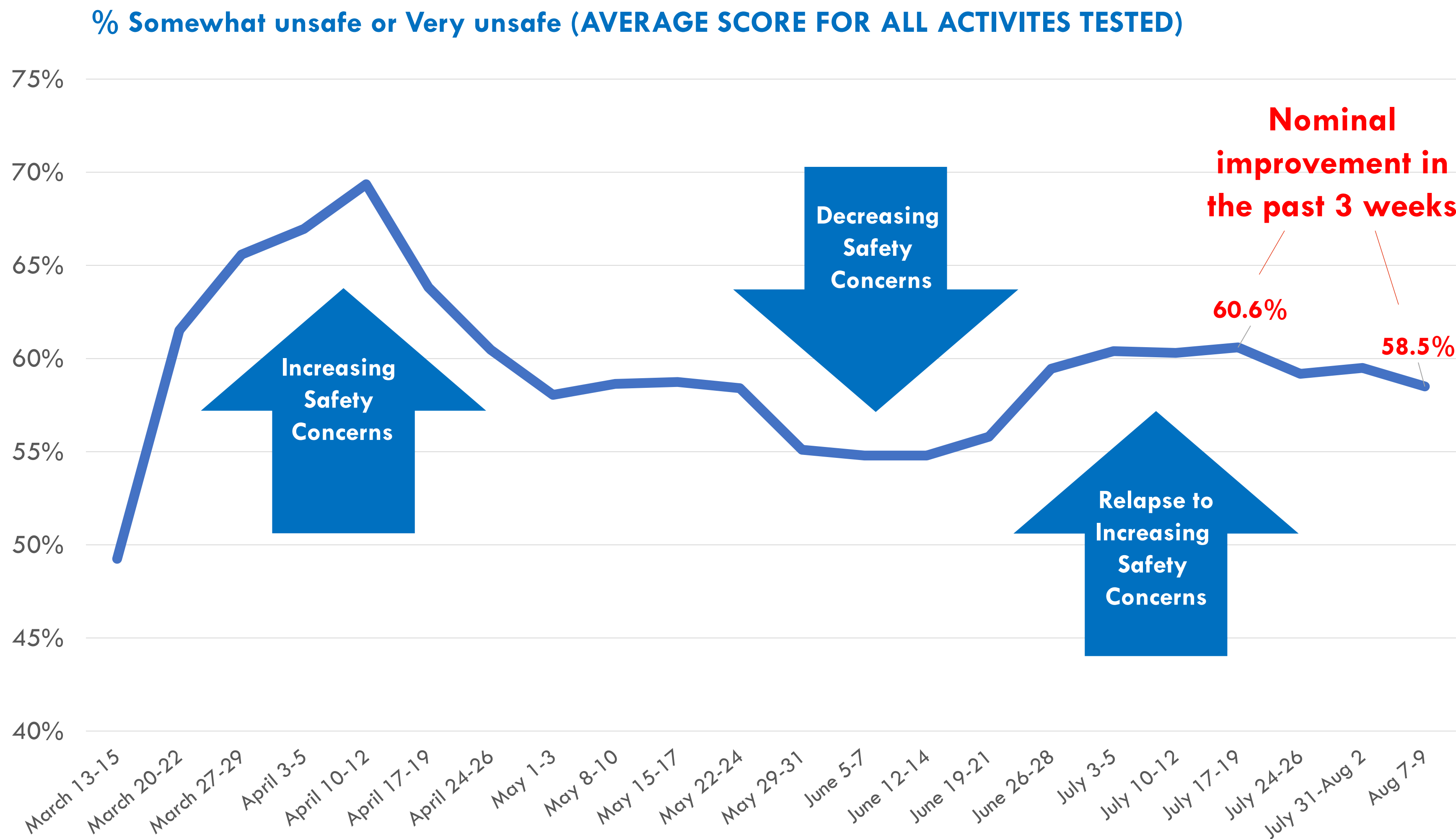
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 2020)



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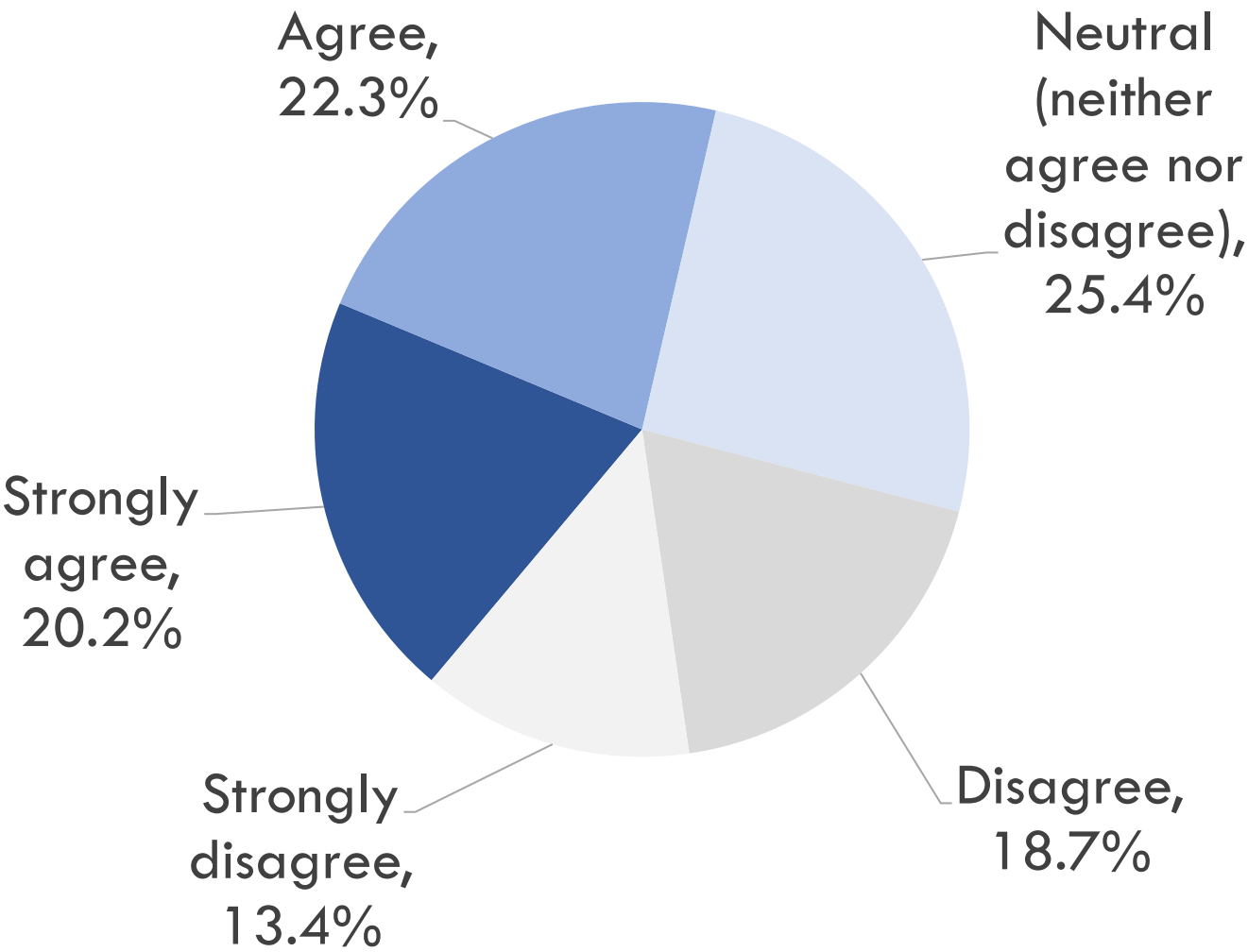
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 2020)



Won't Travel Without Vaccine

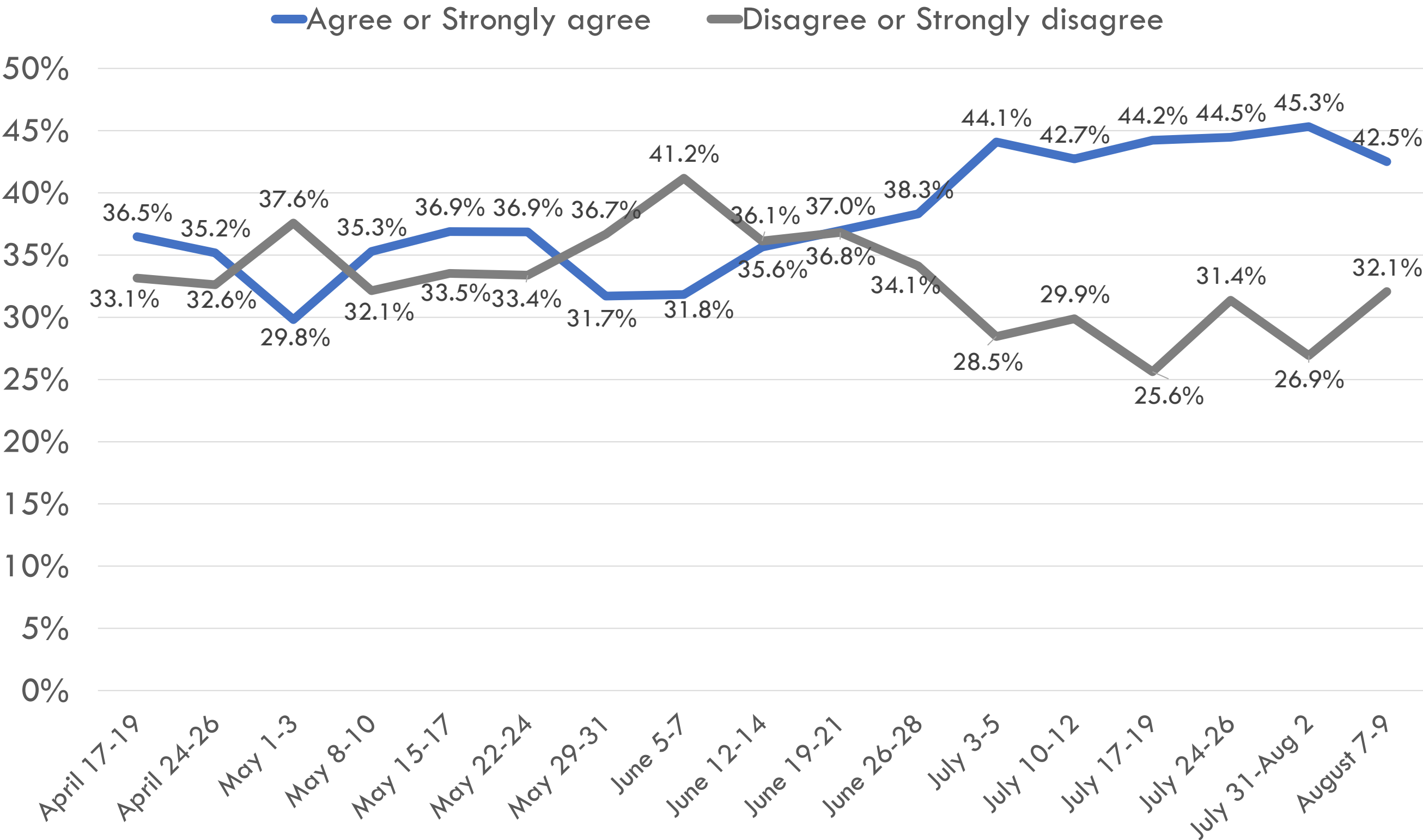
How much do you agree with the following statement?

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



(Base: 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 and 1,201 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, 17-19, 24-26, 31-August 2 and 7-9, 2020)

Historical data



A child dressed as a pilot, wearing a brown leather flight suit, goggles, and a matching cap. The child is holding a large, dark brown suitcase with metal latches. A camera is attached to the child's cap. The background is a soft, warm sunset sky with orange and yellow hues. The child is smiling and has their arms outstretched.

How much do you agree with the following statement?

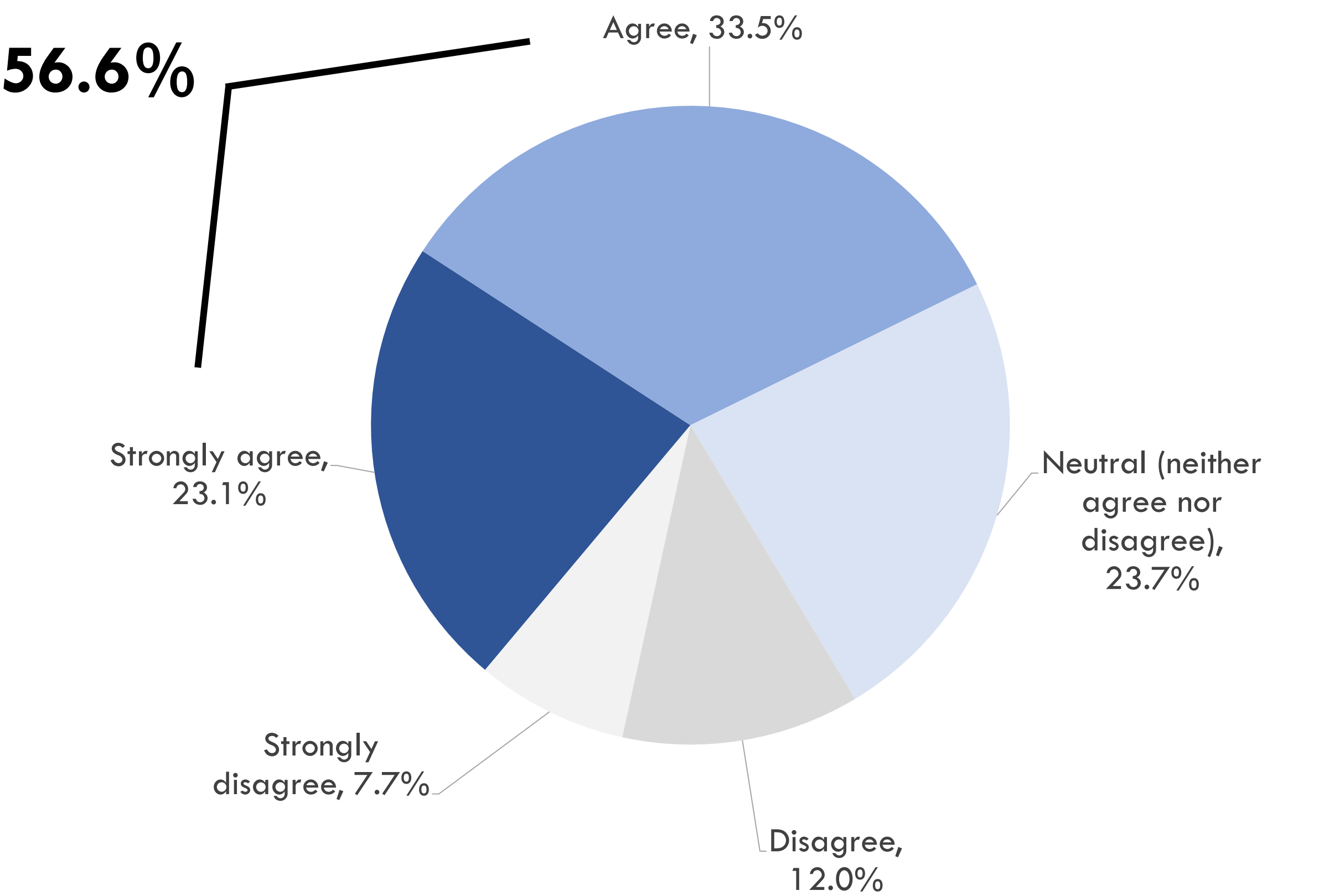
Having a vacation scheduled in the next six months would make me feel there is something happy to look forward to

Scheduling a Vacation is Provides Something to Look Forward to

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: All respondents, 1,201 completed surveys.
Data collected Aug 7-9, 2020)

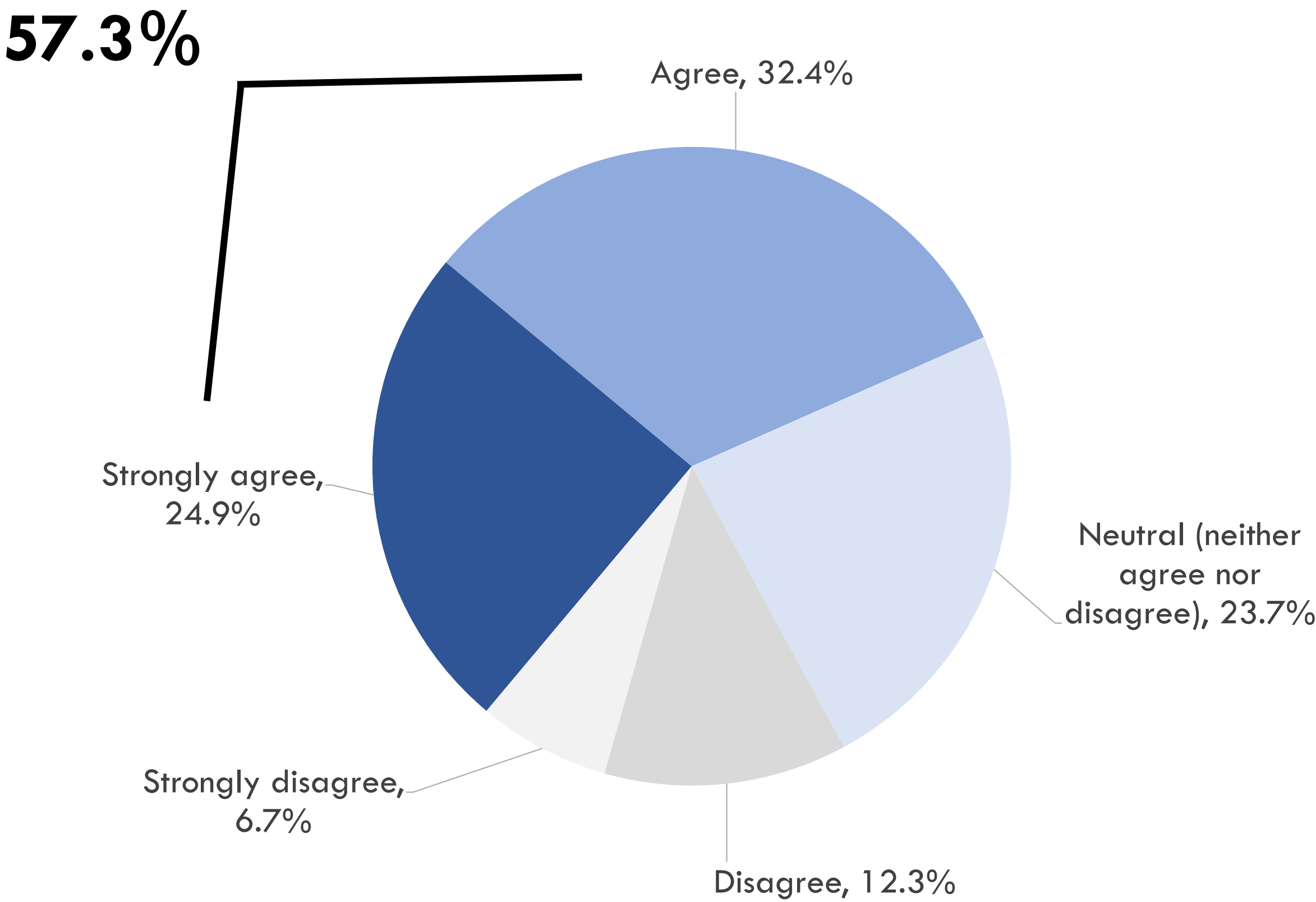


How much do you agree with the following statement?

*Planning a vacation for some time in the next six months
would bring me happiness*



Planning a Vacation in the Next 6 Months Brings Happiness



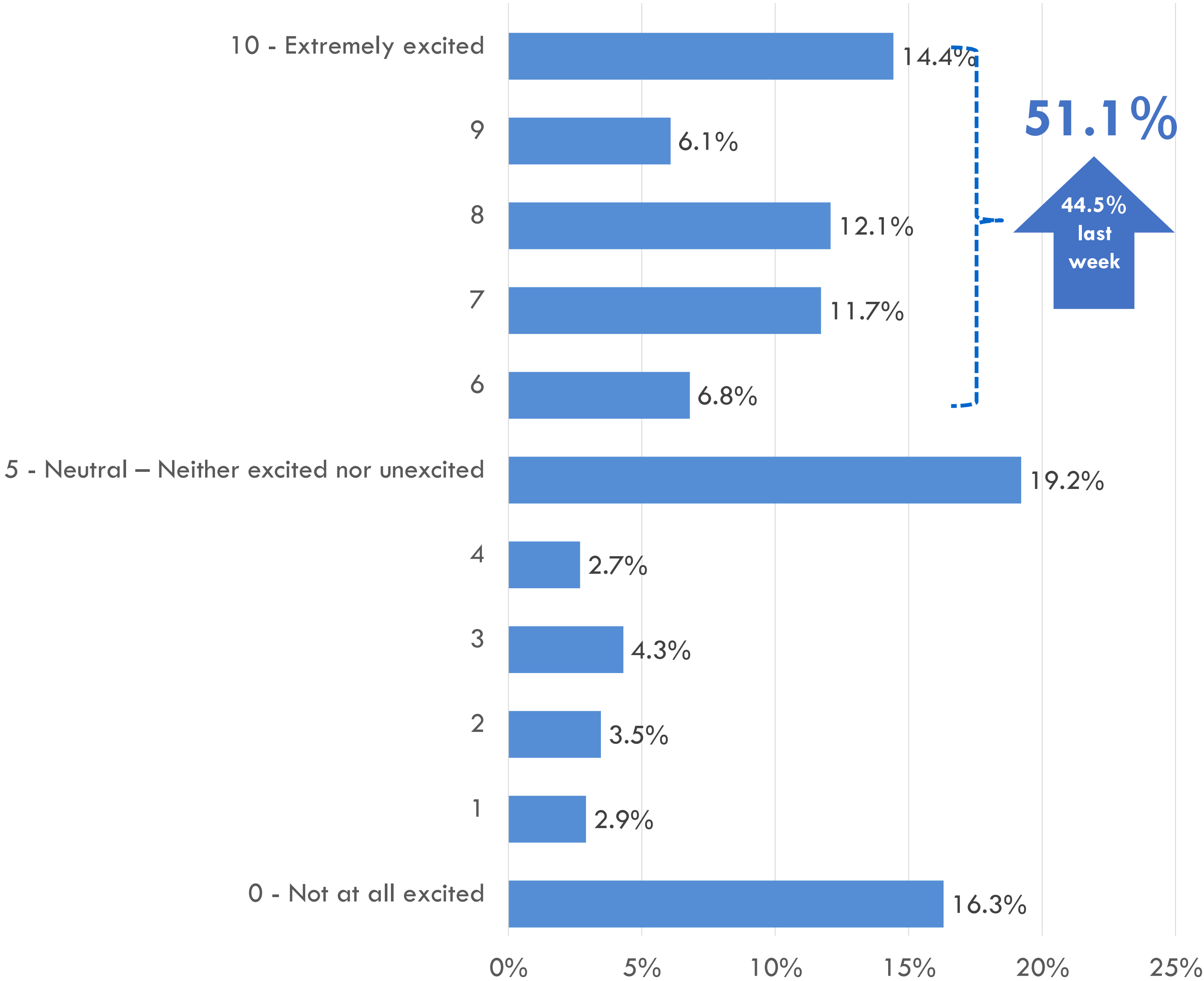
How much do you agree with the following statement? **Statement:** Planning a vacation for sometime in the next six months would bring me happiness.

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)

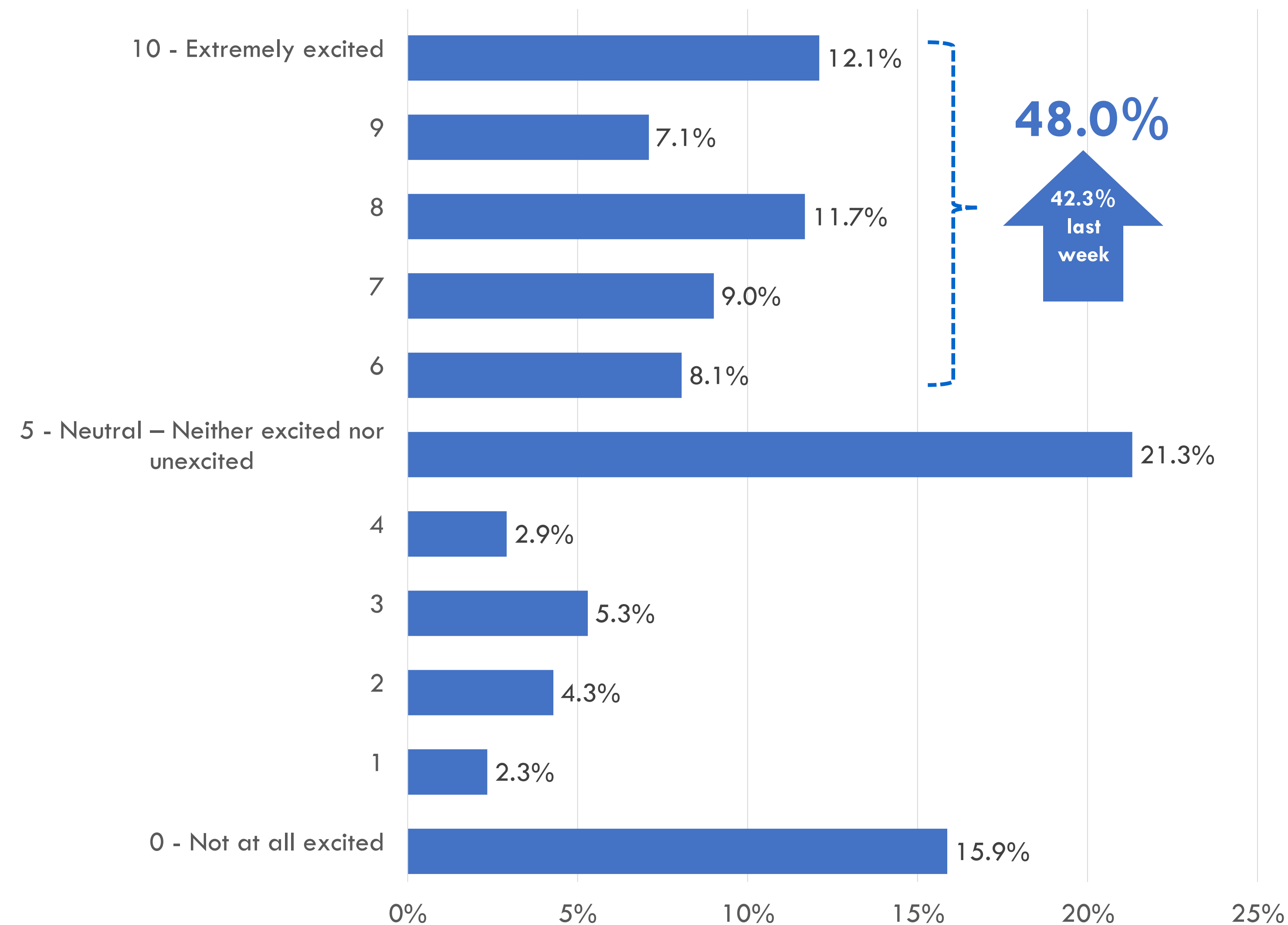
(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



Openness to Travel Information

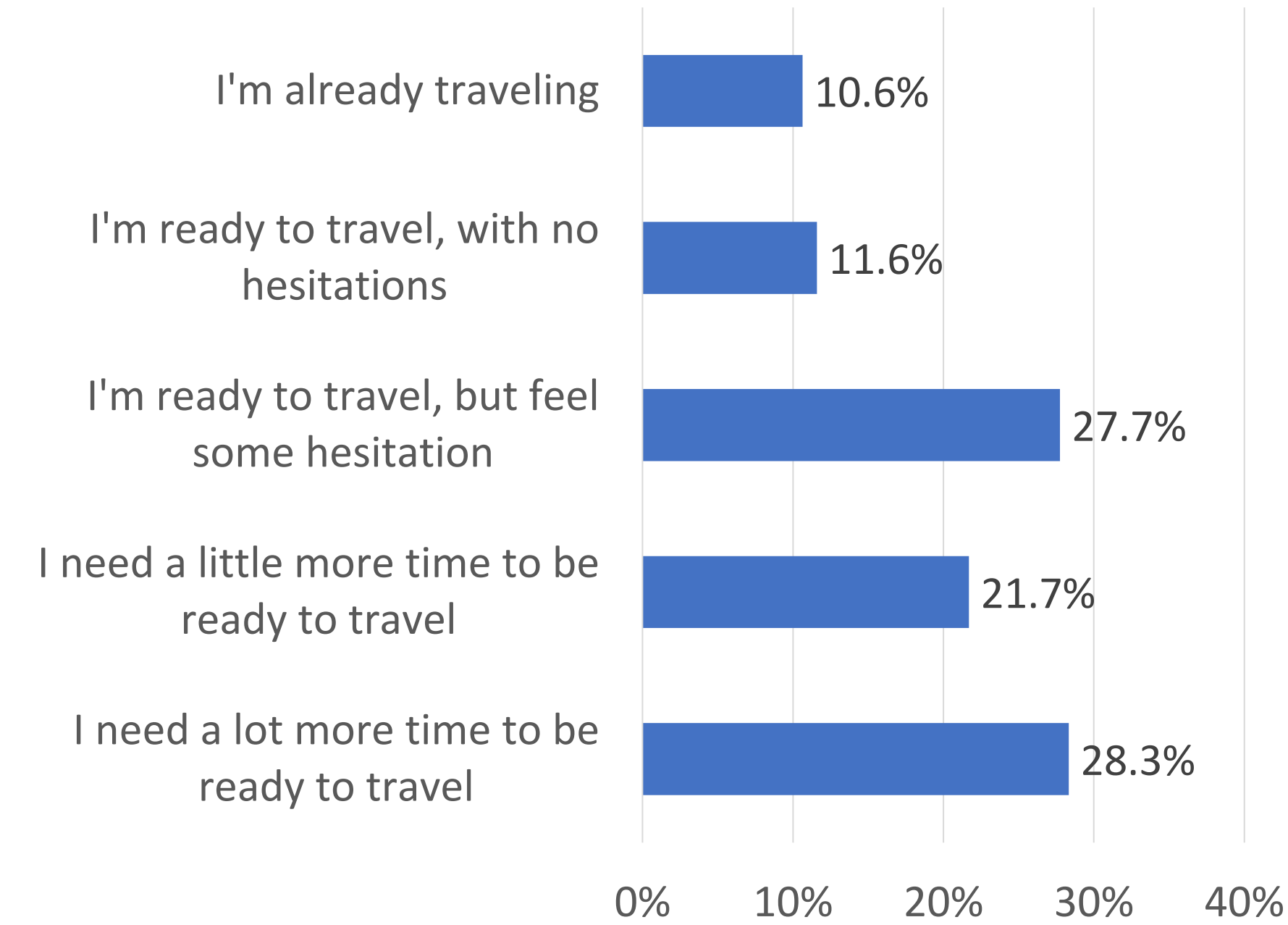
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



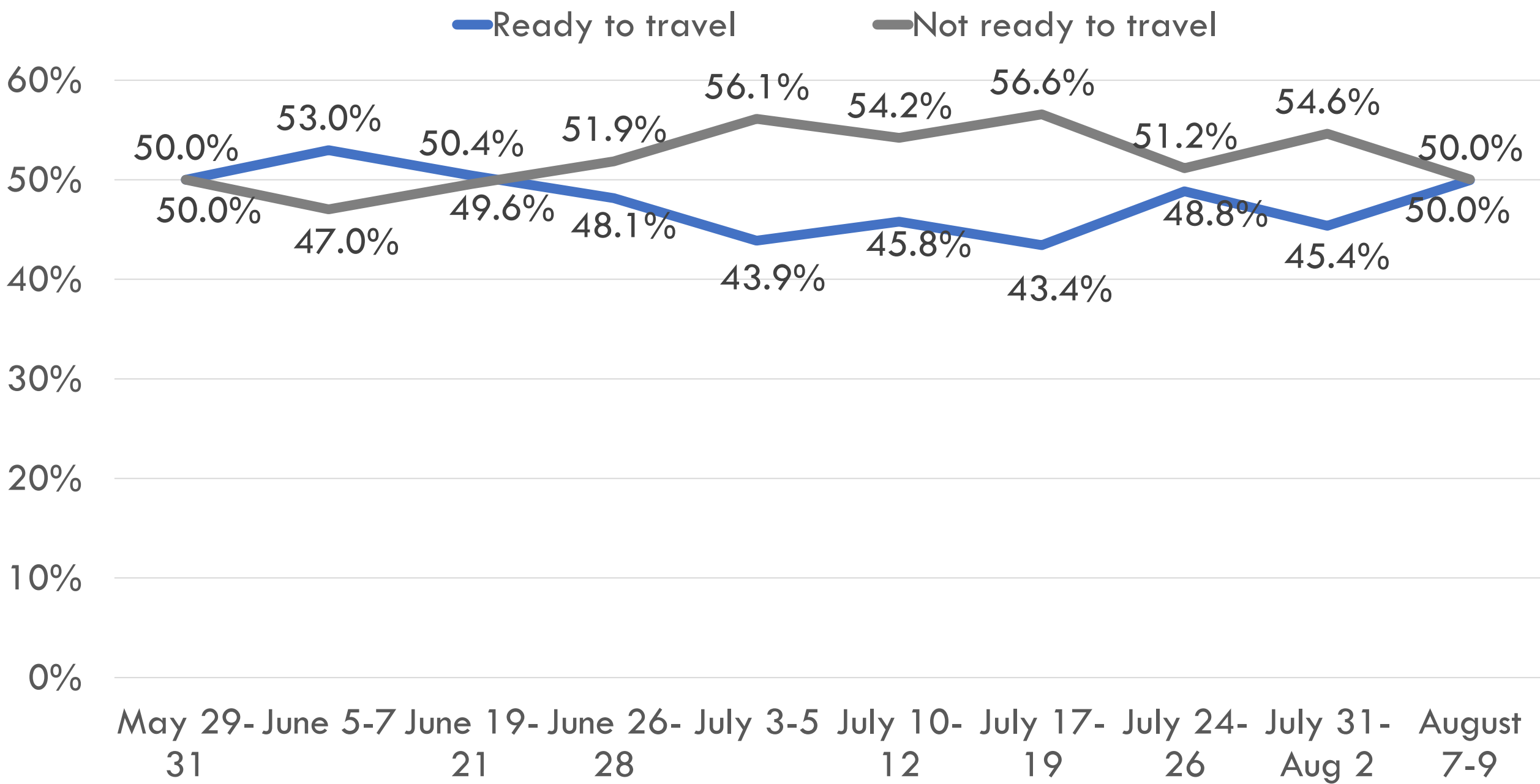
Travel State-of-Mind

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



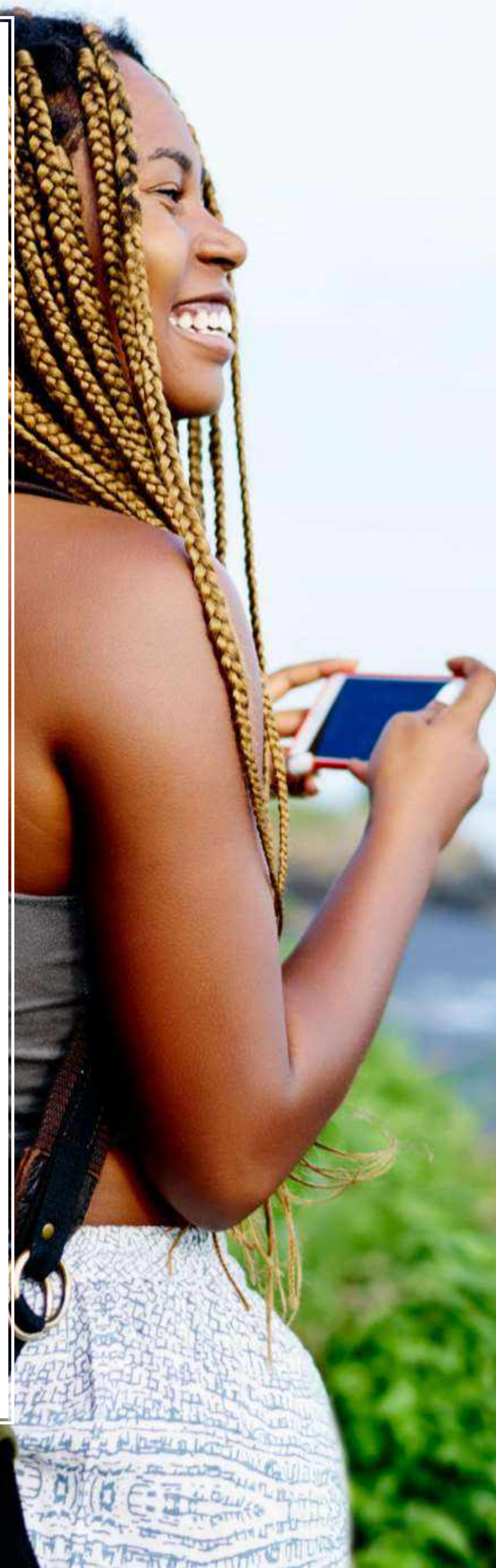
(Base: All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

Historical data



Key Takeaways

- Expectations for the pandemic improving remain low while financial and health safety concerns remain high
- Travel is well positioned as a wellness activity—scheduling and planning a vacation generates happiness for many
- Driven by younger travelers, excitement for near-term travel and openness to travel inspiration returned to levels last seen in early June
- Americans are evenly split on travel readiness

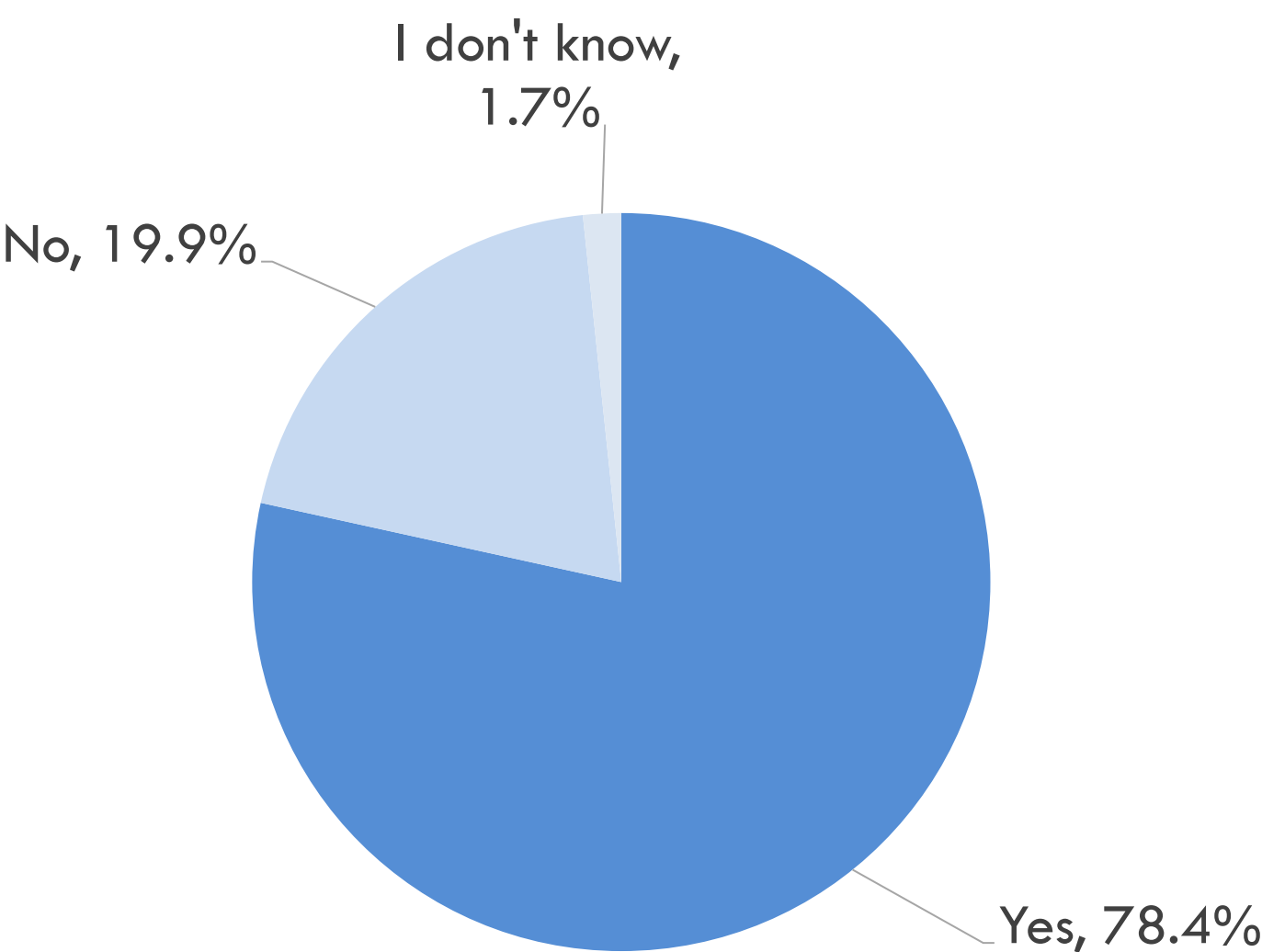




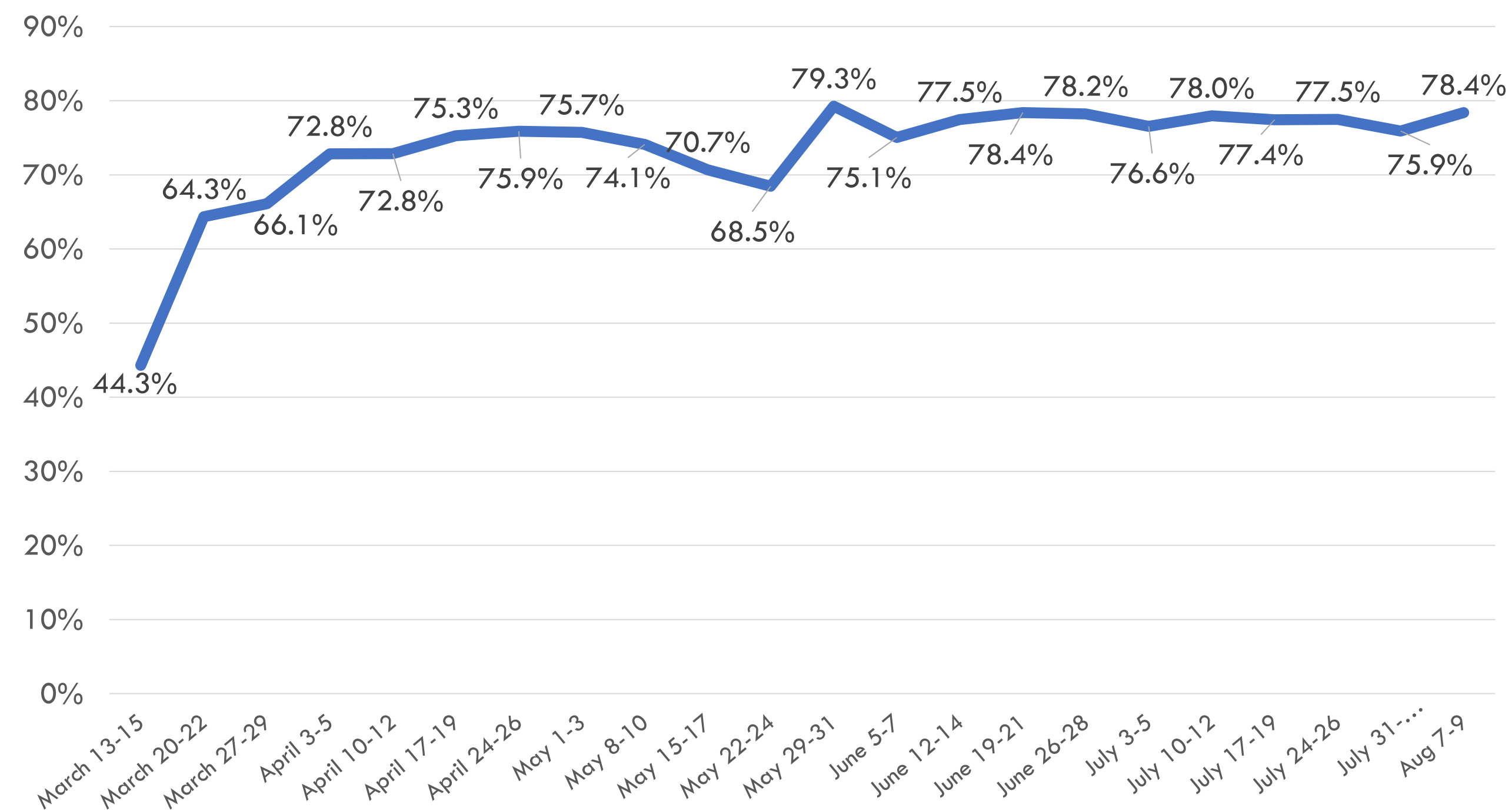
How Americans Plan to Travel

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



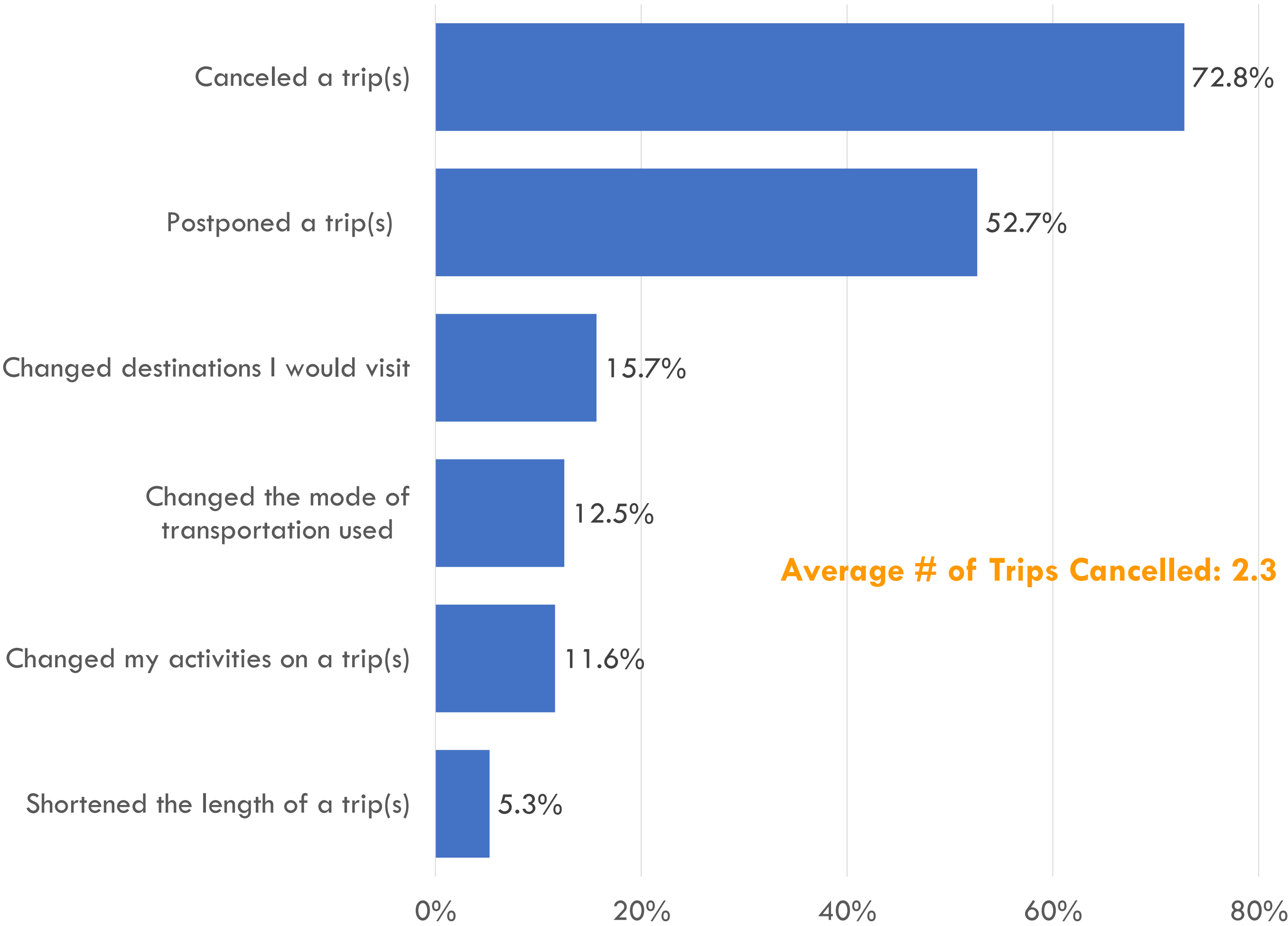
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How the Coronavirus has Impacted Travel

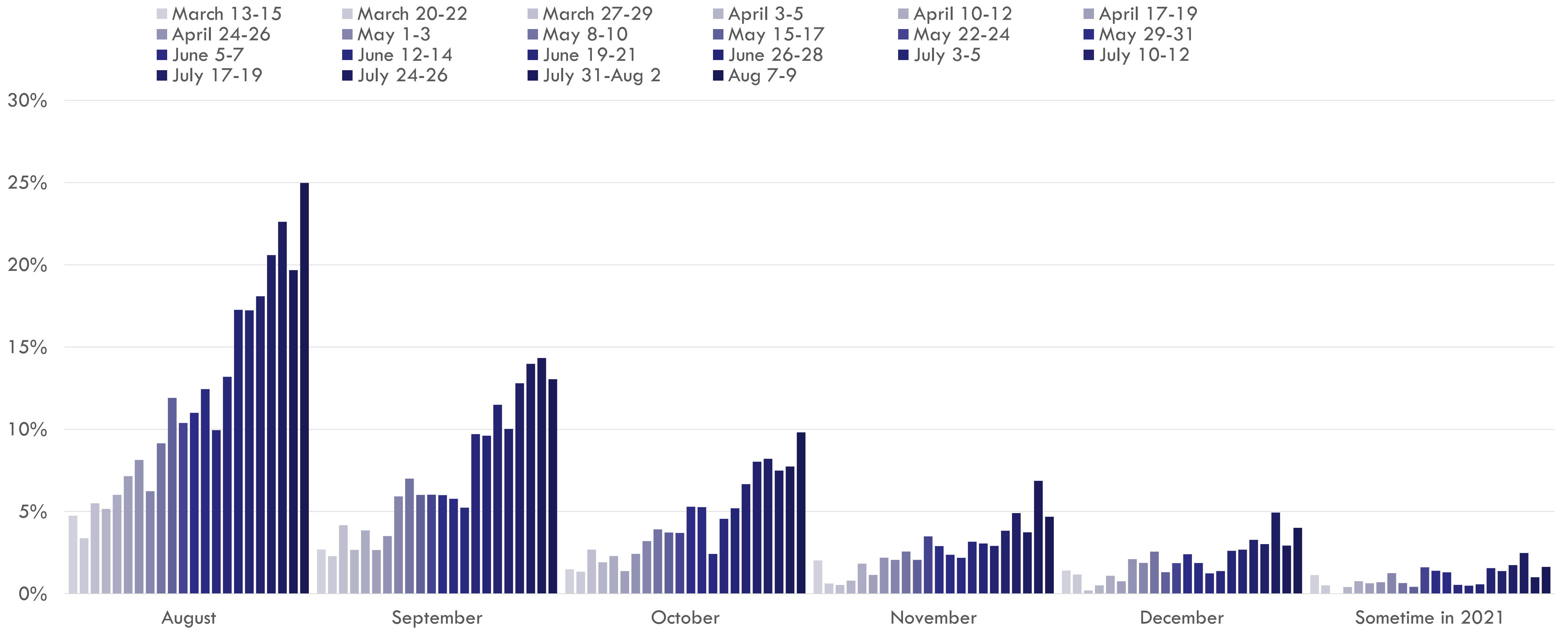
Question: How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have_____.

(Base: All respondents with travel impacted by the pandemic, 553, 770, 795, 890, 937, 929, 903, 926, 903, 871, 843, 993, 923, 952, 957, 974, 1,050, 954, 941, 960, 944 and 952 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug. 2, and Aug. 7-9, 2020)



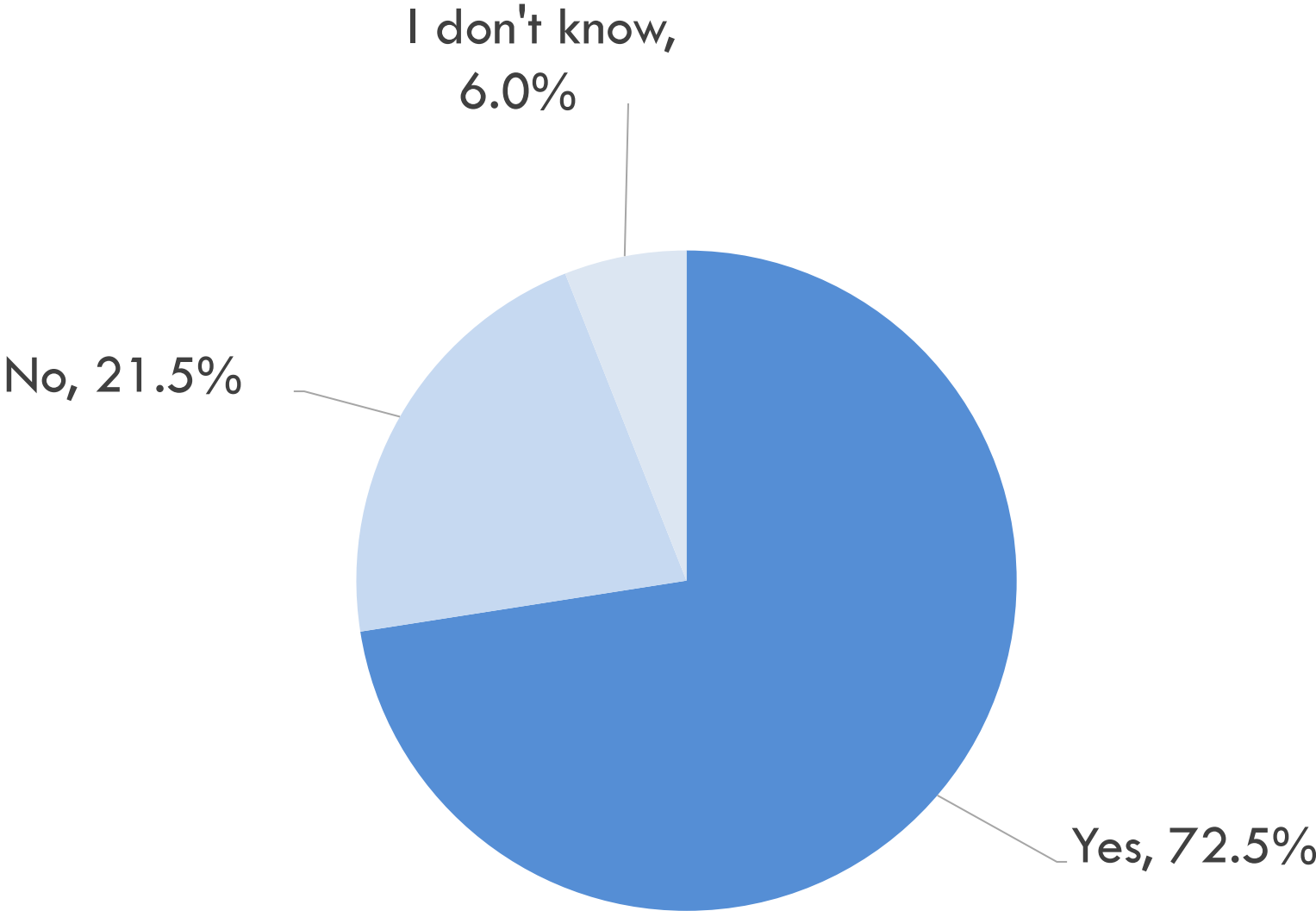
Month of Trip Cancellation



(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728, 675, 672, 664 and 687 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug. 2 and Aug. 7-9, 2020)

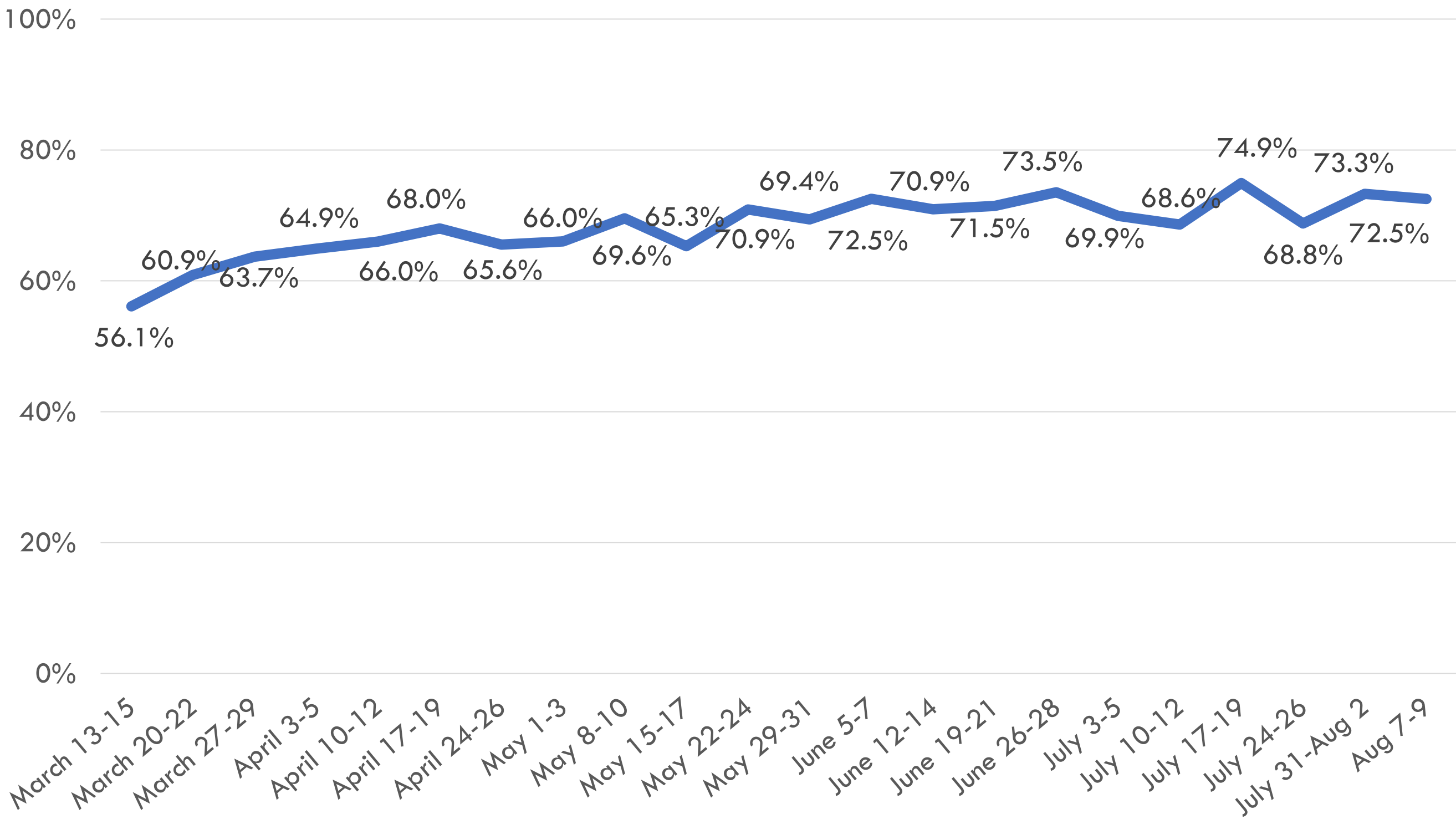
Did Traveler Get Full Refunds?

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



(Base: Wave 22 data. Respondents cancelling a trip, 687 completed surveys. Data collected August 7-9, 2020)

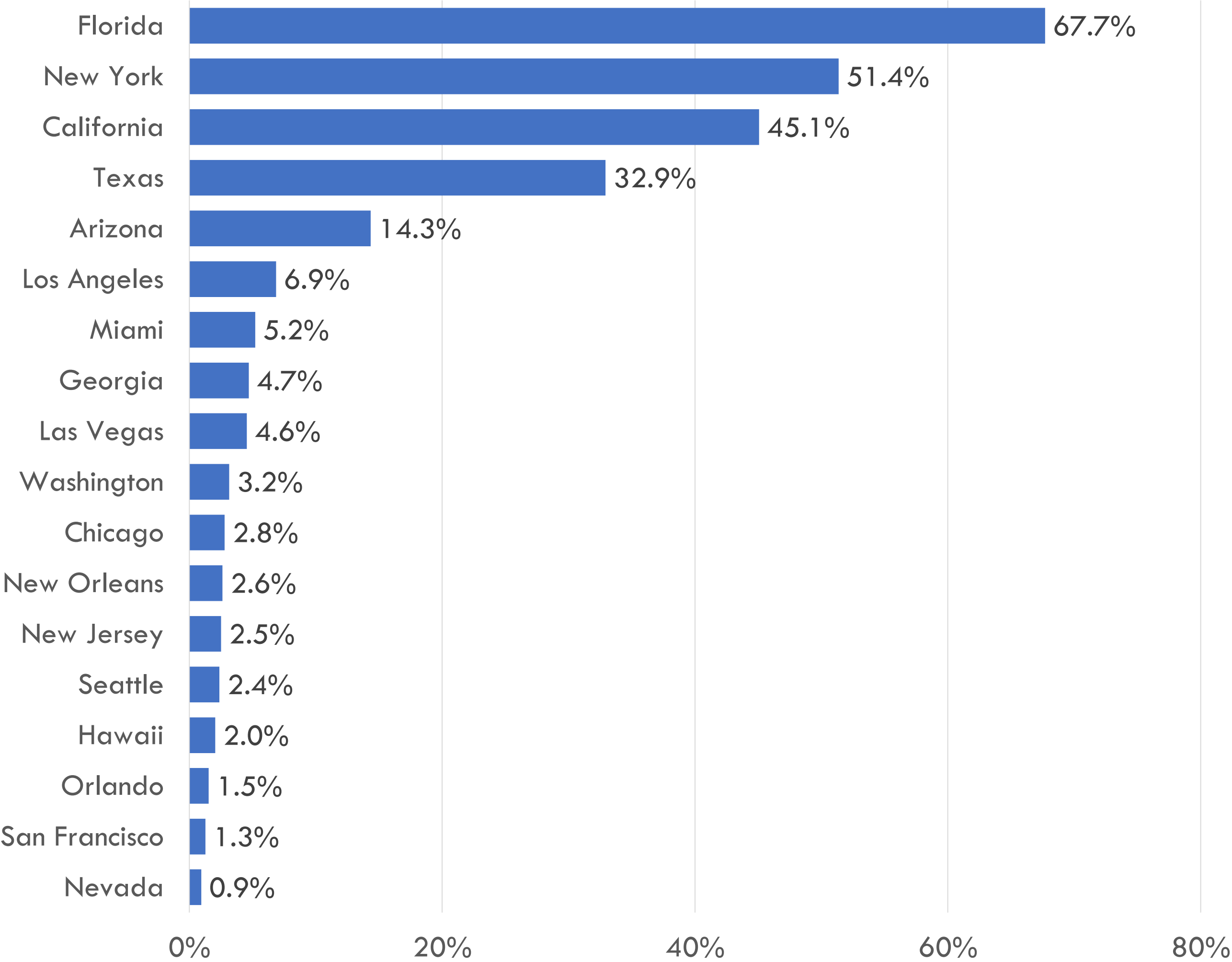
Historical data



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)

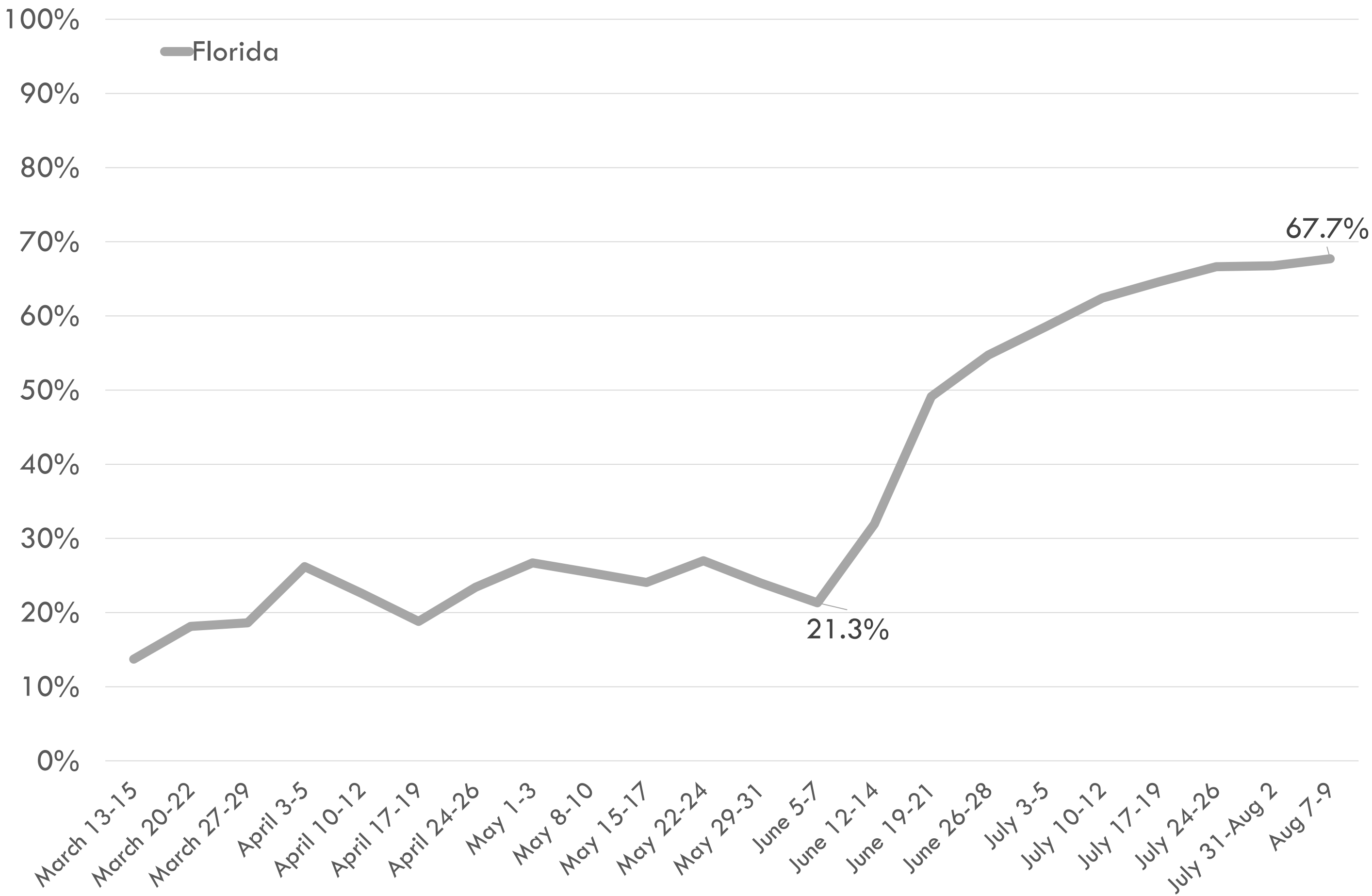
(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected Aug 7-9, 2020)



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)**

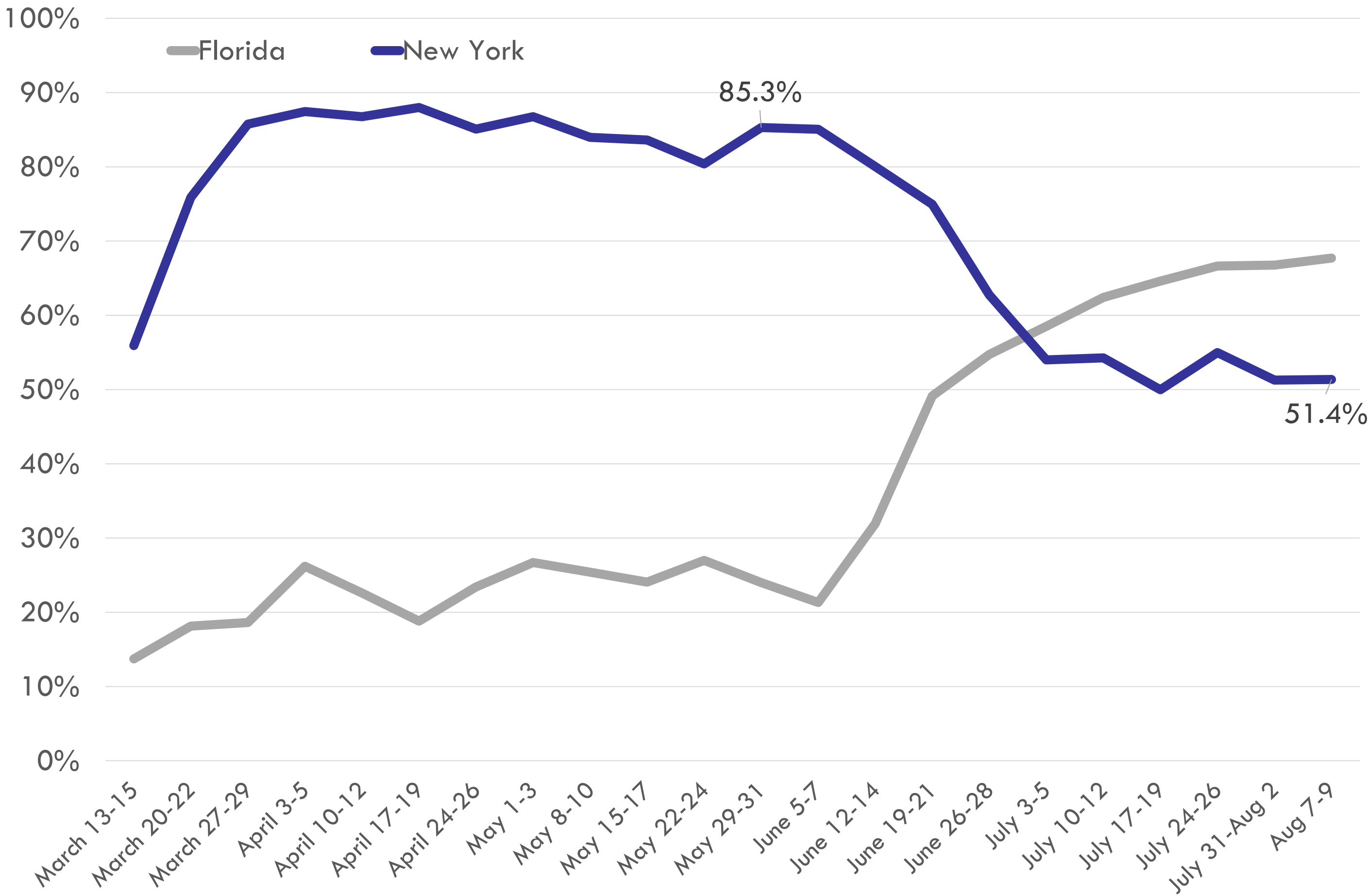
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 2020)



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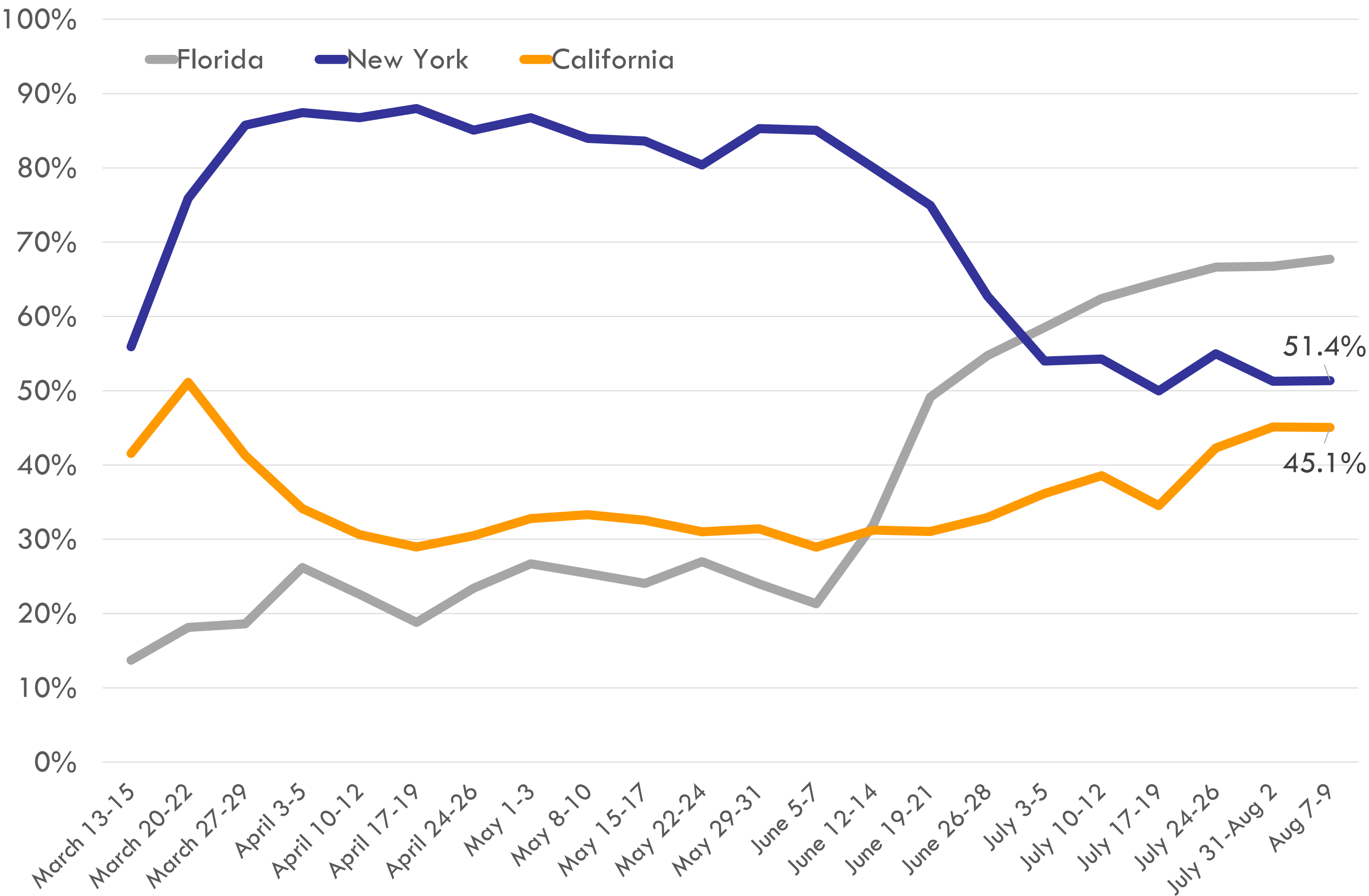
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 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)

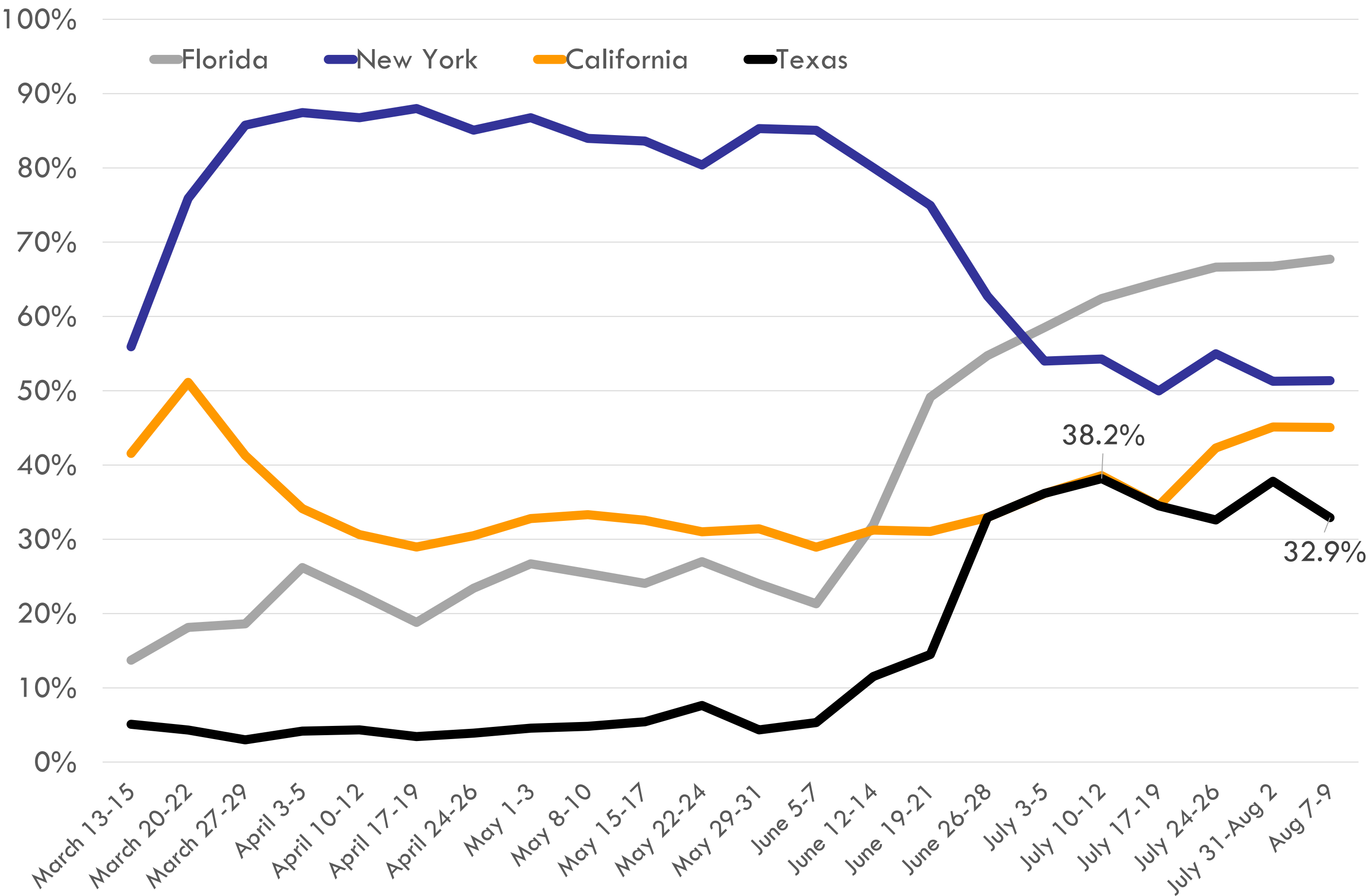
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 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)

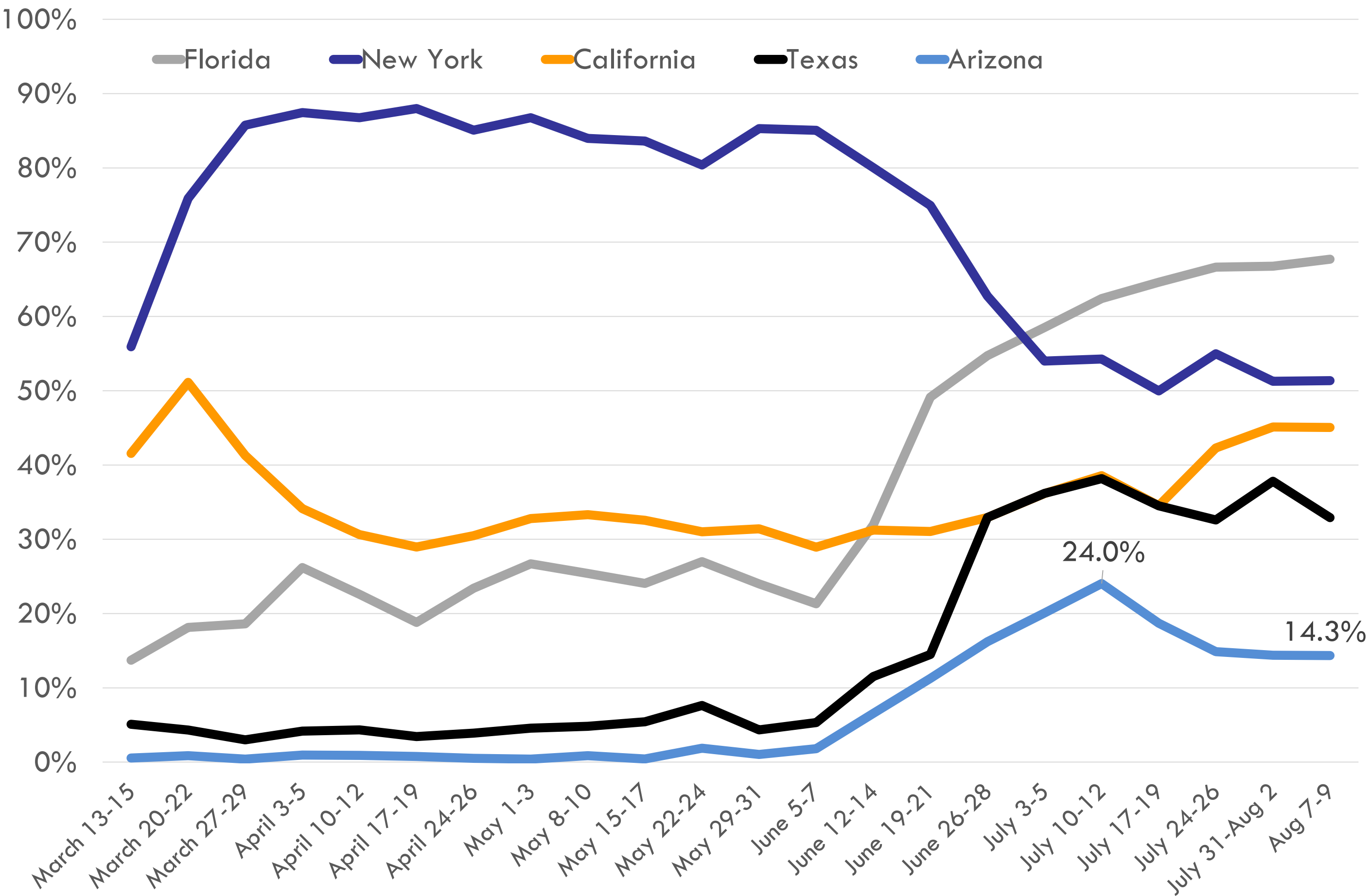
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 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)

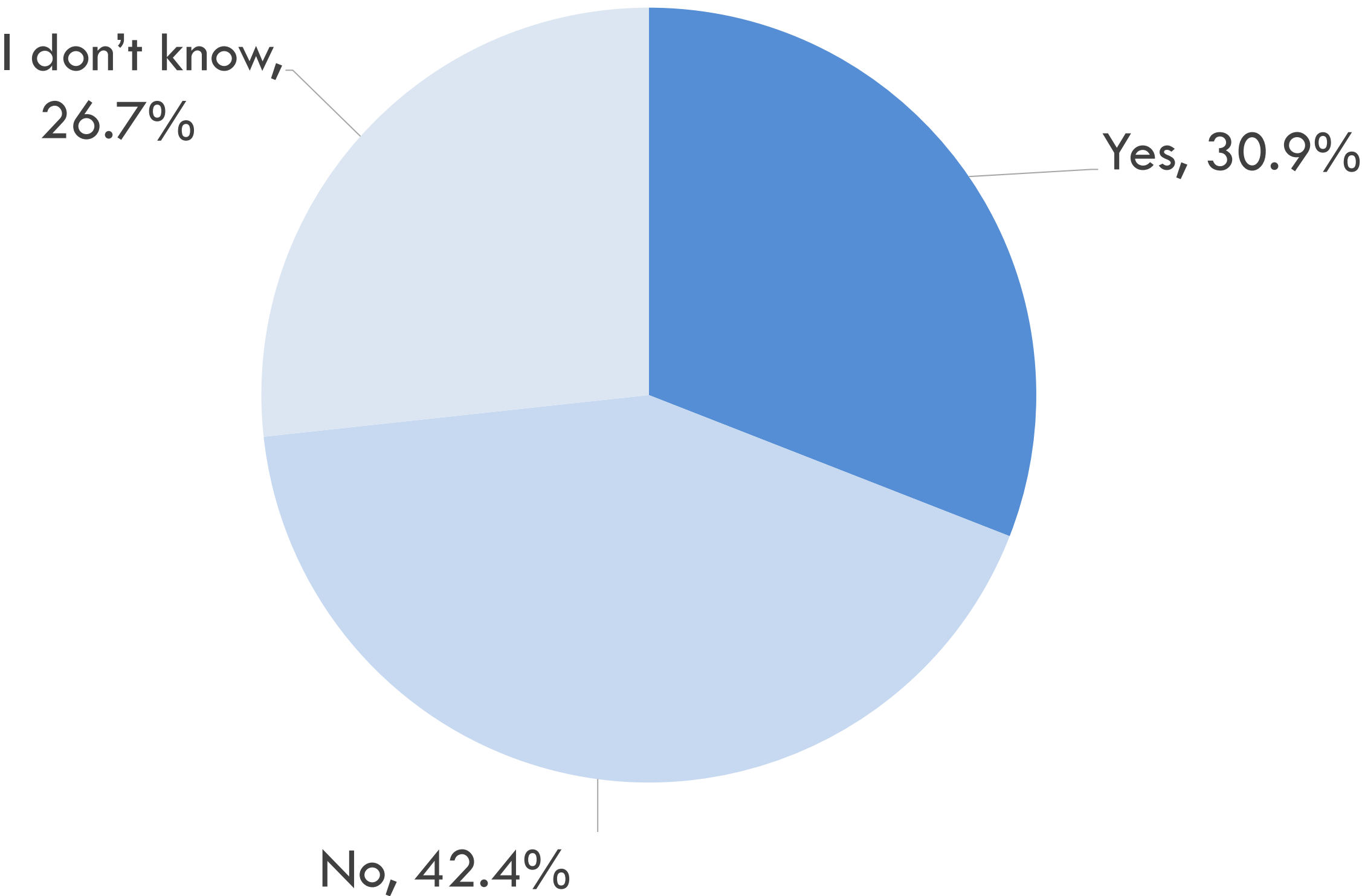
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 2020)



Impact of Coronavirus Issues on Future Intent to Visit

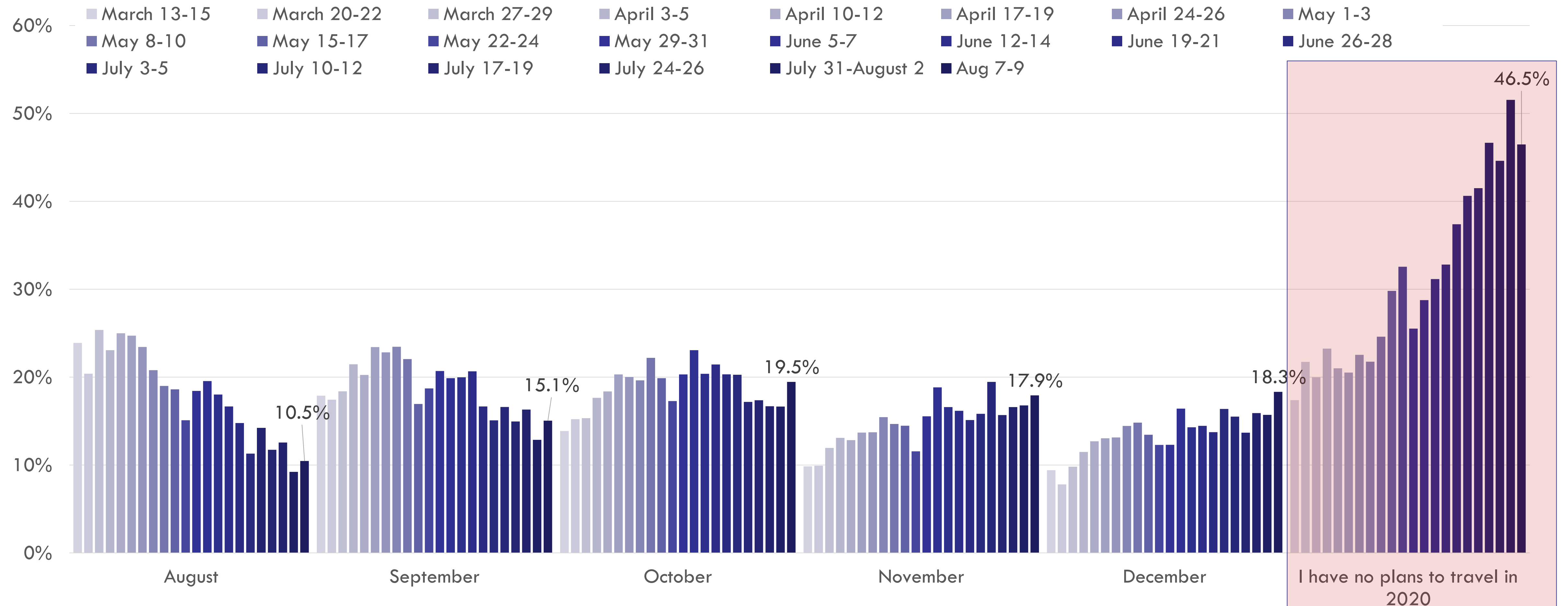
Question: When the coronavirus situation is over, will you be less likely to visit any of these destinations because of their current Coronavirus-related issues?

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)



Upcoming Travel Plans

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

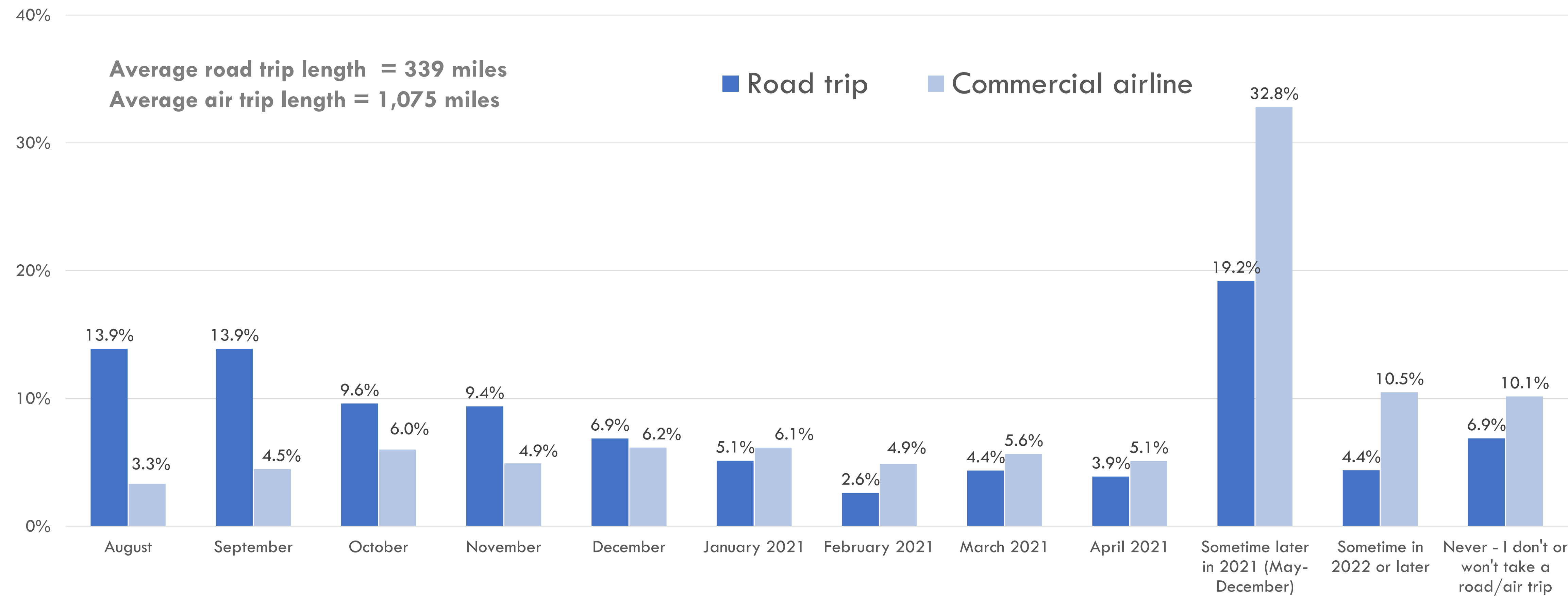


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2 and Aug 7-9, 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?

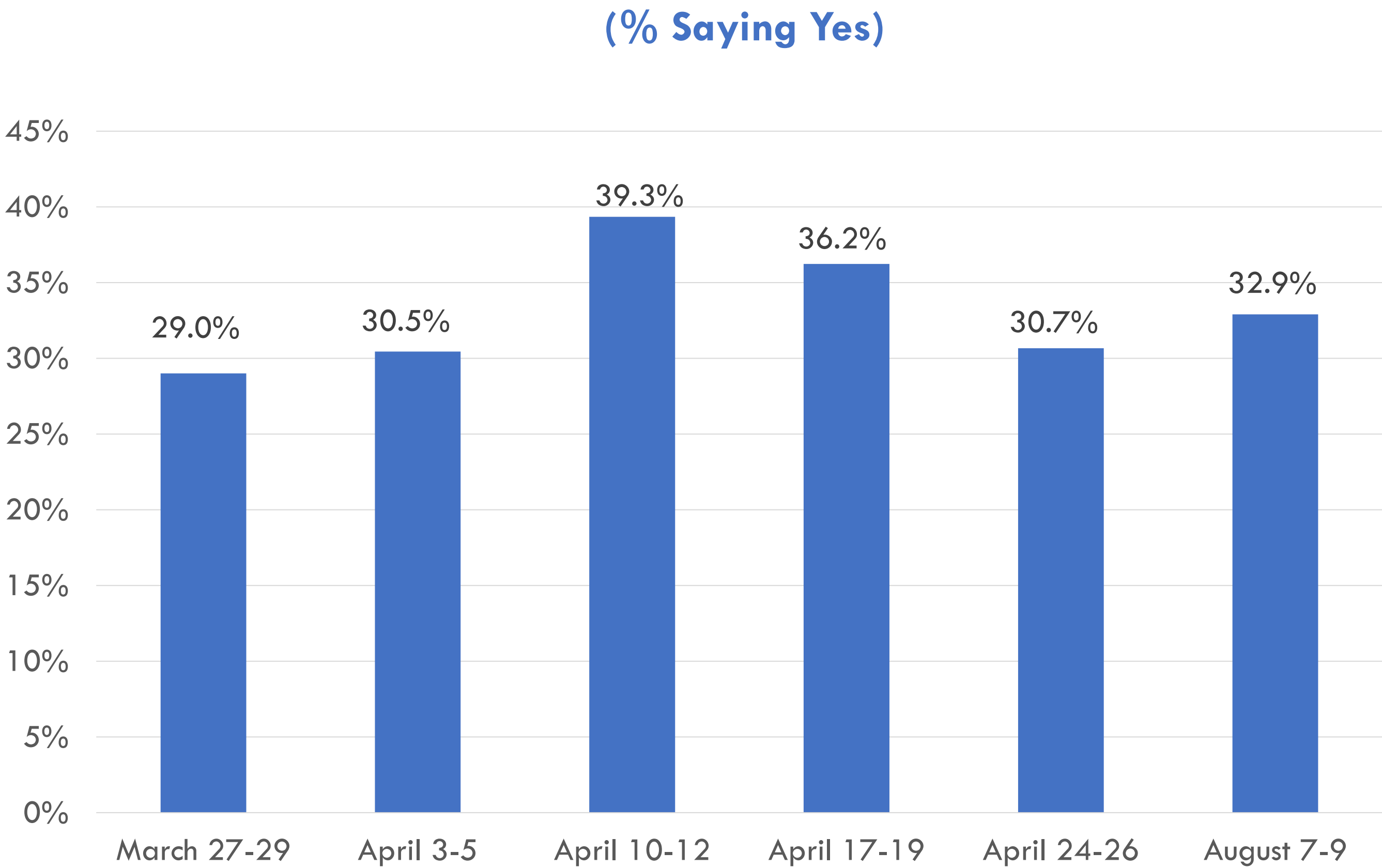


Expectations to Change Travel Destinations After the Pandemic

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

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

(Base: All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,201 completed surveys. Data collected March 27-29, April 3-5, 10-12, 17-19, 24-26 and Aug 7-9, 2020)



ANTICIPATED IMPACT OF THE PANDEMIC ON FUTURE TRAVEL BEHAVIORS:

APRIL VS AUGUST



QUESTION: DO YOU EXPECT THAT YOU WILL AVOID ANY OF THE FOLLOWING IN THE SIX-MONTH PERIOD IMMEDIATELY AFTER THE CORONAVIRUS SITUATION IS RESOLVED? (SELECT ALL THAT WOULD COMPLETE THE FOLLOWING SENTENCE FOR YOU: I WILL MOST LIKELY AVOID _____.)

(Base: All respondents, 1,200 and 1,201 completed surveys.
Data collected April 10-12 and August 7-9, 2020)

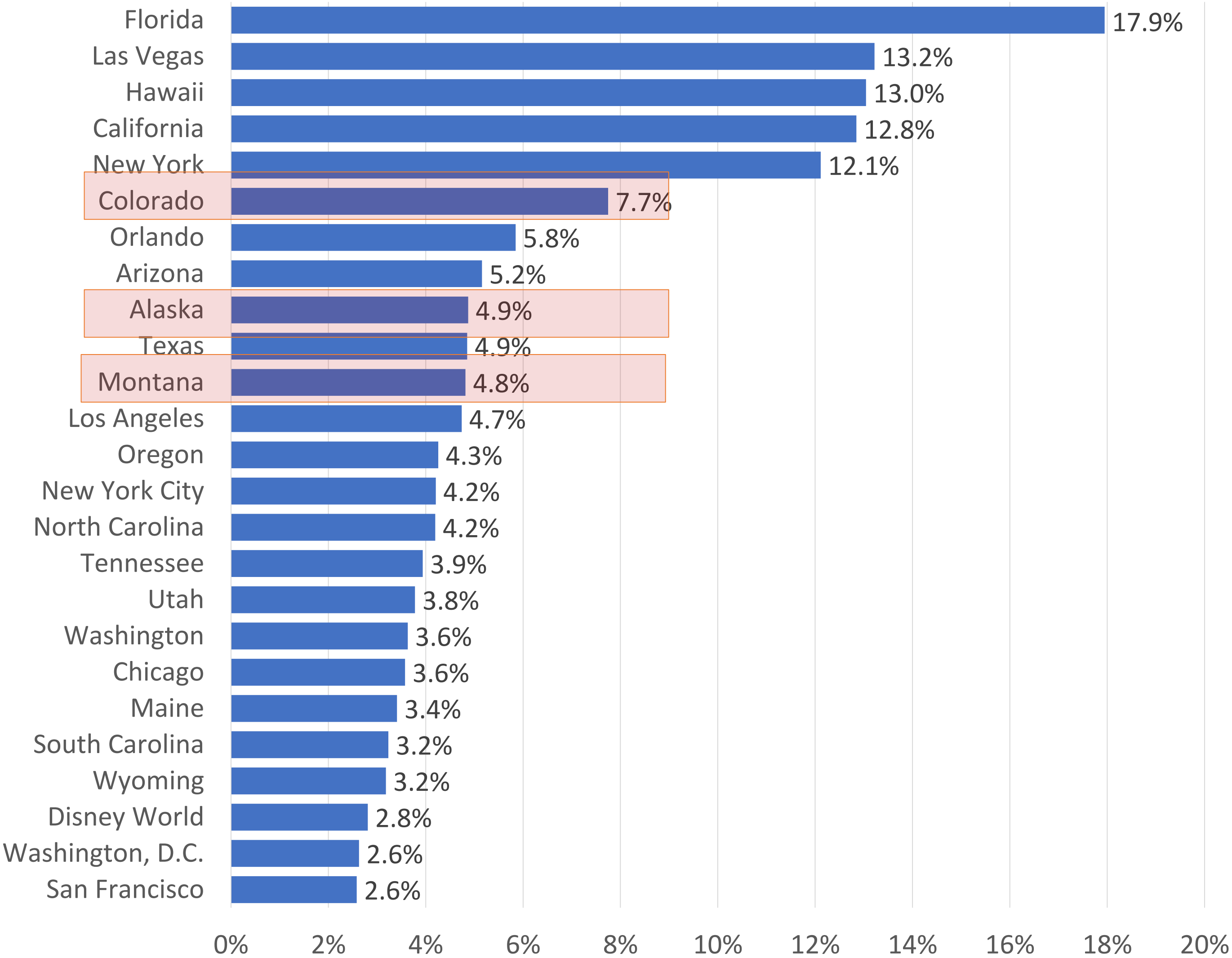


**Where do we most
want to visit in the
next year?**

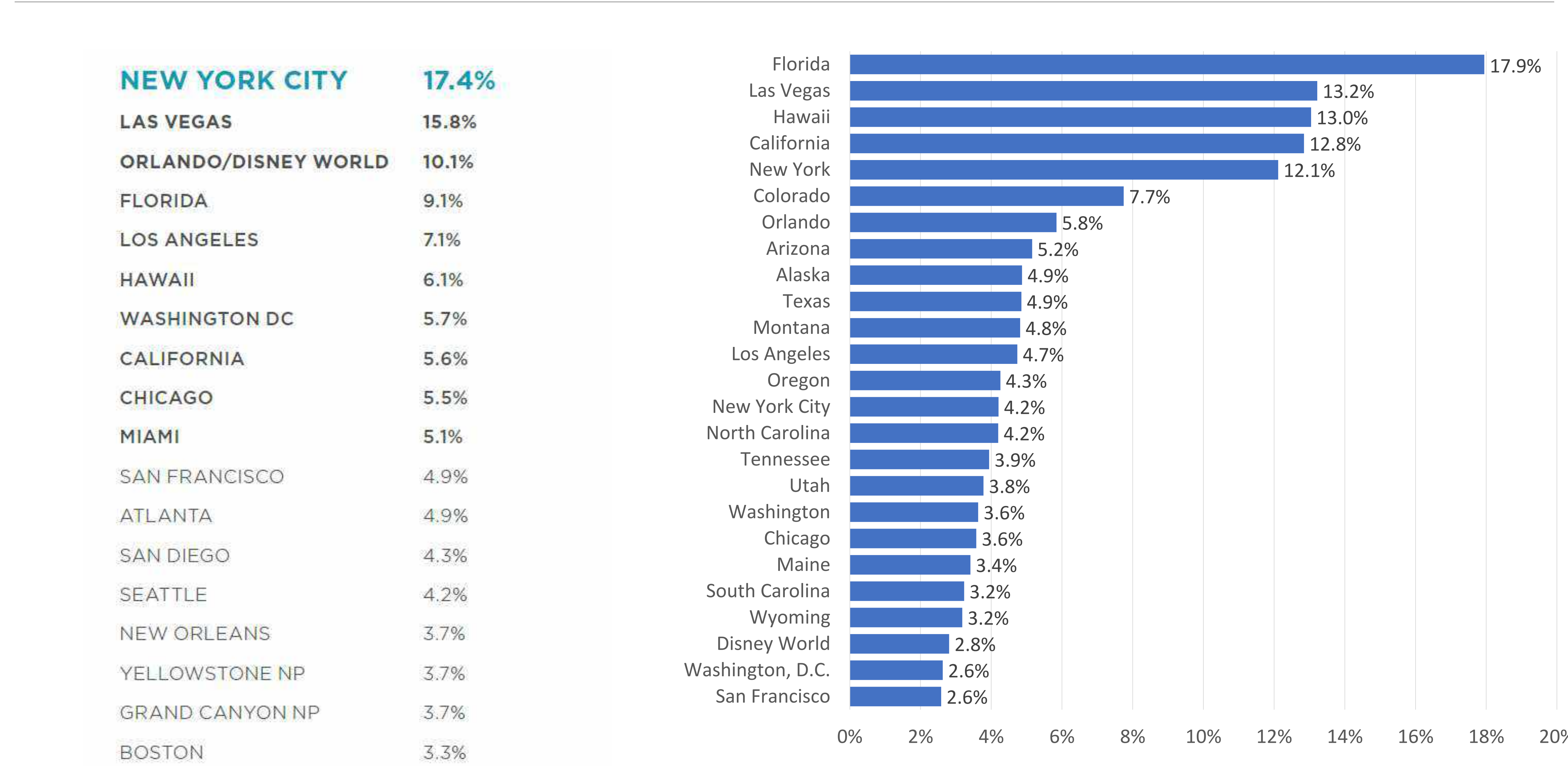
Most Desired Destinations (Top 25)

Question: What are the **THREE (3)** **United States travel destinations** that you most want to visit in the next **TWELVE (12) MONTHS?** Please only consider travel destinations in the **United States.**

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)

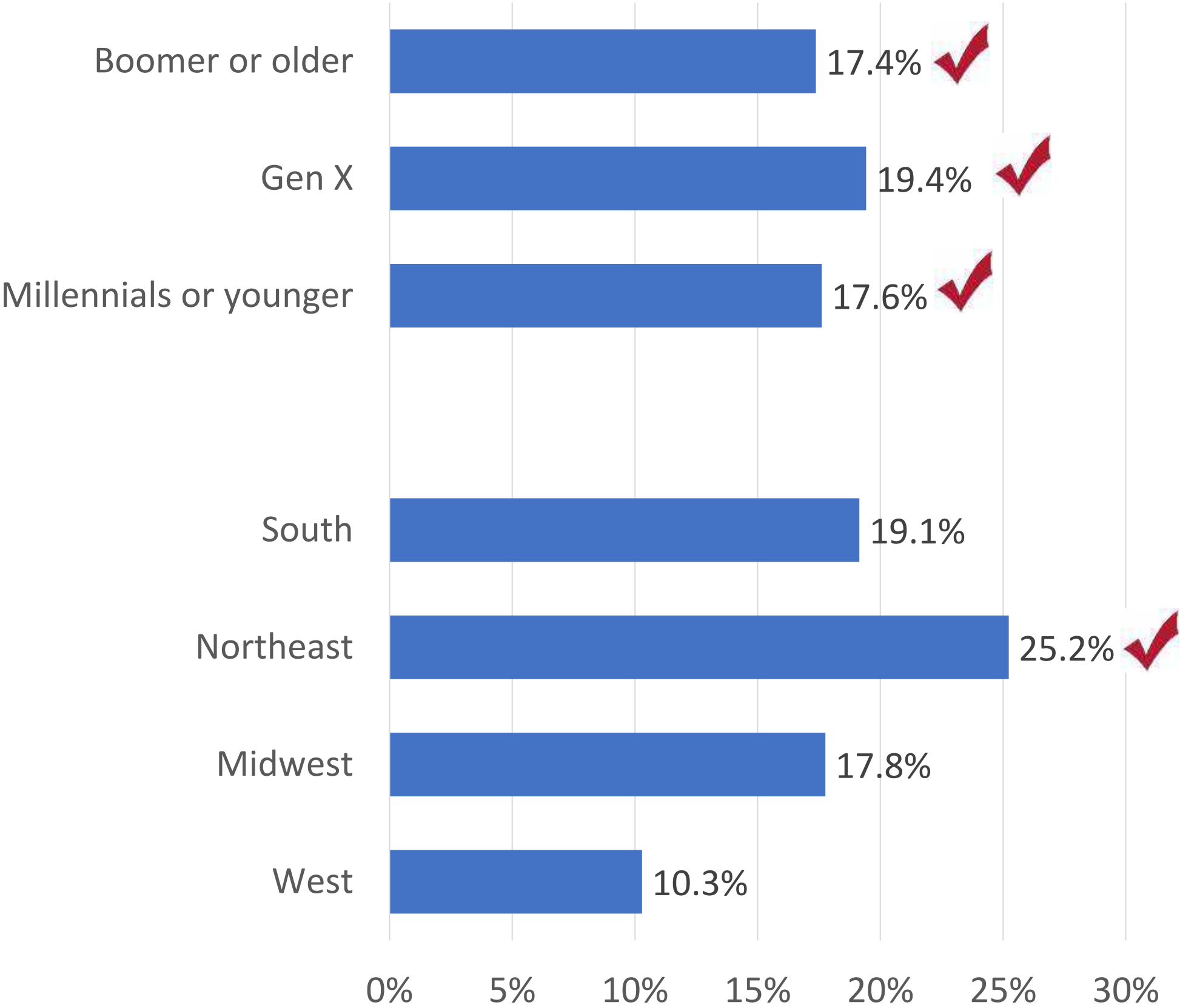


Most Desired Destinations: January vs August

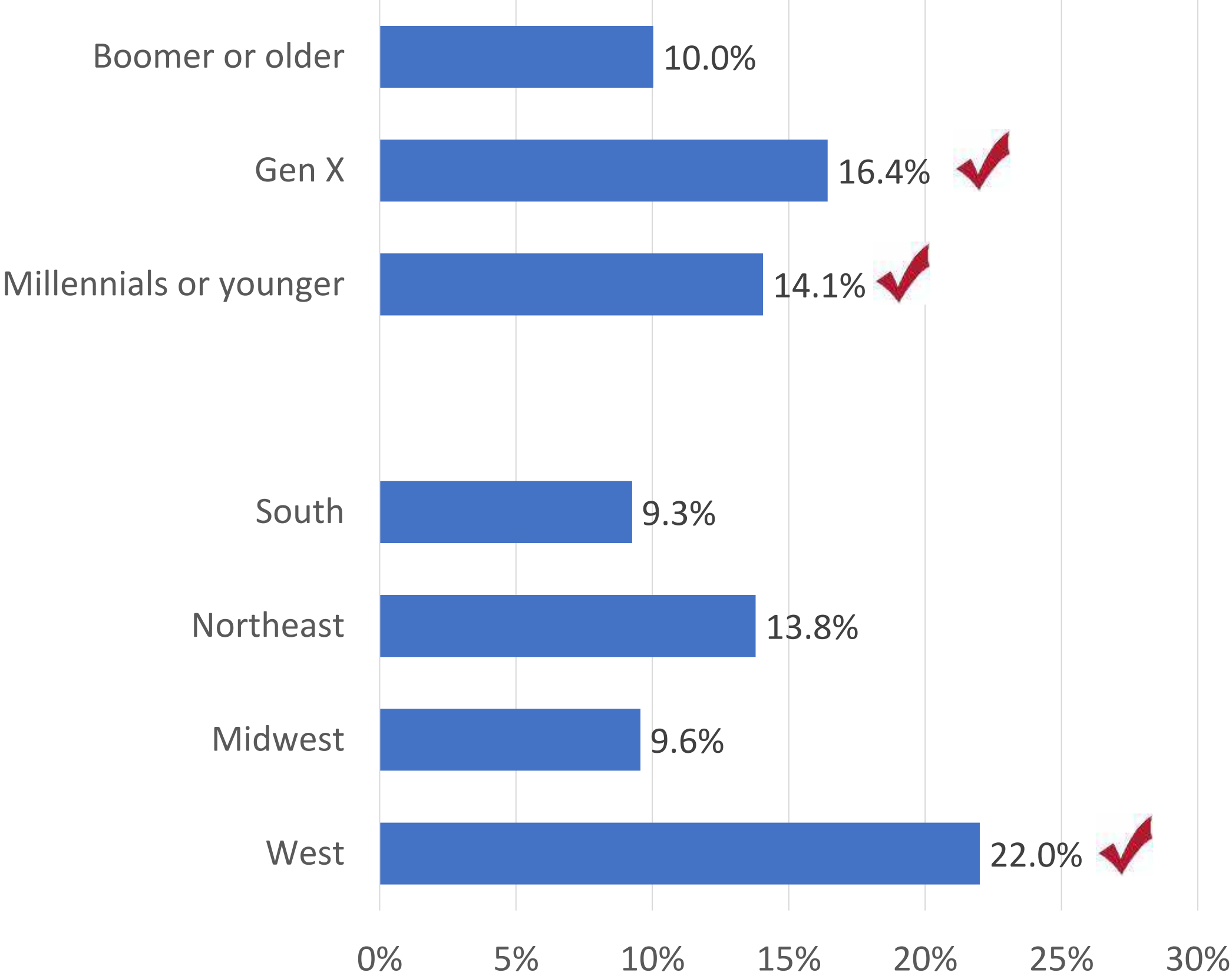


Most Desired Destinations (Florida & Hawaii)

Florida

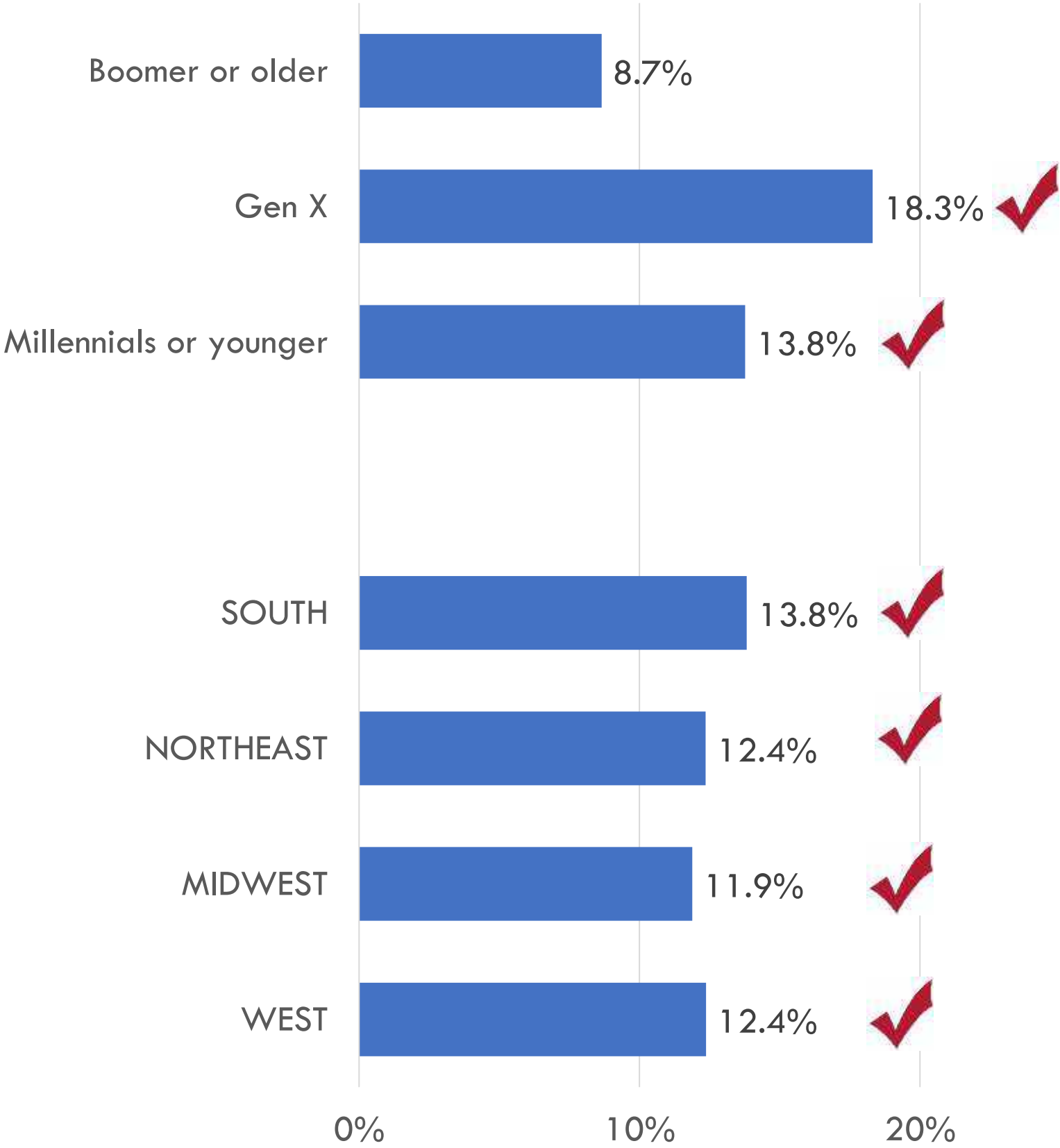


Hawaii

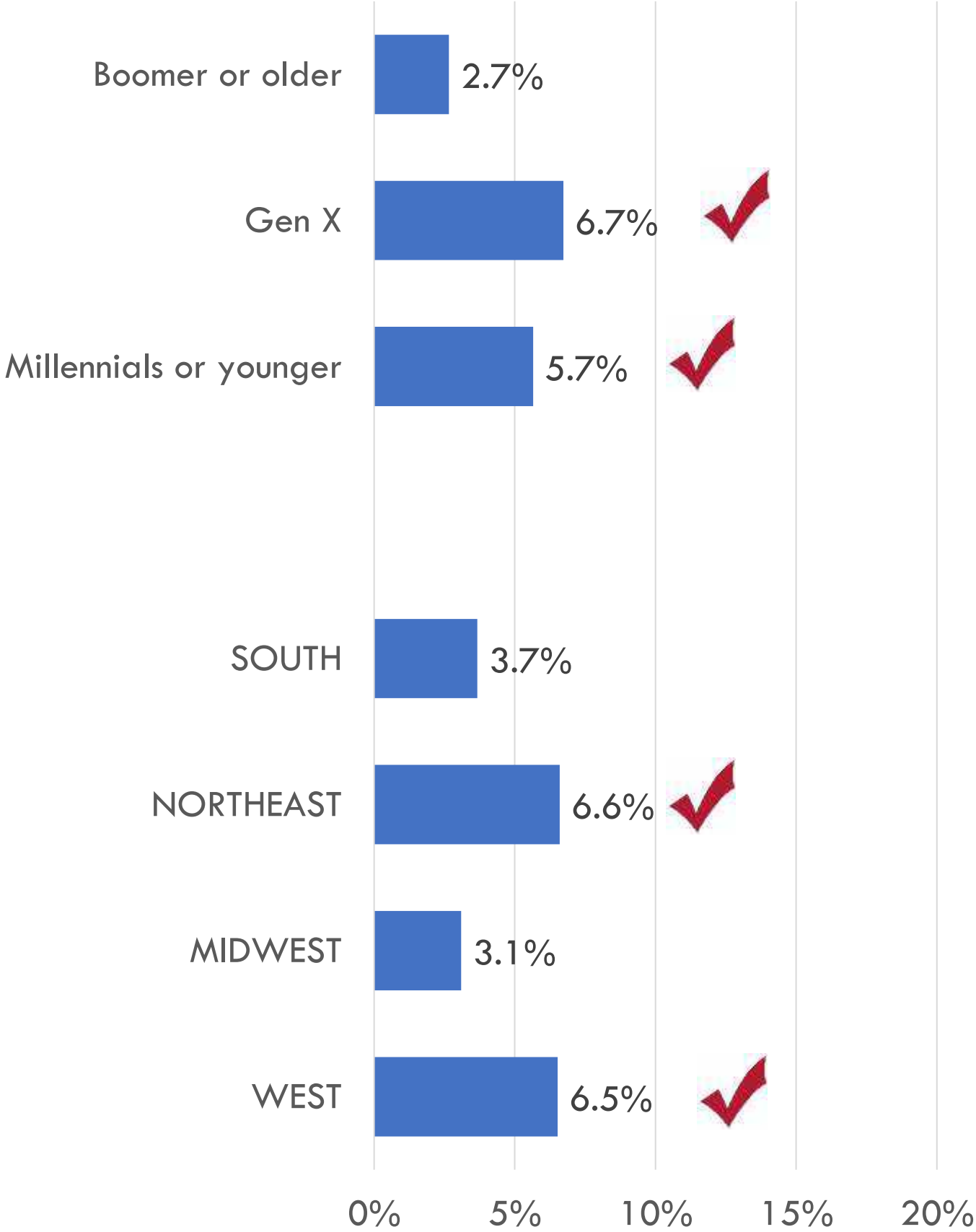


Most Desired Destinations (California)

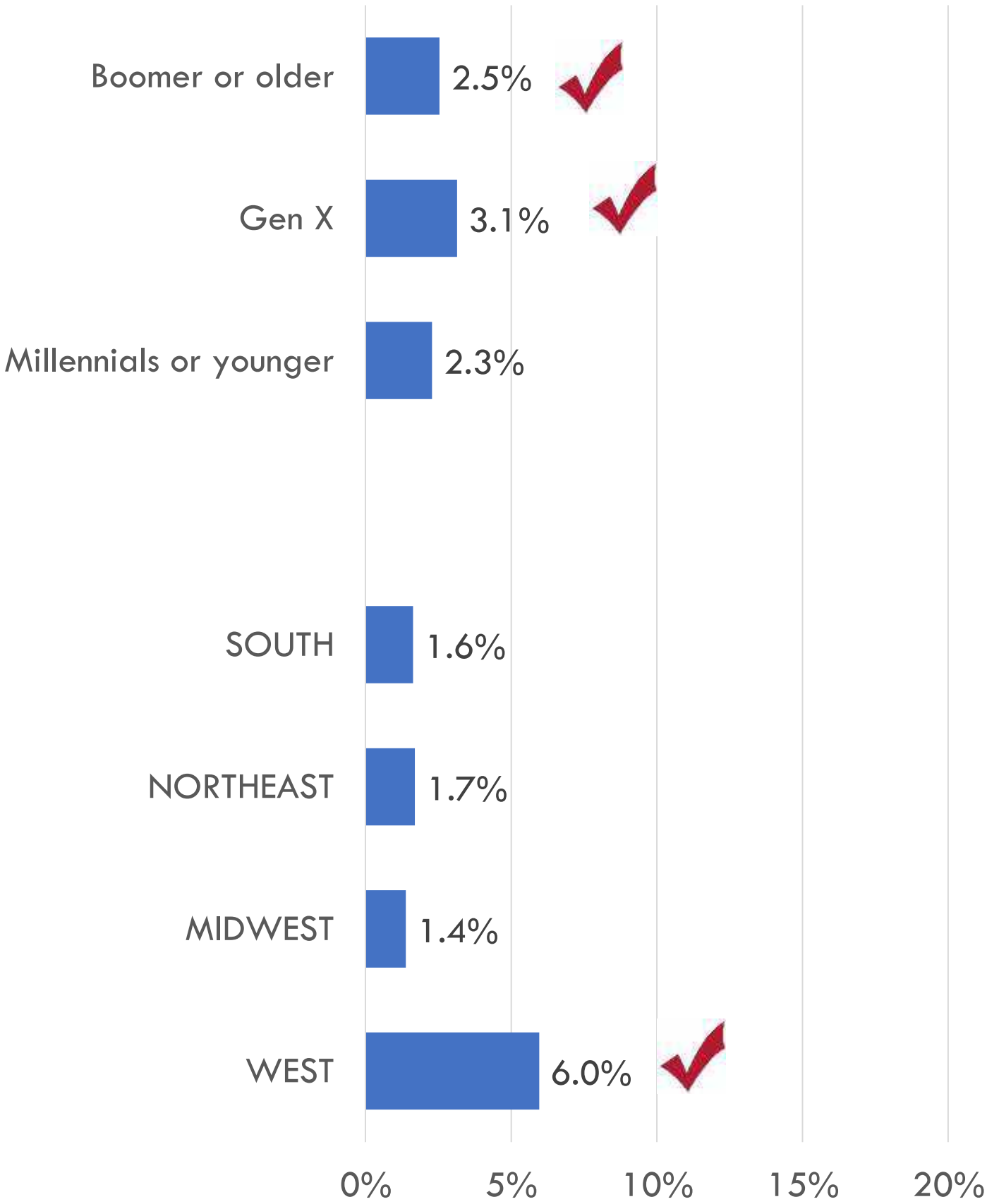
California



Los Angeles



San Francisco



Key Takeaways

- The coronavirus is still causing trip cancellations—a study high 2.3 on average
- There is an uptick in Americans having at least tentative travel plans for the remainder of 2020
- Americans are now less likely to agree that the types of travel destinations they choose will change after the pandemic and that they will avoid several travel experiences
- The larger impact of the pandemic can be seen on destination aspiration, with outdoor-oriented places joining the typically most popular



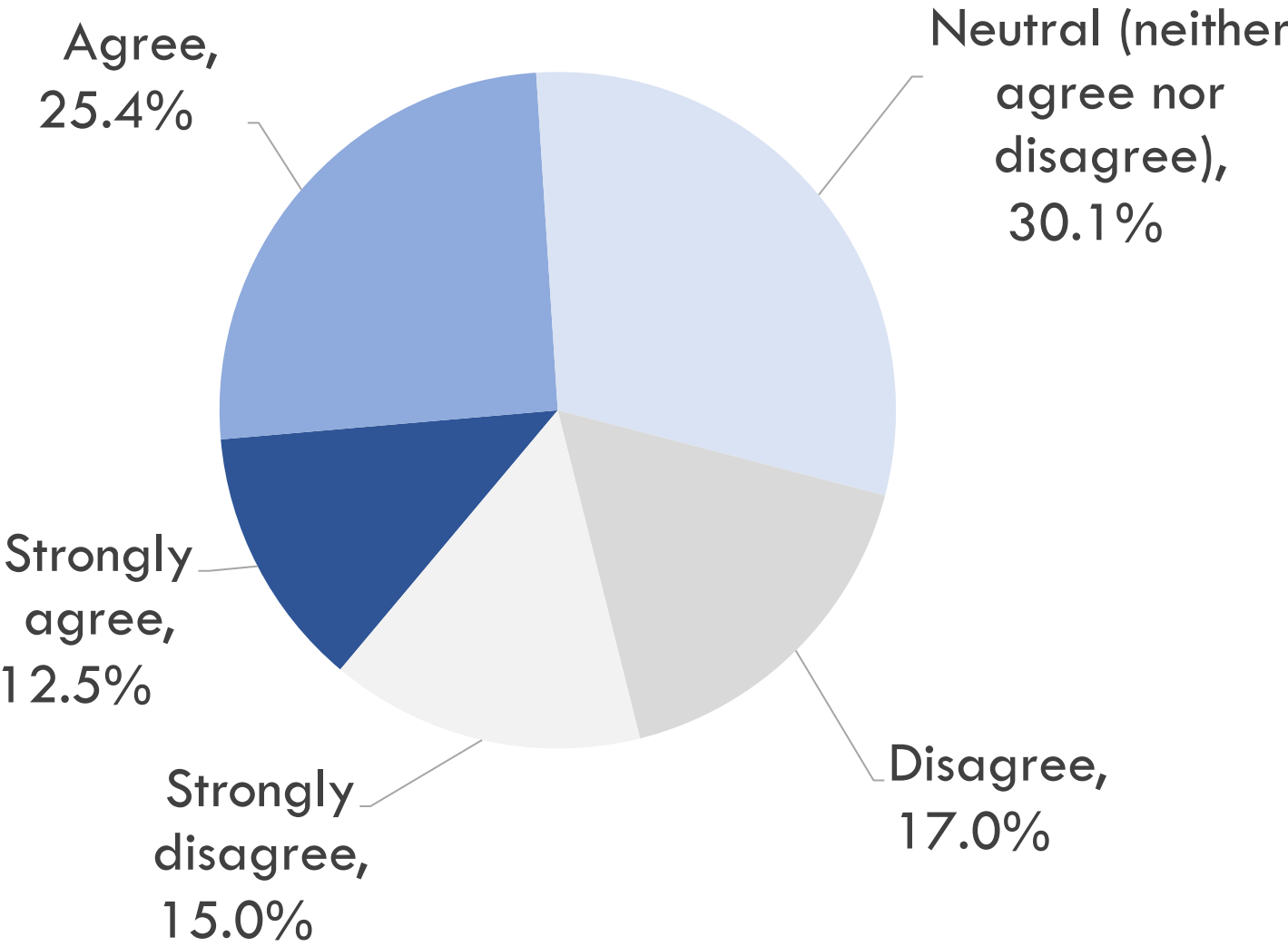
The Appeal of Travel Discounts



Discounts and Price Cuts

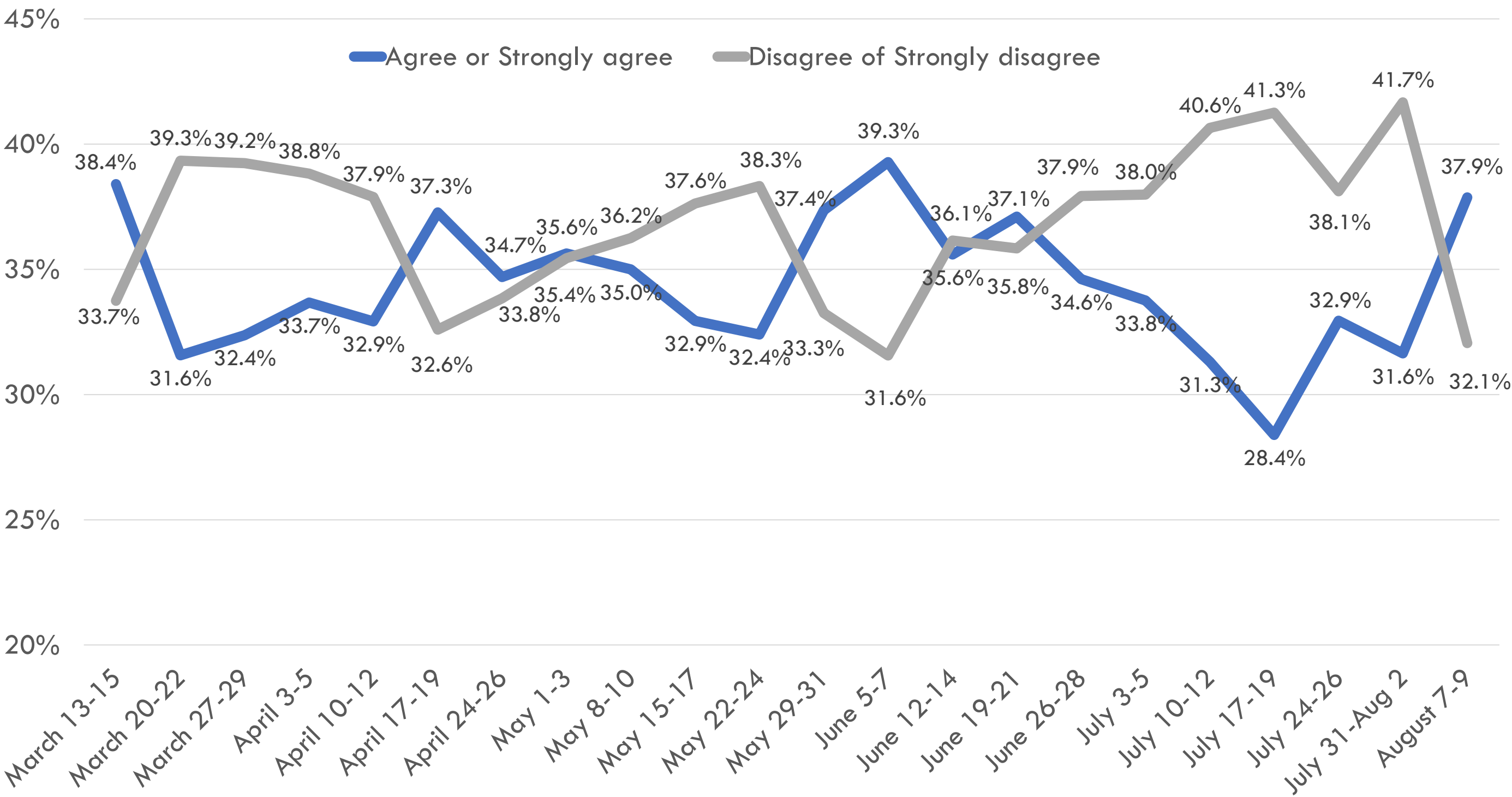
How much do you agree with the following statement?

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: 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 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

Historical data

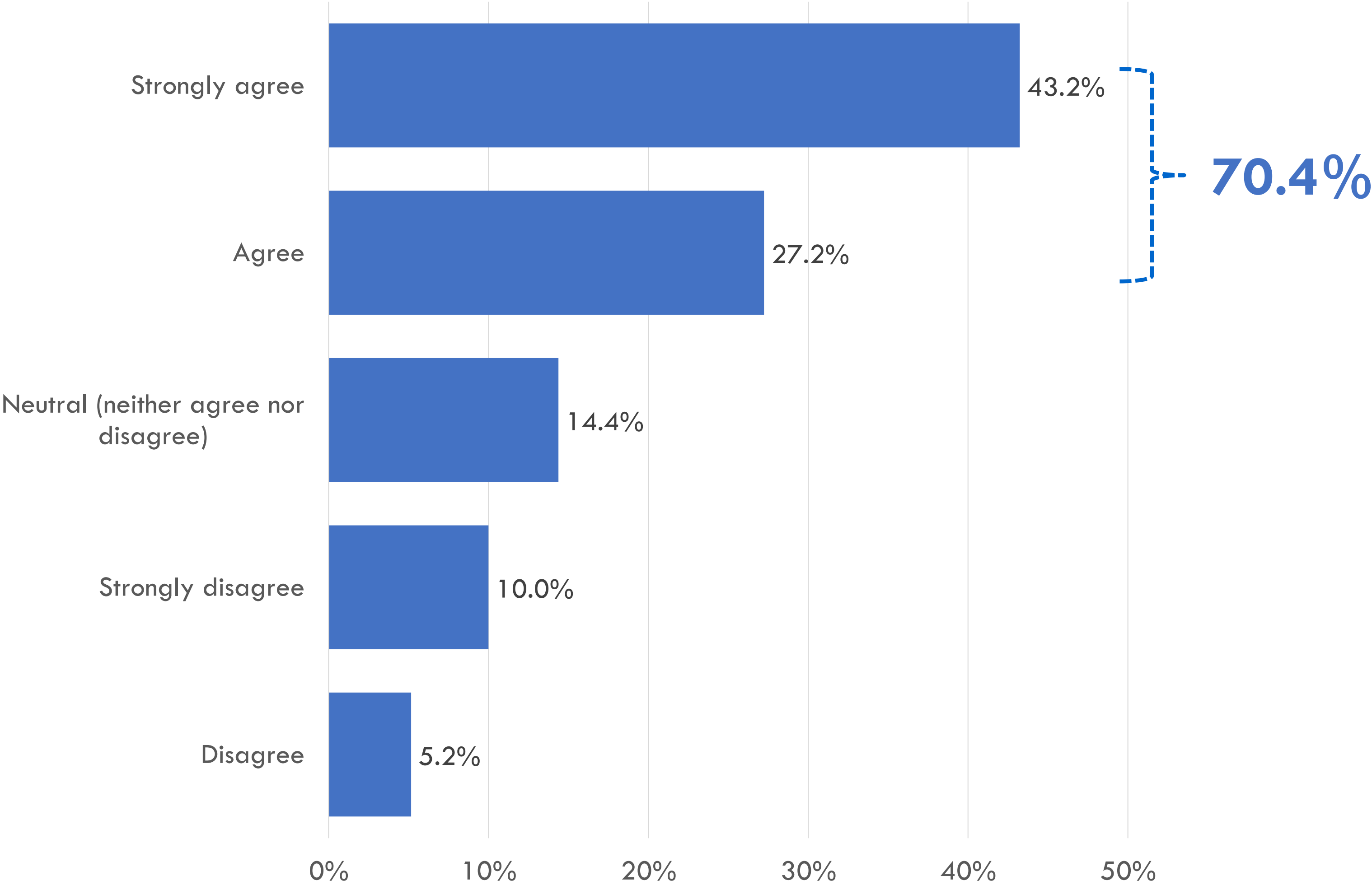


Travelers Unmotivated by Discounts Right Now: Impact of the Pandemic on Interest

Statement Agreement

Question: Because of the Coronavirus situation, no discount or price cut (however large) would make me more interested in traveling in the NEXT THREE (3) MONTHS.

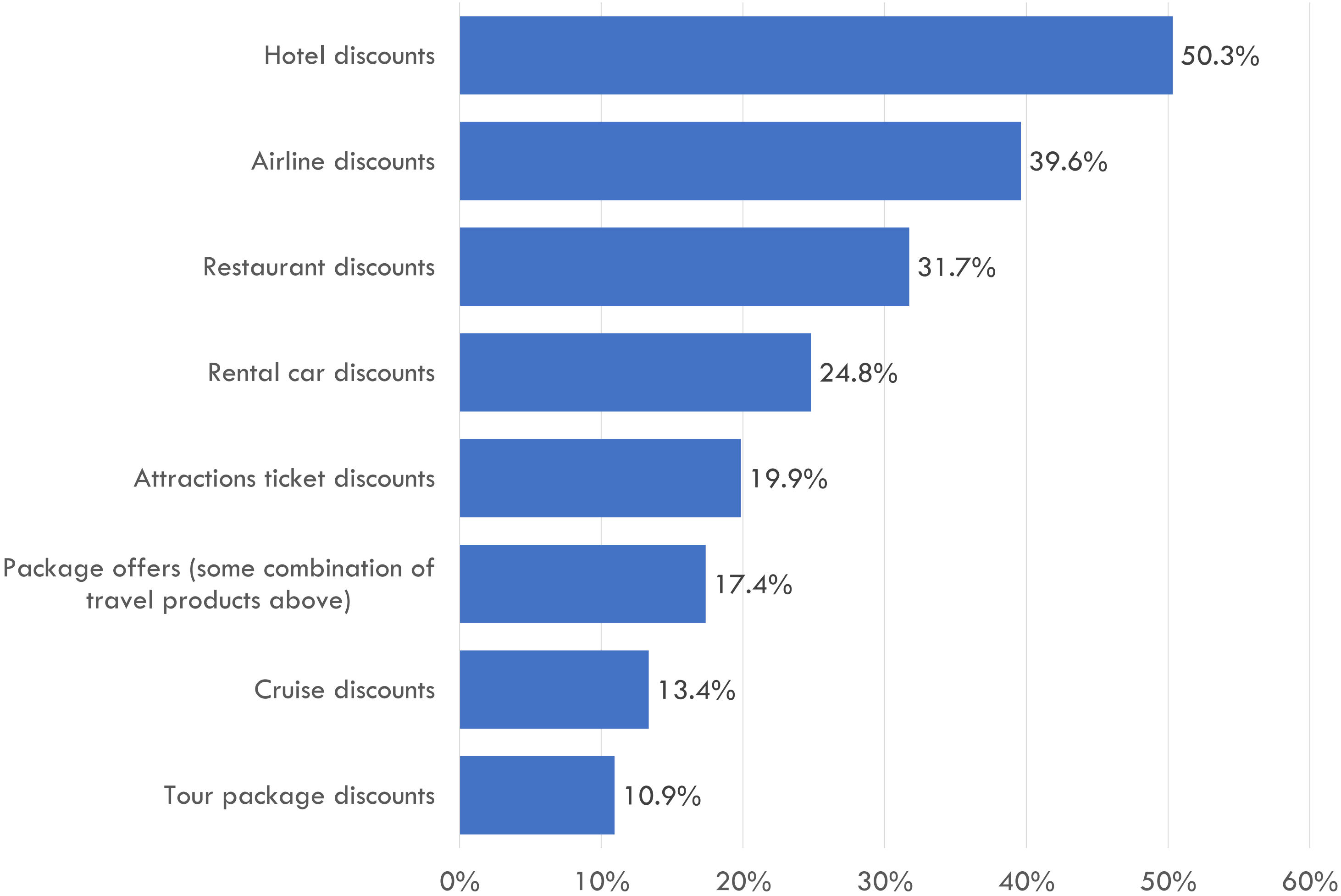
(Base: Wave 22. Respondents who would not find discounts interesting in the next 3 months, 391 completed surveys. Data collected August 7-9, 2020)



Travel Discount Types Used

Question: In the PAST TWO (2) YEARS, which of the following types of discounts have you used while traveling? (Select all that apply)

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)



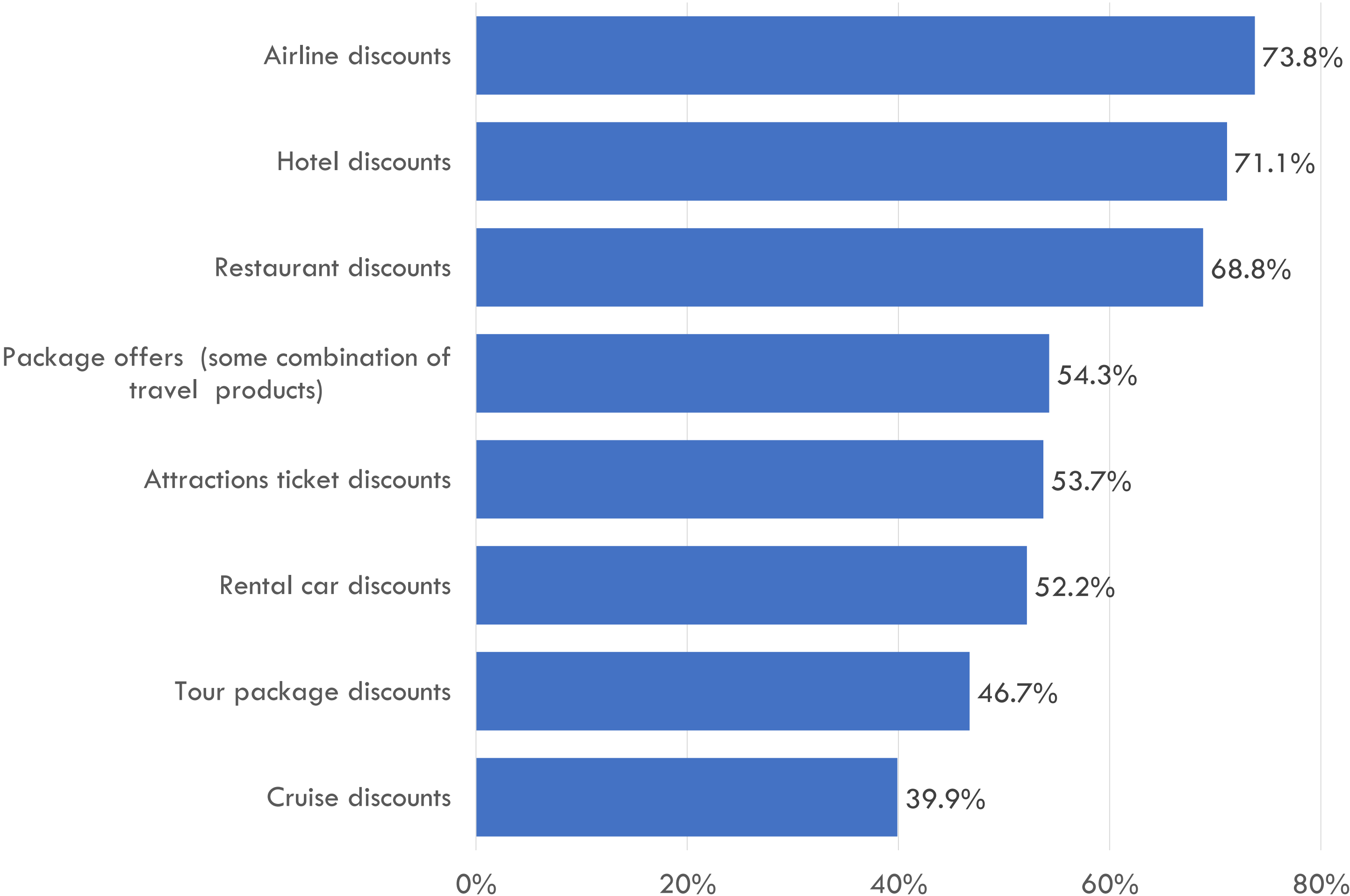
Appeal of Different Travel Discounts

Question: In general, how appealing do you find each of the following types of discounts? (For each, use the scale to fill in the blank)

This type of discount is generally

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)

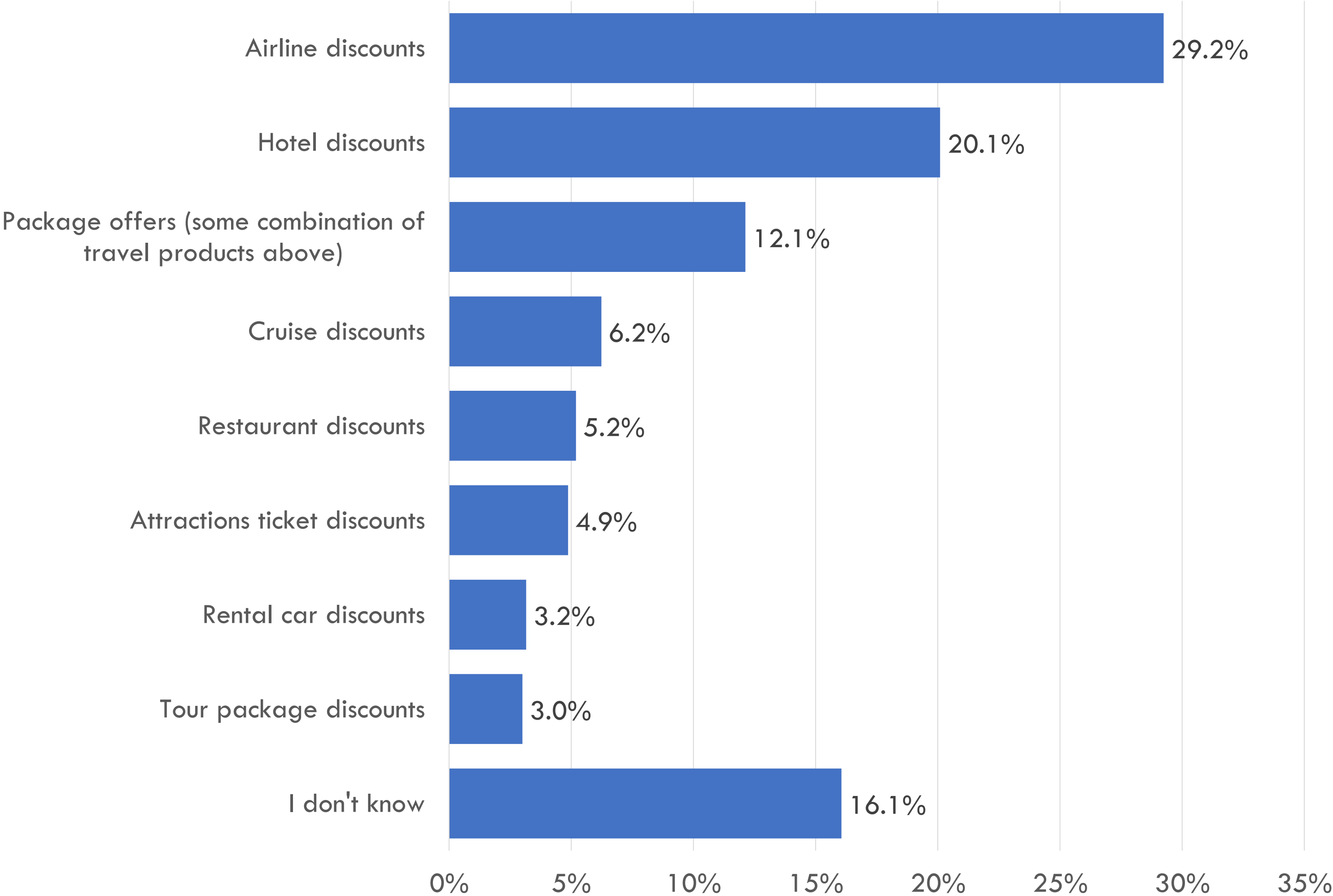
Top Two-Box Score (% Appealing or Very appealing)



Highest Value Travel Discounts

Question: Which ONE TYPE OF DISCOUNT would you generally say offers the highest value? (Select one)

(Base: Wave 22 data. All respondents, 1,201 completed surveys. Data collected August 7-9, 2020)



Key Takeaways

- The pandemic makes discounts as a travel motivator more complicated. There are some travelers who no amount of discount is going to get them to travel
- Comparing the use of discounts to how appealing they are highlights an opportunity for the travel industry to better match their offers to travelers desires
- Airline discounts are typically viewed as the most valuable



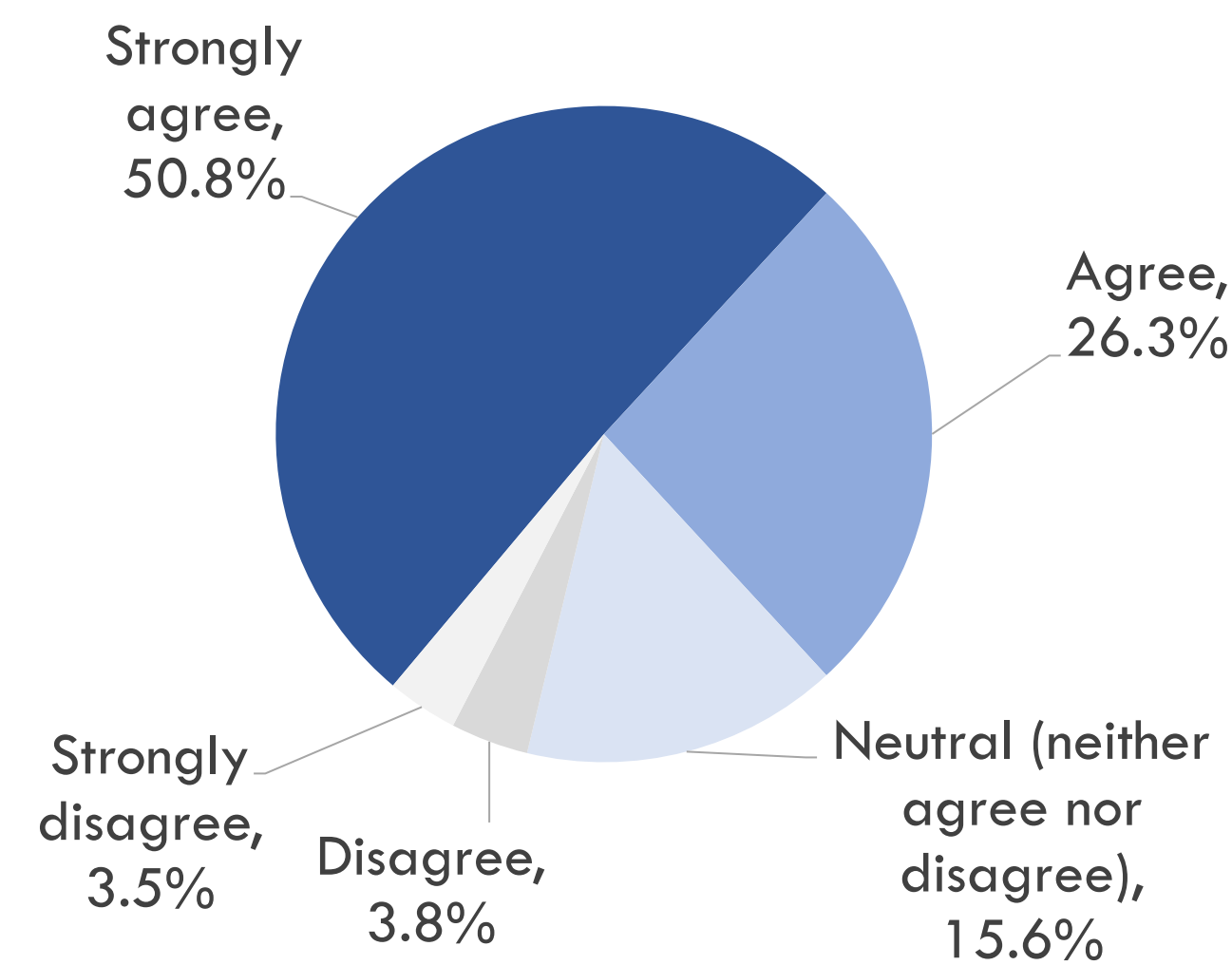
The image shows four business professionals in a modern office setting. They are silhouetted against a large window that looks out onto a bright sky, possibly at sunrise or sunset. The professionals are gathered around a small, square table. One person is standing and leaning over the table, while the others are seated. The floor is highly reflective, creating a clear mirror image of the people and the table. The overall atmosphere is professional and collaborative.

Returning to Meetings & Events

Avoiding Conventions & Conferences

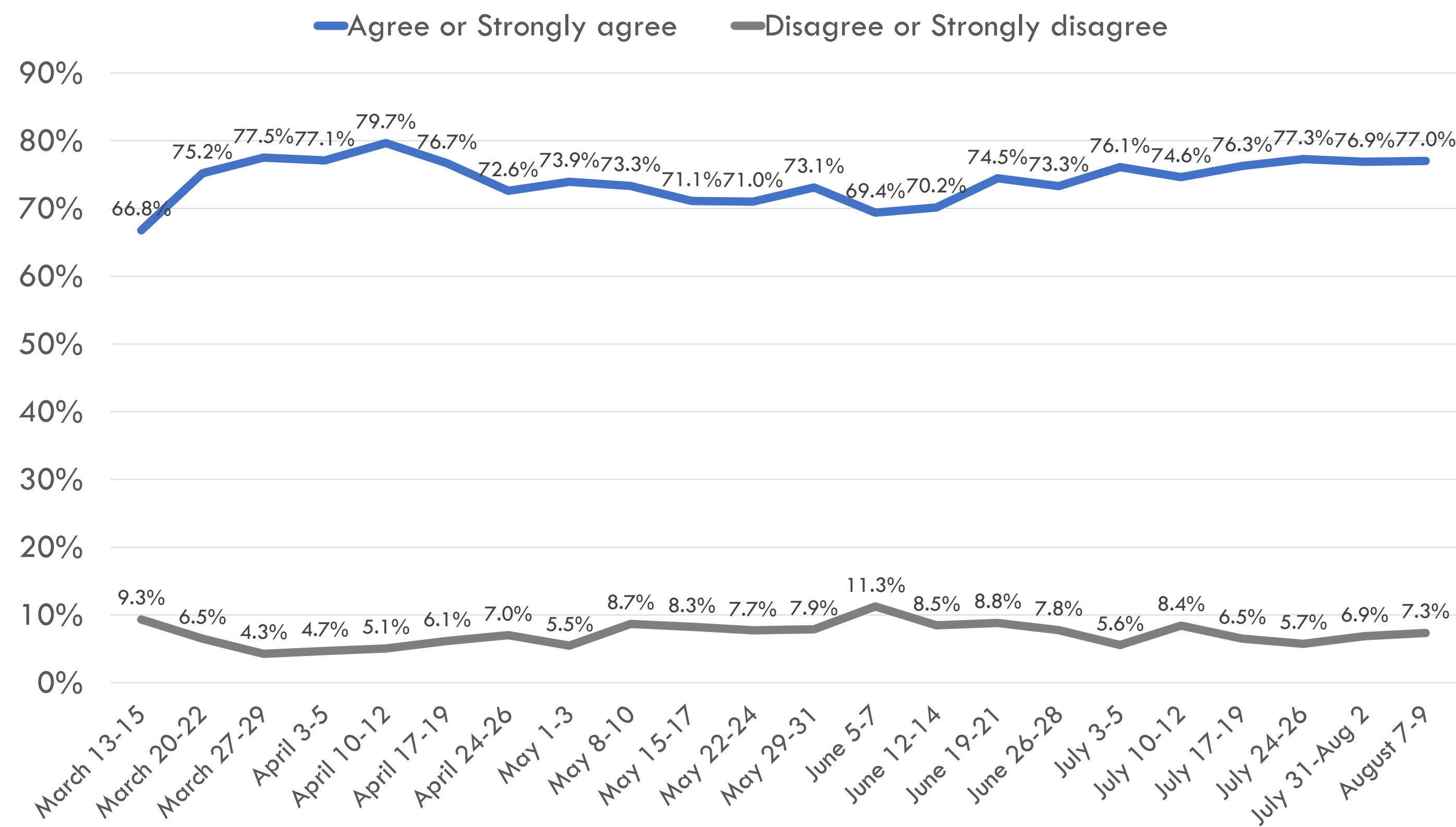
How much do you agree with the following statement?

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



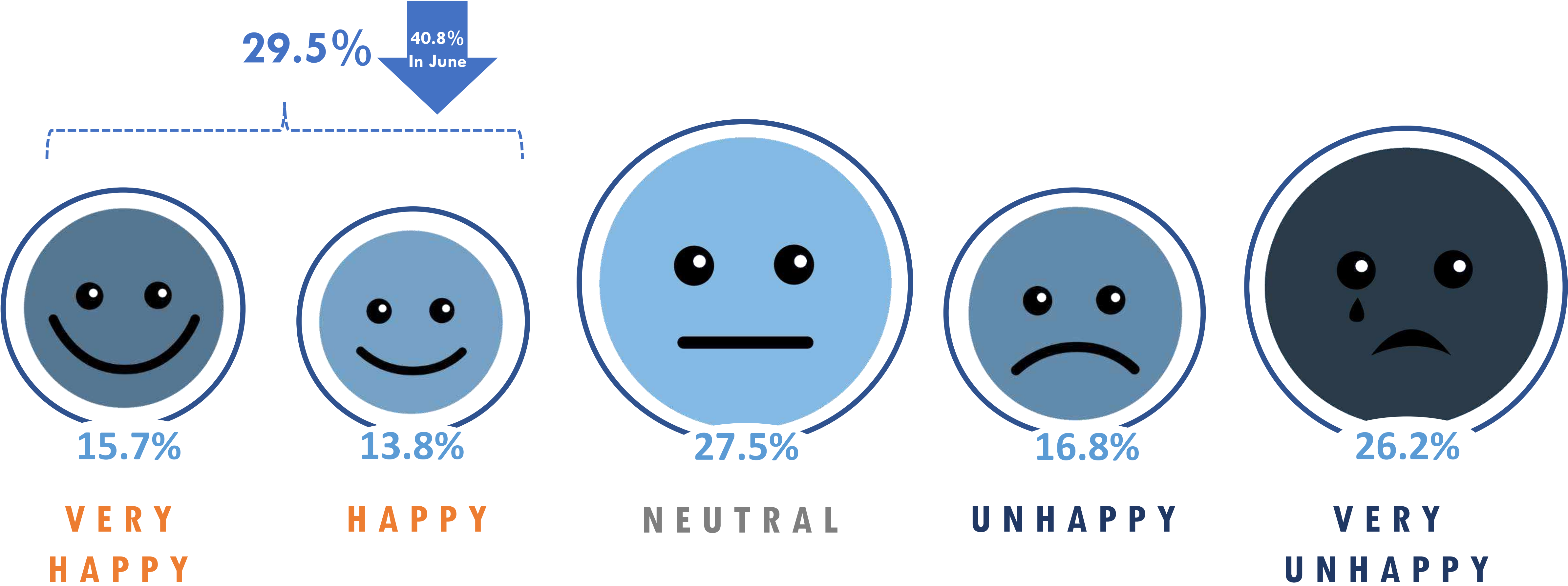
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224 and 1,201 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, 31-August 2 and 7-9, 2020)

Historical data



Convention Travelers: Response to Being Asked to Attend a Convention This Fall

Question: How would you feel if you were asked to attend a conference, convention or group meeting sometime this Fall?

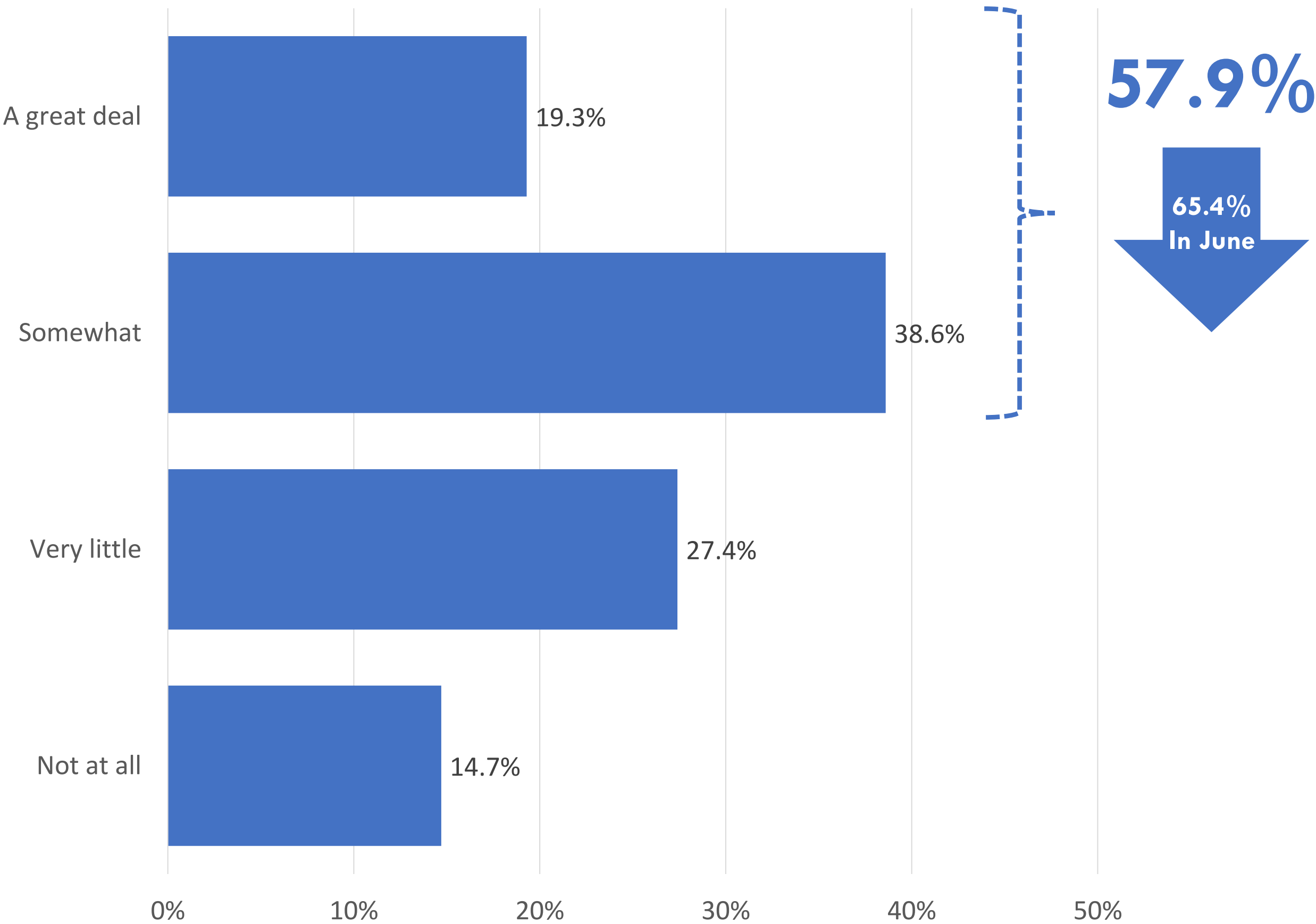


Convention Travelers: Trust in Other Attendees

Question: Suppose you were to attend a conference or convention sometime in the next year.

In general, how much would you trust your fellow attendees to conduct themselves appropriately, doing what they can to protect other attendees from exposure to the COVID-19 virus?

I trust my fellow attendees _____.

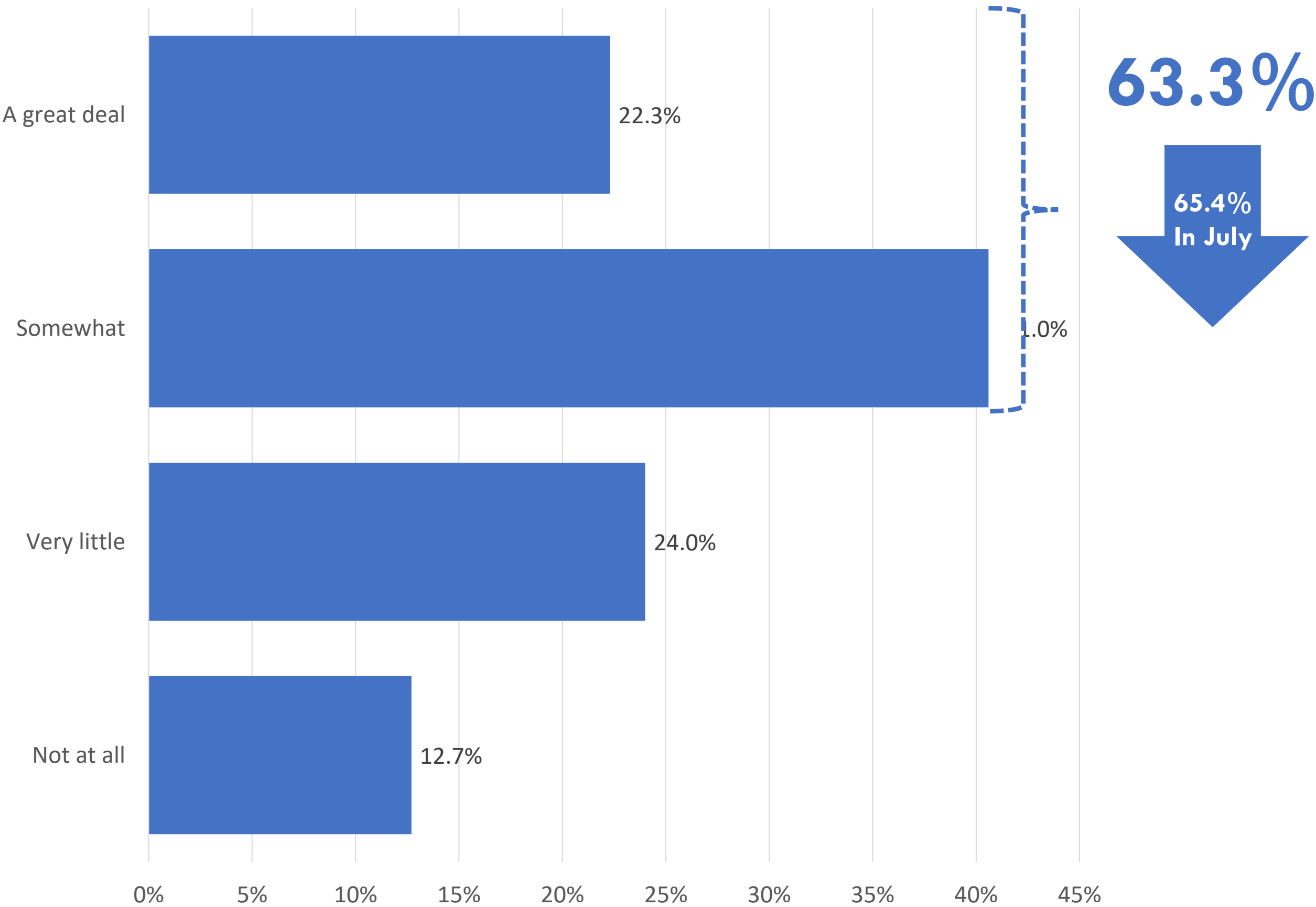


Convention Travelers: Trust in Organization Hosting the Event

Question: Suppose you were to attend a conference or convention sometime in the next year.

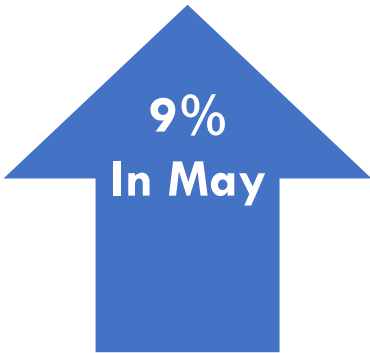
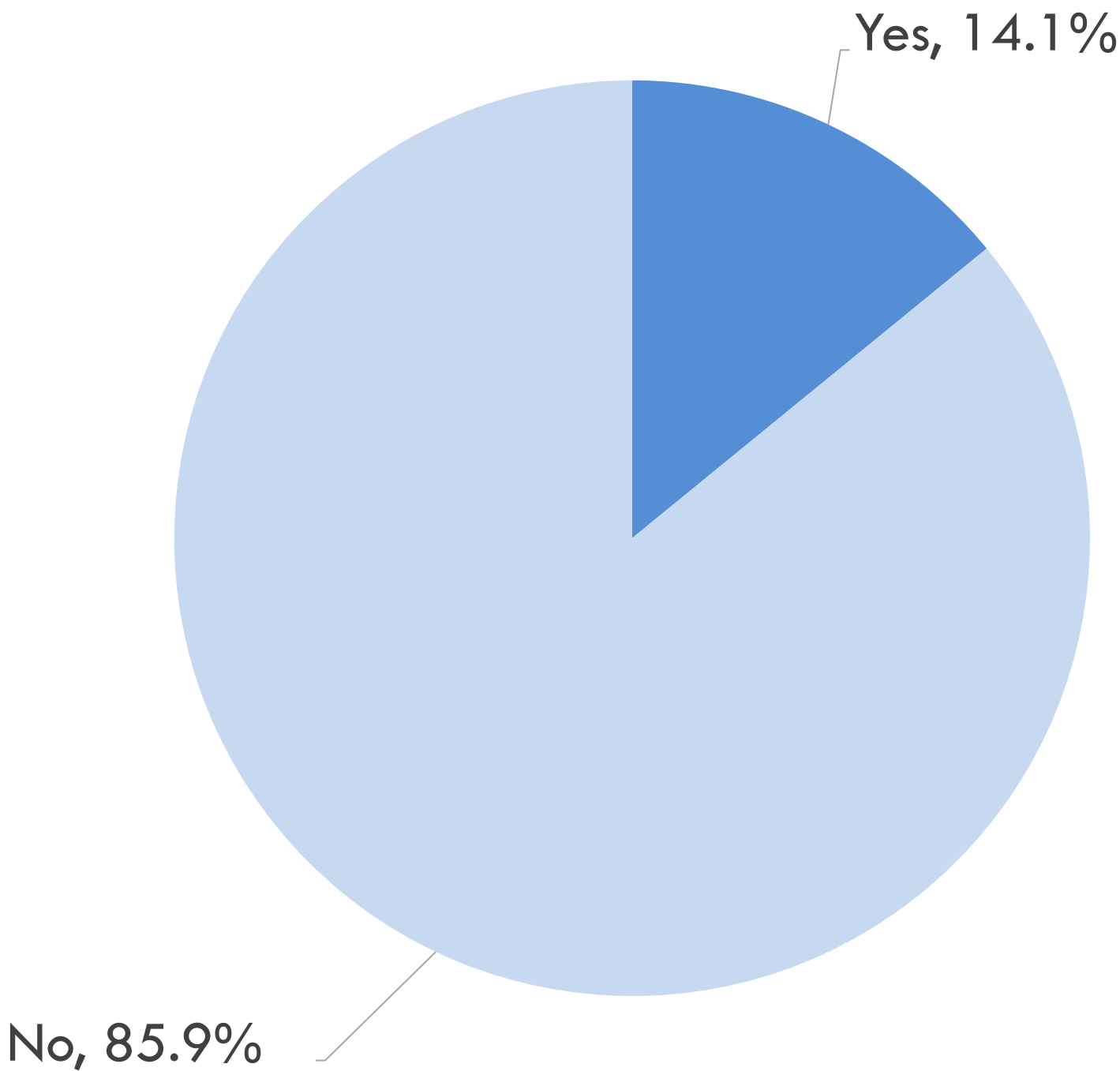
In general, how much would you trust the organization hosting the conference or convention to look out for your health?

I would trust the hosting organization _____.



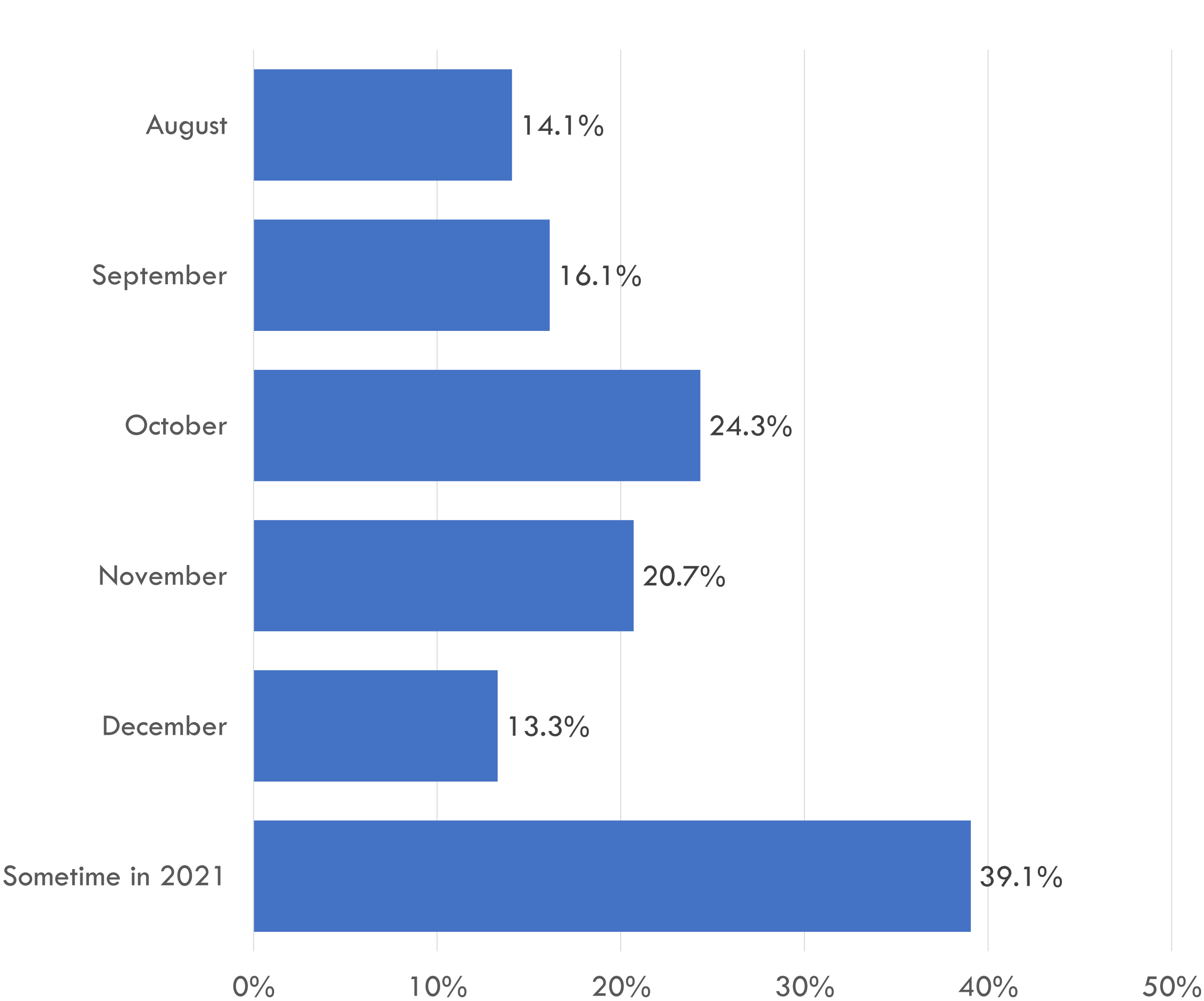
Current Plans for Group Meeting Travel

Question: Do you currently have any travel even tentatively planned for a convention, conference or other group meeting later this year (or in 2021)?



Current Plans for Group Meeting Travel

Question: Do you currently have any travel even tentatively planned for a convention, conference or other group meeting later this year (or in 2021)?



Key Takeaways

- Plans to attend conventions and conferences have grown
- Convention travelers still feel hesitation and resistance to attending to these events
- While trust in meeting organizers is at higher levels, trust in individual attendees to behave safely has lessened





Coronavirus Travel Sentiment Index

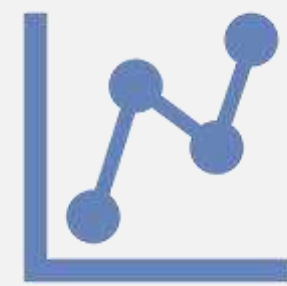
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 10th

What is a Predictive Index?



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



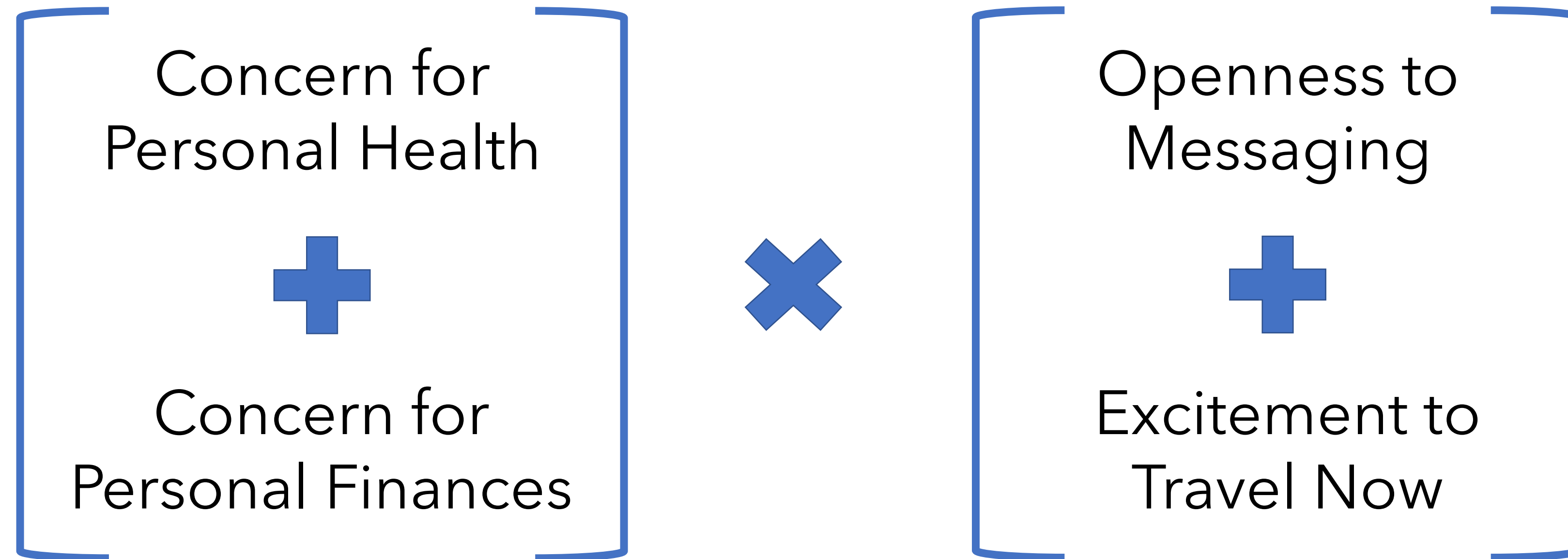
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

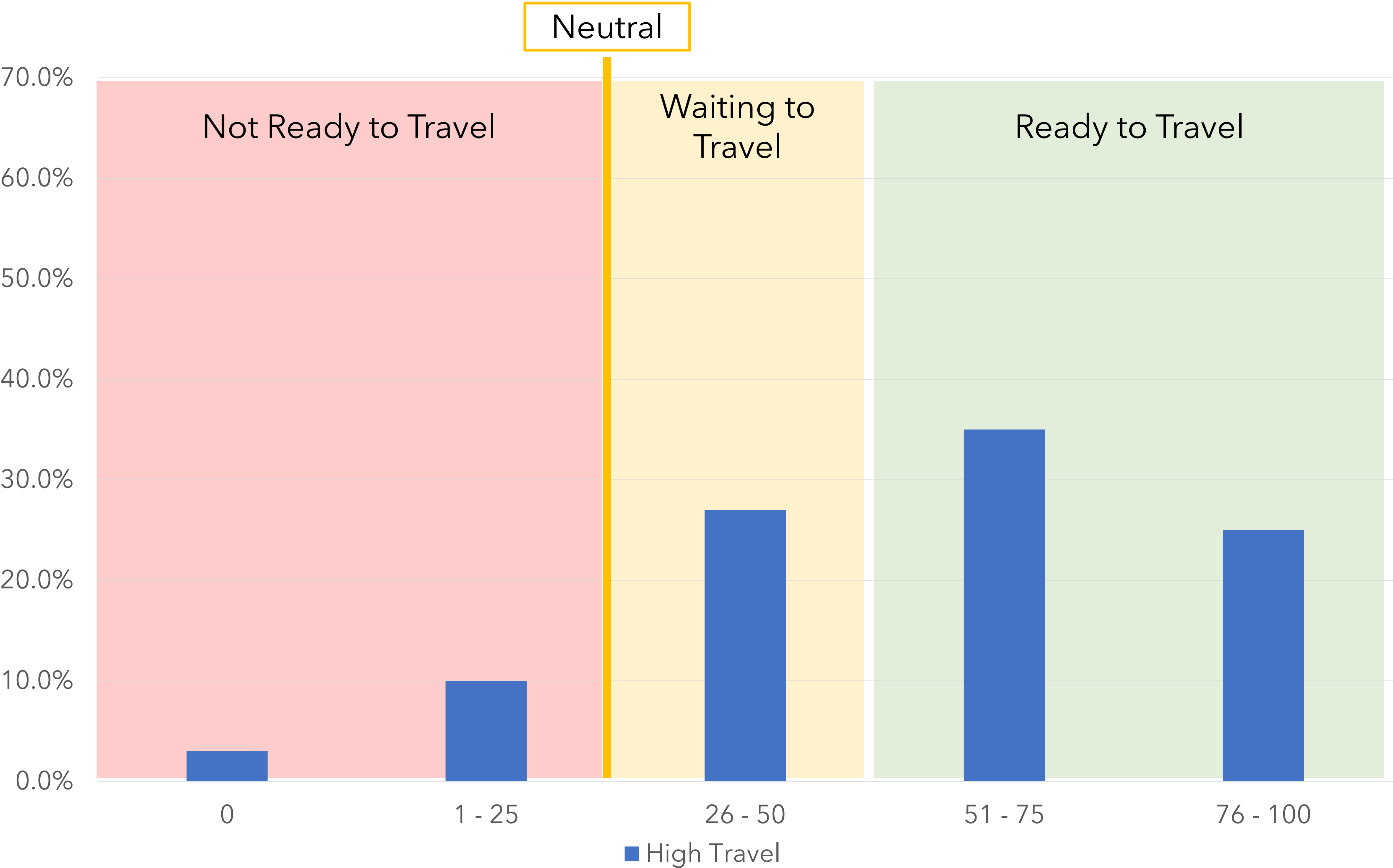
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



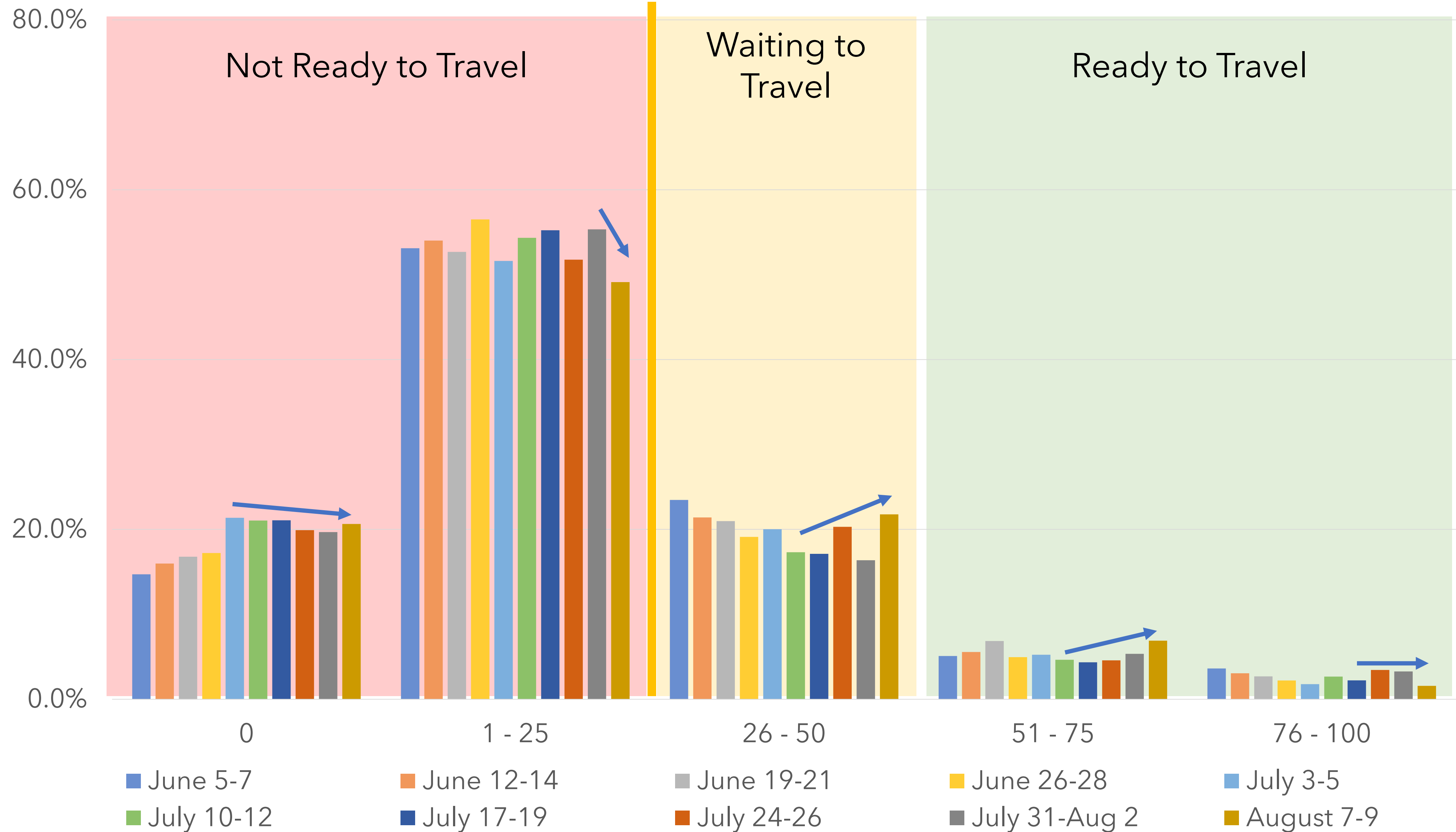
*Normalized to a 100pt scale

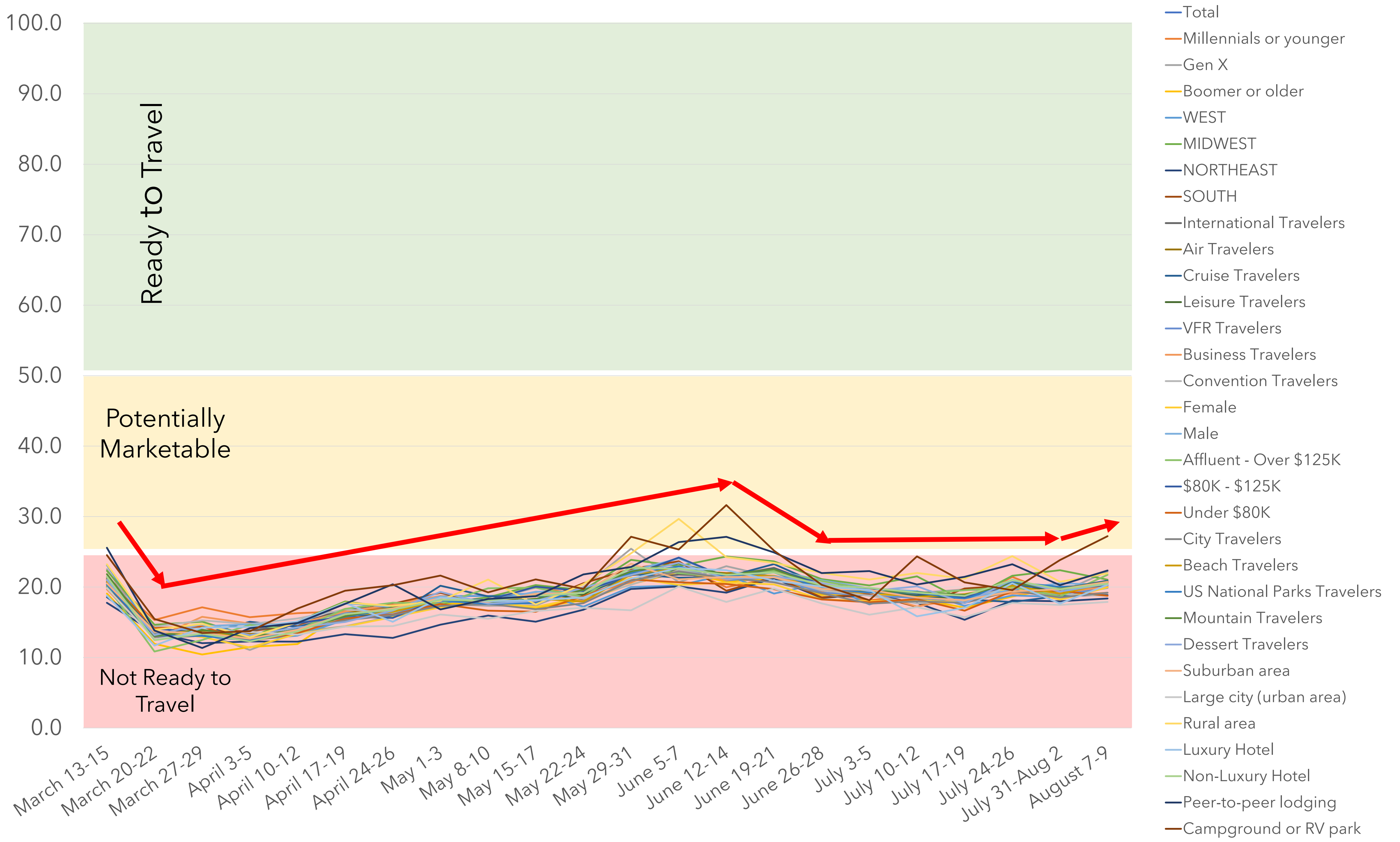
Healthy Travel Outlook

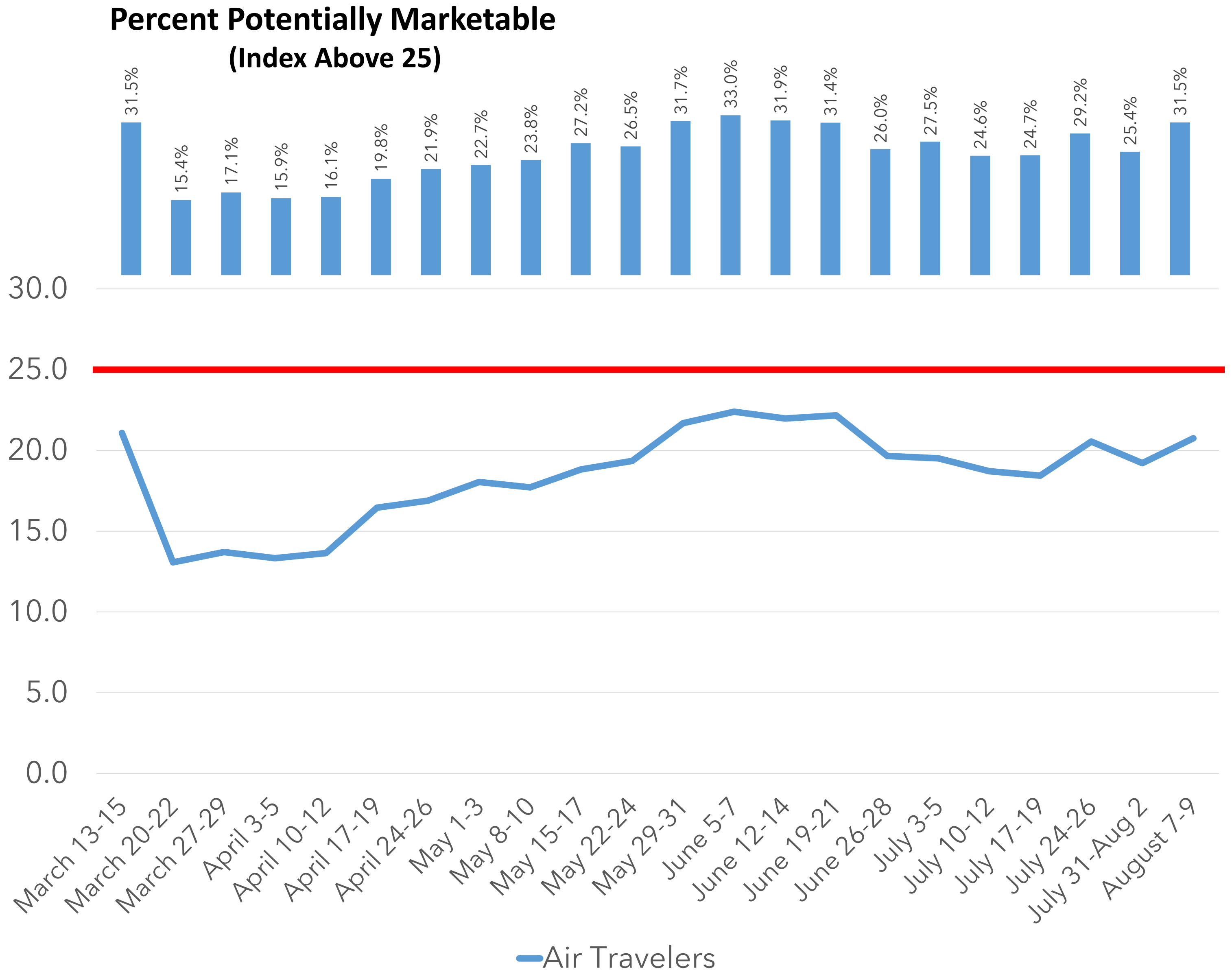
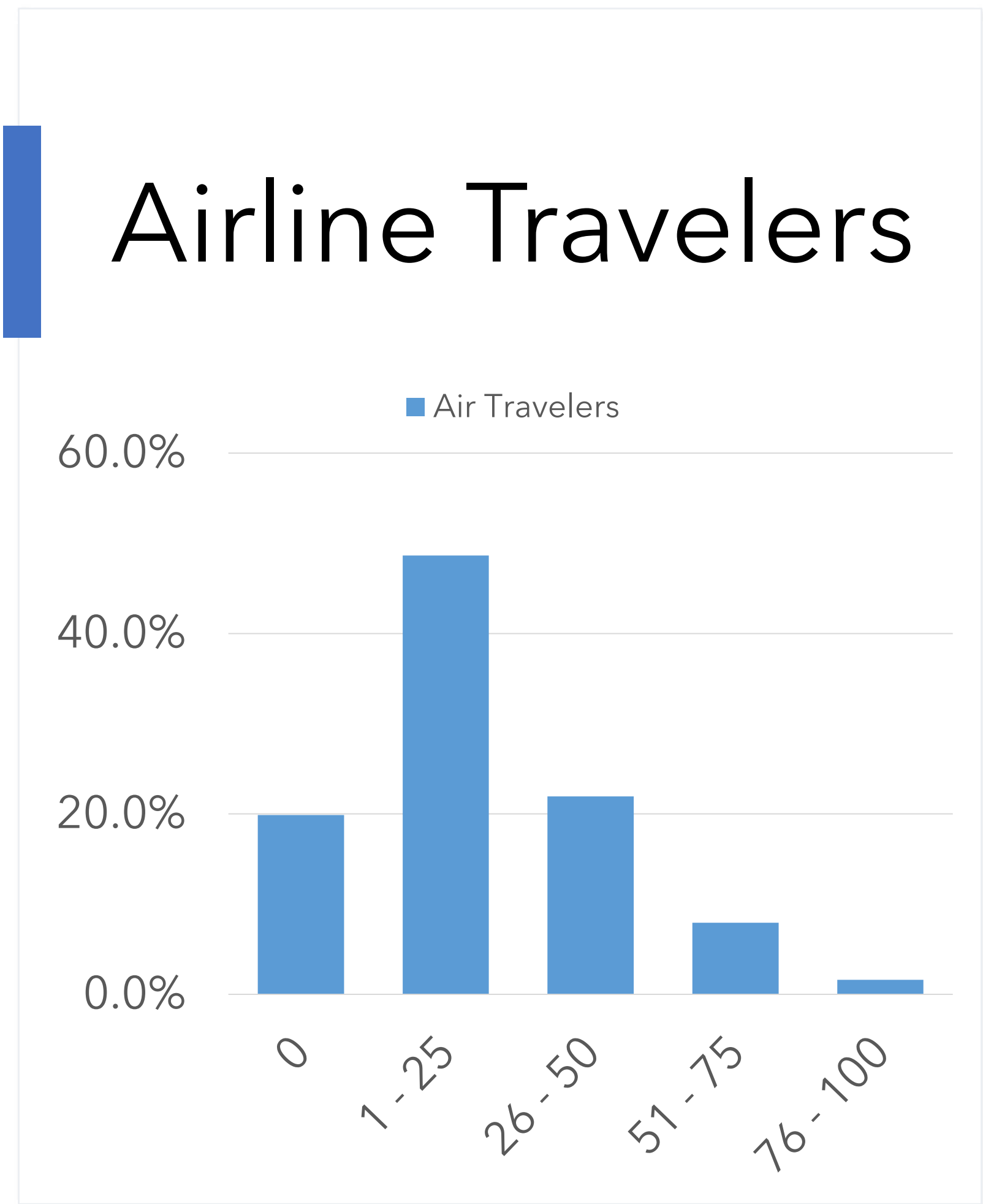


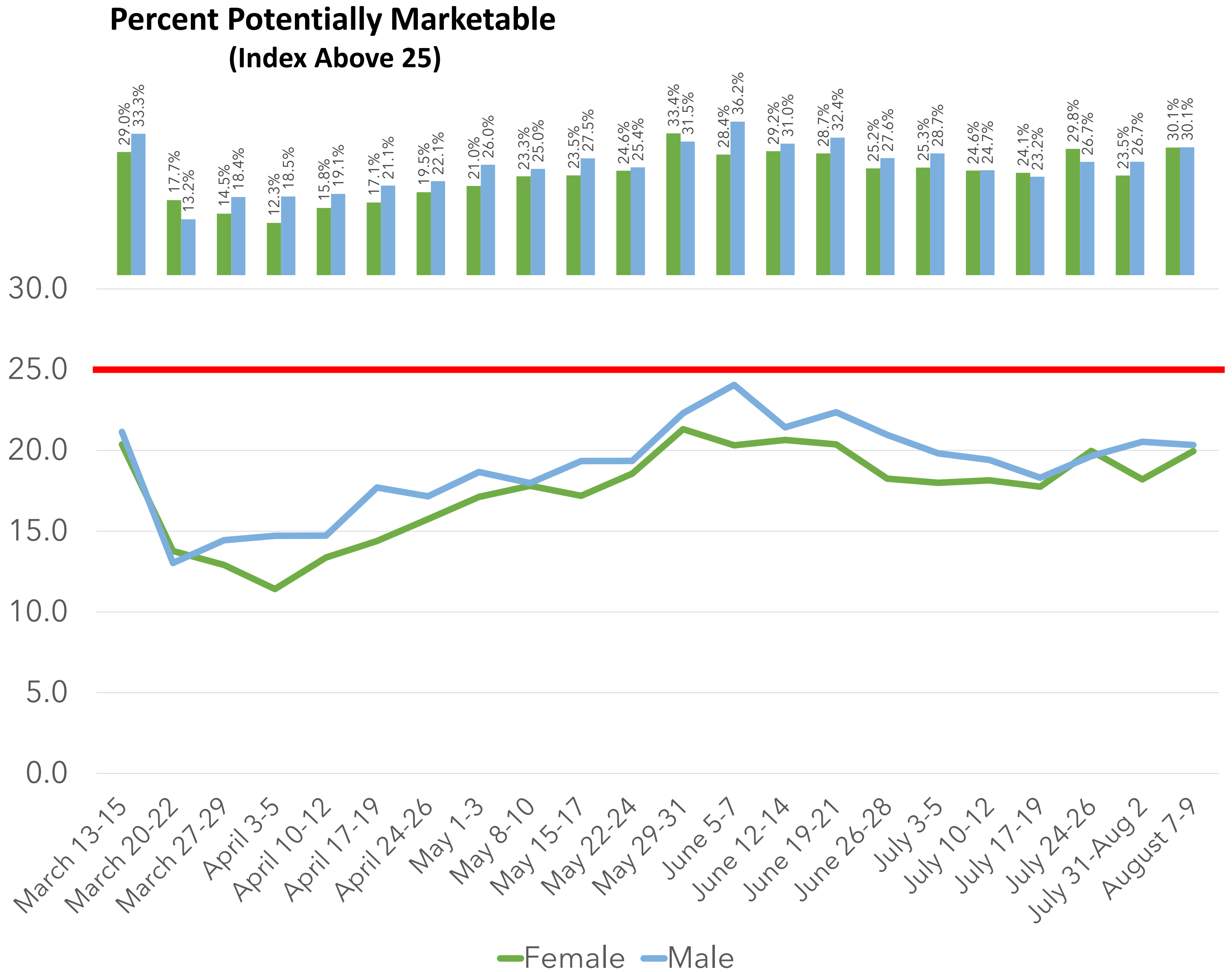
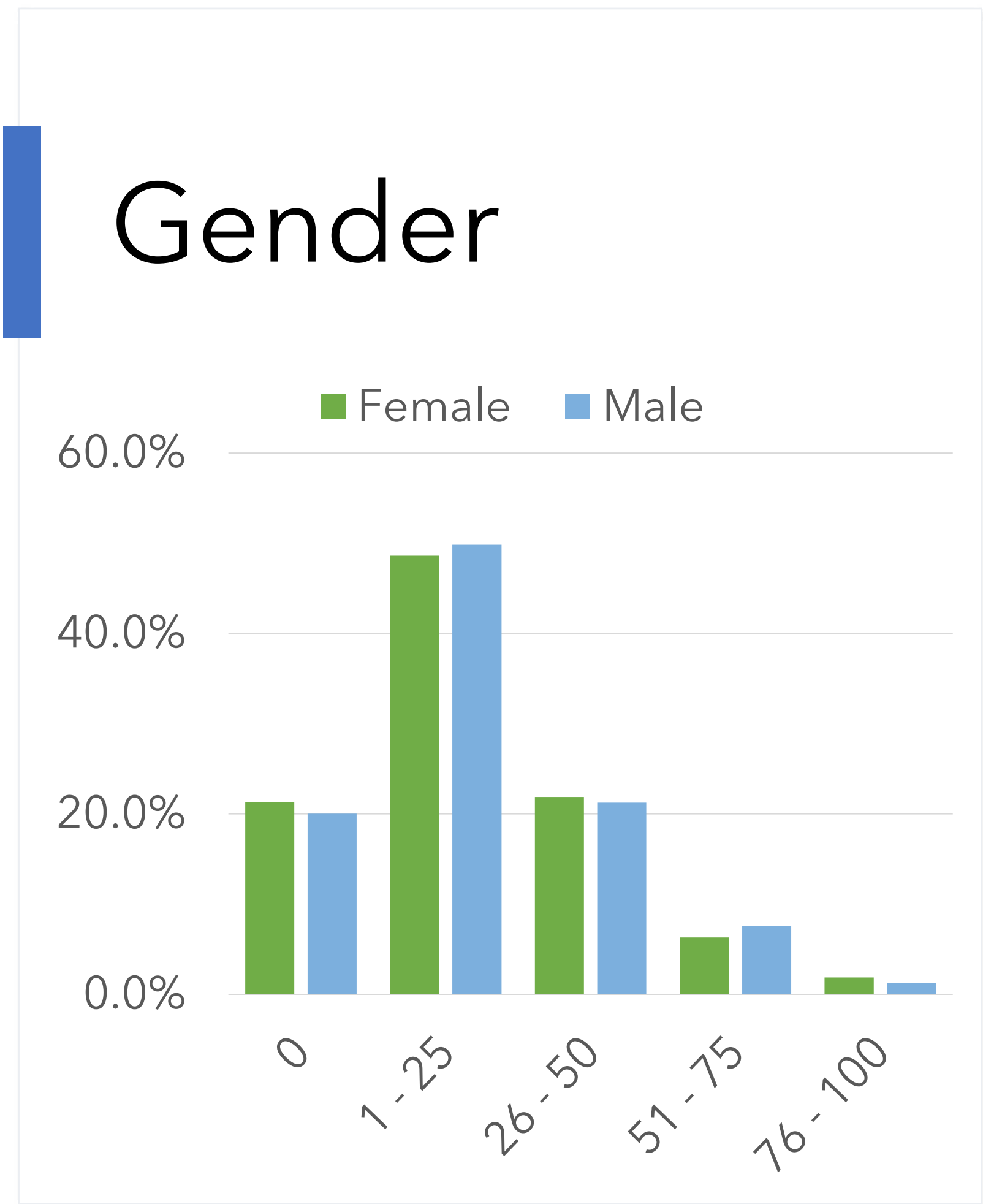
Travel Outlook

Neutral



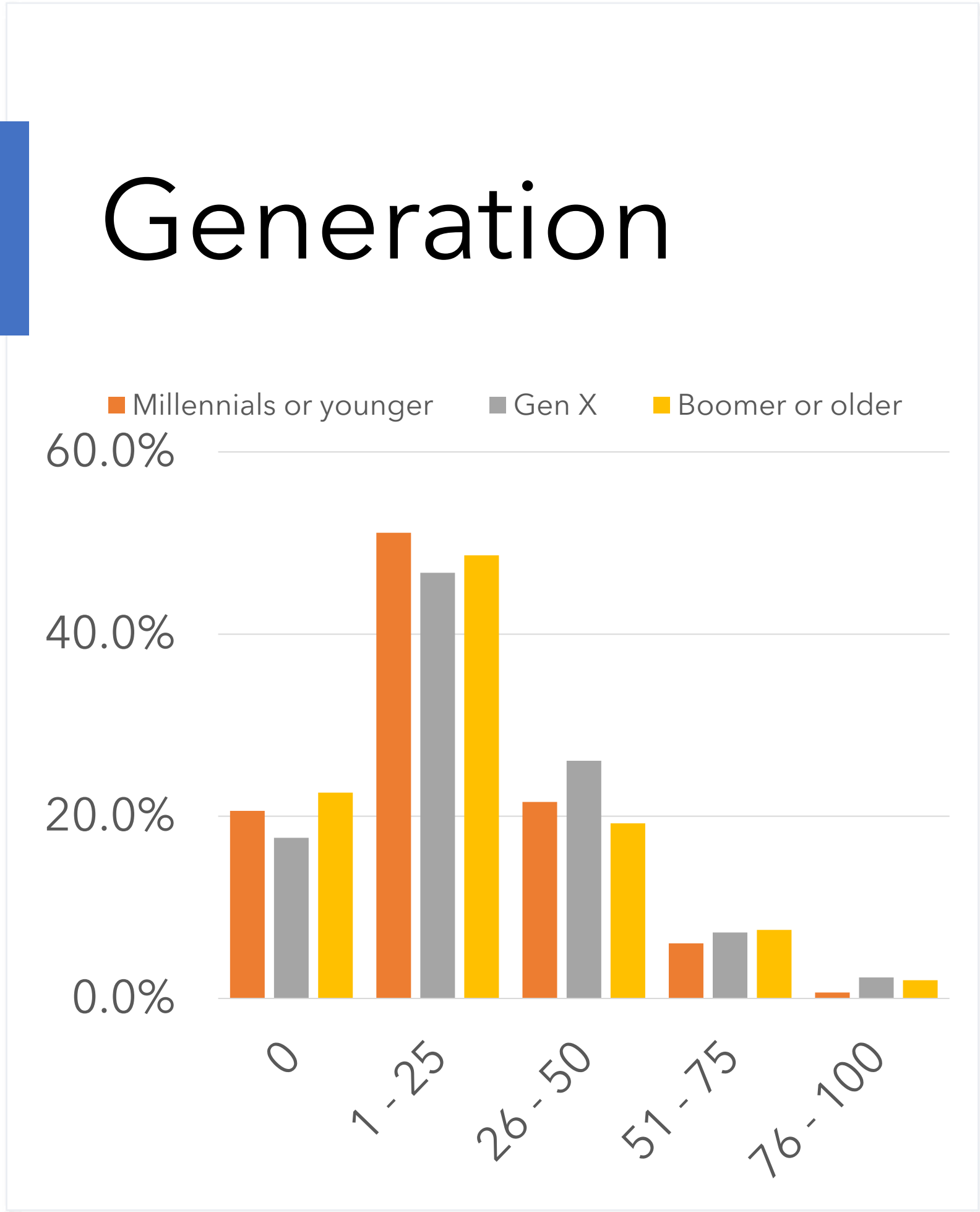




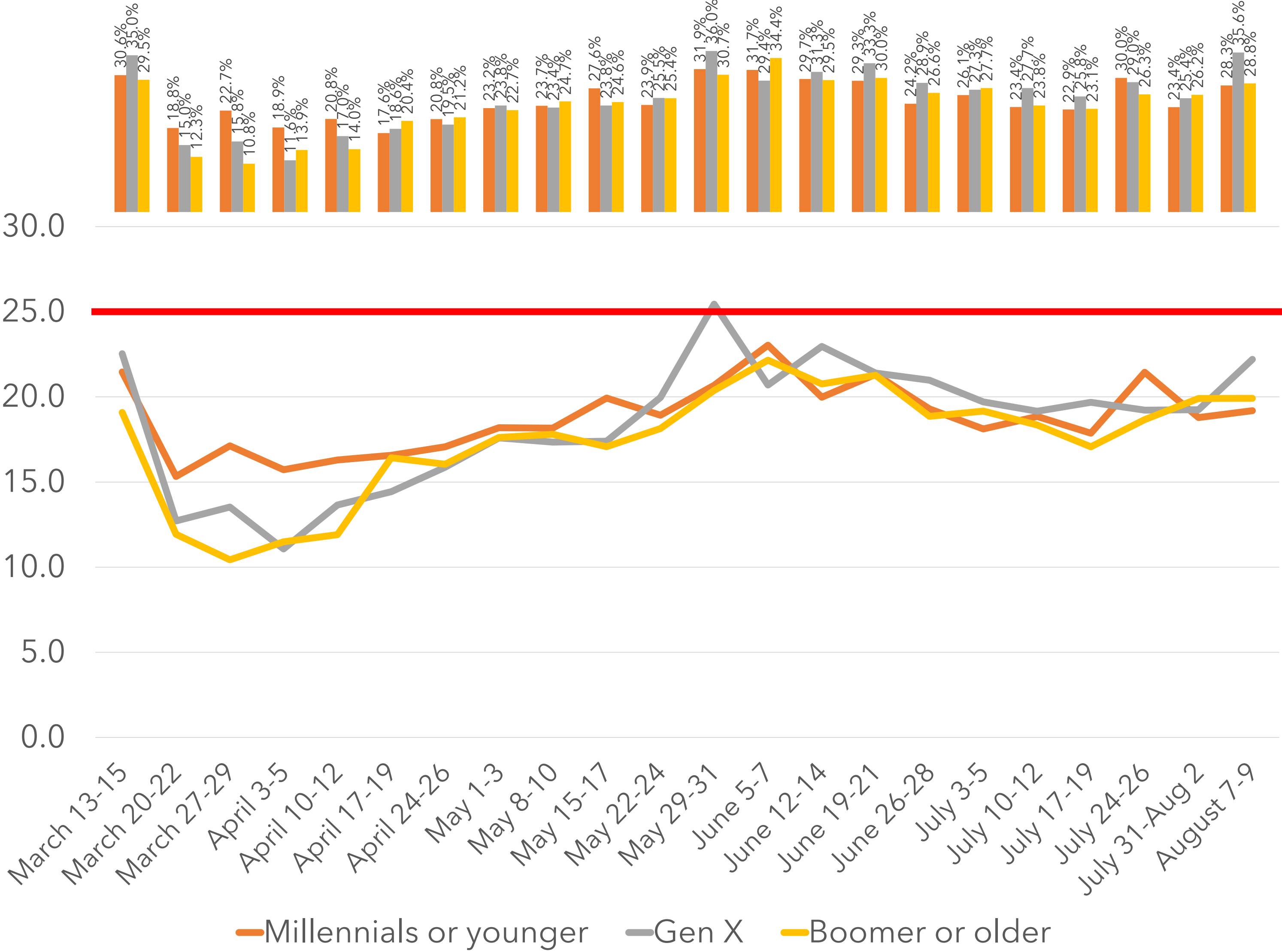




Generation

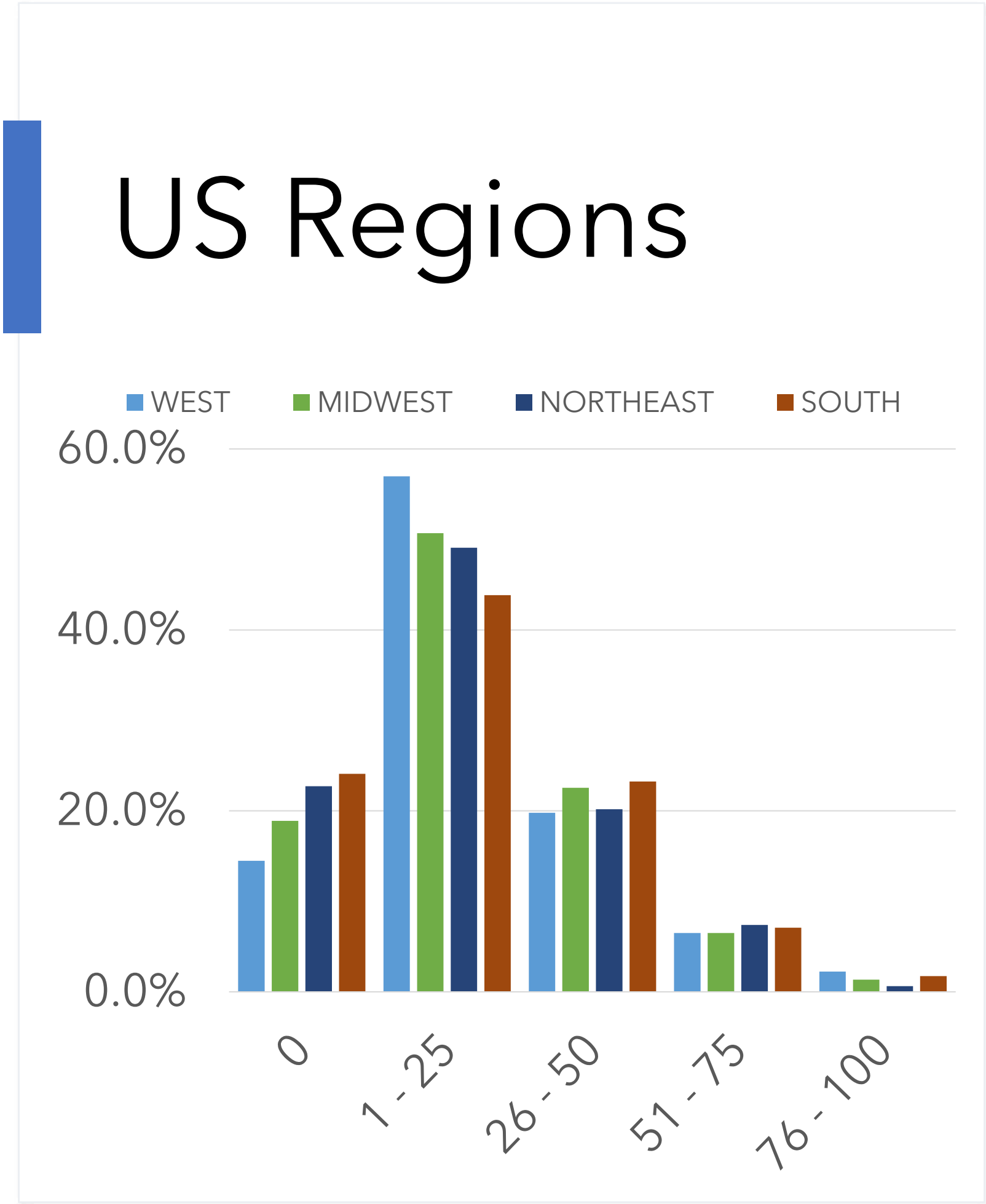


Percent Potentially Marketable (Index Above 25)

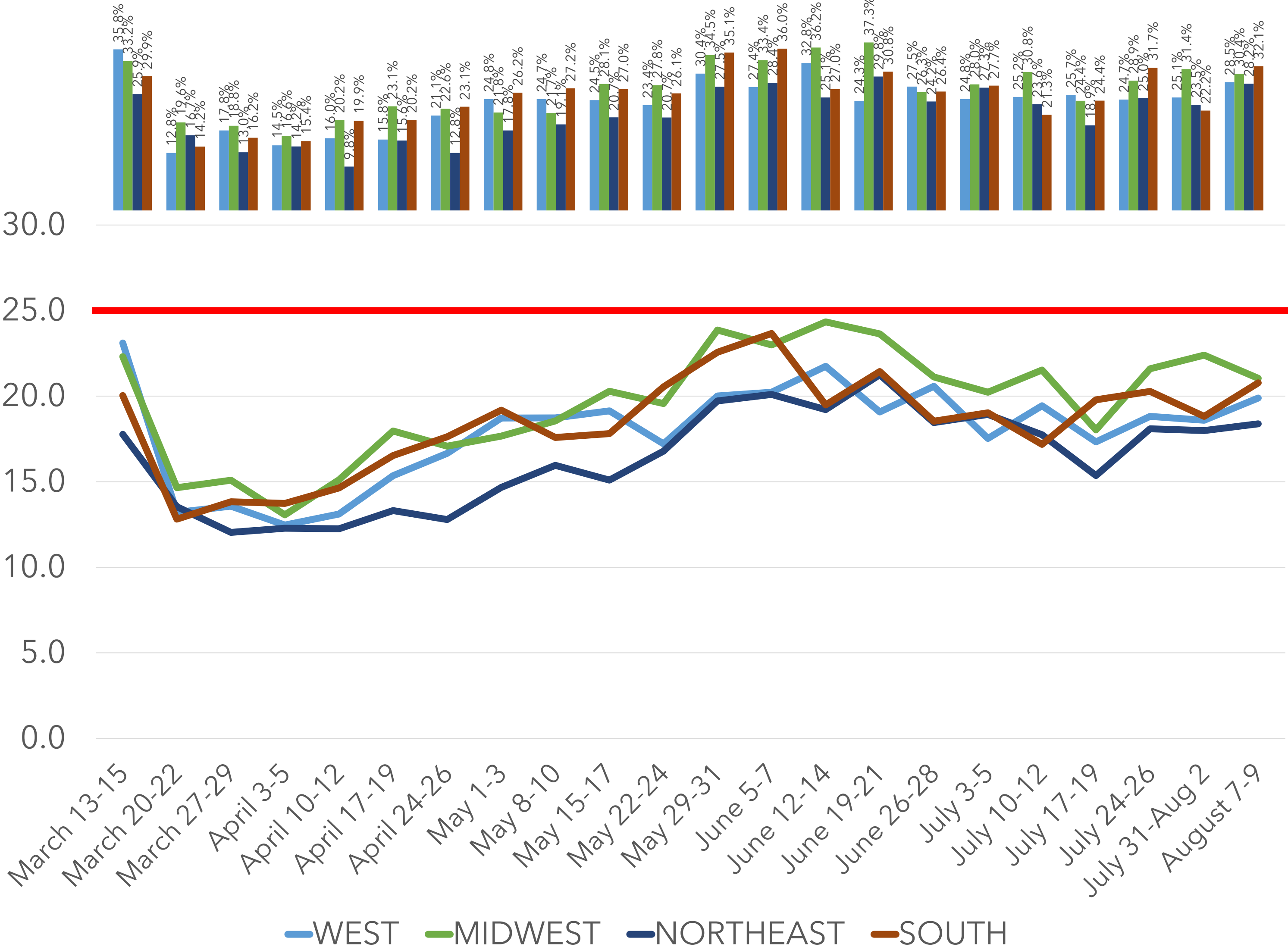




US Regions

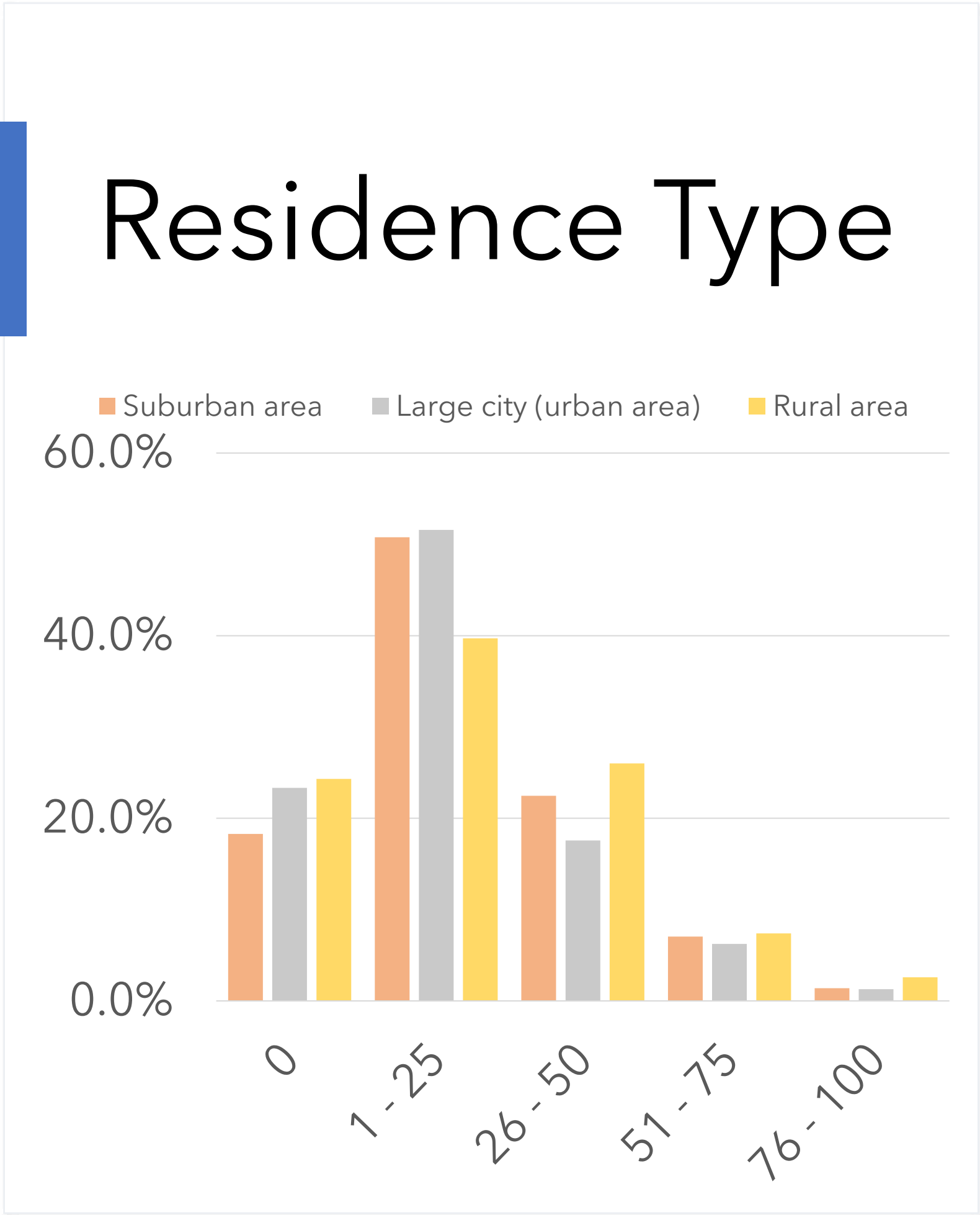


Percent Potentially Marketable (Index Above 25)

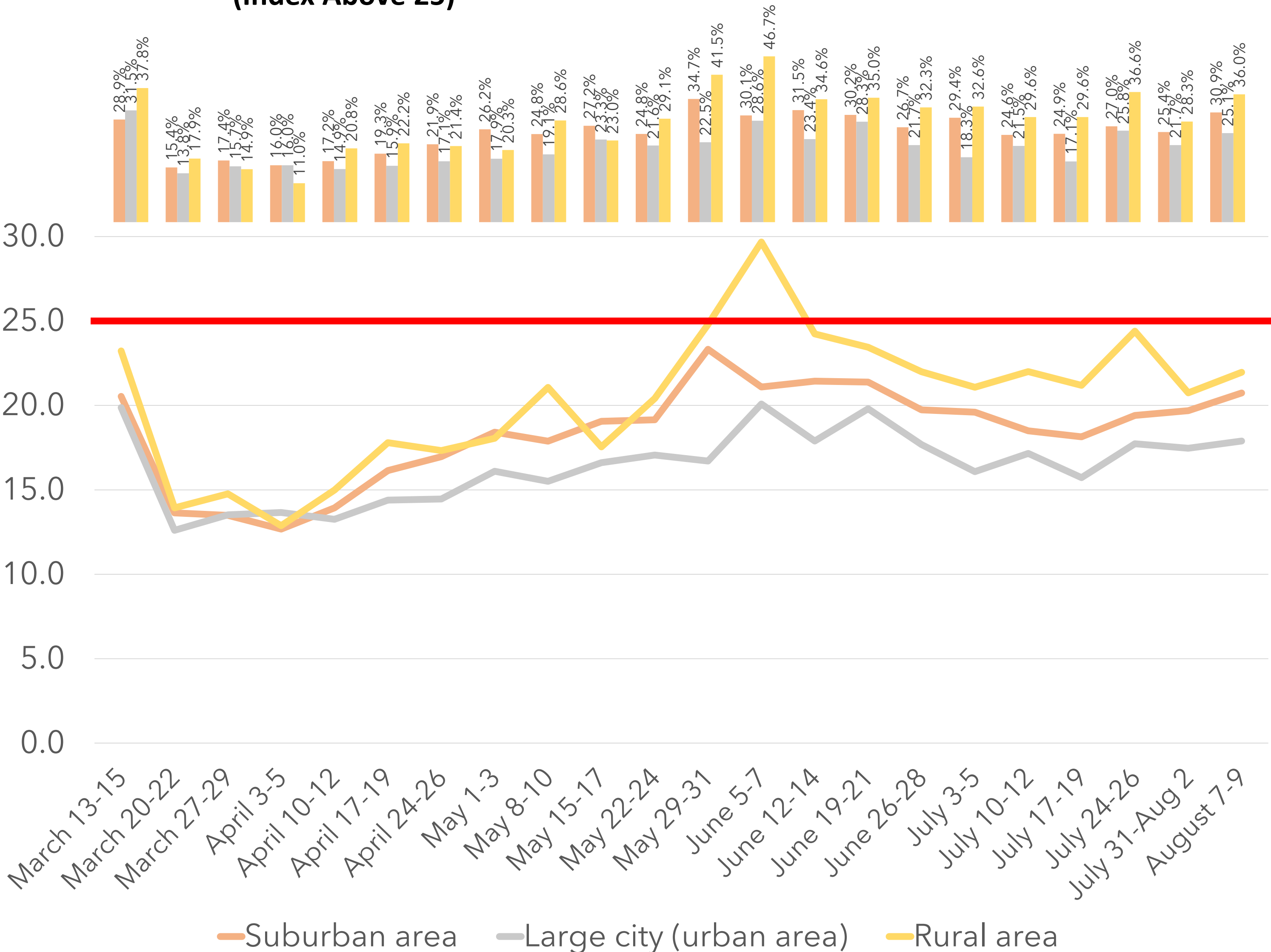




Residence Type

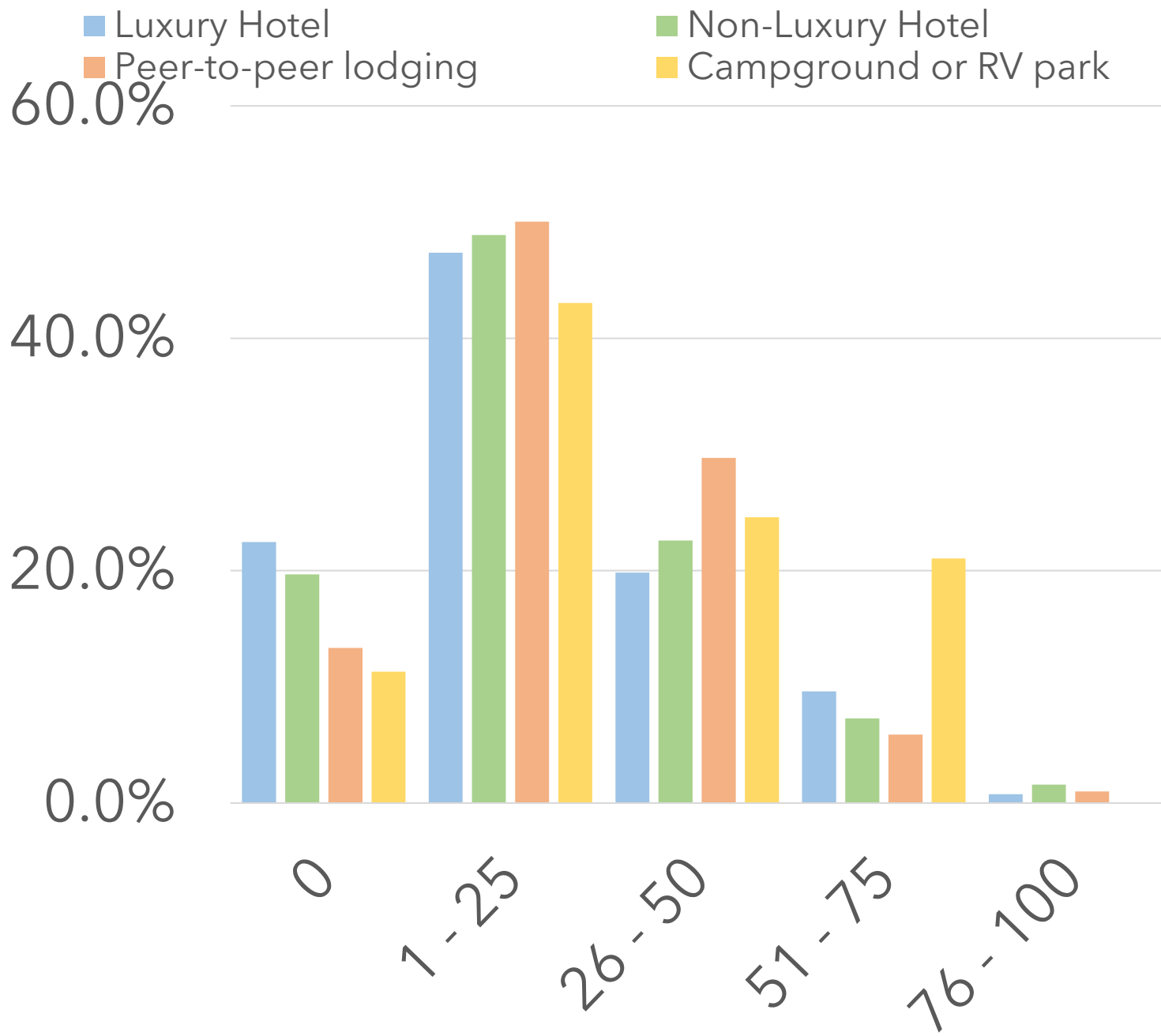


Percent Potentially Marketable (Index Above 25)

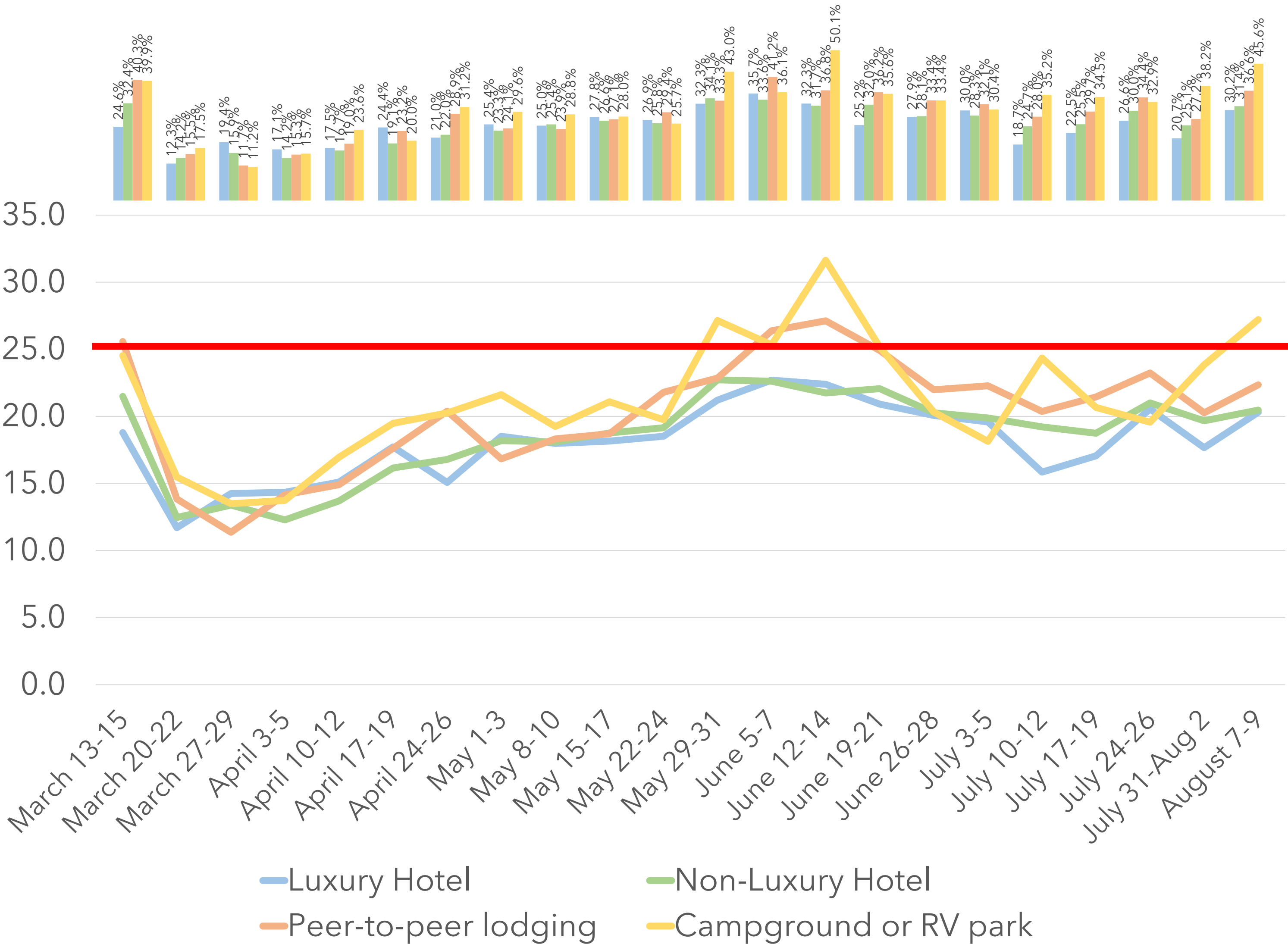




Lodging Preference



Percent Potentially Marketable (Index Above 25)



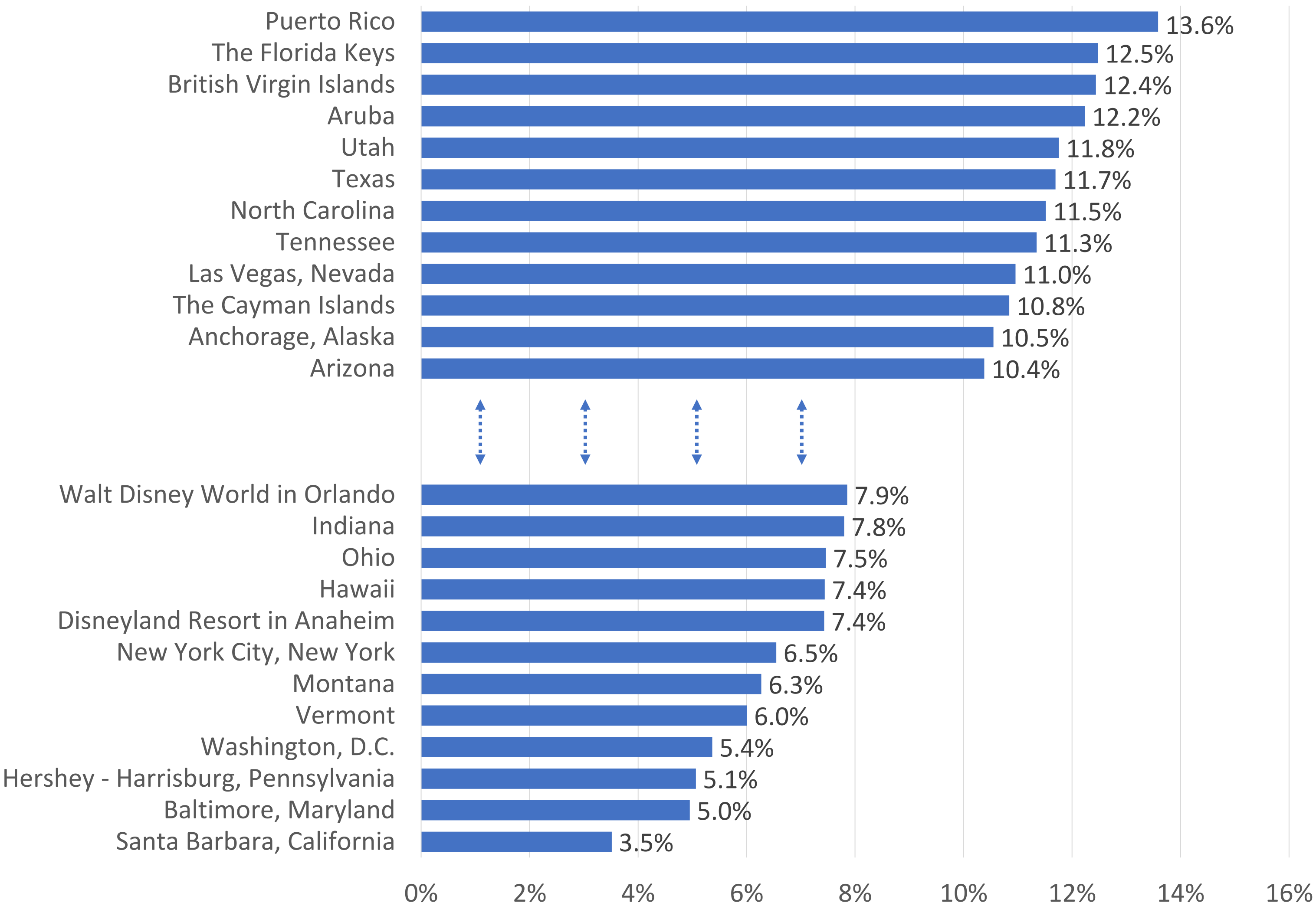
A Destination's Low-Hanging Fruit

*Recent visitors and those
already expecting future visits*



Percent Ready to Travel (Top 12 and Bottom 12 Destinations)

Percent ready to travel amongst those visiting the destination on a leisure trip (past 3 years) or likely to visit on a leisure trip (next 3 years)





Those Who are Ready to Travel

THOSE WHO ARE READY TO TRAVEL

- **Feel comfortable going out and about in their community**
- **Expect the coronavirus situation to get better in the next month and that they will be traveling this Fall**
- **Are less likely to perceive travel activities as unsafe**



THOSE WHO ARE READY TO TRAVEL

- Are more likely to expect their next air trip to be this year
- Discounts make them more interested in near-term travel
- They consider hotel discounts to be both valuable and appealing



THOSE WHO ARE READY TO TRAVEL

- **Feel that a having a scheduled vacation and planning a vacation in the next six months would bring them happiness**
- **For nearly all lifestyle priorities tested, they're more likely to prioritize them in the next 6 months compared to their counterparts**



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



**Do you have a survey topic you
want us to explore?**

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**

Resources for Tourism Advocacy & Recovery

destinationanalysts.com

ROI

THIS YEAR ▼ 32.8876
▲ 42.9841

First quarter
Jan-Mar

Second quarter
Apr-Jun

Third quarter
Jul-Sep



A silhouette of two people on a large rock against a sunset sky. One person is standing on the rock, and the other is climbing up, holding their hand. The scene is set against a warm, orange and yellow sunset sky with some bare branches in the foreground.

Research & Data Support for Grant Applications & Recovery Programs

info@destinationanalysts.com

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

**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars