CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings
September 21st, 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.

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- Visitor Activity Analysis & Segmentation

- Persona Research

- Resident + Stakeholder Research

- Diversity, Equity + Inclusion Initiatives

- Meetings & Convention Research

- Advertising Testing

- Grant Support

info@destinationanalysts.com

Independent, unbiased research

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 28 data (fielded September 18th-20th) 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

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- Presentation to Board of Directors or other meeting/event

- FREE TRIAL AVAILABLE

CORONAVIRUS DEATHS

U.S. Covid-19 Death Toll Surpasses 200,000

A prediction made in March — unfathomable at the time — has come to pass

Published September 19, 2020 • Updated on September 19, 2020 at 12:06 pm

Joe Raedle/Getty Images

In this Aug. 8, 2020, file photo, Joseph Louis pays his respects to German Amaya, who he worked with for 10 years, as family and friends held a wake ceremony at the Maspons Funeral Home in Miami, Florida. German Amaya died from the coronavirus (COVID-19).

In the predawn hours of March 30, Dr. Deborah Birx stepped in front of the camera on the White House lawn and made an alarming prediction about the coronavirus, which had, by then, killed fewer than 3,000 people in the United States.

"If we do things together, well, almost perfectly, we can get in the range of 100,000 to 200,000 fatalities," Birx, coordinator of the White House coronavirus task force, told Savannah Guthrie of NBC News' "Today" show.

US DAILY DEATHS. 7-DAY AVERAGE LINE

Mar 1   Sep 19

The COVID Tracking Project
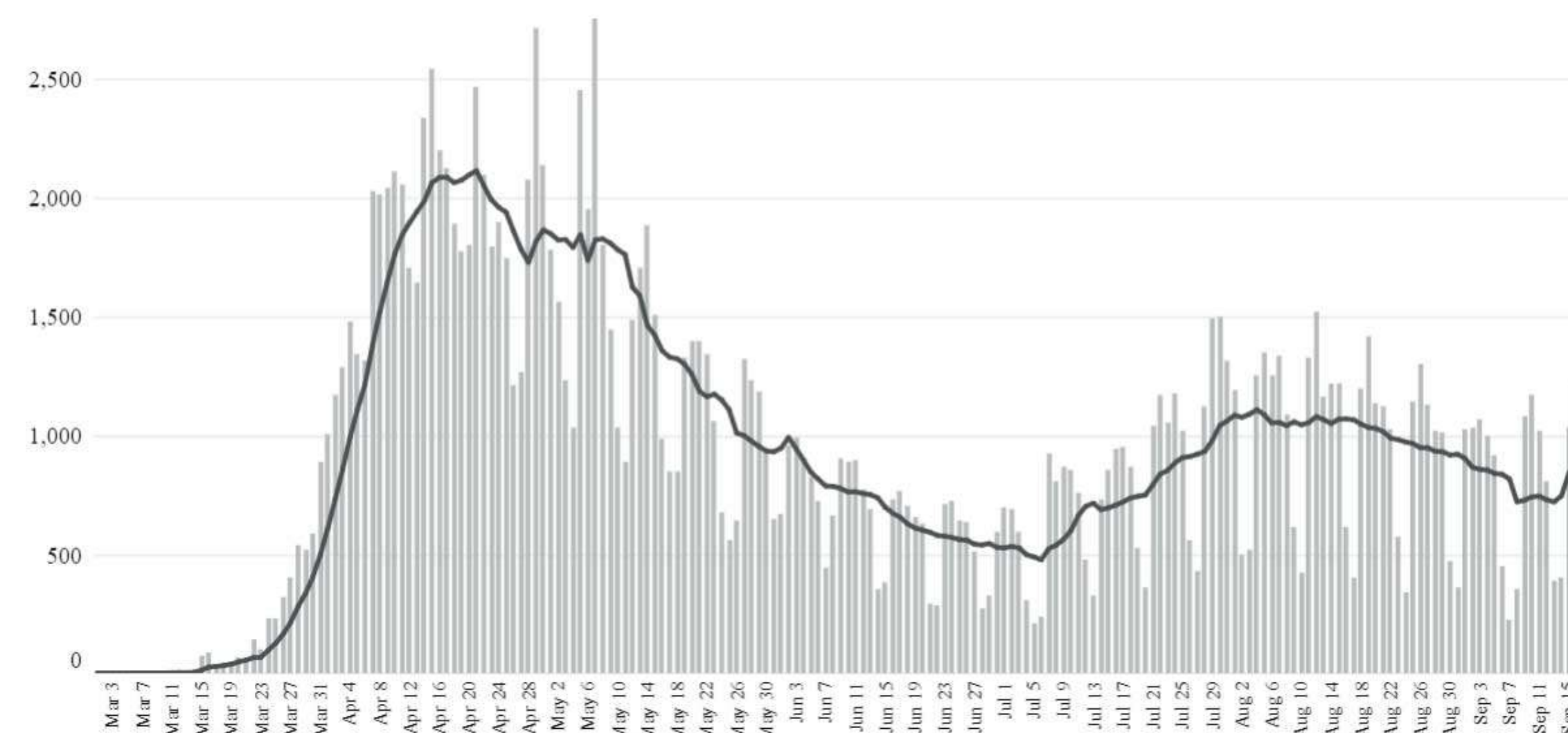
Coronavirus can spread on airline flights, two studies show

By **Maggie Fox**, CNN
Updated 11:46 PM ET, Fri September 18, 2020

(CNN) — The young woman and her sister had traveled across Europe just as the coronavirus pandemic was taking off there, visiting Milan and Paris before heading to London.

When the woman left London on March 1, she had a sore throat and cough as she boarded a flight home to Vietnam, but no one noticed.

By the time she got off the flight in Hanoi 10 hours later, 15 other people who had been on the plane with her were infected, researchers reported Friday.

This story is one of two published Friday demonstrating how coronavirus can spread on airline flights, and suggesting that simply spacing people out a little will not fully protect them.

Related Article: Woman may have caught coronavirus in airplane toilet, researchers say

In another incident, passengers on a flight from Boston to Hong Kong appear to have infected two flight attendants.

Both cases involved long flights early in the pandemic, before airlines began requiring face masks.

A team from Vietnam tracked down a cluster of cases linked to the flight that arrived in Hanoi from London on March 2.

Tickets for Qantas flight to nowhere sell out in minutes (02:21)

Qantas seven-hour flight to nowhere sells out in 10 minutes

Francesca Street, CNN • Updated 18th September 2020

f   y   ✉

(CNN) — Pre-pandemic, many of us viewed flying simply as a method of getting from one destination to another as quickly as possible.

But amid global restrictions, travelers have been daydreaming not only about far-flung destinations, but the flying experience itself -- from the thrill of the take-off to the unmatched views of the Earth from the cabin window.

MISSOURI

'We're one of the winners in this Covid thing.' A record summer at Lake of the Ozarks

BY KEVIN HARDY AND LAURA BAUER

SEPTEMBER 20, 2020 05:00 AM

How did those wild Lake of the Ozarks parties affect business? Not like you might think.

SHARE

Lake of the Ozarks

▶ 0:02/2:57

The coronavirus had all but shut down the tourism industry at Missouri's Lake of the Ozarks. But after videos of wild parties over Memorial Day and some unflattering national attention, things changed.
BY JILL TOYOSHIBA | KEVIN HARDY

▶ **Listen to this article now**
14:55   Powered by **Trinity Audio**

LAKE OF THE OZARKS, MO.

Bars couldn't keep up with the demand for Coors Light. Same with auto dealerships and new cars.

Boat dealers had trouble keeping up and construction crews ran out of lumber needed to build new homes. The real estate market heated up so much that buyers made unsolicited multi-million-dollar offers on lakefront homes.

What Is Going on Out There?

SUMMER LEISURE TRIPS

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

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

Yes, 32.8%

No, 67.2%

Mean = 2.0

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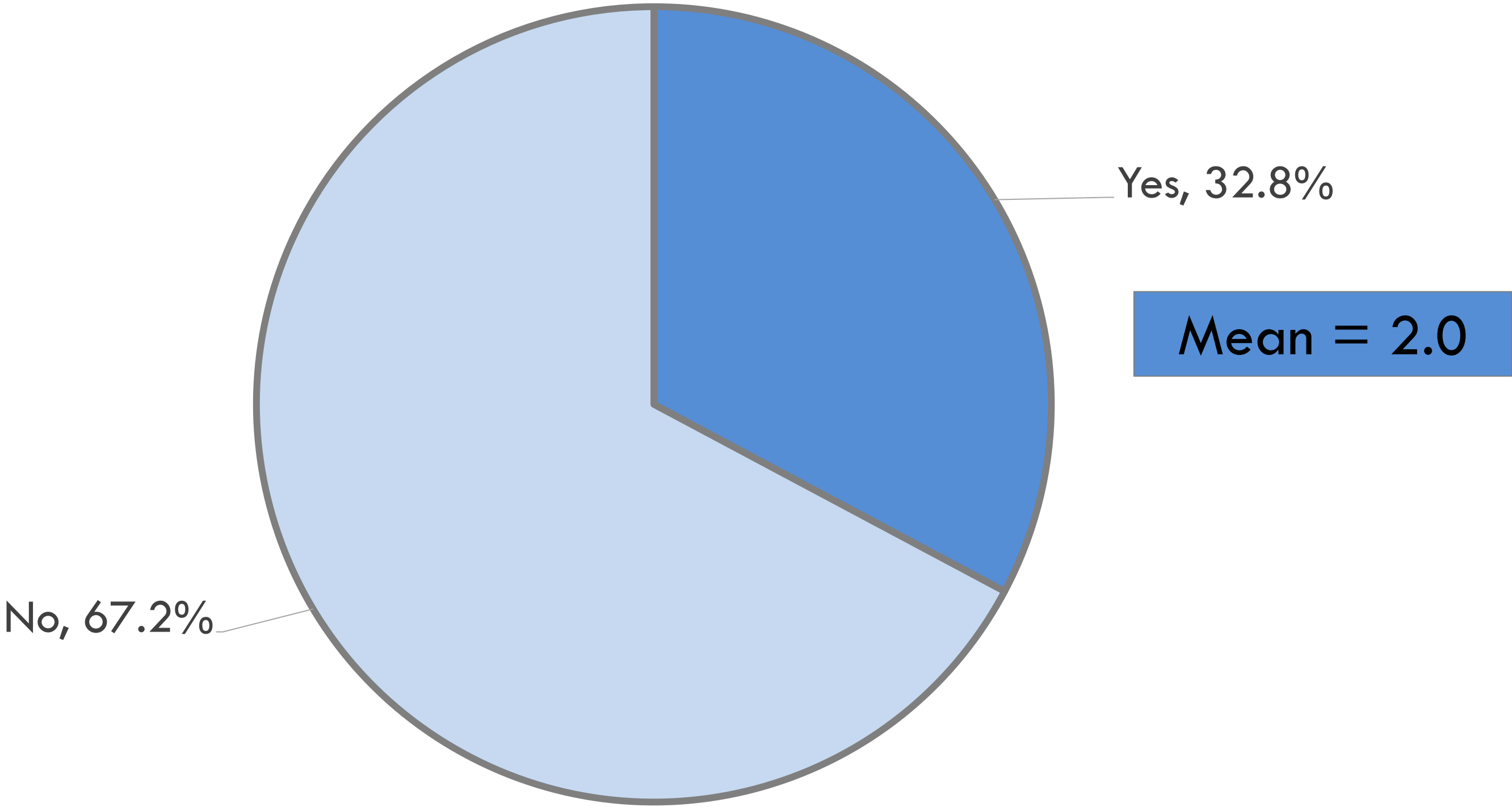
TRAVEL STATE-OF-MIND

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

I'm already traveling — 12.8%

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

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

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

I need a lot more time to be ready to travel — 24.9%
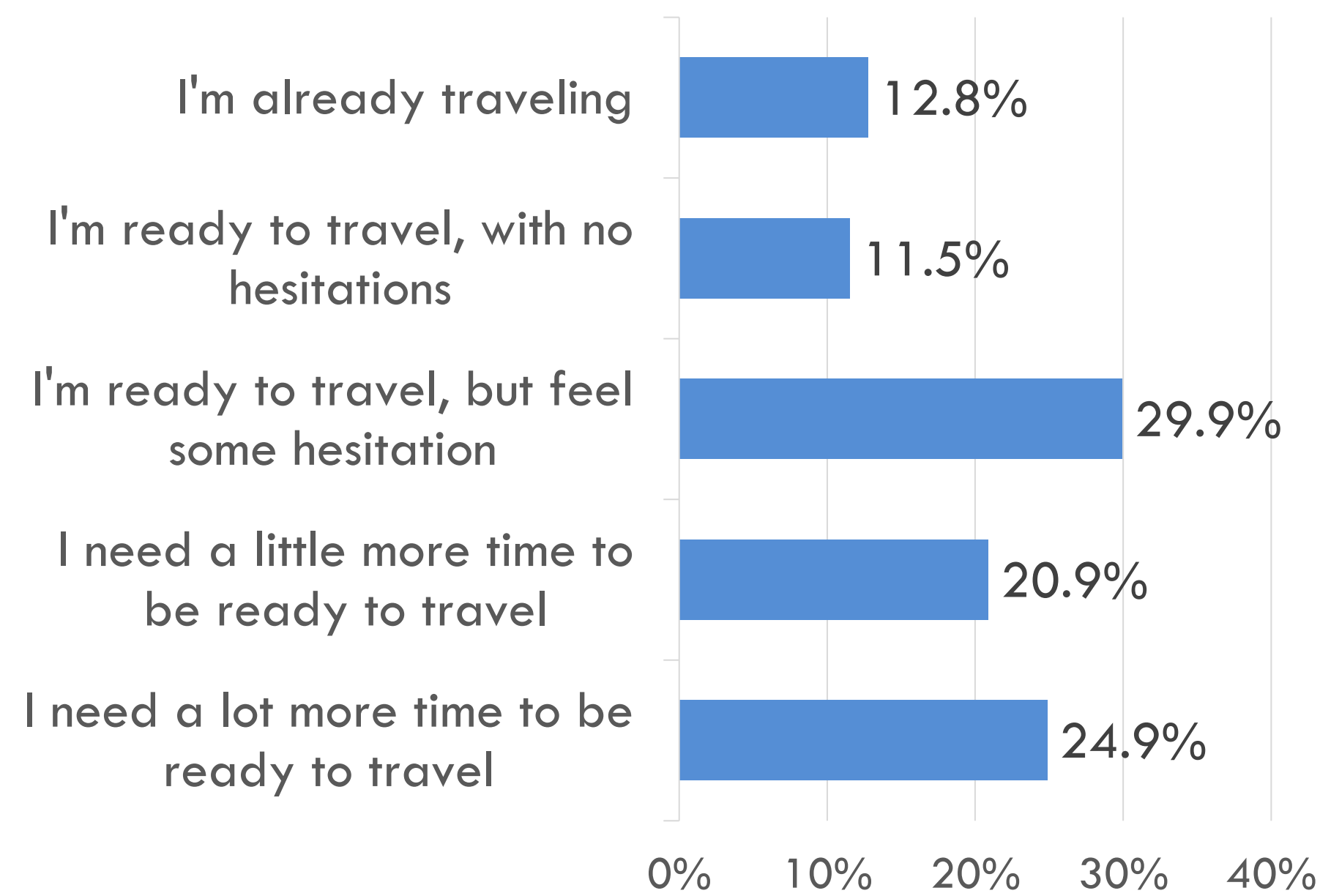
(Base: Waves 12-13 and 15-28. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Historical data

Legend: Ready to travel / Not ready to travel

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

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

X-axis: May 29-31, June 5-7, June 19-21, June 26-28, July 3-5, July 10-12, July 17-19, July 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20
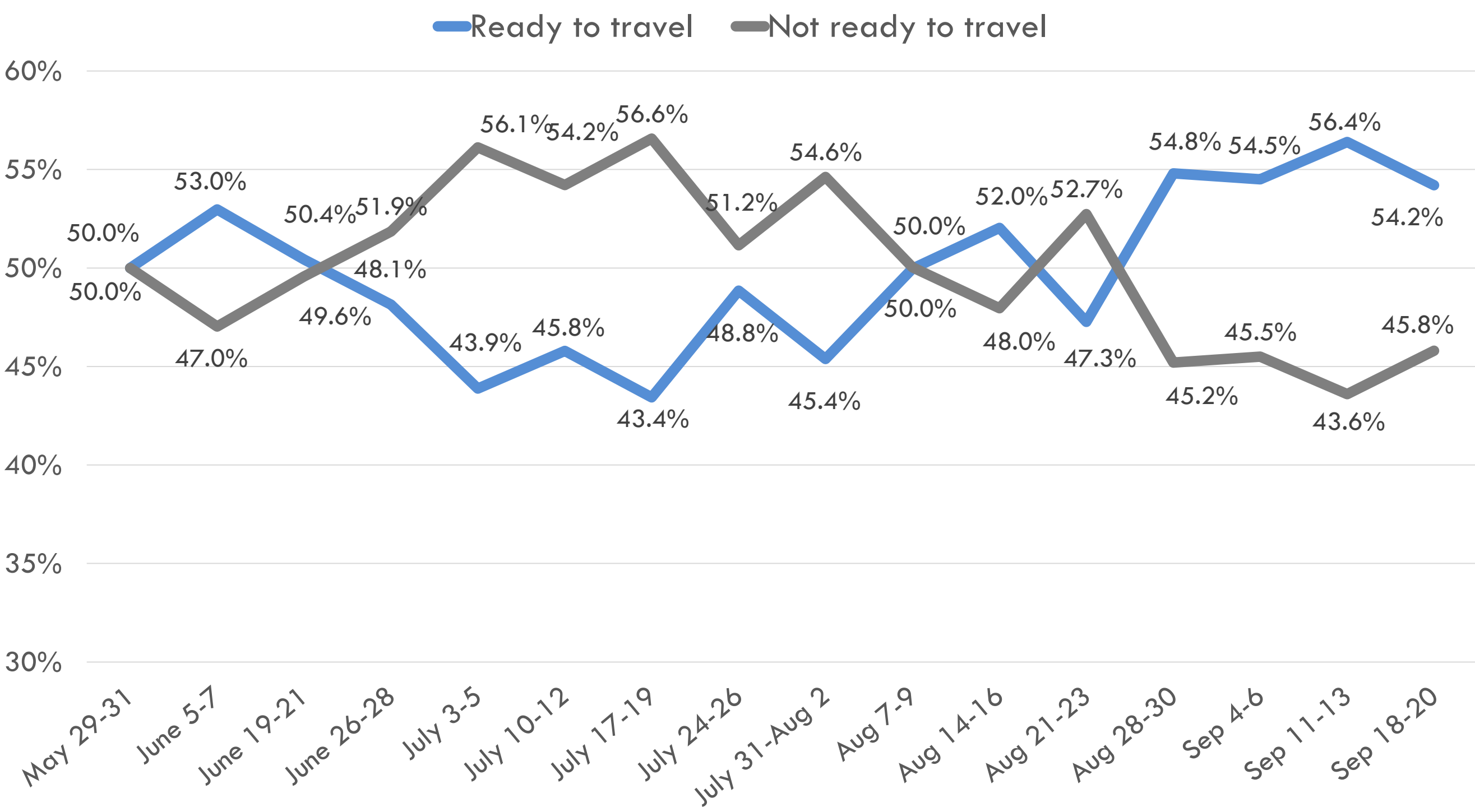
EXPECTATIONS FOR TRAVELING IN THE FALL

How much do you agree with the following statement?

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

Pie chart:
- Neutral (neither agree nor disagree), 20.4%
- Agree, 22.9%
- Strongly agree, 11.8%
- Strongly disagree, 24.7%
- Disagree, 20.2%

Historical data

Legend: Agree or Strongly agree — Disagree or Strongly disagree

Agree or Strongly agree: 53.1%, 51.3%, 51.2%, 48.0%, 48.2%, 42.3%, 41.8%, 35.6%, 44.0%, 49.6%, 46.0%, 45.0%, 39.7%, 38.0%, 36.2%, 35.7%, 34.2%, 41.4%, 38.0%, 29.9%, 34.5%, 32.4%, 35.9%, 29.8%, 32.4%, 37.0%, 34.7%

Disagree or Strongly disagree: 16.4%, 20.7%, 20.9%, 23.1%, 24.0%, 30.3%, 29.8%, 31.2%, 26.7%, 25.6%, 28.1%, 28.2%, 34.2%, 39.3%, 40.0%, 46.6%, 42.9%, 43.8%, 47.2%, 41.8%, 42.2%, 45.7%, 44.8%

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

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

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AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

How much do you agree with the following statement?

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

Agree, 25.6%

Neutral (neither agree nor disagree), 19.9%

Disagree, 18.2%

Strongly disagree, 9.2%

Strongly agree, 27.2%

Historical data

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

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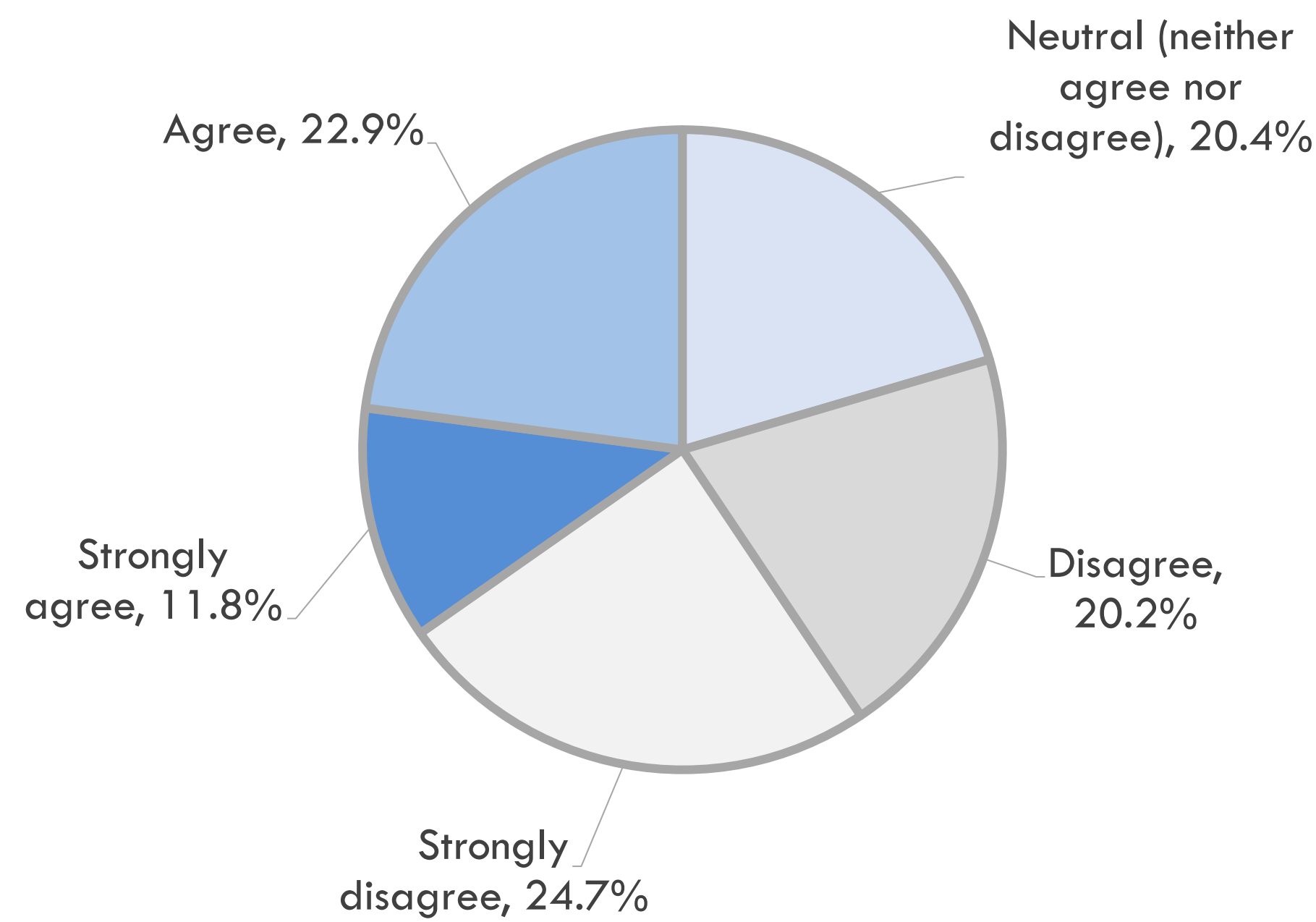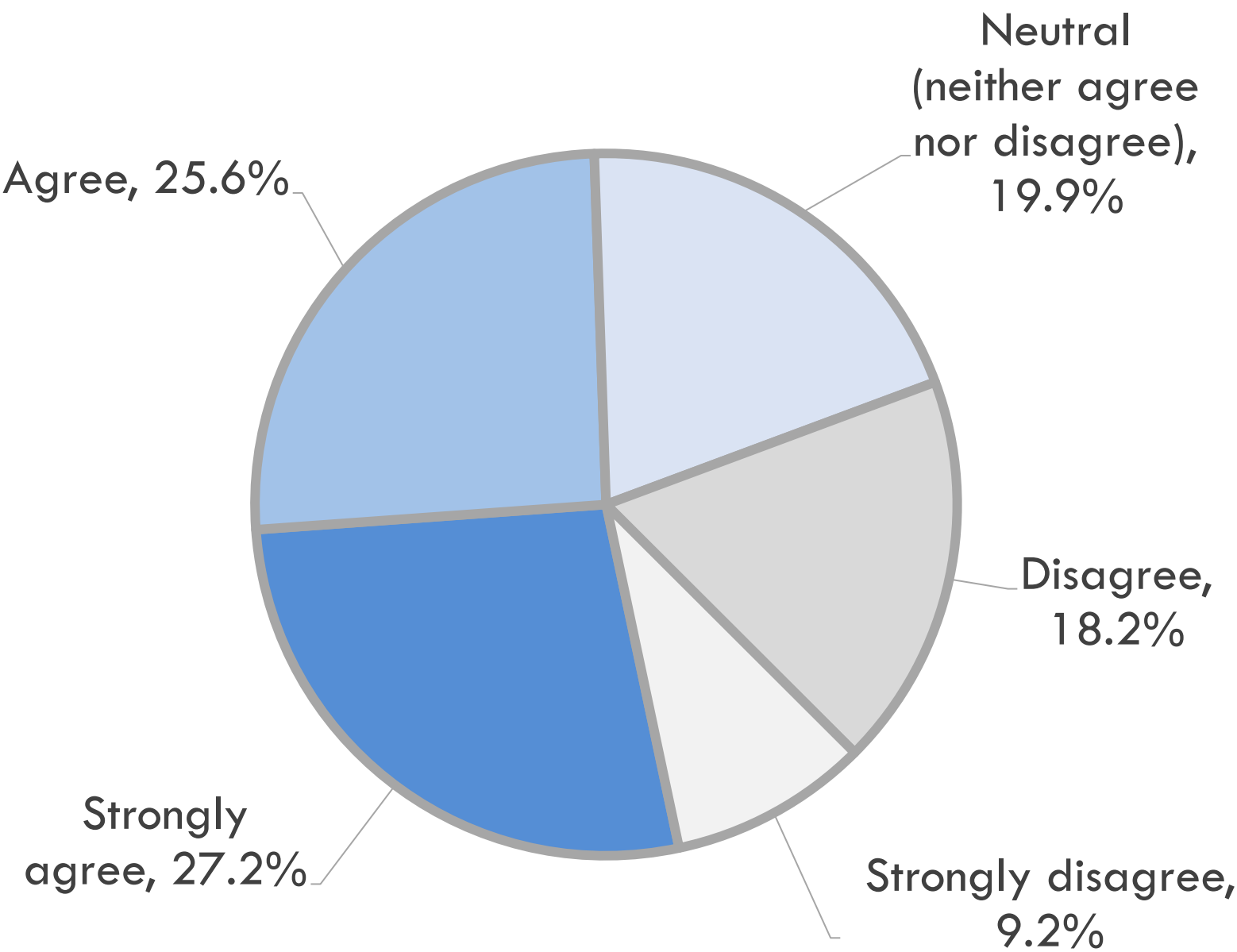DO YOUR RESEARCH
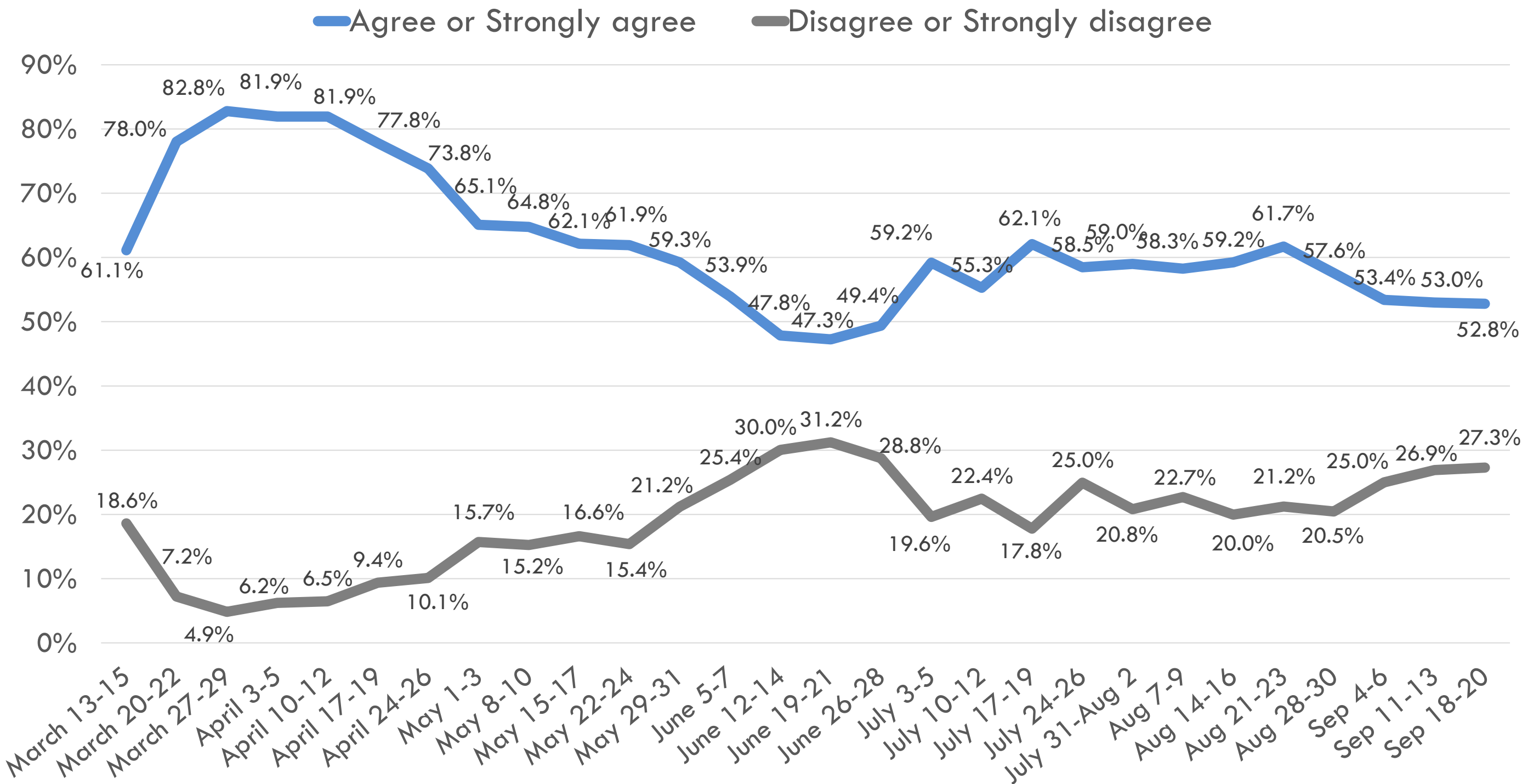
EXPECTATIONS FOR THE PANDEMIC'S COURSE AT THE END OF 2020

How much do you agree with the following statement?

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

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

Historical data

Agree or Strongly agree — Disagree or Strongly disagree

	Aug 21-23	Aug 28-30	Sep 4-6	Sep 11-13	Sep 18-20
Disagree or Strongly disagree	60.6%	54.0%	54.8%	59.6%	61.6%
Agree or Strongly agree	19.3%	25.2%	22.5%	22.6%	21.5%

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

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NATIONAL ANXIETY MAP

% Concerned (10-6)

National Economy — 83.5%, 83.8%
Friends/Family Health — 73.3%, 73.8%
Personal Health — 69.8%, 68.6%
Personal Finances — 56.7%, 55.4%

80.8%, 70.8%, 62.8%, 62.0%

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, Jly 31-Aug 2, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20
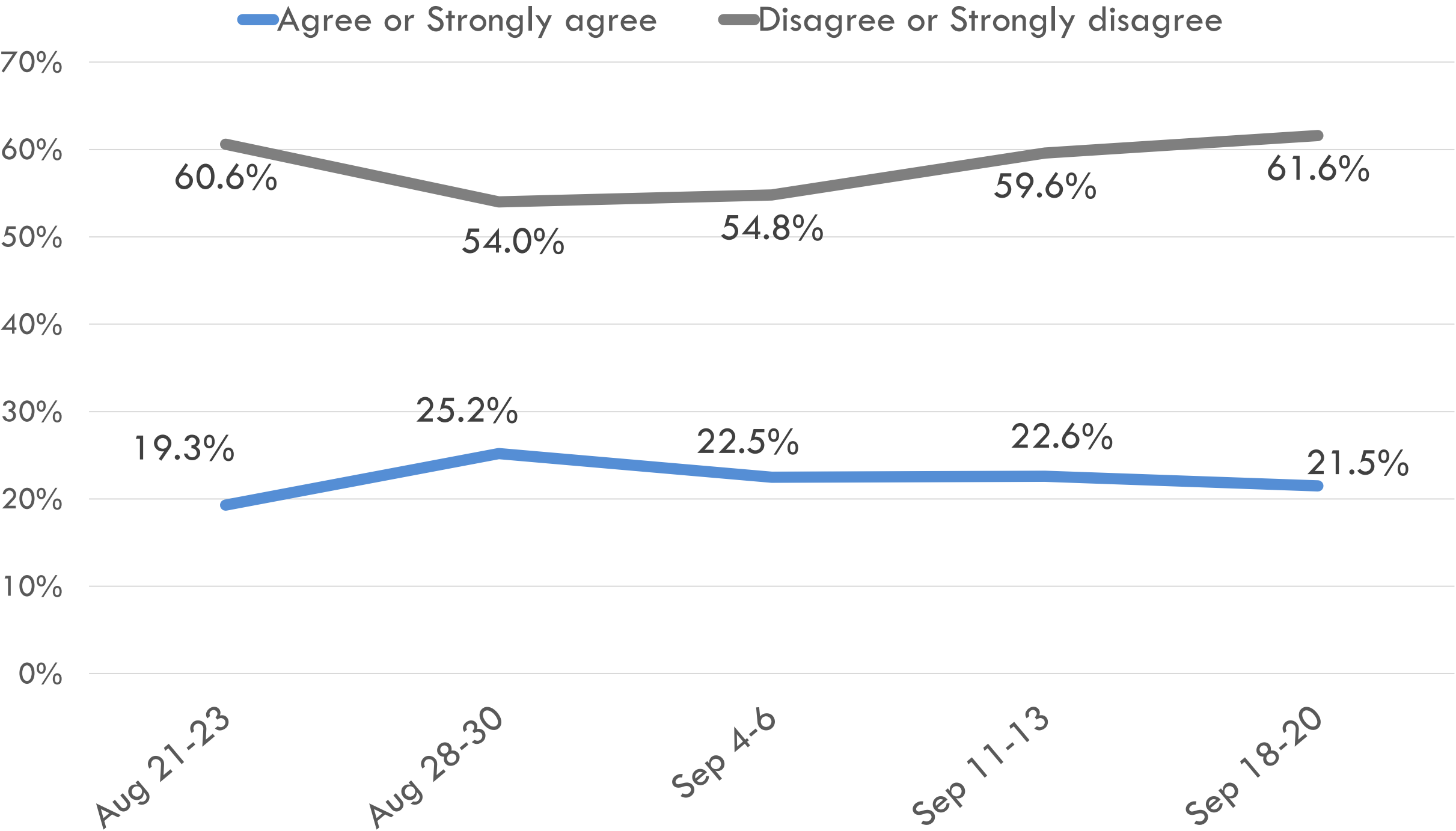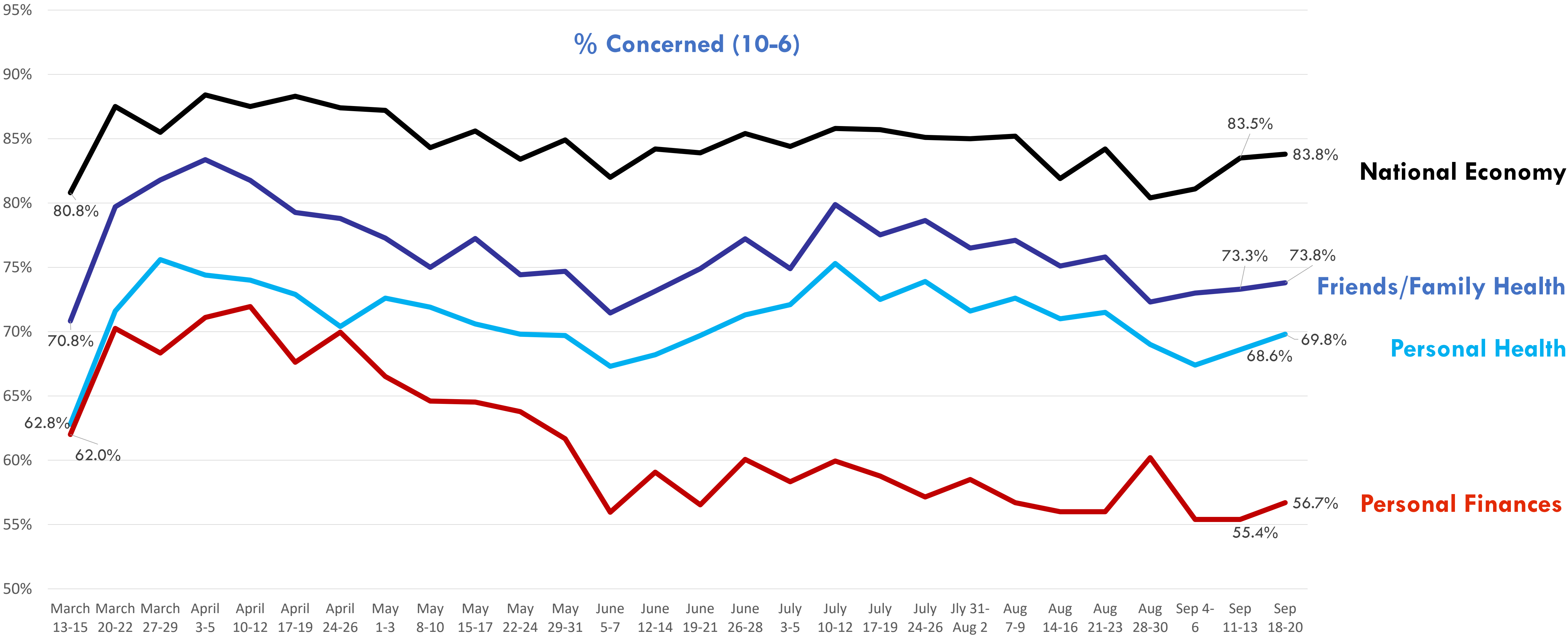
PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 28)

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

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

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

Average = 52.3%

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

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

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

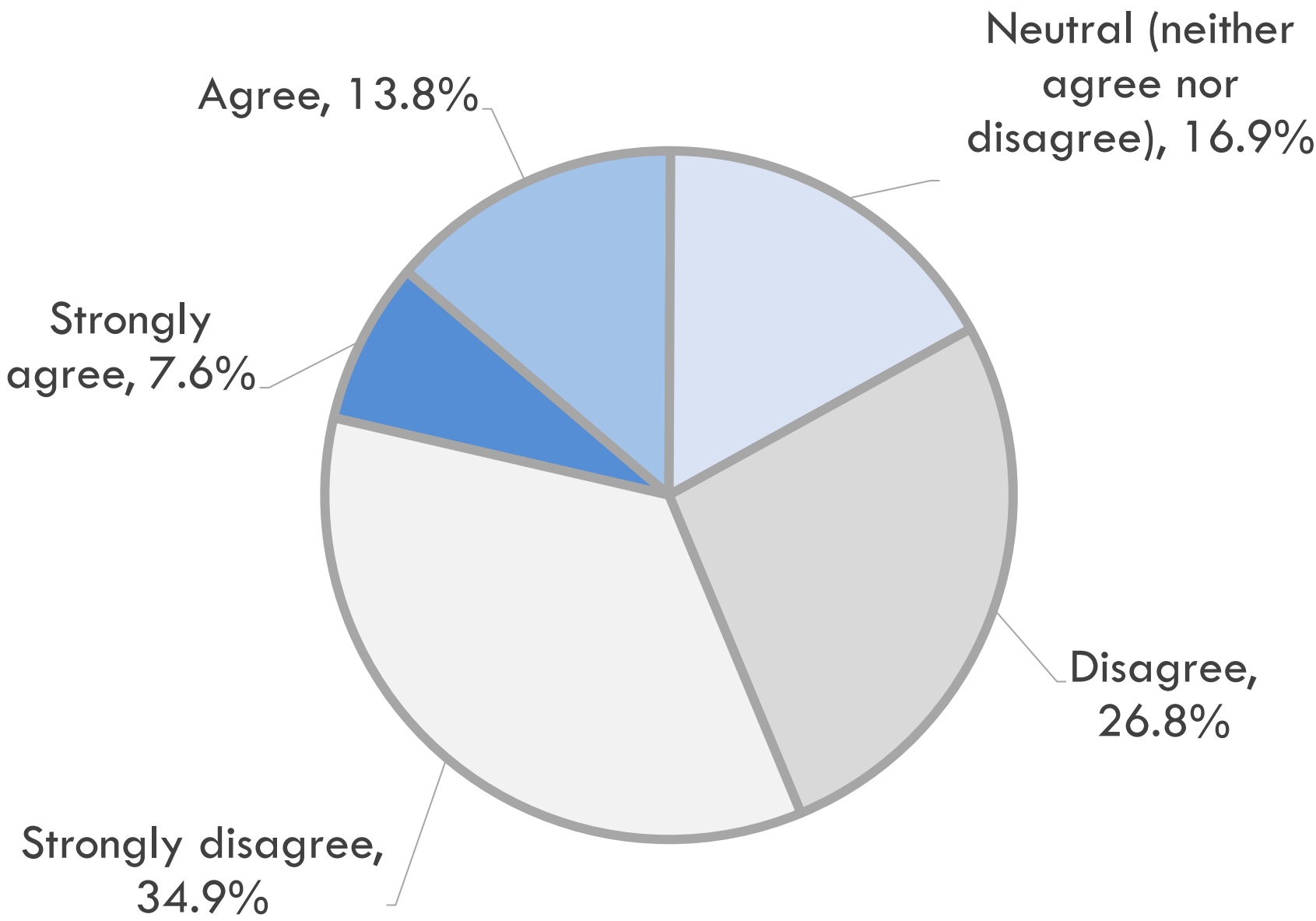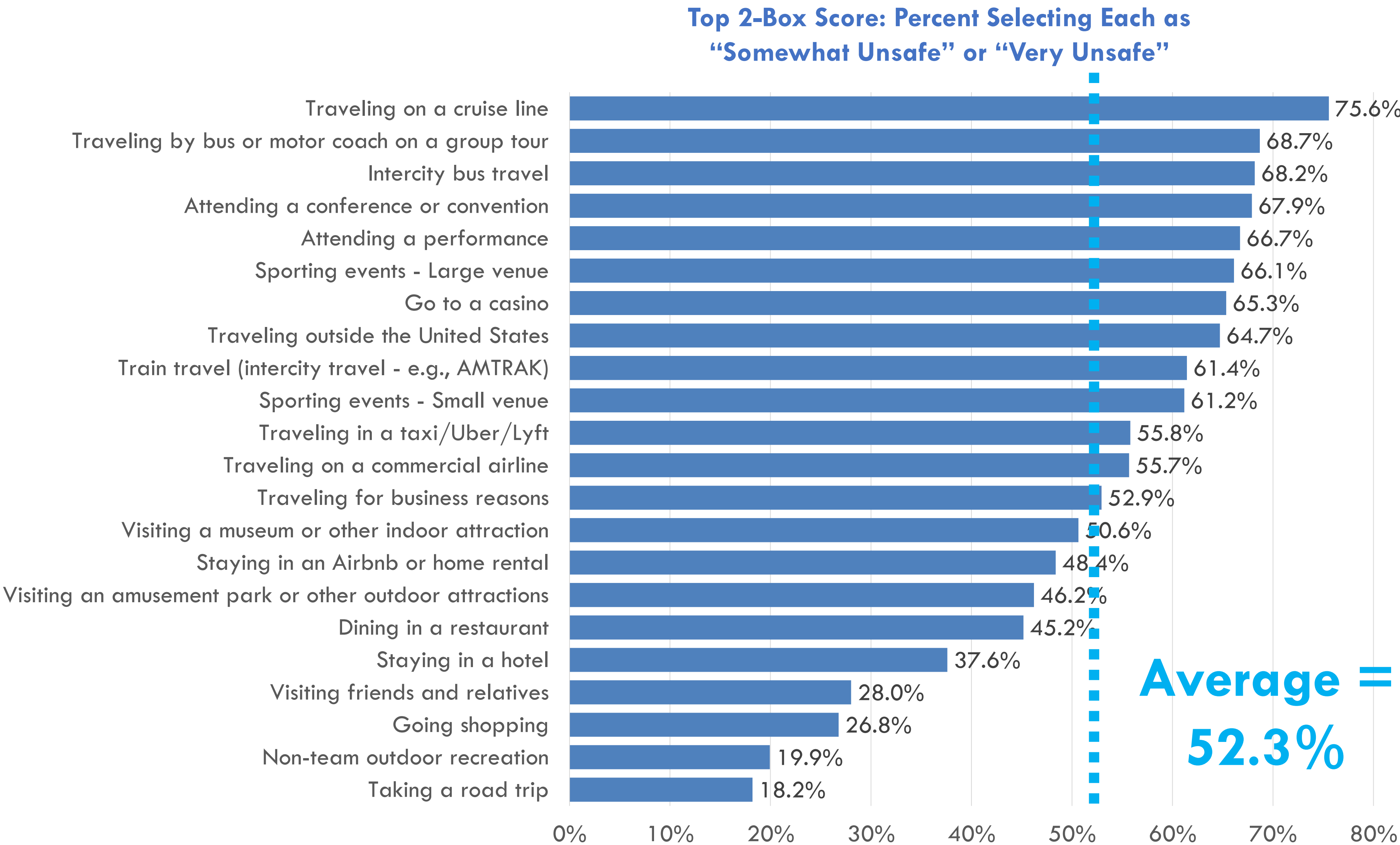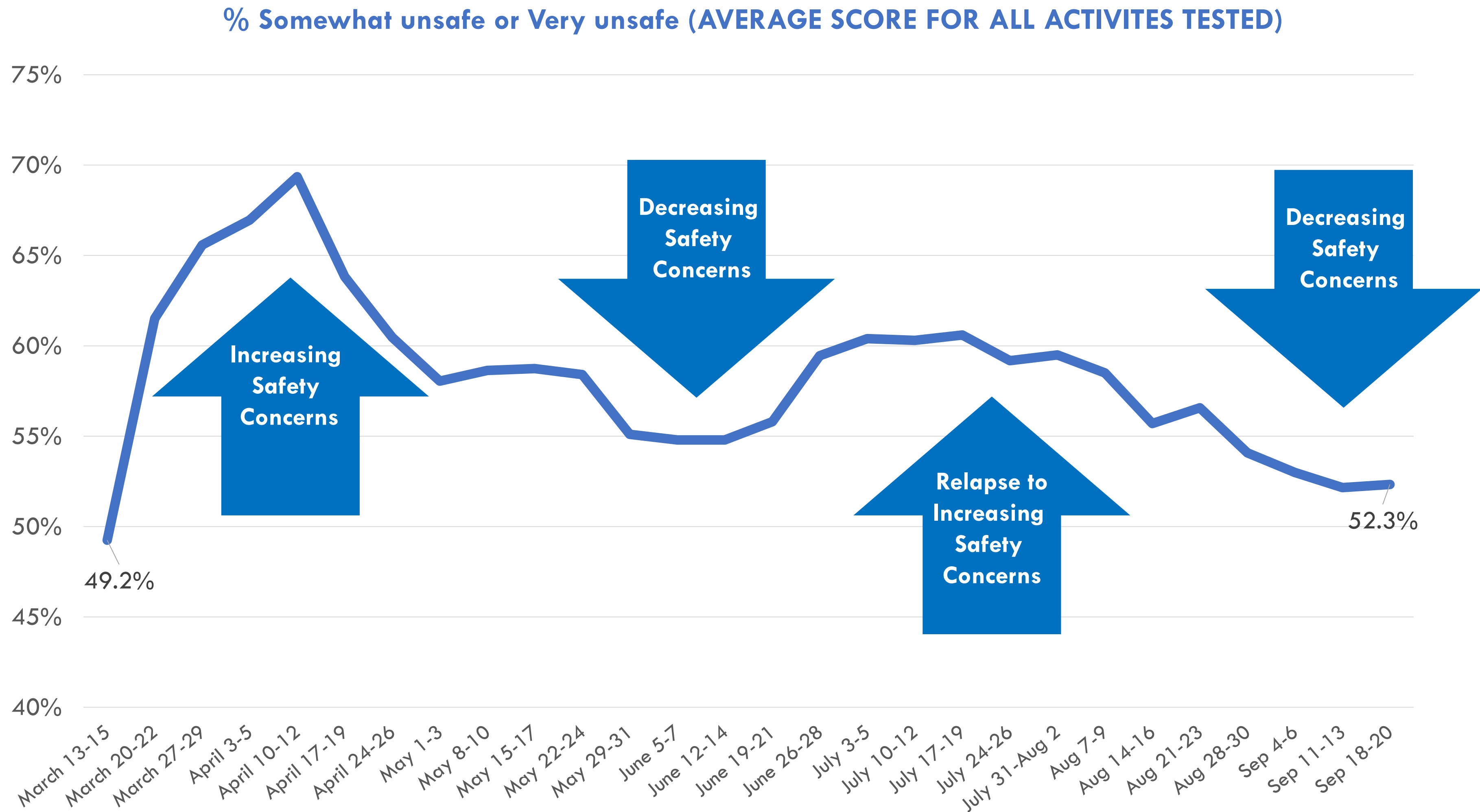**% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITES TESTED)**

Increasing Safety Concerns

Decreasing Safety Concerns

Relapse to Increasing Safety Concerns

Decreasing Safety Concerns

49.2%

52.3%

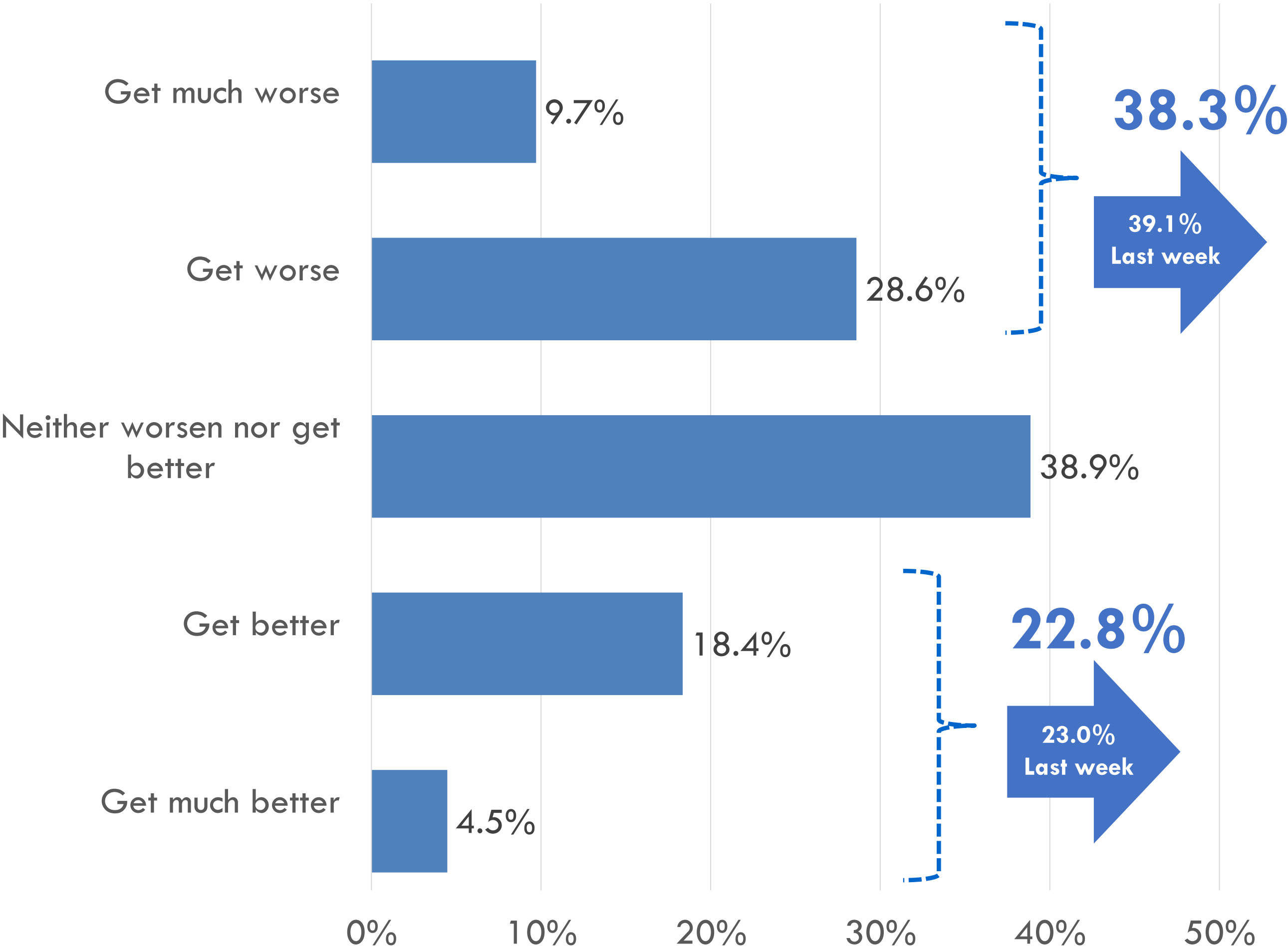Destination Analysts
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EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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

In the next month the coronavirus situation will _____

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

Get much worse — 9.7%
Get worse — 28.6%
Neither worsen nor get better — 38.9%
Get better — 18.4%
Get much better — 4.5%

38.3%
39.1% Last week

22.8%
23.0% Last week

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EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-28)

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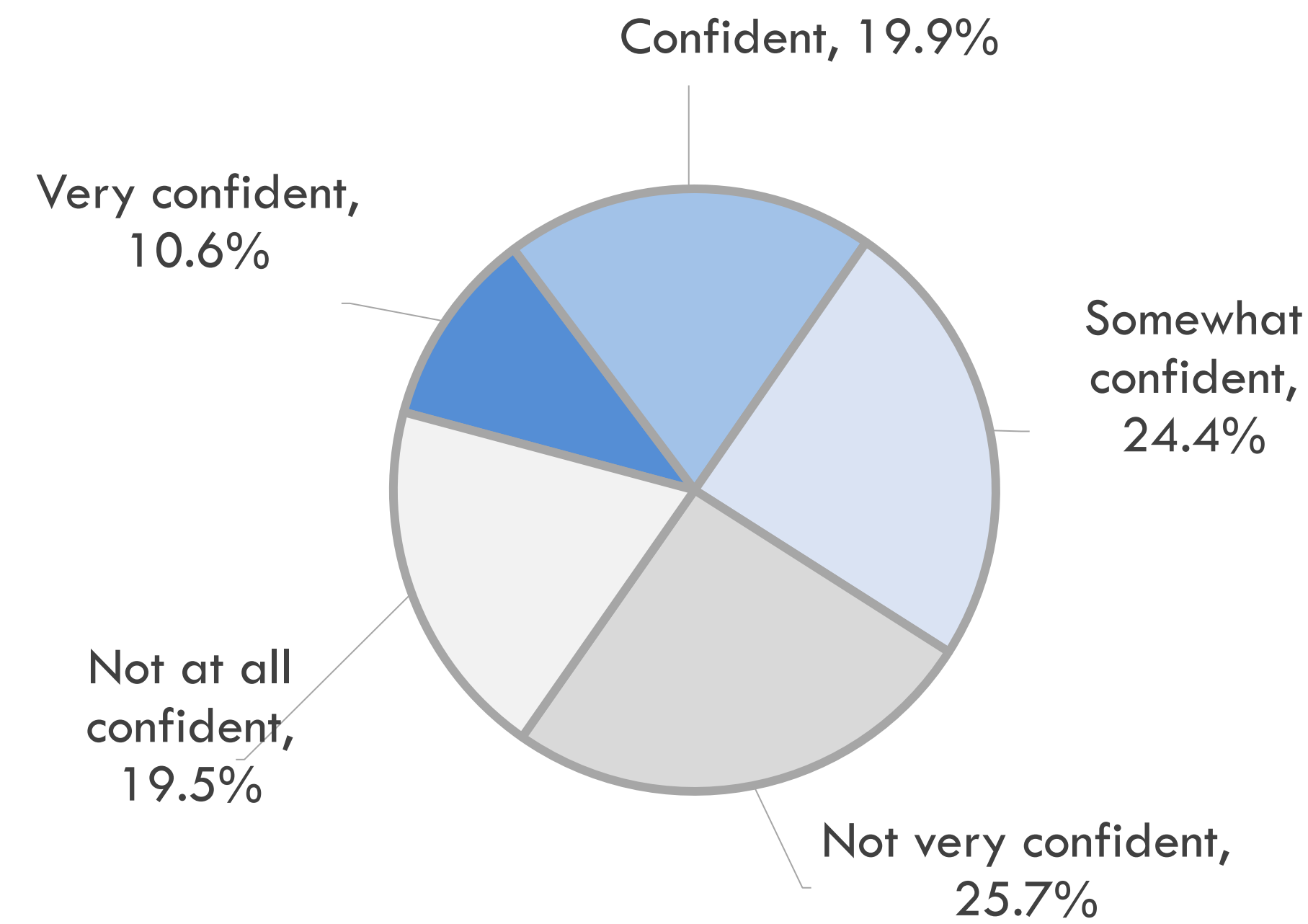
In the next month the coronavirus situation will _____

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

"Worse" or "Much worse"

"Better" or "Much better"
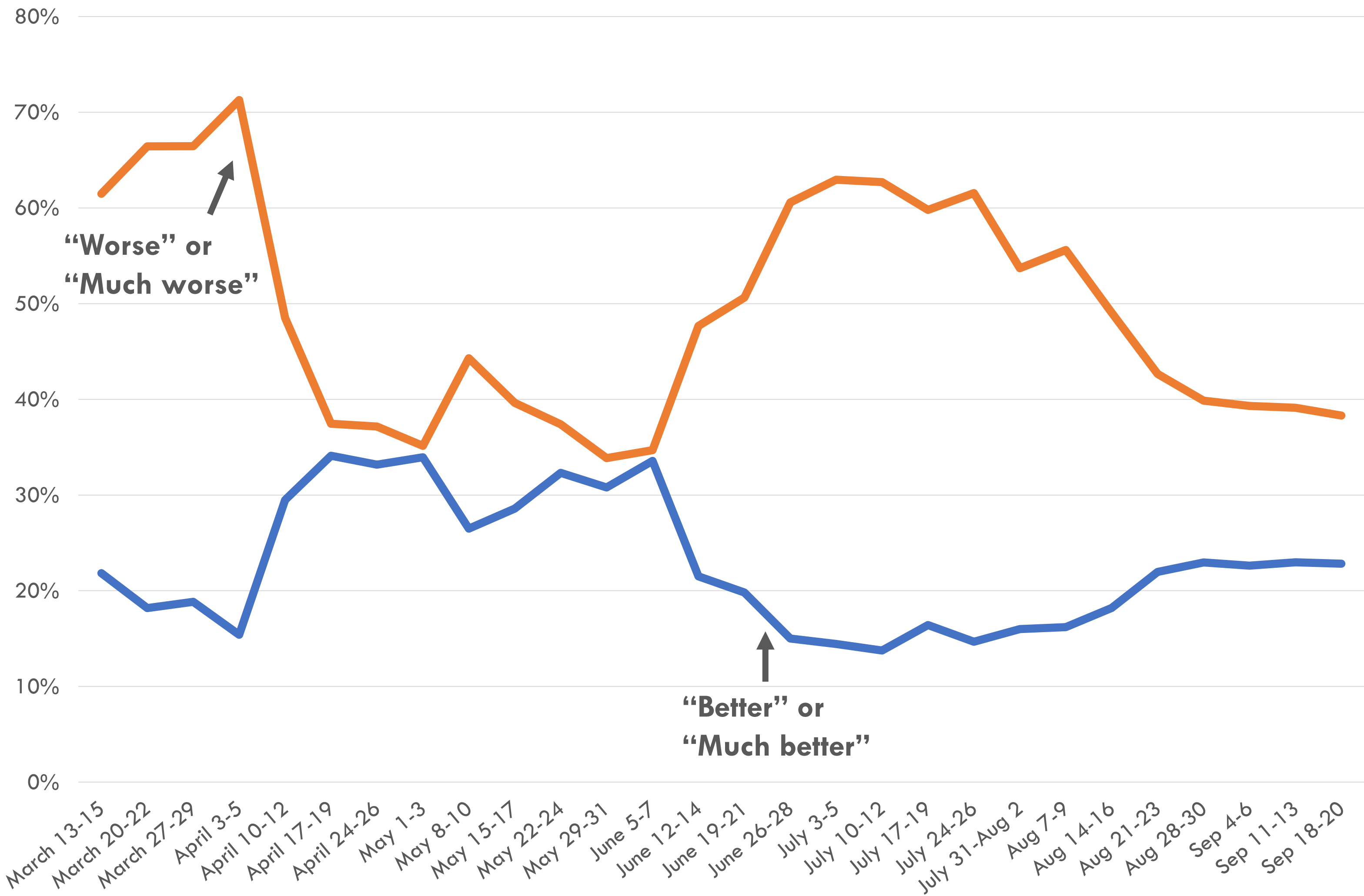
CONFIDENCE IN TRAVELING SAFELY

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

Confident, 19.9%

Very confident, 10.6%

Somewhat confident, 24.4%

Not at all confident, 19.5%

Not very confident, 25.7%

Historical data

Confident or Very confident

Not very or Not at all confident

60%

50%

40%

30%

20%

10%

0%

36.9%

46.0%

46.3%

45.8%

45.1%

34.2%

29.7%

28.4%

30.2%

30.5%

Aug 21-23   Aug 28-30   Sep 4-6   Sep 11-13   Sep 18-20

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

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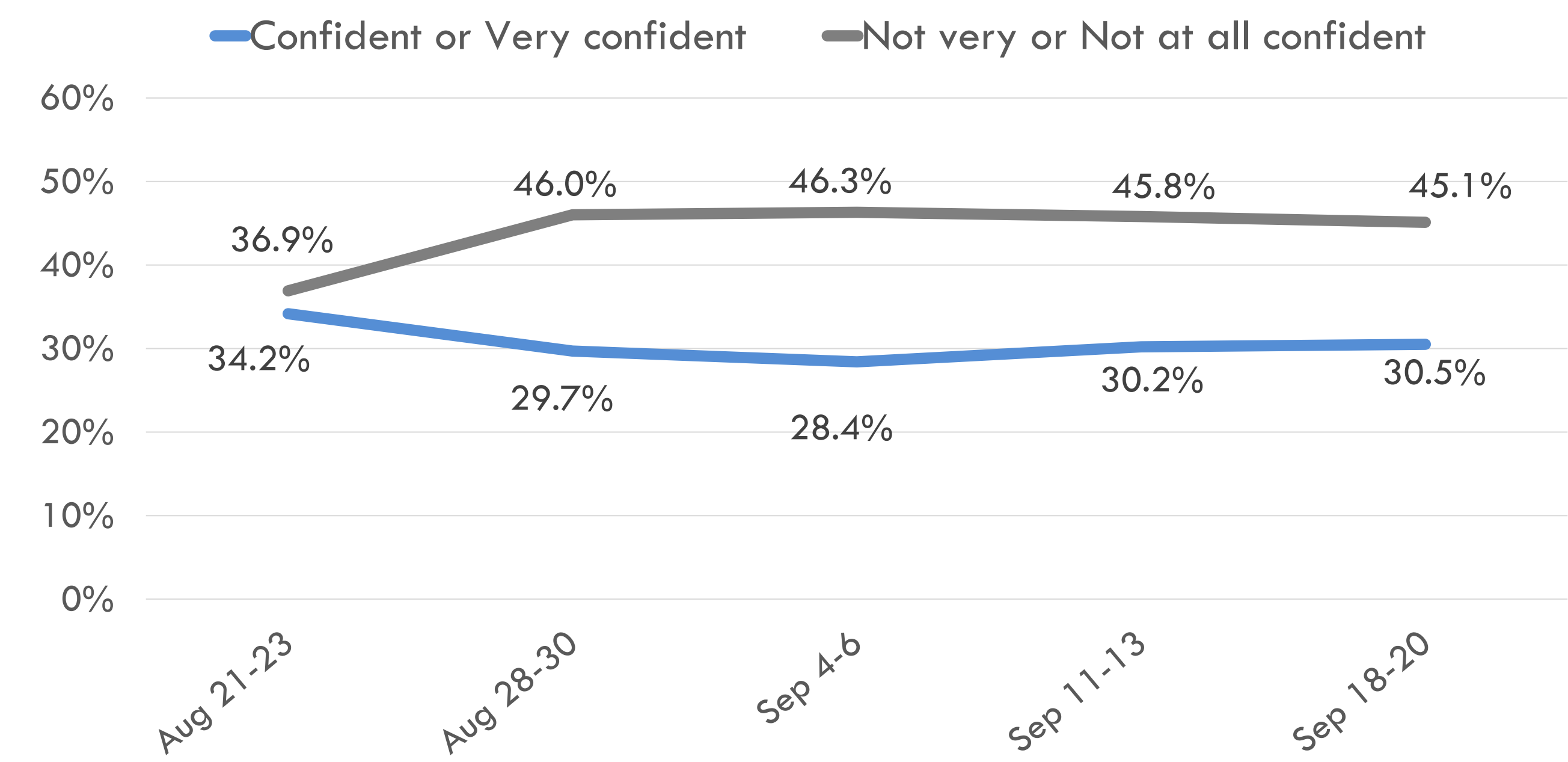
INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

How much do you agree with the following statement?

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

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

Strongly agree — 25.8%

Agree — 31.0%

Neutral (neither agree nor disagree) — 20.9%

Disagree — 14.1%

Strongly disagree — 8.2%

56.8% — 60.5% July 26th

22.3% — 19.2% July 26th
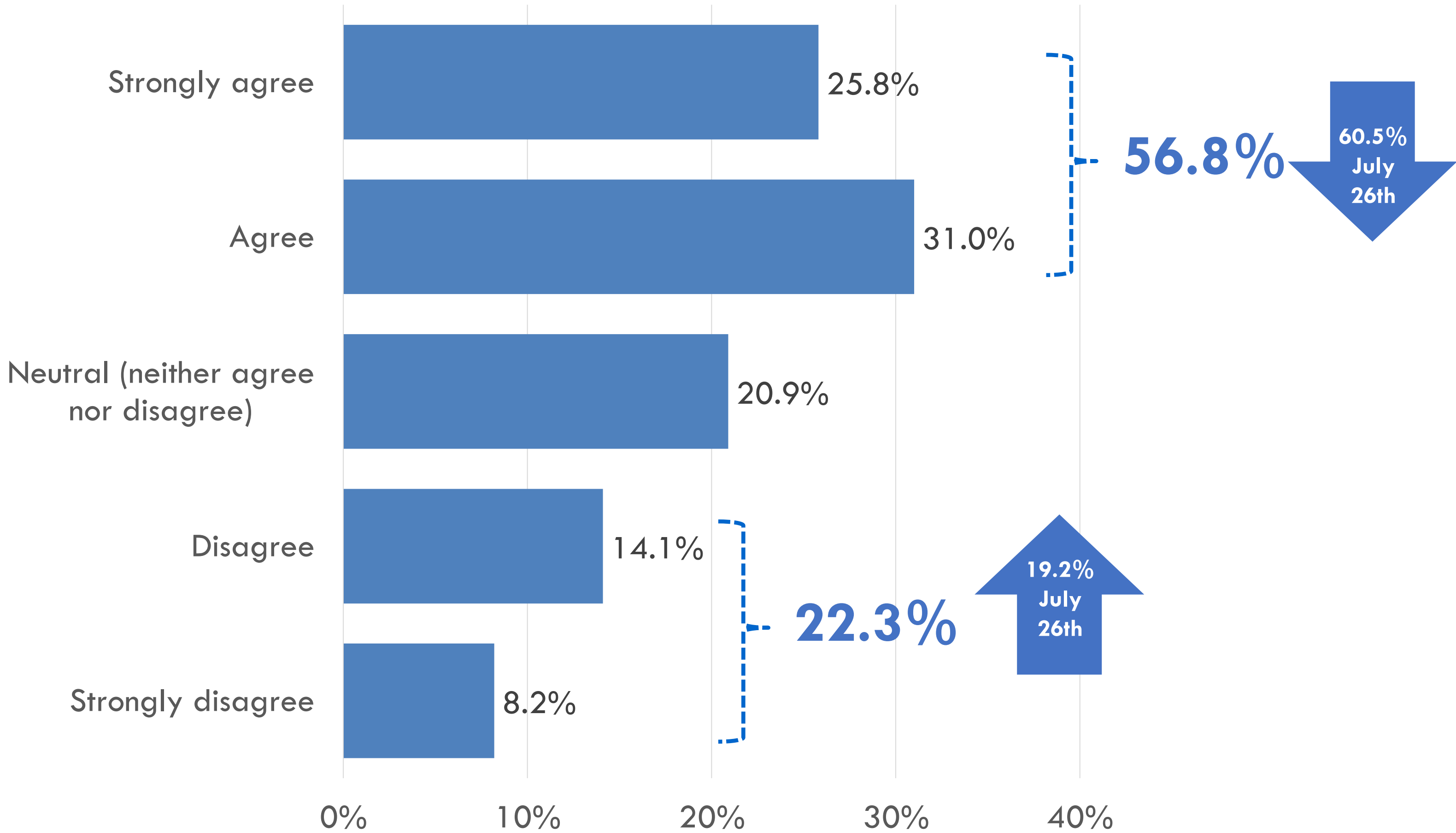
EXCITEMENT TO TRAVEL NOW

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

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

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

52.9%

53.0% Last week

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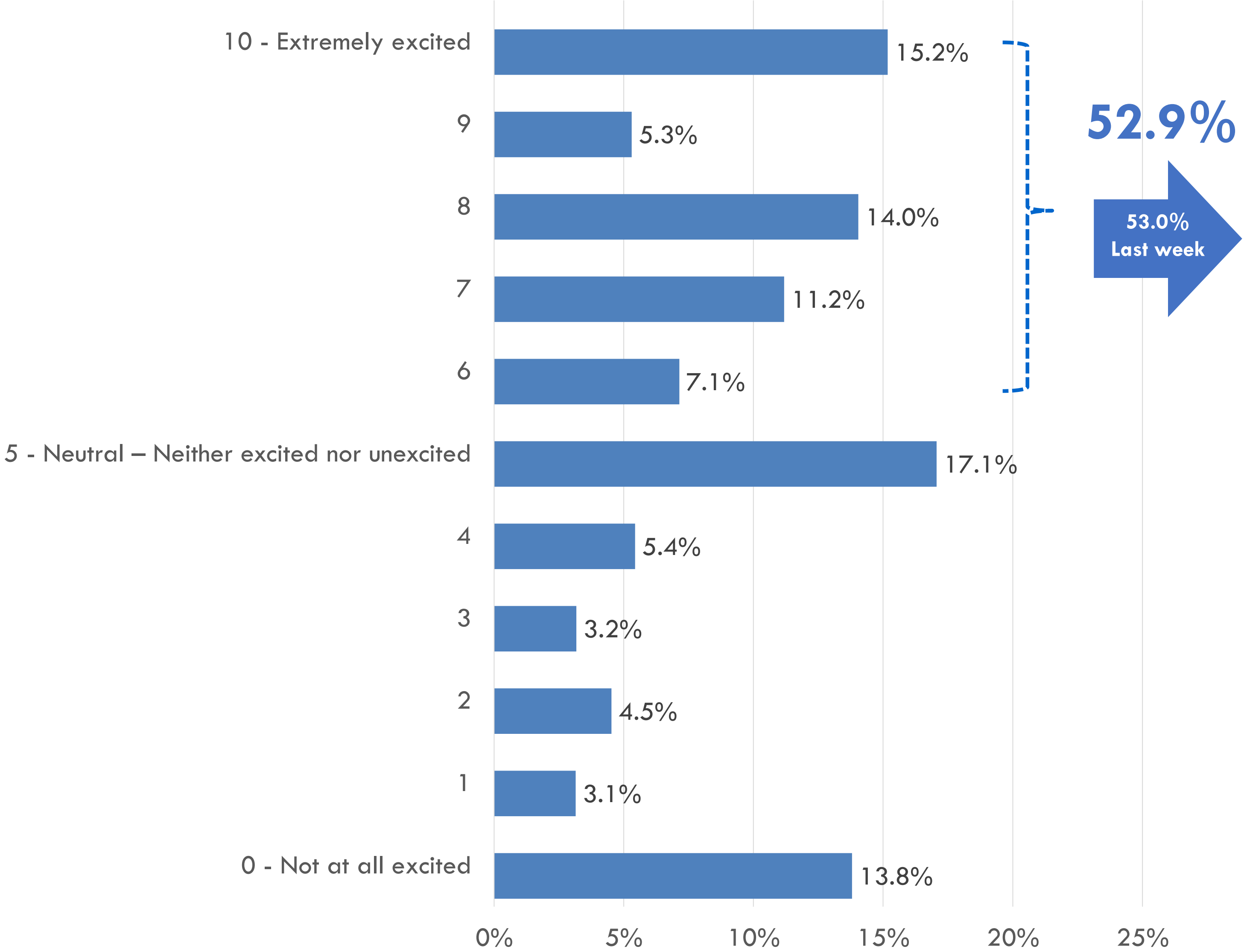
OPENNESS TO TRAVEL INFORMATION

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

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

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

51.8%

49.4% last week

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OPENNESS TO TRAVEL INSPIRATION
MARCH – SEPTEMBER
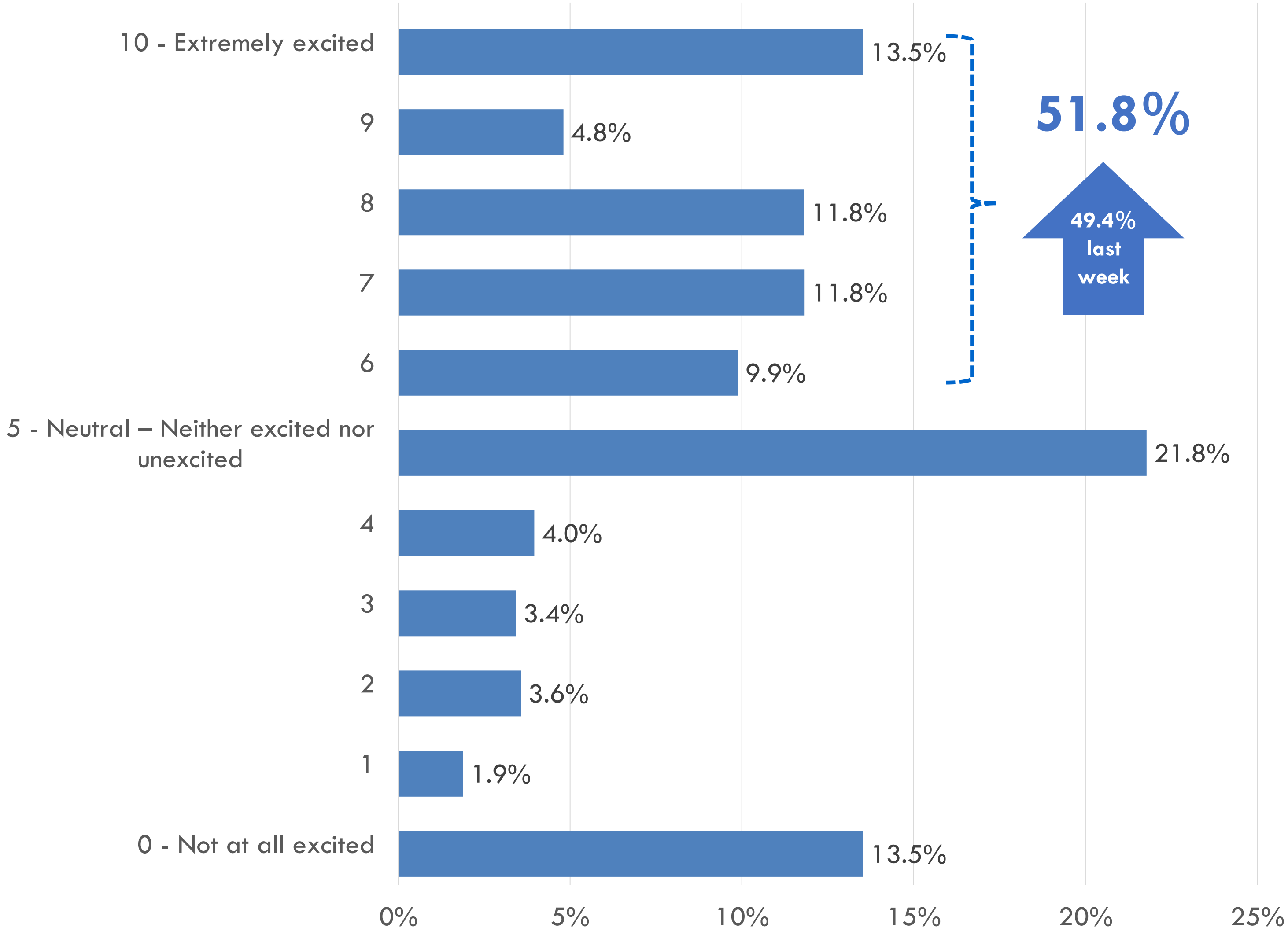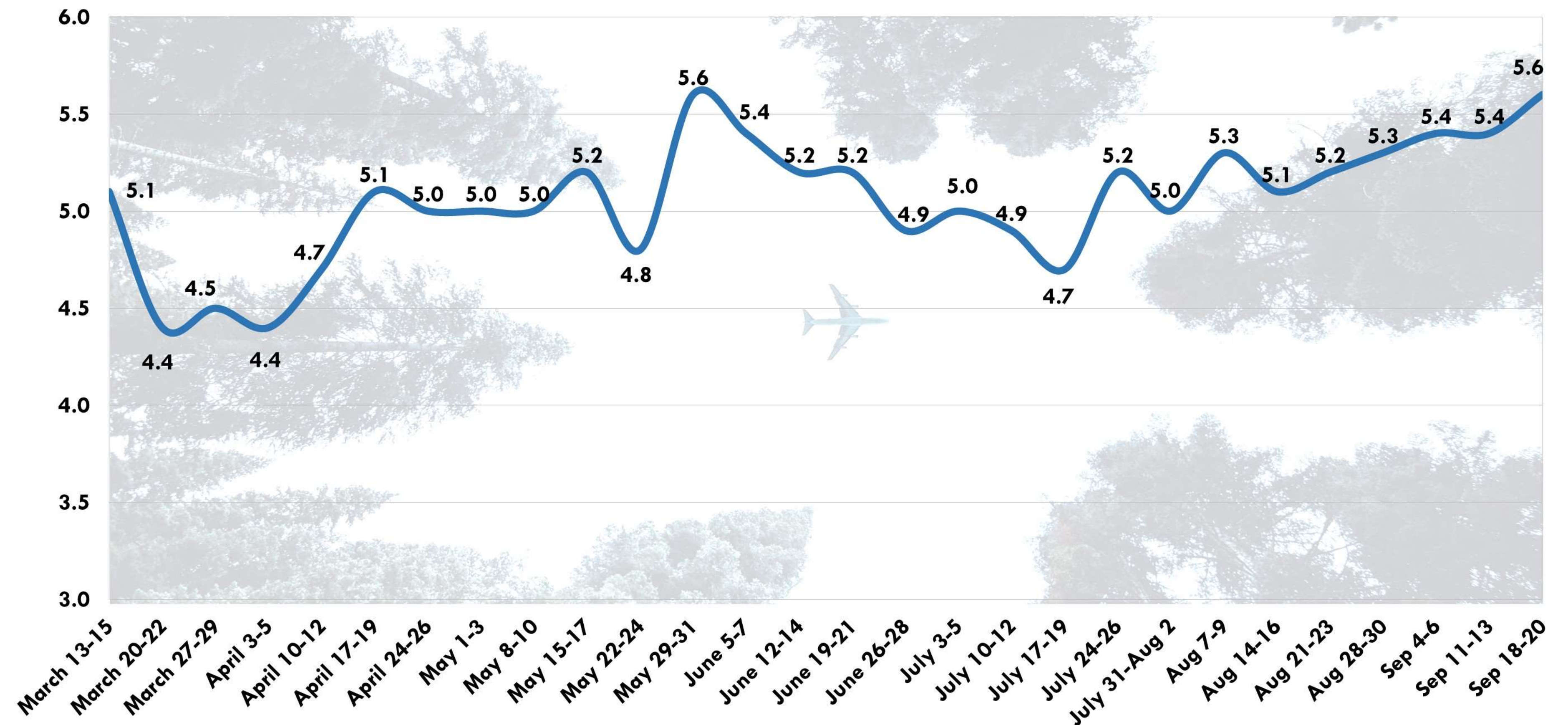
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

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

OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE)

Data values by wave:
- March 13-15: 5.1
- March 20-22: 4.4
- March 27-29: 4.5
- April 3-5: 4.4
- April 10-12: 4.7
- April 17-19: 5.1
- April 24-26: 5.0
- May 1-3: 5.0
- May 8-10: 5.0
- May 15-17: 5.2
- May 22-24: 4.8
- May 29-31: 5.6
- June 5-7: 5.4
- June 12-14: 5.2
- June 19-21: 5.2
- June 26-28: 4.9
- July 3-5: 5.0
- July 10-12: 4.9
- July 17-19: 4.7
- July 24-26: 5.2
- July 31-Aug 2: 5.0
- Aug 7-9: 5.3
- Aug 14-16: 5.1
- Aug 21-23: 5.2
- Aug 28-30: 5.3
- Sep 4-6: 5.4
- Sep 11-13: 5.4
- Sep 18-20: 5.6

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UPCOMING TRAVEL PLANS

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?
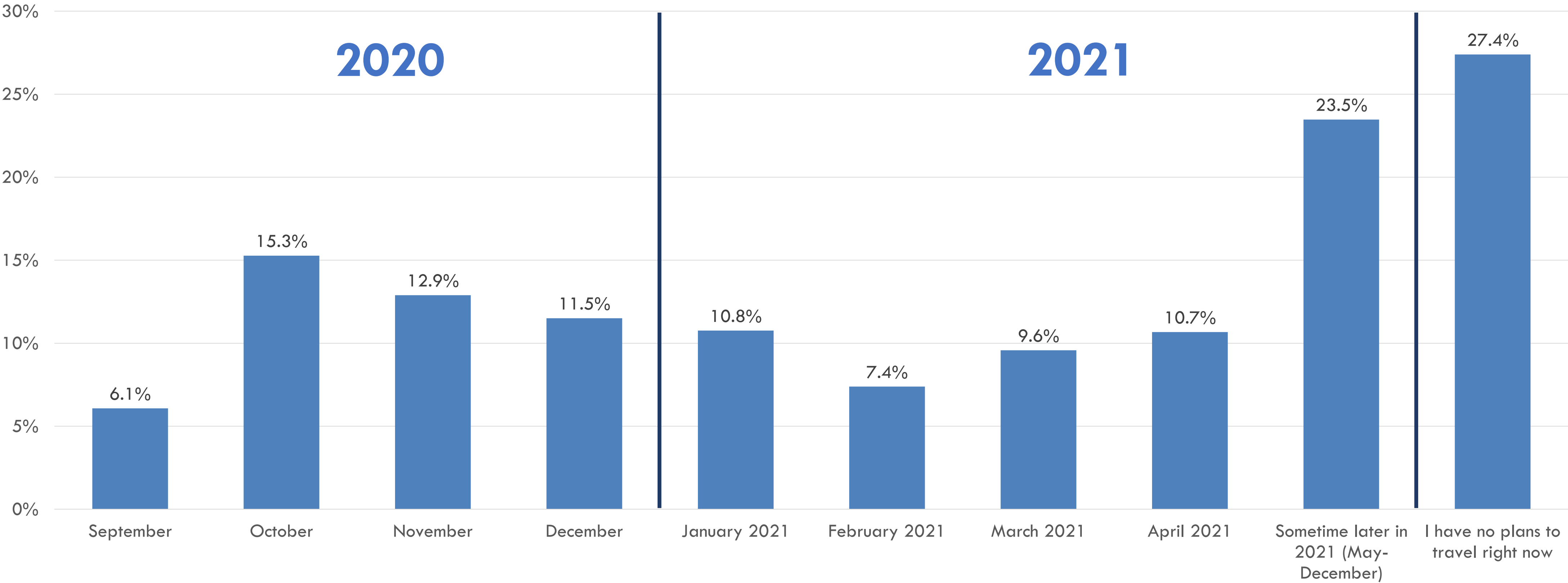
2020

2021

- September: 6.1%
- October: 15.3%
- November: 12.9%
- December: 11.5%
- January 2021: 10.8%
- February 2021: 7.4%
- March 2021: 9.6%
- April 2021: 10.7%
- Sometime later in 2021 (May-December): 23.5%
- I have no plans to travel right now: 27.4%

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

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ROAD & AIR TRIPS EXPECTED

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

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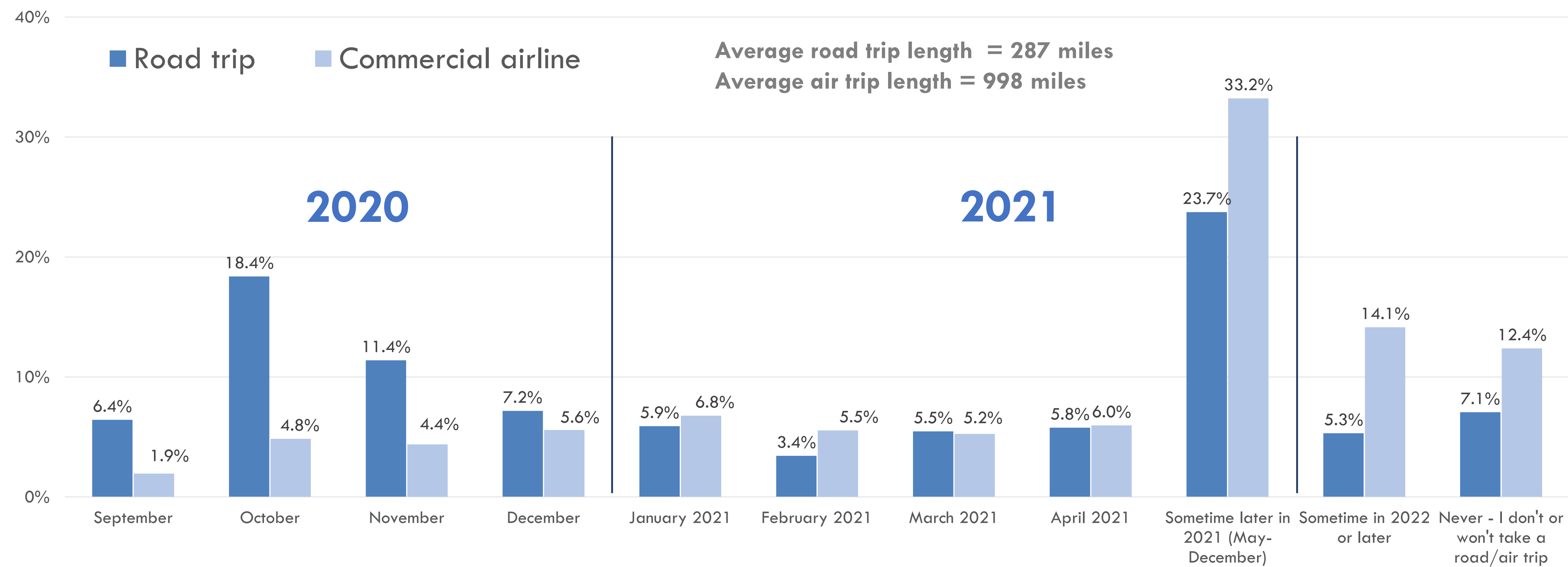
Average road trip length = 287 miles
Average air trip length = 998 miles

- ■ Road trip
- ■ Commercial airline

2020

2021

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

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

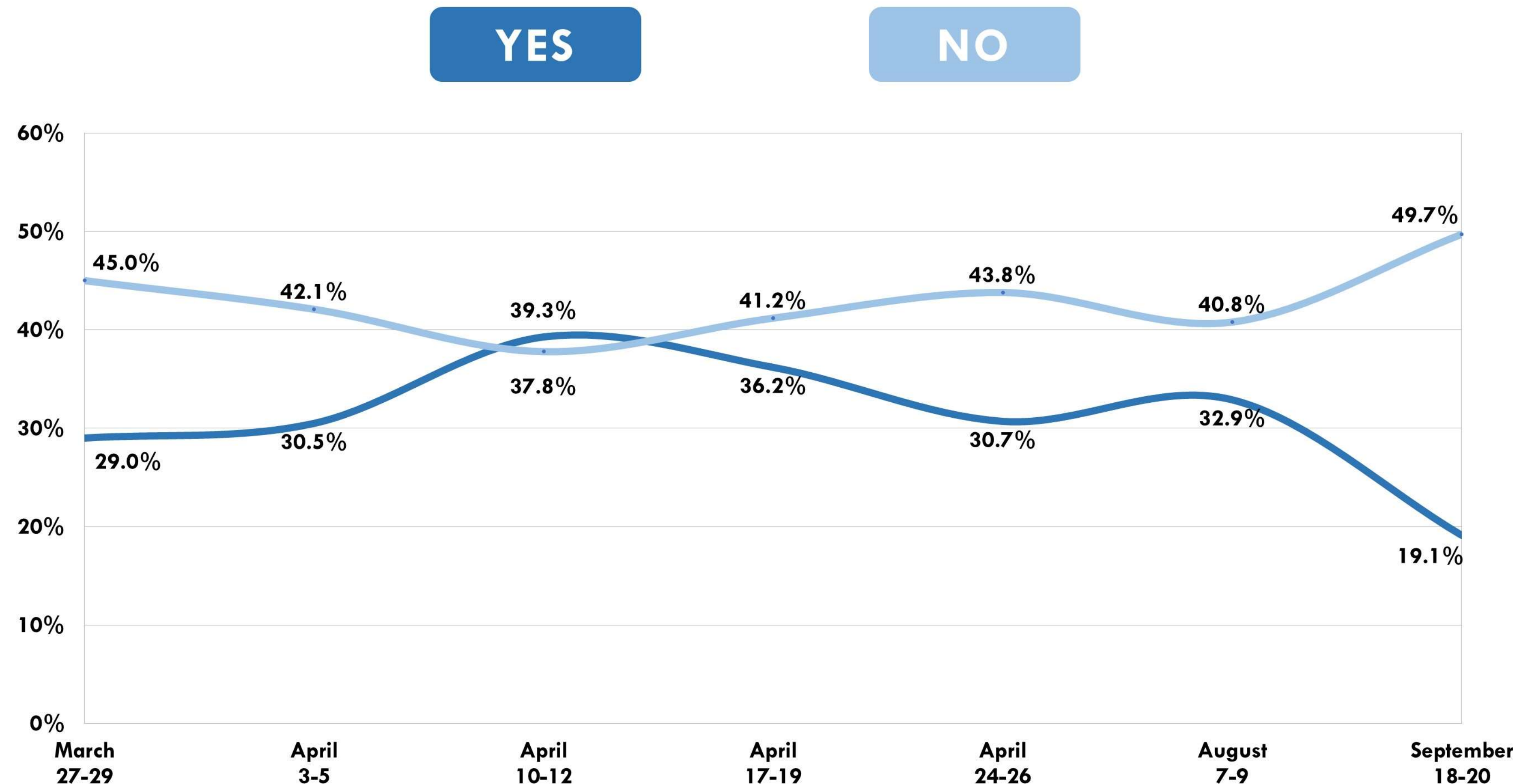Destination Analysts
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EXPECTATIONS TO CHANGE TRAVEL DESTINATIONS AFTER THE PANDEMIC

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

YES   NO

	March 27-29	April 3-5	April 10-12	April 17-19	April 24-26	August 7-9	September 18-20
YES	29.0%	30.5%	37.8%	36.2%	30.7%	32.9%	19.1%
NO	45.0%	42.1%	39.3%	41.2%	43.8%	40.8%	49.7%

Destination Analysts
DO YOUR RESEARCH

KEY TAKEAWAYS

- There's a stability and holding pattern in many ways Americans view the pandemic and travel right now

- Unlike the early months of coronavirus, less than half of American travelers now consider major tenets of a trip to be unsafe. Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic

- Openness to travel continues to bloom. The level of excitement for learning about new travel experiences or destinations to visit is once again at a pandemic-period high

- Far fewer Americans are saying they are going to change the types of travel destinations they choose to visit post-pandemic
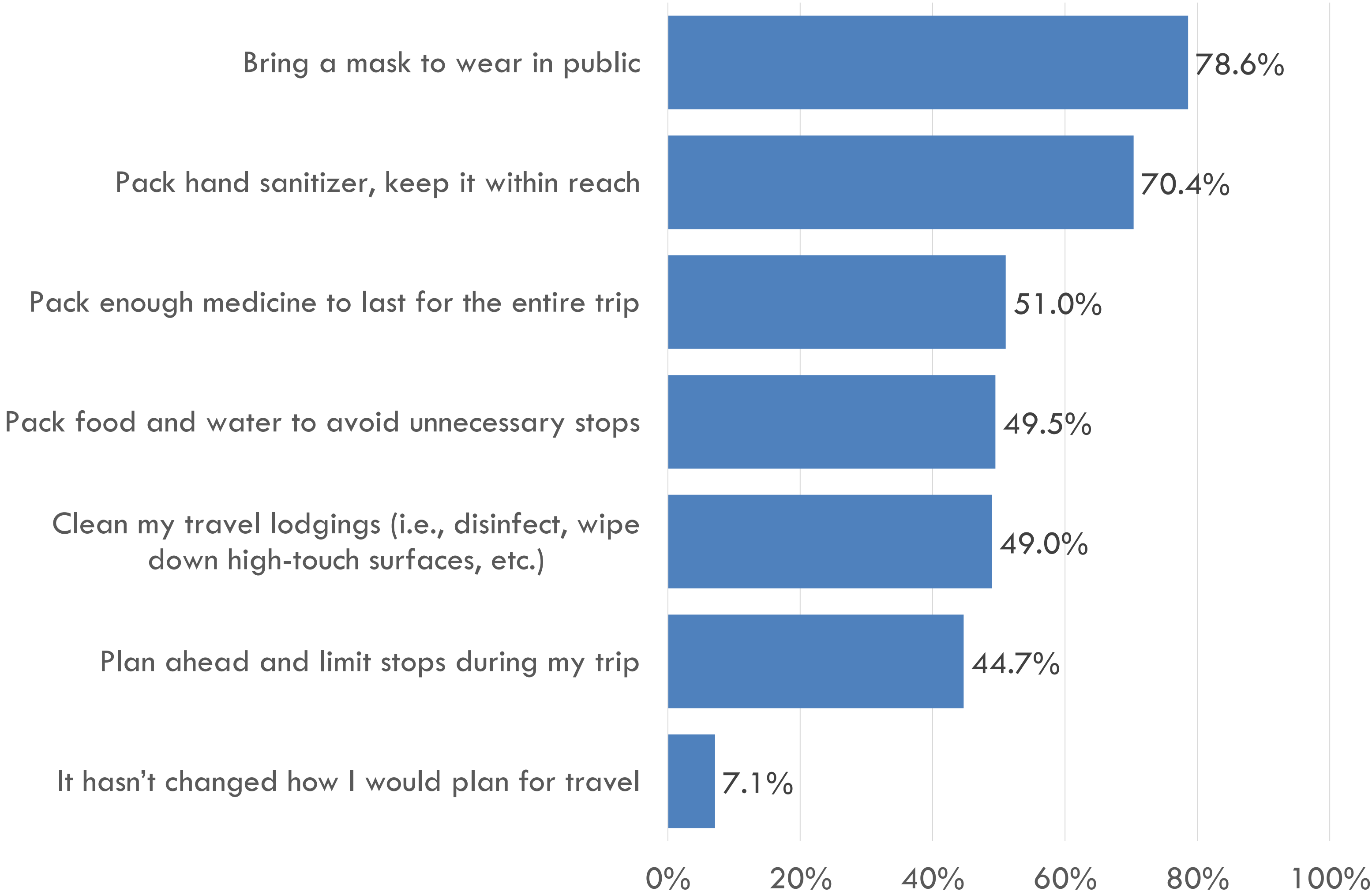
Pandemic Travel Behaviors

PANDEMIC'S IMPACT ON TRAVEL PLANNING

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

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

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

Bring a mask to wear in public — 78.6%

Pack hand sanitizer, keep it within reach — 70.4%

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

Pack food and water to avoid unnecessary stops — 49.5%

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

Plan ahead and limit stops during my trip — 44.7%

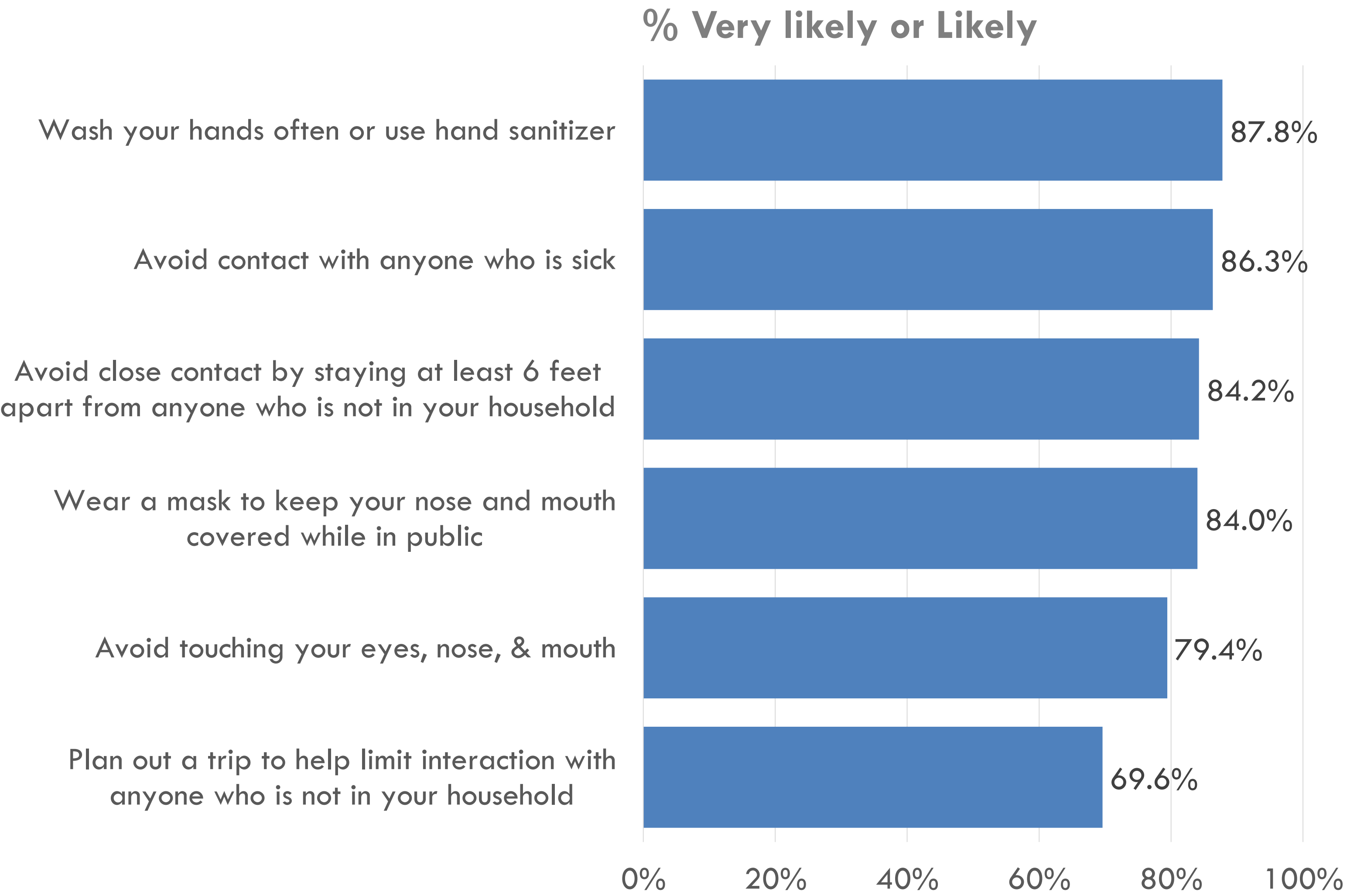It hasn't changed how I would plan for travel — 7.1%

LIKELY TRAVEL BEHAVIORS

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

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

% Very likely or Likely

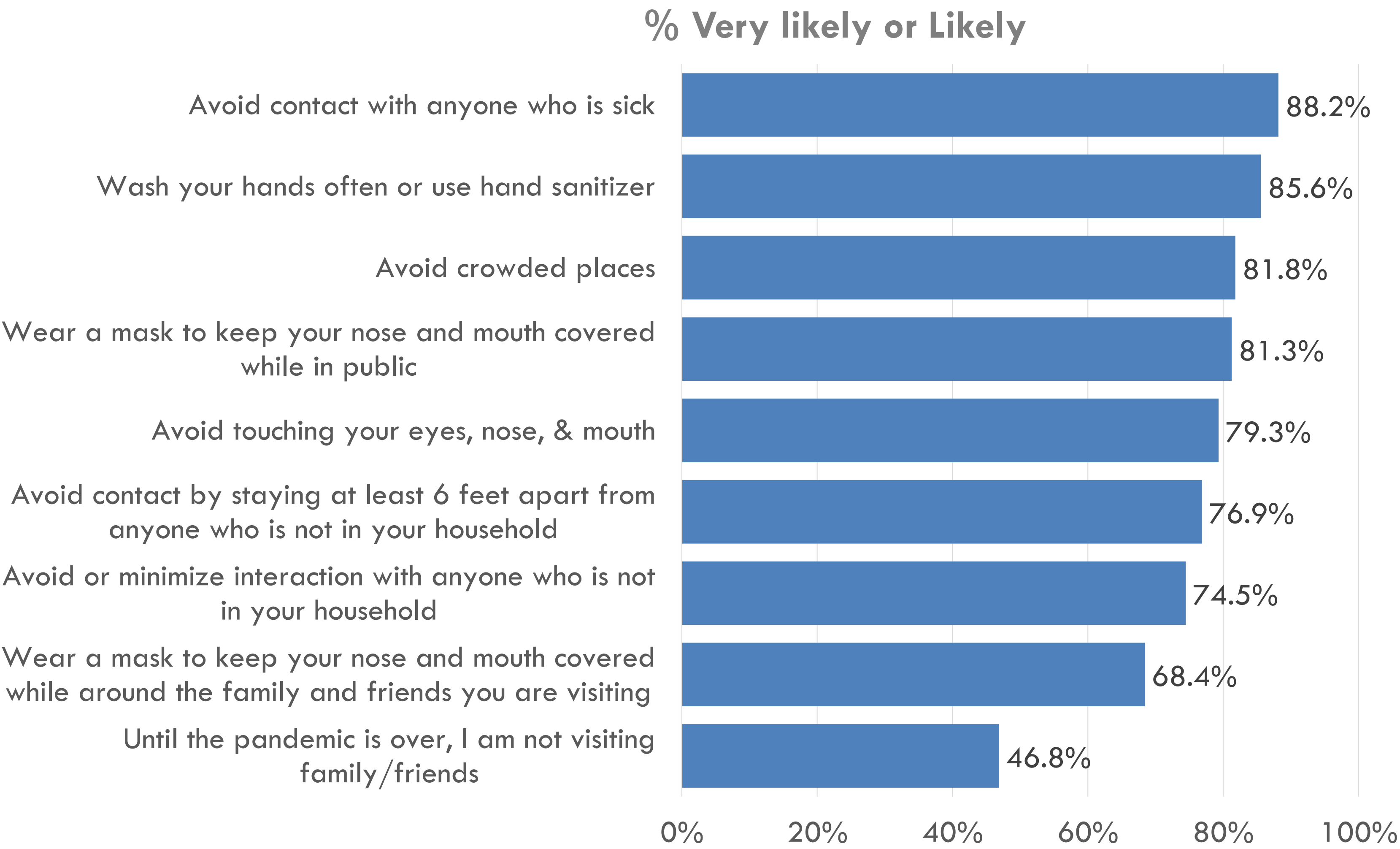| Behavior	%
Wash your hands often or use hand sanitizer	87.8%
Avoid contact with anyone who is sick	86.3%
Avoid close contact by staying at least 6 feet apart from anyone who is not in your household	84.2%
Wear a mask to keep your nose and mouth covered while in public	84.0%
Avoid touching your eyes, nose, & mouth	79.4%
Plan out a trip to help limit interaction with anyone who is not in your household	69.6%

LIKELY BEHAVIORS FOR VISITING FRIENDS & FAMILY

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

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

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

% Very likely or Likely

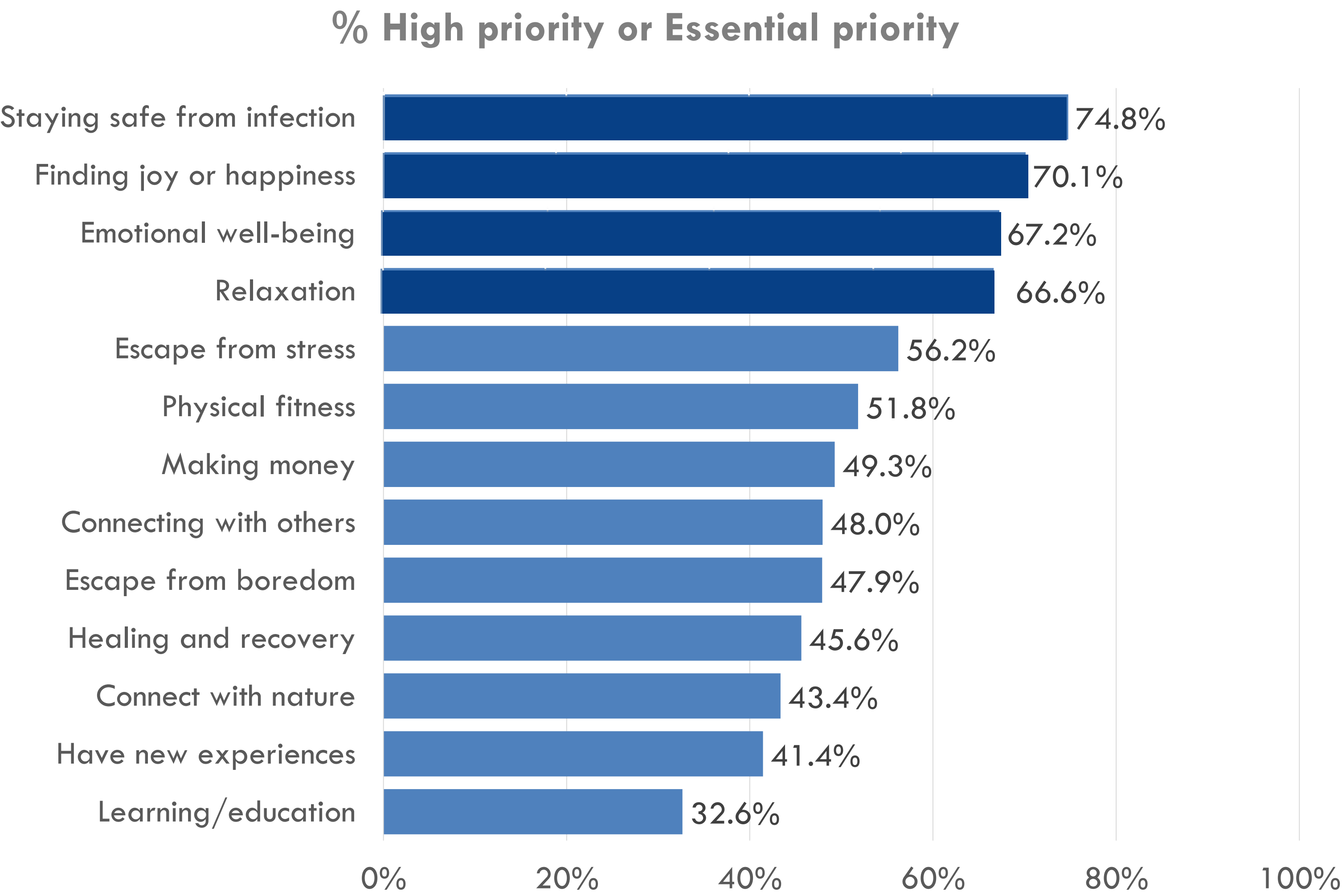| Behavior	%
Avoid contact with anyone who is sick	88.2%
Wash your hands often or use hand sanitizer	85.6%
Avoid crowded places	81.8%
Wear a mask to keep your nose and mouth covered while in public	81.3%
Avoid touching your eyes, nose, & mouth	79.3%
Avoid contact by staying at least 6 feet apart from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

Lifestyle Priorities
in the Pandemic

LIFESTYLE PRIORITIES

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

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

% High priority or Essential priority

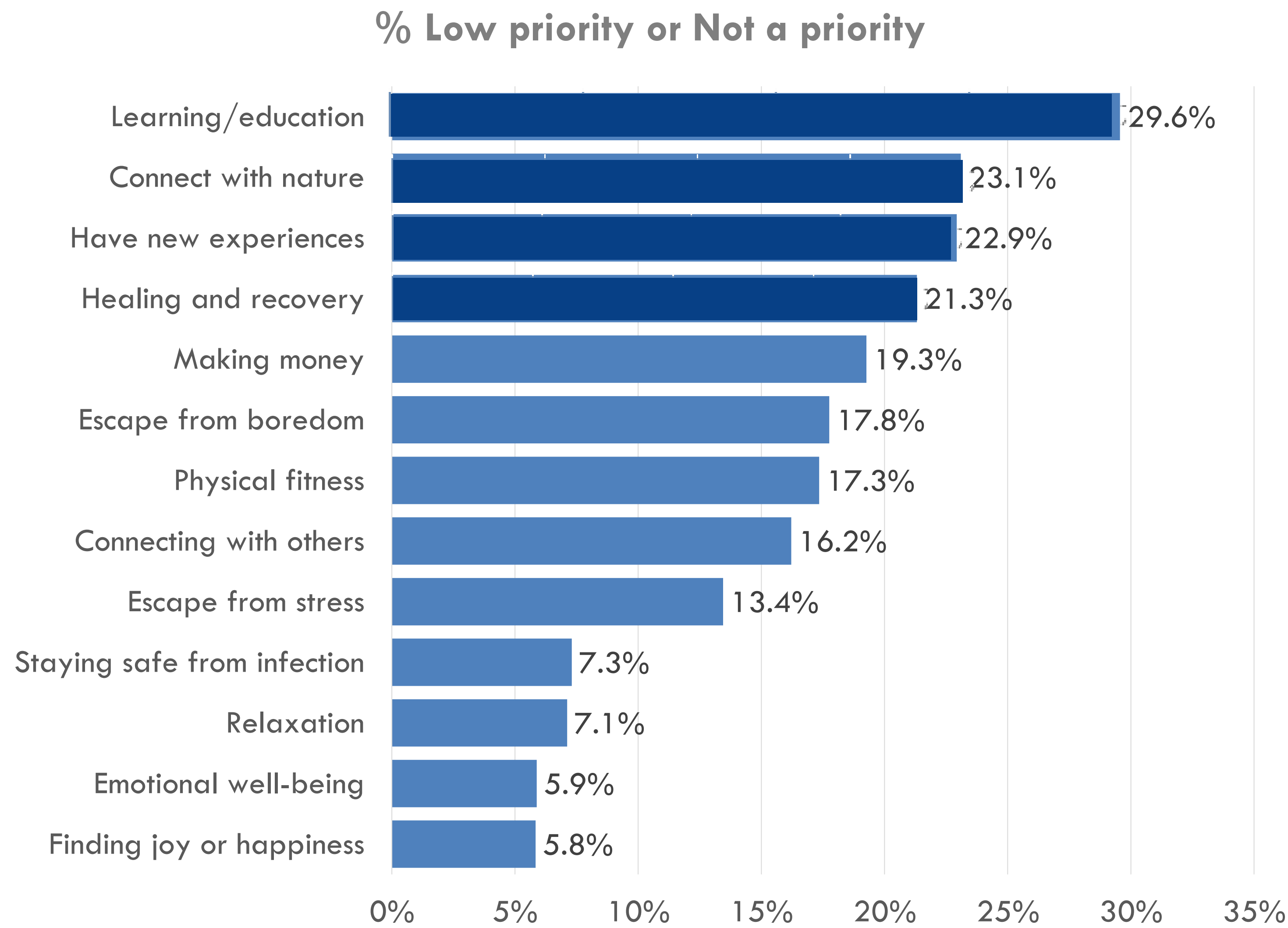| Priority	%
Staying safe from infection	74.8%
Finding joy or happiness	70.1%
Emotional well-being	67.2%
Relaxation	66.6%
Escape from stress	56.2%
Physical fitness	51.8%
Making money	49.3%
Connecting with others	48.0%
Escape from boredom	47.9%
Healing and recovery	45.6%
Connect with nature	43.4%
Have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

LIFESTYLE PRIORITIES: THE FLIP-SIDE

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

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)
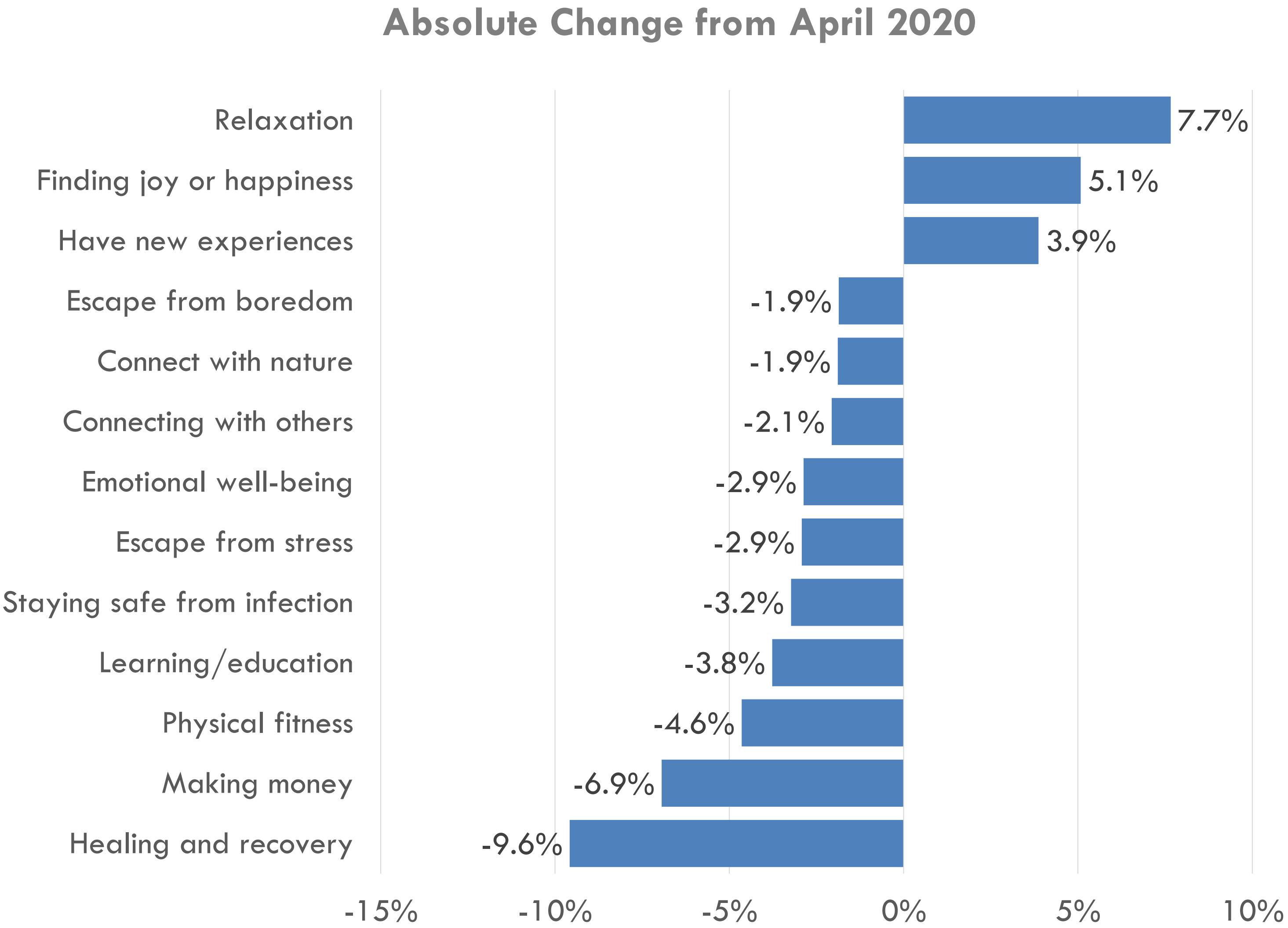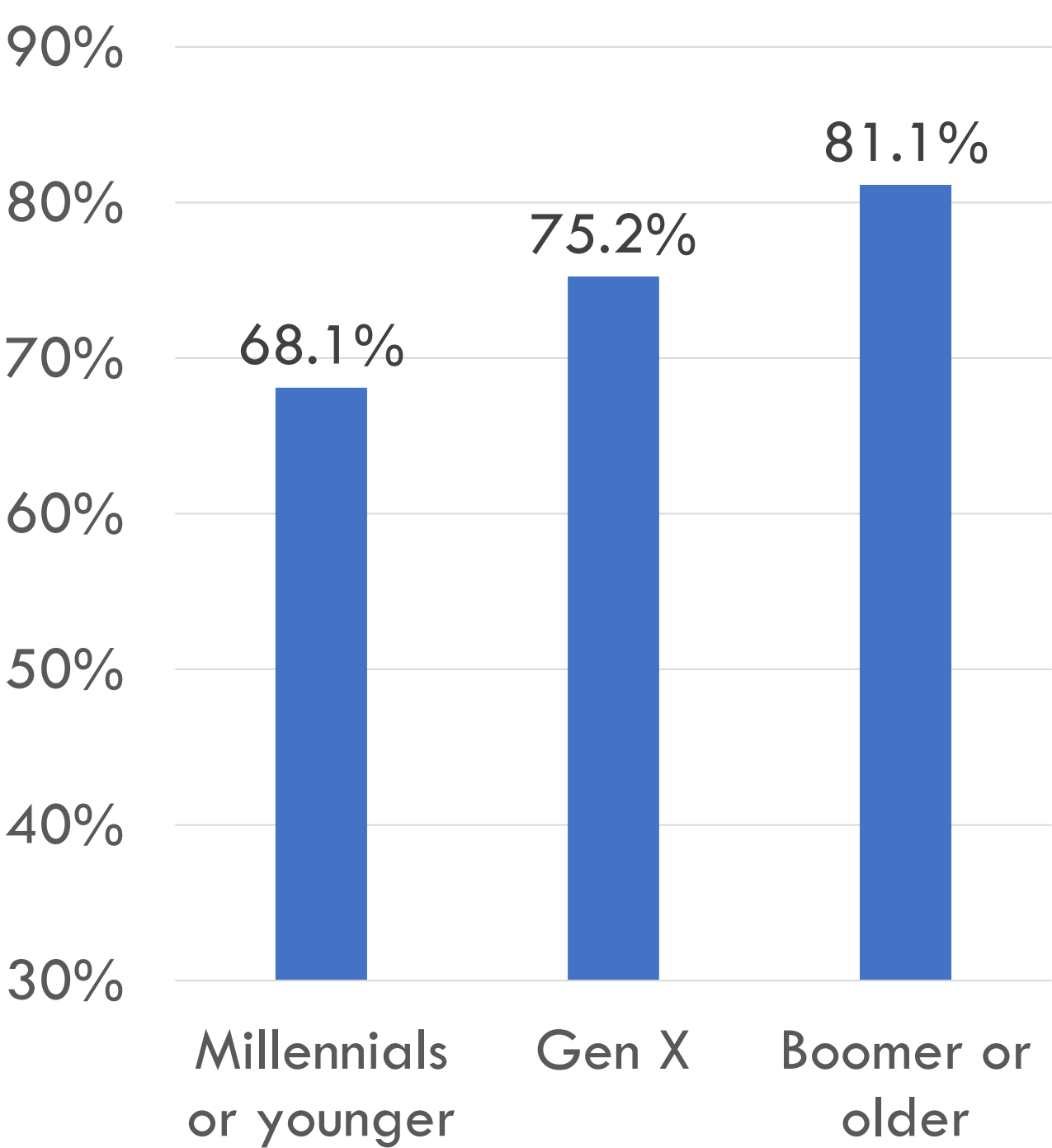
% Low priority or Not a priority

Category	%
Learning/education	29.6%
Connect with nature	23.1%
Have new experiences	22.9%
Healing and recovery	21.3%
Making money	19.3%
Escape from boredom	17.8%
Physical fitness	17.3%
Connecting with others	16.2%
Escape from stress	13.4%
Staying safe from infection	7.3%
Relaxation	7.1%
Emotional well-being	5.9%
Finding joy or happiness	5.8%

Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: WHAT'S CHANGING?

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

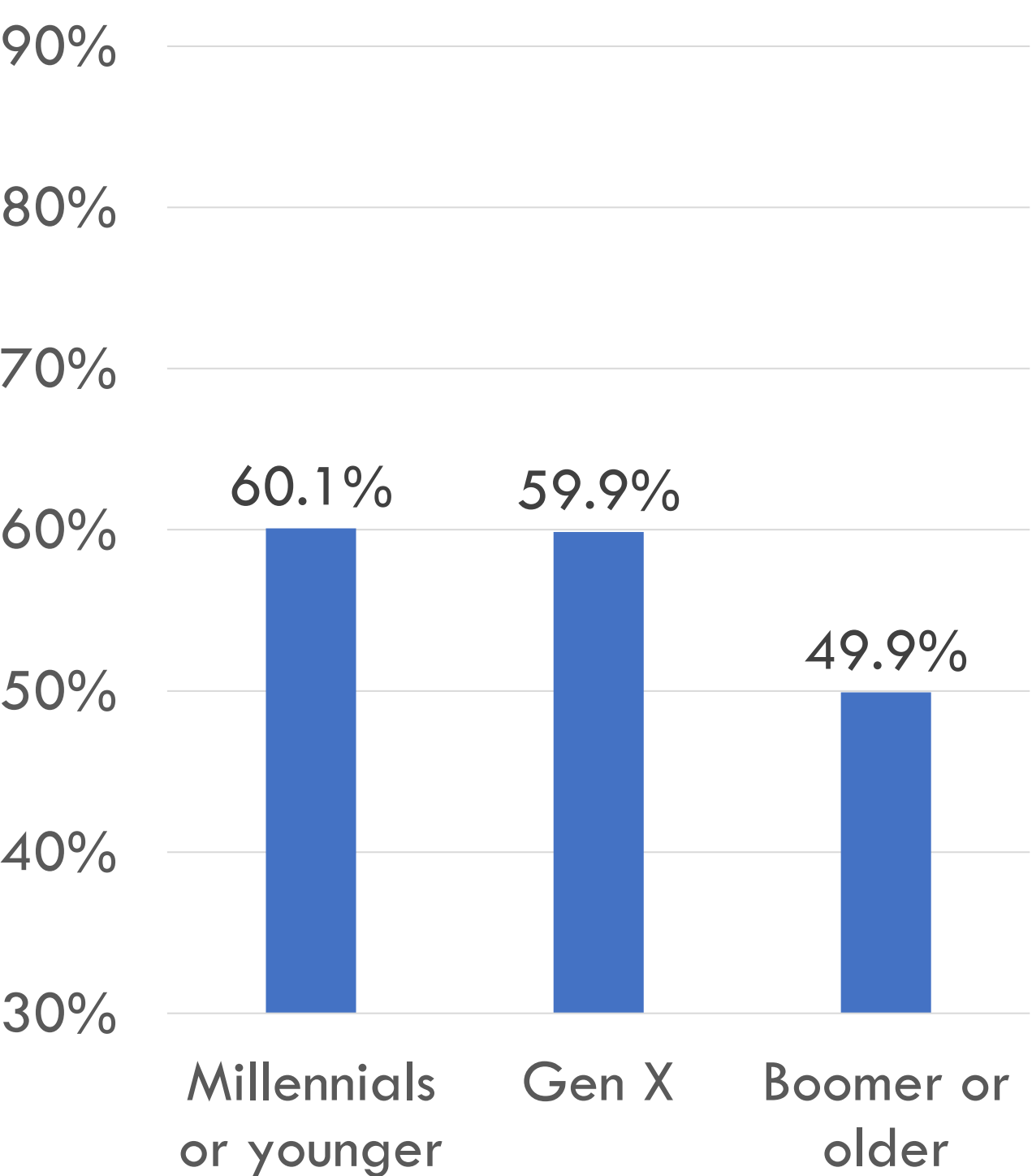*(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)*
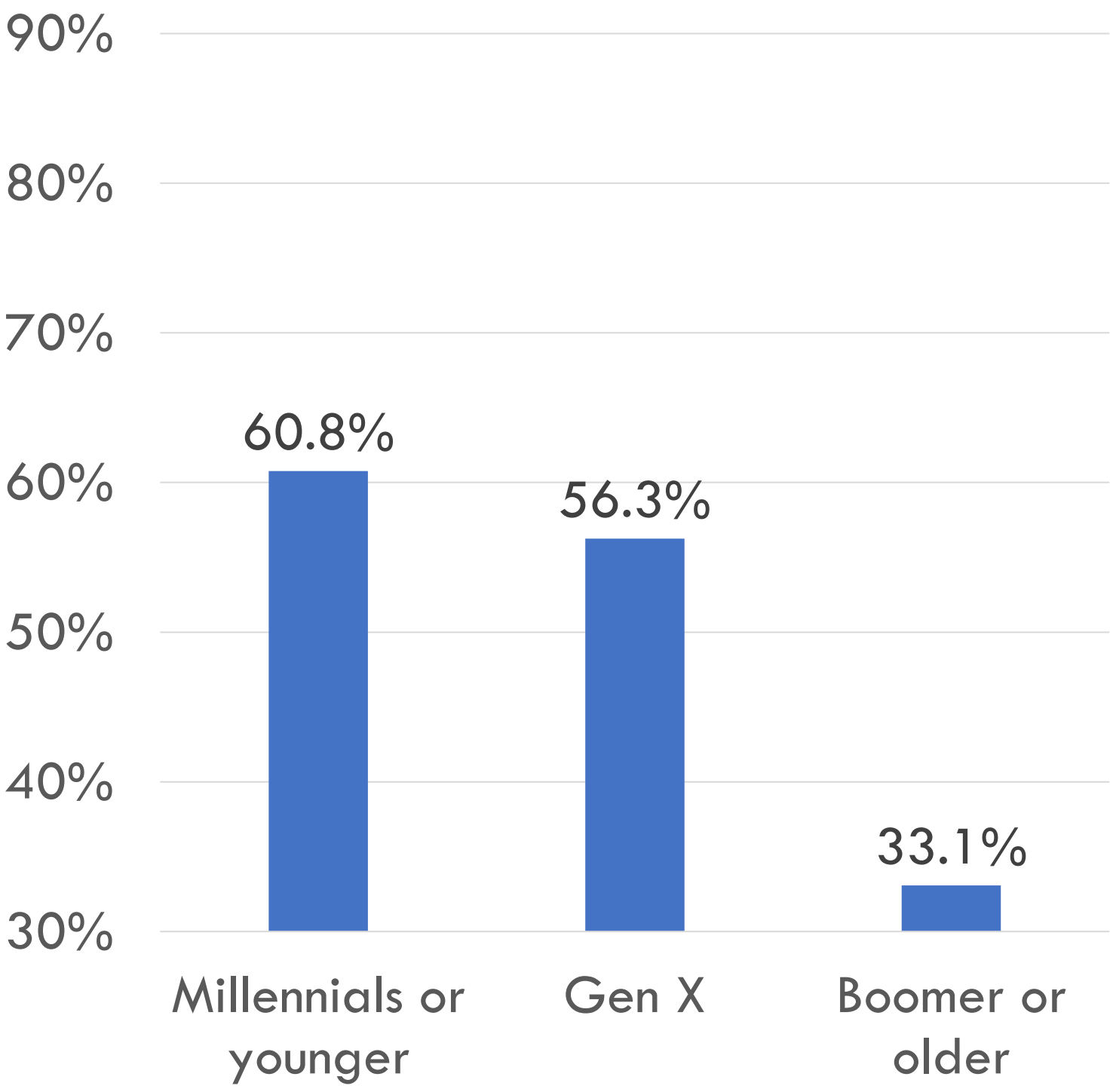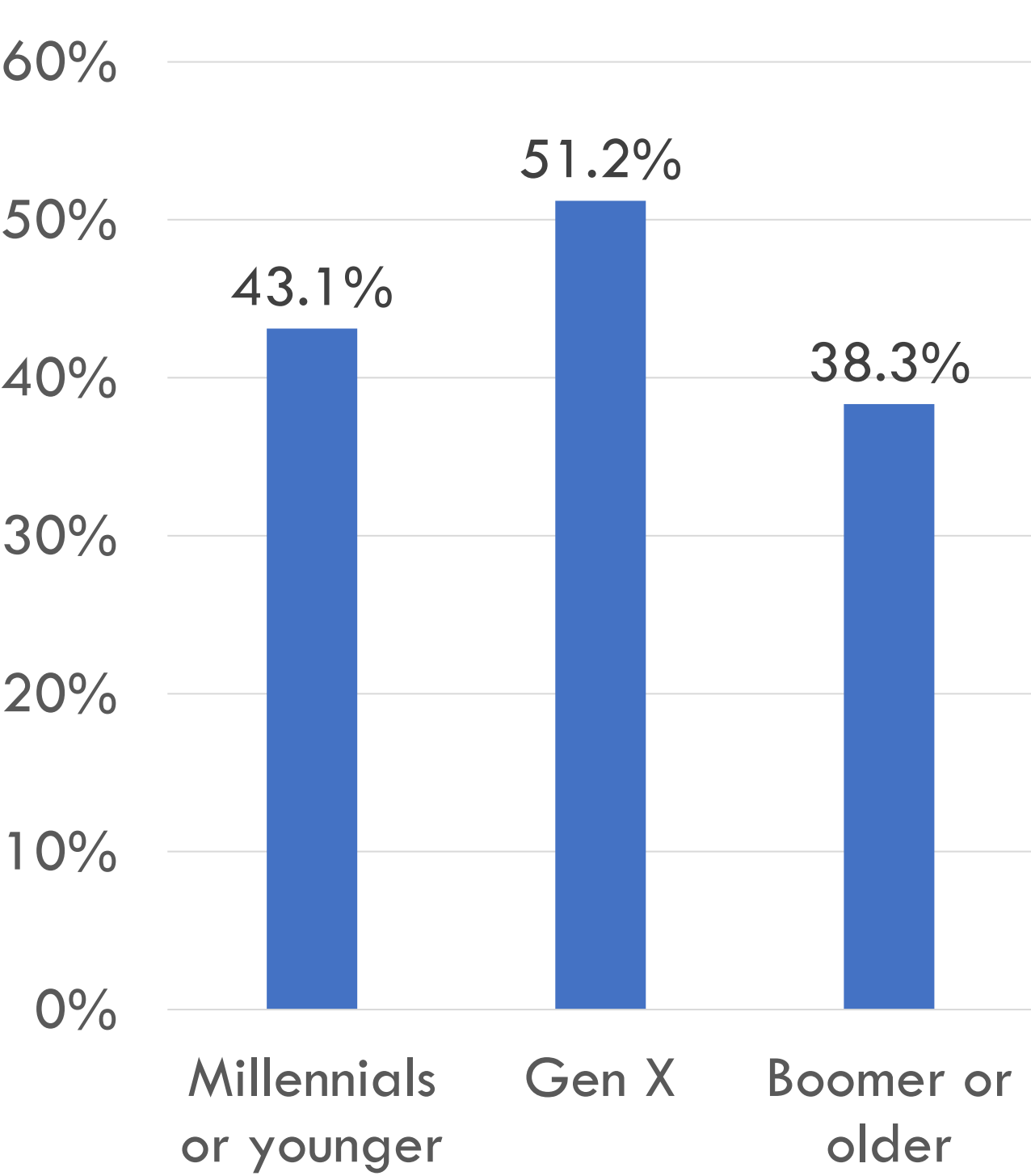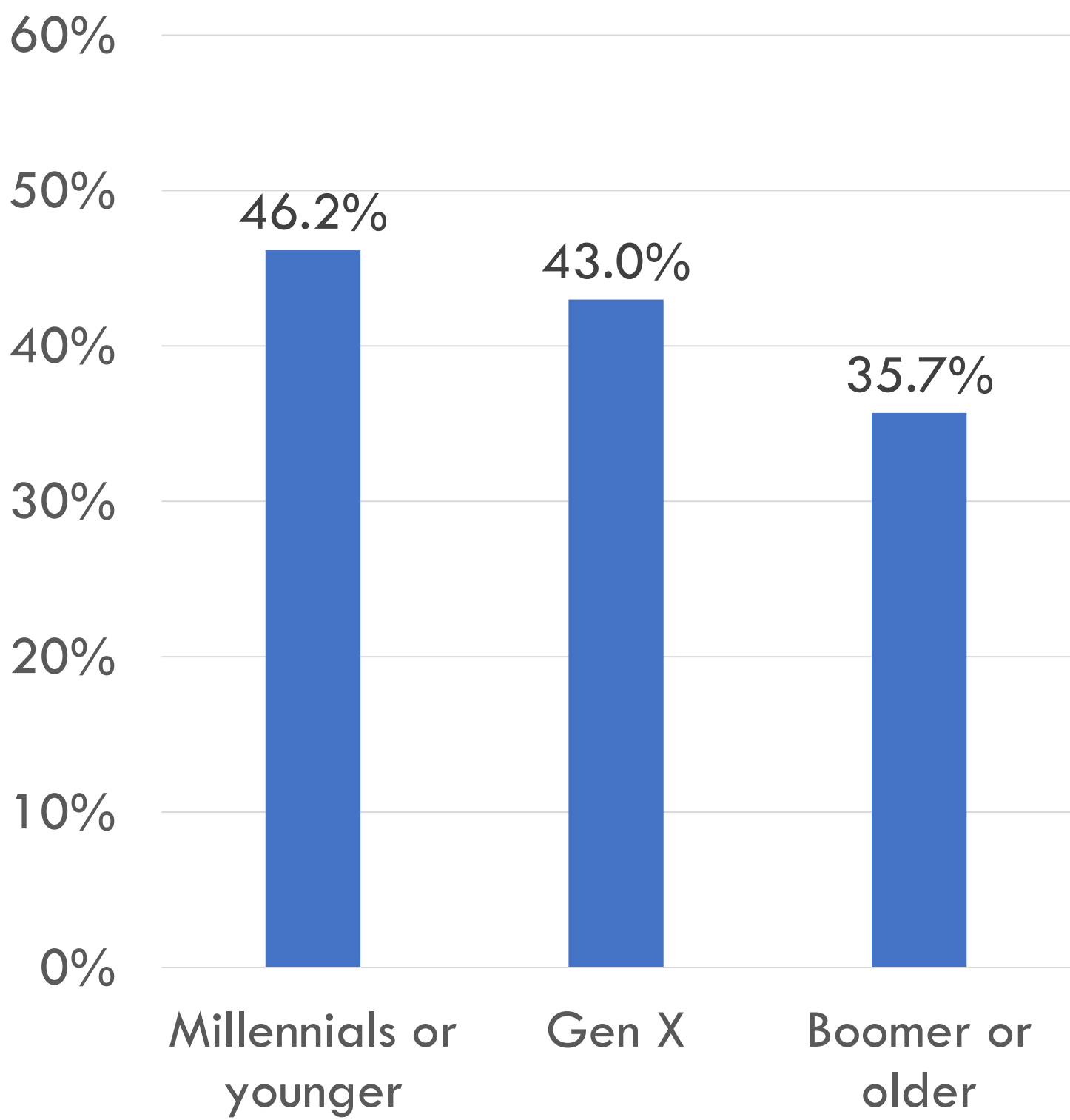
Absolute Change from April 2020

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

Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY GENERATION

Staying Safe from Infection

- Millennials or younger: 68.1%
- Gen X: 75.2%
- Boomer or older: 81.1%

Escape from Stress

- Millennials or younger: 60.1%
- Gen X: 59.9%
- Boomer or older: 49.9%

Making Money

- Millennials or younger: 60.8%
- Gen X: 56.3%
- Boomer or older: 33.1%

% High priority or Essential priority

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.
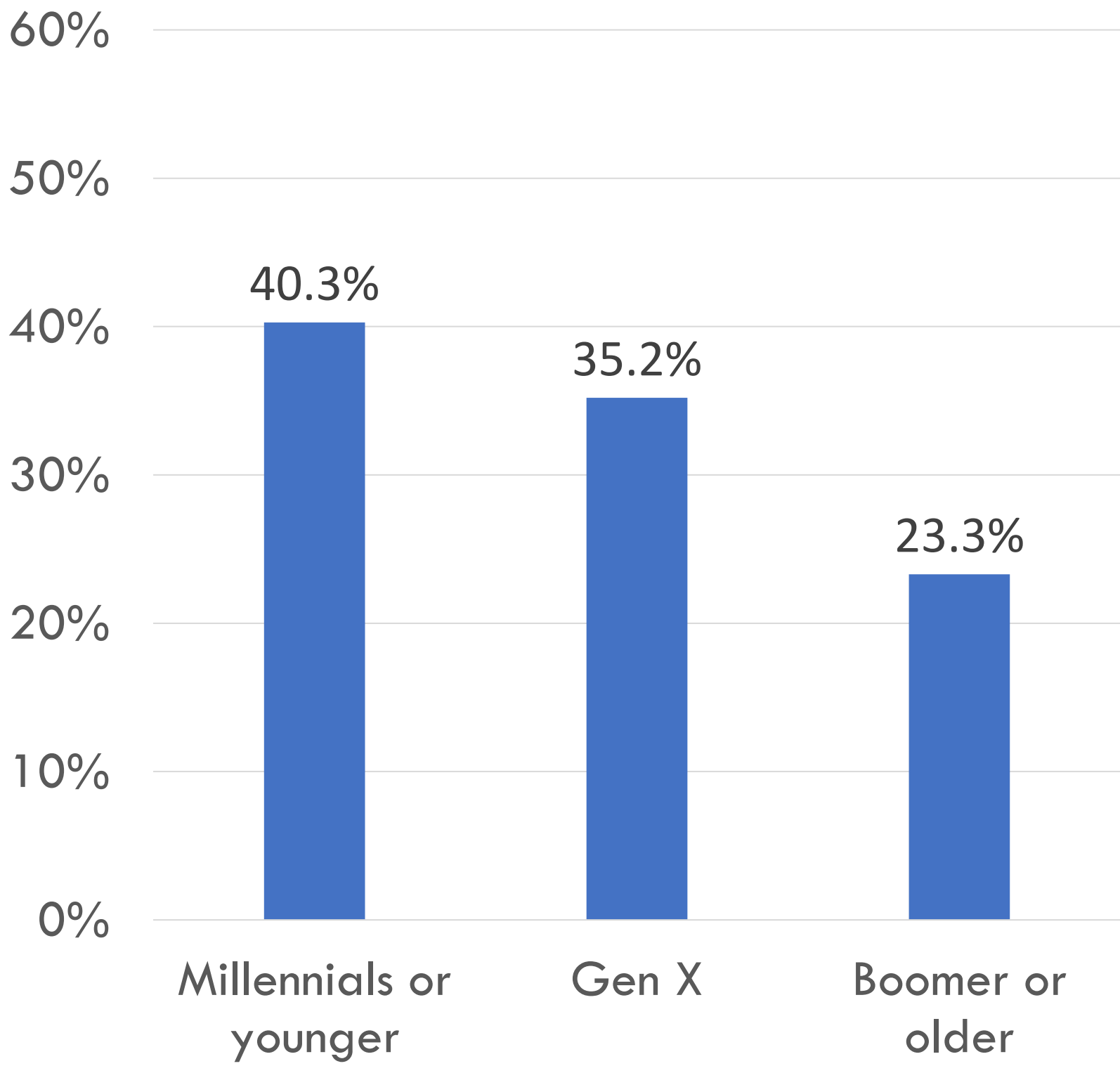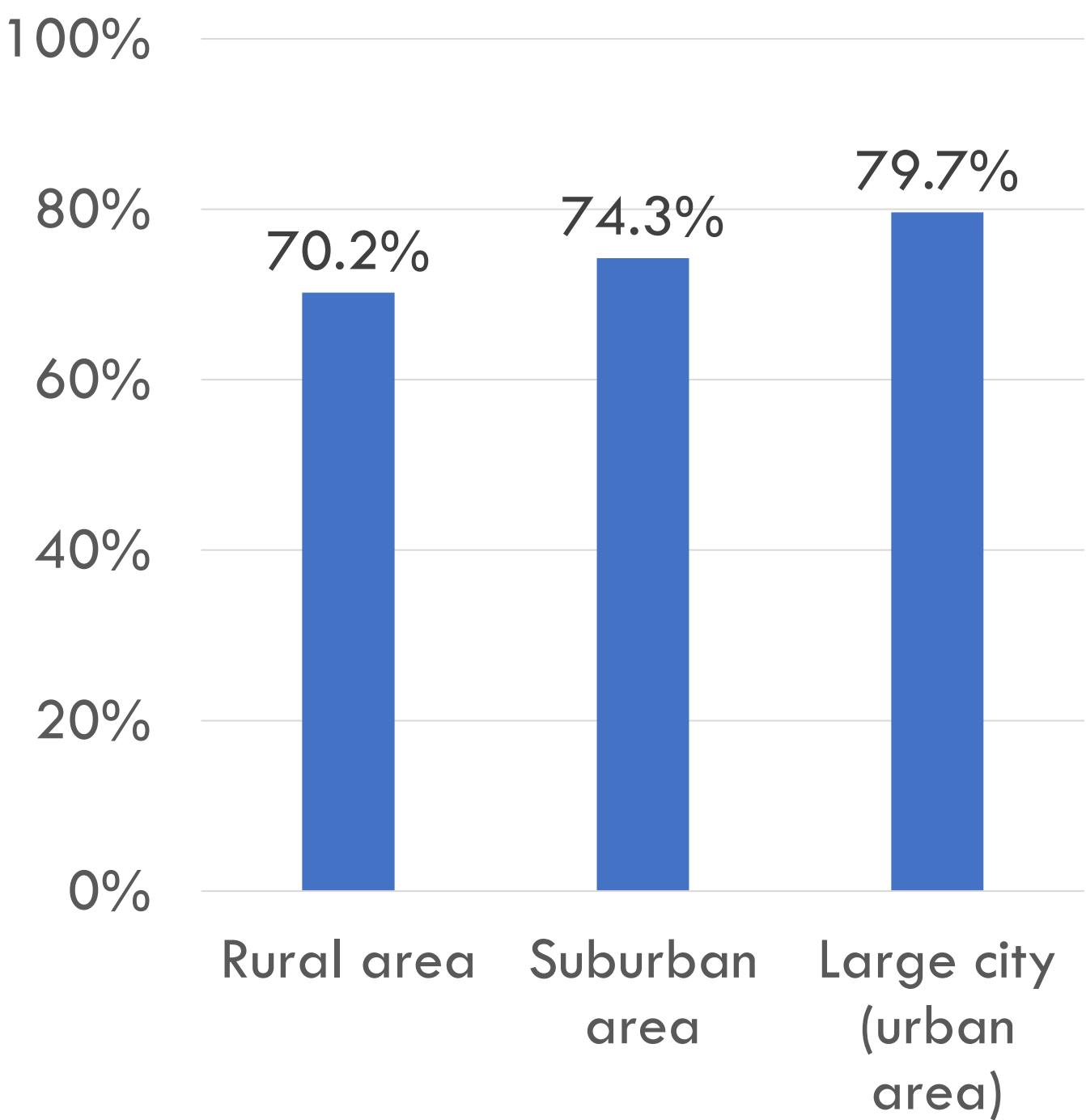
Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY GENERATION

Connect with Nature

- Millennials or younger: 43.1%
- Gen X: 51.2%
- Boomer or older: 38.3%

Have New Experiences

- Millennials or younger: 46.2%
- Gen X: 43.0%
- Boomer or older: 35.7%

Learning/Education

- Millennials or younger: 40.3%
- Gen X: 35.2%
- Boomer or older: 23.3%

% High priority or Essential priority

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.
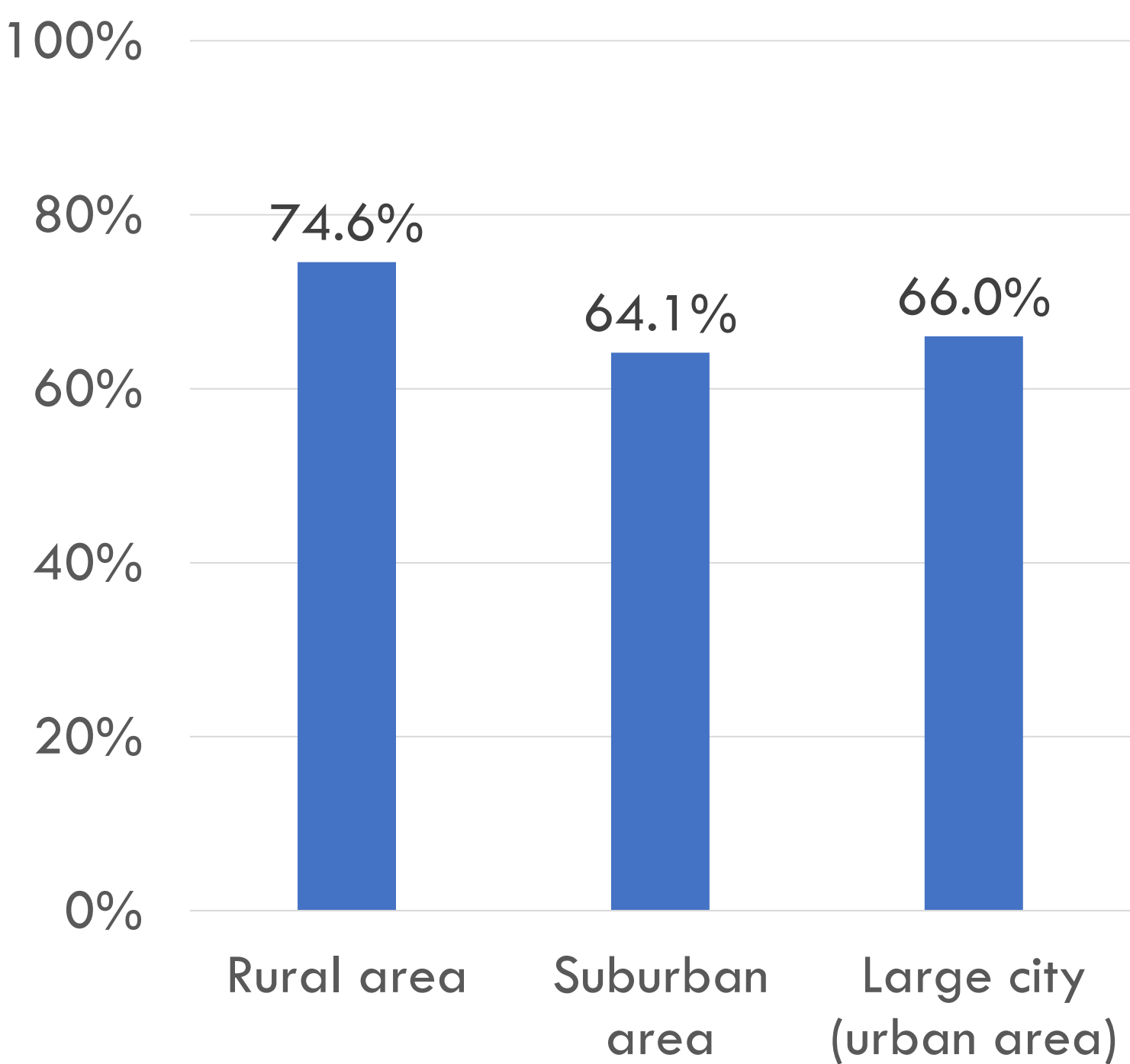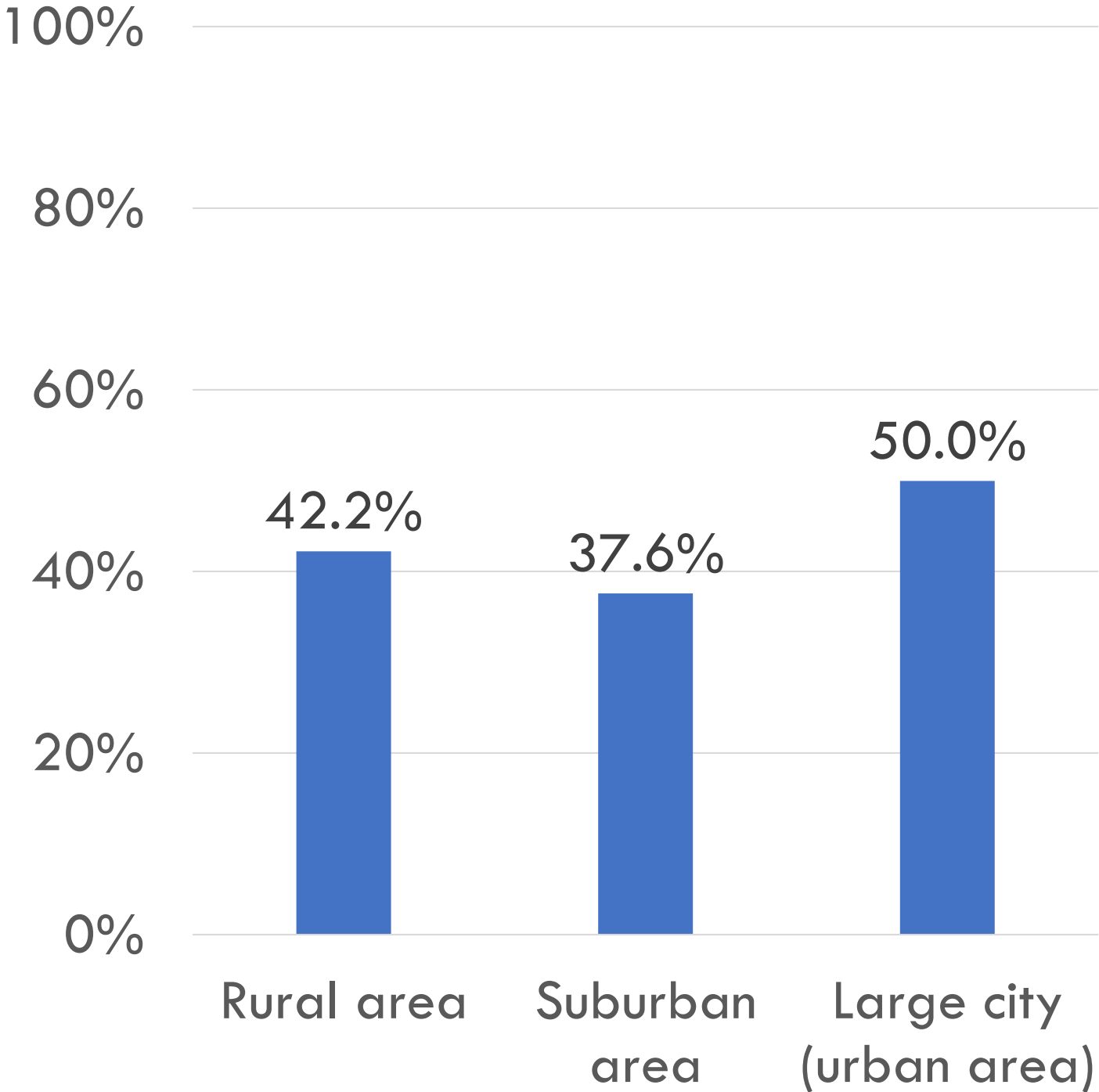
Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: PLACE OF RESIDENCE

Staying Safe from Infection

- Rural area: 70.2%
- Suburban area: 74.3%
- Large city (urban area): 79.7%

Relaxation

- Rural area: 74.6%
- Suburban area: 64.1%
- Large city (urban area): 66.0%

New Experiences

- Rural area: 42.2%
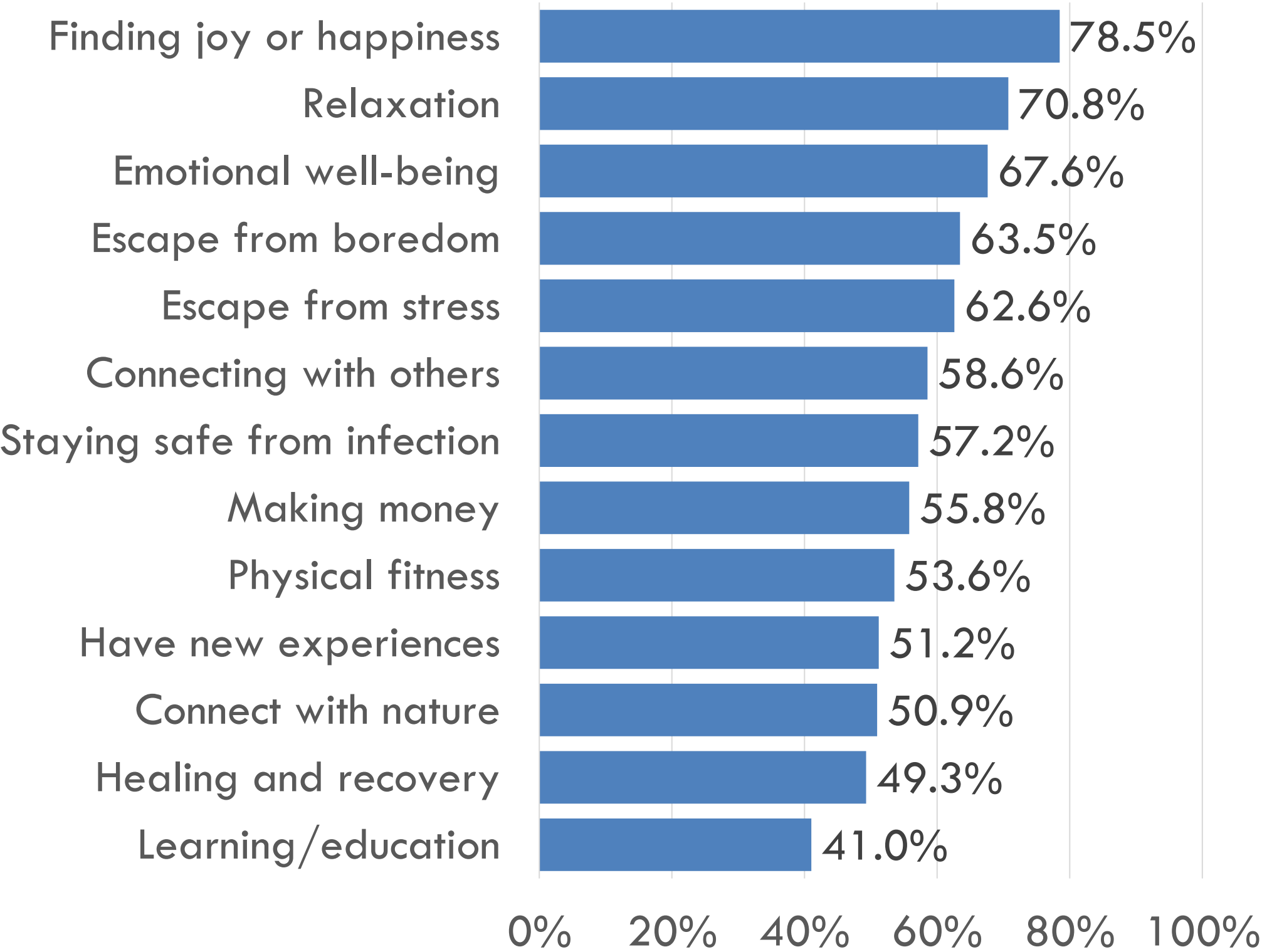- Suburban area: 37.6%
- Large city (urban area): 50.0%

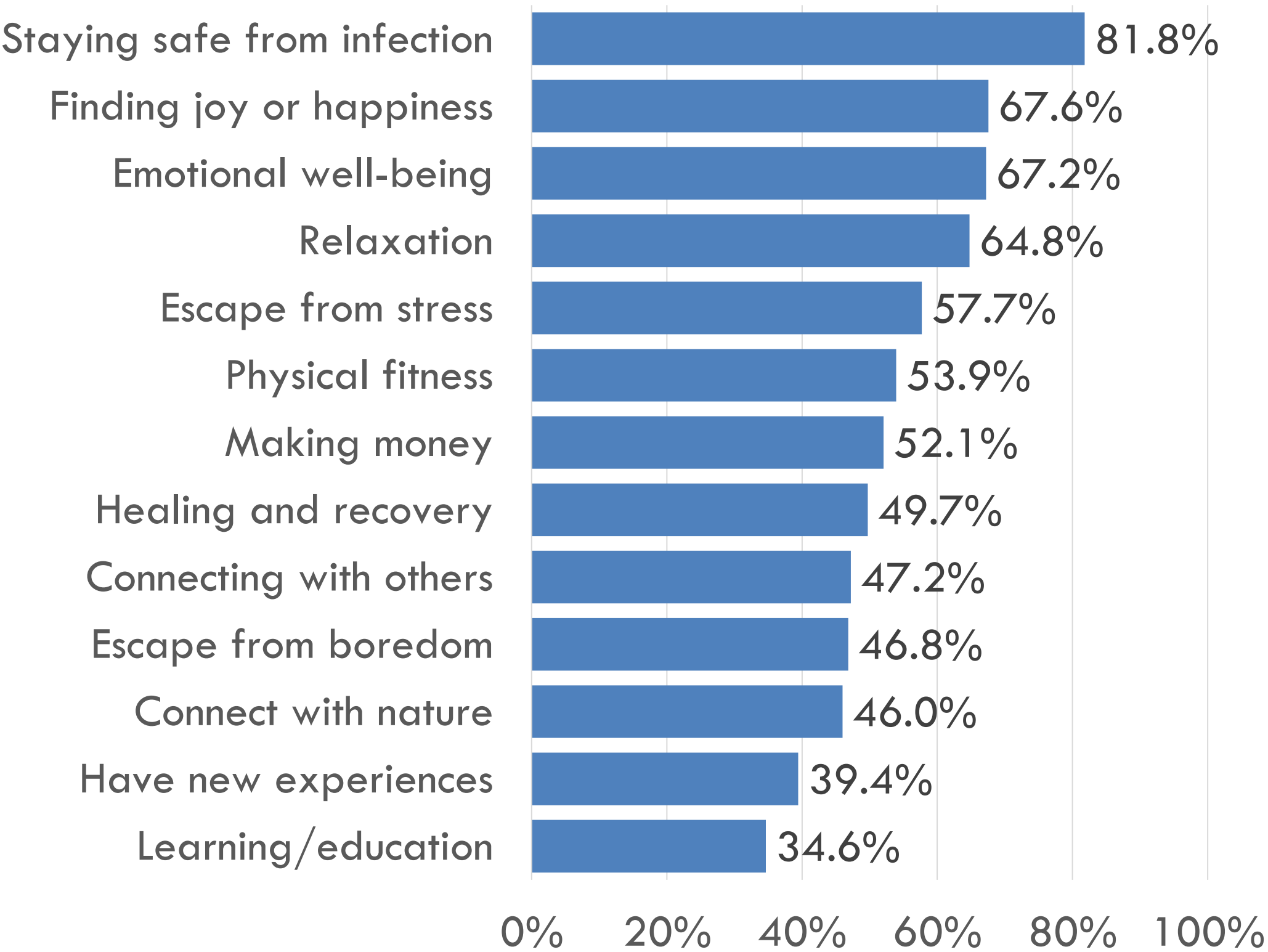## % High priority or Essential priority

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.

Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY READINESS TO TRAVEL

Already Traveling/Ready without Hesitation

Priority	%
Finding joy or happiness	78.5%
Relaxation	70.8%
Emotional well-being	67.6%
Escape from boredom	63.5%
Escape from stress	62.6%
Connecting with others	58.6%
Staying safe from infection	57.2%
Making money	55.8%
Physical fitness	53.6%
Have new experiences	51.2%
Connect with nature	50.9%
Healing and recovery	49.3%
Learning/education	41.0%

Need More Time or A Lot More Time

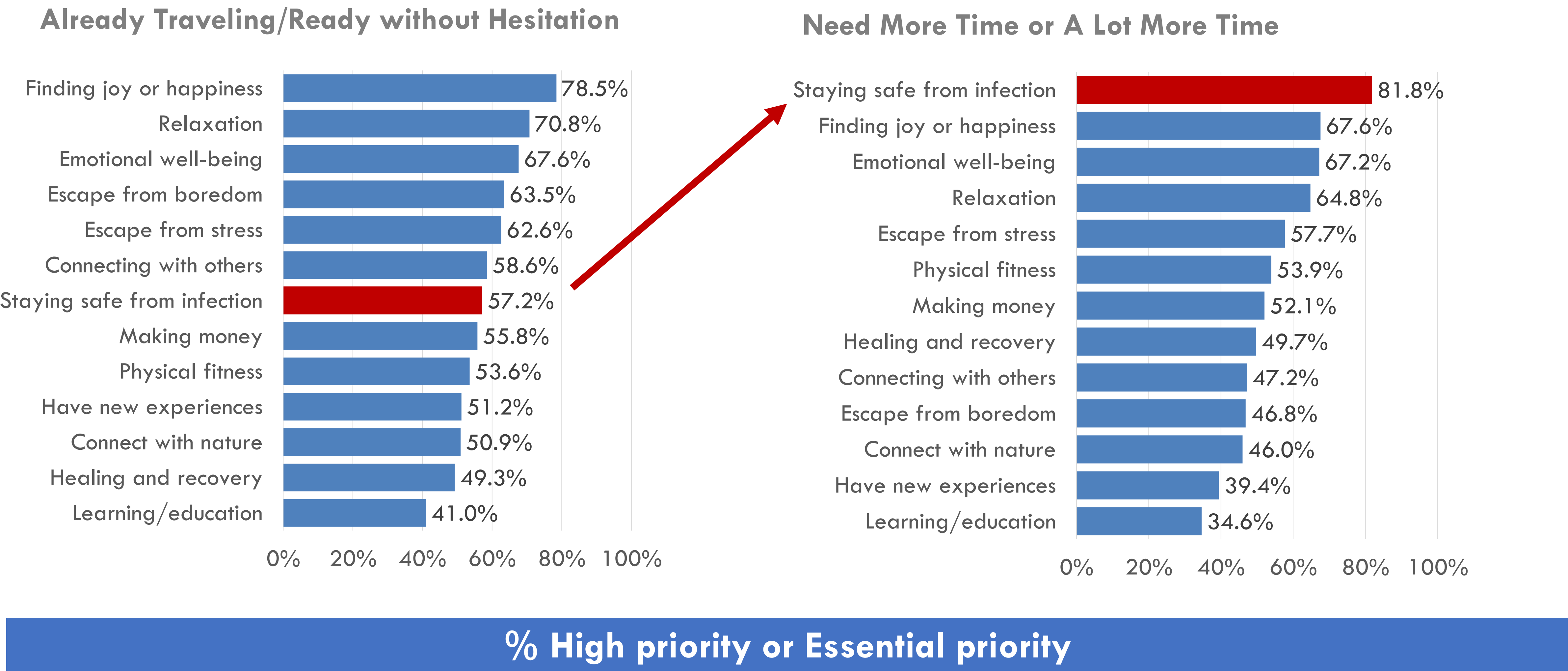| Priority	%
Staying safe from infection	81.8%
Finding joy or happiness	67.6%
Emotional well-being	67.2%
Relaxation	64.8%
Escape from stress	57.7%
Physical fitness	53.9%
Making money	52.1%
Healing and recovery	49.7%
Connecting with others	47.2%
Escape from boredom	46.8%
Connect with nature	46.0%
Have new experiences	39.4%
Learning/education	34.6%

% High priority or Essential priority

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.
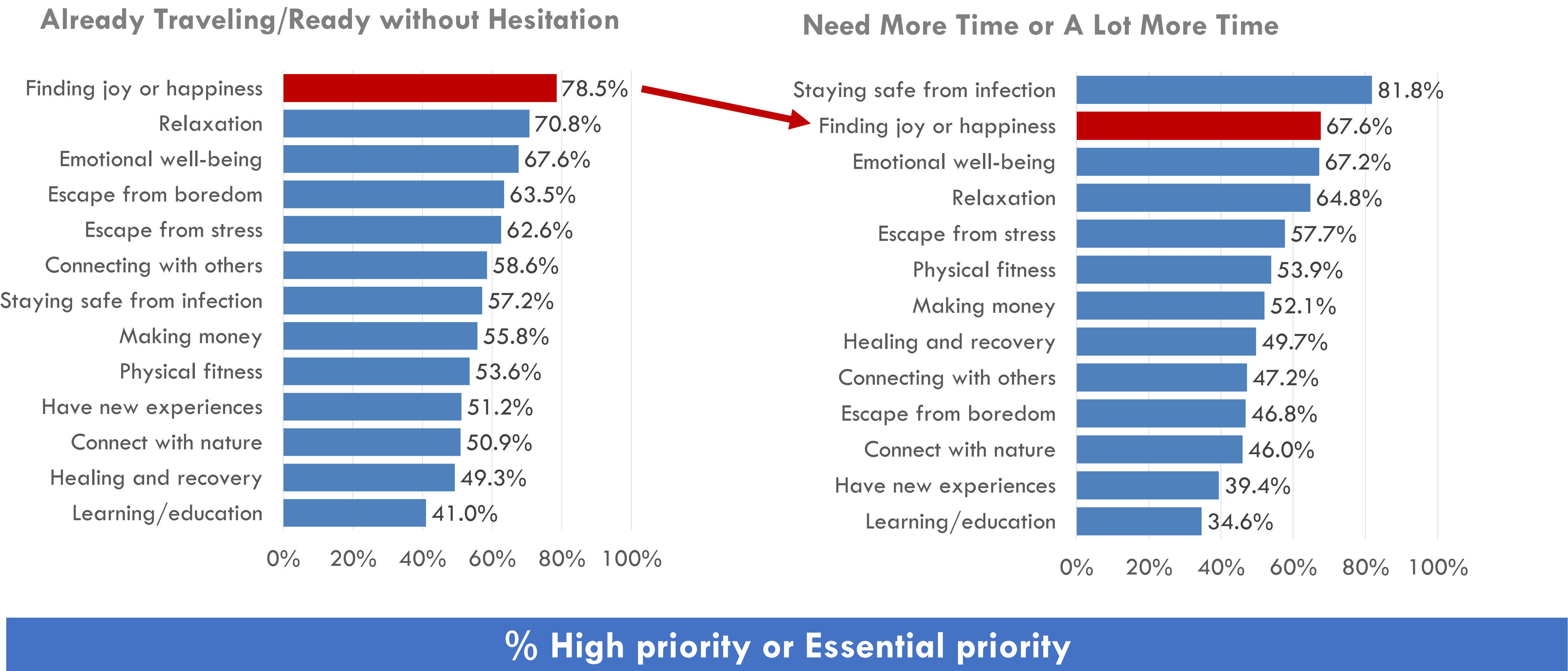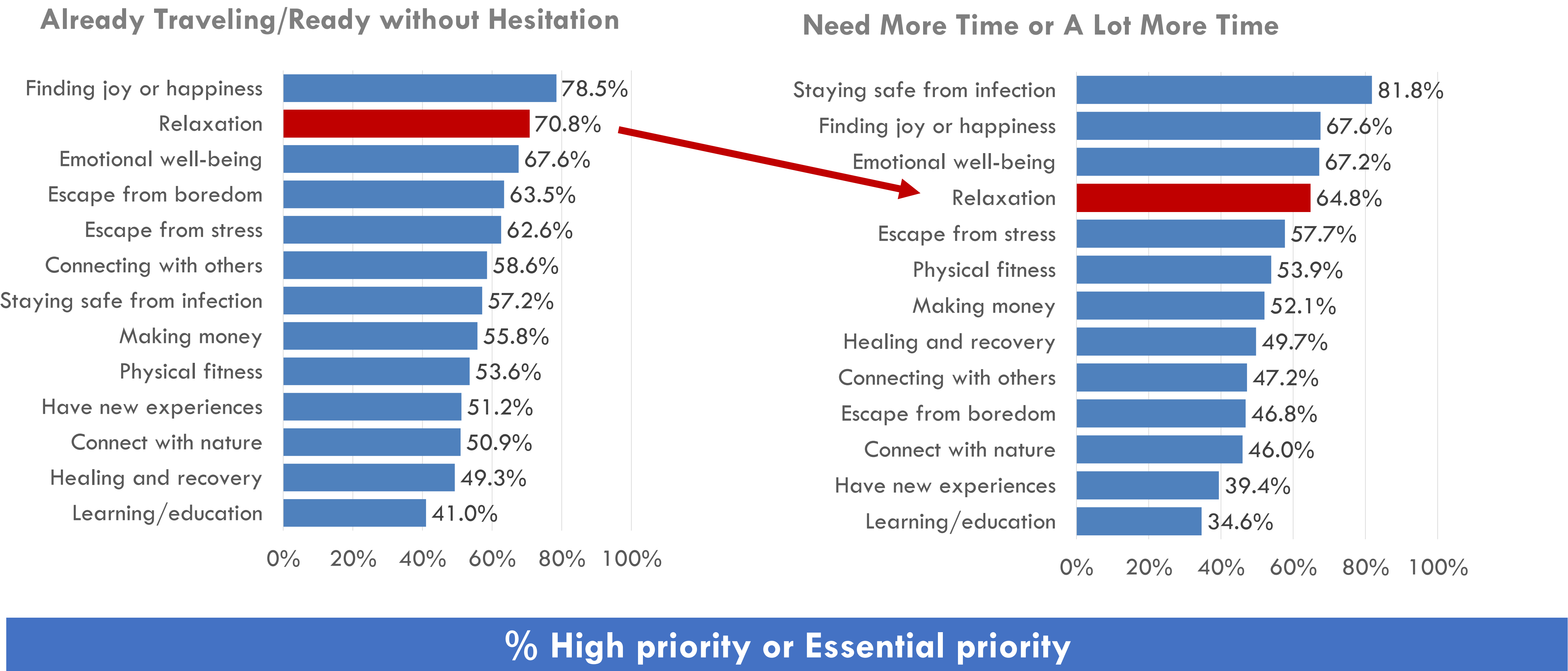
Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY READINESS TO TRAVEL

Already Traveling/Ready without Hesitation

Priority	%
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Have new experiences	51.2%
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Healing and recovery	49.3%
Learning/education	41.0%

Need More Time or A Lot More Time

Priority	%
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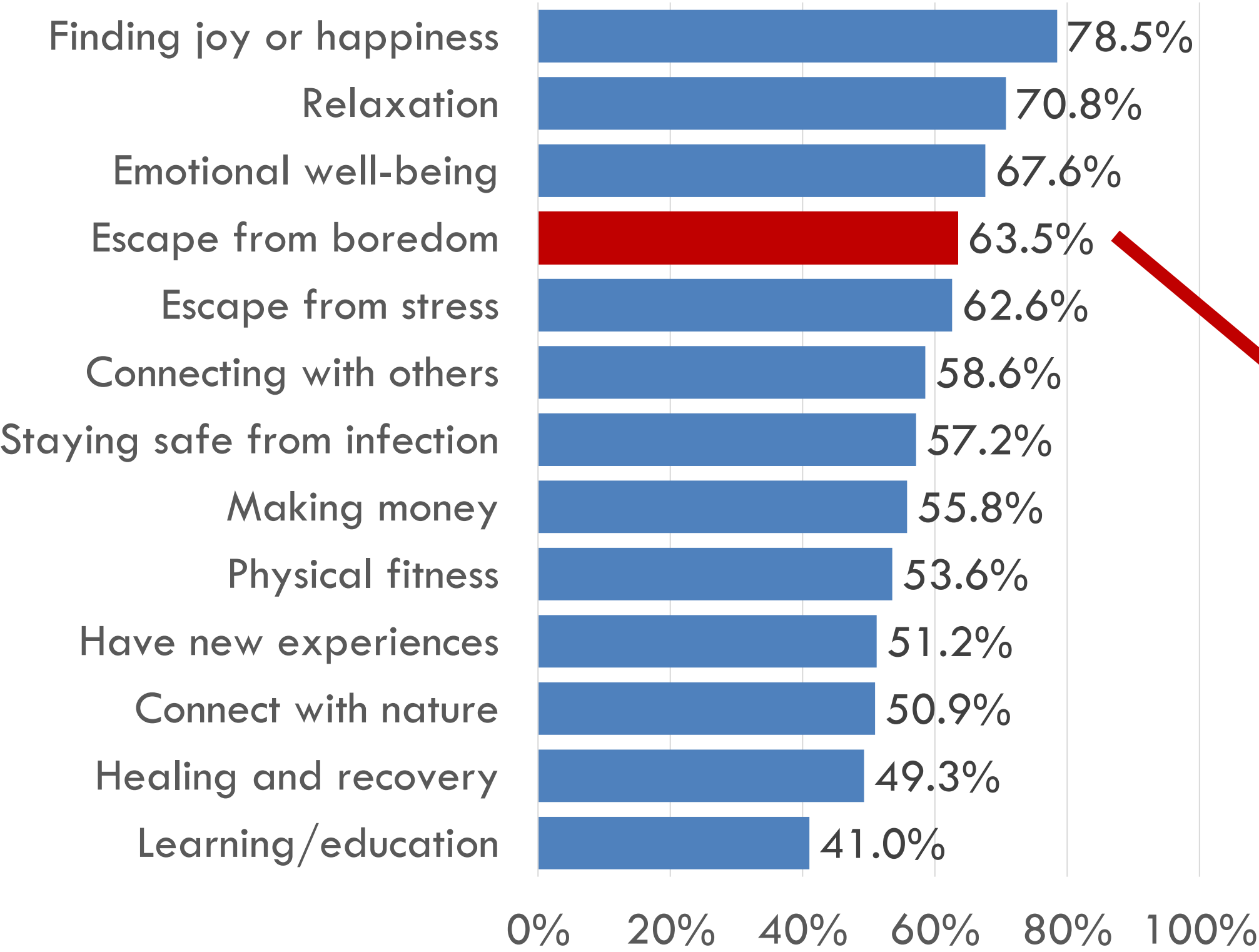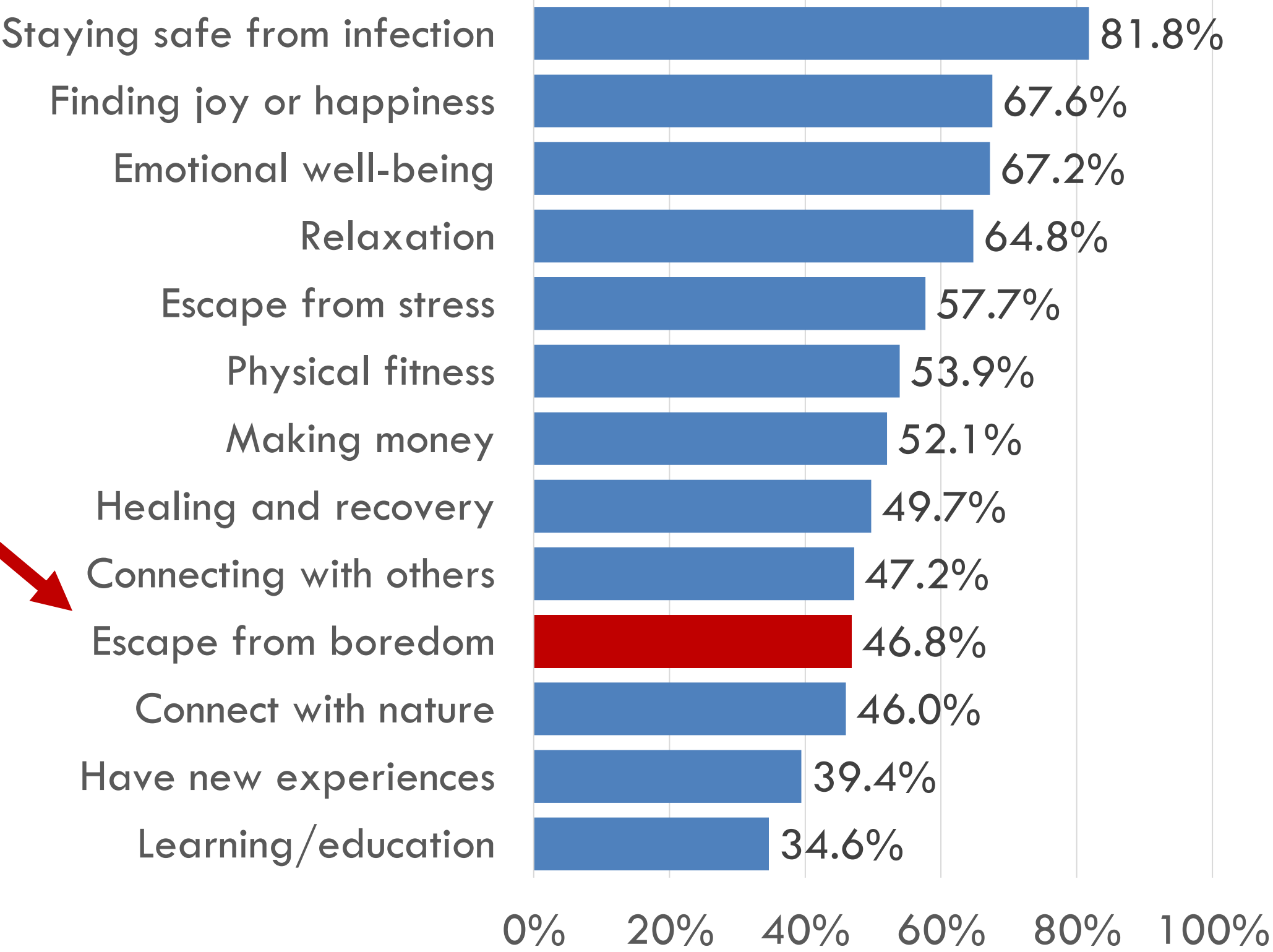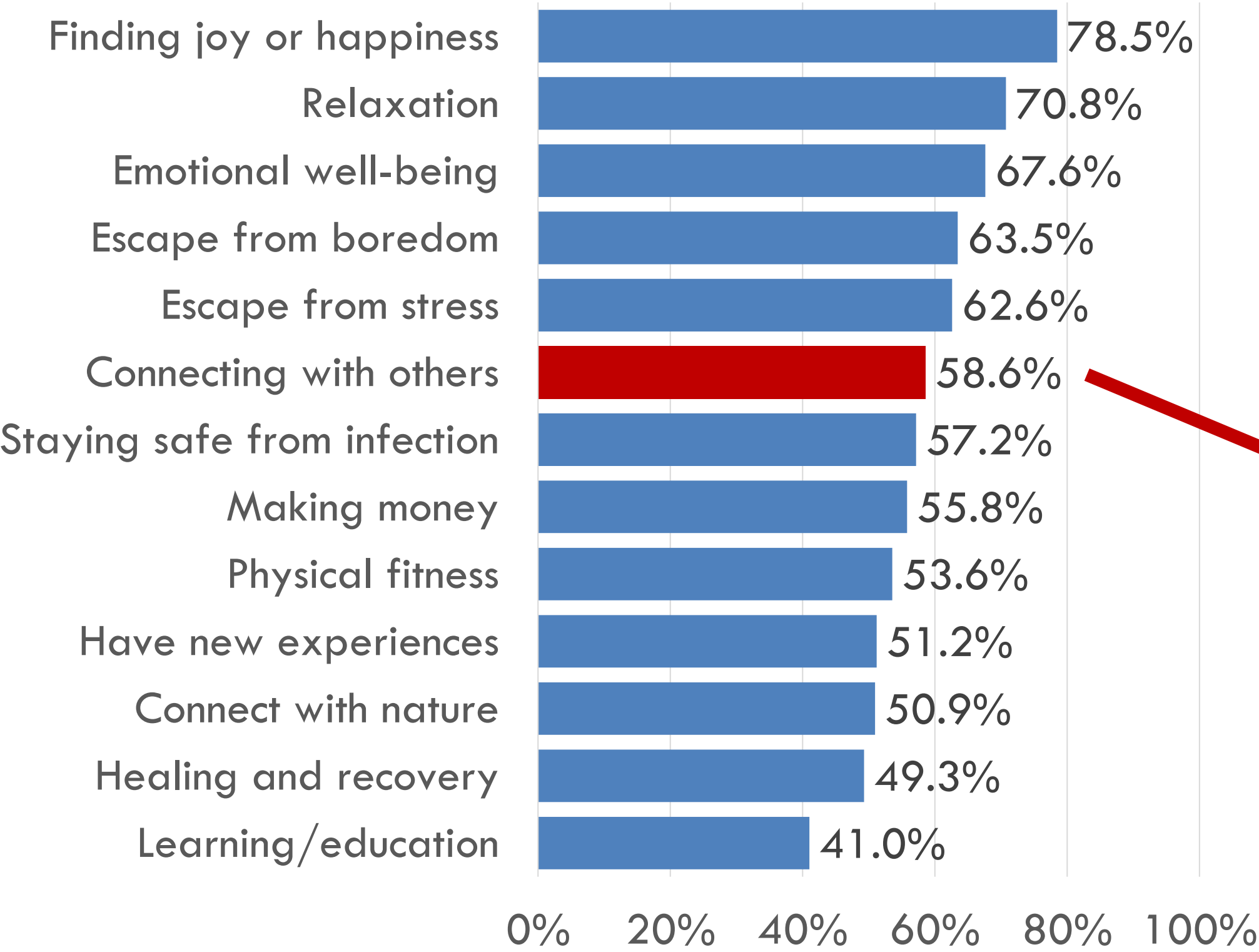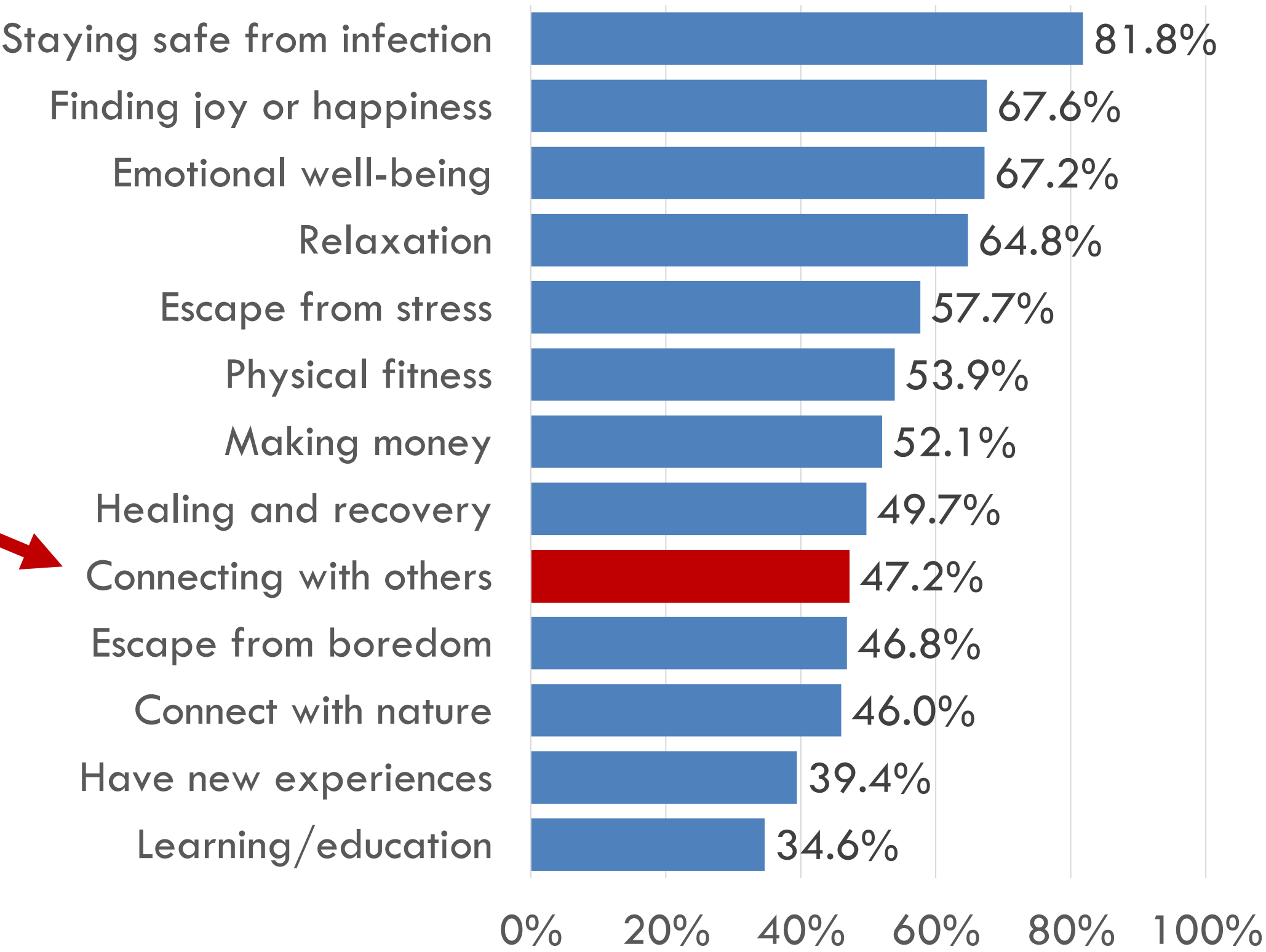
Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY READINESS TO TRAVEL

Already Traveling/Ready without Hesitation

Priority	%
Finding joy or happiness	78.5%
Relaxation	70.8%
Emotional well-being	67.6%
Escape from boredom	63.5%
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Need More Time or A Lot More Time

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% High priority or Essential priority

Destination Analysts
DO YOUR RESEARCH

LIFESTYLE PRIORITIES: BY READINESS TO TRAVEL

Already Traveling/Ready without Hesitation

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Learning/education	34.6%

% High priority or Essential priority

Destination Analysts
DO YOUR RESEARCH

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.

LIFESTYLE PRIORITIES: BY READINESS TO TRAVEL
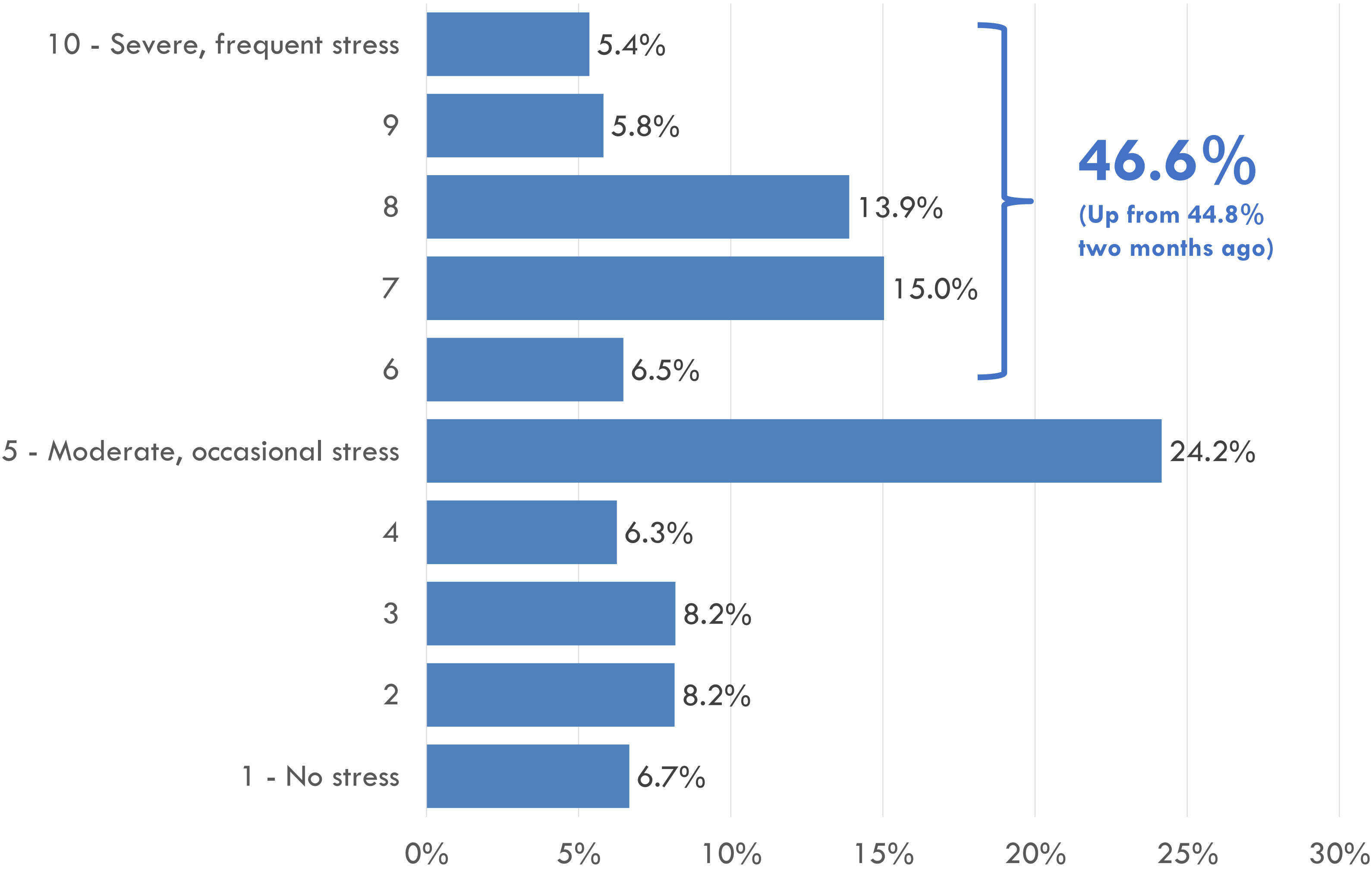
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Healing and recovery	49.3%
Learning/education	41.0%

Need More Time or Need a Lot More Time

Priority	%
Staying safe from infection	81.8%
Finding joy or happiness	67.6%
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% High priority or Essential priority

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.

Destination Analysts
DO YOUR RESEARCH

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Need More Time or A Lot More Time

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% High priority or Essential priority

Destination Analysts
DO YOUR RESEARCH

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.

How Travelers
are Feeling

DAILY STRESS LEVELS

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

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

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

46.6%
(Up from 44.8% two months ago)

Destination Analysts
DO YOUR RESEARCH

DAILY STRESS LEVELS

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

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

10 - Severe, frequent stress — 5.4%
9 — 5.8%
8 — 13.9%

25.1%

7 — 15.0%
6 — 6.5%
5 - Moderate, occasional stress — 24.2%
4 — 6.3%
3 — 8.2%
2 — 8.2%
1 - No stress — 6.7%

Destination Analysts
DO YOUR RESEARCH
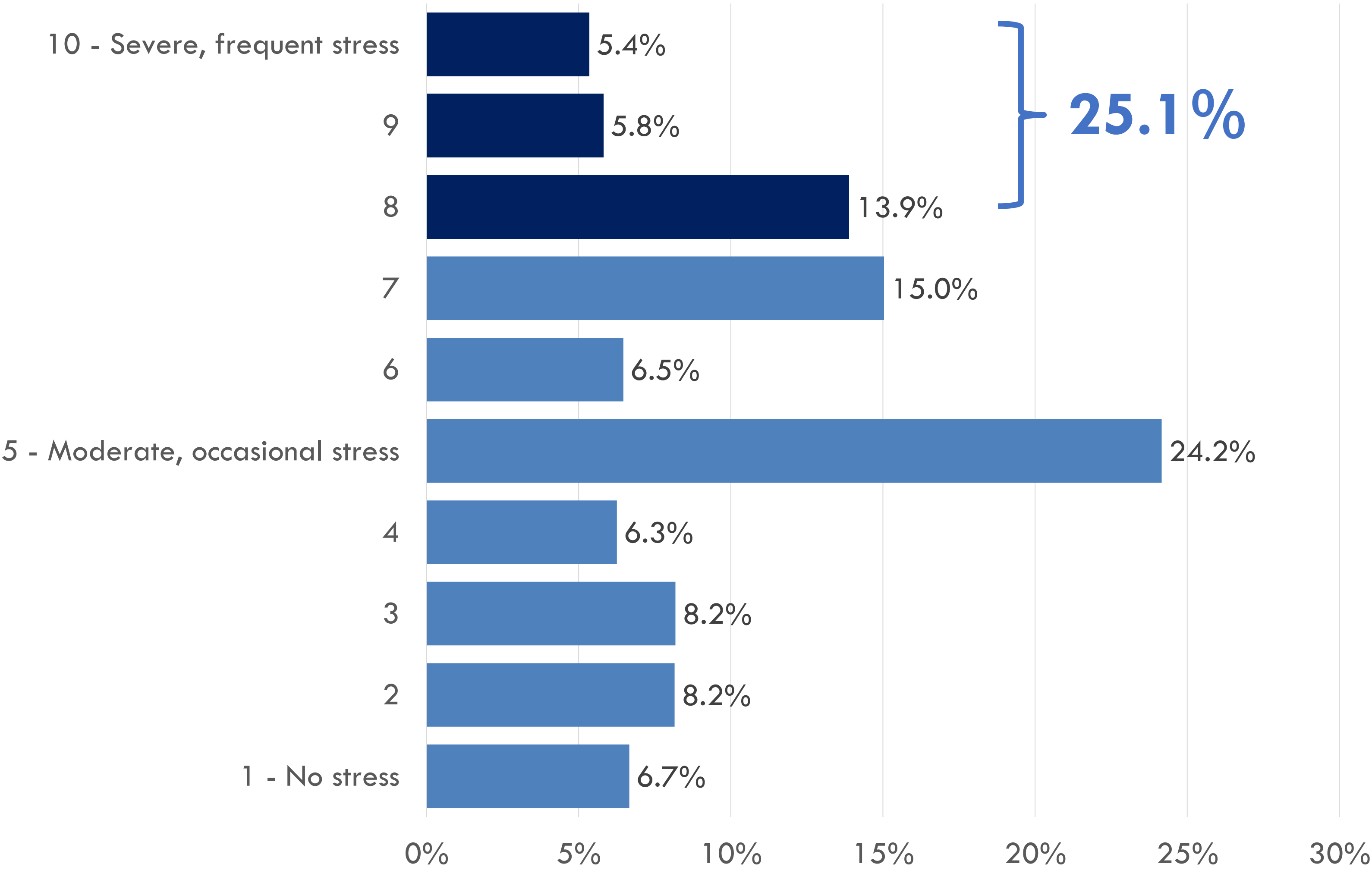
Who Are the Stress Puppies?

DAILY STRESS LEVELS (% 8-10)
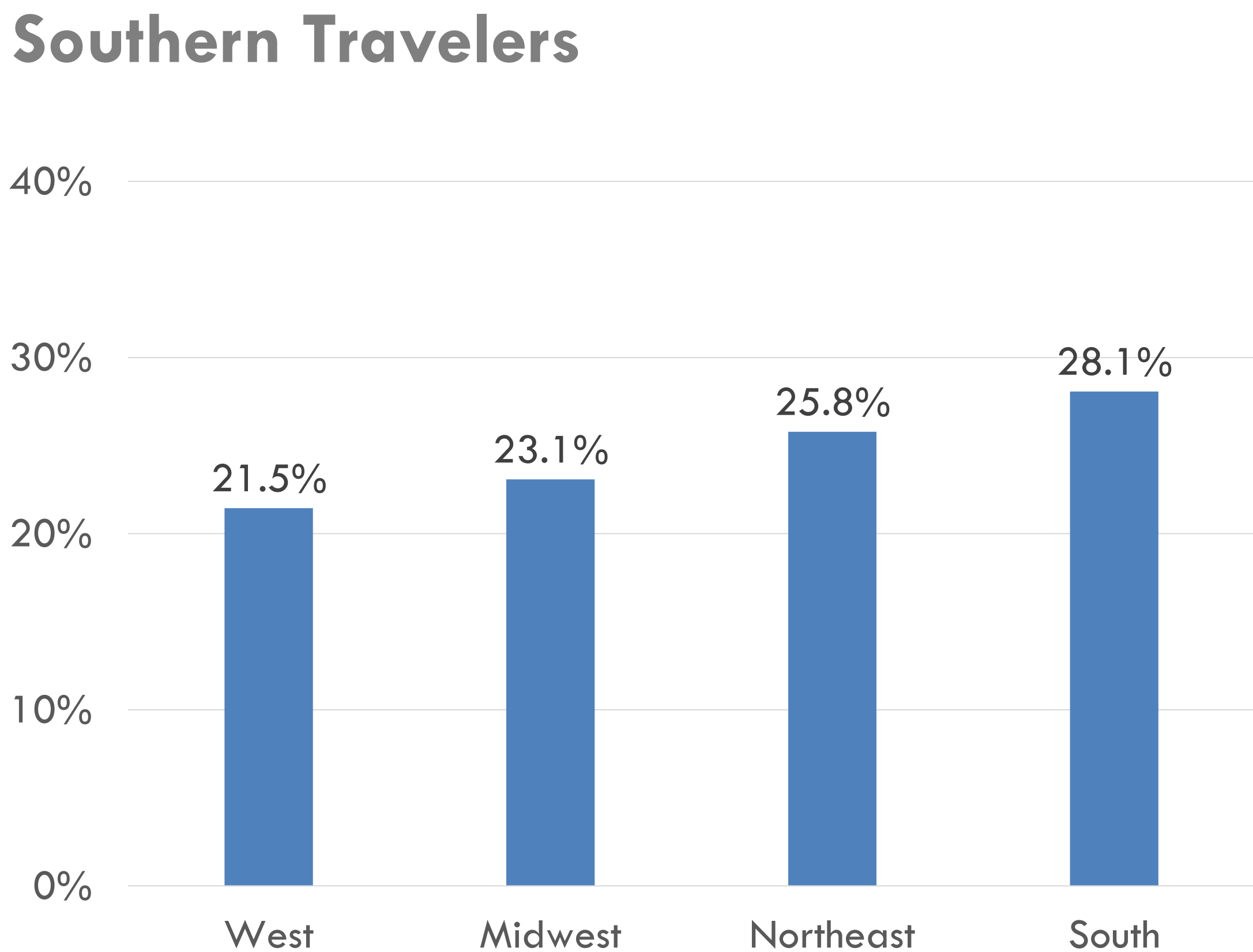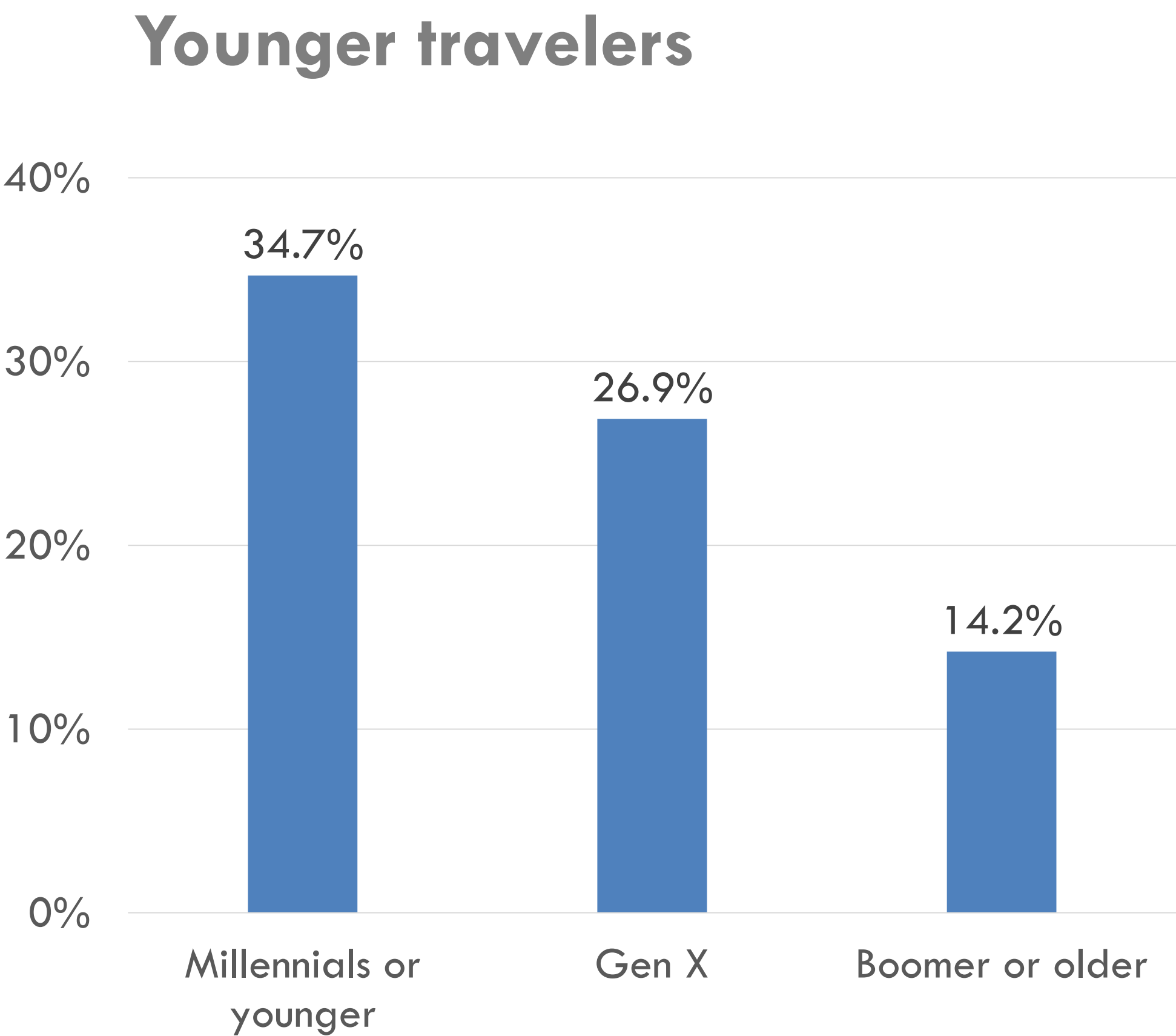
Younger travelers

- Millennials or younger: 34.7%
- Gen X: 26.9%
- Boomer or older: 14.2%

Southern Travelers

- West: 21.5%
- Midwest: 23.1%
- Northeast: 25.8%
- South: 28.1%
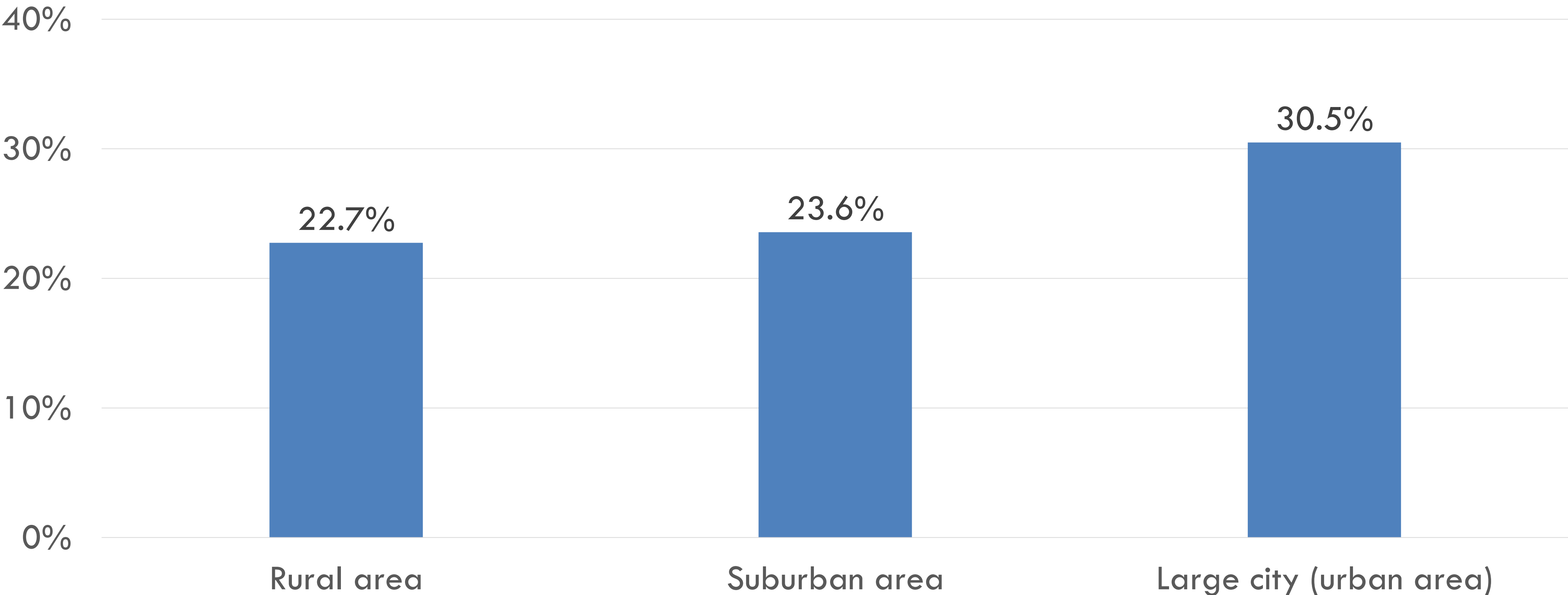
Question: Thinking about the last month, please rate your average level of daily stress from 1 – 10.

DAILY STRESS LEVELS (% 8-10)

Household Income

- $80k and Over: 25.4%
- Under $80k: 24.7%
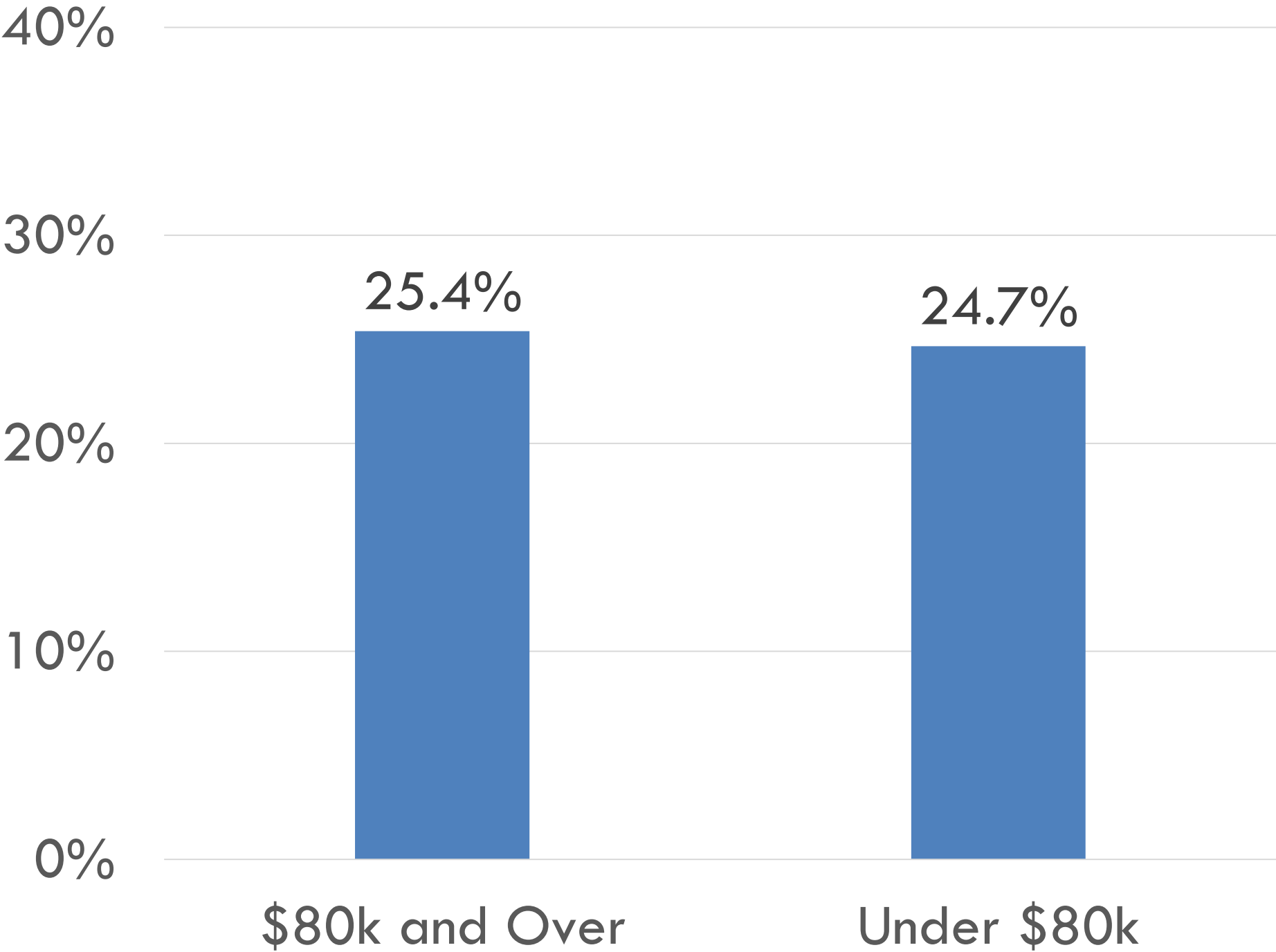
Business & Meetings travelers

- Business Trips: 1 or more: 32.6%
- Business Trips: Zero: 21.2%
- Convention / Meetings: 1 or more: 36.4%
- Convention / Meetings: Zero: 21.0%

Destination Analysts
DO YOUR RESEARCH

Question: Thinking about the last month, please rate your average level of daily stress from 1 - 10.
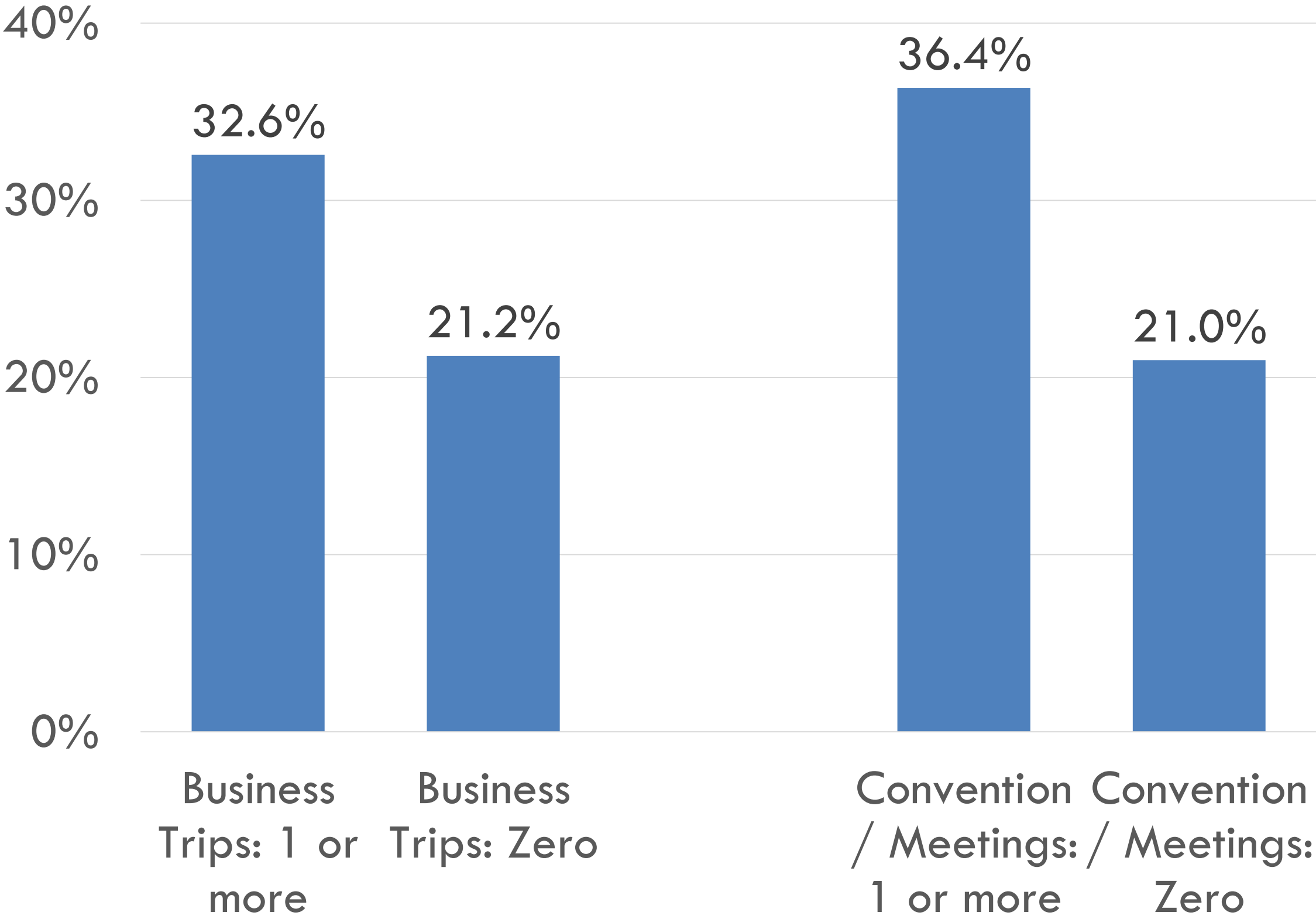
DAILY STRESS LEVELS (% 8-10)

Cruise Travelers
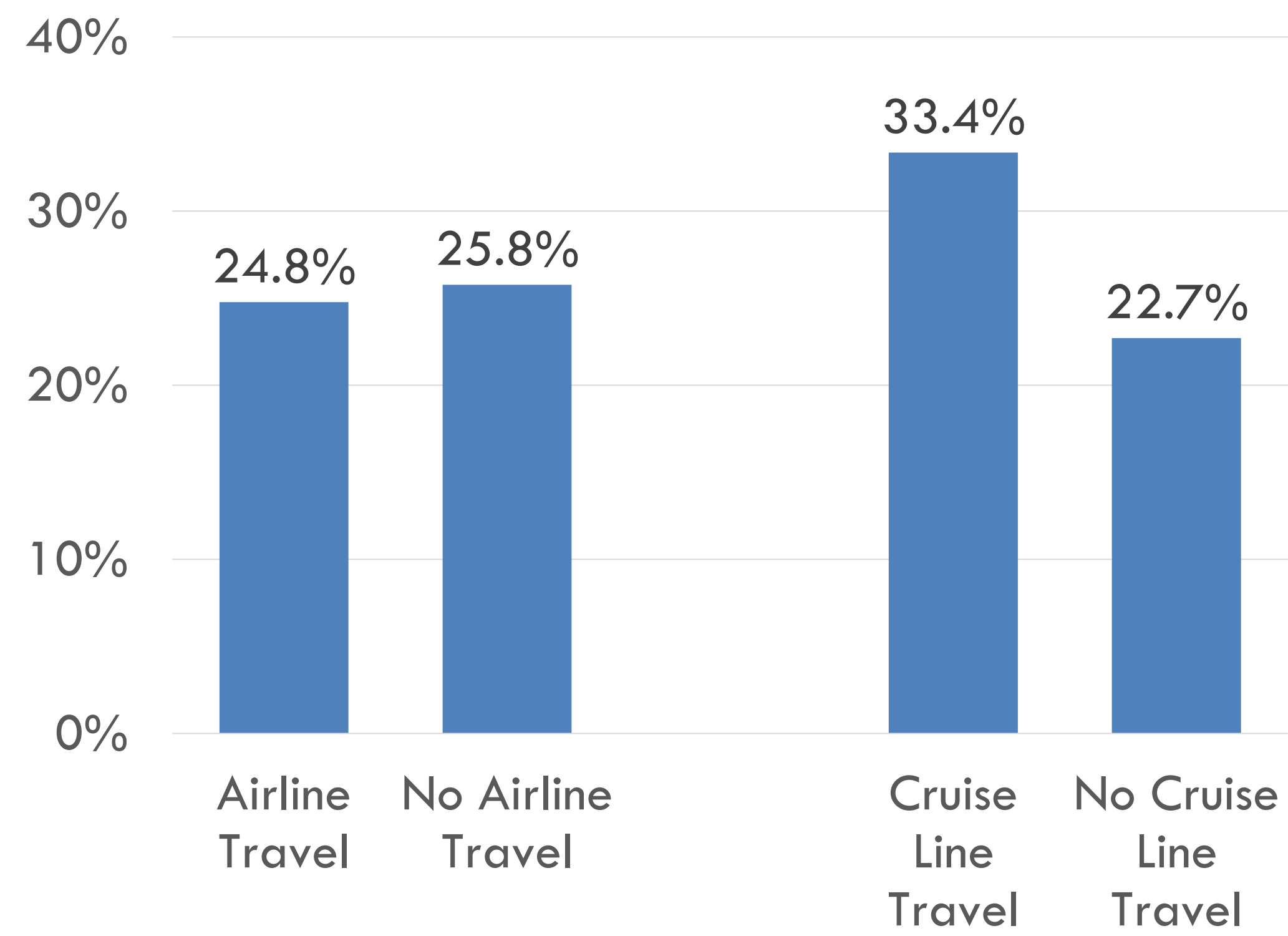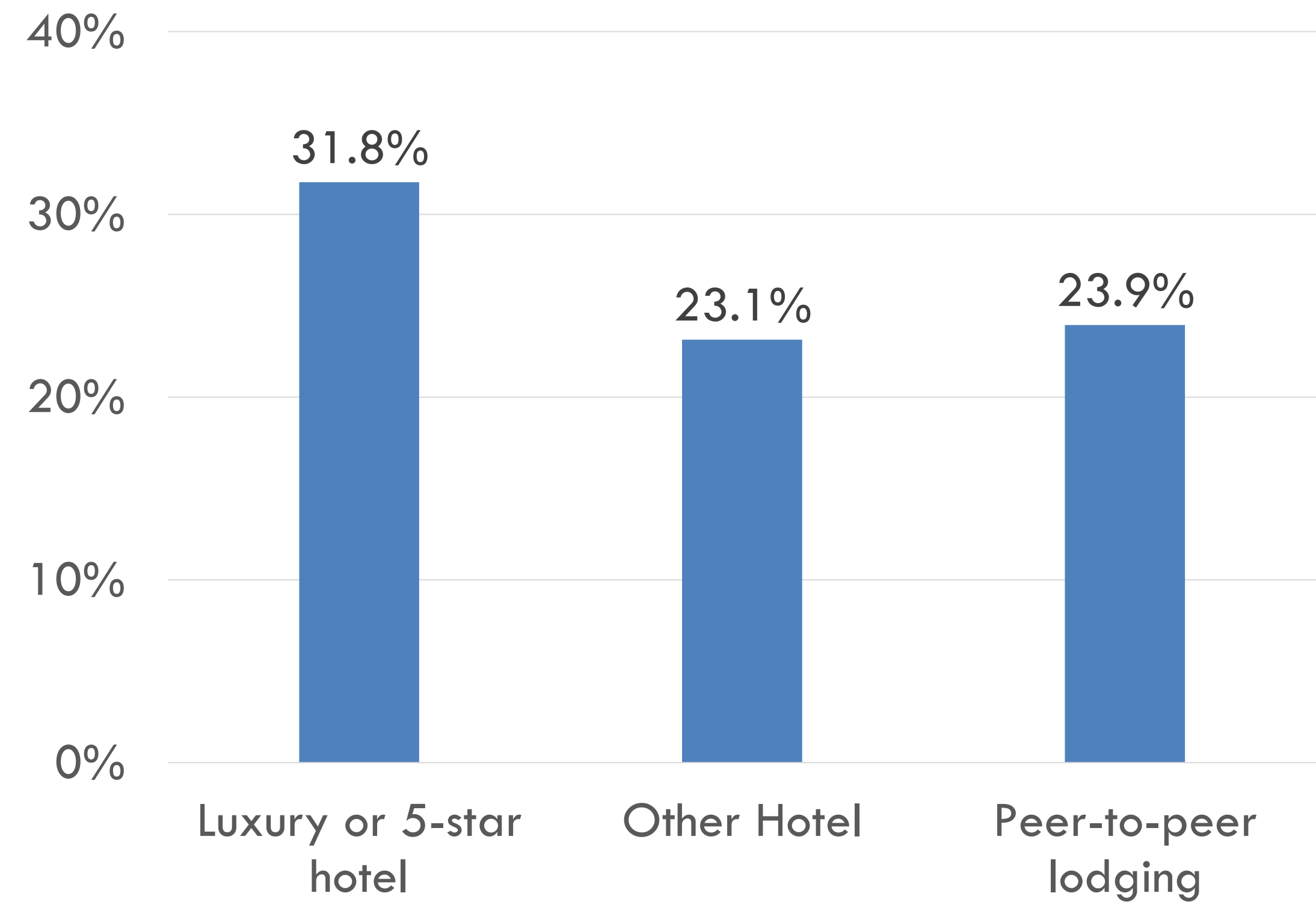
- Airline Travel: 24.8%
- No Airline Travel: 25.8%
- Cruise Line Travel: 33.4%
- No Cruise Line Travel: 22.7%

Luxury Hotel Guests

- Luxury or 5-star hotel: 31.8%
- Other Hotel: 23.1%
- Peer-to-peer lodging: 23.9%

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

Destination Analysts
DO YOUR RESEARCH

DAILY STRESS LEVELS (% 8-10)

Women

Female	28.1%
Male	21.4%
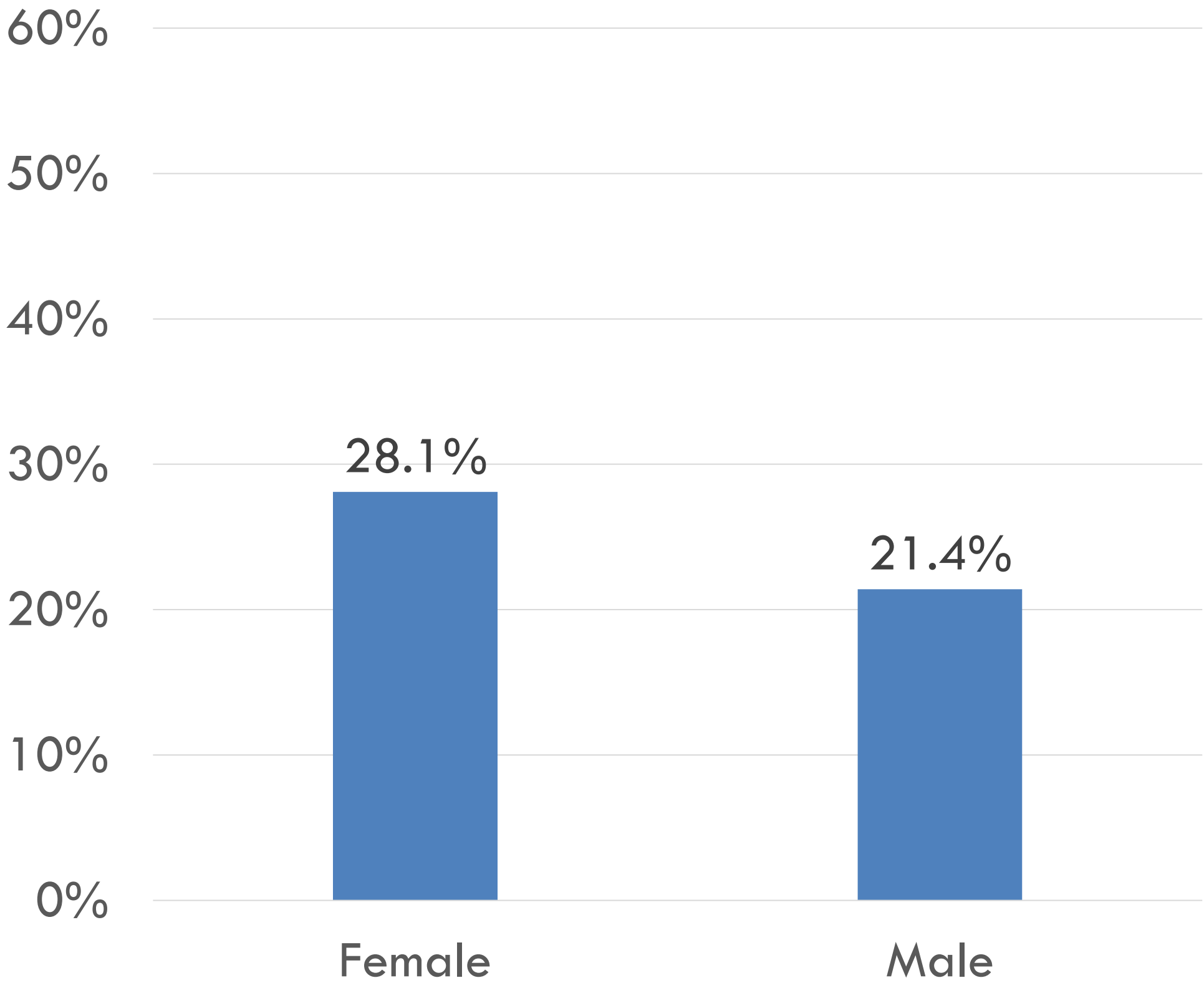
Disabled Travelers & their Companions

Travels with Disabled Persons	50.1%
Doesn't Travel with Disabled Persons	21.3%

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

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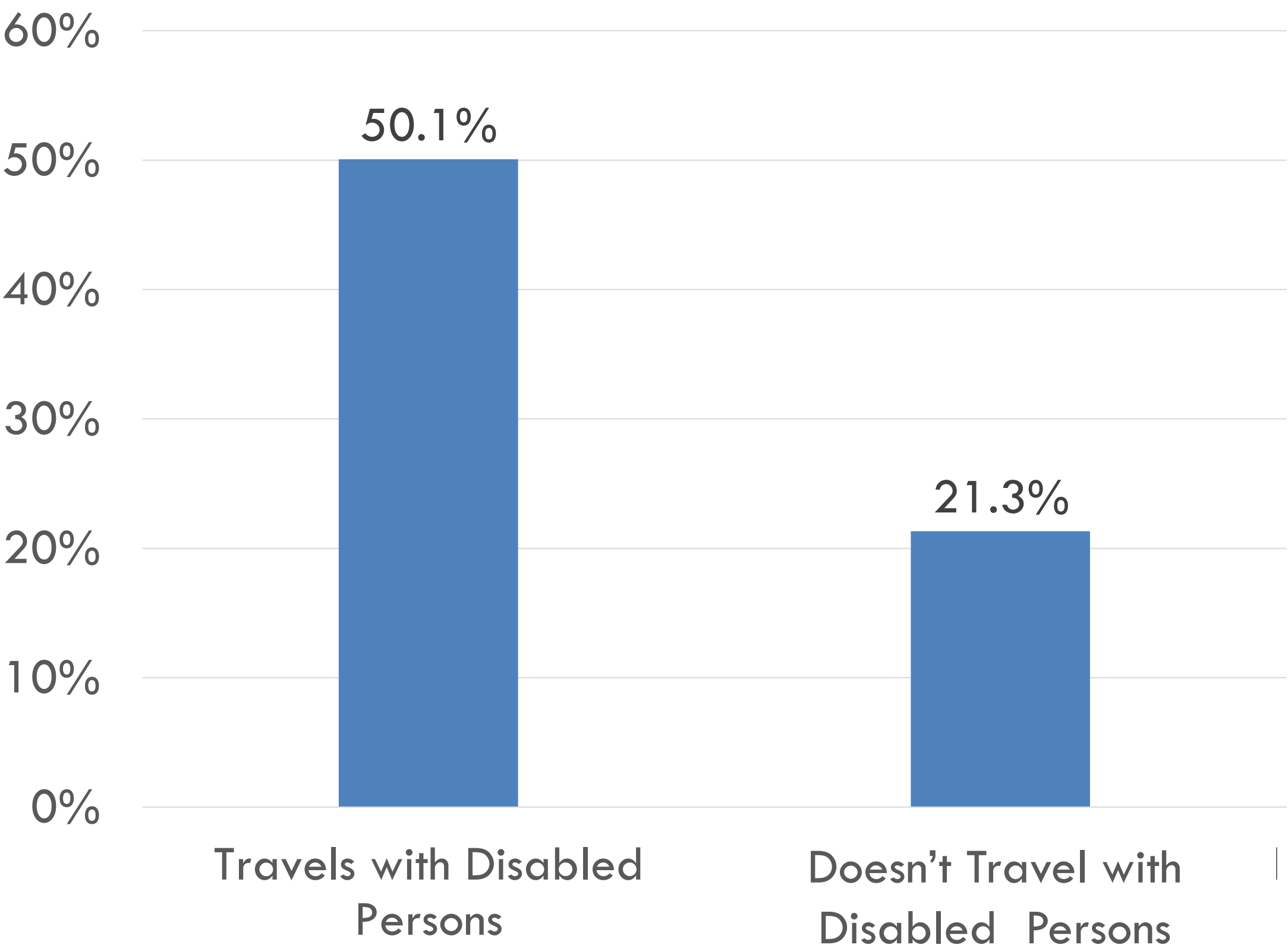
SLEEP PATTERNS DISRUPTED

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

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

Yes - frequently — 14.0%

Yes - sometimes — 29.8%

Yes - but very little — 21.6%

No - not at all — 34.7%

43.8%
(Up from 41.8% two months ago)

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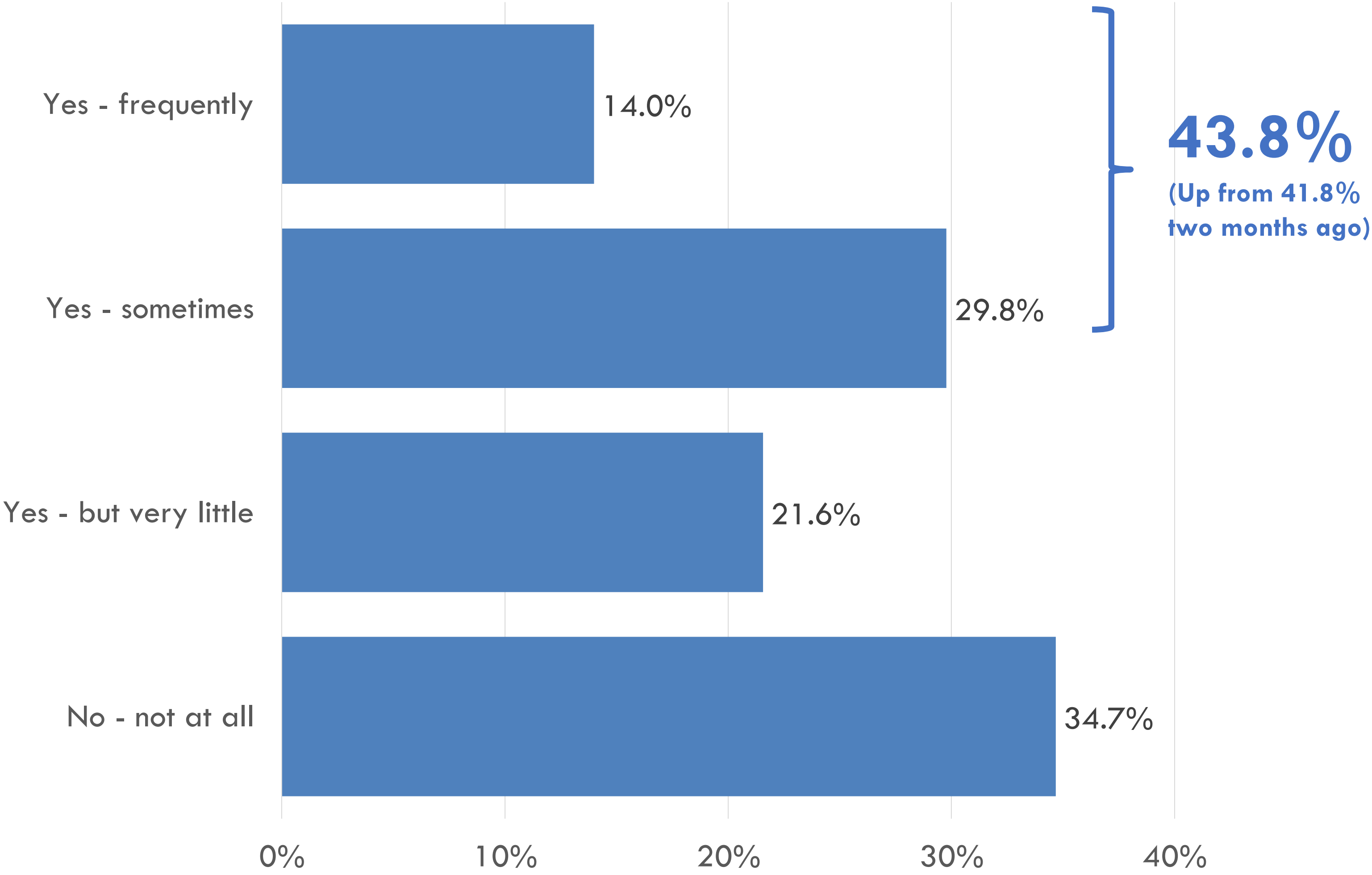
SLEEP PATTERNS DISRUPTED (FREQUENTLY OR SOMETIMES)

Chart 1 (top left):
- Millennials or younger: 57.0%
- Gen X: 47.5%
- Boomer or older: 28.1%

Chart 2 (top right):
- Cruise Line Travelers: 52.4%
- No Cruise Line Travel: 41.3%

Chart 3 (bottom left):
- Rural area: 36.3%
- Suburban area: 42.6%
- Large city (urban area): 52.6%

Chart 4 (bottom right):
- Travels with Disabled Persons: 64.3%
- Doesn't Travel with Disabled Persons: 40.5%

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DO YOUR RESEARCH

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

FEELINGS IN THE PAST MONTH

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

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

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

% "Most of the time" or "Often"

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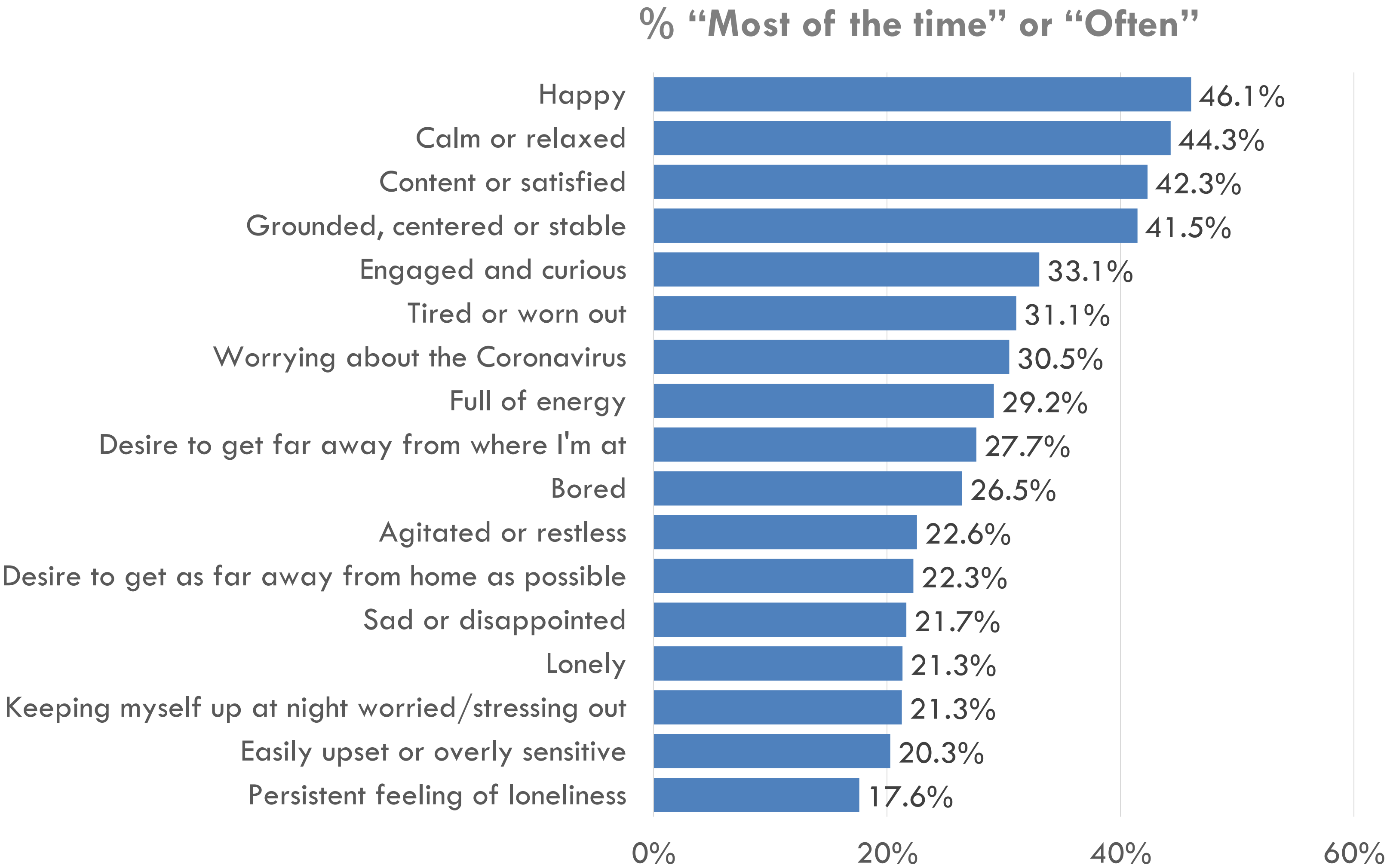
FEELINGS IN THE PAST MONTH: WHAT'S CHANGING?

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

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

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

Absolute Change in Past 2 Months

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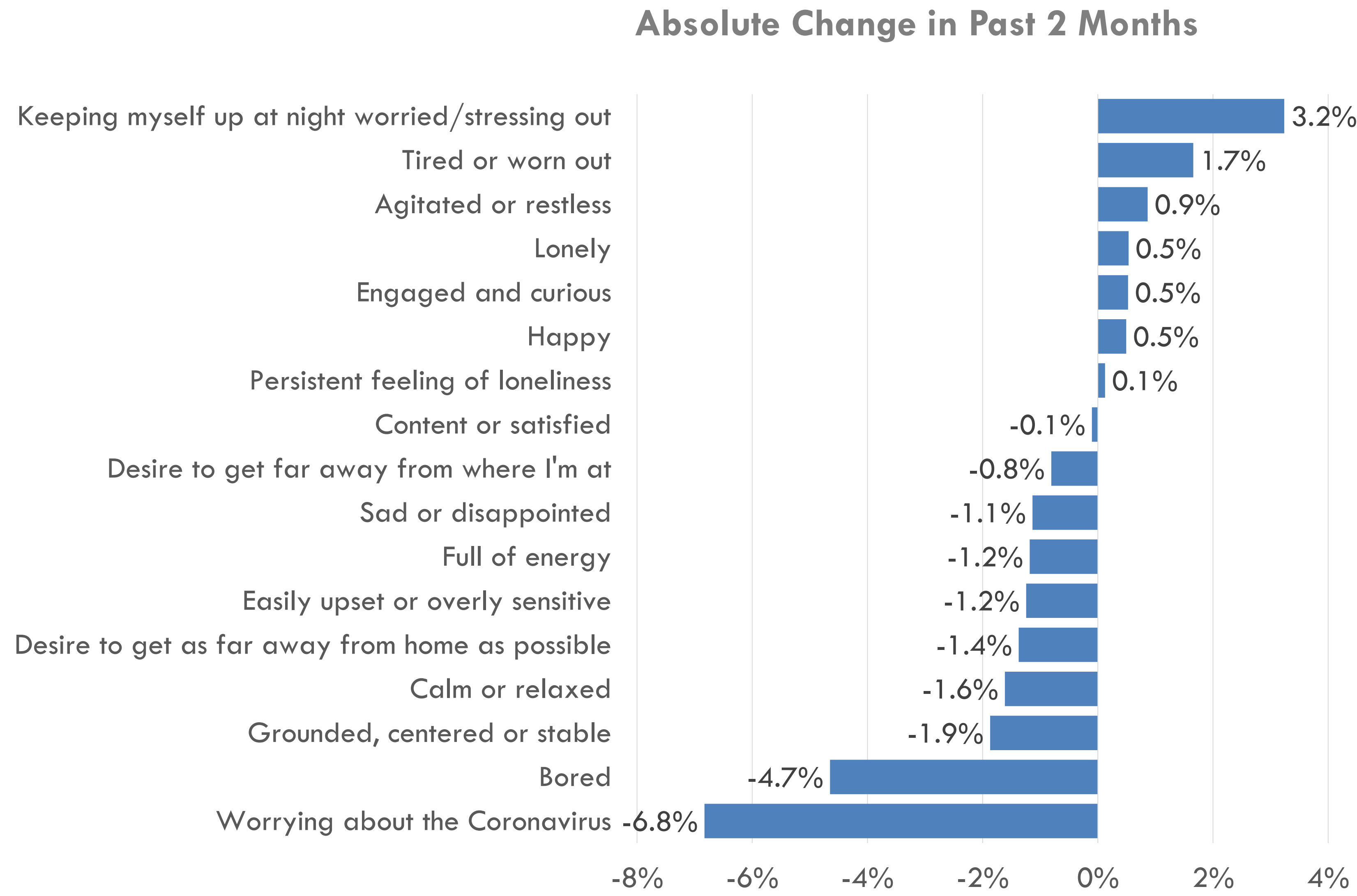
KEY TAKEAWAYS

- American travelers who are highly stressed and who have recently experienced disruptions in their sleep patterns tend to be younger, urban dwellers. They're more likely to be cruise travelers and more likely to have—or travel with those who have—physical or mental needs.

- Feelings during the last month skew towards positive emotions, such as feeling happy, relaxed and content. However, compared to two months ago, more travelers stay up at night stressing and feel worn out.

- Nevertheless, fewer people now say that they have felt worried about the coronavirus in the past month.

Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 21st

What is a Predictive Index?

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

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

The goals are to identify:

- WHO are the traveler segments that appear receptive to travel marketing and

- WHEN will they be ready to travel

Predictive Index Formula

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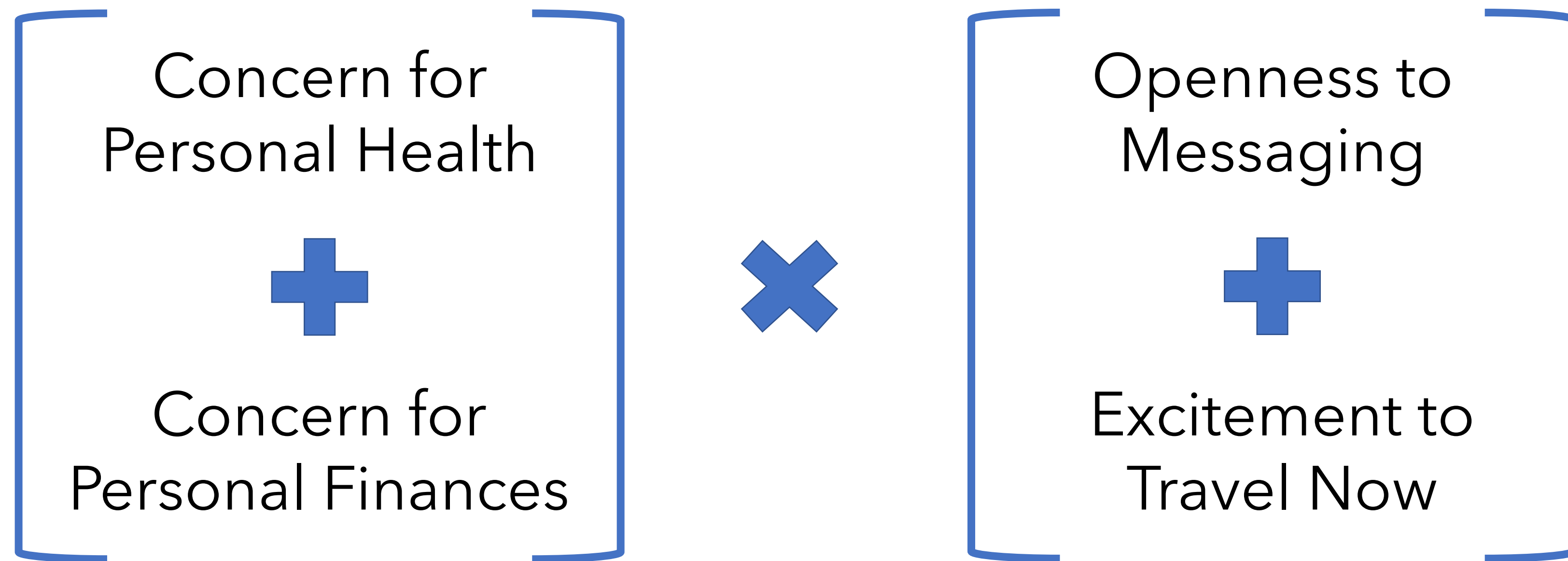
*Normalized to a 100pt scale

Healthy Travel Outlook

Chart showing "High Travel" percentages across score ranges, divided into three zones: "Not Ready to Travel" (red), "Potentially Marketable" (yellow, with "Neutral" label), and "Ready to Travel" (green).

- 0: ~3%
- 1 - 25: ~10%
- 26 - 50: ~27%
- 51 - 75: ~35%
- 76 - 100: ~25%

Legend: ■ High Travel

Travel Outlook

Neutral

Not Ready to Travel

Potentially Marketable

Ready to Travel

- 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

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

Ready to Travel

Potentially Marketable

Not Ready to Travel

100.0
75.0
50.0
25.0
0.0

Legend:
- Total
- Millennials or younger
- Gen X
- Boomer or older
- WEST
- MIDWEST
- NORTHEAST
- SOUTH
- International Travelers
- Air Travelers
- Cruise Travelers
- Leisure Travelers
- VFR Travelers
- Business Travelers
- Convention Travelers
- Female
- Male
- Affluent - Over $125K
- $80K - $125K
- Under $80K
- City Travelers
- Beach Travelers
- US National Parks Travelers
- Mountain Travelers
- Dessert Travelers
- Suburban area
- Large city (urban area)
- Rural area
- Luxury Hotel
- Non-Luxury Hotel
- Peer-to-peer lodging
- Campground or RV park

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

Residence Type

Legend: Suburban area · Large city (urban area) · Rural area

Percent Potentially Marketable
(Index Above 25)

Legend: Suburban area — Large city (urban area) — Rural area

Lodging Preference

Percent Potentially Marketable
(Index Above 25)

Gender

Percent Potentially Marketable
(Index Above 25)

Generation
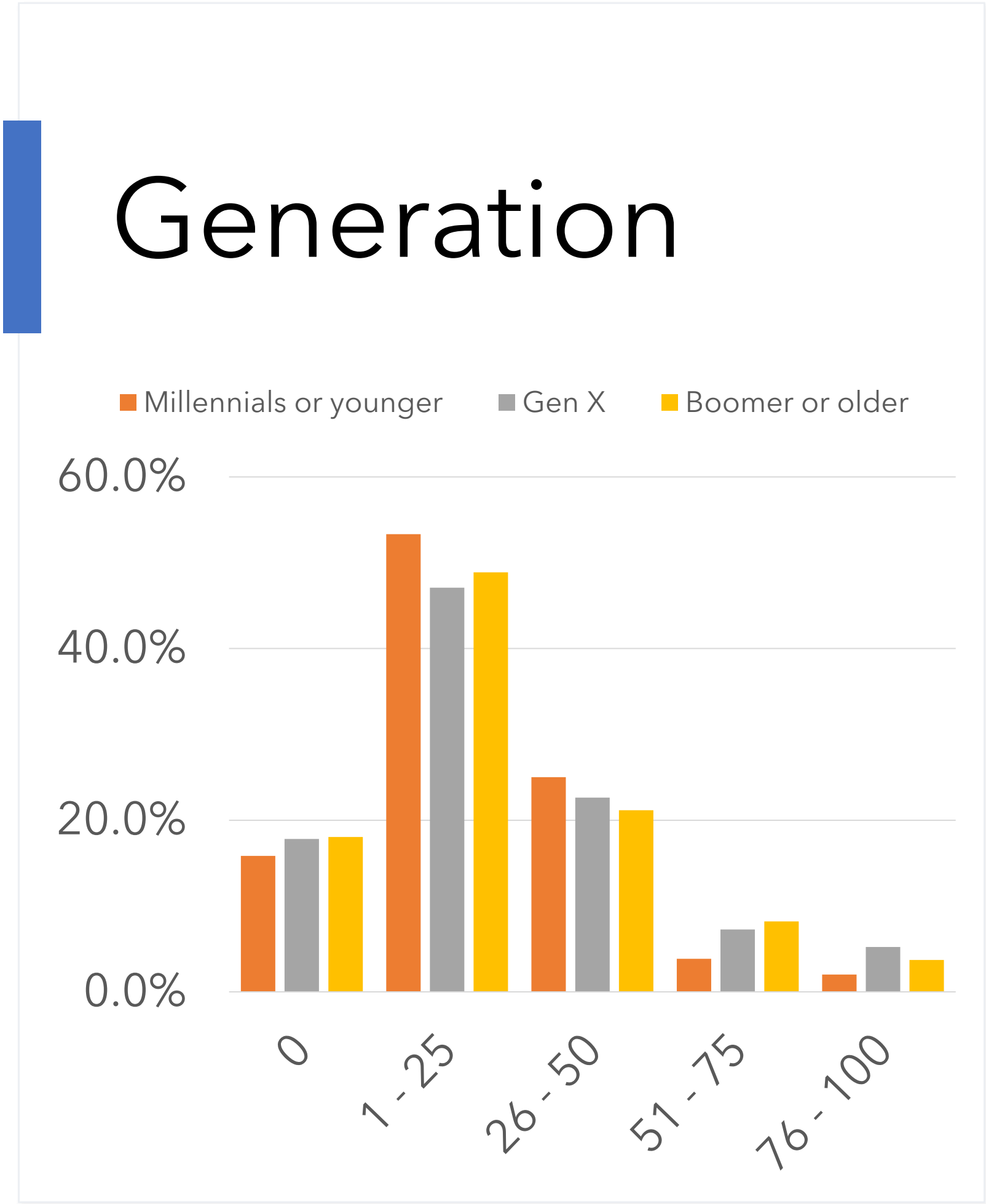
Percent Potentially Marketable
(Index Above 25)
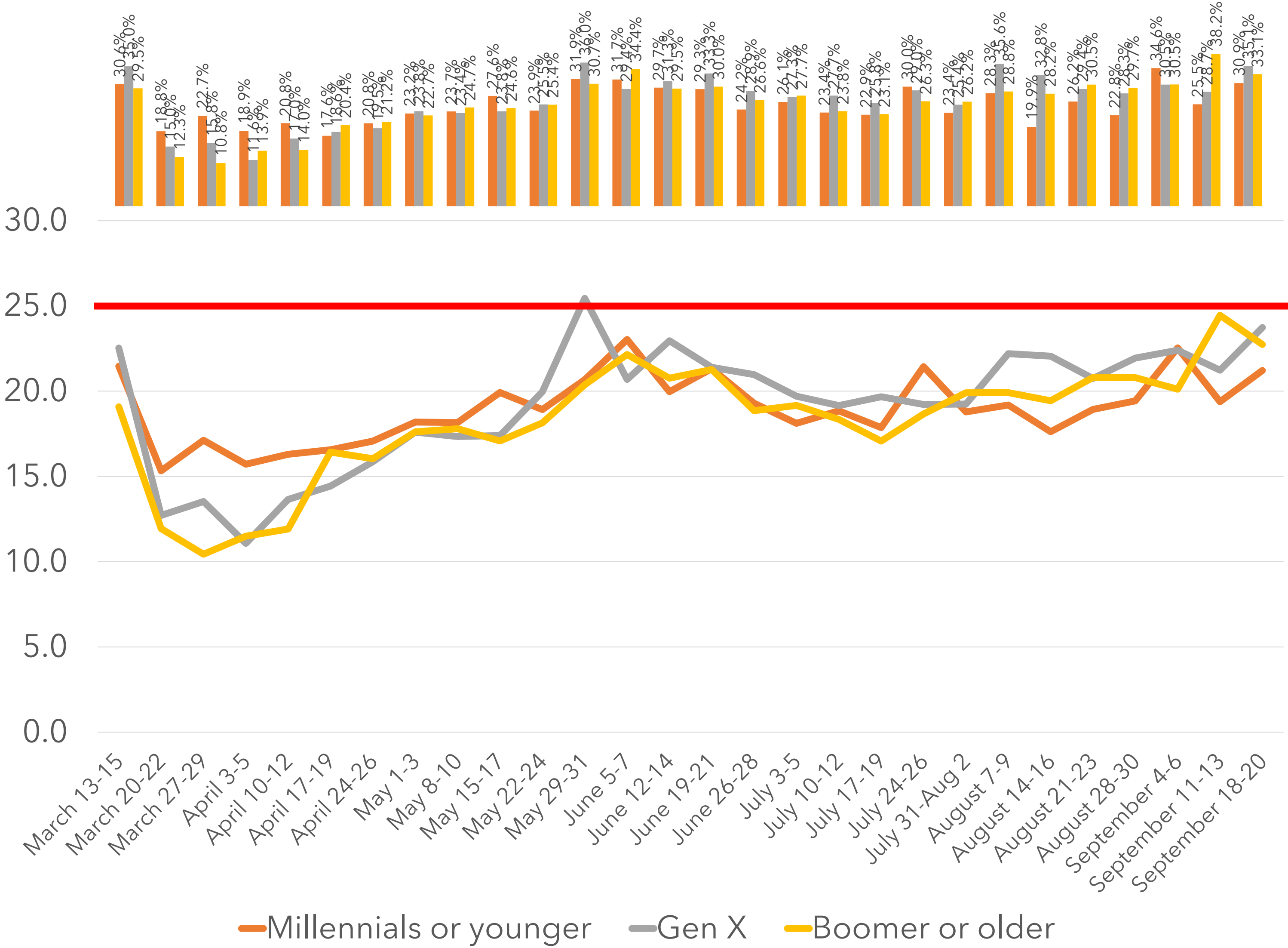
US Regions
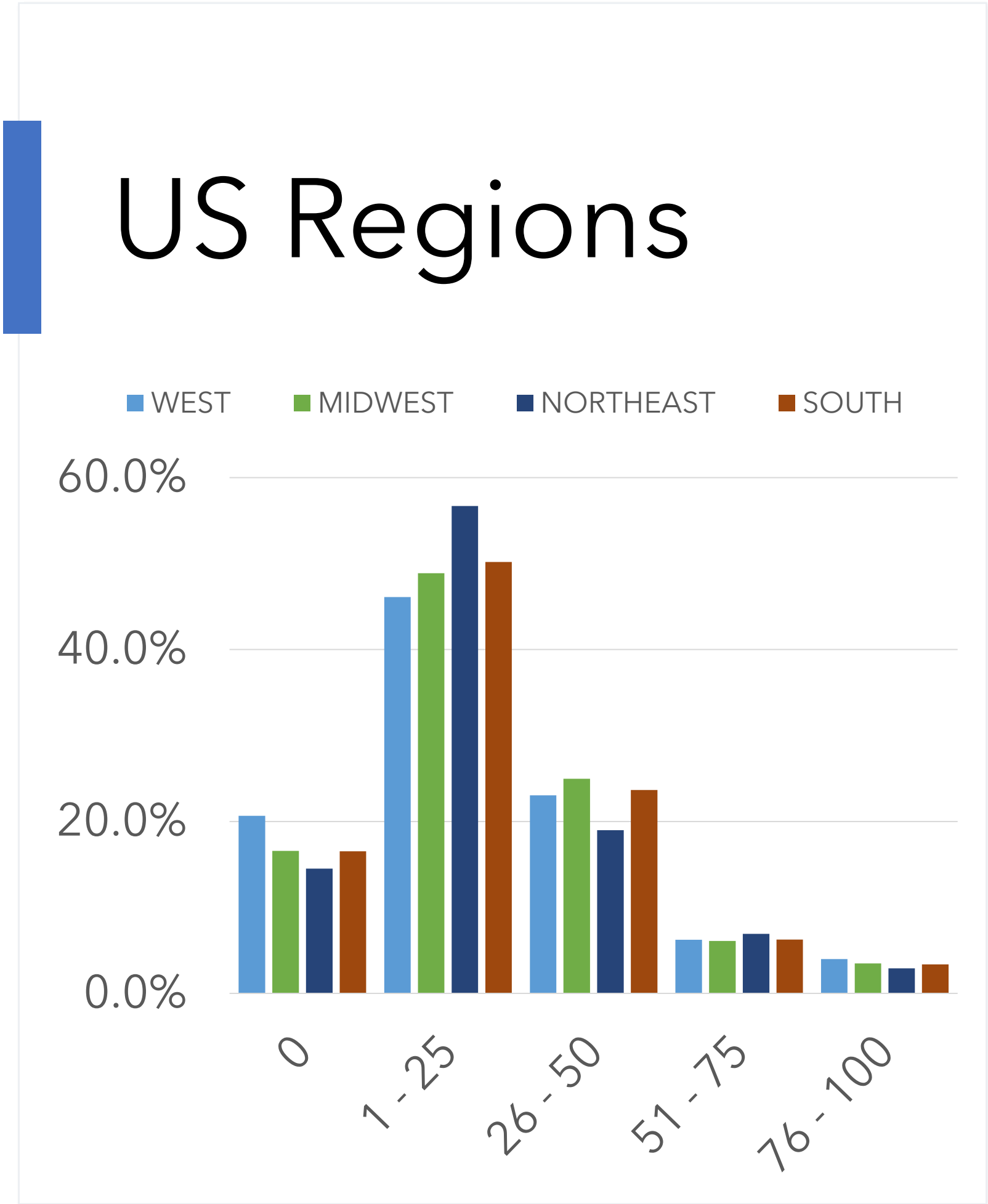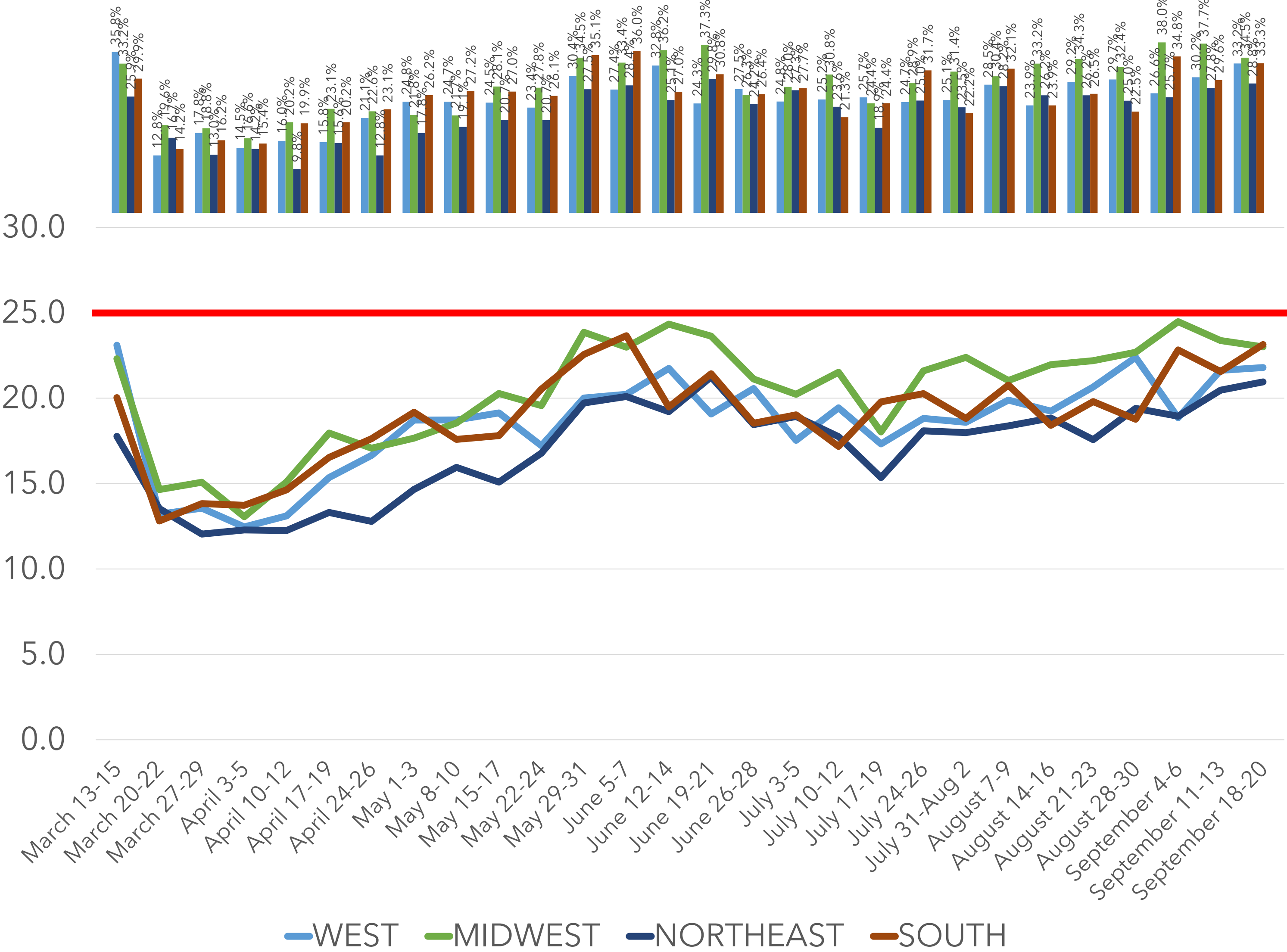
Next/Ongoing Updates

- 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

MARKET RESEARCH

Destination Analysts

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

Send suggestions or requests for questions to:

Info@DestinationAnalysts.com & Myha@DestinationAnalysts.com

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15-minute presentations for your board and stakeholders

info@destinationanalysts.com

MEETINGS RESEARCH CO-OP

Want to Participate? Go to:

DestinationAnalysts.com/meetings-coop

Research & Data Support for Grant Applications & Recovery Programs

info@destinationanalysts.com

Presentation deck and webinar recording available on our website:

DestinationAnalysts.com/covid-webinars

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