# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

*Presentation of Findings*
*September 28th, 2020*

Destination Analysts

Webinar recording
available on our website:
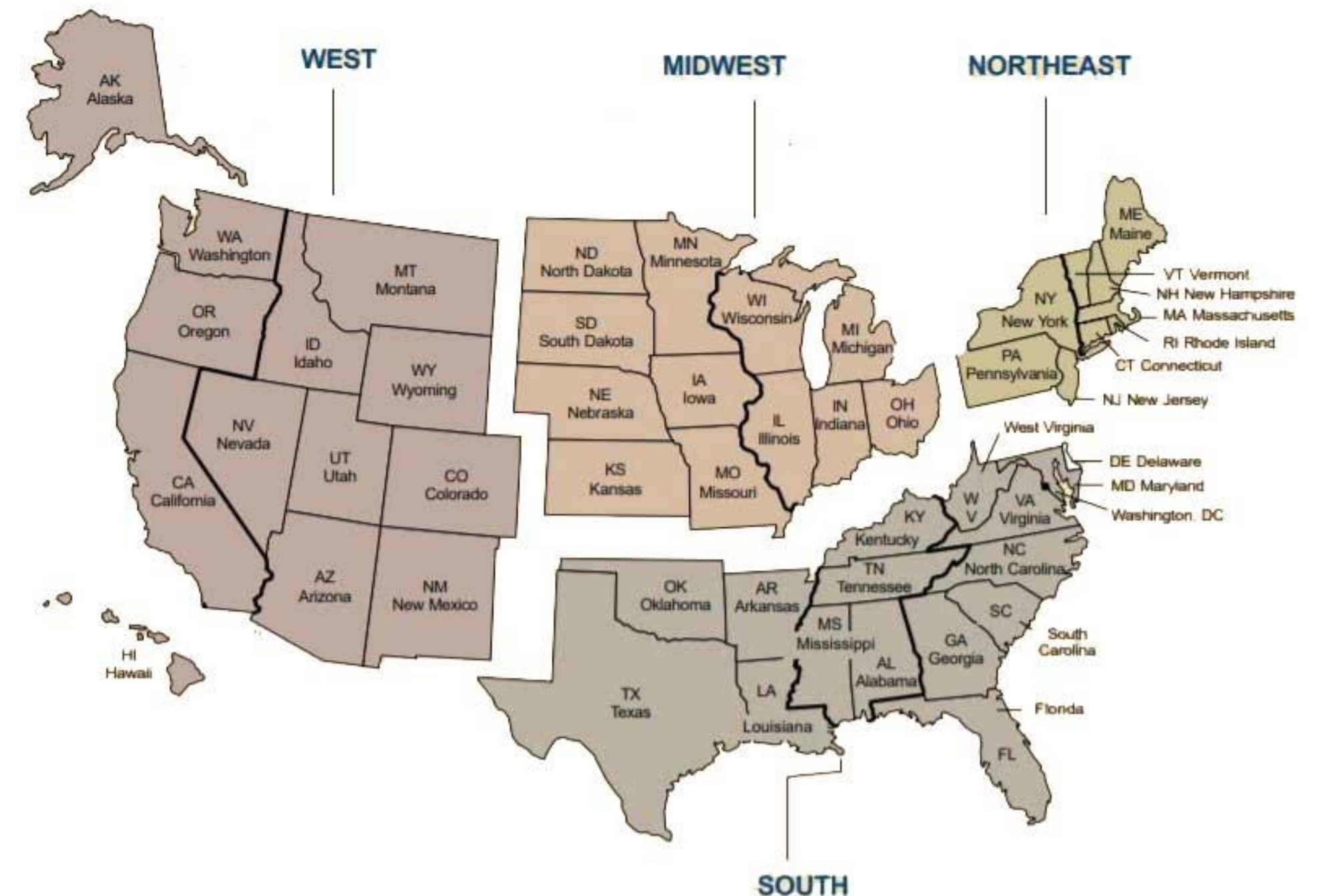
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# RESEARCH OVERVIEW & METHODOLOGY

- **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 29 data (fielded September 25th-27th) 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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NEWS

World          Business          Tech

Public transportation

Cases
**7.08M**
+54,536

Deaths
**204K**
+864

| | Cases ↓ | Deaths |
|---|---|---|
| California | 806K +4,062 | 15,542 +144 |
| Texas | 763K +3,265 | 15,697 +50 |
| Florida | 699K +2,847 | 14,021 +120 |
| New York | 459K +909 | 32,713 +12 |
| Georgia | 296K +1,755 | 6,717 +50 |

Daily change

Deaths ▾   🇺🇸 United States ▾   All regions ▾   All time ▾

**883**
September 25

3,000

2,000

1,000

0

Apr 15        May 24        Jul 2        Aug 10        Sep 18
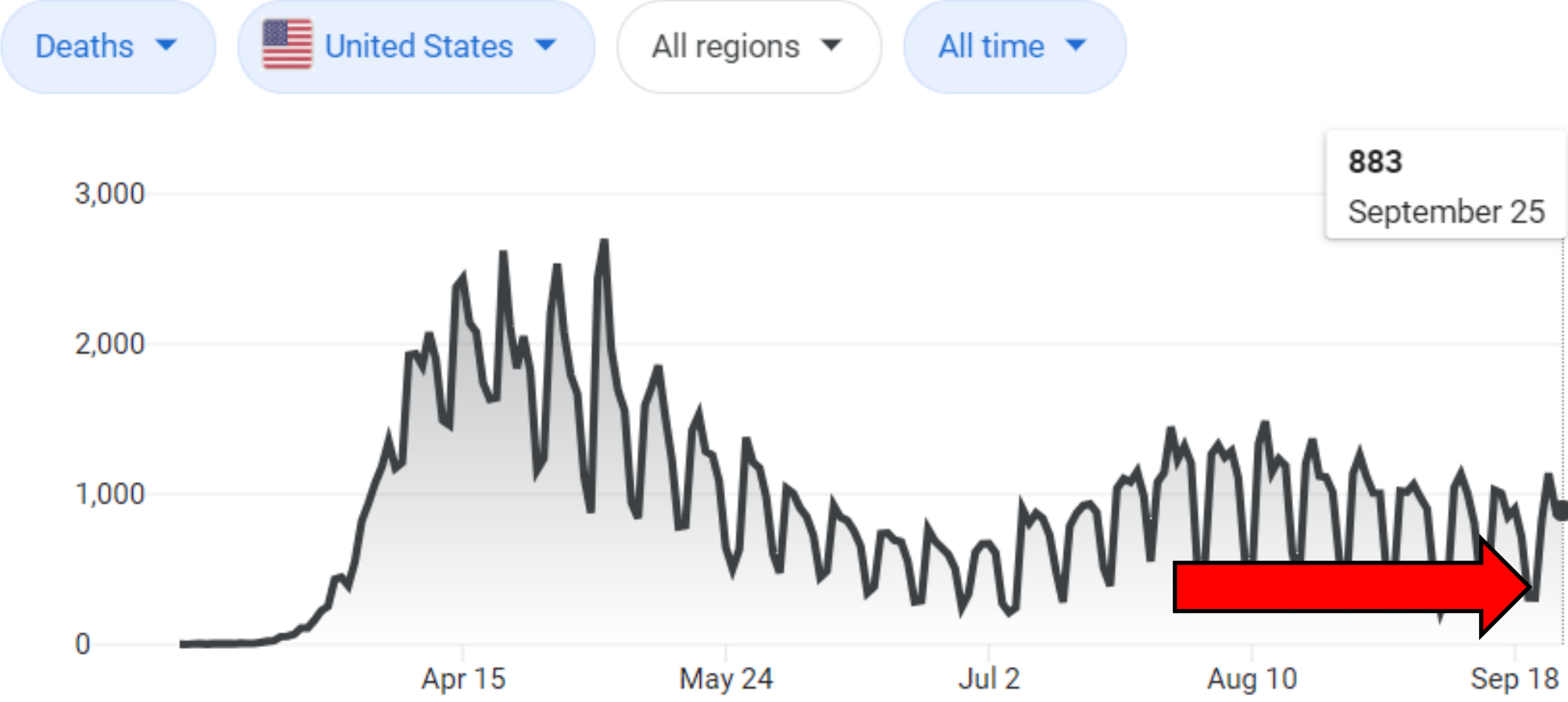
Each day shows deaths reported since the previous day · Updated less than 10 mins ago · Source: Wikipedia ·
About this data

# Positive COVID-19 test rates top 25% in some U.S. Midwest states

By Lisa Shumaker                                    3 MIN READ    f    t

(Reuters) - The number of tests coming back positive for COVID-19 is topping 25% in several states in the U.S. Midwest as cases and hospitalizations also surge in the region, according to a Reuters analysis.
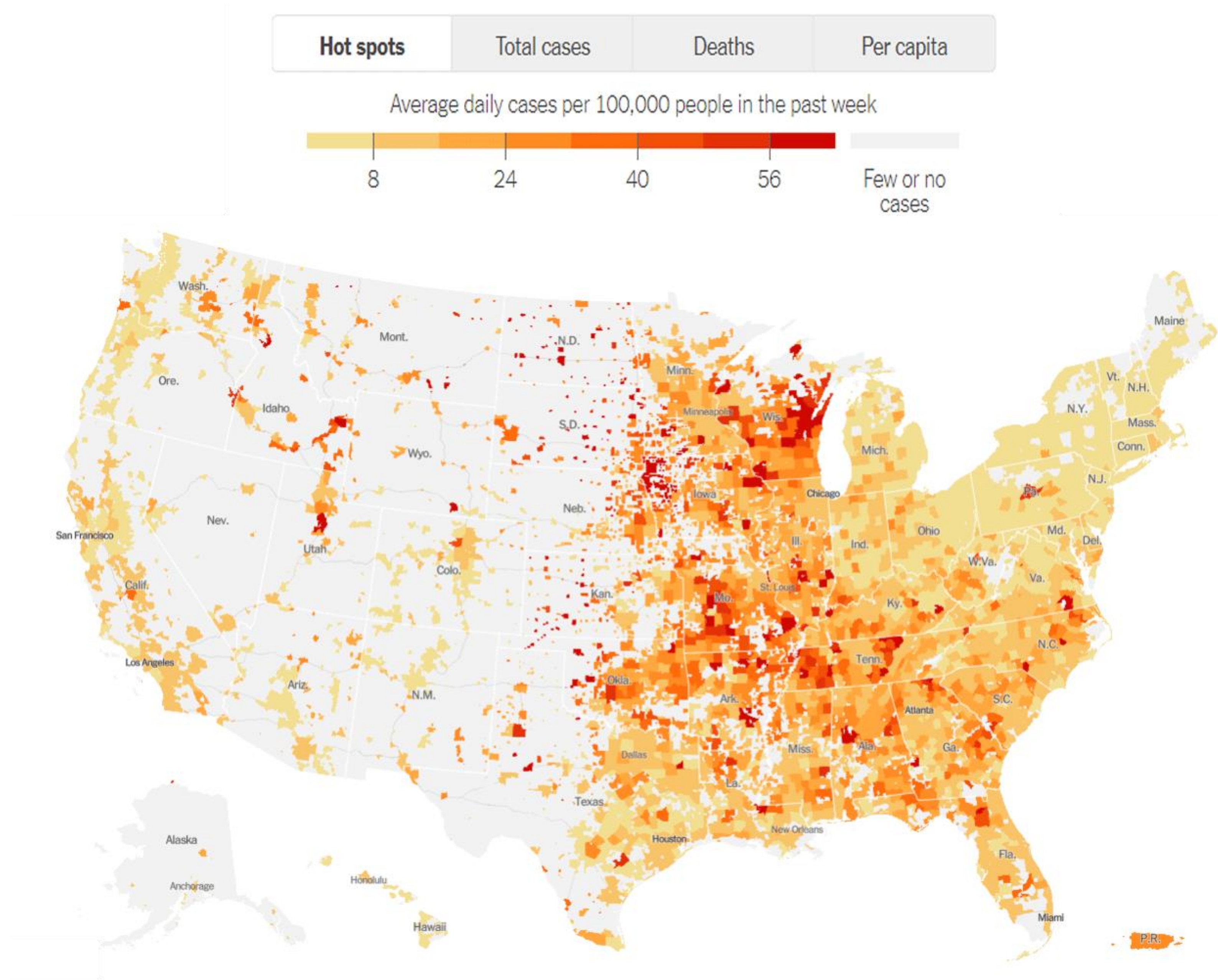


North Dakota's positive test rate has averaged 30% over the past seven days compared with 6% the prior week. The positivity rate has risen to 26% in South Dakota, up from 17% the previous week, according to the analysis using testing data from The COVID Tracking Project.

Minnesota and Montana are averaging 7% of tests coming back positive, but Montana's positivity rate rose on Sunday to 20%, according to the analysis.

The World Health Organization considers rates above 5% concerning because it suggests there are more cases in the community that have not yet been uncovered.

Several states such as New York, Massachusetts, Vermont and Maine have positive test rates of less than 1%.

Hot spots | Total cases | Deaths | Per capita

Average daily cases per 100,000 people in the past week

8    24    40    56    Few or no cases

# Experts project autumn surge in coronavirus cases, with a peak after Election Day



Autumn light illuminates a corner in D.C. in October 2019. Infectious-disease experts are warning of a cold-weather surge in coronavirus cases. (Matt McClain/The Washington Post)

By **Joel Achenbach** and **Rachel Weiner**

September 5, 2020 at 6:00 a.m. PDT

Infectious-disease experts are warning of a potential cold-weather surge of coronavirus cases — a long-feared "second wave" of infections and deaths, possibly at a catastrophic scale. It could begin well before Election Day, Nov. 3, although researchers assume the crest would come weeks later, closer to when fall gives way to winter.

An autumn surge in covid-19, the disease caused by the novel coronavirus, would not be an October surprise: It has been hypothesized since early in the pandemic because of the patterns of other respiratory viruses.

"My feeling is that there is a wave coming, and it's not so much whether it's coming but how big is it going to be," said Eili Klein, an epidemiologist at Johns Hopkins University School of Medicine.

The pandemic is already a dominant campaign issue, and it's not clear that even a spike in deaths would apply much torque to the presidential race. Outbreaks in some states could also bring pressure further down the ballot and conceivably affect turnout if there is so much community spread that voters who

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# Experts are warning of a coming surge of Covid-19 cases in US

By Christina Maxouris and Nicole Chavez, CNN

Updated 4:17 PM ET, Sat September 26, 2020



process
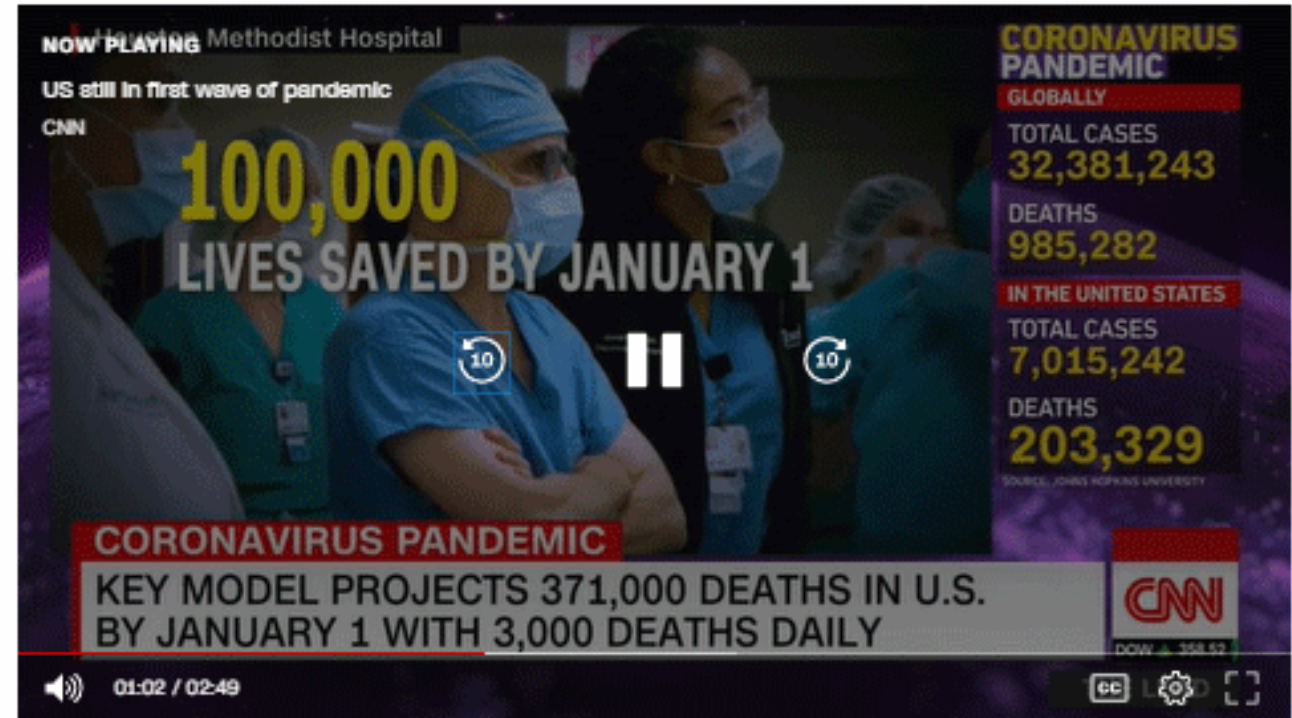
**(CNN)** — The US could see an explosion of Covid-19 cases as fall and winter set in, one expert says, joining a chorus of health officials who have warned about the challenges of the coming months.

Two things will likely help drive that expected winter surge, according to Dr. Chris Murray, director of the University of Washington's Institute for Health Metrics and Evaluation (IHME).



Related Article: Covid-19 vaccinations could start in November or December, Fauci says

"First, as case counts have come down in some states, we tend to see that people become less careful, they tend to have more contact," he said. "But then the most important effect is the seasonality of the virus, that people go indoors, transmission happens more."

The IHME model indicates that the country is currently seeing about 765 daily deaths from Covid-19, but that number could jump to 3,000 daily deaths by late December.

More than 204,000 Americans have already died from the virus since the start of the pandemic and more than 7 million have been infected, according to Johns Hopkins University. At least 24 states are now reporting a rise in new cases compared to the previous week, mostly across the US heartland and Midwest, according to data from Johns Hopkins.

# How Travelers are Feeling Now

# 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)



Historical data

Bar chart values:
- I'm already traveling: 12.1%
- I'm ready to travel, with no hesitations: 12.4%
- I'm ready to travel, but feel some hesitation: 27.7%
- I need a little more time to be ready to travel: 22.9%
- I need a lot more time to be ready to travel: 24.9%

**24.5%**
**47.8%**

Historical data line chart (Ready to travel / Not 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%, 52.2%
50.0%, 47.0%, 49.6%, 51.9%, 56.1%, 54.2%, 56.6%, 51.2%, 54.6%, 50.0%, 52.7%, 45.2%, 45.5%, 43.6%, 45.8%, 47.8%

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, Sep 25-27

*(Base: Waves 12-13 and 15-29. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*

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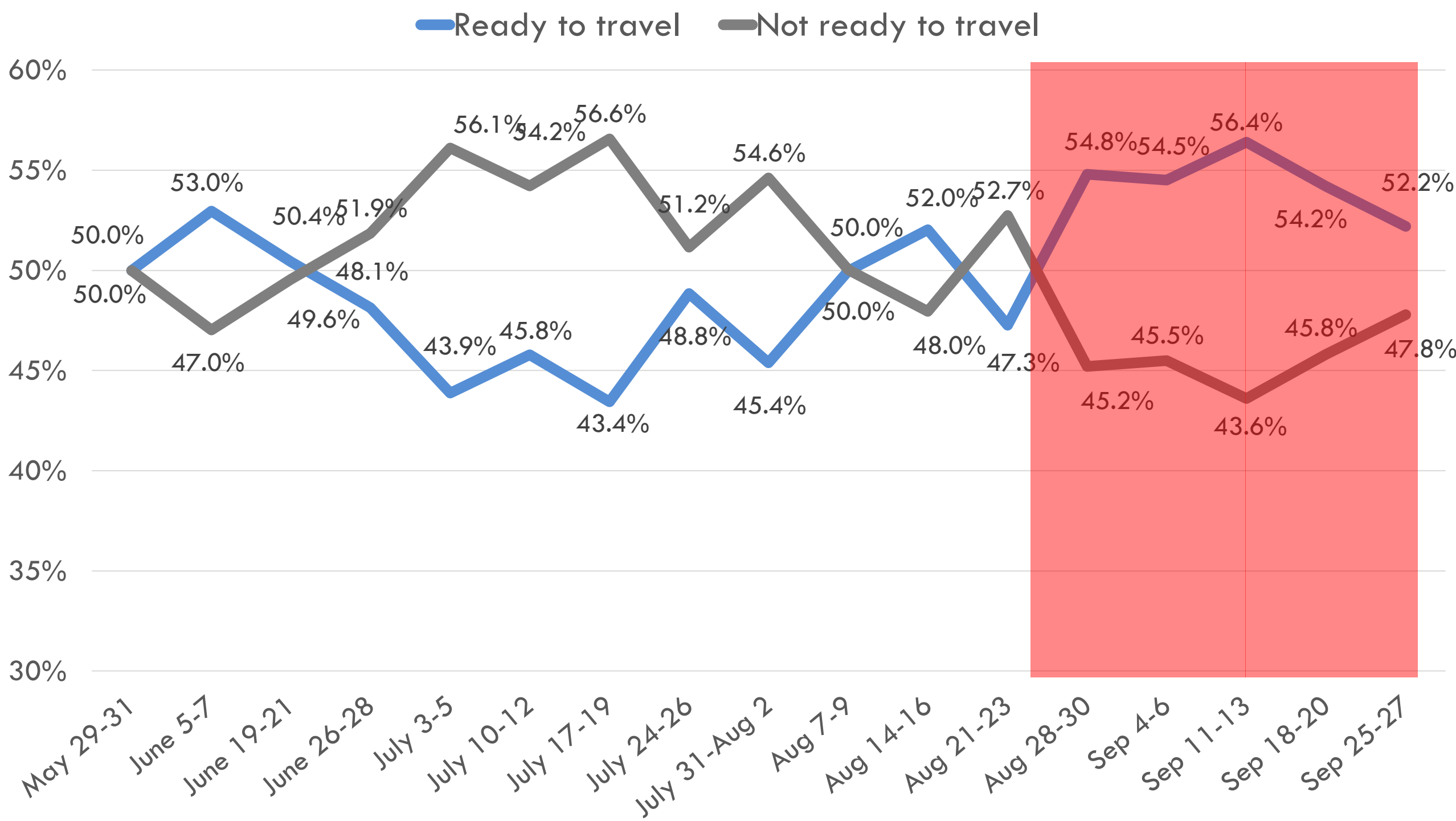
# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

**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 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*

Get much worse — 9.7%

Get worse — 33.3%

Neither worsen nor get better — 35.7%

Get better — 16.7%

Get much better — 4.6%

**43.0%**

38.3% Last week

**21.3%**

22.8% Last week

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# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-29)

**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 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*
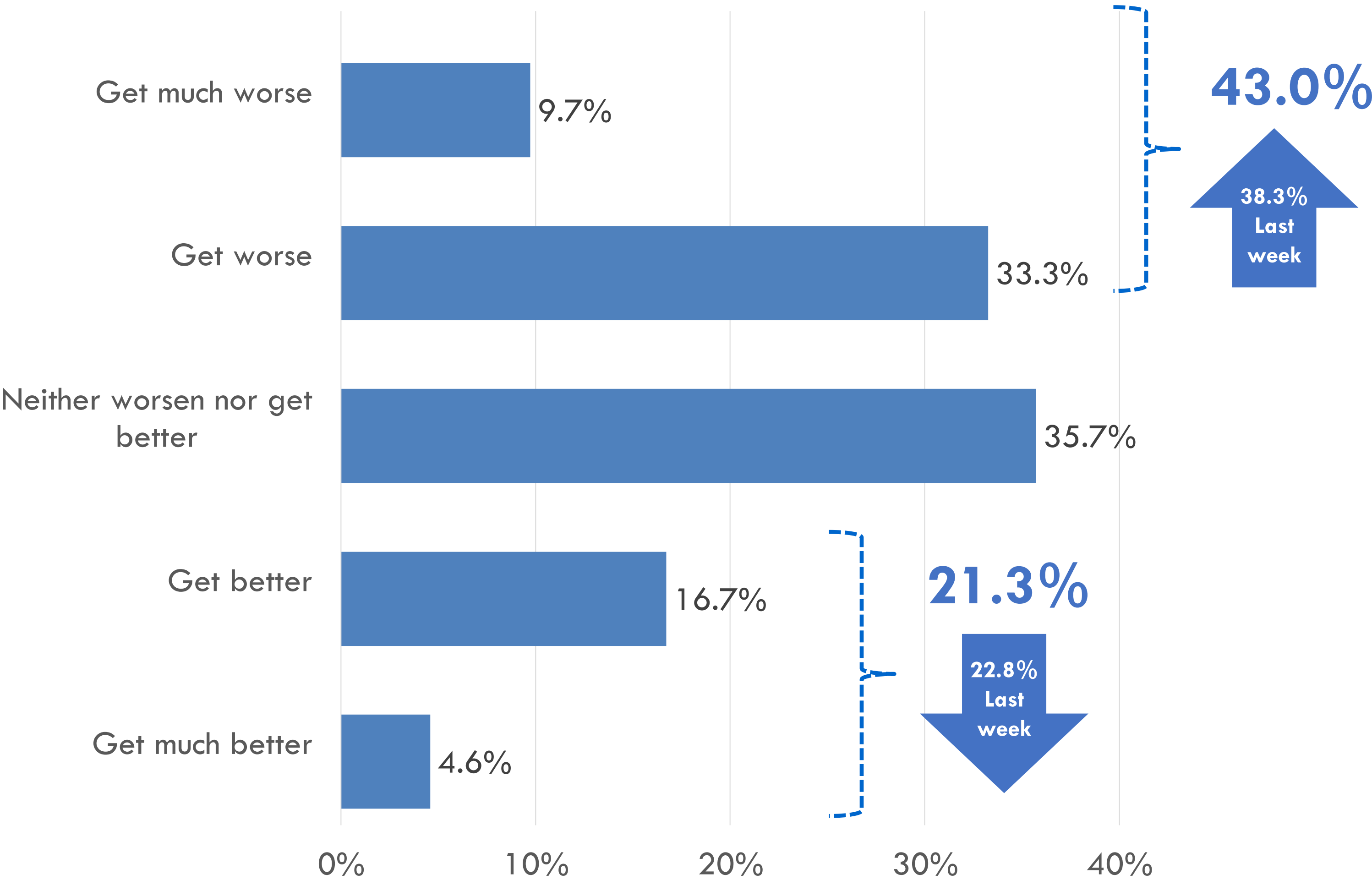


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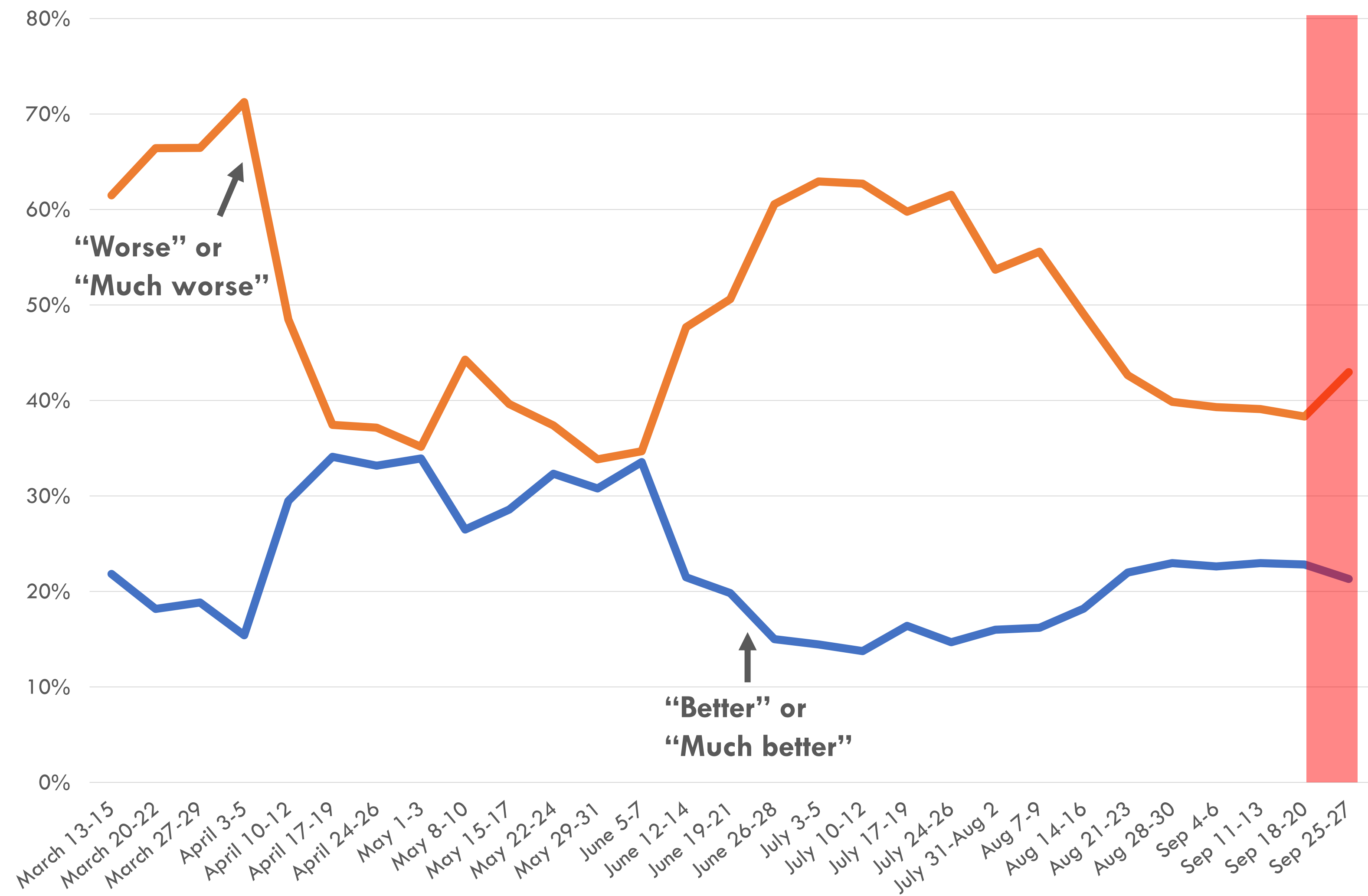
# PERSONAL HEALTH CONCERNS

**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 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*

**70.9%**

69.8% Last week



| Scale | Percentage |
|-------|-----------|
| 0 - Not at all concerned | 4.1% |
| 1 | 4.2% |
| 2 | 3.1% |
| 3 | 3.7% |
| 4 | 1.9% |
| 5 - Neutral – Neither Concerned nor unconcerned | 12.1% |
| 6 | 10.6% |
| 7 | 14.4% |
| 8 | 16.8% |
| 9 | 9.1% |
| 10 - Extremely concerned | 19.9% |

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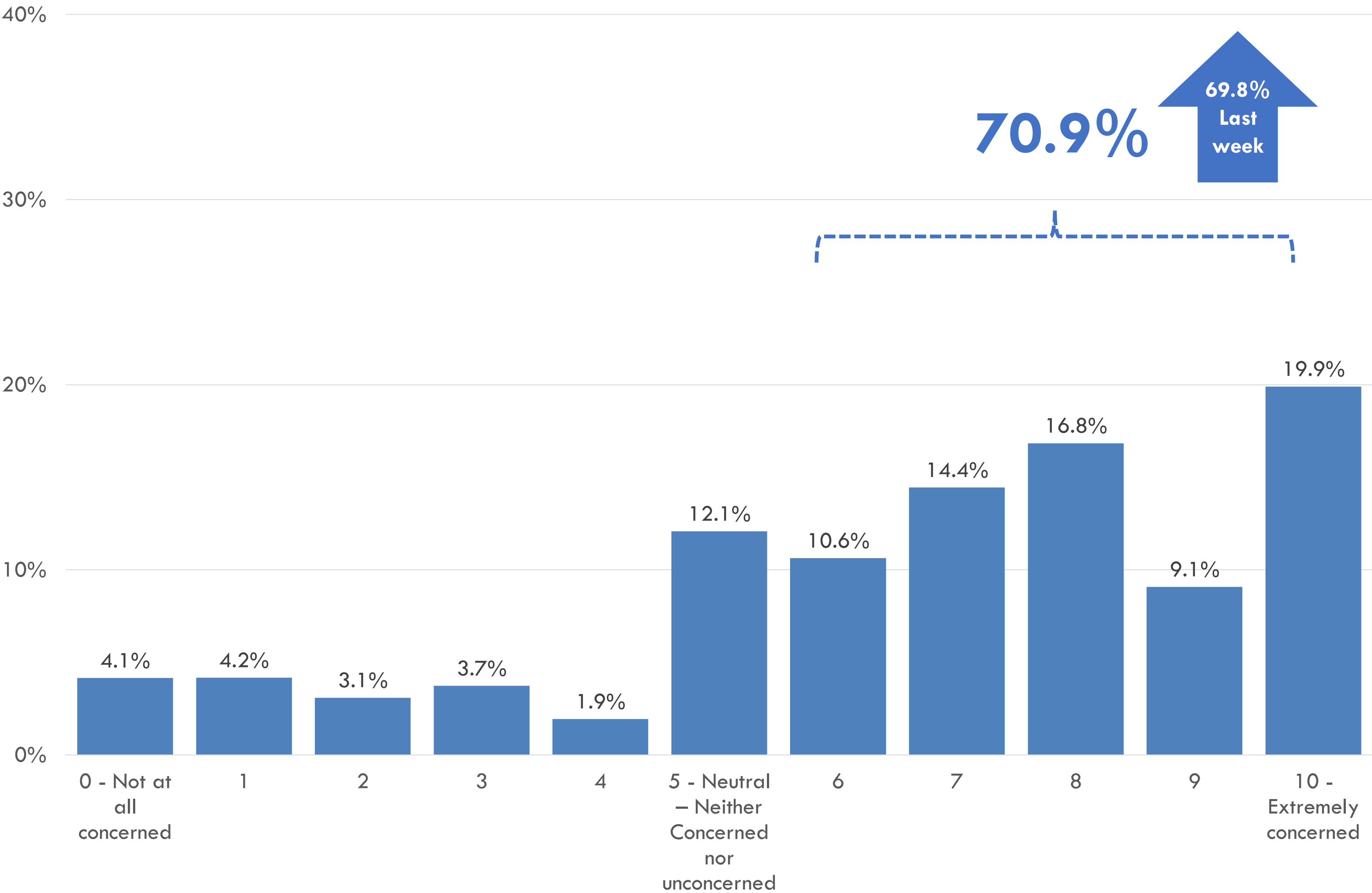
# PERSONAL HEALTH CONCERNS
## MARCH – SEPTEMBER

**CONCERNED ABOUT PERSONAL HEALTH** (AVERAGE SCORE ON AN 11-POINT SCALE)



More concern

Less concern

Data points (March 13-15 through Sep 25-27): 6.2, 6.9, 7.0, 6.9, 7.0, 6.9, 6.7, 6.6, 6.7, 6.7, 6.6, 6.5, 6.4, 6.4, 6.5, 6.8, 6.9, 6.9, 6.9, 6.9, 6.7, 6.8, 6.8, 6.8, 6.6, 6.6, 6.5, 6.6, 6.7

X-axis labels: March 13-15, March 20-22, March 27-29, April 3-5, April 10-12, April 17-19, April 24-26, May 1-3, May 8-10, May 15-17, May 22-24, May 29-31, June 5-7, June 12-14, June 19-21, June 26-28, July 3-5, July 10-12, July 17-19, July 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, Aug 21-23, Aug 28-30, Sep 4-6, Sep 11-13, Sep 18-20, Sep 25-27

**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?**

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# HEALTH CONCERNS (FAMILY & FRIENDS)

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

*(Base: Wave 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*
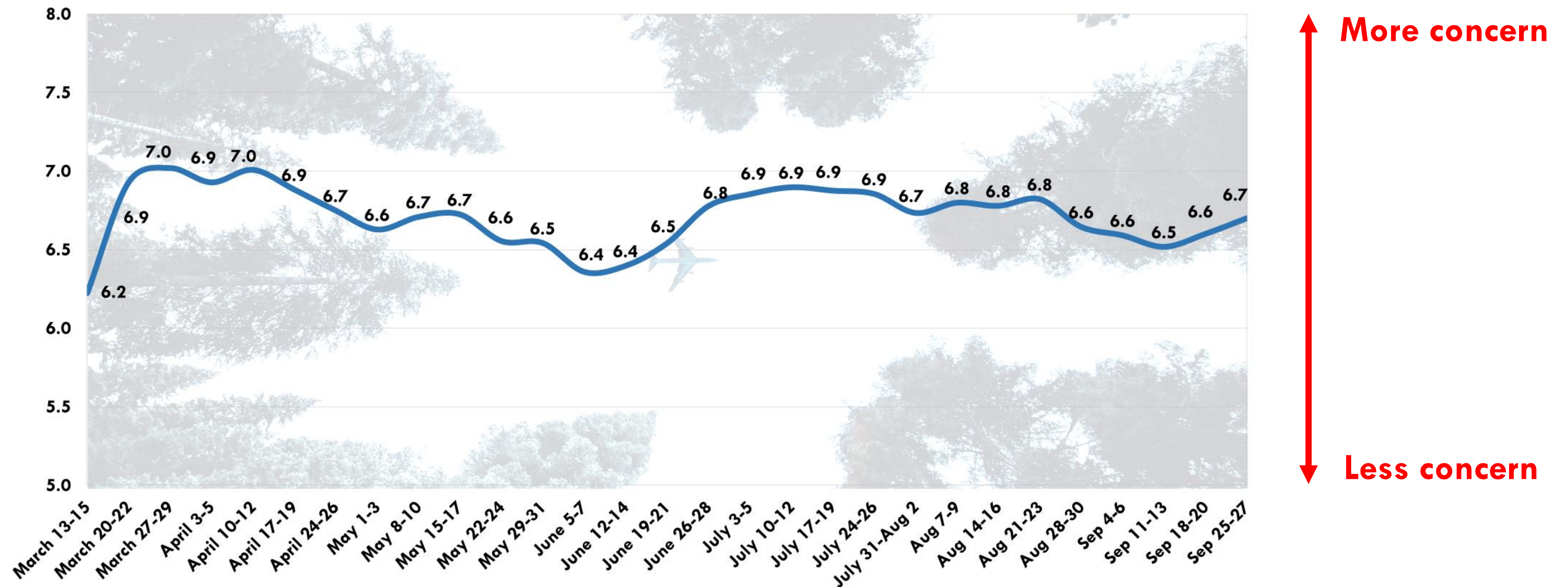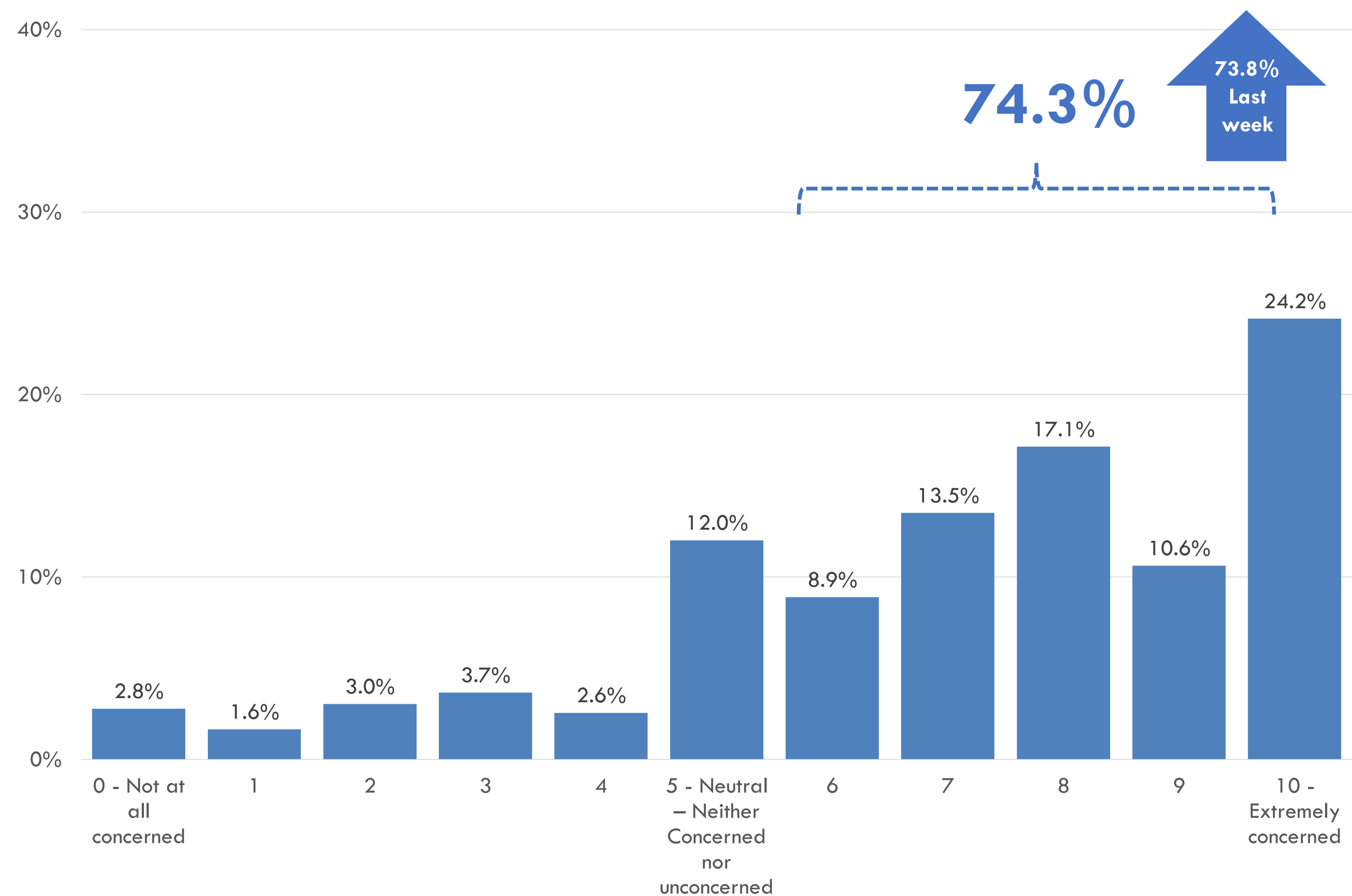
**74.3%**

73.8% Last week



| Scale | Percentage |
|---|---|
| 0 - Not at all concerned | 2.8% |
| 1 | 1.6% |
| 2 | 3.0% |
| 3 | 3.7% |
| 4 | 2.6% |
| 5 - Neutral – Neither Concerned nor unconcerned | 12.0% |
| 6 | 8.9% |
| 7 | 13.5% |
| 8 | 17.1% |
| 9 | 10.6% |
| 10 - Extremely concerned | 24.2% |

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# HEALTH CONCERNS (FAMILY & FRIENDS)
## MARCH — SEPTEMBER

**CONCERNED ABOUT THE HEALTH OF FAMILY OR FRIENDS**
(AVERAGE SCORE ON AN 11-POINT SCALE)
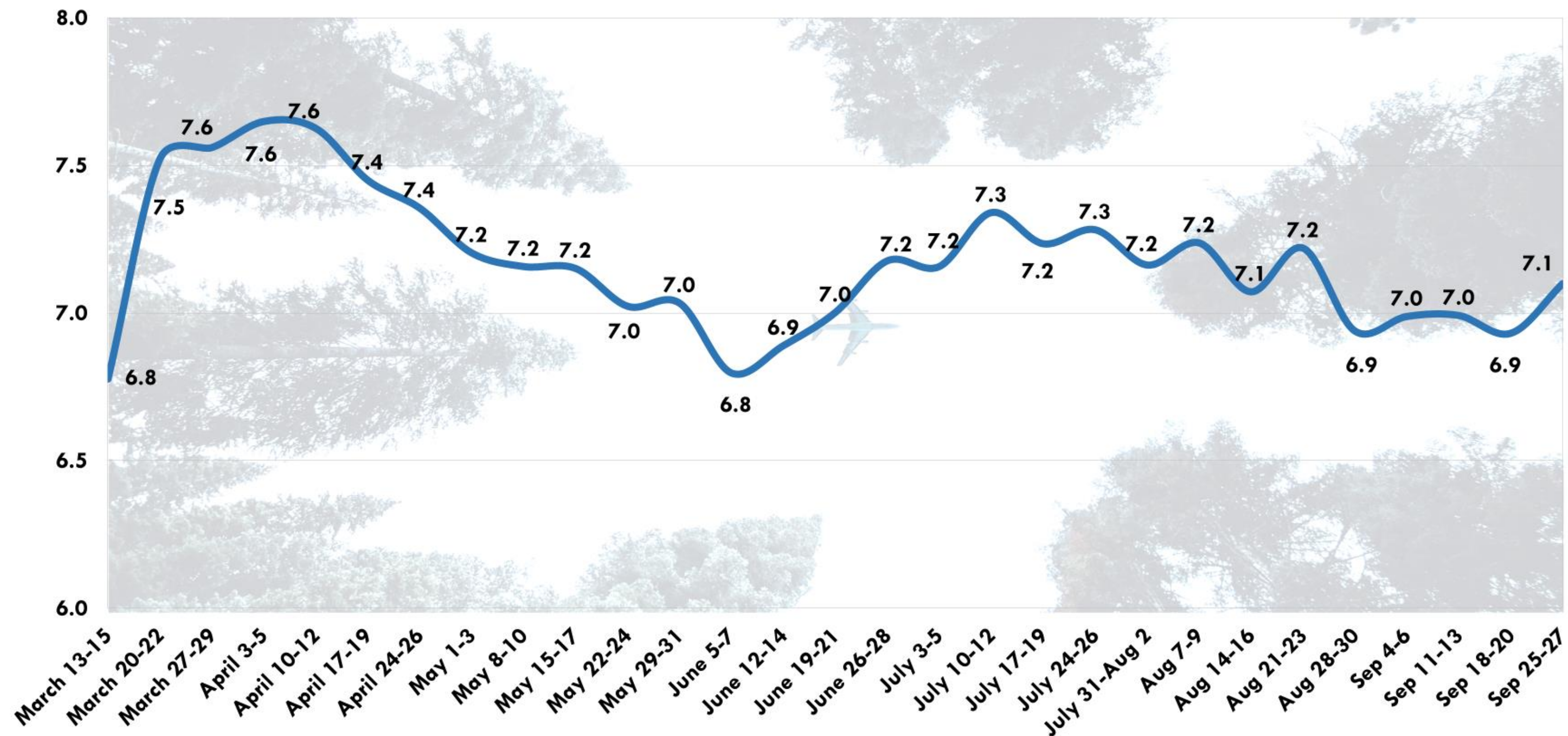


**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?**

*(Base: Waves 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 , 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*

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# CONCERNS ABOUT PERSONAL FINANCES

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

*(Base: Wave 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*



**56.5%**   56.7% Last week

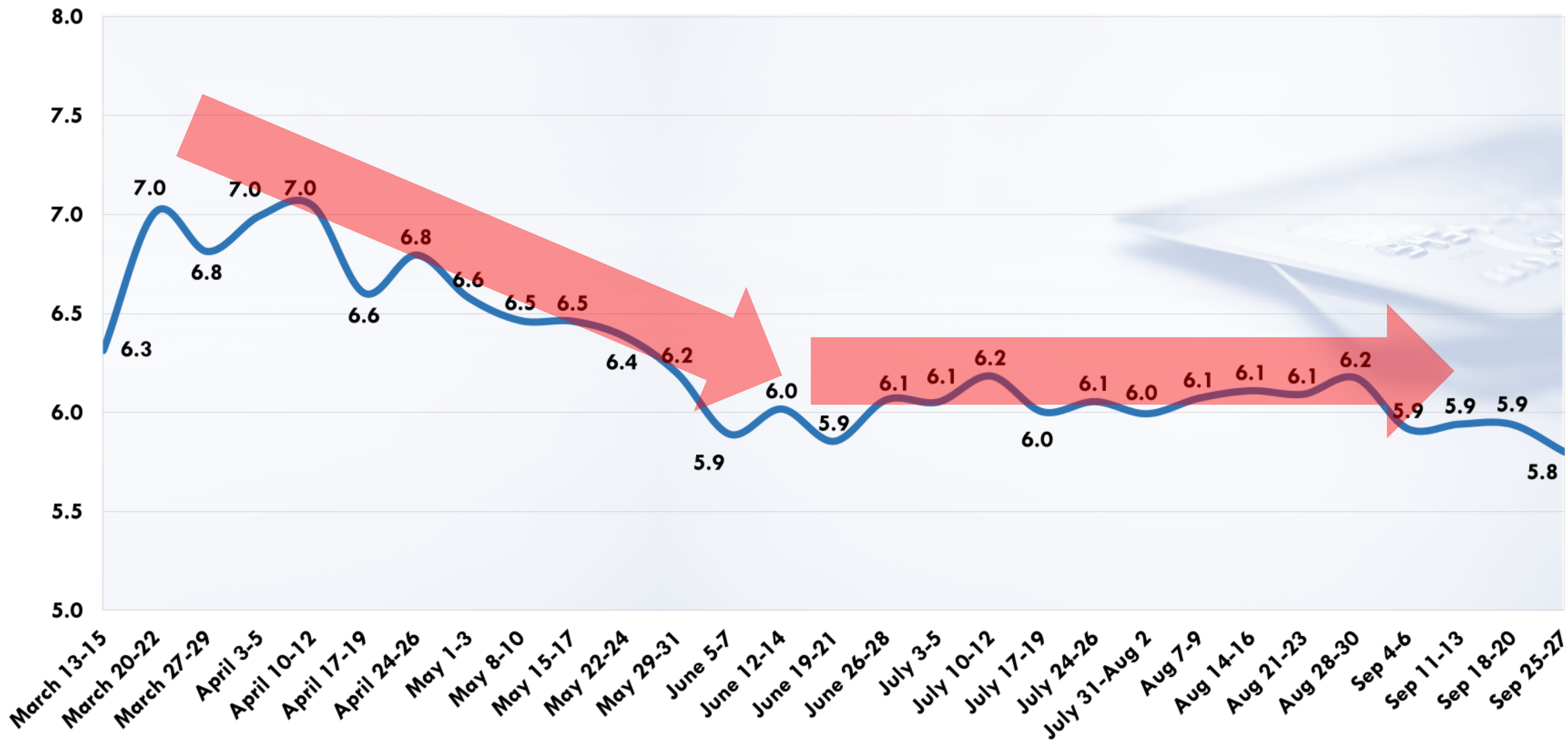| | Percentage |
|---|---|
| 0 - Not at all concerned | 9.7% |
| 1 | 4.6% |
| 2 | 3.9% |
| 3 | 3.8% |
| 4 | 2.9% |
| 5 - Neutral – Neither Concerned nor unconcerned | 18.7% |
| 6 | 11.2% |
| 7 | 11.0% |
| 8 | 13.3% |
| 9 | 7.2% |
| 10 - Extremely concerned | 13.9% |
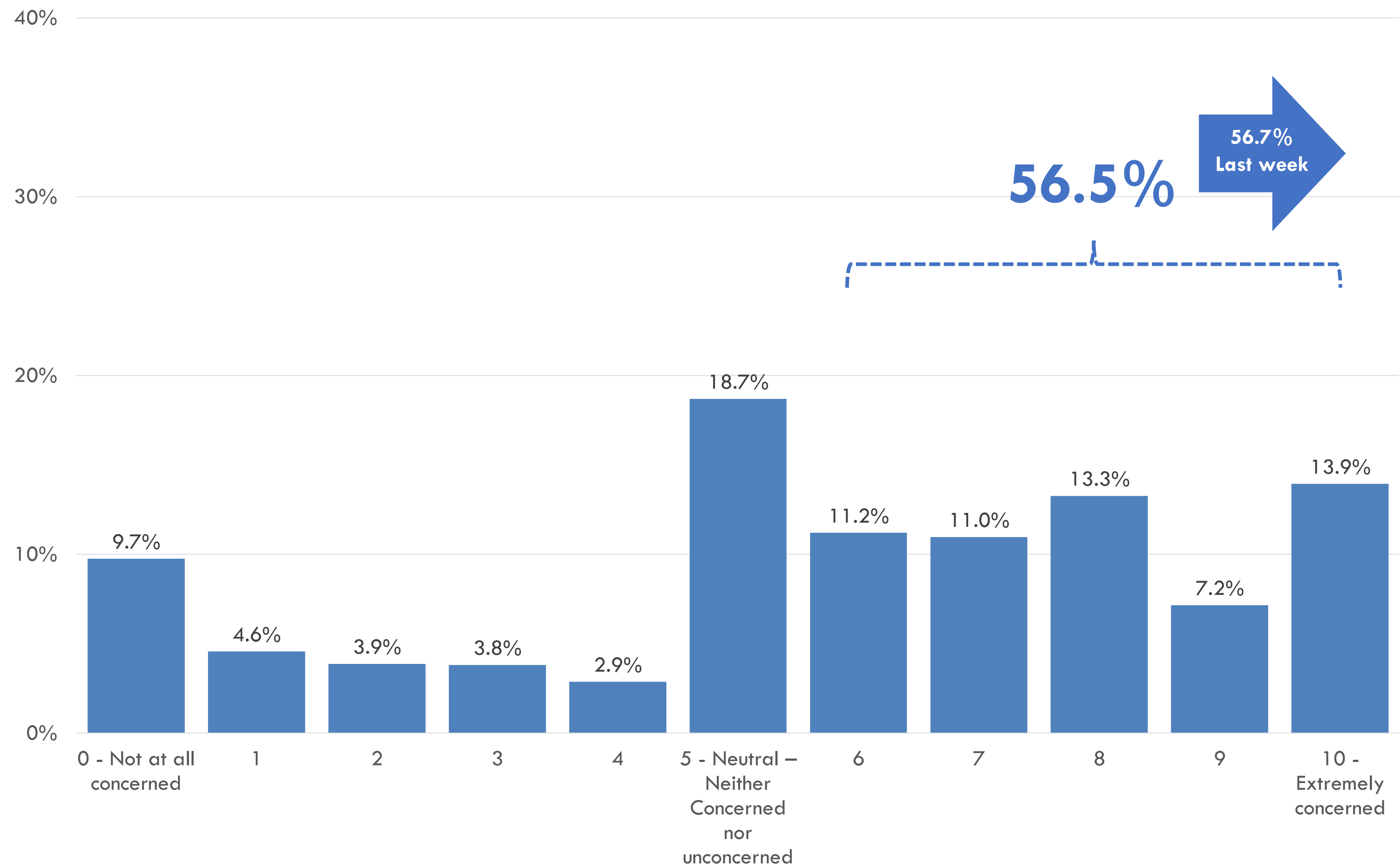
# CONCERNS ABOUT PERSONAL FINANCES
## MARCH — SEPTEMBER



CONCERNED ABOUT PERSONAL FINANCES (AVERAGE SCORE ON AN 11-POINT SCALE)

QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON YOUR PERSONAL FINANCES?

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# CONCERNS ABOUT NATIONAL ECONOMY

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

*(Base: Wave 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*

**81.2%**

83.8% Last week

| Response | Percentage |
|----------|-----------|
| 0 - Not at all concerned | 1.3% |
| 1 | 0.6% |
| 2 | 0.8% |
| 3 | 1.8% |
| 4 | 2.3% |
| 5 - Neutral – Neither Concerned nor unconcerned | 12.0% |
| 6 | 9.3% |
| 7 | 16.0% |
| 8 | 18.2% |
| 9 | 11.1% |
| 10 - Extremely concerned | 26.6% |

# CONCERNS ABOUT NATIONAL ECONOMY
## MARCH – SEPTEMBER
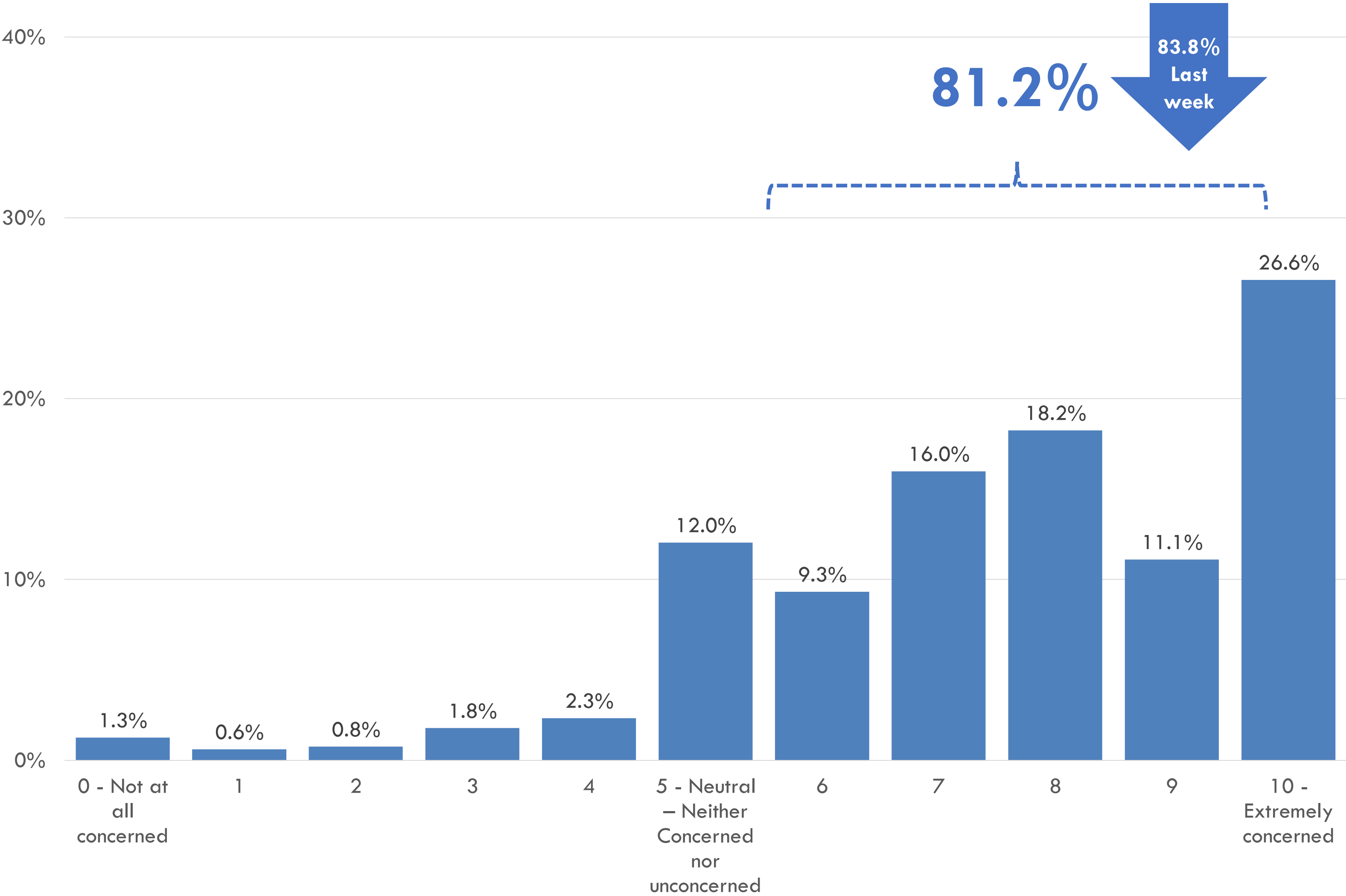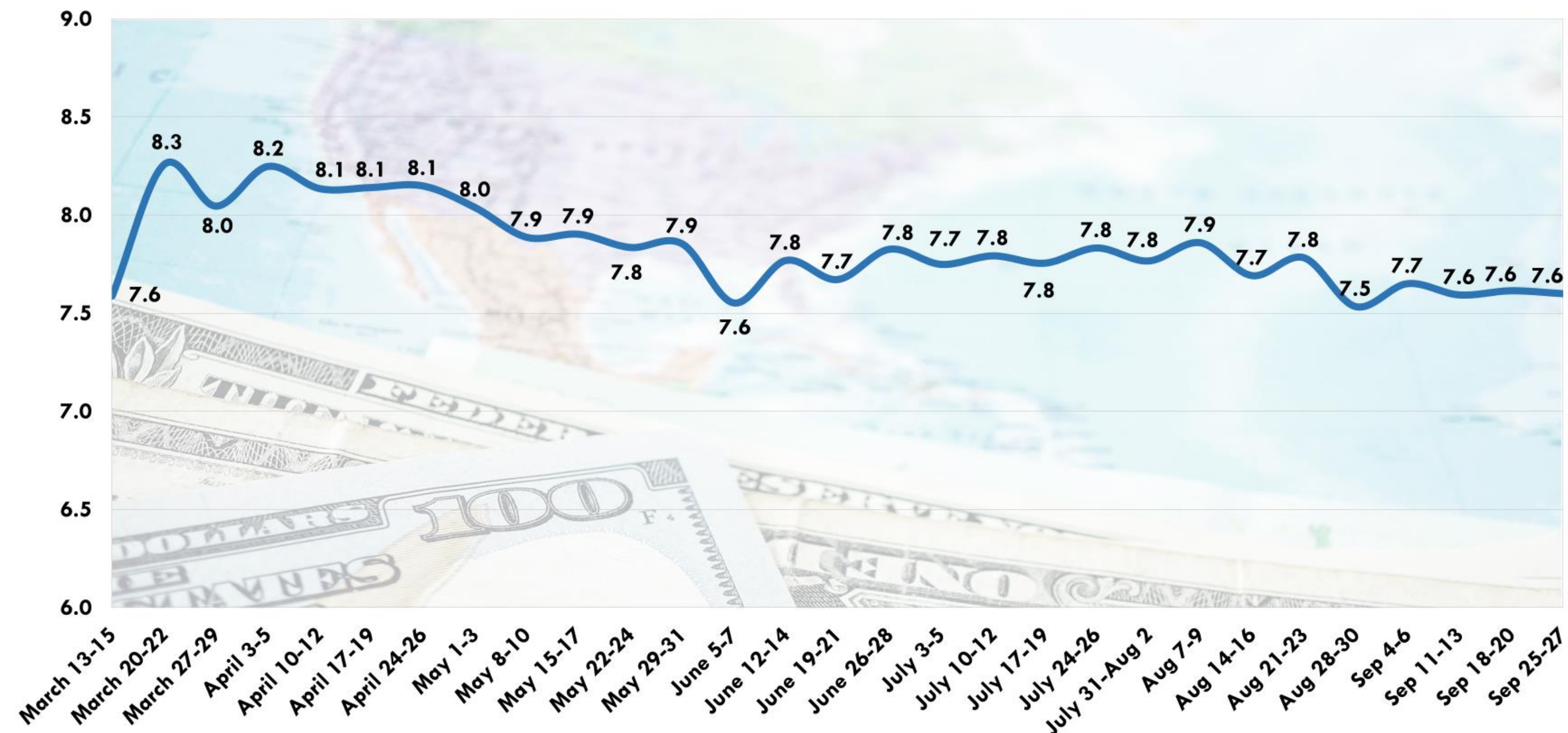
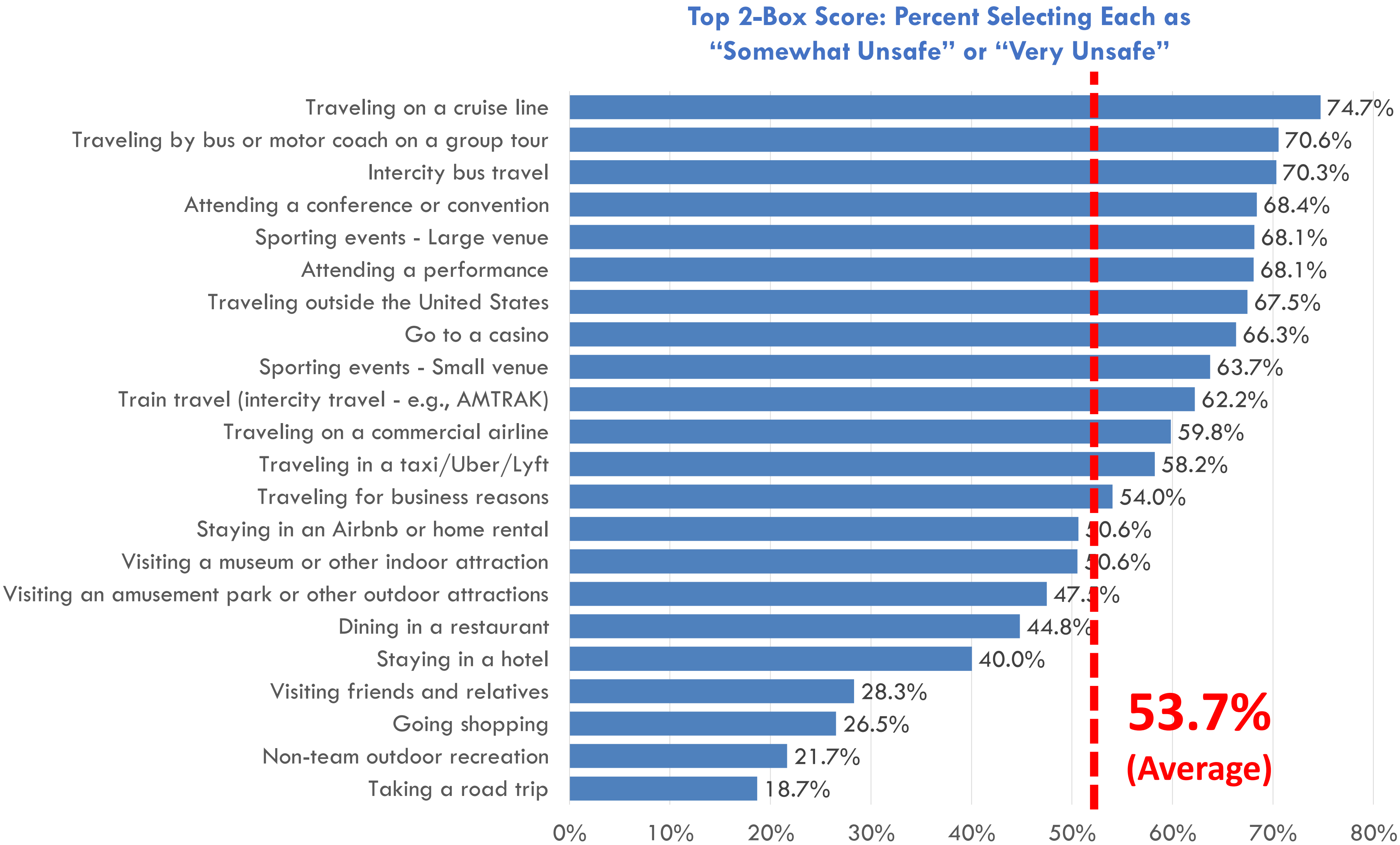**CONCERNED ABOUT NATIONAL ECONOMY** (AVERAGE SCORE ON AN 11-POINT SCALE)



**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE NATIONAL ECONOMY?**

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# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 29)

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

*(Base: Wave 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*

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

| Activity | Percent |
|---|---|
| Traveling on a cruise line | 74.7% |
| Traveling by bus or motor coach on a group tour | 70.6% |
| Intercity bus travel | 70.3% |
| Attending a conference or convention | 68.4% |
| Sporting events - Large venue | 68.1% |
| Attending a performance | 68.1% |
| Traveling outside the United States | 67.5% |
| Go to a casino | 66.3% |
| Sporting events - Small venue | 63.7% |
| Train travel (intercity travel - e.g., AMTRAK) | 62.2% |
| Traveling on a commercial airline | 59.8% |
| Traveling in a taxi/Uber/Lyft | 58.2% |
| Traveling for business reasons | 54.0% |
| Staying in an Airbnb or home rental | 50.6% |
| Visiting a museum or other indoor attraction | 50.6% |
| Visiting an amusement park or other outdoor attractions | 47.1% |
| Dining in a restaurant | 44.8% |
| Staying in a hotel | 40.0% |
| Visiting friends and relatives | 28.3% |
| Going shopping | 26.5% |
| Non-team outdoor recreation | 21.7% |
| Taking a road trip | 18.7% |

**53.7% (Average)**

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# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-29 COMPARISON)

**Question:** At this moment, how safe would you feel doing each type of travel activity?
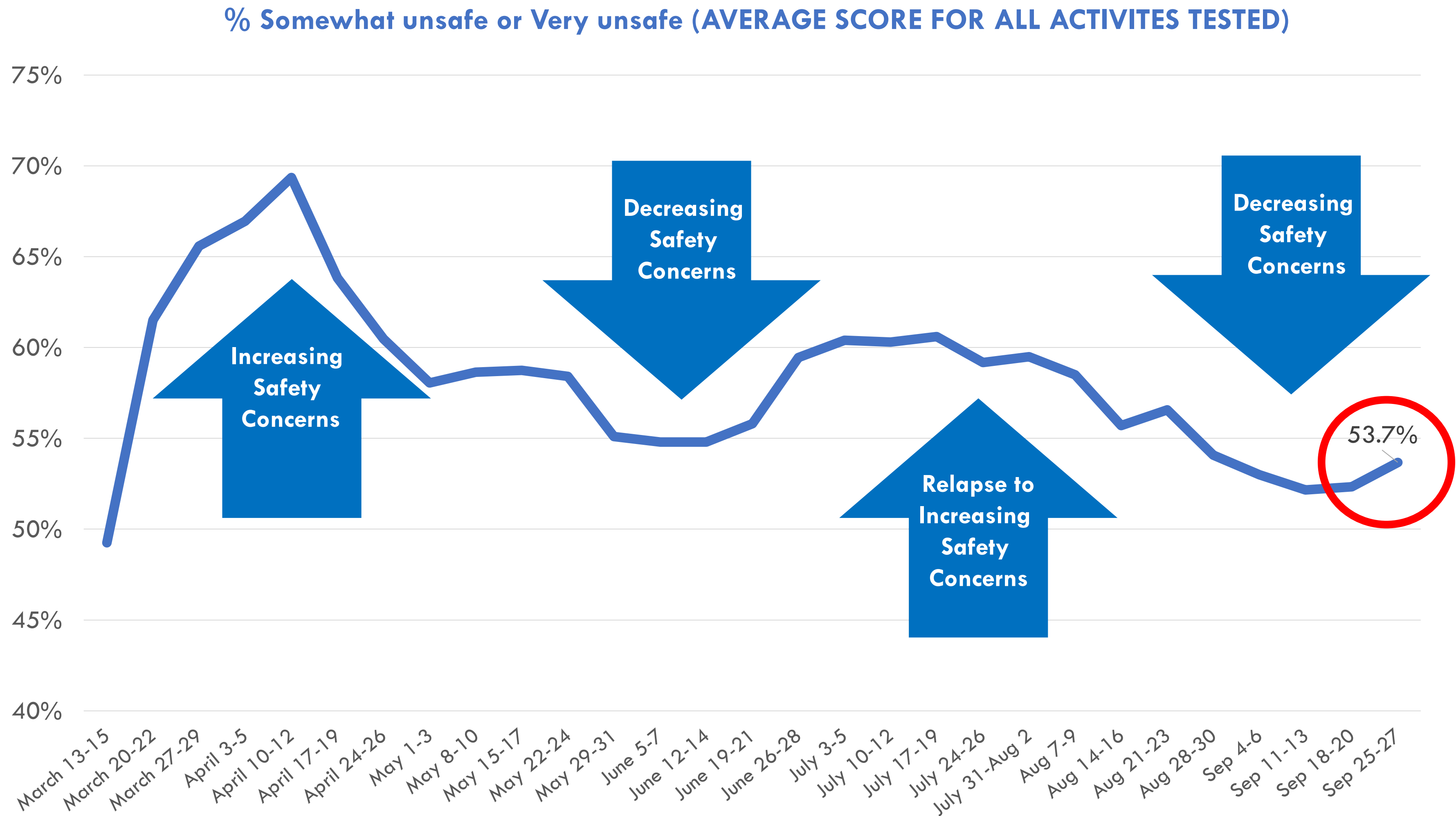
*(Base: Waves 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*
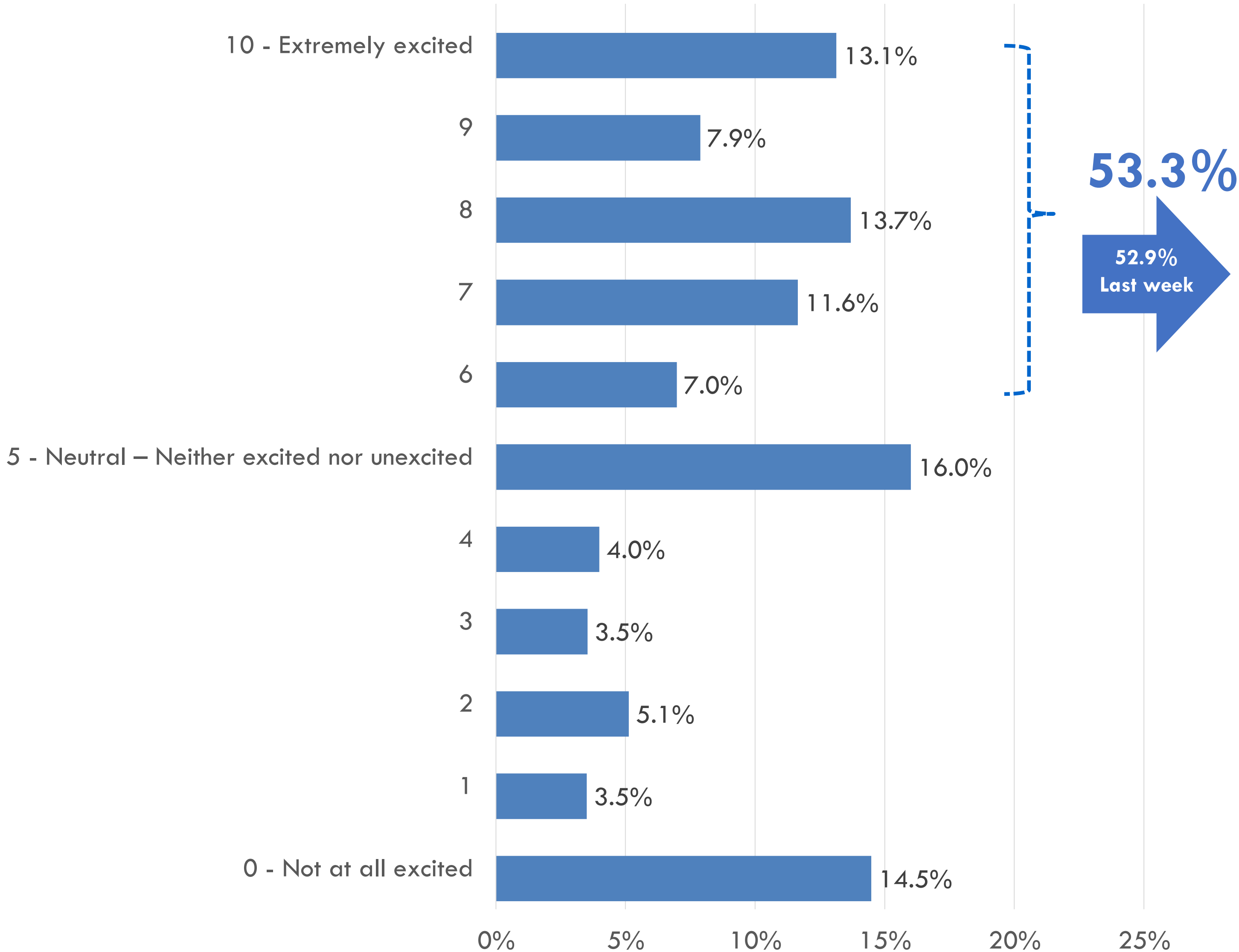
**% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITES TESTED)**



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# OPENNESS TO TRAVEL INSPIRATION

**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 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*

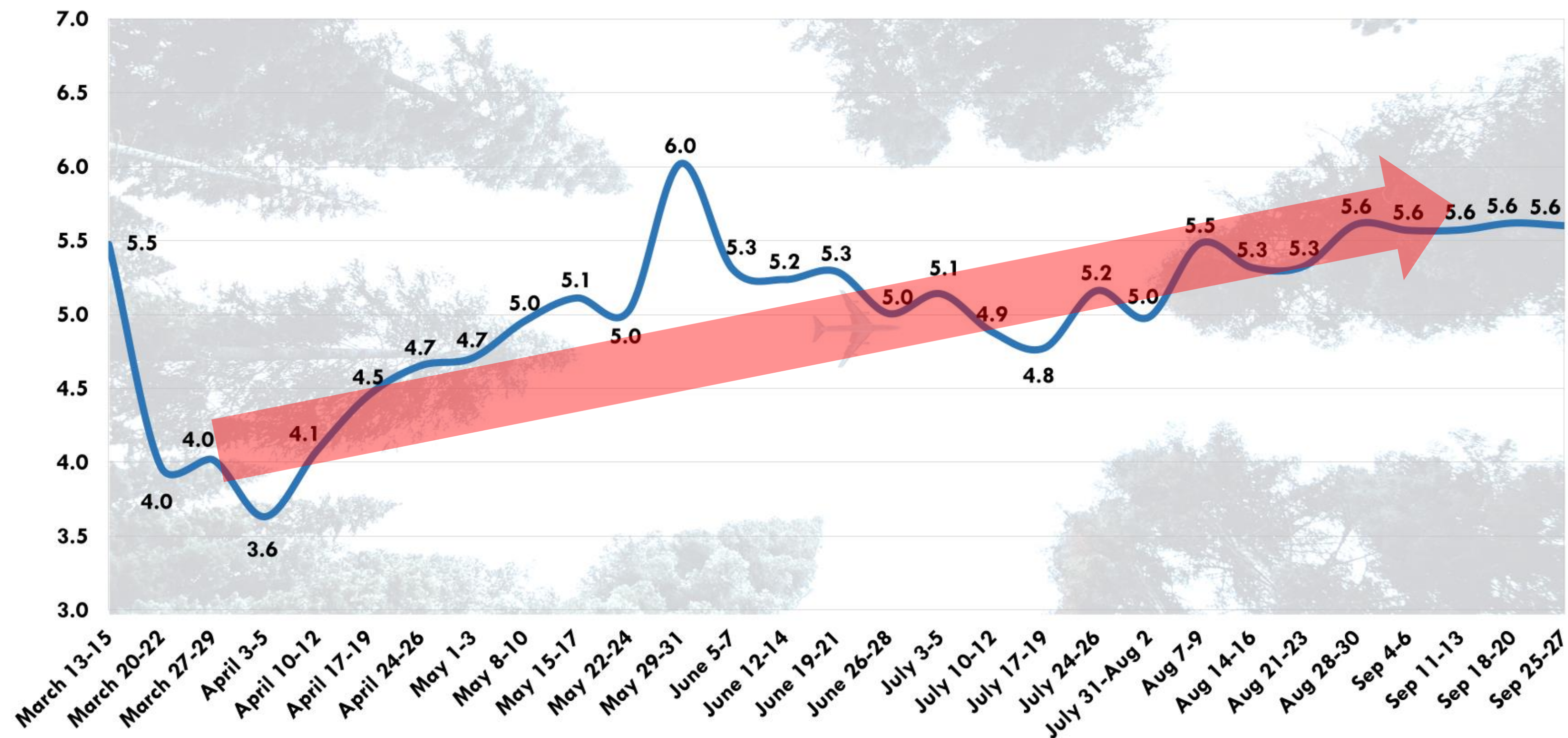| Response | % |
|---|---|
| 10 - Extremely excited | 13.1% |
| 9 | 7.9% |
| 8 | 13.7% |
| 7 | 11.6% |
| 6 | 7.0% |
| 5 - Neutral — Neither excited nor unexcited | 16.0% |
| 4 | 4.0% |
| 3 | 3.5% |
| 2 | 5.1% |
| 1 | 3.5% |
| 0 - Not at all excited | 14.5% |

**53.3%**

52.9% Last week

# EXCITEMENT TO TRAVEL RIGHT NOW
## MARCH – SEPTEMBER

**EXCITED TO TRAVEL RIGHT NOW** (AVERAGE SCORE ON AN 11-POINT SCALE)



More excitement

Less excitement

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: Waves 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 , 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*

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# OPENNESS TO TRAVEL INFORMATION

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

*(Base: Wave 29 data. All respondents, 1,205 completed surveys. Data collected Sep 25-27, 2020)*



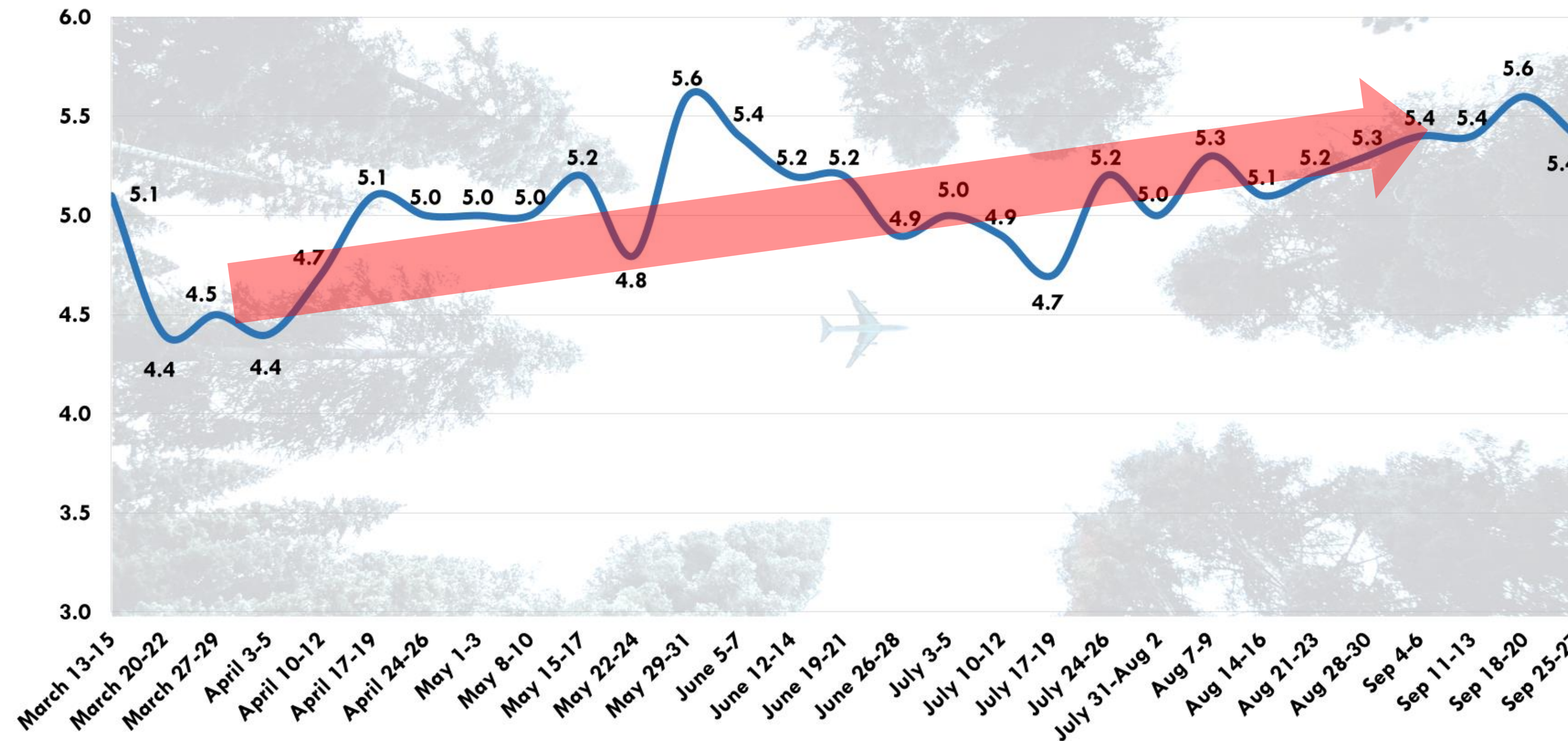| Rating | Percentage |
|---|---|
| 10 - Extremely excited | 11.4% |
| 9 | 5.9% |
| 8 | 12.4% |
| 7 | 10.5% |
| 6 | 9.1% |
| 5 - Neutral – Neither excited nor unexcited | 21.2% |
| 4 | 4.3% |
| 3 | 4.1% |
| 2 | 5.0% |
| 1 | 2.7% |
| 0 - Not at all excited | 13.4% |

**49.3%**

**51.8% last week**
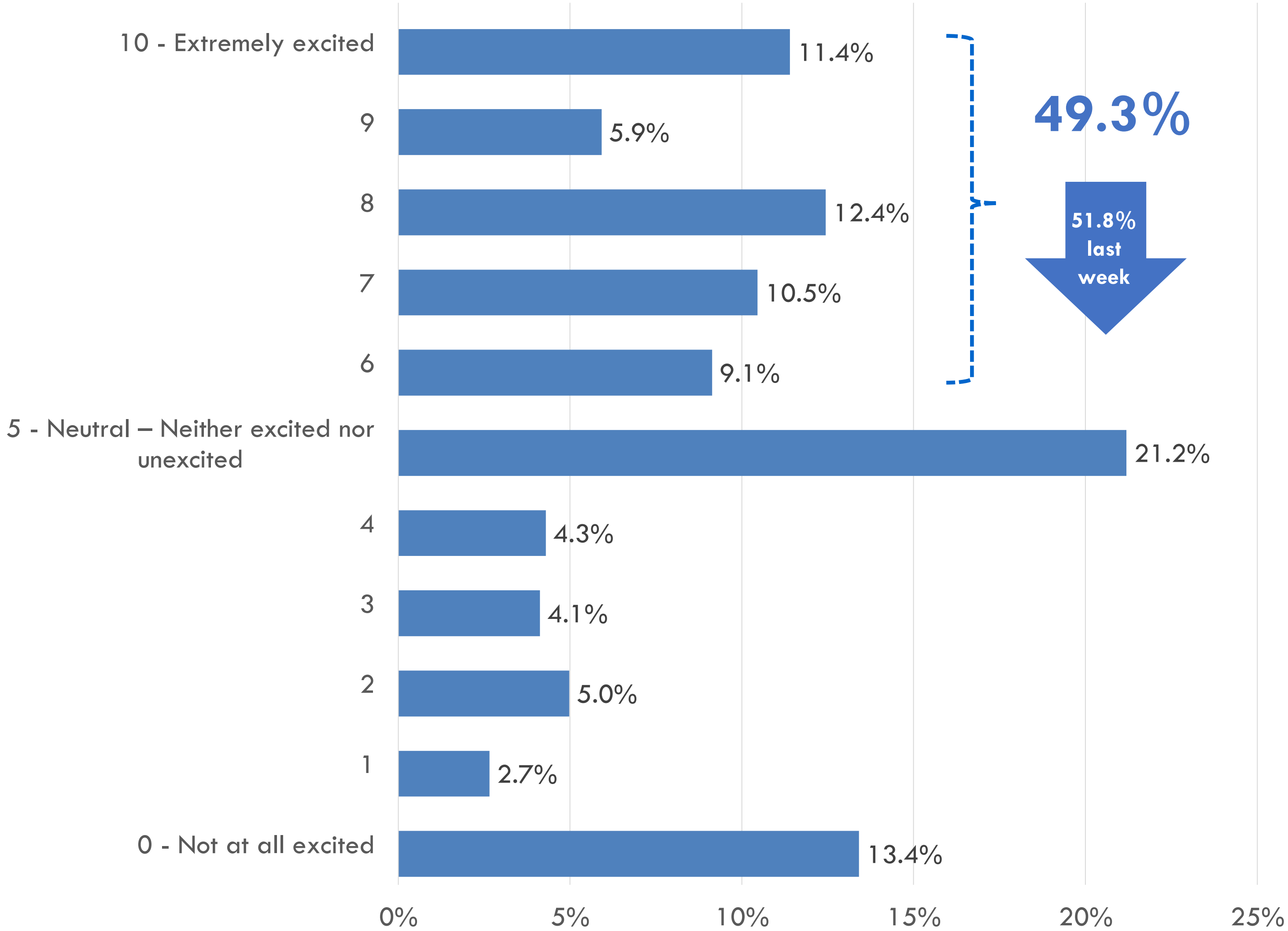
# OPENNESS TO TRAVEL INSPIRATION
## MARCH – SEPTEMBER

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



**More openness**

**Less openness**

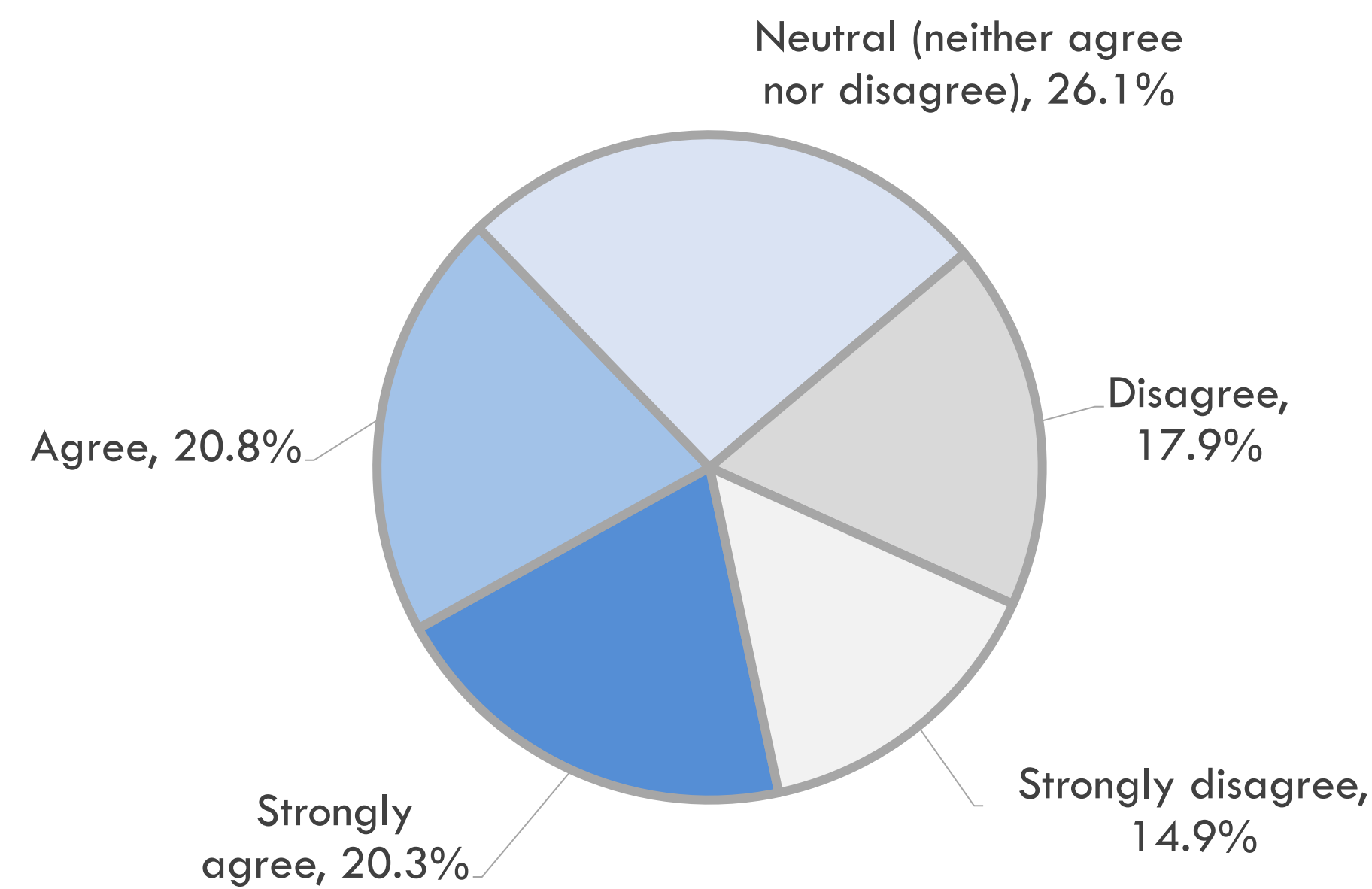**QUESTION:** AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

*(Base: Waves 1-29. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 , 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*

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# WON'T TRAVEL WITHOUT VACCINE

**How much do you agree with the following statement?**

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



Neutral (neither agree nor disagree), 26.1%

Disagree, 17.9%

Strongly disagree, 14.9%

Strongly agree, 20.3%

Agree, 20.8%

*(Base: Waves 6-29. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*

**Historical data**

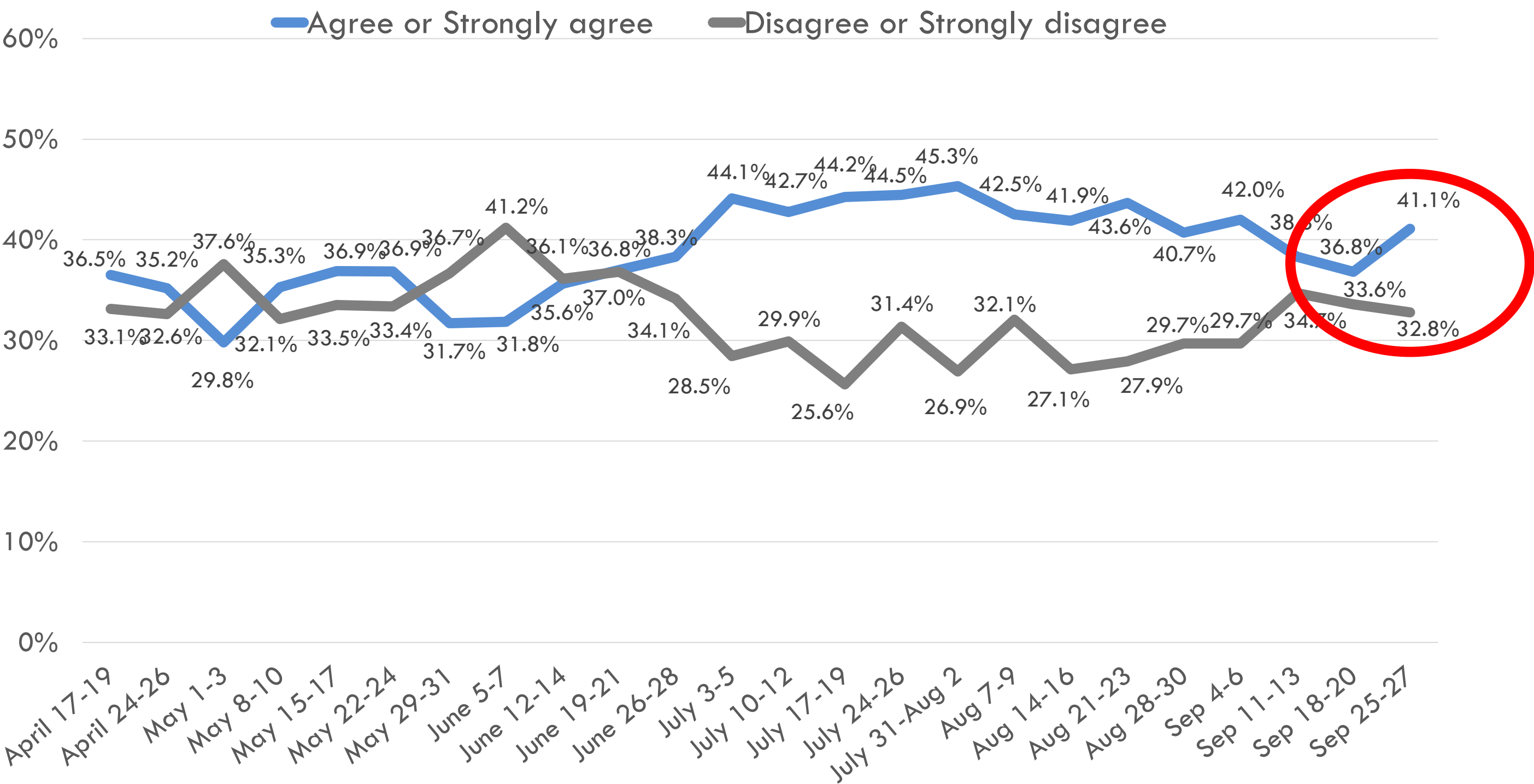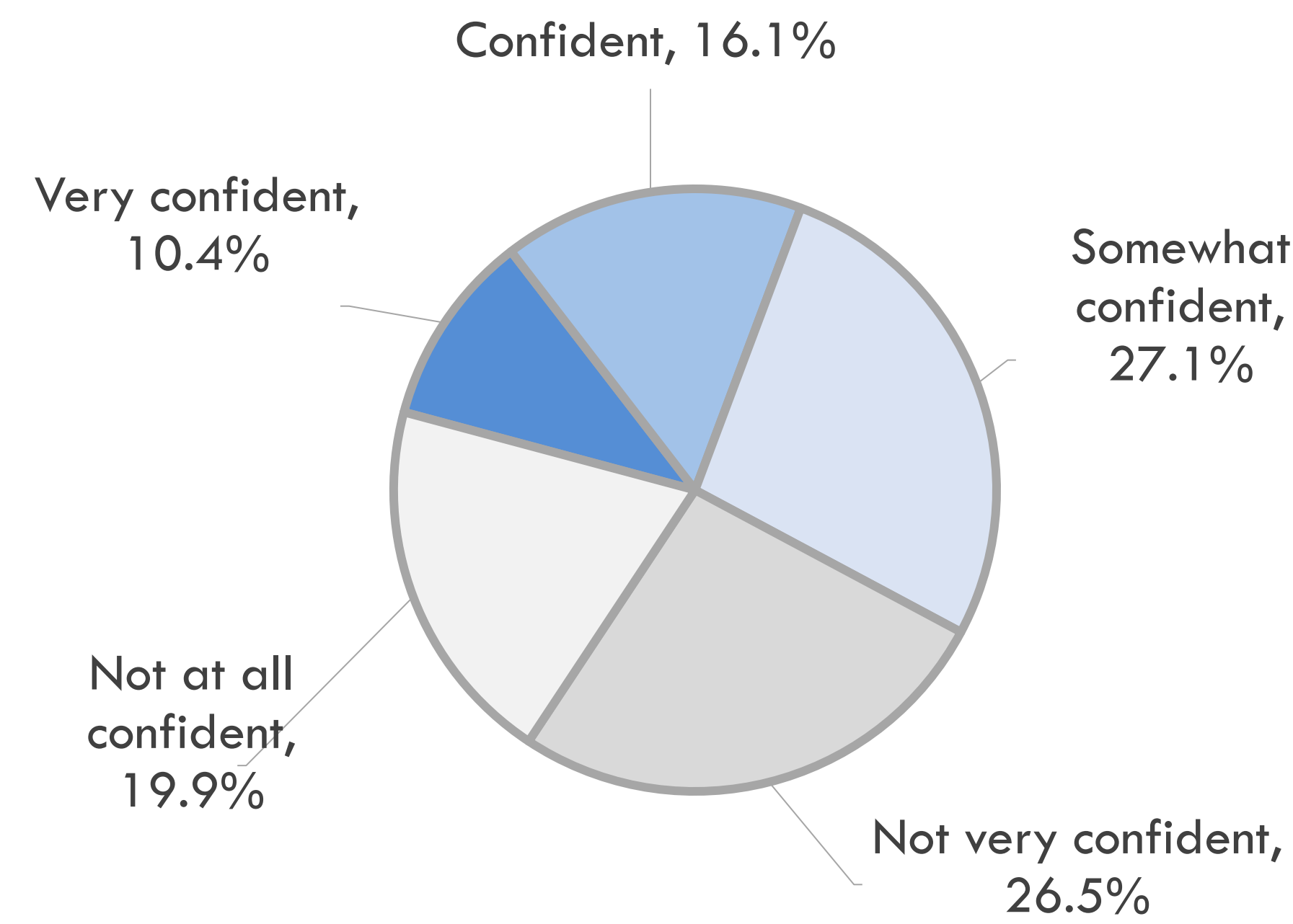— Agree or Strongly agree   — Disagree or Strongly disagree

Agree or Strongly agree: 36.5%, 35.2%, 29.8%, 35.3%, 36.9%, 36.9%, 31.7%, 31.8%, 35.6%, 37.0%, 38.3%, 44.1%, 42.7%, 44.2%, 44.5%, 45.3%, 42.5%, 41.9%, 43.6%, 40.7%, 42.0%, 38.5%, 36.8%, 41.1%

Disagree or Strongly disagree: 33.1%, 32.6%, 37.6%, 32.1%, 33.5%, 33.4%, 36.7%, 41.2%, 36.1%, 36.8%, 34.1%, 28.5%, 29.9%, 25.6%, 31.4%, 26.9%, 32.1%, 27.1%, 27.9%, 29.7%, 29.7%, 34.7%, 33.6%, 32.8%

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, Sep 25-27
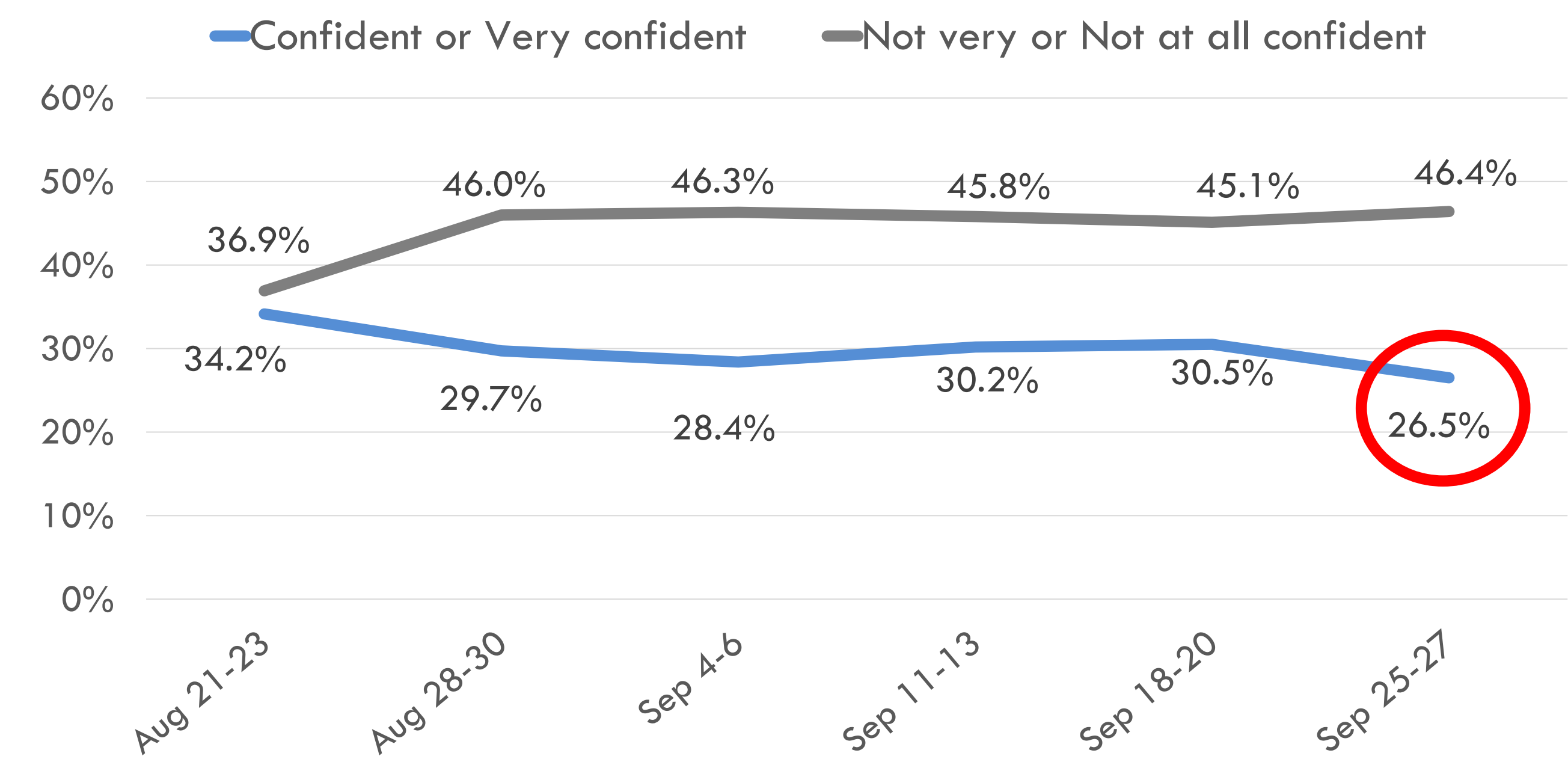
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# CONFIDENCE IN TRAVELING SAFELY

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

Confident, 16.1%

Very confident, 10.4%

Somewhat confident, 27.1%

Not at all confident, 19.9%

Not very confident, 26.5%

*Historical data*

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

| | Aug 21-23 | Aug 28-30 | Sep 4-6 | Sep 11-13 | Sep 18-20 | Sep 25-27 |
|---|---|---|---|---|---|---|
| Not very or Not at all confident | 36.9% | 46.0% | 46.3% | 45.8% | 45.1% | 46.4% |
| Confident or Very confident | 34.2% | 29.7% | 28.4% | 30.2% | 30.5% | 26.5% |

*(Base: Wave 24-29 data. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200 and 1,205 completed surveys.)*
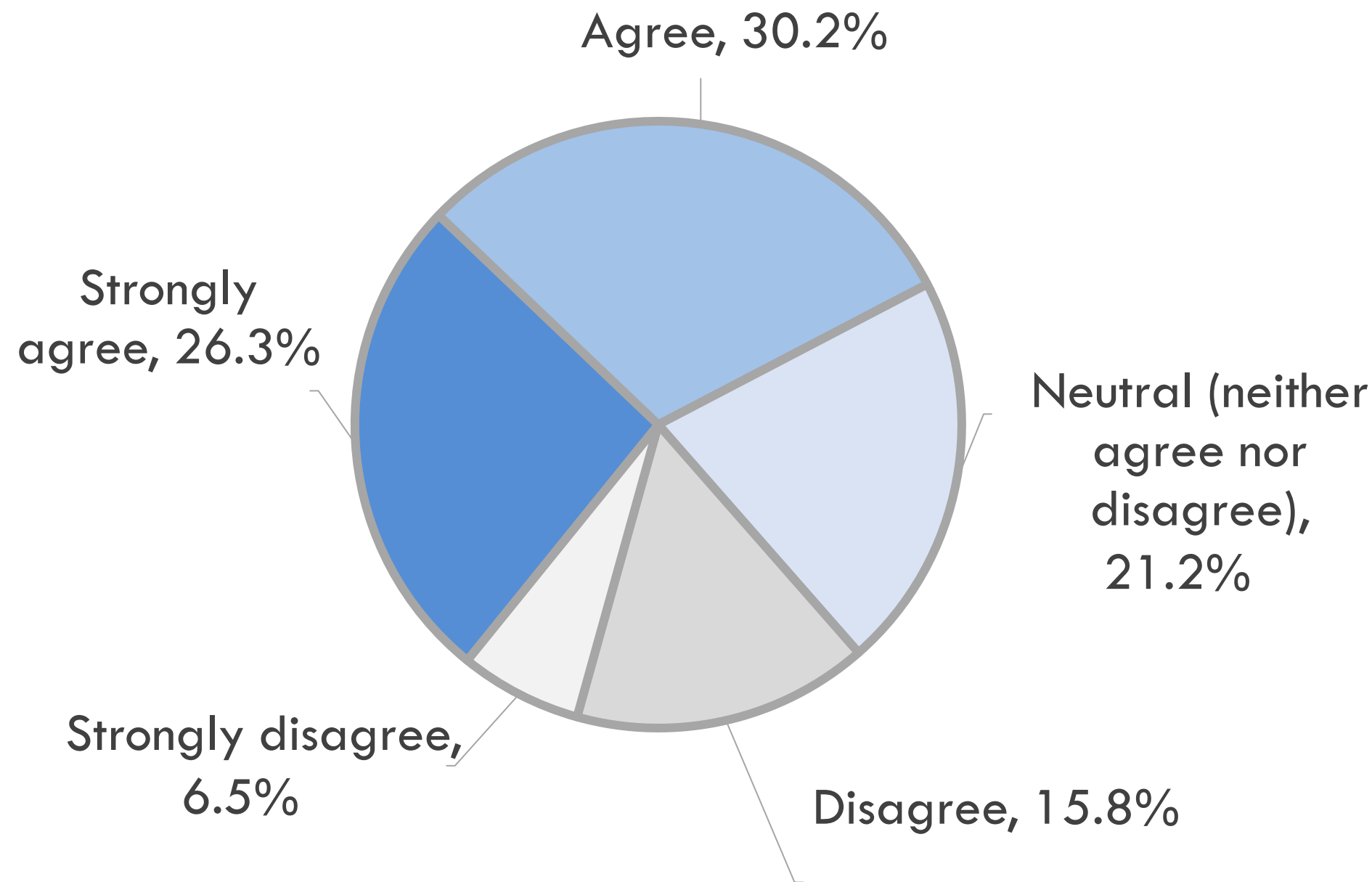
Destination Analysts
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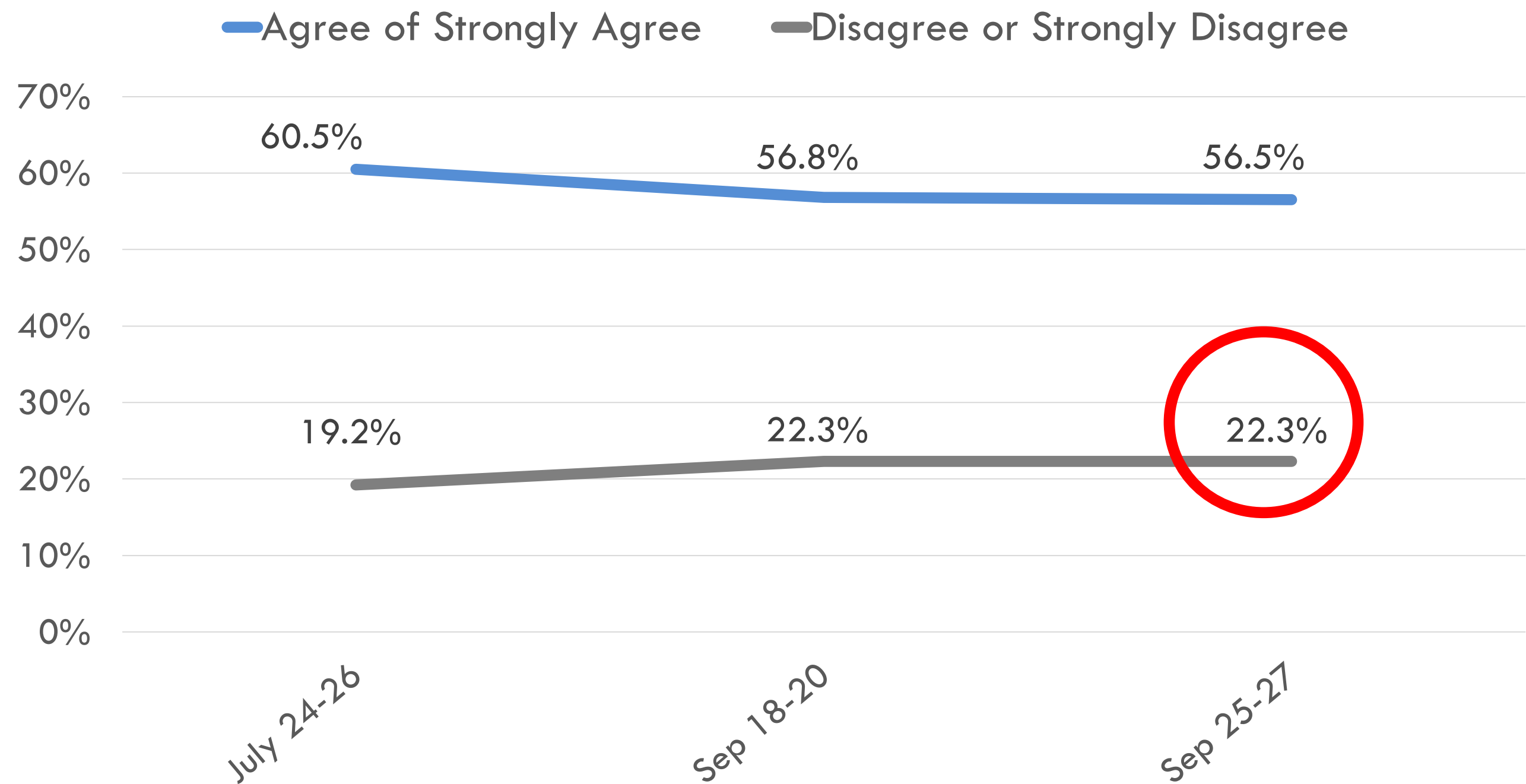
# INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

**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.

Agree, 30.2%

Strongly agree, 26.3%

Neutral (neither agree nor disagree), 21.2%

Strongly disagree, 6.5%

Disagree, 15.8%

*Historical data*

Agree of Strongly Agree — Disagree or Strongly Disagree

| | July 24-26 | Sep 18-20 | Sep 25-27 |
|---|---|---|---|
| Agree or Strongly Agree | 60.5% | 56.8% | 56.5% |
| Disagree or Strongly Disagree | 19.2% | 22.3% | 22.3% |

*(Base: Waves 20, 28 and 29 data. All respondents, 1,206, 1,200 completed surveys.)*

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What's Fall
Travel Looking
Like?

# 64.4%

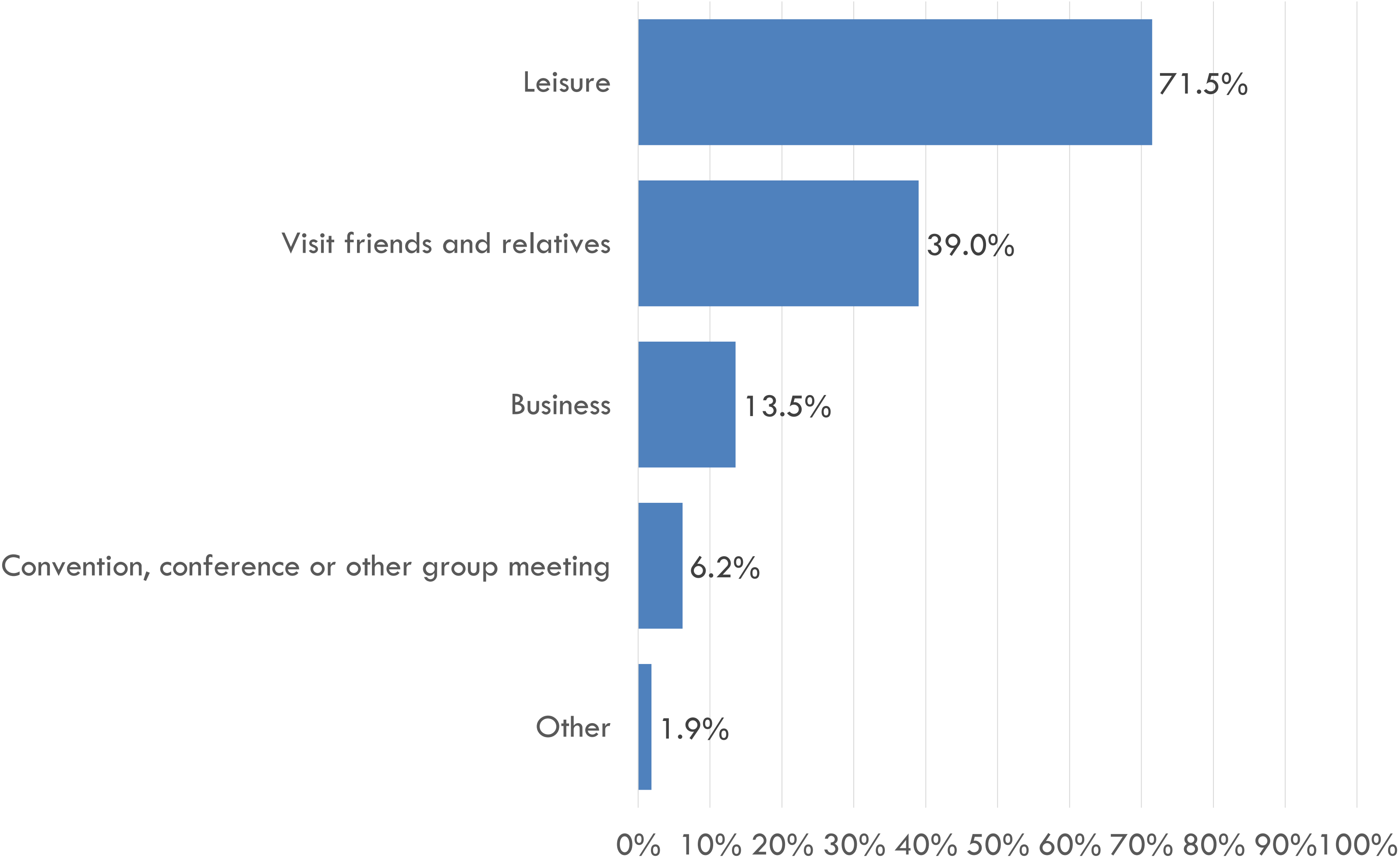(expect to take at least one trip this Fall)

# 1.5 Trips

(on average)

# TYPES OF FALL TRIPS TAKEN

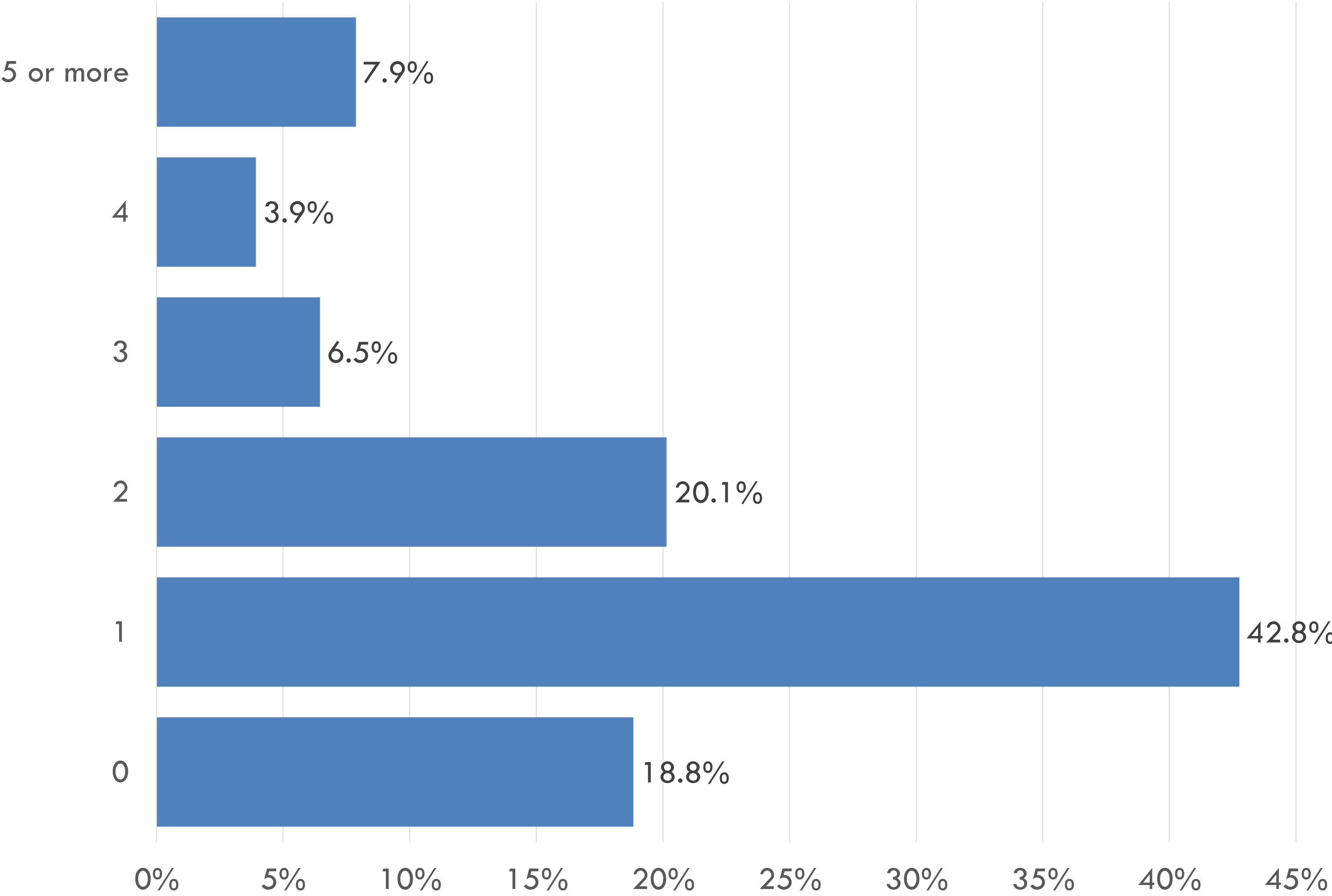**Question:** **Which of the following types of travel are you planning for this Fall?**

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

Leisure — 71.5%

Visit friends and relatives — 39.0%

Business — 13.5%

Convention, conference or other group meeting — 6.2%

Other — 1.9%

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# NUMBER OF REGIONAL FALL TRIPS EXPECTED

**Question:** How many of your Fall trips will be **REGIONAL TRIPS (less than 250 miles at most from your home)?** (Select one)

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

| Category | Percentage |
|----------|-----------|
| 5 or more | 7.9% |
| 4 | 3.9% |
| 3 | 6.5% |
| 2 | 20.1% |
| 1 | 42.8% |
| 0 | 18.8% |

Destination Analysts
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# NUMBER OF REGIONAL FALL TRIPS EXPECTED

**Question:** How many of your Fall trips will be REGIONAL TRIPS (less than 250 miles at most from your home)? (Select one)
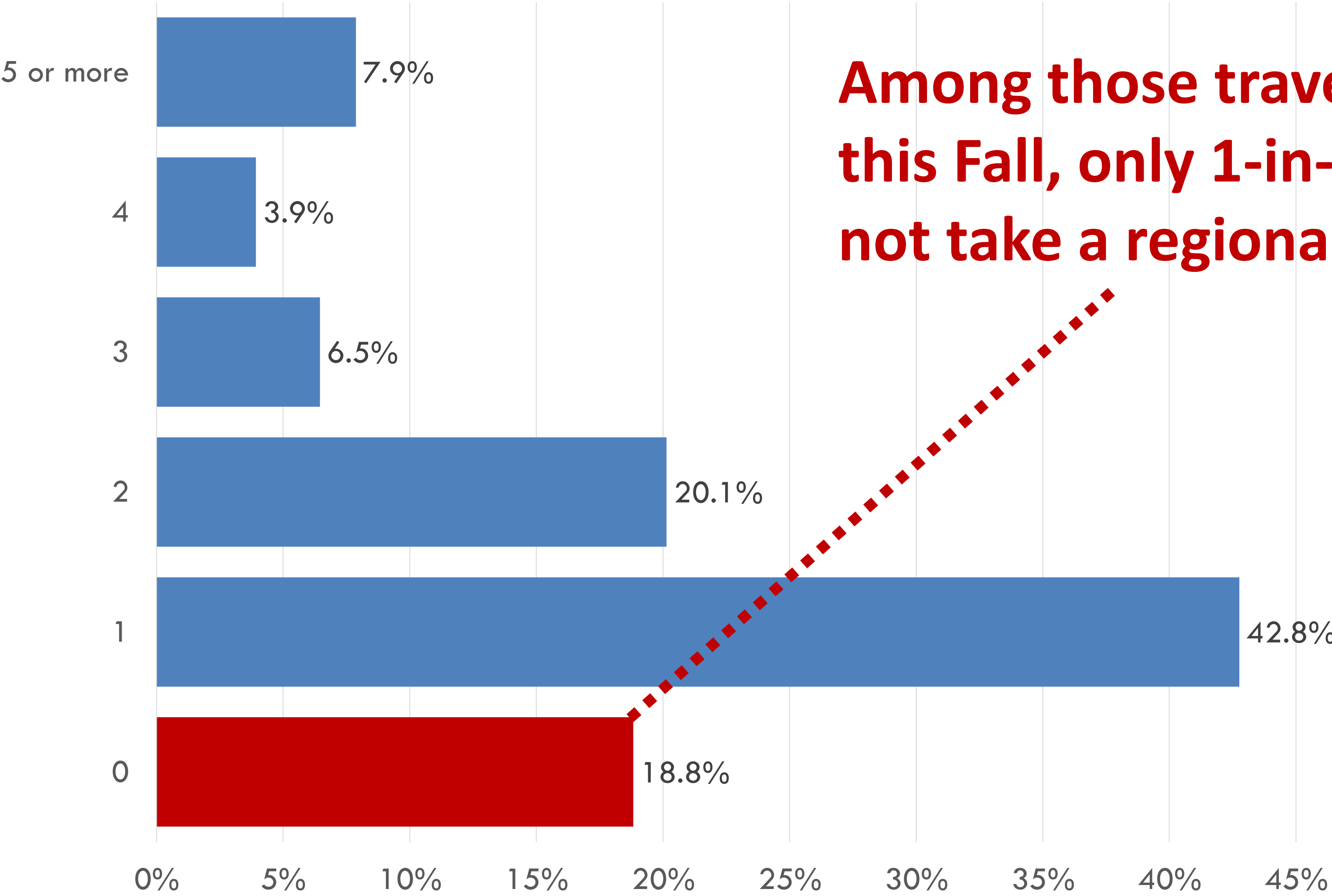
*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



**Among those traveling this Fall, only 1-in-5 will not take a regional trip**

| Category | Percentage |
|---|---|
| 5 or more | 7.9% |
| 4 | 3.9% |
| 3 | 6.5% |
| 2 | 20.1% |
| 1 | 42.8% |
| 0 | 18.8% |

Destination Analysts
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# NUMBER OF OVERNIGHT TRIPS THIS FALL

**Question:** How many of your Fall trips will be OVERNIGHT TRIPS (at least one night away from home)? (Select one)

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



| Number | Percentage |
|--------|-----------|
| 5 or more | 7.5% |
| 4 | 2.4% |
| 3 | 7.5% |
| 2 | 23.1% |
| 1 | 43.6% |
| 0 | 15.8% |
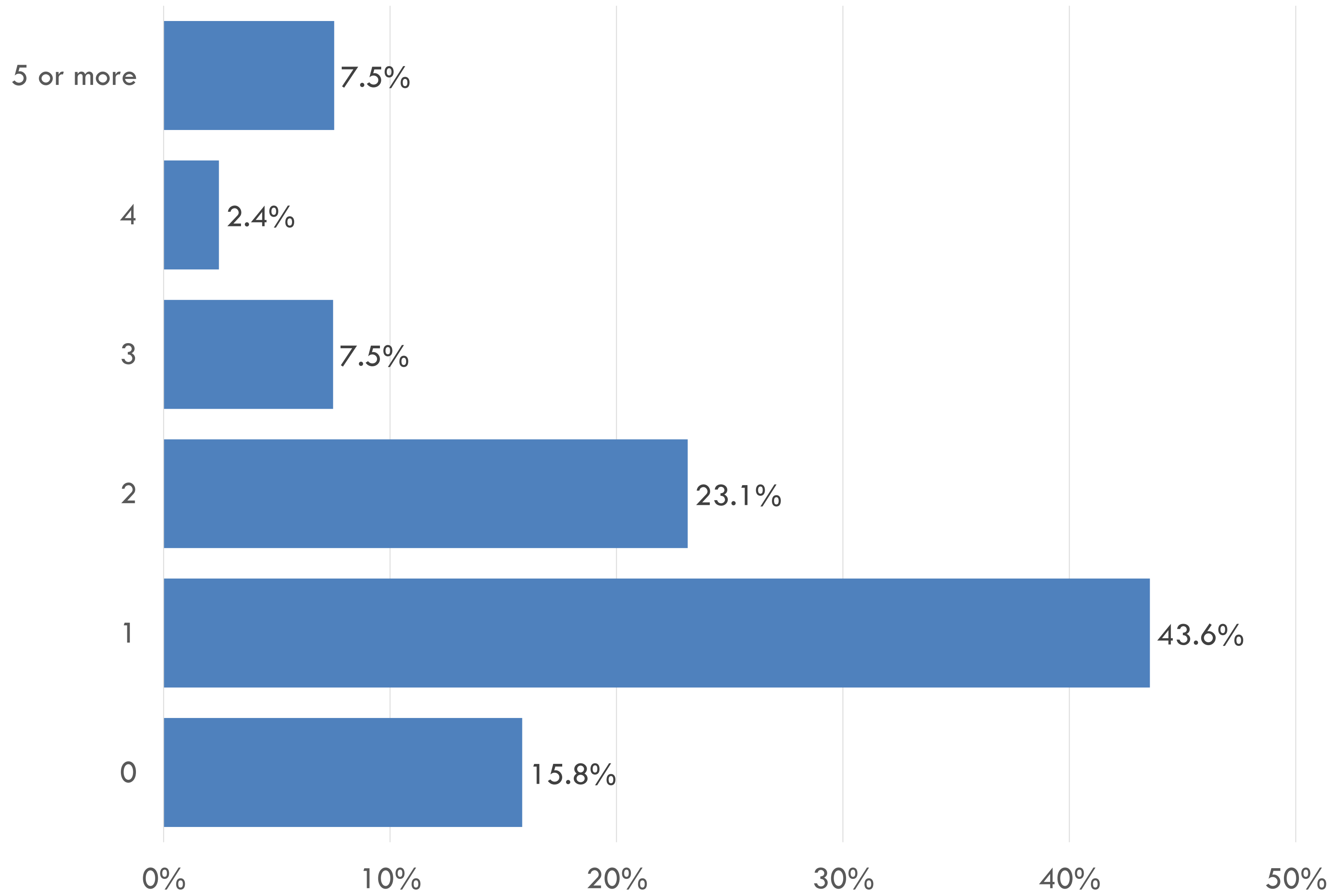
# NUMBER OF OVERNIGHT TRIPS THIS FALL

**Question:** How many of your Fall trips will be OVERNIGHT TRIPS (at least one night away from home)? (Select one)
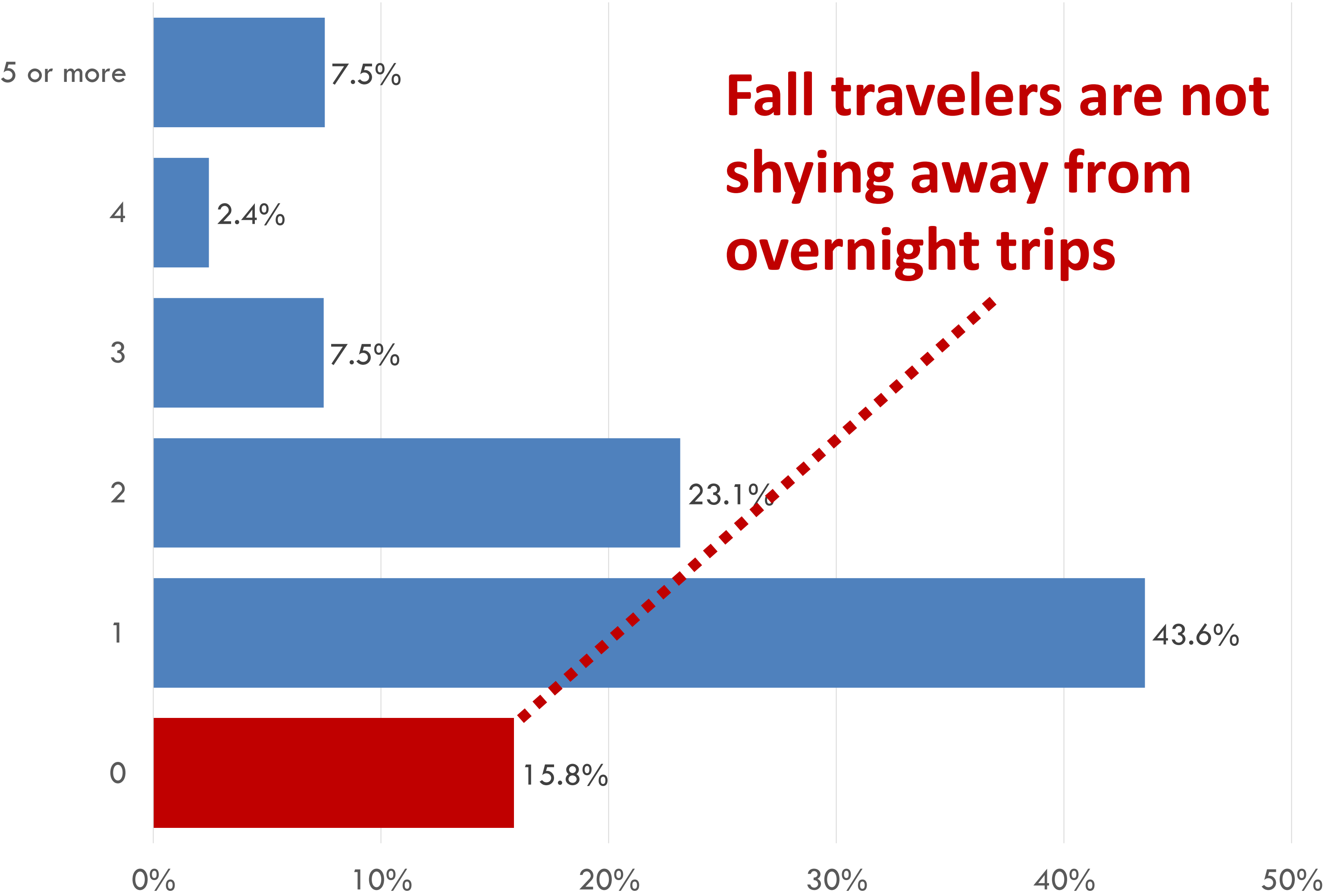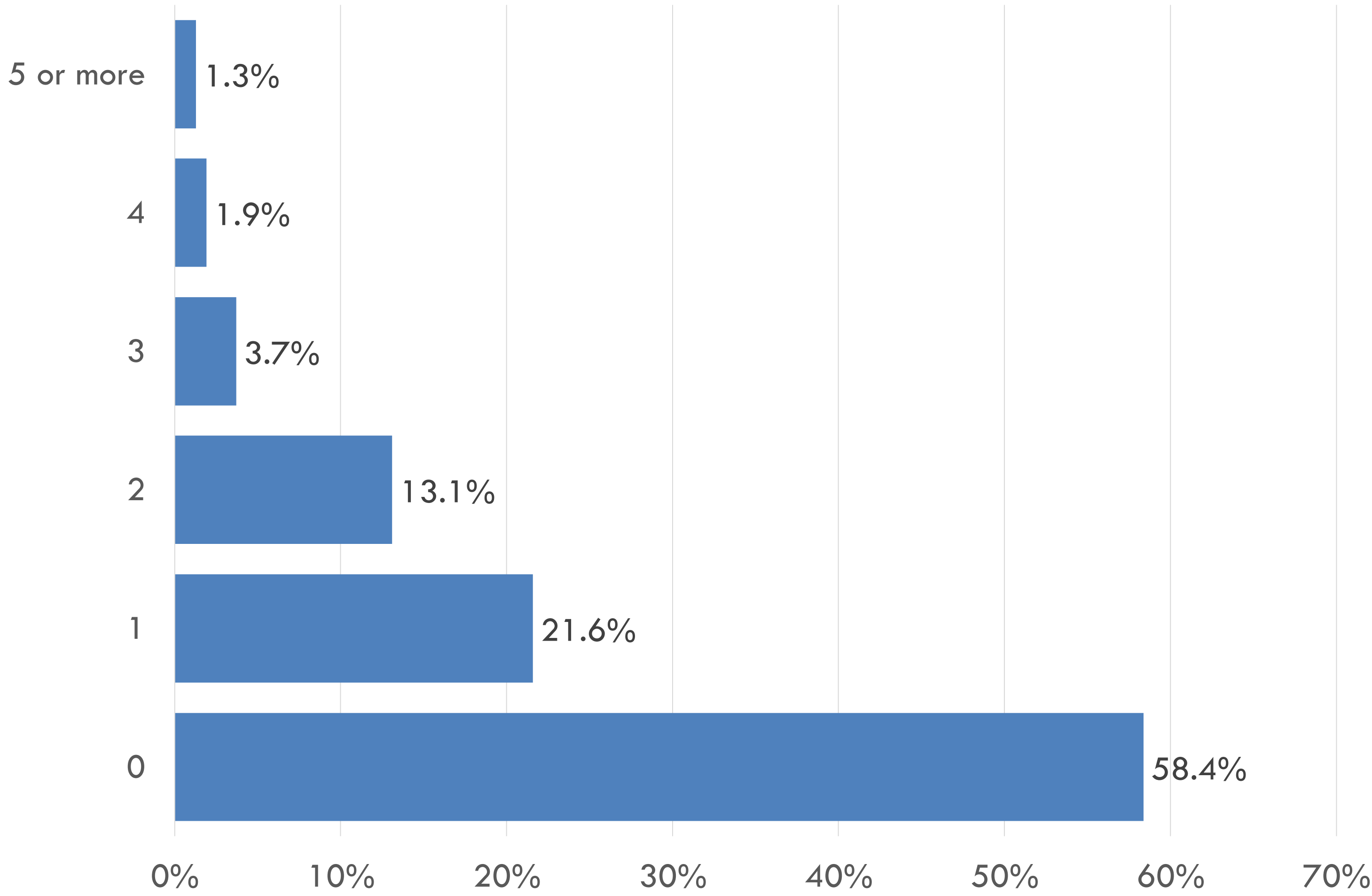
*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

**Fall travelers are not shying away from overnight trips**

| Category | Value |
|---|---|
| 5 or more | 7.5% |
| 4 | 2.4% |
| 3 | 7.5% |
| 2 | 23.1% |
| 1 | 43.6% |
| 0 | 15.8% |

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# FALL TRIPS WITH CHILDREN

**Question:** On how many of your Fall trips will you be TRAVELING WITH YOUR OWN CHILDREN?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



5 or more — 1.3%
4 — 1.9%
3 — 3.7%
2 — 13.1%
1 — 21.6%
0 — 58.4%

# FALL TRIPS WITH CHILDREN

**Question:** On how many of your Fall trips will you be TRAVELING WITH YOUR OWN CHILDREN?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*
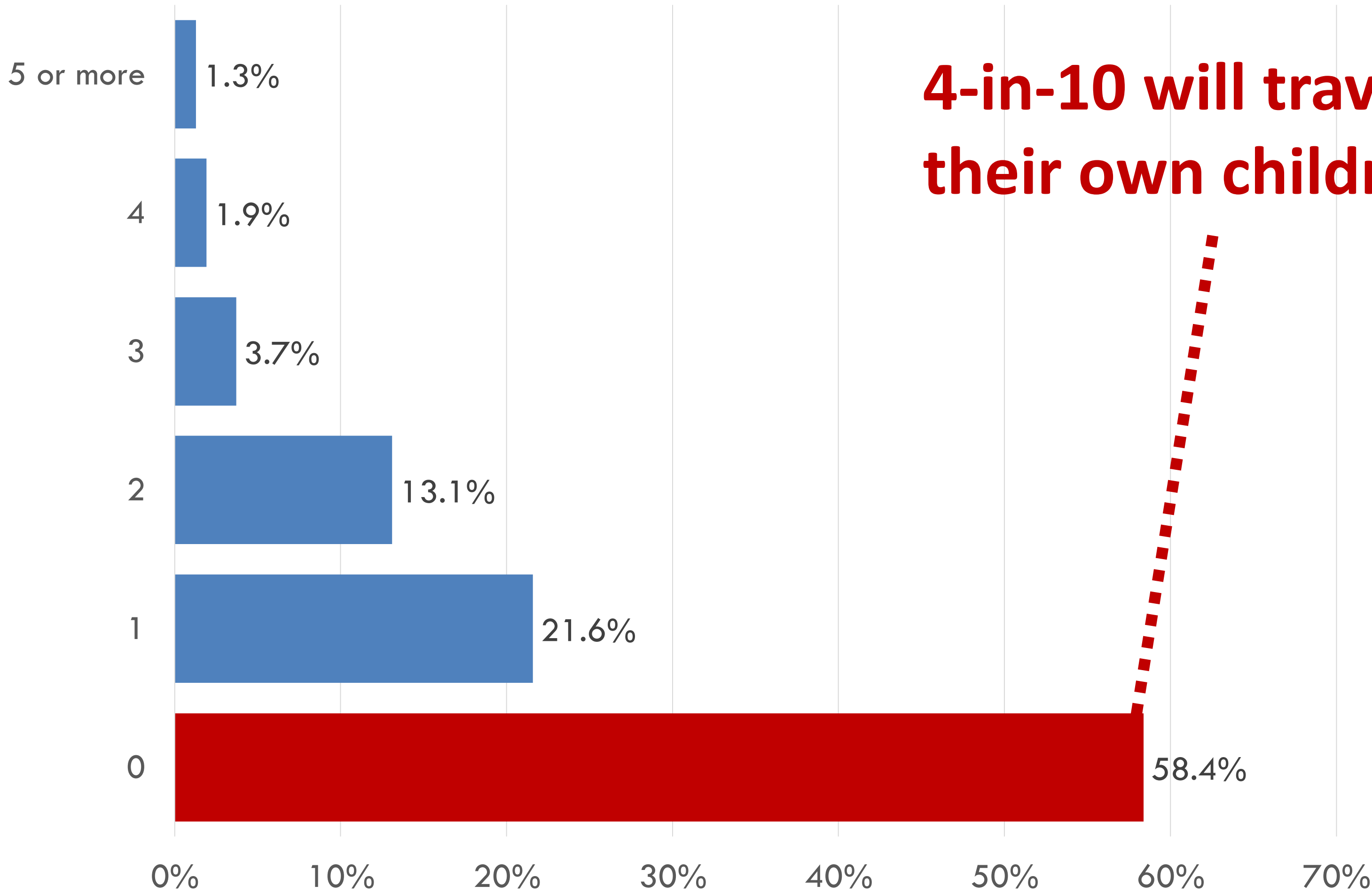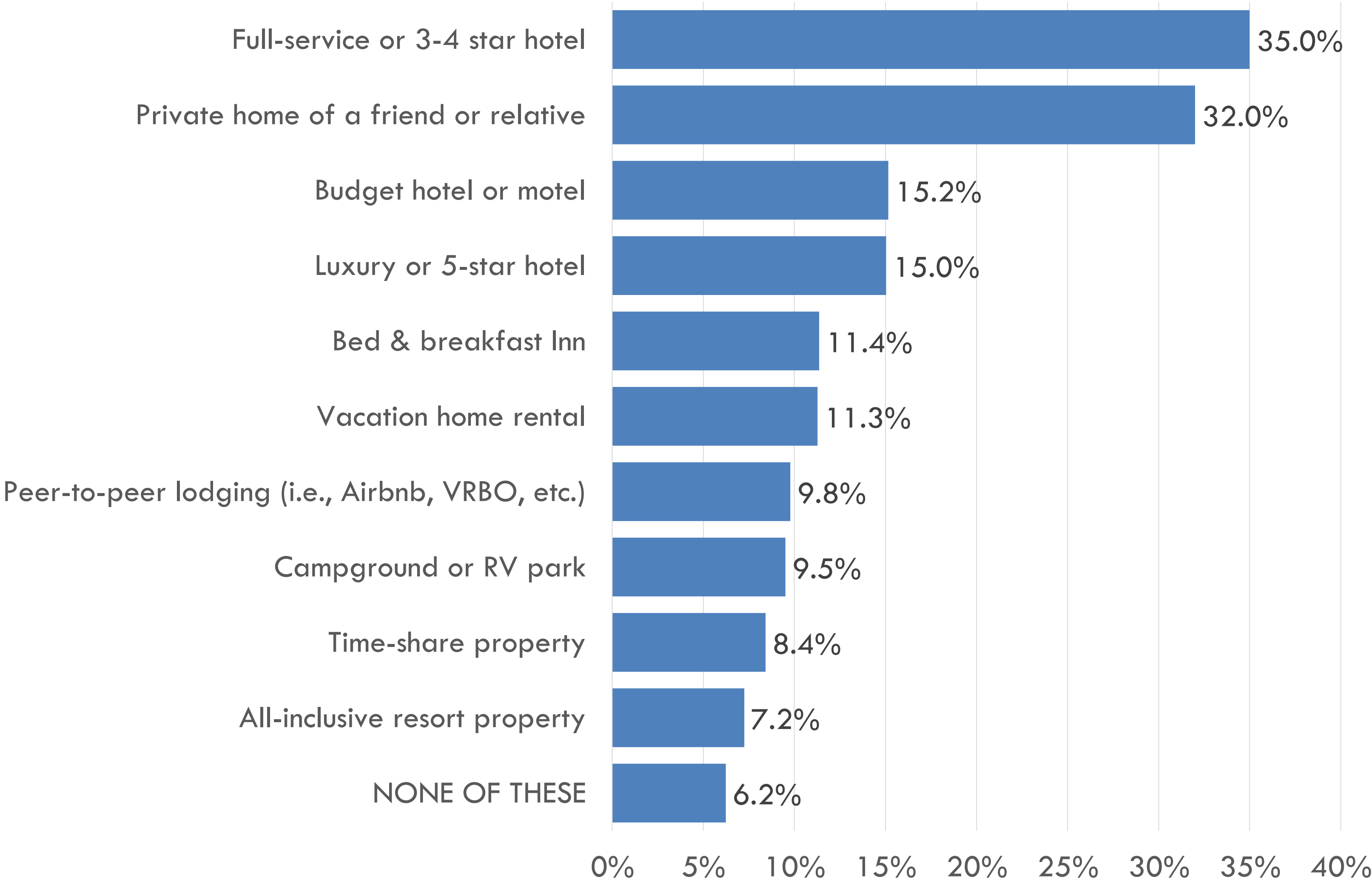
## 4-in-10 will travel with their own children

| Category | Percentage |
|----------|-----------|
| 5 or more | 1.3% |
| 4 | 1.9% |
| 3 | 3.7% |
| 2 | 13.1% |
| 1 | 21.6% |
| 0 | 58.4% |

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# LODGING USED ON FALL TRIPS

**Question:** In which of the following will you stay overnight at during any of your Fall trip(s)? (Select all that apply)
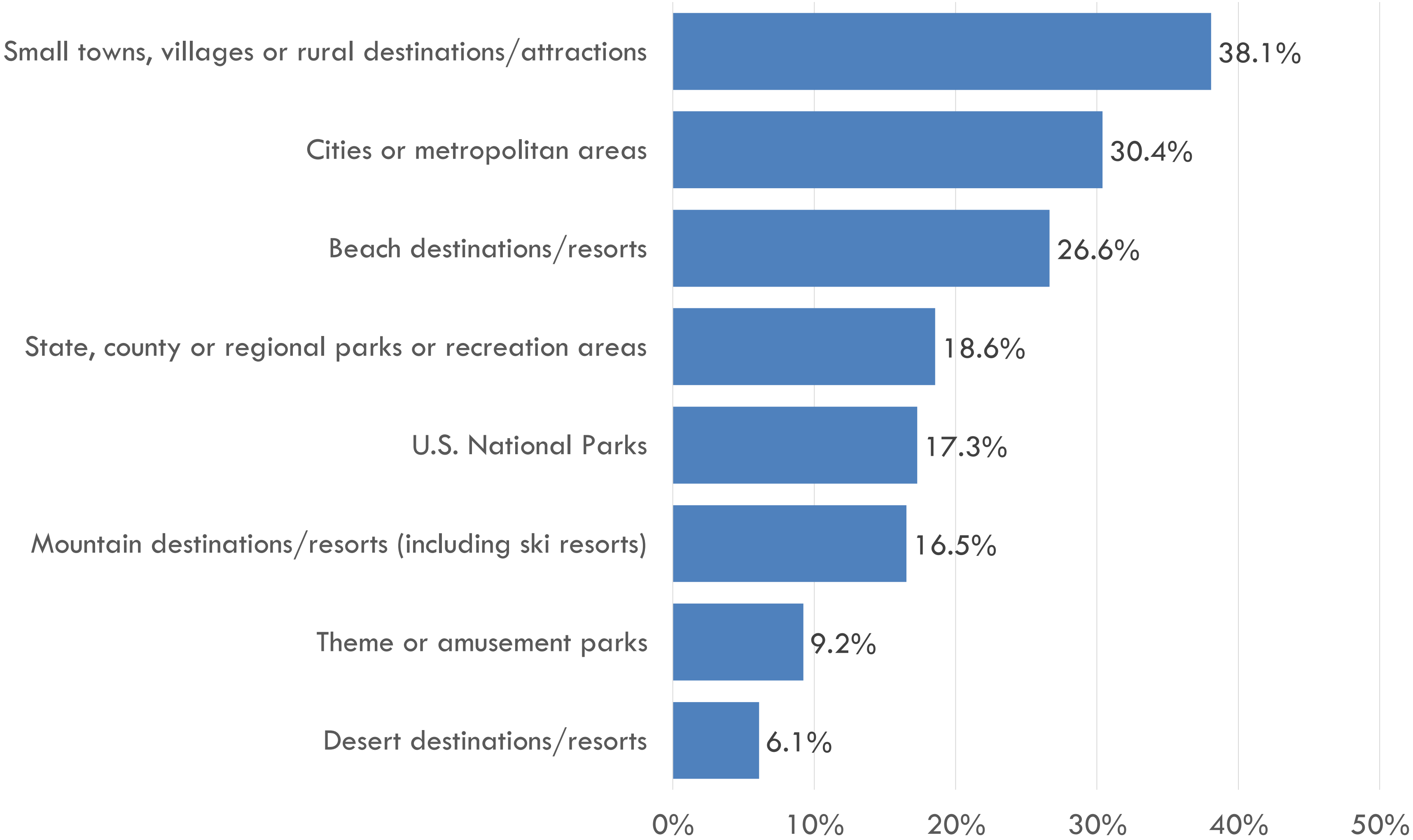
*(Base: Wave 29 data. Fall over-night traveling respondents, 627 completed surveys. Data collected Sep 25-27, 2020)*



| Lodging type | % |
|---|---|
| Full-service or 3-4 star hotel | 35.0% |
| Private home of a friend or relative | 32.0% |
| Budget hotel or motel | 15.2% |
| Luxury or 5-star hotel | 15.0% |
| Bed & breakfast Inn | 11.4% |
| Vacation home rental | 11.3% |
| Peer-to-peer lodging (i.e., Airbnb, VRBO, etc.) | 9.8% |
| Campground or RV park | 9.5% |
| Time-share property | 8.4% |
| All-inclusive resort property | 7.2% |
| NONE OF THESE | 6.2% |

# DESTINATION TYPES ON FALL TRIPS

**Question:** **Thinking about where you are currently considering/planning to visit, which types of destinations are you considering? (Select all that apply)**
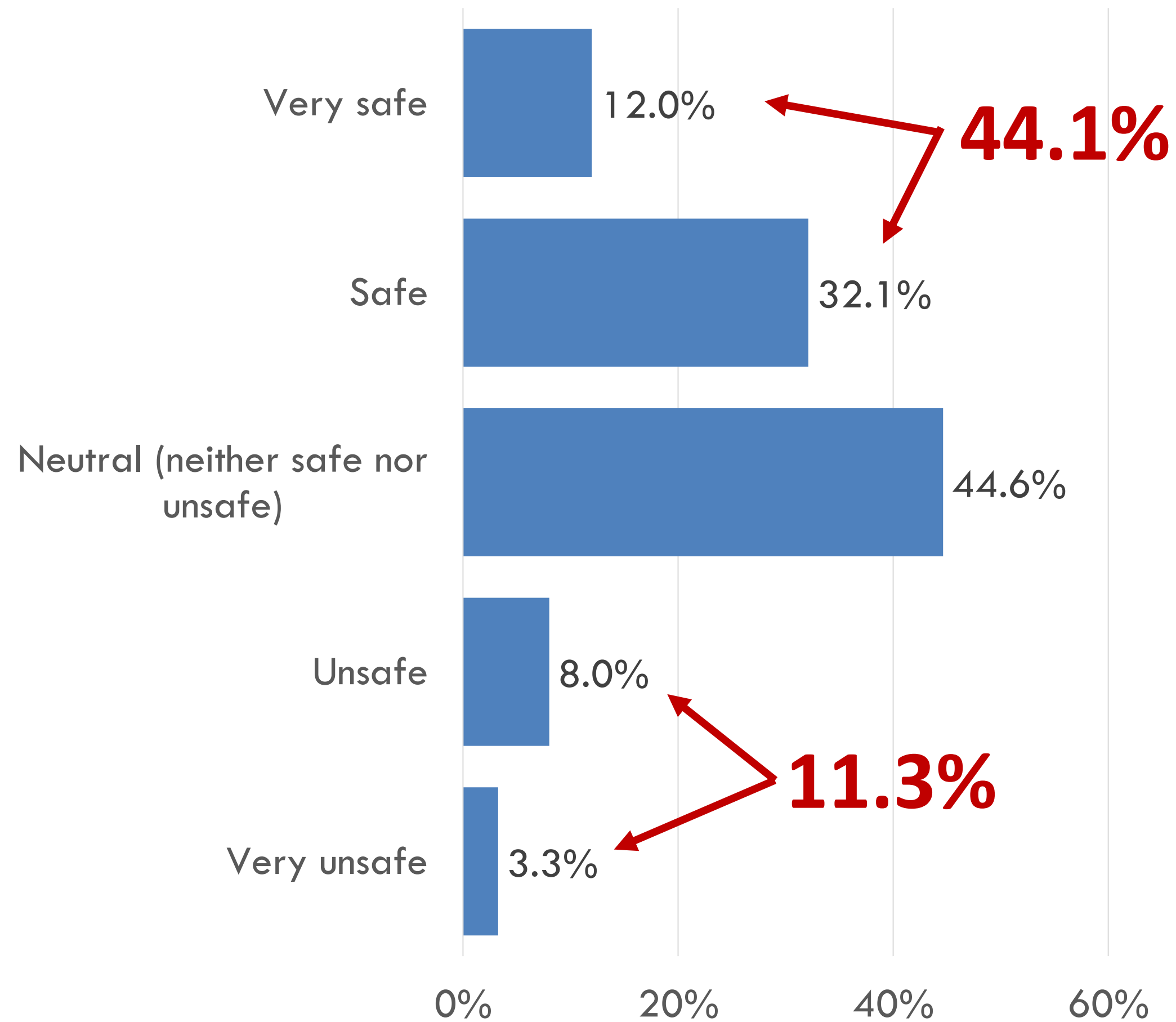
*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



Small towns, villages or rural destinations/attractions — 38.1%
Cities or metropolitan areas — 30.4%
Beach destinations/resorts — 26.6%
State, county or regional parks or recreation areas — 18.6%
U.S. National Parks — 17.3%
Mountain destinations/resorts (including ski resorts) — 16.5%
Theme or amusement parks — 9.2%
Desert destinations/resorts — 6.1%

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Thinking about the Coronavirus situation, in general how safe do you feel it is to visit cities or metropolitan areas?

# FALL URBAN TRAVELERS

| | |
|---|---|
| Very safe | 12.0% |
| Safe | 32.1% |
| Neutral (neither safe nor unsafe) | 44.6% |
| Unsafe | 8.0% |
| Very unsafe | 3.3% |

**44.1%**

**11.3%**

# FALL NON-URBAN TRAVELERS
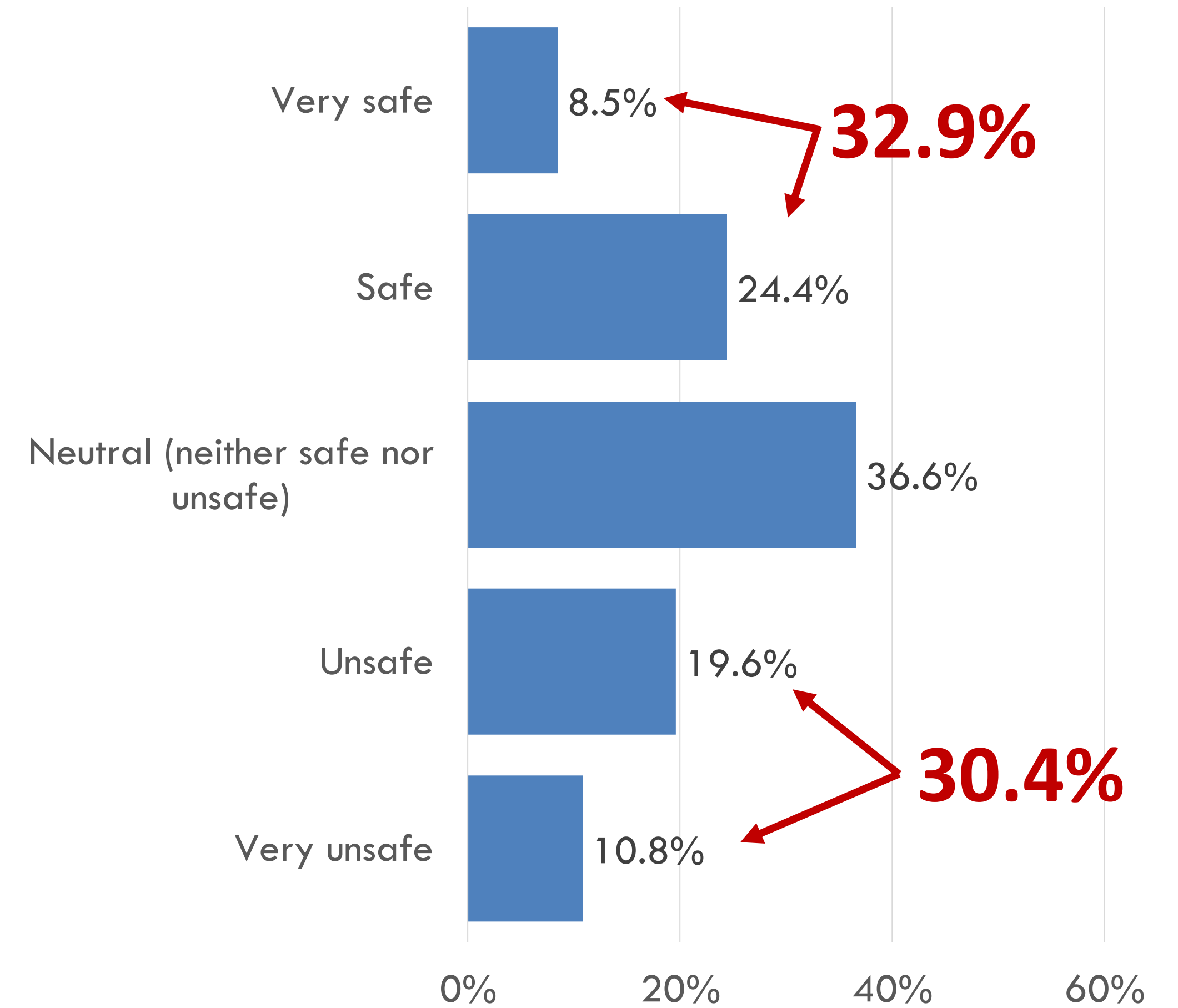
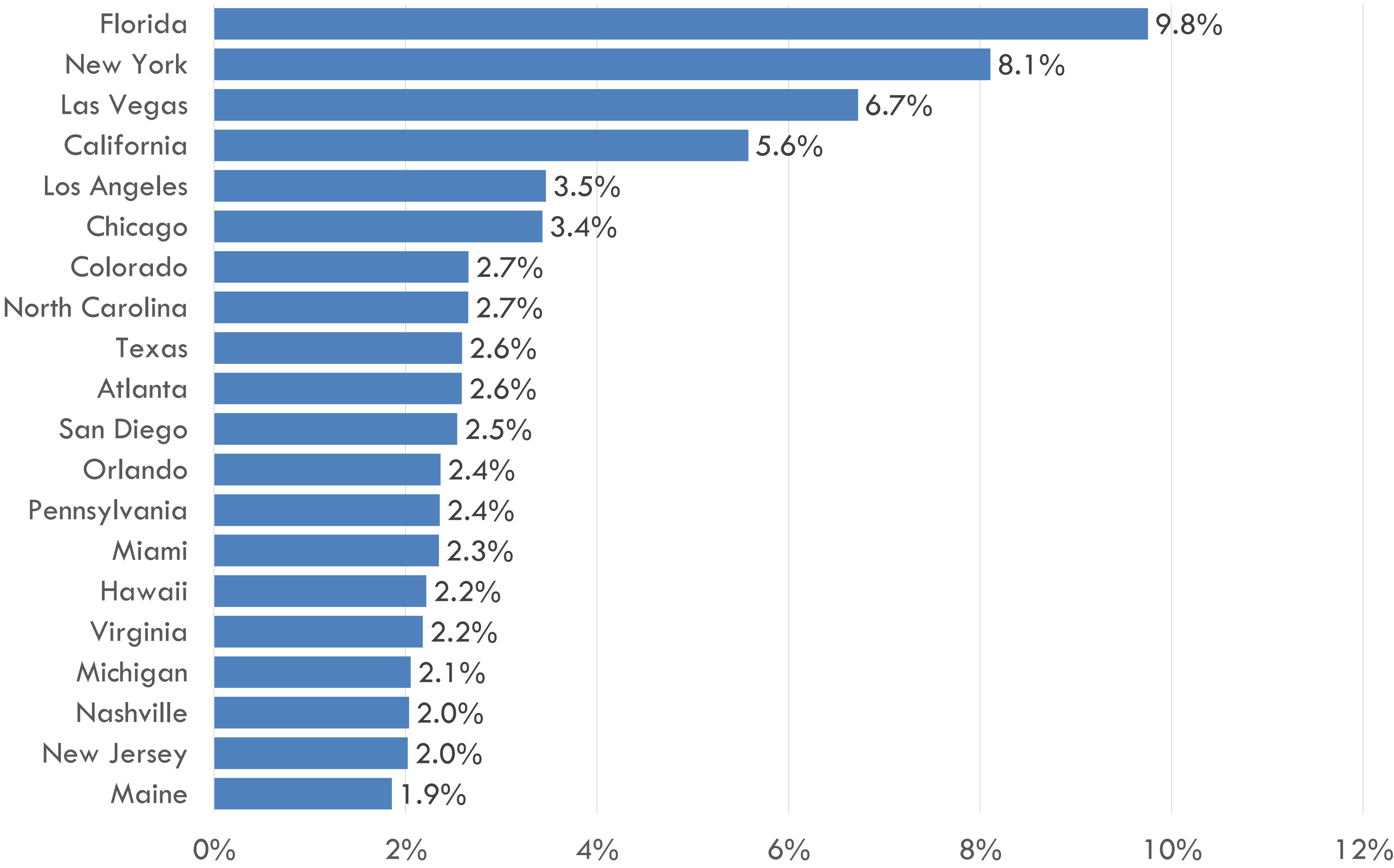| | |
|---|---|
| Very safe | 8.5% |
| Safe | 24.4% |
| Neutral (neither safe nor unsafe) | 36.6% |
| Unsafe | 19.6% |
| Very unsafe | 10.8% |

**32.9%**

**30.4%**

Thinking about the Coronavirus situation, in general how safe do you feel it is to visit cities or metropolitan areas?

# DOMESTIC DESTINATIONS THIS FALL

**Question:** Which domestic destinations (if any) are you planning to visit or considering visiting this Fall? (Write in up to your top 3)

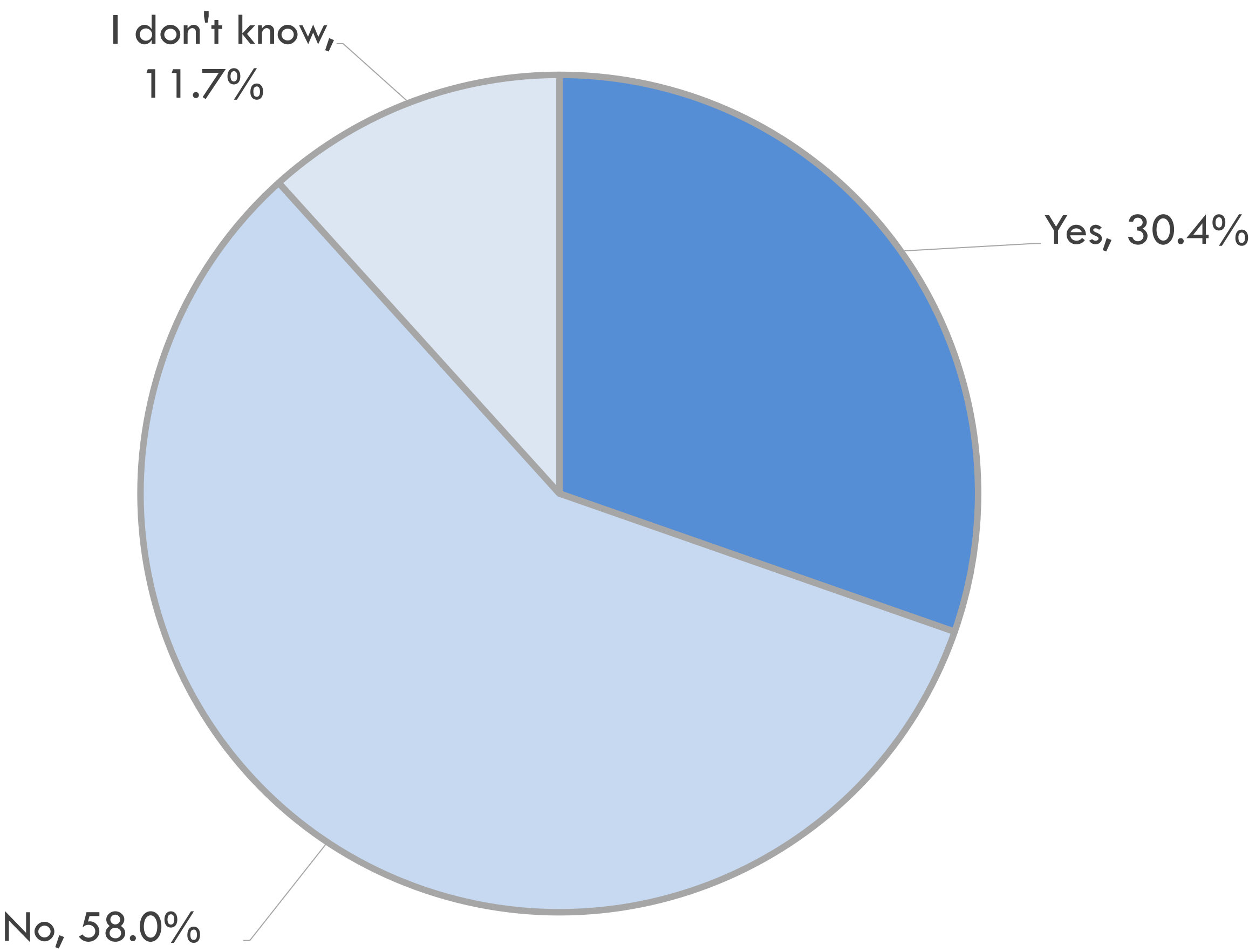**Please only consider destination in the United States for your answers.**

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

| Destination | Percentage |
|---|---|
| Florida | 9.8% |
| New York | 8.1% |
| Las Vegas | 6.7% |
| California | 5.6% |
| Los Angeles | 3.5% |
| Chicago | 3.4% |
| Colorado | 2.7% |
| North Carolina | 2.7% |
| Texas | 2.6% |
| Atlanta | 2.6% |
| San Diego | 2.5% |
| Orlando | 2.4% |
| Pennsylvania | 2.4% |
| Miami | 2.3% |
| Hawaii | 2.2% |
| Virginia | 2.2% |
| Michigan | 2.1% |
| Nashville | 2.0% |
| New Jersey | 2.0% |
| Maine | 1.9% |

# CHANGES IN FALL DESTINATION TYPES DUE TO PANDEMIC

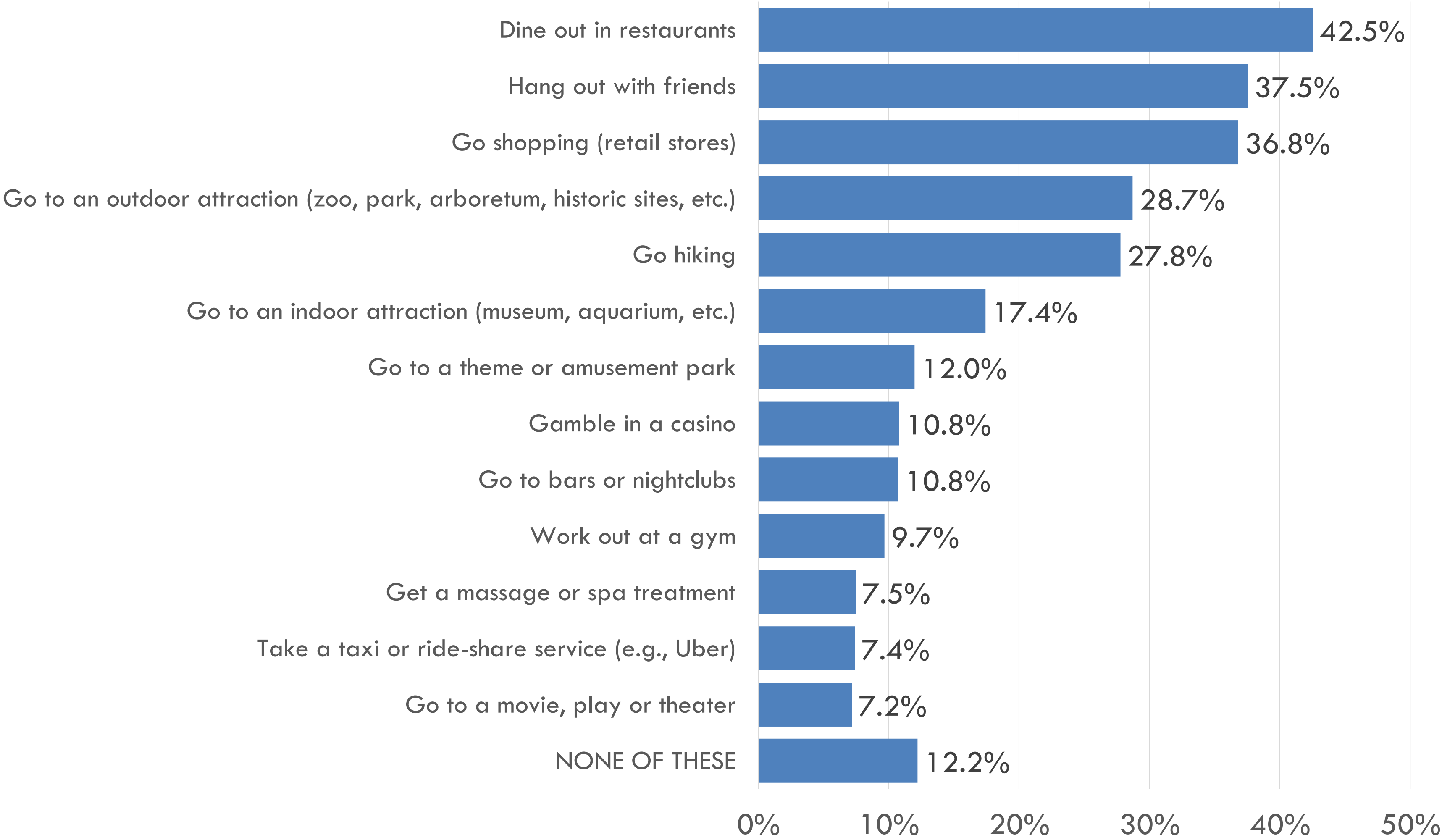**Question:** Has the Coronavirus situation changed the destinations you are likely to visit this Fall?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



I don't know, 11.7%

Yes, 30.4%

No, 58.0%

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# FALL TRAVEL ACTIVITIES

**Question:** Which of the following are you likely to do while traveling this Fall? (Select all that apply)

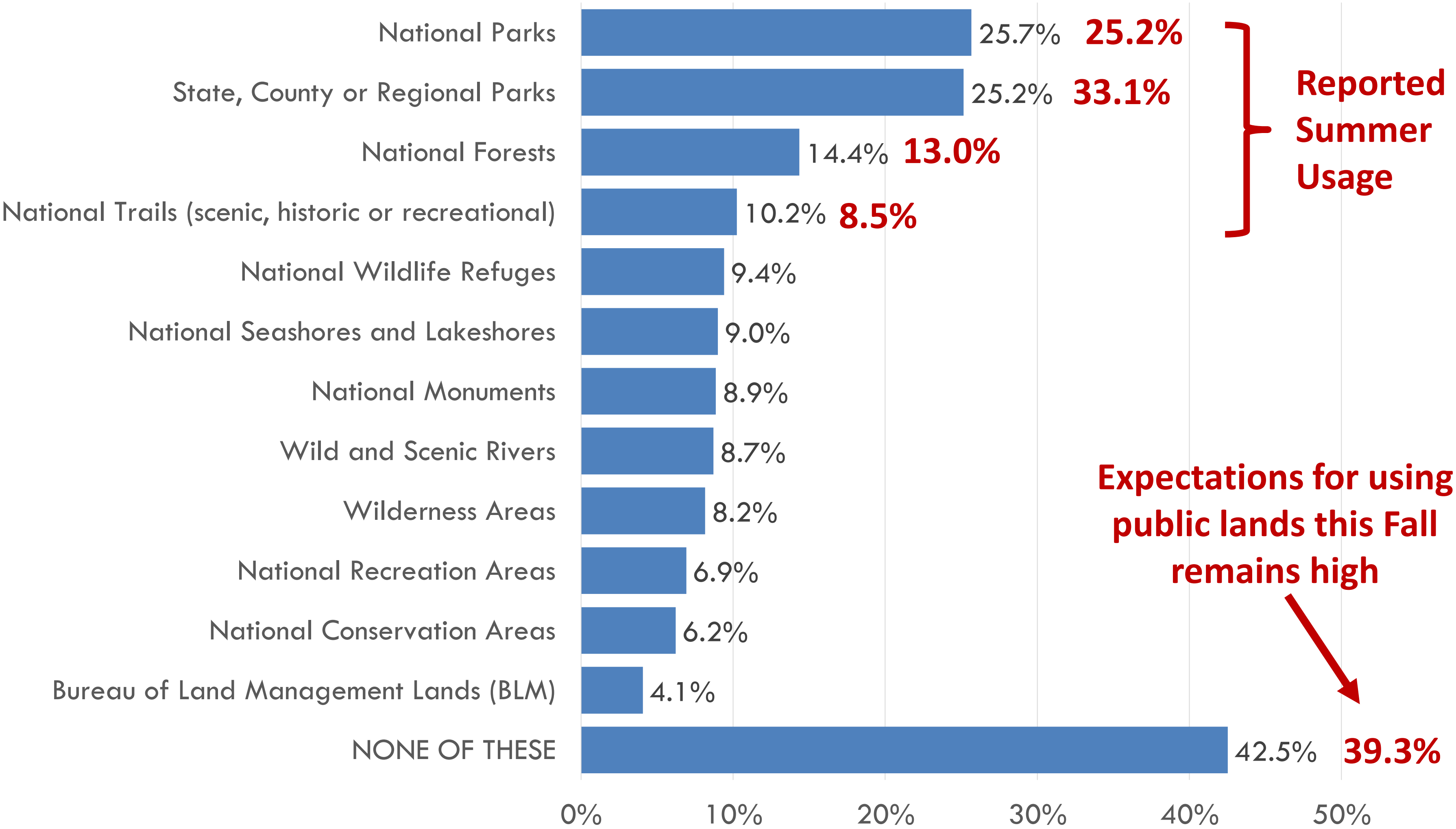*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

| Activity | Percentage |
|---|---|
| Dine out in restaurants | 42.5% |
| Hang out with friends | 37.5% |
| Go shopping (retail stores) | 36.8% |
| Go to an outdoor attraction (zoo, park, arboretum, historic sites, etc.) | 28.7% |
| Go hiking | 27.8% |
| Go to an indoor attraction (museum, aquarium, etc.) | 17.4% |
| Go to a theme or amusement park | 12.0% |
| Gamble in a casino | 10.8% |
| Go to bars or nightclubs | 10.8% |
| Work out at a gym | 9.7% |
| Get a massage or spa treatment | 7.5% |
| Take a taxi or ride-share service (e.g., Uber) | 7.4% |
| Go to a movie, play or theater | 7.2% |
| NONE OF THESE | 12.2% |

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# PUBLIC LANDS AND FALL TRAVEL

**Question:** On any of your Fall trips will you visit any of the following types of public lands? (Select all that apply)
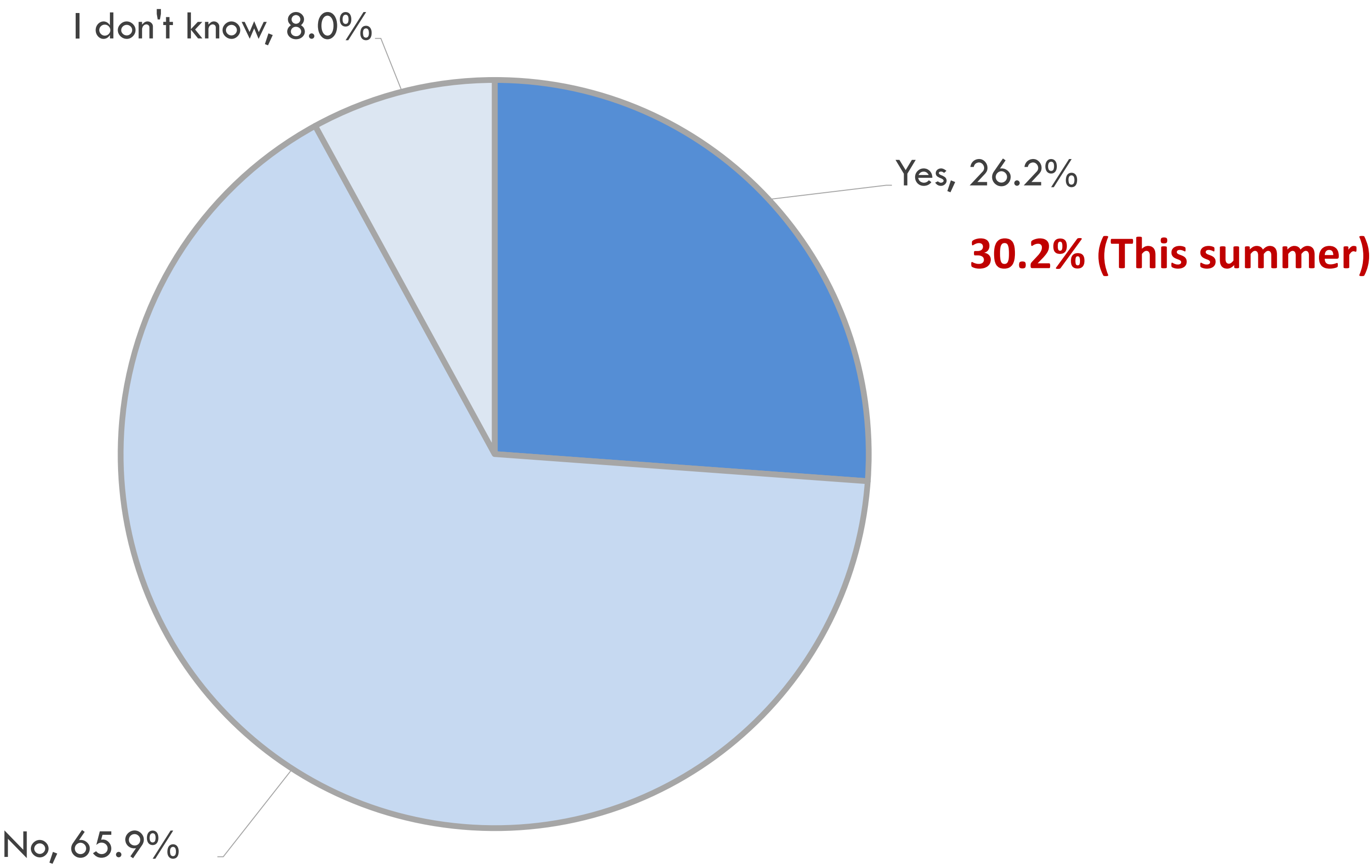
*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



| Category | Fall % | Summer % |
|---|---|---|
| National Parks | 25.7% | **25.2%** |
| State, County or Regional Parks | 25.2% | **33.1%** |
| National Forests | 14.4% | **13.0%** |
| National Trails (scenic, historic or recreational) | 10.2% | **8.5%** |
| National Wildlife Refuges | 9.4% | |
| National Seashores and Lakeshores | 9.0% | |
| National Monuments | 8.9% | |
| Wild and Scenic Rivers | 8.7% | |
| Wilderness Areas | 8.2% | |
| National Recreation Areas | 6.9% | |
| National Conservation Areas | 6.2% | |
| Bureau of Land Management Lands (BLM) | 4.1% | |
| NONE OF THESE | 42.5% | **39.3%** |

**Reported Summer Usage**

**Expectations for using public lands this Fall remains high**

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# USE OF COMMERCIAL AIRLINES THIS FALL

**Question:** On any Fall trip(s), will you travel on a commercial airline?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

I don't know, 8.0%

Yes, 26.2%

**30.2% (This summer)**

No, 65.9%

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# REASONS FOR FALL TRAVEL

**Question:** Tell us about your motivations for traveling this Fall. Please evaluate the importance of each.]

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

**Top 2 Box Score: Important of Very Important**

| Reason | Score |
|---|---|
| Relax or de-stress | 84.4% |
| Spend time with my family | 81.9% |
| Escape - Get away from it all | 78.0% |
| Visit family or friends who live in other places | 73.3% |
| Enjoy the outdoors/connect with nature | 67.2% |
| Have new experiences | 61.3% |
| Engage in a specific activity or hobby | 55.8% |
| Use up vacation days | 41.1% |
| Check destination(s) off my bucket list | 36.5% |
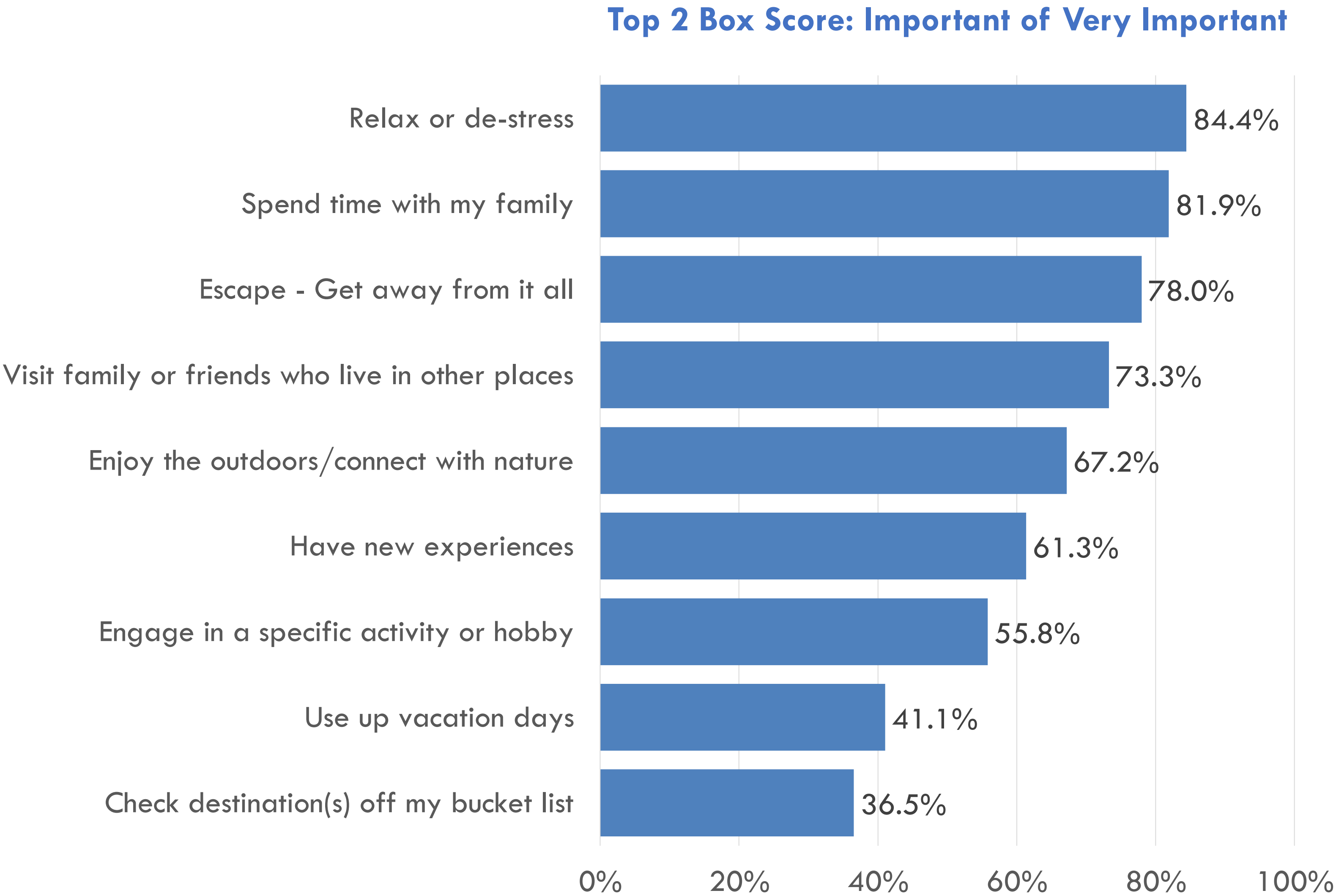
# TRAVEL BUDGET THIS FALL

**Question:** Continuing to think about your travel(s) this Fall. Compared to before the Coronavirus situation, how budget conscious will you be while traveling this Fall?

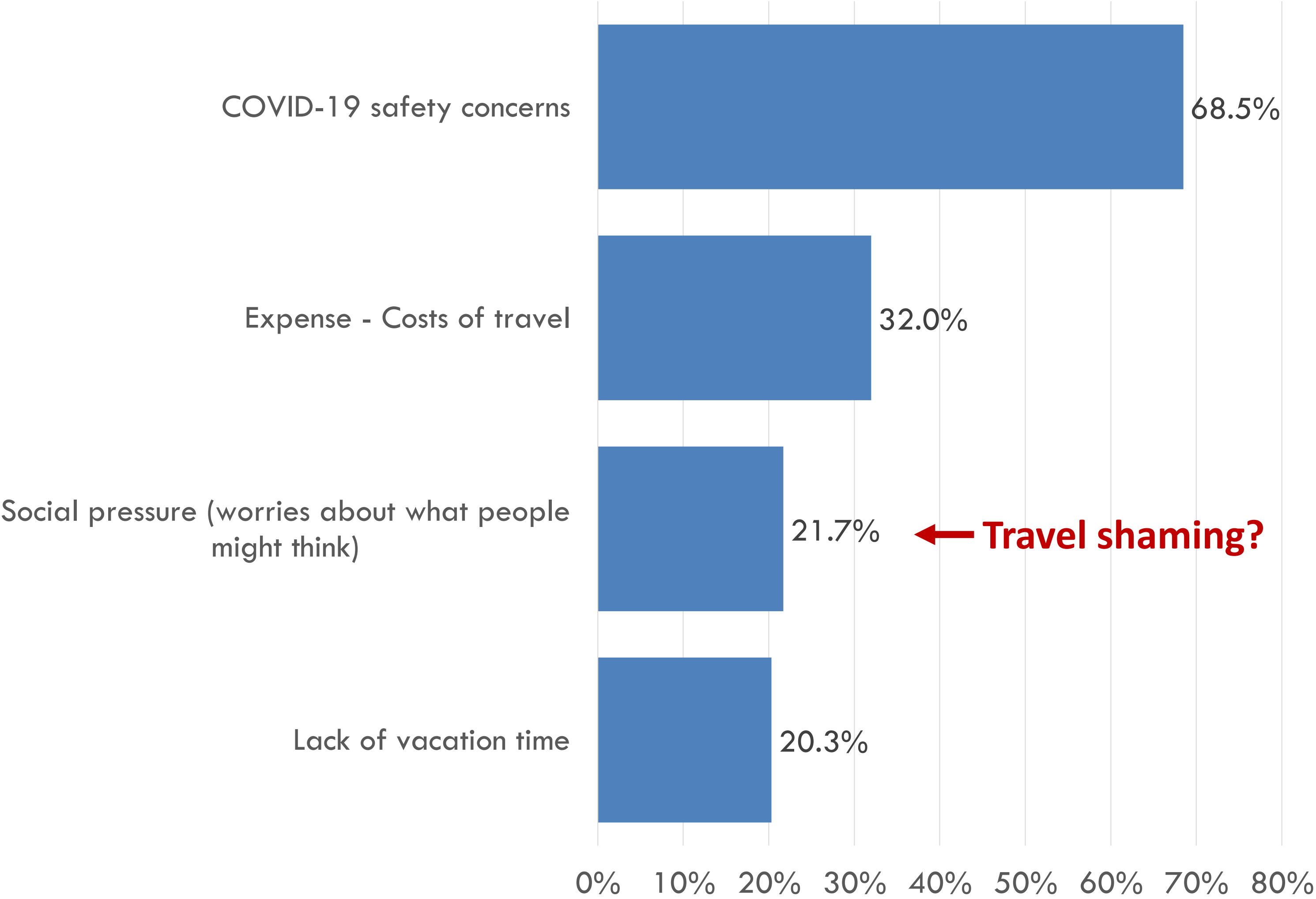**This Fall while traveling I will be**

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



Much more budget conscious — 16.7%
More budget conscious — 25.2%
Neither more nor less budget conscious — 47.0%
Less budget conscious — 6.0%
Much less budget conscious — 1.8%
I don't know — 3.3%

**41.9%**
(Was 42.3% in summer)

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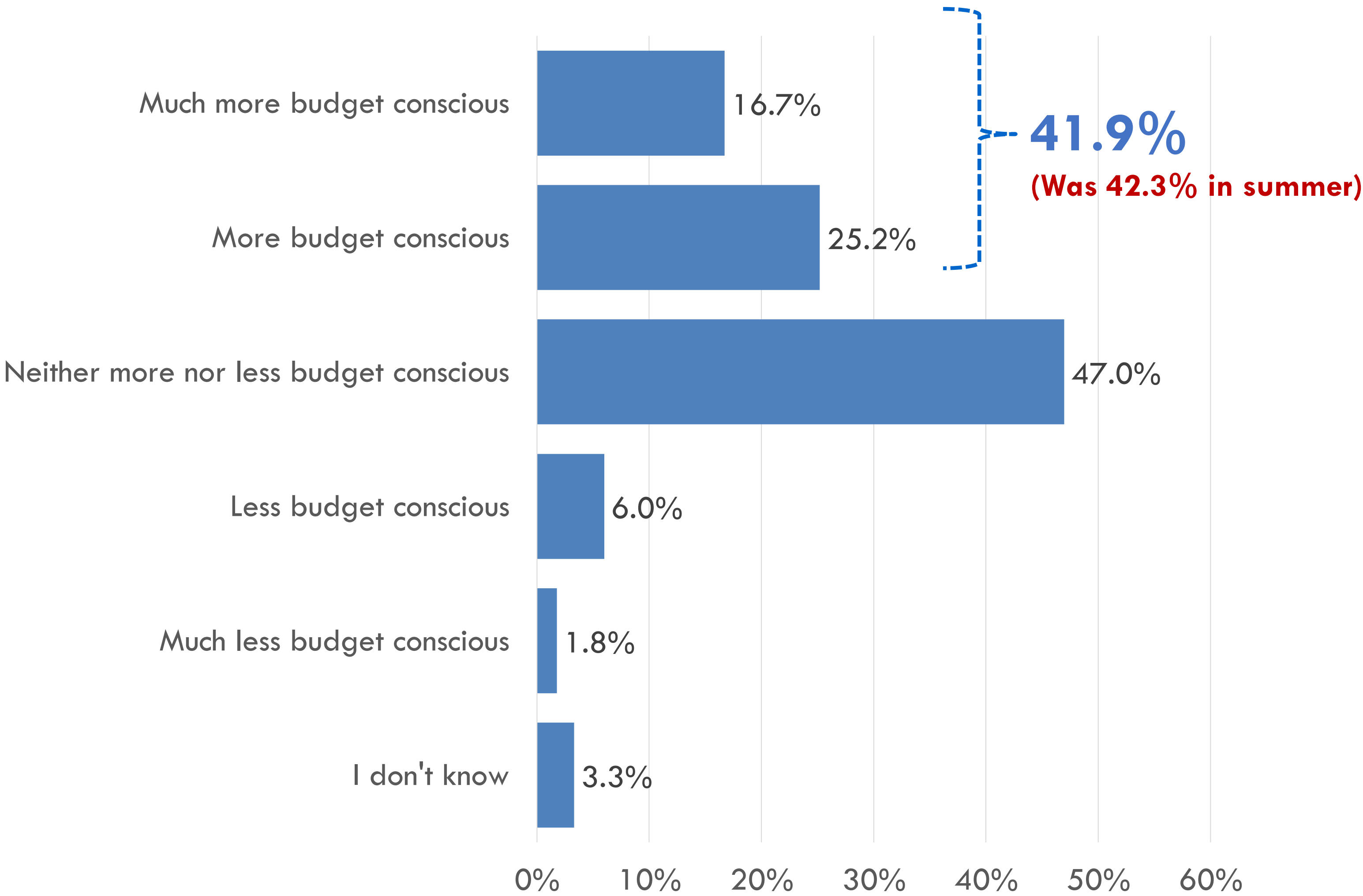
# IMPEDIMENTS TO FALL TRAVEL

**Question:** Have any of the following kept you from planning any Fall travel beyond what you have described above?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*

COVID-19 safety concerns — 68.5%

Expense - Costs of travel — 32.0%

Social pressure (worries about what people might think) — 21.7% ← **Travel shaming?**

Lack of vacation time — 20.3%

0%  10%  20%  30%  40%  50%  60%  70%  80%

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# OPENNESS TO NEW FALL DESTINATIONS

**Question:** If a good opportunity presented itself, how likely would you be to take a leisure trip this Fall THAT YOU HAVEN'T ALREADY CONSIDERED?

*(Base: Wave 29 data. Fall traveling respondents, 745 completed surveys. Data collected Sep 25-27, 2020)*



Very likely — 17.5%

Likely — 31.4%

Neutral (neither likely nor unlikely) — 32.6%

Unlikely — 11.0%

Very unlikely — 7.4%

48.9%

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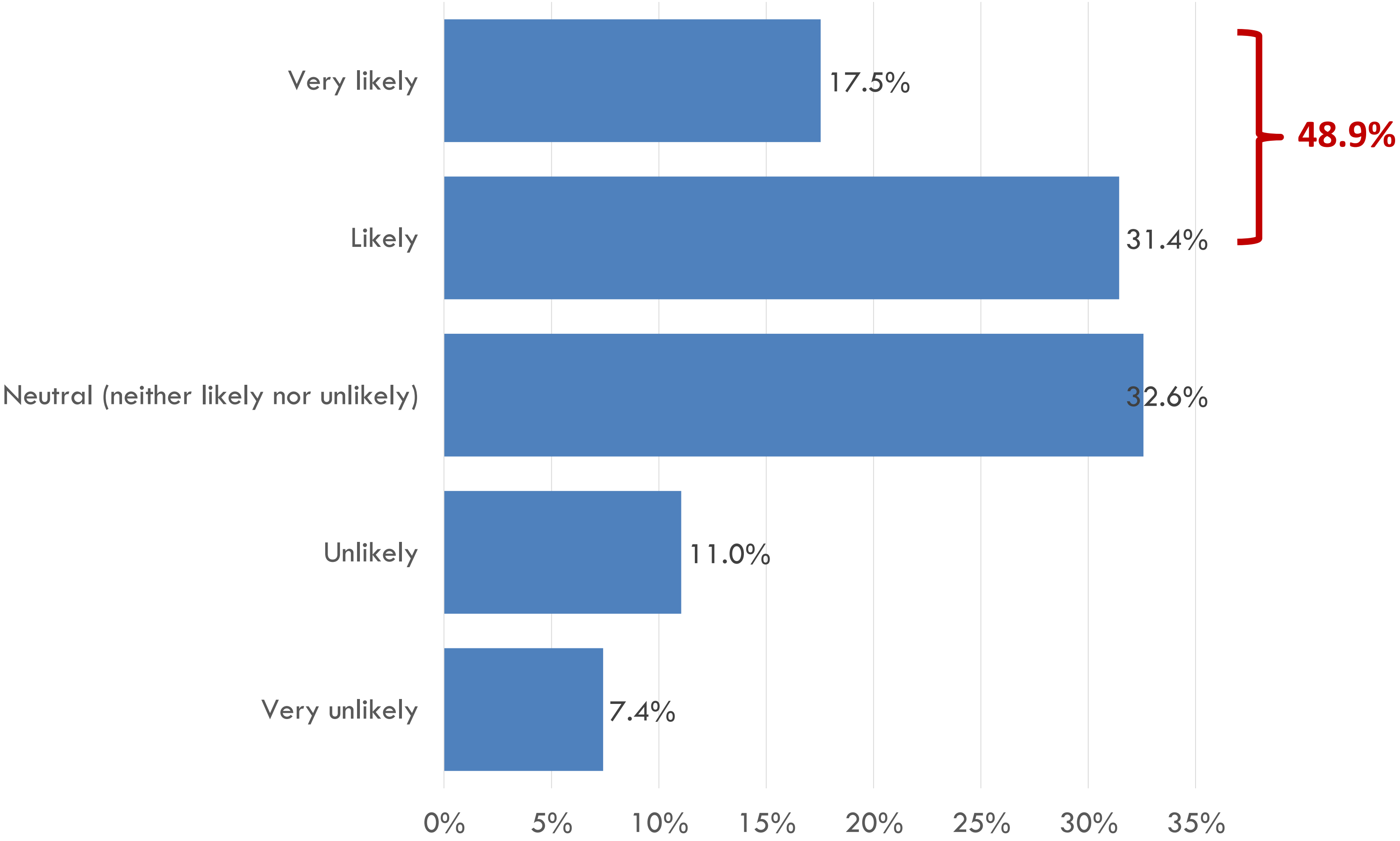
# Fall Workcations

# POTENTIAL FOR REMOTE WORK

**Question:** Does your job allow you to work remotely? (Select one)

*(Base: Wave 29 data. Employed respondents, 901 completed surveys. Data collected Sep 25-27, 2020)*

No, 41.3%

Yes, 58.7%
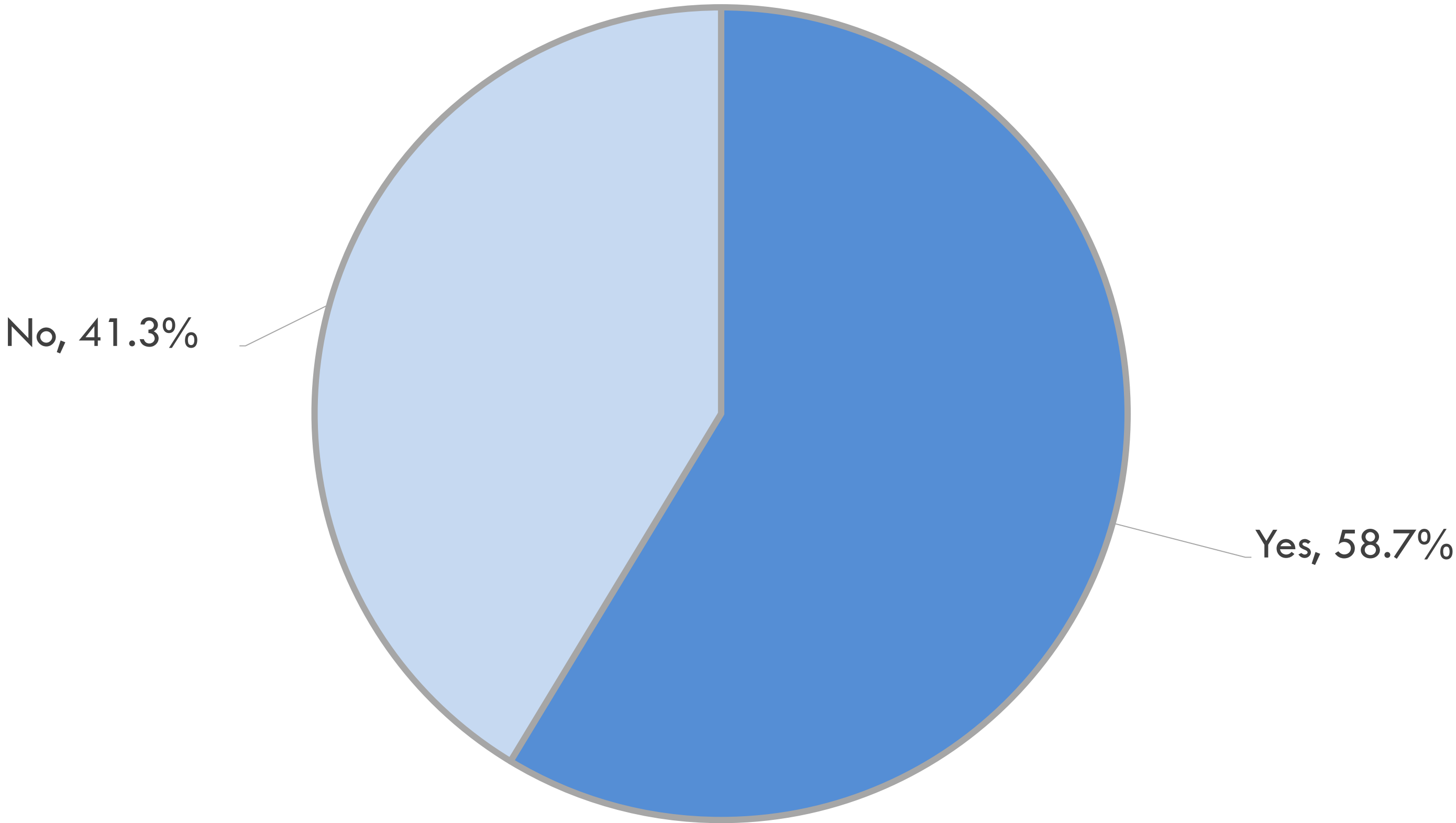
# INTEREST IN WORKCATIONS THIS FALL

**Question:** A "Workcation" is a new term being used to describe travel where people visit a vacation destination while still working remotely.
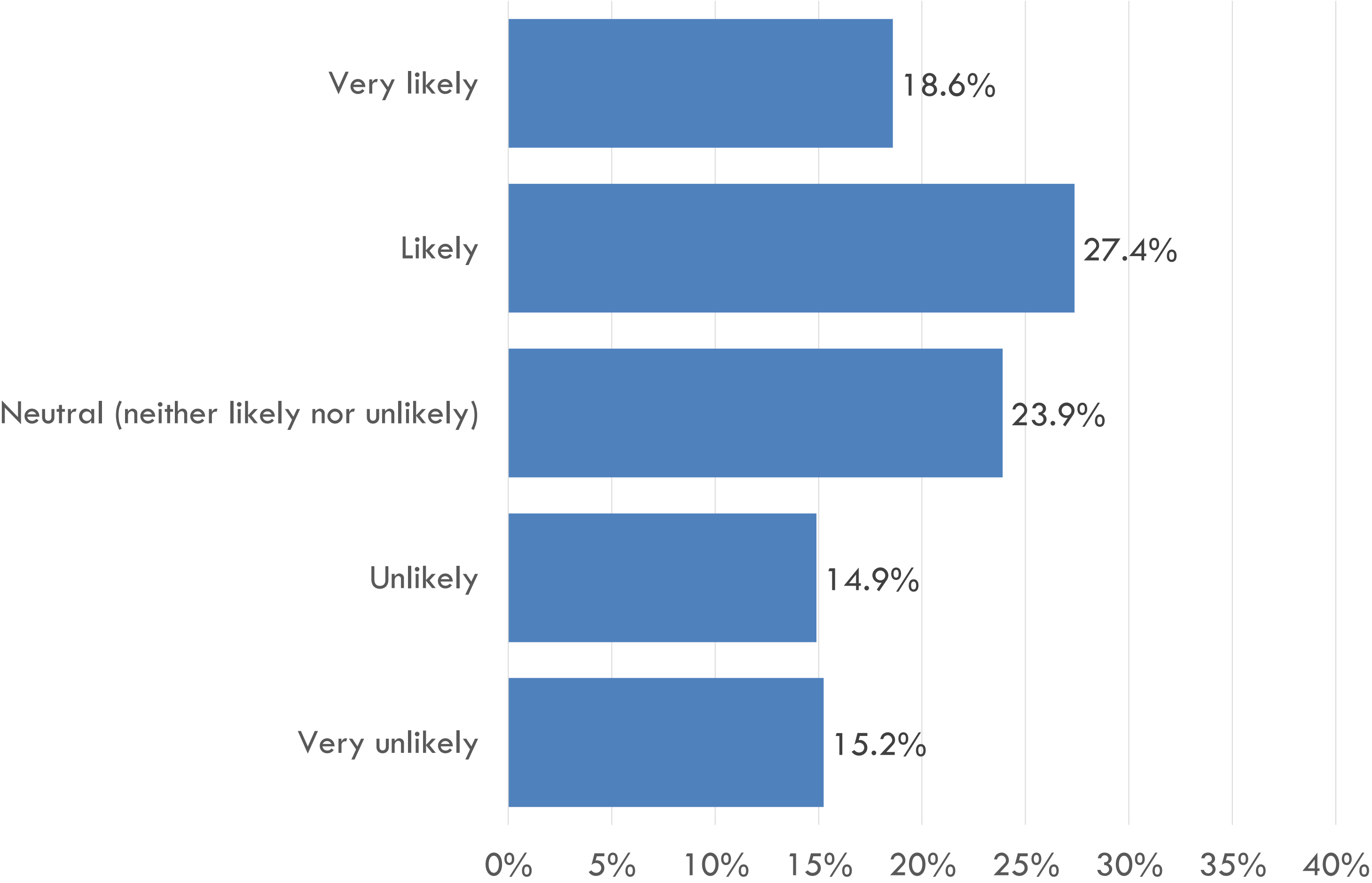
**How interested would you be in taking a "workcation" this Fall?**

*(Base: Wave 29 data. Respondents who can work remotely, 526 completed surveys. Data collected Sep 25-27, 2020)*



| Category | Percentage |
|---|---|
| Very interested | 25.8% |
| Interested | 19.9% |
| Slightly interested | 18.3% |
| Not at all interested | 36.0% |
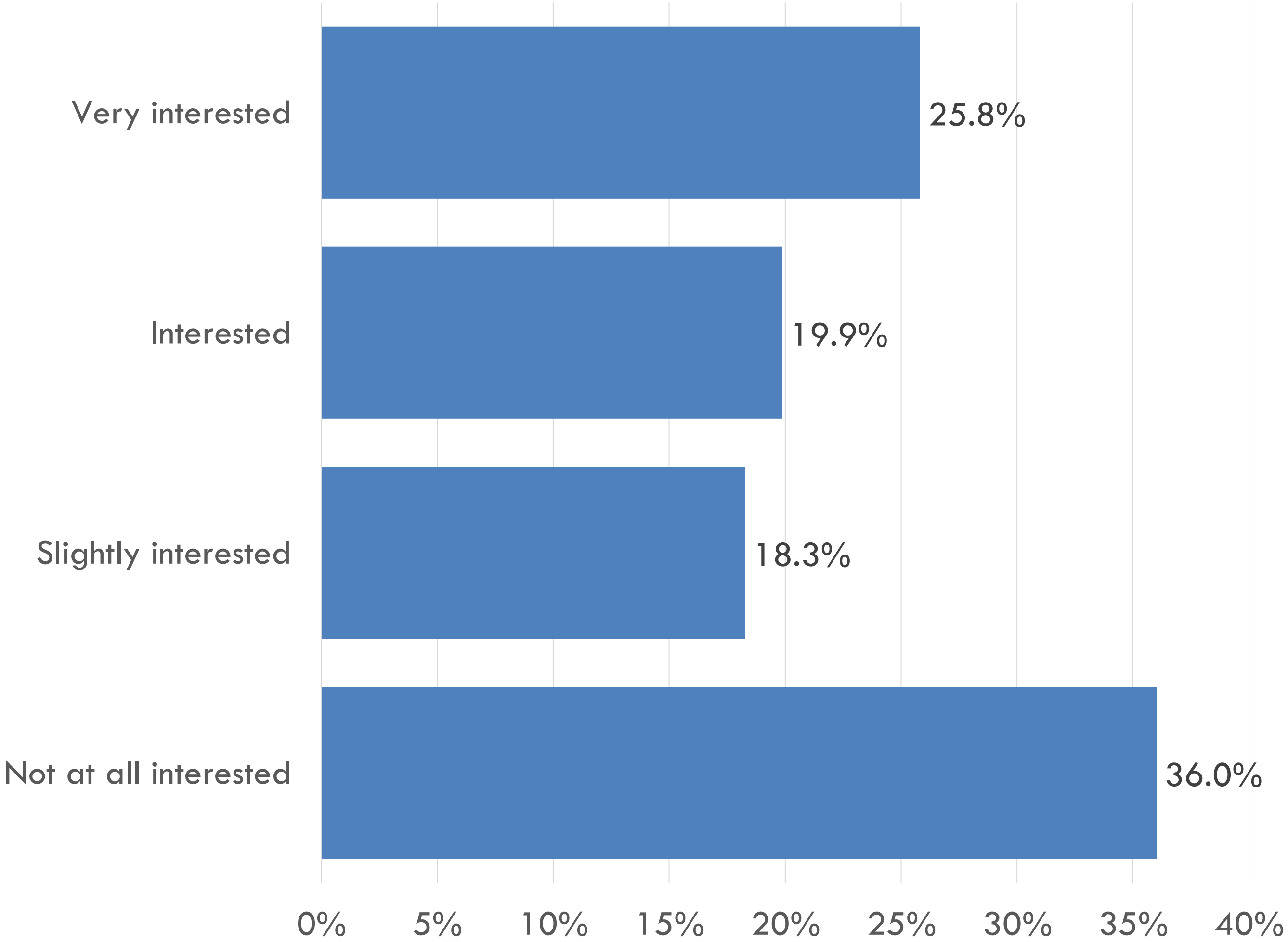
# LIKELIHOOD OF TAKING A WORKCATION THIS FALL

**Question:** How likely are you to take a "workcation" this Fall?

*(Base: Wave 29 data. Respondents interested to any degree in workcations, 329 completed surveys. Data collected Sep 25-27, 2020)*
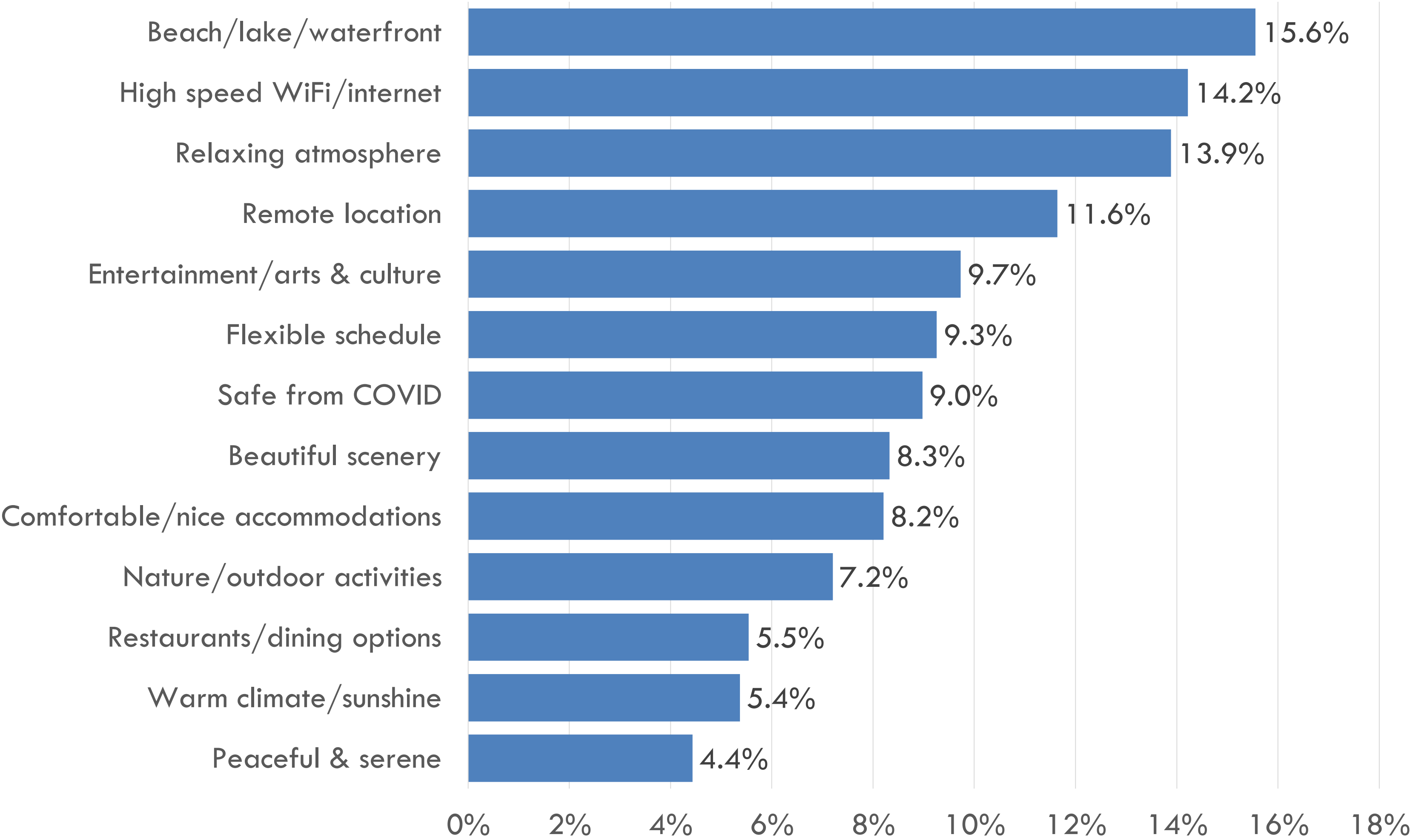


Very likely — 18.6%
Likely — 27.4%
Neutral (neither likely nor unlikely) — 23.9%
Unlikely — 14.9%
Very unlikely — 15.2%

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# Market potential…



Employed (77.2%) → Employer allows remote work (58.7%) → Interested in taking a Fall workcation (64.0%) → Likely to take a Fall workcation (46.0%) → 13.3% (of all travelers)
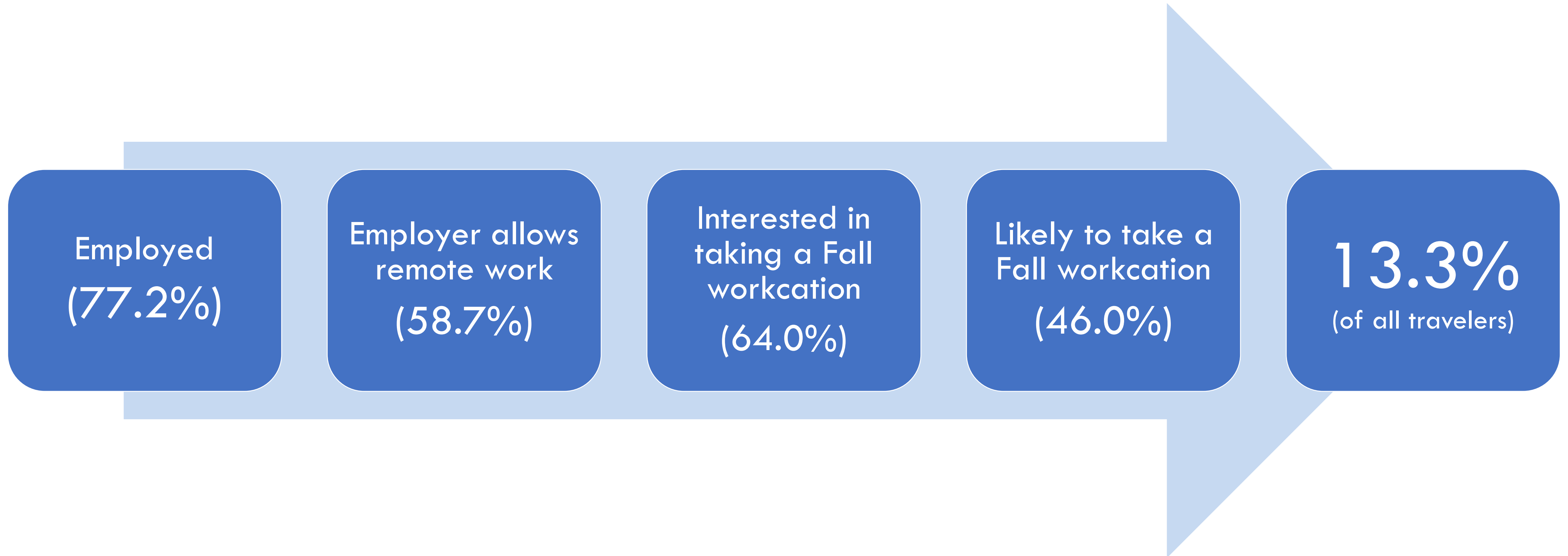
# CHARACTERISTICS OF AN IDEAL WORKCATION DESTINATION

**Question:** What would be the ideal characteristics of a "workcation destination" for you? (Write in as many as three)

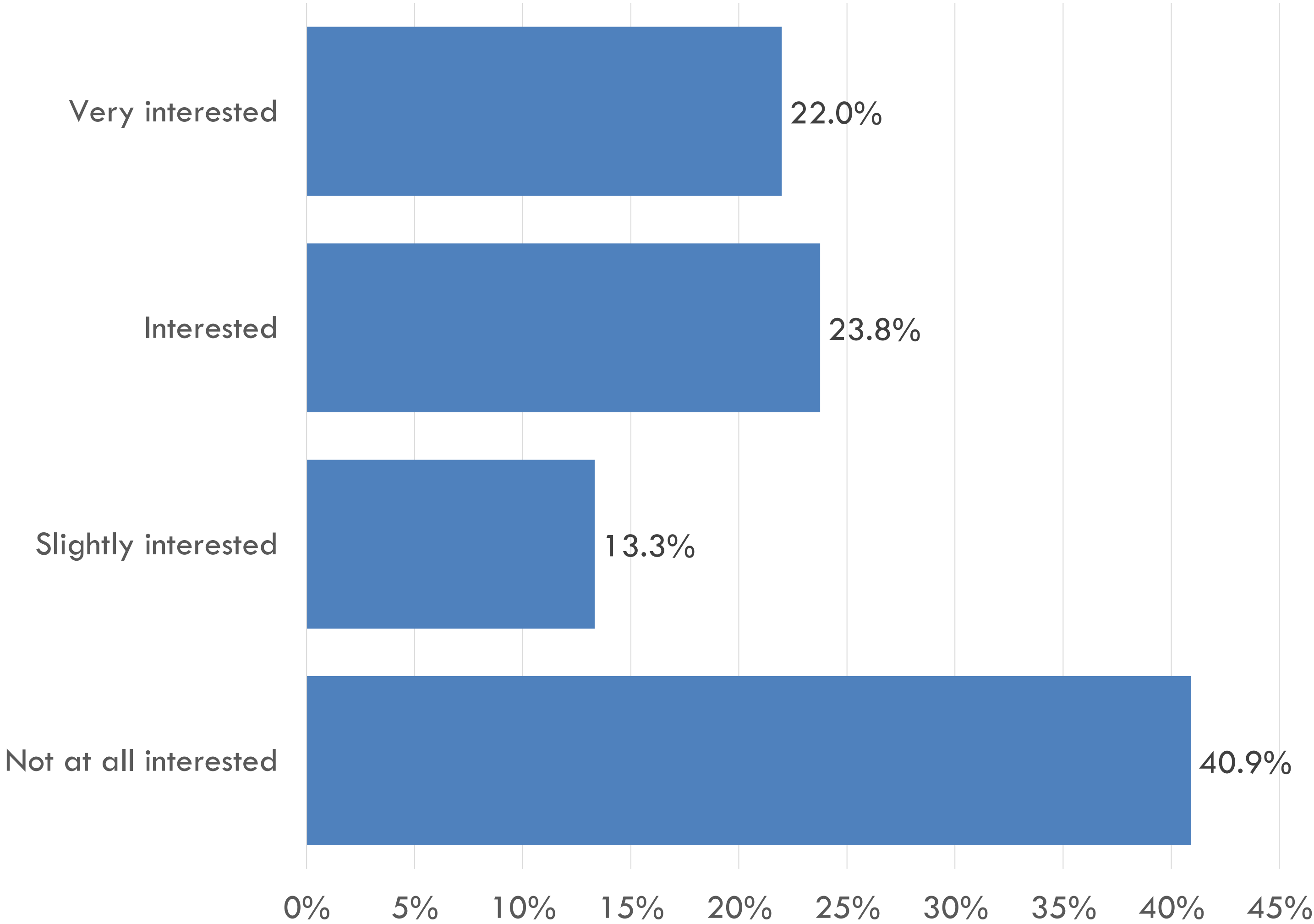*(Base: Wave 29 data. All respondents, 1,204 completed surveys. Data collected Sep 25-27, 2020)*



| Characteristic | Percentage |
|---|---|
| Beach/lake/waterfront | 15.6% |
| High speed WiFi/internet | 14.2% |
| Relaxing atmosphere | 13.9% |
| Remote location | 11.6% |
| Entertainment/arts & culture | 9.7% |
| Flexible schedule | 9.3% |
| Safe from COVID | 9.0% |
| Beautiful scenery | 8.3% |
| Comfortable/nice accommodations | 8.2% |
| Nature/outdoor activities | 7.2% |
| Restaurants/dining options | 5.5% |
| Warm climate/sunshine | 5.4% |
| Peaceful & serene | 4.4% |

# Fall Schoolcations

# INTEREST IN SCHOOLCATIONS

**Question:** A "Schoolcation" is a new term being used this year to describe travel where students can vacation with their families while attending classes online.

**How interested would you be in taking a "schoolcation" this Fall with your family?**

*(Base: Wave 29 data. Respondents who travel with children, 326 completed surveys. Data collected Sep 25-27, 2020)*

# LIKELIHOOD OF TAKING A FALL SCHOOLCATION

**Question:** How likely are you to take a "schoolcation" this Fall?

*(Base: Wave 29 data. Respondents with some level of interest in schoolcations, 180 completed surveys. Data collected Sep 25-27, 2020)*



Very likely — 24.9%
Likely — 27.3%
Neutral (neither likely nor unlikely) — 29.3%
Unlikely — 9.1%
Very unlikely — 9.4%

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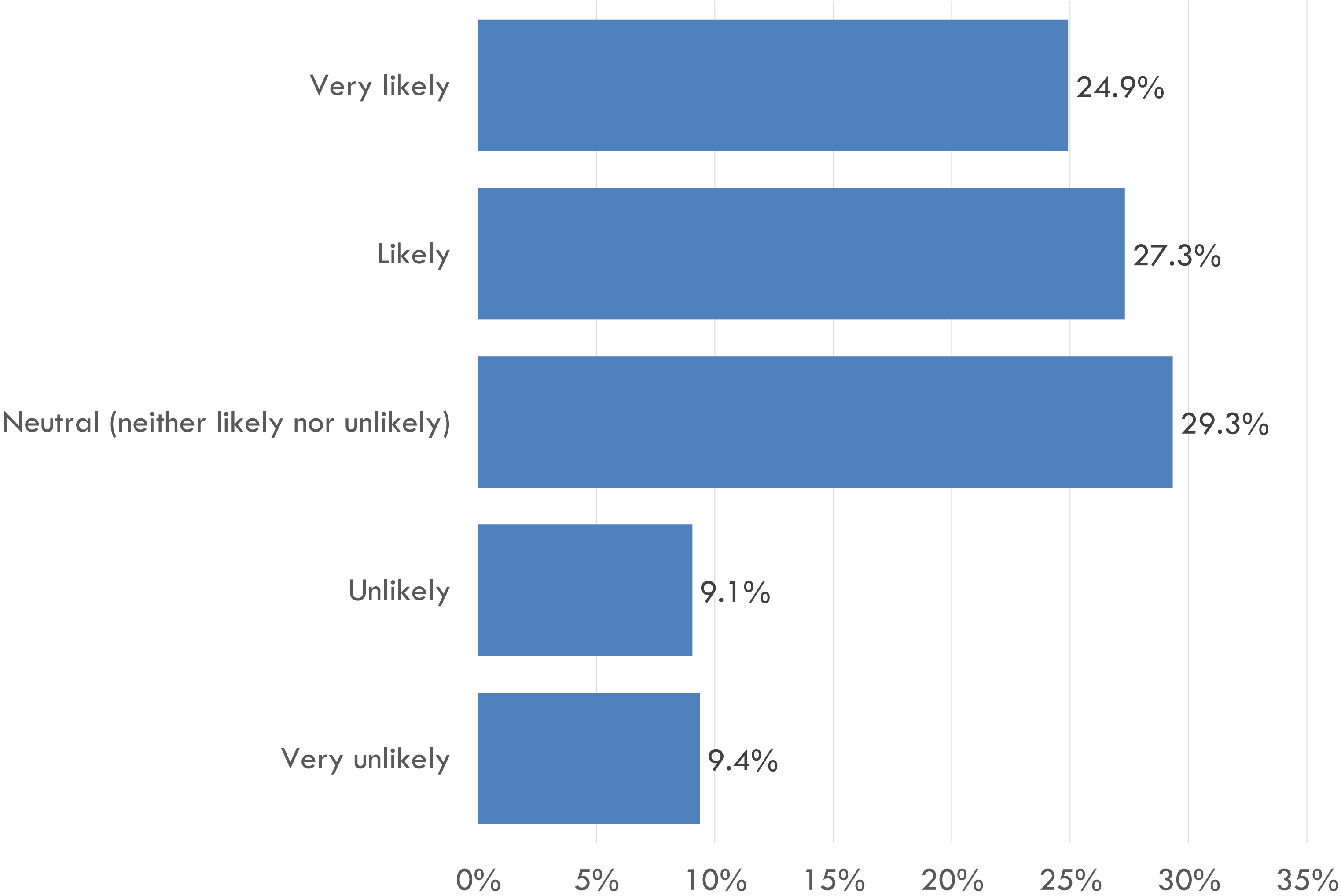
# Market potential…

Travels with kids living in household (28.4%)

Interested in taking a schoolcation this Fall (45.7%)

Likely to take a Schoolcation this Fall (52.2%)

6.8% (of all travelers)

# CHARACTERISTICS OF AN IDEAL SCHOOLCATION DESTINATION

**Question:** What would be the ideal characteristics of a "schoolcation" destination for you? (Write in as many as three)

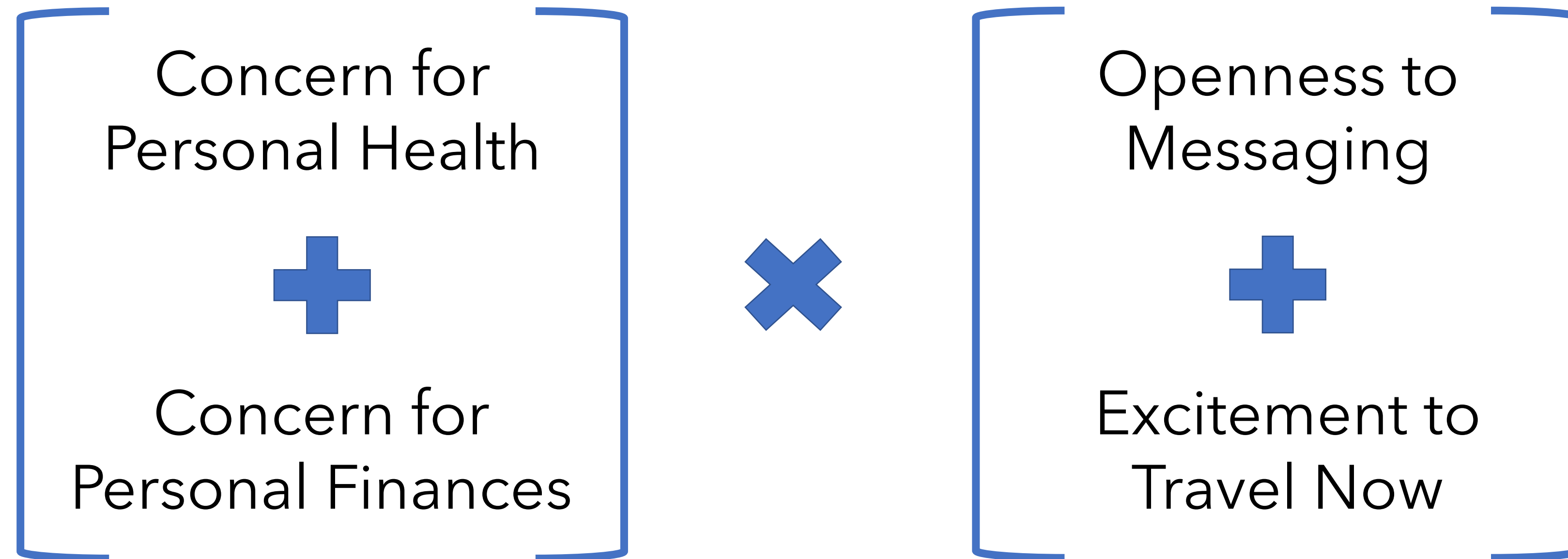*(Base: Wave 29 data. All respondents, 1,204 completed surveys. Data collected Sep 25-27, 2020)*

| Characteristic | Percentage |
|---|---|
| Fun | 15.3% |
| Beach/lake/waterfront | 12.3% |
| Quiet/Peaceful | 10.1% |
| Relaxing atmosphere | 9.5% |
| Safe from COVID | 9.4% |
| High speed WiFi/internet | 7.3% |
| Close to home | 6.3% |
| Family get together | 6.0% |
| Nice weather | 5.3% |
| Beautiful scenery | 4.9% |
| Affordable | 4.8% |
| Island | 4.8% |
| Educational | 4.0% |
| Easily accessible | 3.7% |
| Forest | 3.7% |

Destination Analysts
DO YOUR RESEARCH
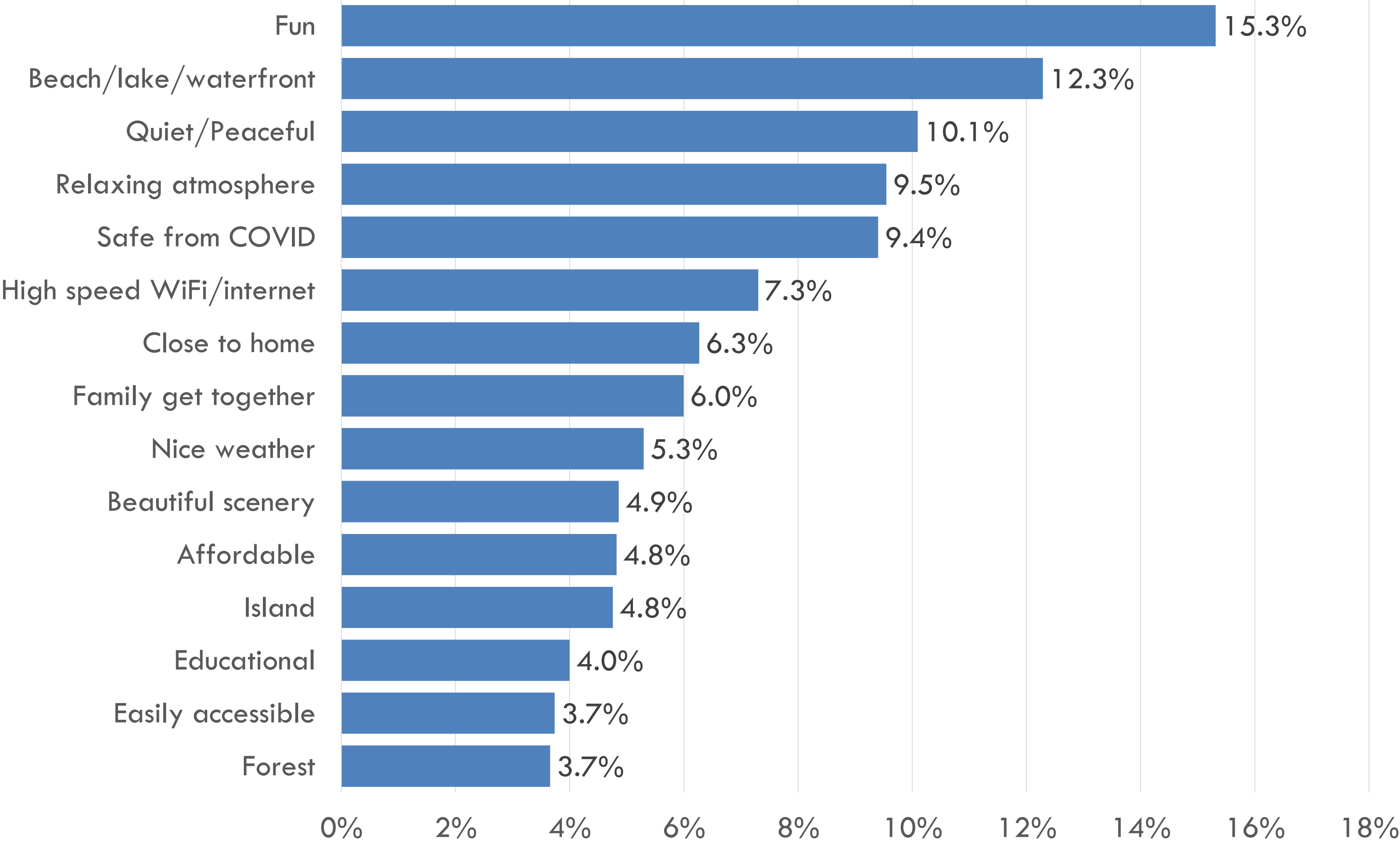
# Coronavirus Travel Sentiment Index
## Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 28th
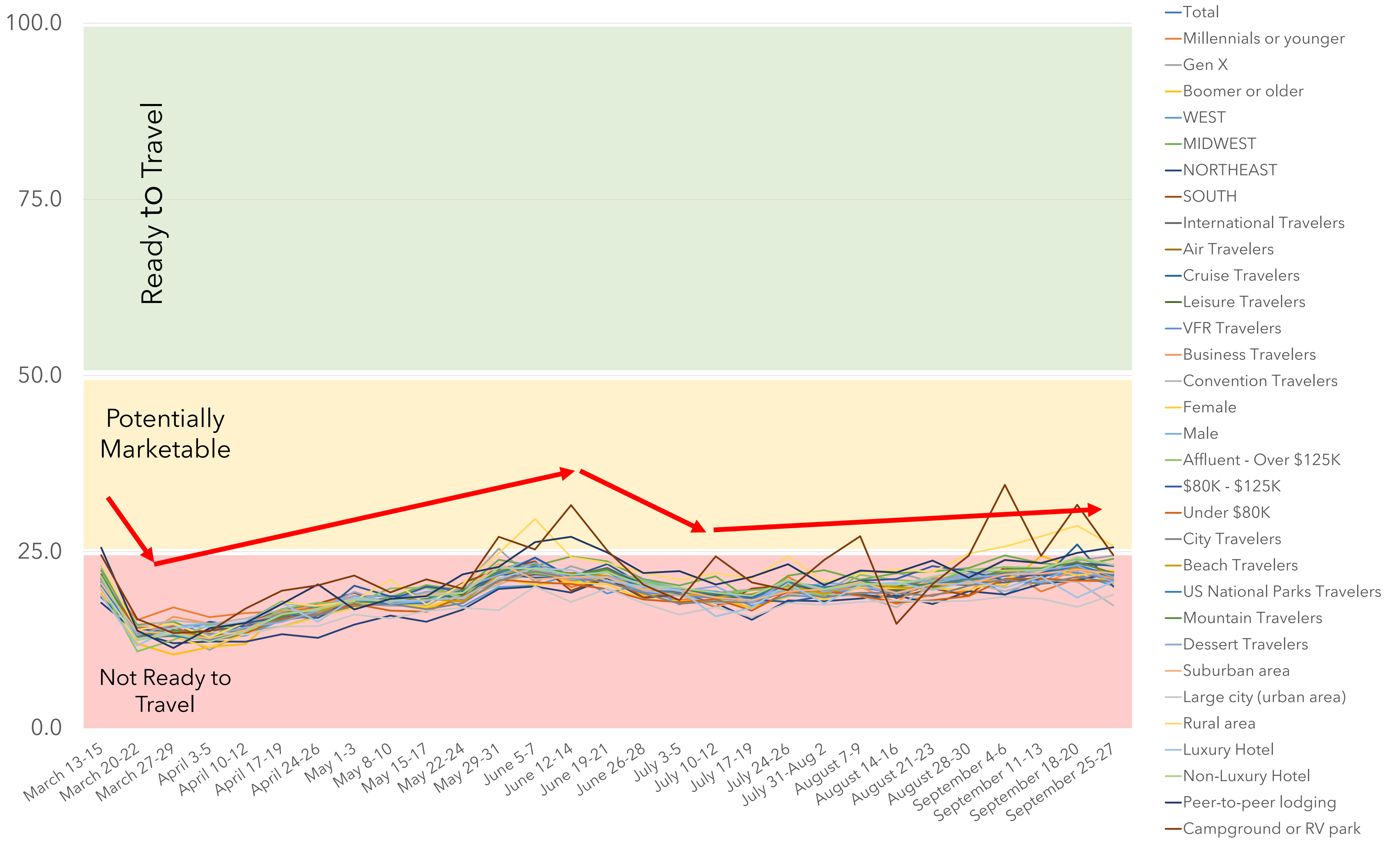
# Predictive Index Formula

$$\left[ \text{Concern for Personal Health} + \text{Concern for Personal Finances} \right] \times \left[ \text{Openness to Messaging} + \text{Excitement to Travel Now} \right]$$

*Normalized to a 100pt scale

**Healthy Travel Outlook**

Not Ready to Travel

Neutral

Potentially Marketable

Ready to Travel

70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%

0    1 - 25    26 - 50    51 - 75    76 - 100

■ High Travel

**Travel Outlook**

Neutral

Not Ready to Travel

Potentially Marketable

Ready to Travel

| | 0 | 1 - 25 | 26 - 50 | 51 - 75 | 76 - 100 |

- 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

**Ready to Travel**

**Potentially Marketable**

**Not Ready to Travel**

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, September 25-27

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

Generation

**Percent Potentially Marketable**
(Index Above 25)

# Gender

Female Male

**Percent Potentially Marketable**
**(Index Above 25)**

Female Male

Airline and Cruise Travelers

Percent Potentially Marketable
(Index Above 25)

US Regions

# Residence Type

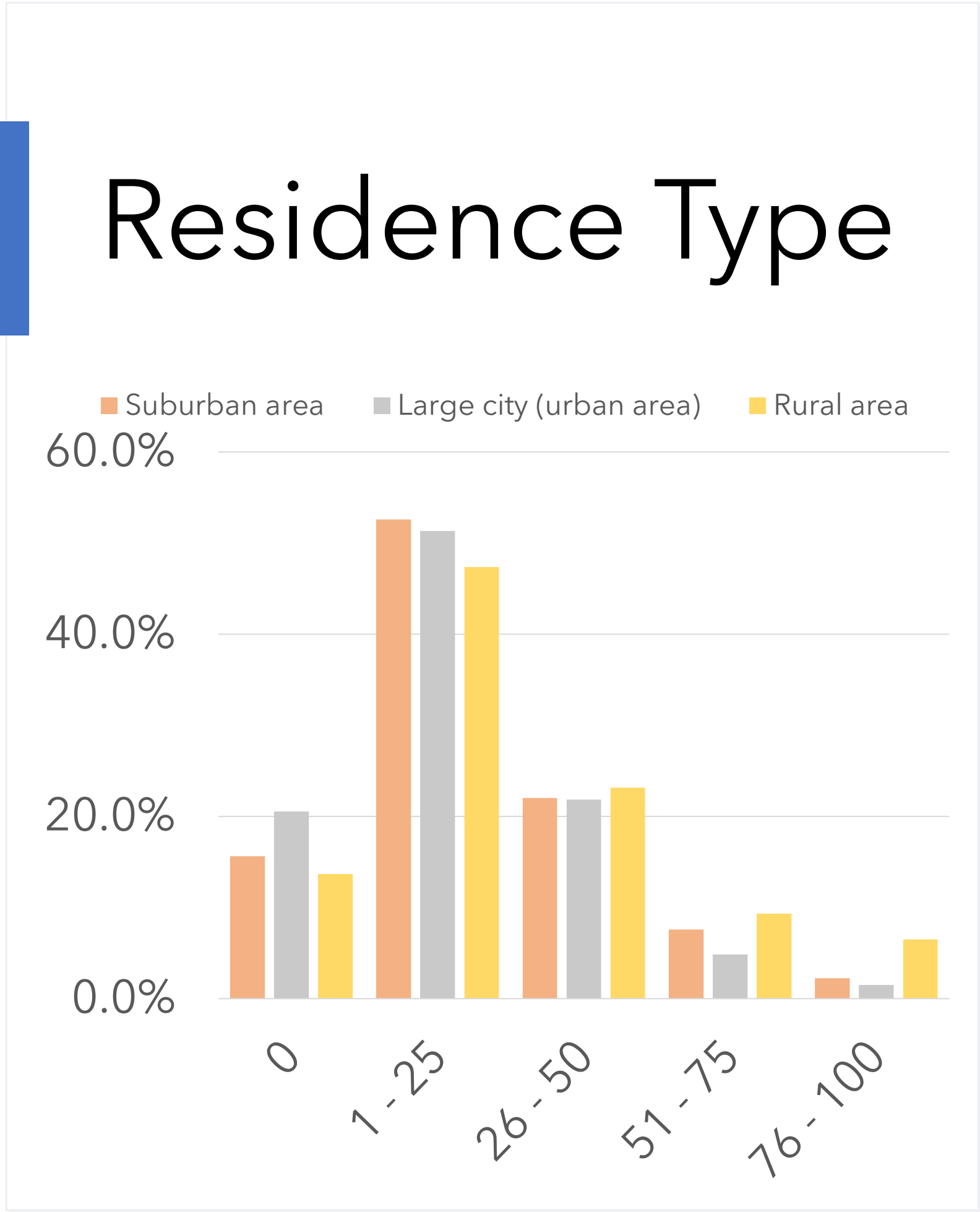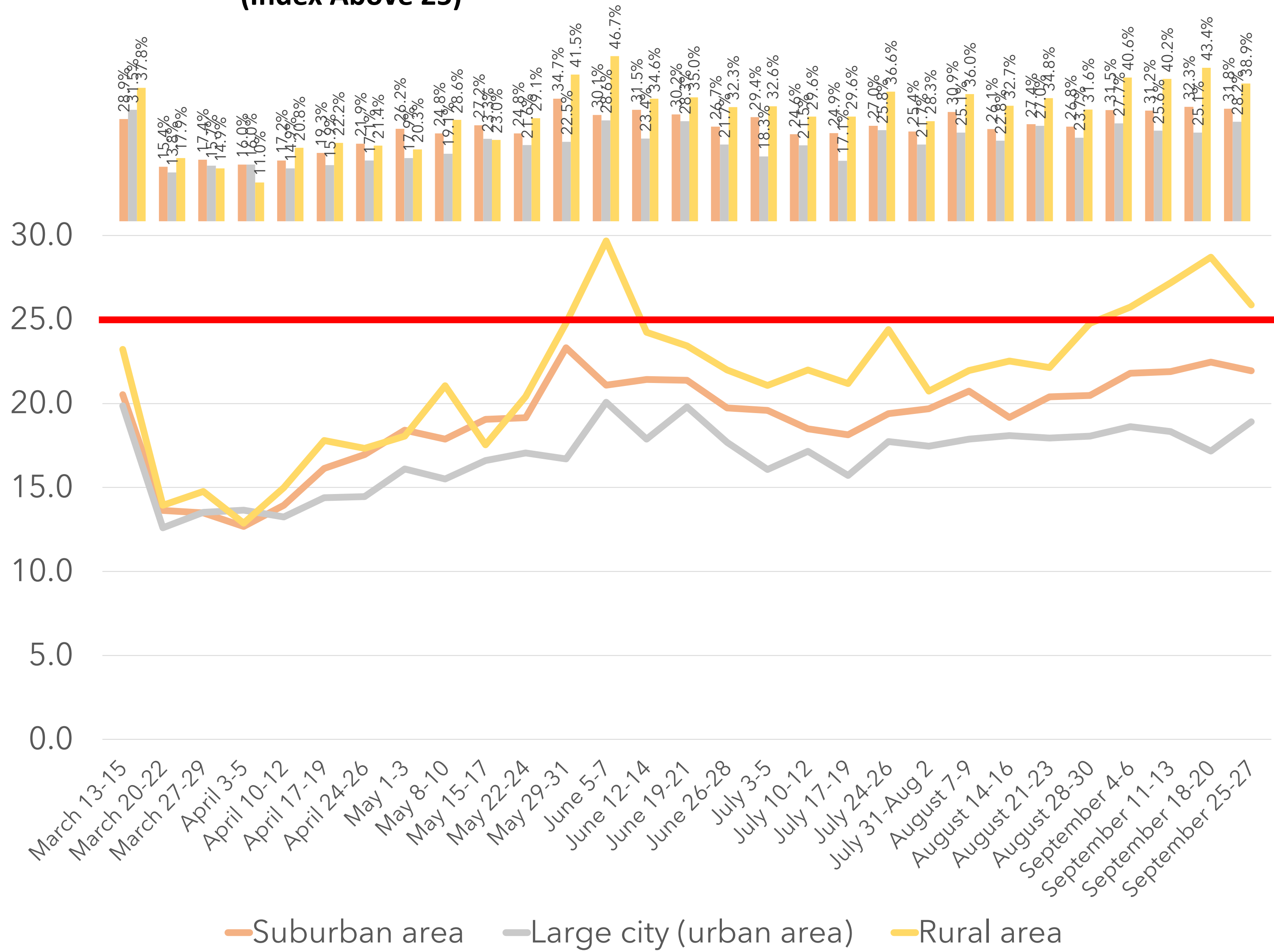Suburban area · Large city (urban area) · Rural area
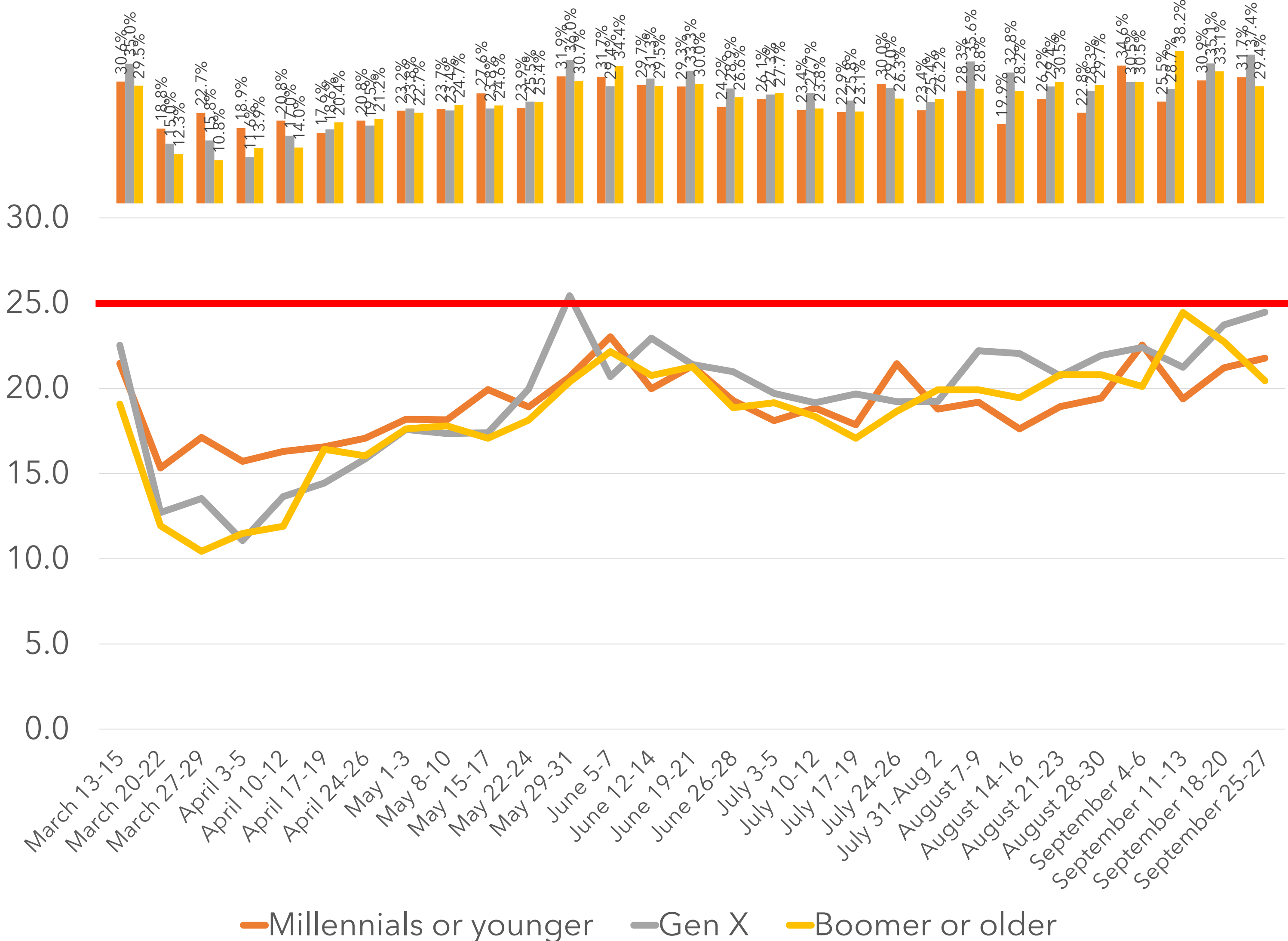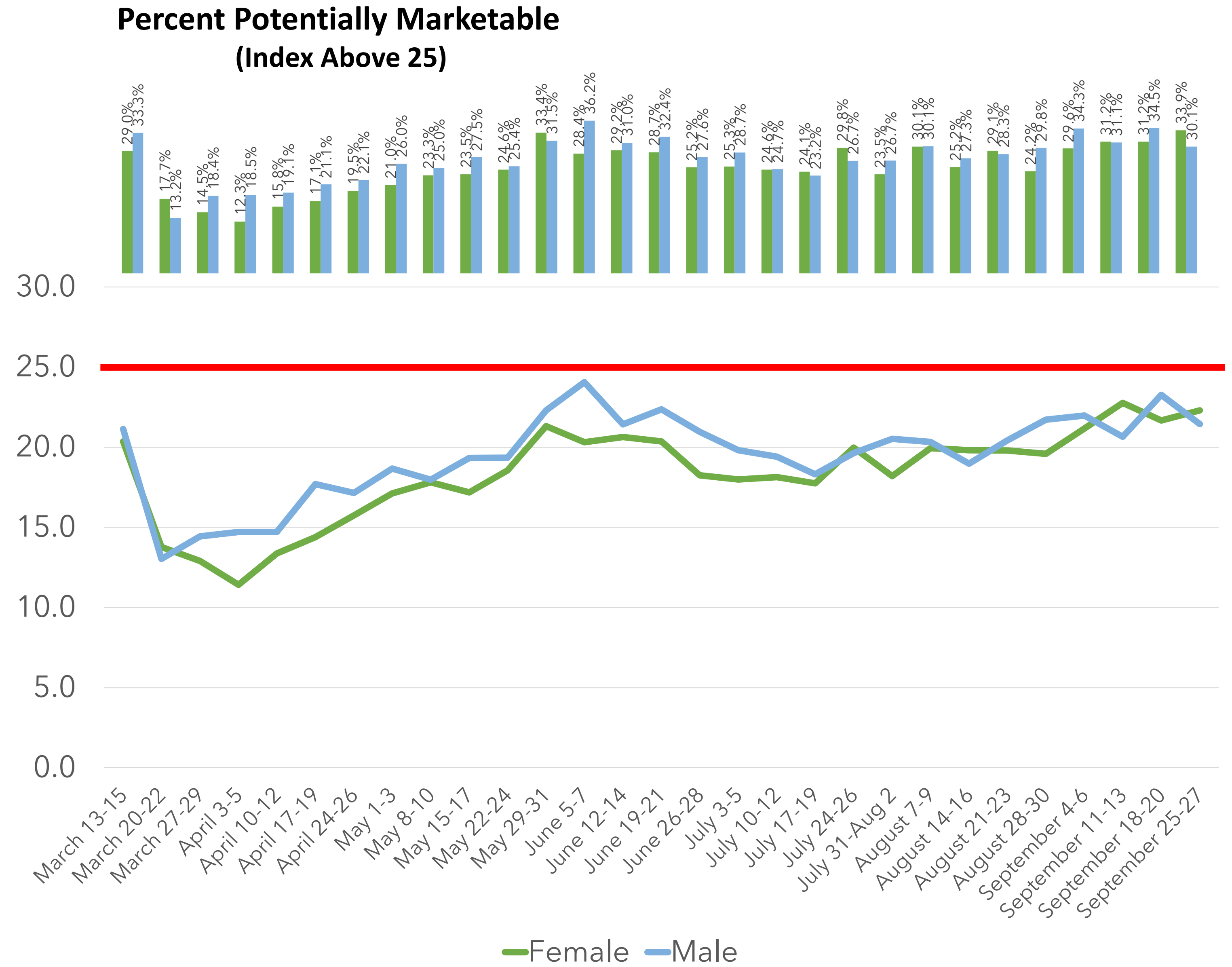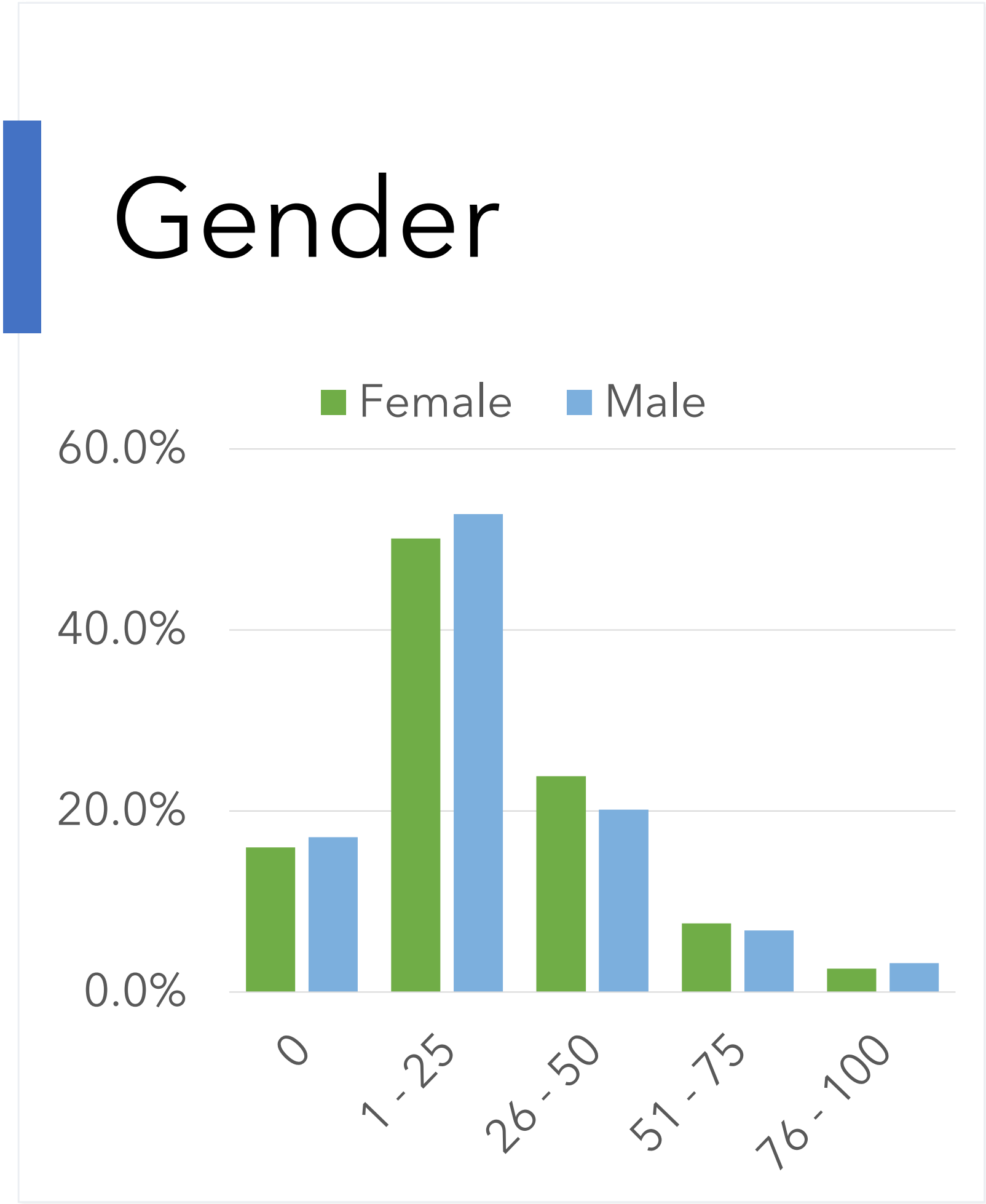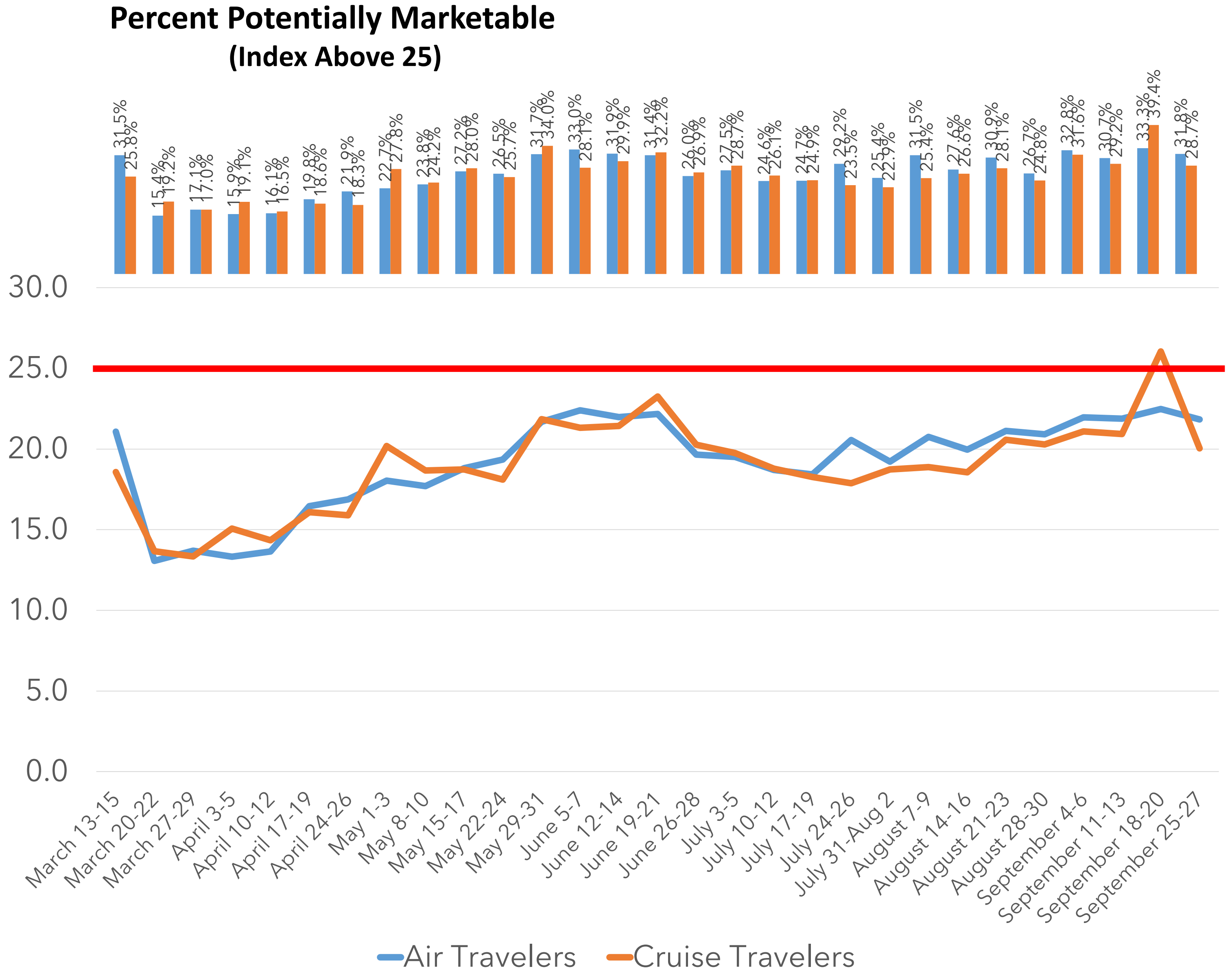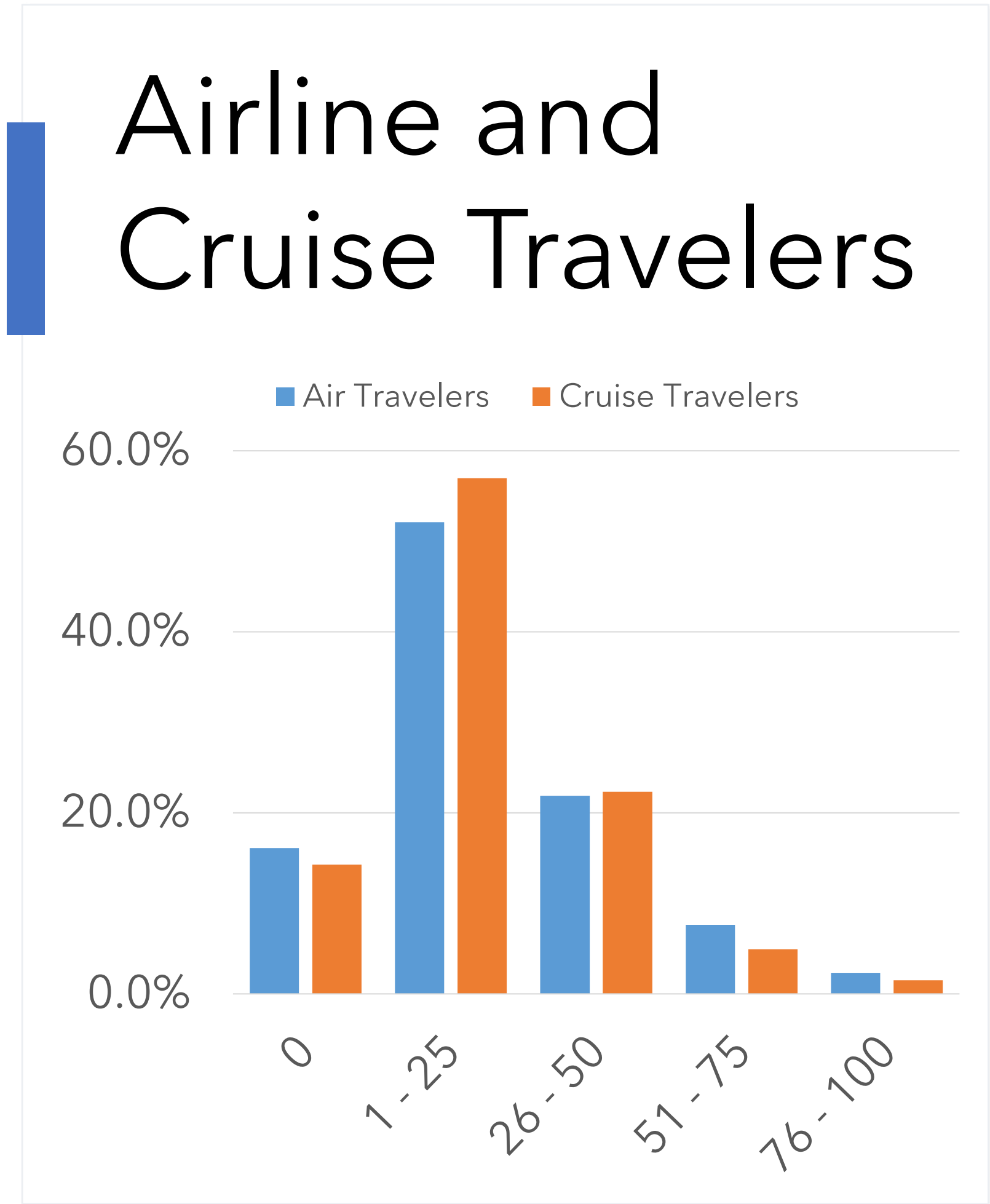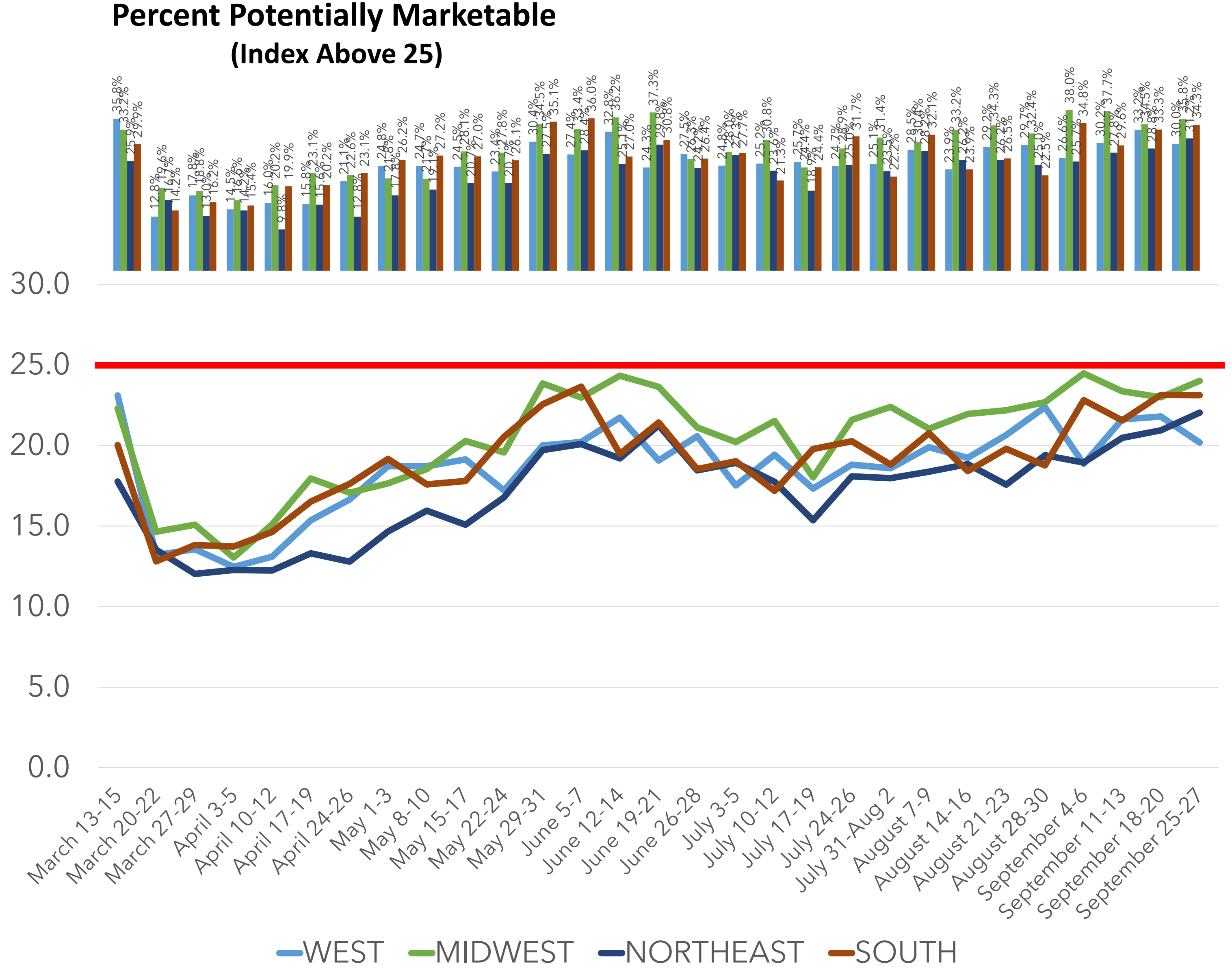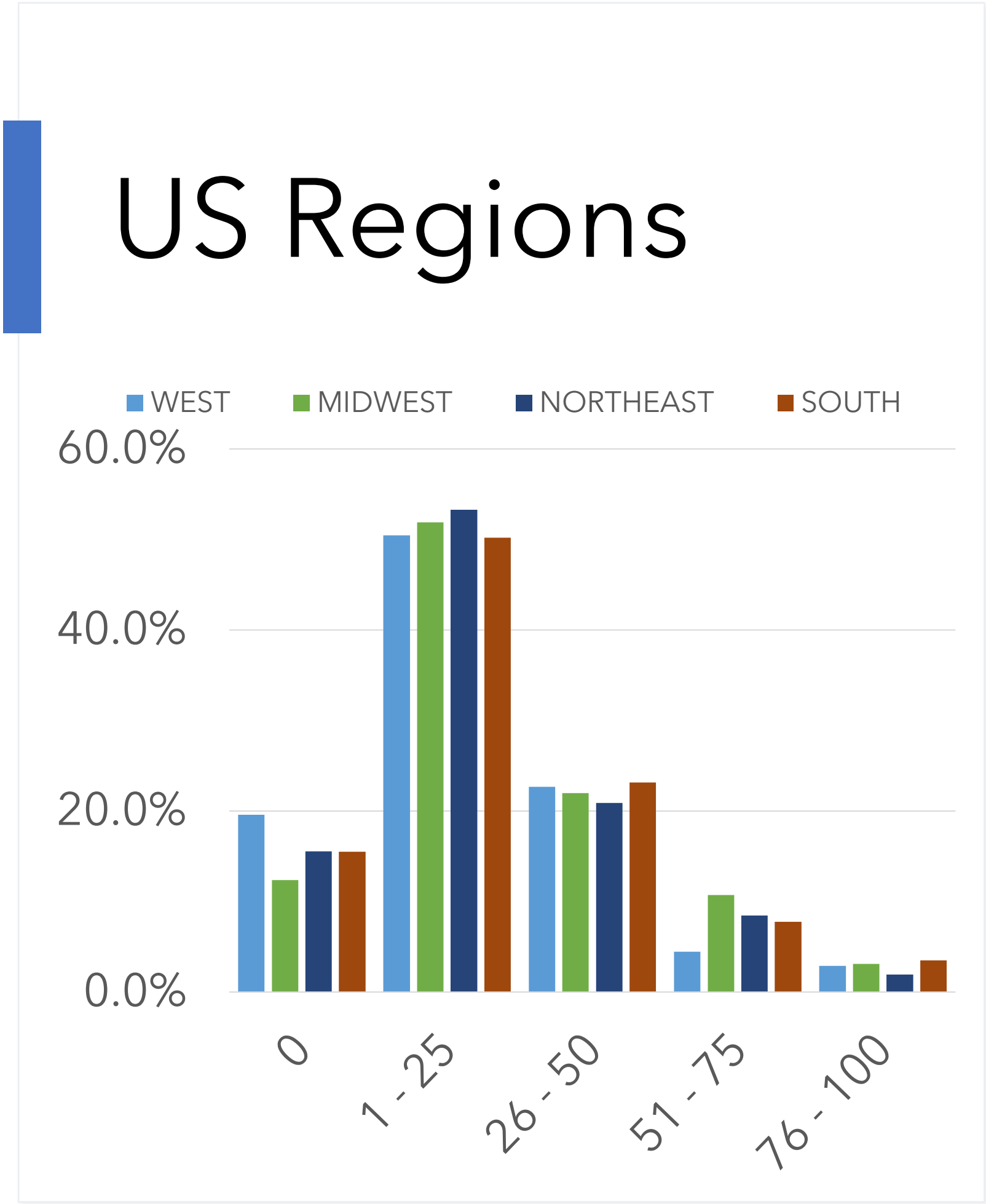
## Percent Potentially Marketable
### (Index Above 25)

# Lodging Preference
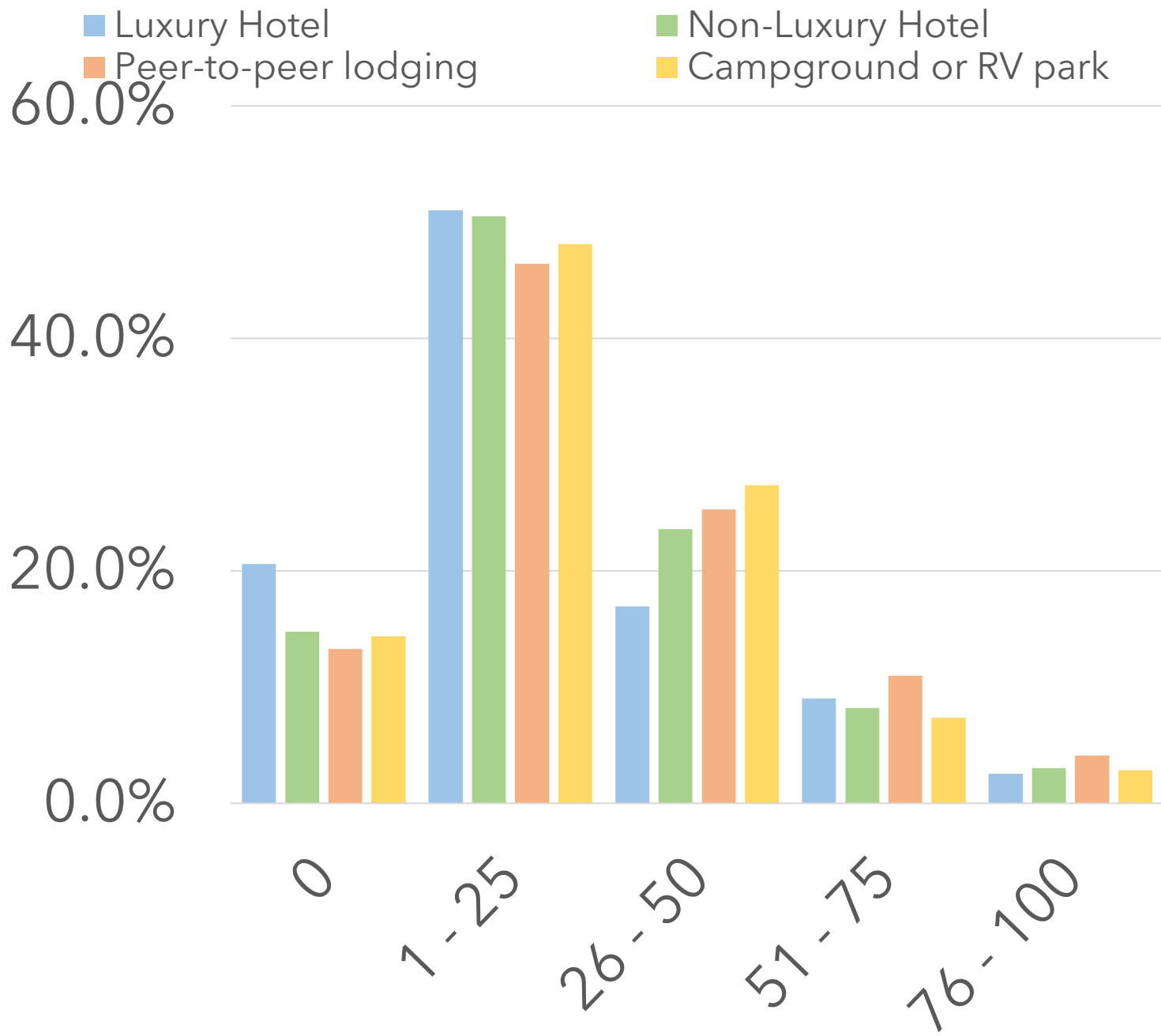


**Percent Potentially Marketable**
**(Index Above 25)**
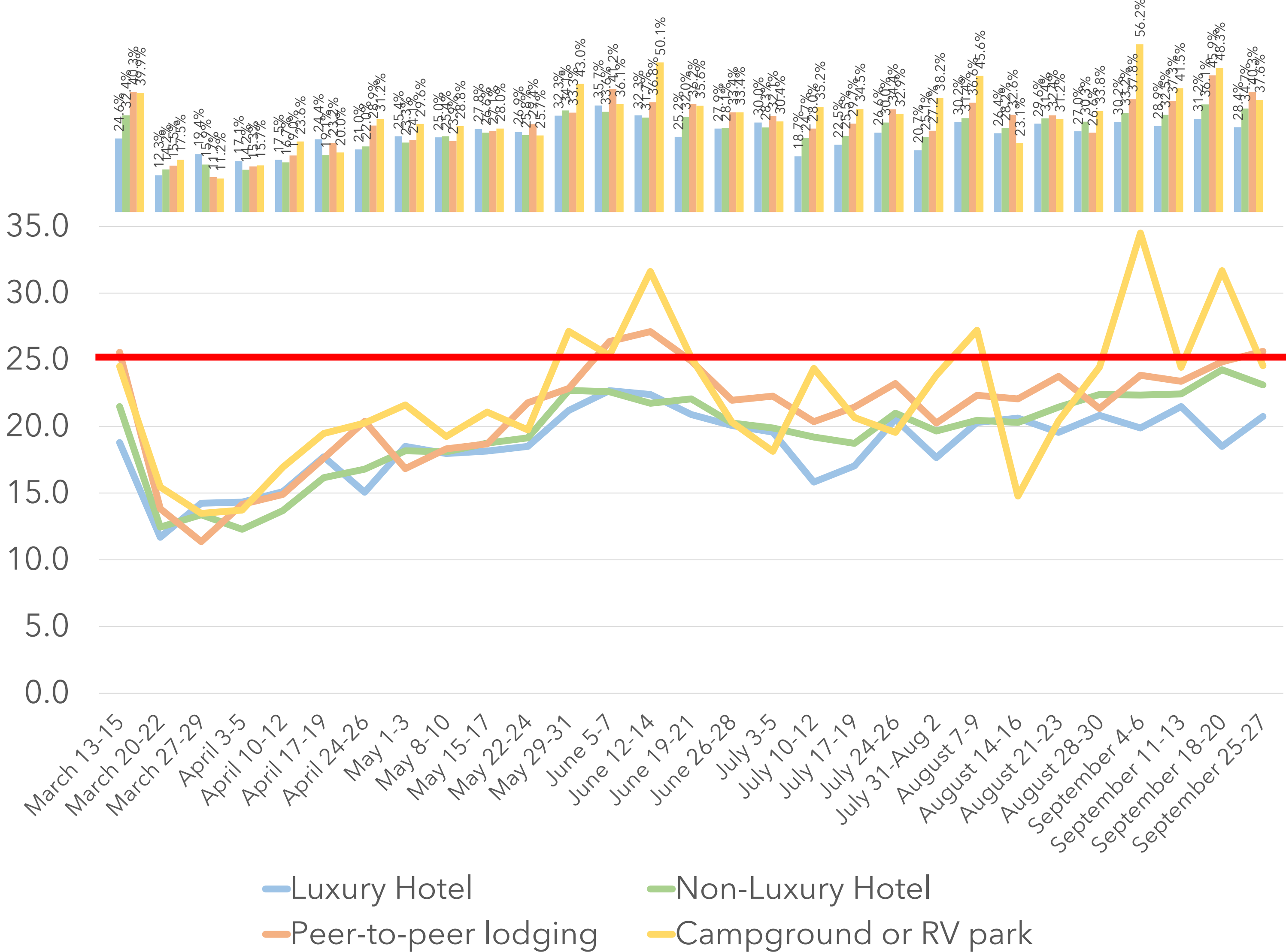
# Next/Ongoing Updates

- Key Findings 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

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# Subscribers

## Your online dashboard updates are ready!
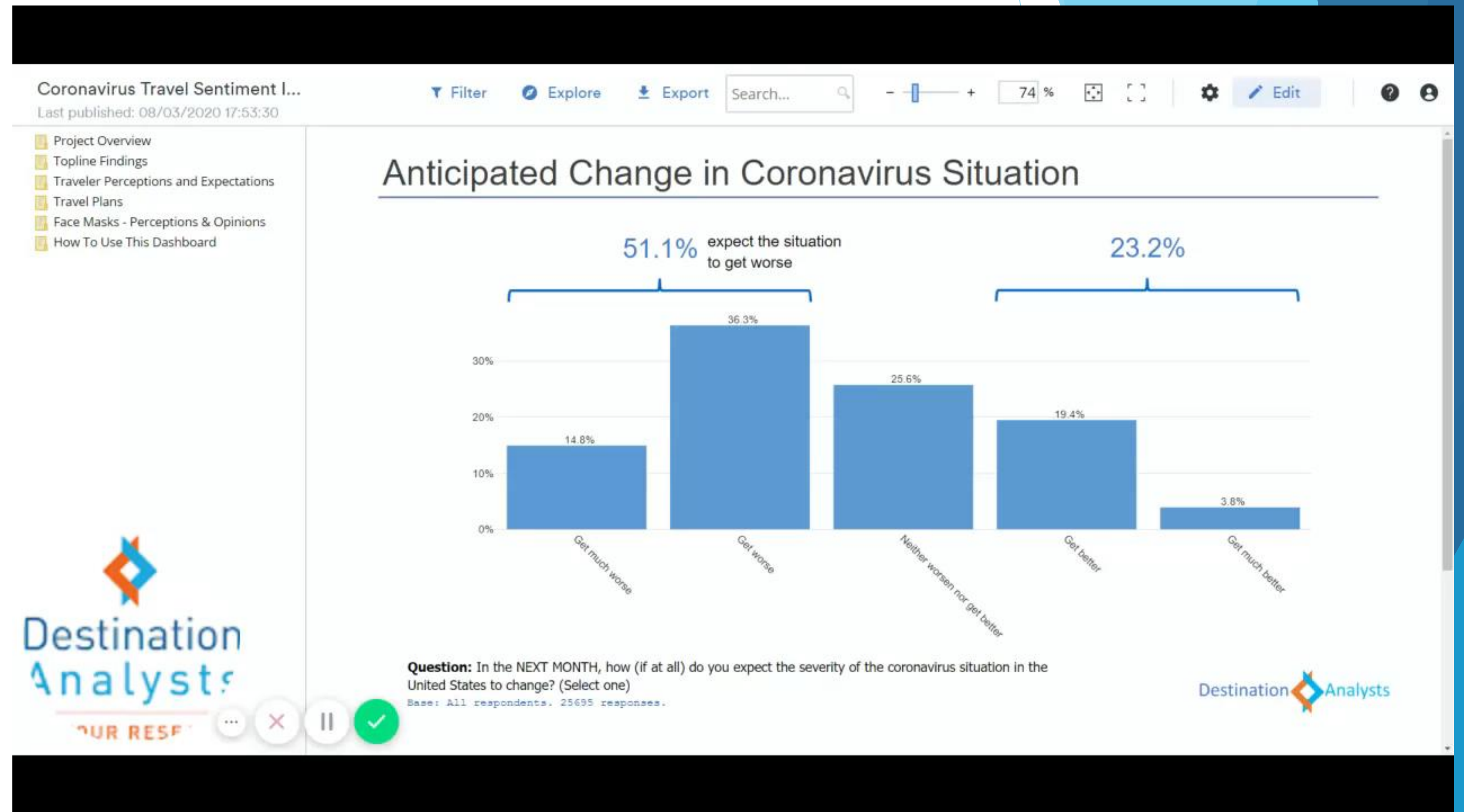
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Do you have a survey topic you want us to explore?

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

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# We Can Help You

- Visitor & Target Audience Profiles

- Brand Performance

- Visitor Activity Analysis & Segmentation

- Persona Research

- Resident + Stakeholder Research

- Advertising Testing

- Grant Support

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# Resources for Tourism Advocacy & Recovery

**destinationanalysts.com**

THIS YEAR ▼ 32.8876 ▲ 42.9841

First quarter Jan-Mar

Second Apr-Jun

Third quarter Jul-Sep

**ROI**

+41.9

+22.6

+10.3

+12.0

# Research & Data Support for Grant Applications & Recovery Programs

**info@destinationanalysts.com**