



# CORONAVIRUS TRAVEL SENTIMENT INDEX

Presentation of Key Findings  
*Week of October 5th*



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.

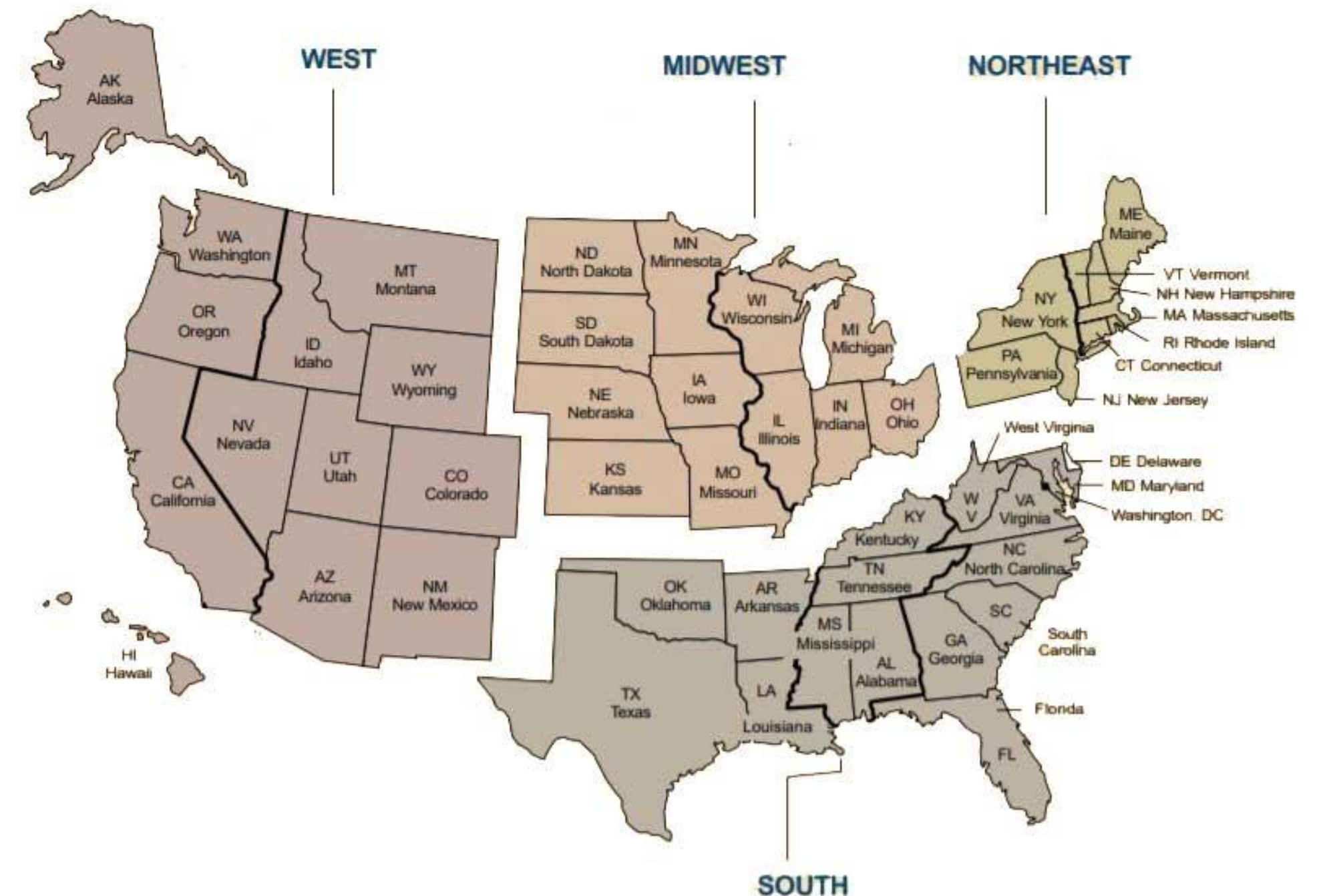
A close-up photograph of a piece of brown cardboard that has been torn. A jagged, irregular hole is cut through the center of the cardboard. The edges of the cardboard are rough and frayed. The text "Independent, unbiased research" is printed in a dark, sans-serif font across the white background visible through the hole. The cardboard itself is a warm, yellowish-brown color.


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 30 data (fielded October 2<sup>nd</sup>-4<sup>th</sup>) 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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USA  
7,310,625  
TOTAL CASES

CDC | Updated: Oct 3 2020 12:44PM

**208,118**  
**TOTAL DEATHS**

CDC | Updated: Oct 3 2020 12:44PM

### Cases in Last 7 Days

### Total Cases

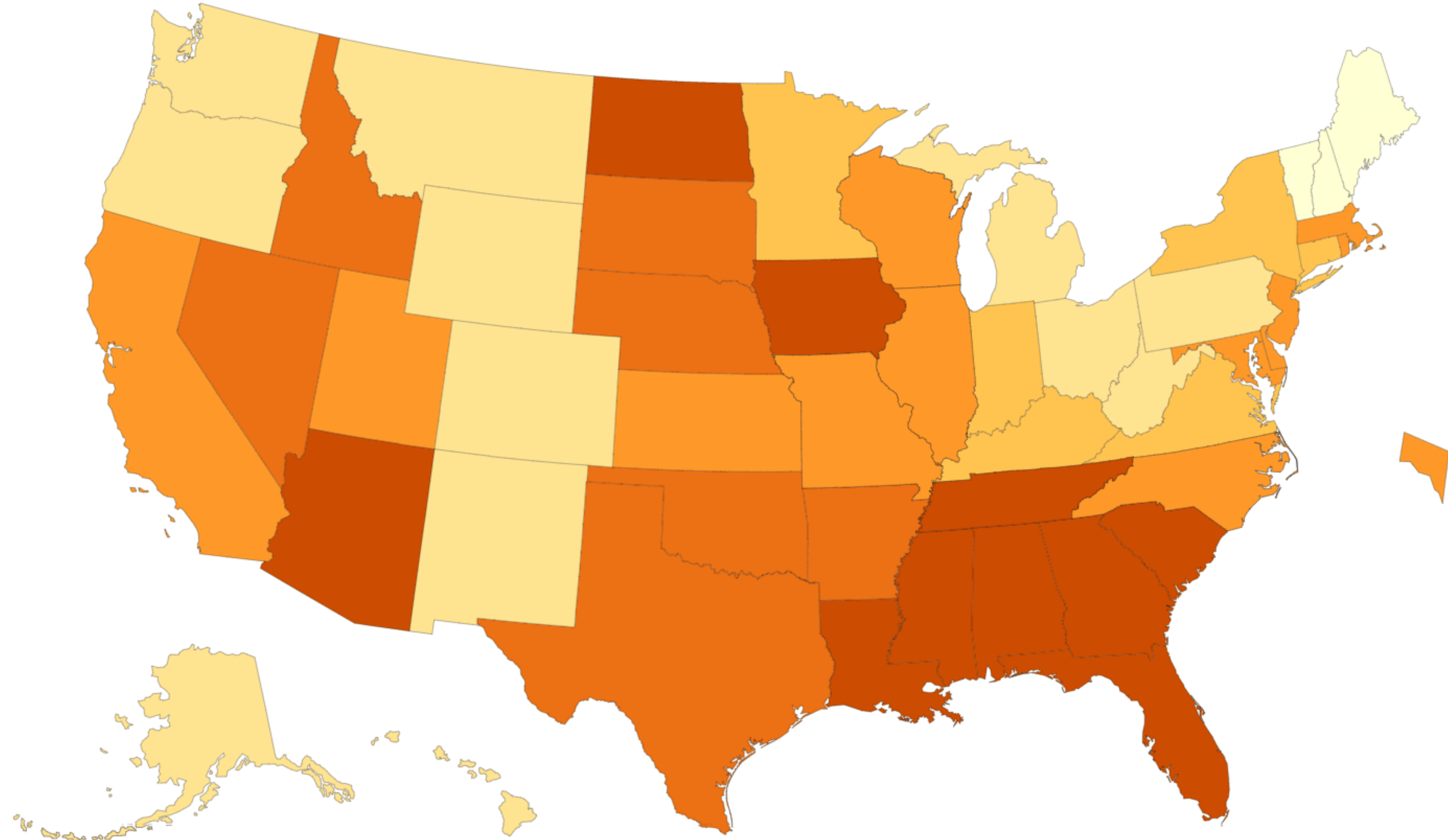
Cases per 100,000

### Deaths in Last 7 Days

### Total Deaths

Deaths per 100,000

COVID-19 Case Rate in the US Reported to the CDC, by State/Territory (cases per 100,000)



## Territories

AS FSM **GU** MP **PR** PW RMI VI

Case Rate per 100,000

0.629

815-1,432

1,577 - 1,942

2,044 - 2,378

2,430 - 2,846

2,884 - 3,623

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**CORONAVIRUS**  
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COVID-19 EFFECTS

WHO'S DYING

CASE COUNT

THE COVID STORM SERIES

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ECONOMY | ECONOMIC DATA

## U.S. Job Gains Slow as More Layoffs Become Permanent

Economy added 661,000 jobs in September; unemployment rate fell to 7.9%



An applicant entered a job fair in Tampa, Fla., last month. The September report on the U.S. labor market is the final one before the presidential election.

PHOTO: SCOTT KEELER/TAMPA BAY TIMES/ZUMA PRESS

MARKETS

## Disney leads companies announcing layoffs; big airline job cuts loom

PUBLISHED WED, SEP 30 2020 9:31 AM EDT | UPDATED WED, SEP 30 2020 11:55 AM EDT



Pippa Stevens  
@PIPPASTEVEN513

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### KEY POINTS

- A number of job cuts have been announced in the last 24 hours as companies grapple with the ongoing impact of the coronavirus pandemic.
- On Tuesday, Disney said it will lay off 28,000 employees across its parks, experiences and consumer products divisions.
- Royal Dutch Shell said it's cutting between 7,000 and 9,000 jobs, while Dow Inc. said it will reduce its workforce costs by 6%.



An employee cleans the grounds behind the closed gates of Disneyland Park on the first day of the closure of Disneyland and Disney California Adventure theme parks, in Anaheim, California, on March 14, 2020.

DAVID MCNEW / AFP / Getty Images

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### TRENDING NOW



Trump press secretary Kayleigh McEnany and two deputies test positive for coronavirus

## Trump Tests Positive for the Coronavirus

The president's result came after he spent months playing down the severity of the outbreak that has killed more than 207,000 in the United States and hours after insisting that "the end of the pandemic is in sight."



President Trump's positive test result posed immediate challenges for the future of his campaign with barely a month until Election Day. Erin Schaff/The New York Times



By Peter Baker and Maggie Haberman

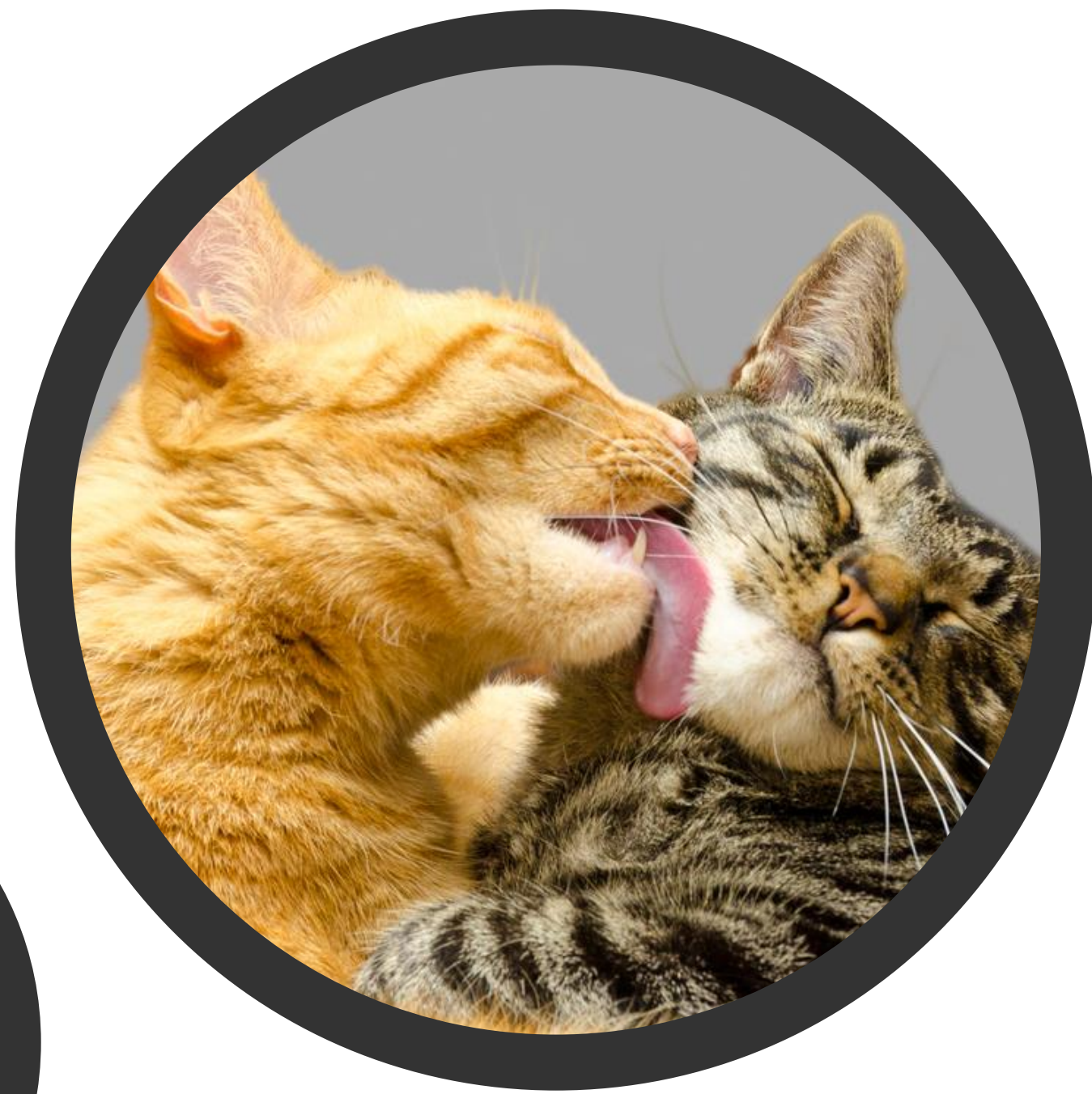
Published Oct. 2, 2020 Updated Oct. 3, 2020



[Leer en español](#)

[\[Follow our live coverage after President Trump's announcement of a positive test for the coronavirus.\]](#)

WASHINGTON — [President Trump](#) revealed early Friday morning that he and the first lady, [Melania Trump](#), had [tested positive for the coronavirus](#), throwing the nation's leadership into uncertainty and escalating the crisis posed by a pandemic that has already [killed more than 207,000](#) Americans and devastated the economy.



**How Travelers  
are Feeling Now**

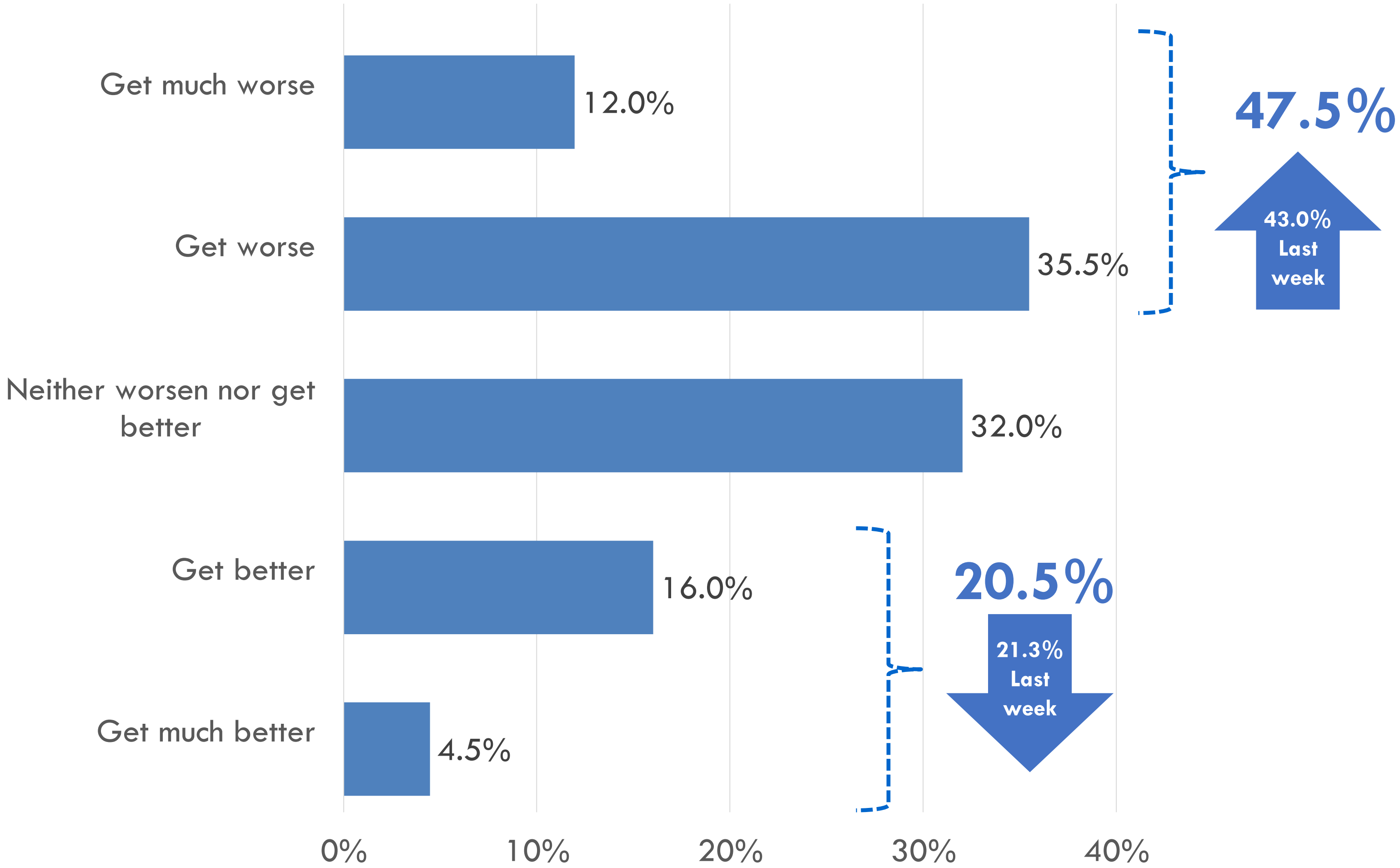


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

**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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

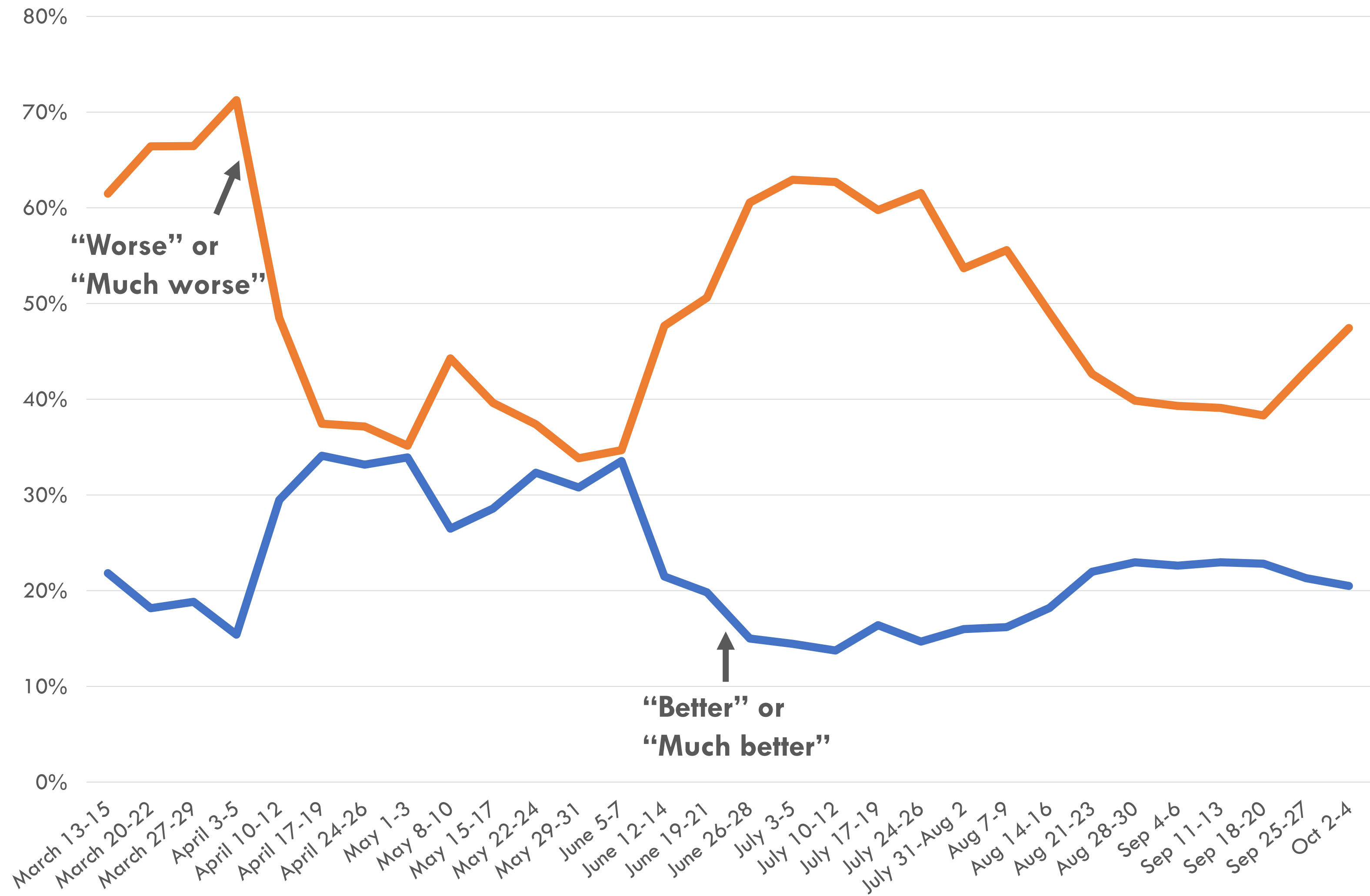


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-30)

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

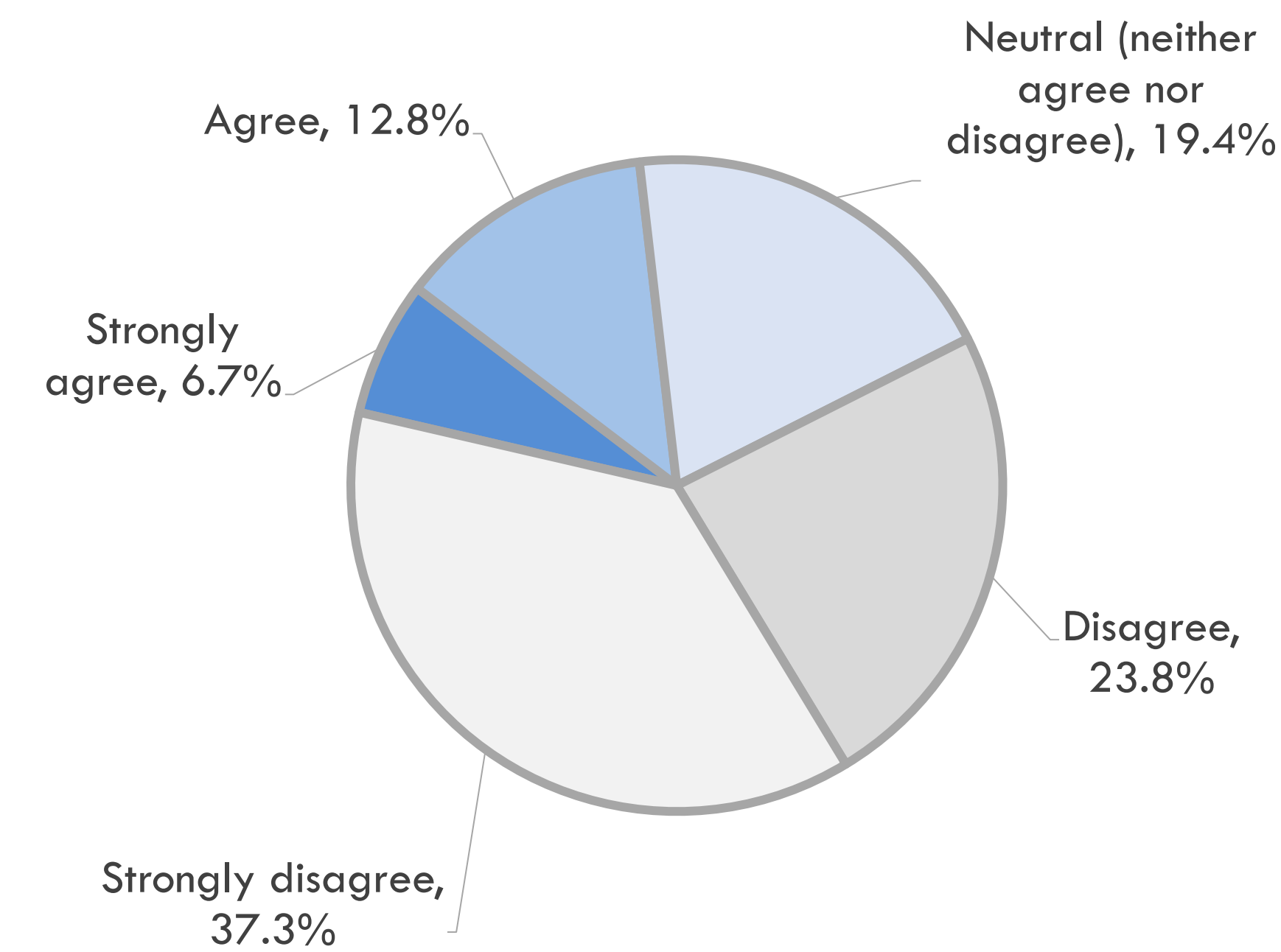
(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)



# EXPECTATIONS FOR THE PANDEMIC'S COURSE AT THE END OF 2020

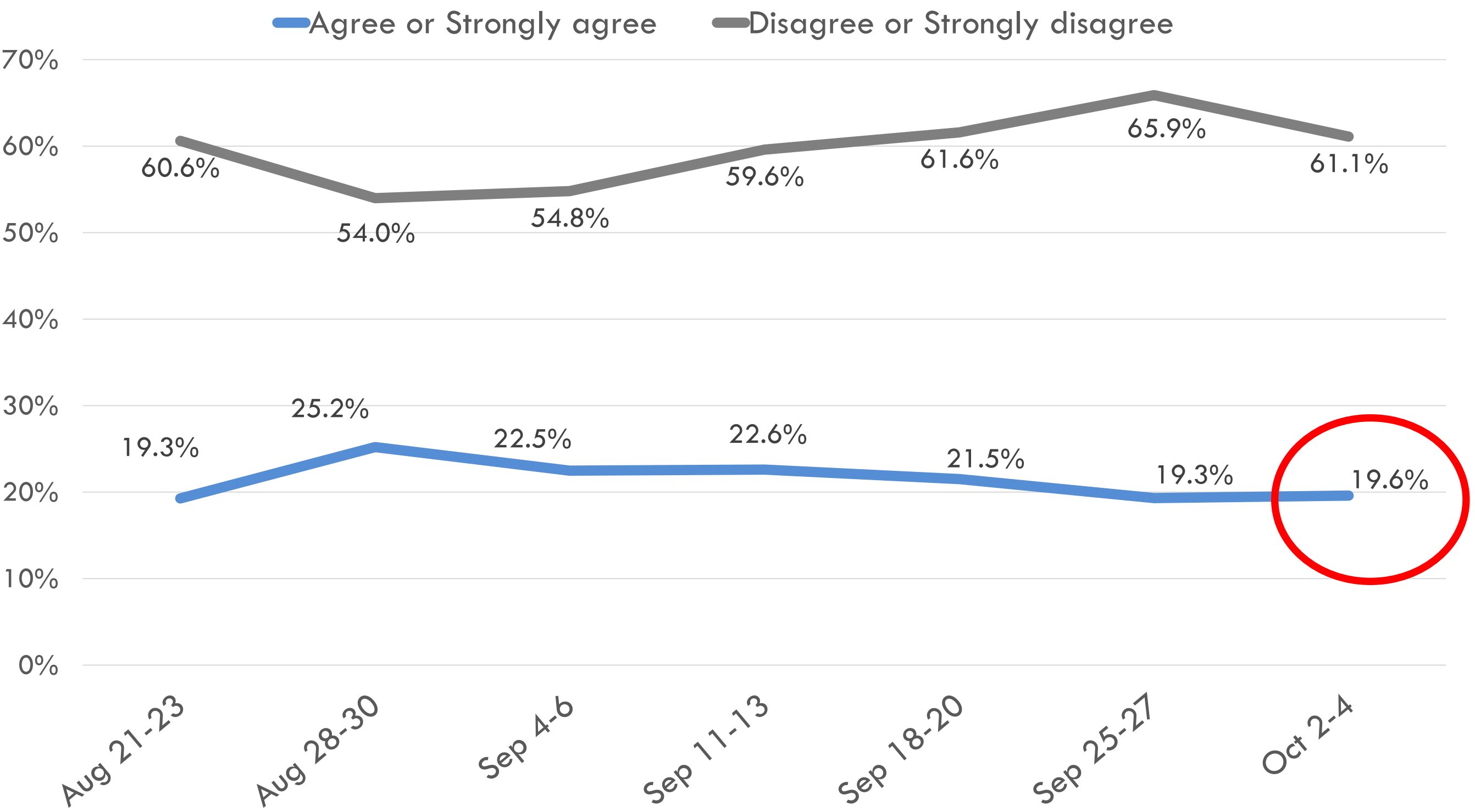
How much do you agree with the following statement?

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



(Base: Waves 24-30. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

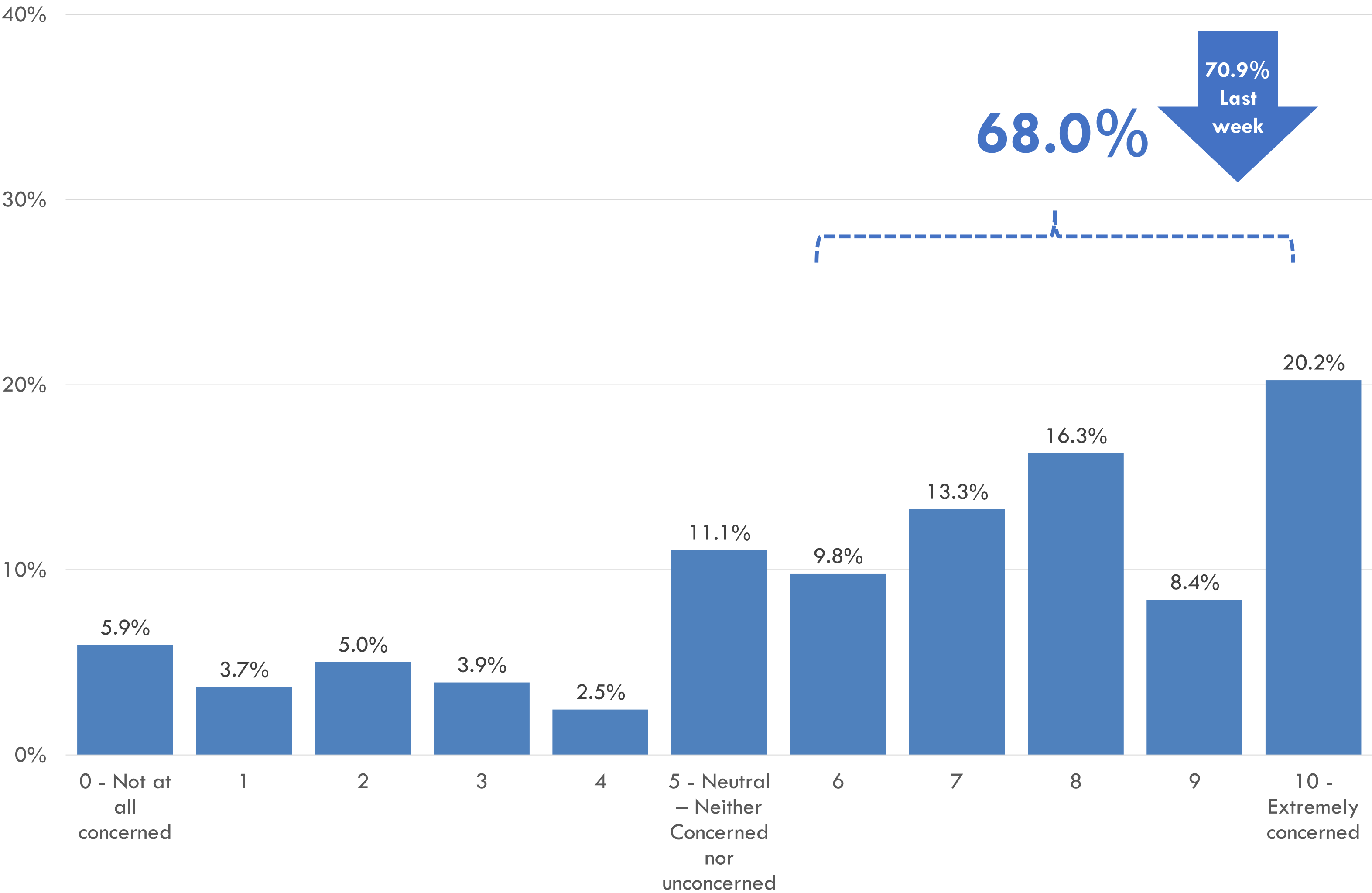
## Historical data



# 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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)



# PERSONAL HEALTH CONCERNS

## MARCH 13 – OCTOBER 4



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



More concern

Less concern

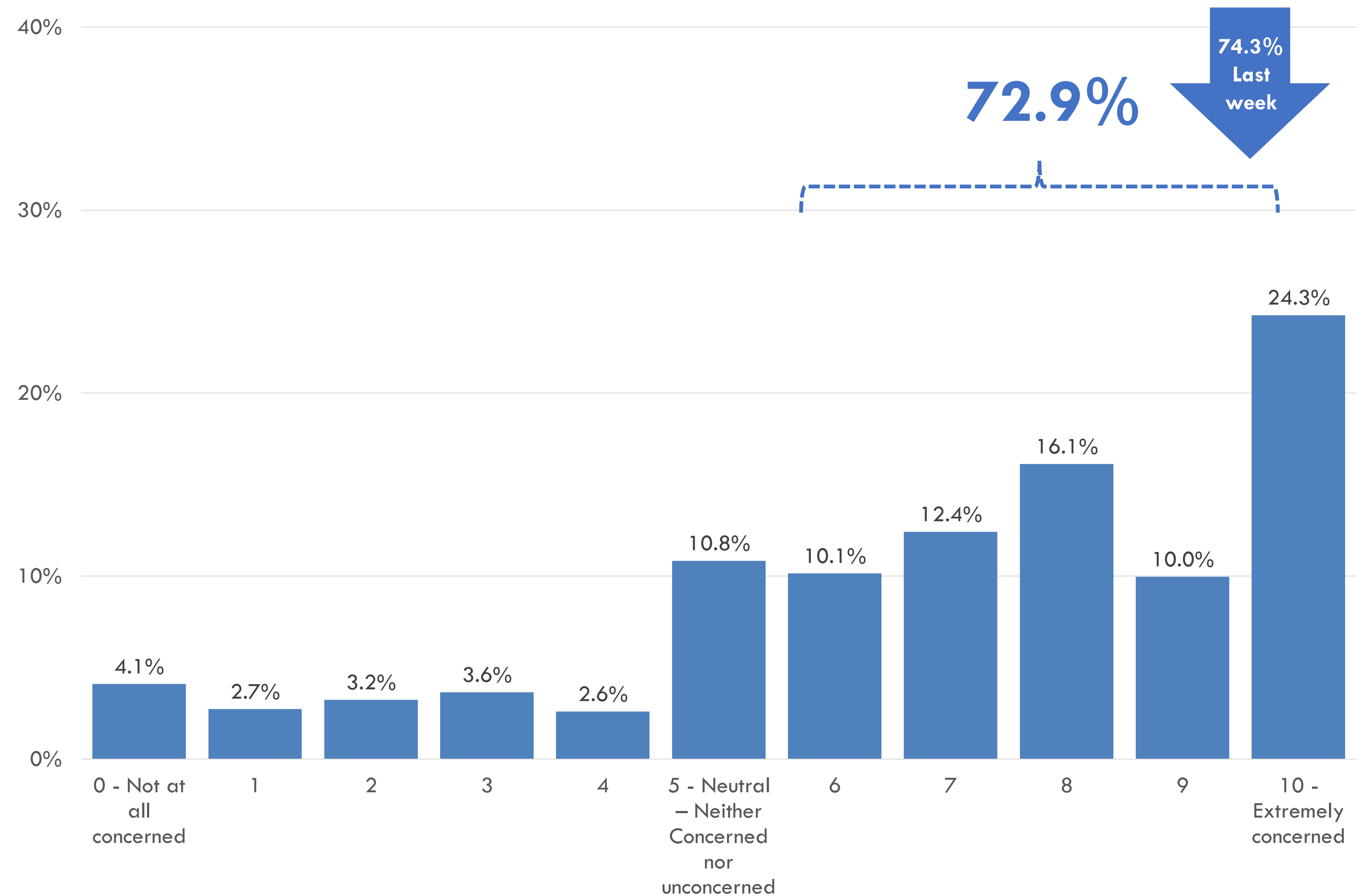
**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?**

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

# HEALTH CONCERNS (FAMILY & FRIENDS)

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

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

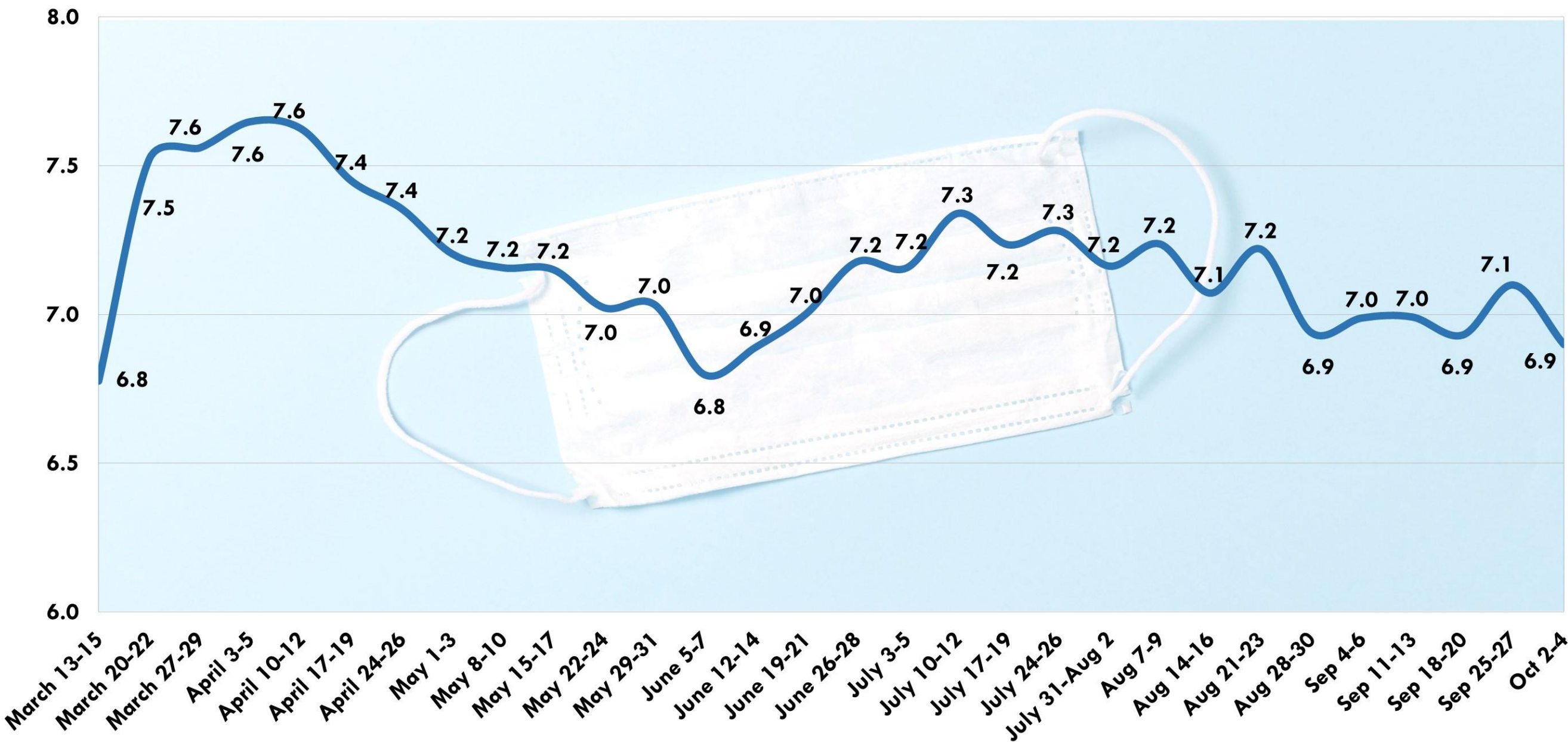


# HEALTH CONCERNS (FAMILY & FRIENDS)

MARCH 13 – OCTOBER 4



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



More concern

Less concern

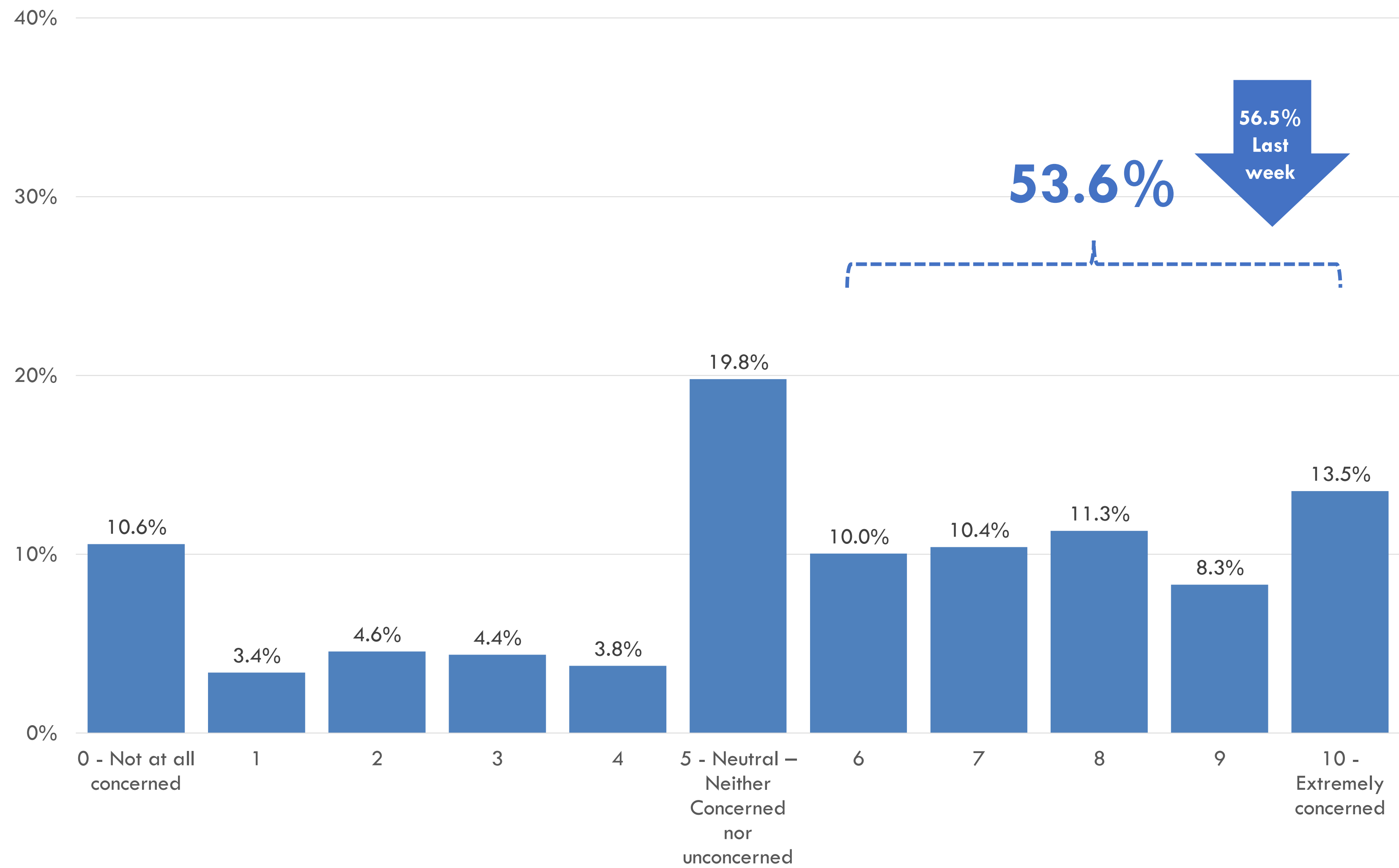
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.

# 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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

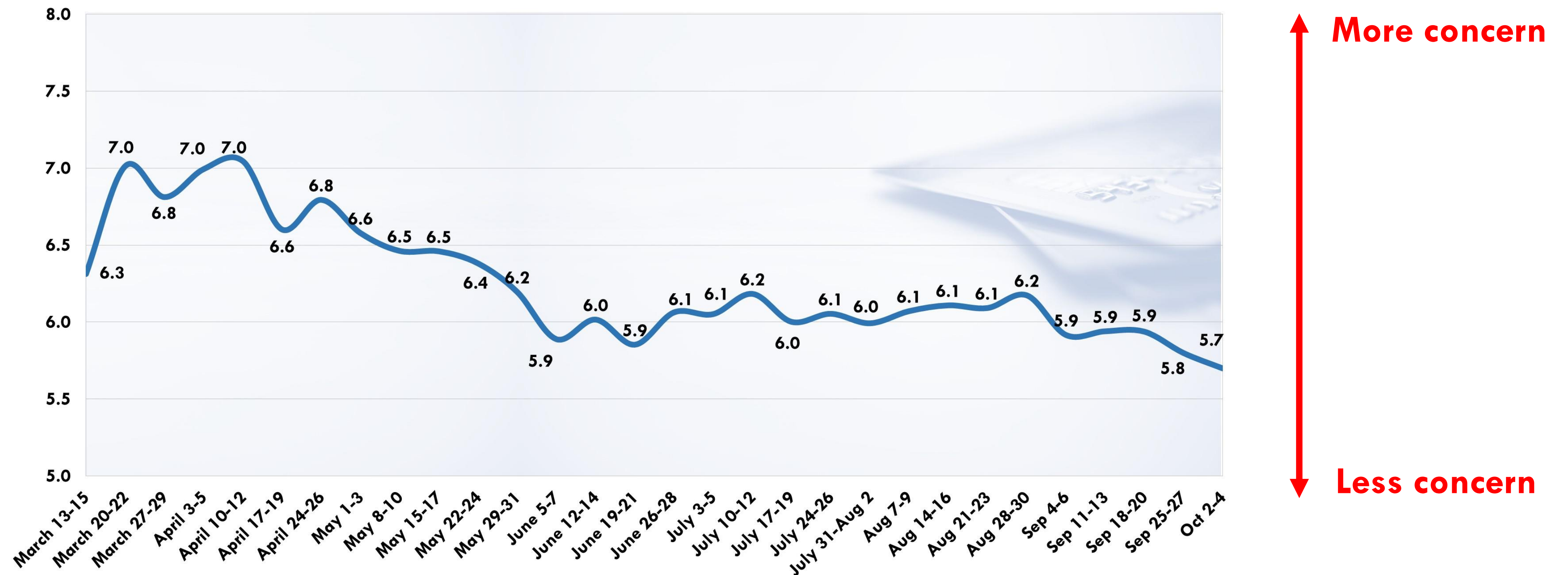


# CONCERNS ABOUT PERSONAL FINANCES

MARCH 13 – OCTOBER 4



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



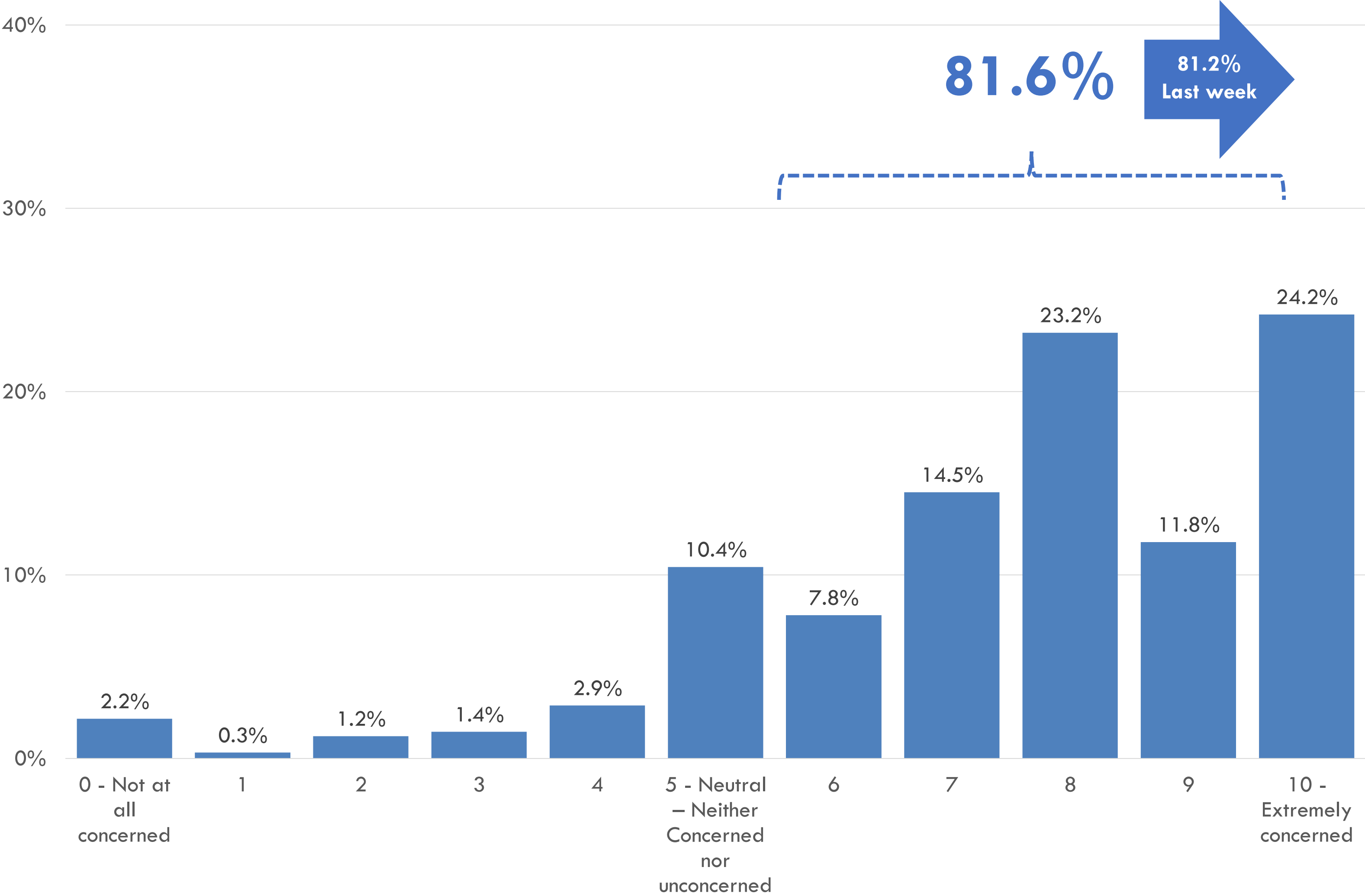
**QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON YOUR PERSONAL FINANCES?**

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.

# 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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

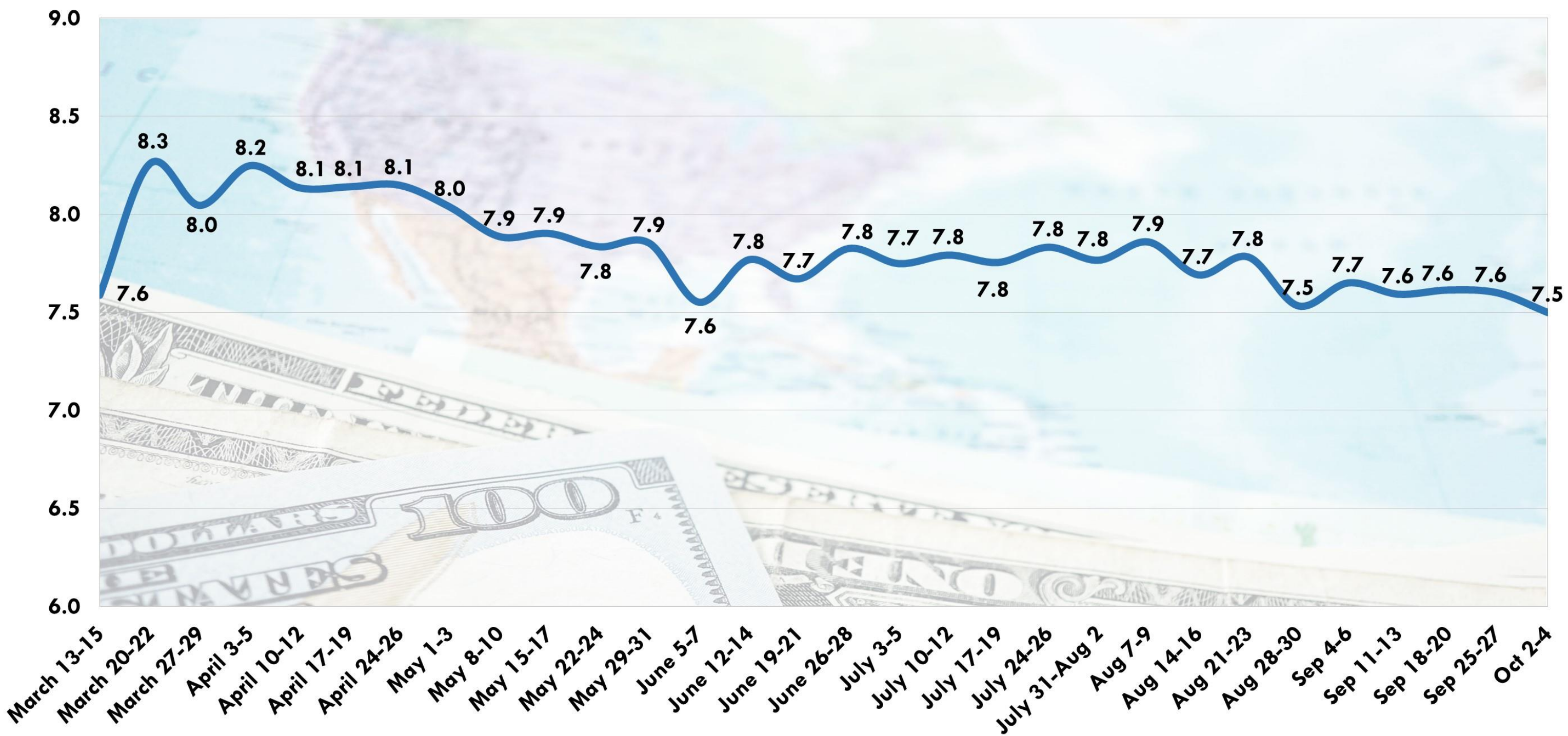


# CONCERNS ABOUT NATIONAL ECONOMY

## MARCH 13 – OCTOBER 4



CONCERNED ABOUT NATIONAL ECONOMY (AVERAGE SCORE ON AN 11-POINT SCALE)



↑ More concern

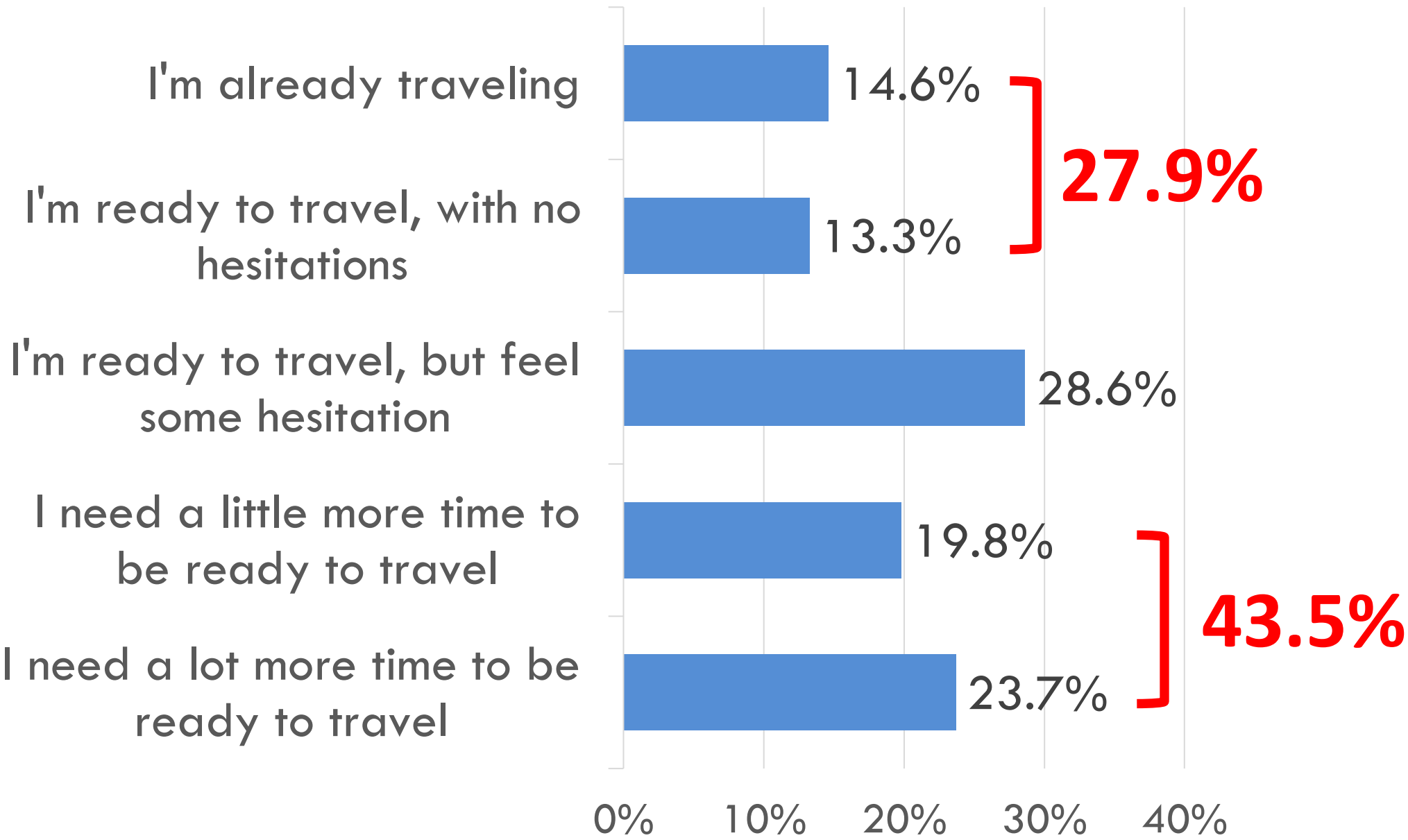
↓ Less concern

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

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.

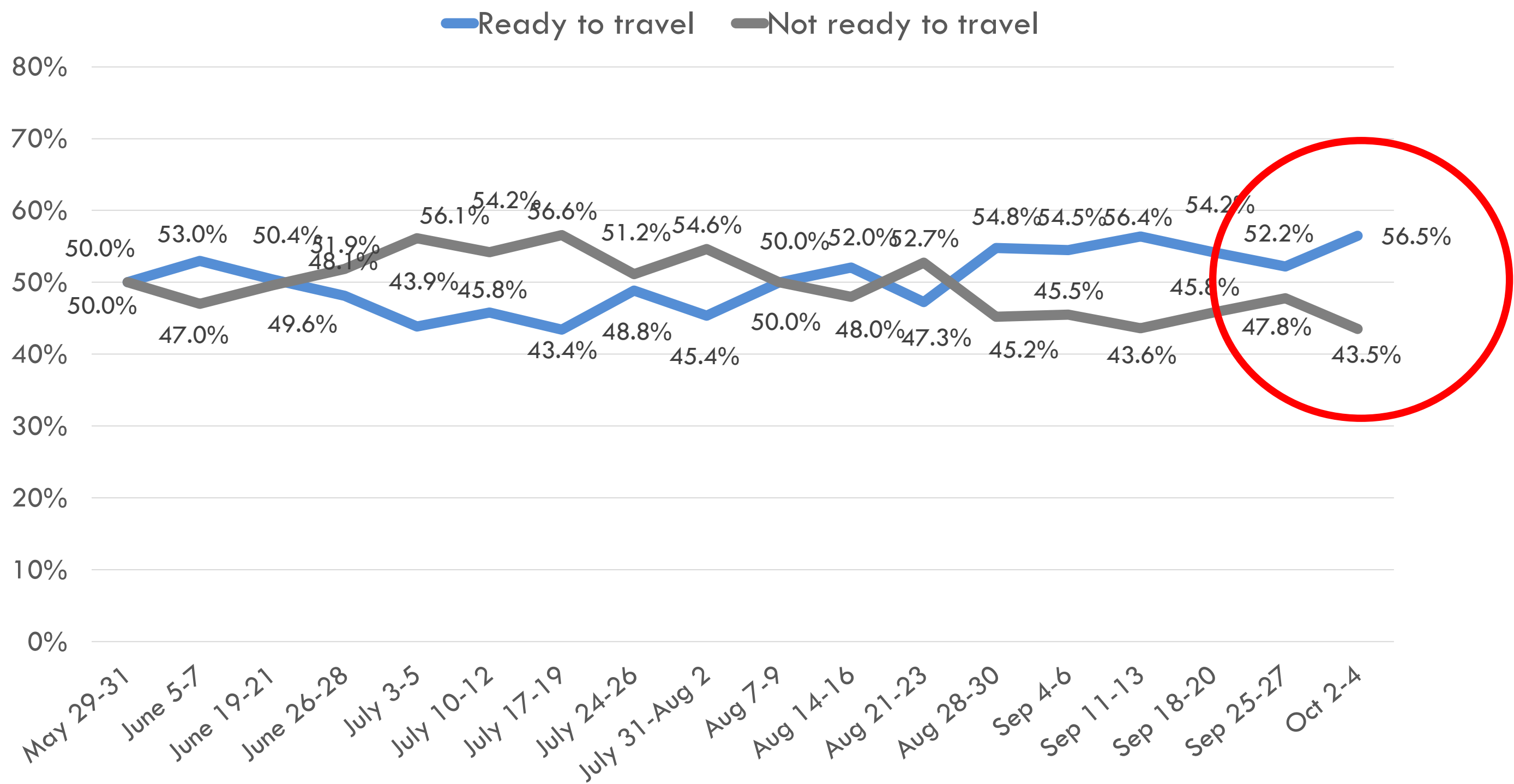
# TRAVEL STATE-OF-MIND

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



(Base: Waves 12-13 and 15-30. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

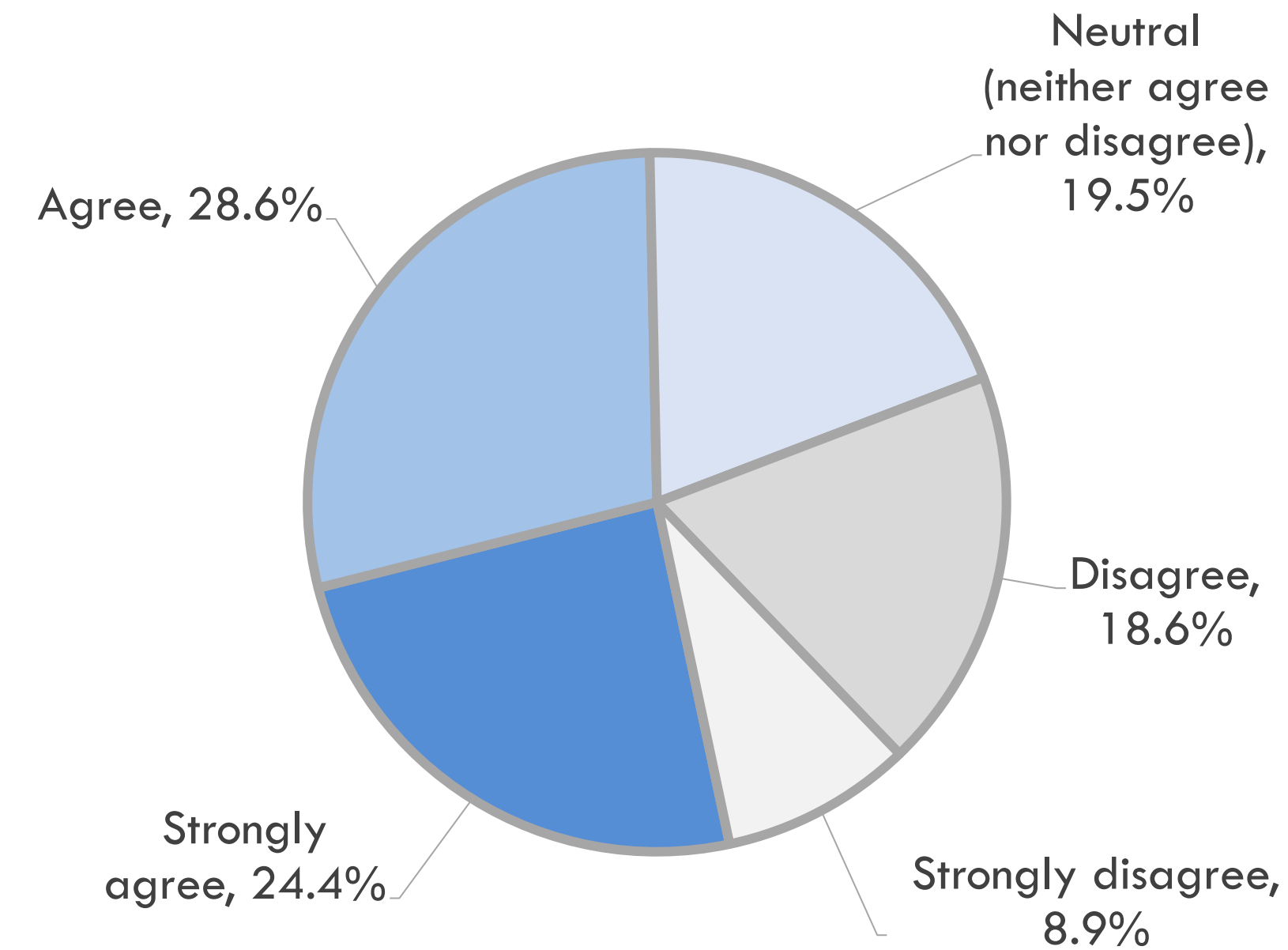
Historical data



# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

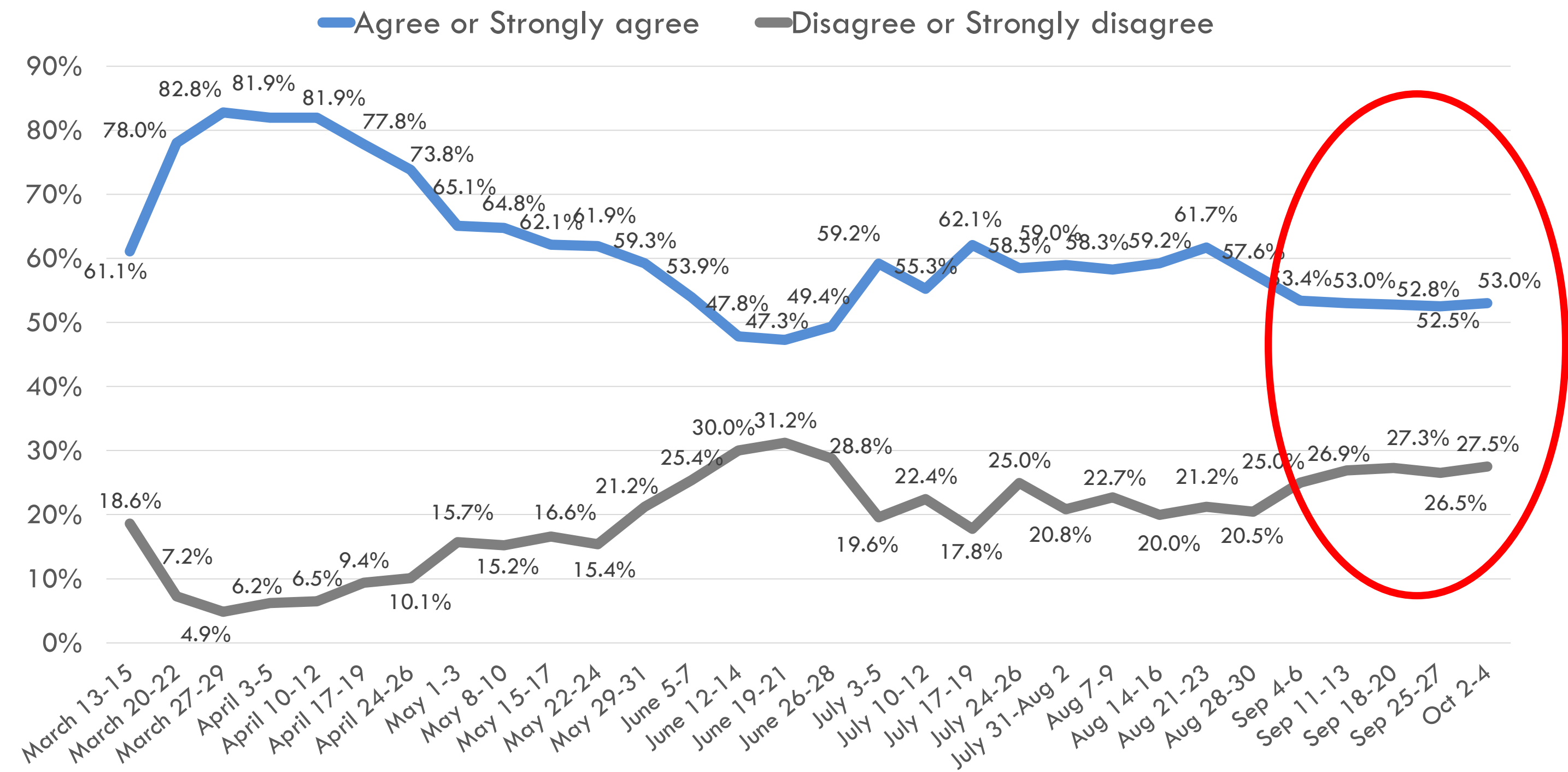
How much do you agree with the following statement?

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



(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

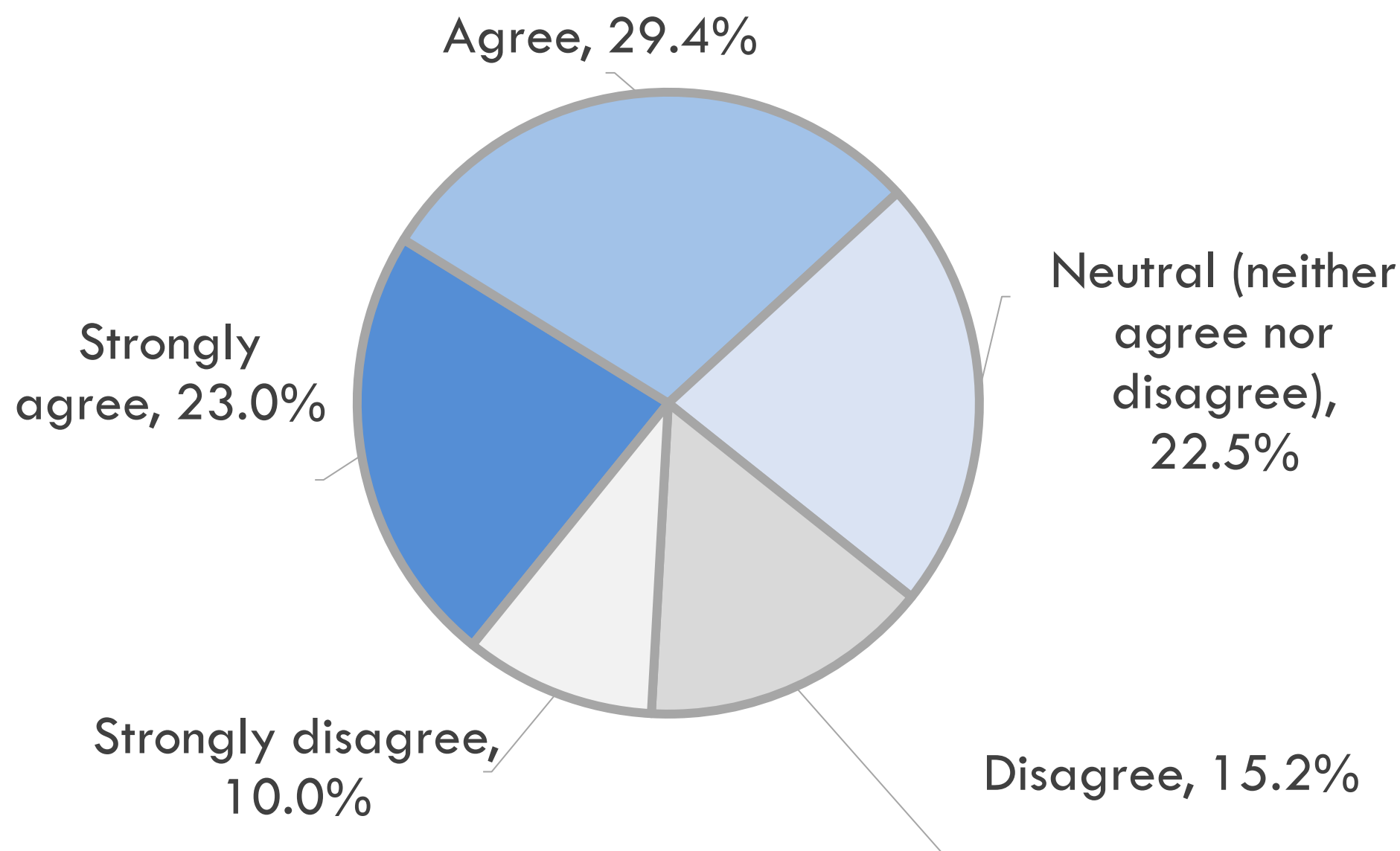
## Historical data



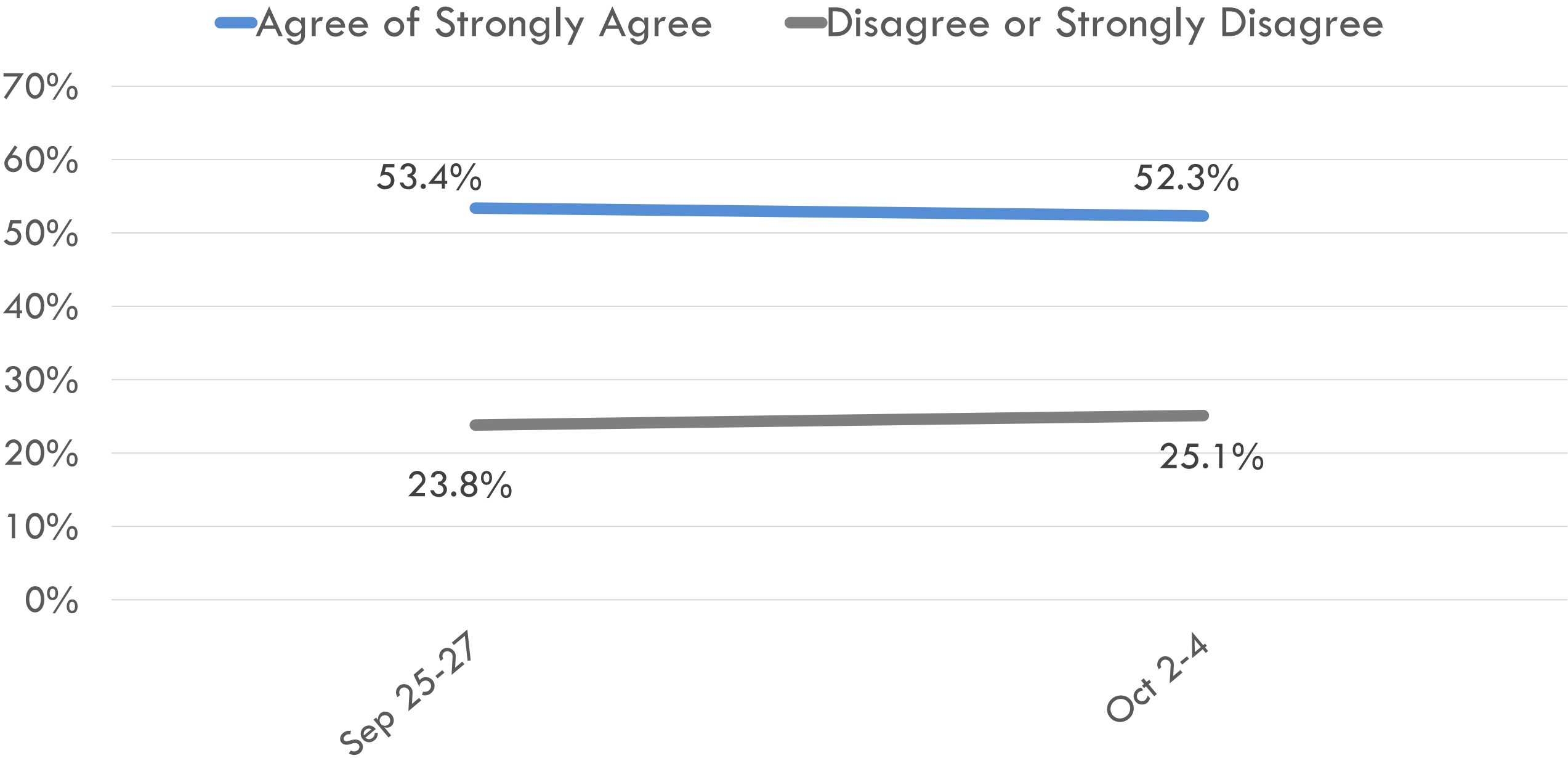
# TRAVEL AS AN ESSENTIAL NEED ONLY

How much do you agree with the following statement?

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



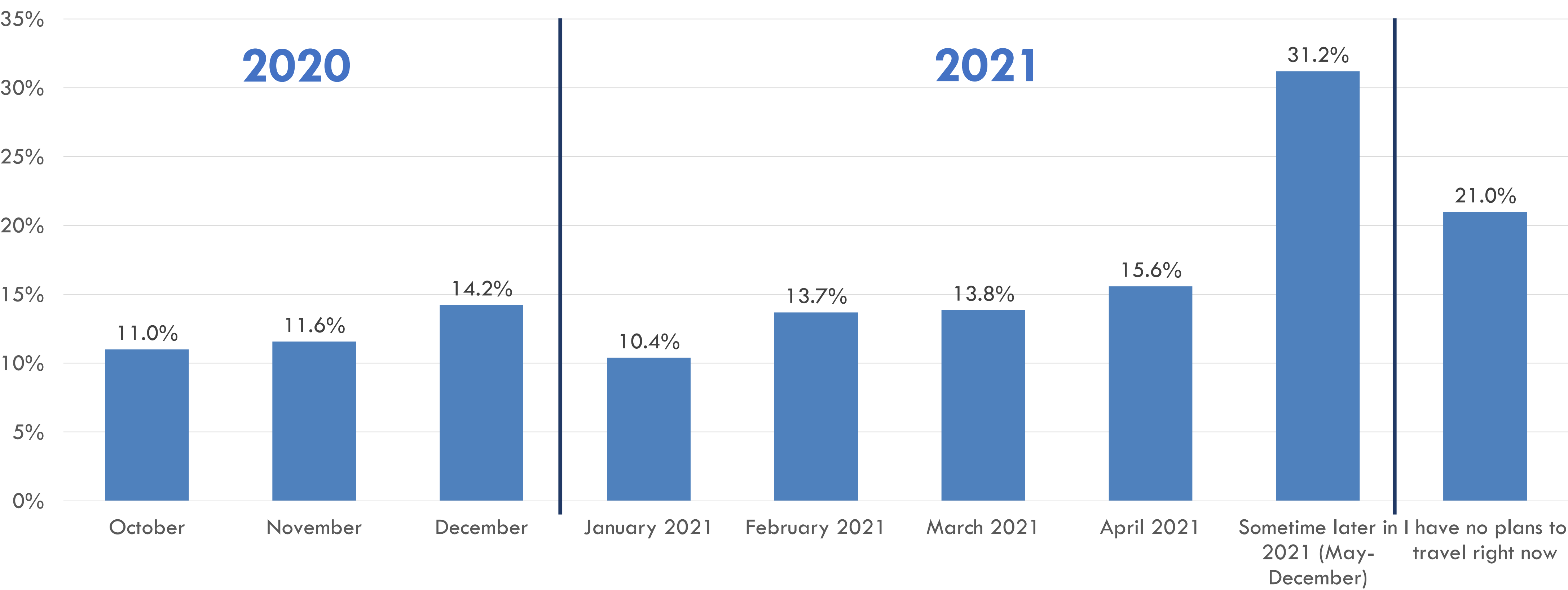
## Historical data



(Base: Waves 29 and 30 data. All respondents, 1,205 and 1,203 completed surveys.)

# UPCOMING TRAVEL PLANS

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

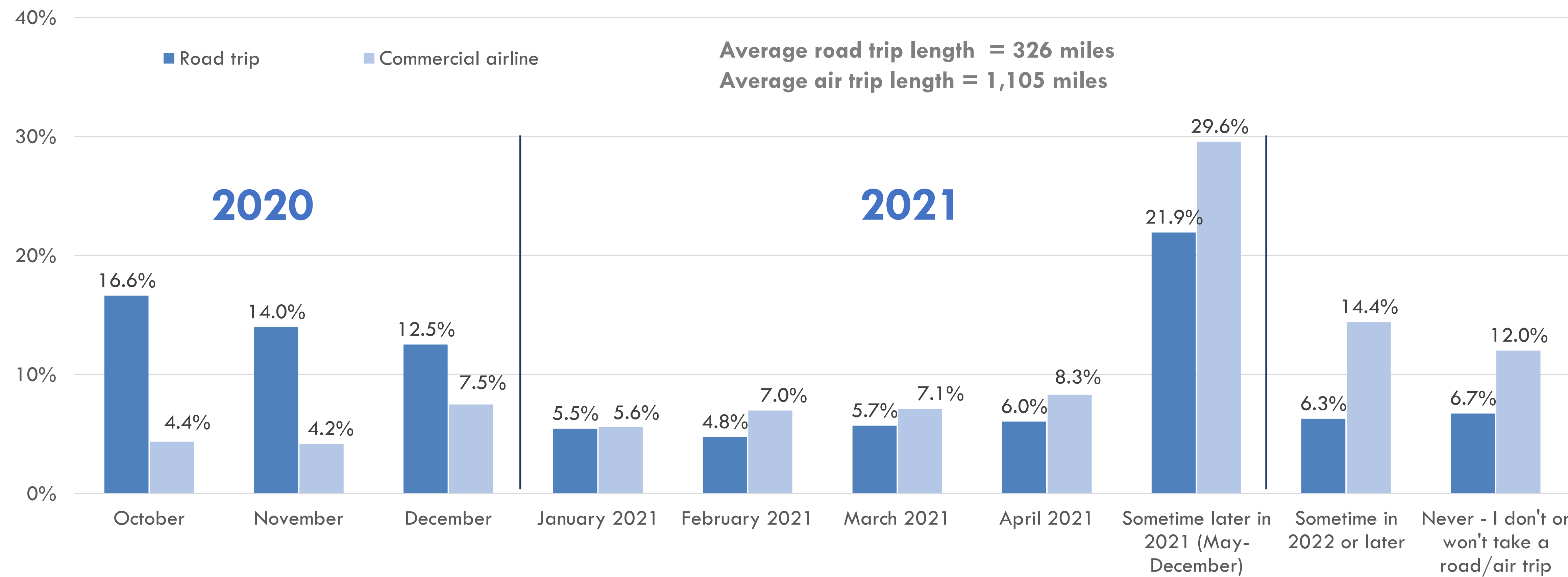


(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

# NEXT ROAD & AIR TRIPS EXPECTED

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

**Question:** In what month do you expect you will take your NEXT TRIP on a commercial airline?

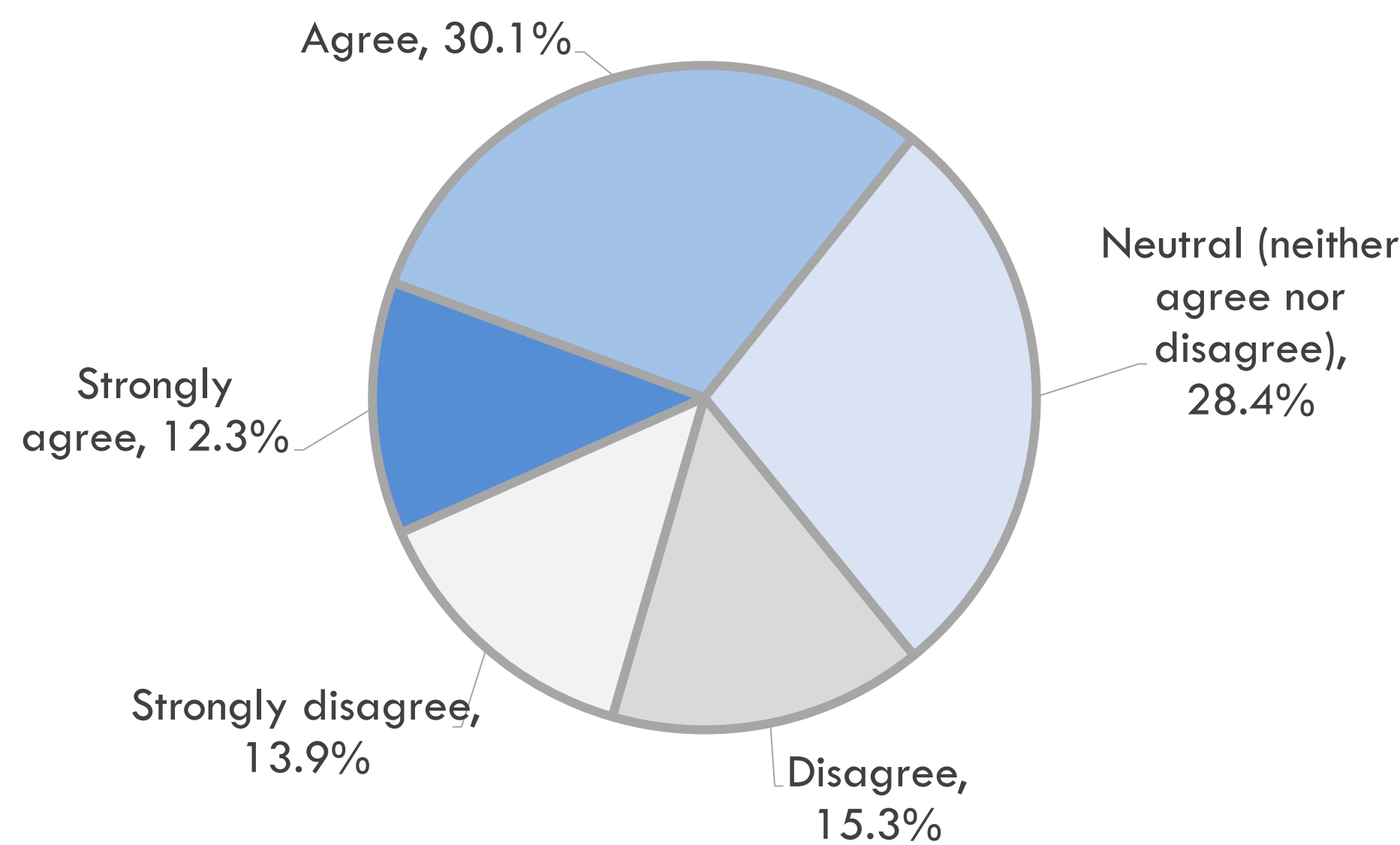


(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

# DISCOUNTS AND PRICE CUTS

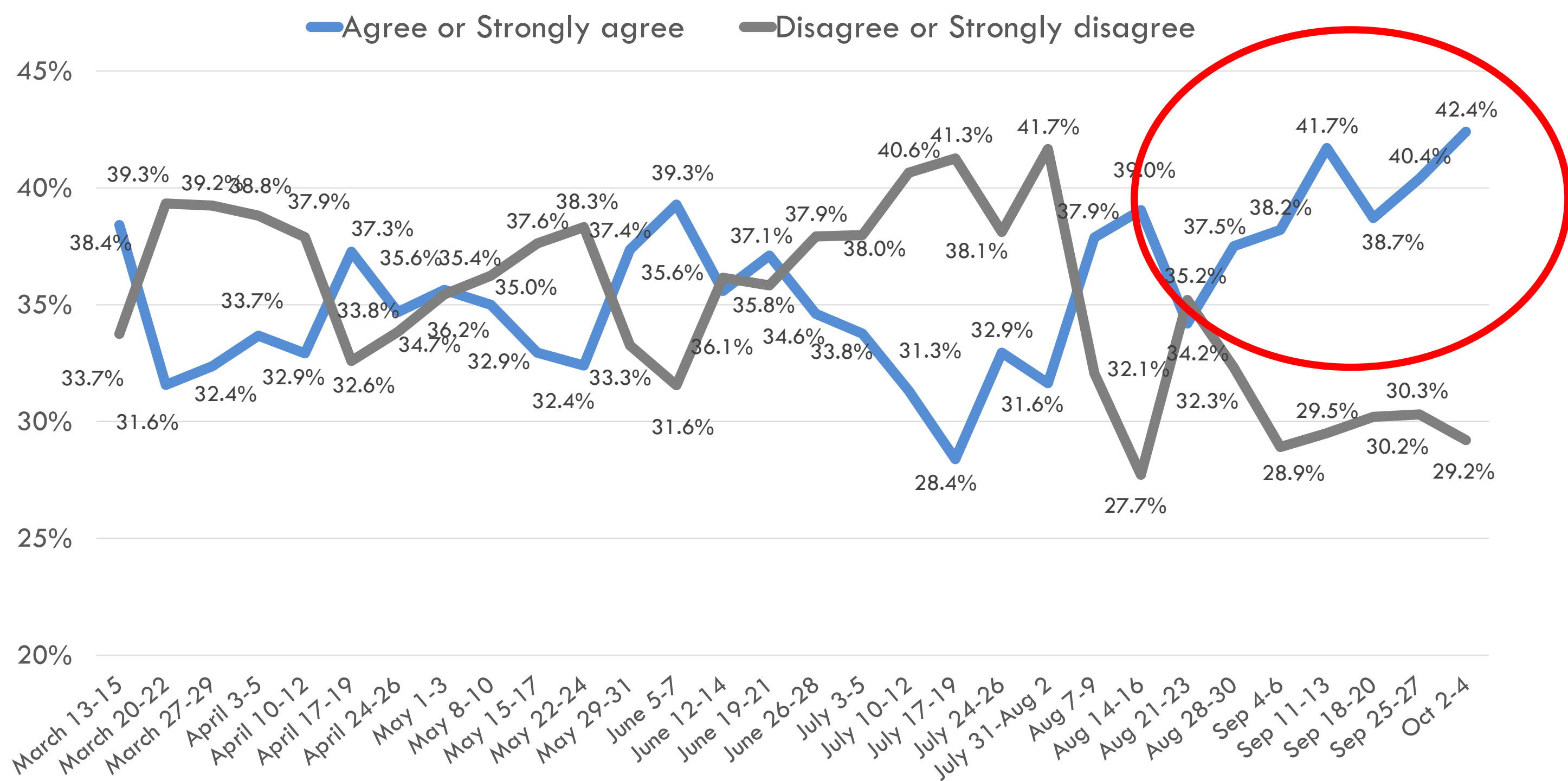
How much do you agree with the following statement?

**Statement:** The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.



(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

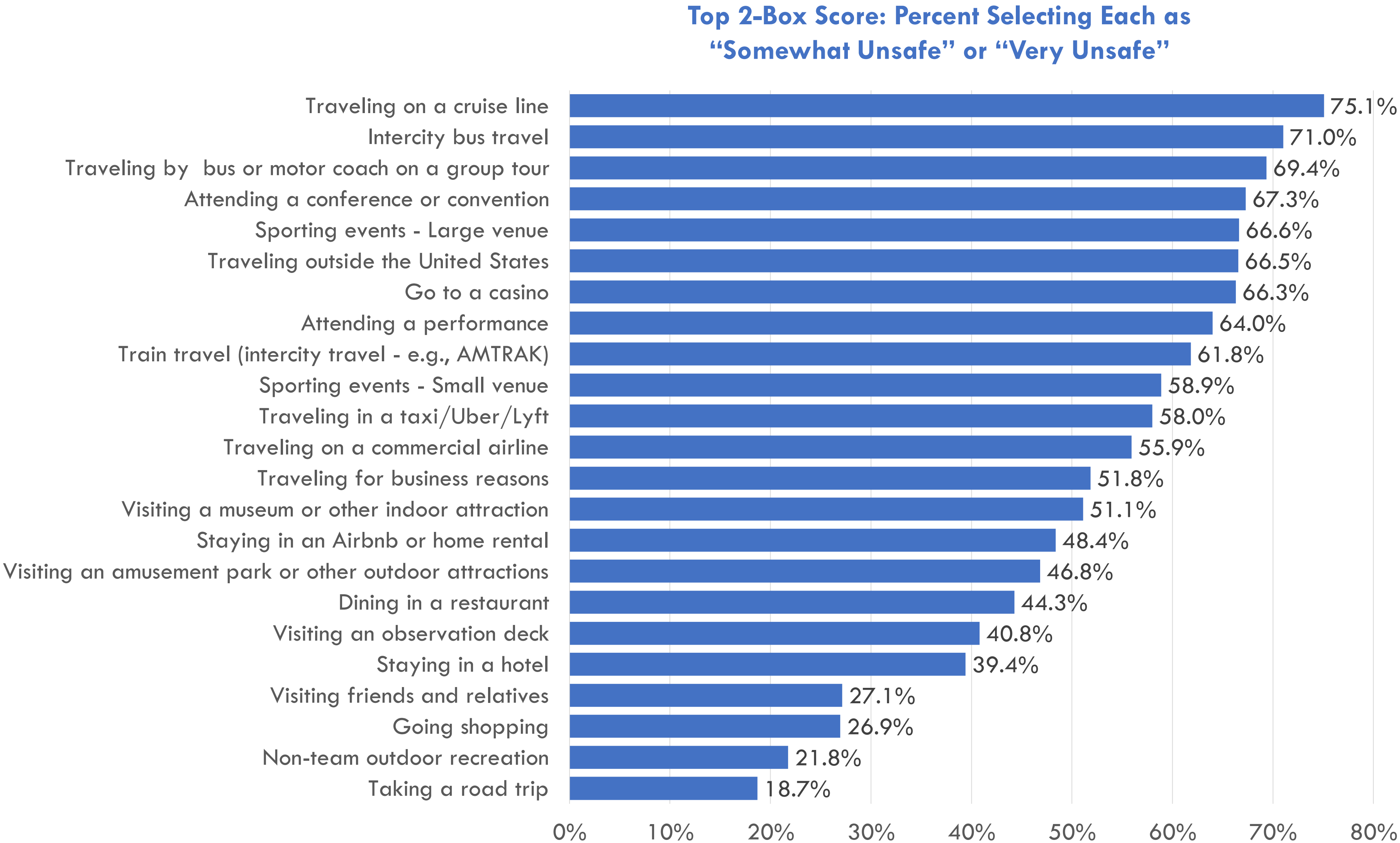
Historical data



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 30)

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

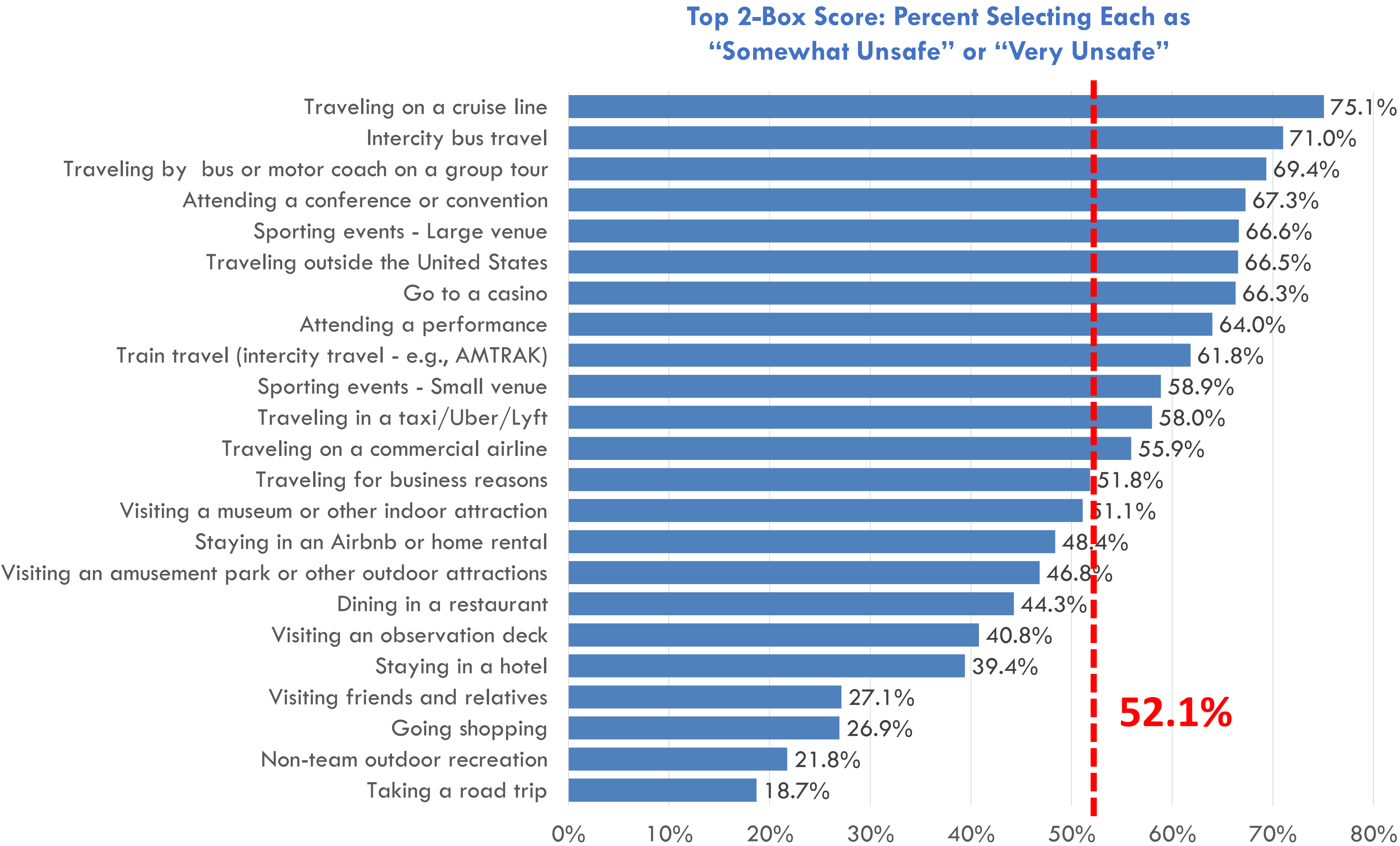
(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 30)

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

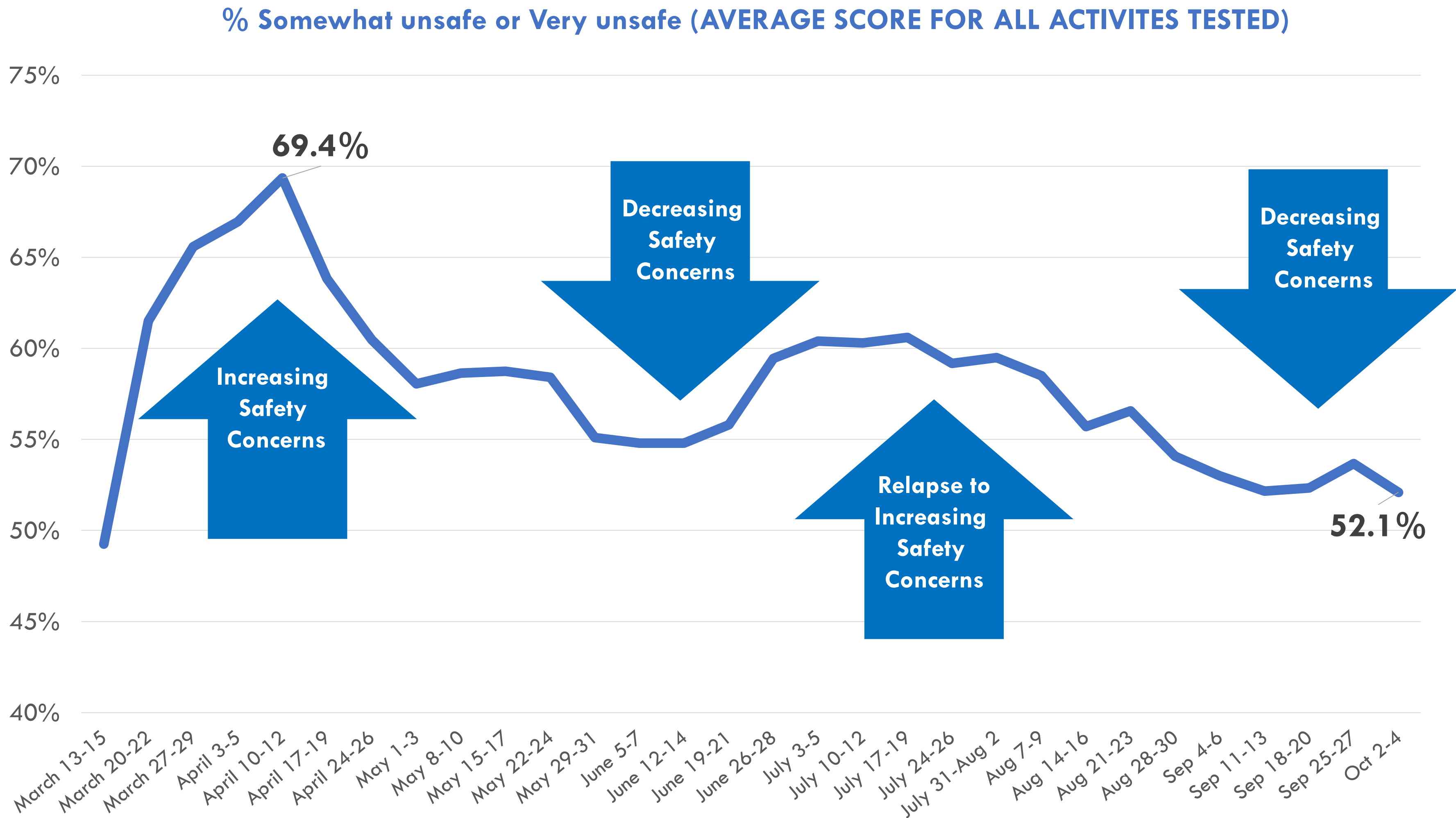
(Base: Wave 30 data. All respondents, 1,203 completed surveys.  
Data collected Oct 2-4, 2020)



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-30 COMPARISON)

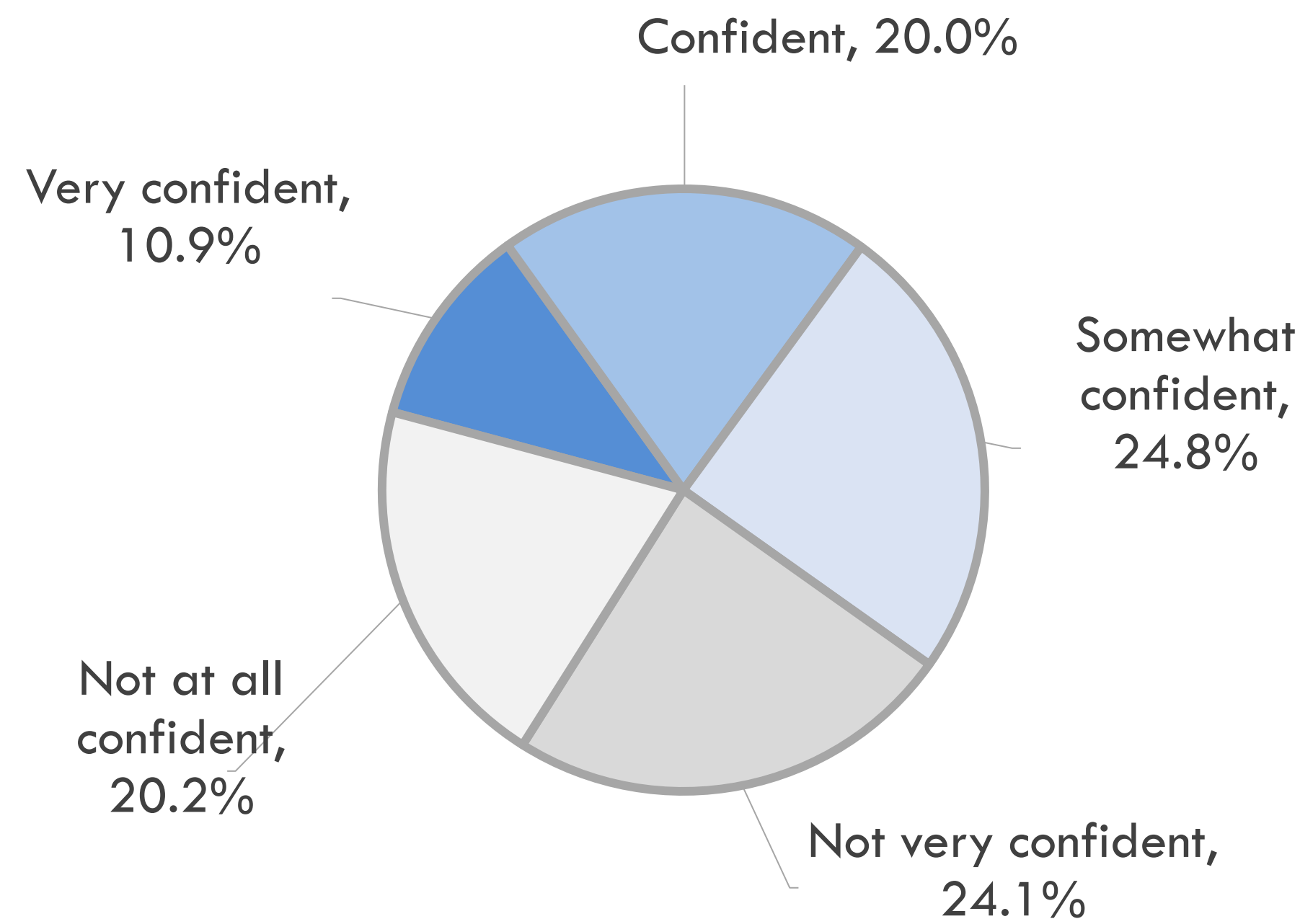
**Question:** At this moment, how safe would you feel doing each type of travel activity?

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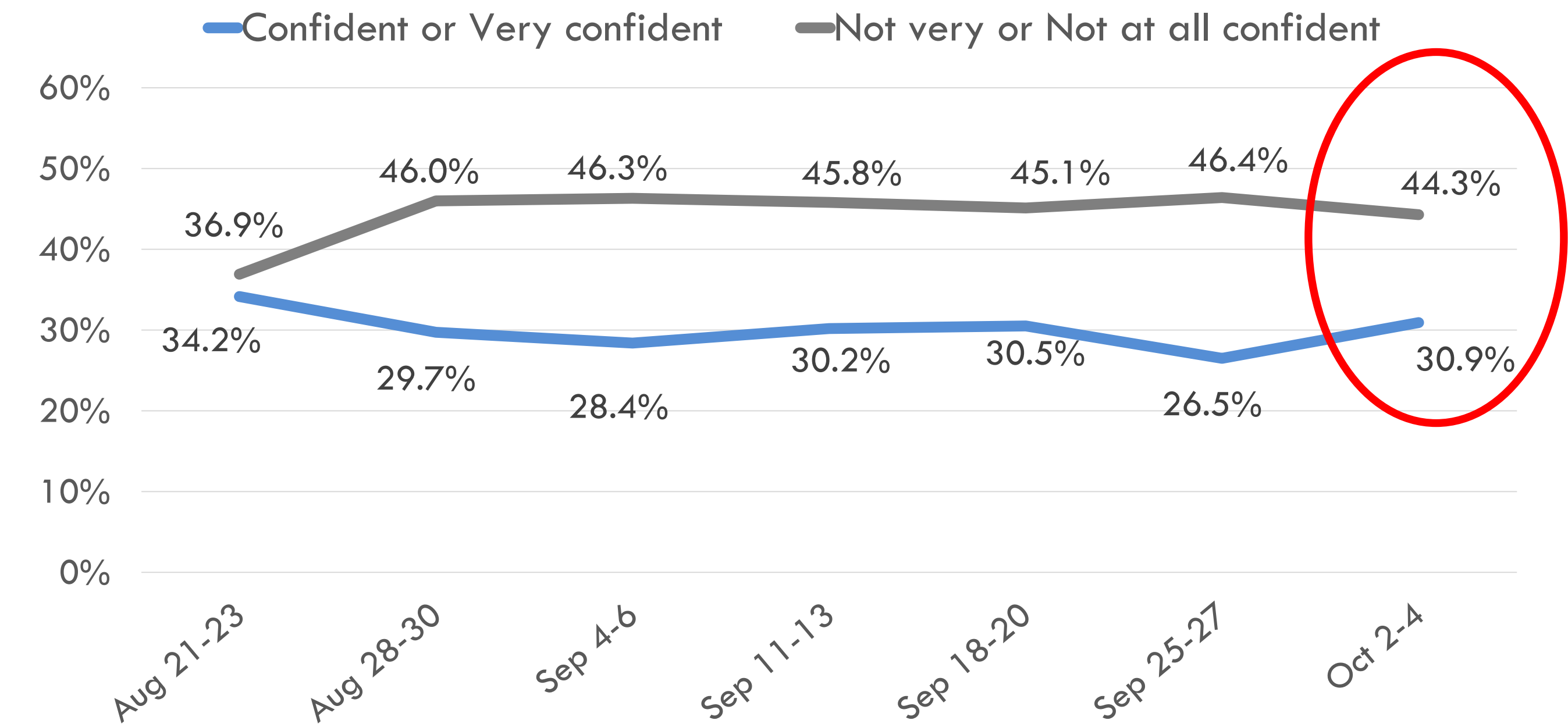
# CONFIDENCE IN TRAVELING SAFELY

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



(Base: Wave 24-30 data. All respondents, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

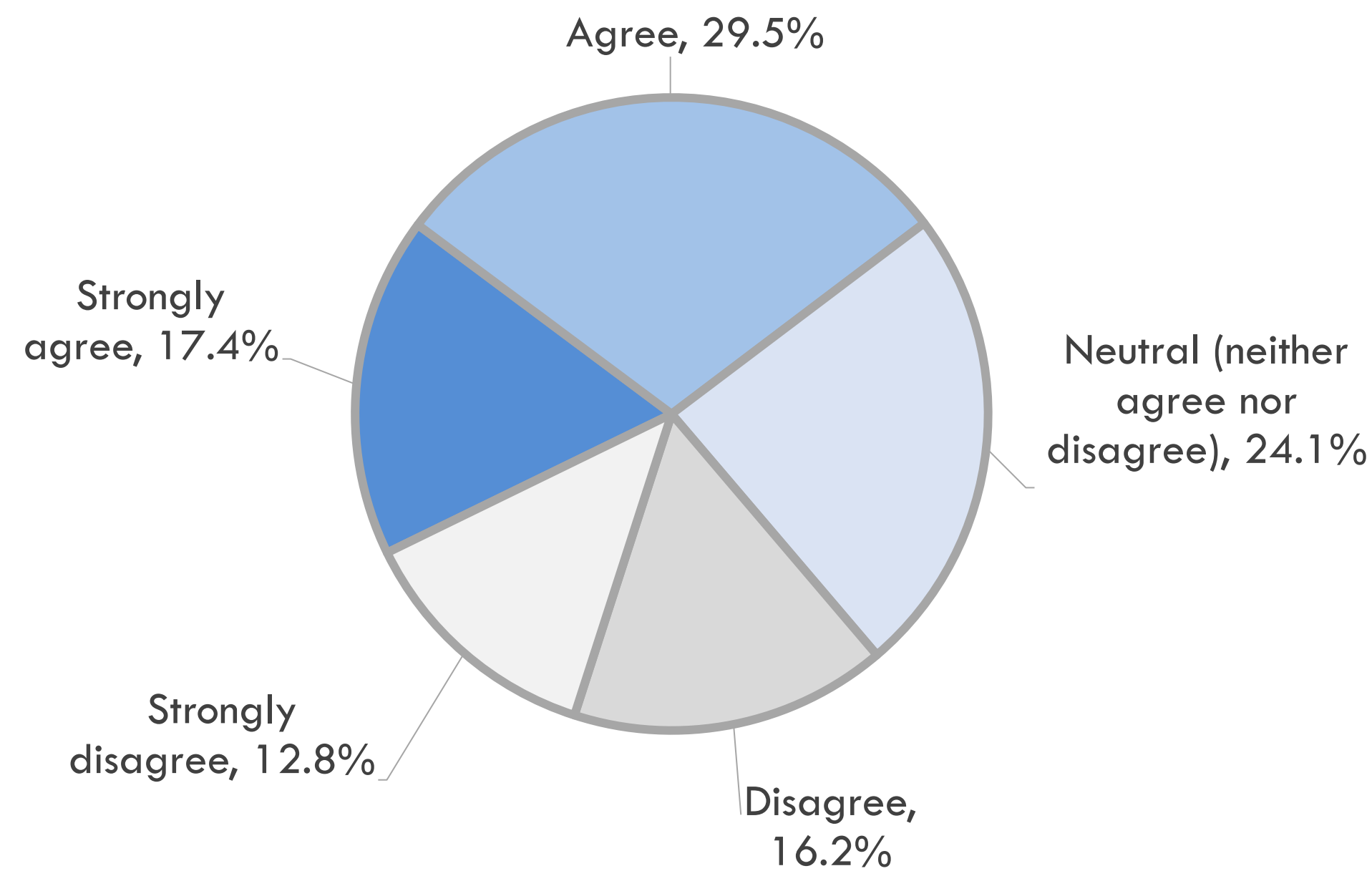
## Historical data



# COMFORT ENJOYING HOME COMMUNITY

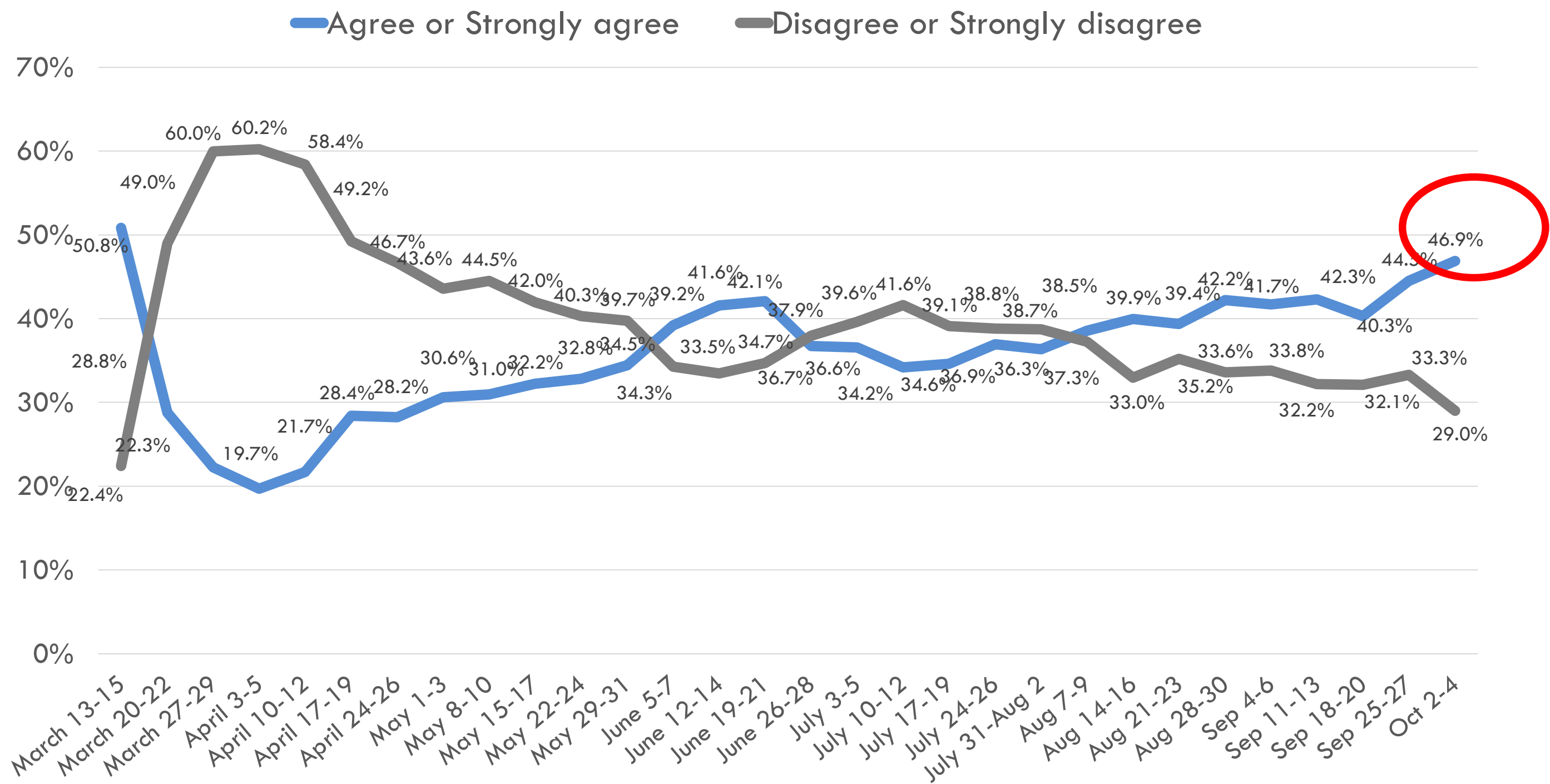
How much do you agree with the following statement?

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



(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

## Historical data

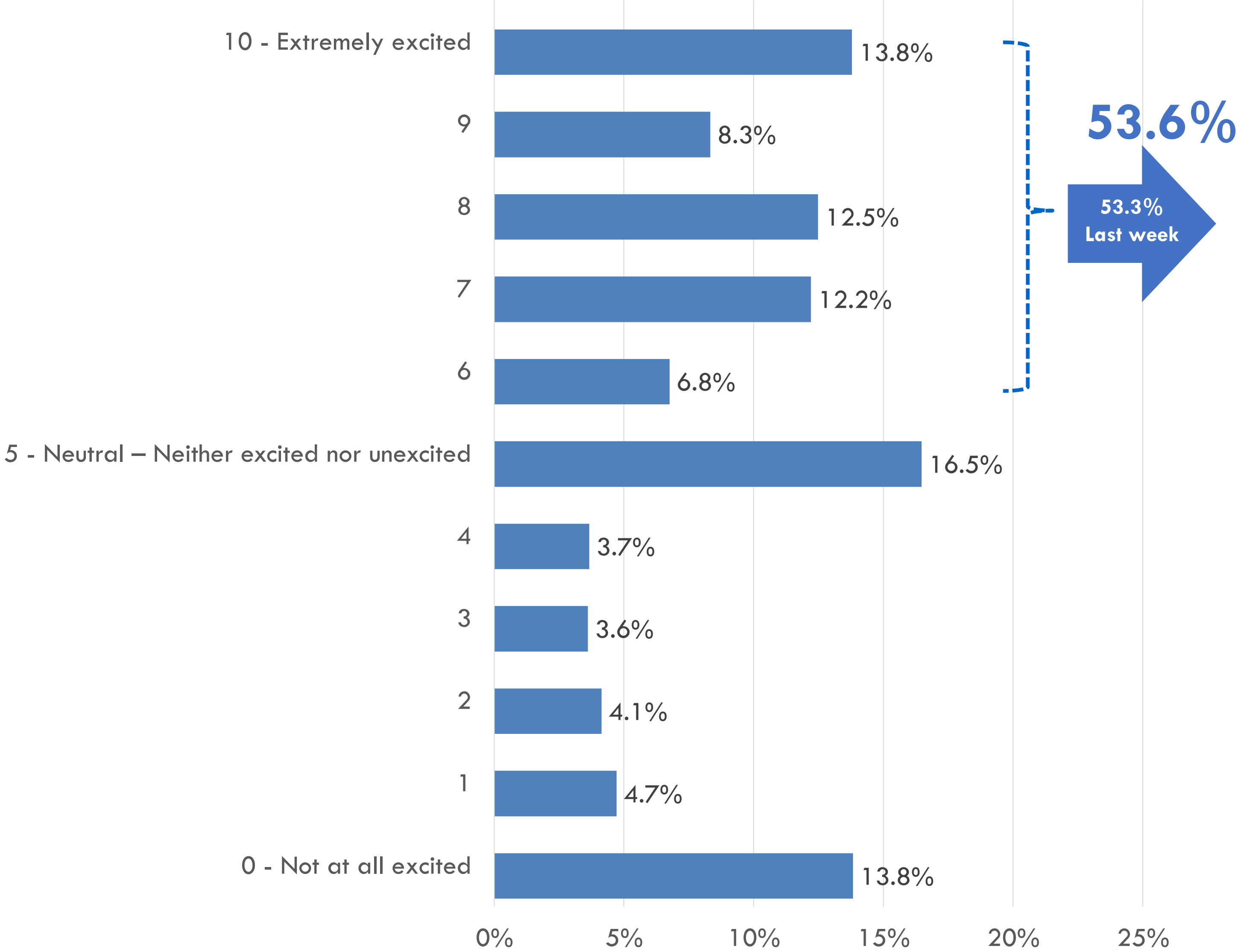


# EXCITEMENT TO TRAVEL NOW

**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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)*

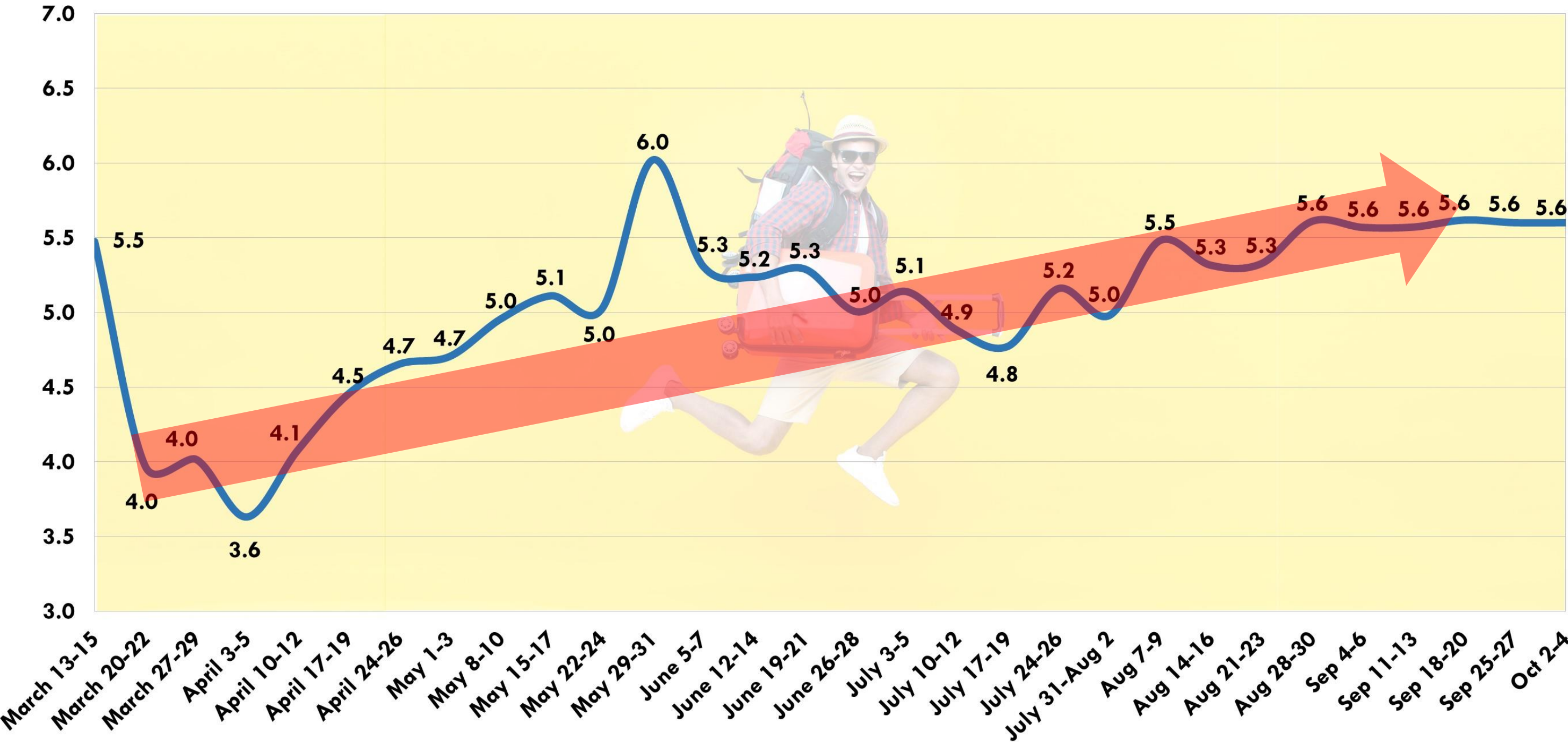


# EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – OCTOBER 4



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



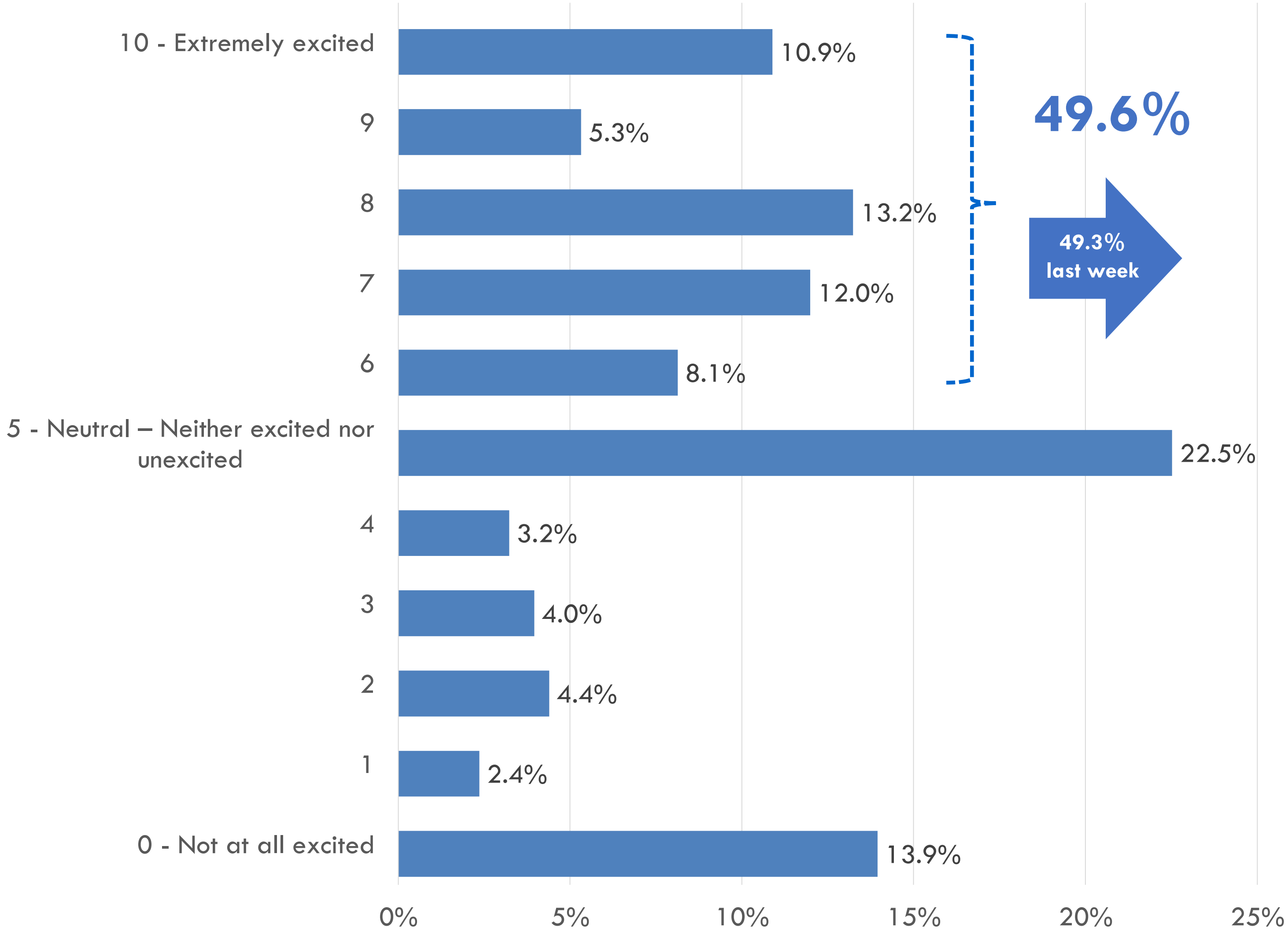
**QUESTION:** IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

# 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 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

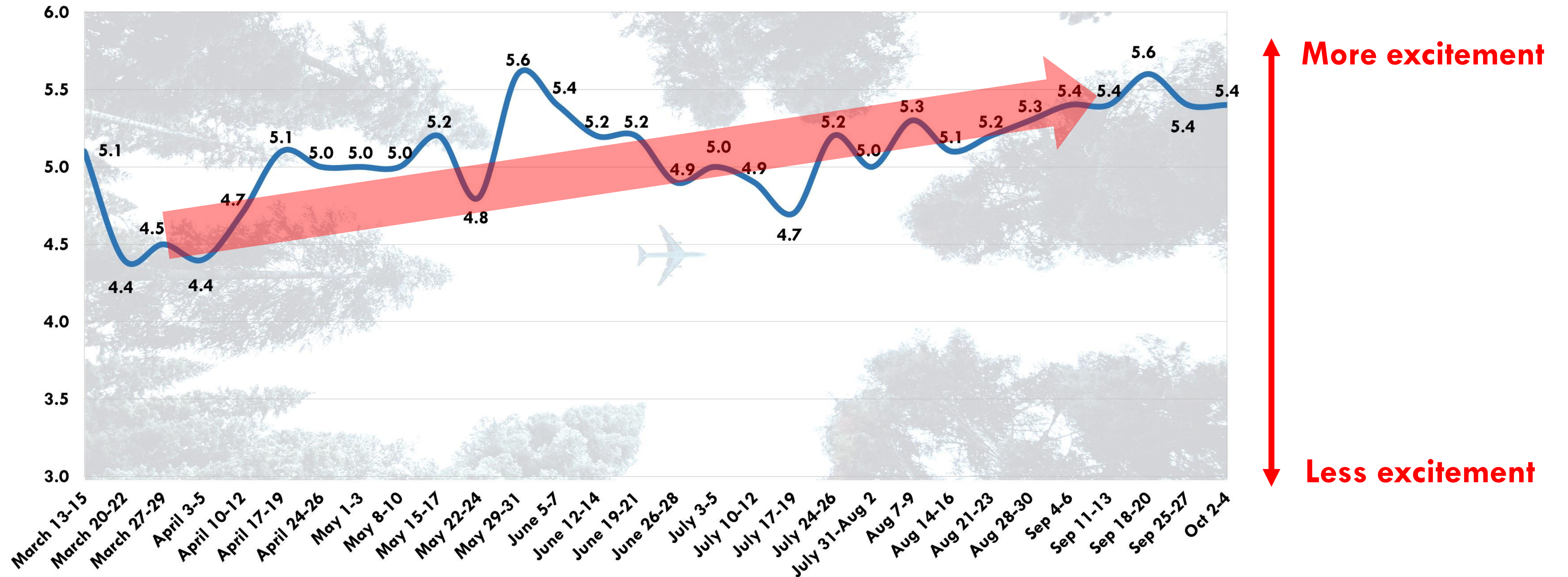


# OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – OCTOBER 4



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



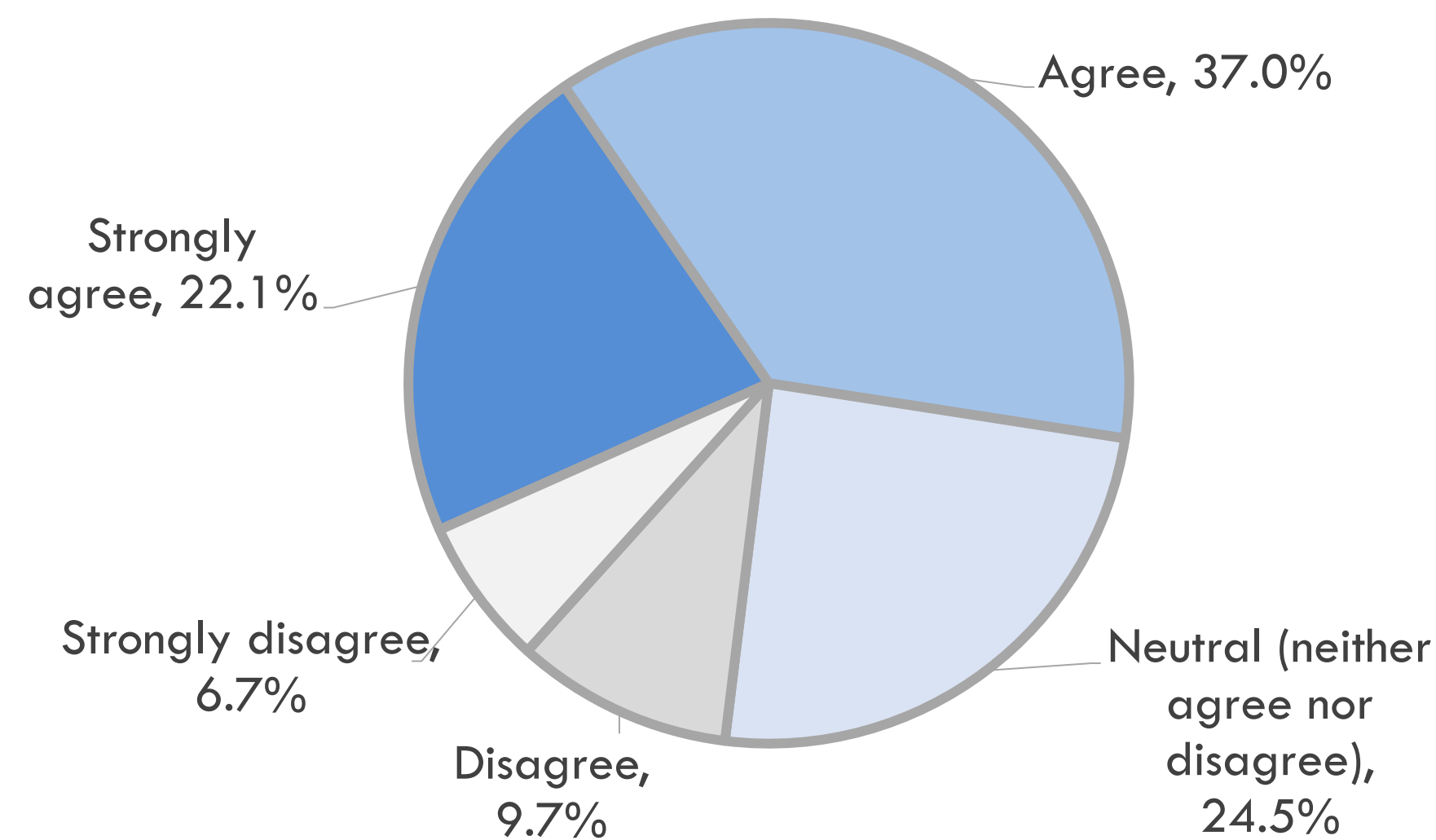
**QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?**

(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

# HAPPINESS PLANNING A VACATION WITHIN NEXT 6 MONTHS

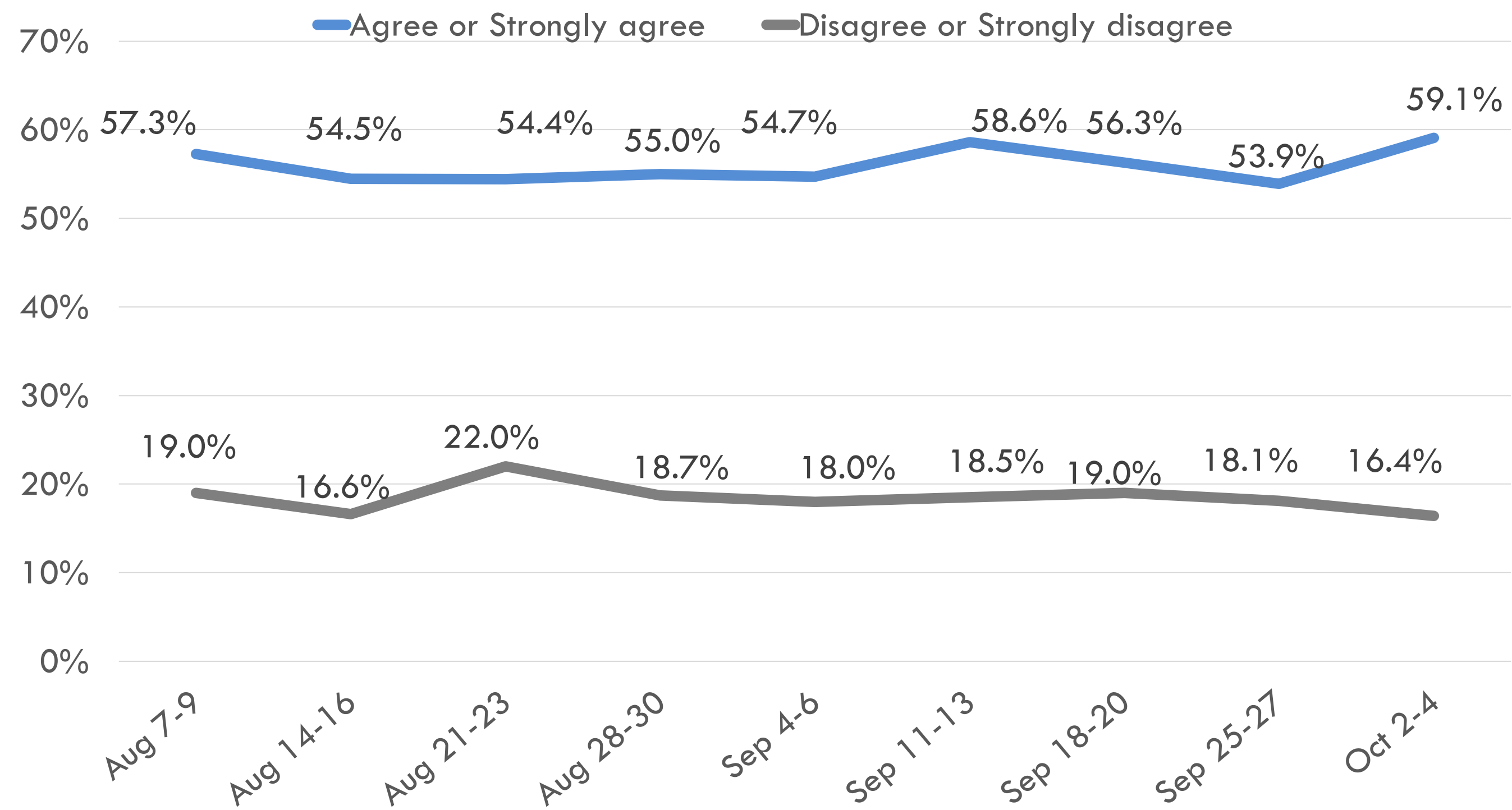
How much do you agree with the following statement?

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



(Base: Waves 22-30. All respondents, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

## Historical data





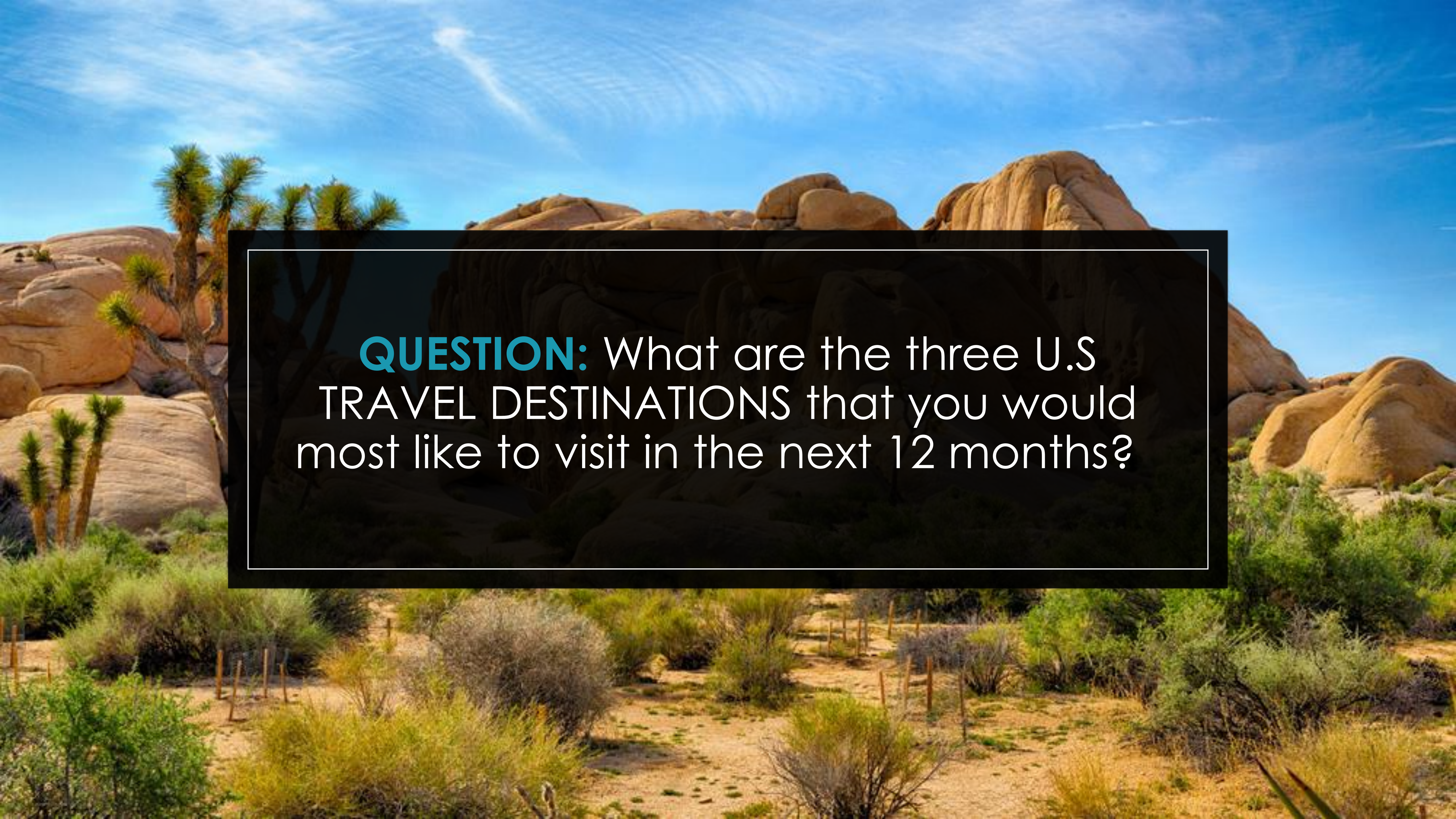
# KEY TAKEAWAYS

- Despite growing pessimism and recent events American travelers' health and financial concerns continue to decrease
- Americans' perceptions of travel's safety, their confidence in traveling safely and their readiness to travel continue to improve. Nearly 80% have at least tentative trip plans
- Discounts and price cuts can motivate travel more so than any other time in the pandemic thus far
- Planning a vacation and having a scheduled vacation brings happiness to many



# TRAVELER INTERESTS

*Next 12 months*



**QUESTION:** What are the three U.S  
TRAVEL DESTINATIONS that you would  
most like to visit in the next 12 months?

# Destination Hotlist: Domestic

---

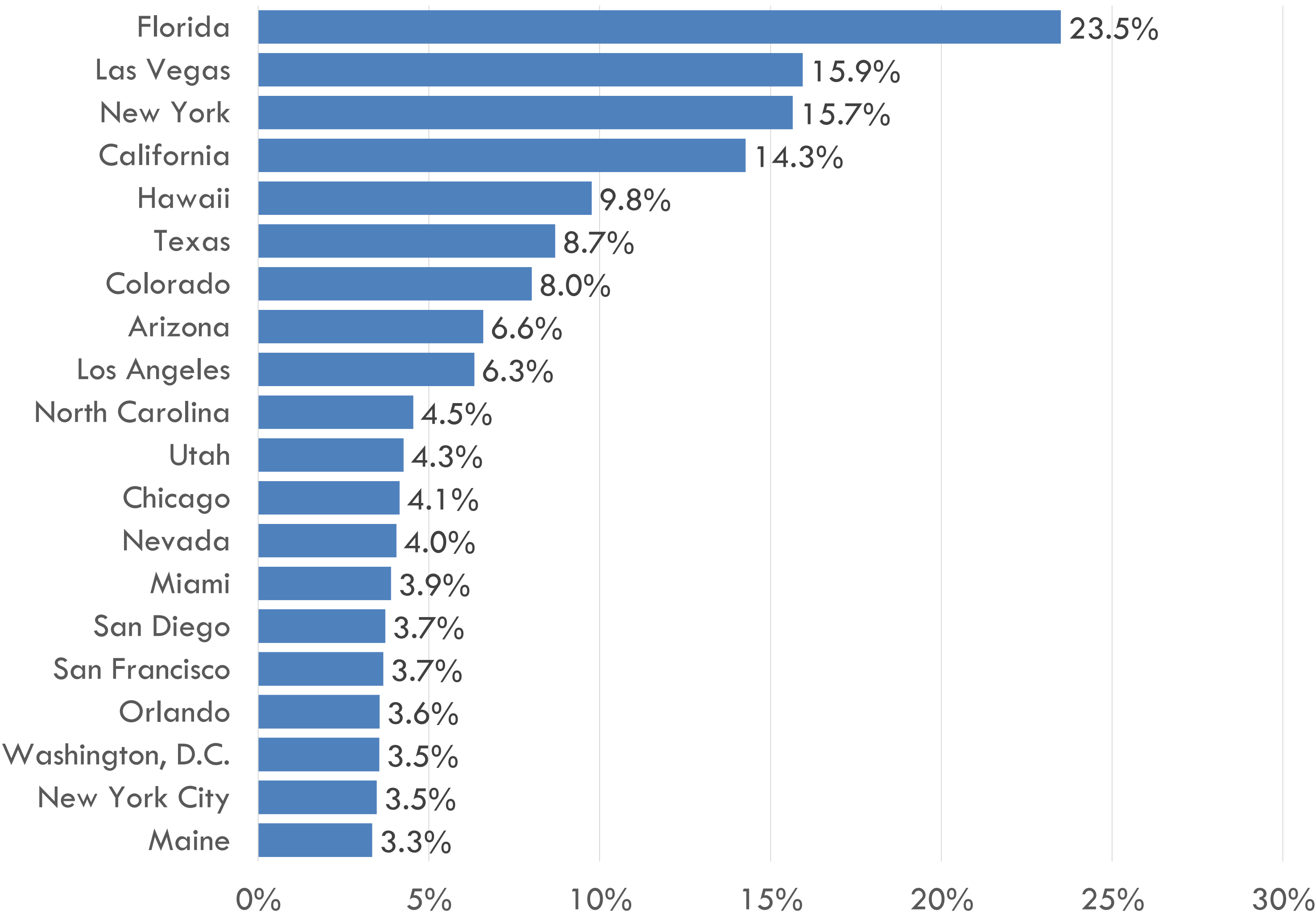
<b>NEW YORK CITY</b>	<b>17.4%</b>
<b>LAS VEGAS</b>	<b>15.8%</b>
<b>ORLANDO/DISNEY WORLD</b>	<b>10.1%</b>
<b>FLORIDA</b>	<b>9.1%</b>
<b>LOS ANGELES</b>	<b>7.1%</b>
<b>HAWAII</b>	<b>6.1%</b>
<b>WASHINGTON DC</b>	<b>5.7%</b>
<b>CALIFORNIA</b>	<b>5.6%</b>
<b>CHICAGO</b>	<b>5.5%</b>
<b>MIAMI</b>	<b>5.1%</b>
<b>SAN FRANCISCO</b>	<b>4.9%</b>
<b>ATLANTA</b>	<b>4.9%</b>
<b>SAN DIEGO</b>	<b>4.3%</b>
<b>SEATTLE</b>	<b>4.2%</b>
<b>NEW ORLEANS</b>	<b>3.7%</b>
<b>YELLOWSTONE NP</b>	<b>3.7%</b>
<b>GRAND CANYON NP</b>	<b>3.7%</b>
<b>BOSTON</b>	<b>3.3%</b>



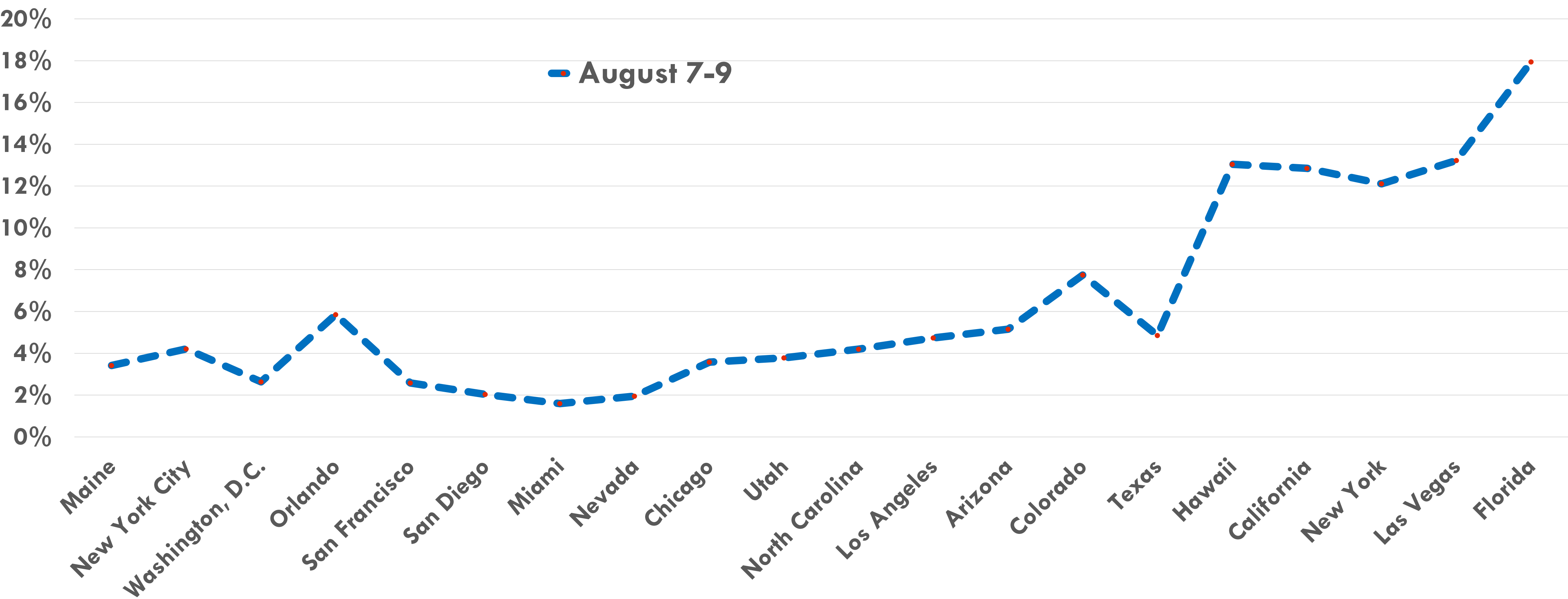
# MOST DESIRED DESTINATIONS (UNAIDED)

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

*(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)*

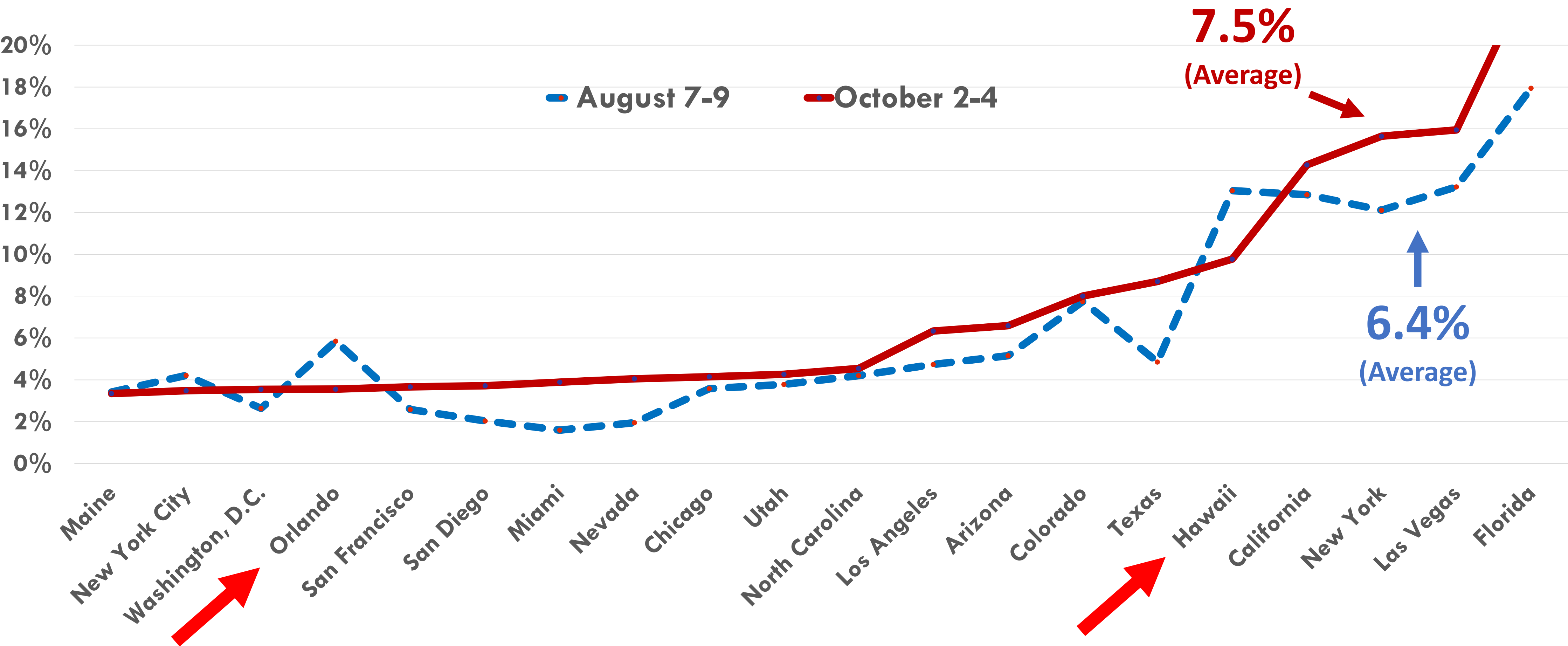


# MOST DESIRED DESTINATIONS (UNAIDED)



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

# MOST DESIRED DESTINATIONS (UNAIDED)

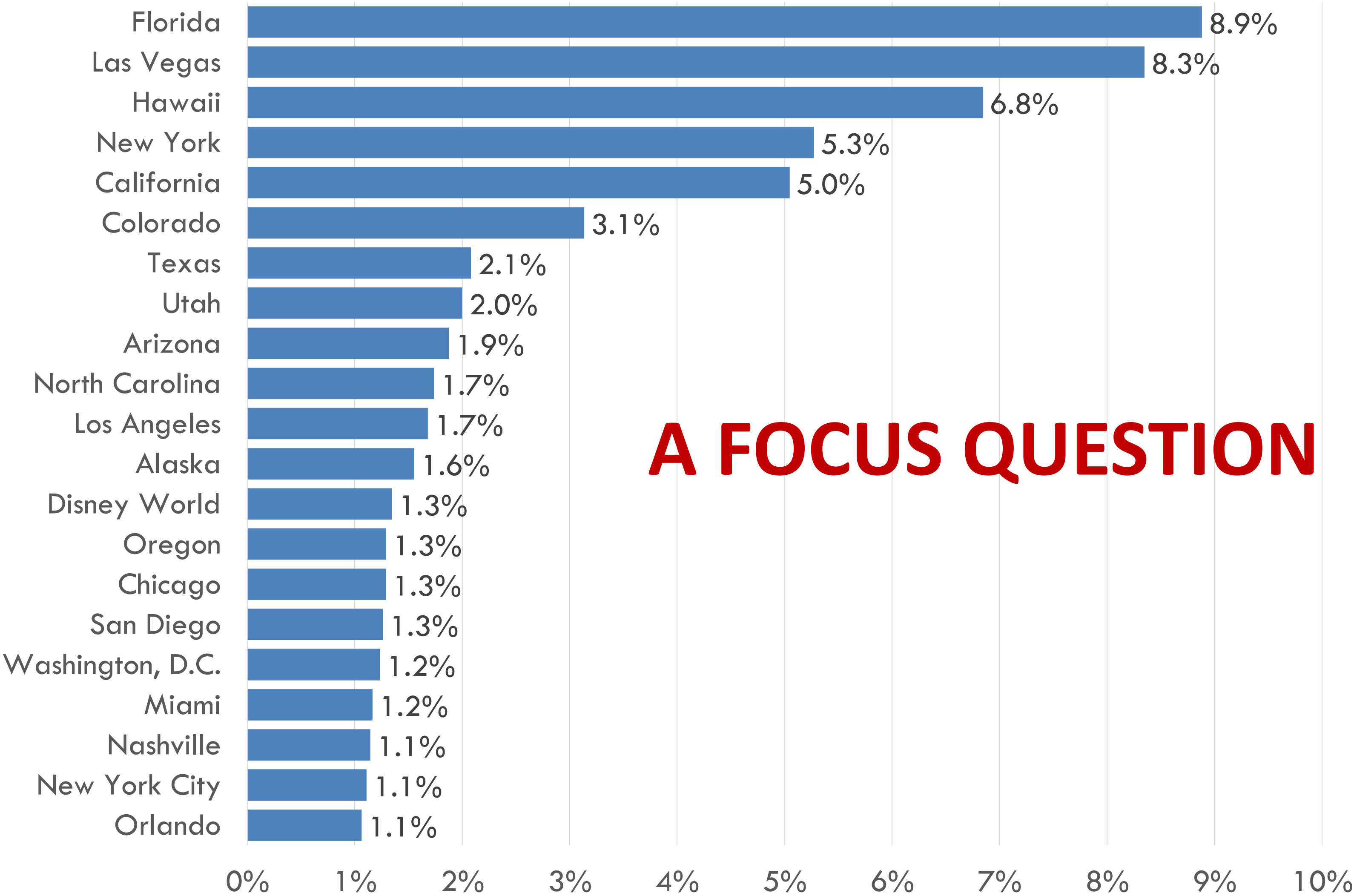


**Question:** What are the THREE (3) United States travel destinations that you most want to visit in the next TWELVE (12) MONTHS?

# SINGLE MOST DESIRED DESTINATION (UNAIDED)

**Question:** From your list above, which ONE of these destinations do you MOST WANT TO VISIT?

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

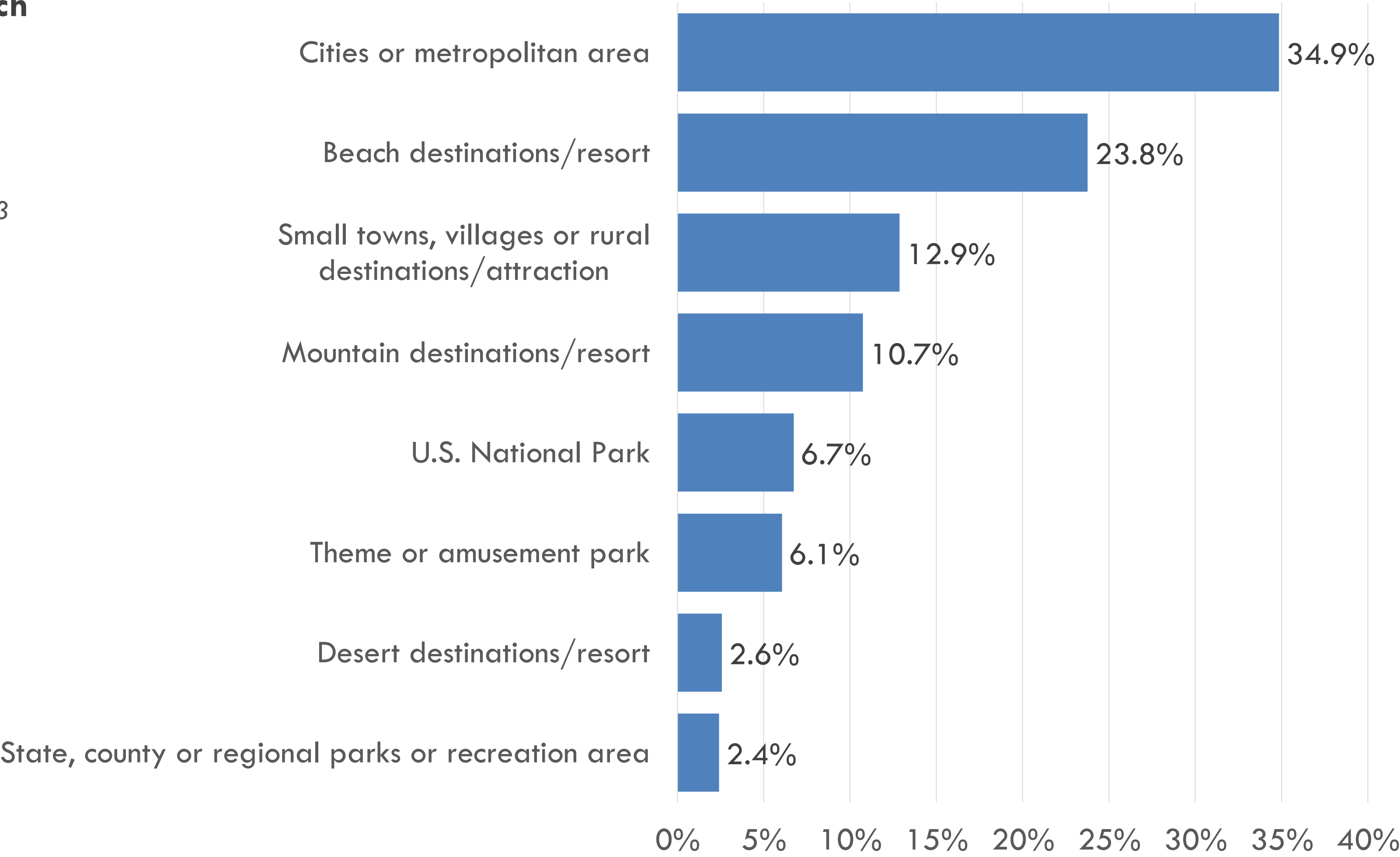


A FOCUS QUESTION

# MOST DESIRED DESTINATION TYPE

**Question:** In your opinion, which of these best describes this destination? (Select one)

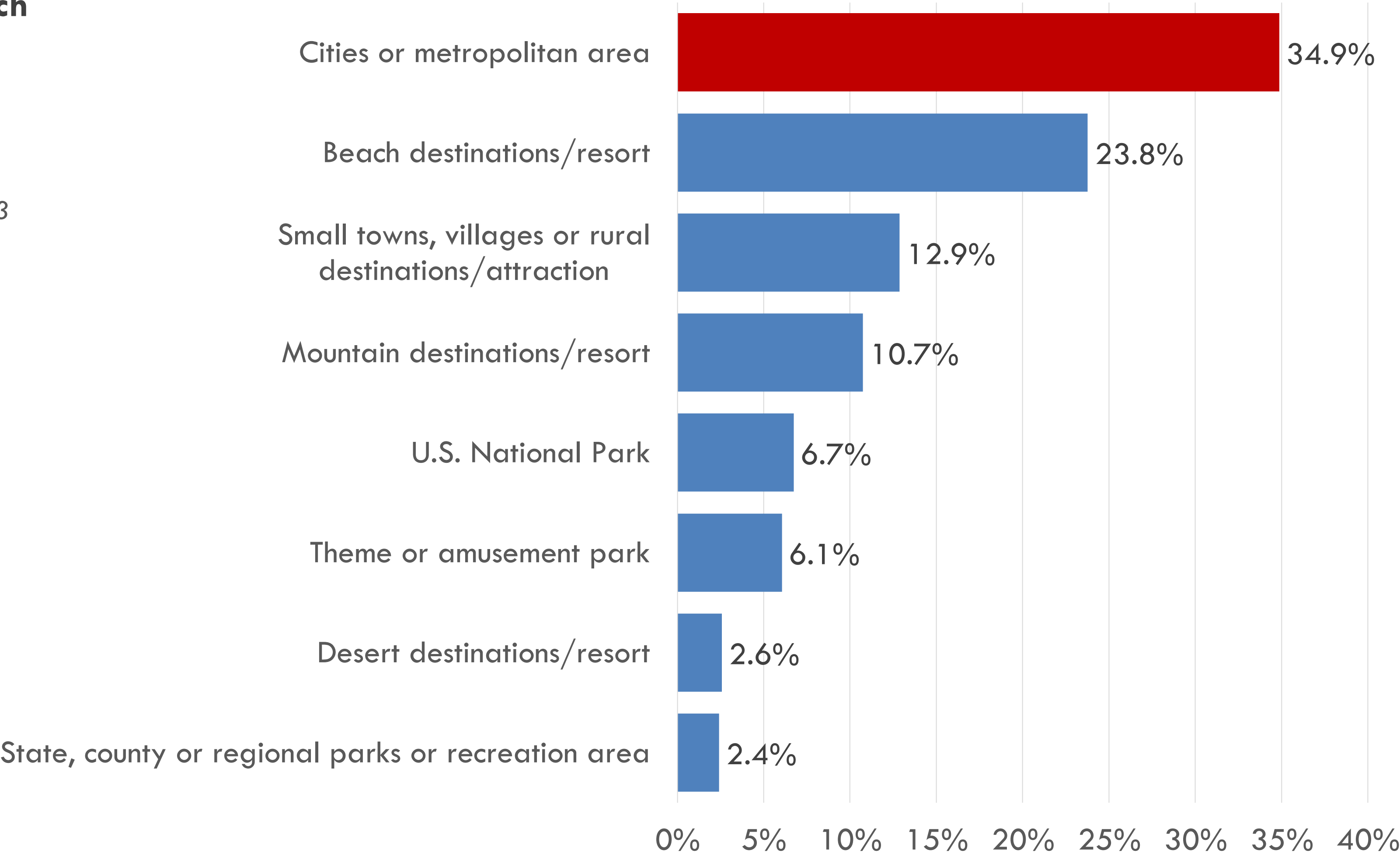
(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)



# MOST DESIRED DESTINATION TYPE

**Question:** In your opinion, which of these best describes this destination? (Select one)

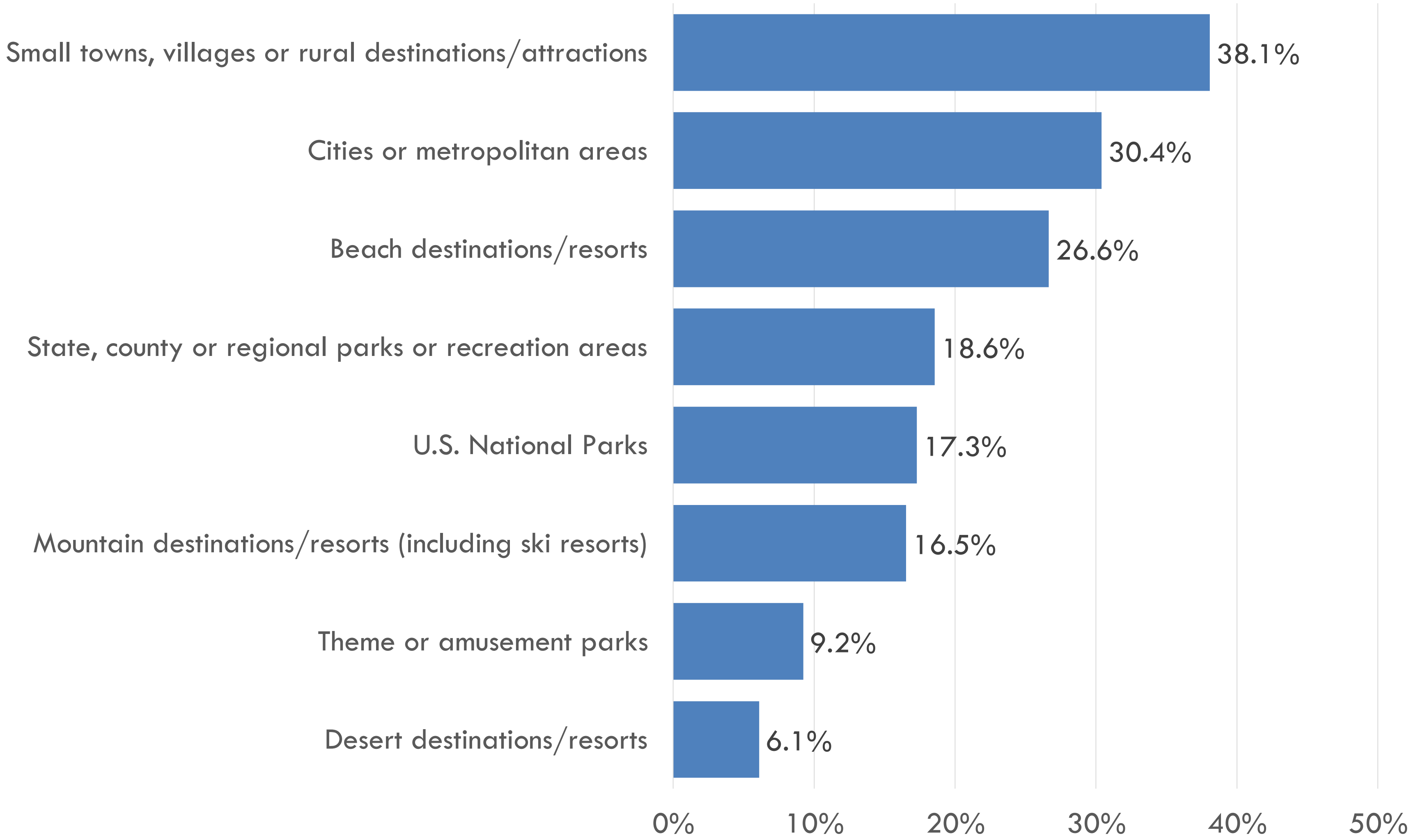
(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)



# DESTINATION TYPES ON FALL TRIPS: LAST WEEK

**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)



An aerial photograph of a dense urban skyline, likely New York City, during the "golden hour" of sunset. The sky is filled with soft, orange and yellow clouds, and the city's numerous skyscrapers and buildings are illuminated by the warm, low-angle light, creating a vibrant and textured scene. The perspective is from a high vantage point, looking down and across the city.

# ASPIRATIONAL CITY VISITORS

- Skewing male, Baby Boomers, urban residents
- Have relatively higher levels of anxiety about the virus and its impact on the economy
- Likelier to say that they won't travel until there is a vaccine and feel that if they travel right now they would not be able to fully enjoy it
- Are likely to be reached with travel messaging through email, online content and Facebook, as well as printed magazines

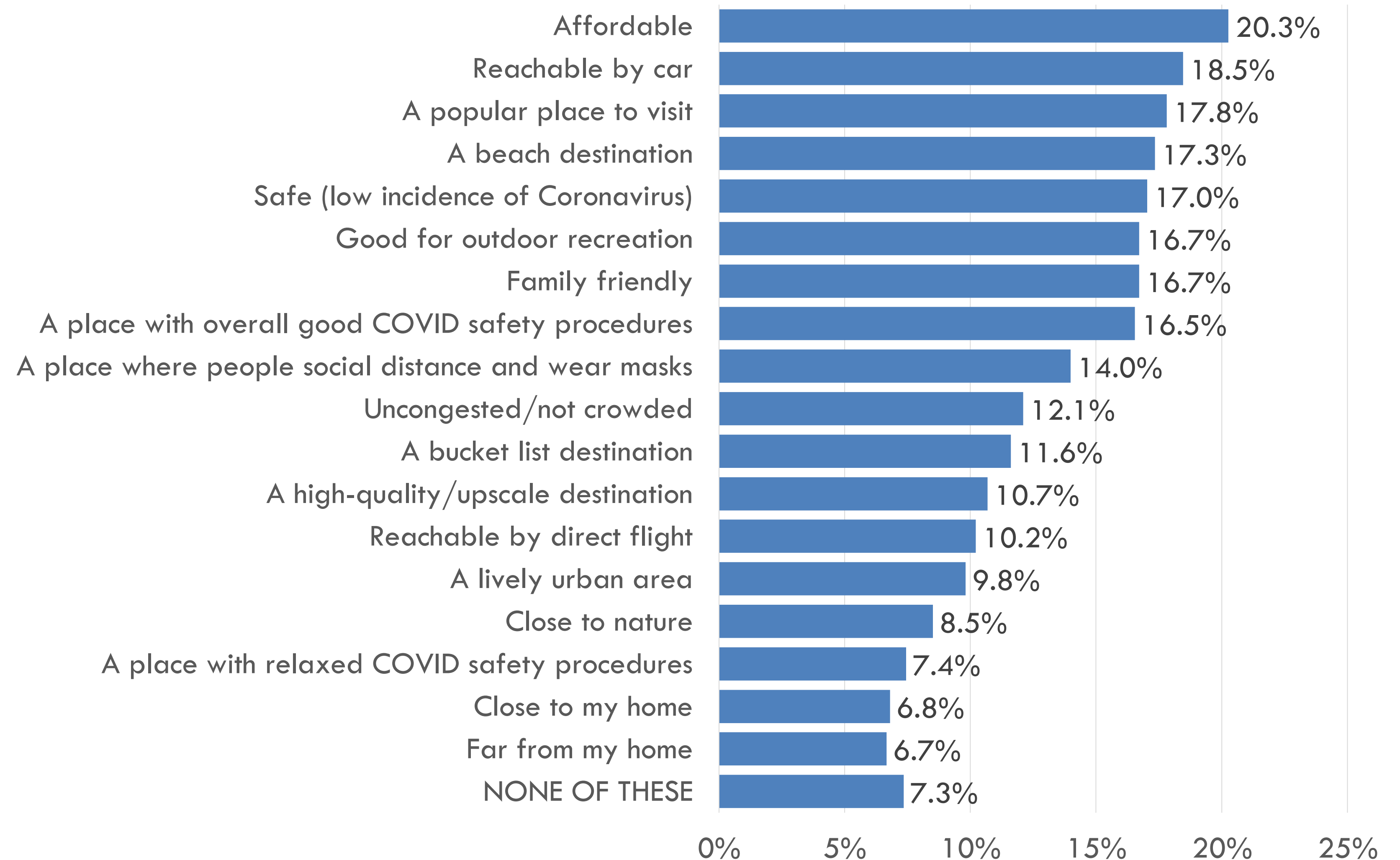
# IMPORTANT FACTORS IN SELECTING MOST DESIRED DESTINATION

**Question:** Which of the following are **IMPORTANT TO WHY YOU WANT TO VISIT** this destination? (Select all that accurately fill in the blank)

**It's important to me that this destination is**

\_\_\_\_\_.

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

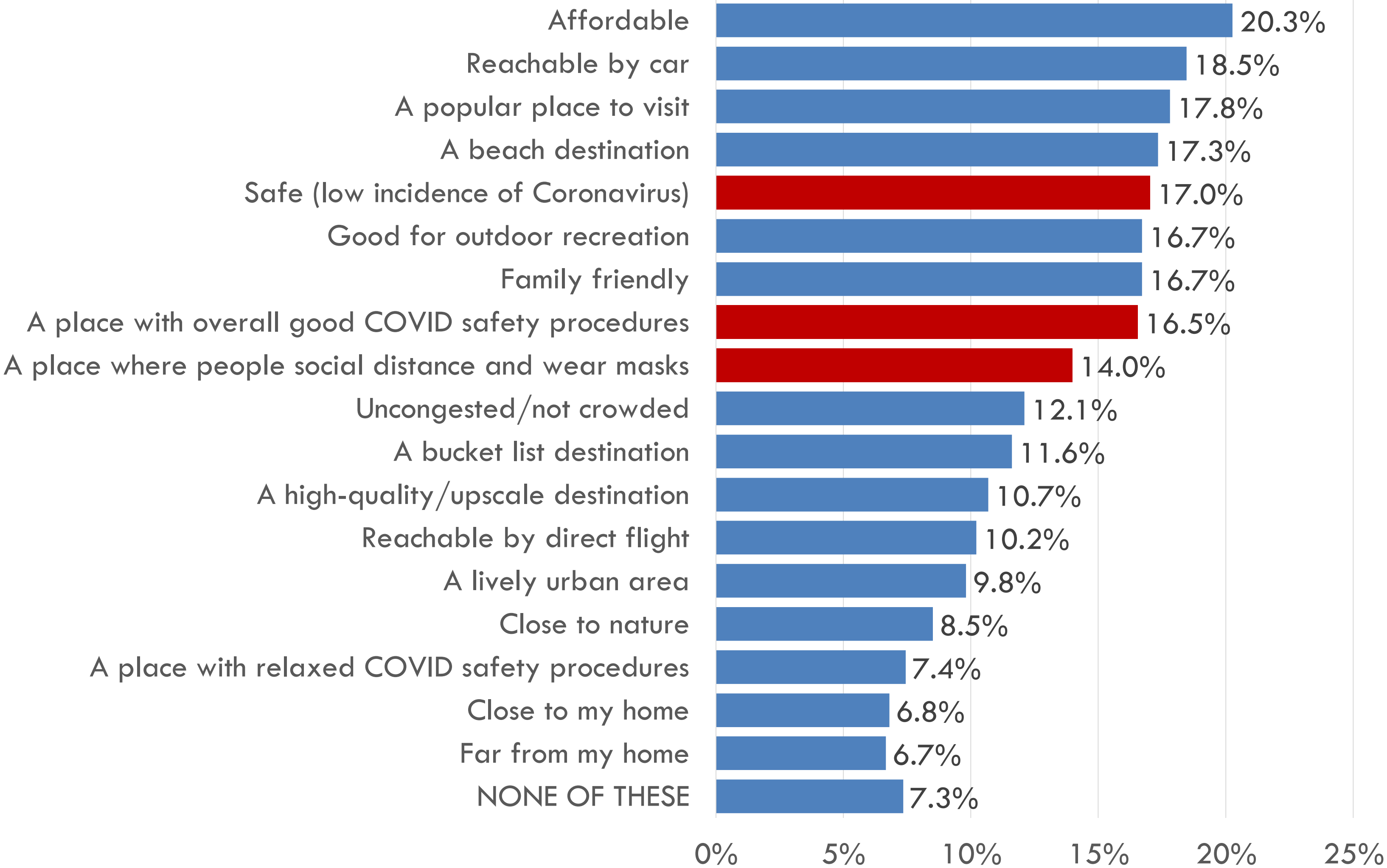


# IMPORTANT FACTORS IN SELECTING MOST DESIRED DESTINATION

**Question:** Which of the following are **IMPORTANT TO WHY YOU WANT TO VISIT** this destination? (Select all that accurately fill in the blank)

**It's important to me that this destination is** \_\_\_\_\_.

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

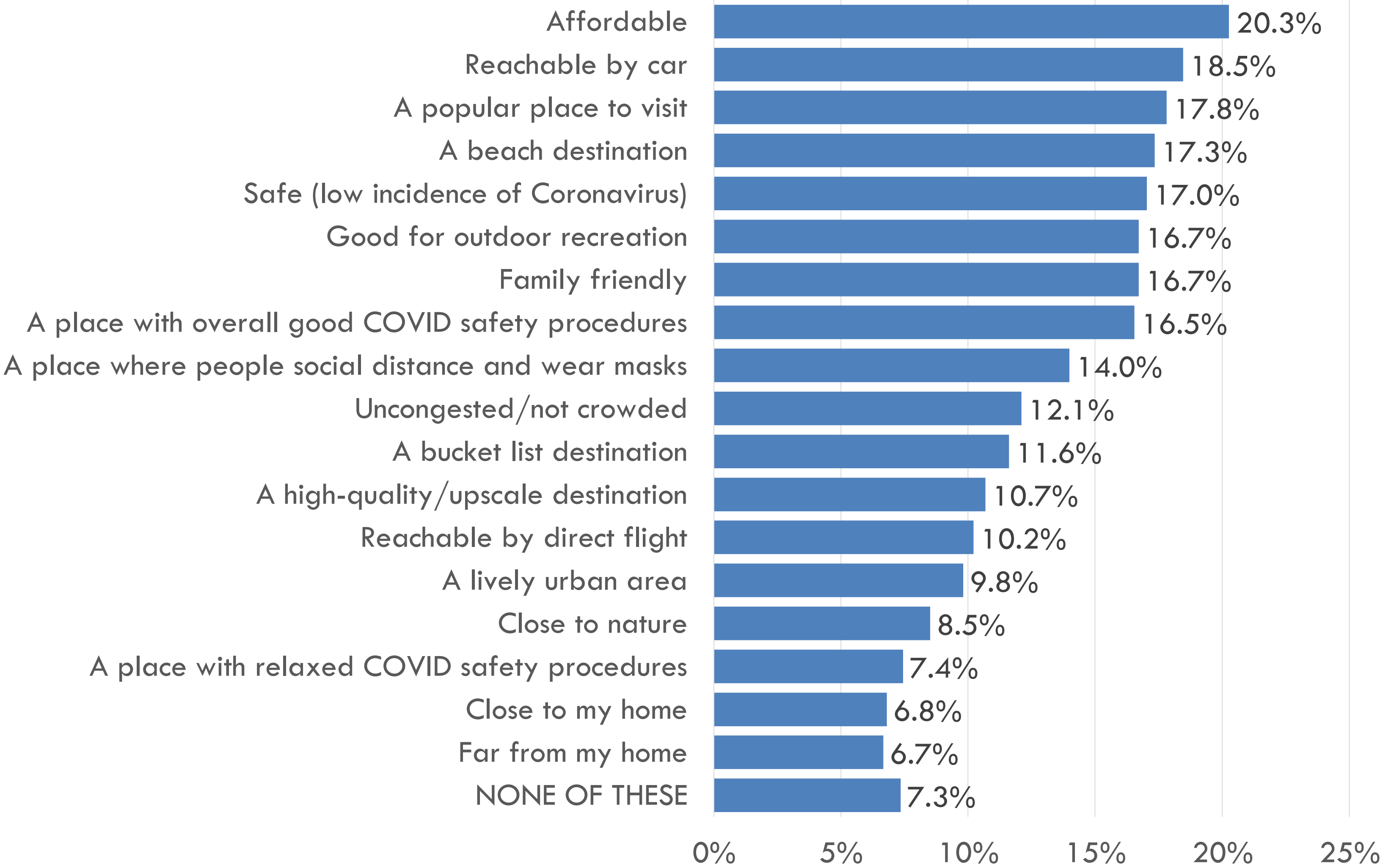


# IMPORTANT FACTORS IN SELECTING MOST DESIRED DESTINATION

**Question:** Which of the following are **IMPORTANT TO WHY YOU WANT TO VISIT** this destination? (Select all that accurately fill in the blank)

**It's important to me that this destination is** \_\_\_\_\_.

*(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)*

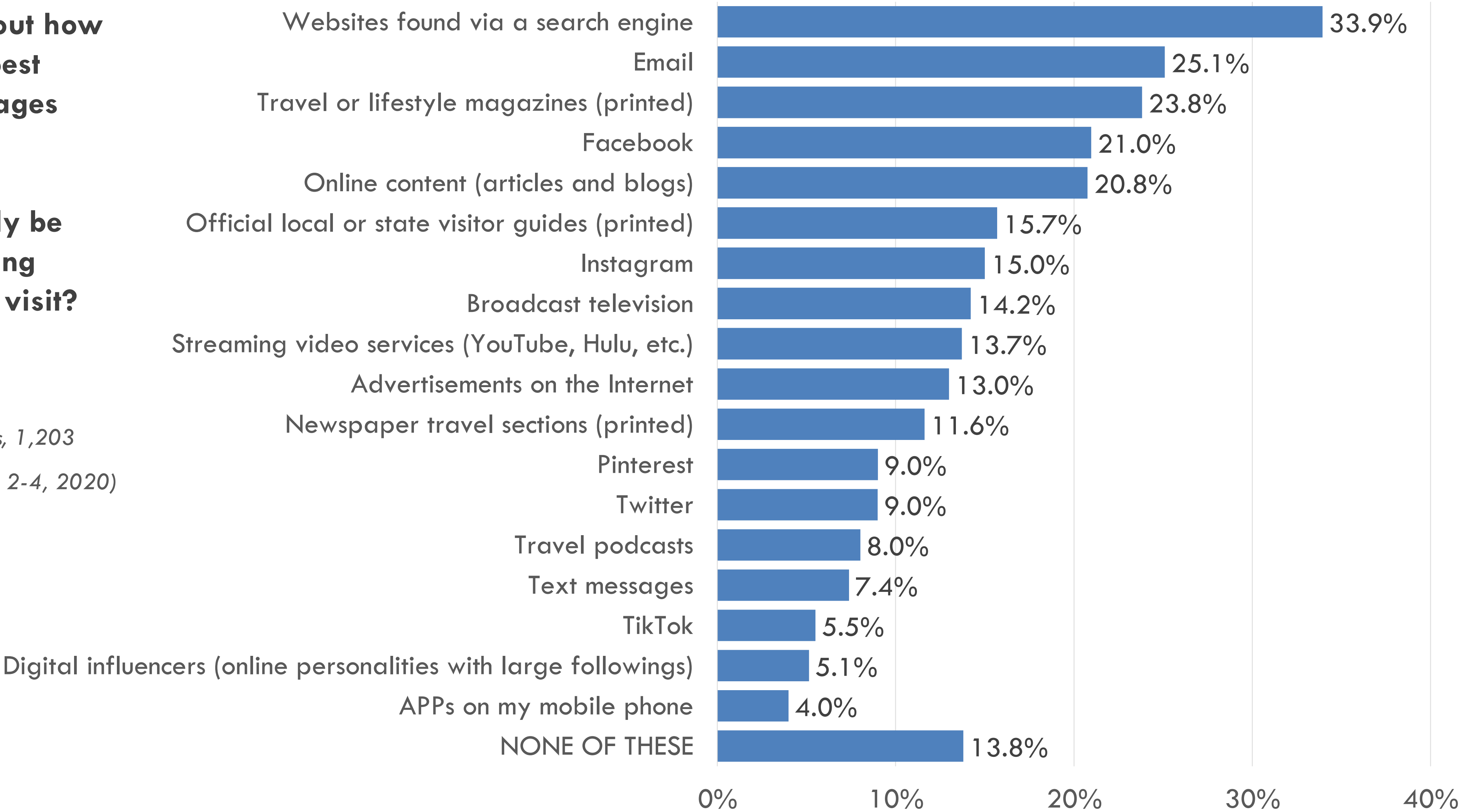


# CHANNELS TRAVELERS ARE RECEPTIVE TO

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

Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit?

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)

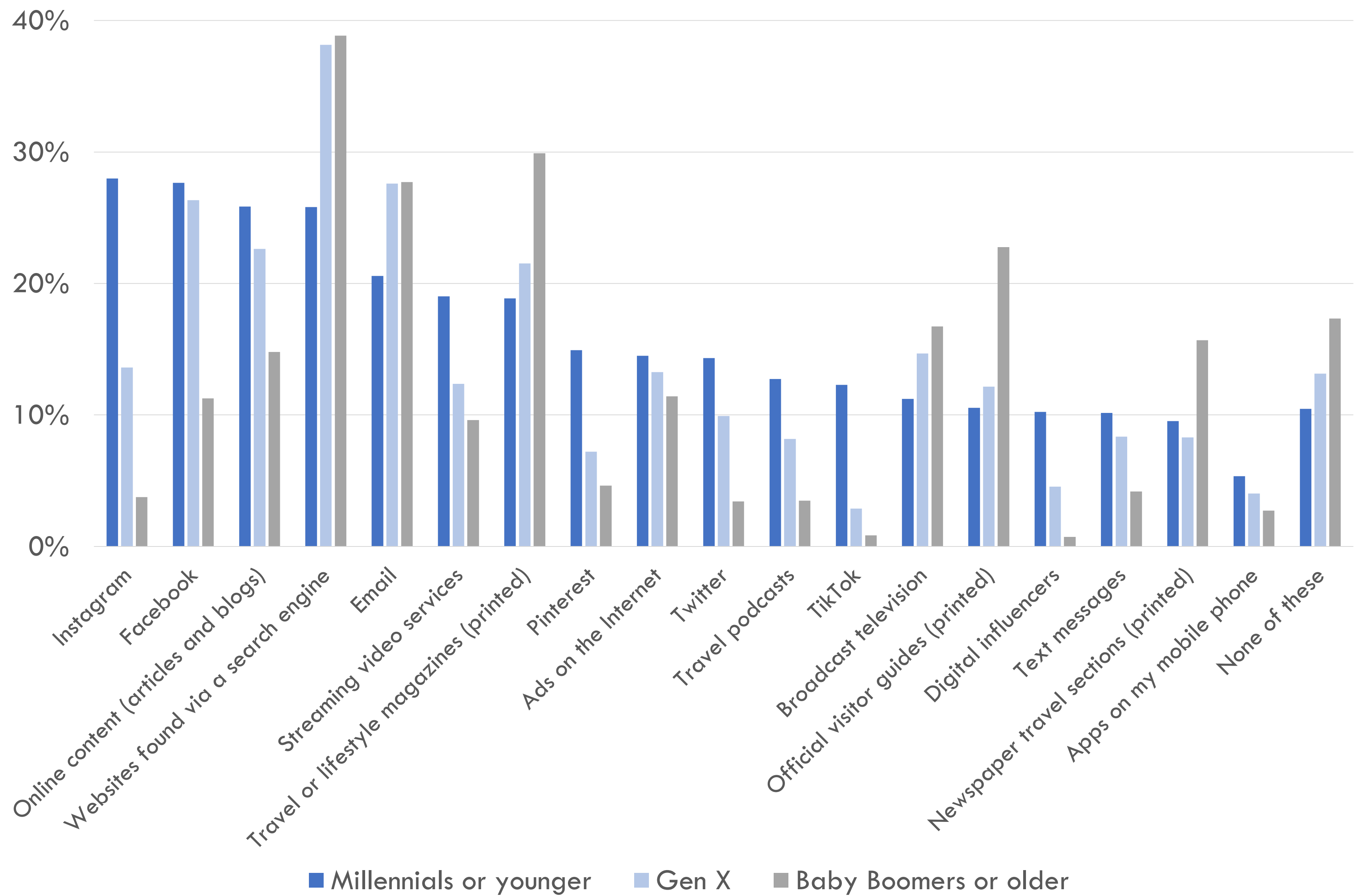


# CHANNELS TRAVELERS ARE RECEPTIVE TO—BY GENERATION

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

Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit?

(Base: Wave 30 data. All respondents, 1,203 completed surveys. Data collected Oct 2-4, 2020)





# KEY TAKEAWAYS

- Top tier US destinations dominate the hot list of where Americans most want to visit, although outdoor destinations continue to displace some iconic cities for top spots
- There are indicators that urban destinations may be poised for further recovery, as cities lead in traveler aspirations
- In addition to affordability and accessibility, factors related to coronavirus safety continue to be critical to destination aspiration and selection
- Younger travelers continue to be more receptive to travel marketing on social media, while Baby Boomers are comparatively more reachable through print resources

# THE TRAVEL AVOIDERS

**S T A Y H O M E  
S A F E**

A close-up photograph of a hand placing a white die onto a row of other white dice. The dice are arranged on a reflective surface. The first four dice spell out 'STAY', and the last two spell out 'HOME'. The new die being placed has 'SAFE' on its top face. The background is a blurred green and yellow, suggesting an outdoor setting.

# THE TRAVEL AVOIDERS

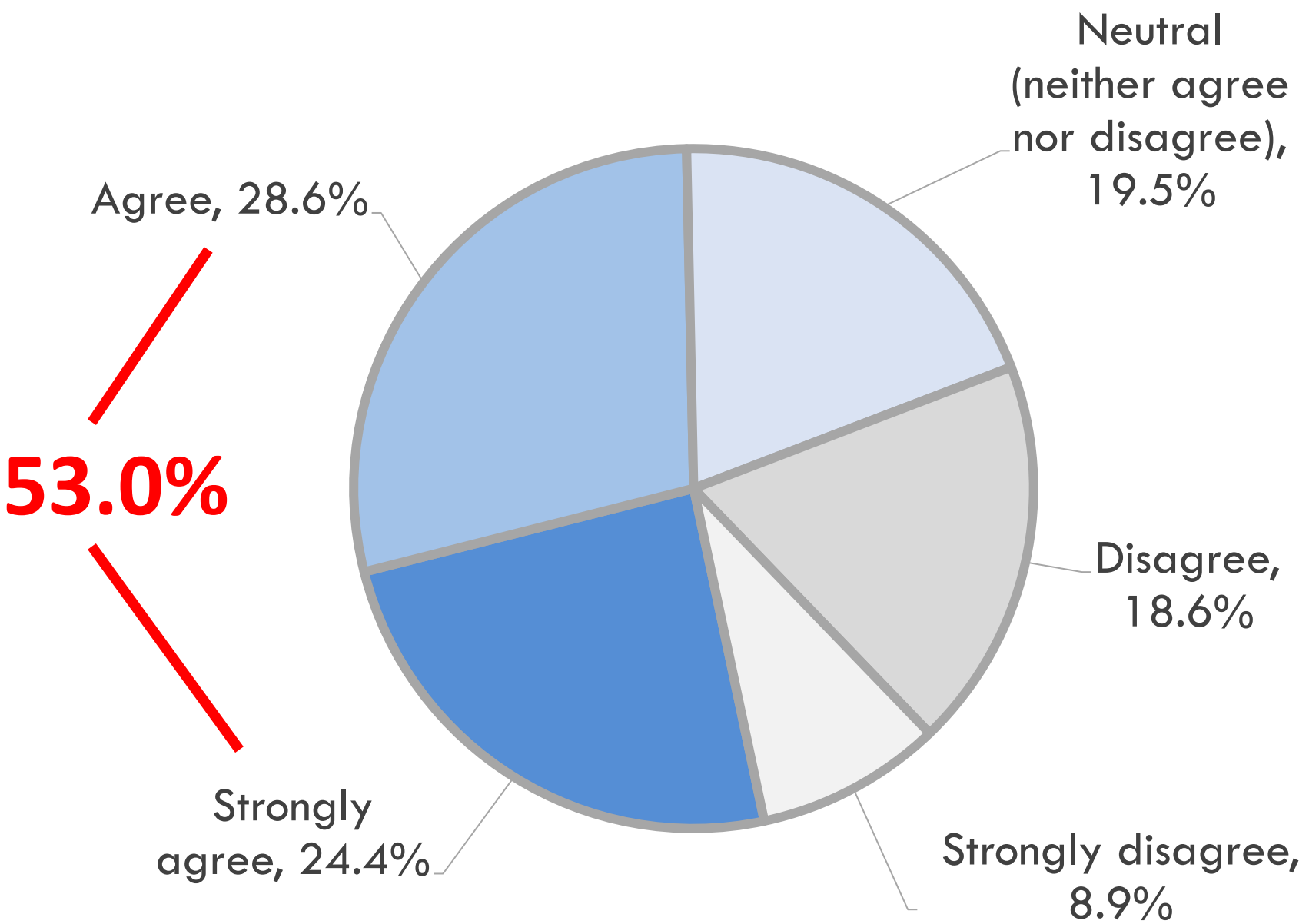
**Agree:** *I'm planning to avoid all travel until the Coronavirus situation blows over.*



# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

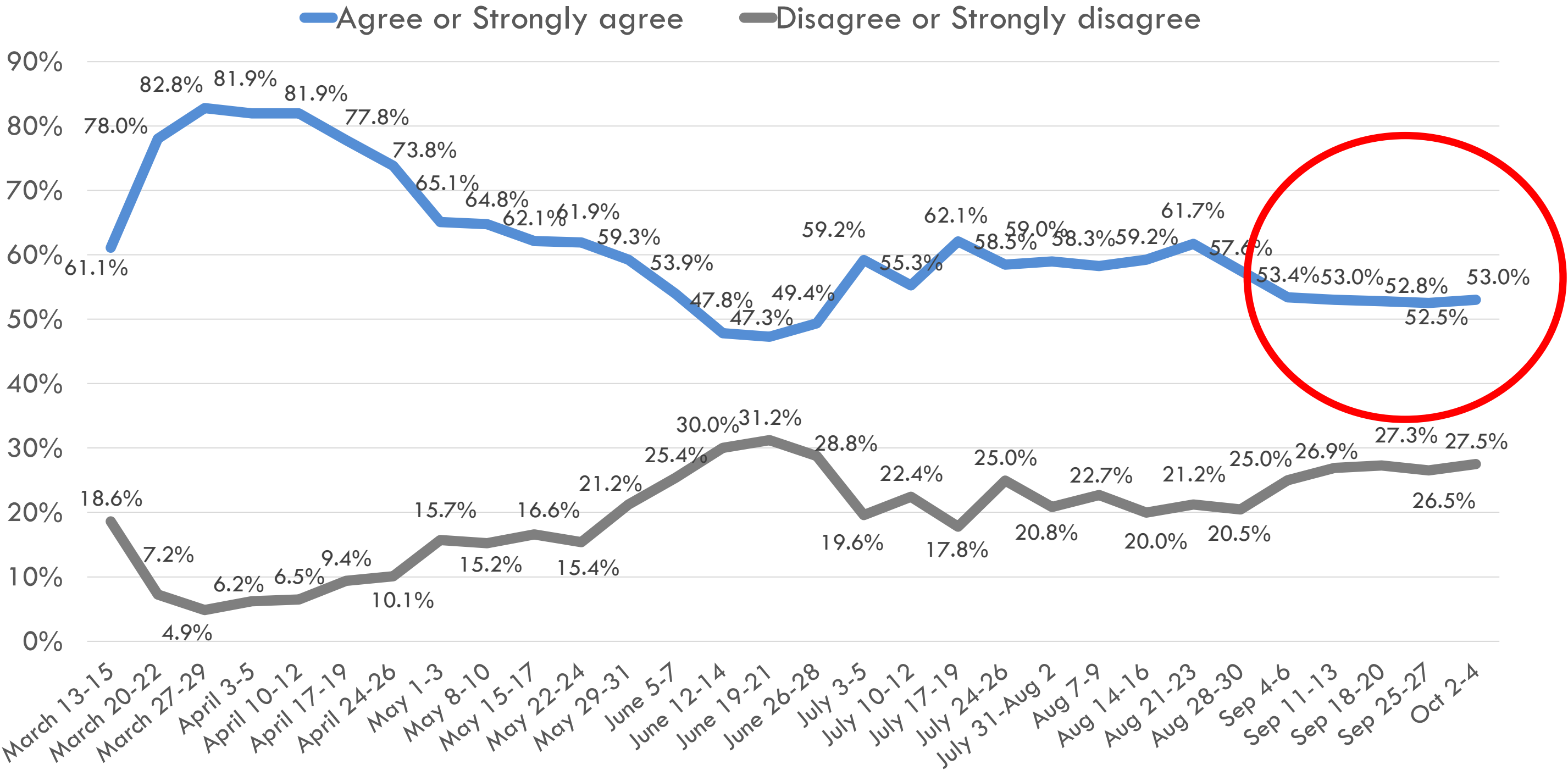
How much do you agree with the following statement?

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



(Base: Waves 1-30. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

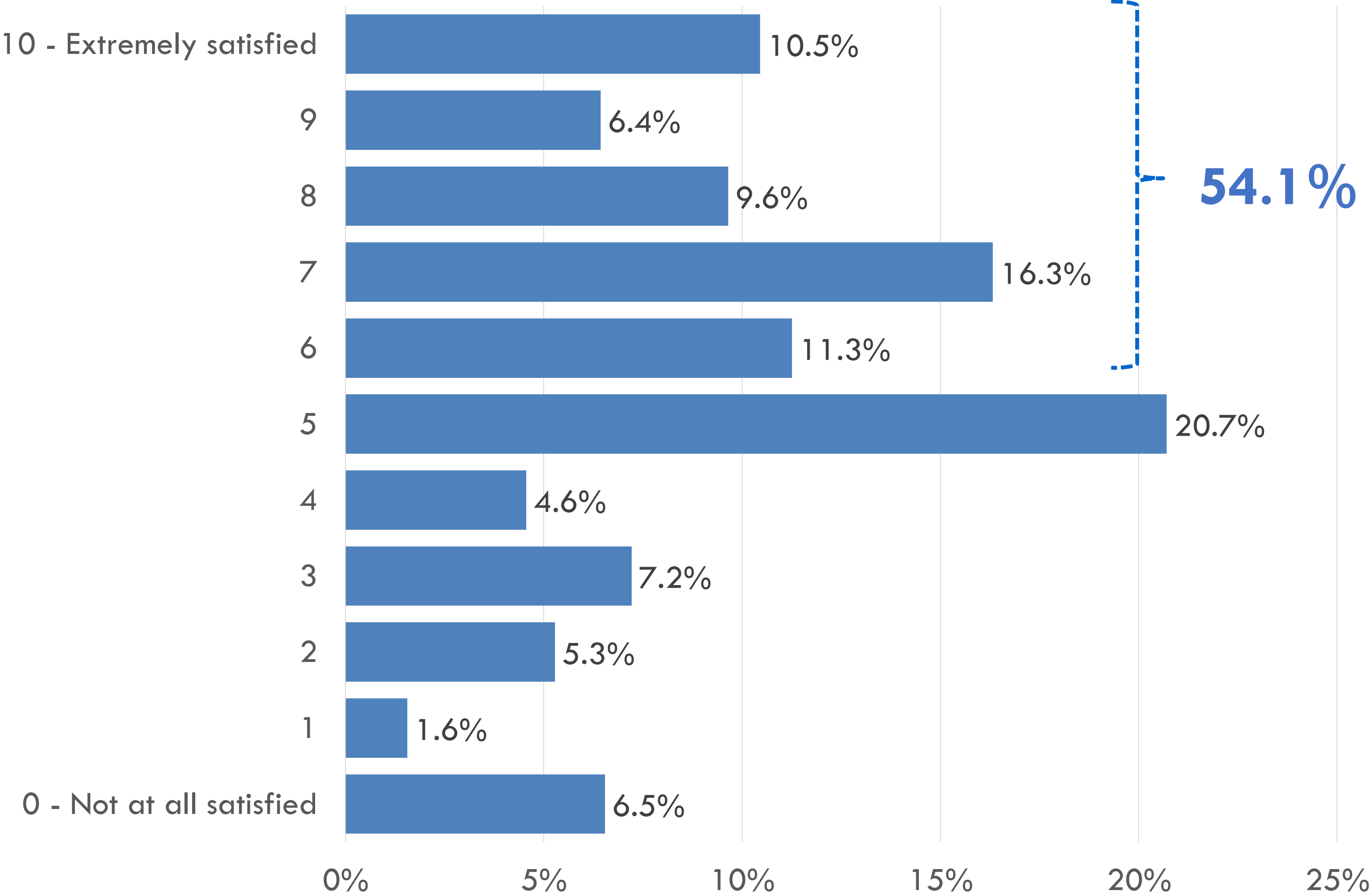
## Historical data



# TRAVEL AVOIDERS: SATISFACTION WITH INFORMATION SOURCES

**Question:** On a scale of 0-10, how satisfied are you with the information available to travelers to help decide when it will be safe again to travel?

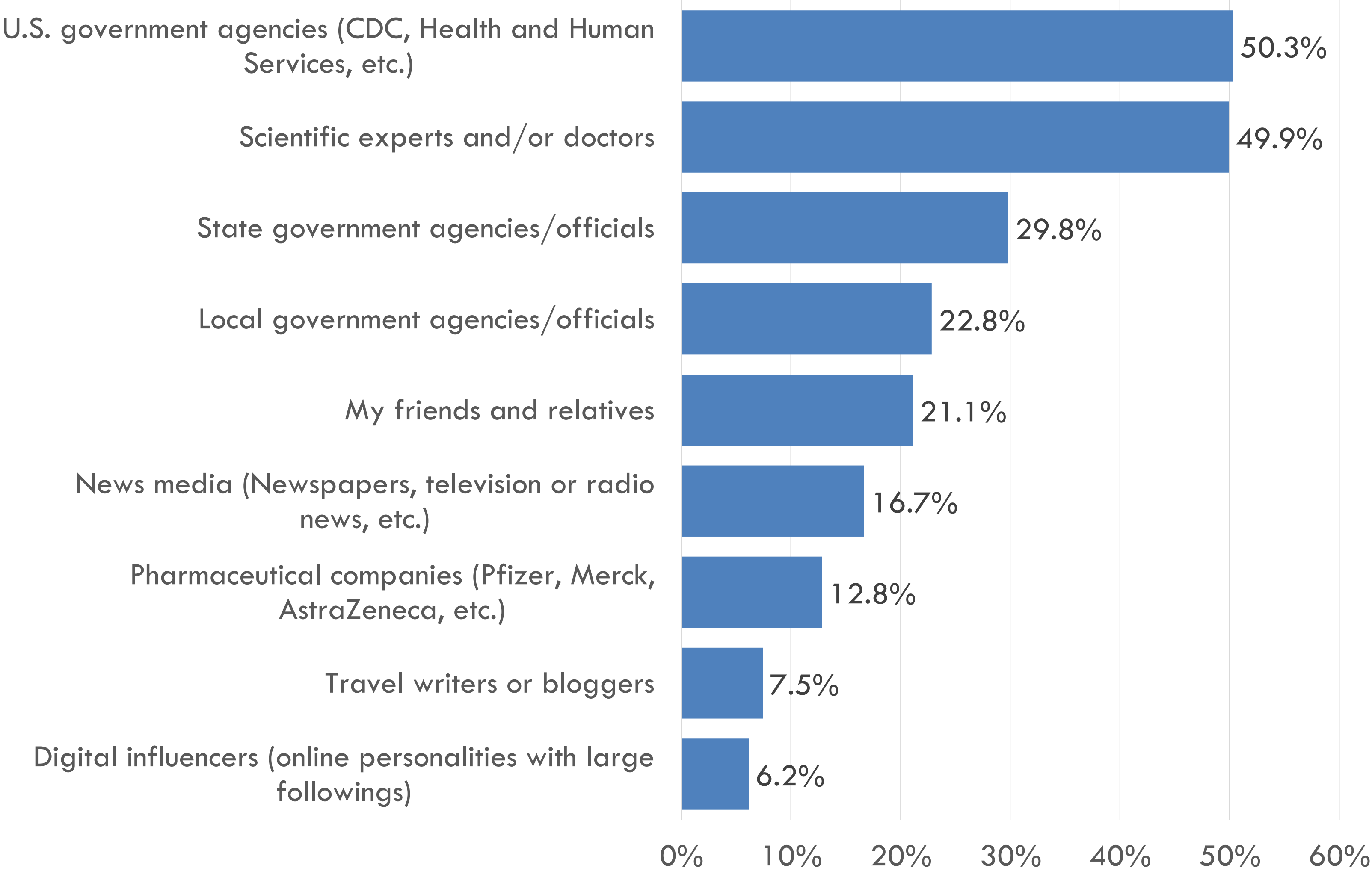
*(Base: Wave 30 data. Respondents who will not travel until the pandemic blows over, 640 completed surveys. Data collected Oct 2-4, 2020)*



# TRAVEL AVOIDERS: MOST TRUSTED COVID INFORMATION RESOURCES

**Question:** When making recommendations on when it is safe to travel, which of these information resources do you believe would HAVE YOUR BEST INTERESTS IN MIND? (Select all that apply)

(Base: Wave 30 data. Respondents who will not travel until the pandemic blows over, 640 completed surveys. Data collected Oct 2-4, 2020)

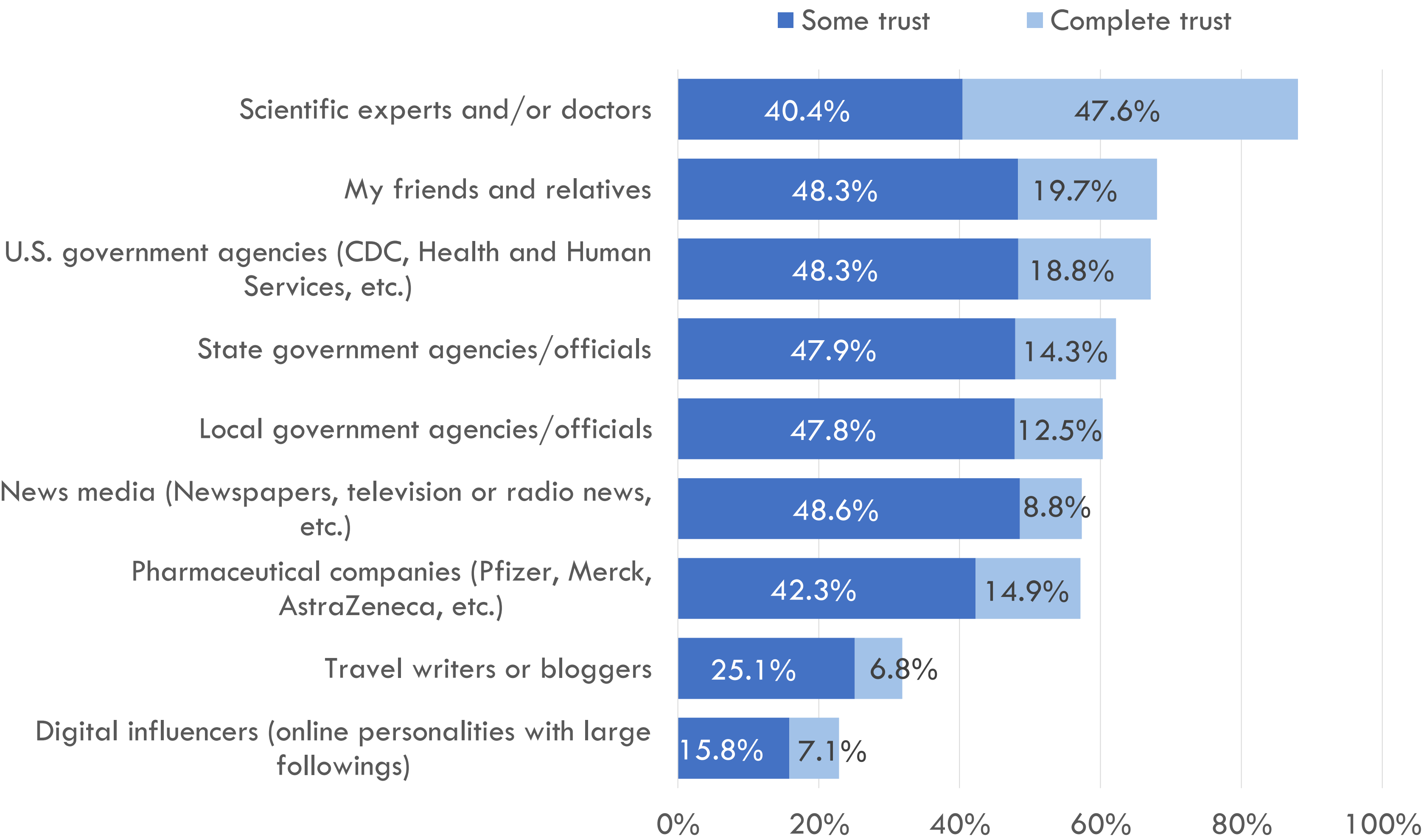


# TRAVEL AVOIDERS: TRUST LEVELS OF COVID INFORMATION RESOURCES

**Question:** How much do you trust each information source in terms of their guidance on when it would be safe to travel? (Fill in the blank for each)

I have \_\_\_\_\_ in this information source

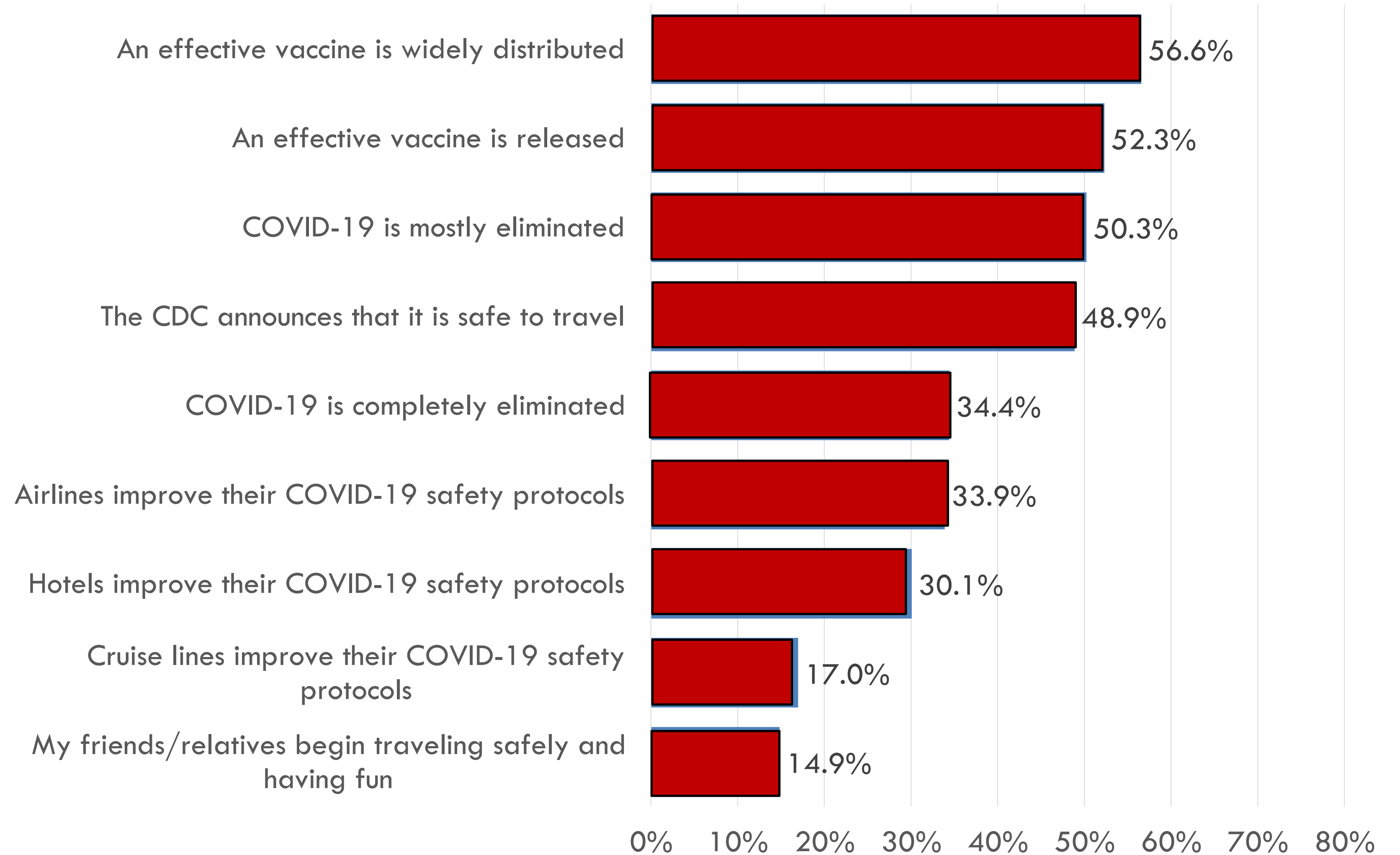
(Base: Wave 30 data. Respondents who will not travel until the pandemic blows over, 640 completed surveys. Data collected Oct 2-4, 2020)



# TRAVEL AVOIDERS: THINGS NEEDED BEFORE THEY WILL TRAVEL

**Question:** Which of the following will you want to have happen before you will be comfortable traveling again? (Select all that apply)

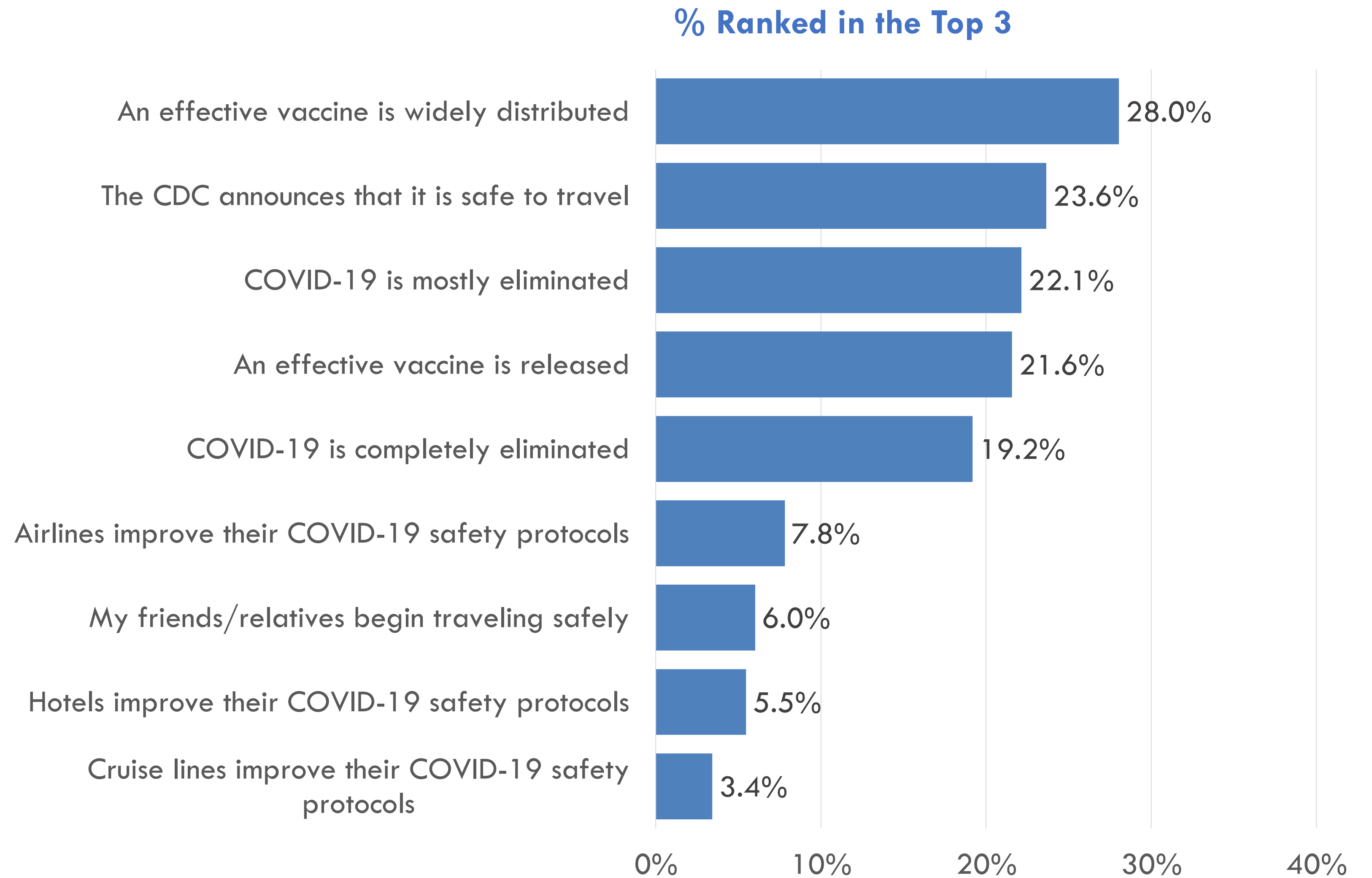
(Base: Wave 30 data. Respondents who will not travel until the pandemic blows over, 640 completed surveys. Data collected Oct 2-4, 2020)



# TRAVEL AVOIDERS: RANKING OF THINGS NEEDED BEFORE TRAVELING

**Question:** Please select and rank the **THREE MOST IMPORTANT** in you becoming comfortable traveling again.

(Base: Wave 30 data. Respondents who will not travel until the pandemic blows over, 640 completed surveys. Data collected Oct 2-4, 2020)



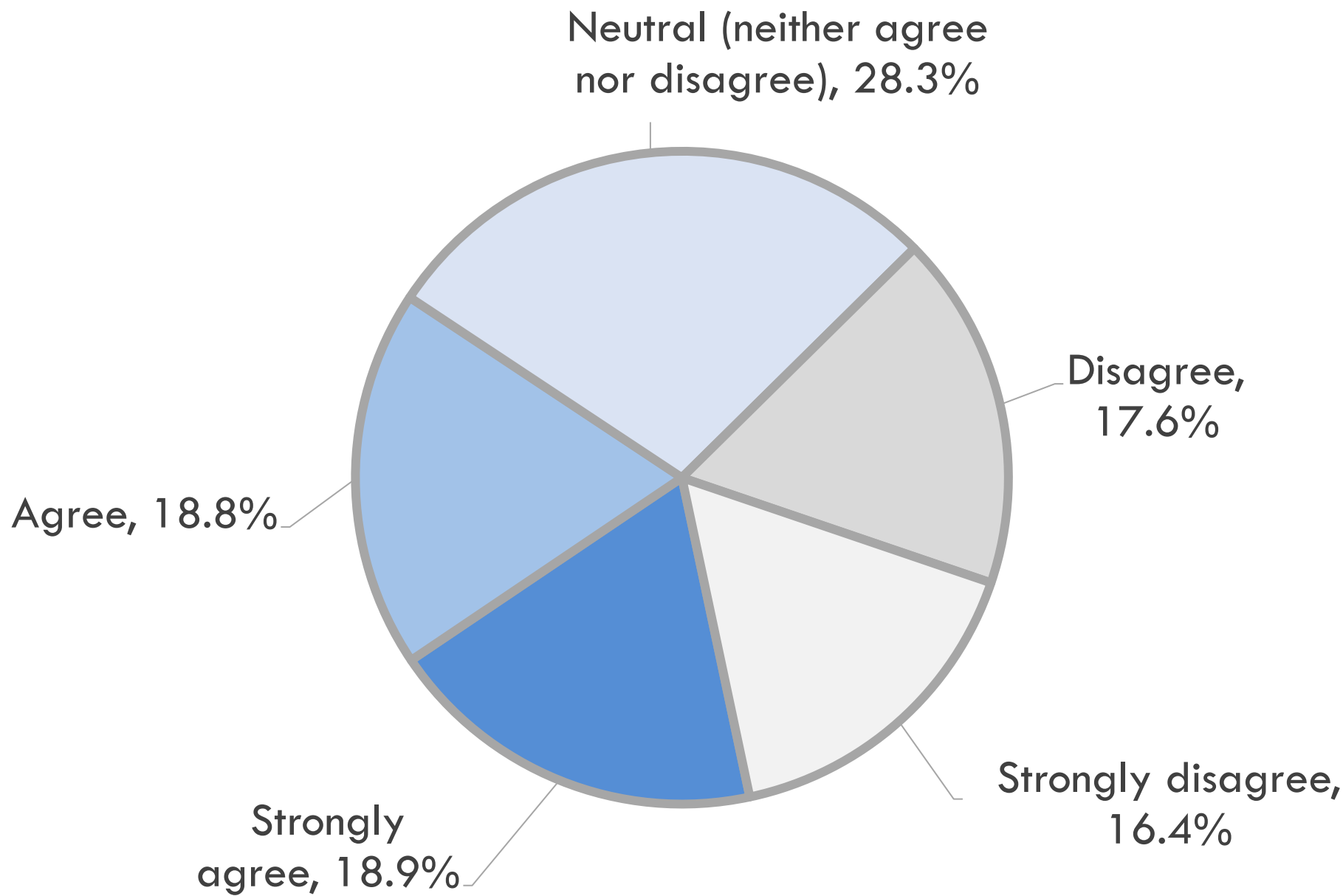


# FEELINGS ABOUT A COVID-19 VACCINE

# WON'T TRAVEL WITHOUT VACCINE

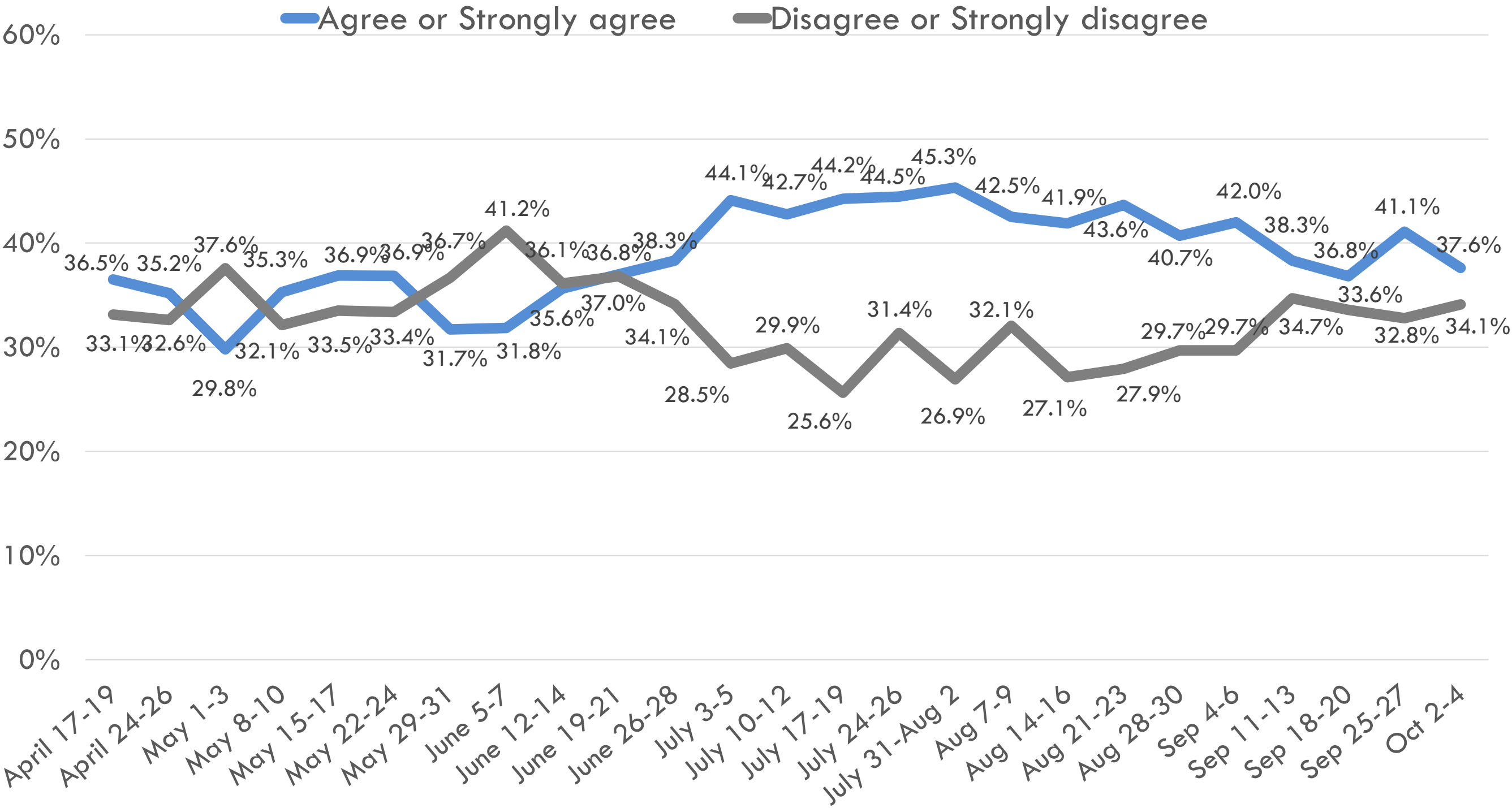
How much do you agree with the following statement?

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



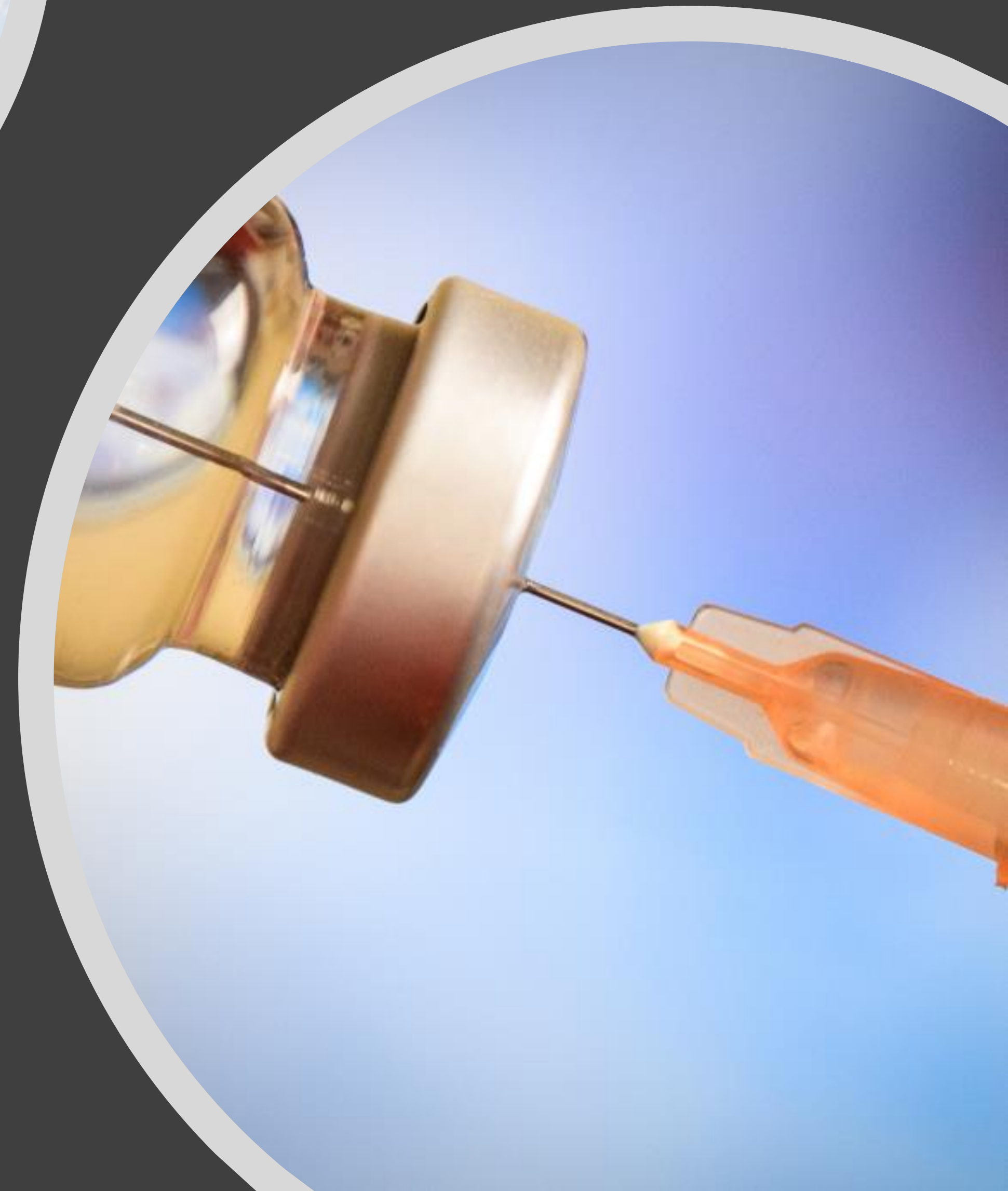
(Base: Waves 6-30. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205 and 1,203 completed surveys.)

## Historical data



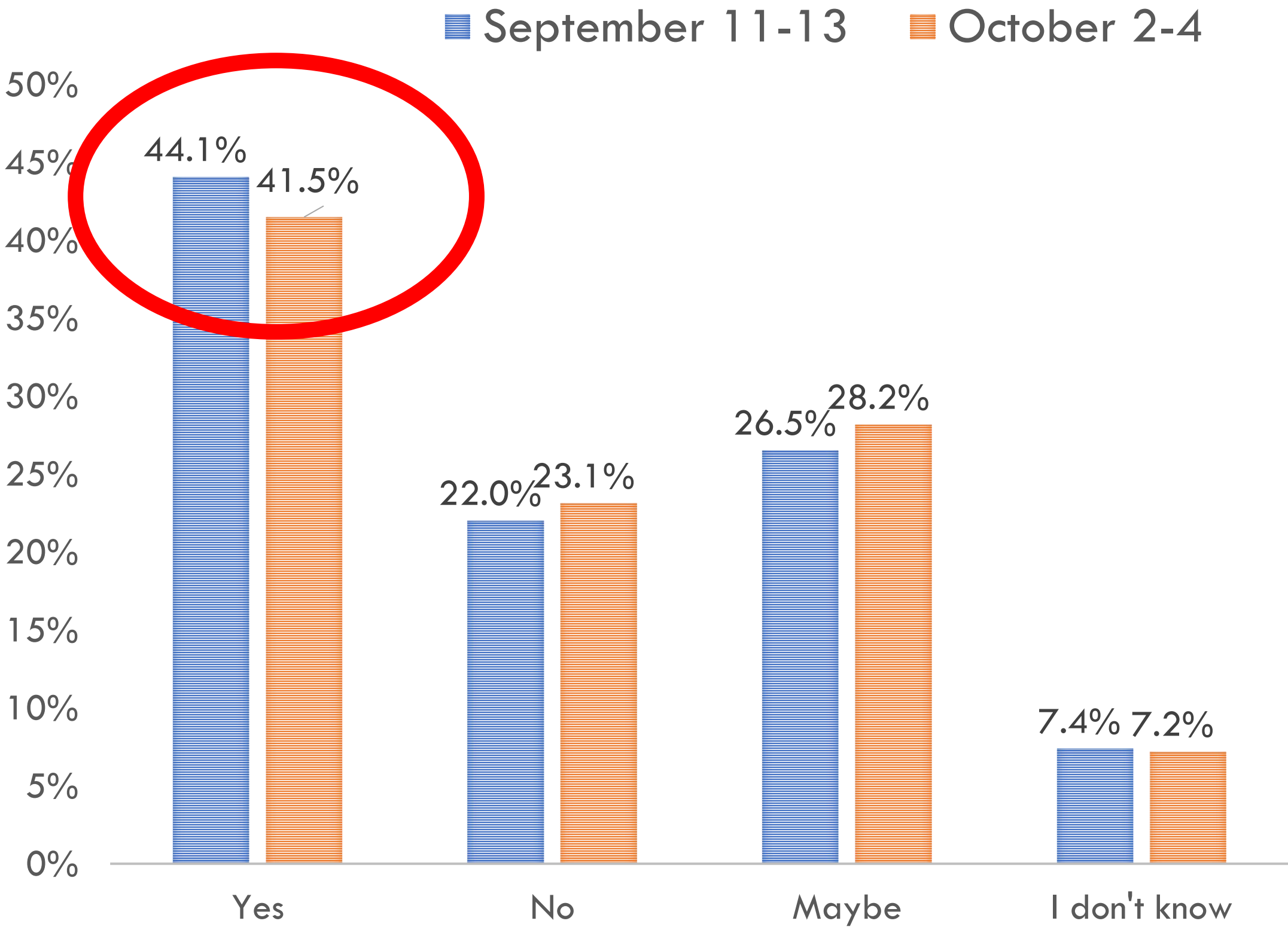
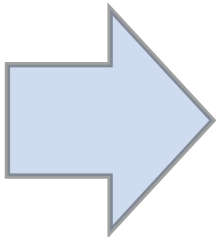
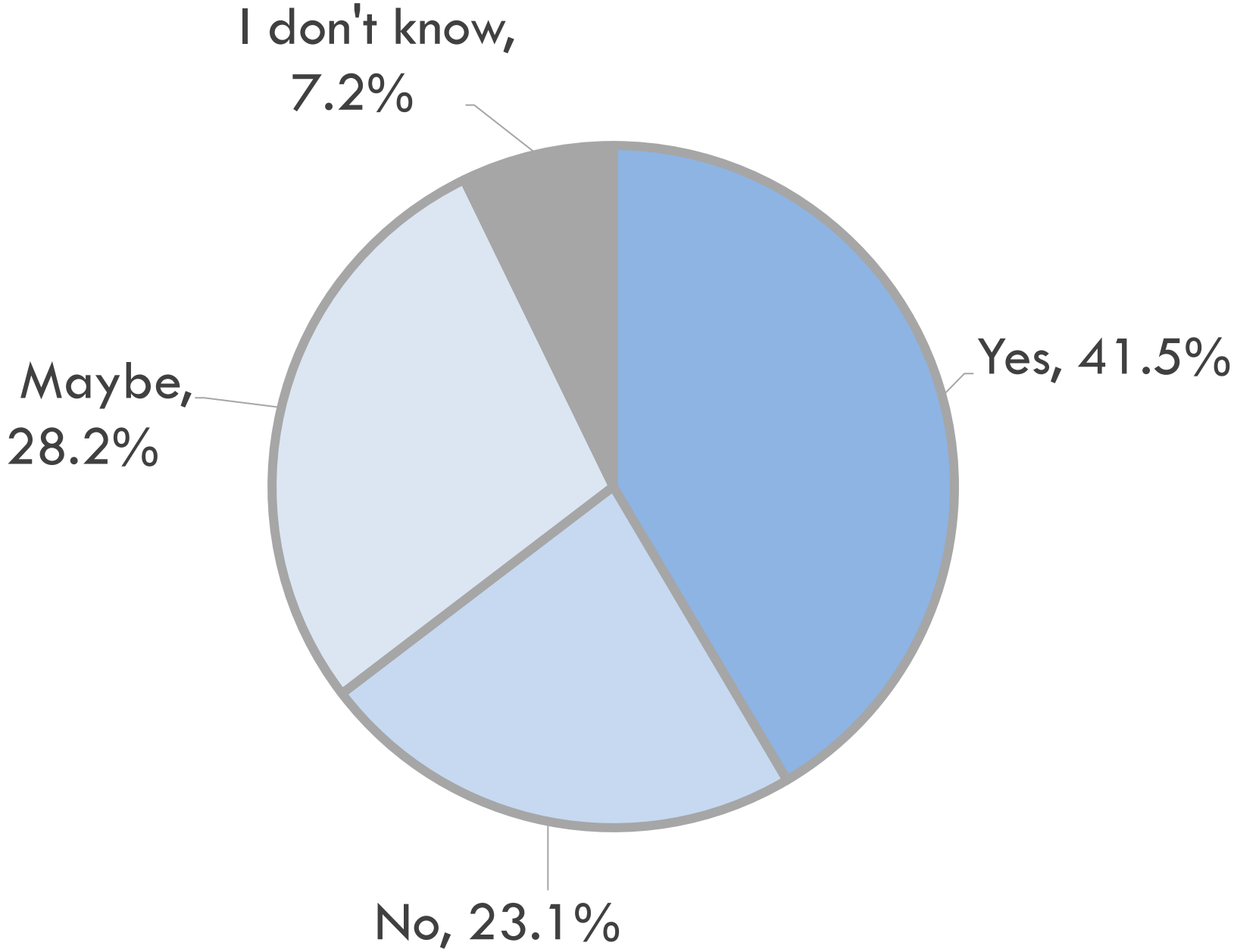


**Question: If a COVID-19 vaccine is developed later this year (or early next year) and is approved for use, would you take it?**



# OPENNESS TO TAKING A VACCINE

October 2-4



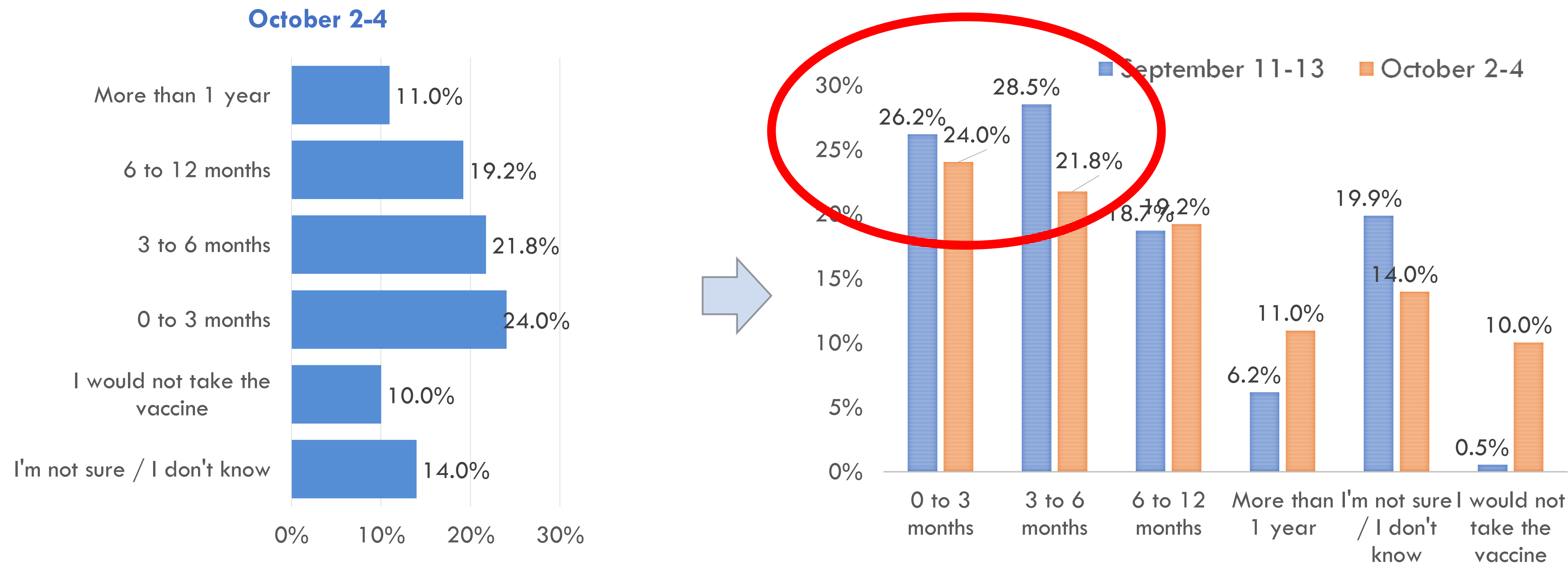
**Question:** If a COVID-19 vaccine is developed later this year (or early next year) and is approved for use, would you take it?



**Question: How long would you prefer to wait before taking the vaccine? (Select one)**



# HOW LONG THEY WILL WAIT BEFORE TAKING A VACCINE?



**Question:** How long would you prefer to wait before taking the vaccine? (Select one)



## KEY TAKEAWAYS

- Half of American travelers are still planning to avoid travel until the Coronavirus situation is more resolved, a figure that has remained consistent for the last 5 weeks
- For those still engaging in travel avoidance, the wide distribution of an effective COVID-19 vaccine is far and away their top ranked condition for being comfortable traveling again
- Unfortunately, willingness to take a vaccine that is developed in the next few months has declined somewhat among the general American traveling population

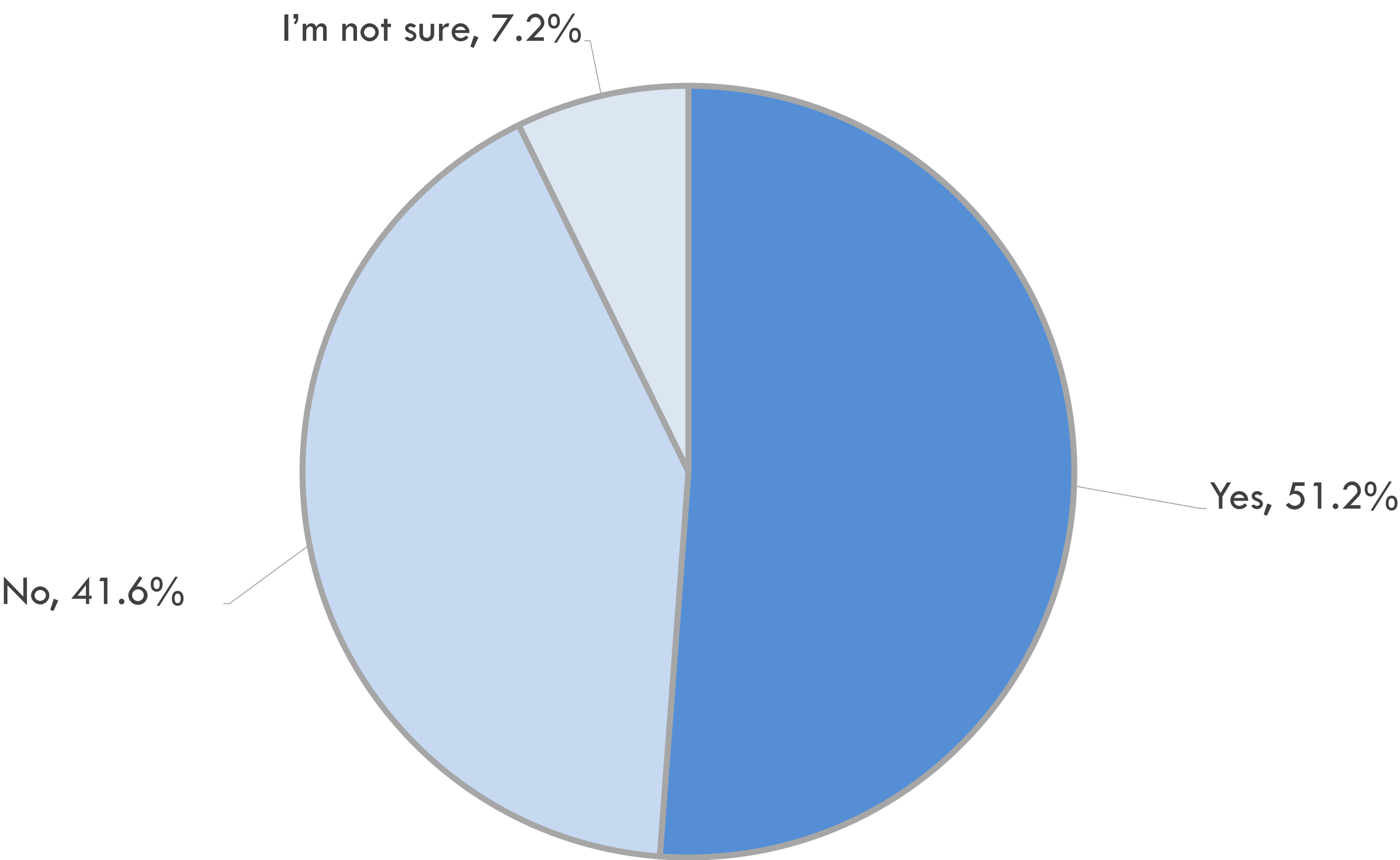


# THE RETURN OF BUSINESS TRAVEL

# DO EMPLOYEES AT THEIR COMPANIES TRAVEL FOR BUSINESS?

**Question:** Prior to the COVID-19 pandemic, did people at the company/organization you work for travel for business purposes? (Select one)

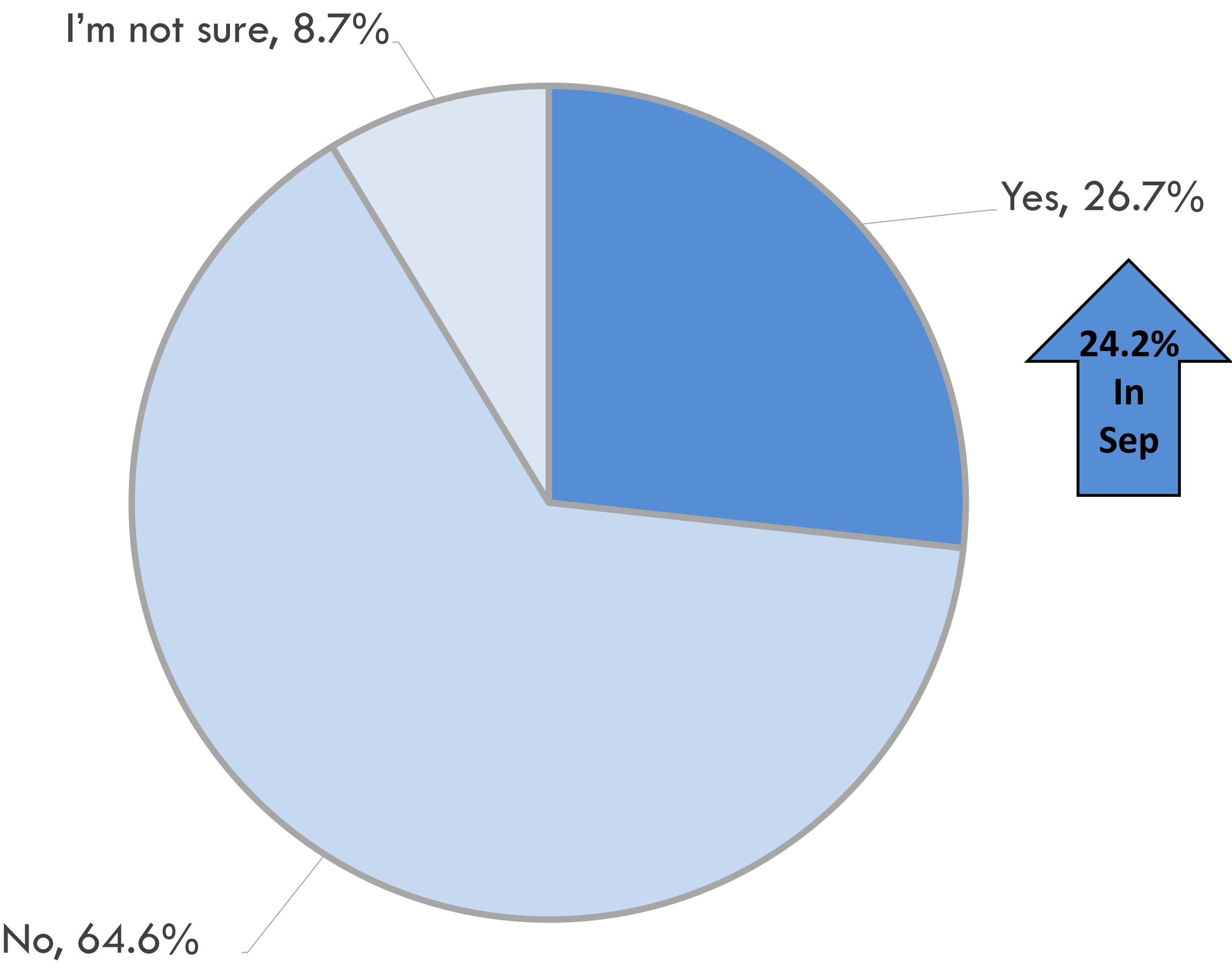
(Base: Wave 30 data. Employed respondents, 928 completed surveys. Data collected Oct 2-4, 2020)



# ARE COWORKERS TRAVELING

**Question:** To your knowledge, have people at the company/organization you work for started traveling for business purposes again?

(Base: Wave 30 data. Respondents working at companies whose employees travel for business, 482 completed surveys. Data collected Oct 2-4, 2020)

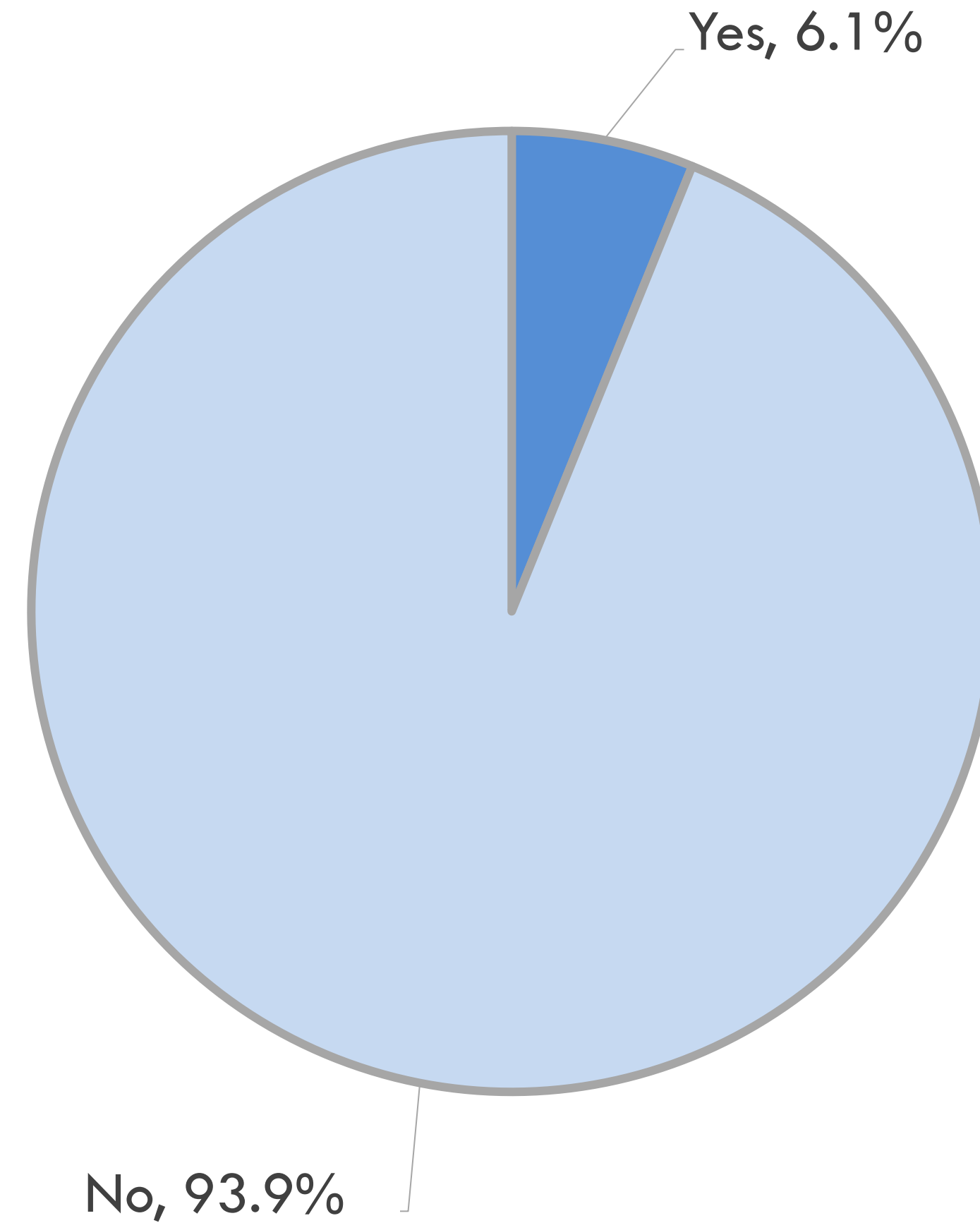


# ANNOUNCEMENTS ON RESUMING BUSINESS TRAVEL

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**Question:** Has the company/organization you work for given any indication on when company business travel will begin again?

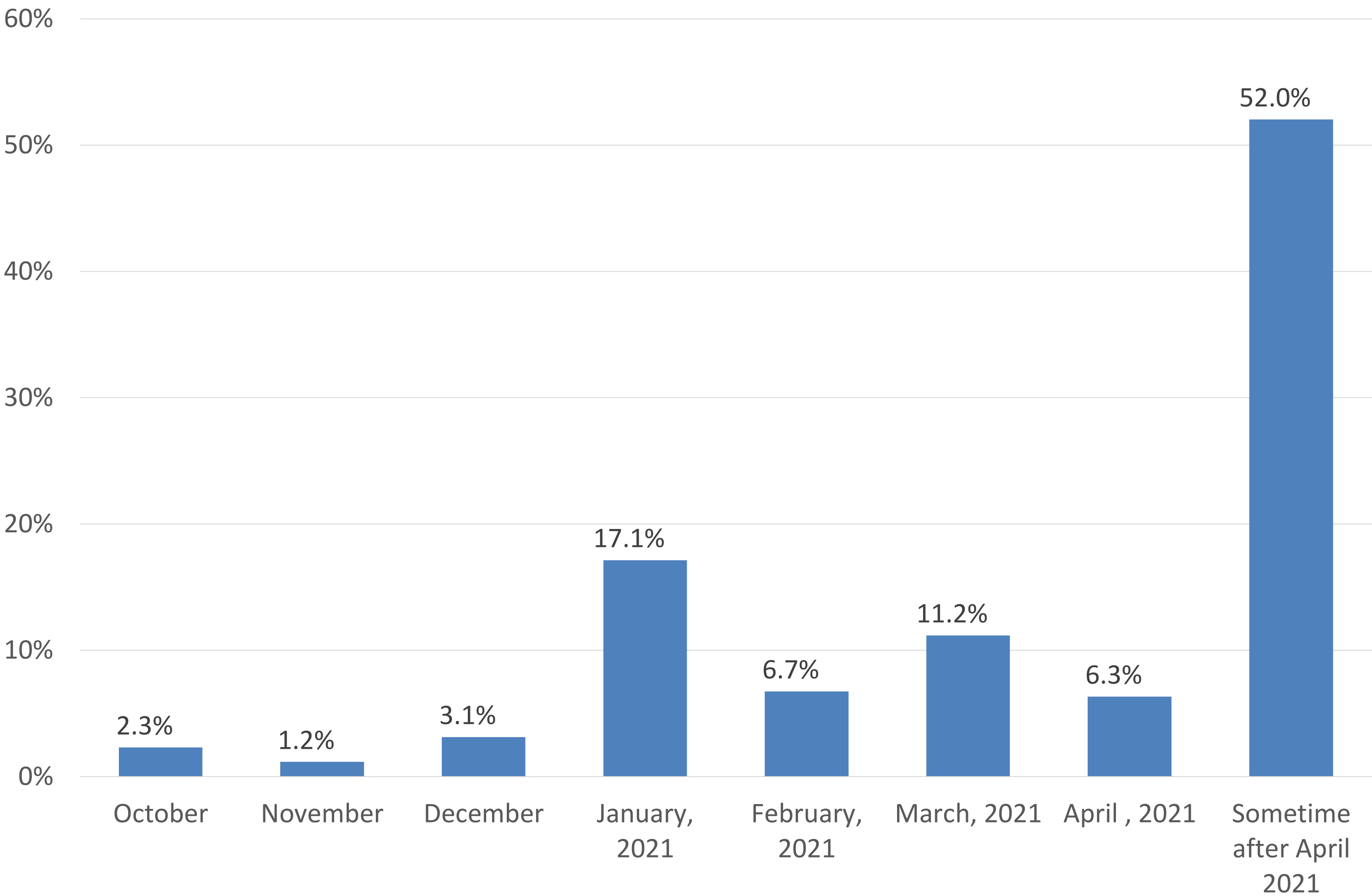
*(Base: Wave 30 data. Respondents at companies that have not resumed business travel, 355 completed surveys. Data collected Oct 2-4, 2020)*



# WHEN WILL BUSINESS TRAVEL BEGIN AGAIN

**Question:** Which month do you anticipate company/organization you work for will begin traveling for business again?

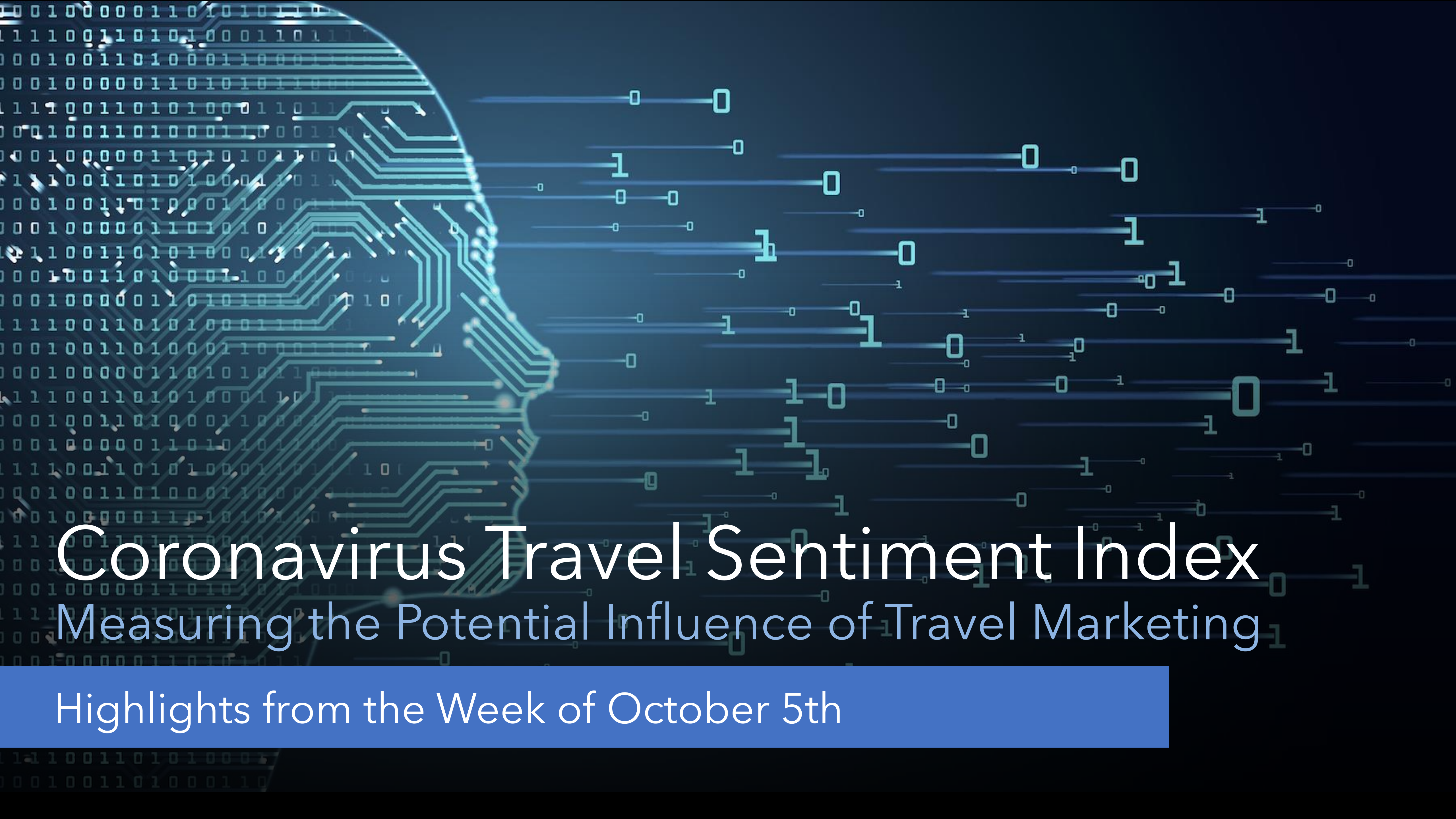
(Base: Wave 30 data. Respondents at companies that have not resumed business travel, 355 completed surveys. Data collected Oct 2-4, 2020)





# KEY TAKEAWAYS

- Business travel resumption has increased modestly in the past month
- From the perspective of employees at companies not yet back to business travel, this travel is not going to return until after April



# Coronavirus Travel Sentiment Index

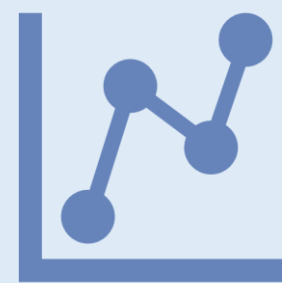
## Measuring the Potential Influence of Travel Marketing

Highlights from the Week of October 5th

# What is a Predictive Index?



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



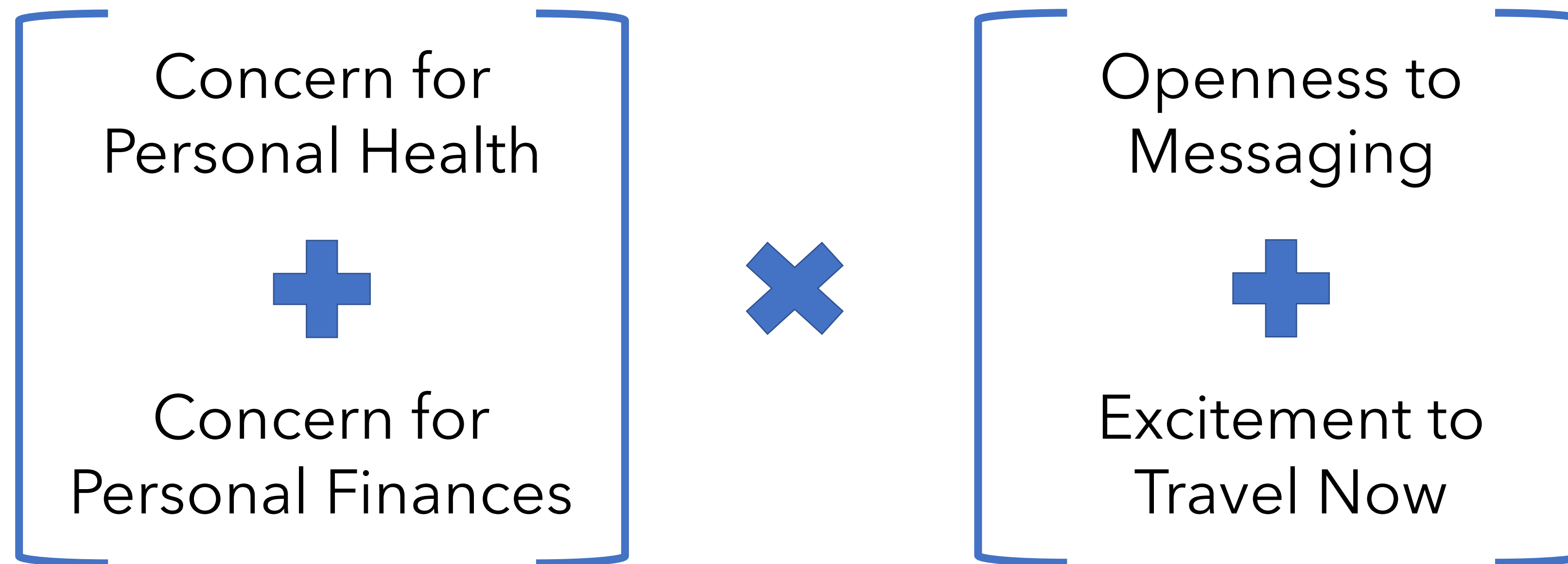
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

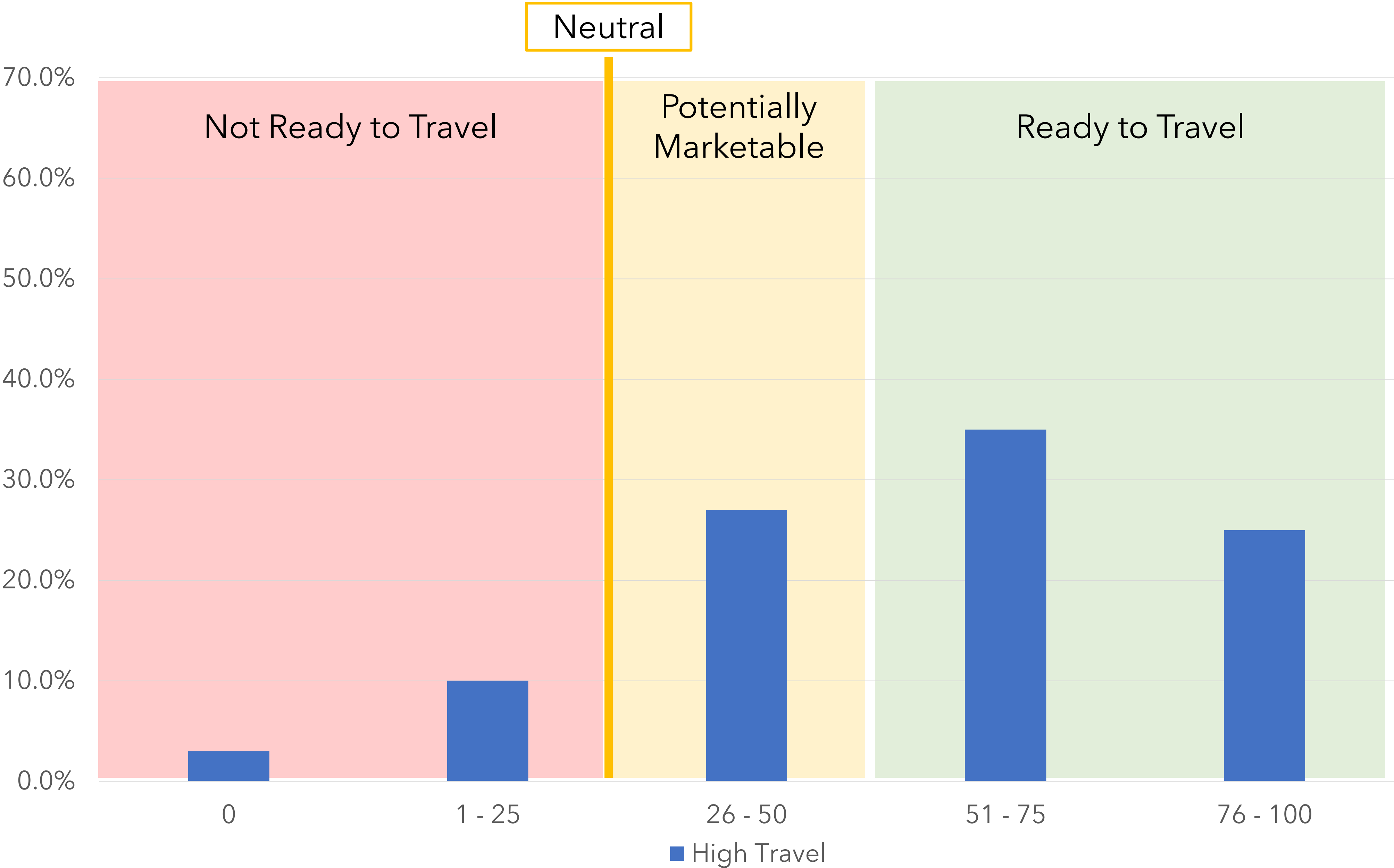
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

# Predictive Index Formula



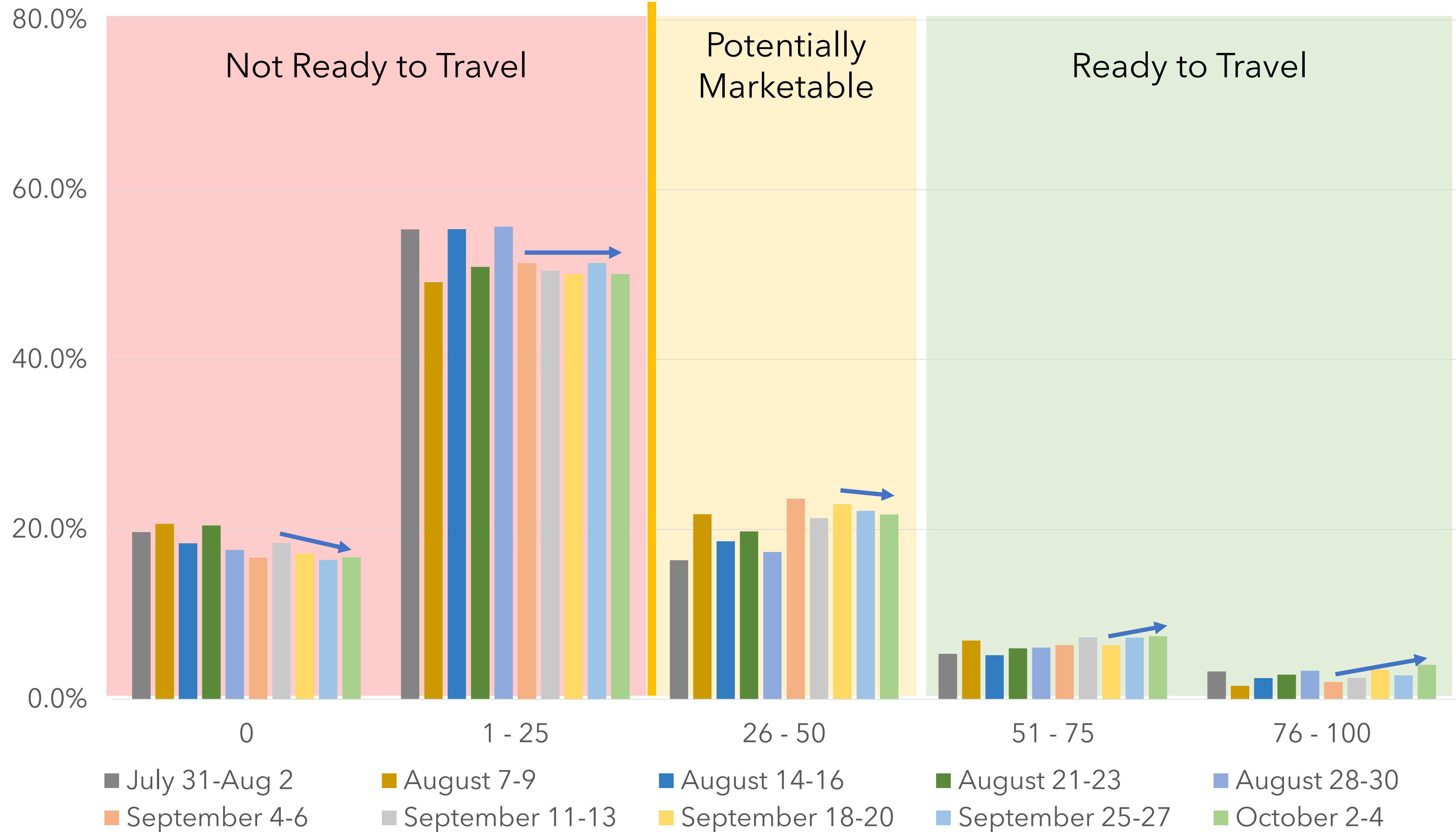
\*Normalized to a 100pt scale

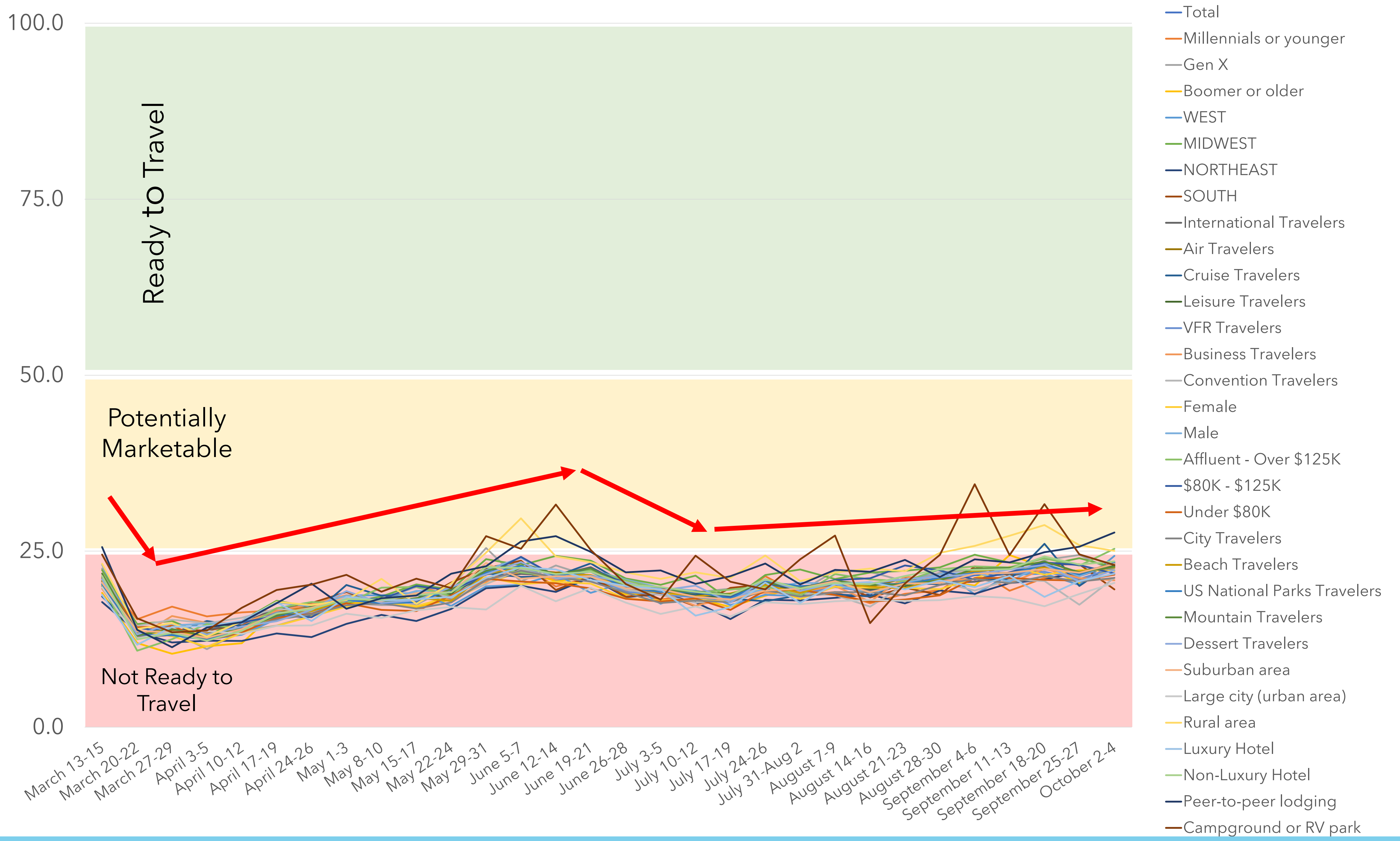
# Healthy Travel Outlook



# Travel Outlook

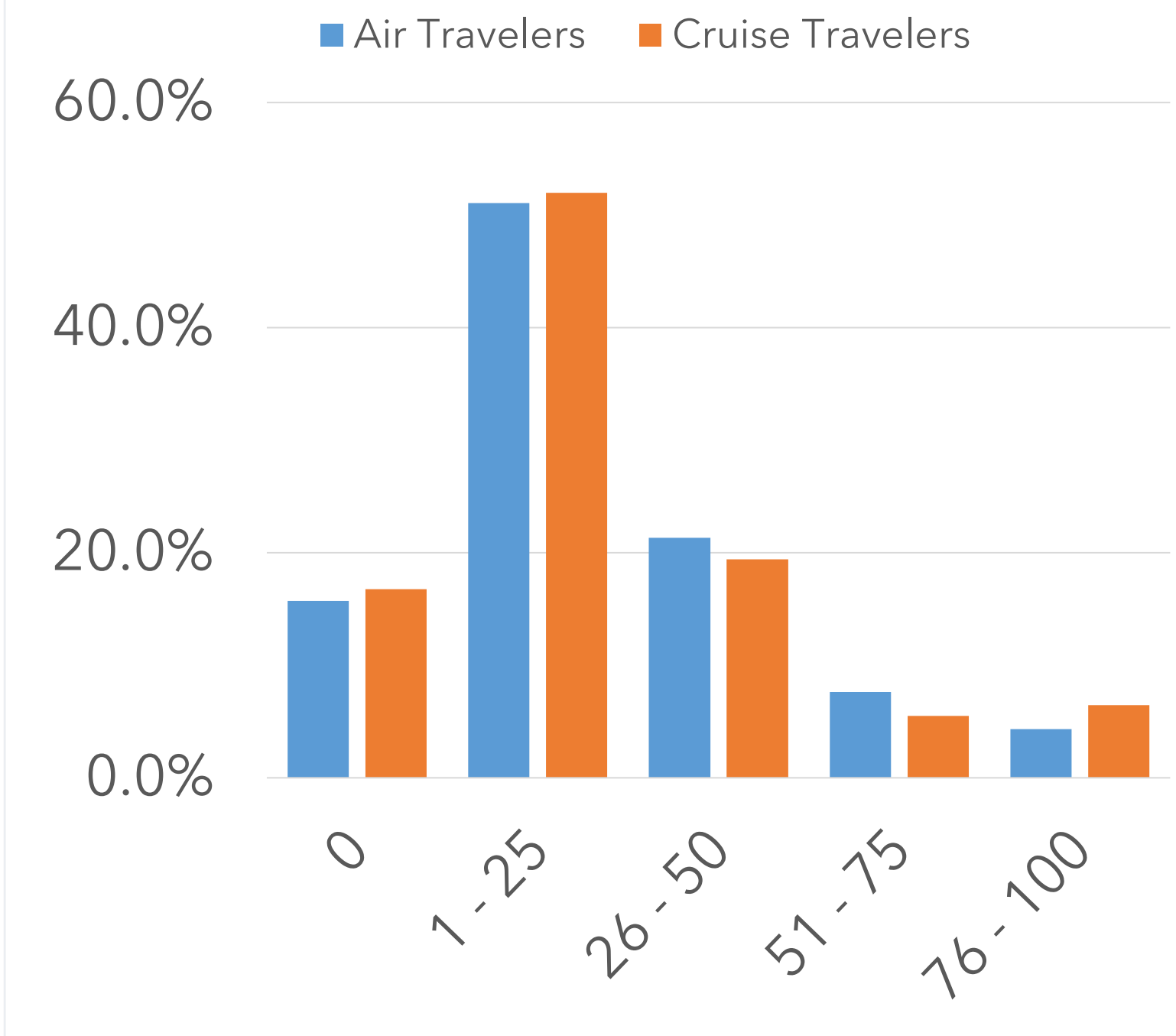
Neutral



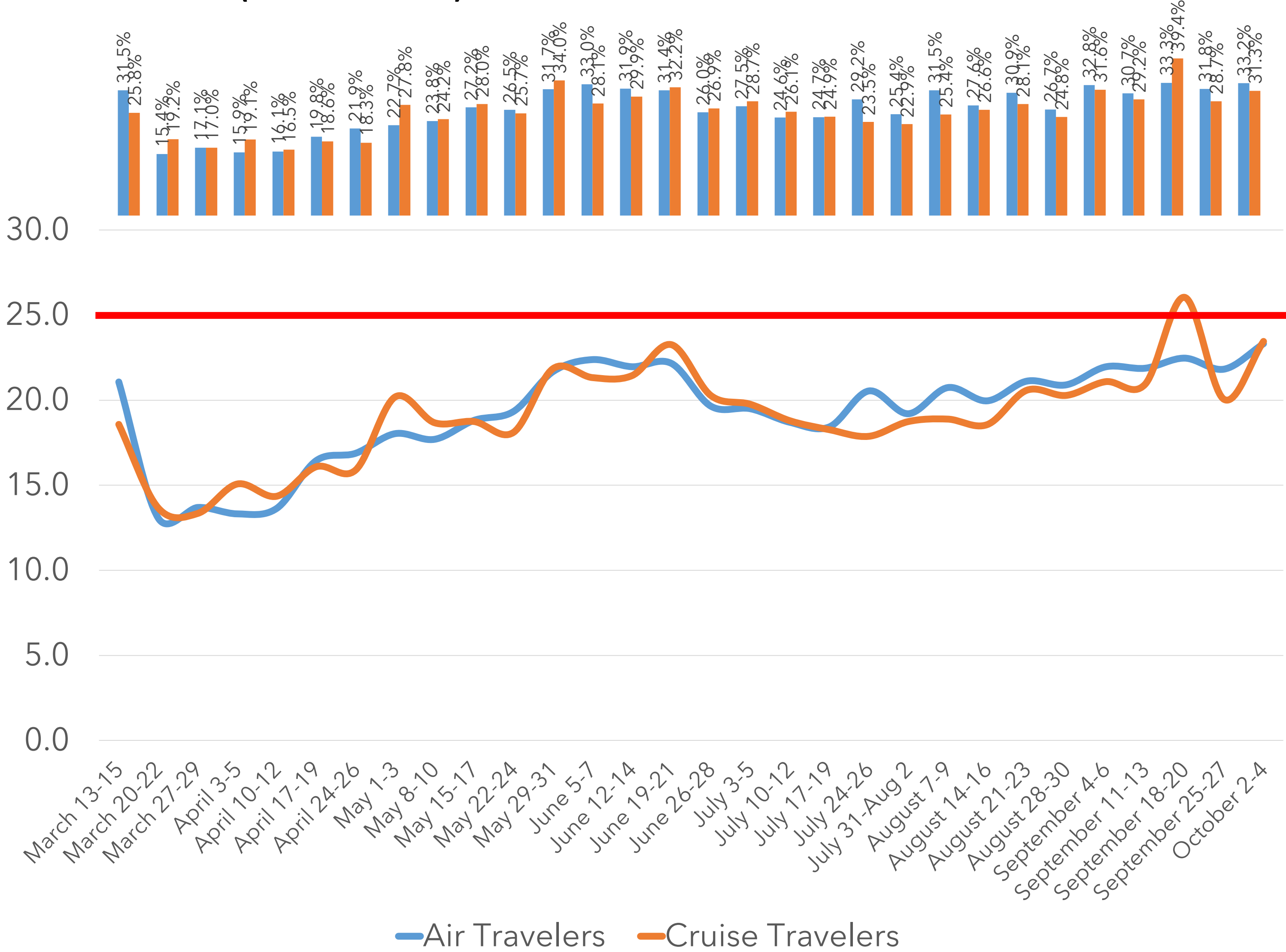


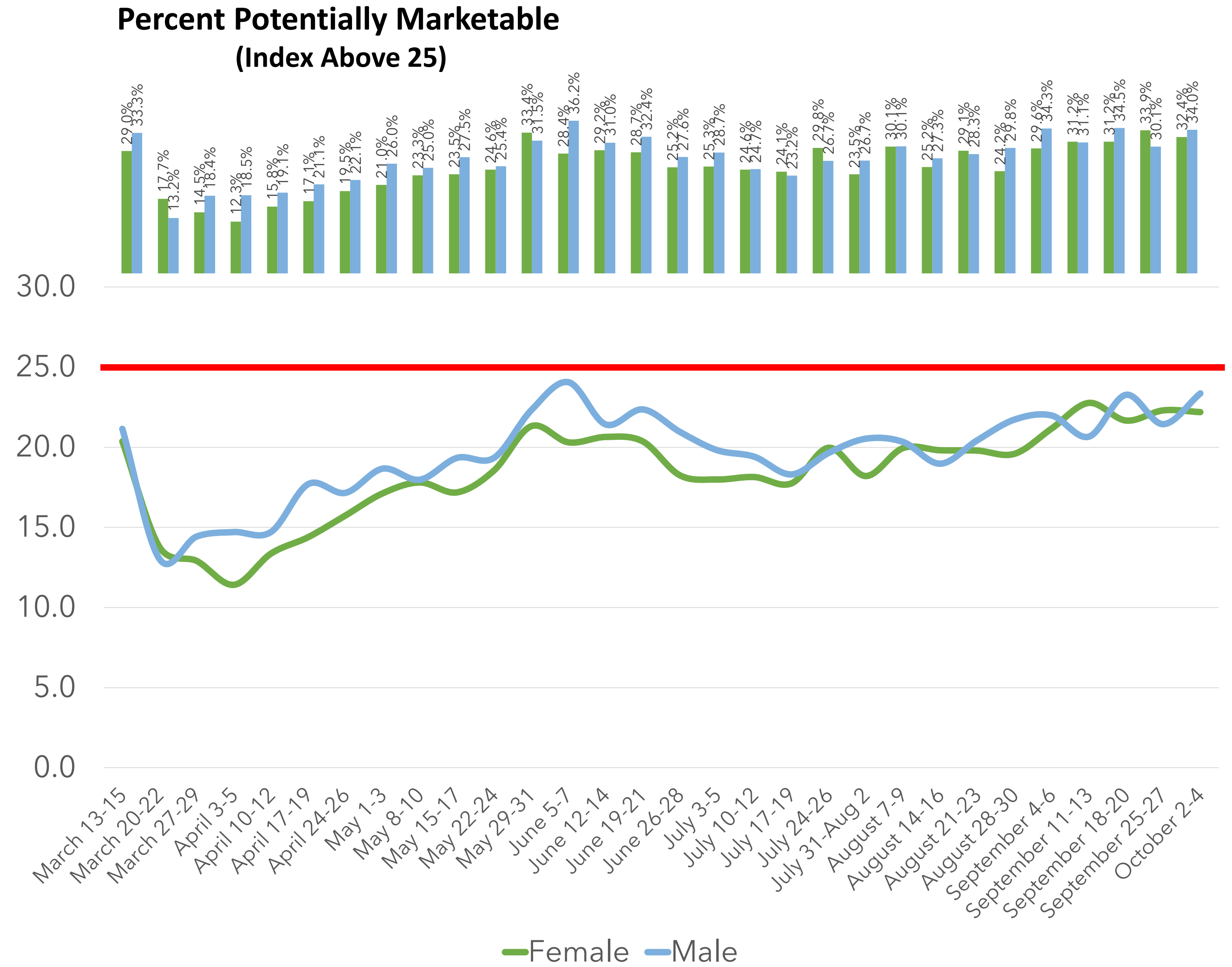
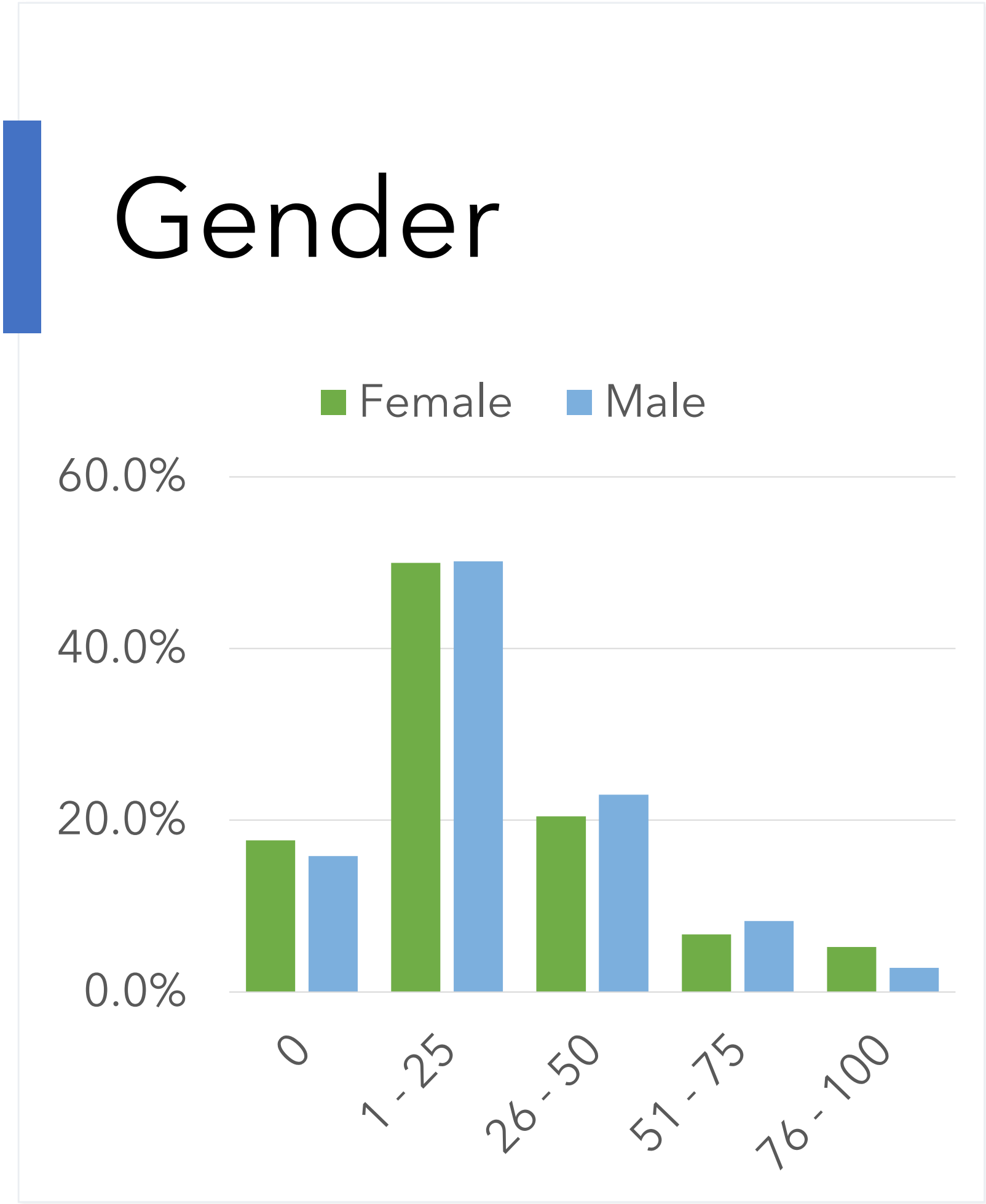


# Airline and Cruise Travelers

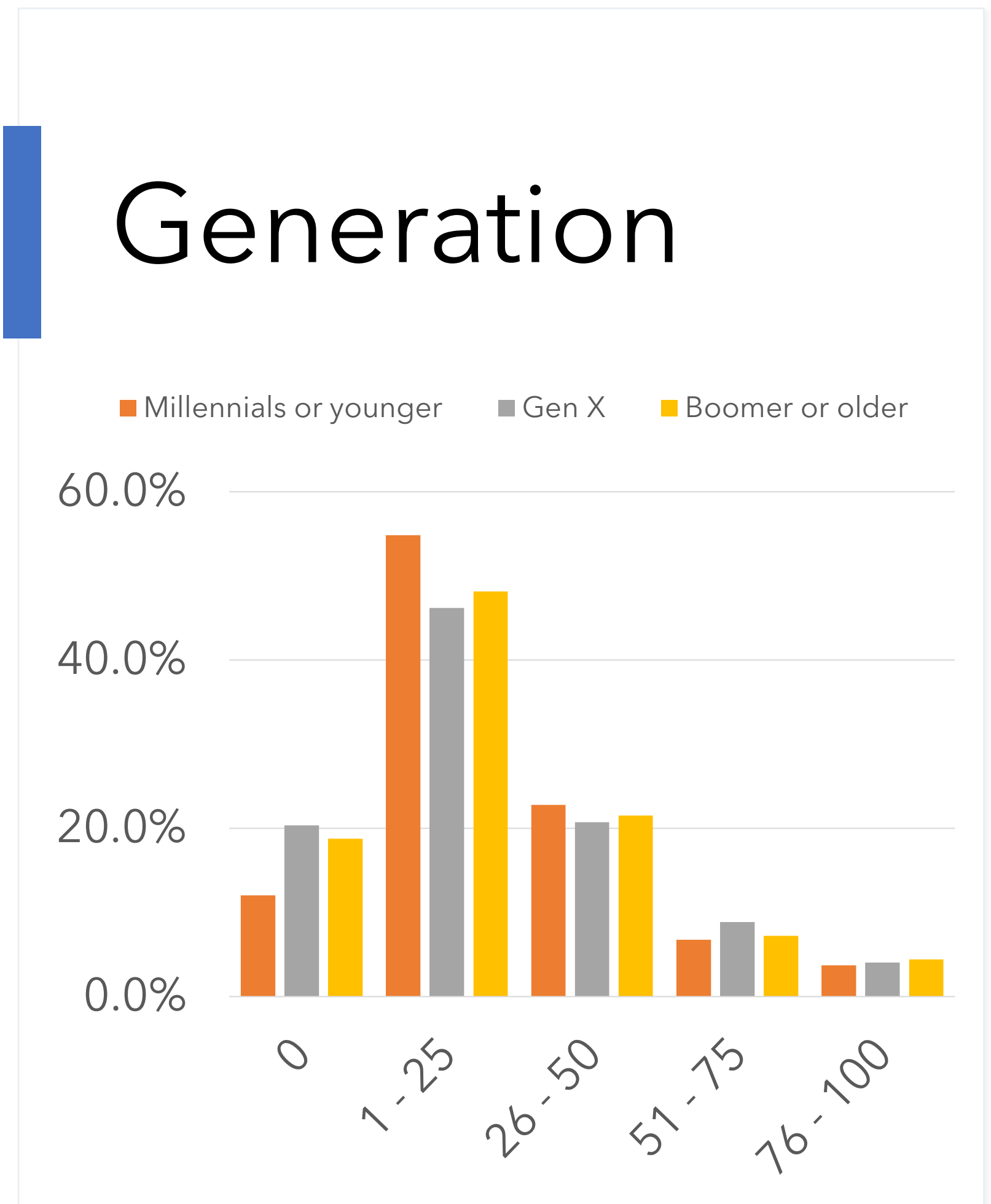


Percent Potentially Marketable  
(Index Above 25)

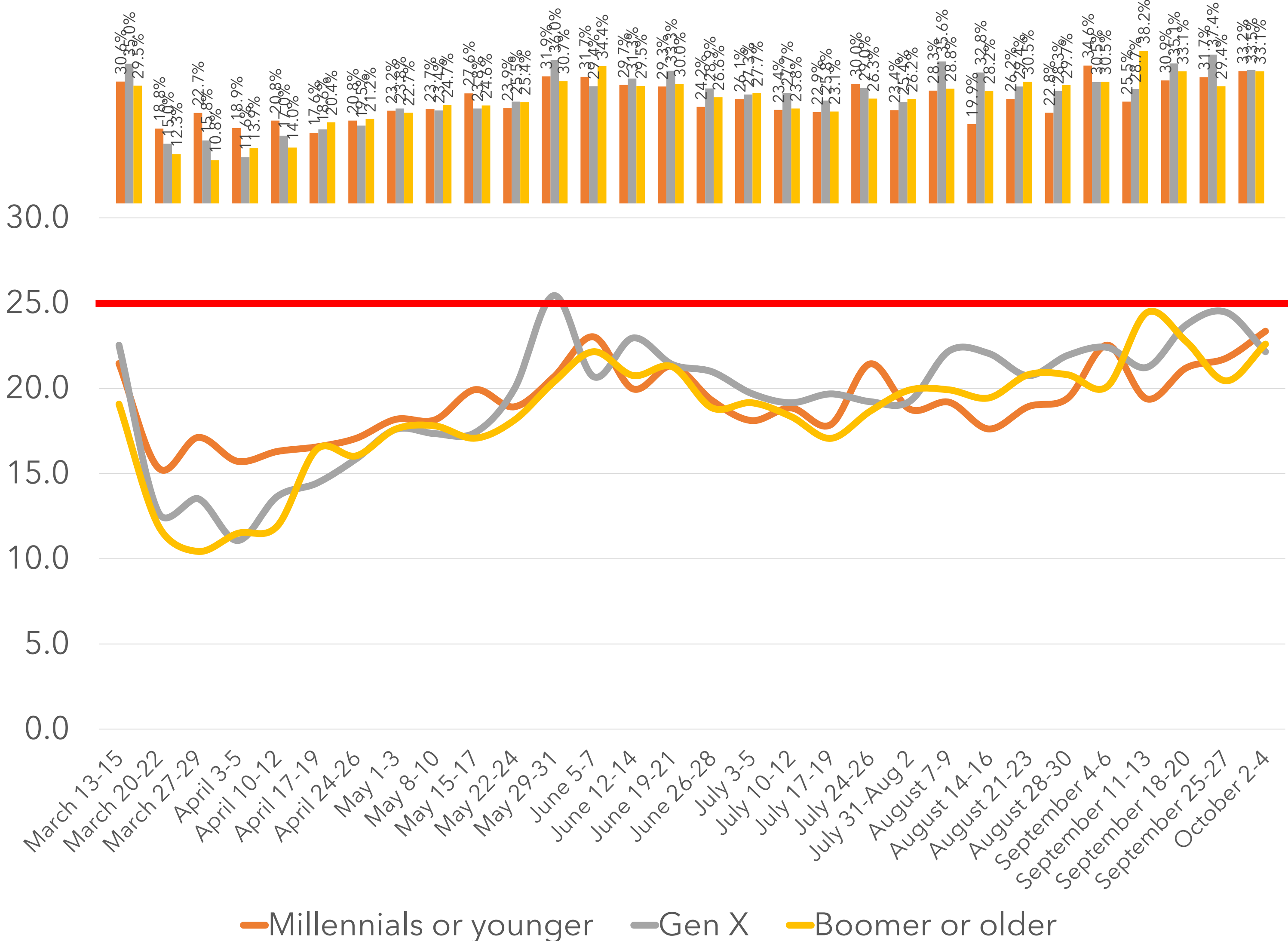




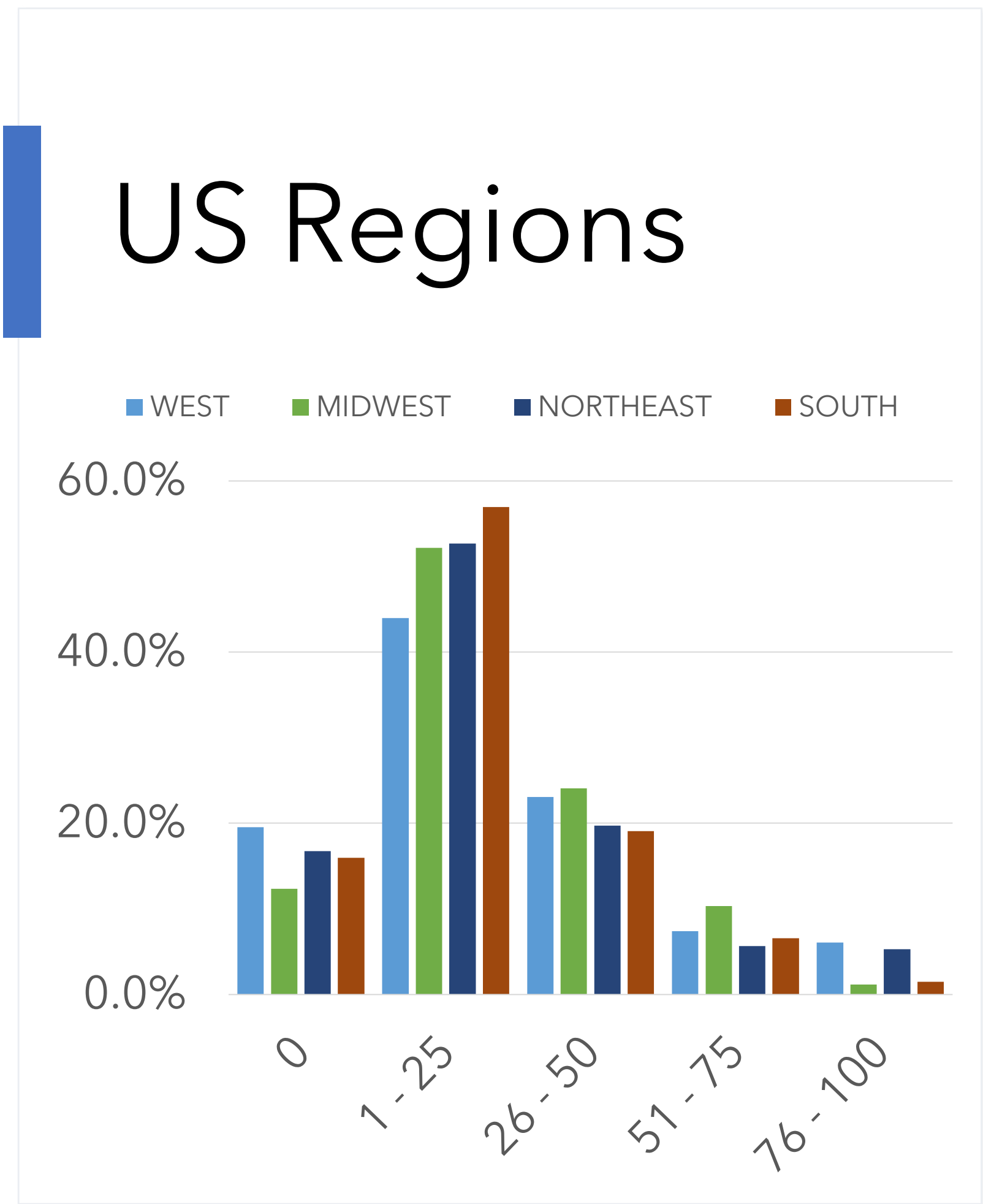
# Generation



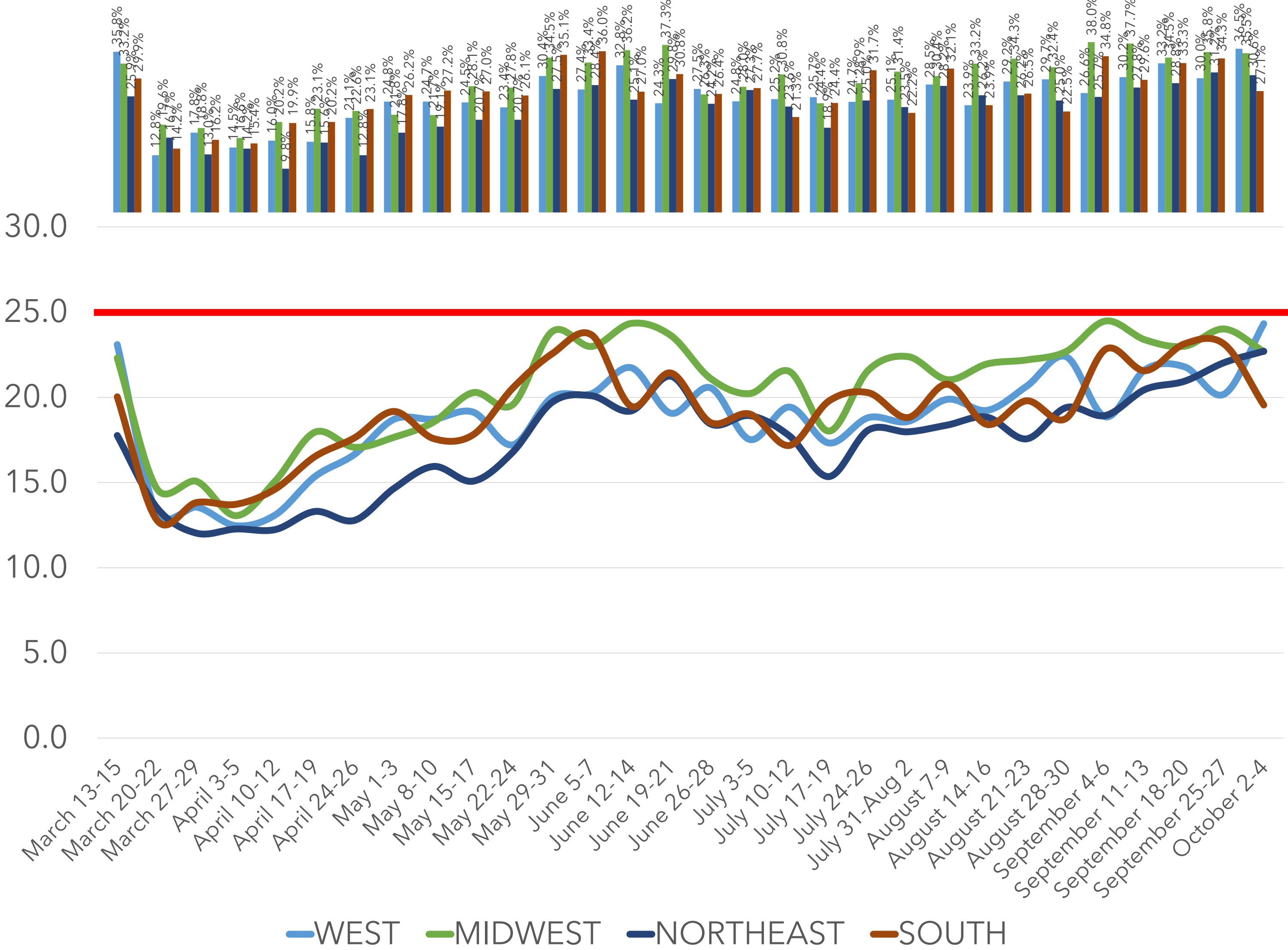
## Percent Potentially Marketable (Index Above 25)



# US Regions



## Percent Potentially Marketable (Index Above 25)



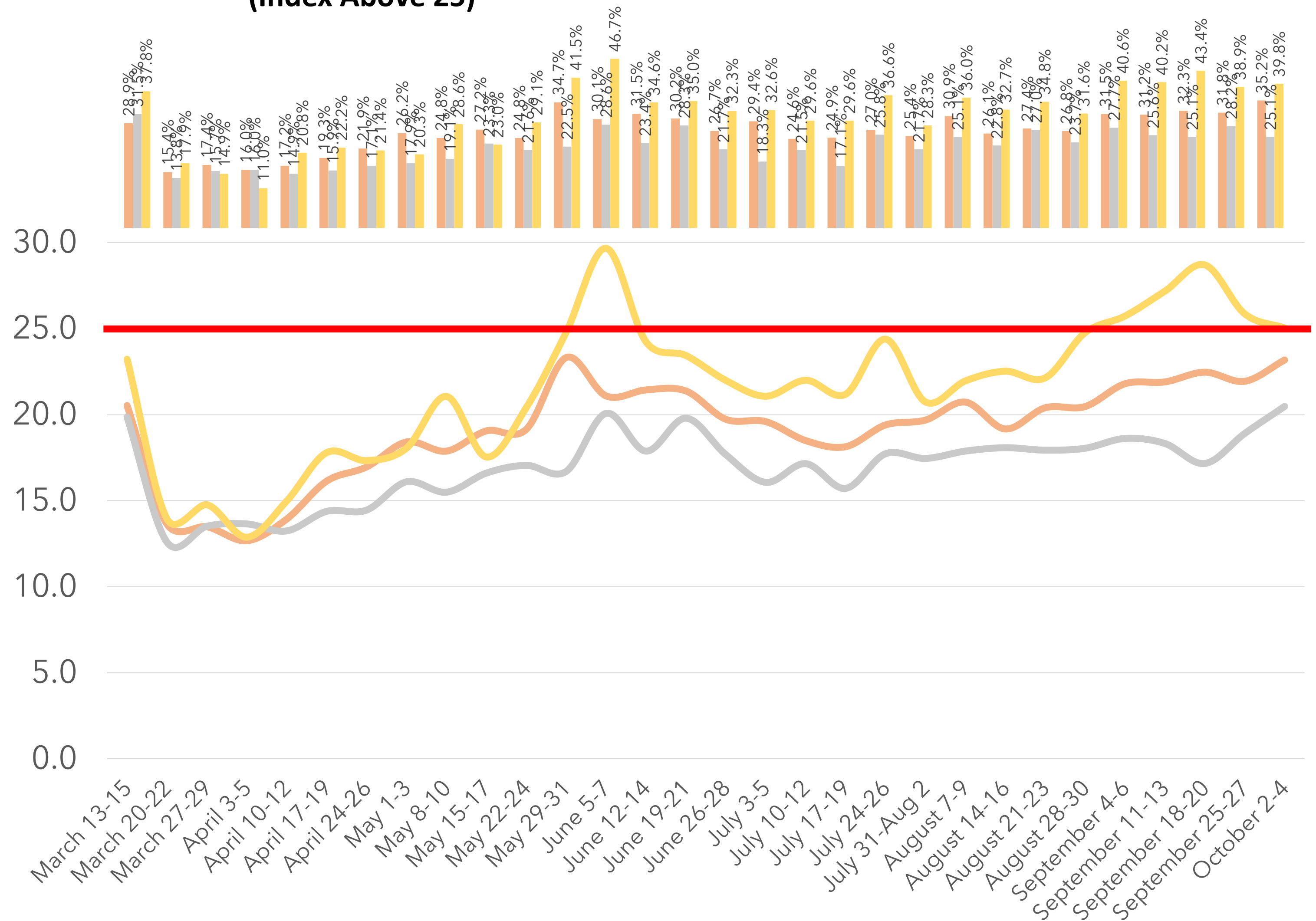
# Residence Type

Suburban area Large city (urban area) Rural area

80.0%  
60.0%  
40.0%  
20.0%  
0.0%

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

## Percent Potentially Marketable (Index Above 25)

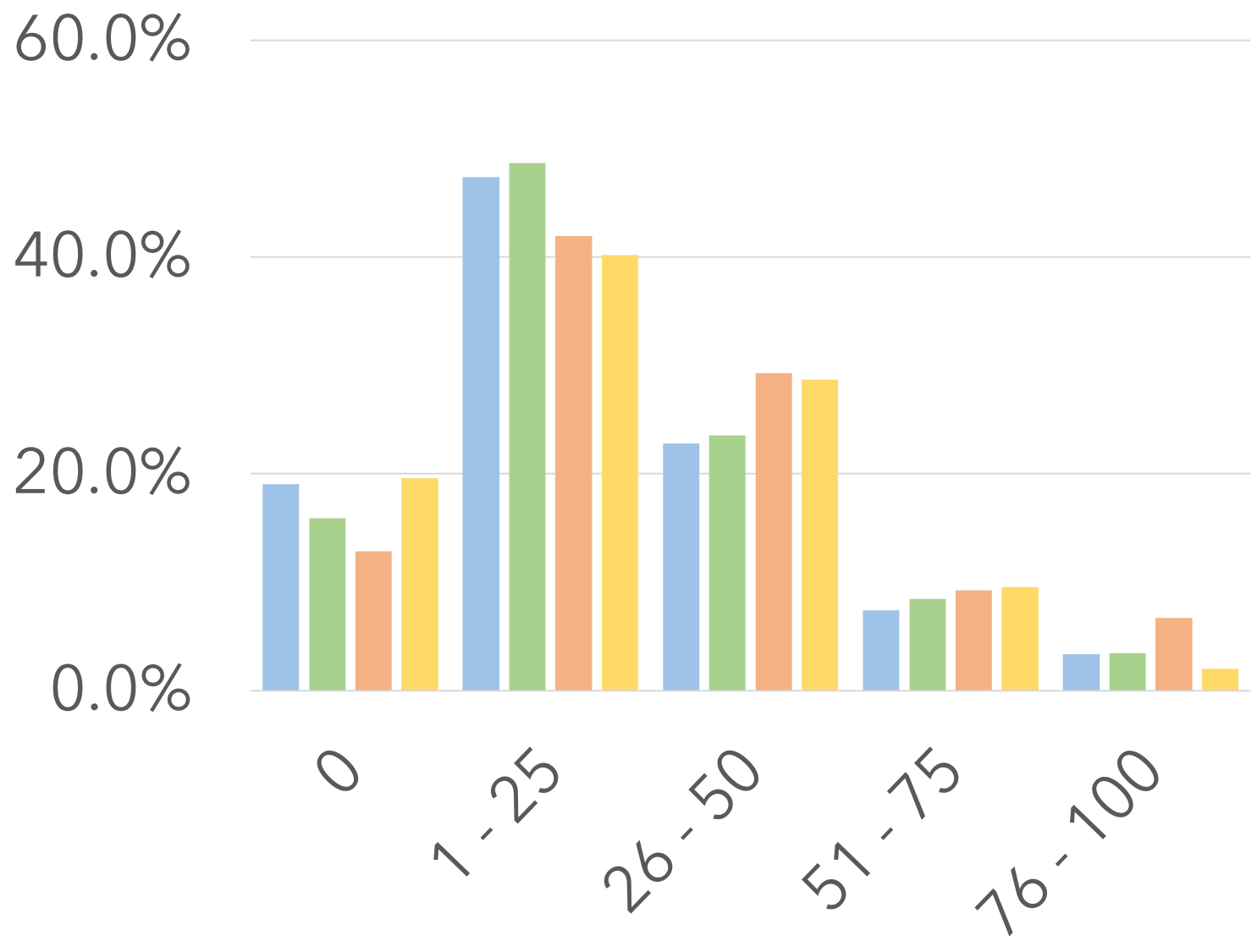


Suburban area Large city (urban area) Rural area

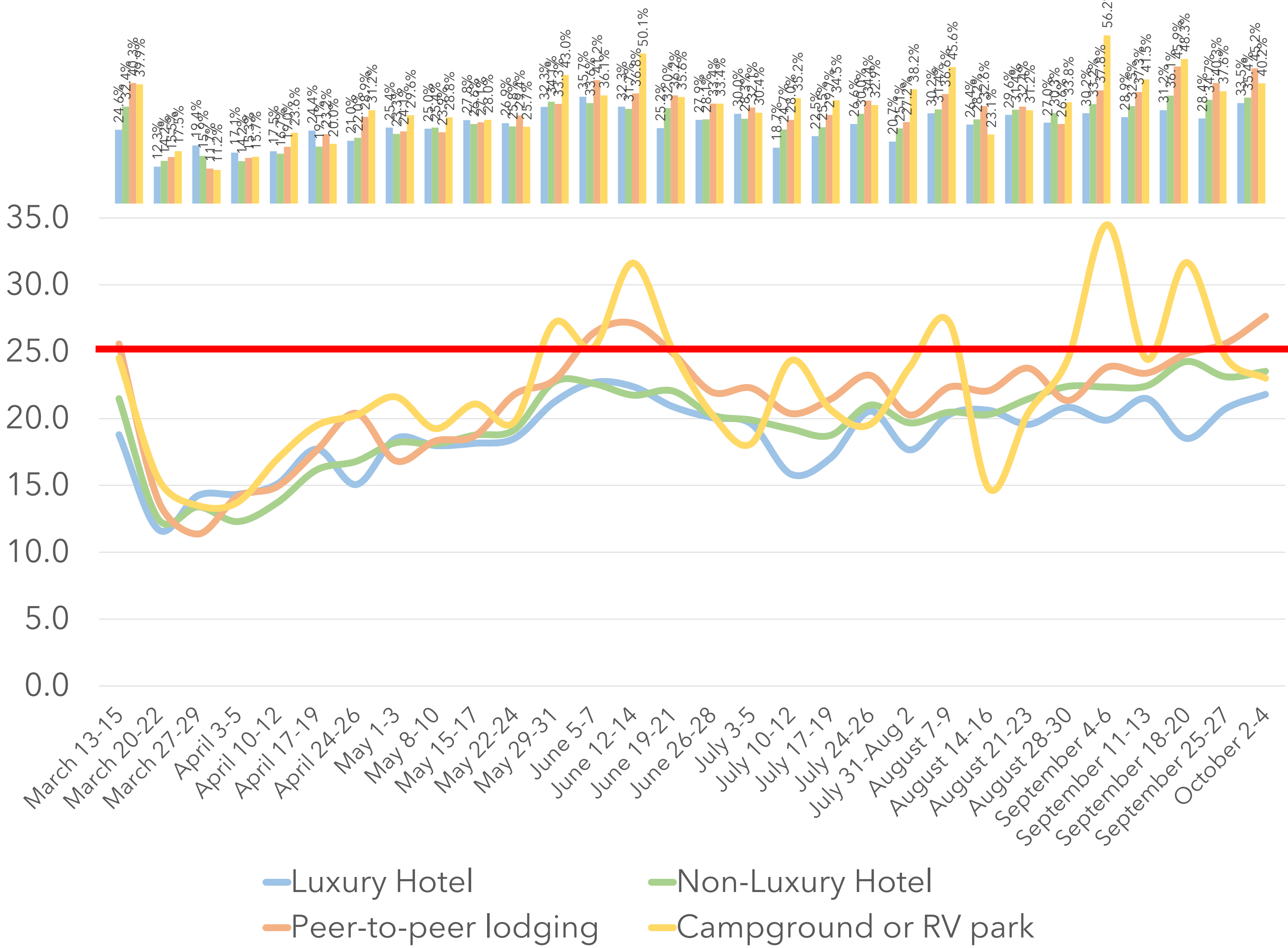


# Lodging Preference

- Luxury Hotel
- Peer-to-peer lodging
- Non-Luxury Hotel
- Campground or RV park



## Percent Potentially Marketable (Index Above 25)





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[DestinationAnalysts.com/Support](https://DestinationAnalysts.com/Support)

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want us to explore?**

**Send suggestions or requests for questions to:**

**[Info@DestinationAnalysts.com](mailto:Info@DestinationAnalysts.com) &  
[Myha@DestinationAnalysts.com](mailto:Myha@DestinationAnalysts.com)**

# 15-minute presentations for your board and stakeholders

[info@destinationanalysts.com](mailto:info@destinationanalysts.com)



# We Can Help You

- Visitor & Target Audience Profiles
- Brand Performance
- Visitor Activity Analysis & Segmentation
- Persona Research
- Resident + Stakeholder Research
- Advertising Testing
- Grant Support

**[info@destinationanalysts.com](mailto:info@destinationanalysts.com)**



# Resources for Tourism Advocacy & Recovery

[destinationanalysts.com](https://destinationanalysts.com)

# ROI

THIS YEAR ▼ 32.8876  
▲ 42.9841

First quarter  
Jan-Mar

Second quarter  
Apr-Jun

Third quarter  
Jul-Sep



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

# Research & Data Support for Grant Applications & Recovery Programs

**[info@destinationanalysts.com](mailto:info@destinationanalysts.com)**

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

**Webinar recording  
available on our website:**

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