

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

PRESENTATION OF FINDINGS
WEEK OF AUGUST 31st, 2020

Destination  Analysts





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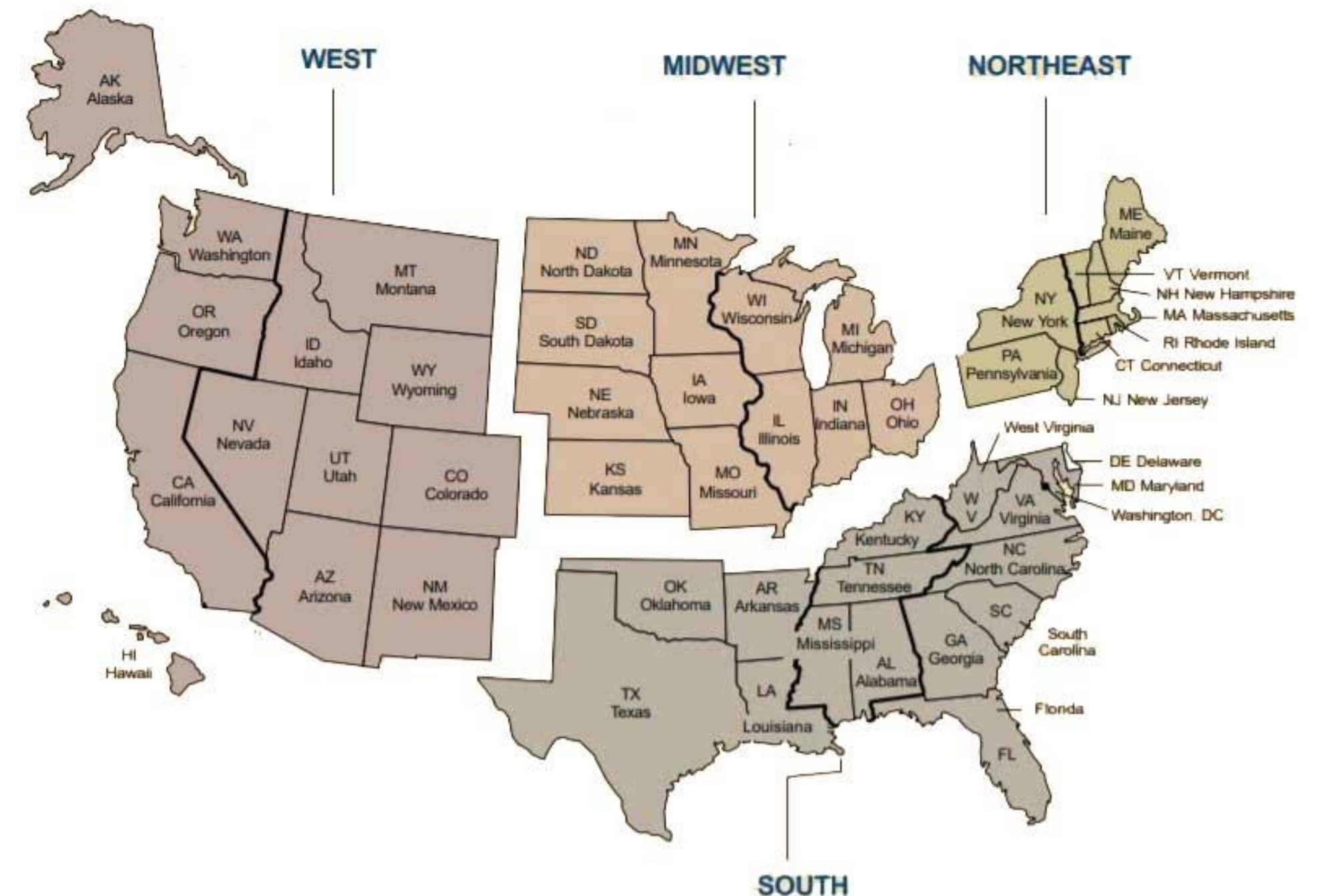
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RESEARCH OVERVIEW & METHODOLOGY

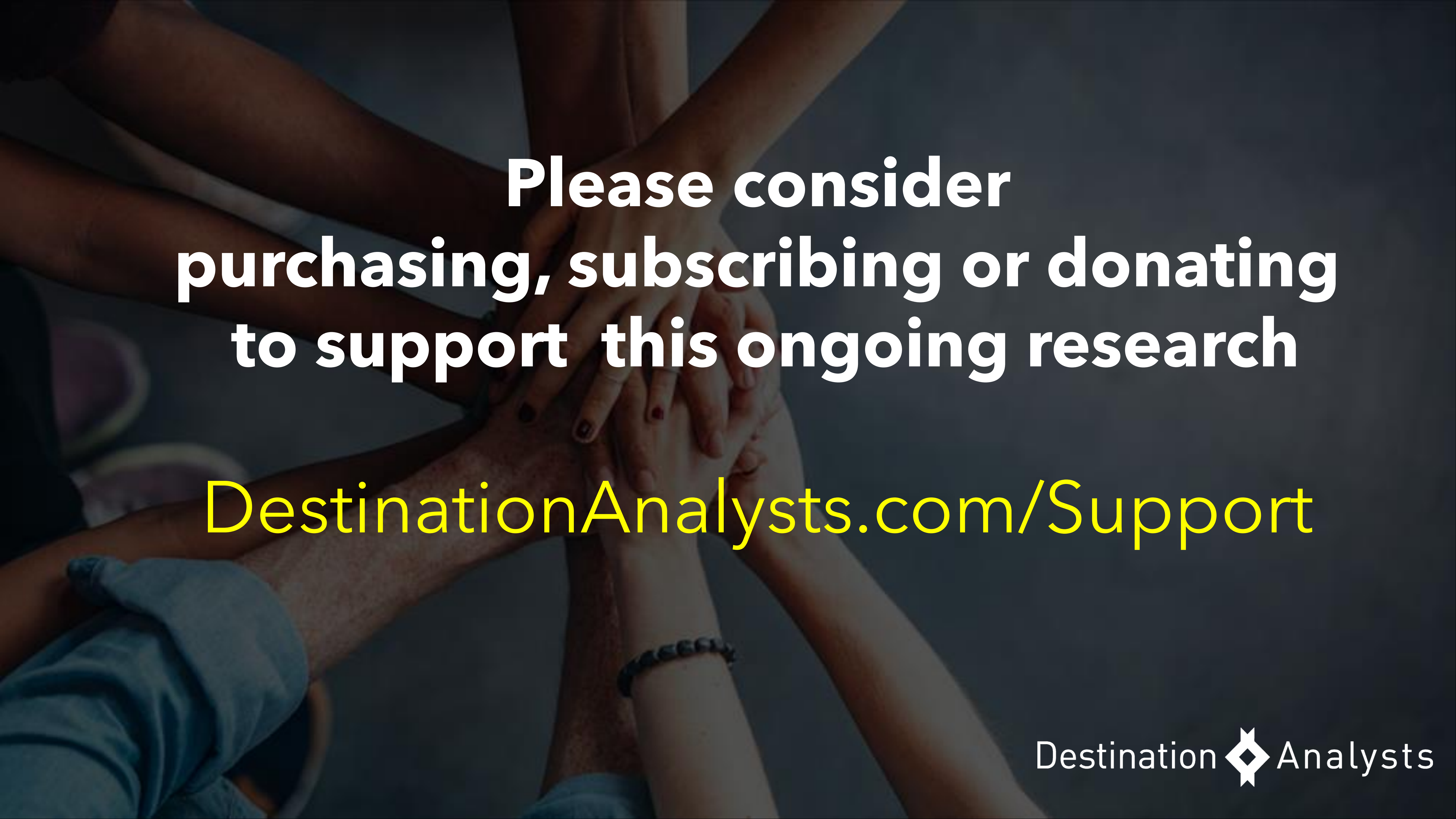
- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 25 data (fielded August 29th-31st) will be 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



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 has a warm, yellowish-brown hue.

Independent, unbiased
research



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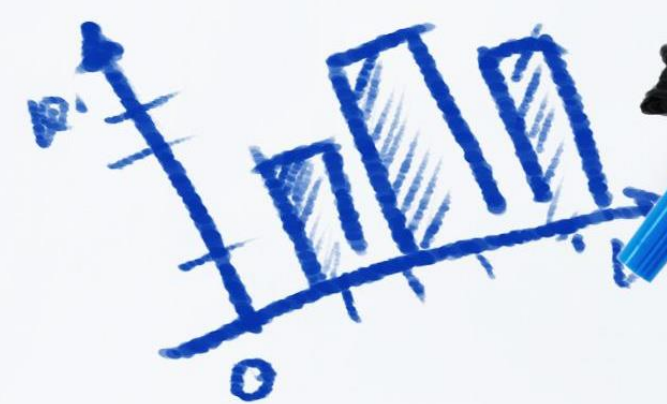
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New coronavirus cases are down nationwide. But the US is still averaging more than 900 deaths a day

By Dakin Andone, CNN
Updated 2:47 PM ET, Thu August 27, 2020



Medical correspondent calls new CDC guidelines 'ridiculous' 03:05

(CNN) — New coronavirus cases are down across the US about 12% on average over the last seven days compared to the previous week, but the nation is still averaging more than 900 deaths a day.

According to an analysis of data from Johns Hopkins University, cases are steadily declining in states hard-hit by Covid-19. Compared to last week, new cases are down in Arizona about 36%, California and Texas have seen a decrease of 29%, and Florida's numbers are down 26%.



Related Video: Cases falling nationwide, but rising in heartland 02:31

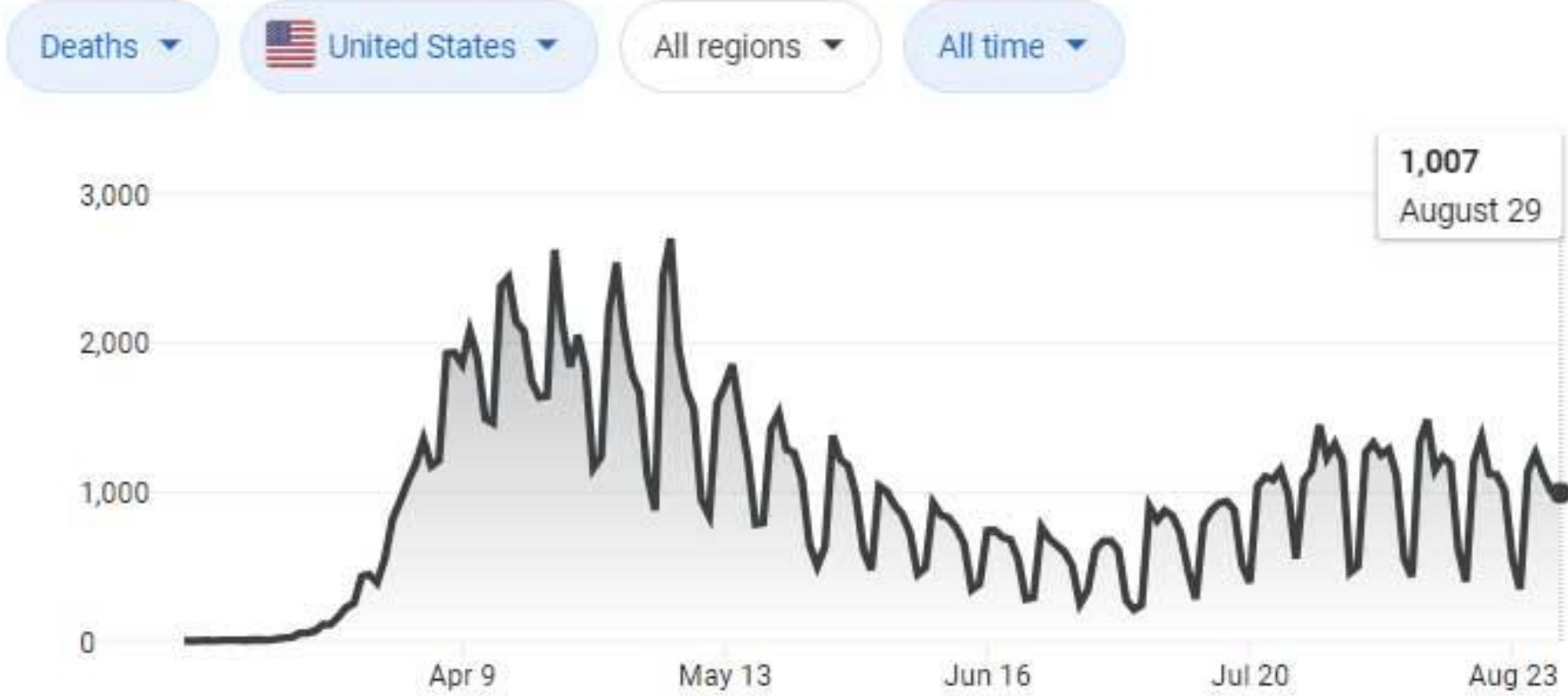
But new cases are rising across the Midwest, including in Indiana, Iowa, Kansas and North Dakota, each of which is experiencing its peak seven-day average for daily new cases.

North Dakota claimed the mantle of the state with the highest per capita rate of new cases in the US with a seven-day average of 28.10 new cases per 100,000. Iowa and Kansas both saw record highs Wednesday for new cases reported.

Also on Wednesday, the US reported 44,109 cases and 1,222 deaths, according to Johns Hopkins.

The number of deaths related to the coronavirus in the US topped 180,000 on Thursday, according to the JHU data. More than 5.8 million cases have been reported.

Daily change



Each day shows deaths reported since the previous day · Updated less than 10 mins ago · Source: [Wikipedia](#) · [About this data](#)

Cases

Total United States All regions		
Cases	Deaths	
5.97M	183K	
+44,258	+870	
Location	Cases ↓	Deaths
California	702K +4,110	12,906 +70
Texas	634K +5,342	12,733 +118

CORONAVIRUS

Global coronavirus cases top 25 million

The U.S. leads the count with 5.9 million cases



BURBANK, CALIFORNIA — AUGUST 24: Mend Urgent Care workers wearing personal protective equipment perform drive-up COVID-19 testing for students and faculty on the first day of school at Woodbury University on August 24, 2020 in Burbank, California. Most California schools are have gone virtual while others are placing physical distancing and other protocols like testing to keep in-person classes in session. (Photo by Kevin Winter/Getty Images)

by: The Associated Press

Posted: Aug 30, 2020 / 09:27 AM EDT / Updated: Aug 30, 2020 / 09:27 AM EDT

WASHINGTON (AP) — The number of confirmed coronavirus cases globally has topped 25 million, according to a tally kept by Johns Hopkins University.

The U.S. leads the count with 5.9 million cases, followed by Brazil with 3.8 million and India with 3.5 million.

The real number of people infected by the virus around the world is believed to be much higher — perhaps 10 times higher in the U.S., according to the Centers for Disease Control and Prevention — given testing limitations and the many mild cases that have gone unreported or unrecognized.

Global deaths from COVID-19 stand at over 842,000, with the U.S. having the highest number with 182,779, followed by Brazil with 120,262 and Mexico with 63,819.

Europe fears second coronavirus wave as cases surge



Jacob Krutson



A representation of the coronavirus at a Berlin protest against Germany's virus restrictions on Aug. 28. Photo: Abdulhamid Hosbas/Anadolu Agency via Getty Images

Several European countries have reported a jump in new coronavirus cases in recent weeks after a drop in cases over June and July, according to [Johns Hopkins University data](#).

Why it matters: The surge could indicate that Europe is on the verge of a second wave, though currently fewer people are dying from the virus and new cases have needed less medical treatment than those who got it in the spring, according to the [Washington Post](#).

By the numbers: France experienced 7,462 new cases on Aug. 28, the largest jump since May 16.

- Germany reported around 1,737 cases and 3 deaths on Aug. 21, the highest increase in new cases since May 24.
- Italy had 1,460 cases on Aug. 28, its largest jump since April 1.
- Spain announced 9,779 cases on Aug. 28, which was a single day record for the country.

The big picture: The surge comes as almost every European country is planning to in-person schooling this school year with many starting next week. Public health officials worry that the classes could exacerbate the spike in cases, according to the Post.

[NATION](#)

'Small events add up to a lot': Limited gatherings quietly emerge as source of coronavirus infections

Jorge L. Ortiz USA TODAY

Published 9:00 a.m. ET Aug. 30, 2020 | Updated 9:25 a.m. ET Aug. 30, 2020



Couples held up by COVID-19 turn to micro weddings

Couples whose nuptials were put on hold by COVID-19 are turning to a fresh trend in the bridal industry: micro weddings. (July 29) [AP](#)

Images of packed beaches, lakes and bars have made the rounds on traditional and social media for much of the summer, drawing scorn from those concerned about the coronavirus spreading among those crowds.

Less prominent but also troubling are the growing instances of case clusters arising from smaller gatherings.

[Contact tracing](#) is yielding information about the sources of infections as the U.S., by far the world leader in [COVID-19 cases and deaths](#), continues to grapple with how to keep its population safe while propping up a flagging economy. More than 180,000 Americans have been killed by the disease.

The hasty reopening of businesses across much of the nation following the spring shutdown was largely blamed for a summer surge in infections, but it appears social functions of various sizes among relatives, friends and co-workers have been a contributing factor as well.

Public health experts are sounding the alarm as the Labor Day weekend approaches.

“People don’t think of it in the same way as the (President) Trump rally in Tulsa, a bunch of people on the beach or in the bars, but these small events add up to a lot. It’s just invisible,” said Dr. Peter Chin-Hong, a professor of medicine at the University of California-San Francisco who specializes in infectious diseases.

Over 1,000 students have tested positive for Covid-19 at University of Alabama since classes resumed

By [Hollie Silverman](#) and Dakin Andone, CNN
Updated 5:06 PM ET, Sat August 29, 2020



(CNN) — More than 1,000 students at the University of Alabama have tested positive for Covid-19 since classes resumed on the Tuscaloosa campus less than two weeks ago, according to the [University of Alabama System](#).

The UA System coronavirus dashboard notes another 158 cases were recorded on campus over the course of the year prior to August 18, bringing the total to 1,201 cases. Classes resumed August 19.

Ames, Iowa City COVID Outbreaks Are Worst In The World

Posted August 30th, 2020 at 10:49am by Pat Rynard



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Iowa's exploding COVID-19 outbreaks at state universities in Ames and Iowa City are now disasters that can only be fully measured on a global scale. Ames holds the distinction this morning as the worst coronavirus outbreak in the entire United States, while Iowa City is at third on the list. The per capita rates are worse than any individual country in the world, and appear to surpass any state in some of the other currently hardest-hit countries.

According to [the New York Times COVID-19 tracker](#), Ames has had 956 new cases in the past two weeks, while Iowa City has counted 1,489. In the past seven days, Story County's per capita infection rate is 797 per 100,000 people, with Johnson County coming in at 787 per 100,000.



American Airlines slashing flying capacity by 55 percent in October

BY JUSTINE COLEMAN · 08/30/20 01:20 PM EDT

451 COMMENTS

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Just In...

Trump compares police who use force to golfers who 'choke'
ADMINISTRATION — 2H 41M AGO

Pence told to be on standby to assume powers during Trump's abrupt Walter Reed visit: book
ADMINISTRATION — 2H 46M AGO

Top Senate Democrat requests German ambassador nomination pulled over past inflammatory comments
SENATE — 2H 52M AGO

Trump says Black Lives Matter is 'bad for Black people'
ADMINISTRATION — 3H 21M AGO

Kamala Harris does in



© Greg Nash

American Airlines will slash its flying capacity by 55 percent in October in the wake of the coronavirus pandemic's disruptions on the travel industry.

The airline plans to operate at 45 percent of its October schedule, compared to last year, an American Airlines spokesperson told The Hill.

The airline is reducing its operations as demand for travel continues to slump due to the pandemic and a slower season approaches with summer vacations coming to an end, [Bloomberg News reported](#). Since March, travel has fallen to less than a third of the level in 2019, according

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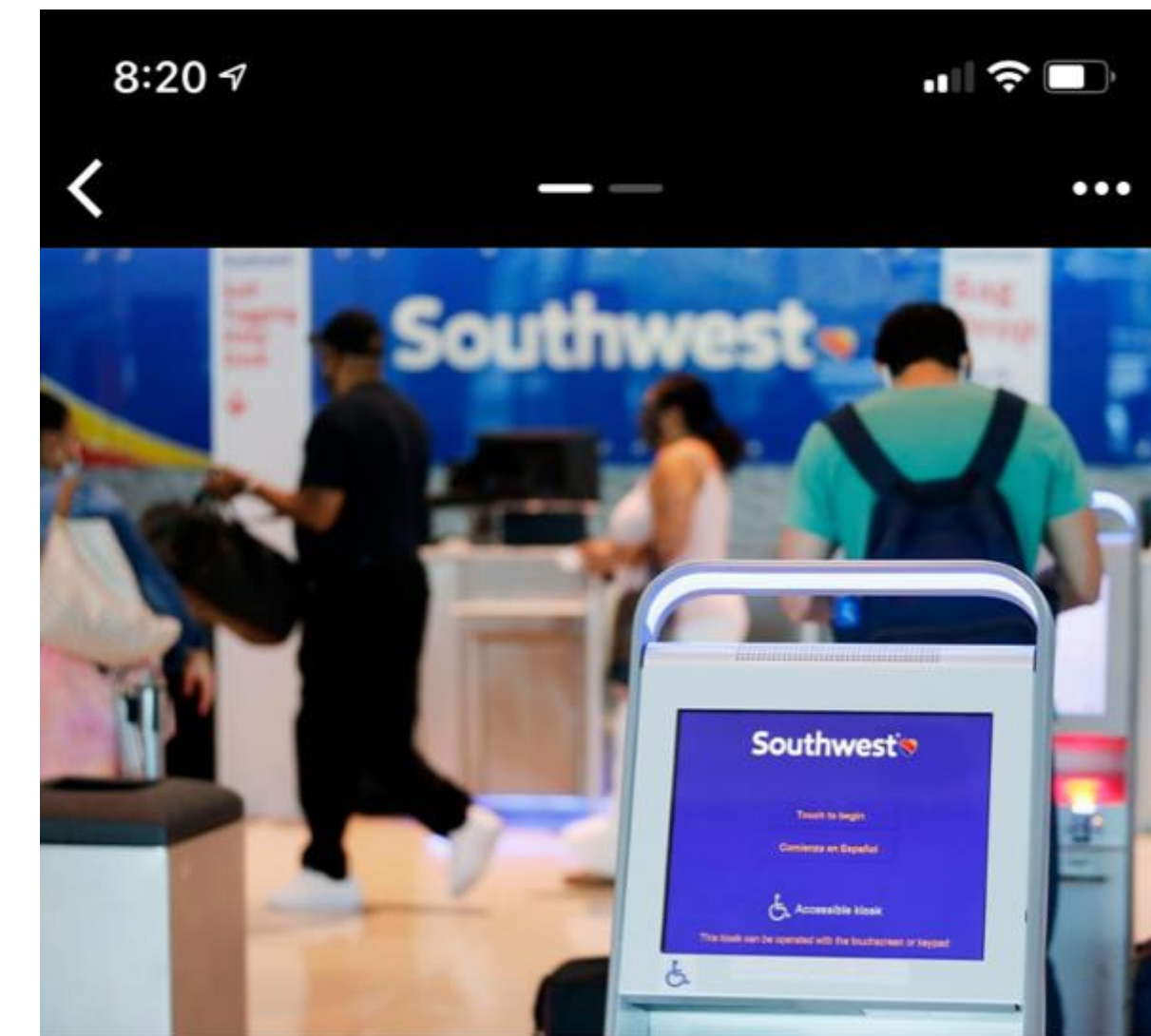
Opinion

MONEY

1M apply for unemployment as economy remains in limbo amid COVID-19 pandemic

Charisse Jones USA TODAY

Published 8:32 a.m. ET Aug. 27, 2020 | Updated 3:23 p.m. ET Aug. 27, 2020



The Dallas Morning News

Follow

Southwest Airlines needs 'business to double in order to break even,' CEO says

Passenger demand is still 'inconsistent' and at 'very depressed levels.'

BY KYLE ARNOLD
AUGUST 28, 2020 · 2 MIN READ

Southwest Airlines CEO Gary Kelly said despite some modest improvements in late July and August, "passenger demand remains inconsistent and difficult to forecast and still at very depressed levels."



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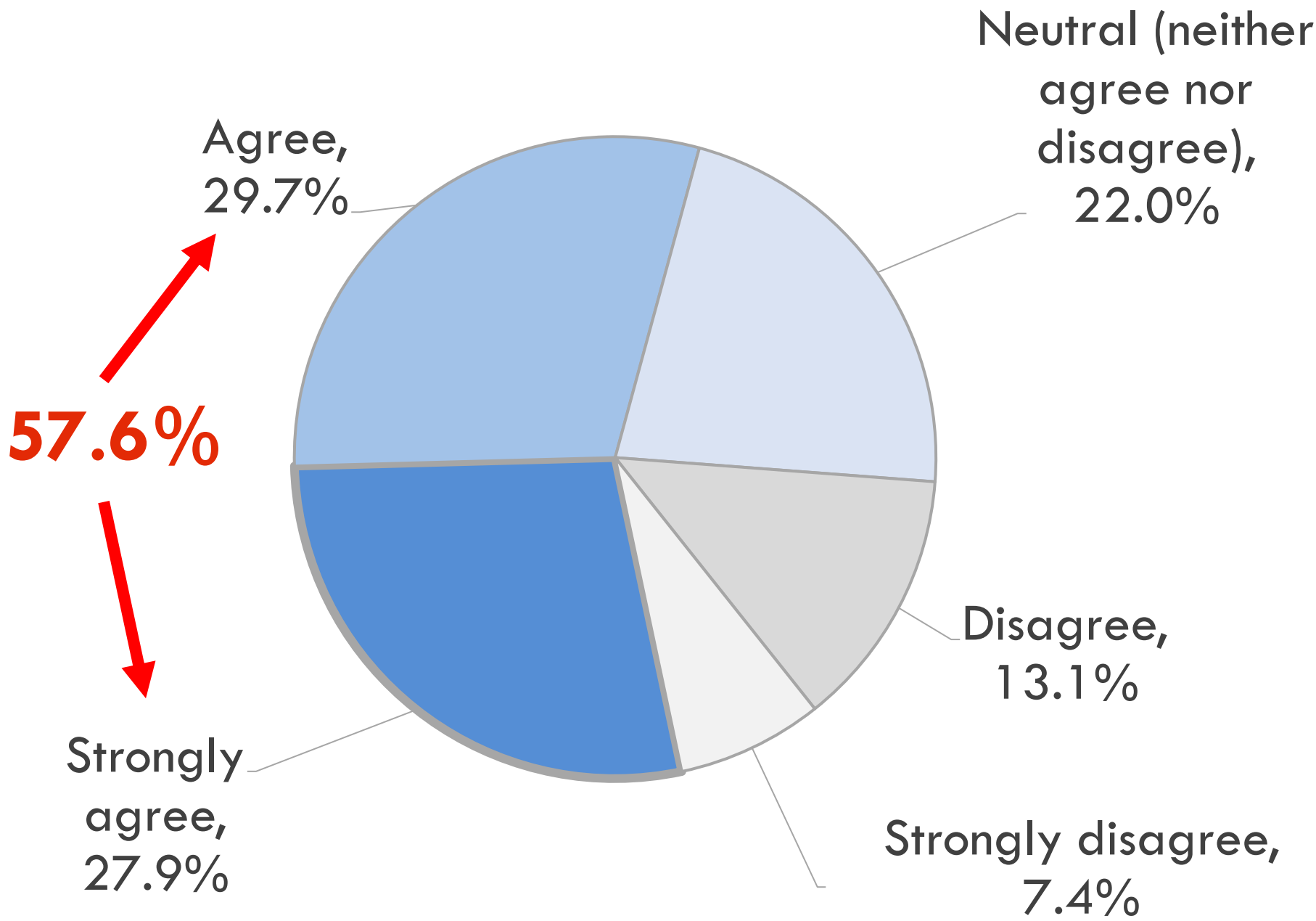
The American Mood



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

How much do you agree with the following statement?

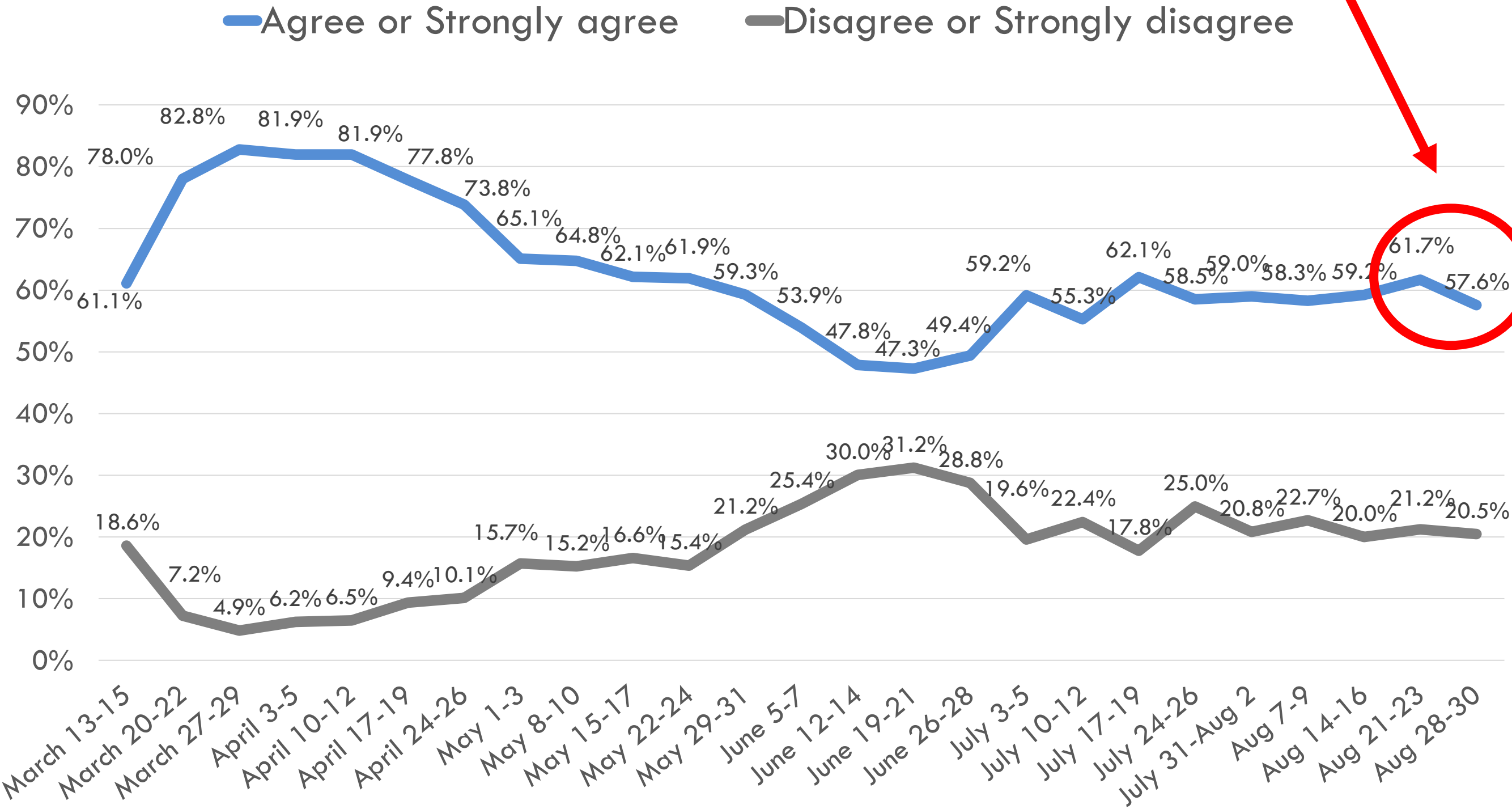
Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



(Base: Waves 1-25. 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 and 1,250 completed surveys.)

A positive change we'll see a lot if this week

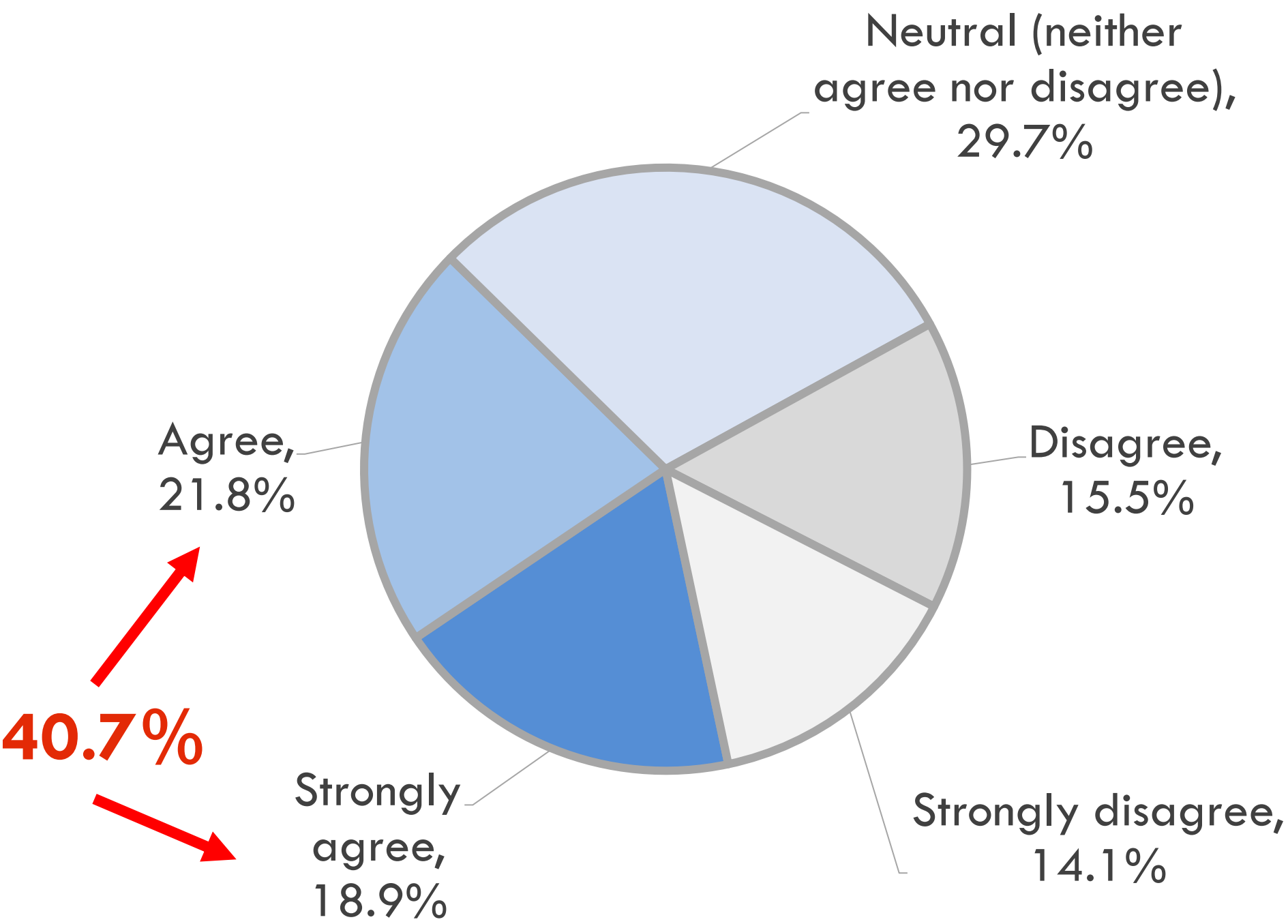
Historical data



WON'T TRAVEL WITHOUT VACCINE

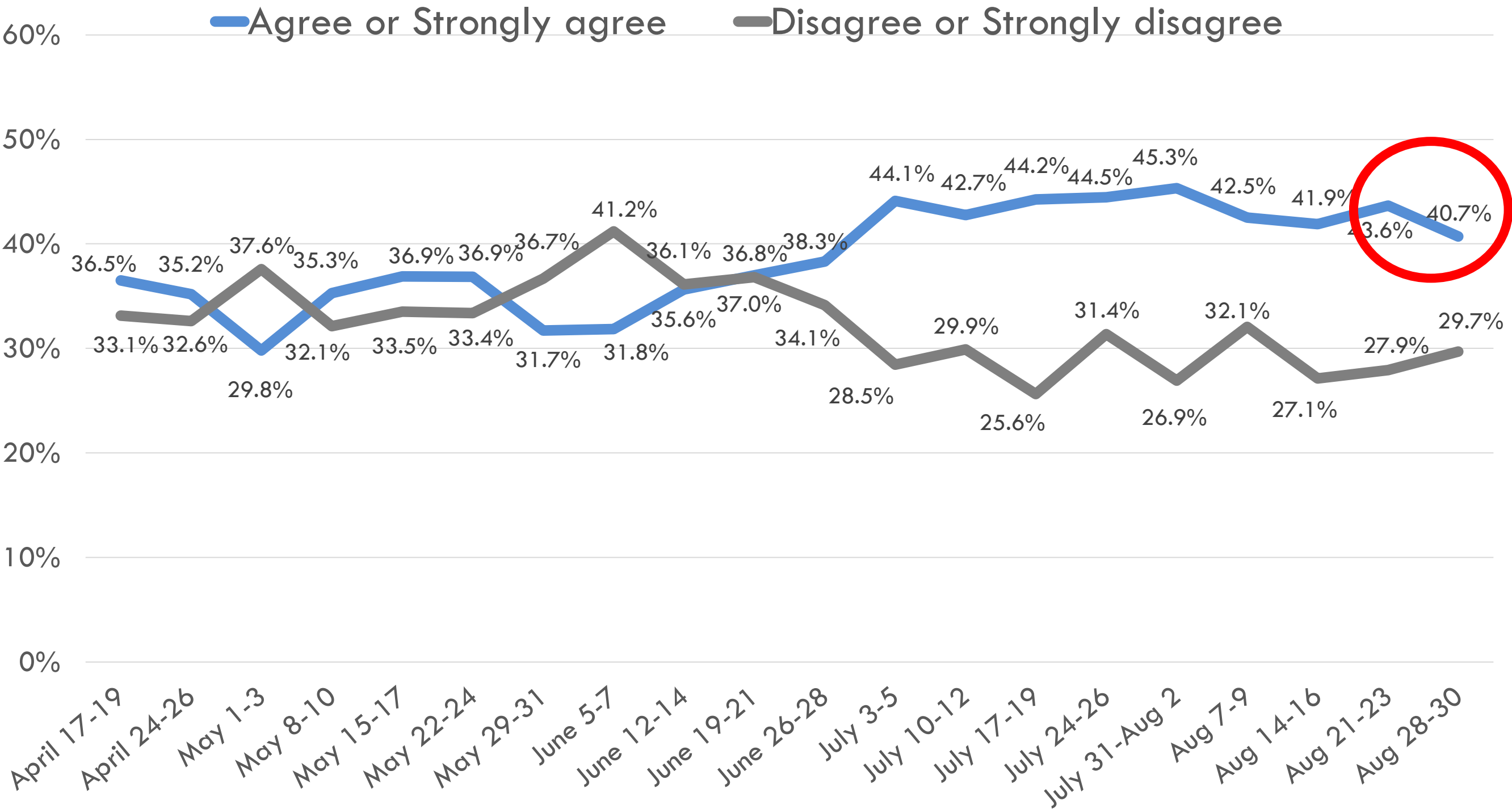
How much do you agree with the following statement?

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



(Base: Waves 6-25. 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 and 1,250 completed surveys.)

Historical data

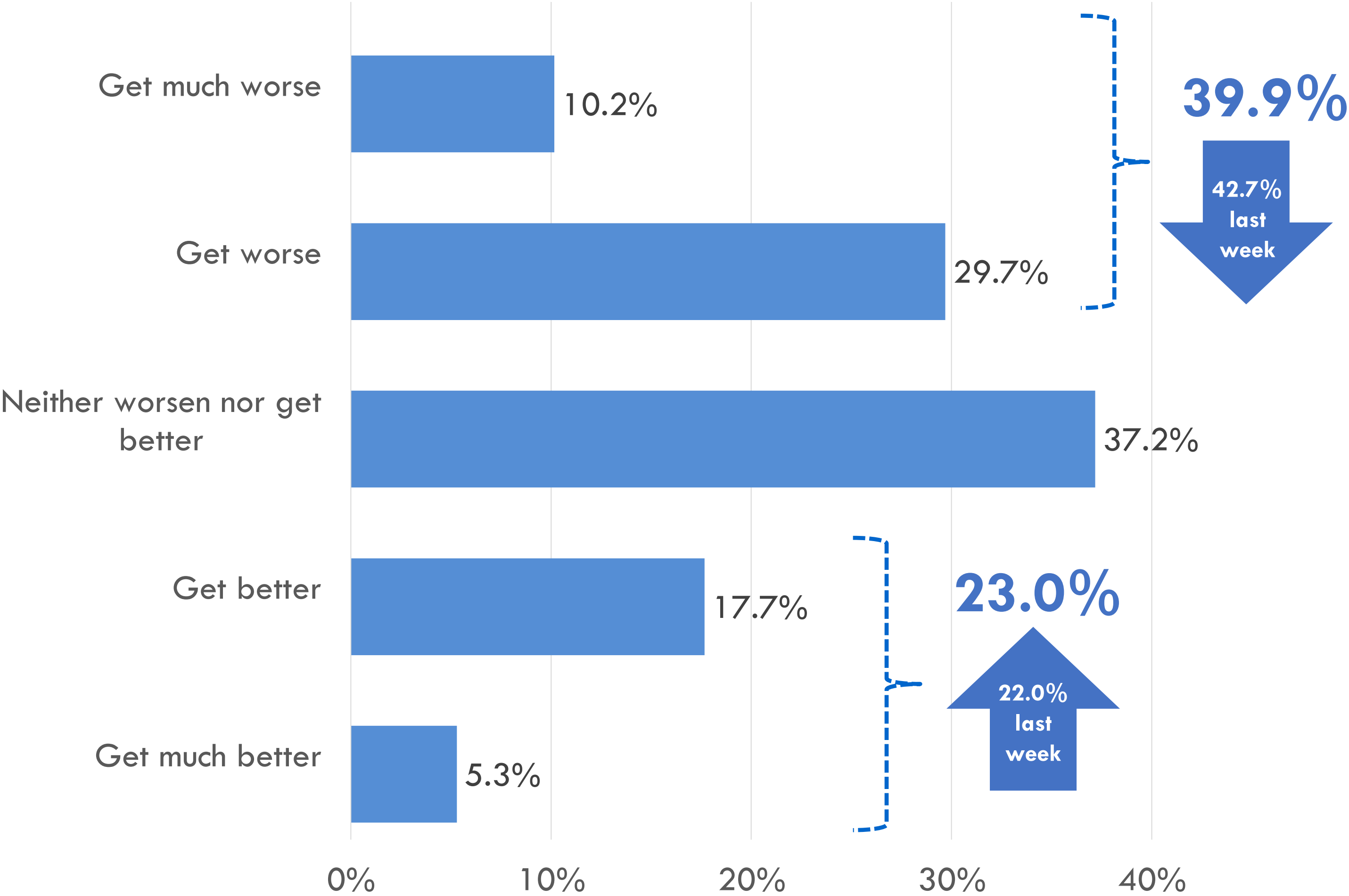


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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

In the next month the coronavirus situation will _____

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

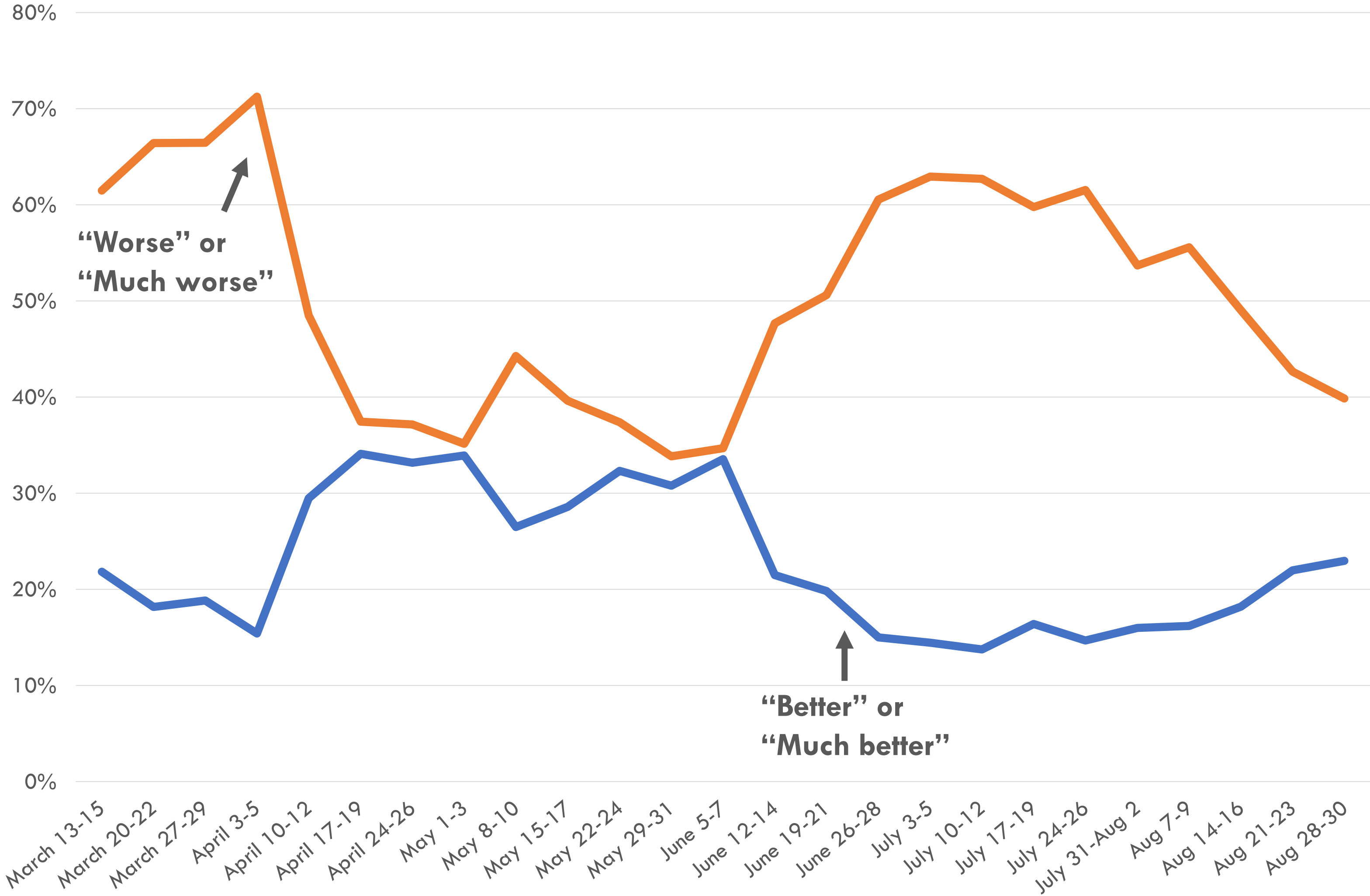


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-25)

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 _____

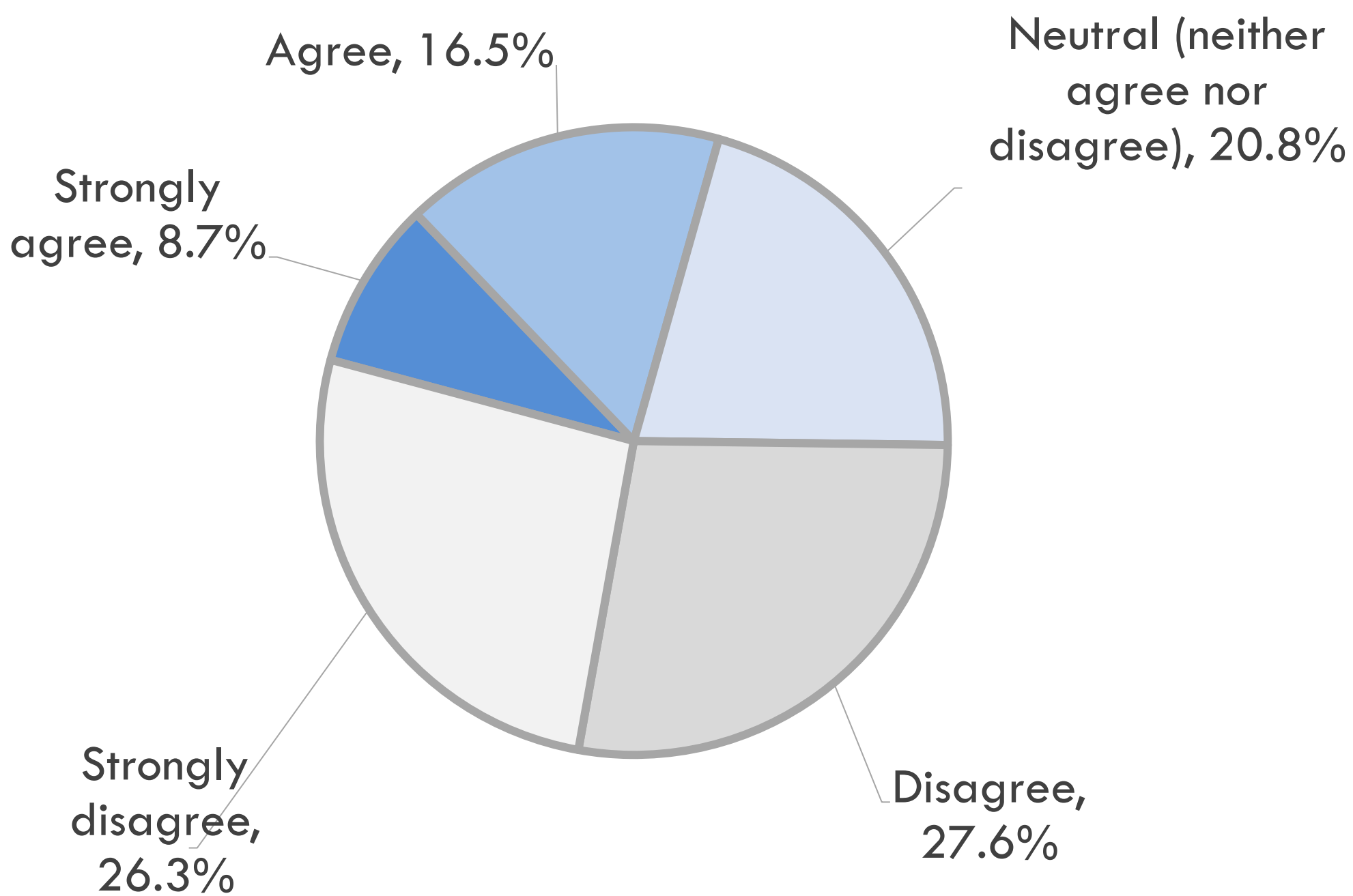
(Base: Waves 1-25. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207 and 1,250 completed surveys.



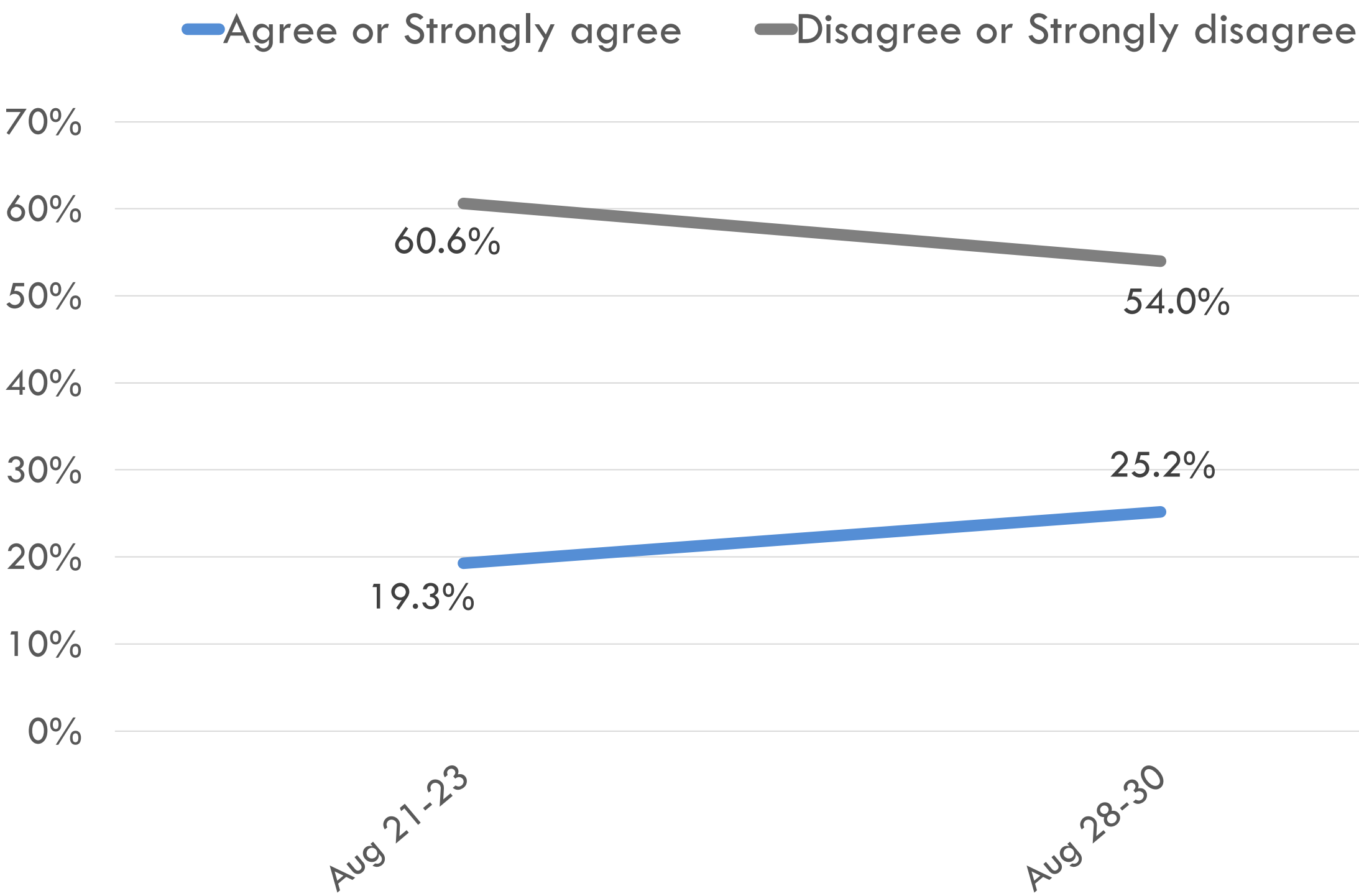
RESOLUTION OF THE PANDEMIC BY THE END OF 2020

How much do you agree with the following statement?

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



Historical data

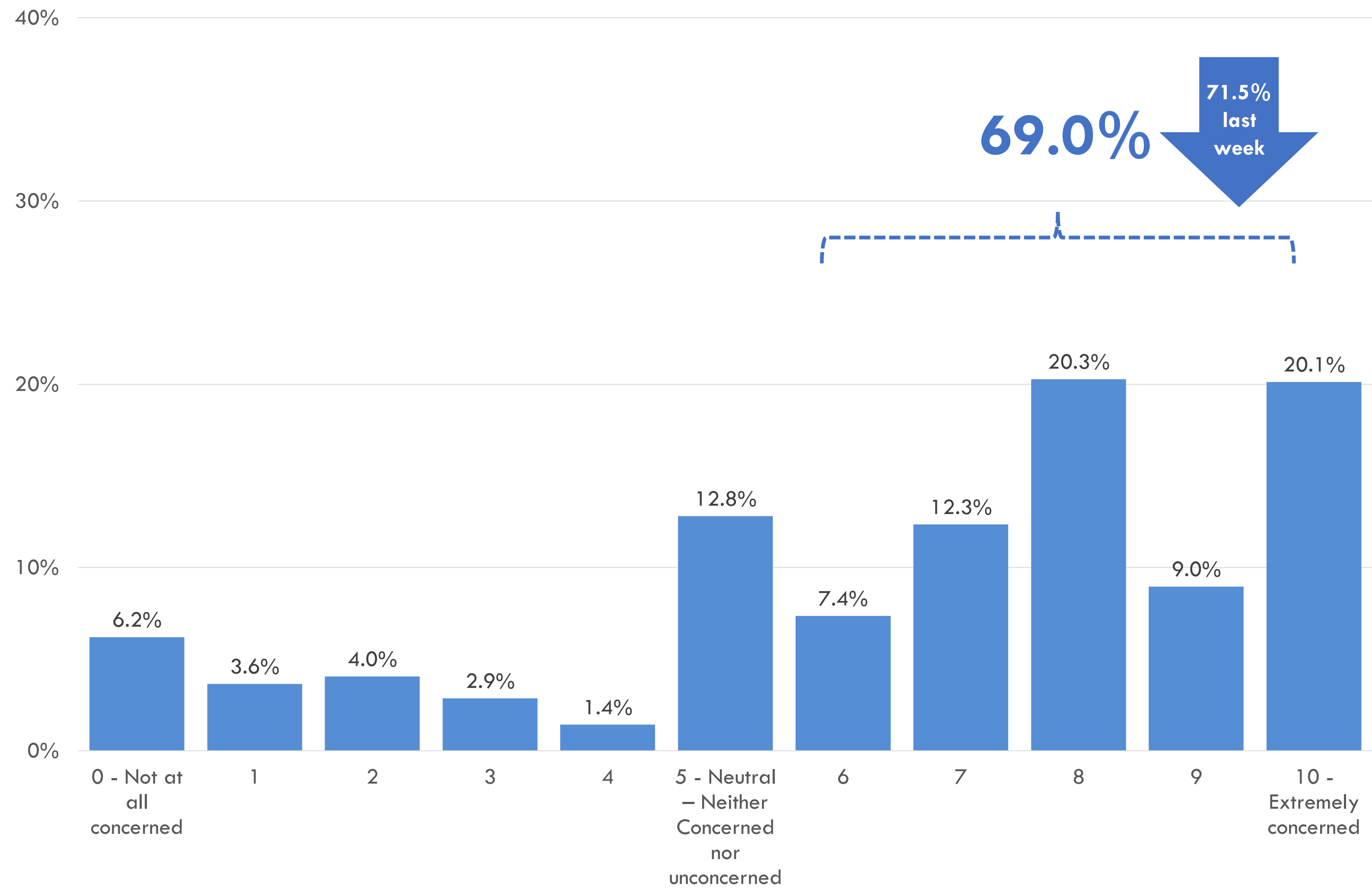


(Base: Wave 24-25 data. All respondents, 1,207 and 1,250 completed surveys.)

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)

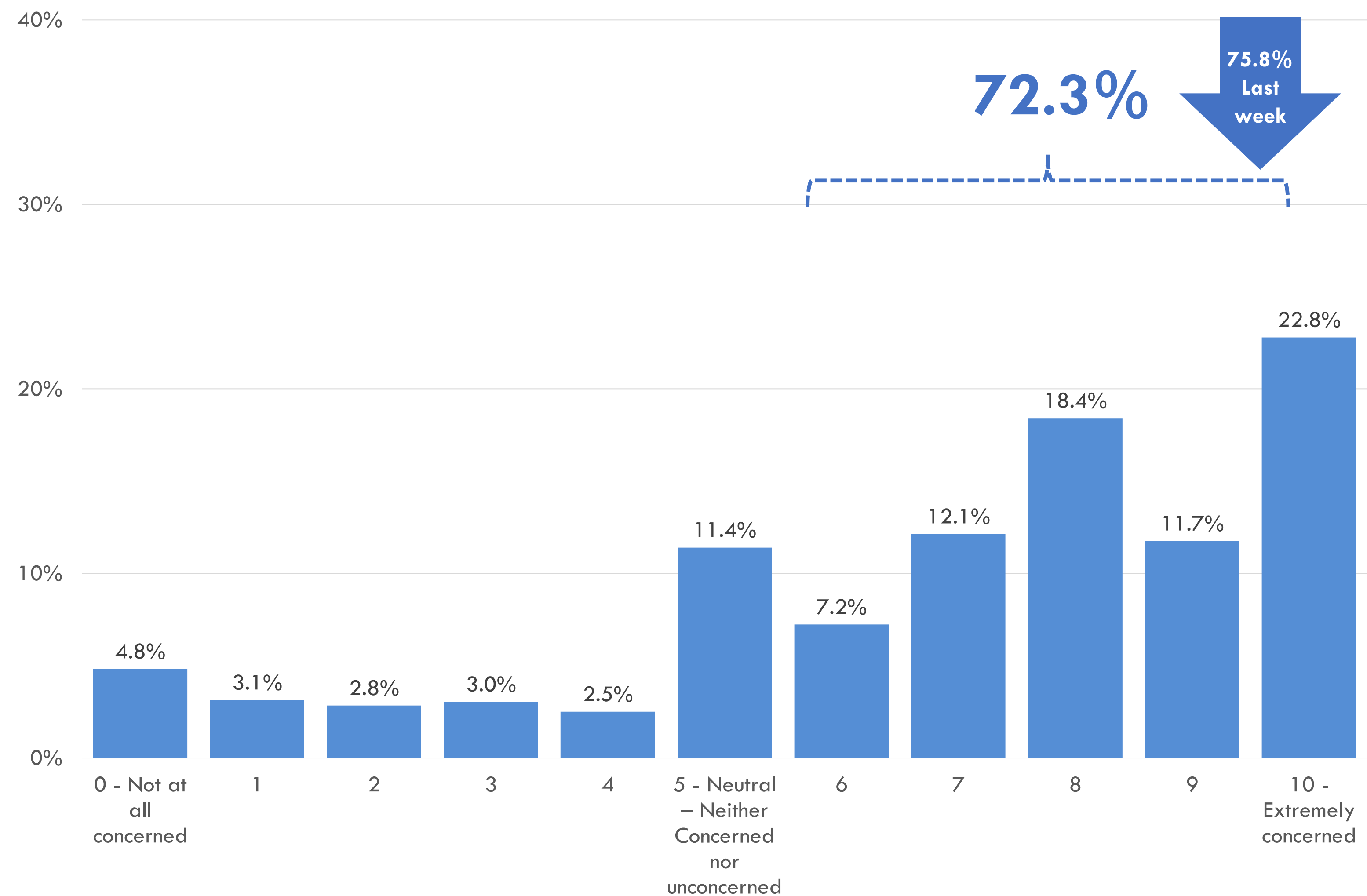
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



HEALTH CONCERNS (FAMILY & FRIENDS)

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

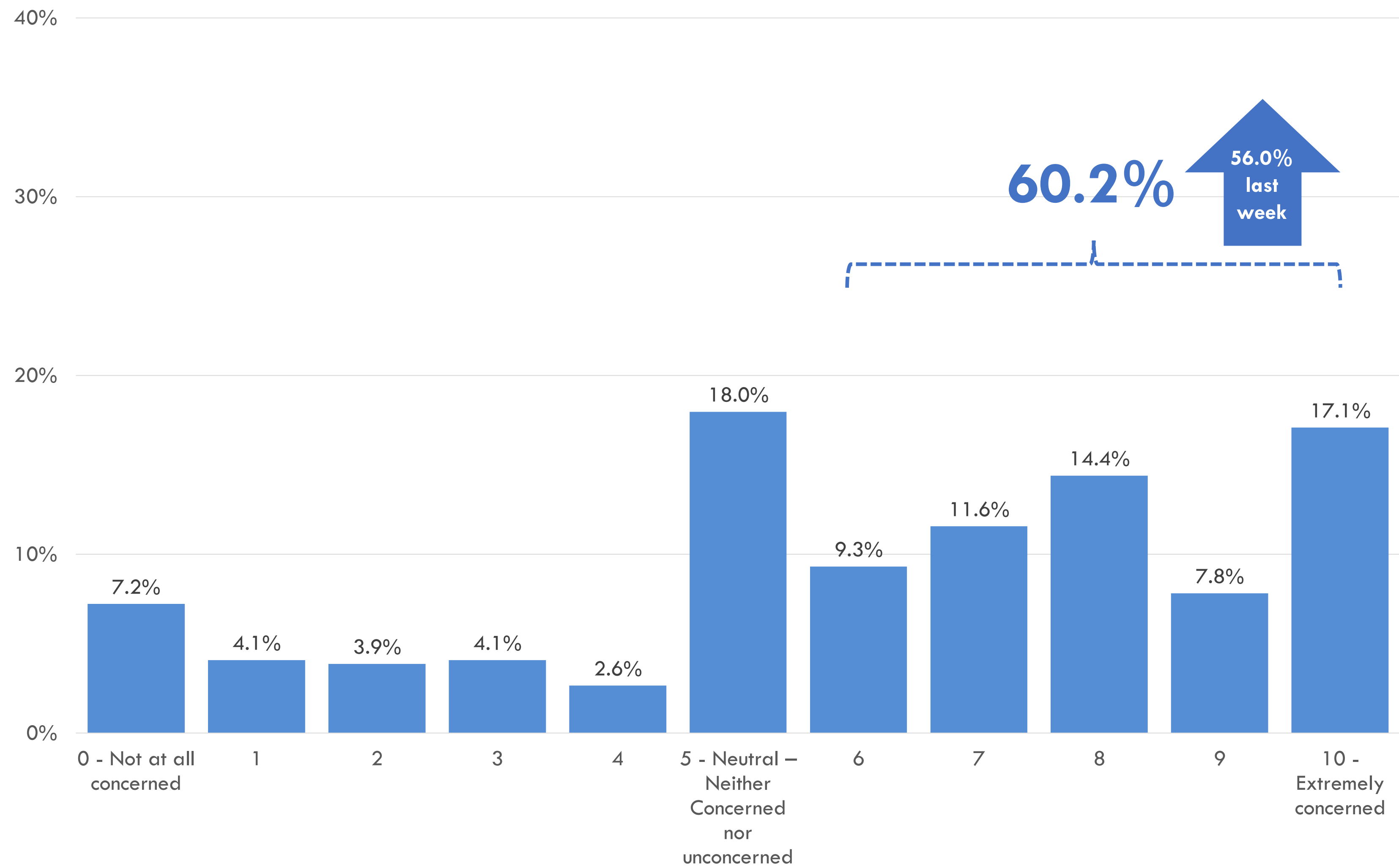
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



CONCERNS ABOUT PERSONAL FINANCES

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

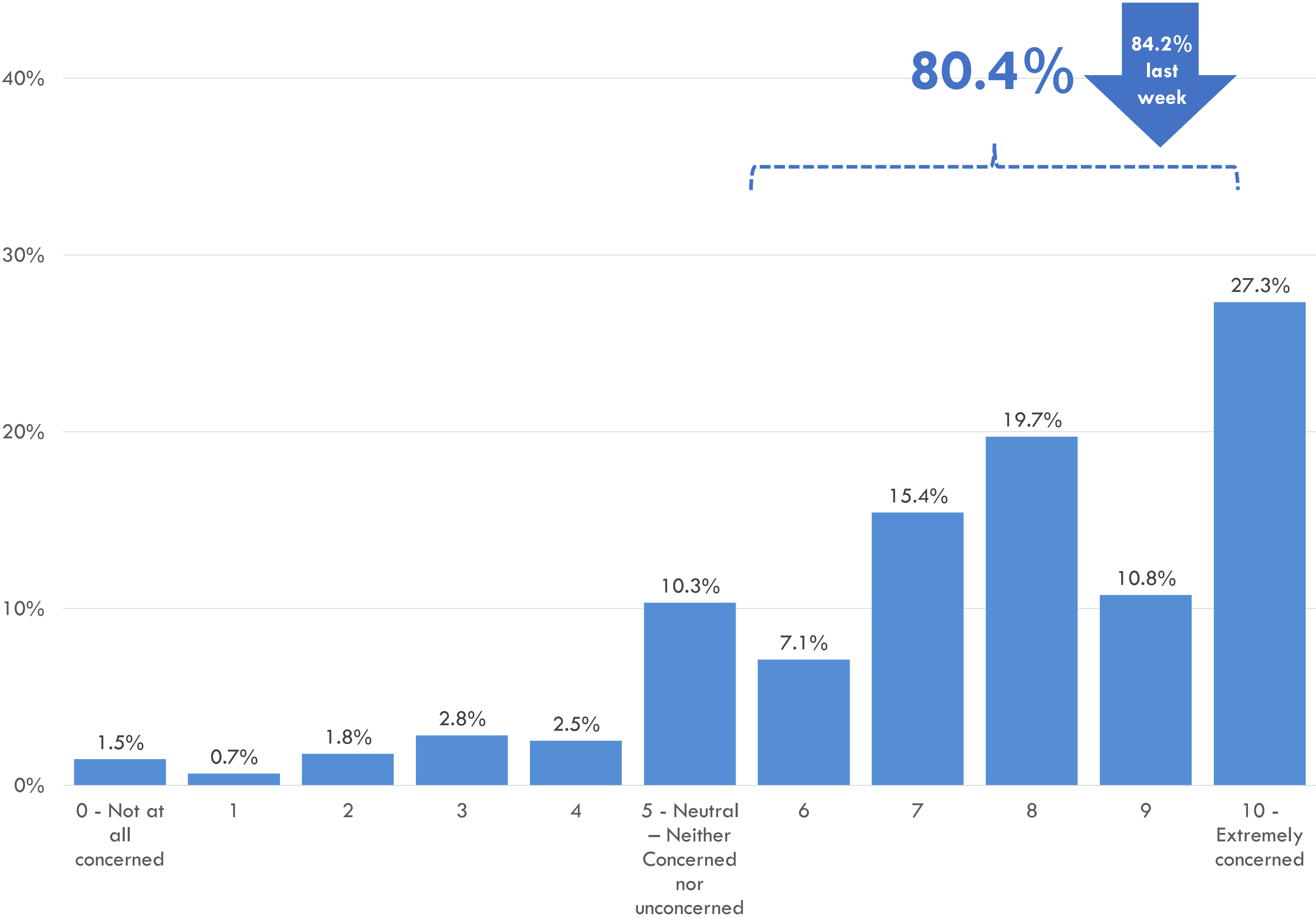
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



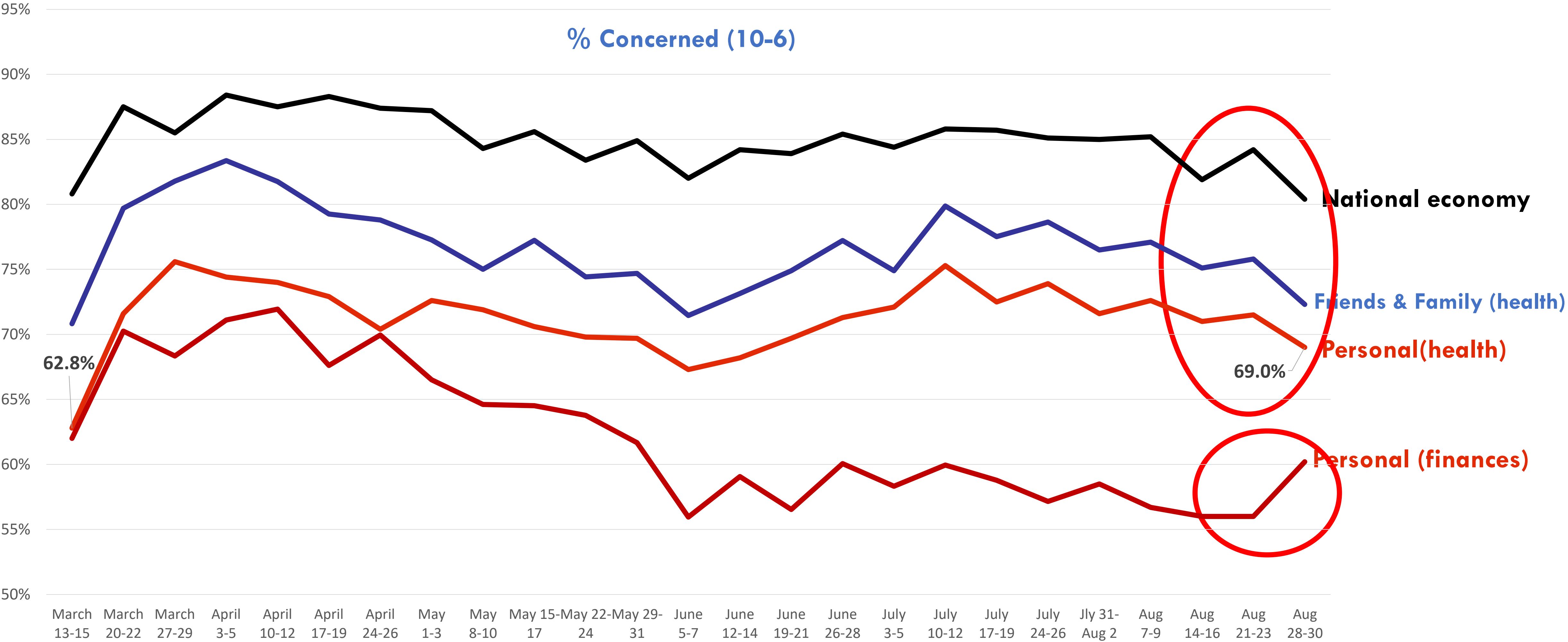
CONCERNS ABOUT NATIONAL ECONOMY

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

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



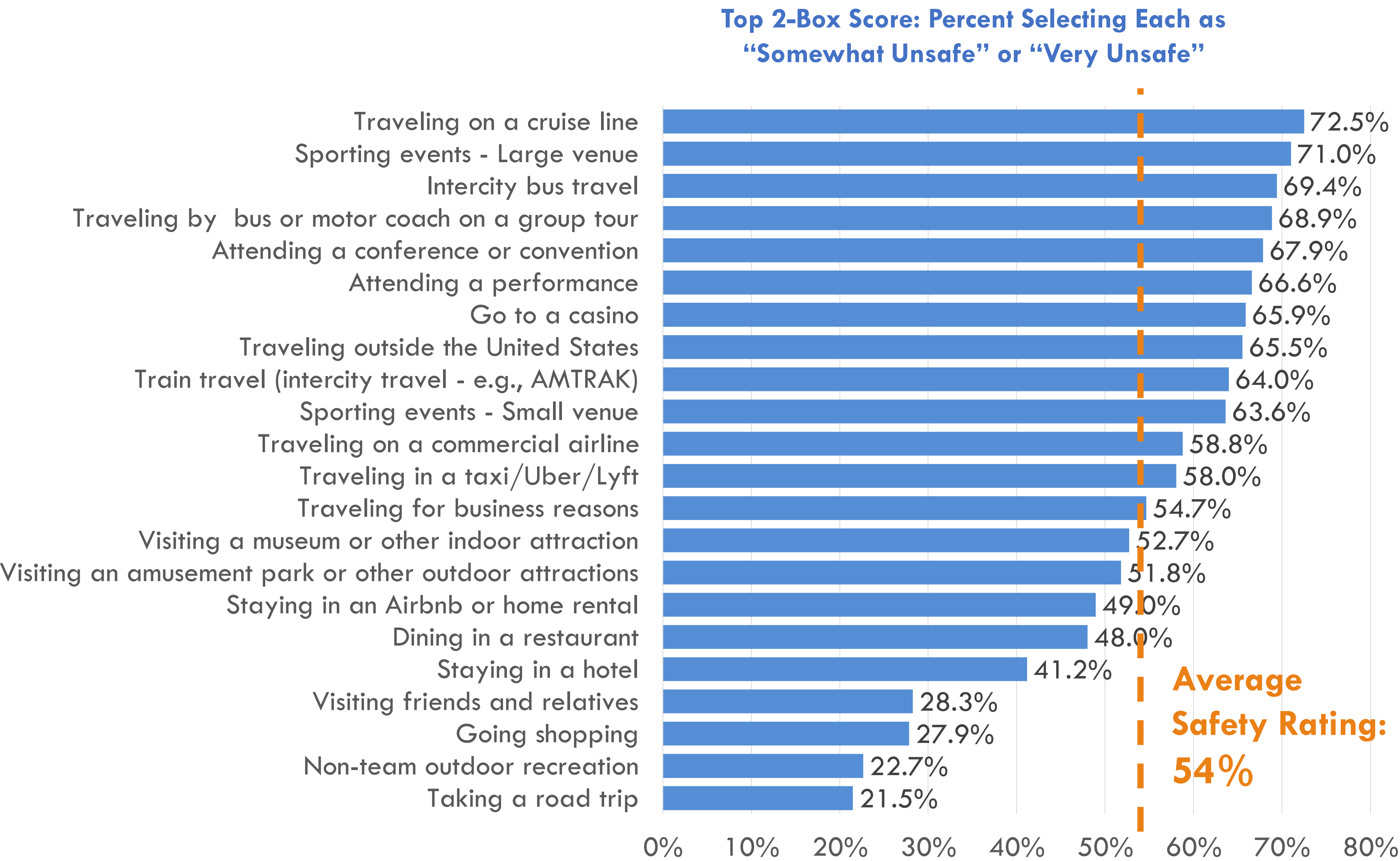
NATIONAL ANXIETY MAP



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 25)

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

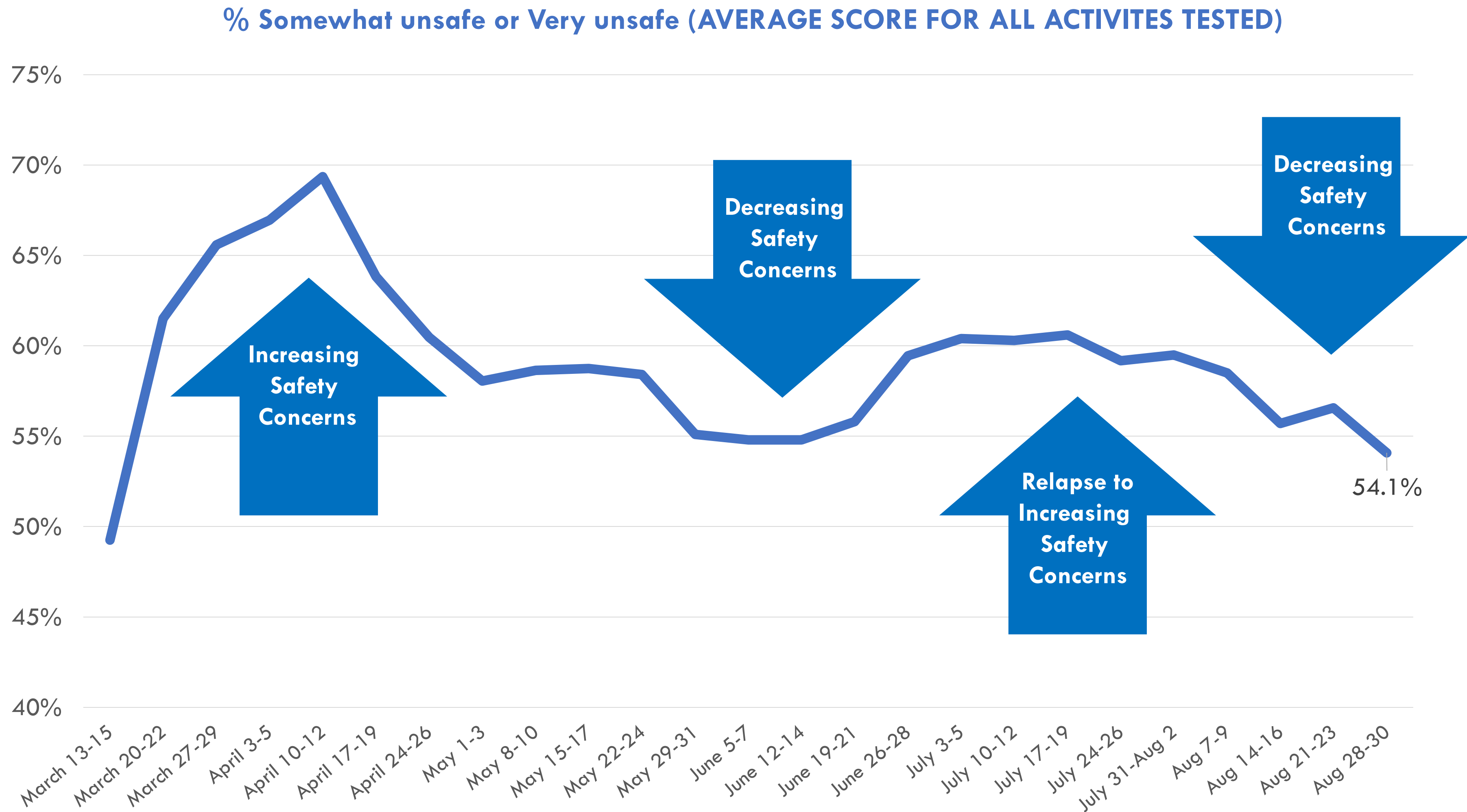
(Base: Wave 25 data. All respondents, 1,250 completed surveys.
Data collected Aug 28-30, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-25 COMPARISON)

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

(Base: Waves 1-25. 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 and 1,250 completed surveys.



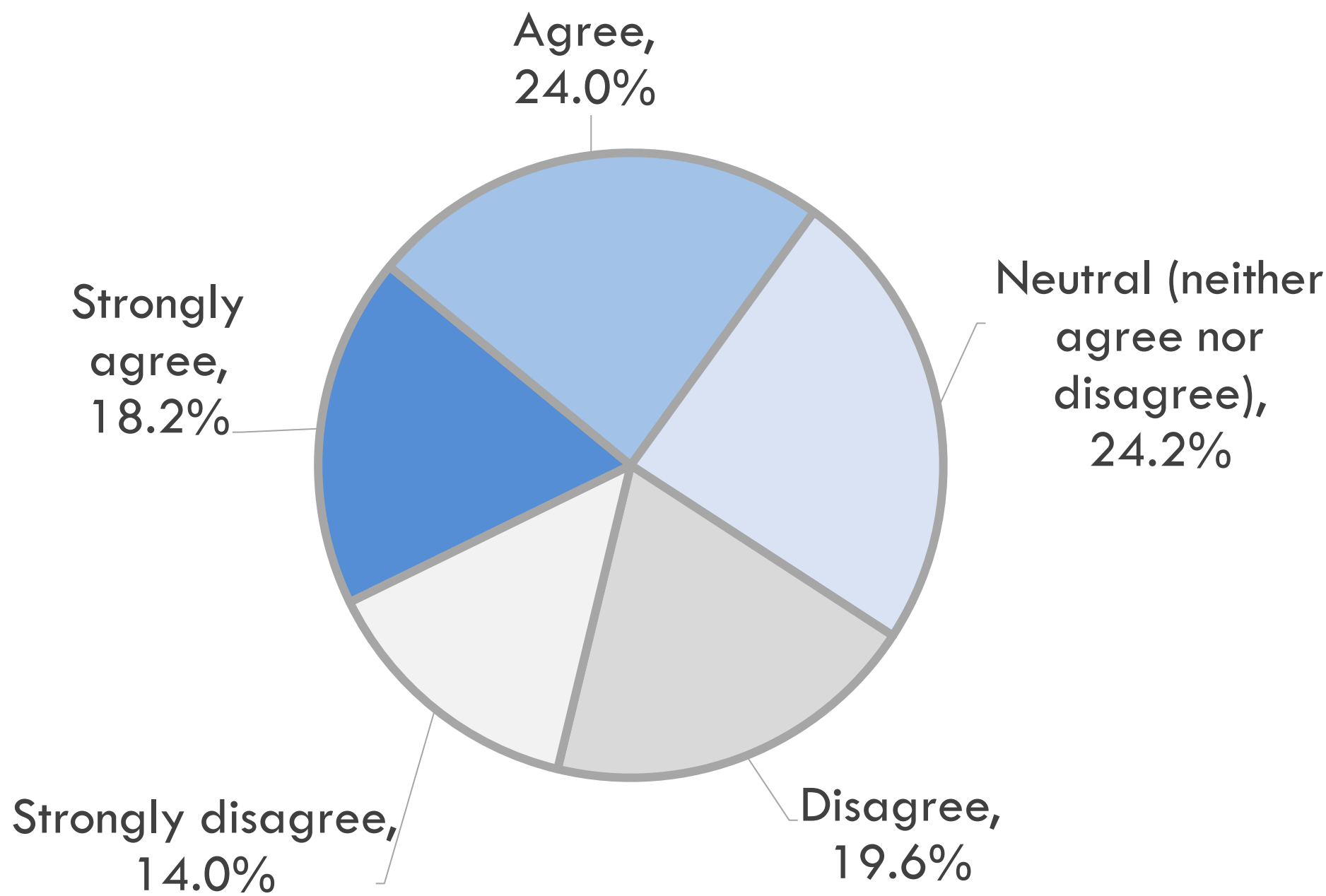
The Impact on Travel



COMFORT ENJOYING HOME COMMUNITY

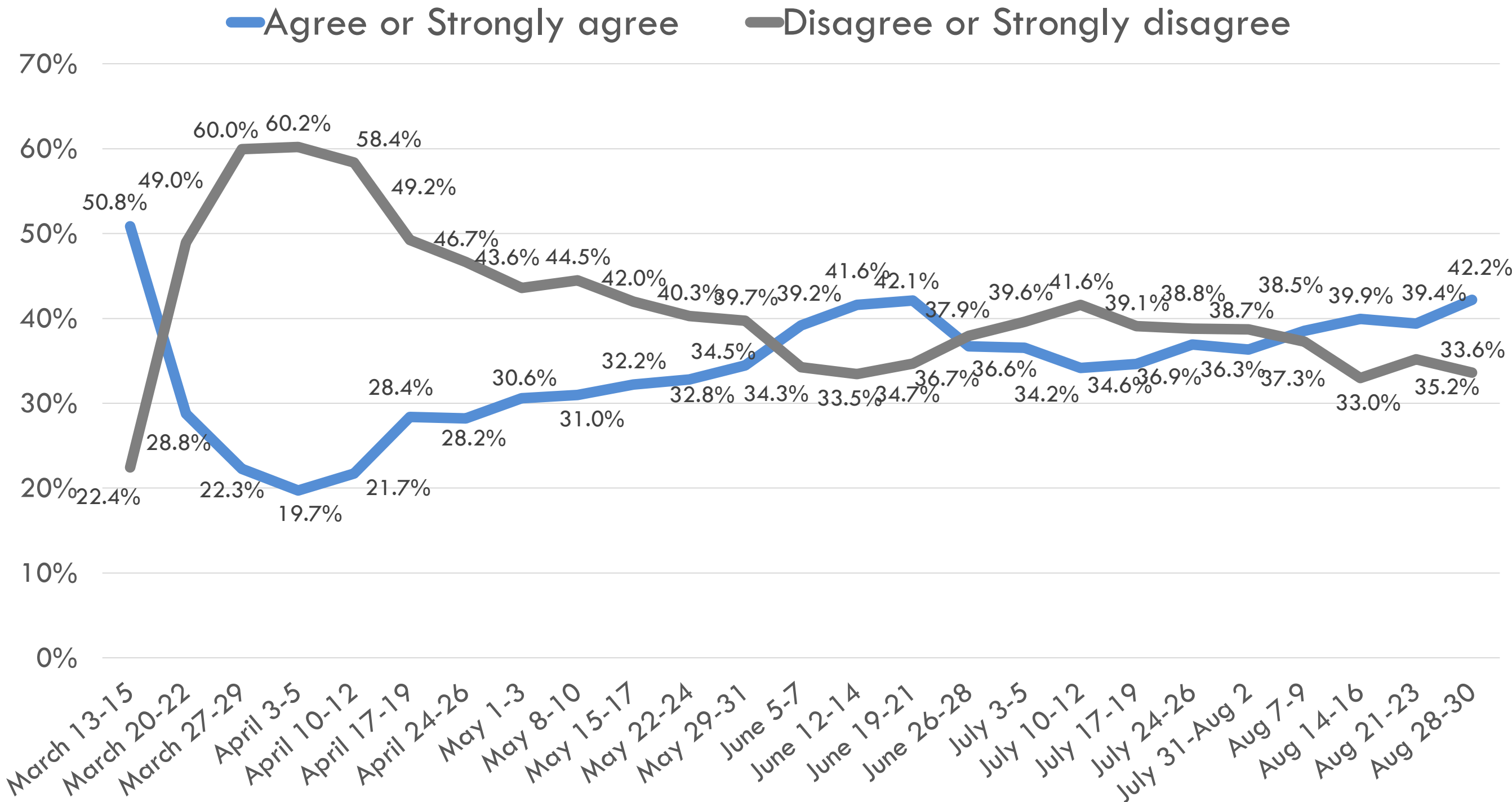
How much do you agree with the following statement?

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



(Base: Waves 1-25. 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 and 1,250 completed surveys.

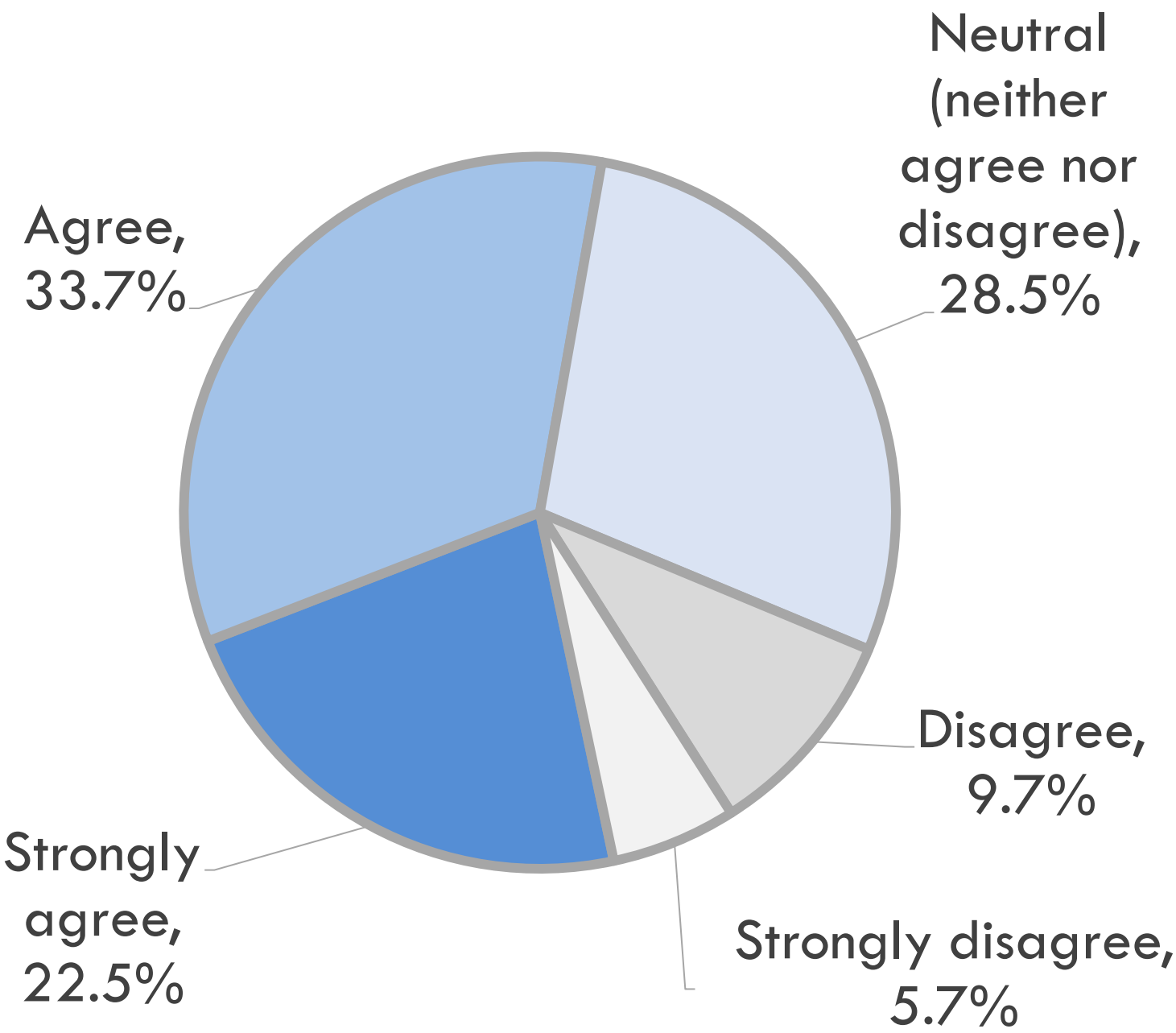
Historical data



TRAVELERS IN COMMUNITY ARE UNWANTED

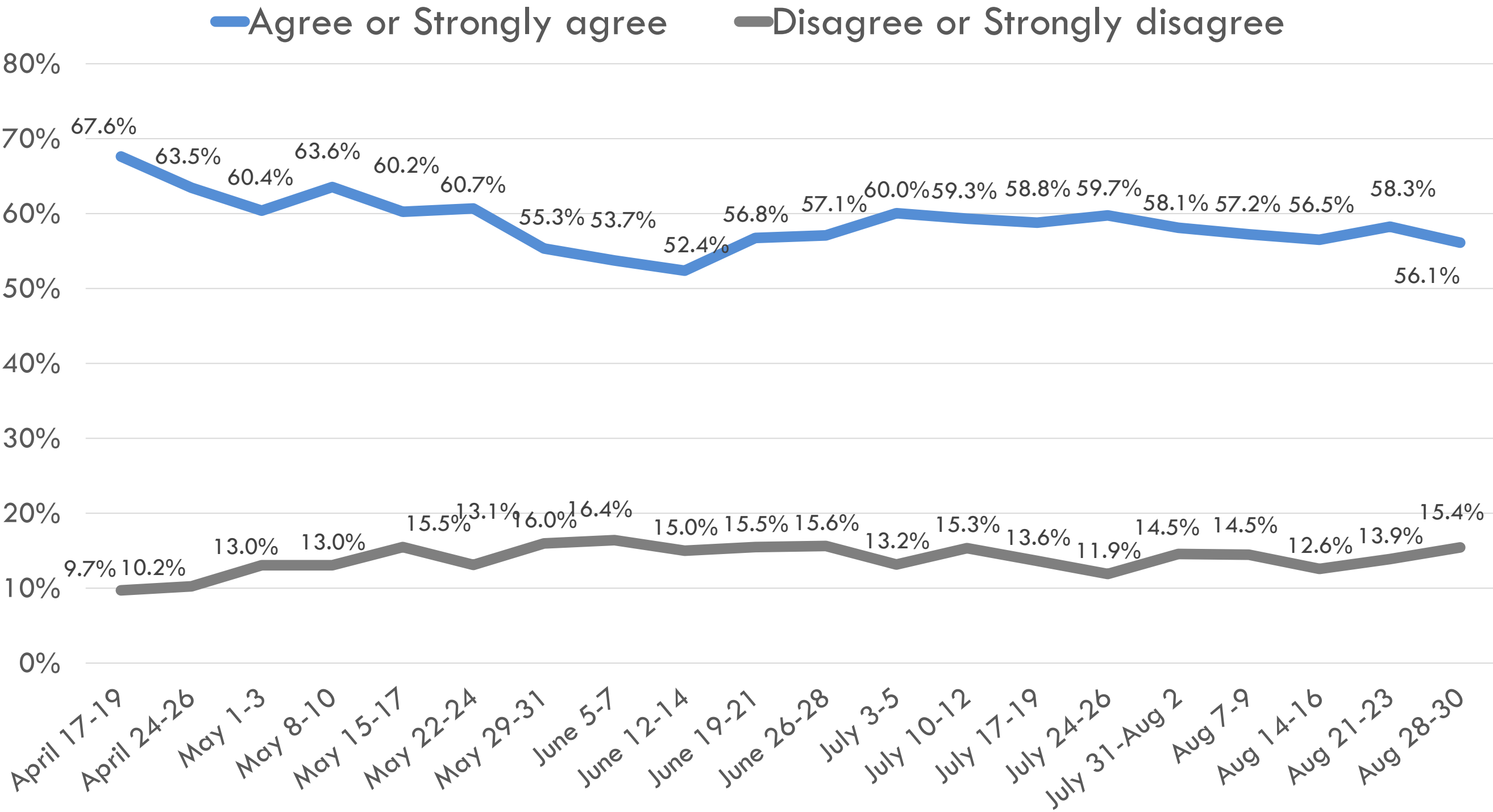
How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



(Base: Waves 6-25. 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 and 1,250 completed surveys.

Historical data

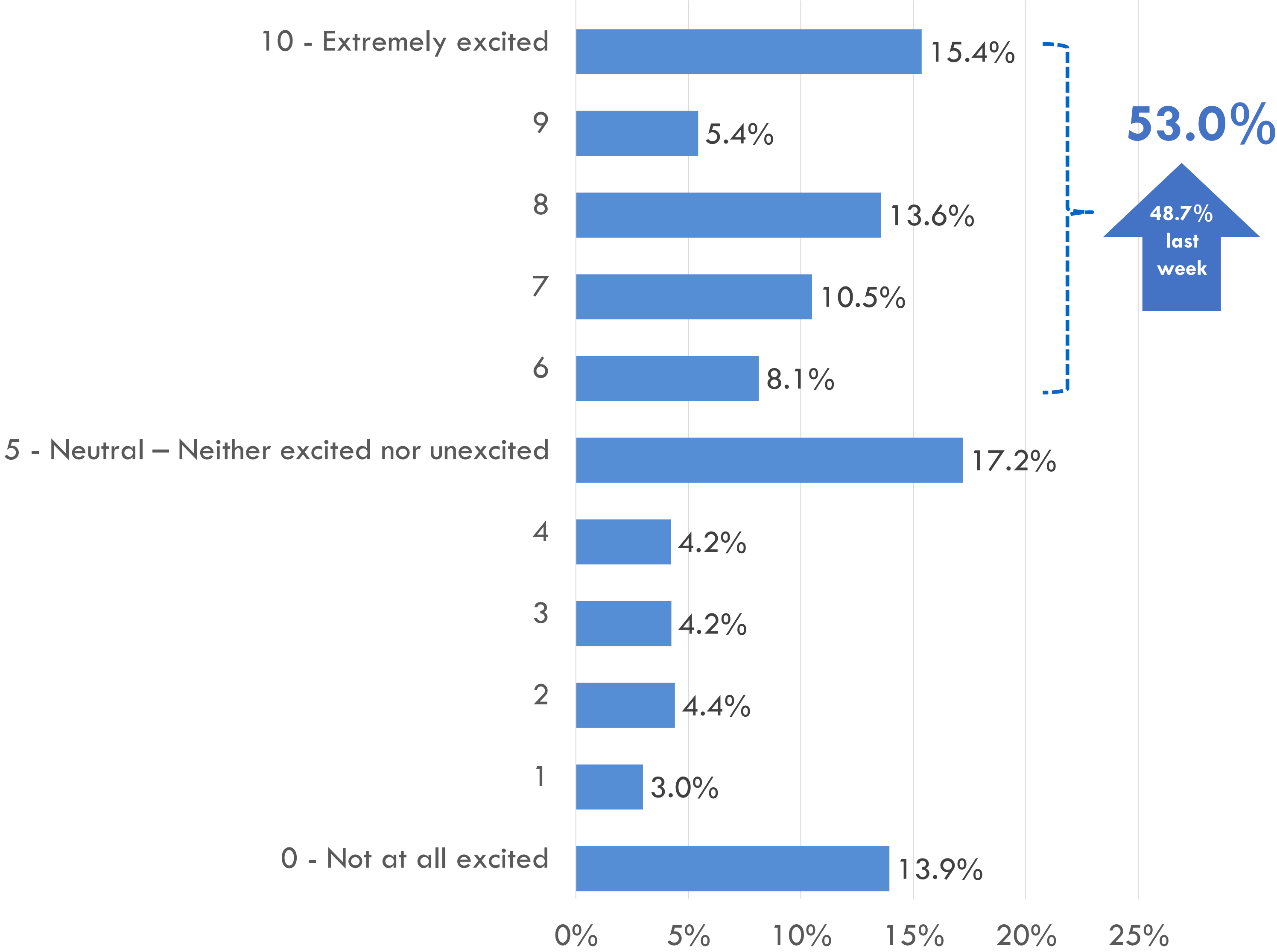


EXCITEMENT TO TRAVEL NOW

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)

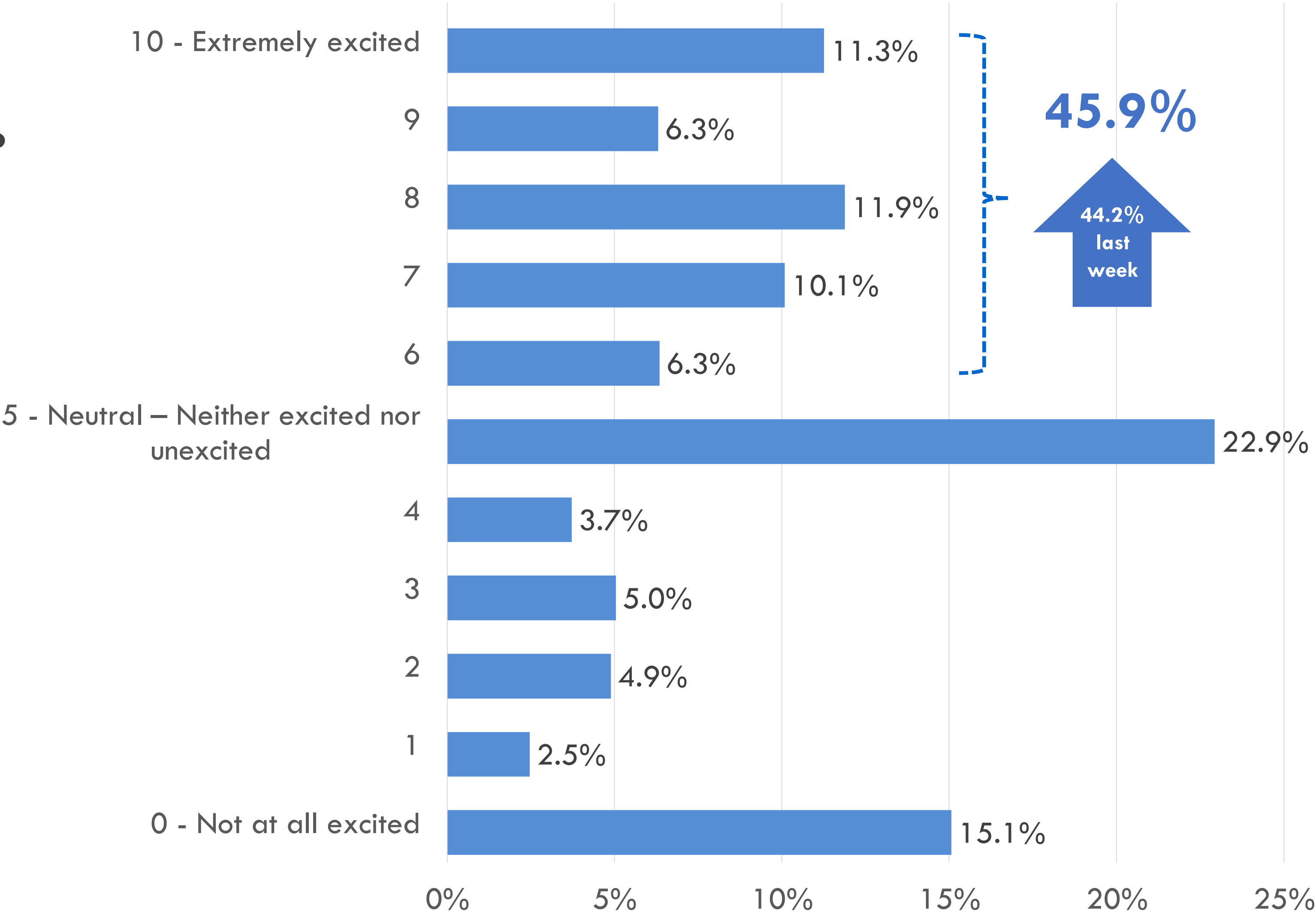
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



OPENNESS TO TRAVEL INFORMATION

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

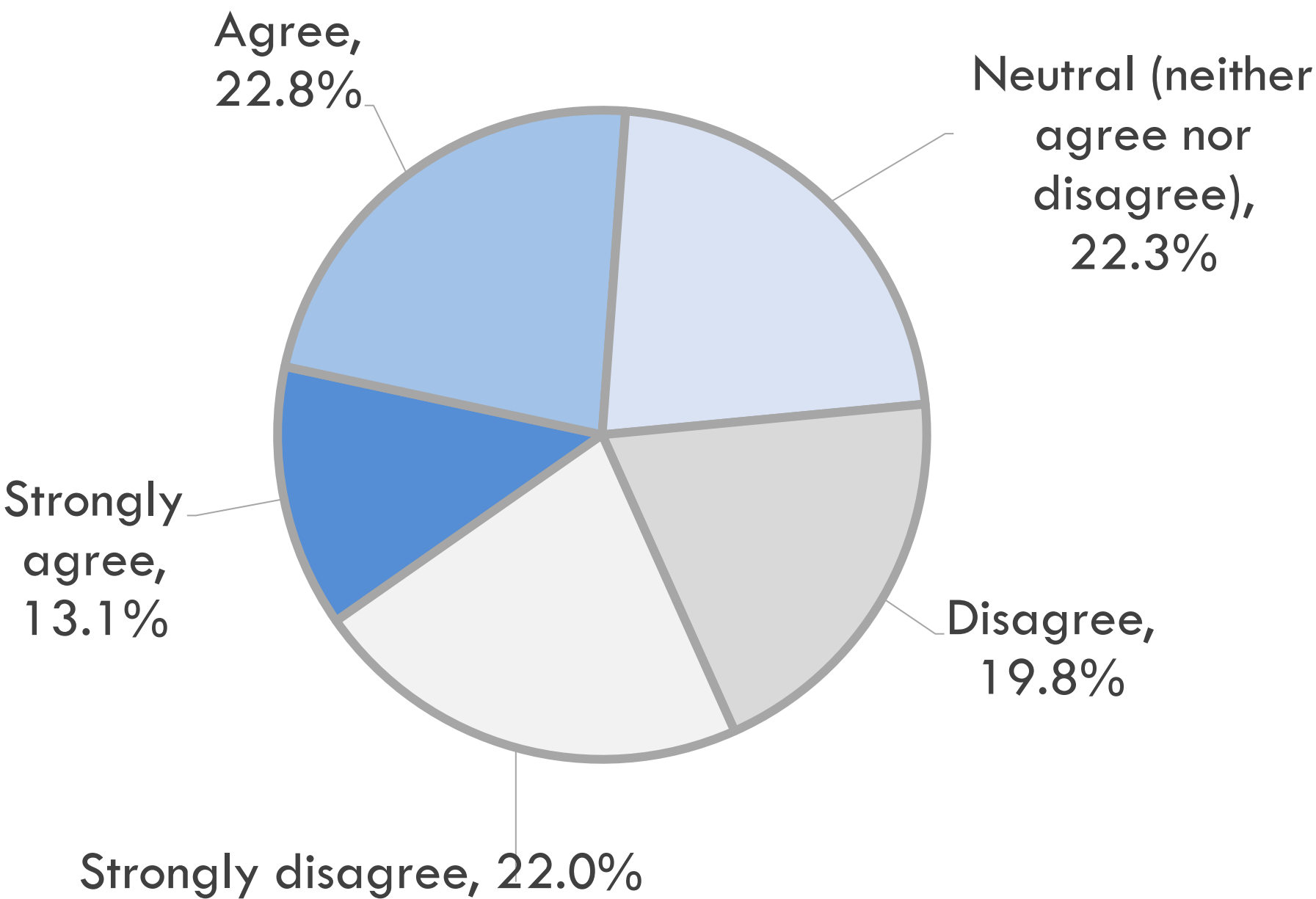
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



EXPECTATIONS FOR TRAVELING IN THE FALL

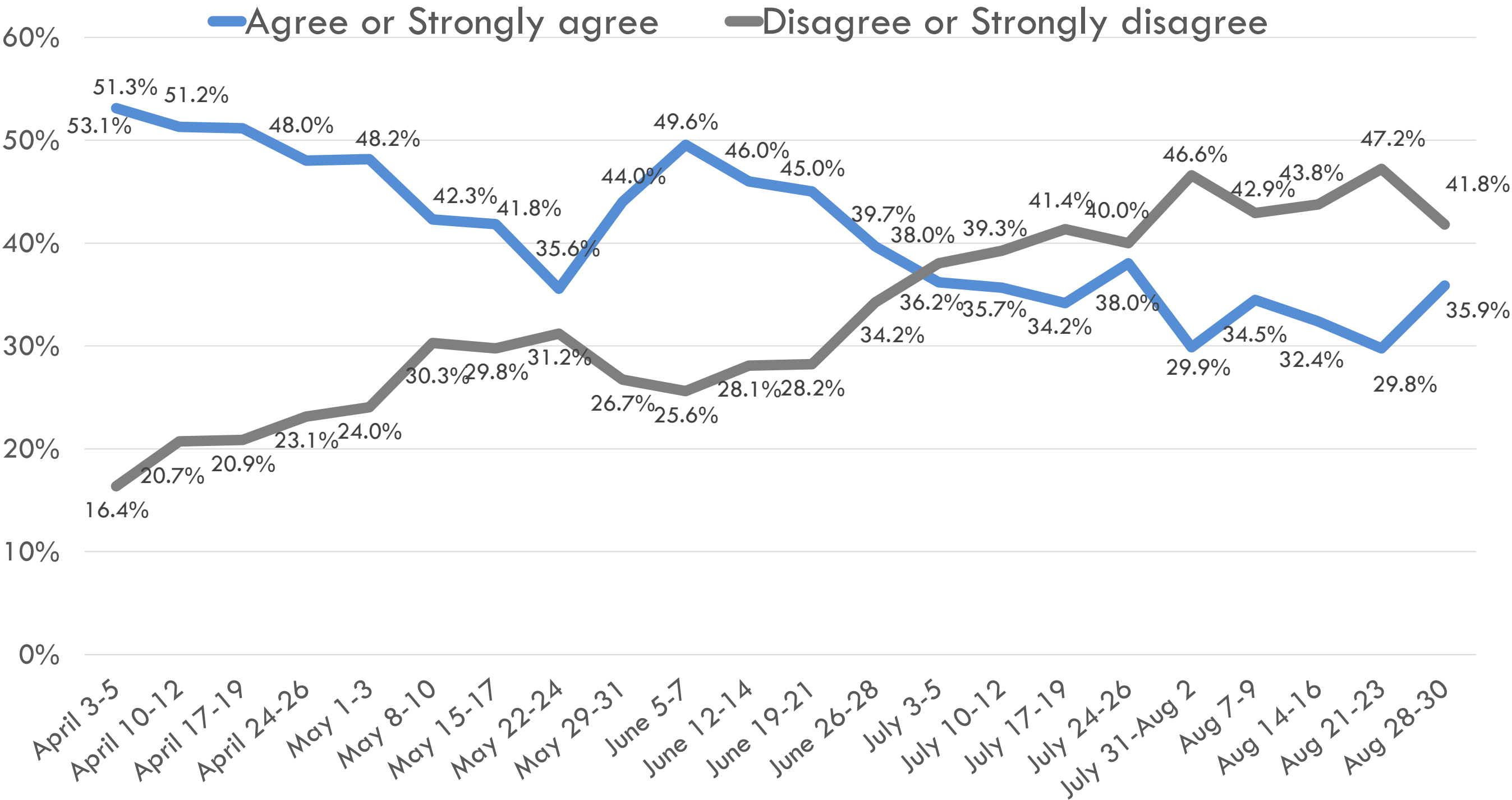
How much do you agree with the following statement?

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



(Base: Waves 4-25. All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207 and 1,250 completed surveys.

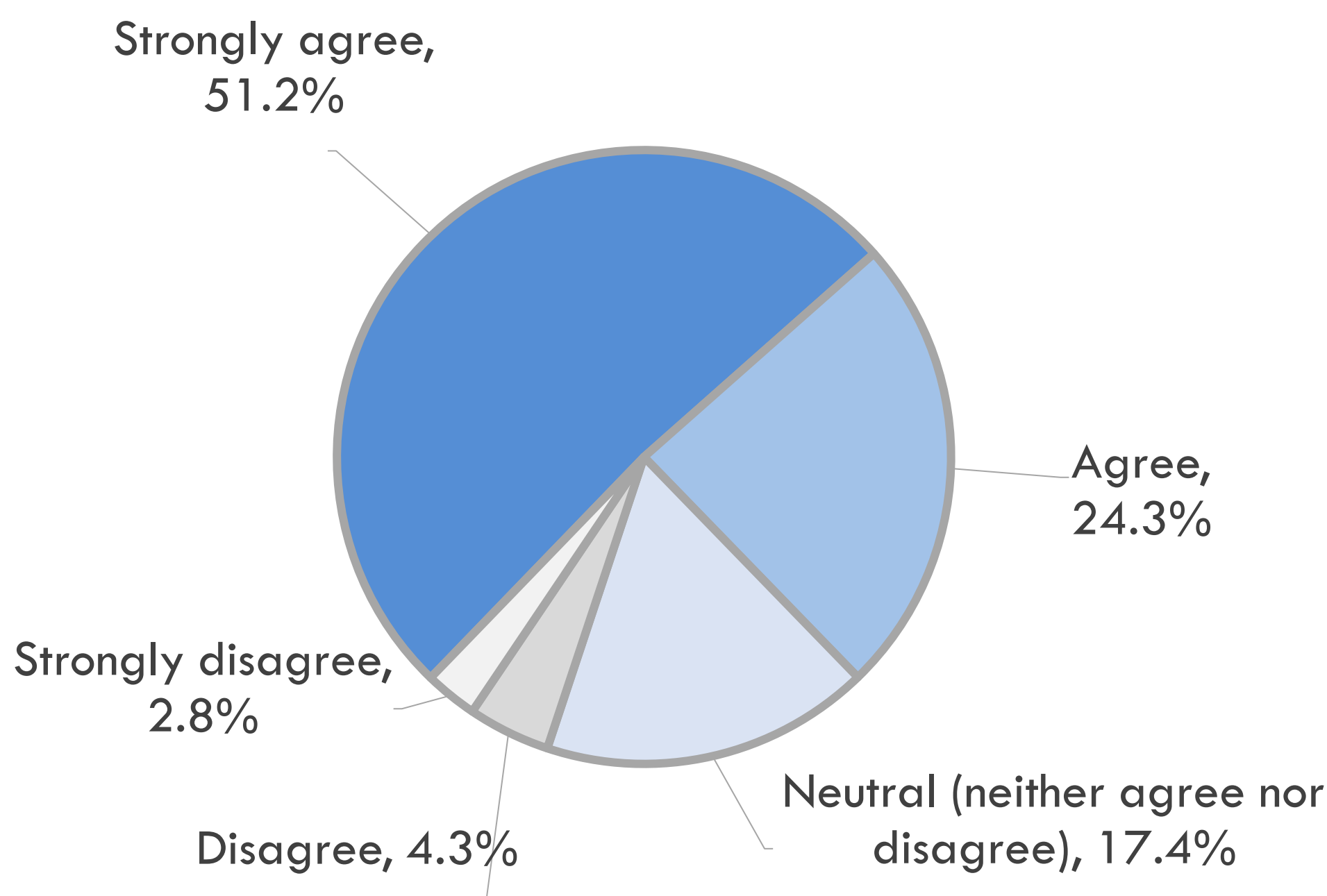
Historical data



AVOIDING INTERNATIONAL TRAVEL

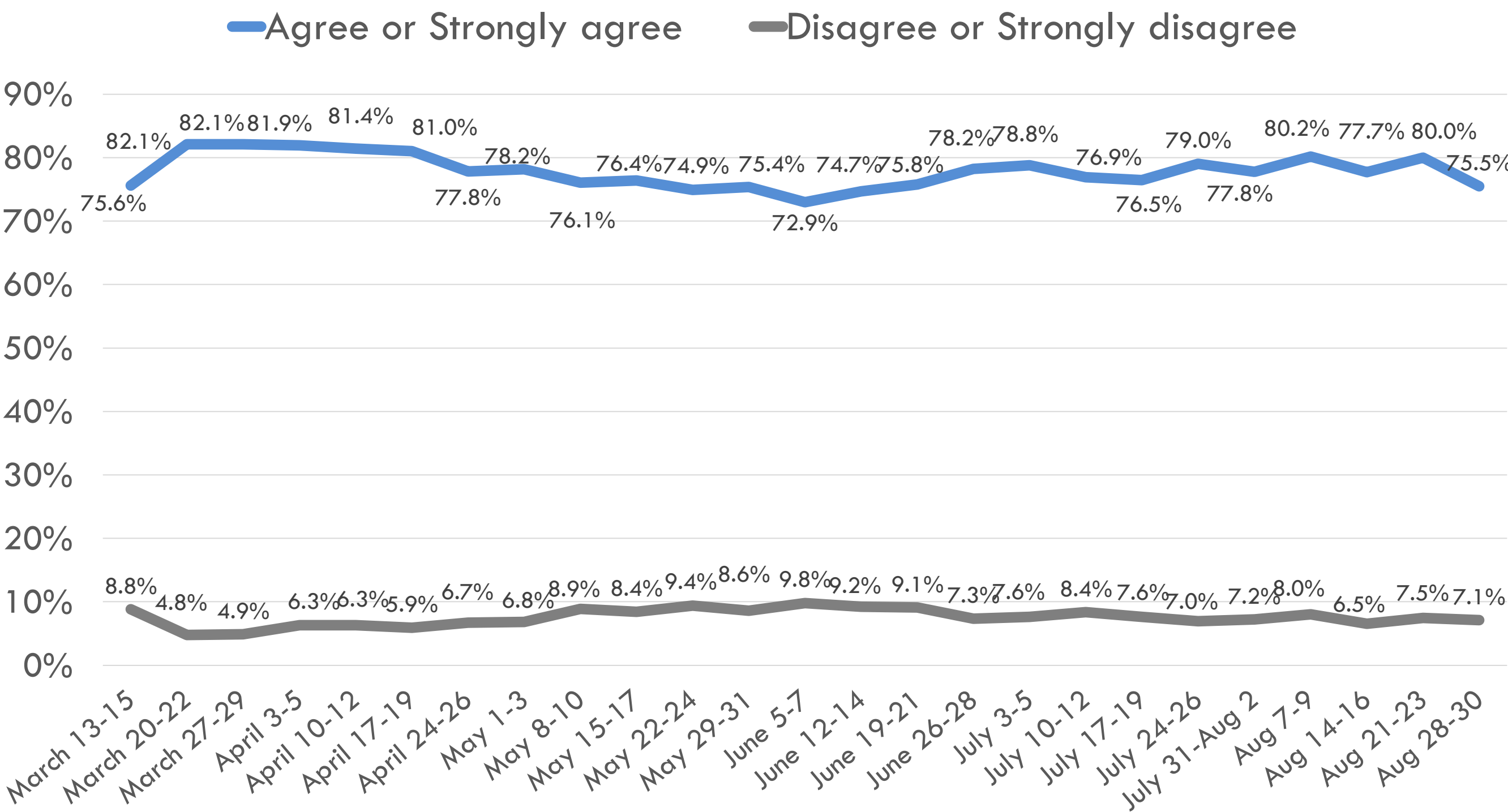
How much do you agree with the following statement?

Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



(Base: Waves 1-25. 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 and 1,250 completed surveys.)

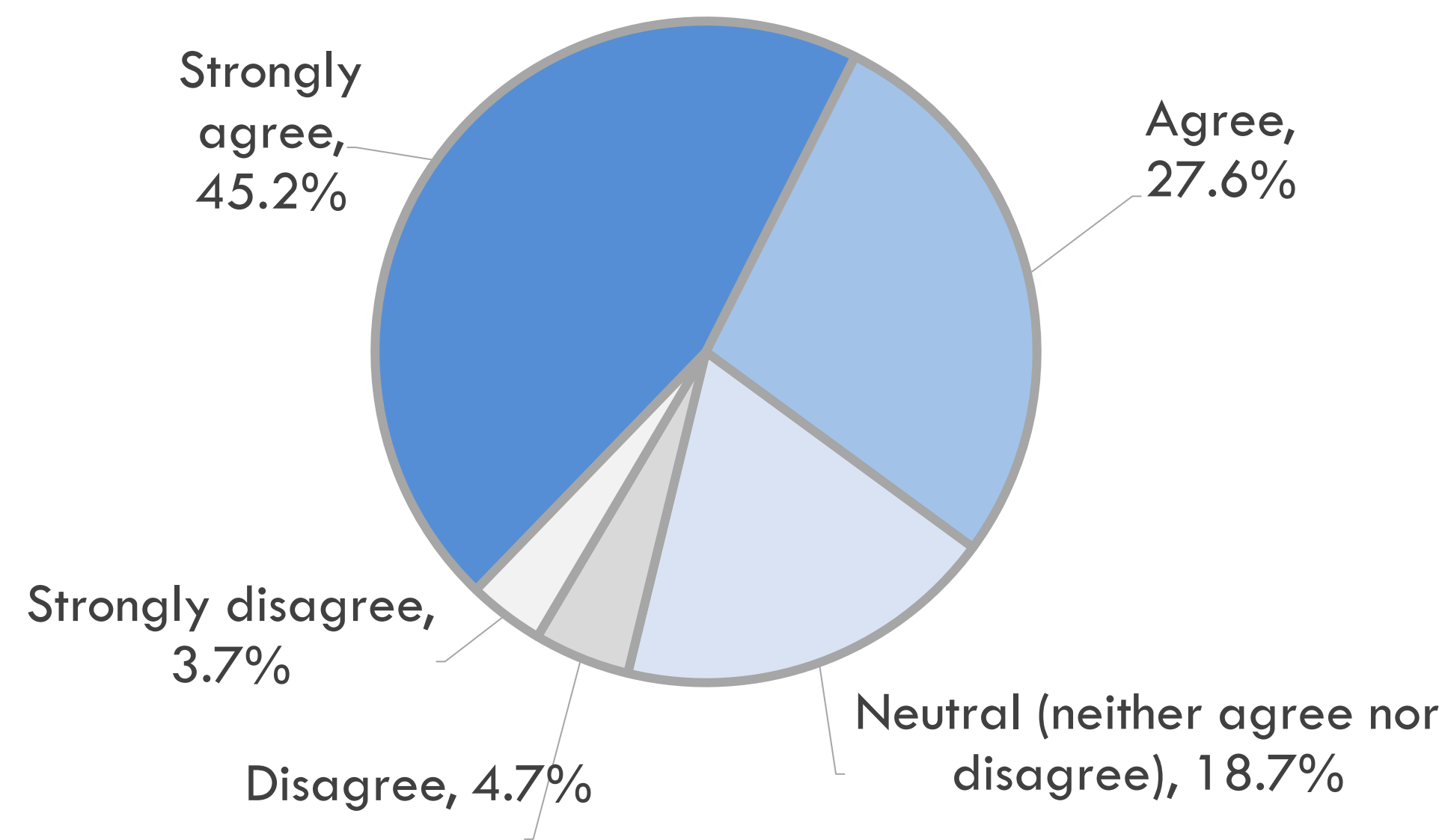
Historical data



AVOIDING CONVENTIONS & CONFERENCES

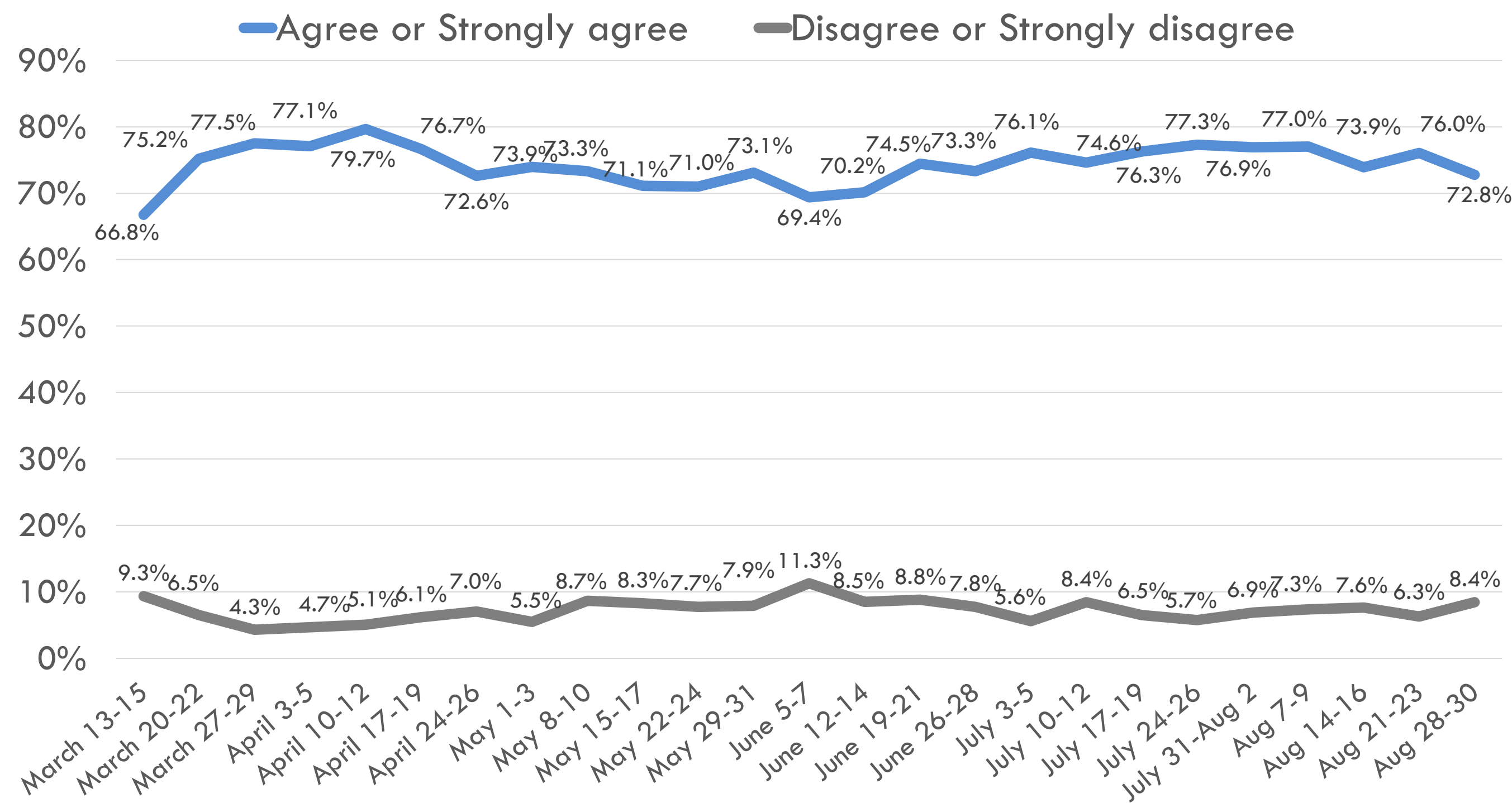
How much do you agree with the following statement?

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



(Base: Waves 1-25. 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 and 1,250 completed surveys.)

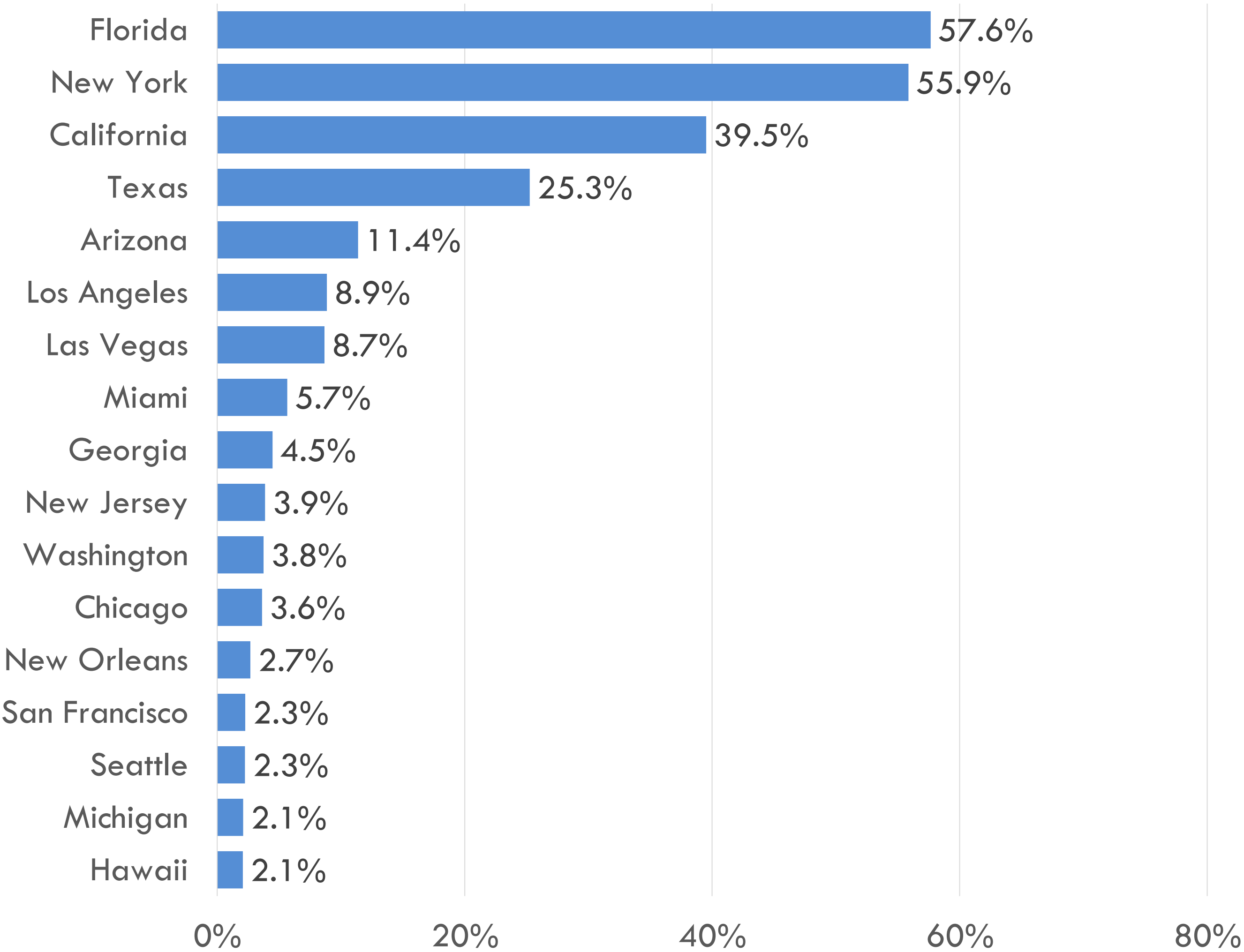
Historical data



MOST TALKED ABOUT CORONAVIRUS HOTSPOTS

Question: What are the **THREE (3)** U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues? (OPEN-ENDED QUESTION)

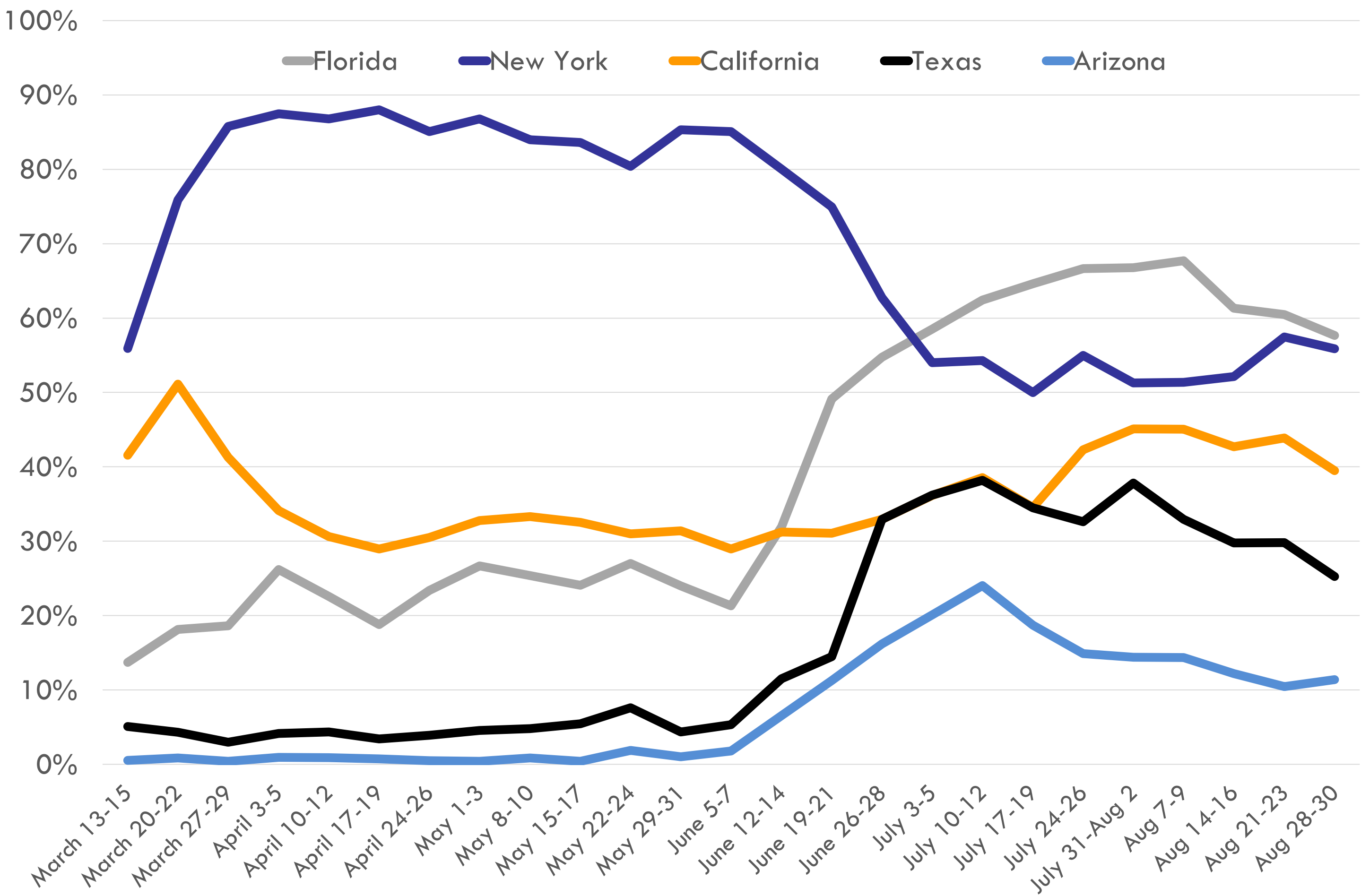
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



MOST TALKED ABOUT CORONAVIRUS HOTSPOTS (WAVES 1-25)

Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues? (OPEN-ENDED QUESTION)

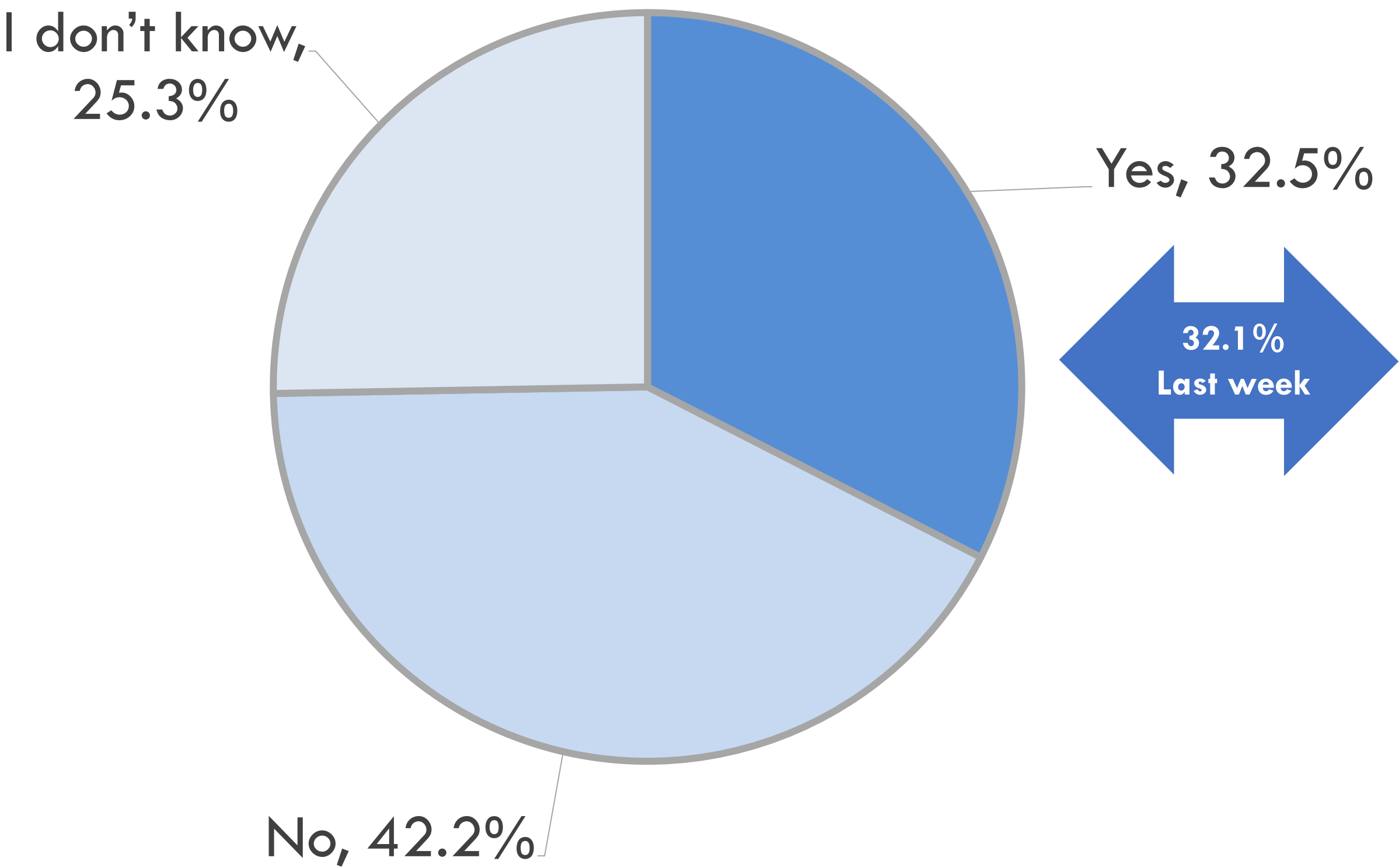
(Base: Waves 1-25. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207 and 1,250 completed surveys.)



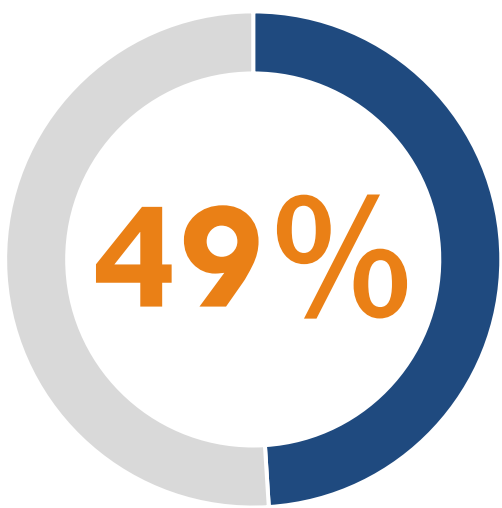
IMPACT OF CORONAVIRUS ISSUES ON FUTURE INTENT TO VISIT

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

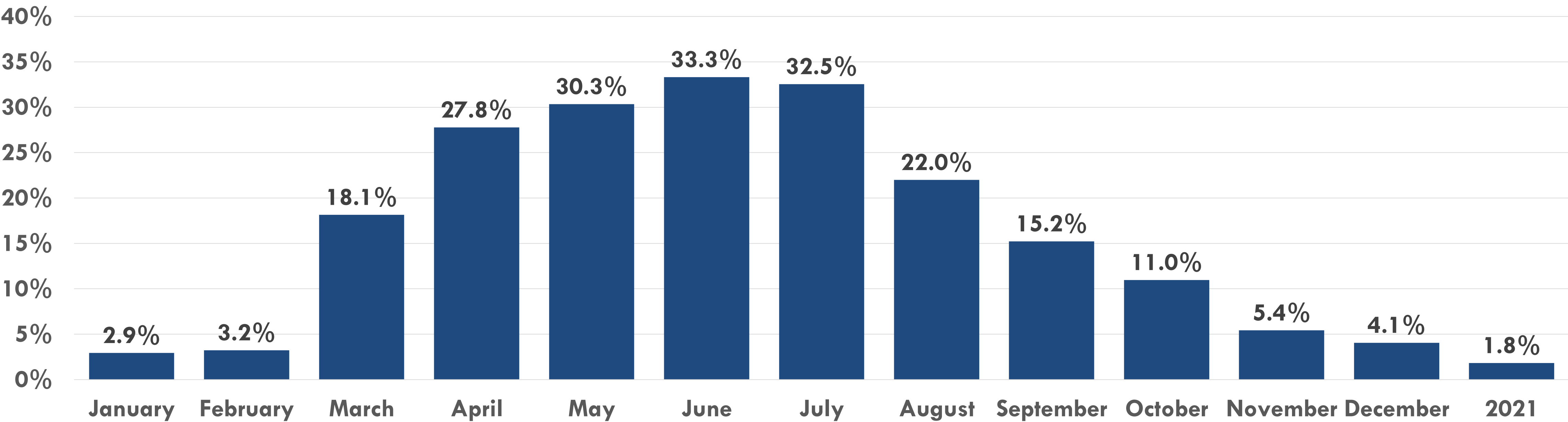
(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



CORONAVIRUS-CAUSED TRIP CANCELLATIONS



of American travelers have cancelled a trip due to the COVID-19 Pandemic. These travelers have cancelled 2.1 trips on average.

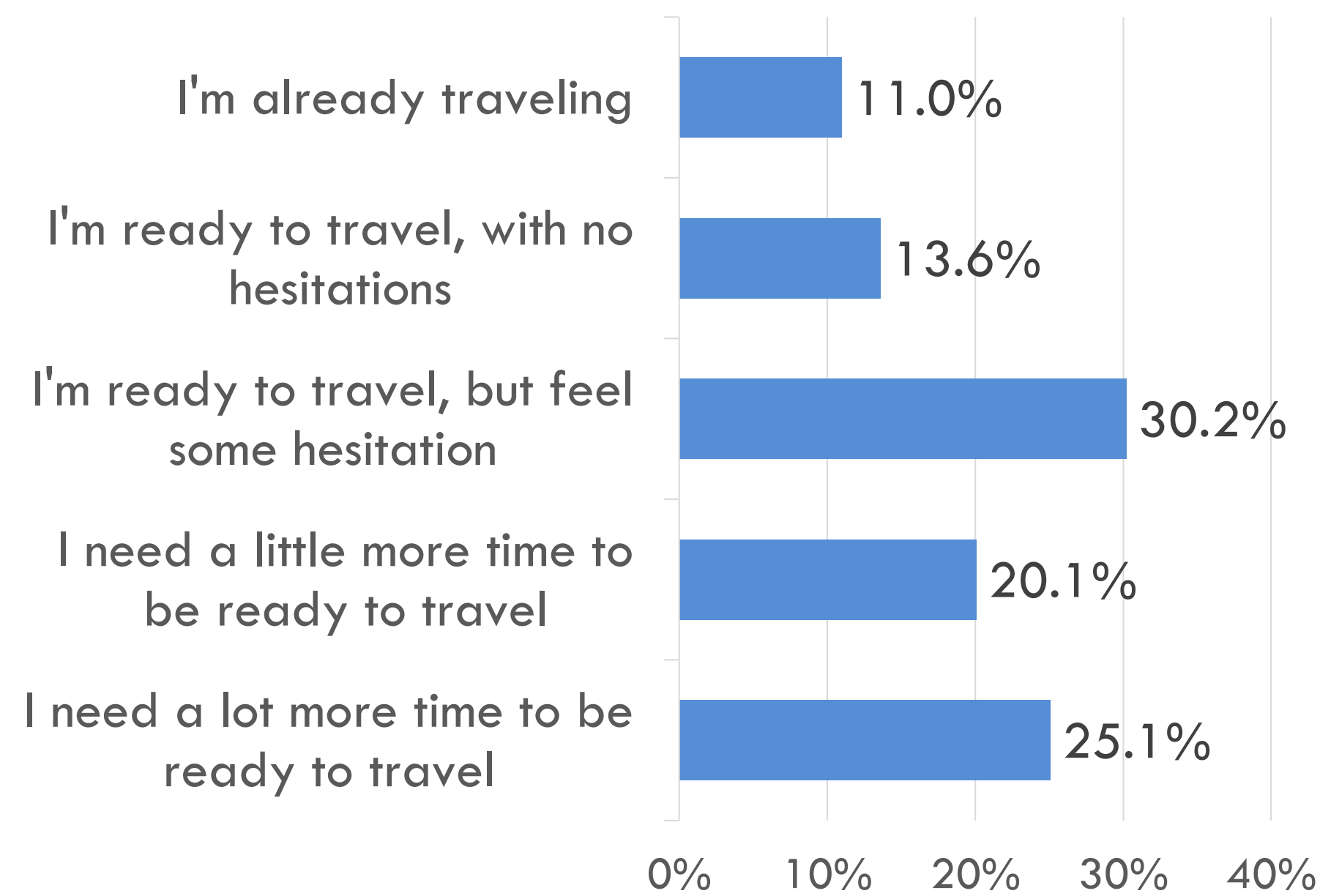


Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(Base: Wave 25 data. Respondents cancelling a trip, 636 completed surveys. Data collected Aug 28-30, 2020)

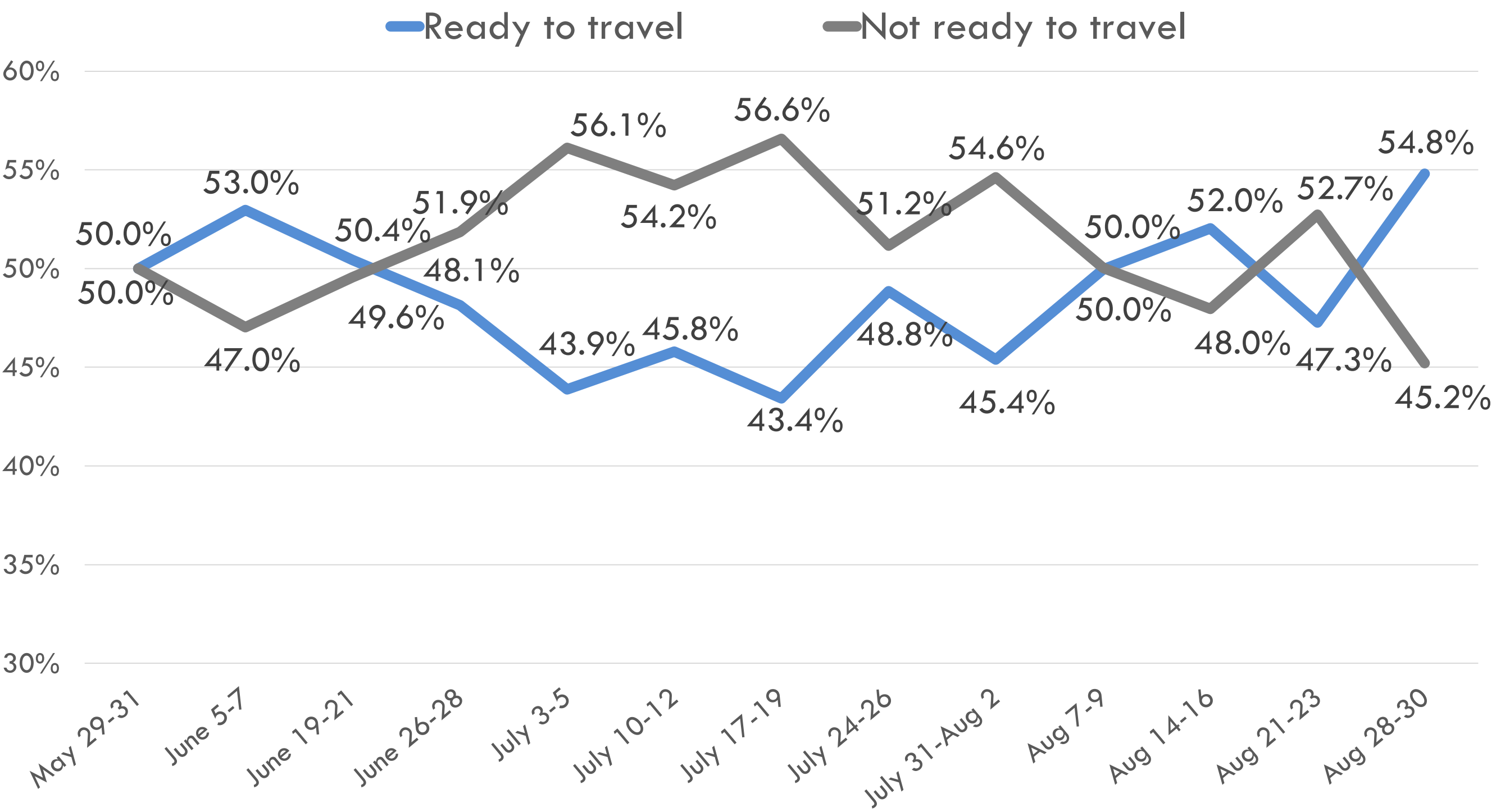
TRAVEL STATE-OF-MIND

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



(Base: Waves 12-13 and 15-25. 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 and 1,250 completed surveys.)

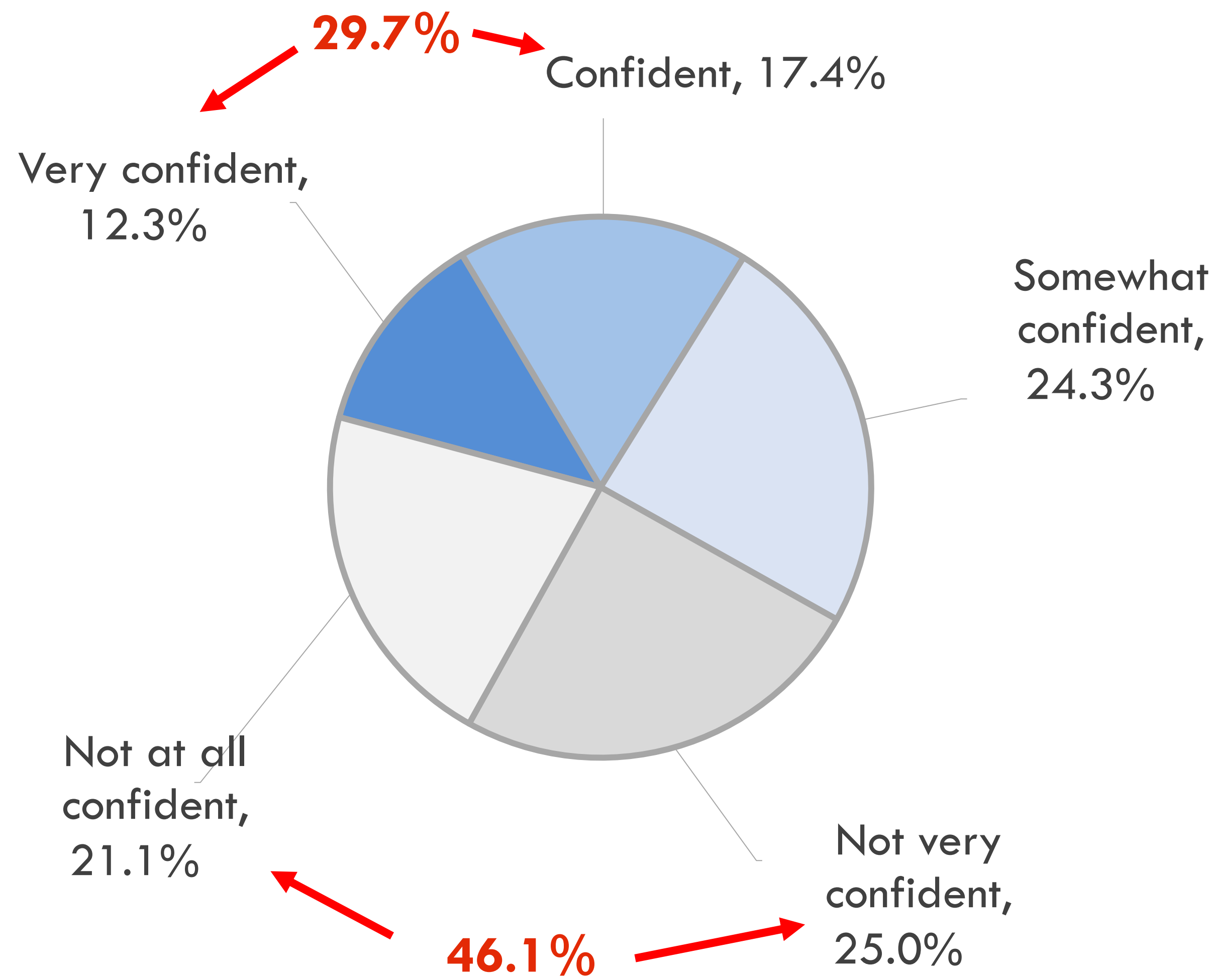
Historical data



CONFIDENCE IN TRAVELING SAFELY IN CURRENT ENVIRONMENT

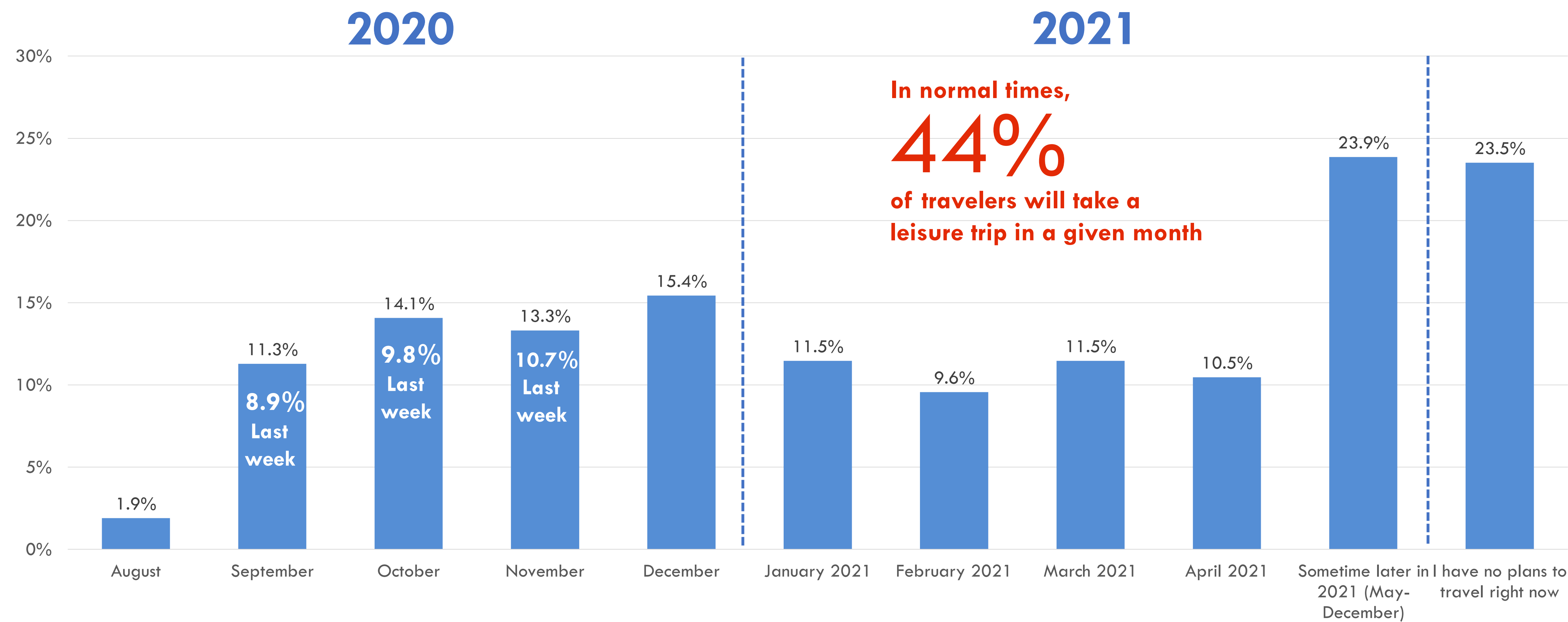
Question: How confident are you that you can travel safely in the current environment?

(Base: Wave 25 data. All respondents, 1,250 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: Waves 25. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

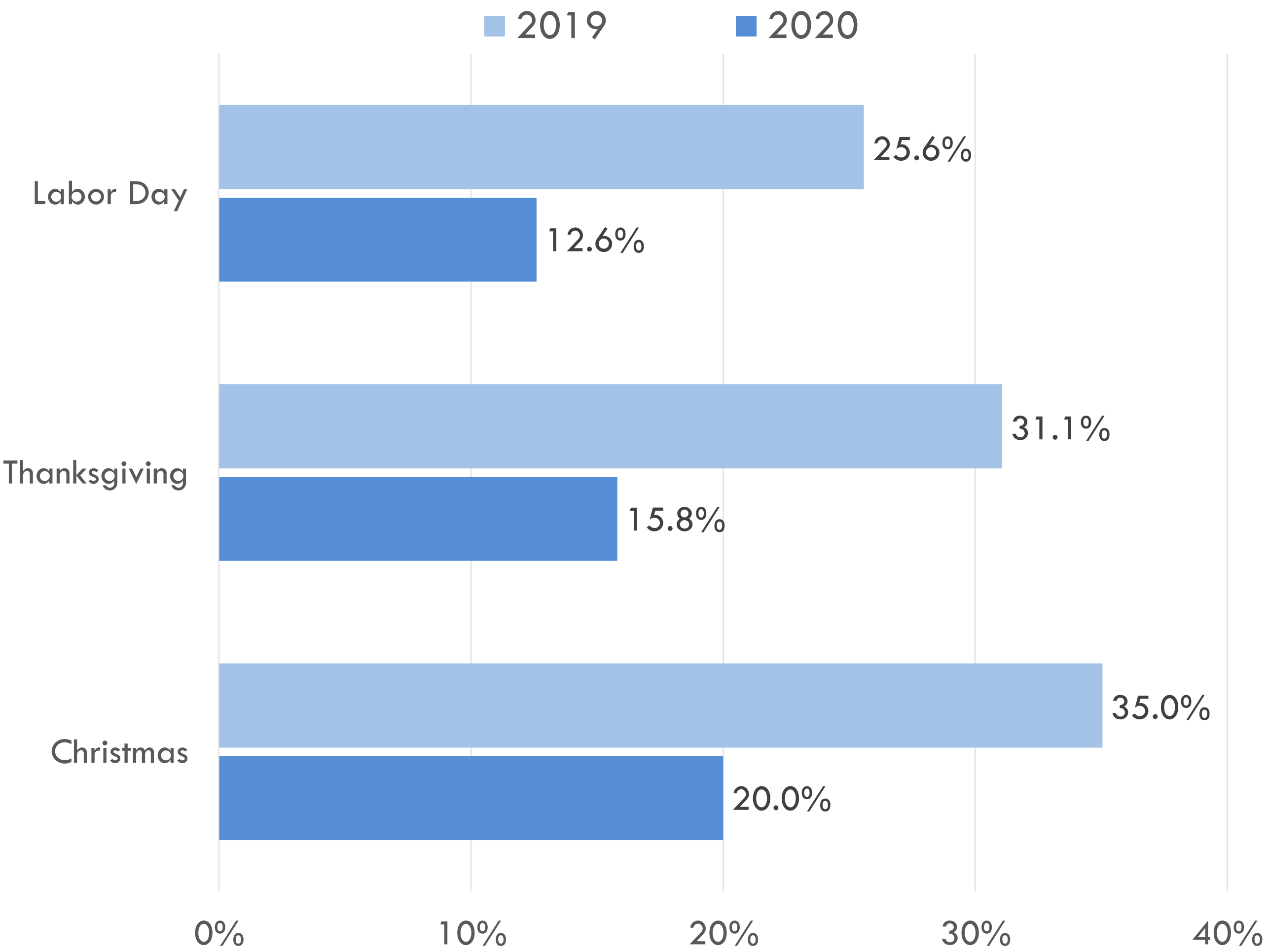
TRAVEL LAST YEAR FOR THE FALL/WINTER HOLIDAYS VS. 2020

Question: Please tell us about your travel LAST YEAR (2019). On each of these holidays, did you take a trip (of at least 50 miles one-way from home)?

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

Question: Will you be traveling for leisure over the Labor Day weekend/Thanksgiving Holiday/Christmas Holiday this year?

(Base: Wave 23 data. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

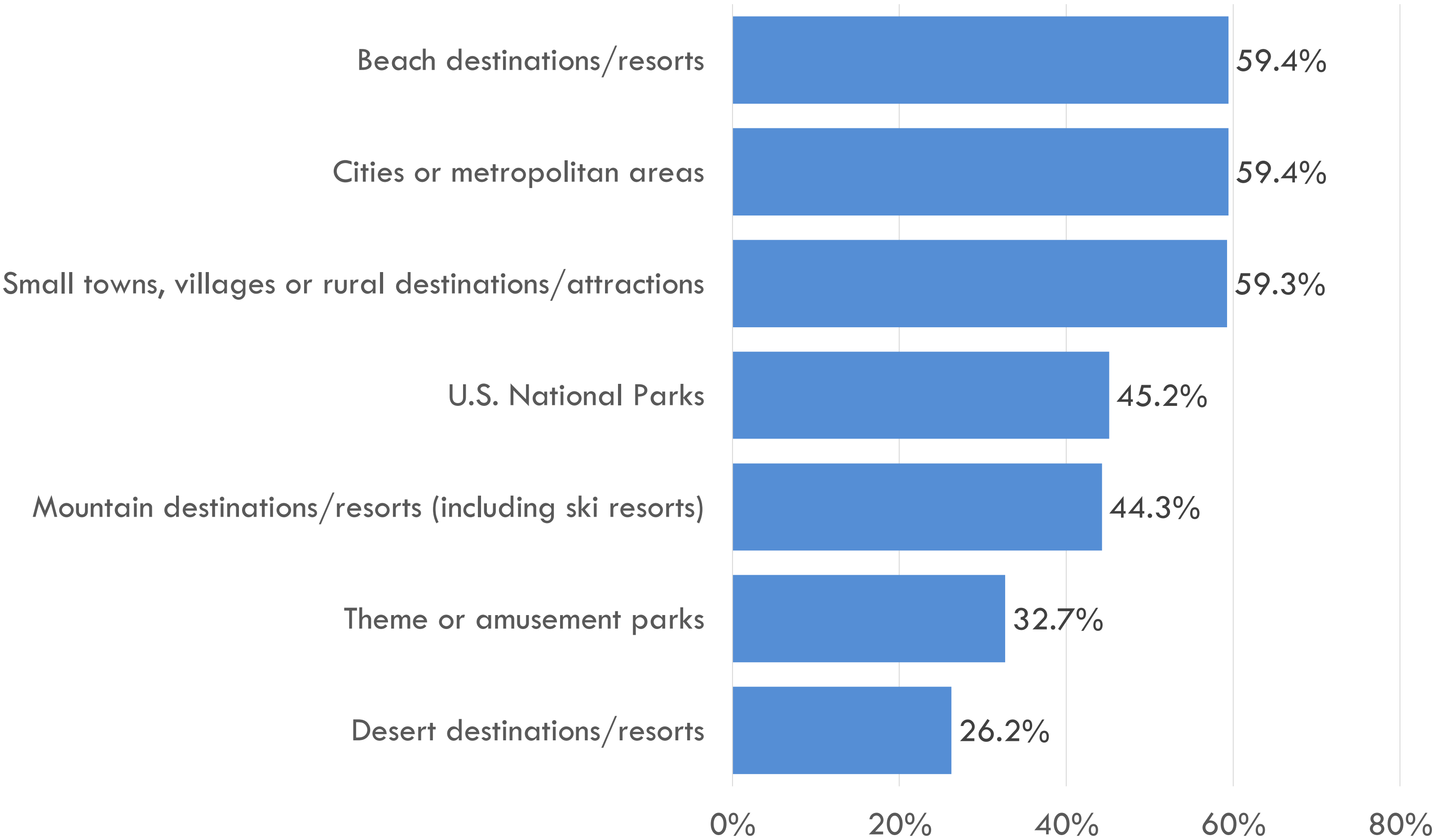


UPCOMING 2020 TRAVELERS: LEISURE TRIPS PLANNED FOR 2020

Question: IN THE REMAINDER OF 2020 (today to December 31), HOW MANY OF YOUR LEISURE TRIPS will likely include the following types of leisure destinations?

(Base: Wave 25 data. Respondents with at least tentative plans to travel in 2020, 480 completed surveys. Data collected Aug 28-30, 2020)

% Expecting to Visit Destination Type at Least Once

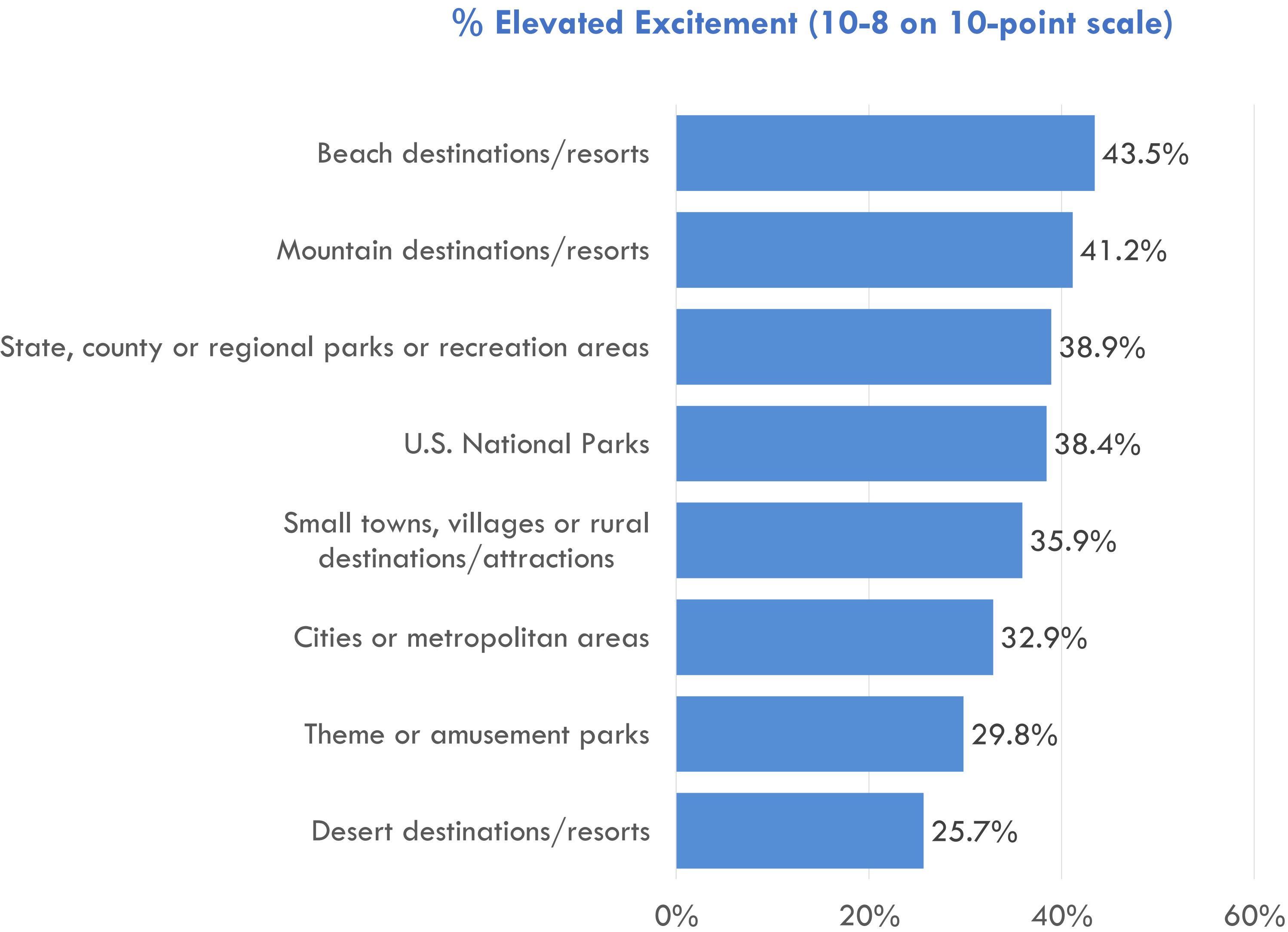


UPCOMING 2020 TRAVELERS: EXCITEMENT BY DESTINATION TYPE

Question: Thinking carefully about THE NEXT FOUR (4) MONTHS:

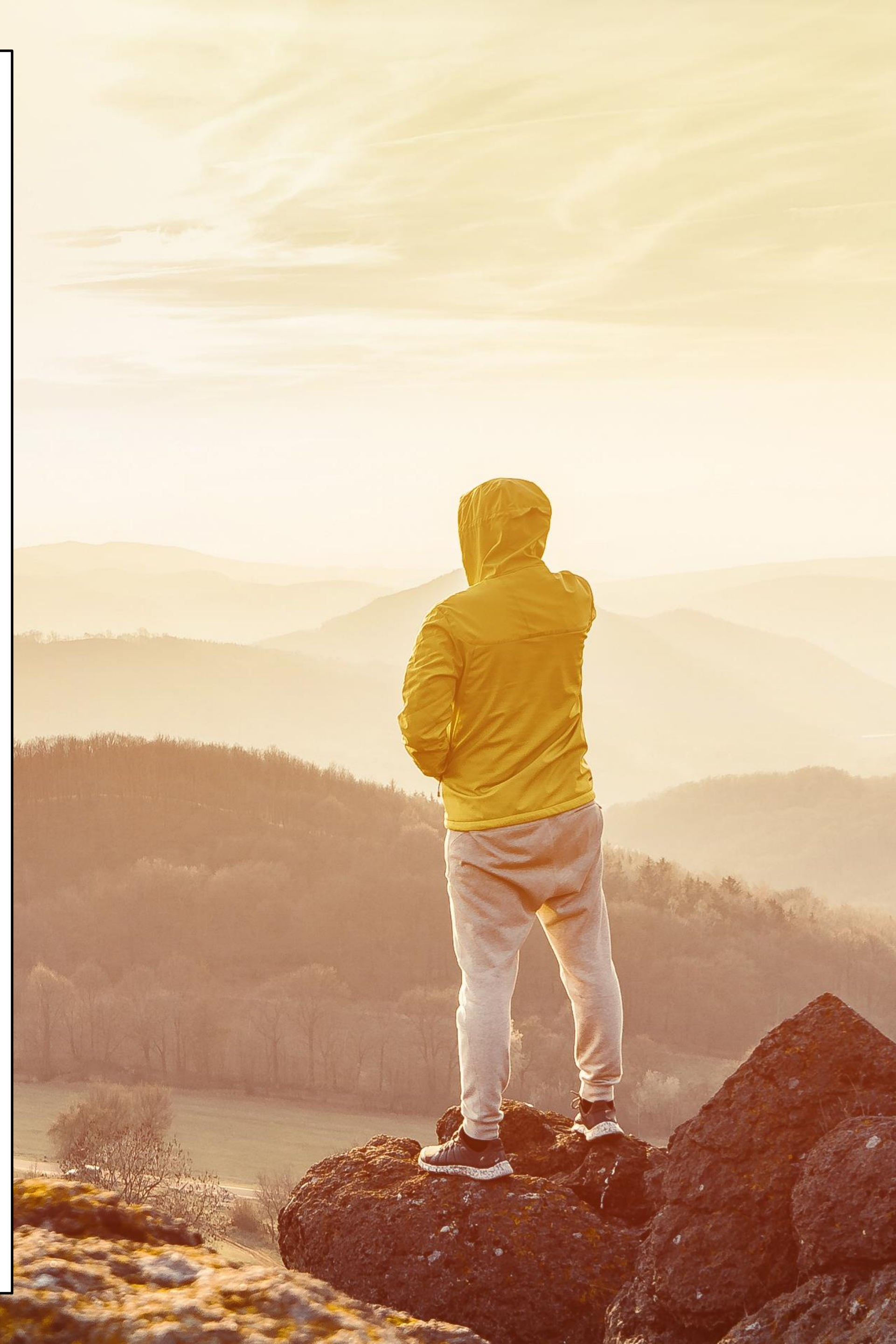
Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the remainder of the year.

(Base: Wave 25 data. Respondents with at least tentative plans to travel in 2020, 480 completed surveys. Data collected Aug 28-30, 2020)



Key Takeaways

- American travelers recorded another measured gain in optimism about the pandemic's course in the next month. Anxiety levels are generally on the decline and positivity towards travel is increasing
- Americans have demonstrated improvement in their state of mind around travel readiness. Fall travel expectations have thus improved
- Although sentiment is turning more positive, the pandemic is nevertheless still impacting travel at a high rate. Trips for the upcoming national Labor Day and Thanksgiving holidays currently look to be off by half compared to 2019
- Americans traveling this year show particular enthusiasm for beach and mountain destinations



Marketing Travel Now





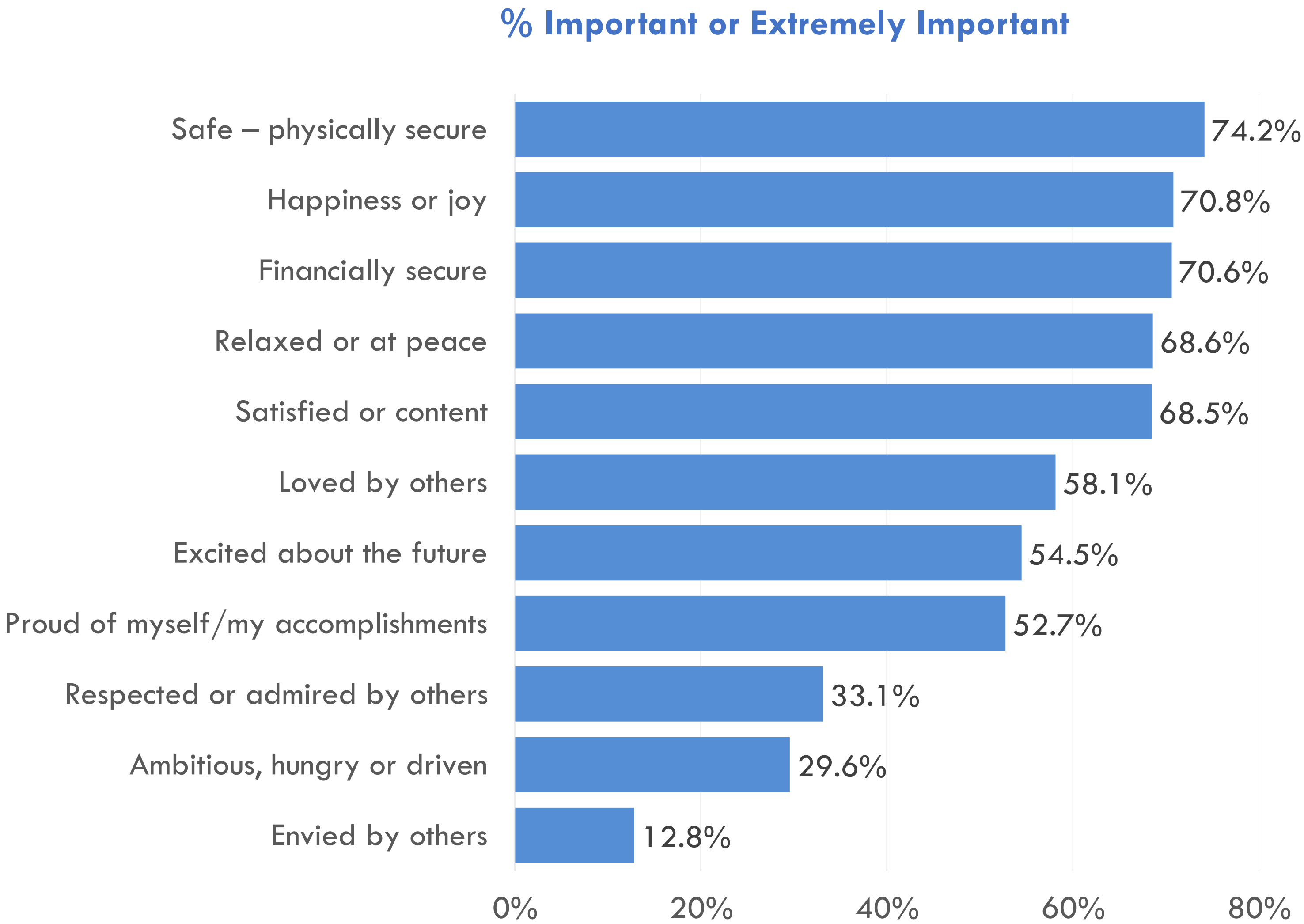
Desired Emotional States + Travel

IMPORTANCE OF EMOTIONS

Question: Please consider the following feelings or emotional states. However you define each, as you think about your life priorities **HOW IMPORTANT** is it that you feel each in your life? (Select one to fill in the blank for each)

This is _____ to me.

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

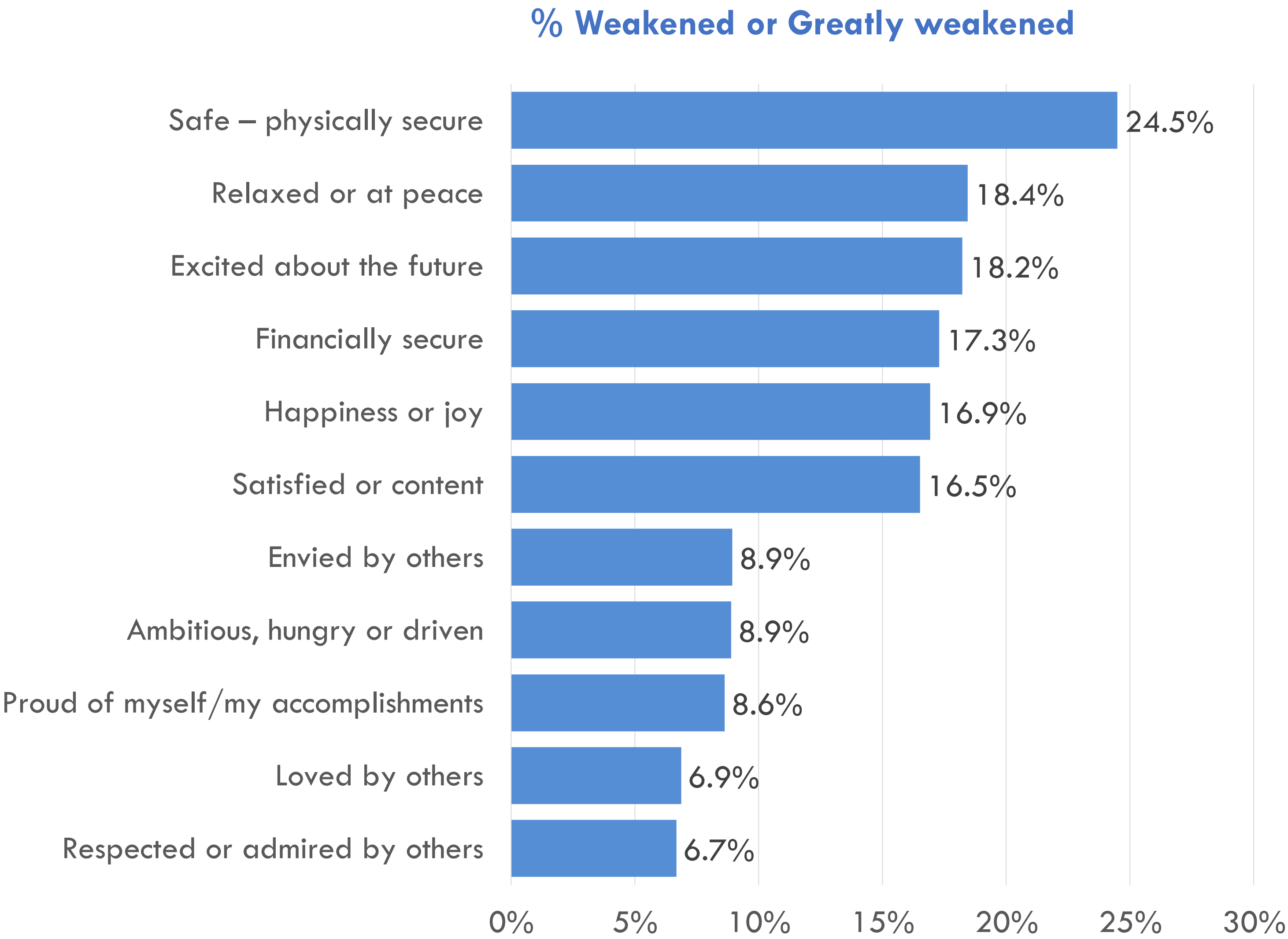


IMPACT OF PANDEMIC ON EMOTIONS

Question: In your daily life, how has the Coronavirus pandemic affected your personal sense of each? (Select one for each)

The Coronavirus pandemic has _____ how I feel this in my daily life.]

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

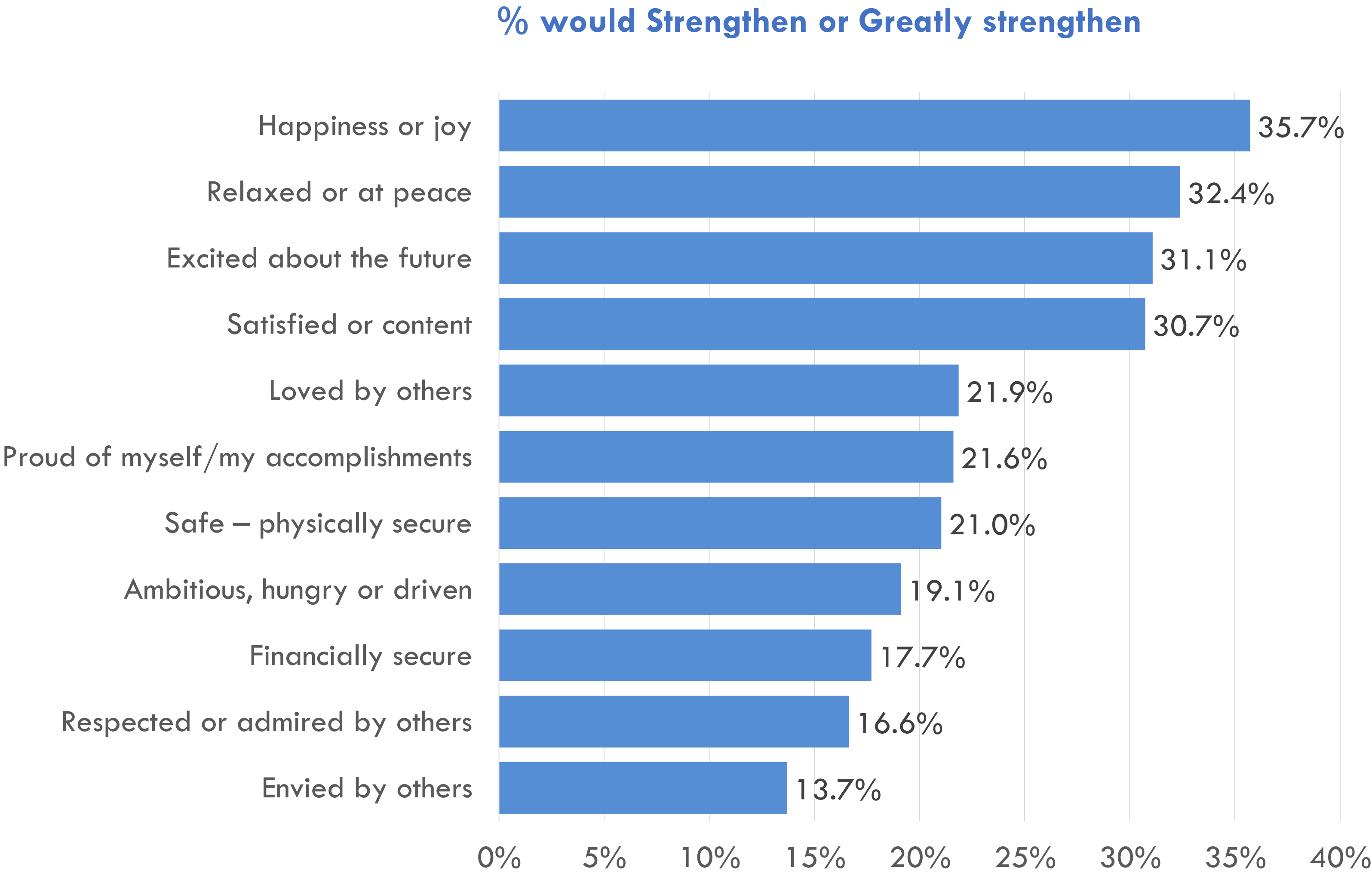


HOW TRAVEL IMPACTS THESE EMOTIONS

Question: Finally, please think about how you think **LEISURE TRAVEL** would affect your feelings. If you were to take a vacation later this year, how would this affect your feelings? (Select one to fill in the blank)

A vacation would _____ my feelings of this.

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



HOW TRAVEL IMPACTS THESE EMOTIONS

Emotion	Importance	Pandemic has weakened	Travel would strengthen
Safe – physically secure	85.3%	44.7%	33.7%
Relaxed or at peace	84.7%	39.3%	54.4%
Happiness or joy	84.6%	39.0%	57.7%
Financially secure	84.1%	36.0%	30.1%
Satisfied or content	83.9%	36.3%	53.2%
Excited about the future	77.1%	39.5%	50.9%
Loved by others	76.0%	11.2%	35.6%
Proud of myself/my accomplishments	74.2%	17.8%	39.5%
Respected or admired by others	56.7%	13.9%	28.8%
Ambitious, hungry or driven	48.2%	19.6%	32.0%
Envied by others	22.5%	15.1%	24.4%

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Desired Emotional States: Generational/Life Stage Differences

- Millennials assign more importance to feeling ambitious and envied relative to Gen X and Boomers. For emotional states such as happiness, safety, financially secure and excited about the future, Boomers feel these are even more important than younger generations currently do
- Relative to older generations, Millennials particularly feel the pandemic has weakened their ability to feel loved by others, proud of themselves and their accomplishments, admired by others, and financially secure
- Millennials more often reported feeling that travel strengthened desired emotional states, while Boomers were less likely to feel this way. Millennials reported that travel would especially strengthen their ability to feel ambitious, physically secure, proud of themselves and admired and envied by others, and excited about the future



“Taking trips/travel is/was the highlight of my year. It brings be happiness knowing I have a getaway to look forward to and put any issues at the workplace or at home on pause and relax. Planning a trip helps me look forward to the future and allows me to tolerate work and give me somewhat of a purpose.”

“This is tough because I want to have the freedom to travel as I did before but until there is a vaccine, I won't be traveling. Right now, travel creates a feeling of nostalgia and the hope of getting back to this in the future. The thought of travel creates my excitement about the future. ”

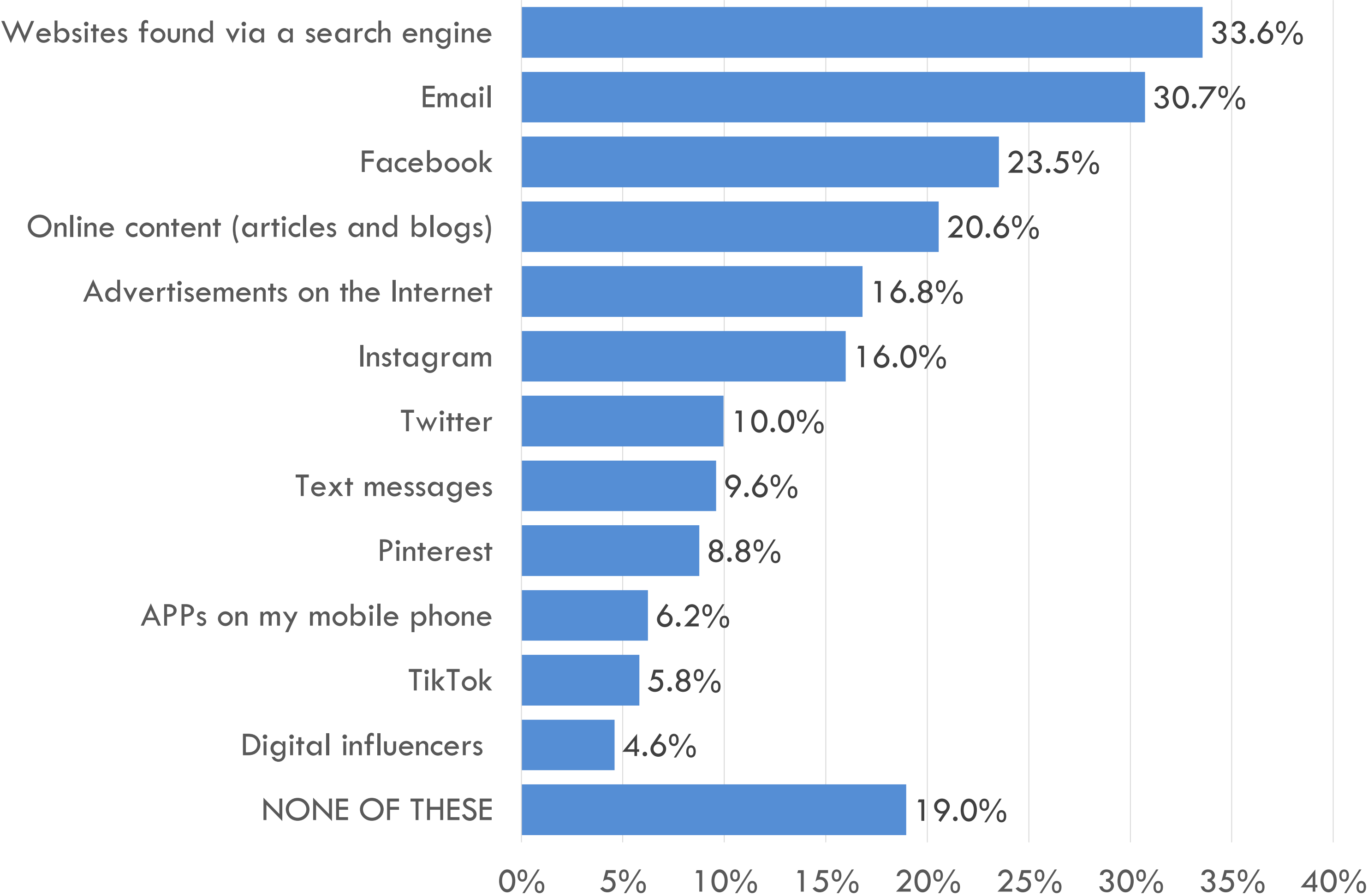
“Travel in general is very important to my happiness and personal enrichment. I am very unhappy we cannot travel as freely as we would like.”



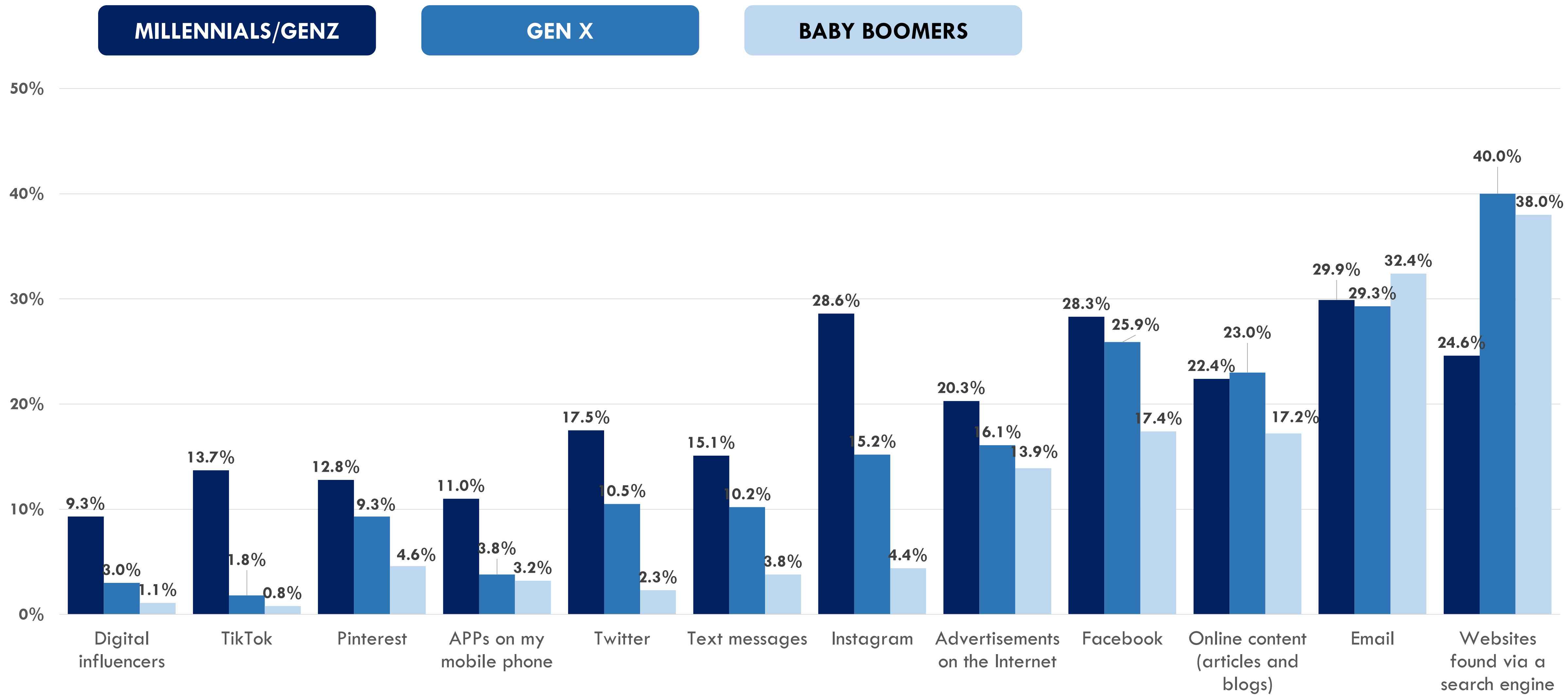
RECEPTIVITY TO MARKETING CHANNELS

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit? (Please select all that apply)

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



RECEPTIVITY TO MARKETING CHANNELS BY GENERATION



Key Takeaways

- Feeling safe, financially secure, happy, having peace of mind and satisfied are most important to American travelers right now
- Unfortunately, the pandemic has weakened many Americans' ability to achieve these emotional states, as well as feel excited about the future
- Travel, however, is seen as a means to achieving desired emotional states, with over a third of American travelers feeling that if they took a trip this year, the emotions most negatively impacted by the pandemic would strengthen
- Email is an effective means of reaching all generations. Gen X and Boomers are more receptive to travel messaging via search engine marketing right now, while Millennial and younger travelers are more receptive to travel marketing via social media

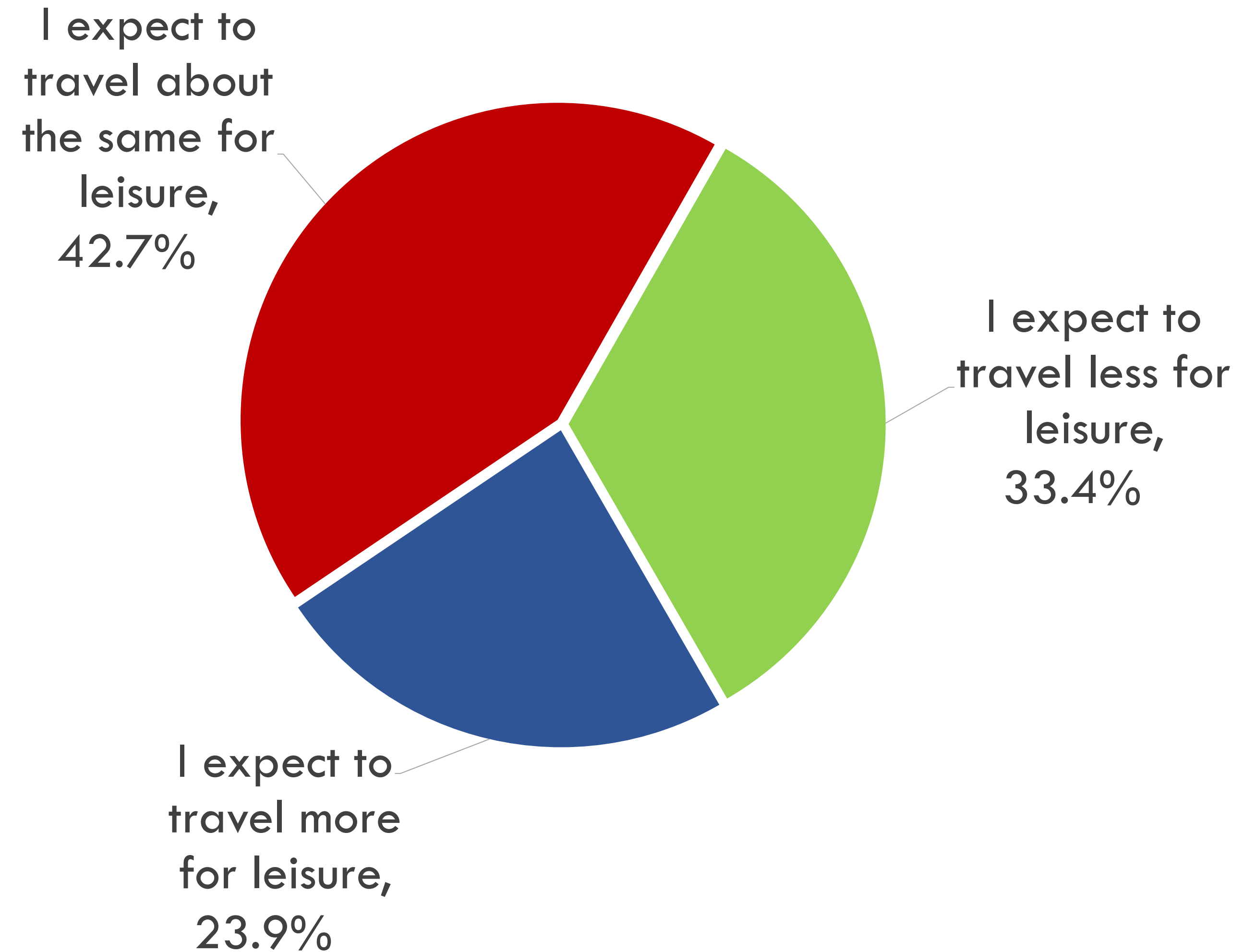




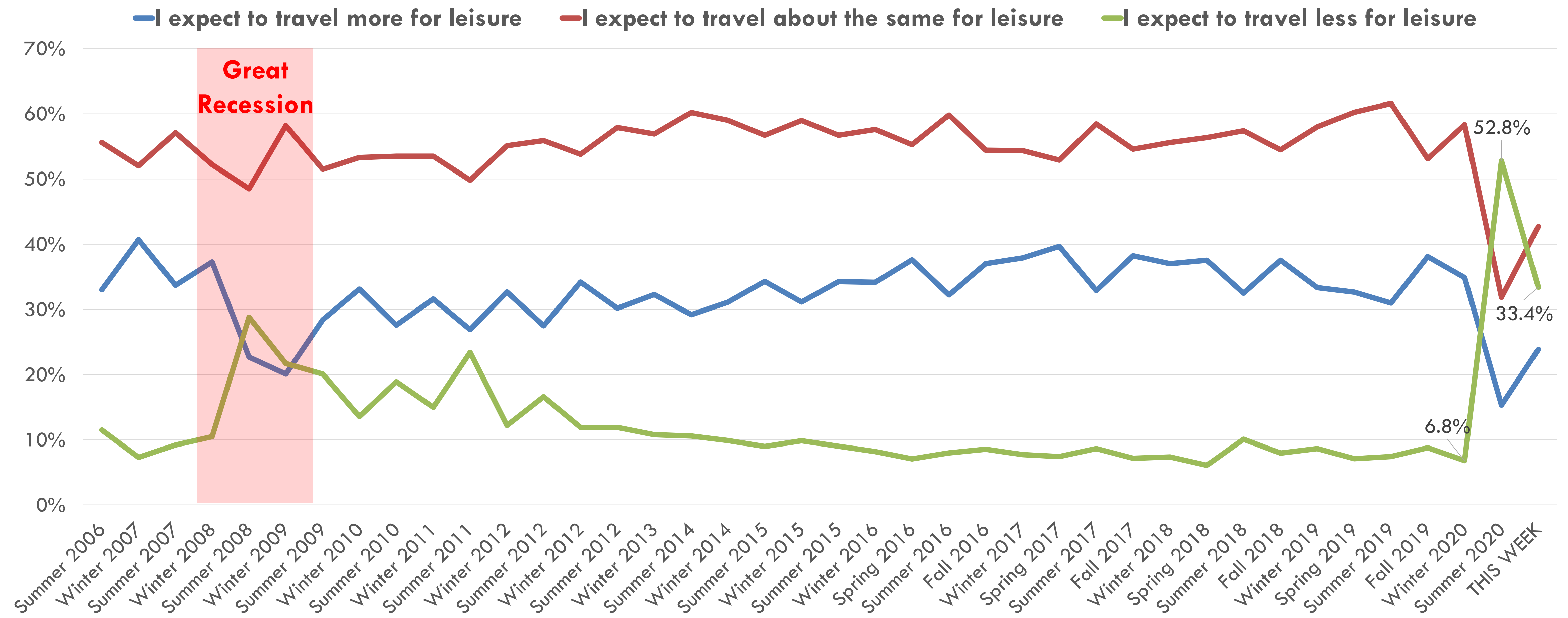
Traveler Expectations for the Next Year

TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS

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

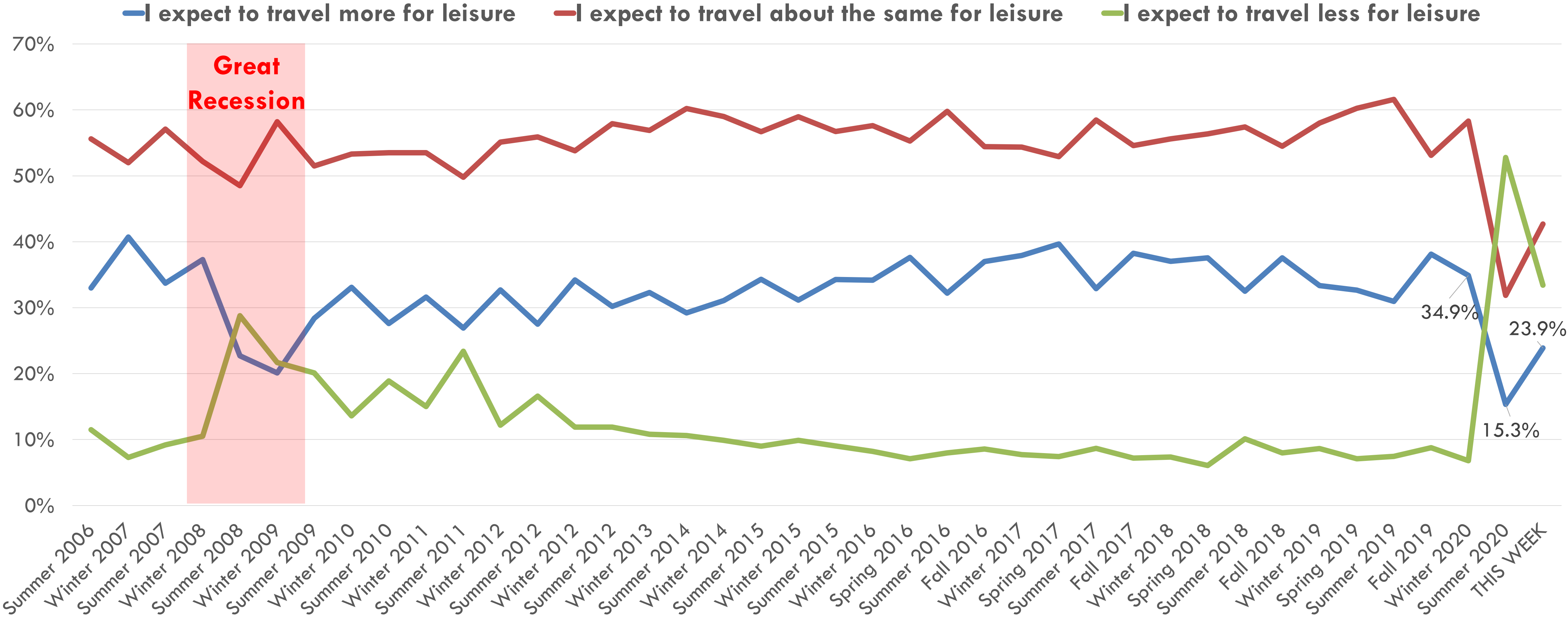


TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



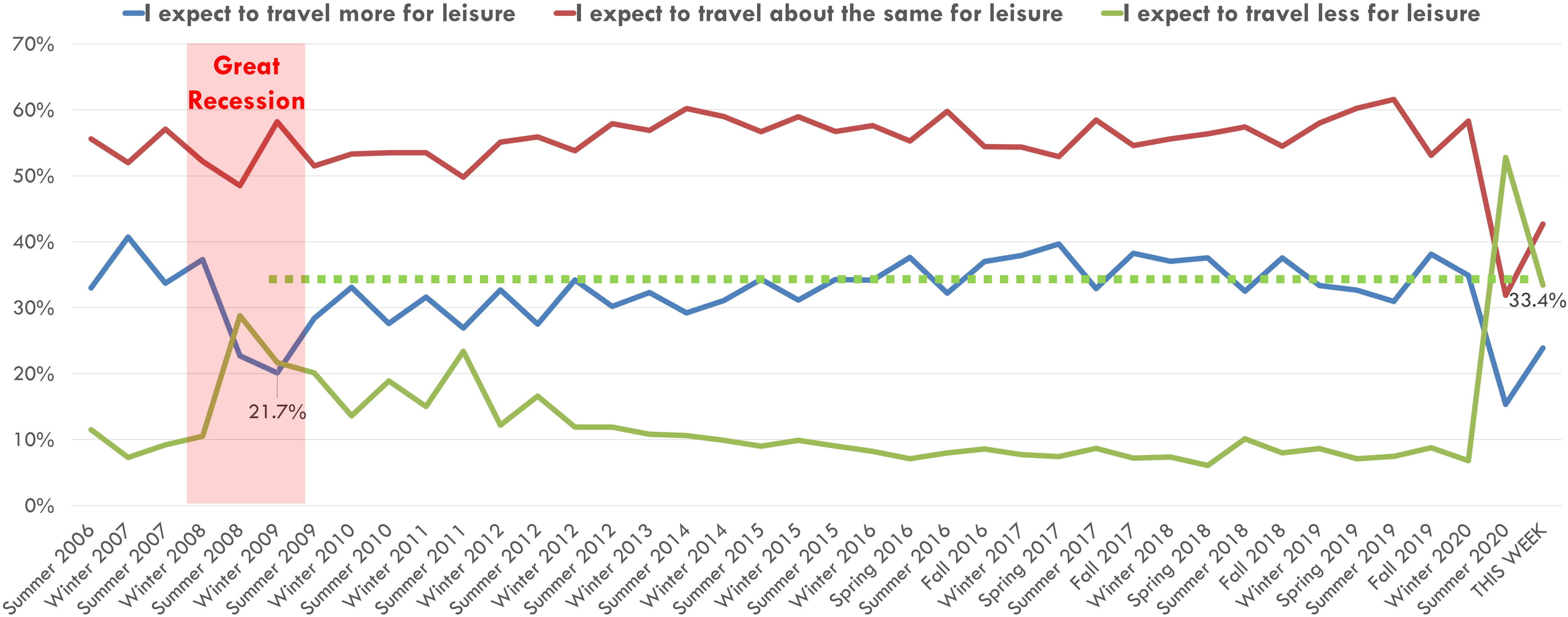
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TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



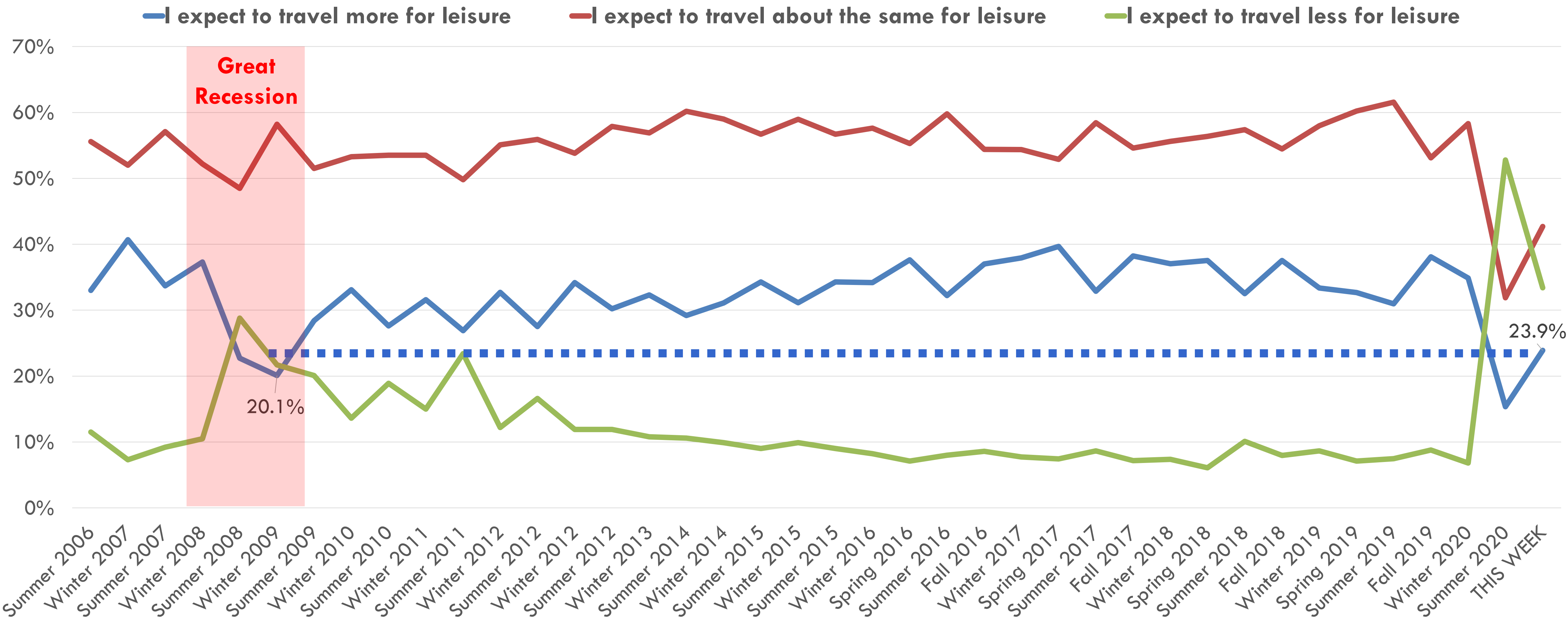
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TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



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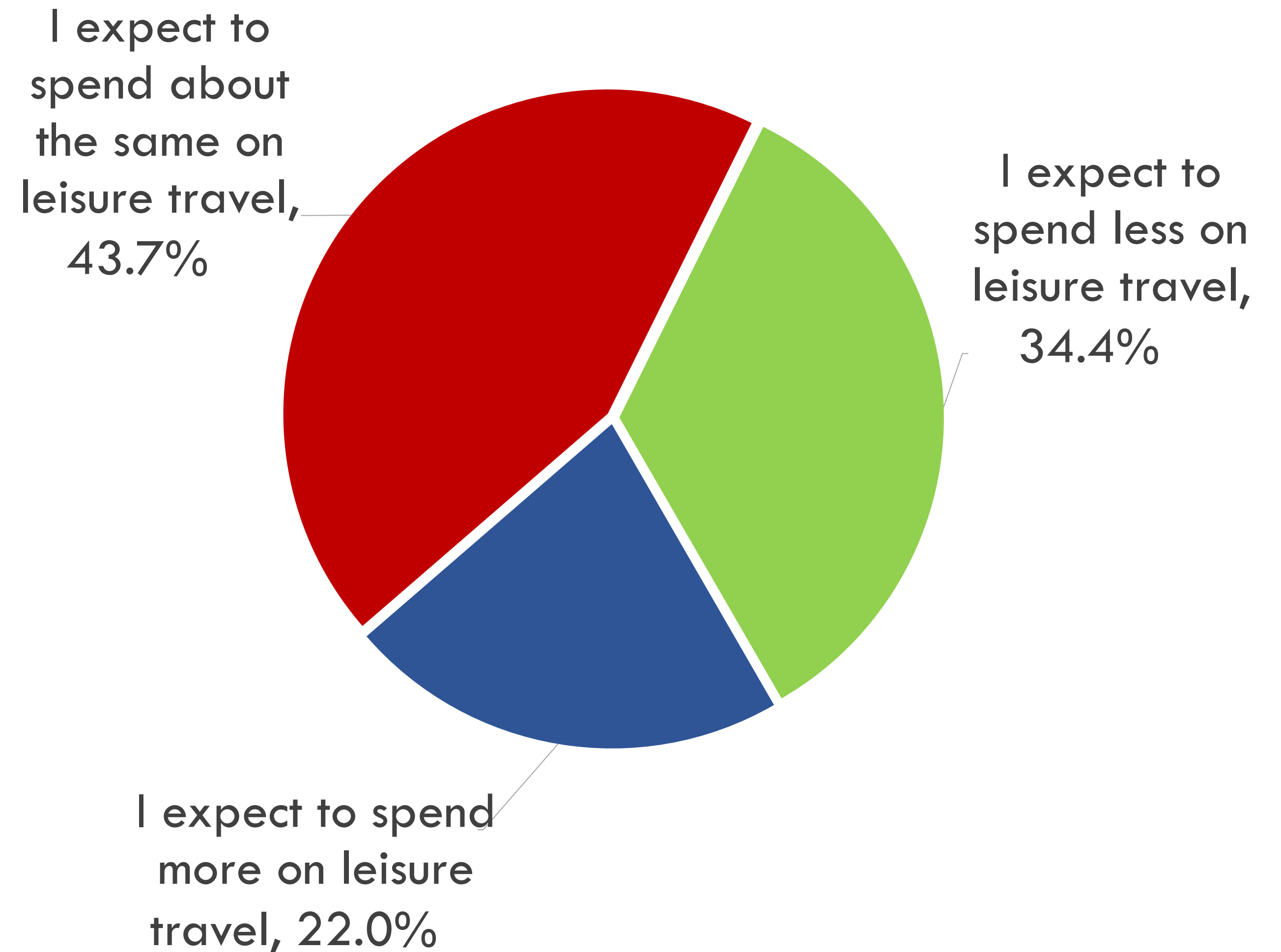
TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



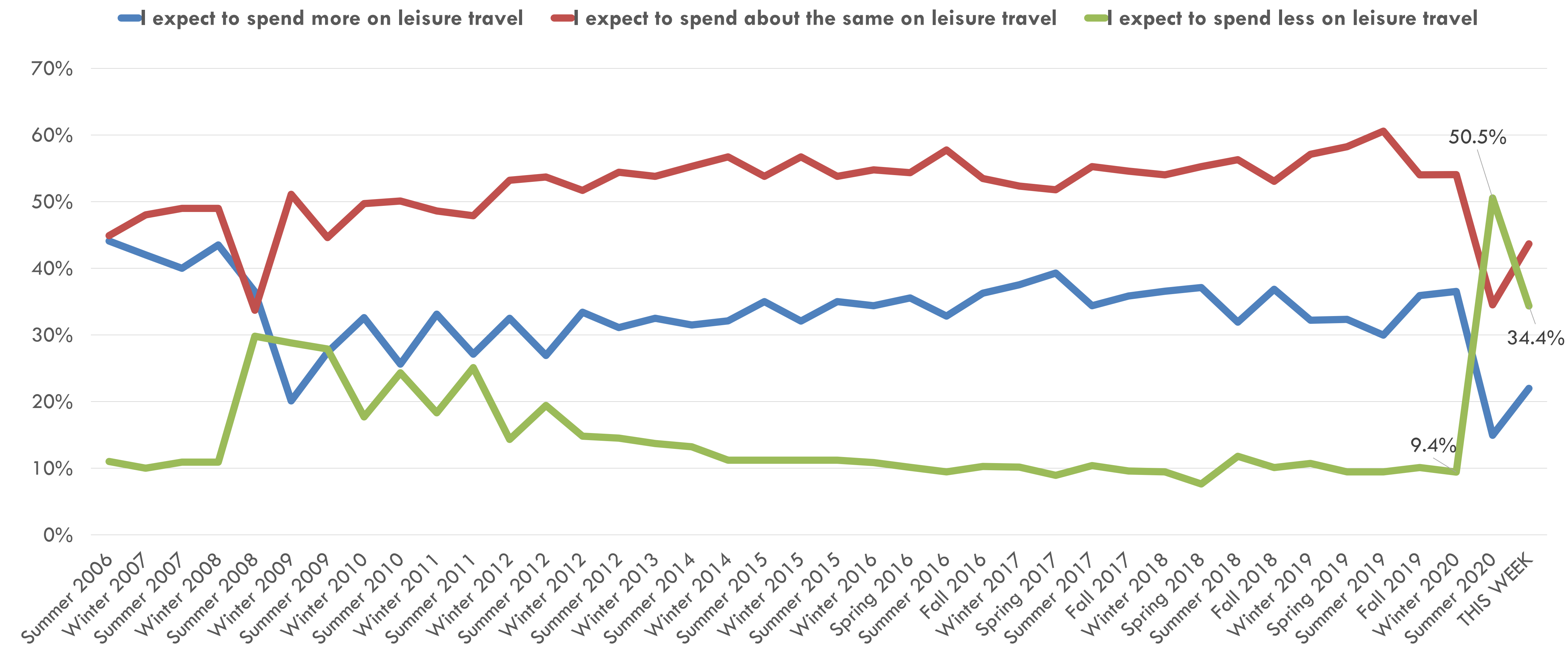
Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)

TRAVEL IN THE NEXT TWELVE MONTHS: SPENDING

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

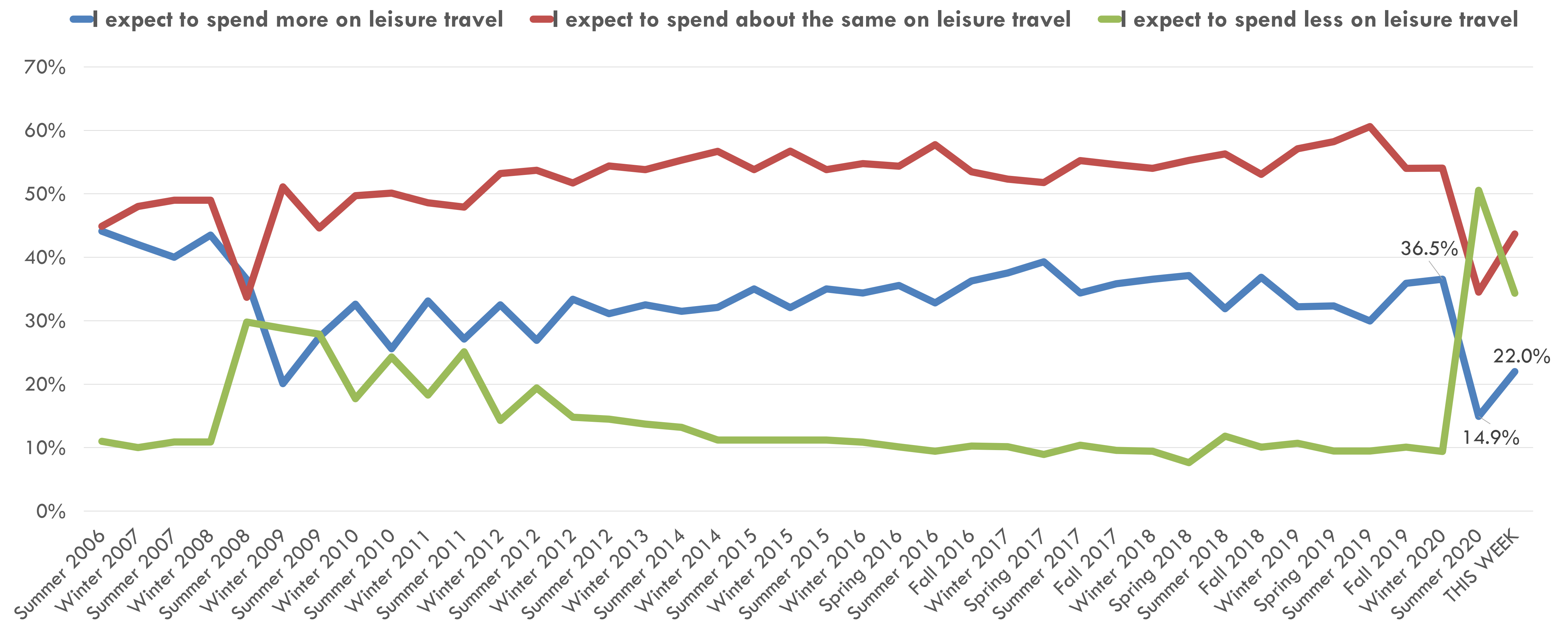


TRAVEL IN THE NEXT TWELVE MONTHS: SPENDING



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

TRAVEL IN THE NEXT TWELVE MONTHS: SPENDING



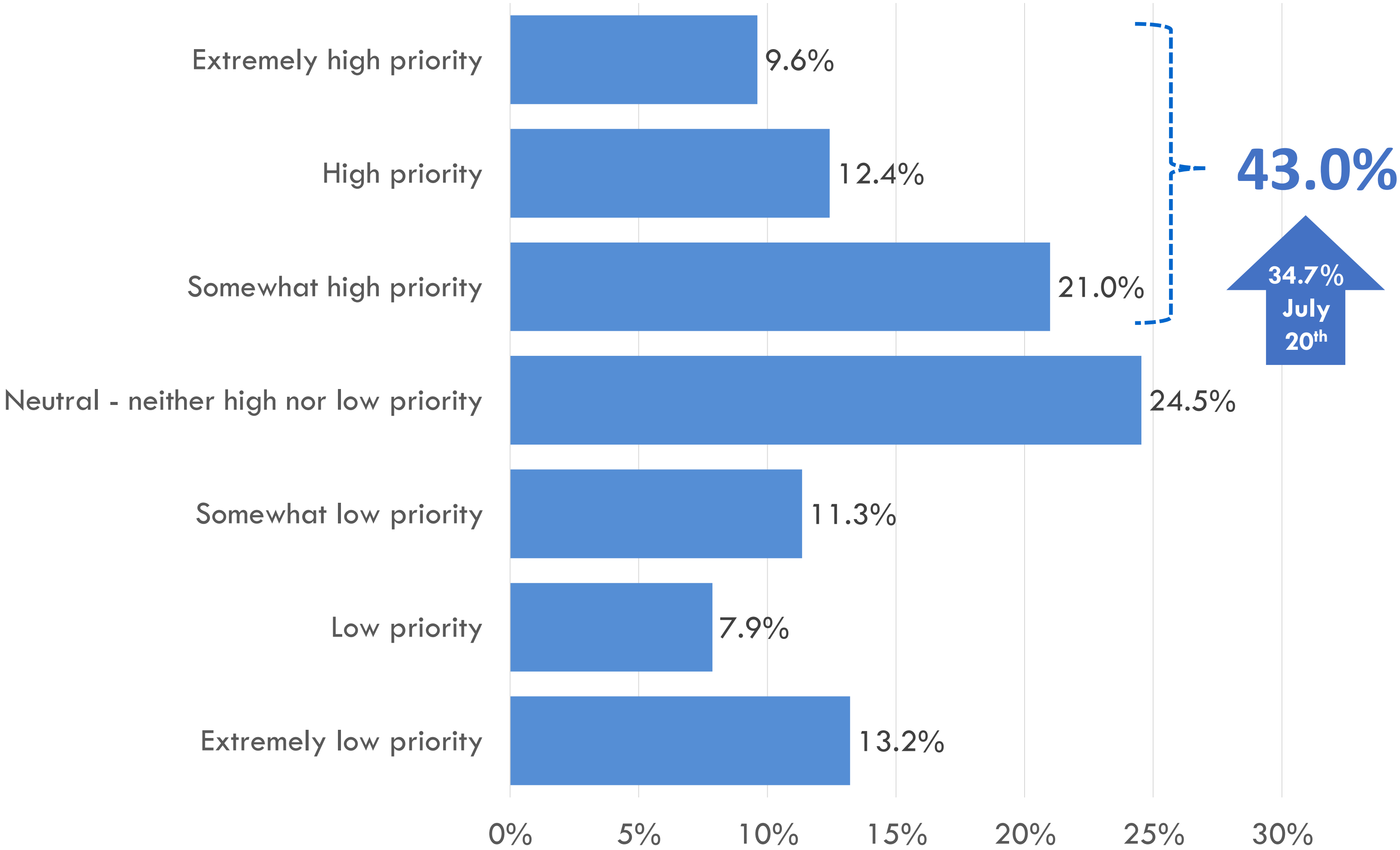
Question: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?

LEISURE TRAVEL AS A SPENDING PRIORITY

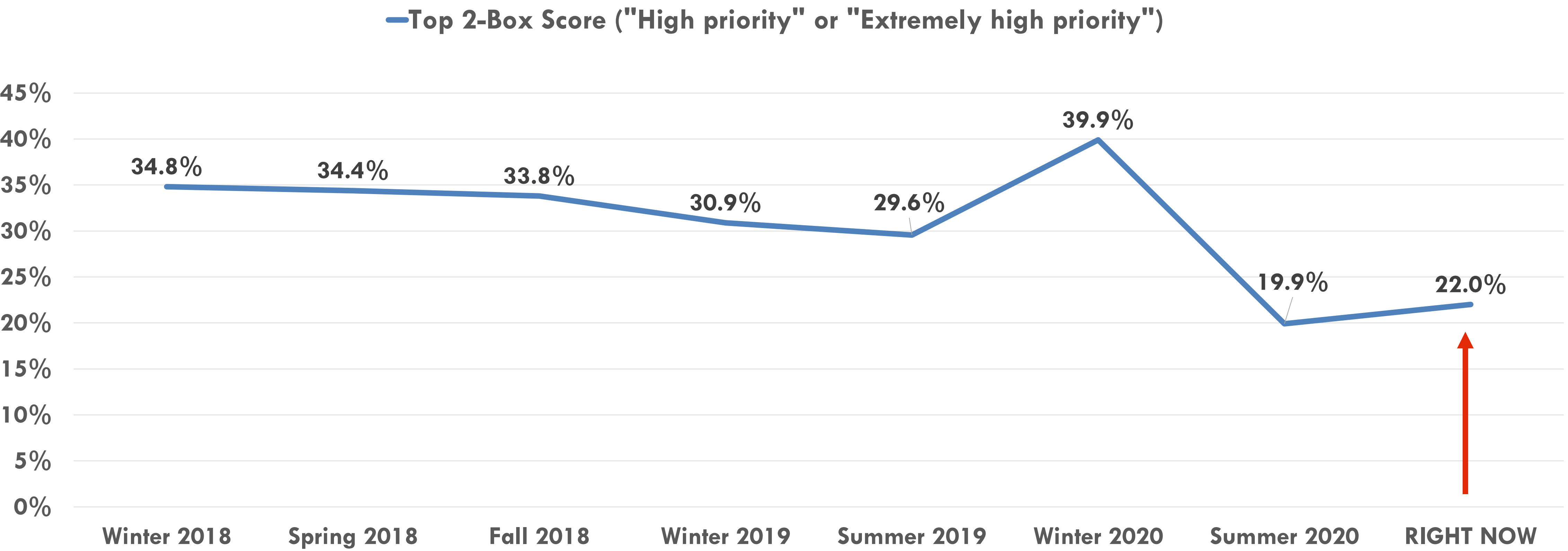
Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

Leisure travel will be a _____

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



LEISURE TRAVEL AS A SPENDING PRIORITY

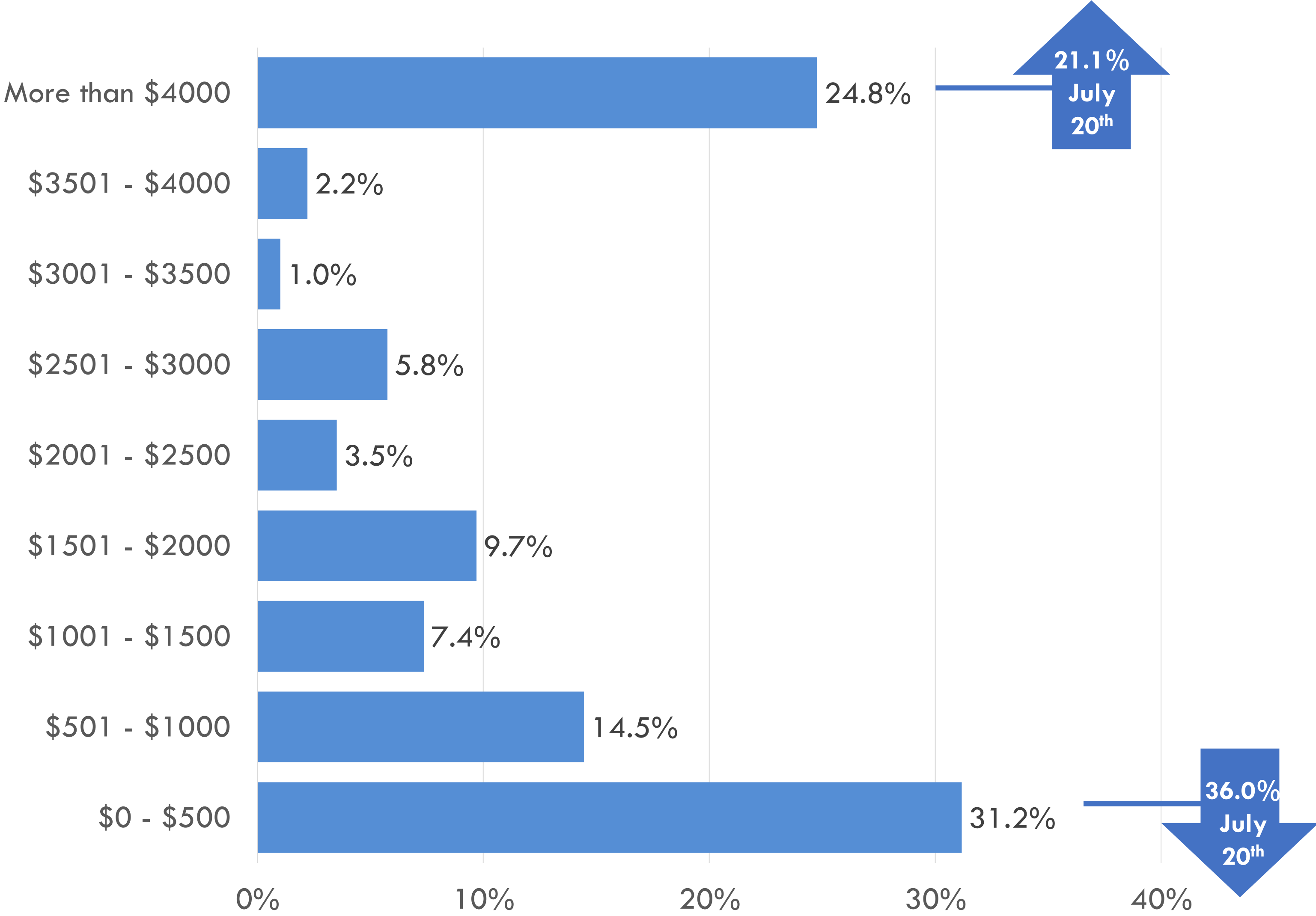


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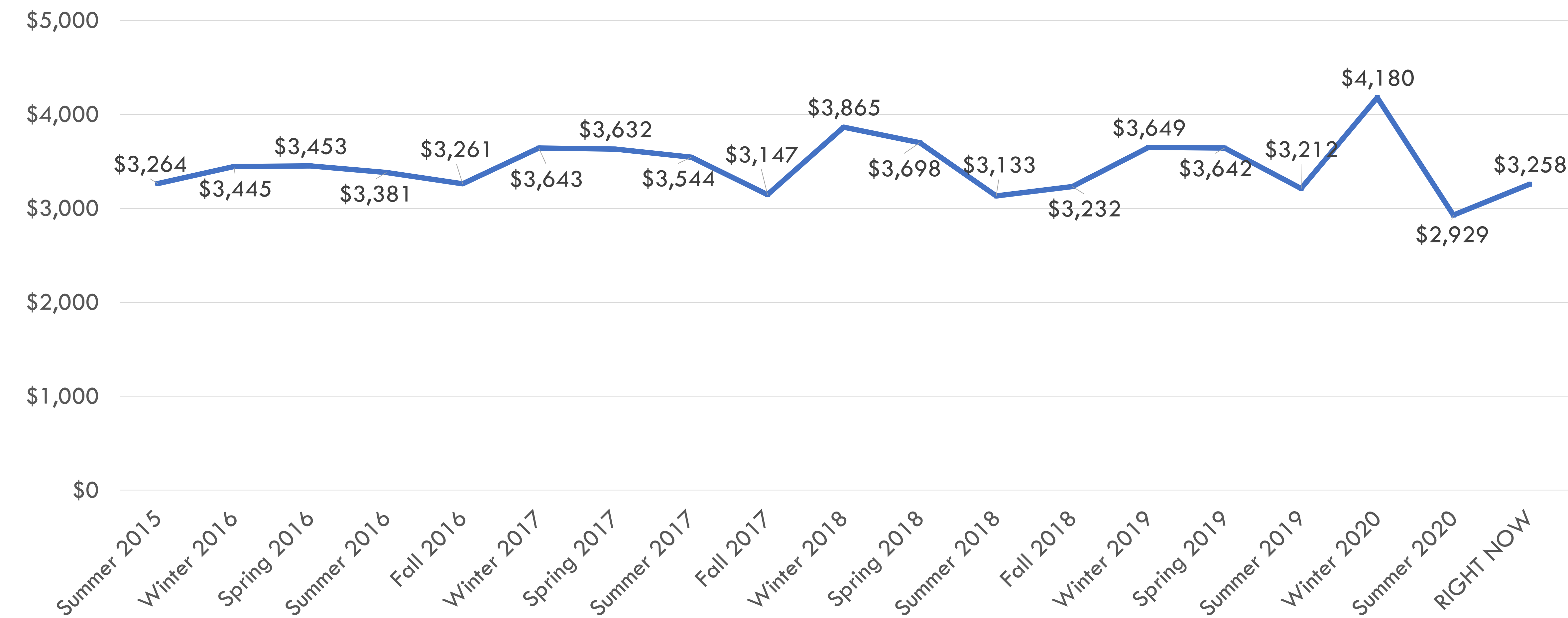
MAXIMUM LEISURE TRAVEL BUDGET

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

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



MAXIMUM LEISURE TRAVEL BUDGET (MEAN)



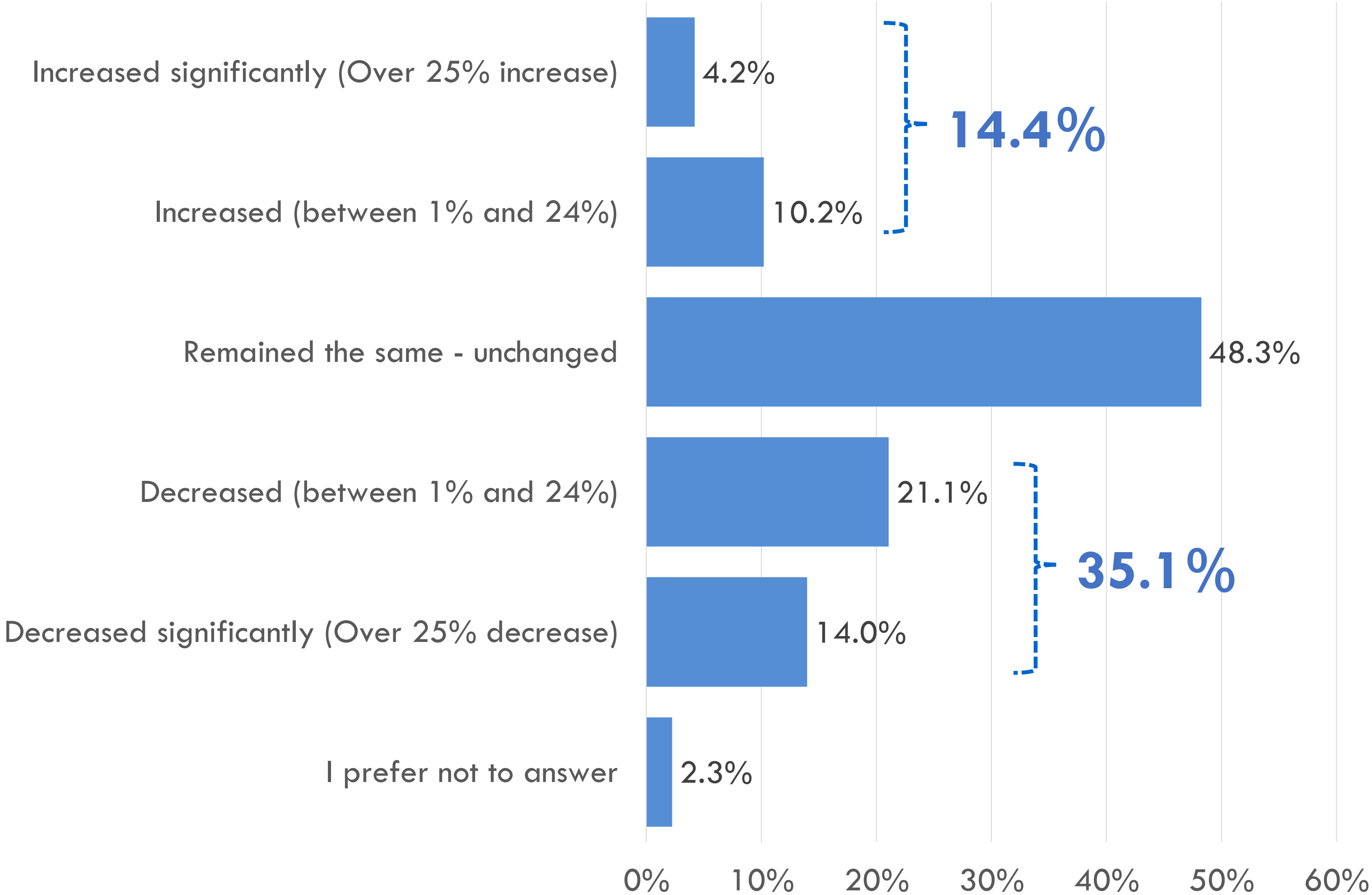
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

PANDEMIC'S IMPACT ON DISPOSABLE INCOME

Question: In what way (if any) has the Coronavirus situation impacted the amount of disposable income your household has to spend on travel? (Fill in the blank)

My household's disposable income available for travel has

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

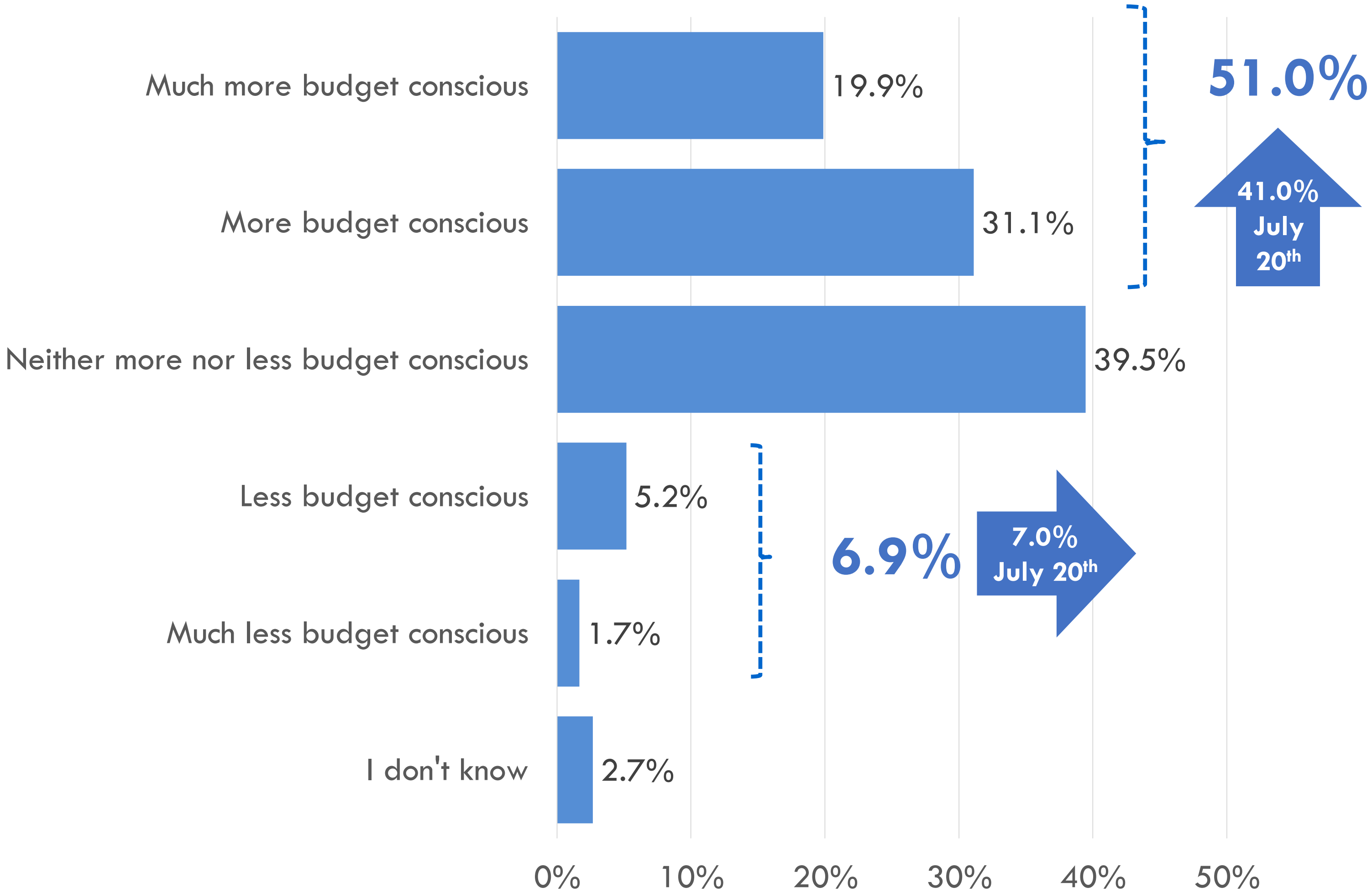


BUDGET CONSCIOUSNESS ON NEXT LEISURE TRIP

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

I will likely be _____

(Base: Wave 25 data. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



Key Takeaways

- Americans continue to demonstrate greater optimism about their travel future than the historic lows seen in the beginning of the pandemic—at least nearing Great Recession levels of sentiment, rather than below it
- A majority of American travelers say the pandemic has not negatively impacted the disposable income they have available for travel, and reported annual budgets for leisure travel have increased
- Nevertheless, American travelers plan on being more budget conscious on their trips now than they were prior to the pandemic





Coronavirus Travel Sentiment Index

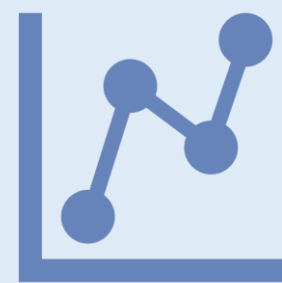
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 31st

What is a Predictive Index?



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



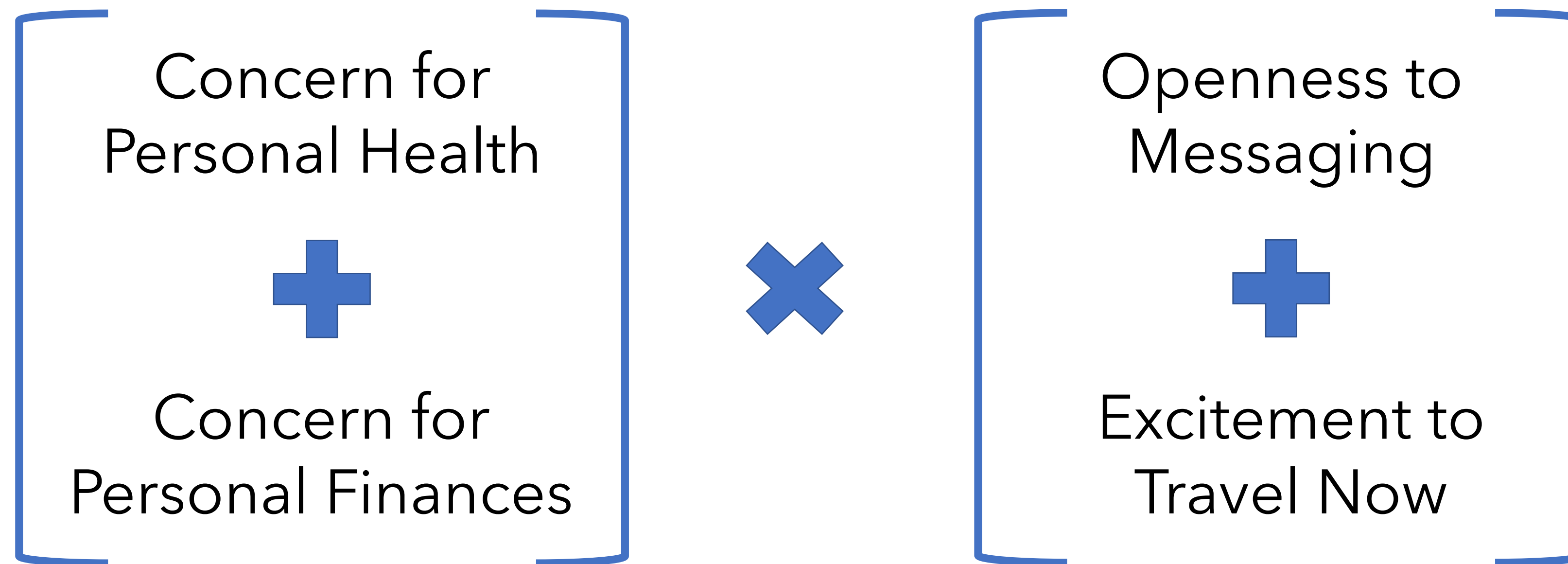
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

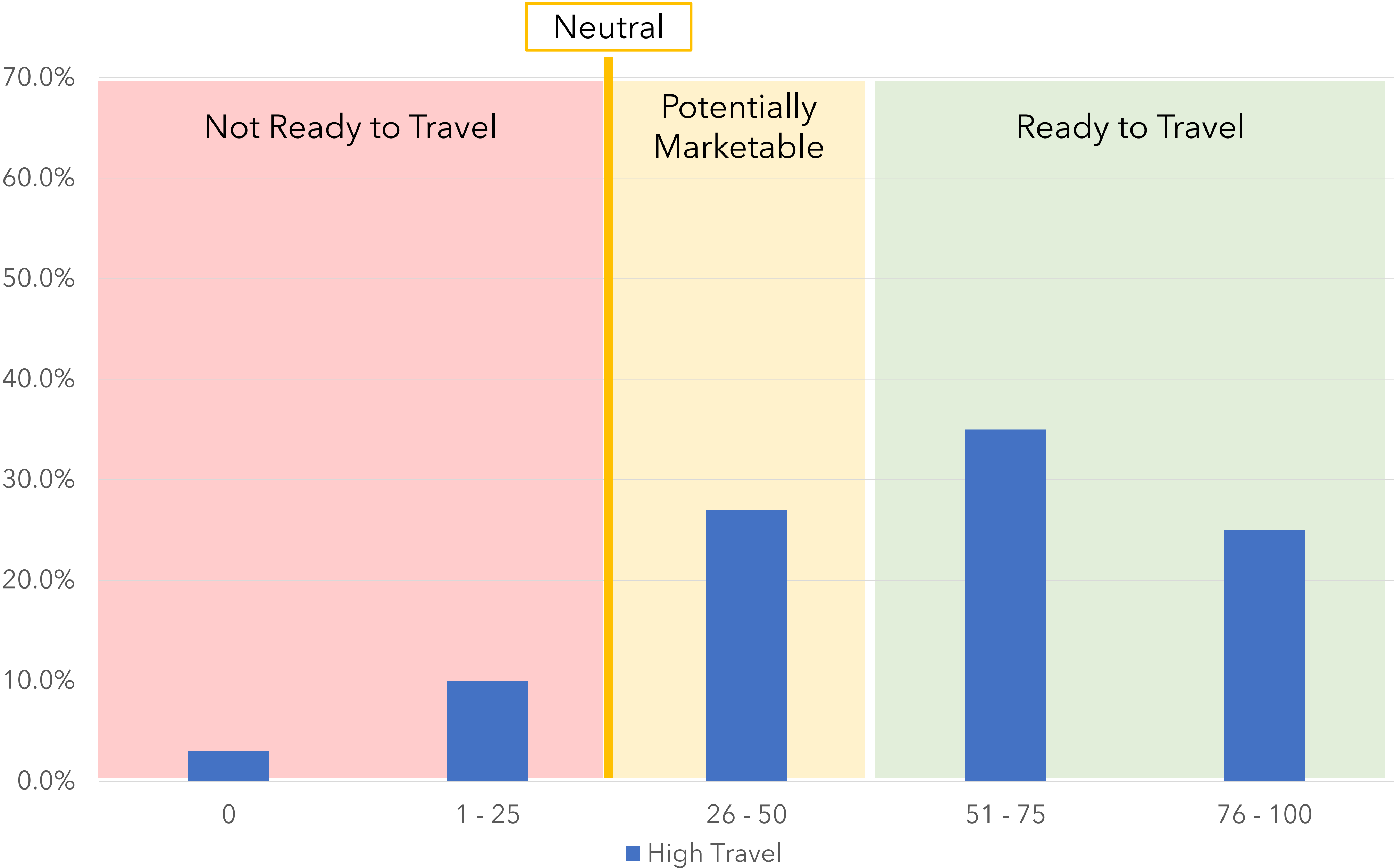
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

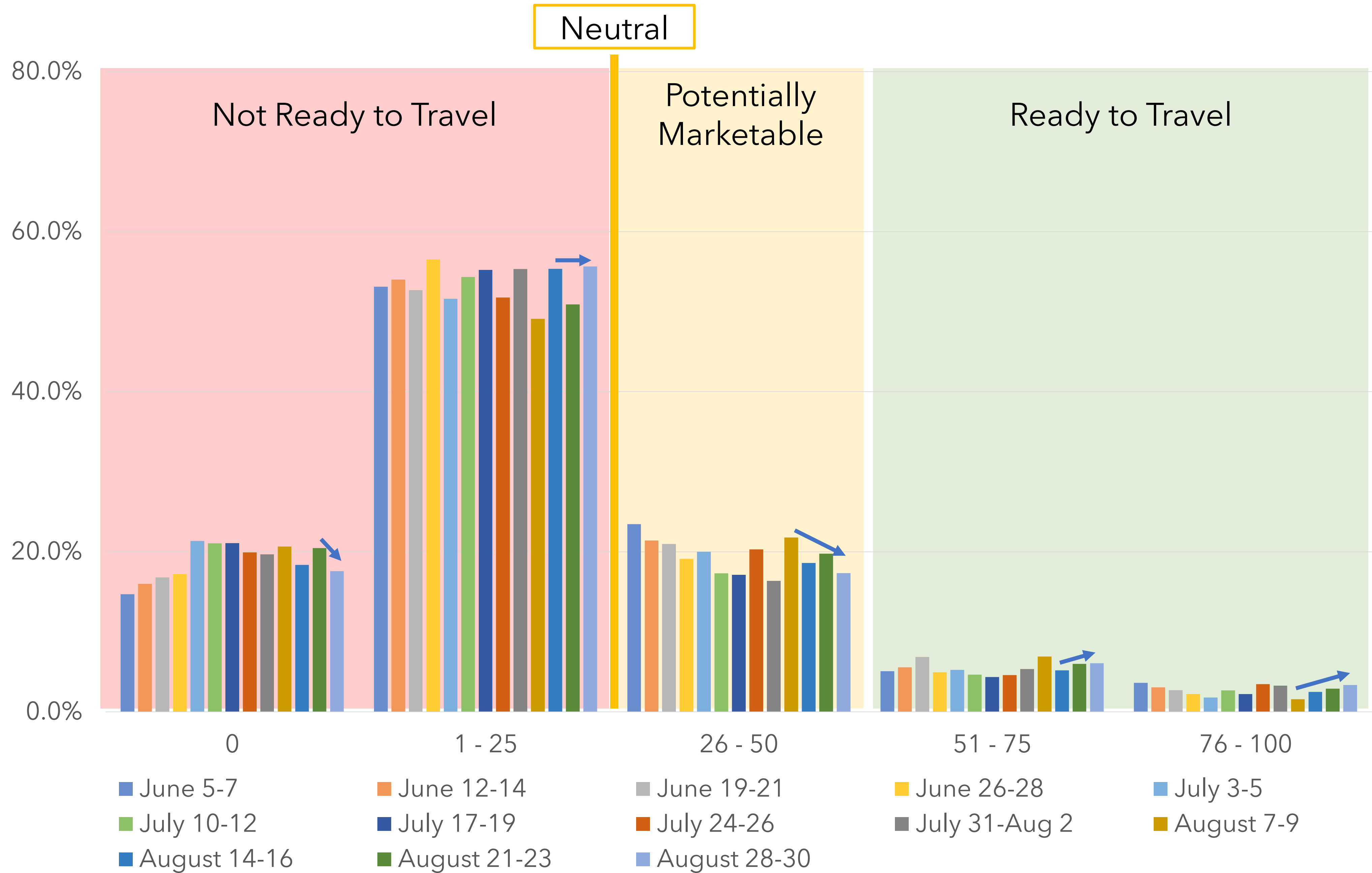


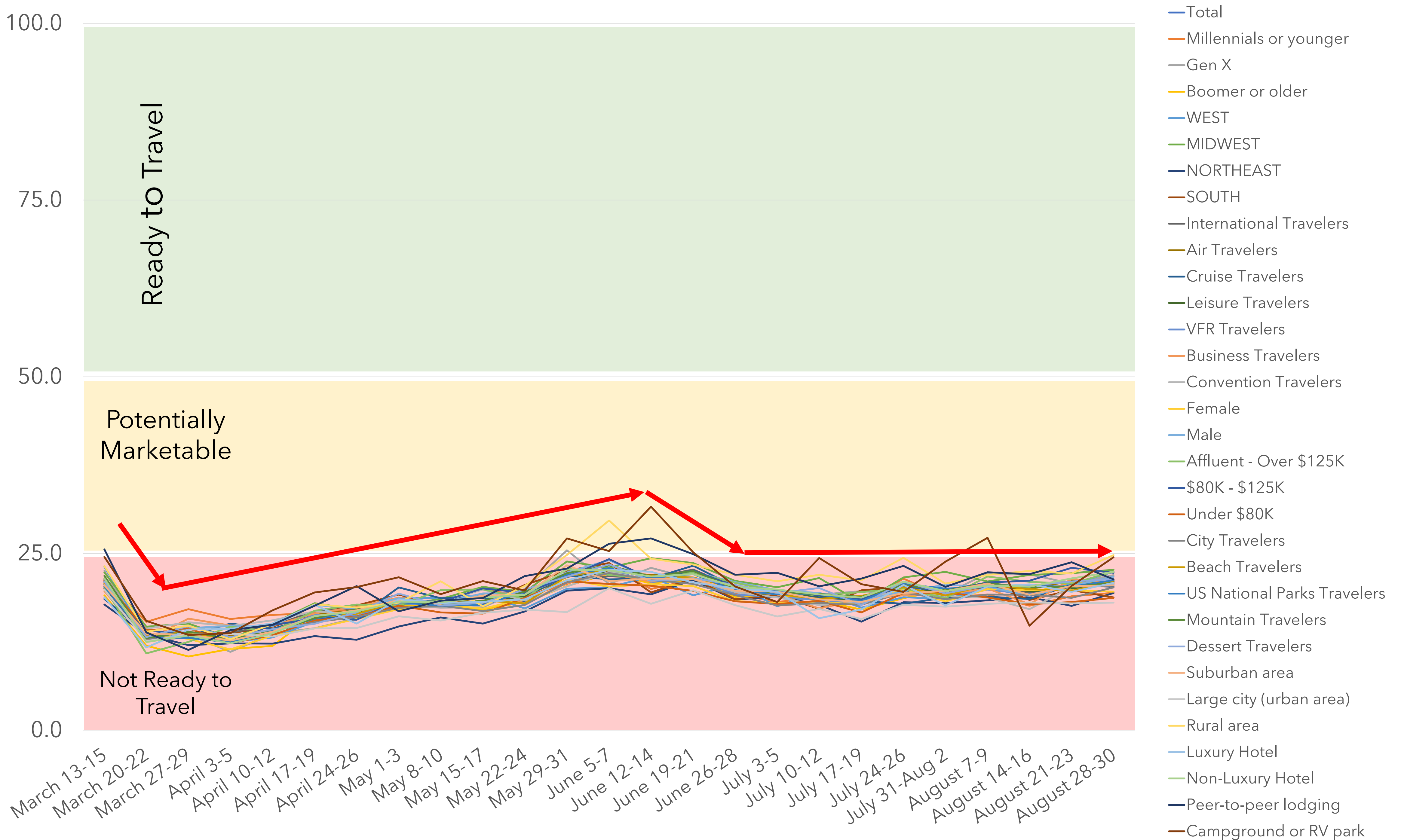
*Normalized to a 100pt scale

Healthy Travel Outlook



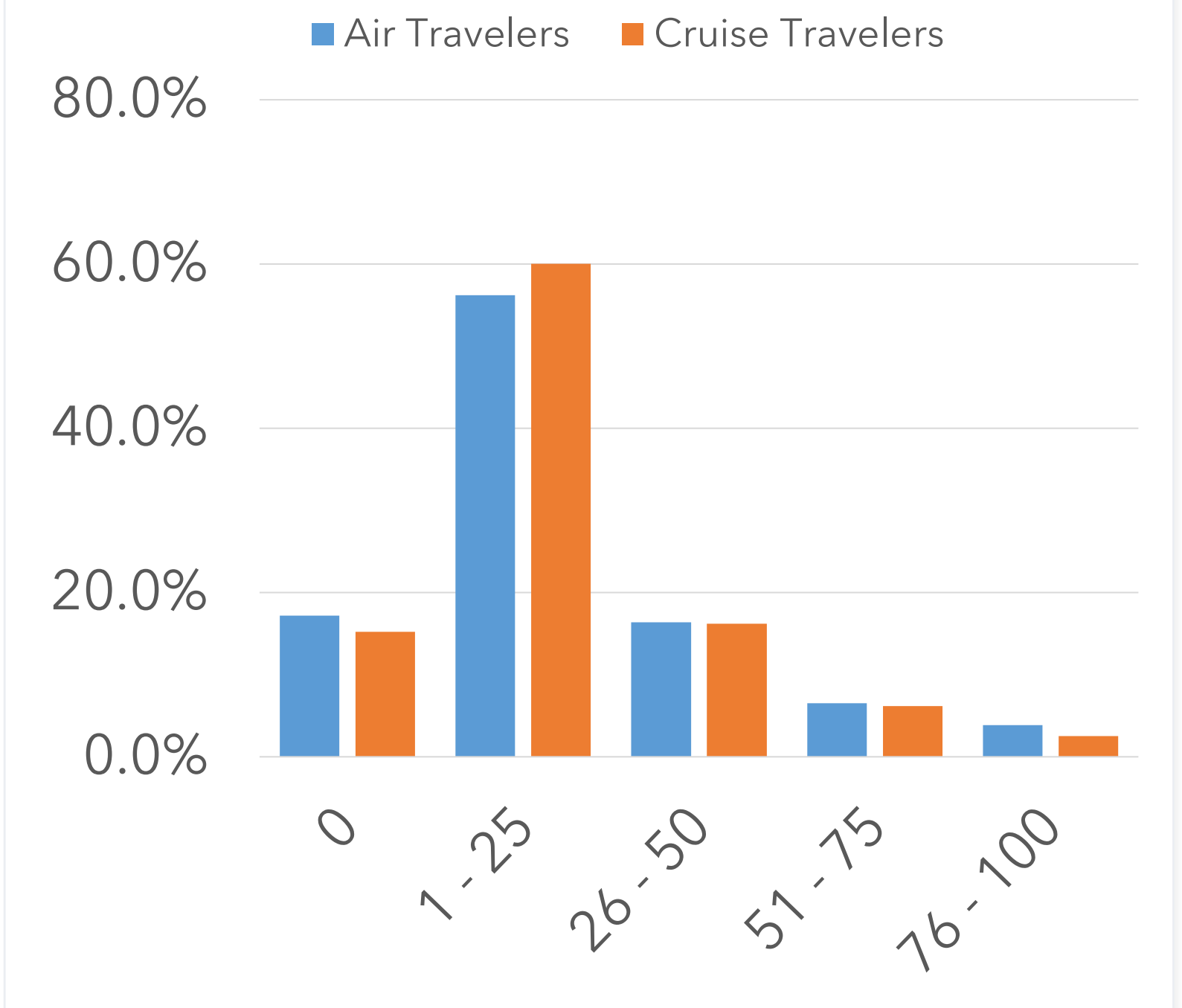
Travel Outlook



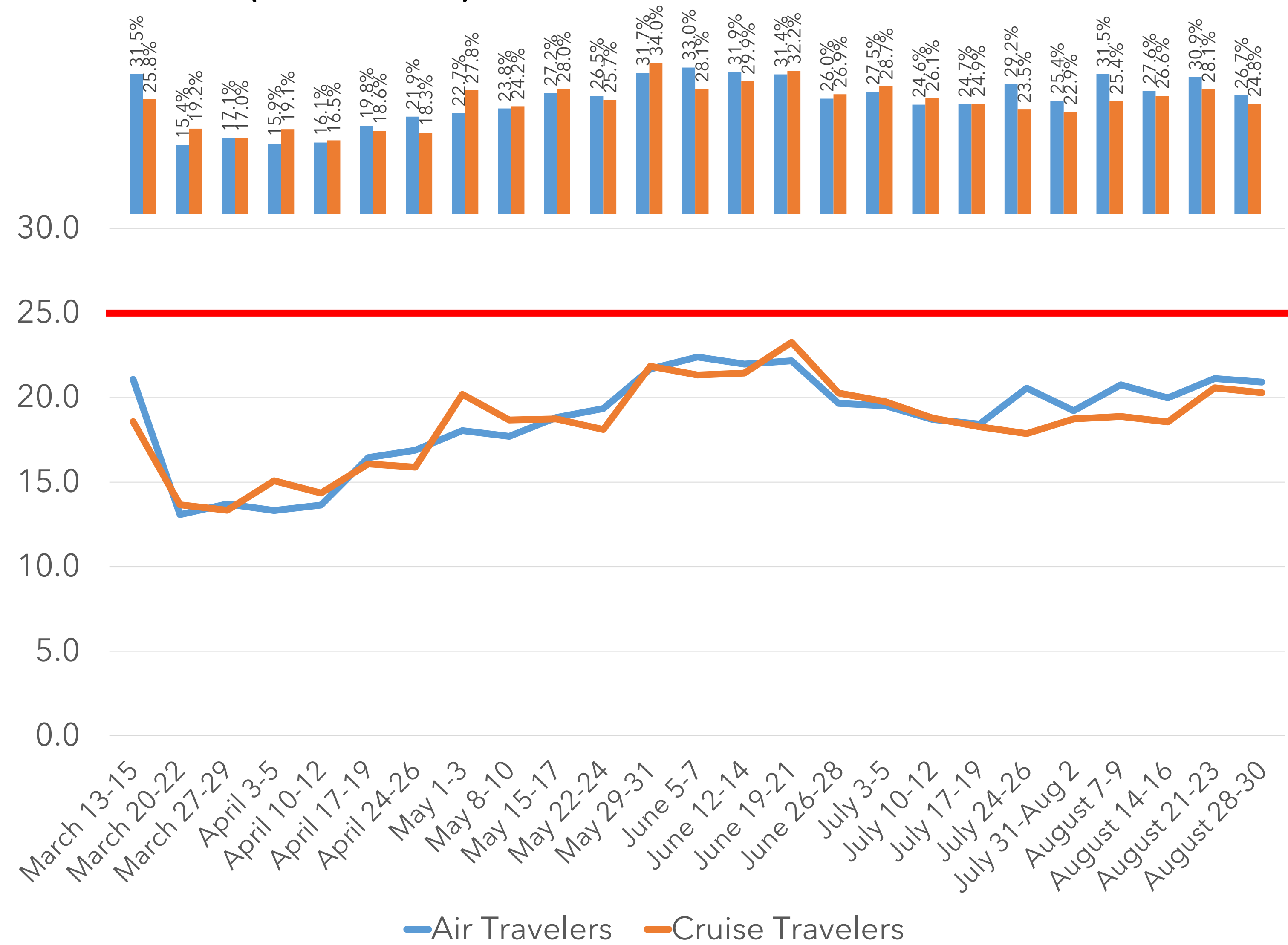


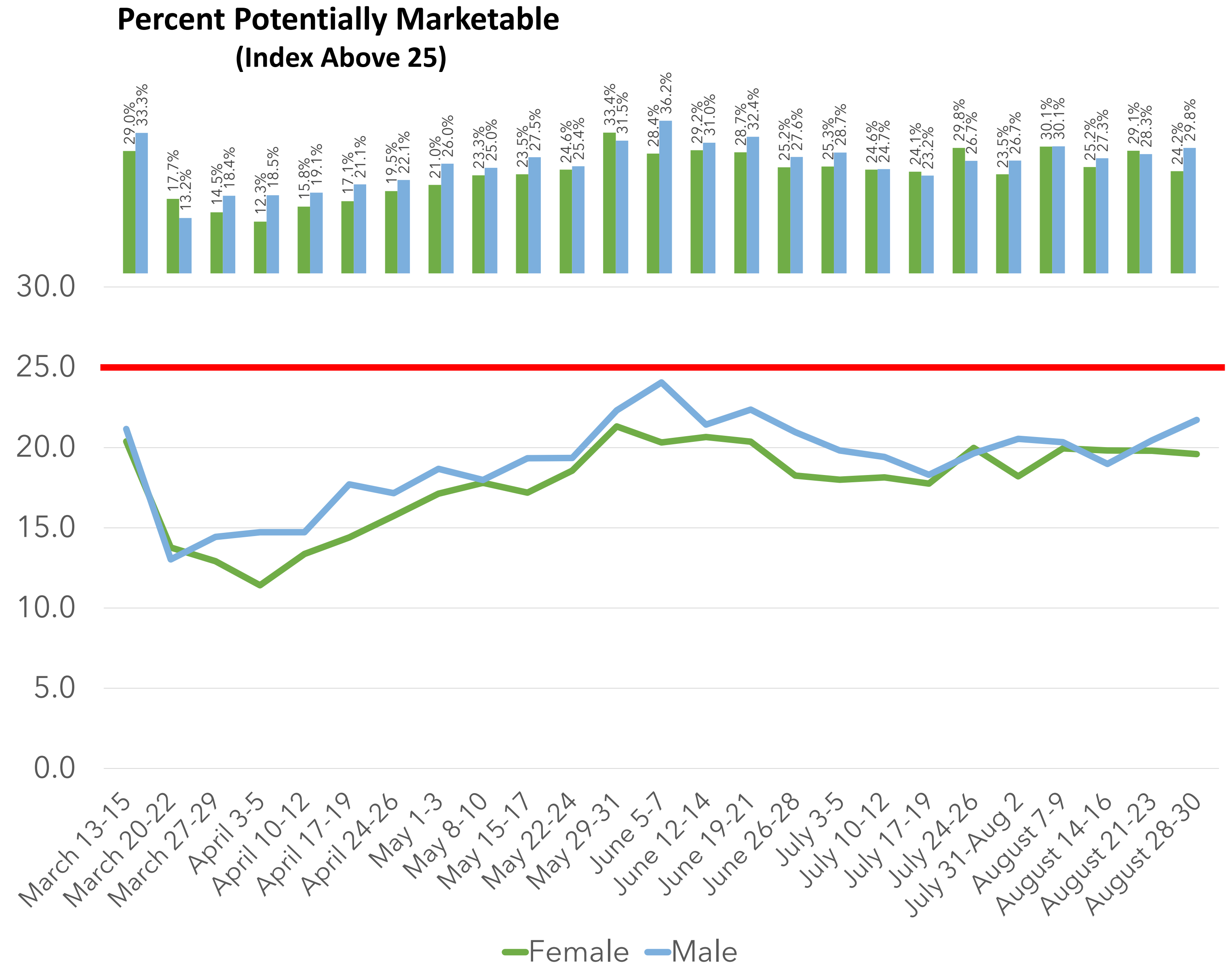
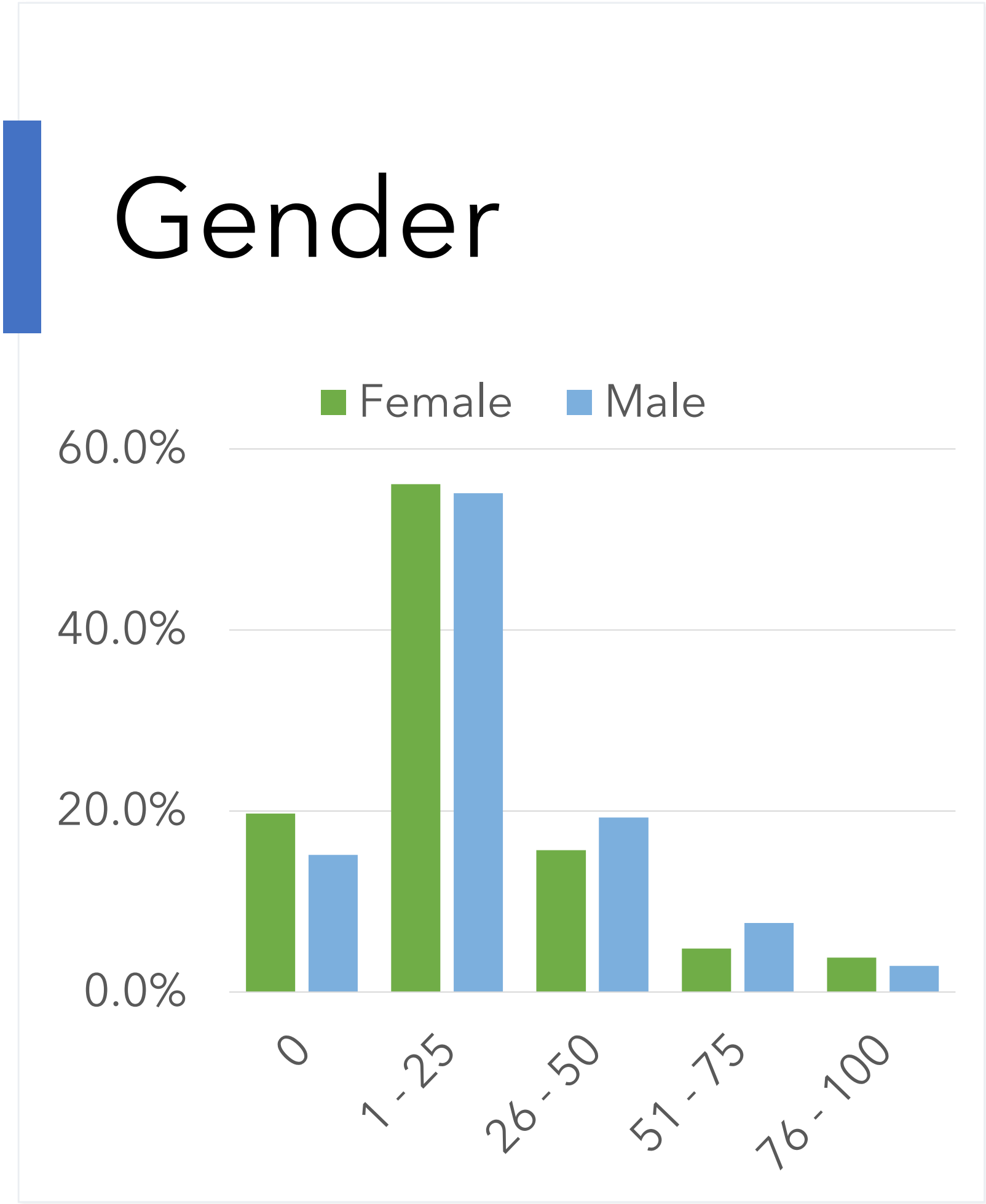


Airline and Cruise Travelers

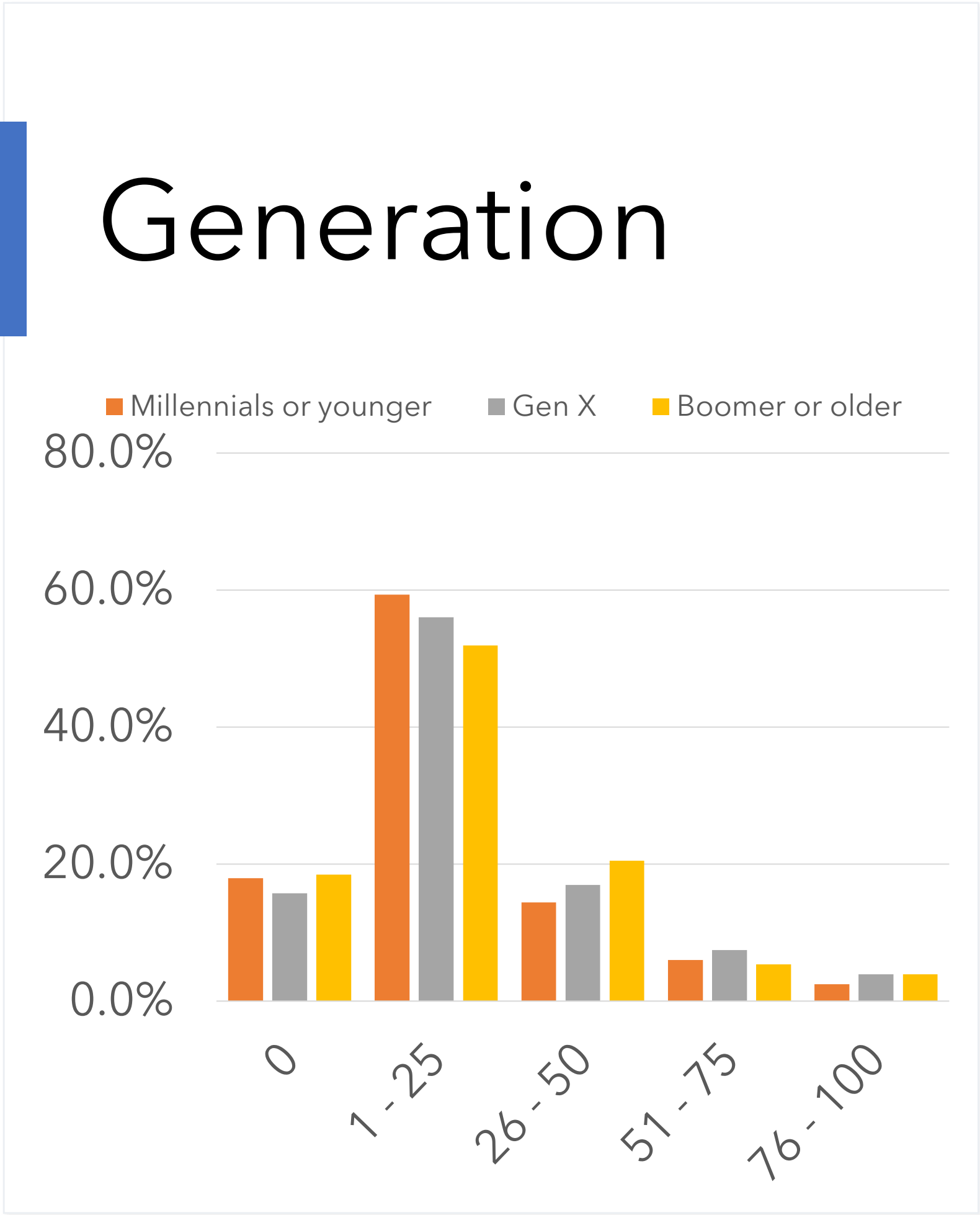


Percent Potentially Marketable
(Index Above 25)

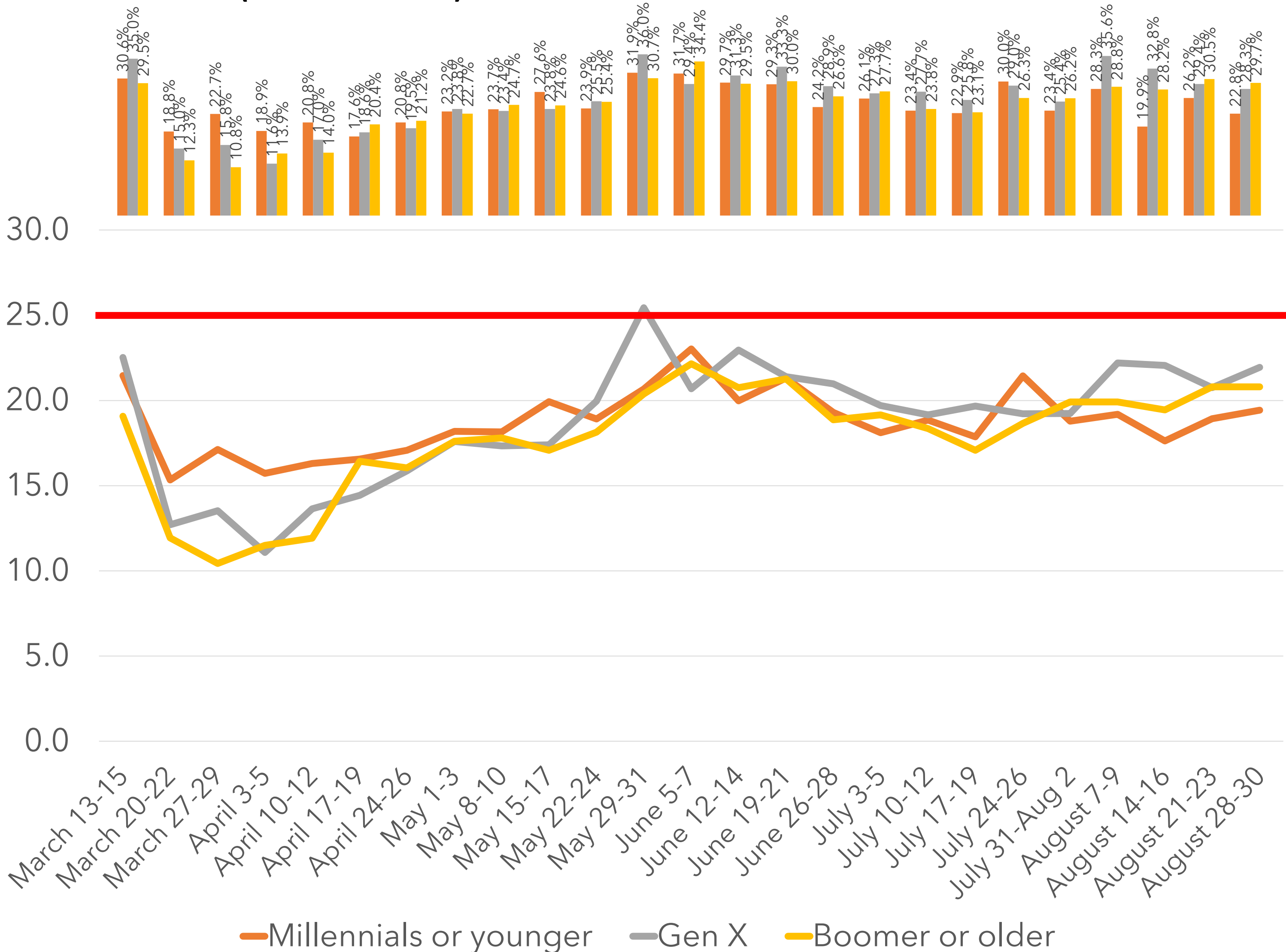




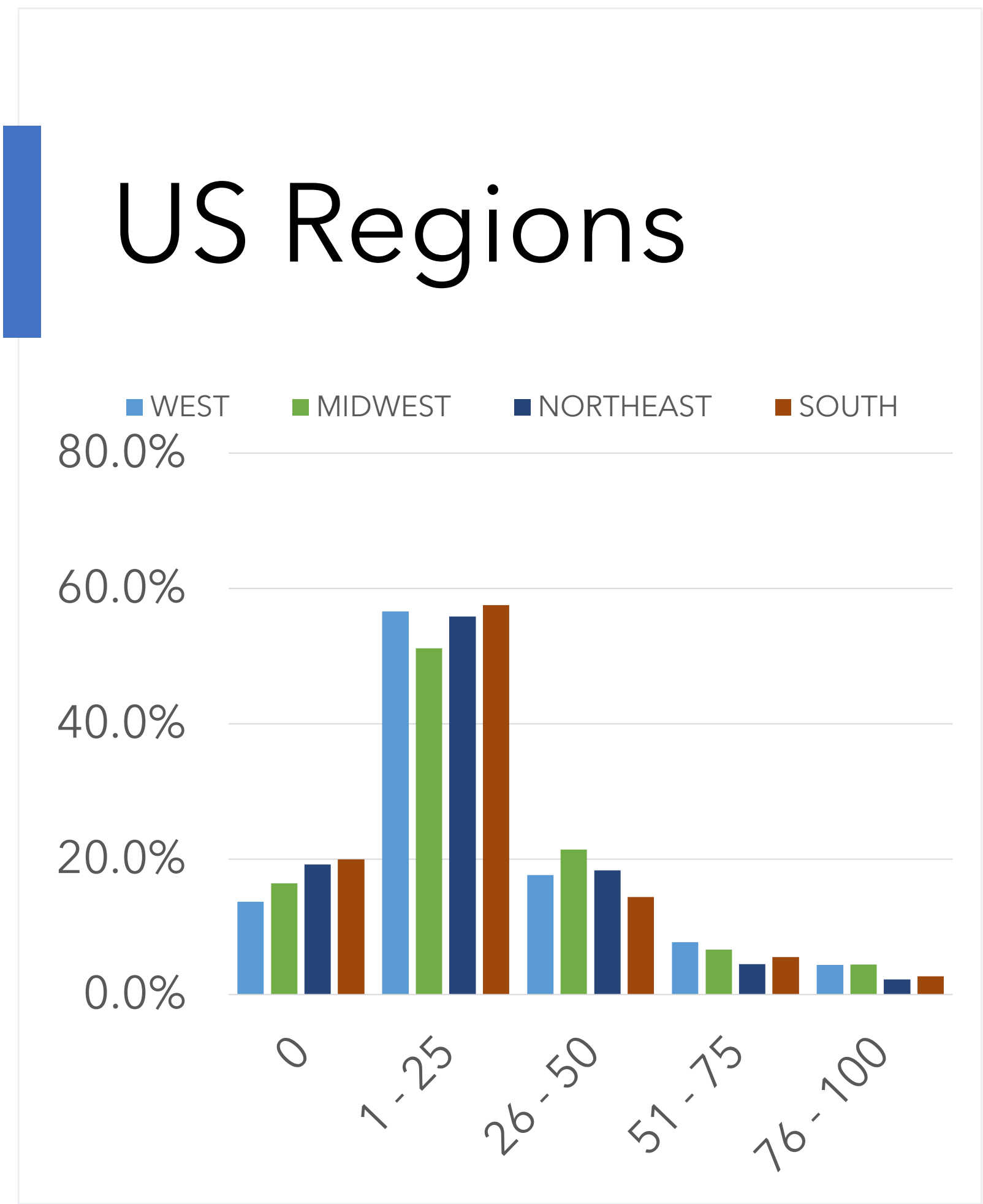
Generation



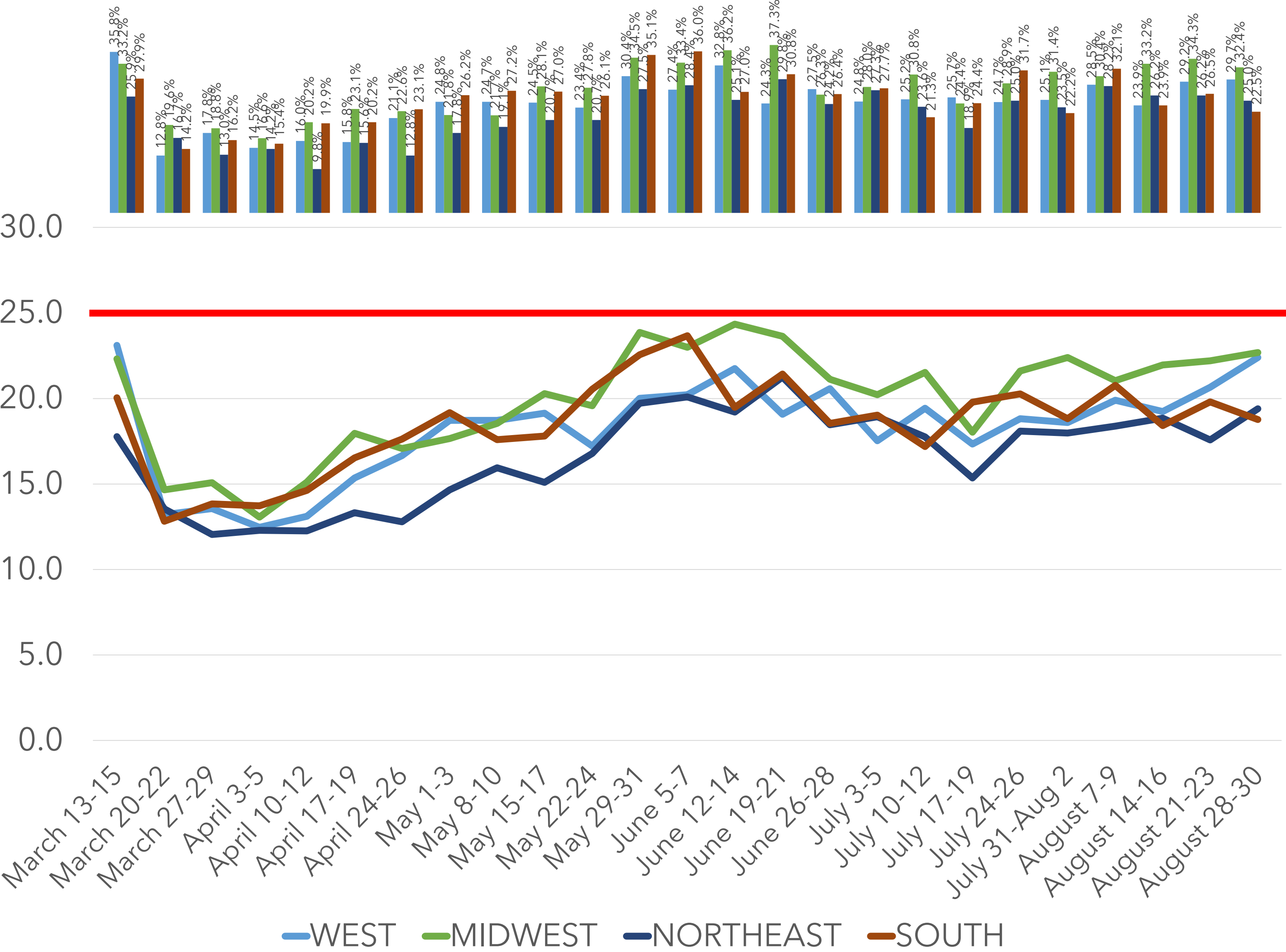
Percent Potentially Marketable (Index Above 25)



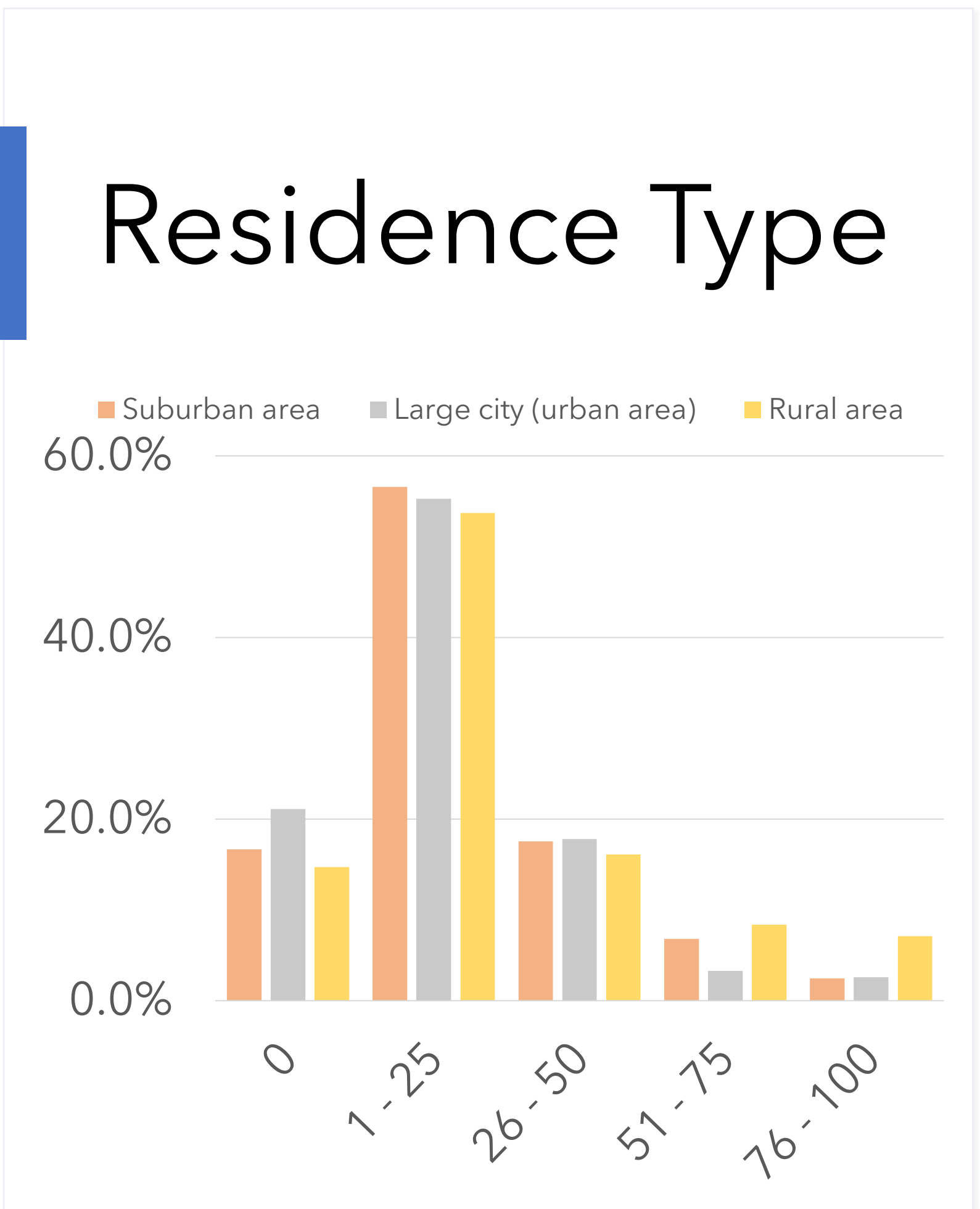
US Regions



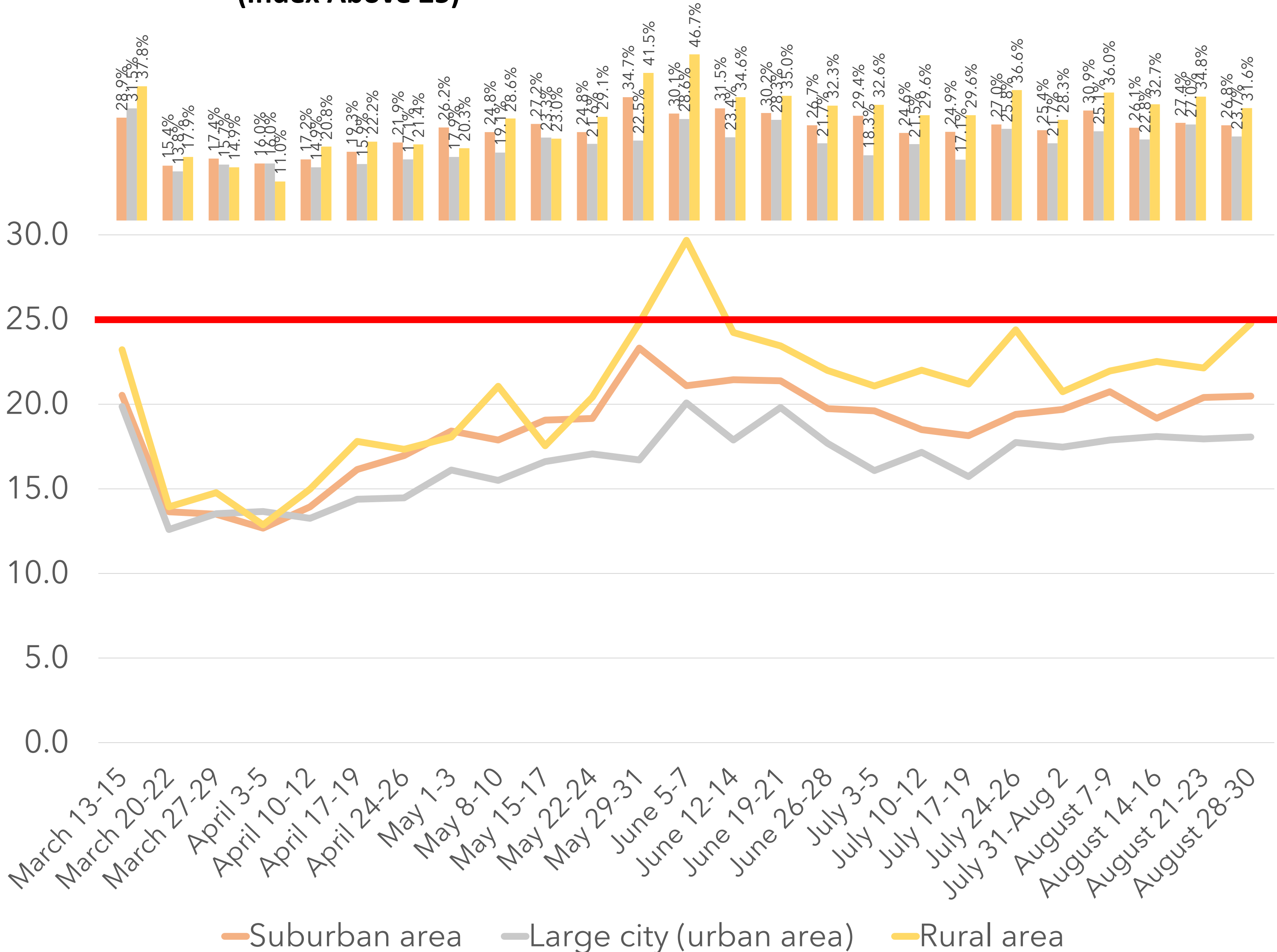
Percent Potentially Marketable (Index Above 25)



Residence Type

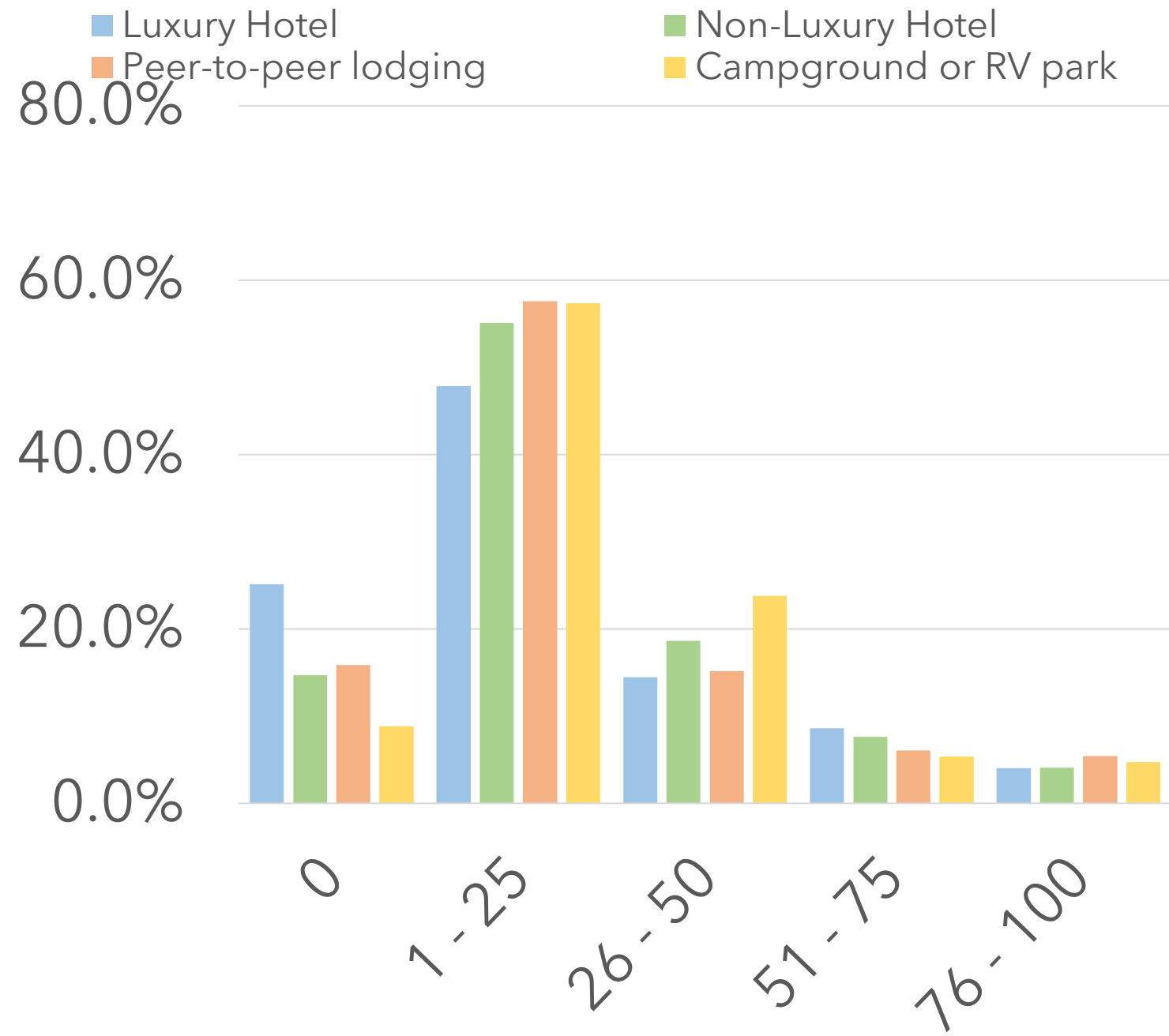


Percent Potentially Marketable (Index Above 25)

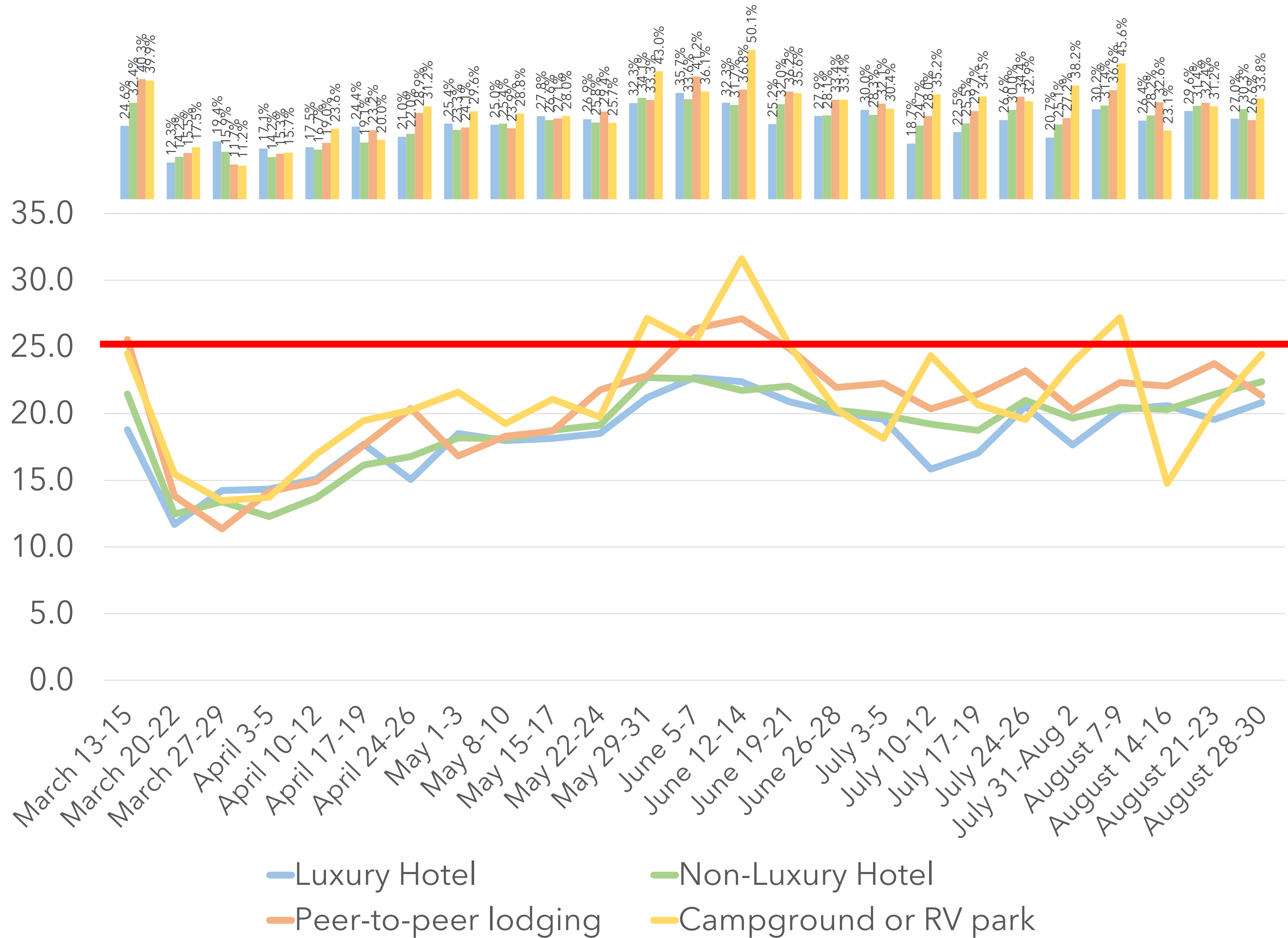


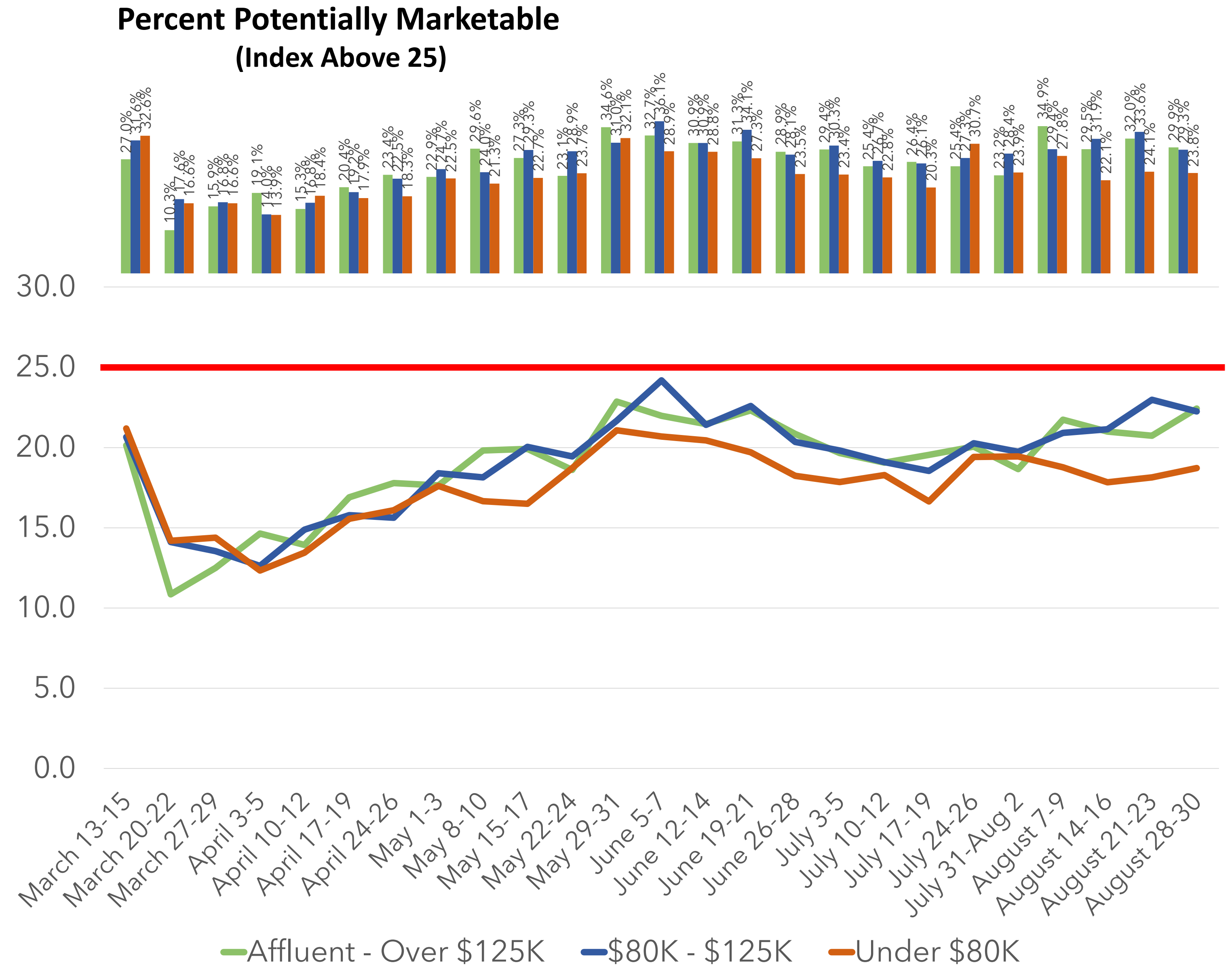
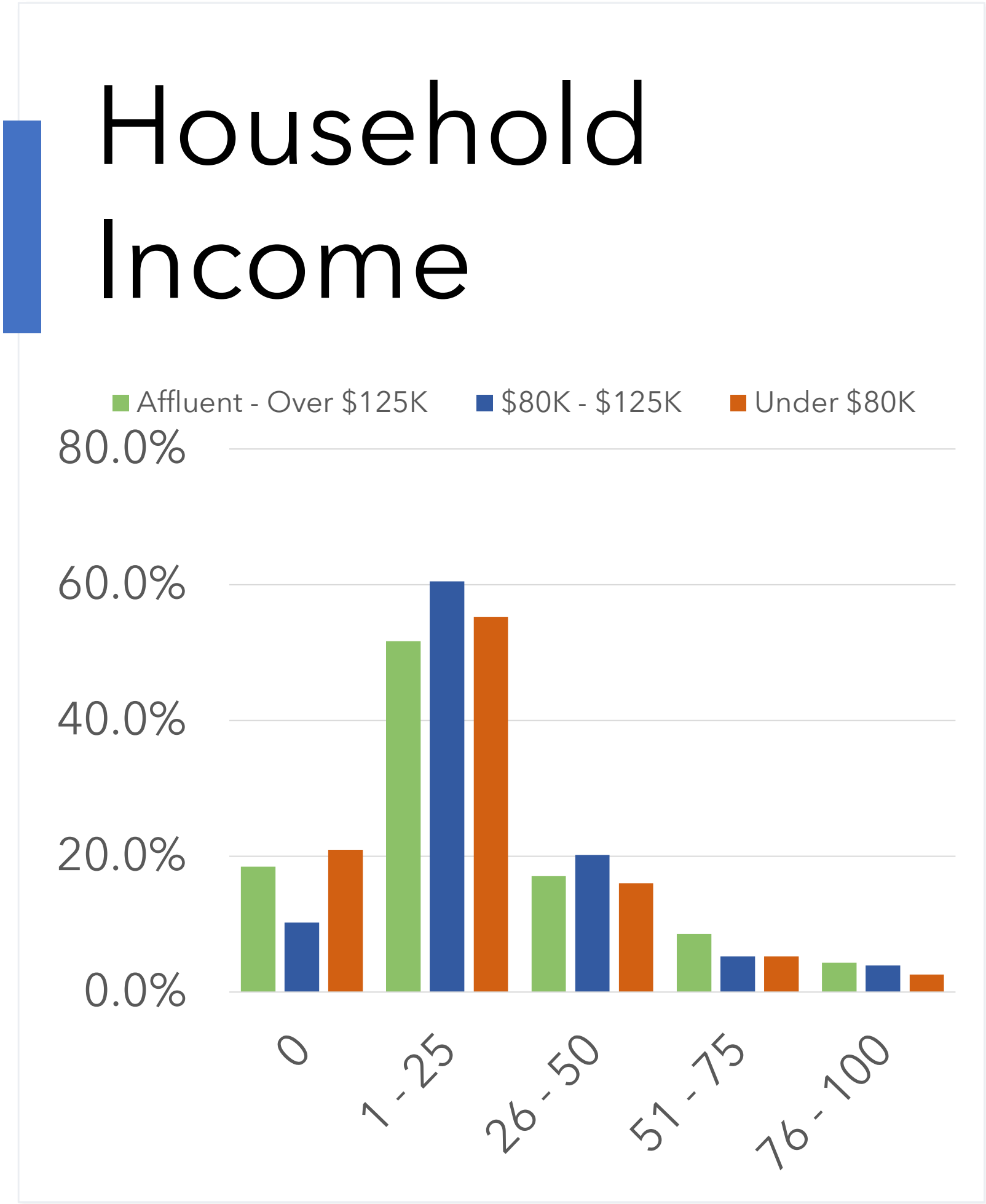


Lodging Preference



Percent Potentially Marketable (Index Above 25)





Next/Ongoing Updates

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



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

Send suggestions or requests for questions to:

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

15-minute presentations for your board and stakeholders

info@destinationanalysts.com





WEBINAR

WEDNESDAY, SEPTEMBER 2, 3PM ET

THE STATE OF THE AMERICAN TRAVELER

TRAVELER SEGMENTS
EDITION – IN AN AGE OF
COVID-19

Register at:
bit.ly/3fgggbEK

Destination  Analysts 

Resources for Tourism Advocacy & Recovery

destinationanalysts.com

ROI

THIS YEAR ▼ 32.8876
▲ 42.9841

First quarter
Jan-Mar

Second quarter
Apr-Jun

Third quarter
Jul-Sep



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

Research & Data Support for Grant Applications & Recovery Programs

info@destinationanalysts.com

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

**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars