

DESTINATION ANALYSTS'
CORONAVIRUS
TRAVEL SENTIMENT
INDEX REPORT

KEY FINDINGS—WEEK OF SEPTEMBER 20th, 2020

About Destination Analysts

Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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.

In addition to this report, Destination Analysts conducts ***The State of the American Traveler*** and ***The State of the International Traveler***—the travel industry’s premier studies for tracking traveler sentiment and global destination brand performance—as well as ***The CVB and the Future of the Meetings Industry*** annual study helping destination marketing organizations transform their meetings sales and services strategies.



IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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Key Findings for the Week of September 20th

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Americans who Feel a High Degree of Daily Stress

Currently, 47% of American travelers feel a high degree of stress in their daily lives. Be it from managing distance learning for children to navigating extreme weather, Americans are a little likelier to be keeping themselves up at night and feeling tired than they were a few months ago. While stress is up, the propensity to worry about coronavirus, however, is down.

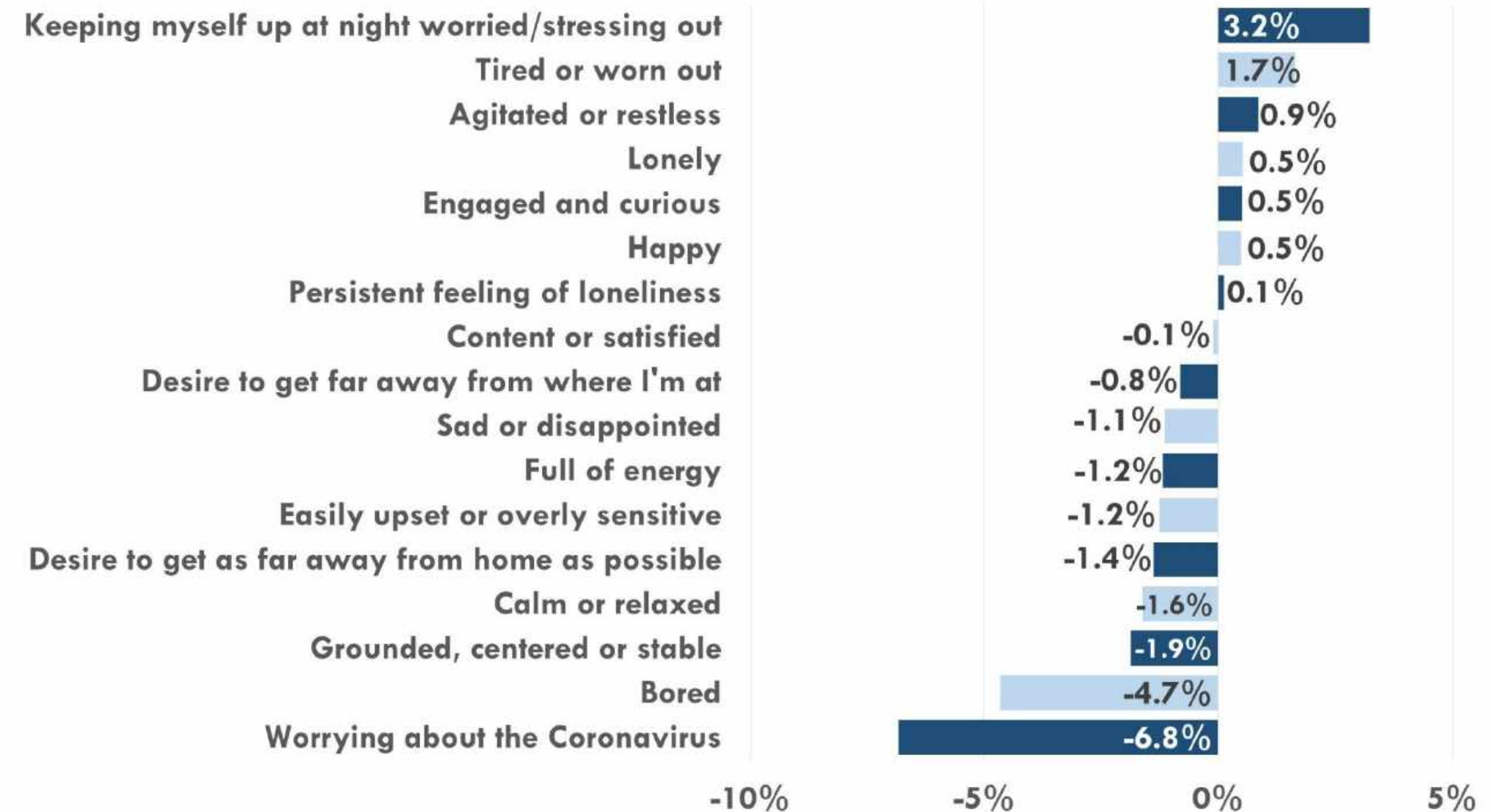
Question: Please tell us about how you have been feeling DURING THE LAST MONTH. Using the scale below, tell us how often you feel each.

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

AMERICANS WHO FEEL A HIGH DEGREE OF DAILY STRESS



RECENT FEELINGS: ABSOLUTE CHANGE FROM JULY 2020



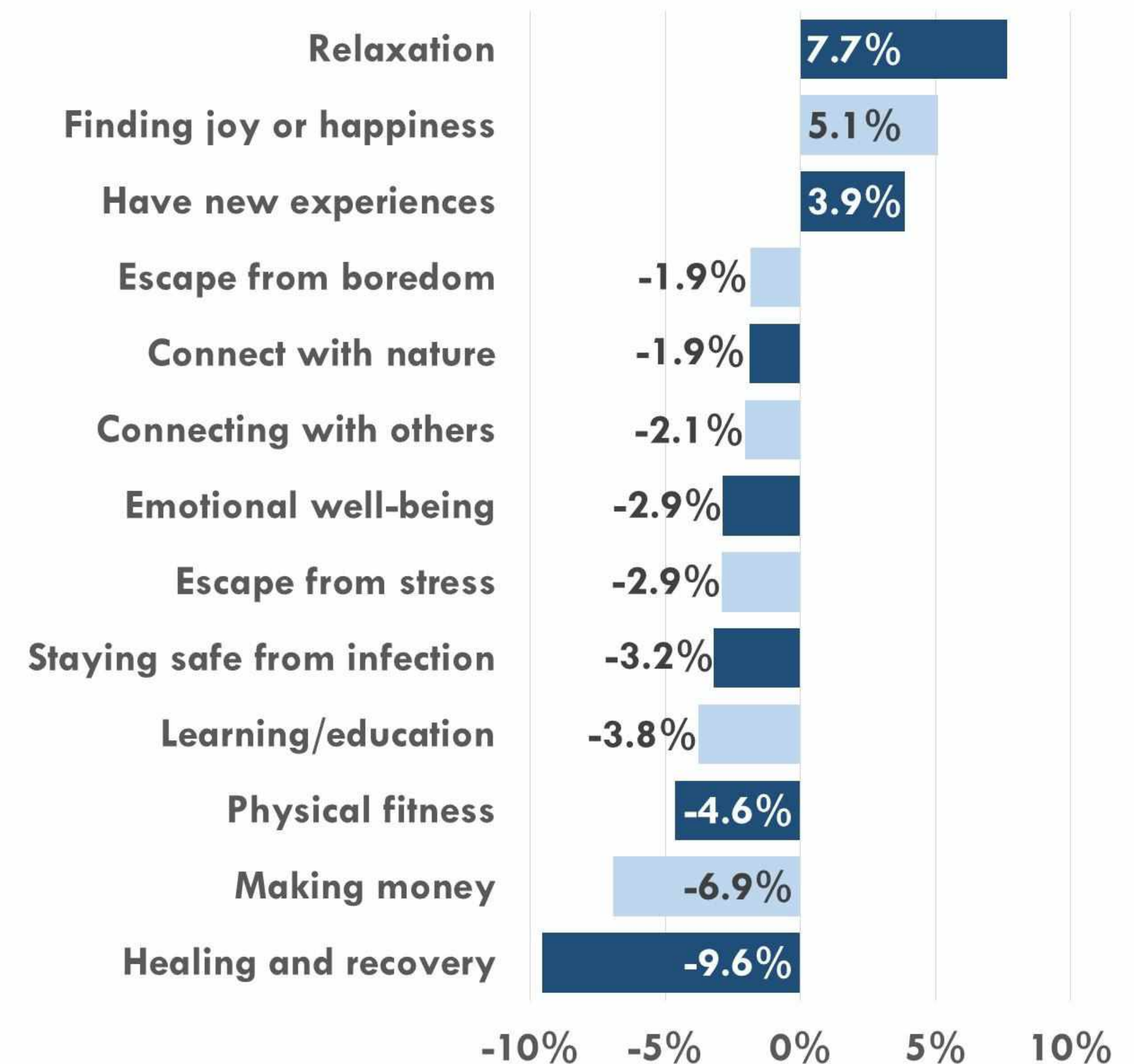
Shifts in Lifestyle Priorities

Since April, and amidst rising stress, more Americans are reporting stronger prioritization of relaxation, finding joy/happiness, and—especially important for travel—having new experiences. Whether GenZ, Millennial, GenX or Baby Boomer, the generations are all in agreement on the prioritization of emotional well being, in addition to relaxation and finding joy/happiness. While staying safe from infection is also a top lifestyle priority across the board, it has nevertheless declined, most notably for Boomers, who have instead increased their focus on relaxation. Among Millennial and younger age travelers, escaping from stress and connecting with others are not quite as strongly priorities as was felt in August, instead returning back to May levels. GenX-age travelers are the likeliest to be prioritizing connecting with nature as they look out over the next six months of their lives.

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

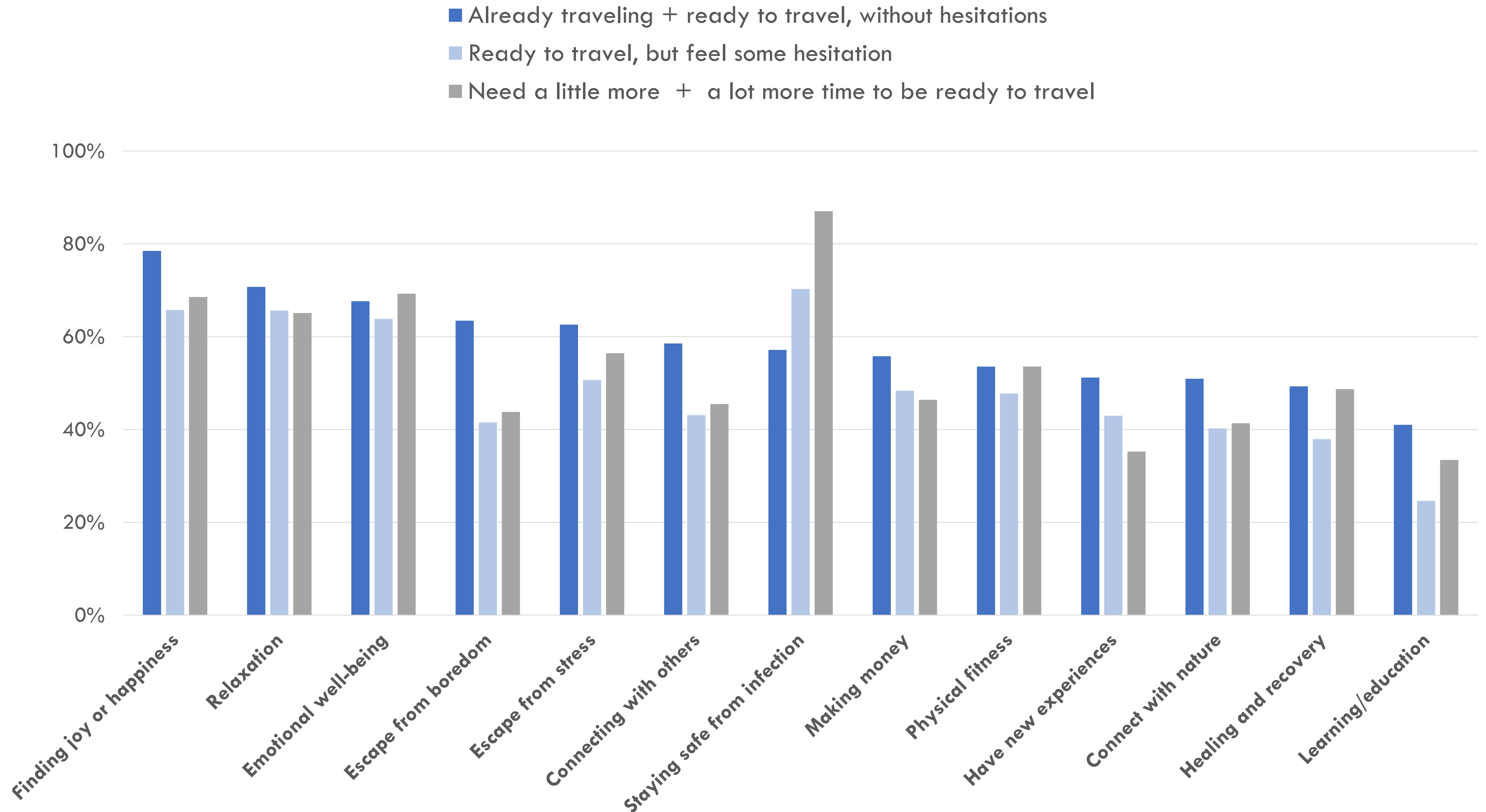
(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)

SHIFTS IN LIFESTYLE PRIORITIES: ABSOLUTE CHANGE FROM APRIL 2020



Lifestyle Priorities by Travel State-of-Mind

Perhaps of most importance, those who are already traveling (or ready to without hesitation) are far likelier to be prioritizing finding joy and escaping from boredom compared to other Americans.



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

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

Openness to Travel Inspiration

With these patterns in both continued and shifting lifestyle priorities, openness to travel continues to bloom. As has been for the last month, over 54% of Americans identify with being in a “ready to travel” mindset versus needing more time. American travelers’ level of excitement for learning about new travel experiences or destinations to visit is at a pandemic-period high—one last (and only other time) obtained at the end of May, at the start of the summer season.

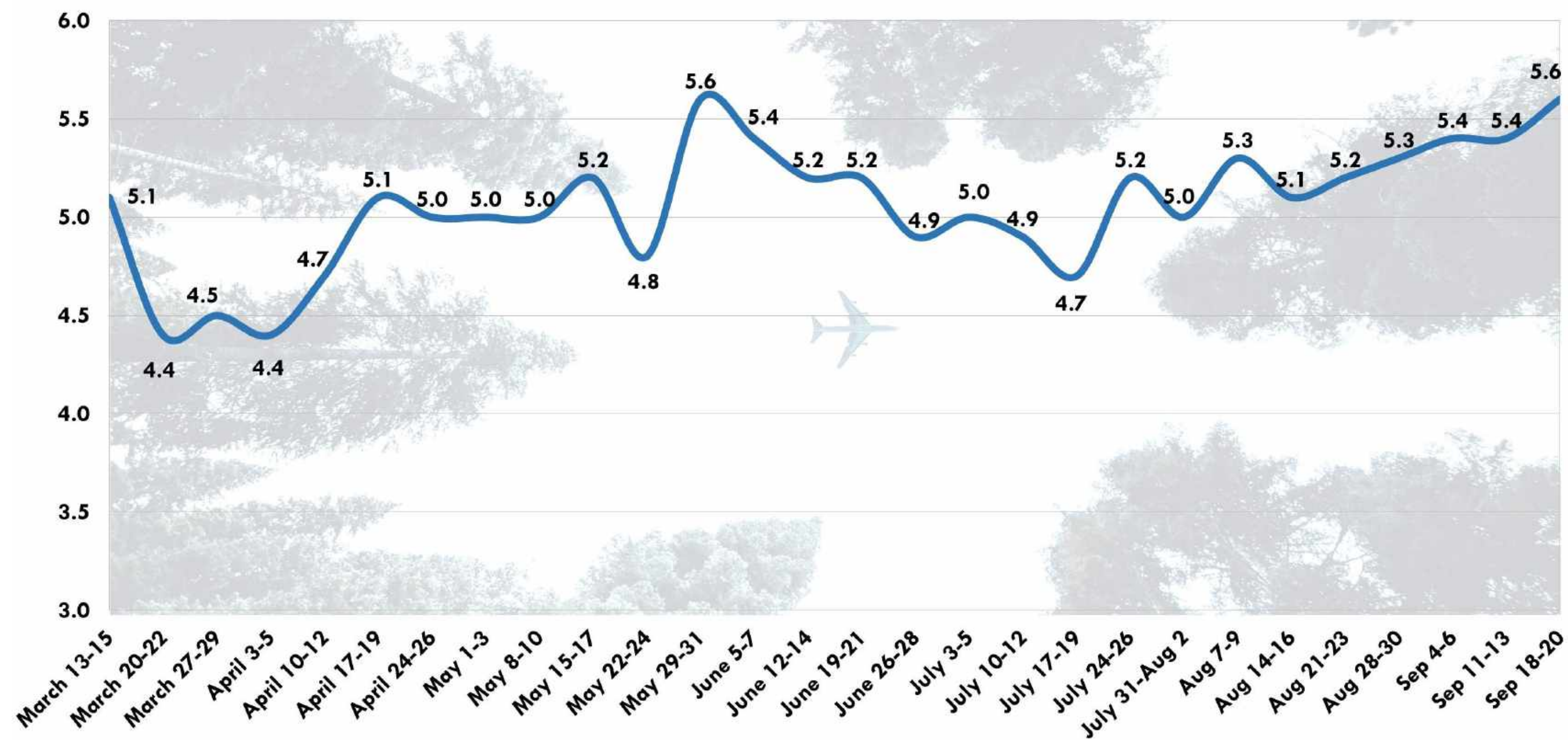
Question: At this moment, how interested are you in learning about new, exciting travel experiences or destinations to visit?

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

OPENNESS TO TRAVEL INSPIRATION MARCH – SEPTEMBER



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



Won't Travel Without a Vaccine

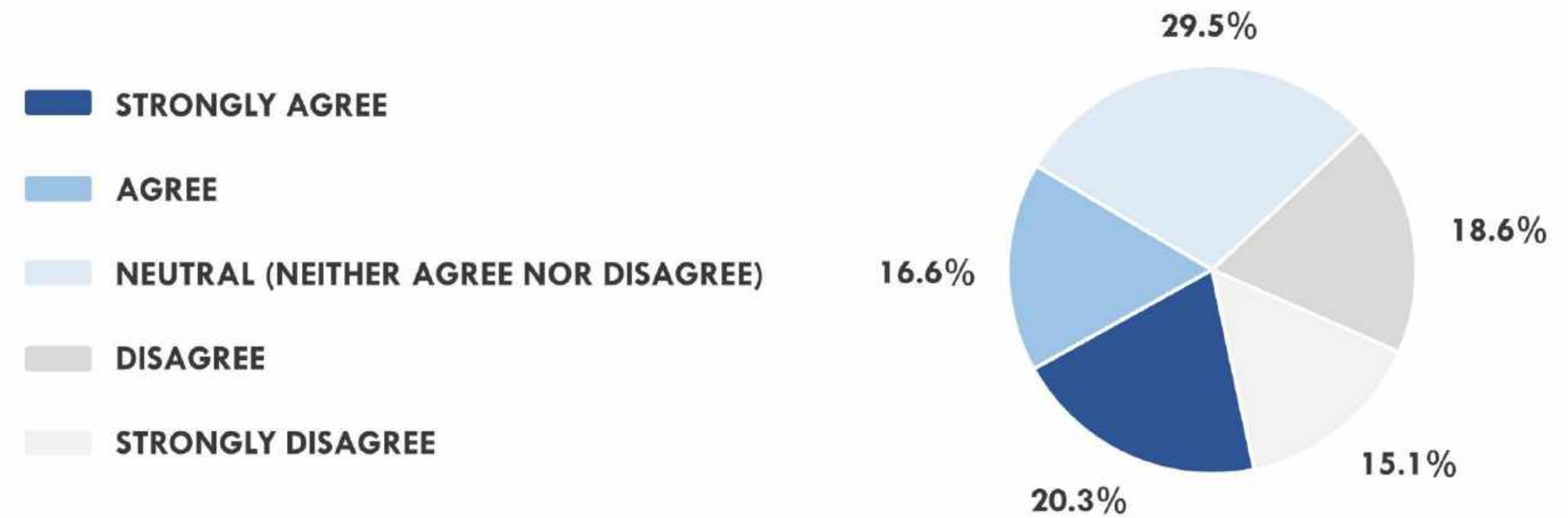
Unlike early on in the pandemic, now less than 50% of American travelers consider staying in a hotel, Airbnb or home rental, dining in a restaurant, visiting an amusement park or other outdoor attraction, recreating outdoors and shopping to be unsafe. Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic. Over half of American travelers continue to say they are at least somewhat confident they can travel safely in this environment.

Now just 37% agree they need a vaccine to travel, down from a high of 45% at the start of August.

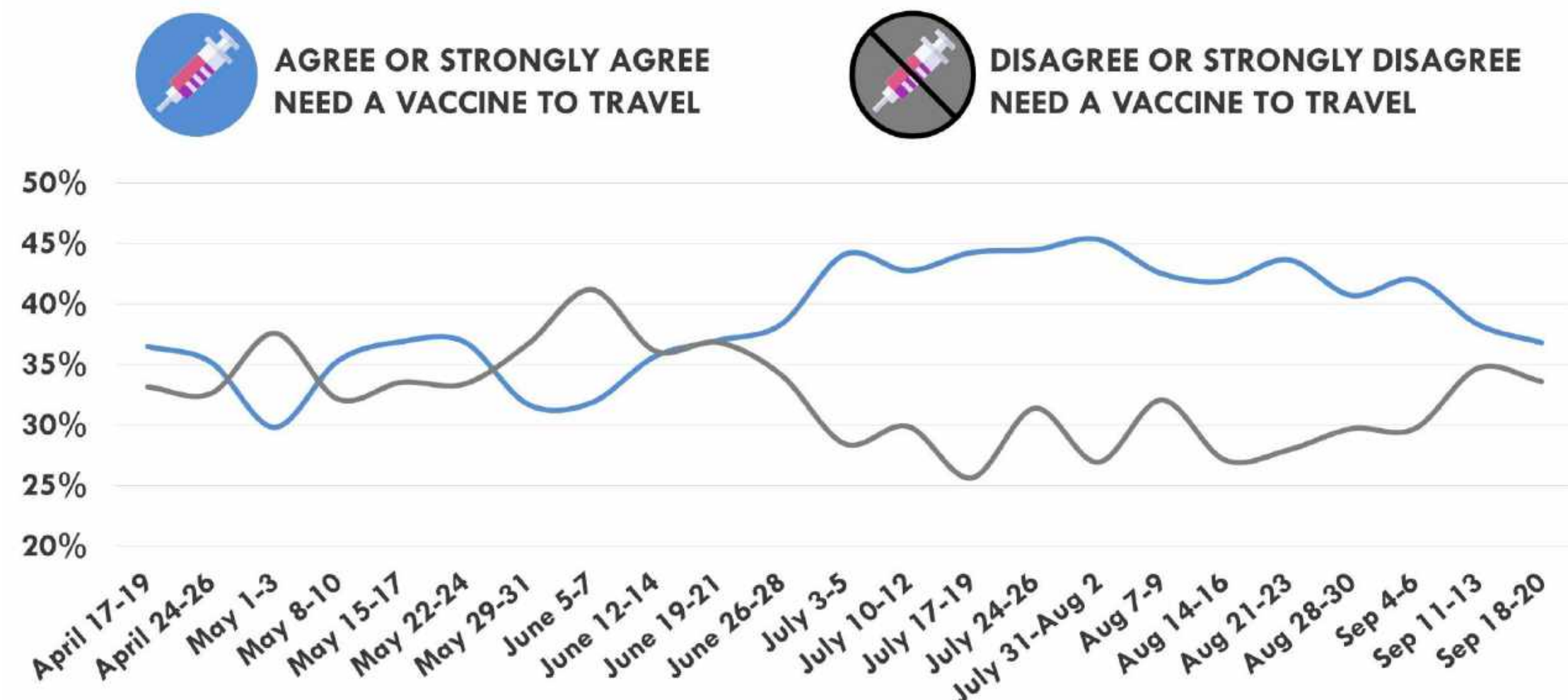
Question: How much do you agree with the following statement?
Statement: I'm not traveling until there is a vaccine.

(Base: Waves 6-28. 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 and 1,200 completed surveys.)

WON'T TRAVEL WITHOUT A VACCINE AS OF SEPTEMBER 20TH



HISTORICAL DATA



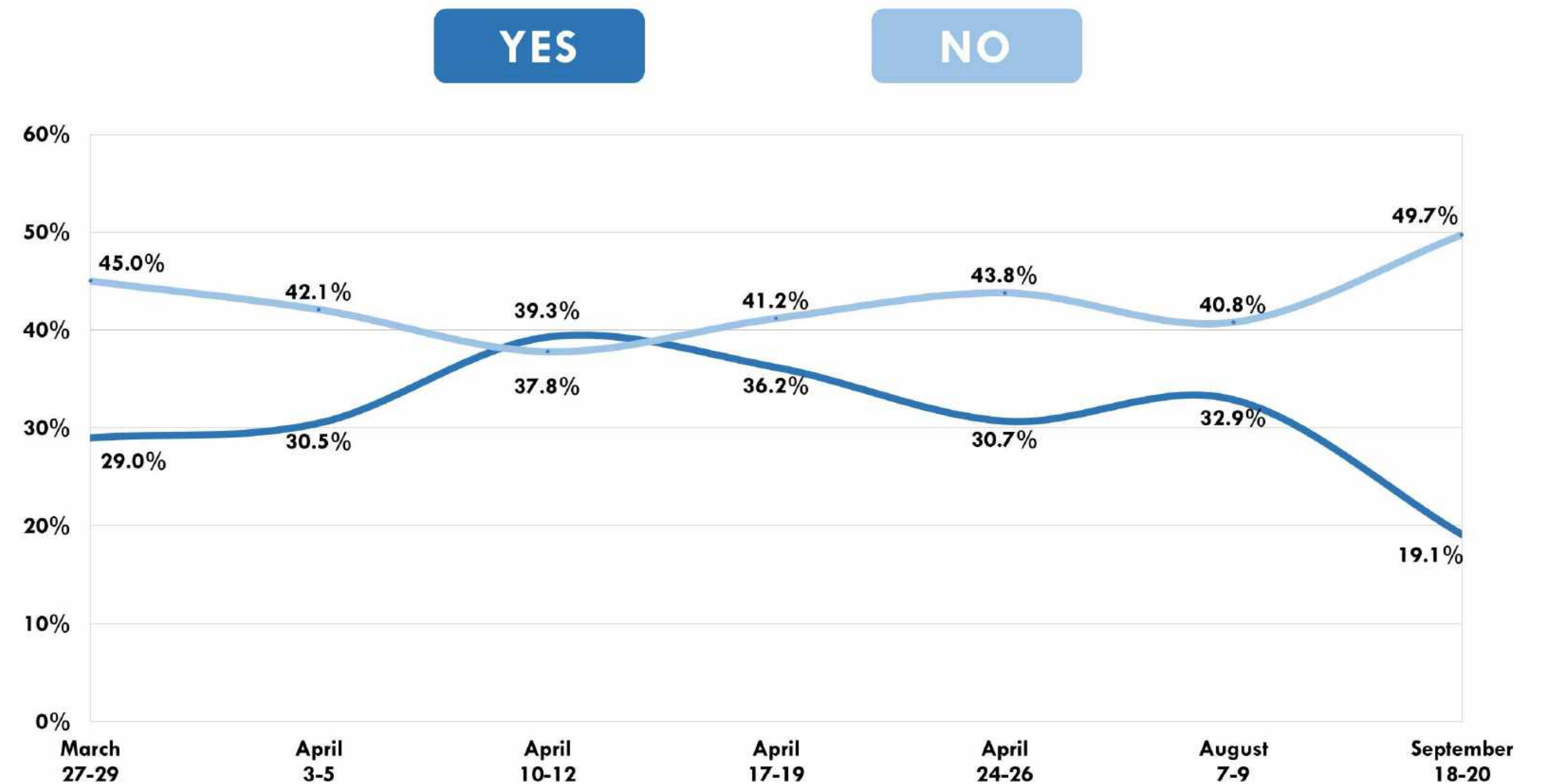
Expectations to Change Types of Destinations to Travel to After the Pandemic

With these growing feelings of safety surrounding travel, less Americans are saying they are going to change the types of travel destinations they choose to visit post-pandemic. In April nearly 40% of American travelers agreed they would change the destinations they traveled to, now less than 20% do—a 50% decrease. In addition, among those that are saying they will change the types of destinations they choose to visit, more positive reasons are being offered up as to why than in prior months, including an increased willingness to explore new destinations and crossing places off their bucket lists.

Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit? (Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

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

EXPECTATIONS TO CHANGE TYPES OF DESTINATIONS TO TRAVEL TO AFTER THE PANDEMIC



Inability to Fully Enjoy Travel Right Now

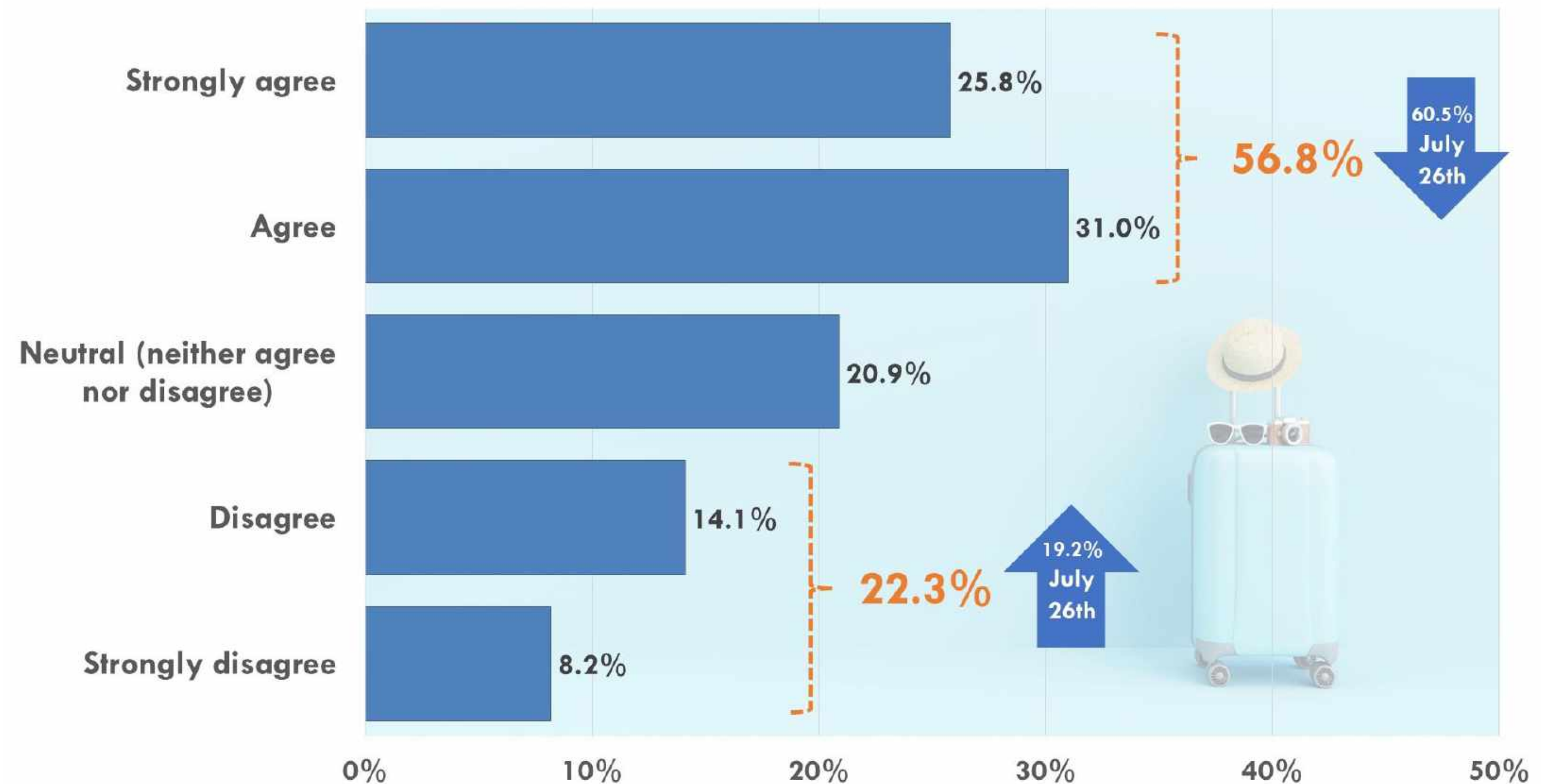
Finally, Americans are also less likely to feel their leisure travel will be dampened by the current state of things.

This week, 56.8% agreed that if they were to travel now for leisure, they would not be able to fully enjoy it, down from 60.5% at the end of July. And now just 43.1% have some agreement with the statement “I have lost my interest in/taste for traveling for the time being,” down from 49.5%.

Question: How much do you agree with the following statement?
Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.

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

INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW



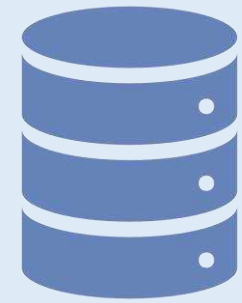


Coronavirus Travel Sentiment Index

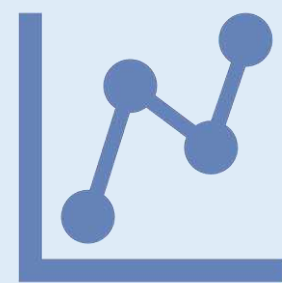
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of September 21st

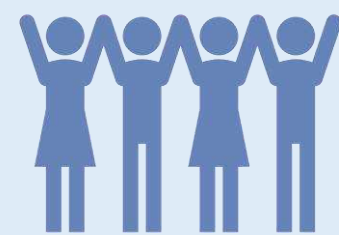
What is a Predictive Index?



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



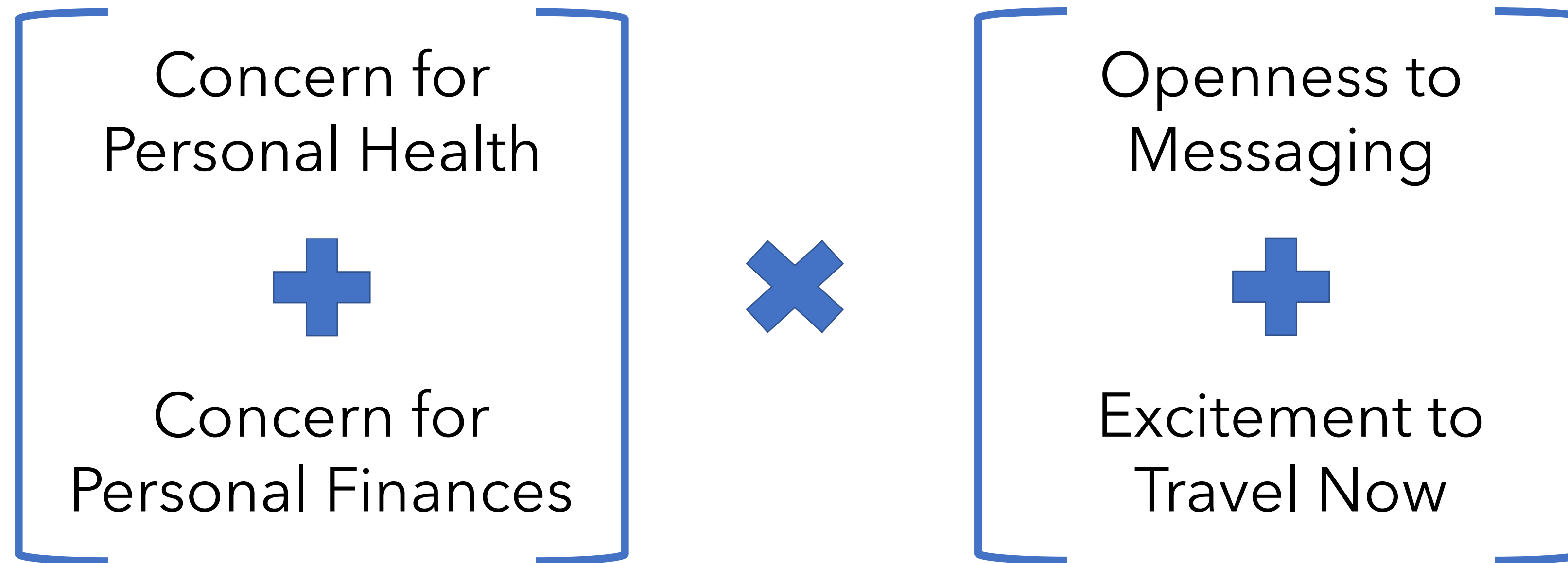
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

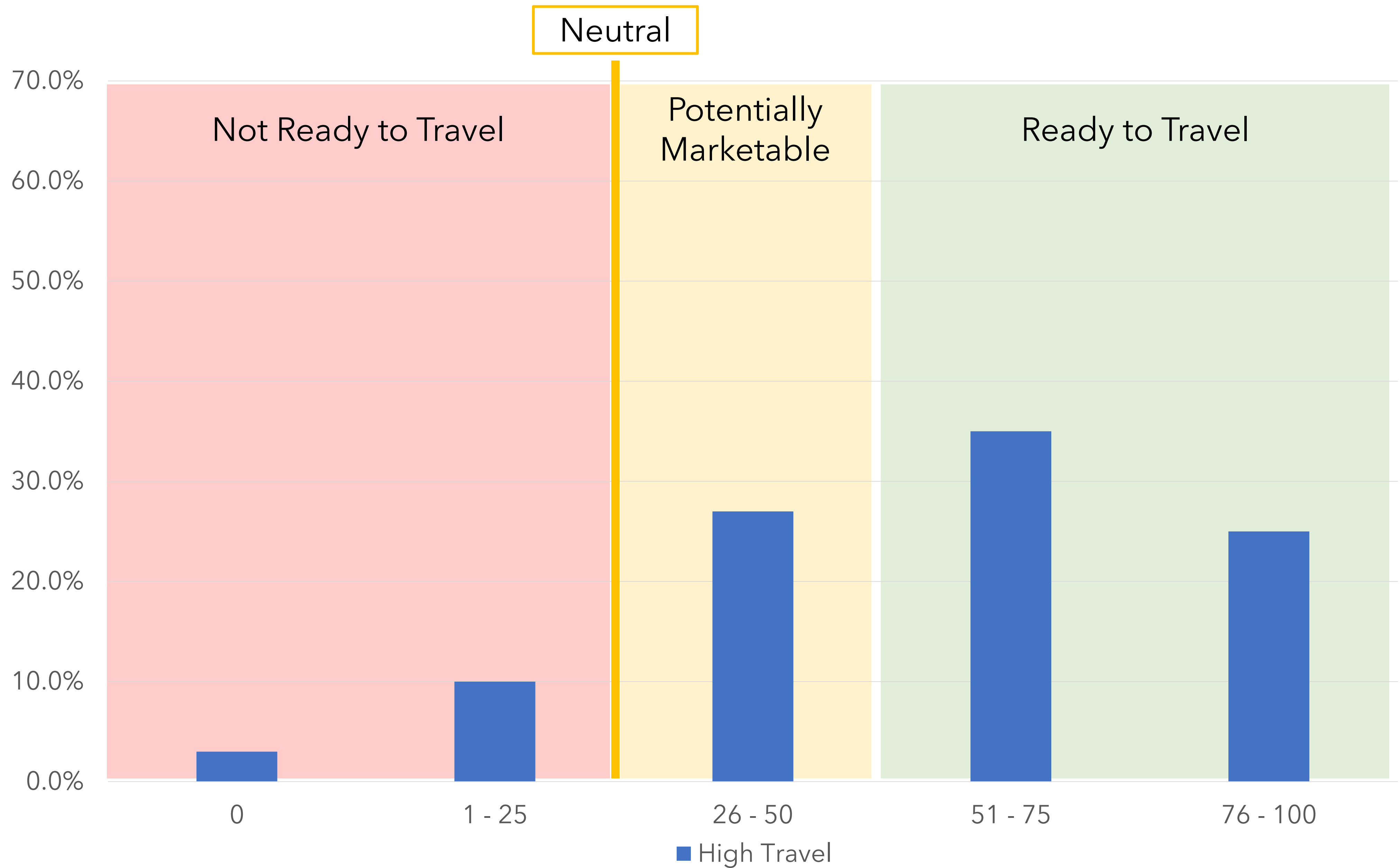
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



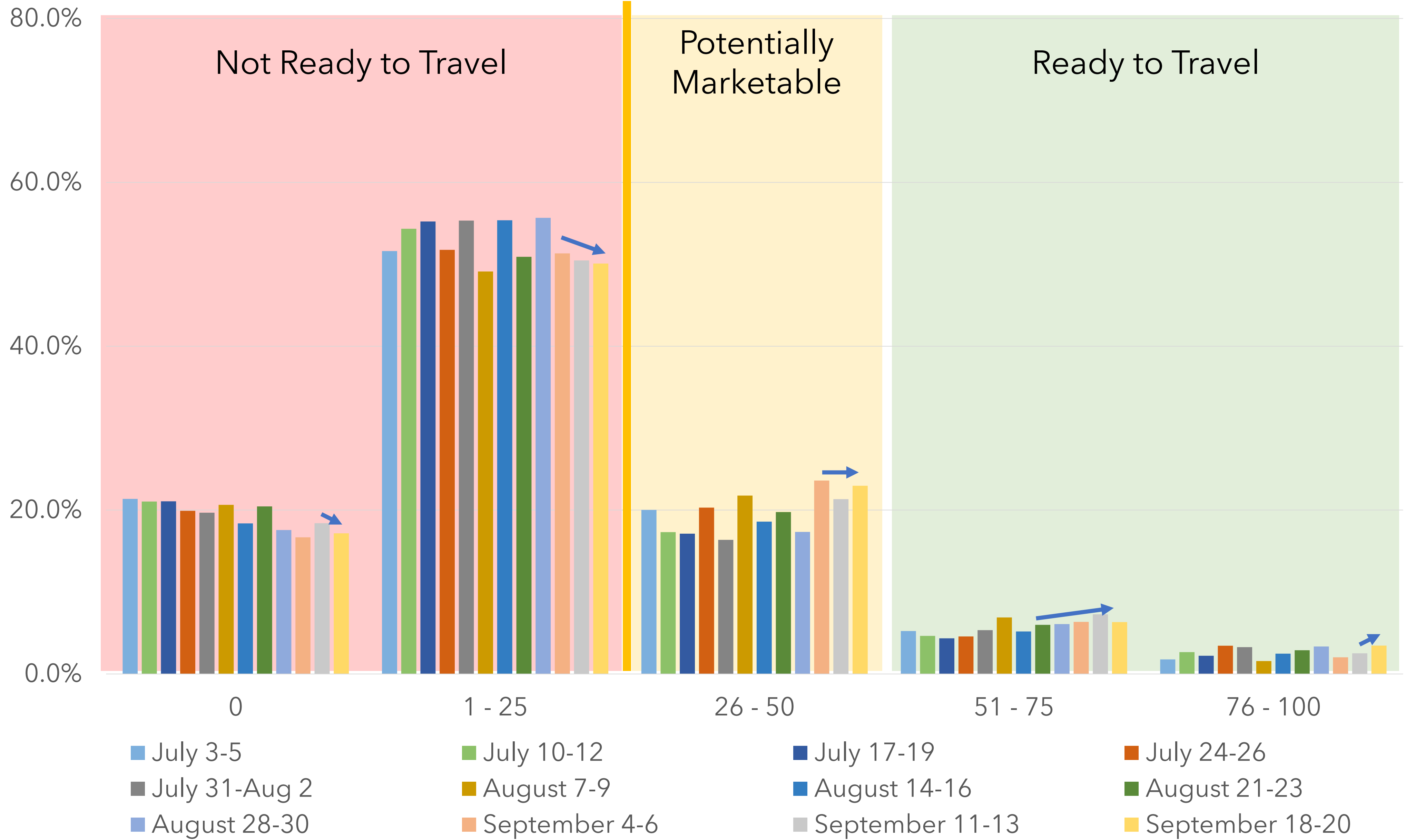
*Normalized to a 100pt scale

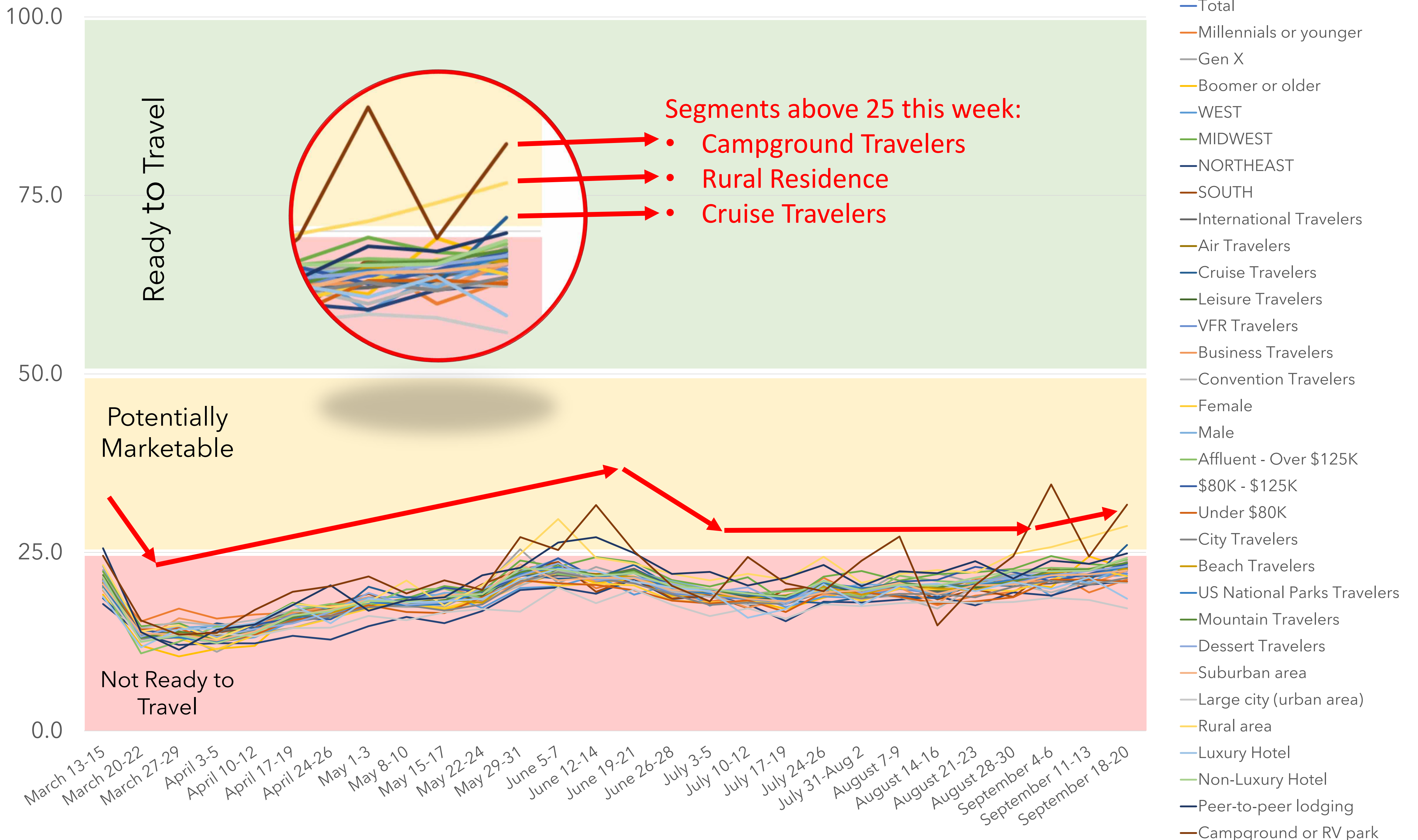
Healthy Travel Outlook



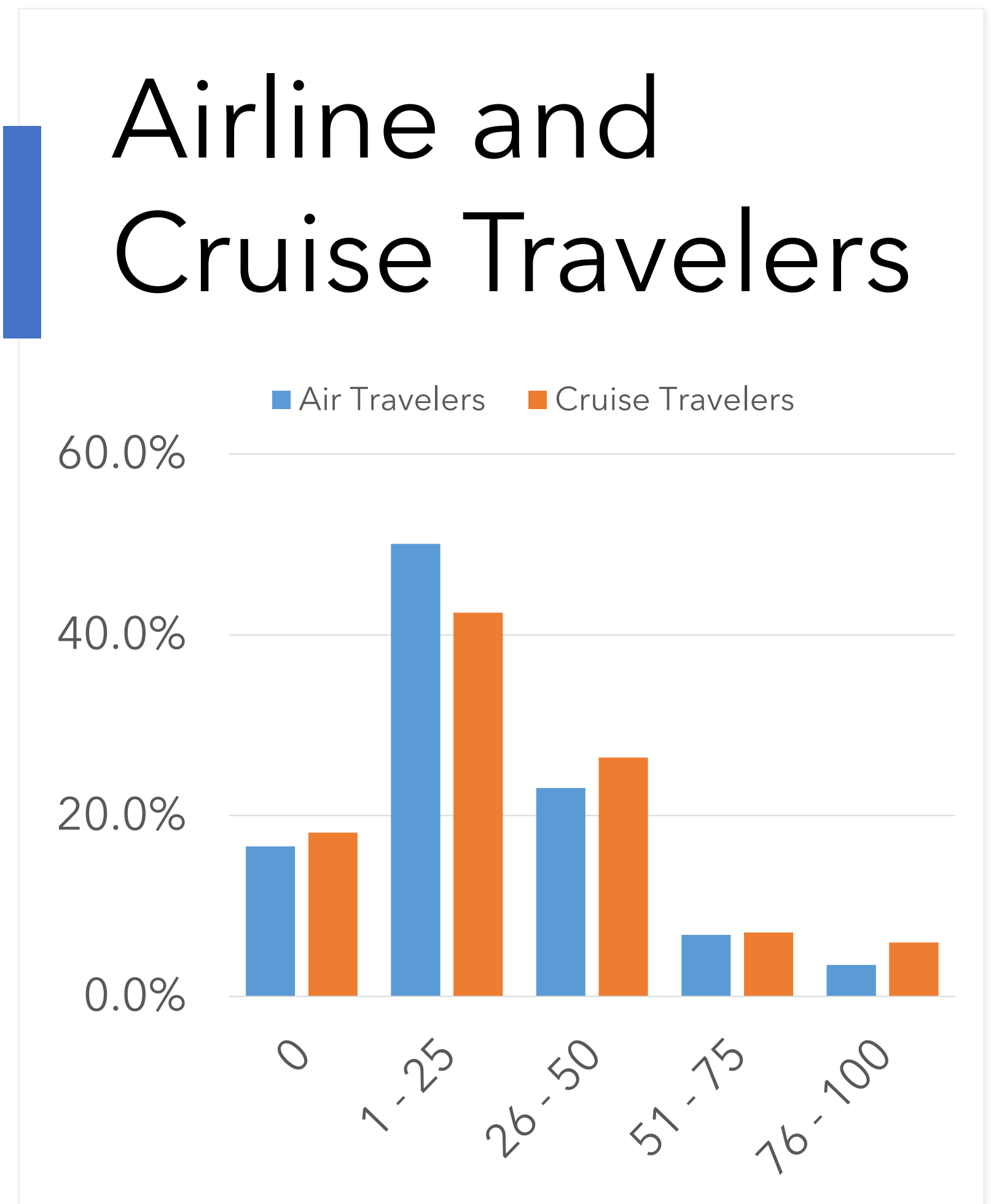
Travel Outlook

Neutral

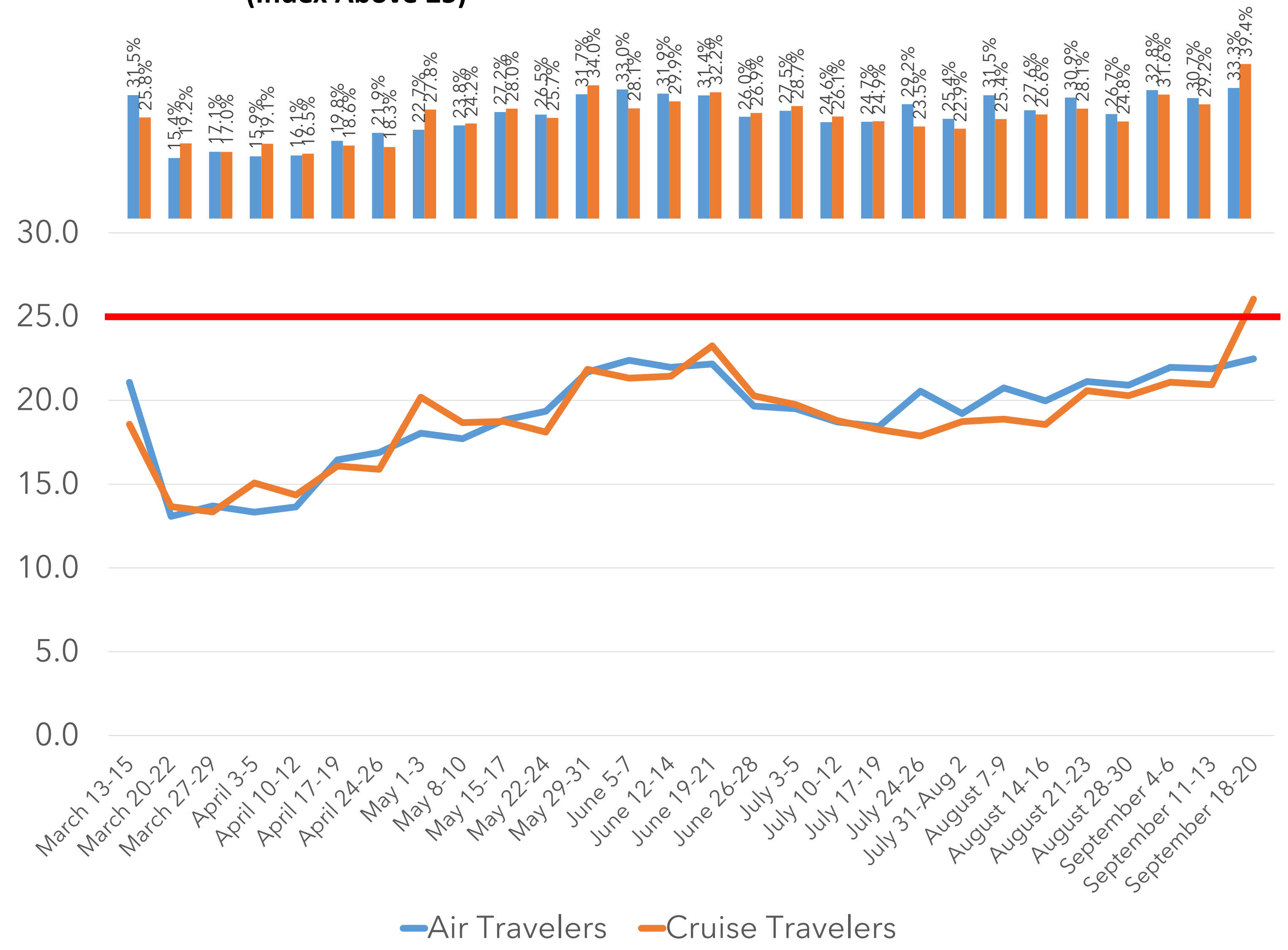




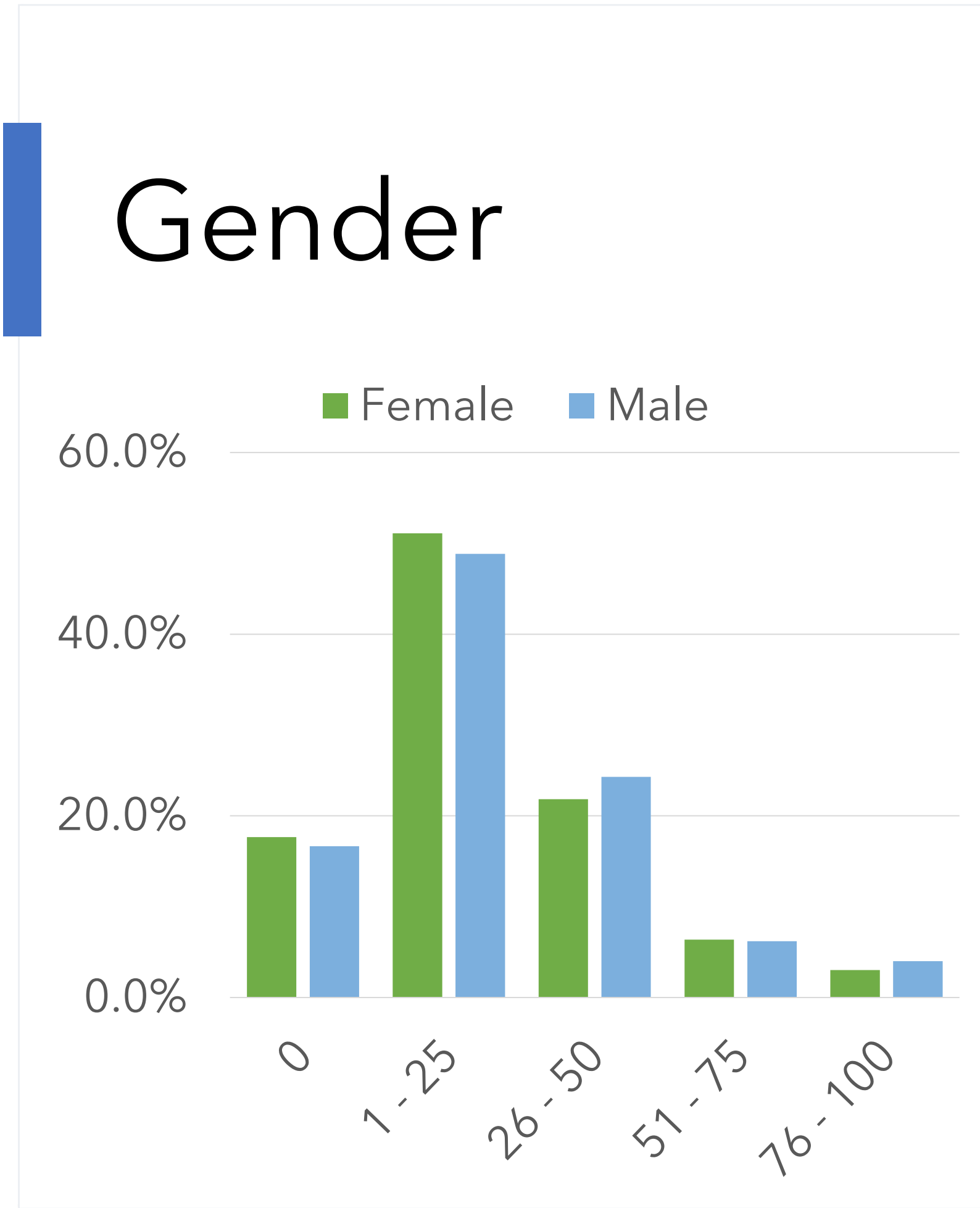
Airline and Cruise Travelers



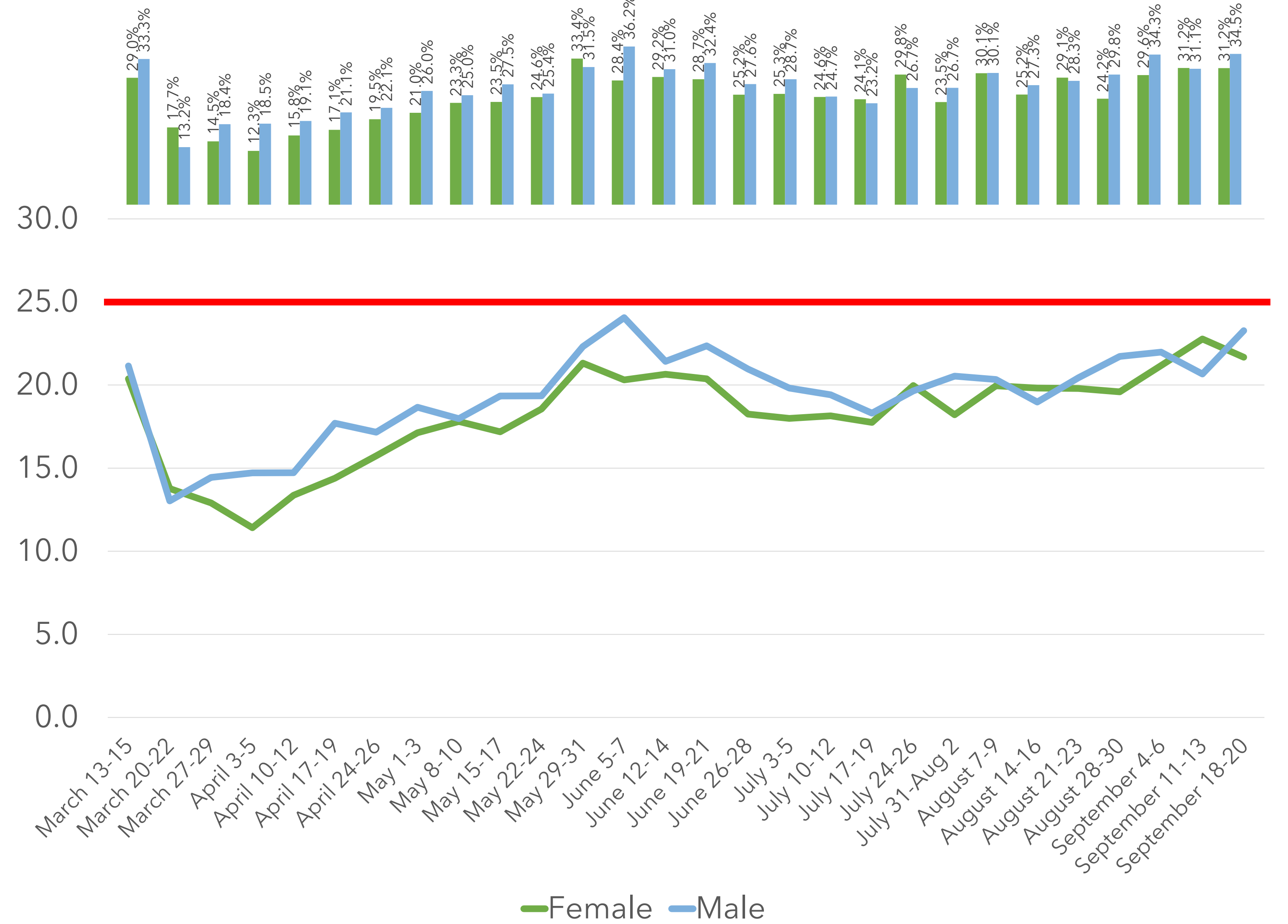
Percent Potentially Marketable (Index Above 25)



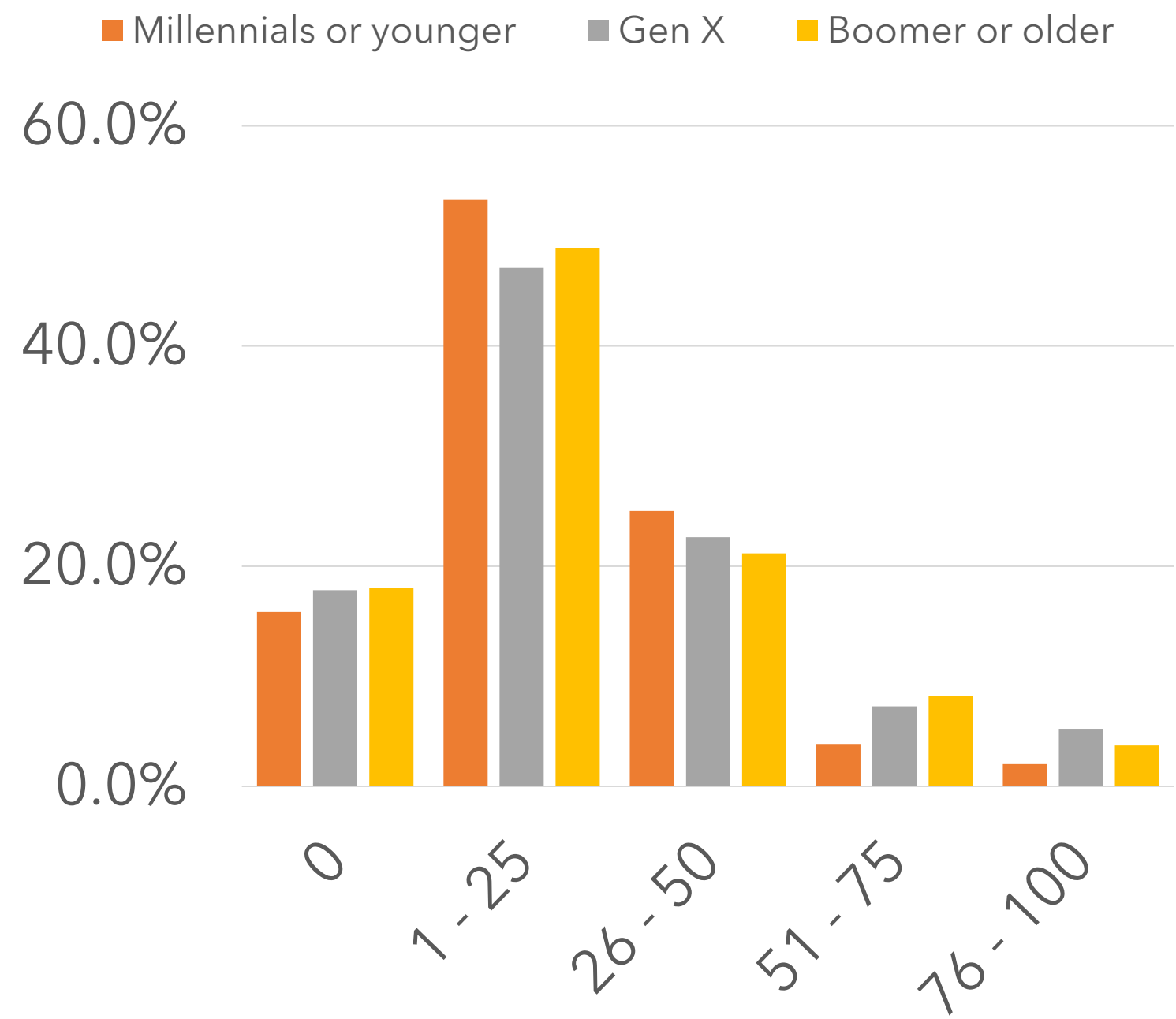
Gender



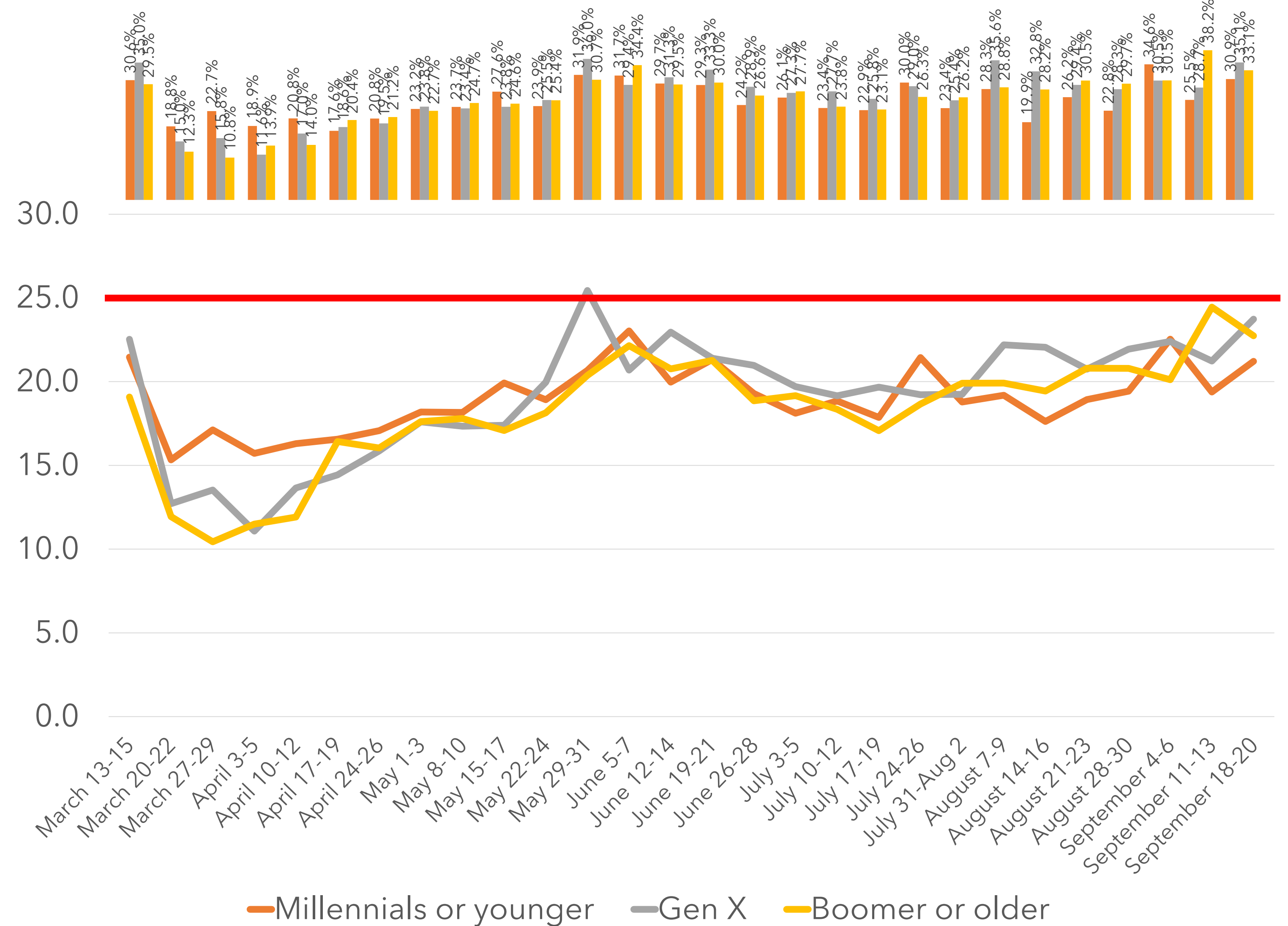
Percent Potentially Marketable (Index Above 25)



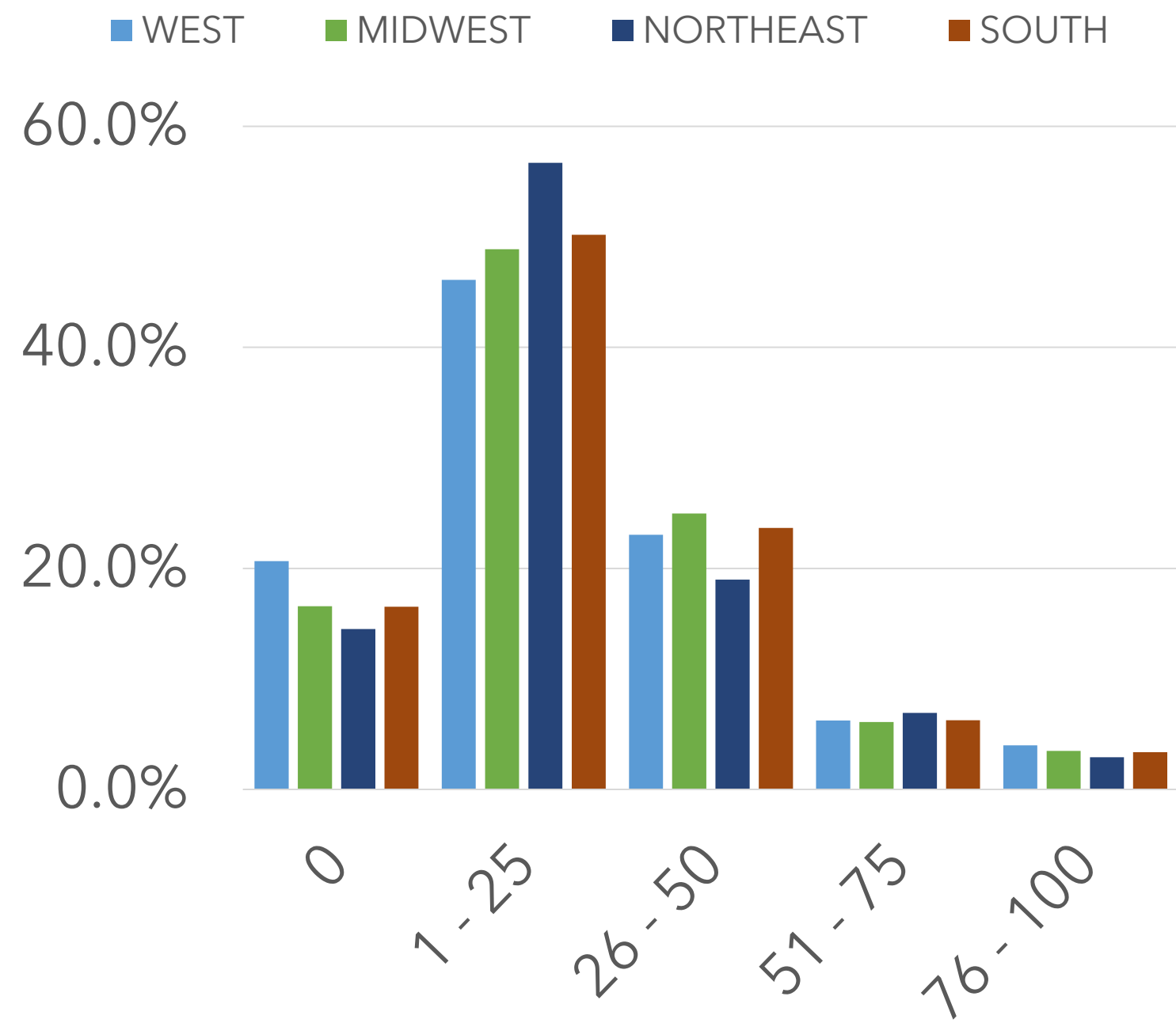
Generation



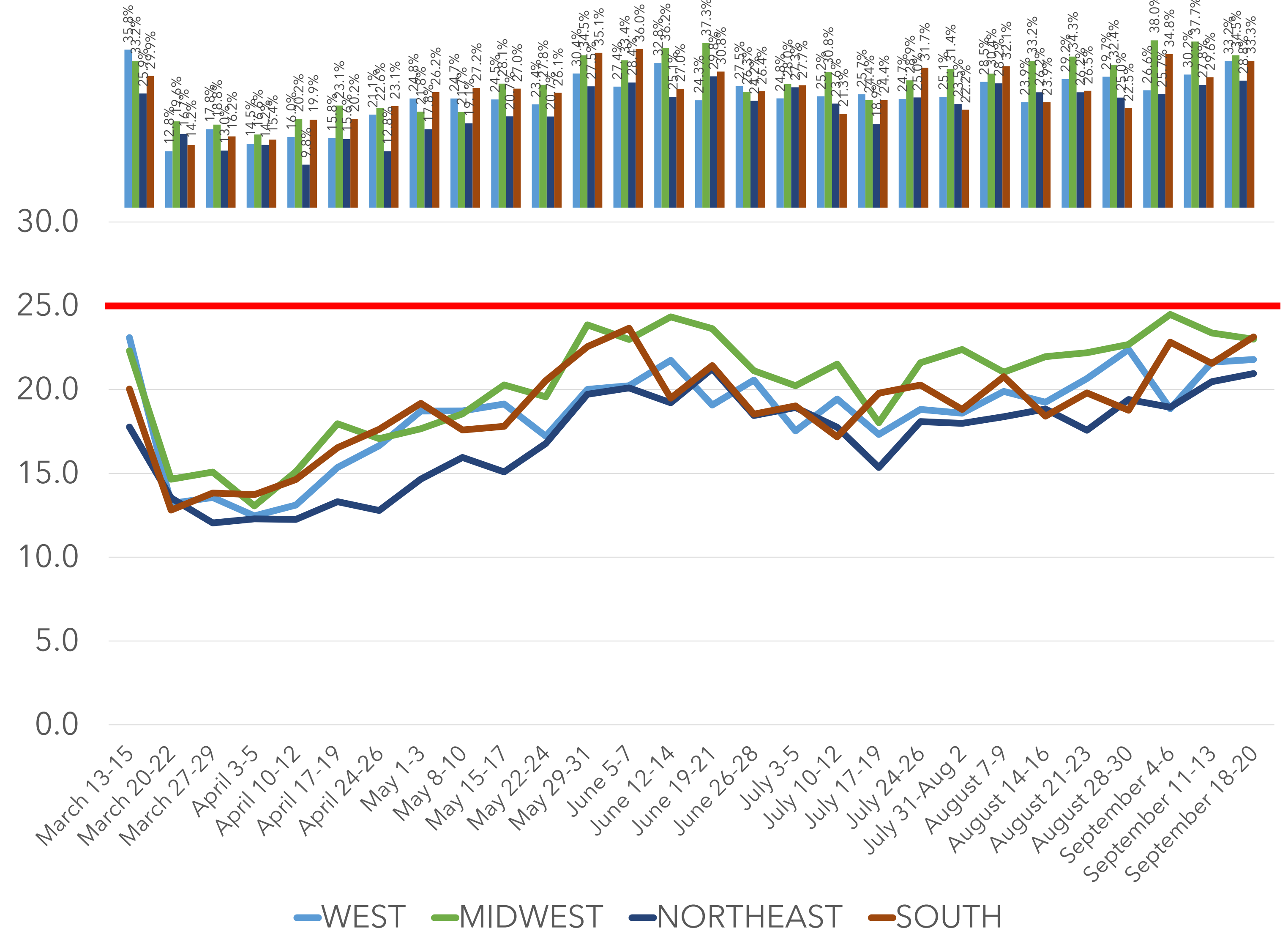
Percent Potentially Marketable (Index Above 25)



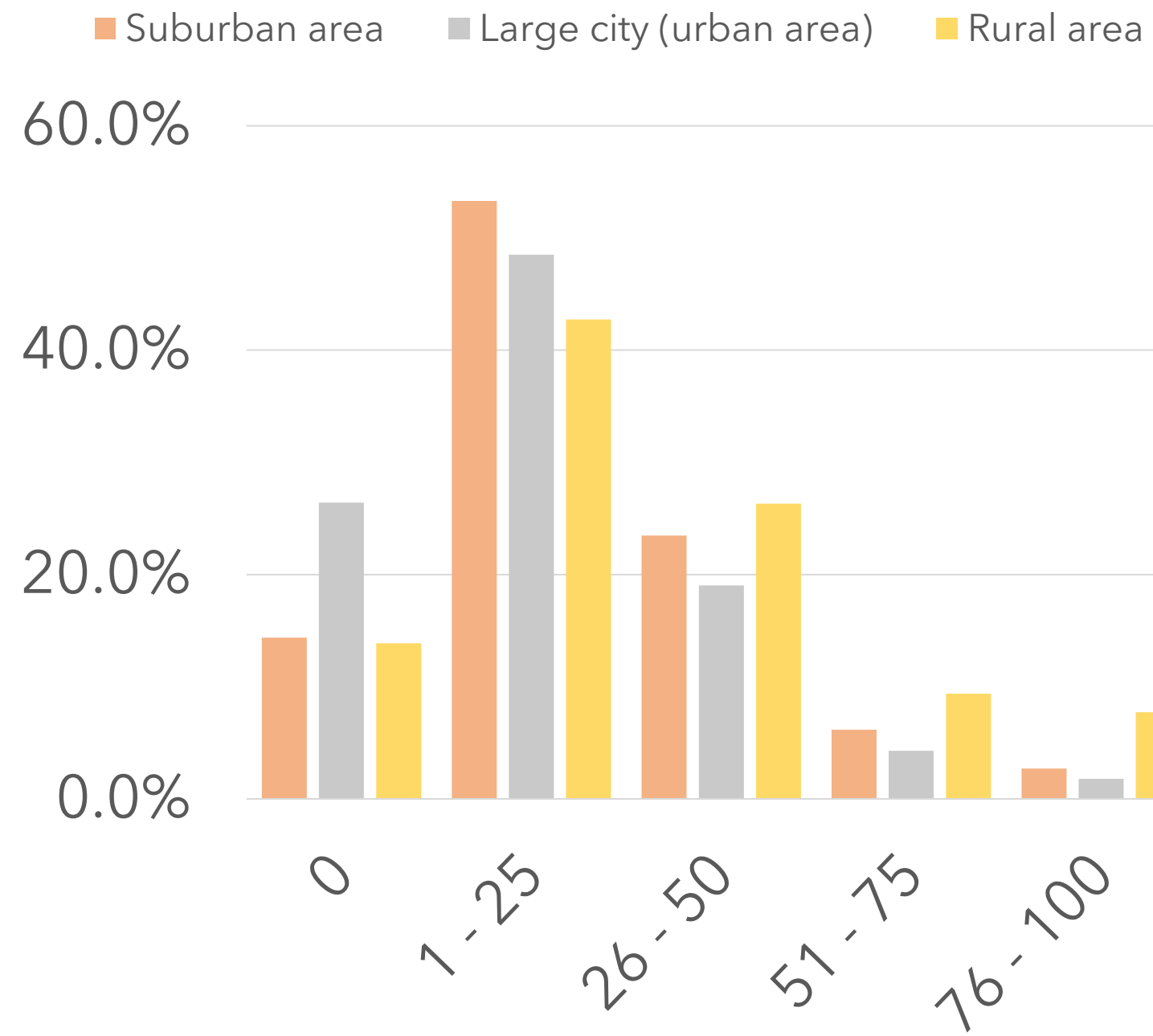
US Regions



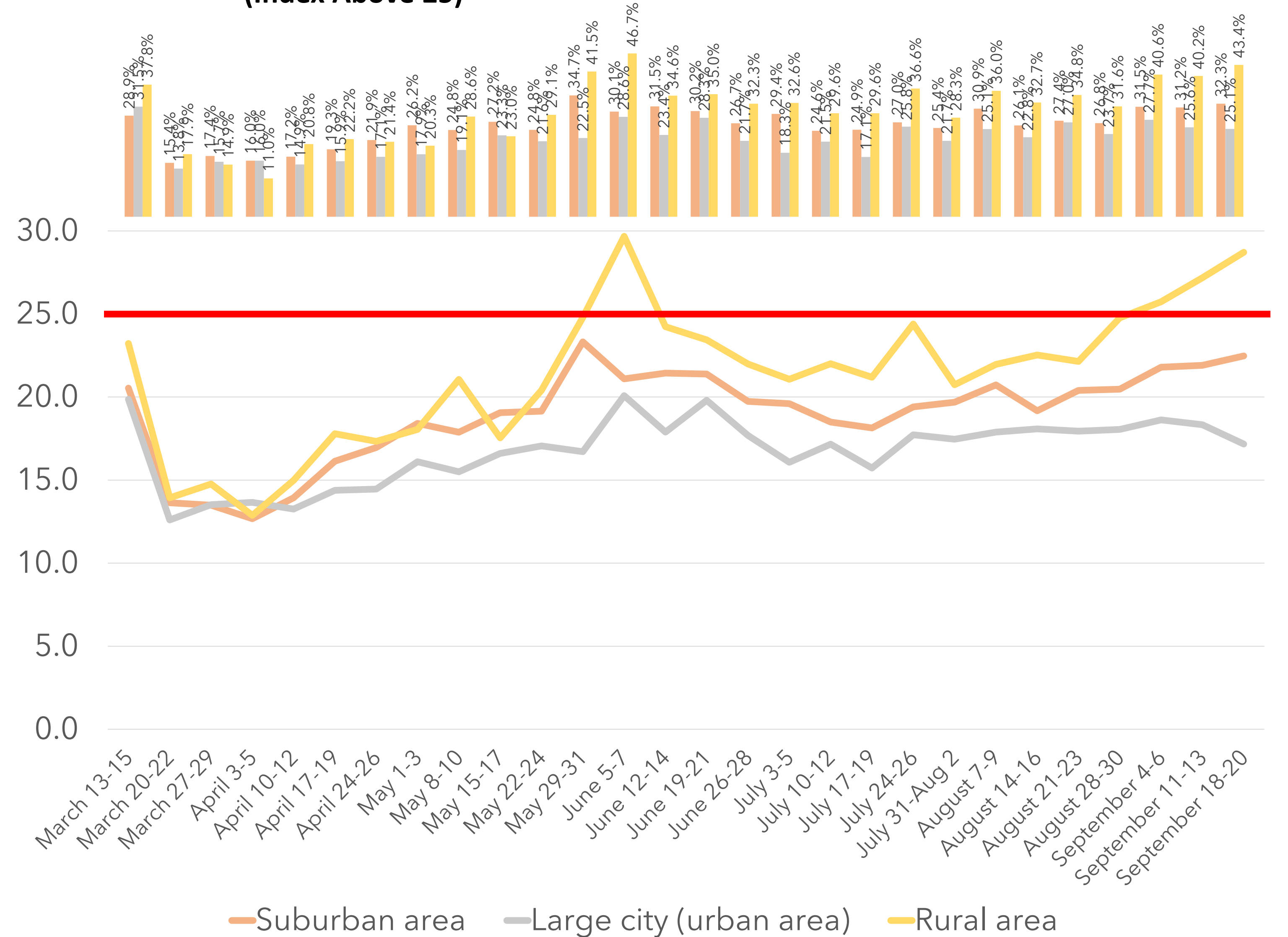
Percent Potentially Marketable (Index Above 25)



Residence Type

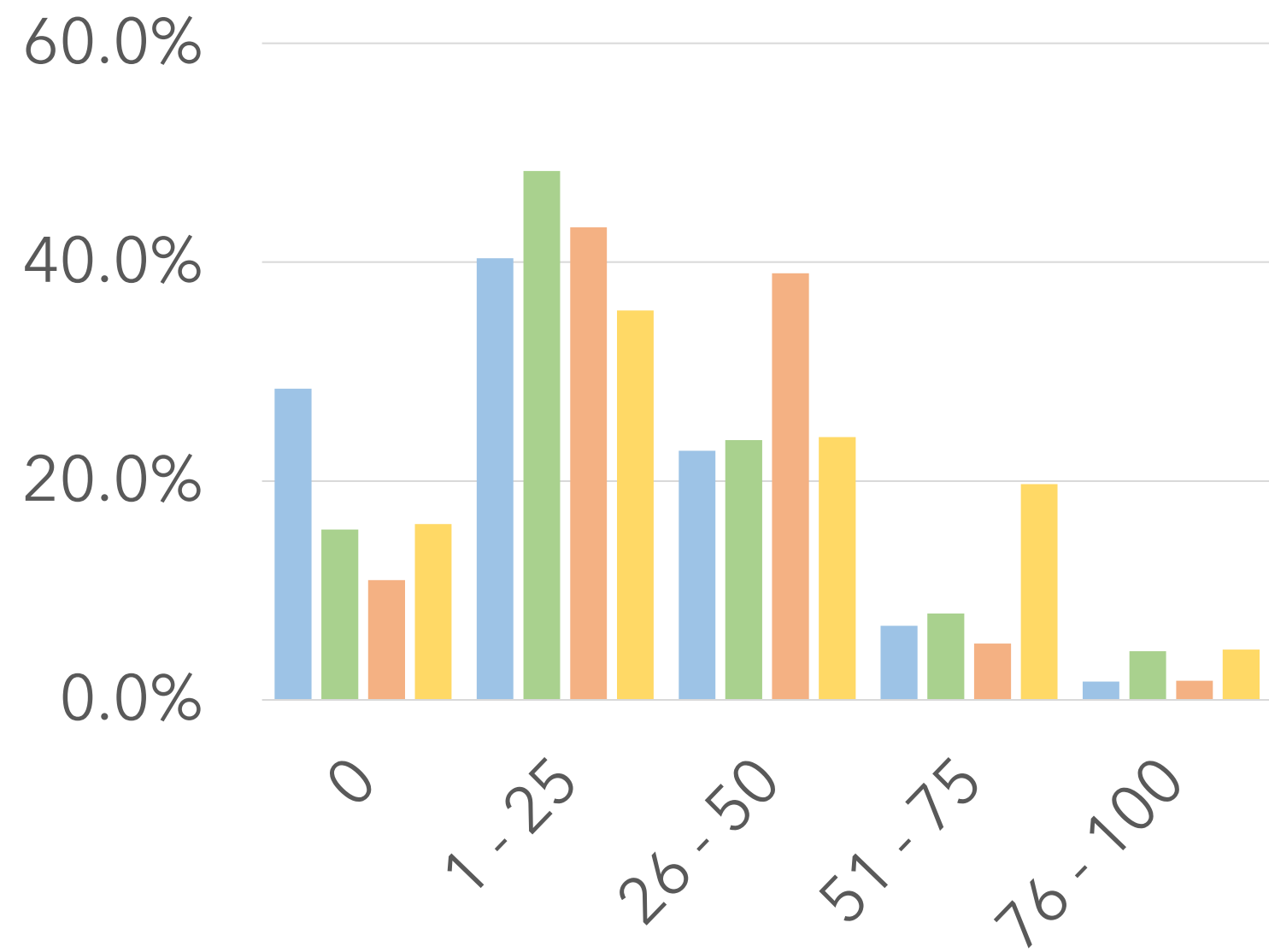


Percent Potentially Marketable (Index Above 25)

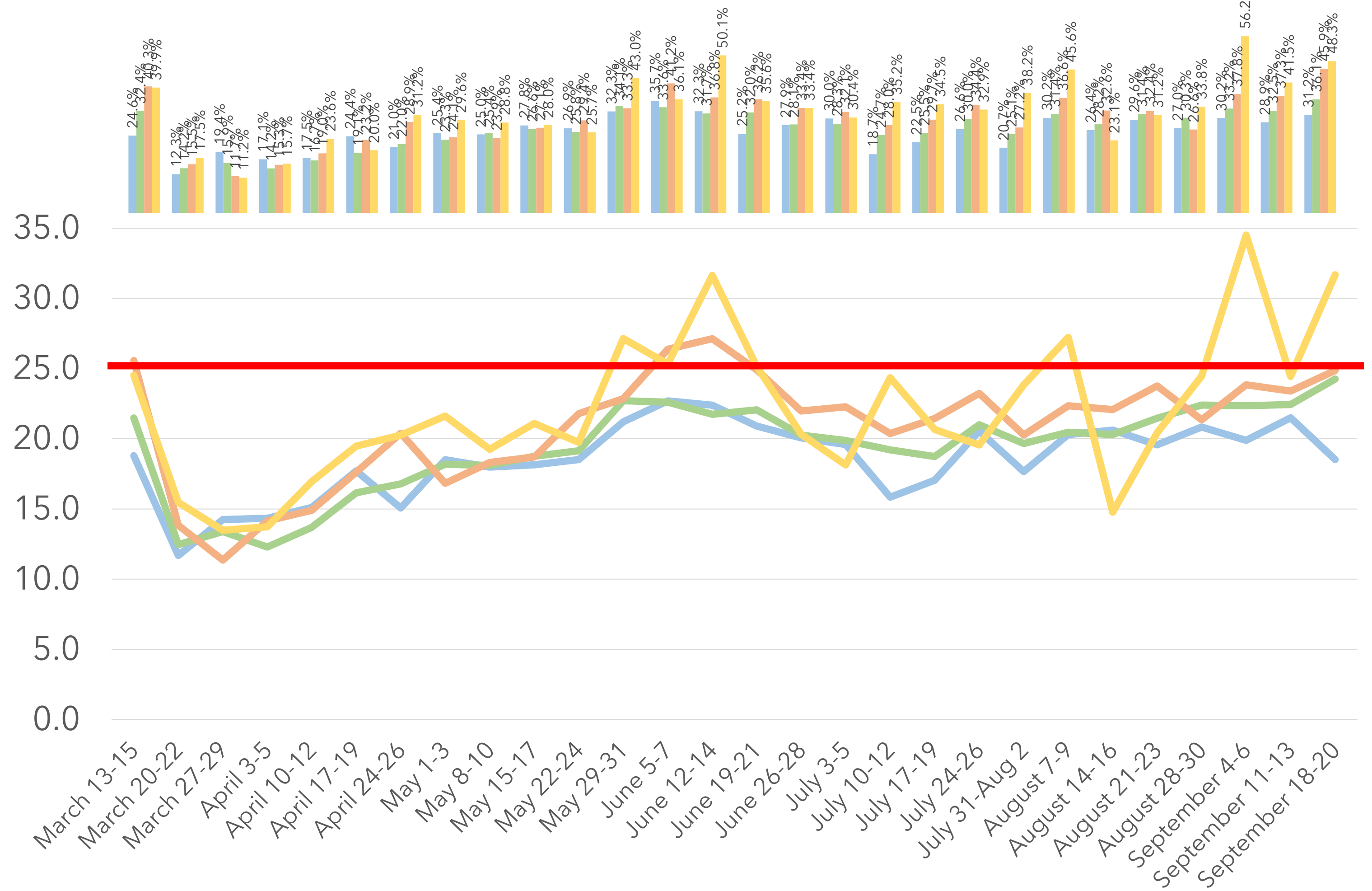


Lodging Preference

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



Percent Potentially Marketable (Index Above 25)



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



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