

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF November 2nd, 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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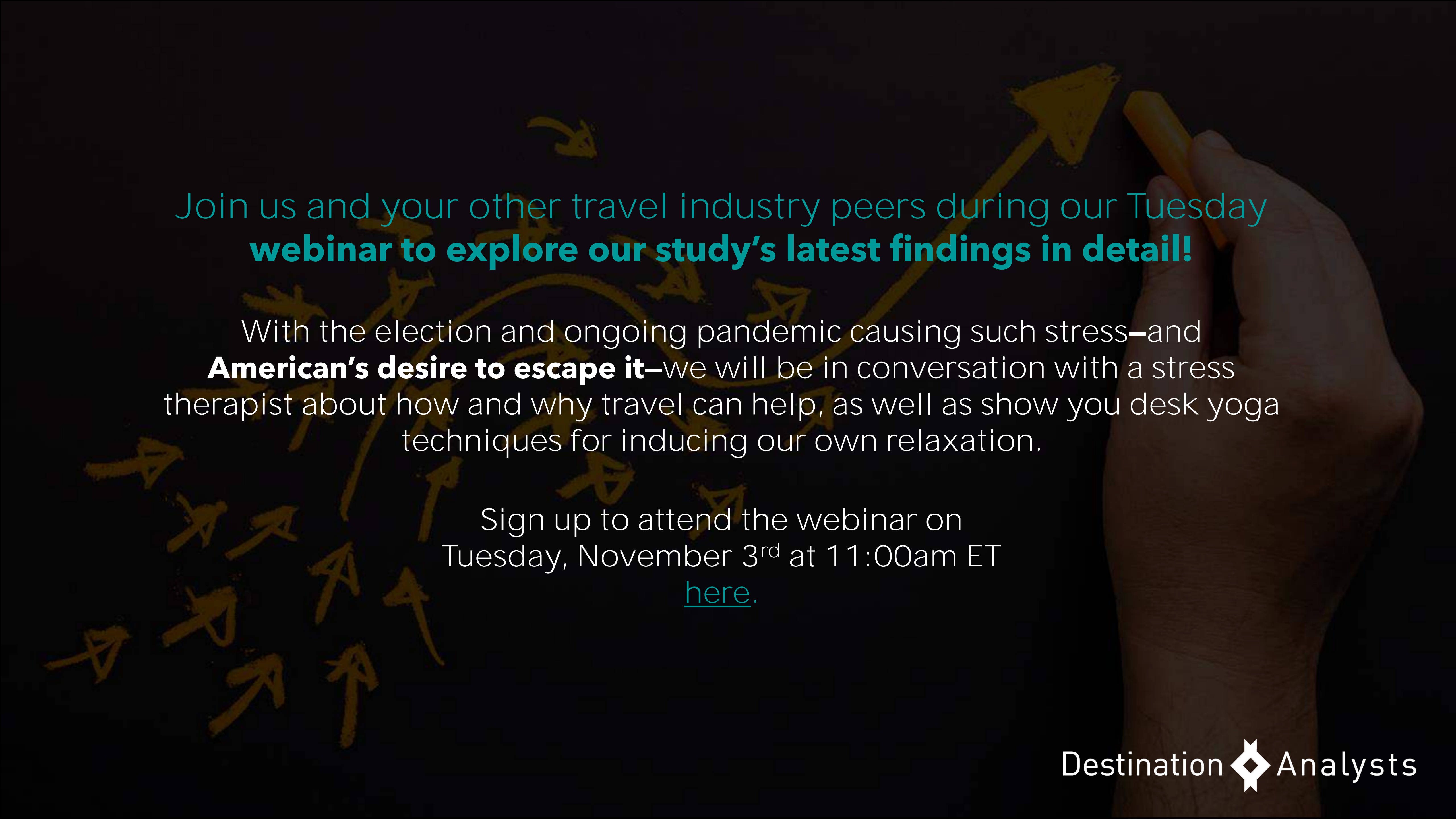
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Join us and your other travel industry peers during our Tuesday
webinar to explore our study's latest findings in detail!

With the election and ongoing pandemic causing such stress—and
American's desire to escape it—we will be in conversation with a stress
therapist about how and why travel can help, as well as show you desk yoga
techniques for inducing our own relaxation.

Sign up to attend the webinar on
Tuesday, November 3rd at 11:00am ET
[here](#).

A person wearing a colorful plaid shirt, a grey beanie, and brown pants is crawling on a dark, gravelly surface. Their hands are flat on the ground, and their head is down. The background is dark and textured, suggesting a night scene or a dark outdoor area.

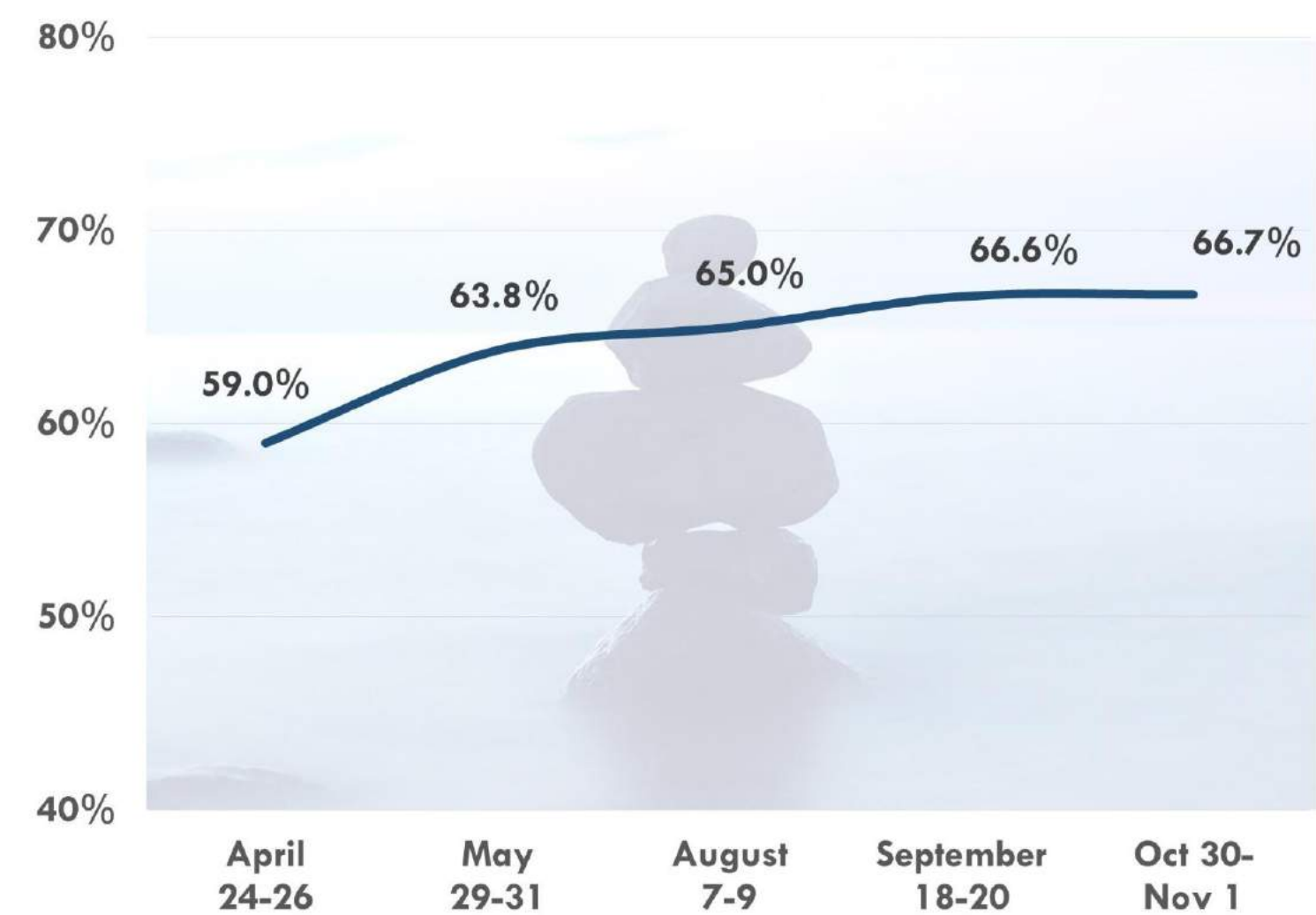
Key Findings for the Week of November 2nd

Please cite [Destination Analysts](#) when using or distributing this data

Stress & Relaxation Among American Travelers

Although Tuesday’s election and rising COVID-19 cases certainly serve as sources of potential tension, since April, American travelers have been increasingly prioritizing relaxation as a lifestyle priority. Perhaps in part to this, the average level of daily stress Americans have been feeling has been on the decline since the summer.

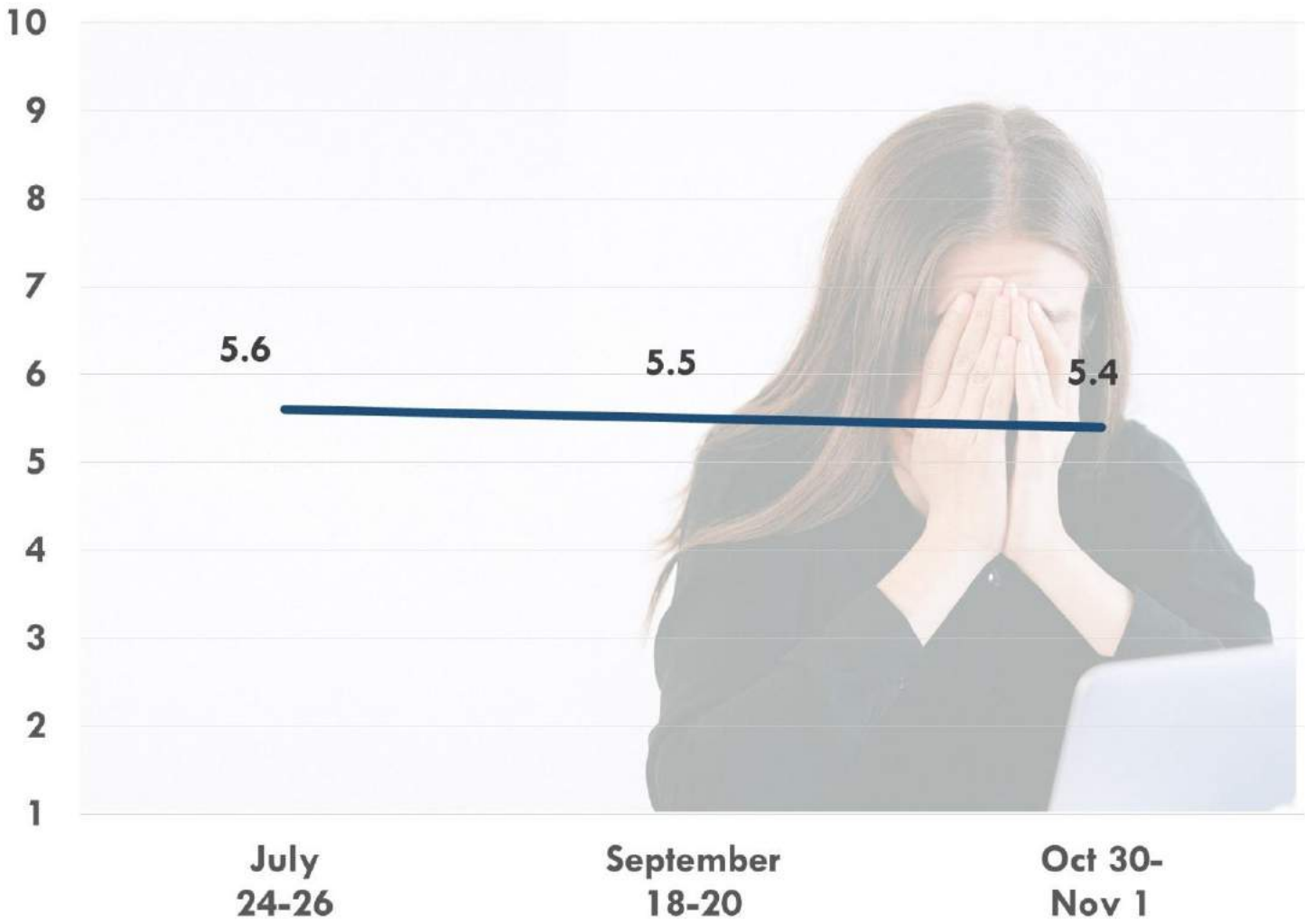
PRIORITIZING RELAXATION IN THEIR LIFESTYLE IN THE NEXT 6 MONTHS



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: Waves 7, 12, 22, 88 and 34. All respondents, 1,208, 1,257, 1,201, 1,200 and 1,203 completed surveys.)

AVERAGE DAILY STRESS LEVEL 10-POINT SCALE (10 = SEVERE, FREQUENT STRESS AND 1 = NO STRESS)

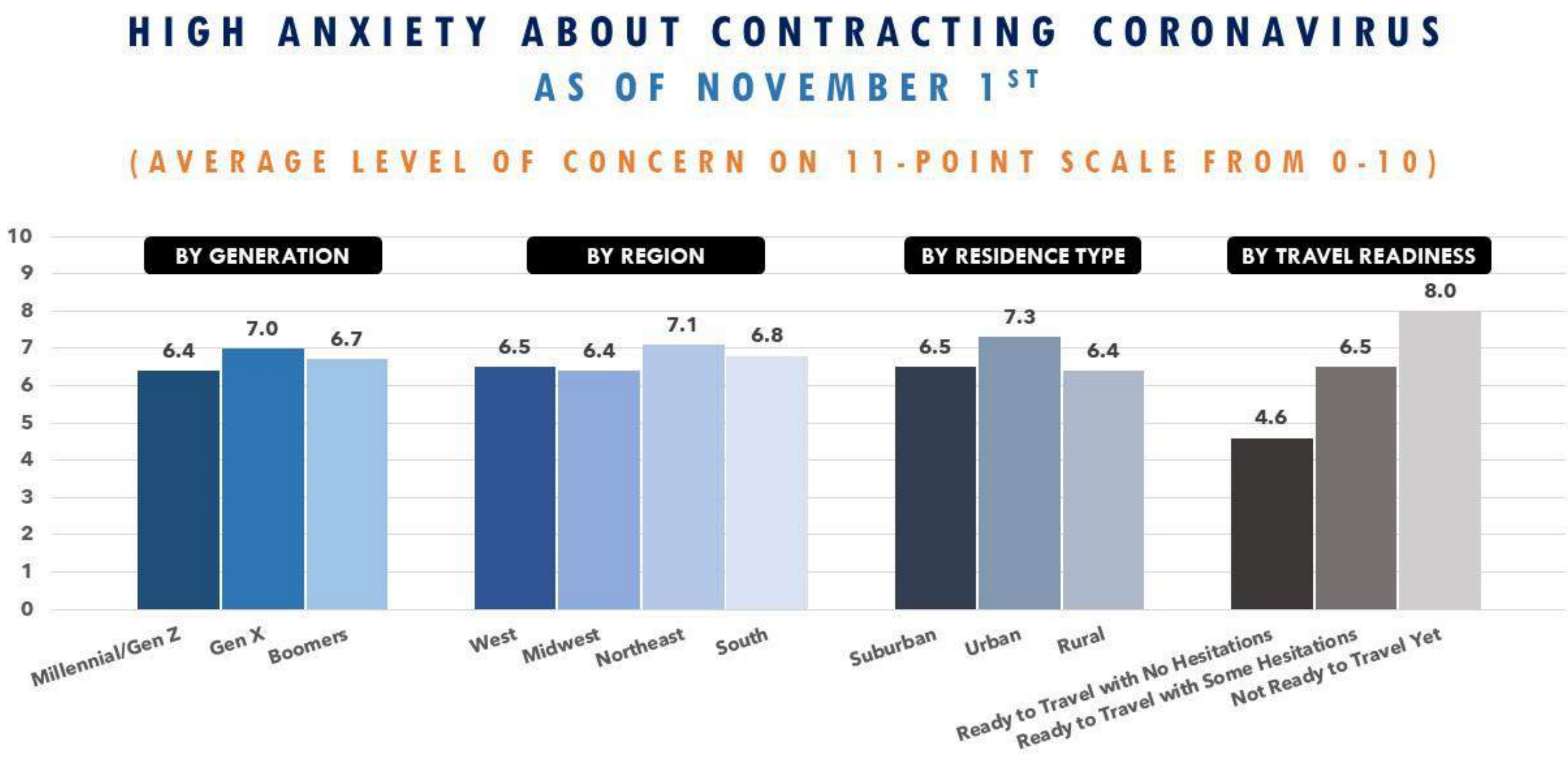


Question: Thinking about the last month, please rate your average level of daily stress from 1 – 10.

(Base: Waves 20, 28 and 34. All respondents, 1,206, 1,200, and 1,203 completed surveys.)

High Anxiety about Contracting Coronavirus

Overall, the percent of Americans who feel high degrees of concern about personally contracting COVID-19 trended down this week to 69.3% from 72.0%. Virus anxiety is uneven across the country—now highest in the Northeast and Southern regions, among Gen X, urban residents and those feeling not yet ready to travel.



Question: Thinking about the current coronavirus situation, in general, how concerned are you personally about contracting the virus?

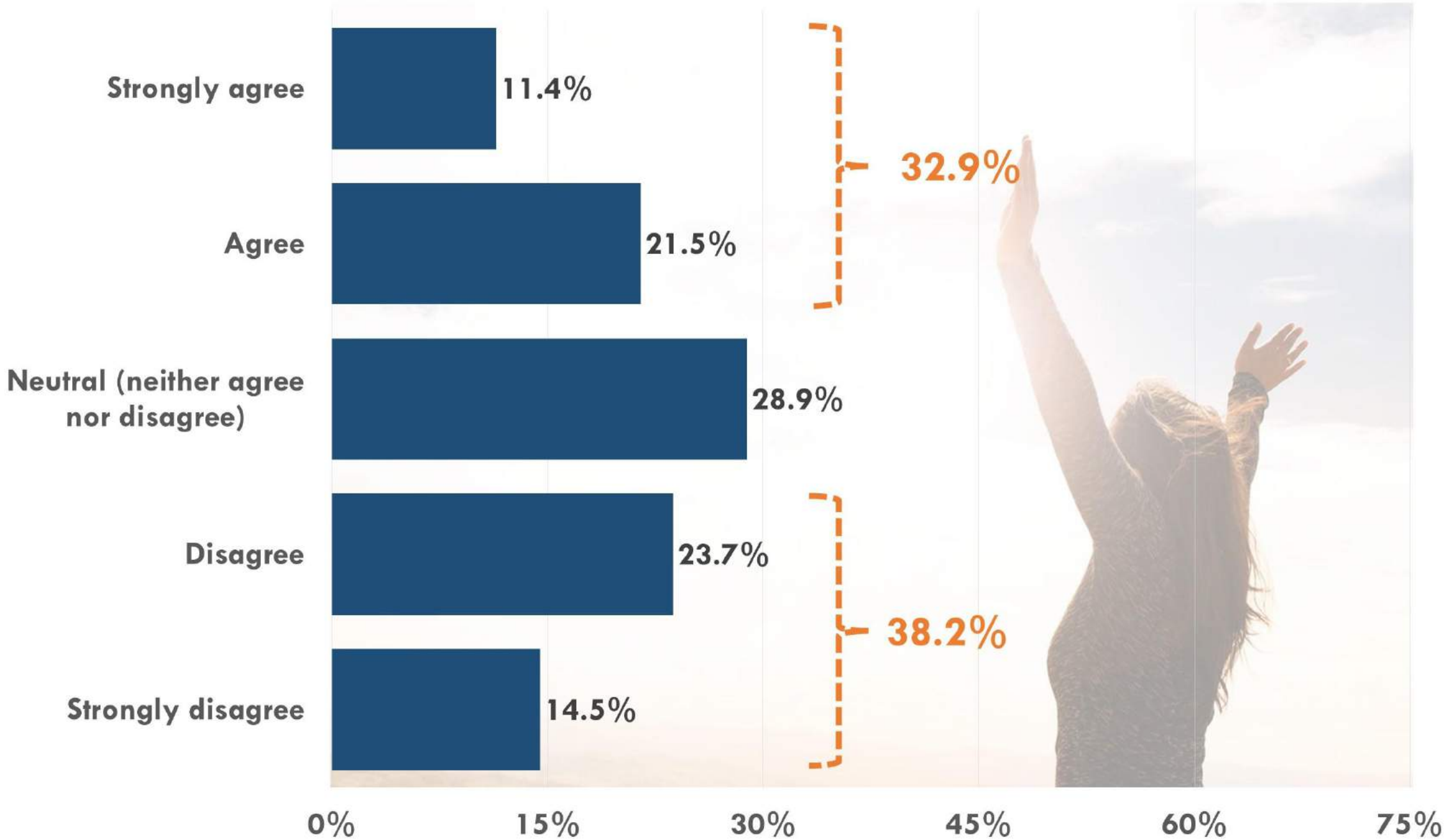
(Base: Wave 34 data. All respondents, 1,203 completed surveys. Data collected Oct 30-Nov 1, 2020)

Belief that Things are Going to Get Better Soon

American travelers are somewhat split on maintaining their optimism, with 32.9% believing things will get better soon and 38.2% not.

However, they largely see the immediate future as difficult. This week 60.9% expect the pandemic situation to get worse in the United States in the next month, up over 5% in one week. In addition, 62.6% expect this Coronavirus will thrive in the upcoming cold weather.

BELIEF THAT THINGS ARE GOING TO GET BETTER SOON
AS OF NOVEMBER 1ST



Question: How much do you agree or disagree with the following statements?
Statement: Things are going to get better soon.

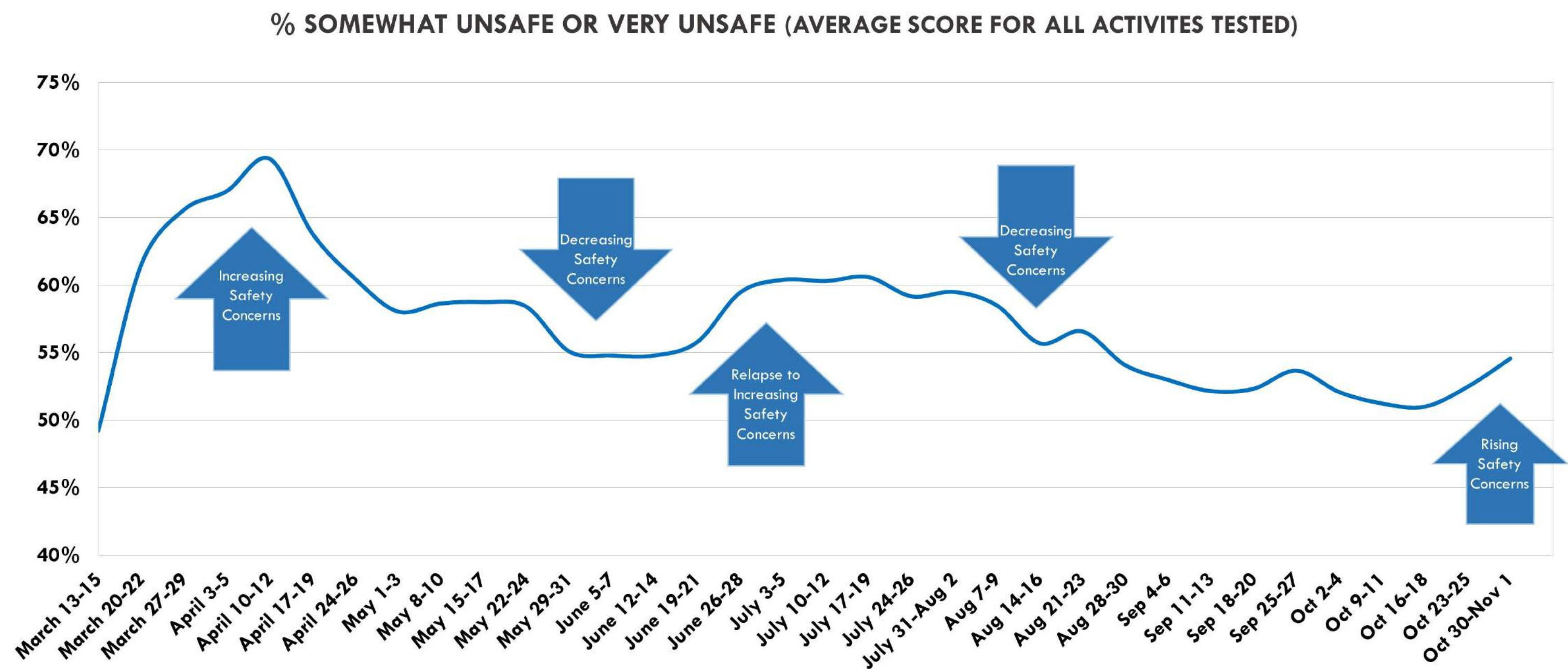
(Base: Wave 34 data. All respondents, 1,203 completed surveys. Data collected Oct 30-Nov 1, 2020)

Perceived Safety of Travel Activities

The worsening feelings about the pandemic continue to negatively impact sentiment towards travel in the near-term.

Excitement levels about taking a getaway in the next month and openness to travel inspiration decreased again this week, while perceptions of travel activities as unsafe again increased. Confidence that they can travel safely in the current environment eroded 5 percentage points in the past 3 weeks (26.5% from 32.0%). Even comfort going out for leisure activities in their own communities has similarly declined (41.7% from 47.4% October 18th).

PERCEIVED SAFETY OF TRAVEL ACTIVITIES: WAVES 1-34 COMPARISON AS OF NOVEMBER 1ST



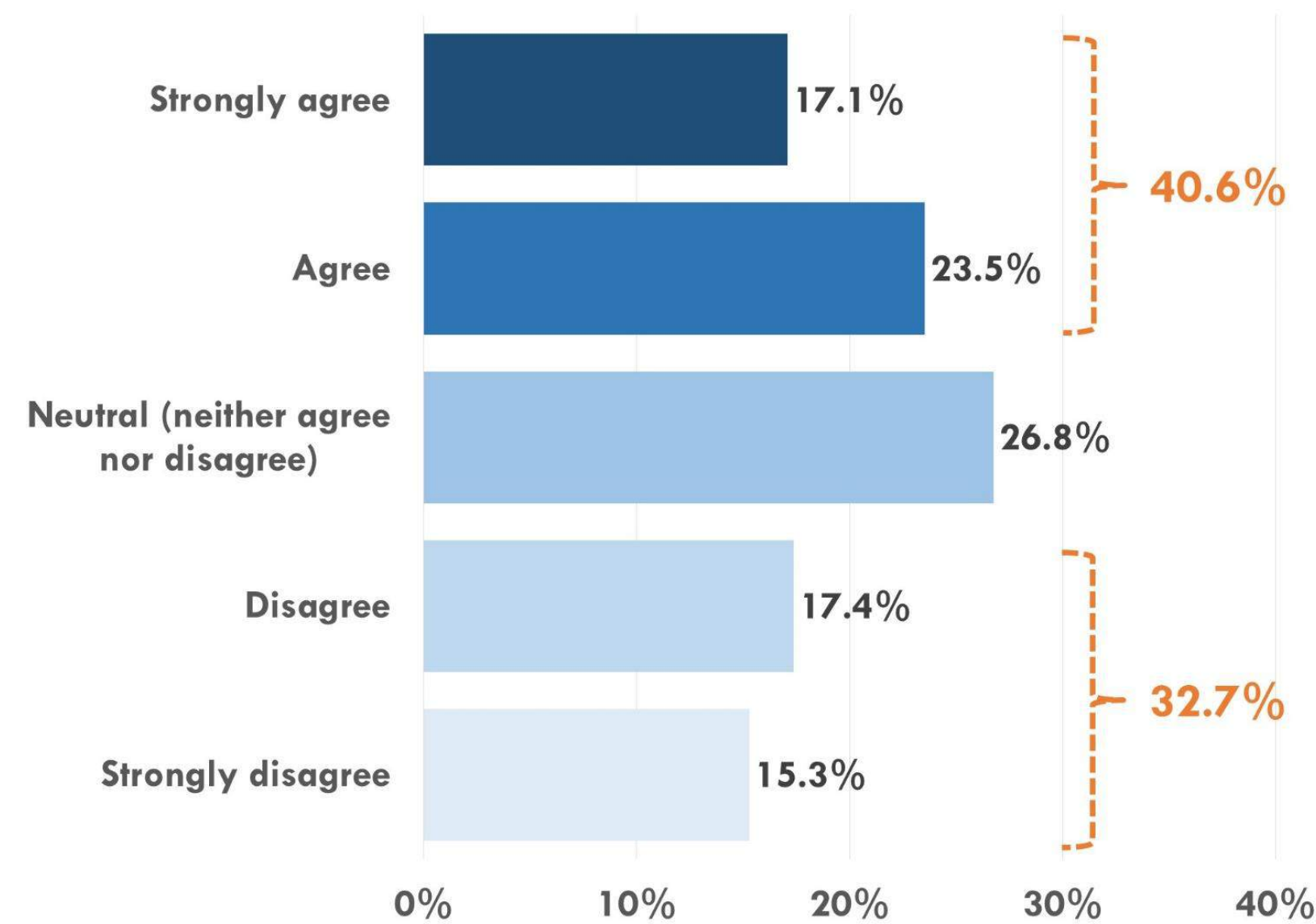
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 1-34. 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, 1,203, 1,203, 1,204, 1,203 and 1,203 completed surveys.)

Americans' Travel Guilt

These feelings extend into greater emotional depth. Fully half agree that traveling right now feels irresponsible. Over 40% feel, or would feel, guilty traveling right now.

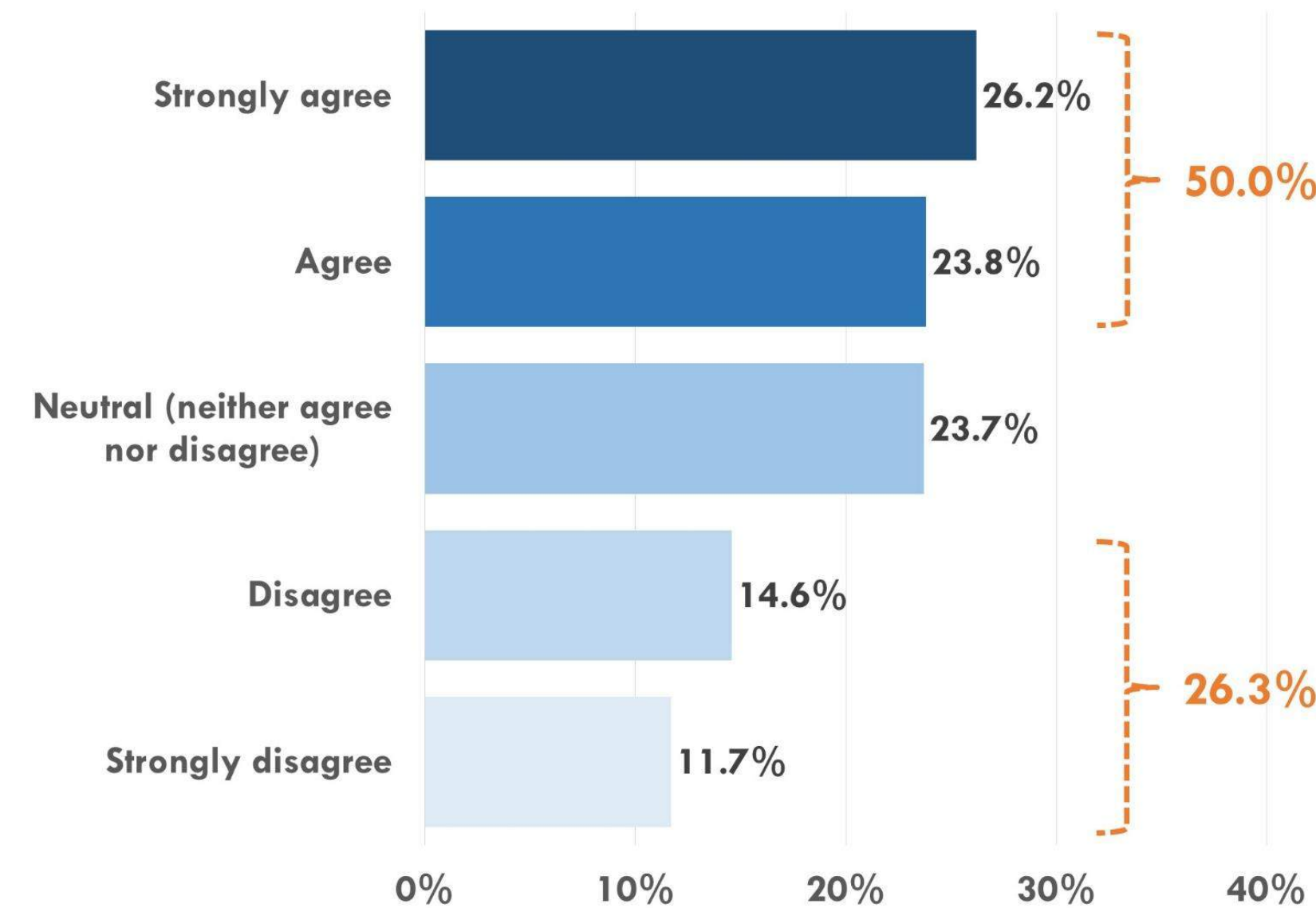
GUILT TRAVELING



Question: How much do you agree or disagree with the following statements?
Statement: I'd feel guilty traveling right now.

(Base: Wave 34 data. All respondents, 1,203 completed surveys. Data collected Oct 30-Nov 1, 2020)

TRAVEL FEELS IRRESPONSIBLE RIGHT NOW



Question: How much do you agree or disagree with the following statements?
Statement: Traveling right now is irresponsible.

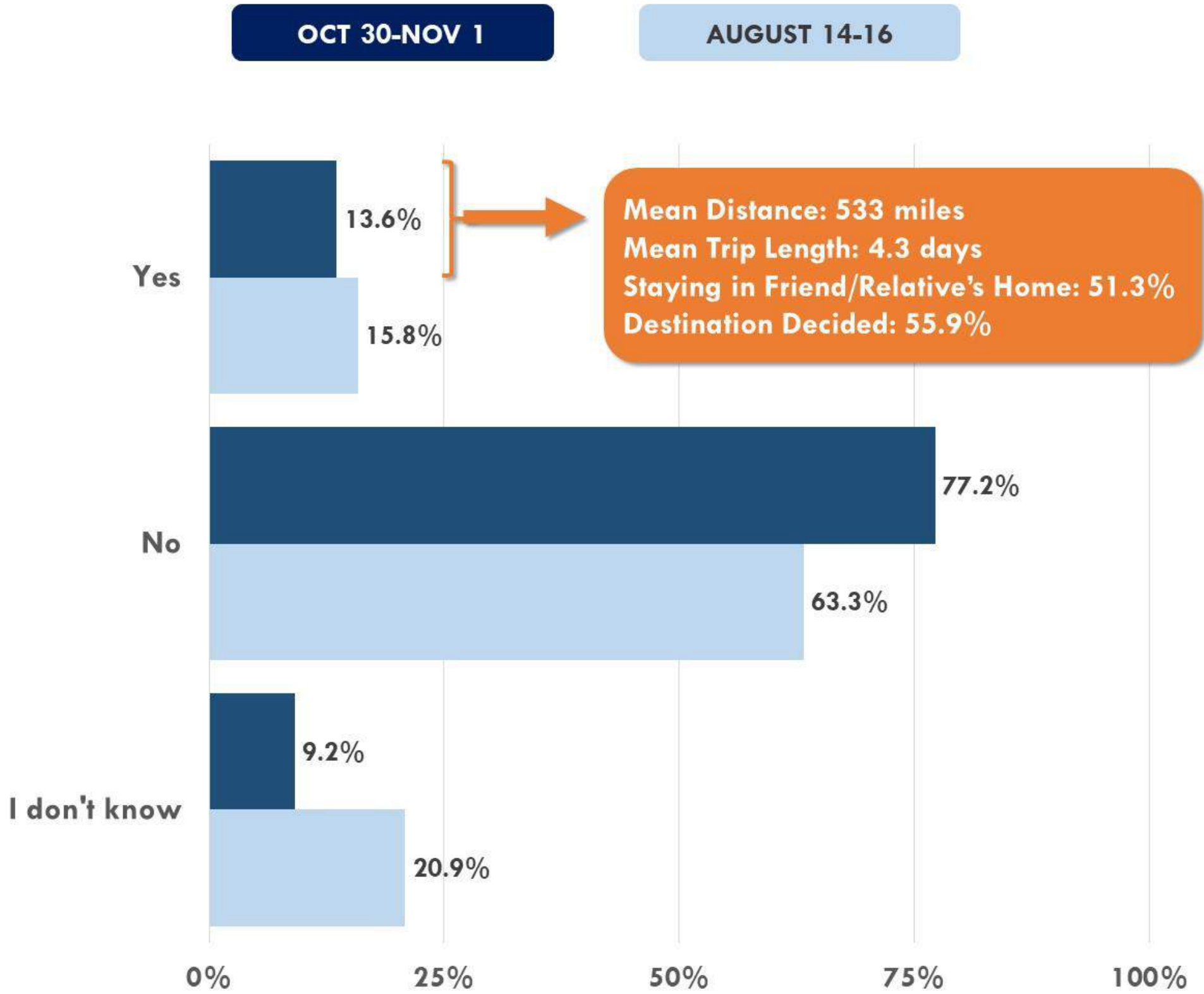
(Base: Wave 34 data. All respondents, 1,203 completed surveys. Data collected Oct 30-Nov 1, 2020)

Expected Thanksgiving Travel

The declining sentiment towards travel has affected behavior, as well, including for the upcoming Thanksgiving holiday. The percent with any trip plans declined to 72% from 75%. While 13.6% definitively say they will travel for Thanksgiving this year--down slightly from 15.8% the week of August 17th, those that felt uncertain in August **have largely moved to “no” for Thanksgiving trips.**

Of those traveling for the holiday, nearly 80% describe this as trips taken primarily to spend time with friends and family in their homes. The mean distance traveled will be 533 miles, although two-thirds will travel less than 500 miles. The average reported trip length will be 4.3 days. While half will stay in the home of a friend or relative, about 18% say they will stay in a luxury hotel property and another 18% plan to stay in a 3 or 4-star hotel. These travelers report they will gather with an average of 5.7 people for their Thanksgiving celebration.

EXPECTED THANKSGIVING TRAVEL AS OF NOVEMBER 1ST



Question: Will you be traveling over the Thanksgiving holiday (50 miles or more from your home) this year?

(Base: Waves 23 and 34. All respondents, 1,202 and 1,203 completed surveys.)

Future Travel Priorities (Next 2 Years)

However, given travel’s importance to Americans, it continues.

This week, fewer agree that they have lost their interest in/taste for traveling for the time being (down to 42.4% from 46.6%). Americans travel readiness state-of-mind remained stable (54.6%), as did the proportion that say they will engage in travel avoidance until the coronavirus situation is more resolved (54.7%). There is also a declining need for a vaccine to travel (39.5%).

As to how the pandemic has shifted priorities and the way this will potentially impact travel in the longer term, this week we asked Americans “As you look out over the next two years, in which ways (if at all) do you expect your travel priorities will change compared to BEFORE the Coronavirus situation?” The most agreement was shared that they would be traveling more domestically/seeing the United States and traveling more with family. Nearly a quarter say they will be visiting more destinations on their bucket list and saying yes to new travel ideas and experiences.

FUTURE TRAVEL PRIORITIES (NEXT 2 YEARS) AS OF NOVEMBER 1ST



TRAVELING MORE DOMESTICALLY
(33.4%)



TRAVELING MORE WITH MY FAMILY
(31.2%)



VISITING MORE NATIONAL PARKS AND PUBLIC LANDS
(26.4%)



VISITING MORE DESTINATIONS ON MY BUCKET LIST
(23.9%)



BEING MORE OPEN TO NEW TRAVEL IDEAS
(23.6%)



TRAVELING MORE INTERNATIONALLY
(19.5%)



TRAVELING MORE WITH FRIENDS
(19.2%)



VISITING ICONIC AMERICAN CITIES
(16.7%)

Question: As you look out over the next two (2) years, in which ways (if at all) do you expect your travel priorities will change compared to before the coronavirus situation? (select all that complete the sentence)

In the next two (2) years, I will be _____.

(Base: Wave 34 data. All respondents, 1,203 completed surveys. Data collected Oct 30-Nov 1, 2020)



Coronavirus Travel Sentiment Index

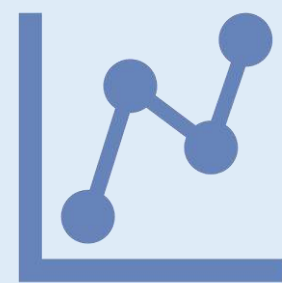
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 2nd

What is a Predictive Index?



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



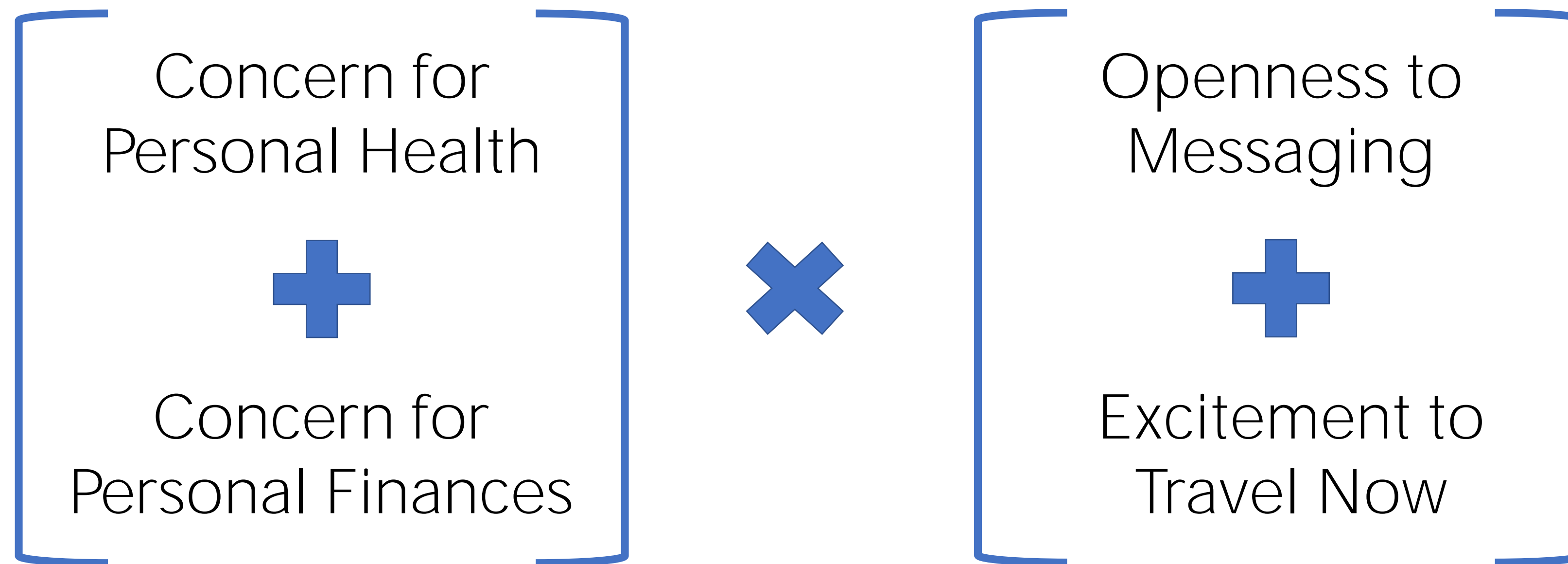
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

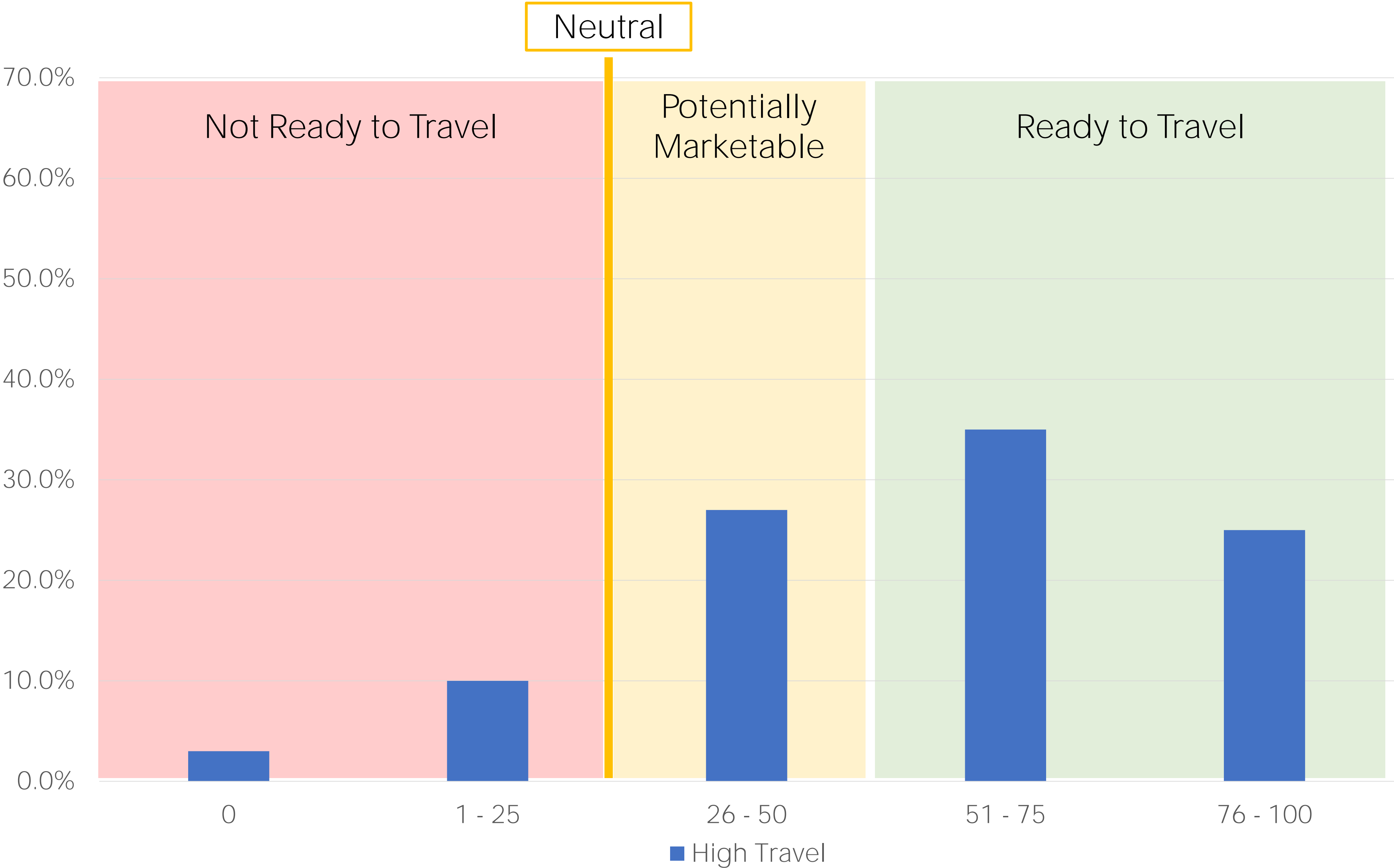
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



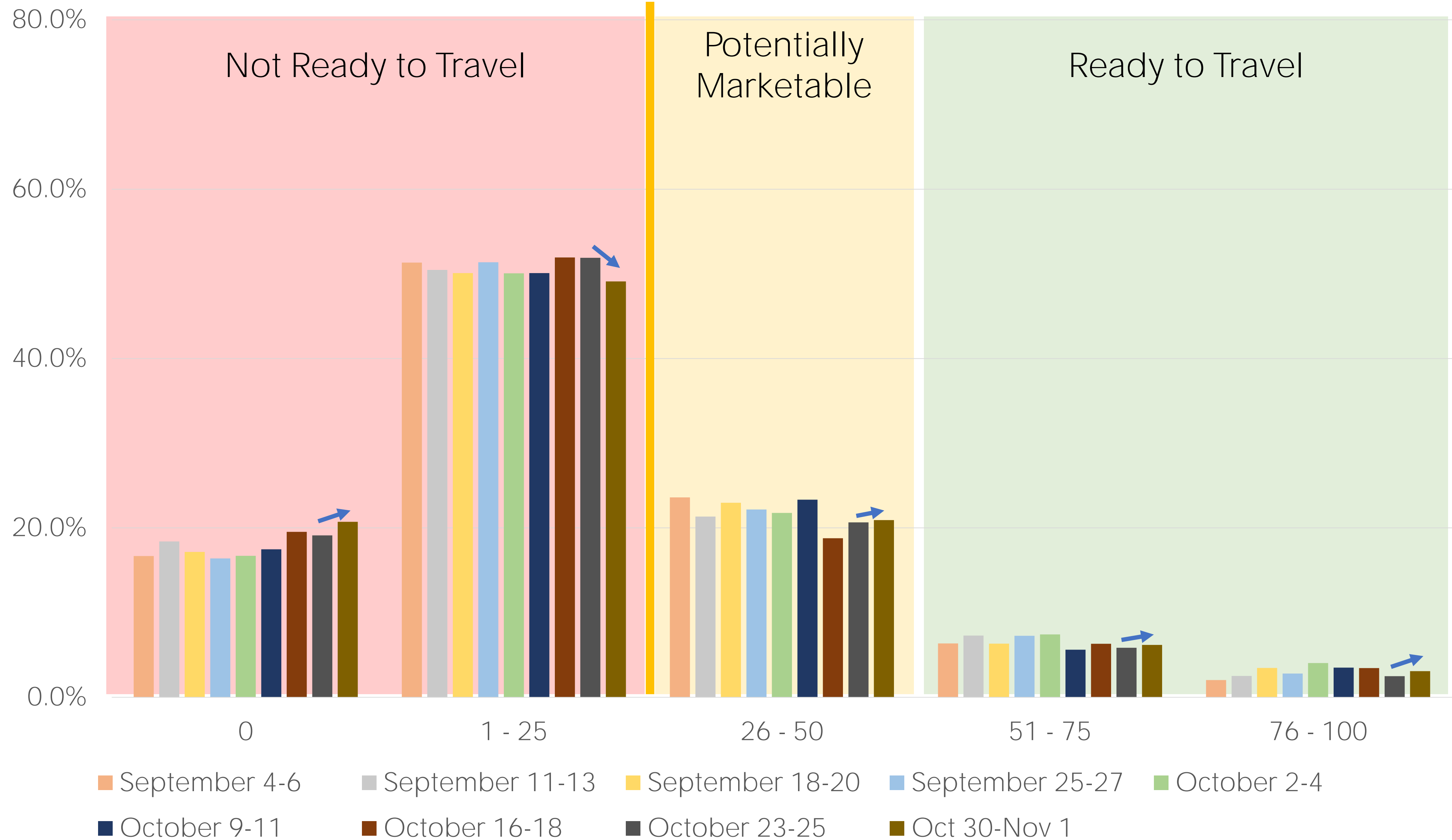
*Normalized to a 100pt scale

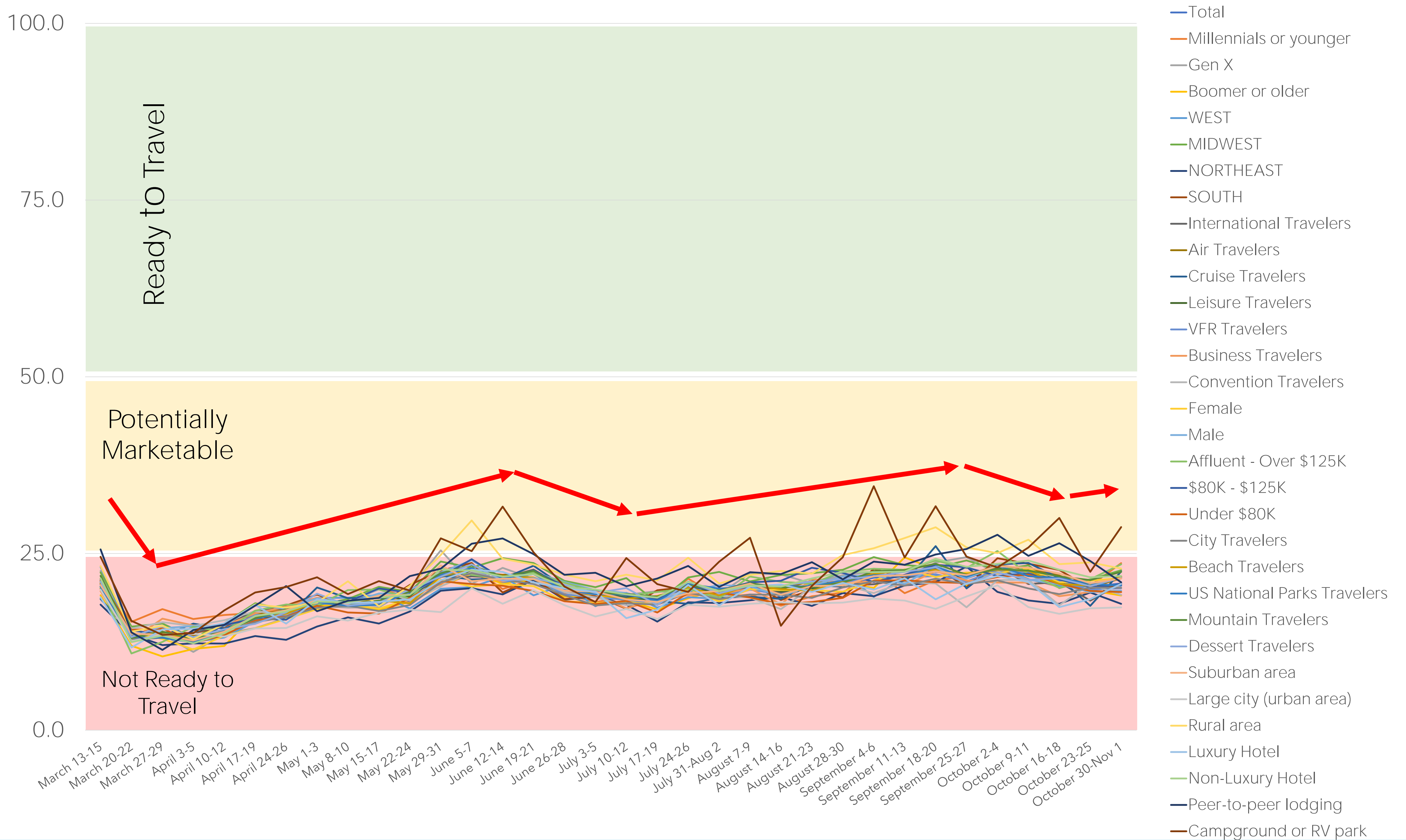
Healthy Travel Outlook

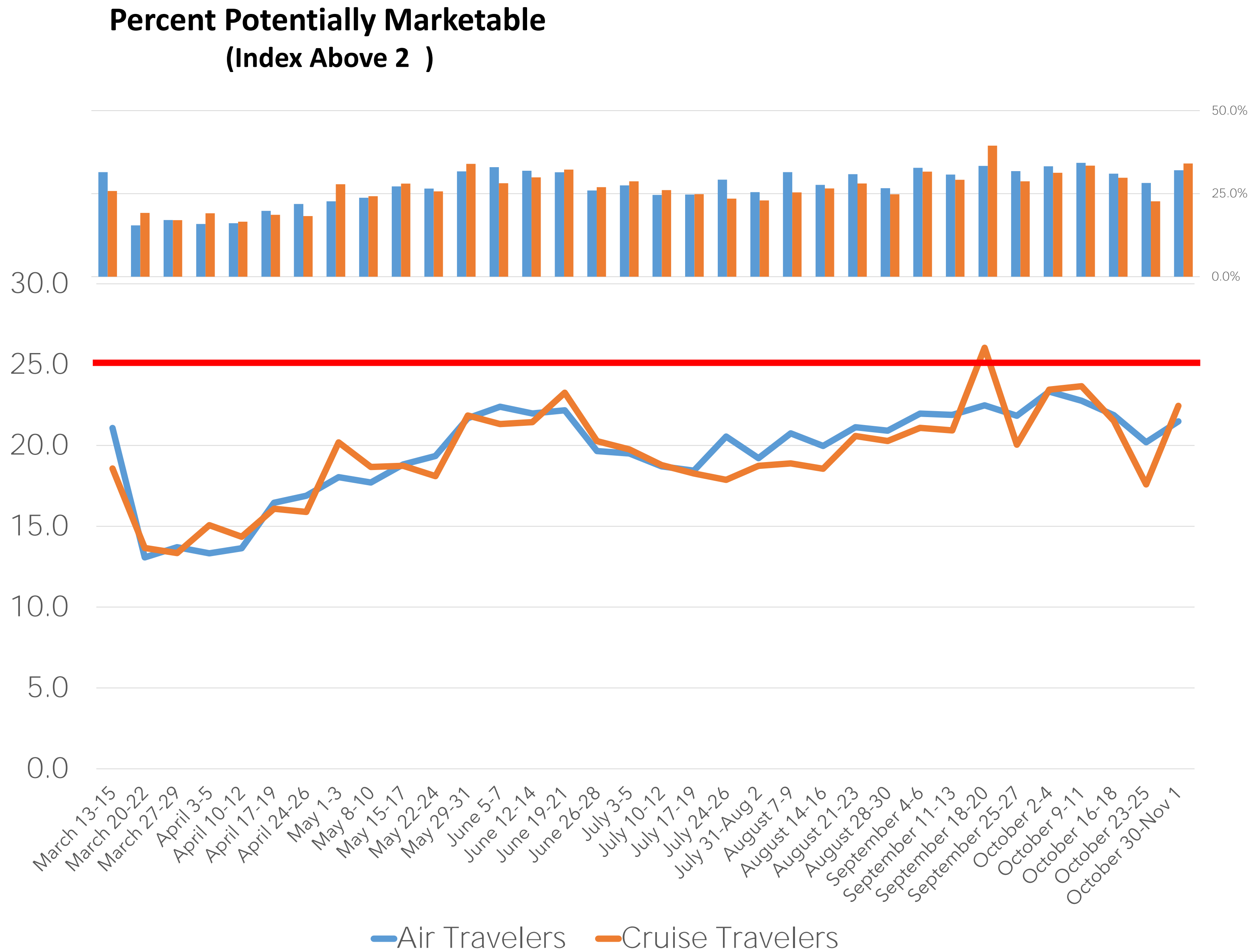
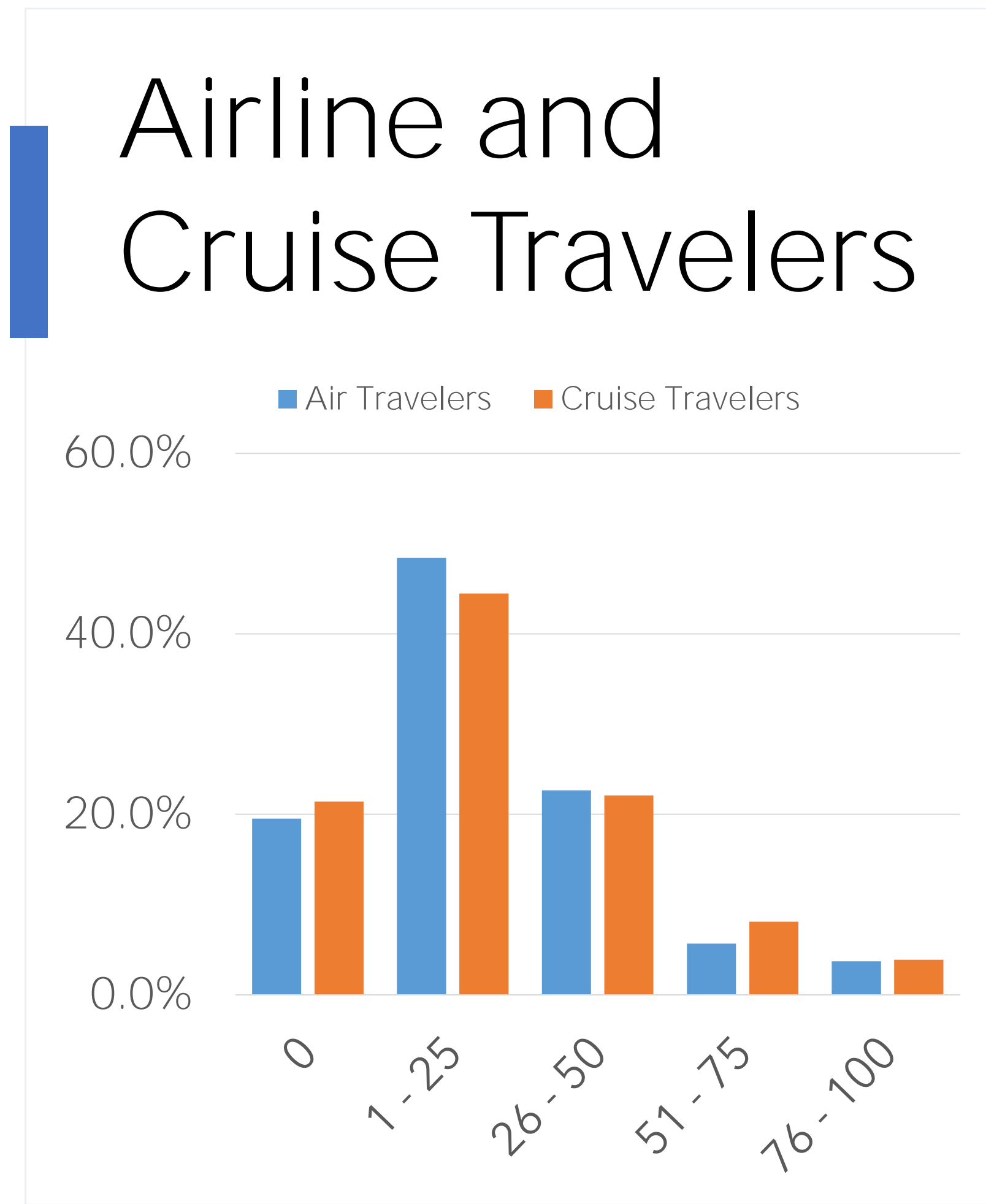


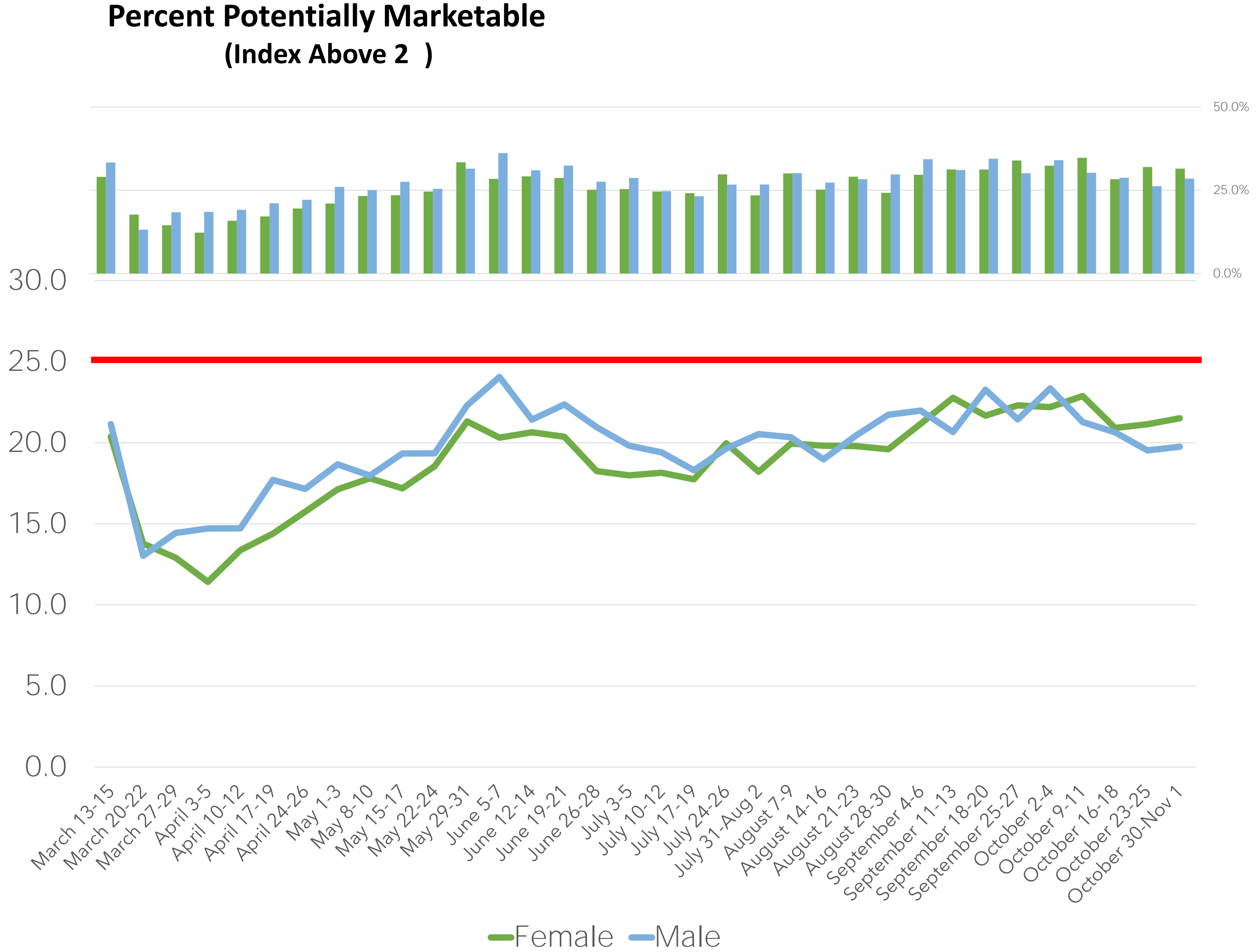
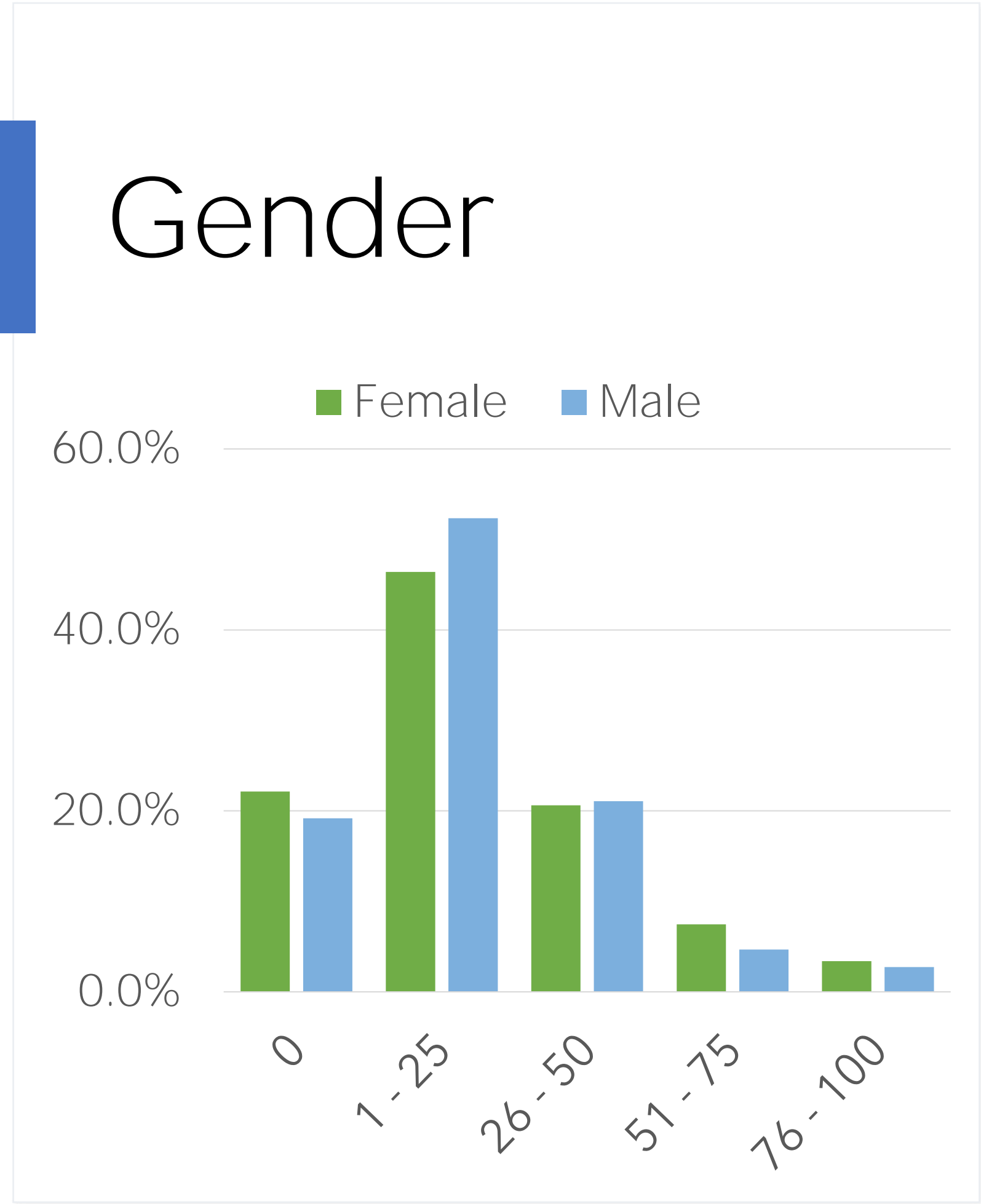
Travel Outlook

Neutral







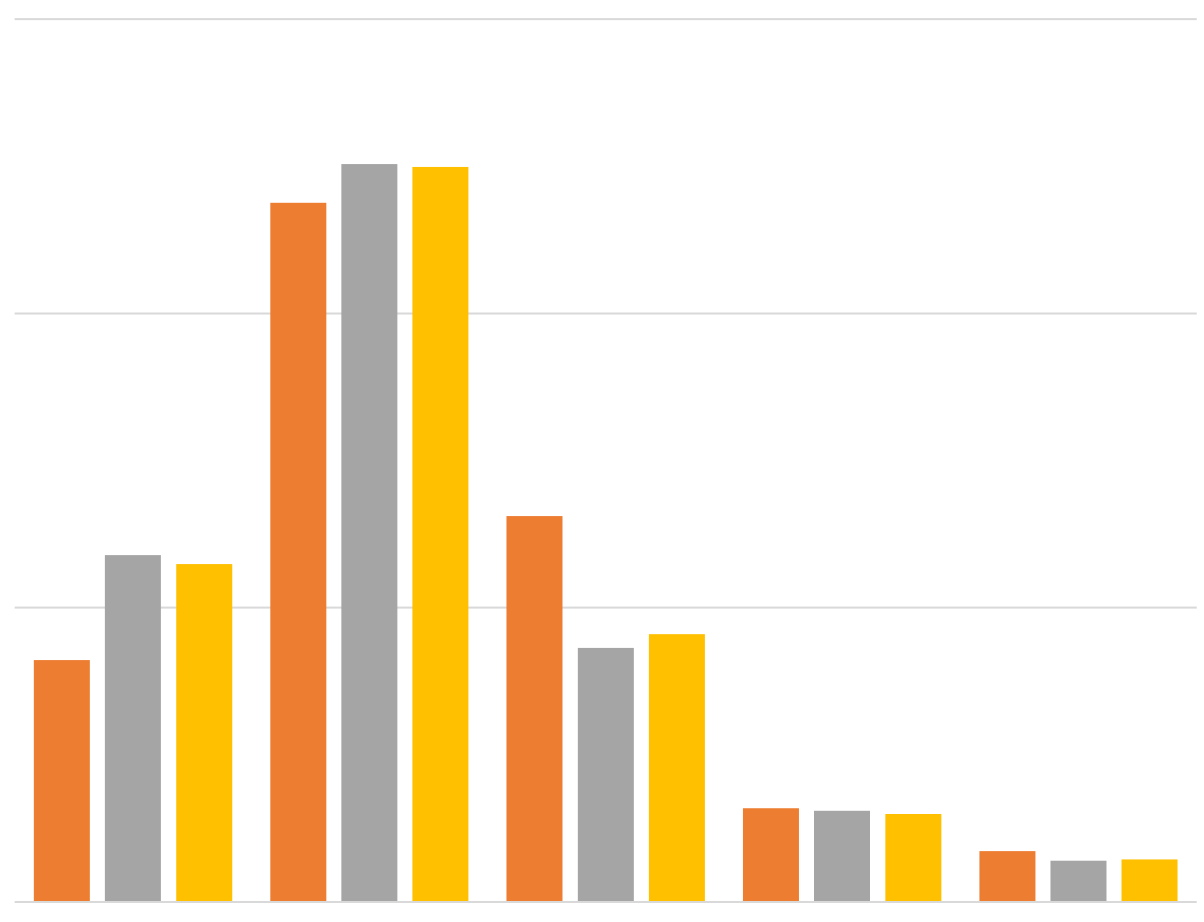


Generation

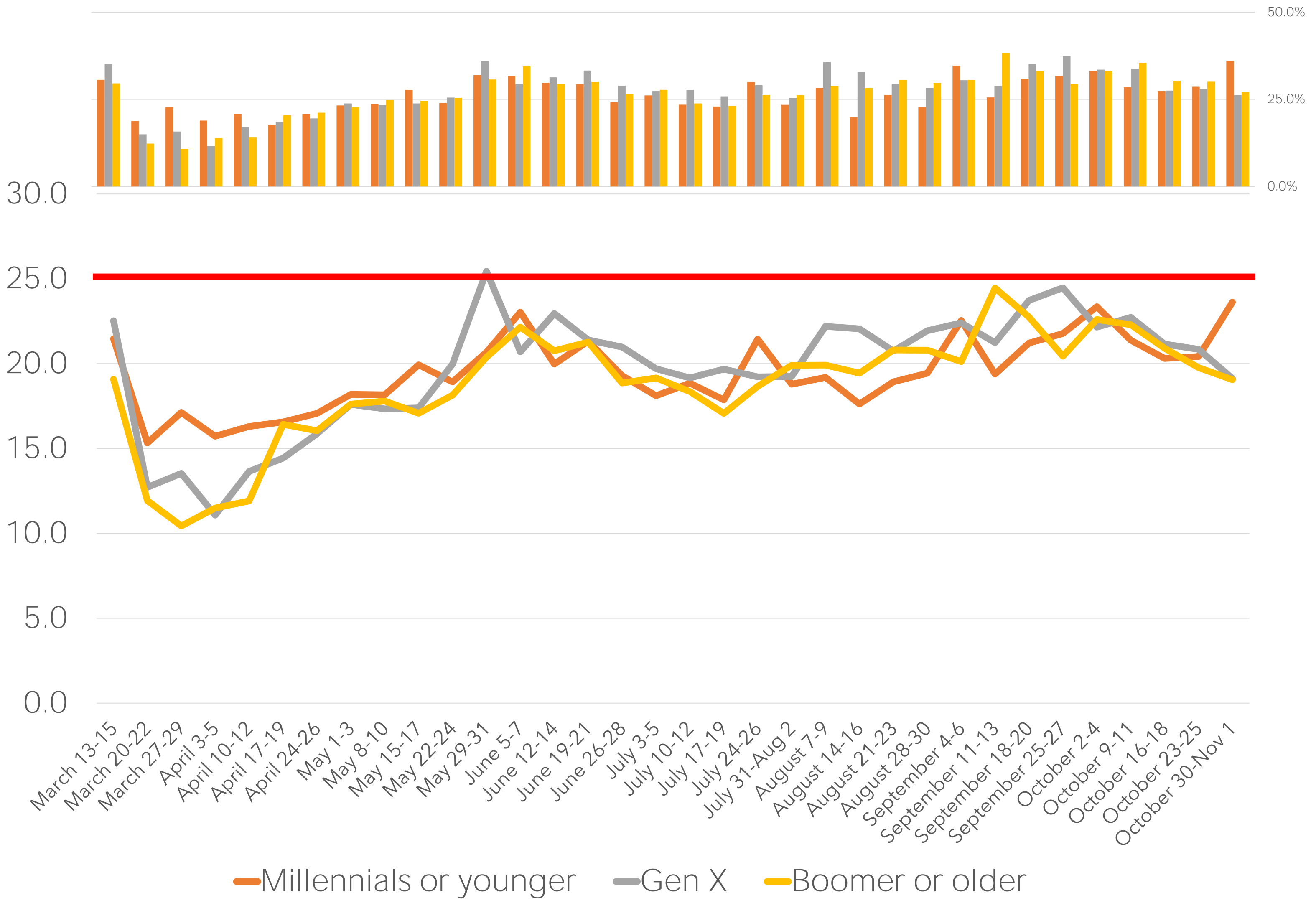
Millennials or younger Gen X Boomer or older

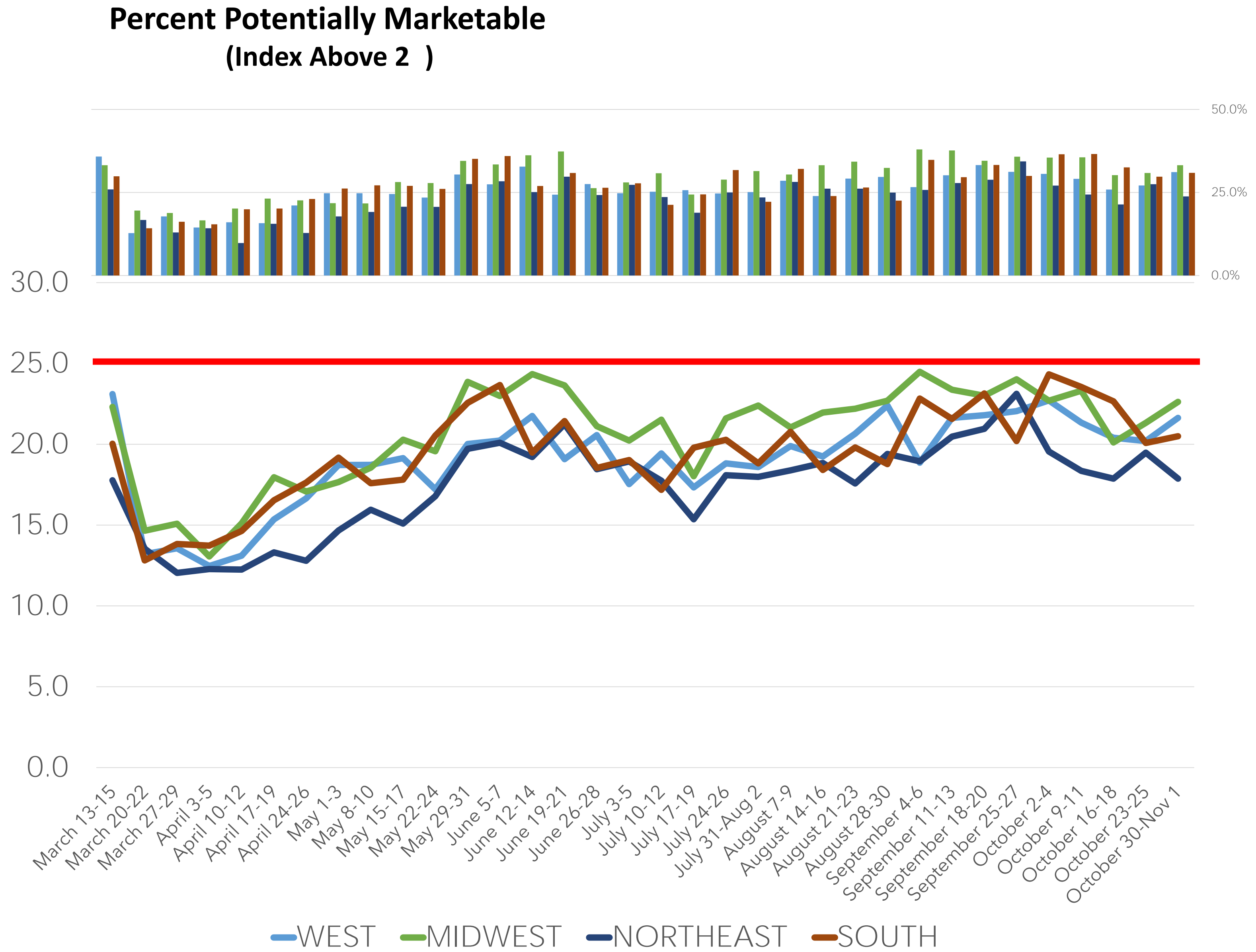
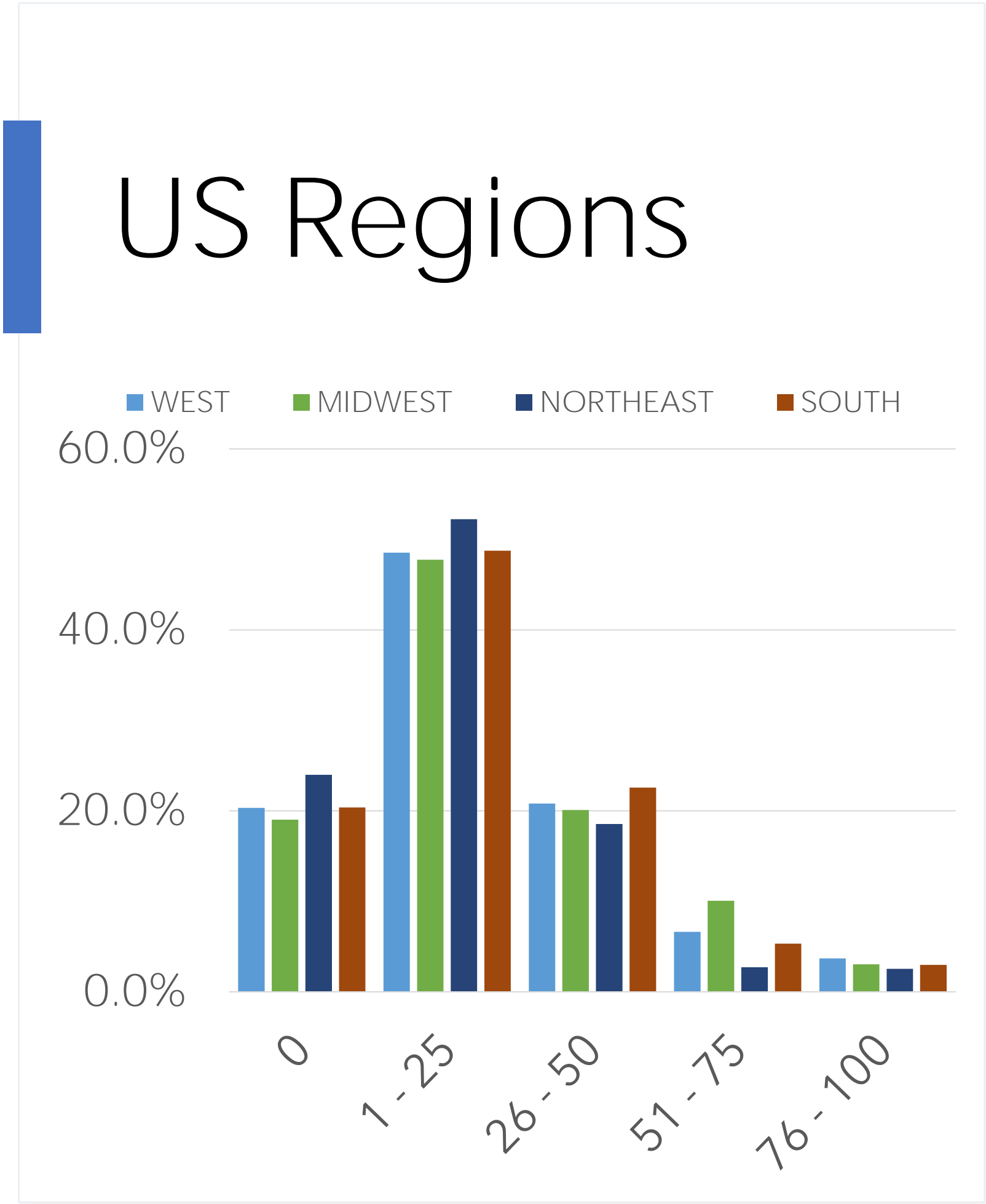
60.0%
40.0%
20.0%
0.0%

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



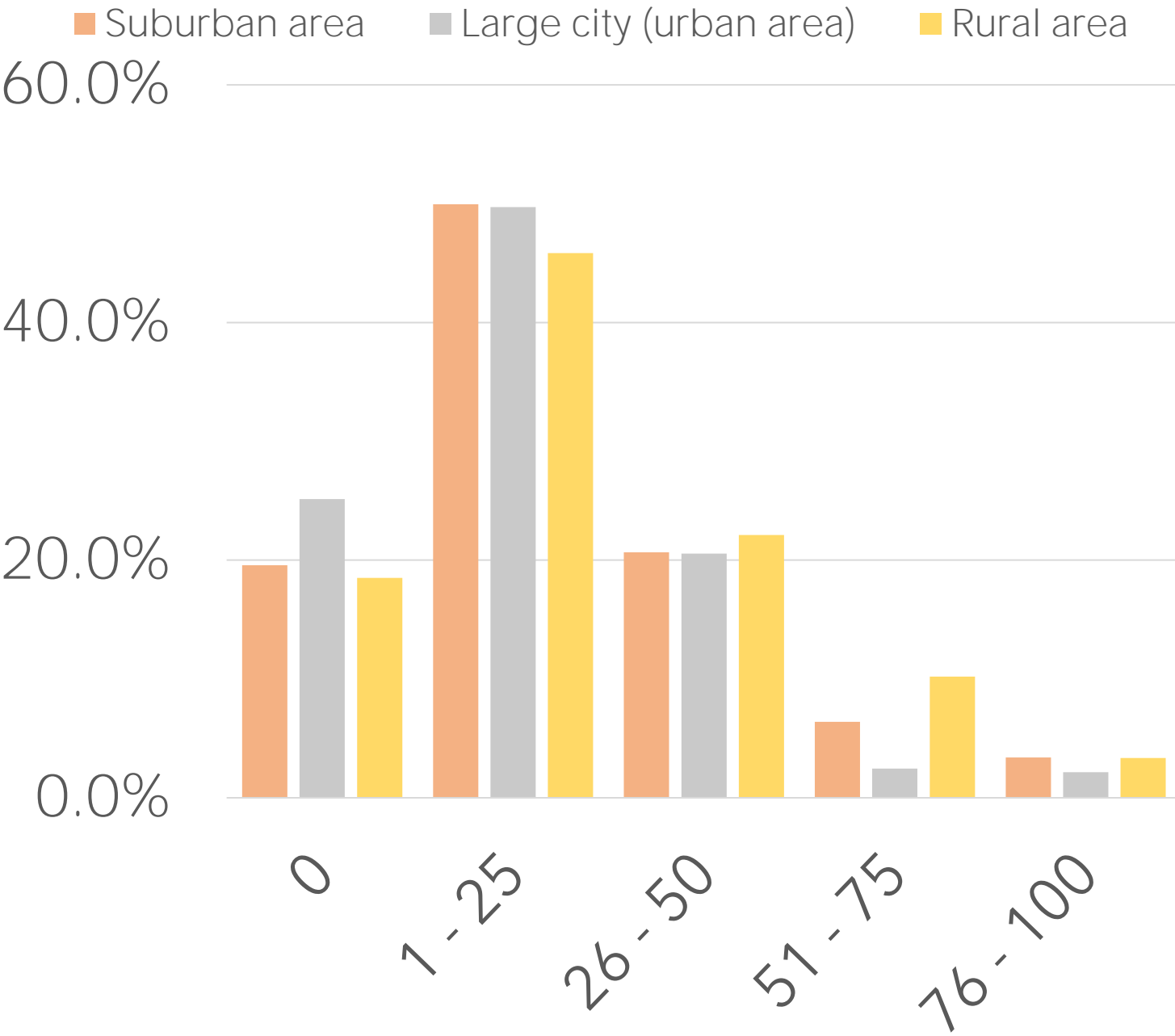
Percent Potentially Marketable (Index Above 2)



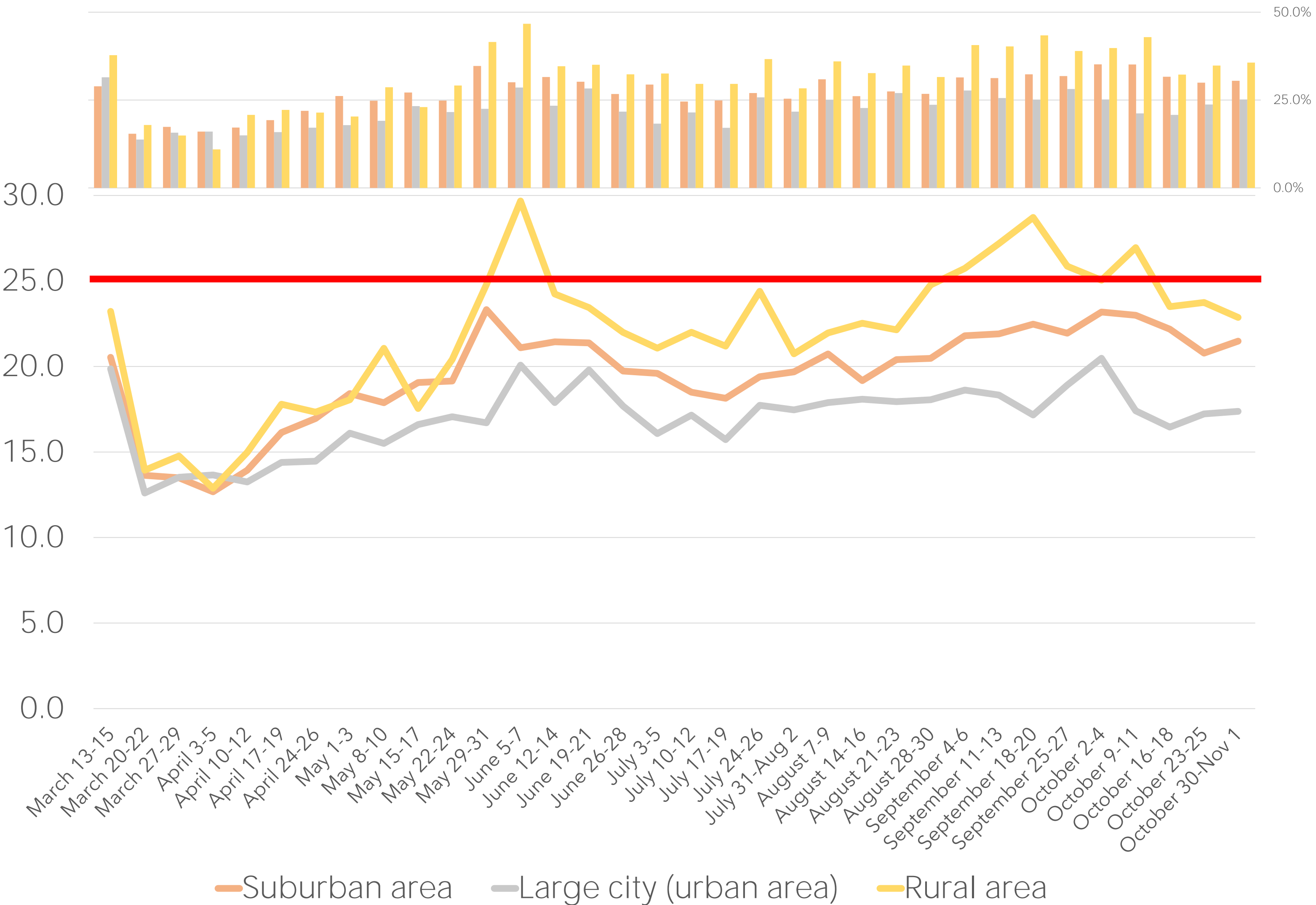




Residence Type



Percent Potentially Marketable (Index Above 2)



Lodging Preference

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

60.0%

40.0%

20.0%

0.0%

0

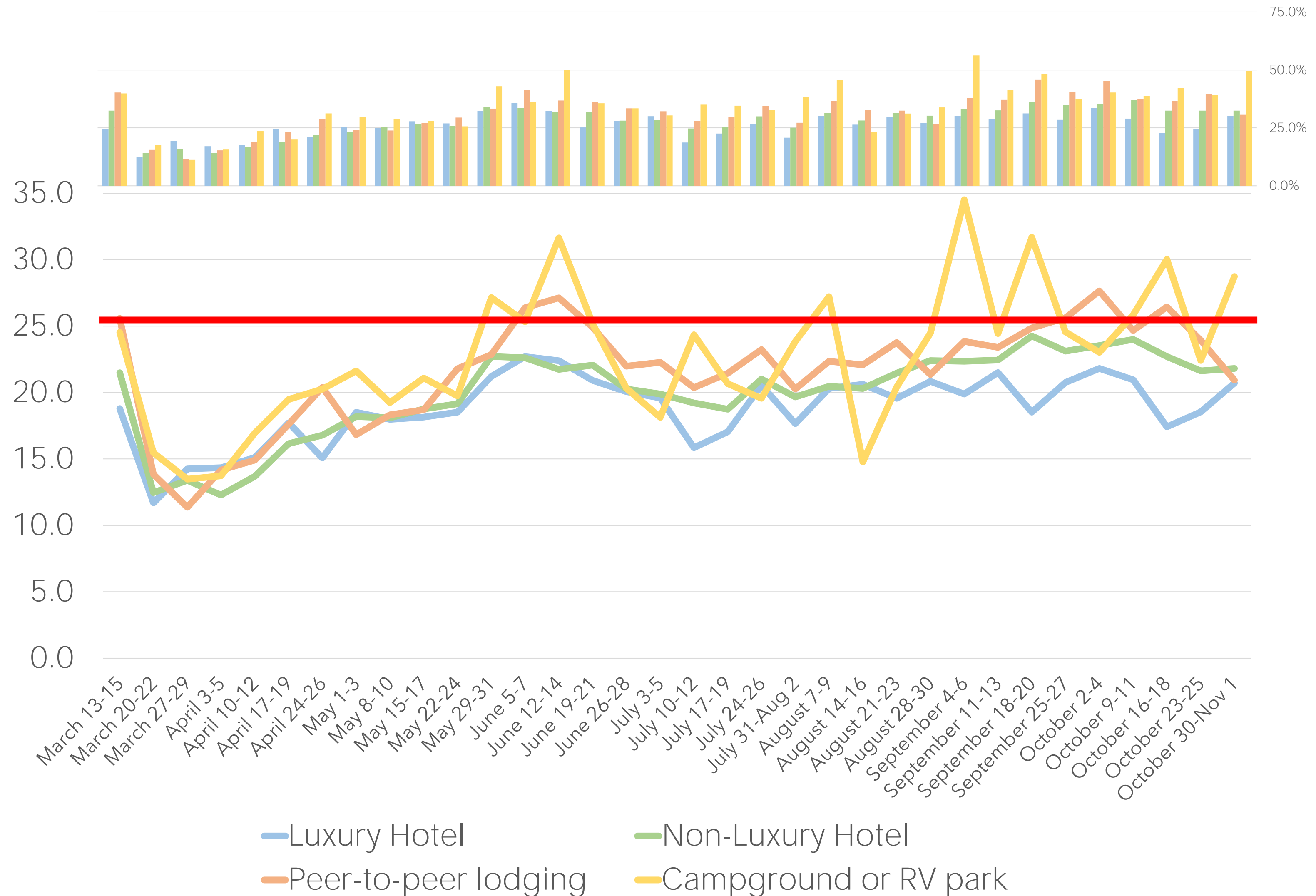
1 - 25

26 - 50

51 - 75

76 - 100

Percent Potentially Marketable (Index Above 2)





Questions?
Need More
Information?

- We're here for you. Please email us at info@destinationanalysts.com.
- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>

15-minute presentations for your board and stakeholders

info@destinationanalysts.com



We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

info@destinationanalysts.com

