The Travel Bubble Concept
Insights from Traveling Consumers
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.
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 23 data (fielded August 14\textsuperscript{th}-16\textsuperscript{th}) 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
UPDATE
How Americans Feel about Travel
Key Findings

• Pandemic-related health and financial safety concerns have dropped to levels last seen in mid-June. Although there are still notable levels of pessimism, less Americans are feeling the pandemic will worsen in the next month.

• These increasing feelings of safety are driving more positivity about tourism. Americans are feeling safer engaging in leisure activities at home, as the proportion of American travelers who feel comfortable going out in their own community now exceeds the proportion who do not. The percent of Americans who report being in a “ready to travel” state of mind is now higher than those who report needing more time to feel ready.
Key Findings

• Travel is being prioritized in entertainment and leisure spending

• As Americans look out over upcoming holidays, there is a gradual expectation to travel for these occasions. Looking out further through 2021, three-quarters of Americans have at least tentative trip plans right now.
Key Findings

• Safety concerns about travel still remain abnormally high

• The crisis looks to have a pesky, lingering impact for destination brands, as a third of Americans say they will avoid destinations perceived to be virus hot-spots post pandemic

• American are quite conscious of and wary of other travelers’ behaviors— influencers their travel decisions and possibly deterring travel. 75% say fellow passengers behaviors is the most unsafe aspect of air travel right now, and convention travelers’ trust in their fellow attendees to behave in a way that minimizes the virus’ spread has decreased to less than 60%.
Feelings about Domestic Travel Restrictions
Opinions on State Travel Restrictions

**Question:** Some U.S. States are requiring that travelers from high-risk states take action such as showing a negative COVID-19 test or opting to self-quarantine for 14 days. Which best describes how you feel about these policies? (Select one)

- Strongly approve
- Approve
- Neither approve nor disapprove
- Disapprove
- Strongly disapprove

(Base: Wave 23 data. All respondents, 1,193 completed surveys. Data collected Aug 14-16, 2020)
State Restrictions and Comfort with Travel: Home State

**Question:** If your state put in place (or has already put in place) such restrictions, would this make you more or less comfortable with traveling INSIDE YOUR OWN STATE? (Select one to fill in the blank)

- I would be ______________ traveling inside my own state.

**Top-Two Box by Region**
- Northeast—46.1%
- South—45.3%
- West—34.4%
- Midwest—30.5%

(Base: Wave 23 data. All respondents, 1,196 completed surveys. Data collected Aug 14-16, 2020)

<table>
<thead>
<tr>
<th>Comfort Level</th>
<th>Percentage</th>
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<td>Much more comfortable</td>
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<tr>
<td>More comfortable</td>
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<tr>
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State Restrictions and Comfort with Travel: Other States

**Question:** If a state you want to visit put in place (or has already put in place) such restrictions, would this make you more or less comfortable visiting that state?

I would be ____________________ visiting that state.

(Base: Wave 23 data. All respondents, 1,191 completed surveys. Data collected Aug 14-16, 2020)

**Top-Two Box by Region**
- South—35.3%
- Northeast—32.1%
- Midwest—27.2%
- West—26.7%
Approve vs Disapprove Profiles
Disapprove

- 13% of American travelers
- Exceptionally optimistic about the coronavirus situation and have lower levels of personal concern
- Already traveling or ready to—have plans to travel in the near-term
- Less likely to have children under age 18
Approve

• The majority of American travelers (62%)

• Higher levels of concern about the virus. Greater feelings of anxiety about the safety of travel. Adapting travel behaviors with more caution

• These policies look to potentially have a positive impact on their in-state and out-of-state travel
Key Takeaways

• A majority of American travelers approve of travel restriction policies imposed by state governments on travelers from high outbreak areas.

• With ongoing heightened safety concerns and wariness of other travelers’ behaviors, these domestic travel restrictions appear to have a net positive impact on in-state travel.

• Those who reside in the Northeast are most approving of such travel restrictions and also express the highest level of comfort traveling in-state if their own state put restrictions in place. The West appears least comfortable now.
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