



**Destination Analysts Coronavirus Travel Sentiment**  
**- Key Findings for the Week of August 16th**

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# Expectations for the Coronavirus Outbreak

This week, Americans report feeling safer in a number of areas that affect their travel feelings and behaviors.

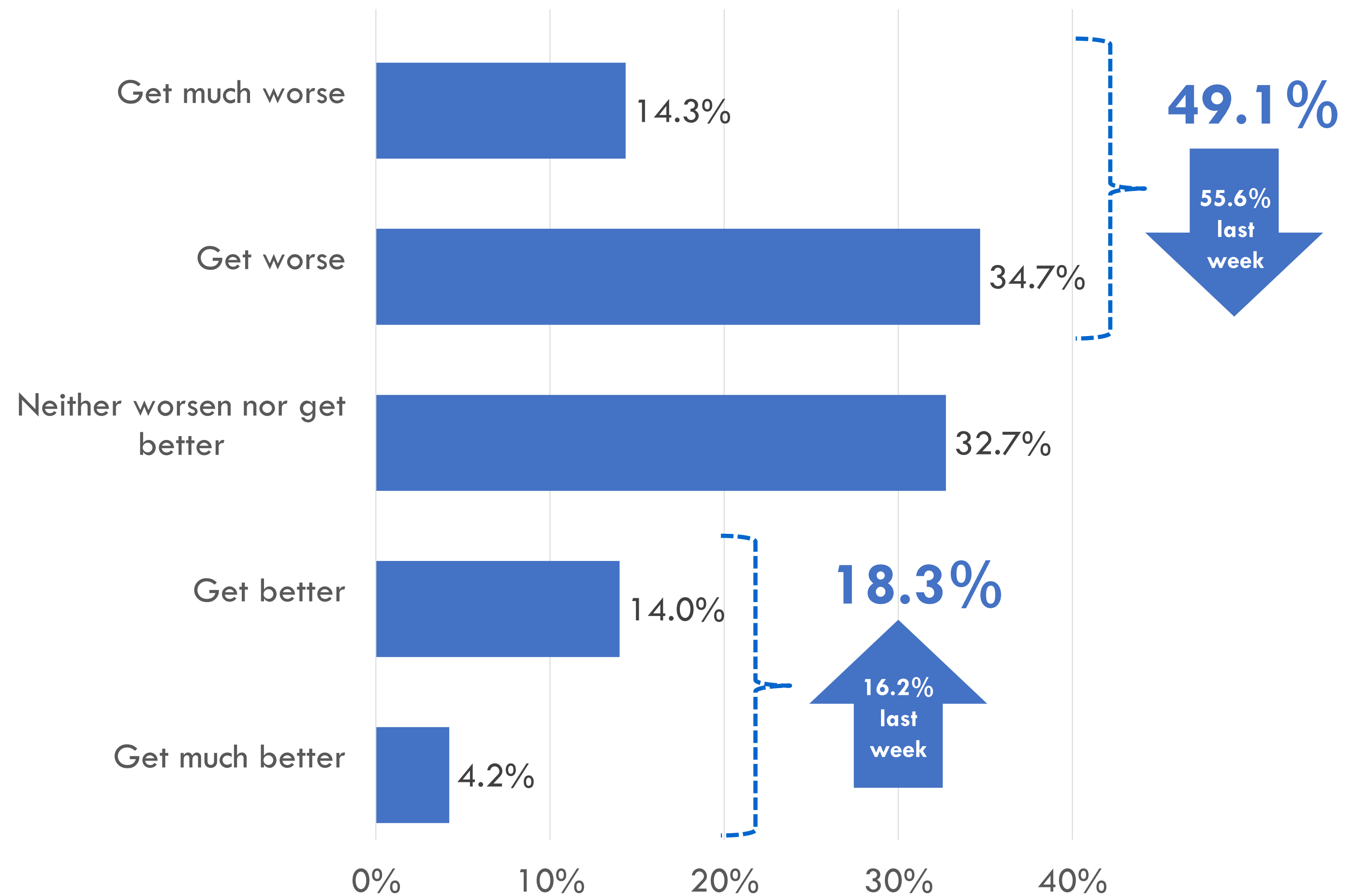
Pandemic-related health and financial safety concerns have dropped to levels last seen in mid-June. **Although there are still notable levels of pessimism, less Americans are feeling the pandemic will worsen in the next month.**

**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 23. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

**PERCENT DESCRIBING EXPECTATIONS FOR THE SEVERITY OF THE CORONAVIRUS SITUATION IN THE NEXT MONTH**

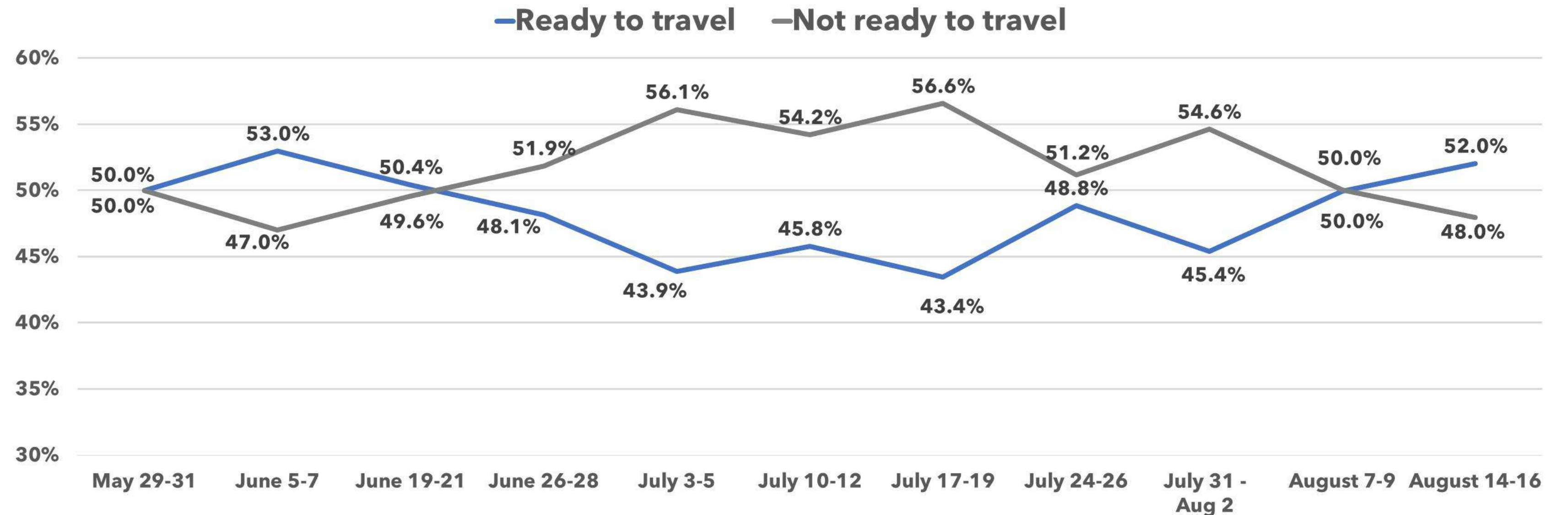


# Americans' Travel State-of-Mind (Waves 12-13 and 15-23 Comparison)

Safety perceptions of travel activities have improved overall, nearing June levels. Staycation-ing and the avoidance of conferences and group meetings have declined. **Given all these sentiments, 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.**

## AMERICANS' TRAVEL STATE-OF-MIND MAY 29—AUGUST 16

**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 15-23. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collection May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, 2020)*

# Upcoming Holiday Travel Expectations

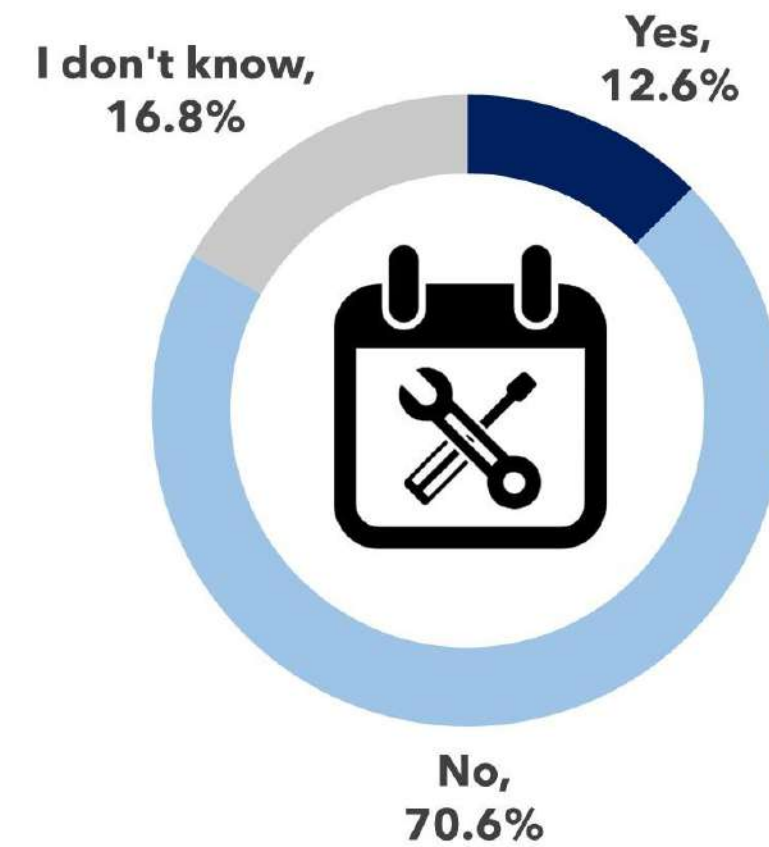
As Americans look out to upcoming holidays, there is a gradually increasing expectation to travel for these occasions: Labor Day (12.6%), Thanksgiving (15.8%) and Christmas (20.0%).

Looking even further out over 2021, three-quarters of Americans have at least tentative trip plans right now. Just 25% say they have no plans to travel through 2021.

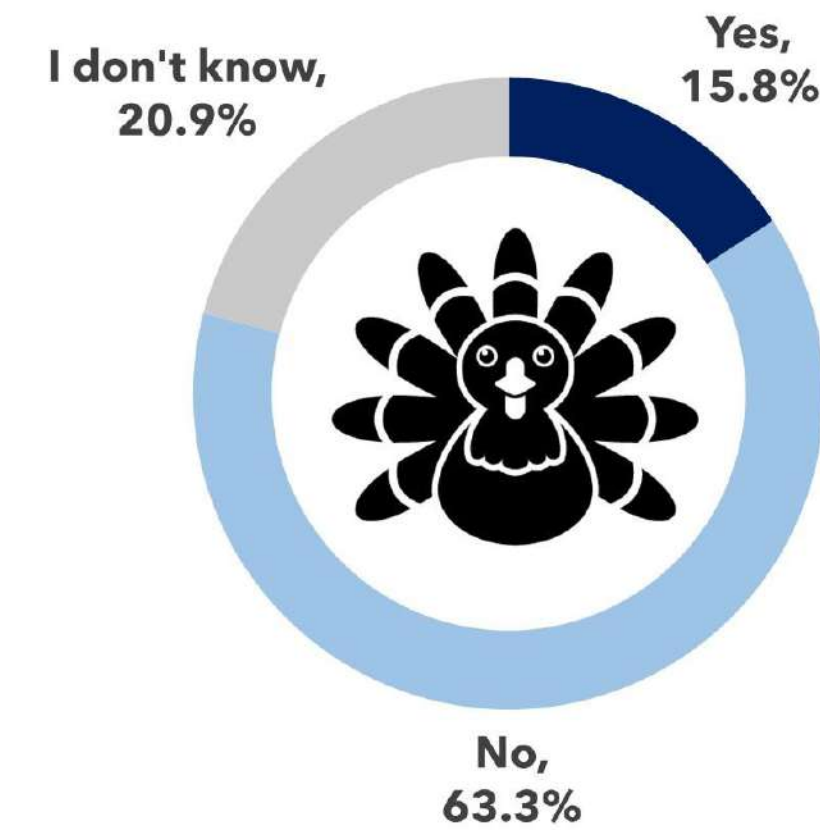
## UPCOMING HOLIDAY TRAVEL EXPECTATIONS

AS OF AUGUST 16<sup>TH</sup>, 2020

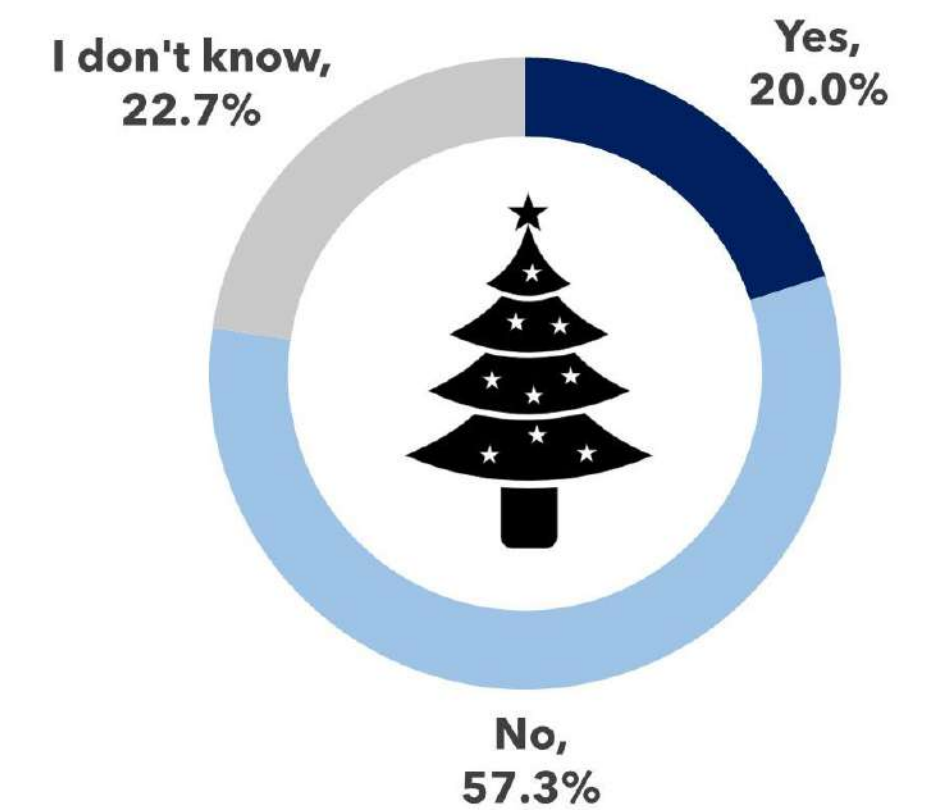
### LABOR DAY



### THANKSGIVING



### CHRISTMAS



**Questions:** Will you be traveling over the [Holiday] this year?

(Base: Wave 23. All respondents, 1,221 completed surveys. Data collected August 14-16, 2020)

# Trip Experiences Traveling Americans Will Prioritize this Year

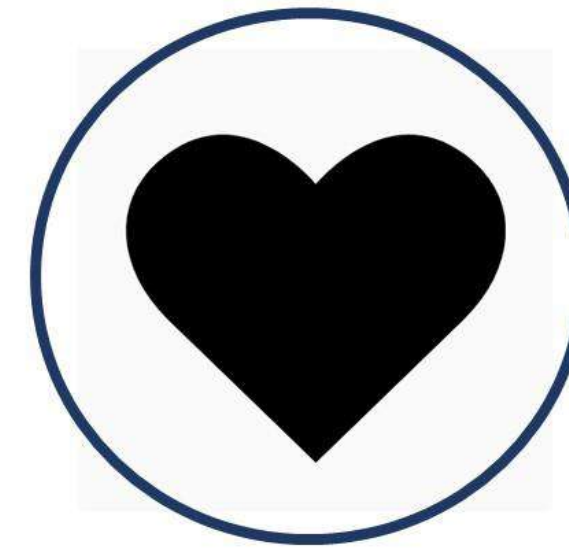
Those with trip plans for the remainder of the year are commonly prioritizing getting away from crowds and enjoying nature, in addition to spending time with loved ones. However, there is also an important proportion who are prioritizing experiencing new places and excitement in their travel.

**Question:** Thinking about your travel during the rest of the year, what travel experiences will you prioritize? However you personally define each, use the scale provided to indicate how you will prioritize them.

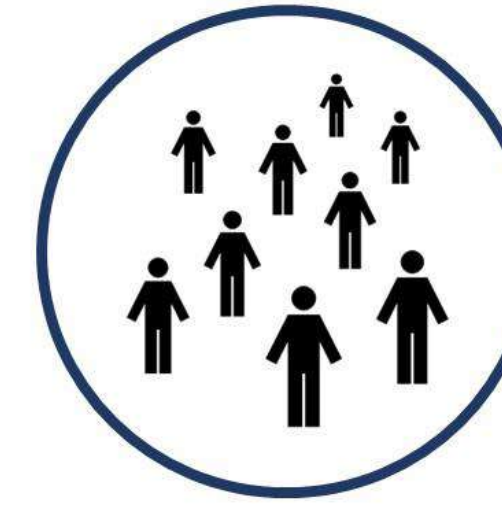
(Base: Wave 23. Respondents planning to travel for leisure later in 2020. 432 completed surveys. Data collected August 14-16, 2020)

## TRIP EXPERIENCES TRAVELING AMERICANS WILL PRIORITIZE THIS YEAR

AS OF AUGUST 16<sup>TH</sup>, 2020



SPENDING TIME WITH LOVED ONES  
(68.1%)



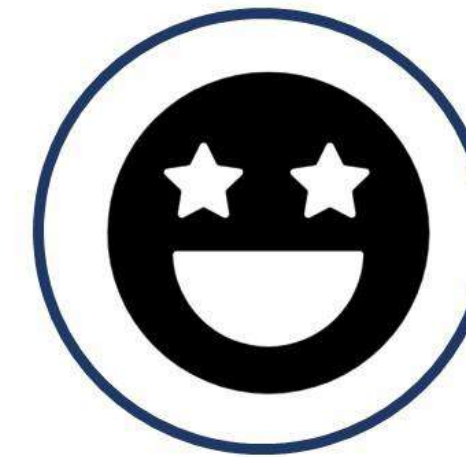
GETTING AWAY FROM CROWDS  
(57.6%)



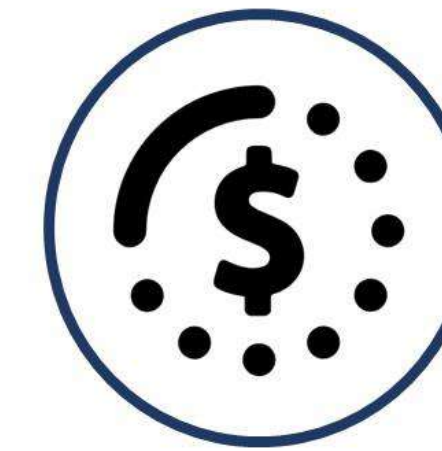
ENJOYING NATURE  
(53.1%)



NEW PLACES I HAVEN'T VISITED BEFORE  
(37.8%)



EXCITEMENT AND ENERGY  
(36.6%)



BUDGET TRAVEL  
(33.4%)



STAYING CLOSE TO HOME  
(33.1%)



BUCKET LIST TRAVEL  
(27.8%)



LUXURY TRAVEL  
(24.4%)



VISITING CULTURAL INSTITUTIONS  
(24.1%)



VISITING THEME PARKS  
(22.1%)

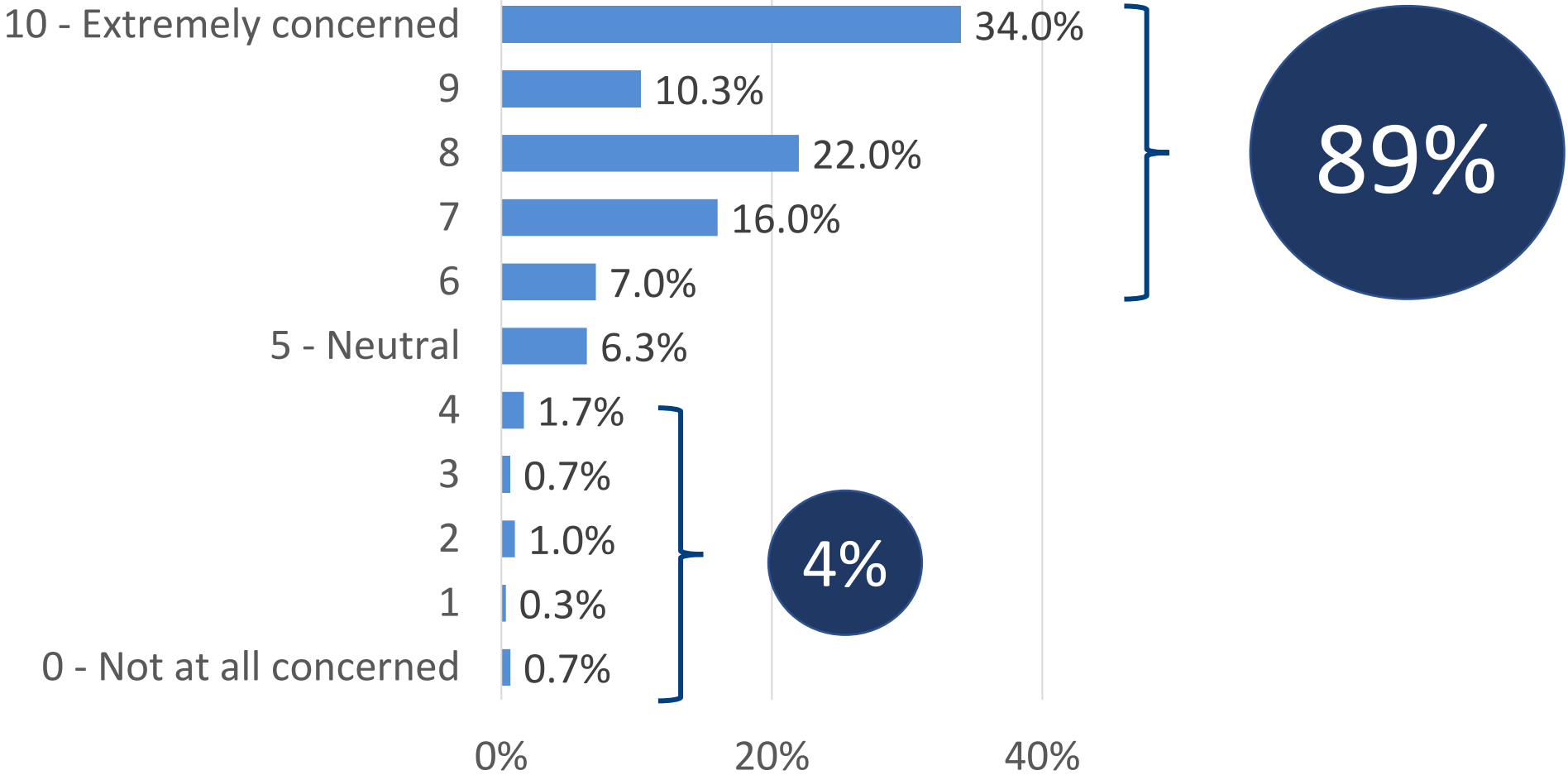


VISITING LARGE CITIES  
(20.9%)



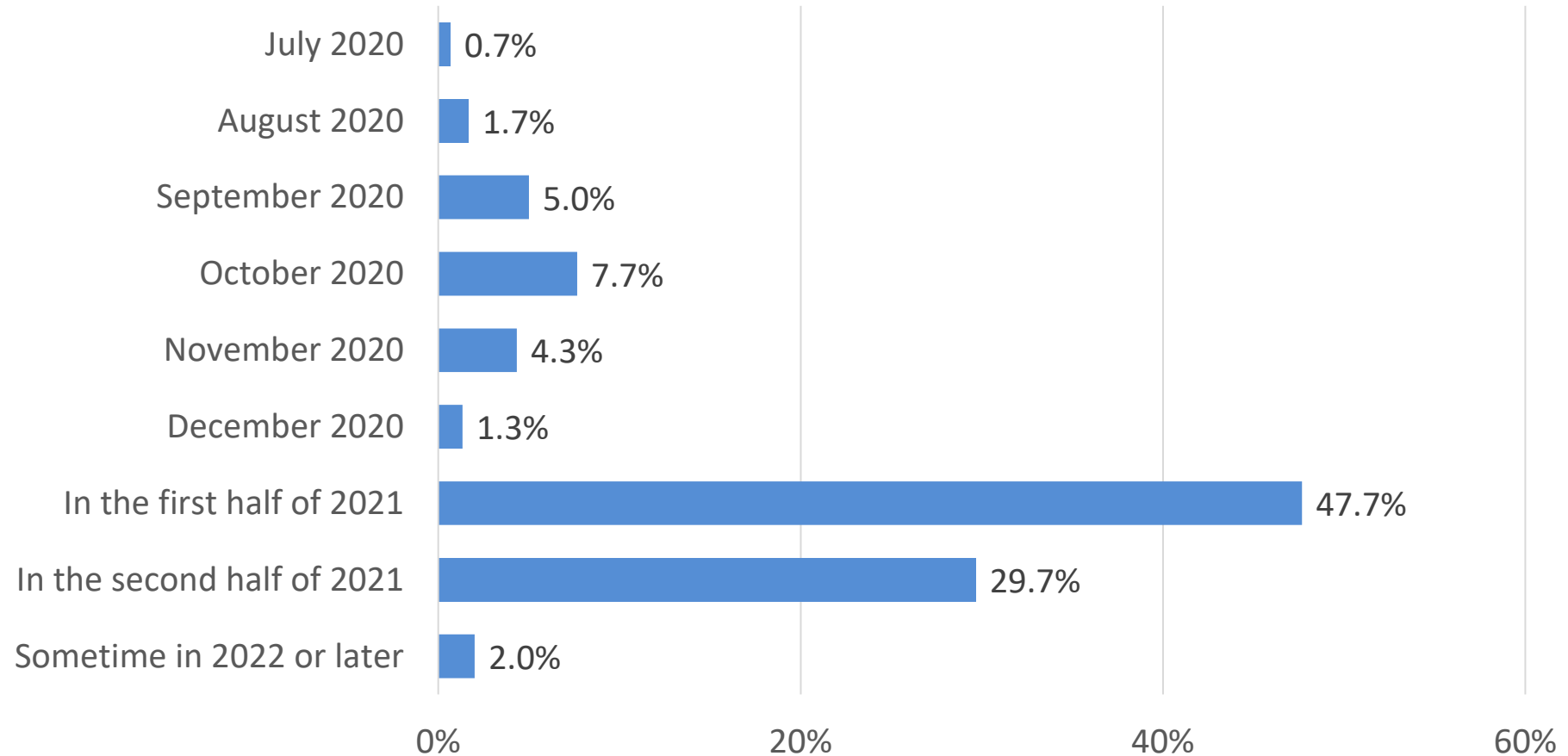
ATTENDING SPORTING EVENTS  
(17.8%)

# CONCERN ABOUT INDUSTRY'S RECOVERY



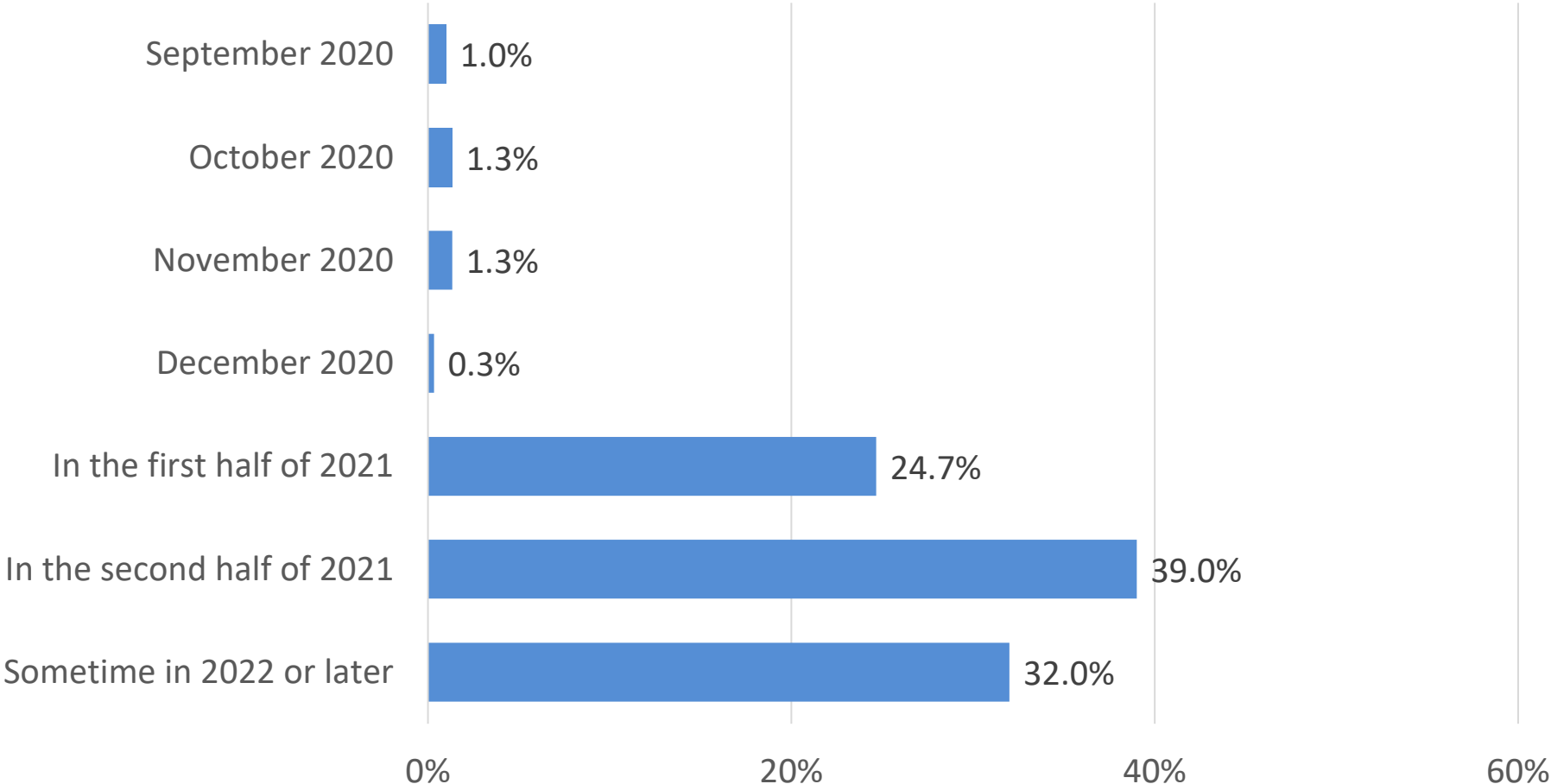
Question: Thinking about the current coronavirus situation, how concerned are you about the meetings industry recovering within the next twelve months? (Please answer using the scale below) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

# WHEN LIVE MEETINGS WILL LIKELY RETURN



Question: If you were advising on the timing of holding a live/in-person meeting or event, which month would you say is the soonest they should consider holding their live event? (Select one) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

# WHEN MEETINGS BUSINESS WILL RETURN TO NORMAL

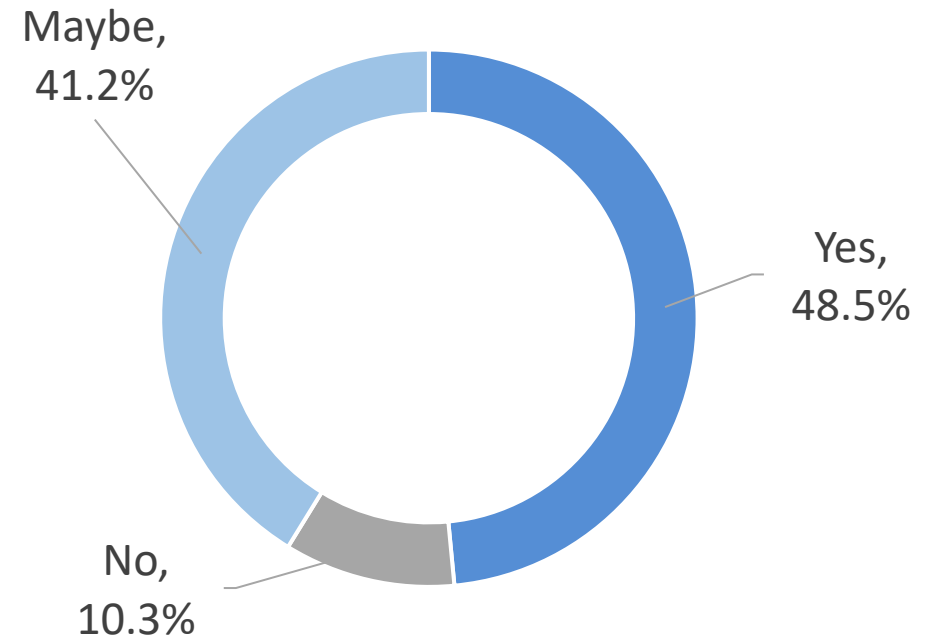
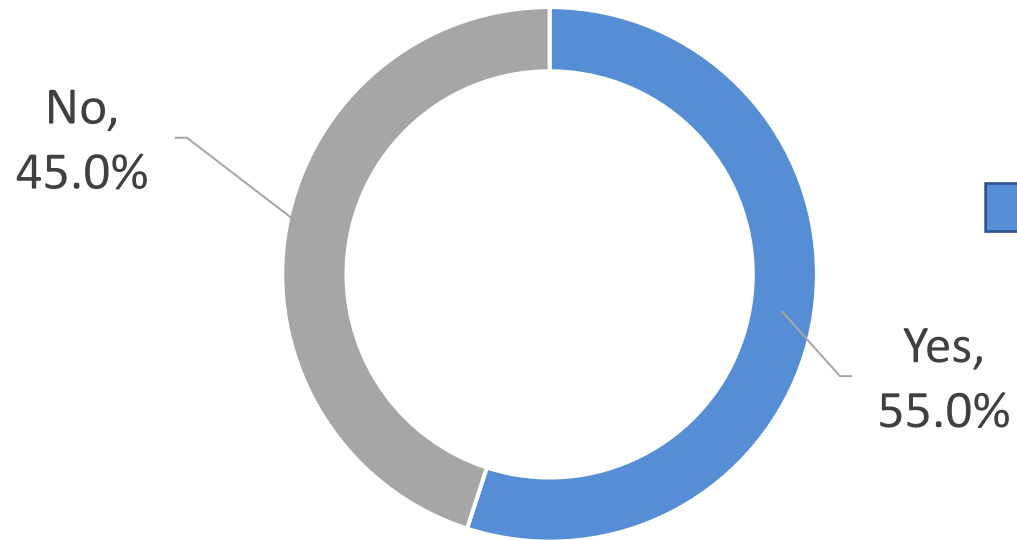


Question: If you had to predict, in which month do you think the meetings and events business will return to normal (or near normal) levels?  
Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



# WORKING EVENTS SCHEDULED FOR NEXT 6 MONTHS

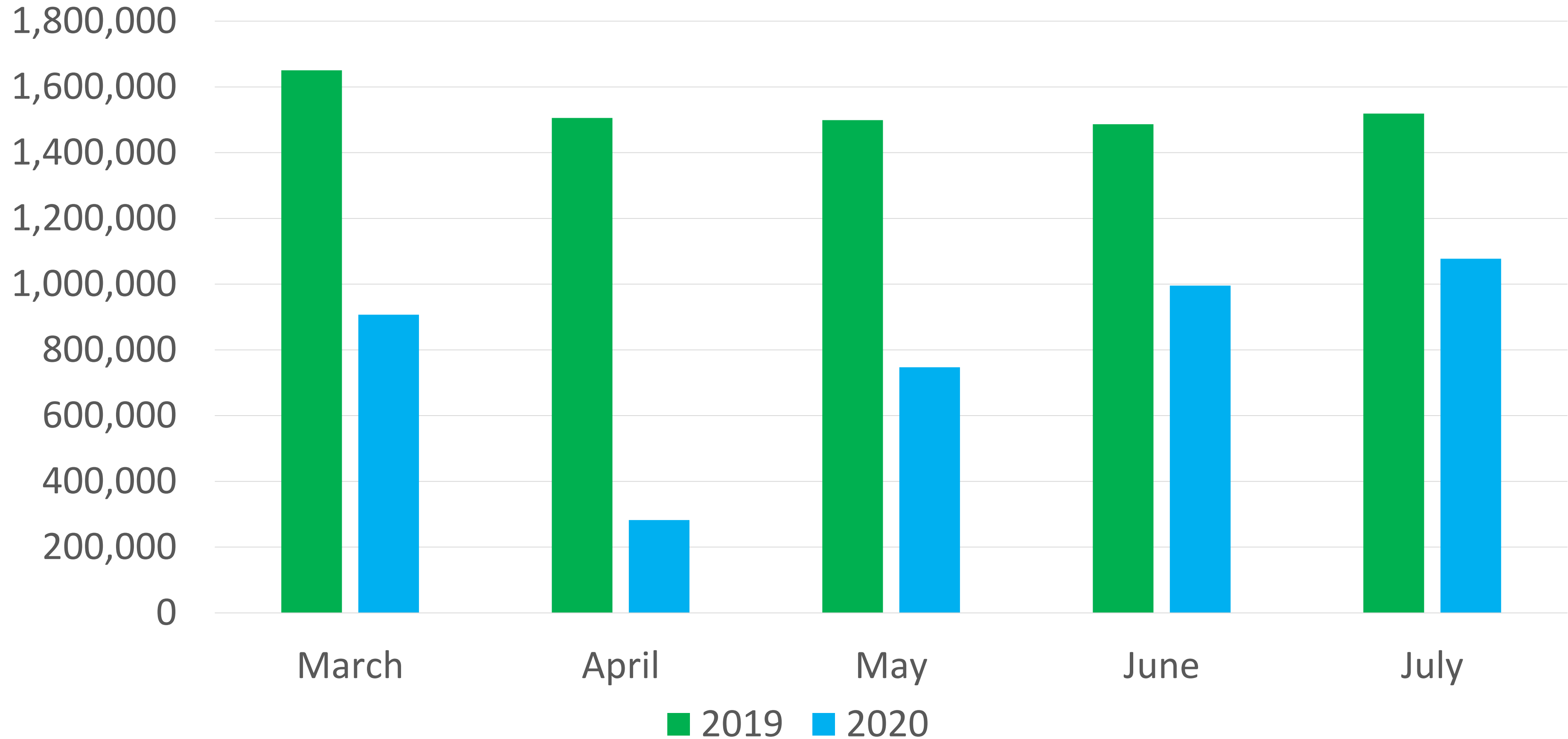
## VIRTUAL MEETING COMPONENT FOR LIVE EVENTS



Question: Are you currently working on any meetings or events that are already scheduled or being considered for the NEXT SIX (6) MONTHS? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

Question: Will any of these live meetings have a virtual option for those that do not want to attend live? Sample Size = 165

# DFW Recovery of Visitor Volume Beings in May 2020



# The Dallas/Fort Worth DMA Maintains a Solid #1 Ranking In Competitive Share In Texas

Overall Share of Trips to Dallas And Other Urban Areas Drop Slightly As Visitors Disperse To Less Urban Parts of State

Share of Trips to Dallas/Fort Worth (Overnight, Out of State Visitors Only)

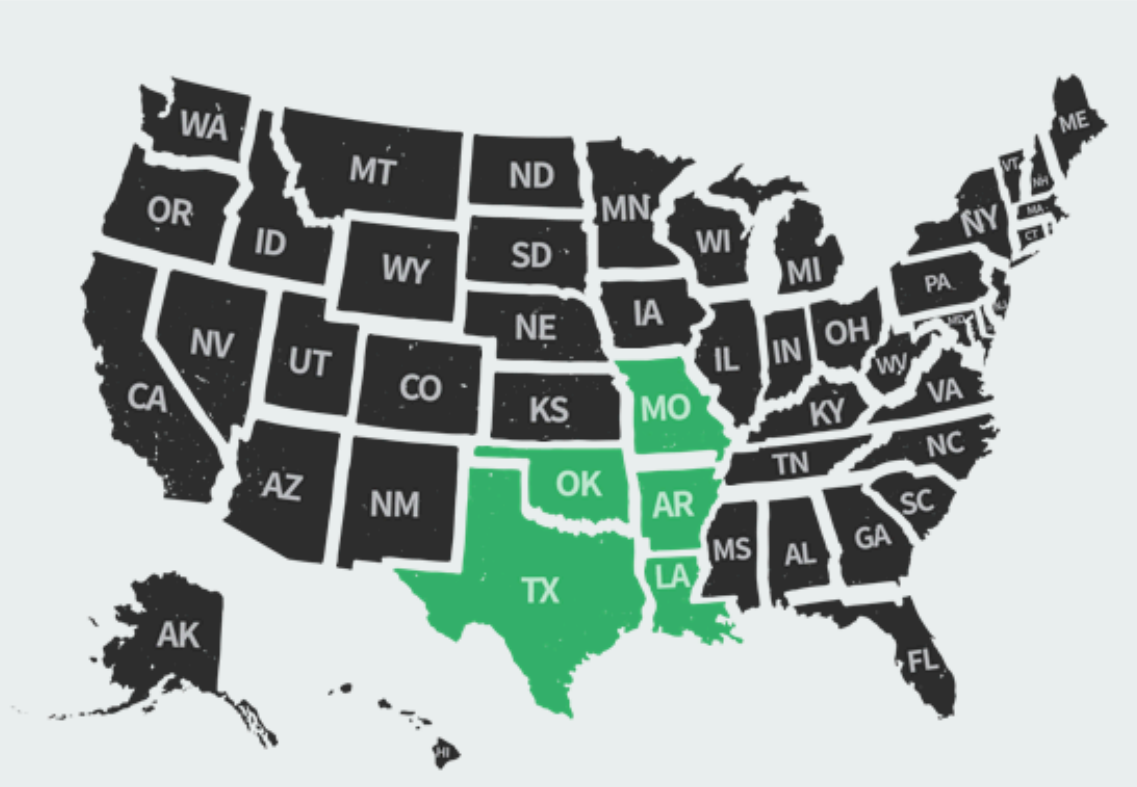


Shown: Overnight, Out of State Visitors Only



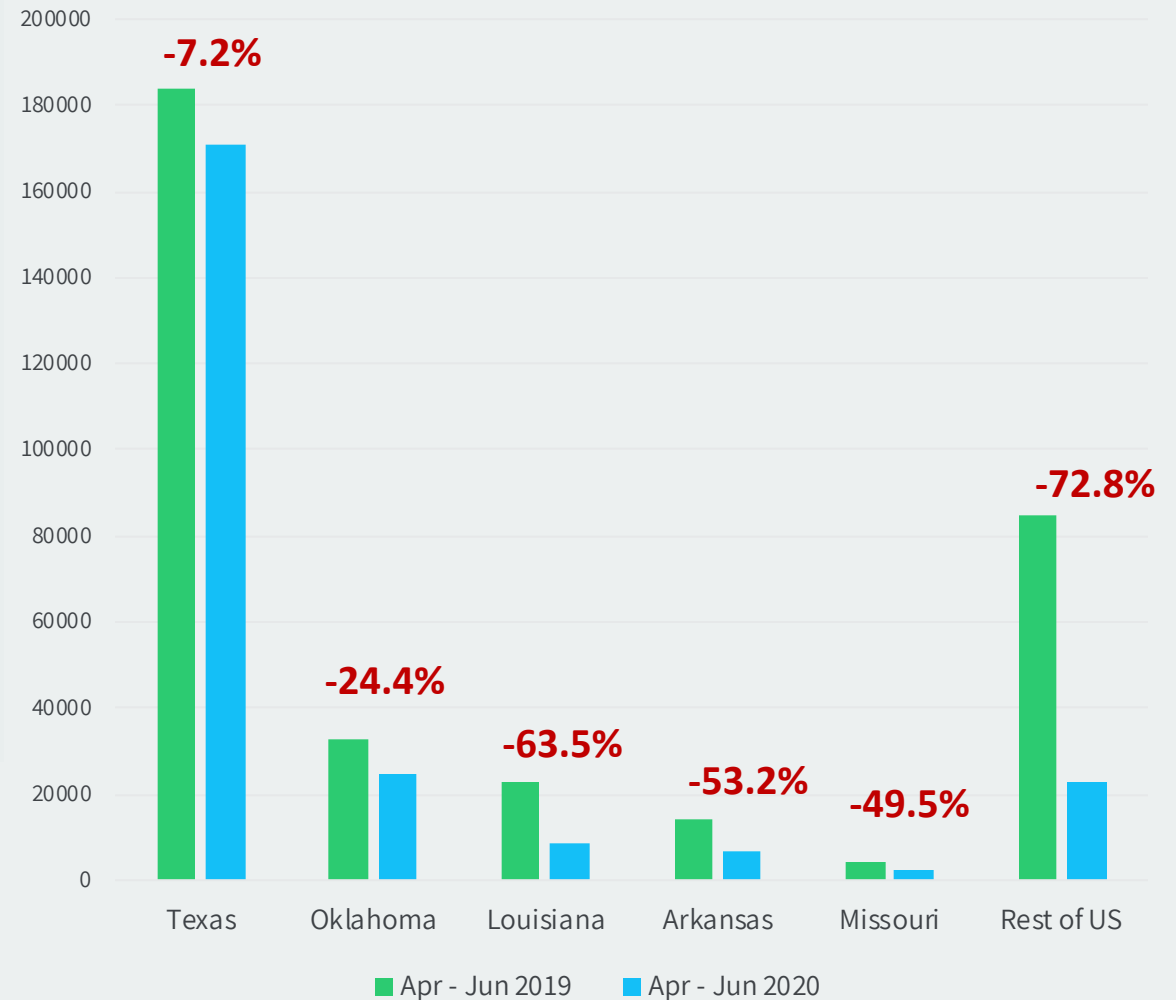
# How is the DFW Visitor Changing? April – June Year over Year

90.3% of trips came from the top 5 origin states from April - June 2020



**Texas origins rise from 53.6% to 72.4% during the current period.**

Panel Origins by State  
Ranked for 2020

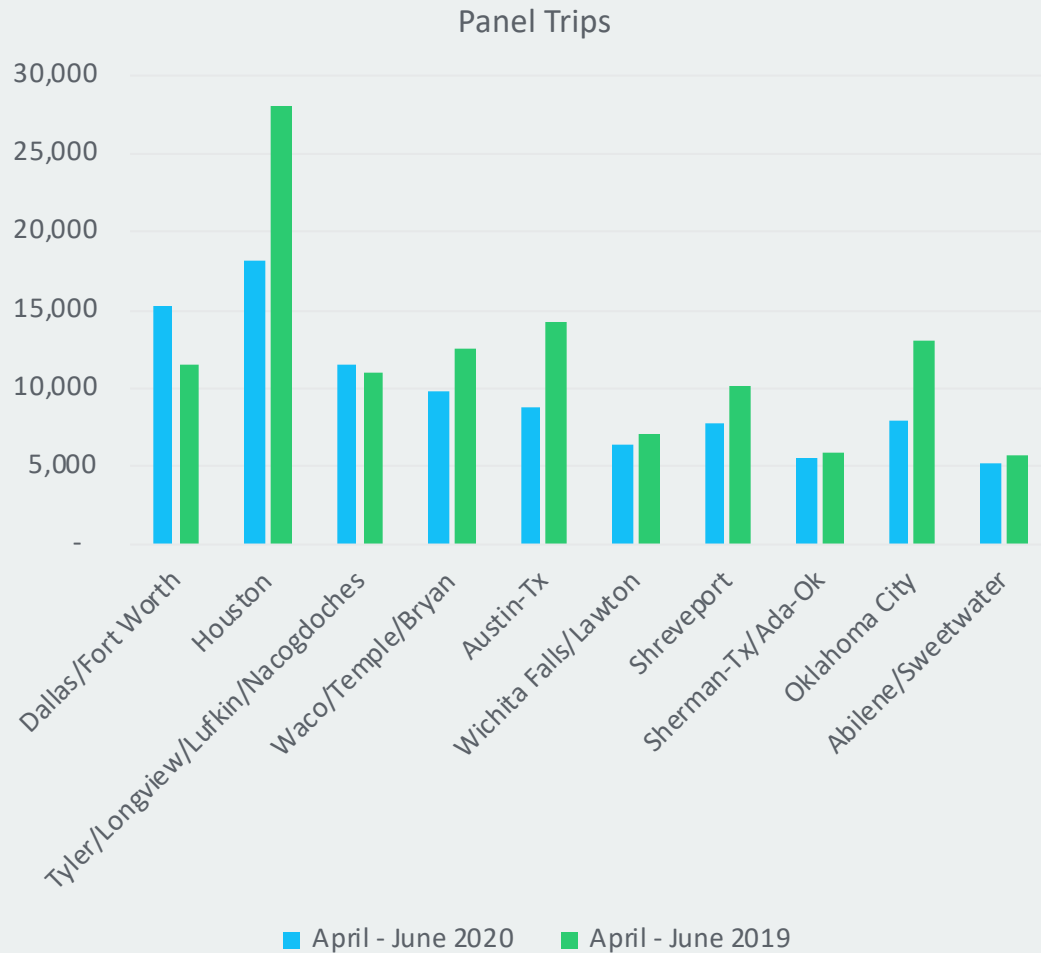


Source: Universe User Group, US Adult Only, Smartphone Only. Primary Trips.



# How is the DFW Visitor Changing? April – June Year over Year

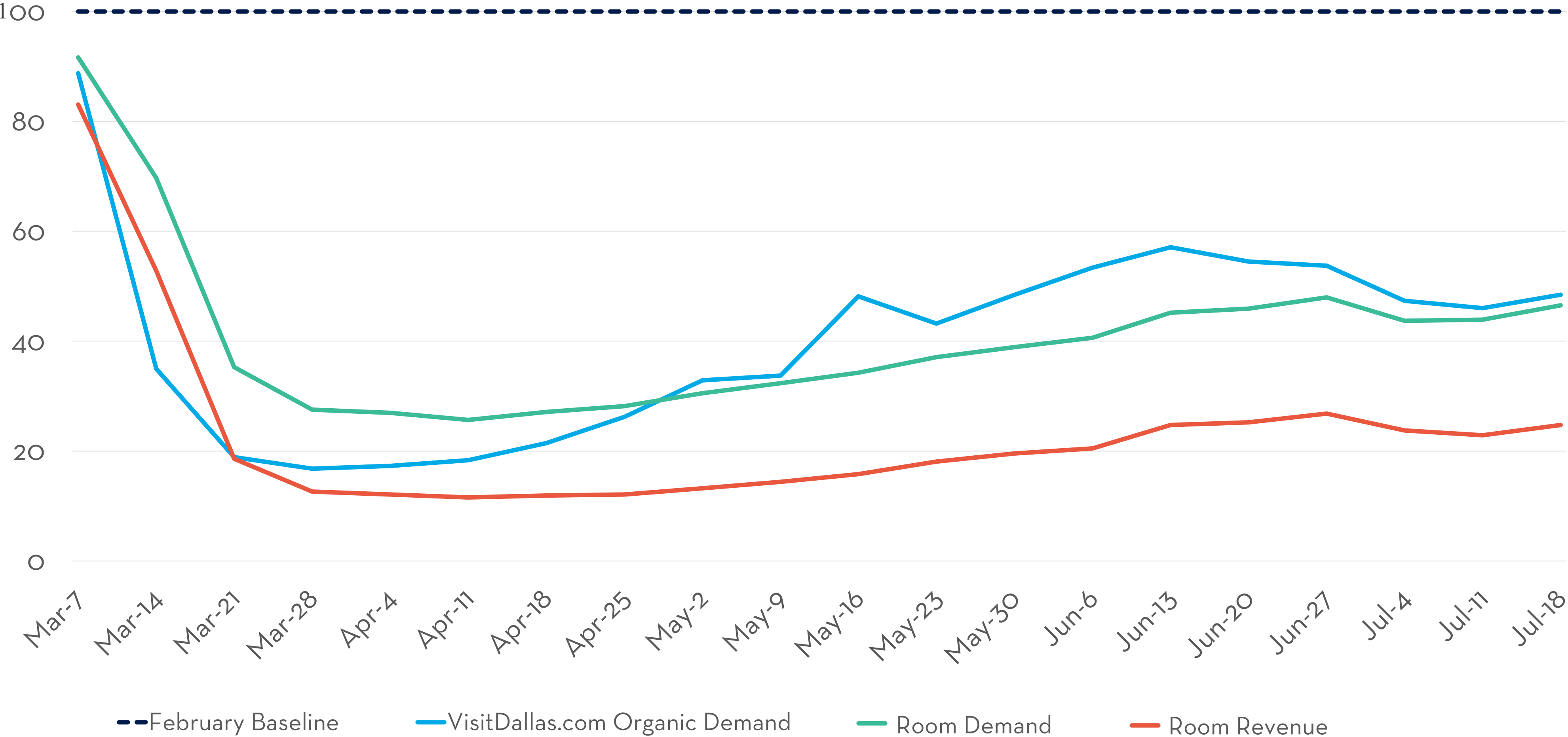
73.0% of trips came from the top 10 origin DMAs in 2020



DMA	% of Total Arrivals, Apr – Jun 2020	% of Total Arrivals, Apr – Jun 2019
Dallas/Fort Worth	15.2%	5.6%
Houston	11.1%	10.1%
Tyler/Longview/Lufkin/Nacogdoches	9.3%	4.9%
Waco/Temple/Bryan	7.7%	5.2%
Austin-Tx	5.7%	5.4%
Wichita Falls/Lawton	5.3%	3.1%
Shreveport	5.1%	4.3%
Sherman-Tx/Ada-Ok	5.0%	2.7%
Oklahoma City	4.8%	4.9%
Abilene/Sweetwater	3.8%	2.4%



# Weekly Recovery Metrics - Indexed to February Levels



# DALLAS FORECAST ASSUMPTIONS

## Scenario: Baseline

	2020Q4	2021Q1	2021Q2
Virus	<ul style="list-style-type: none"> <li>Progress against disease allows gradual easing of restrictions (e.g., through therapeutics)</li> </ul>	<ul style="list-style-type: none"> <li>Vaccine(s) or other substantial progress against disease allows further easing of restrictions</li> </ul>	
Groups	<ul style="list-style-type: none"> <li><b>Assumes almost no group business</b> (e.g. essential groups)</li> </ul>	<ul style="list-style-type: none"> <li><b>Small and medium groups gradually return in Q1</b> with physical distancing requirements. However, some groups have already canceled/postponed or choose not to meet and attendance at events is lighter than normal.</li> </ul>	<ul style="list-style-type: none"> <li><b>Large groups return in Q2.</b> Small and medium groups increase throughout Q2.</li> </ul>
Leisure transient	<ul style="list-style-type: none"> <li>Some households remain cautious, willingness to travel gradually improves</li> </ul>		
Business transient	<ul style="list-style-type: none"> <li>Corporate travel policies continue to restrict/discourage travel</li> </ul>	<ul style="list-style-type: none"> <li>Corporate travel restrictions gradually ease</li> </ul>	
International	<ul style="list-style-type: none"> <li>International inbound travel remains very limited</li> </ul>	<ul style="list-style-type: none"> <li>Easing restrictions on international inbound travel</li> </ul>	

# Tourism Economics 5 Year Hotel Performance Forecast - City of Dallas

Calendar Year	Occupancy %	% change	ADR	% change	RevPAR	% change
2020	40.2%	-40.9%	\$99.69	-21.4%	\$40.09	-53.5%
2021	53.9%	34.0%	\$100.95	1.3%	\$54.39	35.7%
2022	61.7%	14.4%	\$111.57	10.5%	\$68.80	26.5%
2023	64.7%	4.9%	\$117.15	5.0%	\$75.78	10.1%
2024	66.6%	2.9%	\$122.42	4.5%	\$81.49	7.5%
2025	65.9%	-1.0%	\$126.09	3.0%	\$83.13	2.0%

