

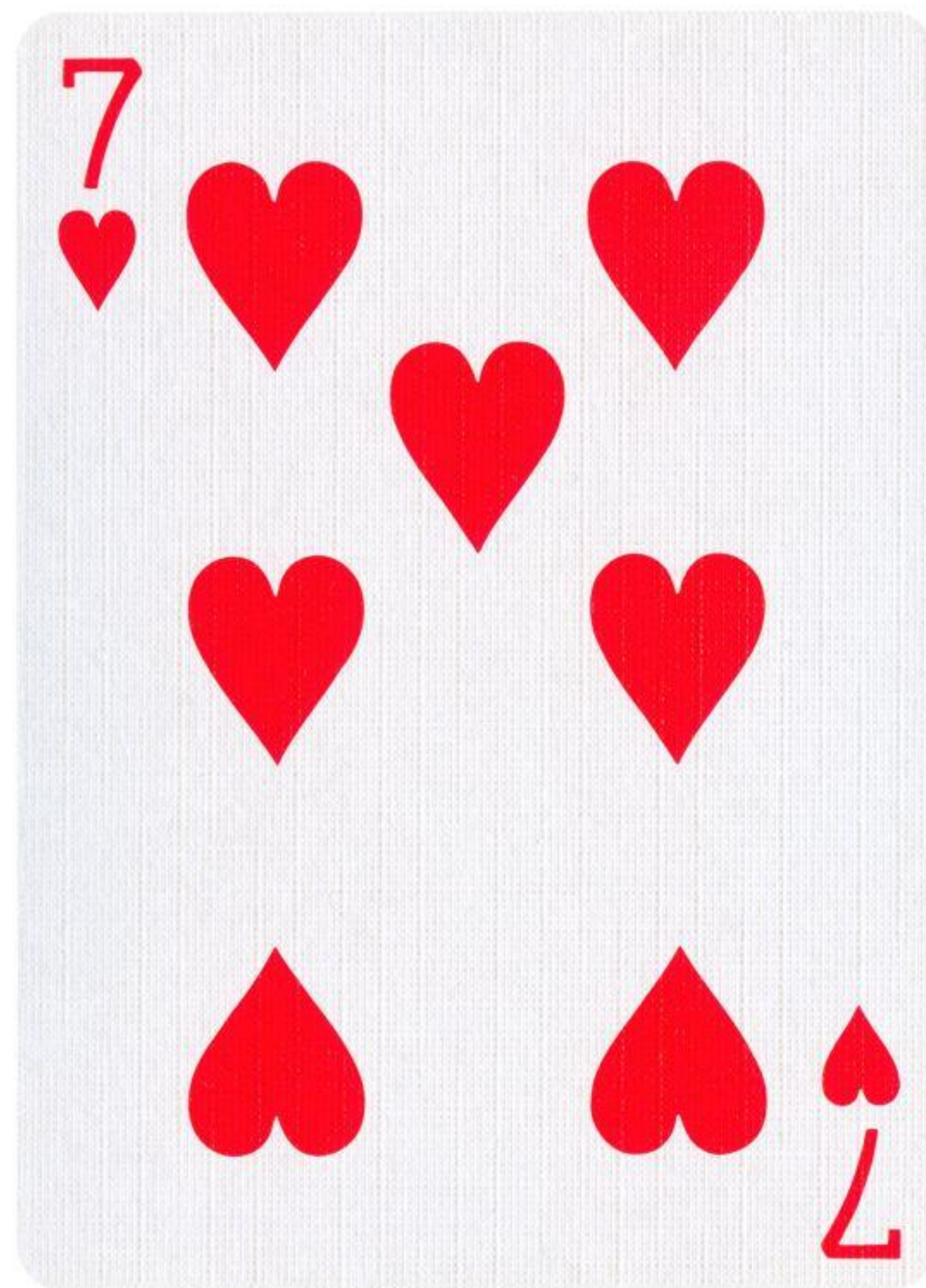


Coronavirus Travel Sentiment Index

Presentation of Findings—Week of April 27th

Destination  Analysts







IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or 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.

Please consider purchasing, subscribing or donating to support this research
<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

THANK YOU
so much to our clients and partners who have

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

Send suggestions or requests for questions to:

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



Presentation deck and webinar recording available on our website:

DestinationAnalysts.com/covid-19-insights/covid-19-webinars/

TODAY

Overview of Findings

Travel Marketing
Potential Influence Index

Panel Discussion:
Retail & Tourism

Questions + Answers



Joining Us



Jackie
National Harbor



Keri
Macy's



Lorenzo
Everlane



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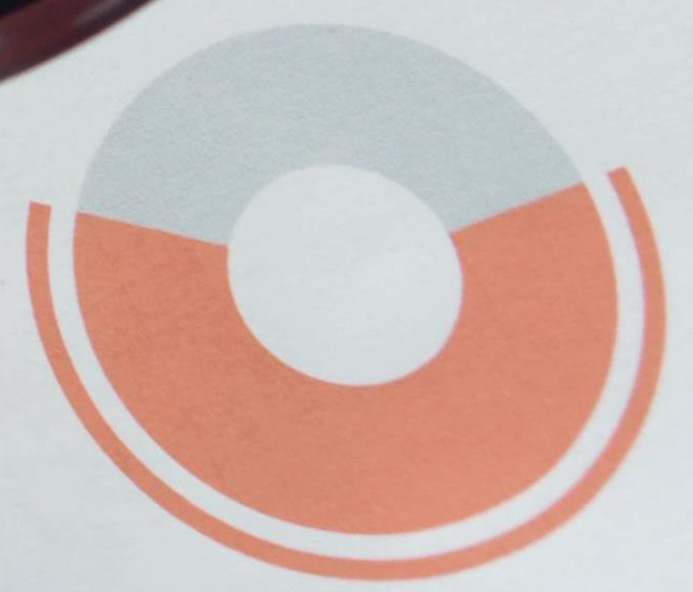
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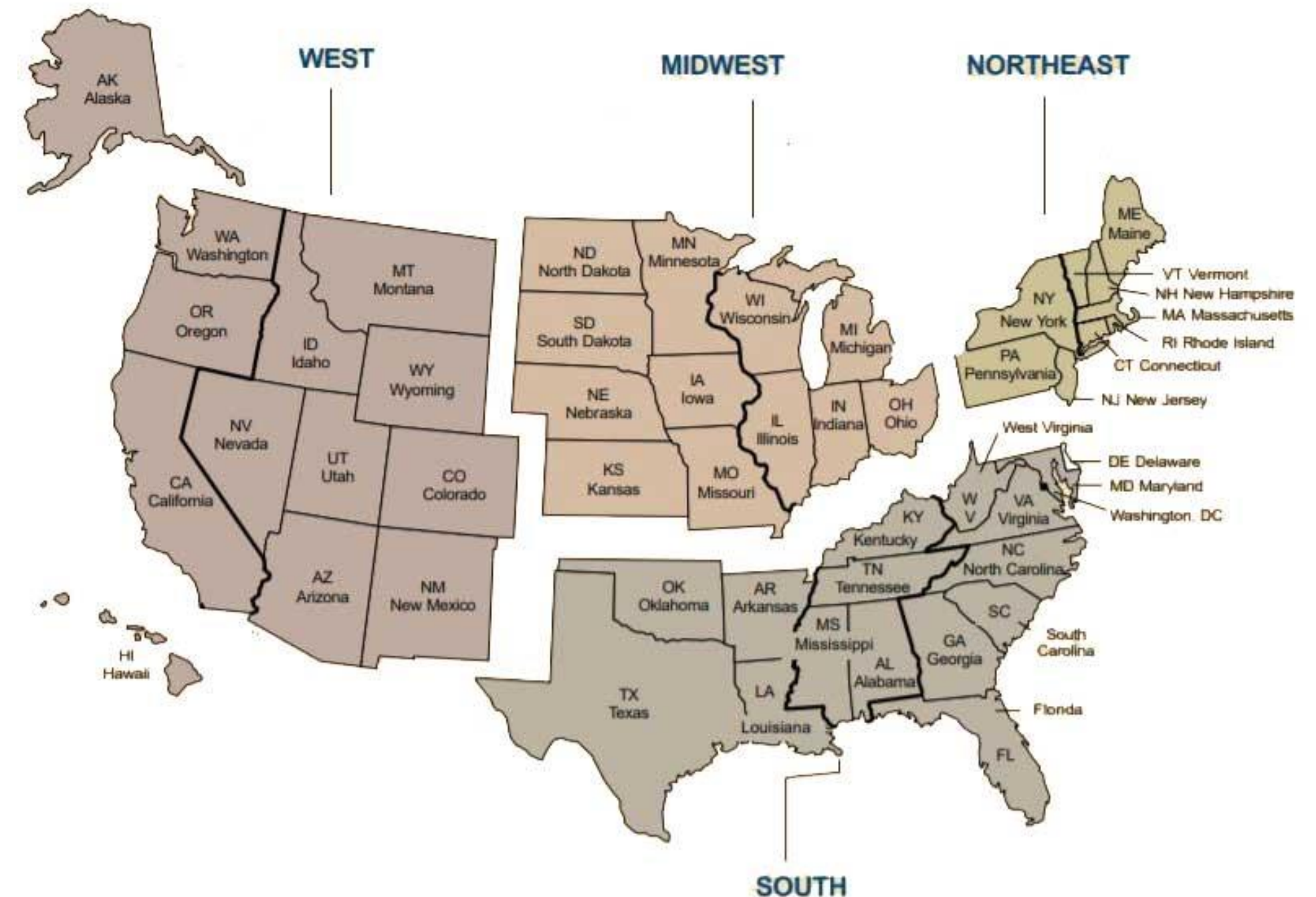
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Project Overview & Methodology

- **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 7 data (fielded April 24th-26th) will be presented today**
- **1,208 fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

Map of U.S. Showing Survey Regions



NATIONAL & WORLD NEWS

APRIL 24, 2020 | 7:40 PM

Georgia businesses start to reopen as Trump distances himself from state's governor

Ry Brakken Booker/NPR

INDEPENDENT

NEWS POLITICS VOICES SPORT CULTURE INDY/LIFE INDYBEST VIDEO DAILY EDITION

'Social distancing will be with us through the summer': White House health expert warns Americans to prepare for many months of restrictions

'Social distancing will be with us through the summer to really ensure that we protect one another,' Dr Deborah Birx said

Griffin Connolly Washington | 1 day ago |

The Philadelphia Inquirer

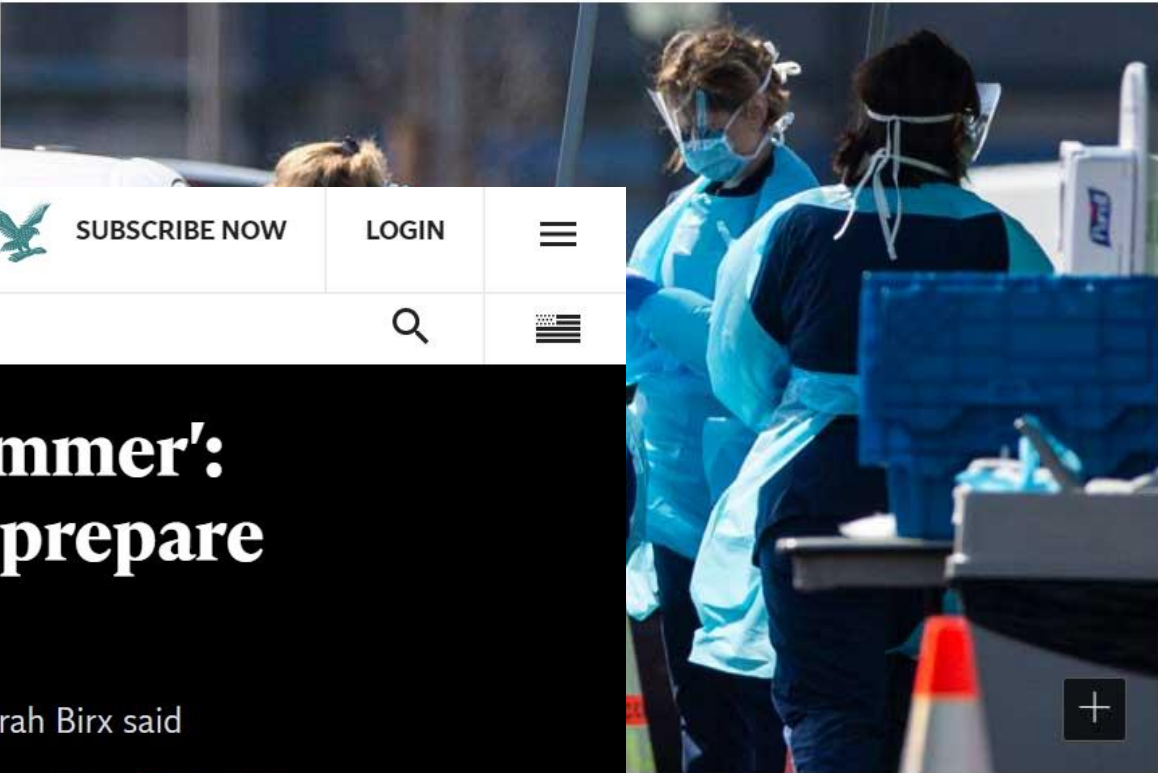
NEWS SPORTS BUSINESS OPINION POLITICS ENTERTAINMENT LIFE FOOD HEALTH REAL ESTATE OBITUARIES JOBS

Coronavirus testing is key to reopening society. Here's why U.S. capacity is still inadequate.


by Marie McCullough, Updated: April 26, 2020- 5:04 AM


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Sara Nelson 
@FlyingWithSara




ENOUGH! This was TODAY on a four hour flight. This is not okay. Masks must be mandated by DOT/HHS in airports and on airplanes. Essential travel only, with proper PPE. [#COVID19](#)
[#Sto](#)

AP

The howling: Americans let it out from depths of pandemic

By DAVID ZALUBOWSKI and JAMES ANDERSON





Click to copy

DENVER (AP) — It starts with a few people letting loose with some tentative yelps. Then neighbors emerge from their homes and join, forming a rolling chorus of howls and screams that pierces the twilight to end another day's monotonous forced isolation.

Tweet your reply


HOT TAKE THOUGHT EXPERIMENT SELF EXPLANATORY WHY IS THIS HAPPENING? MAVERICKS WITH ARI MELBER

Dr. Ryan Marino Trump's inject disinfectant coronavirus tips don't match up with the science

As an emergency physician and medical toxicologist, believe me when I say there is no need to test this hypothesis.

Despite warnings, conspiracy theorists push bleach, UV rays as COVID-19 cures

APRIL 24, 2020 / 04:26



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CORONAVIRUS: HOW TO HELP Published 3 days ago

Mission to collect iPads for hospital patients in isolation goes national

By Rob DiRienzo | Fox News



Mission to collect iPads for hospital patients in isolation goes national

Stringent visitation rules barring families from seeing their loved ones due to the coronavirus pandemic often leave patients in nearly-complete isolation.

BBC Sign in News Sport Reel Worklife Travel Future Me

NEWS

Home Video World US & Canada UK Business Tech Science Stories Entertainment

UK England N. Ireland Scotland Wales Politics

Coronavirus: Preparing for a Ramadan under lockdown

23 April 2020



Eid al-Fitr

For Dr Kiran Rahim this year's Ramadan will be like no other as she spends hours behind a hot mask on an intensive care ward treating people suffering from Covid-19.

What do we most want?

Happiness

Friendship

Money

Love

Escape

Safety



A romantic couple is shown in a close-up, intimate setting. The man, with a beard and wearing a dark jacket, is on the left, looking towards the woman. The woman, with long blonde hair, is on the right, smiling and holding a glass of red wine. The background is a soft, out-of-focus sunset with warm orange and yellow light filtering through trees. The entire scene is overlaid with a semi-transparent white text box.

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 months.

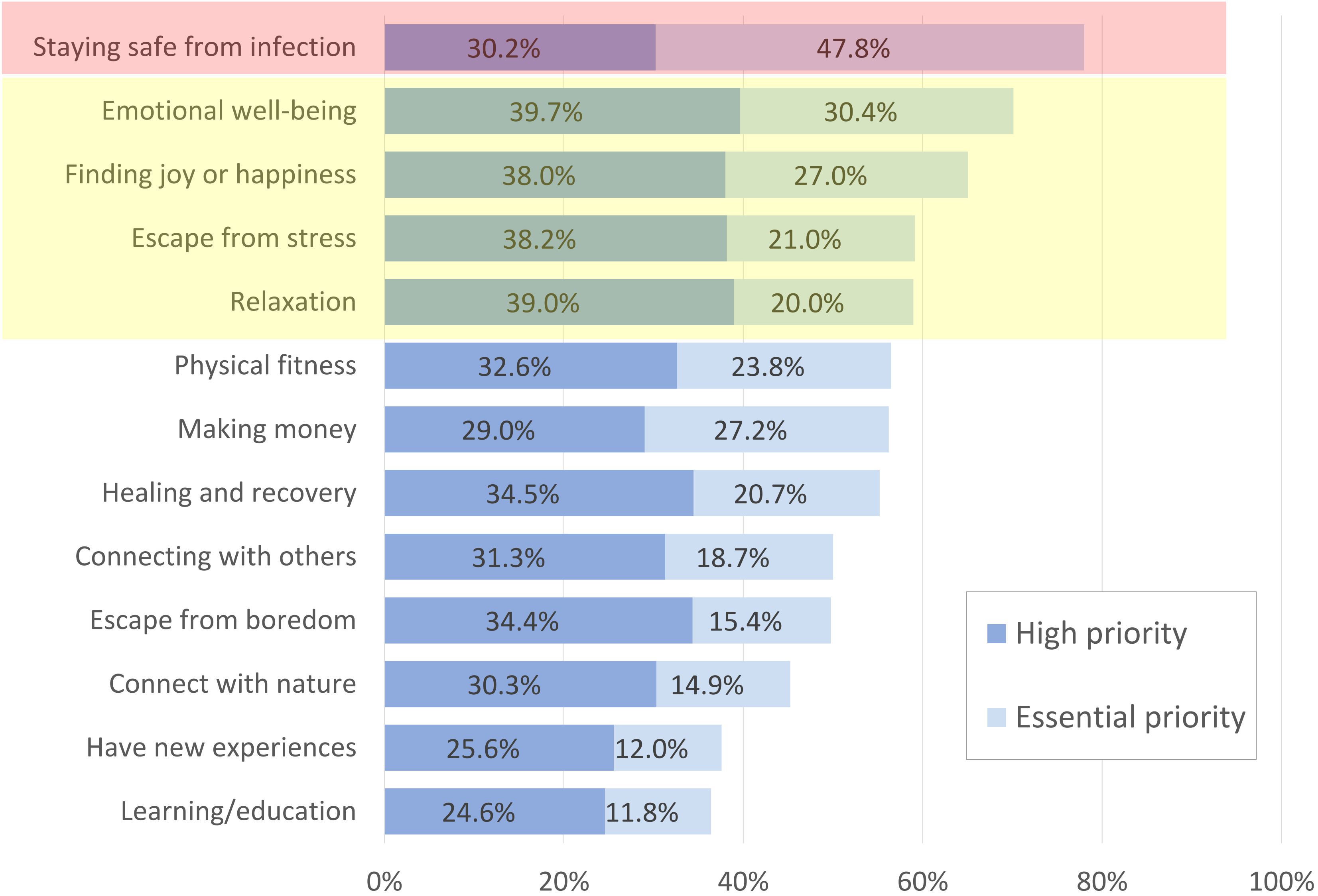
- Essential priority
- High priority
- Medium priority
- Low priority
- Not a priority

Traveler Priorities

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: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)





31.2%

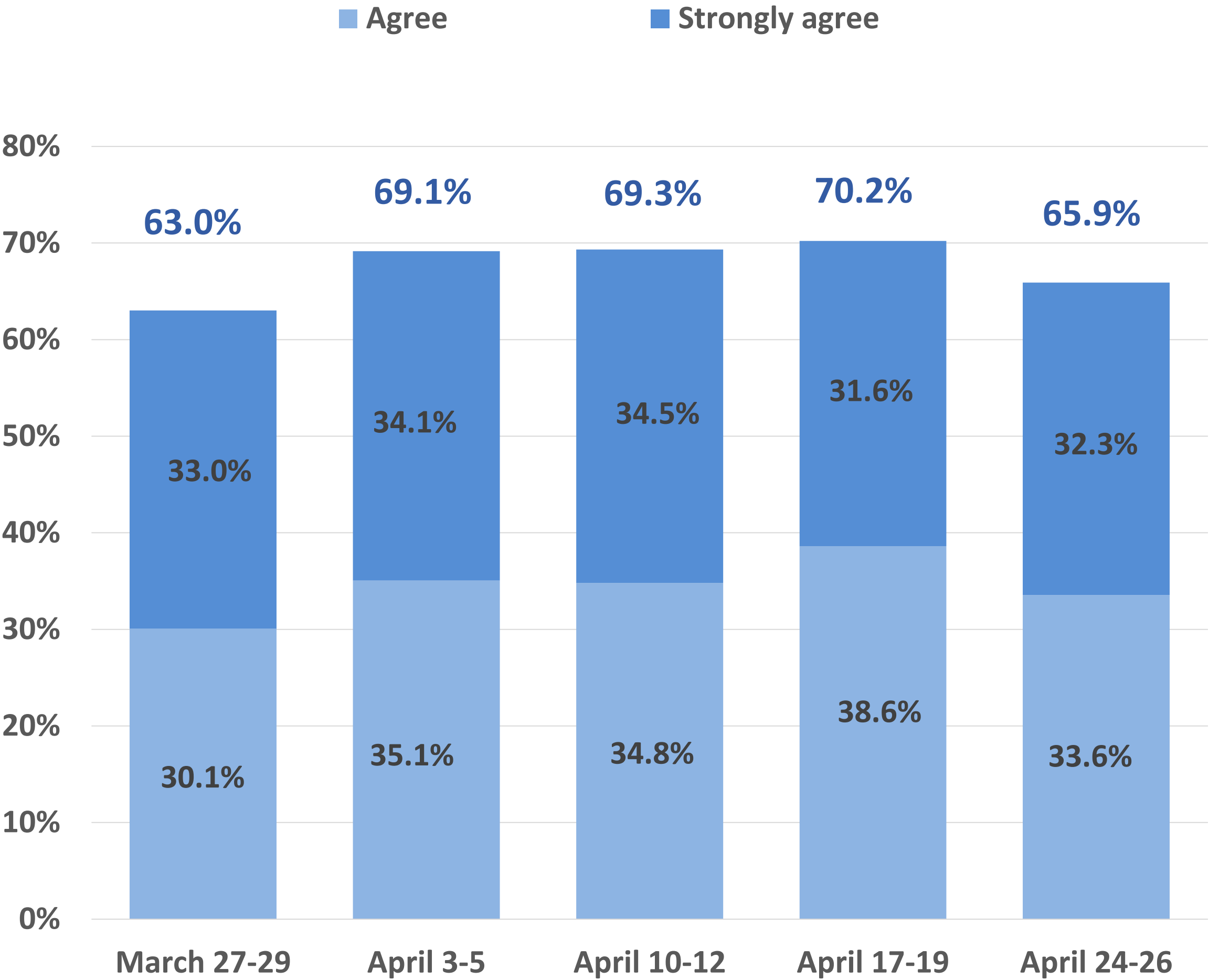
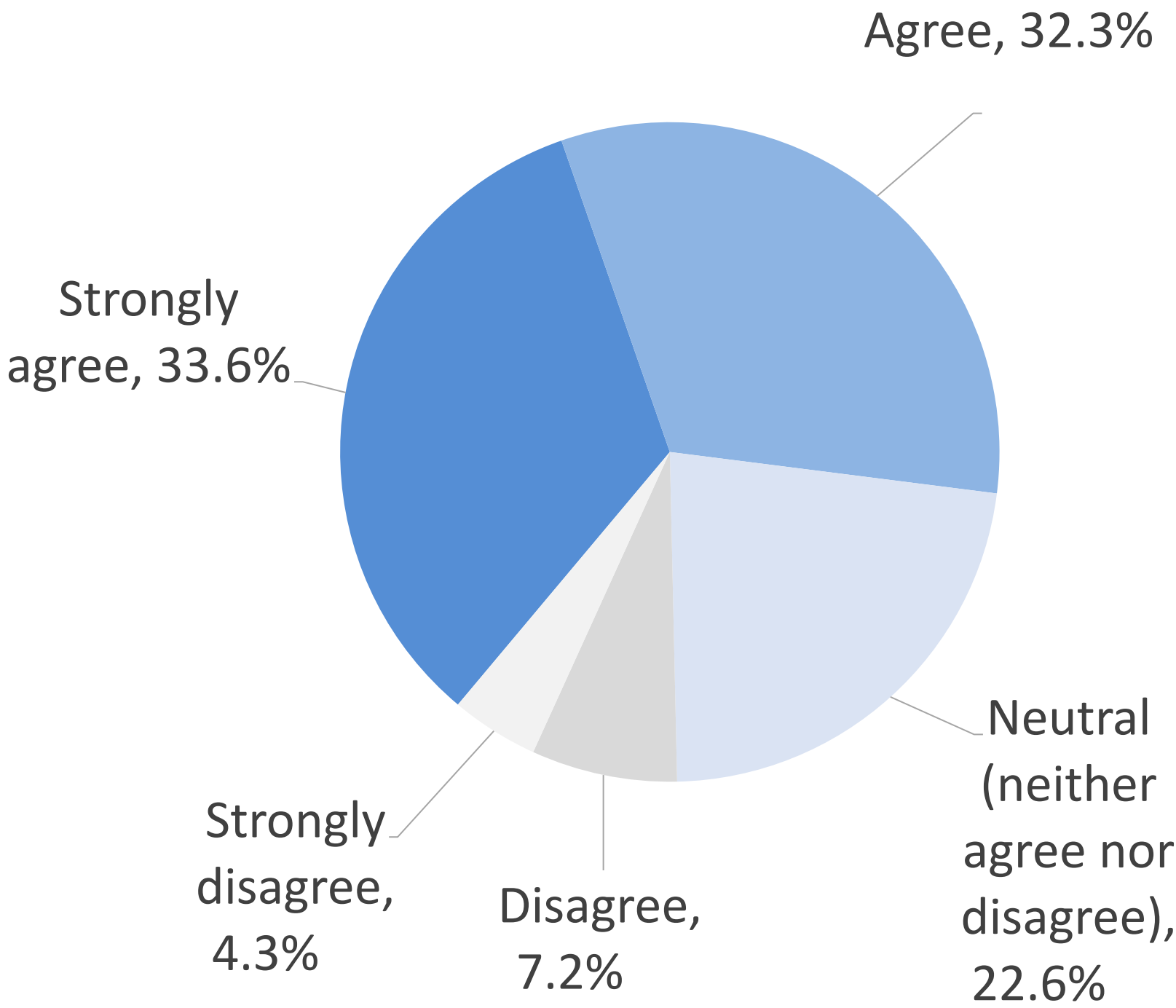
**American travelers who
consider leisure travel
“extremely important” to
their overall well-being
and sense of happiness**

Travel
is my
Therapy

Excitement to Get Back to Travel

How much do you agree with the following statement?

Question: I miss traveling. I can't wait to get out and travel again.



Question: What ONE WORD best describes how you feel about travel right now?



5 Weeks ago



Now





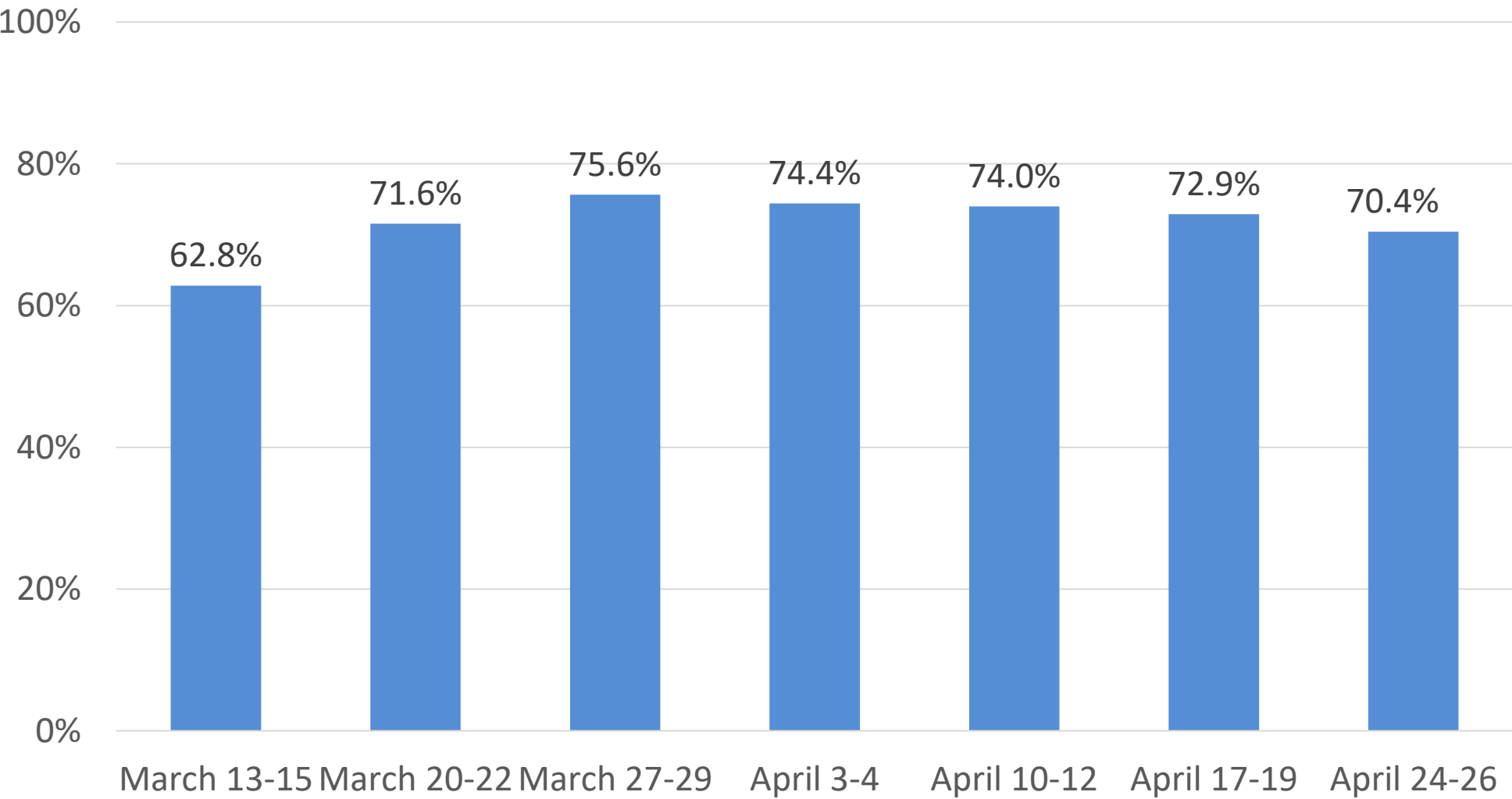
Personal Concerns & Feelings of Safety



Summary: Safety Concern Metrics

Concern About Contracting Virus (Personally)

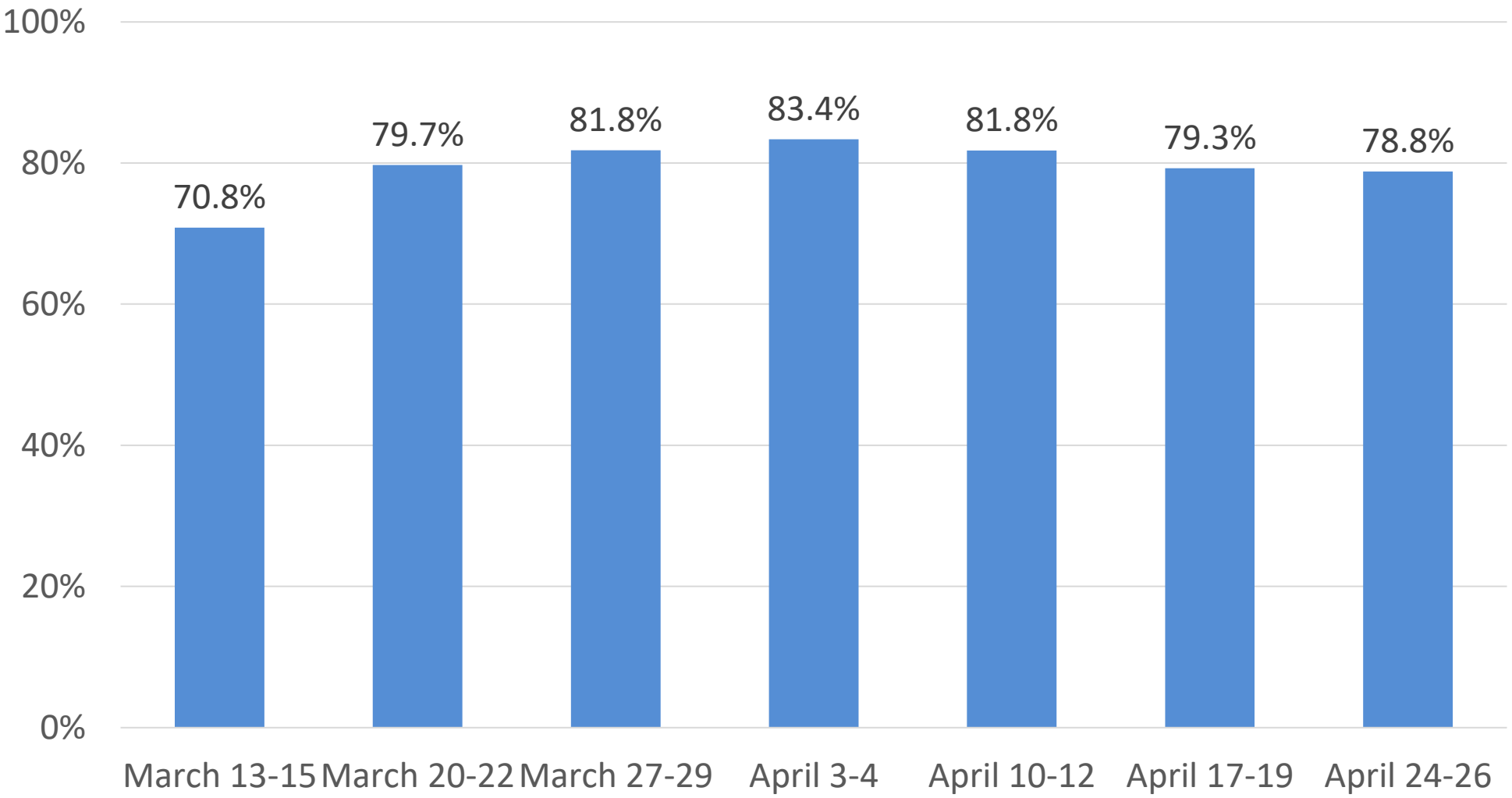
(% answering 6-10 on 11-point scale)



Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

Concern About Loved Ones Contracting Virus

(% answering 6-10 on 11-point scale)

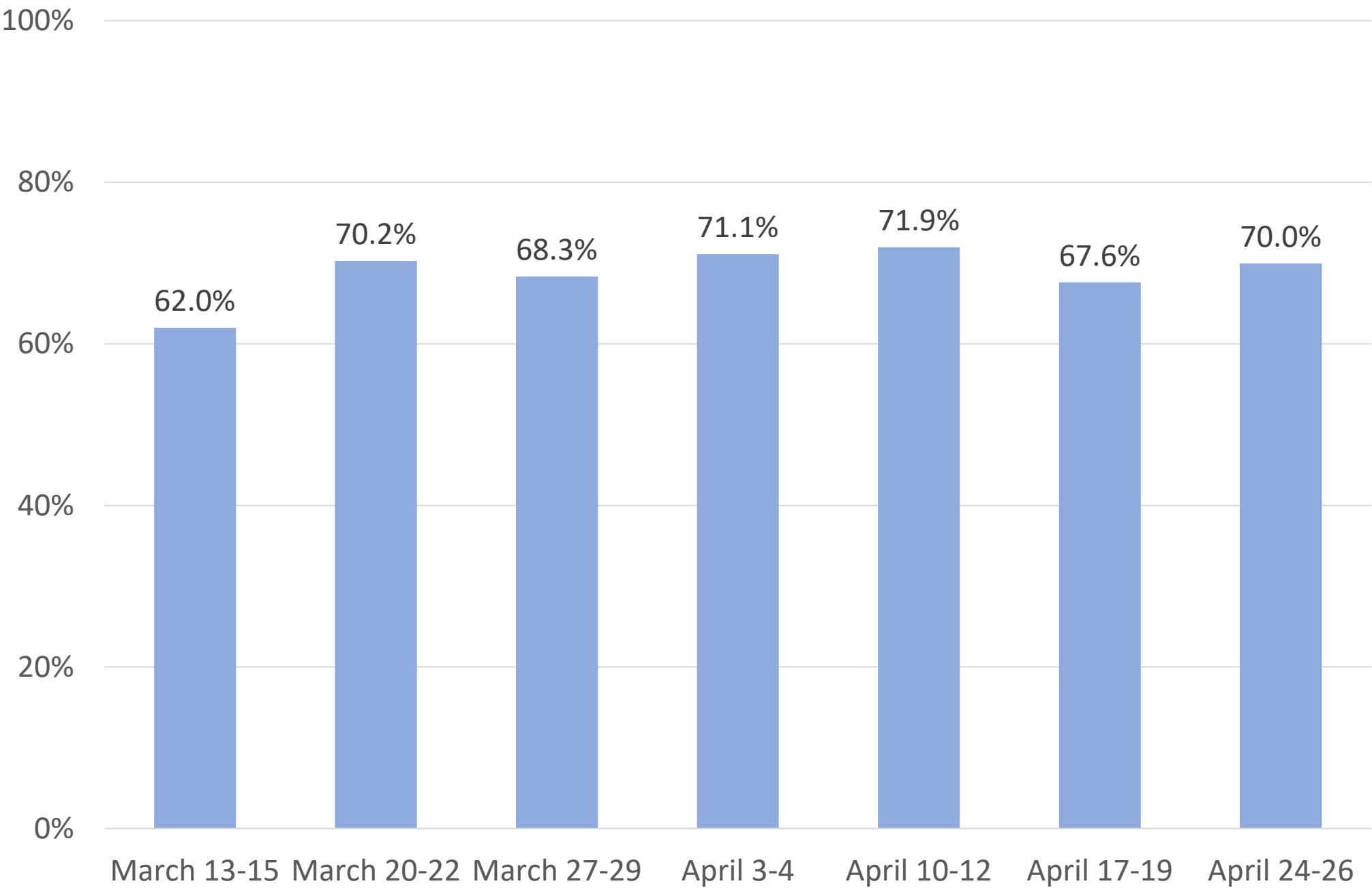


Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

Summary: Economic Concern Metrics

Personal Finances

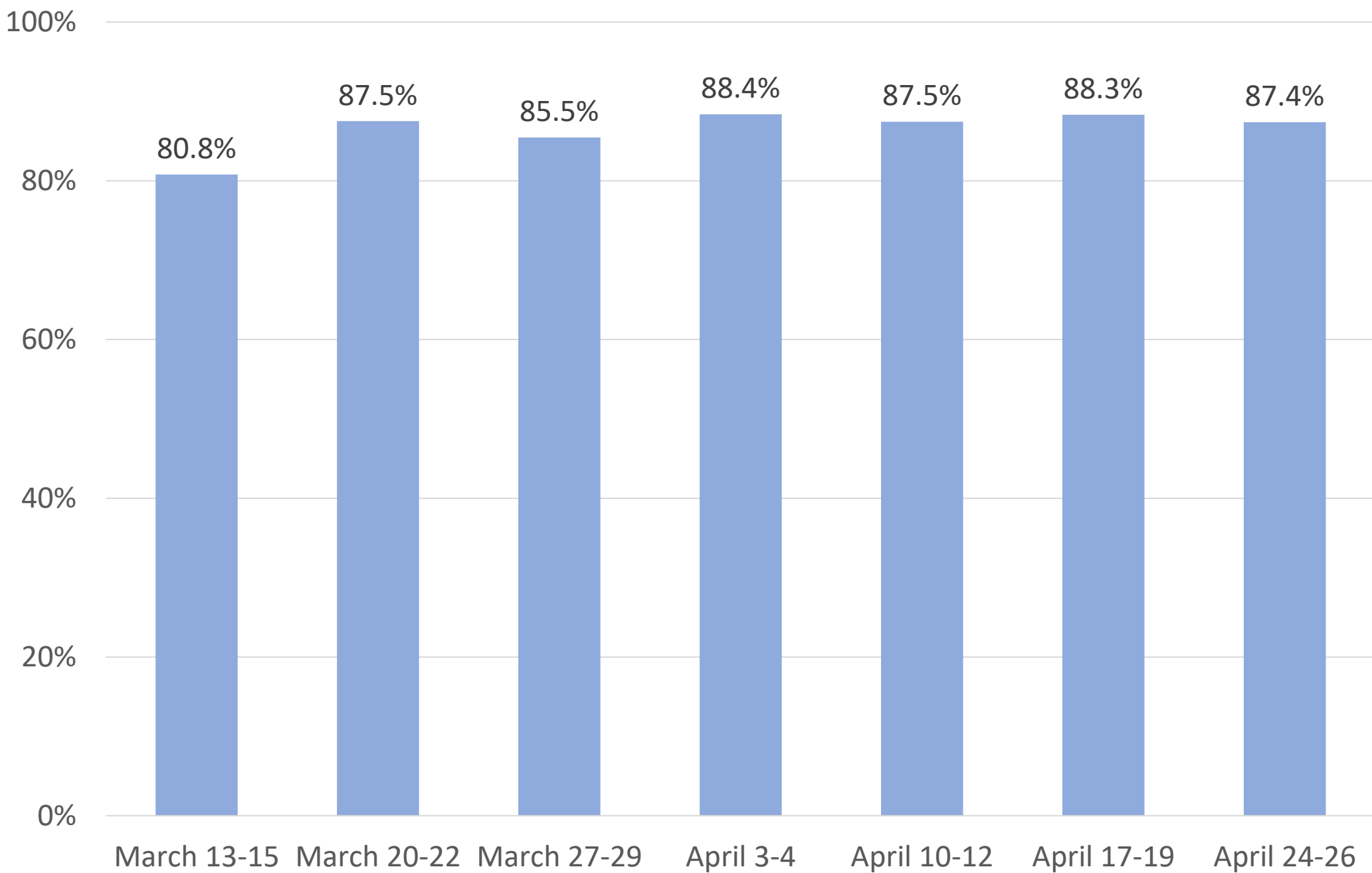
(% answering 10-6 on 11-point scale)



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)

National Economy

(% answering 10-6 on 11-point scale)



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

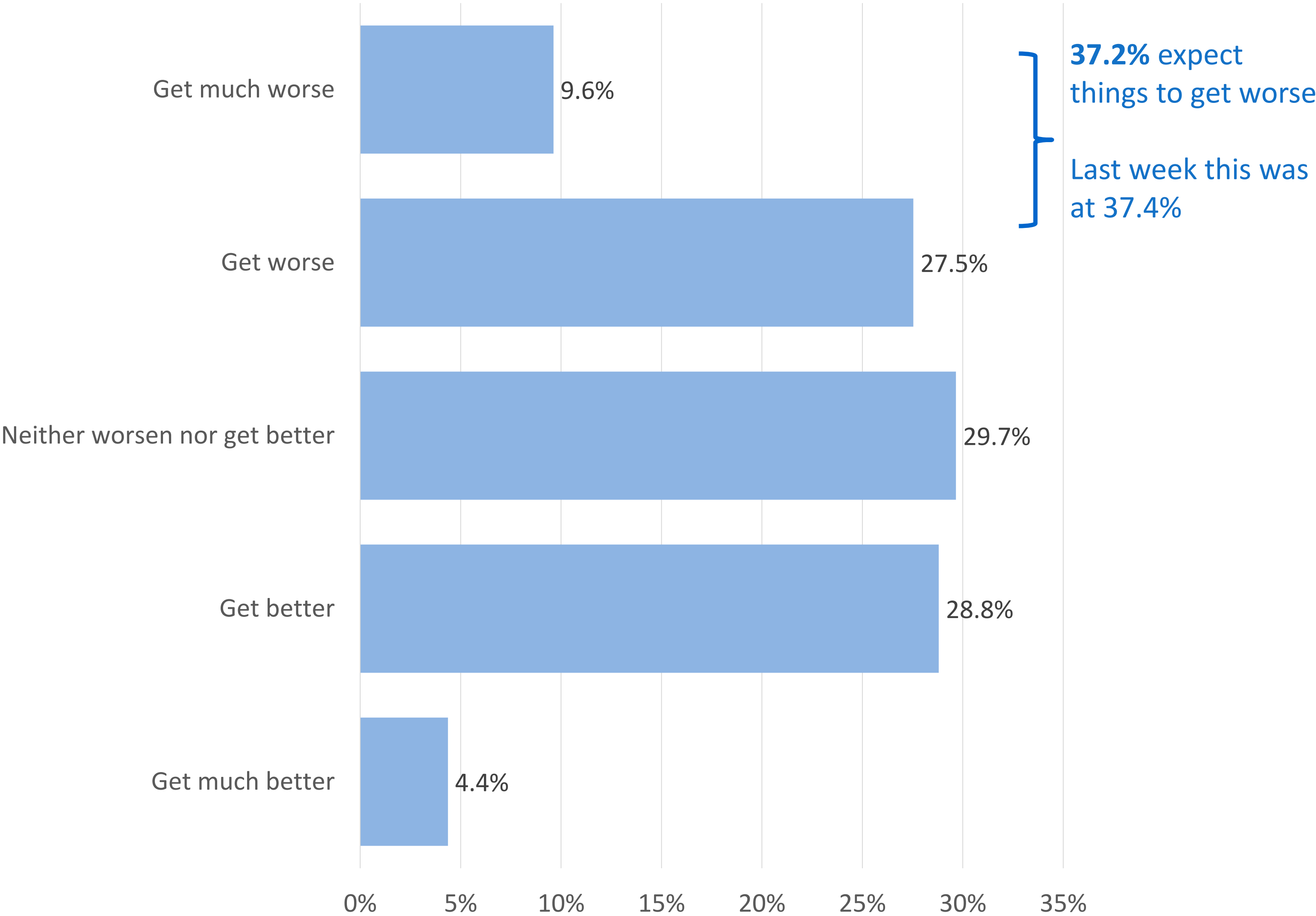
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

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 _____

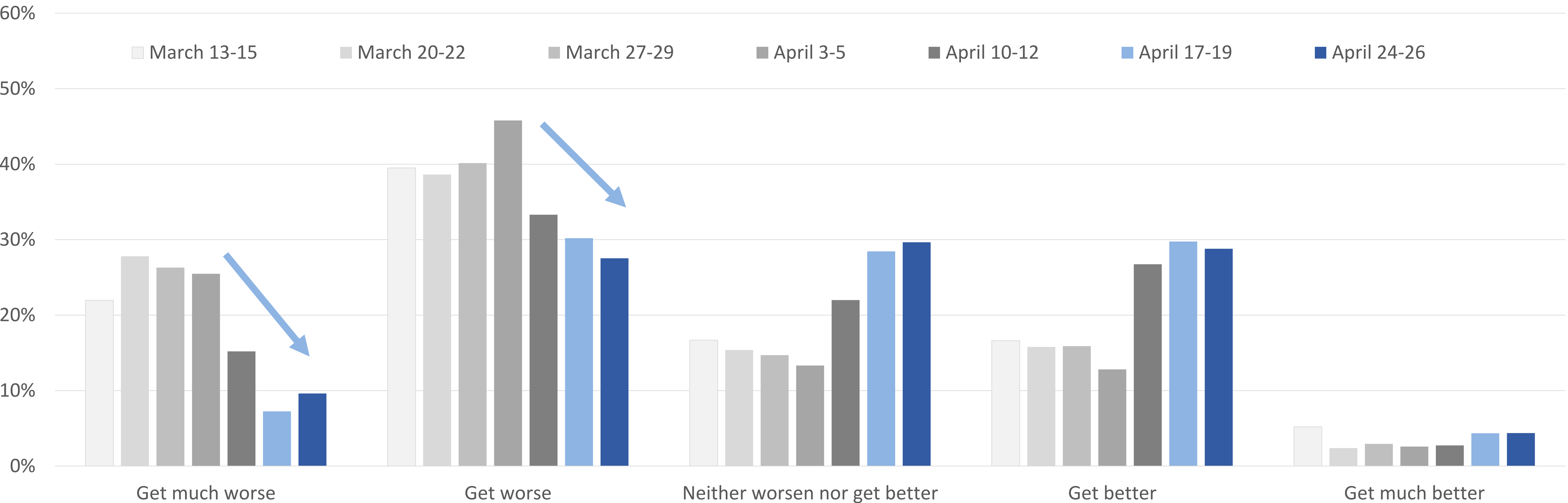
(Base: Wave 7 data. All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)



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 _____

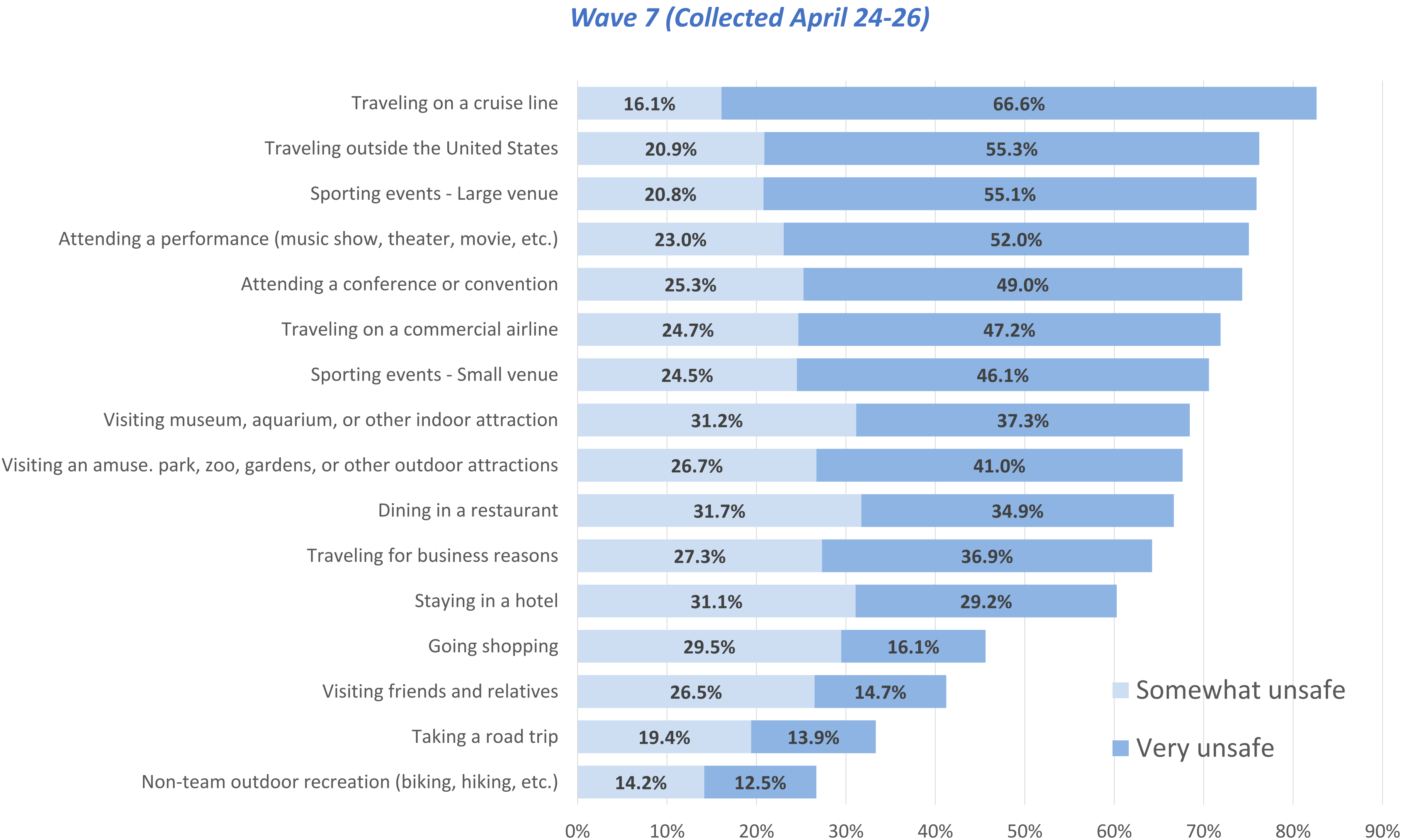


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

Perceived Safety of Travel Activities (Wave 7)

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

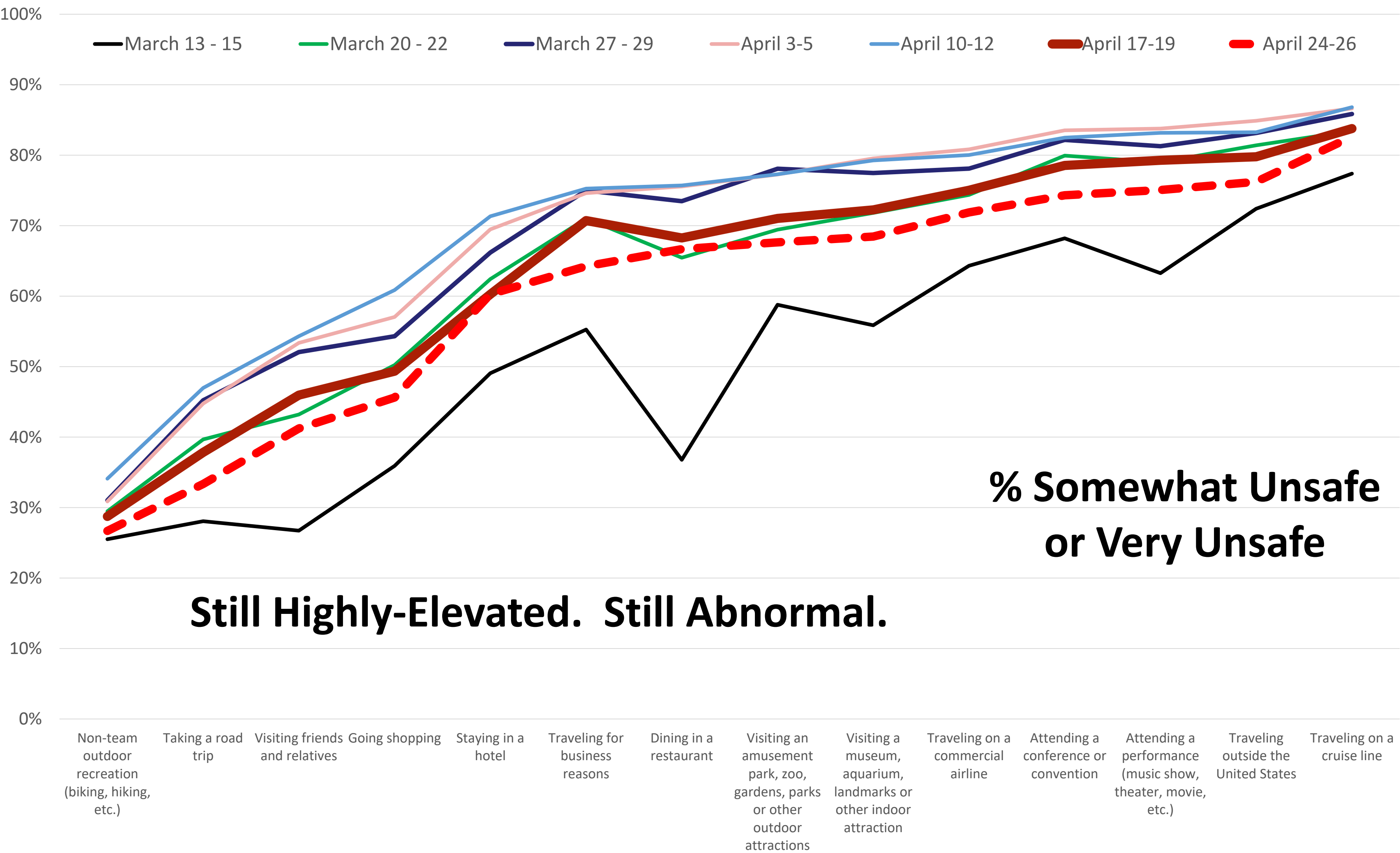
(Base: Wave 7 data. All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)



Perceived Safety of Travel Activities (Waves 1-7 Comparison)

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)



In Summary

Personal safety is our top emotional priority at the moment

Travel is set to fulfill secondary needs when travelers are ready

Our concerns for:

- Safety (Personal/friends/family)
- Economics
- Travel activity safety

Still highly-elevated. Still abnormal.

The improvement of safety perceptions of travel activities may suggest a degree of normalization or adjustment



A photograph of a man in a grey long-sleeved shirt and a dark apron with a white and blue stripe, wearing a black face mask. He is handing a white paper shopping bag to a woman in a light blue button-down shirt, who is also wearing a green face mask. They are in a shop with shelves of products in the background. The text "Reopening Business" is overlaid in the center.

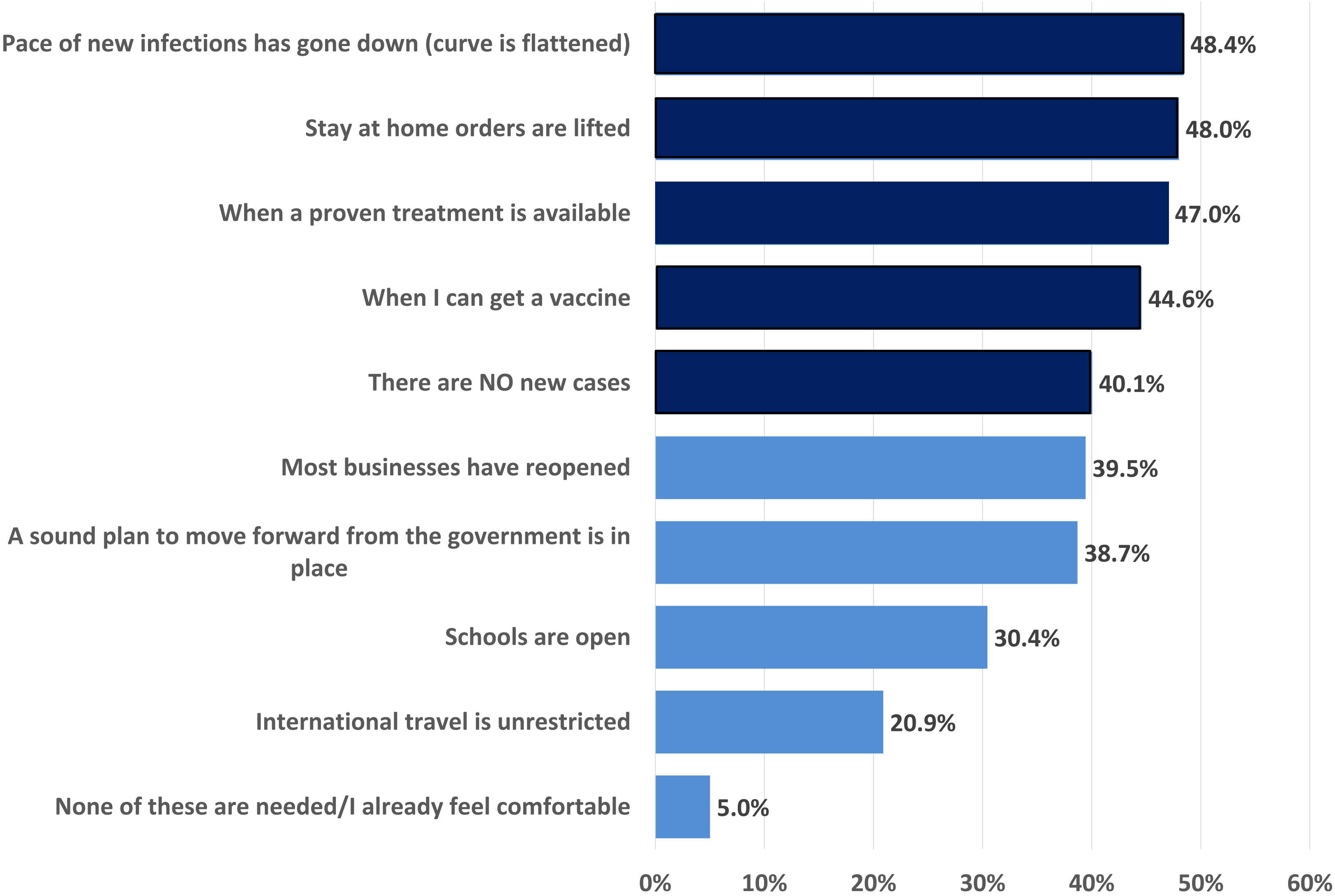
Reopening Business

What Travelers Need to Feel Normal Again

Question: Which of the following will you **NEED TO FEEL COMFORTABLE** going back to your normal (or near-normal) lifestyle? (Select those you feel you will need)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7

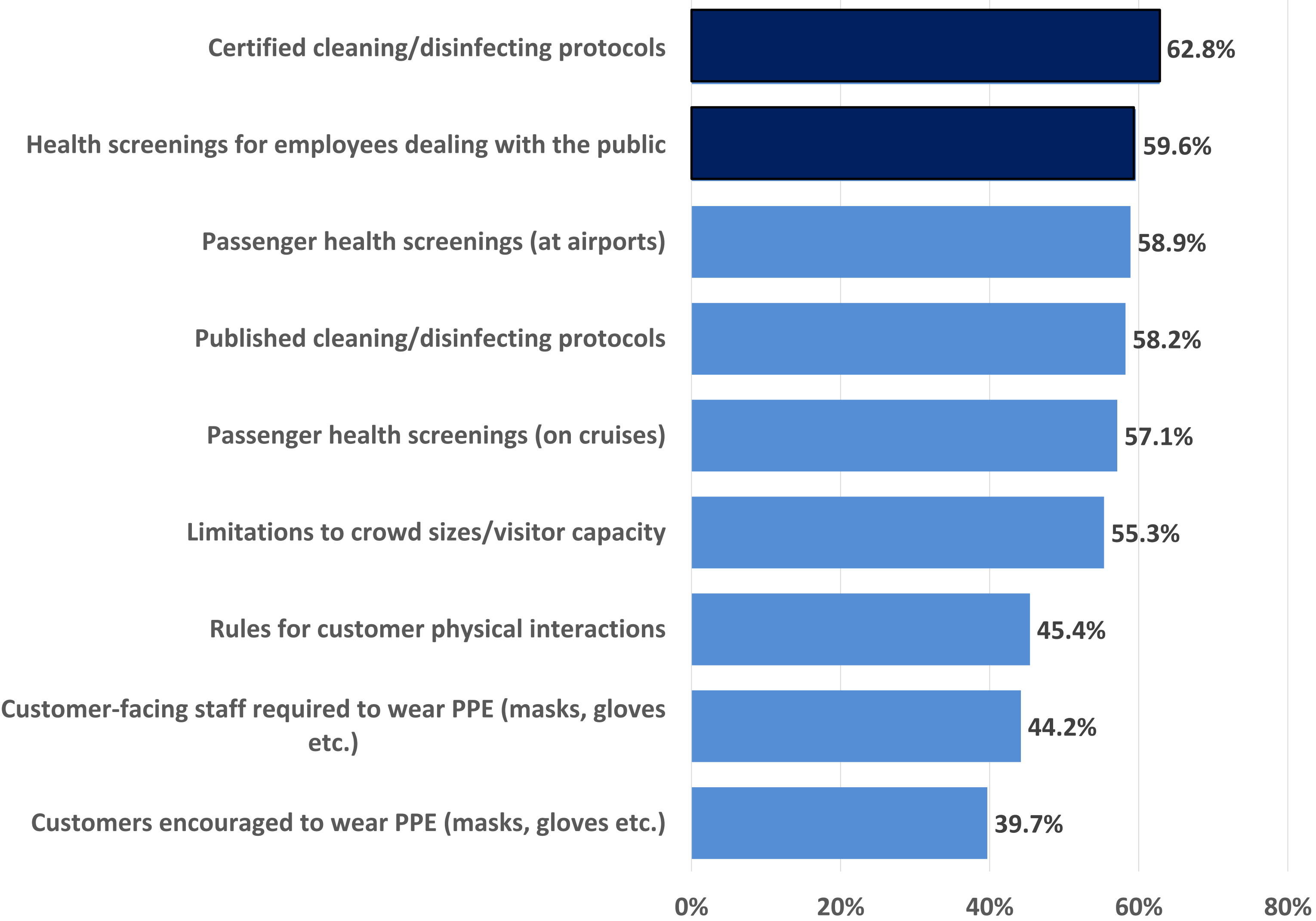


Desired Common Business Practices

Question: Moving forward, which of these would you want to see as common business practices? (Select all that apply)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7





Which of these would you want to see as common business practices?

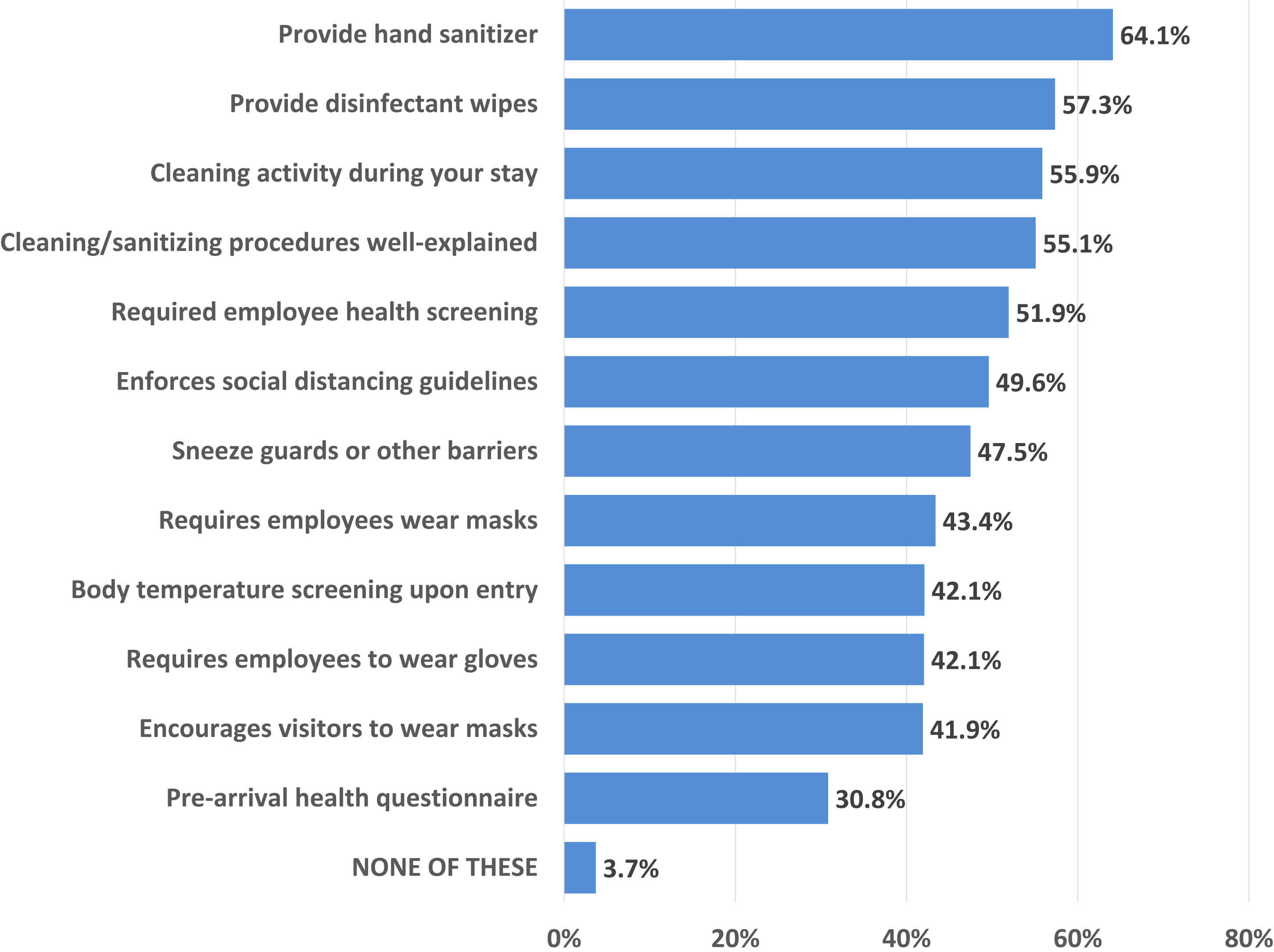
	Millennials/GenZ	Baby Boomers
Certified cleaning/disinfecting protocols	60.7%	66.7%
Health screenings for employees dealing with the public	52.1%	68.6%
Passenger health screenings (at airports)	47.1%	69.3%
Published cleaning/disinfecting protocols	47.7%	65.5%
Passenger health screenings (on cruises)	41.8%	70.2%
Limitations to crowd sizes/visitor capacity	44.5%	65.4%
Rules for customer physical interactions	36.8%	52.9%
Customer-facing staff required to wear PPE (masks, gloves etc.)	37.3%	51.4%
Customers encouraged to wear PPE (masks, gloves etc.)	30.4%	49.7%

Desired Practices in Commercial Public Places

Question: When thinking about visiting **COMMERCIAL PUBLIC LOCATIONS** (theme parks, concert or sports venues, shopping malls, etc.), what operational practices will you want to see used? (Select all that apply)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7

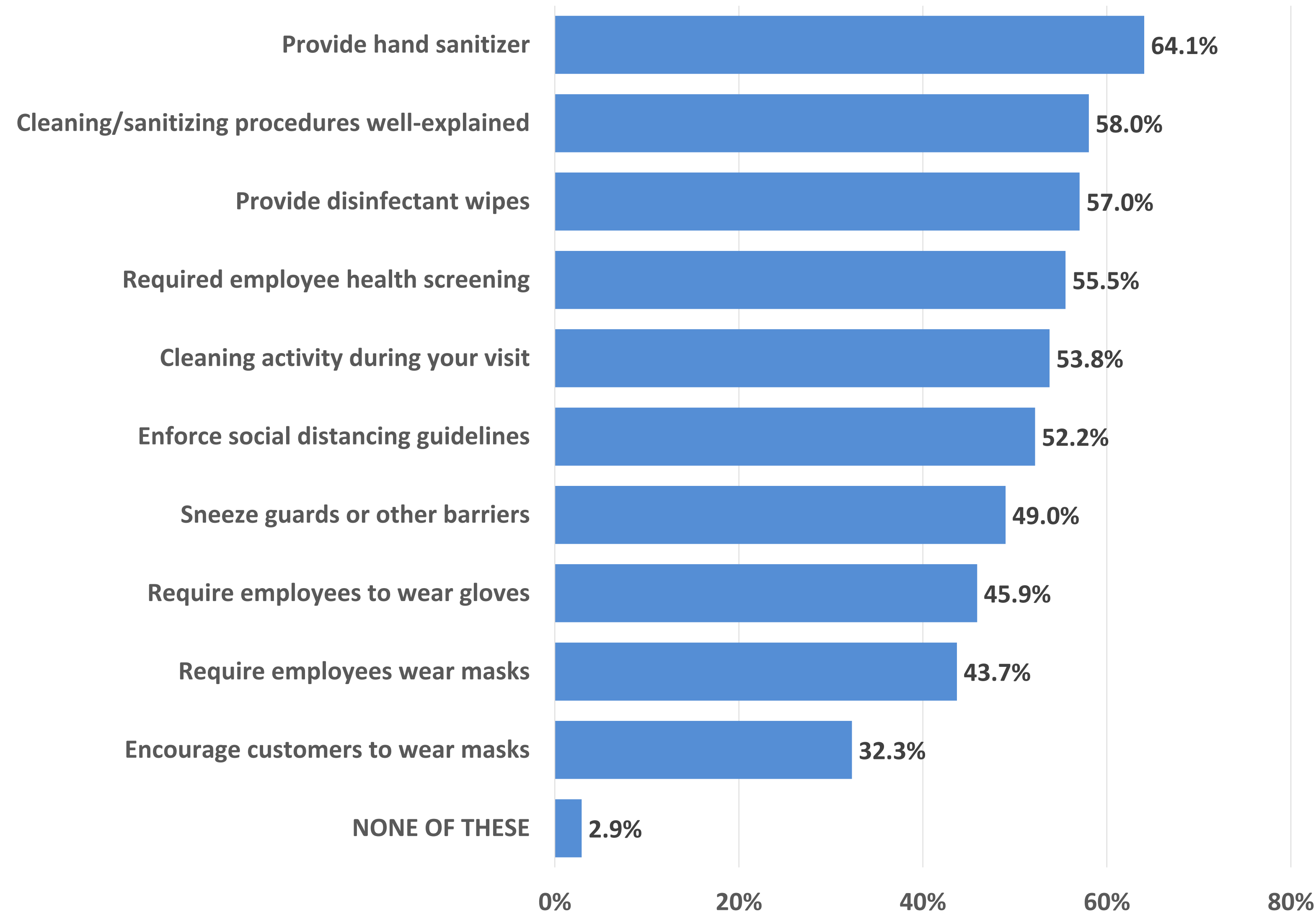


Desired Practices in Restaurants

Question: When thinking about dining in RESTAURANTS what operational practices will you want to see used? (Select all that apply)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7



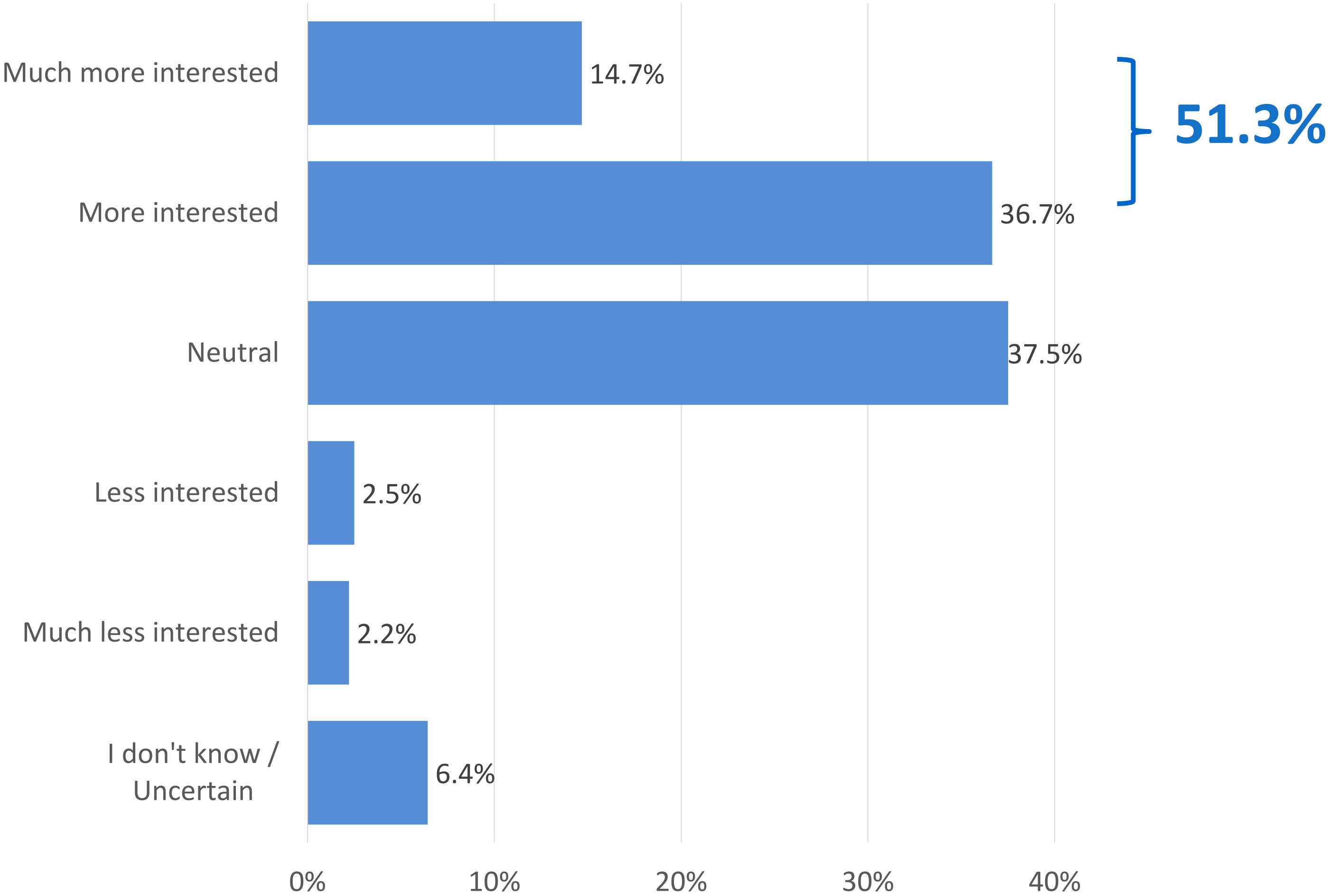
Official Coronavirus Health & Safety Certification

Question: All else equal, if a business such as a hotel, attraction or restaurant was issued an official "Coronavirus Health and Safety Certification", how would that affect your interest in visiting?

I would be _____

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7



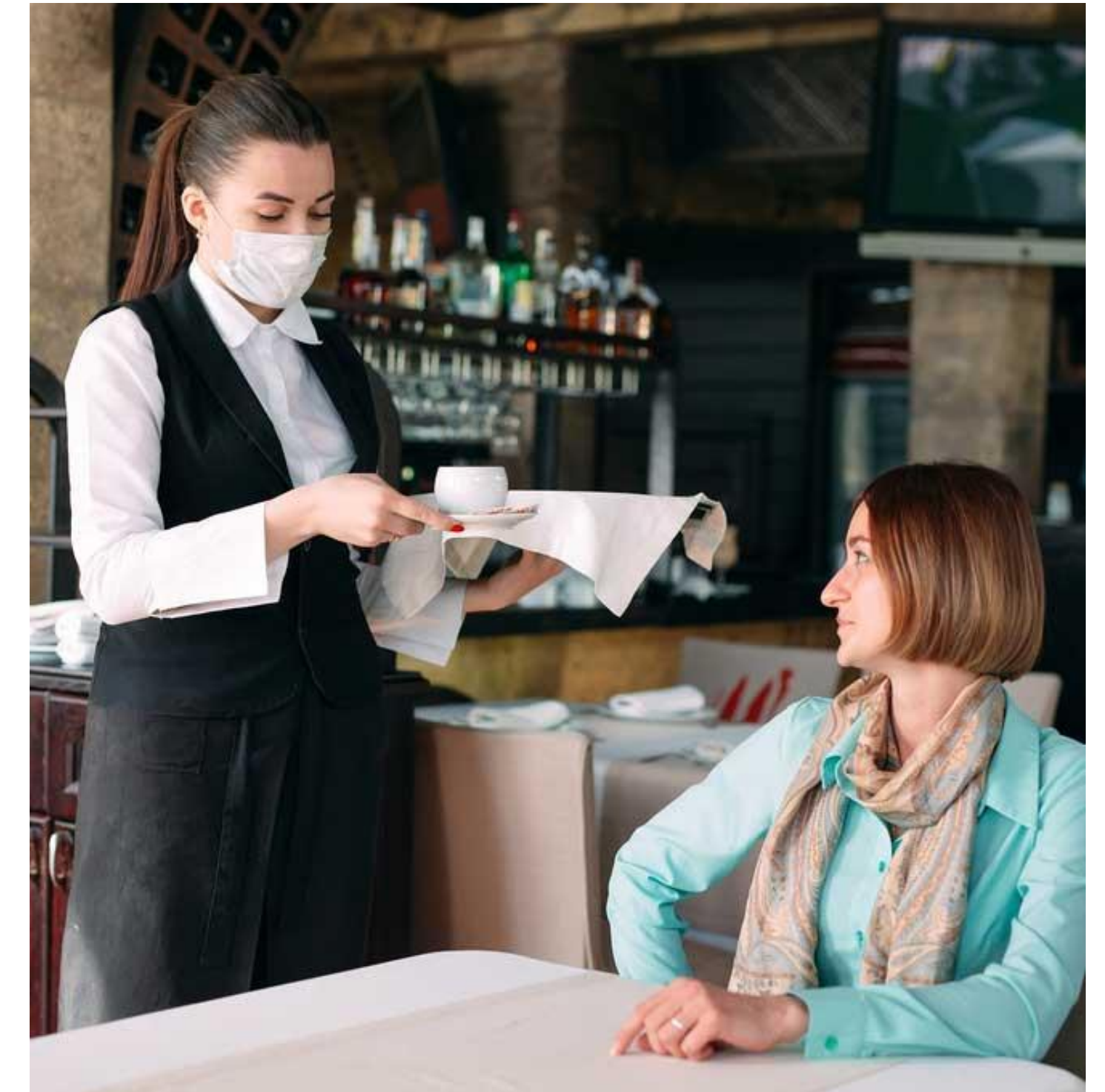
In Summary

Travelers will likely expect significant changes to business operating practices in coming months.

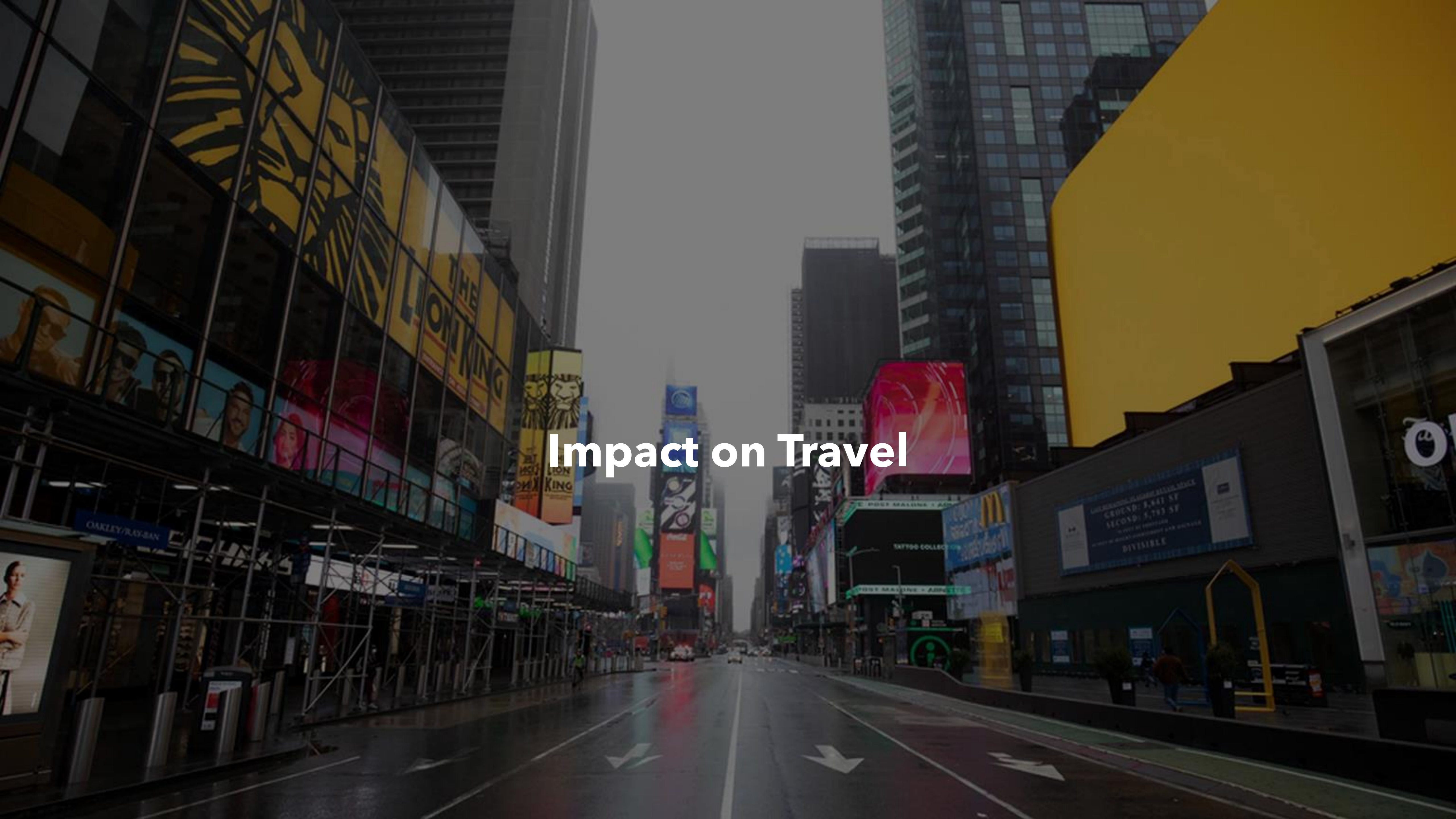
Beyond easy fixes like making hand sanitizers and wipes available, they'll likely want more:

- **Clear sanitary guidelines**
- **Social distancing protocols**
- **Health screenings for front-line employees**
- **PPE for front-line employees**

Question: How feasible will all this be for businesses already struggling with lost revenues?

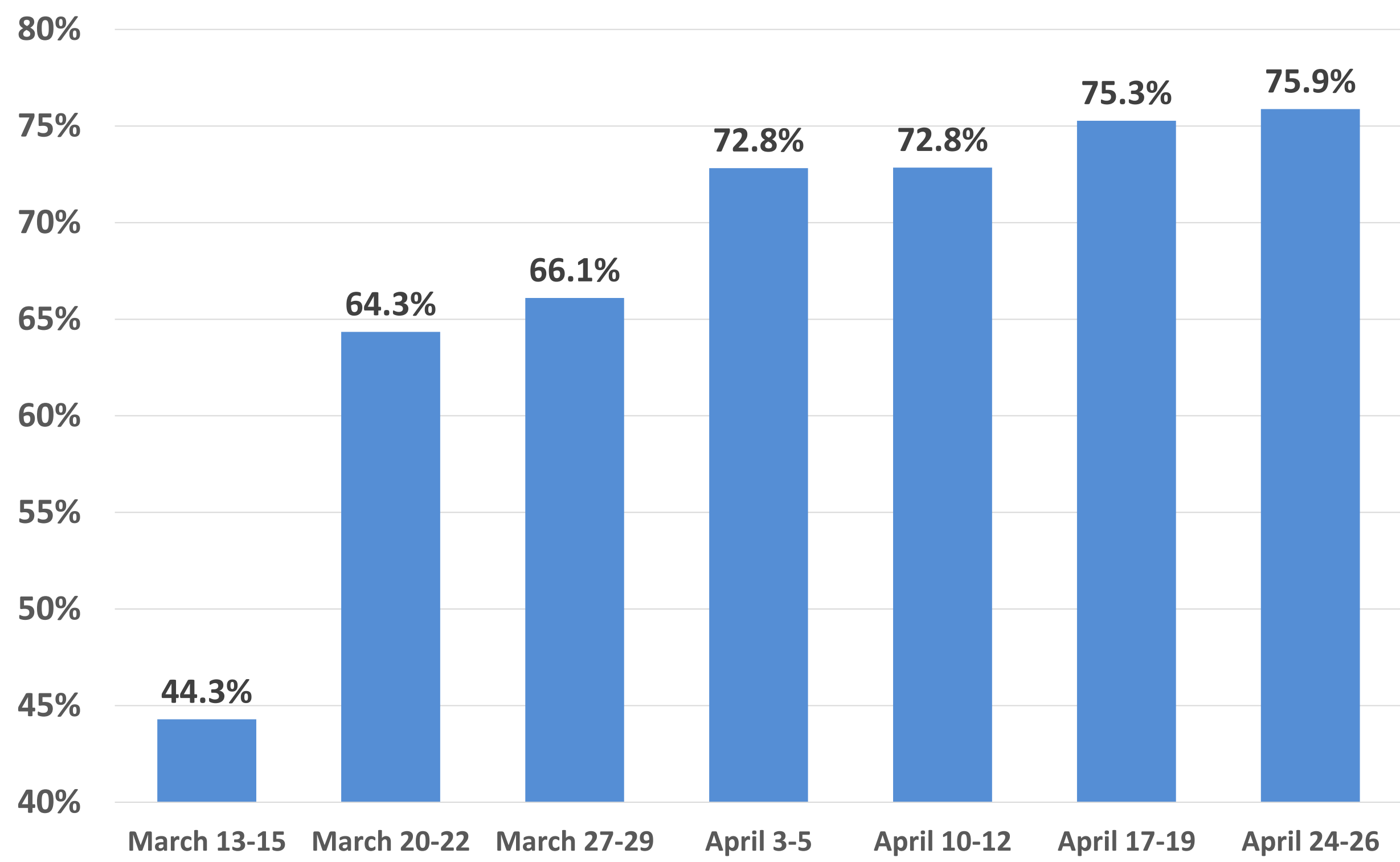
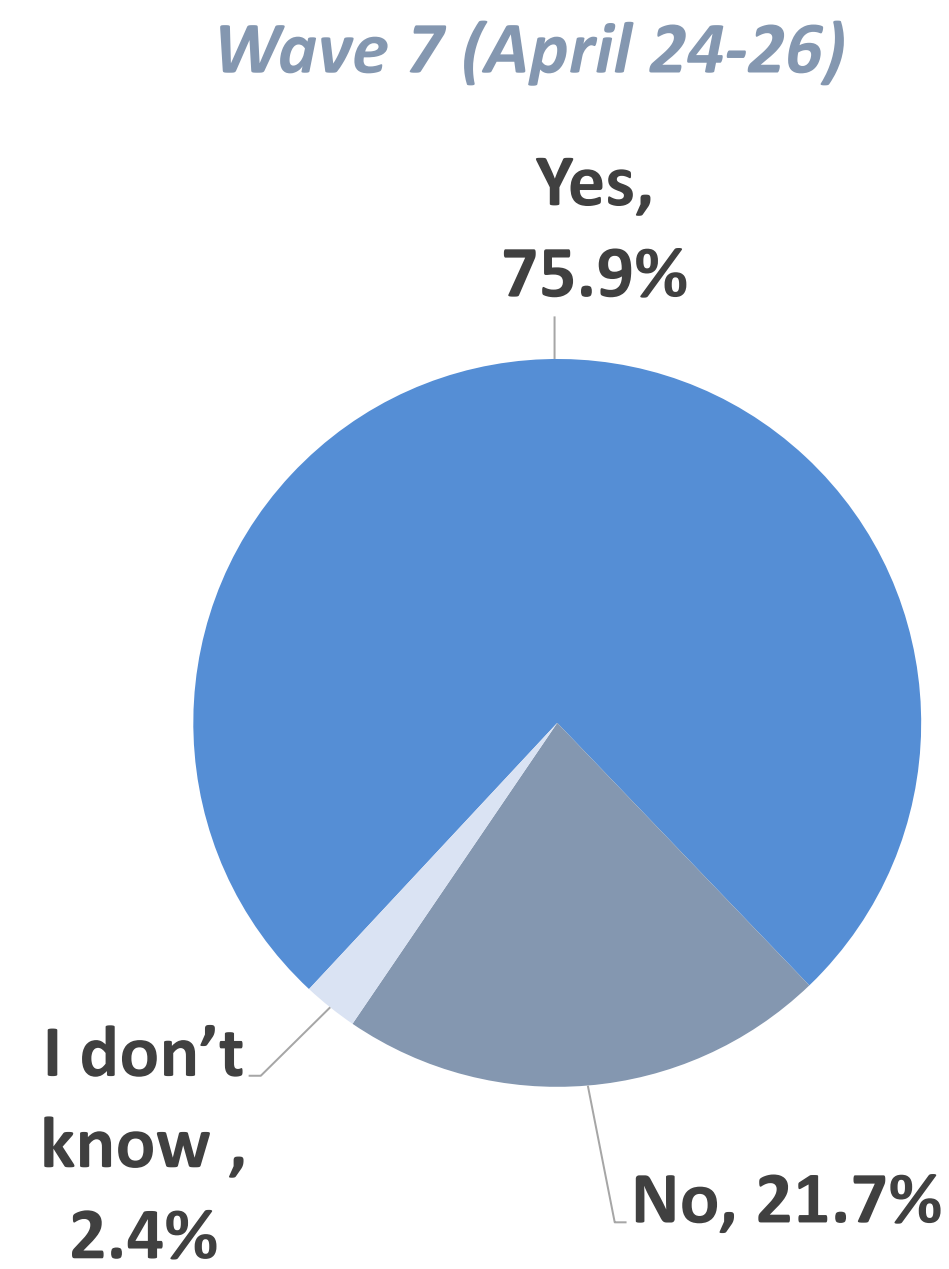


Impact on Travel



Impact of the Coronavirus on Travel

Question: Has the current coronavirus situation affected your travel in any way? (Please consider all your travel--leisure, business, group meeting, etc.)



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

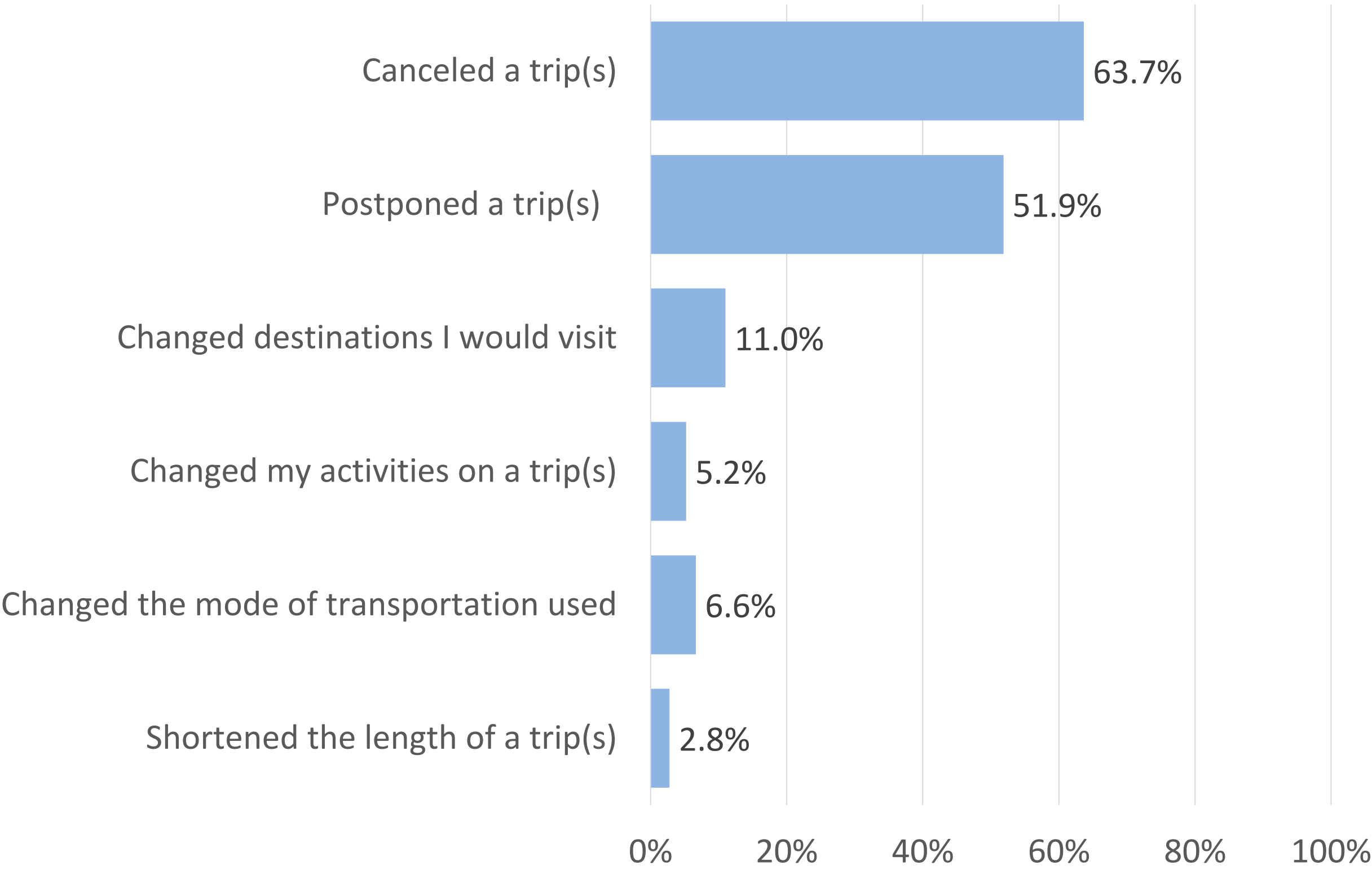
How the Coronavirus has Impacted Travel

Question: How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have_____.

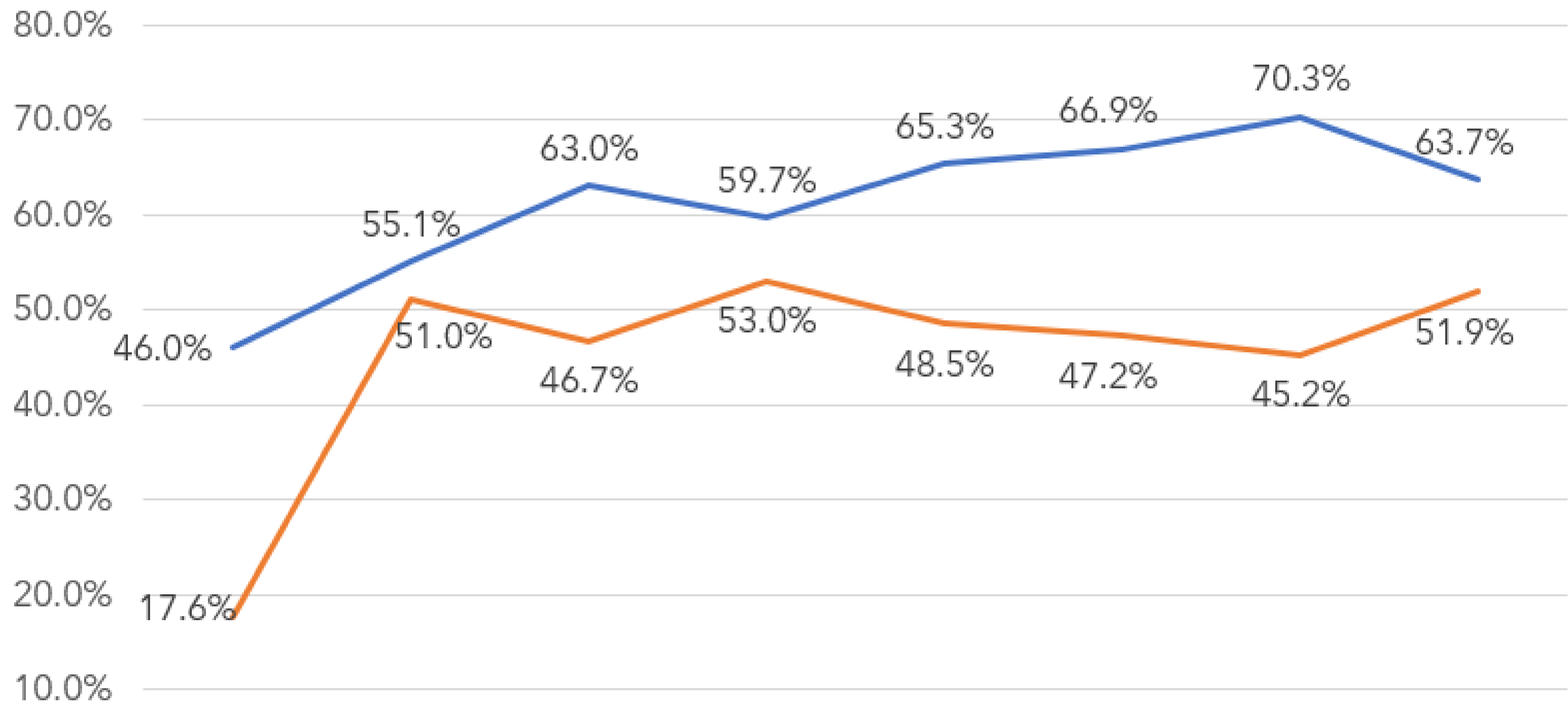
(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795, 890, 937, 929 and 903 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 , 10-12, 17-19 and 24-26, 2020)

Wave 7 (April 24-26)



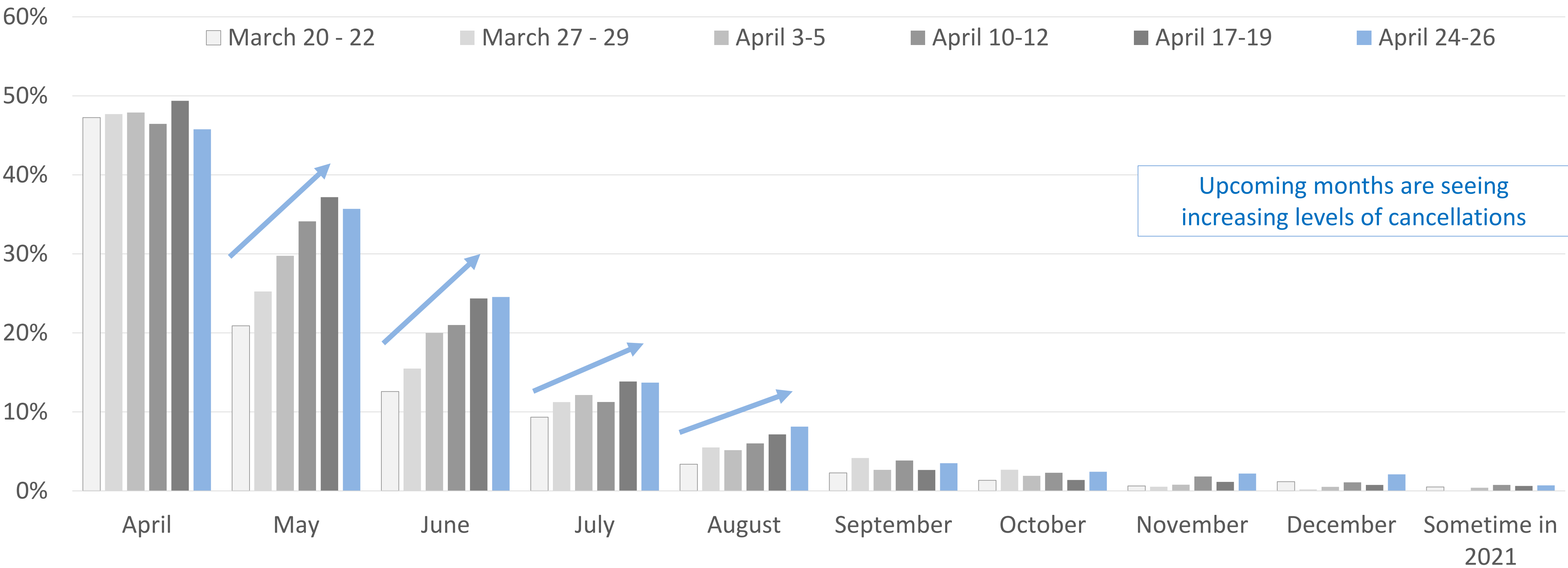
How American Travel Was Affected by the Coronavirus

Cancelled a trip Postponed a trip



Month of Trip Cancellation

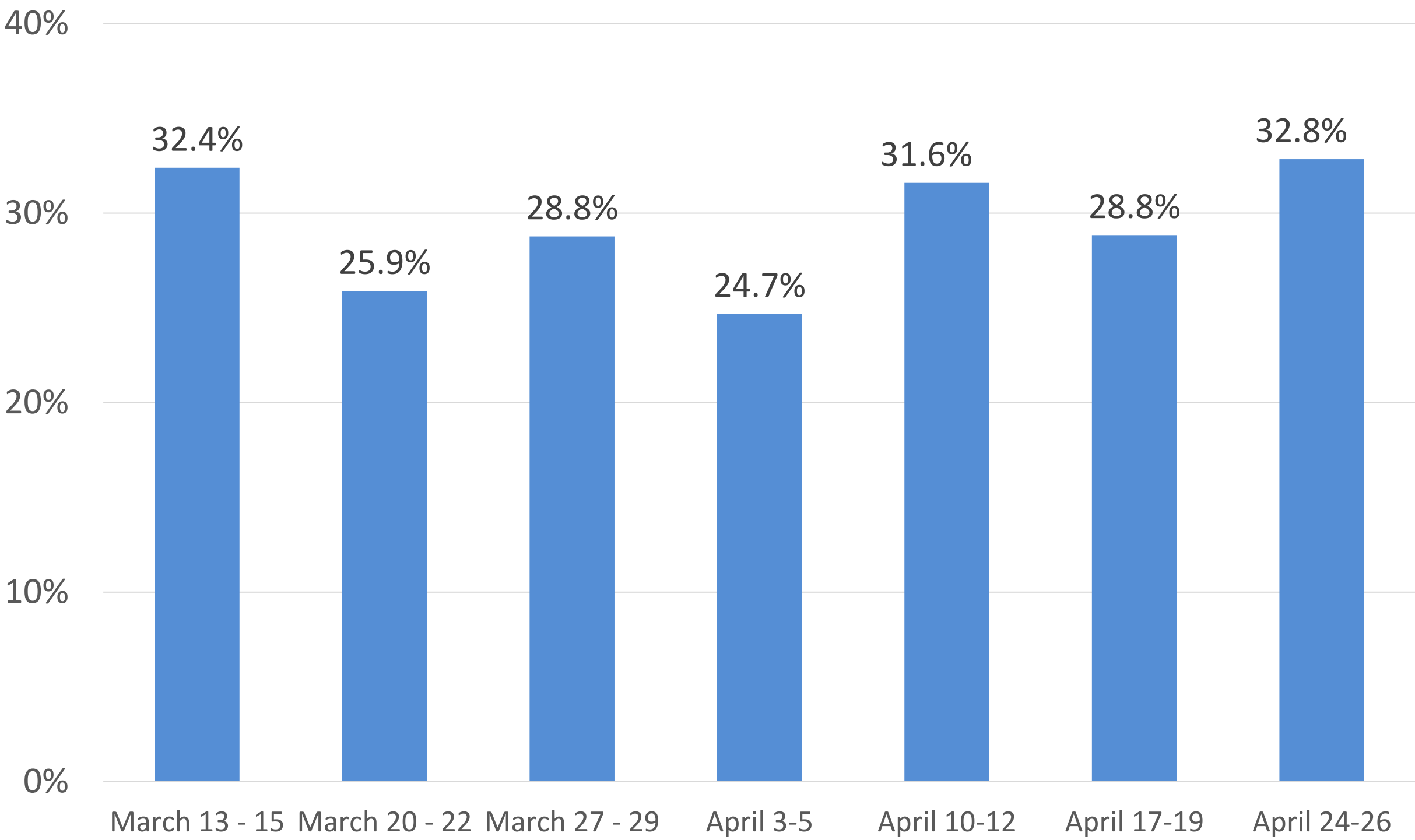
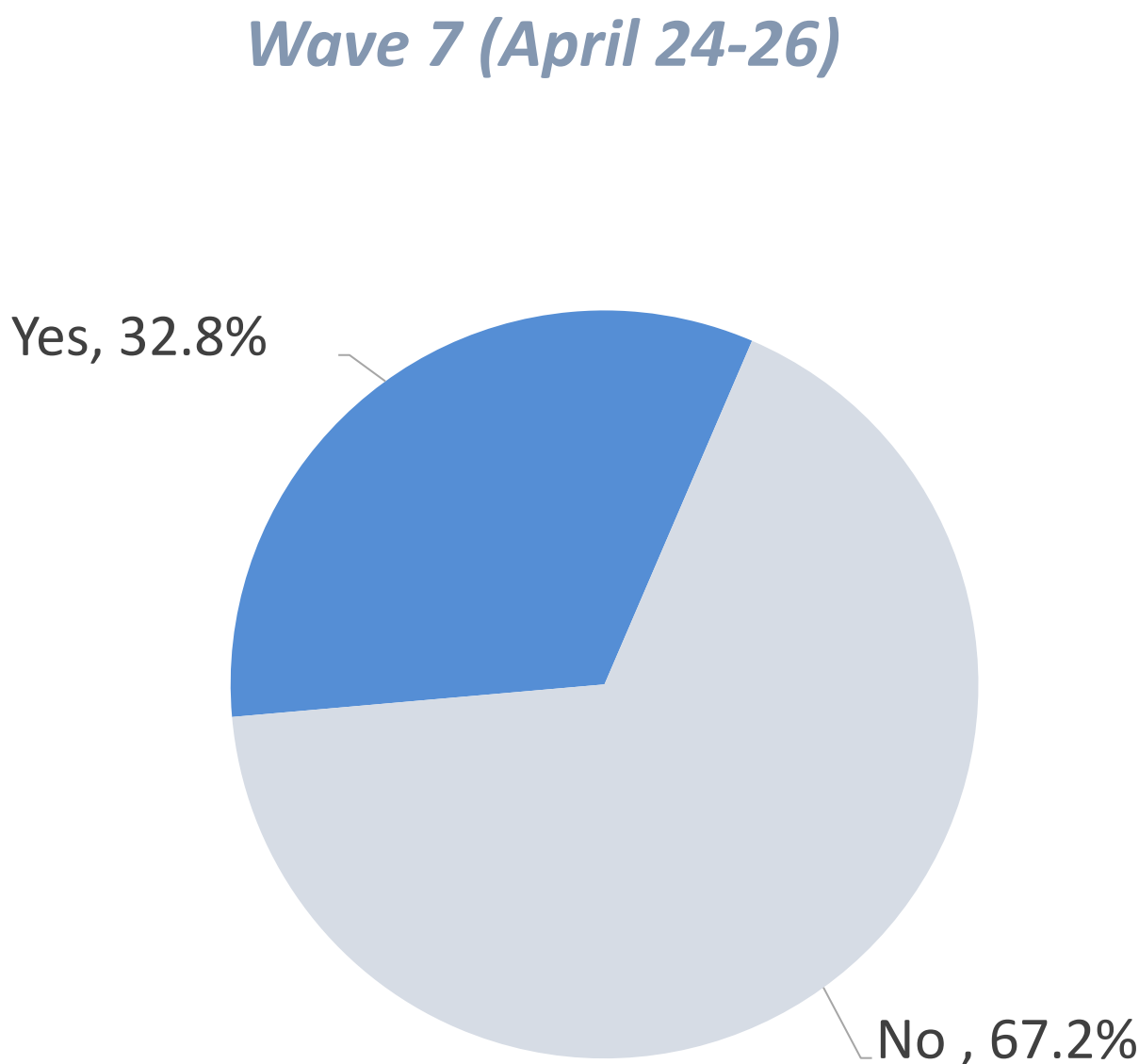
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)



(Base: Cancelling trips, 292, 477, 506, 580, 623, 643 and 582 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020. Note: Data purposefully excluded from this chart for readability.)

Were Postponed Trips Rescheduled?

Question: You said earlier that you had POSTPONED at least one trip. Have you rescheduled a date (even tentatively) for this travel?



(Base: Postponing trips, 277, 354, 404, 433, 438, 436 and 463 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

Feelings and Expectations for Travel

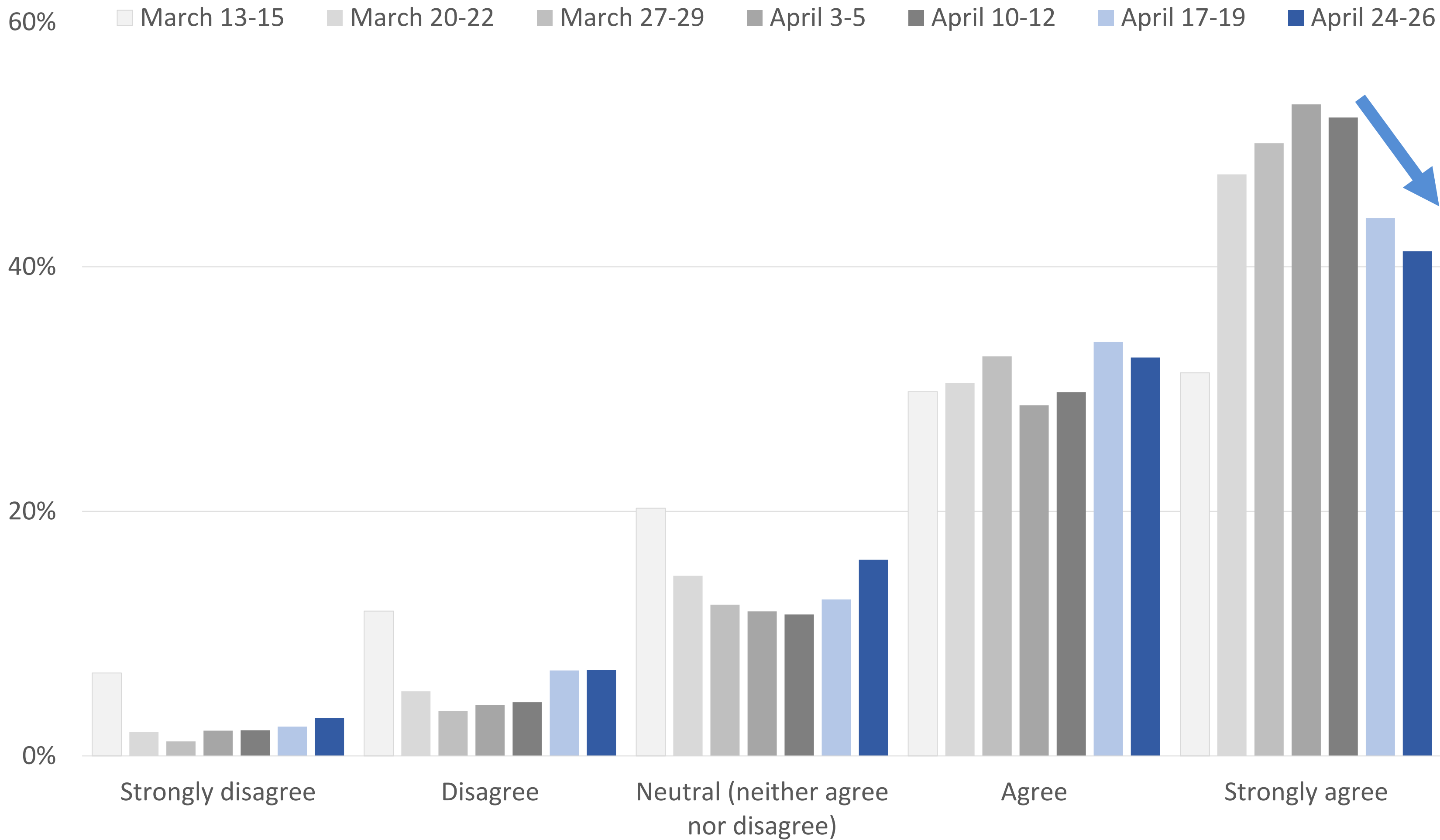


Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

Statement: I’m planning to avoid all travel until the coronavirus situation blows over.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

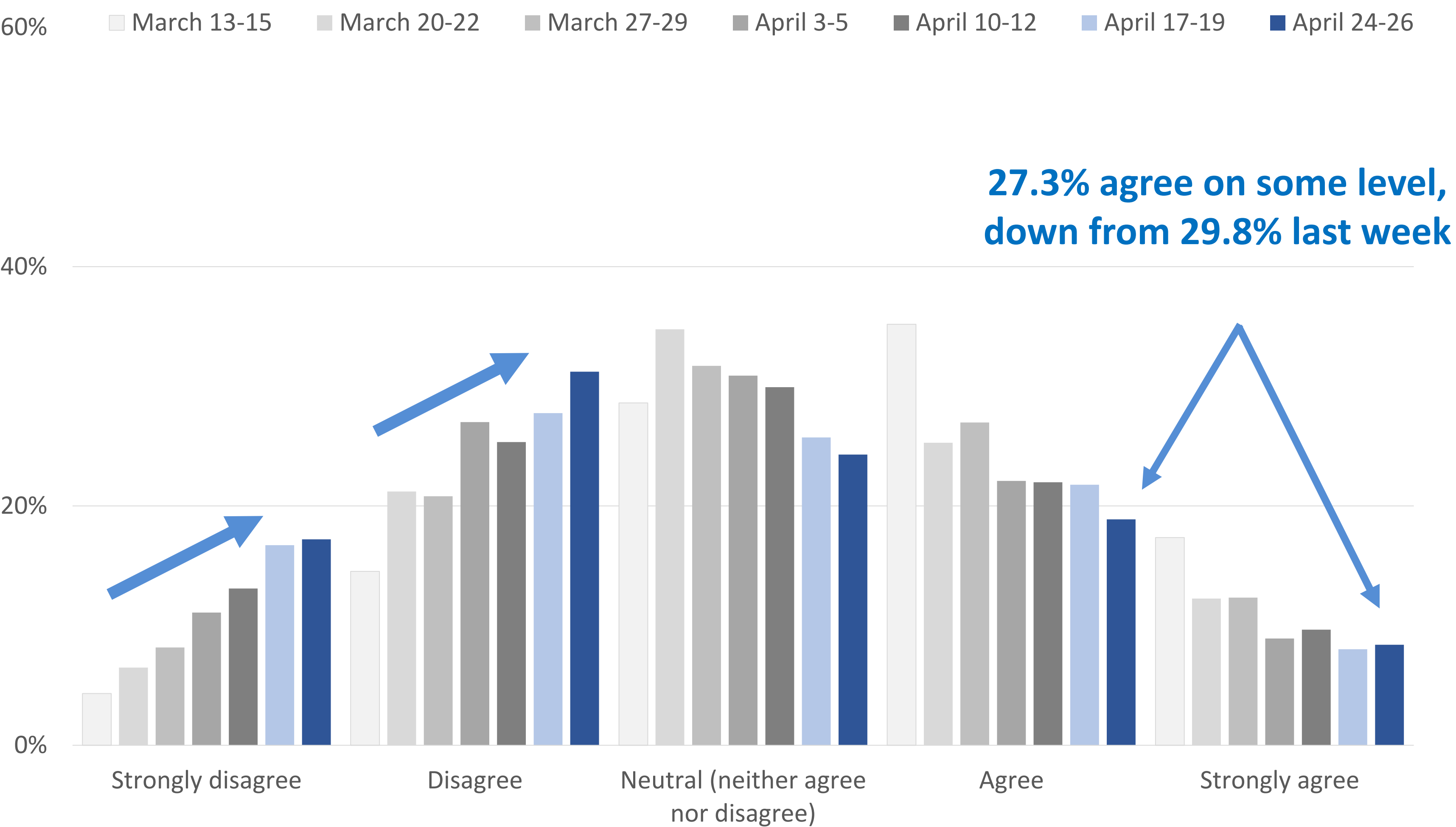


Expectations for Summer Travel Season

How much do you agree with the following statement?

Statement: I expect the coronavirus situation will be resolved before the summer travel season.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)



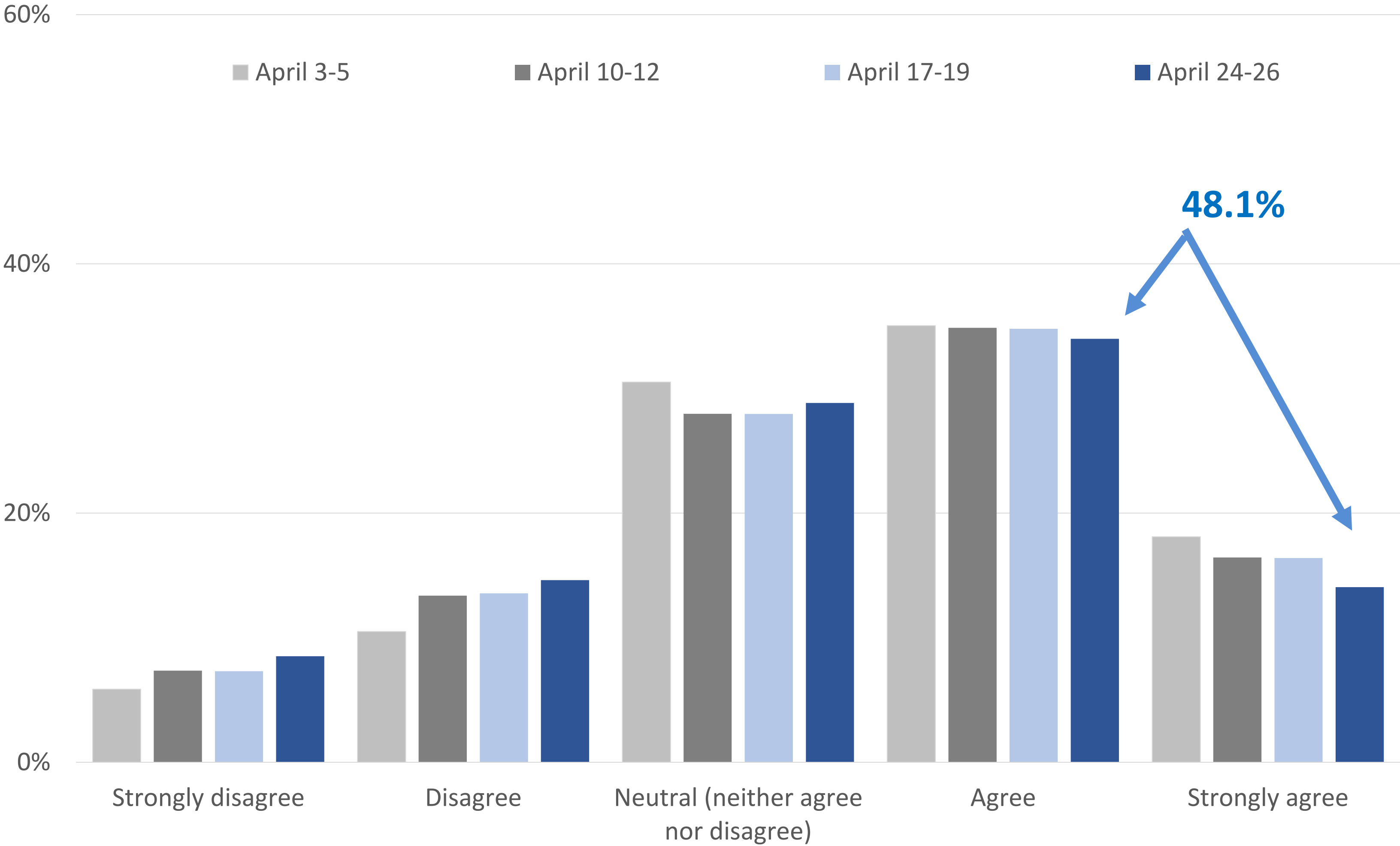
Expectations for Fall Travel Season

How much do you agree with the following statement?

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

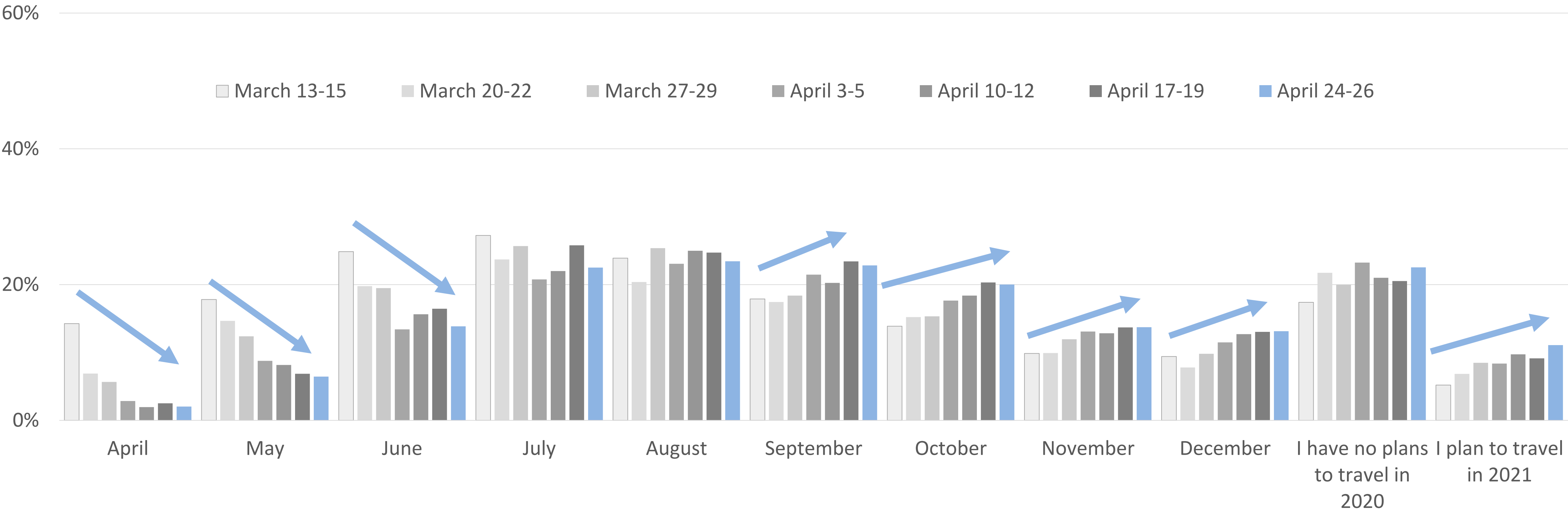
(Base: All respondents, 1,216, 1,263, 1238 and 1208 completed surveys. Data collected April 3-5, 10-12, 17-19 and 24-26, 2020)

Question Added in Wave 4



Upcoming Travel Plans

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?



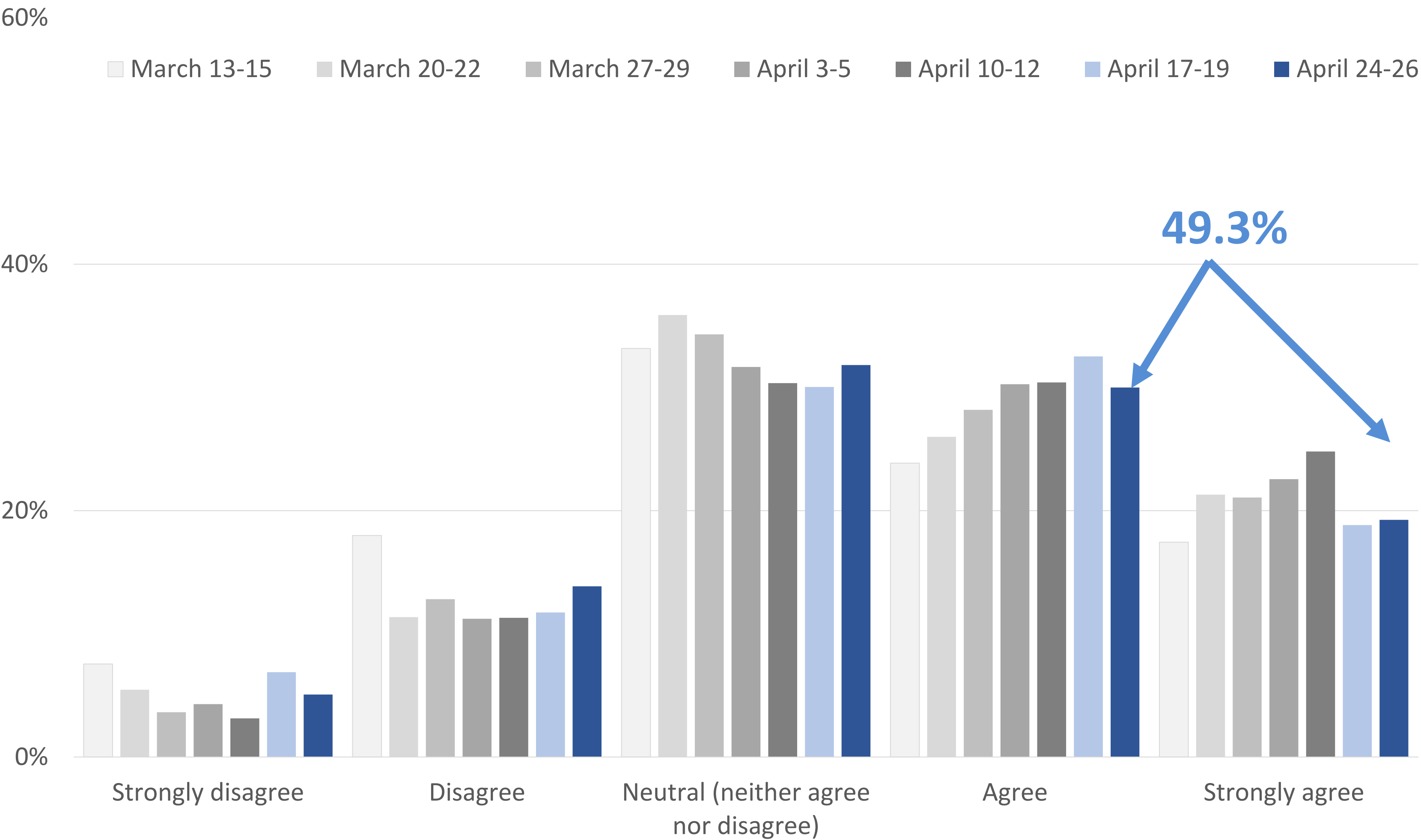
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, April 3-5, 10-12, 17-19 and 24-26, 2020)

Staycations as a Replacement for Vacations

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

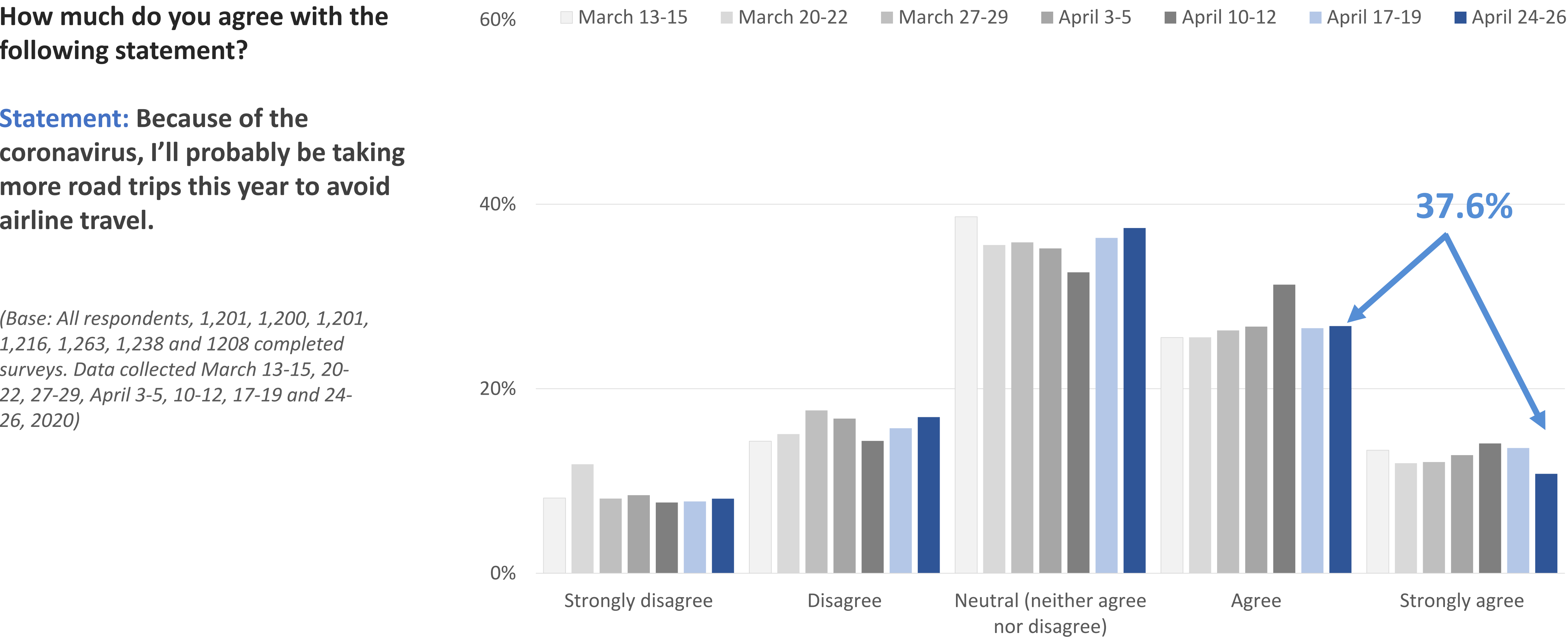


Replacing Air Travel With Road Trips

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

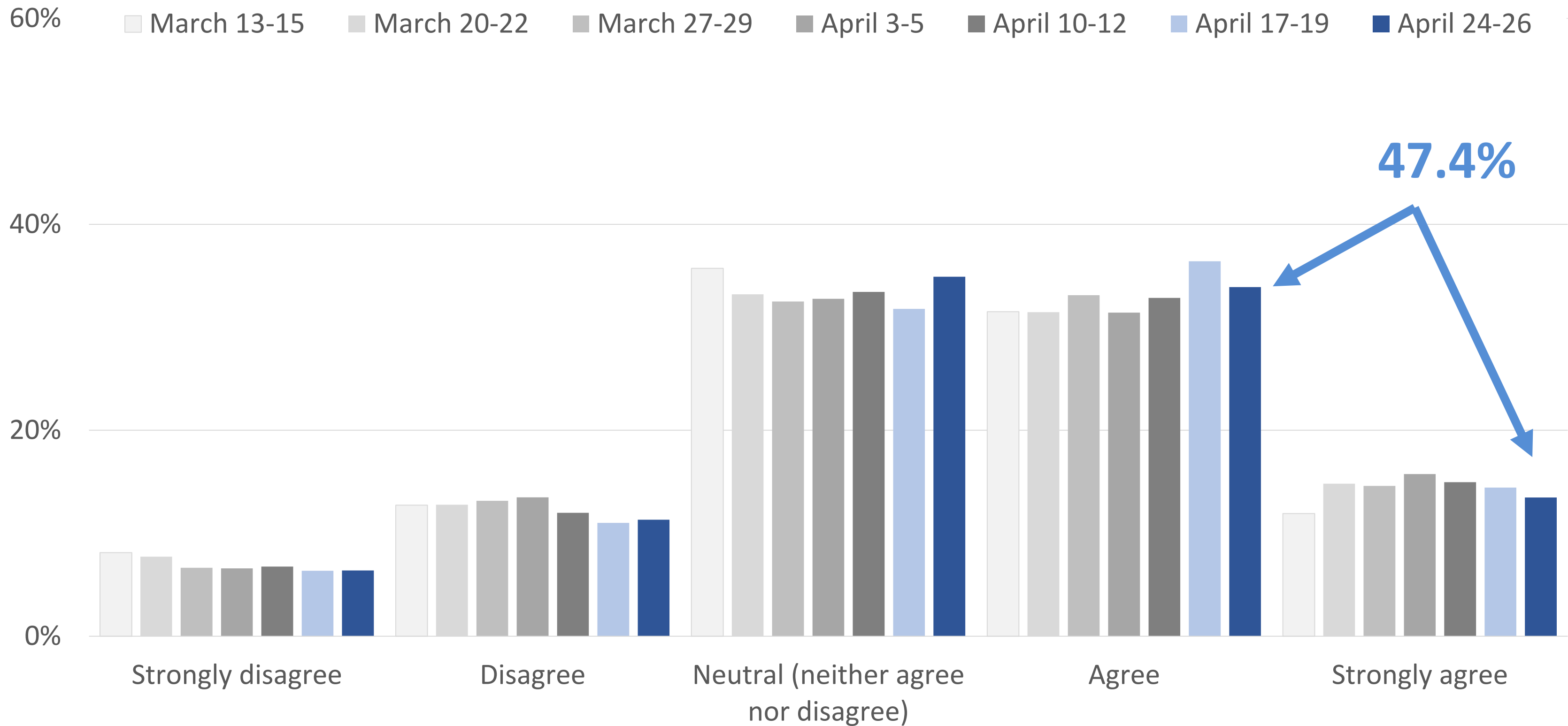


Replacing Long-Haul Travel with Regional Trips

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

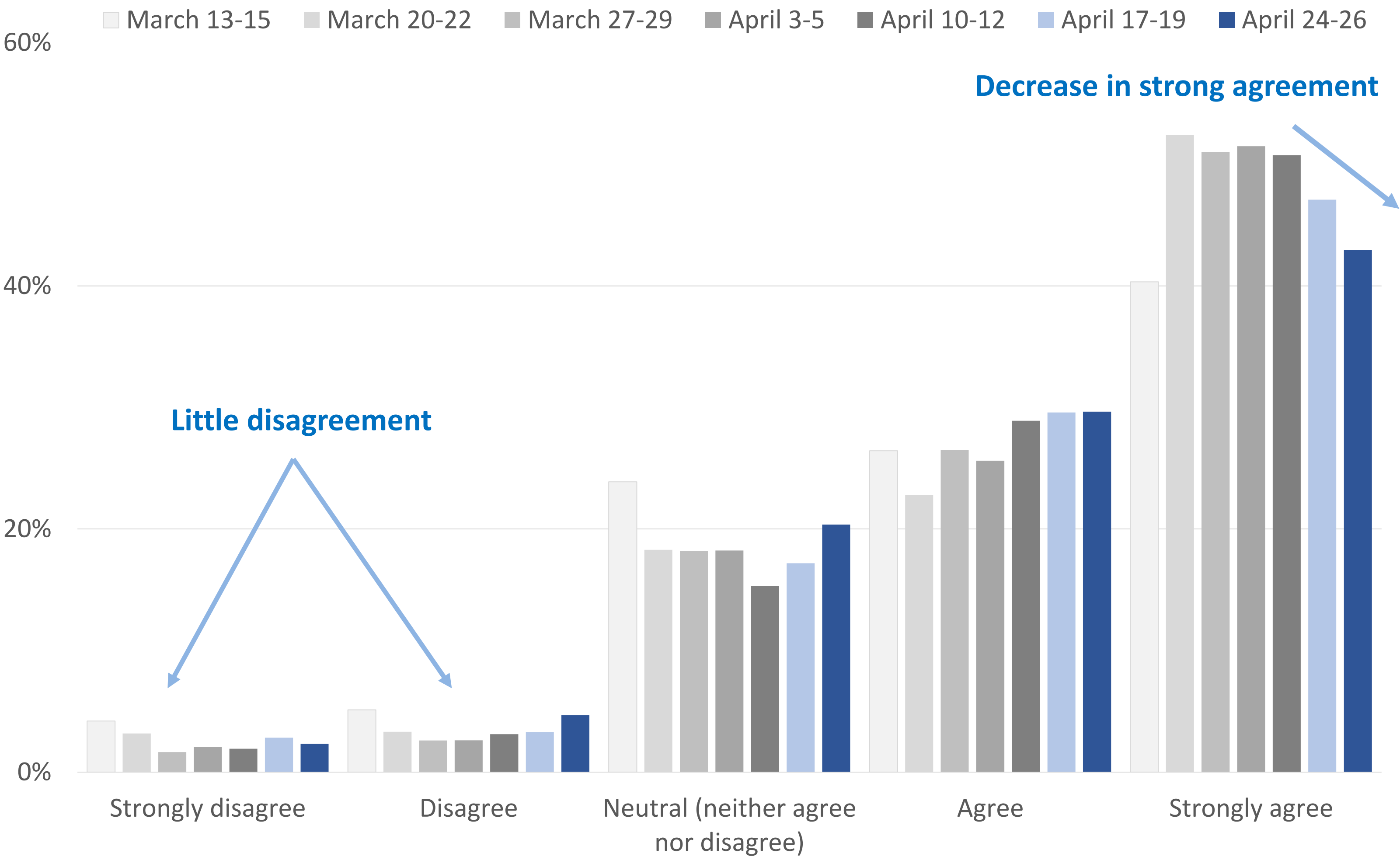


Avoiding Conventions & Conferences

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: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

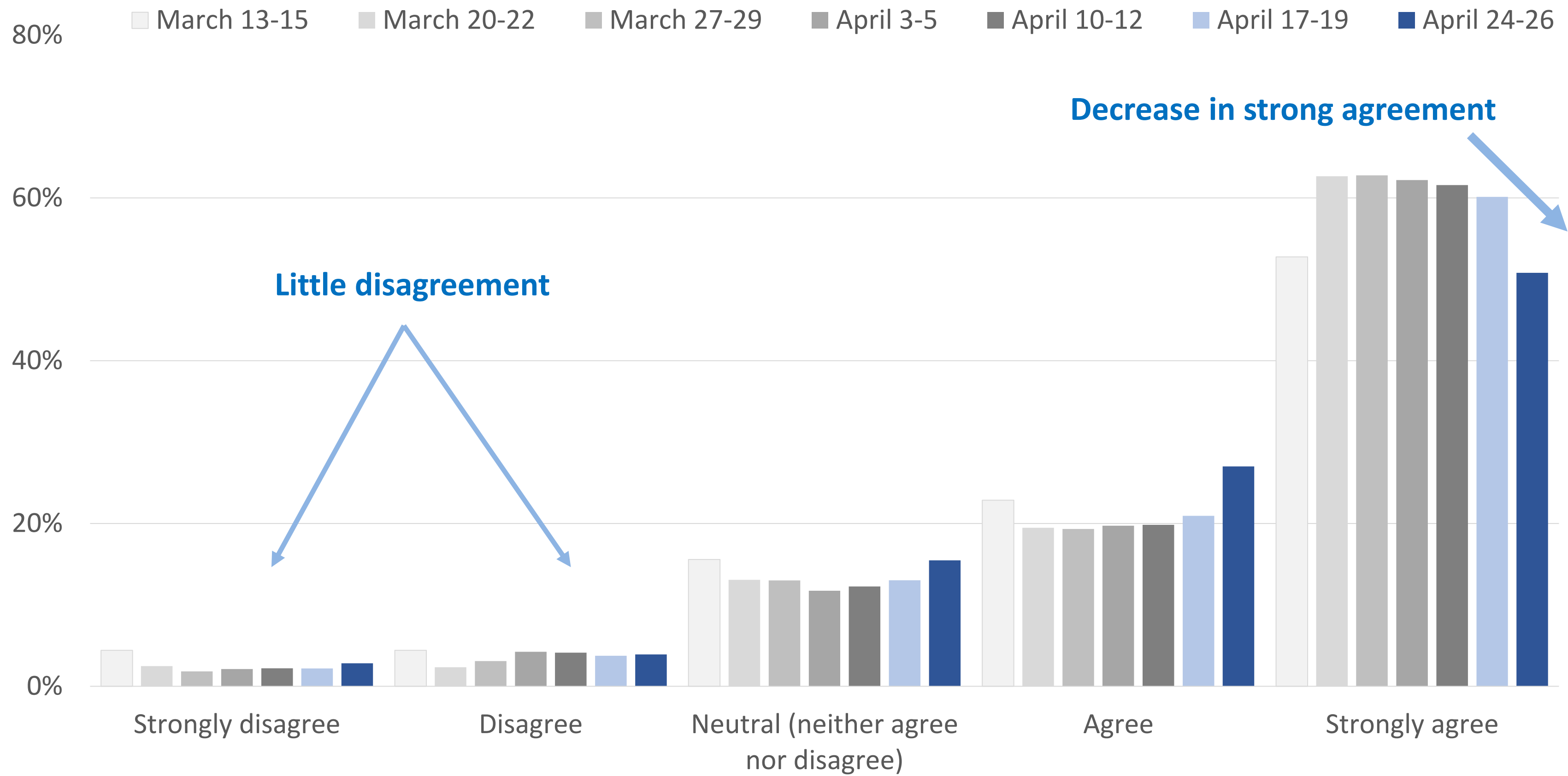


Avoiding International Travel

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: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

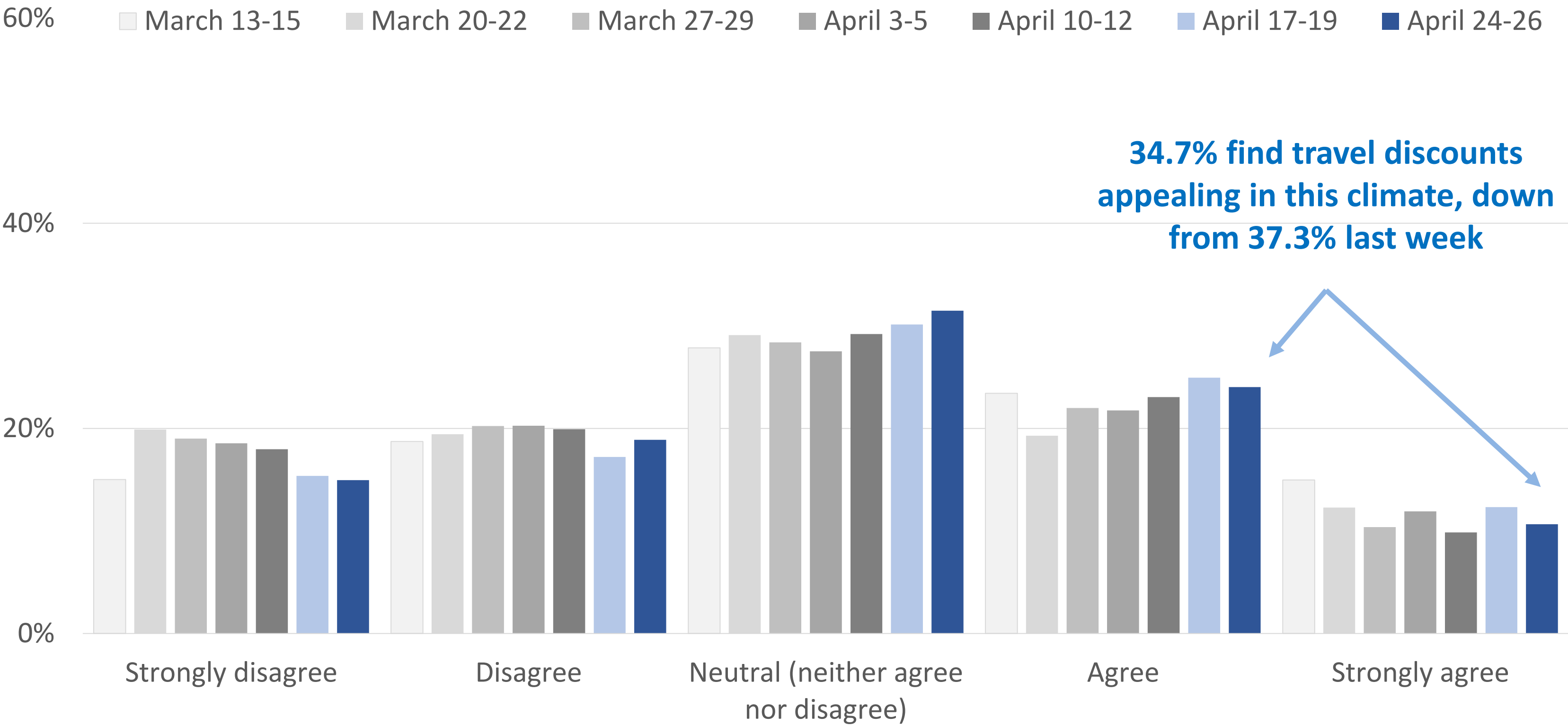


Discounts and Price Cuts

How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1208 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

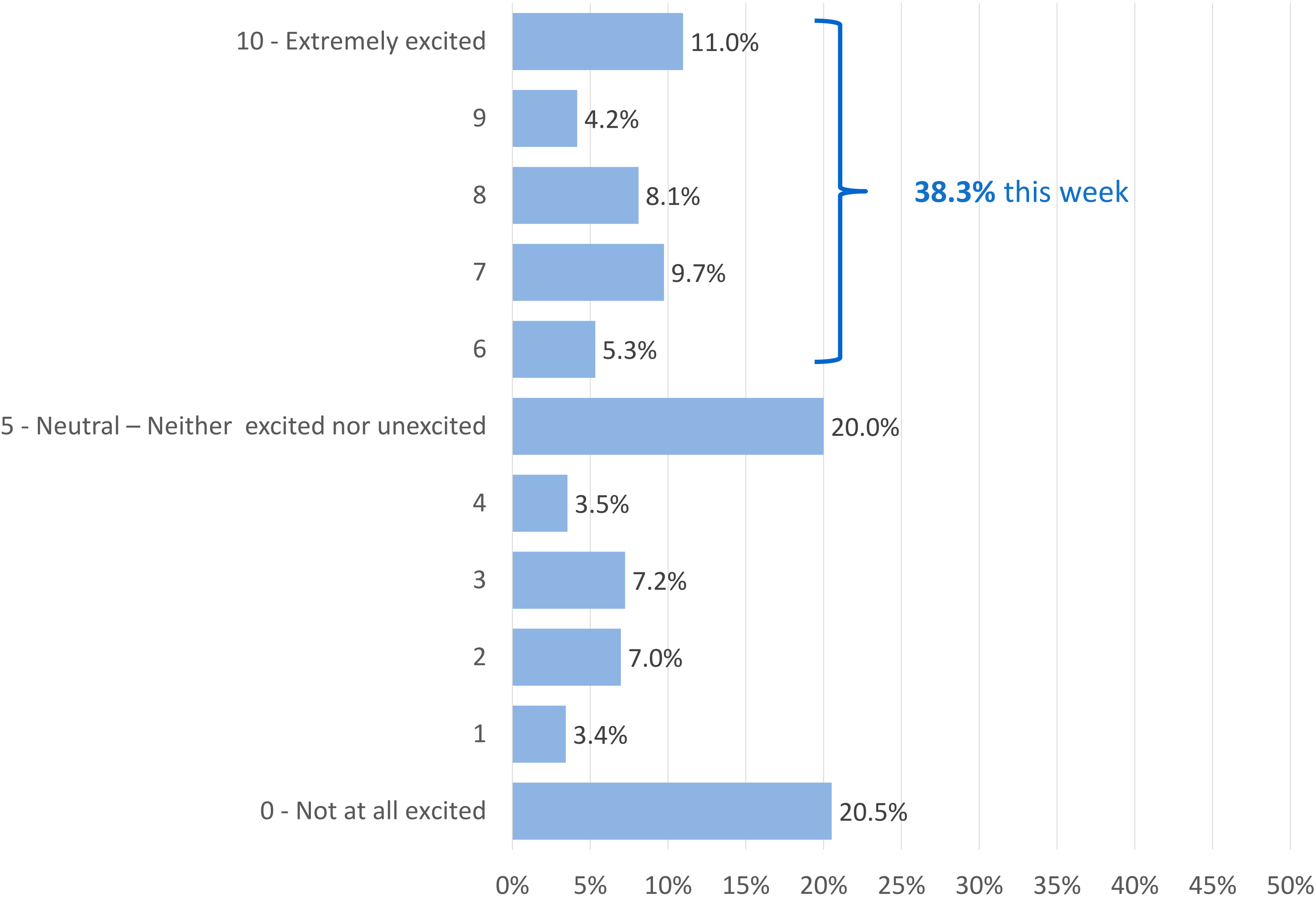


Excitement to Travel Now

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: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, April 3-5, 10-12 and 17-19 and 24-26, 2020)

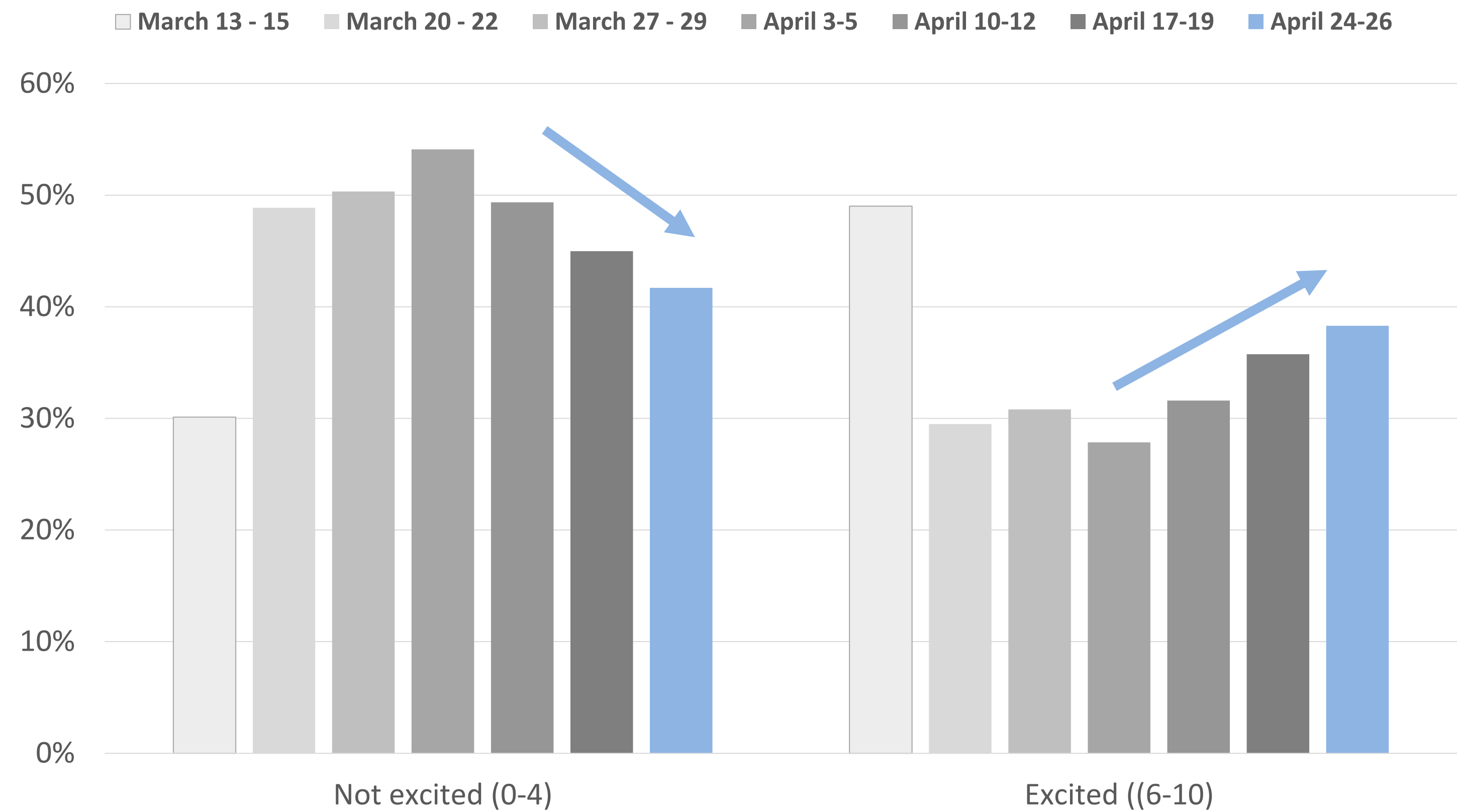


Excitement to Travel Now (Excited vs. Not Excited)

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)

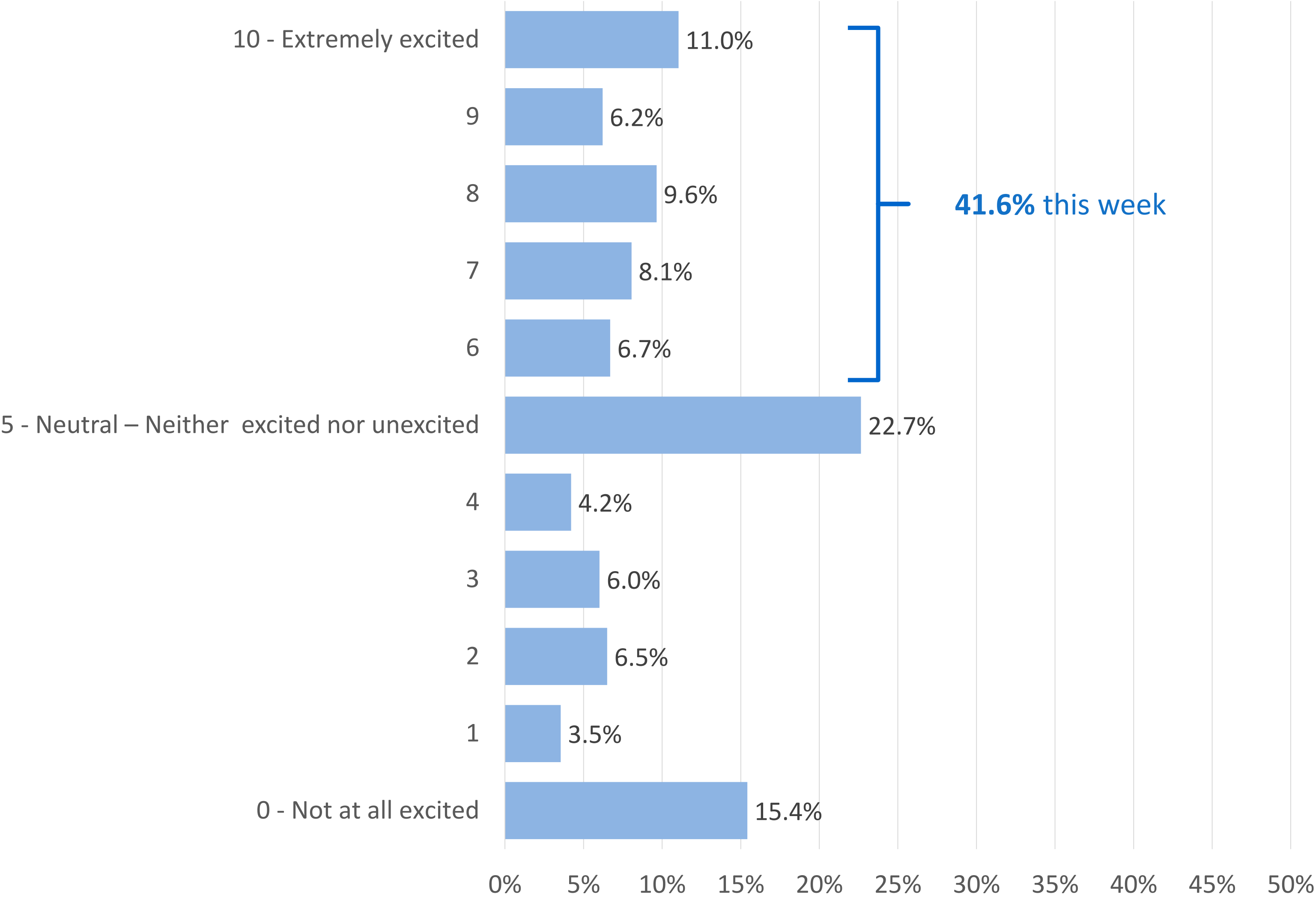
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, April 3-5, 10-12 and 17-19 and 24-26, 2020)



Openness to Travel Information

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

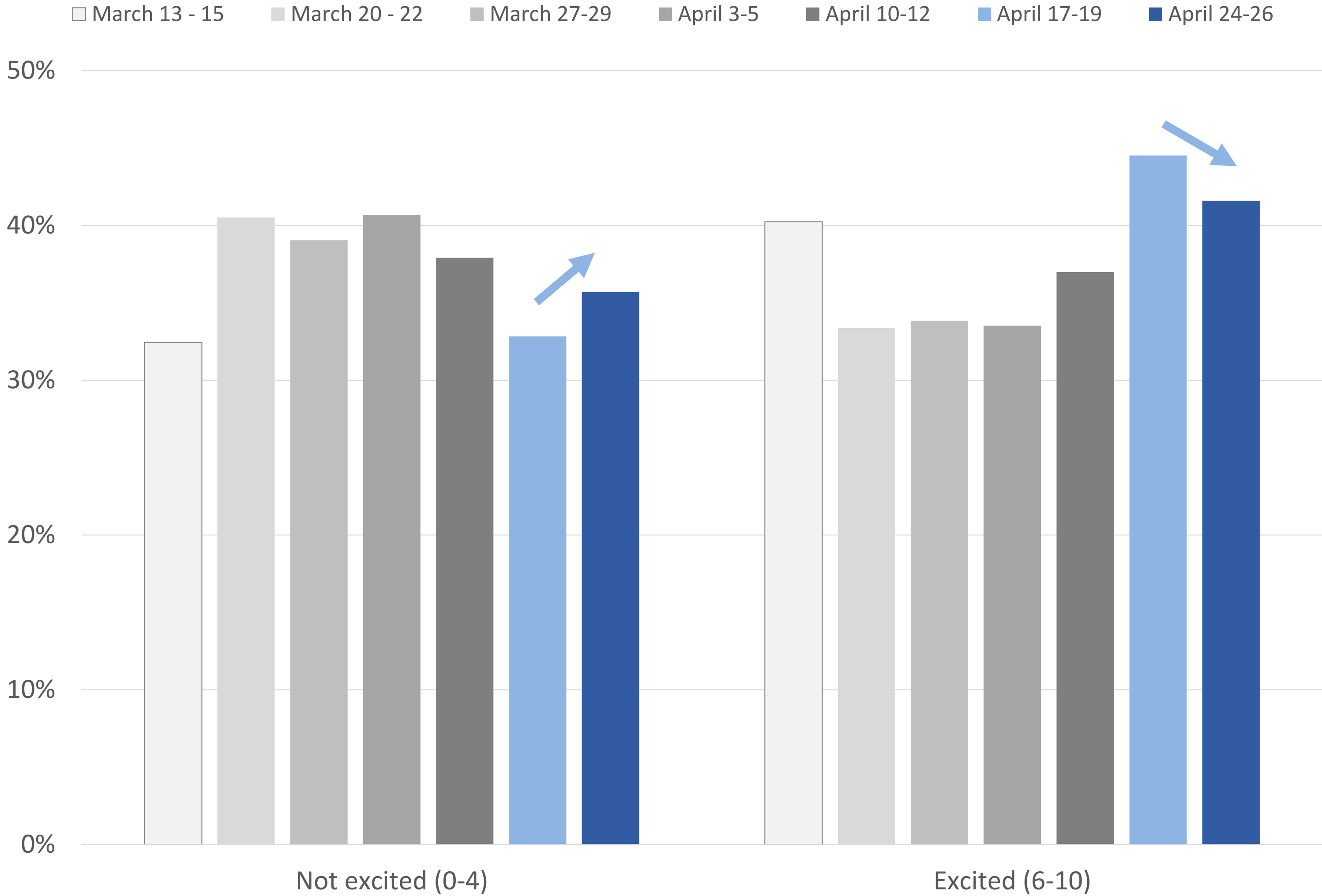
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, April 3-5, 10-12 and 17-19 and 24-26, 2020)



Openness to Travel Information (Excited vs. Not Excited)

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 13-15, 20-22, April 3-5, 10-12 and 17-19 and 24-26, 2020)





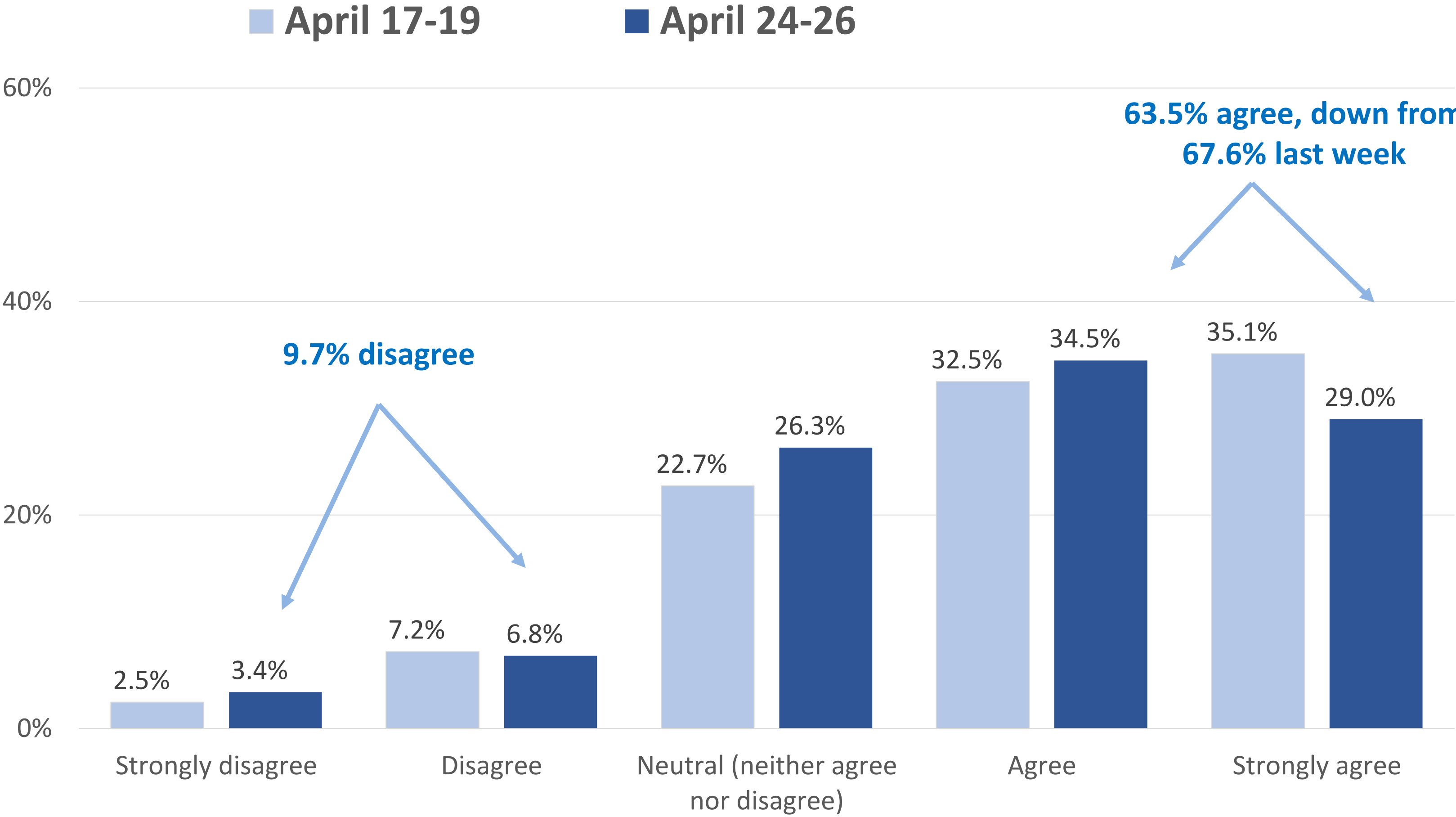
Travelers in Community are Unwanted

How much do you agree with the following statement?

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

(Base: All respondents, 1,238 and 1,208 completed surveys. Data collected April 17-19 and 24-26, 2020)

Question Added in Wave 6

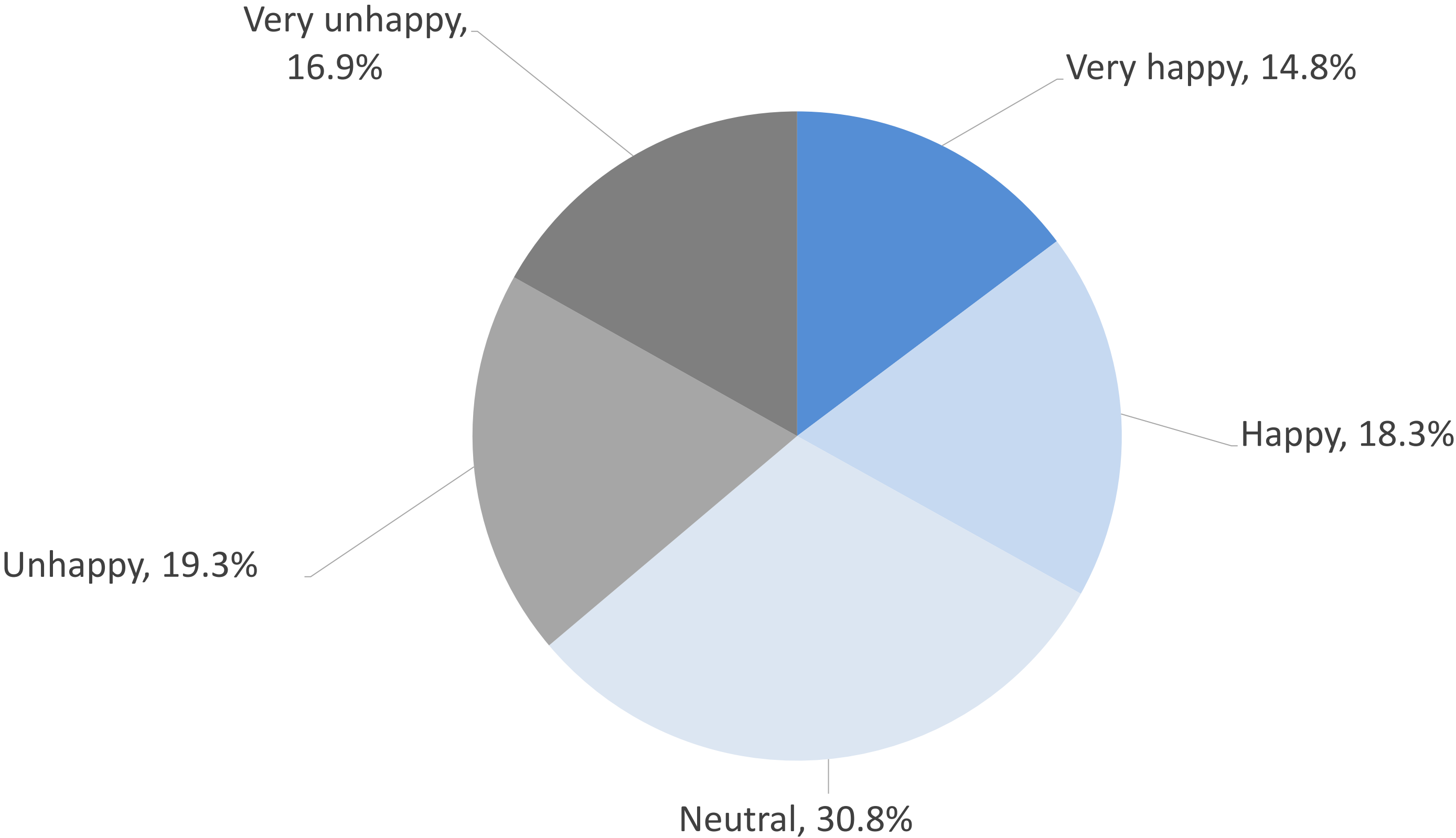


On Seeing Advertisements for Their Home Communities

Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

Question Added in Wave 7





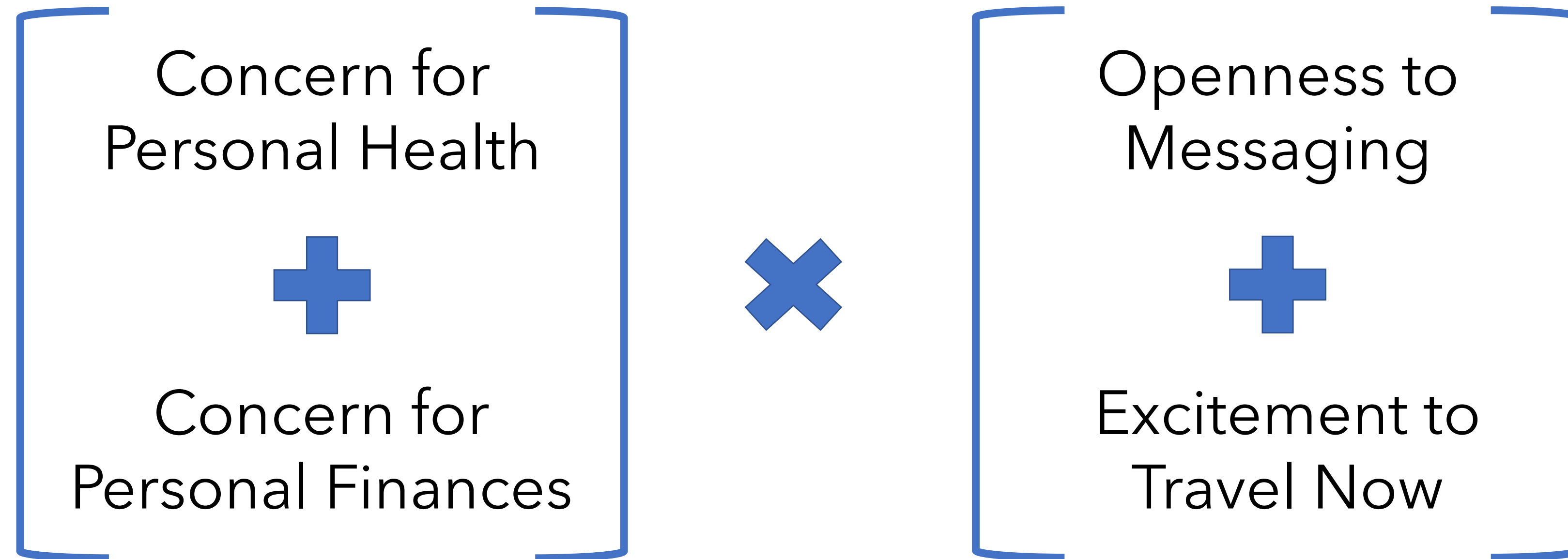


Coronavirus Travel Sentiment Index

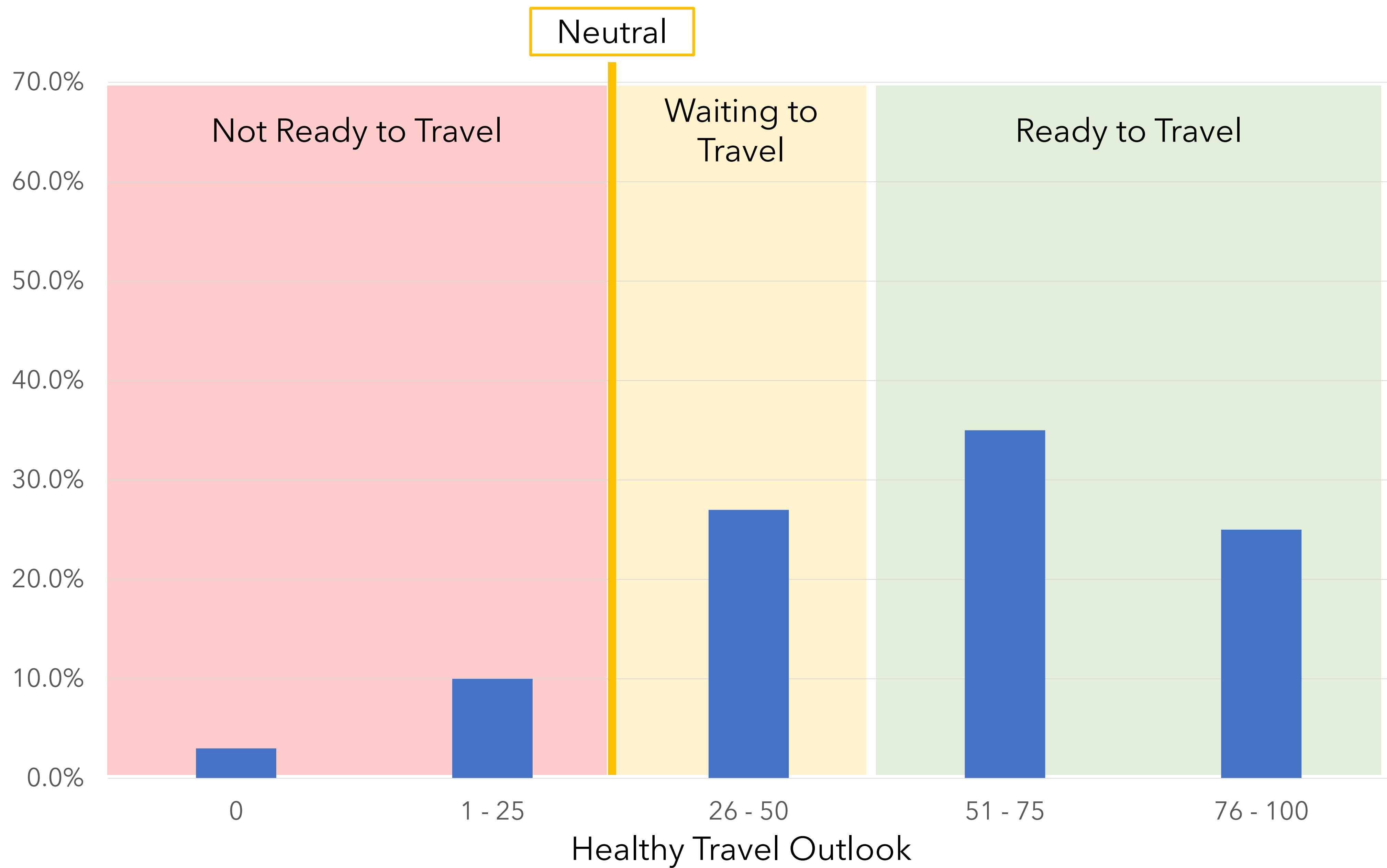
Measuring the Potential Influence of Travel Marketing

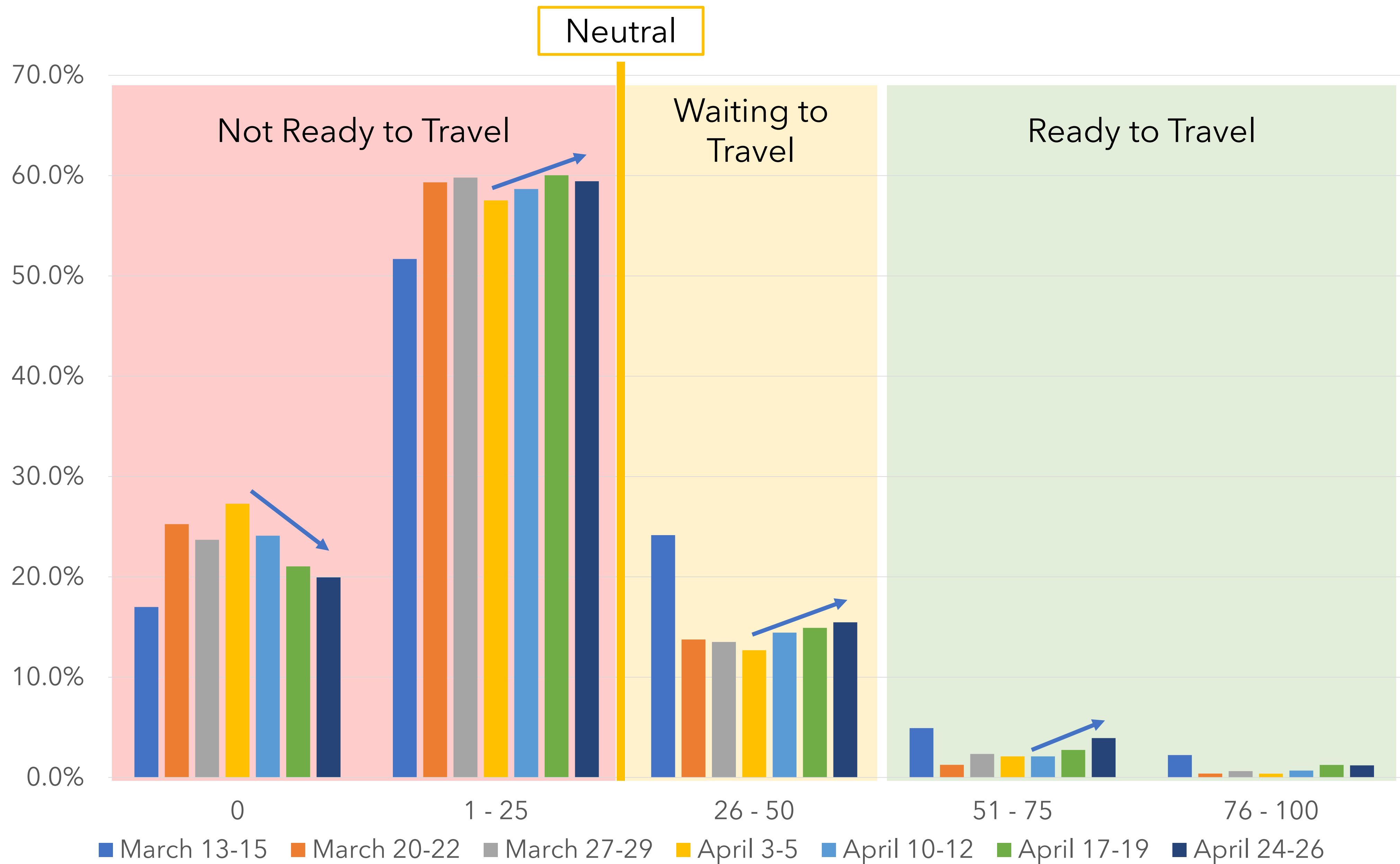
Highlights from the Week of April 27th

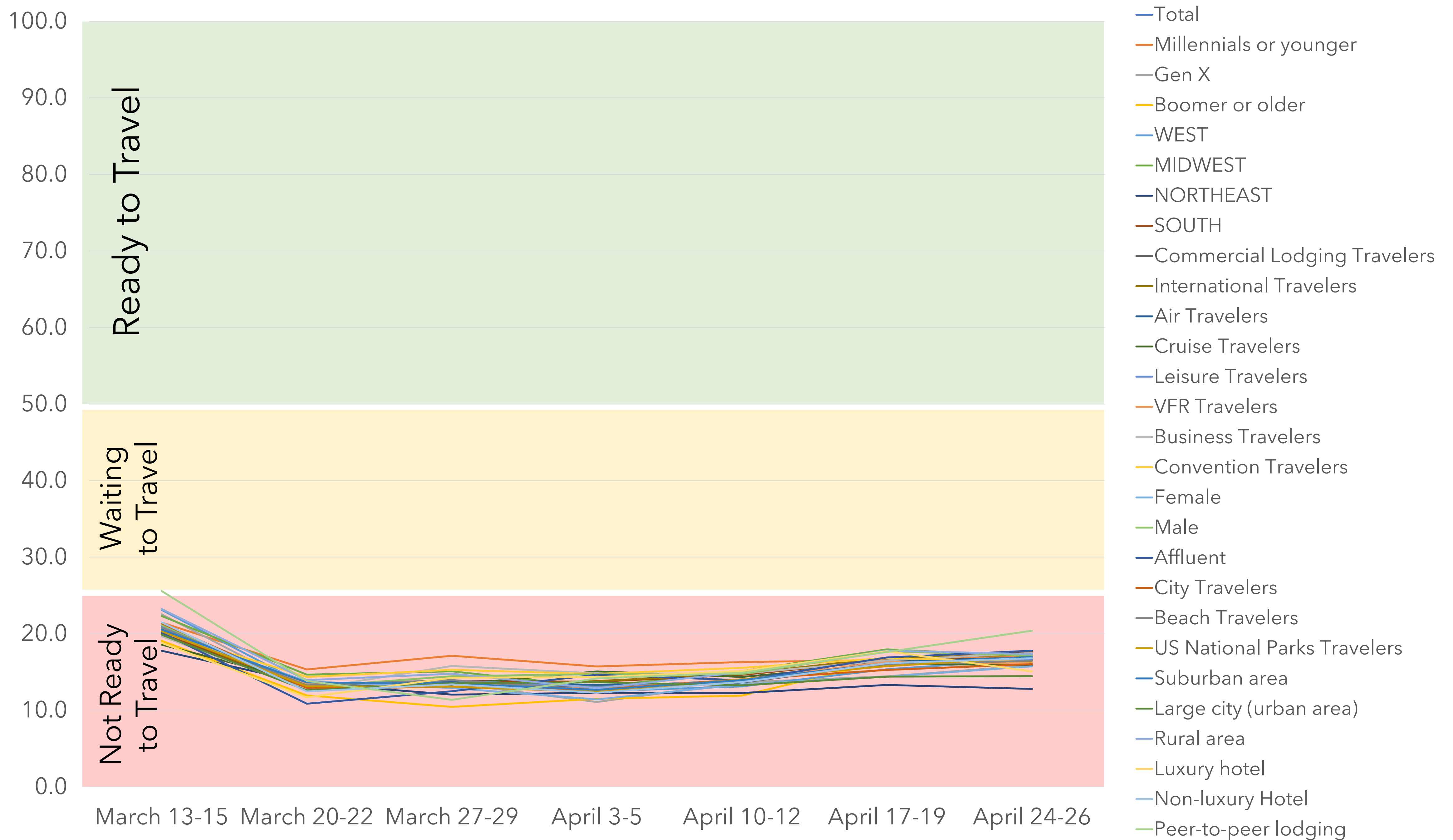
Predictive Index Formula



*Normalized to a 100-point scale



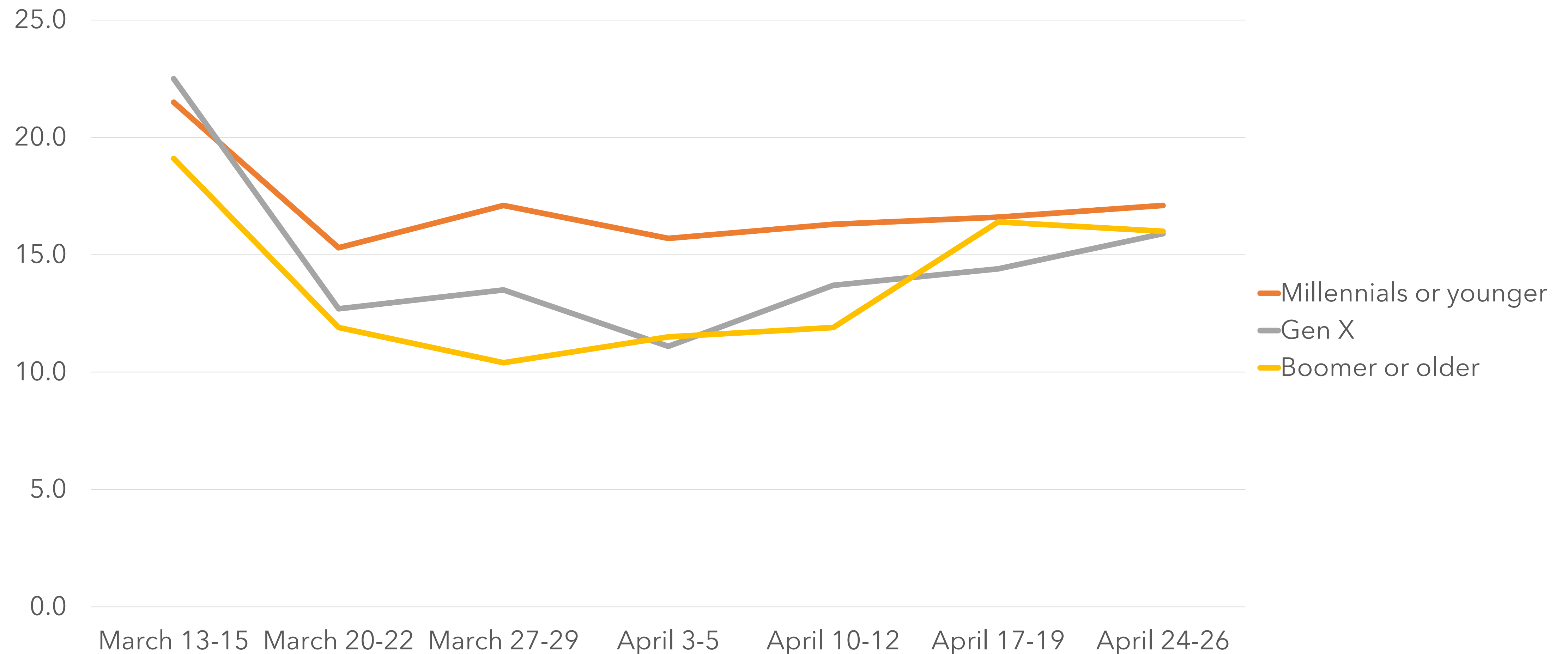




Generation

Points of Interest Impacting Index Scores:

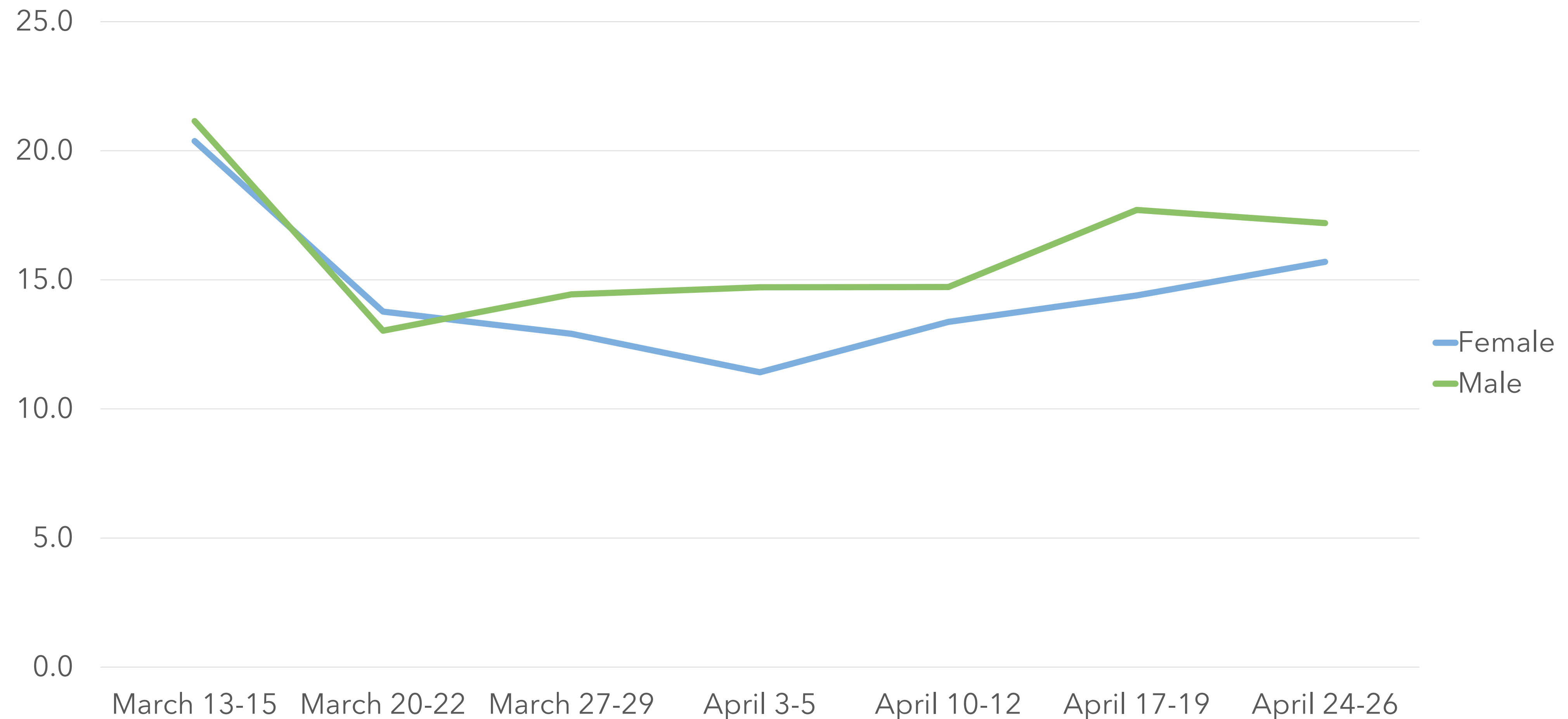
- For the first time in weeks, Gen X is NOT the most concerned personally for contracting the virus. Surprisingly Millennials are highest, Boomers lowest.
- Boomers this week showing rise in levels of concern for the national economy.
- All generations show similar agreement about traveling in Fall 2020, but Millennials show slightly more optimism about Summer travel than older generations.



Gender

Points of Interest Impacting Index Scores:

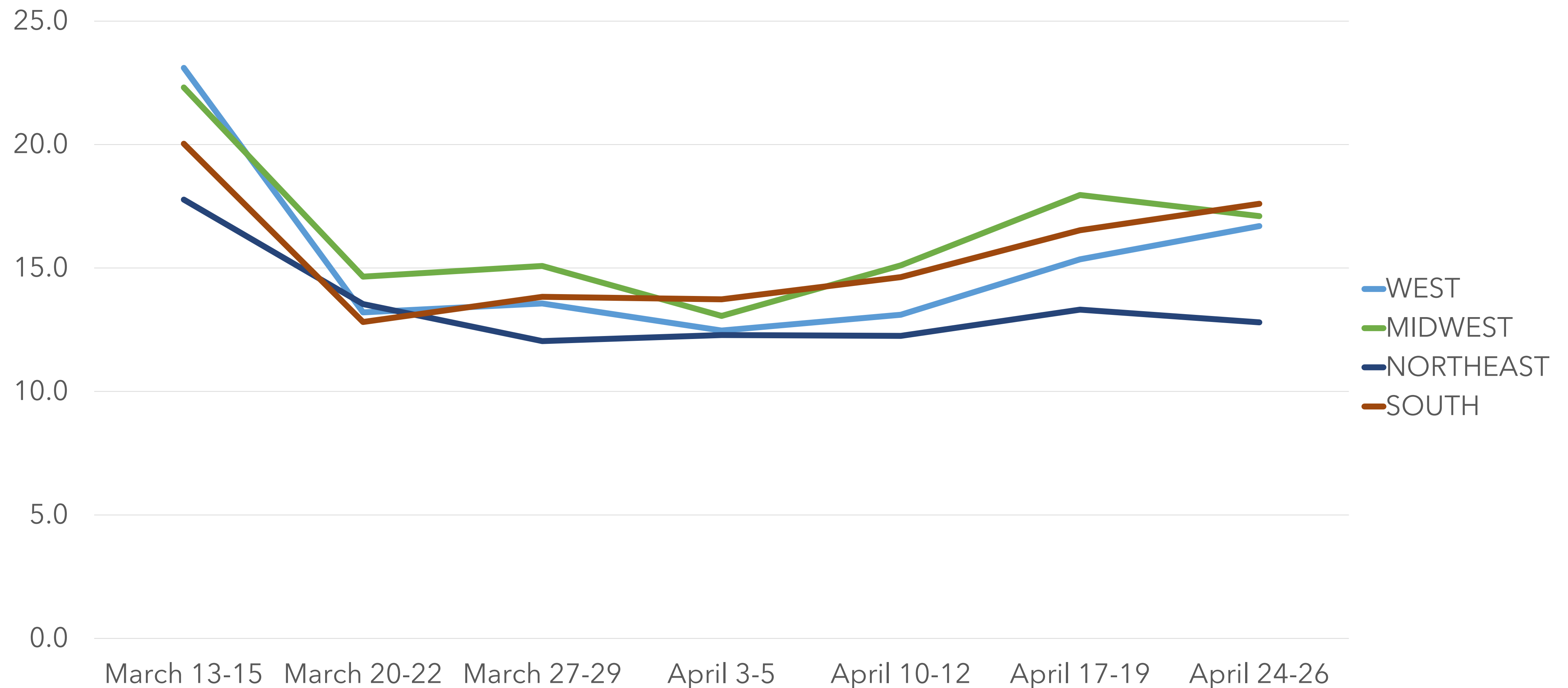
- Men and Women reported similar levels of both safety and financial concerns this week (previously women showing more concern).
- Men, however, continue to show more excitement to travel now and more openness to travel messaging.
- Women more likely to say they will avoid crowded destinations (60.3% vs. 46.6% for men) after COVID-19.



US Region

Points of Interest Impacting Index Scores:

- Northeast reported the highest levels of personal concern for contracting the virus again this week, consistently higher than other regions.
- South showed the most excitement to travel now and the most openness to travel messaging.
- Midwest shifted back to being the least optimistic this week, being the least likely to say the Coronavirus situation will get better or much better in the next month, South is the most optimistic.



To segment the results by a specific group
(generational, geographical, etc.)
Click on "Filters" in the top right corner.



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 week-daily on social media





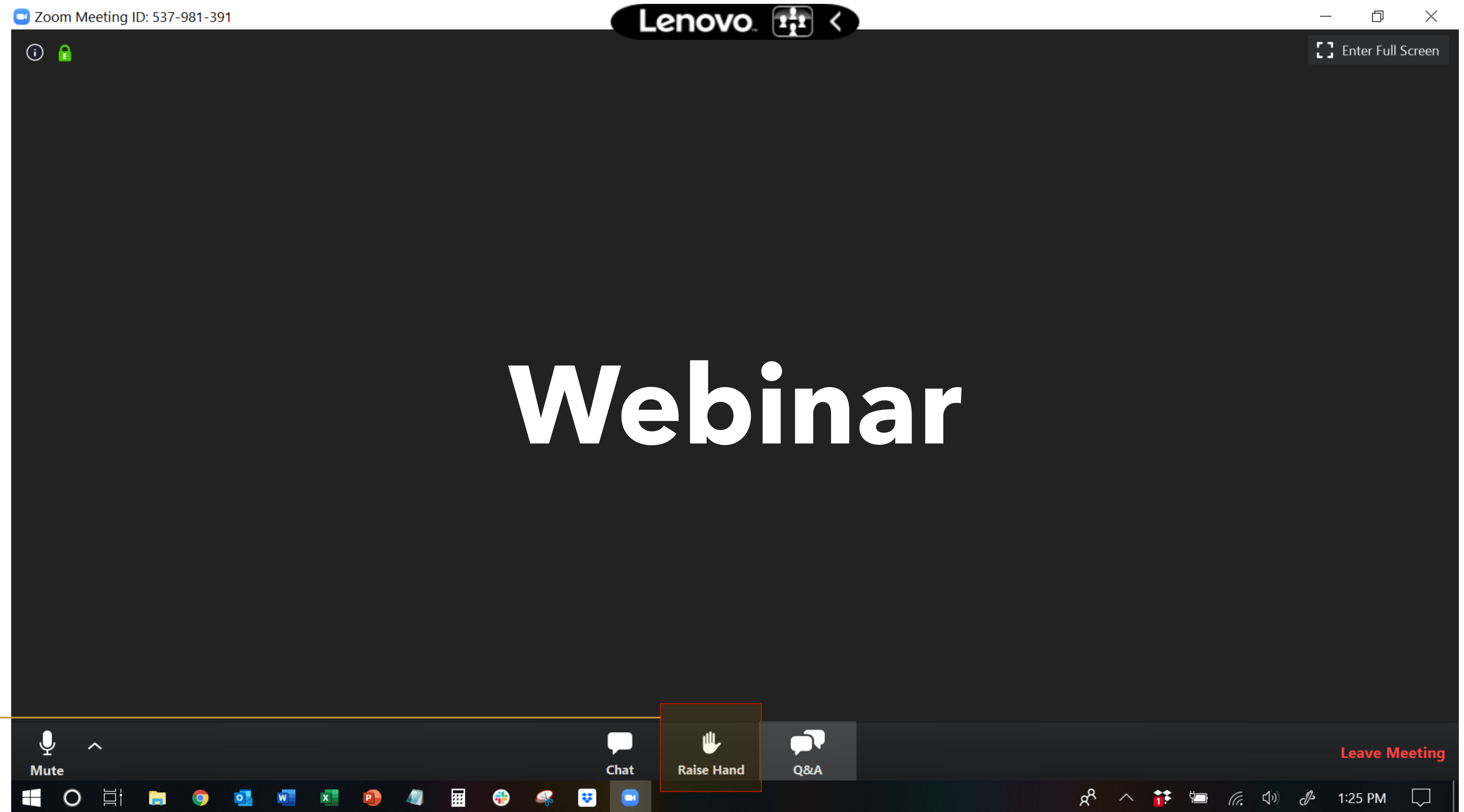
Upcoming for You

- Meeting Planner Sentiment Survey Findings
- More Online Focus Groups with Travelers
- The State of the International Traveler Study Report
- Findings from Study of State Tourism Websites



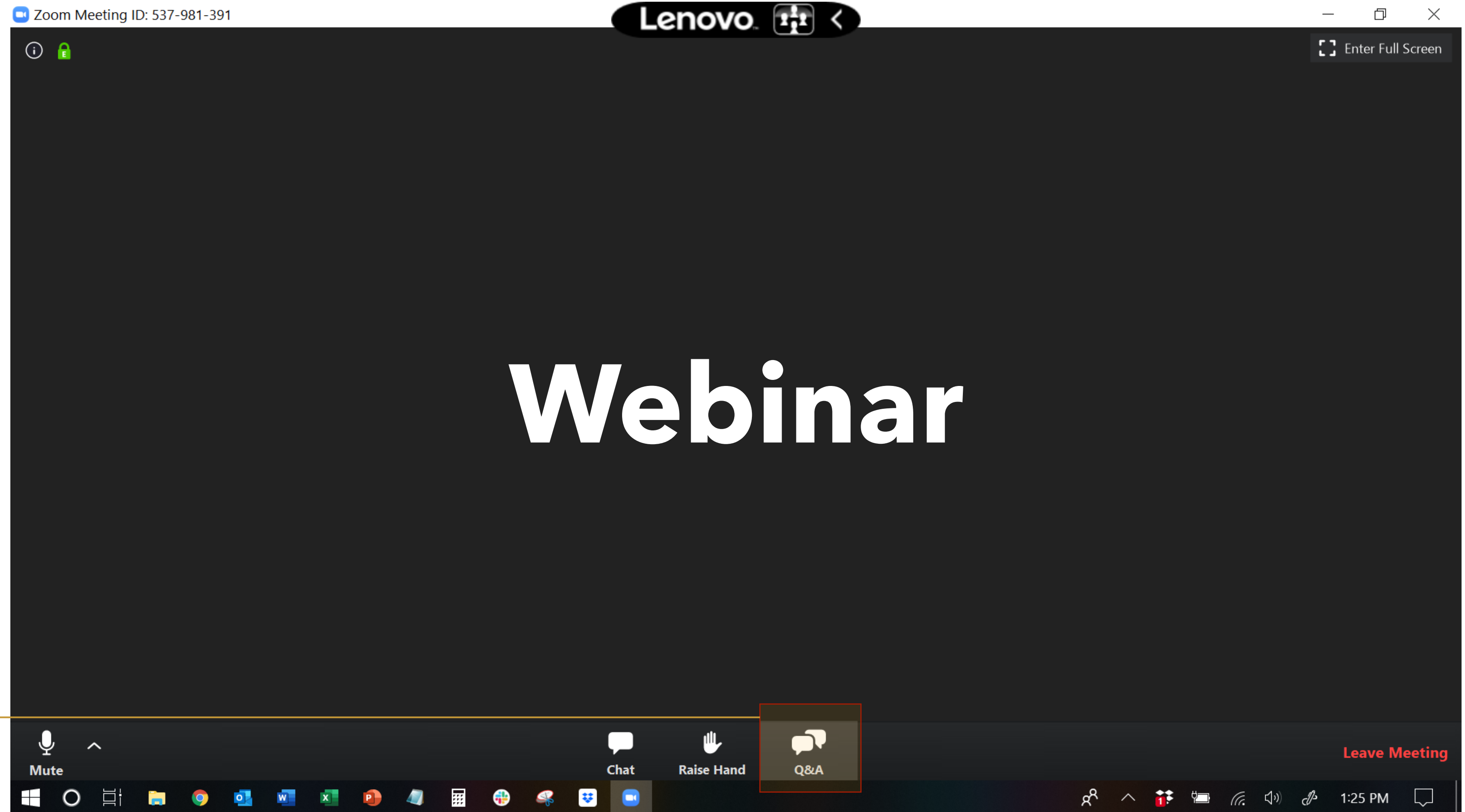
VERBAL QUESTIONS/COMMENTS

At the end of the webinar, you can verbally ask a question or make a comment to the entire audience by clicking the "Raise Hand" feature here.



SUBMITTING WRITTEN QUESTIONS

If you prefer to submit a written question you can do so by clicking "Q&A"



Joining Us



Jackie
National Harbor



Keri
Macy's



Lorenzo
Everlane

Recovery House



Special shopping hours for at-risk customers
Self checkout only
Employee(s) dedicated to monitoring social distancing
Health screenings for customers



Shopping reservations required to limit crowding
Hourly cleaning procedures
Temperature checks for customers
Daily temperature checks for employees

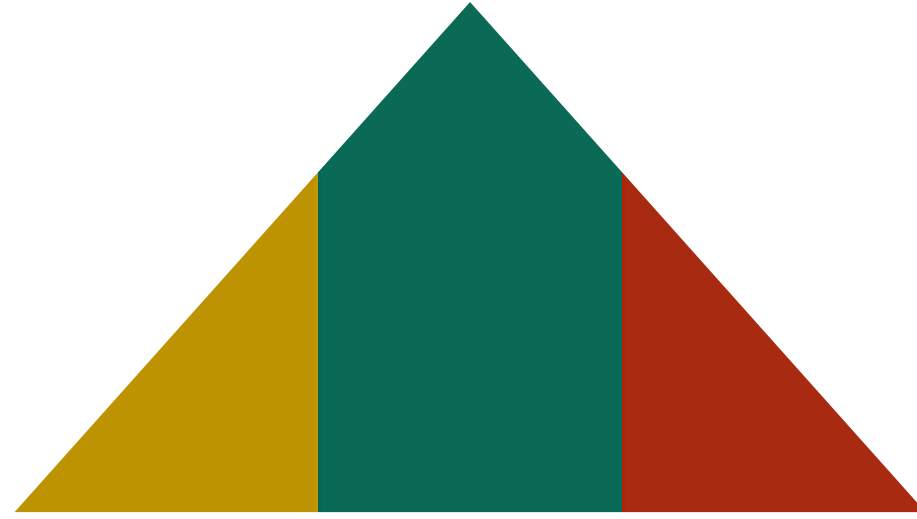


Required masks and gloves for customers
Daily inspections by COVID inspectors
Required sneeze guards at checkout
Required masks and gloves for employees



Required social distancing of 6 feet apart
Weekly health screenings for employees
Aisles/sections at least 6 feet apart
Cashless transactions only

Quarantine House



House 1

Gucci face mask
Urban Outfitters hand sanitizer
Polo Ralph Lauren disinfectant spray
Ray-Ban goggles



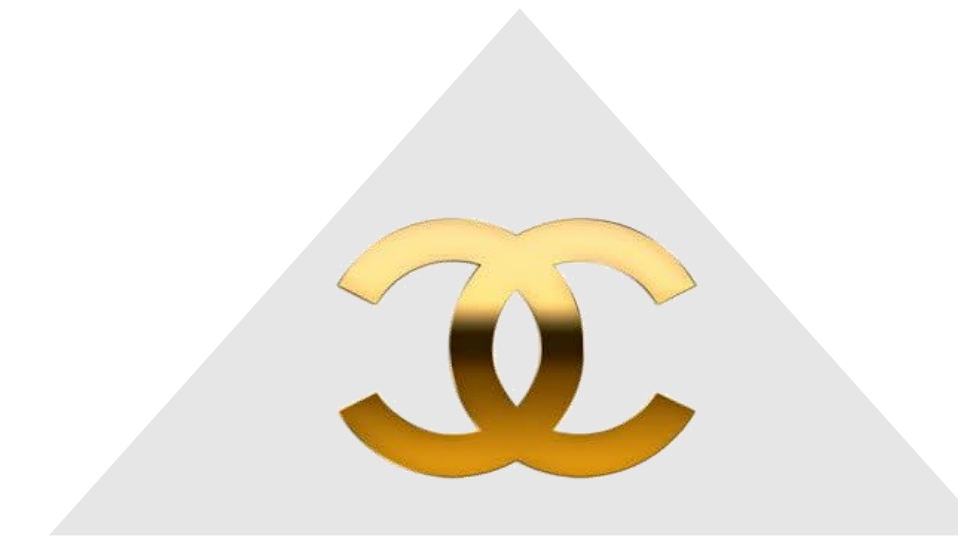
House 3

Burberry latex gloves
Patagonia sneeze guard
Abercrombie & Fitch hand sanitizer
Old Navy disinfectant wipes



House 2

Louis Vuitton sneeze guard
Adidas disinfectant wipes
simplehuman thermometer
Bath & Body Works gentle foaming hand soap



House 4

Chanel goggles
Nike face mask
Bang & Olufsen thermometer
Uniqlo latex gloves

