



Coronavirus Travel Sentiment Index

Presentation of Findings
Week of May 4th

Destination  Analysts

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.

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



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

Research Q + A

Panel Discussion:
Hotels & the Next Normal

Q + A with Panel





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 8 data (fielded May 1-3) 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





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.

REUTERS

U.S. LEGAL NEWS
APRIL 30, 2020 / 03:15 PM / UPDATED MOMENTS AGO

Half of U.S. states easing coronavirus restrictions as jobless numbers grow

By Doina Chiacu and Maria Caspani



USA TODAY

The new normal? Delta, American, United join airlines requiring passengers to wear face masks

CURTIS TATE | USA TODAY
Updated 7:10 pm EDT Apr. 30, 2020

As travelers begin to return to the country's airports, they'll notice the changes meant to prevent the spread of the coronavirus.

10:25
Mail

The coronavirus pandemic may have slowed down in many parts of the country because of social distancing efforts but don't plan your parties, vacations or trips to the office just yet. Experts say the virus won't be a thing of the past any time soon.

npr

Fauci Says It's 'Doable' To Have Millions Of Doses Of COVID-19 Vaccine By January

BRACKTON BOOKER - APRIL 30, 2020



Top Stories



CNN

More than half of the country goes into first weekend with loosened coronavirus restrictions

wearing face masks will be customary, and even required by most domestic airlines. More airports may use machines to check passengers for fever. Security checkpoints may have plexiglass shields between passengers and screeners.



THE HILL

HILL.TV

← TRANSPORTATION

May 03, 2020 - 11:46 AM EDT

Southwest Airlines CEO says it is safe to travel again

BY REBECCA KLAR 1,504 SHARES

A second round of Covid-19 cases is "inevitable" come fall, the nation's top health official, as some states begin to ease or lift

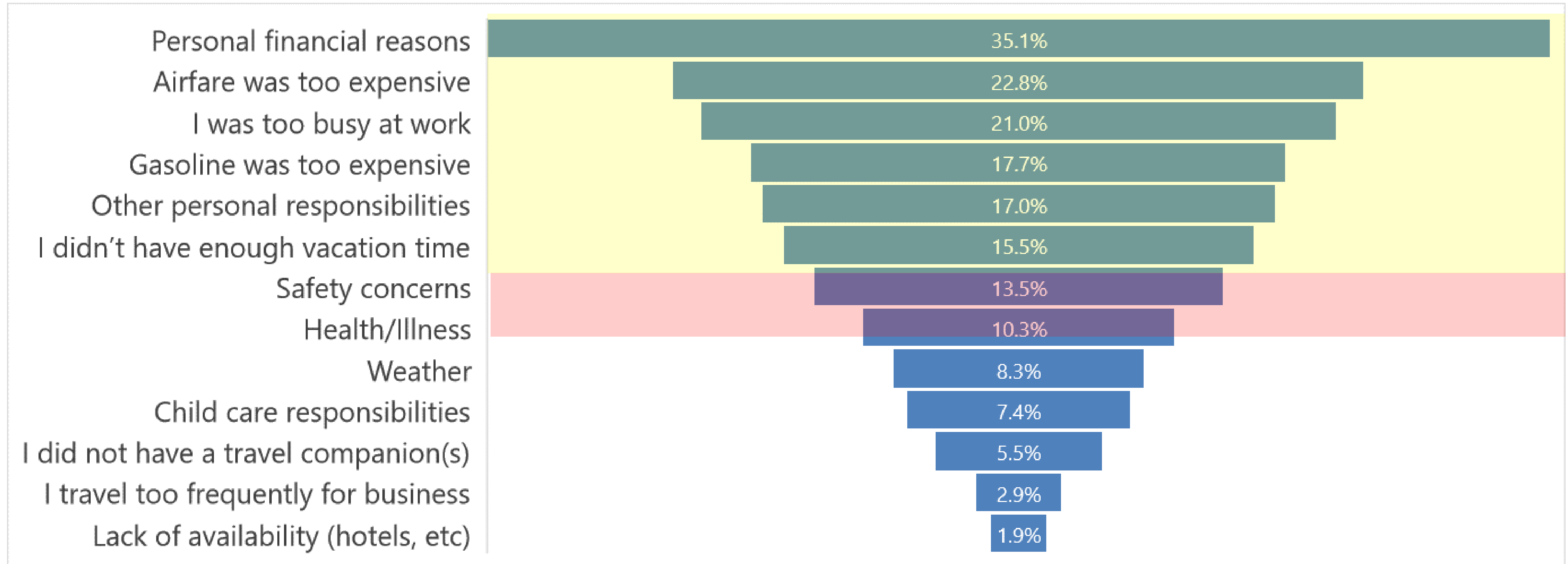
Dr. Anthony Fauci, director of the National Institute of Allergy and Infectious Diseases, speaks during a news conference at the White House on April 16. (Chris Kleponis/Polaris/Bloomberg via Getty Images)

There's a chance that hundreds of millions of doses of a potential COVID-19 vaccine could be available by early next year, Dr. Anthony Fauci, a key member of the White House coronavirus task force, said Thursday, even though the federal government has not approved a vaccine against the virus.

Personal Concerns & Perceptions of Safety



Travel Deterrents in the Old Normal



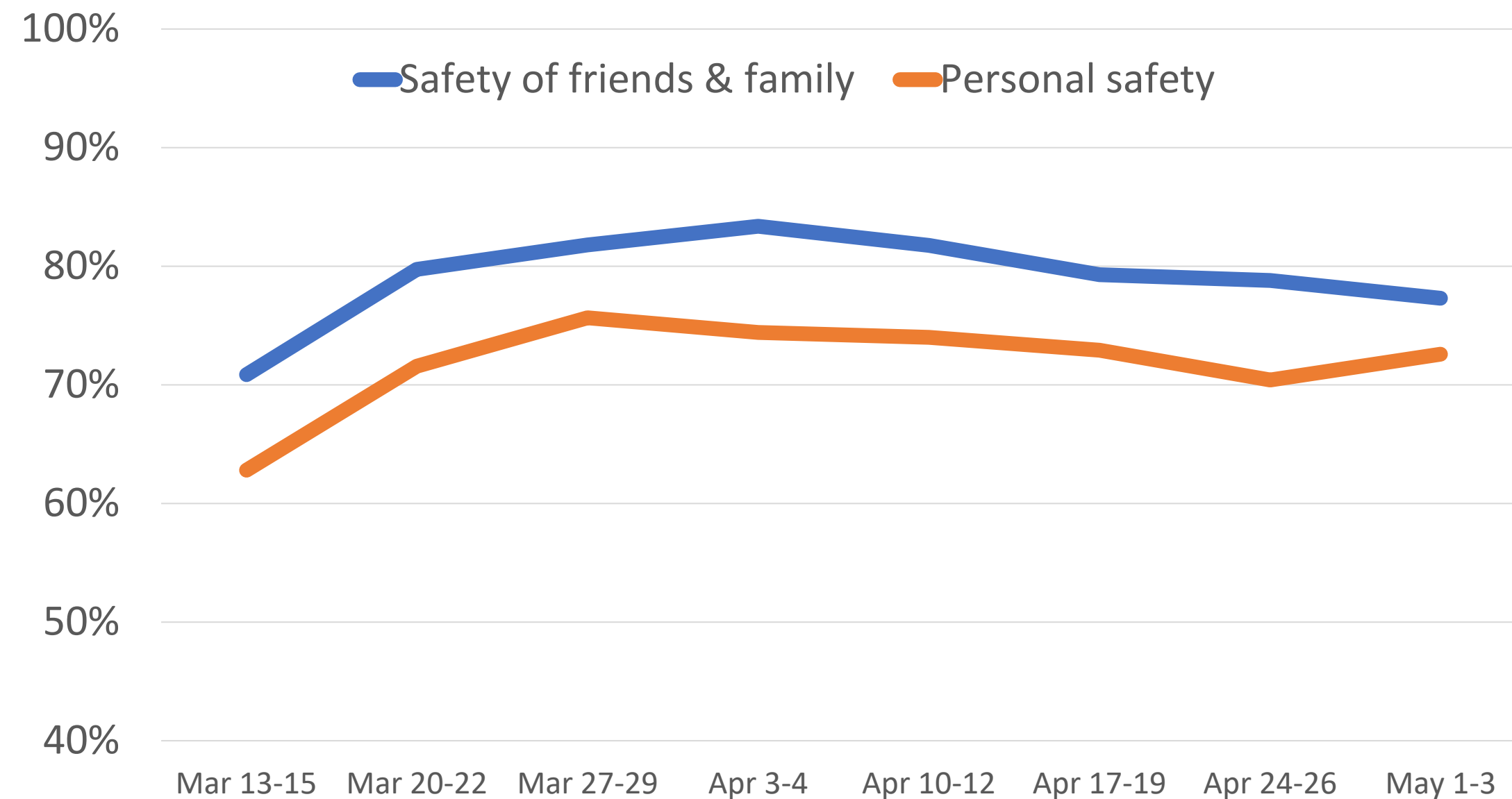
Question: Which of the following (if any) have kept you from traveling as much as you would have liked? (Select all that apply). Base=2,002 Source: The State of the American Traveler—Traveler Segments Edition 2019, Destination Analysts, Inc.

Summary: Personal vs. External Concerns

Summary charts for the survey's four concern-metrics are shown below.

Safety Concerns

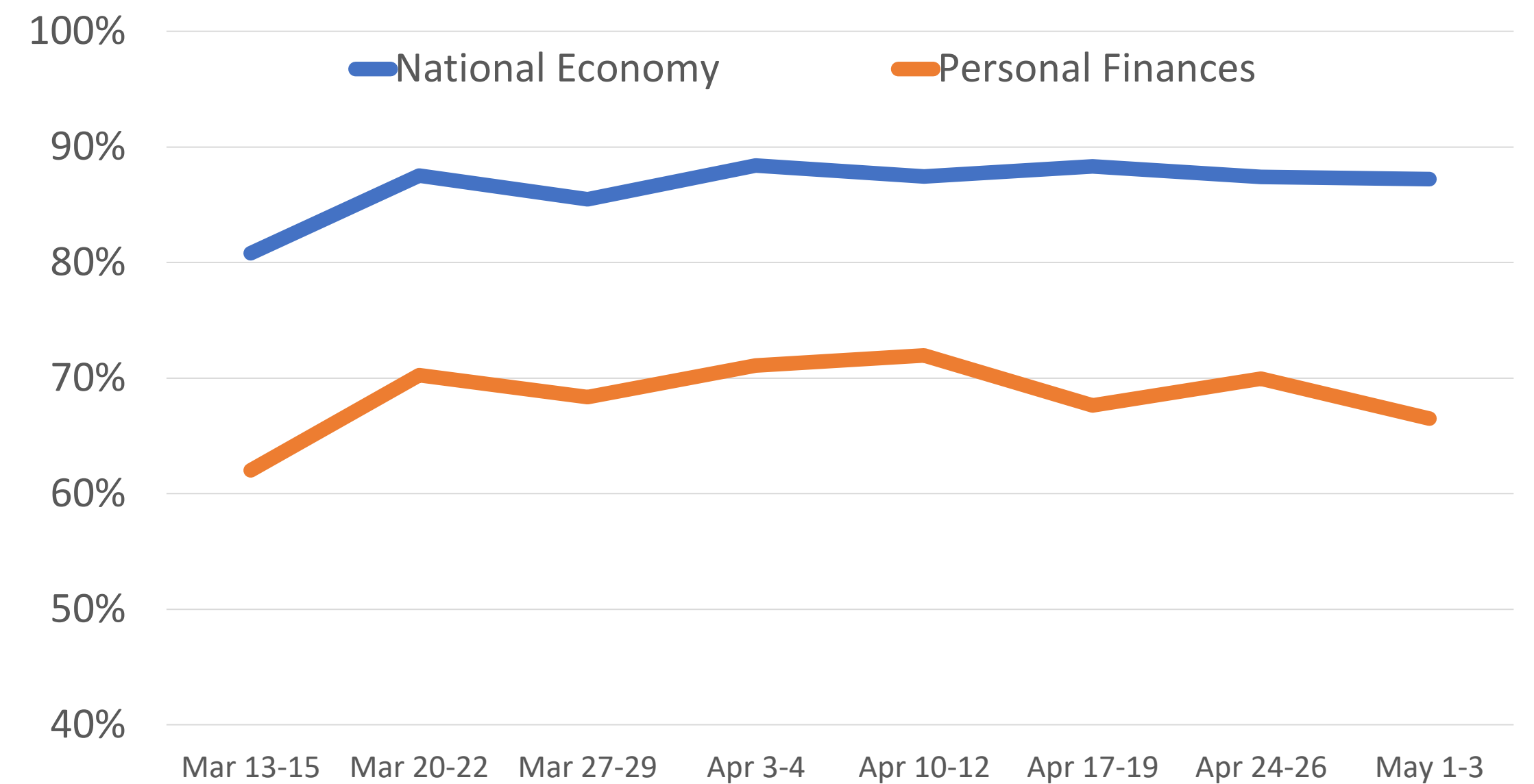
(% answering 10-6 on 11-point scale)



Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? **Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus?

Economic Concerns

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



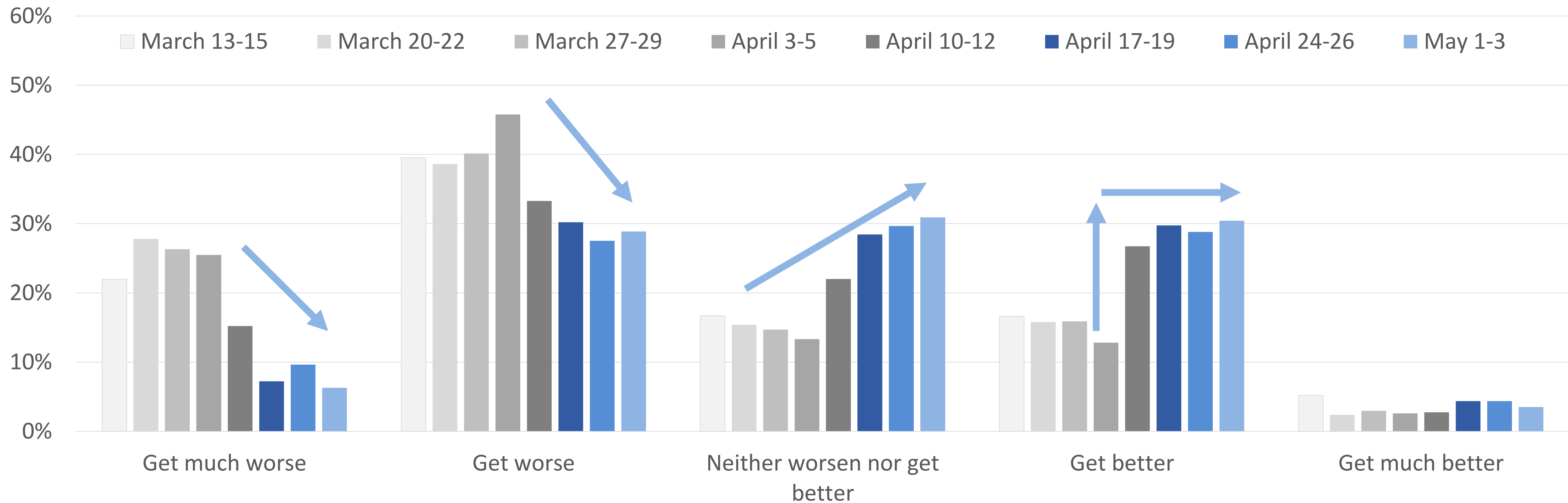
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY? **Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 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 _____



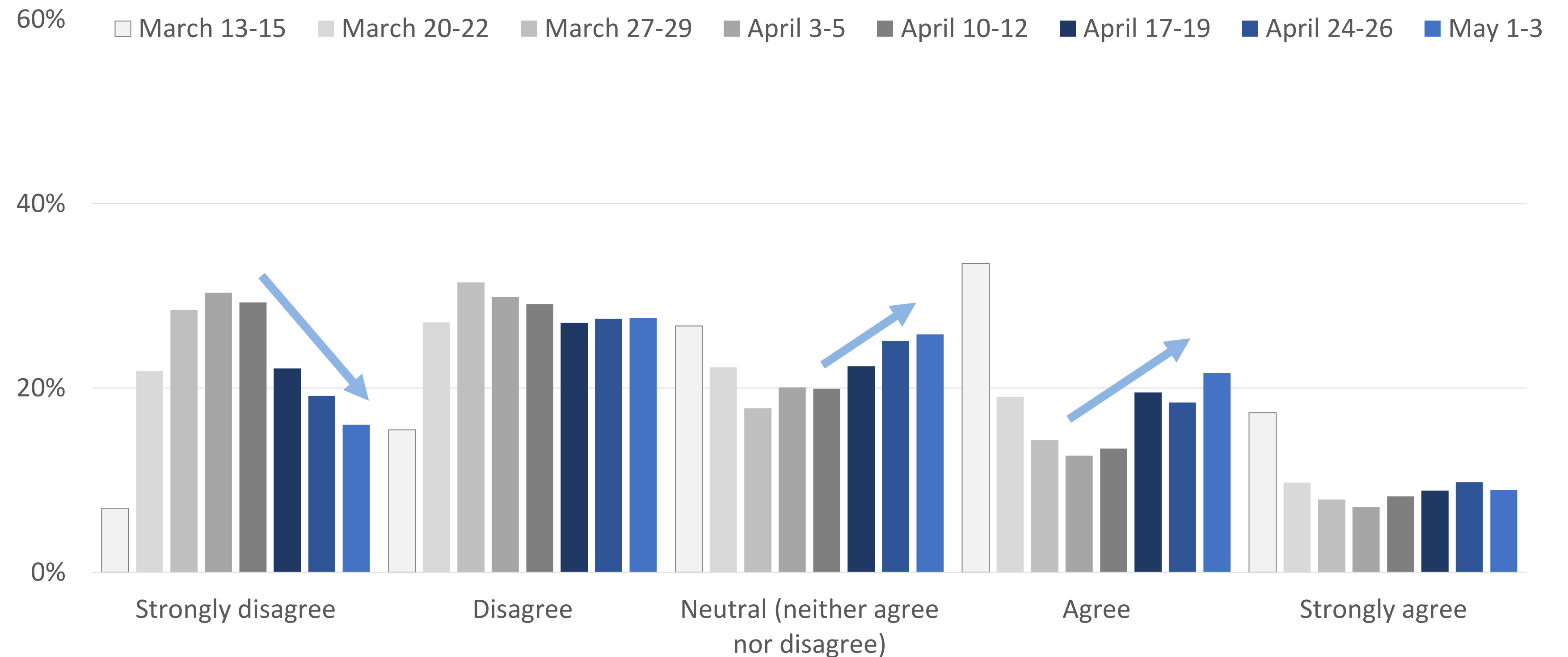
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)

Comfort Enjoying Home Community

How much do you agree with the following statement?

Statement: I feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)

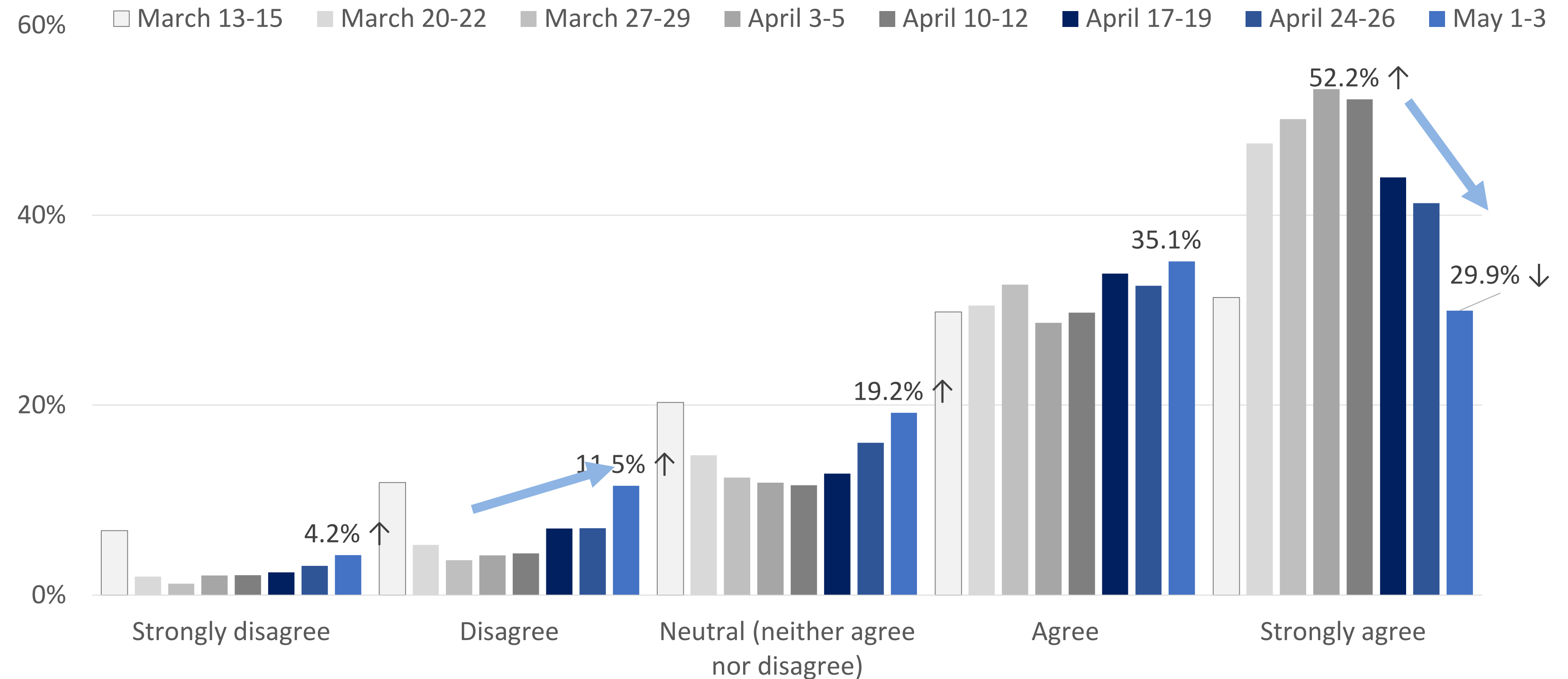


Avoiding Travel Until the Crisis Blows Over

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, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



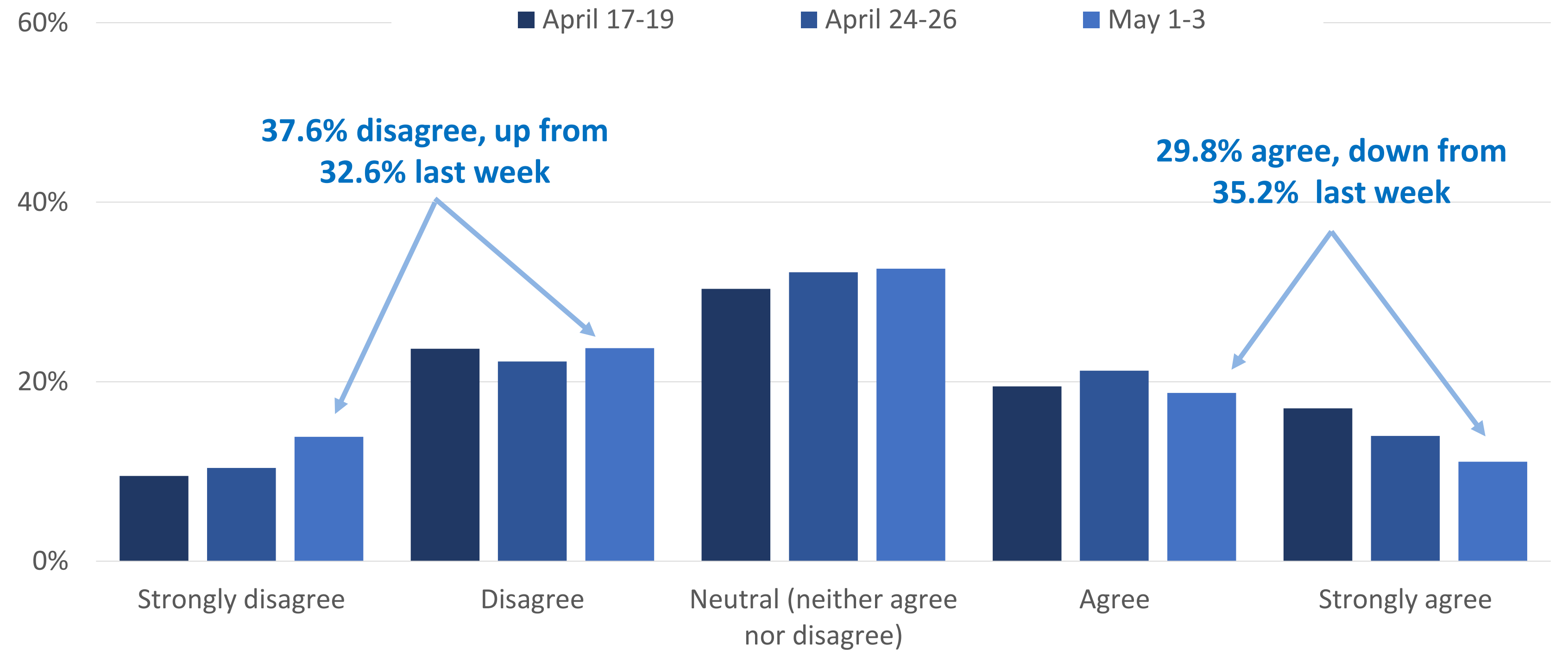
Won't Travel Without Vaccine

How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.

(Base: All respondents, 1,238, 1,208 and 1,204 completed surveys. Data collected April 17-19, 24-26 and May 1-3, 2020)

Question Added in Wave 6

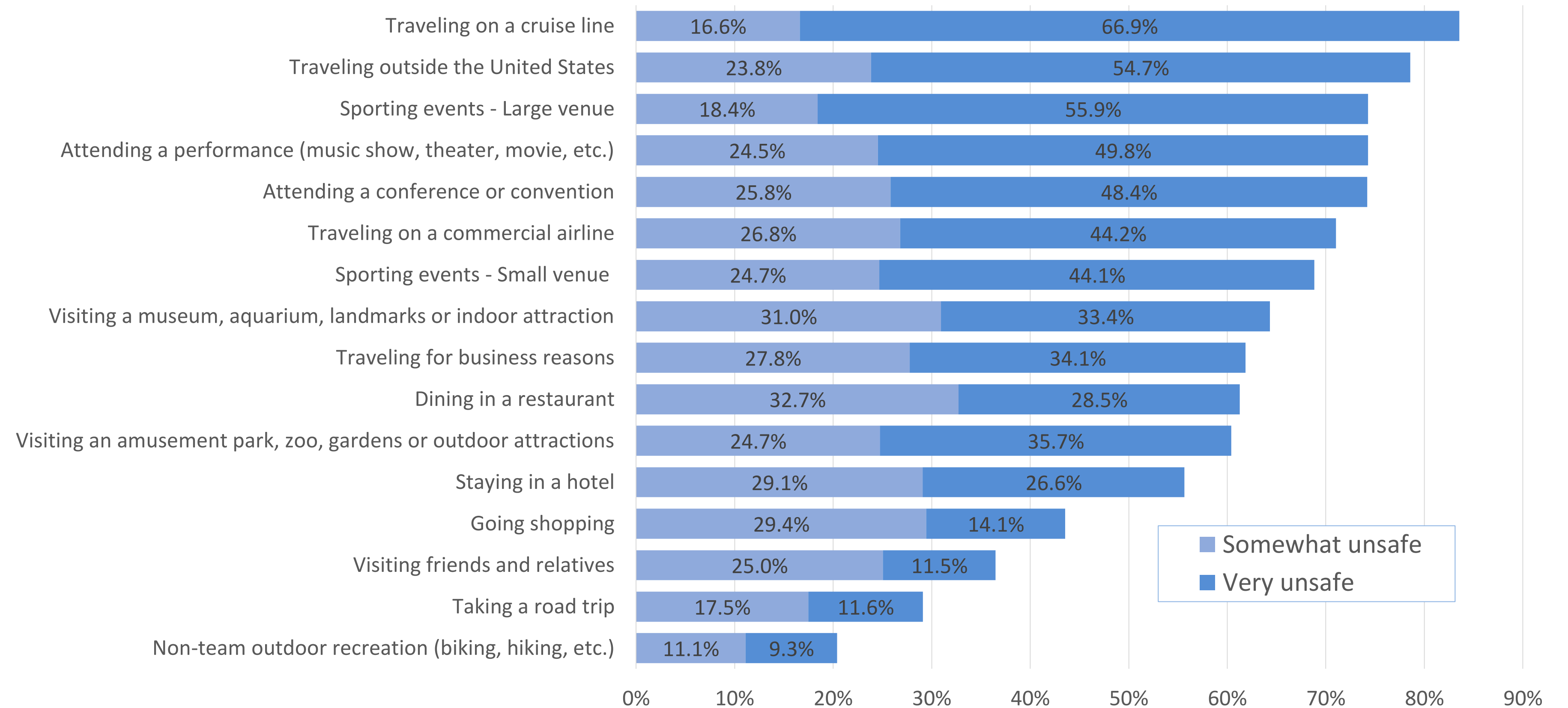


Perceived Safety of Travel Activities (Wave 8)

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

(Base: Wave 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

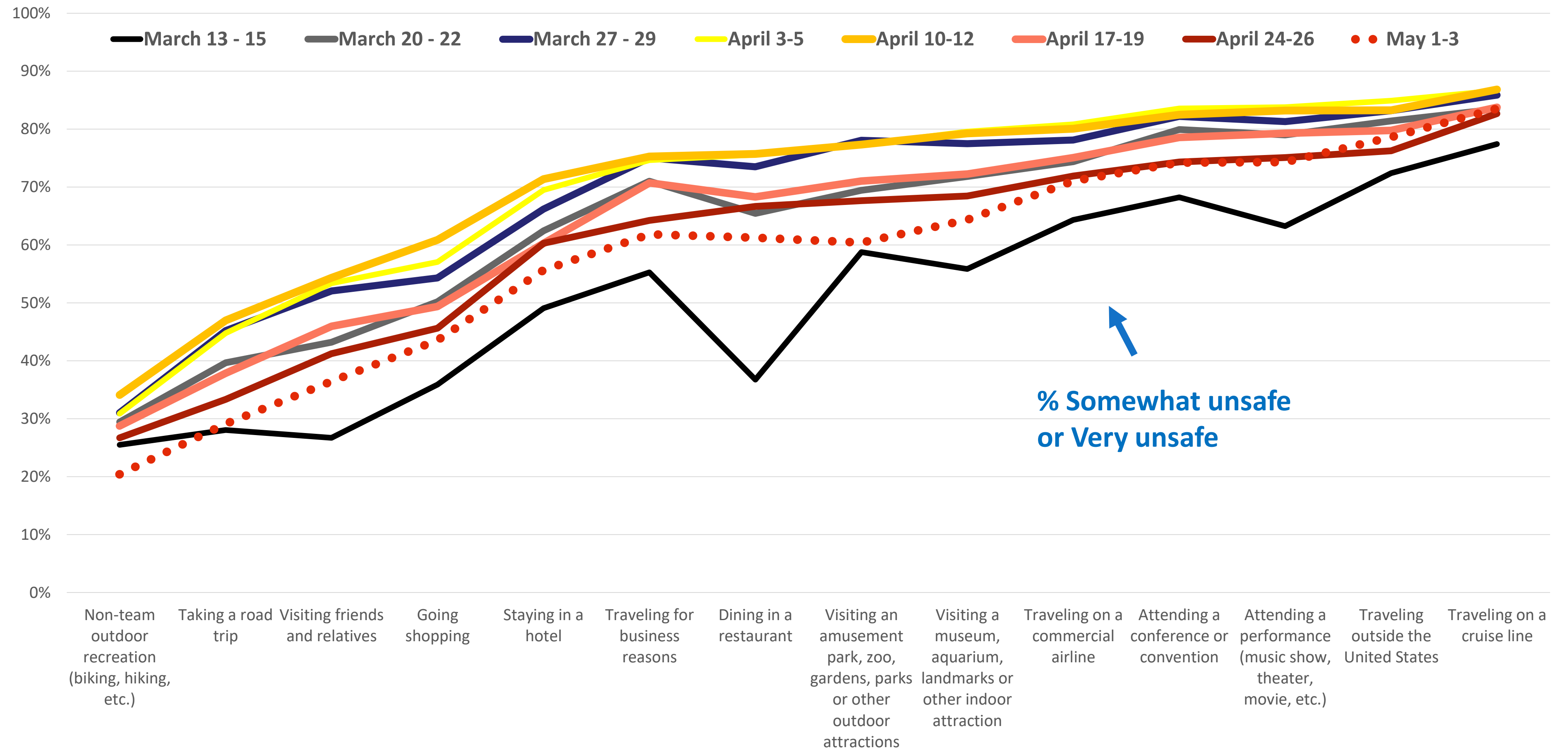
Wave 8 (Collected May 1-3)



Perceived Safety of Travel Activities (Waves 1-8 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, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)

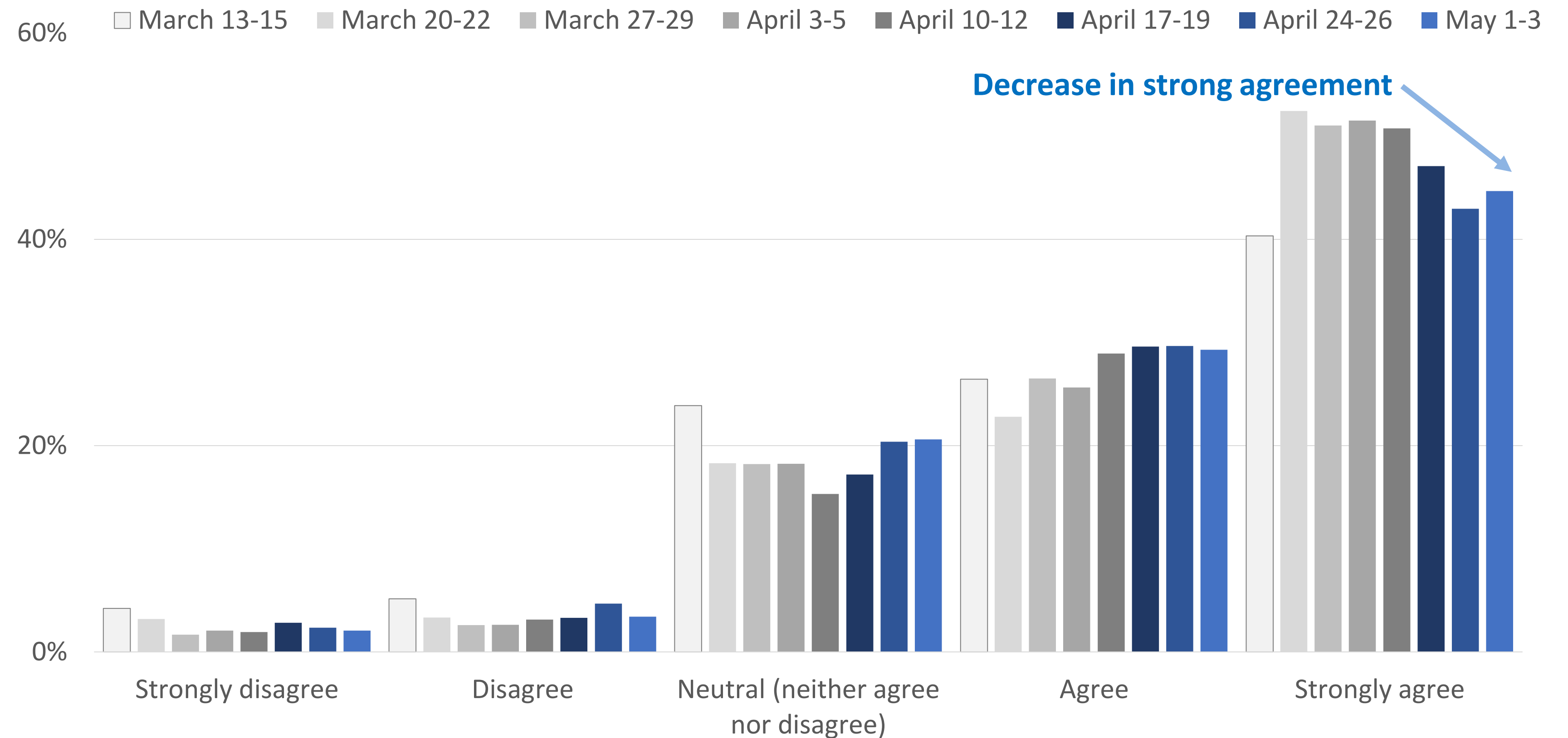


Avoiding Conventions & Conferences

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, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)

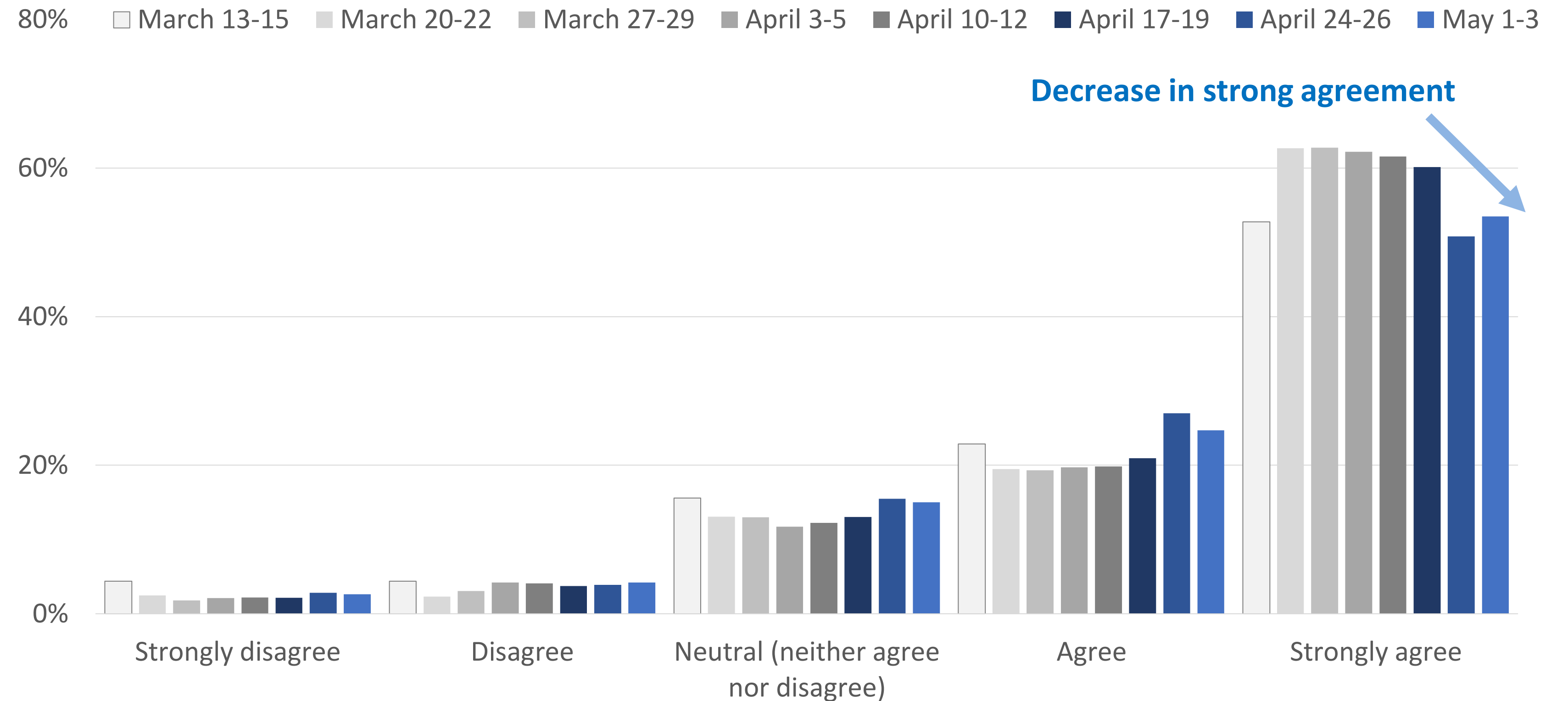


Avoiding International Travel

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.

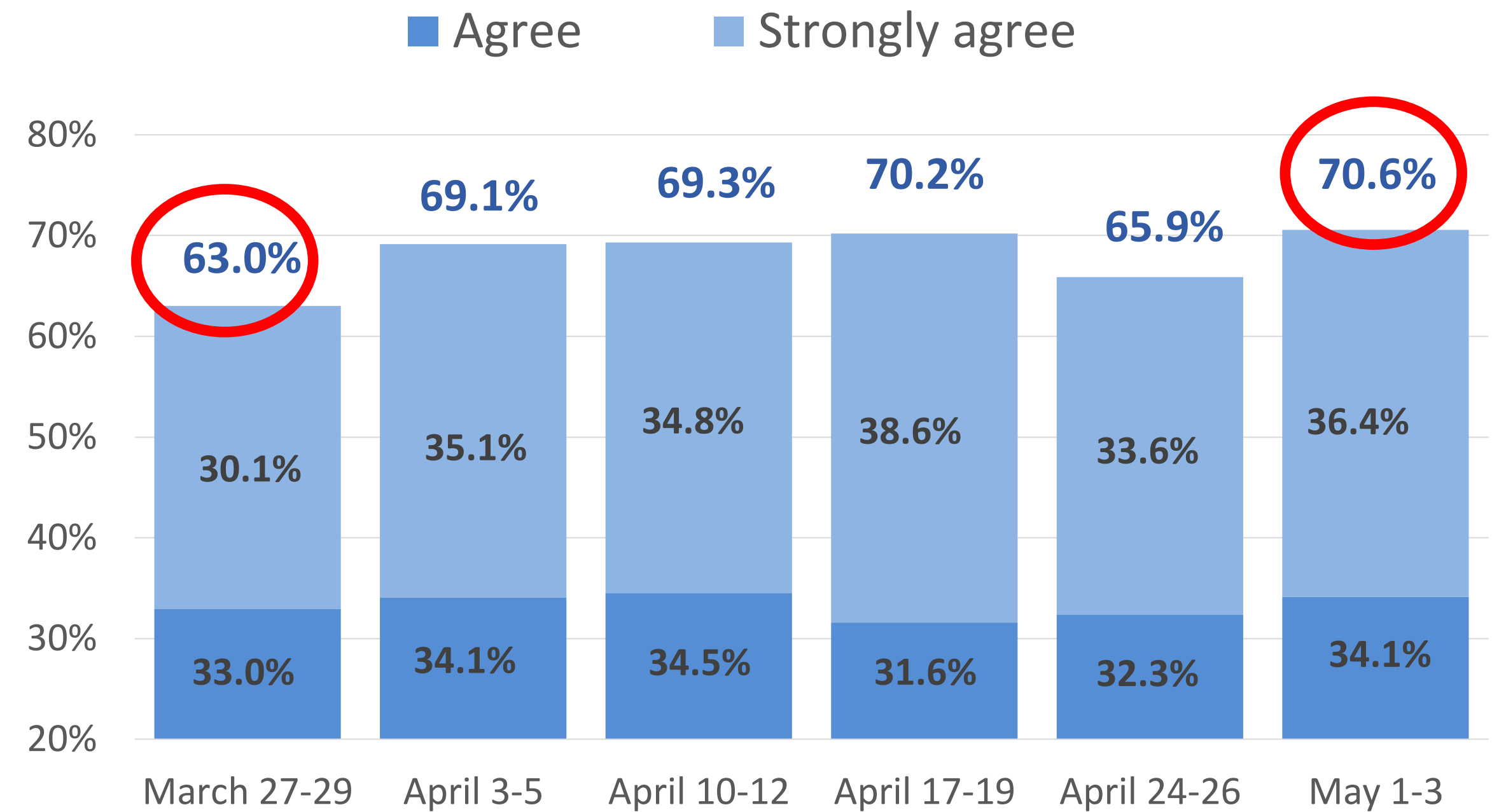
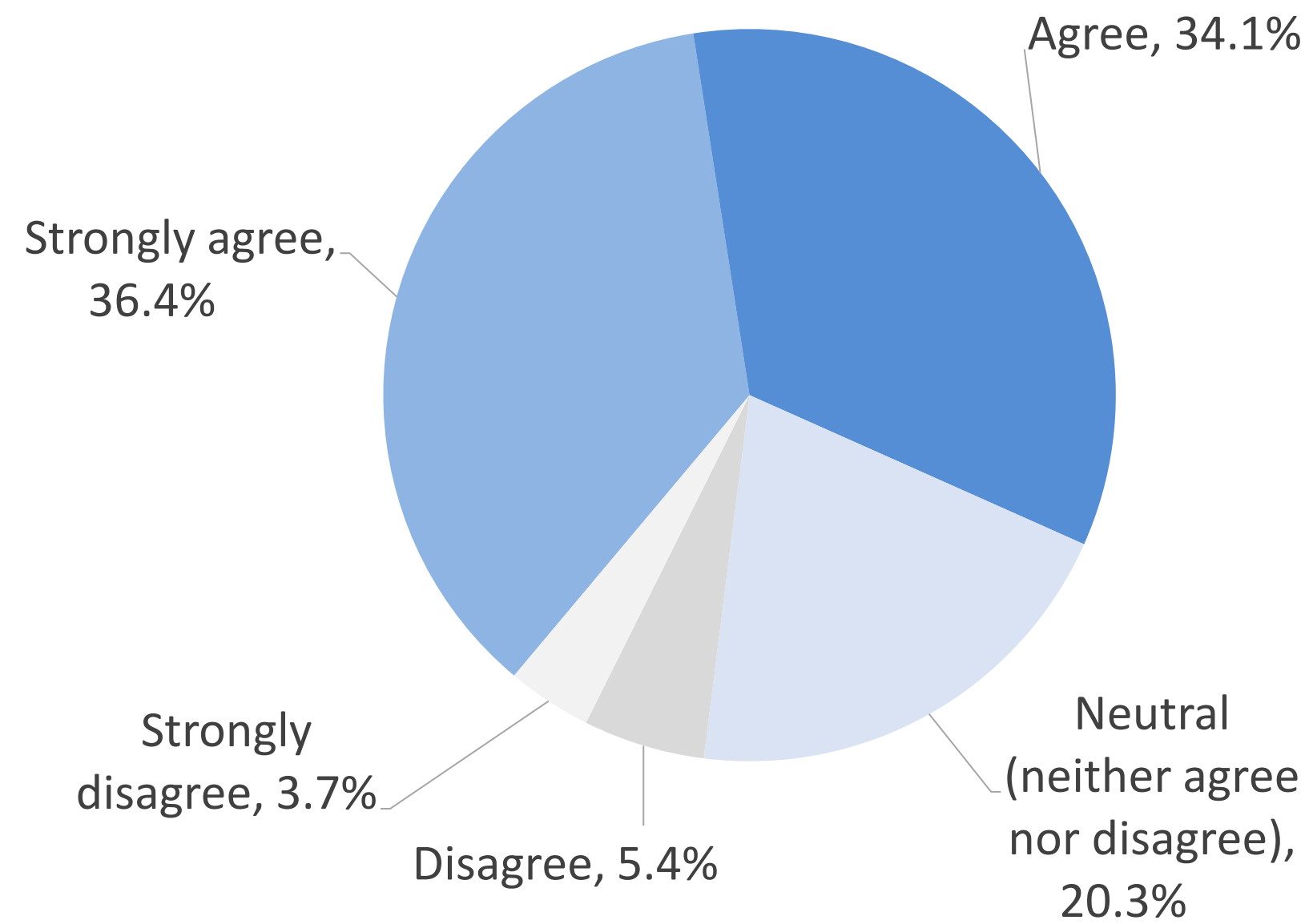
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



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.



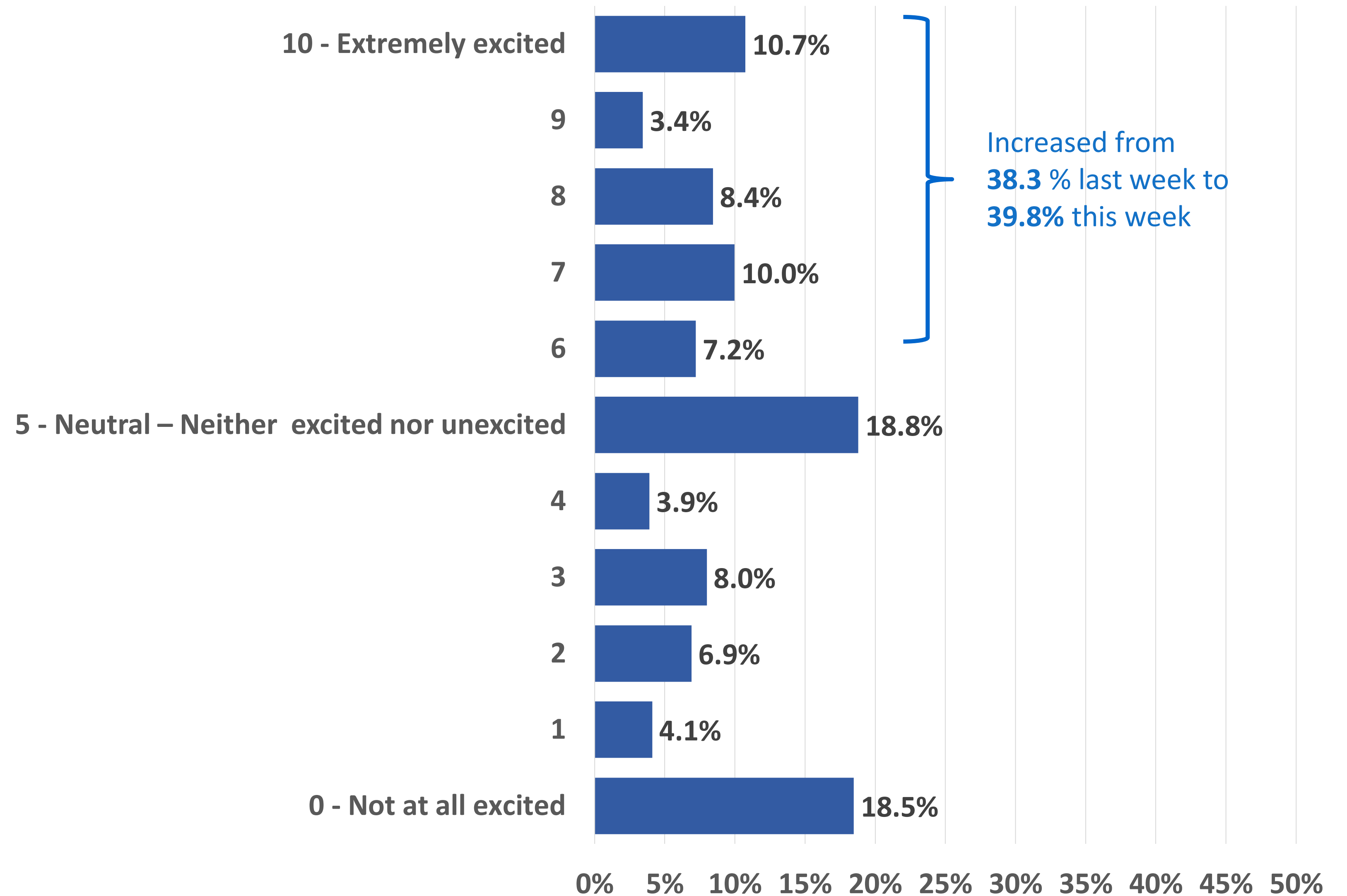
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

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, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)

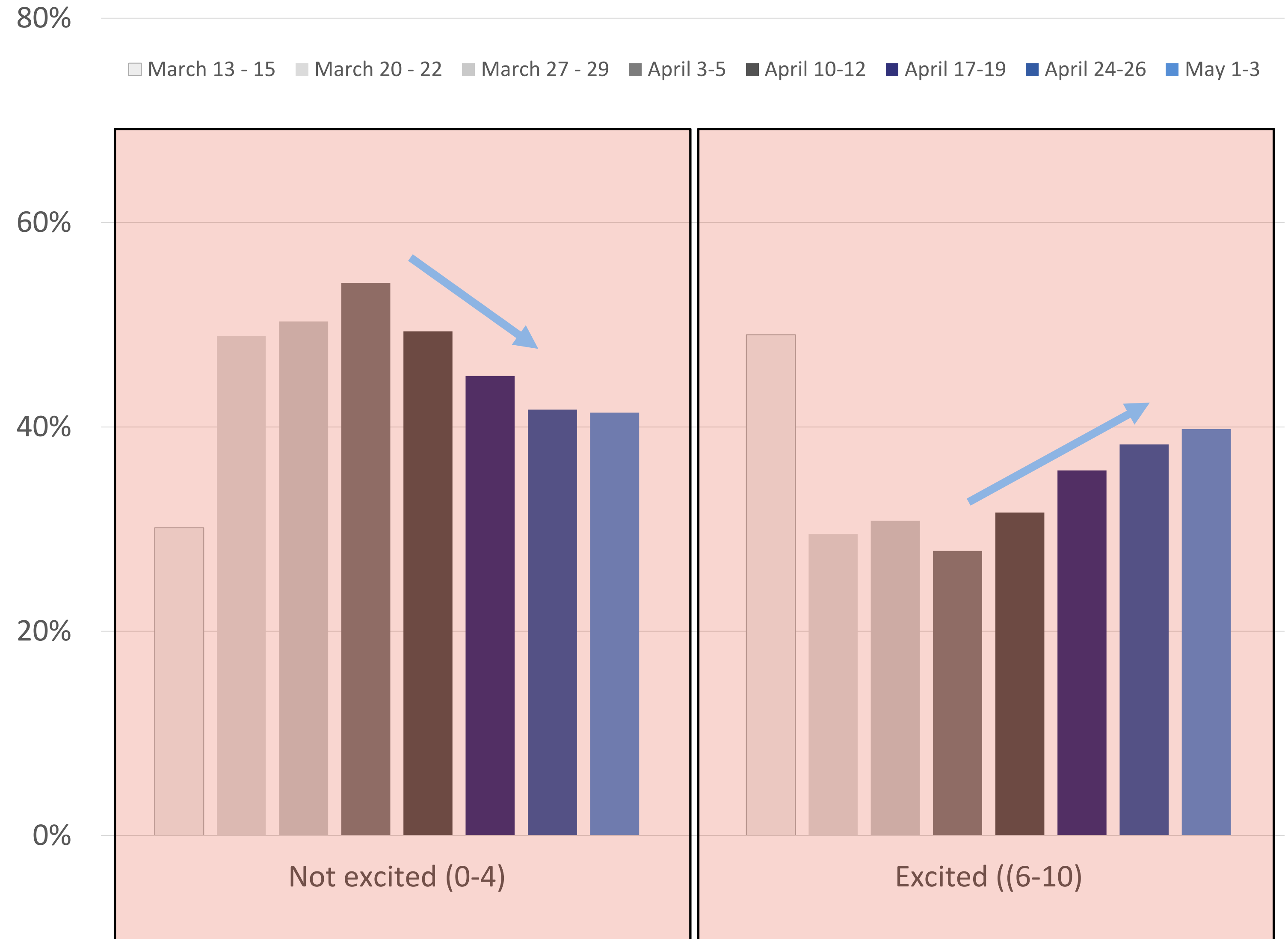


Excitement to Travel Now (Excited vs. Not Excited)

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)

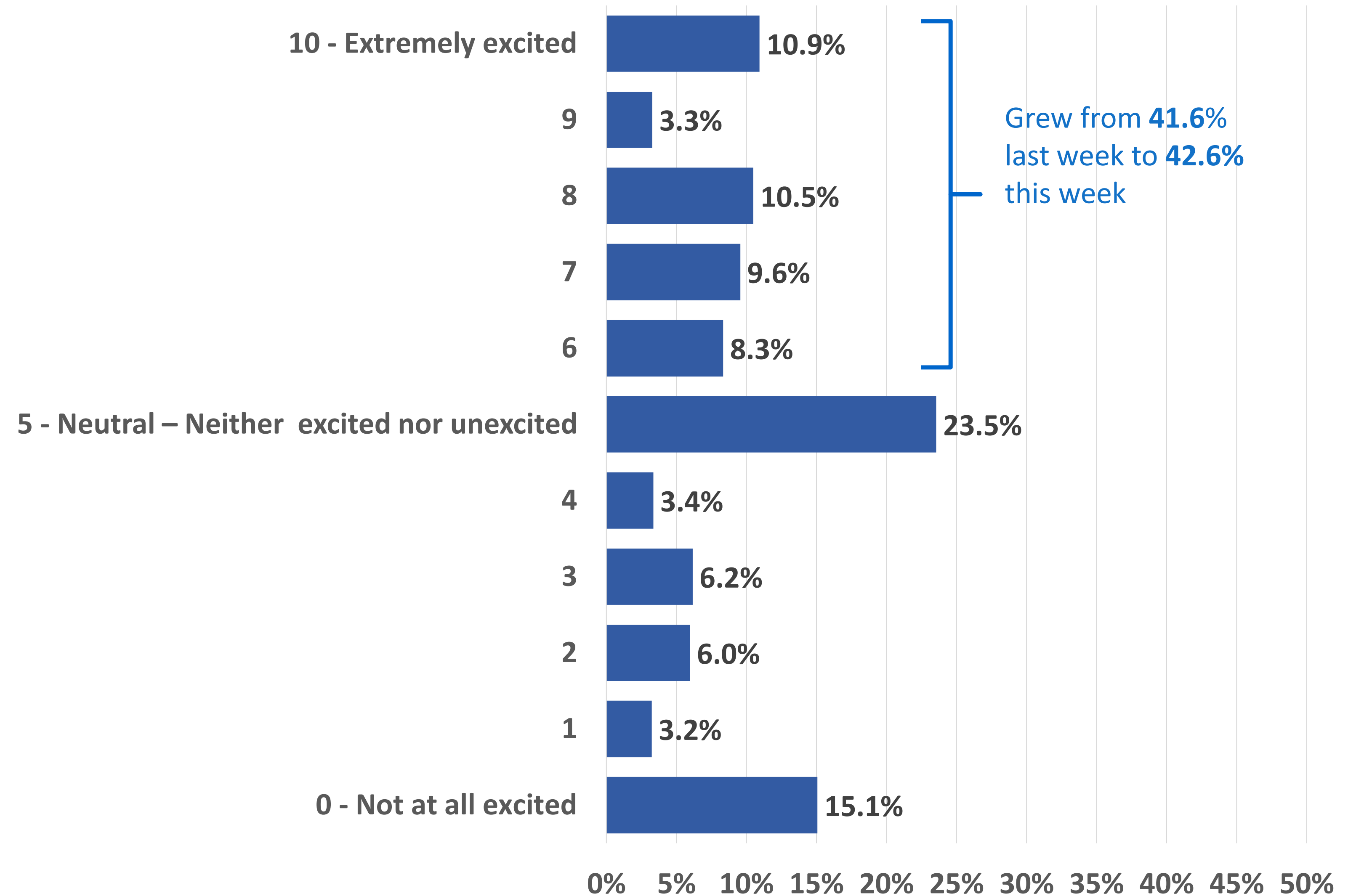
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)



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, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 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?

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KEY TAKEAWAYS

- **Highly-elevated levels of concern for safety and economic factors have softened slightly.**
- **Concern about the safety of specific travel activities has retreated significantly.**
- **Openness to act on excitement for travel is gradually expanding**
- **Don't confuse this softening for a sea-change in traveler sentiment. We remain in a highly abnormal period**
- **Look for when and how these metrics change as we move into a period of economic and social opening**



A man and a woman are sitting in airplane seats, smiling and looking towards the camera. The woman is on the left, wearing a white top and a yellow hooded sweatshirt. The man is on the right, wearing a blue t-shirt. The background shows the interior of an airplane cabin with other passengers and overhead luggage bins.

Are We Ready to Fly Again?

A person in a white protective suit and mask is holding a clipboard with a biohazard symbol and the text 'COVID-19'. The background is a laboratory setting with other people in similar attire. The text 'What Do We Need to Be Ready?' is overlaid on the image.

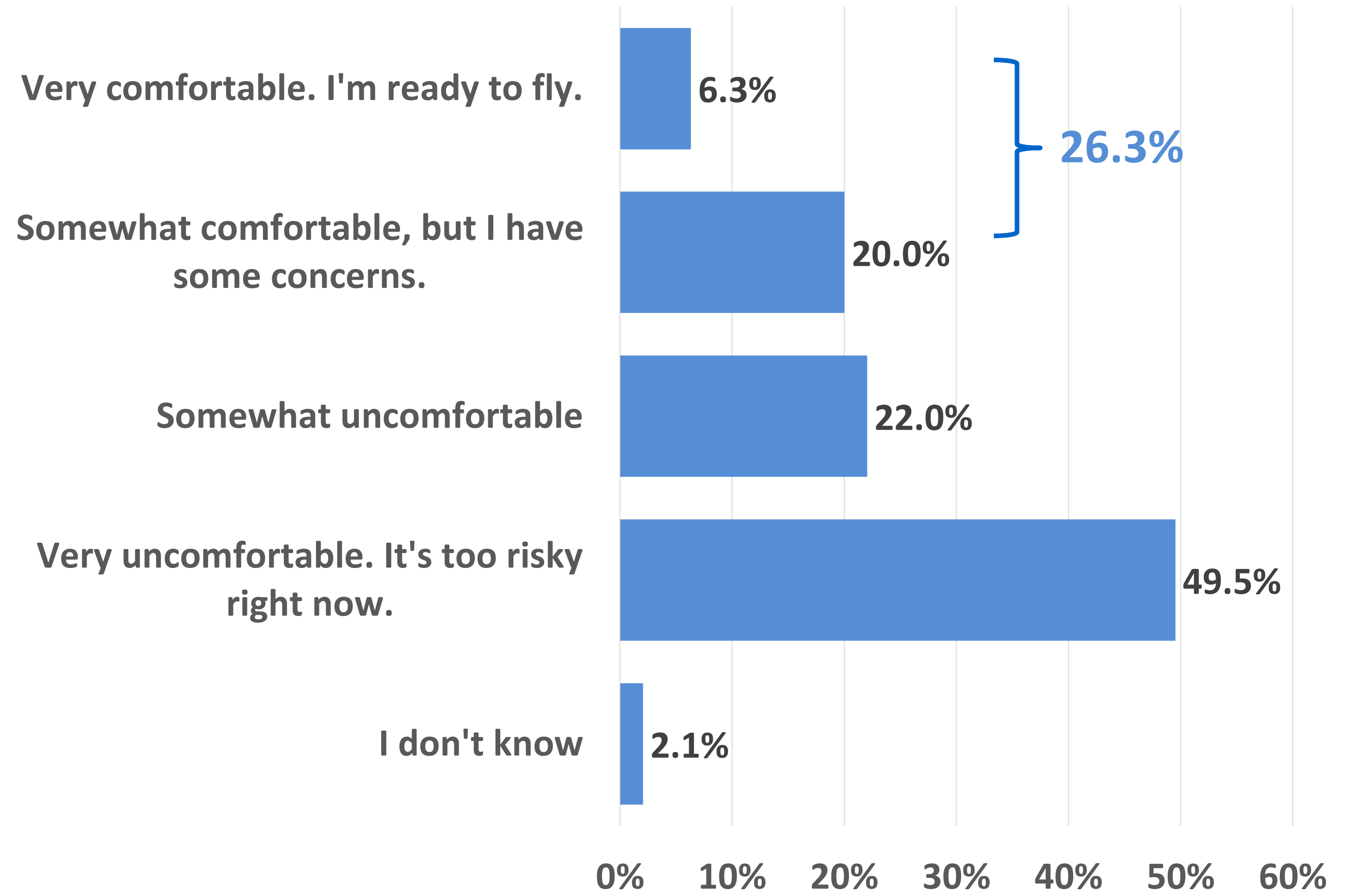
What Do We Need to Be Ready?

Readiness to Fly on Commercial Airlines

Question: Which best describes how you feel right now about traveling on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8

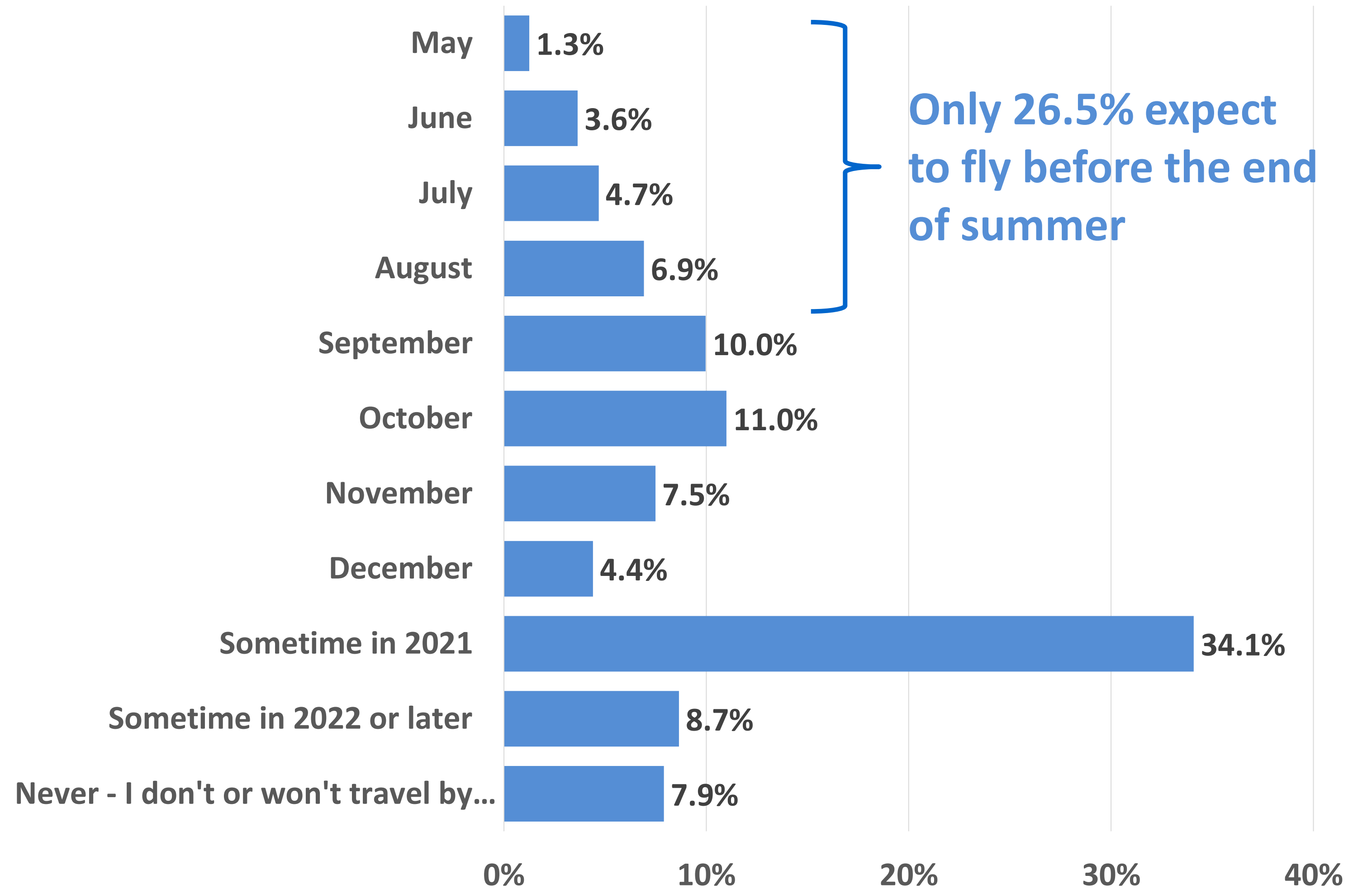


Next Flight on a Commercial Airline

Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8

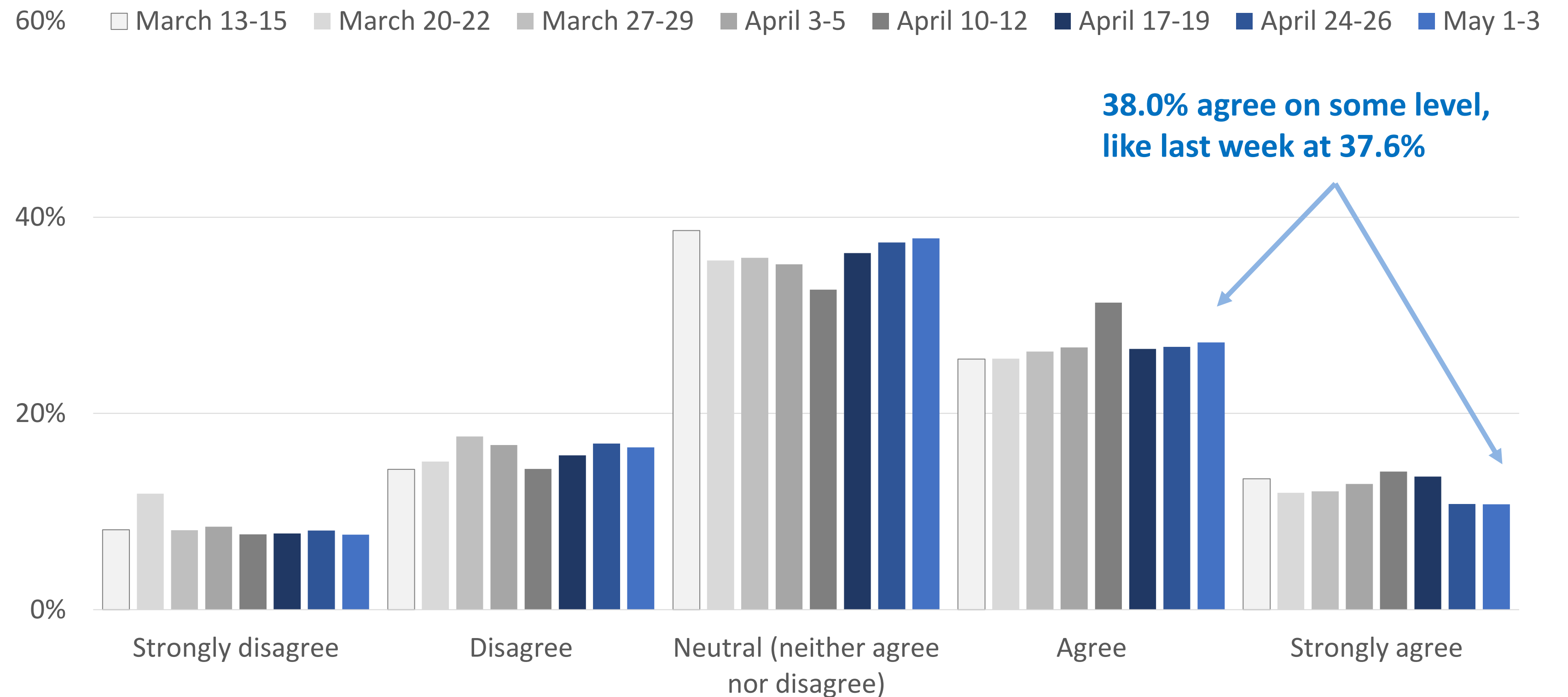


Replacing Air Travel With Road Trips

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, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



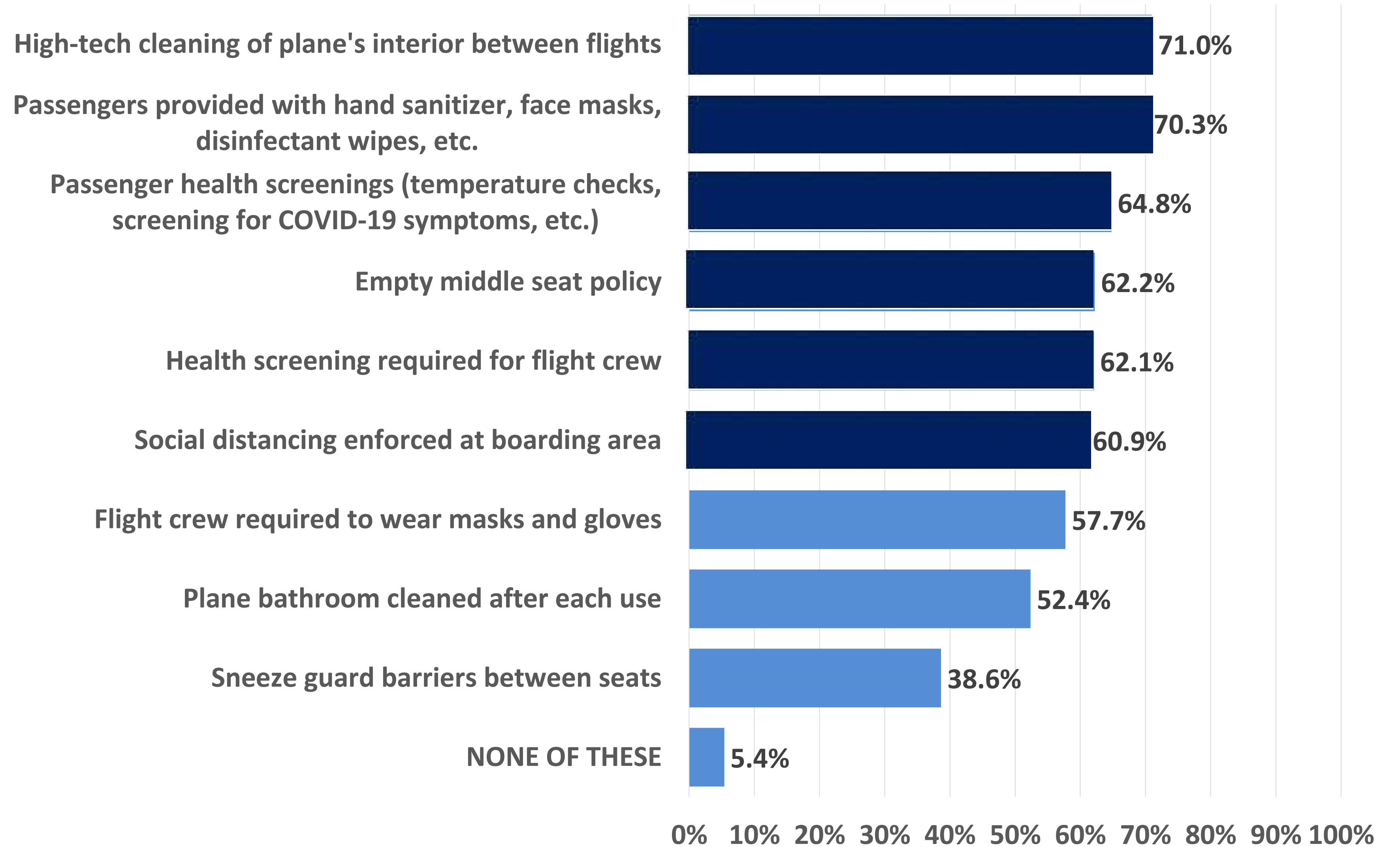
Definition: For the next question please consider **HIGH-TECH CLEANING PRACTICES** to be practices such as electrostatic sprayers with hospital-grade disinfectant or ultraviolet light technology used to sanitize surfaces in an airplane.



Desired Operational Practices: Commercial Airlines

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices do you think should be used?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

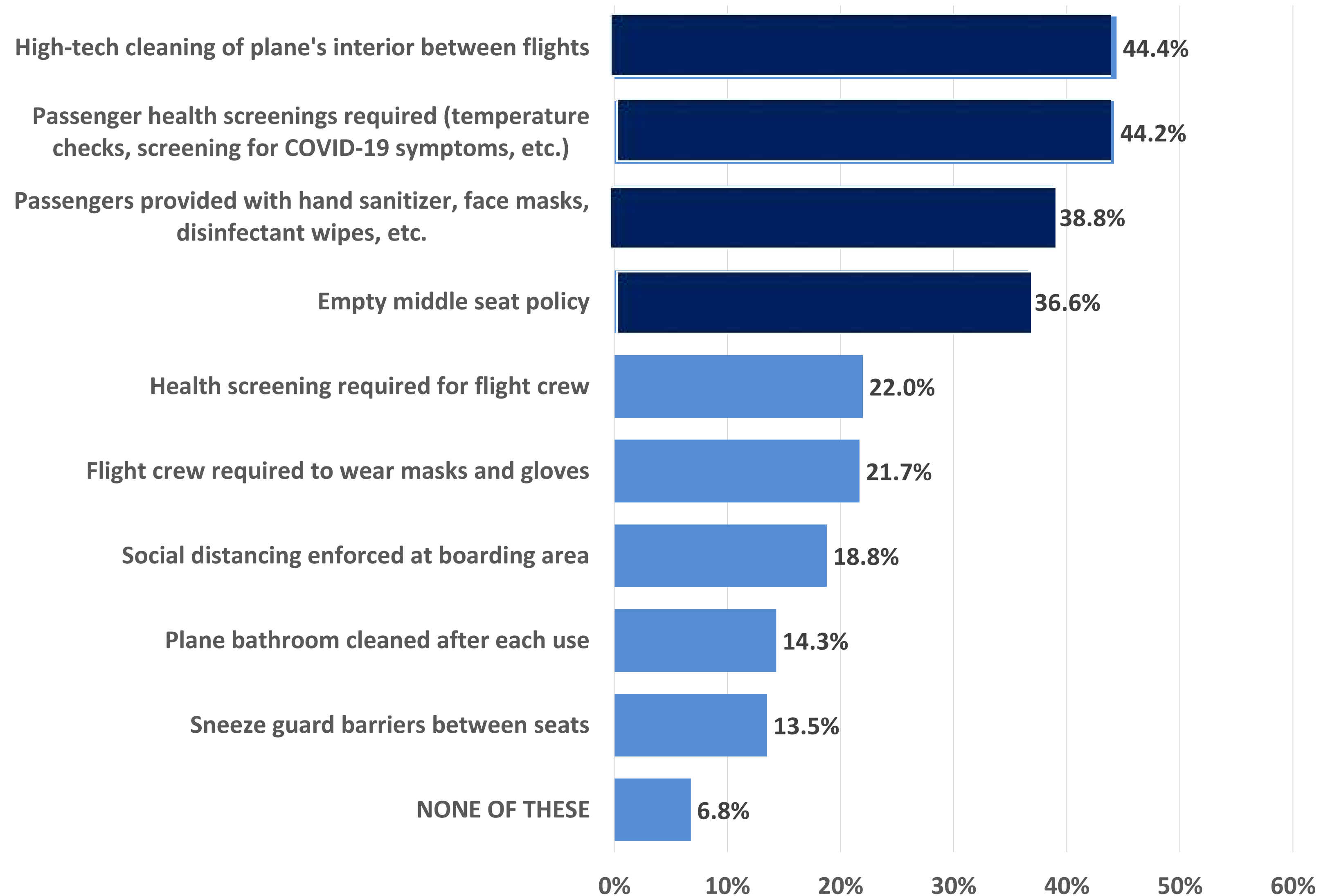


Most Important Operational Practices : Commercial Airlines

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the airline is looking out for your health?

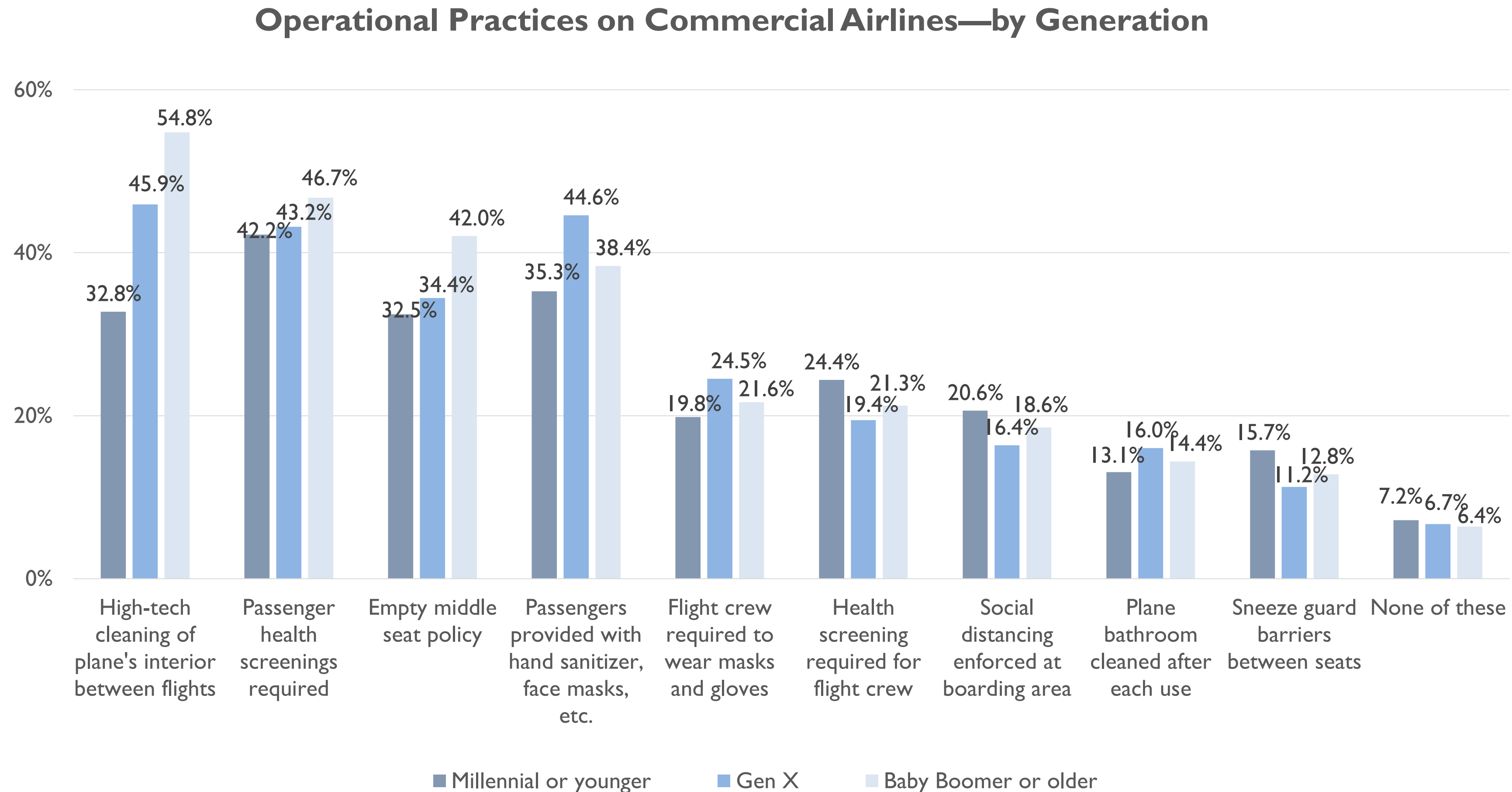
(Please select the 3 that would be most important to you)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)





Desired Operational Practices on Commercial Airlines—by Generation



Question: If traveling on a COMMERCIAL AIRLINE in the future, which operational practices would MAKE YOU FEEL MOST CONFIDENT that the airline is looking out for your health? (Please select the 3 that would be most important to you)

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)



TRAVEL

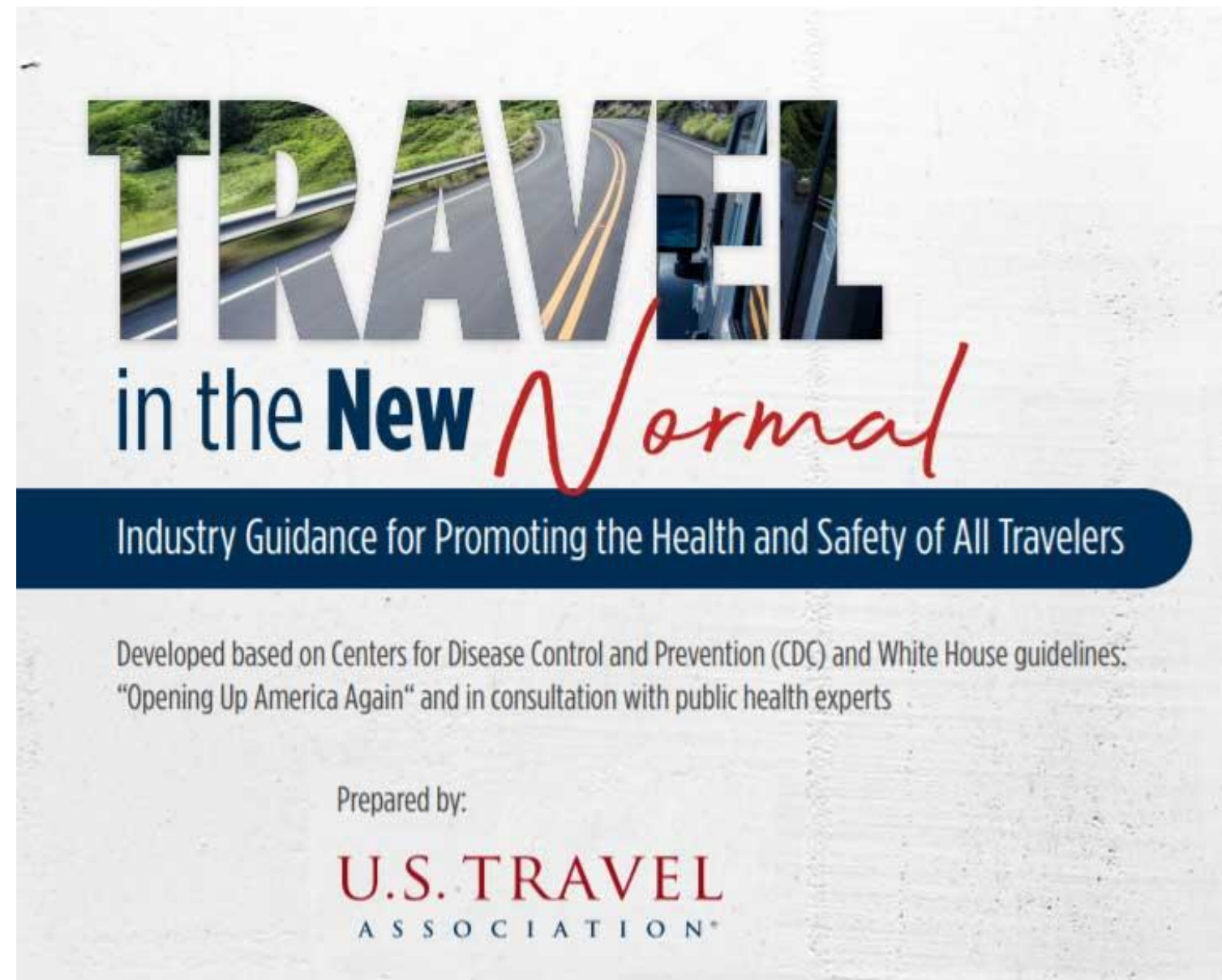
in the **New** *Normal*

Industry Guidance for Promoting the Health and Safety of All Travelers

Developed based on Centers for Disease Control and Prevention (CDC) and White House guidelines: "Opening Up America Again" and in consultation with public health experts

Prepared by:

U.S. TRAVEL
ASSOCIATION®



The "Travel in the New Normal" guidance is focused on six main areas:

- Adapt operations, modify employee practices and/or redesign public spaces to help protect employees and customers.
- Consider implementing touchless solutions, where practical
- Travel businesses should adopt and implement enhanced sanitation procedures specifically designed to combat the transmission of COVID-19.
- Promote health screening measures for employees
- Establish a set of procedures aligned with CDC guidance should an employee test positive for COVID-19.
- Follow best practices in food and beverage service to promote health of employees and customers.

HOTELS

Exclusive: Hotel industry issues coronavirus safety guidelines ahead of anticipated travel surge

David Oliver USA TODAY

Published 12:01 a.m. ET May 4, 2020 | Updated 9:16 a.m. ET May 4, 2020



Coronavirus: Airbnb has new cleaning policies for hosts, guests

Airbnb is establishing a new "cleaning protocol" for their rental property hosts and guests, stemming from the coronavirus outbreak. USA TODAY

Hotels around the country are prepping for travelers to start showing up again amid the coronavirus pandemic. But how can guests know that it's safe to stay there?

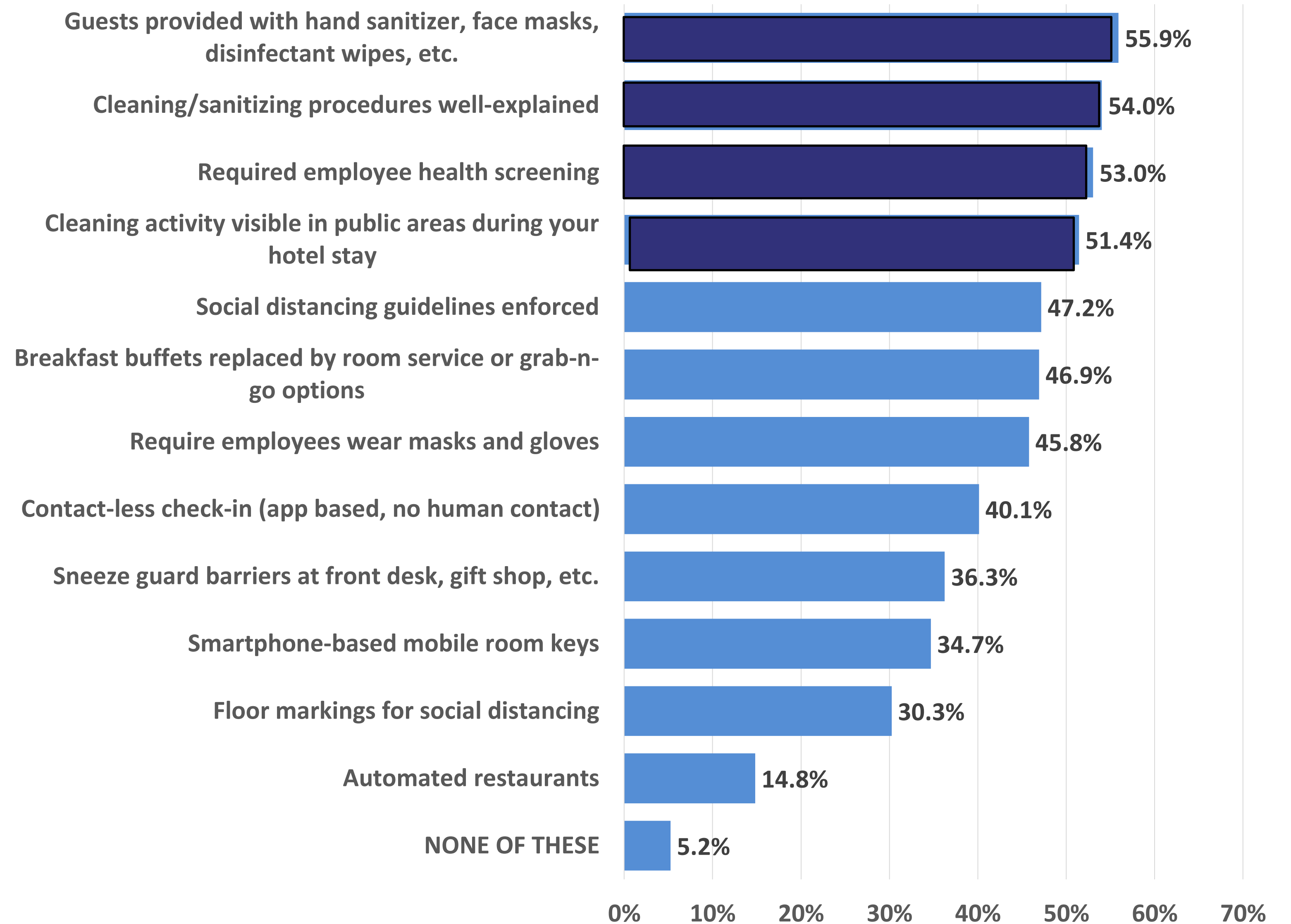
Advertisement

Advertisement

Desired Operational Practices: Hotels

Question: When staying in a hotel in the future, which operational practices do you think should be used?

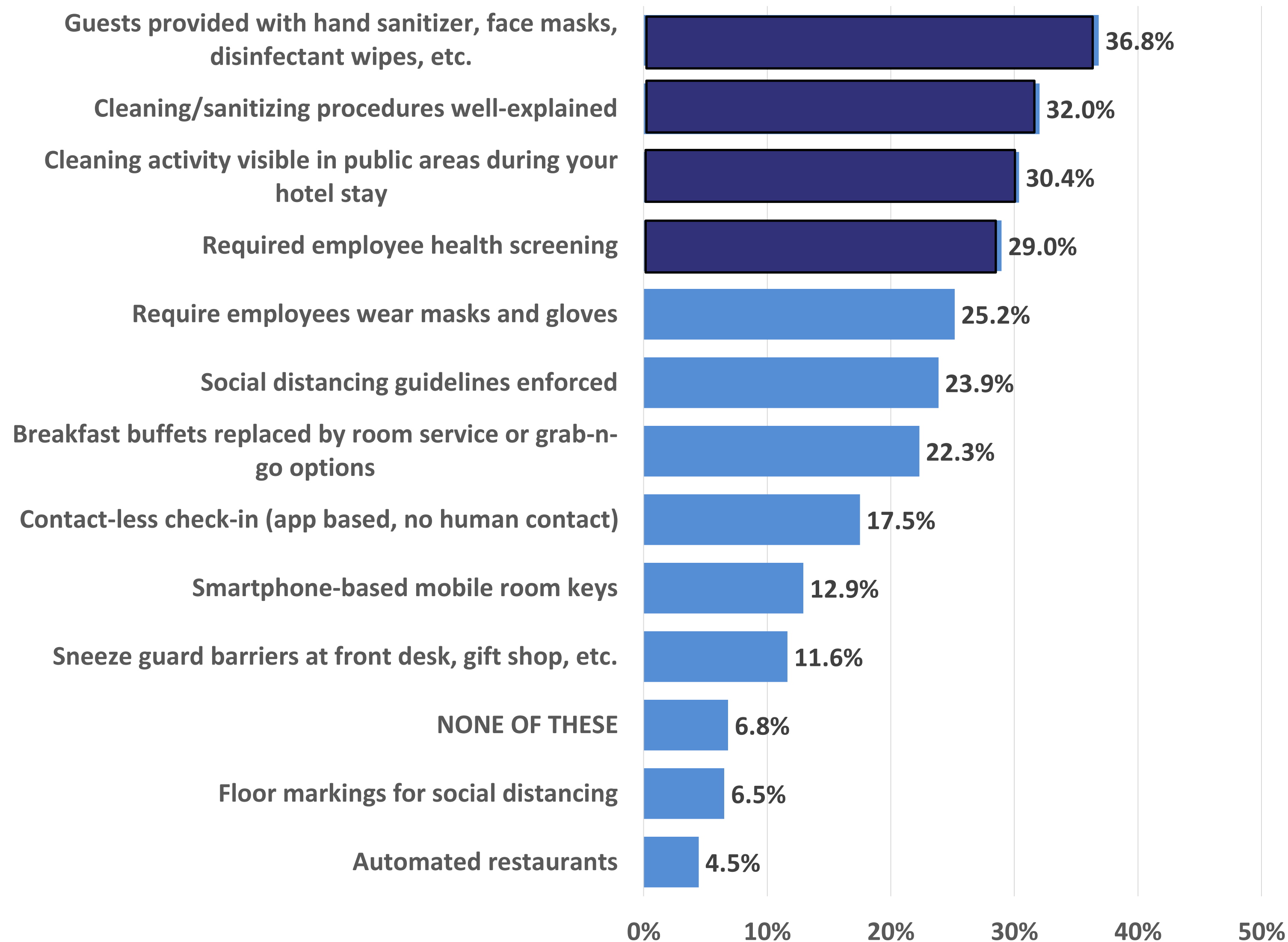
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Most Important Operational Practices: Hotels

Question: When staying in a hotel in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the hotel is looking out for your health? Please select the practices that would be most important to you.

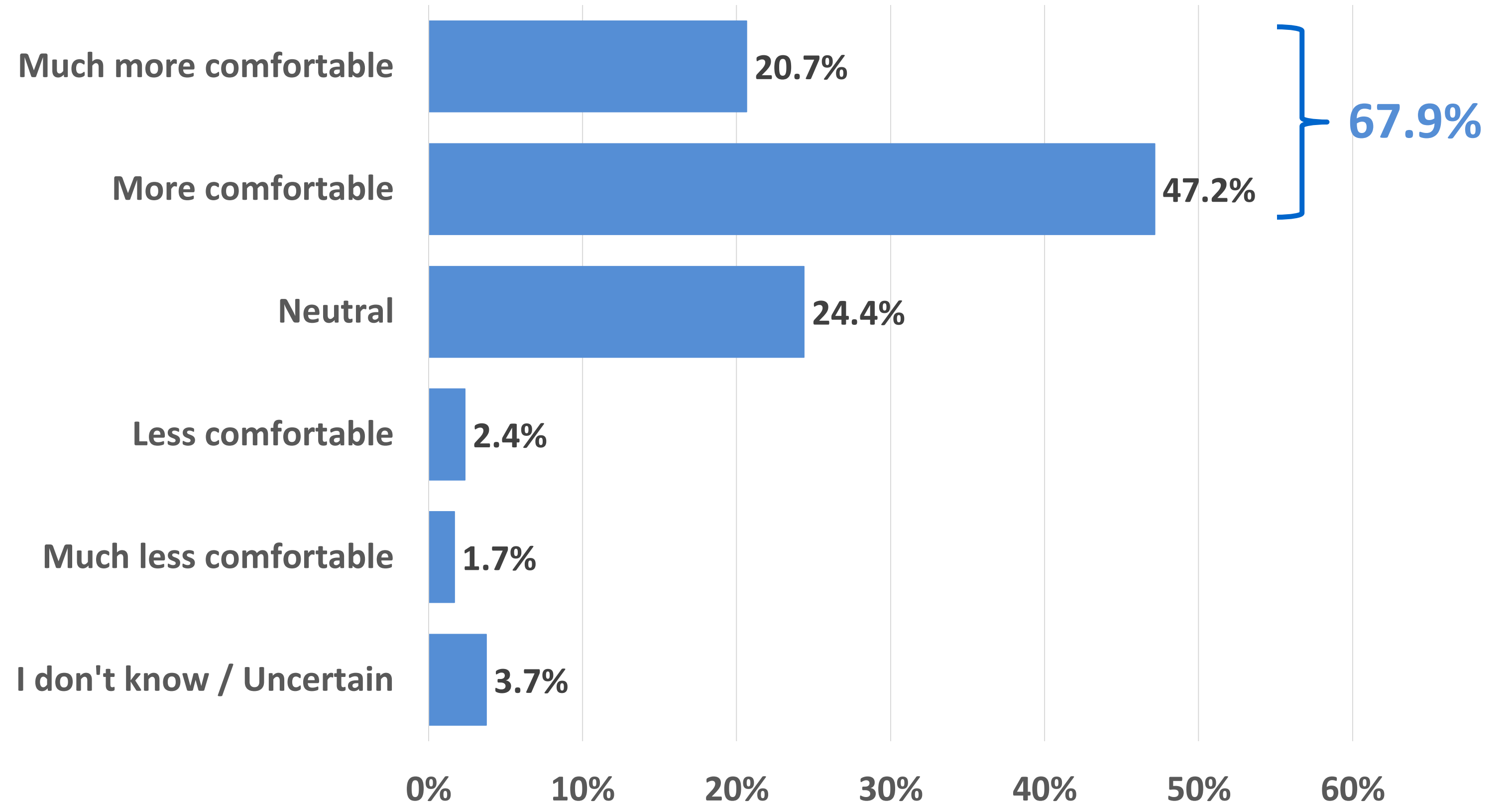
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Importance of High-Tech Cleaning Protocols

Question: Suppose a hotel used such high-tech cleaning practices. How would that affect your comfort level in staying at that hotel?

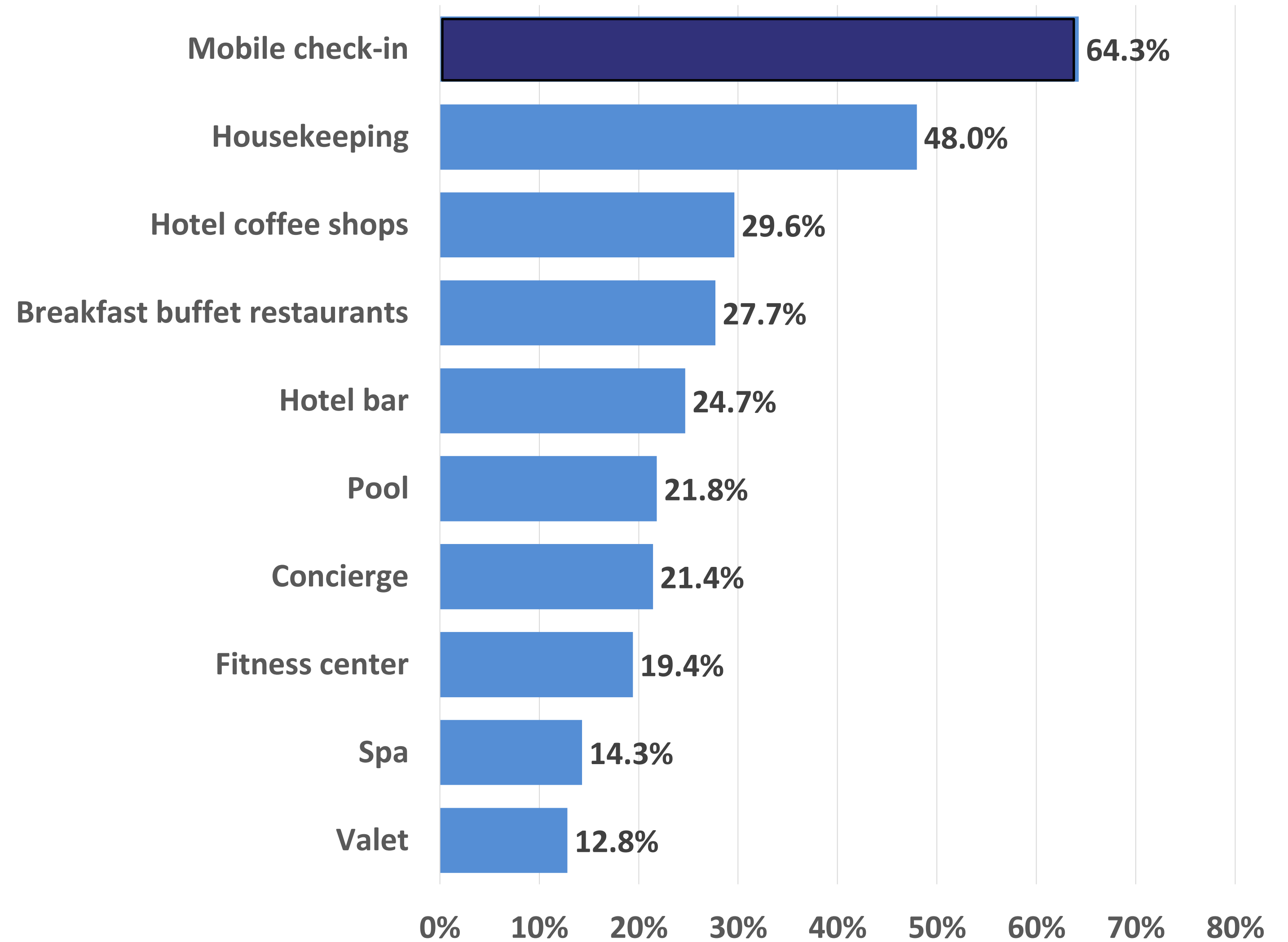
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Services During Next Hotel Stay

Question: The next time you stay in a hotel, how likely would you be to use these features/services?

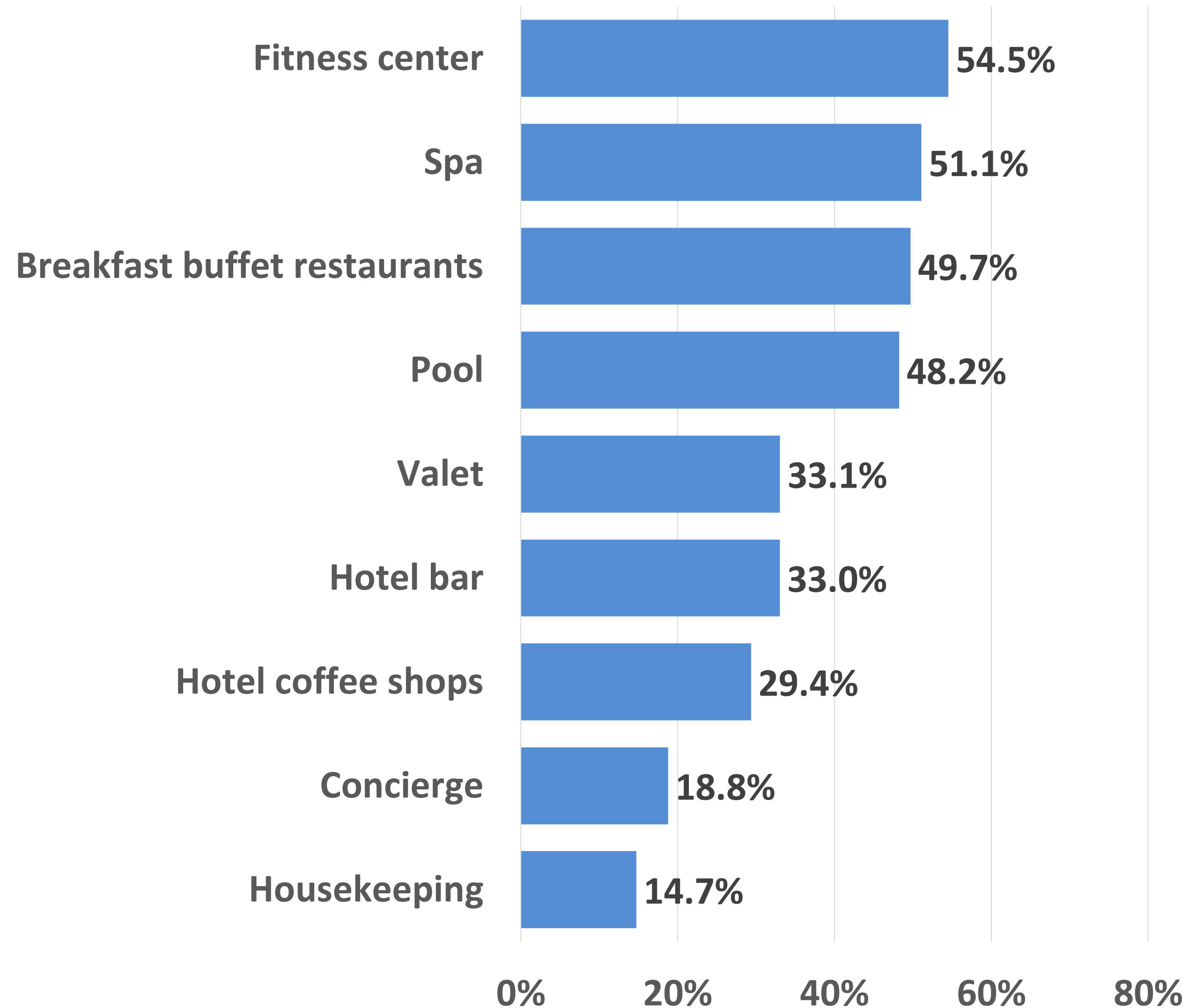
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Hotel Services Impacted by Coronavirus Situation

Question: The next time you stay in a hotel, which features/services (IF ANY) will you be LESS LIKELY TO USE as a result of the coronavirus situation? (Select all that apply)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



KEY TAKEAWAYS

- **Only 1-in-4 travelers are comfortable with the idea of getting on a flight right now**
- **Only 1-in-4 travelers plans to get on a plane before summer ends**
- **Airlines will need to consider an array of safety measures before attracting back the large crowds of the past:**
 - **High-tech cleaning**
 - **Passenger health screening**
 - **Hand sanitizers, face masks, wipes**
- **Hotels are in the same pickle:**
 - **Visible cleaning in public areas**
 - **Employee health screenings**
 - **Hand sanitizers, face masks, wipes**
 - **High-tech cleaning**
 - **Mobile check-in**
 - **Expect changing demand for service set**



If they feel
unsafe, will
they hold a
grudge?

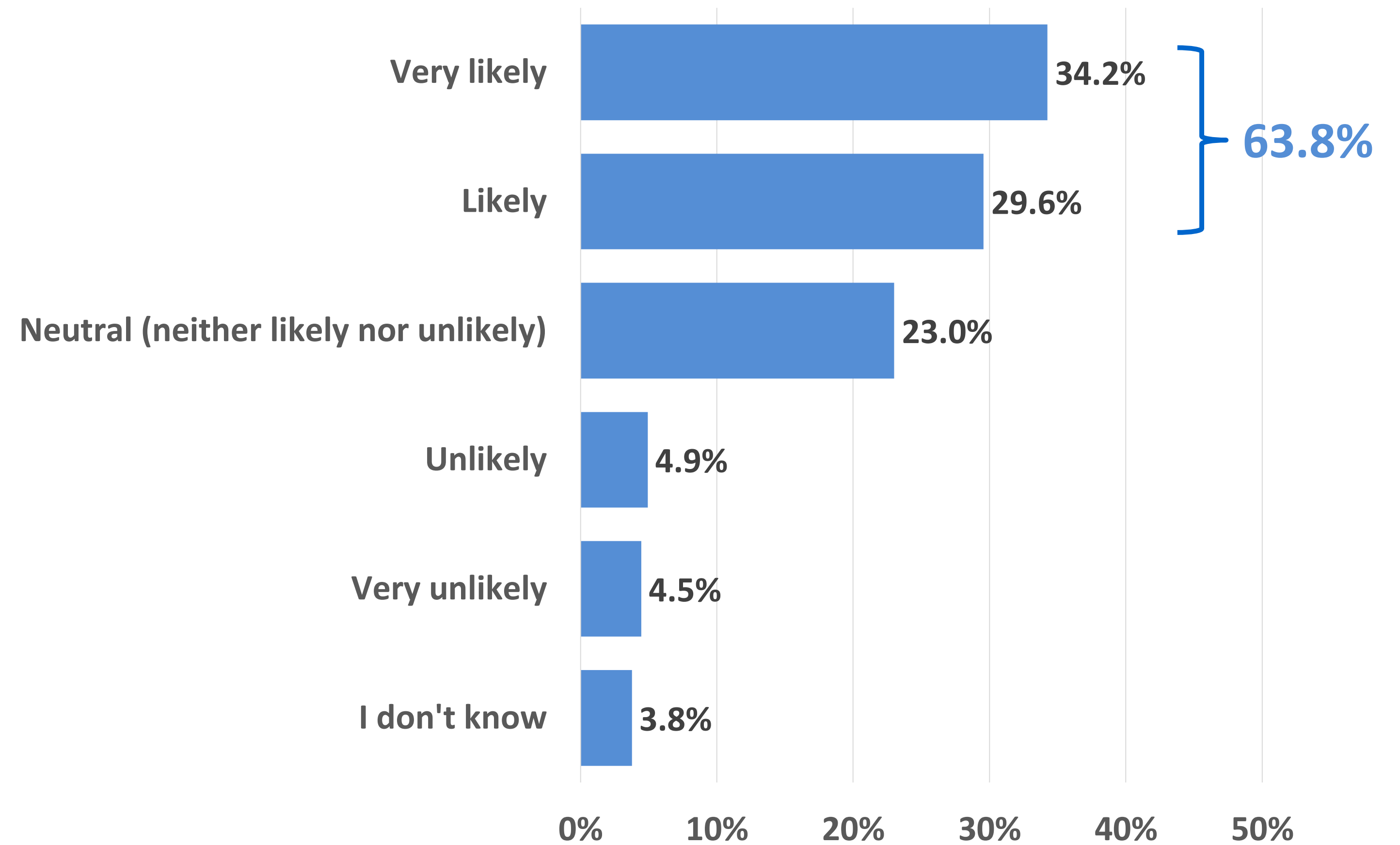


Withholding Future Business if Dissatisfied

Question: In the coming months, suppose a business (a restaurant, retail store, airline, hotel, etc) operates in a way that **DOES NOT MAKE YOU FEEL CONFIDENT** that they are looking out for your health.

How likely would you be to withhold future purchases from that business?

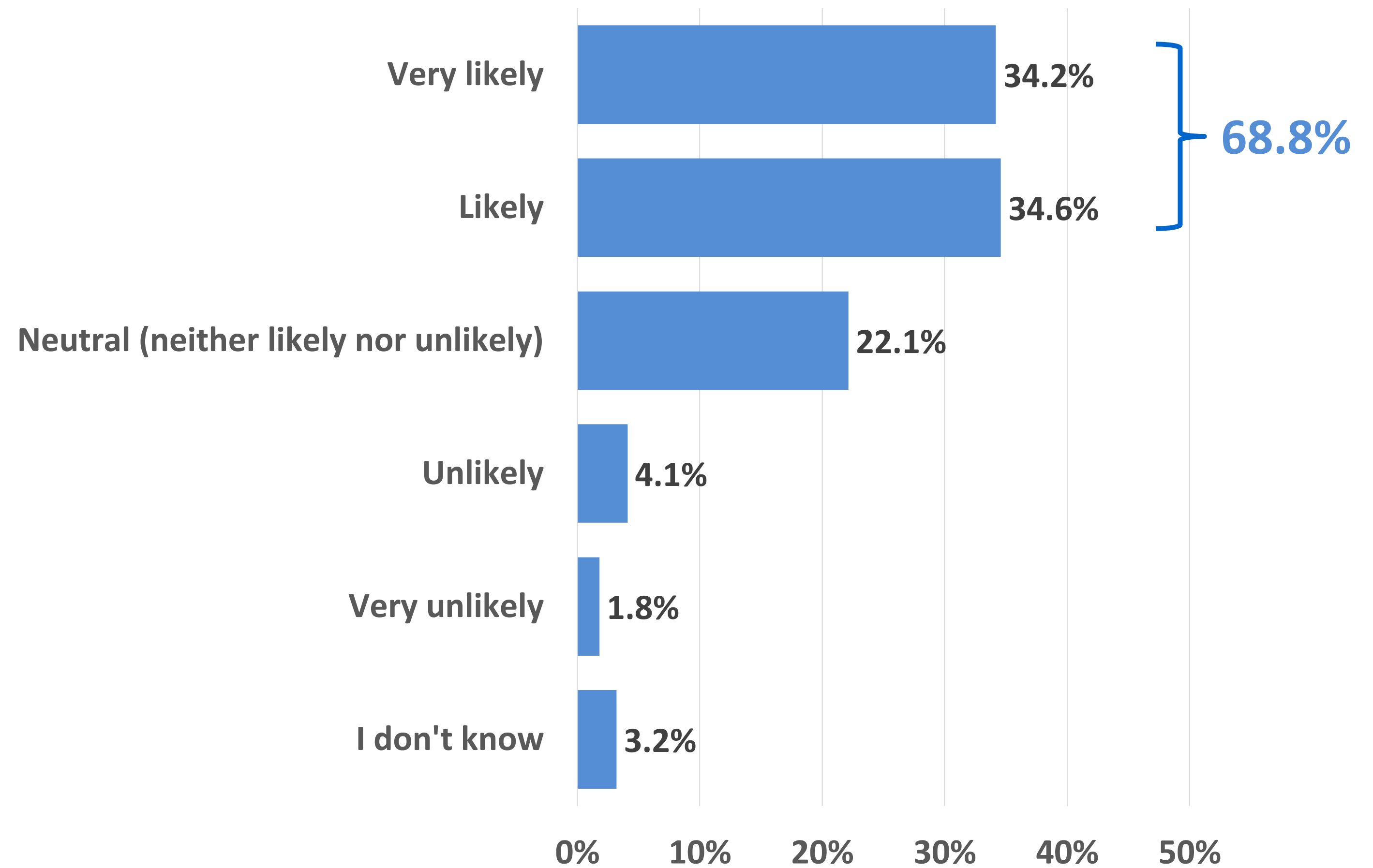
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Complaining to Friends & Relatives Business if Dissatisfied

Question: How likely would you be to tell your friends or relatives about your negative experience with that business?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

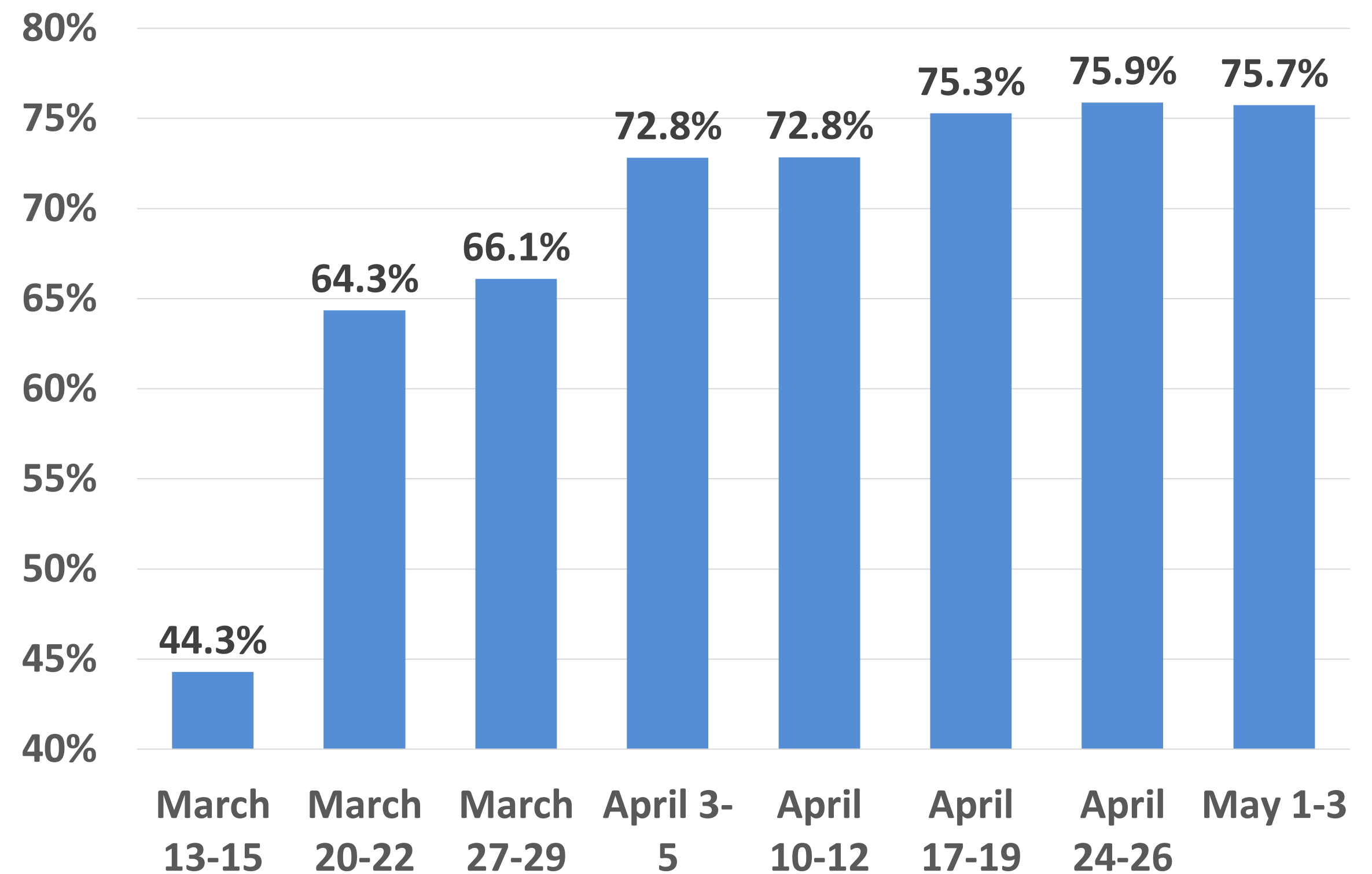
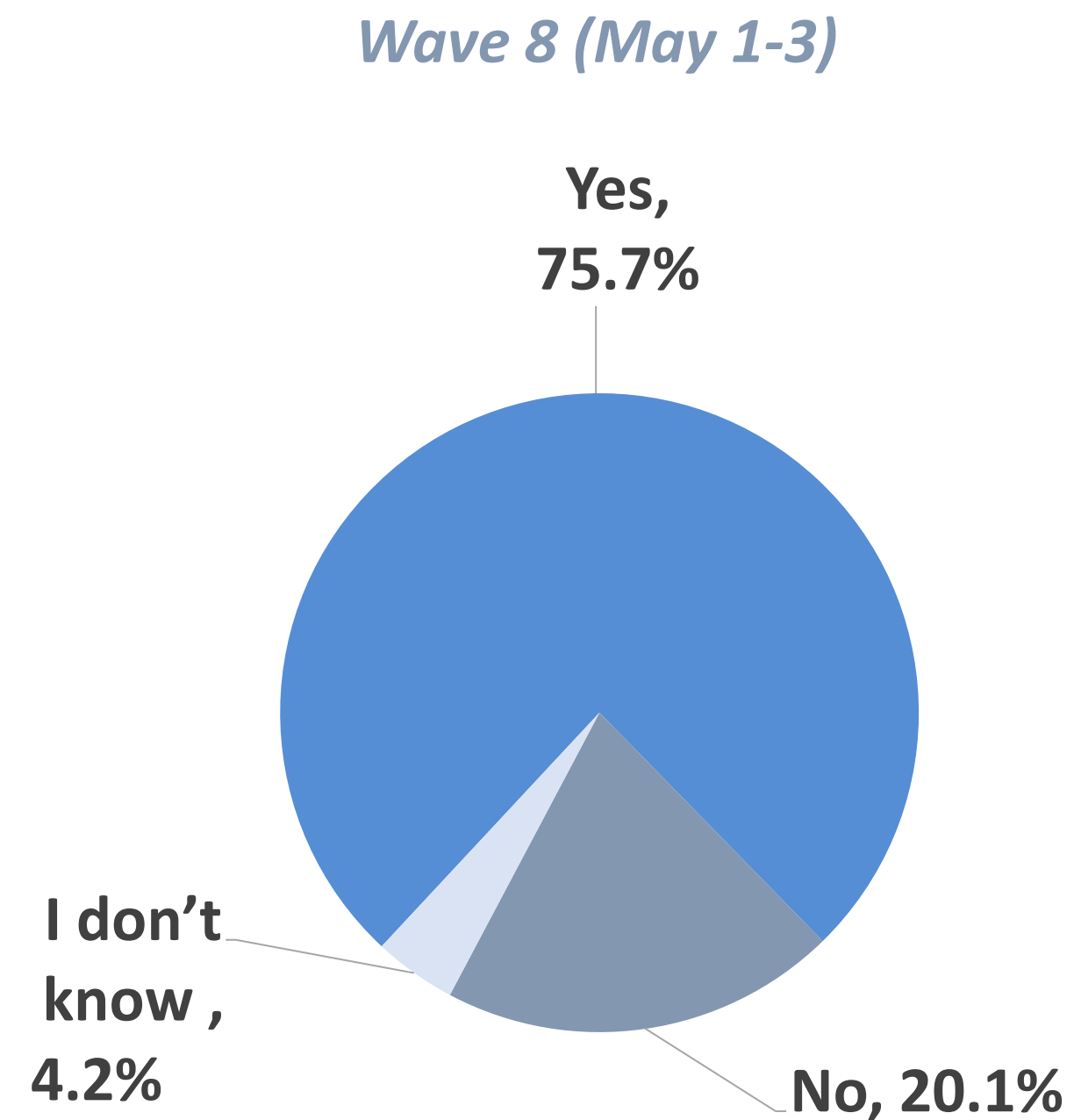


A woman with long dark hair, wearing a white face mask and a light-colored blouse, is looking back over her right shoulder. The background is a blurred airport tarmac with several people, some with luggage, and a white aircraft. The scene is dimly lit, suggesting dusk or dawn.

Looking Forward for 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.)

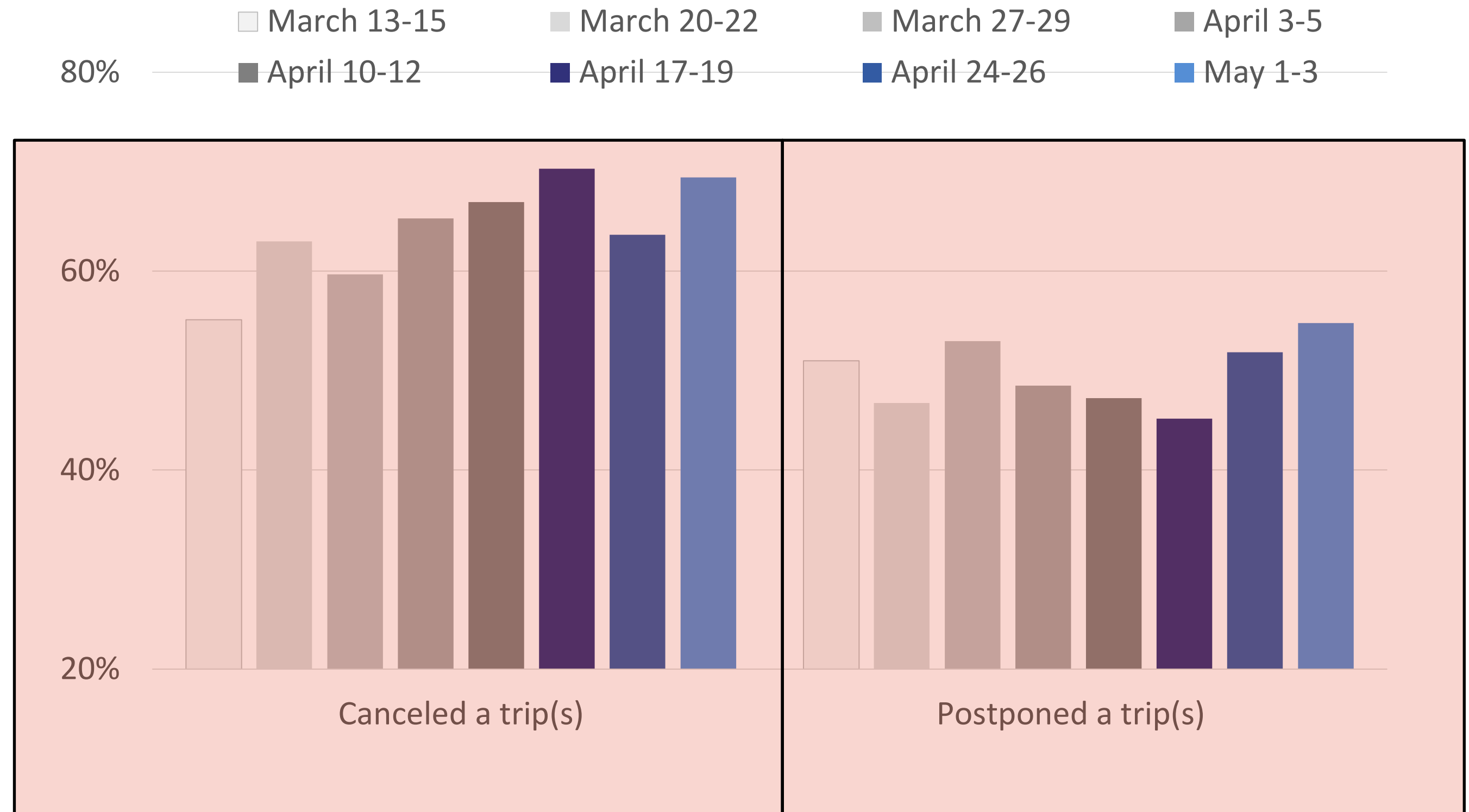
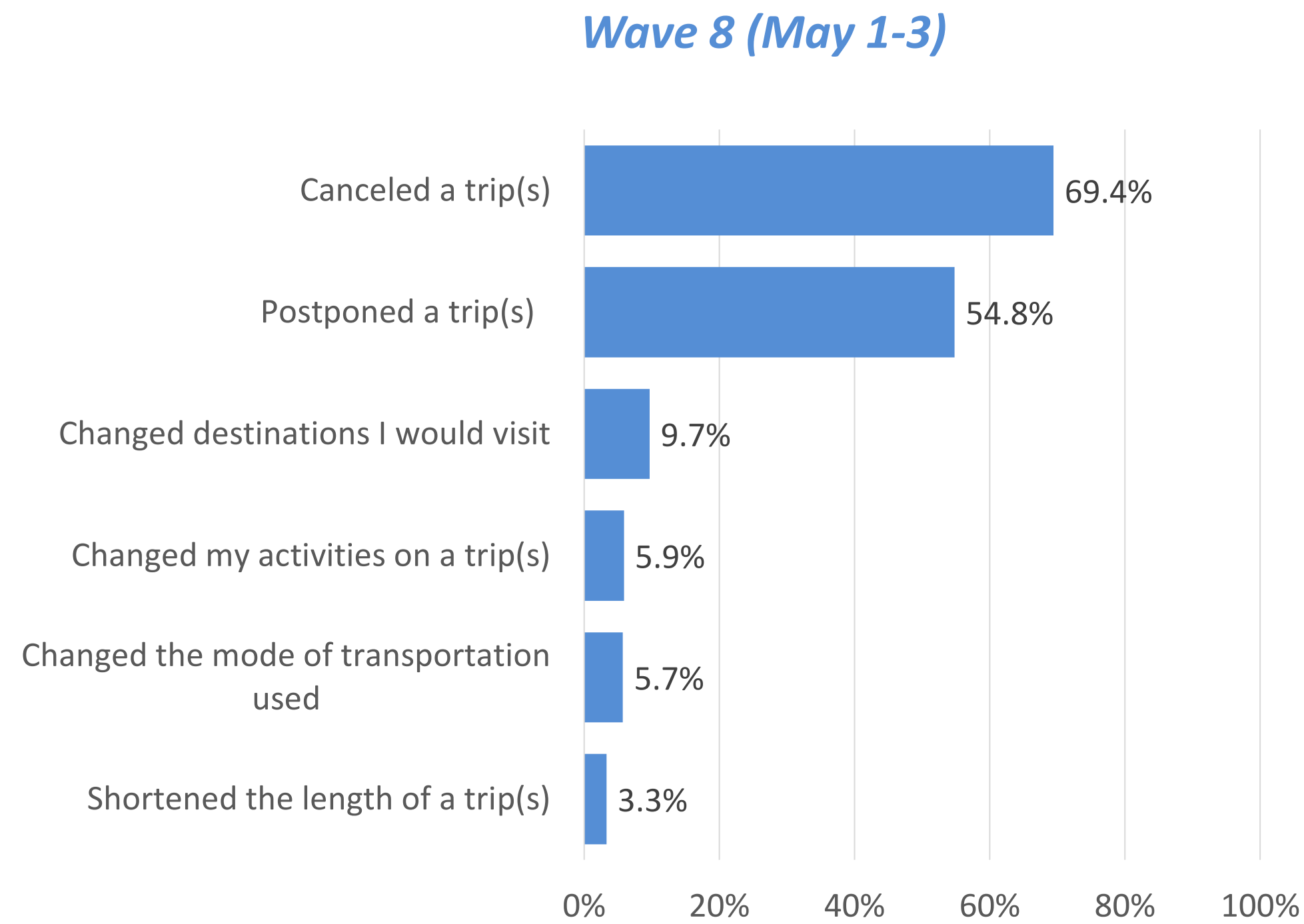


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)

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 _____.

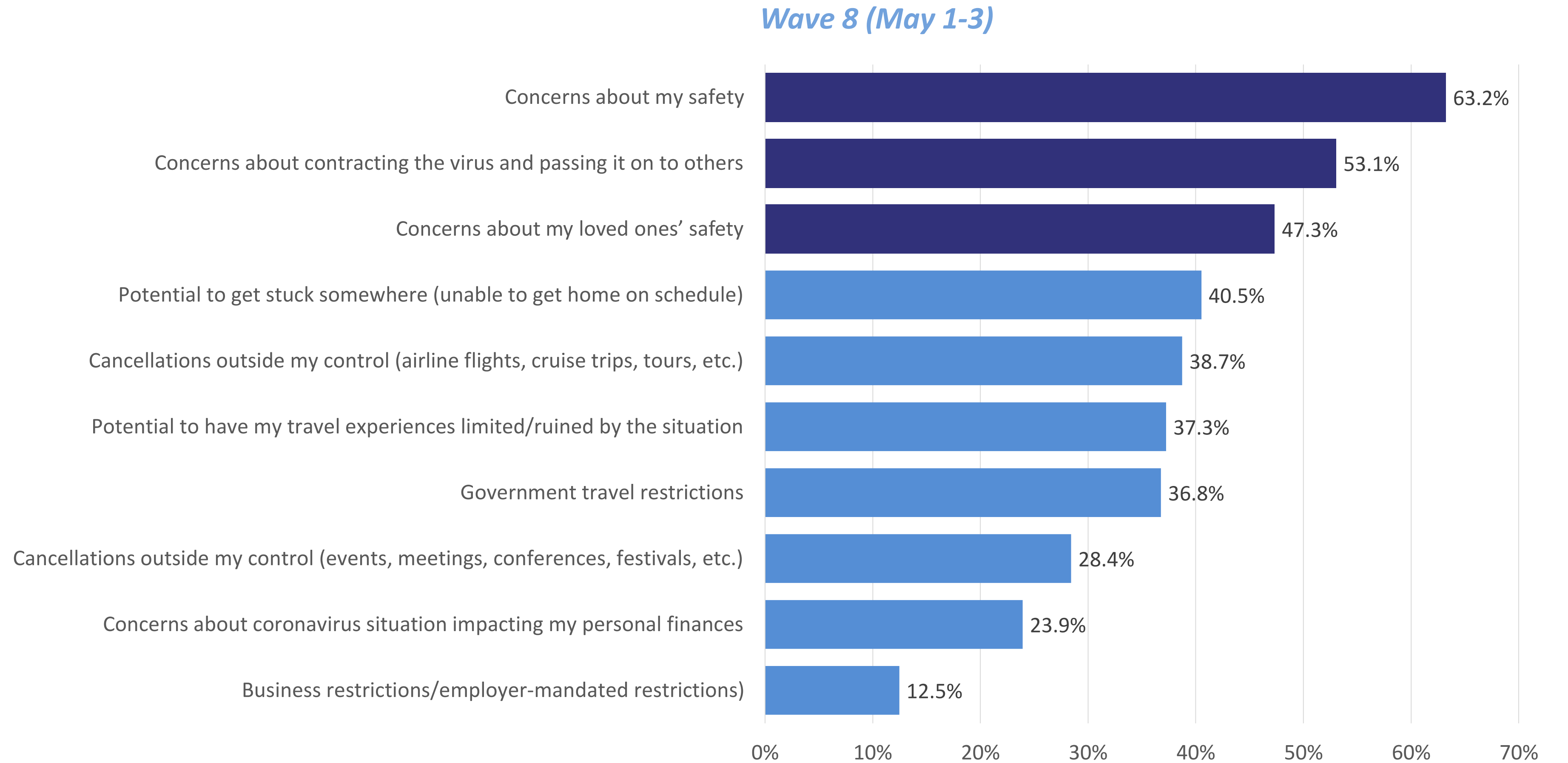


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Why the Coronavirus is Impacting Travel

Question: Which of the following are reasons the coronavirus situation has changed your travels?

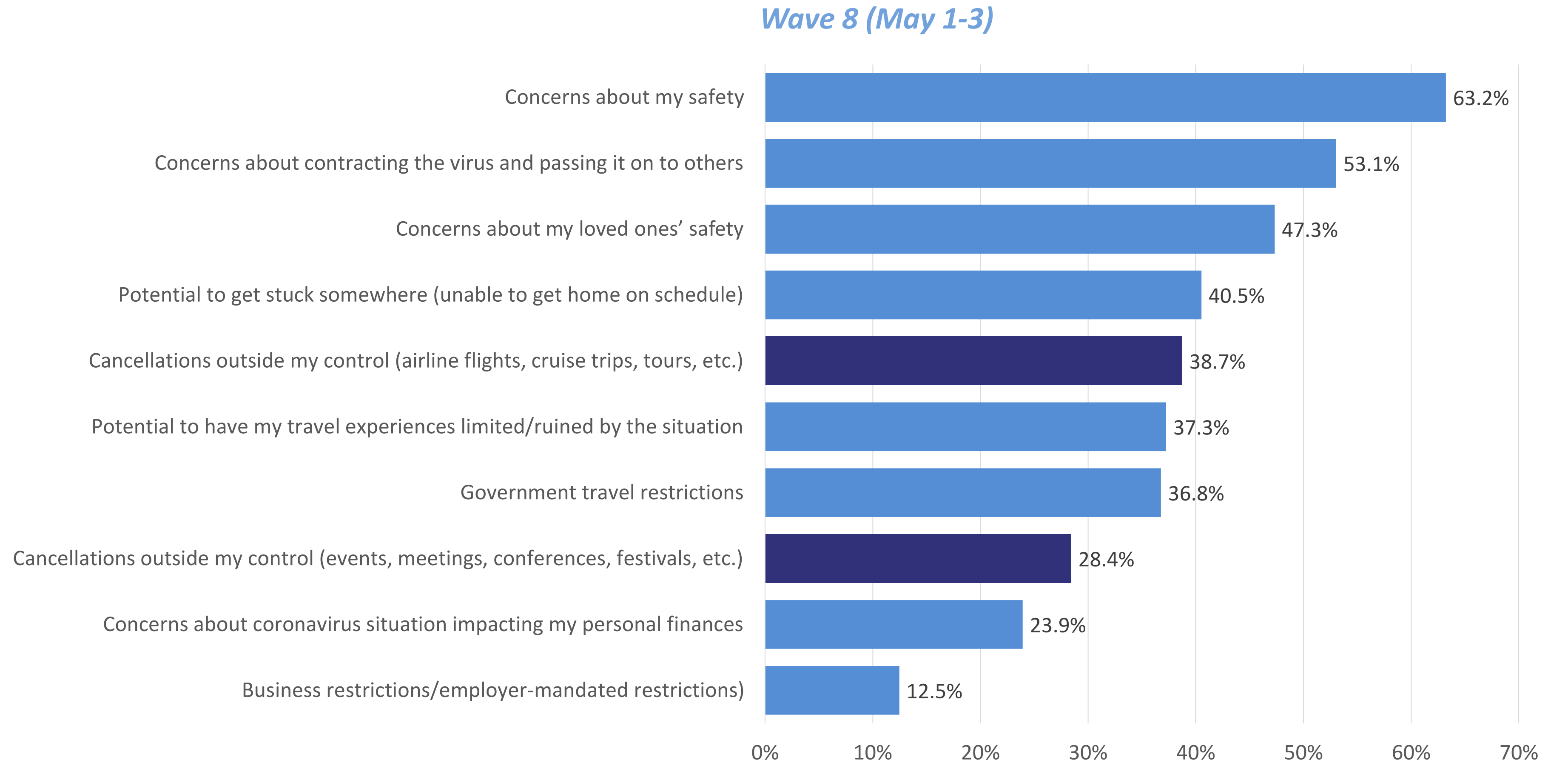
(Base: Wave 8. Respondents whose travel was impacted by the coronavirus, 926 completed surveys. Data collected May 1-3, 2020)



Why the Coronavirus is Impacting Travel

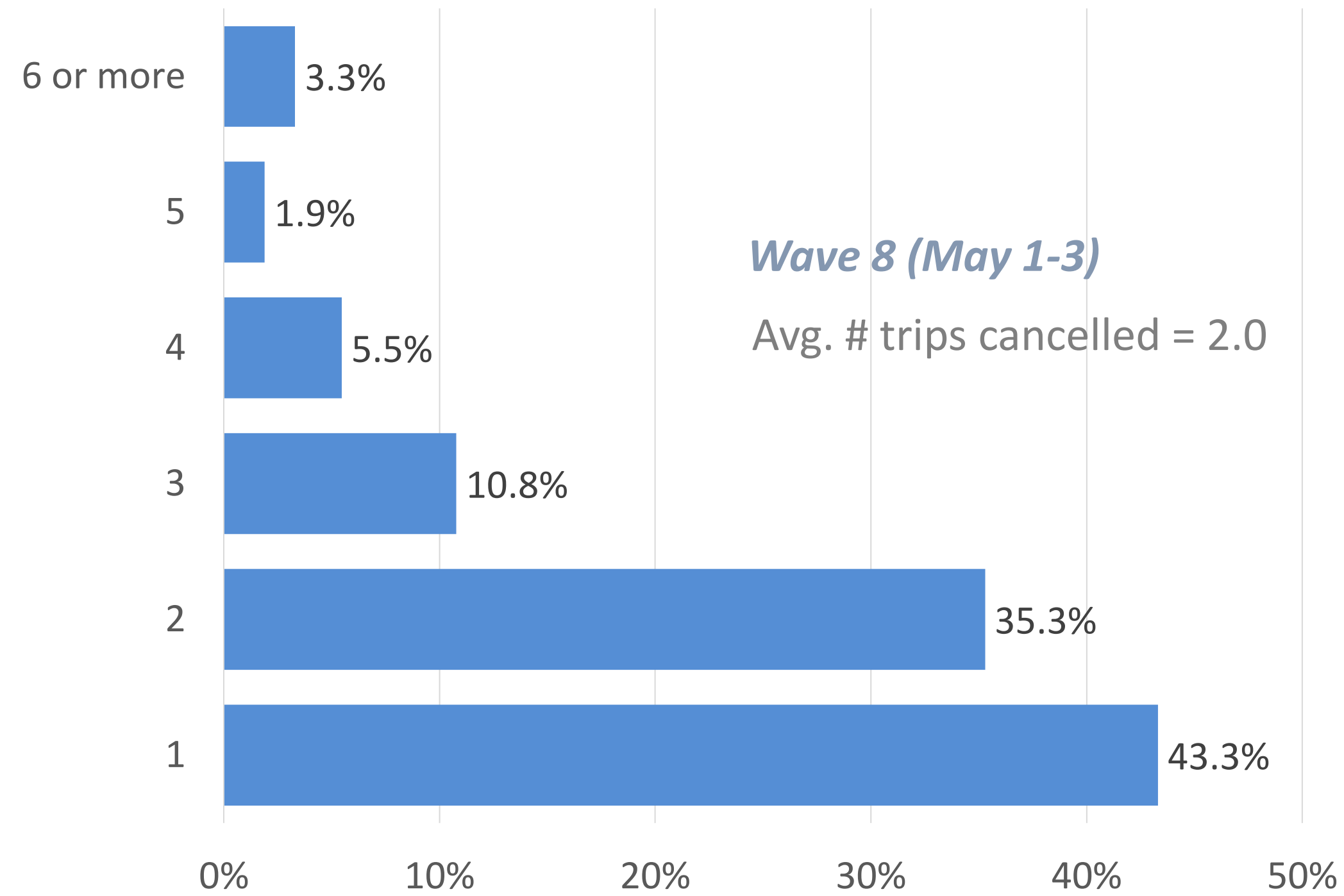
Question: Which of the following are reasons the coronavirus situation has changed your travels?

(Base: Wave 8. Respondents whose travel was impacted by the coronavirus, 926 completed surveys. Data collected May 1-3, 2020)

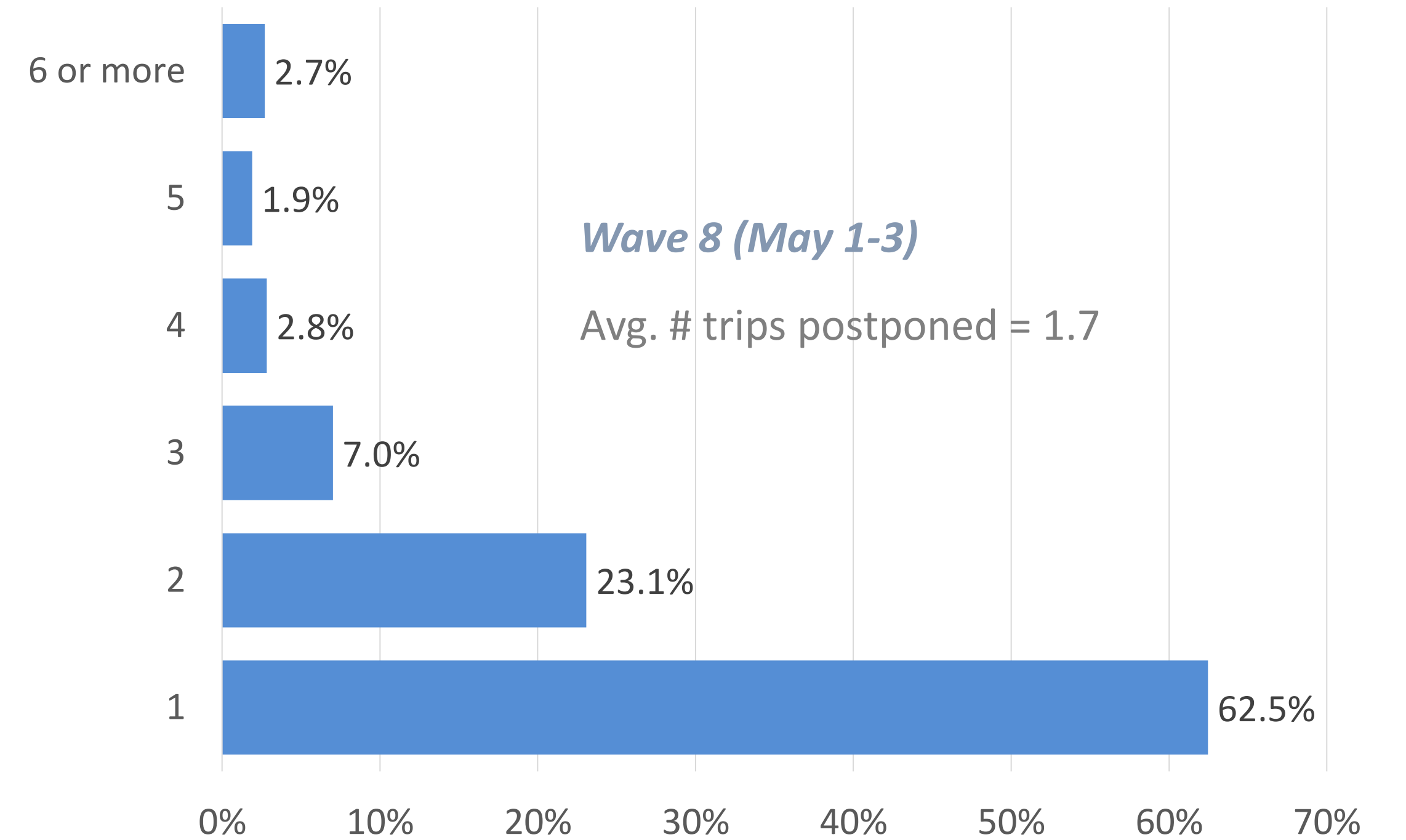


Trips Cancelled/Postponed

Question: How many trips did you cancel?



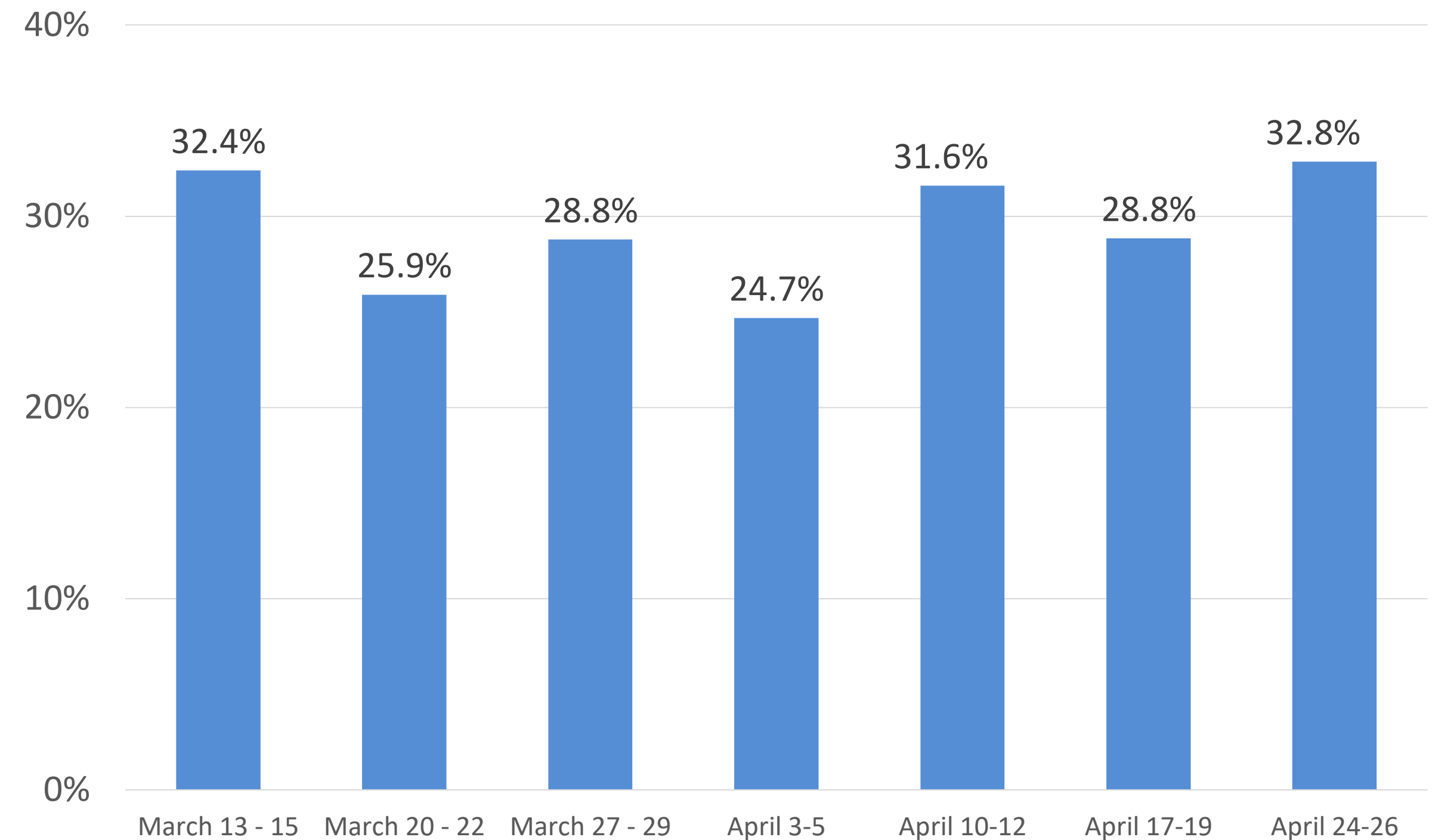
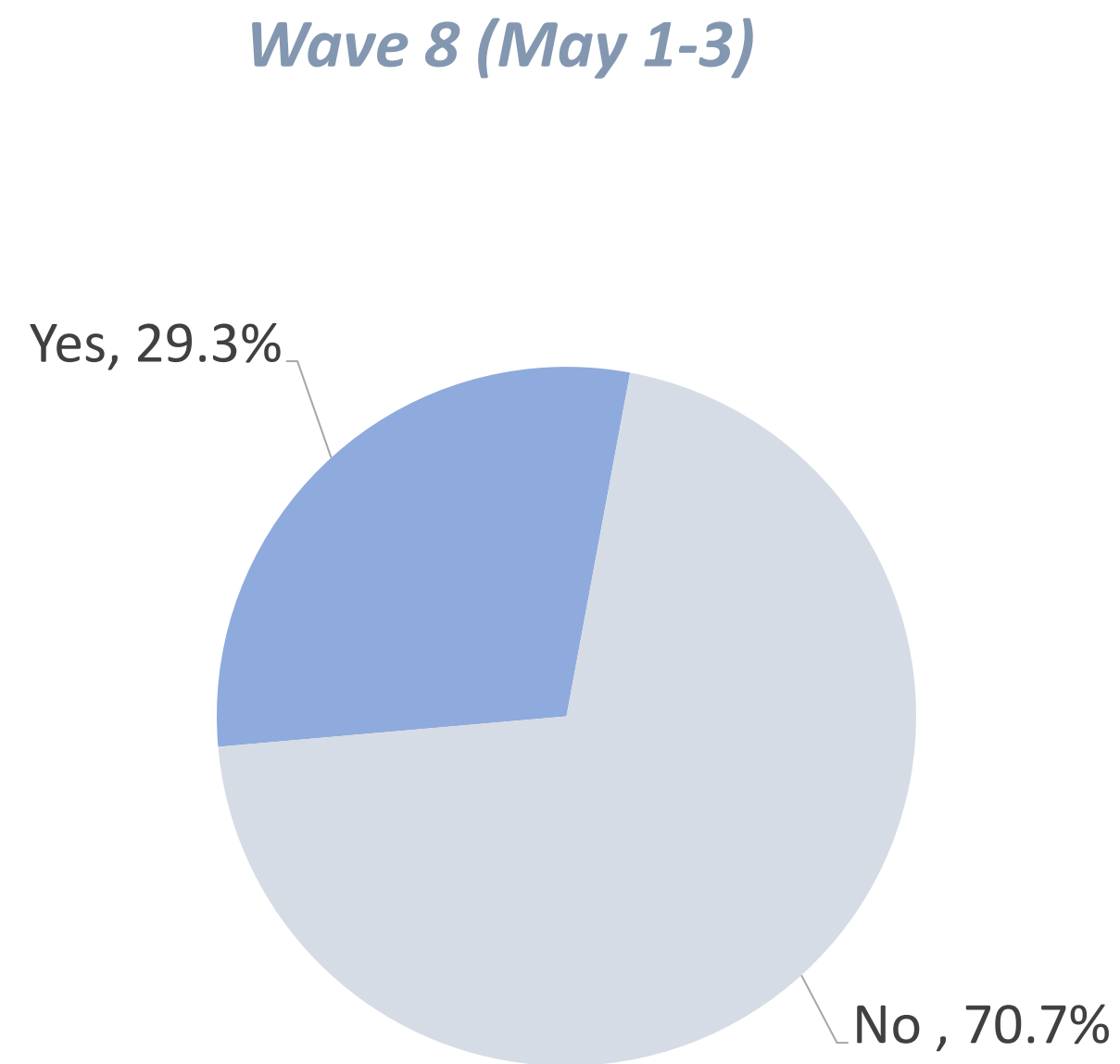
Question: How many trips did you postpone?



(Base: Wave 8, Respondents cancelling/postponing a trip, 642/508 completed surveys. Data collected May 1-3, 2020)

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)

COVID19

**Me in February planning
my summer trips**

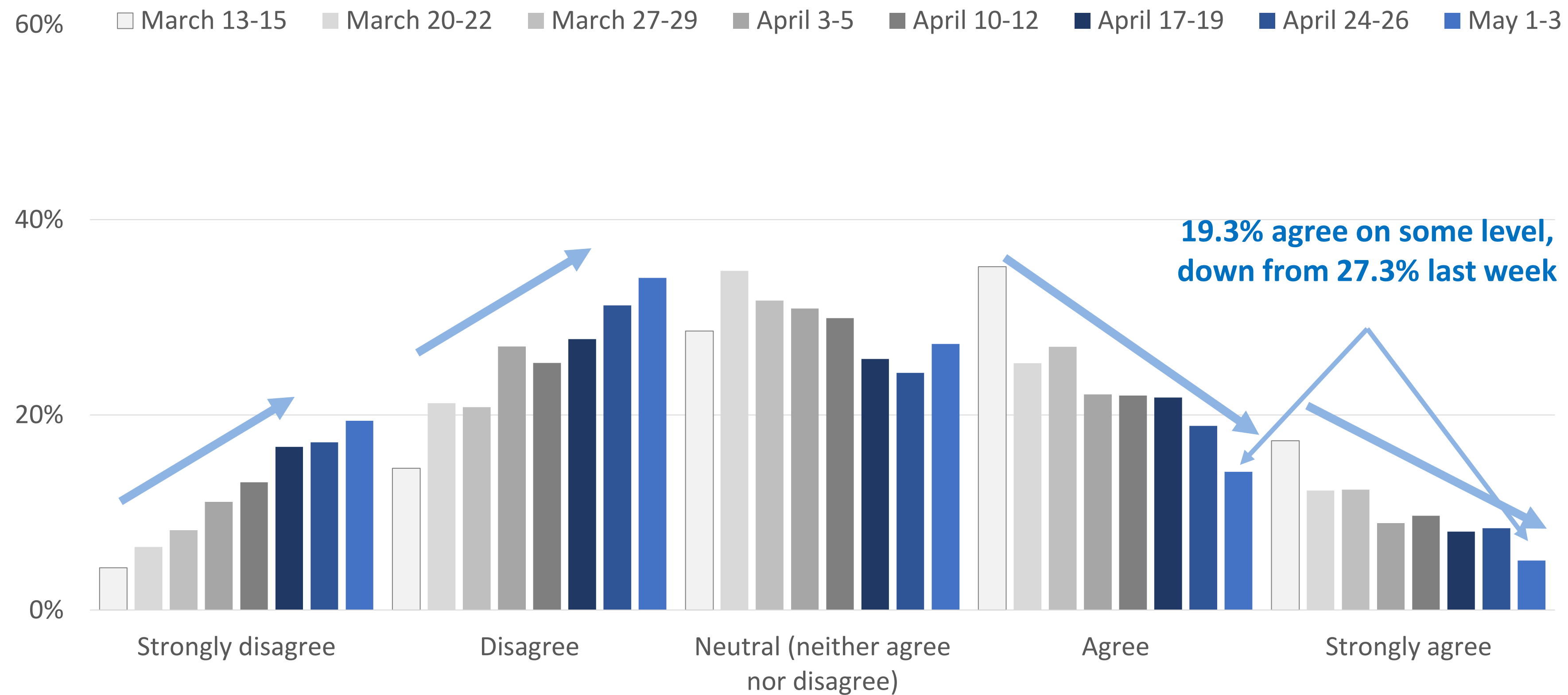
@thefakerothko

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, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



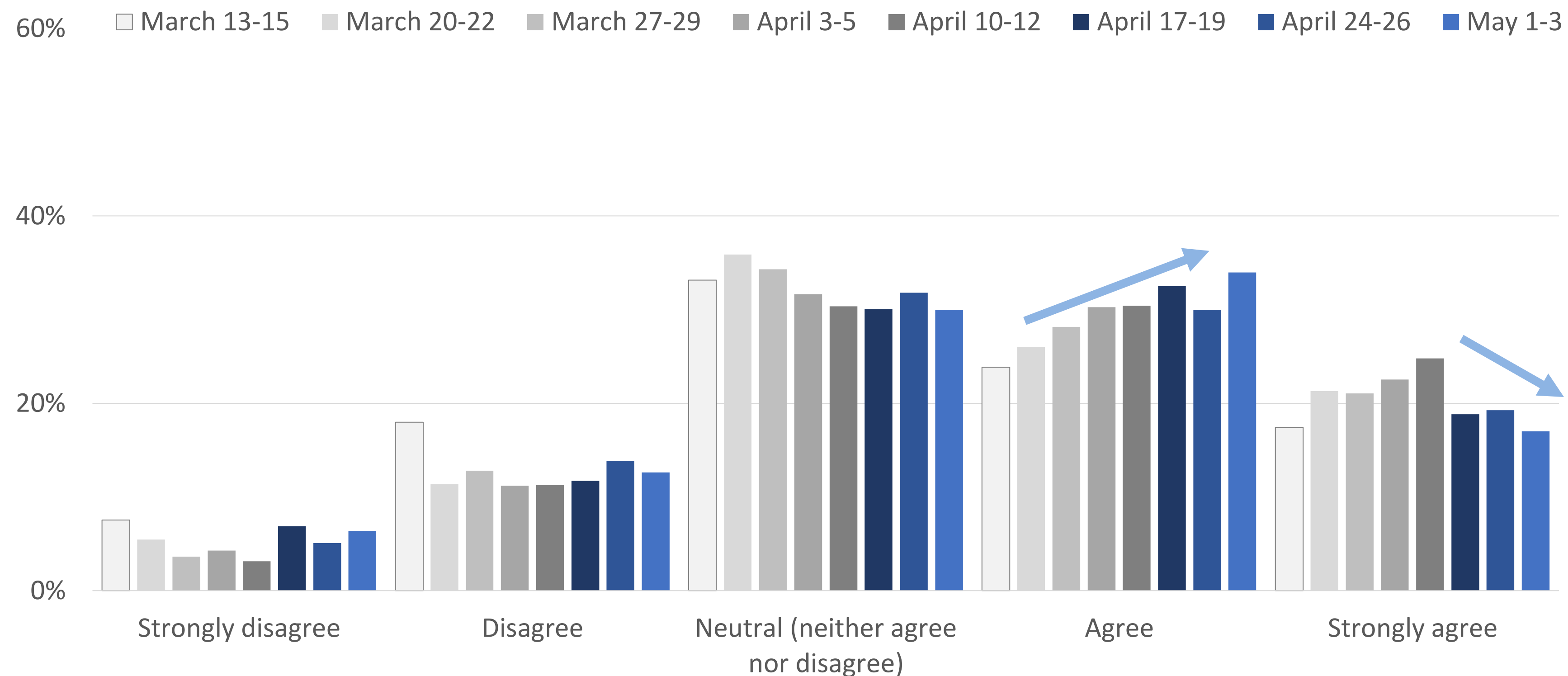
Staycations as a Replacement for Vacations

Half of American travelers still agree that staycations may end up replacing vacations this summer (51.0% vs. 49.3% last week).

How much do you agree with the following statement?

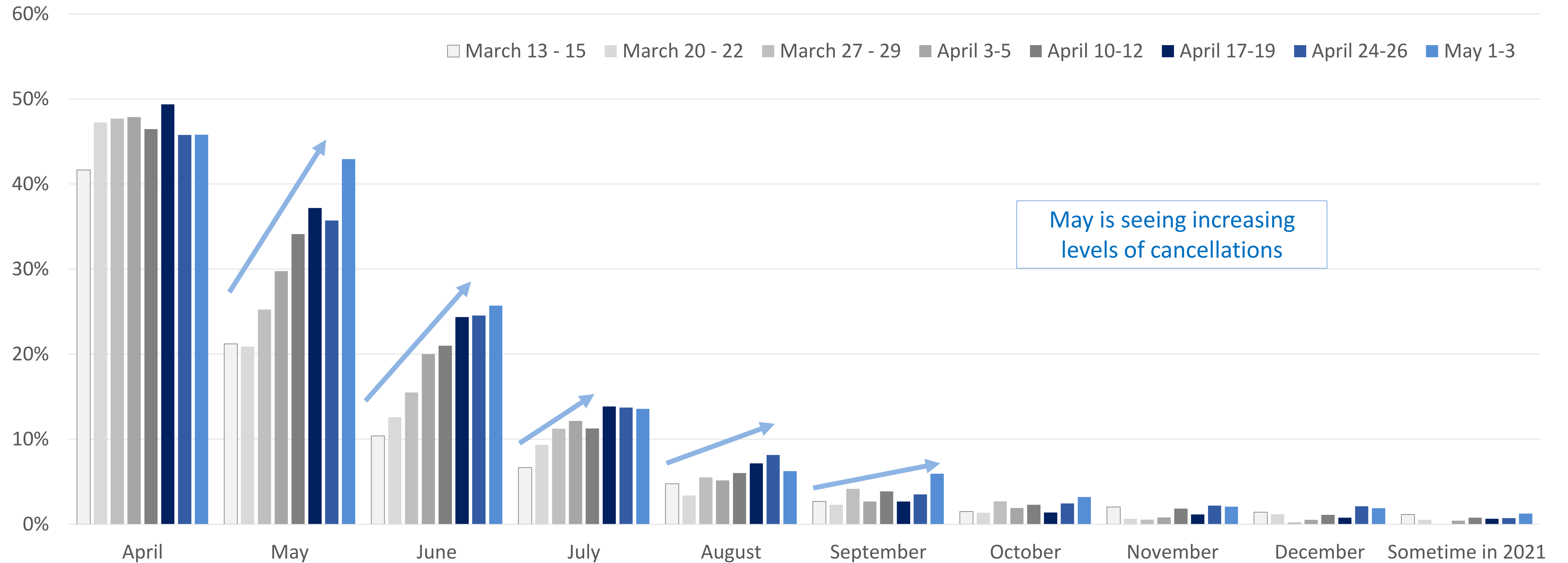
Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



Month of Trip Cancellation

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



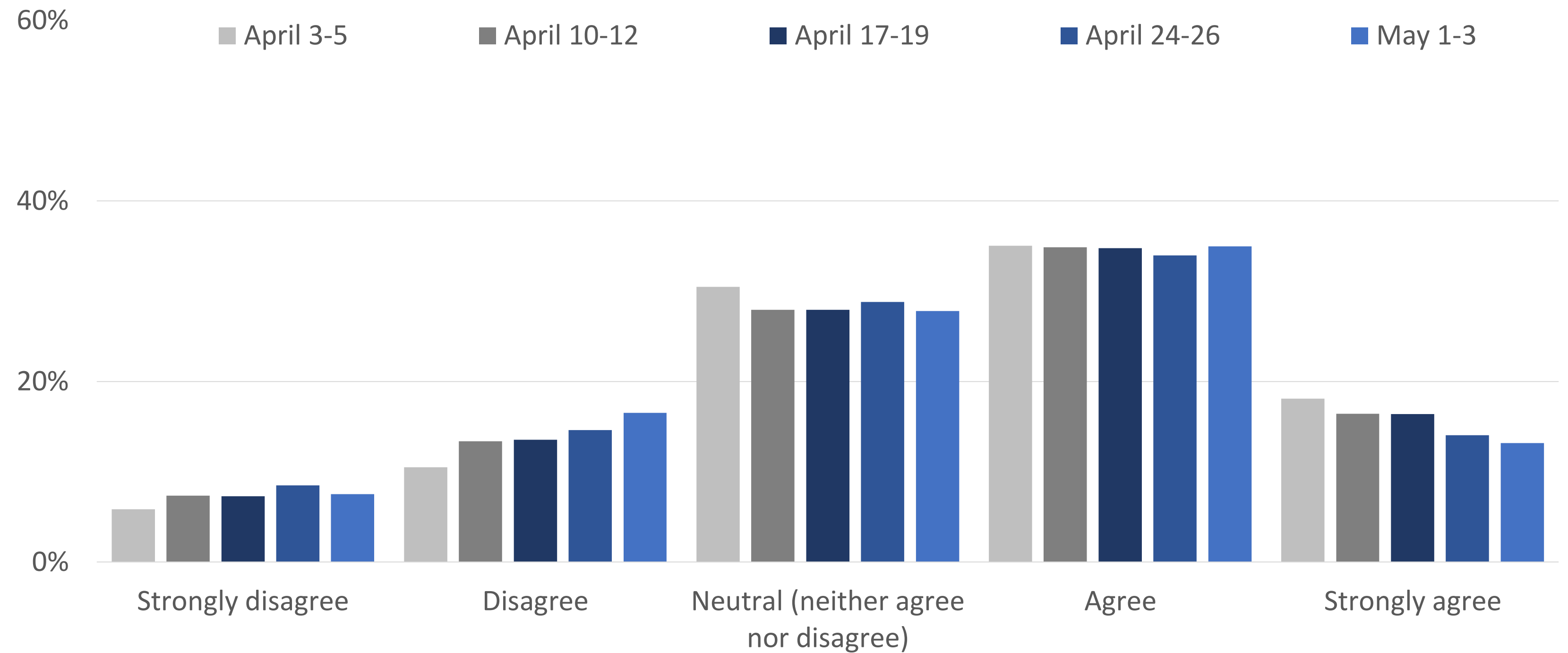
(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582 and 640 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020. Note: Data purposefully excluded from this chart for readability.)

Expectations for Fall Travel Season

How much do you agree with the following statement?

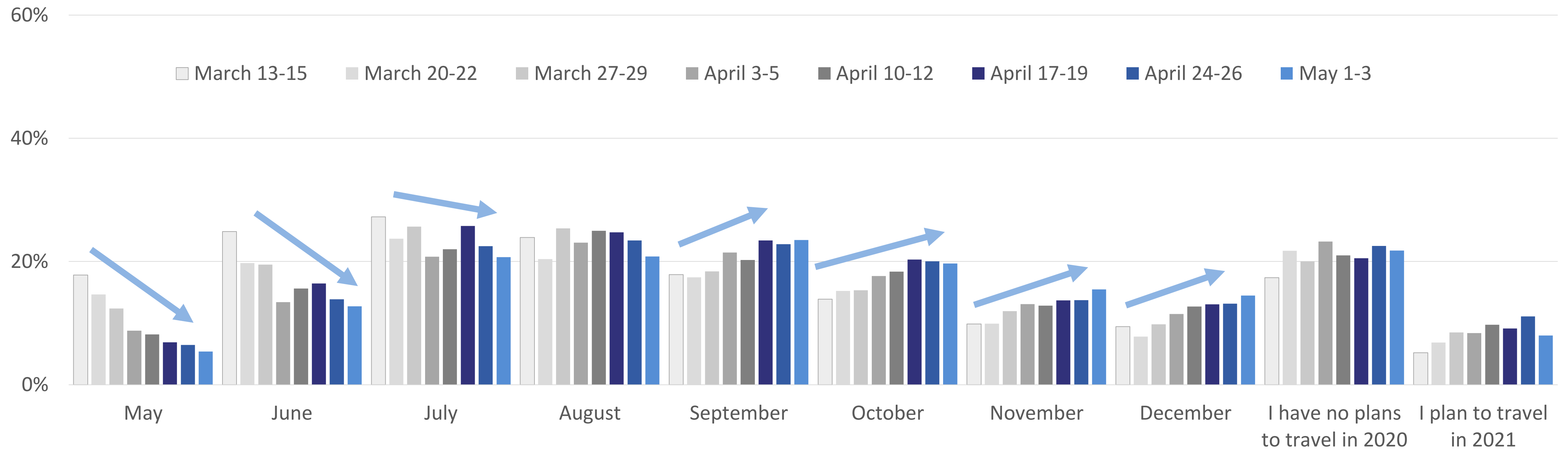
Statement: I expect that I will be traveling in the Fall of 2020.

(Base: All respondents, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, , May 1-3, 2020)



Upcoming Travel Plans

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



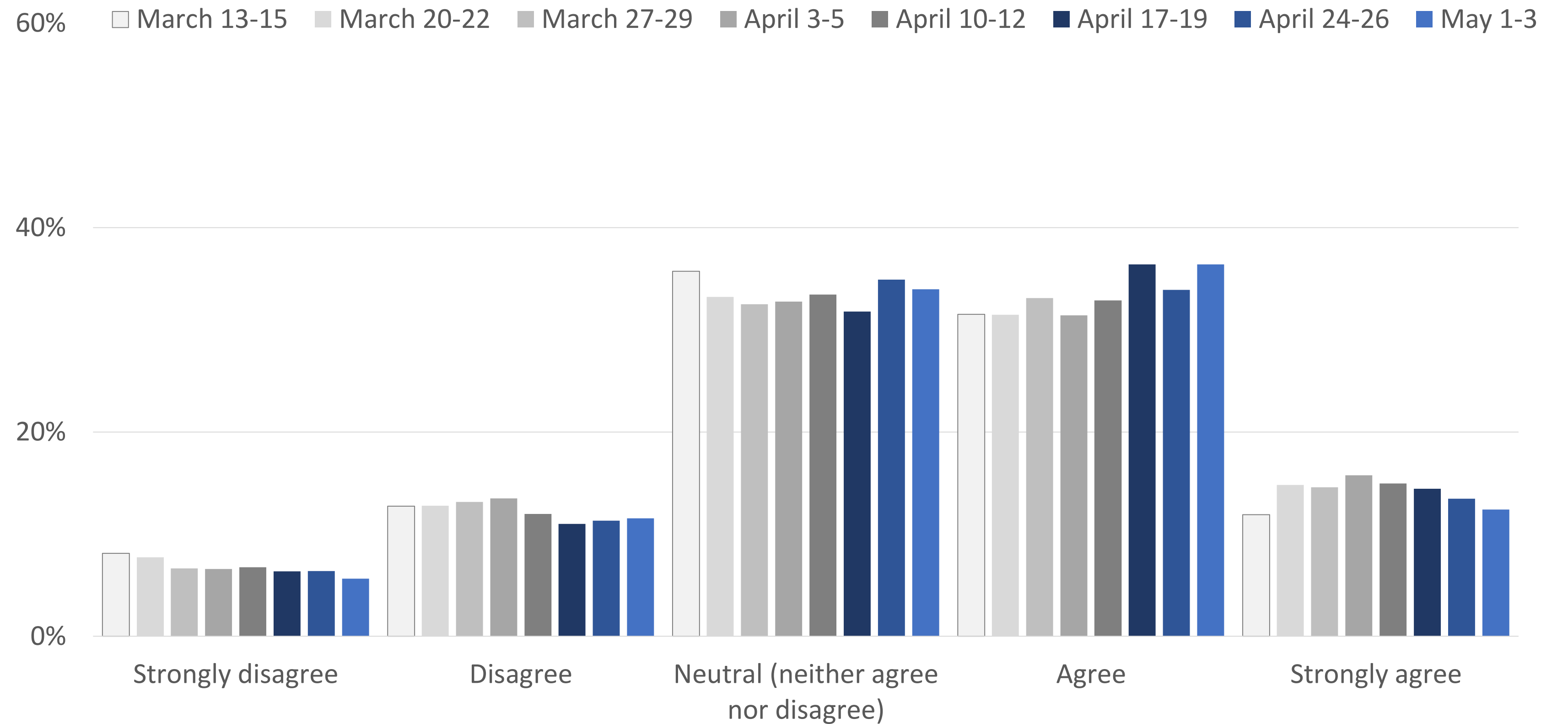
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19, 24-26, and May 1-3, 2020)

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, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)





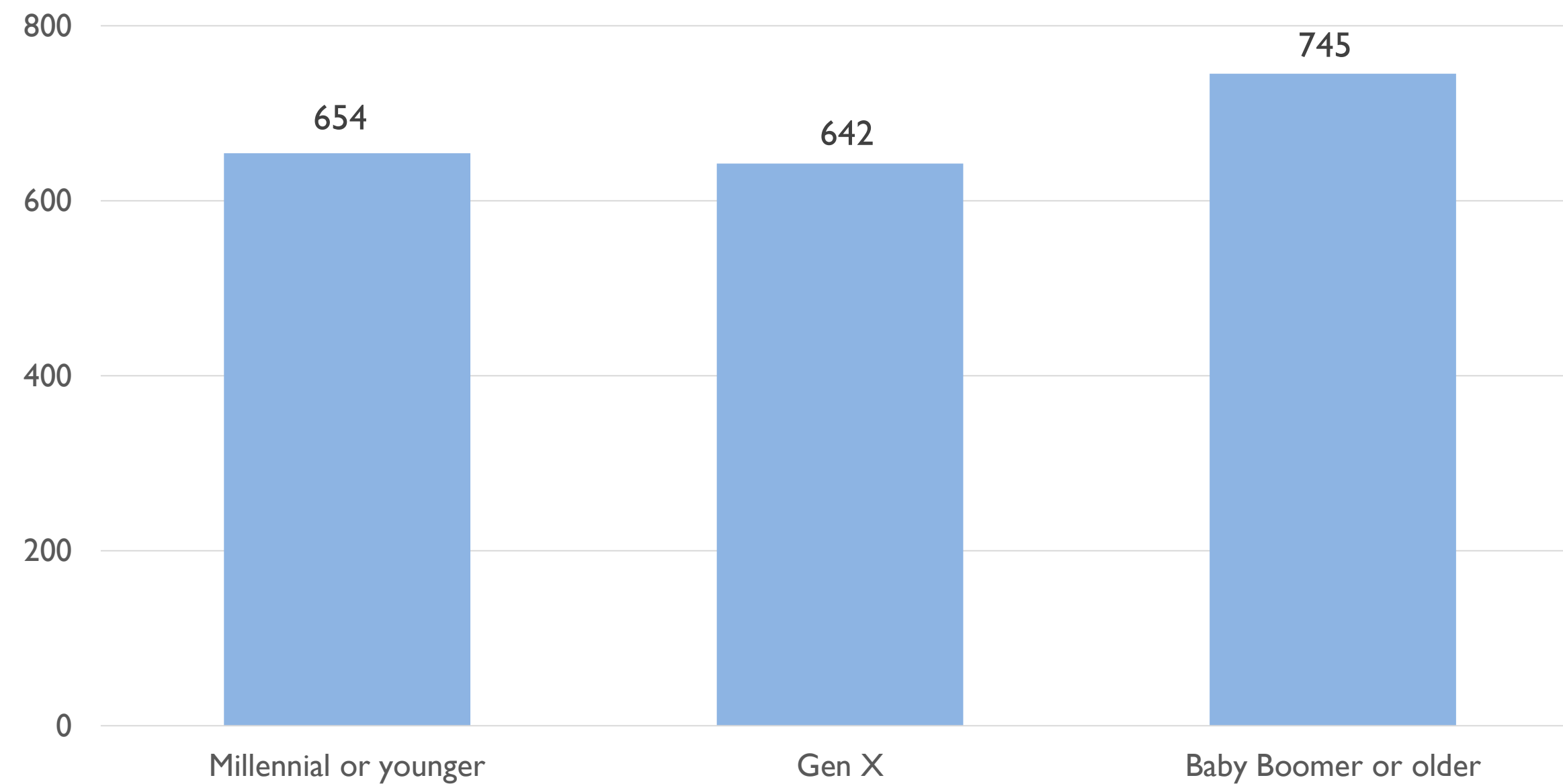
How Far Will You Travel on Your Next Leisure Trip?

686
miles

(average)

Distance of Next Leisure Trip

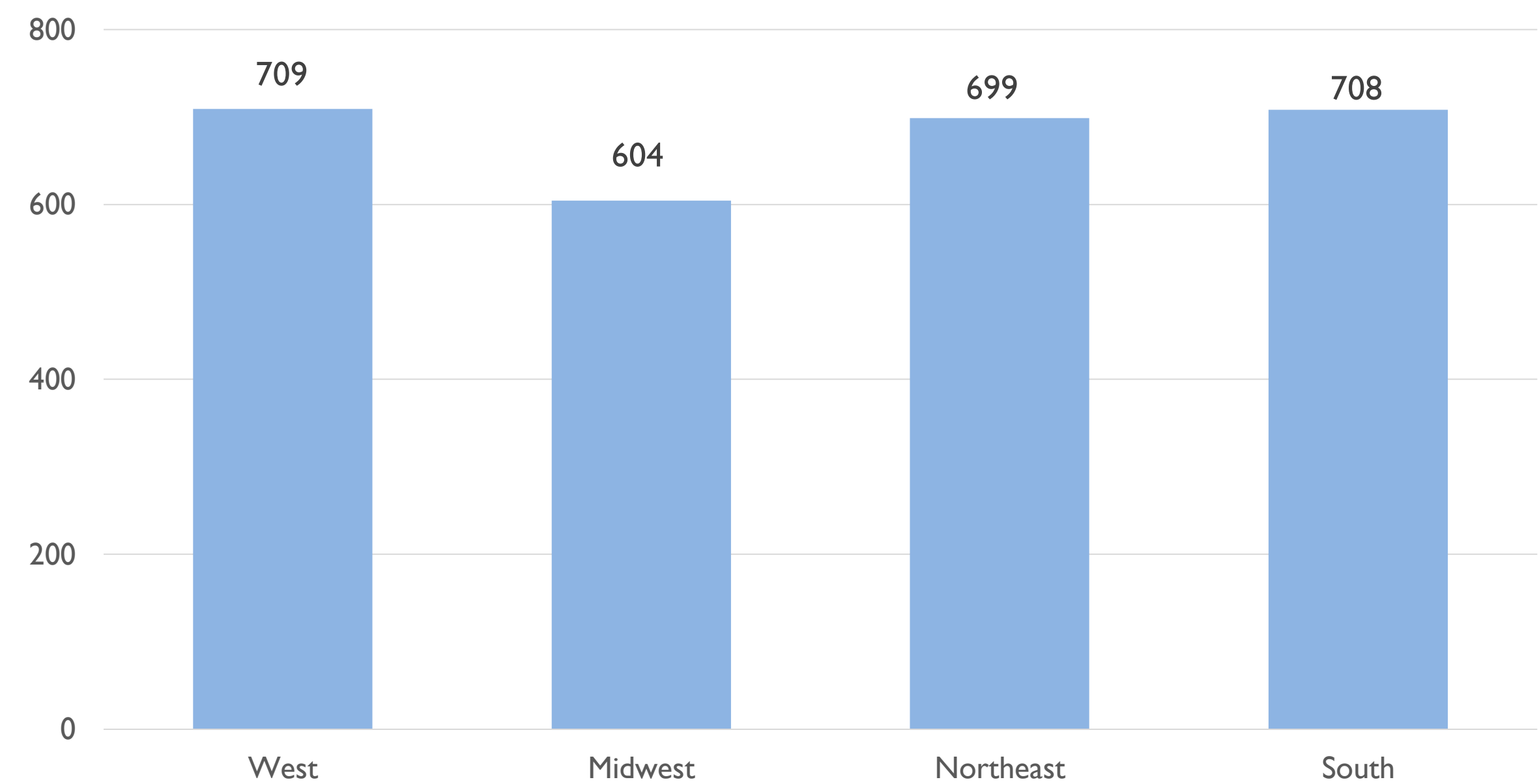
Average Distance of Next Leisure Trip—by Generation



Question: On your next leisure trip, how far away from home will be likely you travel?

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Average Distance of Next Leisure Trip—by U.S. Region



Question: On your next leisure trip, how far away from home will be likely you travel?

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

KEY TAKEAWAYS

- **Americans' current confidence about summer travel is relatively muted**
- **September now has the highest number of American travelers having at least tentative trip plans, with increases reported in November and December, as well**
- **When Americans take their next leisure trip, they will be traveling 686 miles on average. Affluent travelers, Baby Boomers and travelers in the West and South plan to travel even further**



The Reopening

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, handing a white paper shopping bag to a customer. The customer is a woman with her hair in a ponytail, wearing a light blue button-down shirt and a green face mask. They are in a shop with shelves of goods in the background. The text "The Reopening" is overlaid in white in the center.

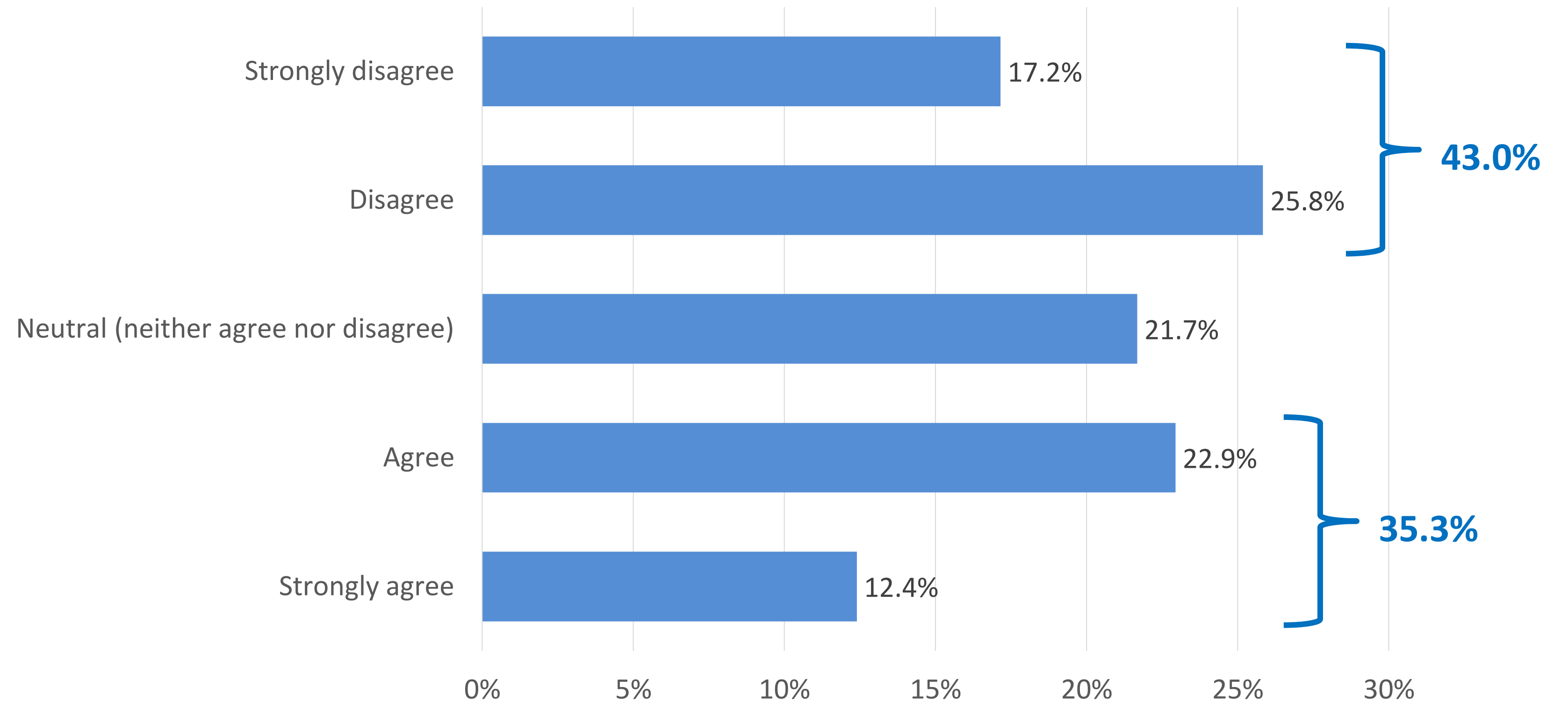
Comfort with Home State Re-Opening

How much do you agree with the following statement?

Statement: I am comfortable with my home state re-opening its economy right now.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

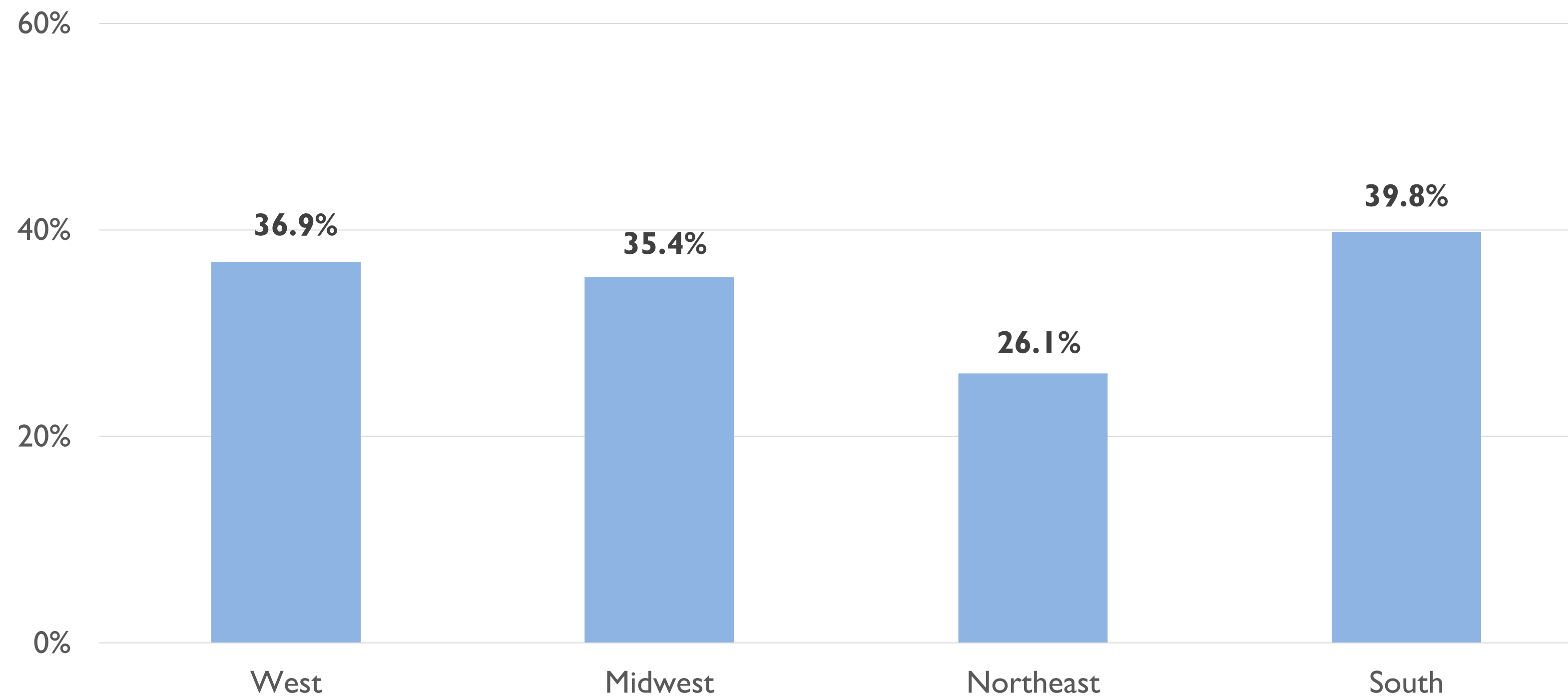
Question Added in Wave 8



Comfort with Home State Re-Opening

Americans Comfortable with Their Home State Re-Opening—by Region

(% of respondents in each region who “agree” or “strongly agree” with the statement “I am comfortable with my home state re-opening its economy right now.”)



Question: How much do you agree with the following statement?

Statement: I am comfortable with my home state re-opening its economy right now.

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

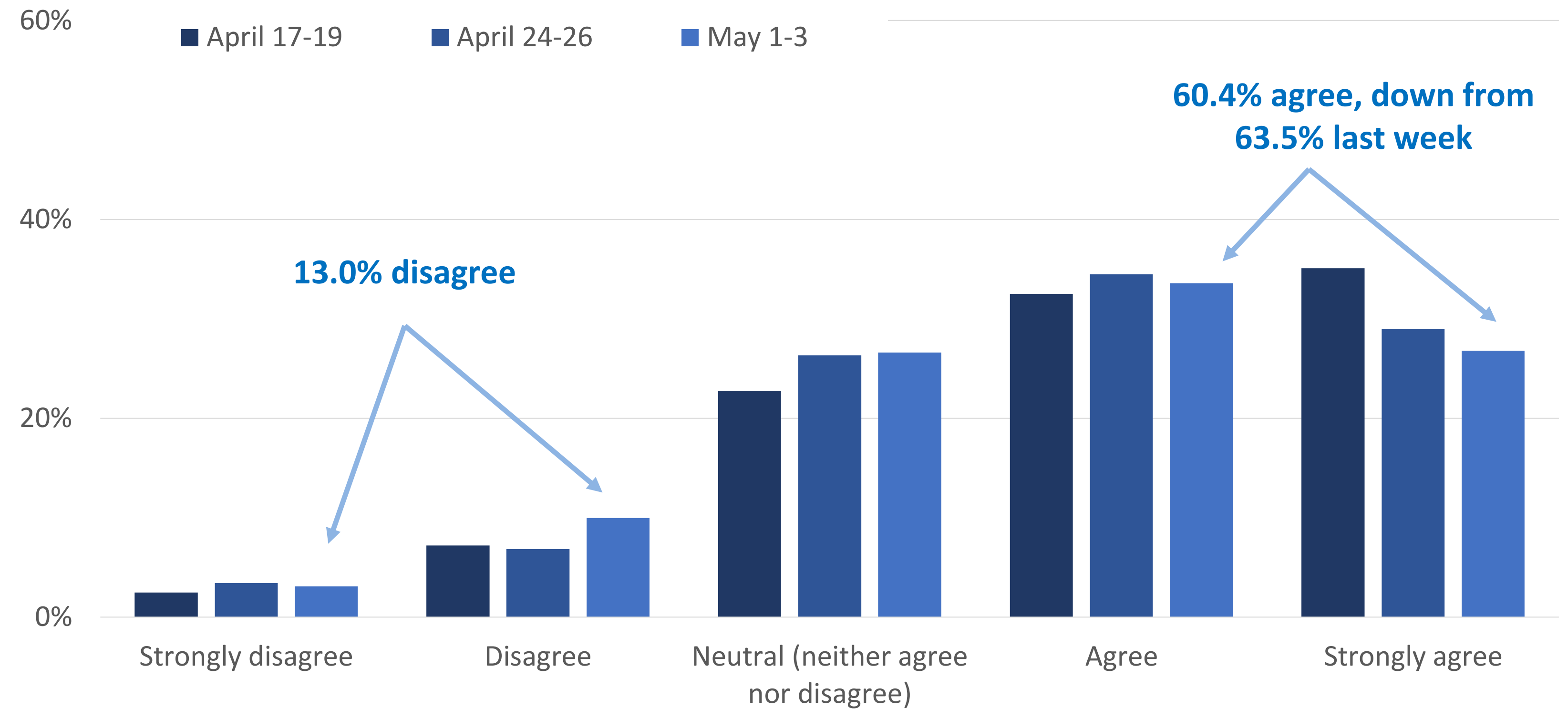
Feelings about Visitors to Community

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, 1,208 and 1,204 completed surveys. Data collected April 17-19, 24-26 and May 1-3, 2020)

Question Added in Wave 6

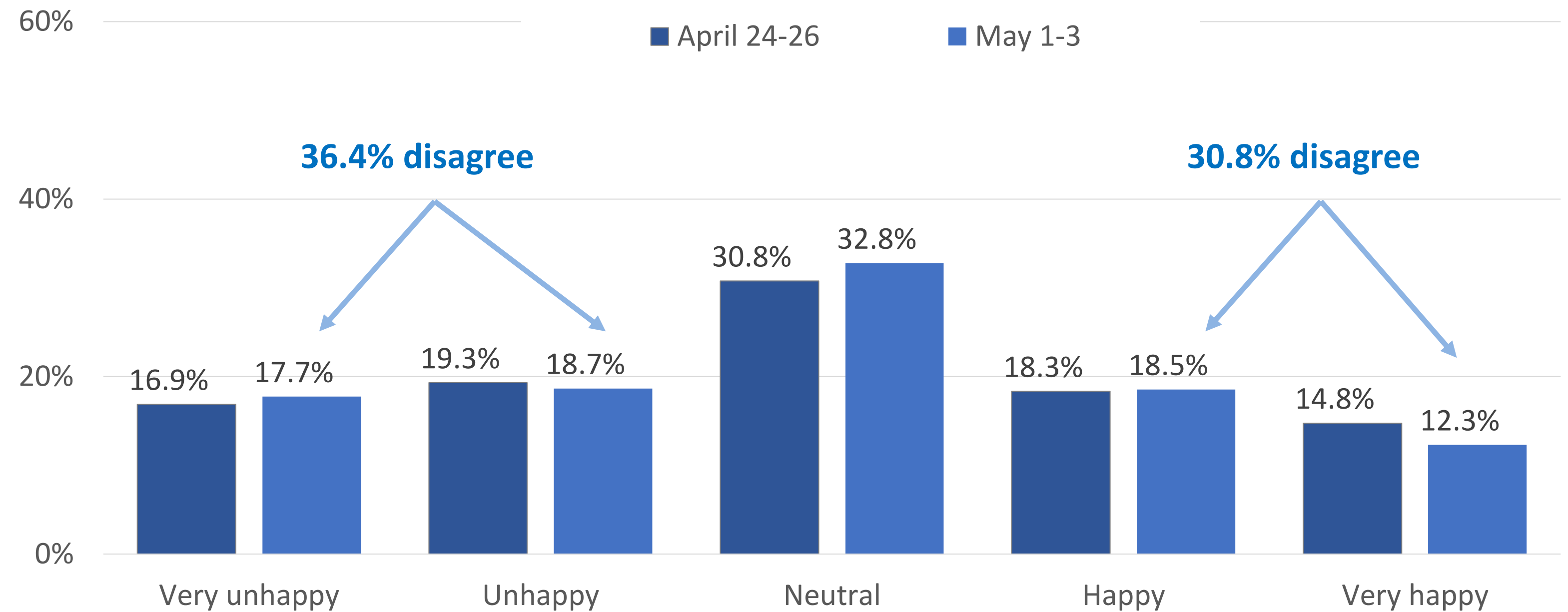


On Seeing Advertisements for Their Home Communities

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 and 1,204 completed surveys. Data collected April 24-26 and May 1-3, 2020)

Question Added in Wave 7



KEY TAKEAWAYS

- Many American travelers remain uncertain about the reopening
- Comfort levels are uneven across regions
- While the majority of American travelers still agree they don't want travelers in their community right now, this sentiment continues to decline





Coronavirus Travel Sentiment Index

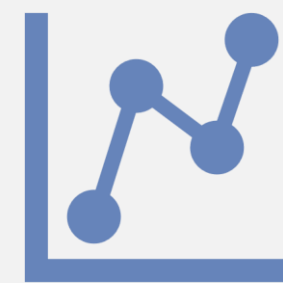
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 4th

What is a Predictive Index?



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



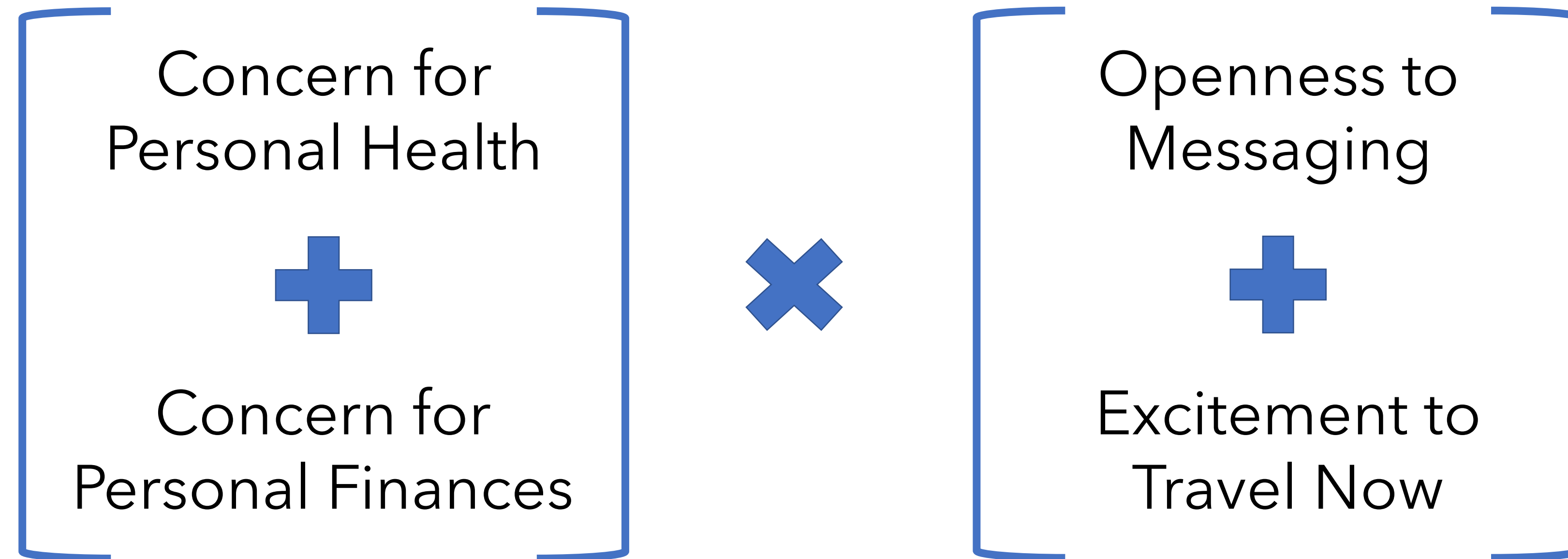
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

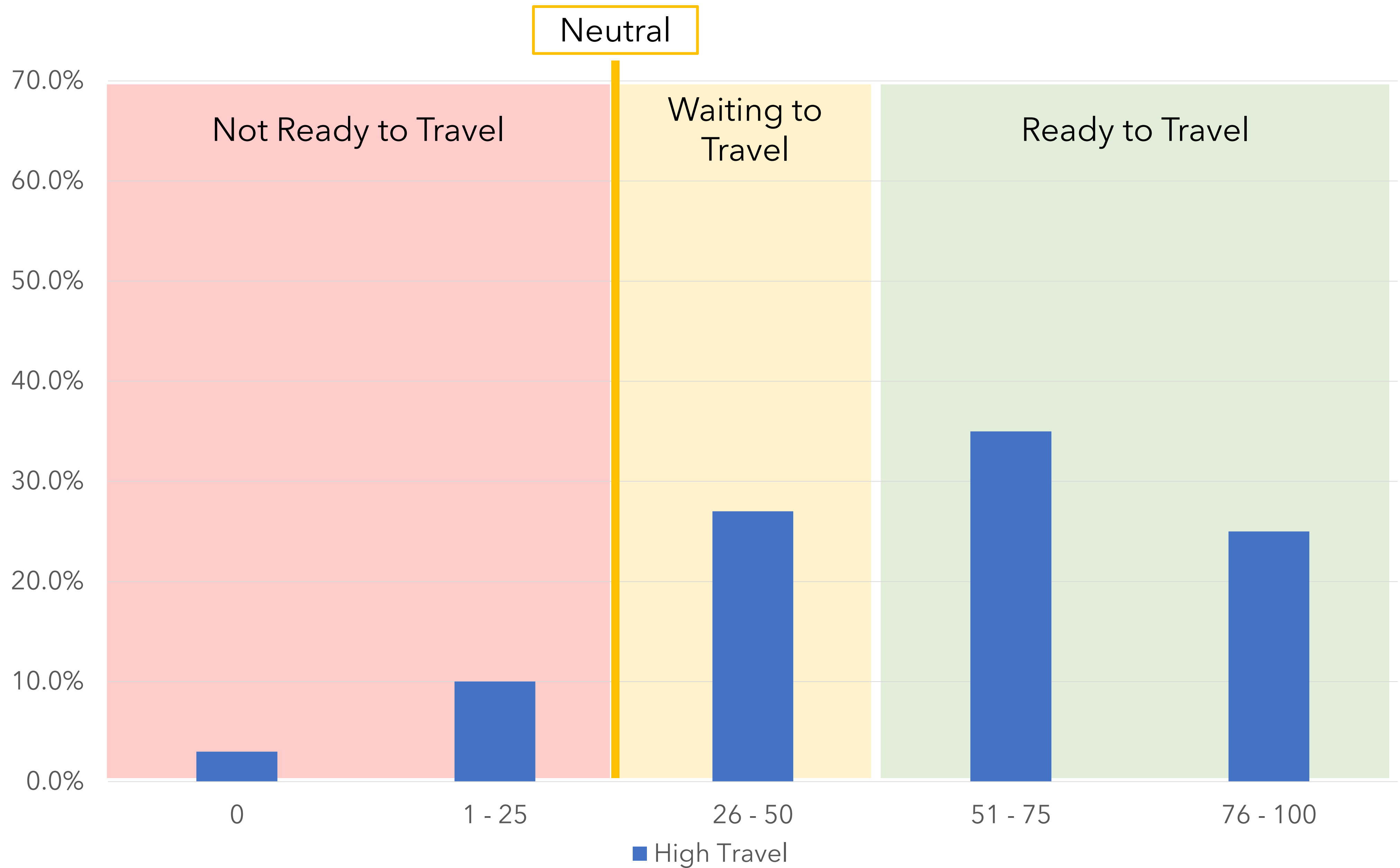
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

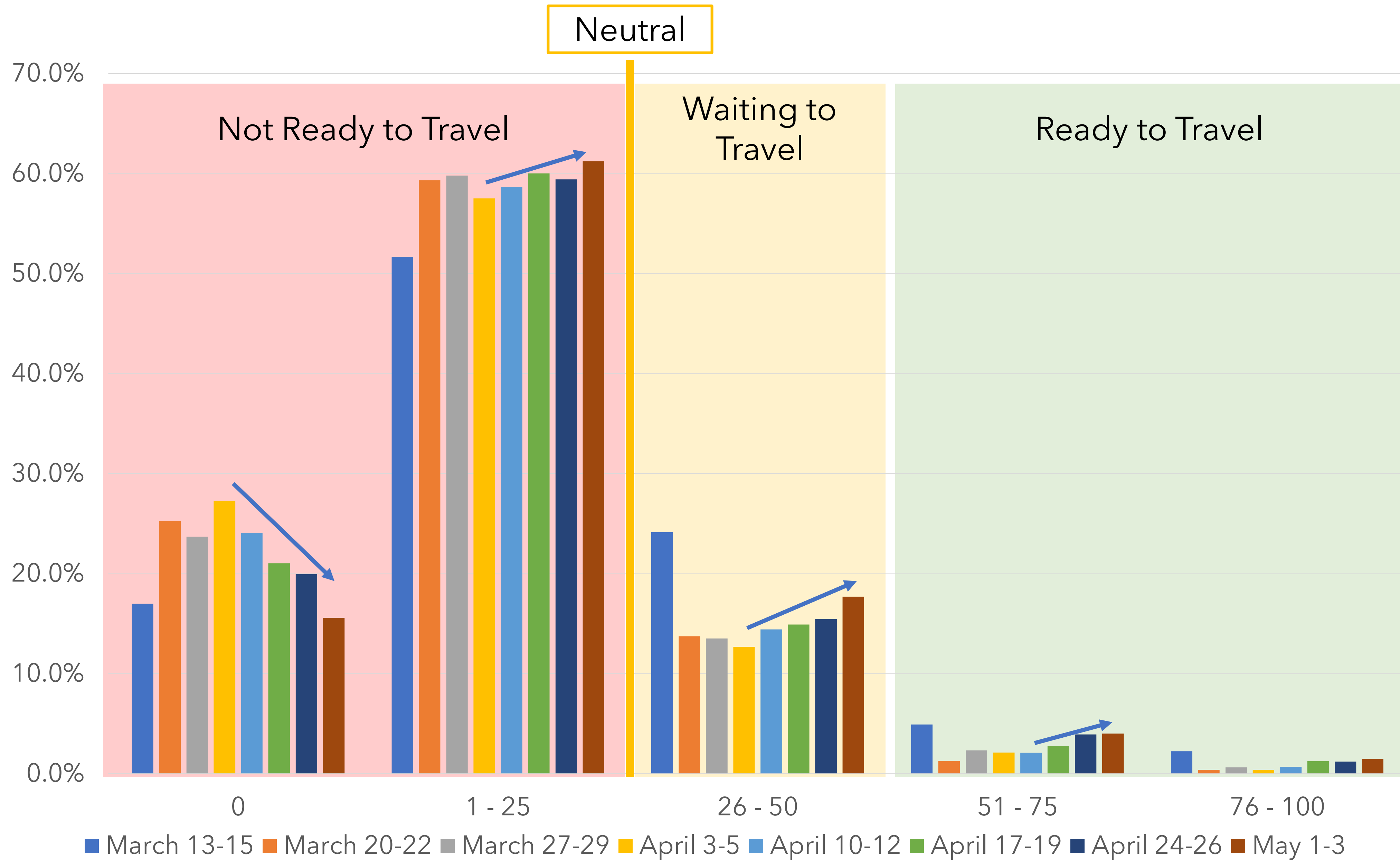


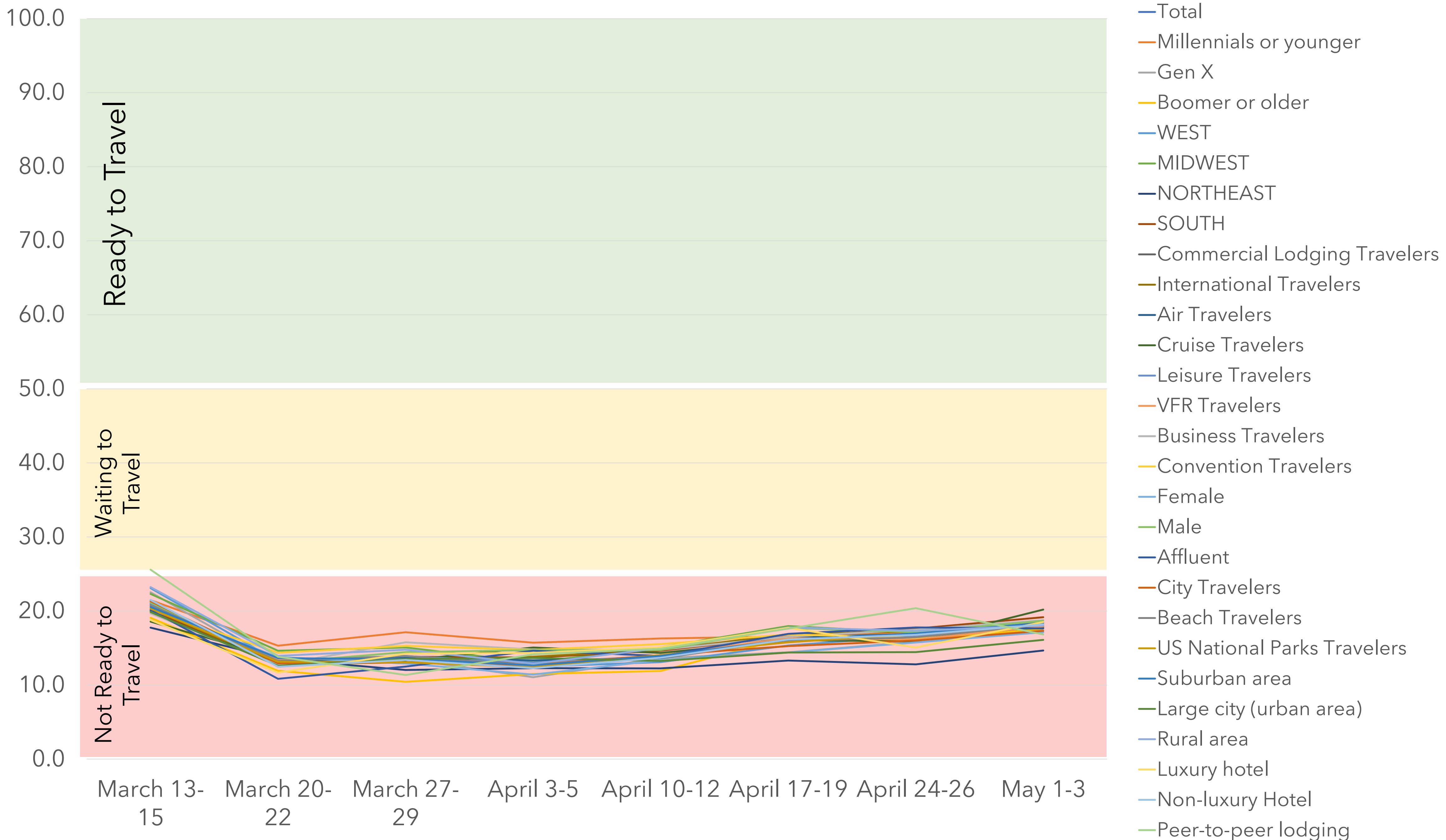
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook: Week of May 4th

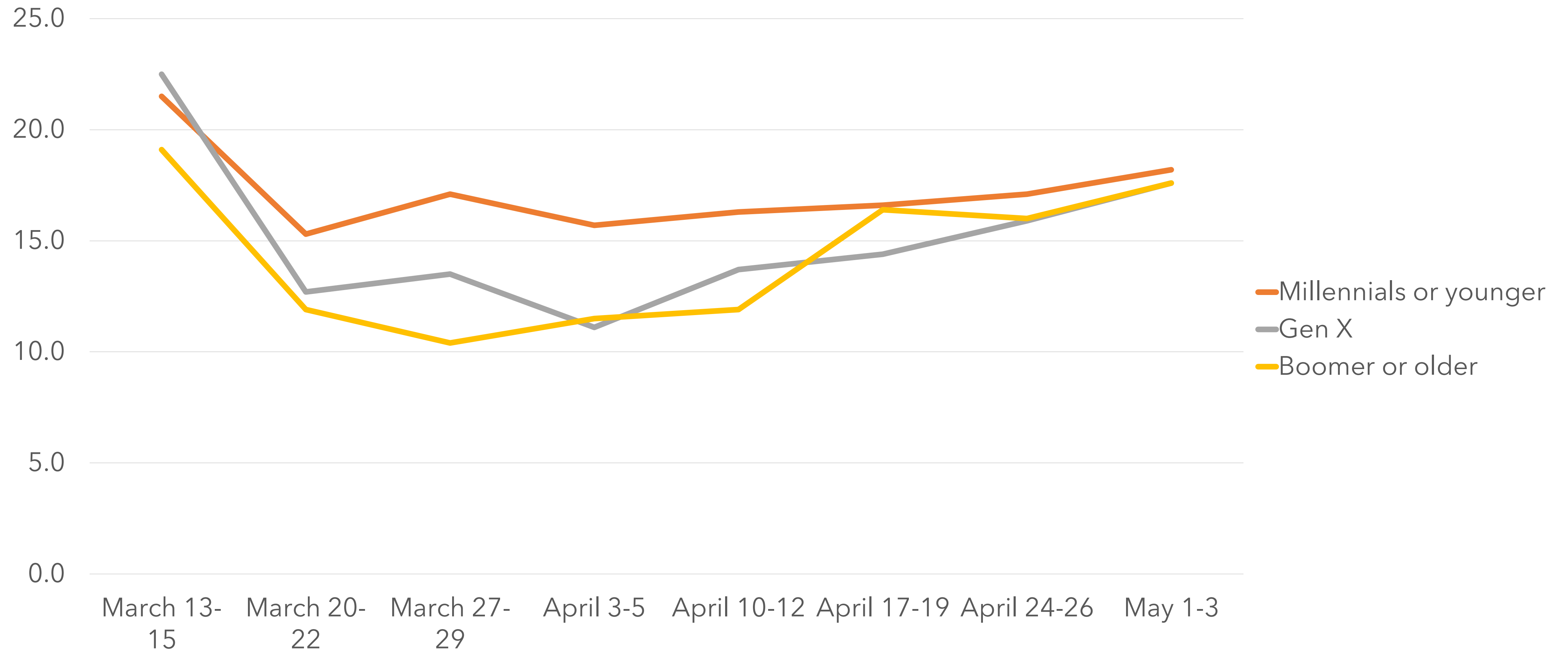




Generation

Points of Interest Impacting Index Scores:

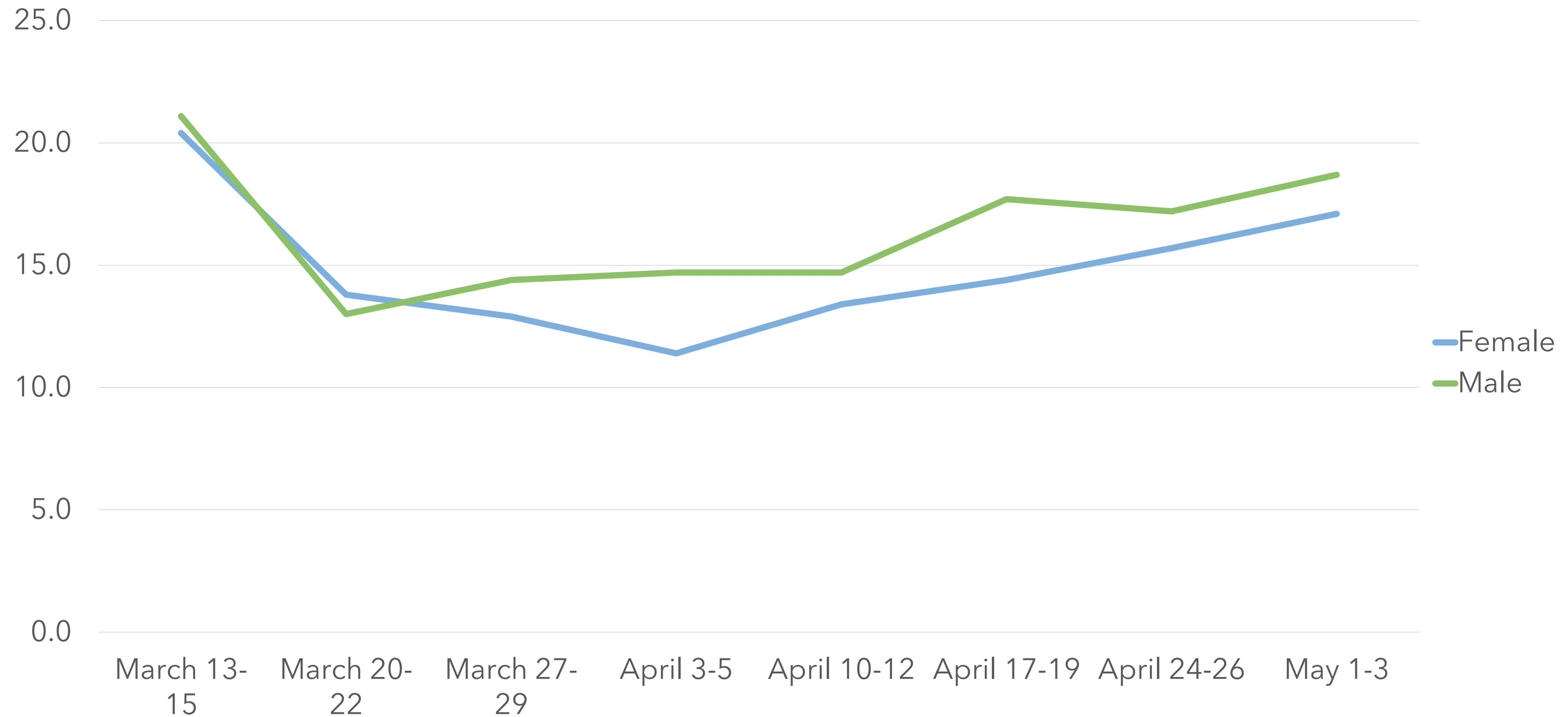
- All generations this week showed similar levels of concern for personally contracting the virus, a significant shift from the differences seen in previous weeks.
- Boomers this week continued to show the most concern for the national economy.
- Millennials are the first to show a decrease in travel affected by the virus week over week.



Gender

Points of Interest Impacting Index Scores:

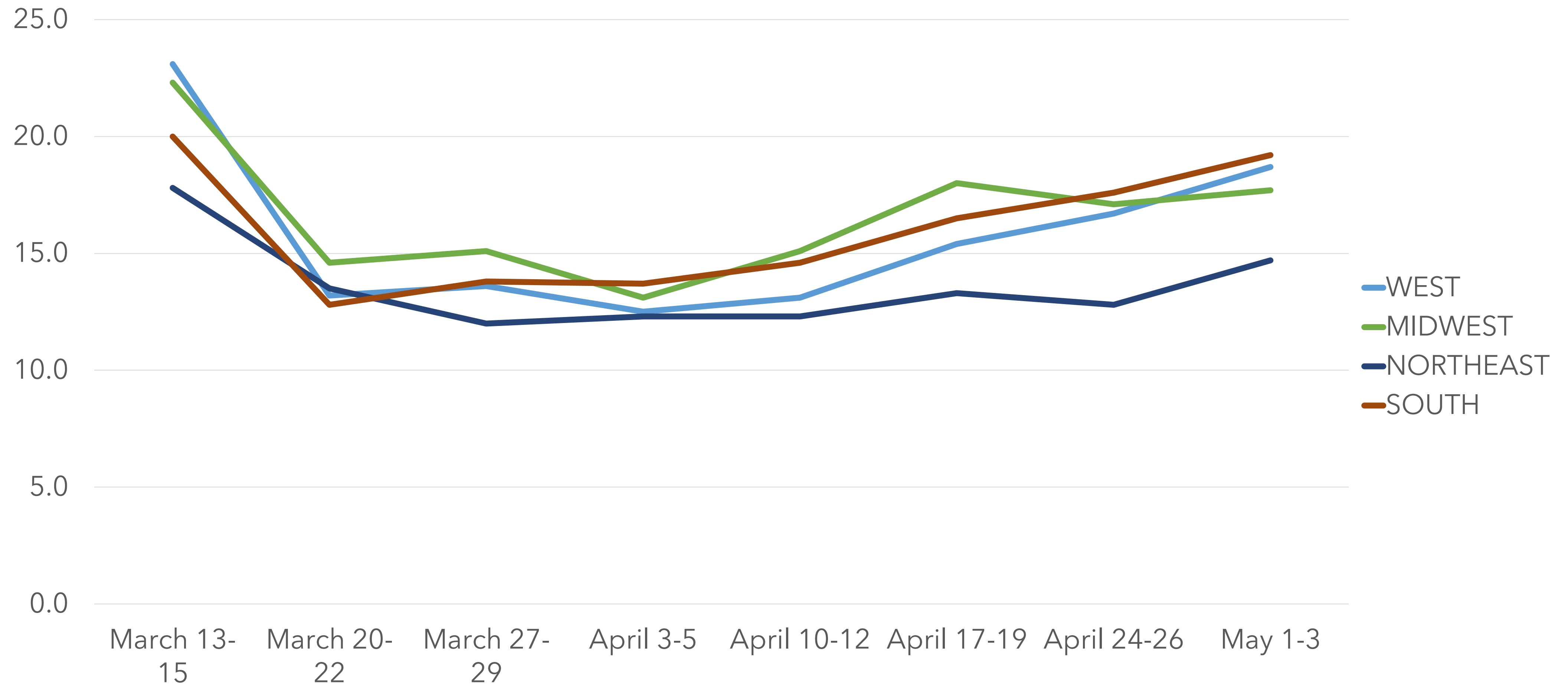
- Men and Women continued to report similar levels of both safety and financial concerns this week (previously women showing more concern)
- Men however continue to show more excitement to travel now and more openness to travel messaging
- Men more likely to say they are comfortable with their home state re-opening its economy right now (40.6% vs 30.9% for women)



US Region

Points of Interest Impacting Index Scores:

- Northeast continued to report the highest levels of personal concern for contracting the virus this week, consistently higher than other regions
- South showed highest expectation to being traveling again by Fall 2020 and continued to show the most openness for travel messaging this week
- Although Midwest continued to be the least optimistic, all regions showed an increase in optimism this week being more likely to say the Coronavirus situation will get better or much better in the next month



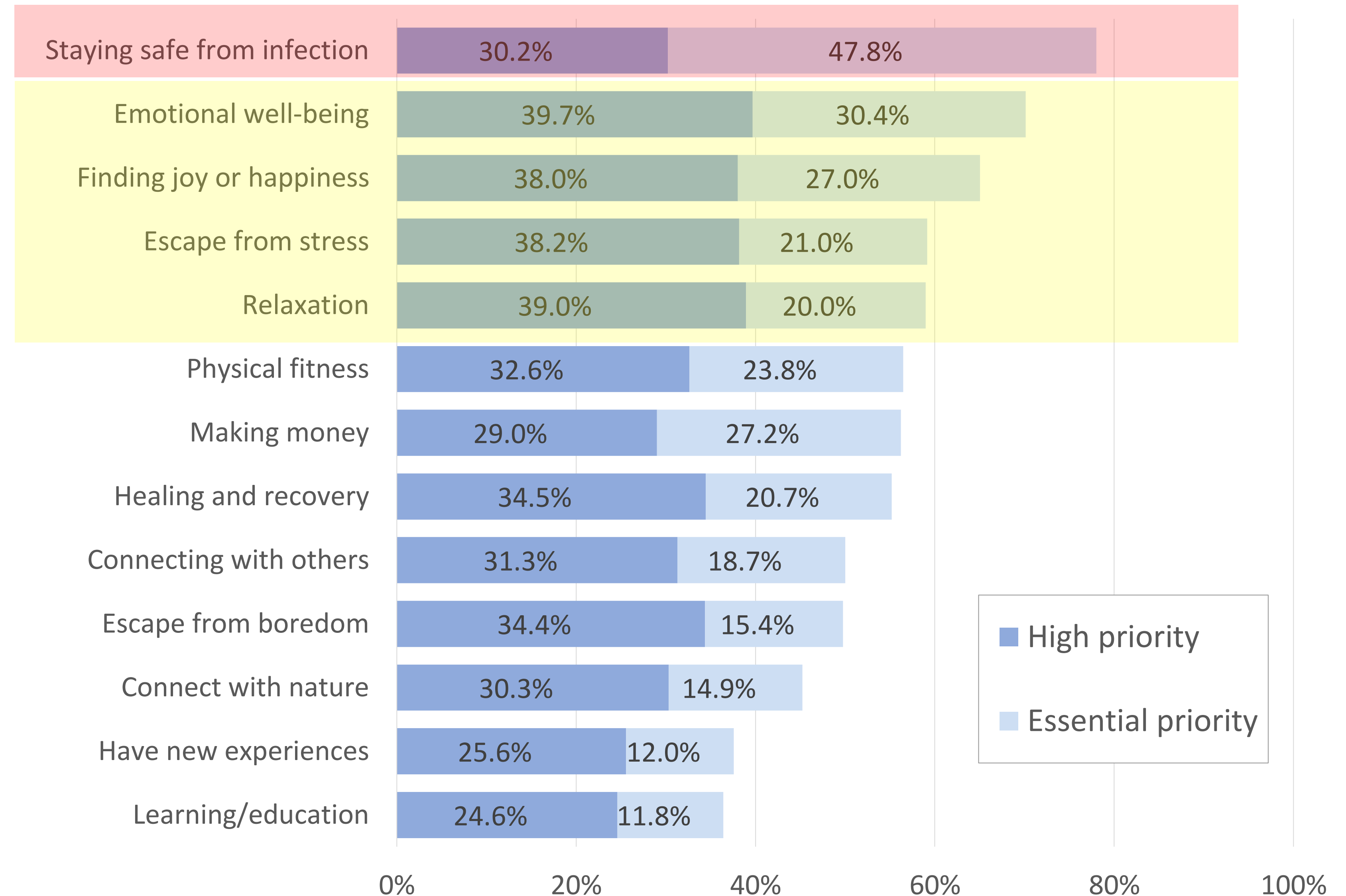


Traveler Priorities

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)



In the period after coronavirus, how are you going to approach getting back into travel?



47.0%

I'll get back in but carefully



39.9%

I'll test the waters first



13.1%

I'll jump right back in

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





Released This Week



Upcoming for You

- Meeting Planner Sentiment Survey Findings
- Online Focus Groups with Travelers
- Focus on Segments

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

Send suggestions or requests for questions to:

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