



Coronavirus Travel Sentiment Index

Presentation of Findings
Week of June 29th

Destination  Analysts



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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.

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<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

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**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars

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

Send suggestions or requests for questions to:

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



IMPORTANT

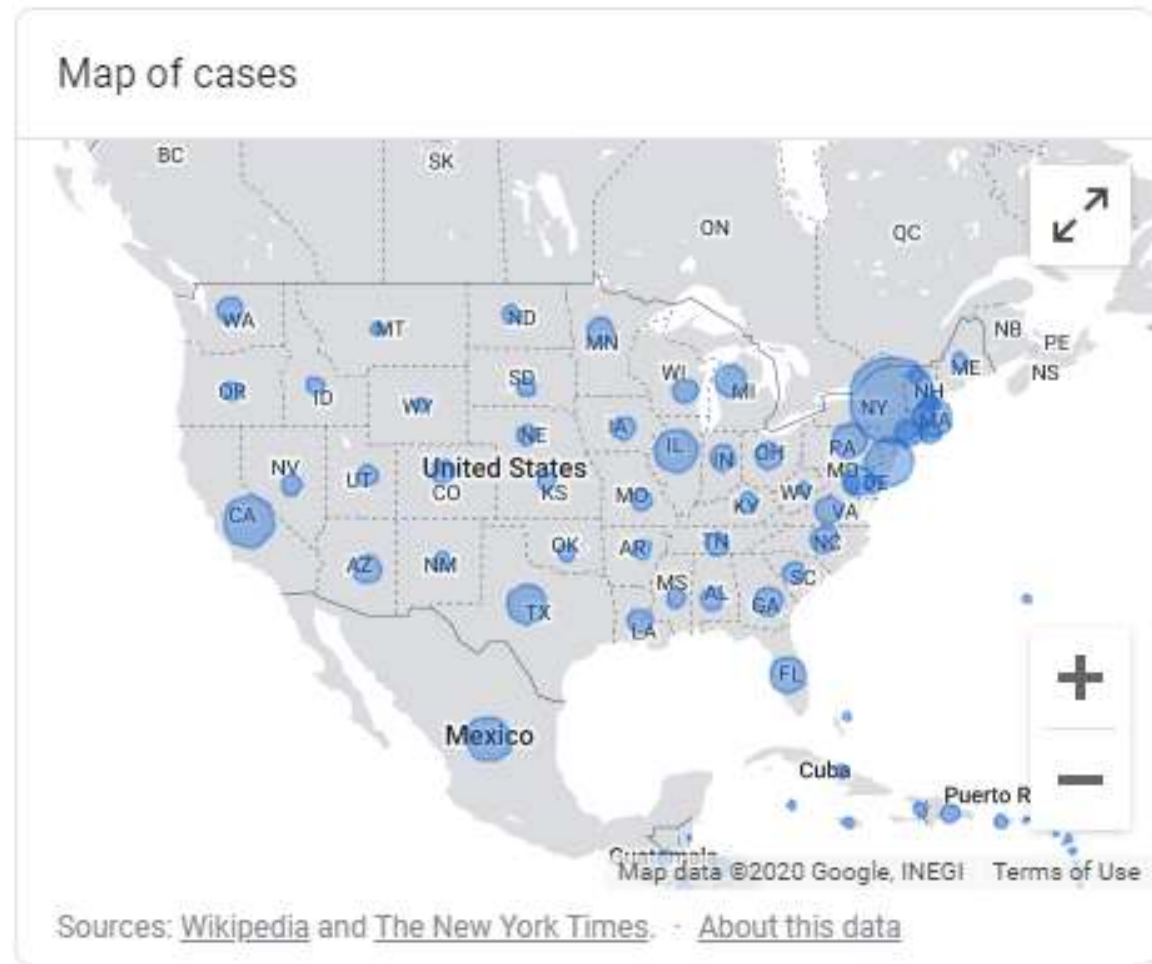
The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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 16 data (fielded June 26-28) 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**

U.S. Regions





US & Canada

Coronavirus: Florida and Texas reverse reopening as US cases pass 2.5m

4 hours ago

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Coronavirus pandemic



Coronavirus infections across the United States have passed 2.5 million, with record numbers of cases reported in the states of Florida and Texas.

The surge in cases in southern states comes after businesses were allowed to re-open in recent weeks.

On Saturday, Florida reported more than 9,500 new cases, up from almost 9,000 on Friday, the previous record.

The spike has led state officials to tighten restrictions on business again - as Texas also did on Friday.

The leading US government adviser on coronavirus, Dr Anthony Fauci, said last week that the country had a "serious problem".

More than 125,000 Covid-19 patients have died nationwide - more than in any other country.

CORONAVIRUS LATEST State Health Dept. Investigating Possible COVID-19 Outbreak In Westchester County After High School Graduation Ceremony

CBS New York NEWS WEATHER SPORTS VIDEO BEST OF MORE

Coronavirus Travel Advisory Goes Into Effect In N.Y., N.J., Conn.; Massive Fines Possible For Quarantine Non-Compliance

June 25, 2020 at 1:10 pm Filed Under: Connecticut, Coronavirus, COVID-19, John D'Amico, Local TV, New Jersey, New York, Travel Advisory

CORONAVIRUS LIVE UPDATES

Q&A: Are Face Mask Requirements Legal?

June 28, 2020 · 7:59 AM ET
Heard on Weekend Edition Sunday

LULU GARCIA-NAVARRO [f](#) [🐦](#) [📺](#)



The governor of Texas is encouraging people to wear masks in public and stay home if possible, as the number of COVID-19 cases spike in the state.

[AP Photo](#)

Current Feelings about the Pandemic and Travel

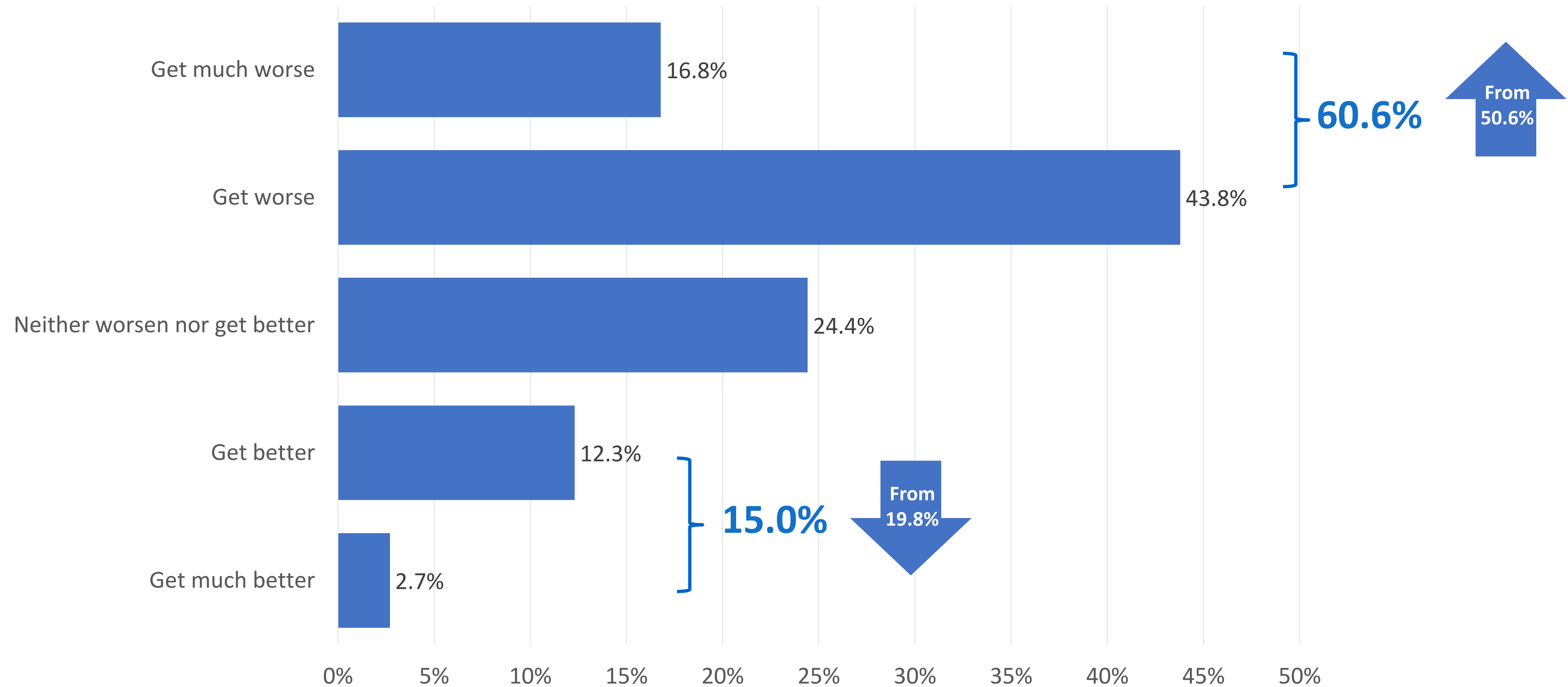


Question: In the NEXT MONTH, how
(if at all) do you expect the severity of
the coronavirus situation in the
United States to change?

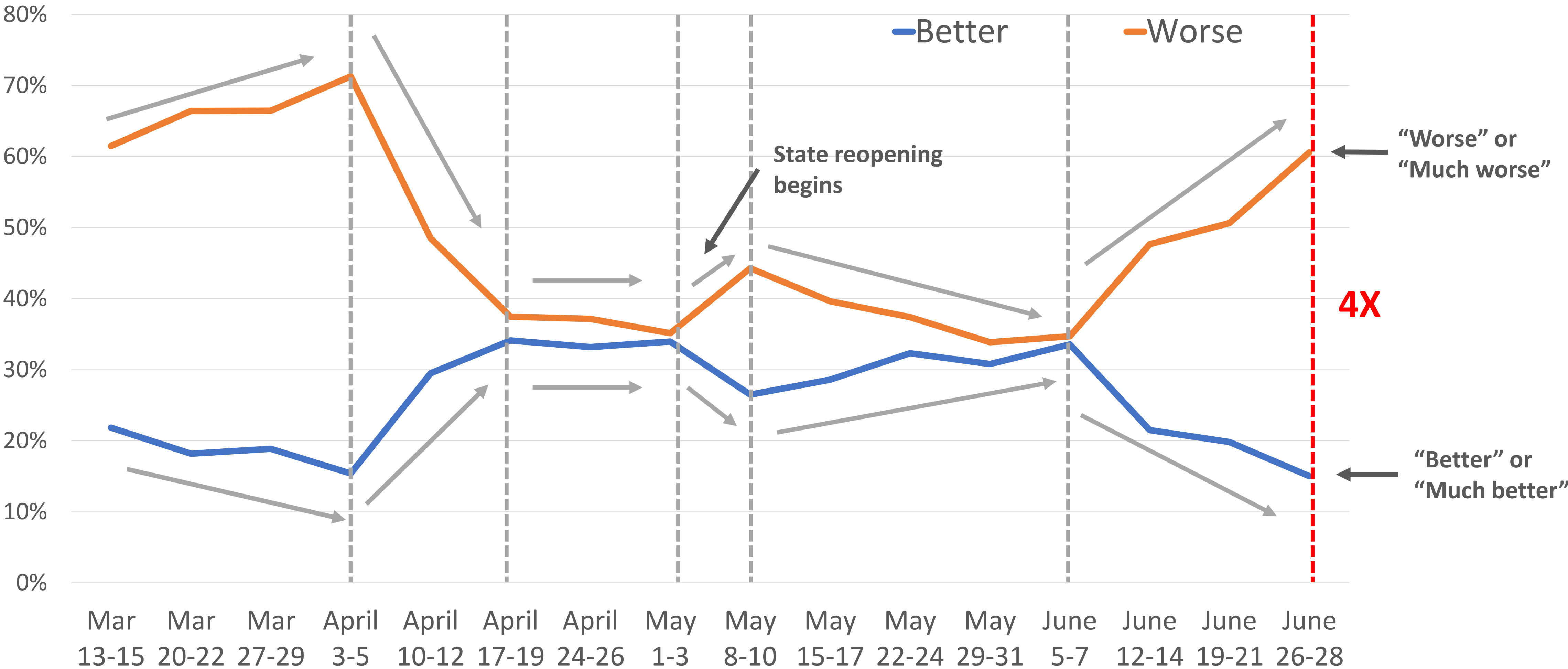
In the next month the coronavirus
situation will _____



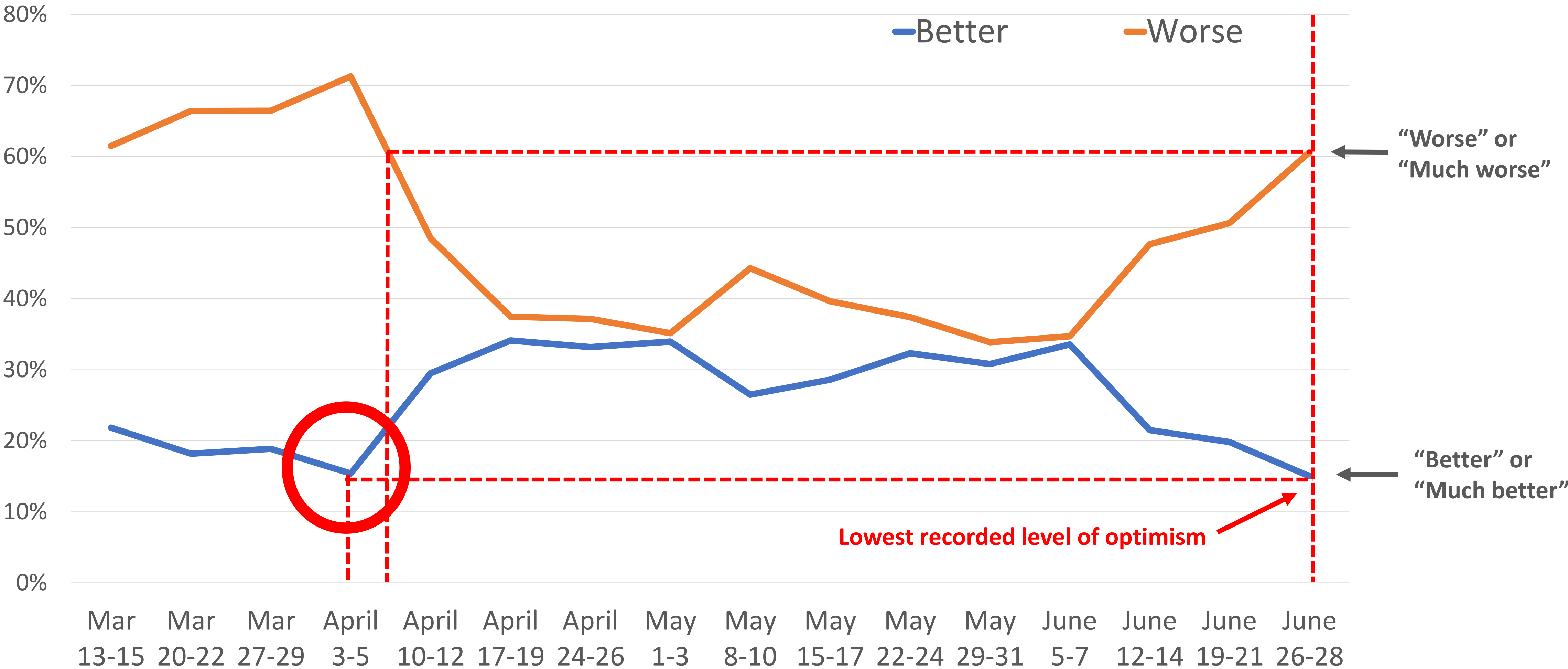
Expectations for the Coronavirus Outbreak



Expectations for the Coronavirus Outbreak



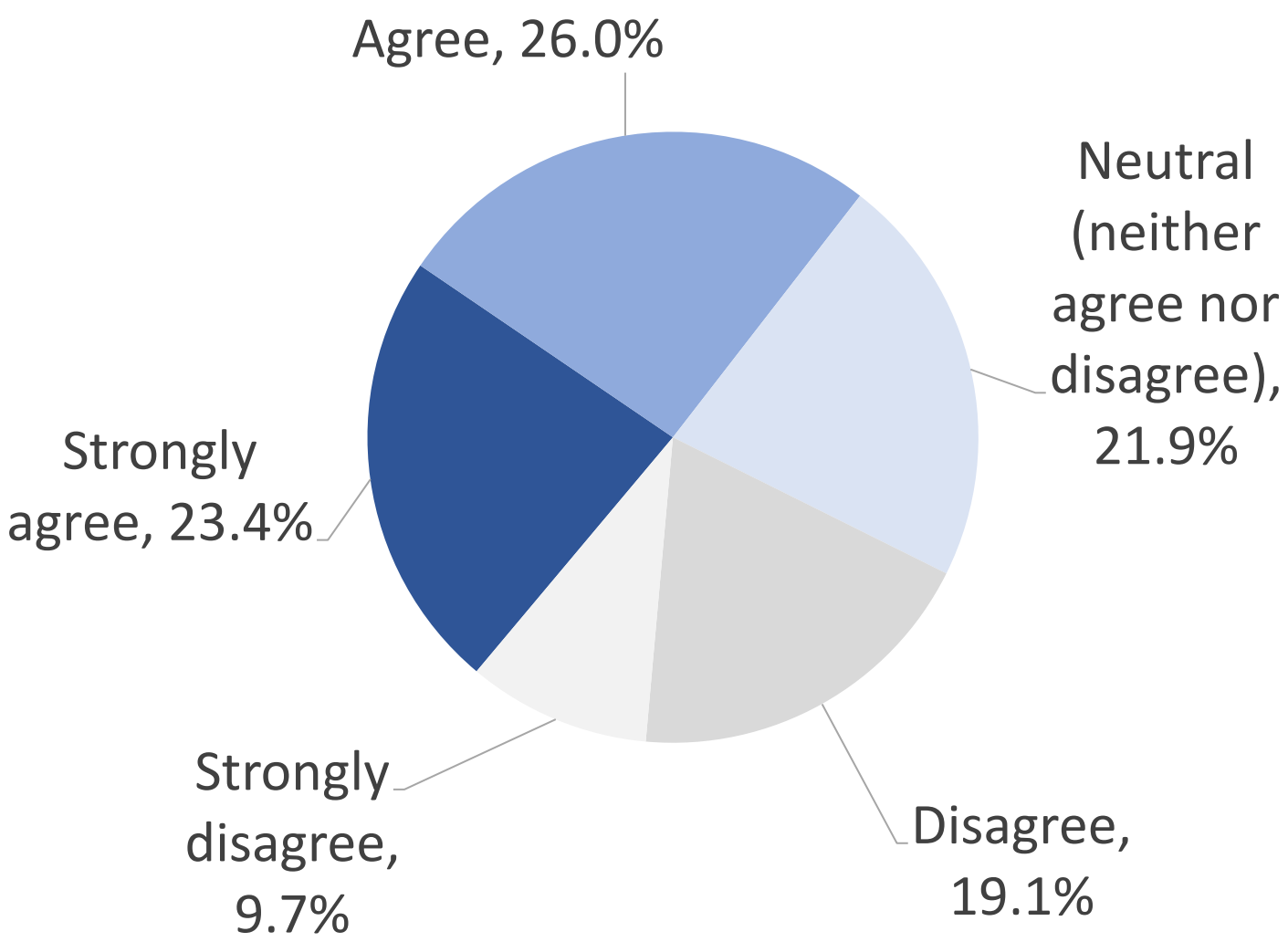
Expectations for the Coronavirus Outbreak



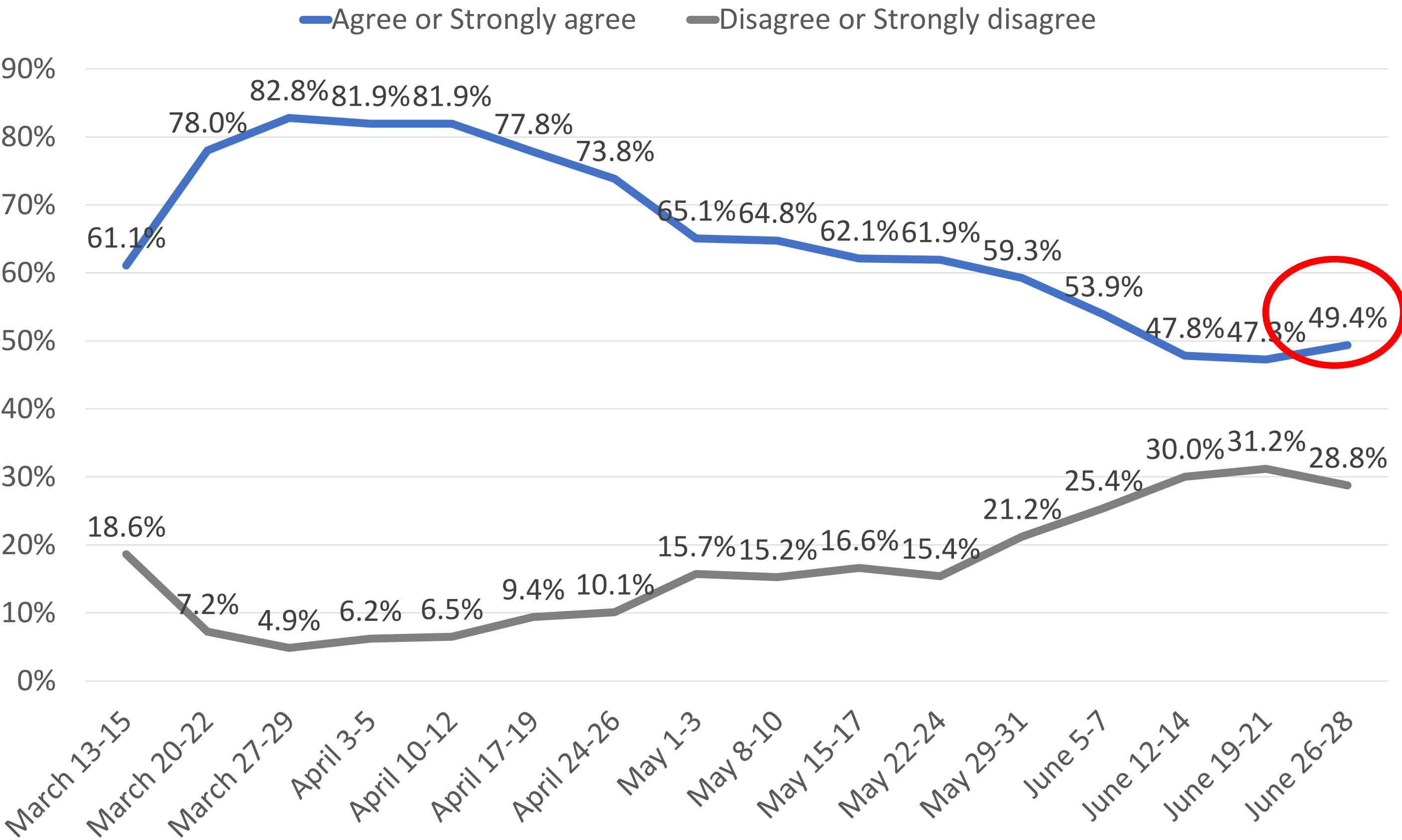
Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

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



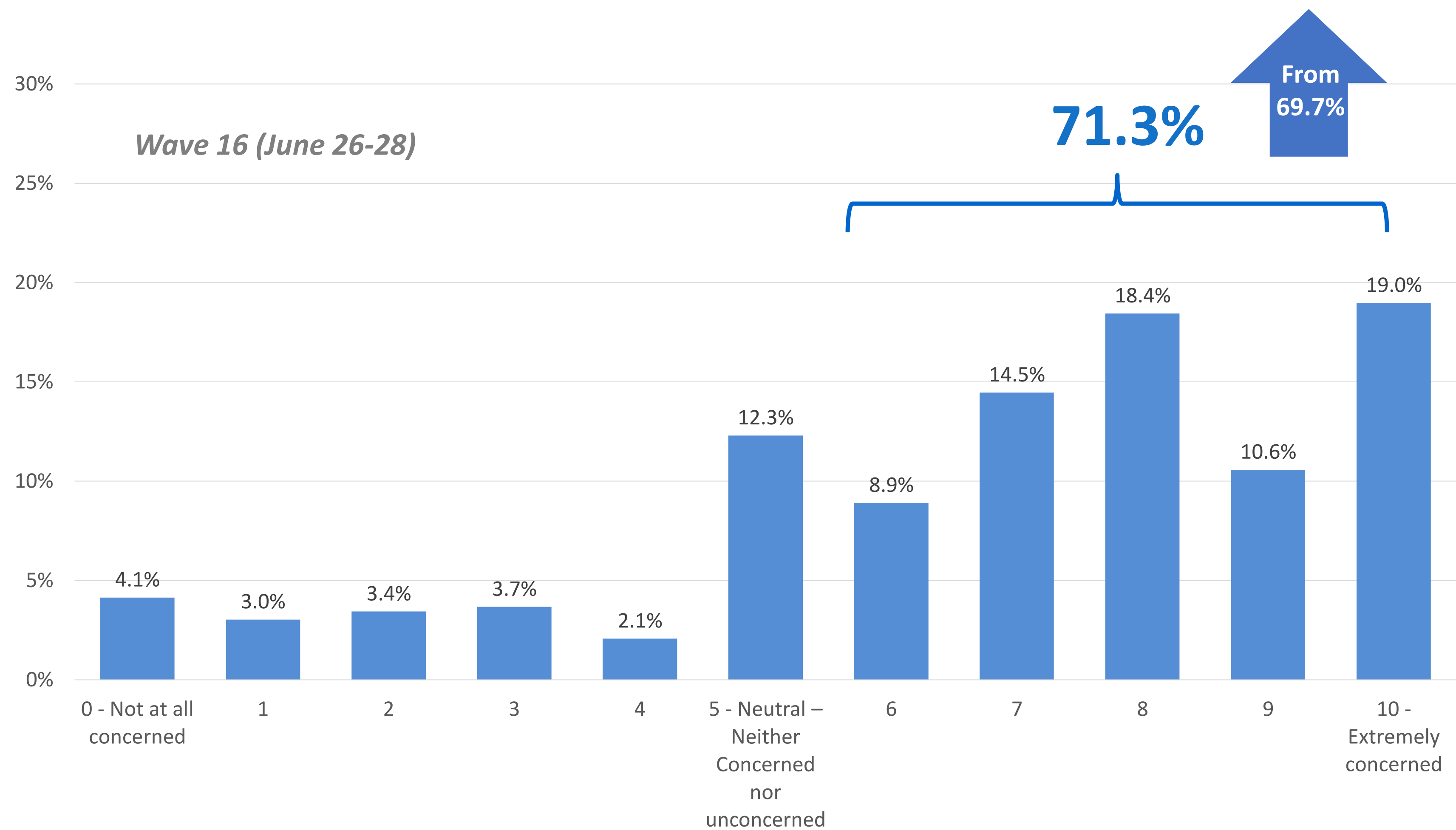
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28, 2020)



Personal Health Concerns

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

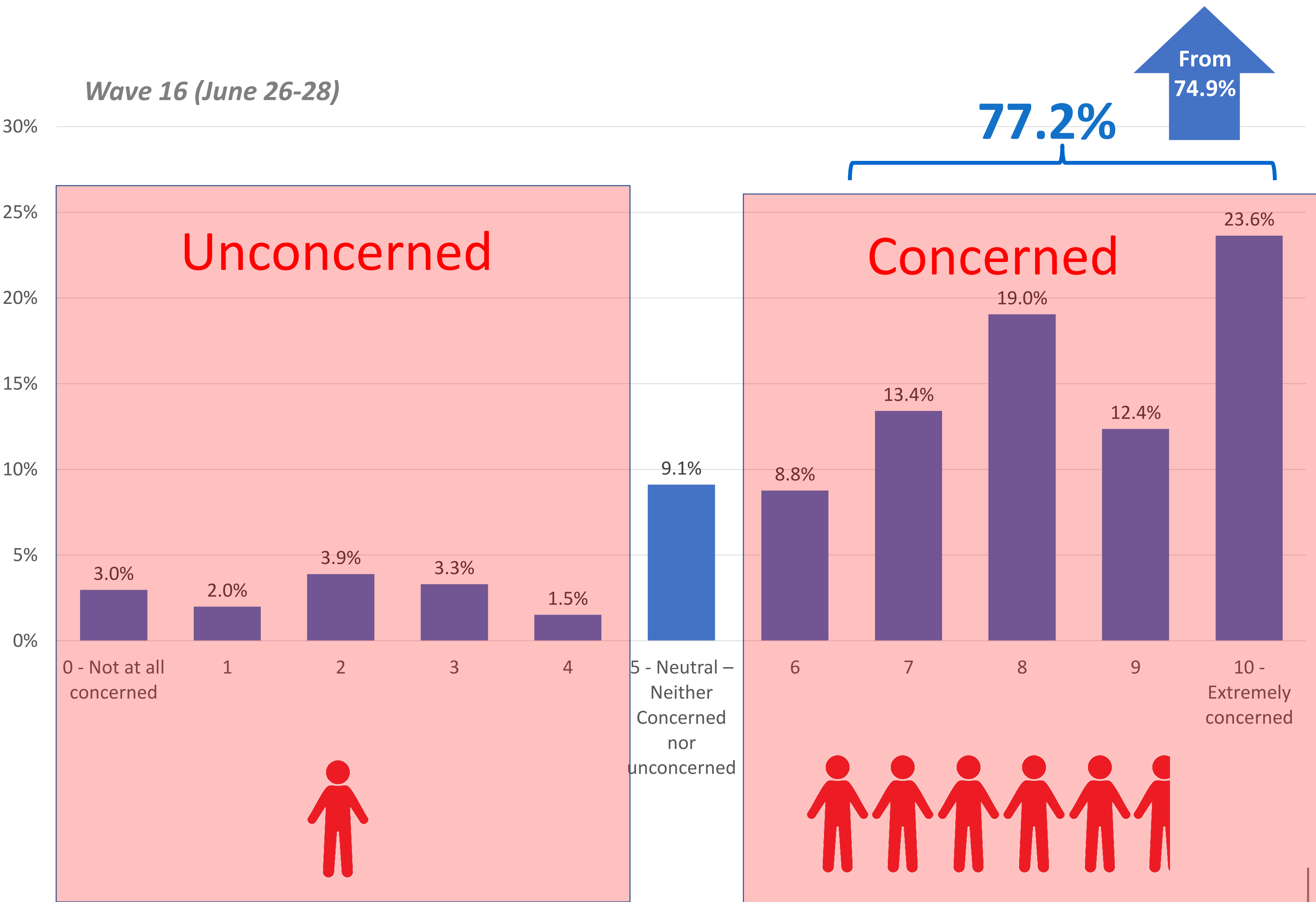
(Base: Wave 16 data. All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Health Concerns (Family & Friends)

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)

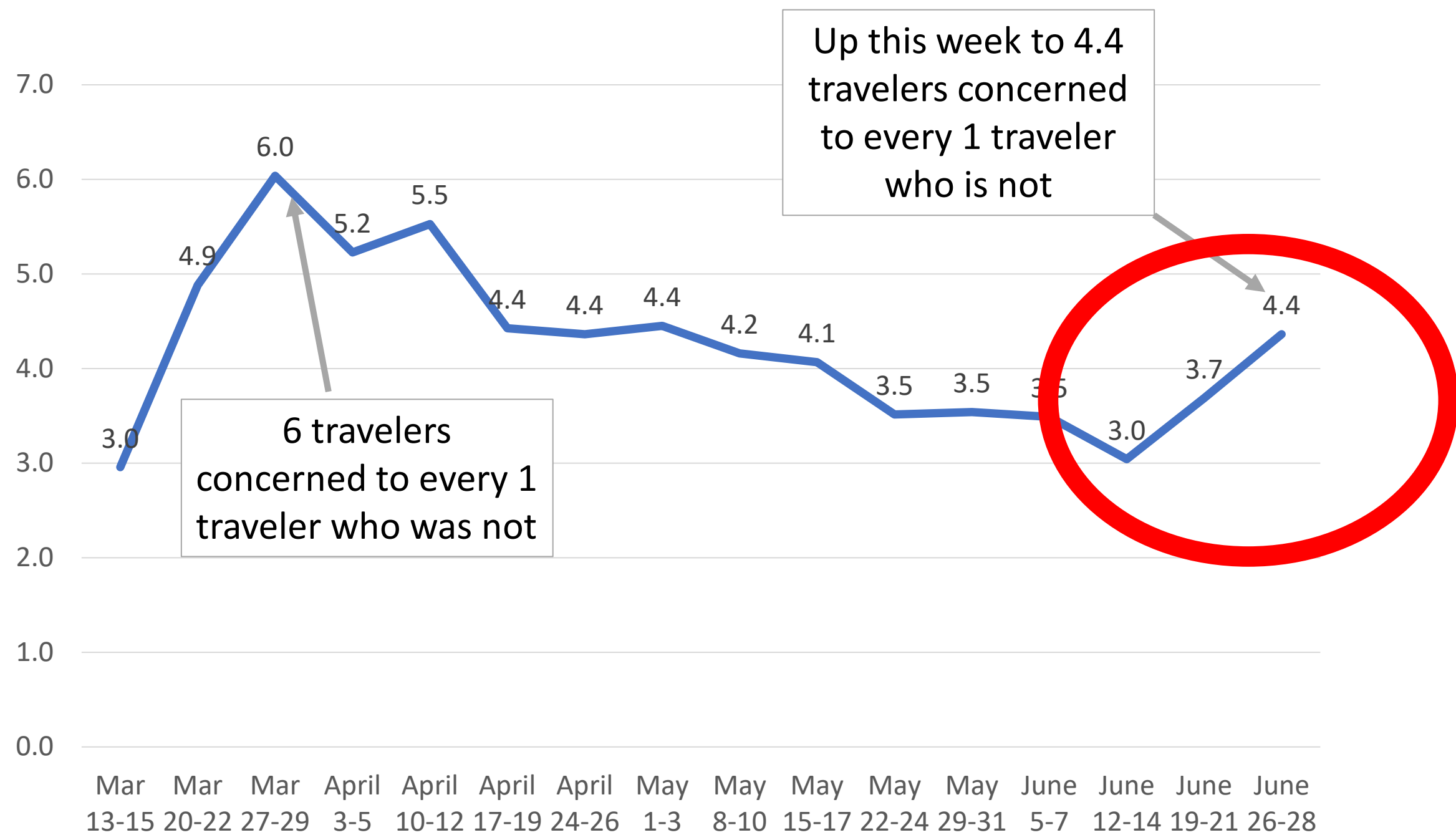
(Base: Wave 16 data. All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Ratio of Concerned to Unconcerned Travelers: Safety

Personal Safety

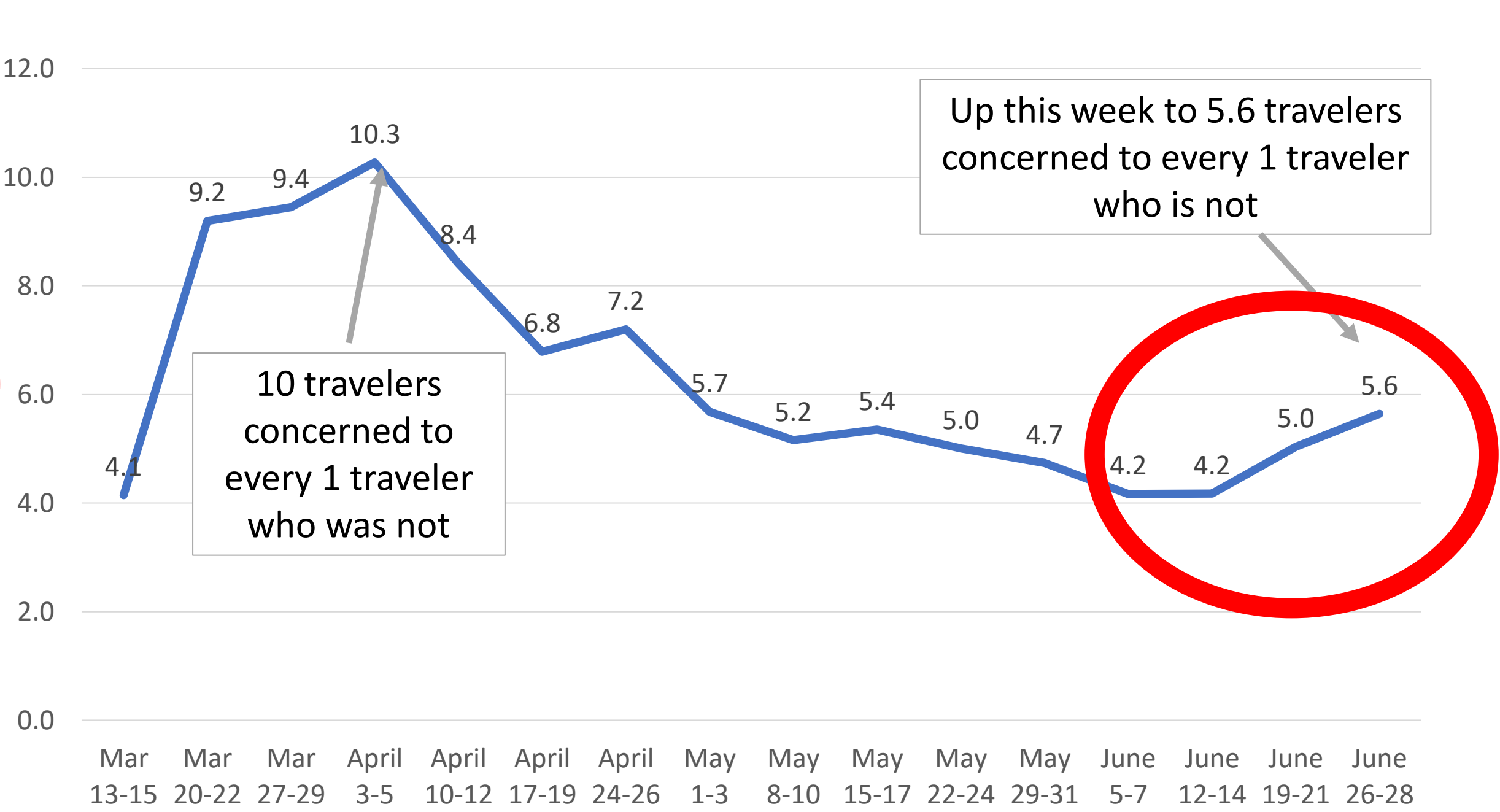
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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

Safety of Friends and Relatives

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

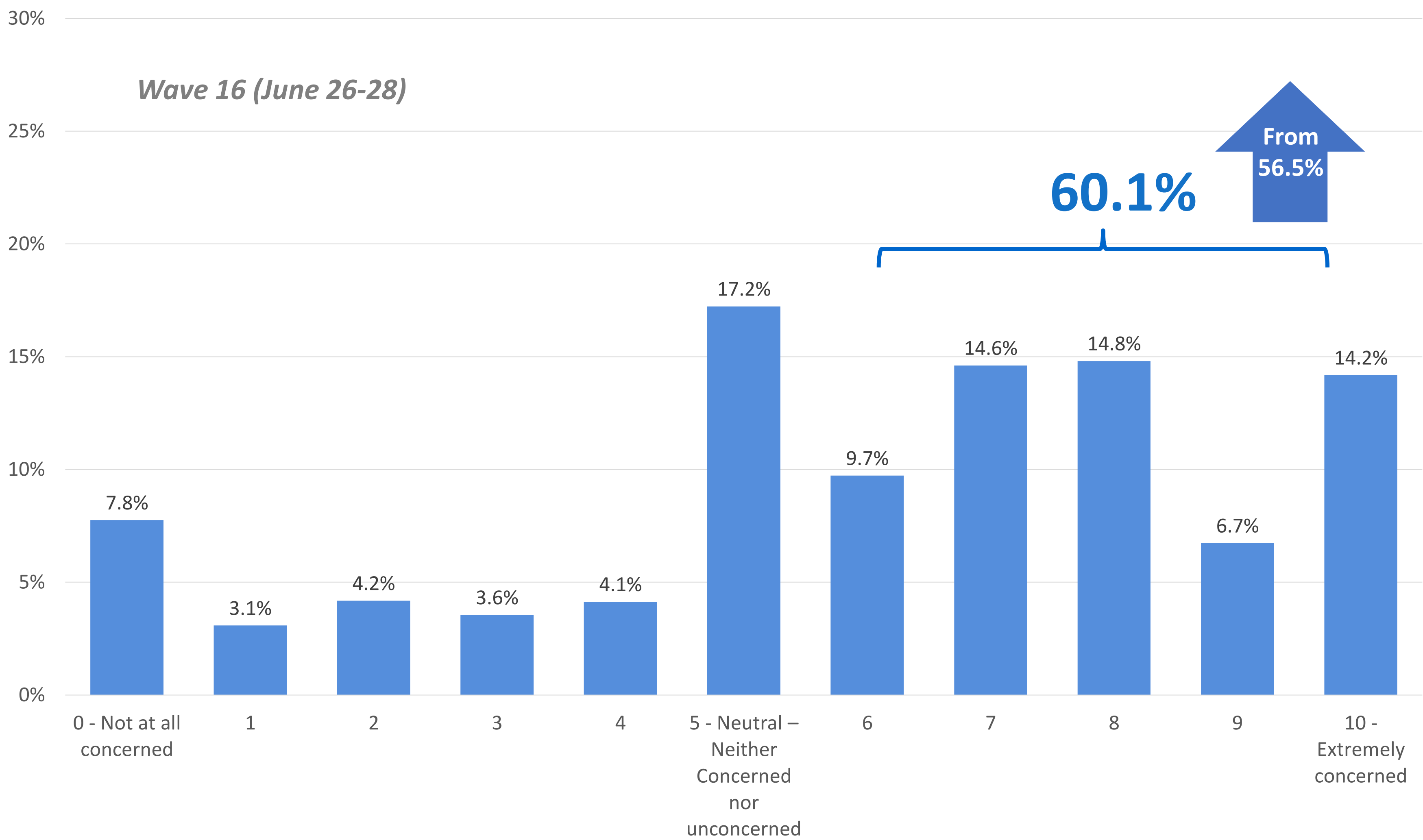


Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

Concerns About Personal Finances

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)

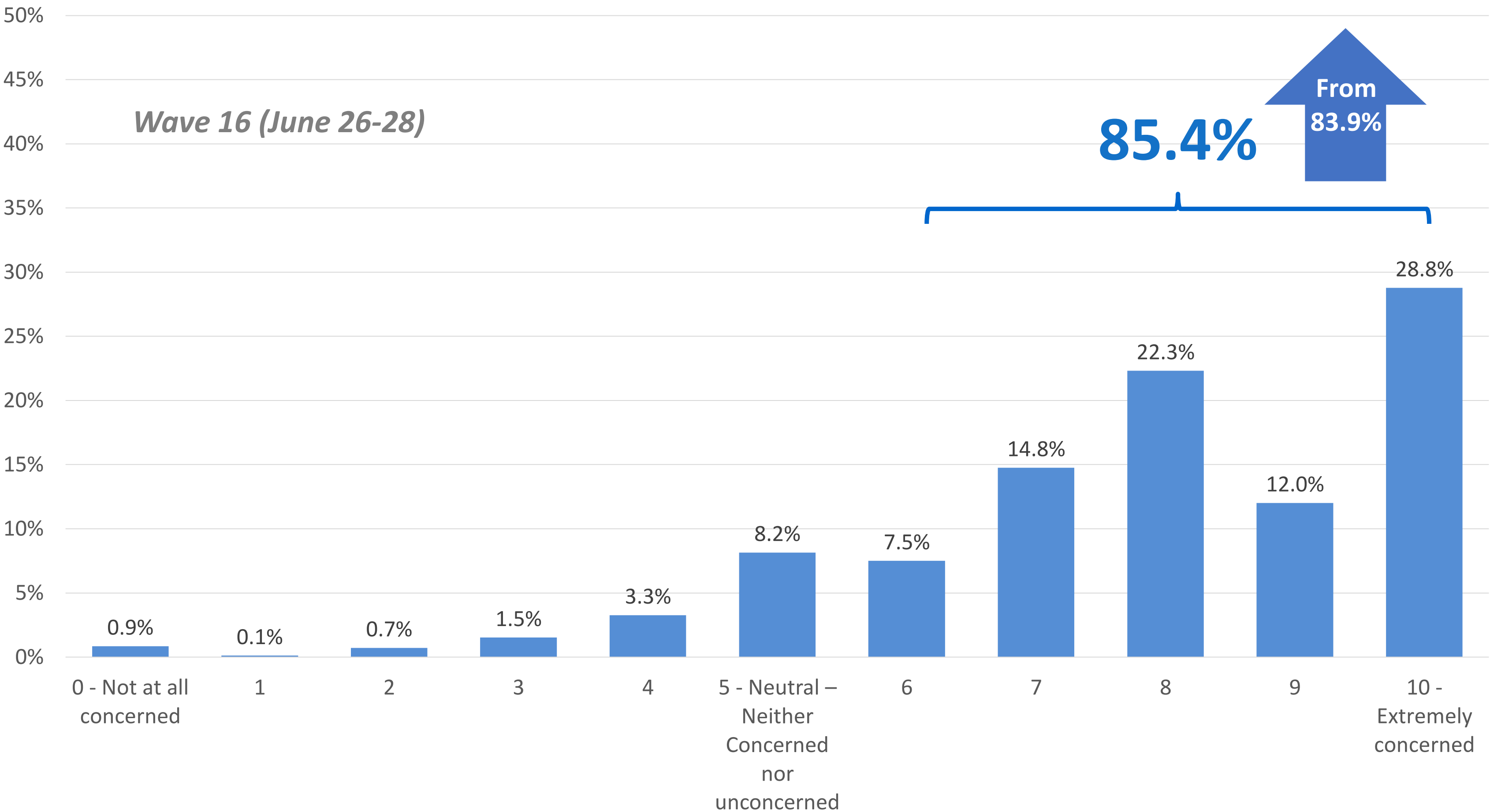
(Base: Wave 16 data. All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Concerns About National Economy

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

(Base: Wave 16 data. All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Personal Finances

Ratio of concerned (10-6) to unconcerned (0-4) on an 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

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

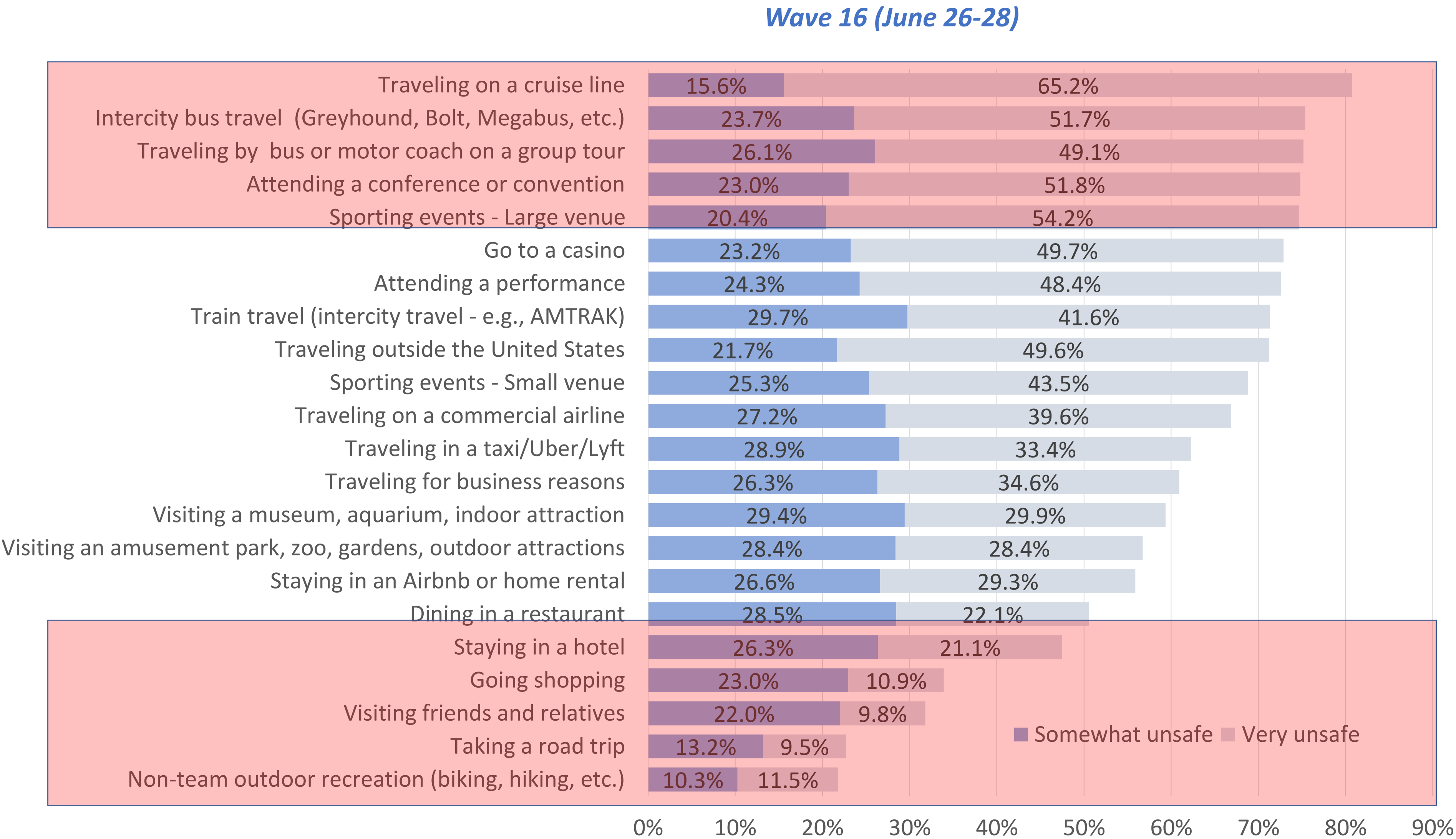


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the **NATIONAL ECONOMY**?

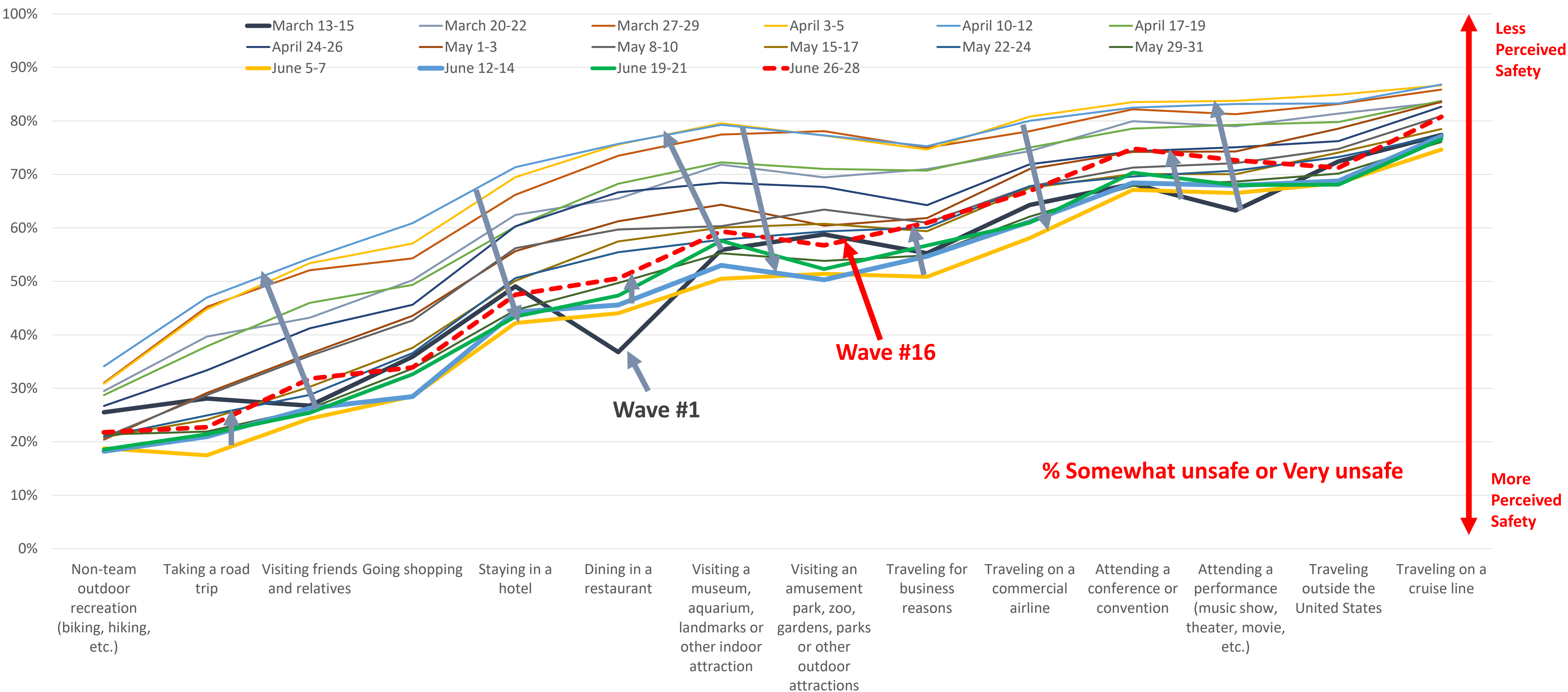
Perceived Safety of Travel Activities (Wave 16)

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

(Base: Wave 16 data. All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Perceived Safety of Travel Activities (Waves 1-16 Comparison)



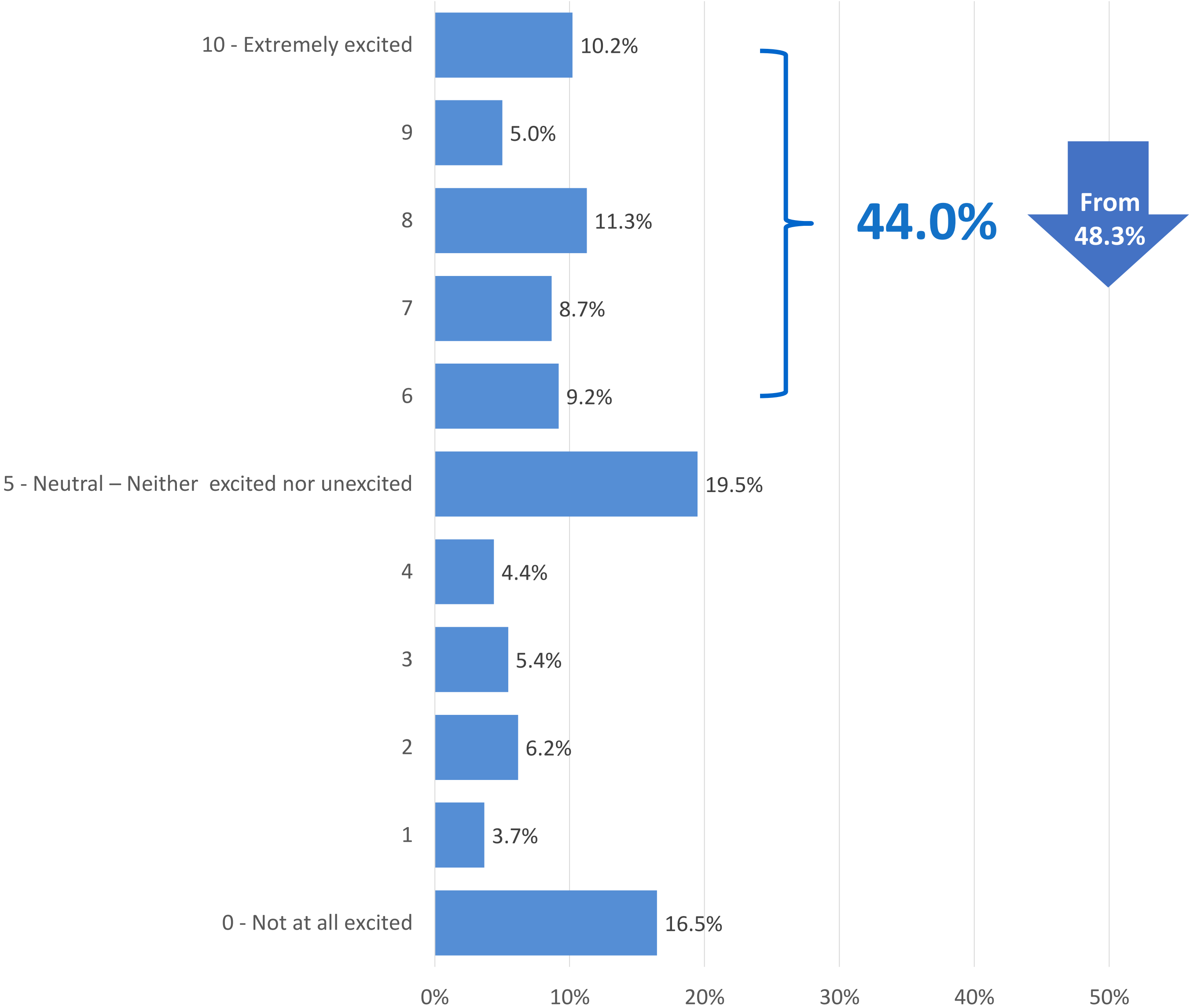
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28 2020)

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)

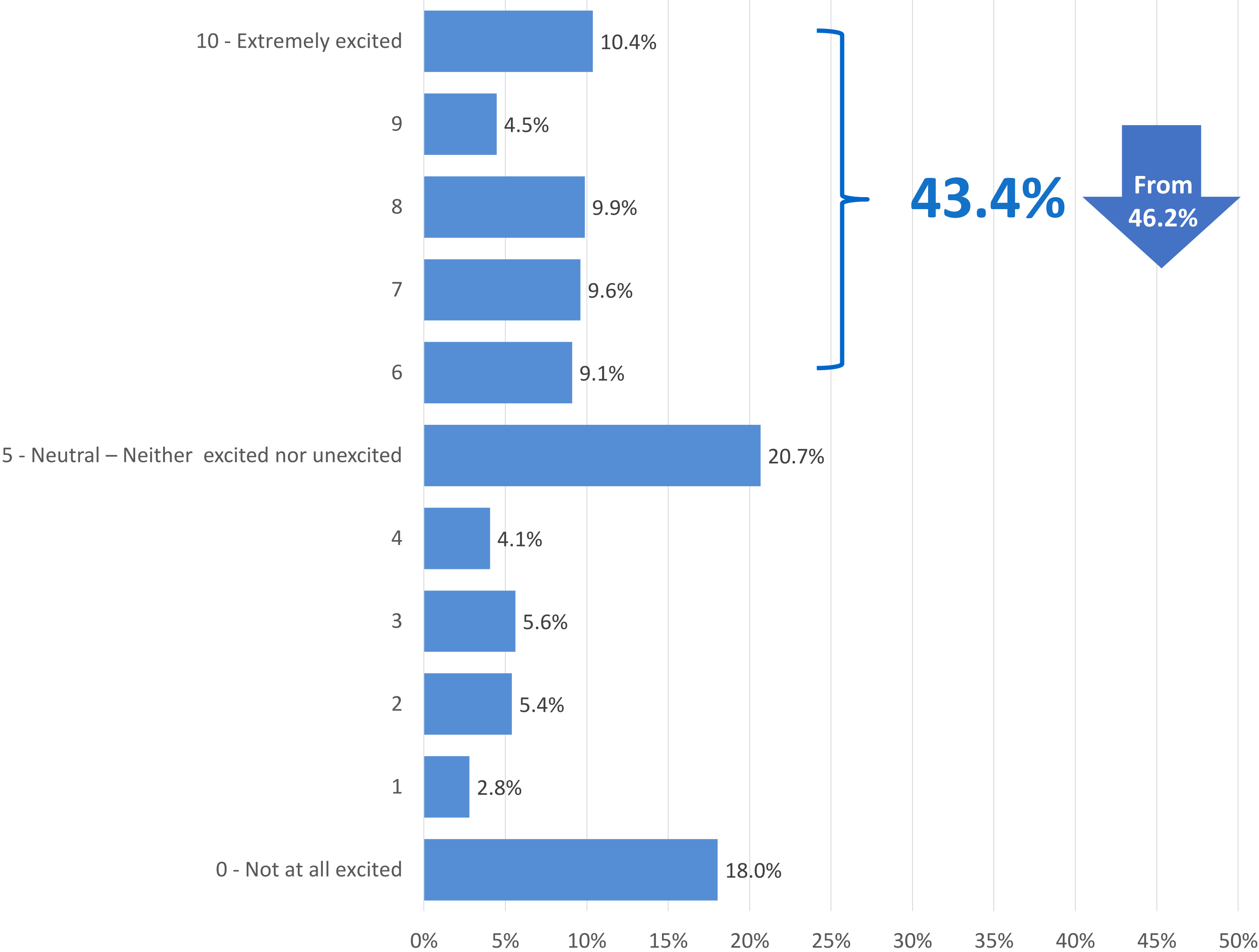
*(Base: All respondents, 1,231 completed surveys.
Data collected June 26-28, 2020)*



Openness to Travel Information

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

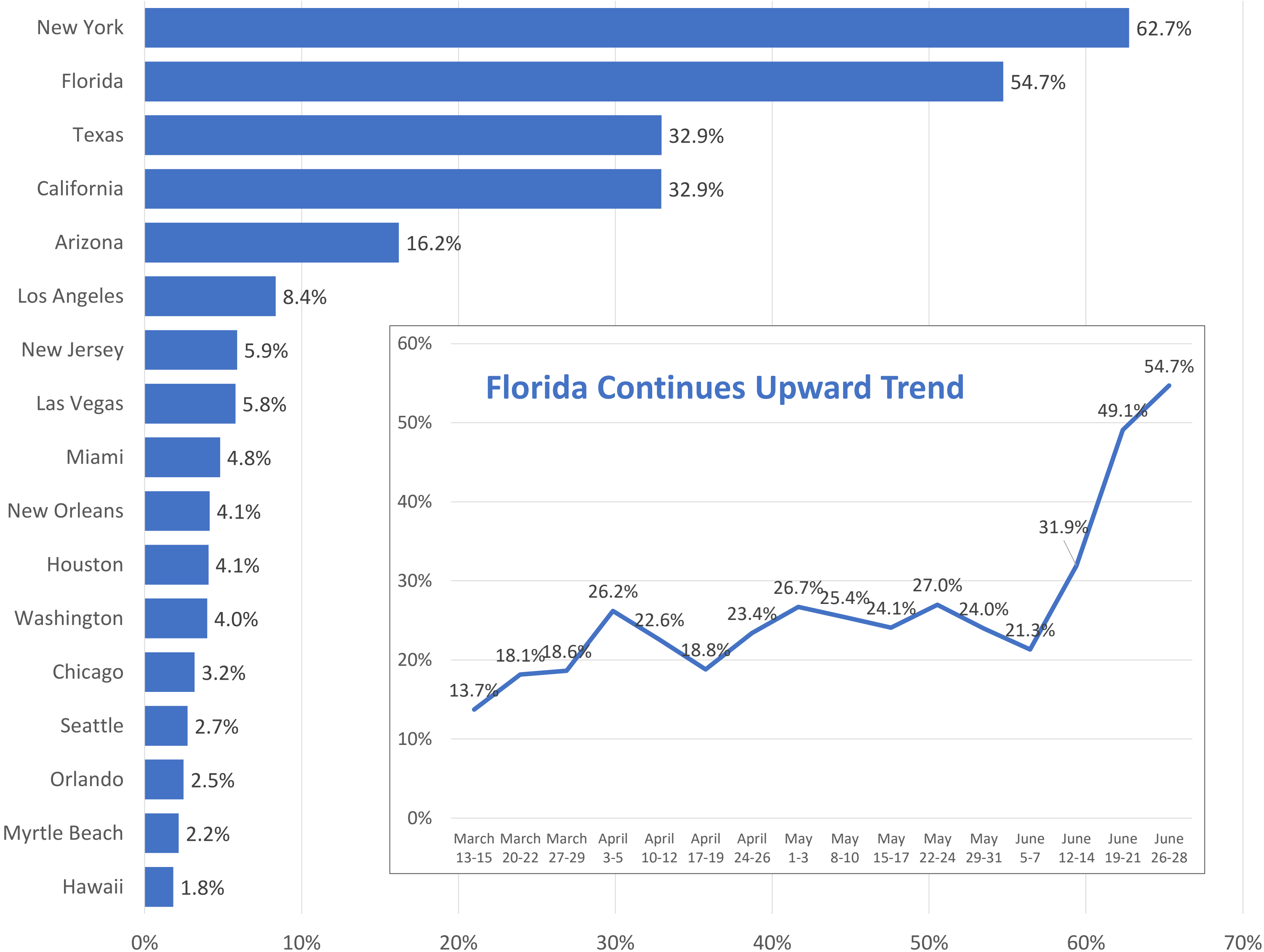
*(Base: All respondents, 1,231 completed surveys.
Data collected June 26-28, 2020)*



Most Talked About Coronavirus Hotspots

Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?

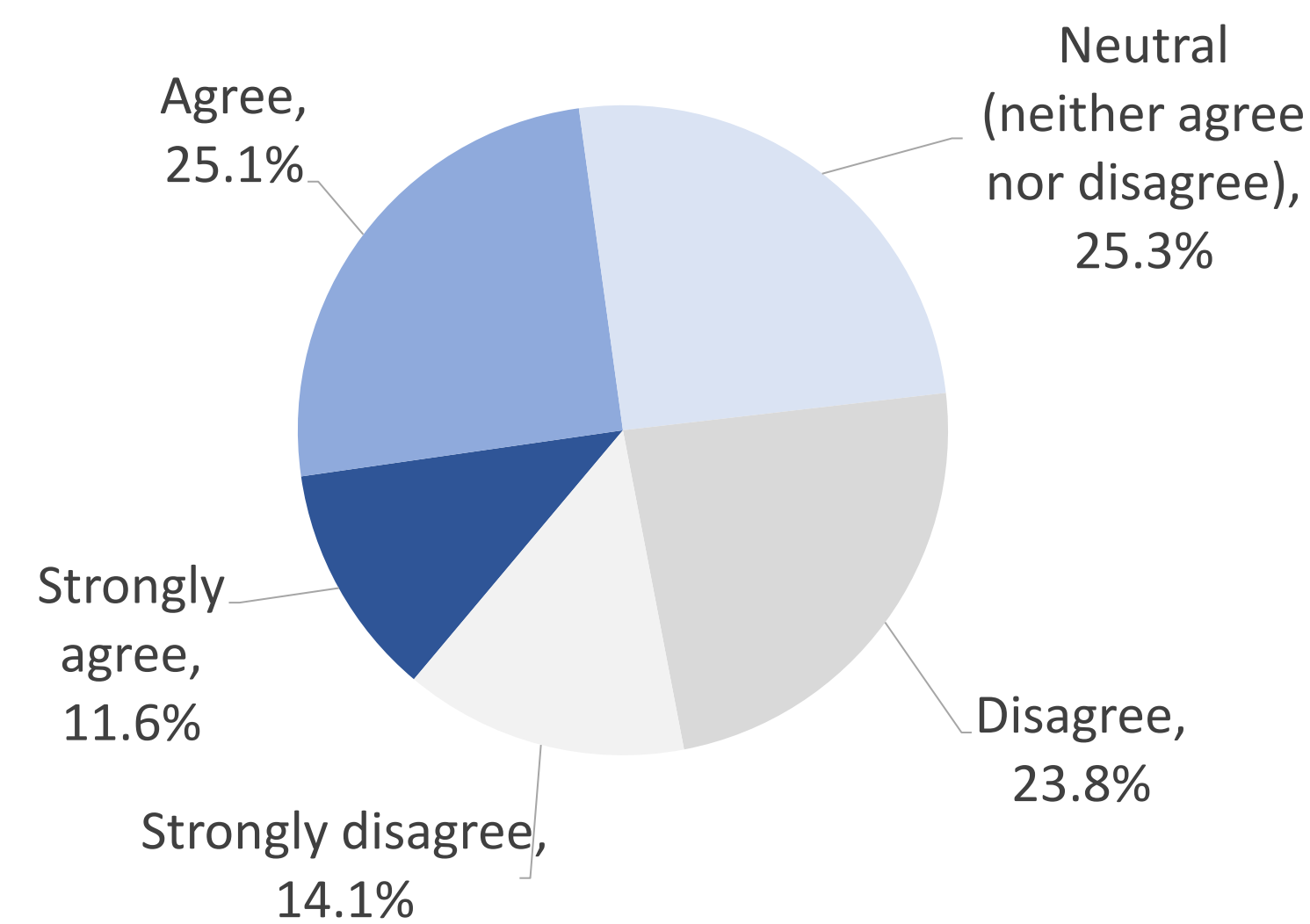
(Base: Wave 16: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



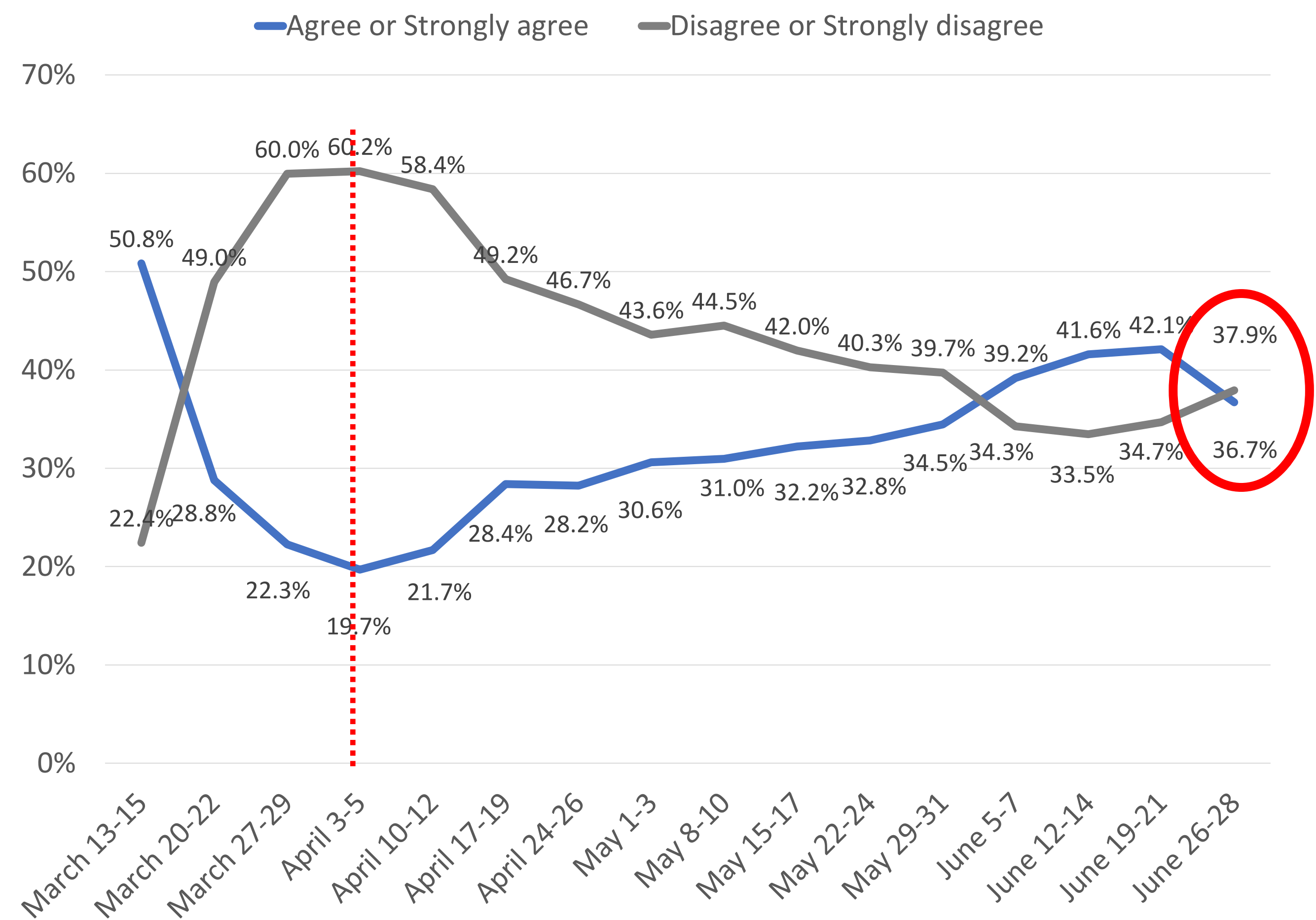
Comfort Enjoying Home Community

How much do you agree with the following statement?

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



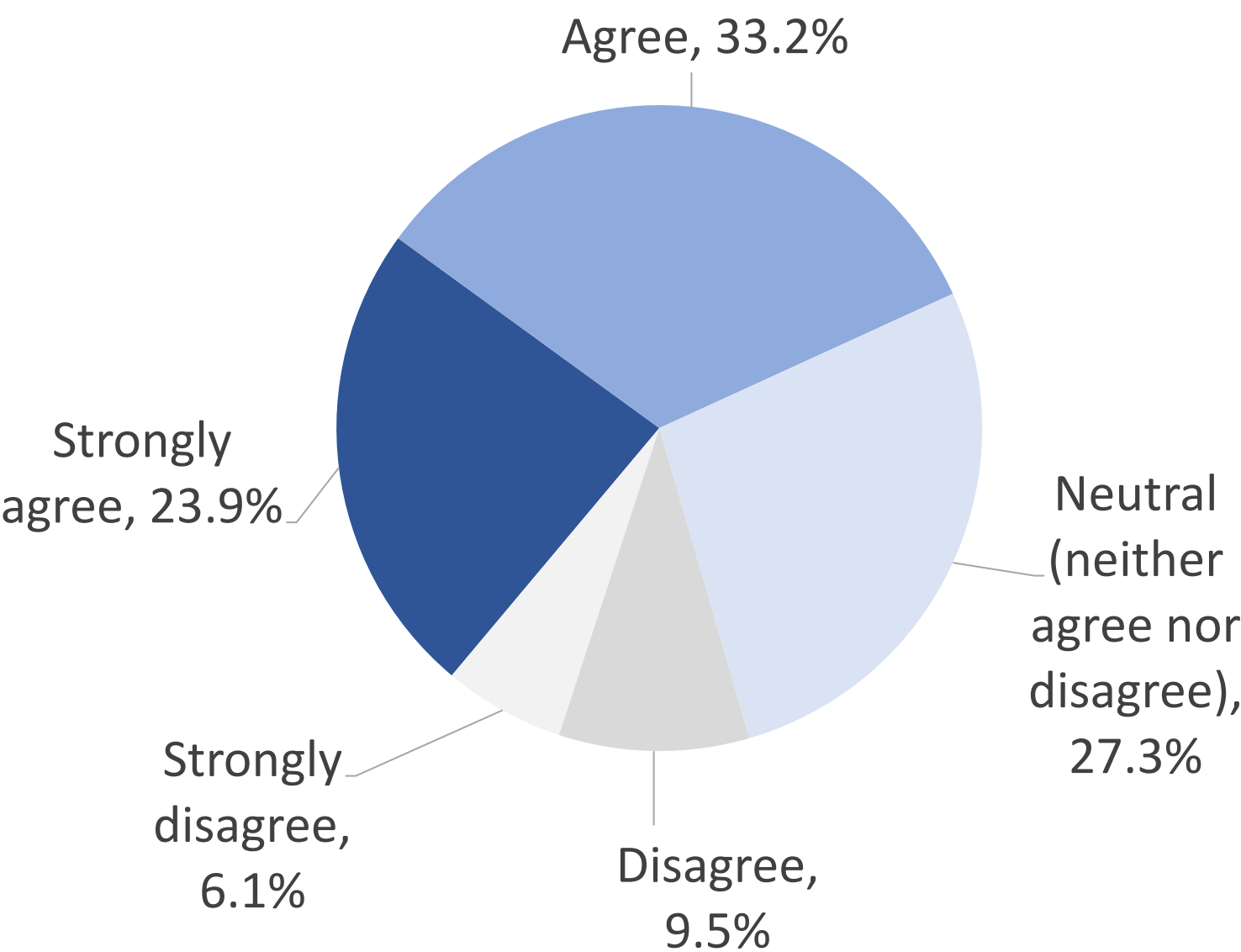
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28, 2020)



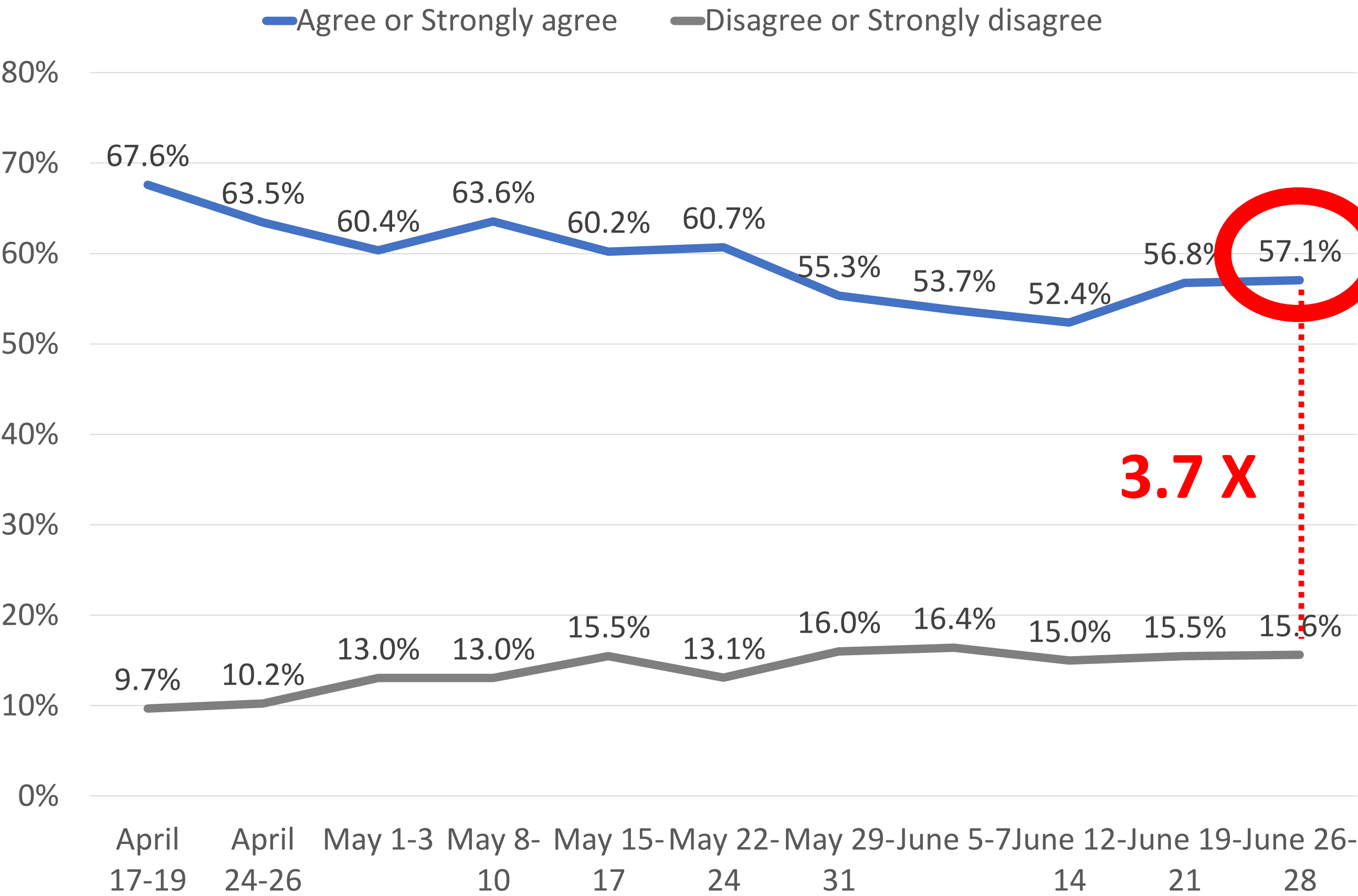
Travelers in Community are Unwanted

How much do you agree with the following statement?

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

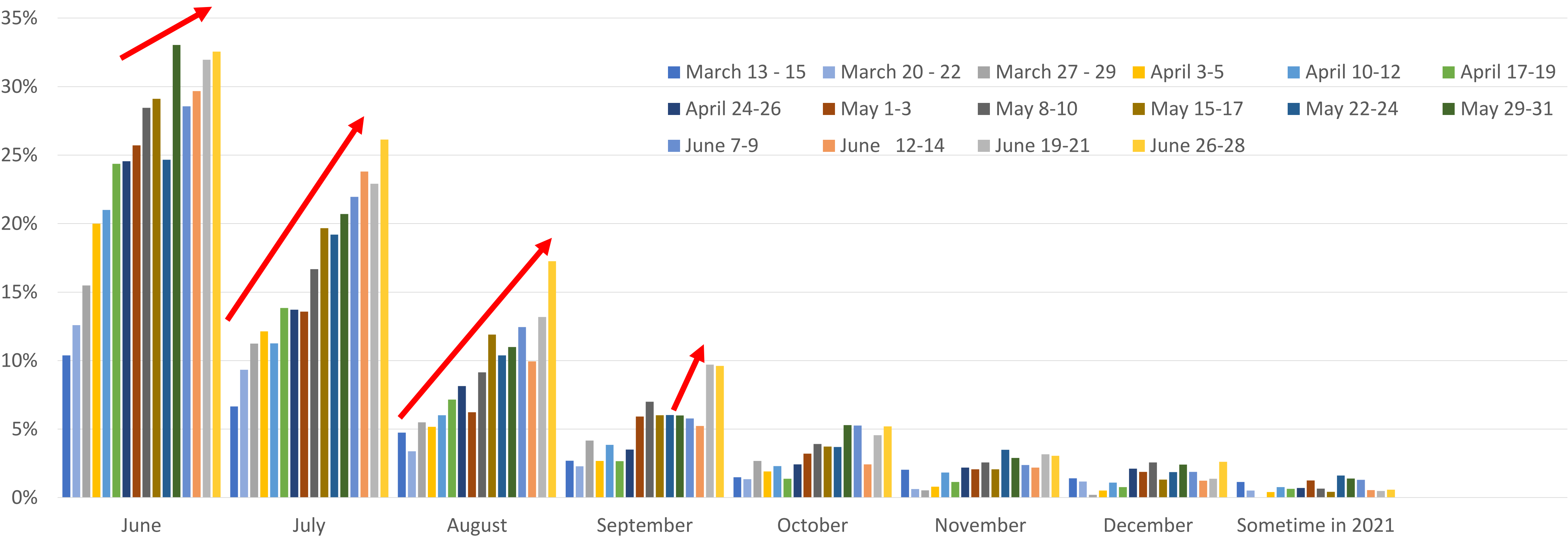


(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28, 2020)



Month of Trip Cancellation

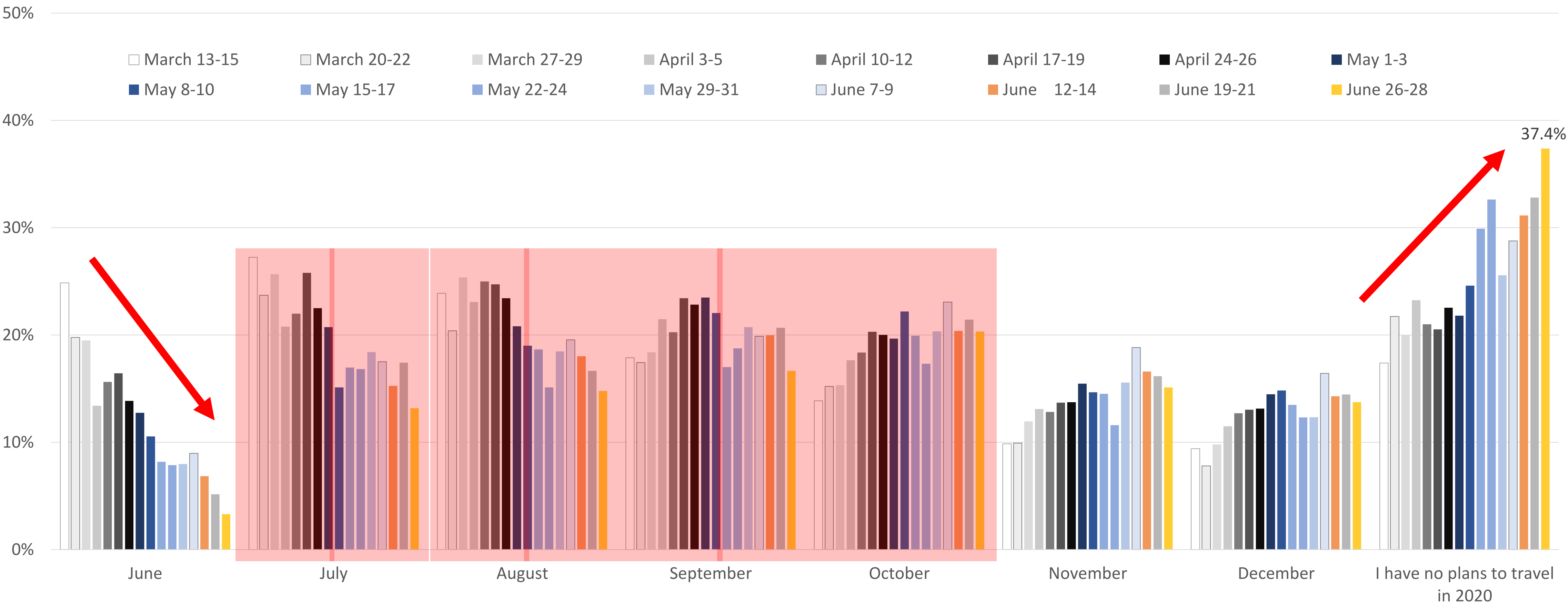
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)



(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640 and 665 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21 and 26-28 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, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28 2020)

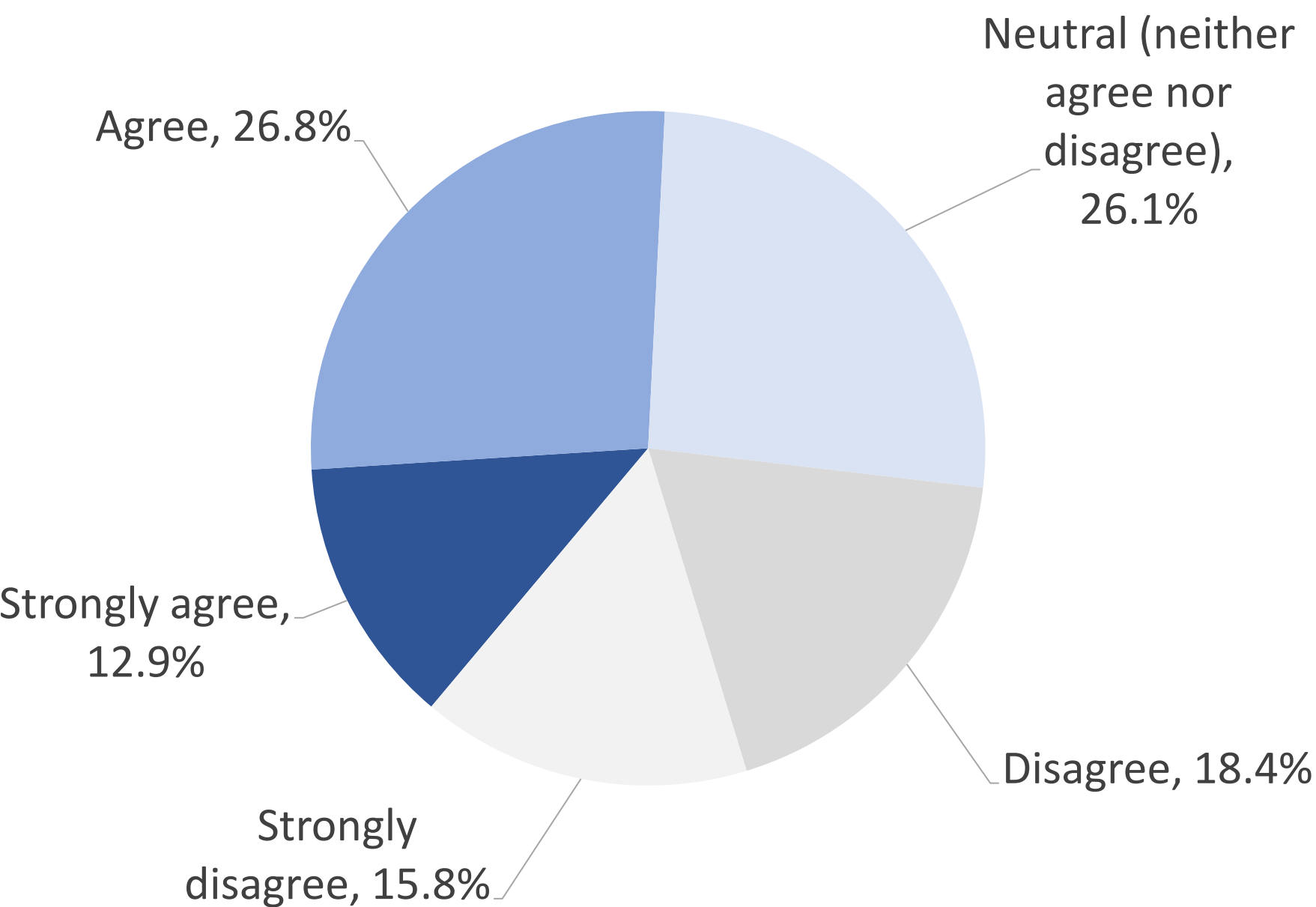
A warm, golden autumn scene. Sunlight filters through the trees, creating a soft, hazy glow. The foreground is covered in fallen leaves, and the background shows more trees with vibrant orange and red foliage. The overall mood is peaceful and nostalgic.

How are travelers feeling about the Fall?

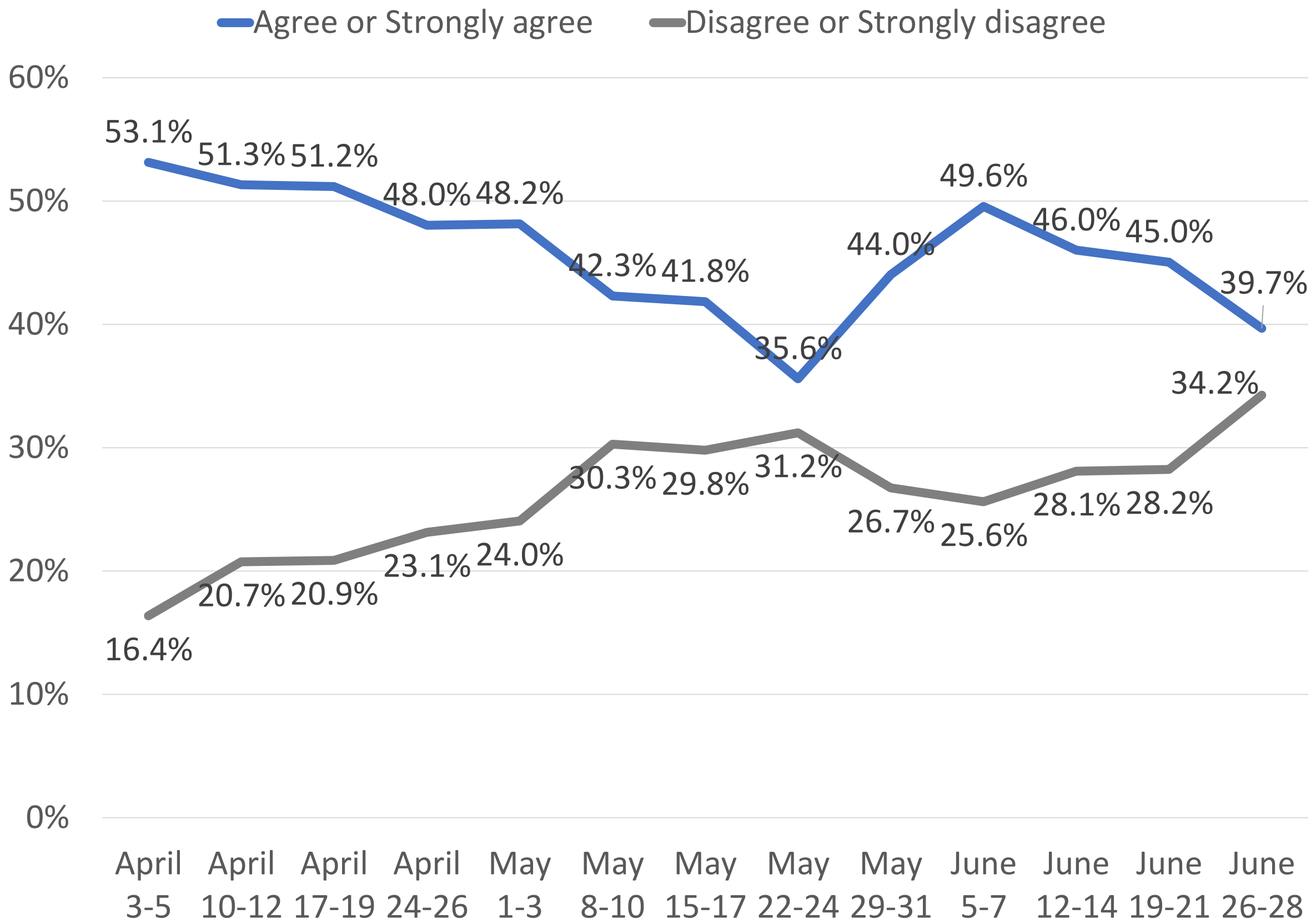
Expectations for Traveling in the Fall

How much do you agree with the following statement?

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



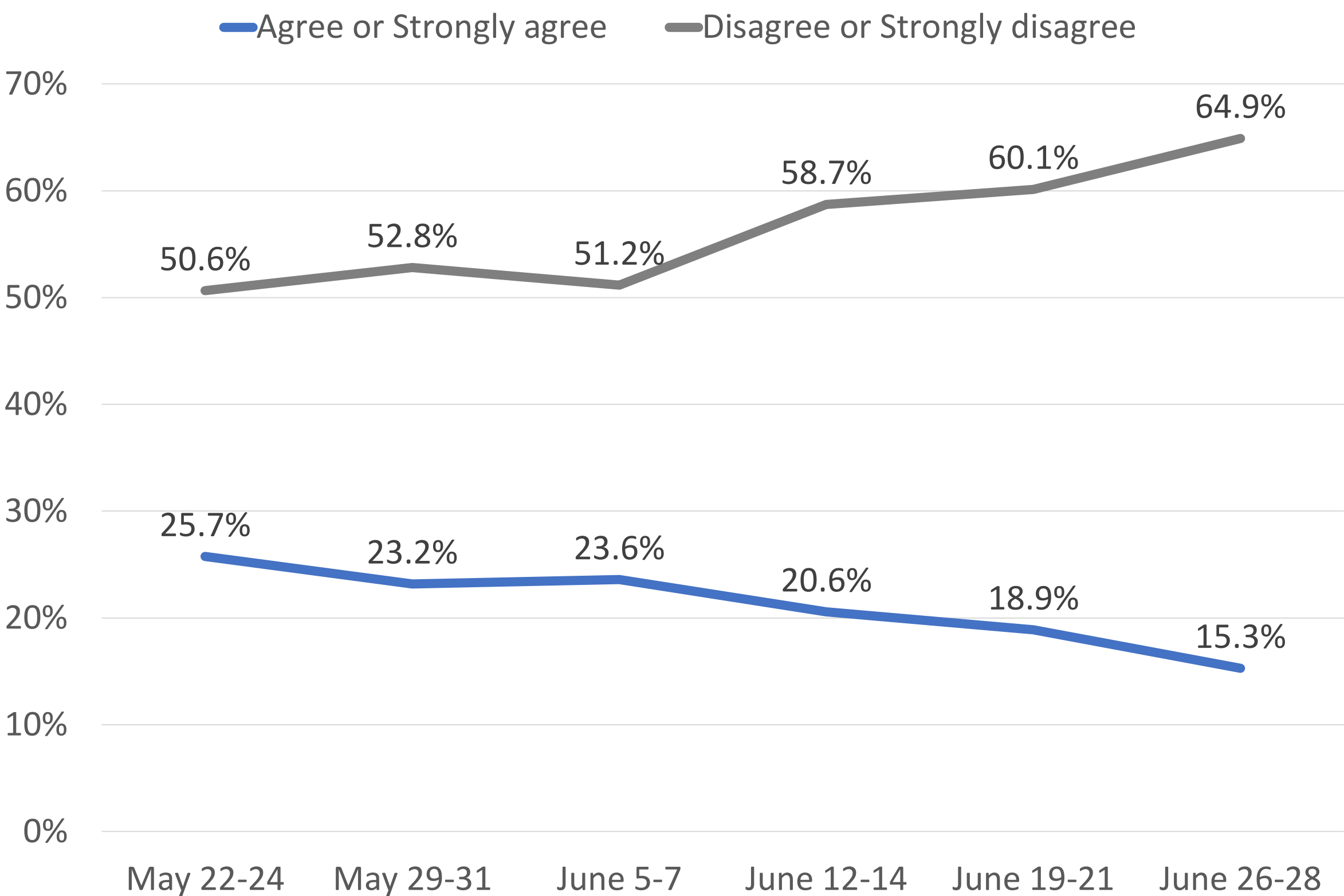
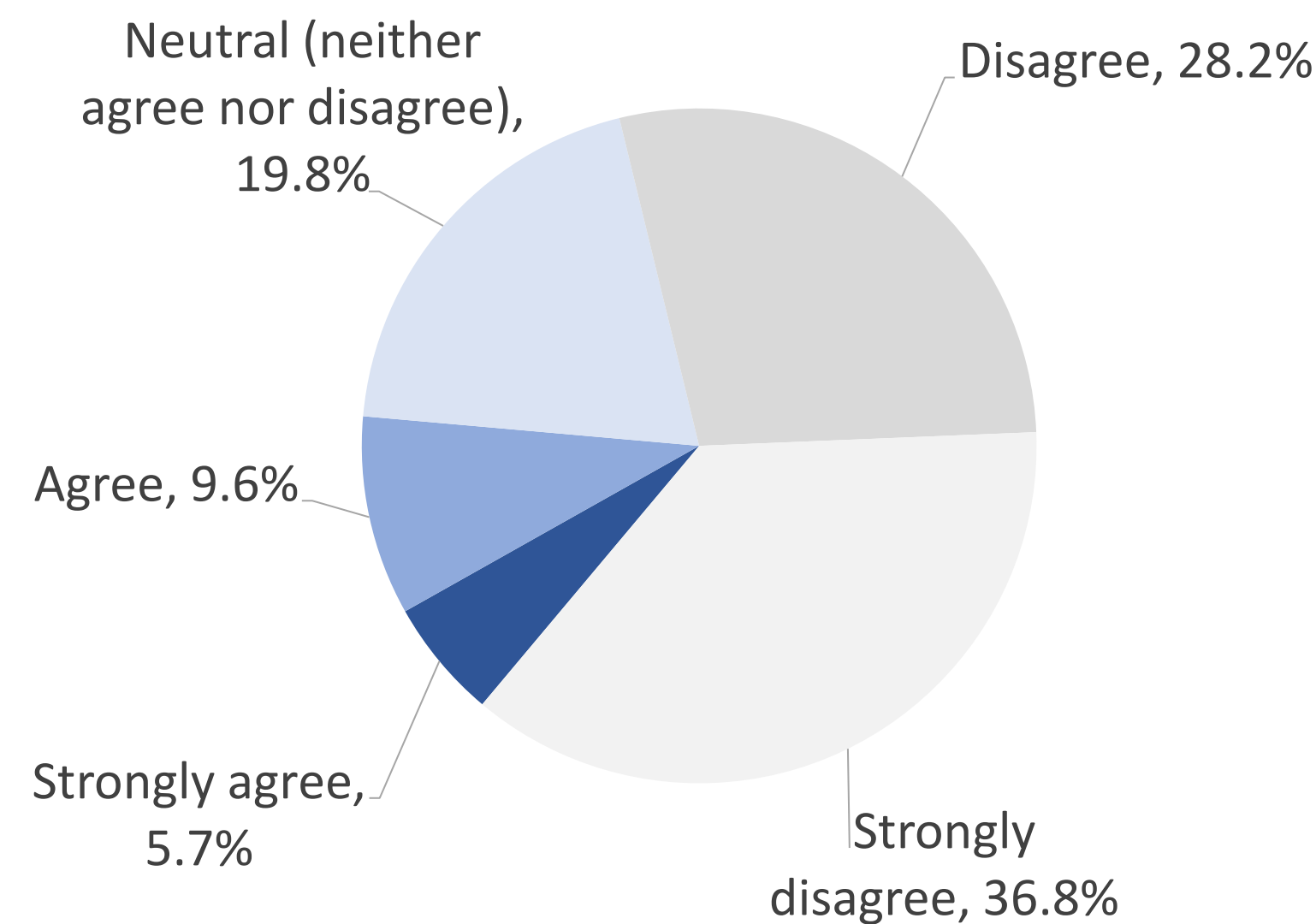
(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28, 2020)



Expectations for Fall Travel Season

How much do you agree with the following statement?

Statement: I expect the coronavirus situation will be resolved before Fall begins.



(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205 and 1,231 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21 and 26-28, 2020)



KEY TAKEAWAYS

- **Concerns about the pandemic worsening in the next month have risen sharply**
- **Fear of personally contracting the virus as well as fears for friends and relatives have also increased over the past two week.**
- **The majority of travelers are concerned about the pandemic hurting their personal finances, and concerns about the national economy are nearly universal.**
- **Over the past 3 weeks, individual travel activities are being seen as increasingly less safe**
- **Most travelers are still not ready to see visitors in their own communities**
- **Summer months are seeing increasing trips cancelations and postponements**

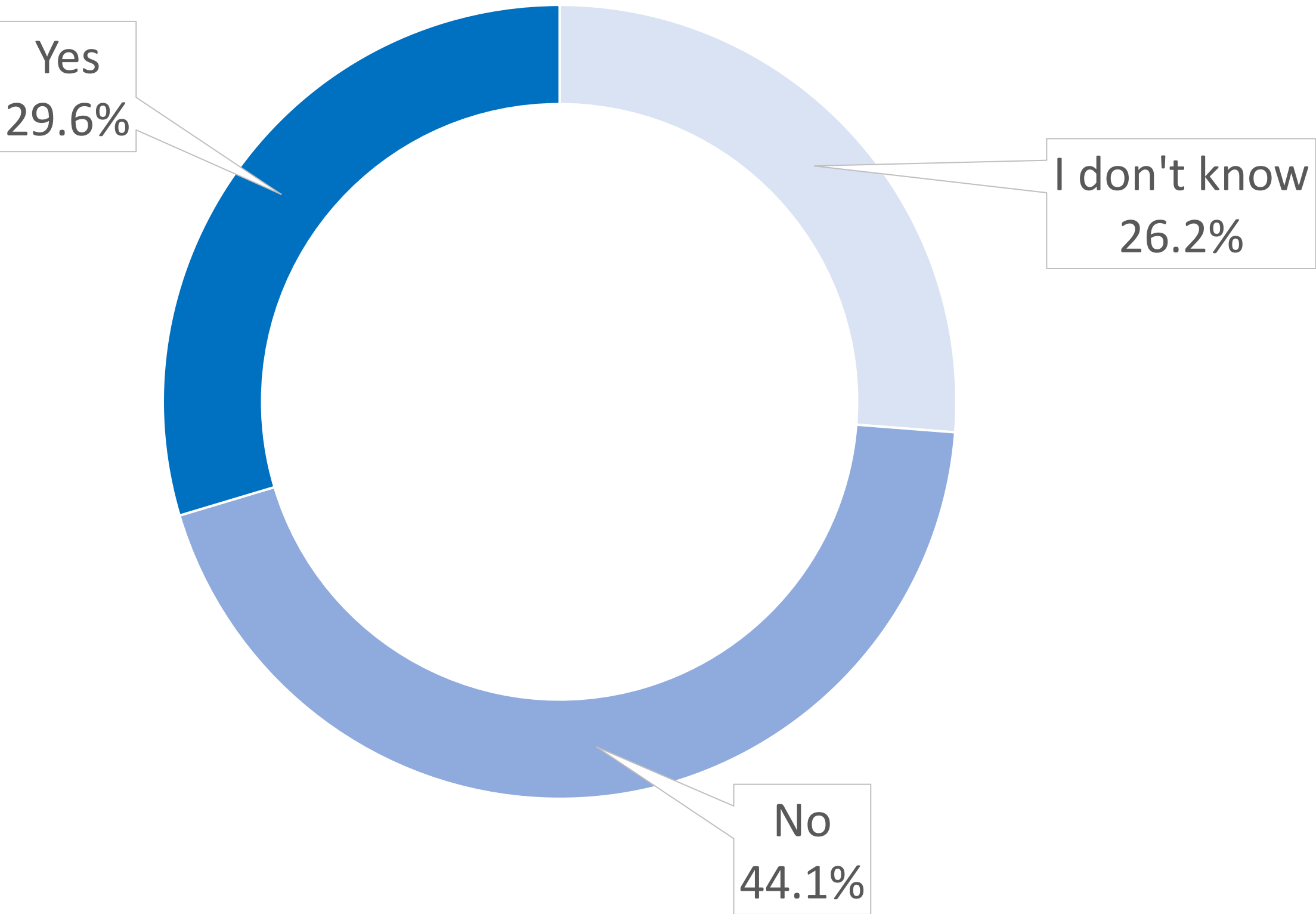
A top-down view of a person's hands planning a trip on a large map spread across a dark wooden table. The person's left hand holds a dark wooden mug filled with a dark liquid, while their right hand points to a specific location on the map. A red string is strung across the map, connecting several red pushpins that mark travel stops. To the left of the map, a small notebook with a black pen and a few more red pushpins are visible. Three small photographs of scenic landscapes are pinned to the map: one in the top right corner, one in the middle right, and one in the bottom left. The overall scene suggests a thoughtful and creative travel planning process.

Are Their Specific Destinations Travelers Won't Visit?

Specific Destinations that Will be Avoided

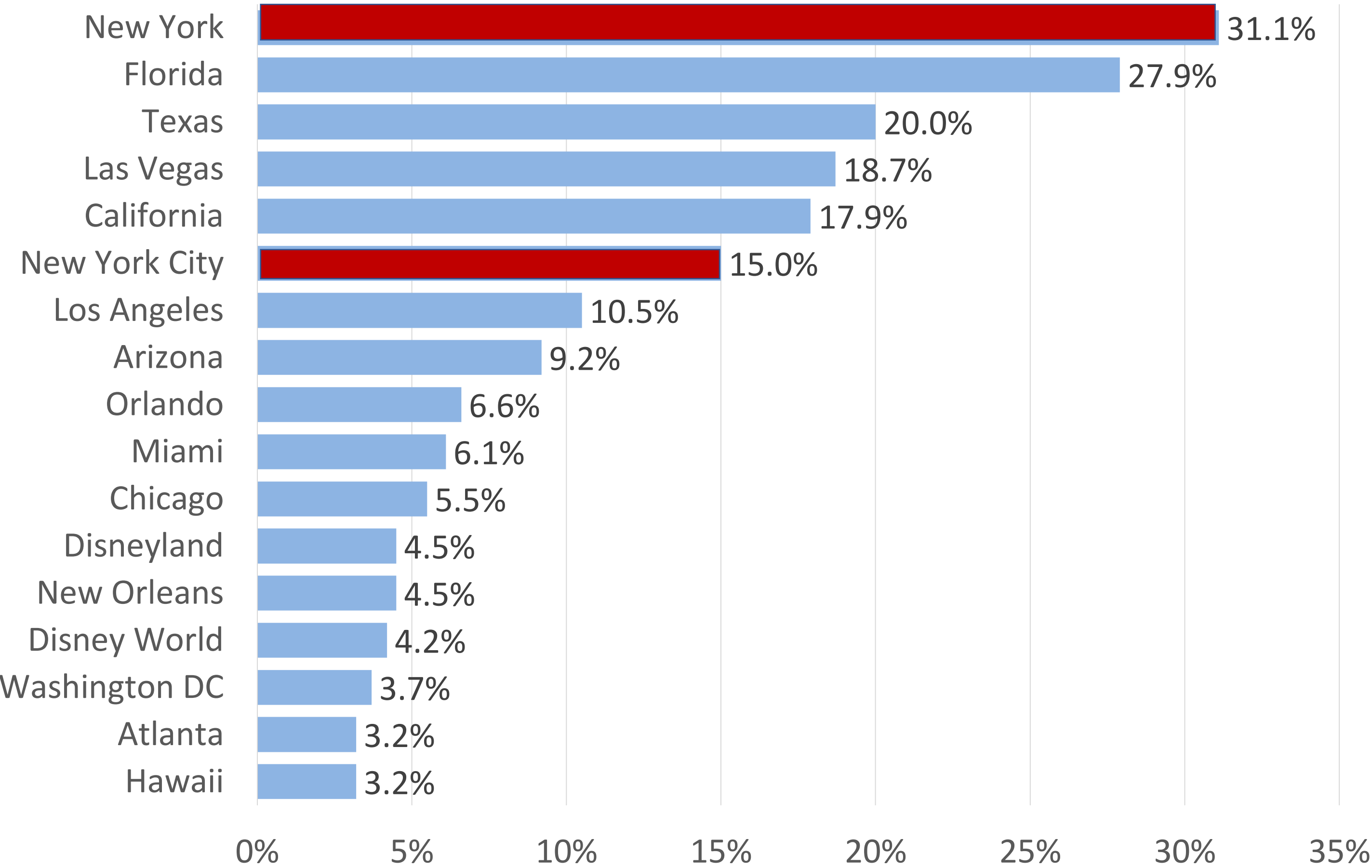
Question: Thinking about LATER THIS YEAR (2020), are there any domestic destinations YOU MIGHT NORMALLY CONSIDER VISITING that you would now ABSOLUTELY NOT VISIT due to the Coronvirus situation?

(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Travelers Who Say They Will Avoid Specific Domestic Destinations: Destinations that Will be Avoided

Question: What are these domestic destinations that you would absolutely not visit later this year? Write in as many as FIVE.

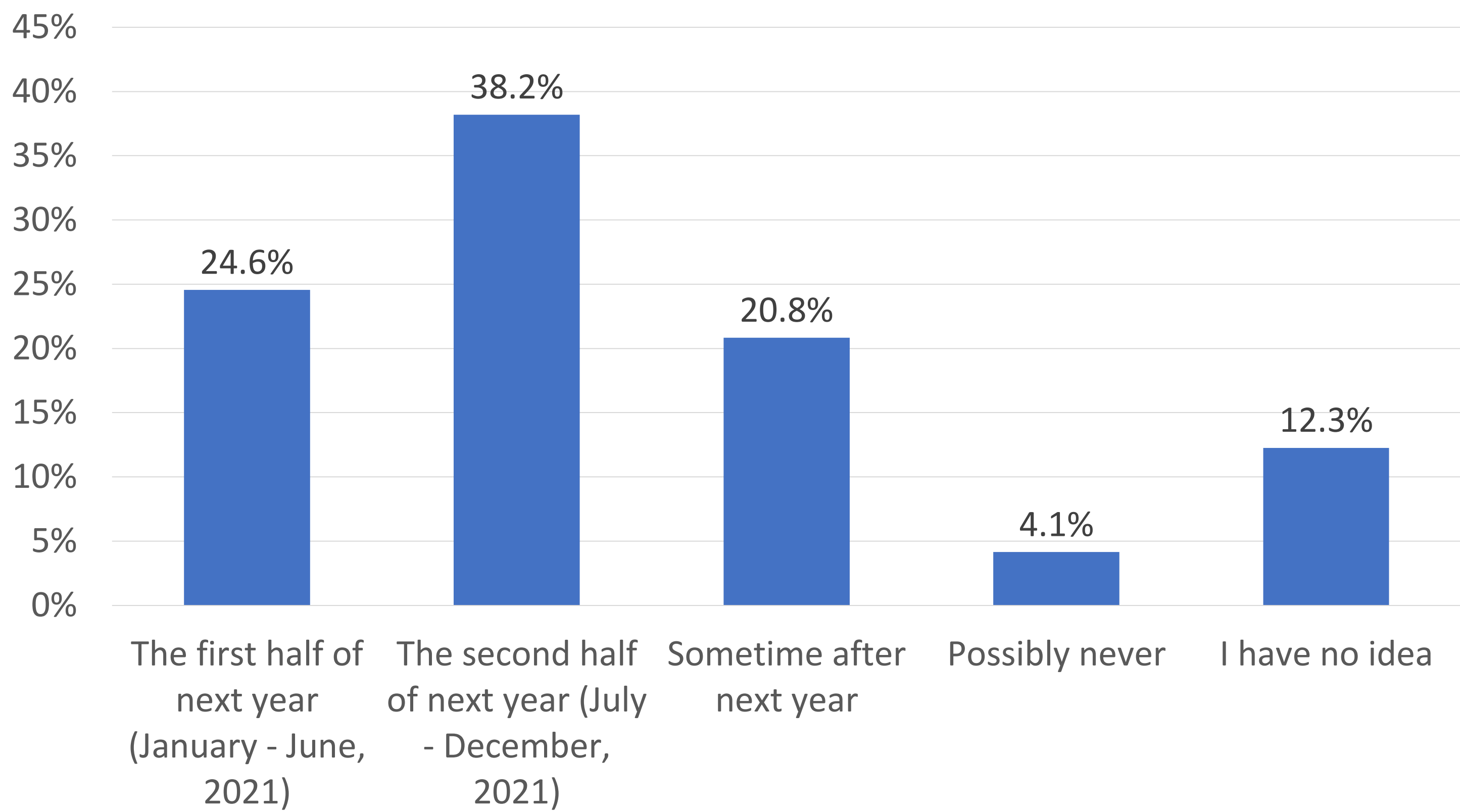


(Base: Respondents who would not visit specific destinations due to pandemic, 380 completed surveys. Data collected June 26-28, 2020)

When Will Travelers Return?

Question: When do you expect you will feel comfortable visiting the destinations you listed? (Select the one that best describes you)

(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



A composite image of a mountain landscape. In the foreground, a two-lane asphalt road with white dashed and solid lines curves through a green field. A metal guardrail runs along the right side of the road. In the background, jagged, rocky mountain peaks are visible. The sky is a mix of dark blue and orange, with a full moon in the upper left and a bright sun in the upper right, creating a lens flare effect. The text "Opinions on Quarantine Policies" is centered in the middle of the image in a white, sans-serif font.

Opinions on Quarantine Policies



CBS New York

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Coronavirus Travel Advisory Goes Into Effect In N.Y., N.J., Conn.; Massive Fines Possible For Quarantine Non-Compliance

June 25, 2020 at 1:10 pm Filed Under: [Connecticut](#), [Coronavirus](#), [COVID-19](#), [John Dias](#), [Local TV](#), [New Jersey](#), [New York](#), [Travel Advisory](#)



HEADLINES

BRUSH FIRE BREAKS OUT NEAR NEW JERSEY TURNPIKE

82° 12:04 PM

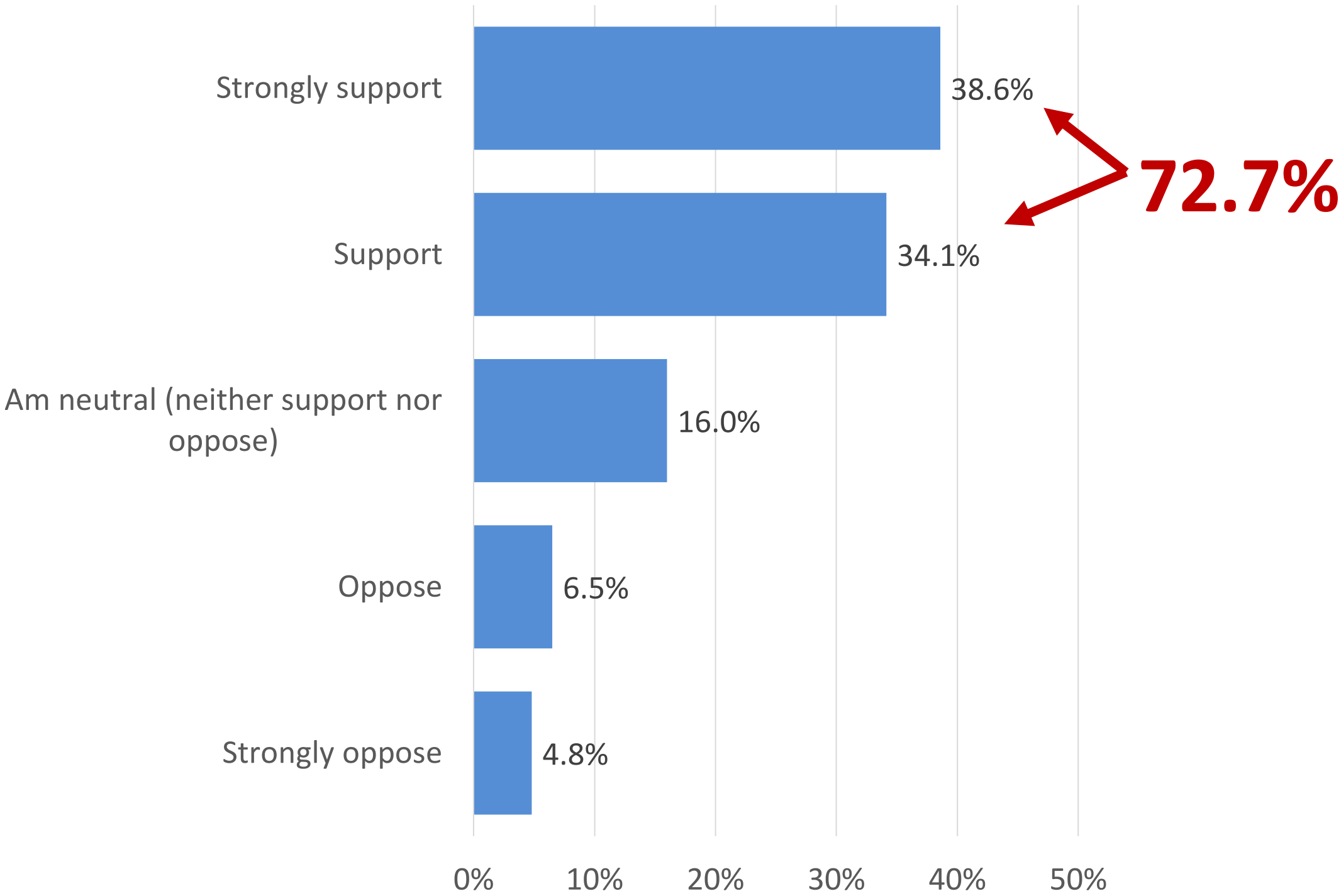


00:39 / 02:53

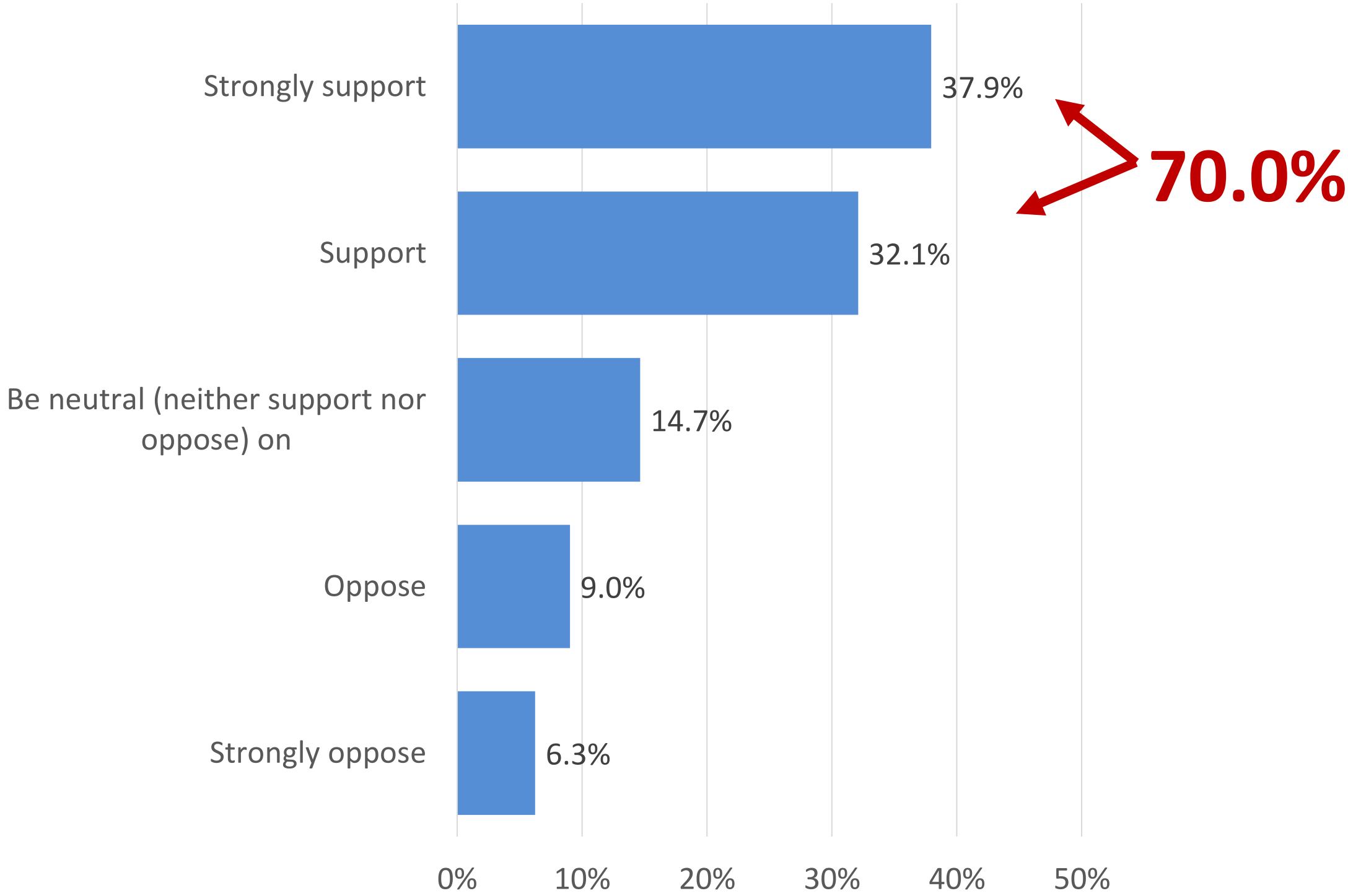


Support for State-level Quarantines

Question: This week, several states announced they were putting in place 14-day quarantines for people arriving from states with high incidences of Coronavirus. Do you support or oppose such state policies?

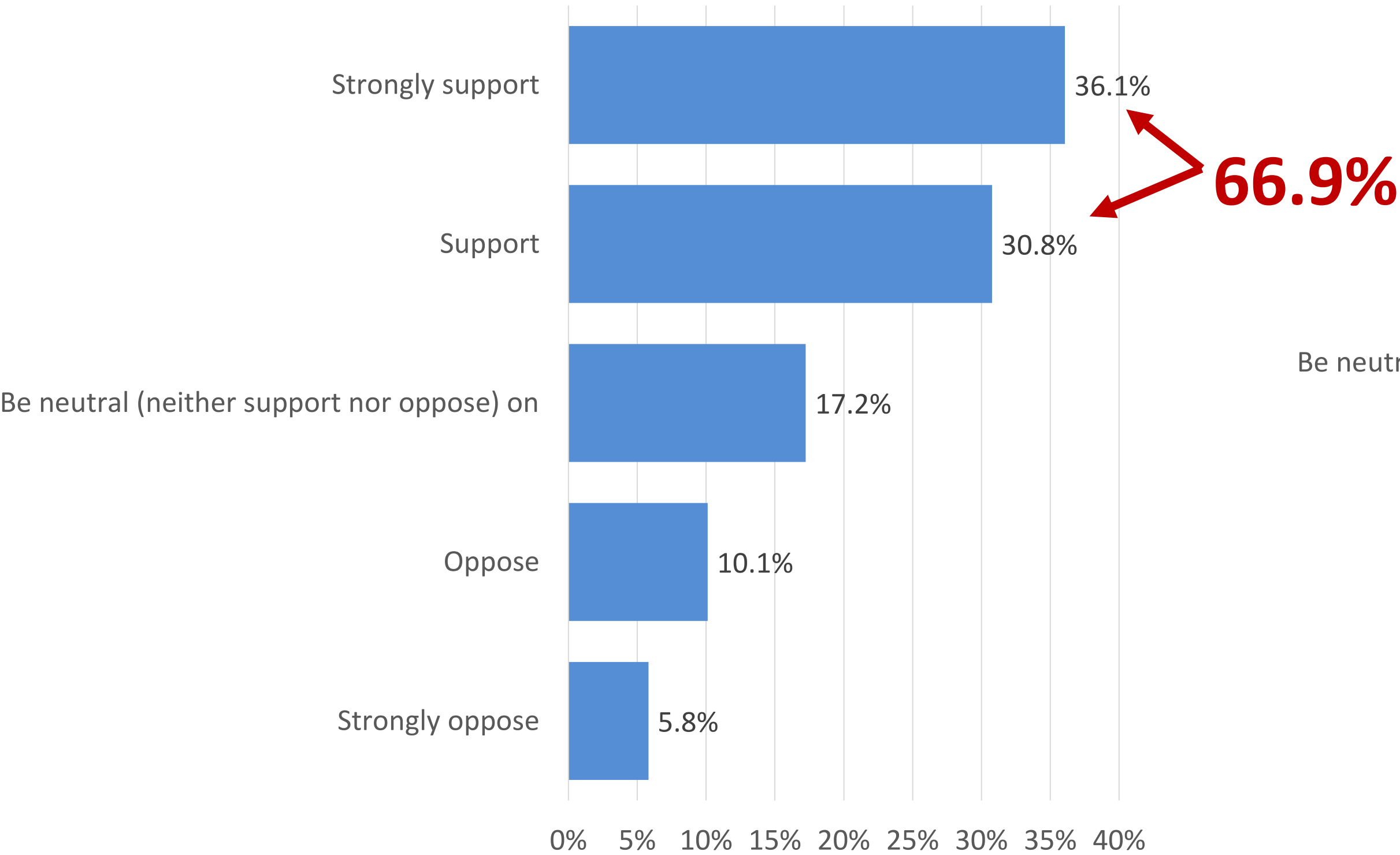


Question: Would you support or oppose **your state** putting in place such a 14-day quarantine policy?

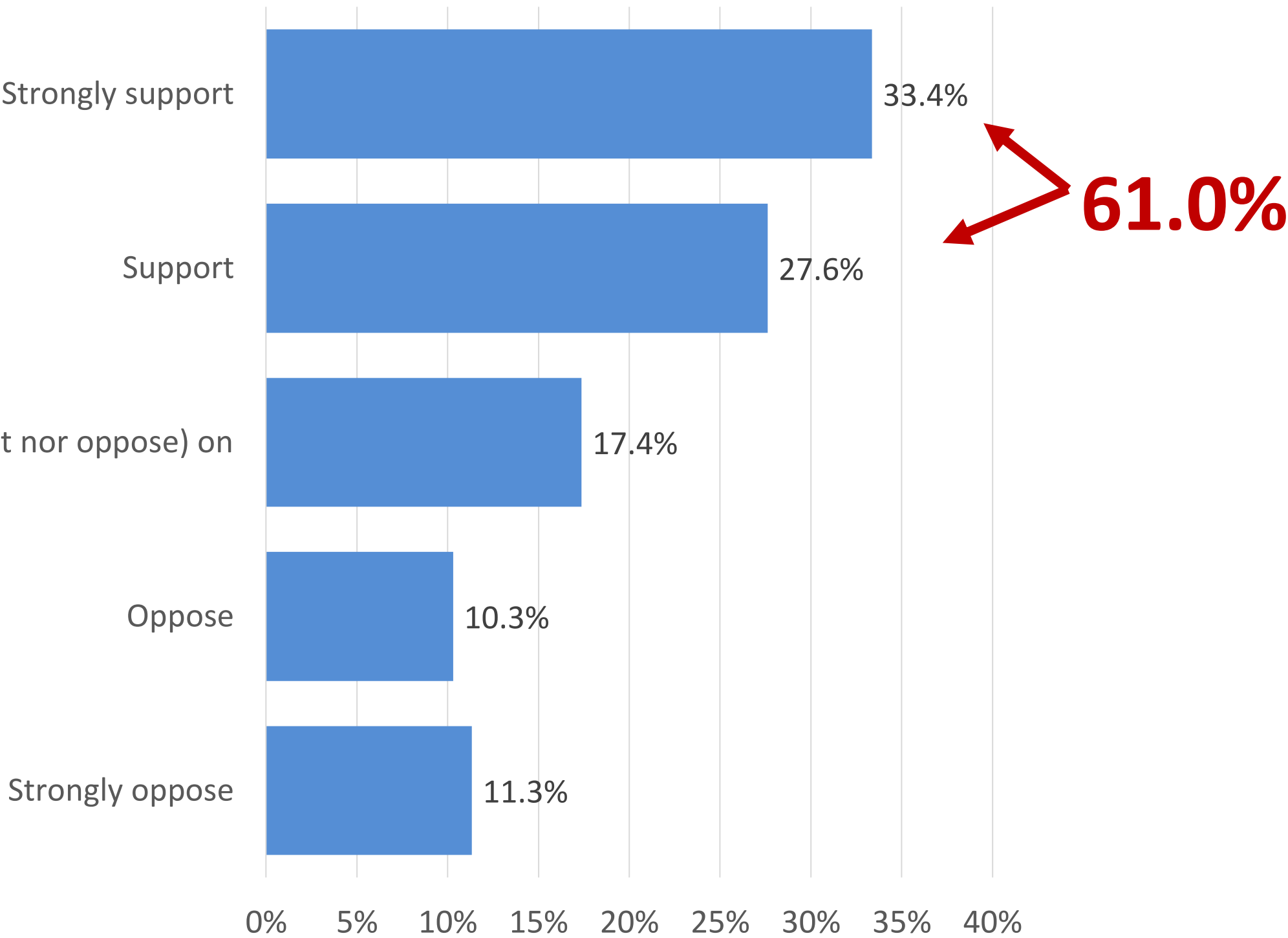


Support for Local Quarantines and Ticketing

Question: Would you support or oppose **your community** putting in place a 14-day quarantine policy?



Question: Would you support your community ticketing and/or fining persons not wearing masks in public?





KEY TAKEAWAYS

- **About 1-in-3 travelers say they will absolutely not consider visiting specific destinations this year due to the Coronavirus situation.**
- **These destinations closely mirror those getting the most attention in the media as “talked about” places with the coronavirus.**
- **The majority of travelers support 14 day travel quarantine policies for other states, their home state and the communities in which they live.**
- **Similarly, most travelers support tickets/fines for persons not following face mask laws.**

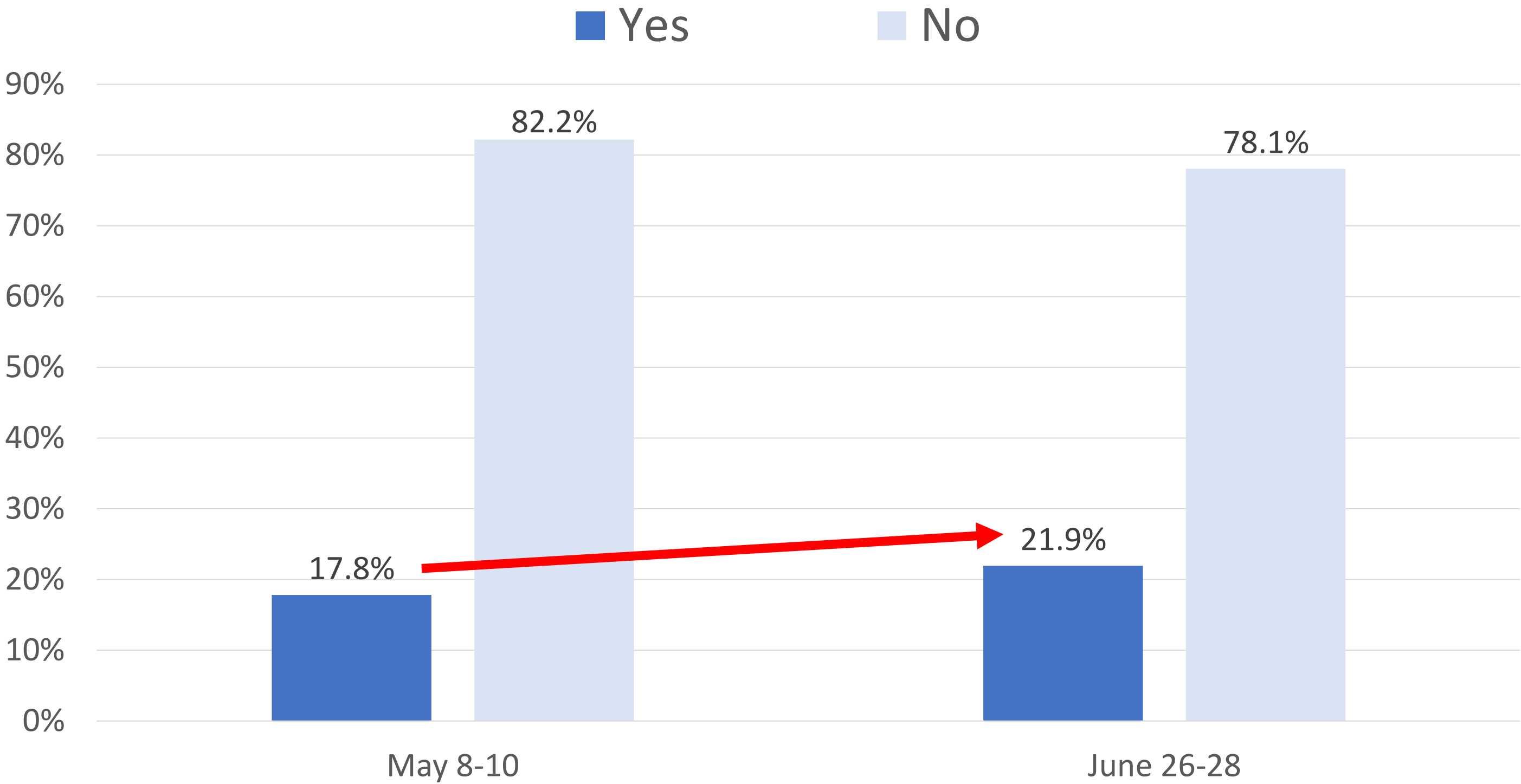
Advertising in the Pandemic



Recall of Travel Advertisements

Question: Do you recall seeing any specific advertisements for any travel destinations in the past month?

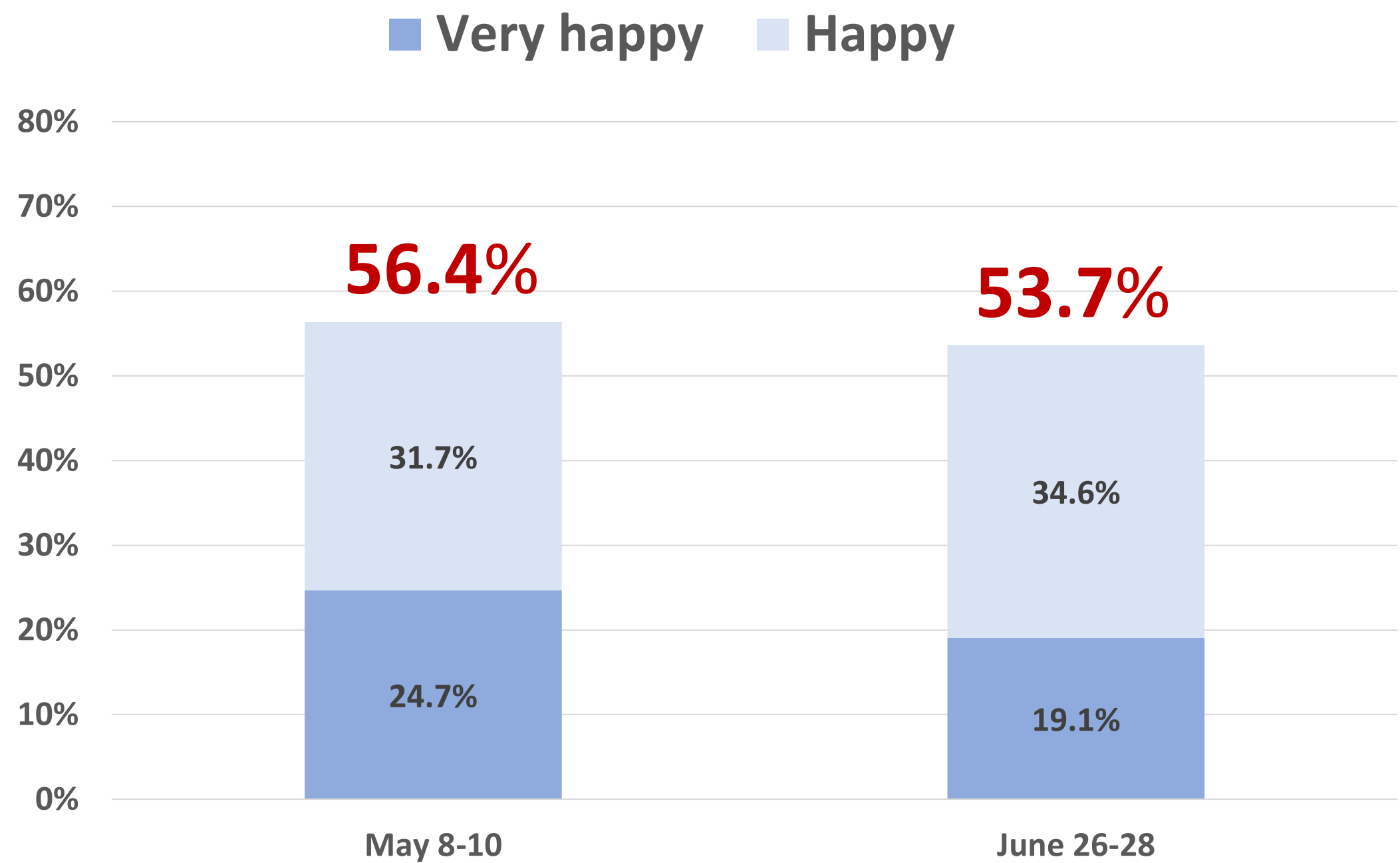
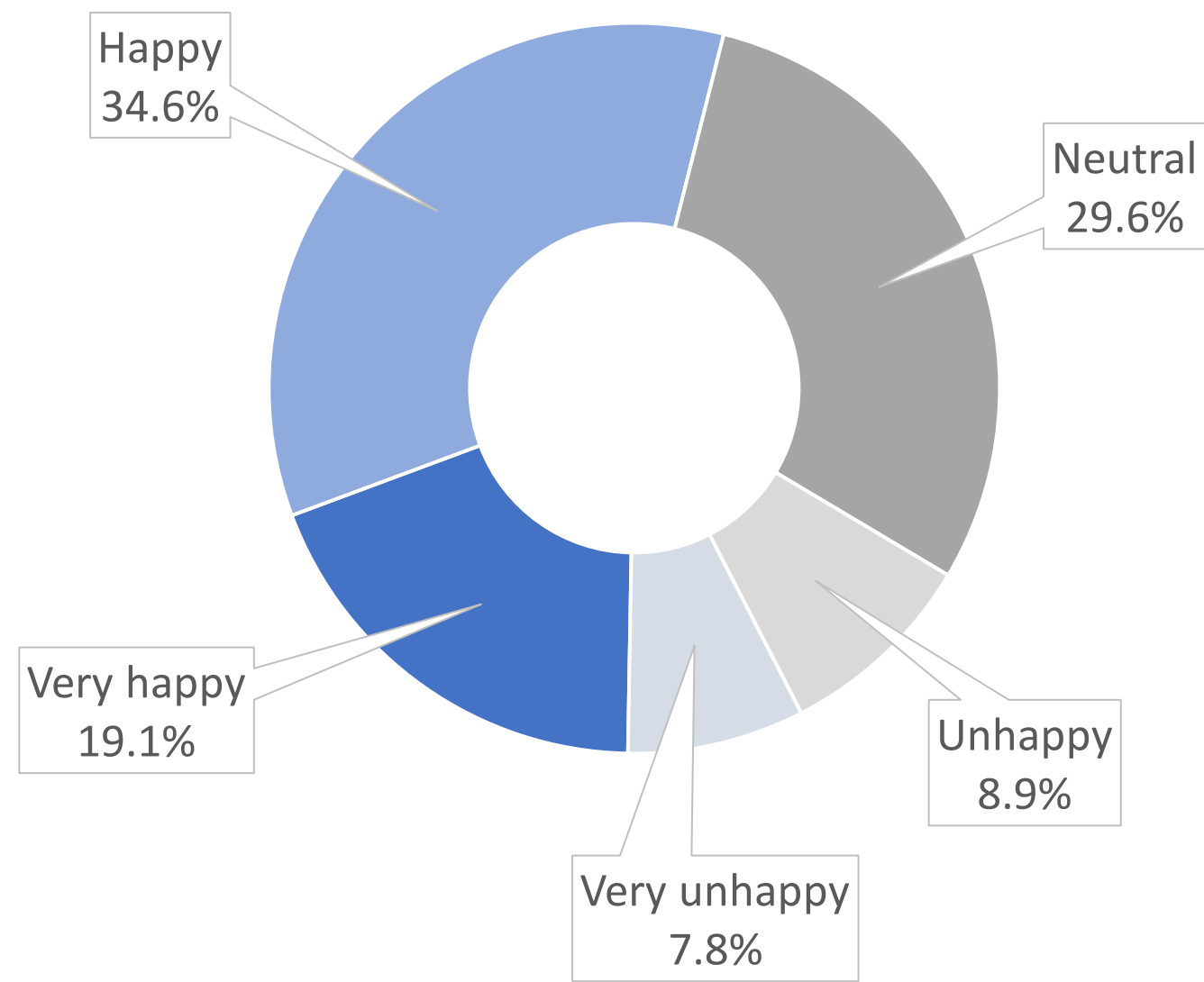
(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Feelings About Seeing Travel Advertisements

Question: Please think about the most recent travel destination advertisement you saw. In general, how did that advertisement make you feel?

Wave 16 (June 26-28)

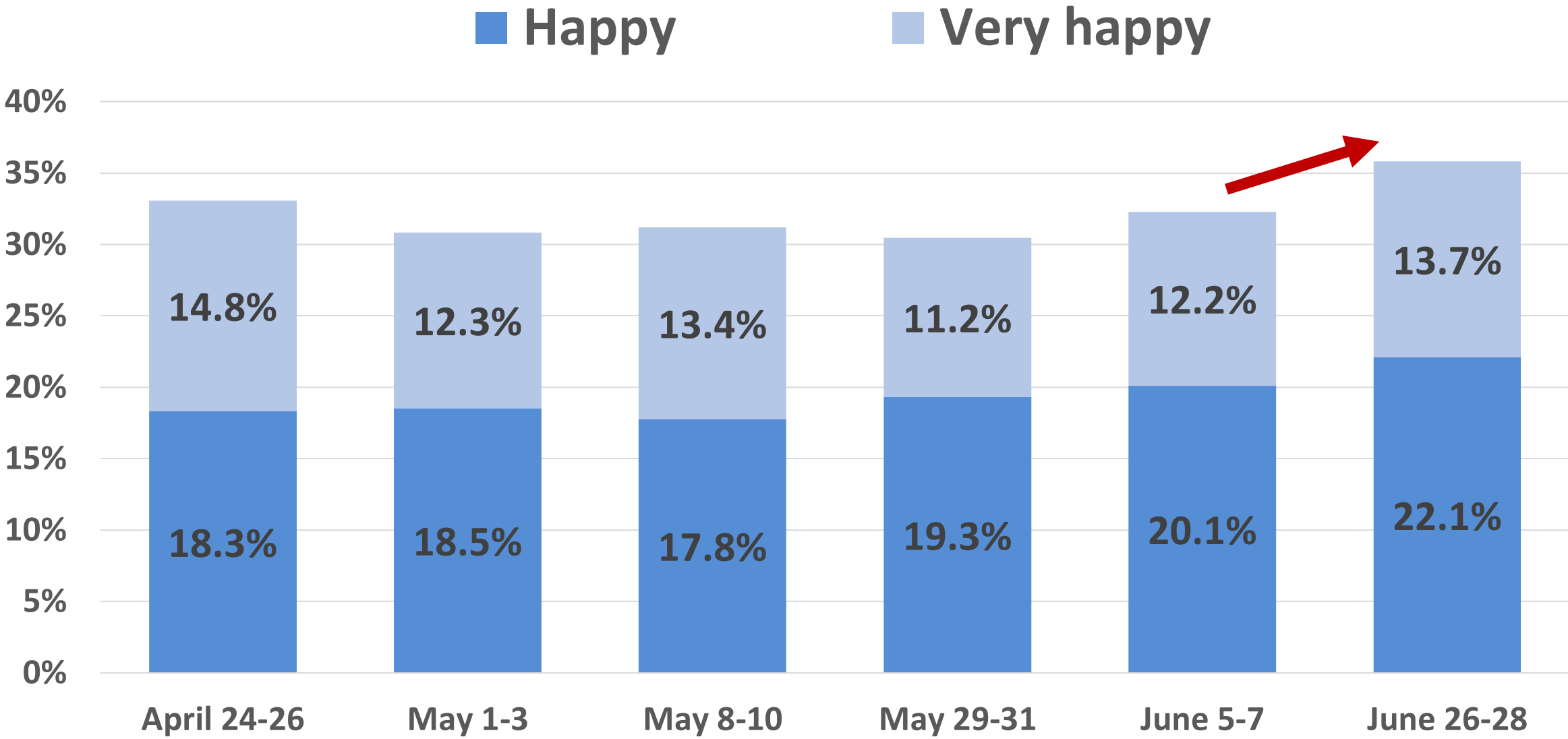
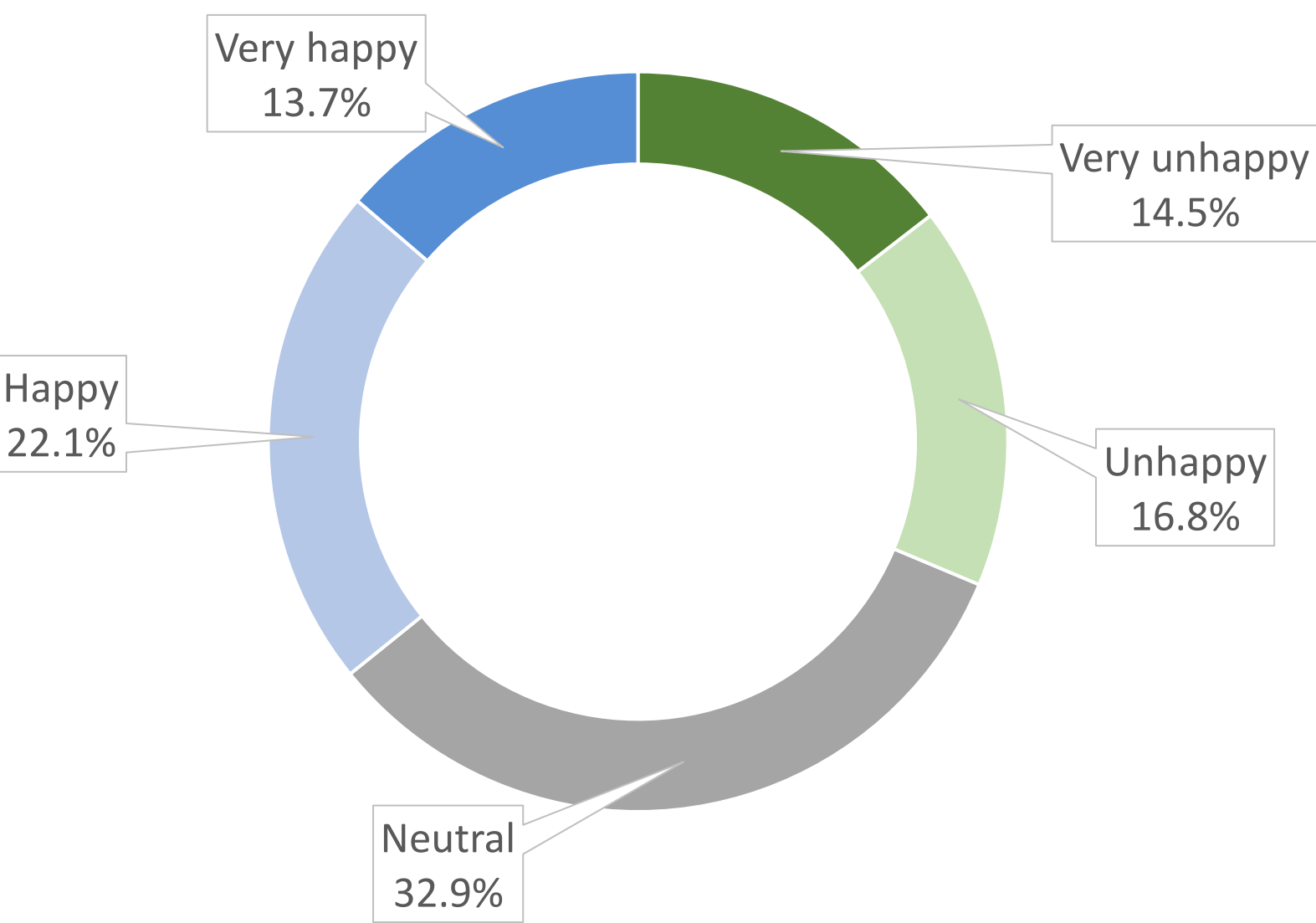


(Base: All respondents, 192 and 274 completed surveys. Data collected May 8-10 and June 26-28, 2020)

Advertisements for Their Own 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?

Wave 16 (June 26-28)

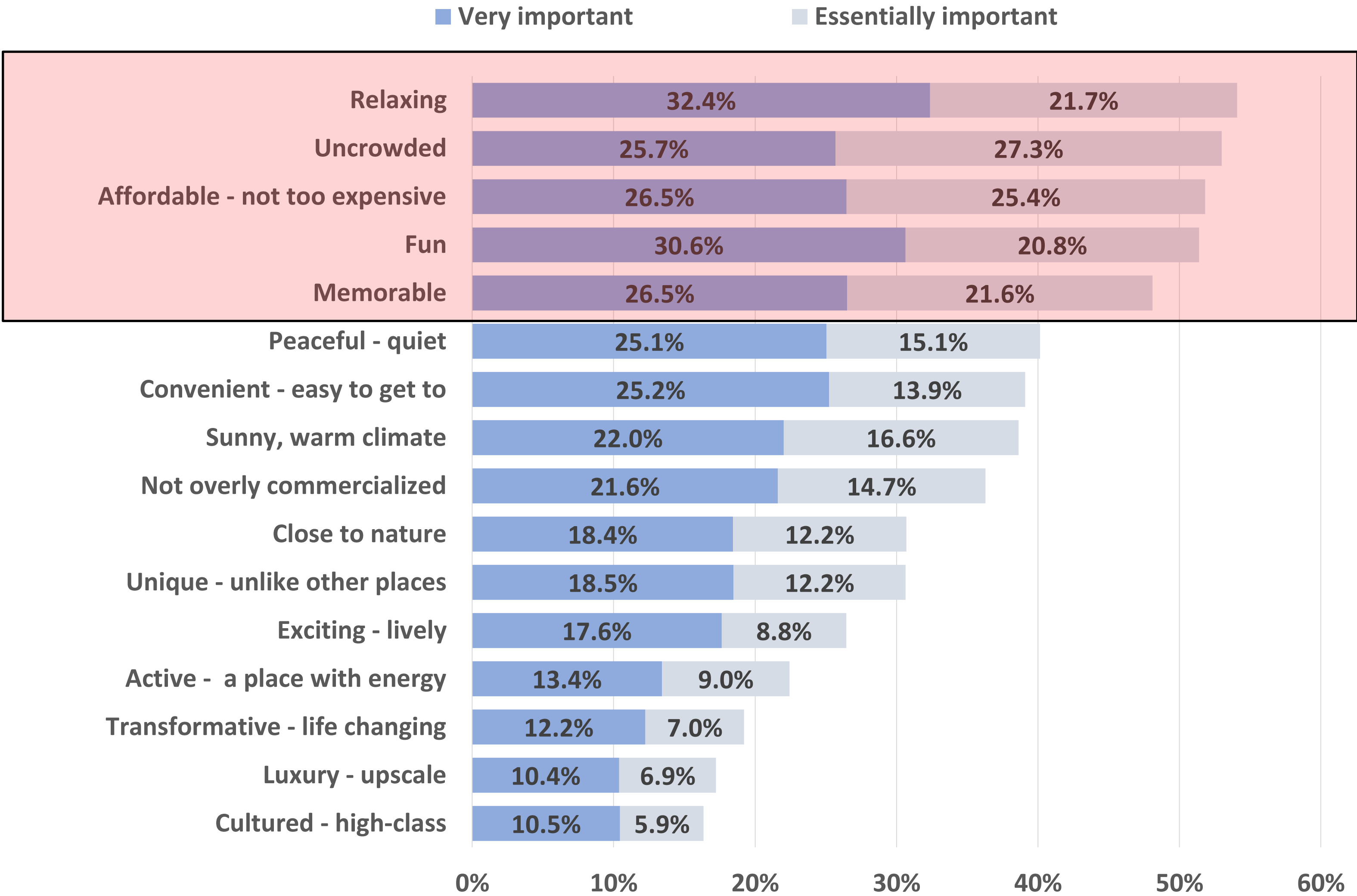


(Base: All respondents, 1,198, 1,199, 1,195, 1,250, 1,203 and 1,231 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7 and 26-28, 2020)

Importance of Destination Attributes

Question: Think about the types of destinations you would most like to visit in the NEXT TWELVE (12) MONTHS. Please tell us how you want the places you visit to be. How important is each attribute?

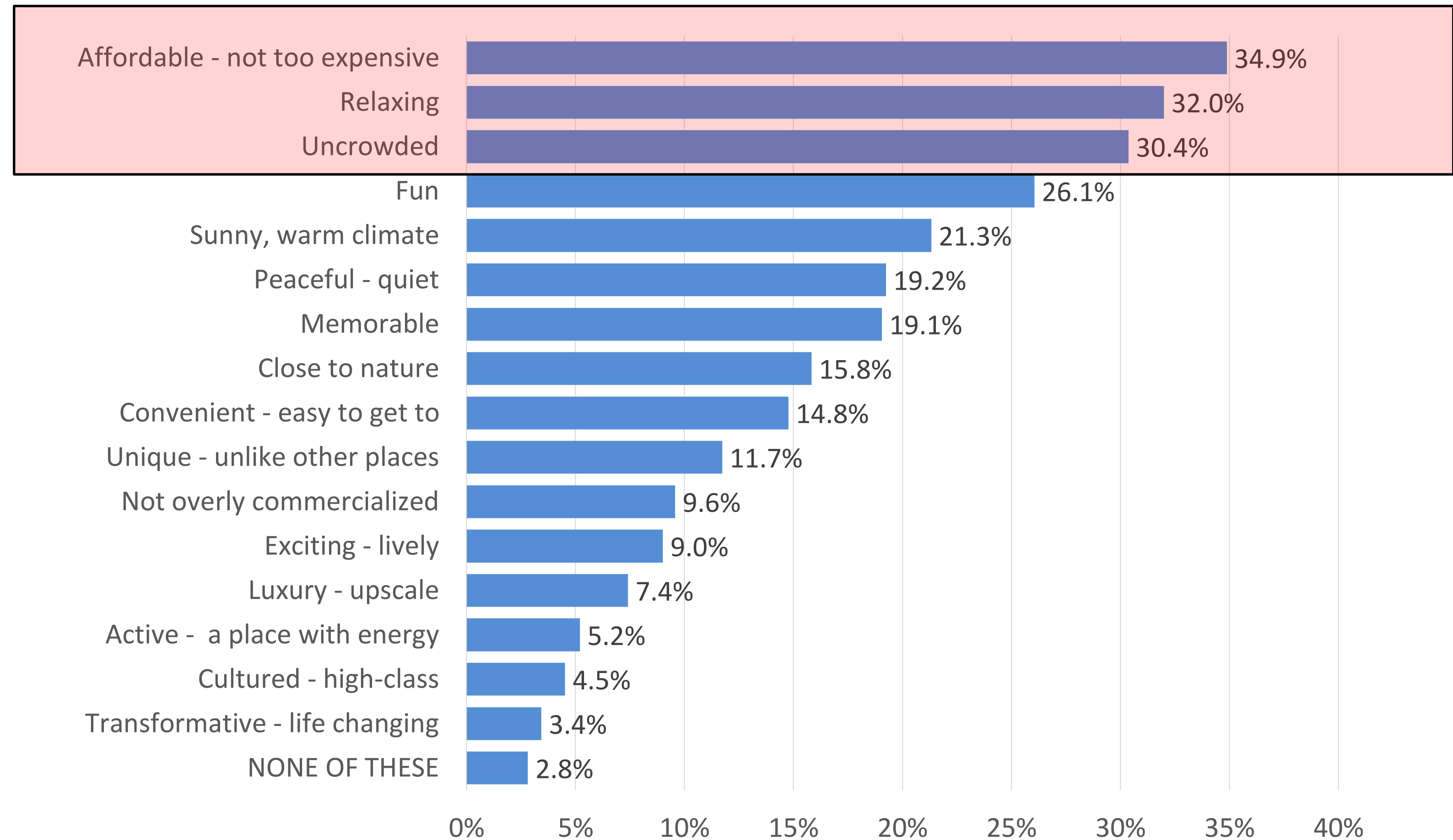
(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Most Important Destination Attributes

Question: Which attributes will be **MOST IMPORTANT** to you in selecting where you visit in the next **TWELVE (12) MONTHS?** (Select as many as 3)

(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



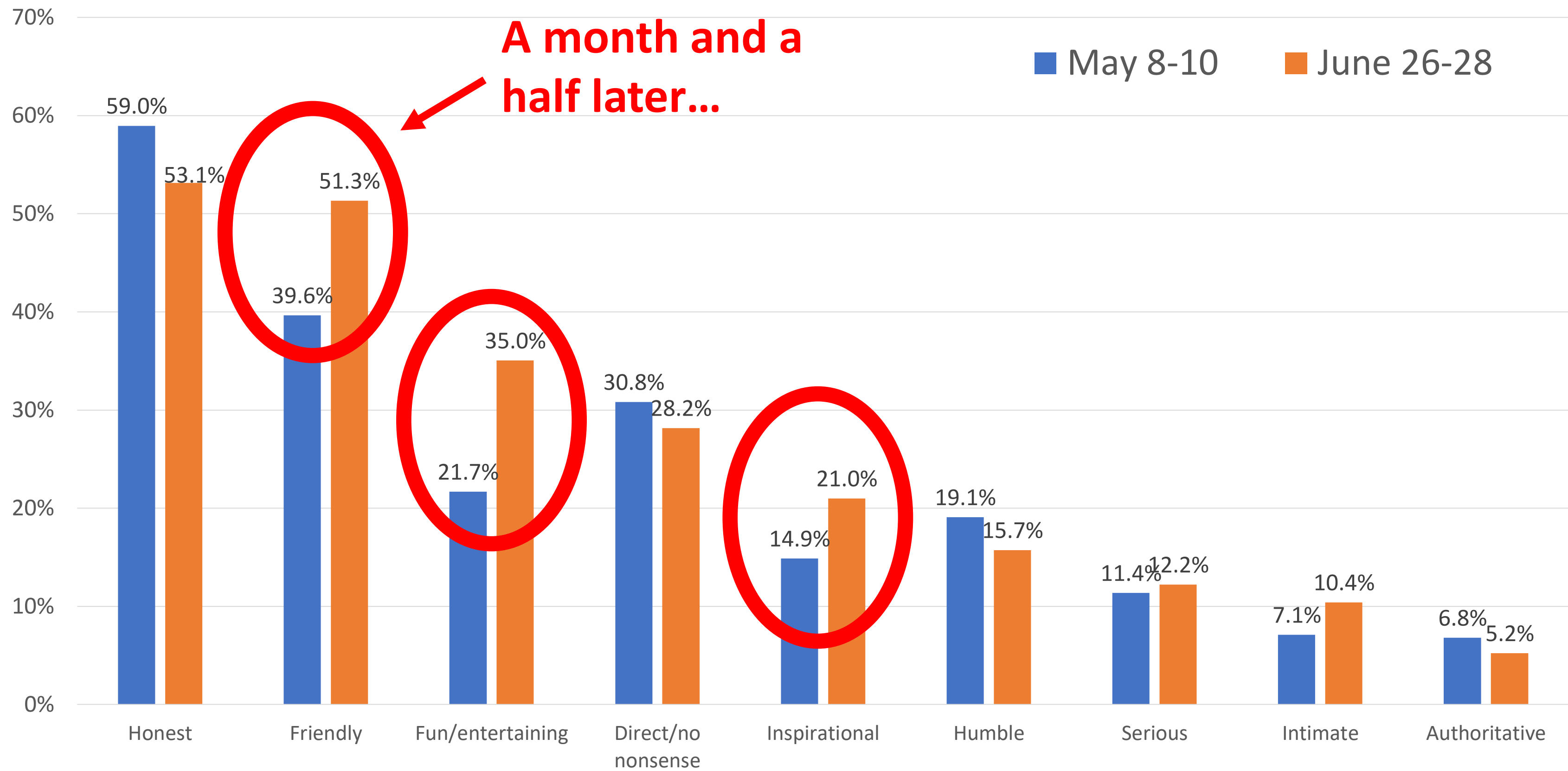
Question: How you would like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now?



Desired Advertising Tones

Question: Think about advertisements for travel destinations. How you would like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now? (Select at most 3)

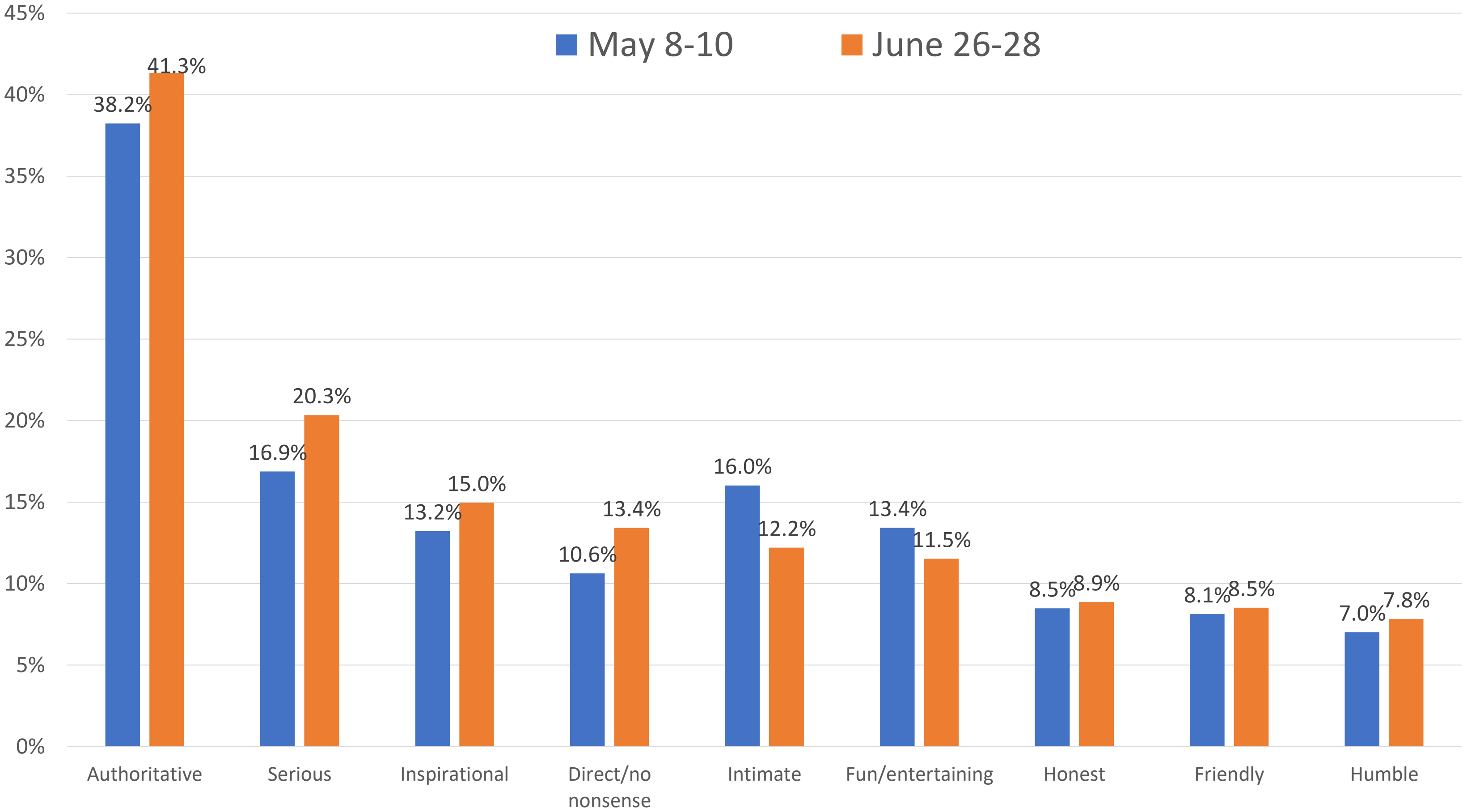
(Base: All respondents, 1,200 and 1,231 completed surveys. Data collected May 8-10 and June 26-28, 2020)



Desired Tones of Advertisements

Question: Would any of these tones (if used by a travel destination) turn you off? (Select any that apply)

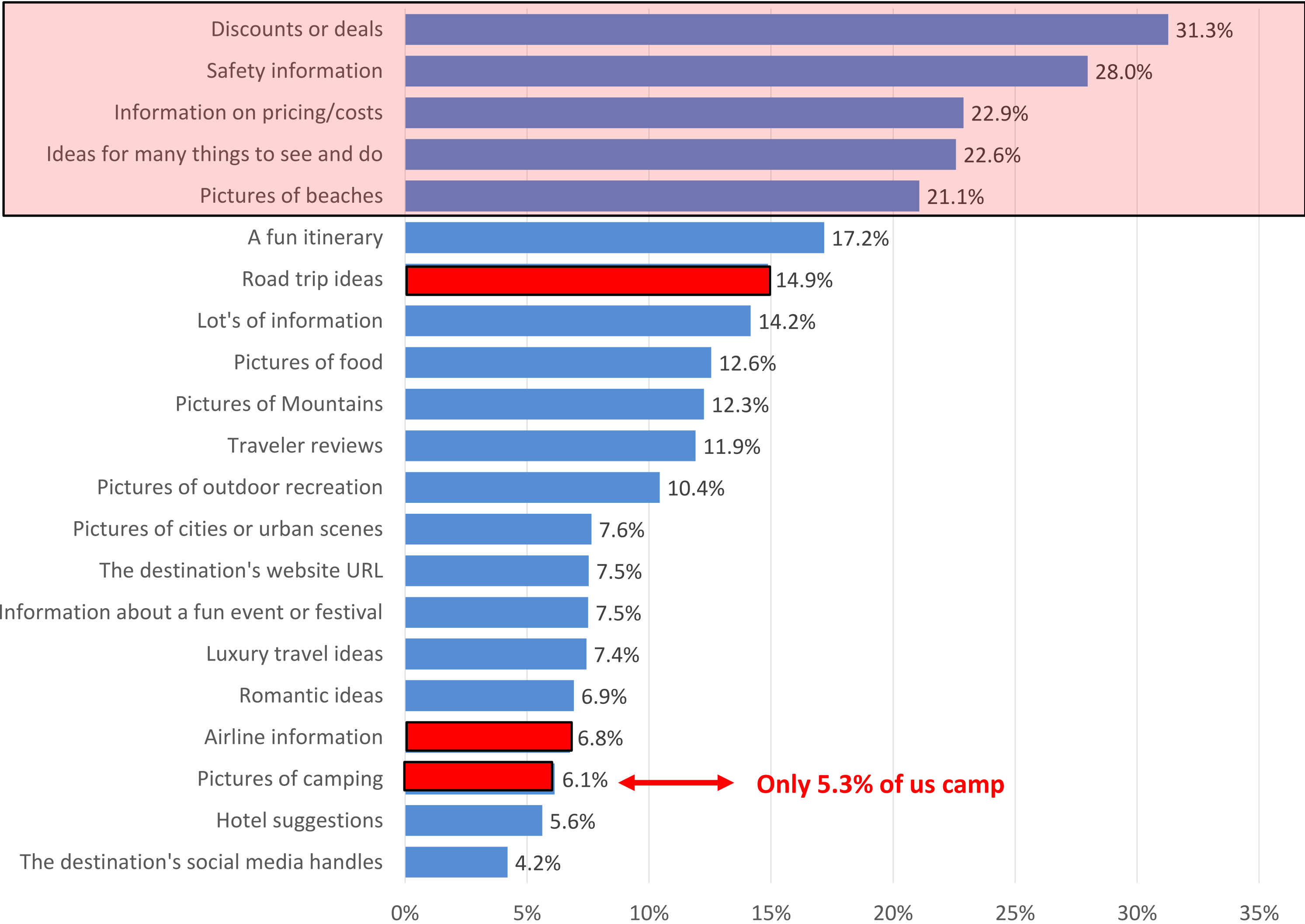
(Base: All respondents, 1,200 and 1,231 completed surveys. Data collected May 8-10 and June 26-28, 2020)



Desired Advertising Content

Question: Build your perfect destination advertisement! Imagine you are designing an advertisement that would get you excited to travel in the next **TWELVE (12) MONTHS**. Which of these would be in the advertisement? **SELECT THE THREE MOST IMPORTANT]**

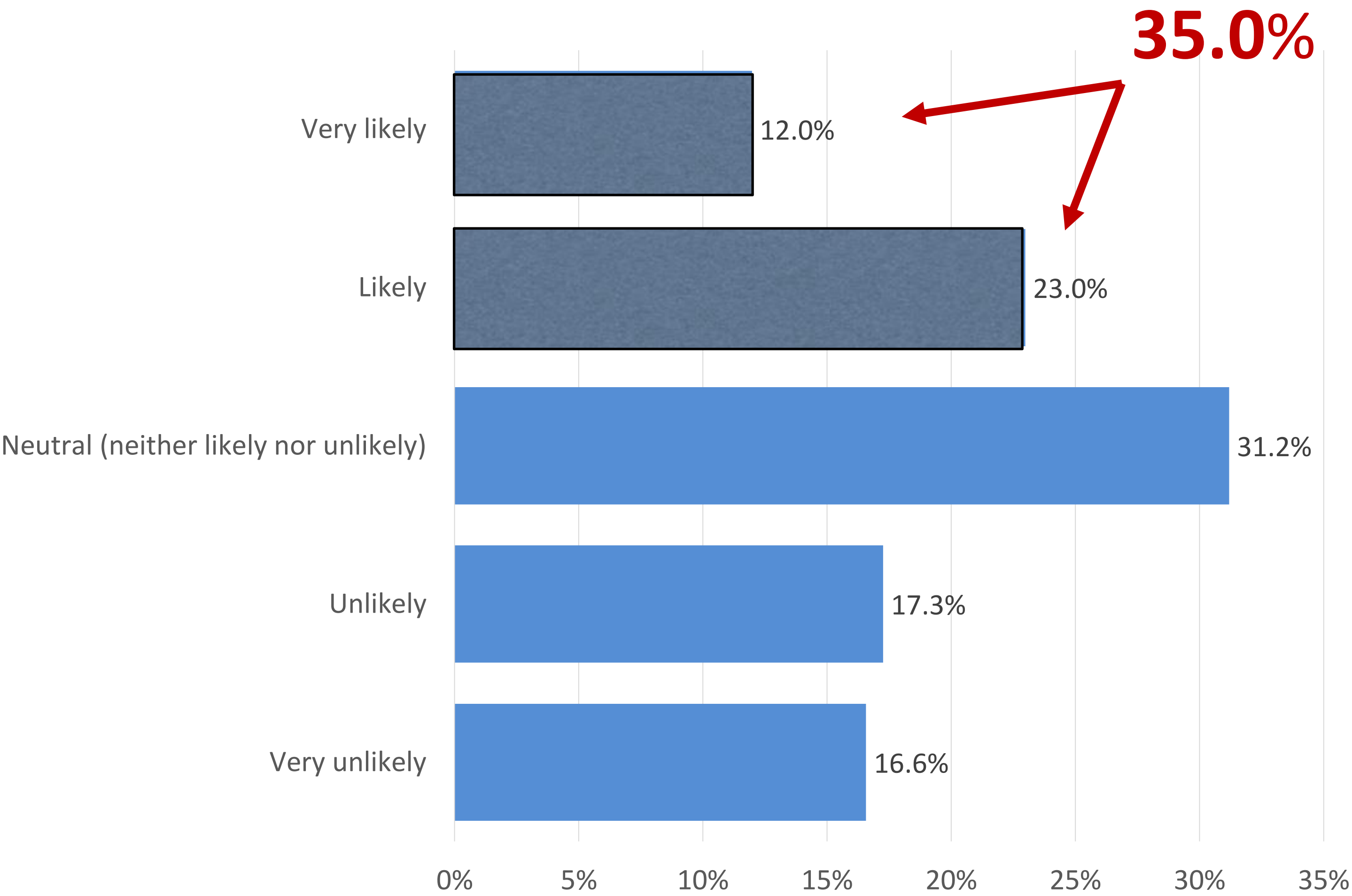
(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



Potential for Near-term Conversion

Question: IN THE NEXT 3 MONTHS, if a good opportunity presented itself, how likely would you be to take a leisure trip THAT YOU HAVEN'T ALREADY CONSIDERED?

(Base: All respondents, 1,231 completed surveys. Data collected June 26-28, 2020)



A person stands on a rocky outcrop, viewed from behind, with their arms outstretched towards a vast landscape. Below them is a vibrant turquoise lake, and in the distance, majestic mountains are covered in snow under a bright blue sky with scattered white clouds.

Americans Open to Travel Influence (Next 3 Months)

- **On every metric they are far less fearful of traveling right now.**
 - **Far less concerned about safety from COVID**
 - **Less nervous about travel activities**
 - **Much more comfortable going out in their communities (66.3% vs. 20.8%)**
 - **Far less likely to feel they need more time before they are ready to travel (19.5% vs. 69.3%)**
 - **Less reluctant to travel too far from home (28.4% vs. 54.6%)**



Americans Open to Travel Influence (Next 3 Months)

- Less concern about pandemic control protocols in their communities.

In my community, too many people are not wearing face masks in public.

-22%

(Less likely to agree)

In my community, too many people are NOT maintaining appropriate social distancing when in public.

-24%

(Less likely to agree)

Americans Open to Travel Influence (Next 3 Months)

- They have a different profile in terms of the types of destination attributes they're looking for:

Destination Attributes They Want Now

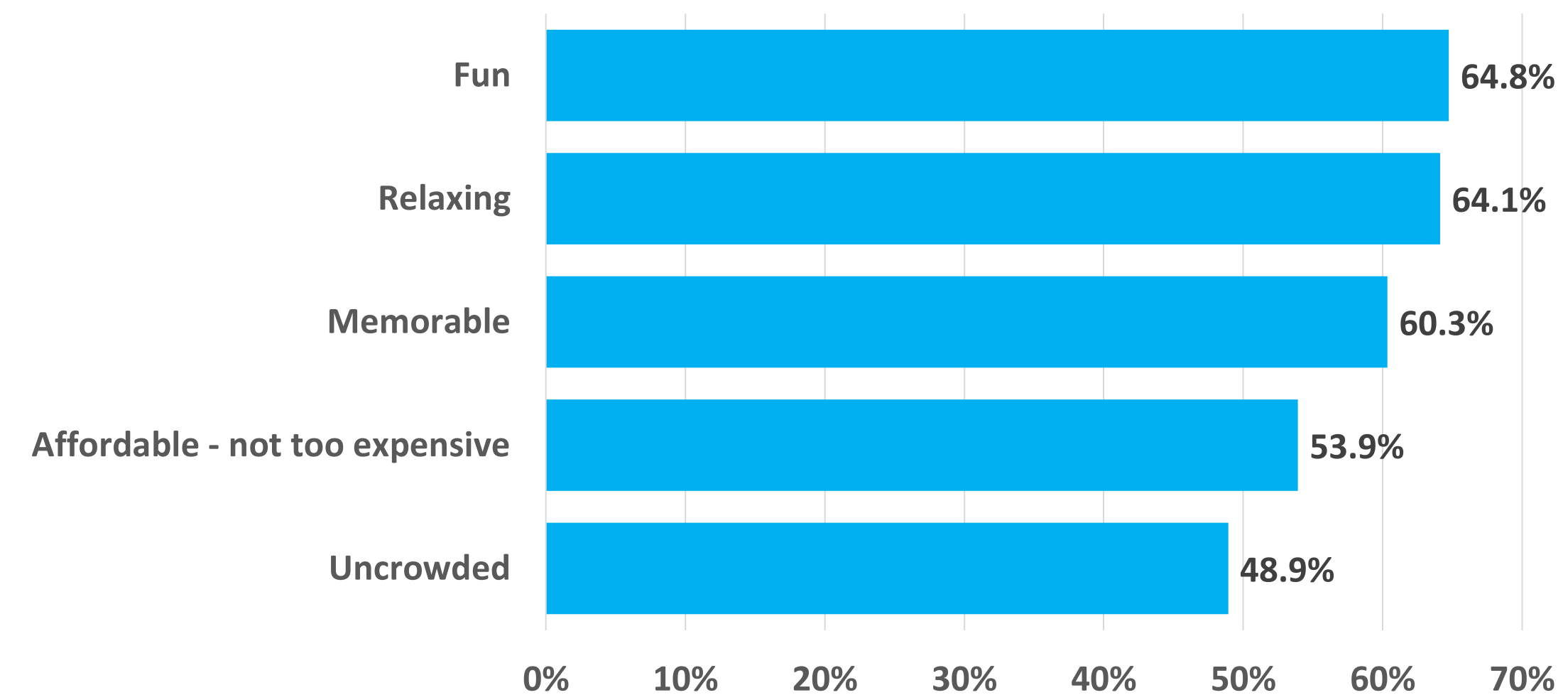


Chart shows Top 2 Box Score

Americans Open to Travel Influence (Next 3 Months)

- More interest in fun, memorable exciting experiences.
Less concerned about crowding

Much More Interest in Fun and Excitement

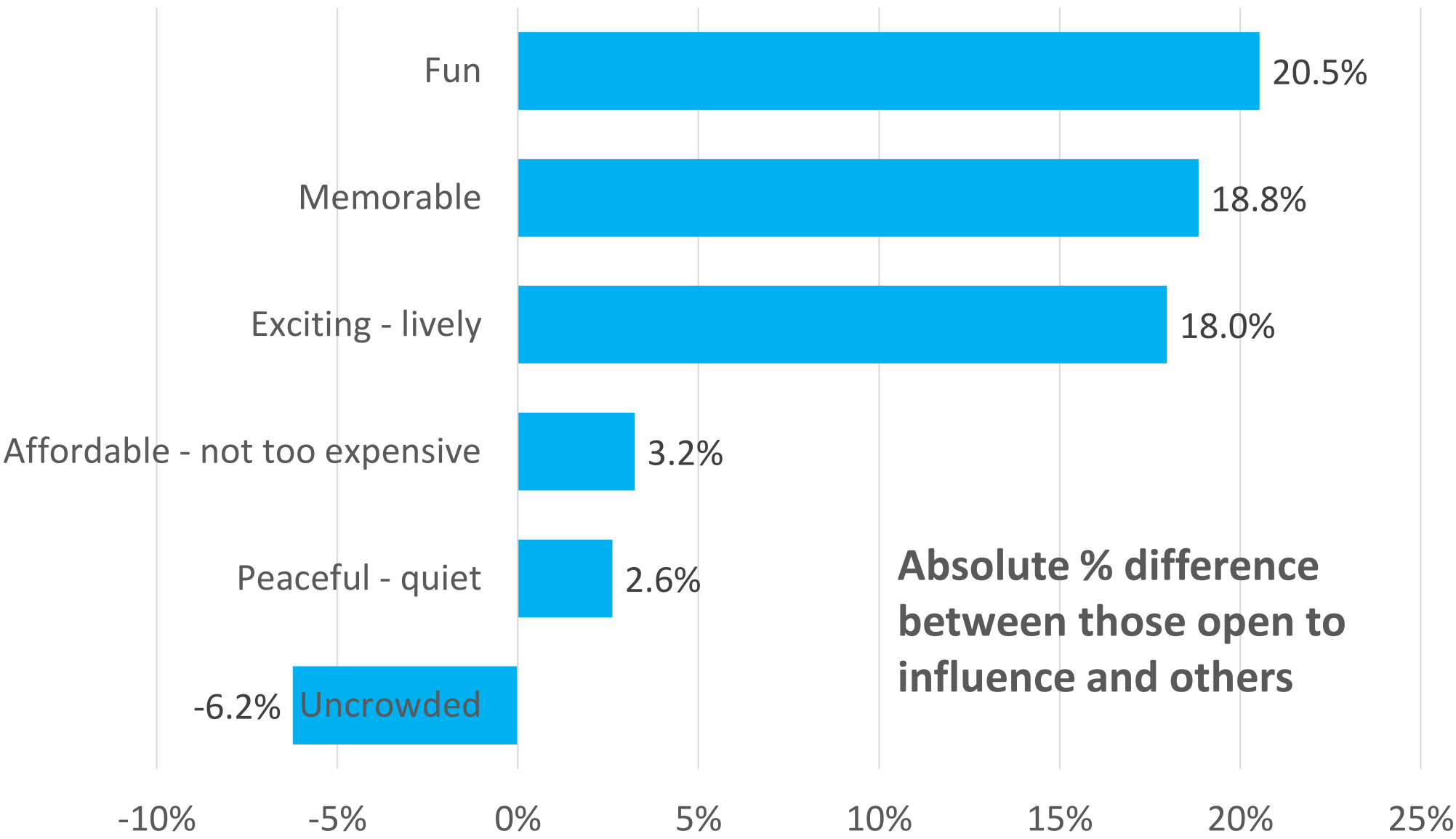


Chart shows difference Between Top 2 Box Scores



Americans Open to Travel Influence

(Next 3 Months)

- **Demographically speaking:**
 - **More likely to be male**
 - **Far more likely to be Millennials**
 - **Slightly higher average household incomes**
 - **Less likely to identify as LGBTQ**
- **Similar in educational achievement and residential location (urban, suburban, rural)**

In short:

“Americans who are open to travel influence see the world through different eyes than the majority that is not yet ready. They’re significantly less fearful and they’re ready to get out and have some fun. Destination marketers will need to somehow balance these two world views moving forward.”





Coronavirus Travel Sentiment Index

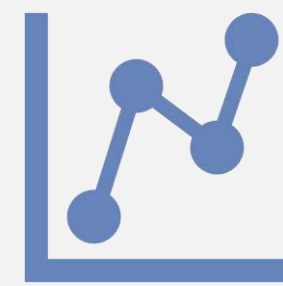
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 28th

What is a Predictive Index?



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



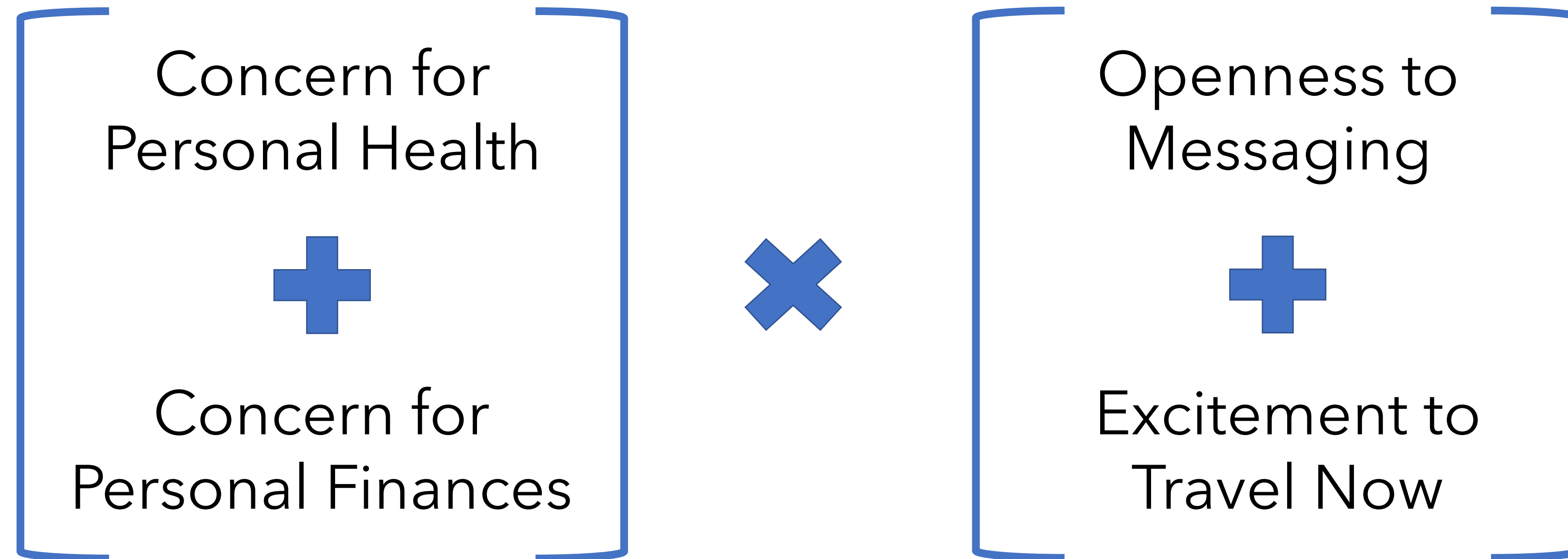
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

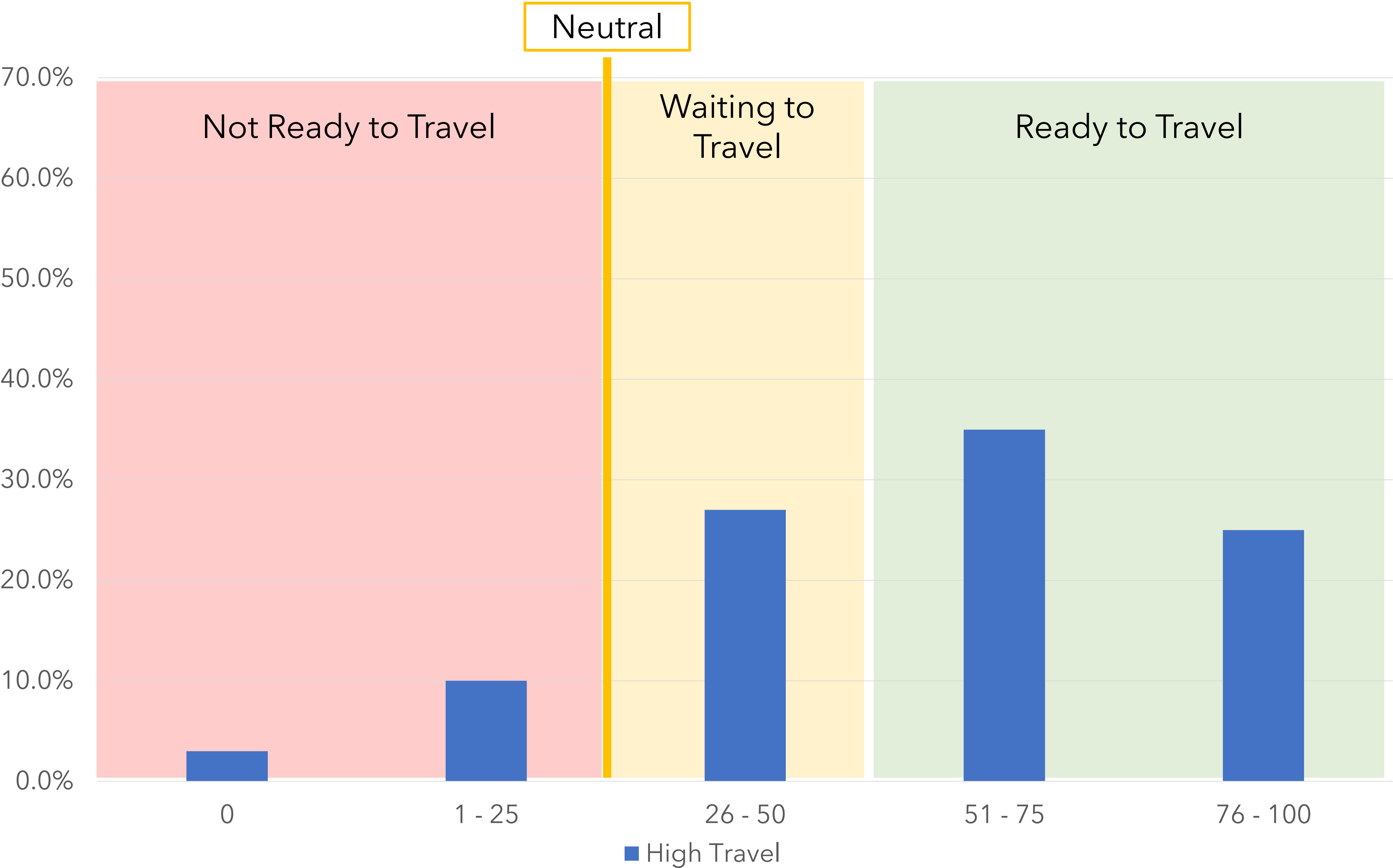
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



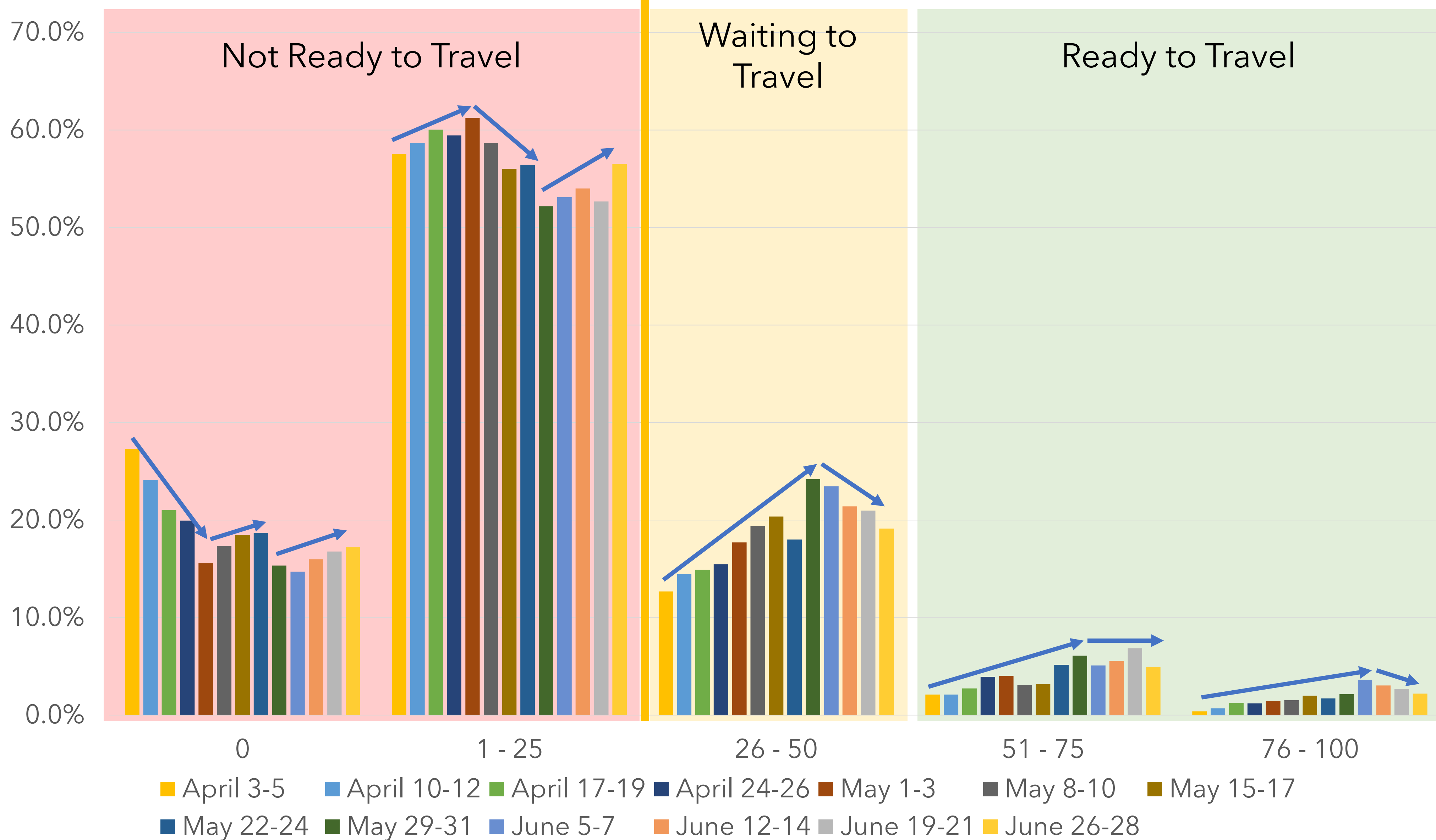
*Normalized to a 100pt scale

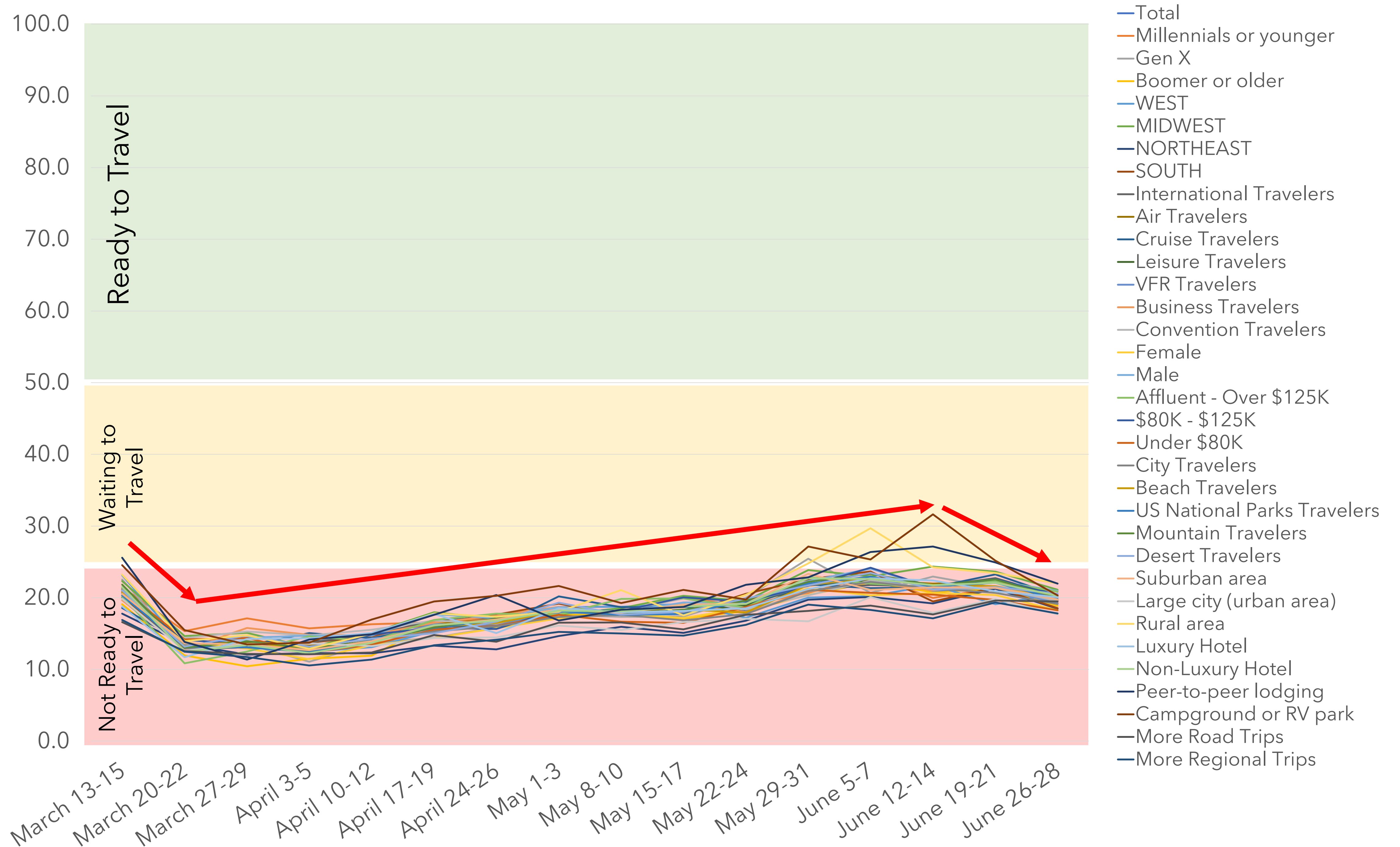
Healthy Travel Outlook



Travel Outlook

Neutral

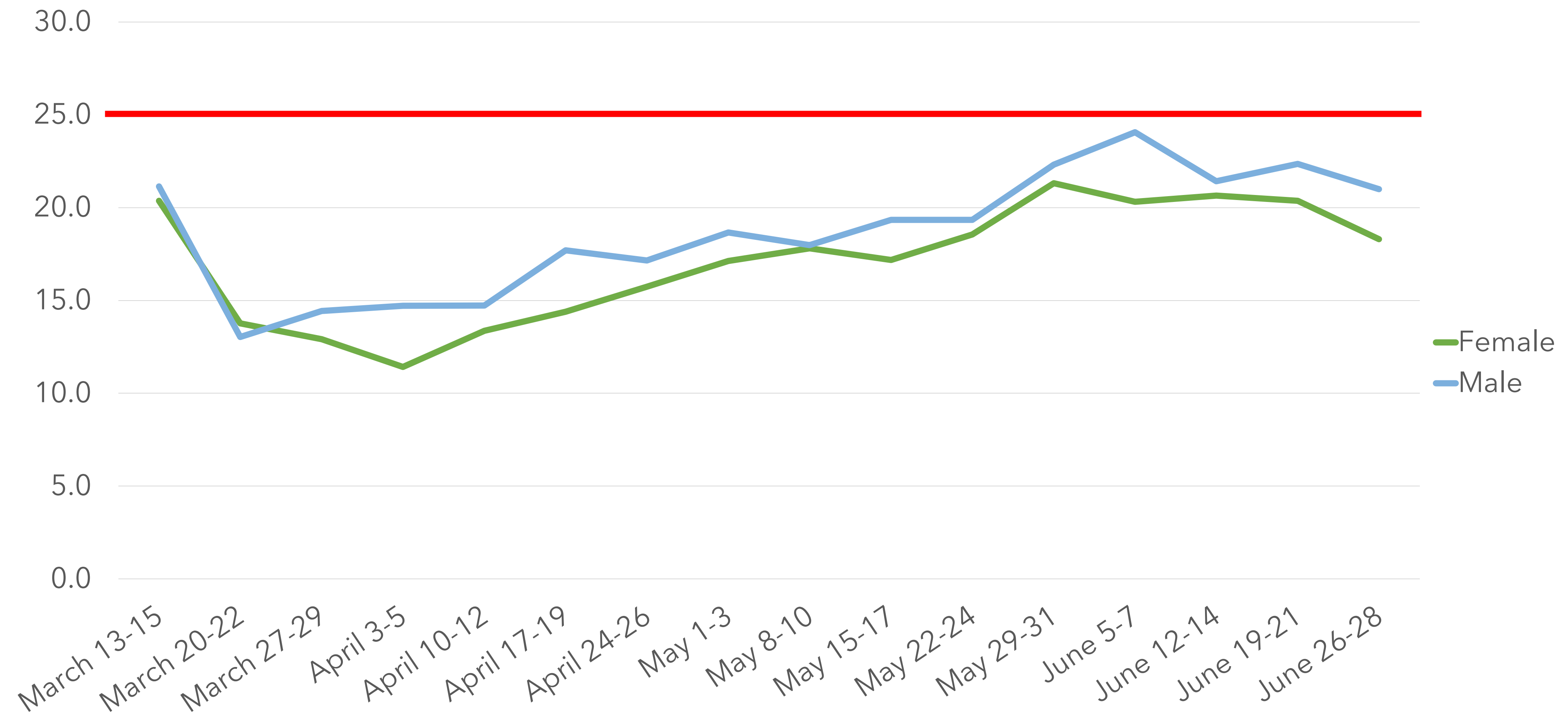




Gender

Points of Interest:

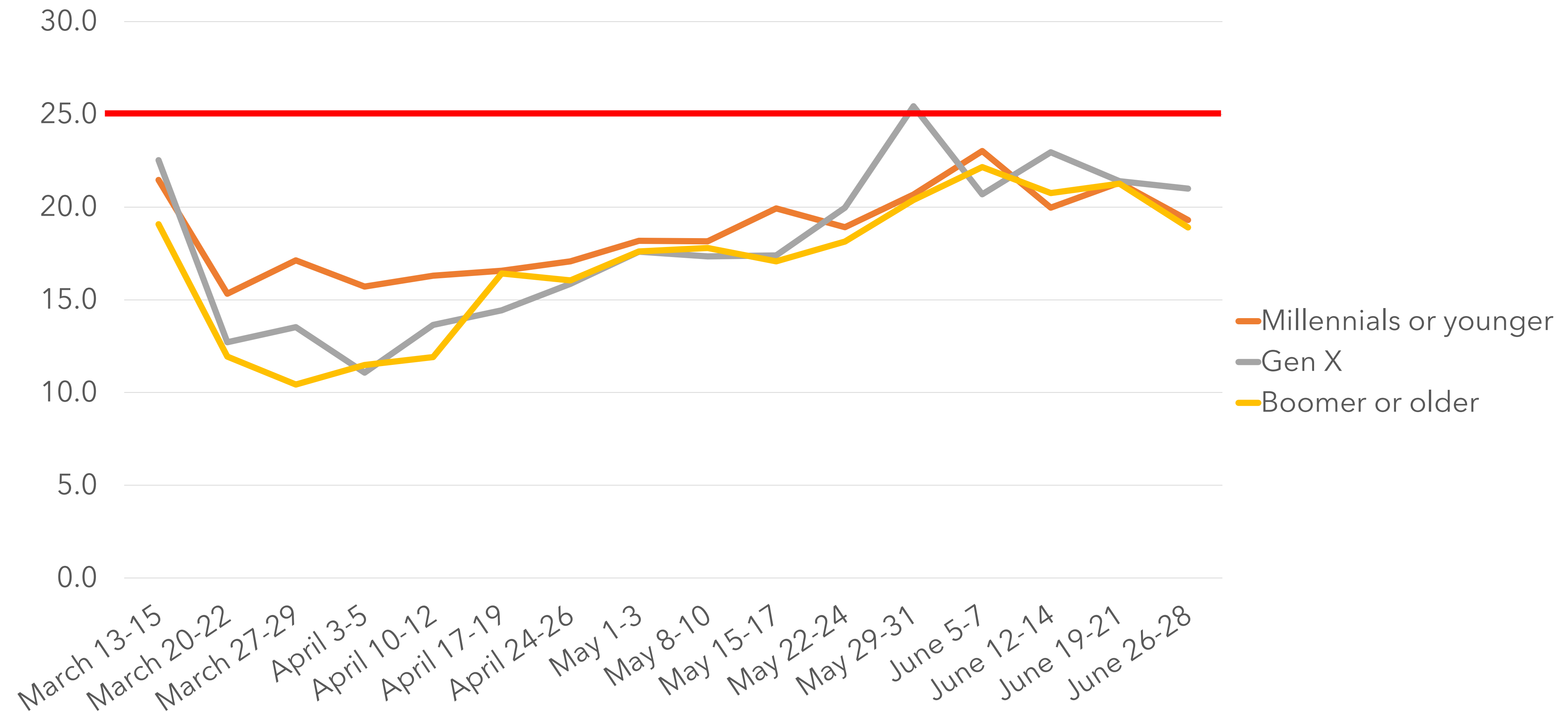
- Safety concerns increased for both Men and Women this week, Women continuing to report higher levels of concern than Men.
- This week 42.3 percent of Women reported they have no plans to travel in 2020 (up from 35.5% last week).
- However, Women and Men this week show similar levels of excitement to travel and openness to travel messaging.



Generation

Points of Interest:

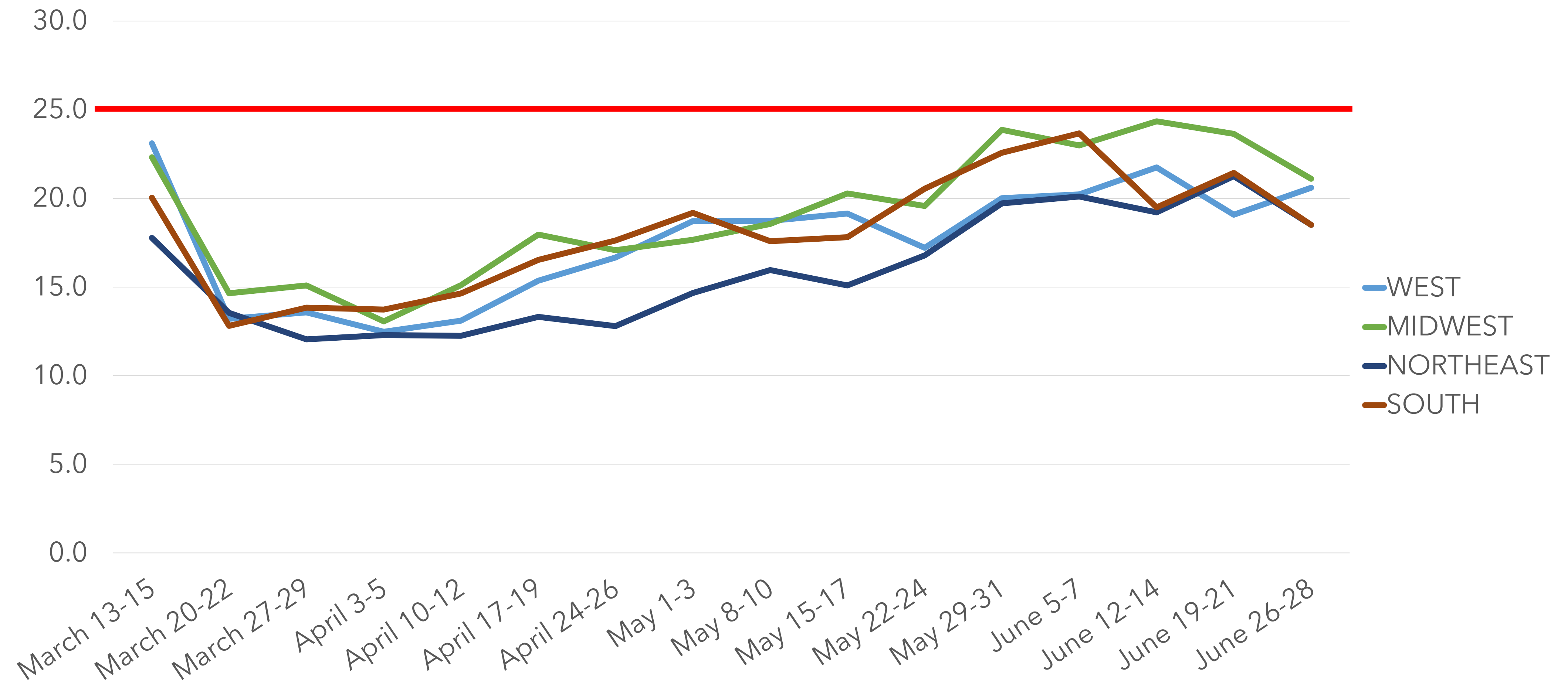
- Gen X indexed higher than the other generations this week by a relatively small margin.
- All generations showed increases in safety concerns this week, Millennials and Boomers showing relatively larger increases.



US Region

Points of Interest:

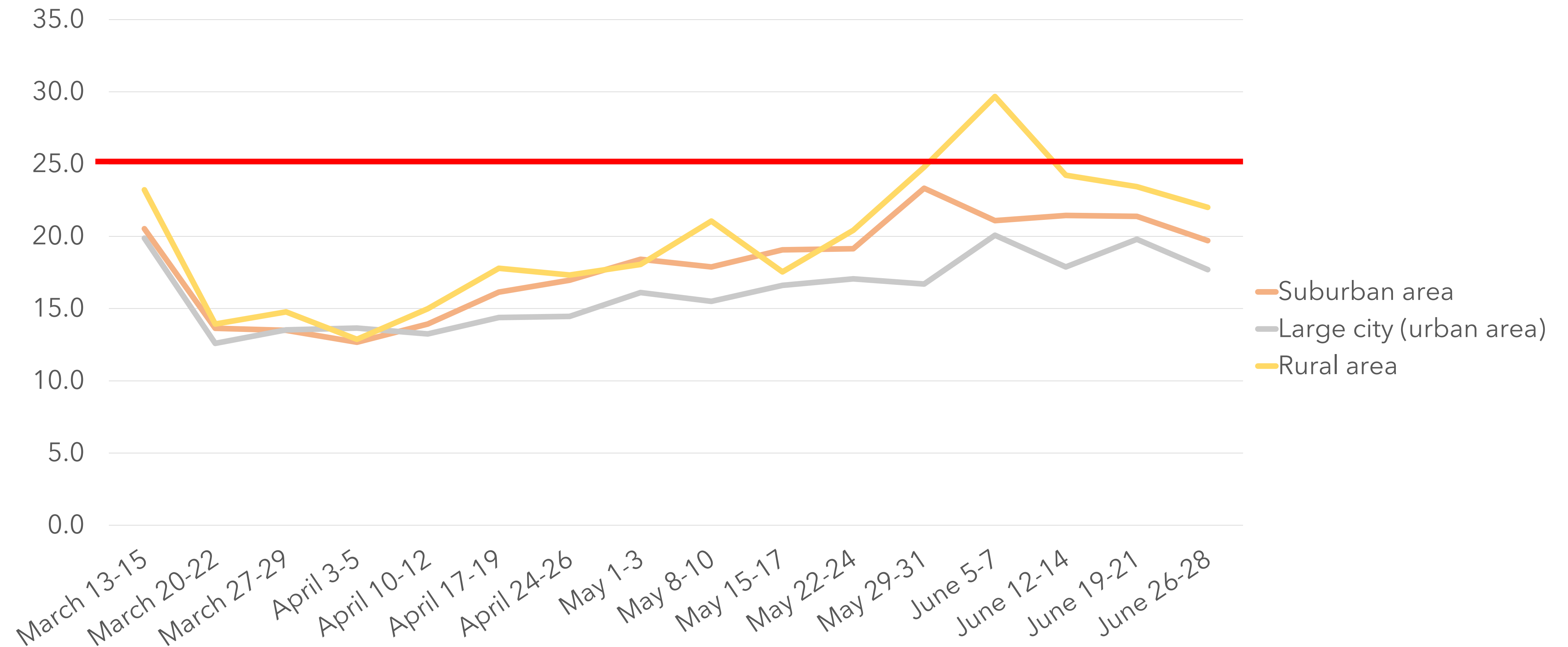
- The Midwest continued to index highest amongst US regions this week and the Northeast and South regions were relatively lowest.
- All regions except the West this week reported increases in safety concerns.
- The Northeast and South were the US regions that showed the relatively strongest support for 14-day quarantine policies.



Type Of Residence

Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural respondents reported decreasing safety concerns this week, while concerns among Urban and Suburban respondents continue to rise week over week.
- Large City-Urban respondents reported they would feel happiest to see advertisements promoting their communities.





KEY TAKEAWAYS

- After many weeks of significant index improvements, the tide has turned.
- In the past two weeks, the predictive indices have turned to the negative.

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 on social media



Specific Insights into Your Destination

Brand Performance + Key Audiences for Conversion

15-minute presentations for your board and stakeholders

info@destinationanalysts.com



Resources for Tourism Advocacy & Recovery

destinationanalysts.com

ROI

THIS YEAR ▼ 32.8876
▲ 42.9841

First quarter
Jan-Mar

Second quarter
Apr-Jun

Third quarter
Jul-Sep





Now + Upcoming for You

- Meeting Planner Sentiment Survey Findings
- International Sentiment
- Online Focus Groups with Travelers
- Traveler Segment Profiles

We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

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