



Coronavirus Travel Sentiment Index

Presentation of Findings
Week of June 14th

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.

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

THANK YOU
so much to our clients and partners who have

problematic statistical
report method

Survey result
analysis select
question
examine

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 14 data (fielded June 12th-14th) 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





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.

National

At least 113,000 people have died from coronavirus in the U.S.

At least **2,074,000** cases have been reported.

yahoo!
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Fears of second U.S. coronavirus wave rise on worrisome spike in cases, hospitalizations

REUTERS Lisa Shumaker and Carl O'Donnell and
Michael Erman
Reuters June 11, 2020



By Lisa Shumaker, Carl O'Donnell and Michael Erman

June 11 (Reuters) - About half a dozen states including Texas and Arizona are grappling with a rising number of coronavirus patients filling hospital beds, fanning concerns that the reopening of the U.S. economy may spark a second wave of infections.

Miami Herald

CORONAVIRUS

Florida's number of confirmed new COVID-19 cases exceeds 2,000 for second day in a row

BY DAVID J. NEAL

JUNE 14, 2020 12:49 PM



During a press event at UM on Friday, June 12, 2020, Gov. Ron DeSantis in Florida, one day after the state's previous record. BY EMILY MICHOT

NY Sees Lowest Coronavirus Death Toll Since Pandemic Peak: Cuomo

asked about the record

Patch Maya Kaufman, Patch • June 14, 2020



NEW YORK — New York saw its lowest daily death toll from COVID-19 since the peak of the state's coronavirus pandemic, Gov. Andrew Cuomo announced Sunday.

A man wearing a straw hat, sunglasses, and a blue and white striped shirt is smiling and making an 'OK' hand gesture. He is carrying a brown suitcase over his shoulder. The background is a solid olive green color.

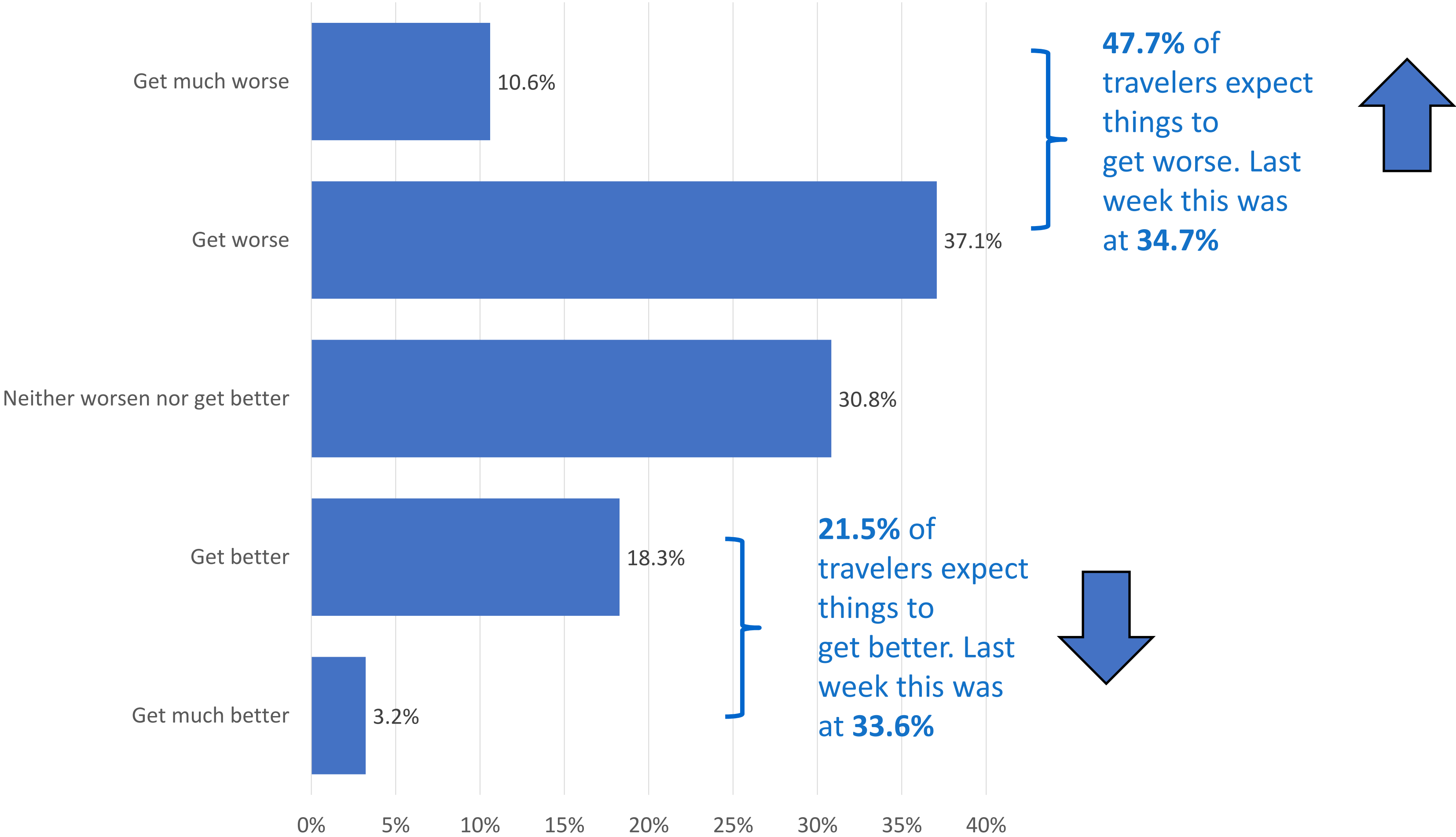
How Safe Do We Feel to Travel?

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, 1,214 completed surveys. Data collected June 12-14, 2020)

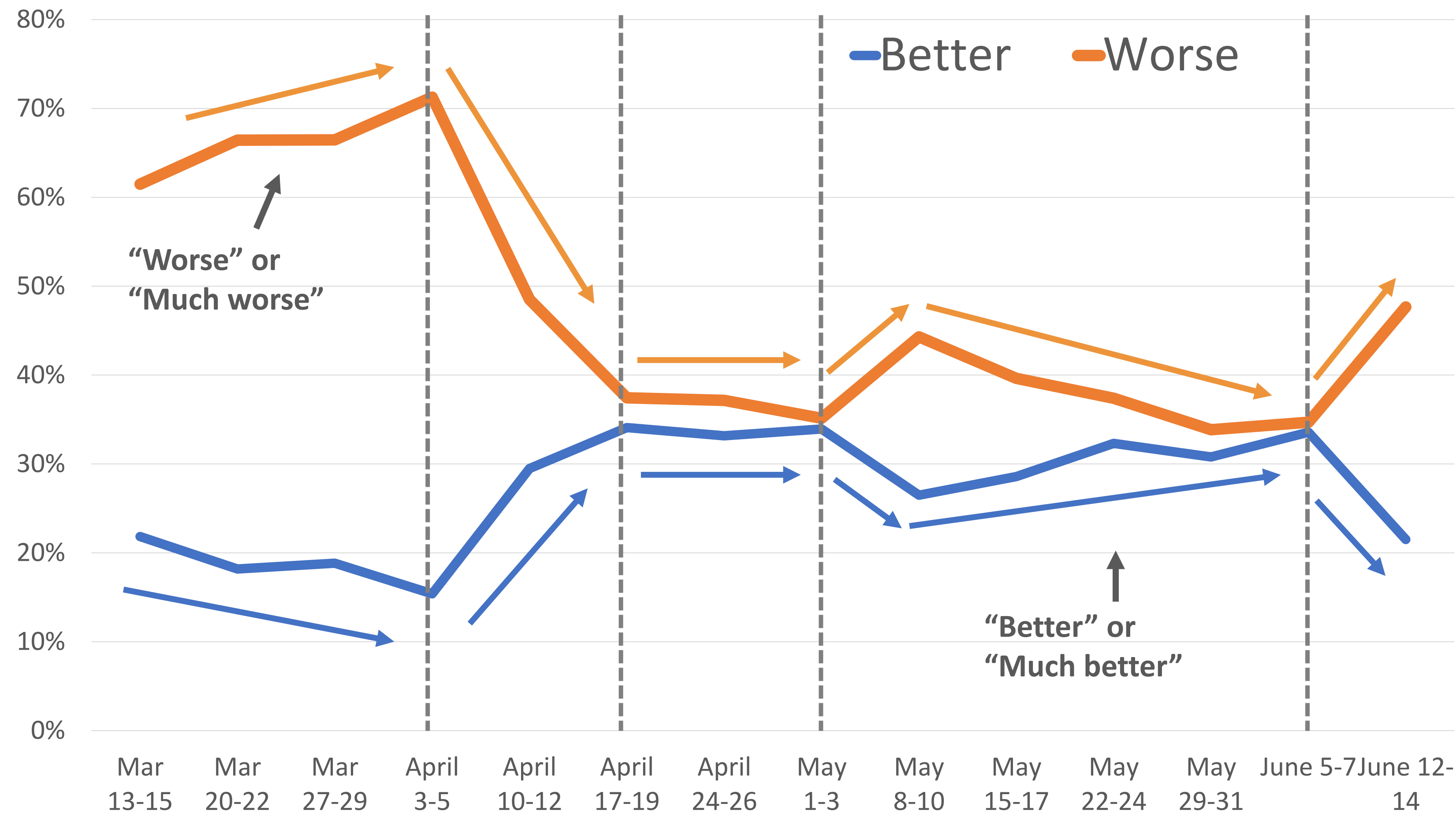


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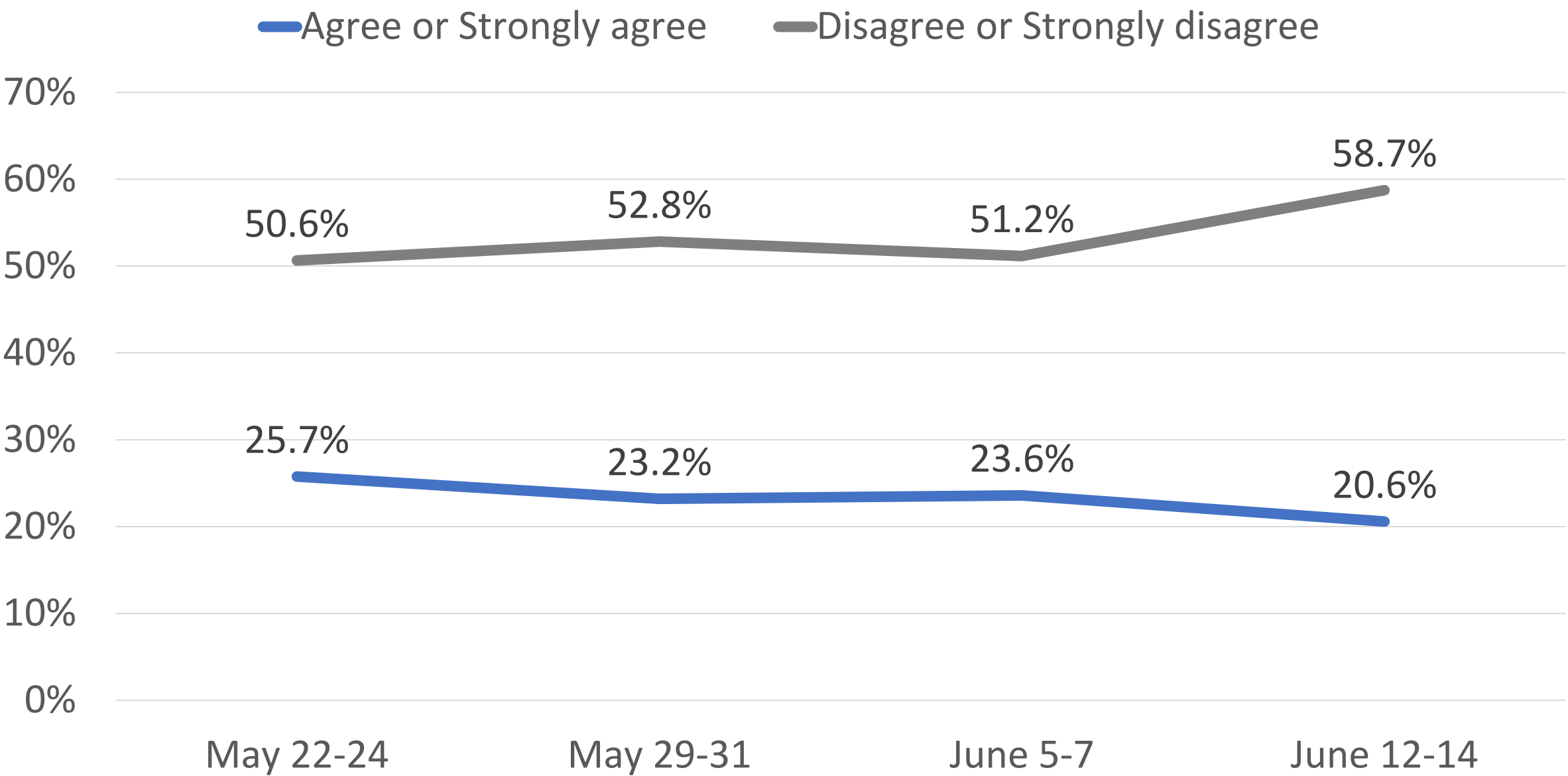
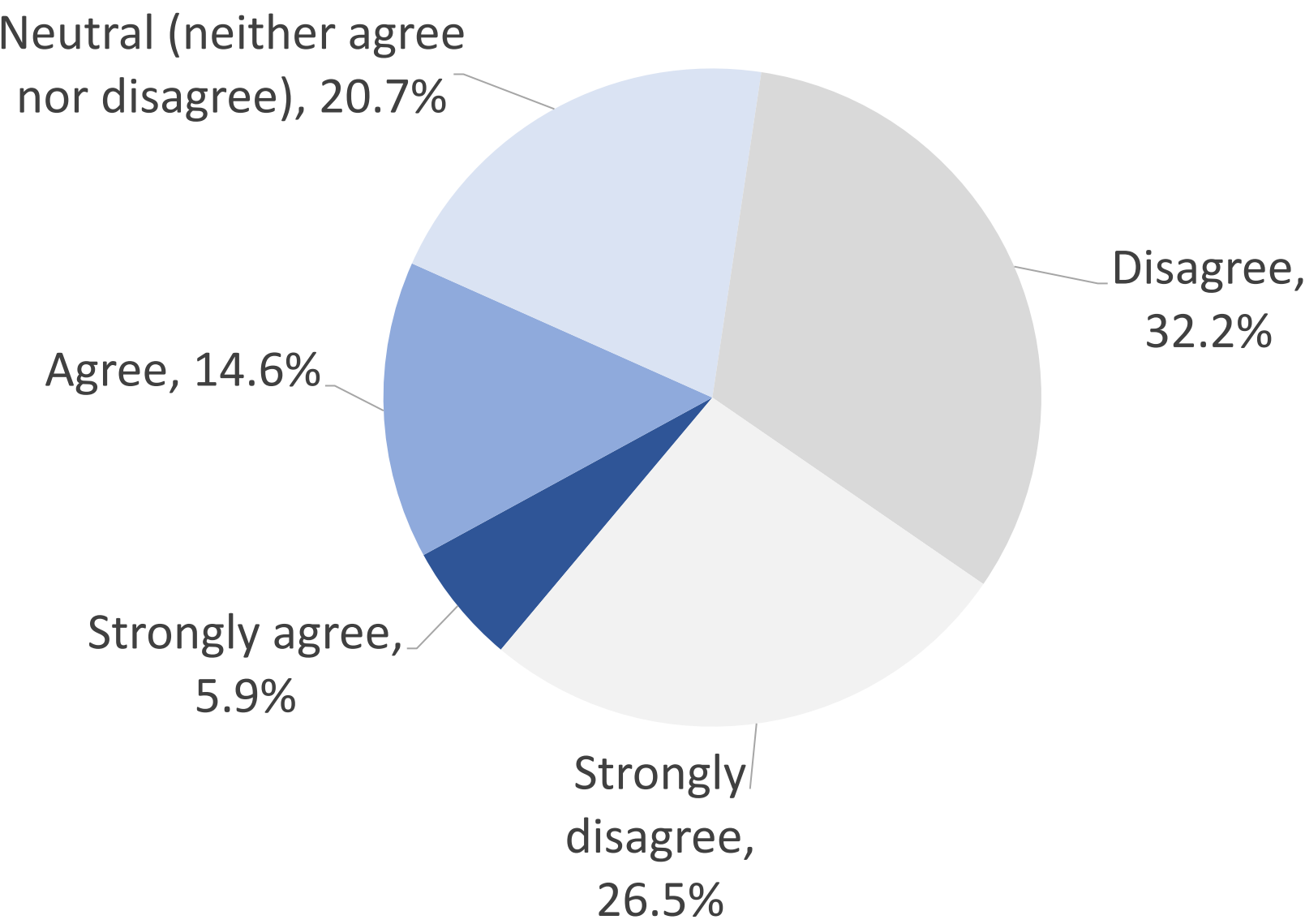
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14 2020)



Expectations for Fall

How much do you agree with the following statement?

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

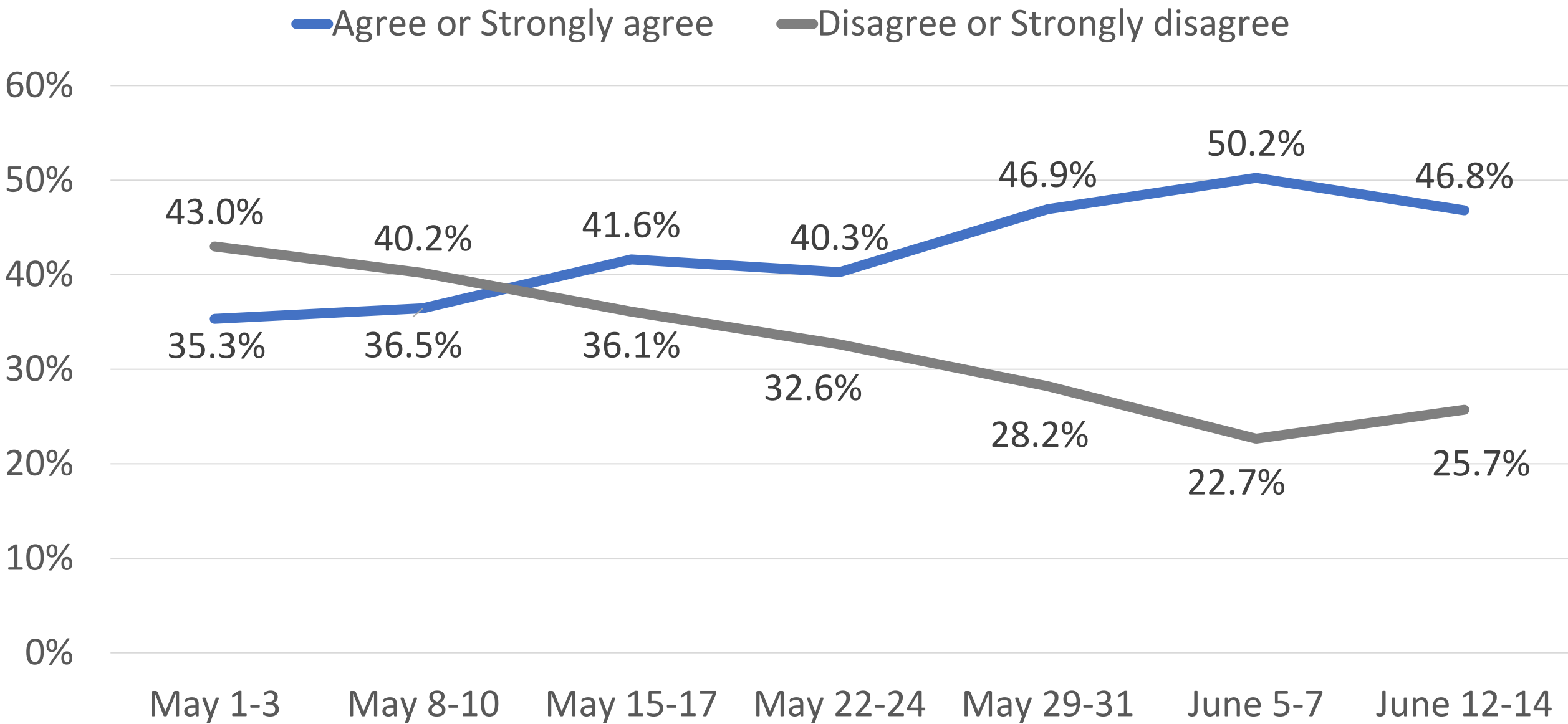
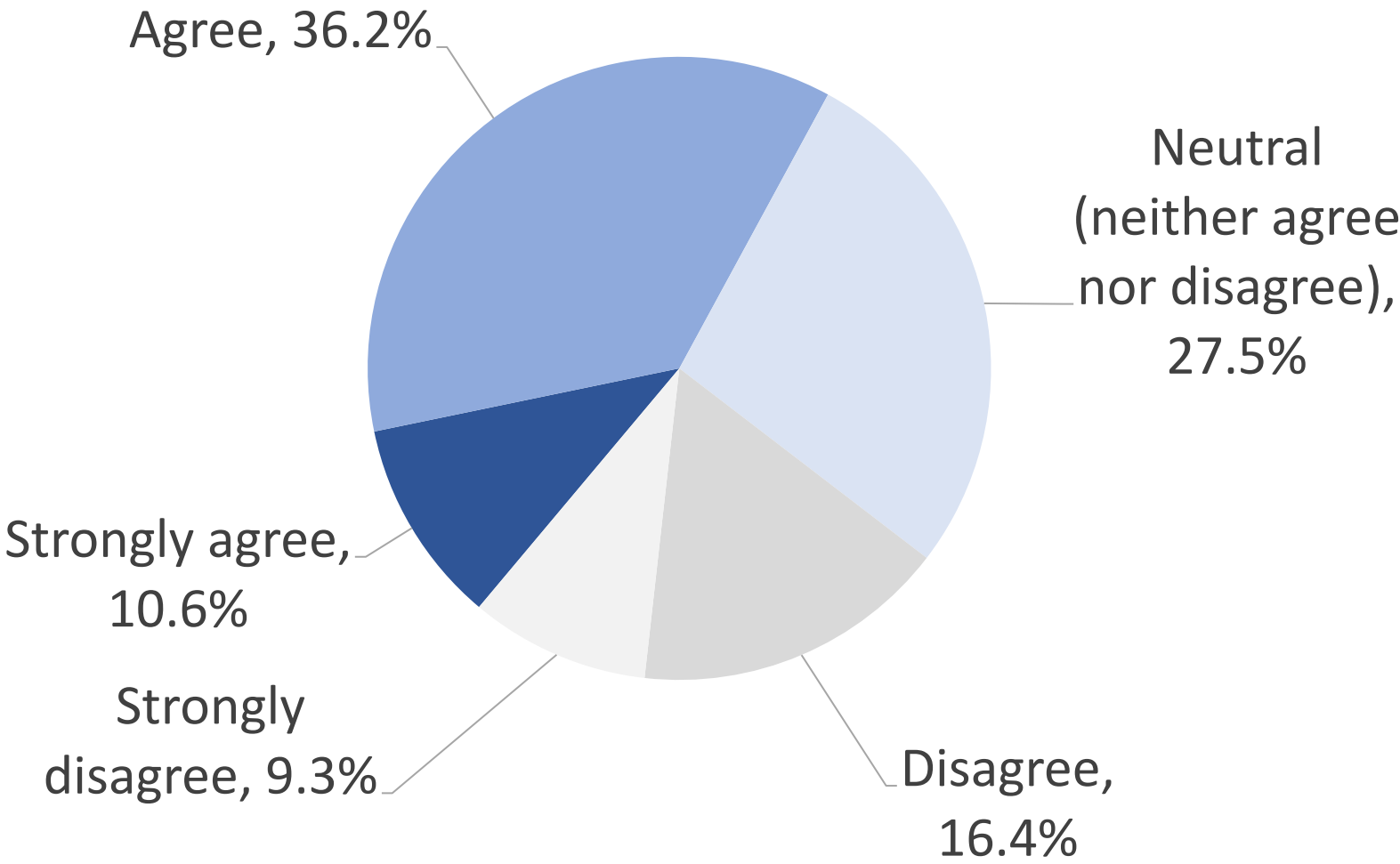


(Base: All respondents, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected, May 22-24, 29-31, June 5-7 and 12-14, 2020)

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.

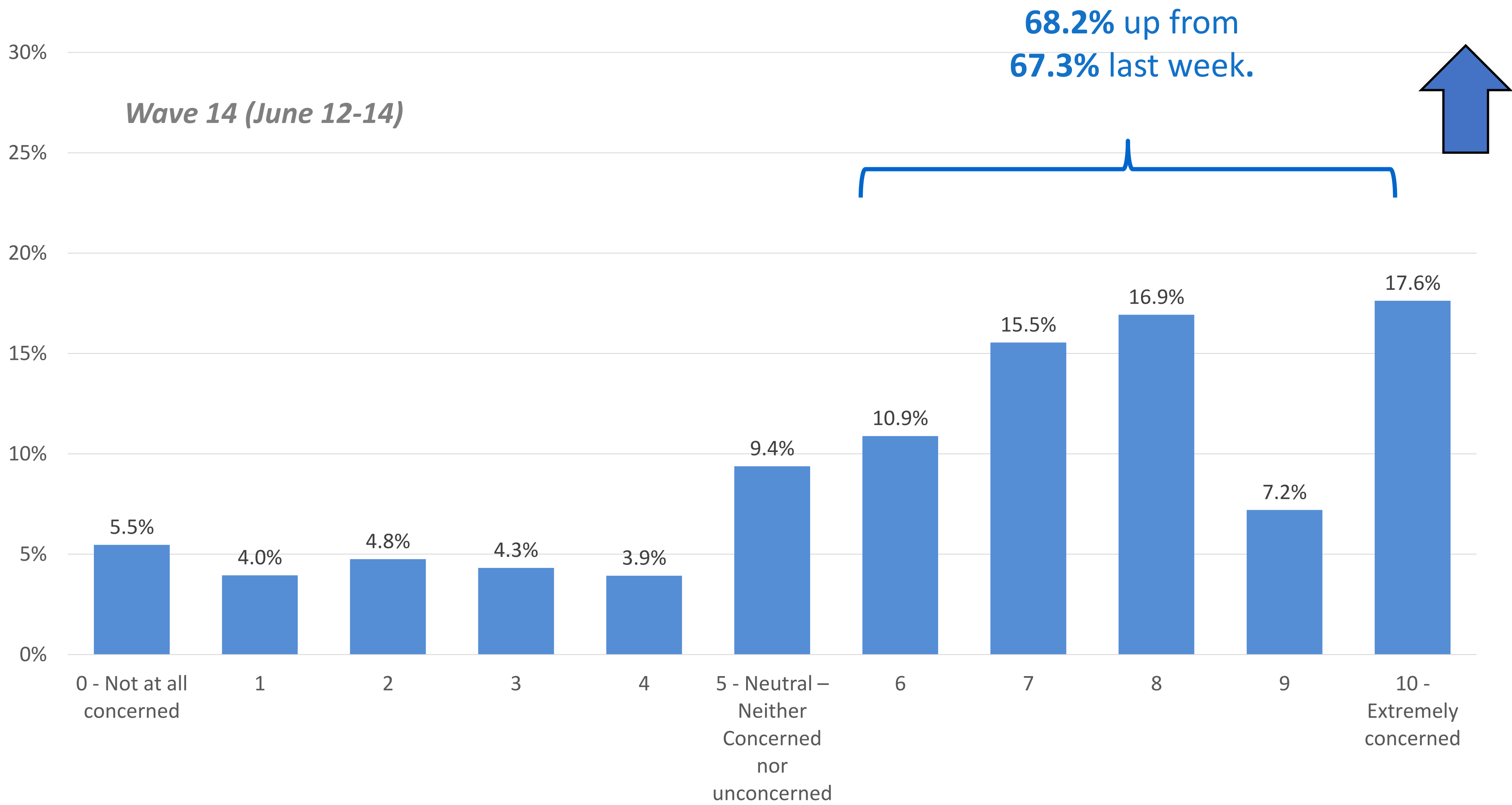


(Base: All respondents, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)

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)

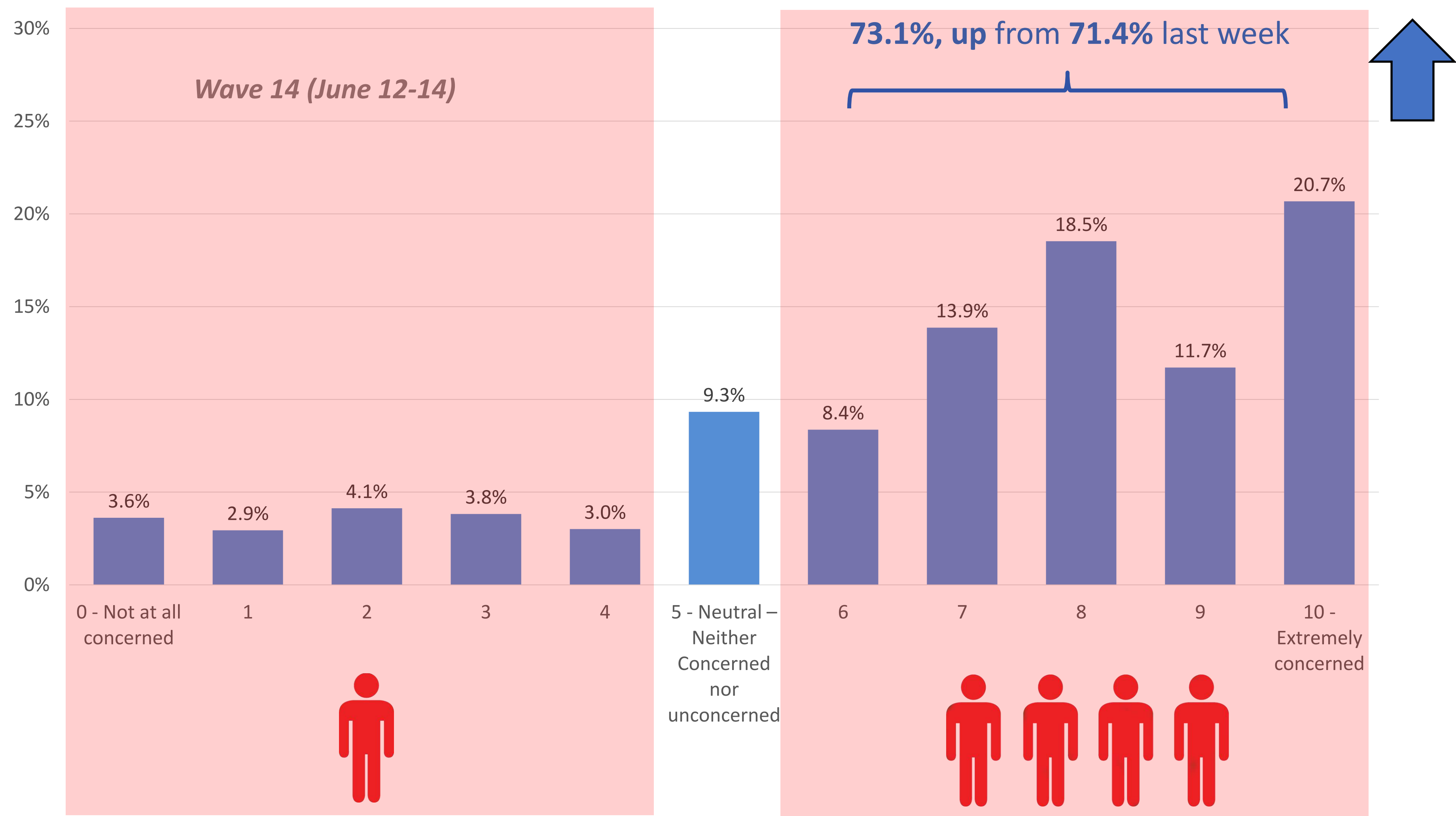
(Base: Wave 14 data. All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



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)

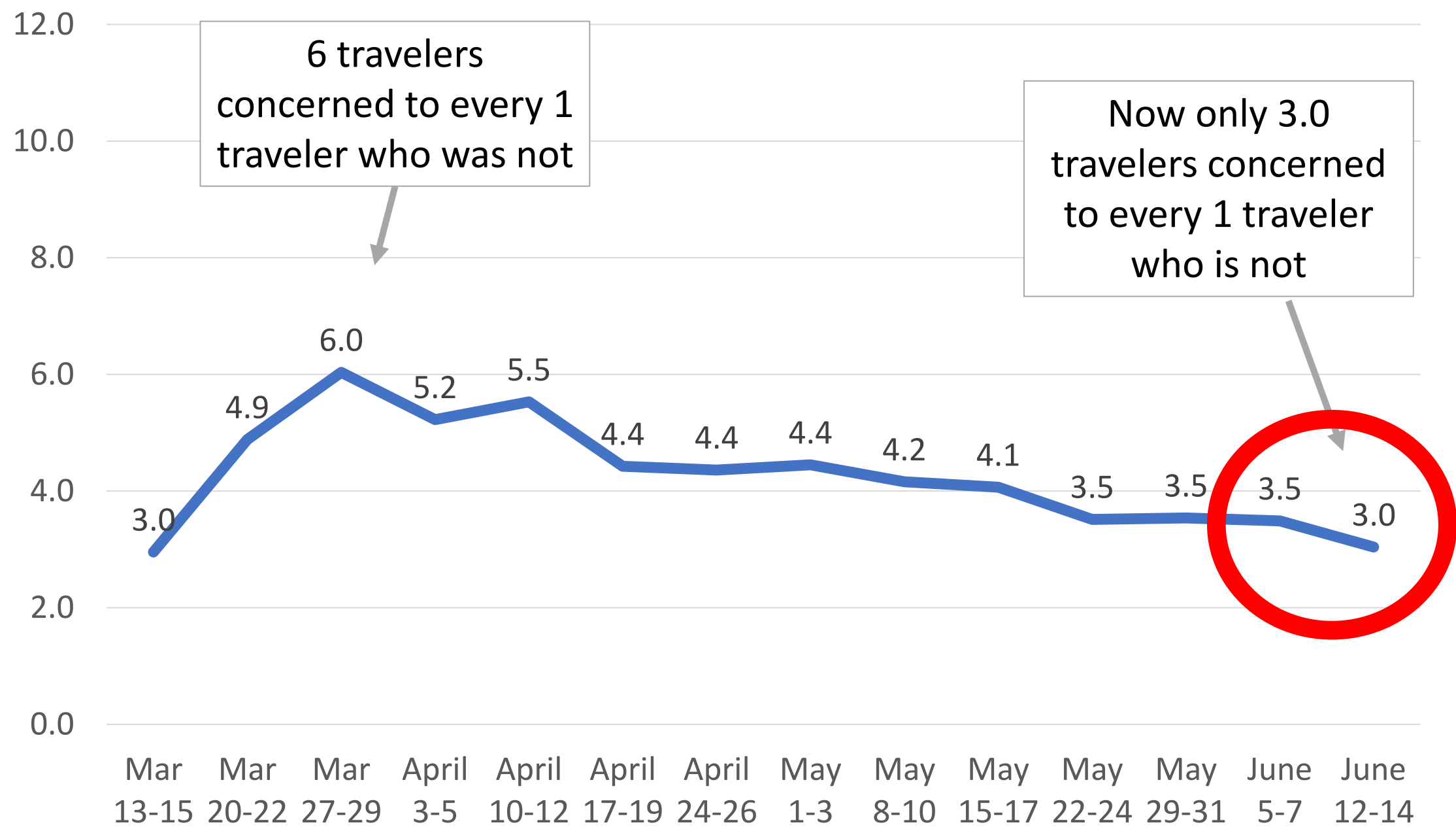
(Base: Wave 14 data. All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



Ratio of Concerned to Unconcerned Travelers: Safety

Personal Safety

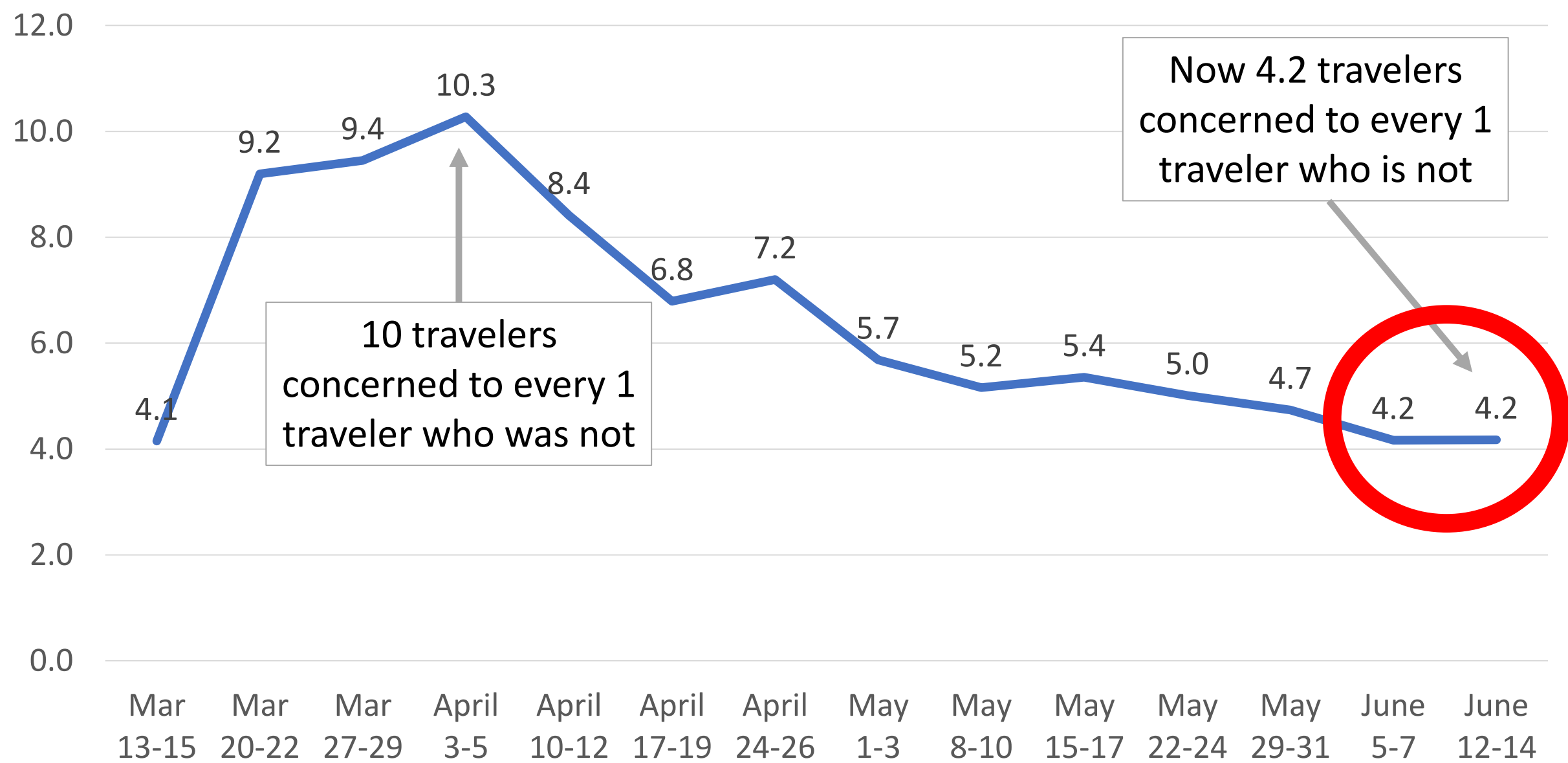
Ratio of concerned (10-6) to unconcerned (0-4) on 11-point scale)



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

Safety of Friends and Relatives

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



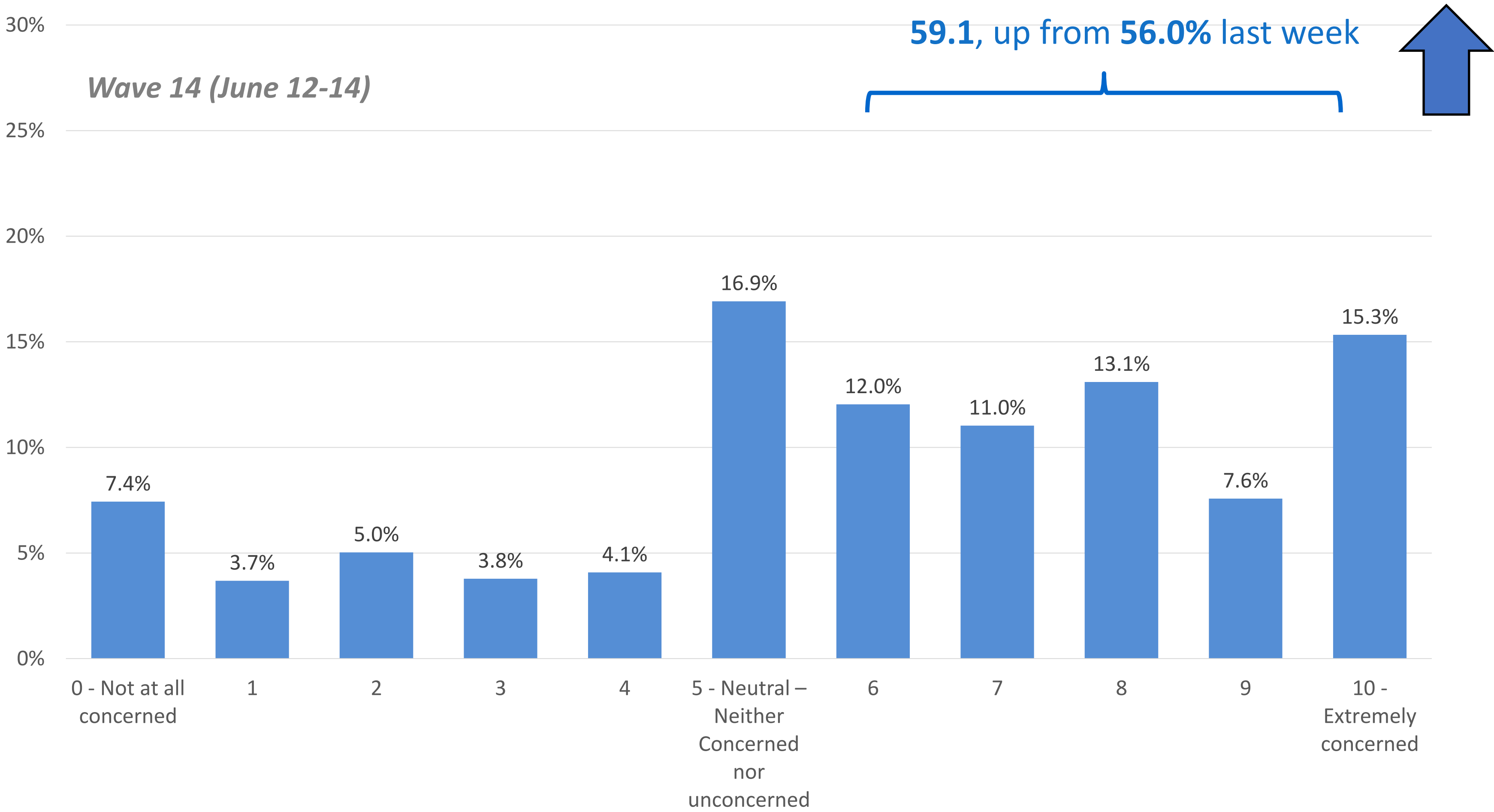
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(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 and 1,214 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 and 12-14 2020)

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)

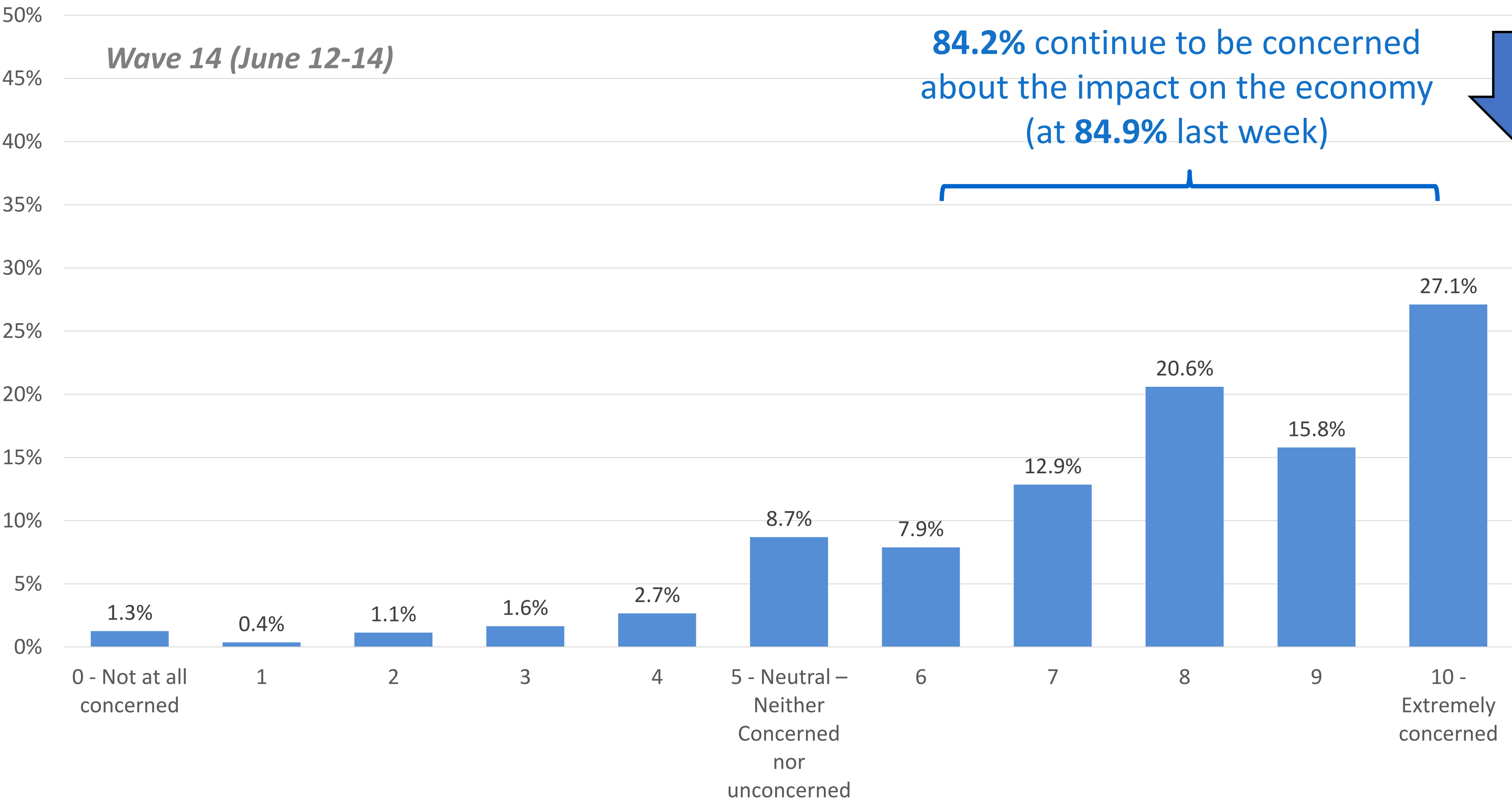
(Base: Wave 14 data. All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



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?

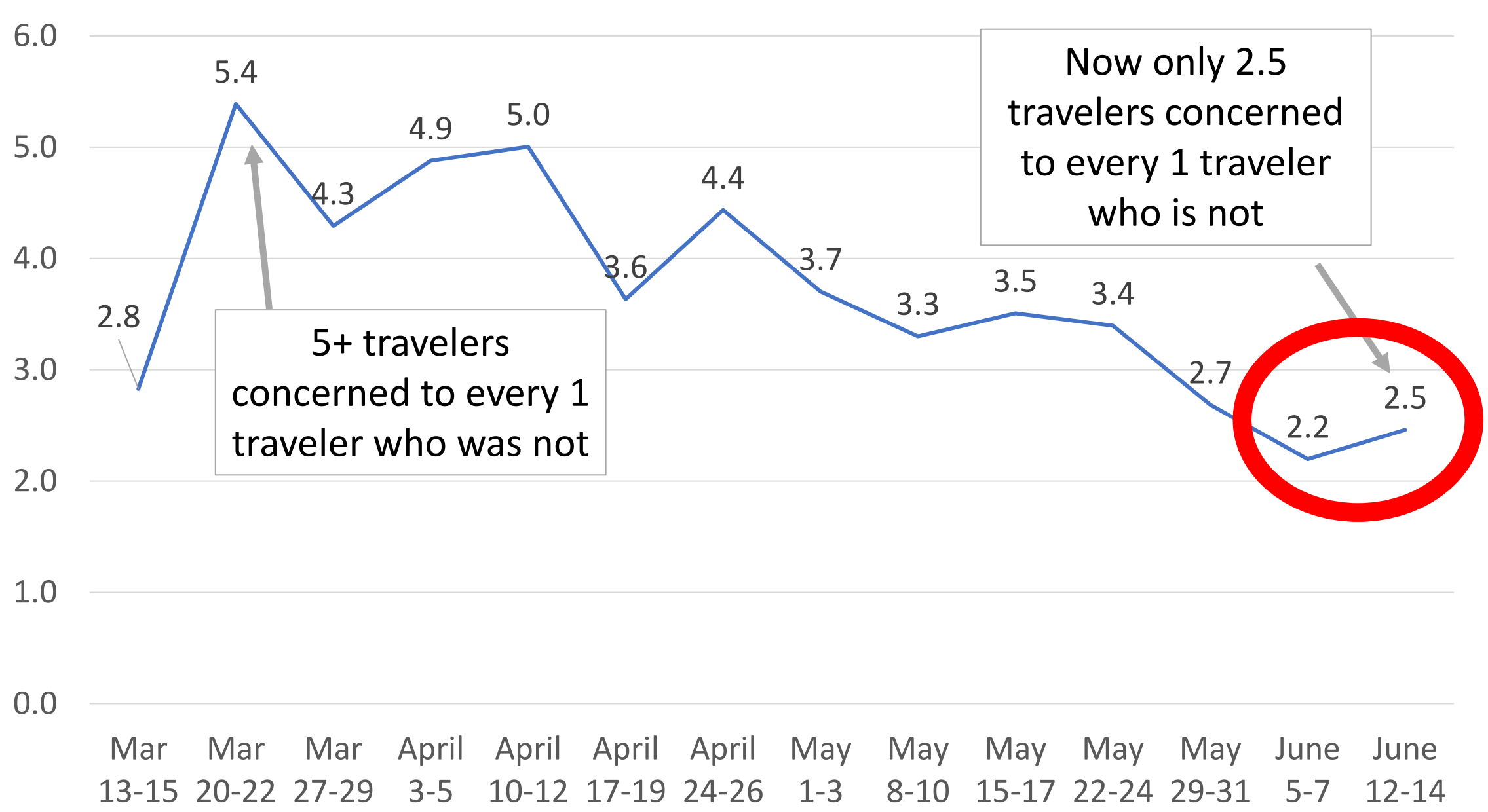
(Base: Wave 14 data. All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Personal Finances

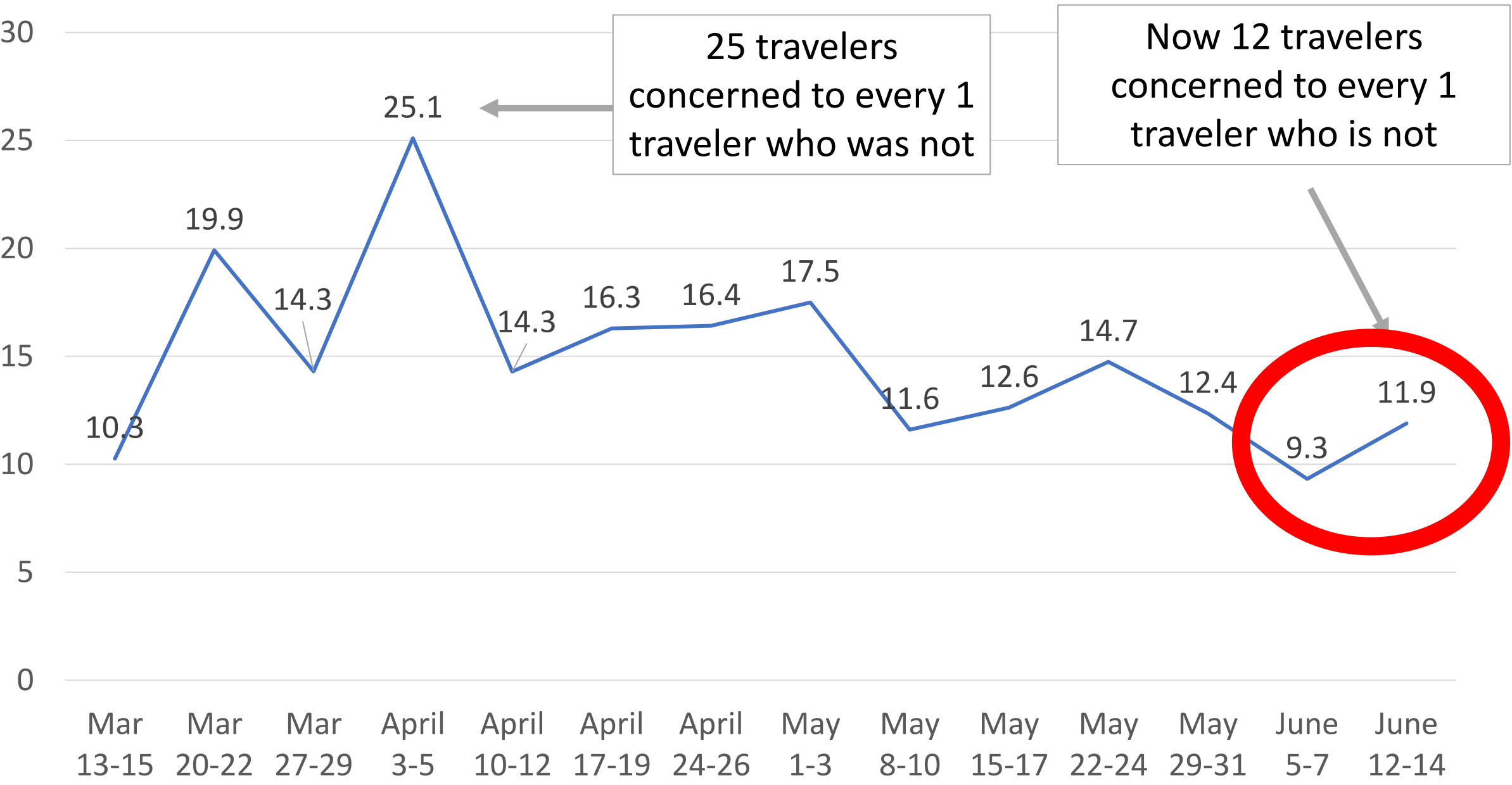
Ratio of concerned (10-6) to unconcerned (0-4) on 11-point scale)



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

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



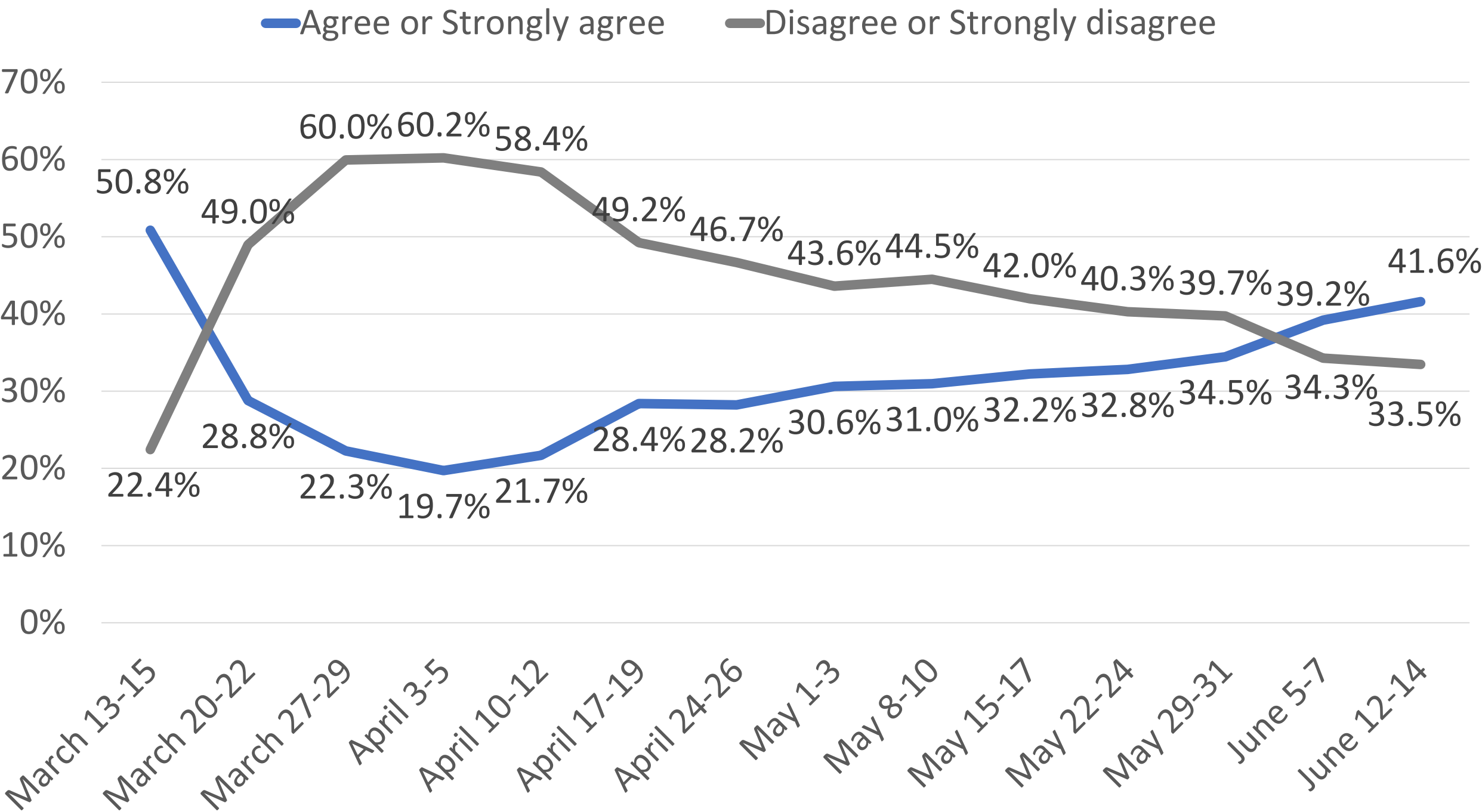
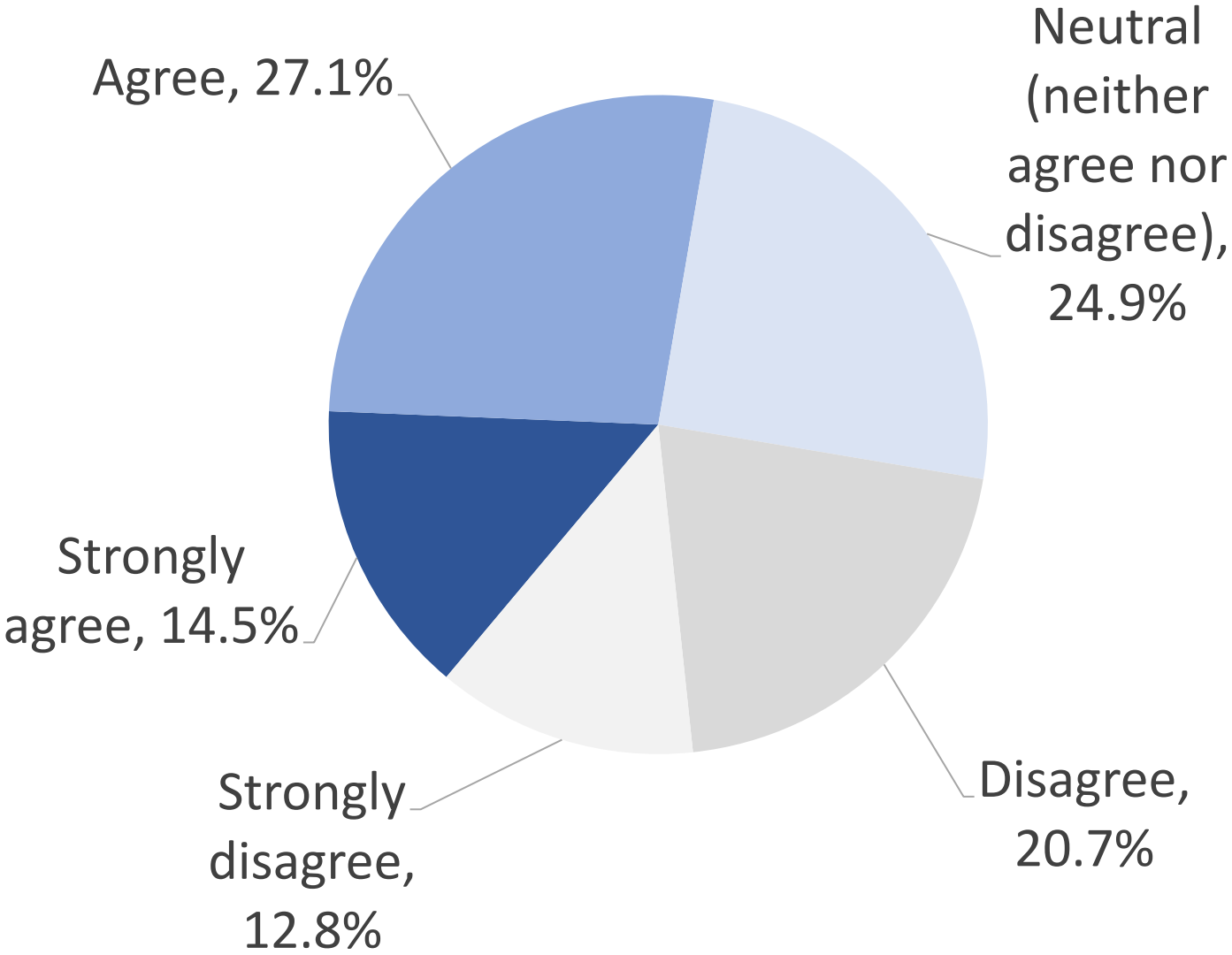
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 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 and 12-14 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.

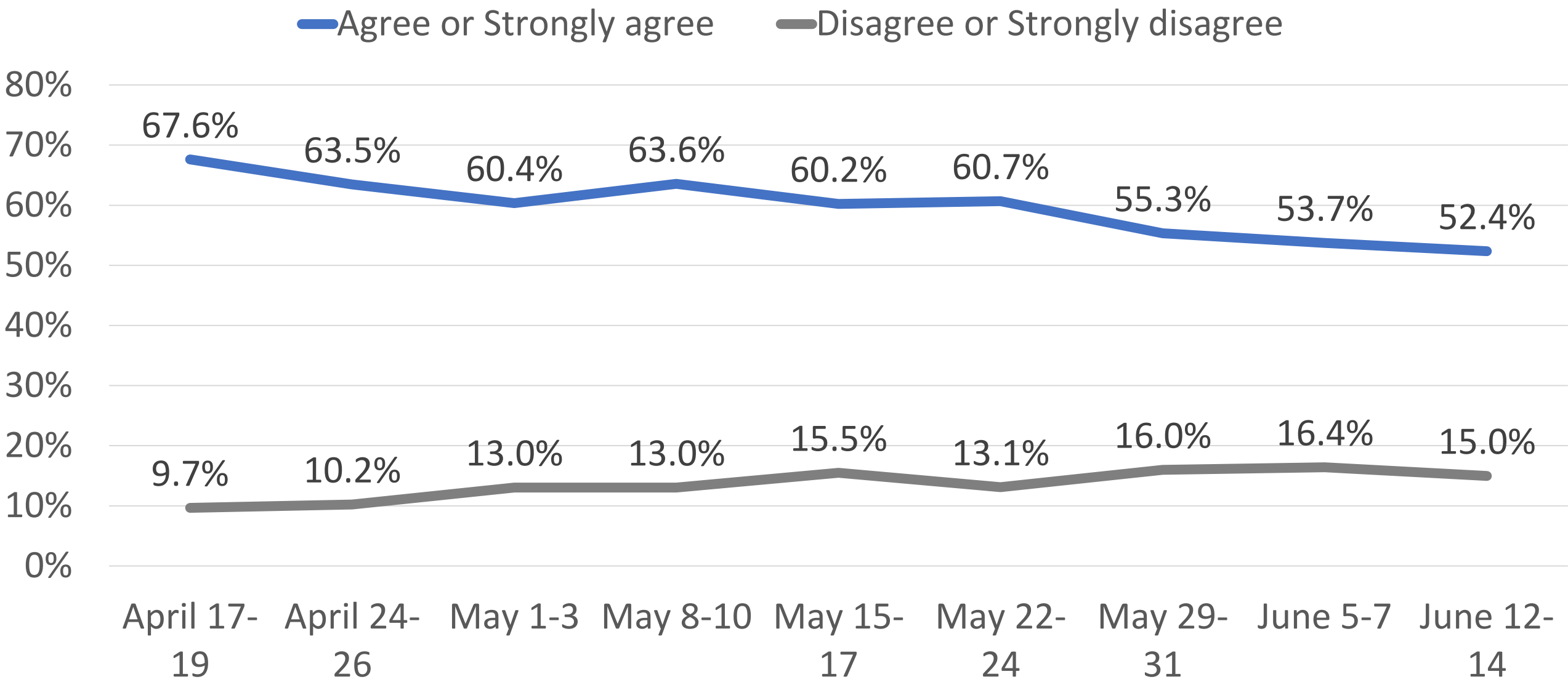
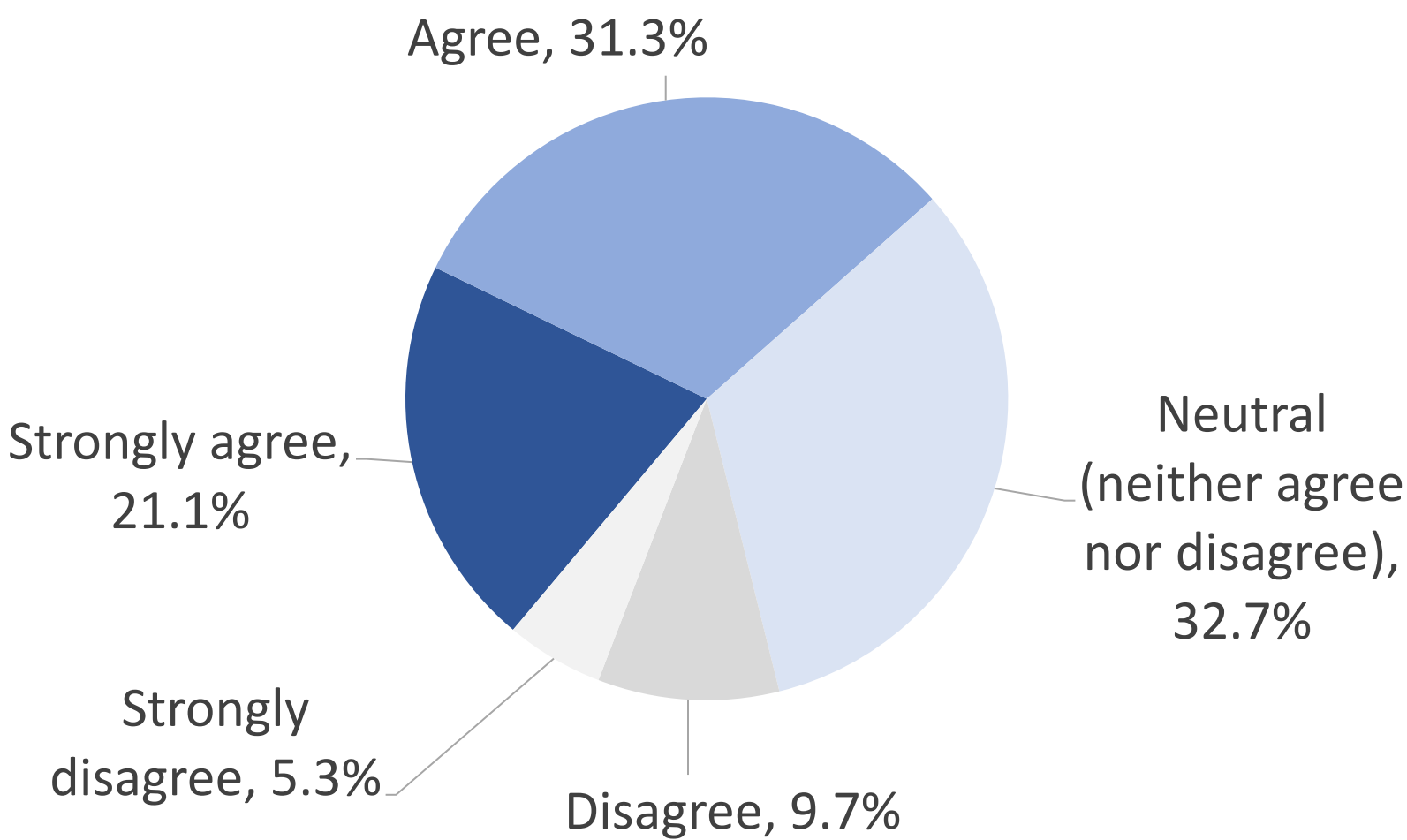


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Travelers in Community are Unwanted

How much do you agree with the following statement?

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

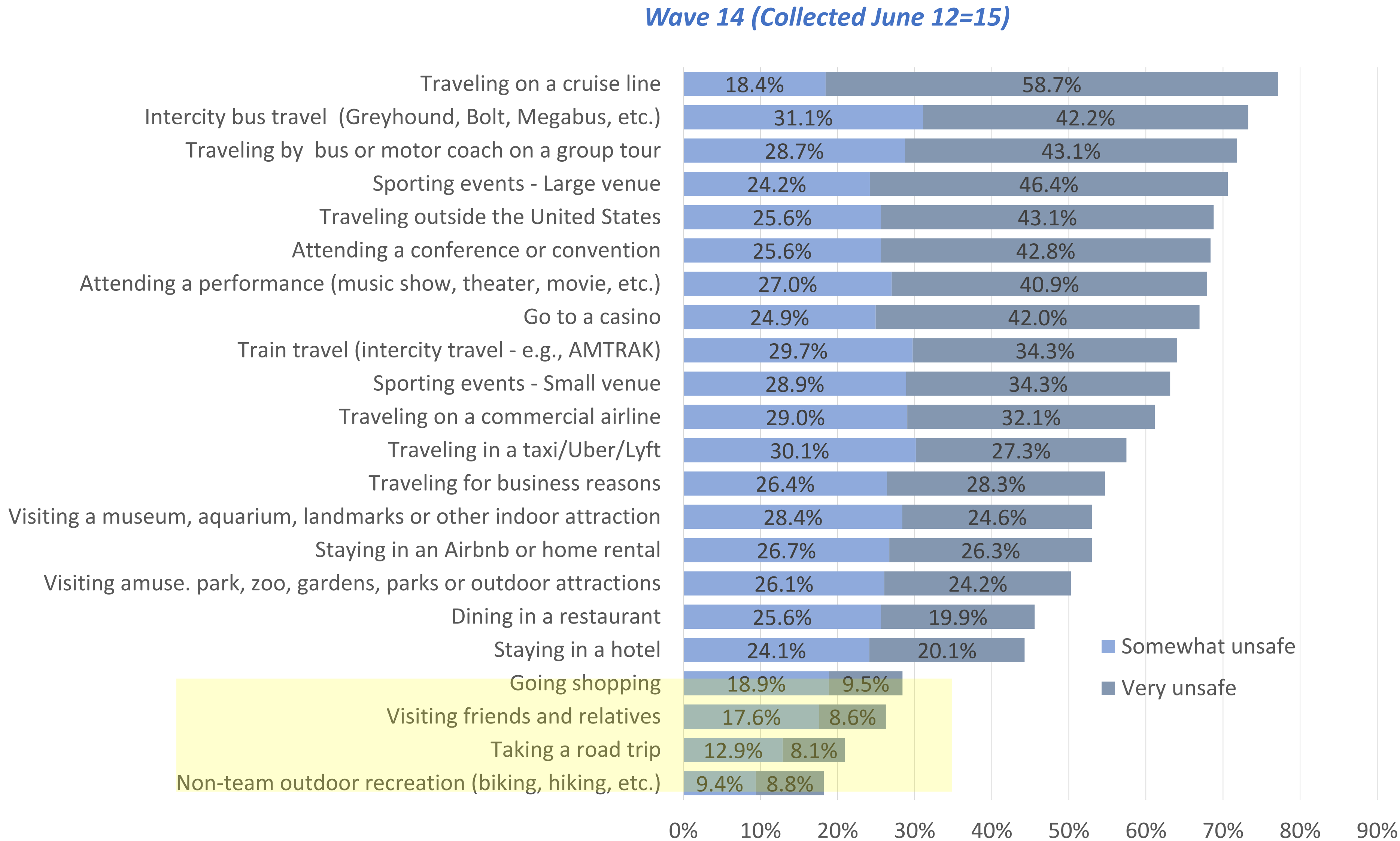


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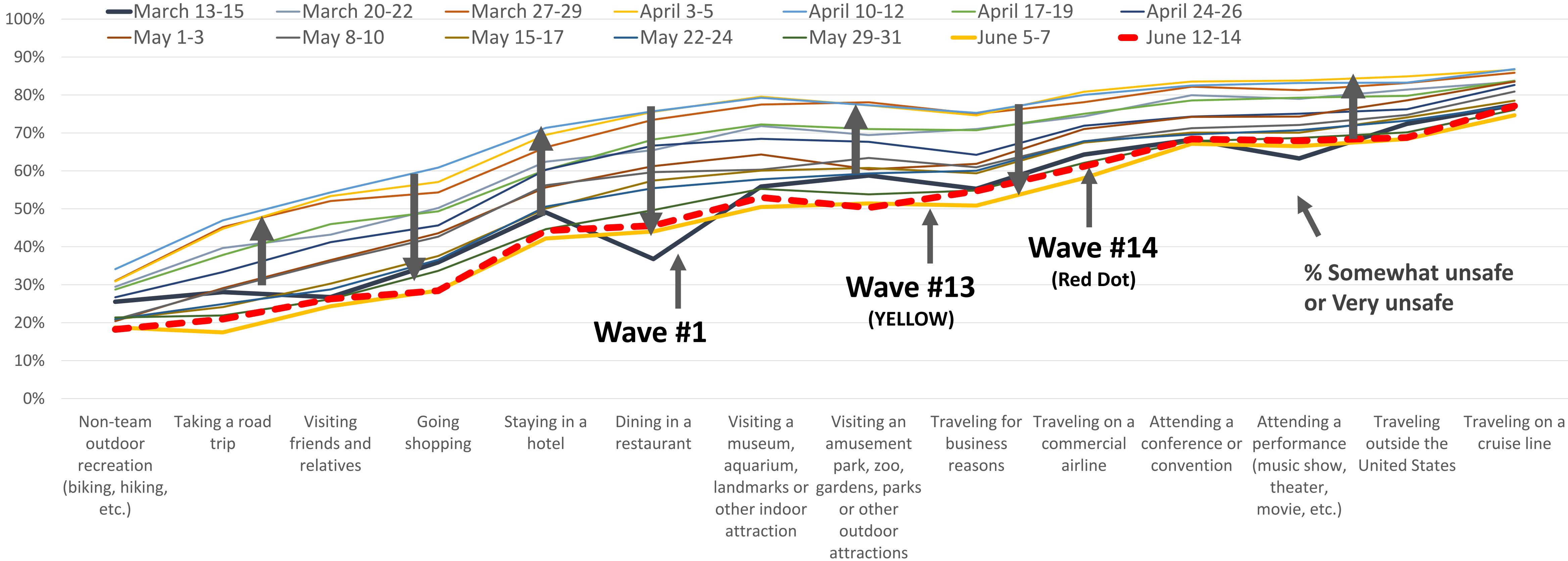
Perceived Safety of Travel Activities (Wave 14)

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

(Base: Wave 14 data. All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

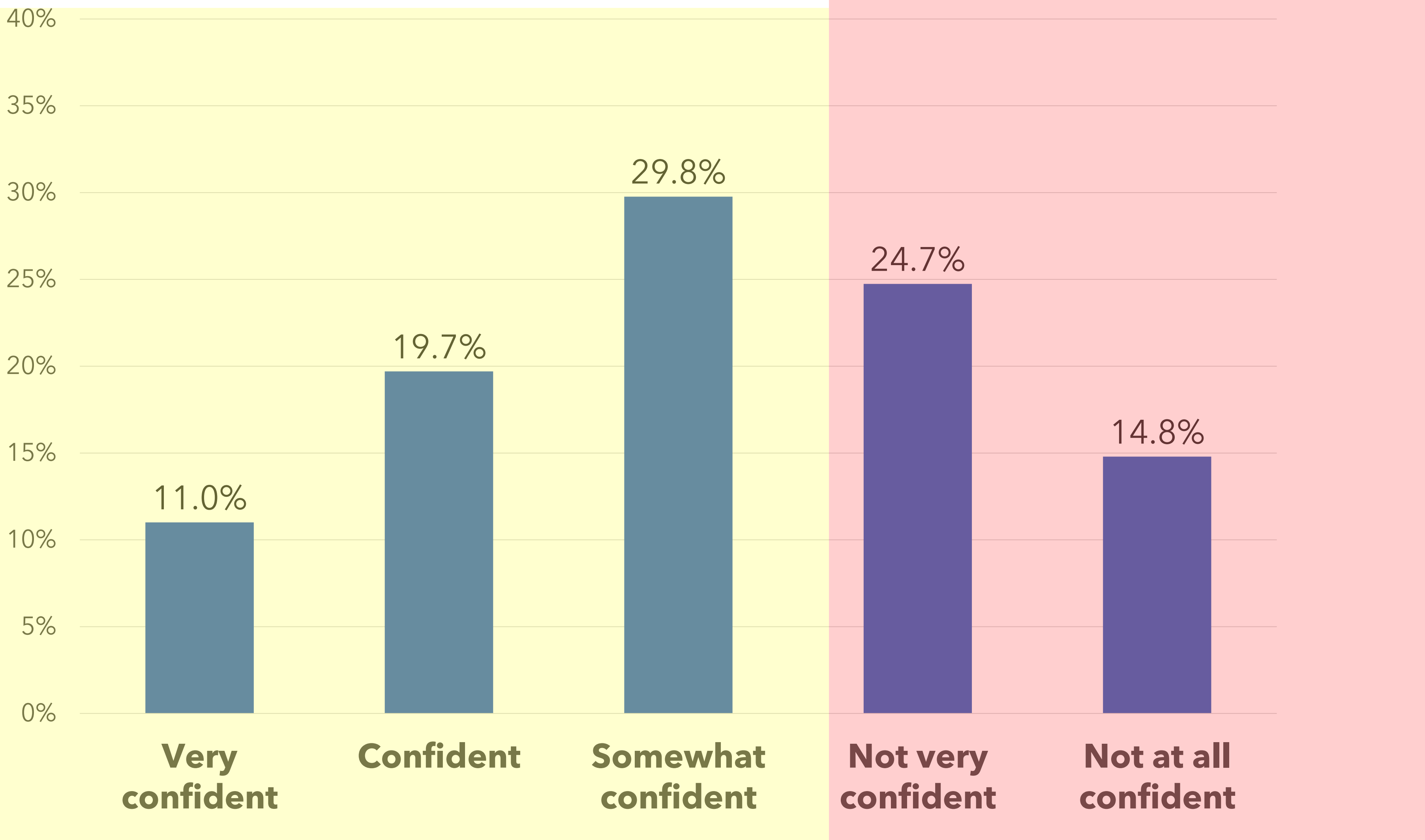


Perceived Safety of Travel Activities (Waves 1-14 Comparison)



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

Confidence in Traveling Safely

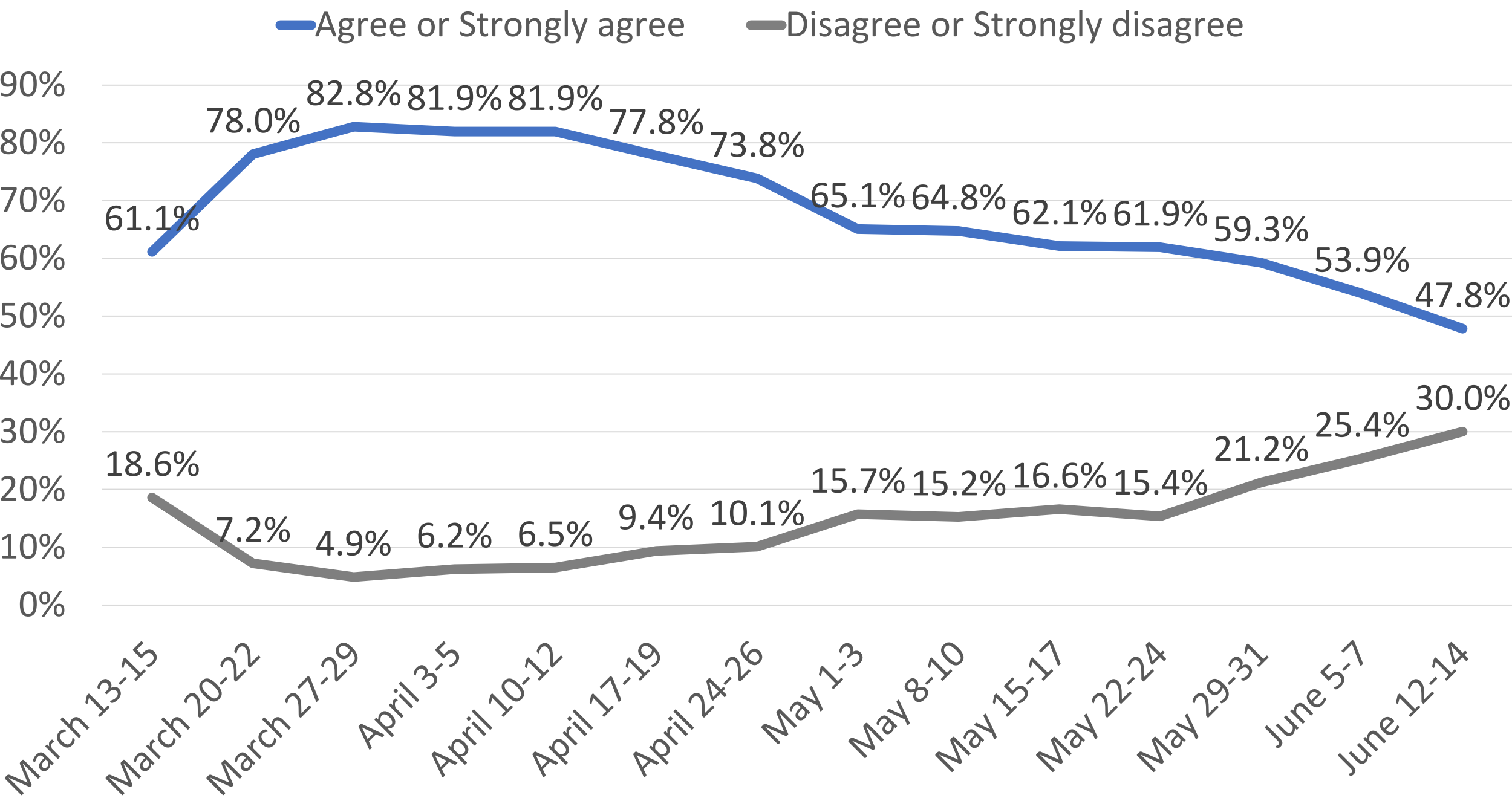
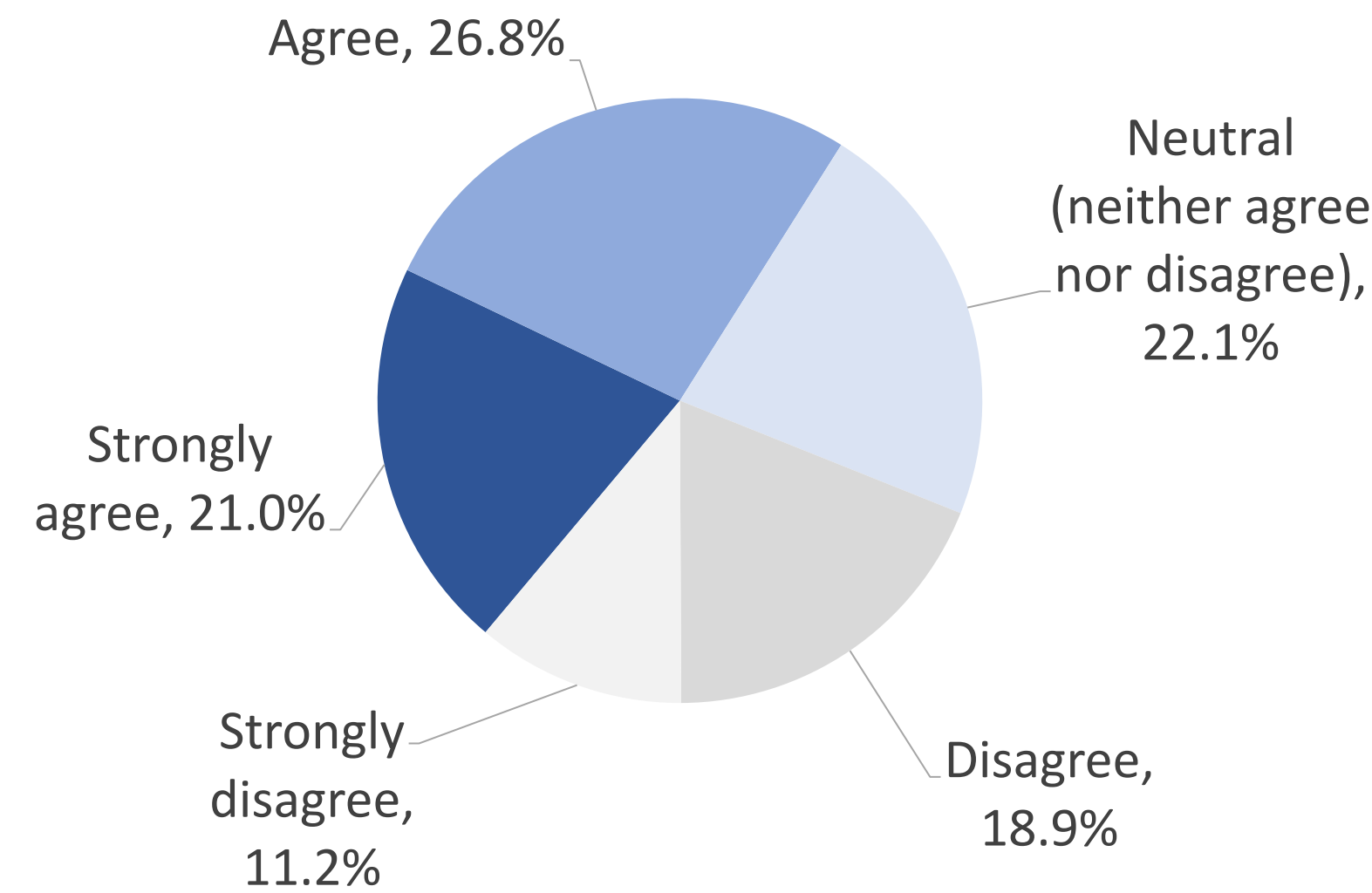


Question: How confident are you that you could travel safely in the current environment? *(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)*

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.

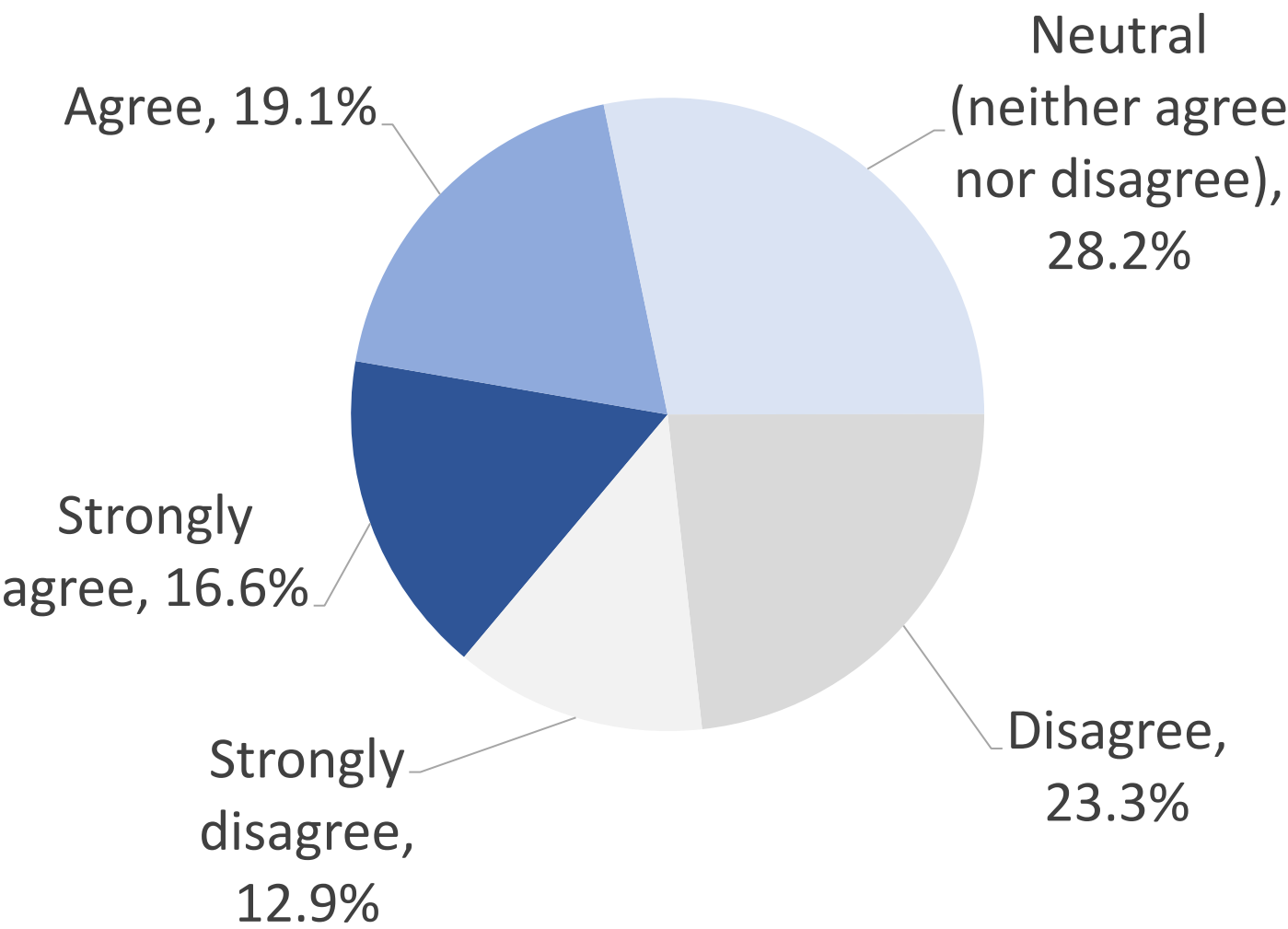


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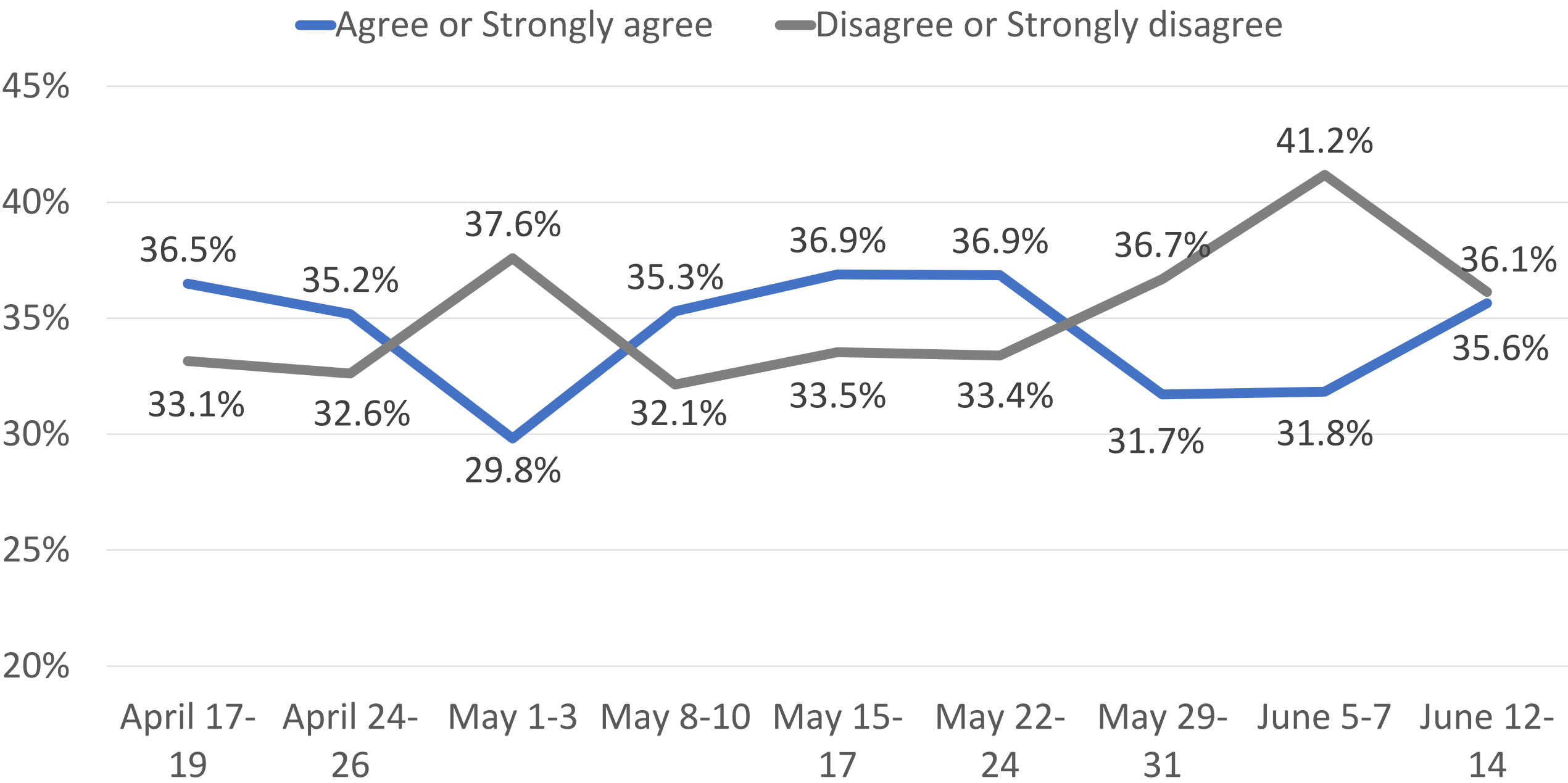
Won't Travel Without Vaccine

How much do you agree with the following statement?

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



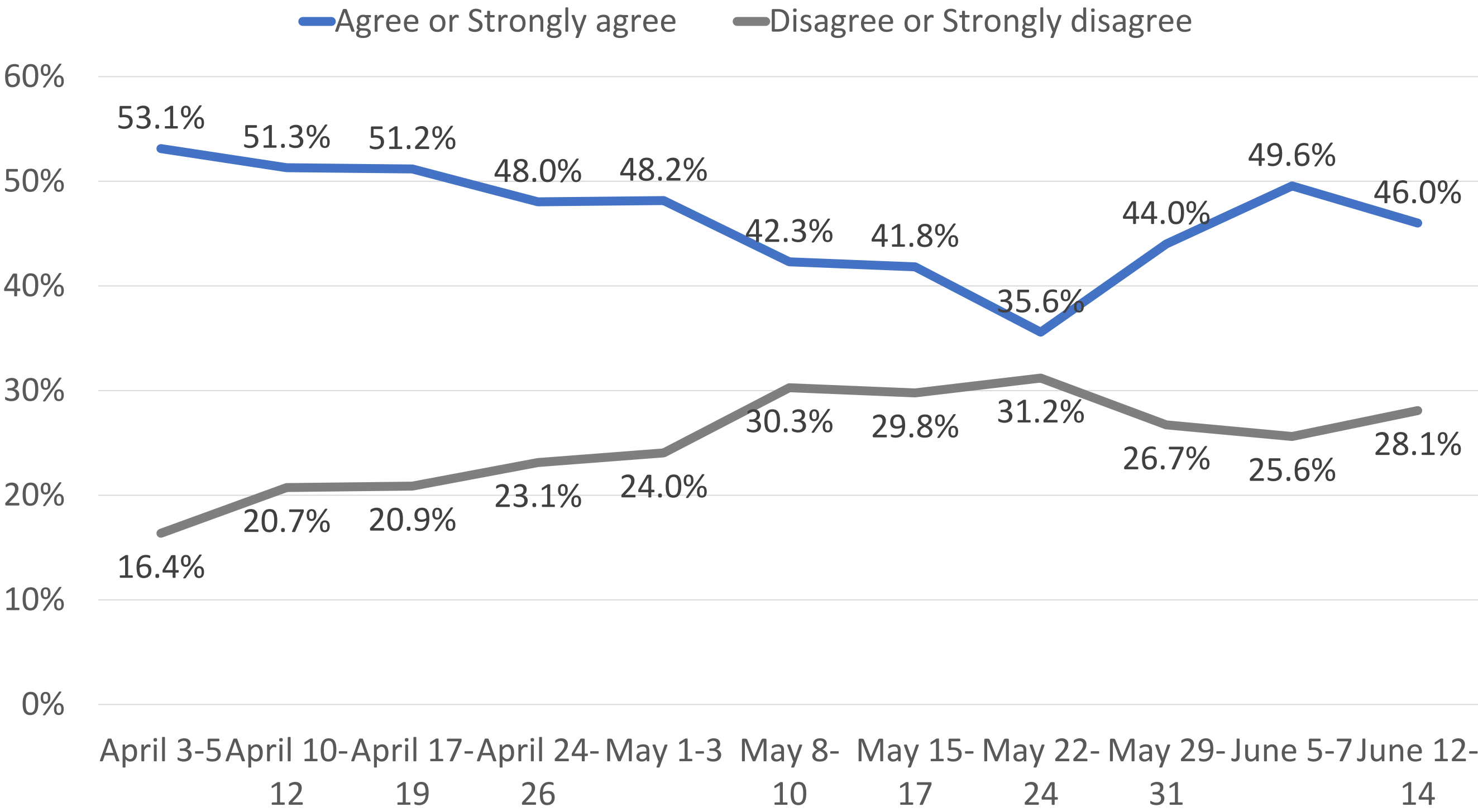
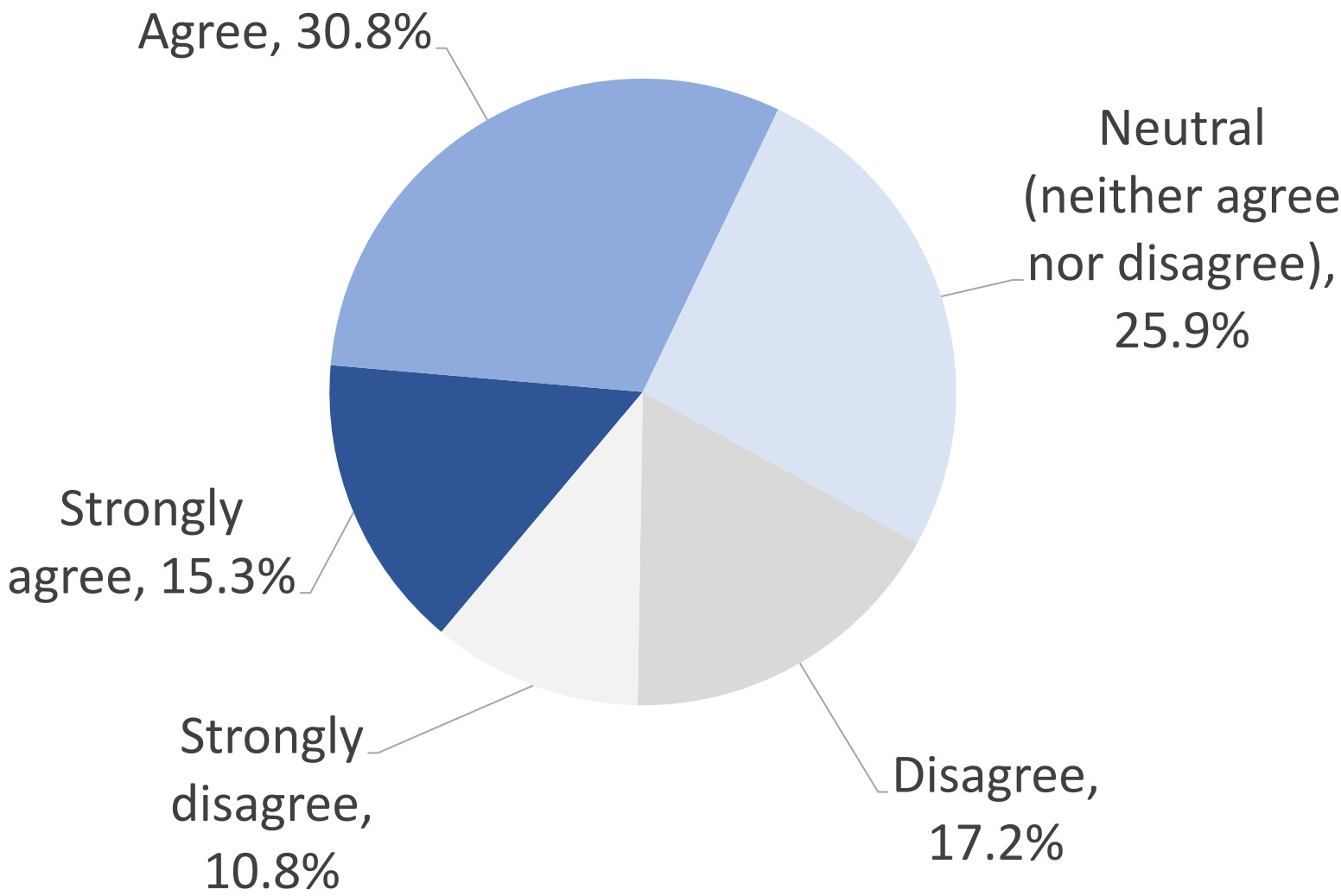
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Expectations for Traveling in the Fall

How much do you agree with the following statement?

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



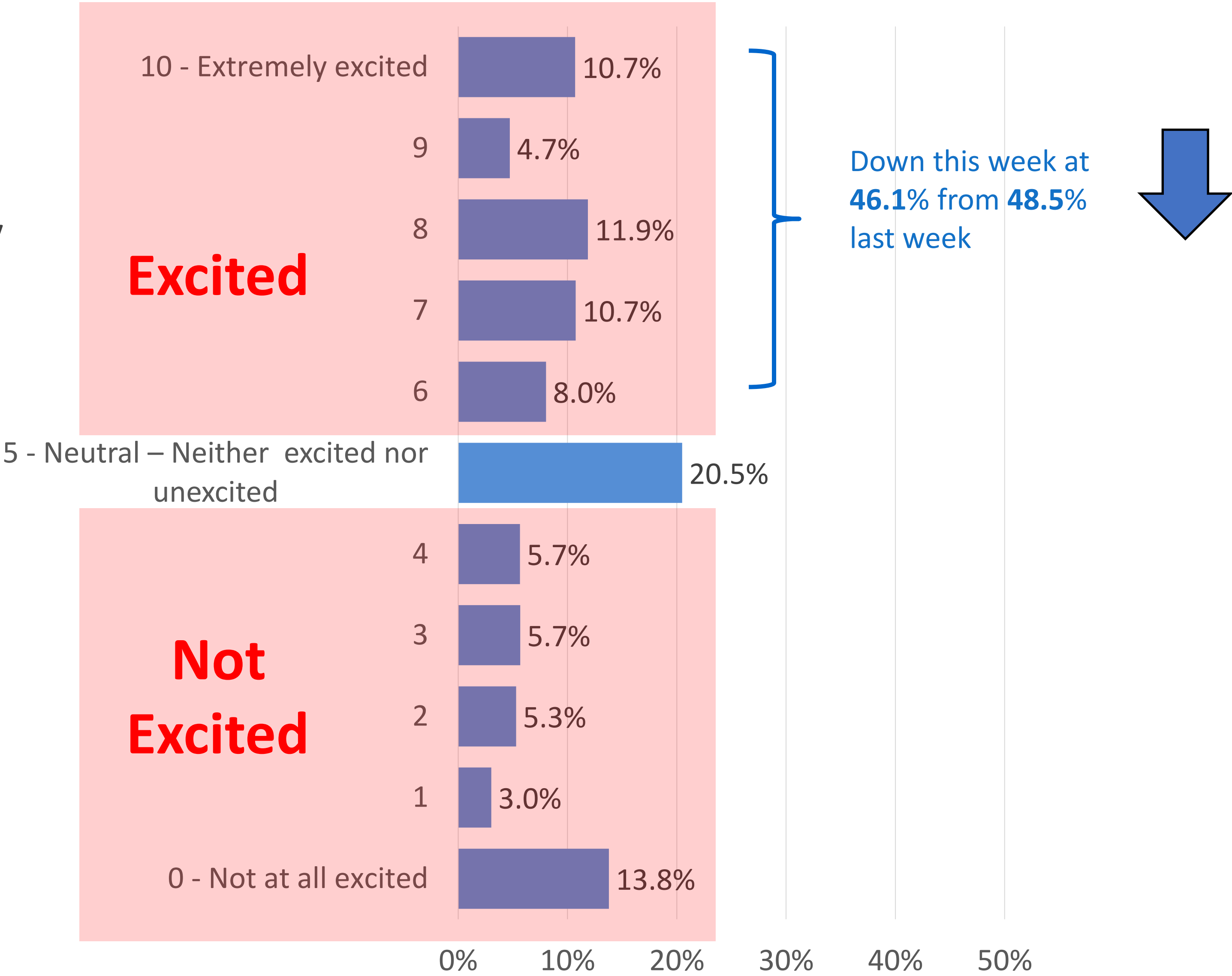
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Excitement to Travel Now

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, 1,214 completed surveys.
Data collected June 12-14, 2020)*

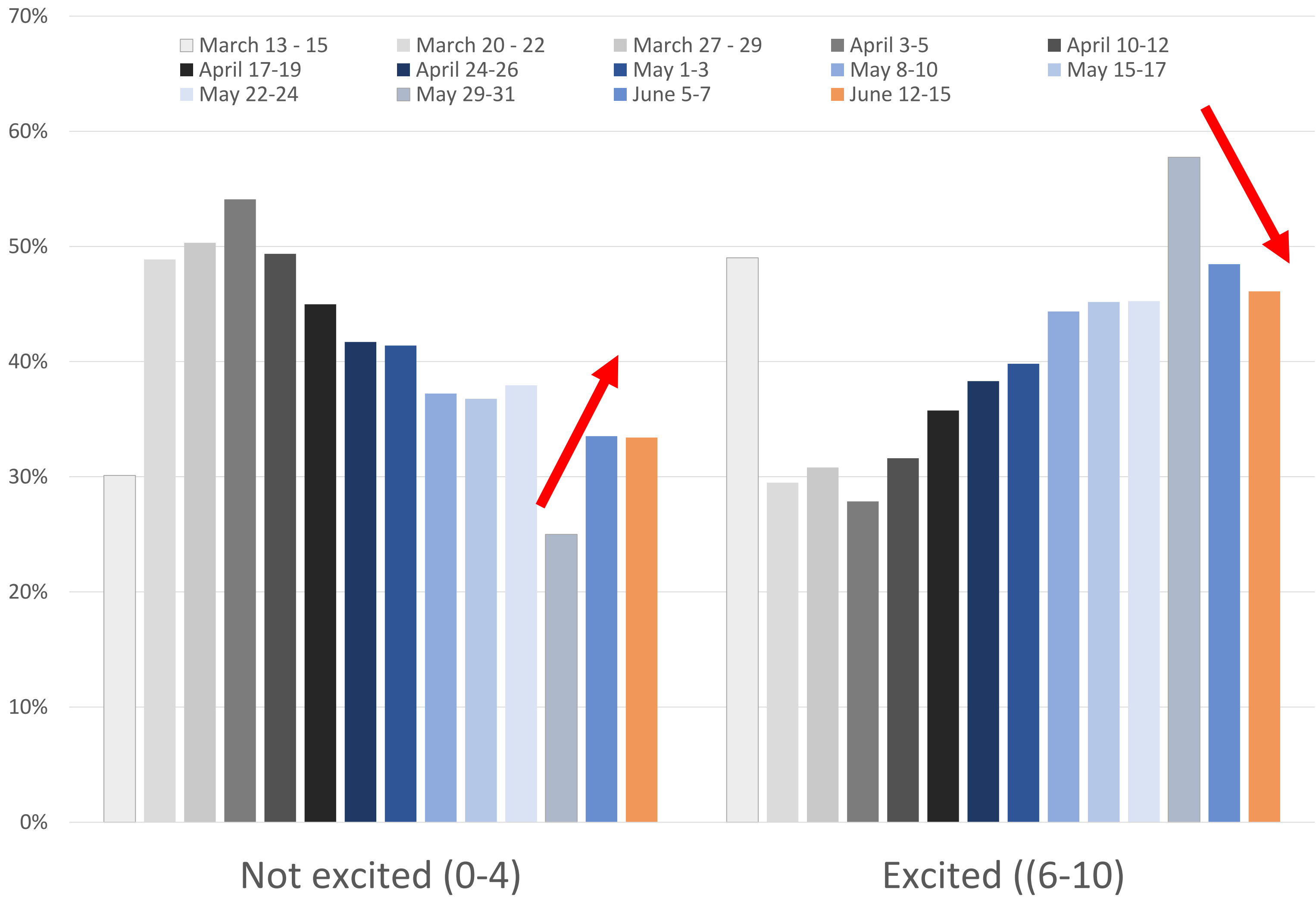


Excitement to Travel Now (Excited vs. Not Excited)

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)

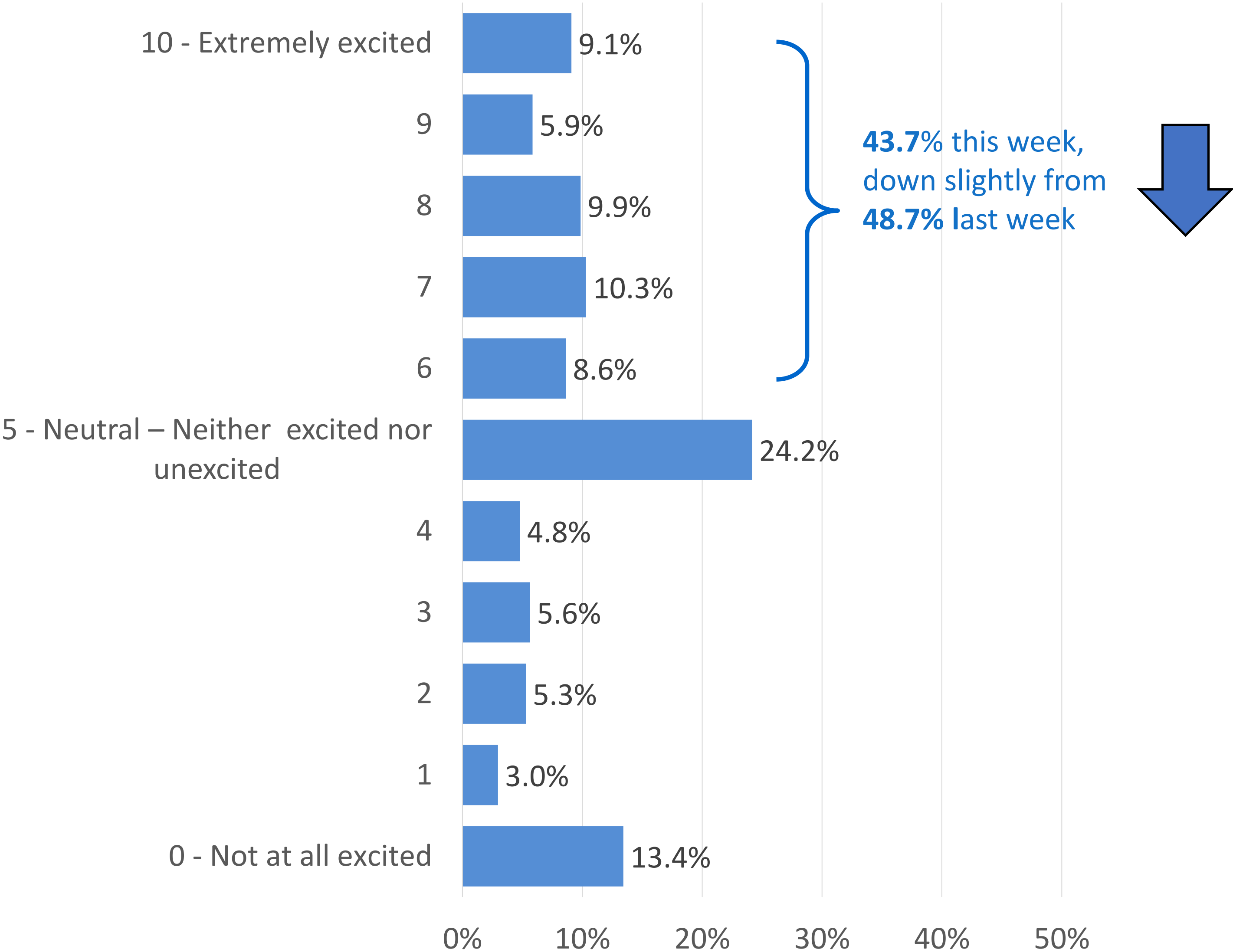
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Openness to Travel Information

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

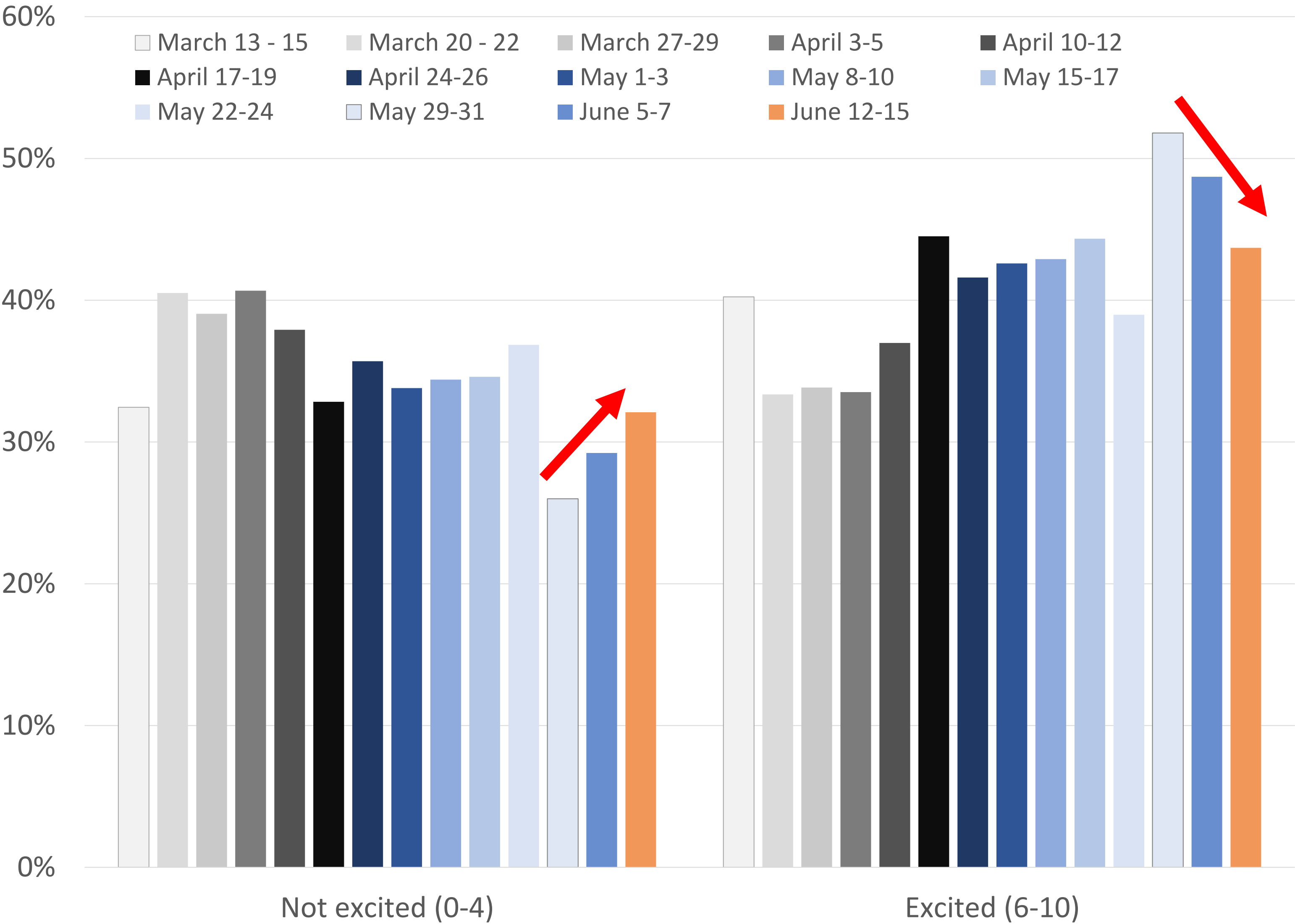
*(Base: All respondents, 1,214 completed surveys.
Data collected June 12-14, 2020)*



Openness to Travel Information (Excited vs. Not Excited)

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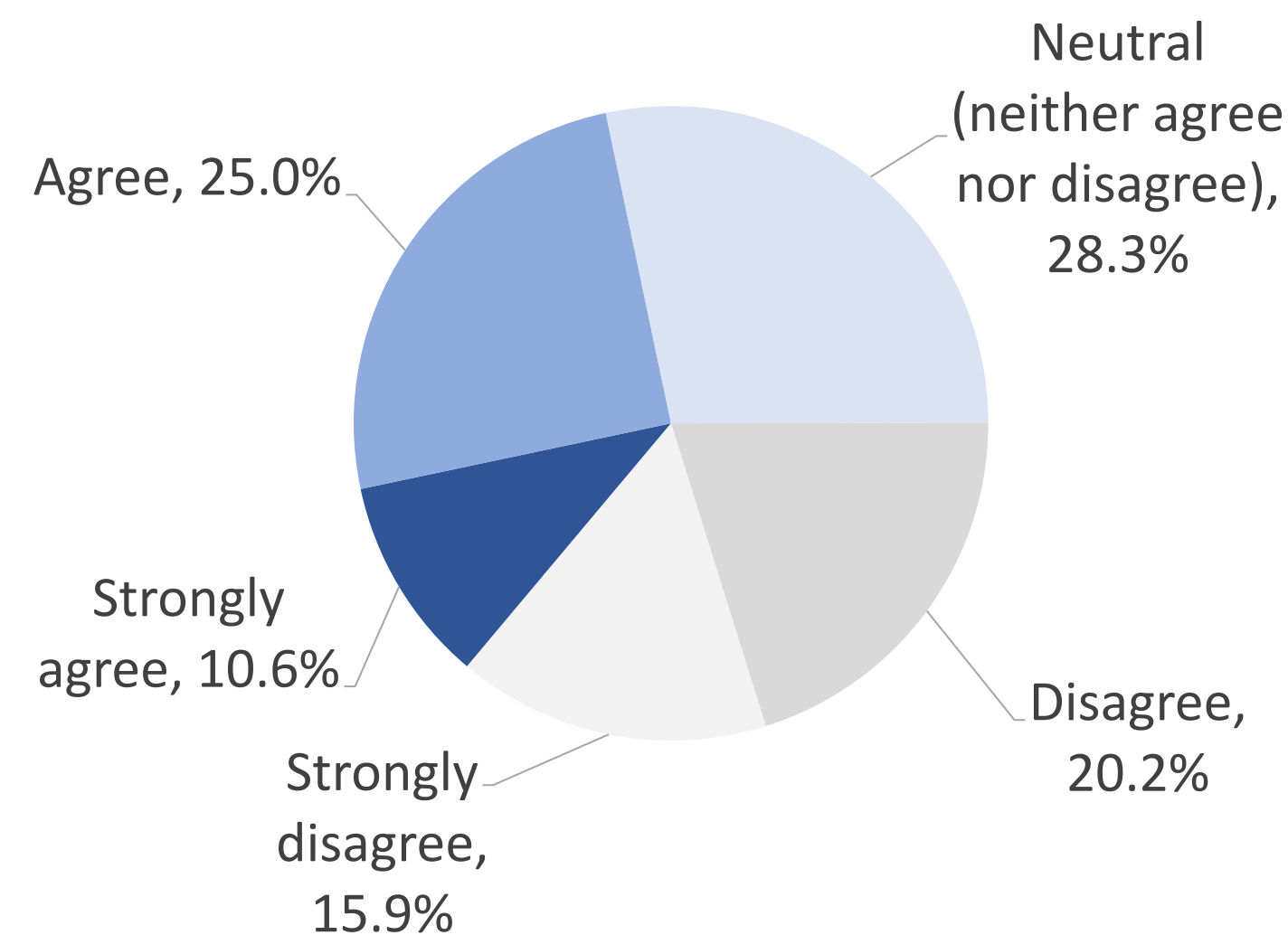
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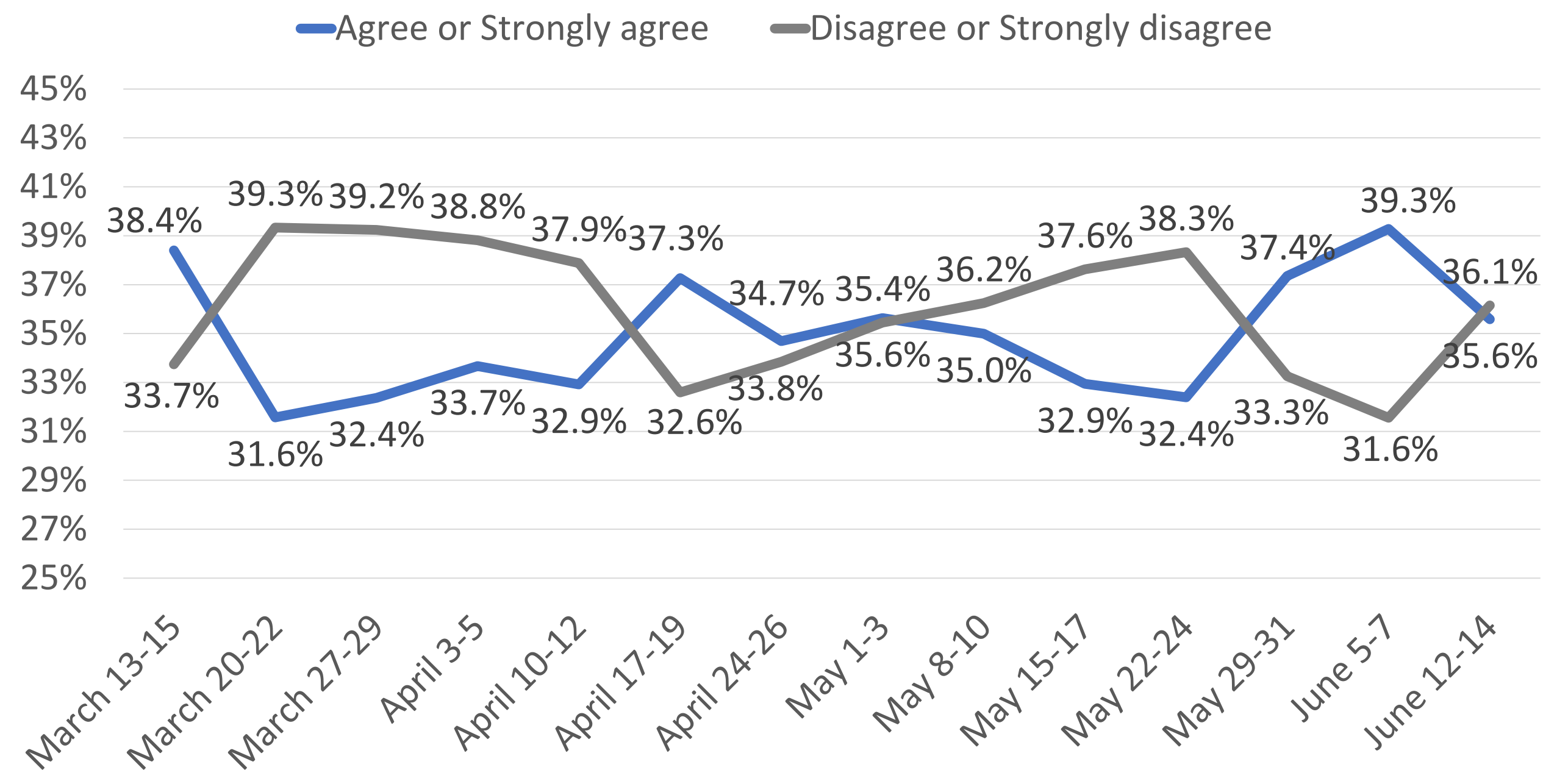
Discounts and Price Cuts

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, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 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 and 12-14, 2020)





KEY TAKEAWAYS

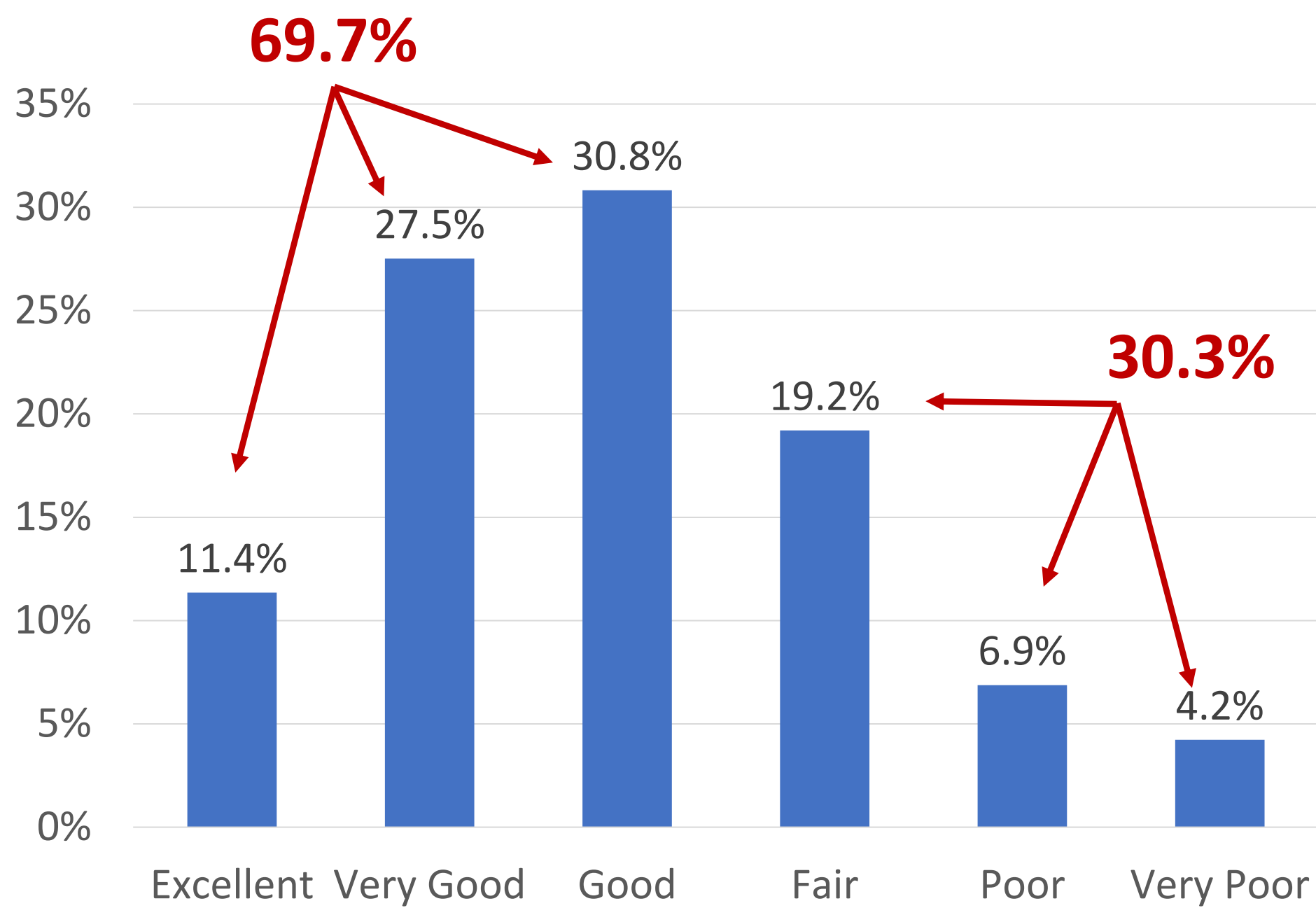
- **Expectations that the Coronavirus situation will worsen in the US over the next month increased dramatically this week**
- **More Americans reported concerns about finances, the economy and contracting the virus**
- **The consistent improvements we had seen in safety concerns for individual travel activities stopped this week**
- **4 in 10 American travelers remain lacking in confidence that they can travel safely in the current environment**
- **Enthusiasm for near-term travel, destination inspiration waned, and discounts loss some ability to motivate travel**

Performance in Pandemic-Related Management & Communication



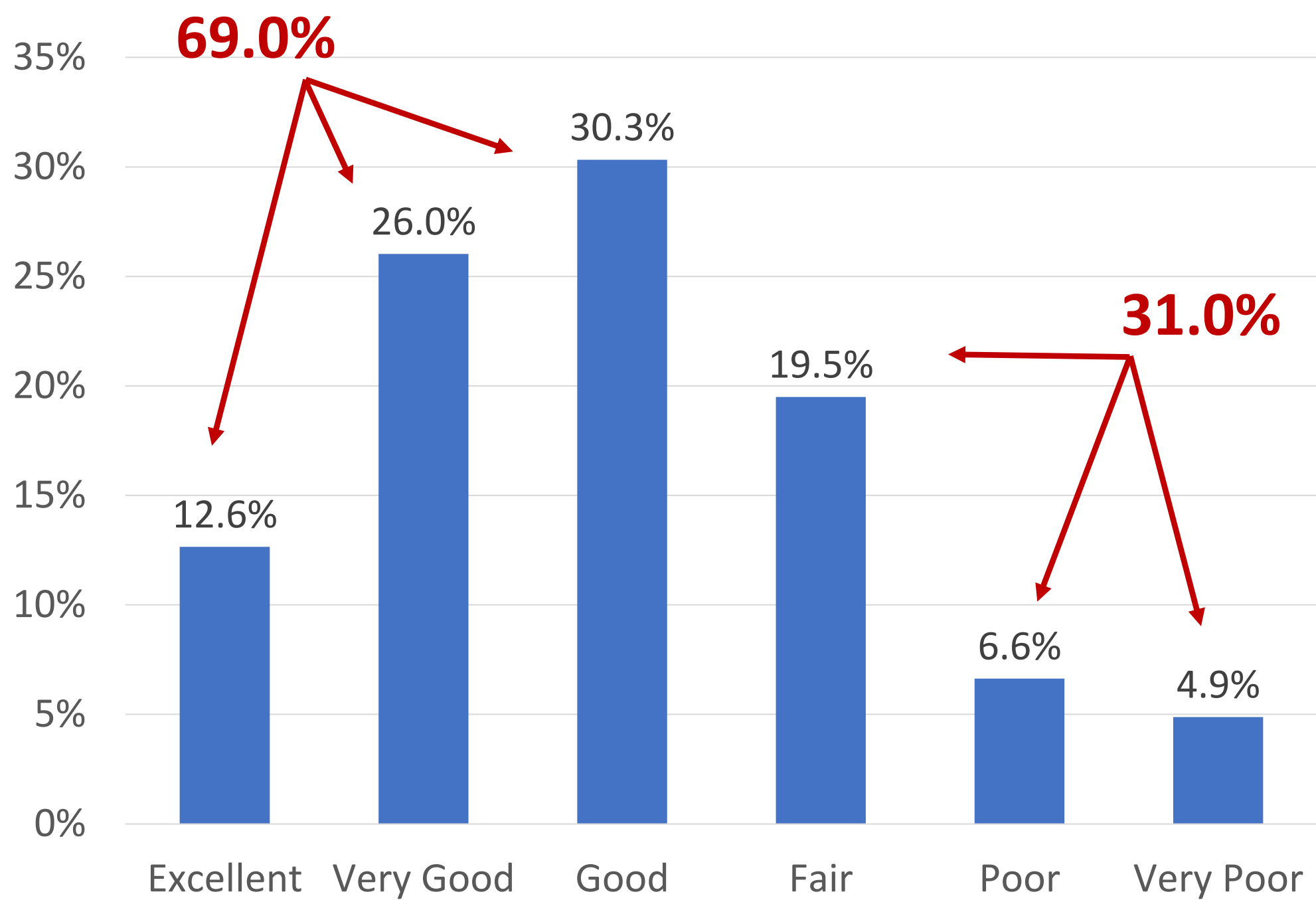
Performance of Local Officials

Managing Government Response to Pandemic



Question: Please rate the overall performance of your local or city officials in managing government efforts to deal with the Coronavirus pandemic.

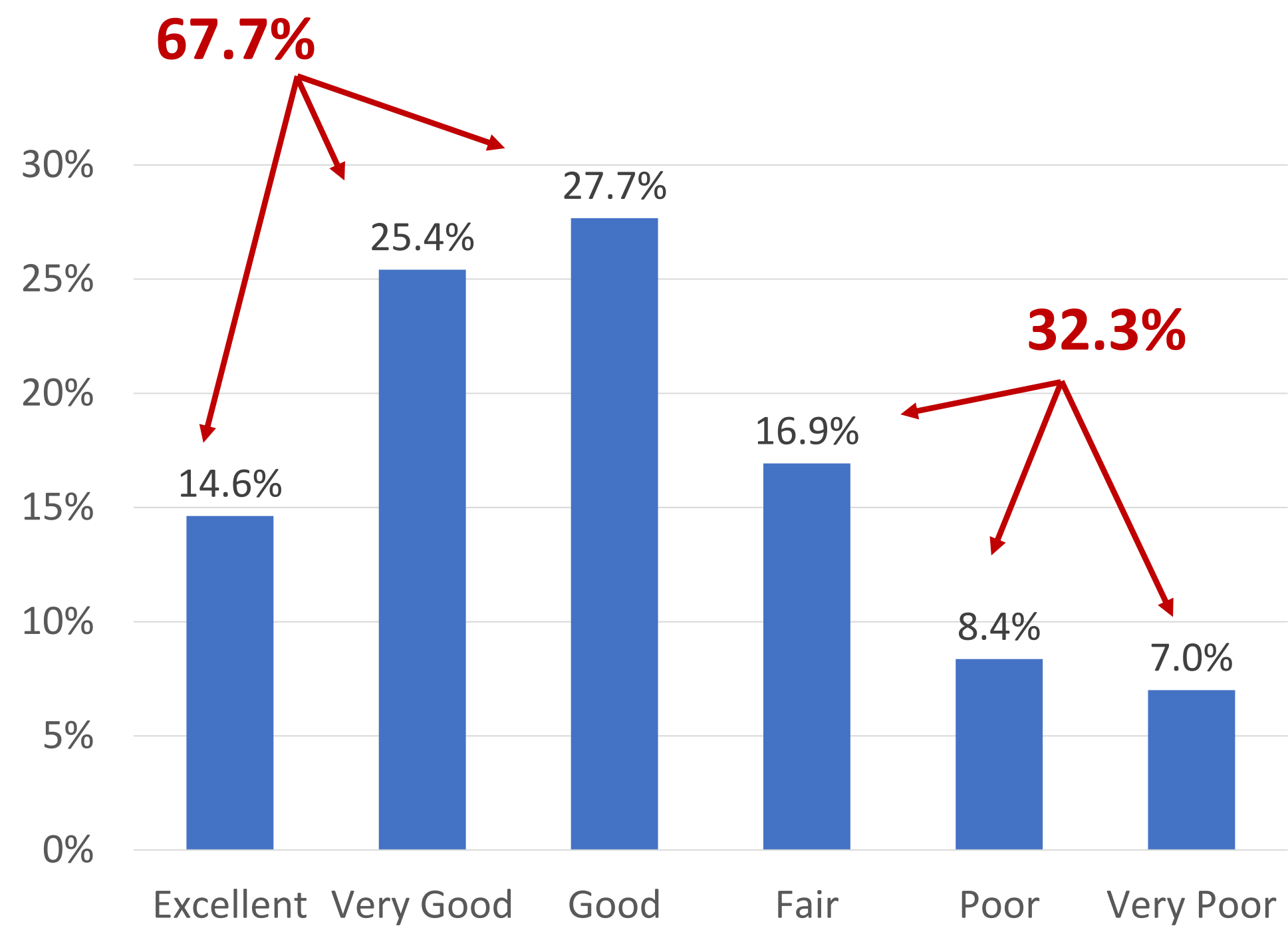
Communicating with the Public



Question: Please rate the overall performance of your local or city officials in communicating with the public during the Coronavirus pandemic.

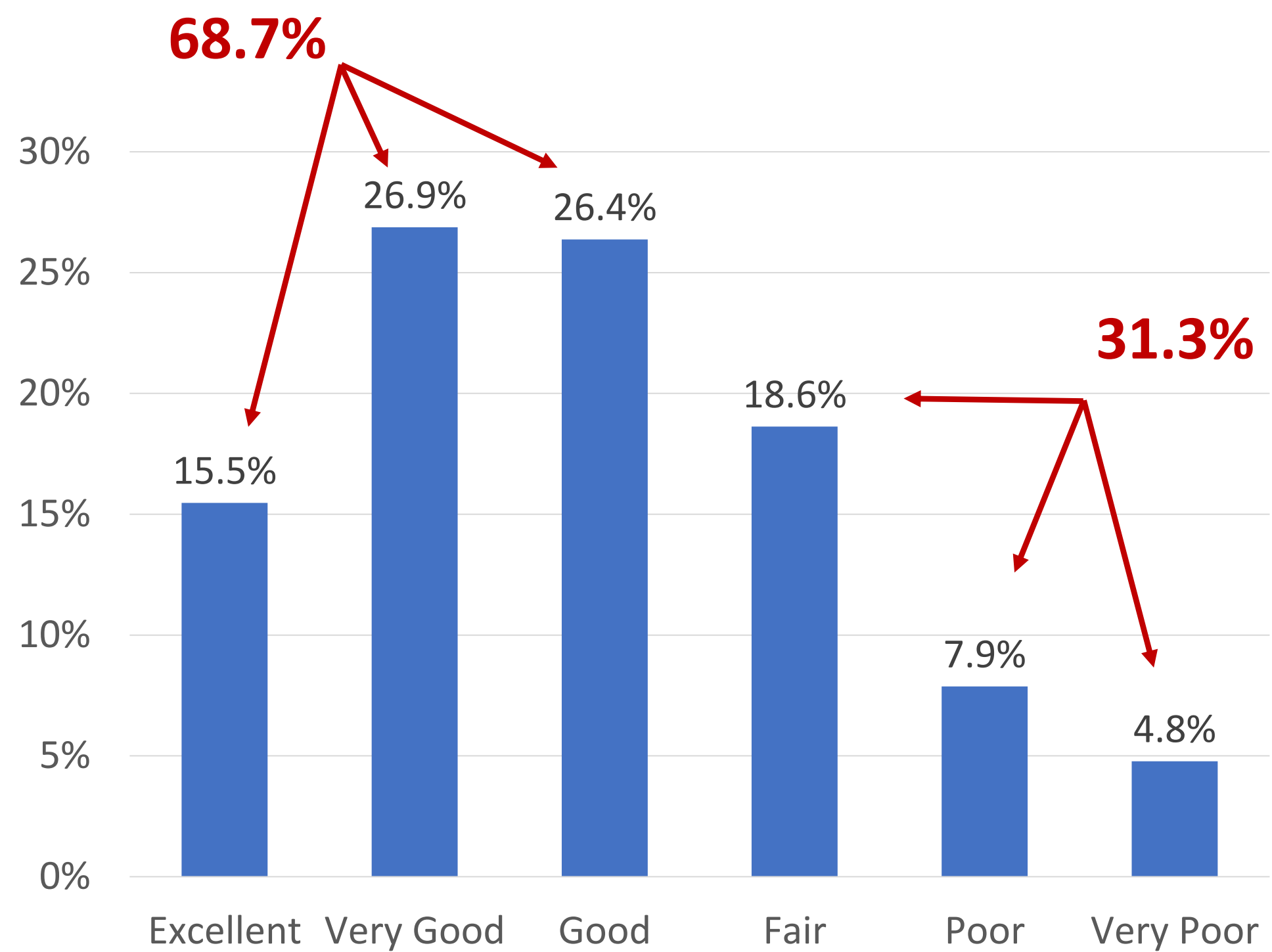
Performance of State Government Officials

Managing Government Response to Pandemic



Question: Please rate the overall performance of your state government officials in managing government efforts to deal with the Coronavirus pandemic.

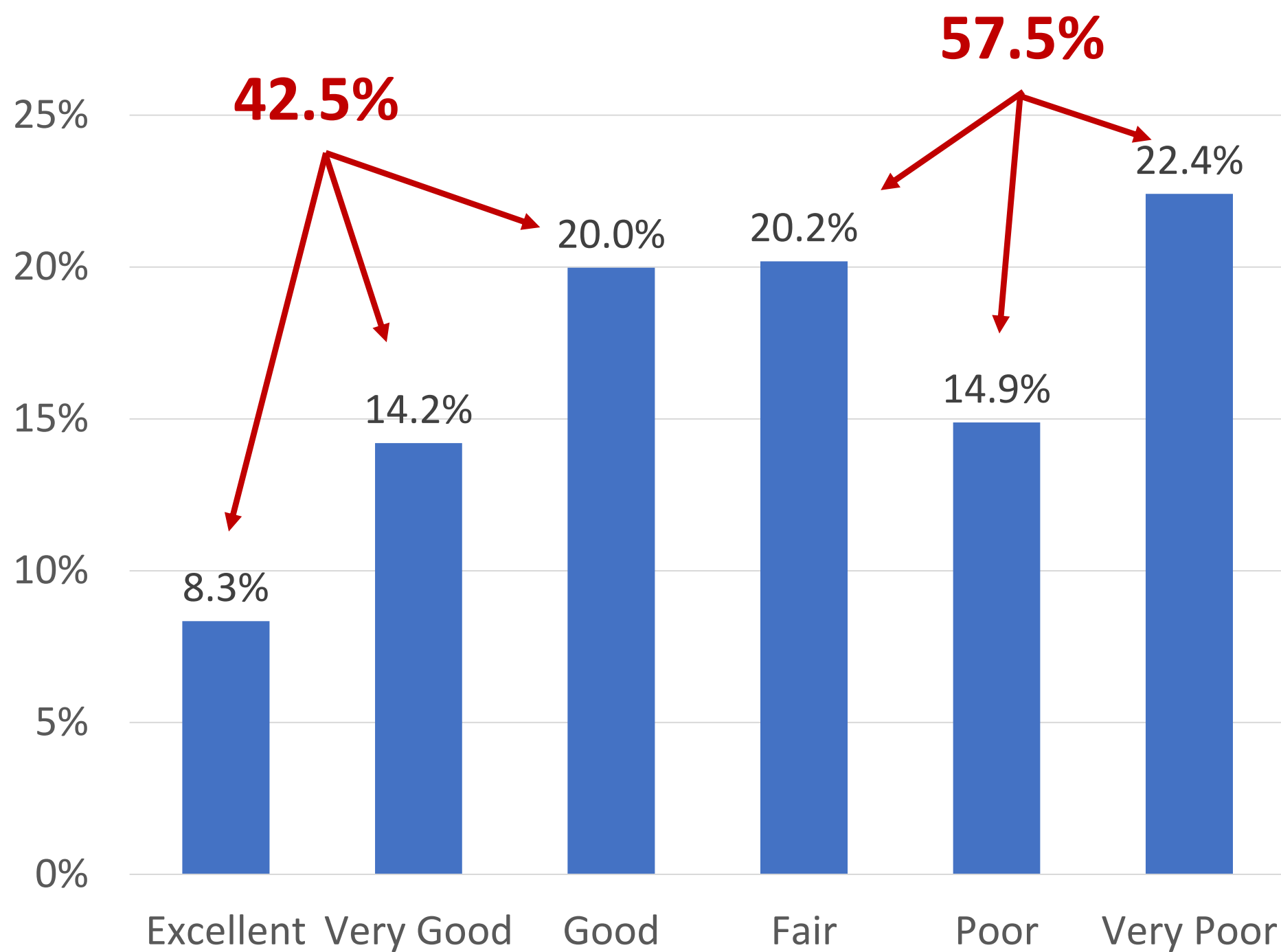
Communicating with the Public



Question: Please rate the overall performance of your state government officials in communicating with the public during the Coronavirus pandemic.

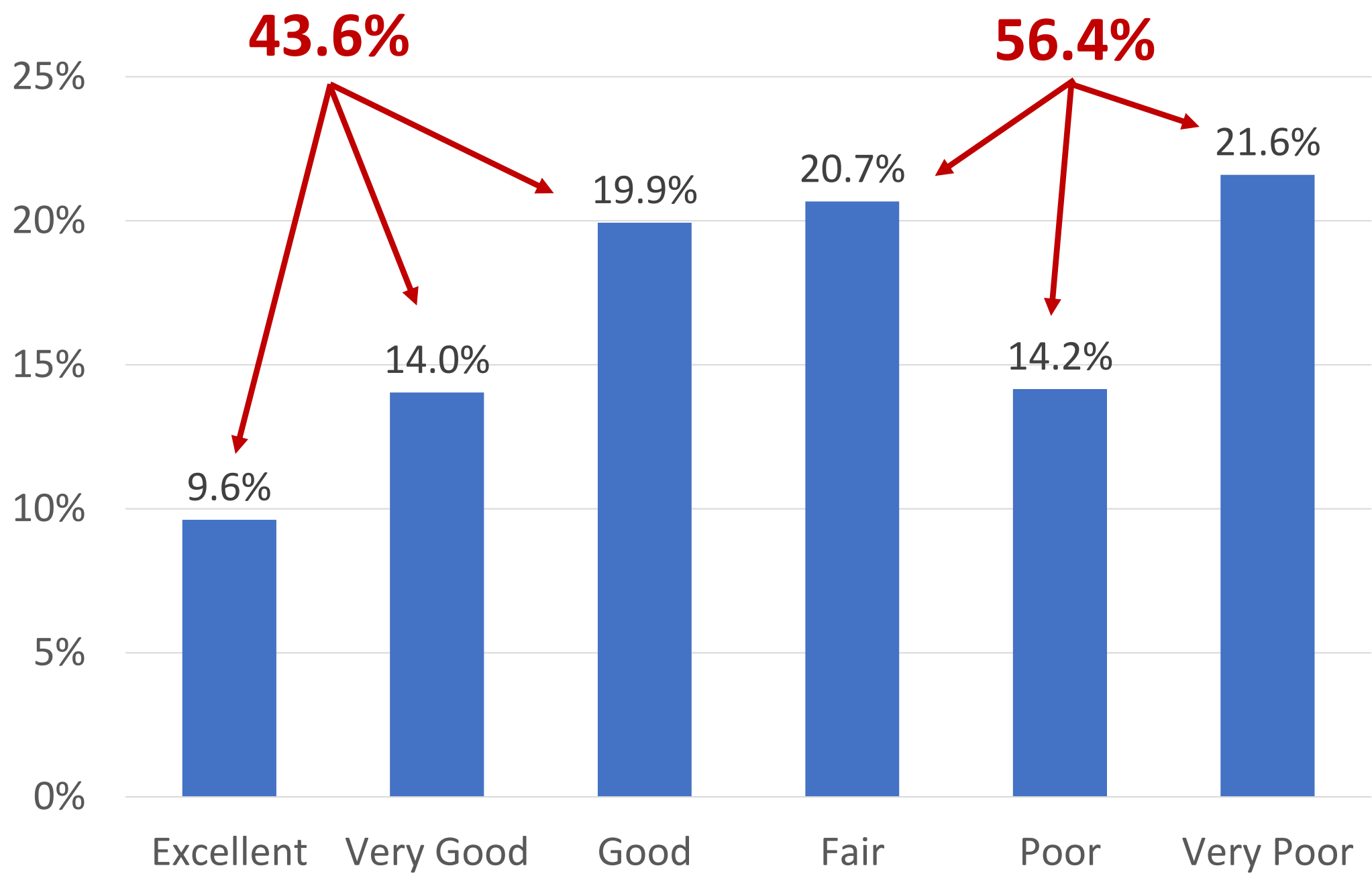
Performance of U.S. Federal Government Officials

Managing Government Response to Pandemic



Question: Please rate the overall performance of U.S. Federal government officials in managing government efforts to deal with the Coronavirus pandemic.

Communicating with the Public

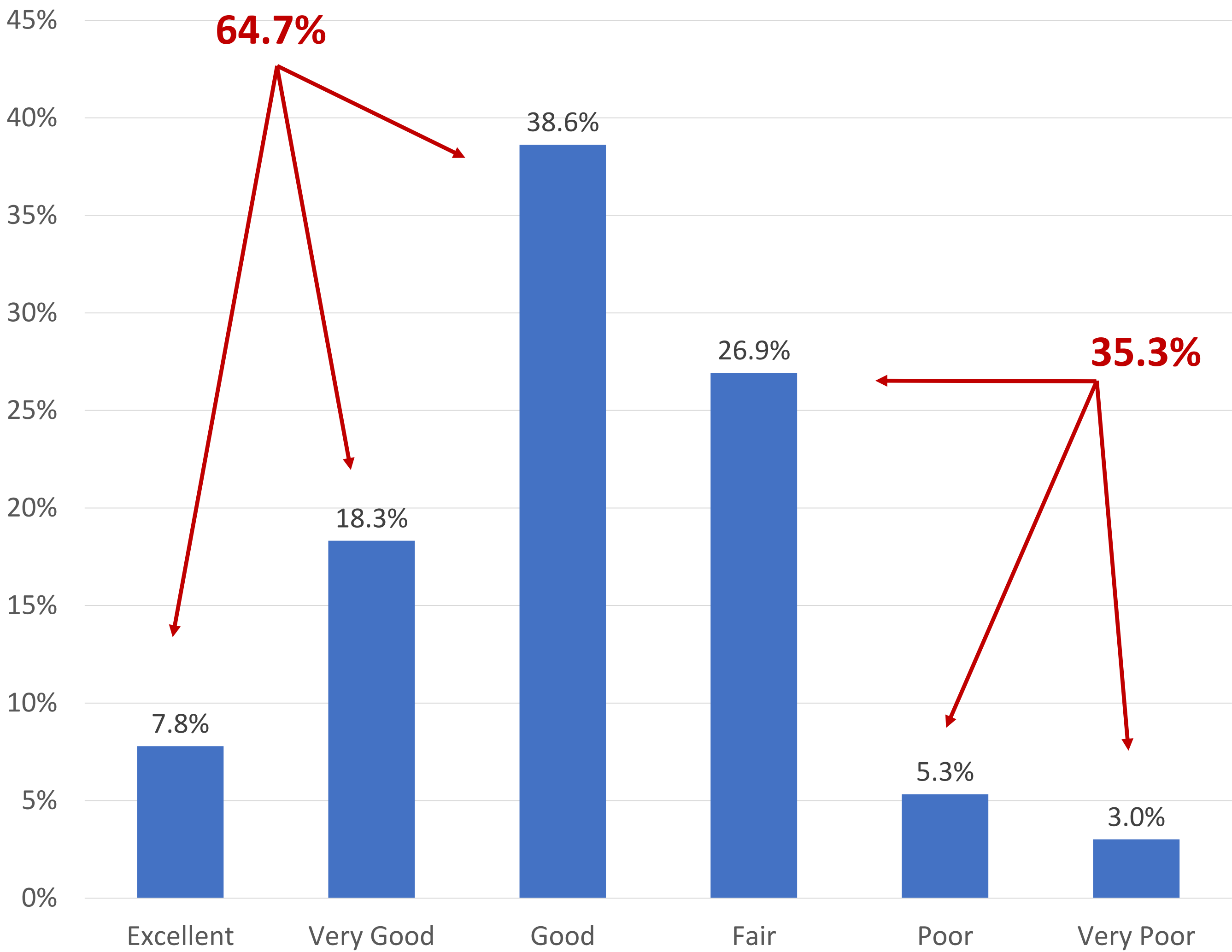


Question: Please rate the overall performance of U.S. Federal government officials in communicating with the public during the Coronavirus pandemic.

Hotel Industry: Communicating Safety Measures

Question: Please rate the overall performance of the hotel industry in communicating measures they have taken to keep travelers safe from the Coronavirus.

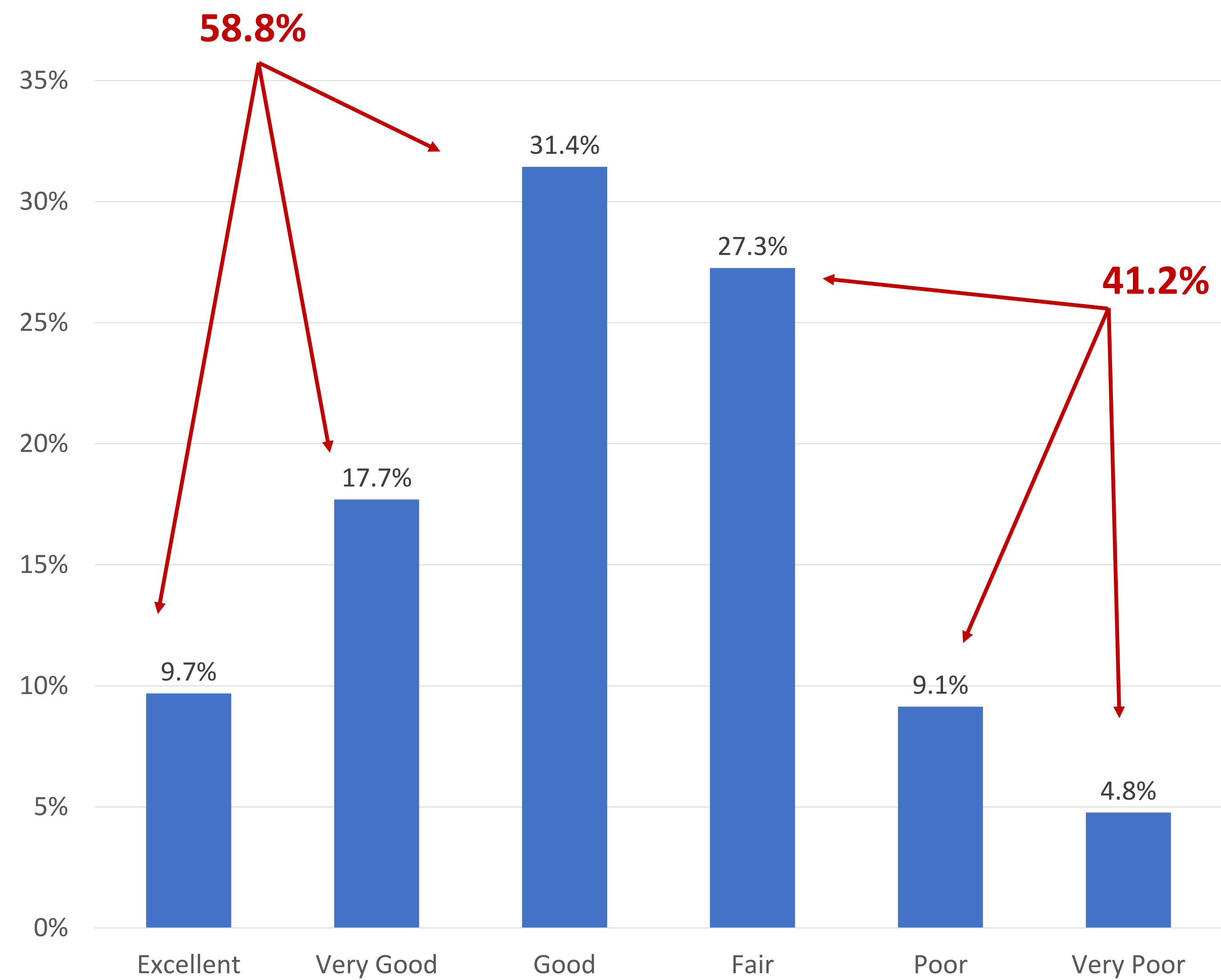
(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



Airline Industry: Communicating Safety Measures

Question: Please rate the overall performance of the airline industry in communicating measures they have taken to keep travelers safe from the Coronavirus.

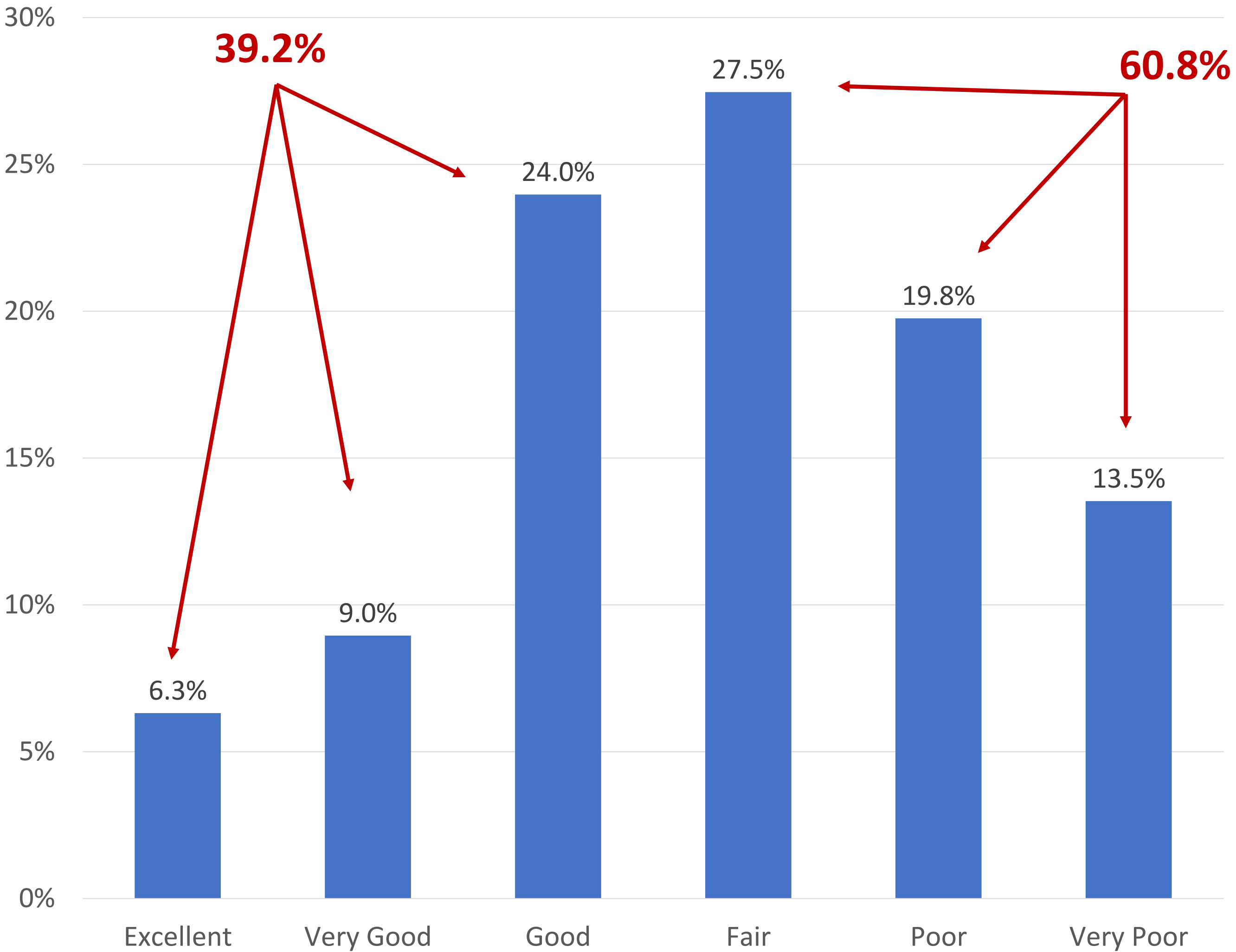
(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



Cruise Industry: Communicating Safety Measures

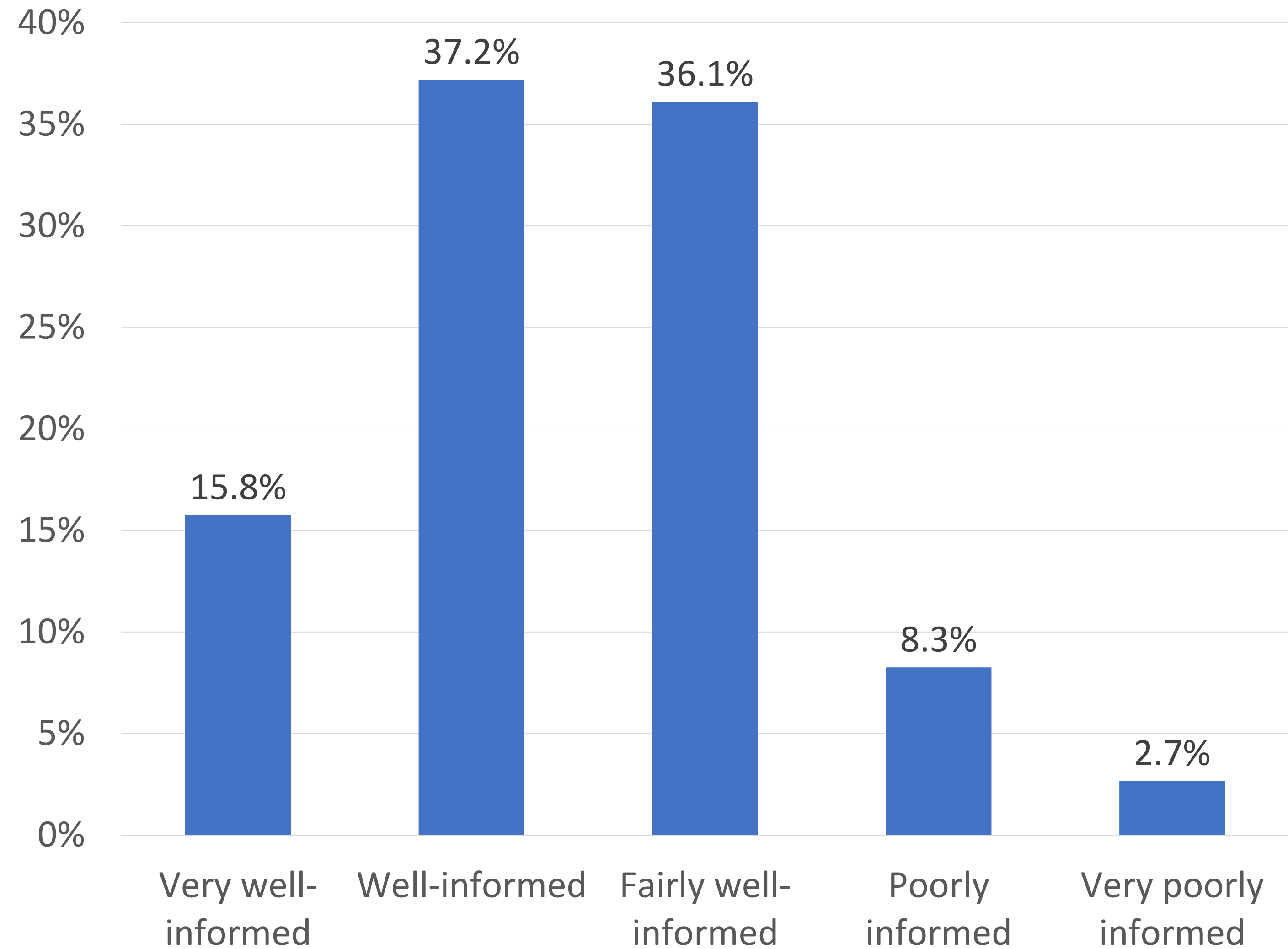
Question: Please rate the overall performance of the cruise industry in communicating measures they have taken to keep travelers safe from the Coronavirus.

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



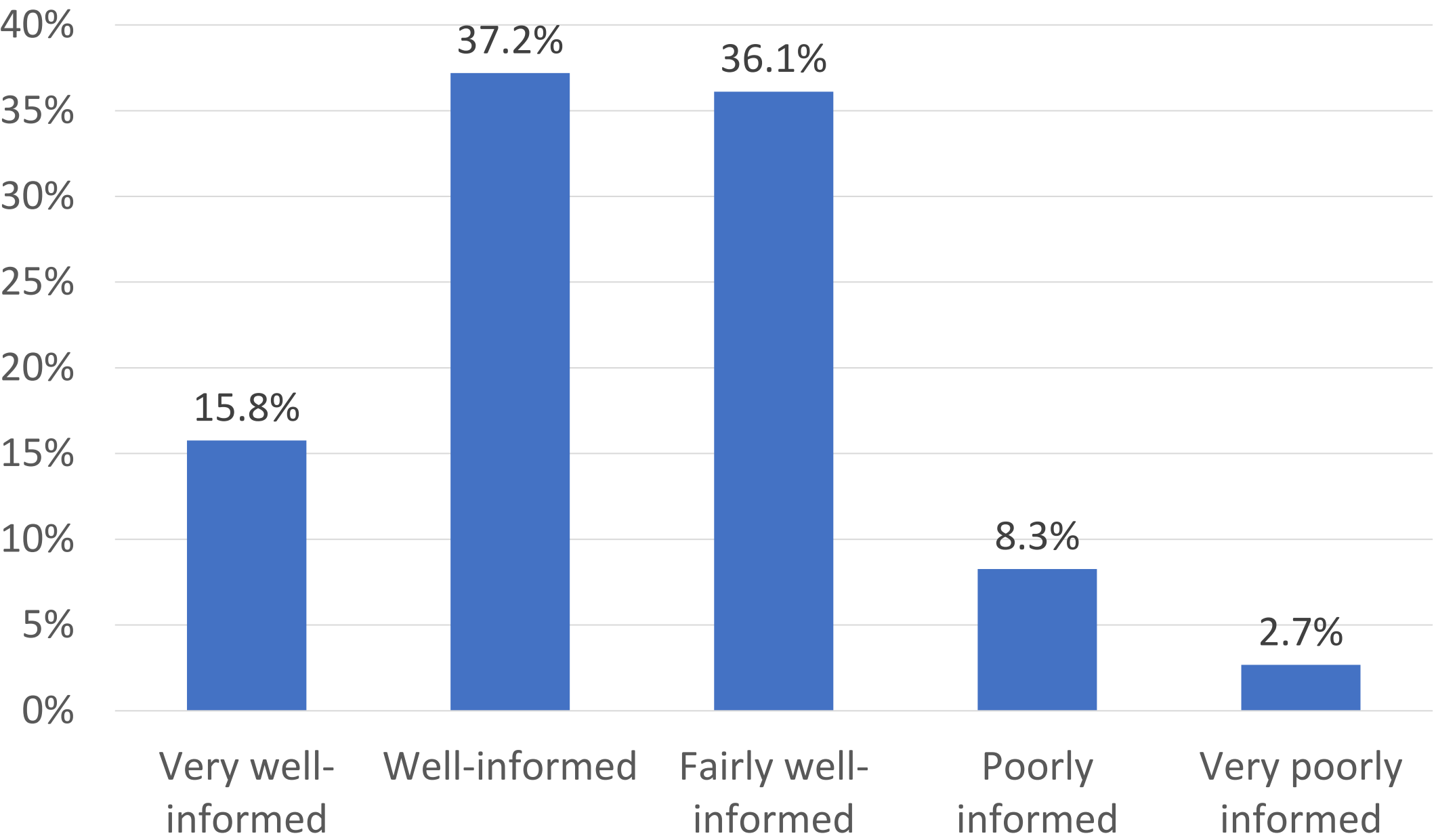
Personal Knowledge of Coronavirus Risks While Traveling

Question: Overall, how well-informed do you feel you personally are about any potential Coronavirus-related risks involved with traveling?

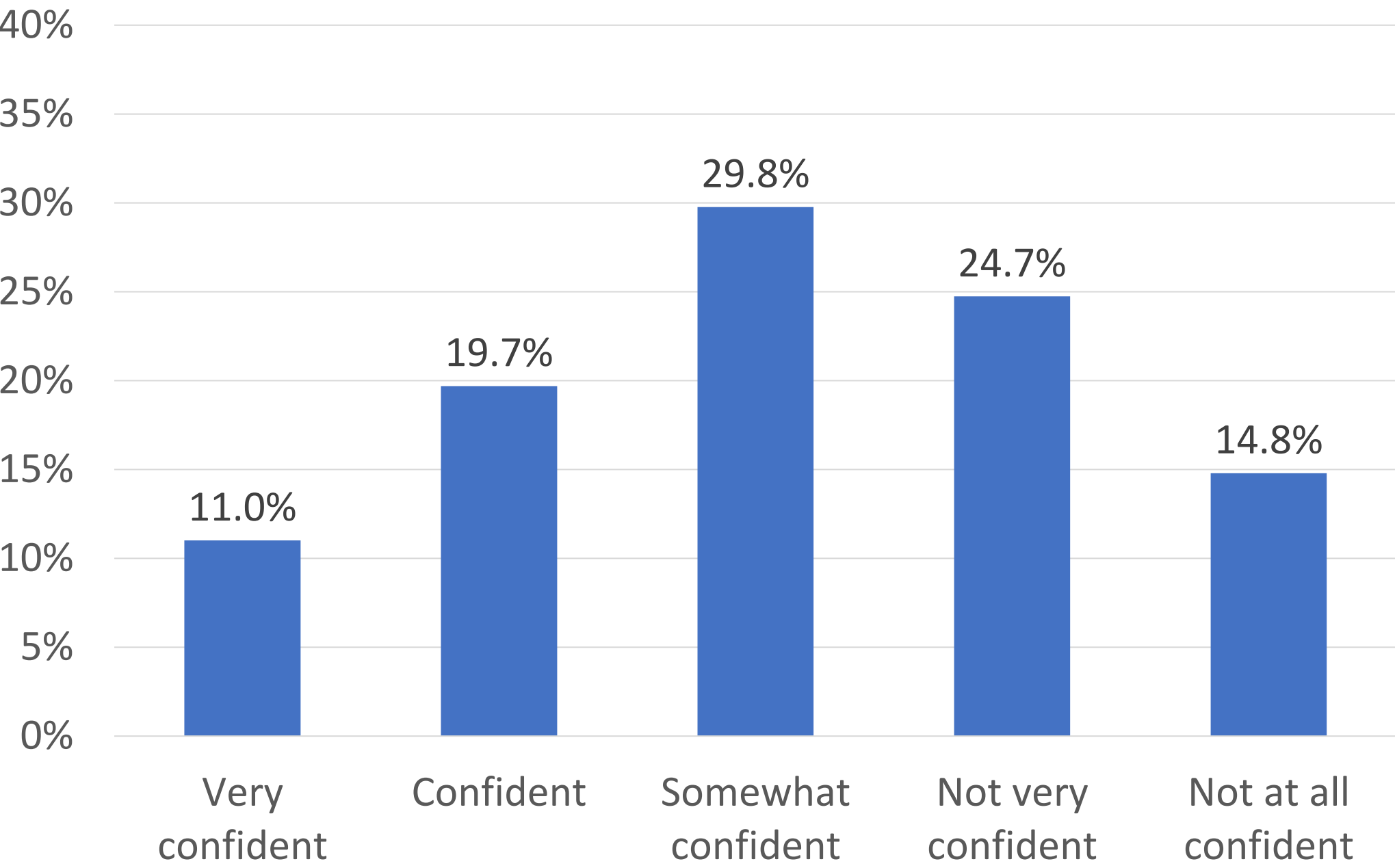


Personal Knowledge and Confidence in Traveling Safely

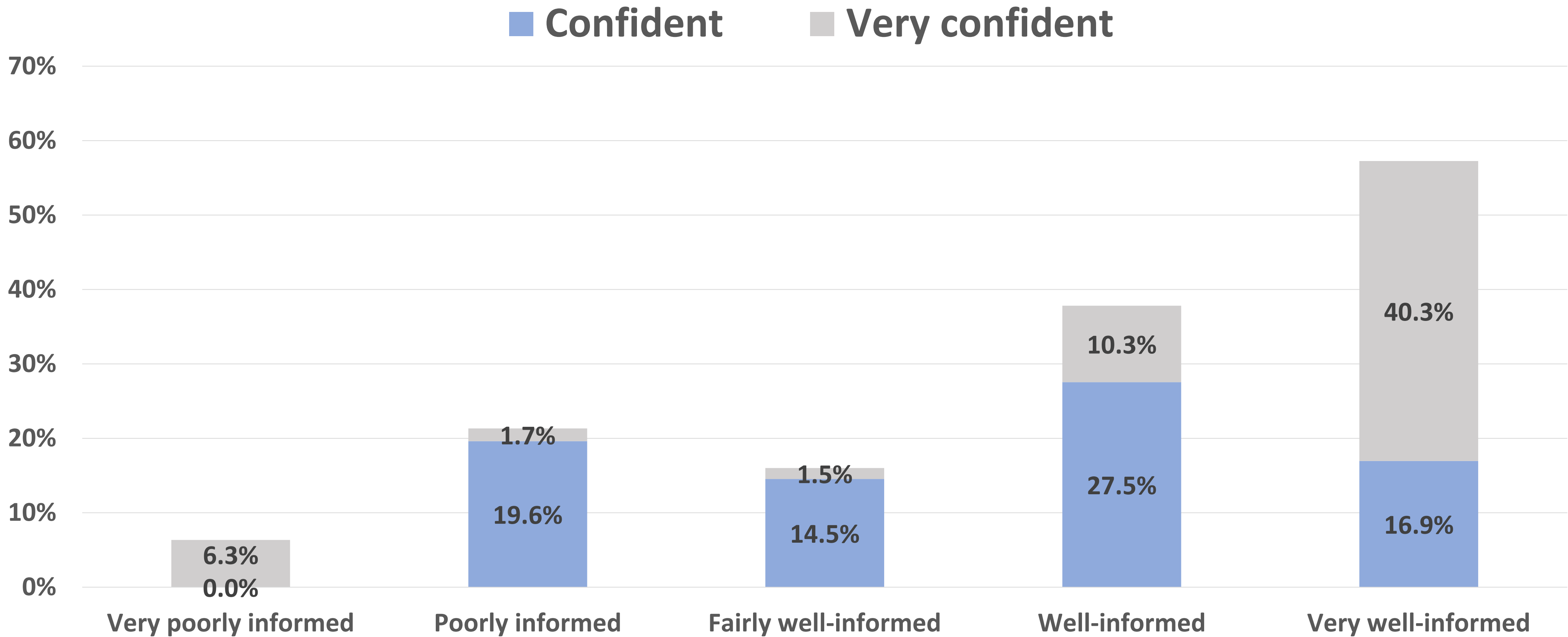
Question: Overall, how well-informed do you feel you personally are about any potential Coronavirus-related risks involved with traveling?



Question: How confident are you that you could travel safely in the current environment?



More Information = More Confidence



KEY TAKEAWAYS

- The majority of travelers show some level of satisfaction with how their city and state governments have managed the Coronavirus pandemic. The Federal government's response to the pandemic received significantly lower scores
- For most travelers, the hotel and airline industries were seen as effectively communicating measures they have made to keep travelers safe. The cruise industry received lower overall evaluation from travelers
- More knowledge leads to greater travel confidence

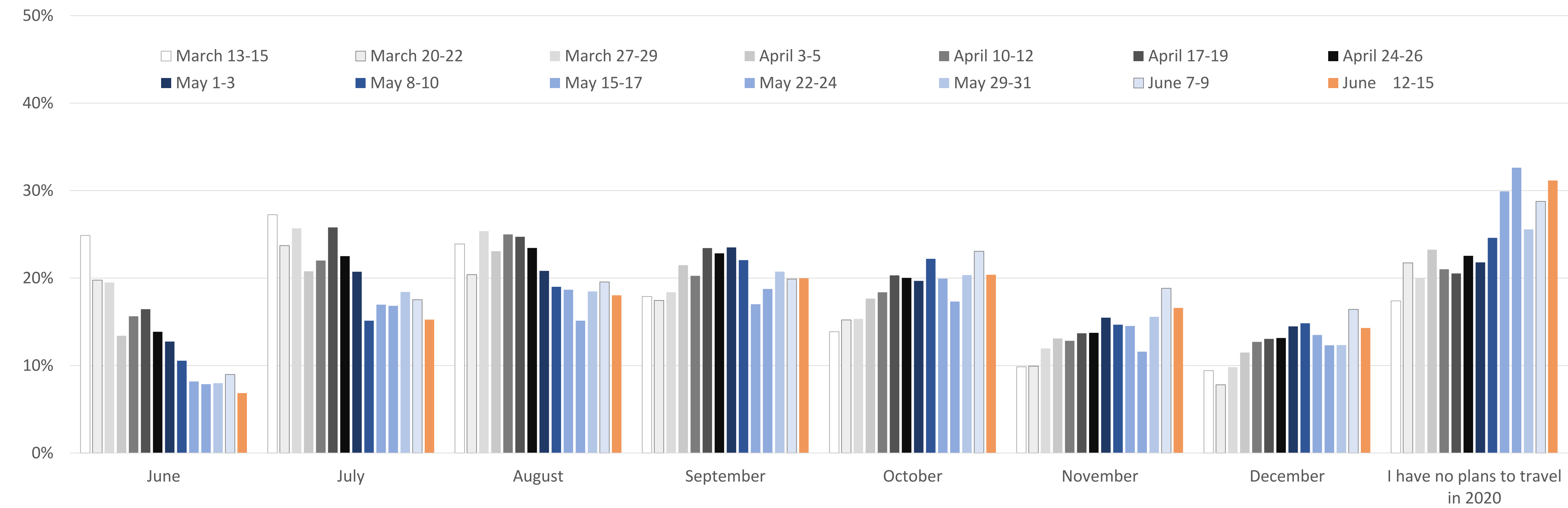


Traveling in the Pandemic



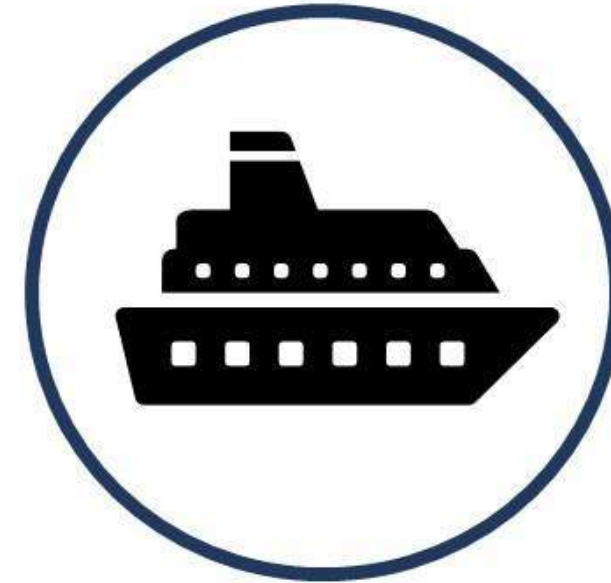
Upcoming Travel Plans

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

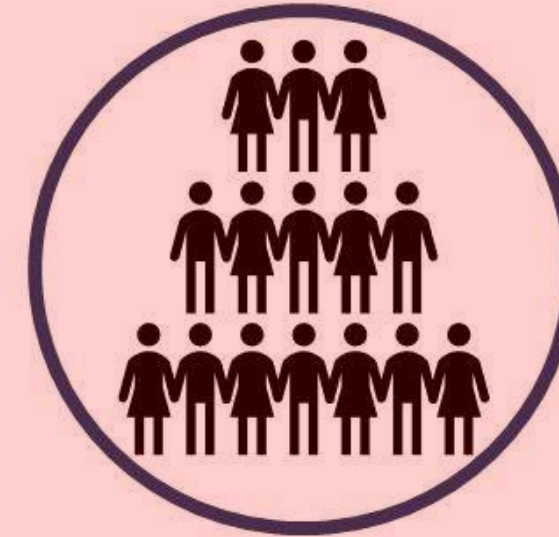


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)

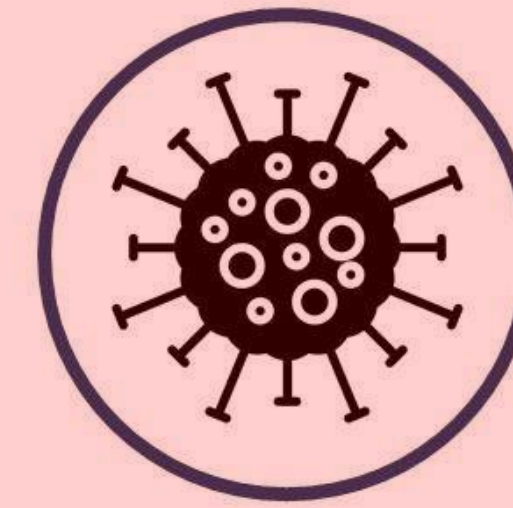
THE PANDEMIC'S INFLUENCE ON TRAVEL: WHAT AMERICANS SAY THEY WILL AVOID WHEN TRAVELING THIS YEAR



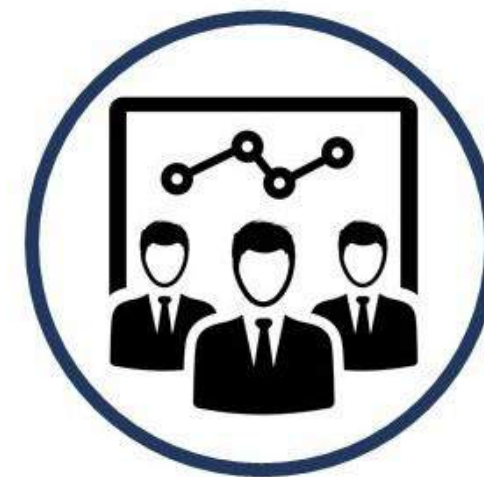
CRUISES
(55.6 %)



**CROWDED
DESTINATIONS**
(52.6 %)



**AREAS HARDEST HIT
BY CORONAVIRUS**
(48.1 %)



**ATTENDING
CONFERENCES**
(45.9 %)



**PLACES WITH
SANITARY
ISSUES**
(43.8 %)



**SPECIFIC
FOREIGN
DESTINATIONS**
(38.7 %)



**AIR
TRAVEL**
(34.0 %)



**SPECIFIC U.S.
DESTINATIONS**
(32.2 %)



**DESTINATIONS
SLOW TO SOCIAL
DISTANCE**
(25.9 %)

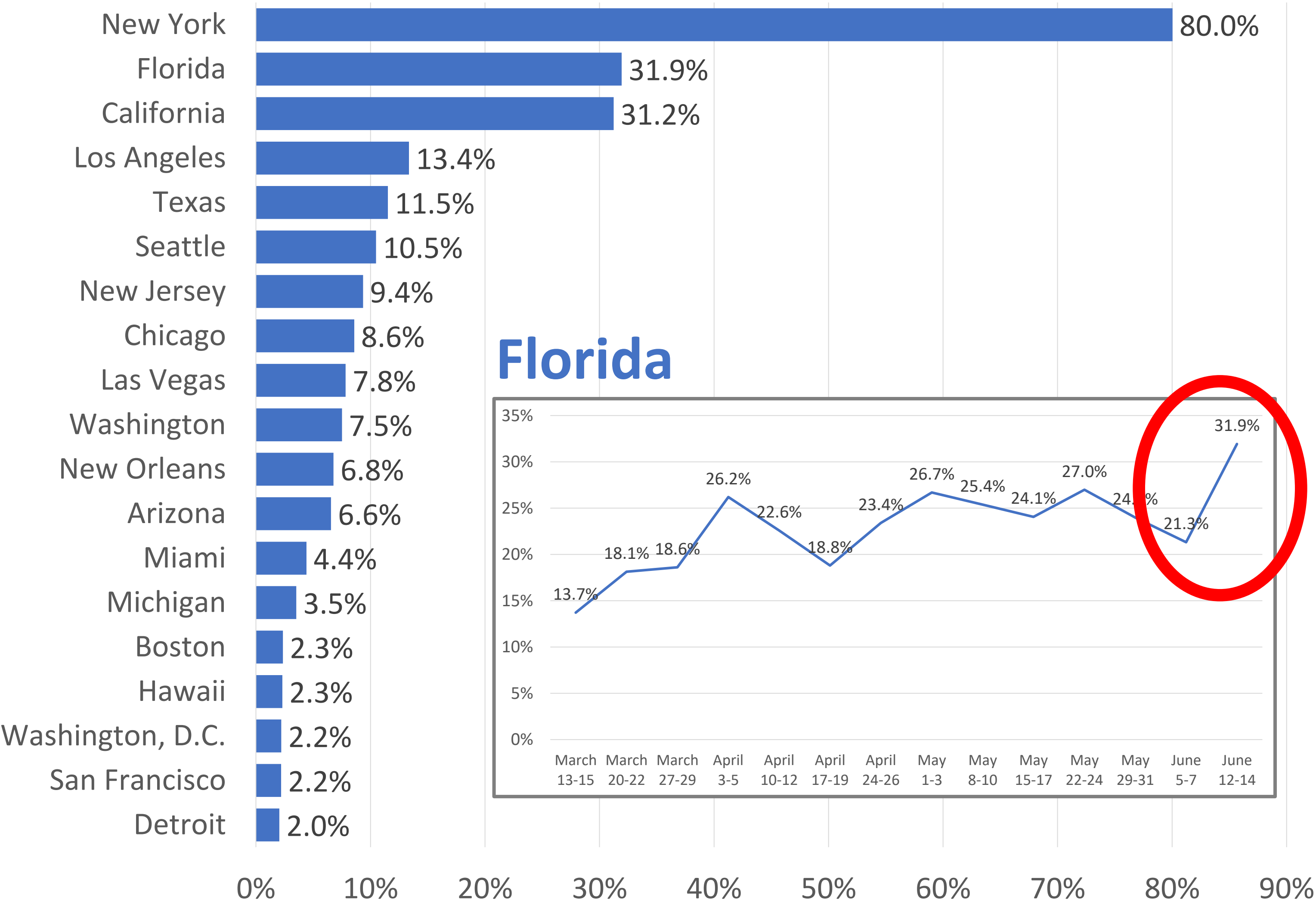



**CITIES &
URBAN
AREAS**
(25.4 %)

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 14: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



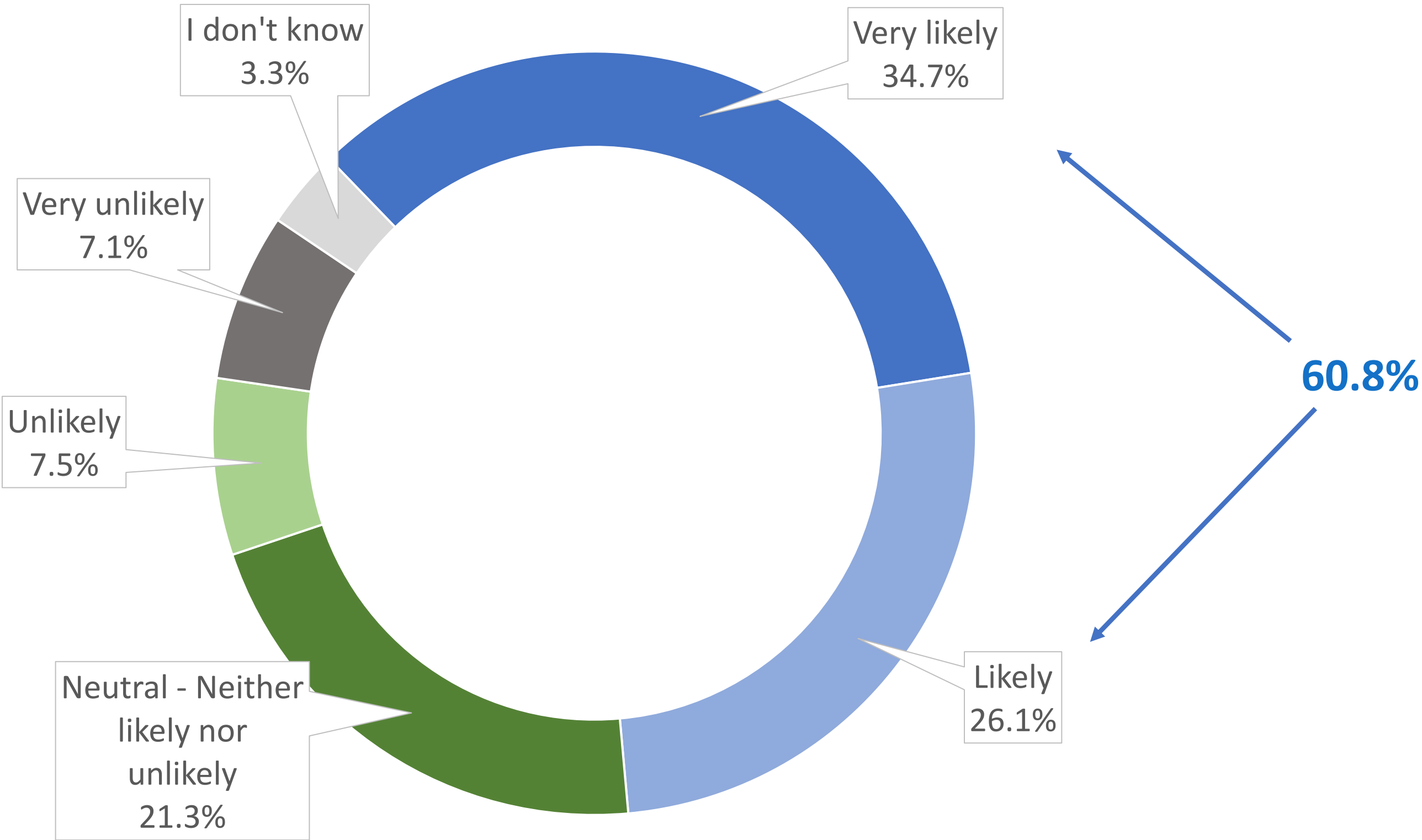
A group of four young people are gathered outdoors, looking at a large map held by one of them. The group consists of a man in a plaid shirt, a woman with long blonde hair, a man with glasses, and a woman with dark hair. They are all smiling and appear to be in a good mood. The background is slightly blurred, showing what looks like a beach or a park setting. The text is overlaid in the center of the image.

Are travelers looking for new destinations or seeking the comfort of ones they already know?

Next Leisure Trip: New Destination or One Already Visited

Question: On your NEXT LEISURE TRIP, how likely is it that your primary destination will be one you have visited before?

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

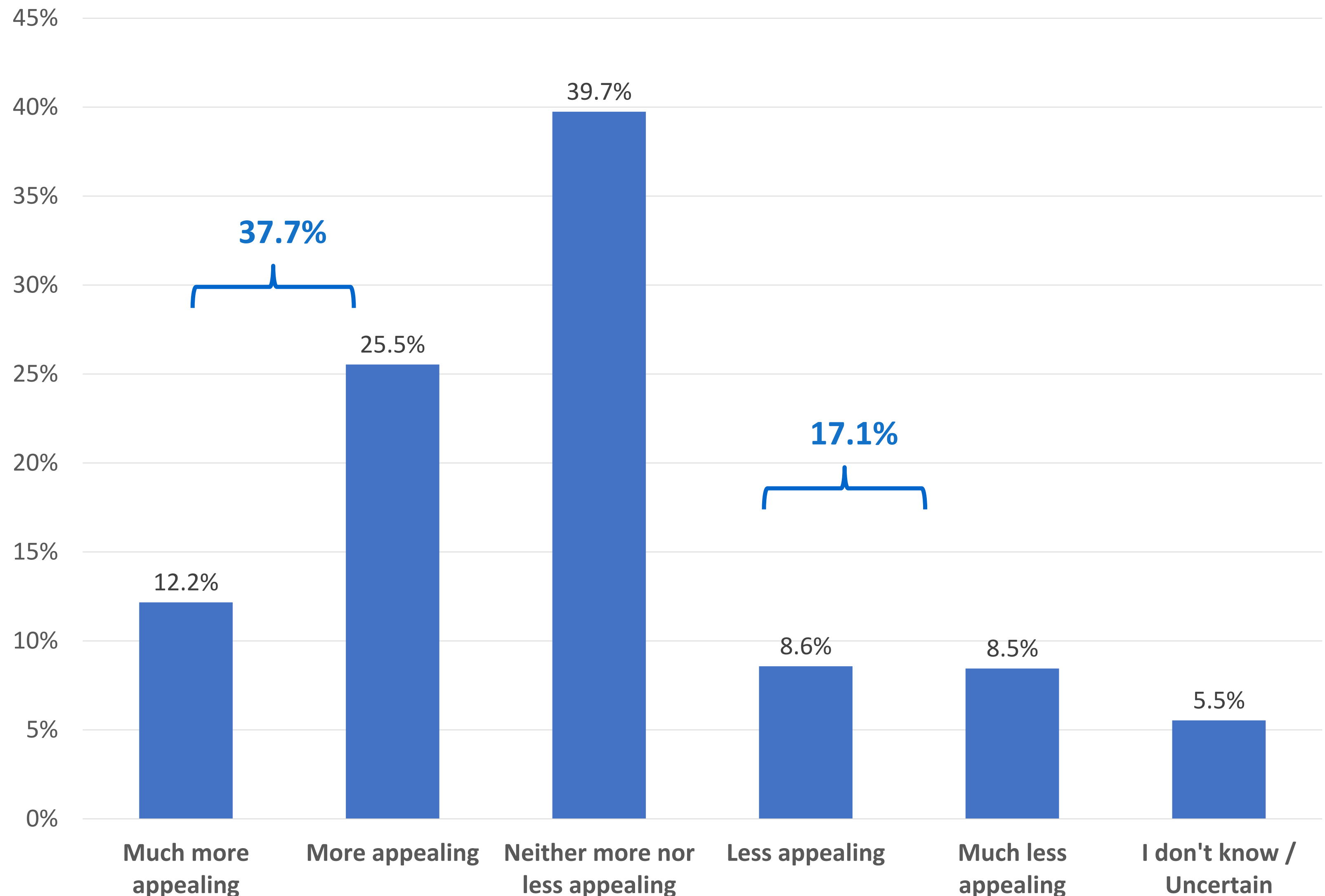


The Appeal of Familiar Destinations During the Pandemic

Question: Please think about your interest in visiting destinations for the first time versus destinations you are familiar with (because you previously visited).

In the current environment, destinations I am familiar with are _____

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



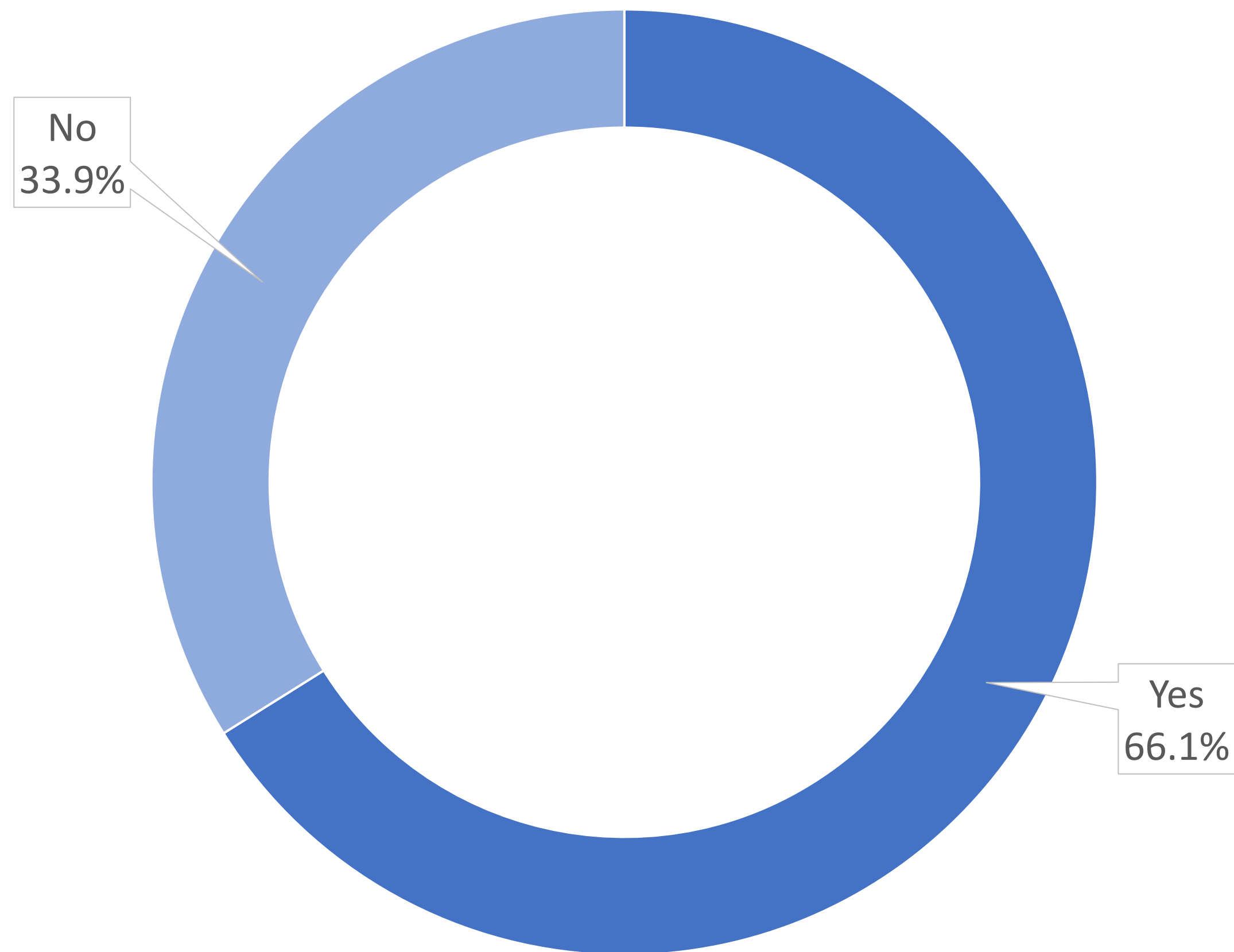
A high-angle, wide shot of a crowded swimming pool. The pool is filled with people of various ages, many of whom are sitting on colorful inflatable toys, including large yellow ducks and blue and pink floats. The pool is surrounded by a concrete deck where more people are standing and watching. The scene is bright and sunny, suggesting a summer day. The text "How does media coverage of crowding impact a destination?" is overlaid in white, bold, sans-serif font across the center of the image.

**How does media coverage of crowding
impact a destination?**

Recall of Media Coverage of Crowded Travel Destinations

Question: Have you seen any recent media coverage of travel destinations that were crowded or where people were not maintaining appropriate distance from each other?

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

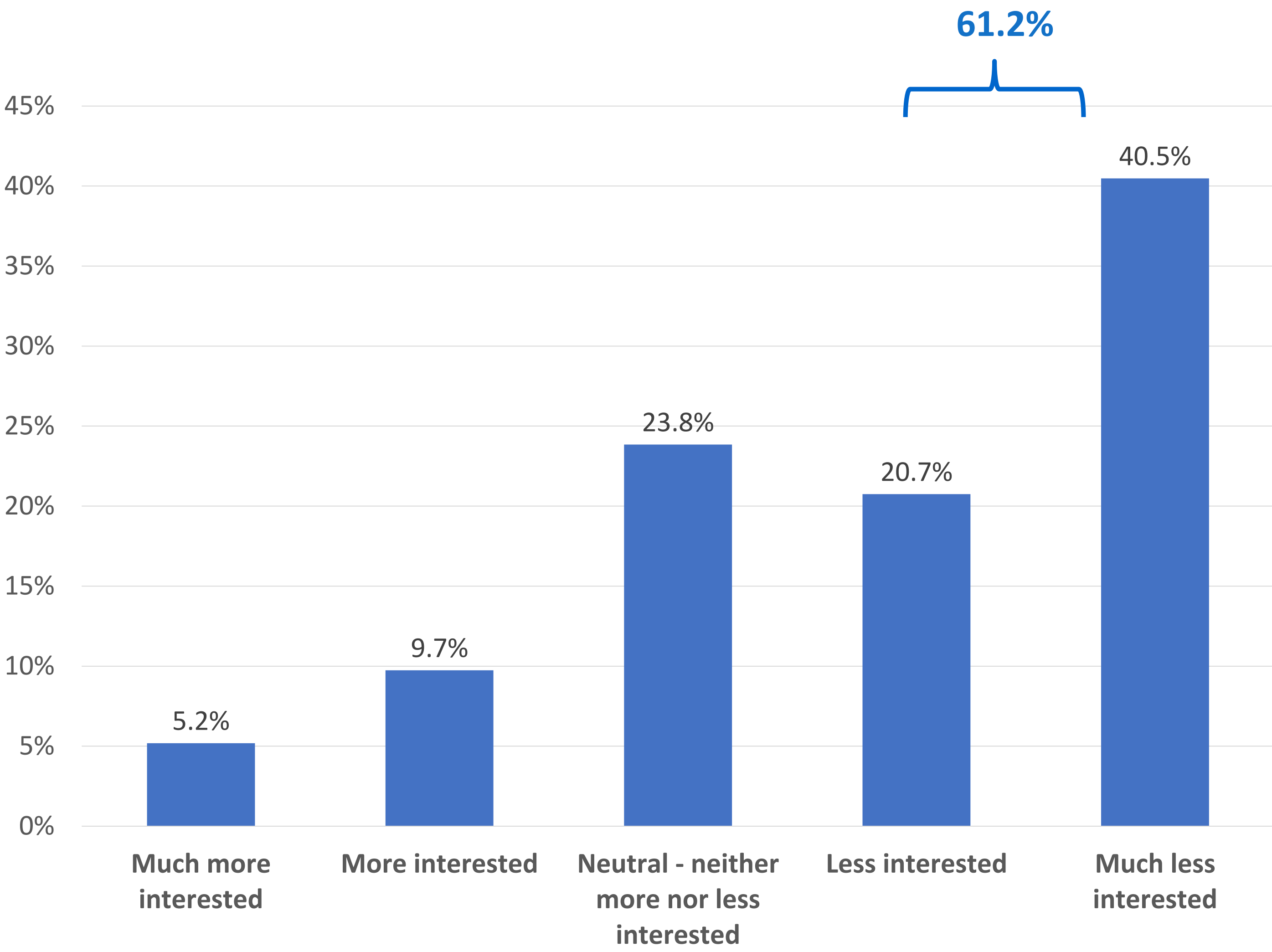


Effect of Crowding on Interest in Visitation

Question: Think of a destination you are interested in visiting. If you saw media coverage of that destination being crowded or where people were not maintaining appropriate distance from each other, how would it affect your interest in visiting? (Fill in the blank)

I would be _____ in visiting.

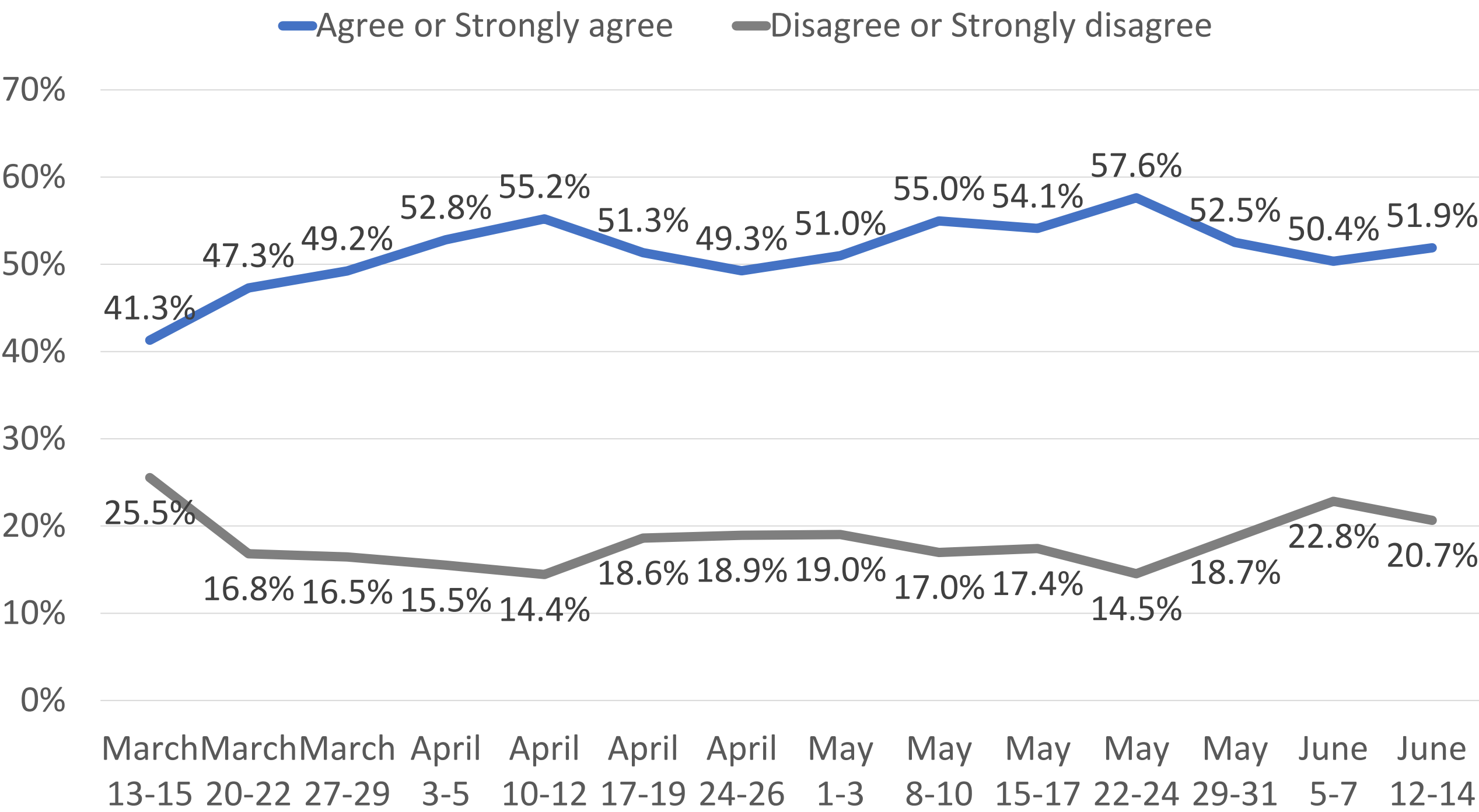
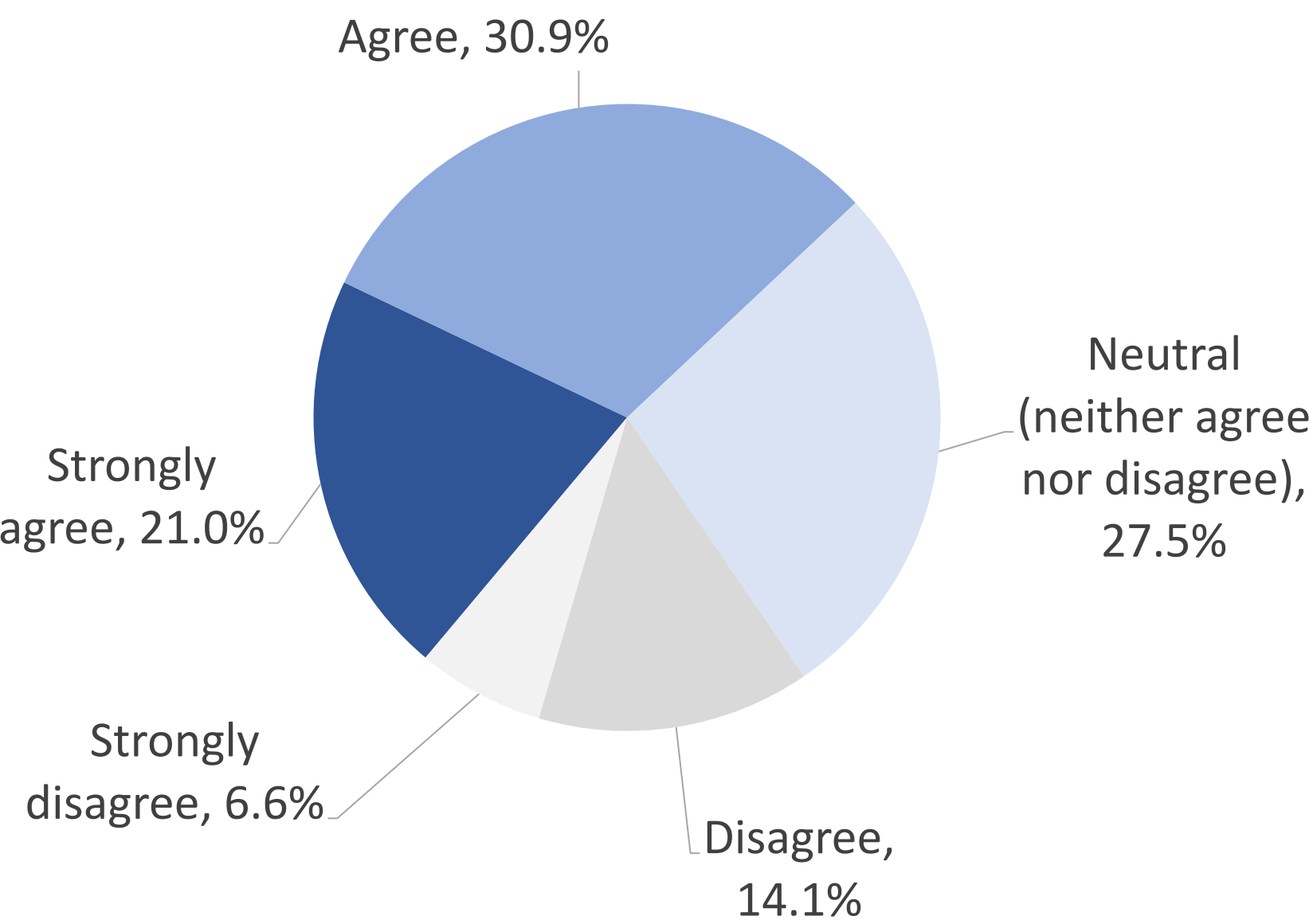
(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



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).

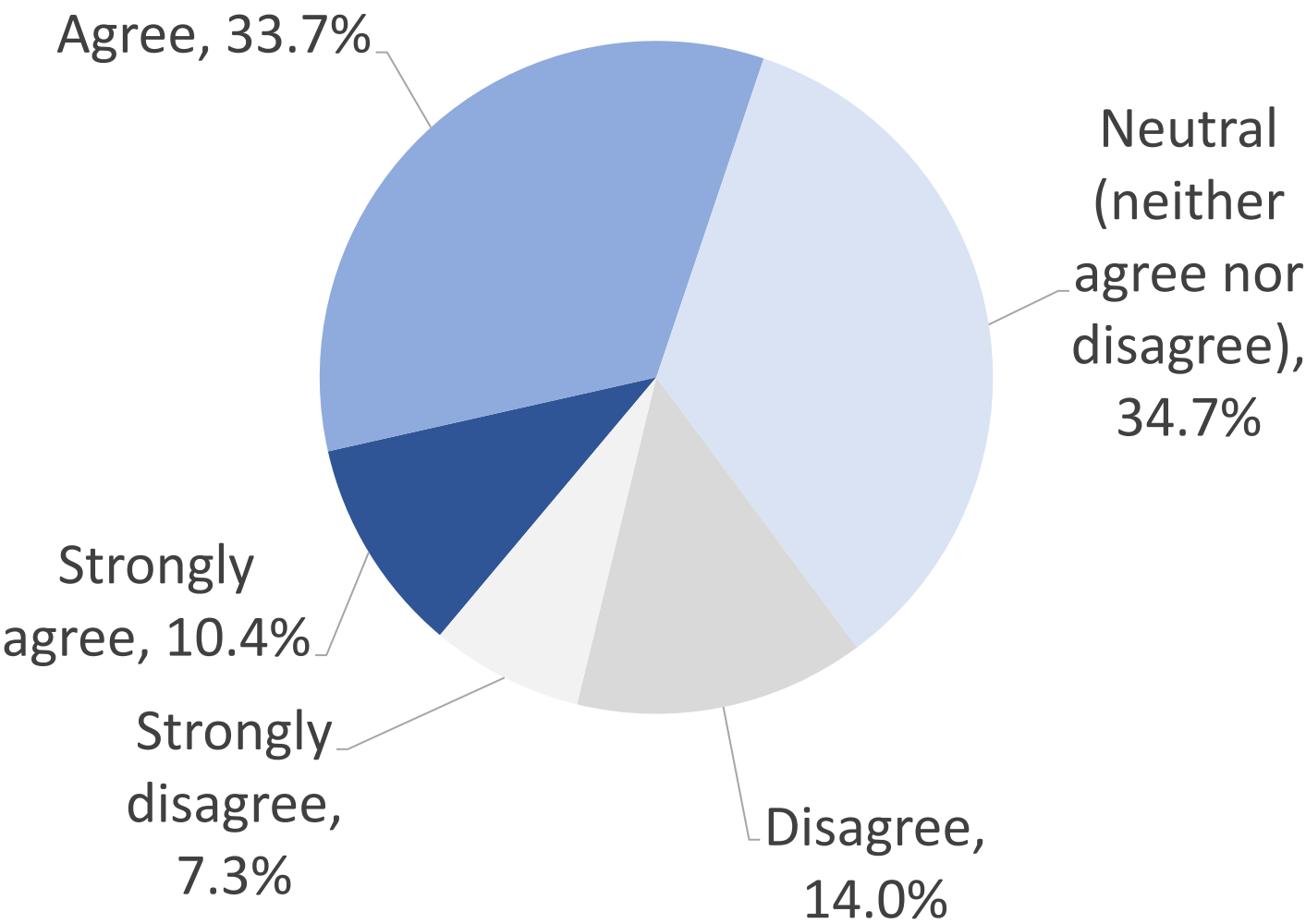


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)

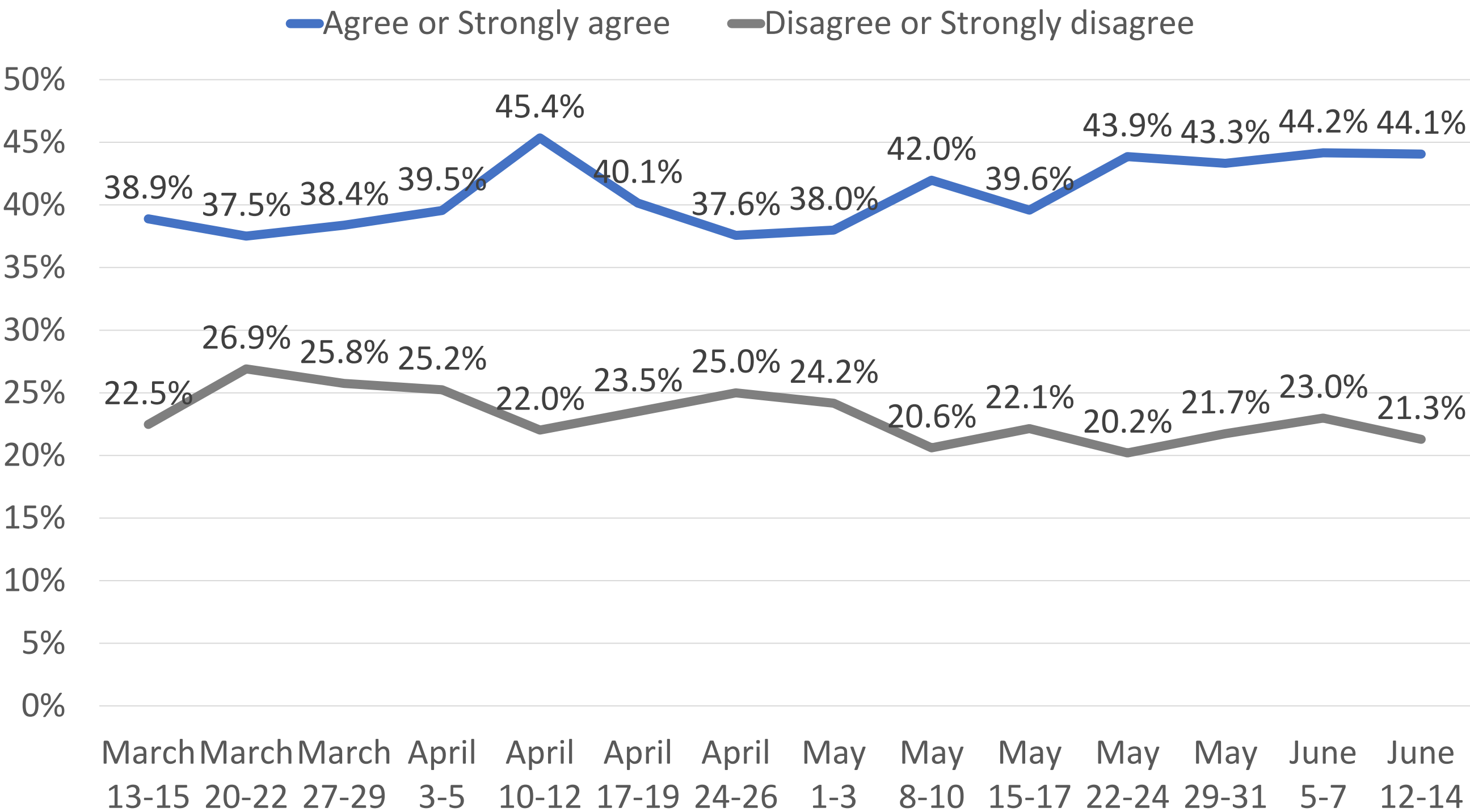
Replacing Air Travel With Road Trips

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.



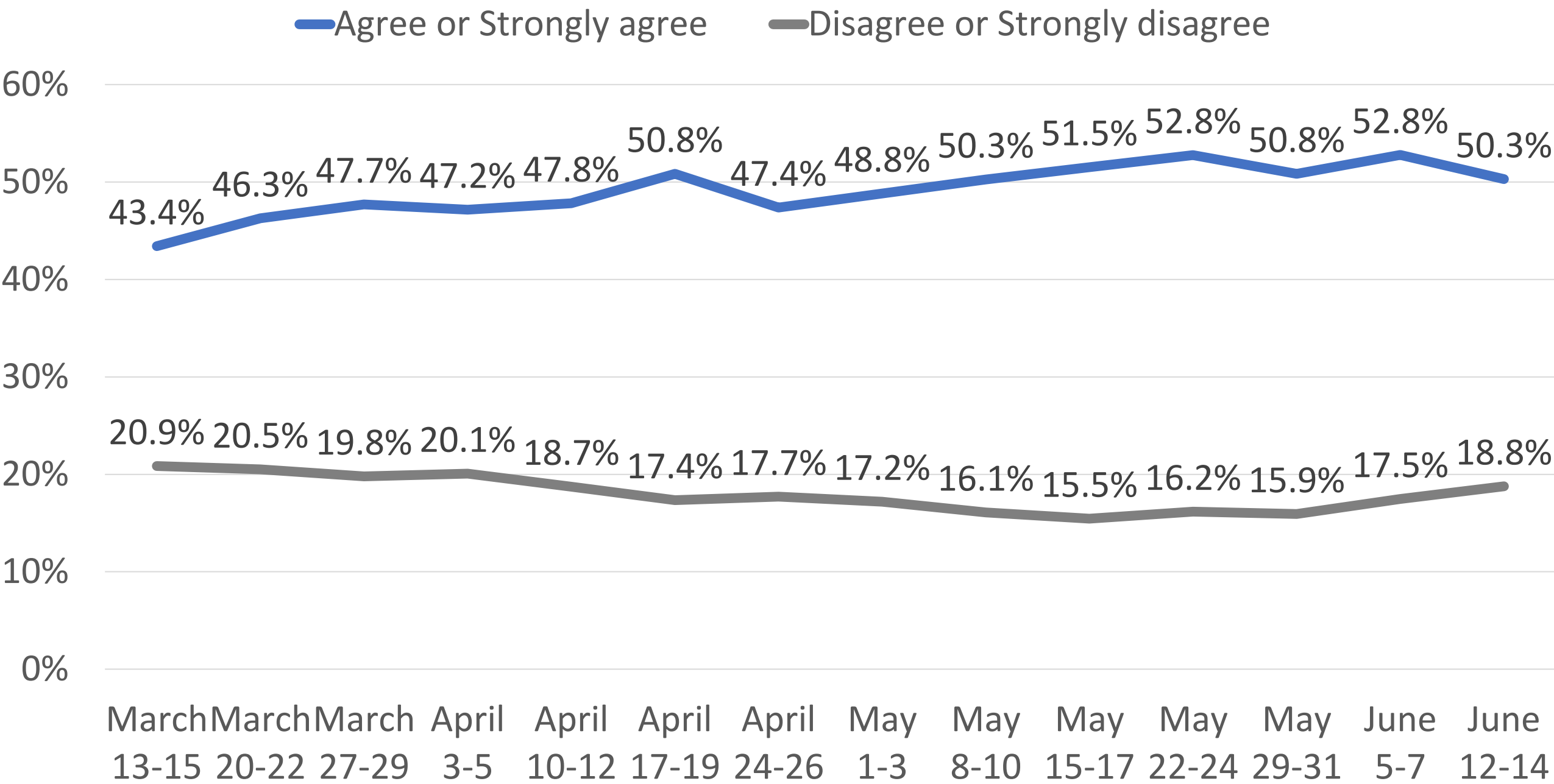
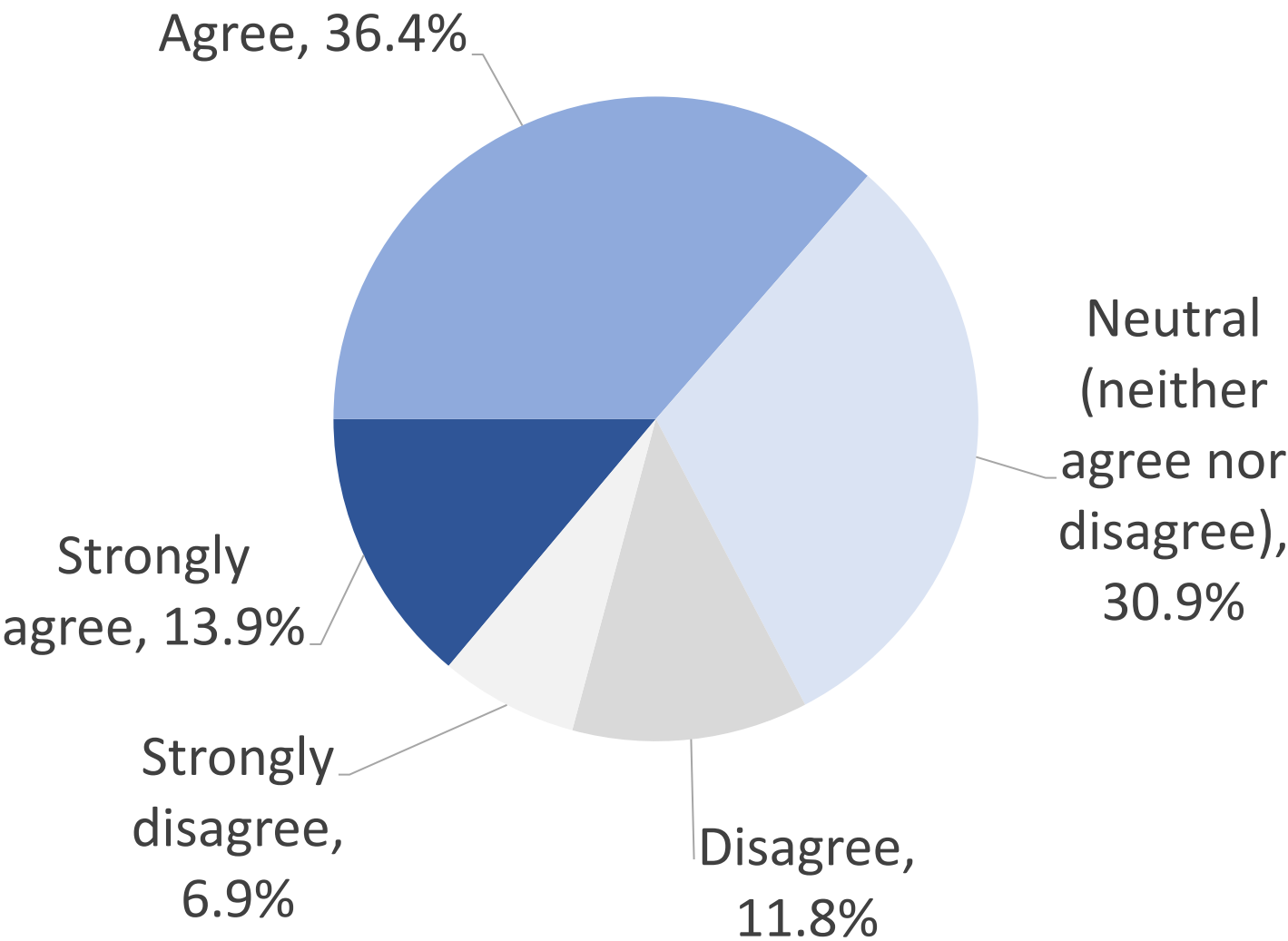
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)



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).

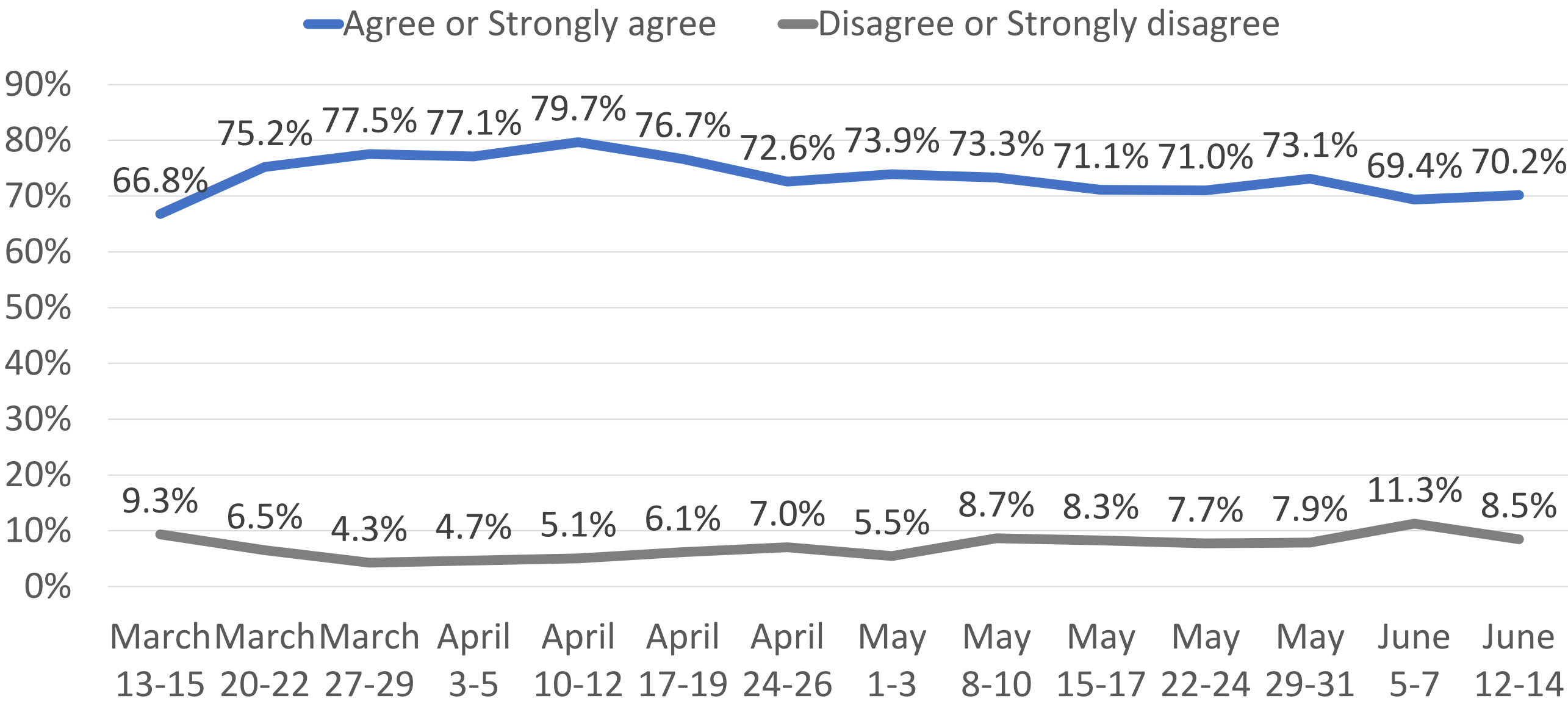
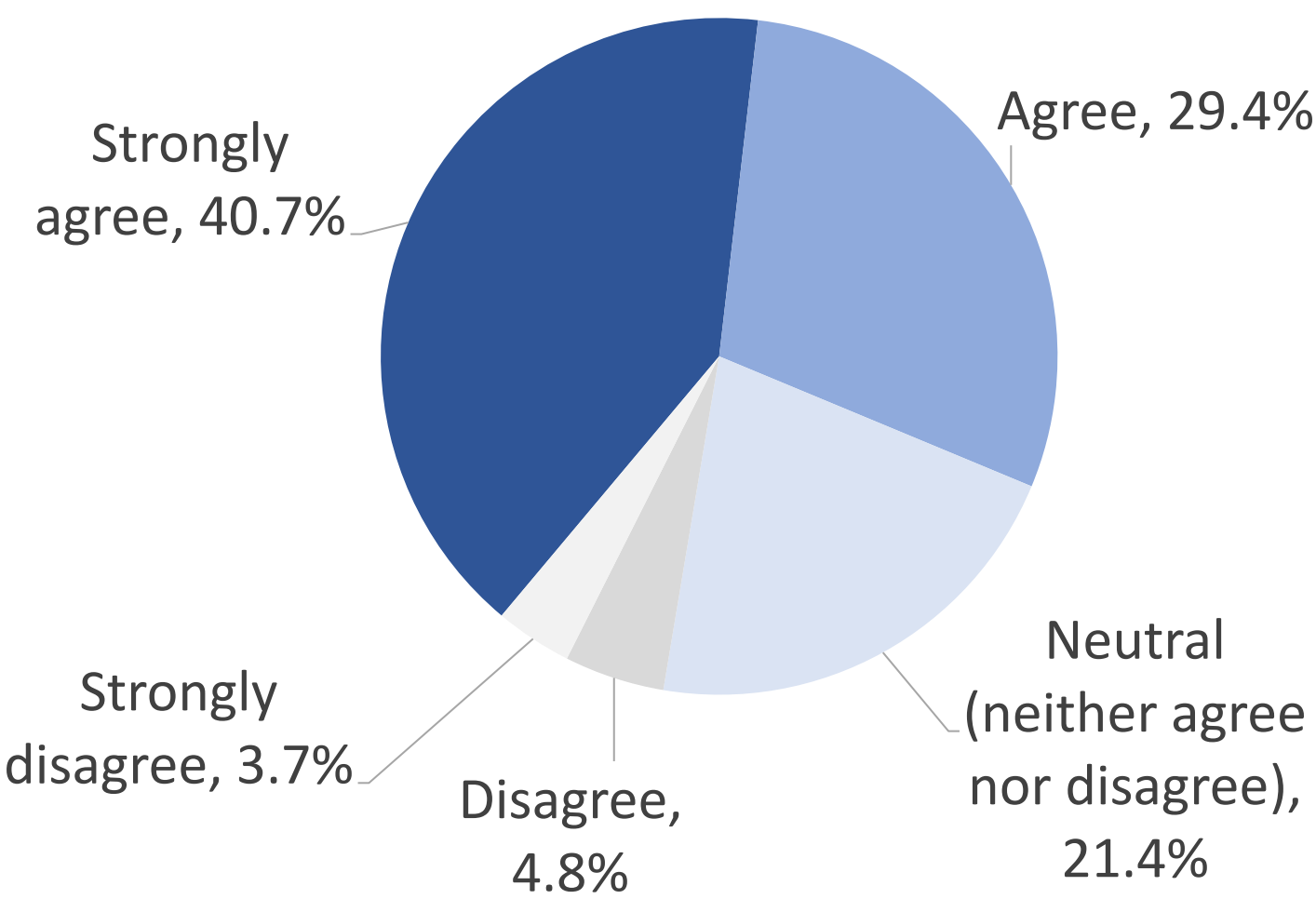


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)

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.

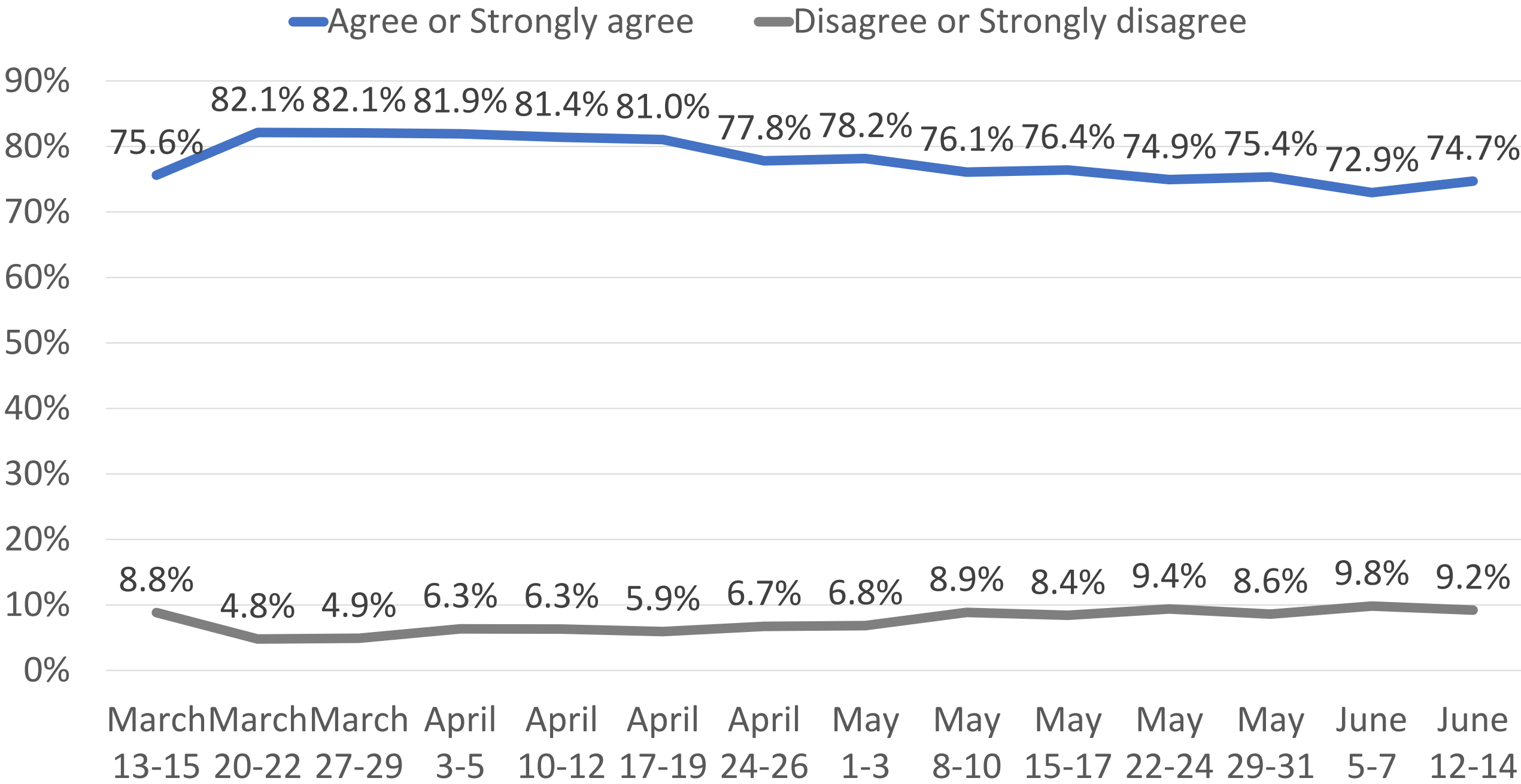
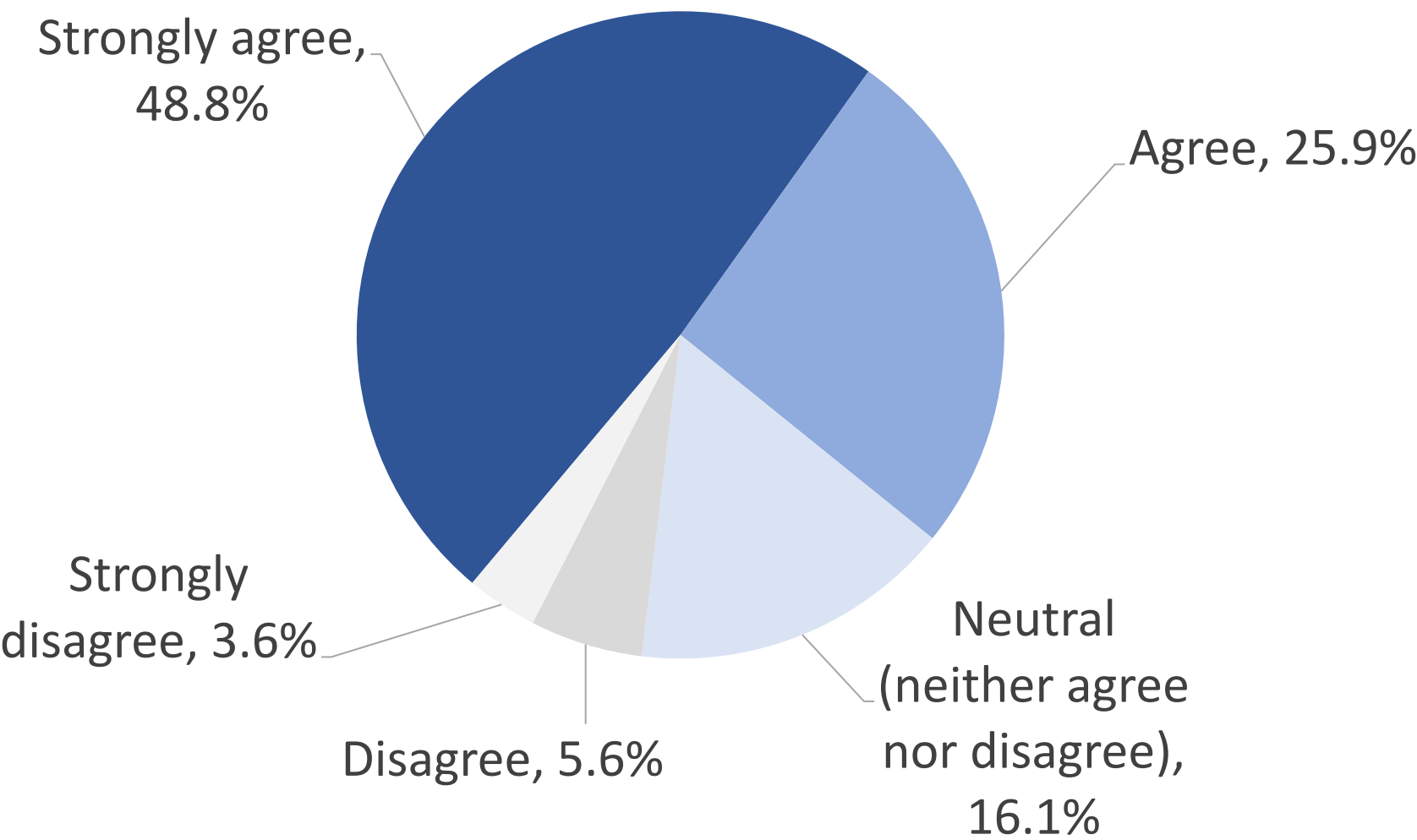


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7 and 12-14, 2020)

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, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214 and 1,214 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 and 12-14, 2020)



KEY TAKEAWAYS

- **During the pandemic, the comfort of knowing a place seems to be highly-valued. Much travel in the upcoming year will be to destinations with which travelers are familiar**
- **As Americans continue to want to avoid crowds while traveling, being portrayed as a crowded place (or one where safety protocols are ignored) is indeed bad news for a destination's brand**
- **Staycations, road trips and regional travel continue to be likely summer options for many. Smaller proportions see international or convention/conference travel as options this year.**

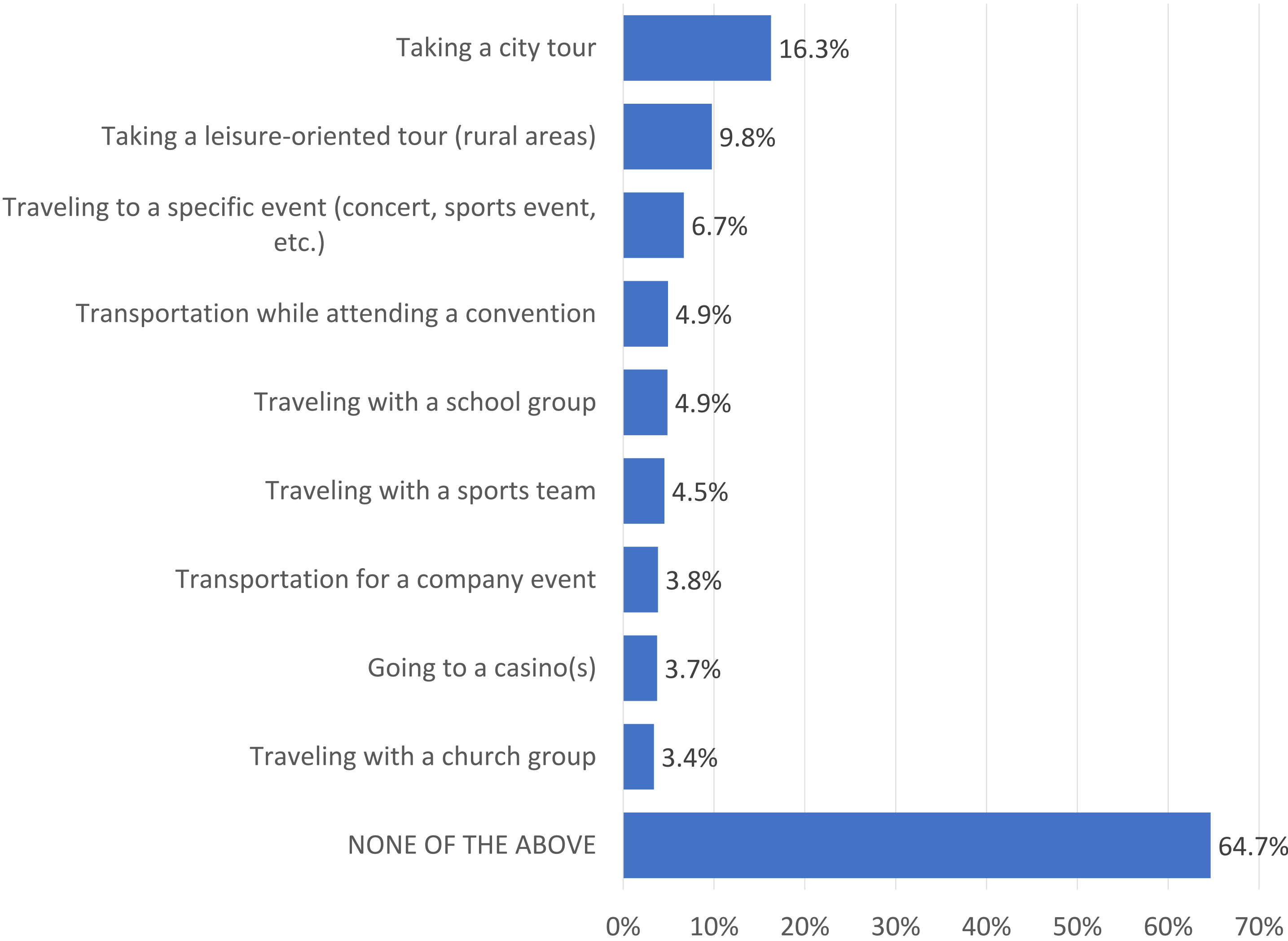
A photograph of the interior of a tour bus. In the foreground, a man in a blue t-shirt is looking out the window to the left, and a woman in a white shirt is pointing her finger towards the same direction. They are both smiling. In the background, other passengers are visible, including a man in a light blue shirt. The bus has blue seats and large windows showing a landscape with green hills and a body of water.

**How are travelers feeling about
tour bus experiences?**

Use of Tour Buses

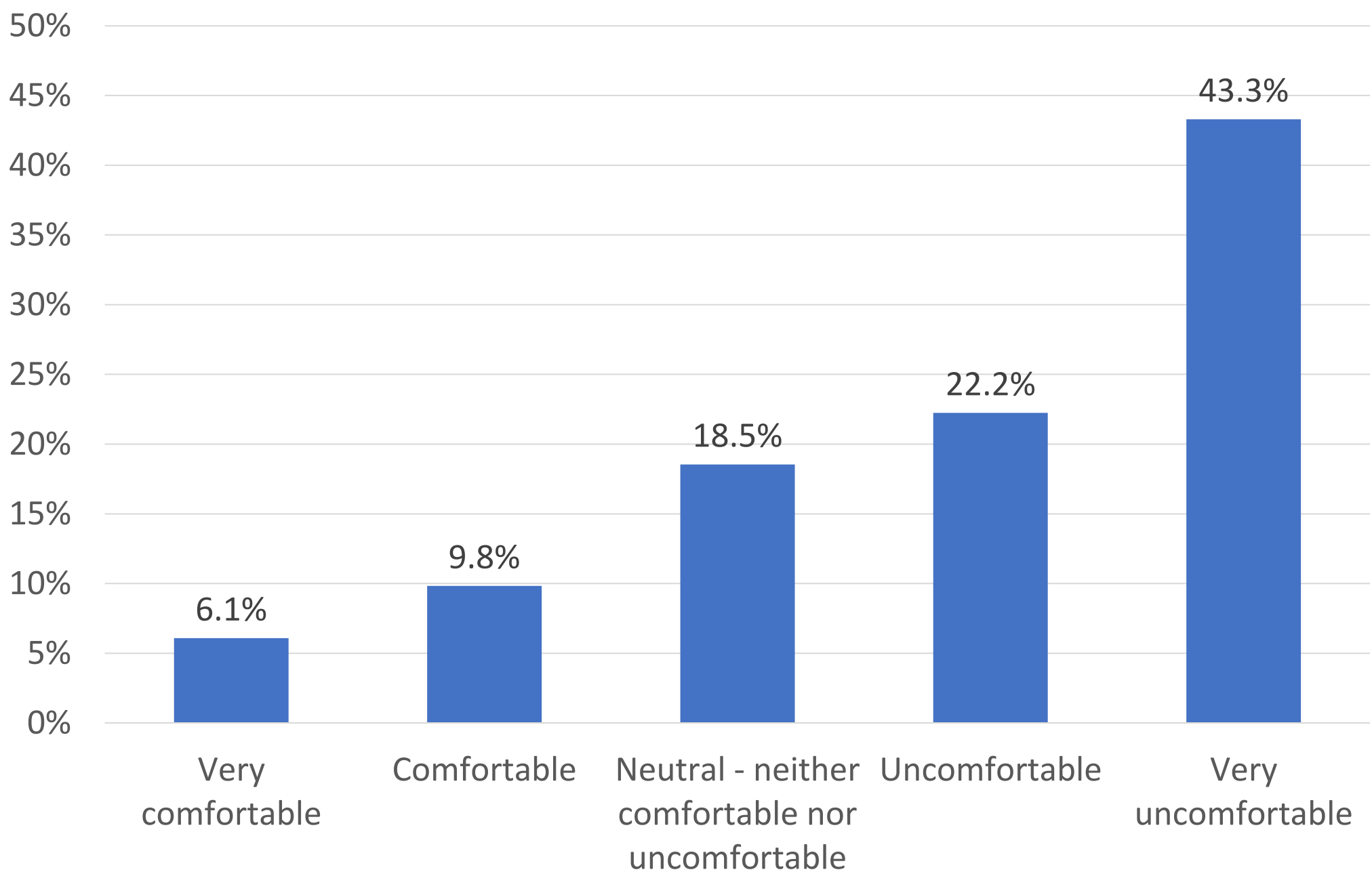
Question: In the PAST TWO (2) YEARS, for which of the following reasons have you traveled on a motor coach or tour bus?

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

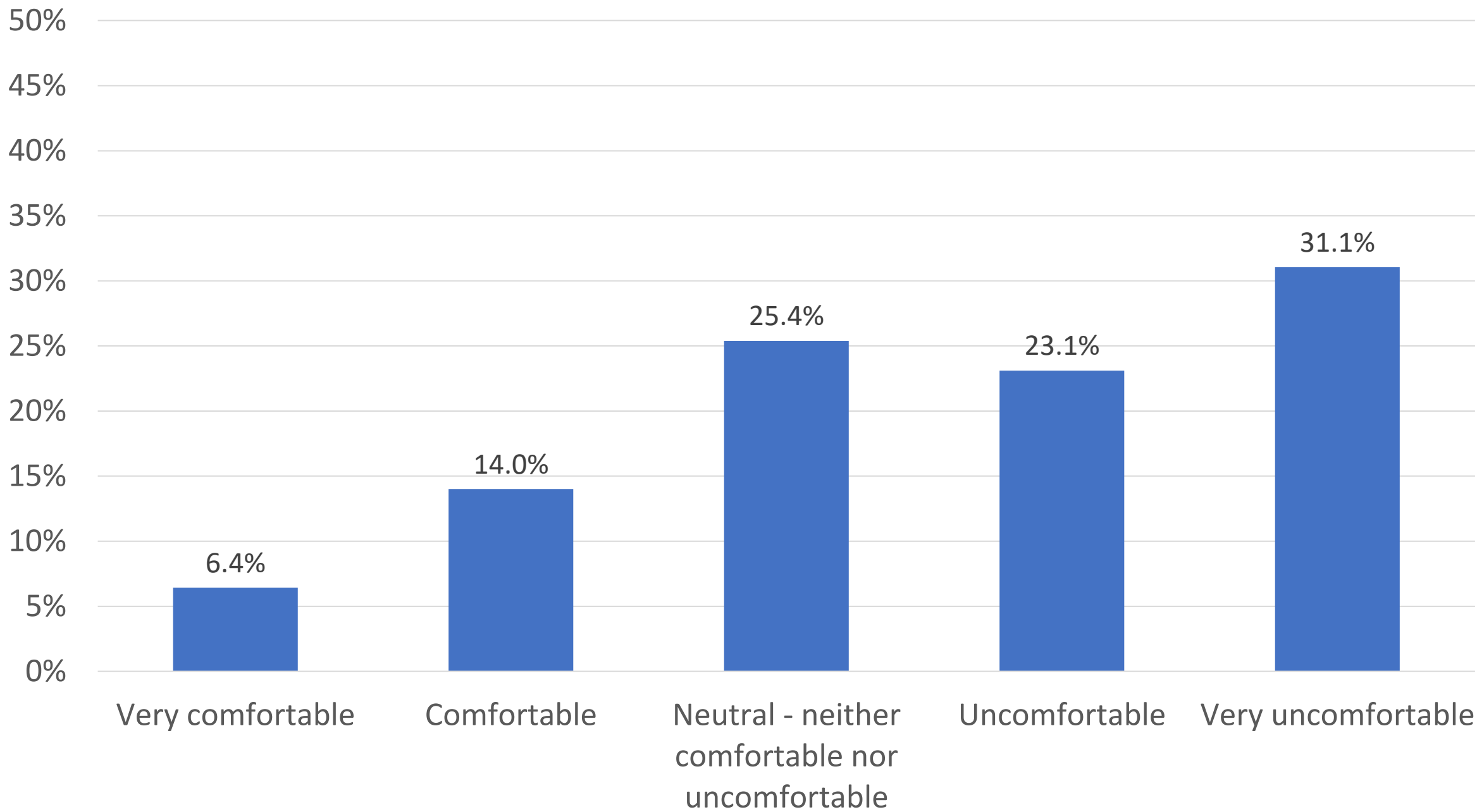


Personal Comfort Taking Bus Tours

Question: How comfortable are you with the idea of taking a bus tour sometime later this summer?

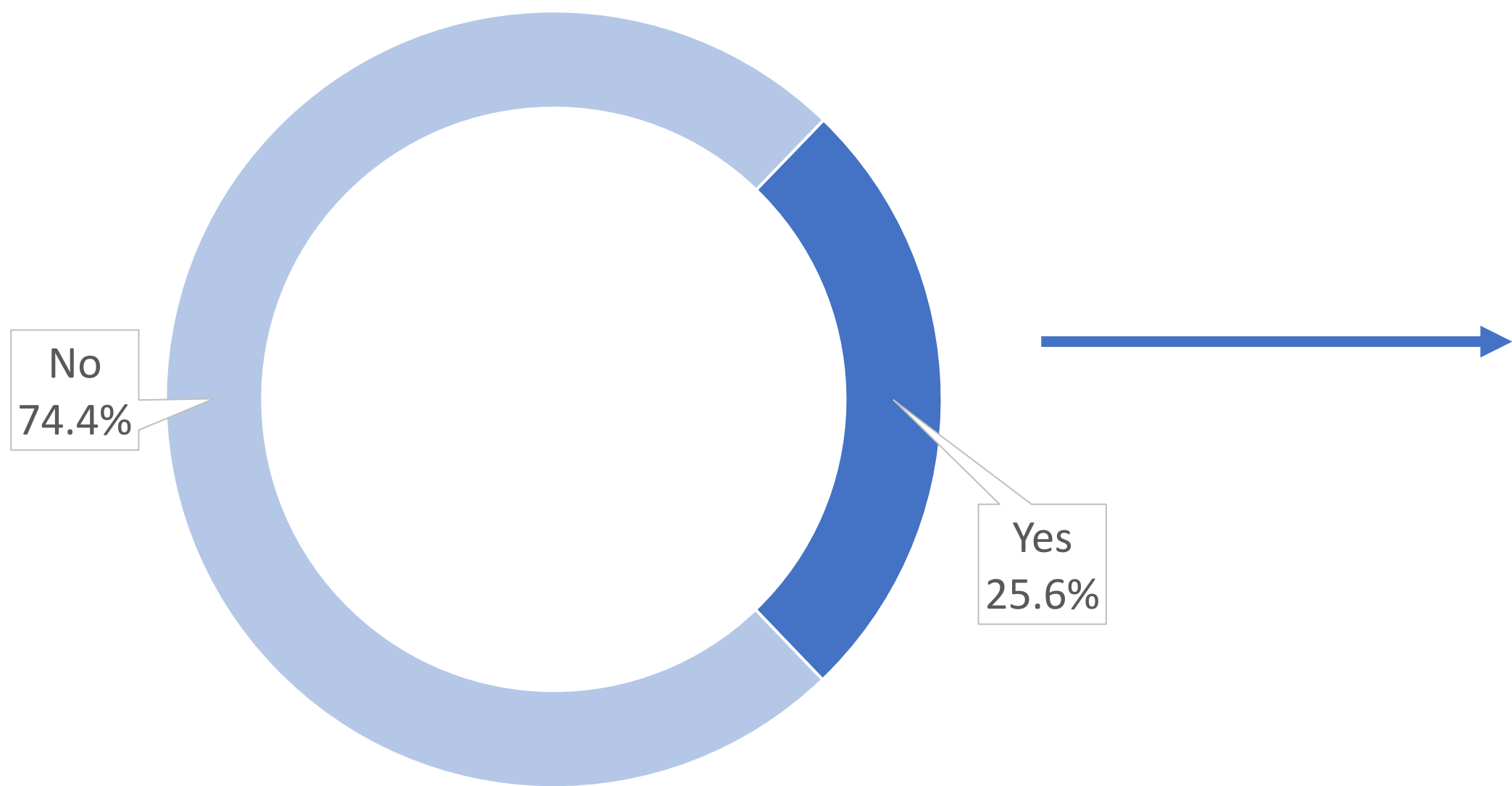


Question: How comfortable would you be with the idea of taking a bus tour with a group of people you know some time later this summer?

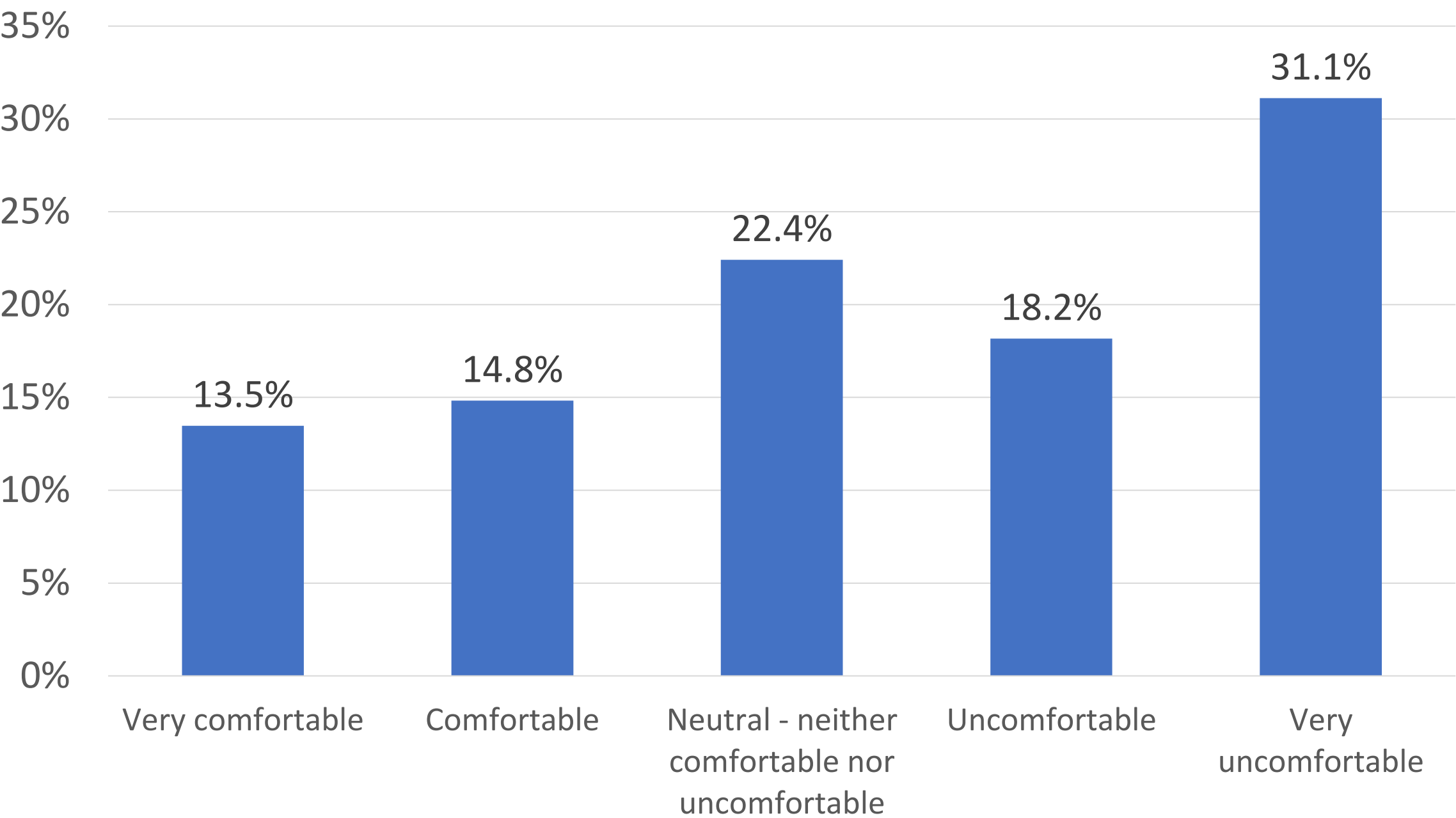


Comfort with Sending Children on Bus Excursions

Question: Do you have any school-aged children currently under your care?



Question: How comfortable would you feel sending your school-aged children on a bus tour? (Select one)





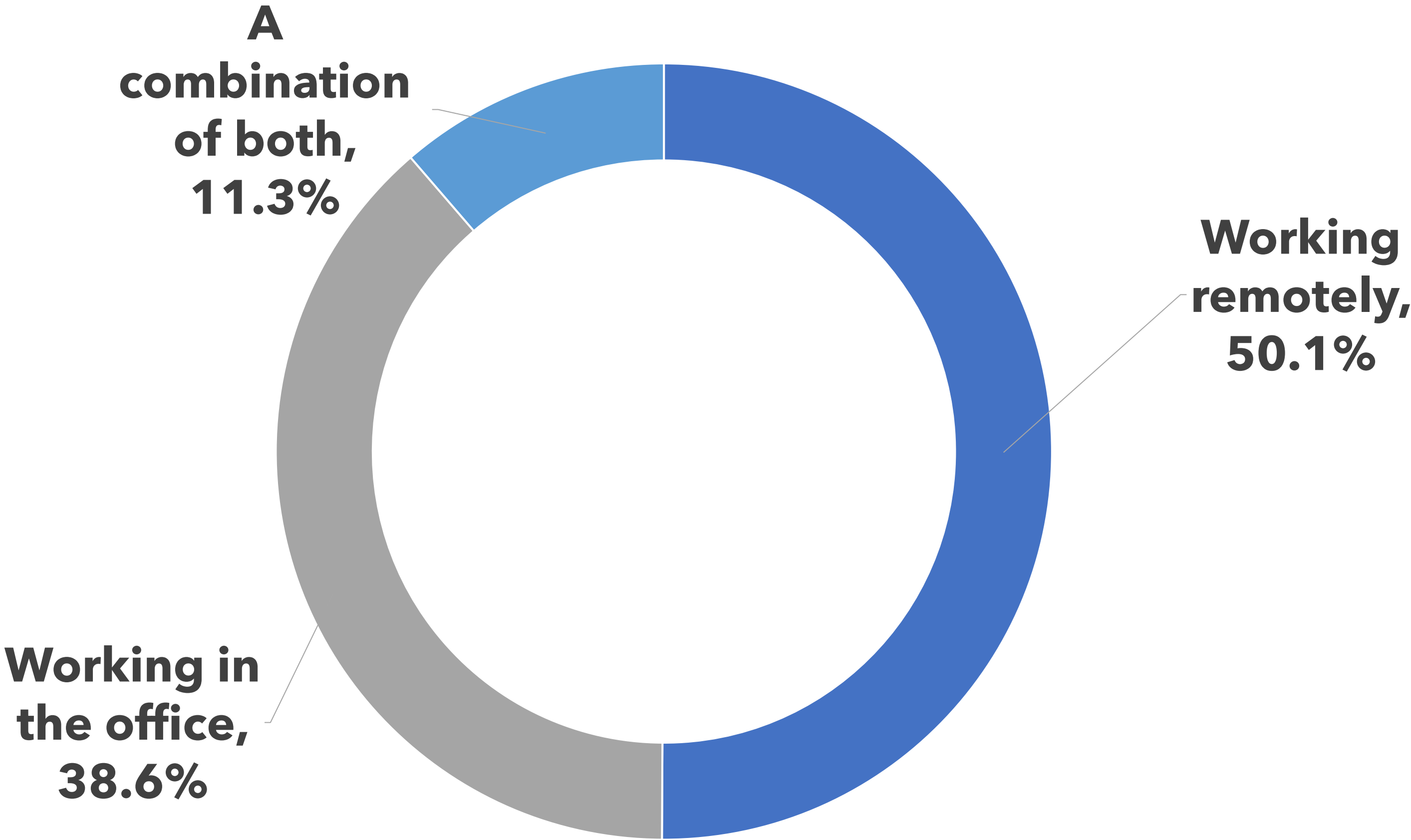
KEY TAKEAWAYS

- **Travel by tour bus will likely see significant challenges in the near-term due to safety perceptions and concerns surrounding coronavirus**

A modern, open-plan office with large windows and wooden floors. Several people are working: some are seated at desks with computers, while others are standing and talking. The office has a casual, collaborative feel. The text "Feelings About Work" is overlaid in the center in a large, white, sans-serif font.

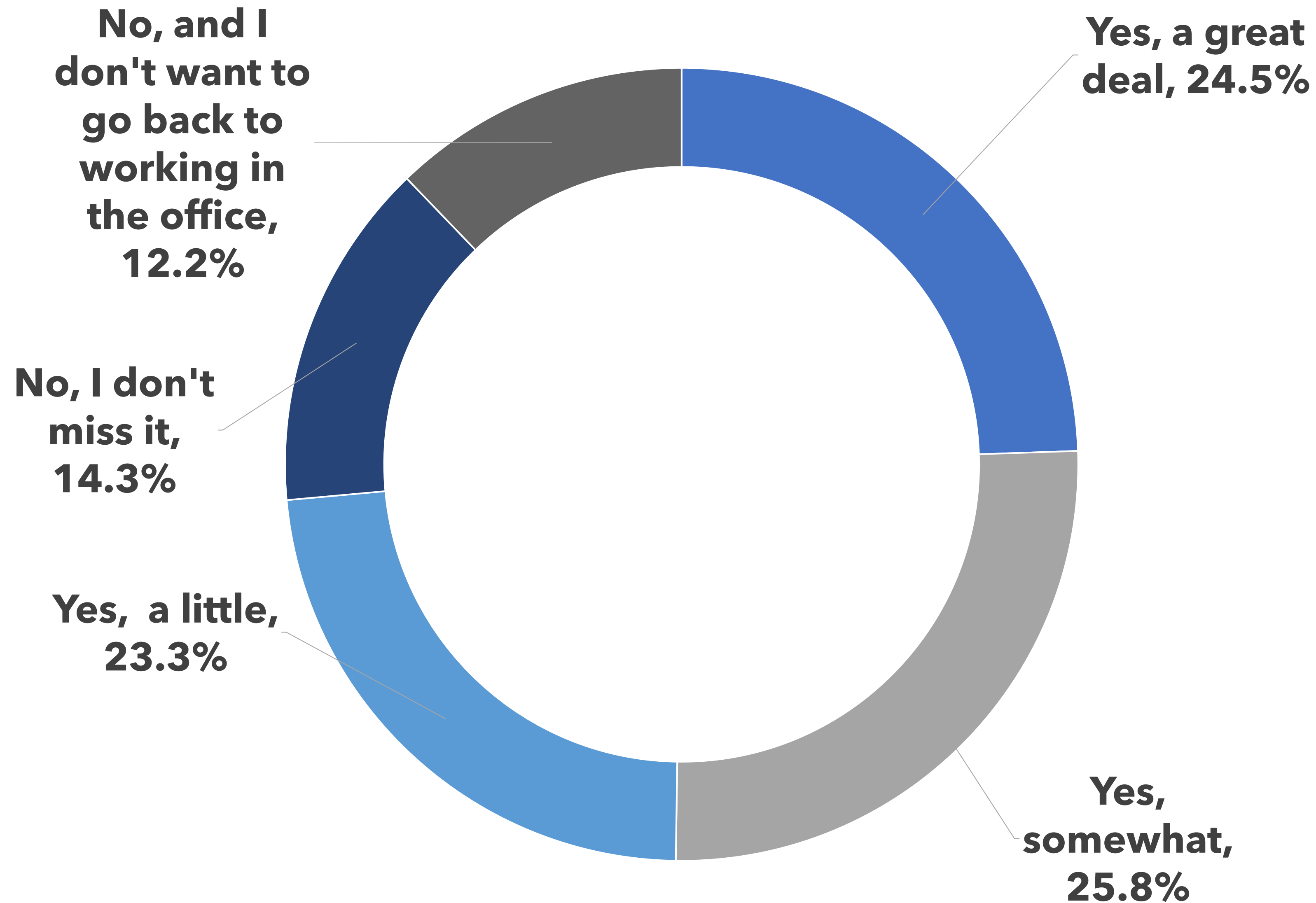
Feelings About Work

How We Are Currently Working (office workers)



Question: Are you currently going into the office to work, or are you working off-site or remotely? *Base: Employed respondents who previously worked in an office 689 completed surveys. Data collected June 12-14, 2020)*

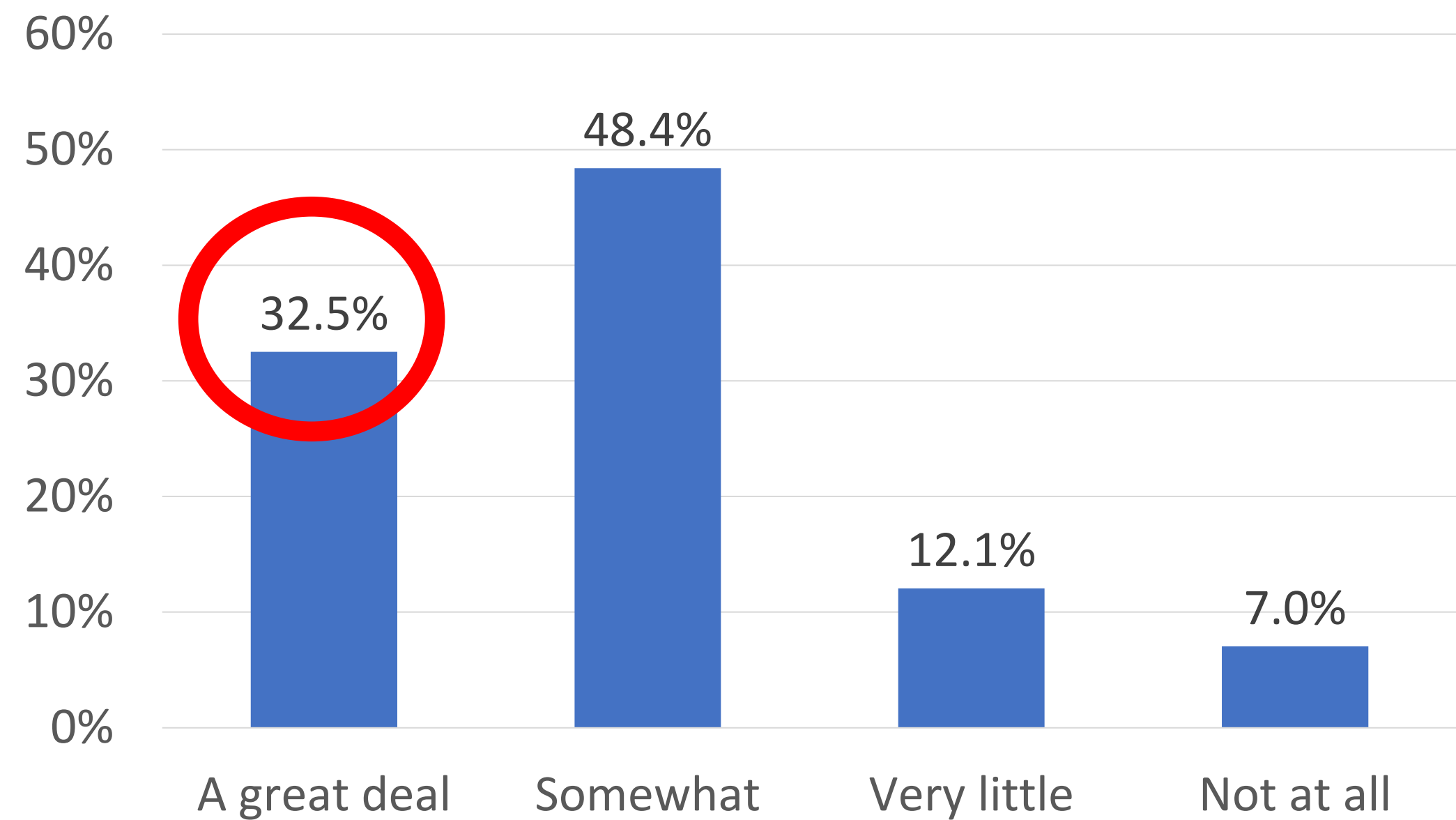
Do We Miss the Office? (office workers)



Question: Do you miss going into the office to work?
Base: Employed respondents who previously worked in an office 689 completed surveys. Data collected June 12-14, 2020)

Trust at Work

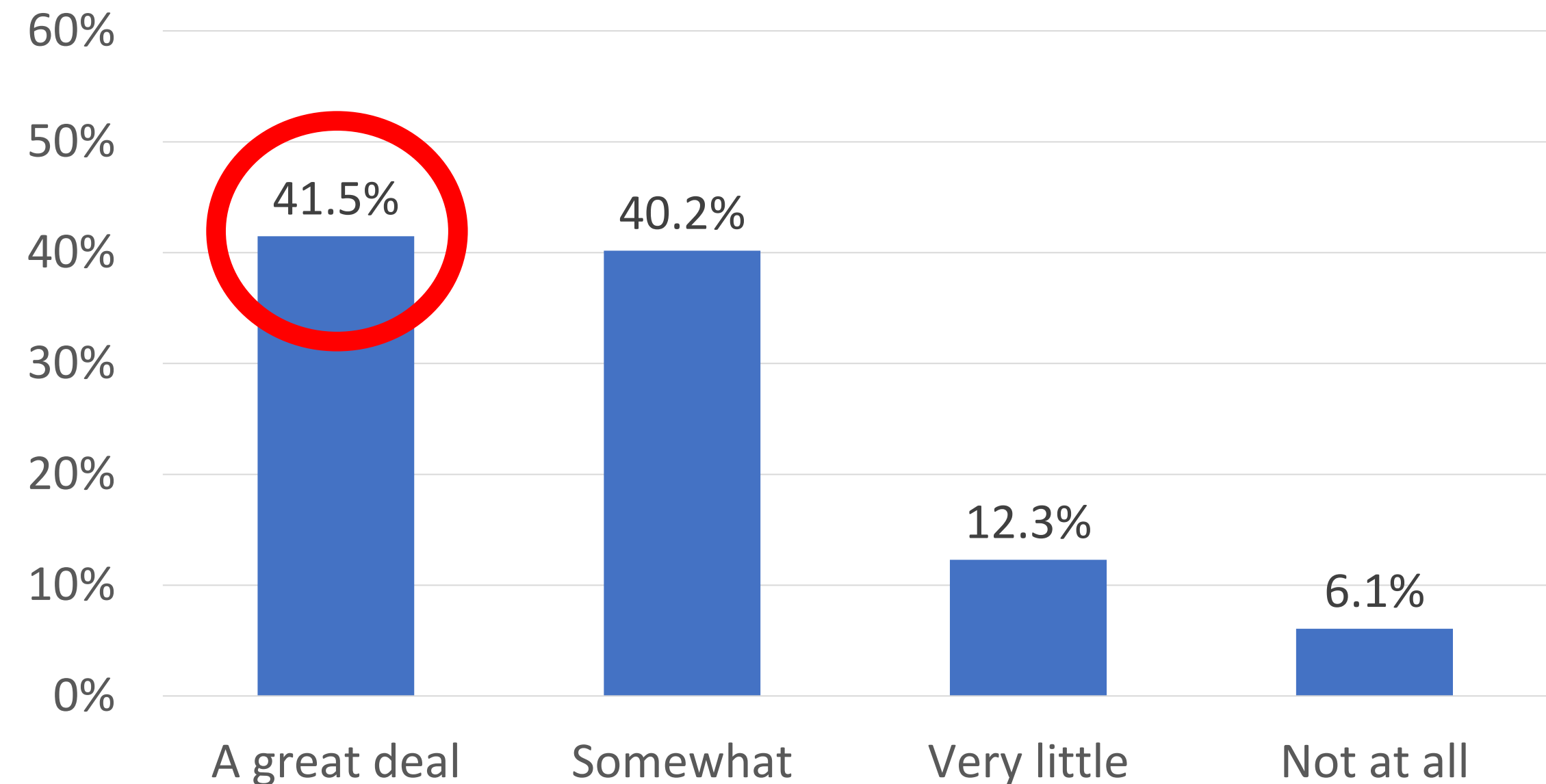
Co-workers



Question: Let's talk now about your work and the COVID-19 virus. In general, how much do you trust YOUR CO-WORKERS to behave in a way that will protect your health while at work? (Select one)

I trust my co-workers _____

Employer



Question: In general, how much do you trust YOUR EMPLOYER to look out for your health while at work?

I trust my employer _____

KEY TAKEAWAYS

- **The most public facing office workers tend to miss the office environment. Younger office workers are relatively less likely to miss the office**
- **Americans appear to have stronger trust in their employers than their coworkers to protect their health**

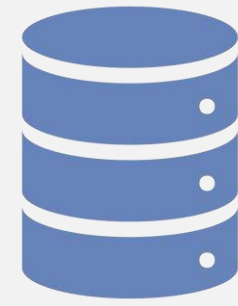


Coronavirus Travel Sentiment Index

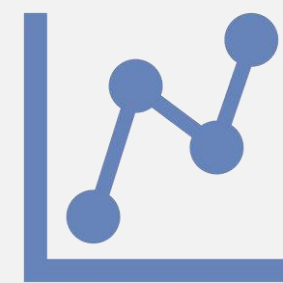
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 14th

What is a Predictive Index?



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



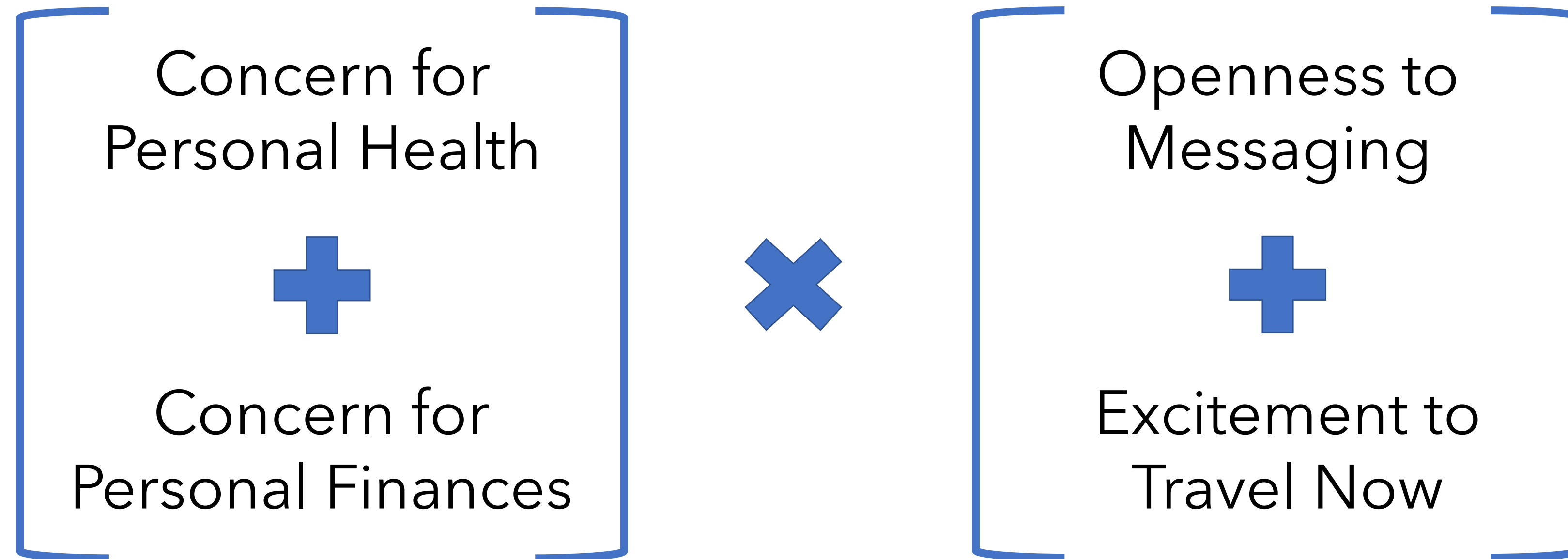
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

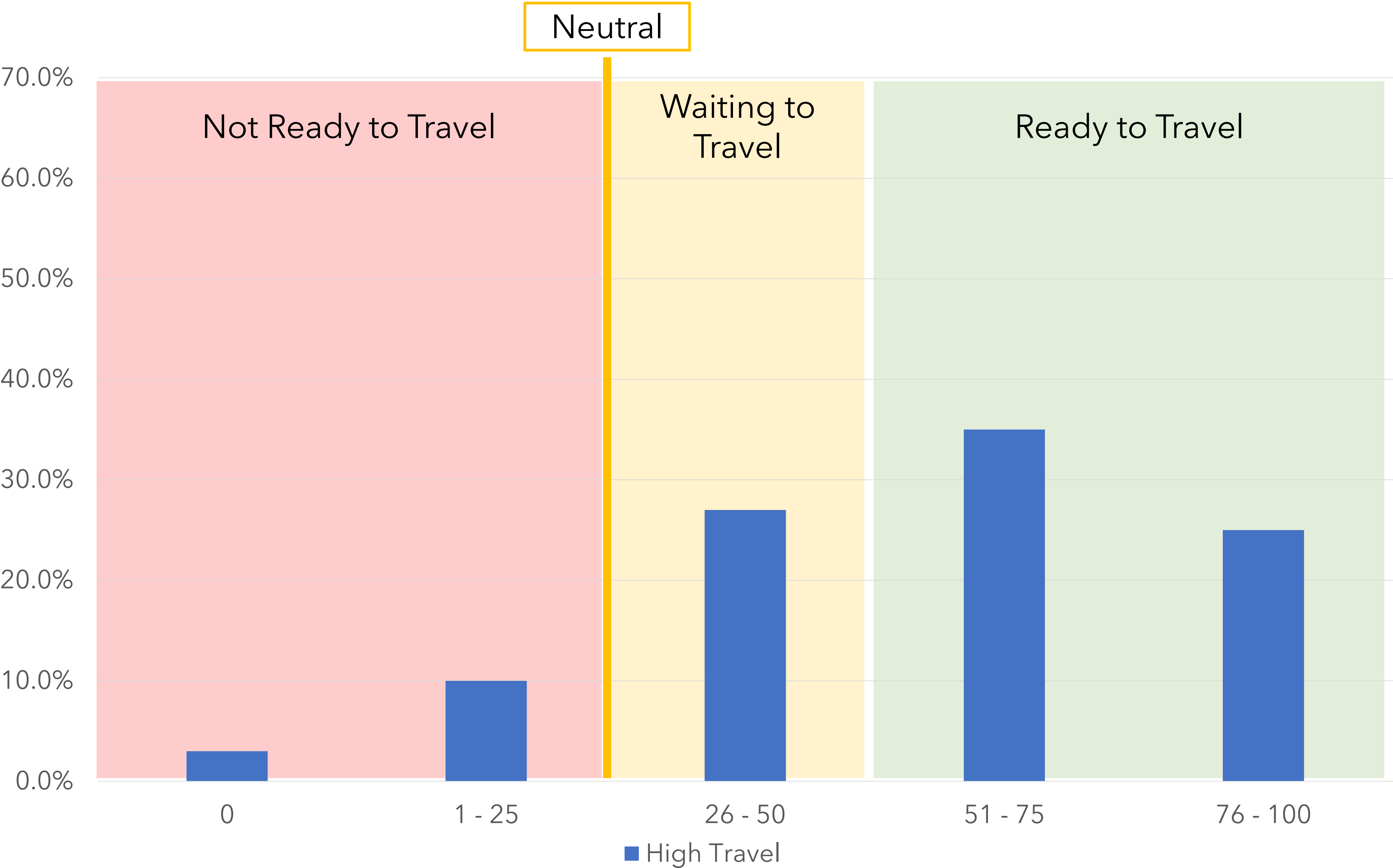
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



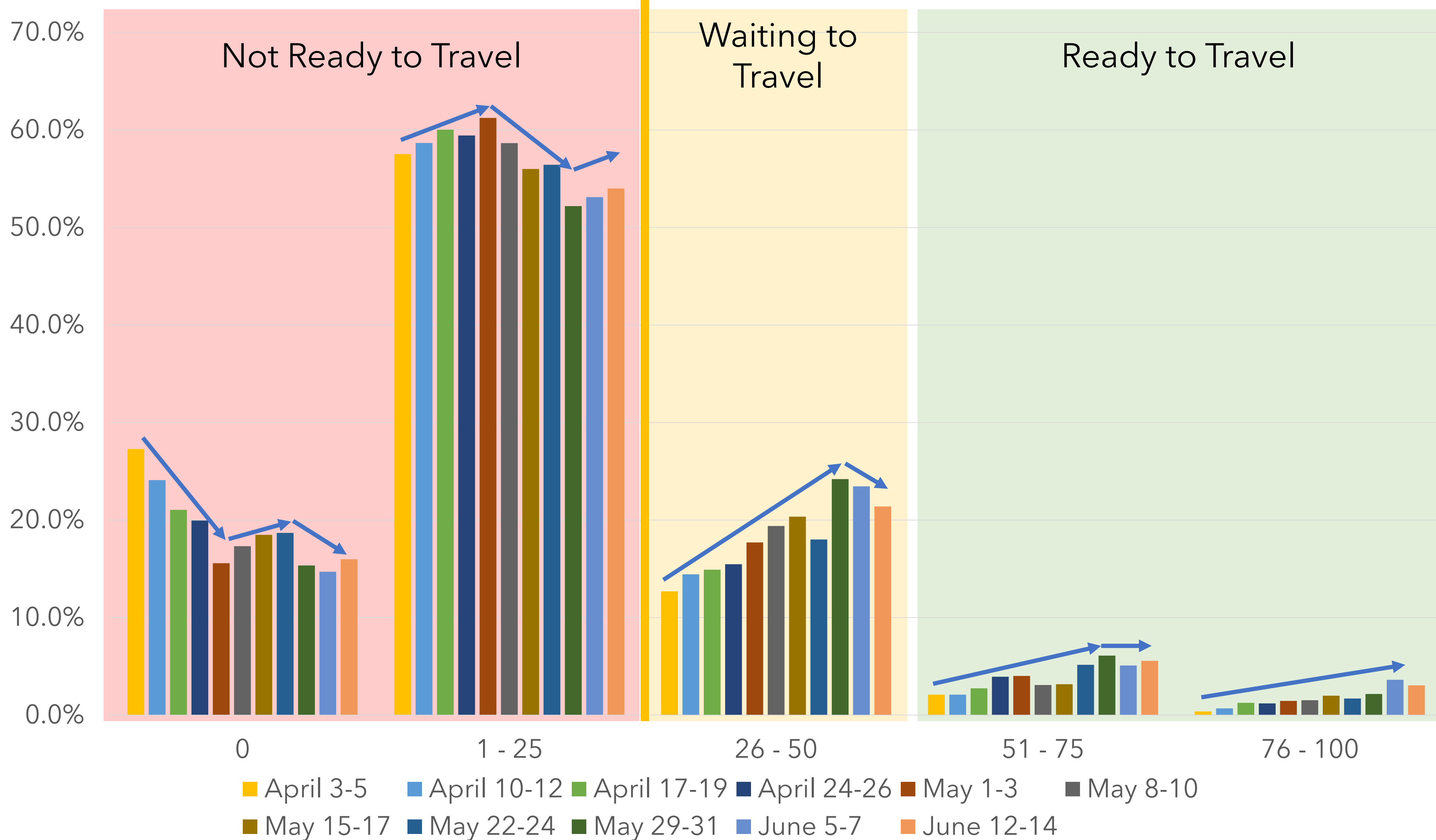
*Normalized to a 100pt scale

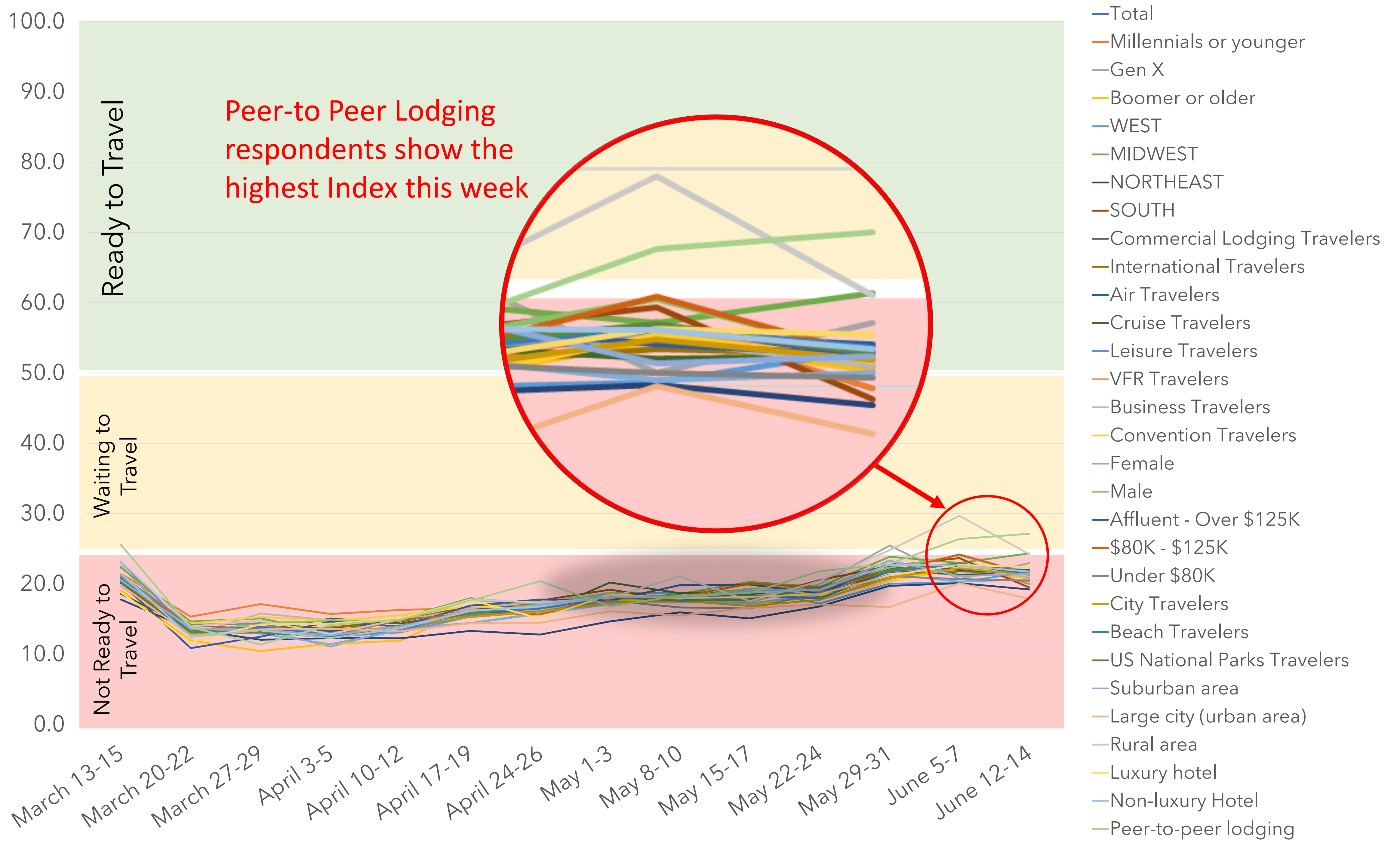
Healthy Travel Outlook



Travel Outlook

Neutral

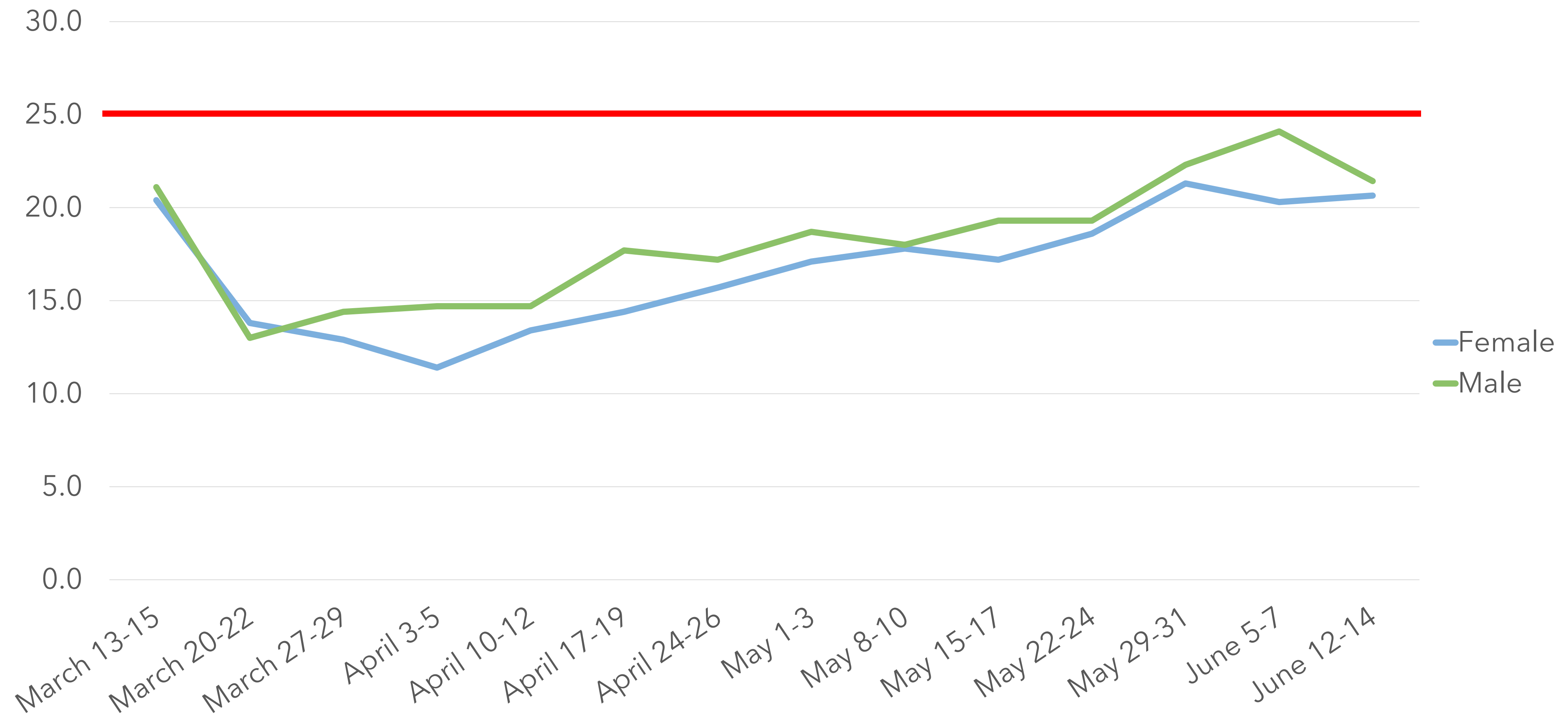




Gender

Points of Interest:

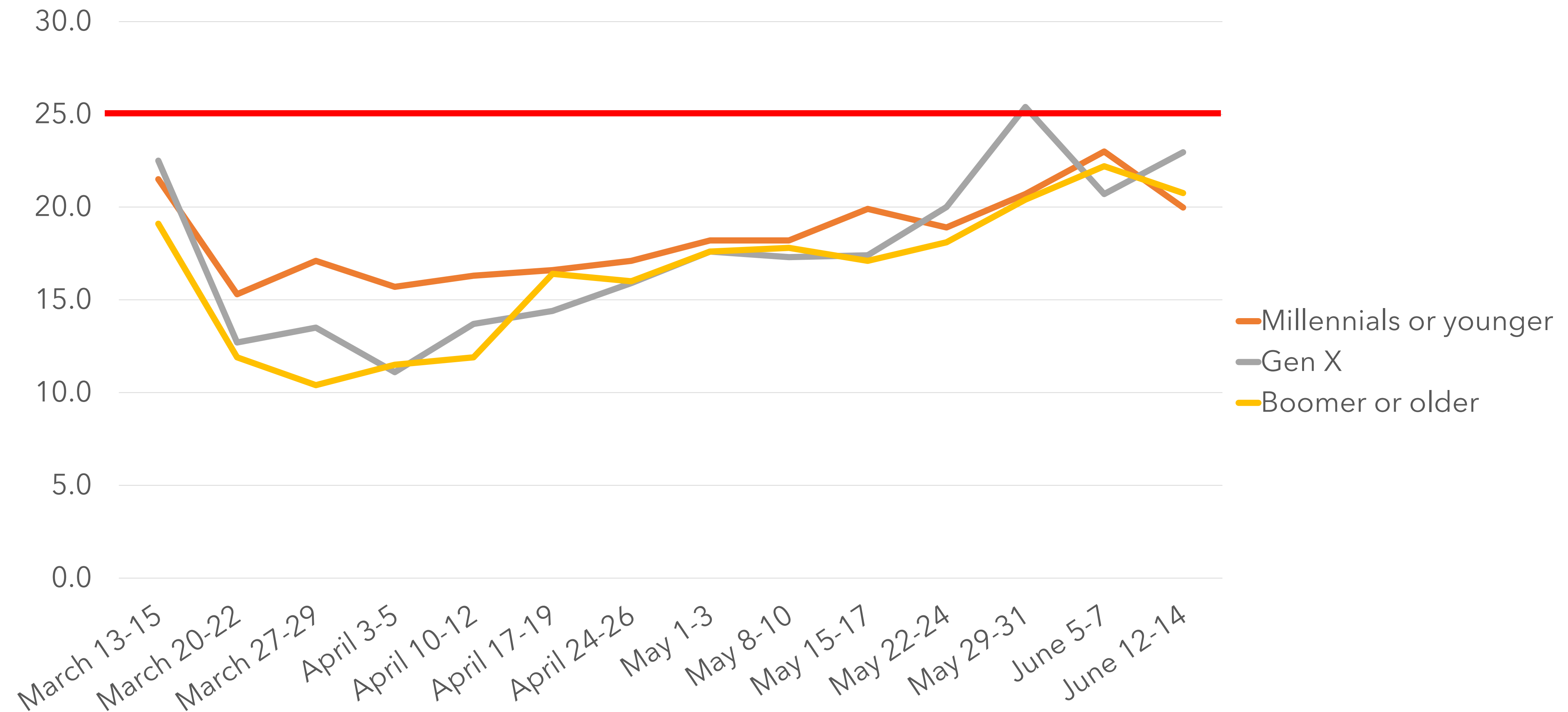
- Safety concerns decreased among Women this week and increased for Men.
- This week more Men reported they “have no plans to travel in 2020” (27.8% up from 21.1% two weeks ago), while this stat for Women remains largely unchanged week over week.



Generation

Points of Interest:

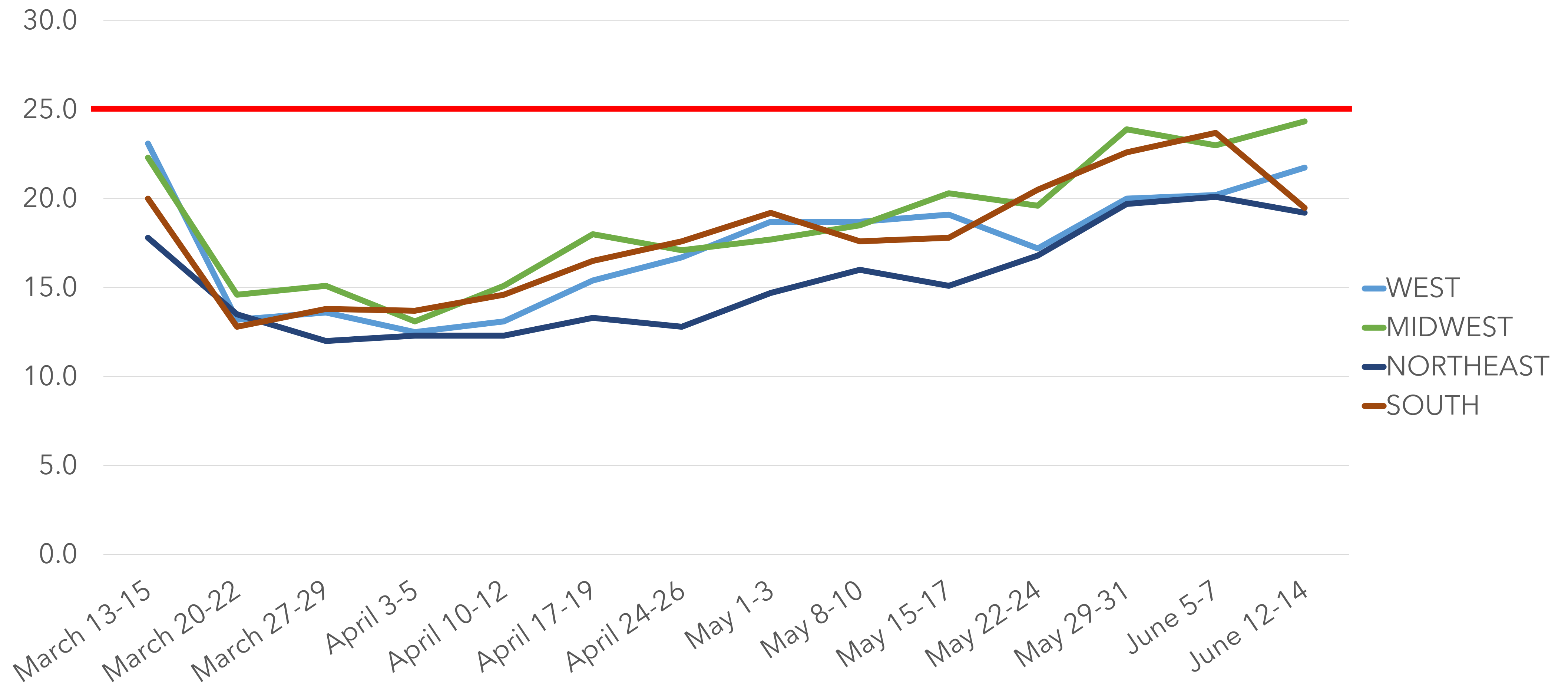
- Gen X was the only generation to show decreases in both safety and financial concerns this week, while Millennials and Boomers showed slight increases in both concern metrics.
- Gen X also showed a slight rise in openness to travel messaging while both Millennials and Boomers saw slight drops.



US Region

Points of Interest:

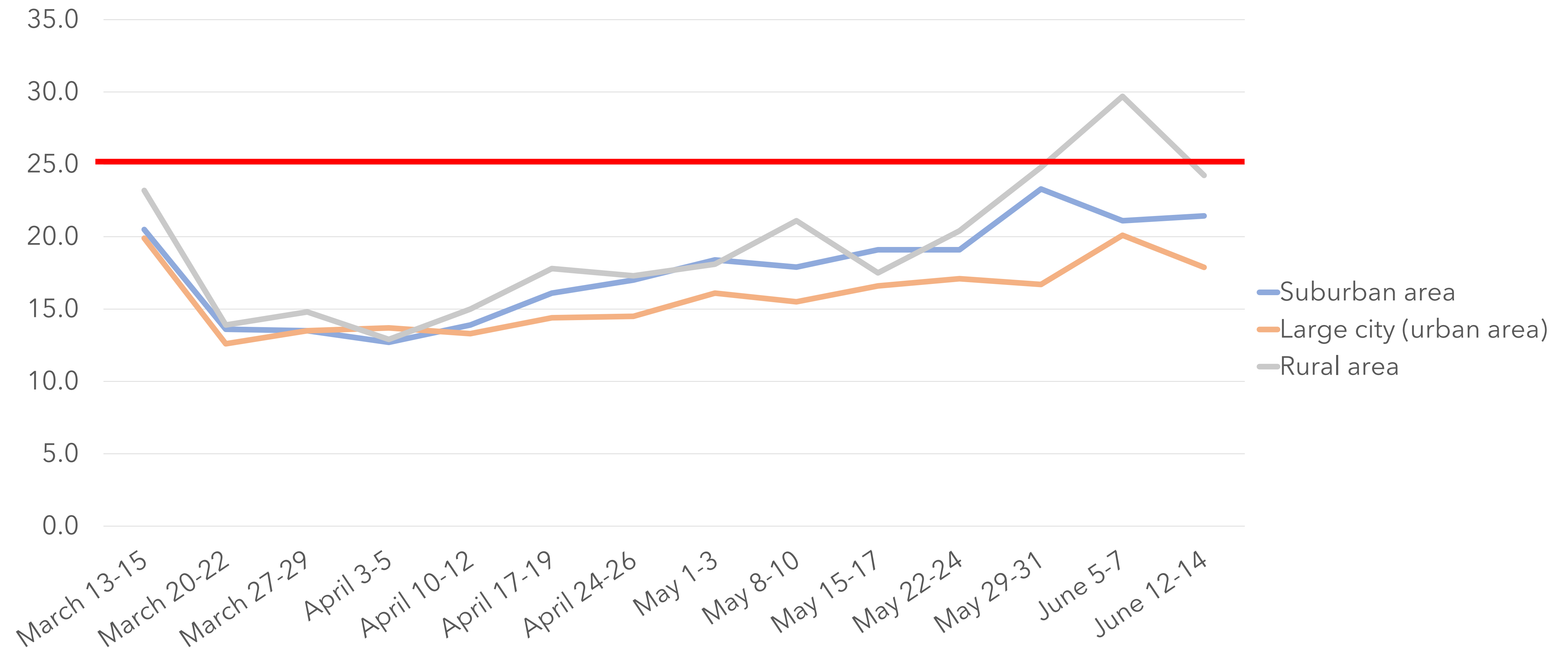
- Both safety and financial concerns decreased in the West and Midwest regions this week and increased in the Northeast and South.
- The South was the only US region this week to show a decrease in excitement for travel this week.



Type Of Residence

Points of Interest Impacting Index Scores:

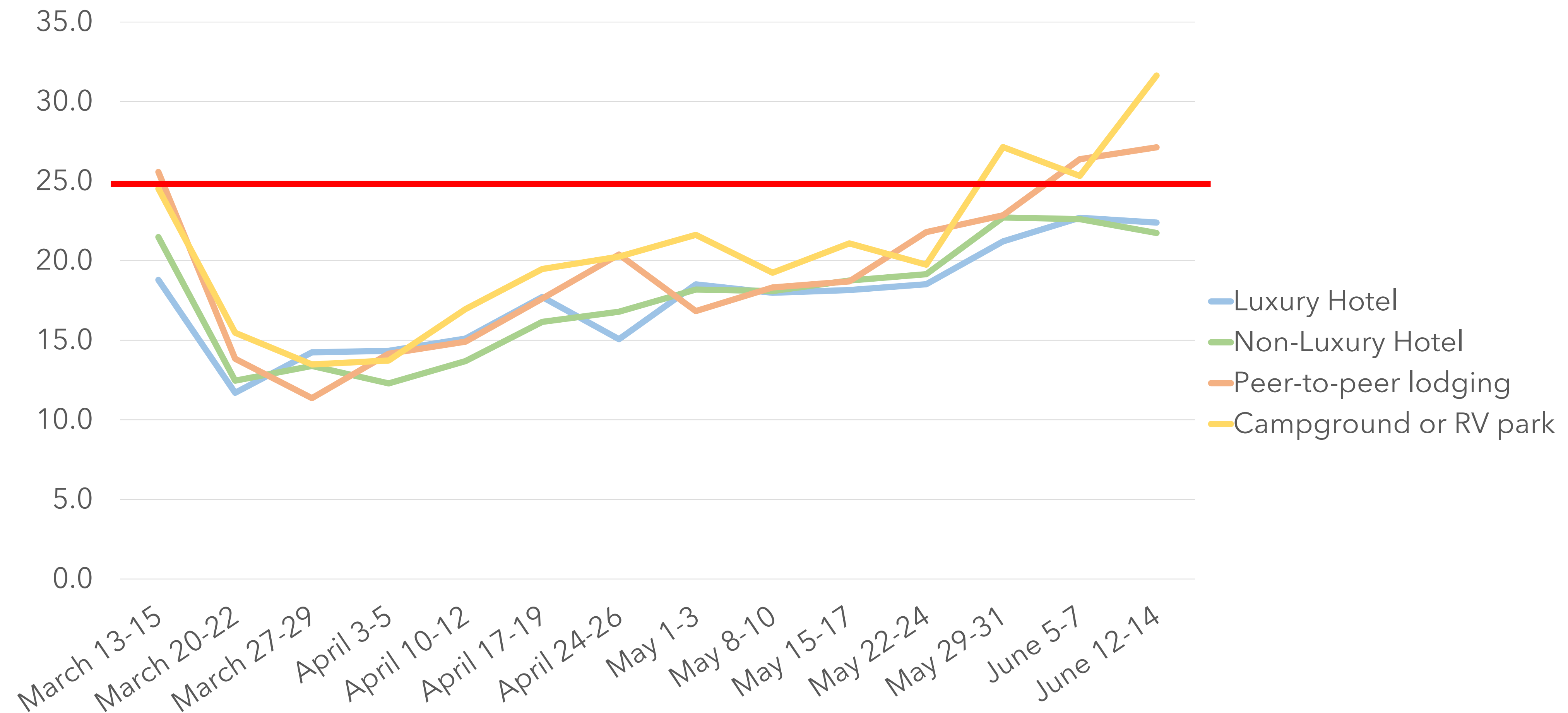
- The consistent growth in optimism among Rural respondents in the last four weeks has shown some hesitation this week, but they are still showing higher average index scores than their Urban and Suburban counterparts.
- Safety concerns decreased modestly for Suburban respondents this week while showing slight increases for Urban and Rural respondents.



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer lodging travelers are the only segment with an average index score above 25 this week.
- Peer-to-peer lodging travelers reported the biggest increase in excitement for travel while Luxury hotel travelers showed the biggest decreases in both safety and financial concerns this week.



Who Is Most Ready to Travel?





THOSE WHO ARE READY TO TRAVEL:

- **Skew Caucasian suburbanites**
- **Expect the coronavirus situation in the U.S. to get better in the next month**
- **Feel comfortable going out into and experiencing their community**
- **Likelier to feel the federal government has done a good job of managing efforts and communicating with the public**
- **Feel the hotel and airline industries have well-communicated measures they have taken to keep travelers safe**
- **They personally feel that they are well-informed about Coronavirus-related travel risks and are confident that they could travel safely in the current environment**



THOSE WHO ARE READY TO TRAVEL:

- **At this moment, nearly all would feel safe taking a road trip and visiting friends and family**
- **Expect to travel this Fall and have plans to take a leisure trip this year, with the highest percentages reporting planned trips in August and September**
- **40 percent will not avoid any of the travel activities tested in the current or post pandemic period**
- **Would be comfortable taking a bus tour this summer**
- **Say that discounts and deals make them more interested in traveling in the next three months**

A photograph of travel gear on a beach. In the foreground, a tan leather suitcase sits on a wooden surface. A woven straw hat with a dark band is perched on top of the suitcase. A vintage-style camera with a black strap is positioned in front of the suitcase. The background shows a clear blue sky and a calm ocean, with a palm tree branch visible in the upper right corner.

KEY TAKEAWAYS

- **Nearly all traveler types tracked in this study showed a retreat in this week's index values, a moment consistent with negative issues seen this week throughout this survey**
- **The most confident among us are ready to travel**



Webinar recording available on our website:

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

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

info@destinationanalysts.com



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

Send suggestions or requests for questions to:

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