



Coronavirus Travel Sentiment Index

Presentation of Findings
Week of June 7th

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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so much to our clients and partners who have

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





Webinar recording available on our website:

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problematic statistical

report method

Survey result

select

analysis

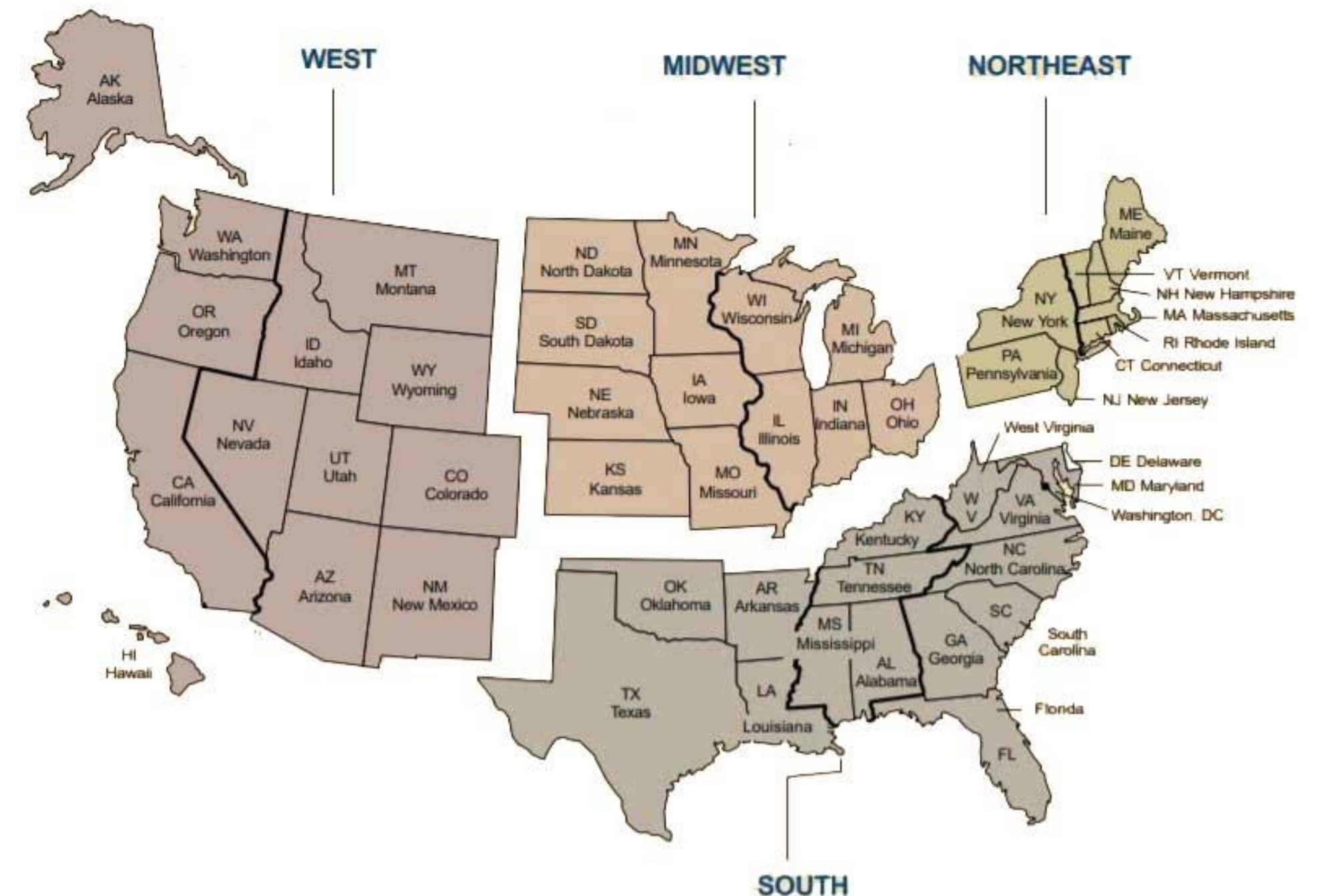
question

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 13 data (fielded June 5th-7th) 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.

A photograph of travel gear on a beach. In the foreground, a brown leather suitcase sits on a wooden surface. A woven straw hat with a black band is placed on top of the suitcase. A silver vintage camera with a black strap is positioned in front of the suitcase. The background is a blurred view of a beach, ocean, and a clear blue sky. A palm tree frond is visible in the upper right corner.

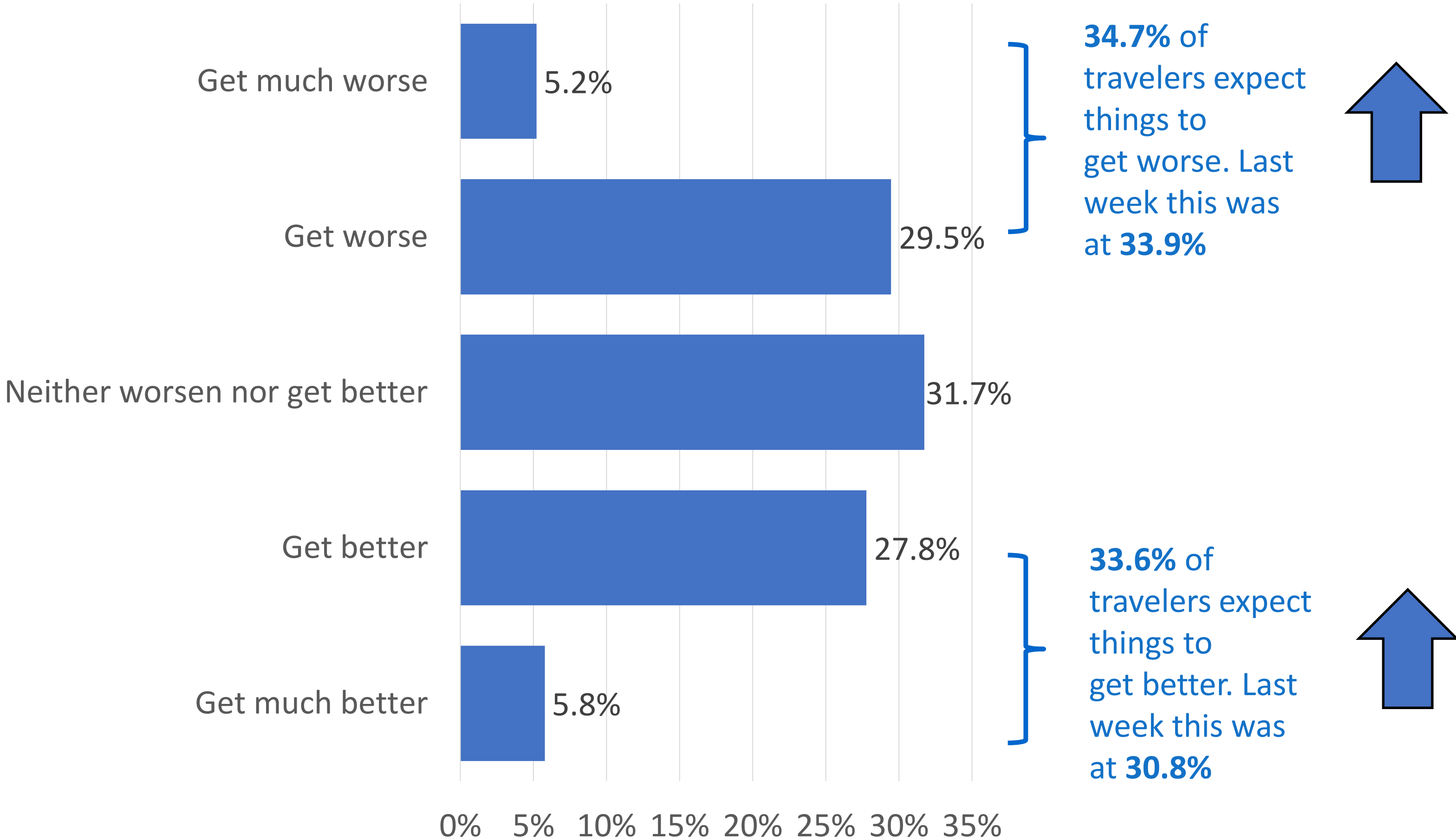
How Safe Americans Feel about Travel

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 5-7, 2020)

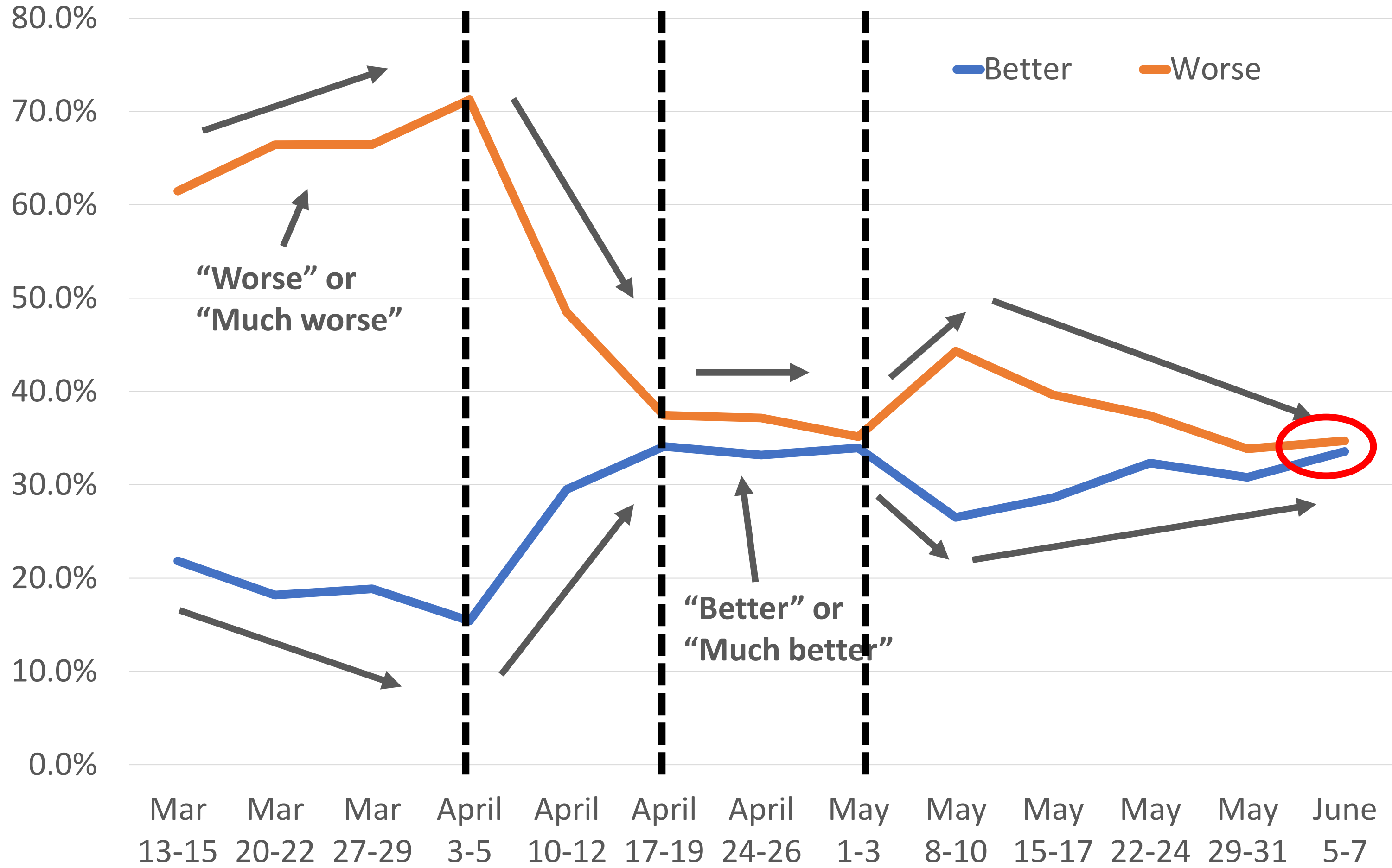


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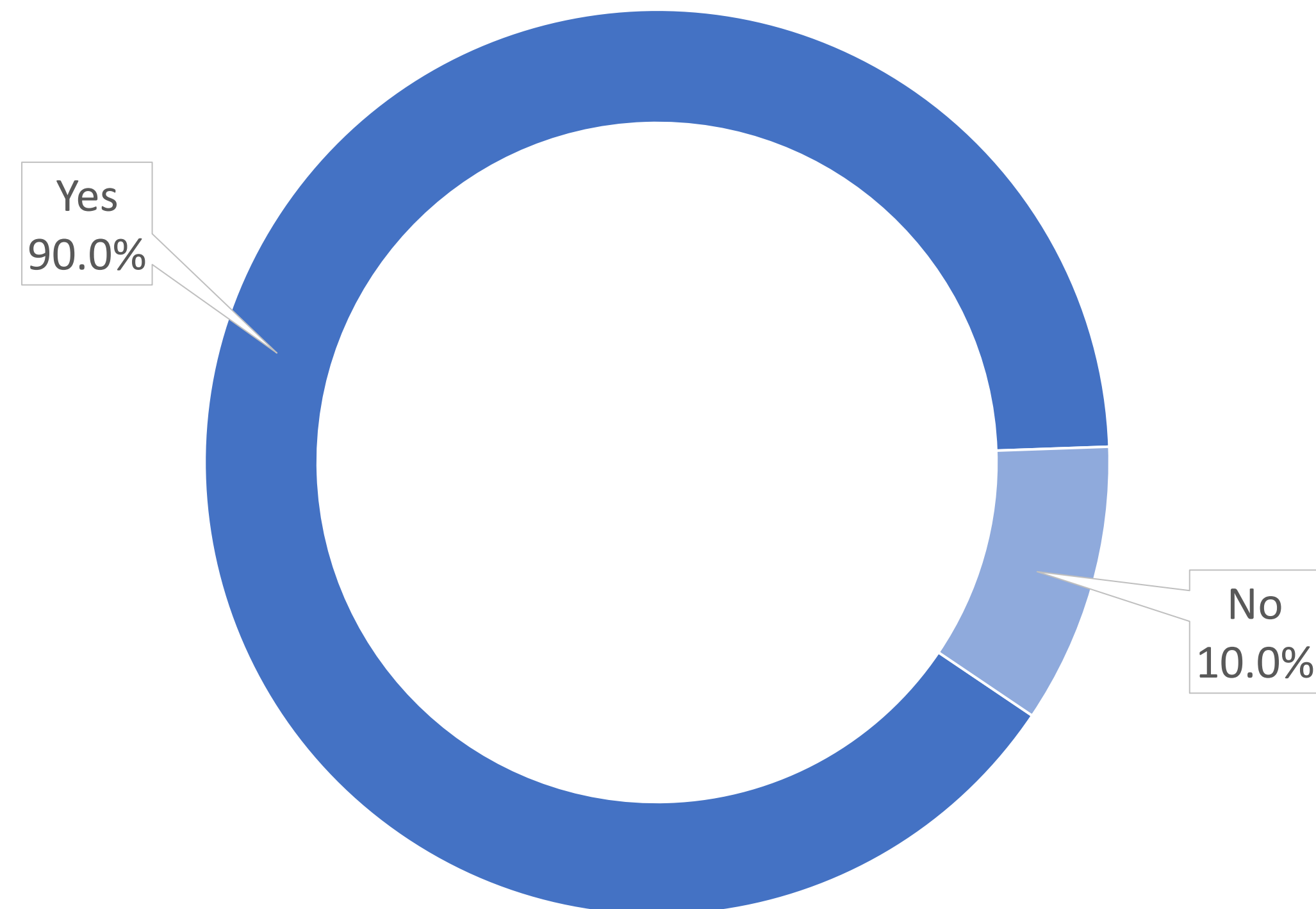
In the next month the coronavirus situation will

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 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 and June 5-7, 2020)



Expectations for the Coronavirus Outbreak

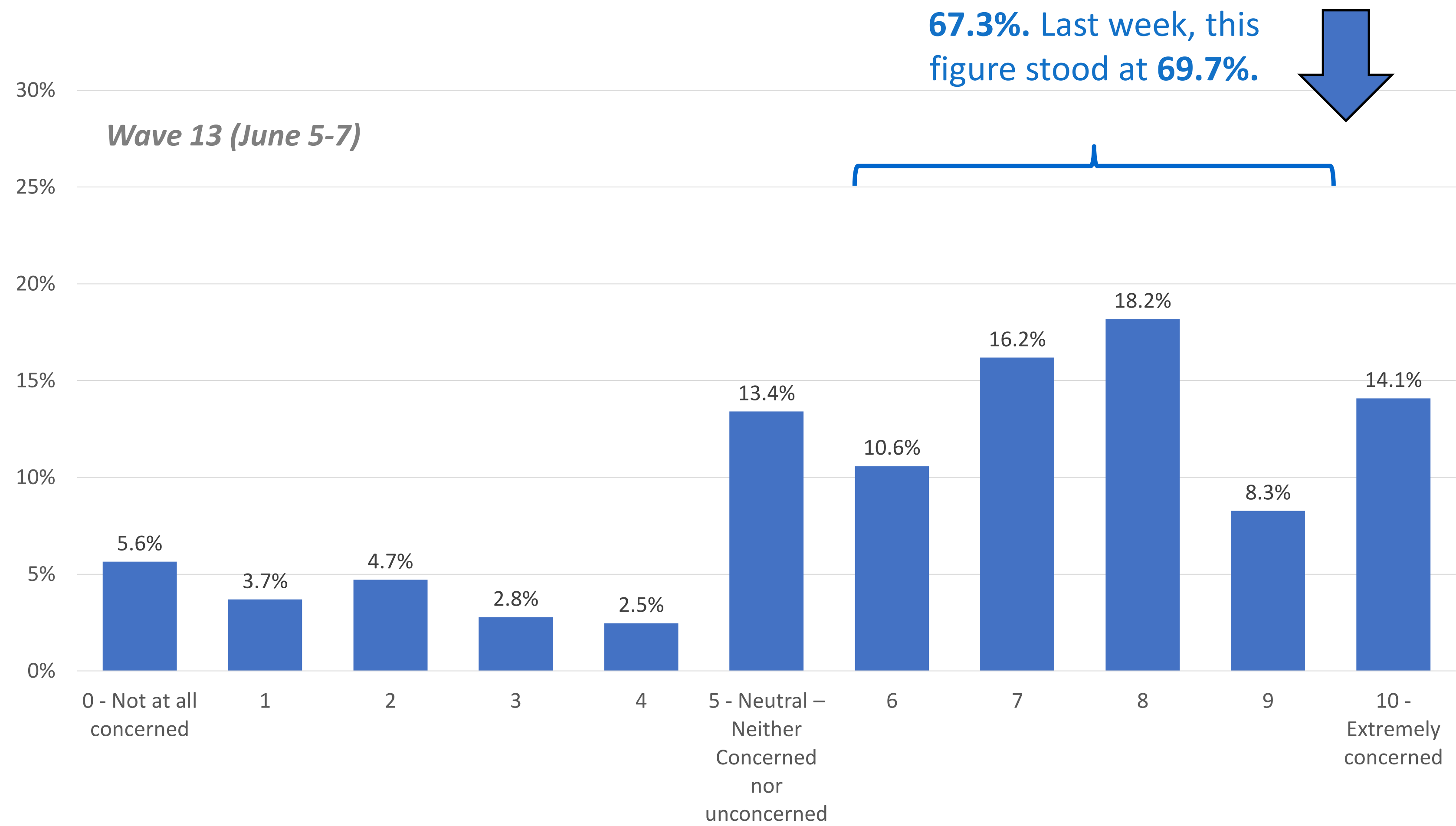
Question: Has the social unrest (protests, etc.) happening in the country right now contributed to your expectation that the Coronavirus situation will get worse in the next month?



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)

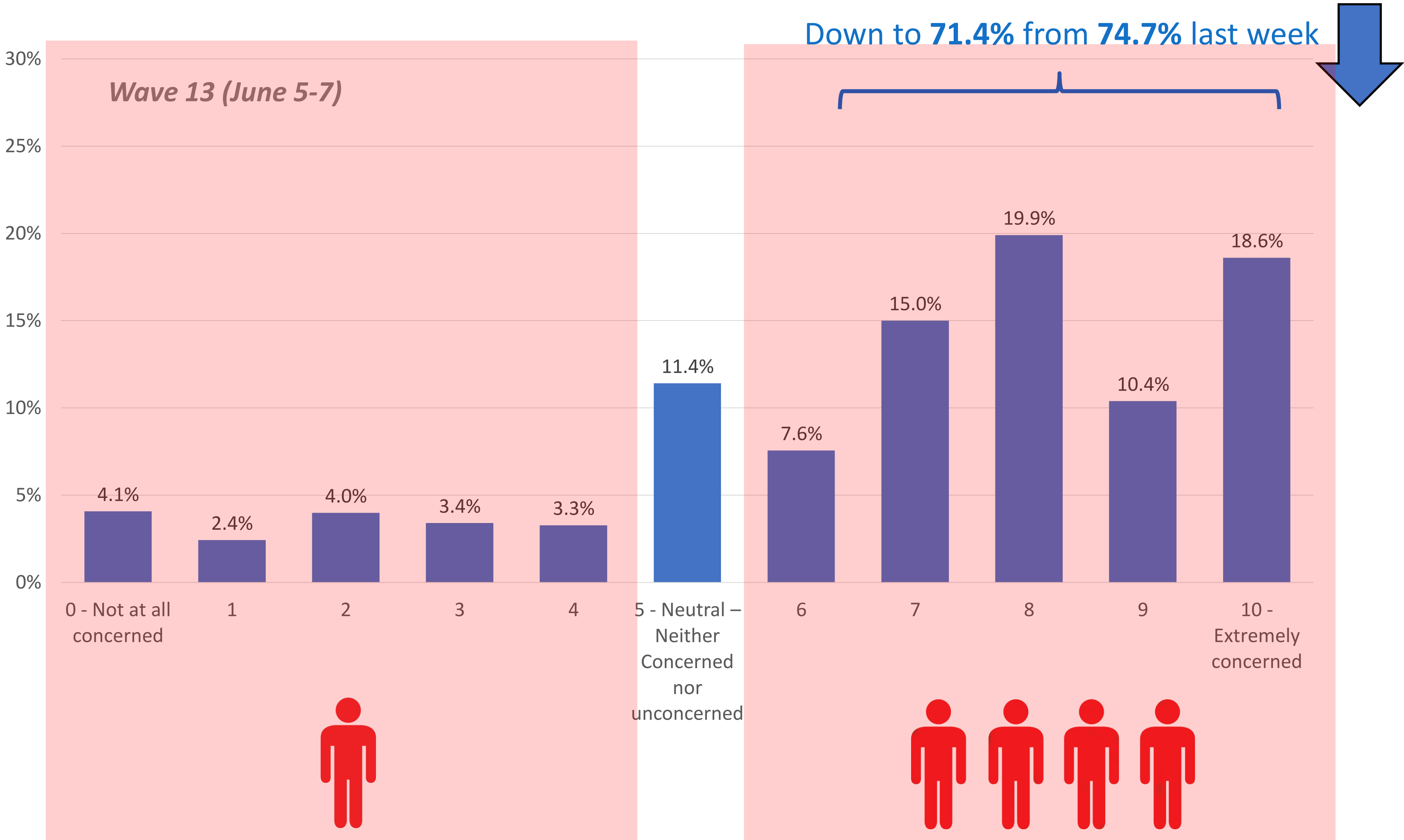
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



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)

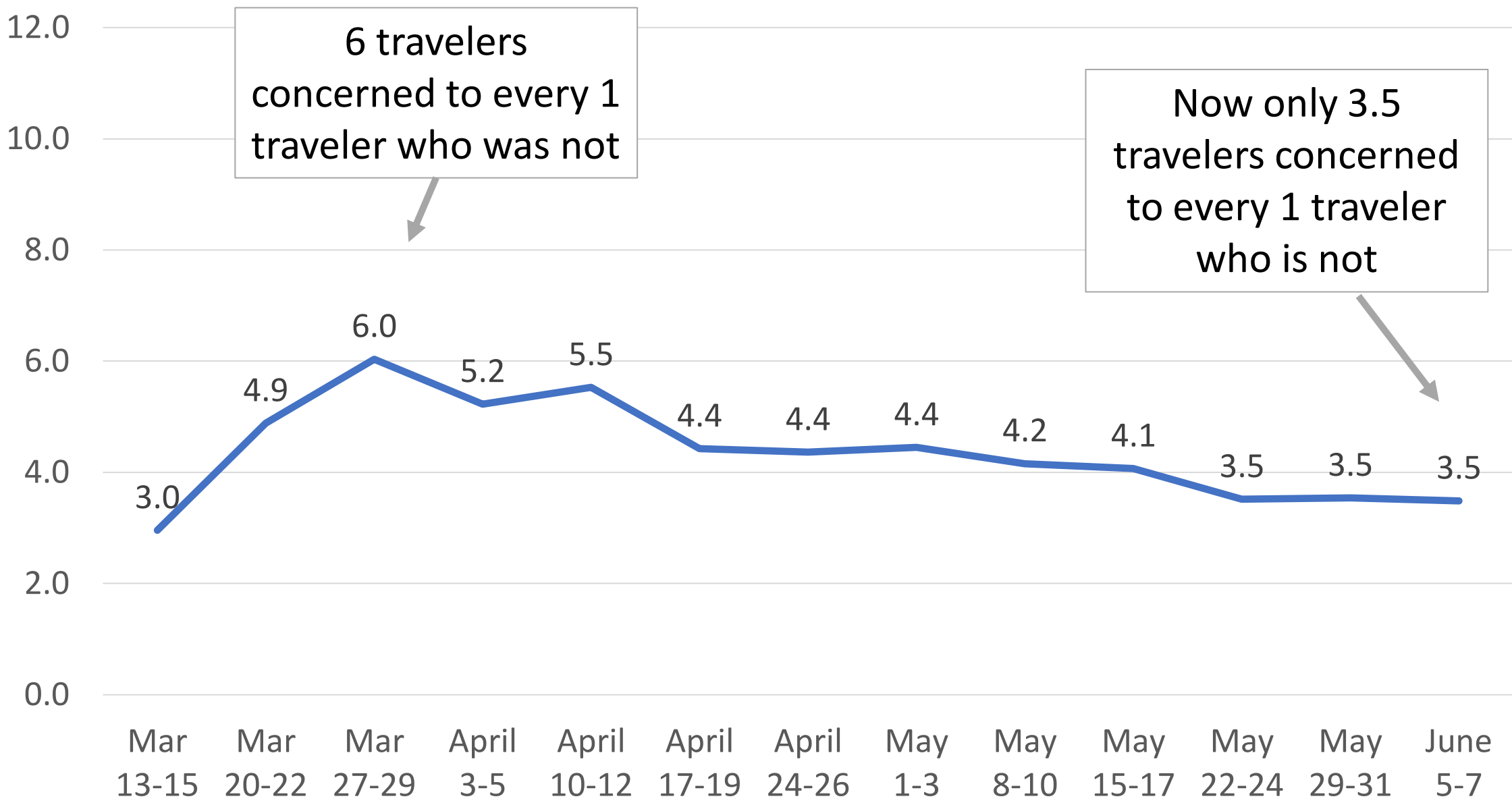
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Ratio of Concerned to Unconcerned Travelers: Safety

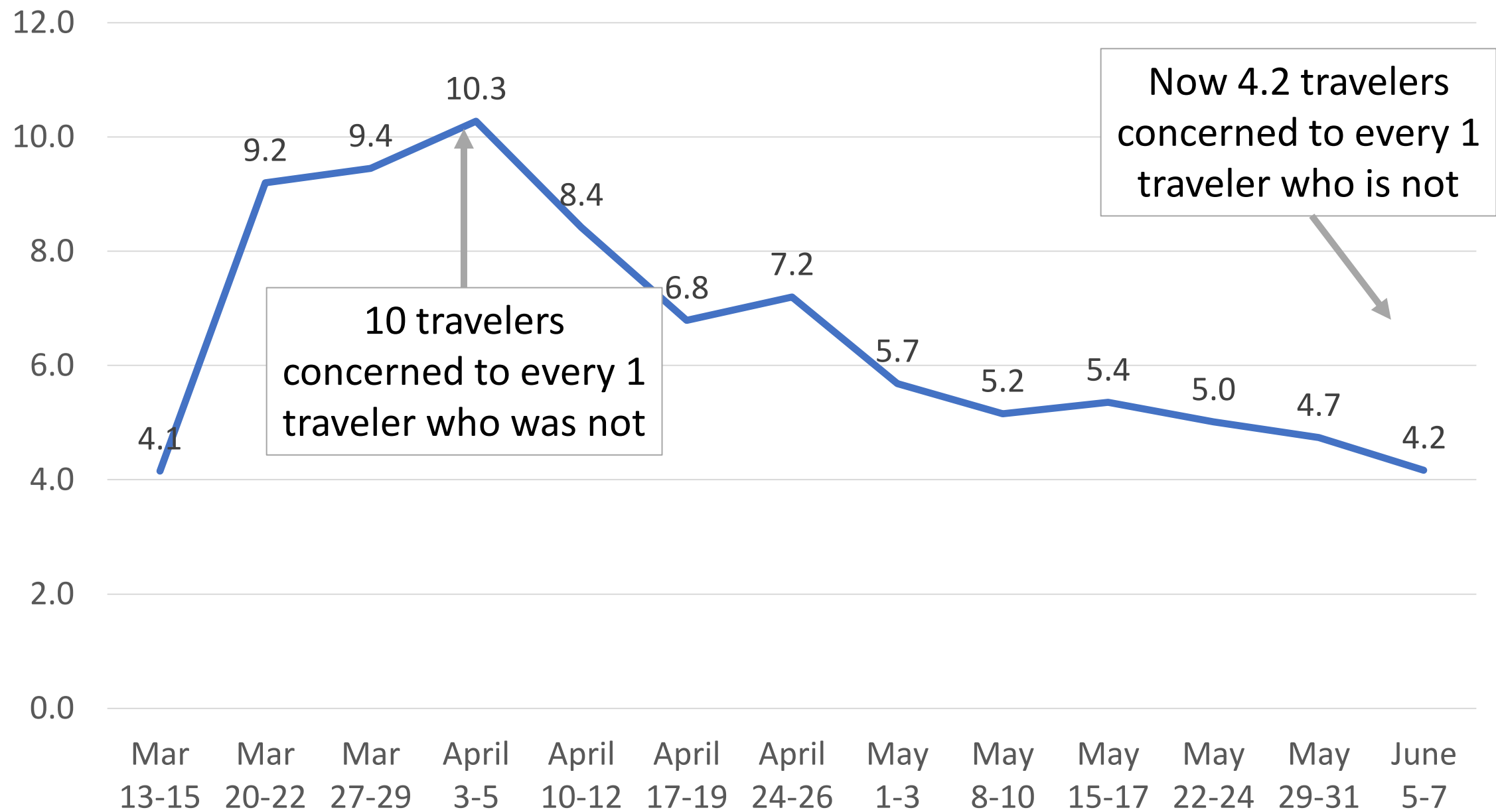
Personal Safety

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



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 PERSONALLY about contracting the virus? (Please answer using the scale below)

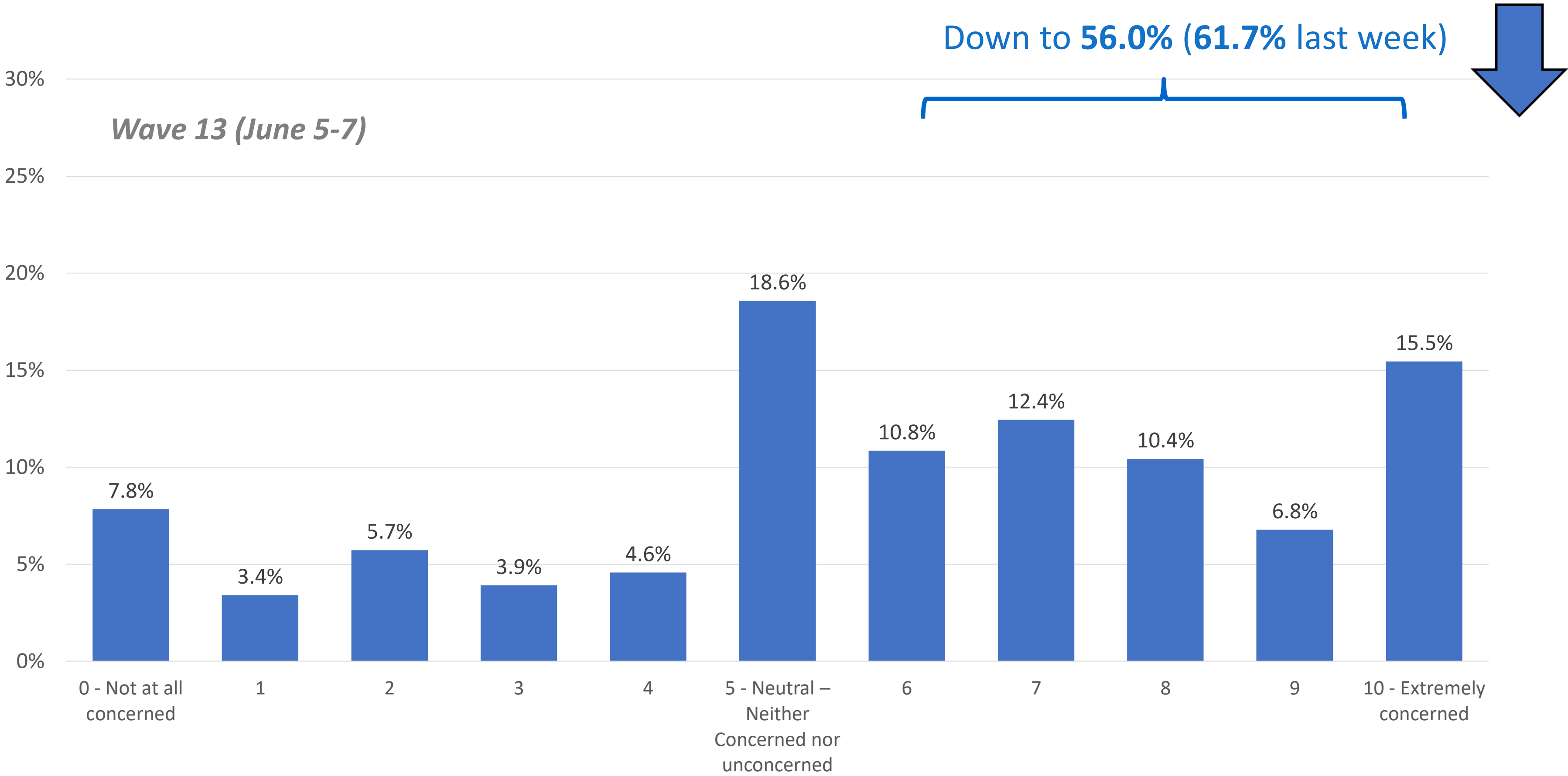
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Concerns About Personal Finances

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)

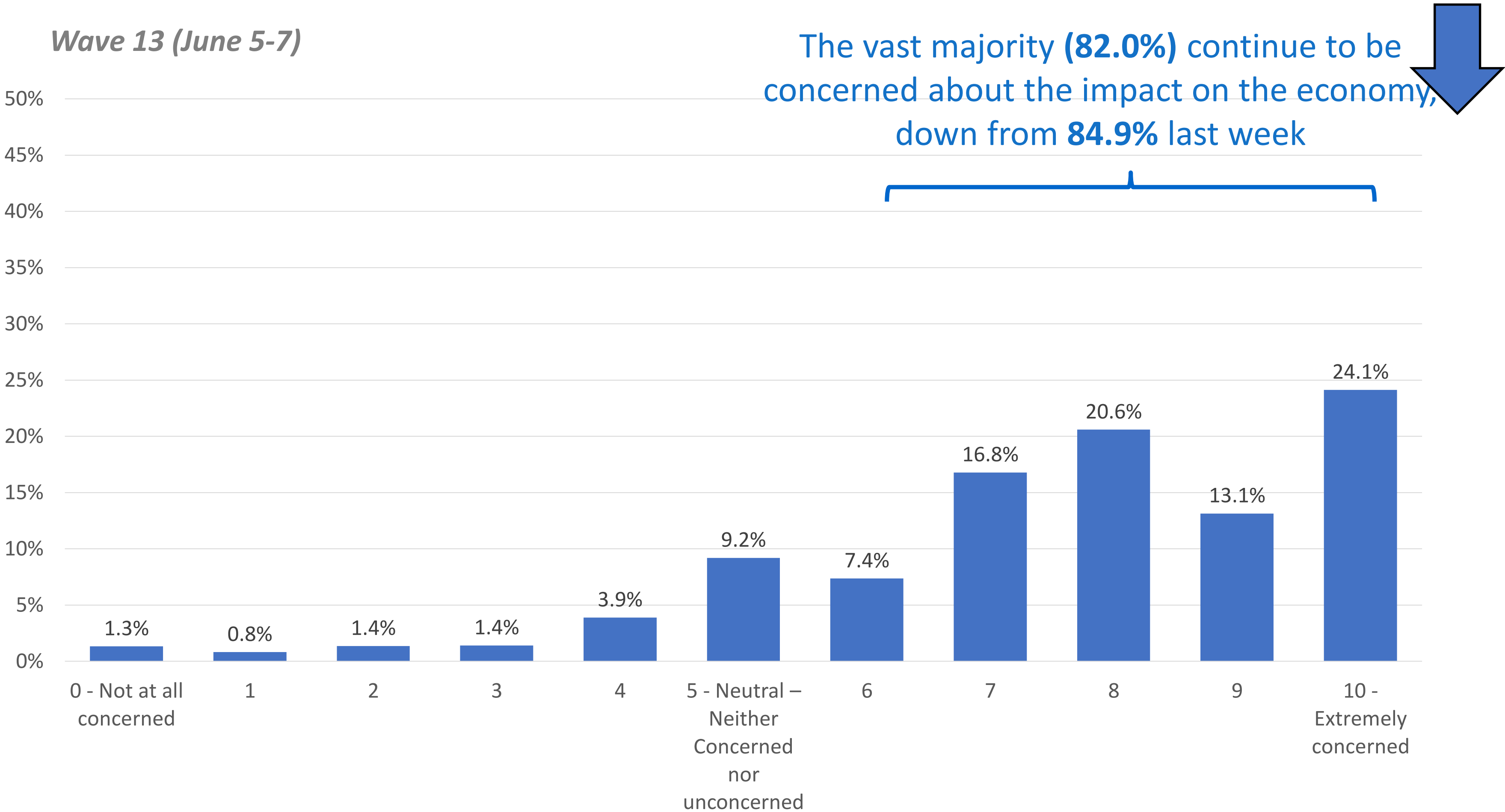
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



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?

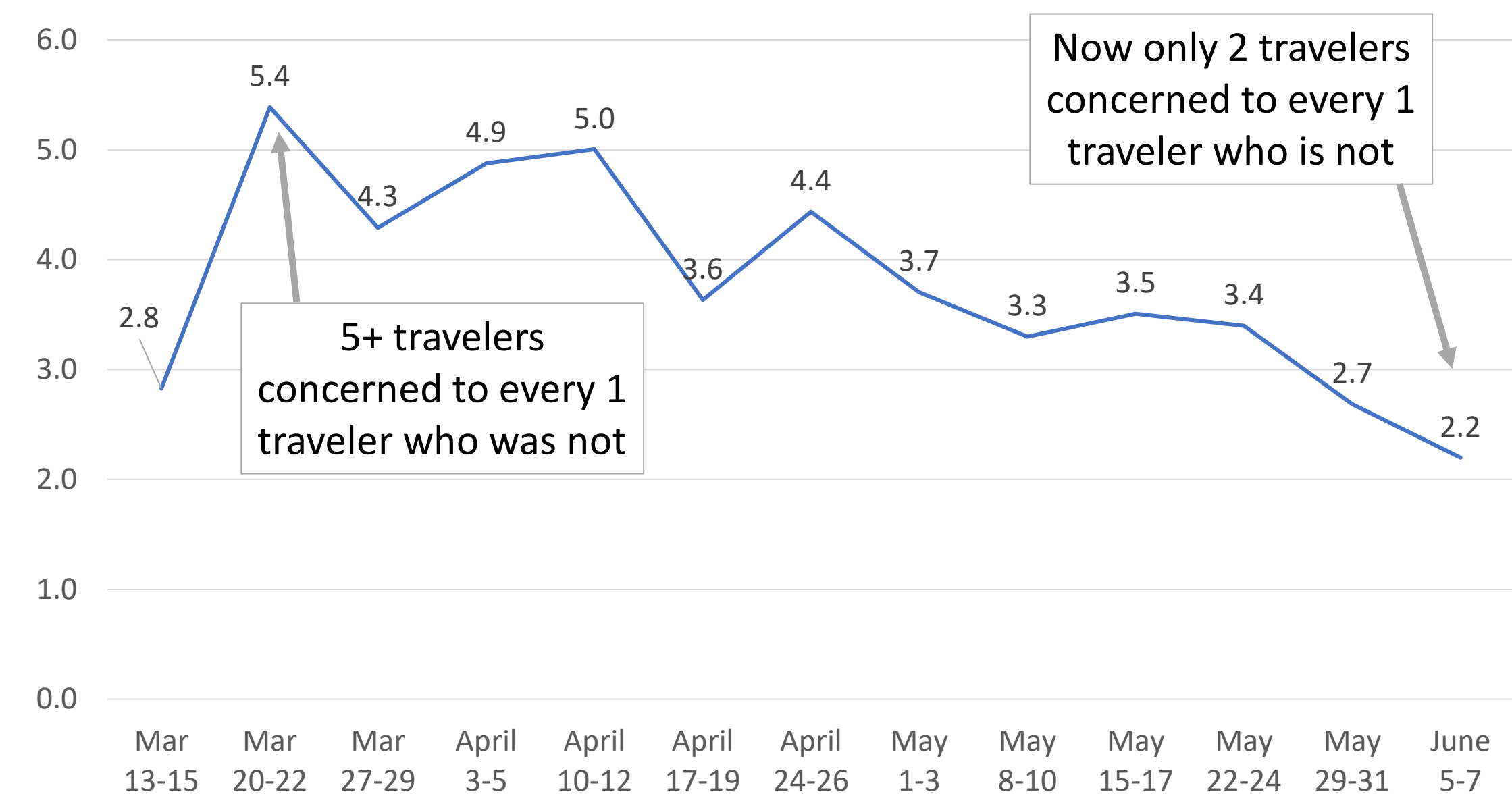
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Personal Finances

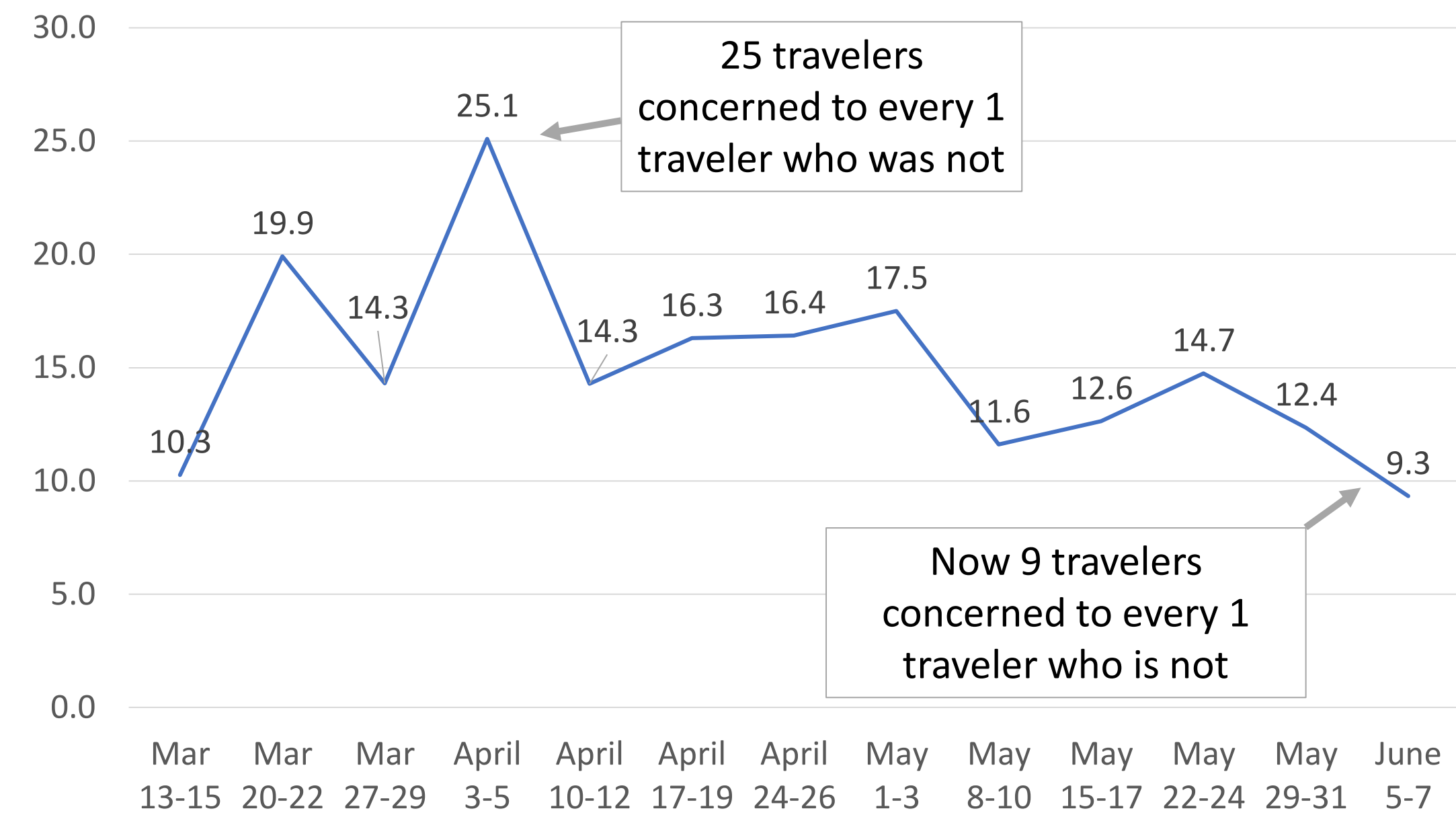
Ratio of concerned (10-6) to unconcerned (0-4) on 11-point scale)



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)



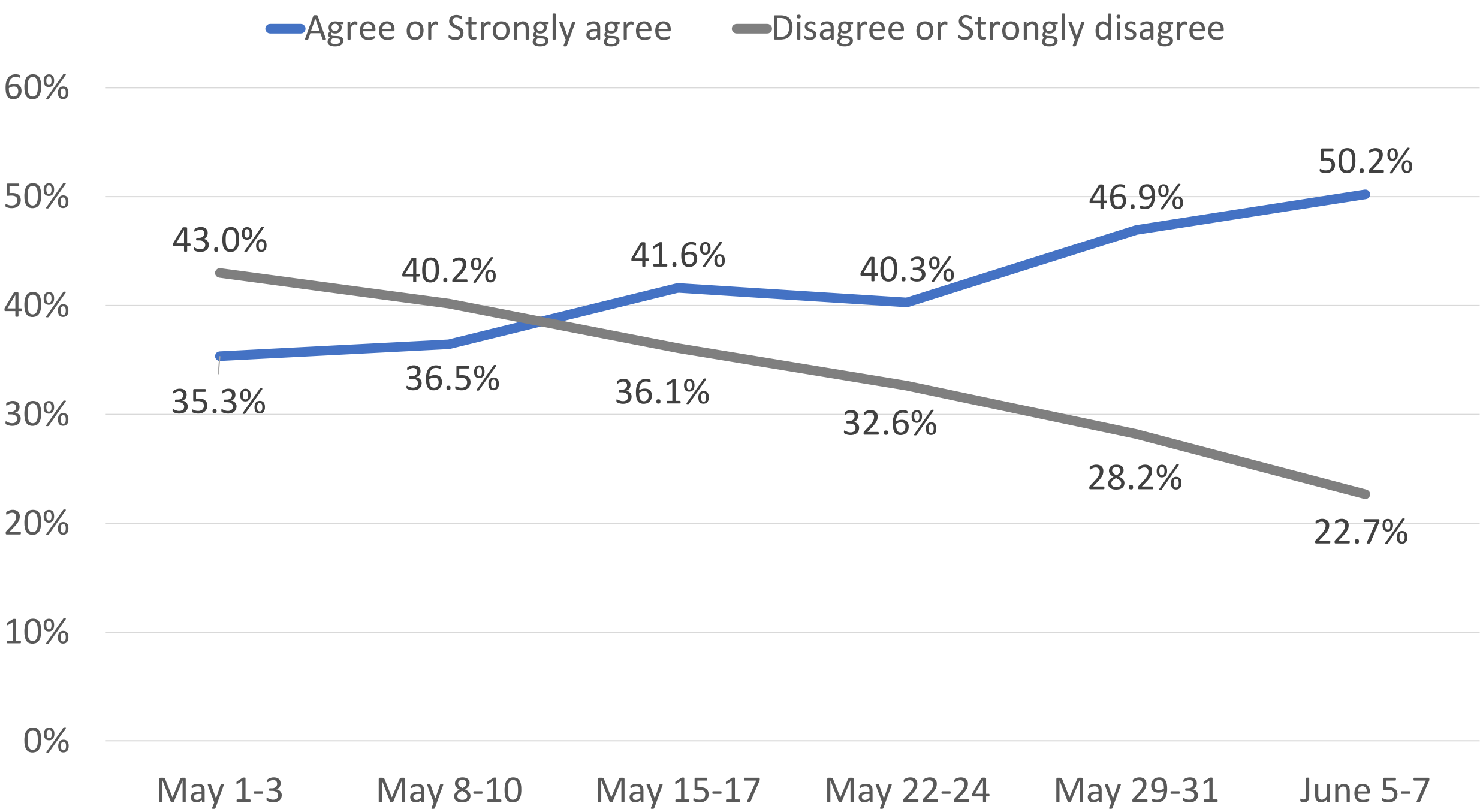
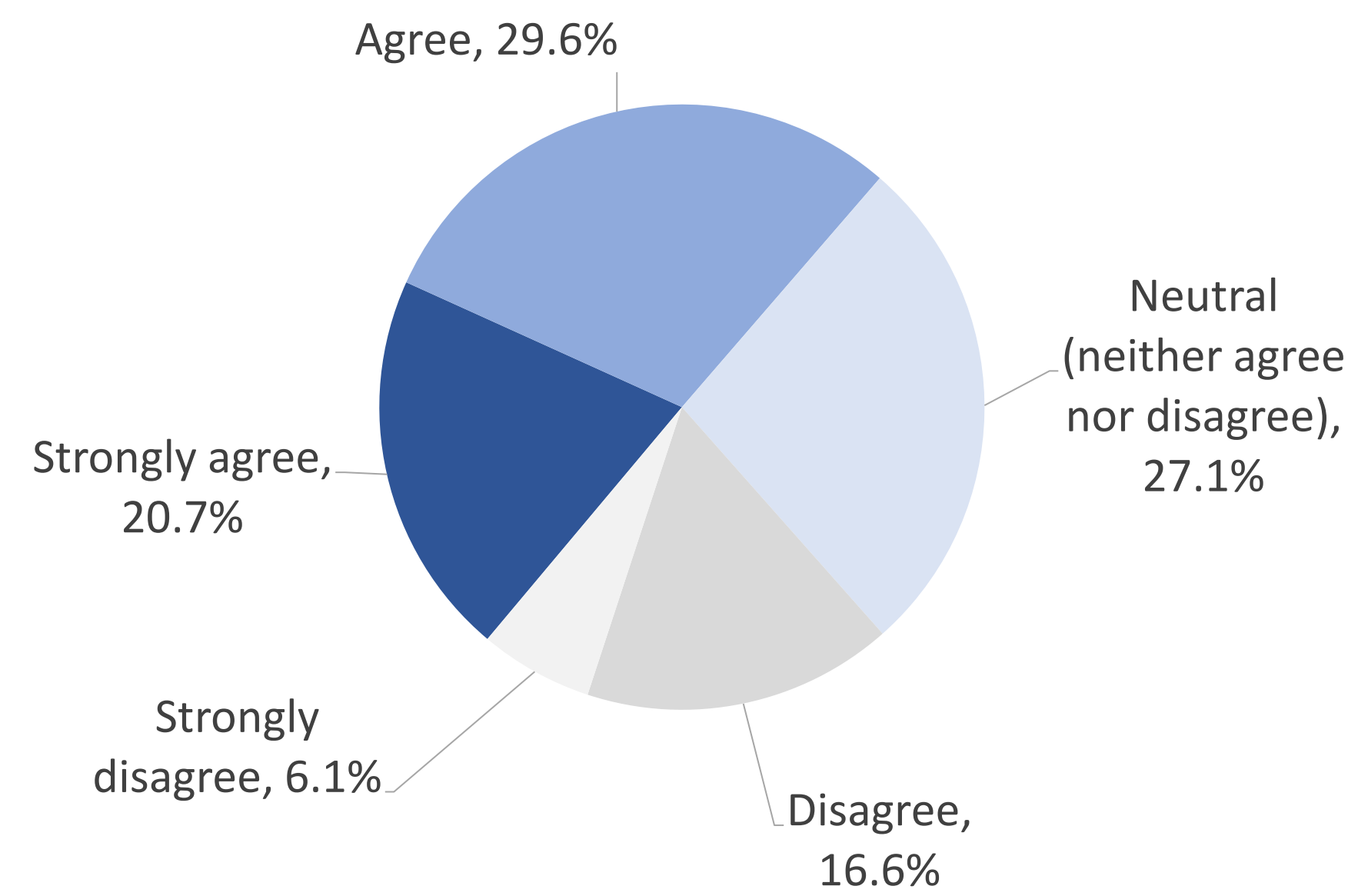
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Comfort with Home State Re-Opening

How much do you agree with the following statement?

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

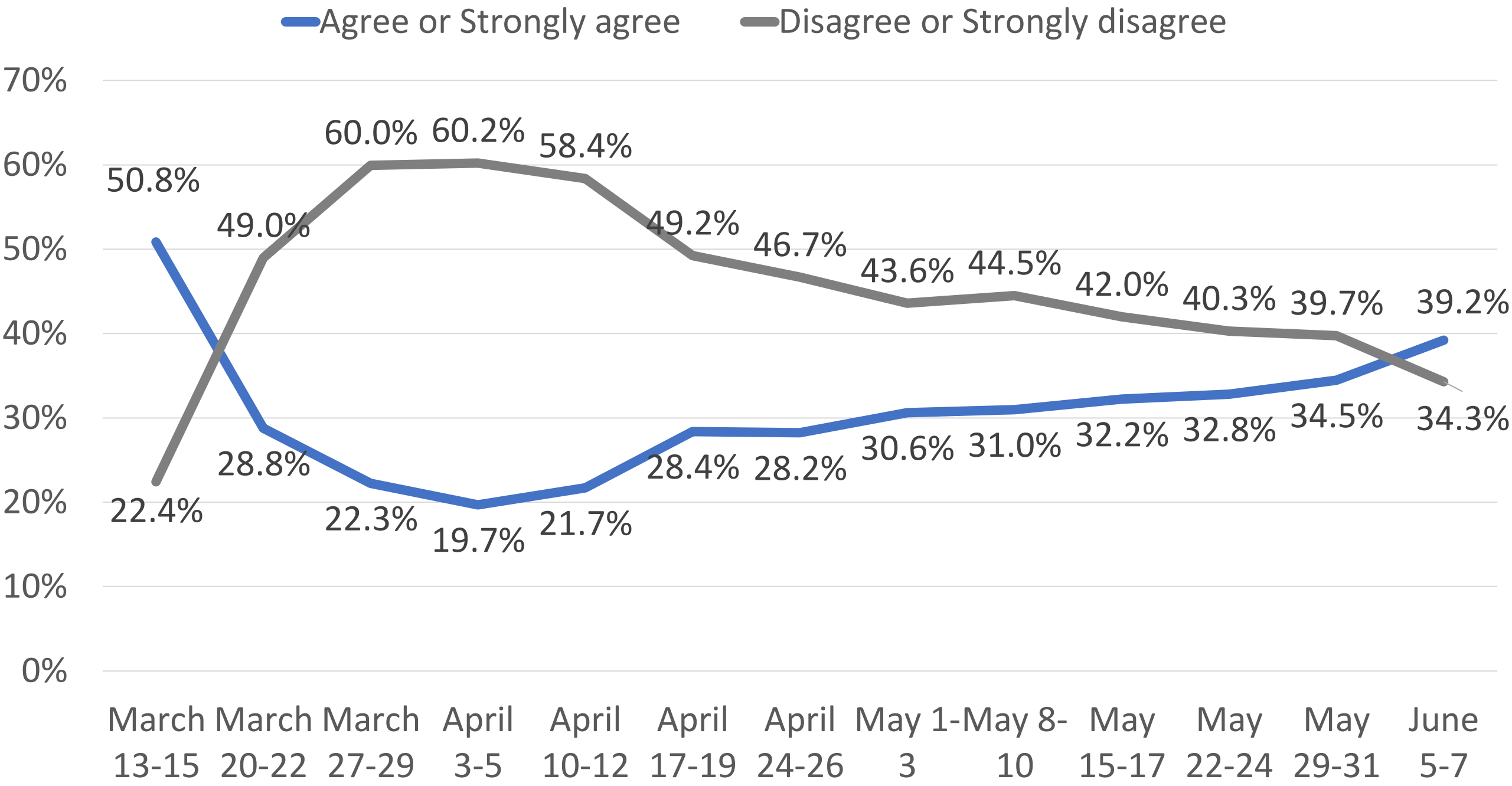
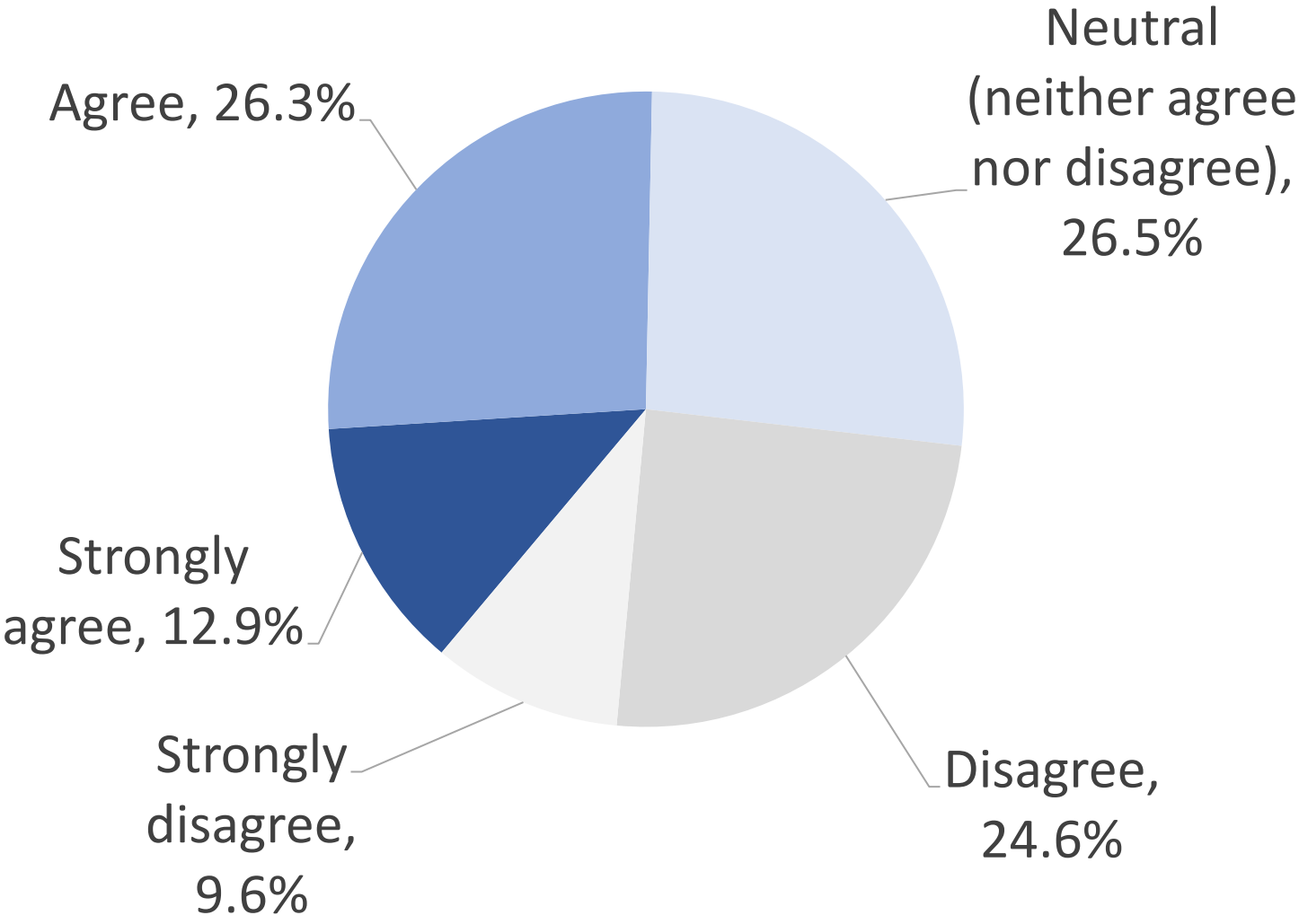


(Base: All respondents, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

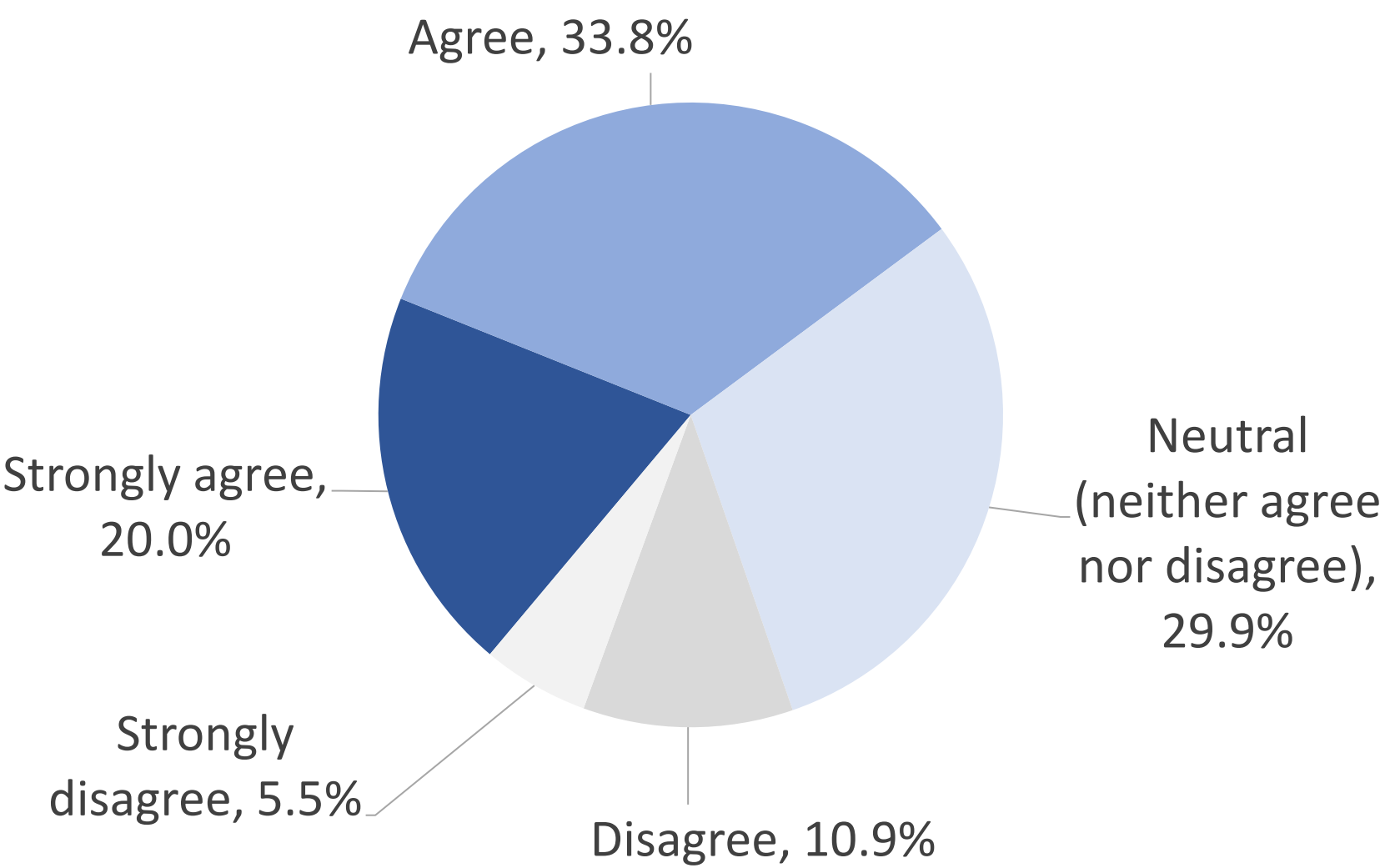


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

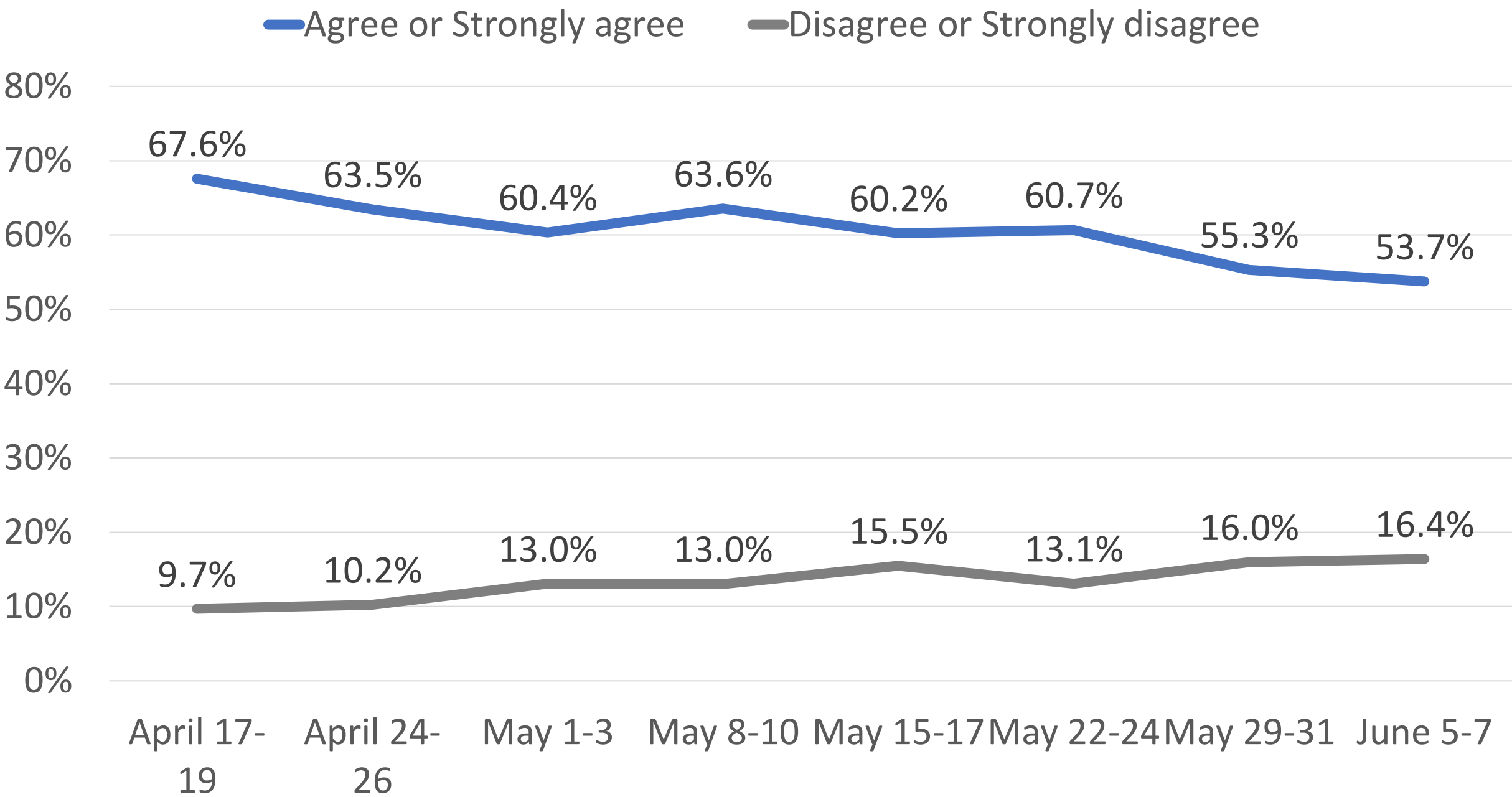
Travelers in Community are Unwanted

How much do you agree with the following statement?

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



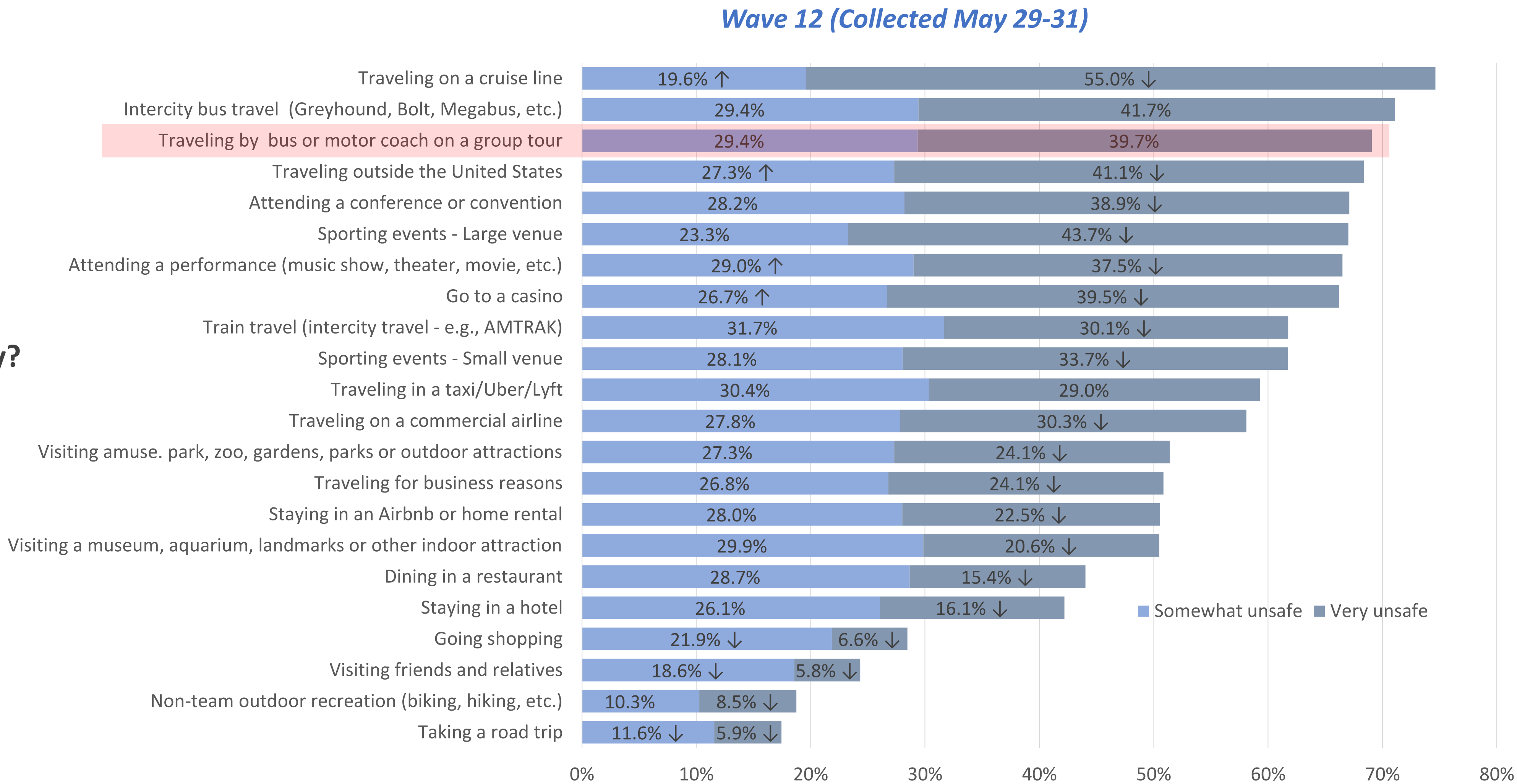
(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)



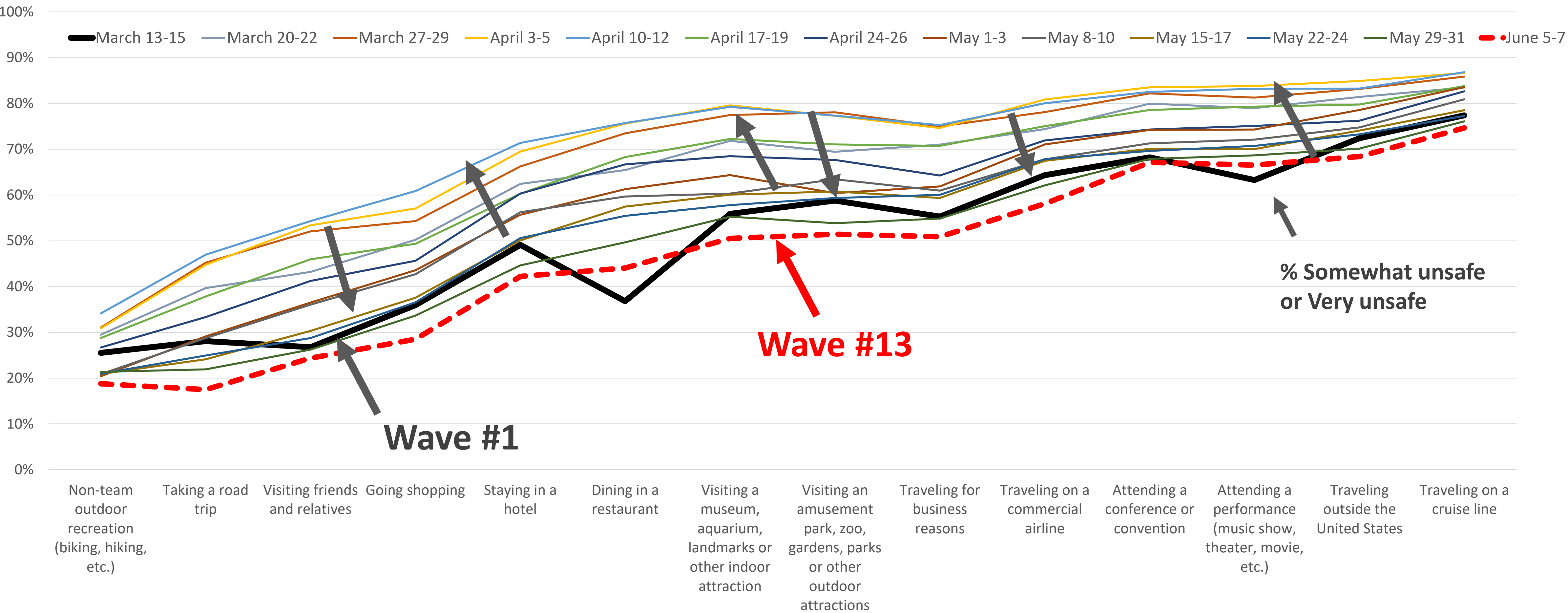
Perceived Safety of Travel Activities (Wave 13)

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

(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Perceived Safety of Travel Activities (Waves 1-13 Comparison)



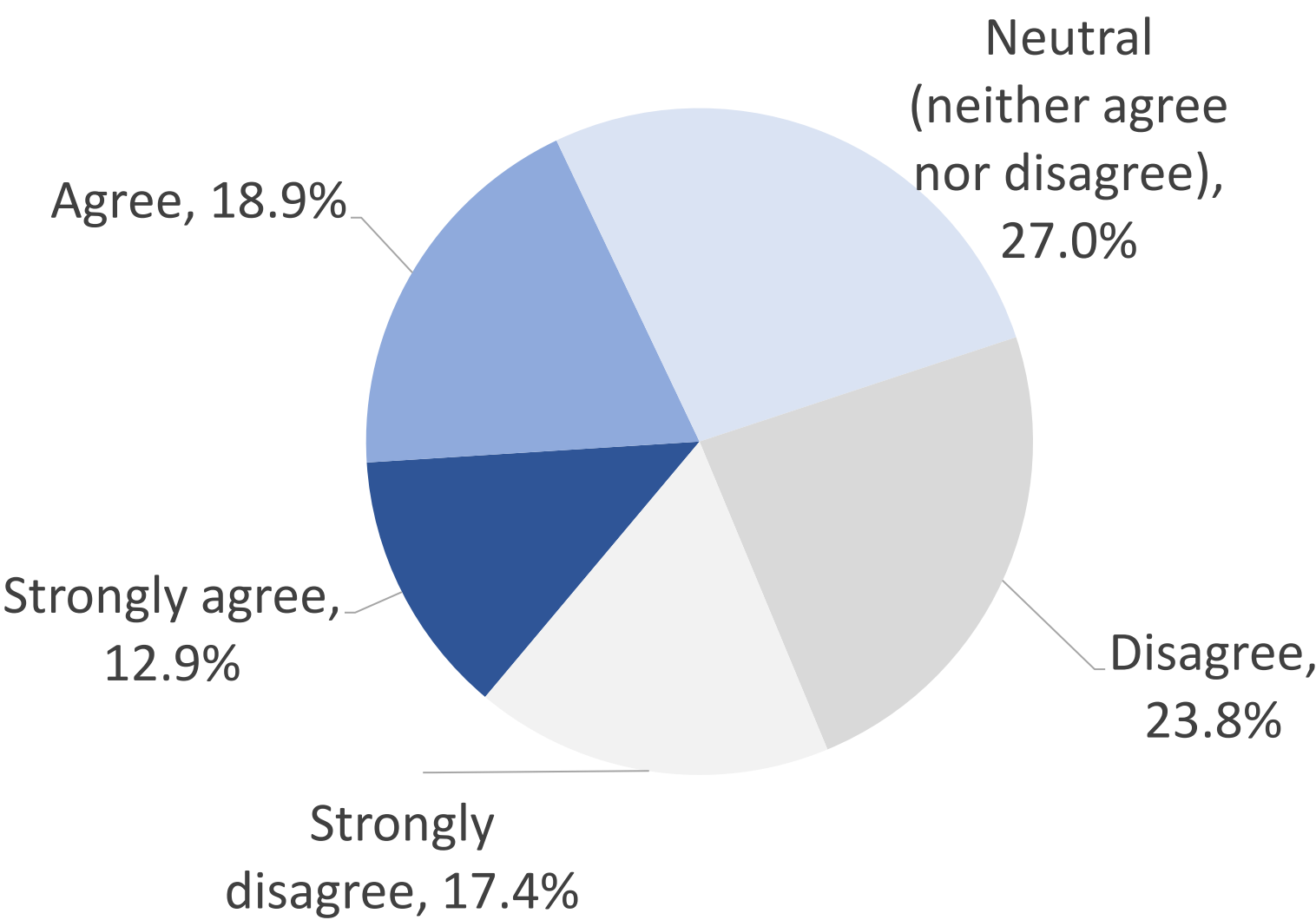
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 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 and June 5-7, 2020)

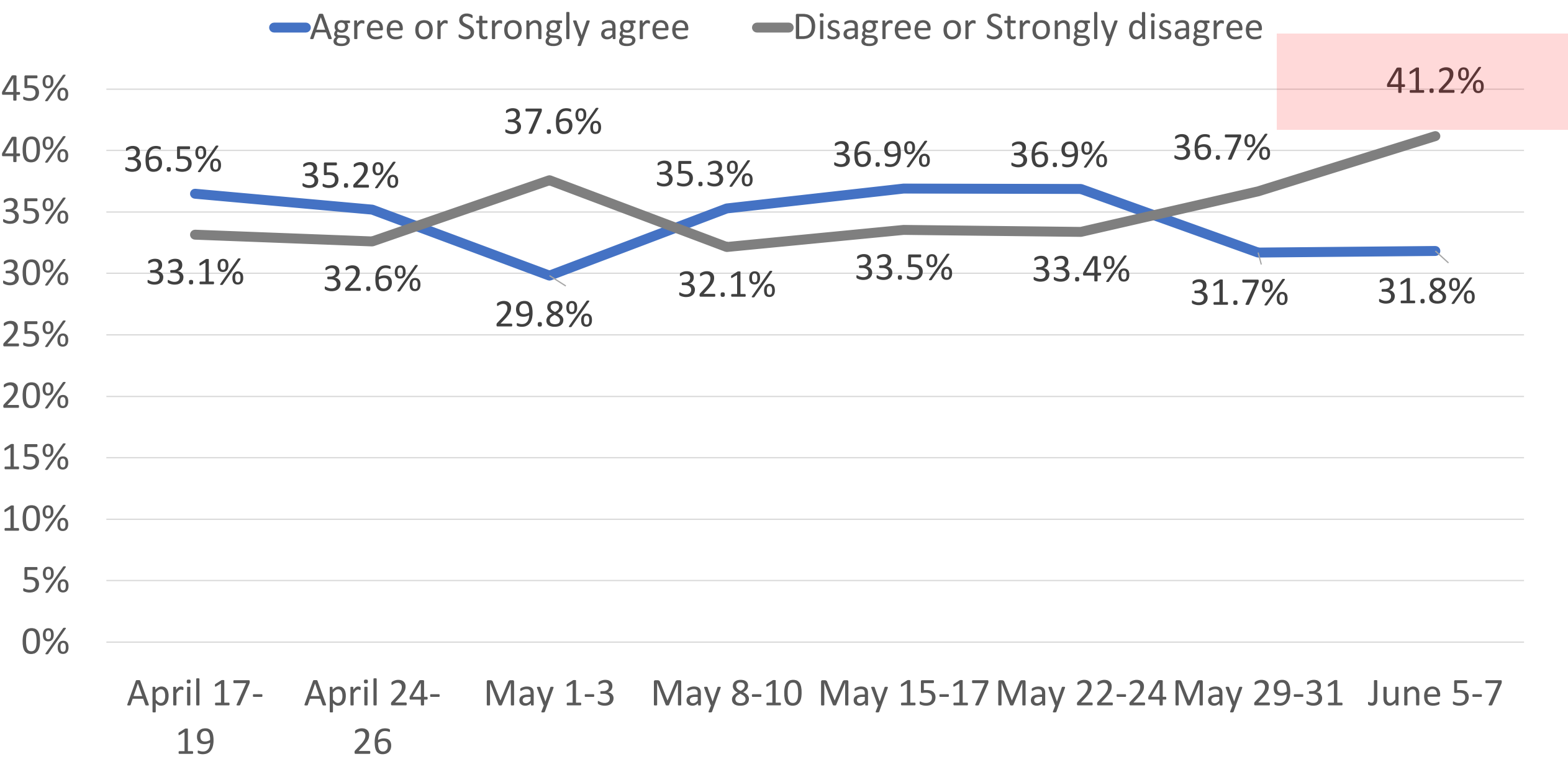
Won't Travel Without Vaccine

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, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)





KEY TAKEAWAYS

- **American travelers' feelings about their health, financial and travel safety from coronavirus continue to improve**
- **Still, these metrics remain at abnormally high levels**
- **Recent social unrest worsens the near-term outlook for some**

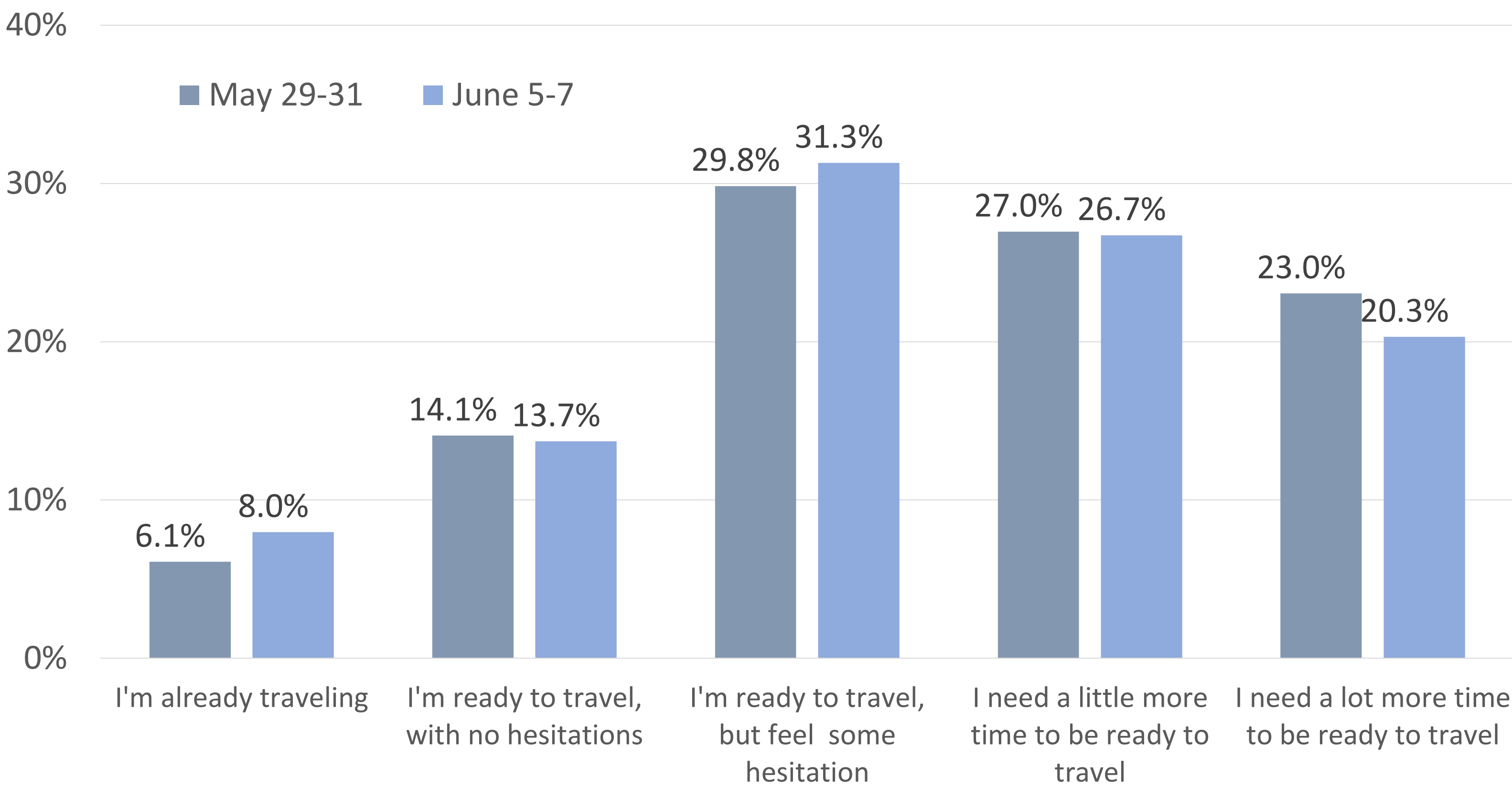
A hand is visible from a car window, giving a thumbs up gesture. The background shows a blurred road and trees, suggesting a travel setting. The text "Feelings on Travel Readiness" is overlaid in white.

Feelings on Travel Readiness

Current State of Mind Regarding Travel

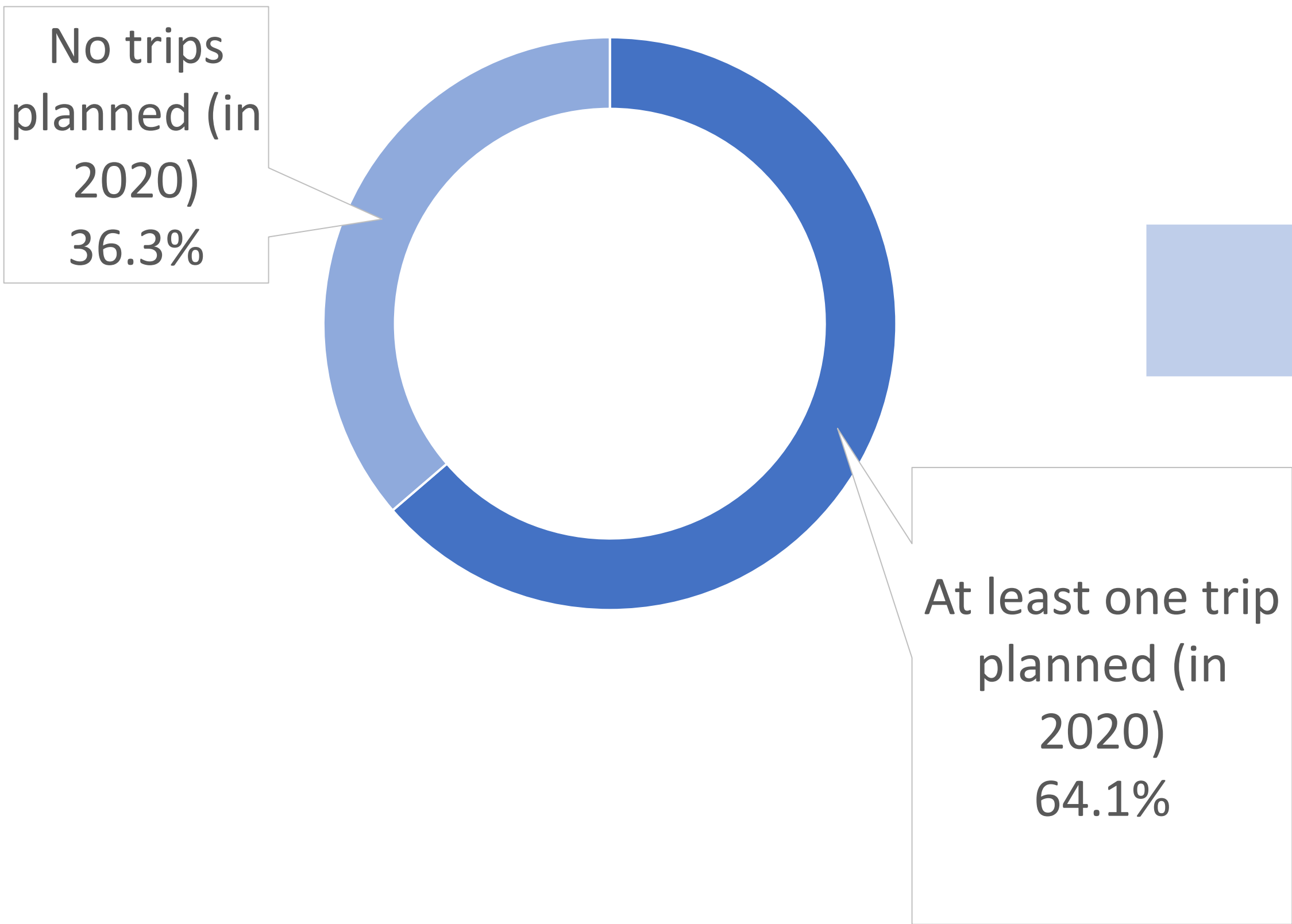
Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

(Base: All respondents, 1,257 completed surveys. Data collected May 29-31, 2020)

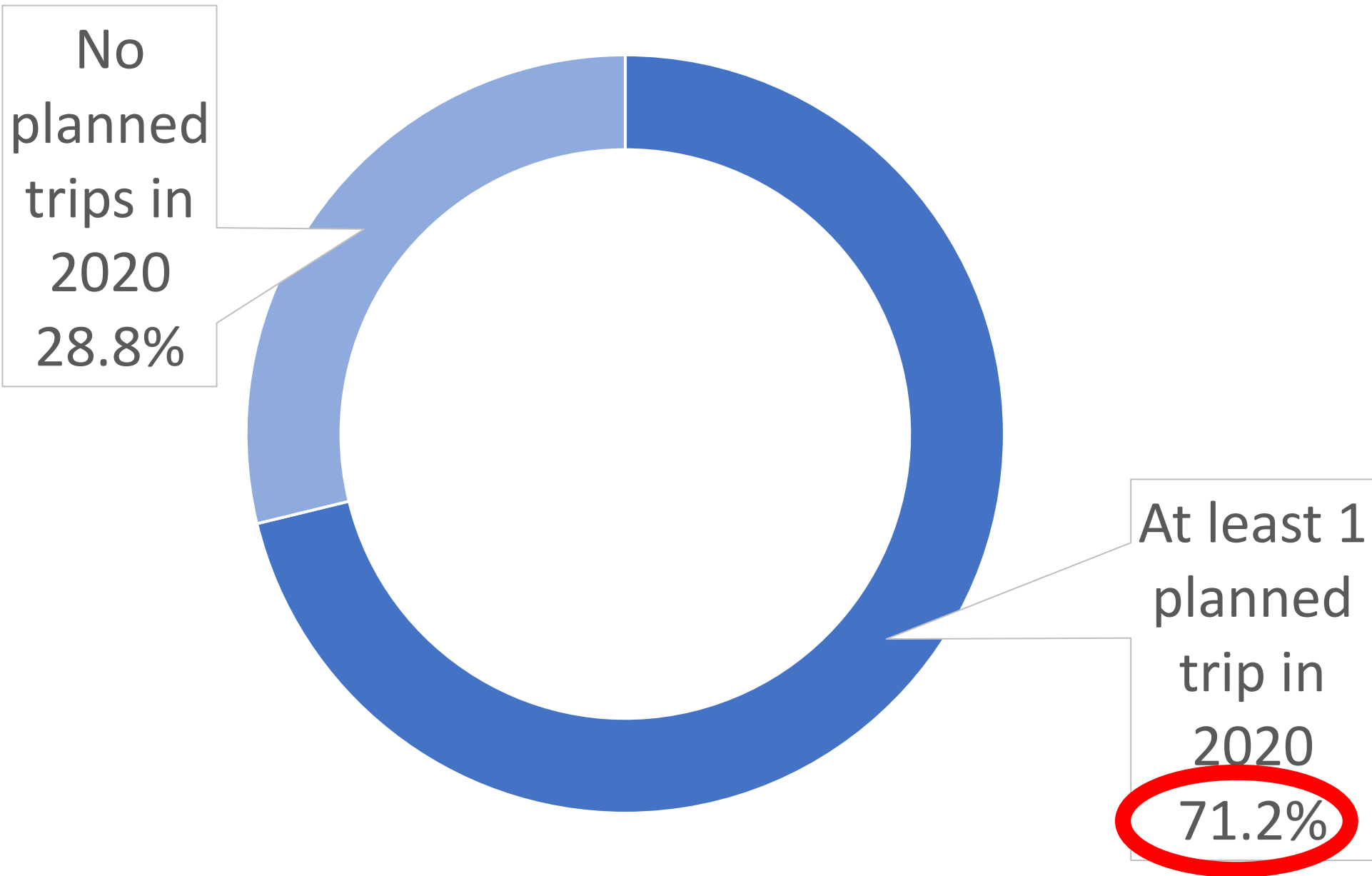


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

3 Weeks Ago

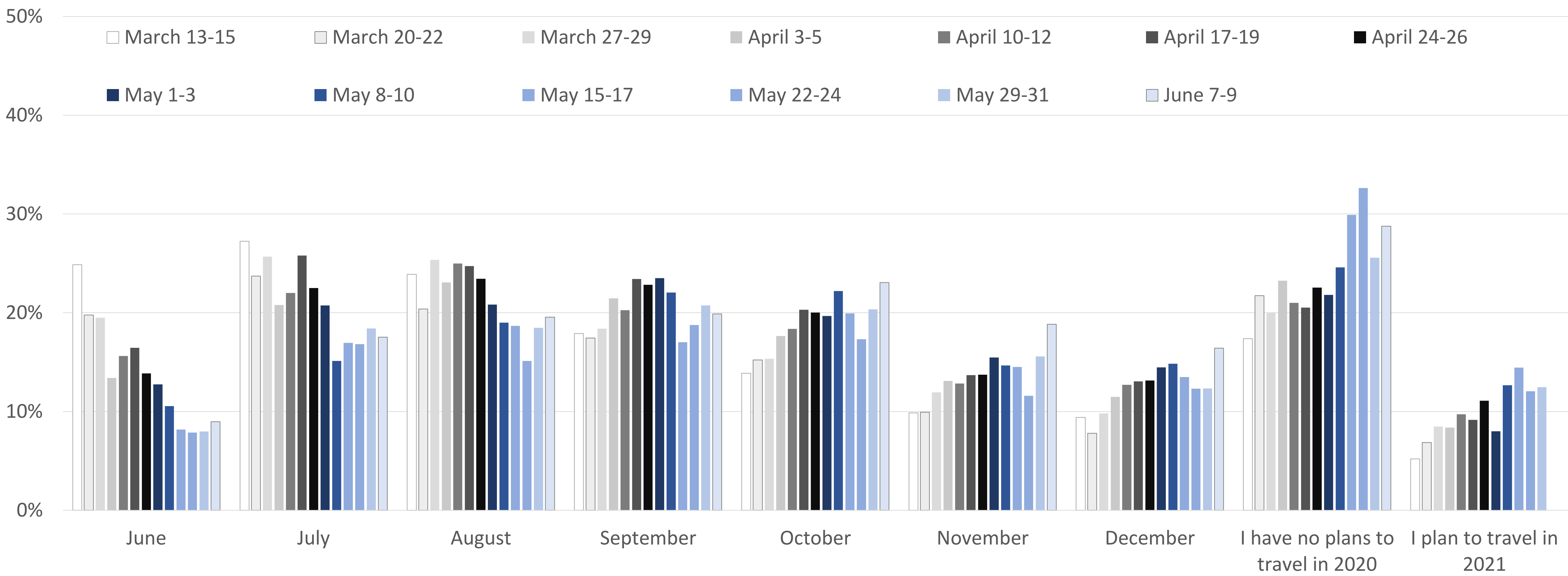


Today



Upcoming Travel Plans

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

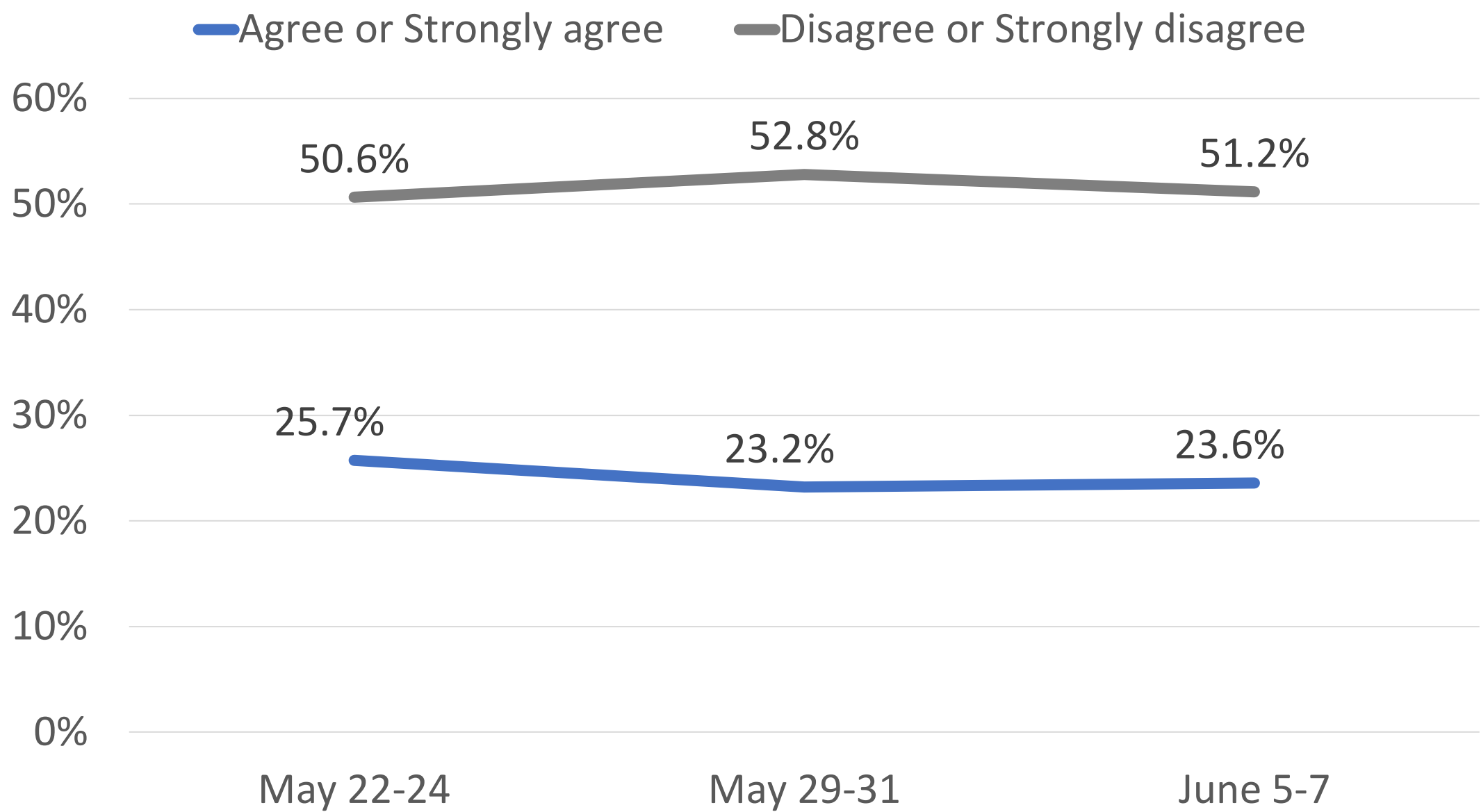
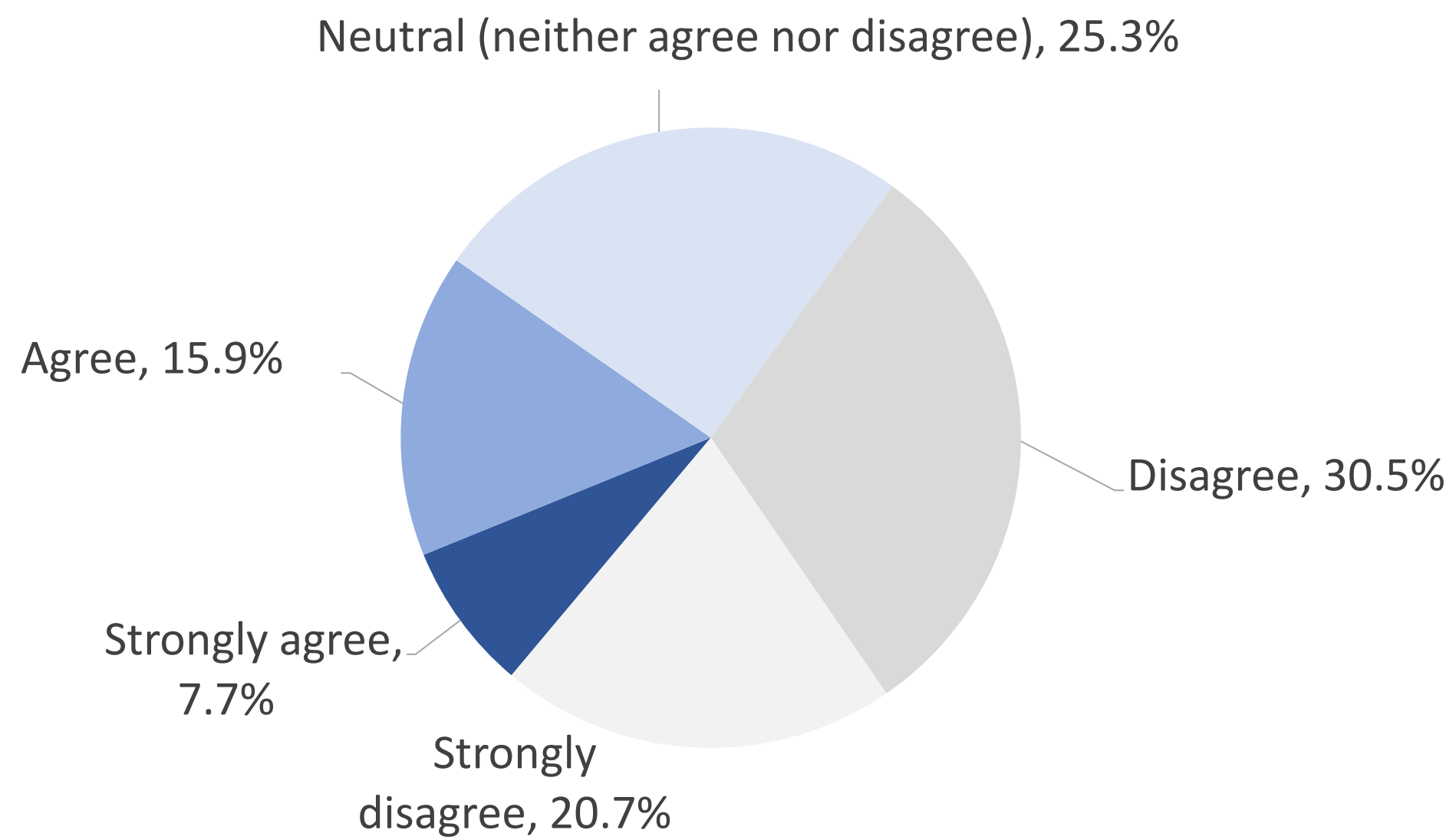


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

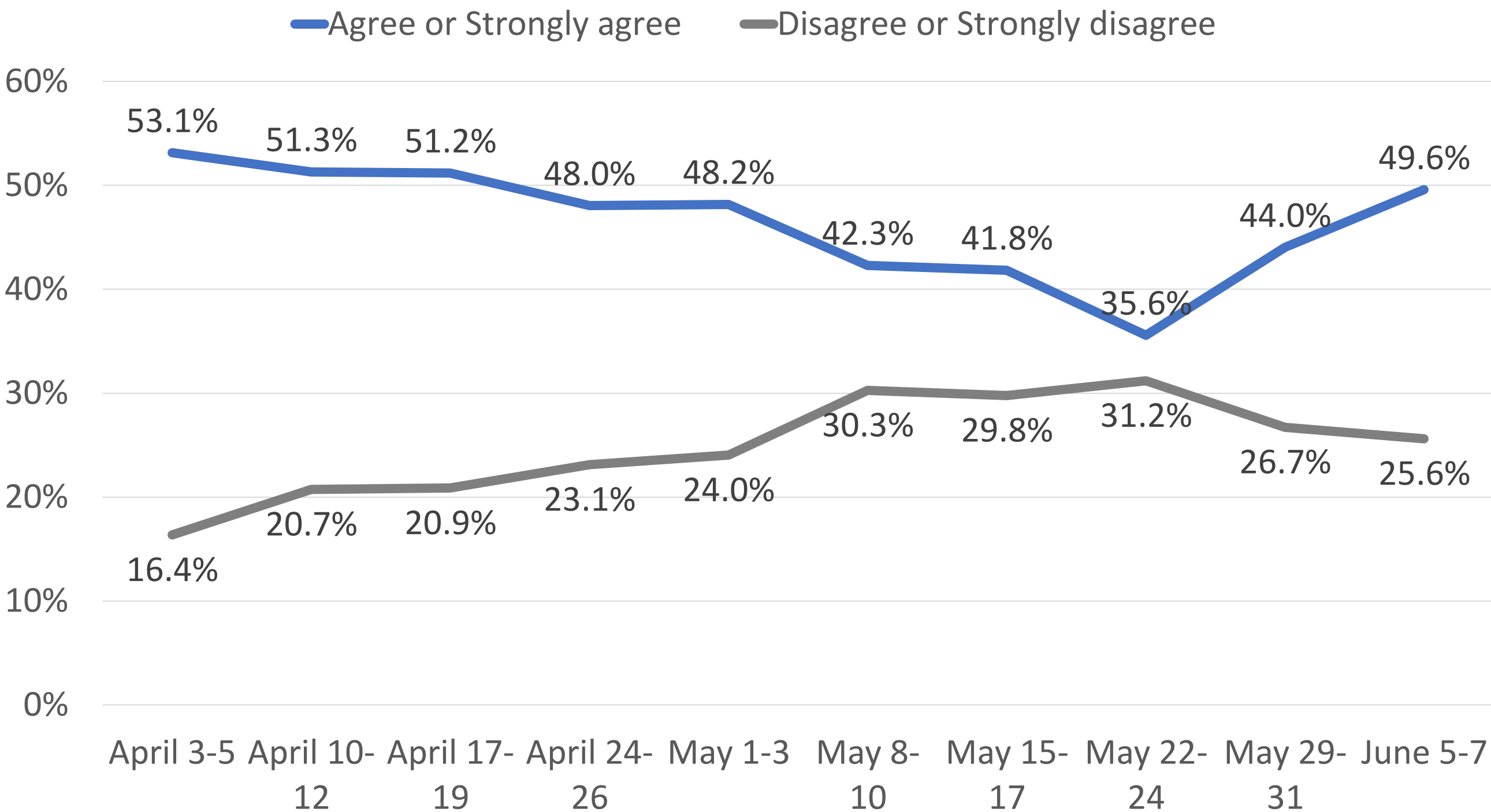
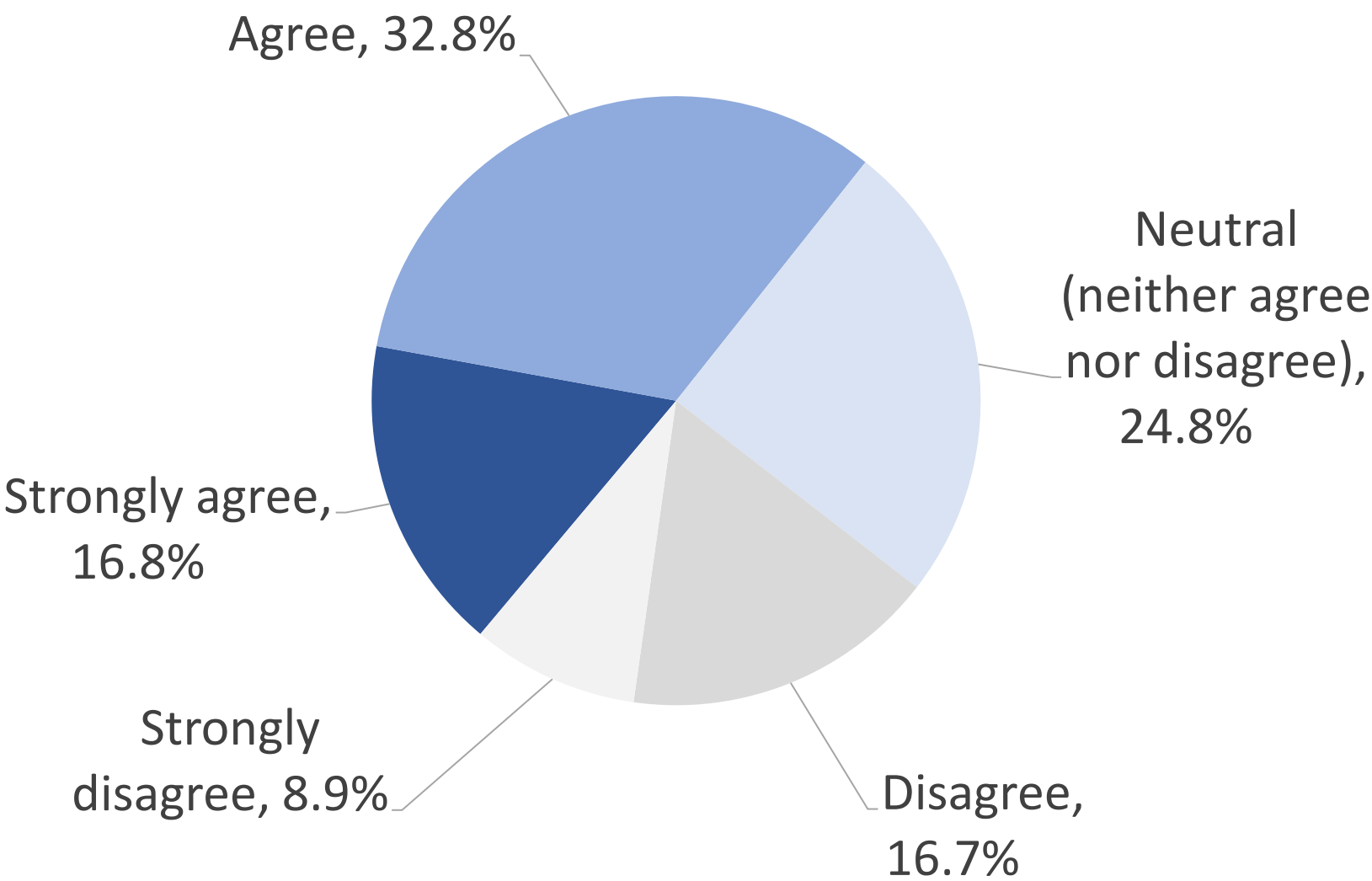


(Base: All respondents, 1,223, 1,257 and 1,214 completed surveys. Data collected, May 22-24, 29-31 and June 5-7, 2020)

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.

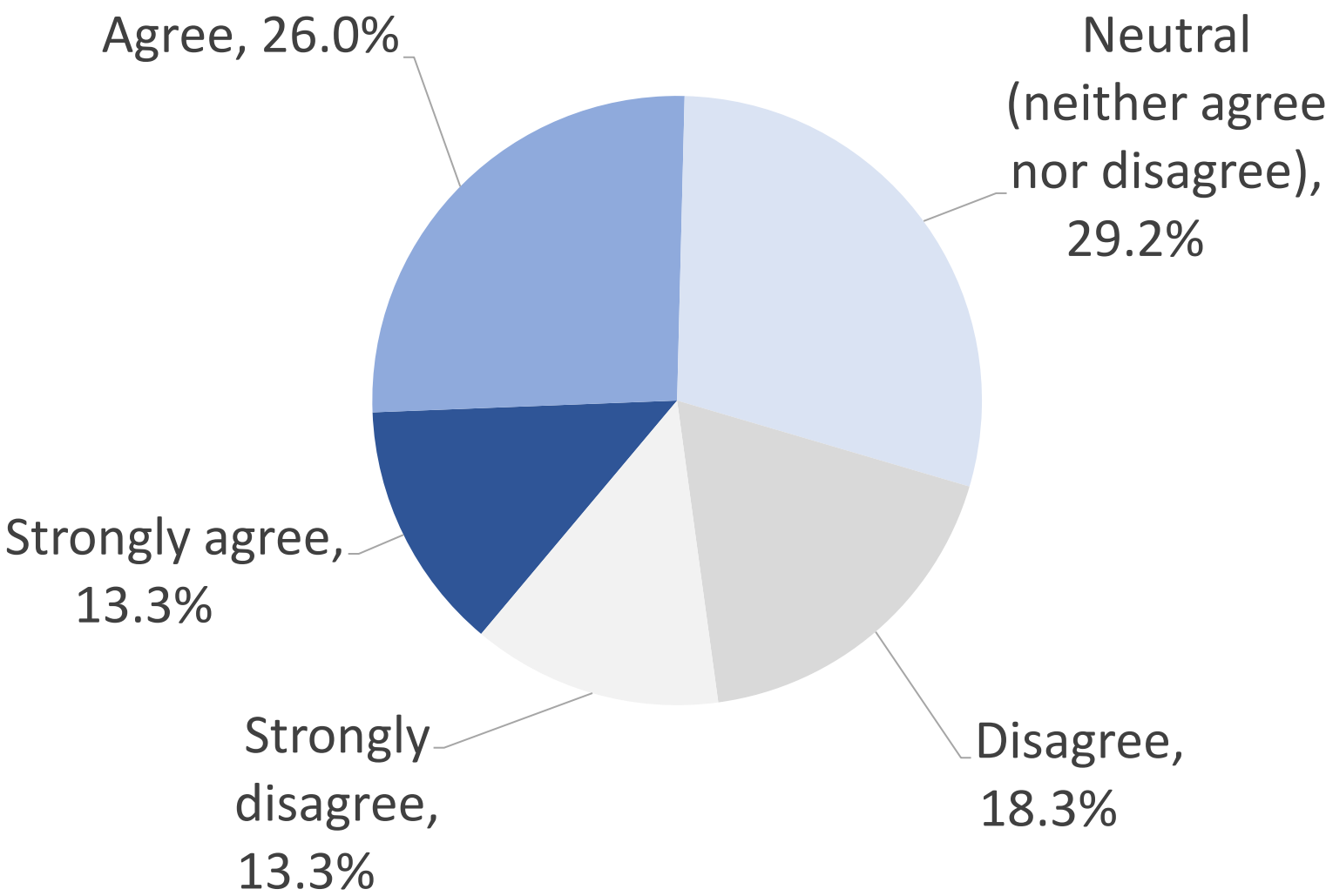


(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

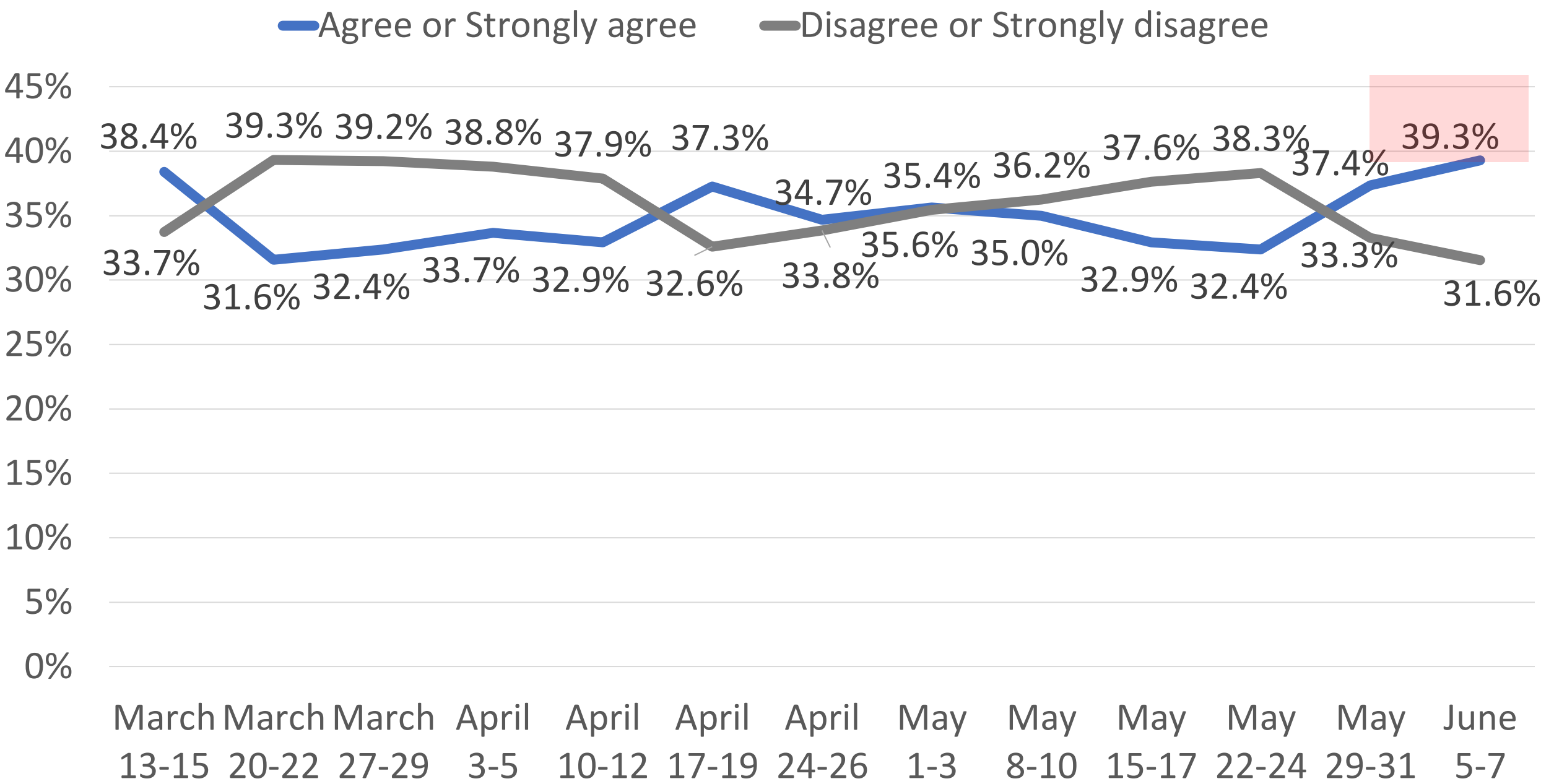
Discounts and Price Cuts

How much do you agree with the following statement?

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



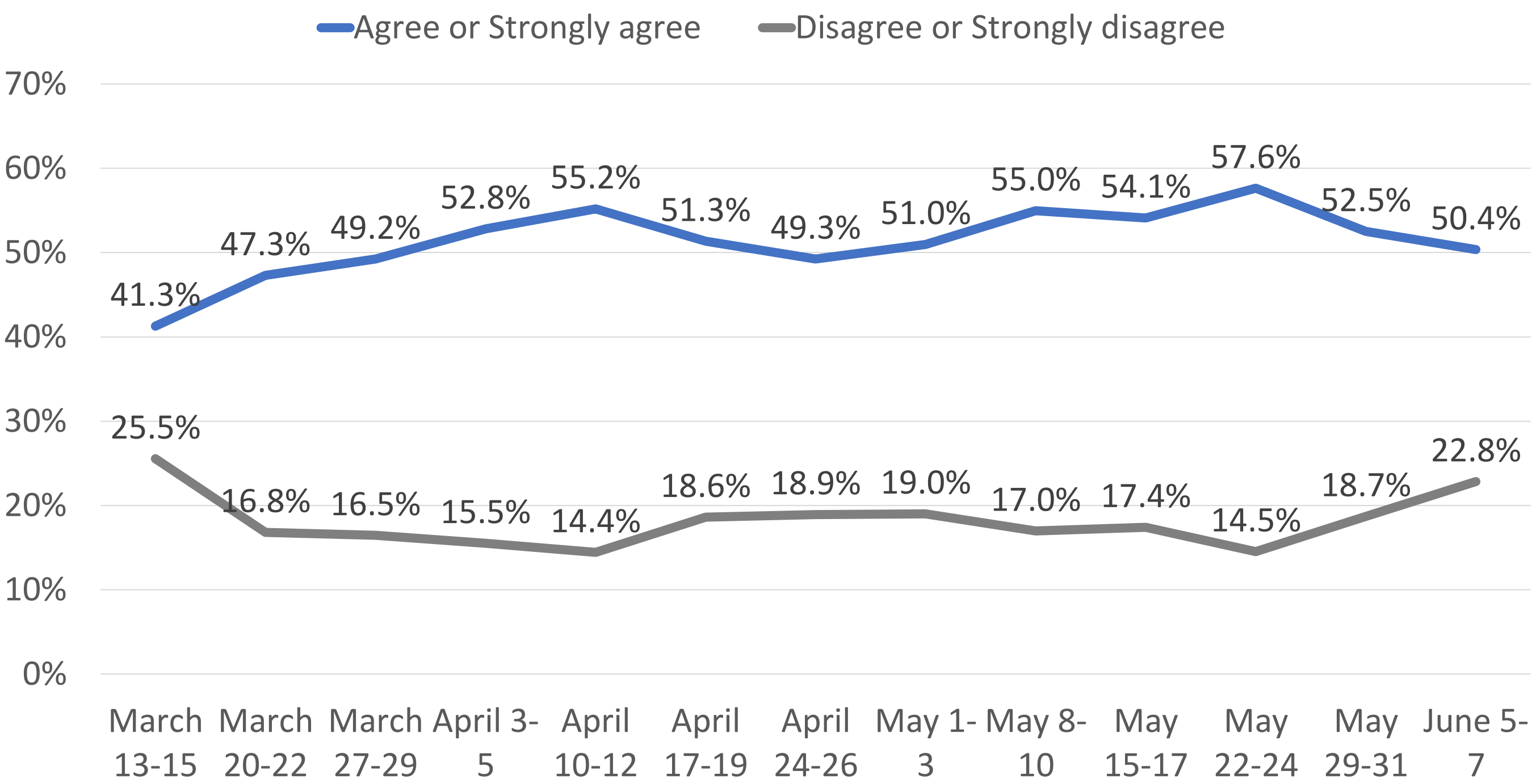
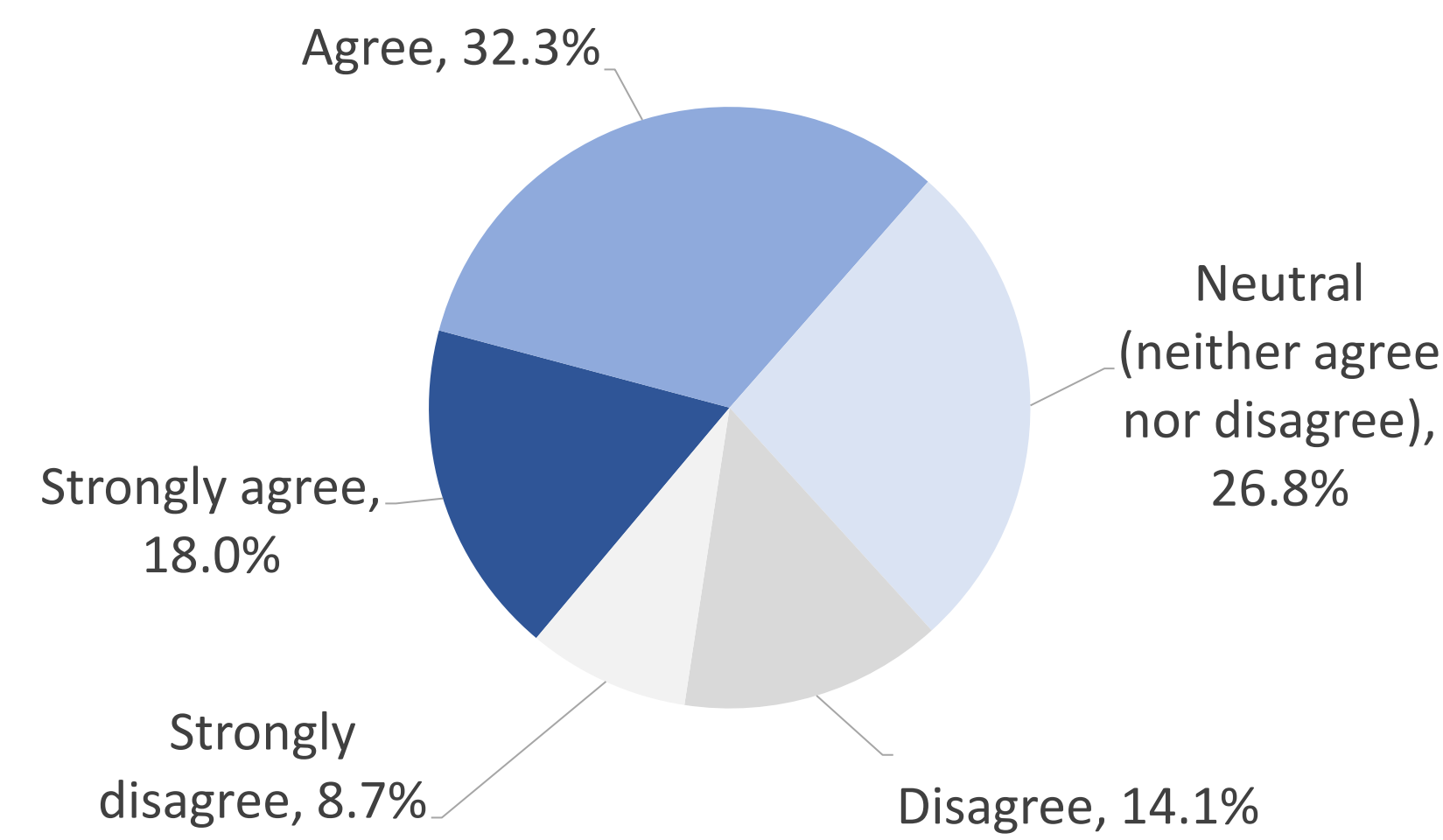
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Staycations as a Replacement for Vacations

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).

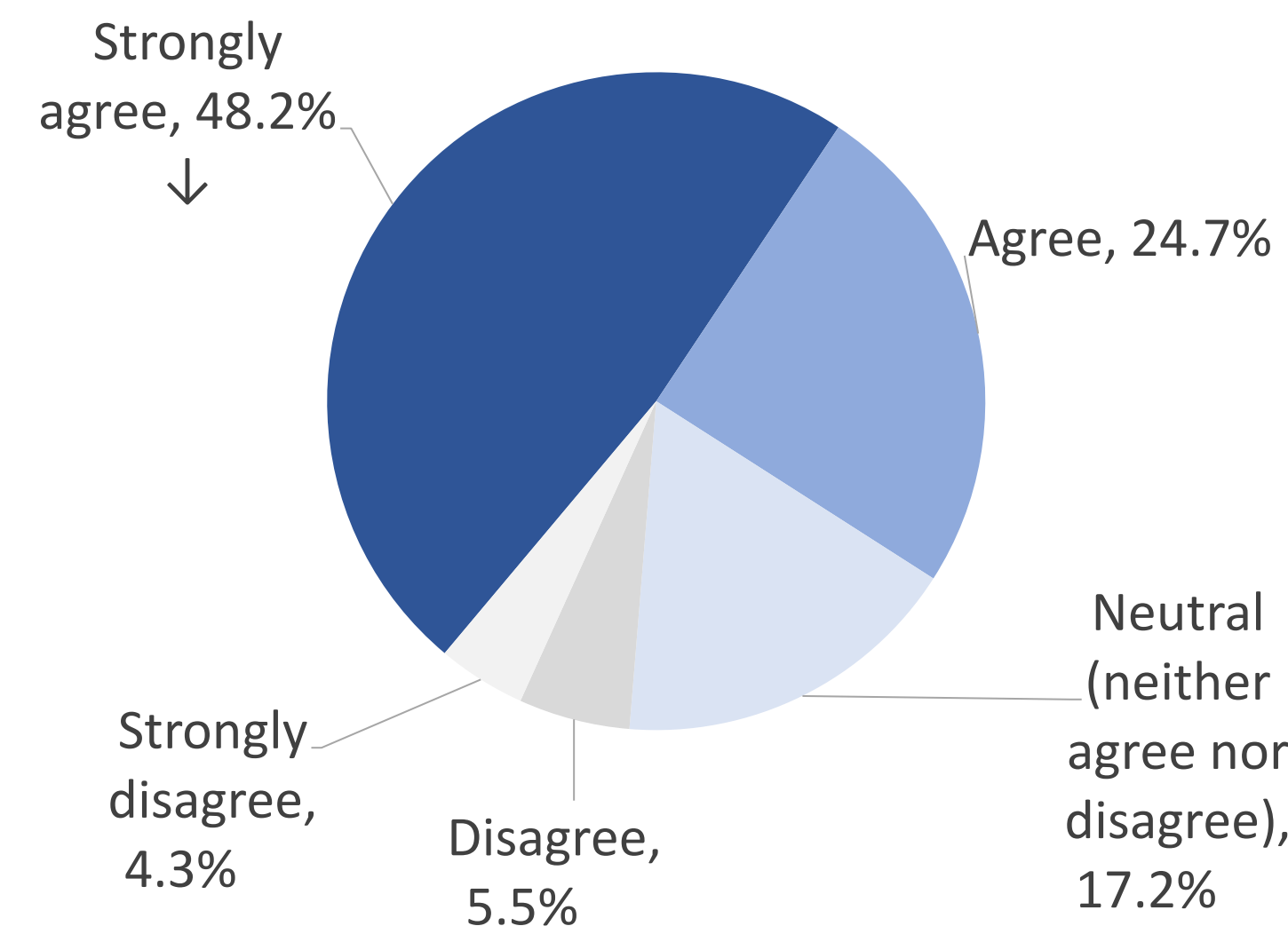


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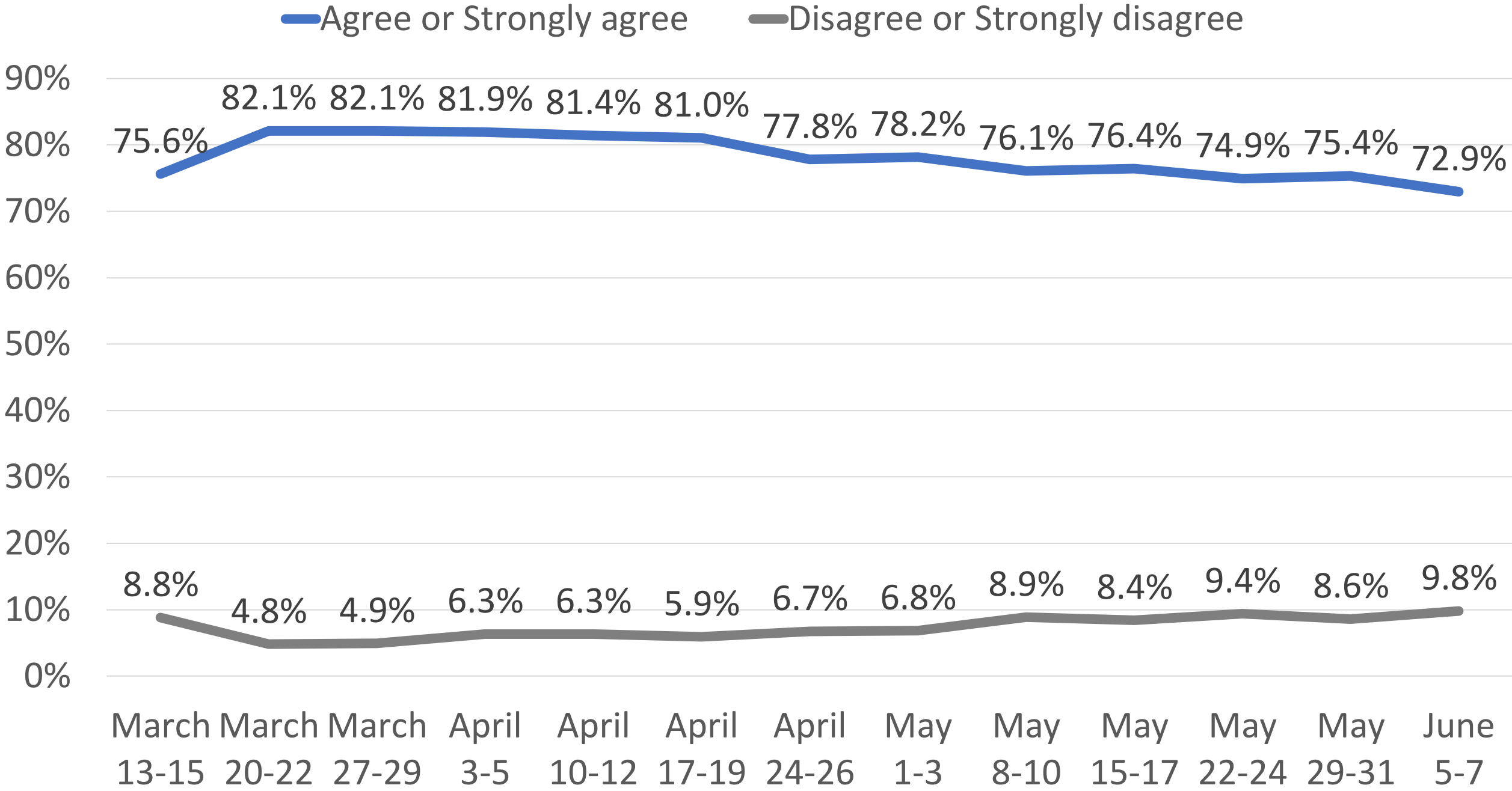
Avoiding International Travel

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.



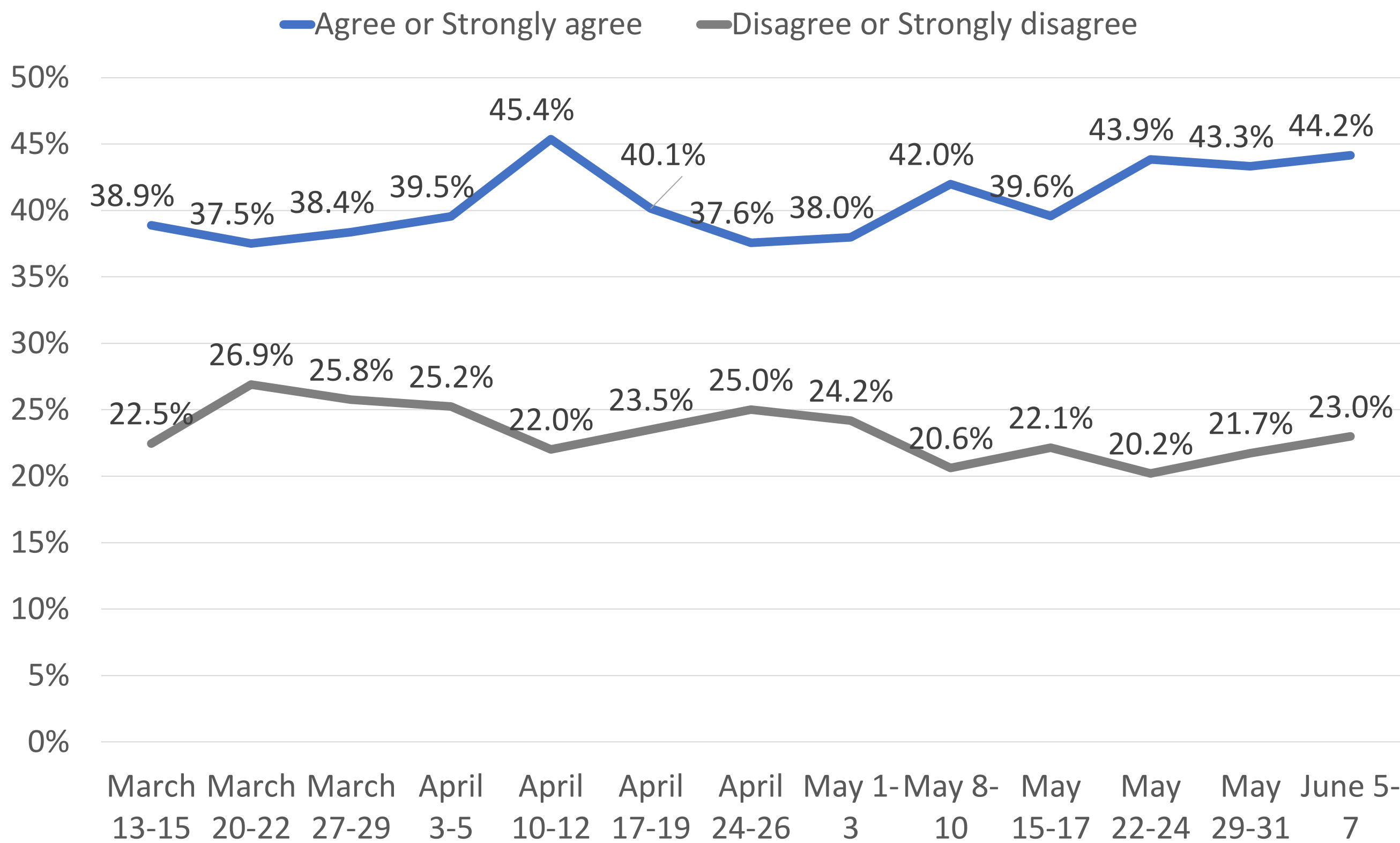
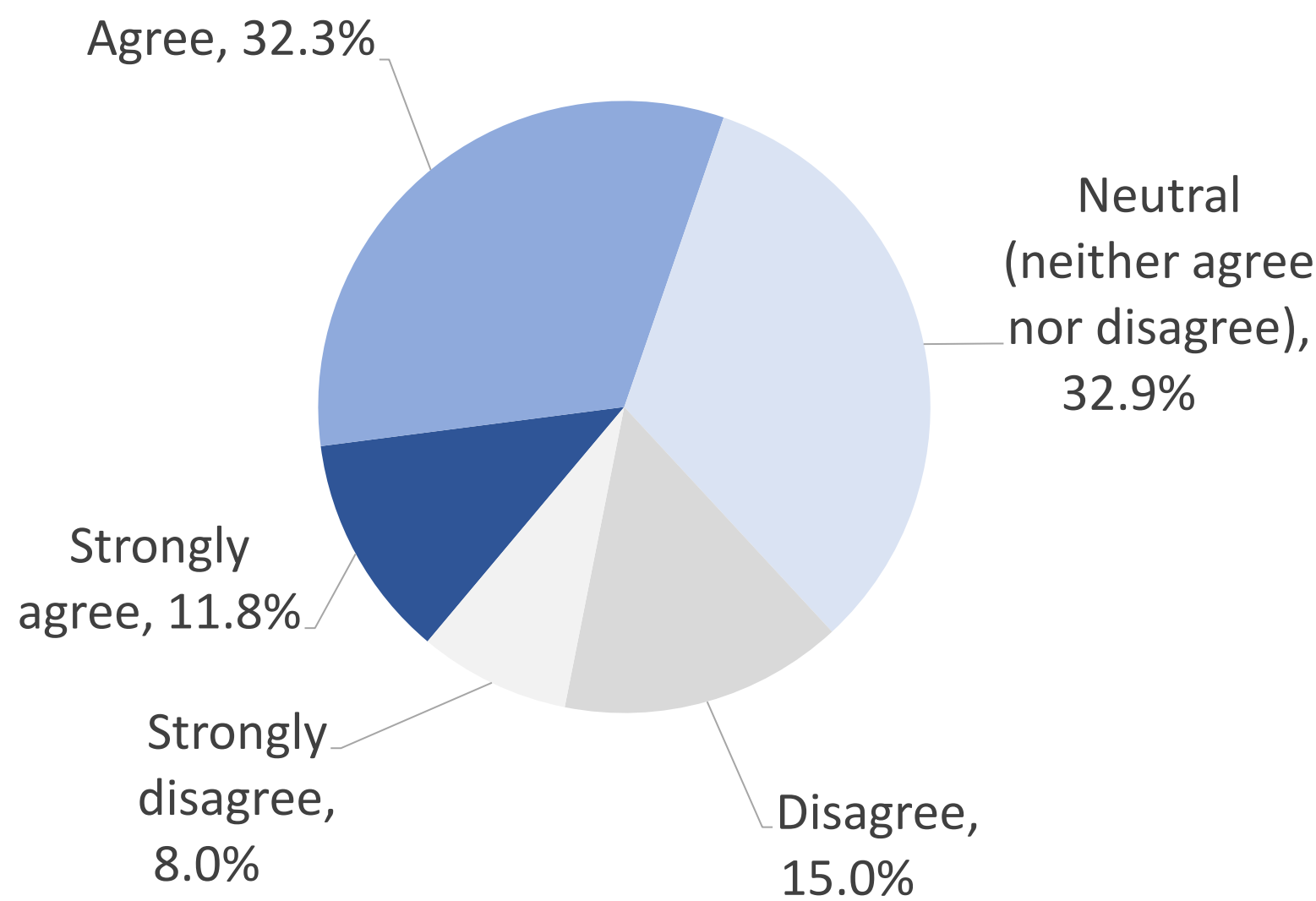
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Replacing Air Travel With Road Trips

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.

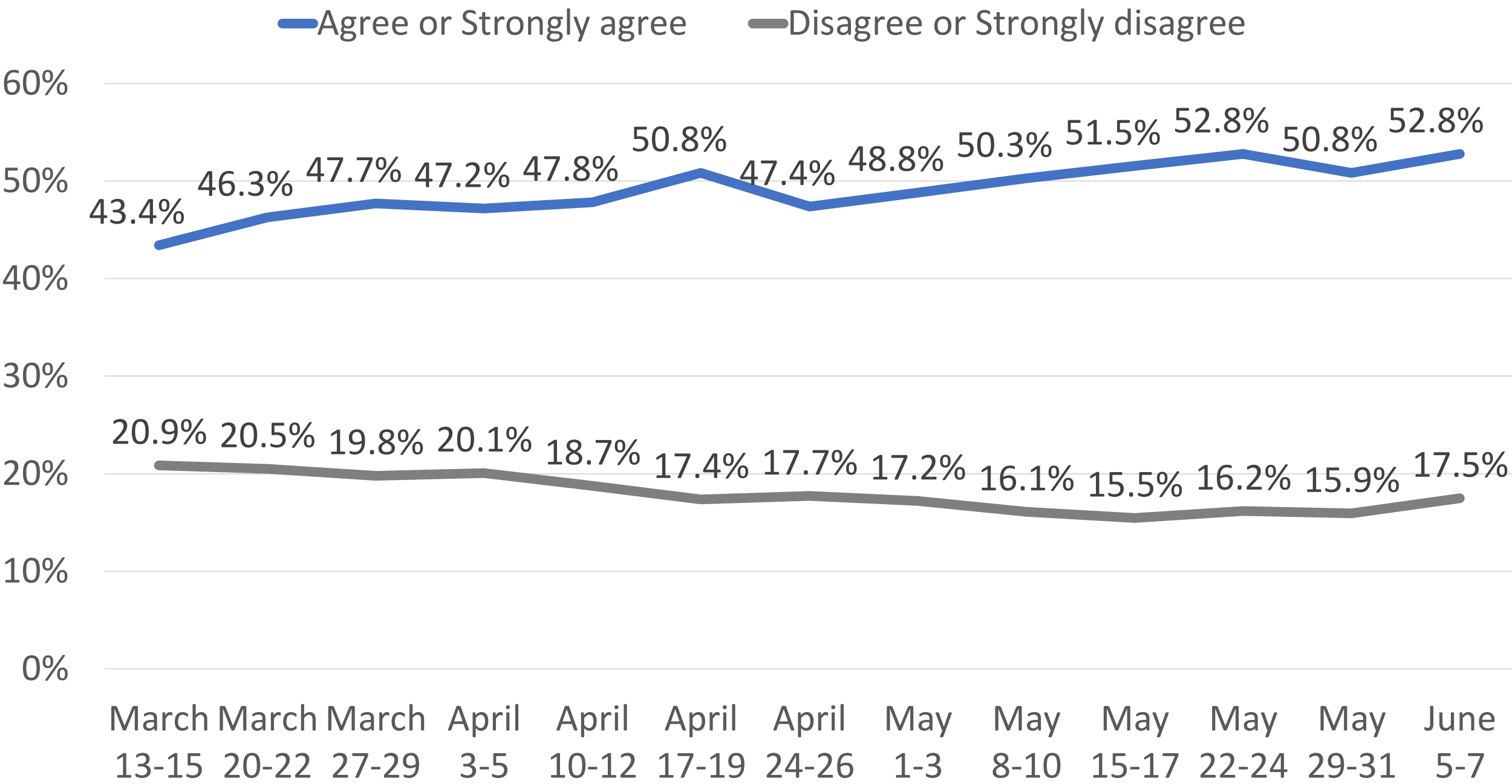
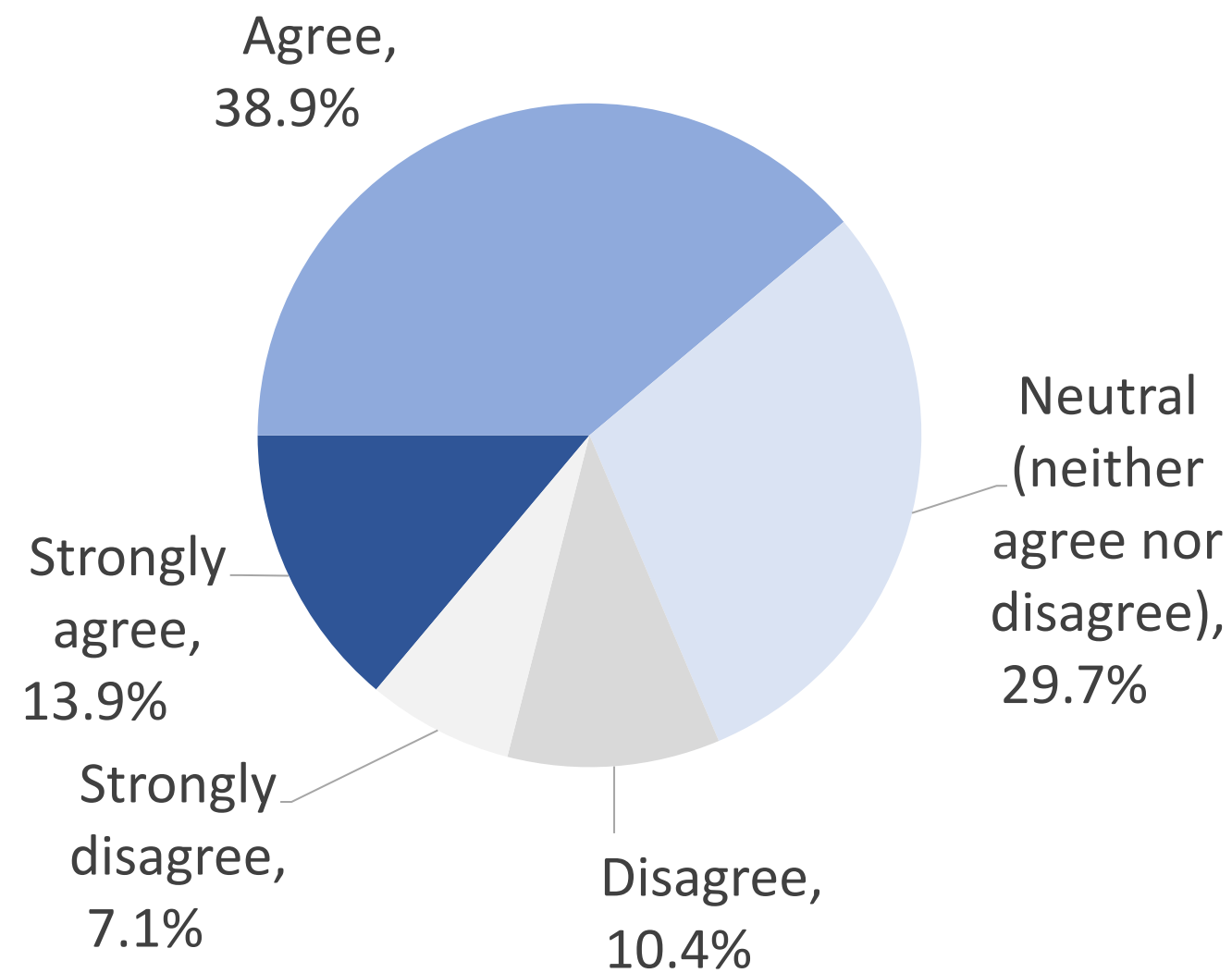


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Replacing Long-Haul Travel with Regional Trips

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).



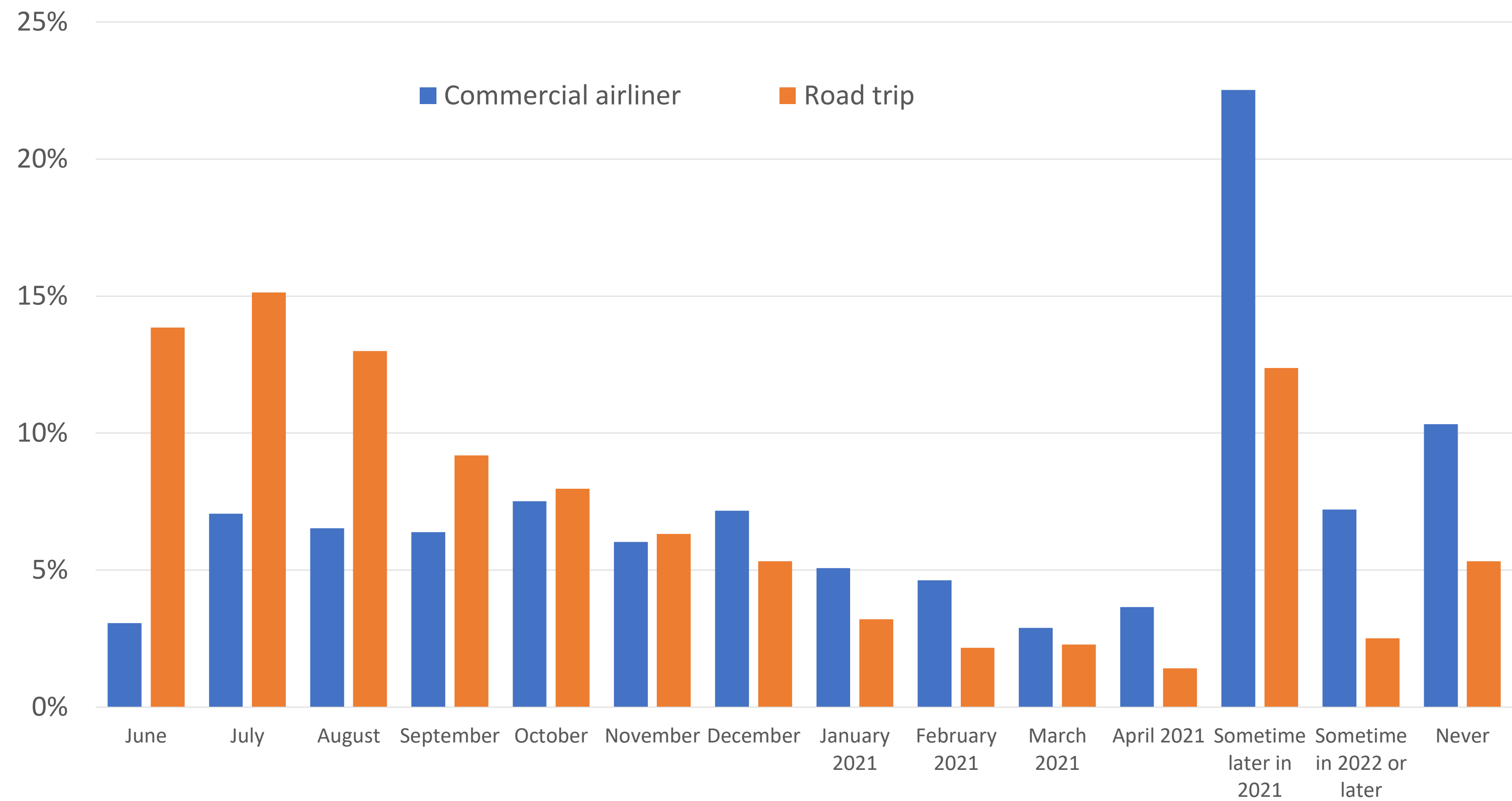
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Month of Next Road and Commercial Airline Trip

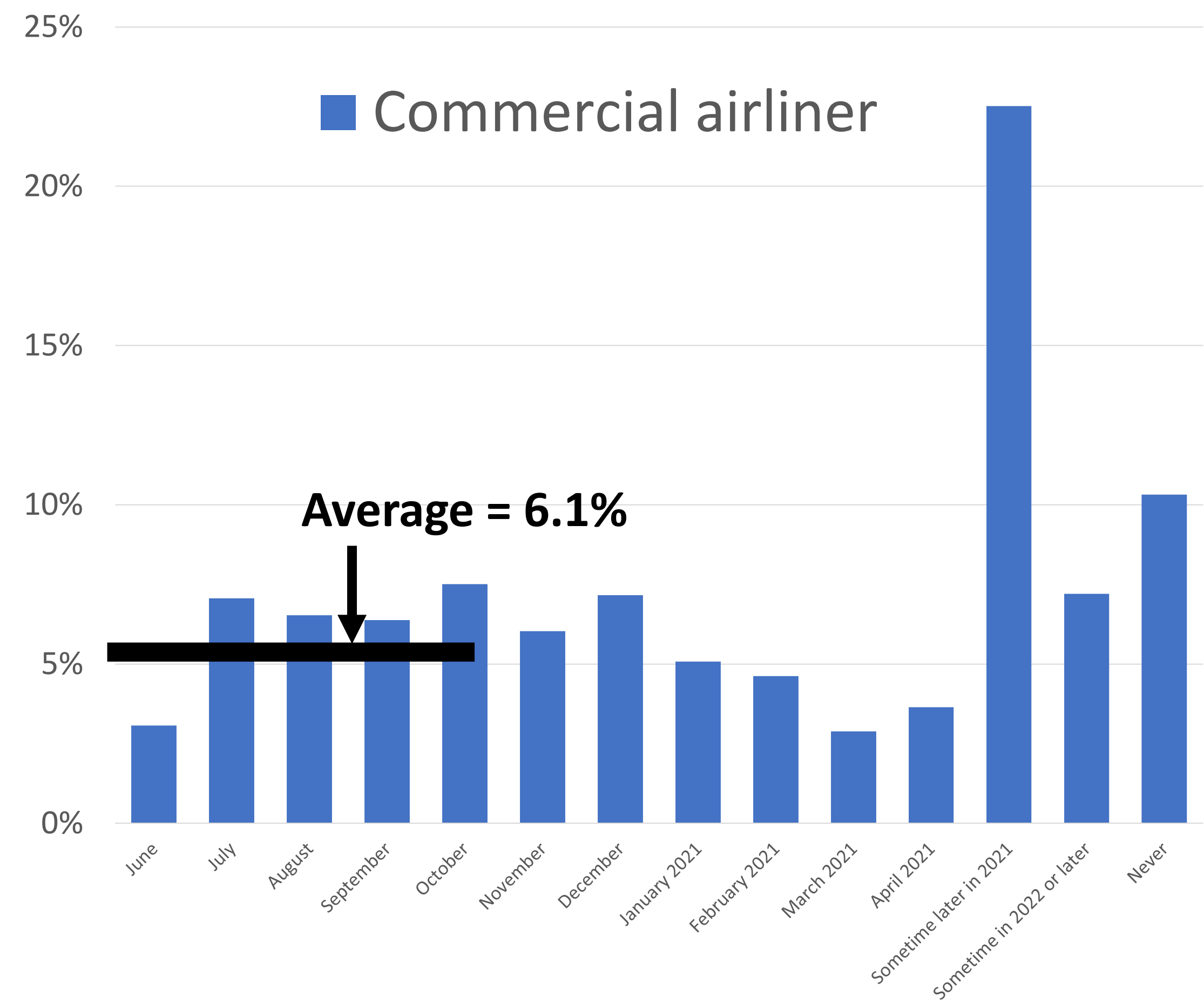
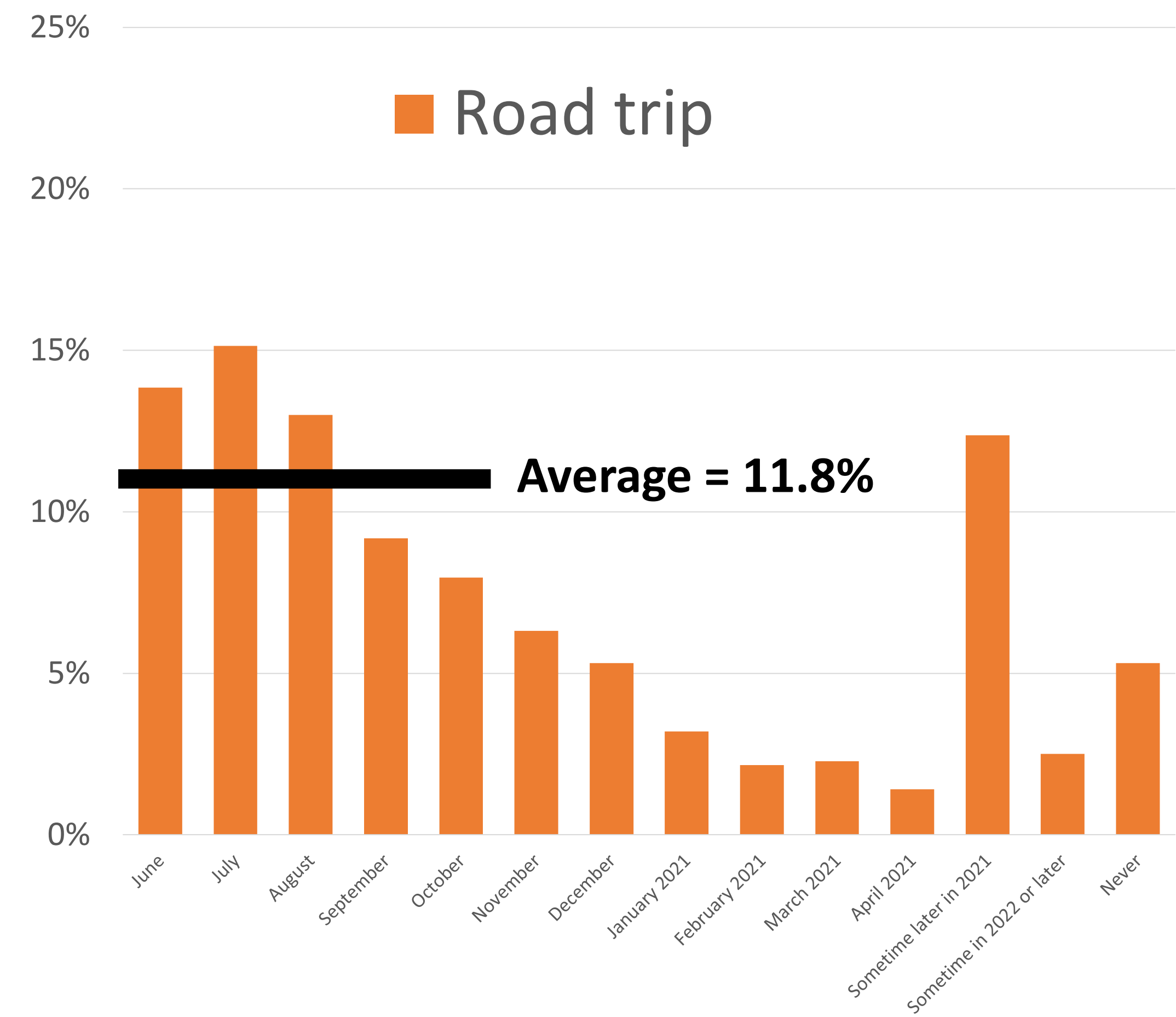
Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

(Base: Wave 13. All respondents, 1,214 completed surveys. Data collected June 7-9, 2020)



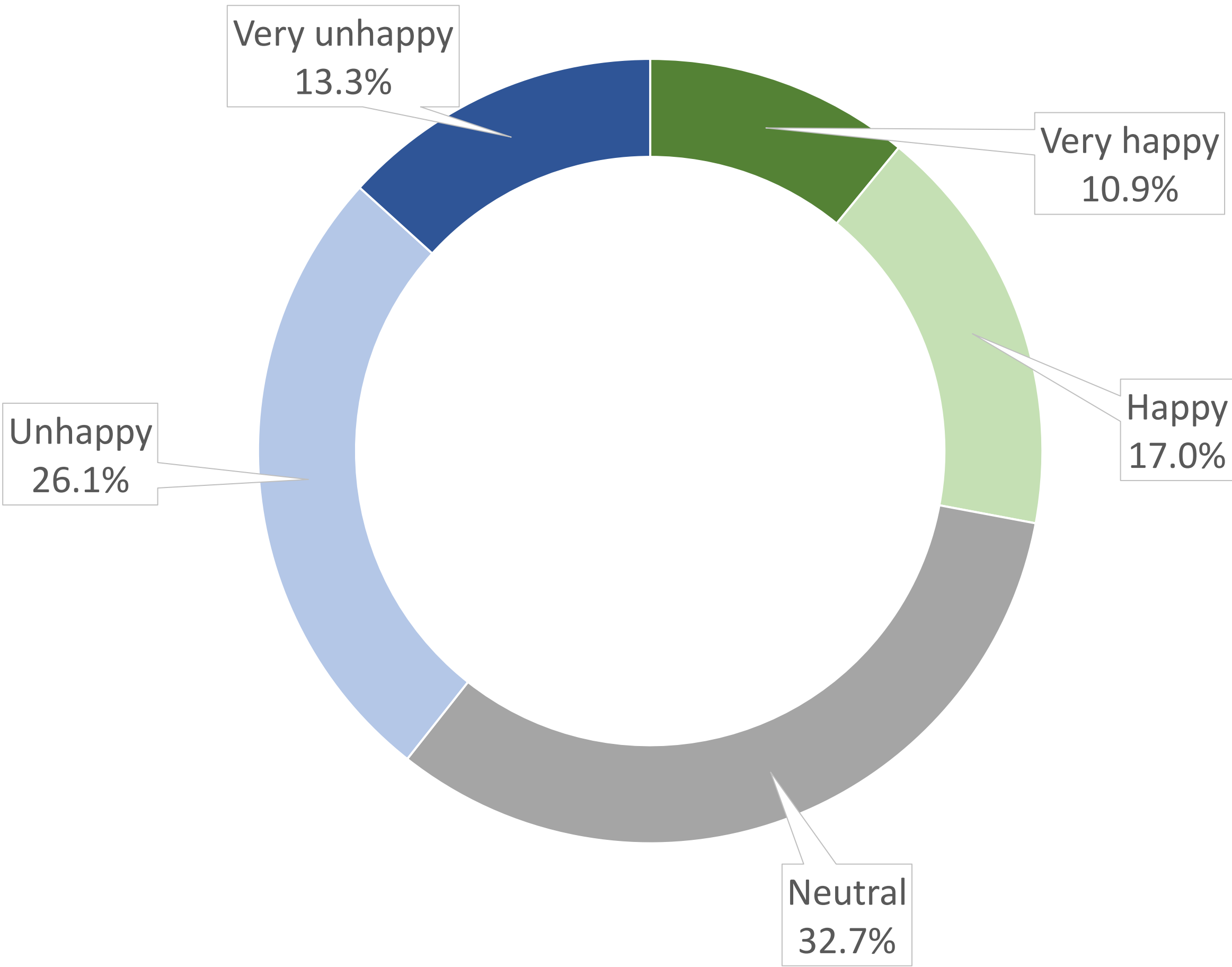
Road vs. Air: Deconstructed



Feelings About Friends/Family Traveling by Air in Current Environment

Question: How would you feel if a close friend or family member told you they had just purchased airline tickets for a trip some time in June?

(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)





KEY TAKEAWAYS

- **Increasing numbers of Americans report they are already traveling or ready to travel**
- **Over 70 percent will take at least one leisure trip in the remainder of 2020**
- **Half expect to be traveling in the Fall**
- **Lessening numbers expect to staycation and avoid international travel**
- **The majority of Americans still exhibit some hesitation around air travel, largely putting it off until later and opting for road trips this summer**

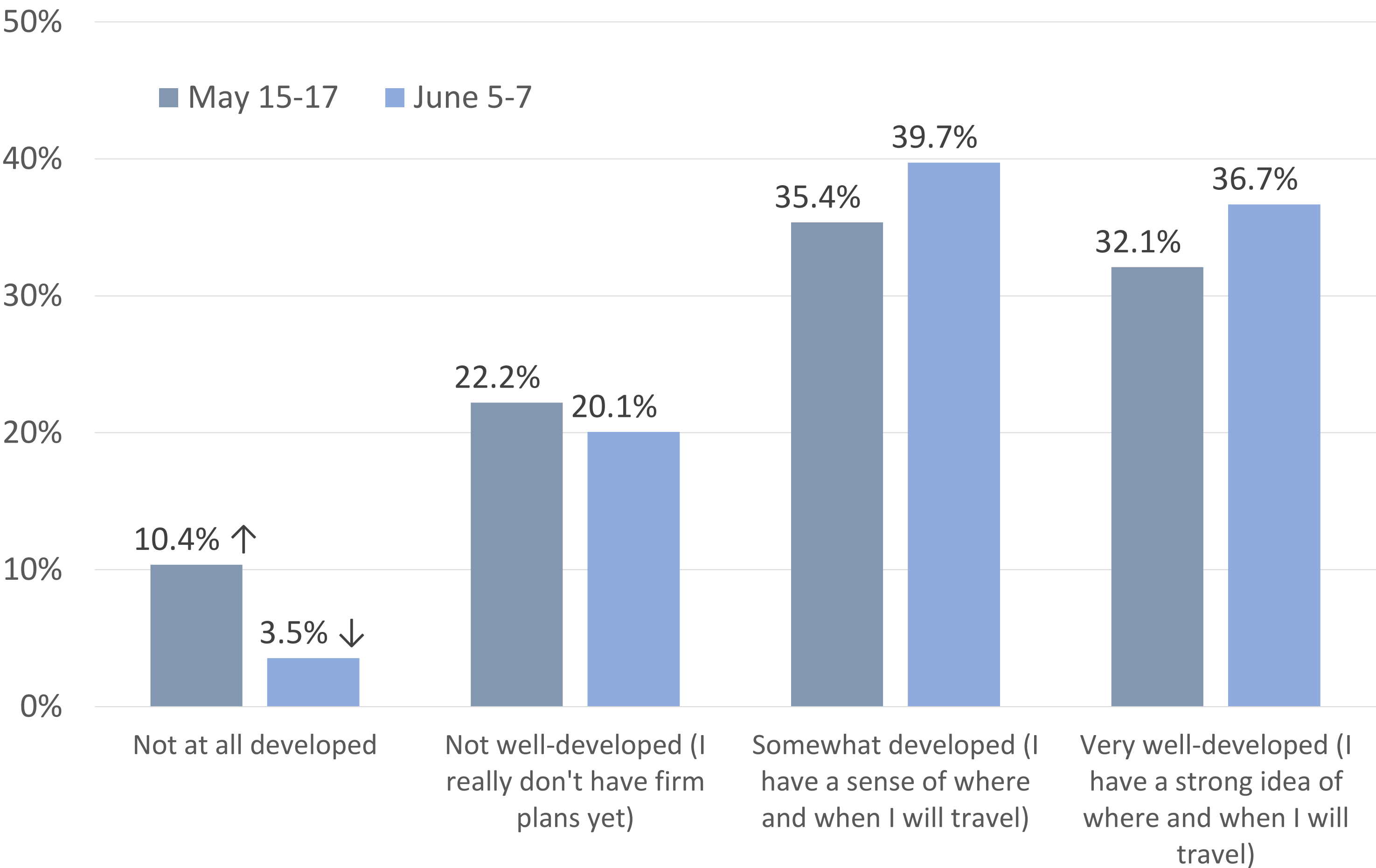
Profile of Americans' Next Leisure Trips



How Well-developed is Their Trip Plan?

Question: Right now, which best describes HOW WELL-DEVELOPED the idea of this next leisure trip is in your mind? (Select one)

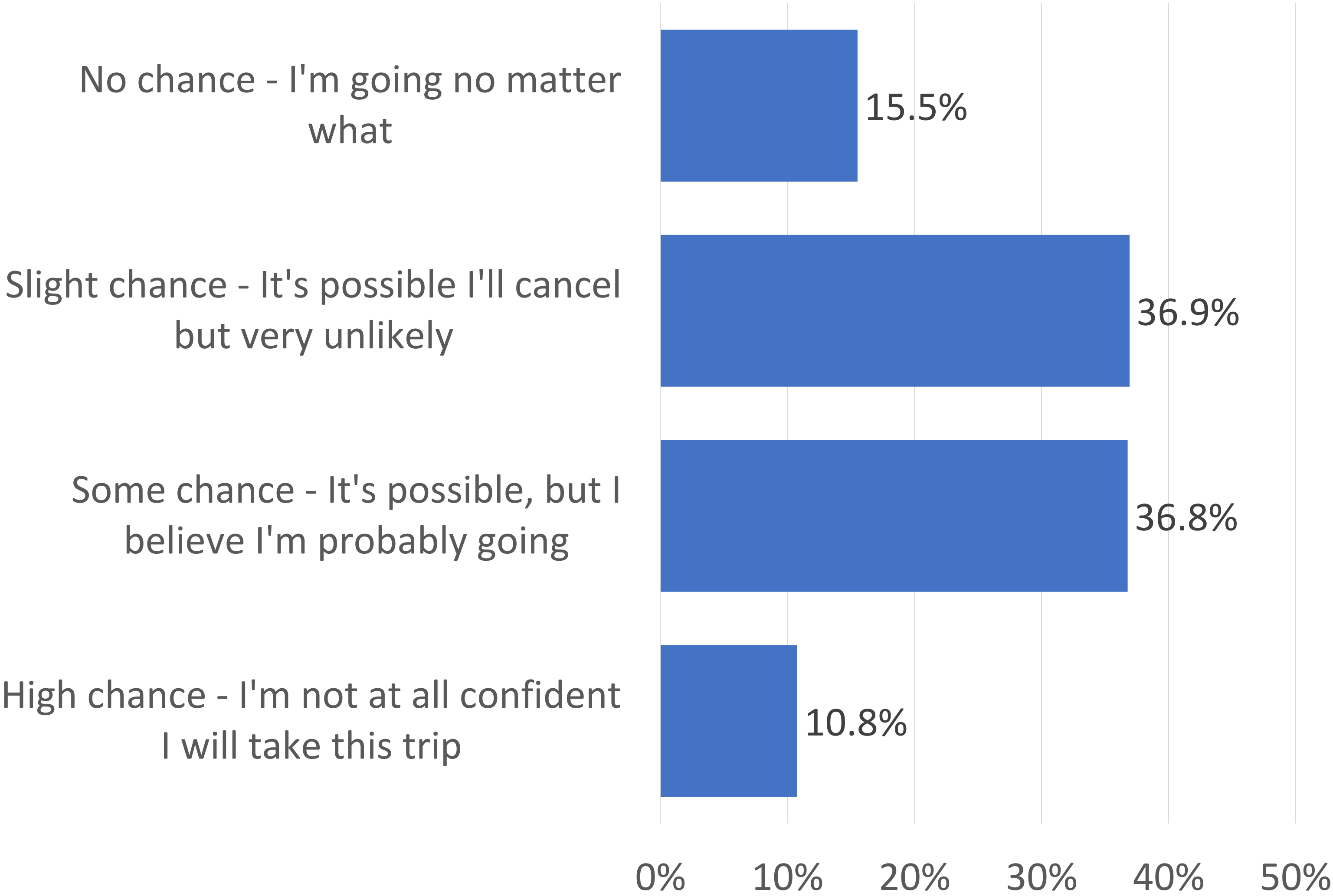
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Opinions on Trip Cancellations

Question: What are the chances that you still might cancel this next leisure trip due to the Coronavirus situation?

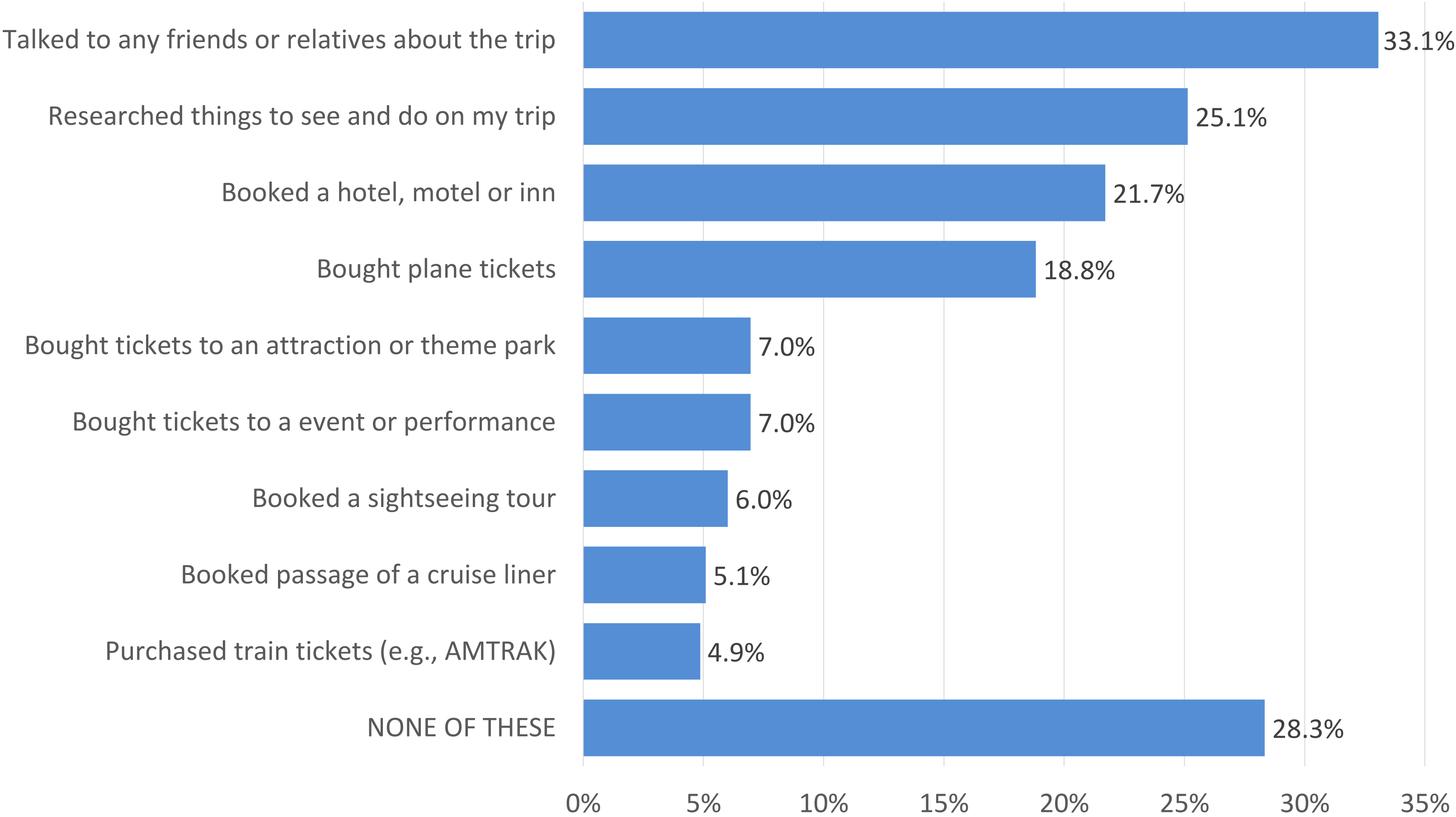
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Trip Preparations Already Completed

Question: Have you already done any of the following in preparation for your NEXT LEISURE TRIP?

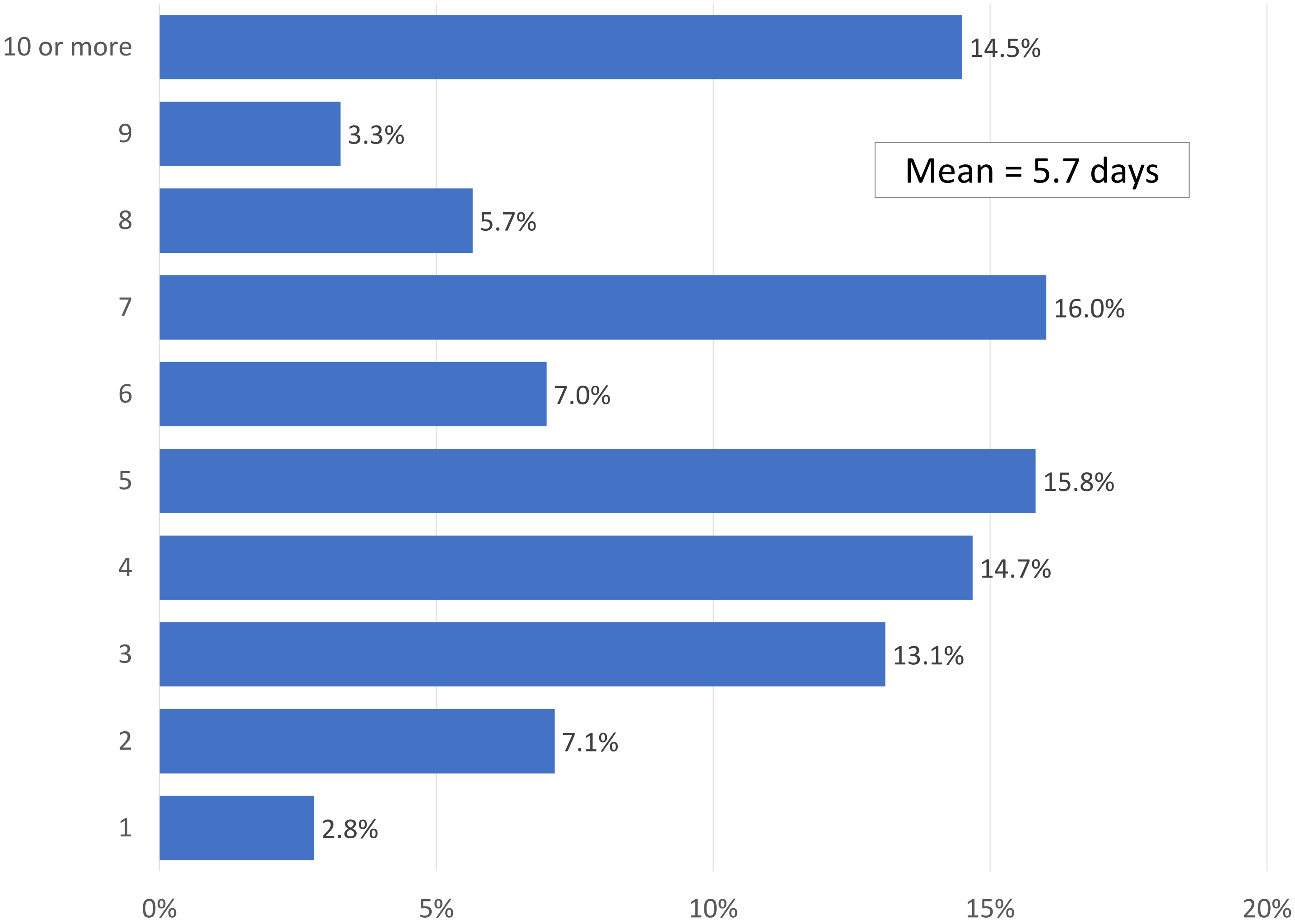
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Expected Length of Trip

Question: How many days away from home will you spend on this trip?
(Select one)

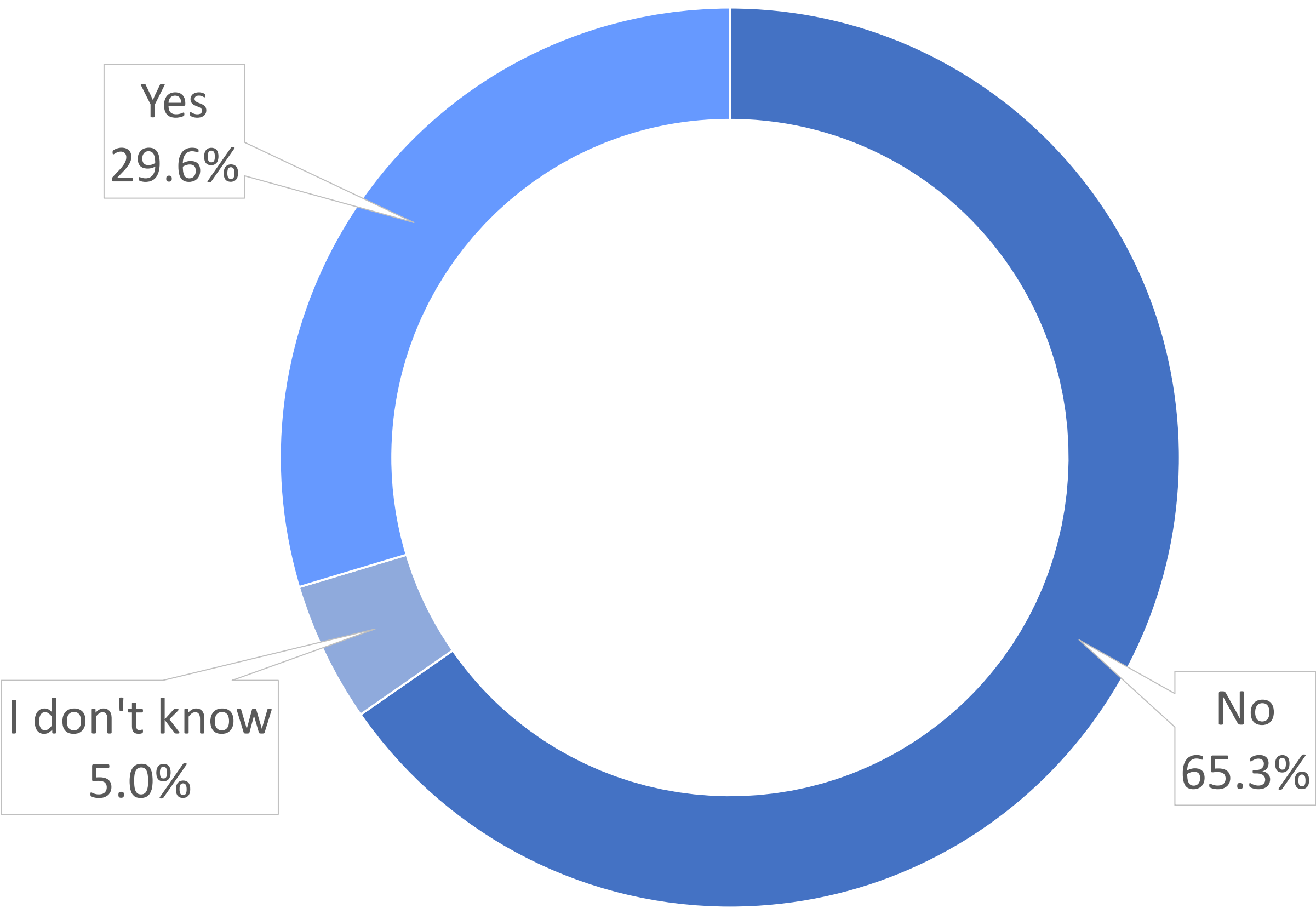
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Expanding Social Networks for Travel

Question: Will there be anyone in your travel party who does not currently live in your household?

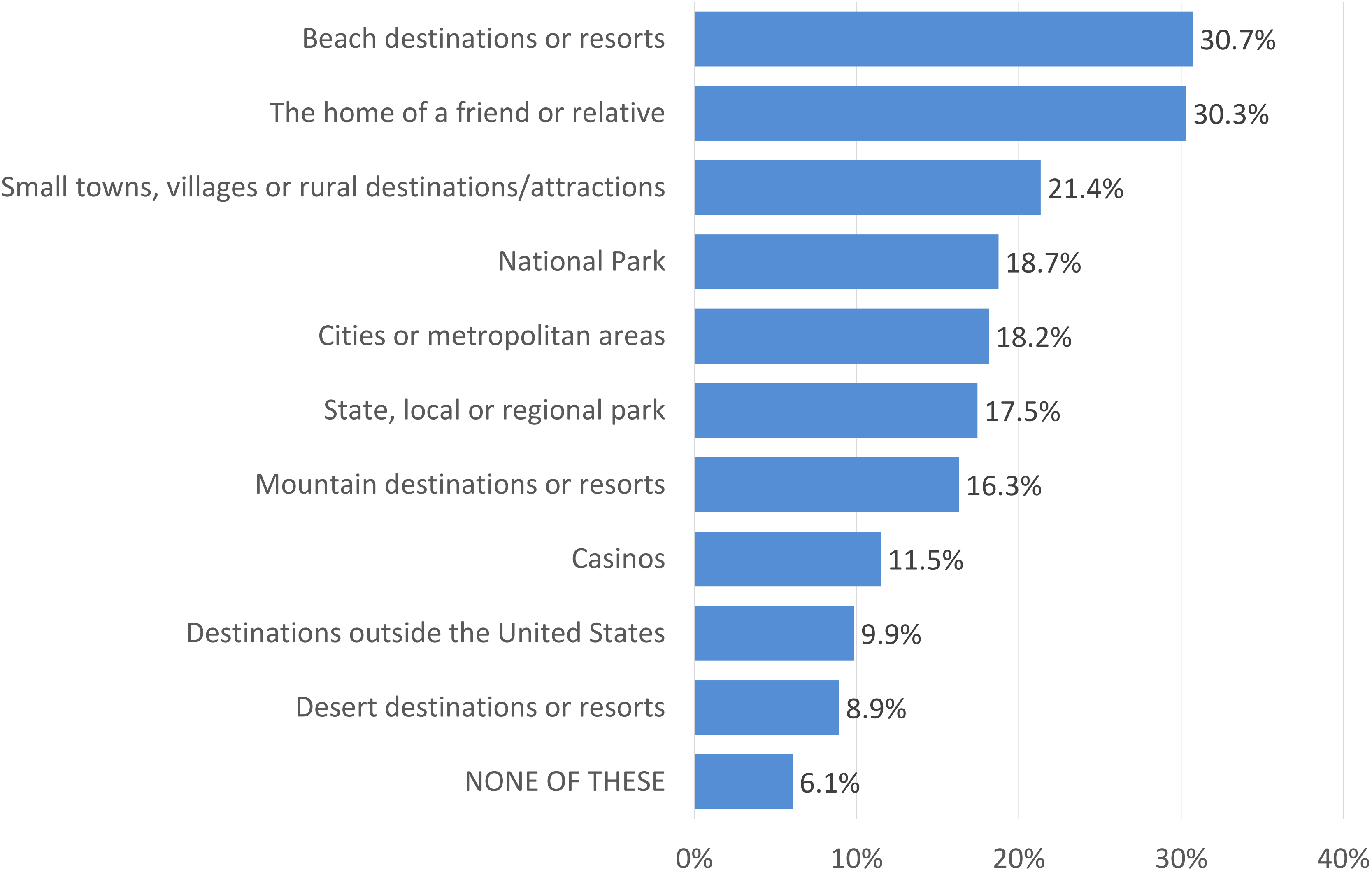
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Destination Types

Question: Which of the following will you be likely to visit on your NEXT LEISURE TRIP? (Select all that apply)

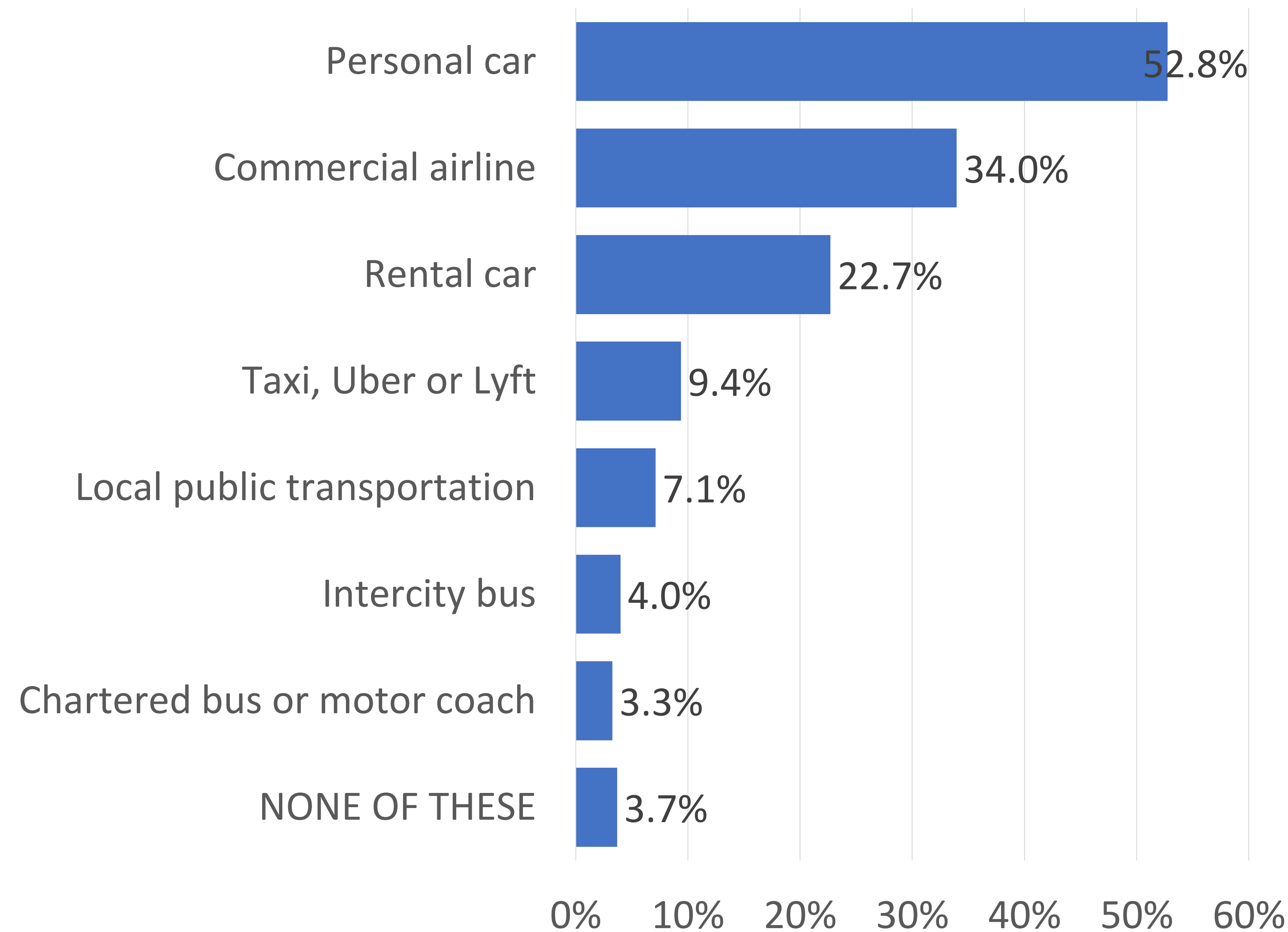
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Modes of Transportation Used

Question: Which modes of transportation are you likely to use of this trip?

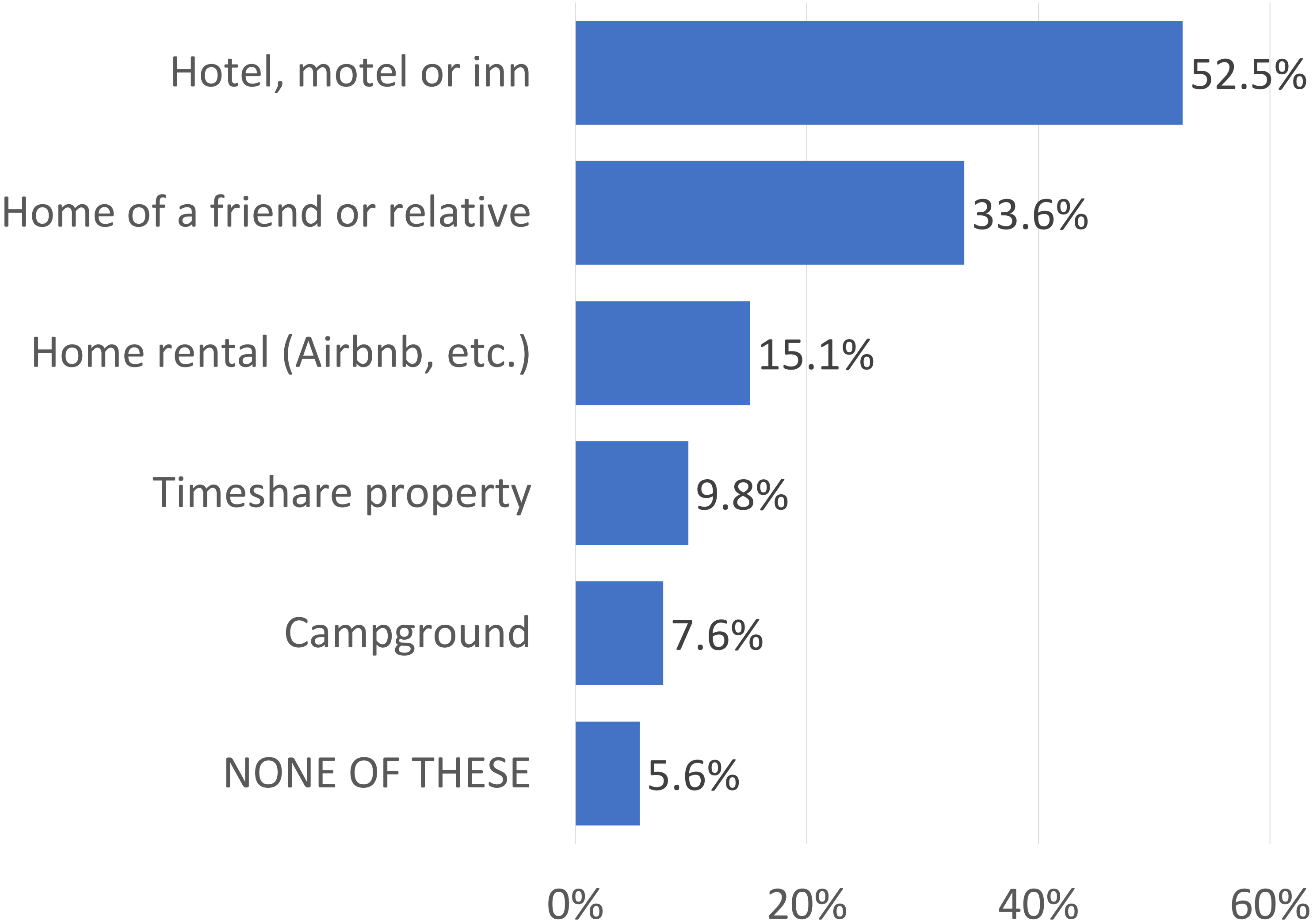
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Place of Stay

Question: Where are you likely to stay overnight on this trip?

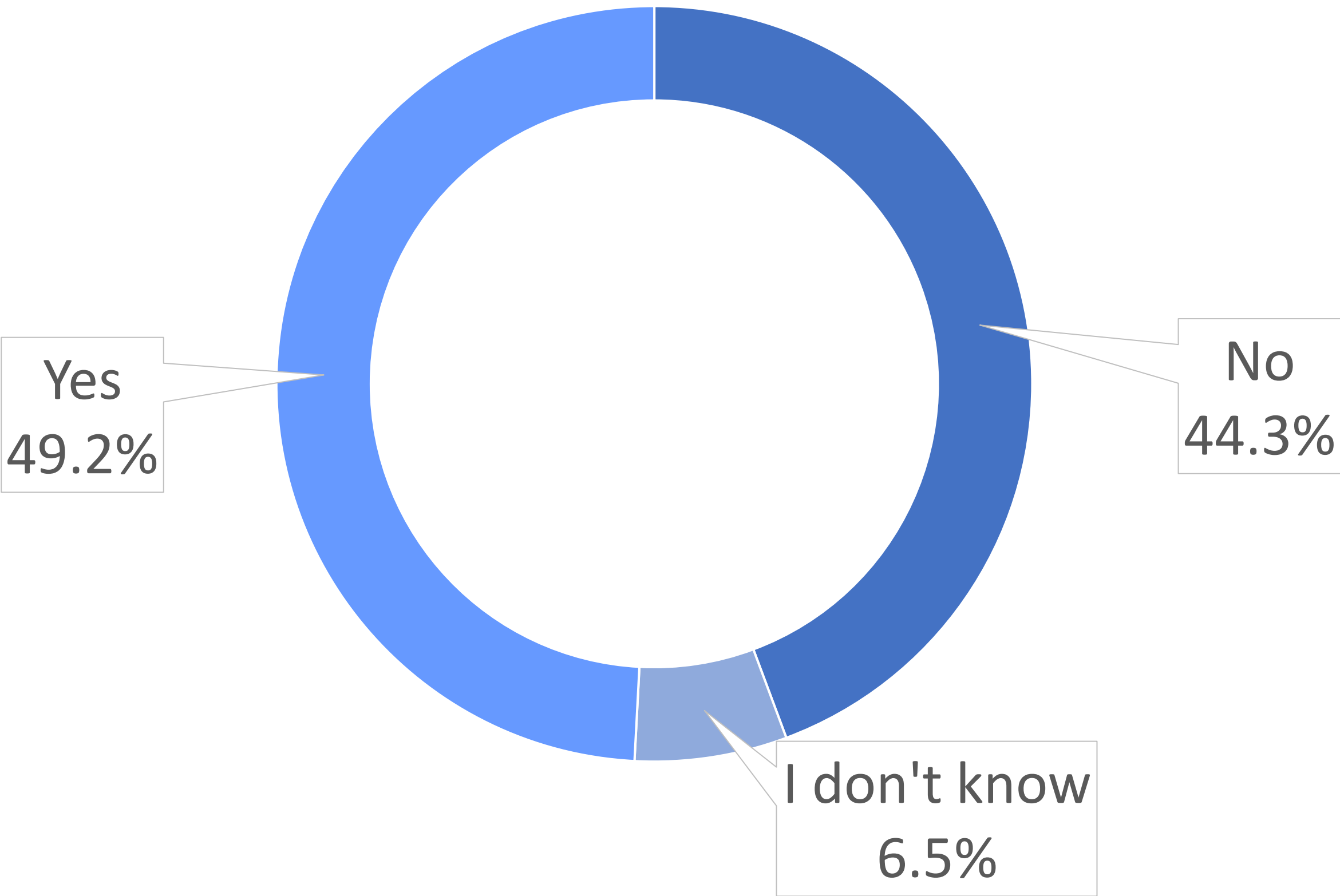
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Role of Personal Safety in Destination Selection

Question: Did your personal safety (or that of your travel party) play any role in SELECTING THE DESTINATION(S) YOU WILL VISIT on this next leisure trip?

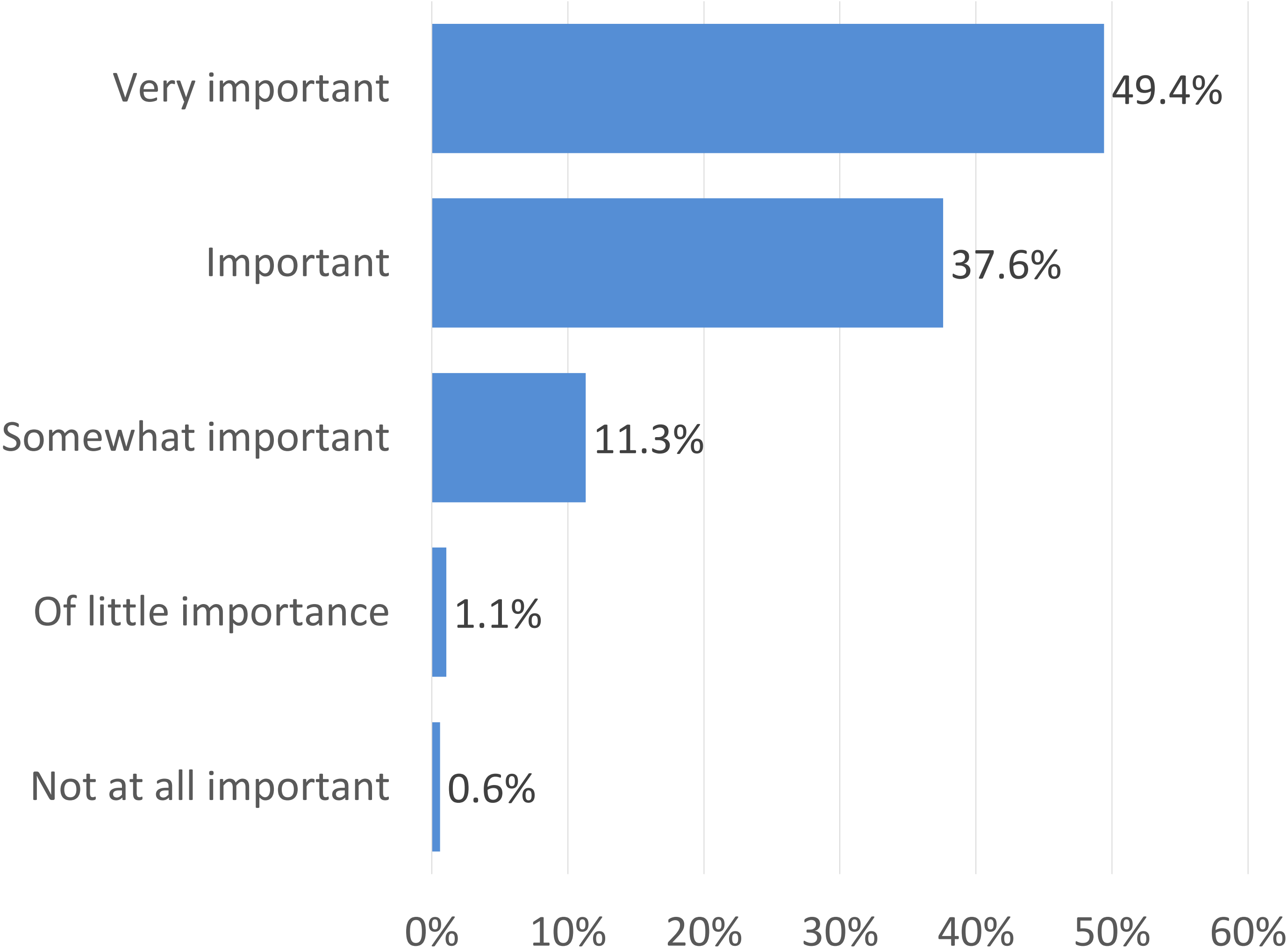
(Base: Respondents with a trip at least tentatively planned in 202, 853 completed surveys. Data collected June 5-7, 2020)



Importance of Personal Safety in Destination Selection

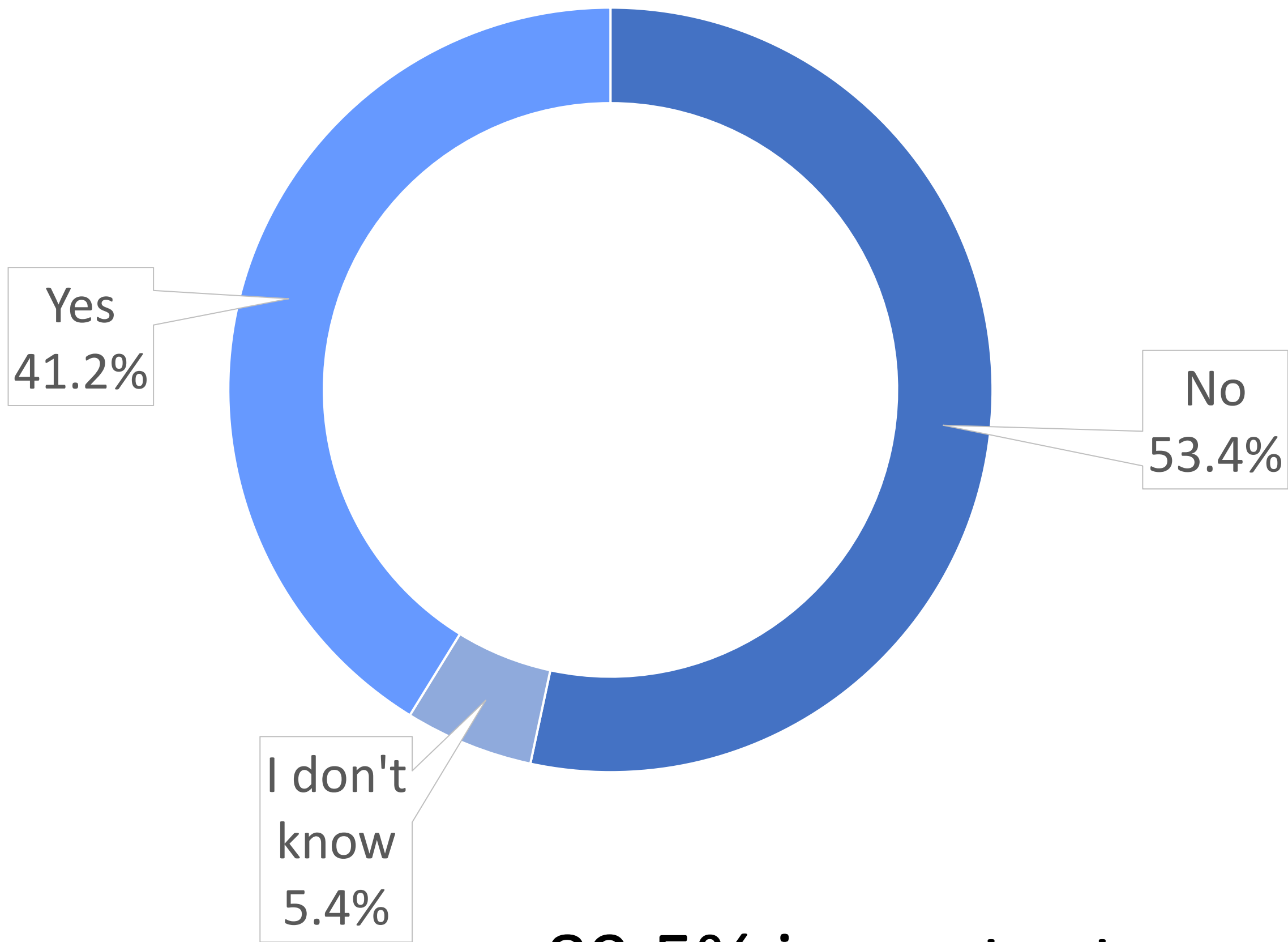
Question: How important was your personal safety (or that of your travel party) in **SELECTING THE DESTINATION(S) YOU WILL VISIT** on this next leisure trip?

(Base: Respondents saying personal safety played a role in destination selection, 418 completed surveys. Data collected June 5-7, 2020)



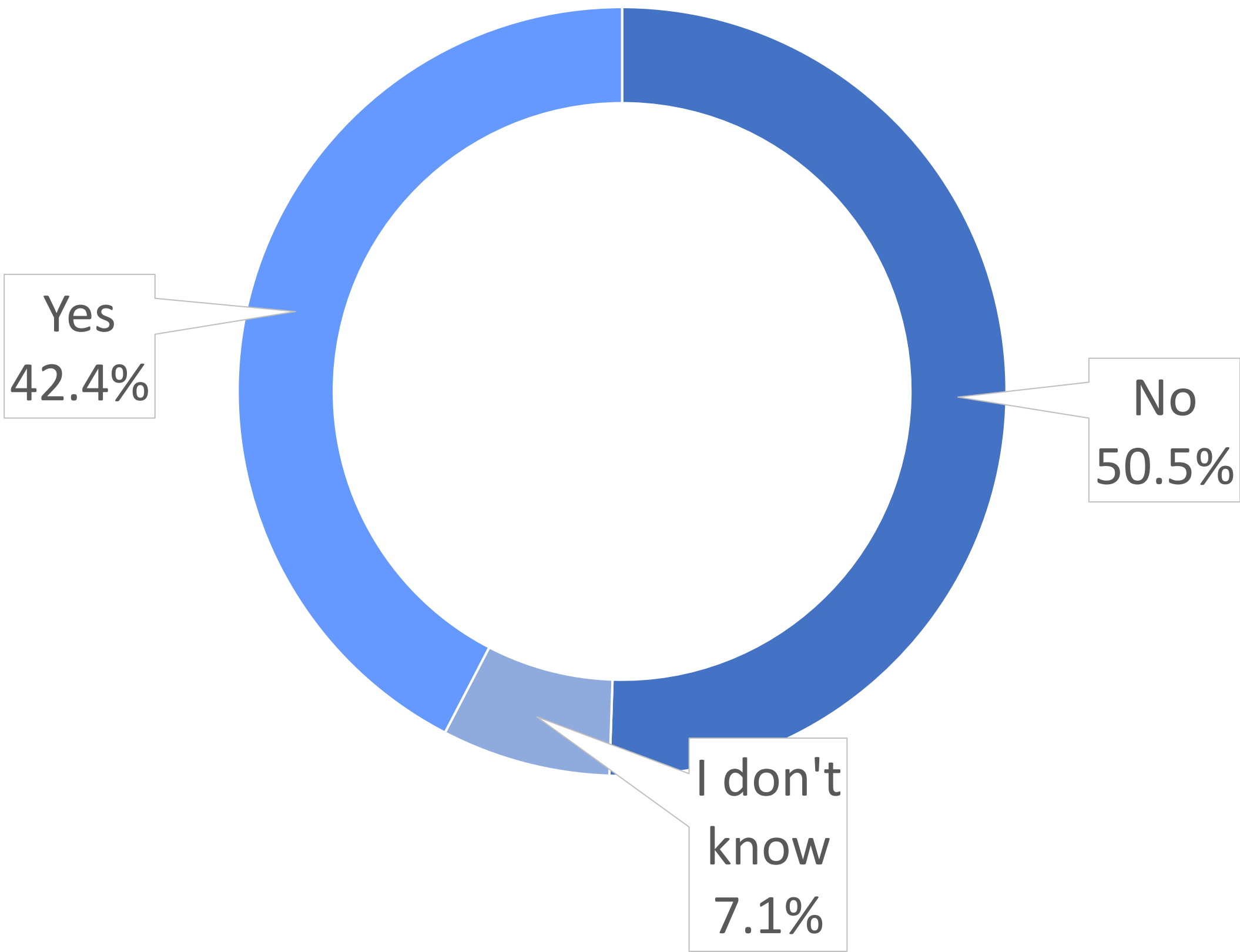
Role of Personal Safety in Transportation Mode Selection

Question: Did your personal safety (or that of your travel party) play any role in selecting the **MODES OF TRANSPORTATION** you will use on this next leisure trip?



89.5% important

Question: Did your personal safety (or that of your travel party) play any role in selecting the **ACCOMMODATIONS** you will use on this next leisure trip?

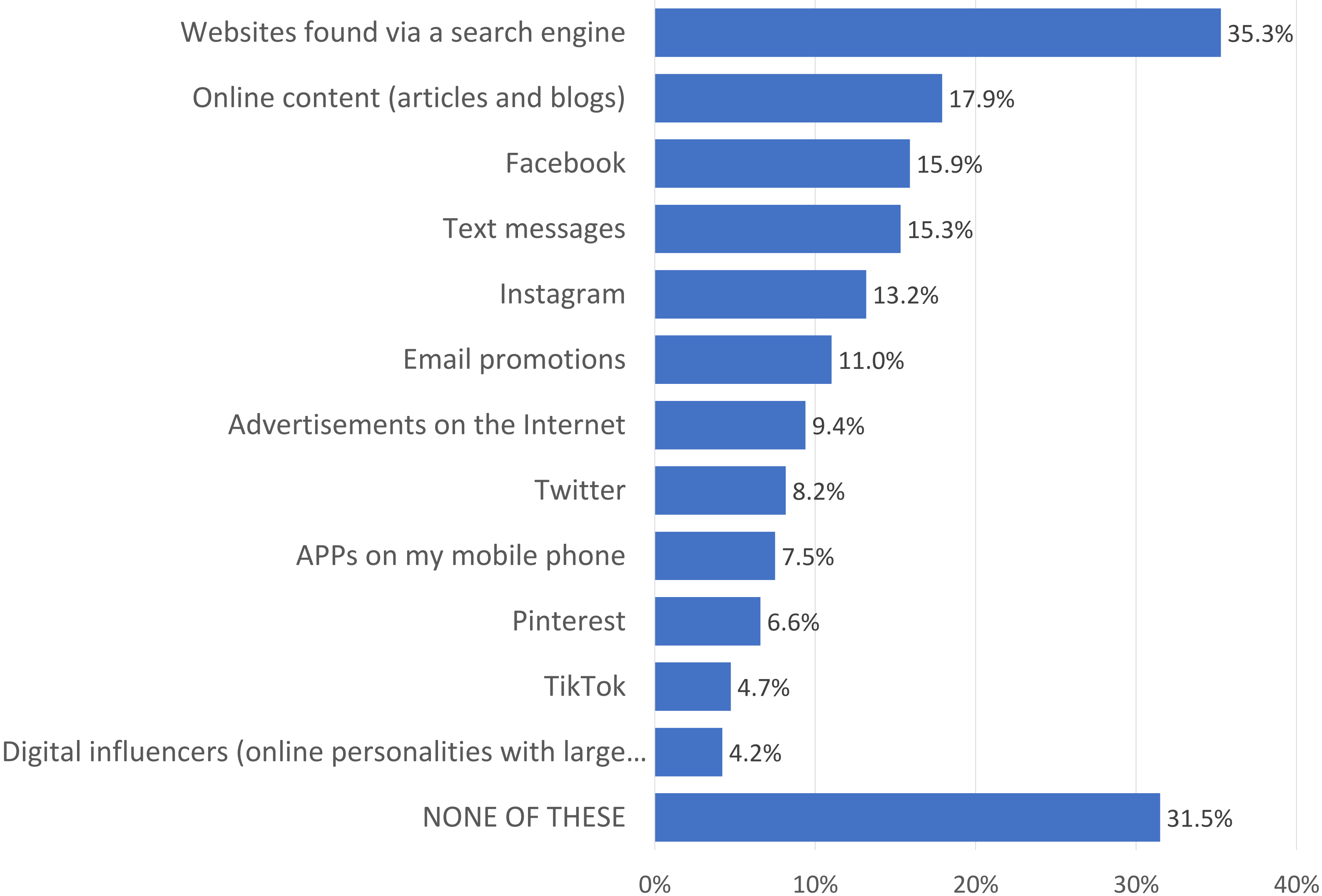


89.0% important

Planning Resources Used

Question: Please think about the planning you have done (or will do) for this upcoming trip. Which of these have you used (or will you use) to gather information for this trip? (Please select all that apply)

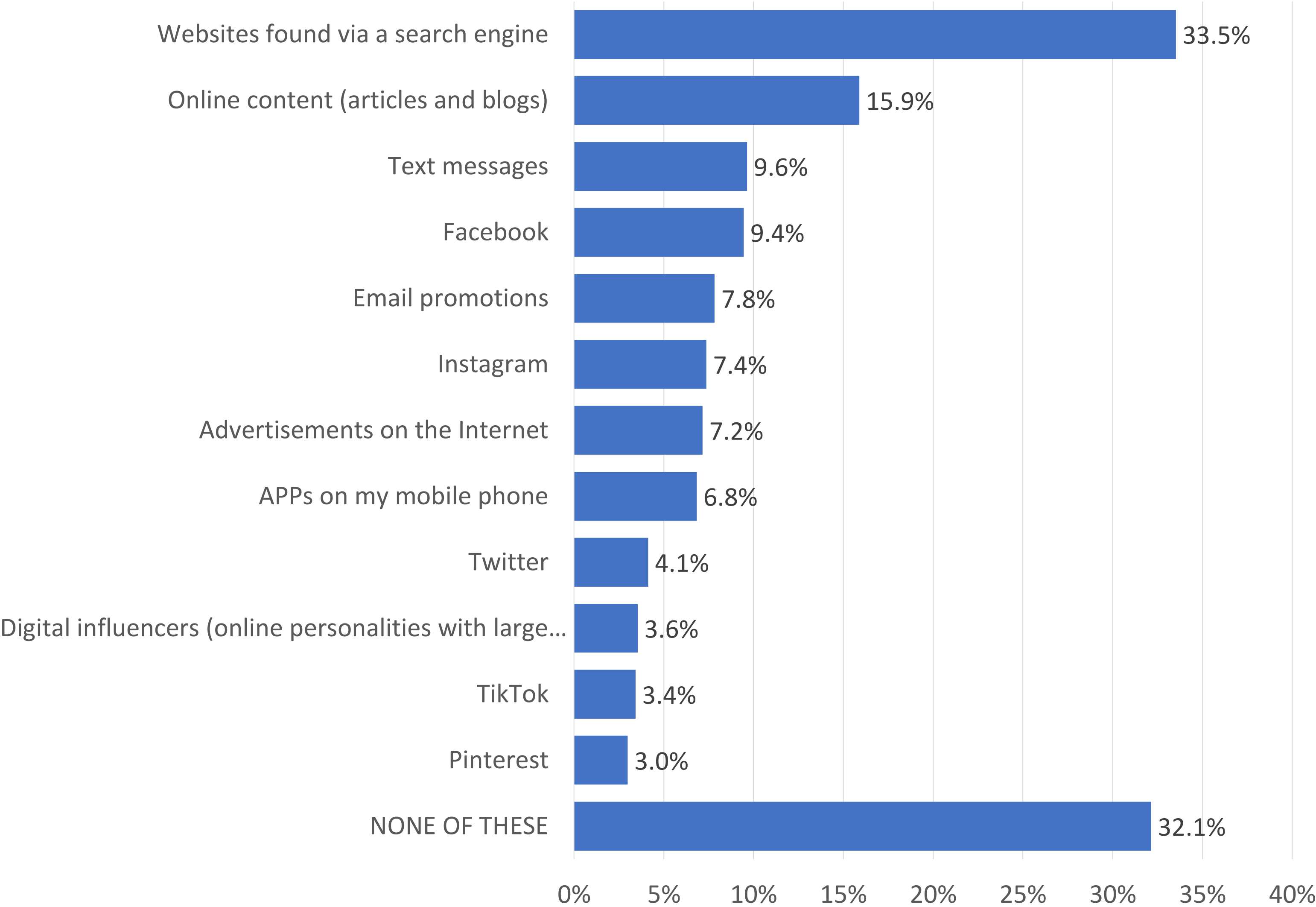
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Most Important Planning Resources

Question: Which do you expect to be **MOST IMPORTANT** in your travel planning? (Select as many as three)

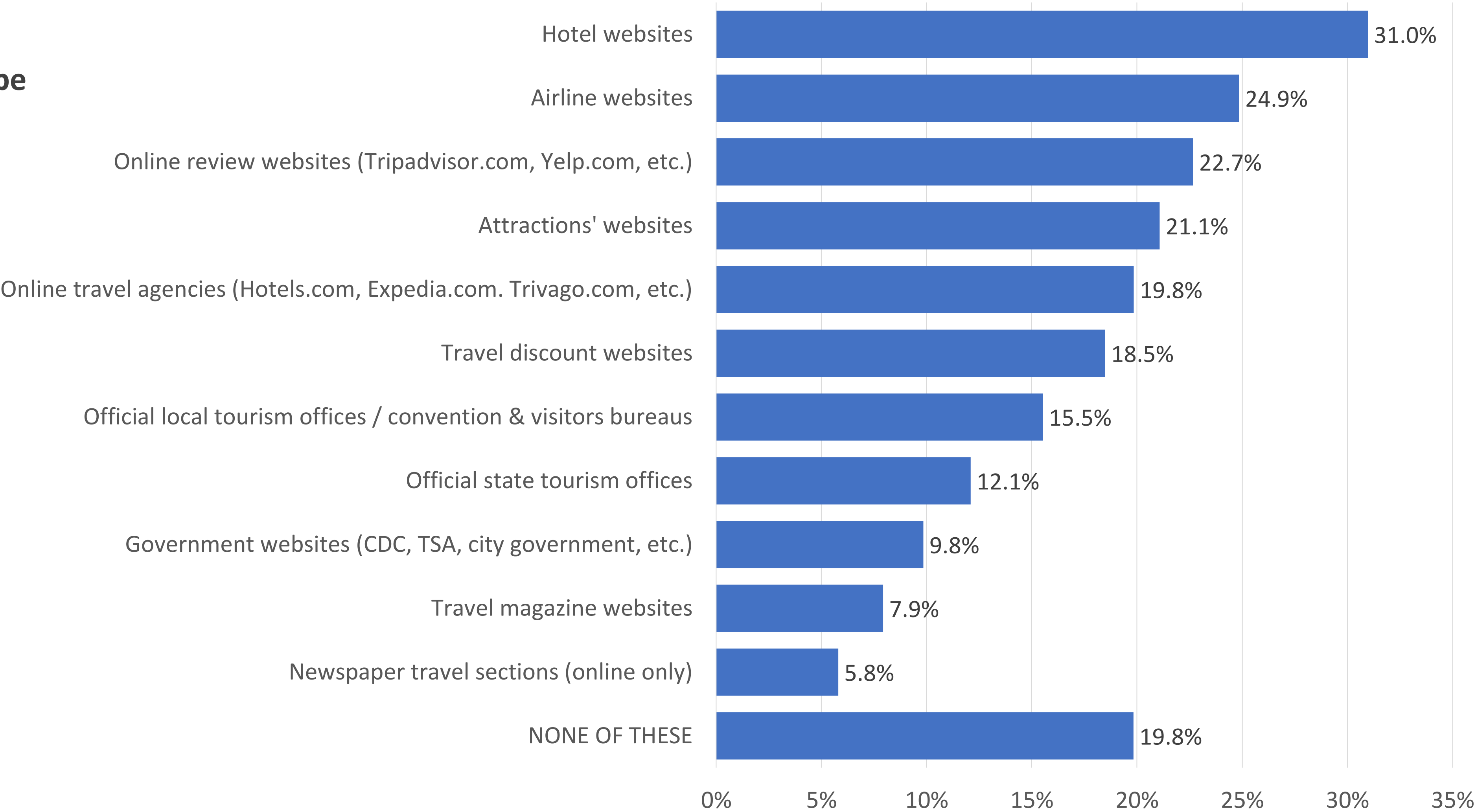
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



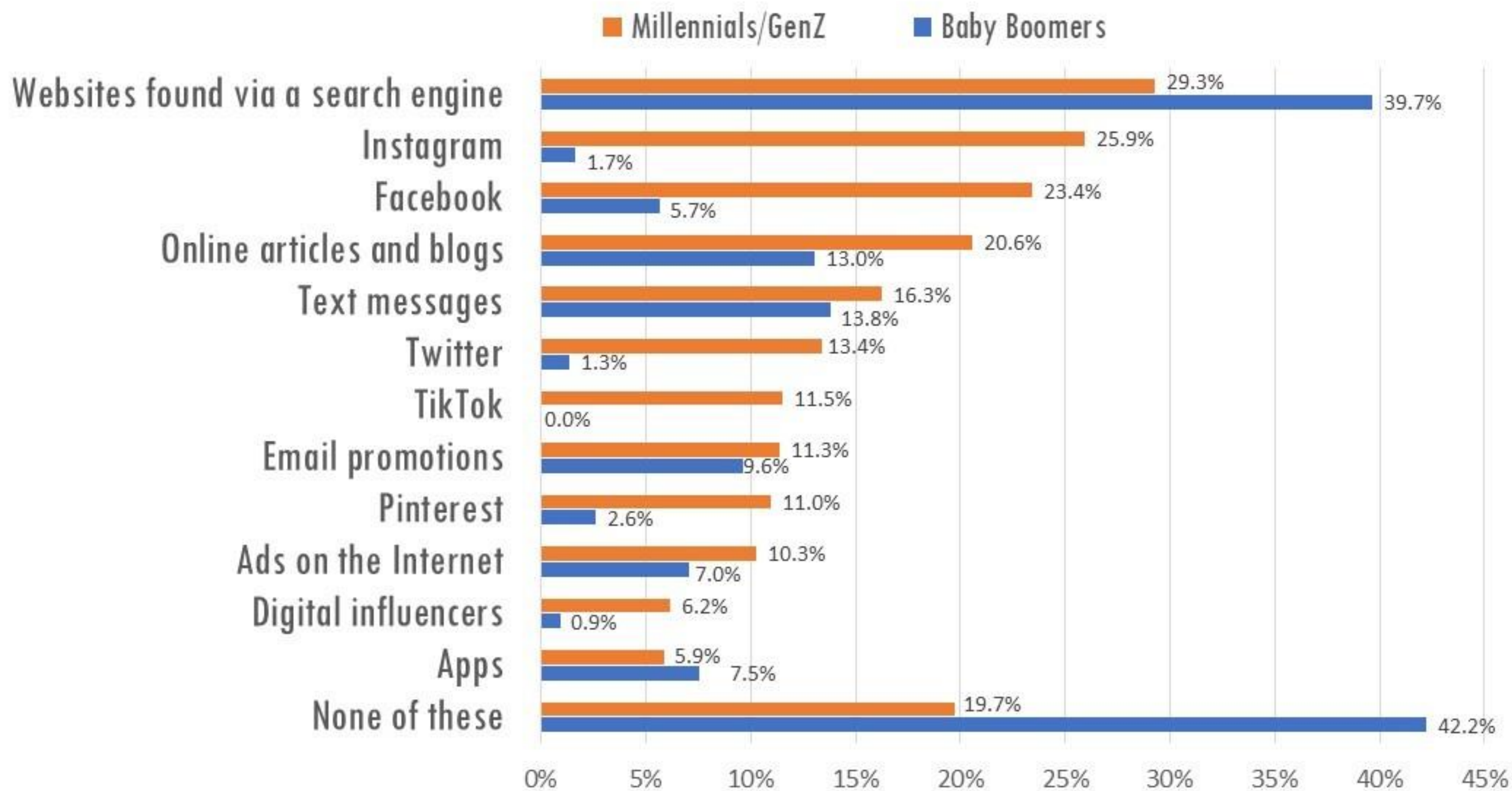
Online Resources Used

Question: Which of these **ONLINE RESOURCES** will you be likely to use to plan this trip?

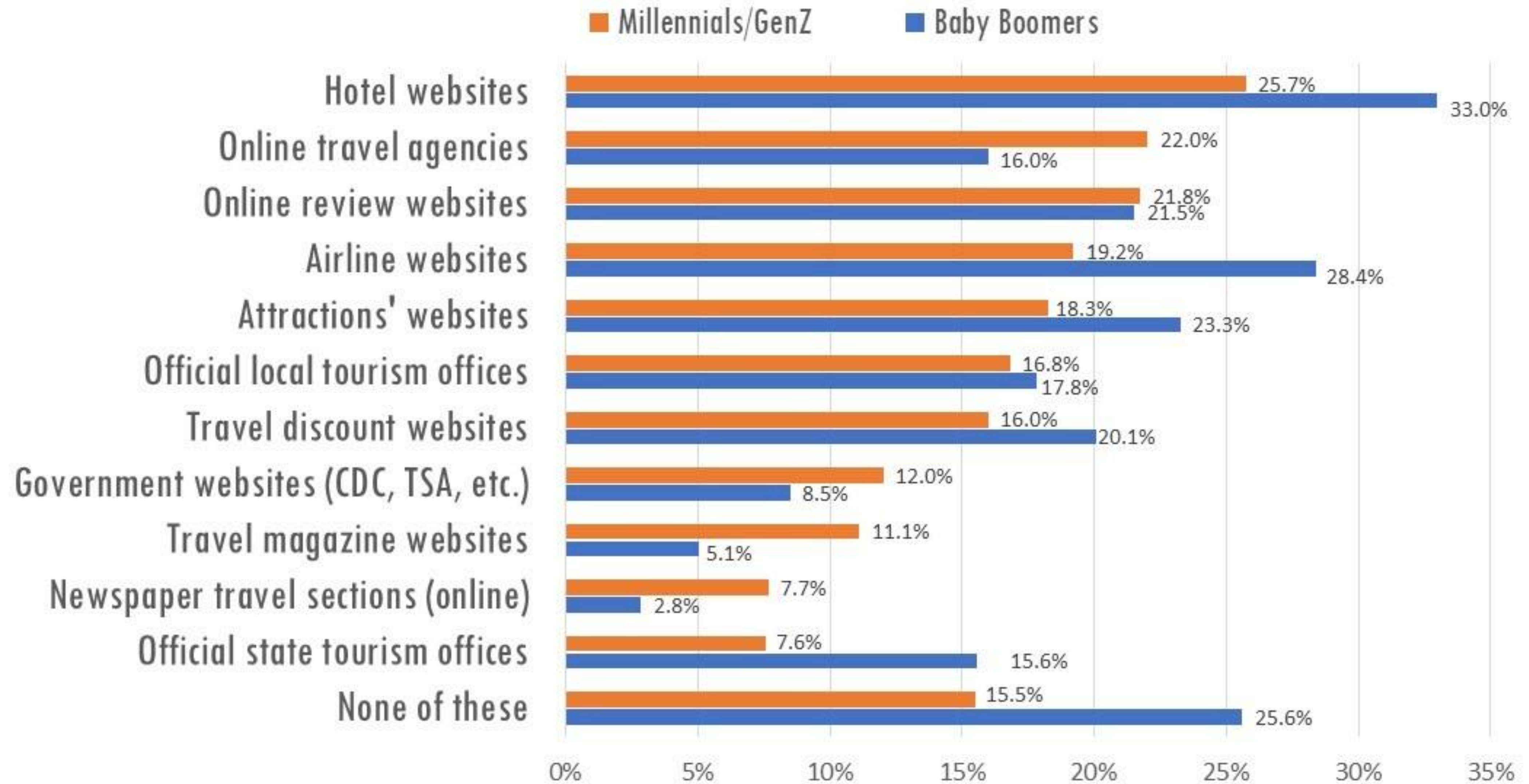
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



MEANS OF TRAVEL RESEARCH FOR NEXT LEISURE TRIP



ONLINE TRIP PLANNING RESOURCES FOR NEXT LEISURE TRIP



KEY TAKEAWAYS

- Most “next” trips expected this year have moved beyond the dreaming phase, with many travelers having their trip concepts substantially developed. Still, room for influence exists
- Personal safety considerations loom large, and will greatly impact destination selection, lodging choice and modes of transportation used
- American travelers continue to opt for beach, and outdoor type experiences for their next leisure trips
- Travel-related websites and social media will likely be the focus of travel decision-making in the coming months



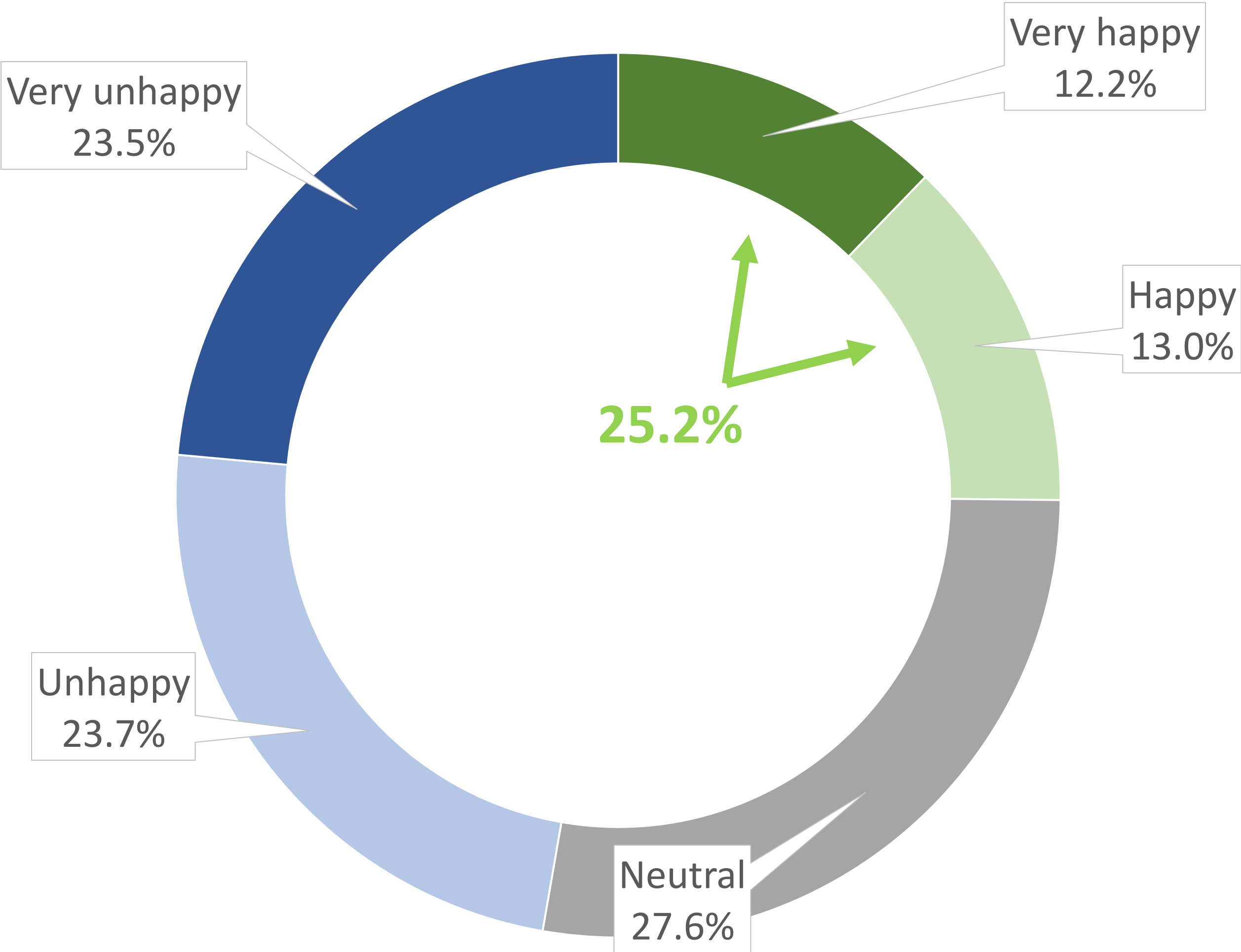


The Return of Business + Convention Travel

Feelings About Being Asked to Take a Business Trip

Question: How would you feel if your employer needed you to take an out-of-state business trip some time in July?

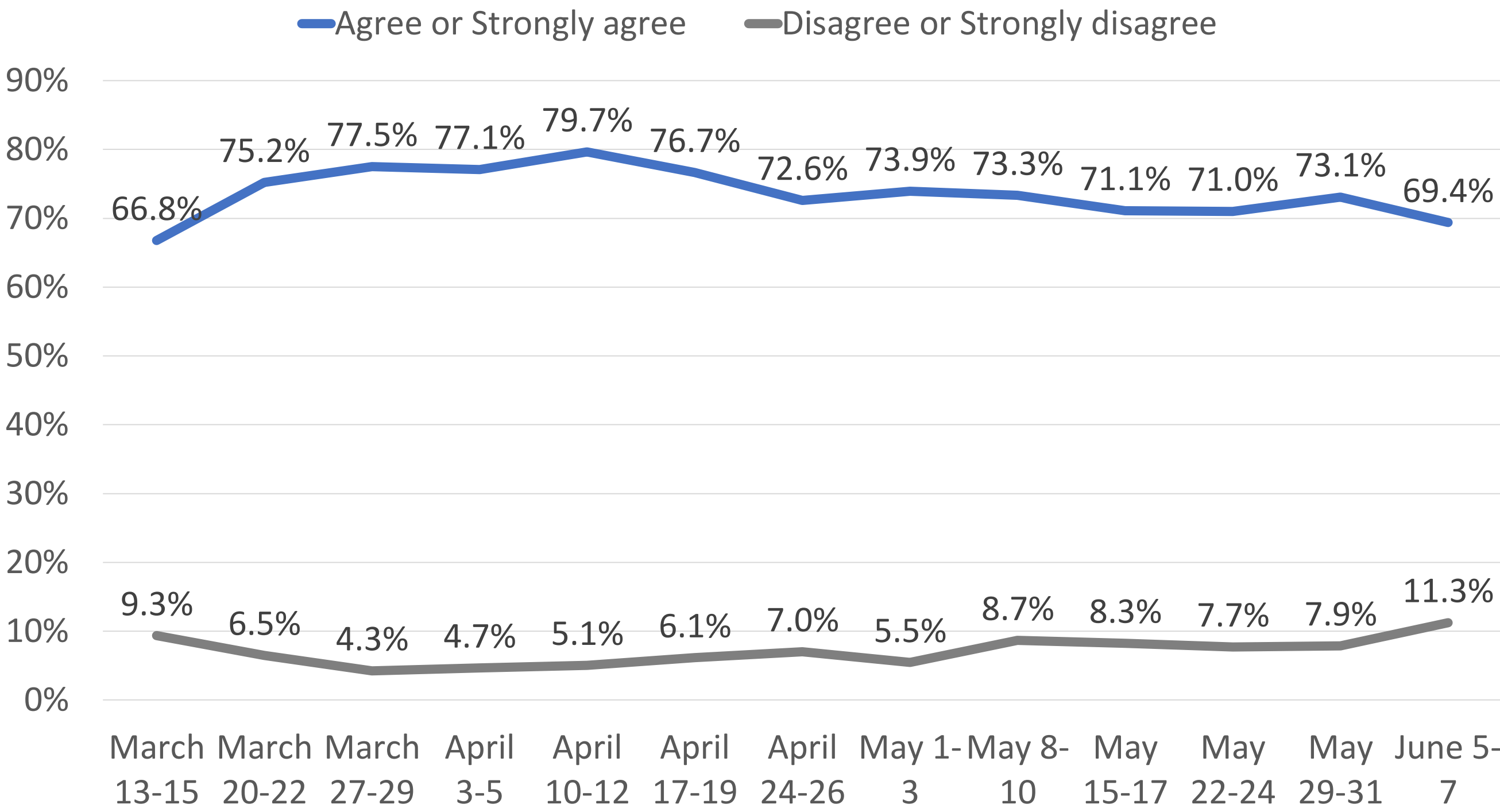
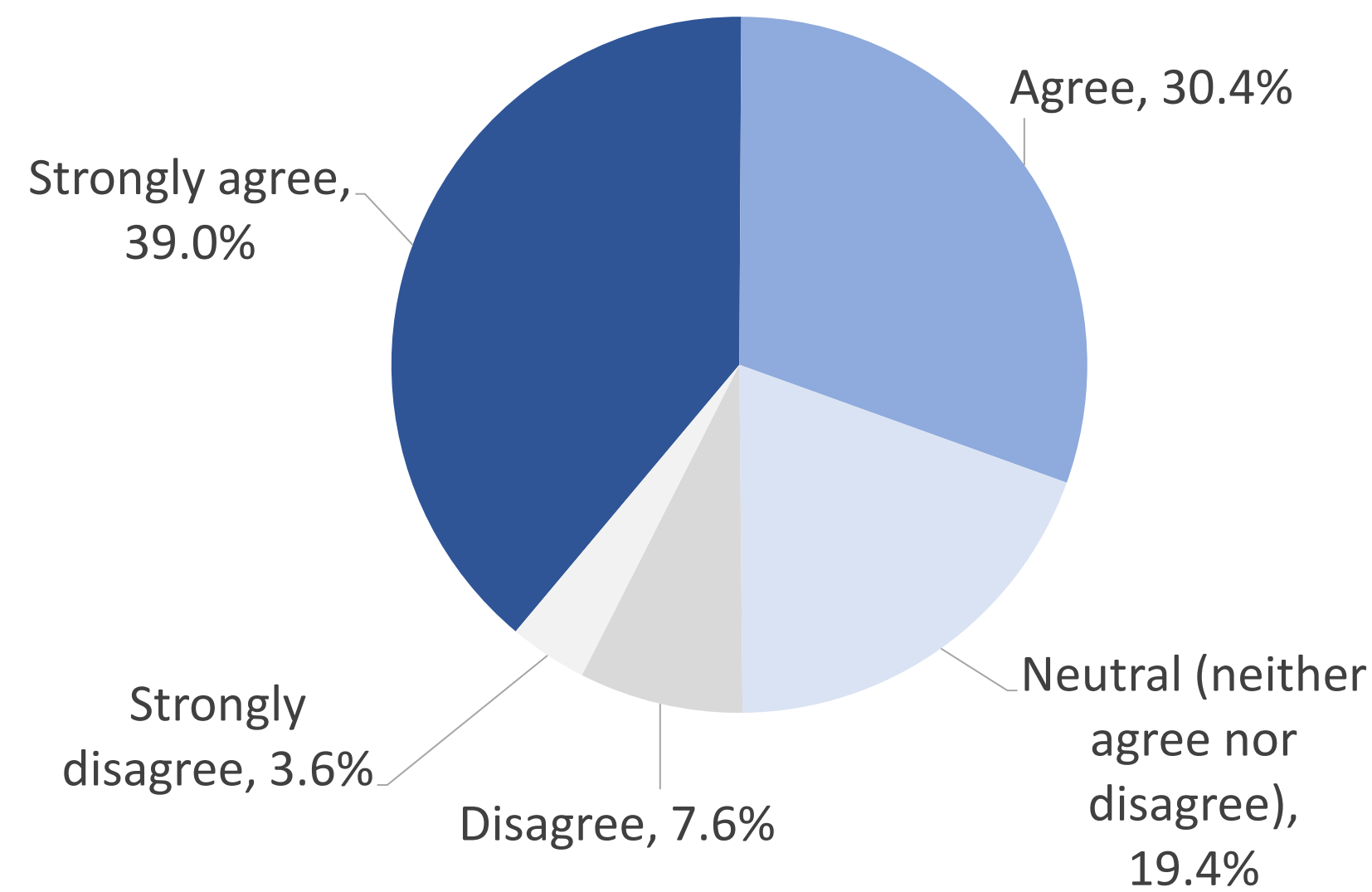
(Base: Employed respondents, 1,029 completed surveys. Data collected June 5-7, 2020)



Avoiding Conventions & Conferences

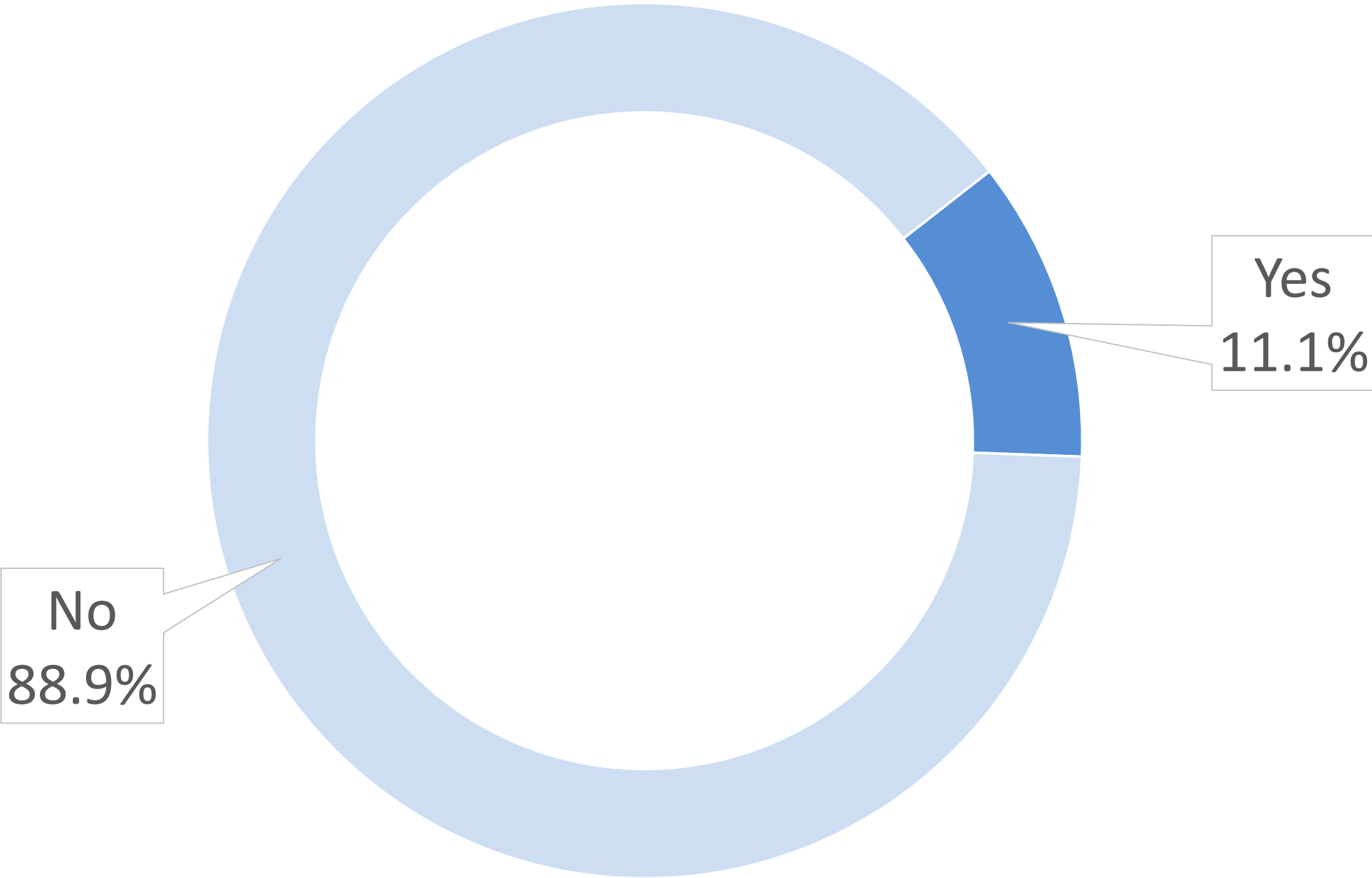
How much do you agree with the following statement?

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 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 and June 5-7, 2020)

Meetings & Upcoming Travel

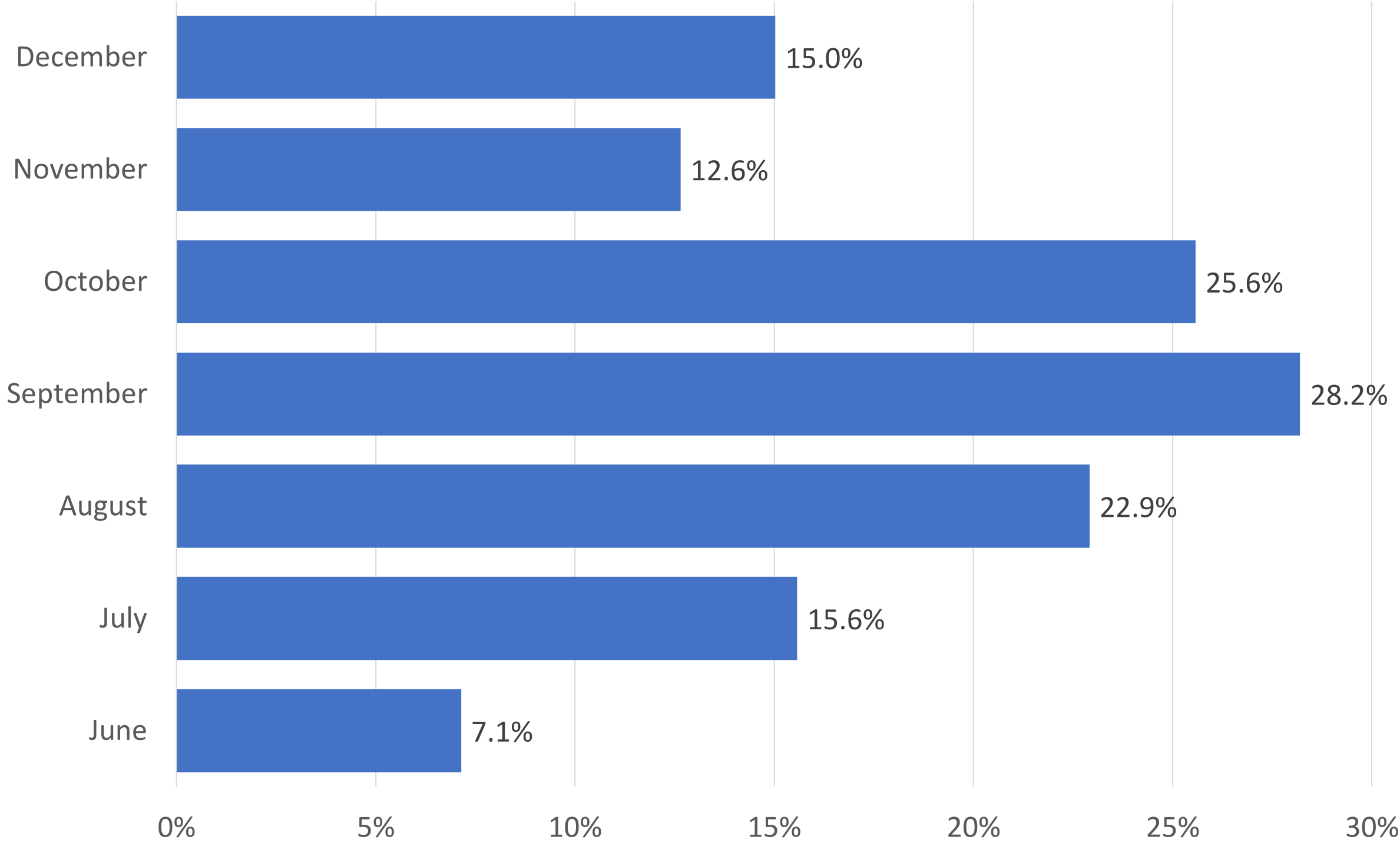


**Convention Travelers:
25%**

QUESTION. Do you currently have any travel even tentatively planned for a convention, conference or other group meeting later this year?

(Base: Wave 13. All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)

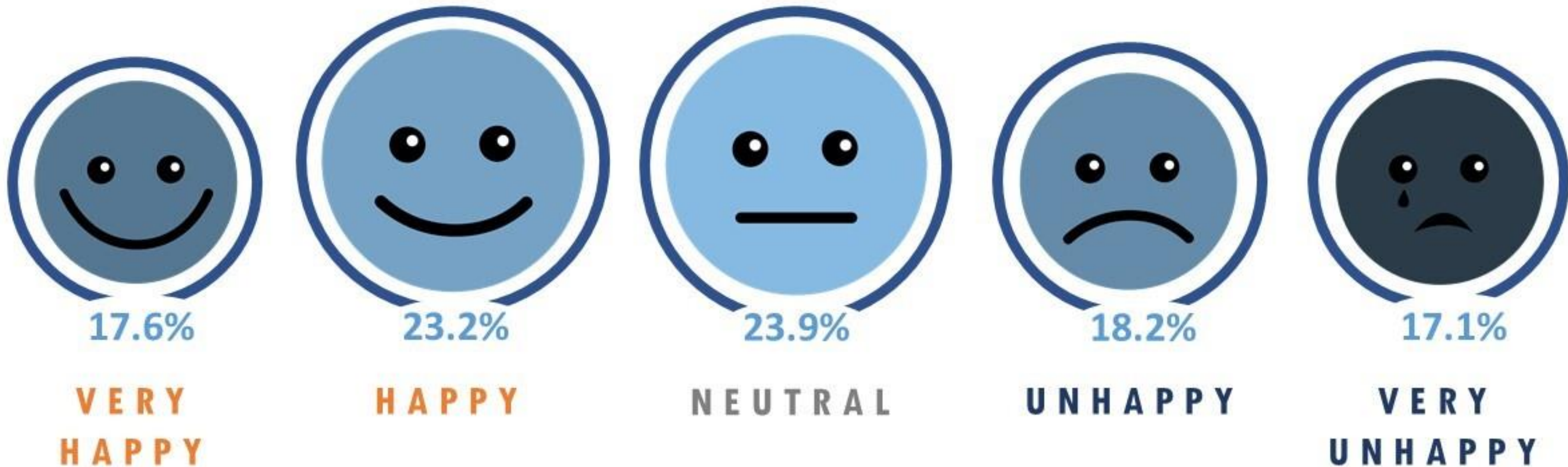
Meetings & Upcoming Travel



Question: In what months do you have travel for a CONVENTION, CONFERENCE OR GROUP MEETING planned?

(Base: Wave 13. Respondents with a planned meeting this year, 121 completed surveys. Data collected June 5-7, 2020)

CONVENTION TRAVELERS: RESPONSE TO BEING ASKED TO ATTEND A CONVENTION/CONFERENCE THIS FALL





KEY TAKEAWAYS

- **Employed Americans largely feel discomfort about out-of-state business travel in the near term**
- **Americans continue to open up to returning to conventions and group meetings, particularly in the Fall or later—and a quarter of convention travelers plan to attend at least one of these events this year**
- **Four in ten conventions/conference travelers would be happy to attend a convention in the Fall**

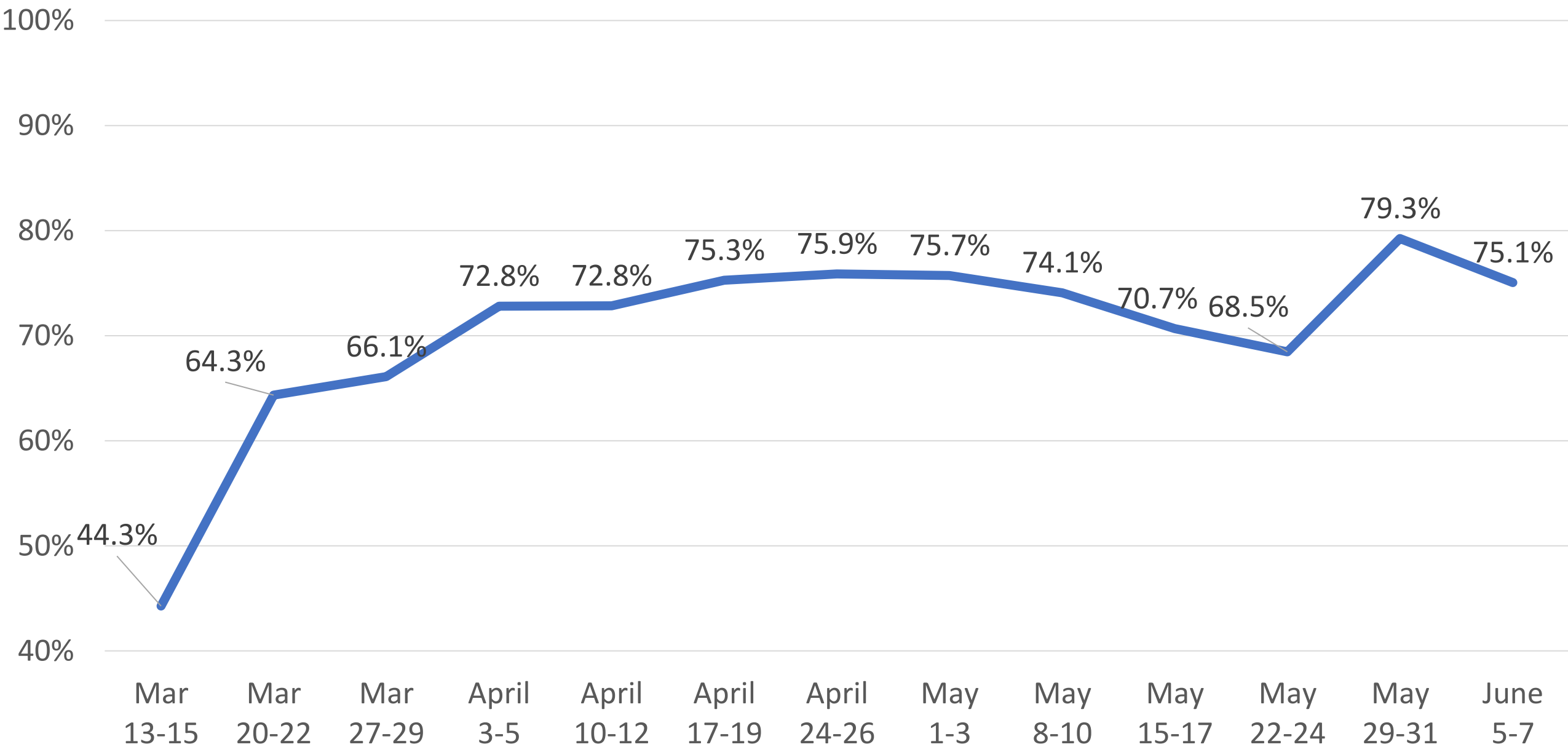
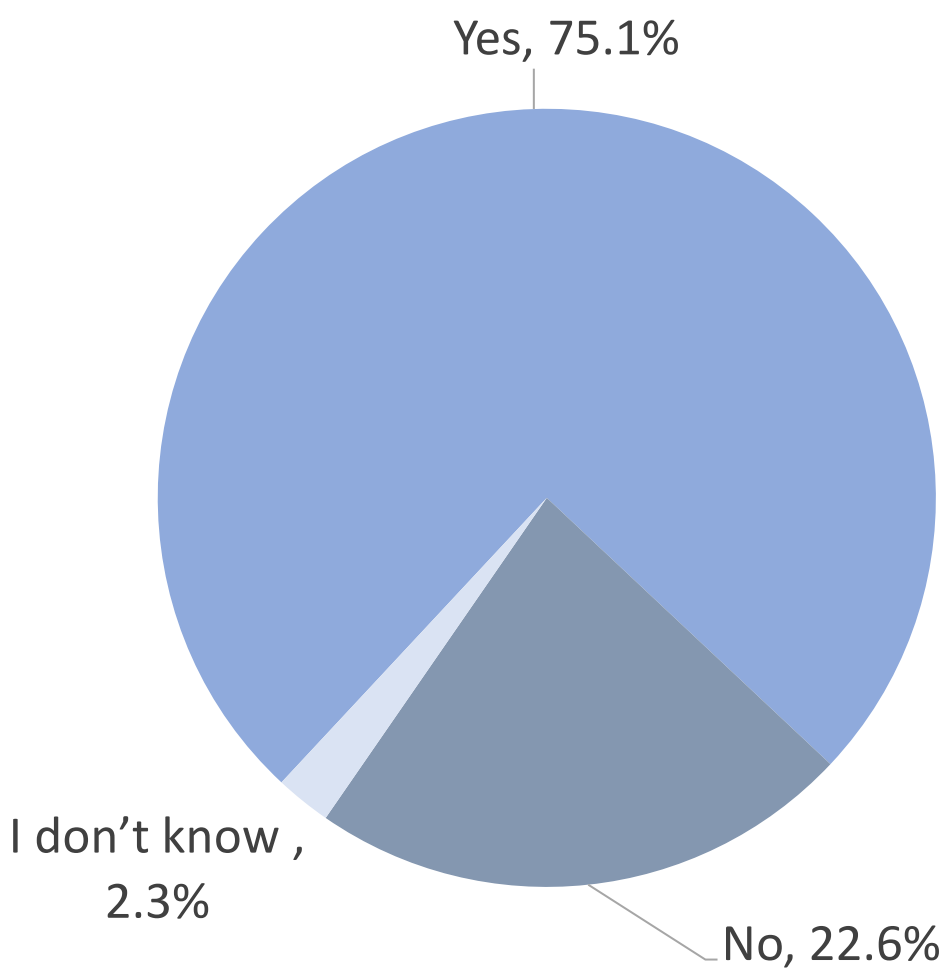


The Continuing Impact of the Pandemic

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.)

Wave 13 (June 5-7)

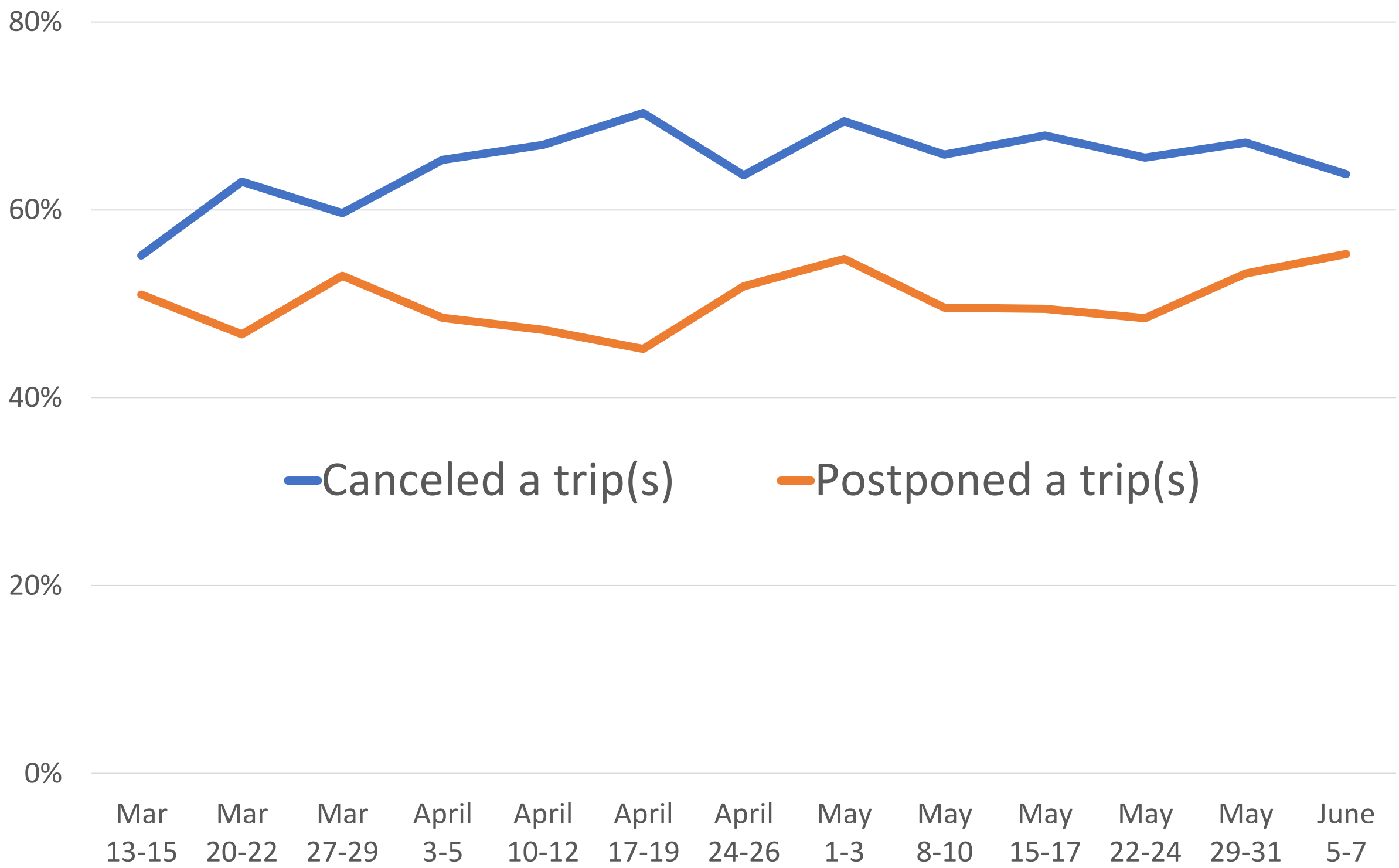


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 ,1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

How the Coronavirus has Impacted Travel

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

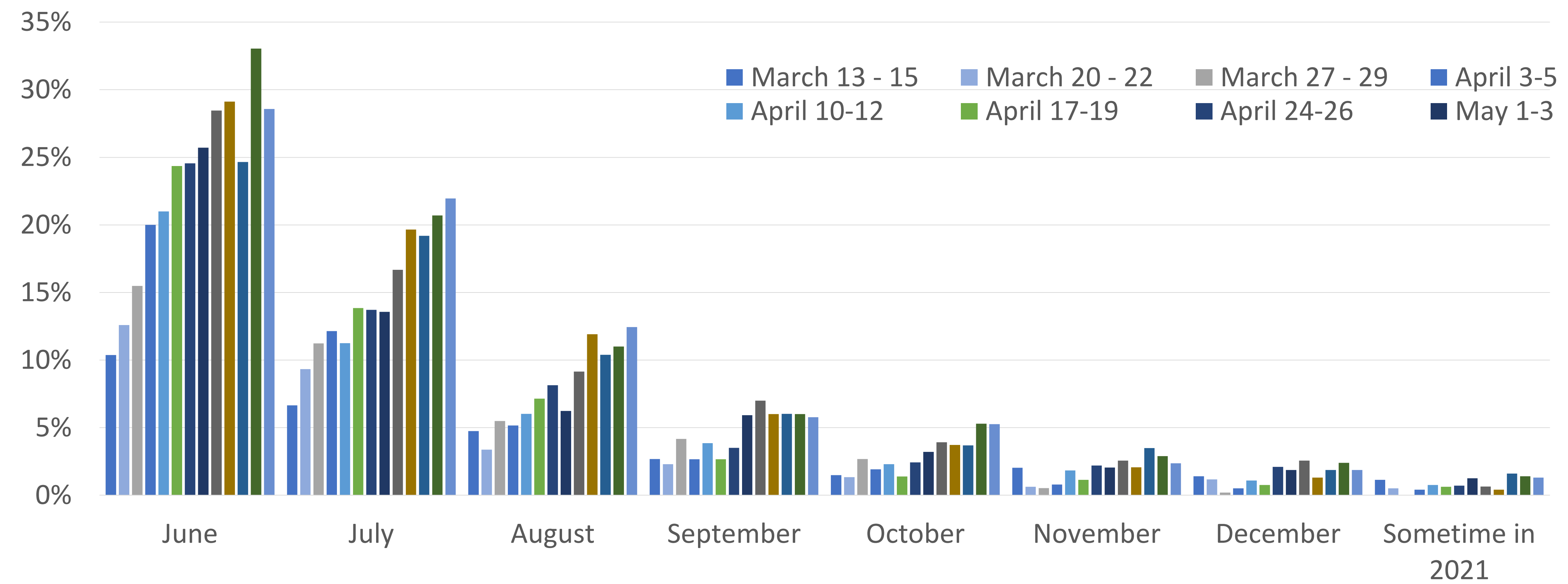
Due to the coronavirus situation, I have_____.



(Base: 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 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 and June 5-7, 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 and 616 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 and June 7-9, 2020. Note: Data purposefully excluded from this chart for readability.)

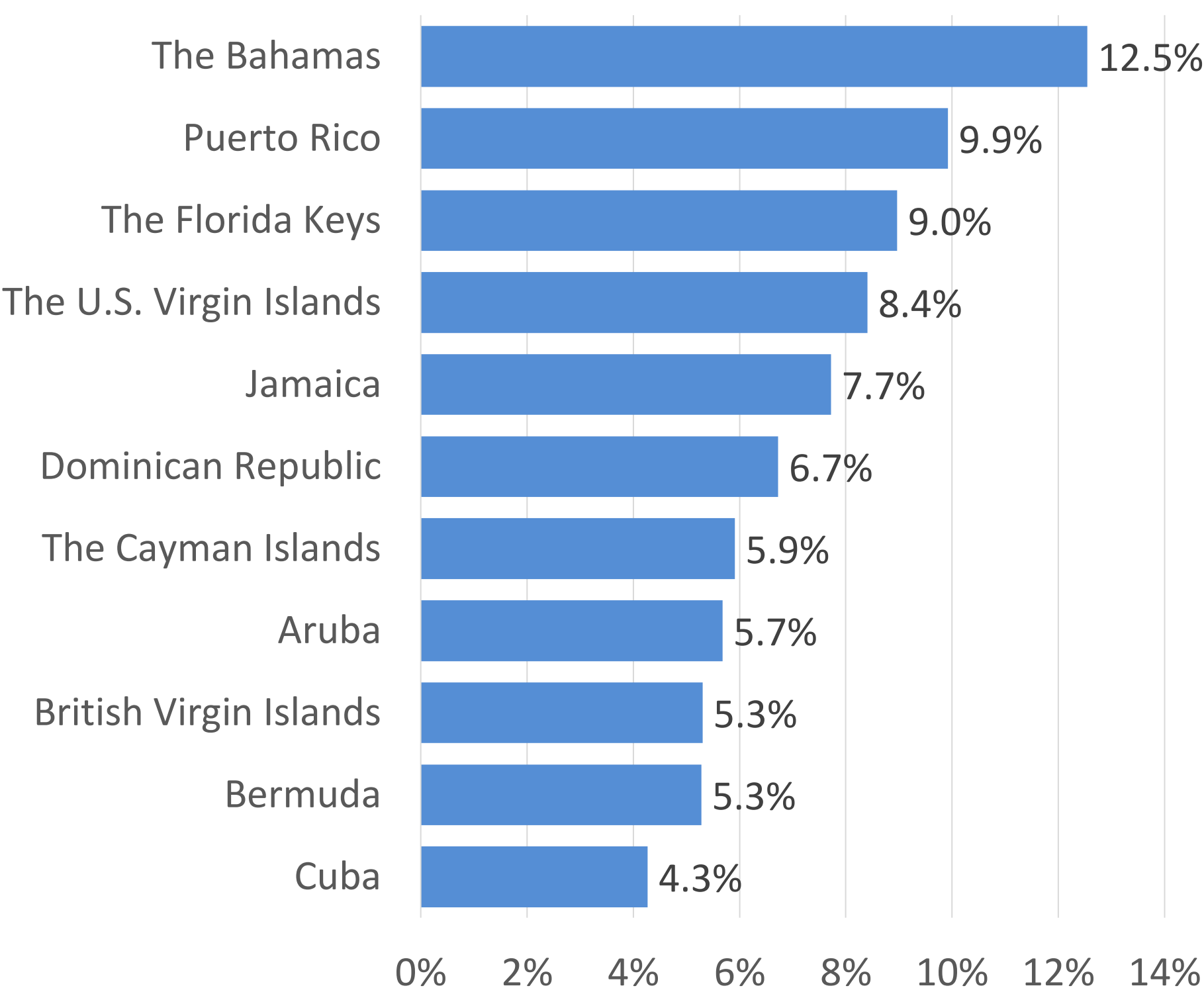
A vibrant tropical beach scene. In the foreground, several tall palm trees with green and yellow fronds stand on a sandy beach. The middle ground shows a clear turquoise ocean with white waves breaking on the shore. In the background, a few white lounge chairs are scattered on the sand, and a small dog is visible. A modern building is partially visible in the distance under a clear blue sky.

Health Screenings in Paradise

Would mandatory pre-trip screenings be a deal breaker for travelers?

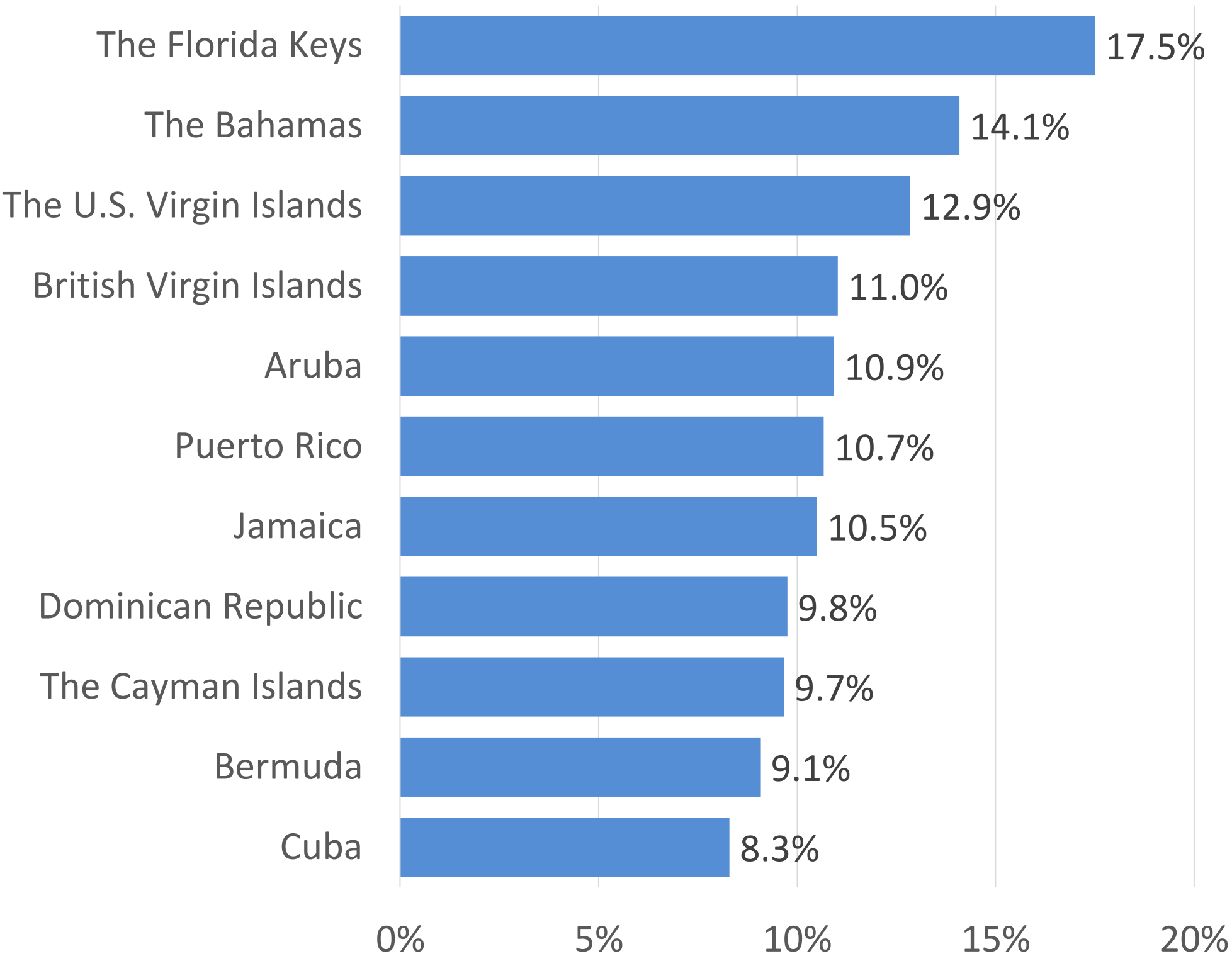
Past and Likely Future Visitation: Selected Islands

Past 3 Years



Question: Which of these islands have you visited (or traveled within) in the PAST THREE (3) YEARS?

Next 3 Years



Question: Which of these islands will you be likely to visit (or travel within) in the NEXT THREE (3) YEARS?

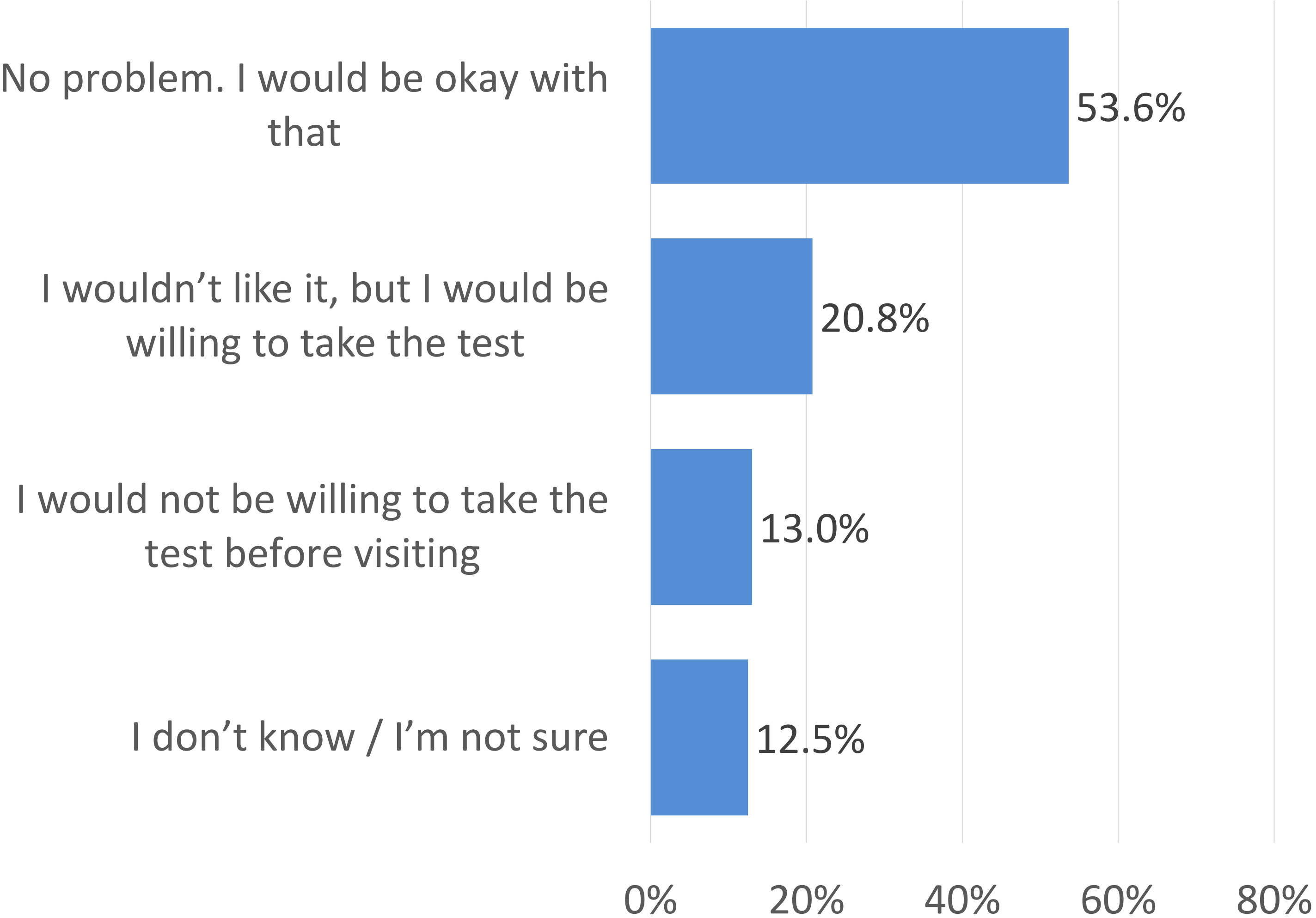
(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)

If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, as a traveler how would you feel? (Select the one that best describes you)

- ☐ No problem. I would be okay with that
- ☐ I wouldn't like it, but I would be willing to take the test
- ☐ I would not be willing to take the test before visiting
- ☐ I don't know / I'm not sure

Feelings about Pre-trip Testing

Question: If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, as a traveler how would you feel? (Select the one that best describes you)

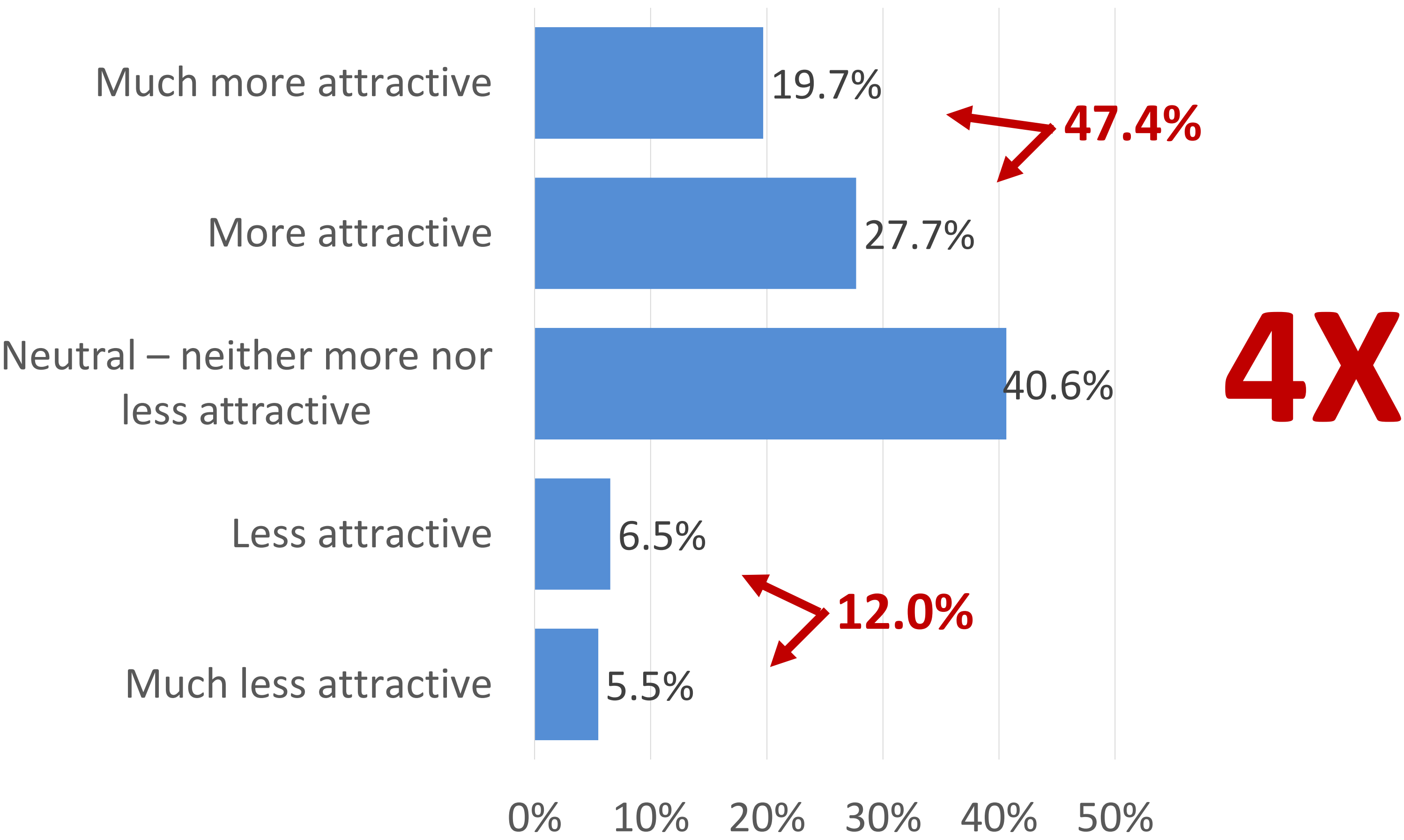


(Base: All respondents, 1.214 completed surveys. Data collected June 5-7, 2020)

Impact on Destination Appeal

Question: If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, would that make the island a **MORE OR LESS ATTRACTIVE** place to visit? (Select one to fill in the blank)

This requirement makes the island _____ as a place to visit



(Base: All respondents, 1.214 completed surveys. Data collected June 5-7, 2020)



KEY TAKEAWAYS

- **The pandemic continues to adversely impact travel**
- **Testing programs will likely have a net positive benefit for island and other destinations**



Coronavirus Travel Sentiment Index

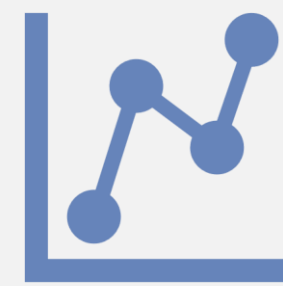
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 8th

What is a Predictive Index?



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



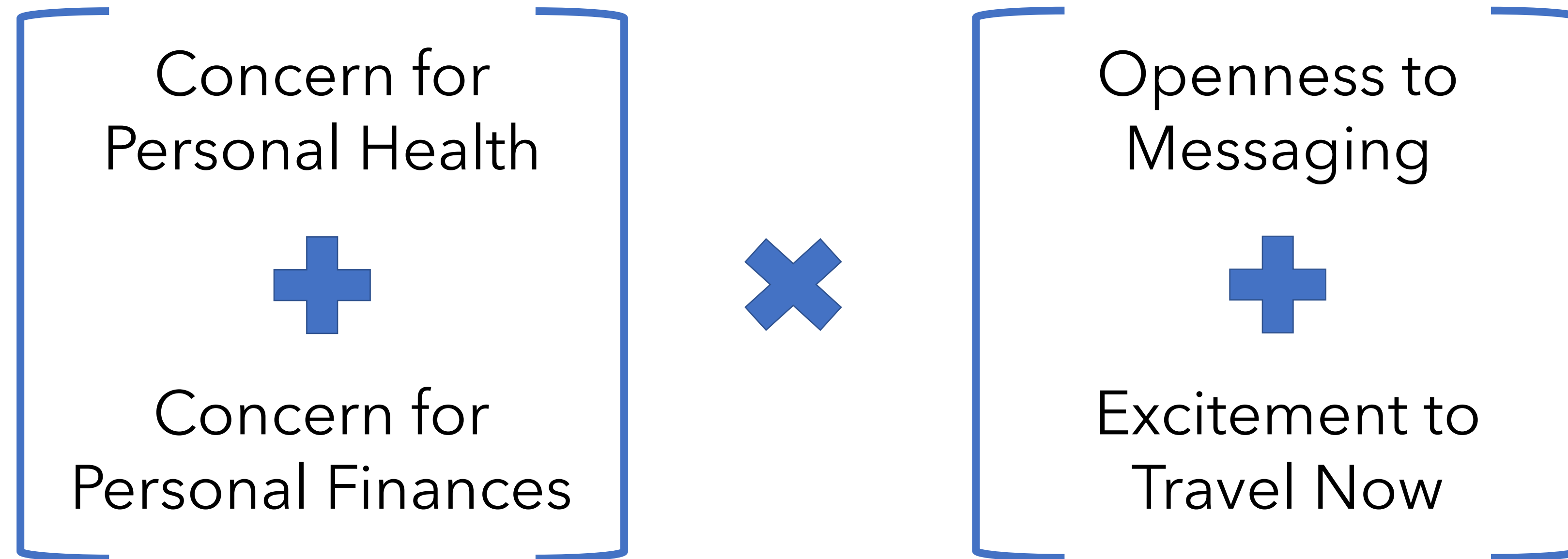
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

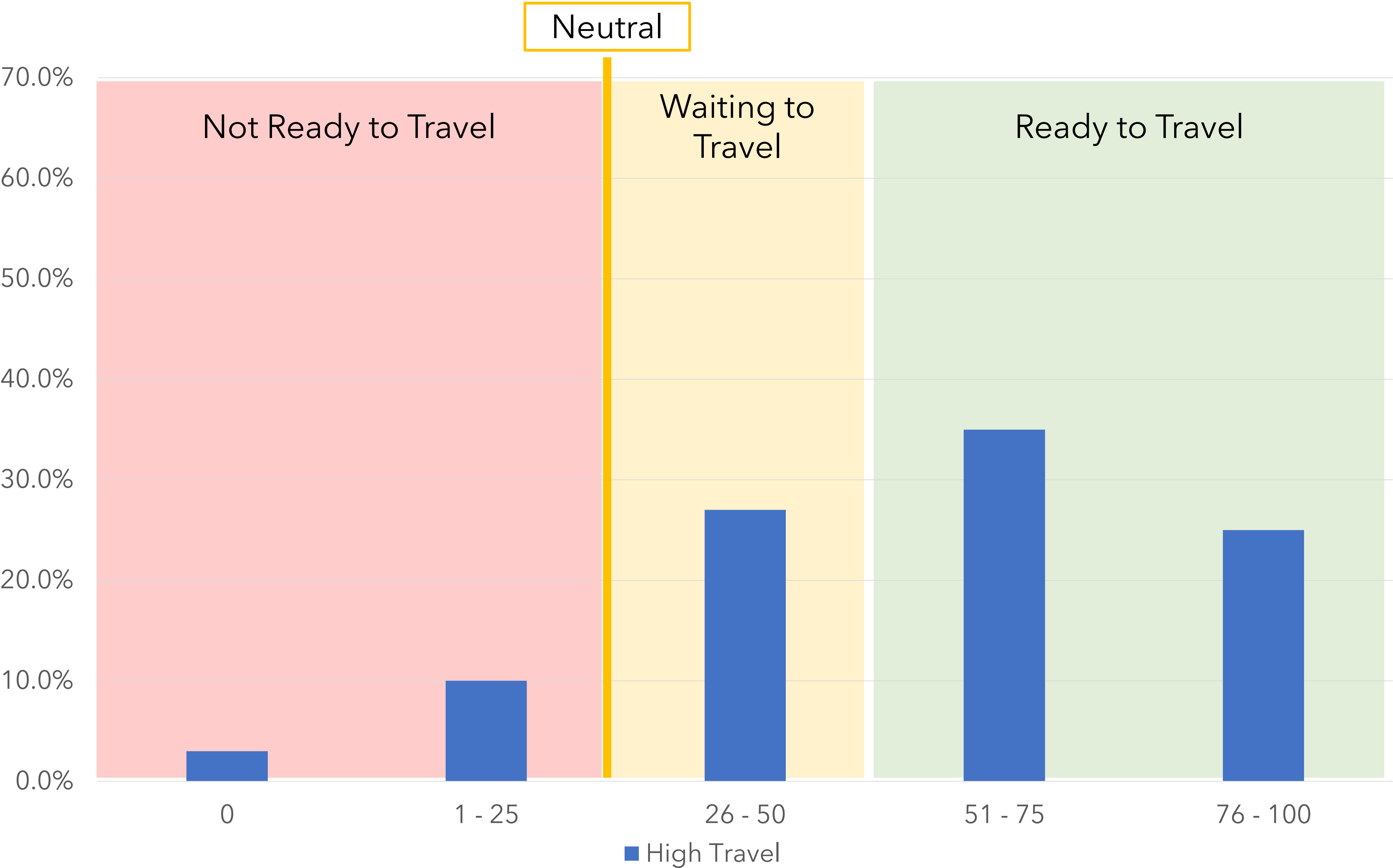
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



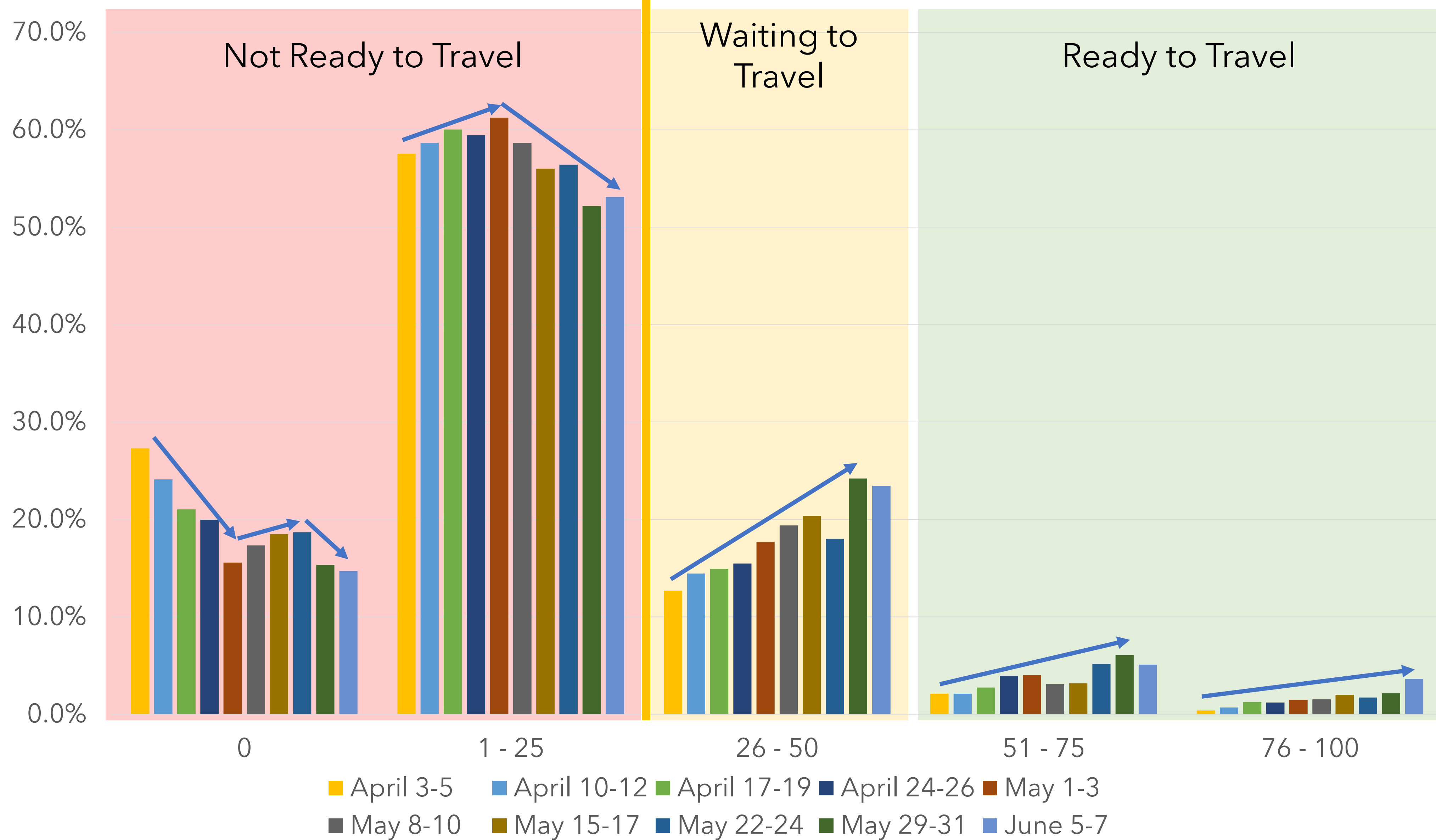
*Normalized to a 100pt scale

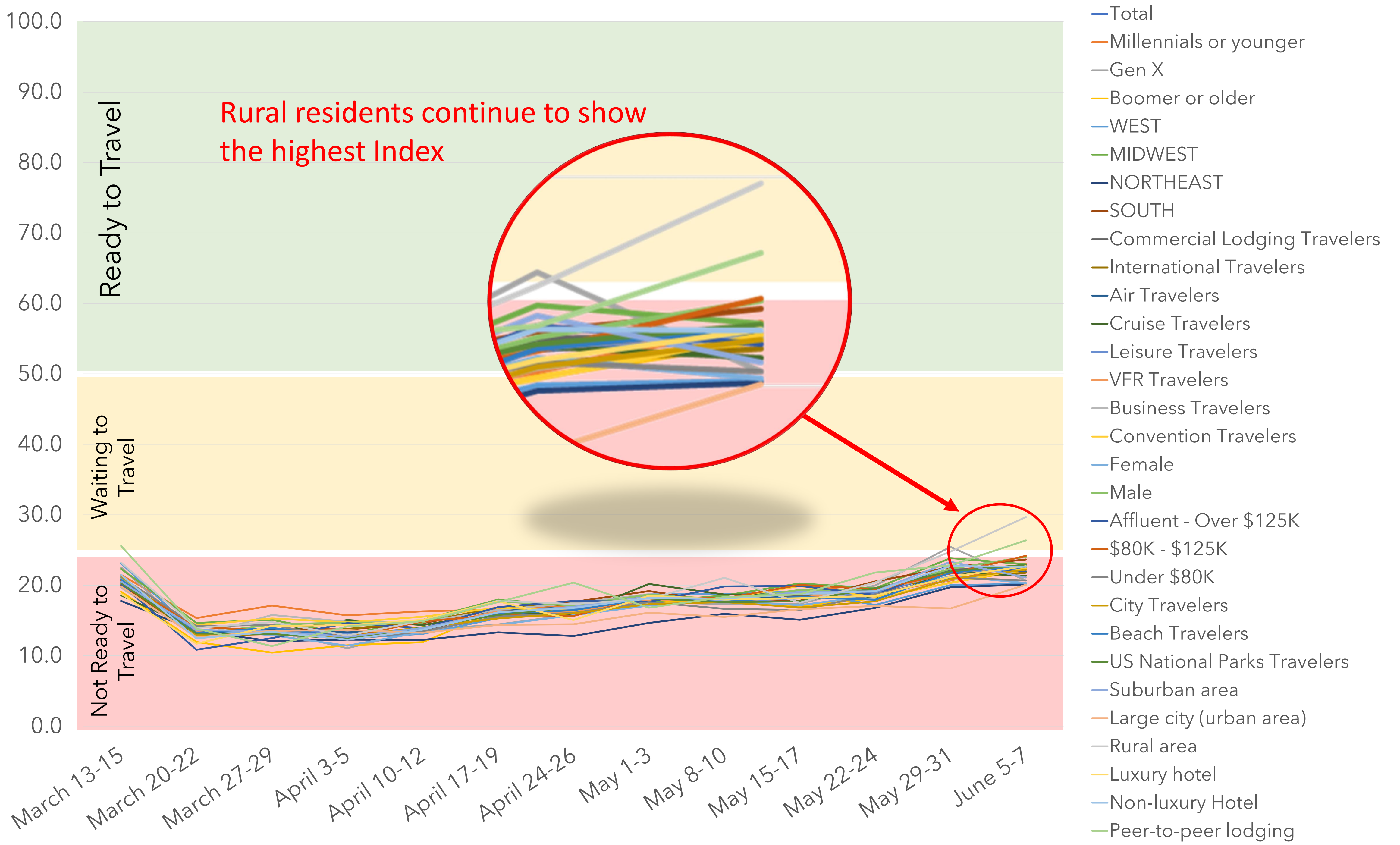
Healthy Travel Outlook



Travel Outlook

Neutral

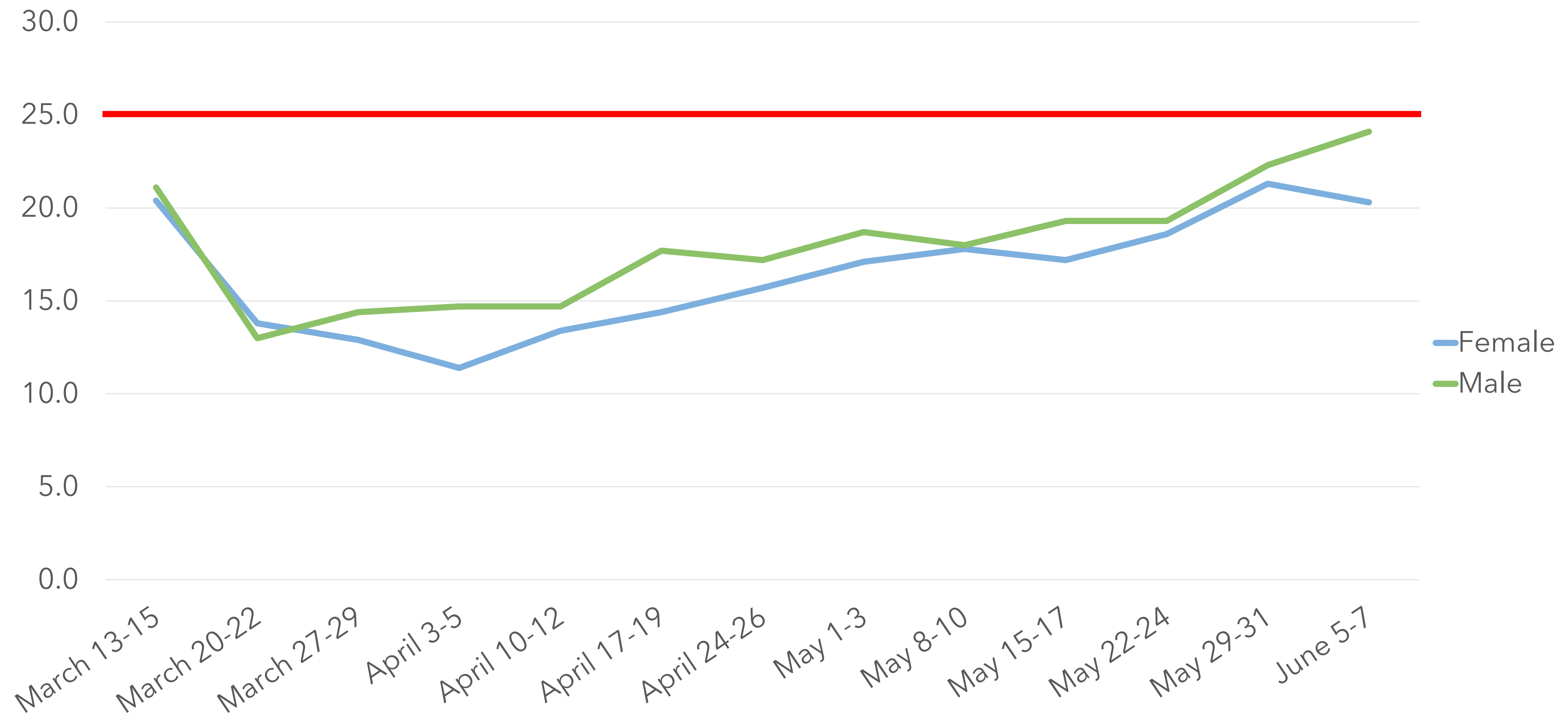




Gender

Points of Interest:

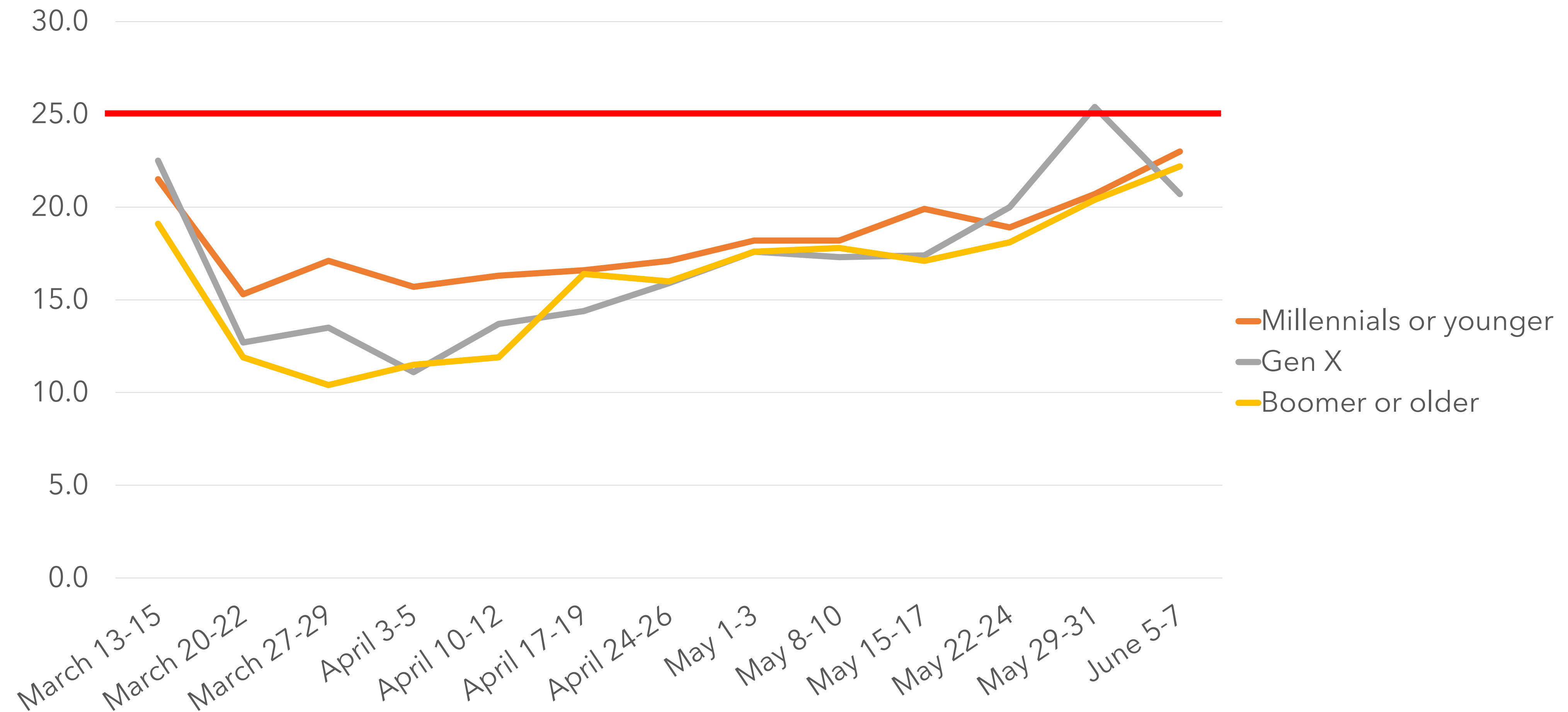
- Safety and financial concerns dropped for Men this week, while concerns for women largely remained consistent with previous weeks.
- Men reported a significant drop in the agreement with the statement, "I'm planning to avoid travel until the Coronavirus situation blows over"



Generation

Points of Interest:

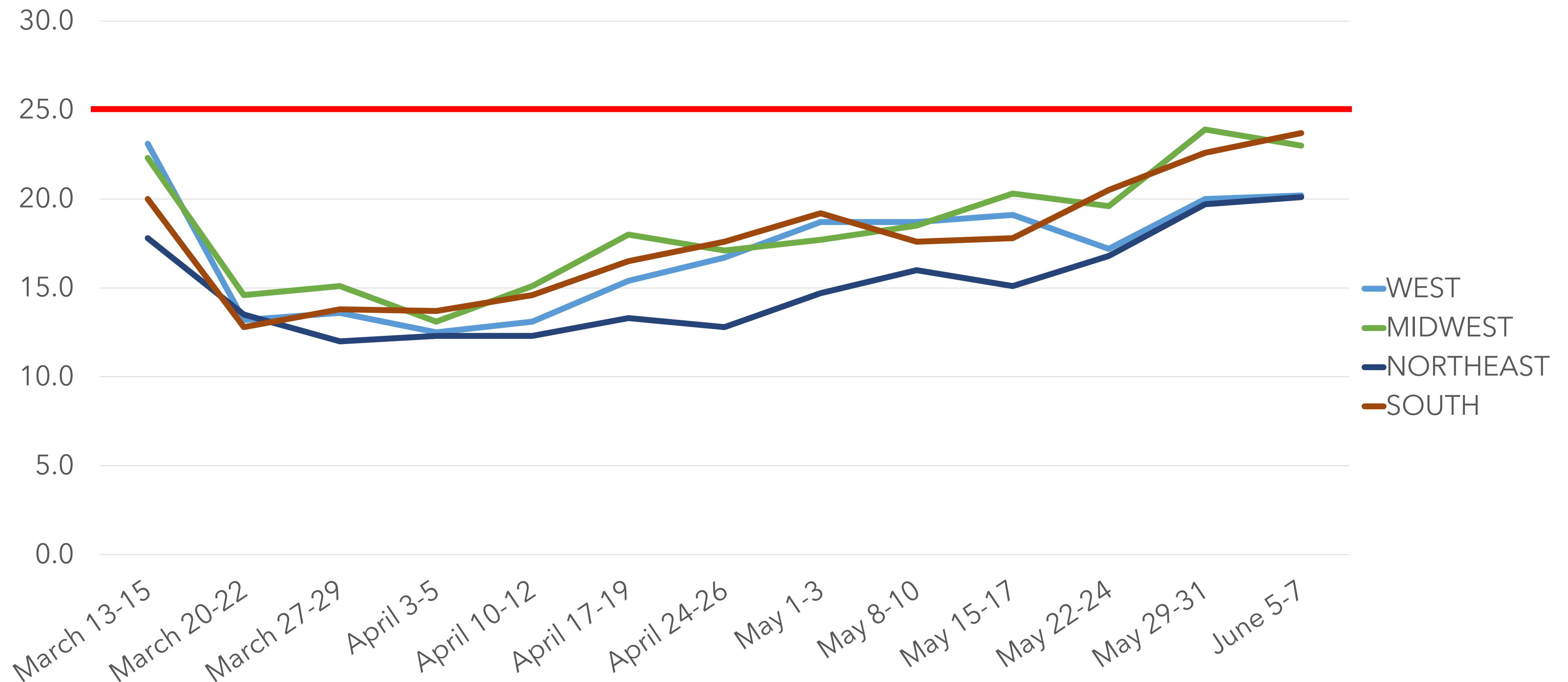
- Gen X safety concerns went back up this week (6.5 out of 10, up from 6.1 last week) while Millennials and Boomers showed modest drops in concern for safety.
- Millennials showed a slight rise in openness to travel messaging while both Gen X and Boomers saw slight drops.



US Region

Points of Interest:

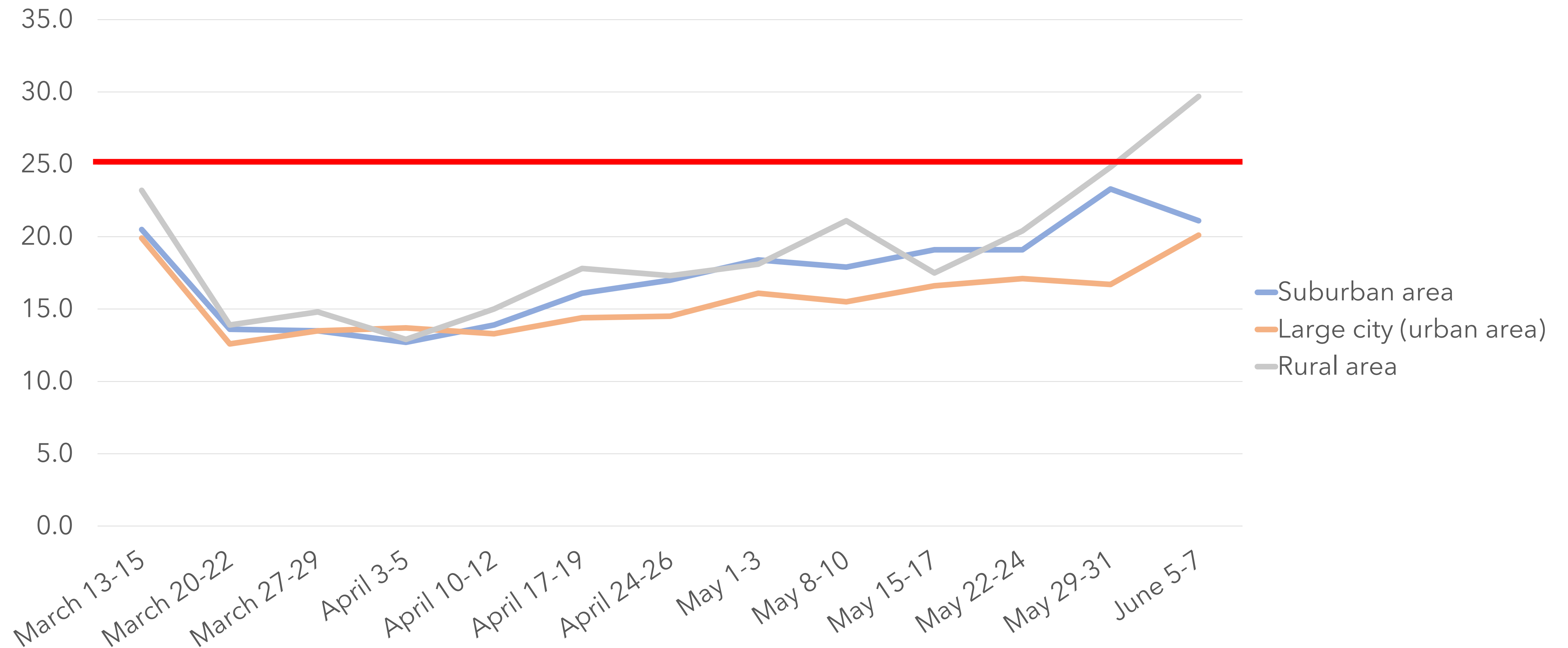
- Safety concerns in all regions except the Midwest showed slight drops this week while financial concerns showed drops most significantly in the South.
- Among all regions the Northeast again showed the most optimism about the coronavirus situation improving in the next month (44.4% up from 34.8% last week think the situation will get better or much better in the next month).



Type Of Residence

Points of Interest Impacting Index Scores:

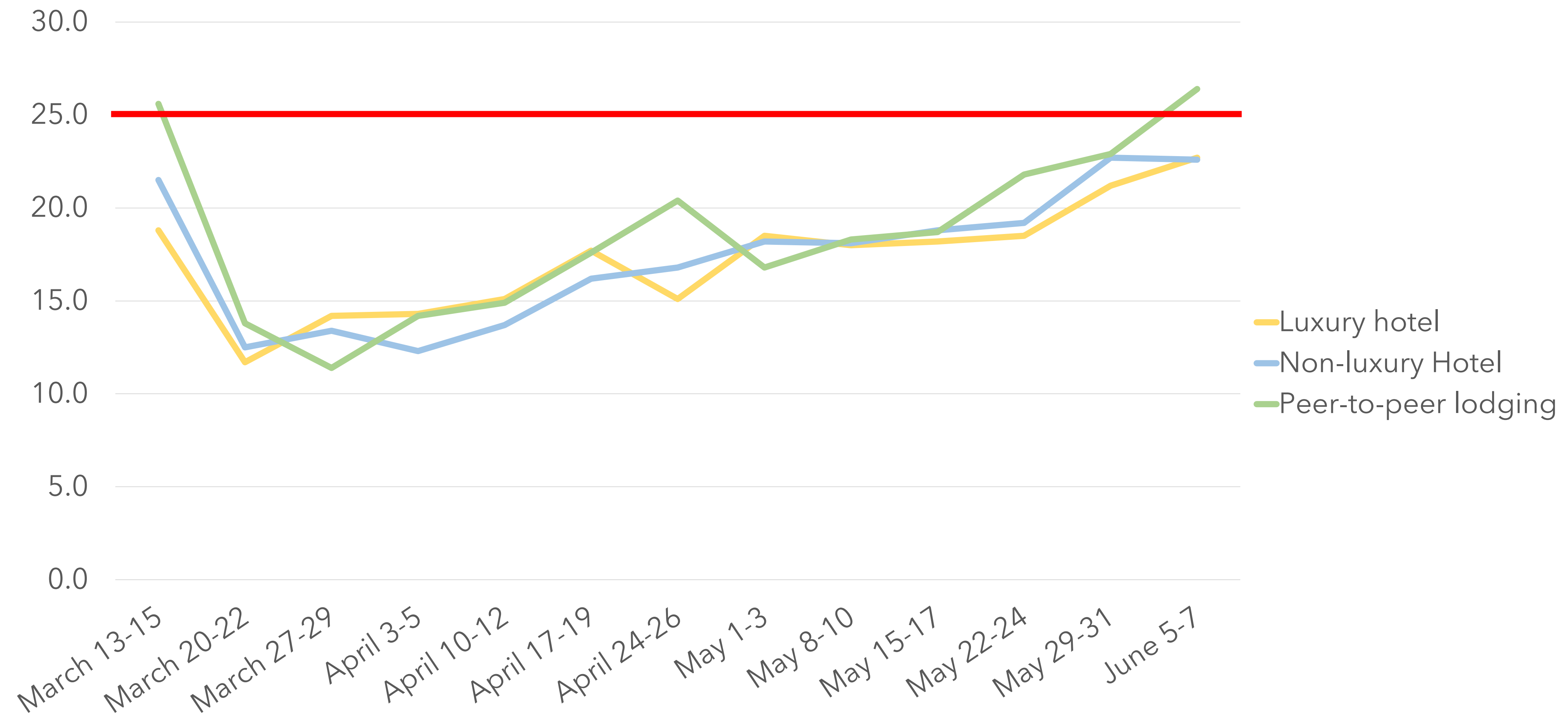
- Safety concerns grew again among Suburban respondents this week while showing drops for Urban and Rural respondents.
- Rural respondents reported modest growth in openness to travel messaging and the relatively highest levels of excitement to travel now.



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer lodging travelers showed a significant decrease in concerns for personal safety this week (5.9 out of 10, down from 6.6 last week).
- Luxury hotel travelers were most likely to report they planned to travel before the end of 2020.





THOSE WHO ARE READY TO TRAVEL:

- **Affluent, primarily identify as Caucasian and one-in-five have children under 18**
- **Are comfortable with their home state re-opening its economy right now**
- **Feel comfortable going out into and experiencing their community**
- **Are more open to having travelers come to their community**



THOSE WHO ARE READY TO TRAVEL:

- **Expect the coronavirus situation in the U.S. to get better in the next month**
- **Would feel happy if a friend or family member told them they purchased airline tickets for a June trip**
- **Disagree with the statement that they will not travel until there is a vaccine**
- **Expect that they will be traveling this Fall**
- **Say that discounts and deals make them more interested in traveling in the next three months**
- **Found doing online searches related to travel and travel apps. Likelier to be looking at attraction and airline websites right now**



THOSE WHO ARE READY TO TRAVEL:

- **Have leisure trips planned in the summer months of June, July and August. In fact, one-third expect that their next road trip will take place this month**
- **Have a good picture of what their next leisure trip will look like. Nine-in-ten describe their next leisure trip as somewhat or very well-developed**
- **Are likely to report that their personal safety did NOT play a role in decisions for their next leisure trip**
- **Are the likeliest to say that there is no chance that they might cancel their next leisure trip due to the coronavirus situation. They're going no matter what**
- **Found doing online searches related to travel and travel apps. Likelier to be looking at attraction and airline websites right now**

DMO WEBSITE IMPORTANCE STUDY

Preliminary Findings

Thank You

miles

PARTNERSHIP



METHODOLOGY

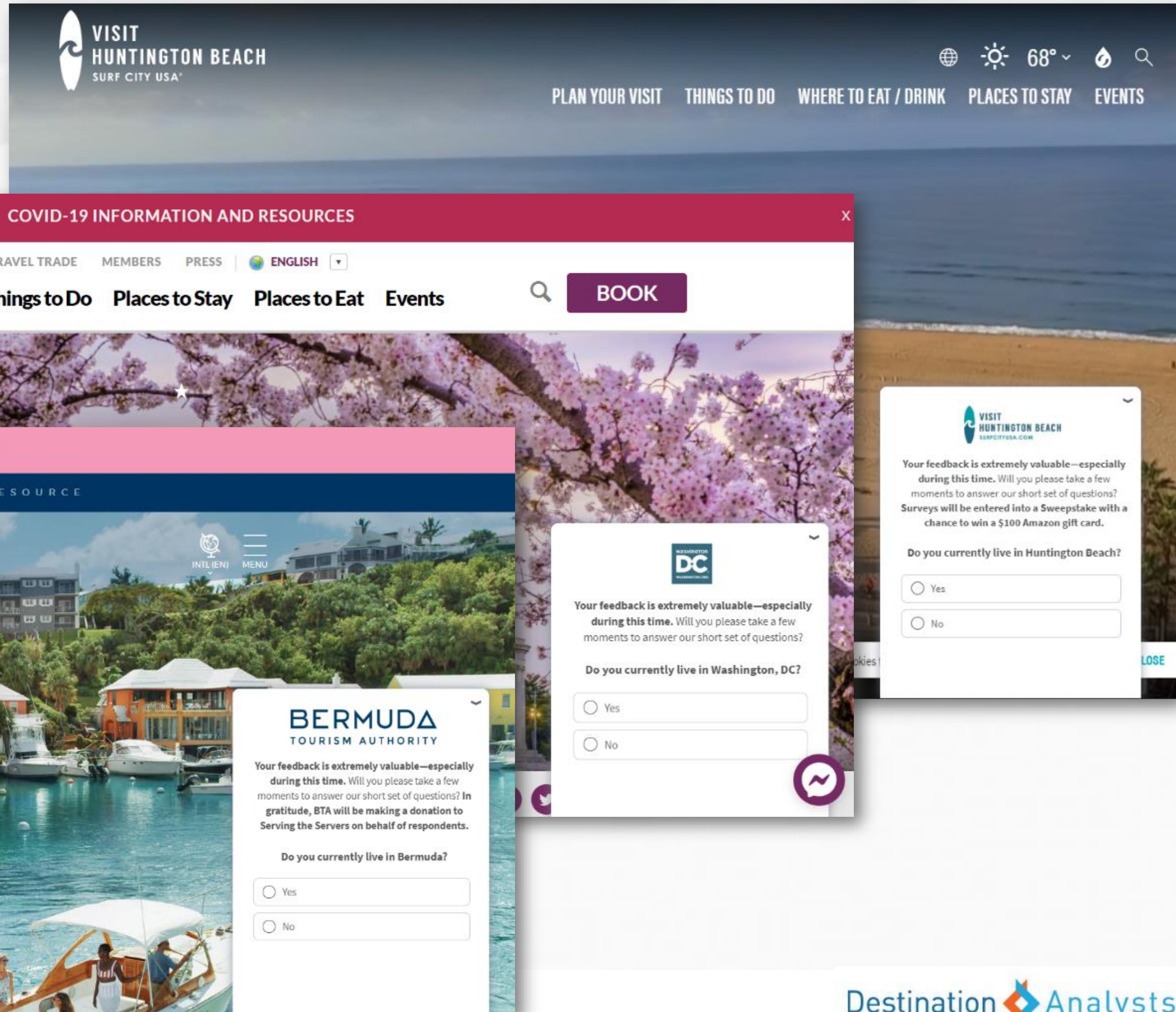
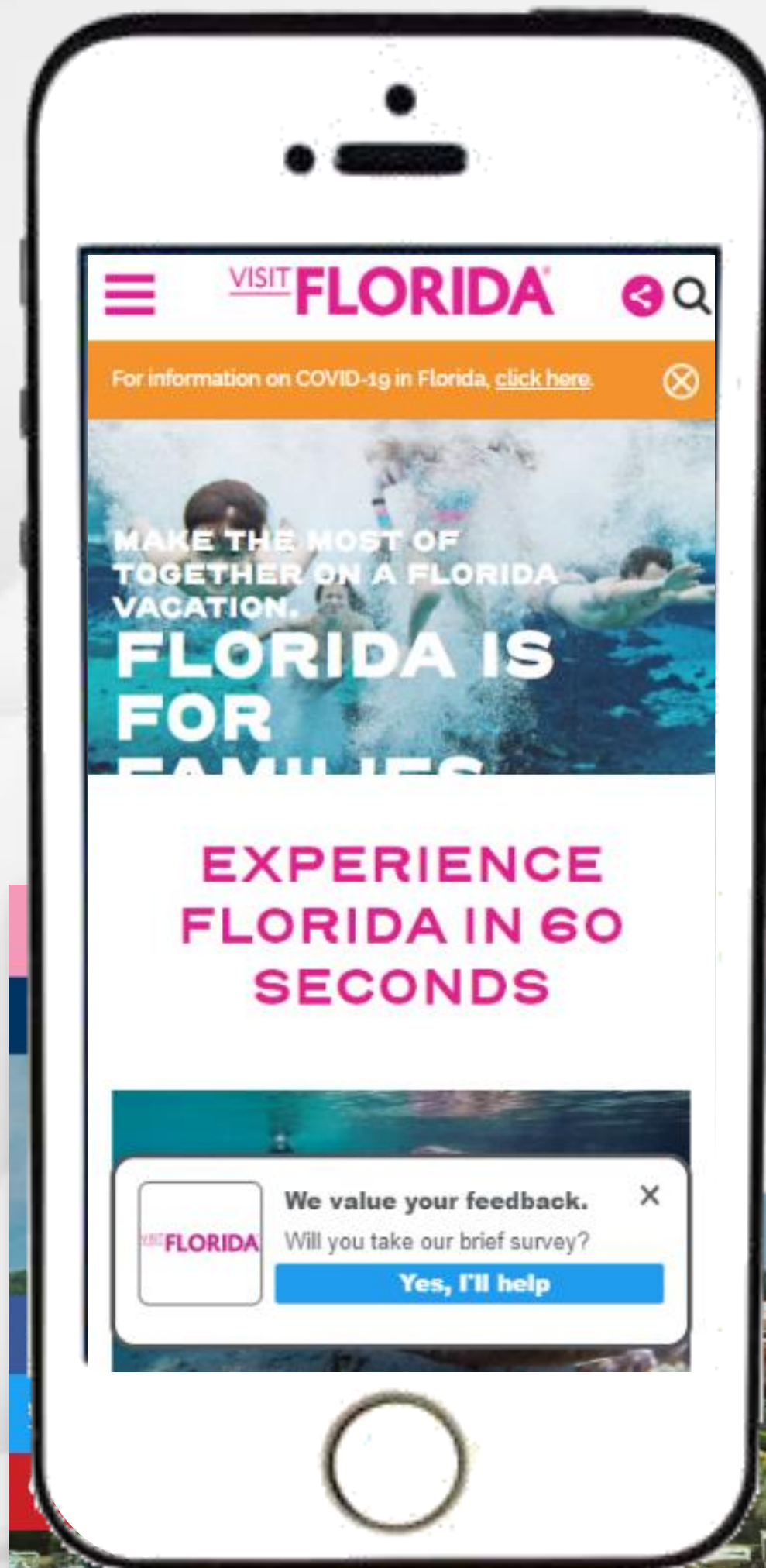
Website User Intercept Survey of Various Audiences:

- Potential Visitors
- Local Residents
- Local Businesses
- Meeting Planners
- Travel Trade
- Journalists

For Each Audience:

- Reasons for visiting DMO site
- Information sought
- Website analytics/behavior
- Metrics for Value & Importance of the DMO Website

60+ Participating DMO Websites



Bermudaful

Colourful beauty, fresh flavours
and natural attractions





5 THINGS YOU'RE GOING TO LEARN TODAY

Who is using DMO websites during this crisis?

Why are they using DMO website?

What content are they seeking?

When are potential visitors planning to travel?

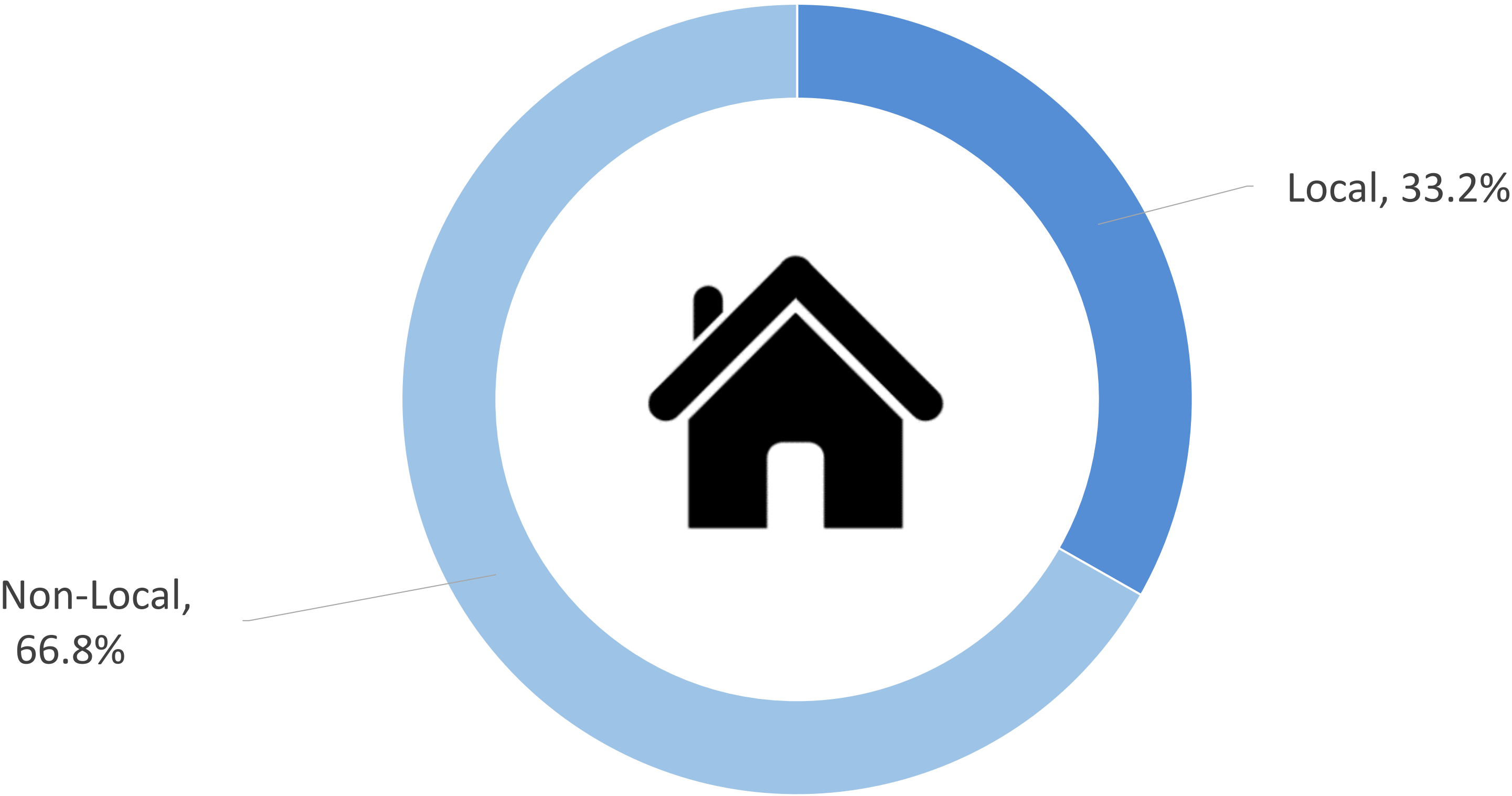
How valuable is the DMO website?



LOCAL RESIDENTS

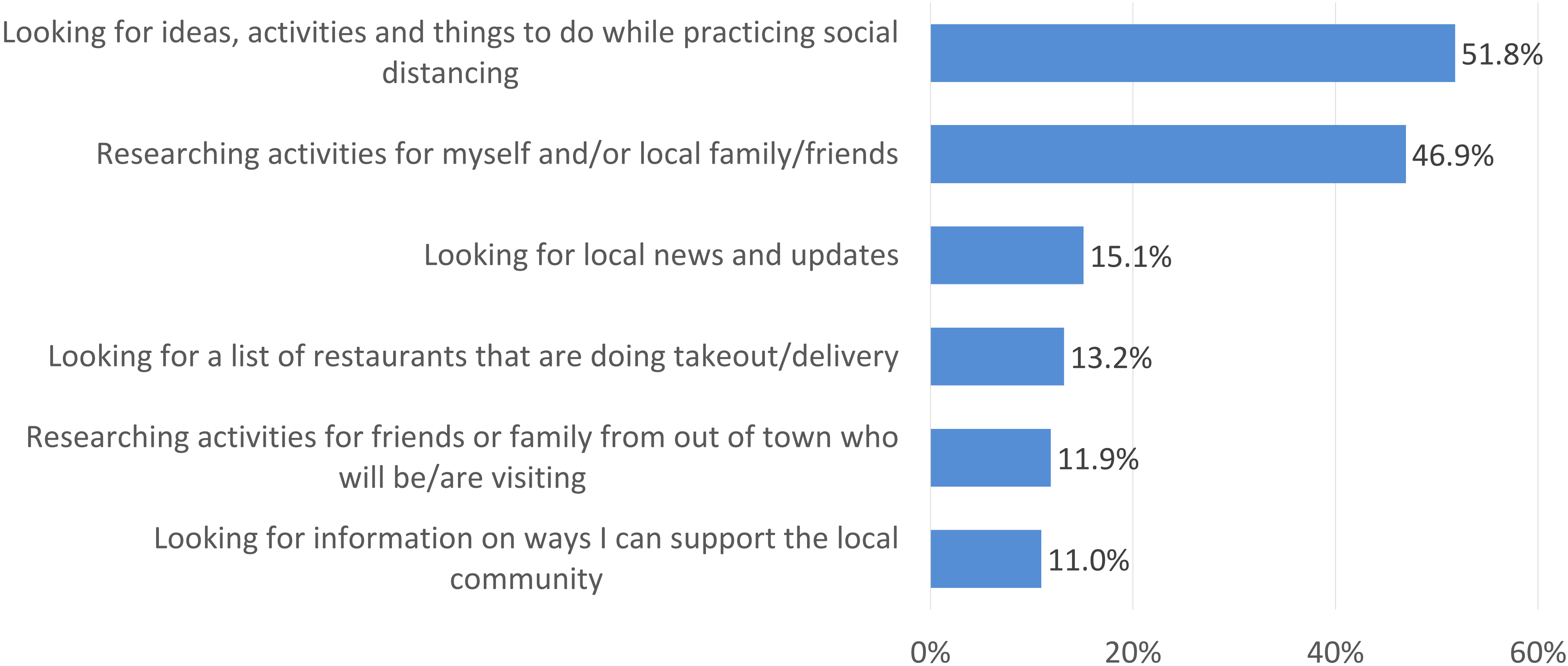
*Respondents who reported residing
within the Destination*

Residents



Do you currently live in Destination?
Base: 12,599

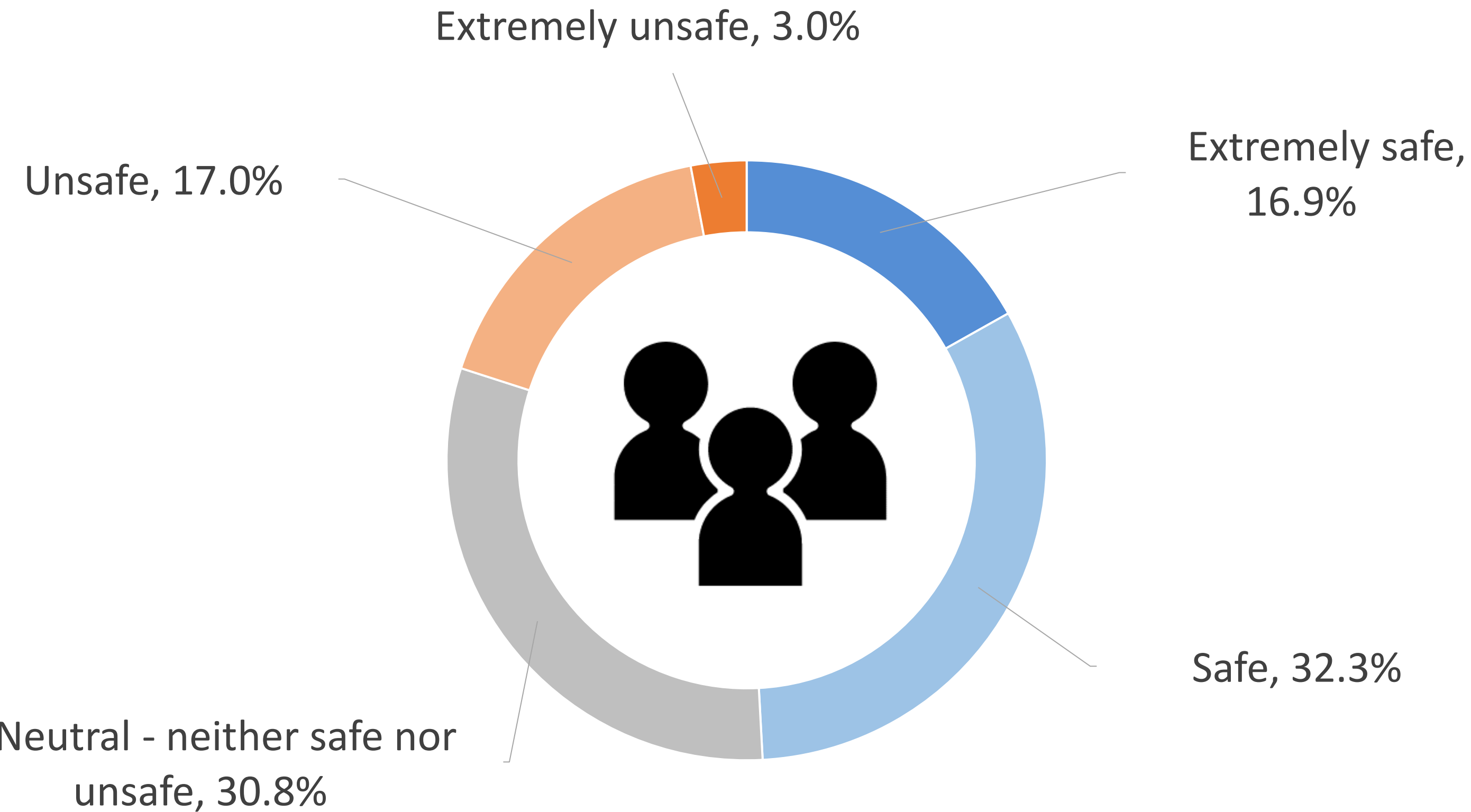
Reasons for Visiting Website



Which of the following describes your reason for visiting our website? (Select all that apply)

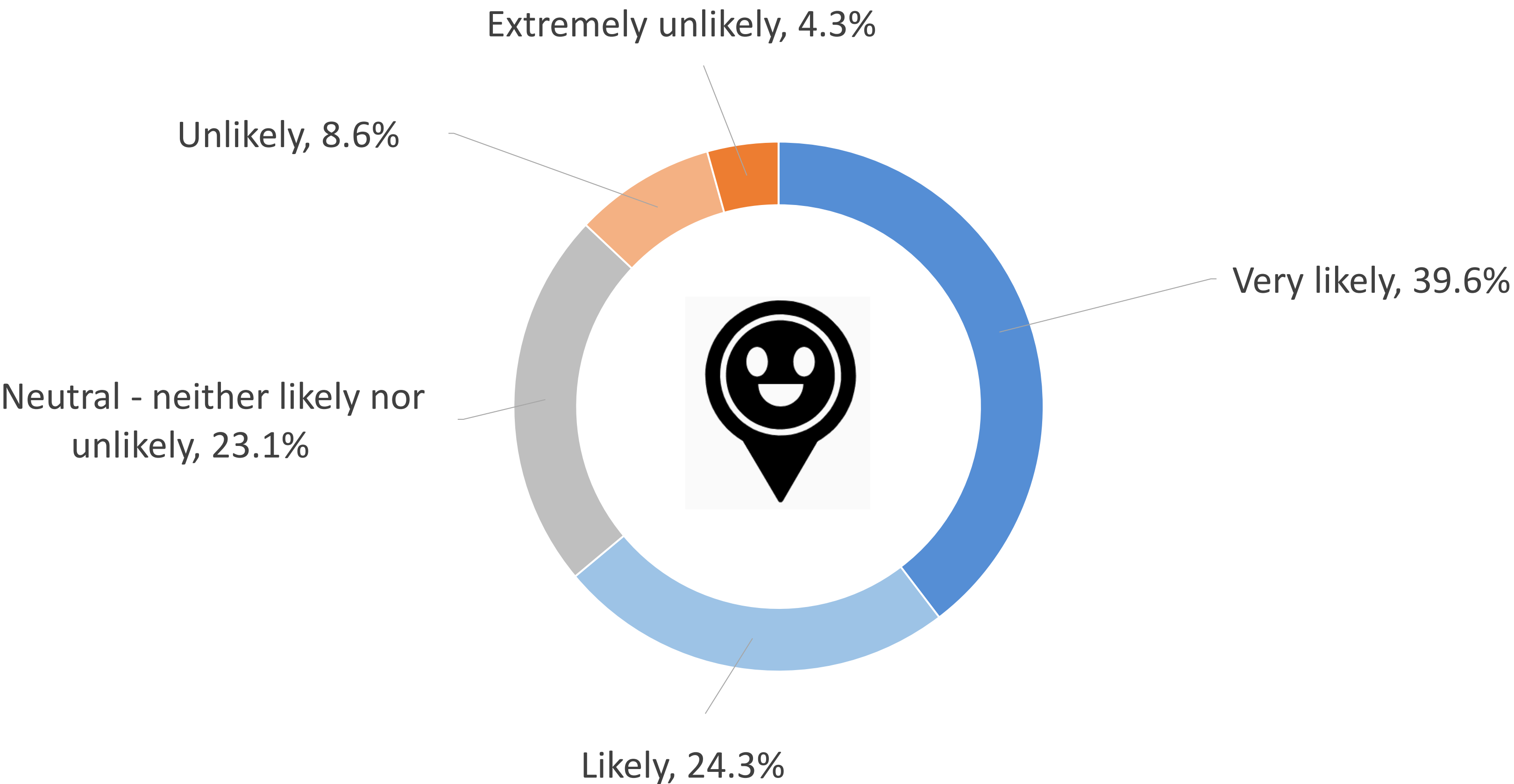
Base: 3,707

Safety In Own Community



At this moment, how safe do you feel about going out into the community (i.e. walking around, shopping, etc.)? Base: 3,709

Likelihood of a Staycation



How likely are you to plan a "Staycation" in Destination in the next six months?
Base: 3,709

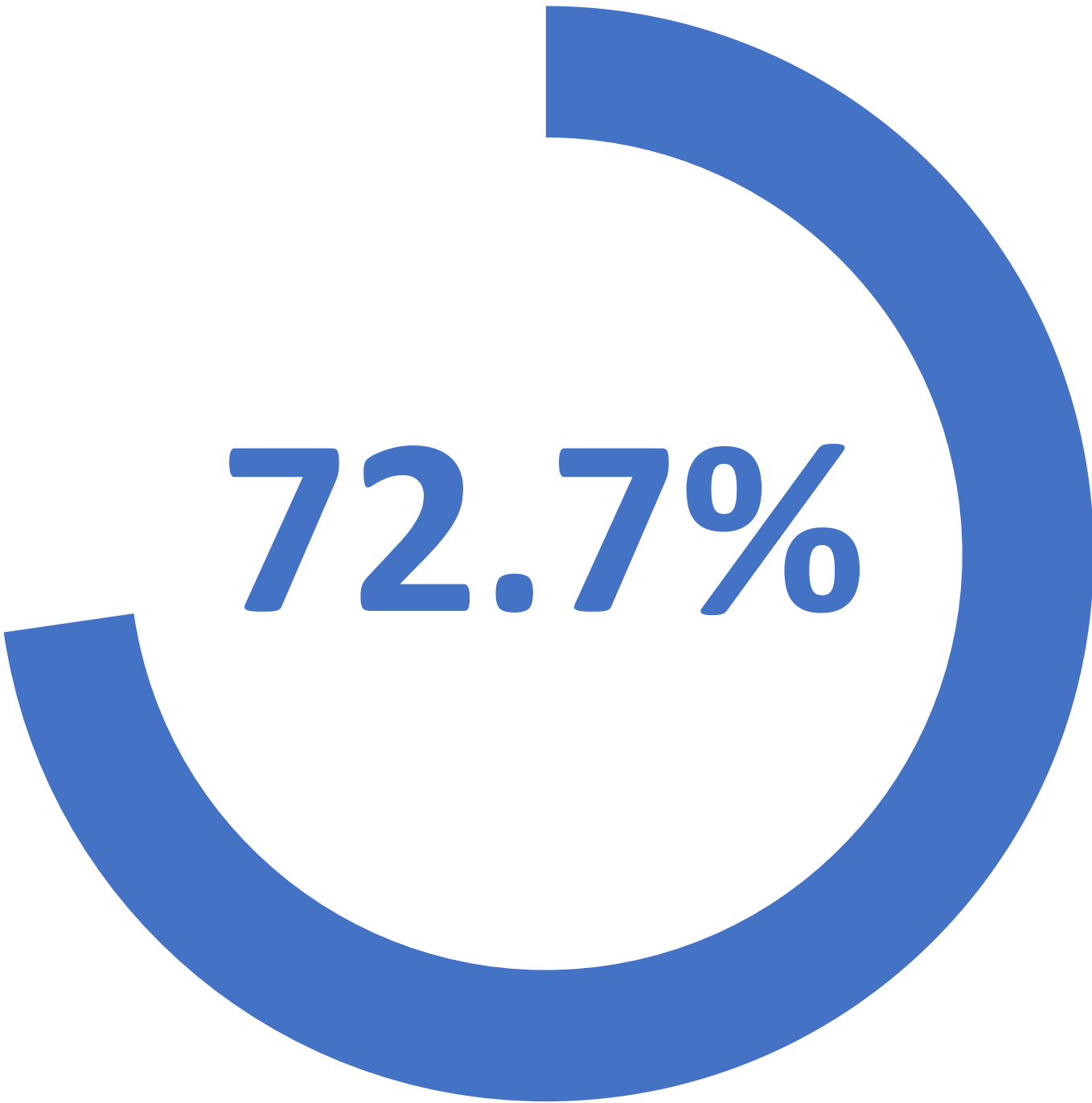
POTENTIAL VISITORS

Respondents who reported they are gathering information for a planned or potential trip

Comparisons made to:
State Tourism Office Website
User & Conversion Study



Reasons for Visiting Website



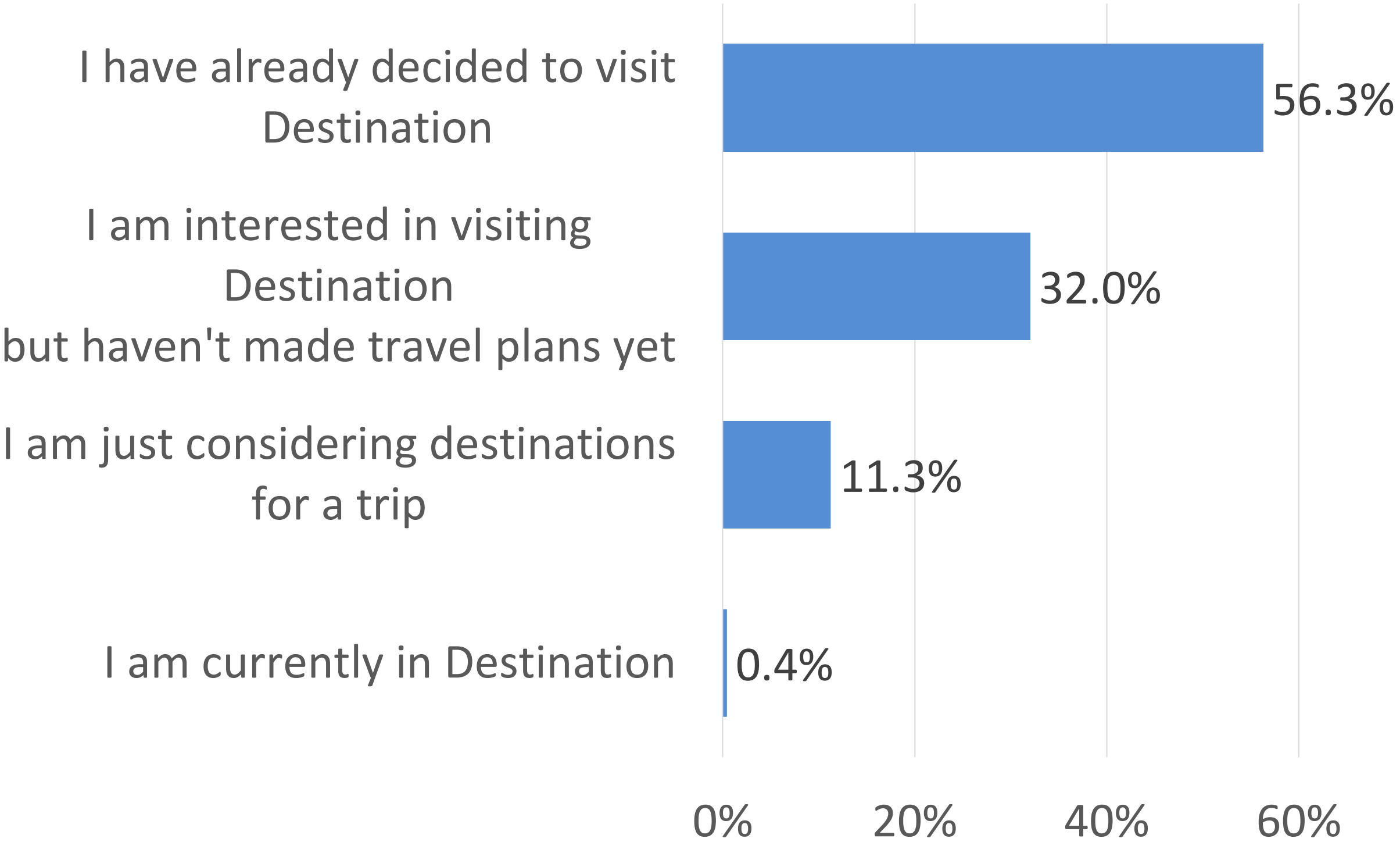
I am gathering information for a planned, rescheduled or potential trip to Destination

Compared to **70.1%** of all out-of-state respondents of the STO Website User & Conversion Study

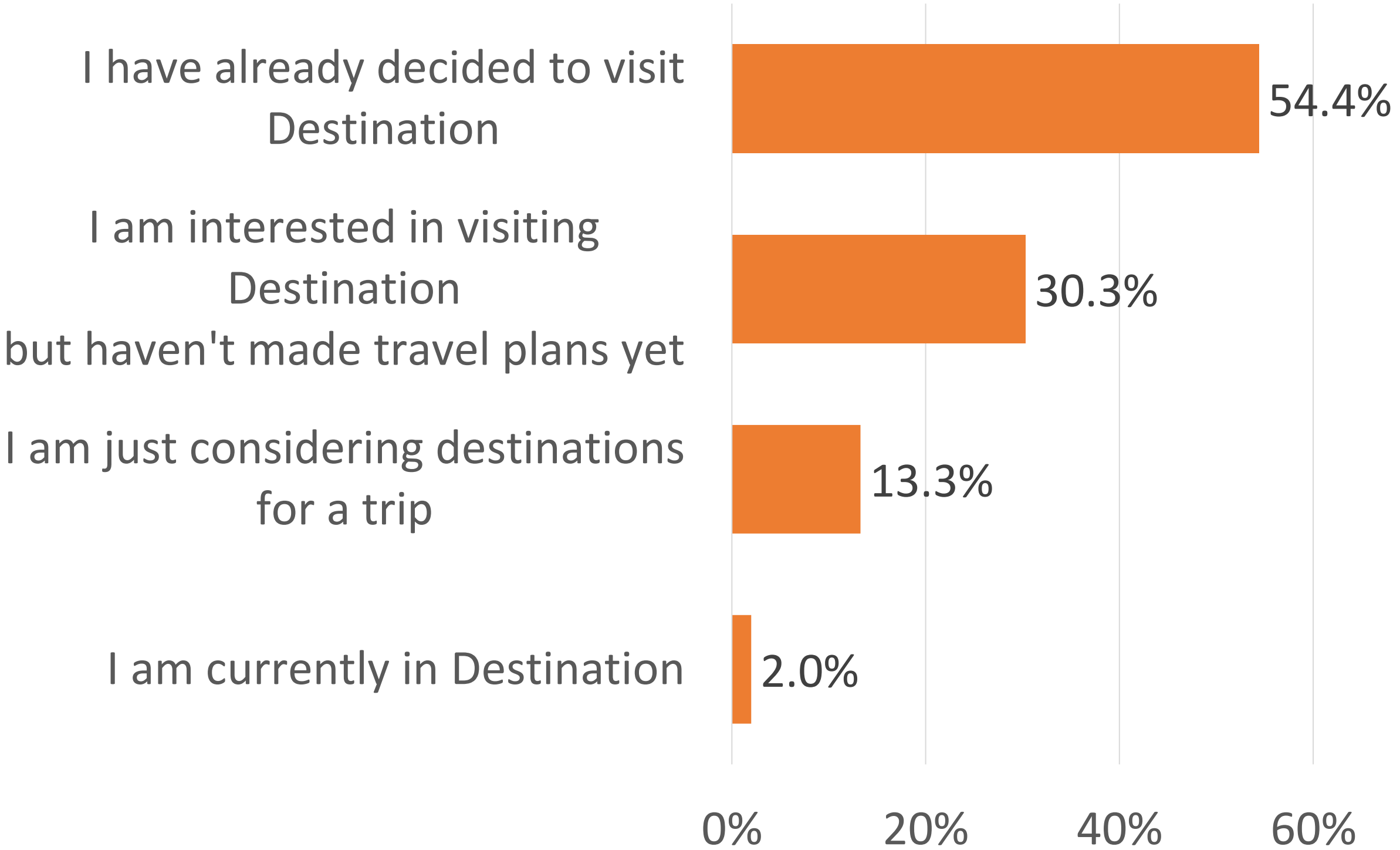
Which of the following best describes you? (Select one)
Base: 8,420

Point in Travel Planning Process

DMO Website Importance Study

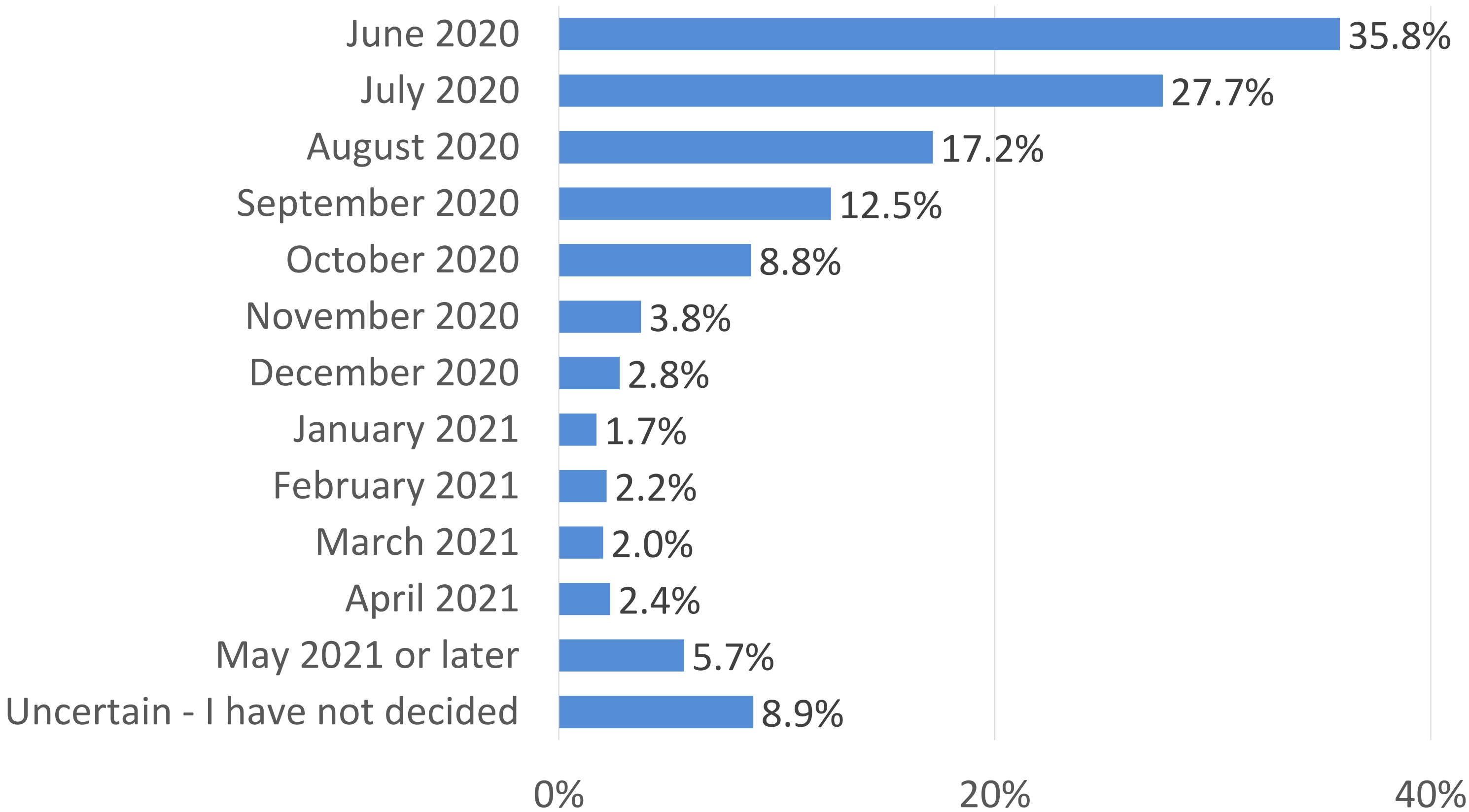


STO Website User & Conversion Study



Which best describes where you are in the trip planning process? (Select one)
Base: 6,173

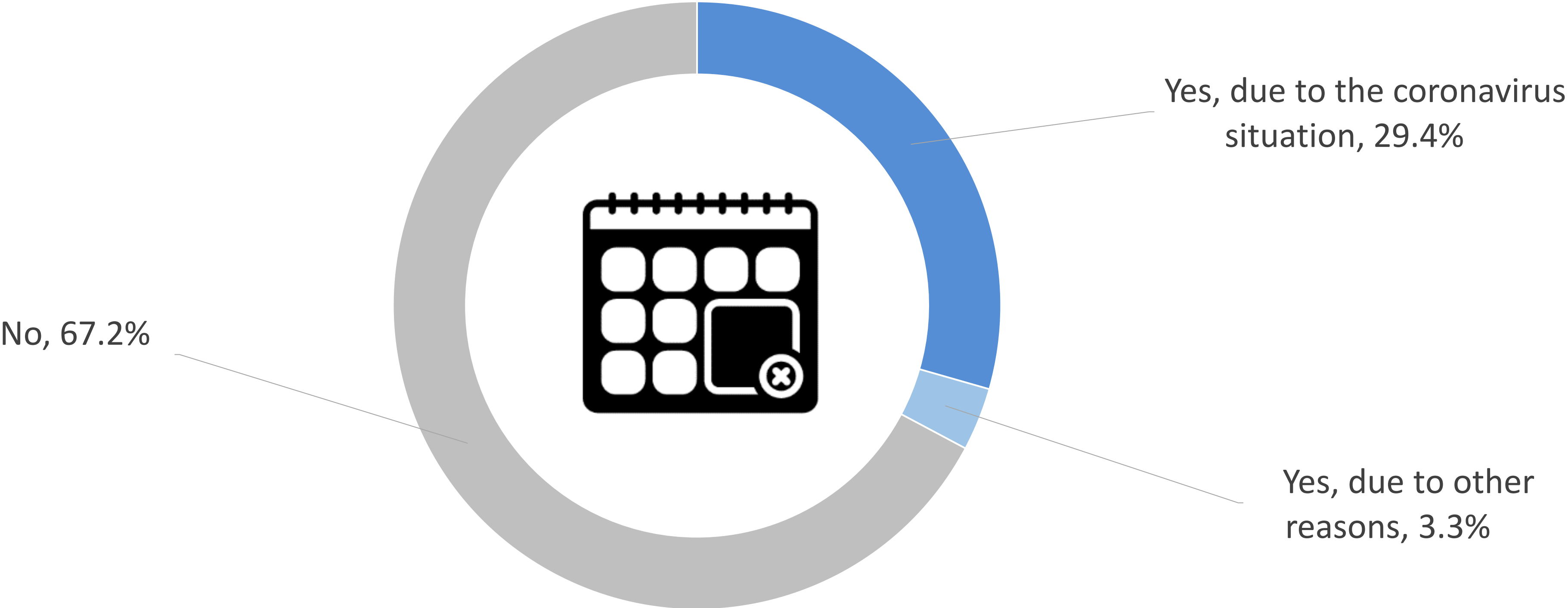
Intended Month of Trip



When are you most likely to take a trip to Destination? (Select all that apply)

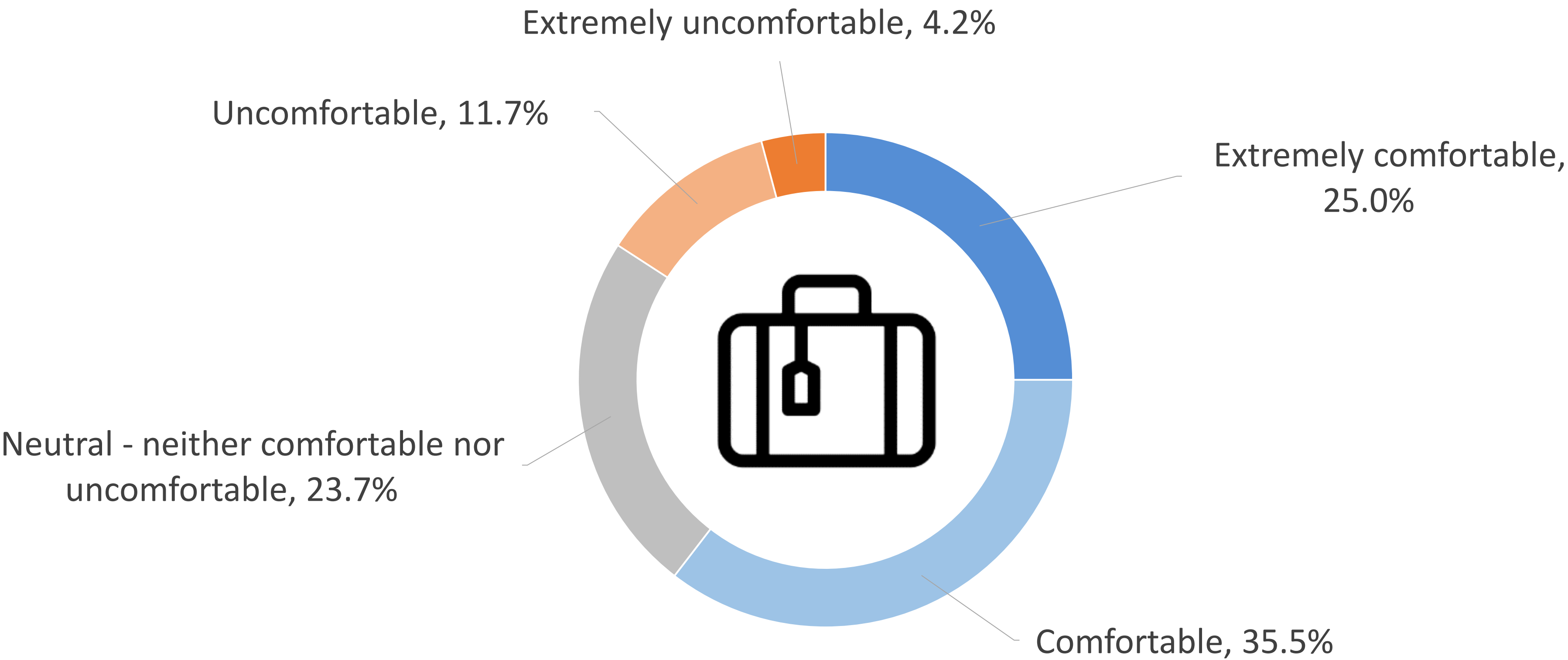
Base: 7,306

Trip Previously Postponed/Rescheduled



Was this trip you are planning or considering taking to Destination previously postponed/rescheduled?
Base: 7,318

Comfortable Traveling



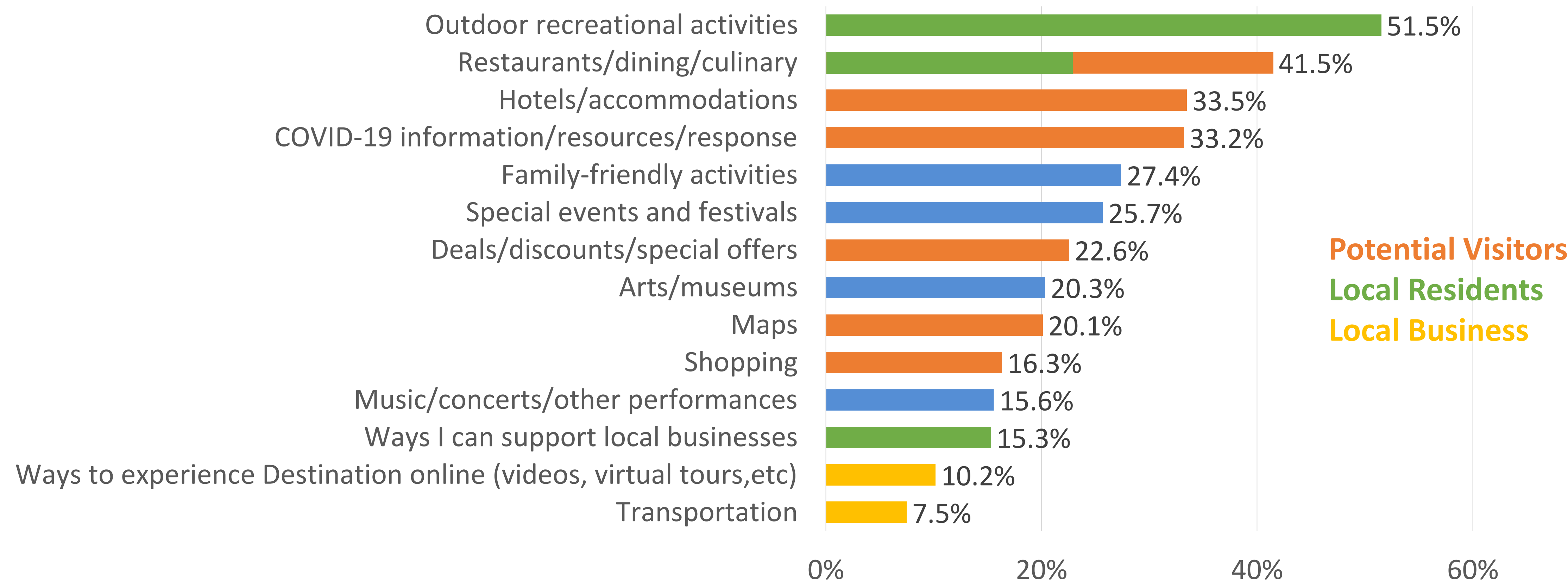
How comfortable do you feel about traveling to Destination right now?
Base: 7,320

Demographic Profile – Potential Visitors

	Potential Visitors
Female	56.6%
Male	37.8%
Average Age	54.2
Single	18.8%
Married	72.1%
Has Children under 18	19.6%

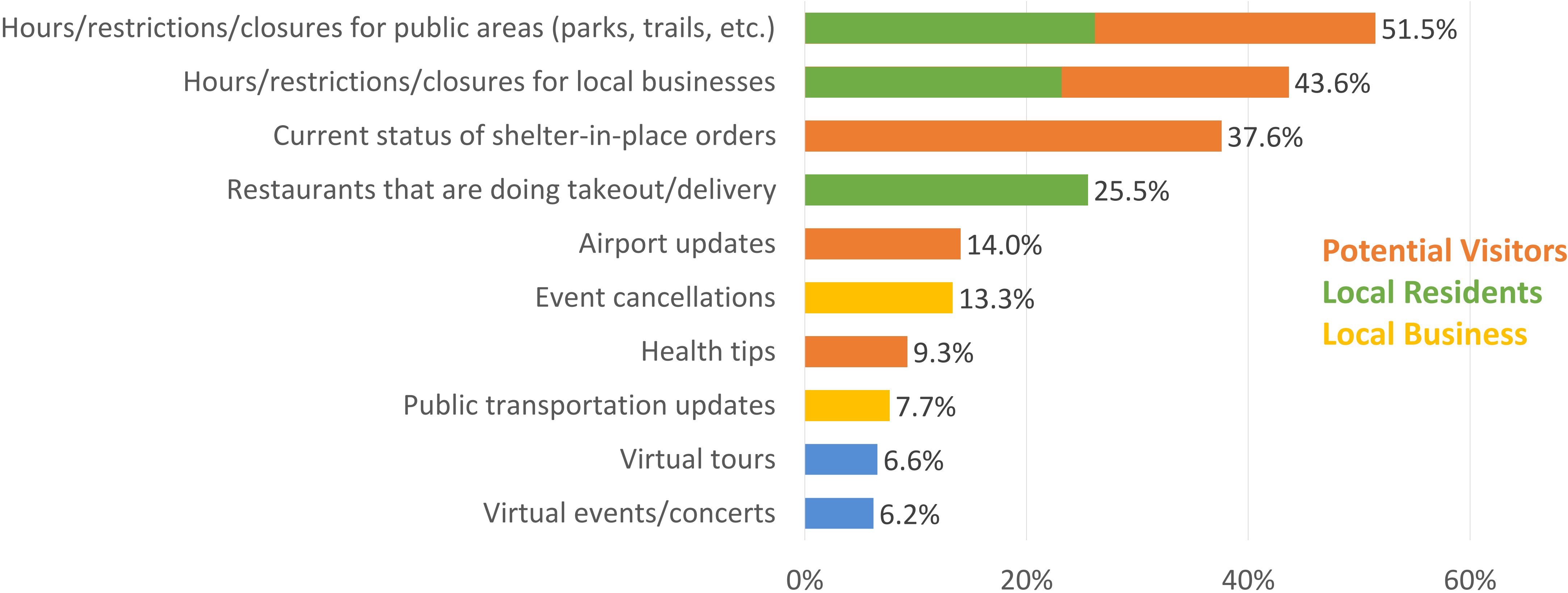
INFORMATION SOUGHT & VALUE AND IMPORTANCE METRICS

Information Sought On Website



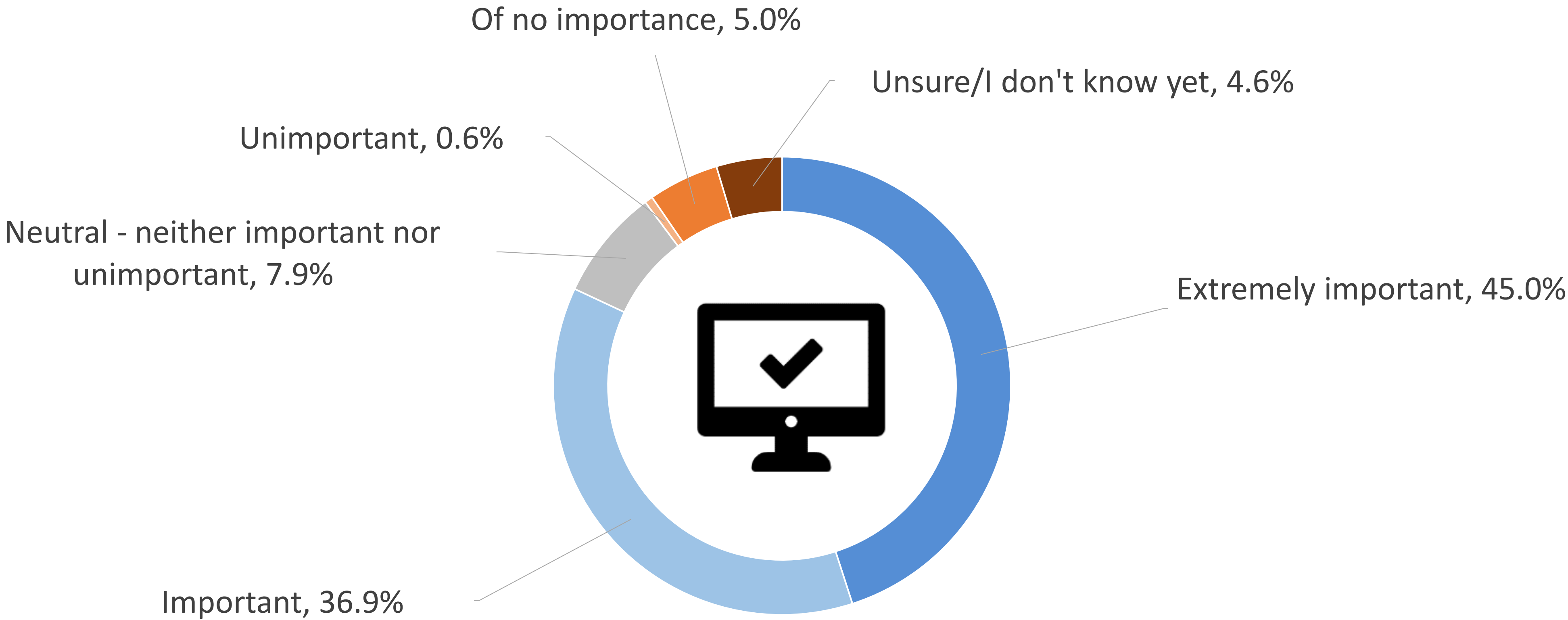
Which of the following types of Destination information are you most interested in? (Select all that apply) Base: 12,637

COVID-19 Information Sought



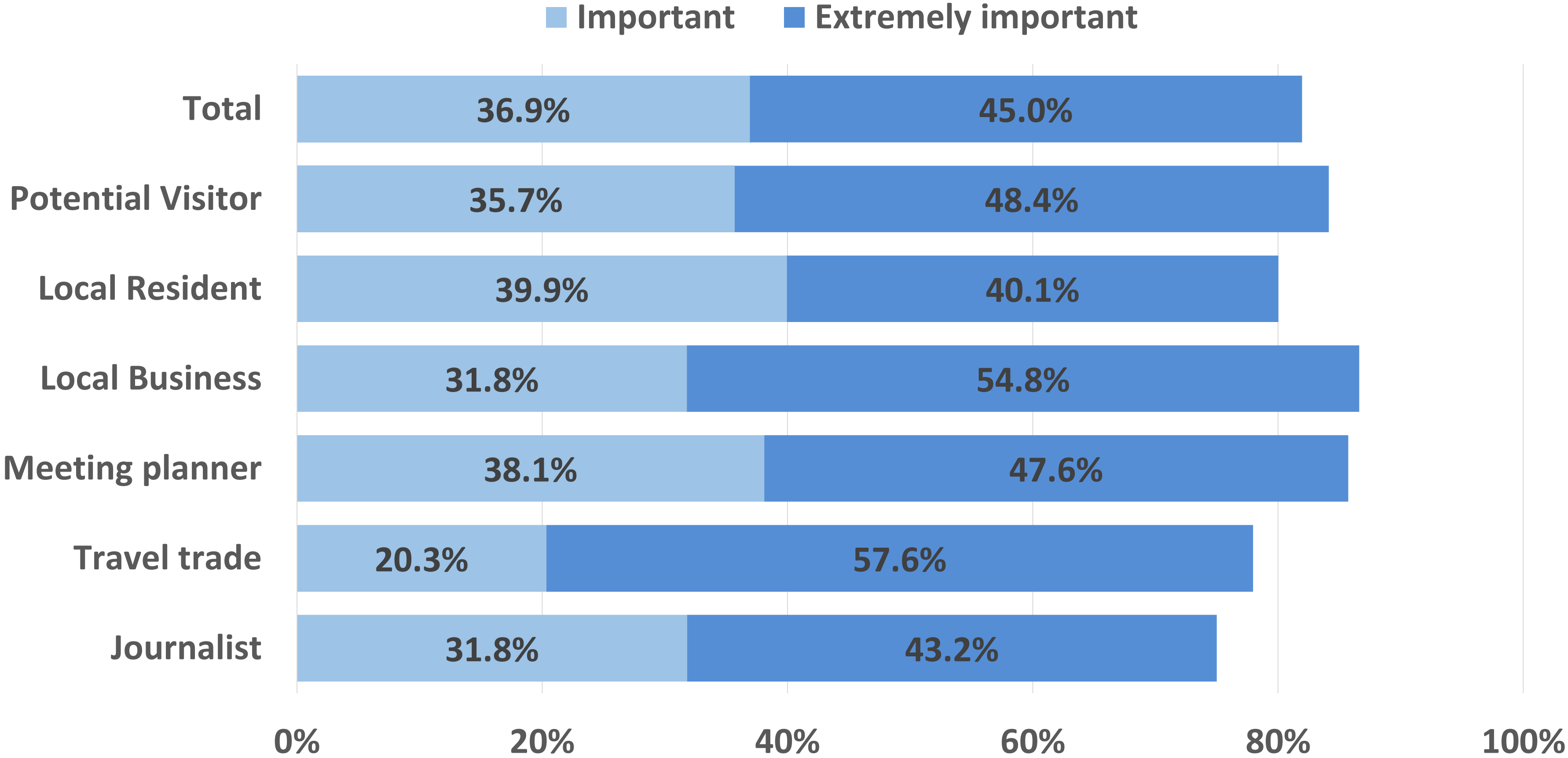
Thinking about information/resources related to COVID-19, which of the following types of information, if any, are you specifically looking for? (Select all that apply) Base: 12,637

Importance of DMO Website



How important is it that our organization offer the information available on this website?
Base: 12,619

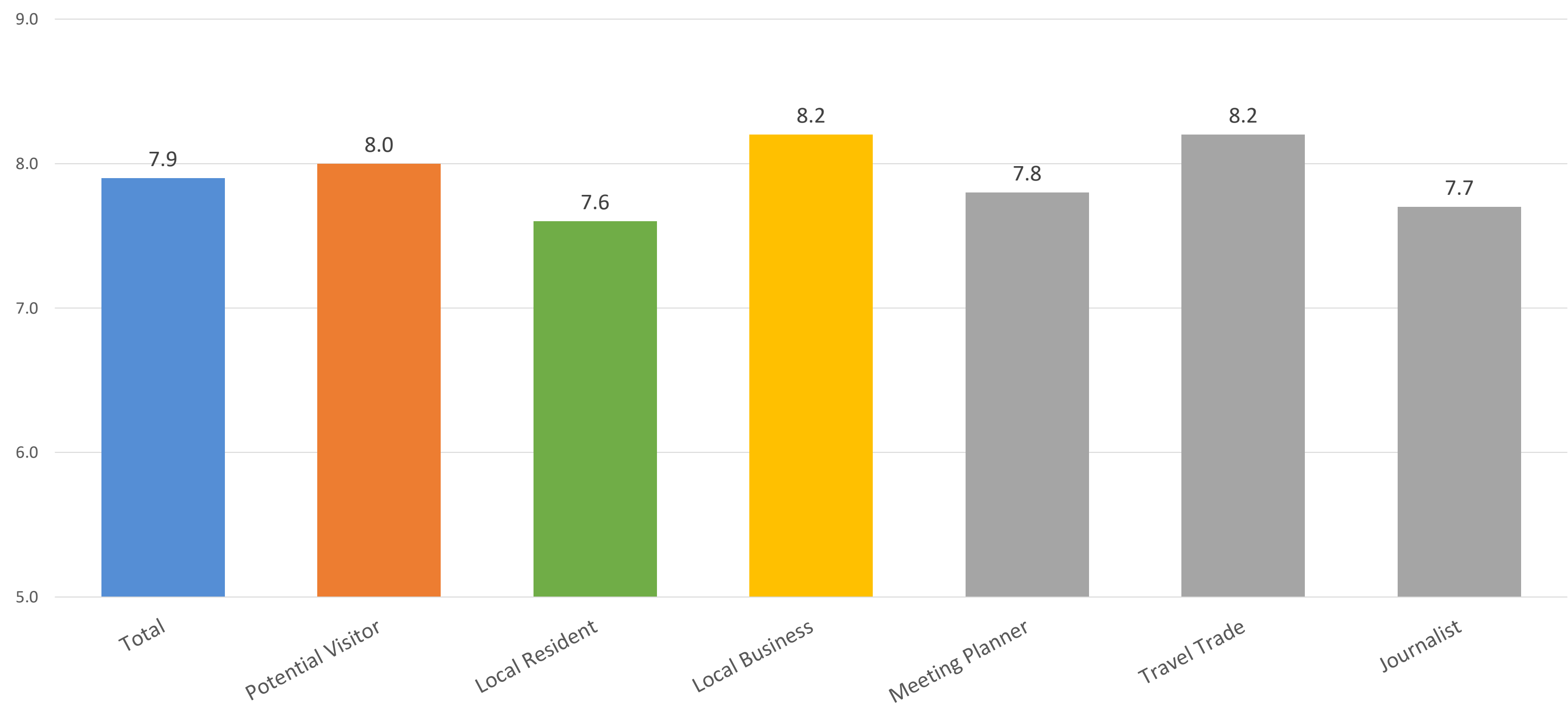
Importance of DMO Website



How important is it that our organization offer the information available on this website?

Base: 12,619

Value of DMO Website – 10 pt. Scale



How valuable of a resource do you consider this website?
Base: 12,619

A potted plant with long green leaves and a vintage camera on a wooden surface.

TOP 5 KEY TAKEAWAYS

1. **DMO Websites are highly valued and very important during this crisis.** Over 80% of all audiences say it is “Important” or “Extremely important” that DMOs offer the information available on their sites.
2. DMO websites are **attracting potential visitors who are looking to travel in the near-term.** An emphasis should be placed on highlighting activities and experiences available from now to two months out.
3. While over half of potential visitors on DMO sites have made their destination decision, **4-in-10 are still in a state of potential influence.**
4. **Local Residents** are turning to DMO sites for guidance and ways to enjoy their local communities right now and are **most interested in content related to outdoor recreation**
5. COVID-19 information is critical for all audiences, especially **Potential Visitors who are most often looking for up-to-date operational hours/restrictions and closures of public areas and local businesses**

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

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ROI

THIS YEAR ▼ 32.8876
▲ 42.9841

First quarter
Jan-Mar

Second quarter
Apr-Jun

Third quarter
Jul-Sep



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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