

Coronavirus Trave Sentiment Index

Presentation of Findings Week of June 1st



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.

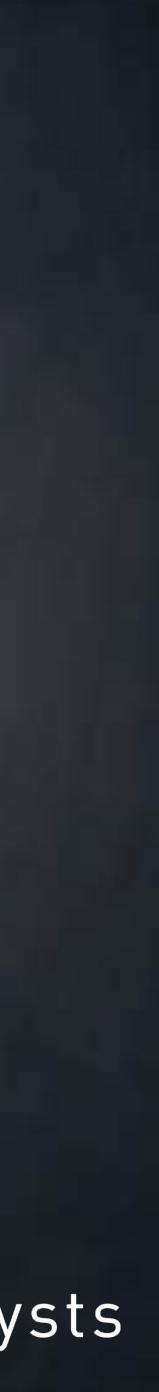




Please consider purchasing, subscribing or donating to support this research <u>https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/</u>

THANKYOU so much to our clients and partners who have





Presentation deck and webinar recording available on our website:

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







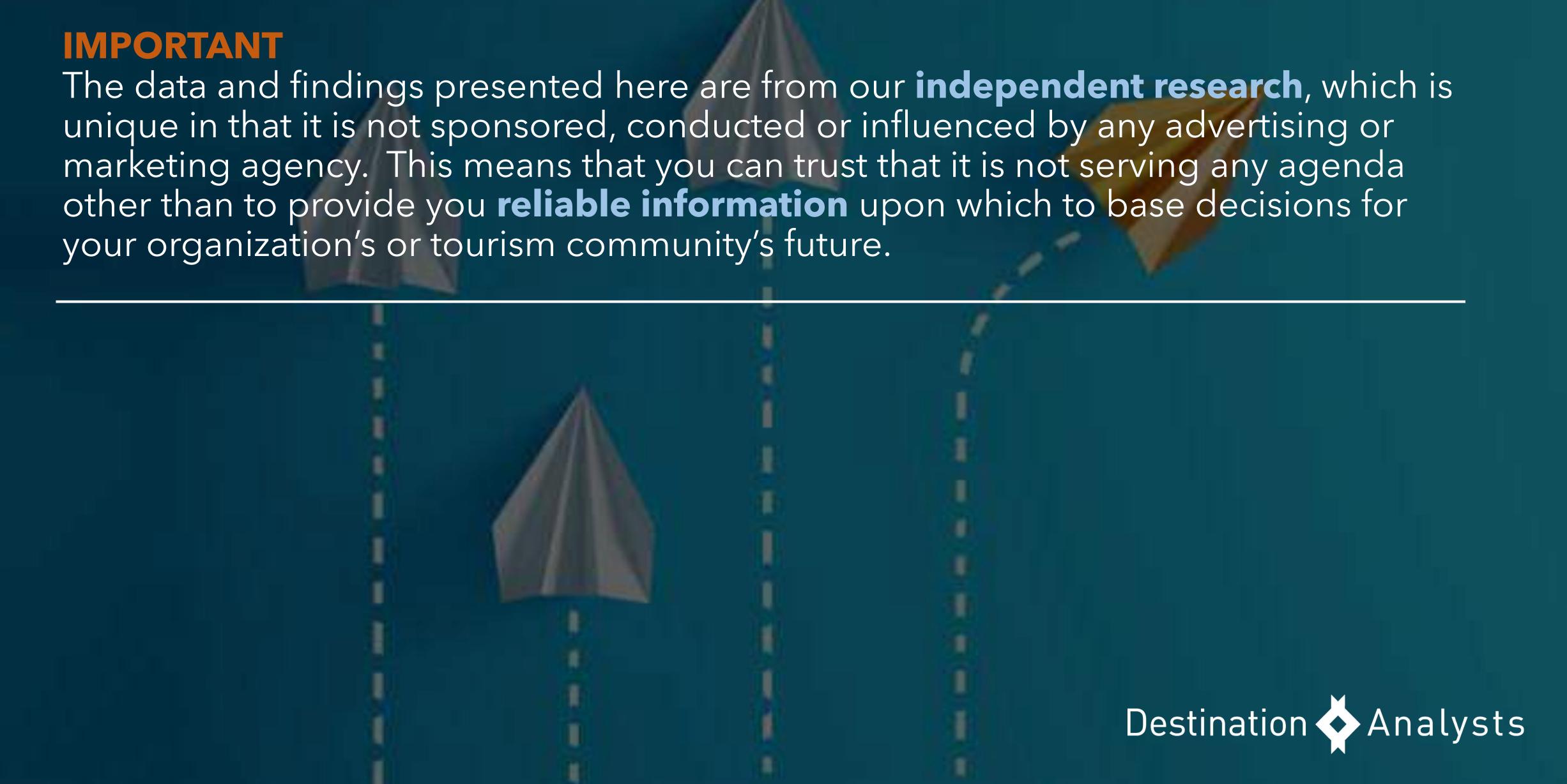
Research Overview & Methodology

- 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 12 data (fielded May 29th-31st) 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



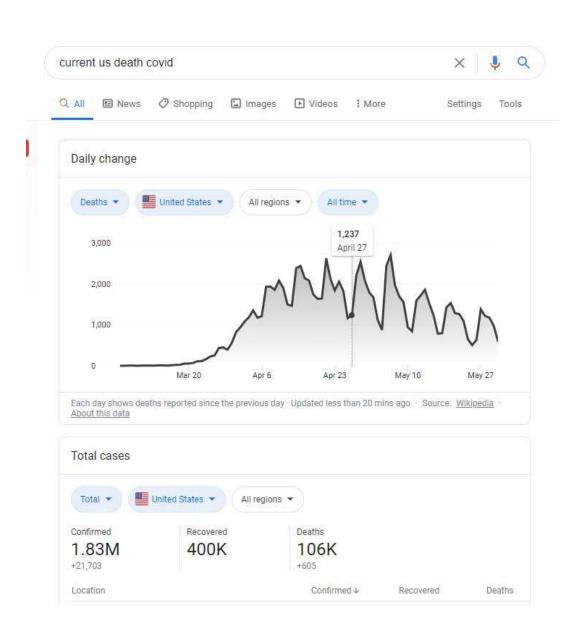


A cluster of coronavirus cases was reported in Arkansas after a swim party



By Melissa Alonso and Nicole Chavez, CNN () Updated 5:29 PM ET, Sun May 24, 2020





George Floyd protests go international as demonstrations break out across the world

Demonstrators gathered outside the U.S. Embassies in London and Berlin.

By Guy Davies June 1, 2020, 2:51 AM + 6 min read



Violent protests create turmoil across the nation Police and protesters clash in cities around the nation.

A successful SpaceX shuttle launch is exactly what 2020 needed



Mike D. Sykes, II May 30, 2020 4:57 pm

Finally, some good news to talk about for a bit.









PHOTOGRAPH BY ROBIN UTRECHT, HOLLANDSE HOOGTE/REDUX

I CORONAVIRUS COVERAGE I

Is it safe to travel now? It depends.

Here are the best practices for getting on the road without endangering your health –or anyone else's.

BY JOHANNA READ PUBLISHED MAY 28, 2020

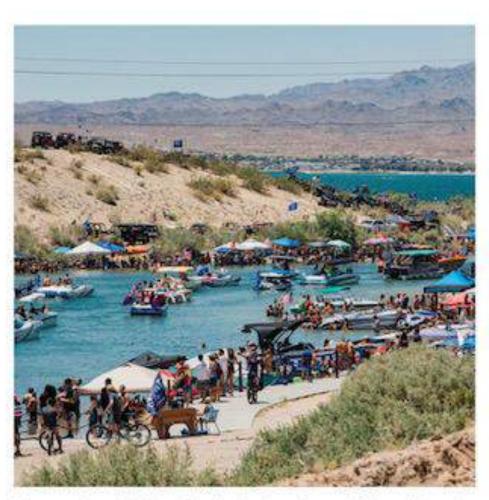
Although many restrictions are still in place.

THE WALL STREET JOURNAL. 🗚 🍈

CORONAVIRUS Free Resources	► VIDE0	
BACK TO WORK QSA	GOING OUTSIDE SAFELY	CANIGET SICK AGAIN?

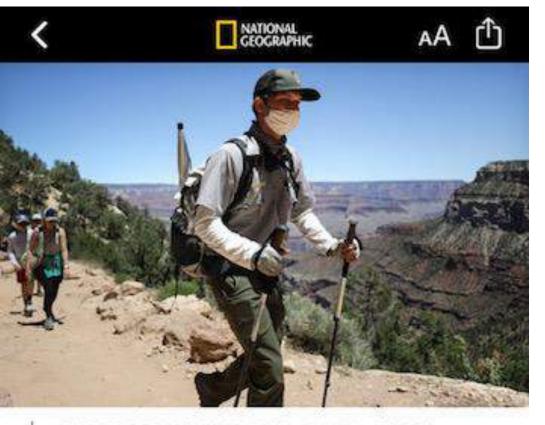
Vacation Towns Reopen From Lockdowns, and the Locals Are Torn

Influx of tourists to places like Lake Havasu, Ariz., is a boon to the economy, but residents worry about Covid-19 outbreaks



Thousands of visitors flocked to beaches and joined a boat parade that mixed a tribute to the military and President

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PHOTOGRAPH BY MARIO TAMA, GETTY IMAGES

Summer at America's national parks kicks off with long lines and crowded trails

Despite efforts to limit visitors, some national parks are getting slammed. So what's next?

BY KRISTA LANGLOIS PUBLISHED MAY 30, 2020



cosmopolitan_lv Resurface from Your New Normal Don't skip summer. Dive back in, with rooms available June 4th. Get 20% off your stay and a \$50 pool credit.

How Safe 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)

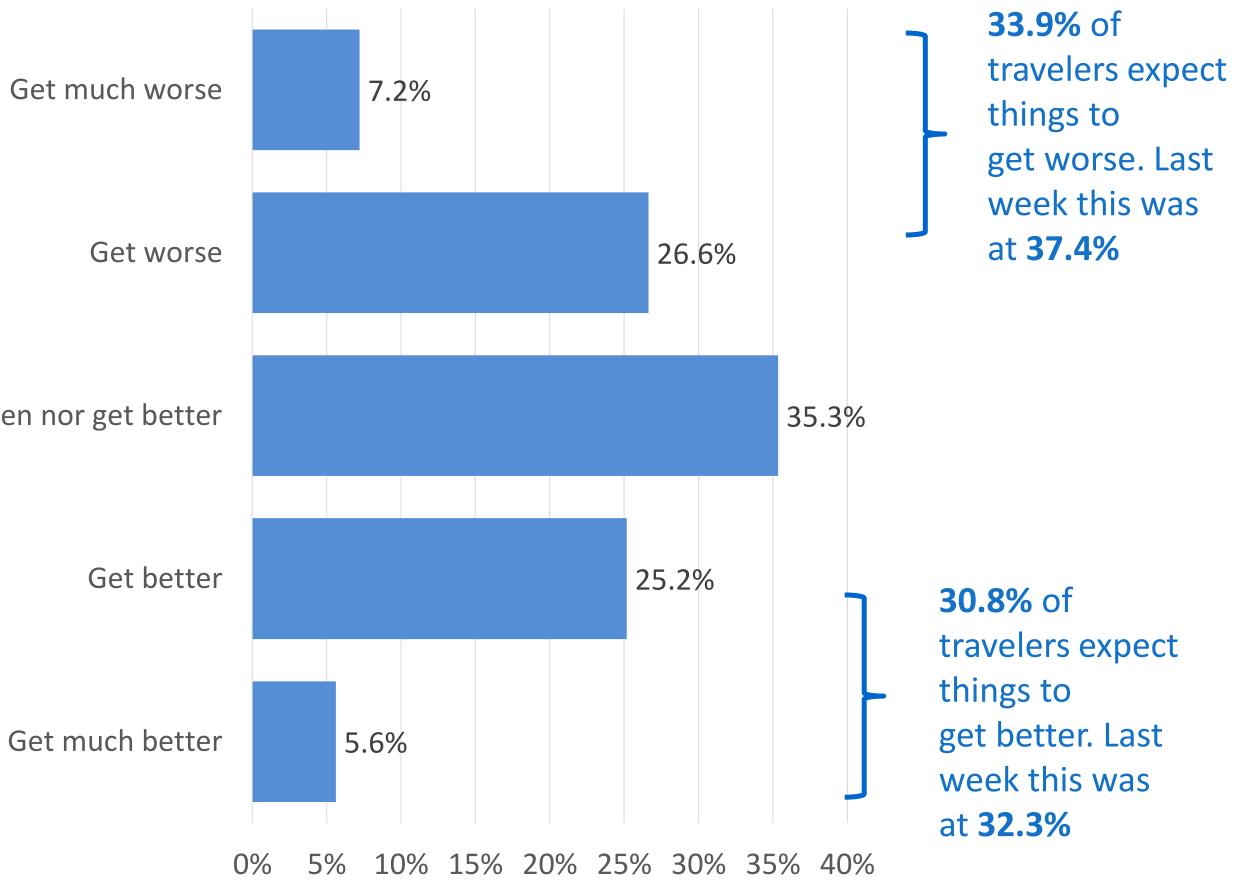
In	the	nex	tm	onth	the	coronavirus	
sit	tuati	on v	will				

Neither worsen nor get better

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

Get much better



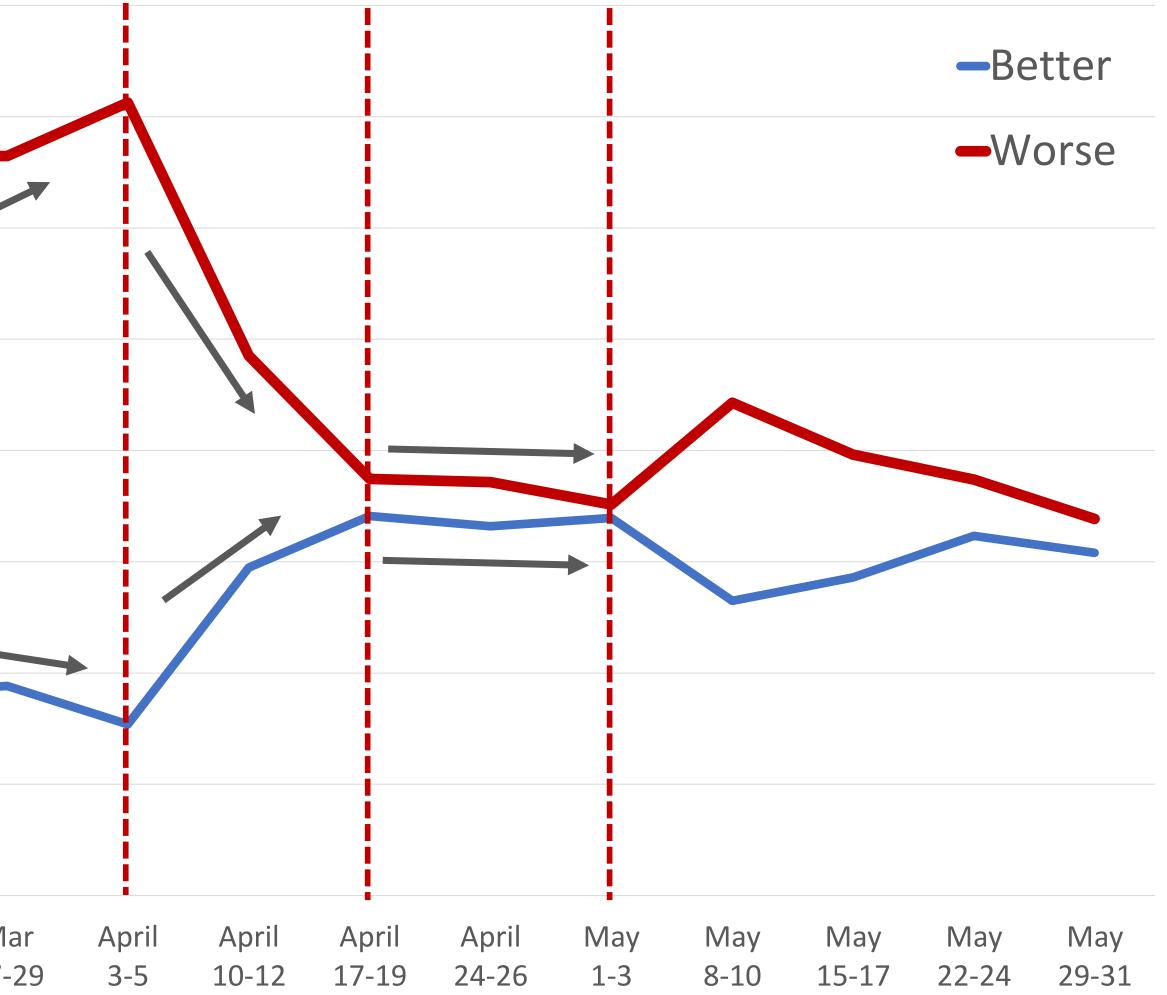


Expectations for the Coronavirus Outbreak

Oursetion, In the NIEVE	80.0%	"Worse" or
Question: In the NEXT MONTH, how (if at all) do you	00.070	"Much worse"
expect the severity of the coronavirus situation in the	70.0%	
United States to change? (Select one)	60.0%	
In the next month the	50.0%	
coronavirus situation will	40.0%	
	30.0% —	
	20.0%	
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1223 and 1,257 completed surveys collected March 13-15, 20- 22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, and May 22-24, 2020)	10.0% —	"Better" or "Much better"
	0.0%	

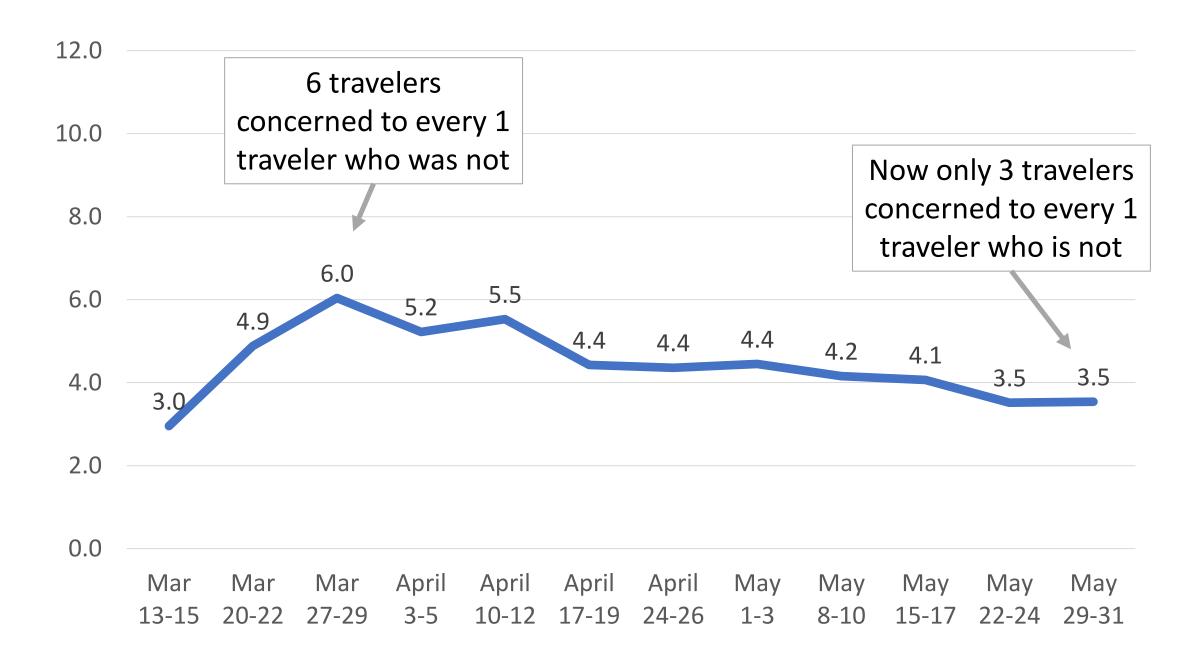
Mar	Mar	M
13-15	20-22	27-





Ratio of Concerned to Unconcerned Travelers: Safety

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

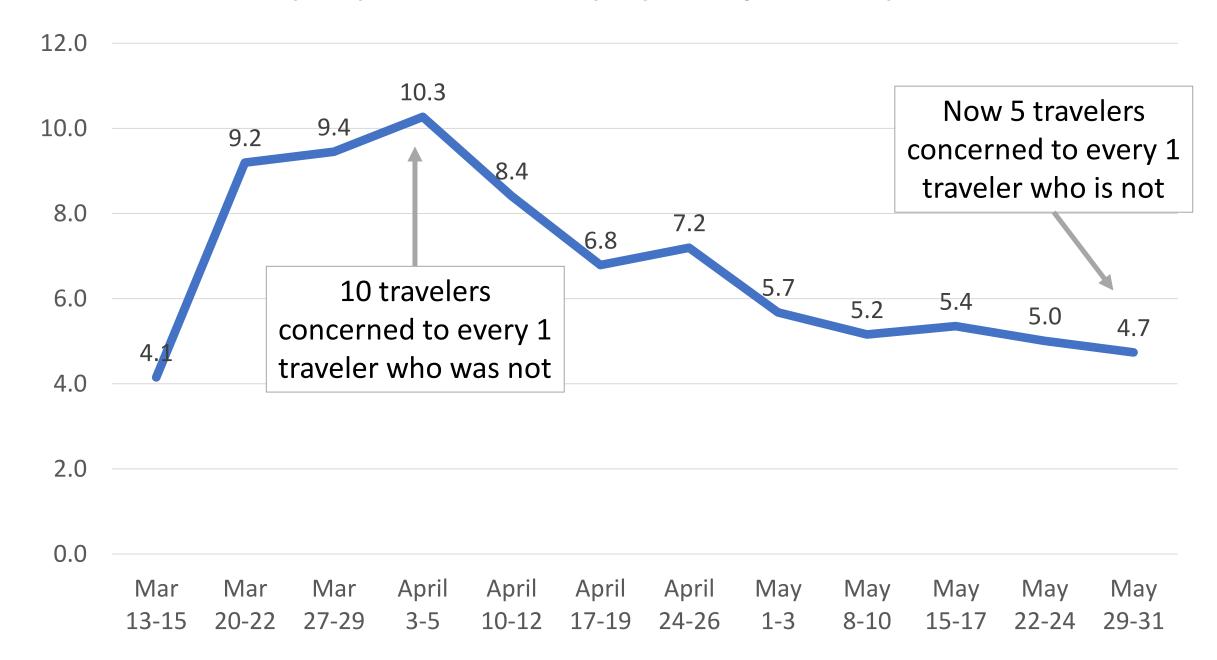


Question: Thinking about the current coronavirus situation, in general, how concerned are you Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below) **PERSONALLY** about contracting 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 and 1257 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 and 29-31, 2020)

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



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

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



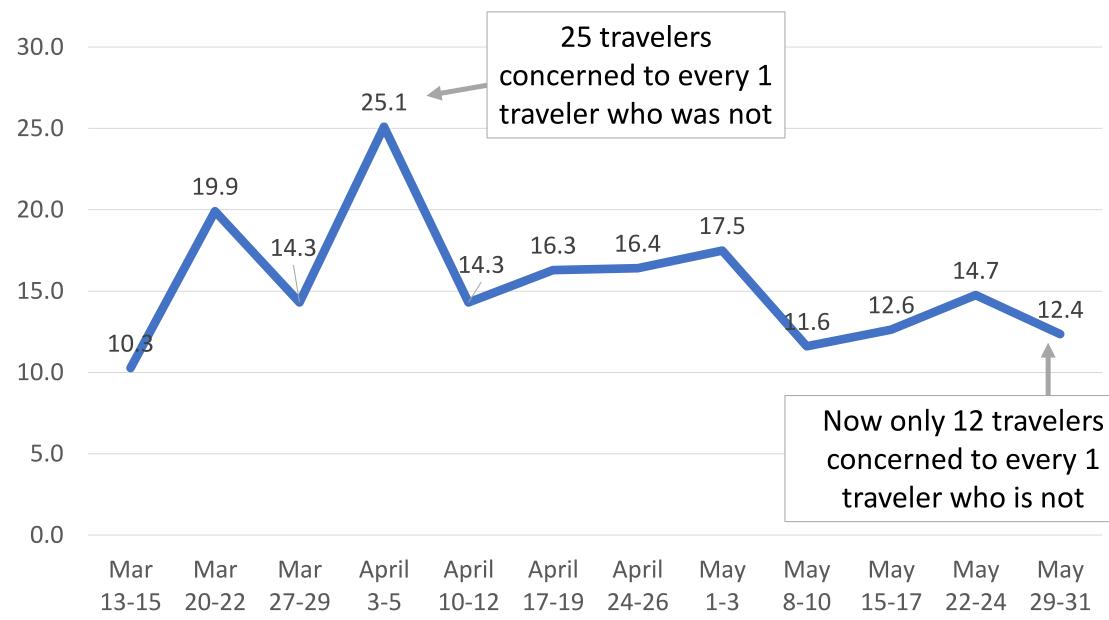
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES? (Please answer using the scale below)



27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)

National Economy

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

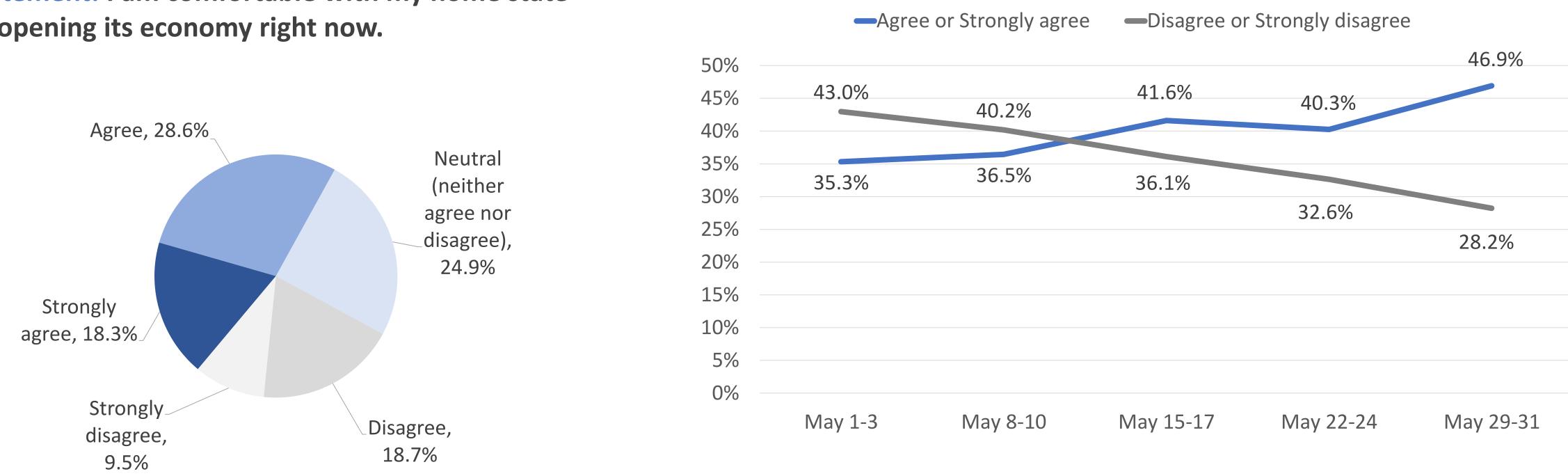


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

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.



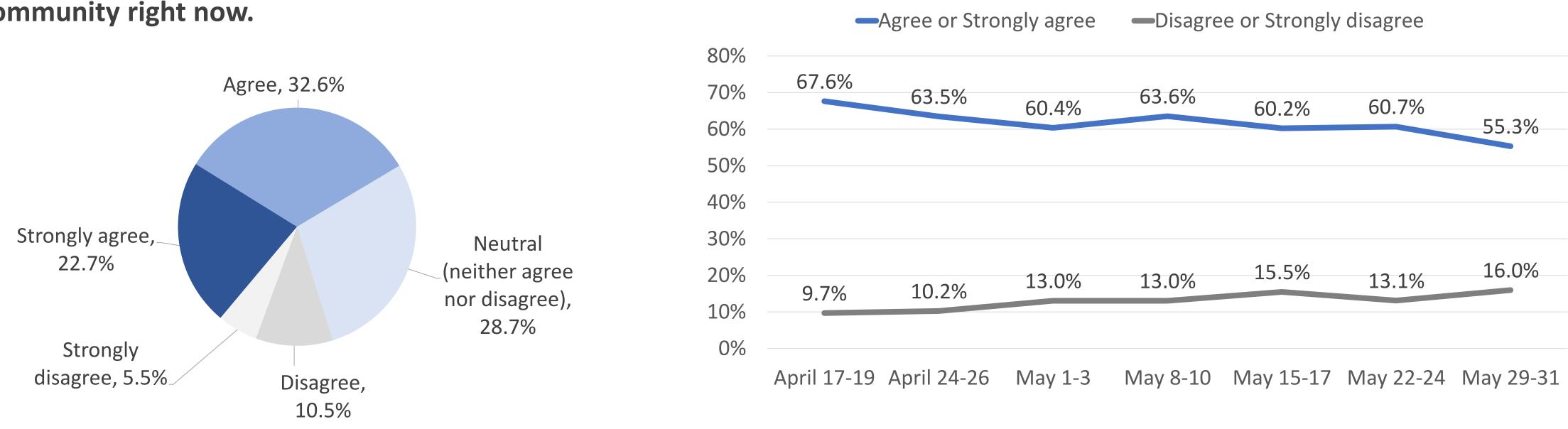
(Base: All respondents, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



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 and 1,257 completed surveys. Data collected April 17-19,24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)

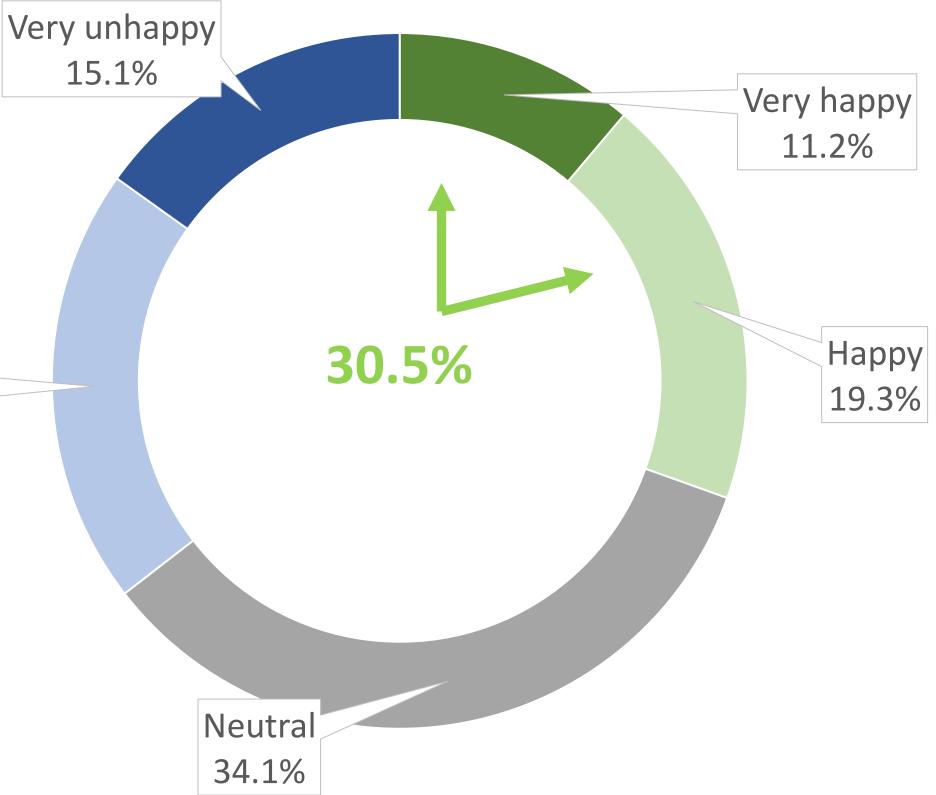


Feelings About Advertisements for Travel to their Home Communities

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

(Base: All respondents 1,257 completed surveys. Data collected May 29-31, 2020) Unhappy 20.4%

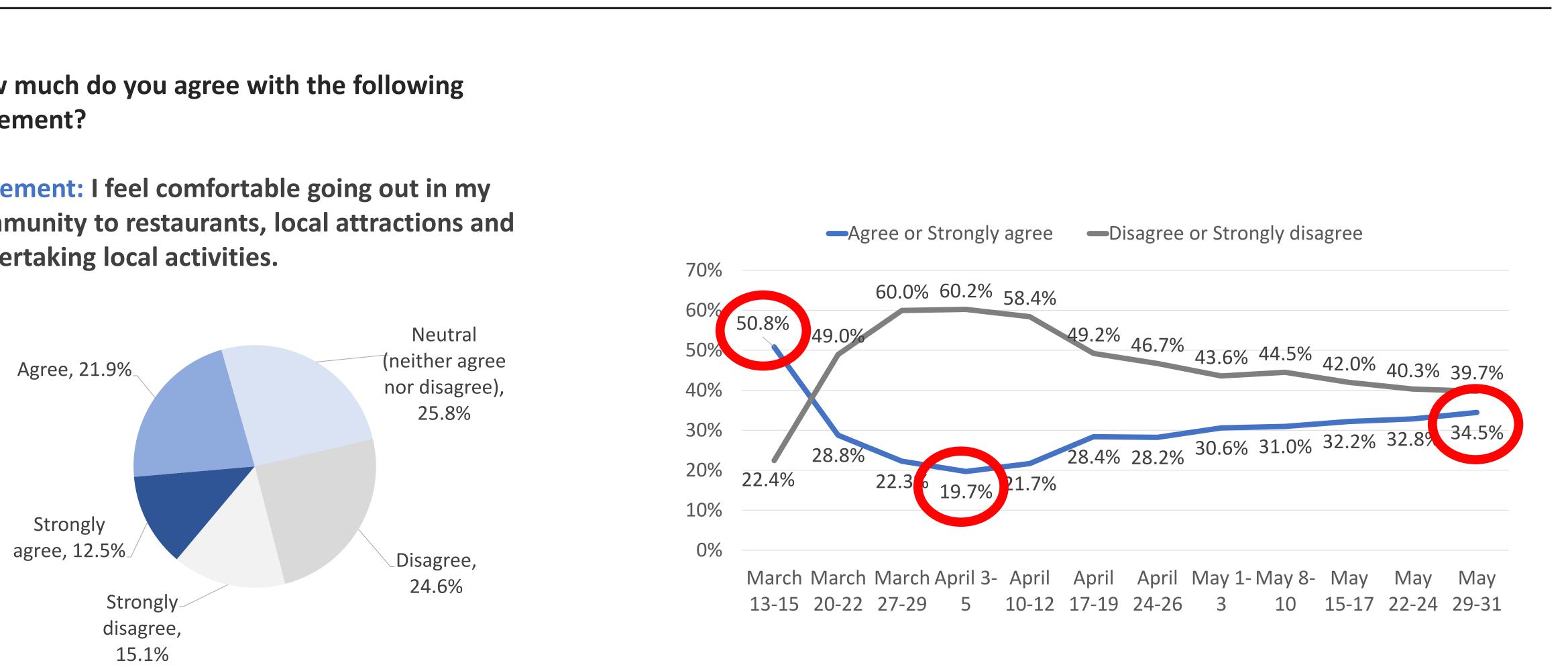




Comfort Enjoying Home Community

How much do you agree with the following statement?

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



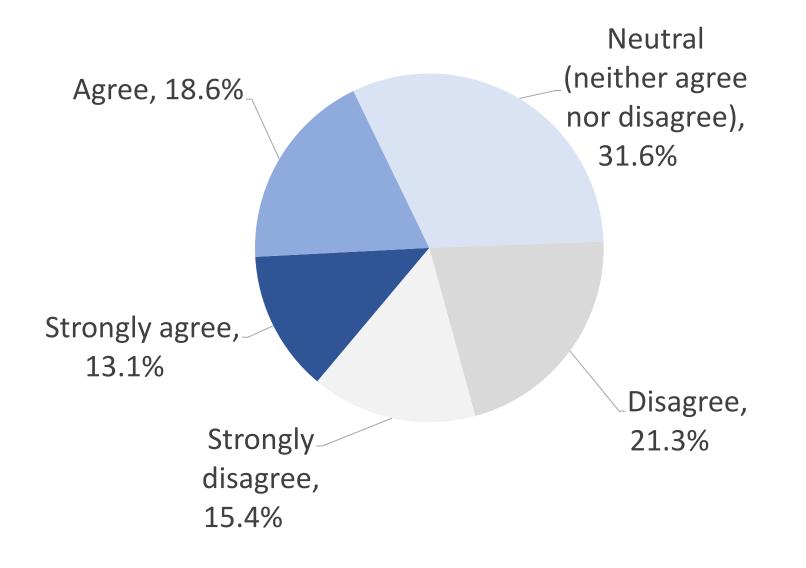
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



Won't Travel Without Vaccine

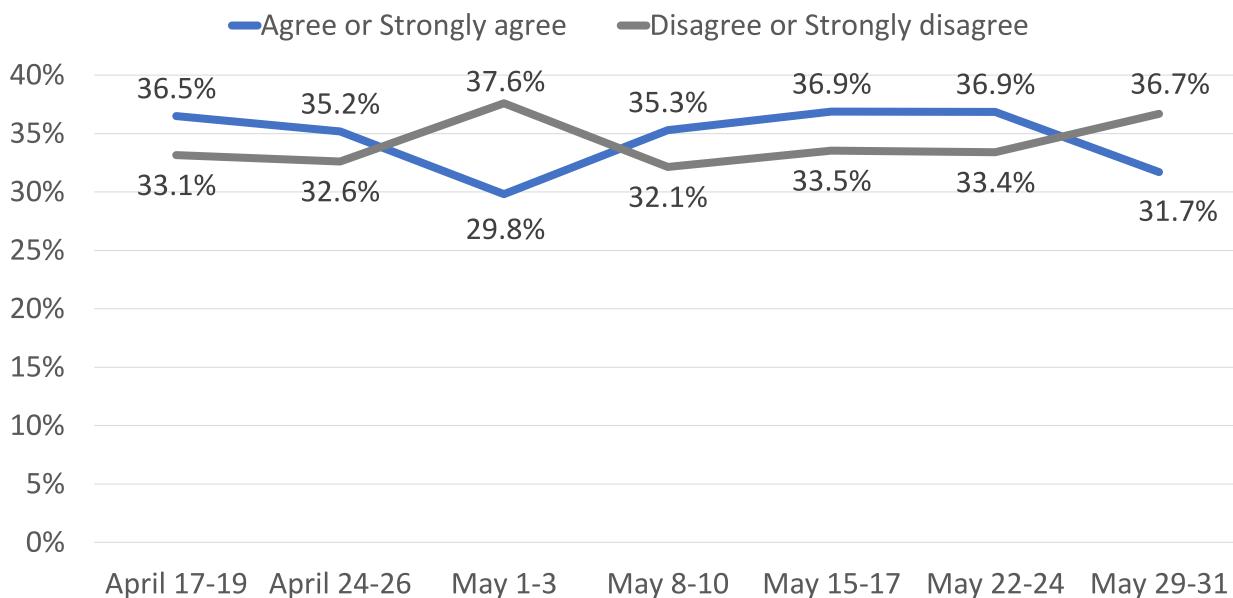
How much do you agree with the following statement?

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 and 1,257 completed surveys. Data collected April 17-19,24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)





Perceived Safety of Travel Activities (Wave 12)

Question: At this

(Base: Wave 12 data. All

completed surveys. Data

collected May 29-31, 2020)

respondents, 1,257

moment, how safe would you feel doing each type of travel activity?

Traveling on a cruise line Intercity bus travel (Greyhound, Bolt, Megabus, etc. Sporting events - Large venue **Traveling outside the United State** Attending a performance (music, theater, movie, etc. Attending a conference or conventio Train travel (intercity travel - e.g., AMTRAK Sporting events - Small venue Traveling on a commercial airline Traveling in a taxi/Uber/Lyf Visiting a museum, aquarium, landmarks or other indoo **Traveling for business reason** Visiting amuse. park, zoo, gardens, parks or outdoo Staying in an Airbnb or home renta Dining in a restauran Visiting friends and relative Non-team outdoor recreation (biking, hiking, etc.



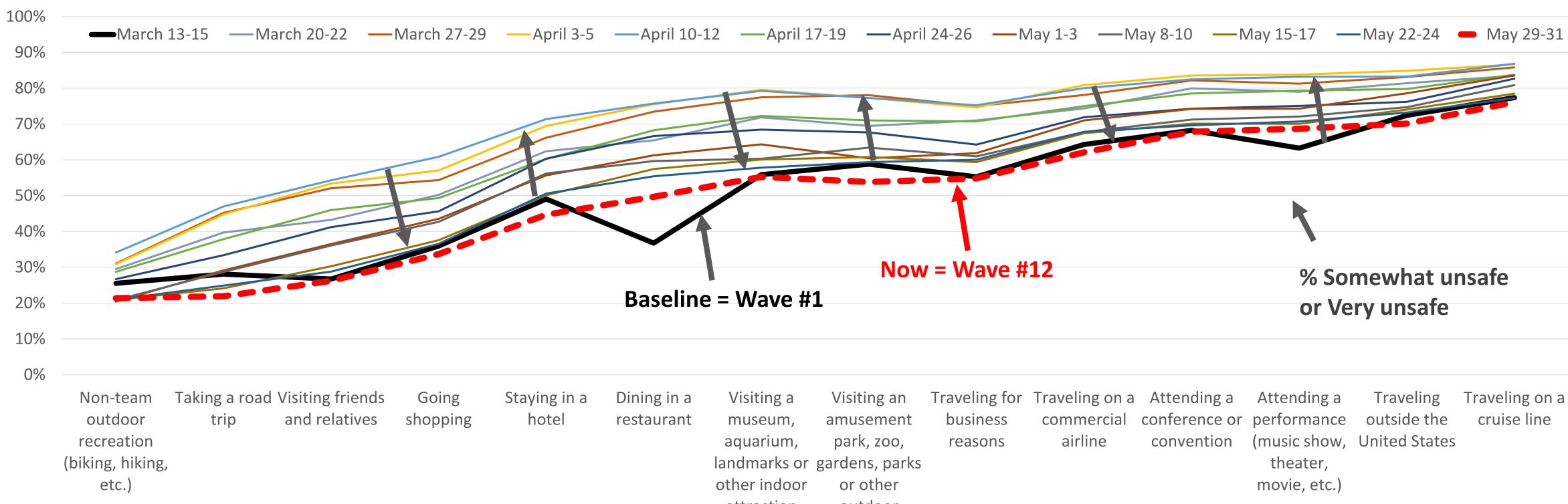
Wave 12 (Collected May 29-31)

Go to a casine Staying in a hote Going shoppin Taking a road tri

ne	16.5%	6					59.6%		
c.)		29.8%	6				42.	8%	
Ie		24.5%					46.0%		
es		24.9%					45.3%		
c.)		26.9%					41.7%		
10	21	L.6%				46	5.3%		
on		26.6%					41.2%		
К)		30.09	%				33.5%		
ue		26.9%				35	5.8%		
ne		25.5%				36.	6%		
/ft		29.9%	6			30).2%		
or		28.0%				27.3%)		
ns		26.9%				27.9%			
or		26.8%				27.0%			
al		25.7%				27.9%			
nt		29.8%	6			19.9%			
el	-	24.1%			20.6%			Somew	vhat unsafe
ng	2	2.8%		10.8%	6			Very u	nsafe
es	17.6	%	8.6%						
rip	14.4%	-	7.5%						
c.)	11.0%	10.3	3%						
0	% 10)%	20%	30)%	40%	50%	60	% 70%
0			/ / /				007		



Perceived Safety of Travel Activities (Waves 1-12 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 and 1,223 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 and 22-24, 2020)



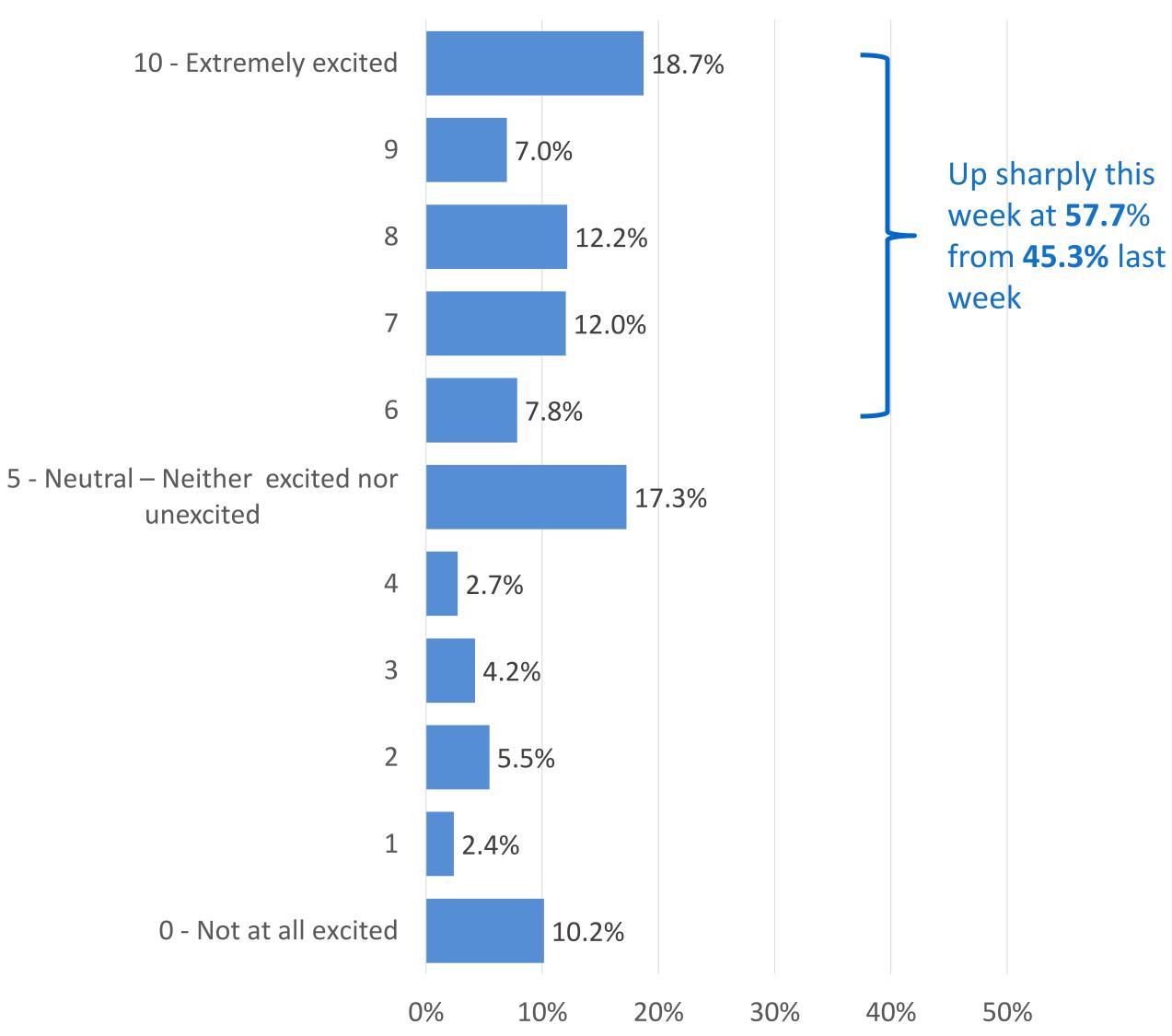
Traveling on a cruise line outdoor attraction attractions

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, 1,257 completed surveys. Data collected May 29-31, 2020)



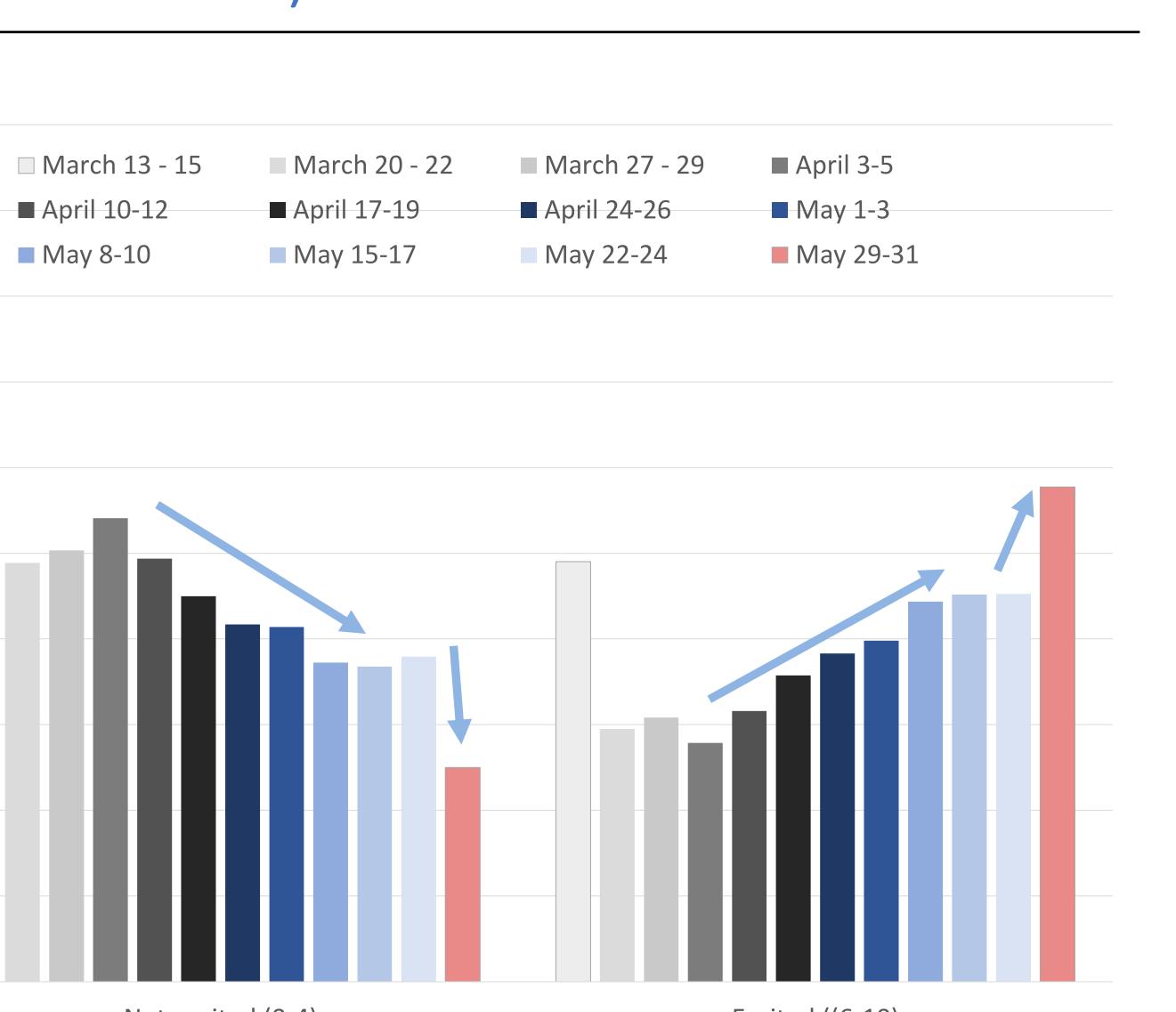


Excitement to Travel Now (Excited vs. Not Excited)

	100%	
Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in	90%	
the next month.	80%	
How excited would you be to go? (Assume	70%	
the getaway is to a place you want to visit)	60%	
	50%	
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1212, 1,223 and 1,257 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 and 29-31, 2020)	40%	
	30%	
	20%	
	10%	
	0%	







Not excited (0-4)

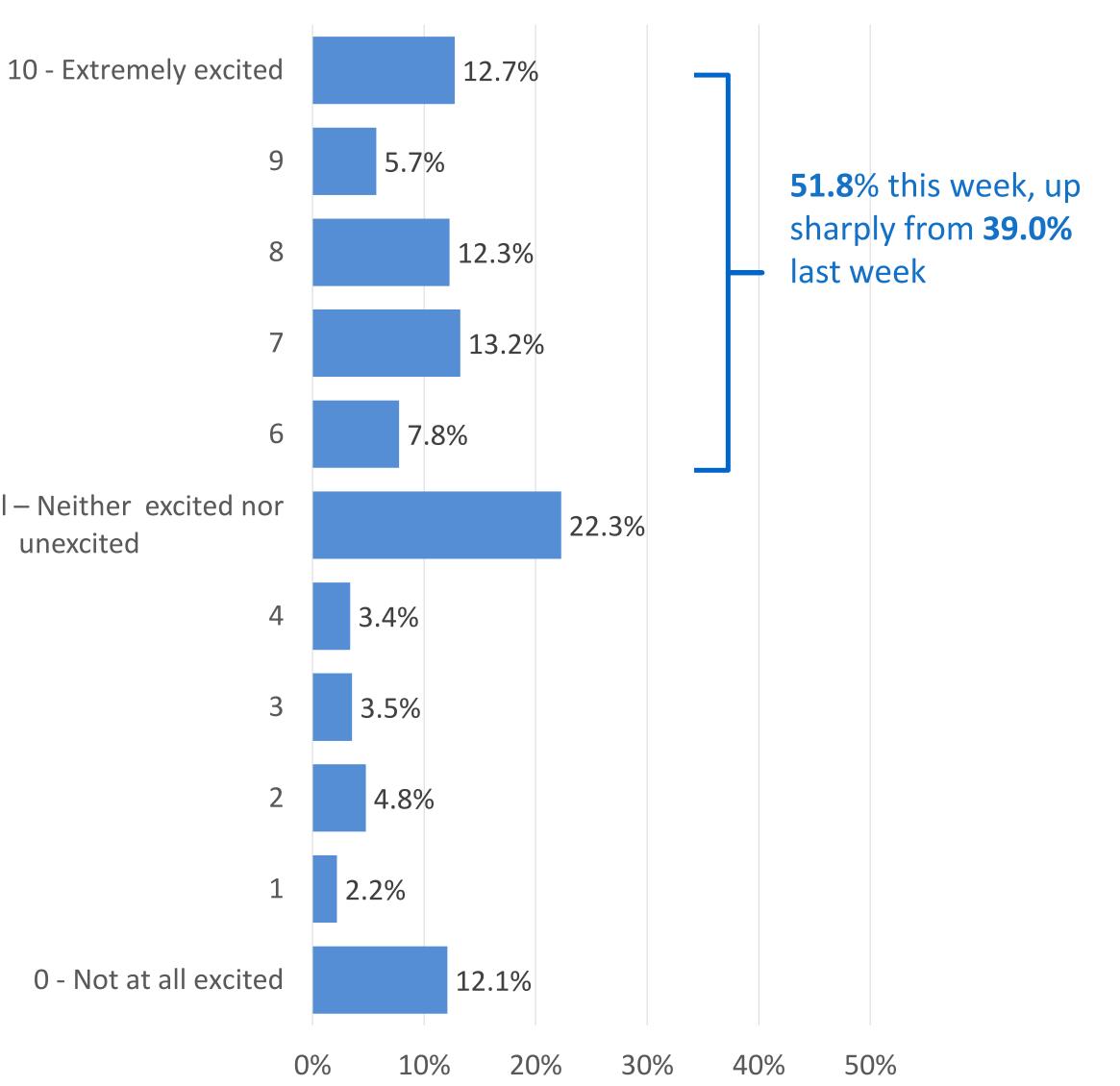
Excited ((6-10)

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

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

> 5 - Neutral – Neither excited nor unexcited



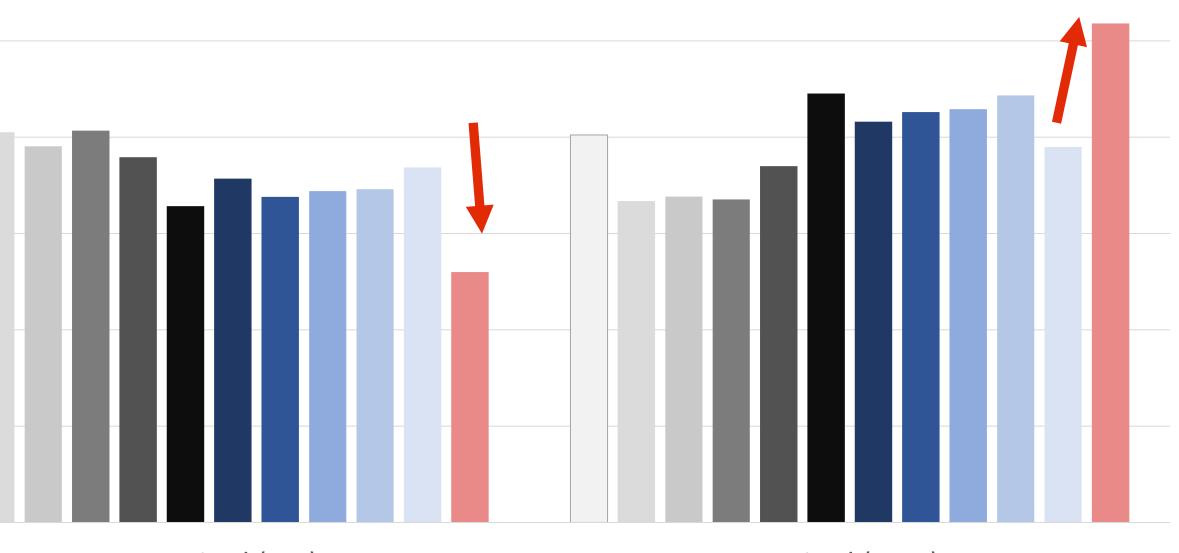


Openness to Travel Information (Excited vs. Not Excited)

Question: At this moment, how excited	100%	
are you in learning about new, exciting travel experiences or destinations to	90%	
visit?	80%	
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5,	70%	
10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)	60%	
	50%	
	40%	
	30%	
	20%	
	10%	
	0%	



March 13 - 15	March 20 - 22	March 27-29	April 3-5
April 10-12	■ April 17-19	April 24-26	May 1-3
May 8-10	May 15-17	May 22-24	May 29-31



Not excited (0-4)

Excited (6-10)

SAFE TRAVELS



KEYTAKEAWAYS

 This was a good week for many key travel metrics tracked in this study, including excitement and openness to inspiration

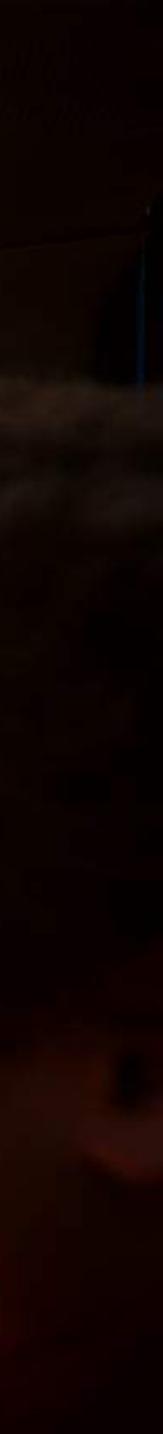
 There is greater optimism about the pandemic's course, and the proportion of travelers feeling concern for their safety and economic issues continues to improve

The perceived safety of individual travel activities, in many cases, has improved to be better than when this research began 3 months ago

Americans are getting increasingly comfortable with tourism to their own communities

How We Will Trave

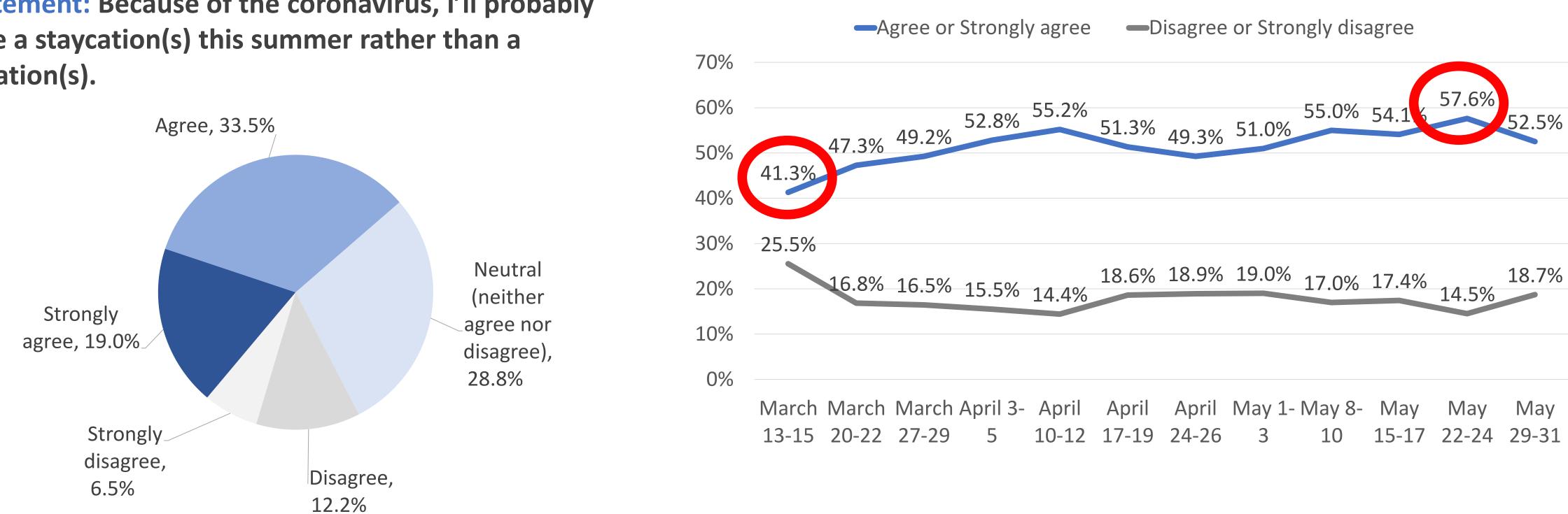
100



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).



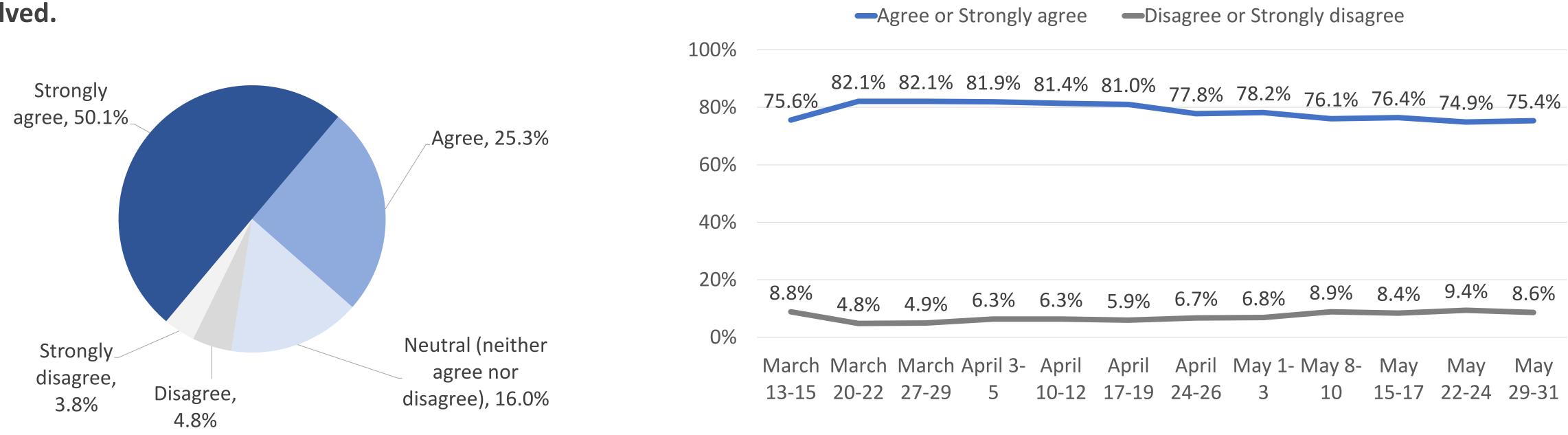
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



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.



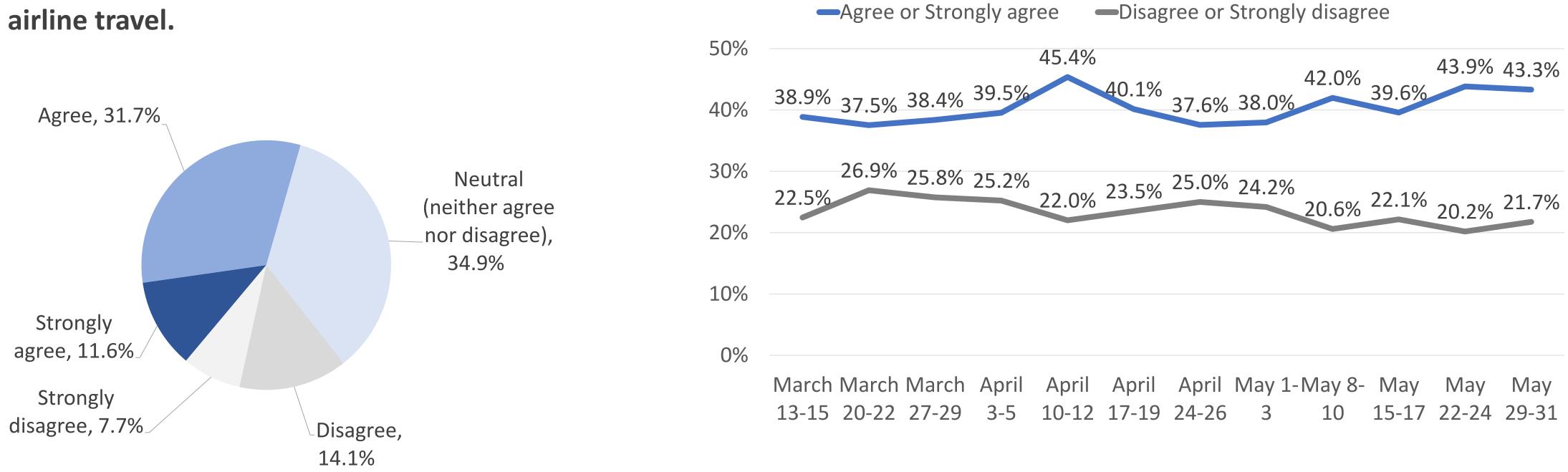
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



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.



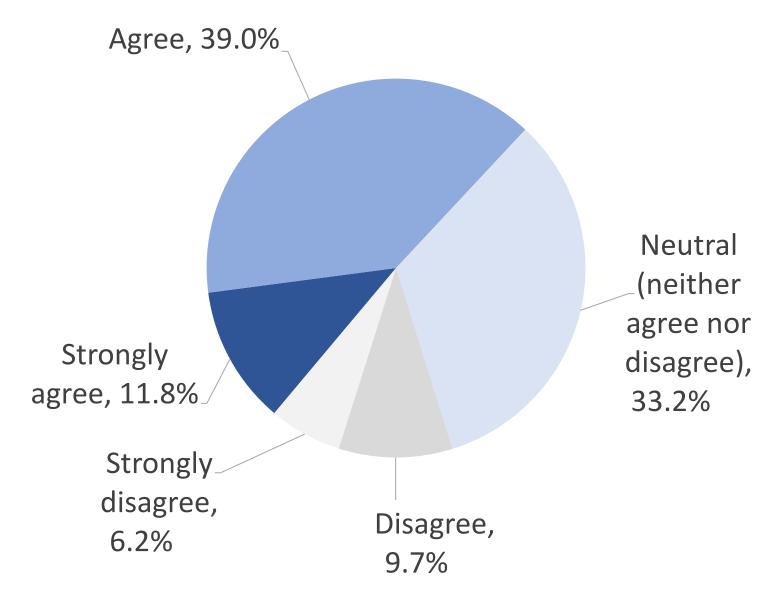
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



Replacing Long-Haul Travel with Regional Trips

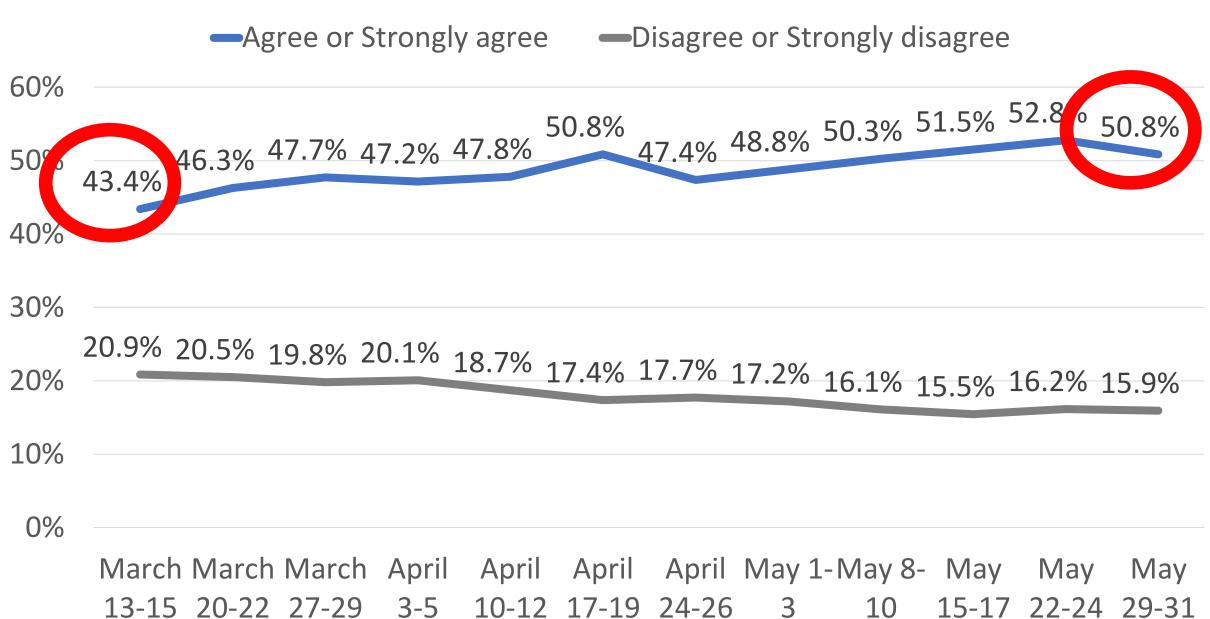
How much do you agree with the following statement?

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 and 1,257 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 and 29-31, 2020)







KEY TAKEAWAYS

- The idea of replacing vacations and long-haul travel with staycations and regional trips had been consistently gaining strength, but reversed course this week
- A majority of Americans continue to feel they will push off international travel
- Many Americans remain in agreement that they will substitute road trips for air travel

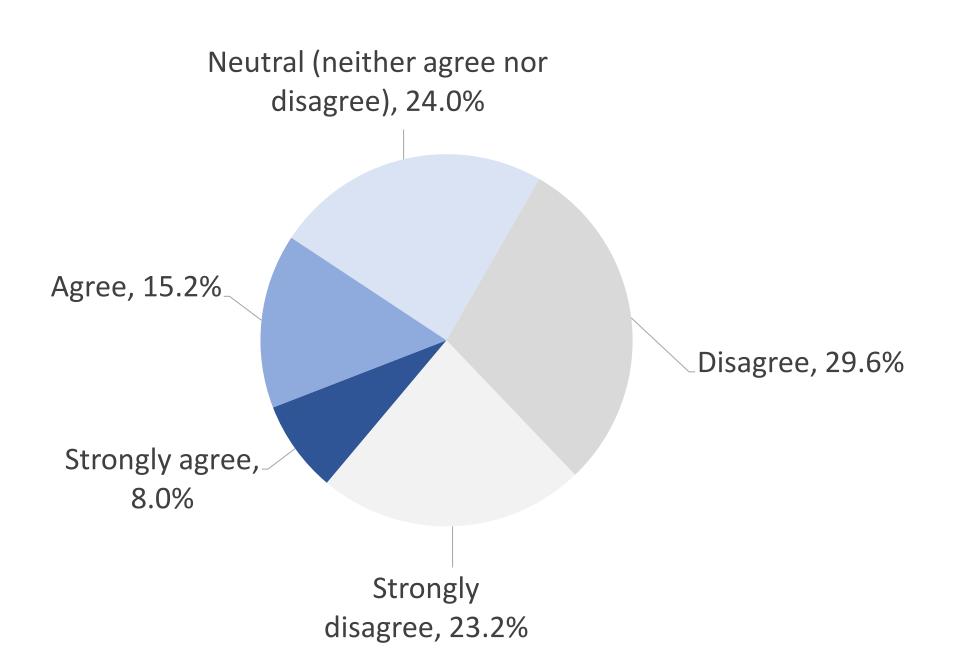


When we will mave

Expectations for Fall Travel Season

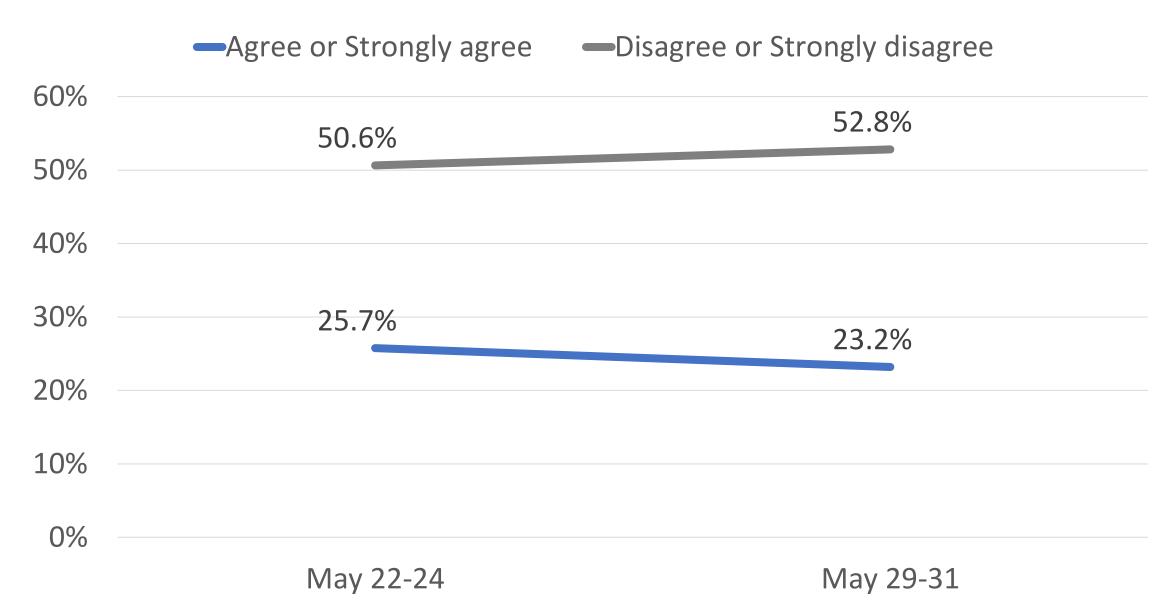
How much do you agree with the following statement?

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





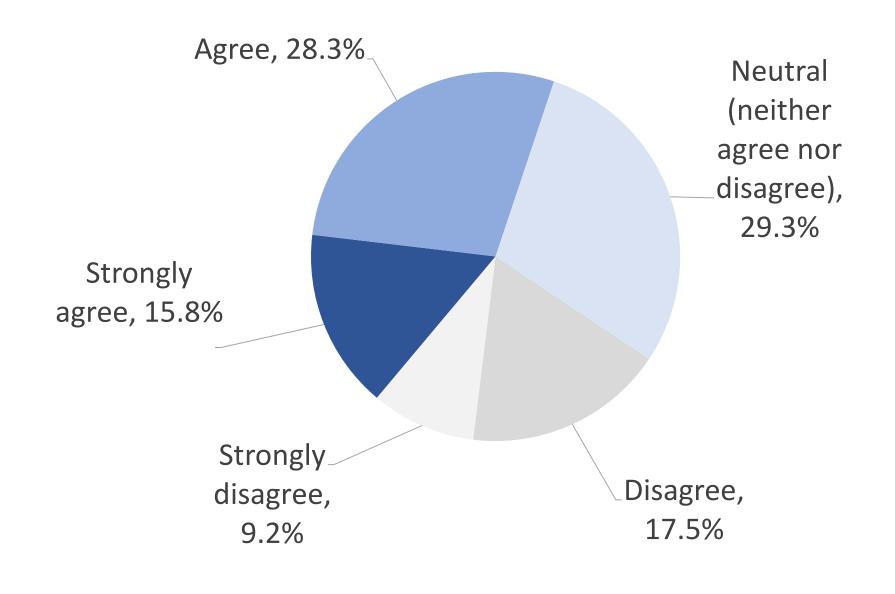
(Base: All respondents, 1,223 and 1,257 completed surveys. Data collected, May 22-24 and 29-31, 2020)



Expectations for Traveling in the Fall

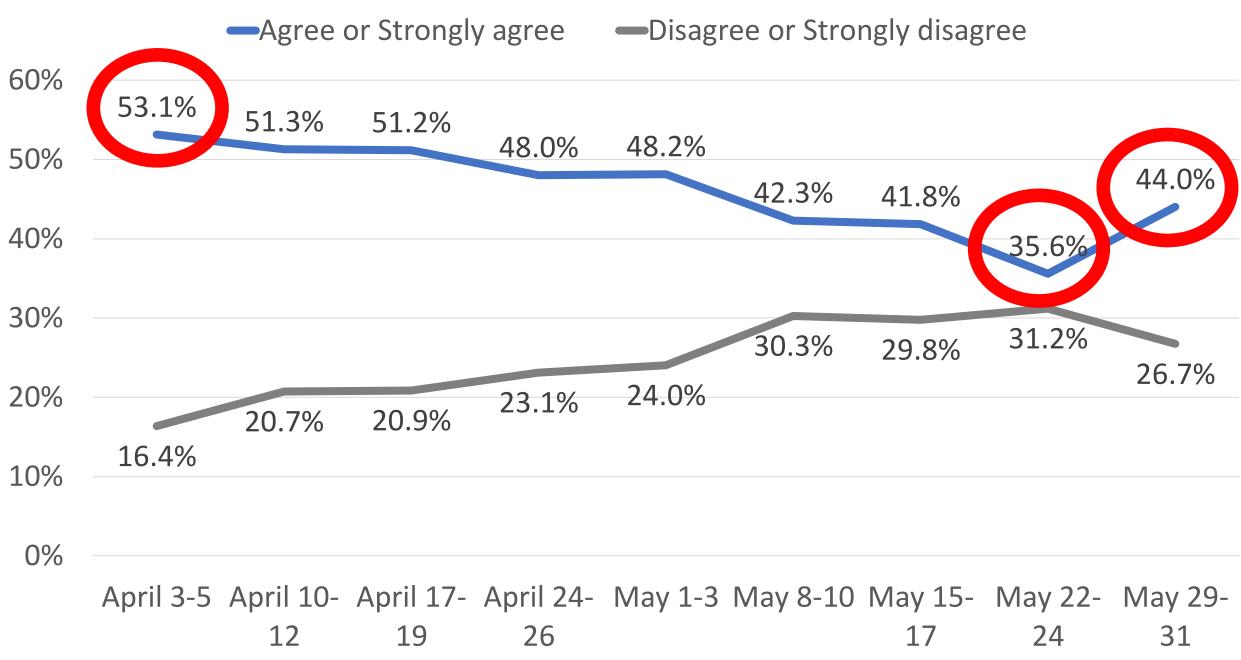
How much do you agree with the following statement?

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

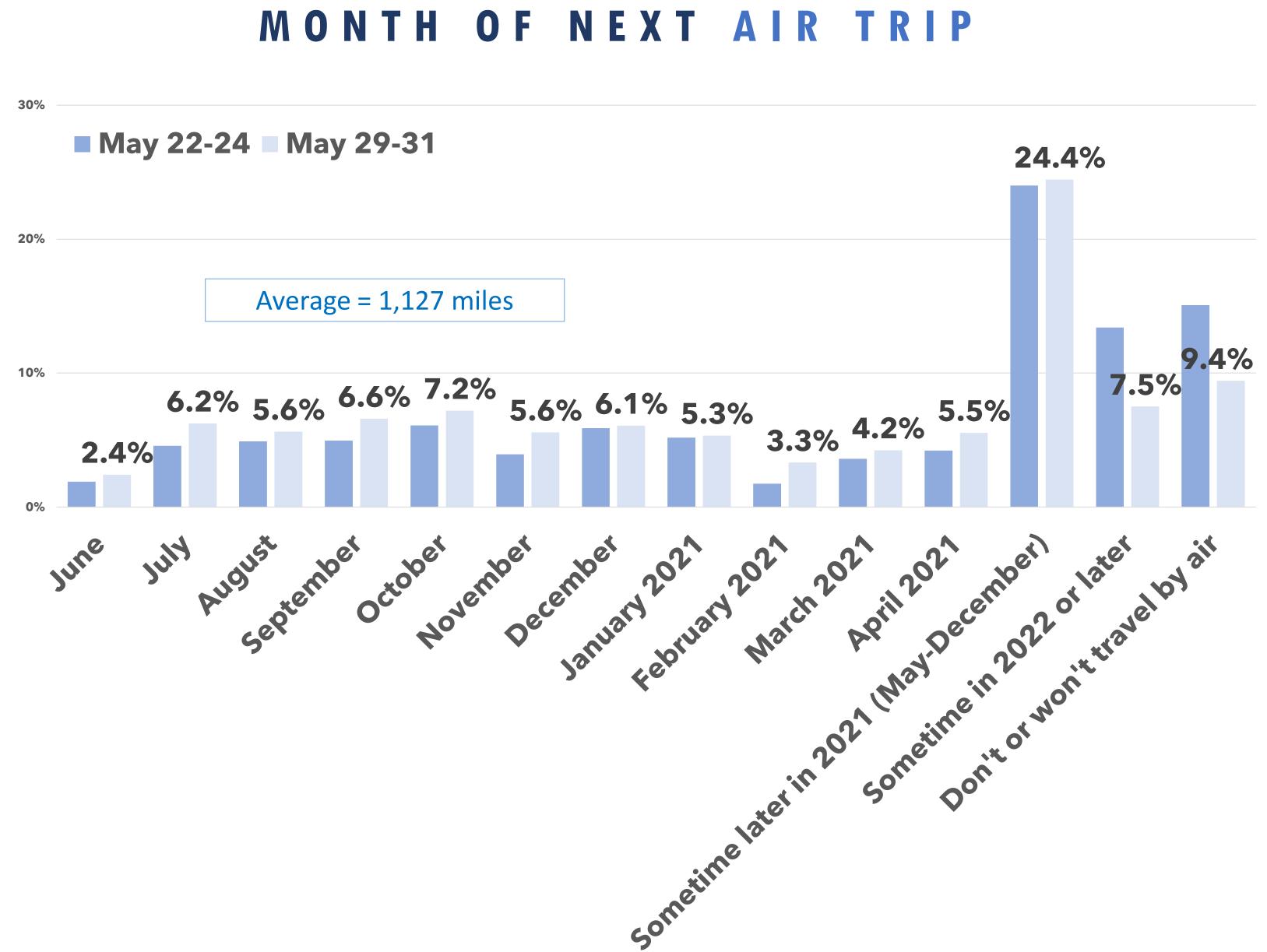


(Base: All respondents, 1,216, 1,263, 1,238 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)





Month of Next Commercial Airline Trip

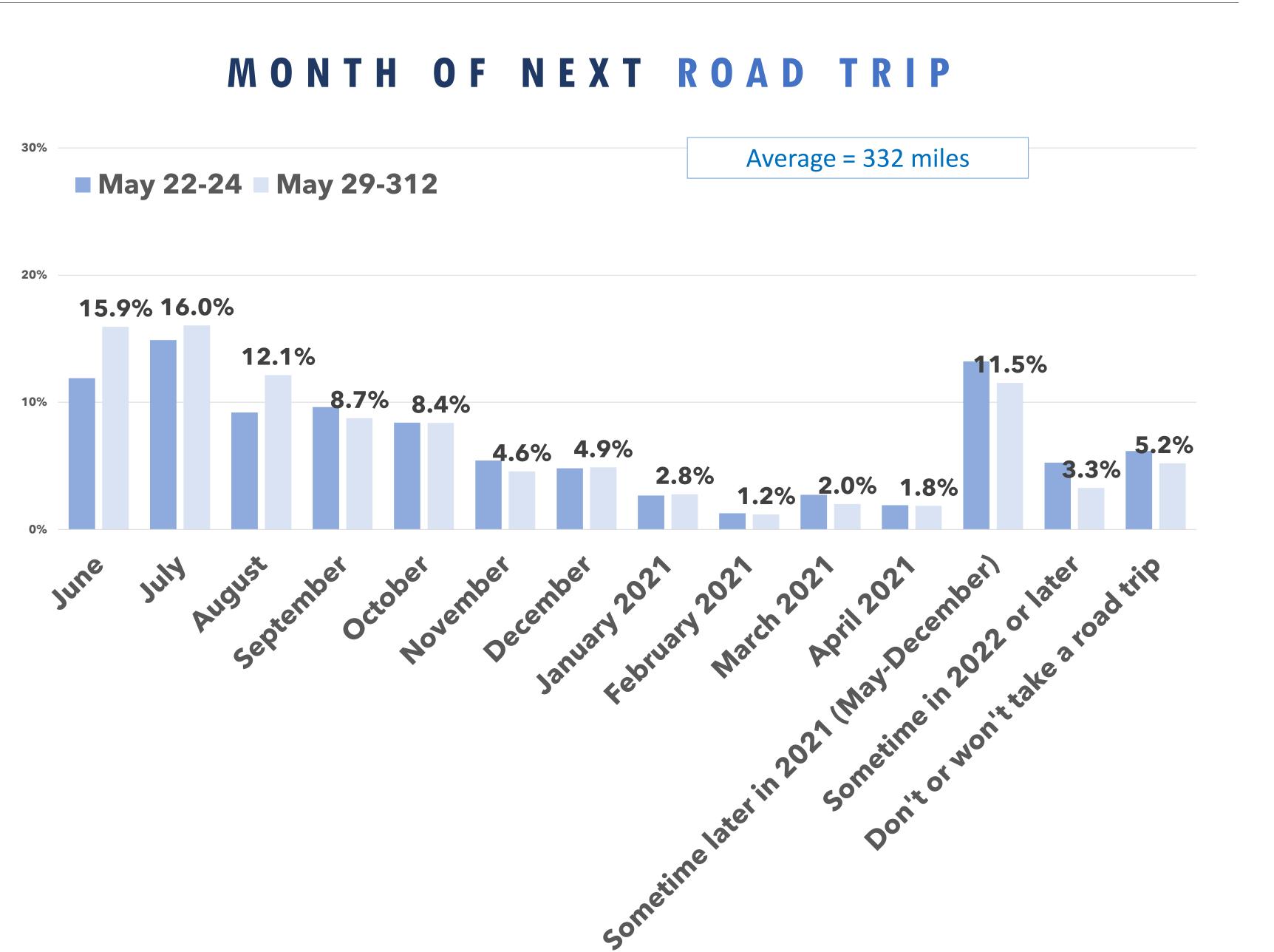


Question: In what month do you expect you will take your NEXT TRIP on a **commercial airline?**

(Base: Waves 11 and 12. All respondents, 1,223 and 1,257 completed surveys. Data collected May 22-24 and 29-31, 2020)



Month of Next Road Trip



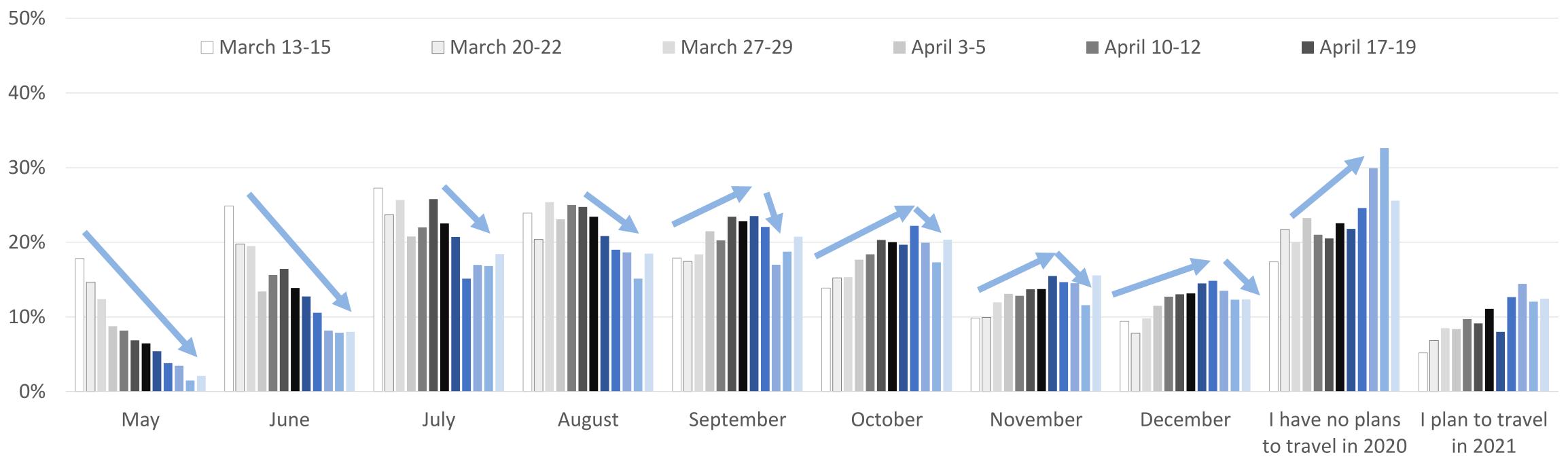
Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

(Base: Waves 11 and 12. All respondents, 1,223 and 1,257 completed surveys. Data collected May 22-24 and 29-31, 2020)



Upcoming Travel Plans

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



17-19, 24-26 May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



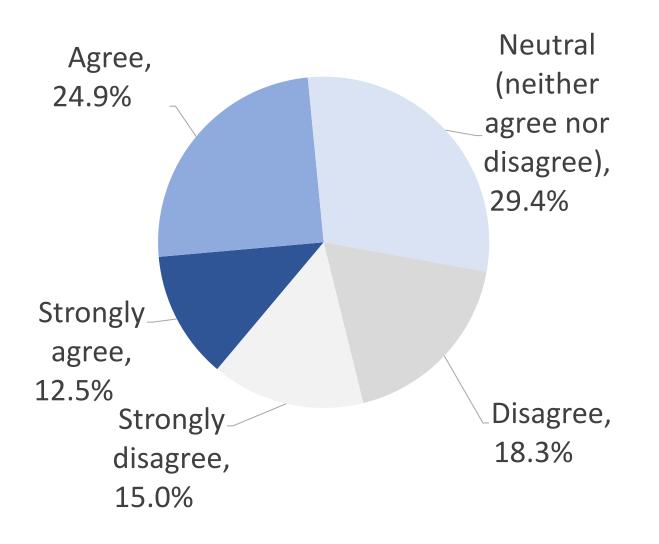


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1212, 1,223 and 1,257 completed surveys collected March 13-15, 20-22, 27-29, April 3-5, 10-12,

Discounts and Price Cuts

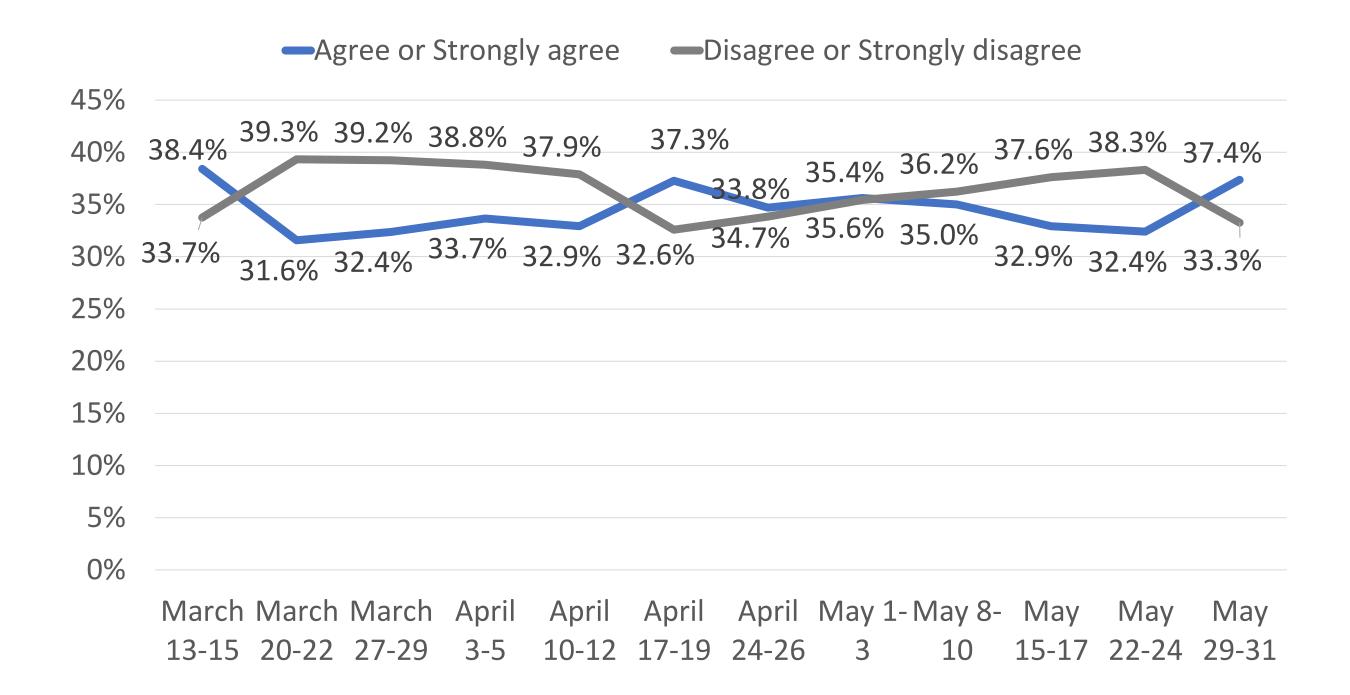
How much do you agree with the following statement?

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 and 1,257 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 and 29-31, 2020)





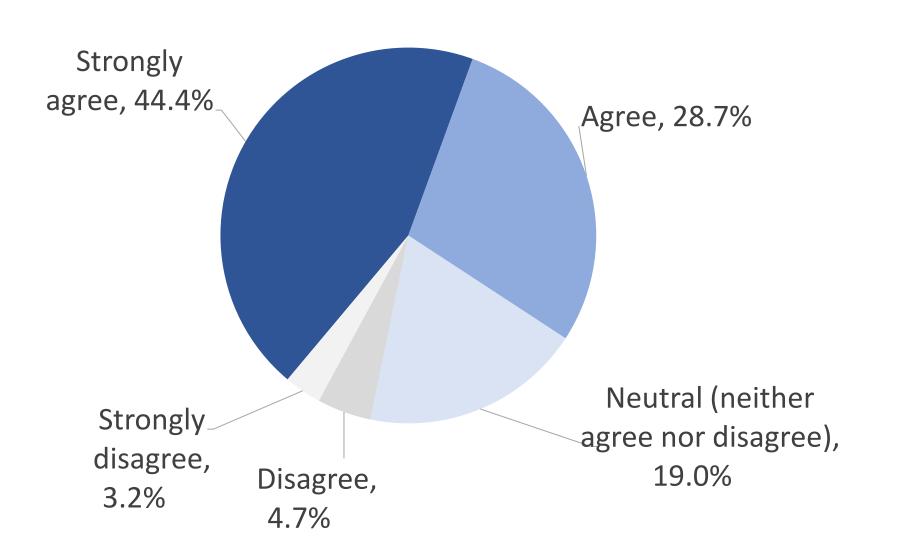
When Will We Reconvene?



Avoiding Conventions & Conferences

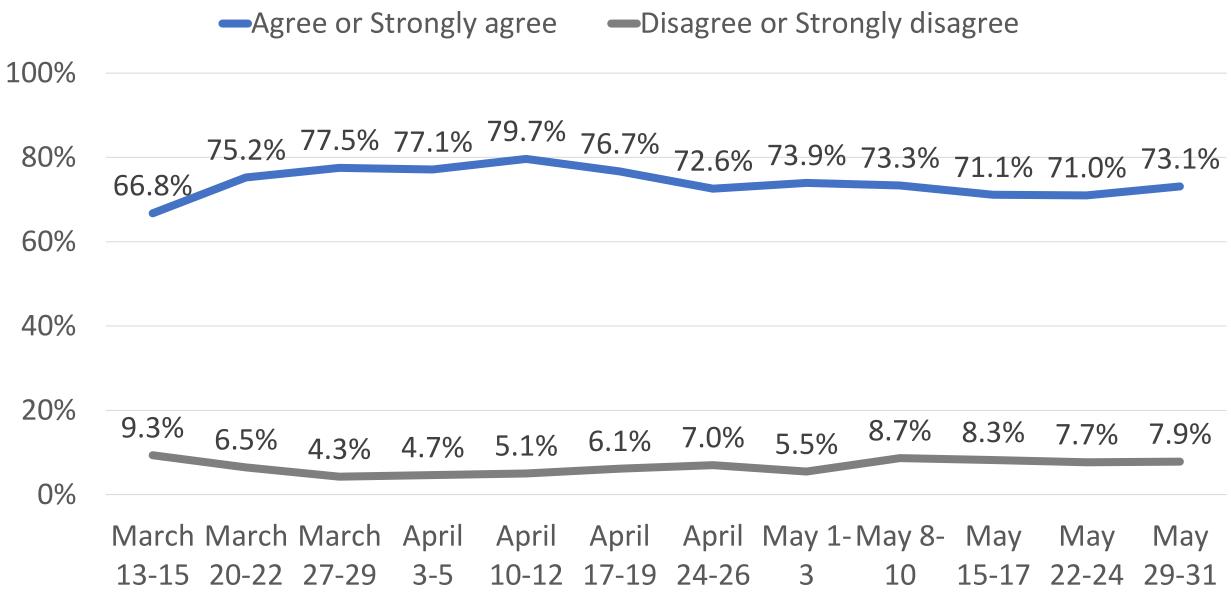
How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.

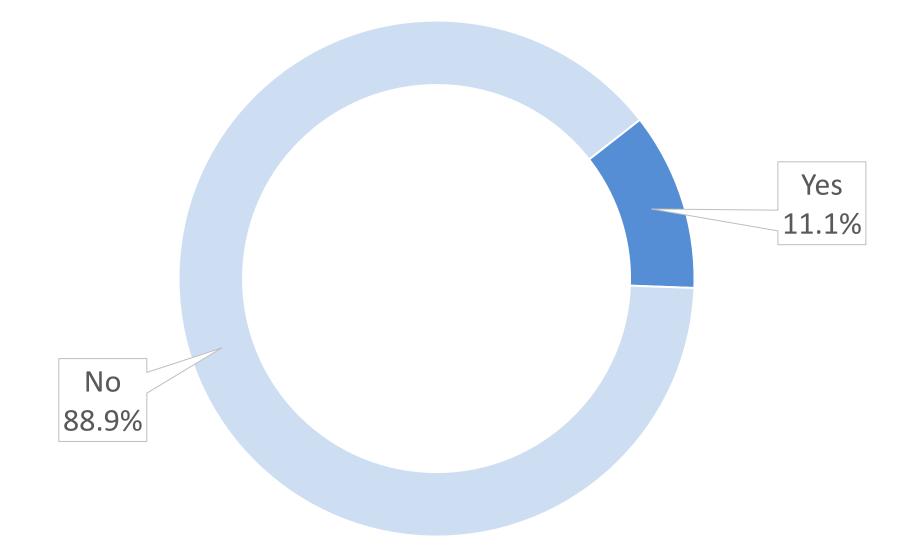


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)





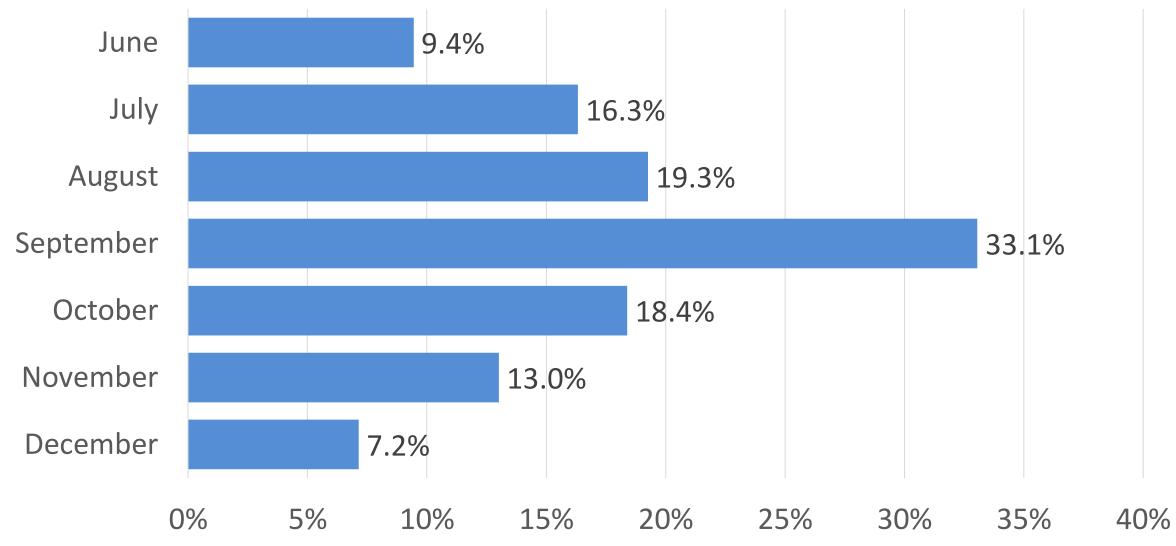
Meetings & Upcoming Travel



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

(Base: Wave 12. All respondents, 1,257 completed surveys. Data collected May 29-31, 2020)



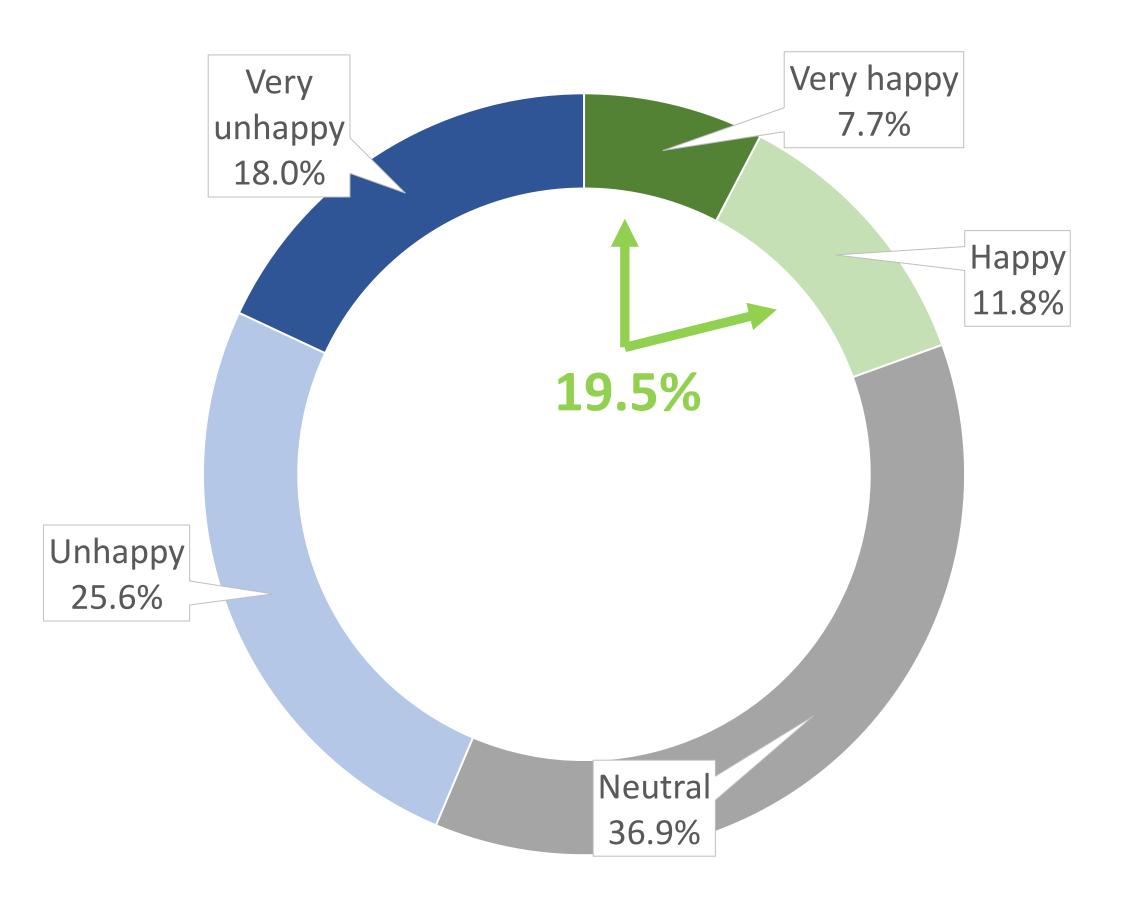


Question: In what months do you have travel for a CONVENTION, CONFERENCE OR GROUP MEETING planned?

(Base: Wave 12. Respondents with a planned meeting this year, 131 completed surveys. Data collected May 29-31, 2020)

Question: How would you feel if you learned that a conference or convention was planning to meet in your community later this summer? (Select one)

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







KEY TAKEAWAYS

The pandemic may be becoming a more accepted part of the fabric of our lives. Gradually fewer travelers are saying it will keep them from traveling until resolved

Expectations for Fall travel broke from a downward trend this week, with more optimism shown for hitting the road this autumn

Trip plans increased from July through November

The next air and road trips will likely be sooner than anticipated last week

One in ten travelers plan to take a groupmeeting/convention trip this year-to date, September appears the most popular month for such travel

What Travel Means to Us



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

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





Feelings About Traveling Now: Historical Perspective

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

March







April



May



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

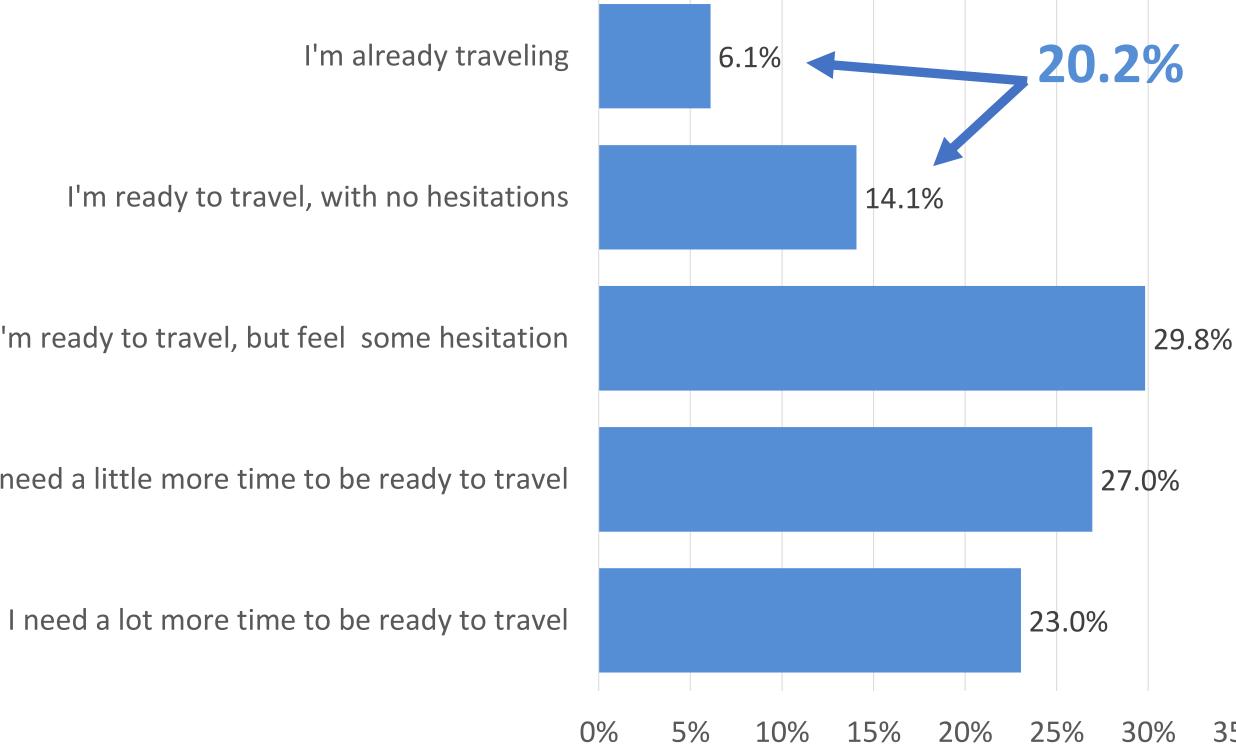
(Base: All respondents 1,257 completed surveys. Data collected May 29-31, 2020)

I'm ready to travel, but feel some hesitation

I need a little more time to be ready to travel







35%

What do we most want?

Money

Safety



Happiness

Friendship

Love

Escape



Tell us about your lifestyle priorities in the next six months.

However you personally define each, use the scale provided to indicate how you will prioritize these in the next six months.

QUESTION:





O High priority O Low priority O Not a priority

O Essential priority O Medium priority

Current State of Mind Regarding Travel

Question: Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.

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

Staying safe from infe

Emotional well

Finding joy or hap

Rela

Escape from

Physical f

Making n

Connecting with

Escape from bor

Healing and rec

Connect with r

Have new experi

Learning/educ





fection	28.8%			46.7%				
ll-being	38.0%	,)		32.1%	,)			
opiness	39.3%	6		30.7%	6			
axation	40.29	%		23.5%				
n stress	35.1%		22.	5%				
fitness	32.7%		23.7	%				
money	29.6%		26.1%			 High priority Essential priority 		
others	33.6%		16.0%					
oredom	32.3%		15.9%					
ecovery	28.8%		17.9%					
nature	28.2%	1	.6.6%					
riences	22.3%	11.8%				·		
ucation	20.5%	12.9%						
09	% 20	%	40%		60%		80%	



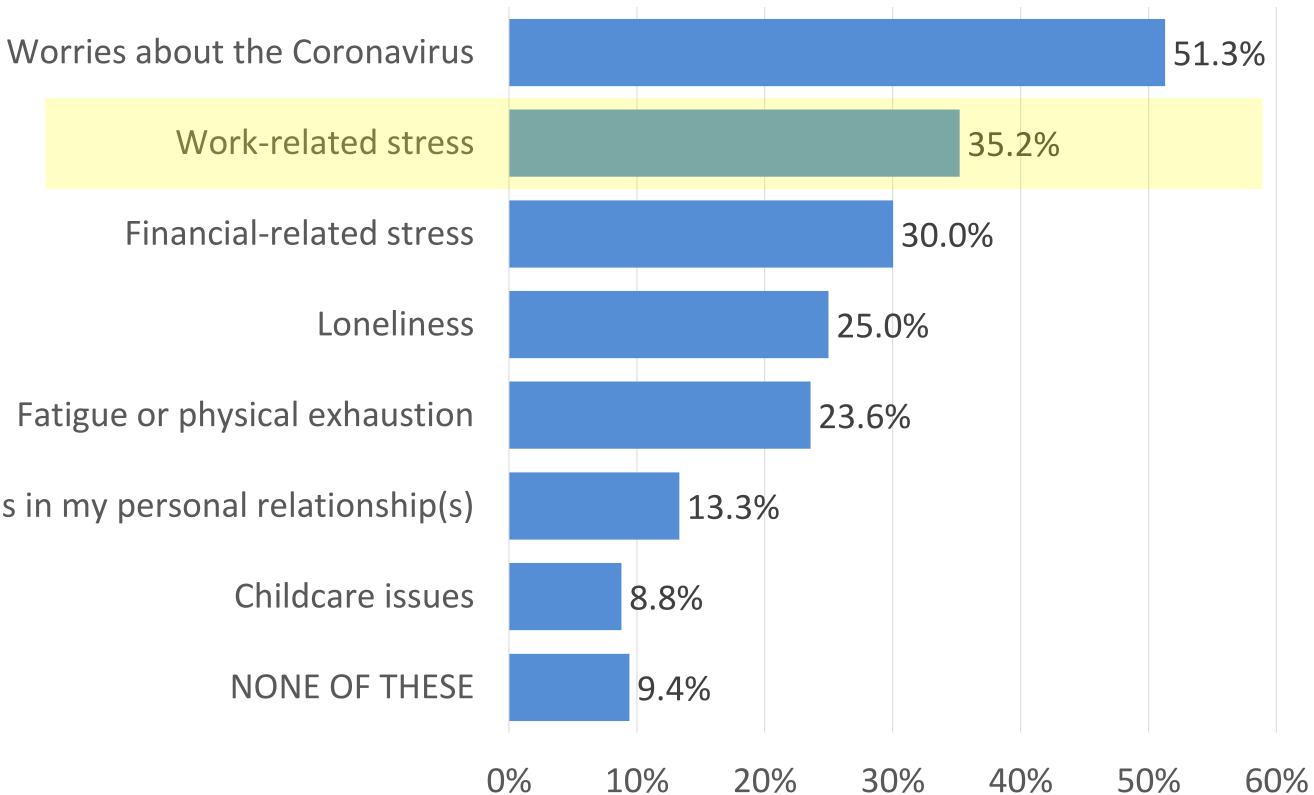
Question: You said earlier that "Escape from stress" will be a priority in your life this year.

Which of types of stress are you hoping to reduce? (Select all that apply)

(Base: Respondents seeking escape from stress 1,087 completed surveys. Data collected May 29-31, 2020)

Problems in my personal relationship(s)





Question: Which of these workrelated stresses are you hoping to reduce? (Select all that apply)

(Base: Respondents stressed out by work issues, 367 completed surveys. Data collected May 29-31, 2020) Worries about losing my job

Poor management/bad boss

Too many hours

Too much responsibility

Problems with co-workers

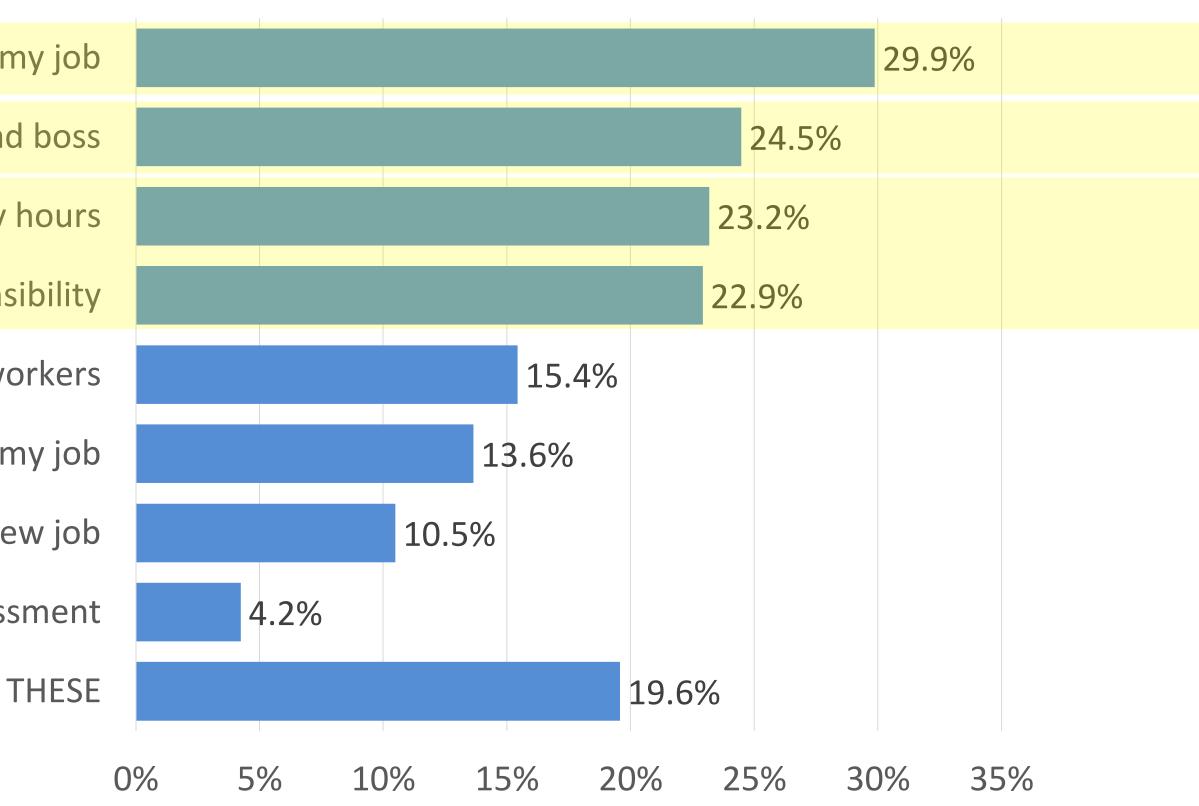
I just don't like my job

Worries about finding a new job

Discrimination/harrassment

NONE OF THESE







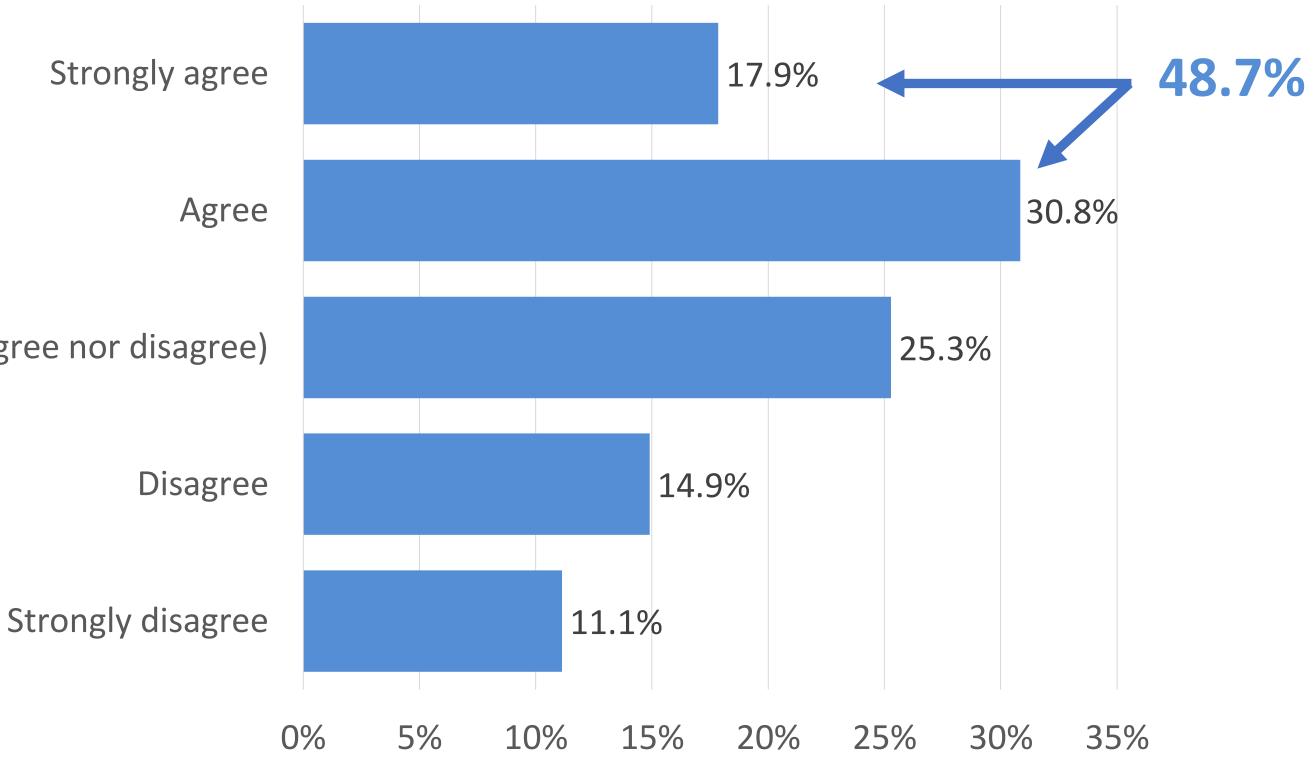
Question: How much do you agree with this statement?

In the current environment, taking a vacation would help me manage the stress in my life.

Neutral (neither agree nor disagree)

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





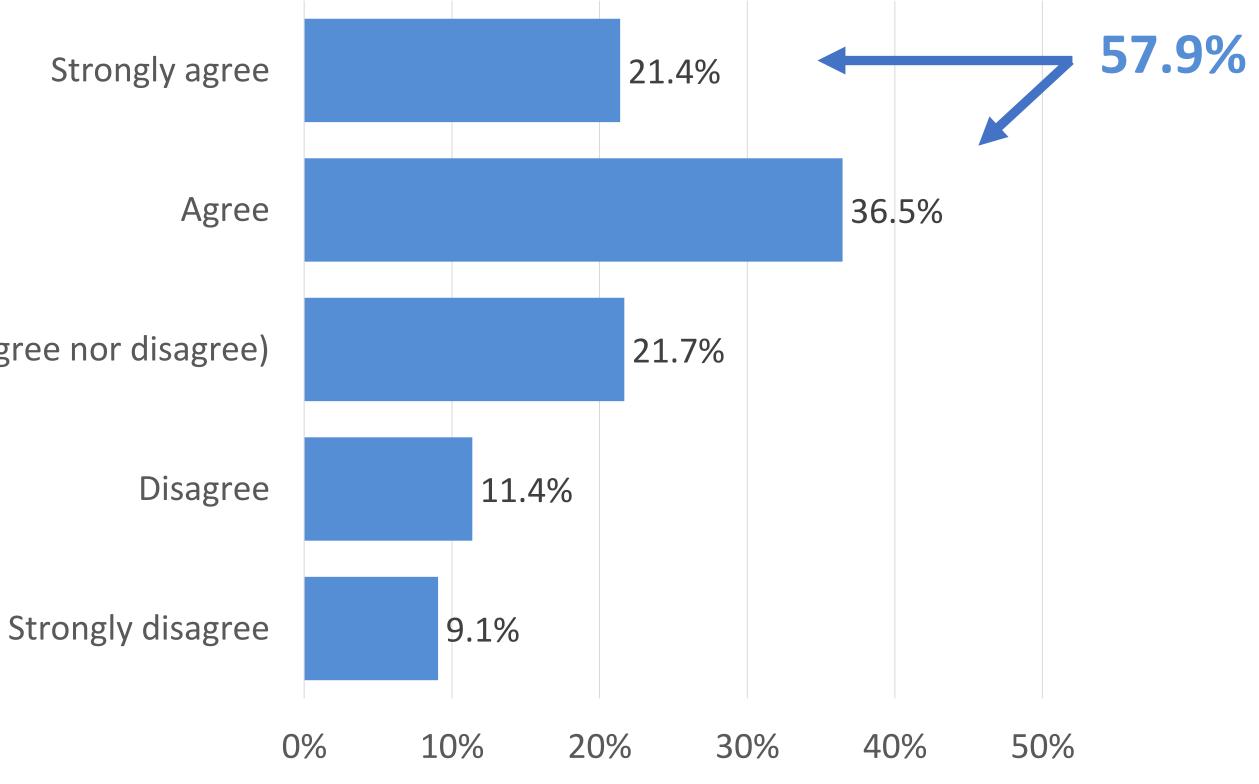
Question: You said above that "Relaxation" will be a priority. How much do you agree with this statement?

In the current environment, taking a vacation would be a good way for me to relax.

Neutral (neither agree nor disagree)

(Base: Respondents seeking relaxation, 1,149 completed surveys. Data collected May 29-31, 2020)

Destination Analysts



Question: In the next TWELVE (12) MONTHS, which of types of travel experiences would you find most relaxing? (Select at most 3)

(Base: Respondents seeking relaxation, 1,149 completed surveys. Data collected May 29-31, 2020)

Spending time visiting friends or family Taking a road trip Staying at a beach resort

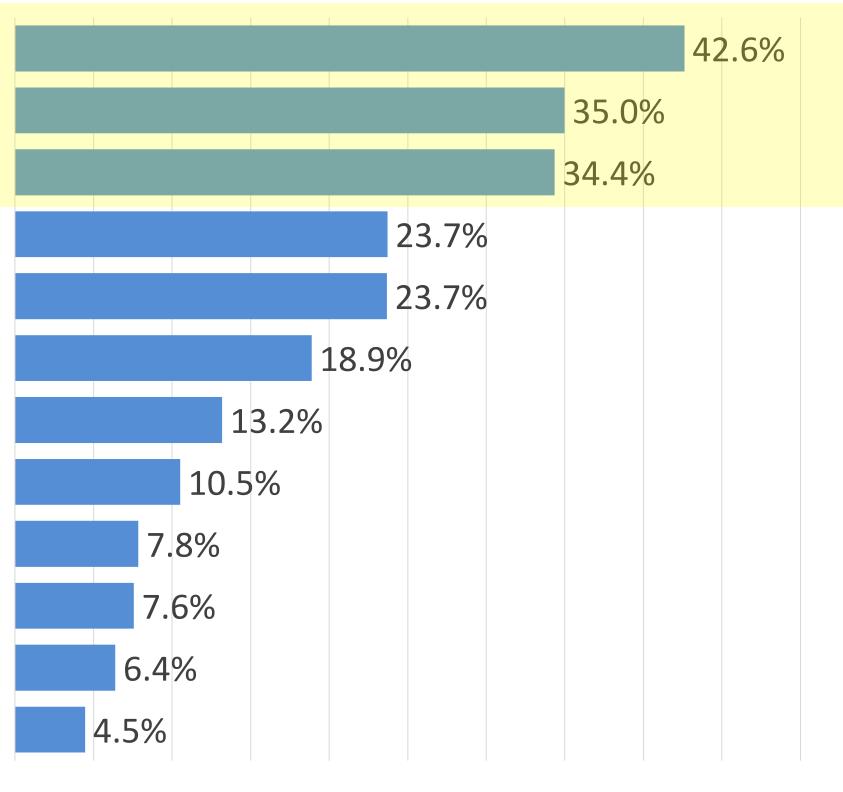
Taking a staycation Taking a cruise

Visiting a National park Taking an international trip Exploring a city or urban area Attending sporting events

Visiting a state or regional park

Visiting arts and cultural institutions Attending performing arts shows and events

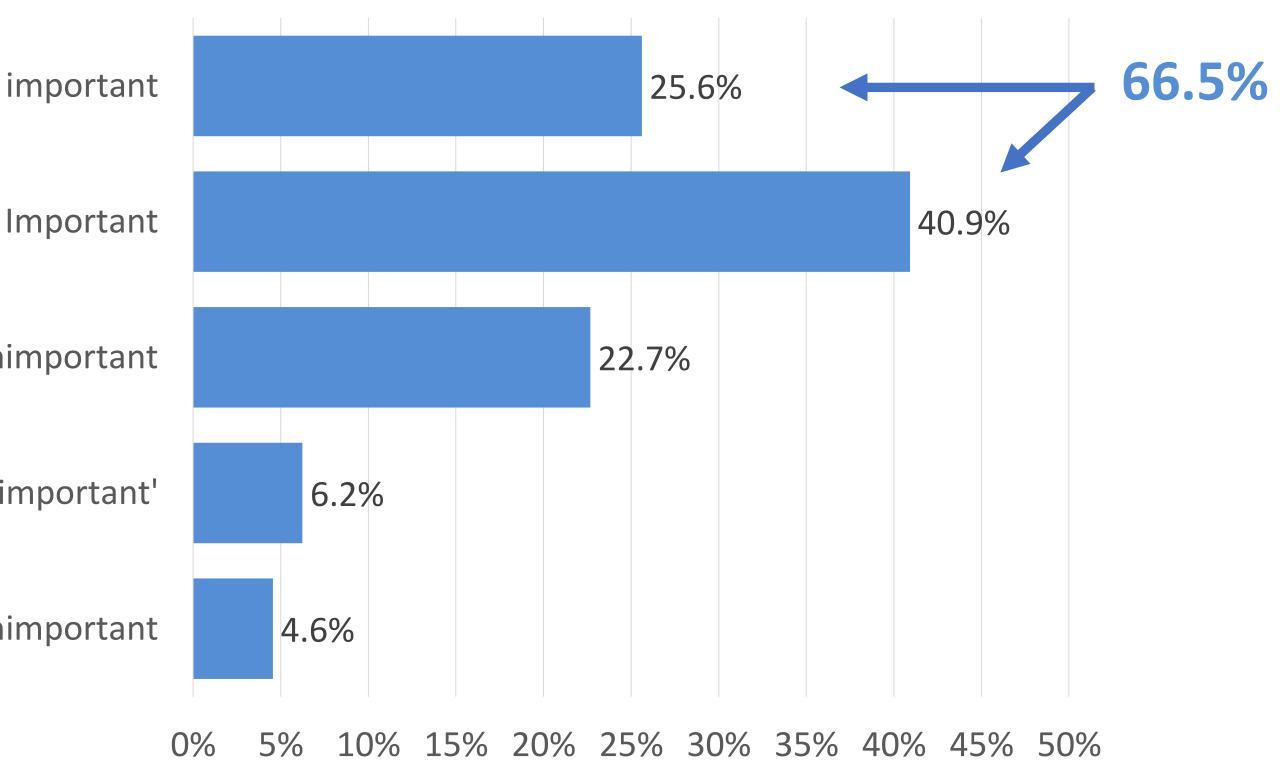




5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 0%

Question: You said above that your "Emotional Well-being" will be a priority in the next year.	Very ir
How important do you expect leisure travel will be in promoting you emotional well-being?	Ir Neither important nor unir
(Base: Respondents seeking emotional well-being, 1,171 completed surveys. Data collected	Unin
May 29-31, 2020)	Very unir





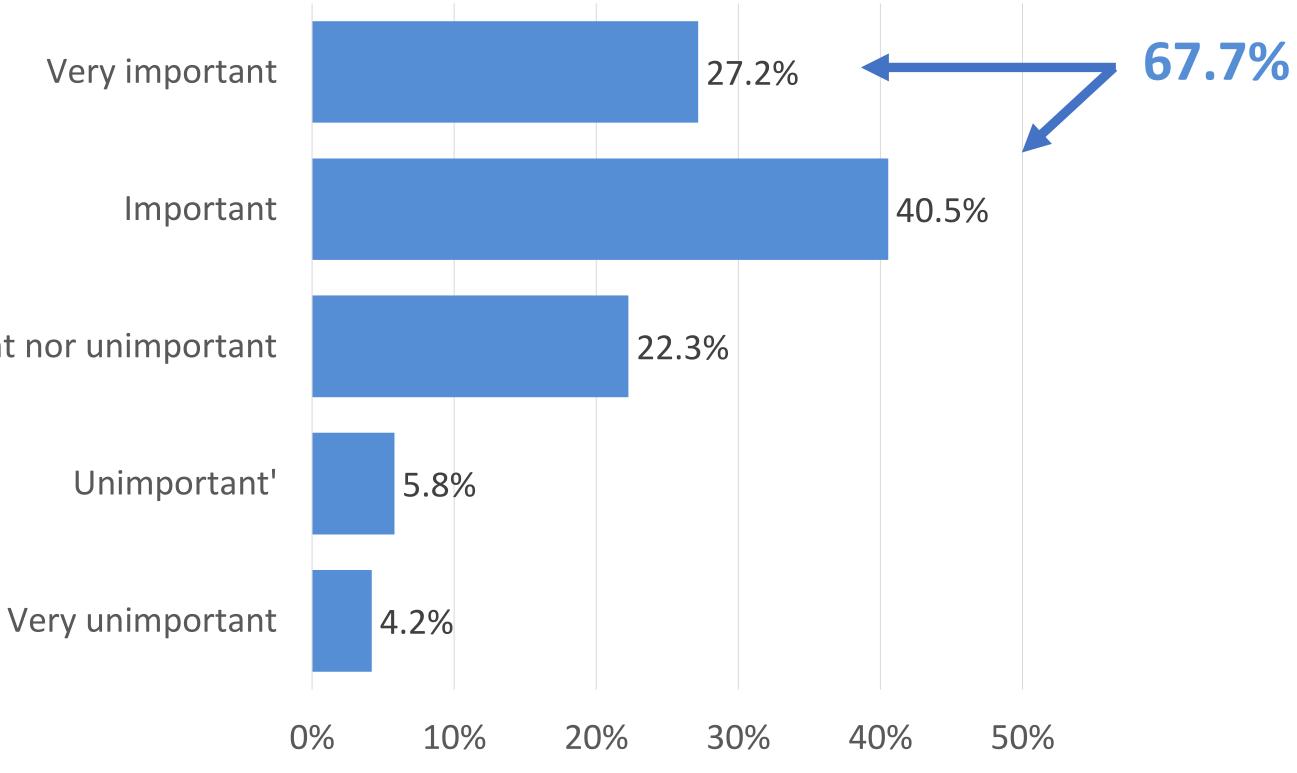
Question: You said above that your "Finding Joy or happiness" will be a priority in the next year.

How important do you expect leisure travel will be in helping you find joy or happiness?

Neither important nor unimportant

(Base: Respondents seeking *joy/happiness, 1,177 completed* surveys. Data collected May 29-31, 2020)







KEY TAKEAWAYS

- Fear of contracting the virus remains the primary top-of-mind association with travel
- About 1-in-5 travelers now report that are either currently traveling or ready to do so with out hesitation
- Travelers still hold as a top priority staying safe from contracting the virus, yet travel is well-positioned to satisfy their other top personal priorities.



Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 1st



What is a Predictive Index?

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

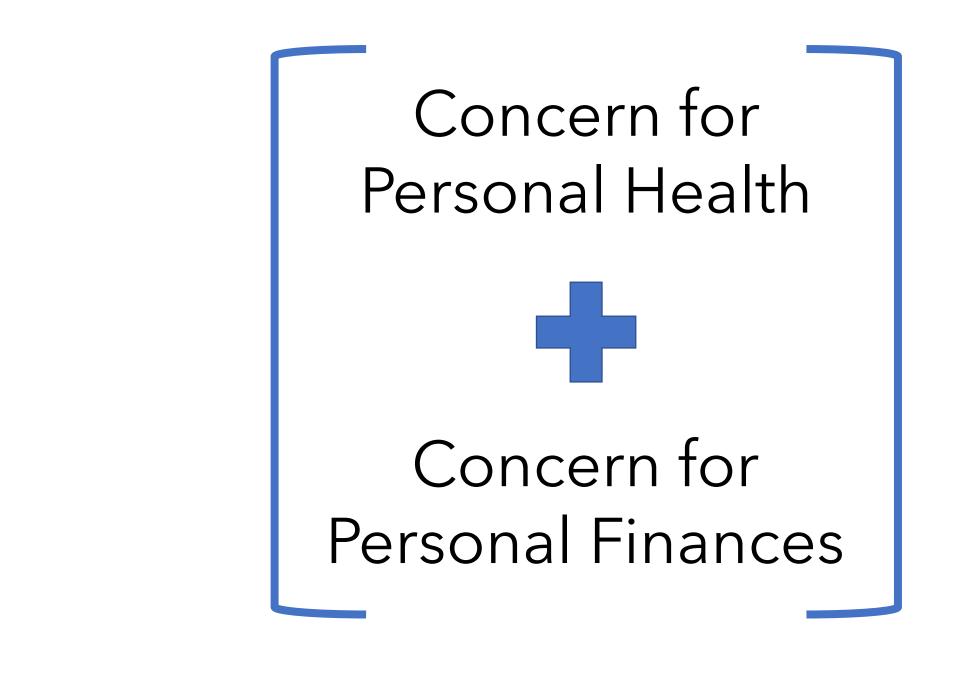
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make datadriven predictions.

The goals are to identify:

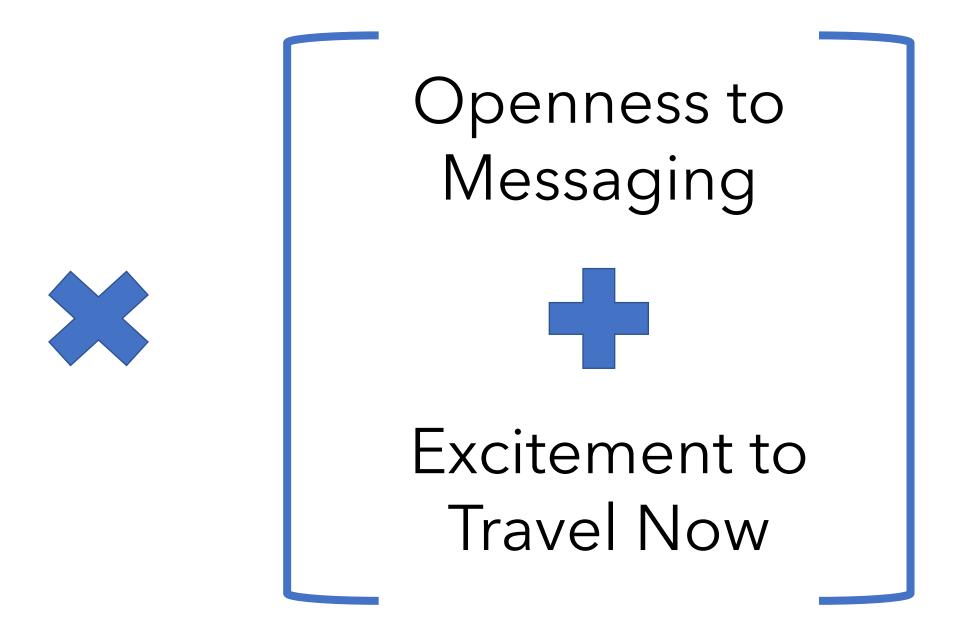
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel



Predictive Index Formula

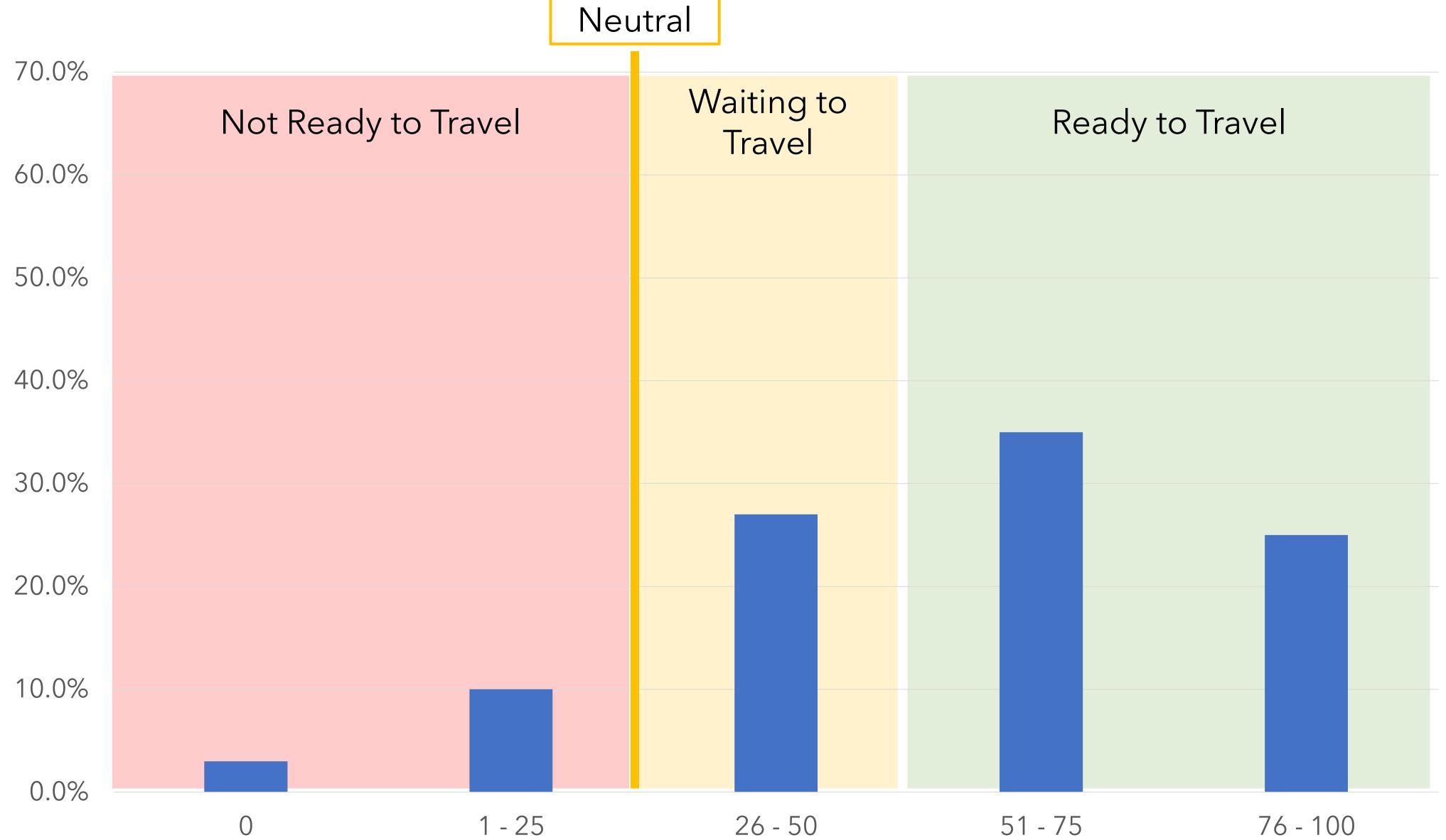


*Normalized to a 100pt scale



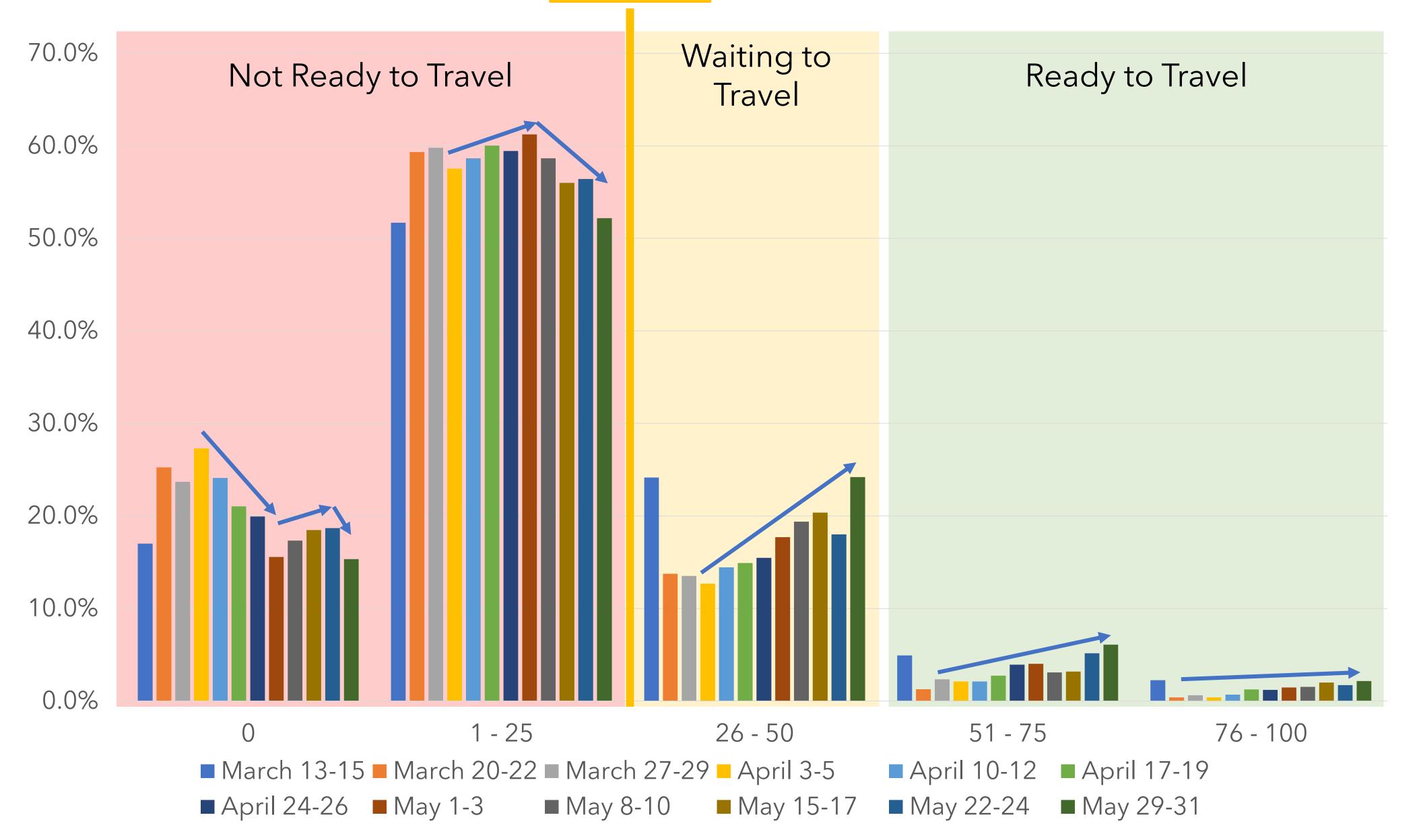


Healthy Travel Outlook



■ High Travel







100.0	
100.0	
90.0	
80.0	Gen X and F Girst to Inde
	안 Gen A and F S first to Inde
70.0	
60.0	Ř
50.0	
40.0	Waiting to Travel
30.0	No F
20.0	Not Ready to Travel
10.0	Ready
0.0	
March	13-15 20-22 21-29 April 3-5 10-12 11-19 24-26 N March 20-22 April 21-29 April 3-5 April 10-12 April 11-19 April 24-26 N

Rural respondents are ex at 25 on Average May 1-3 8-10 15-17 22-24 29-31 May May May May 22-24

—Total

- -Millennials or younger
- —Gen X
- -Boomer or older
- -WEST
- -MIDWEST
- -NORTHEAST
- -SOUTH
- -Commercial Lodging Travelers
- —International Travelers
- -Air Travelers
- -Cruise Travelers
- -Leisure Travelers
- -VFR Travelers
- -Business Travelers
- -Convention Travelers
- -Female
- -Male
- —Affluent Over \$125K
- **—**\$80K \$125K
- —Under \$80K
- -City Travelers
- -Beach Travelers
- —Suburban area
- -Large city (urban area)
- —Rural area
- —Luxury hotel
- —Non-luxury Hotel
- -Peer-to-peer lodging

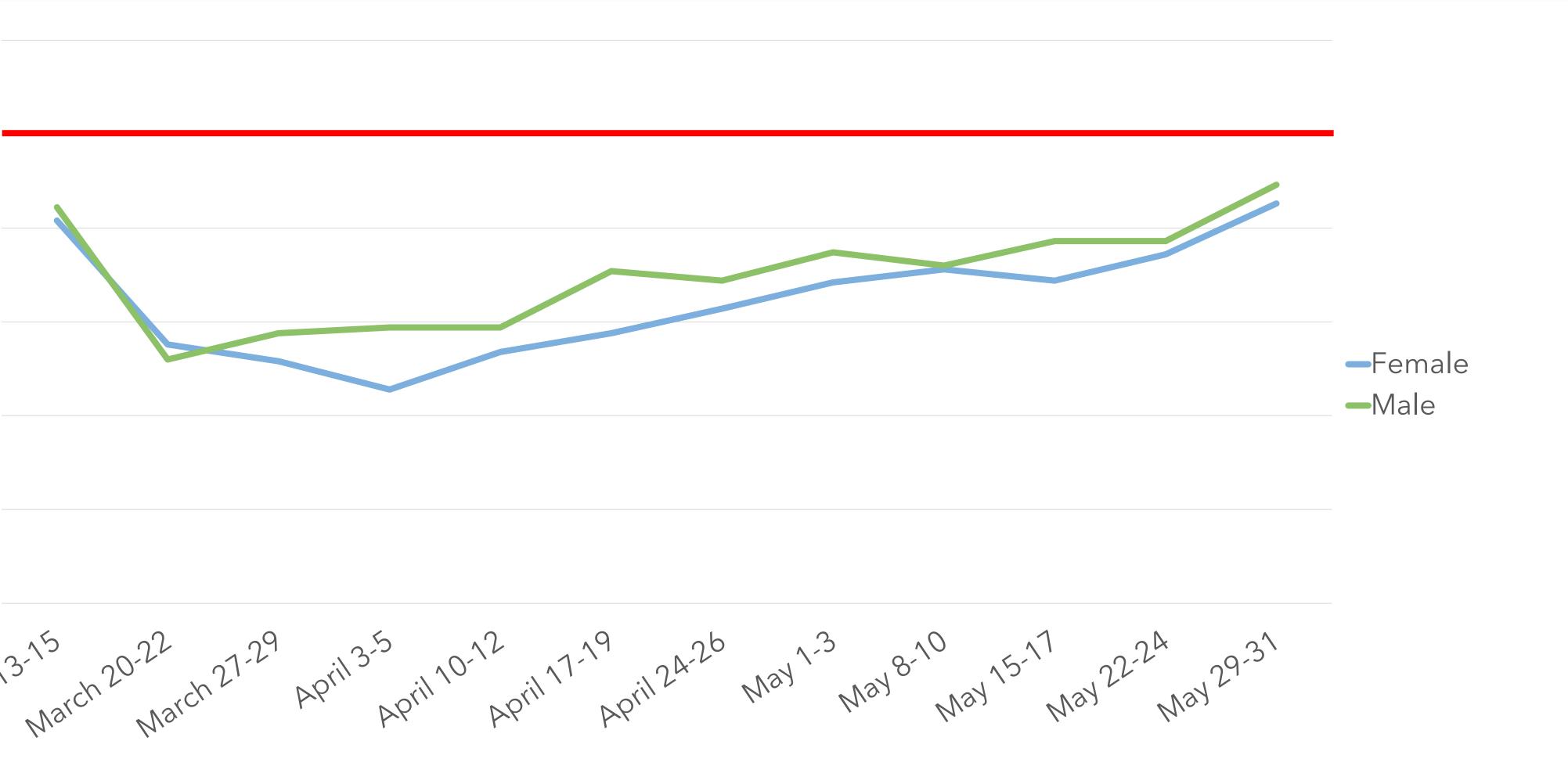
ers

- ullet
- 30.0 25.0 20.0 15.0 10.0 5.0 0.0 March 13-15

Gender

Points of Interest:

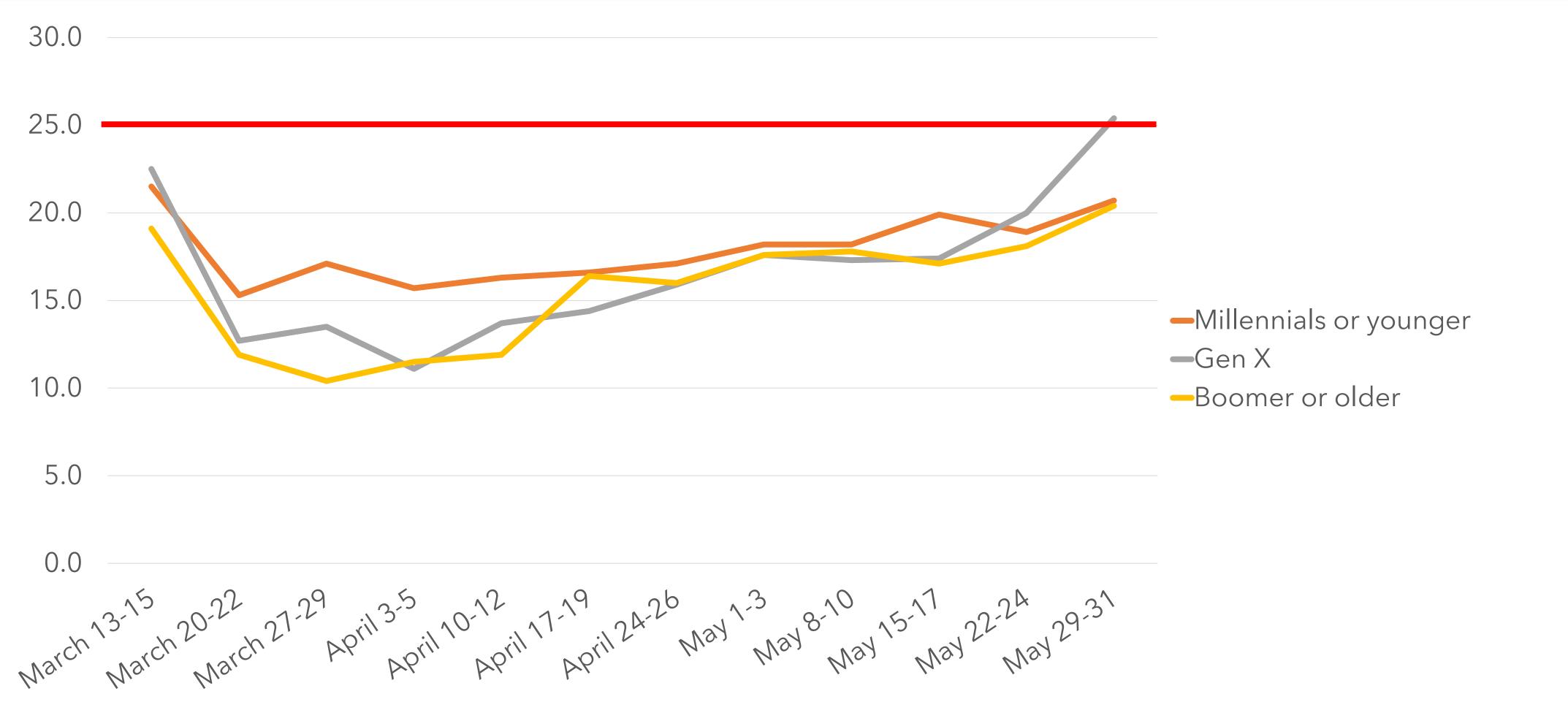
Safety concerns for both Men and Women stayed the same this week, while financial concerns dropped for both groups, more significantly for Men. Less than a third of women this week said they have no plans to travel in 2020 (29.5% down from 35.2%) while only a fifth of men (21.1% down from 28.8%) said the same.





- \bullet

Generation



Points of Interest:

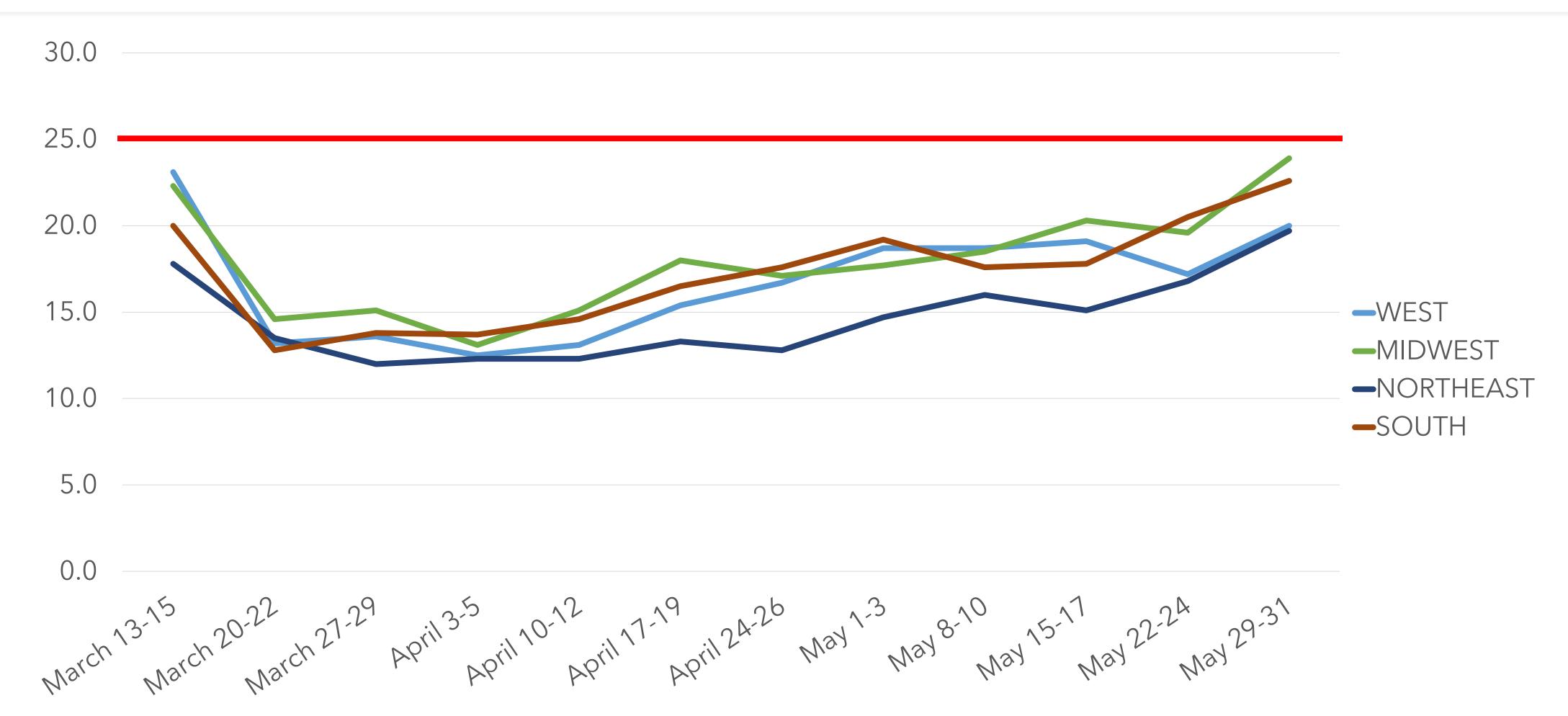
While safety concerns for Millennials and Boomers grew slightly this week, Gen X showed a relatively dramatic drop in safety concerns (6.1 out of 10, down from 6.9 just two weeks ago).

All generations show an increase in excitement to travel and openness to messaging, and most significant growth was among Gen X this week.



Points of Interest:

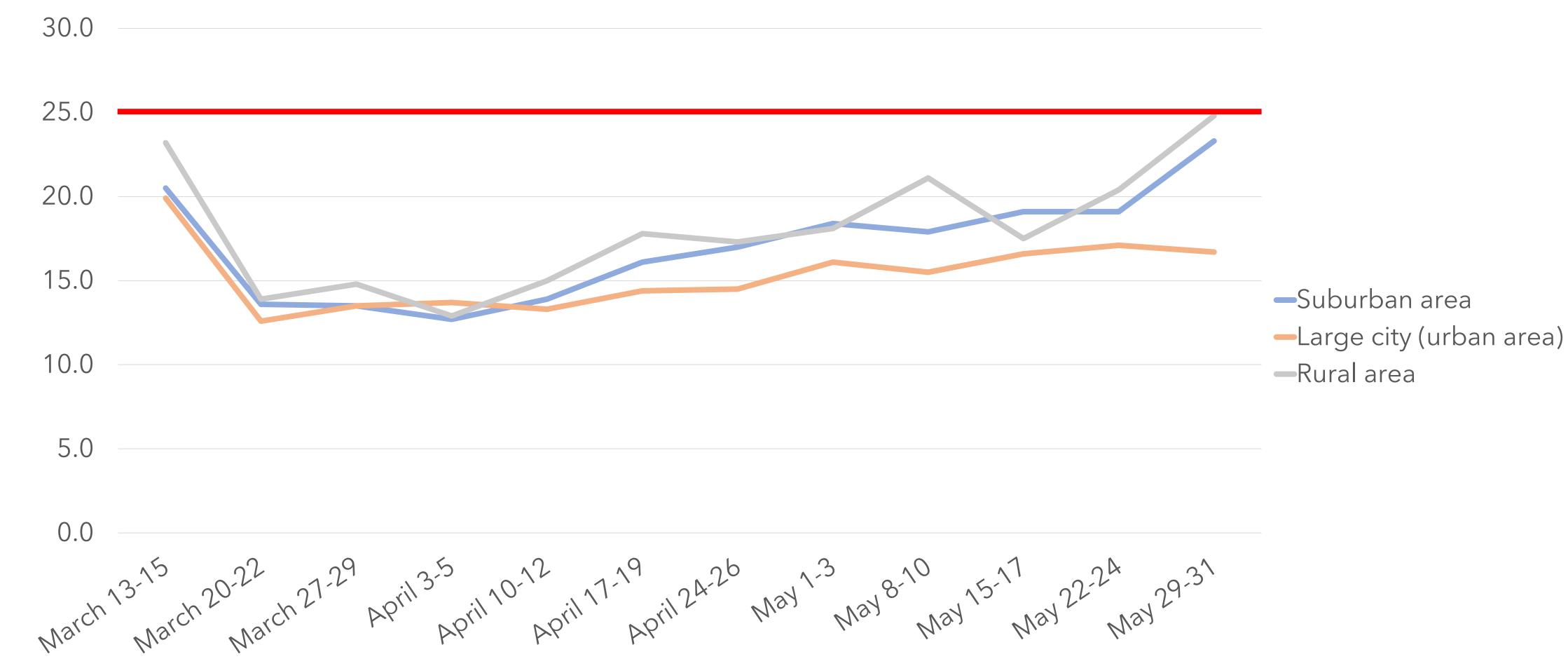
US Region



Safety concerns in all regions except the Northeast showed slight drops this week while financial concerns showed drops most significantly in the Midwest. Among all regions the Northeast showed the most optimism about the coronavirus situation improving in the next month.



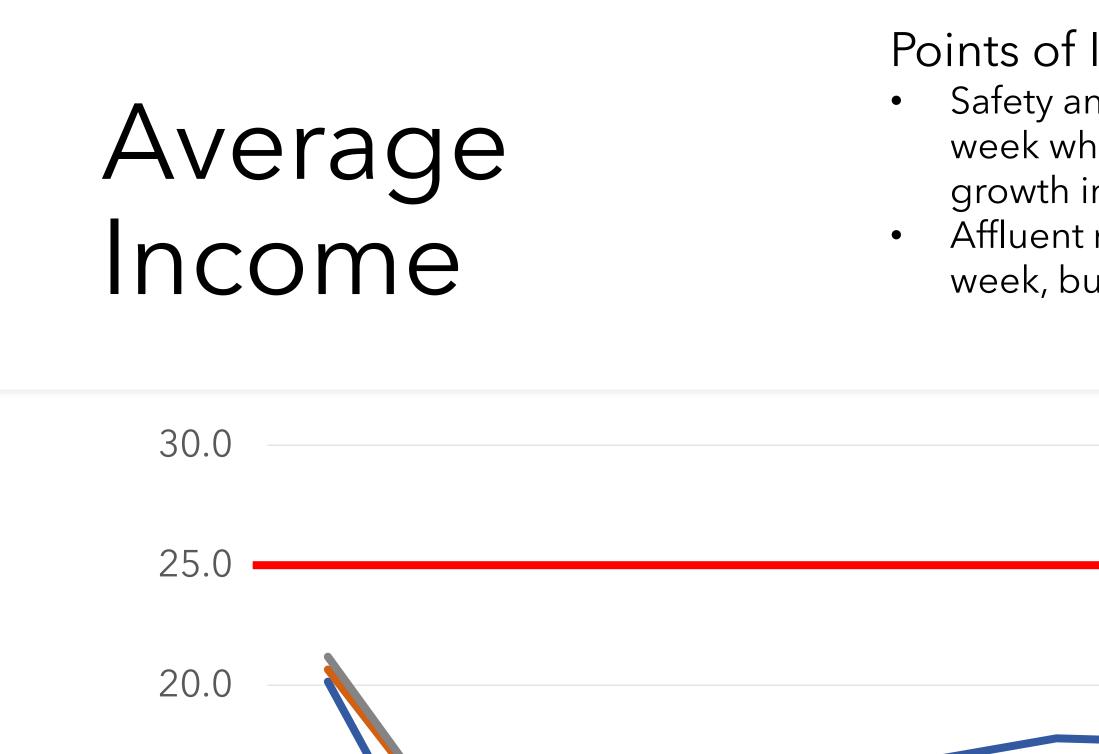
Type Of Residence

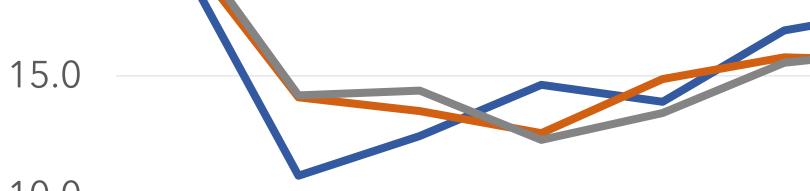


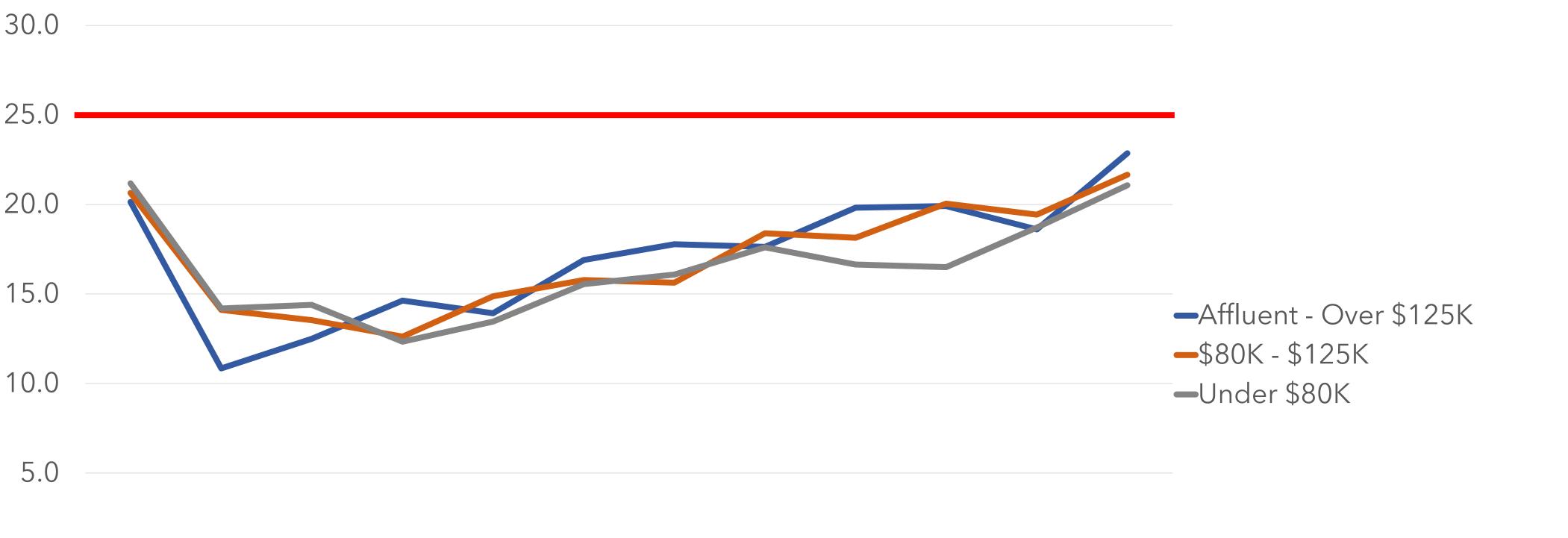
Points of Interest Impacting Index Scores:

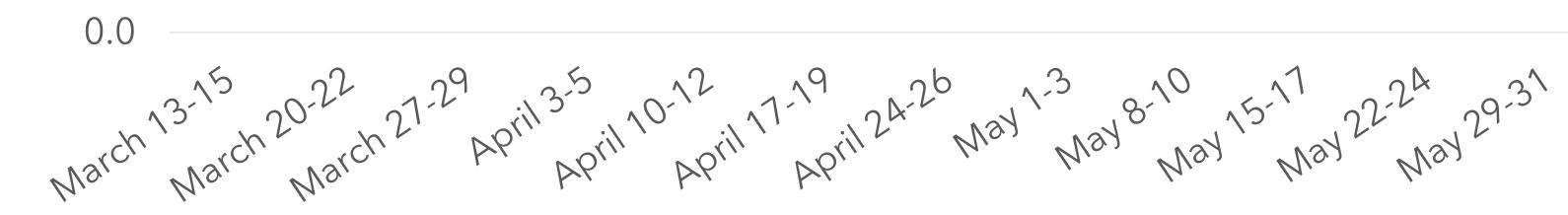
- Safety concerns grew again among Urban respondents this • week while showing drops for Suburban and Rural respondents.
- Rural respondents reported being the most excited to travel and Suburban report being the most open to messaging.









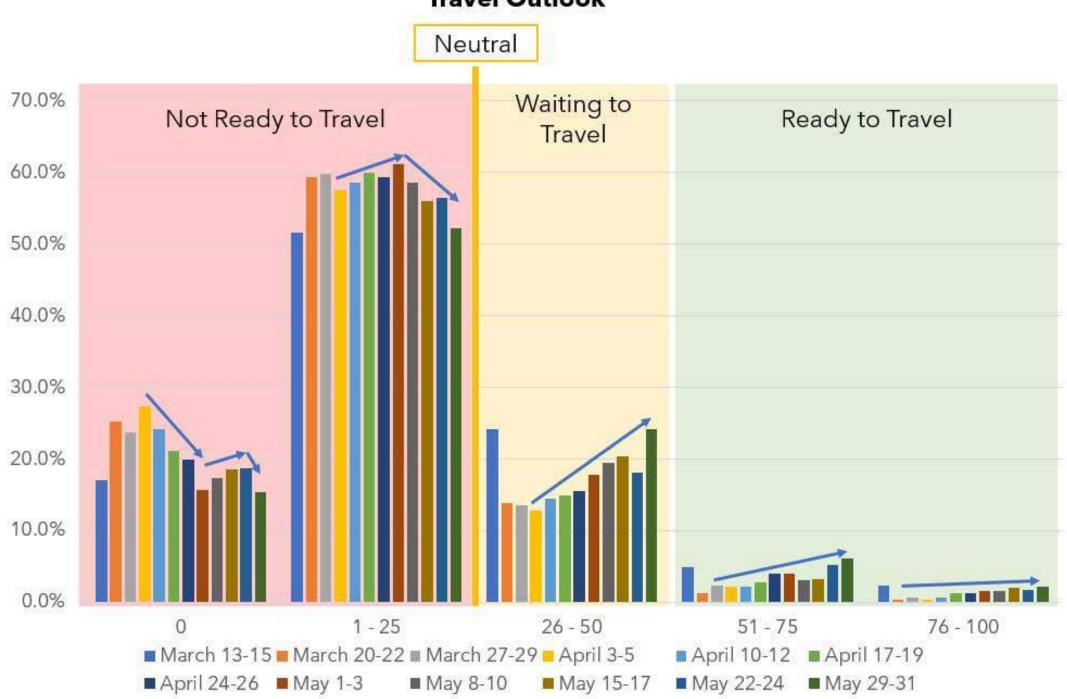


Points of Interest:

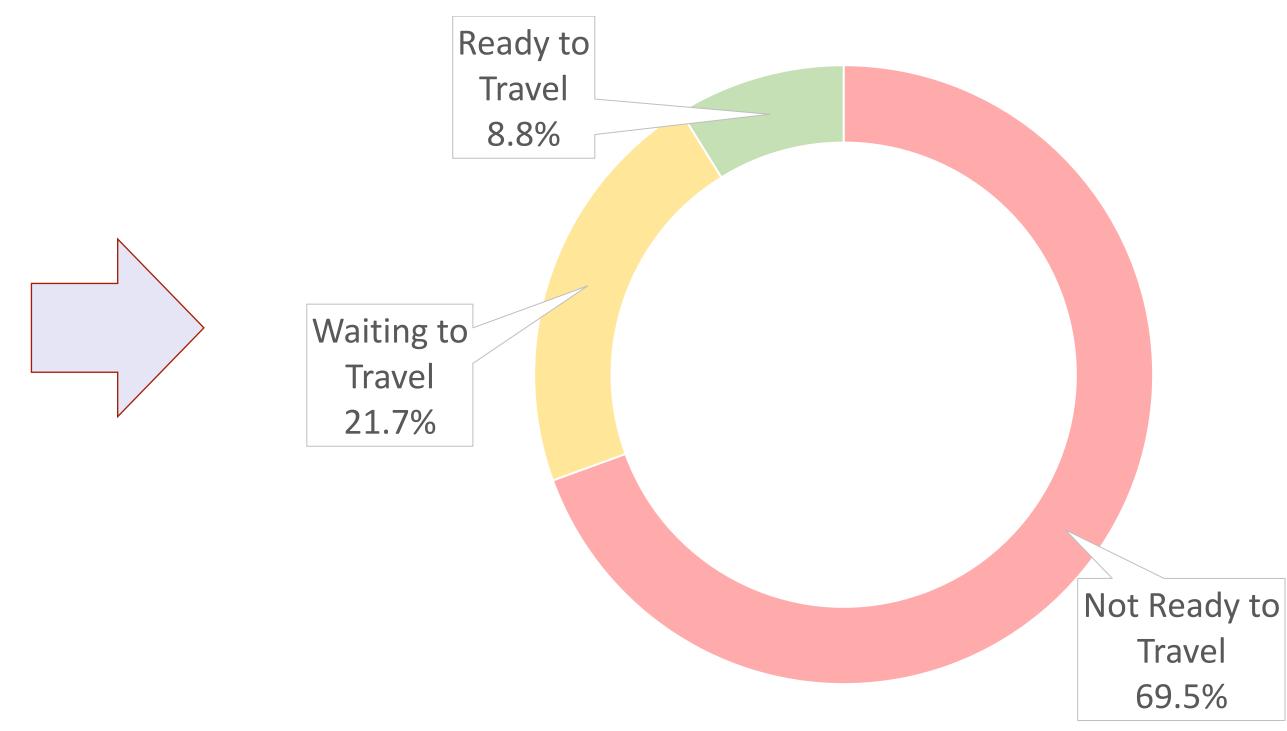
Safety and financial concerns among Affluent respondents dropped this week while non-affluent respondents showed less significant drops or slight growth in those concerns.

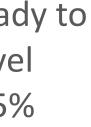
Affluent respondents were the most open to travel related messaging this week, but the least excited about traveling on average.





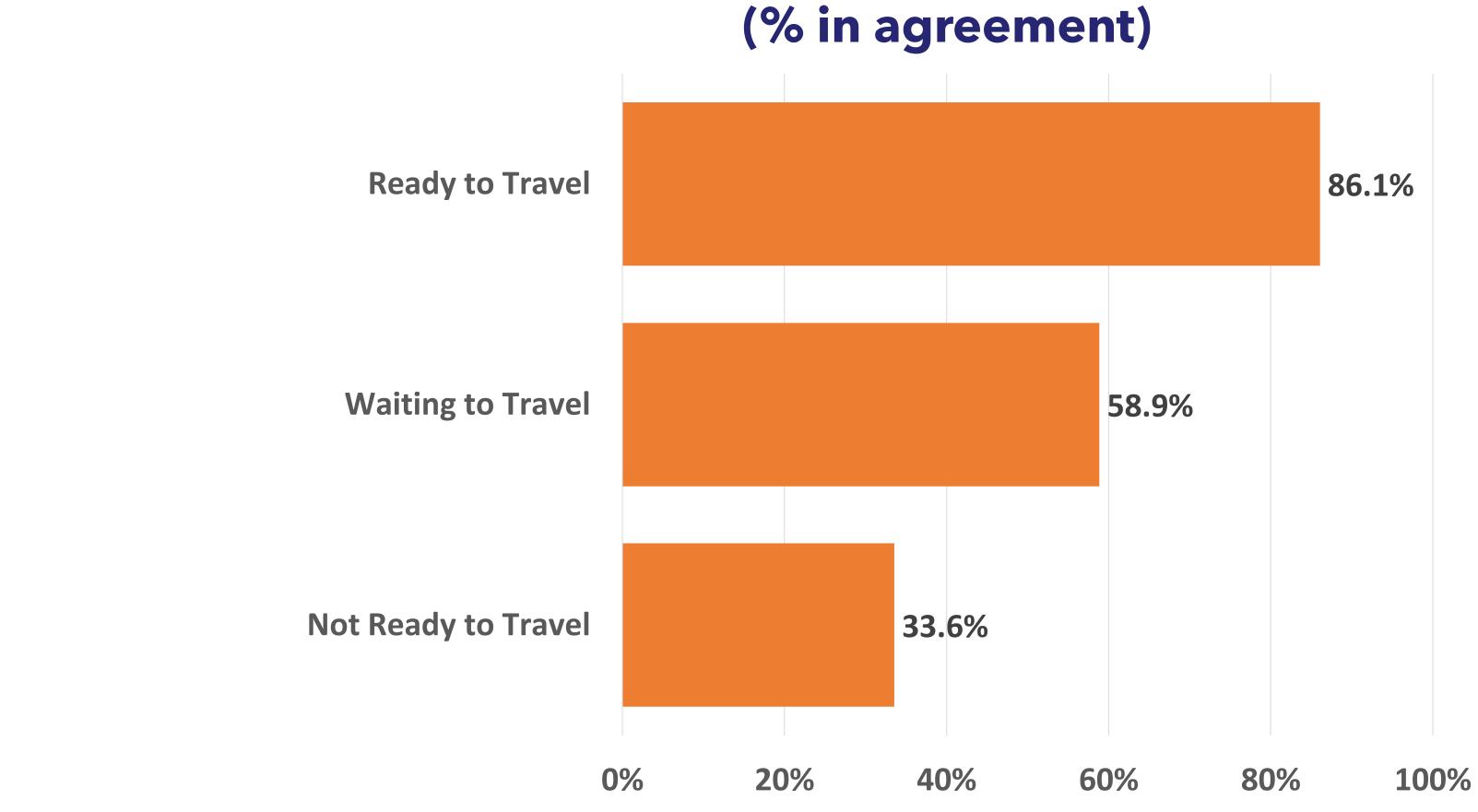
Travel Outlook



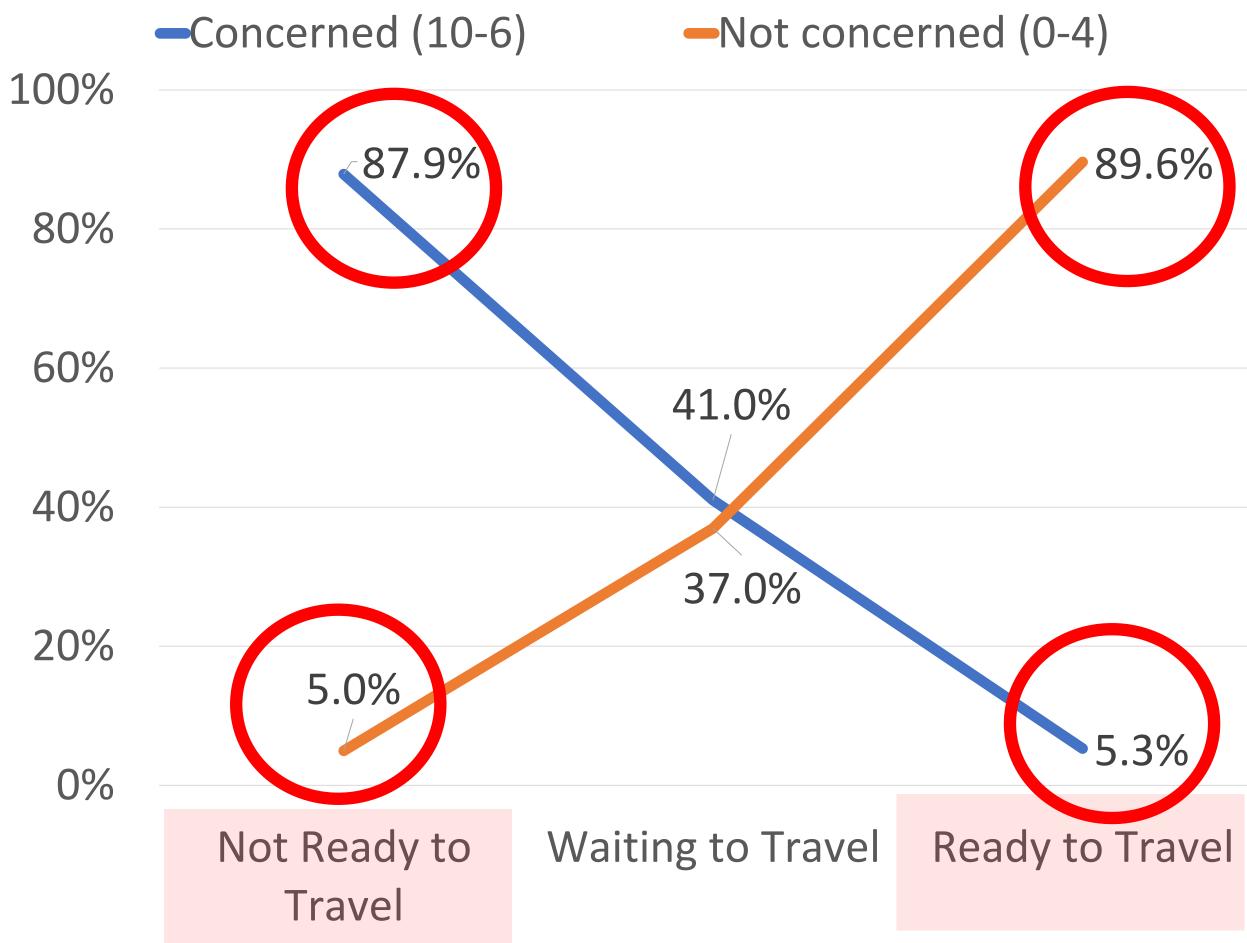


Agreement Statement: Lexpect that I will be traveling in the Fail of 2020.

I expect that I will be traveling in the Fall of 2020



Question: Thinking about the8current coronavirus situation, in6general, how concerned are you6personally about contracting the4virus?2

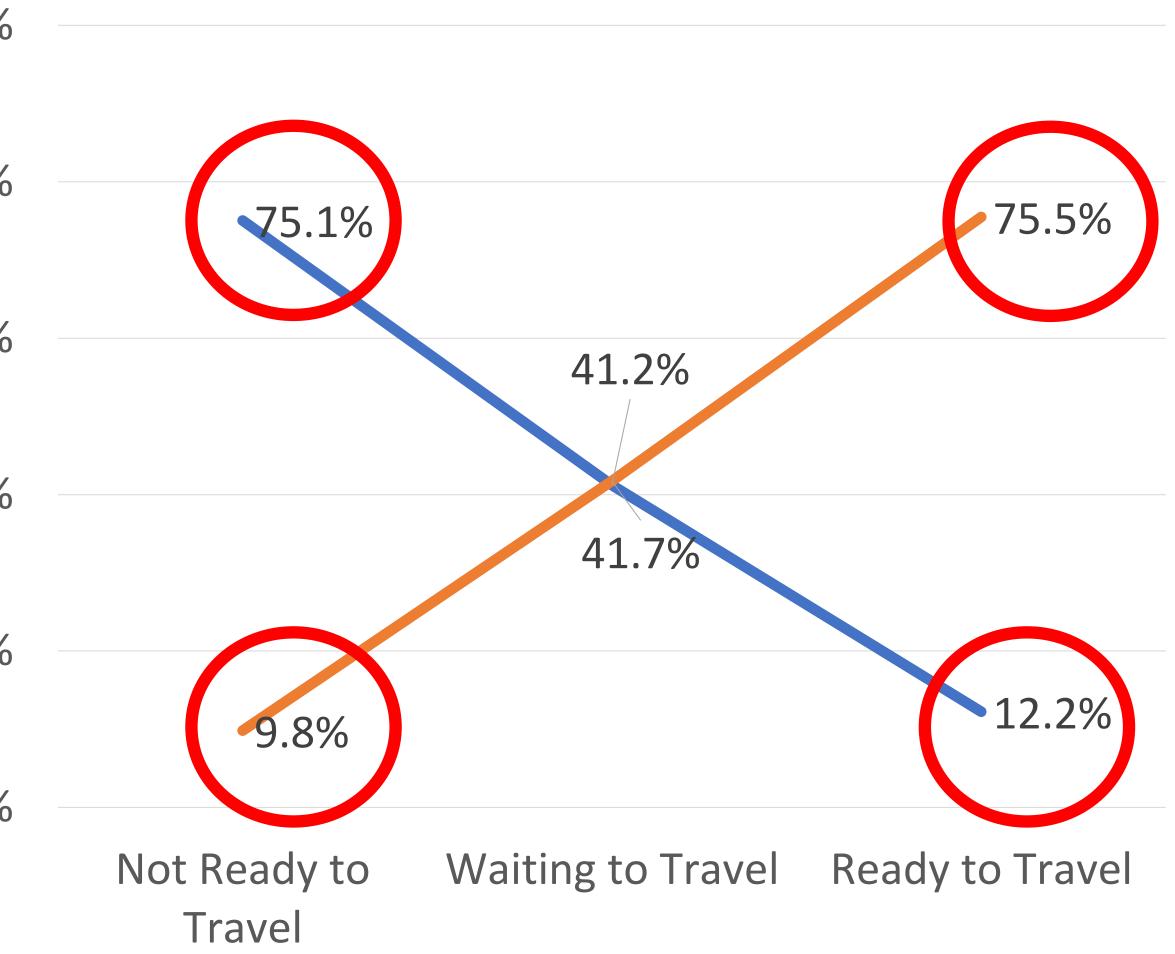


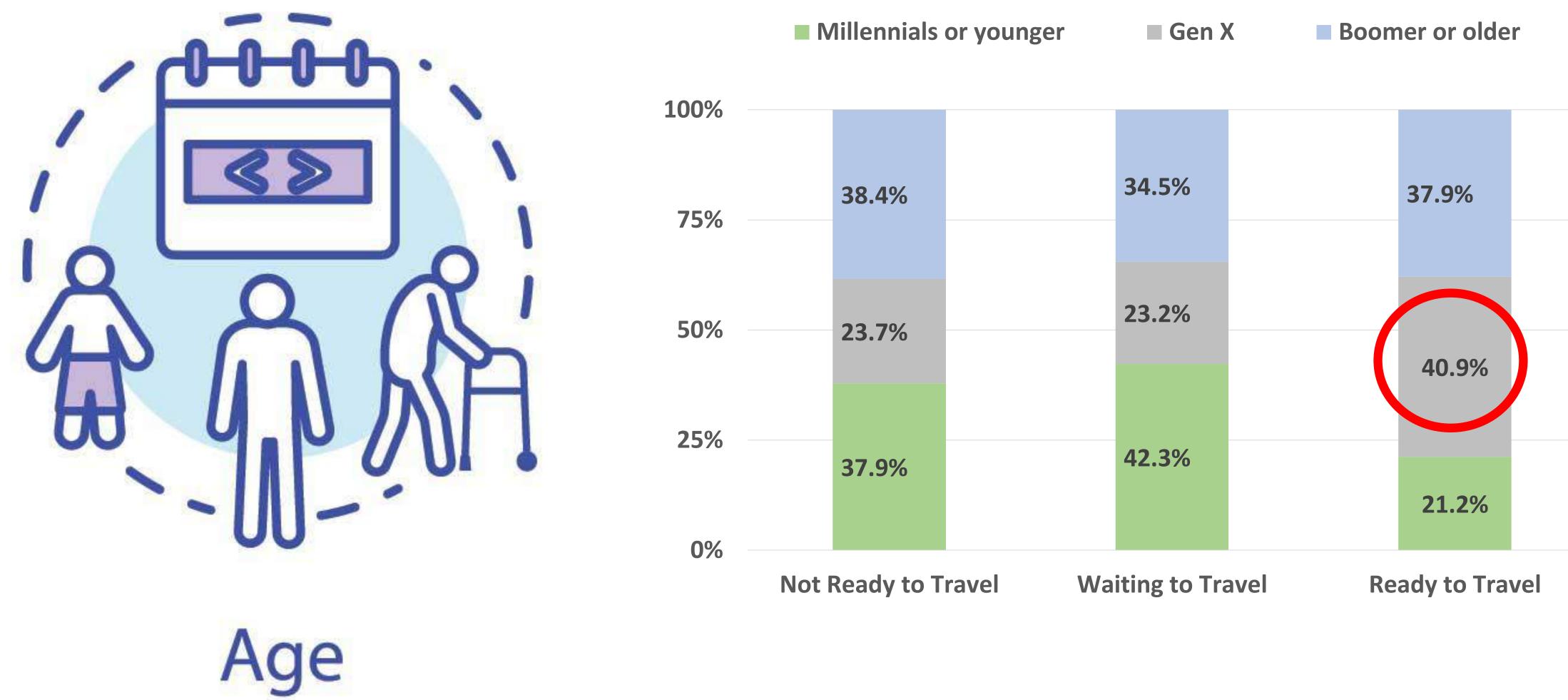
100%

Question: Thinking about the80%current coronavirus situation,60%how concerned are you about the40%impact it may have on your40%personal finances?20%

0%

-Concerned (10-6) -Not concerned (0-4)







Income

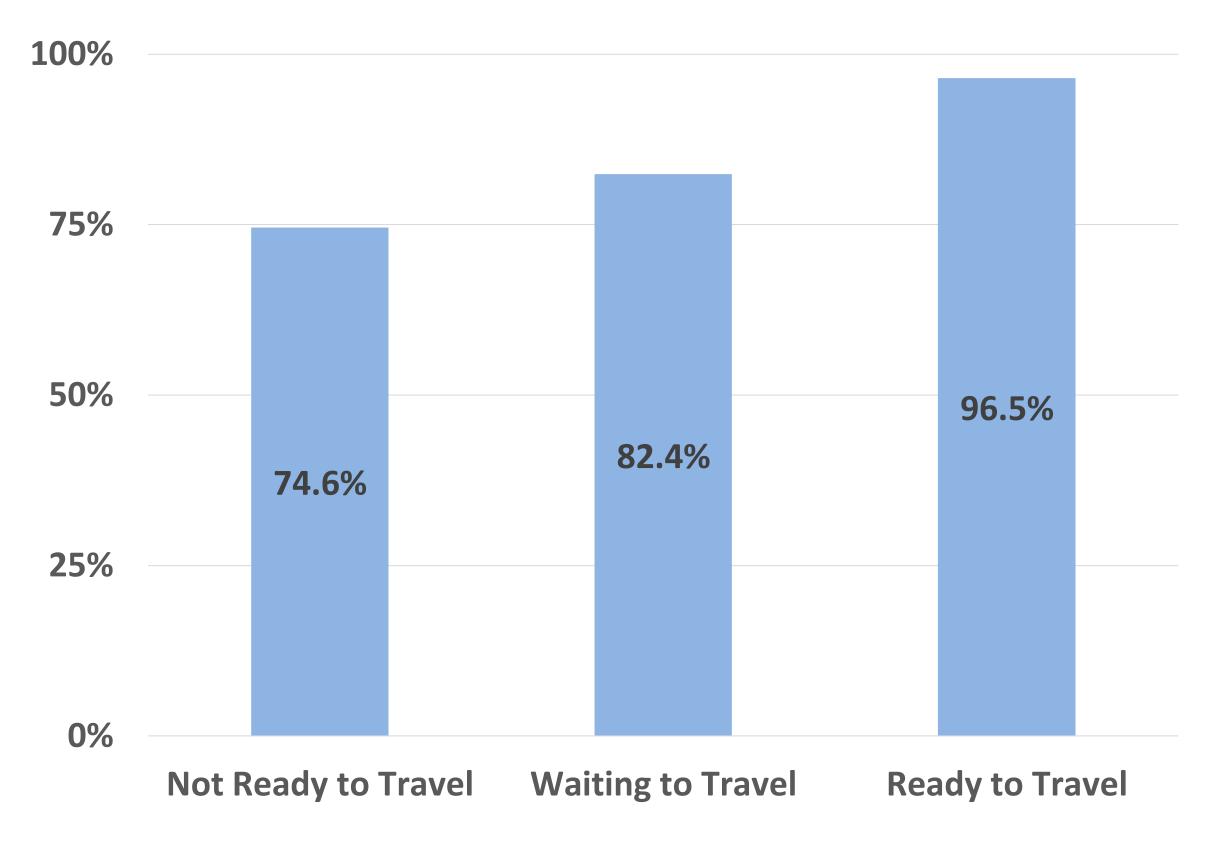
Annual Household Income (in \$1000)

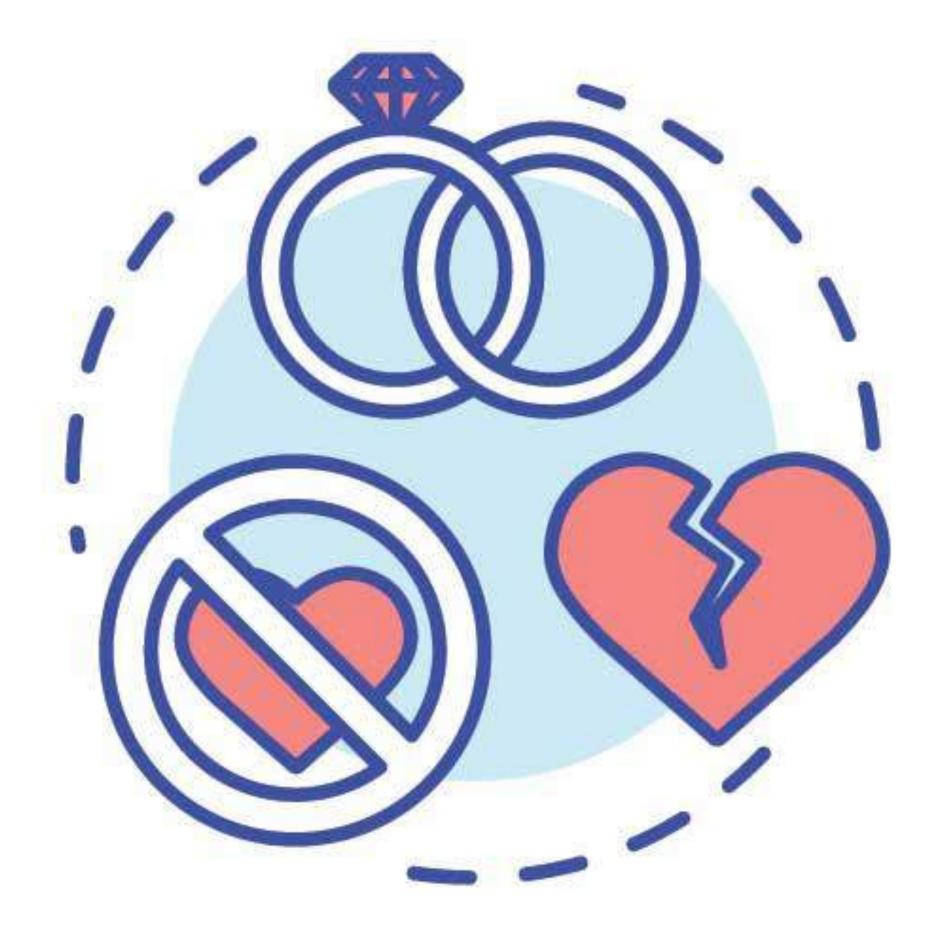




Ethnicity

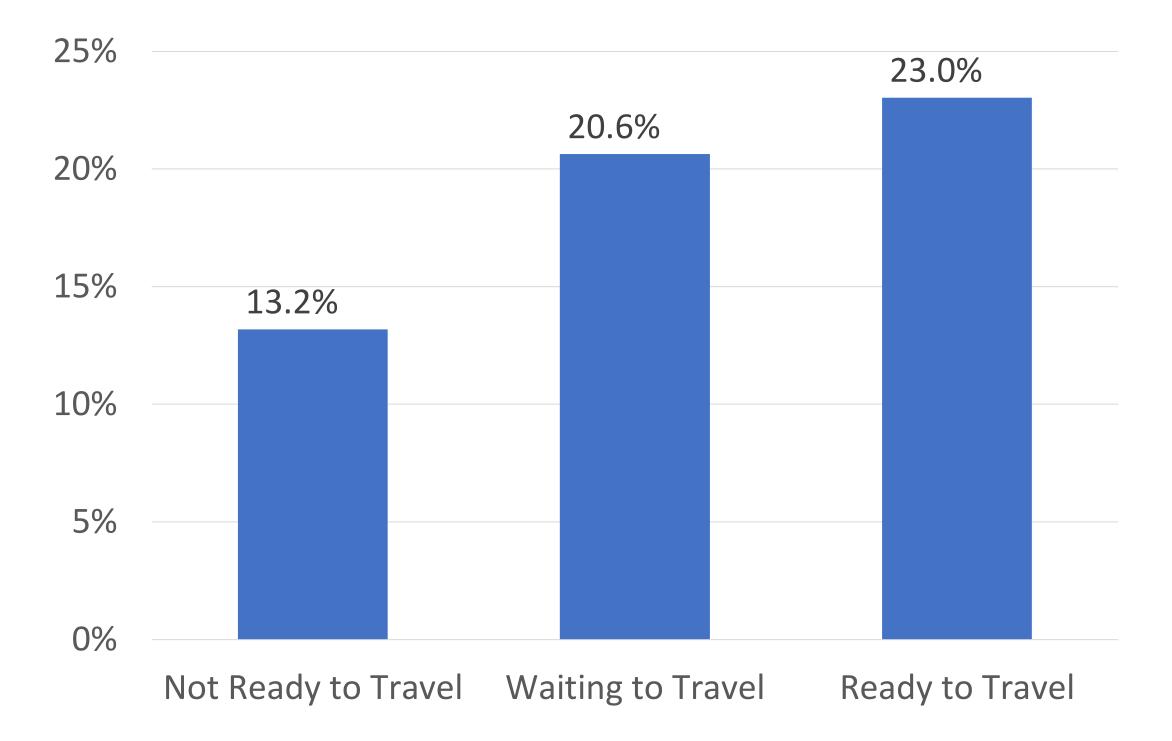
(% Caucasian)

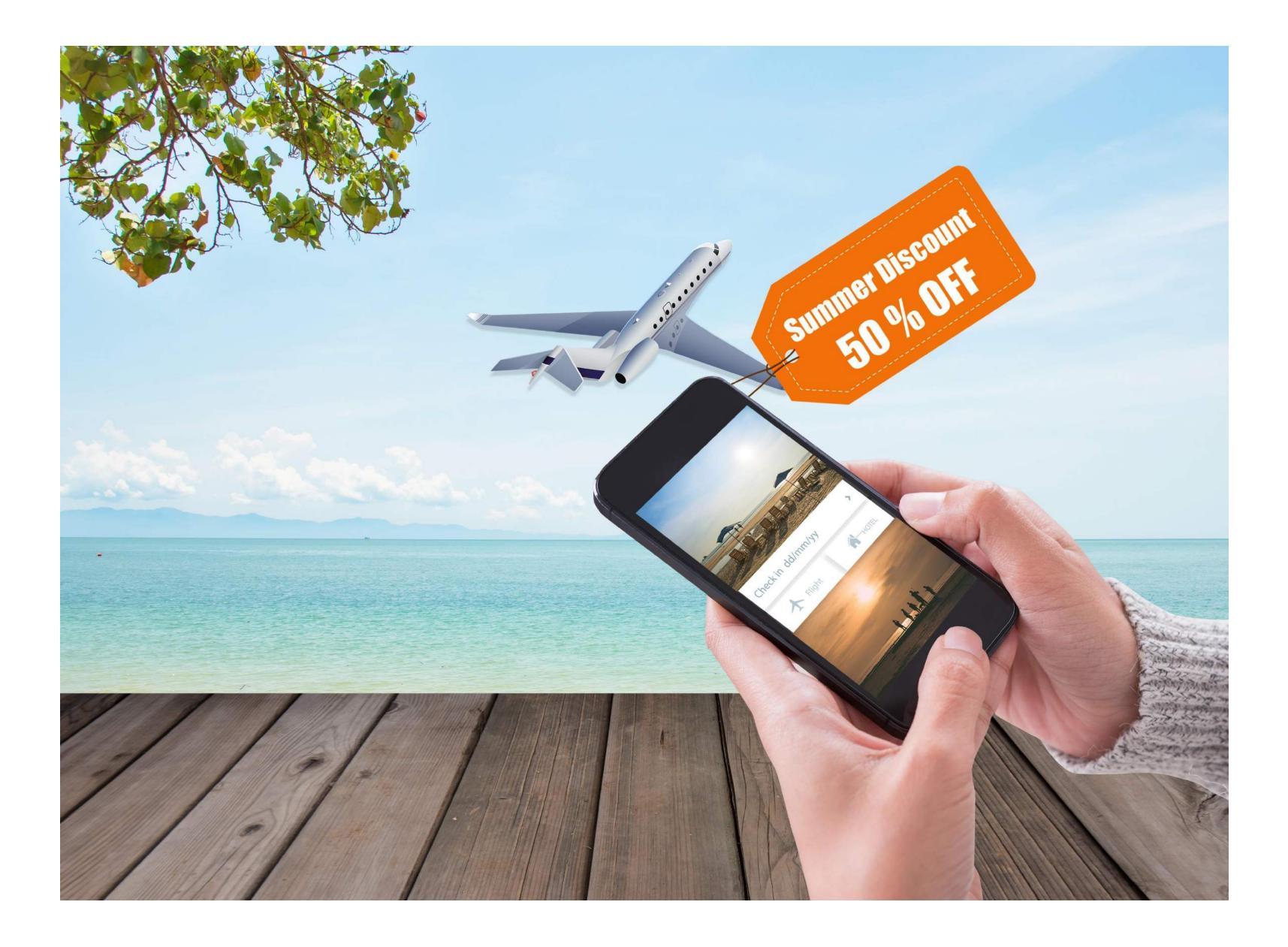




Family status

Children in Household

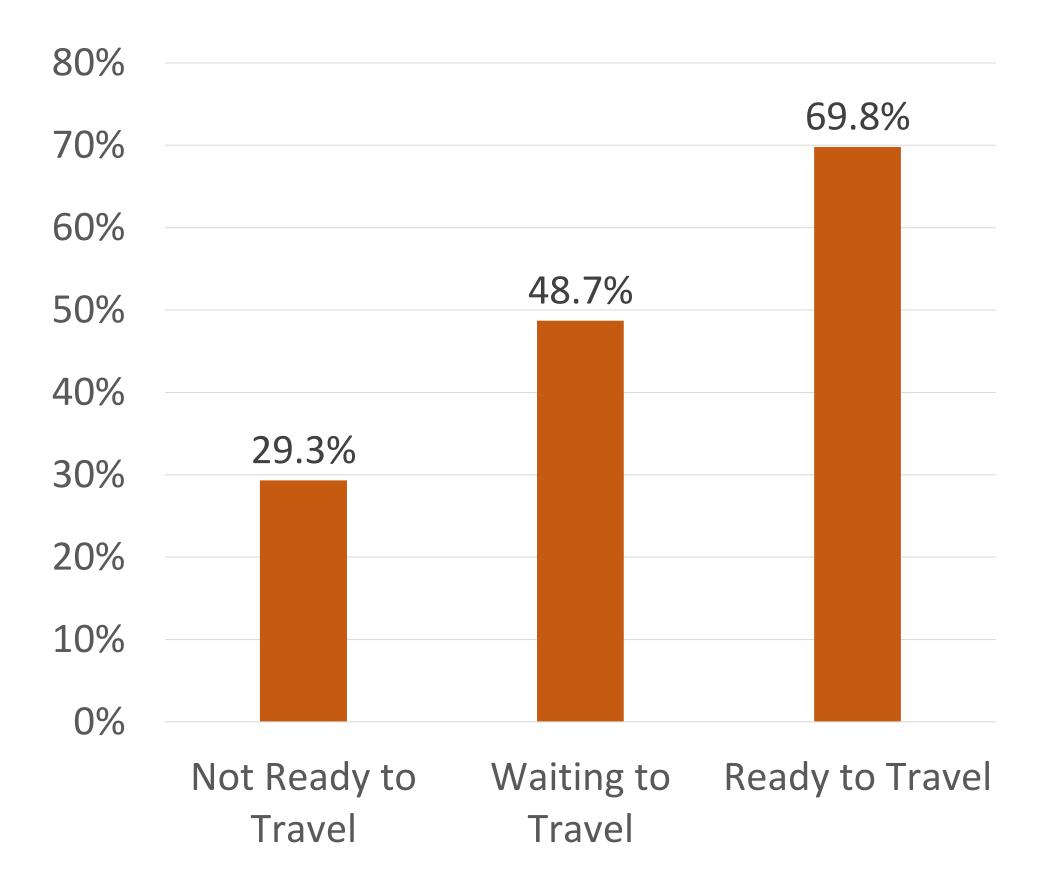




Statement: The Coronavirus has led many travel providers to cut their prices.

These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS. by Ready to Travel BANNER

(% in agreement)

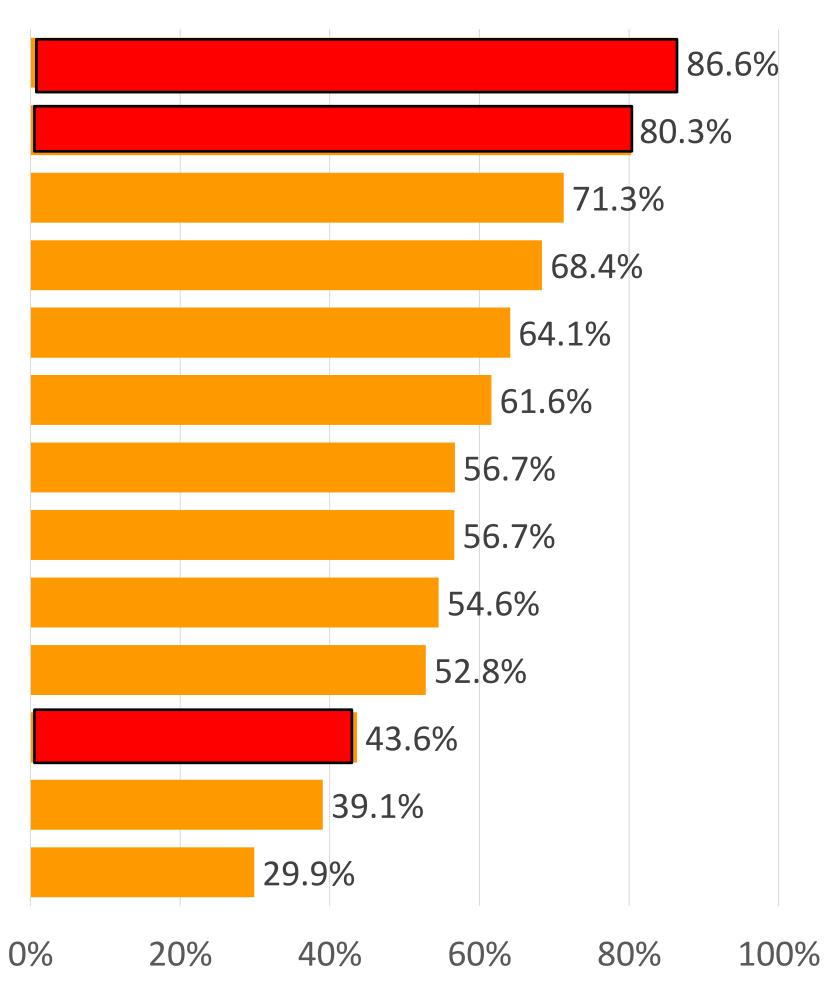


Question: Tell us about your lifestyle priorities in the next six months.

However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.

Ready to Travel (Essential or High priority)

Finding joy or happiness Relaxation Emotional well-being Connecting with others Physical fitness Escape from boredom Connect with nature Escape from stress Making money Have new experiences Staying safe from infection Healing and recovery Learning/education

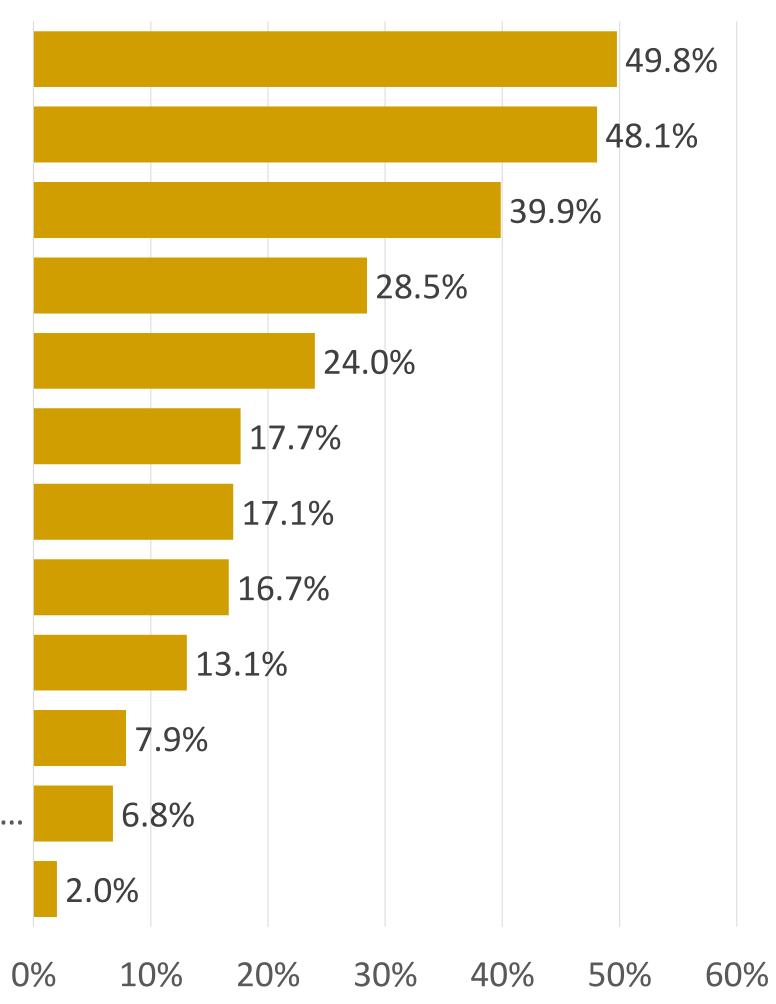


Question: In the next	Spending time
TWELVE (12) MONTHS,	
which of types of travel	
experiences would you	Та
find most relaxing?	ŀ
	Expl

e visiting friends or family Staying at a beach resort Taking a road trip Visiting a National park aking an international trip Attending sporting events loring a city or urban area Visiting a state or regional park Taking a cruise Taking a staycation Attending performing arts shows and...

Visiting arts and cultural institutions

How They Relax







- - Ο

KEY TAKEAWAYS

The travel sentiment index passed important positive threshold this week for both Generation X and rural travelers

While relatively few travelers are fully ready to travel now, a profile of those that are suggests them to be:

• Strikingly unconcerned about the virus or personal economic issues

• Centered in Generation X, Caucasian, affluent, and more likely than others to have kids in their household

• Highly interested in discounts as a travel motivator

Having a unique set of personal priorities, that lack concern for virus issues seen in other travelers

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



RESEA









Brand Performance + Key Audiences for Conversion

Specific Insights into Your Destination

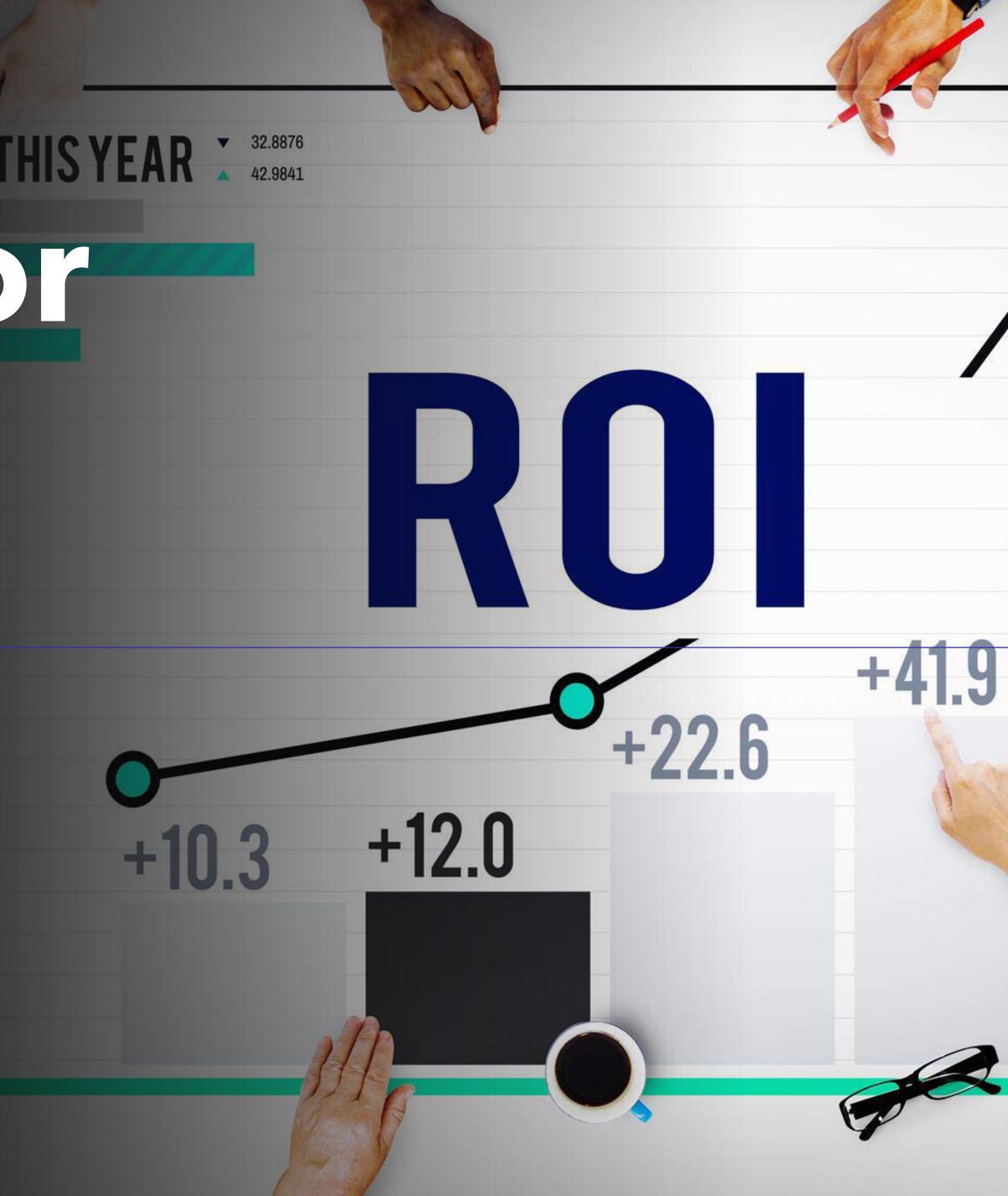




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Resources for OURSM Recovery destinationanalysts.com







Now + Upcoming for You

- Early Insights from the DMO Website Importance Study
- Meeting Planner Sentiment Survey Findings
- International Sentiment
- Online Focus Groups with Travelers
- Traveler Segment Profiles







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

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

Send suggestions or requests for questions to:



