



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**PRESENTATION OF FINDINGS
WEEK OF JULY 27TH, 2020**

Destination  Analysts



Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.



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 group of hands holding light bulbs, symbolizing ideas and innovation.

**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars

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

THANK YOU
so much to our clients and partners who have

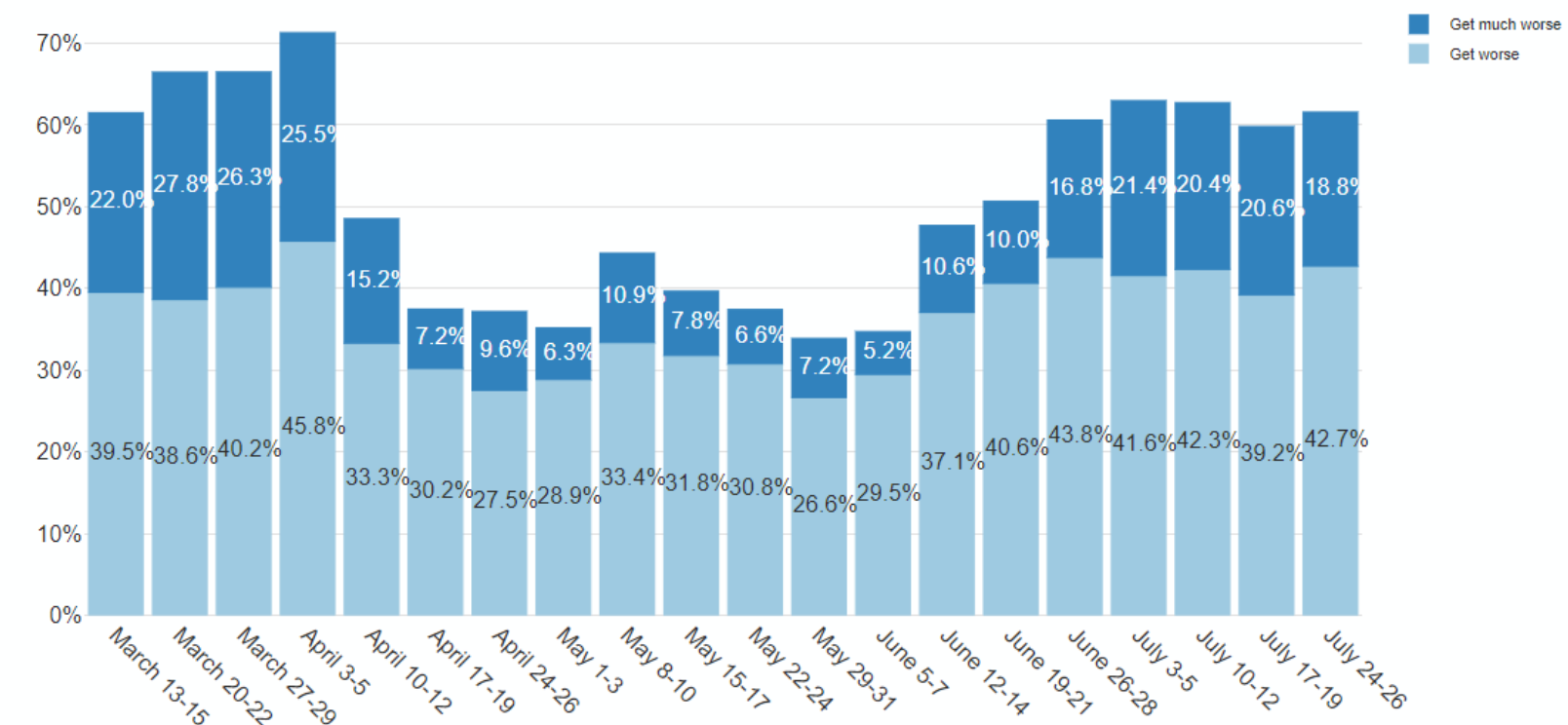
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Coronavirus Travel Sentiment I...
Last published: 07/27/2020 18:15:43

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Anticipated Change in Coronavirus Situation - Time Series



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)

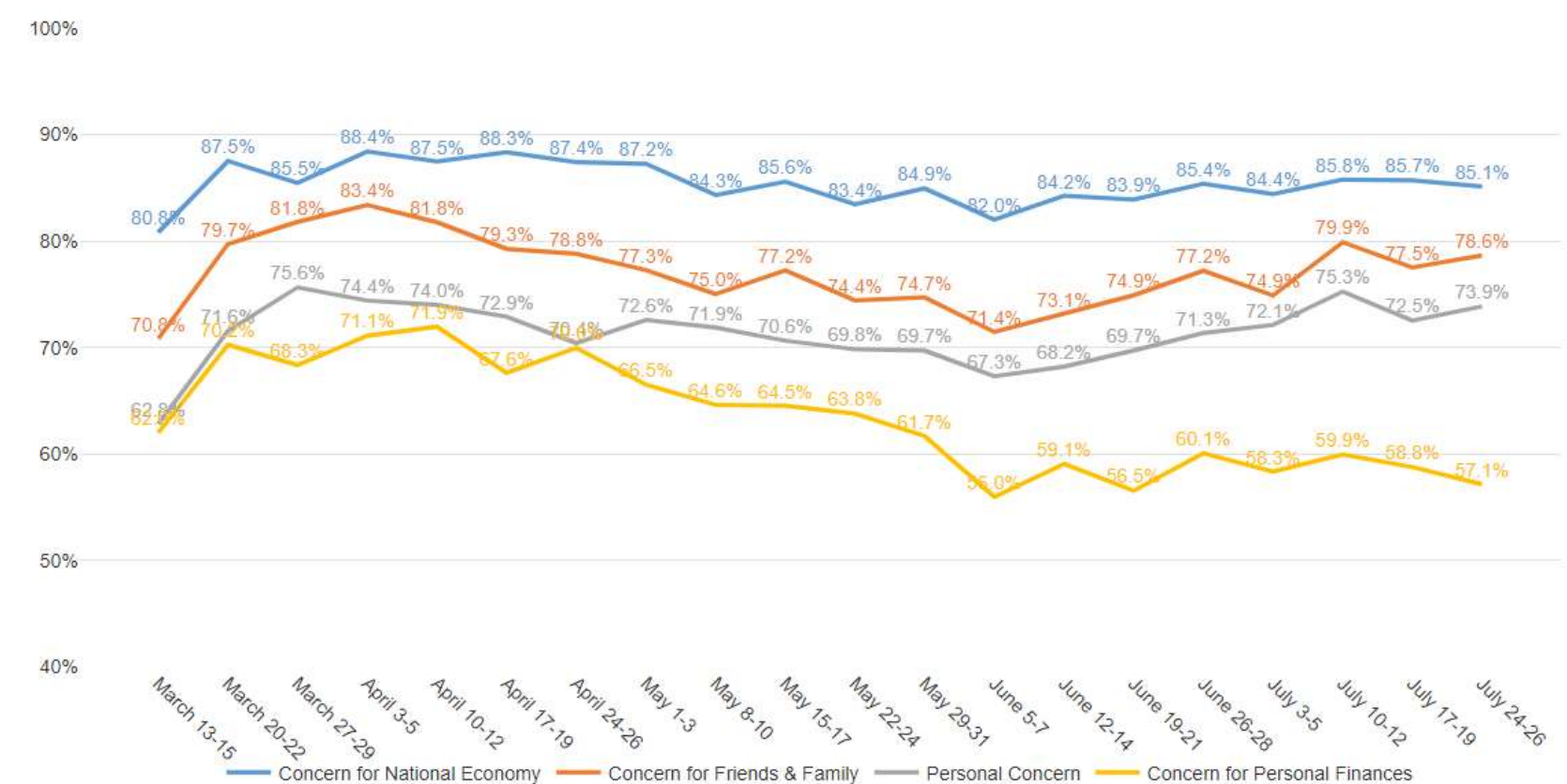
Base: All respondents. 24471 responses.

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Coronavirus Travel Sentiment I...
Last published: 07/27/2020 18:15:43

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|---------------------------------------|
| Project Overview |
| Topline Findings |
| Concerned Personally |
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| Concerned for Friends/Family |
| Concerned for Friends/Family - Break |
| Concerned for Personal Finances |
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| Destinations Associated with Corona |
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| How Travel Was Affected by Coronav |
| How Travel Was Affected by Coronav |
| How Travel Was Affected by Coronav |
| Why Travel Was Affected by Coronav |
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| Why Travel Was Affected by Coronav |
| Number of Trips Cancelled/Postpone |
| Number of Trips Cancelled - Breakou |
| Number of Trips Postponed - Breako |
| Length of Trips Cancelled/Postponed |
| Party Size of Trips Cancelled/Postpor |
| Month of Trips Cancelled |
| Month of Trips Cancelled - Breakout |
| Refunds for Cancelled Reservations |
| Rescheduled Postponed Trips |
| Month of Rescheduled Postponed Tri |
| Month of Rescheduled Postponed Tri |
| Type of Trips Cancelled Or Postpone |
| Type of Trips Cancelled Or Postpone |
| Destination Types Cancelled Or Post |
| Destination Types Cancelled Or Post |
| International Trips Cancelled Or Post |
| Business Travel Restrictions |
| Business Travel Restrictions - Breako |
| Traveler Perceptions and Expectations |
| Travel Plans |
| Upcoming Travel Plans |
| Upcoming Travel Plans - Breakout |
| Month of Next Airline Trip |
| Distance of Next Airline Trip |

Concern - Time Series



Base: All respondents. 24471 responses.

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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 20 data (fielded July 24-26) 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





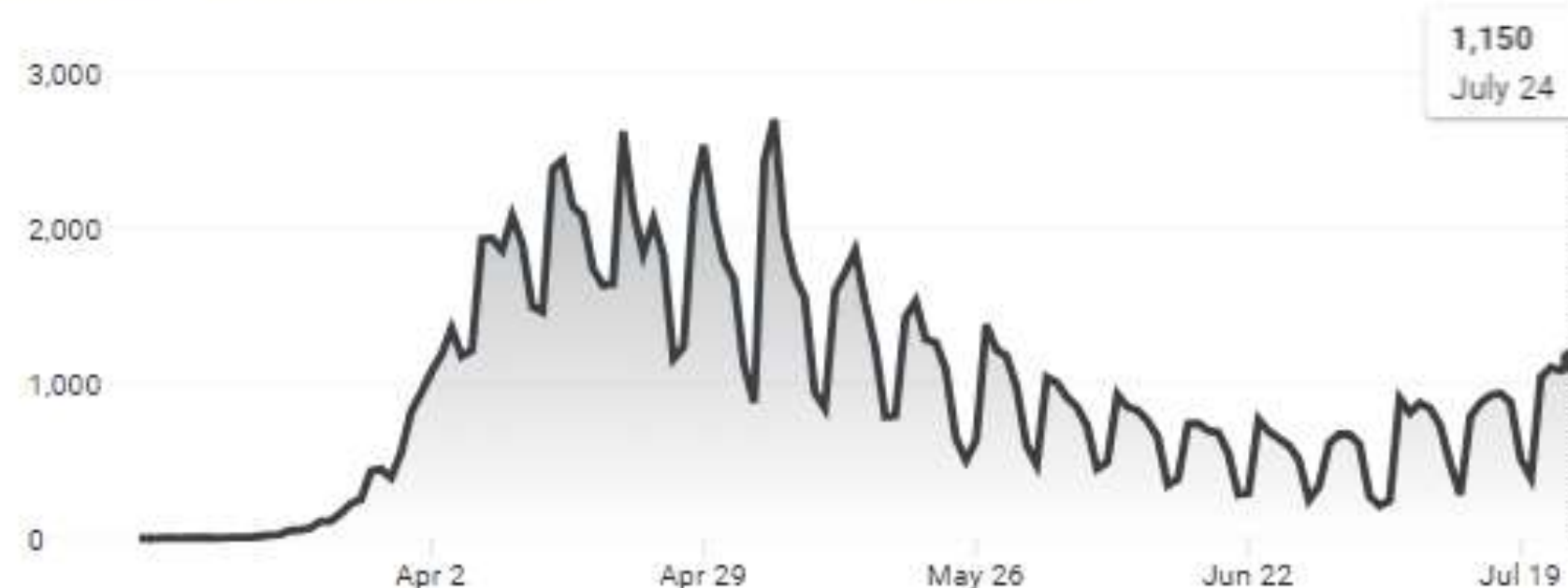
Daily change

Deaths

United States

All regions

All time



Each day shows deaths reported since the previous day · Updated less than 20 mins ago · Source: [Wikipedia](#) · [About this data](#)

Total cases

Total

United States

All regions

Confirmed
4.19M
+74,360

Deaths
148K
+1,150

| Location | Confirmed ↓ | Deaths |
|------------|-----------------|---------------|
| California | 448K | 8,346 |
| New York | 416K +750 | 32,295 +10 |
| Florida | 415K +12,444 | 5,776 +135 |
| Texas | 384K +8,701 | 4,884 +196 |
| New Jersey | 181K +458 | 15,776 |

Washington Examiner

Parents stuck in impossible school reopening conundrum

by Kristen Soltis Anderson, Contributor | July 22, 2020 01:53 PM



The debate over how to move forward with K-12 schooling is growing more heated as back-to-school season nears, with teachers resisting the push to reenter the classroom so long as COVID-19 remains a risk and others, such as President Trump, calling for reopening this fall.

COVID-19 vaccine is safe and triggers immune response in human trial

According to a new study, a Chinese phase II clinical trial of a COVID-19 vaccine candidate has shown that it is safe and induces an immune response.



The results of a phase II clinical trial show that a new COVID-19 vaccine is safe and able to trigger an immune response.

With over 15 million confirmed cases of the new coronavirus, SARS-CoV-2, and more than 624,000 COVID-19 deaths [globally](#), scientists around the world are competing against time to fast-track the development of new treatments to combat the disease.

Globally, scientists are developing about 250 candidate vaccines against SARS-CoV-2 infection. Of these, to date, [at least 17](#) are under evaluation in clinical trials.

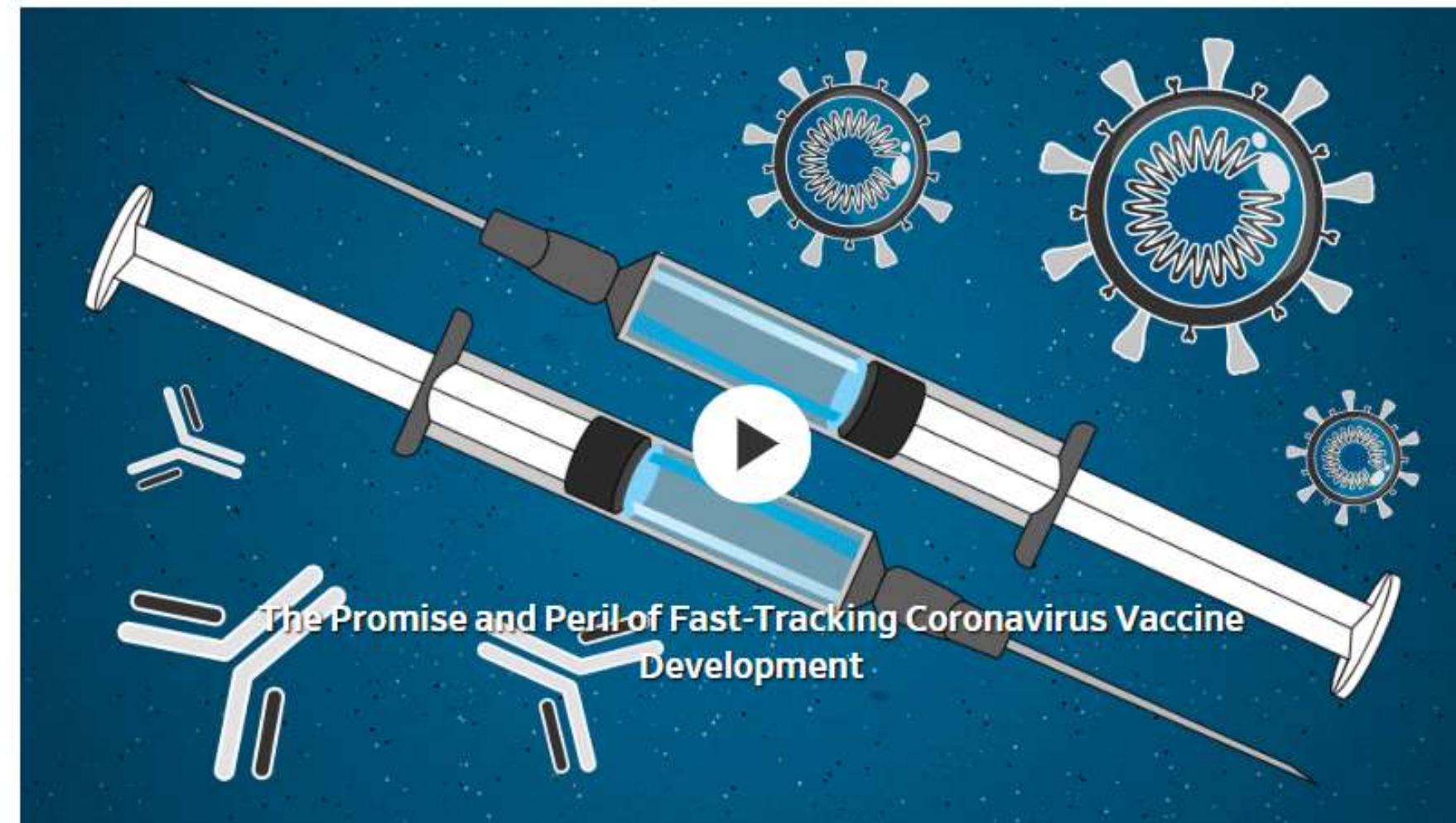
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China Says It Will Have Covid-19 Vaccine Ready This Year

Chinese companies make headway in global race to produce the first coronavirus vaccine



As the coronavirus continues to spread around the globe, companies and academic labs are racing to develop a vaccine that would help society get back to normal. But there could also be costs to moving too quickly. WSJ's Daniela Hernandez explains. Photo illustration: Laura Kammermann

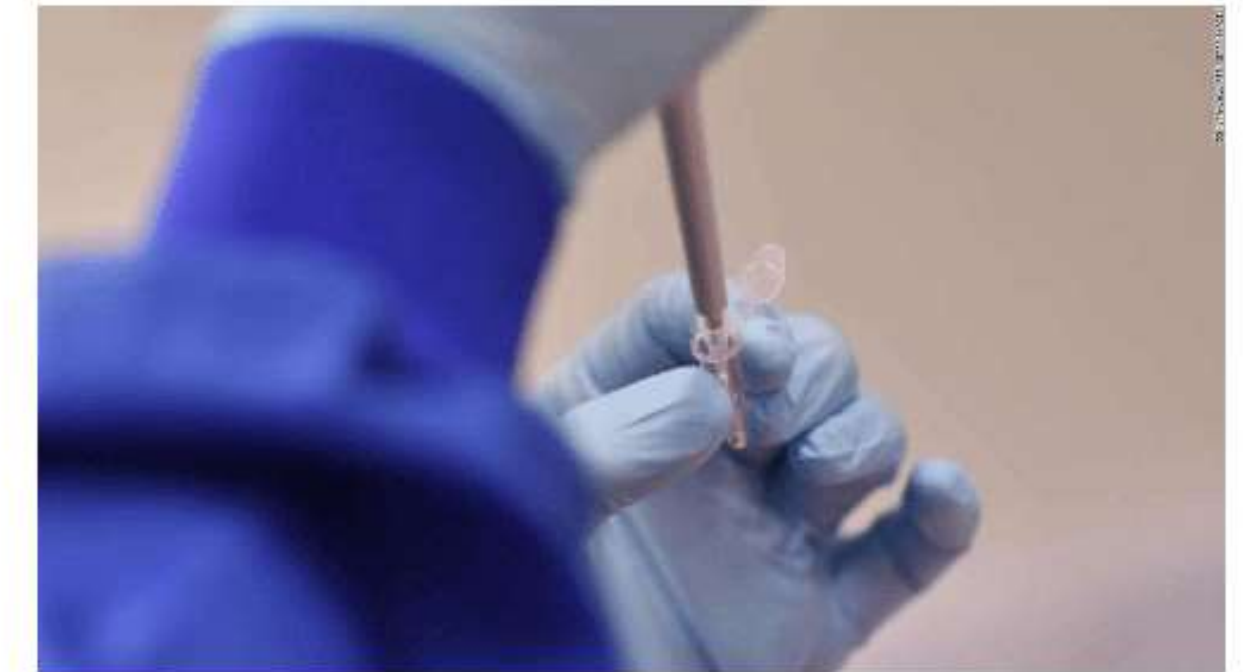


Coronavirus vaccine: The first Phase 3 vaccine trial in the US is expected to begin next week

By Andrea Kane, CNN · 3 hrs ago



Much of the world has pinned its hopes on a vaccine as a way out of the [Covid-19 pandemic](#) that has infected more than 15 million and killed more than 630,000 people globally.



© BEN STANSALL/AFP/Getty Images Scientists are trying to develop a vaccine for COVID-19 illness.

The World Health Organization says there are 25 potential coronavirus vaccines in clinical trials internationally.

Here in the United States, the government has put its money behind several different vaccine candidates through [Operation Warp Speed](#).

One of those vaccines is being developed by the [Vaccine Research Center](#) at the National Institutes of Health's National Institute of Allergy and Infectious Diseases, in partnership with the biotechnology company Moderna. The vaccine is expected to enter Phase 3 testing next week. This phase of the trial is expected to involve 30,000 volunteers and will test whether the vaccine protects people against the coronavirus.



Fauci tells MarketWatch: I would not get on a plane or eat inside a restaurant

Published: July 25, 2020 at 9:13 a.m. ET

By [Quentin Fottrell](#)

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'We are still in a pretty big first wave,' says Dr. Anthony Fauci, the veteran epidemiologist



Dr. Anthony Fauci is consistently rated as the country's most trusted voice on the coronavirus: 'There are different phases in trying to open America again.' Source: MarketWatch photo illustration/Getty Images, iStockphoto.



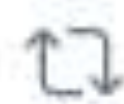
Donald J. Trump  @realDonaldTrump · Jul 20



We are United in our effort to defeat the Invisible China Virus, and many people say that it is Patriotic to wear a face mask when you can't socially distance. There is nobody more Patriotic than me, your favorite President!



153.8K



110.6K



323.2K



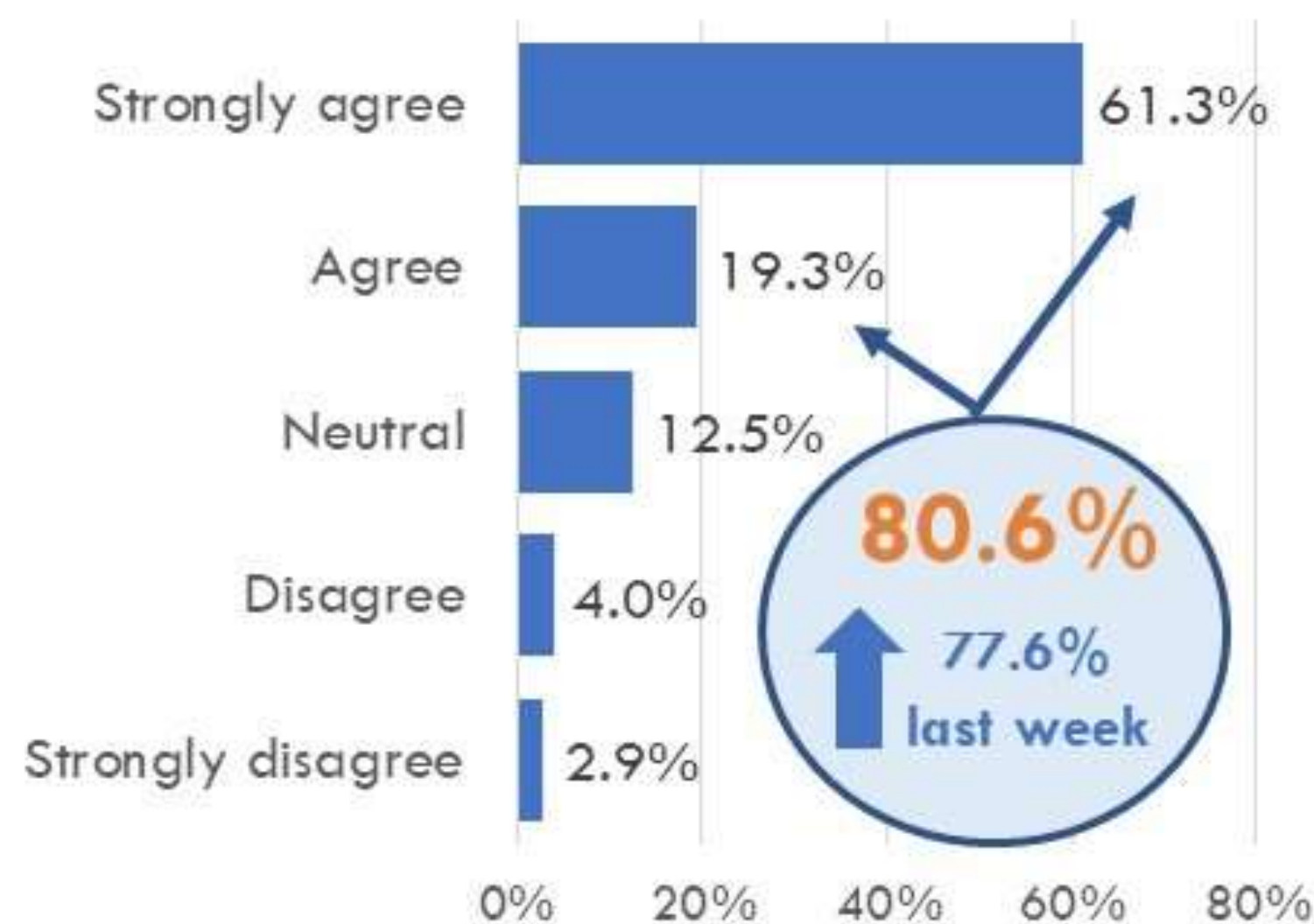


INCREASING PANDEMIC ETIQUETTE

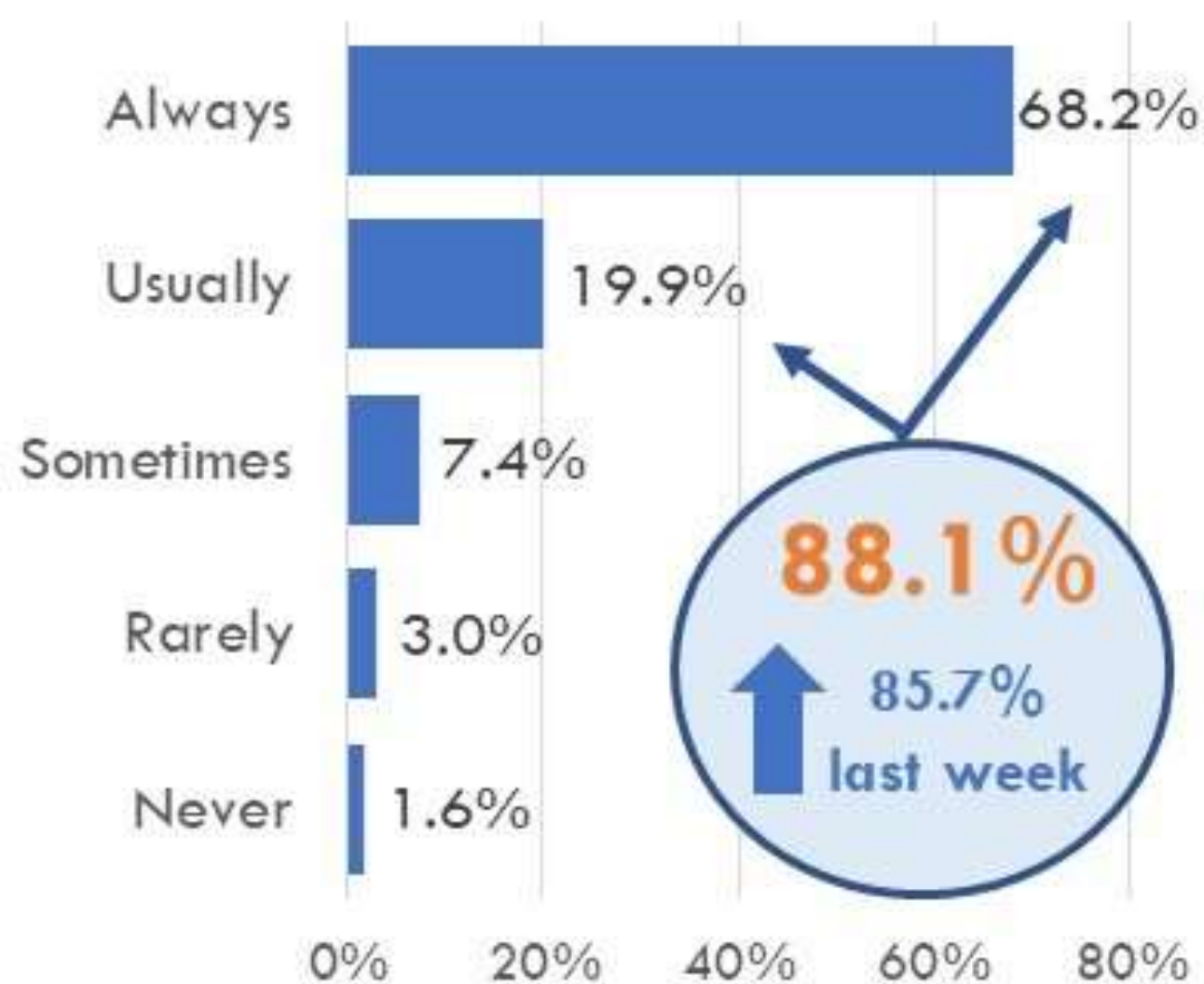
AS OF JULY 26TH, 2020



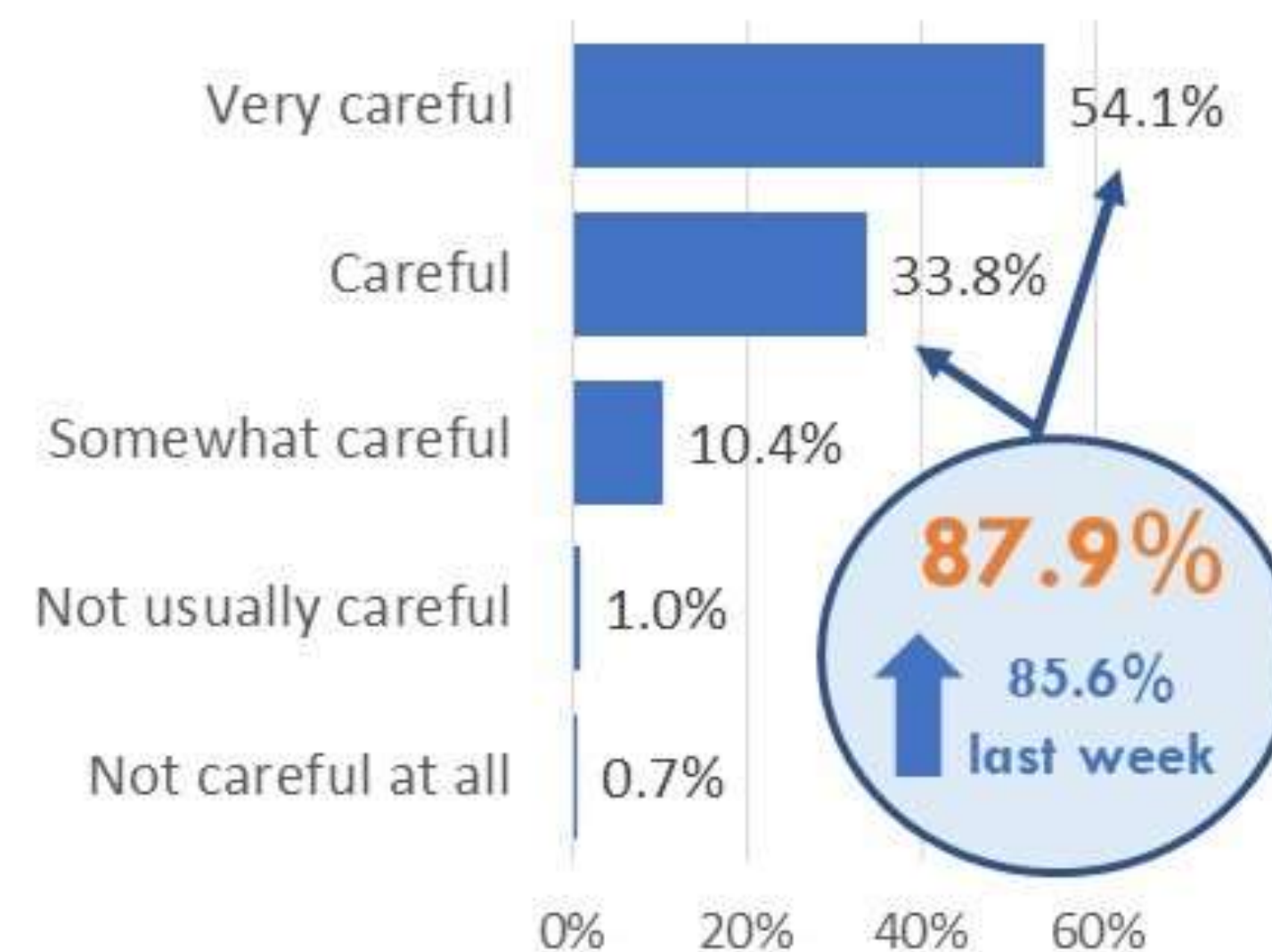
Agreement People Should Wear Face Masks in Public



Frequency of Mask Usage



Care Put into Social Distancing



Source: Destination Analysts' Coronavirus Traveler Sentiment Index Study. Data Collected July 24-26, 2020

HOW MUCH PROGRESS ARE WE MAKING?



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

Feelings About Traveling Now

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

(Base: All respondents 1,257 completed surveys. Data collected July 17-19, 2020)

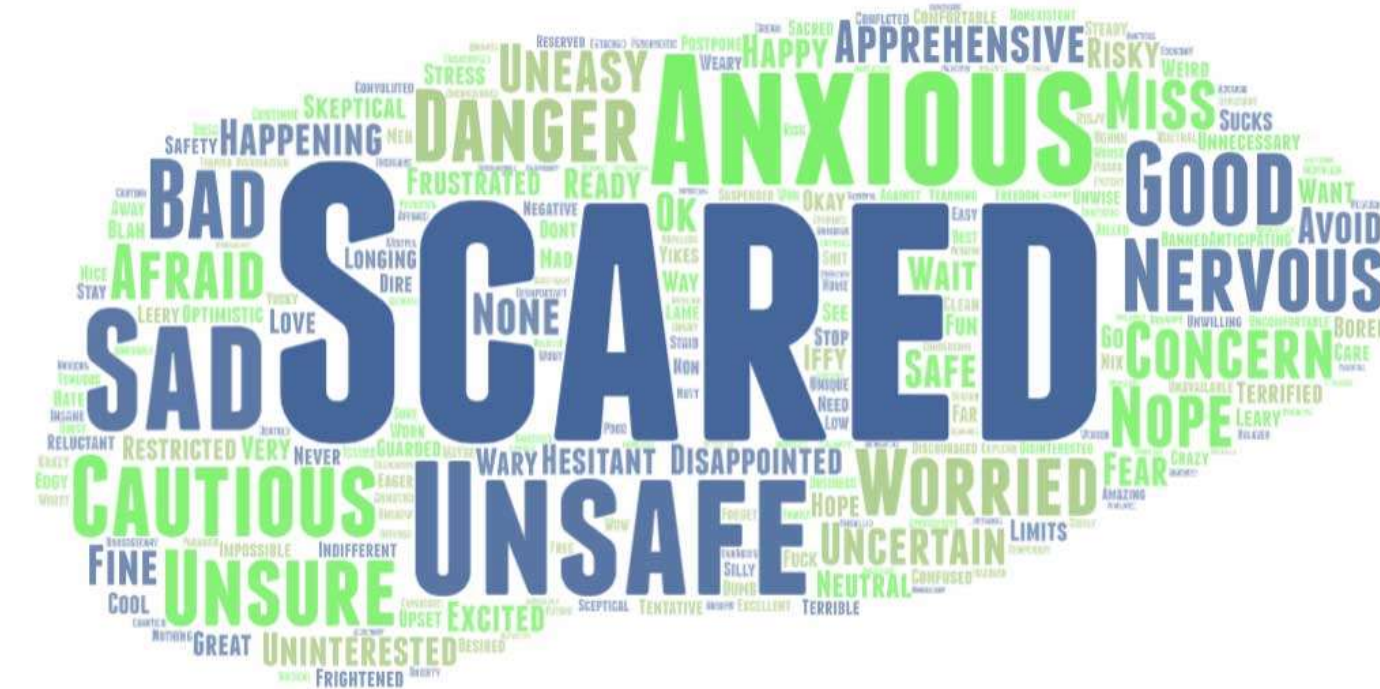


Feelings About Traveling Now: Historical Perspective

March



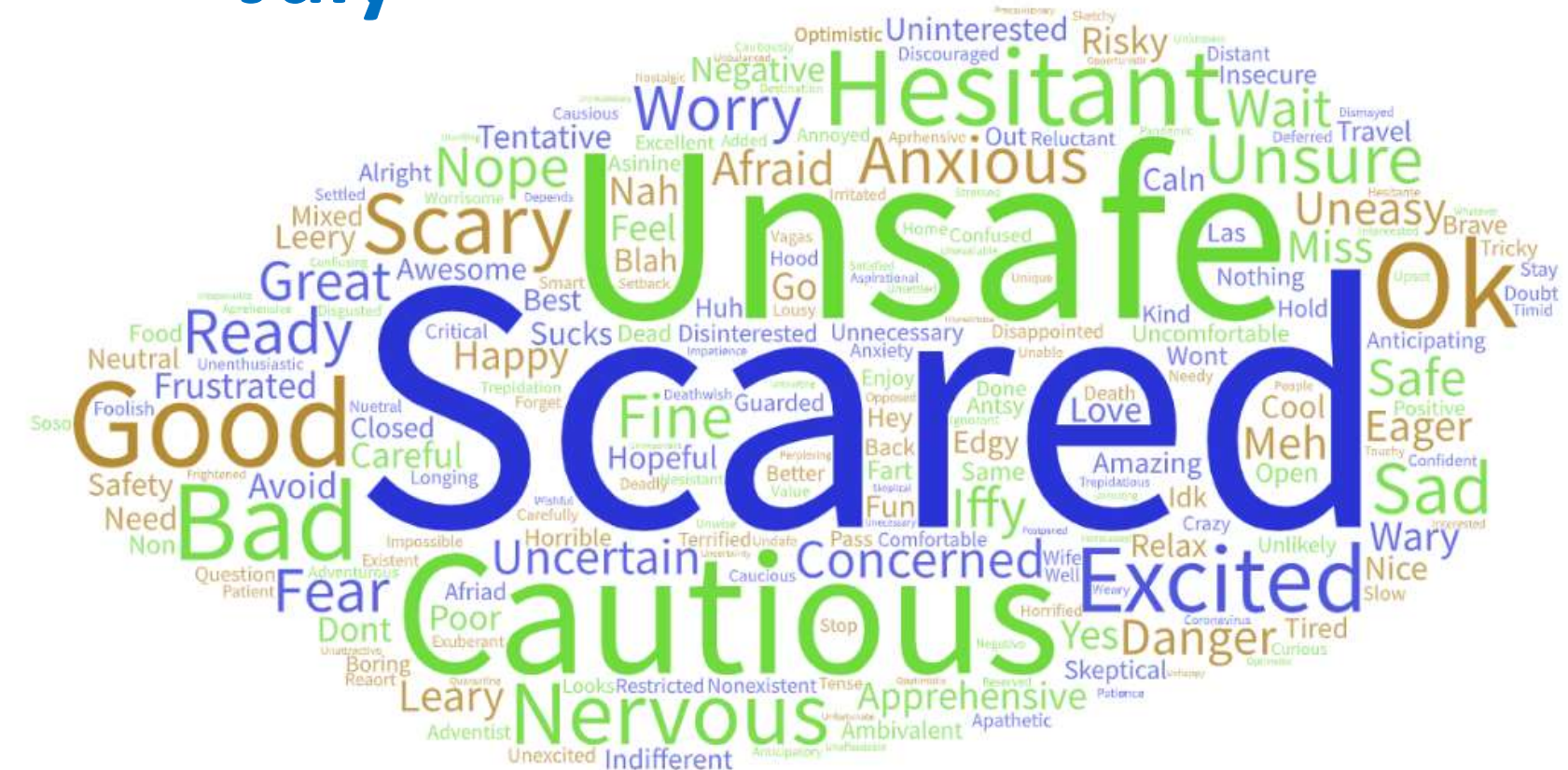
April



May



July

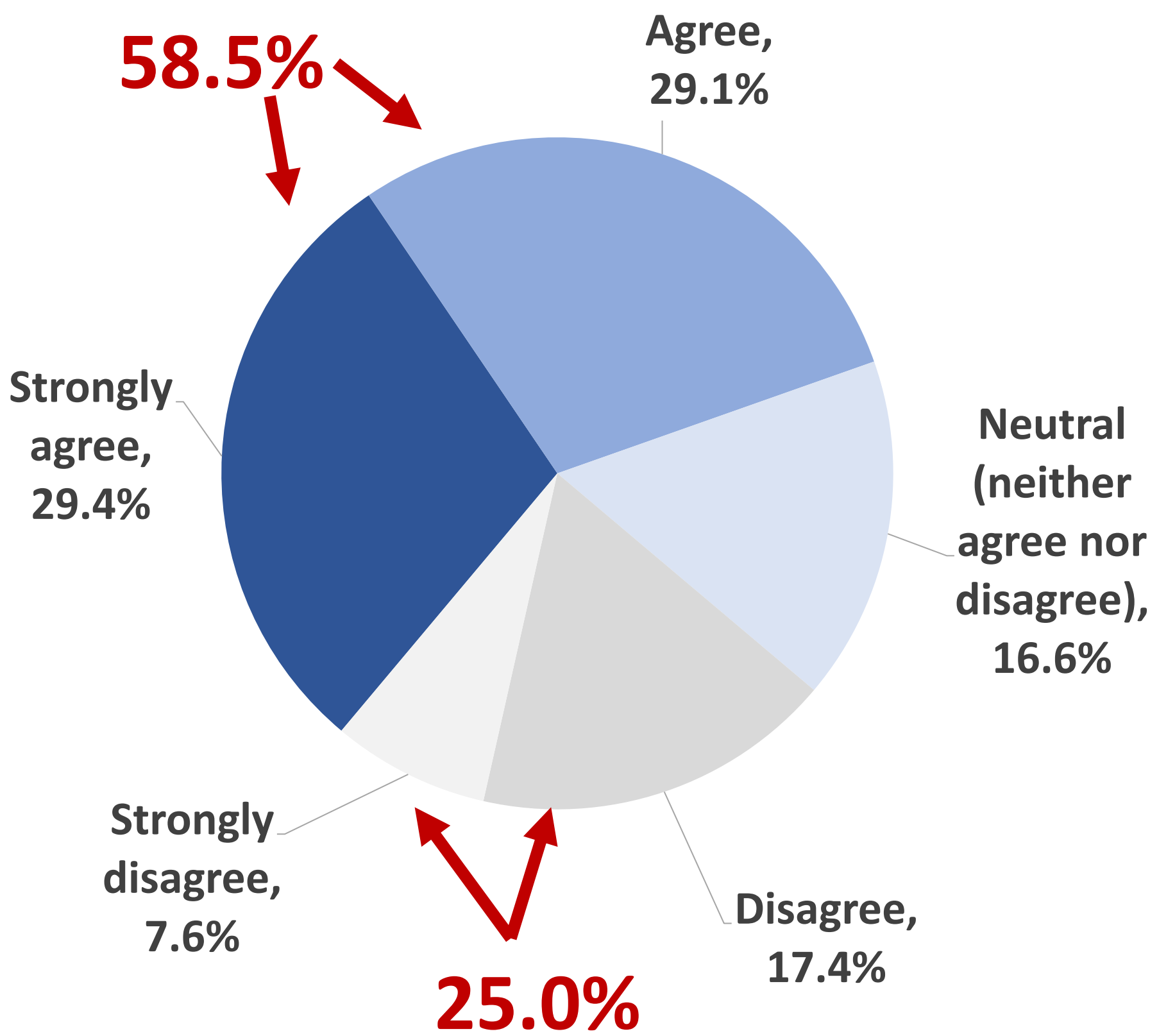


Question: What ONE WORD best describes how you feel about travel right now?

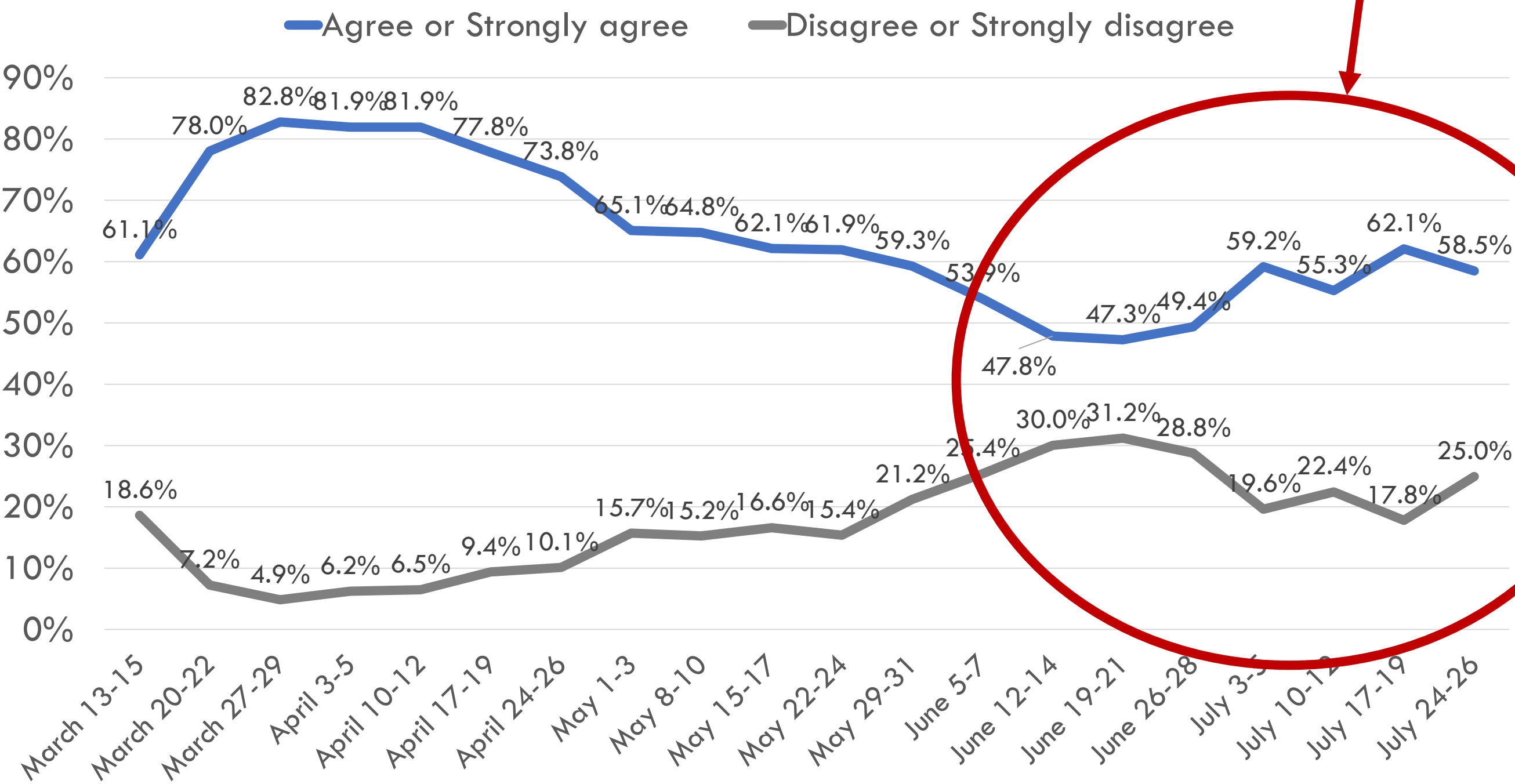
Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

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



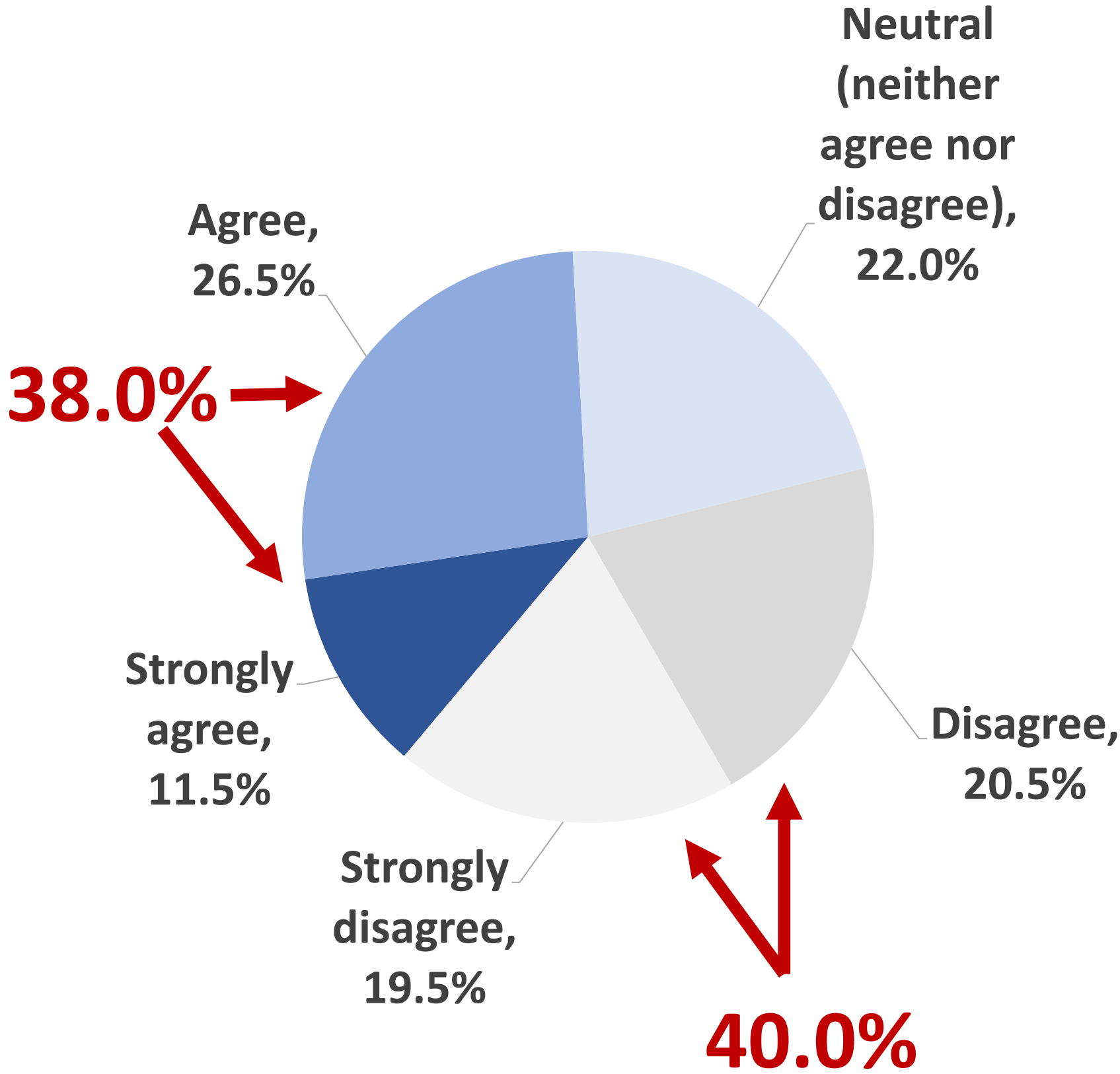
Historical data



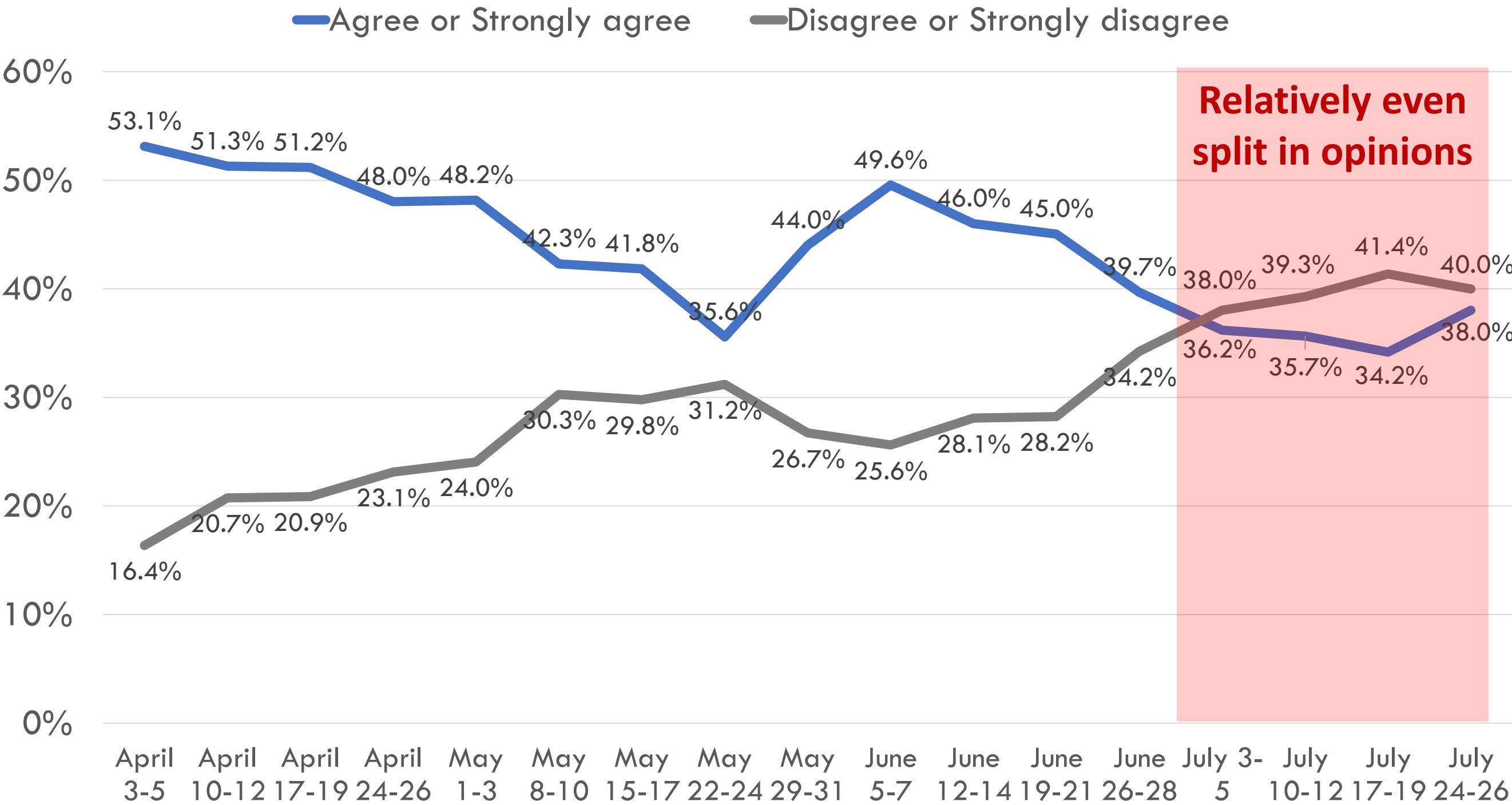
Expectations for Traveling in the Fall

How much do you agree with the following statement?

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



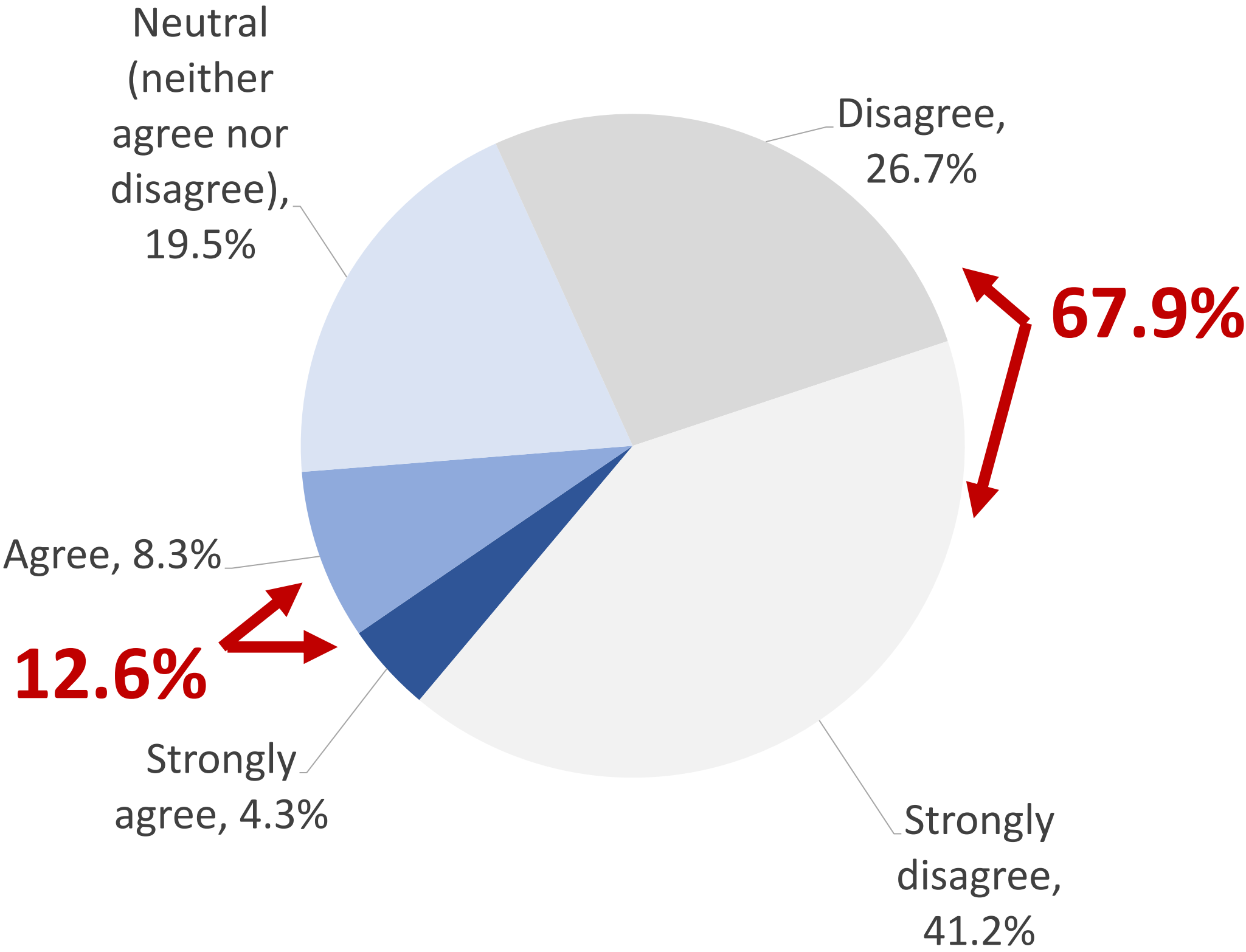
Historical data



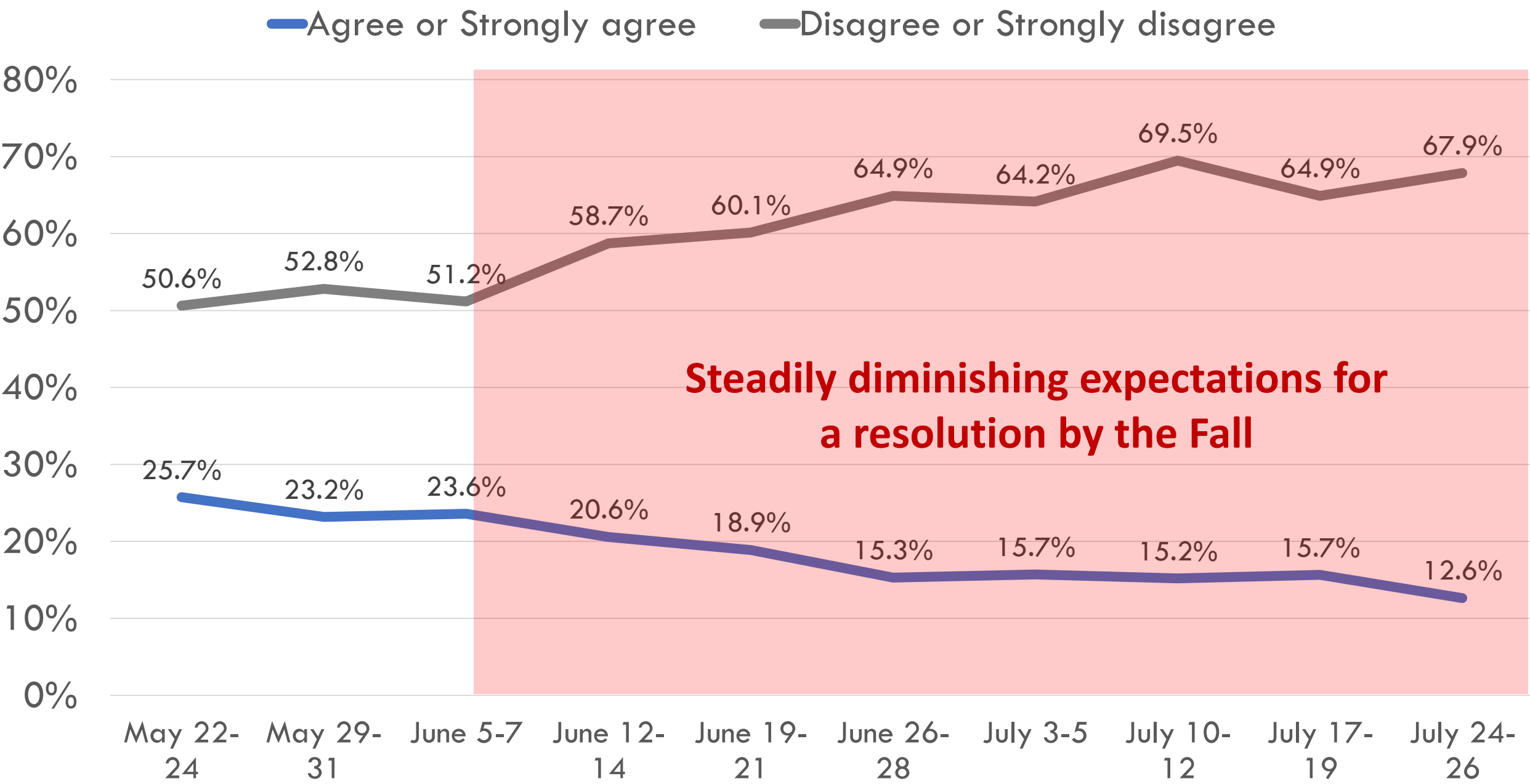
Expectations for Fall Travel Season

How much do you agree with the following statement?

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



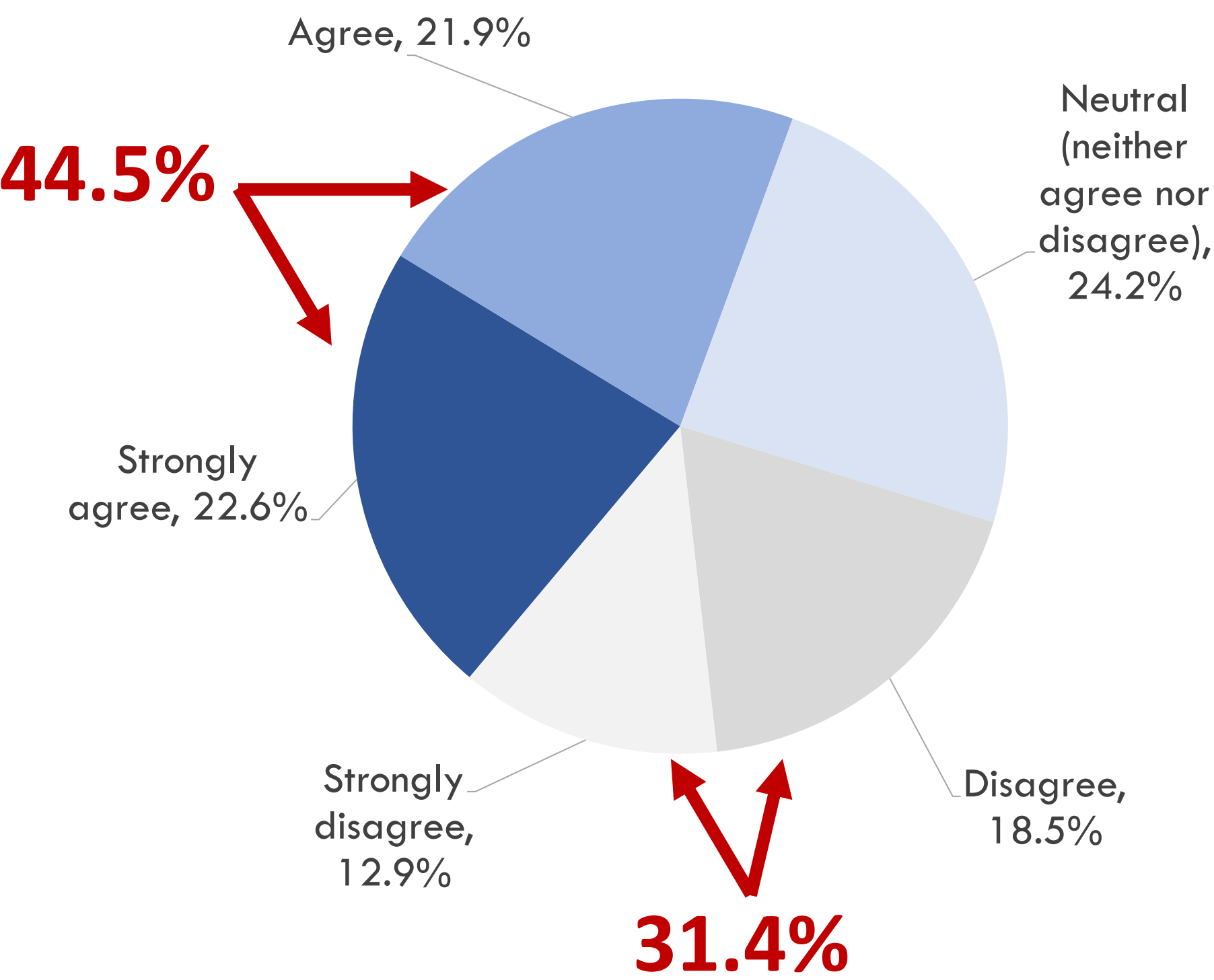
Historical data



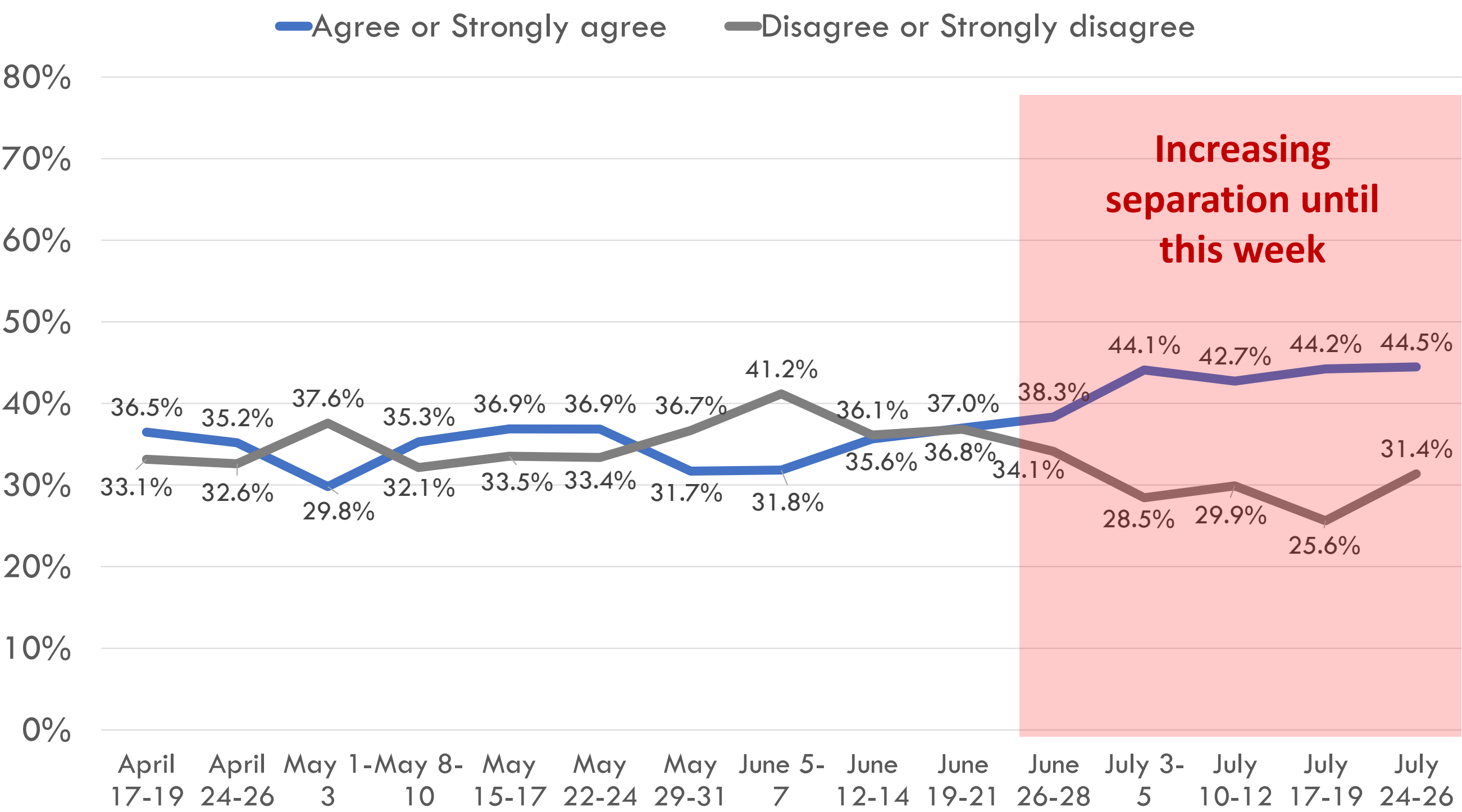
Won't Travel Without Vaccine

How much do you agree with the following statement?

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



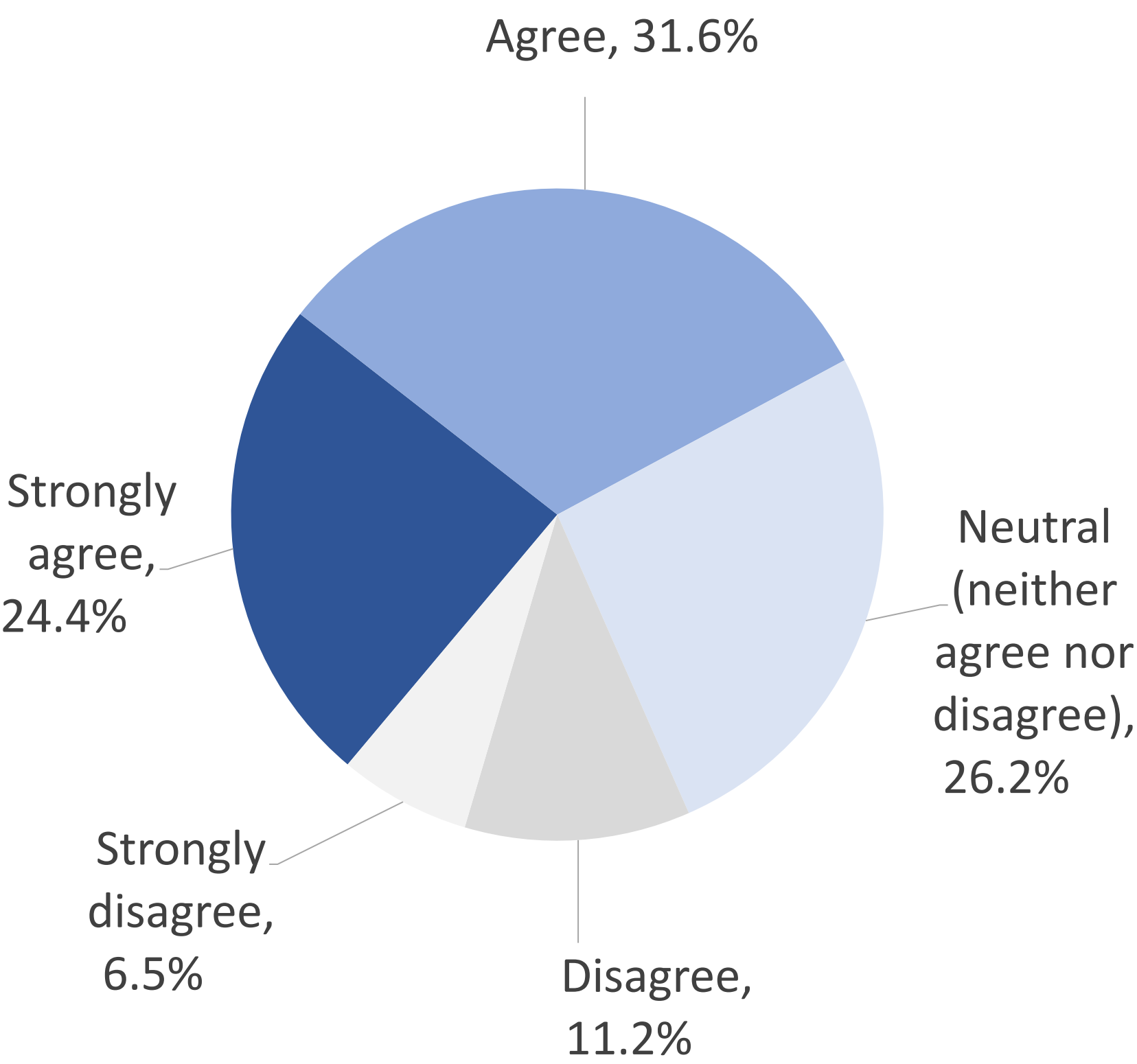
Historical data



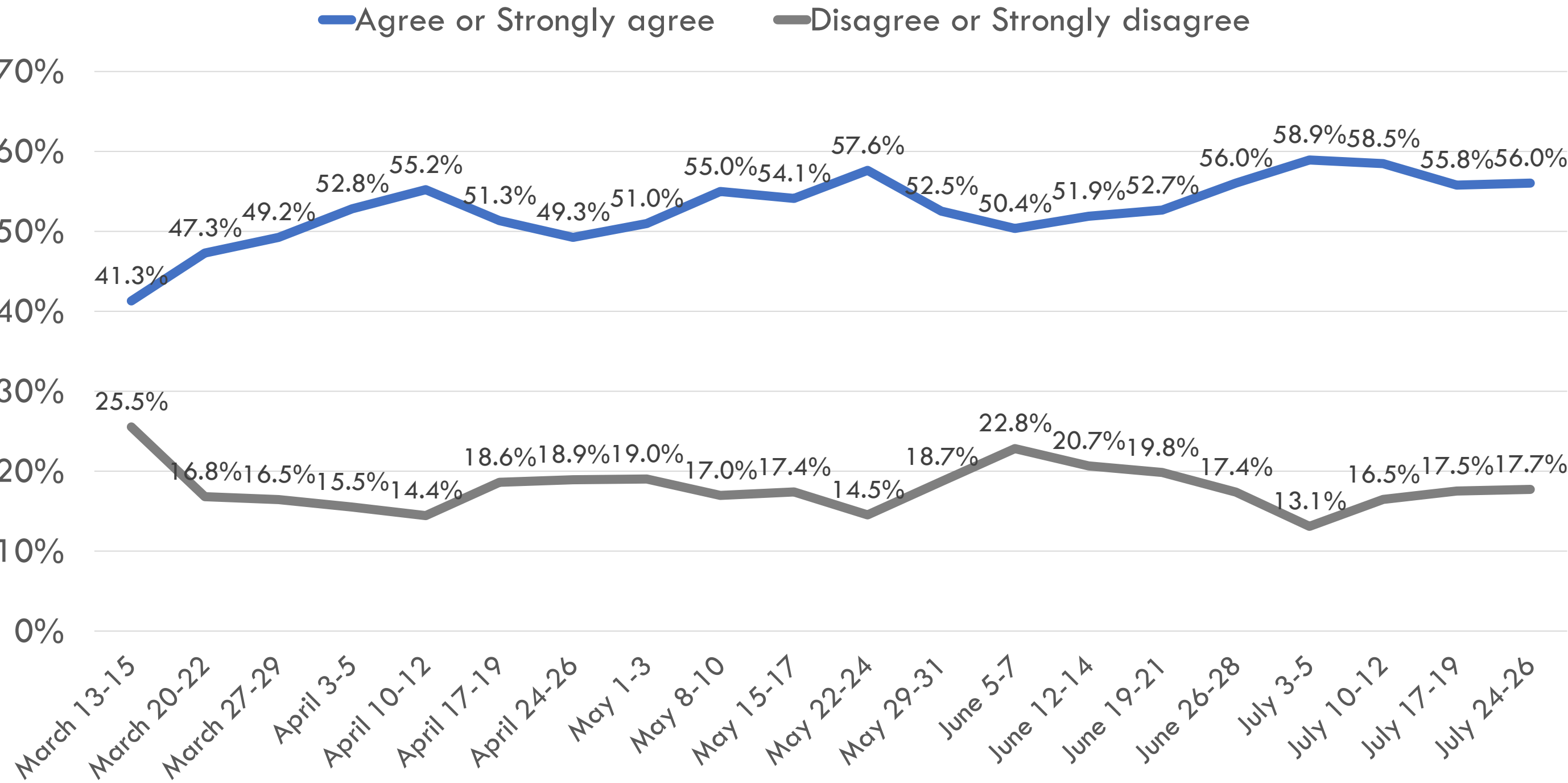
Staycations as a Replacement for Vacations

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).



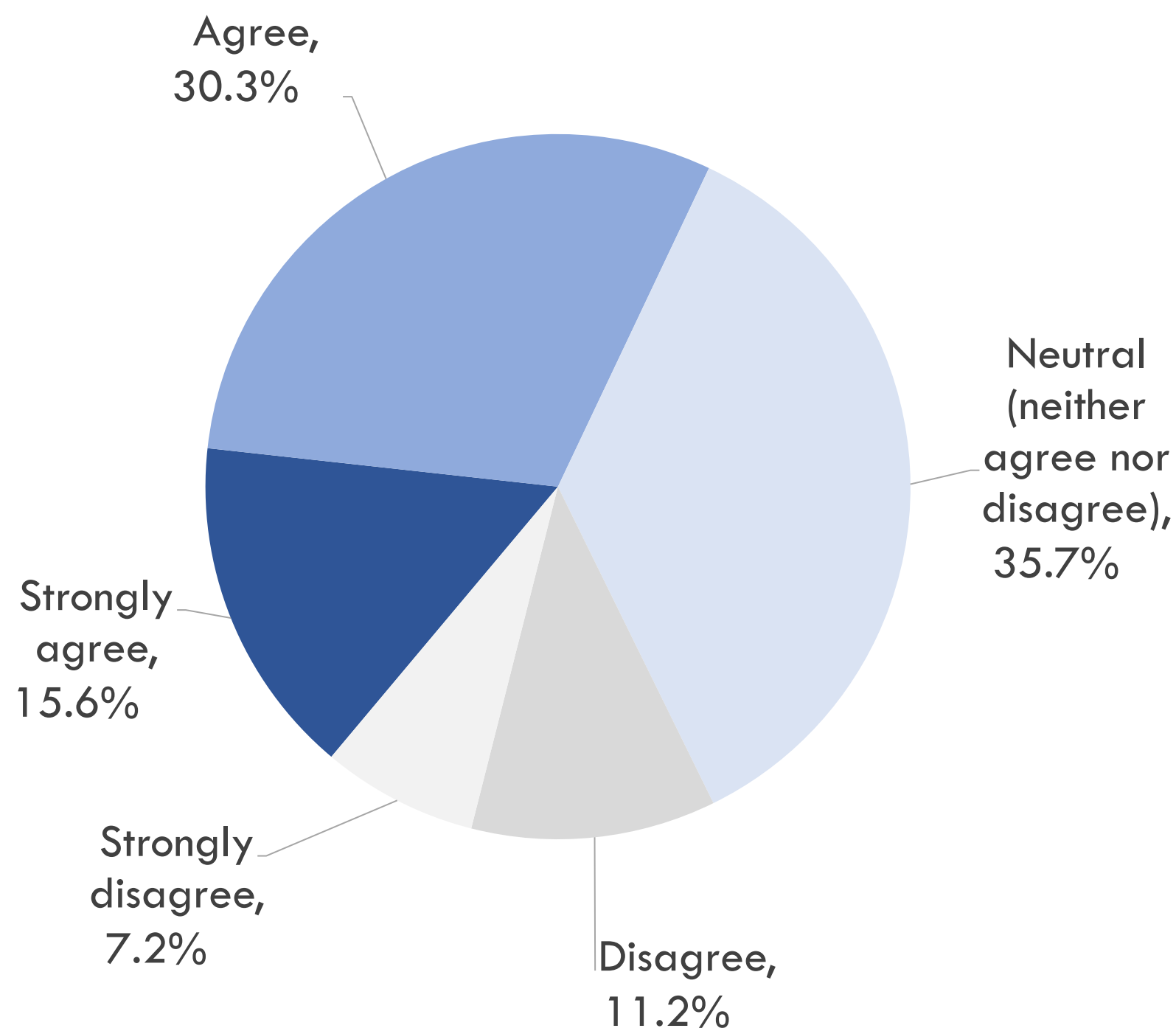
Historical data



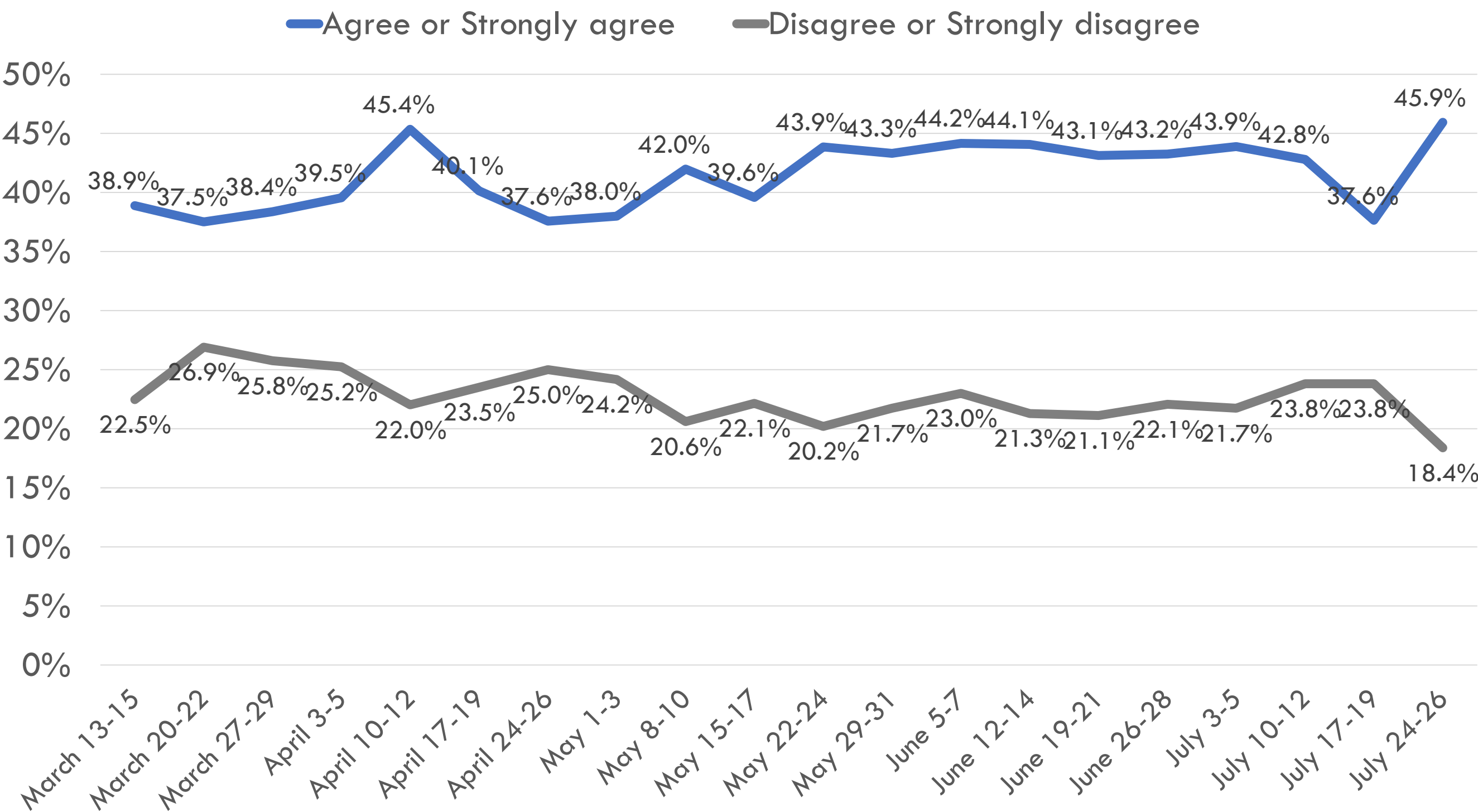
Replacing Air Travel With Road Trips

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.



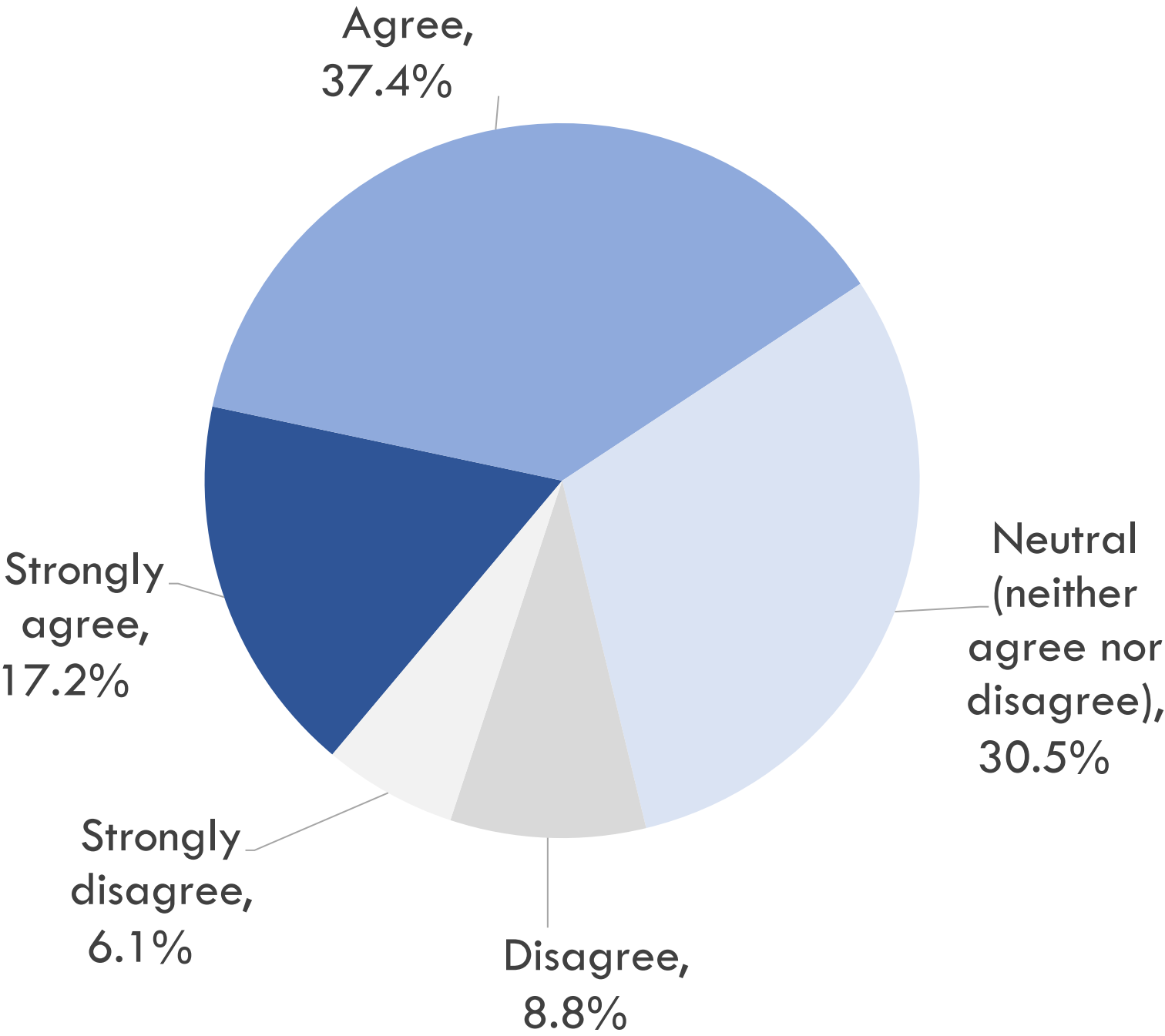
Historical data



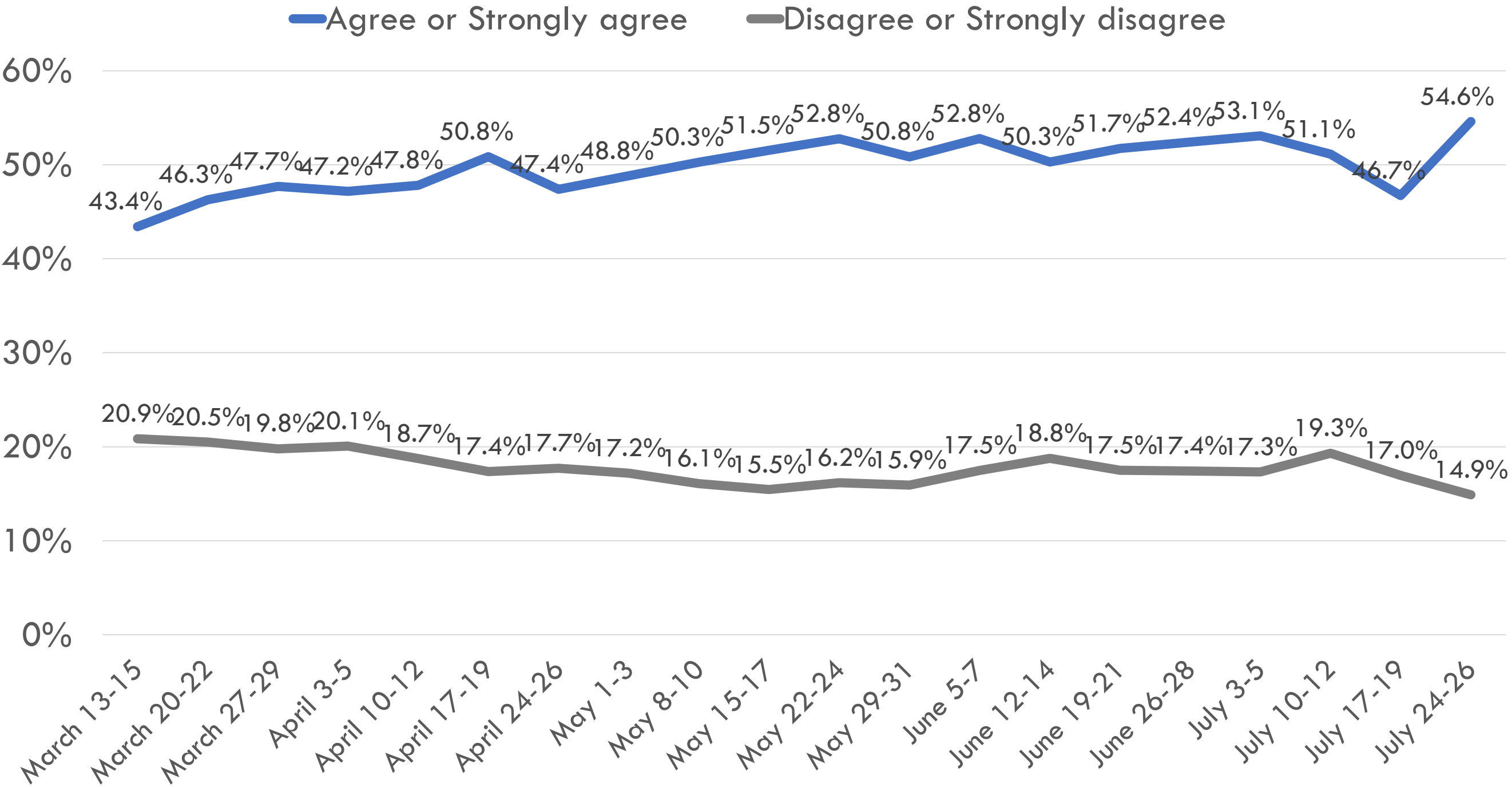
Replacing Long-Haul Travel with Regional Trips

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).



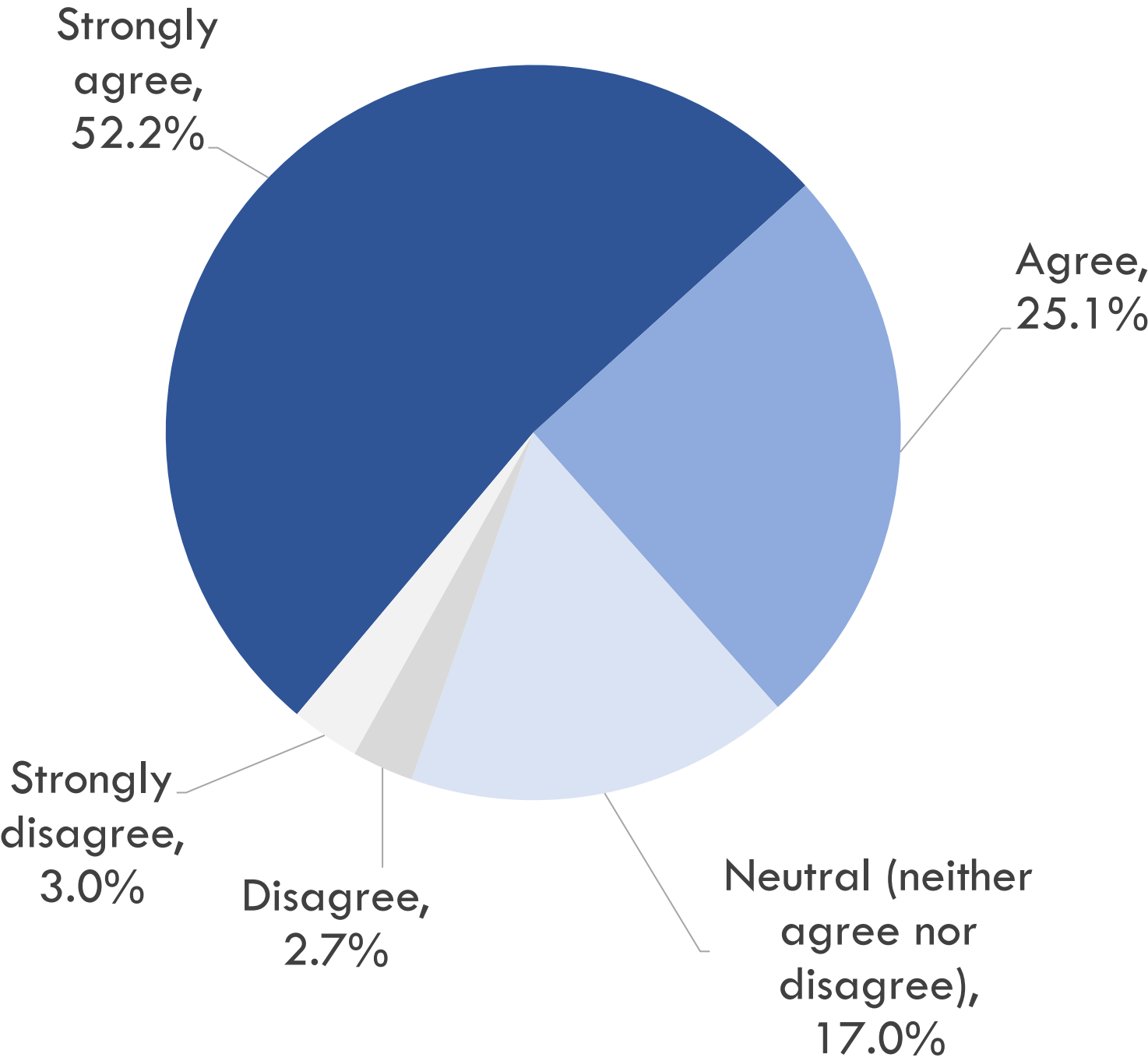
Historical data



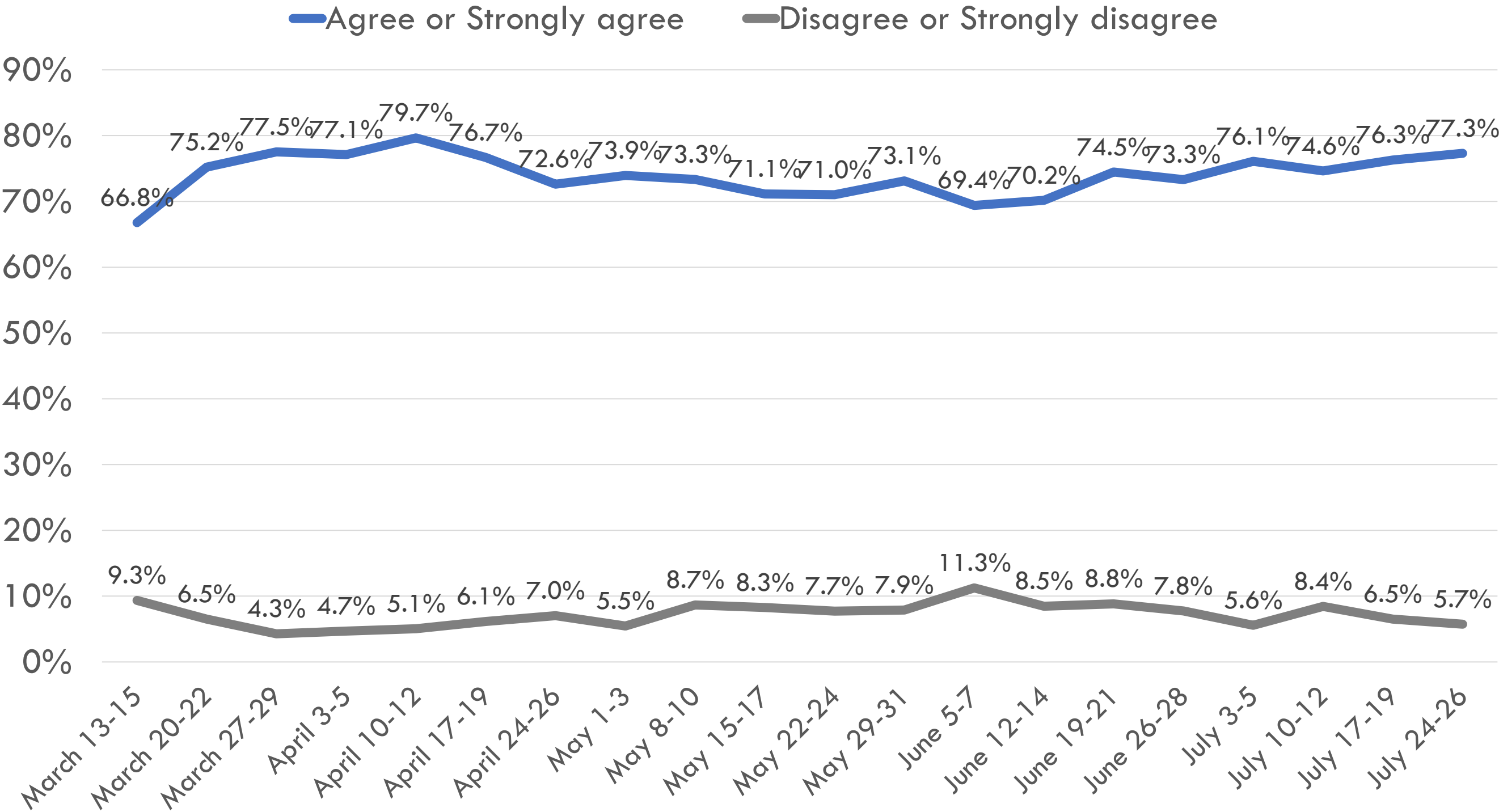
Avoiding Conventions & Conferences

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.



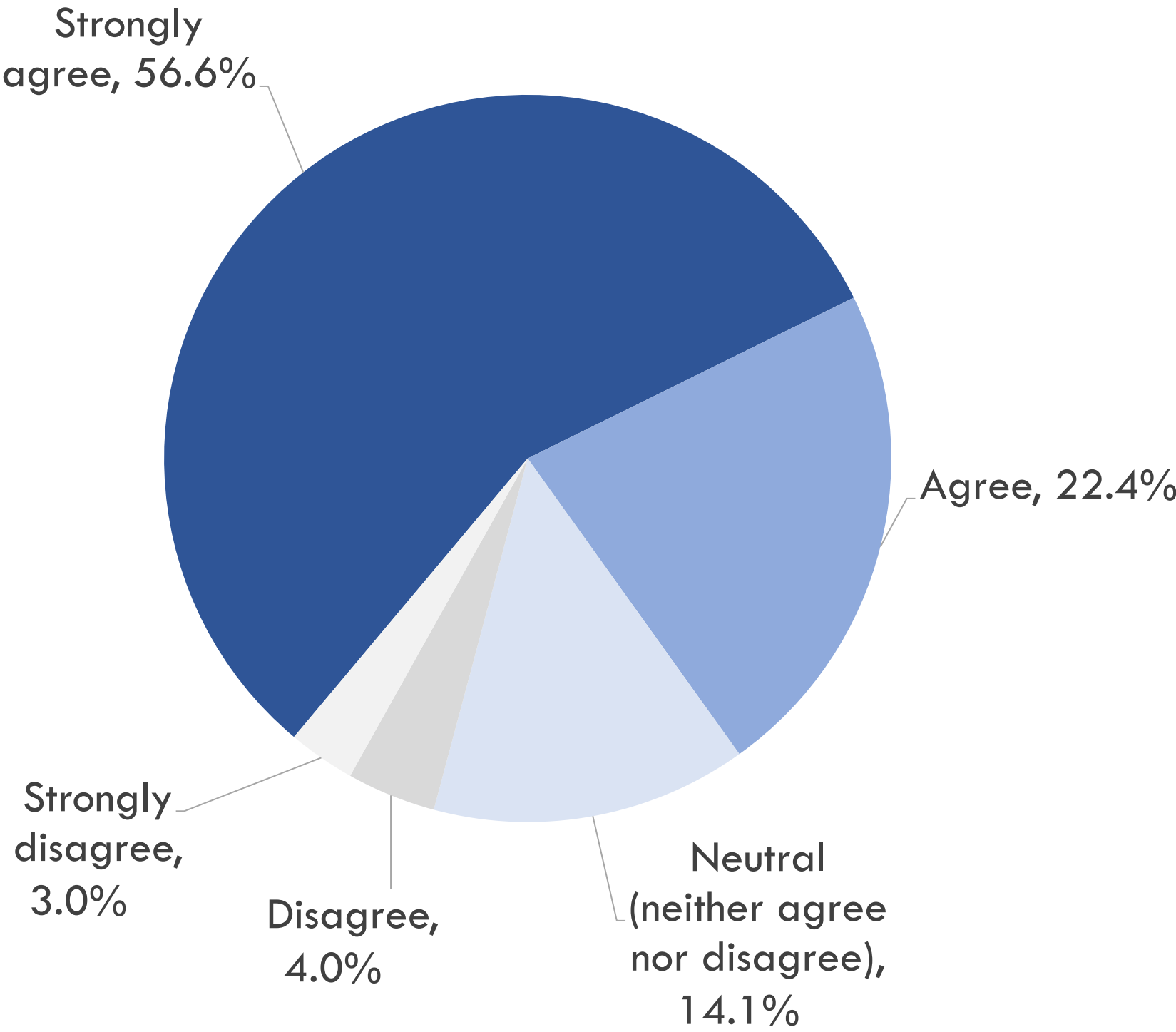
Historical data



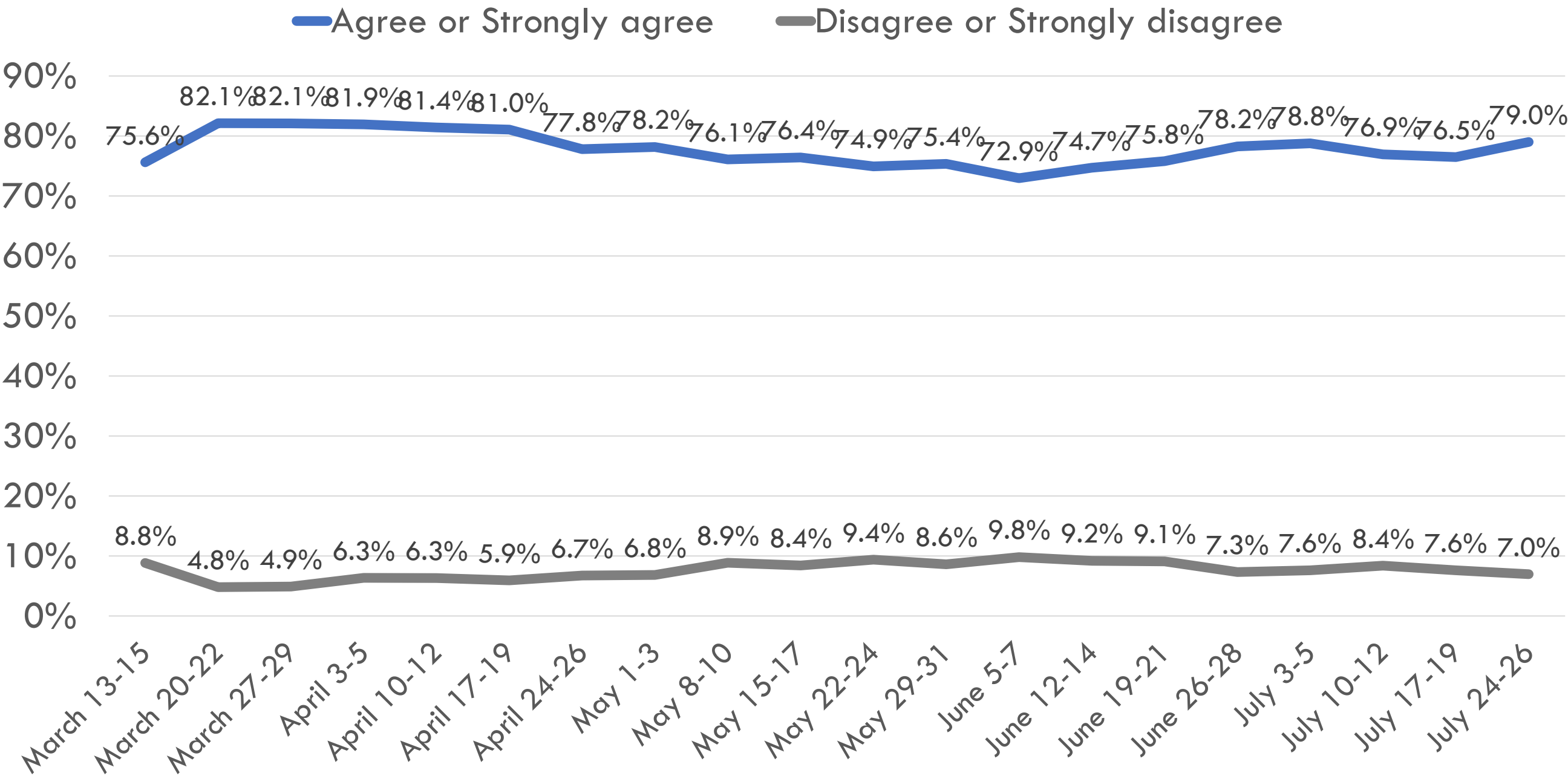
Avoiding International Travel

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.



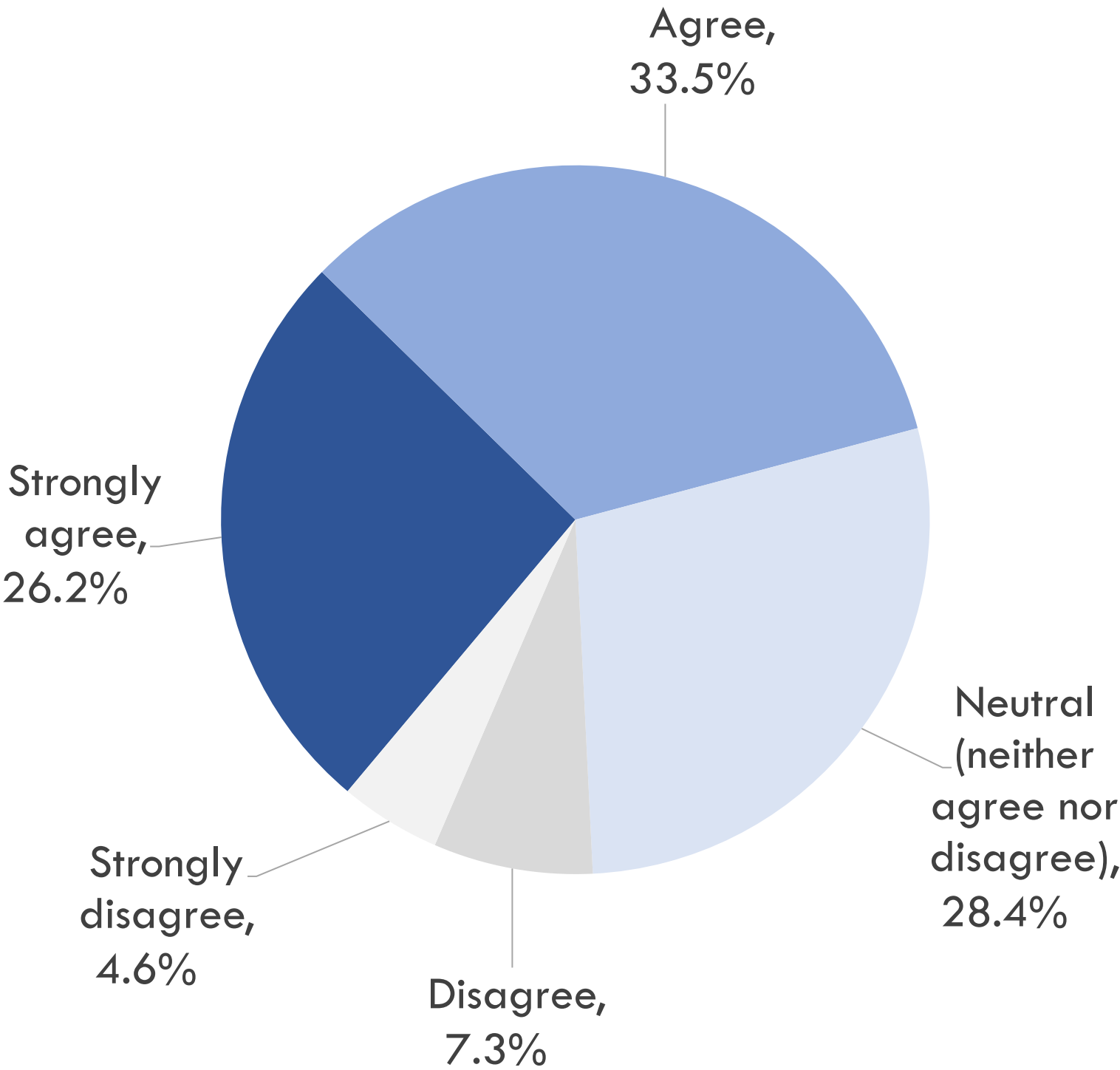
Historical data



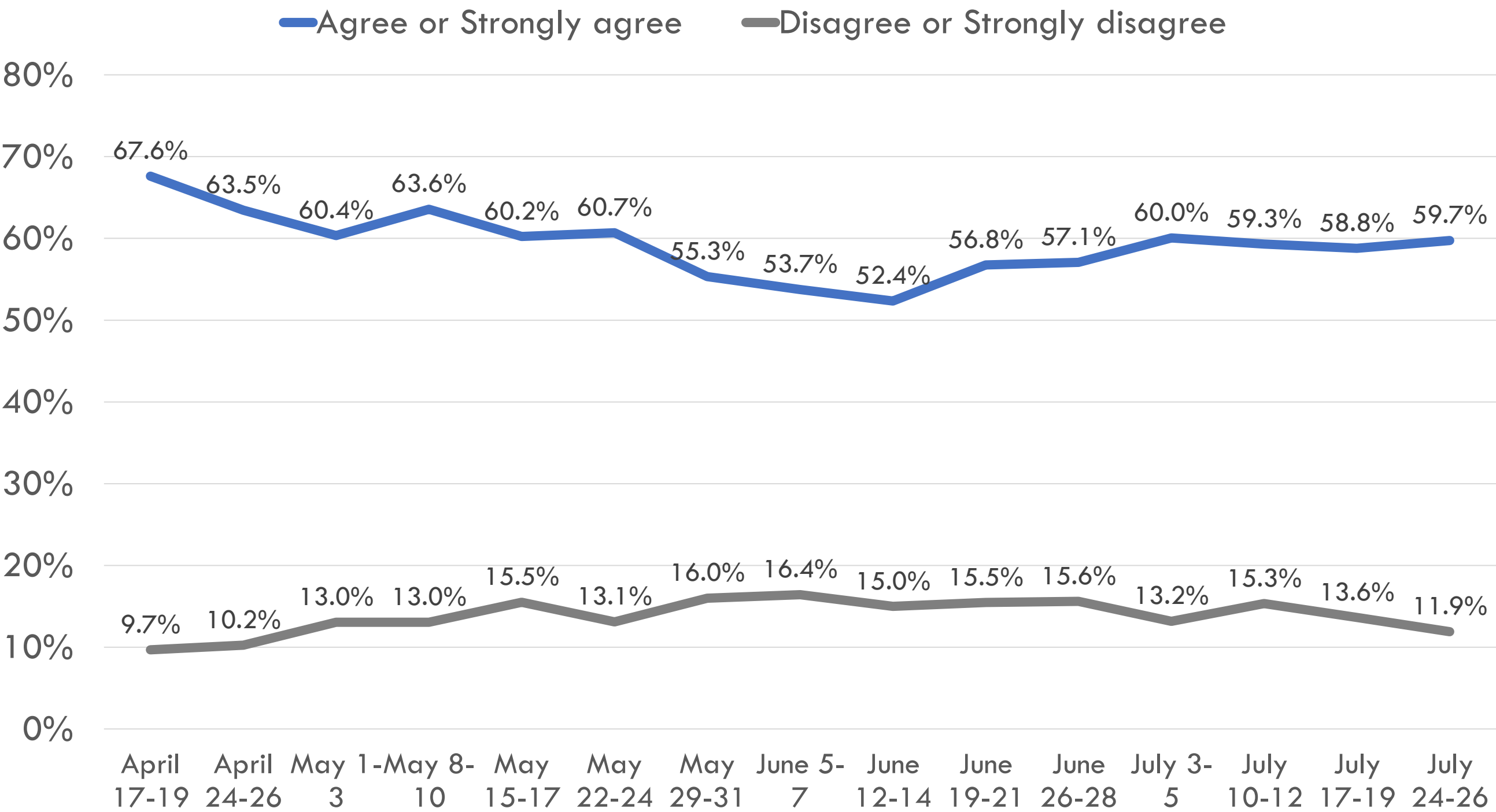
Travelers in Community are Unwanted

How much do you agree with the following statement?

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



Historical data



Next Month

Better

Worse

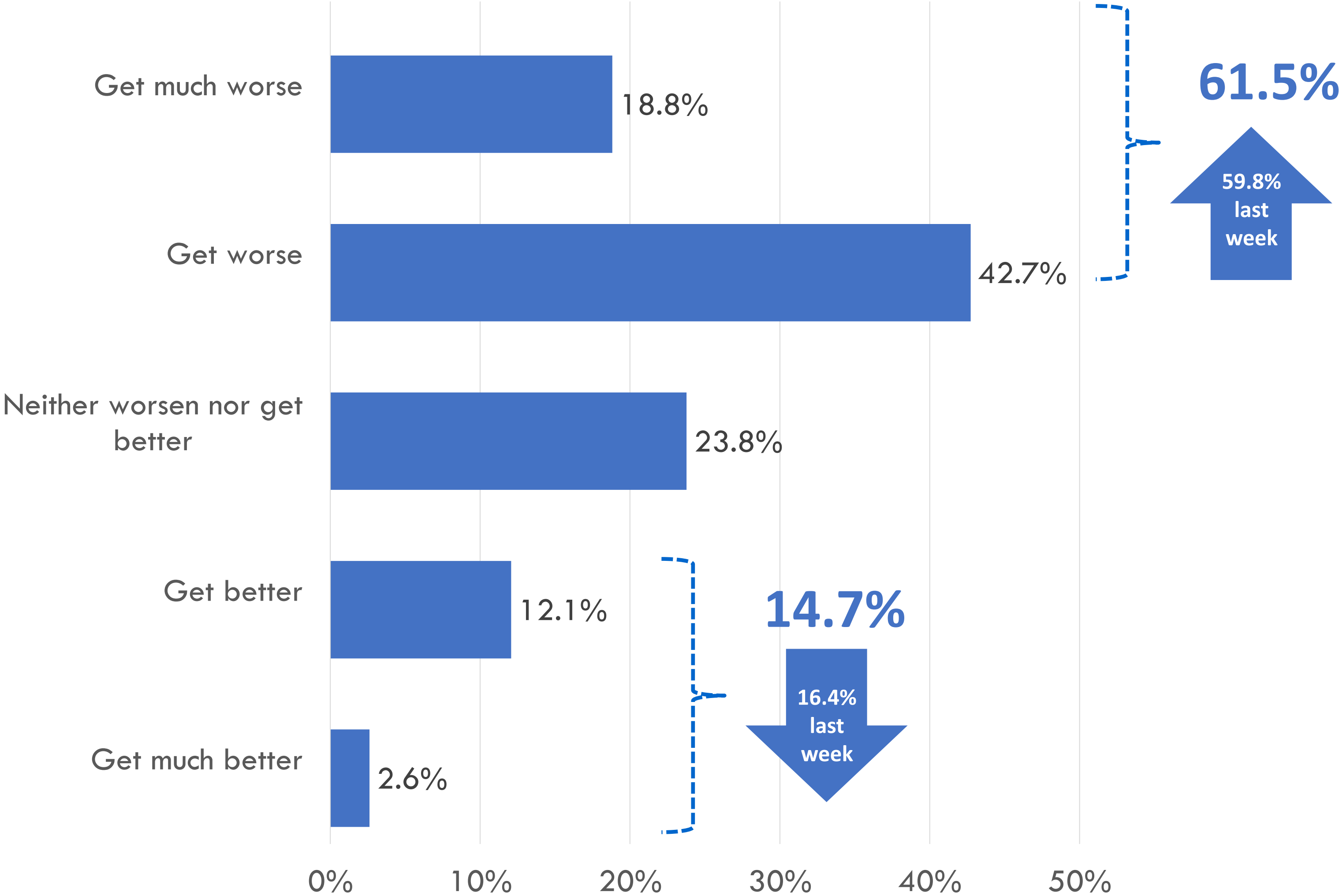


Expectations for the Coronavirus Outbreak

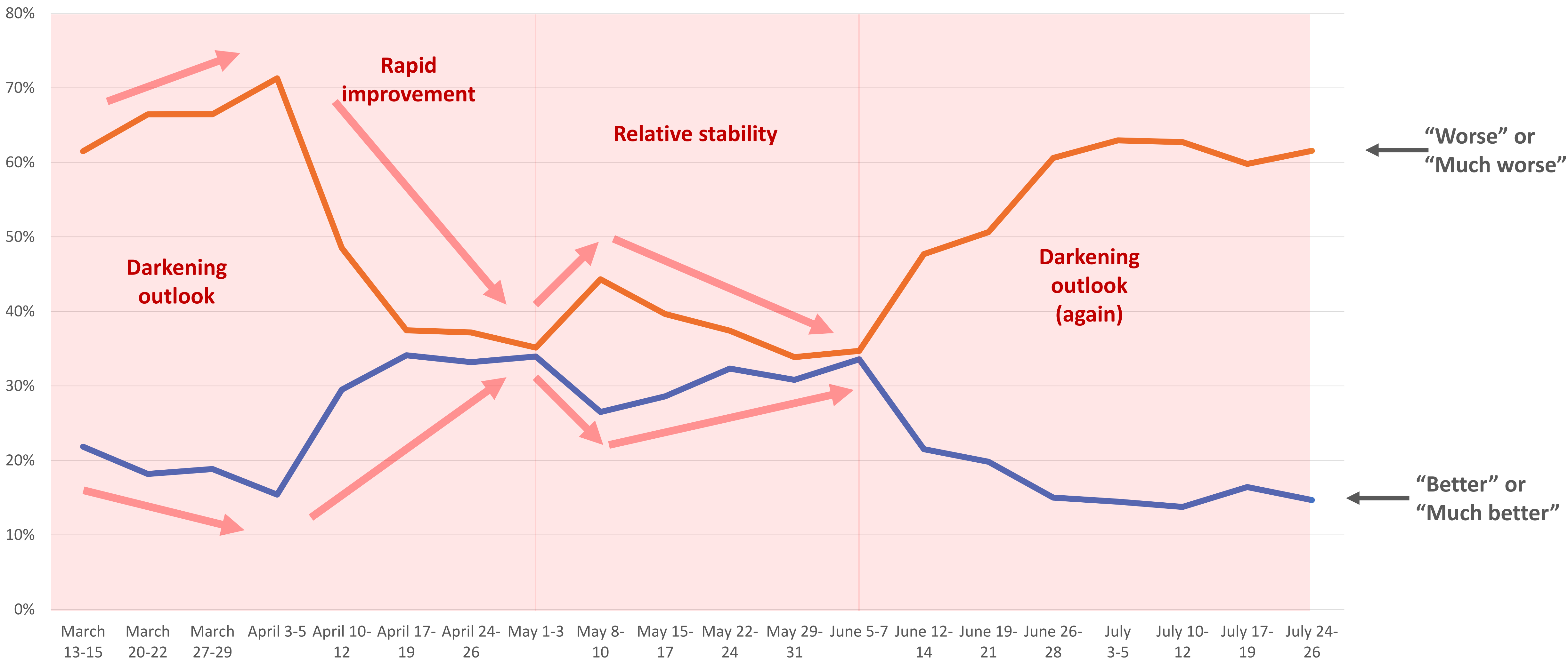
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

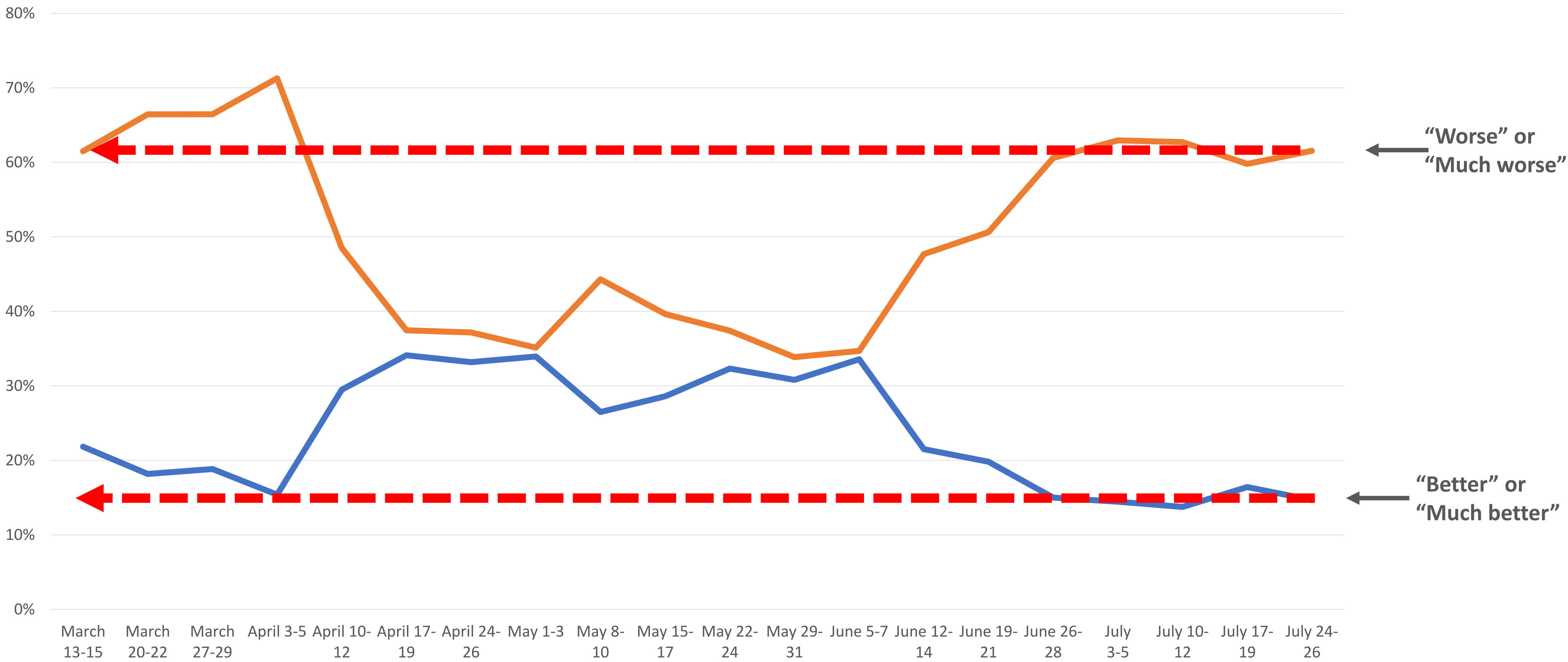
(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)



Expectations for the Coronavirus Outbreak



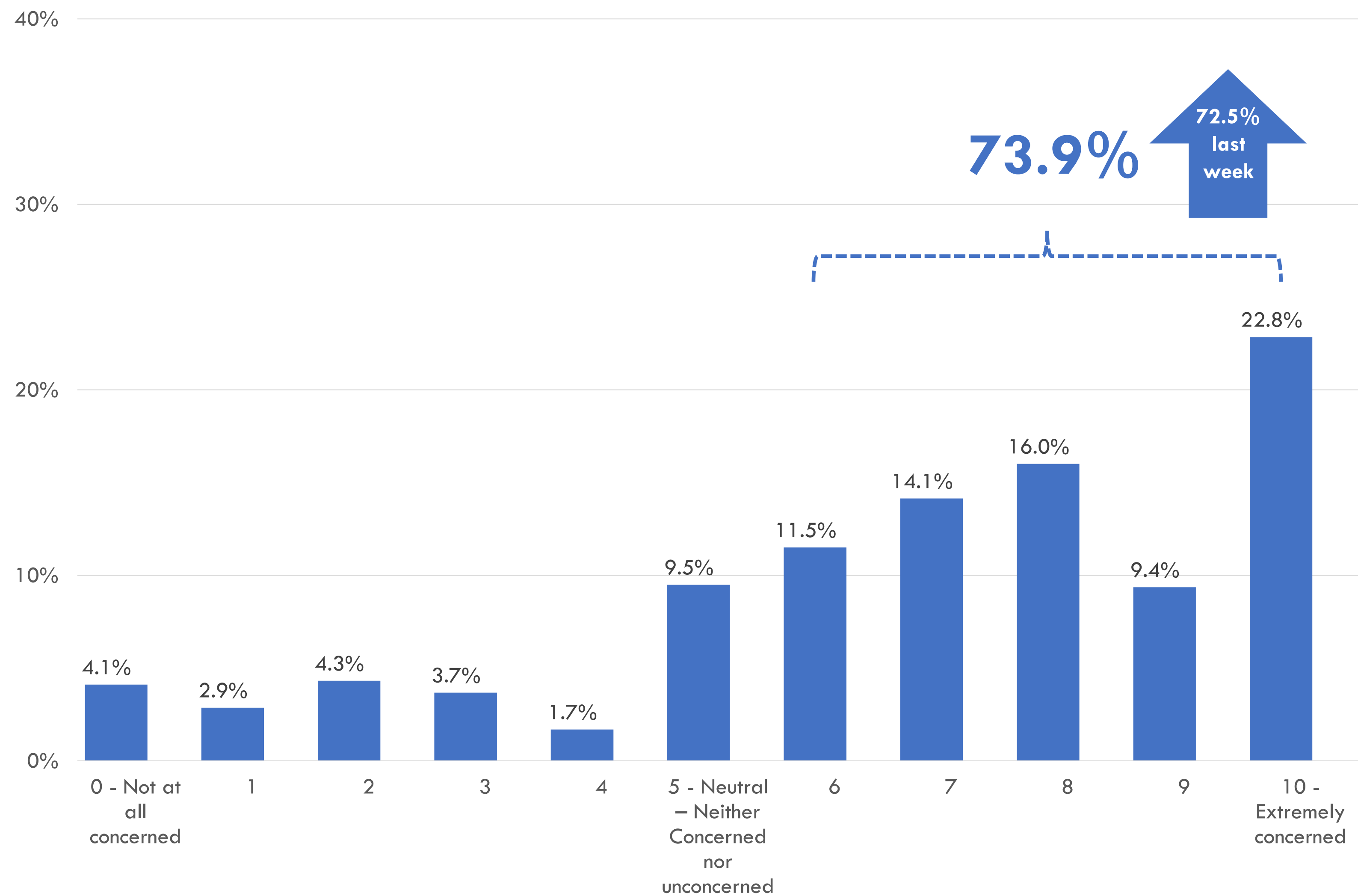
Expectations for the Coronavirus Outbreak



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)

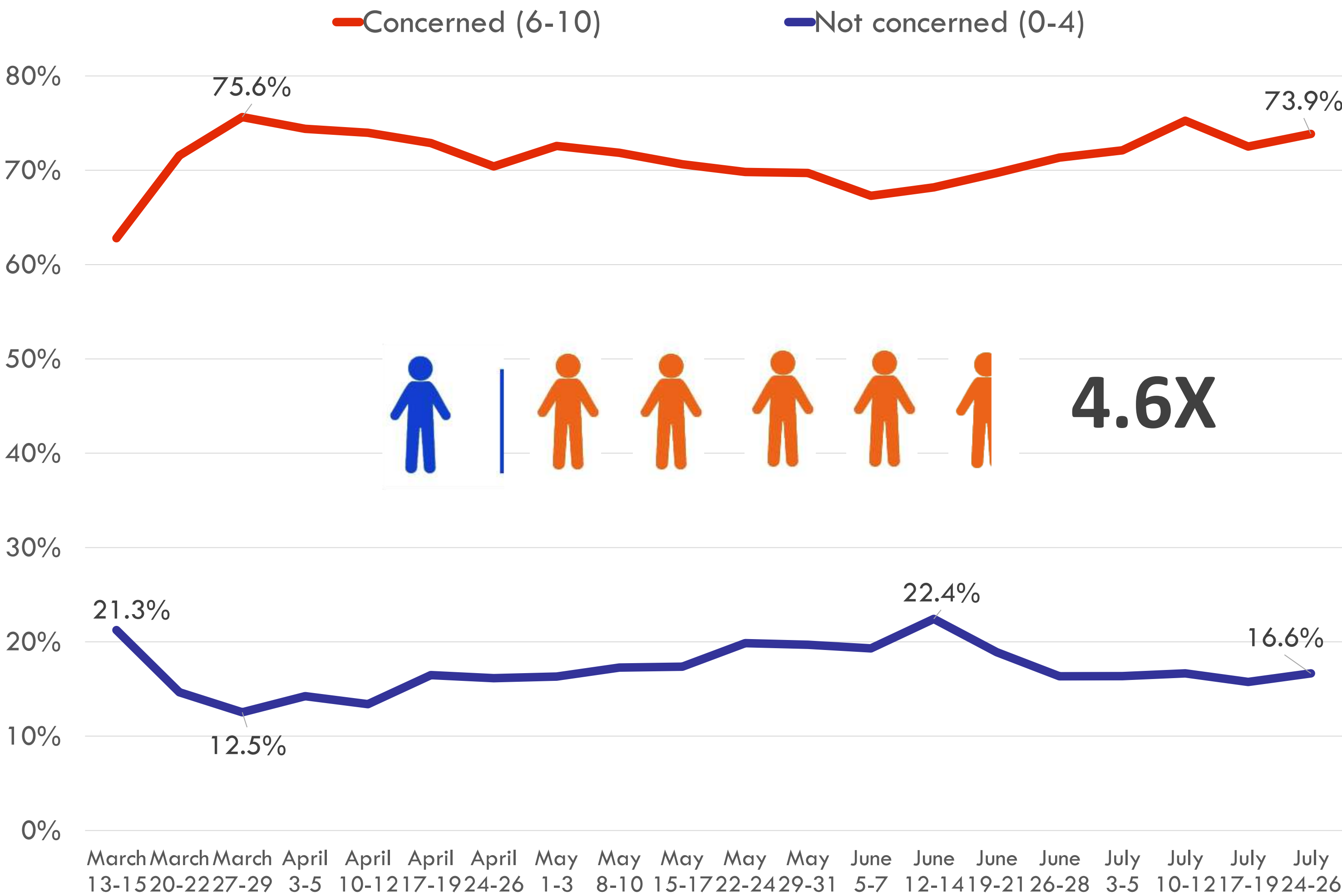
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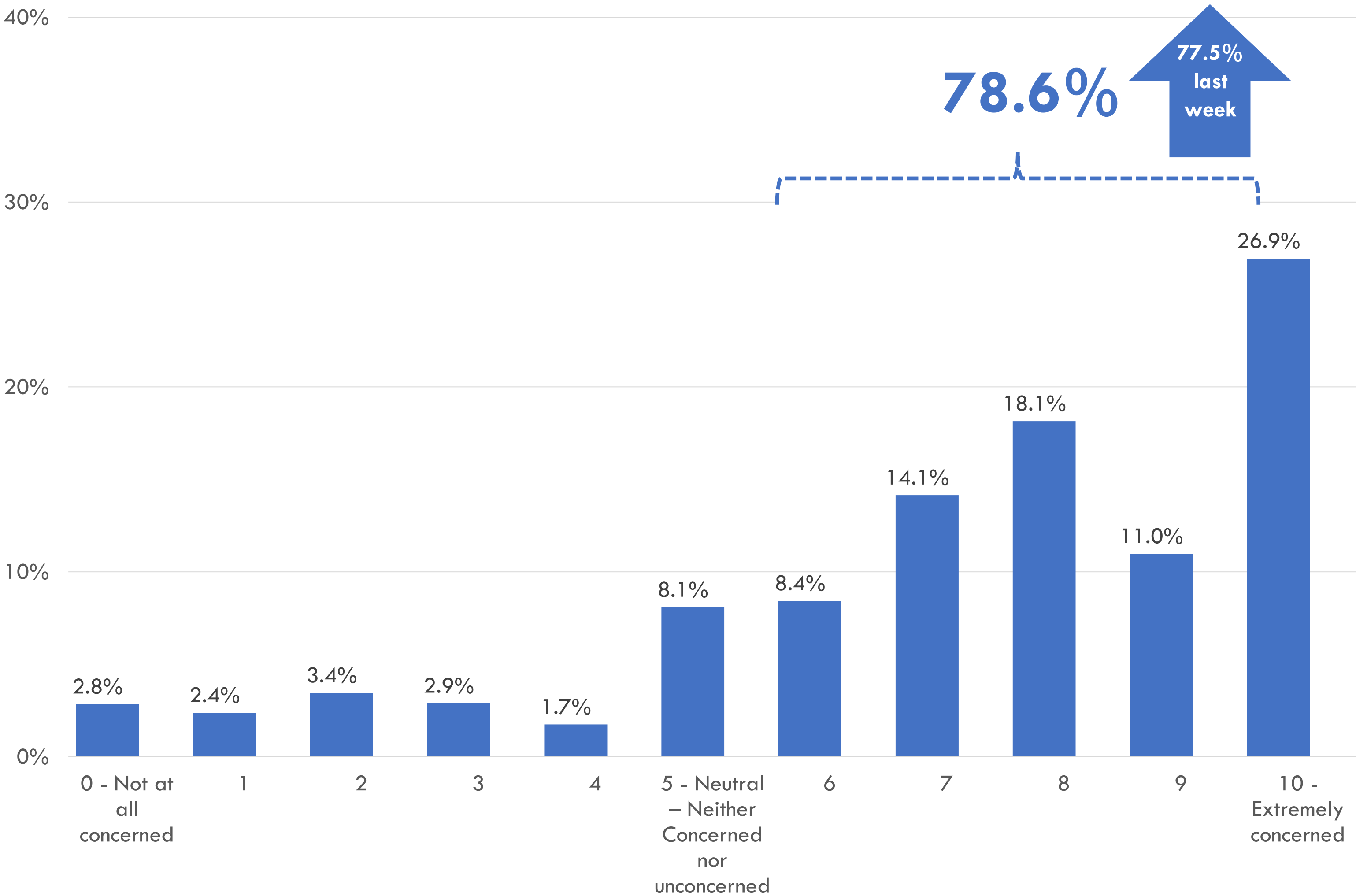
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



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)

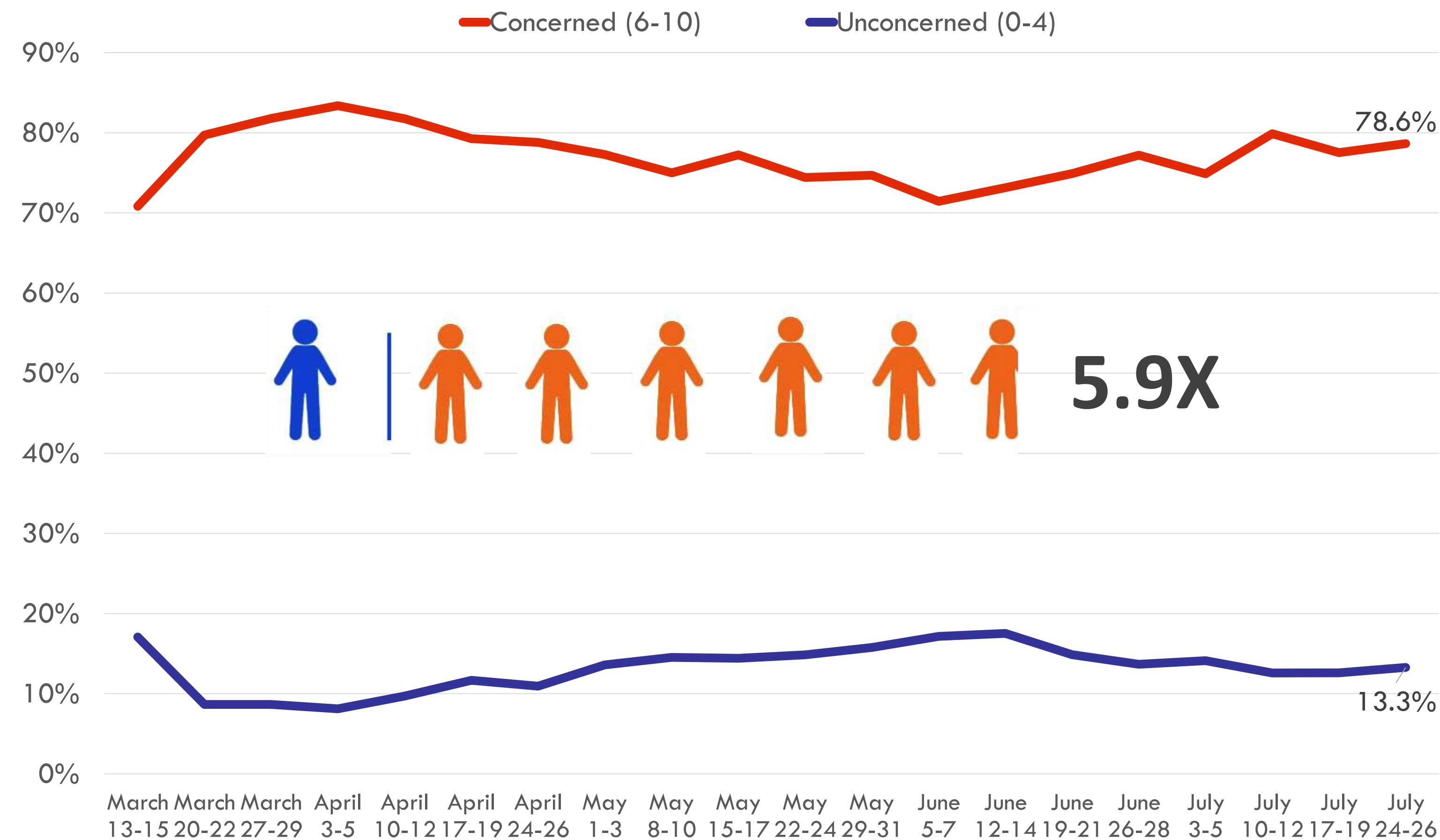
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



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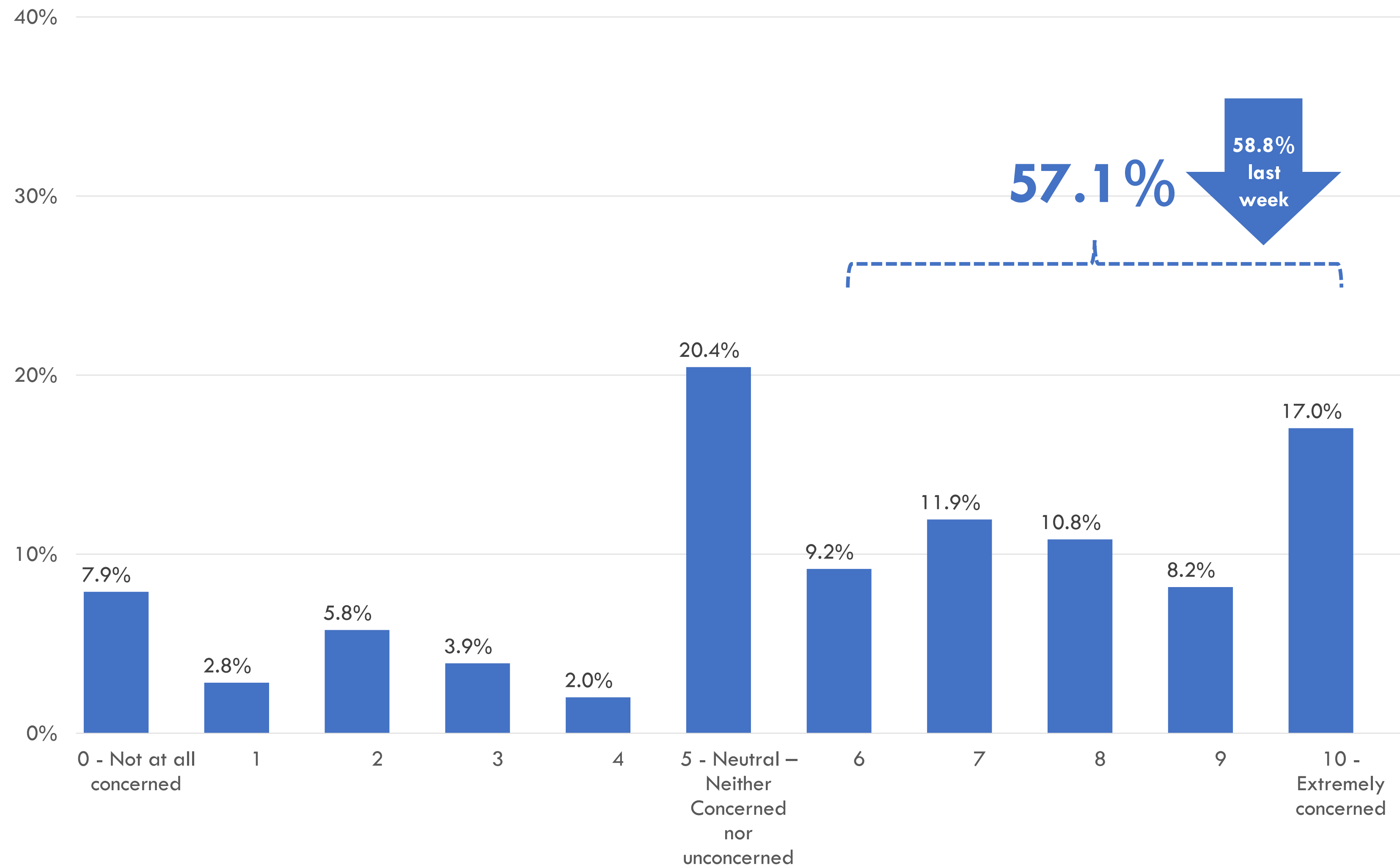


Concerns About Personal Finances

58.8%, down from 59.9%, last week

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)

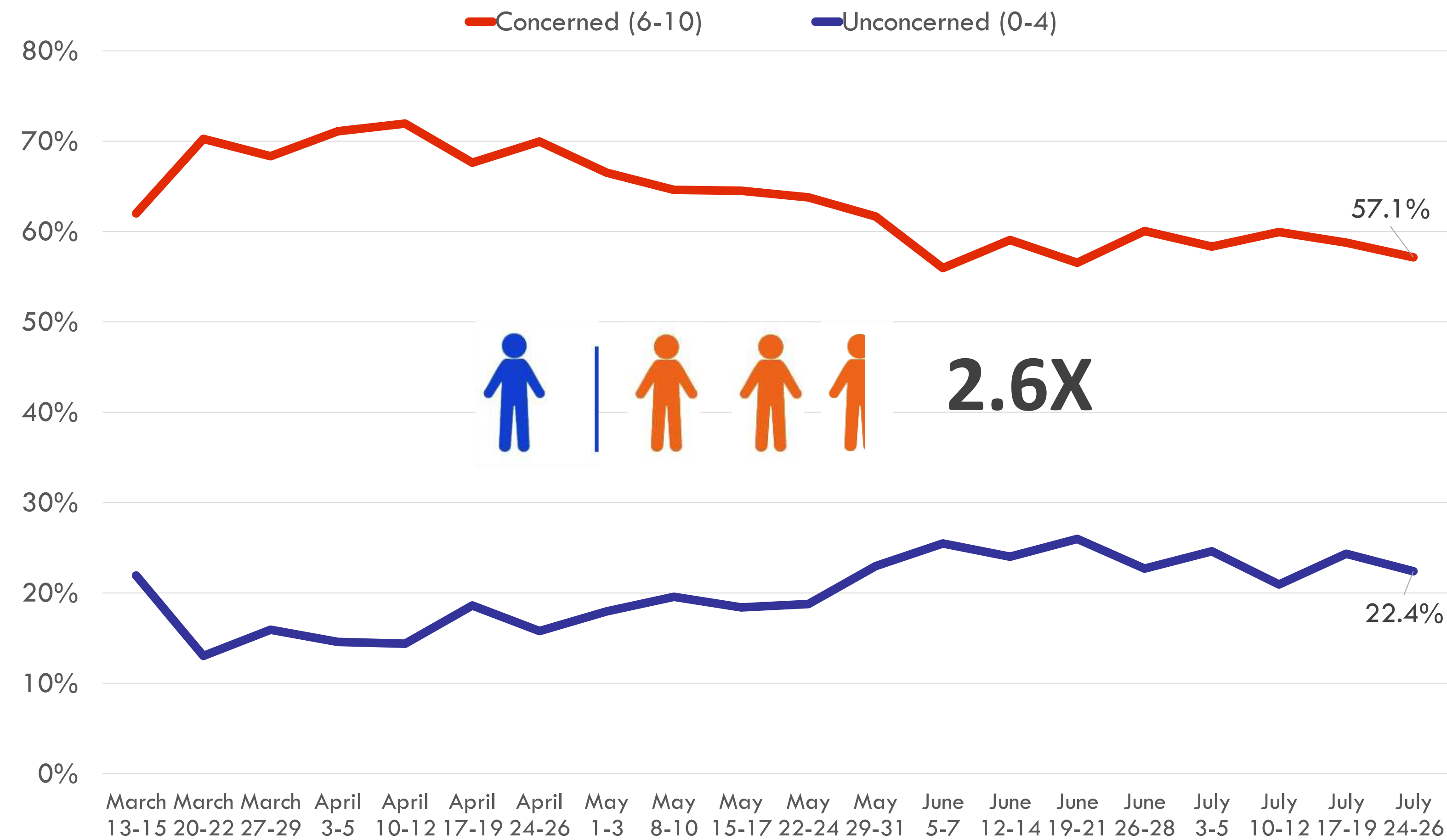
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Concerns About Personal Finances

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

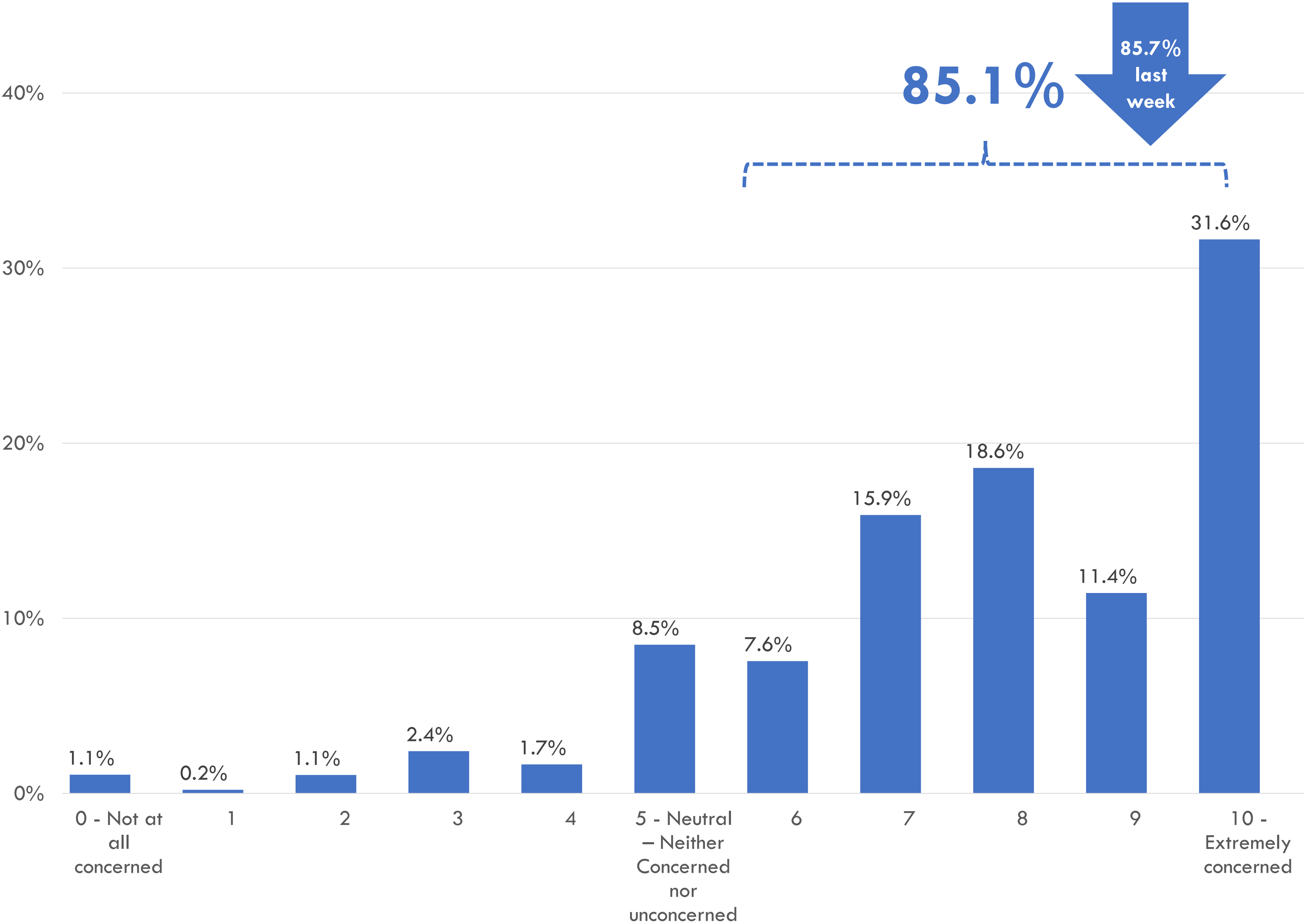
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



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?

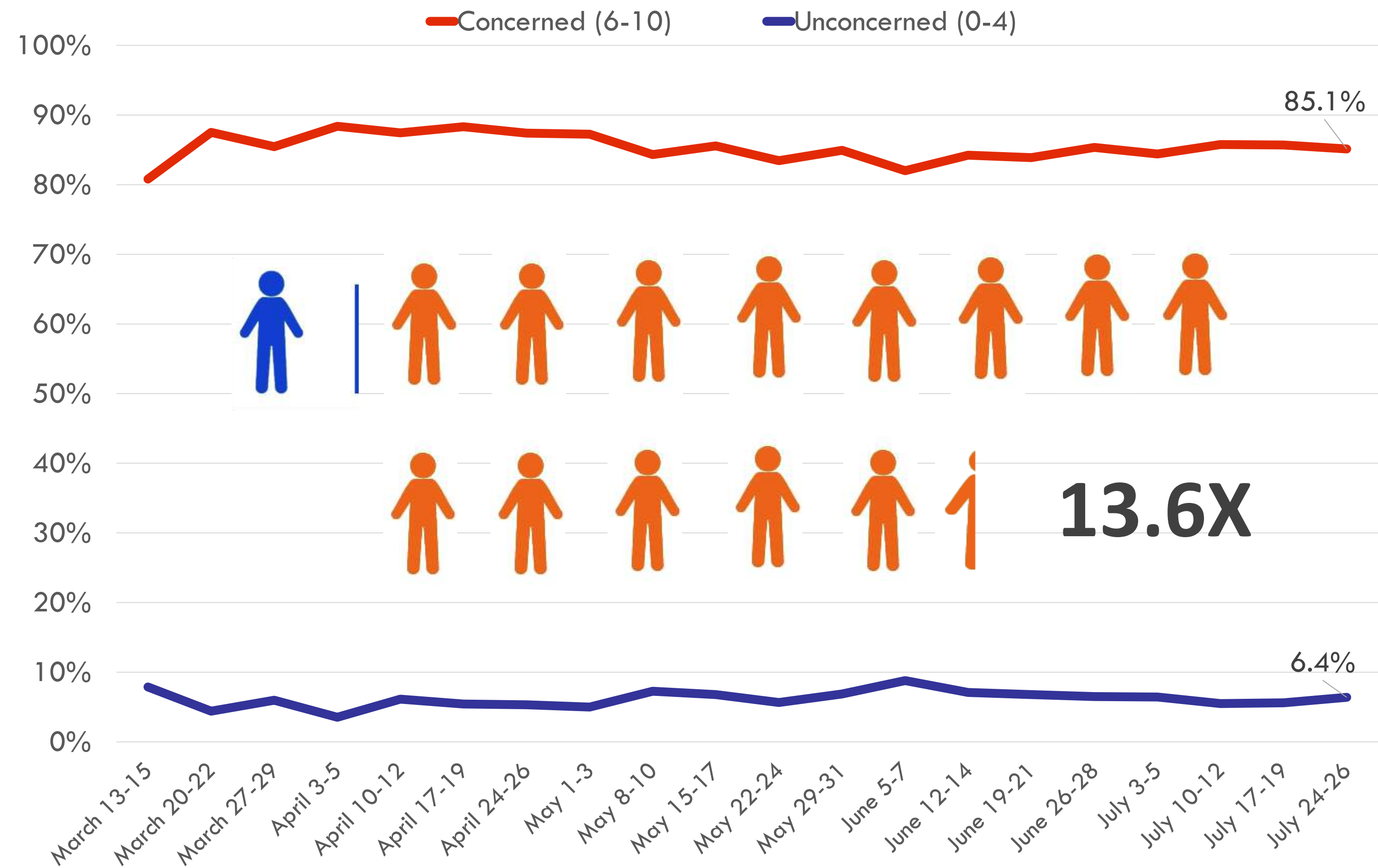
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



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?

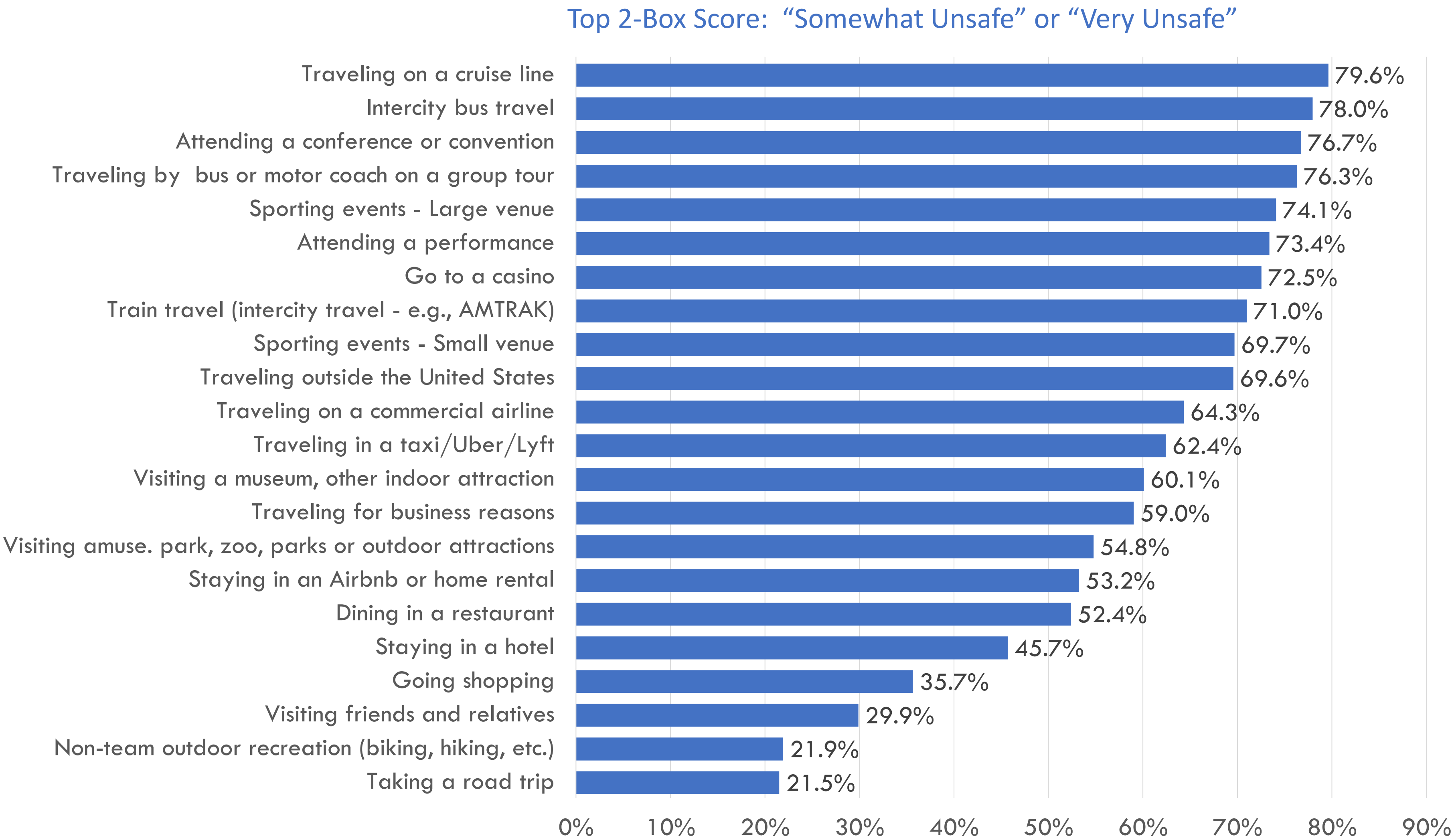
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Perceived Safety of Travel Activities (Wave 20)

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

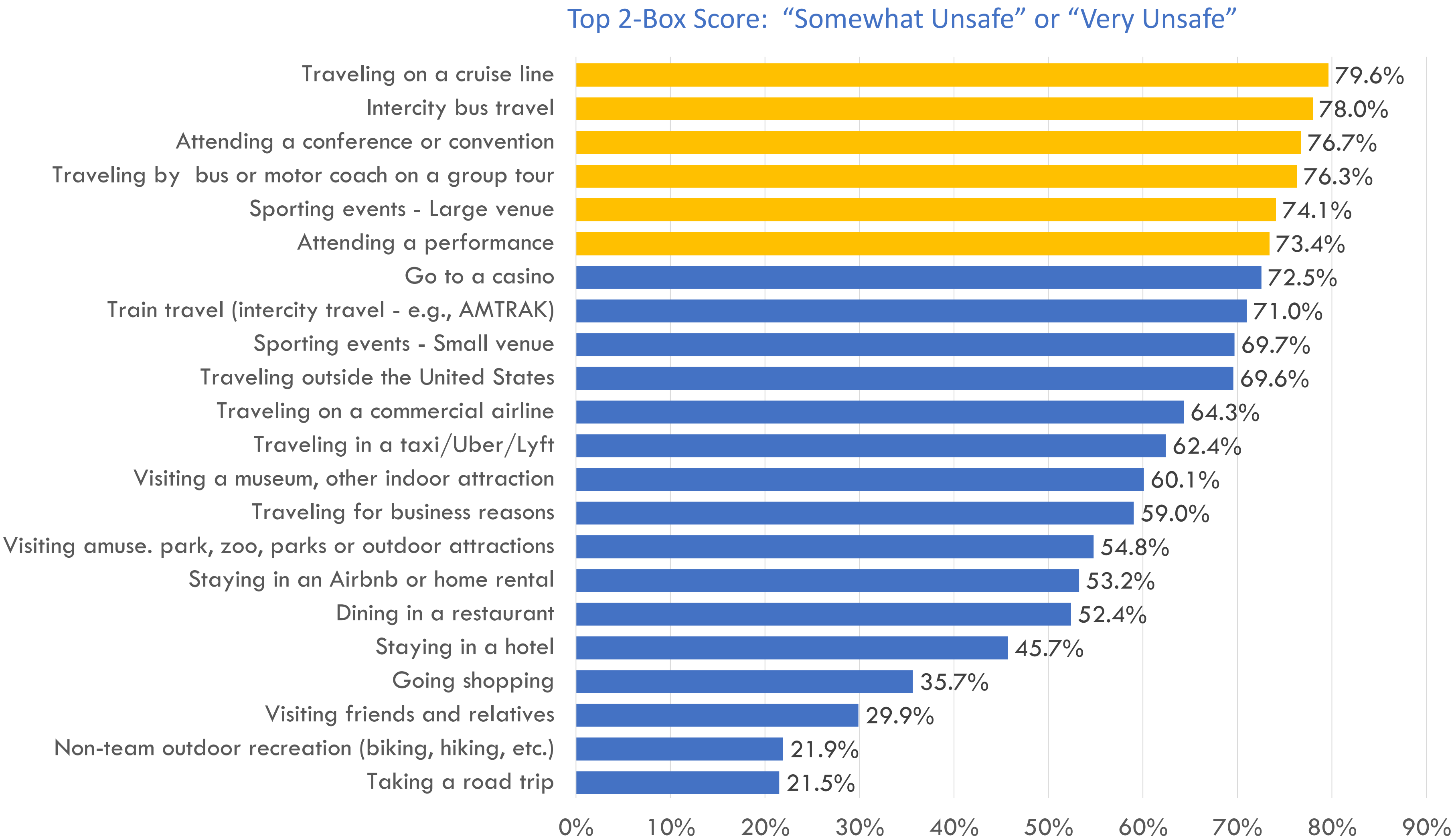
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



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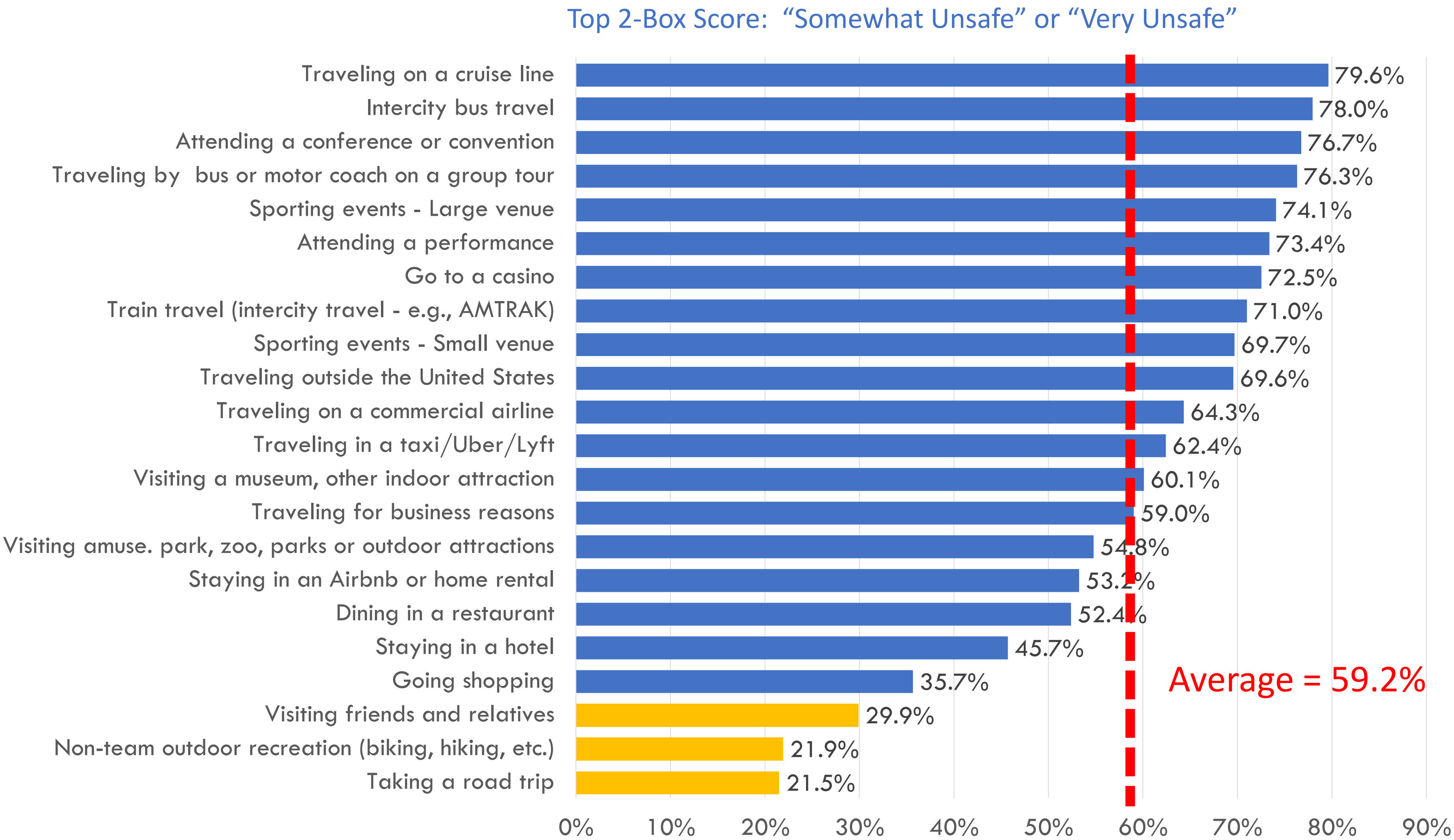
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Perceived Safety of Travel Activities (Wave 20)

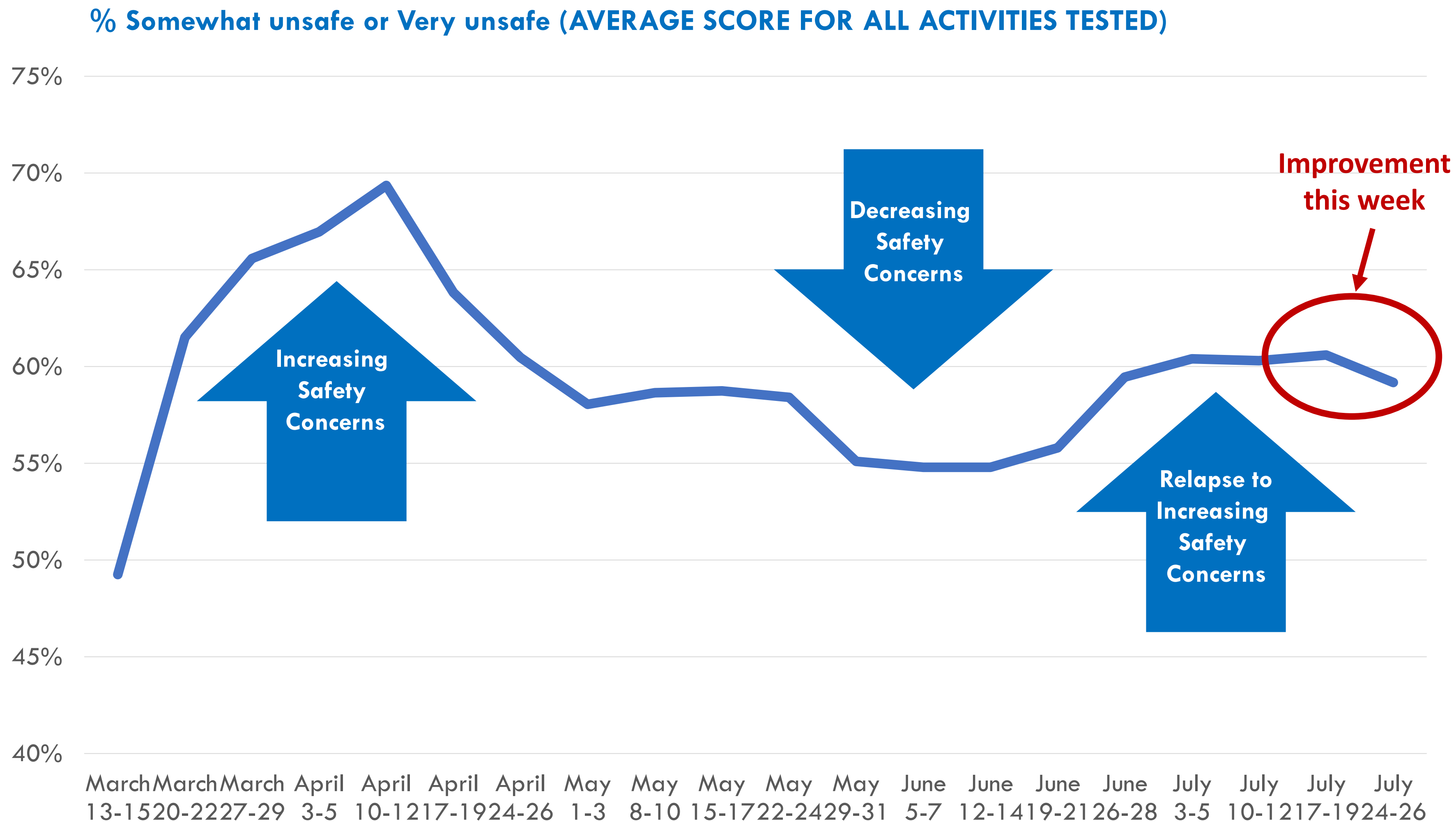
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Perceived Safety of Travel Activities (Waves 1-20 Comparison)

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



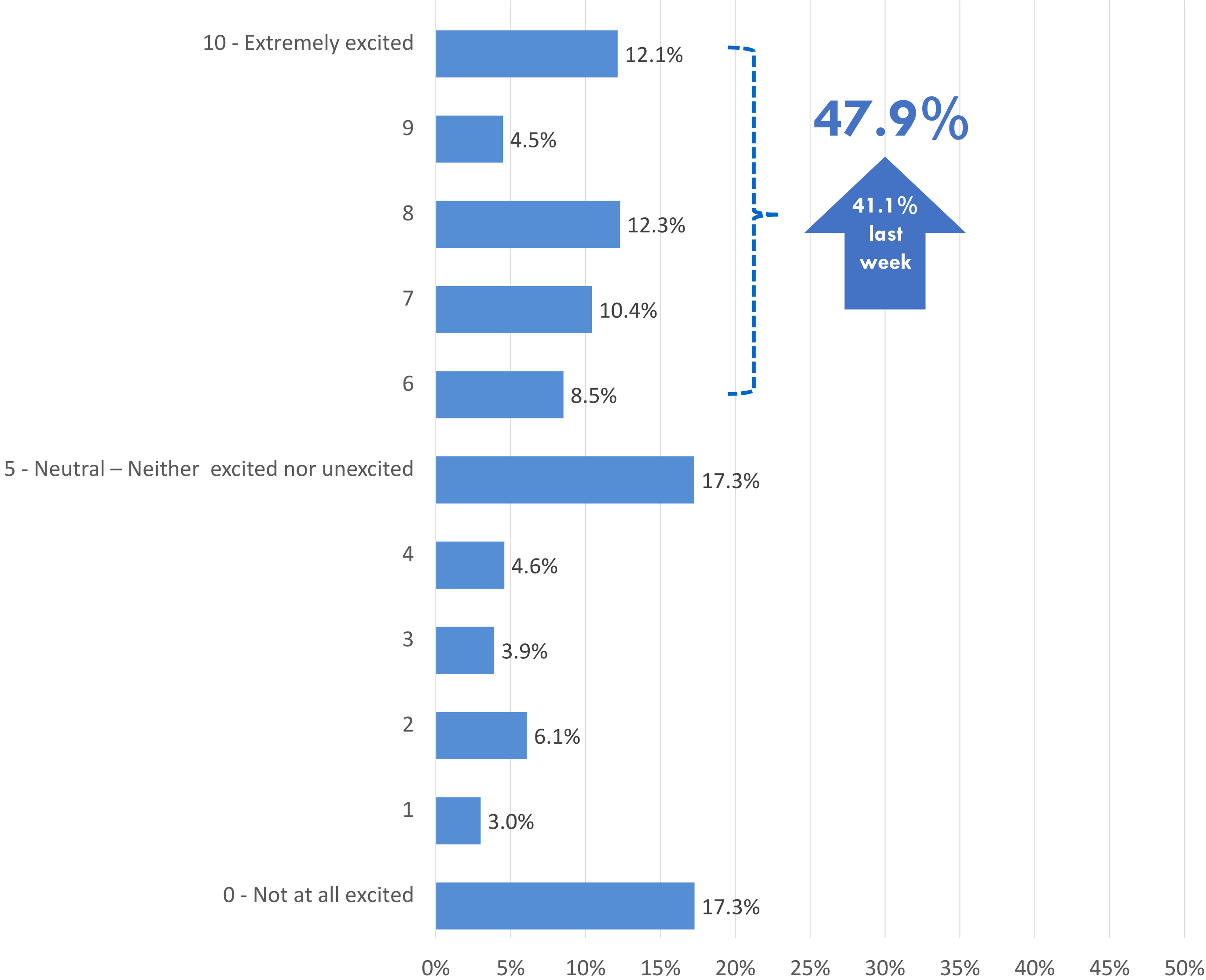
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

Excitement to Travel Now

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

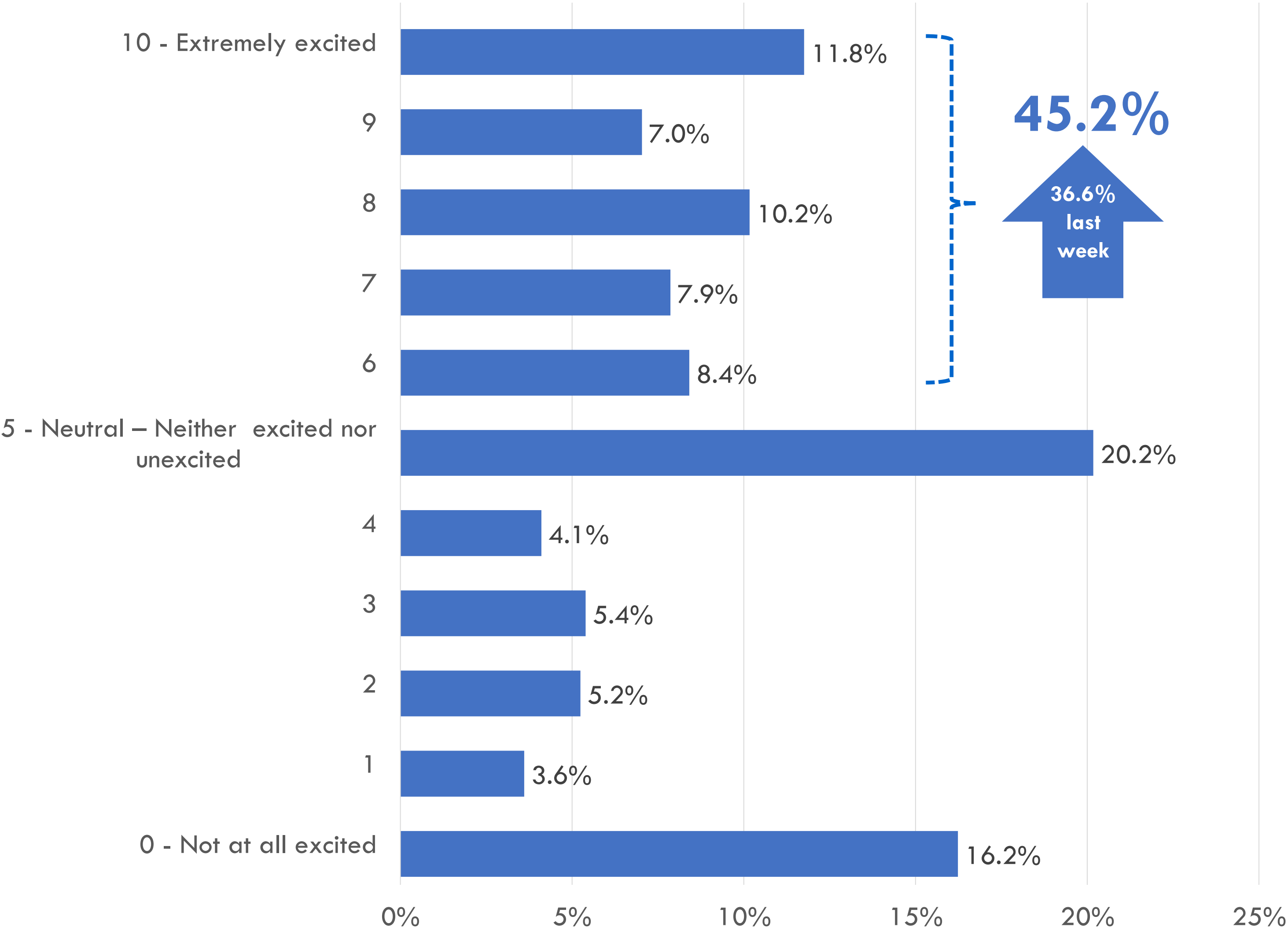
(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



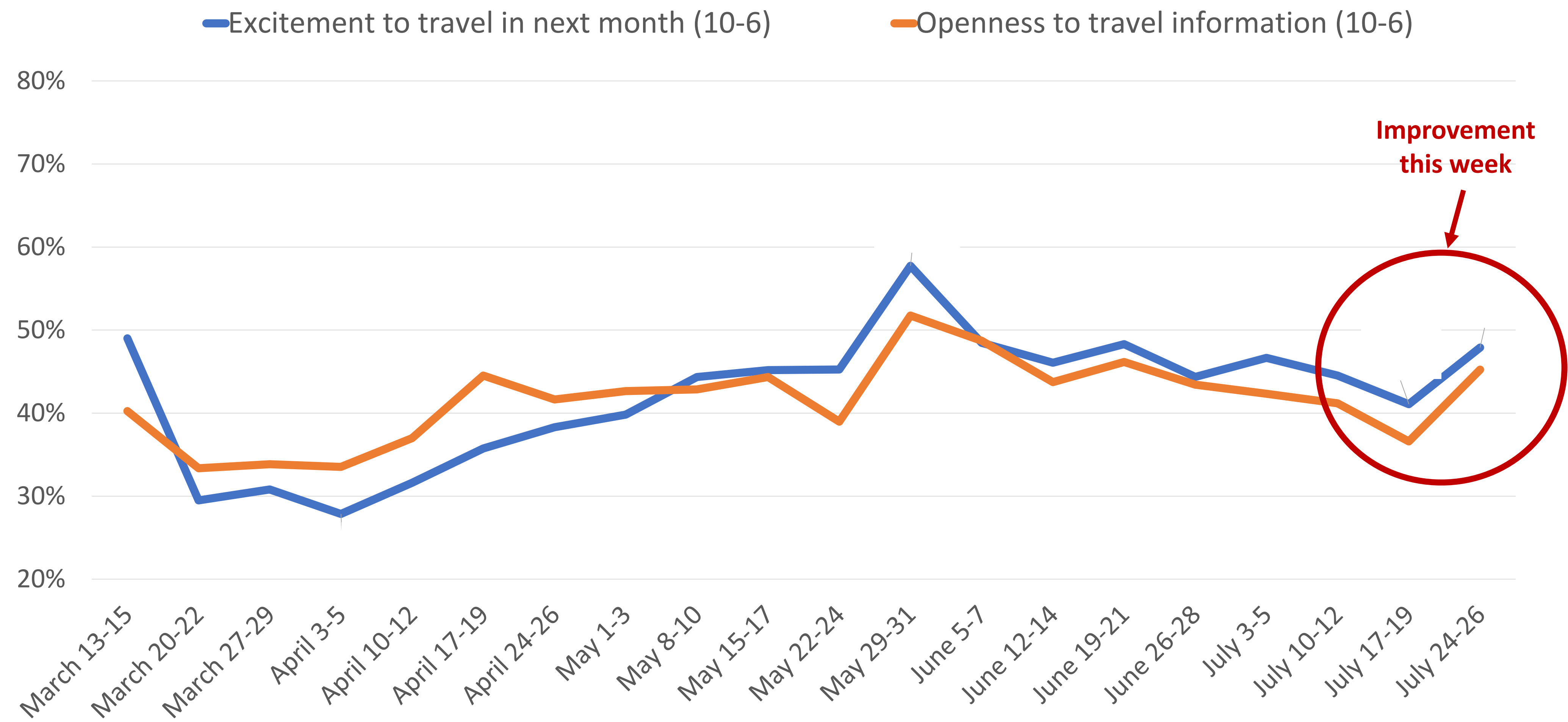
Openness to Travel Information

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

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July24-26, 2020)



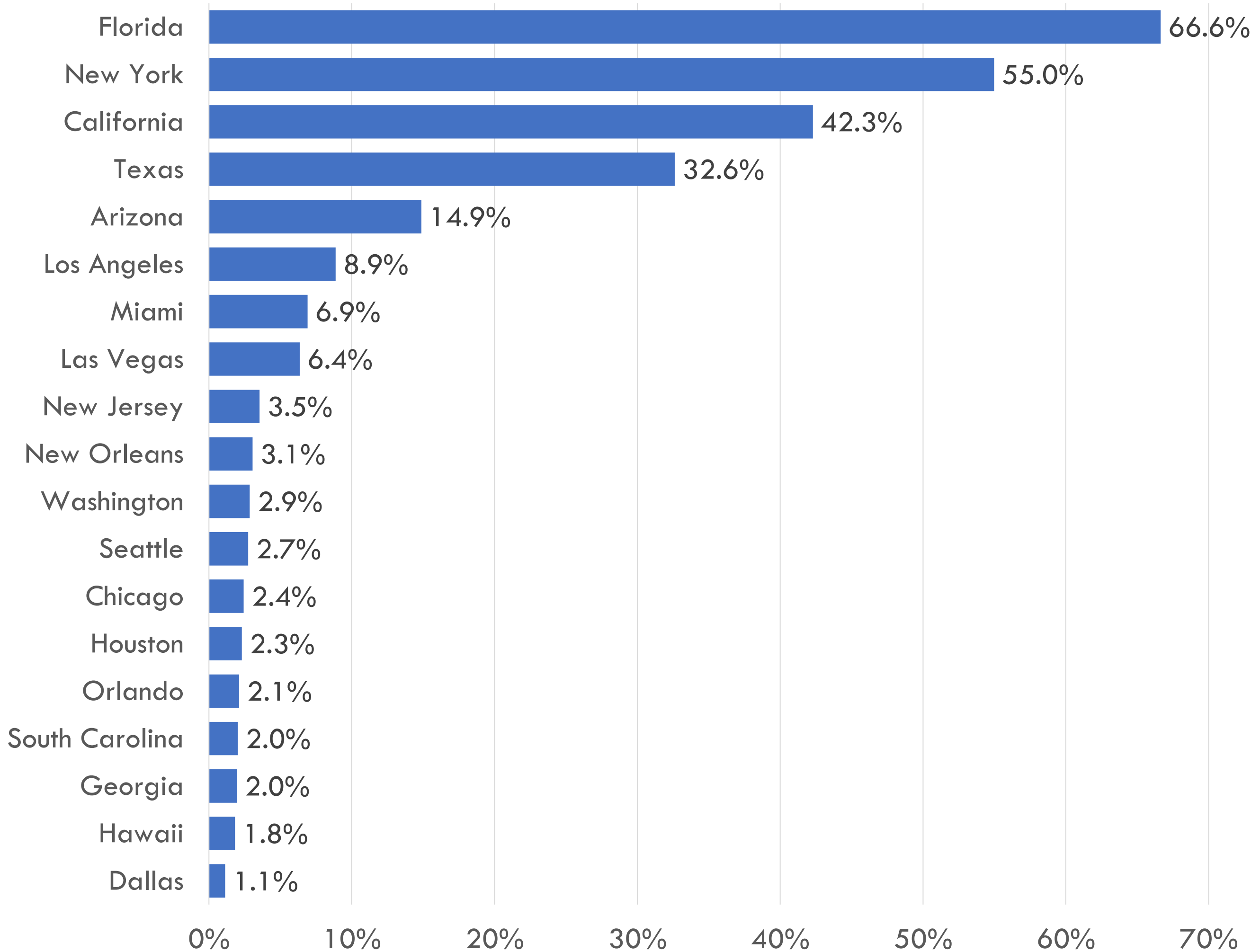
Excitement to Travel Now + Openness to Travel Information



Most Talked About Coronavirus Hotspots

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

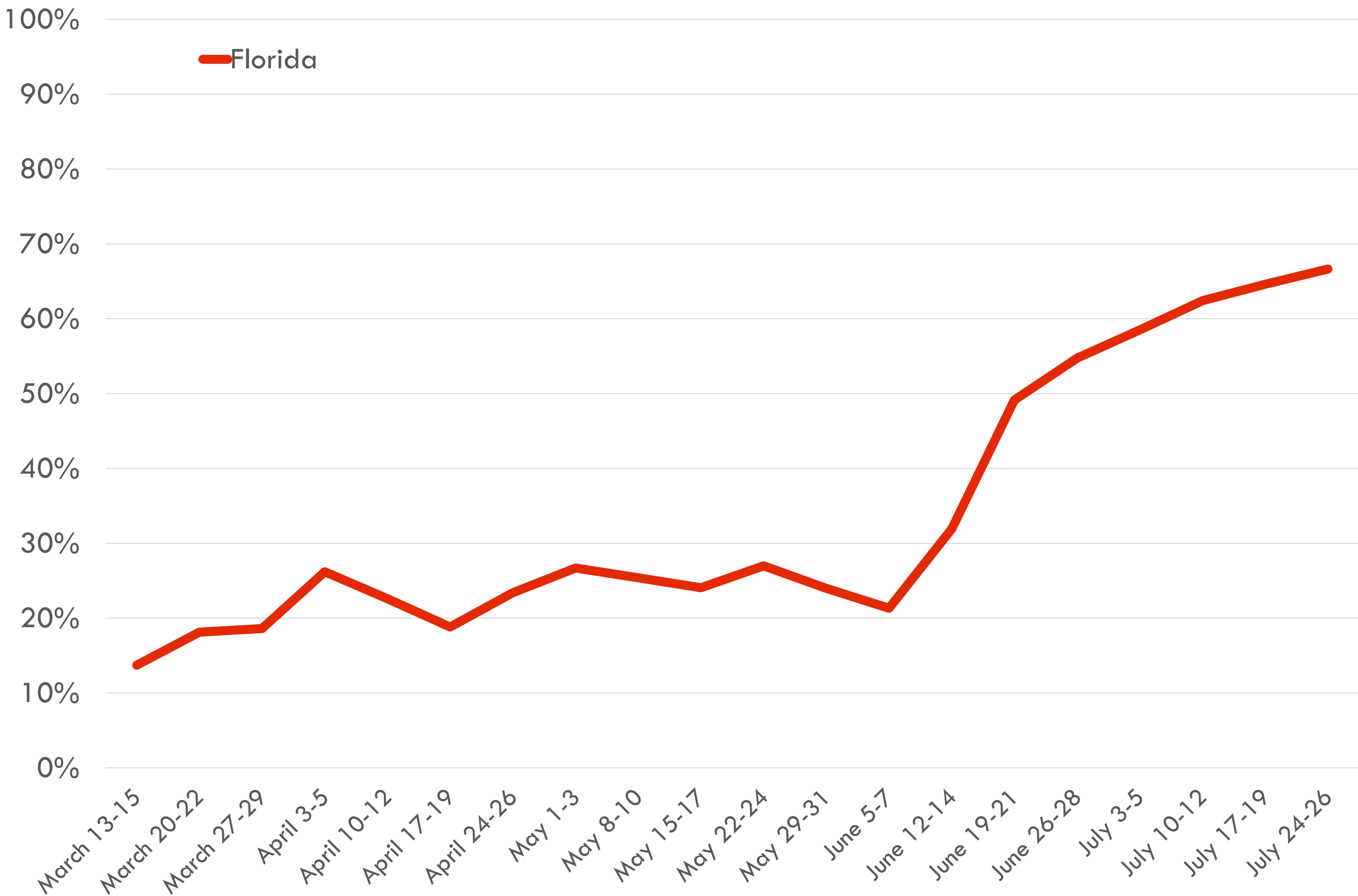
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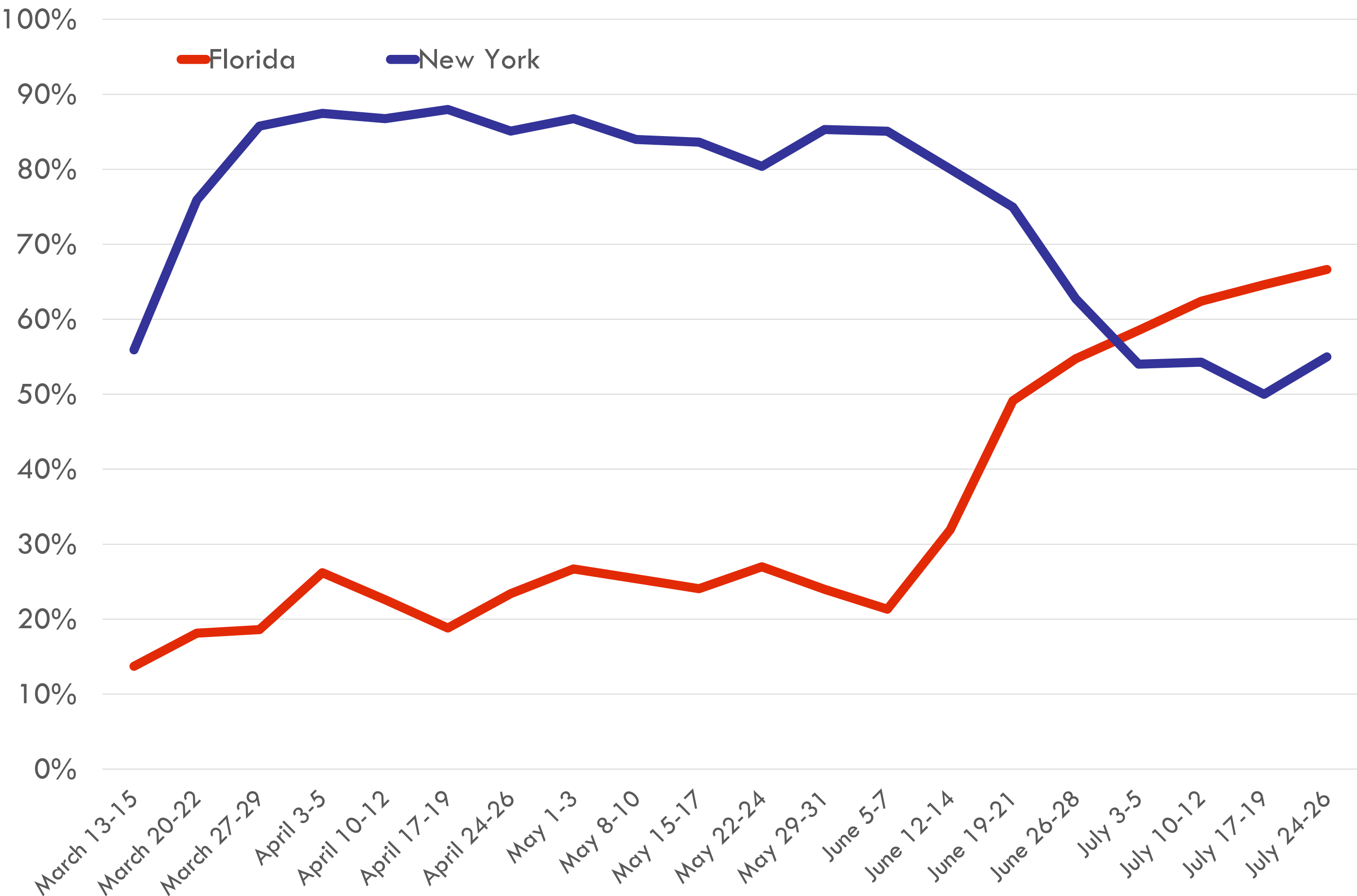
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)



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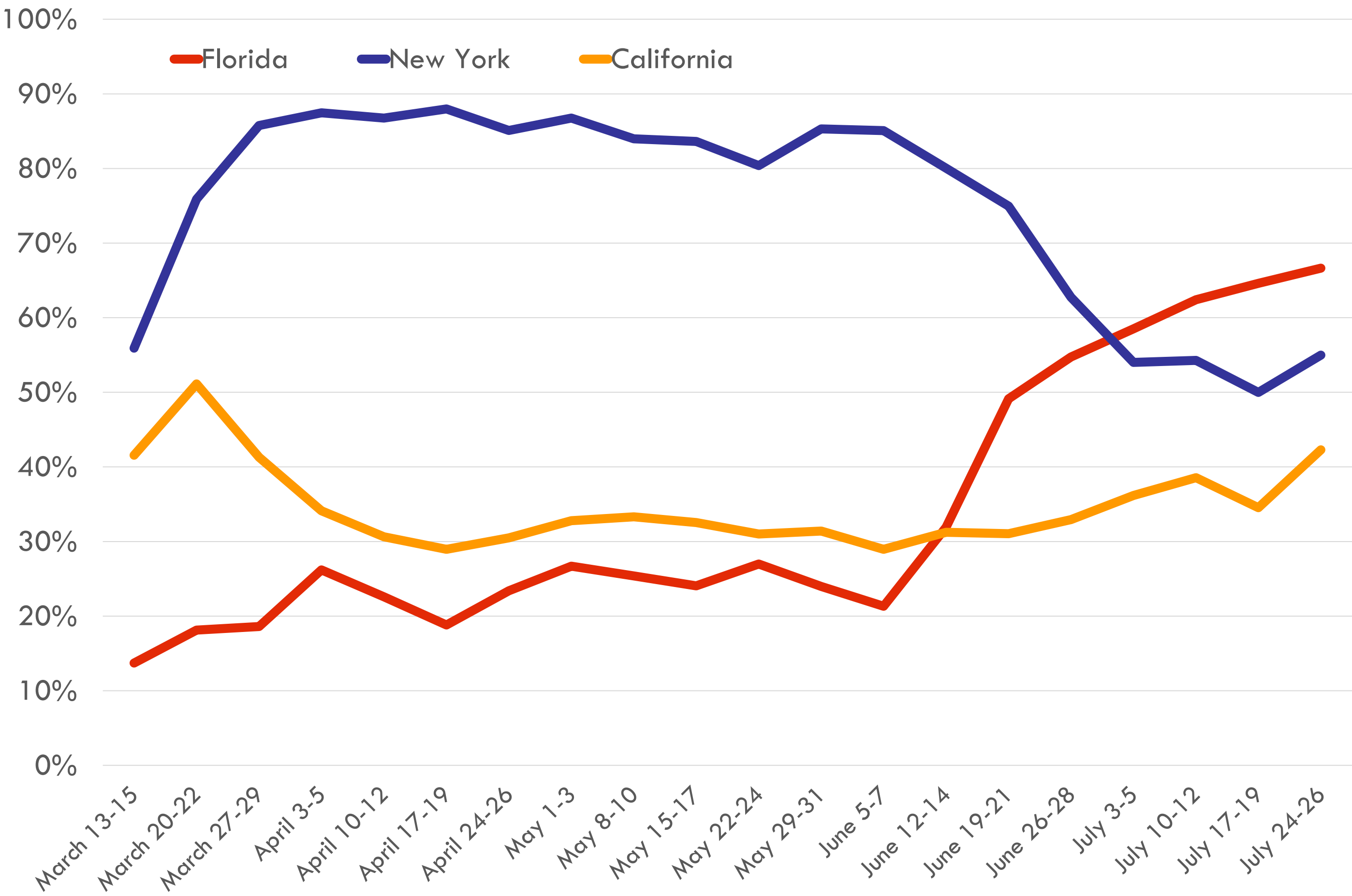
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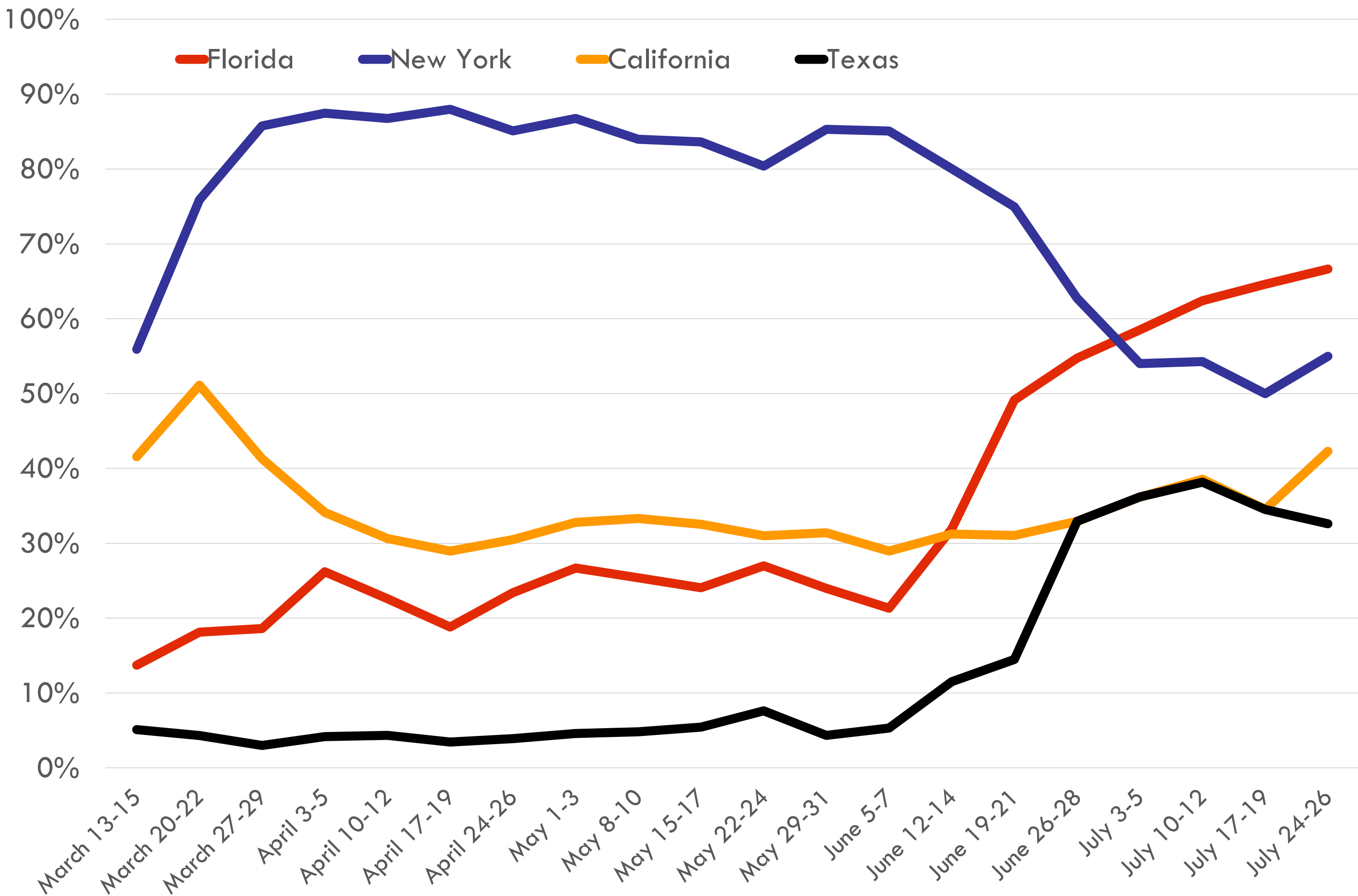
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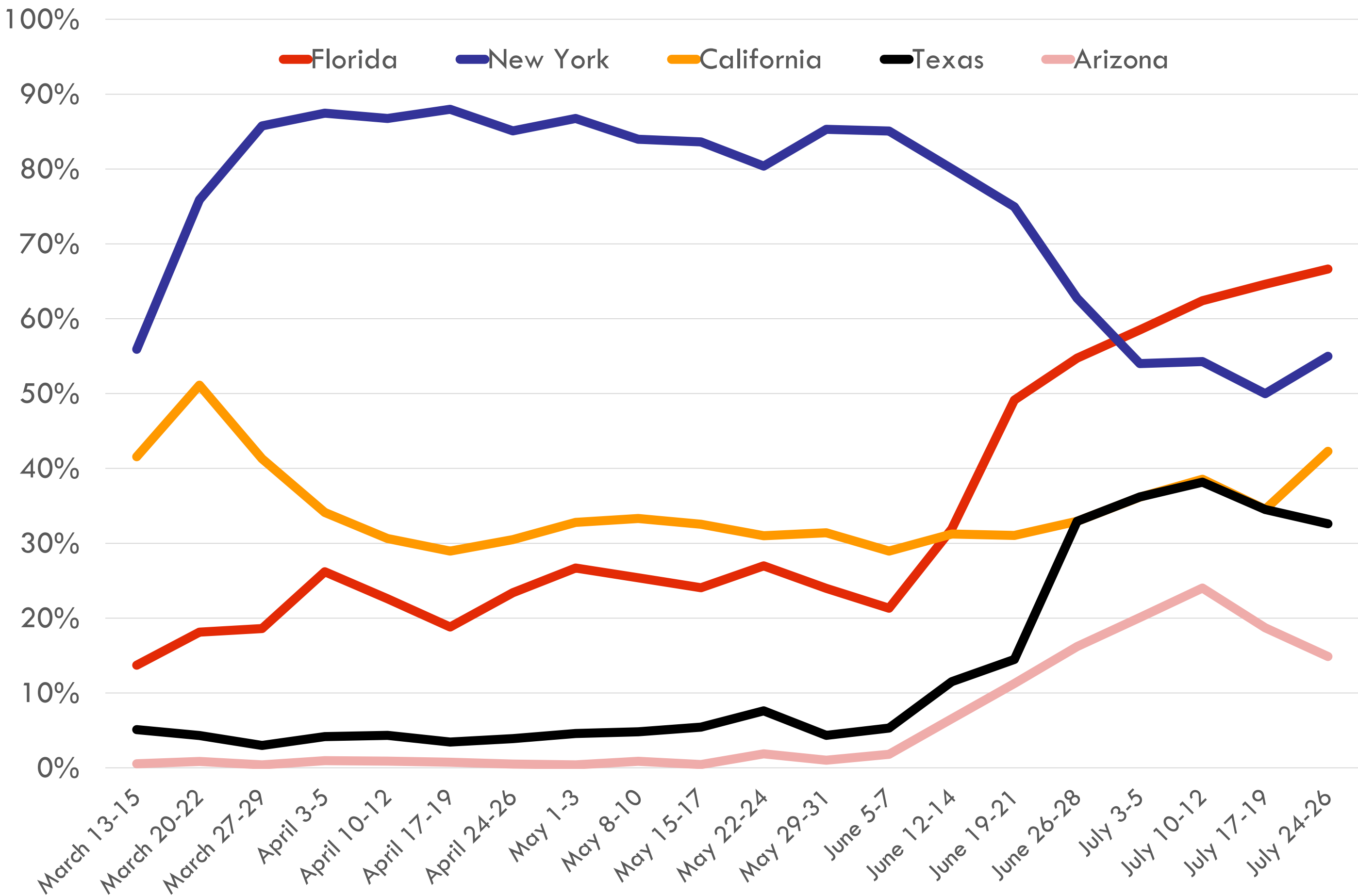
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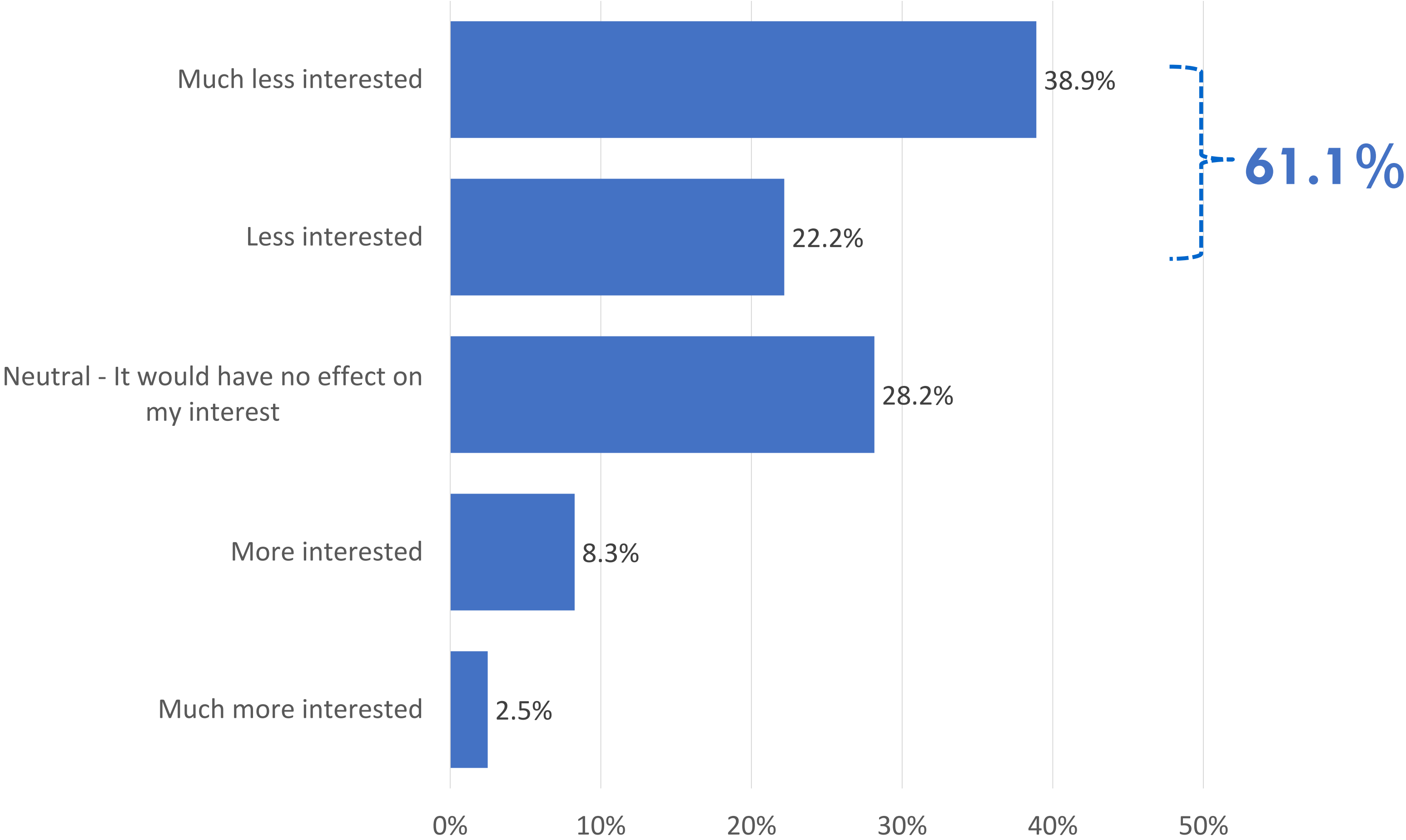


Impact of Coronavirus Issues on Post-pandemic Intent to Visit

Question: Suppose a travel destination you're interested in has had difficulty managing the Coronavirus situation.

How would this likely affect your interest in visiting that destination in the 6-month period immediately after the Coronavirus situation is resolved?

(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Audience Questions

Can you look into what travelers are thinking about the safety of different types of lodging?



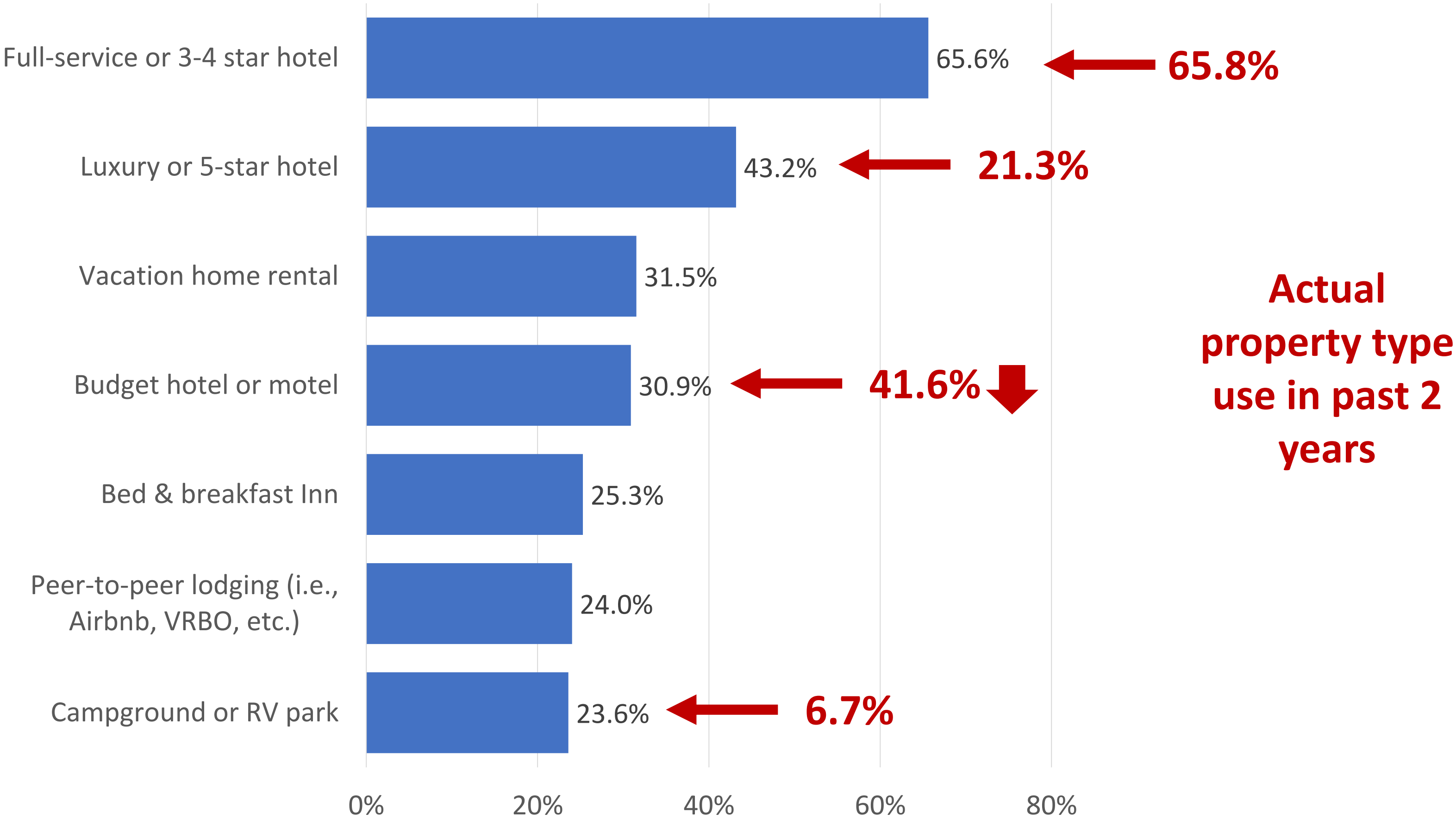
Types of Lodging They Would Use (Hypothetical Upcoming Trip)

Question: If you were to take a leisure trip in the NEXT SIX (6) MONTHS, what type of lodging would you most likely use?

PLEASE RANK UP TO THREE STARTING WITH THE ONE YOU WOULD BE MOST LIKELY TO USE

(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)

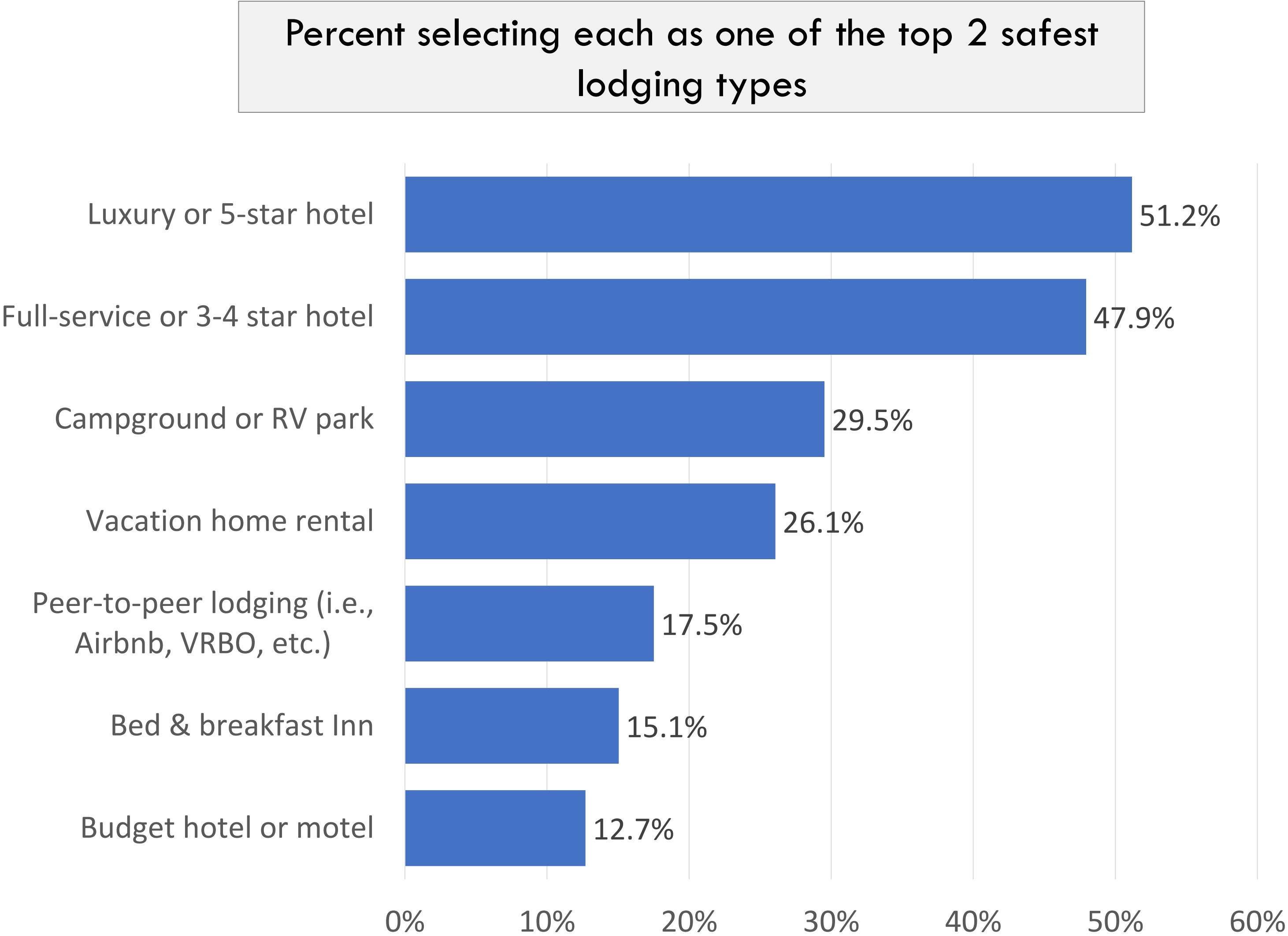
Percent selecting each as one of the top 3 lodging types



Safest Lodging Types

Question: Which would you consider to be the **SAFEST LODGING OPTIONS** for travel during the **NEXT SIX (6) MONTHS?** (Select your **TOP TWO**)

(Base: Wave 20 data. All respondents, 1,200 completed surveys. Data collected July 24-26, 2020)



Audience Questions

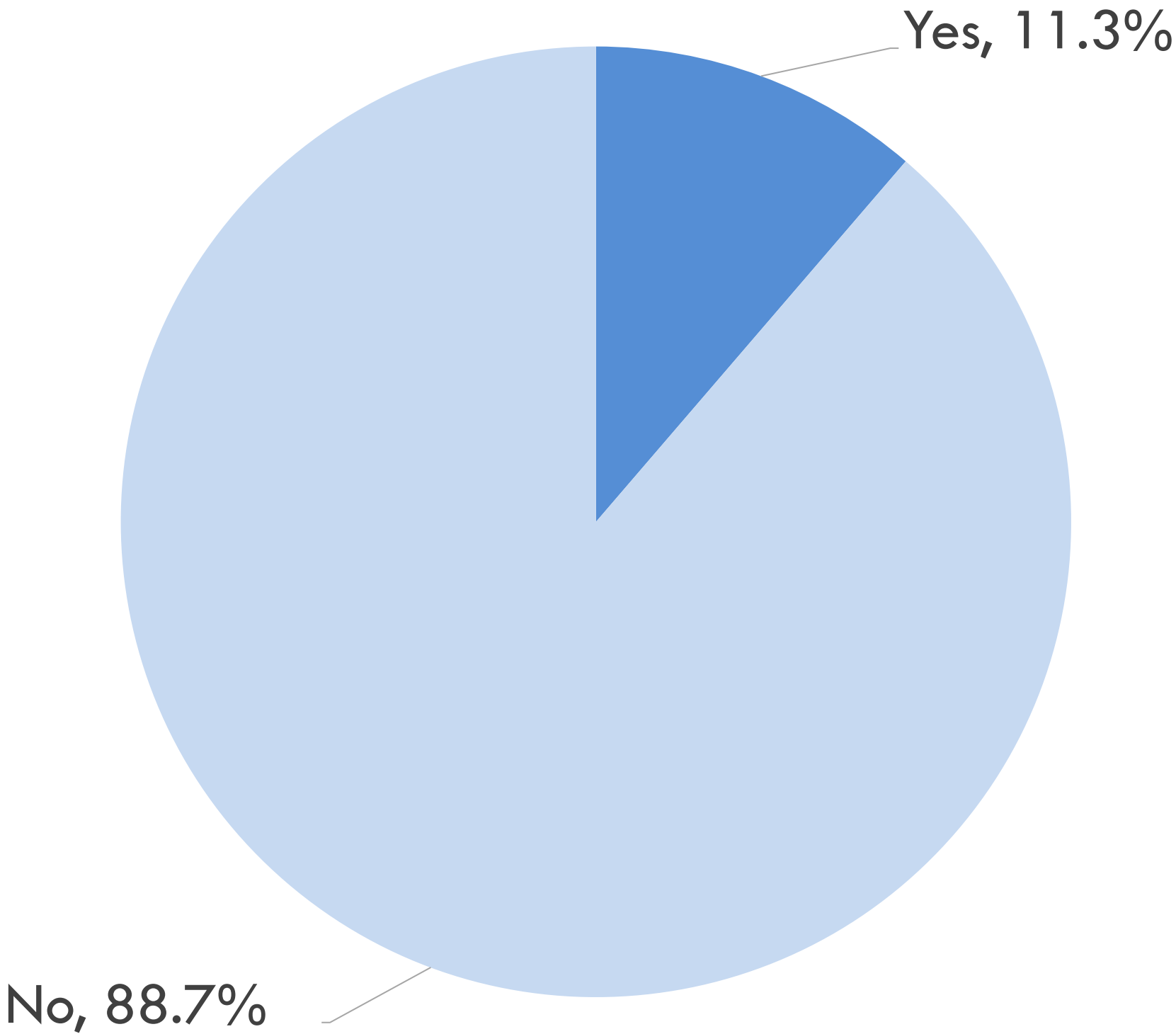
Are the safety protocols put in place at airports around the country satisfactory?



Travel by Air (Past 2 Months)

Question: In the PAST TWO (2) MONTHS, have you traveled on a commercial airline?

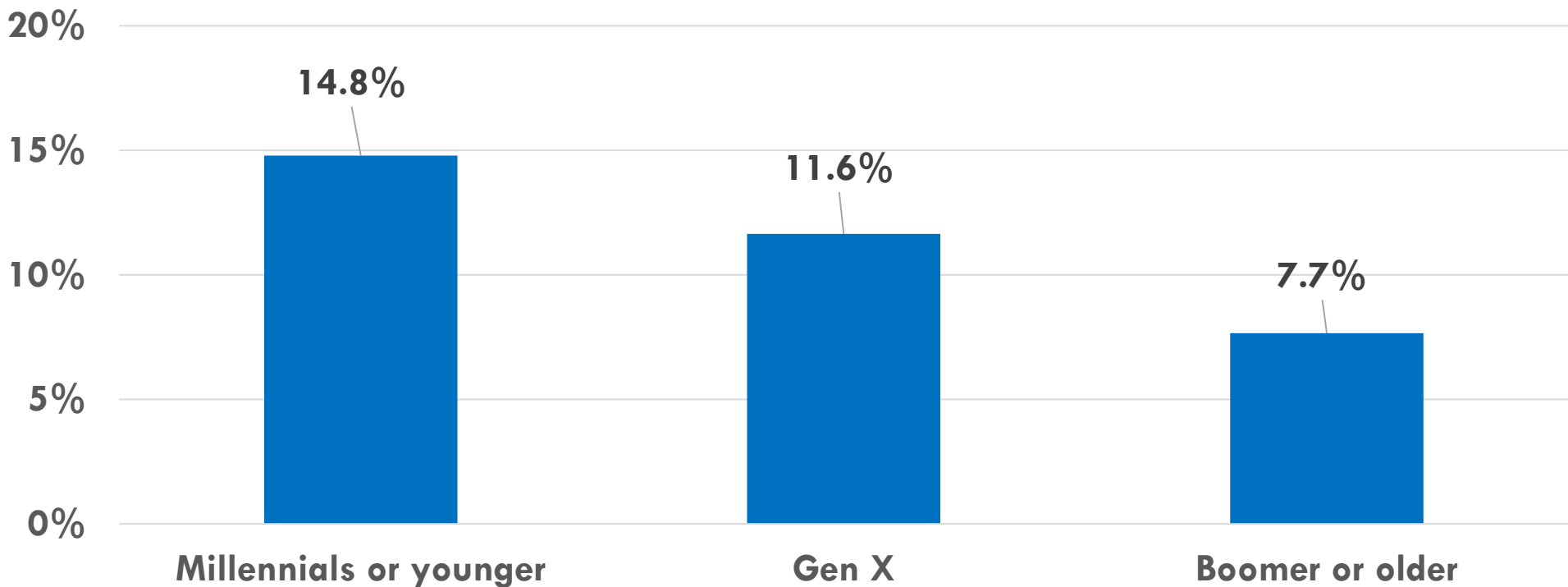
(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)



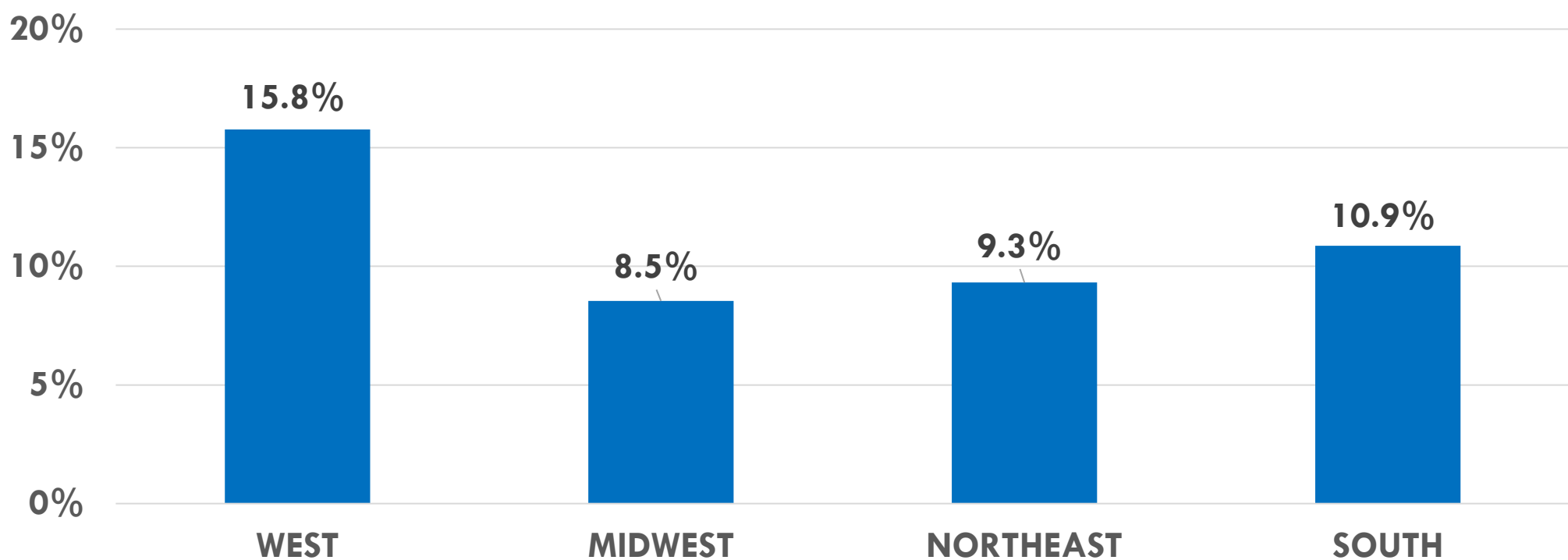
Who are More Likely to Have Traveled by Air (Past 2 Months)

Question: In the PAST TWO (2) MONTHS, have you traveled on a commercial airline?

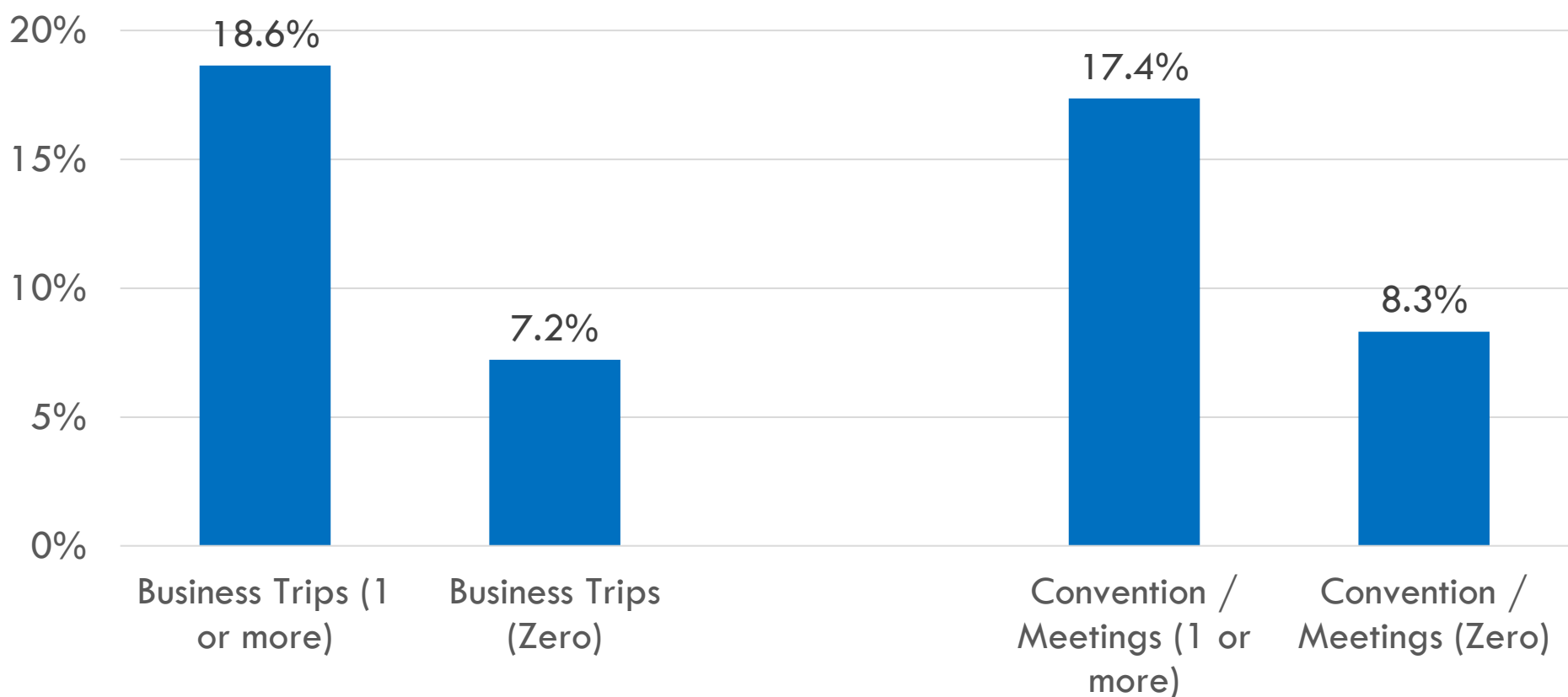
Younger Travelers



Residents of the Western States

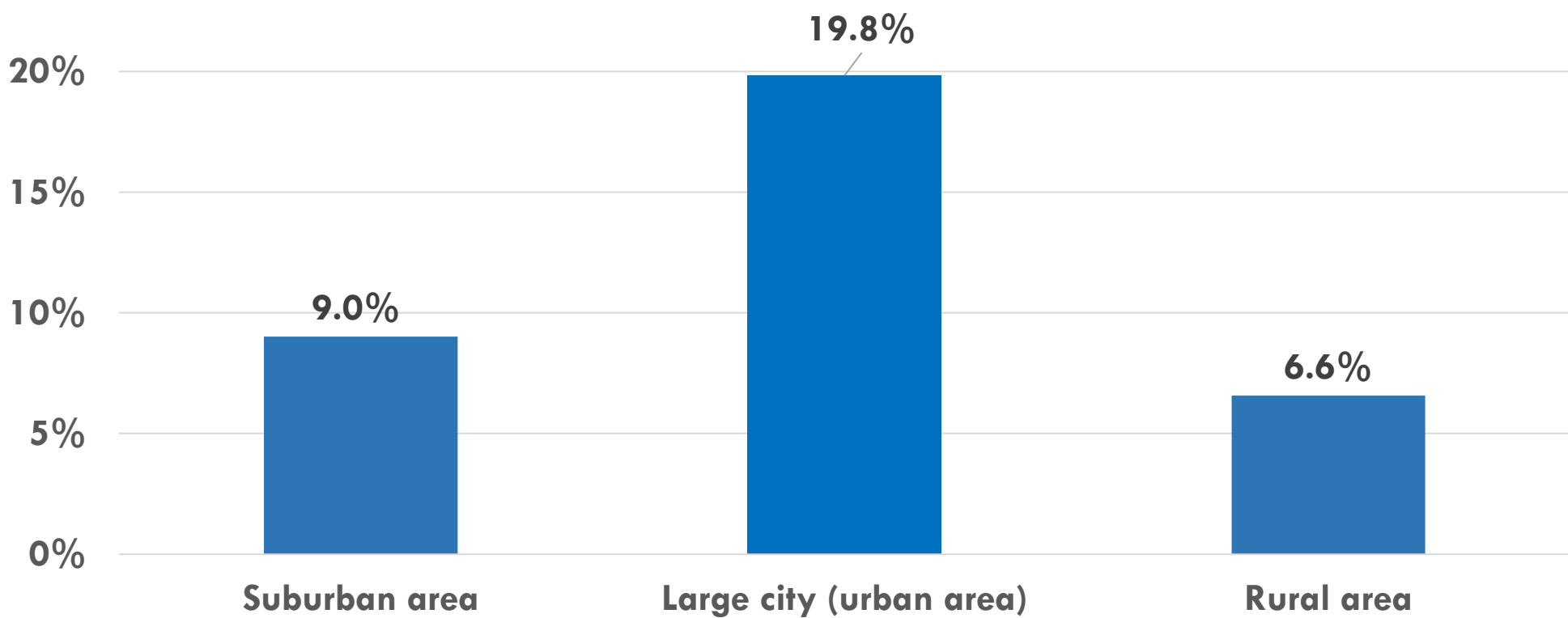


Business and Meetings Travelers*



*Took at least one business (conference/convention/meeting) trip in past 2 years

Urbanites

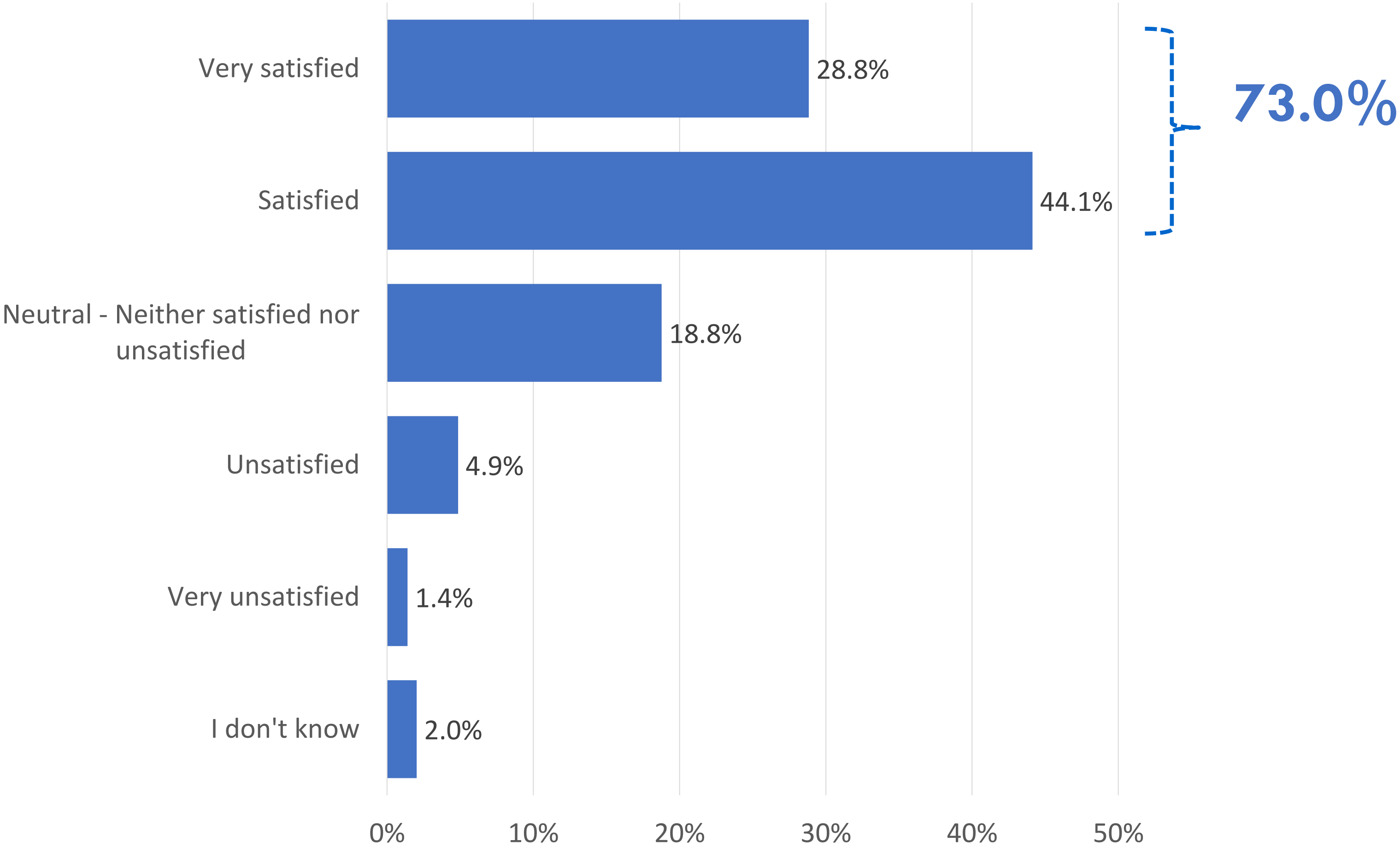


Satisfaction with Airport Performance

Question: Please think about YOUR MOST RECENT FLIGHT.

Overall, how satisfied are you with THE CORONAVIRUS SAFETY PROTOCOLS put in place by the airline(s) to protect your health during your travels?

(Base: Wave 20 data. Respondents traveling by air in past 2 months, 133 completed surveys. Data collected July 24-26, 2020)

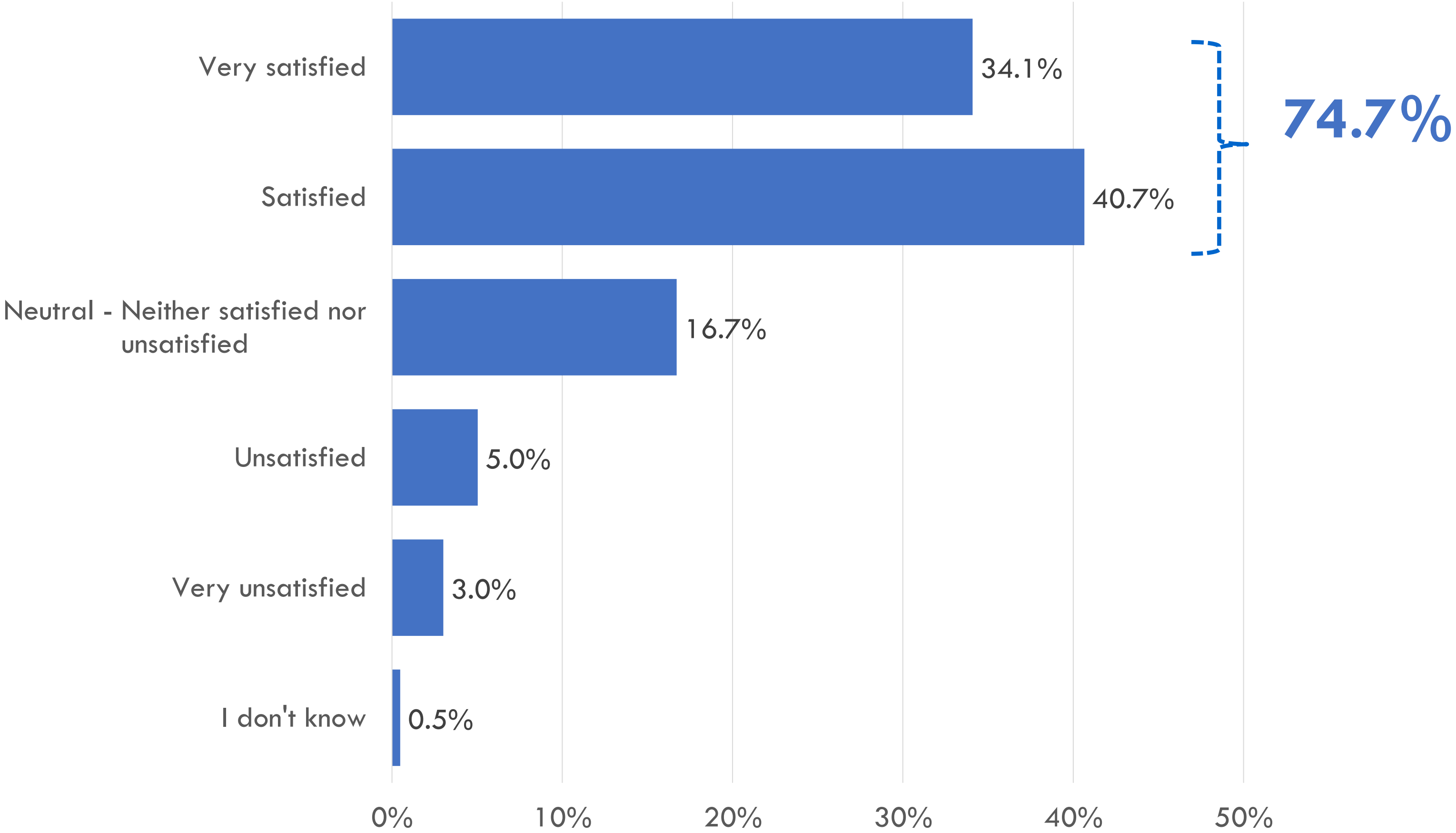


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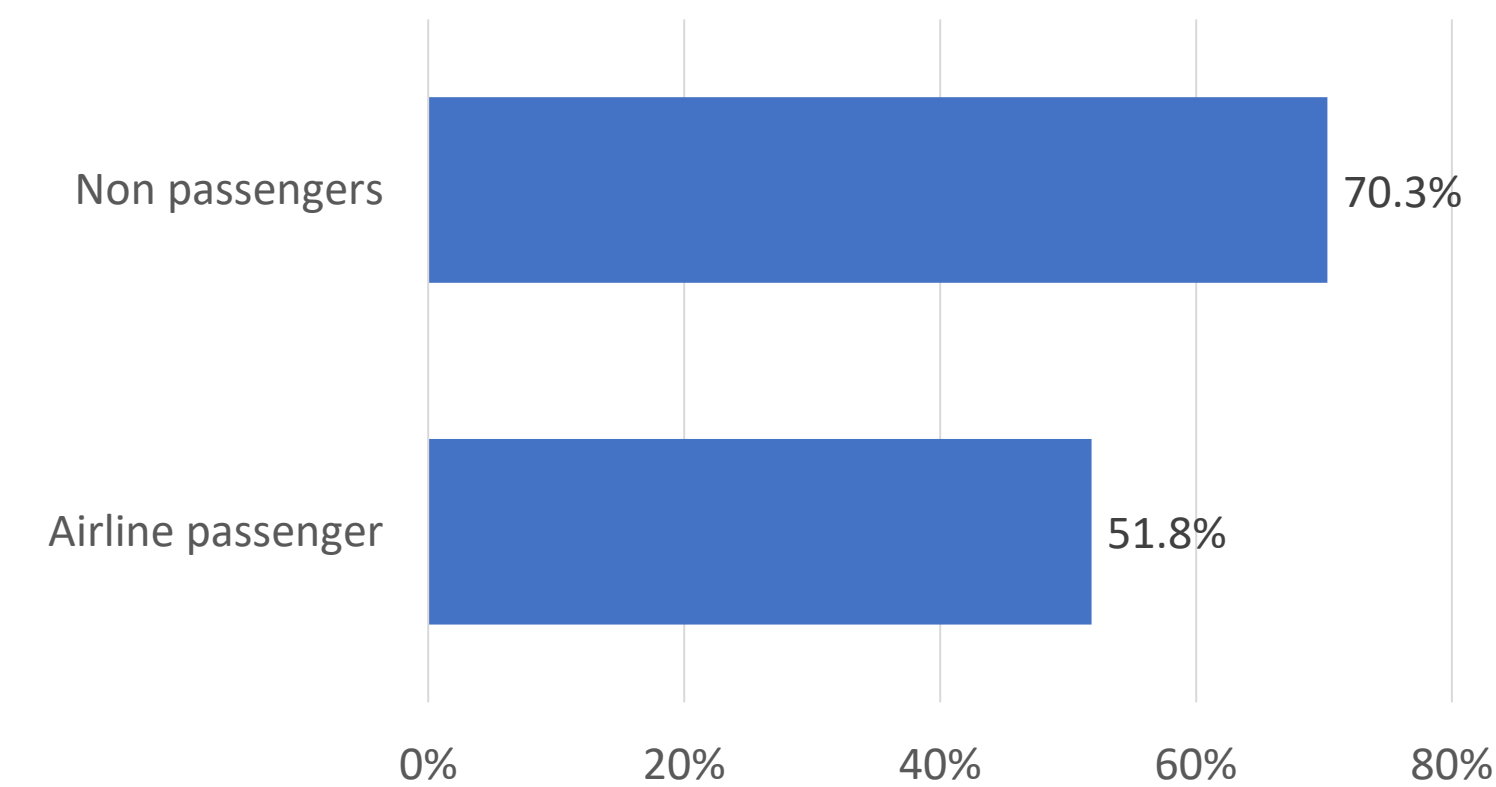
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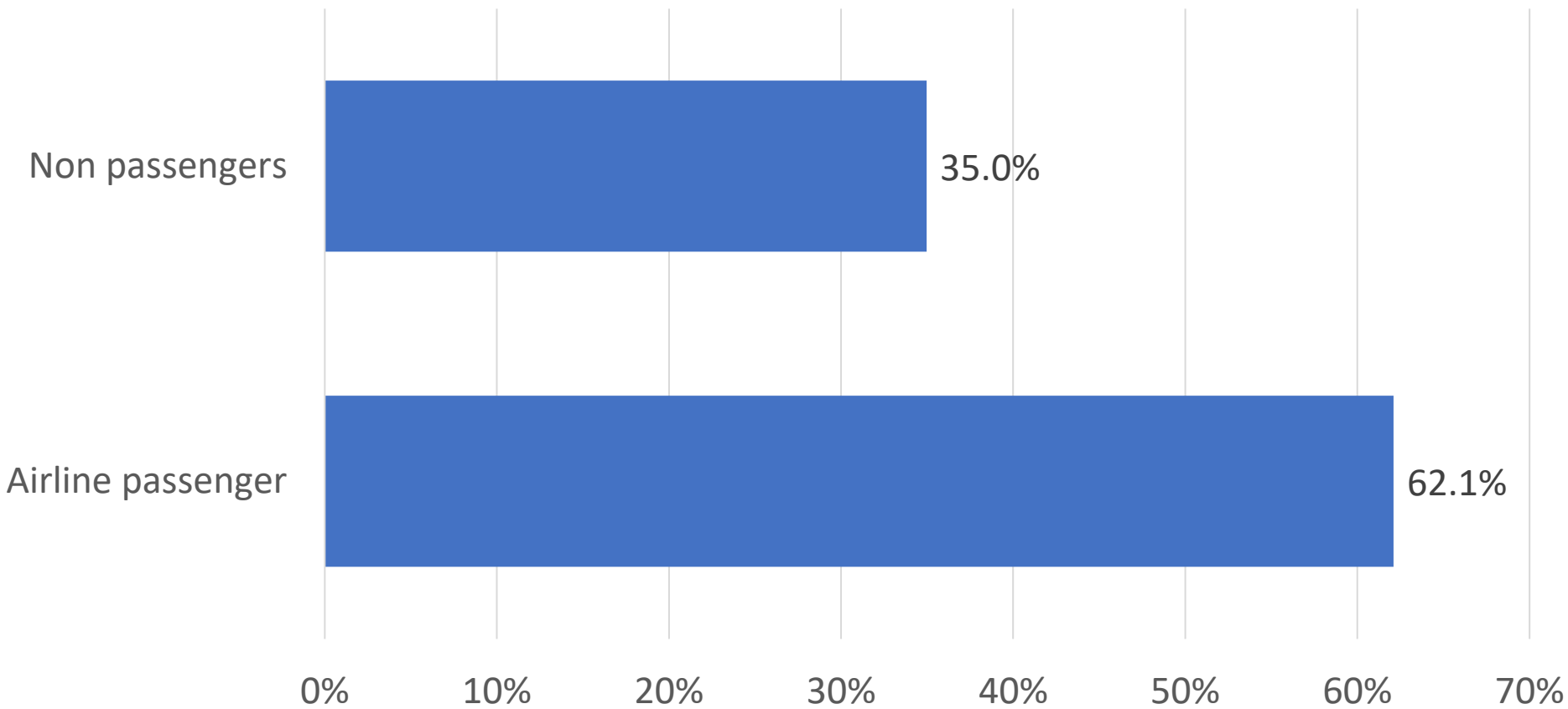
More on Who Current Airline Passengers Are...

Question: In the PAST TWO (2) MONTHS, have you traveled on a commercial airline?

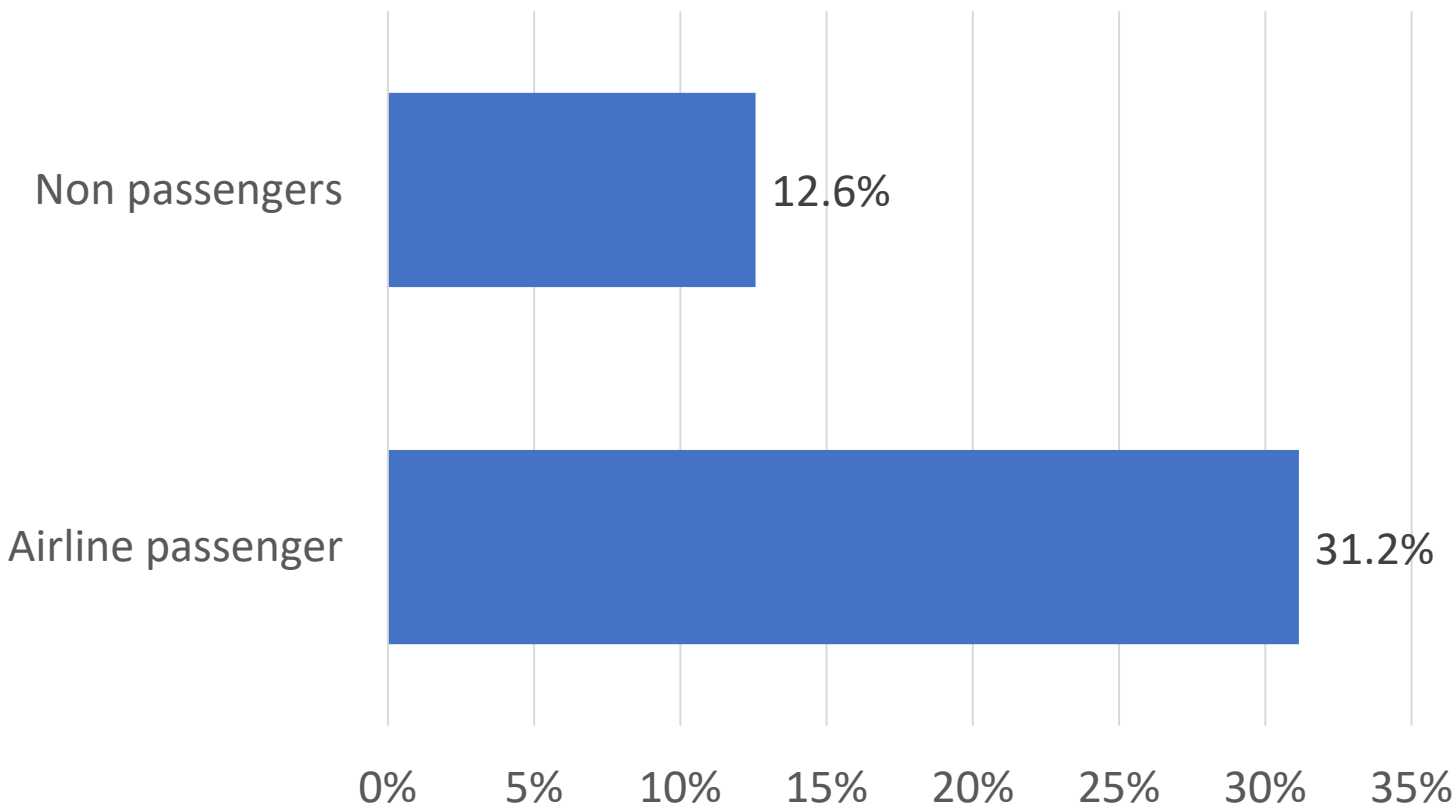
Always wear a mask when going out in public



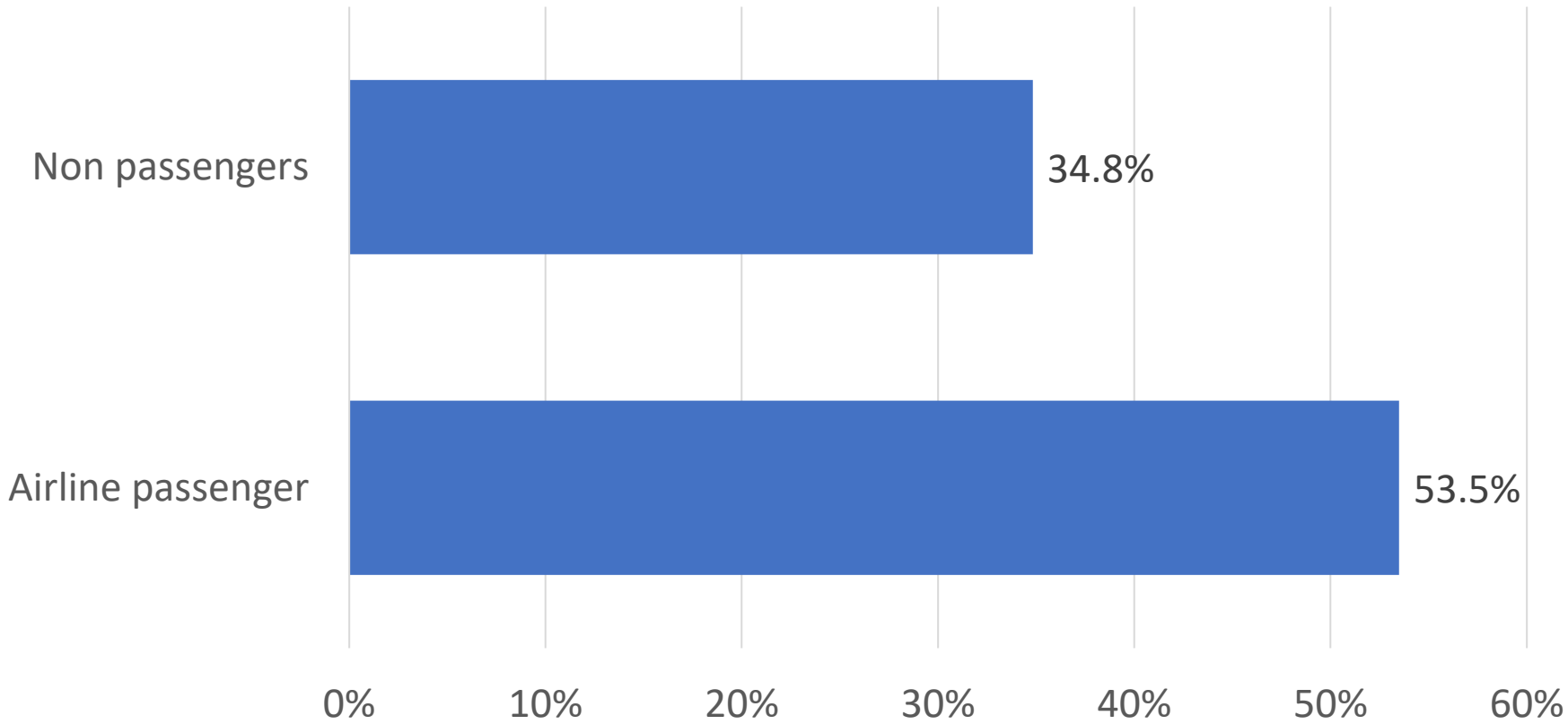
Expects to be Traveling this Fall



Expect Coronavirus Situation to “Get Better” (Next Month)



Feels Comfortable Going Out Now in Their Own Community



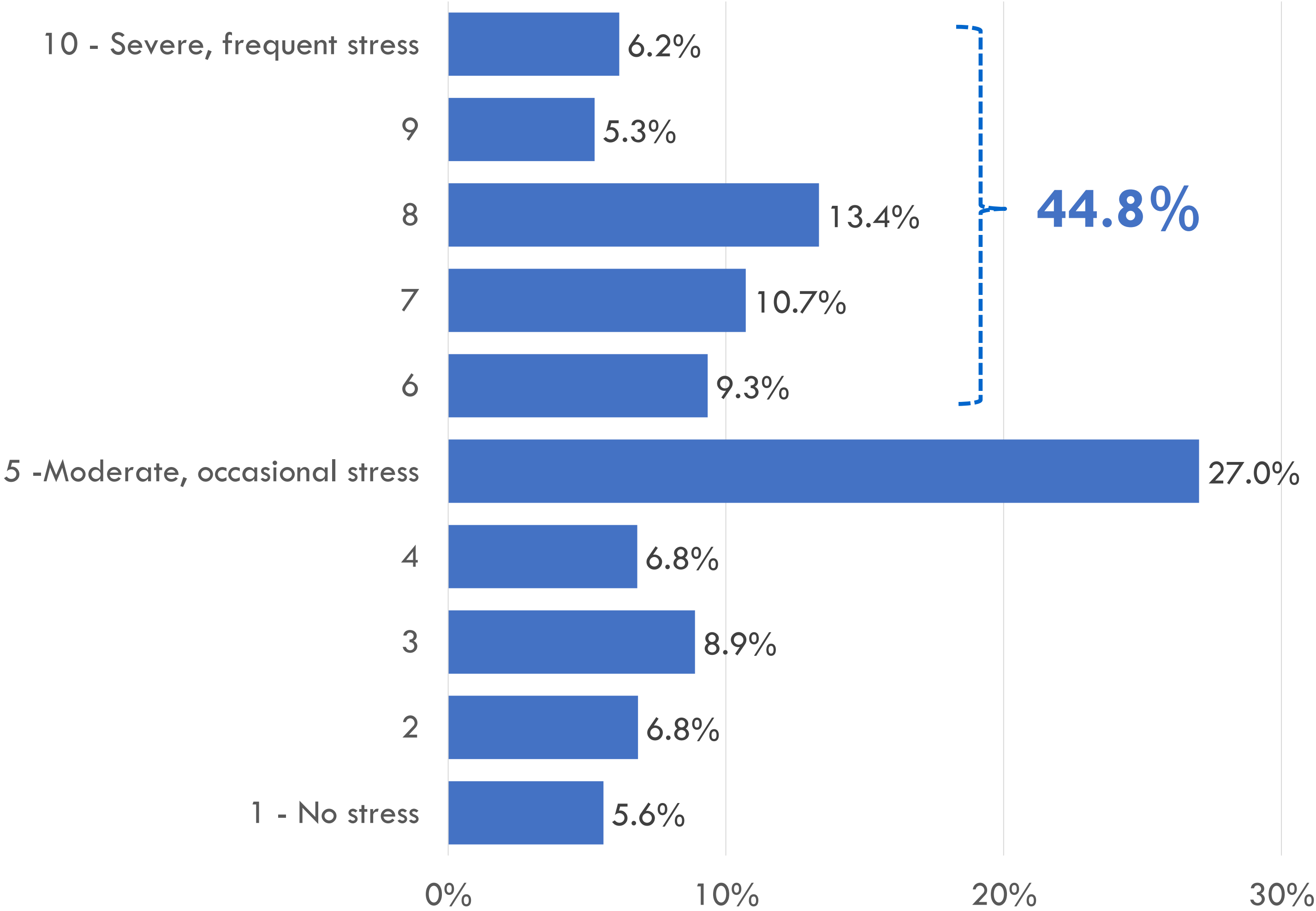


HOW ARE WE FEELING?

Stress in Daily Life (Past Month)

Question: Thinking about the last month, please rate your average level of daily stress from 1 - 10.

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)

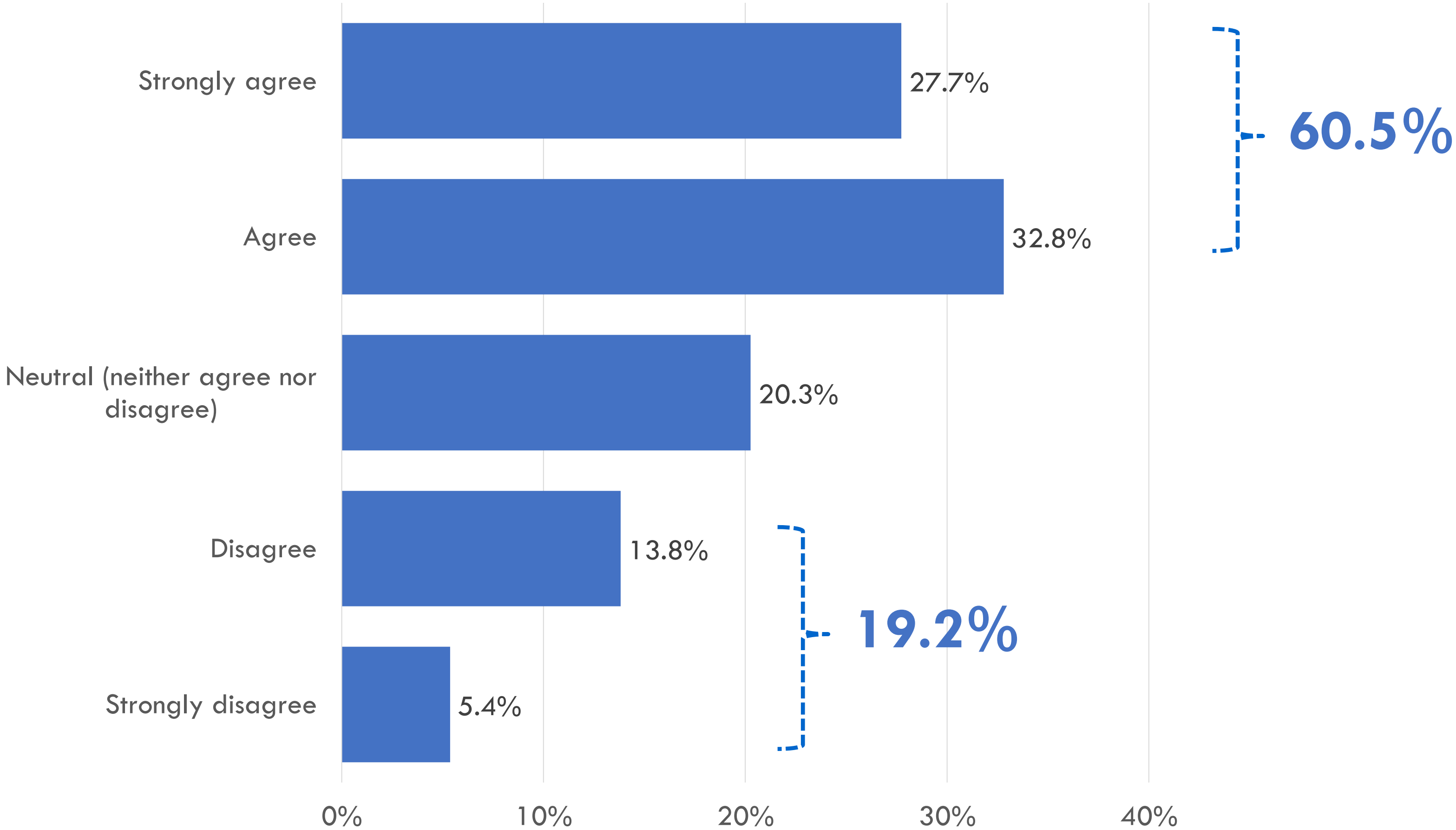


Ability to Enjoy Travel Right Now

Question: Statement agreement.

If I were to travel now for leisure, I would not be able to fully enjoy it.

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)

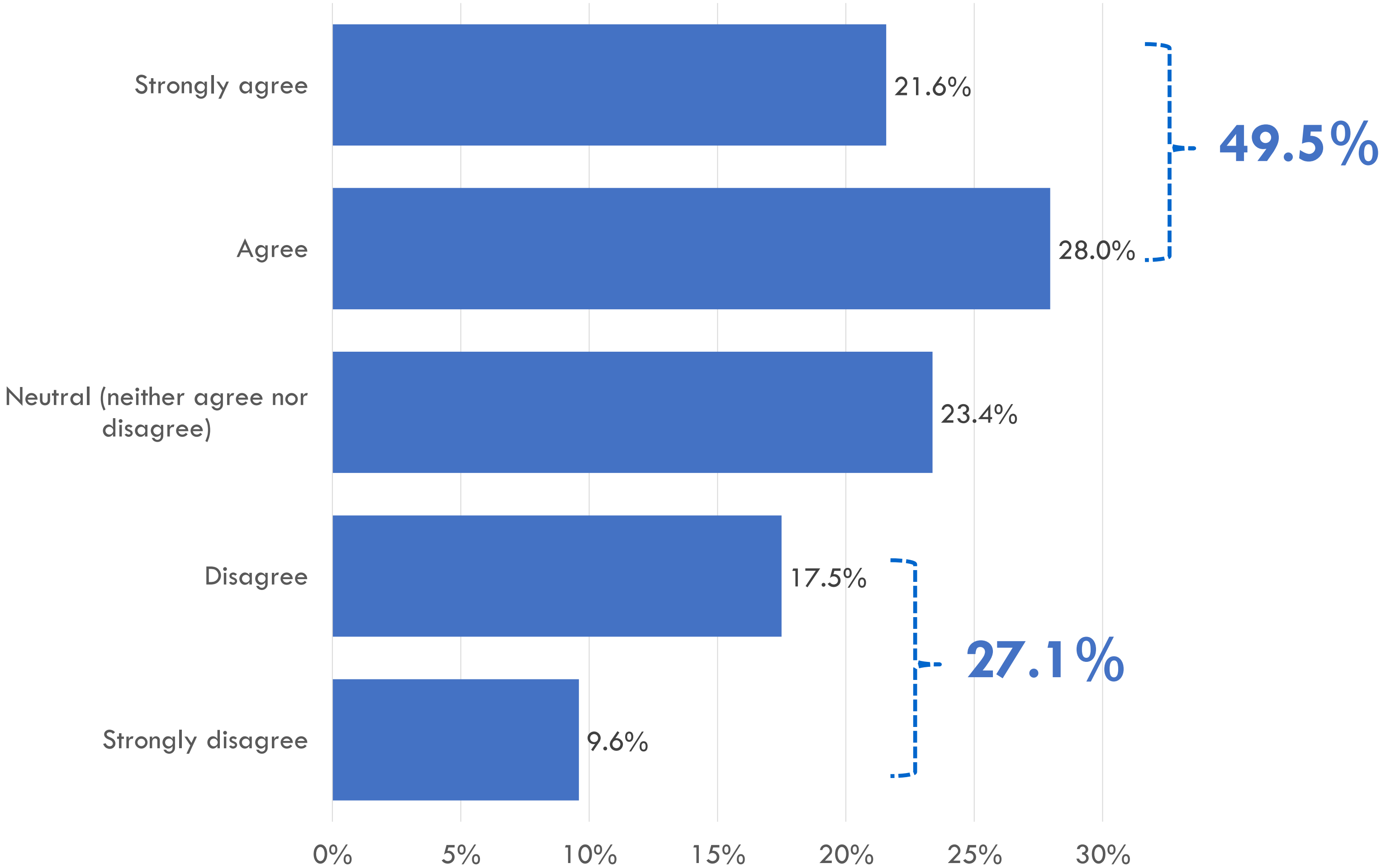


Loss of Interest in Leisure Travel

Question: Statement agreement.

I have lost my interest in/taste for traveling for the time being

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)



PANDEMIC STRESS + TRAVEL MORALE



44.8% report **higher degrees of daily stress** right now



"If I were to travel now for leisure, I would not be able to fully enjoy it" **60.5%** agree or strongly agree

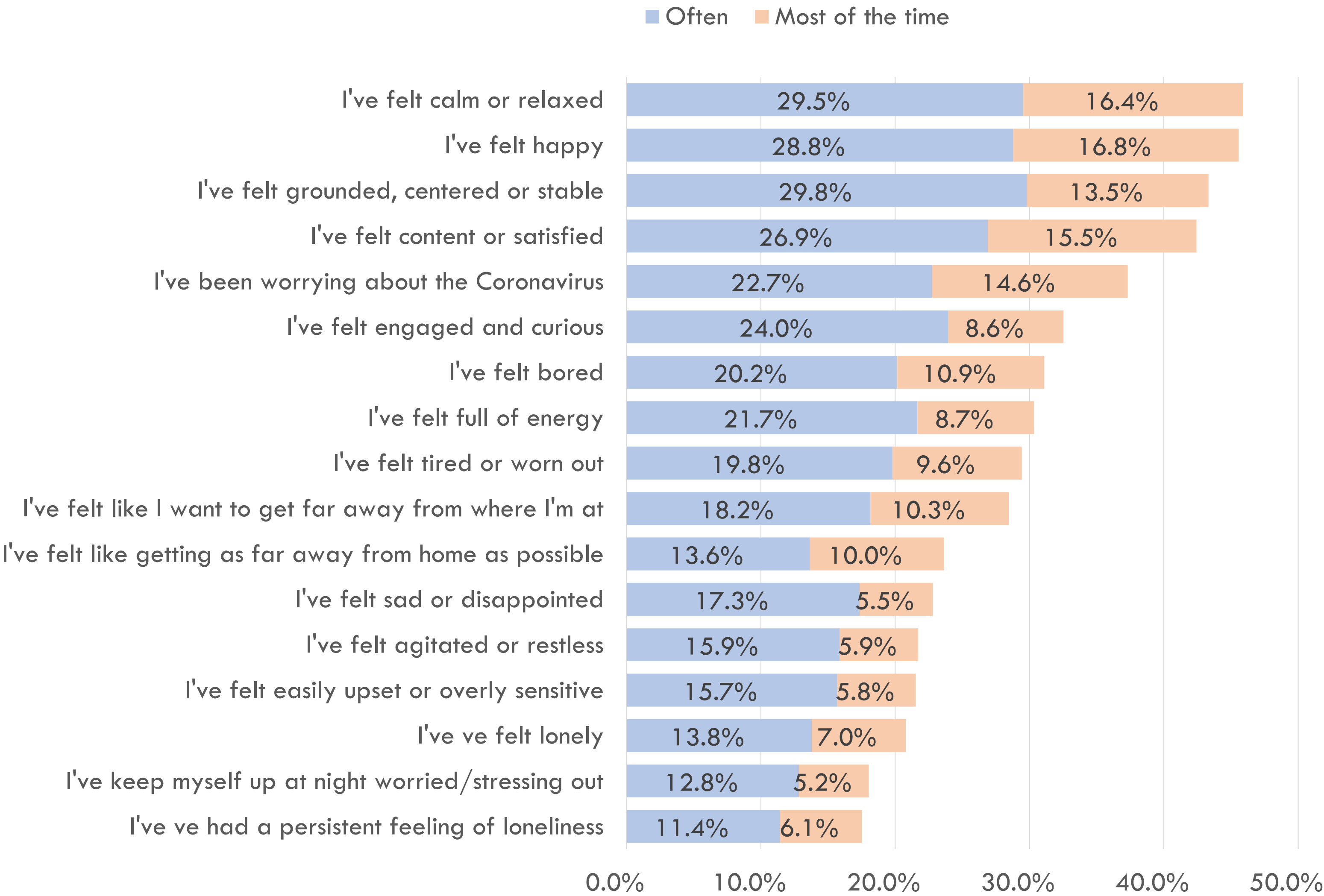


"I have lost my interest in/taste for traveling for the time being" **49.5%** agree or strongly agree

Mapping Travelers' Emotions

Question: Please tell us about how you have been feeling DURING THE LAST MONTH . Using the scale below, tell us how often you feel each?

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)



FEELINGS DURING THE PANDEMIC IN THE LAST MONTH (% “OFTEN” OR “MOST OF THE TIME”)



Calm or Relaxed
45.9%



Agitated or Restless
21.7%



Happy
45.6%



Sad or Disappointed
22.8%



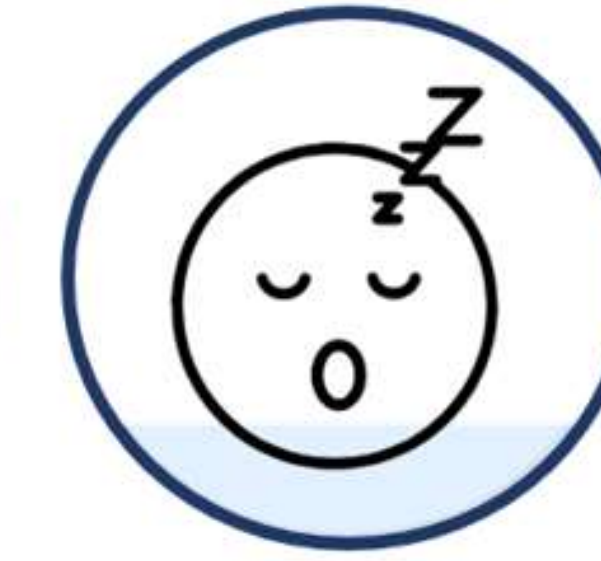
Engaged and Curious
32.5%



Bored
31.1%



Full of Energy
30.3%

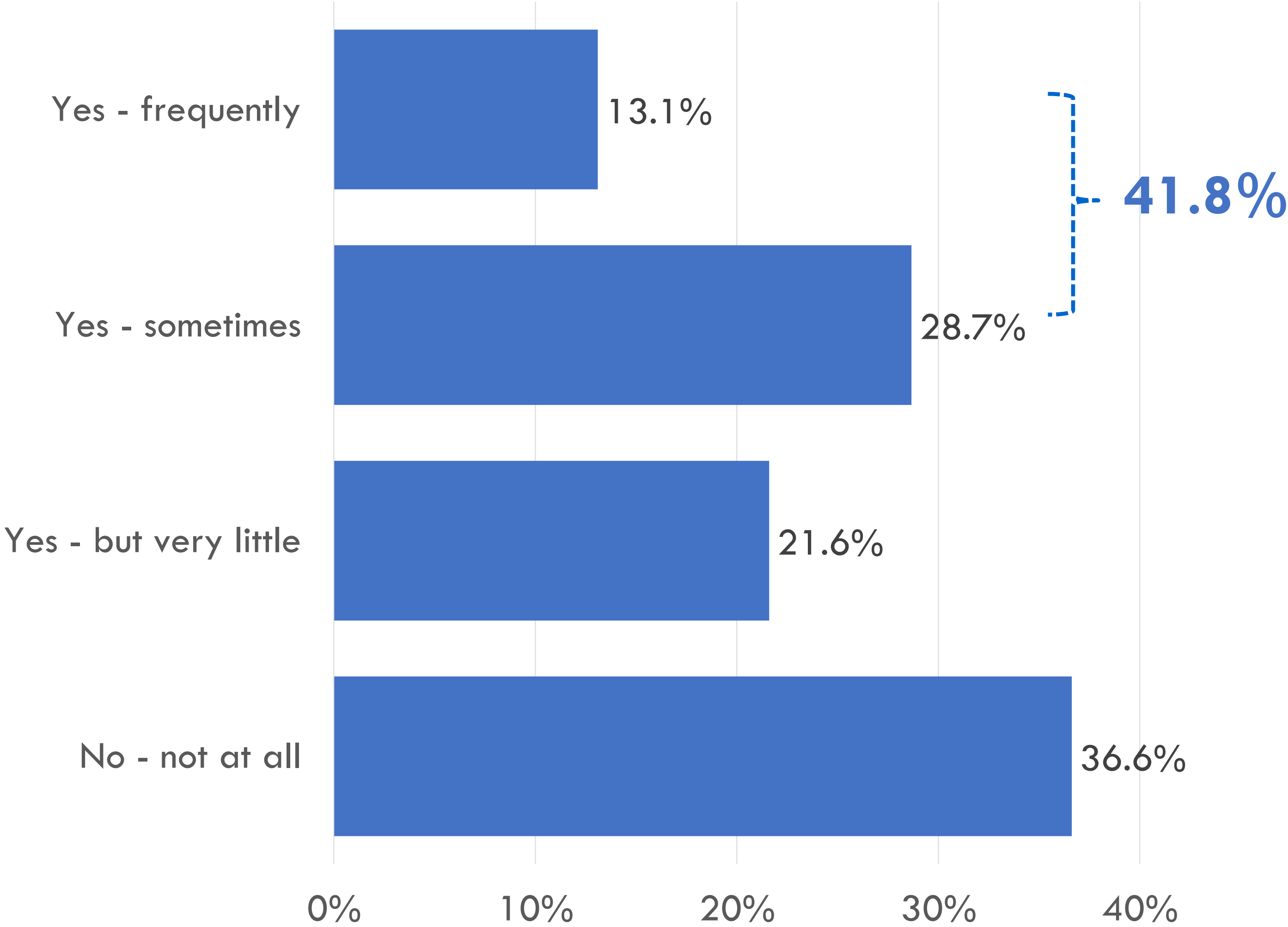


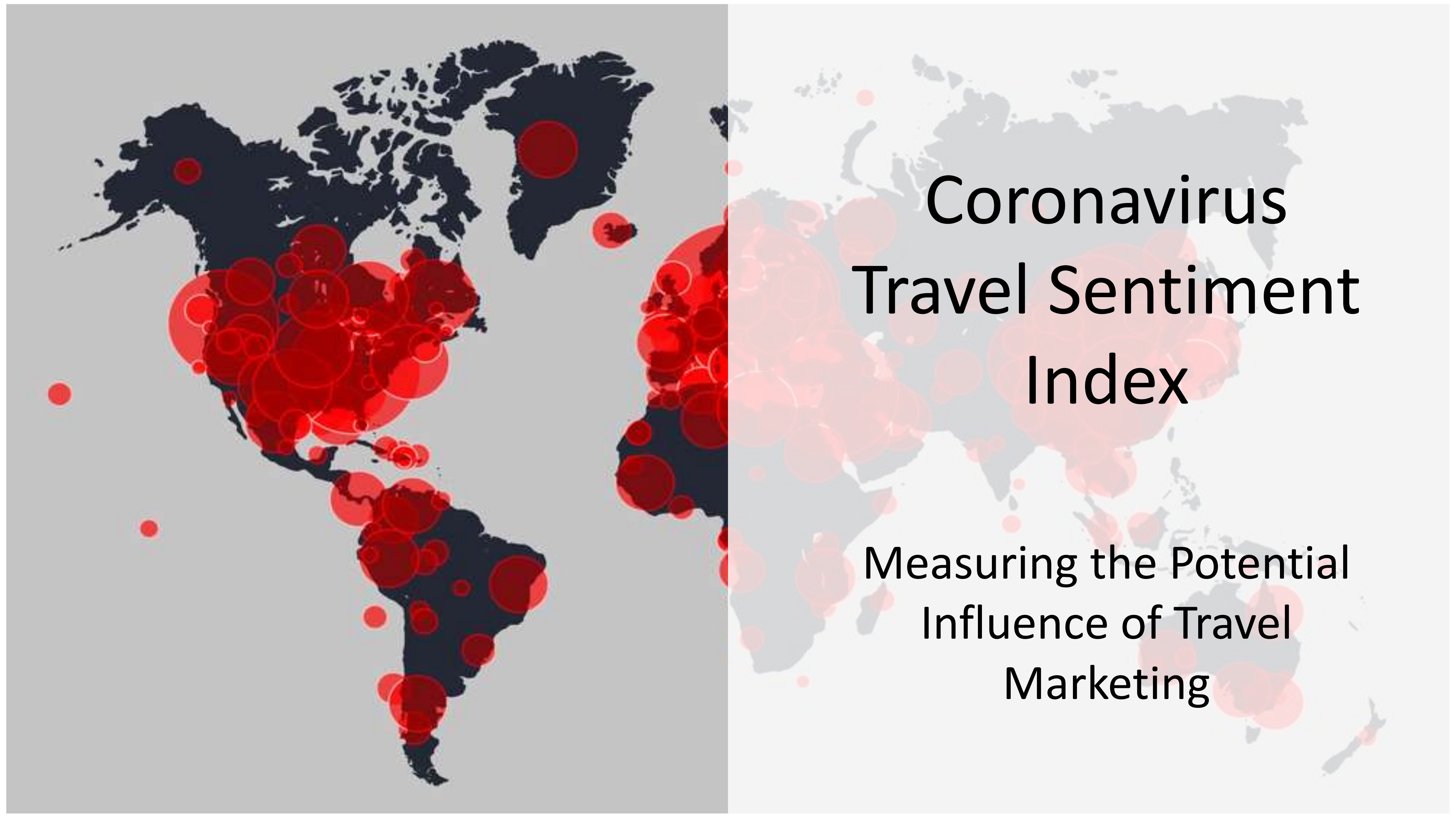
Tired or Worn Out
29.4%

Loss of Sleep During the Pandemic

Question: Since the Coronavirus has emerged, have you experienced any sleep disturbances or changes in your sleep pattern?

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)



A world map visualization showing the Coronavirus Travel Sentiment Index. The map is split into two panels. The left panel shows North and South America with a dark grey background and large, dense red bubbles of varying sizes, indicating high sentiment. The right panel shows Europe, Africa, and Asia with a light grey background and smaller, more sparse red bubbles, indicating lower sentiment. The text is overlaid on the right panel.

Coronavirus Travel Sentiment Index

Measuring the Potential
Influence of Travel
Marketing

What is a Predictive Index?



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



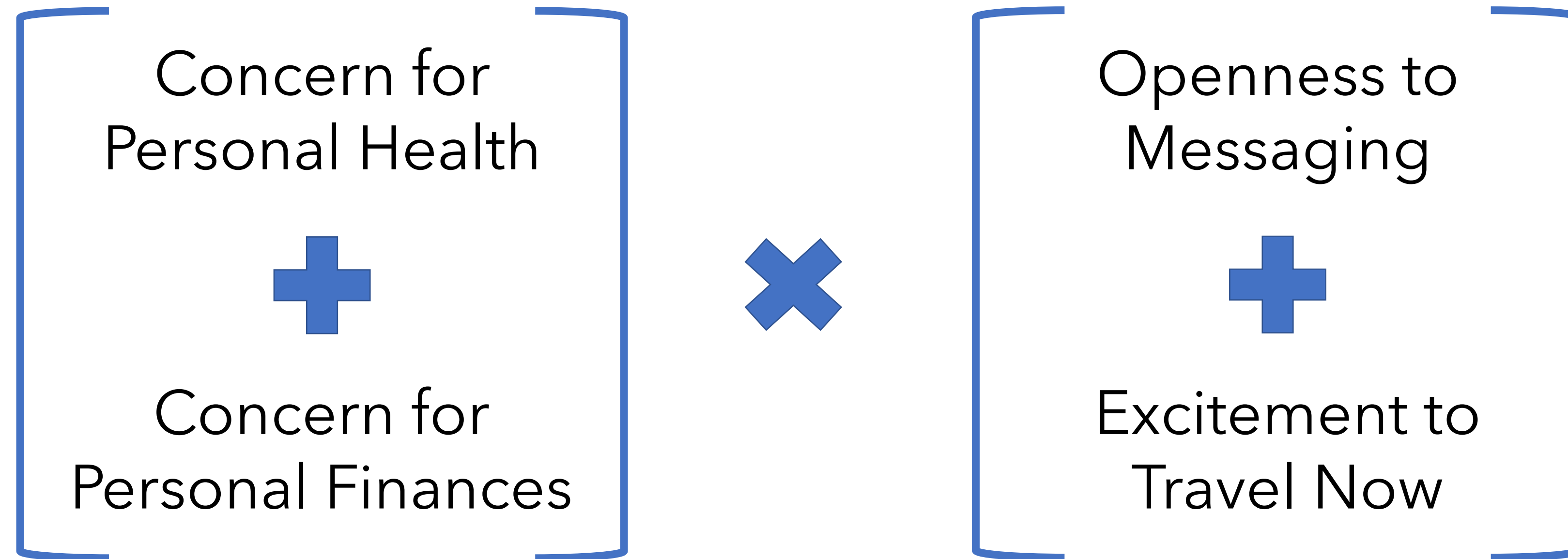
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

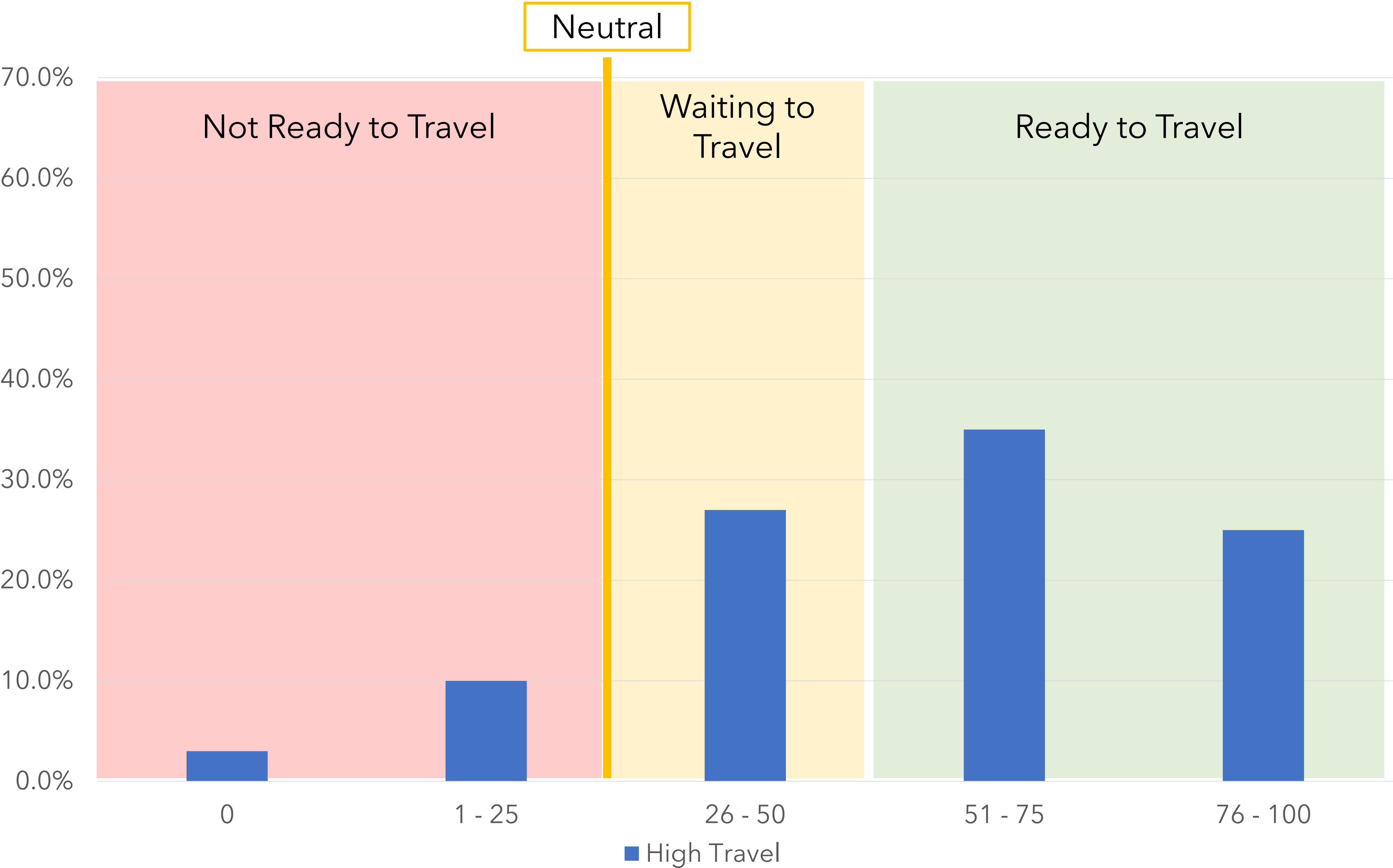
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

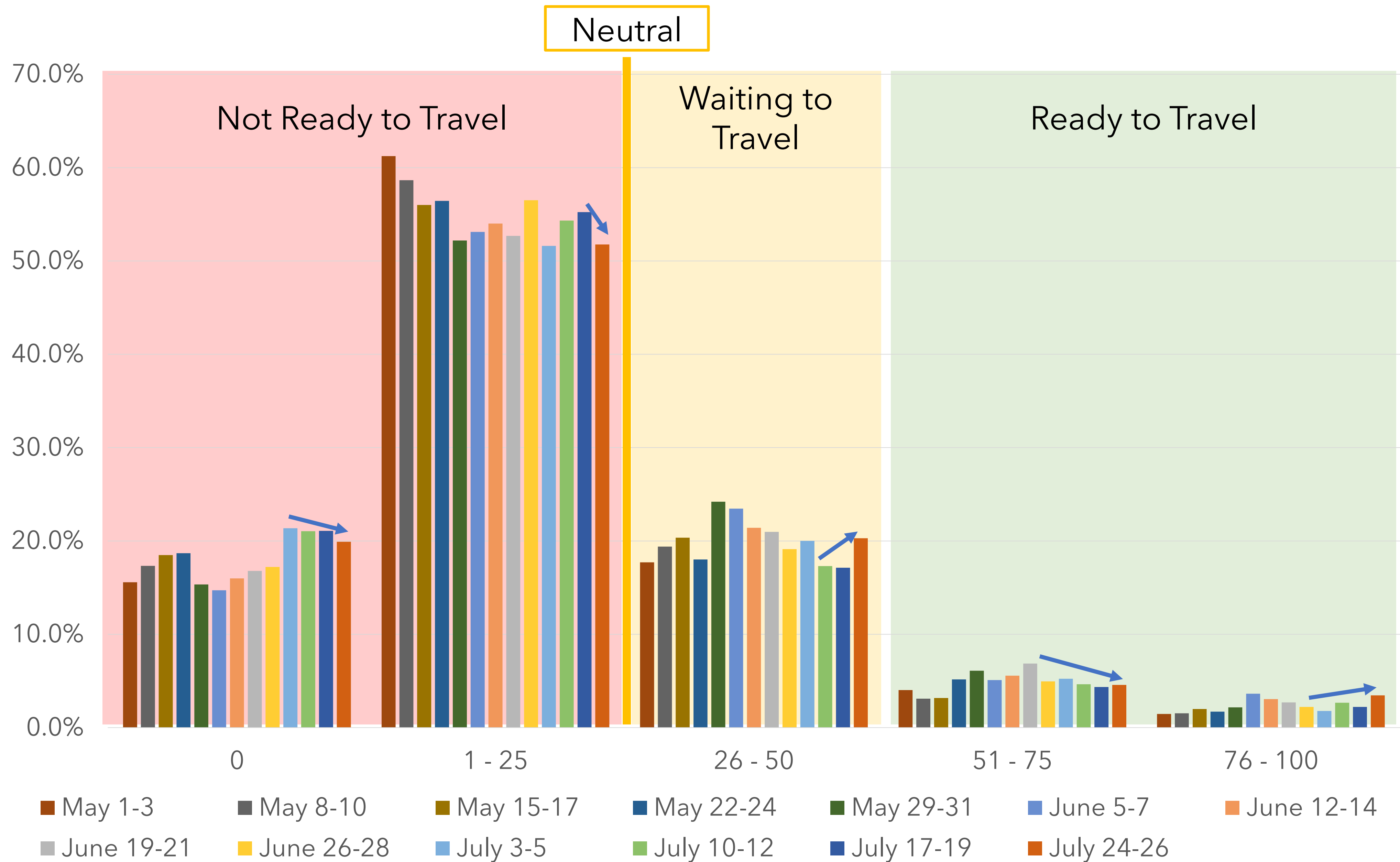


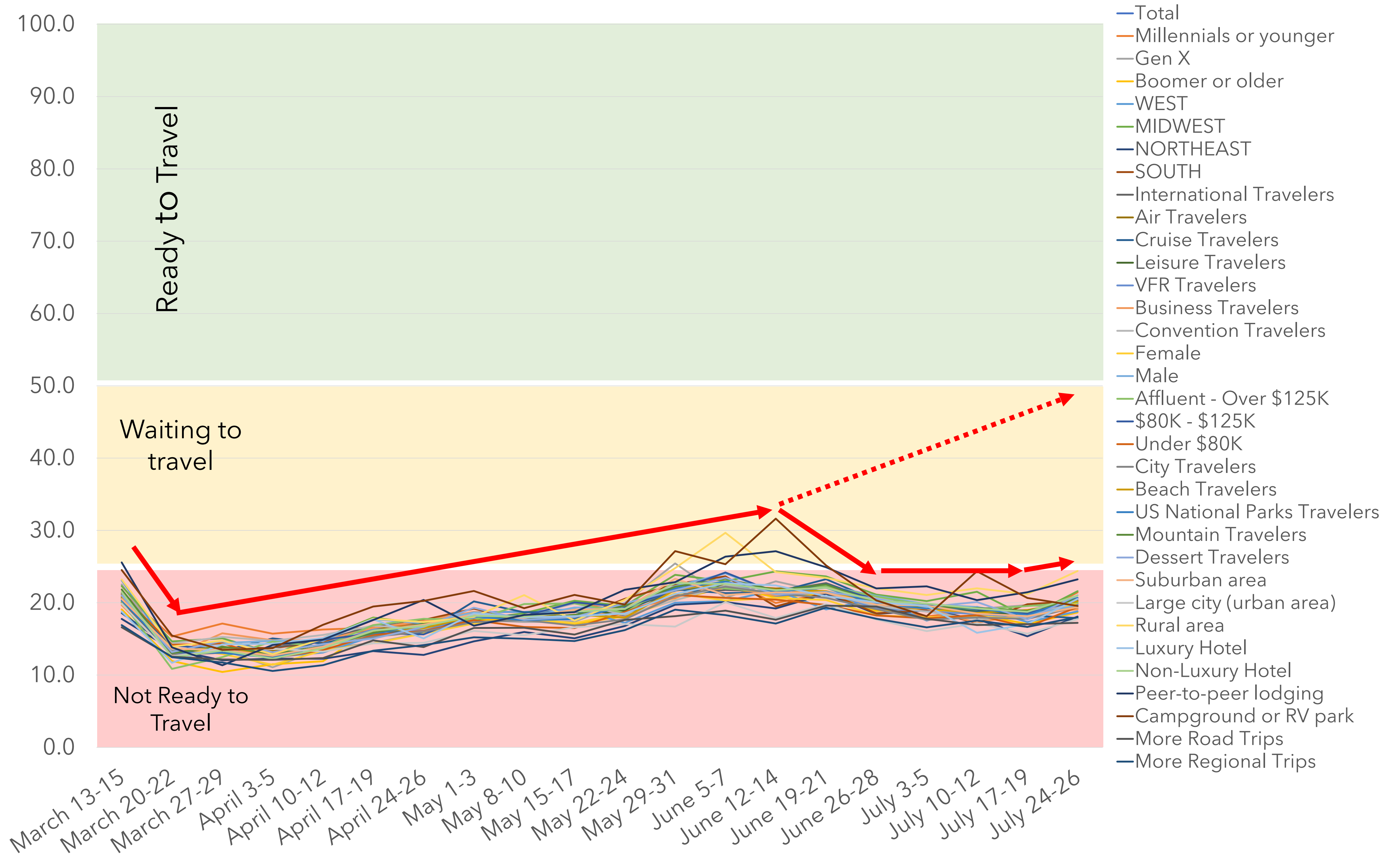
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook

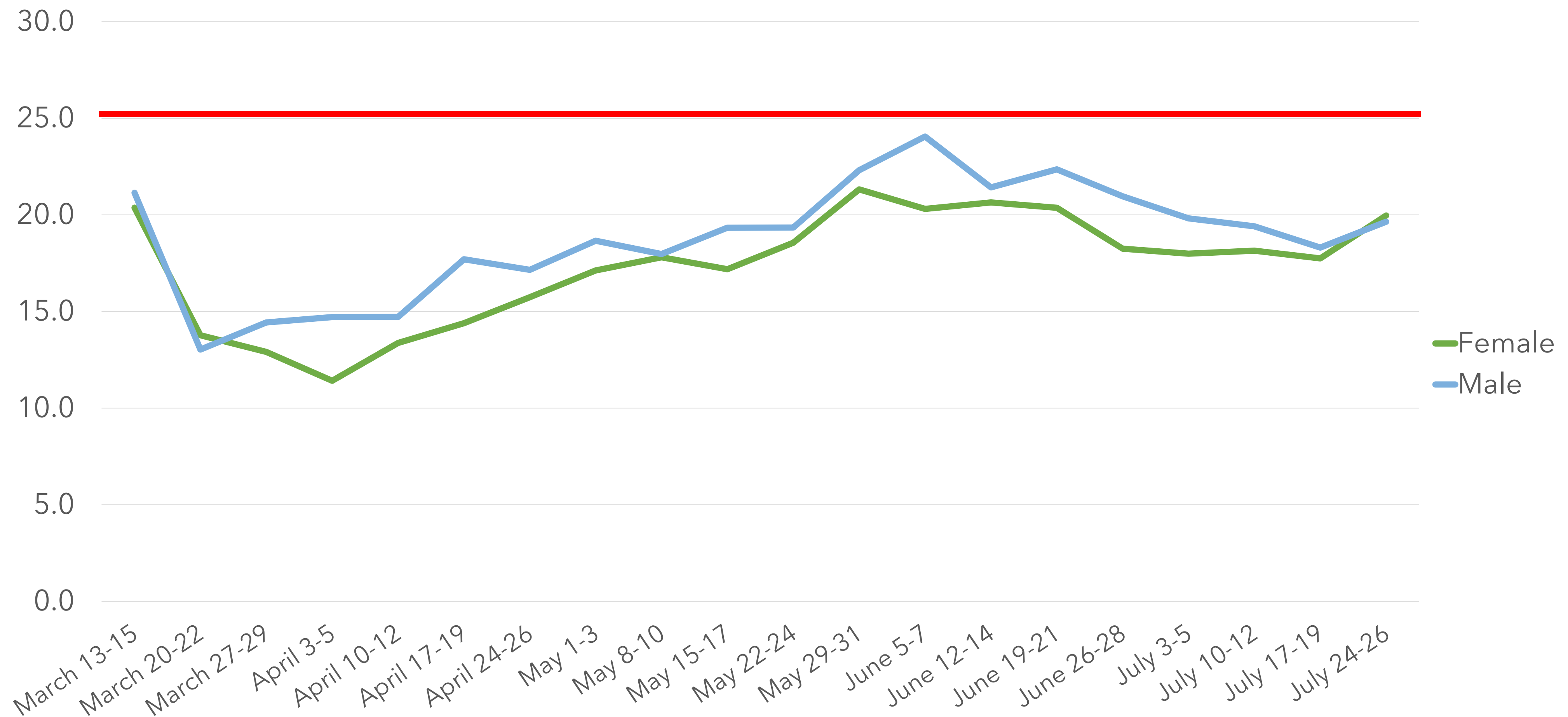




Gender

Points of Interest:

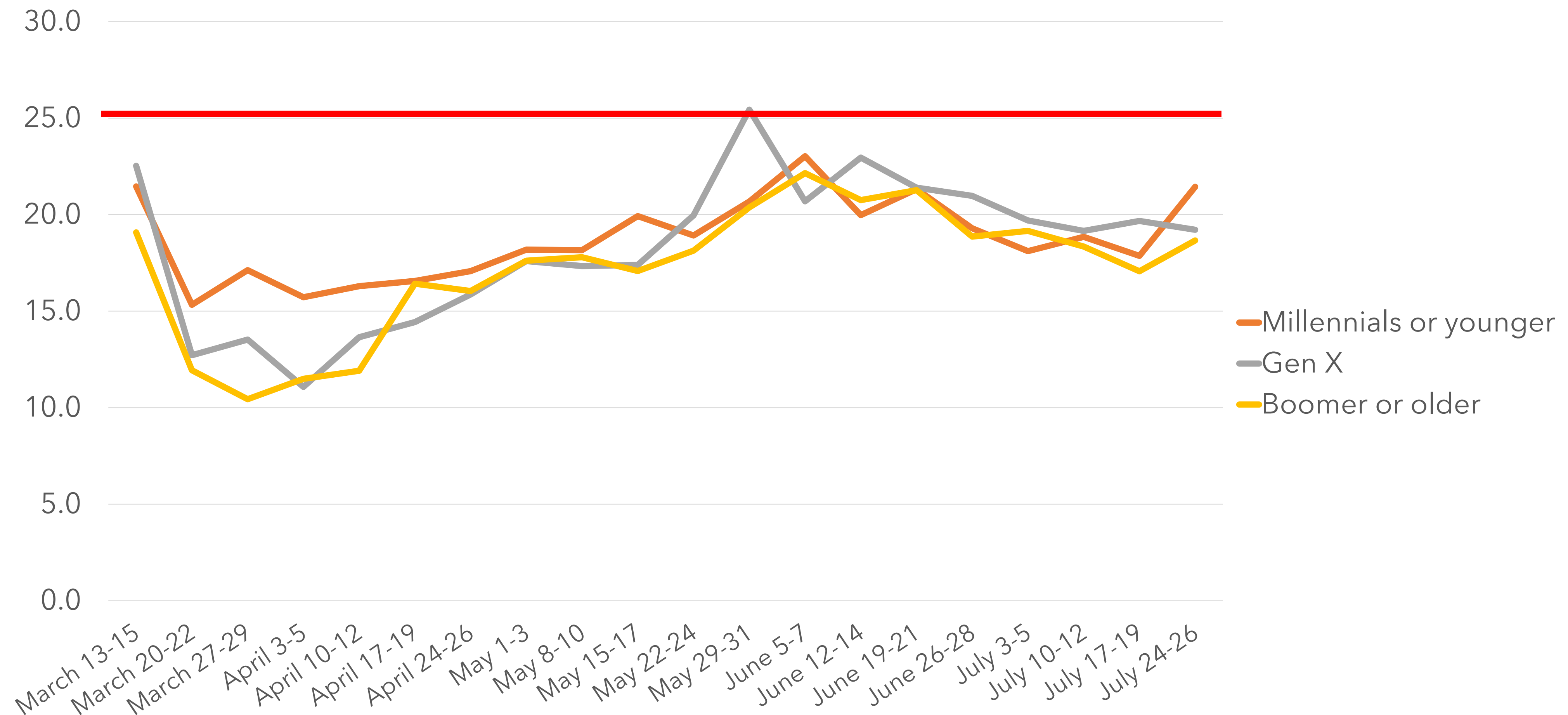
- Both Men and Women show increased sentiment this week.
- Safety concerns showed very little movement for both Men and Women this week.
- This week 47.2 percent of Women reported they have no plans to travel in 2020 (down from 49.3% last week).
- One-in-five Men this week (22.4%) said they are already traveling or ready to travel with no hesitations.



Generation

Points of Interest:

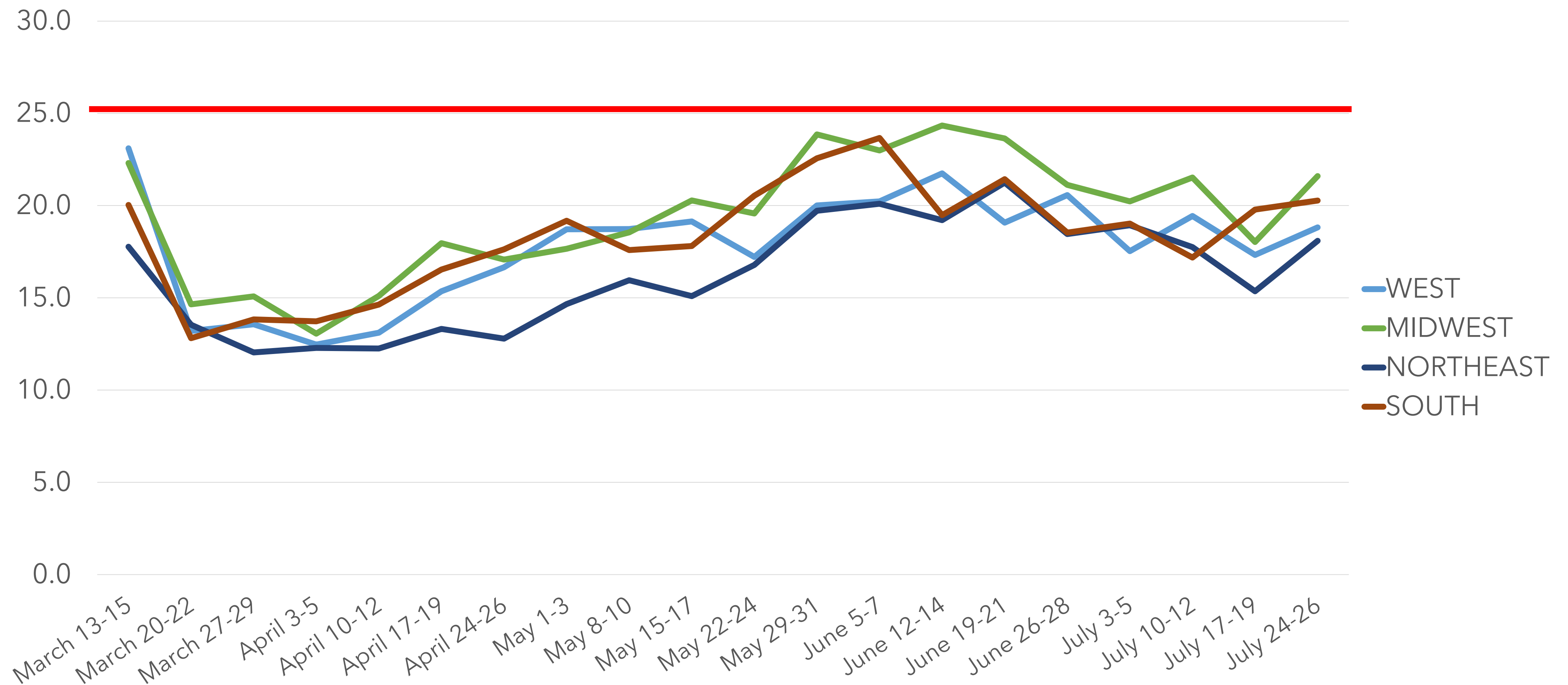
- Millennials indexed higher than the other generations this week, indexing nearly as high as they did in early June.
- Gen X showed a slight increase in safety concerns this week compared to the other generations.
- Over a third of Millennials (35.6%) reported they would be Happy or Very happy to see an ad promoting their community for travel (compared to a quarter or less of Gen X and Boomers).



US Region

Points of Interest:

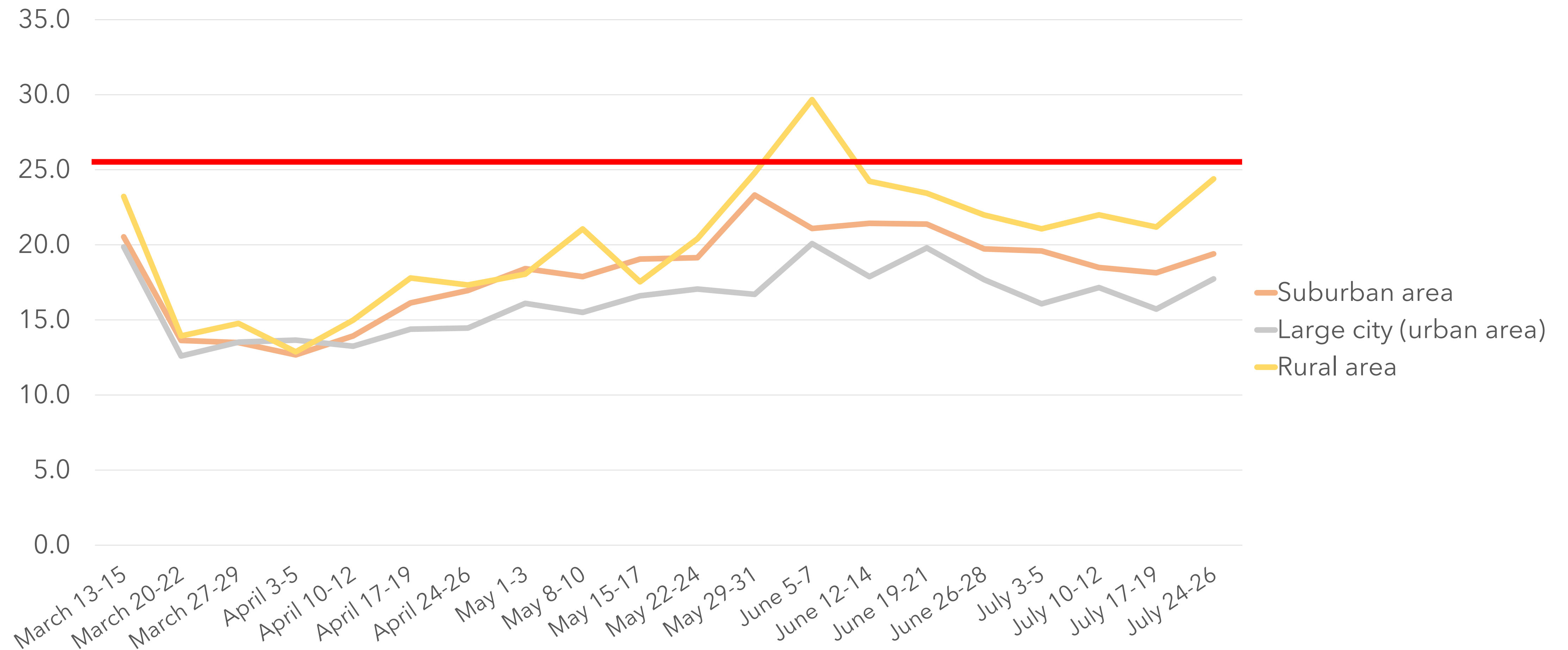
- The Midwest indexed highest amongst US regions this week and all regions are showing at least some sentiment improvement.
- The Midwest and Northeast regions showed slight decrease in safety concerns this week while the other regions showed increases.
- The Midwest and South regions showed more excitement for travel and openness for travel messaging again this week than the other US regions.



Type Of Residence

Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural respondents reported decreased safety concerns this week.



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



15-minute presentations for your board and stakeholders

info@destinationanalysts.com



We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

info@destinationanalysts.com

