



# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

PRESENTATION OF FINDINGS  
WEEK OF JULY 12<sup>TH</sup>, 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.



# 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 18 data (fielded July 10-12) 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.

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

**Webinar recording  
available on our website:**

[DestinationAnalysts.com/covid-webinars](https://DestinationAnalysts.com/covid-webinars)







BUSINESS NEWS JULY 10, 2020 / 11:28 AM / UPDATED 8 HOURS AGO

## U.S. sets record for new COVID cases third day in a row at over 69,000

Lisa Shumaker

5 MIN READ



(Reuters) - New cases of COVID-19 rose by over 69,000 across the United States on Friday, according to a Reuters tally, setting a record for the third consecutive day as Walt Disney Co stuck to its plans to reopen its flagship theme park in hard-hit Florida.

A total of nine U.S. states - Alaska, Georgia, Idaho, Iowa, Louisiana, Montana, Ohio, Utah and Wisconsin - also reached records for single-day infections.



## Cases in the U.S.

Other Languages ▾

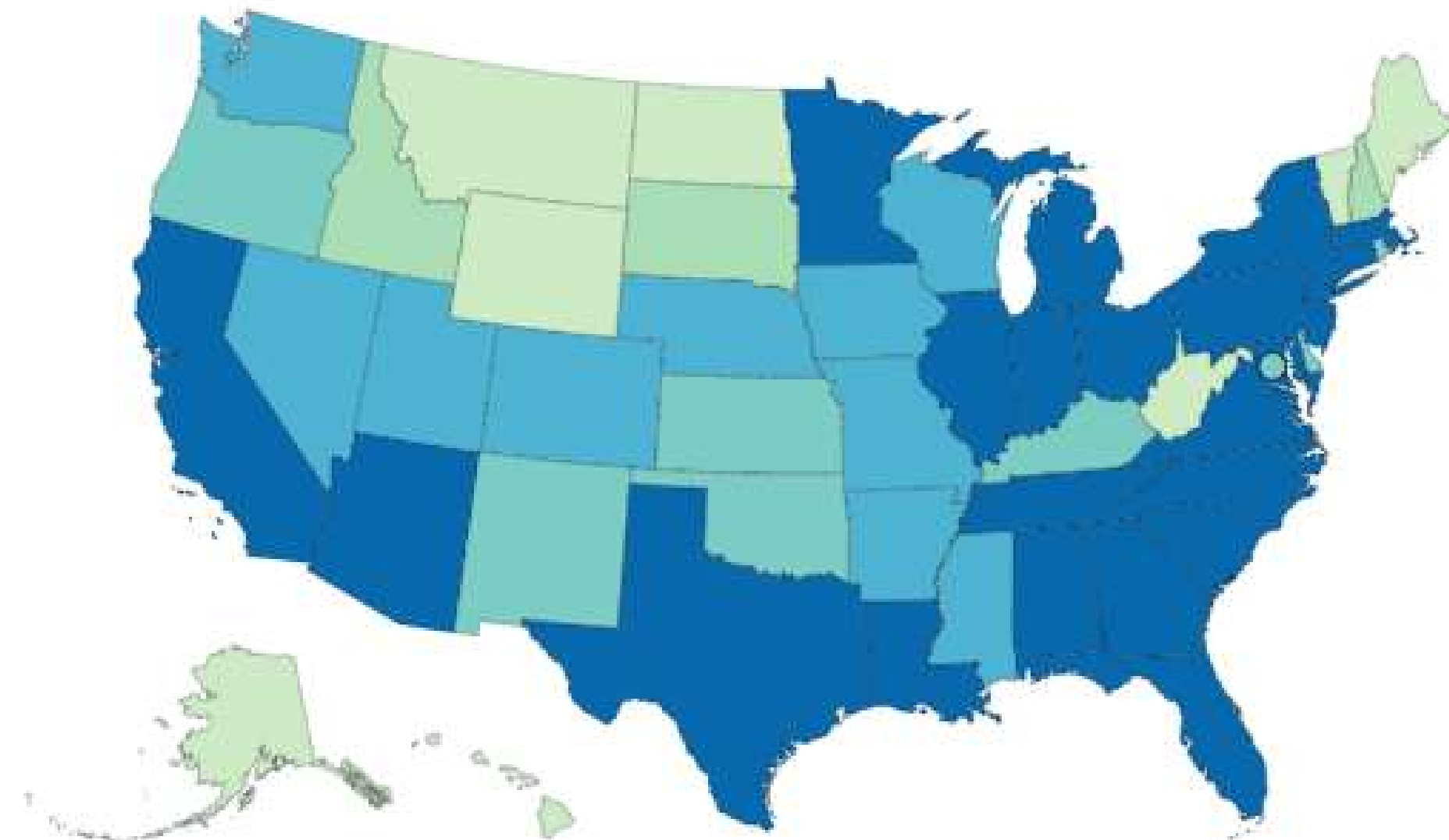
Print Page

TOTAL CASES  
**3,106,931**  
59,260 New Cases\*

TOTAL DEATHS  
**132,855**  
799 New Deaths\*

\*Compared to yesterday's data

[About the Data](#)





ENTERTAINMENT MEDIA & BOOKS

# Disney reopened Downtown Disney at Disneyland this week, drawing crowds instantly

Downtown Disney saw little pockets of crowds when it reopened Thursday

By Herb Scribner | @HerbScribner | Jul 10, 2020, 2:58pm MDT

f t SHARE



Downtown Disney District at the Disneyland Resort is a fresh, one-of-a-kind Disney experience, immersing guests by day and night in an exciting mix of family-friendly dining, shopping and more. | Joshua Sudock, Disney Parks

AD

THEME PARKS

# Opening day at Disney World: Small crowds, short lines, social distancing and COVID-19 merch

Curtis Tate and Britt Kennerly USA TODAY

Published 7:30 a.m. ET Jul. 11, 2020 | Updated 6:06 p.m. ET Jul. 11, 2020

f t



## Walt Disney World reopens to the public after coronavirus closure

Walt Disney World has reopened to the public but with many new precautions to help prevent the spread of COVID-19. USA TODAY, Wochit



# 'Devastated': As Layoffs Keep Coming, Hopes Fade That Jobs Will Return Quickly

July 9, 2020 · 5:00 AM ET  
Heard on Morning Edition

 SCOTT HORSLEY 

 **3-Minute Listen**

[+ PLAYLIST](#)   



United Airlines says it plans to furlough up to 36,000 employees as the pandemic continues to batter the travel industry and much of the economy.  
*Justin Sullivan/Getty Images*

Updated at 8:44 a.m. ET

From airlines to paper mills, the job news is grim, and there are growing signs it won't be getting better anytime soon. On Thursday, the Labor Department reported [nearly 2.4 million new applications for state and federal unemployment benefits](#) last week.

And United Airlines is warning that it may have to furlough as many as [36,000 employees](#) this fall. Demand for air travel has collapsed as a result of the coronavirus pandemic.

The president of the flight attendants union called the warning a "gut punch" but also "the most honest assessment we've seen on the state of the industry — and our entire economy."

Union President Sara Nelson [tweeted](#) that demand for air travel had recovered a small fraction of its pre-pandemic levels this summer and "even those minimal gains evaporated over the last week due to surging COVID-19 cases across the country."

SPEND

## 32% of U.S. households missed their July housing payments

Published Wed, Jul 8 2020 12:11 PM EDT • Updated Thu, Jul 9 2020 11:18 AM EDT

 Alicia Adamczyk  
[@ALICIAADAMCZYK](#)

Share    



## Covid-19 Is Bankrupting American Companies at a Relentless Pace

By [Davide Scigliuzzo](#), [Josh Saul](#),  
[Shannon D. Harrington](#) and [Demetrios Pogkas](#)  
Published: July 9, 2020 | Updated: July 10, 2020

[Tracking Covid-19](#) [Global Cases](#) [Cases in the U.S.](#) [U.S. State Projections](#) [U.S. Recovery](#)

Retailers, airlines, restaurants. But also sports leagues, a cannabis company and an archdiocese plagued by sex-abuse allegations. These are some of the more than 110 companies that declared bankruptcy in the U.S. this year and blamed Covid-19 in part for their demise.

Many were in deep financial trouble even before governors ordered non-essential businesses shut to help contain the spread of the virus. Most will reorganize and emerge from court smaller and less-indebted. The hardest hit, however, are selling off assets and closing for good.

They include plenty of big, iconic names. [Hertz](#) and [J.C. Penney](#) and now [Brooks Brothers](#), too. The vast bulk, though, are small and medium-sized businesses scattered across the country. Their downfall might not normally garner much attention, but it does underscore the full extent of the damage Covid-19 has inflicted on the economy.

## THE WALL STREET JOURNAL.

[CATCHING COVID-19](#) [GOING OUTSIDE SAFELY](#) [SUMMER CHILD CARE](#) [CAN I TRAVEL?](#) [MONEY ADVICE](#)

ECONOMY | [U.S. ECONOMY](#)

## WSJ Survey: Strong U.S. Recovery Depends on Effective Covid-19 Response

Economists' forecasts for growth, unemployment rate improve from previous month's survey







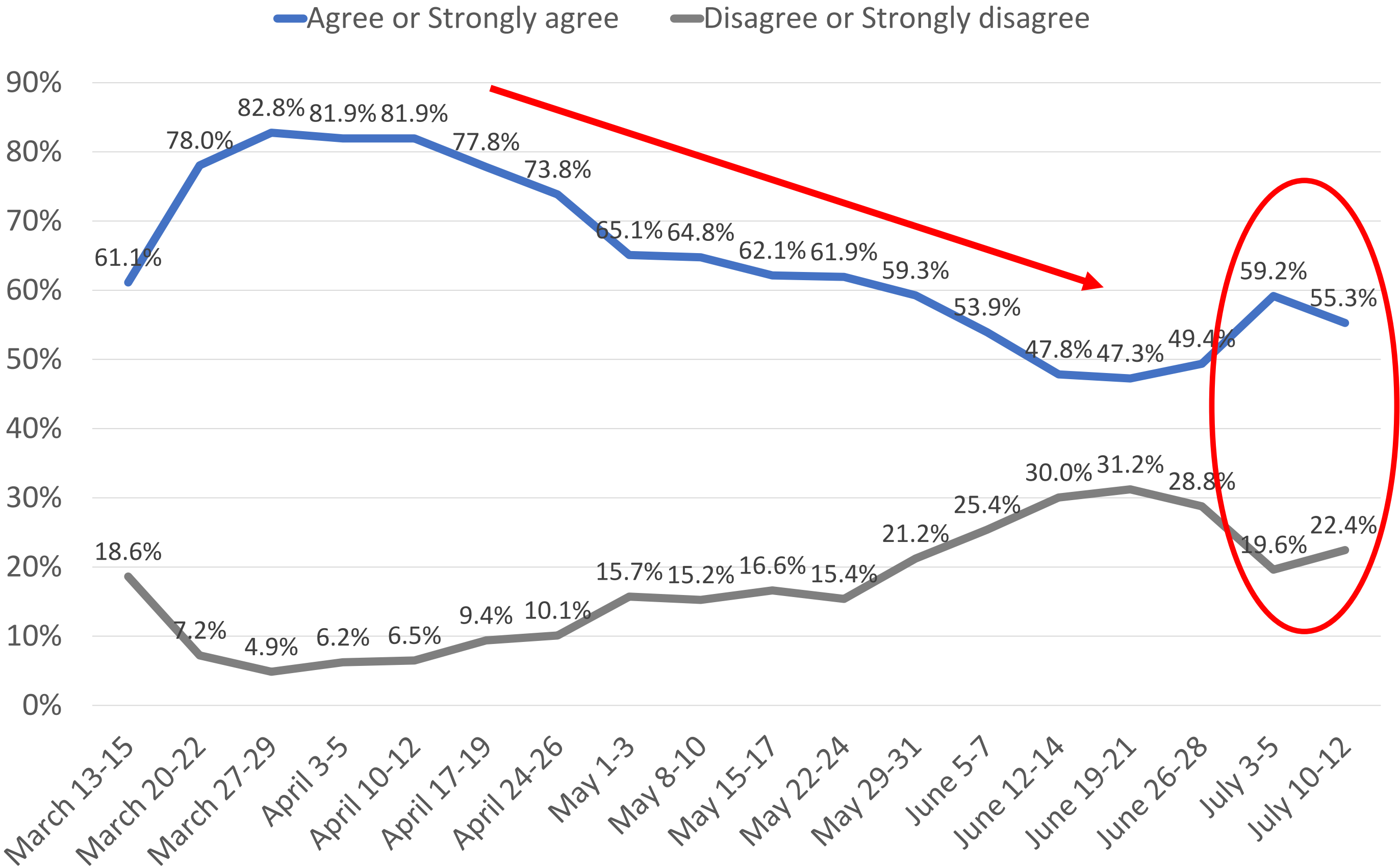
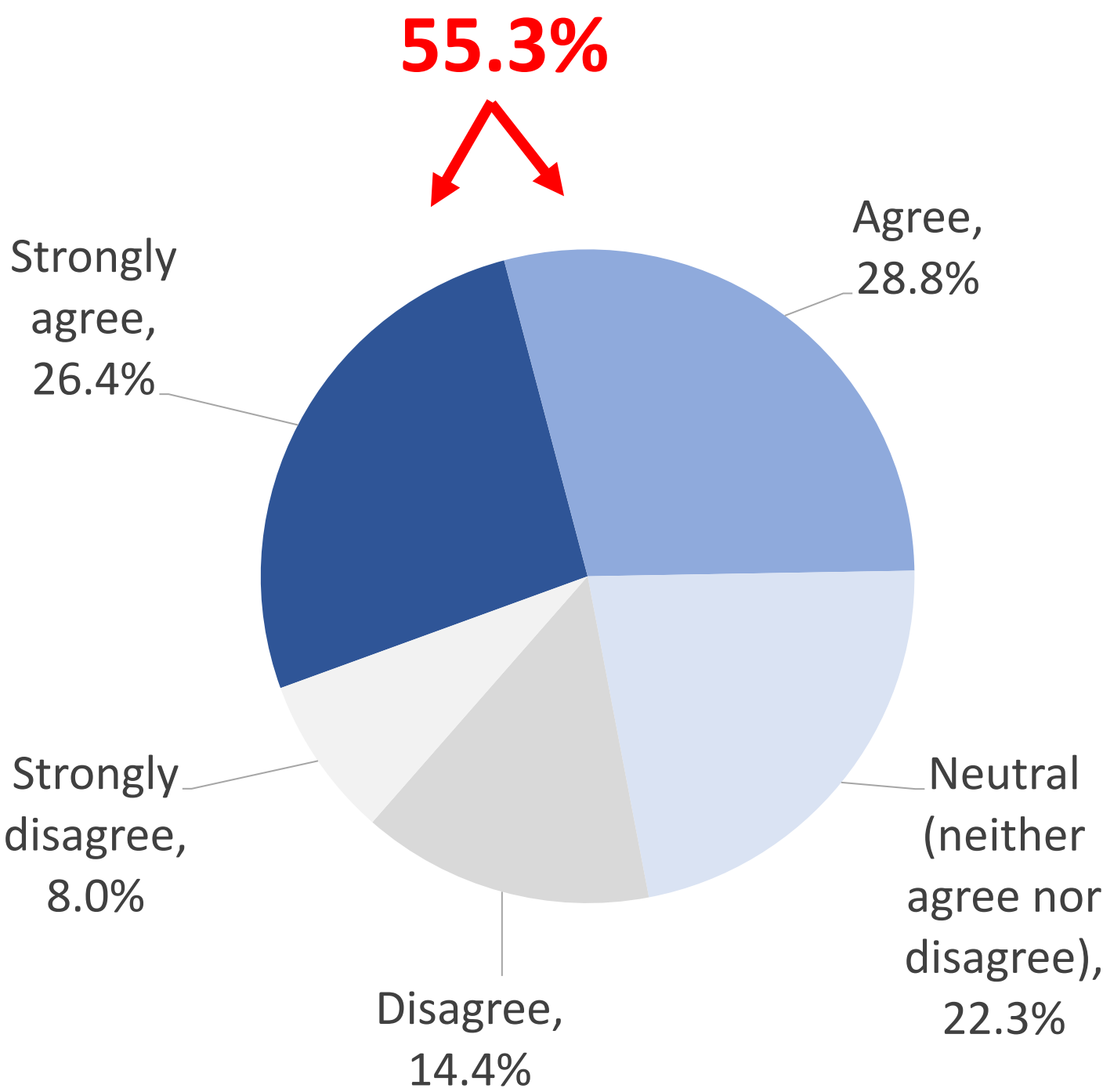
**How We Feel About Travel Now**



# 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.

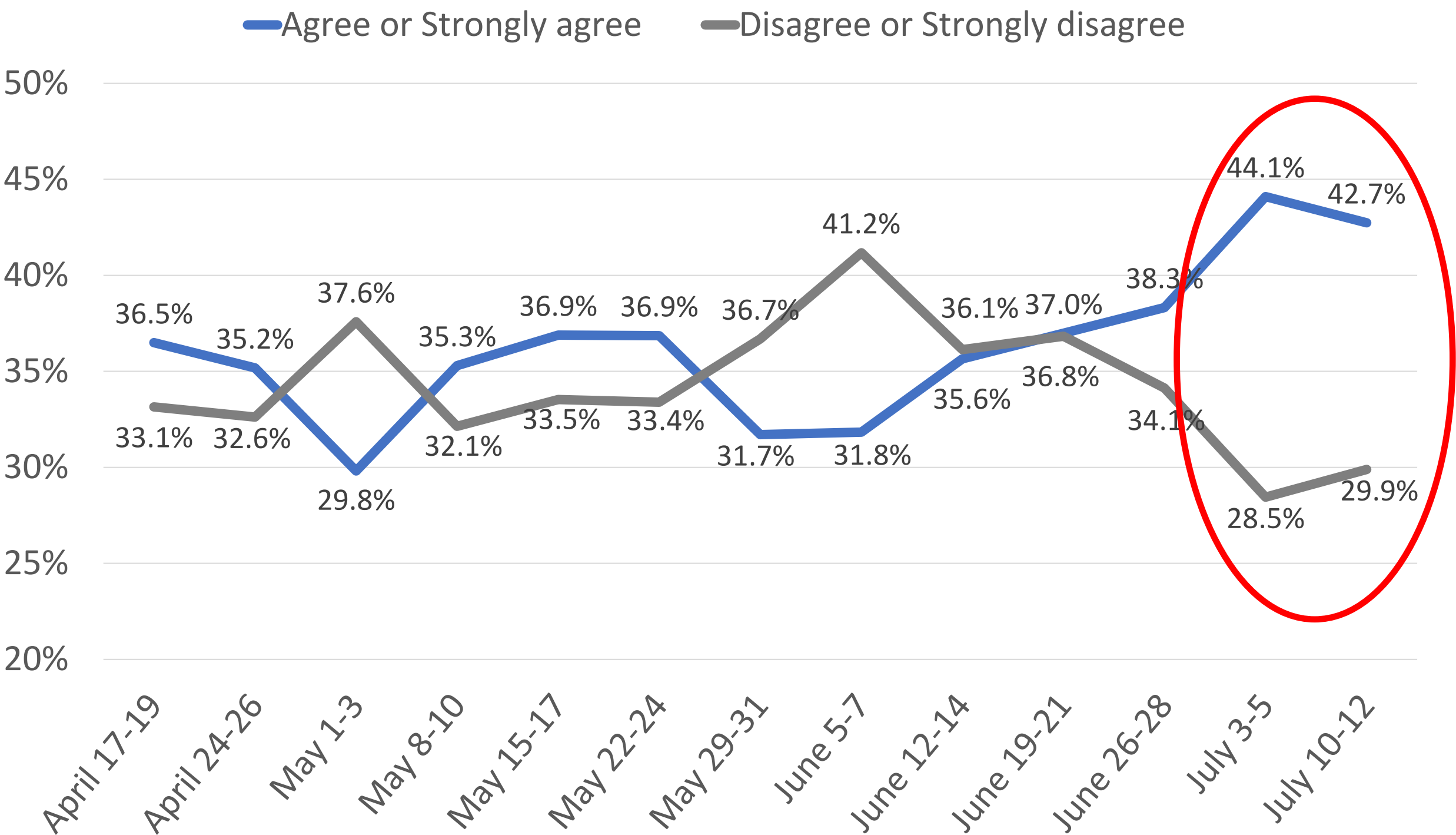
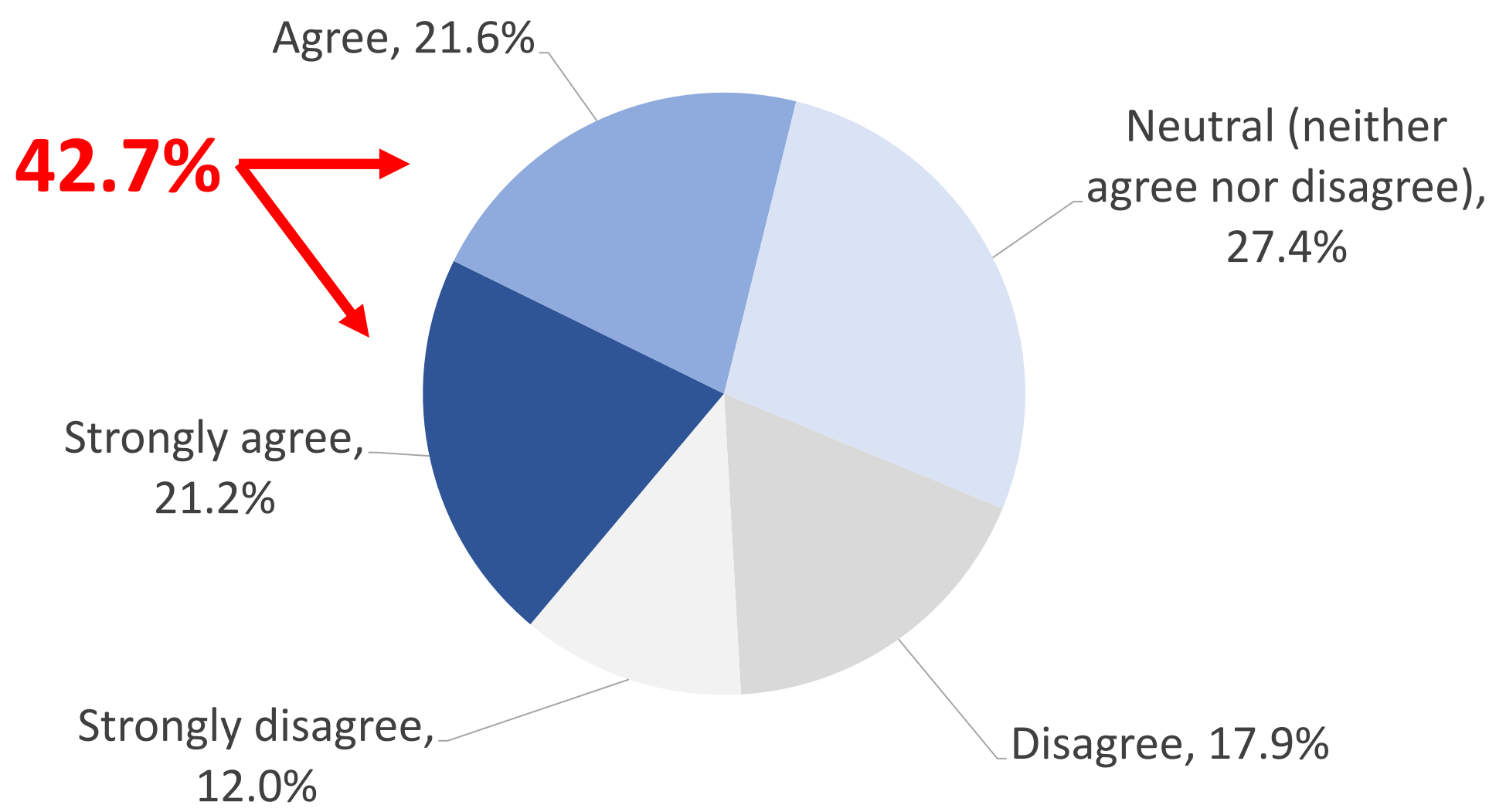




# Won't Travel Without Vaccine

How much do you agree with the following statement?

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



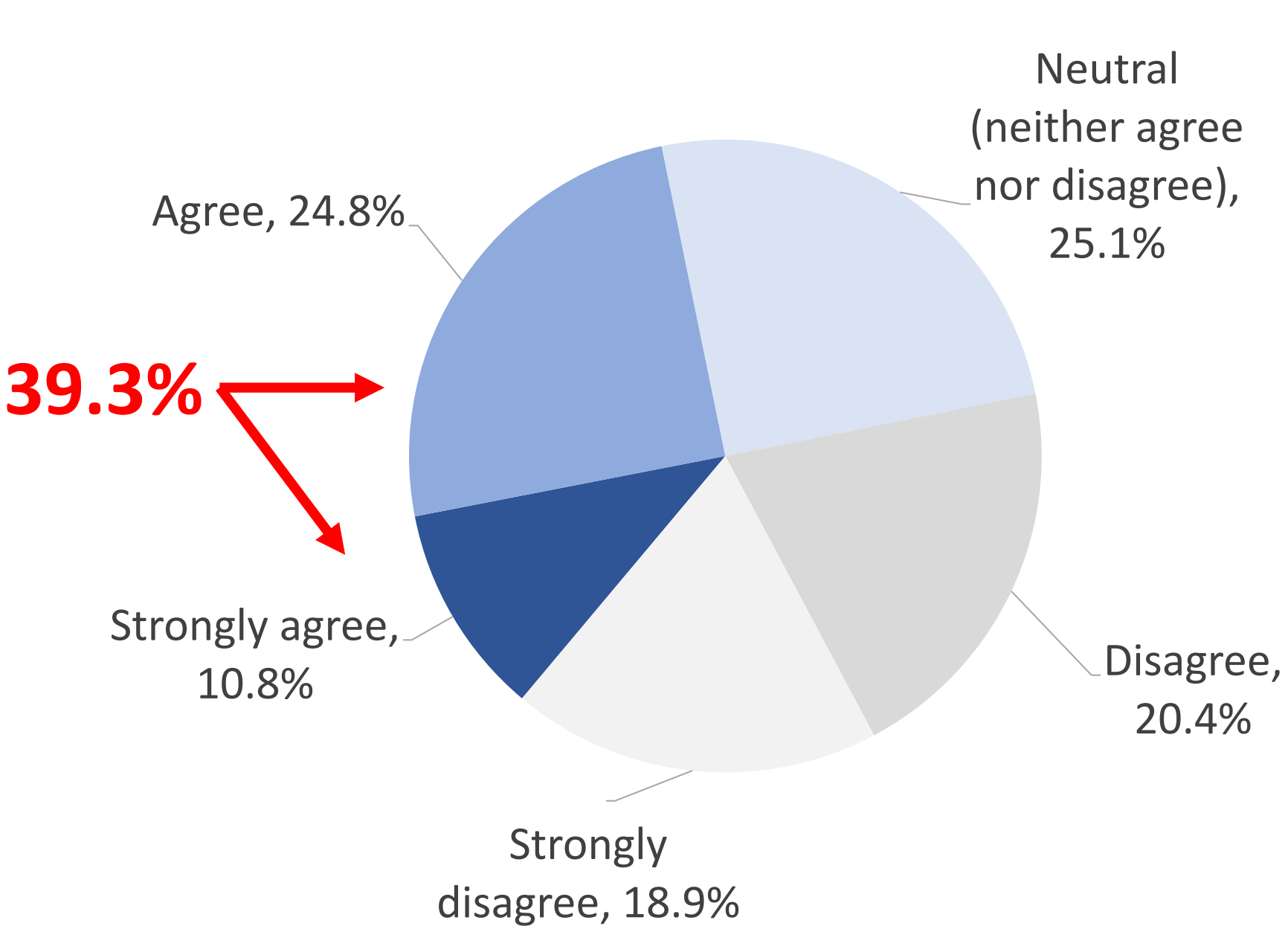
(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 , July 3-5 and 10-12, 2020)



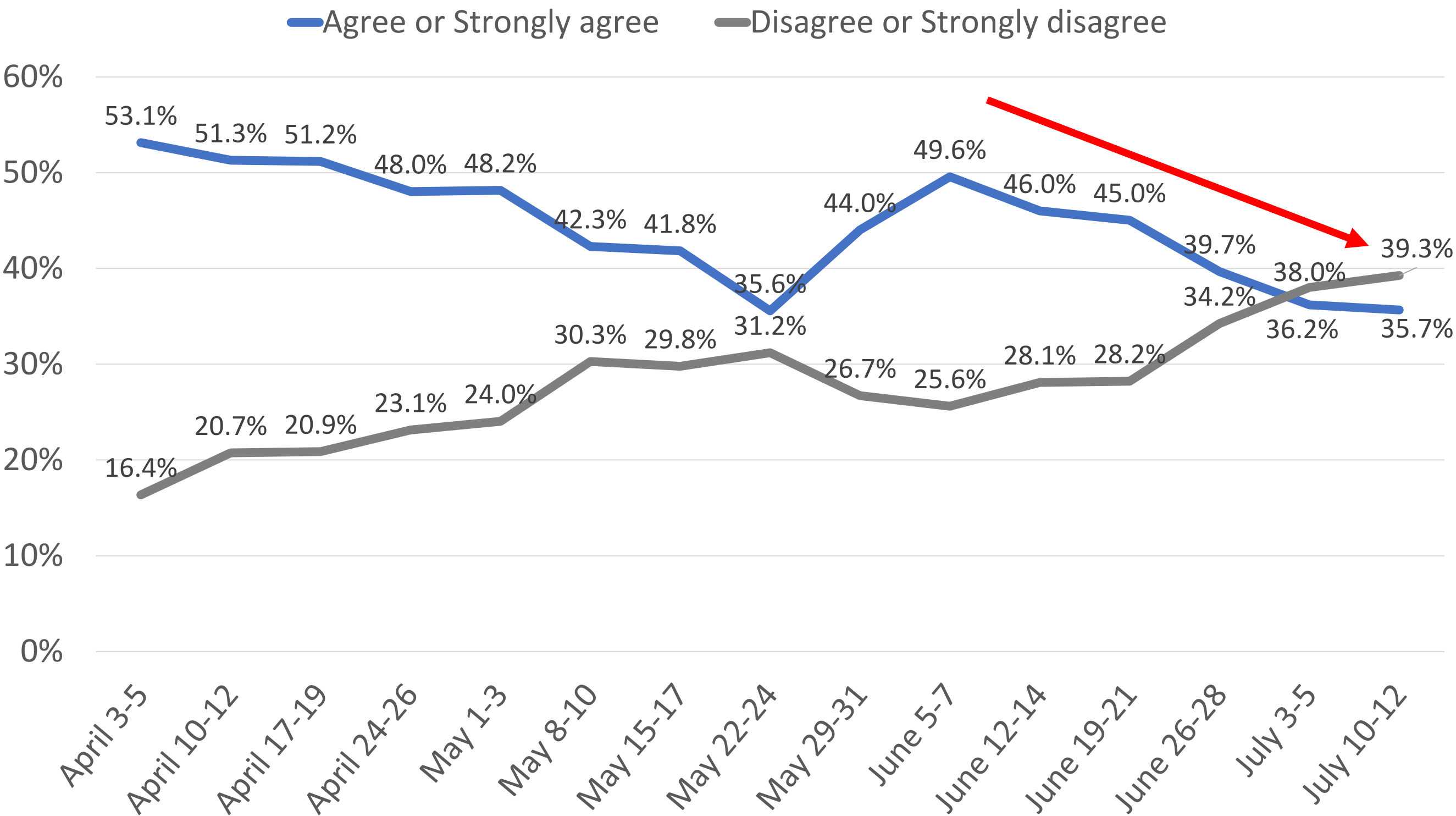
# Expectations for Traveling in the Fall

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, 1,201, 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 and 1,213 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 and 10-12, 2020)

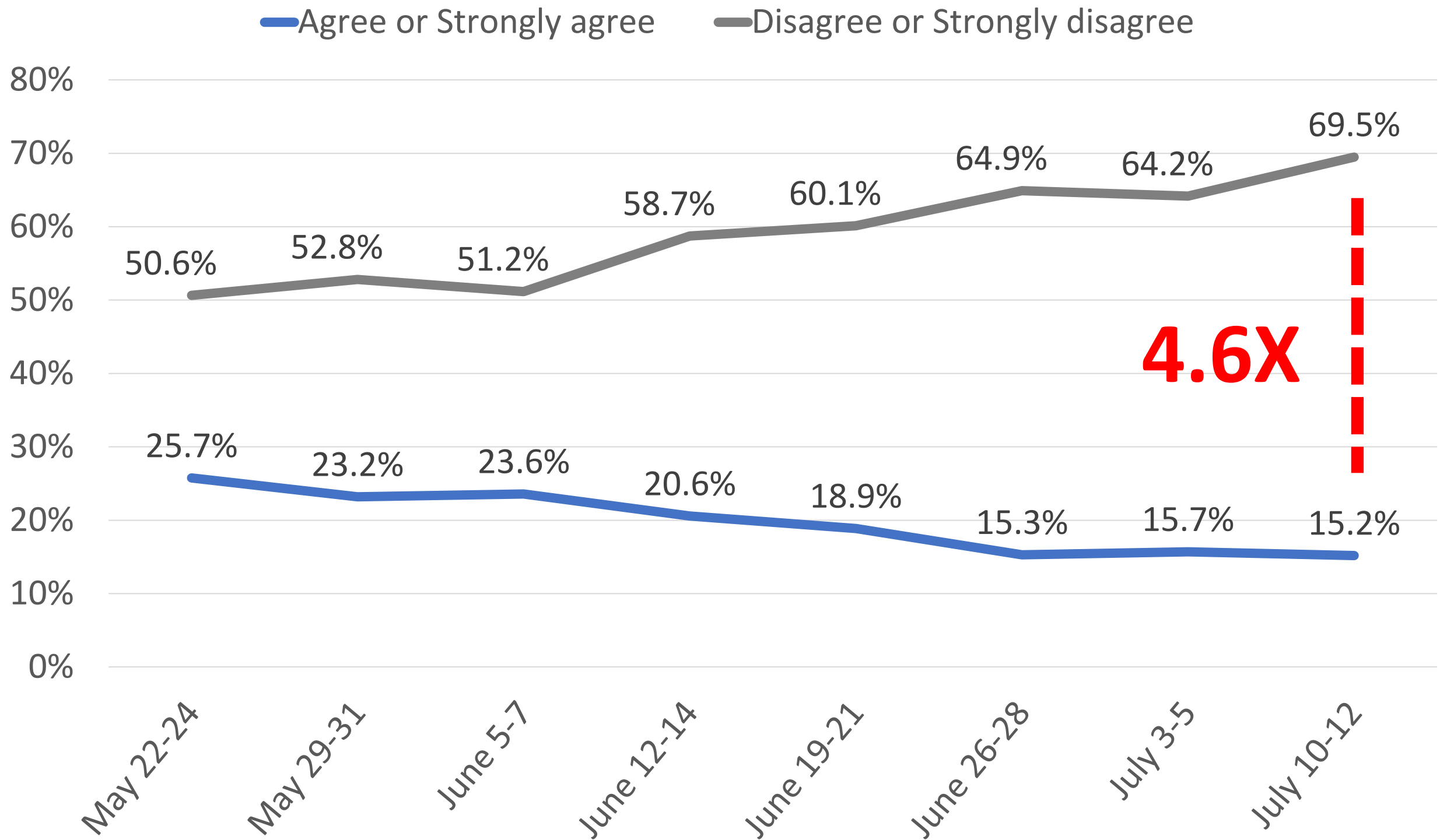
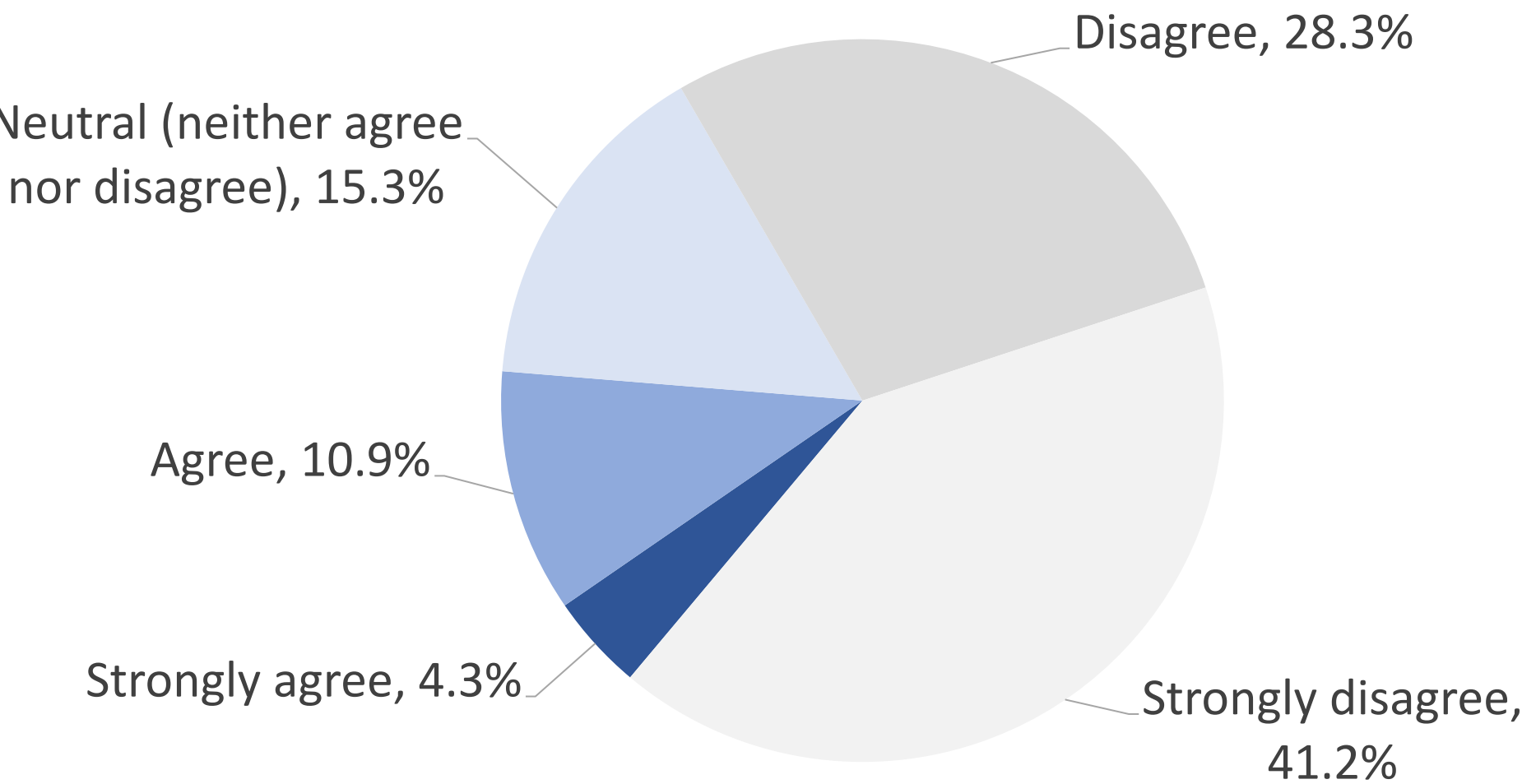




# Expectations for Fall Travel Season

How much do you agree with the following statement?

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



(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)



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

In the next month the coronavirus situation will

\_\_\_\_\_



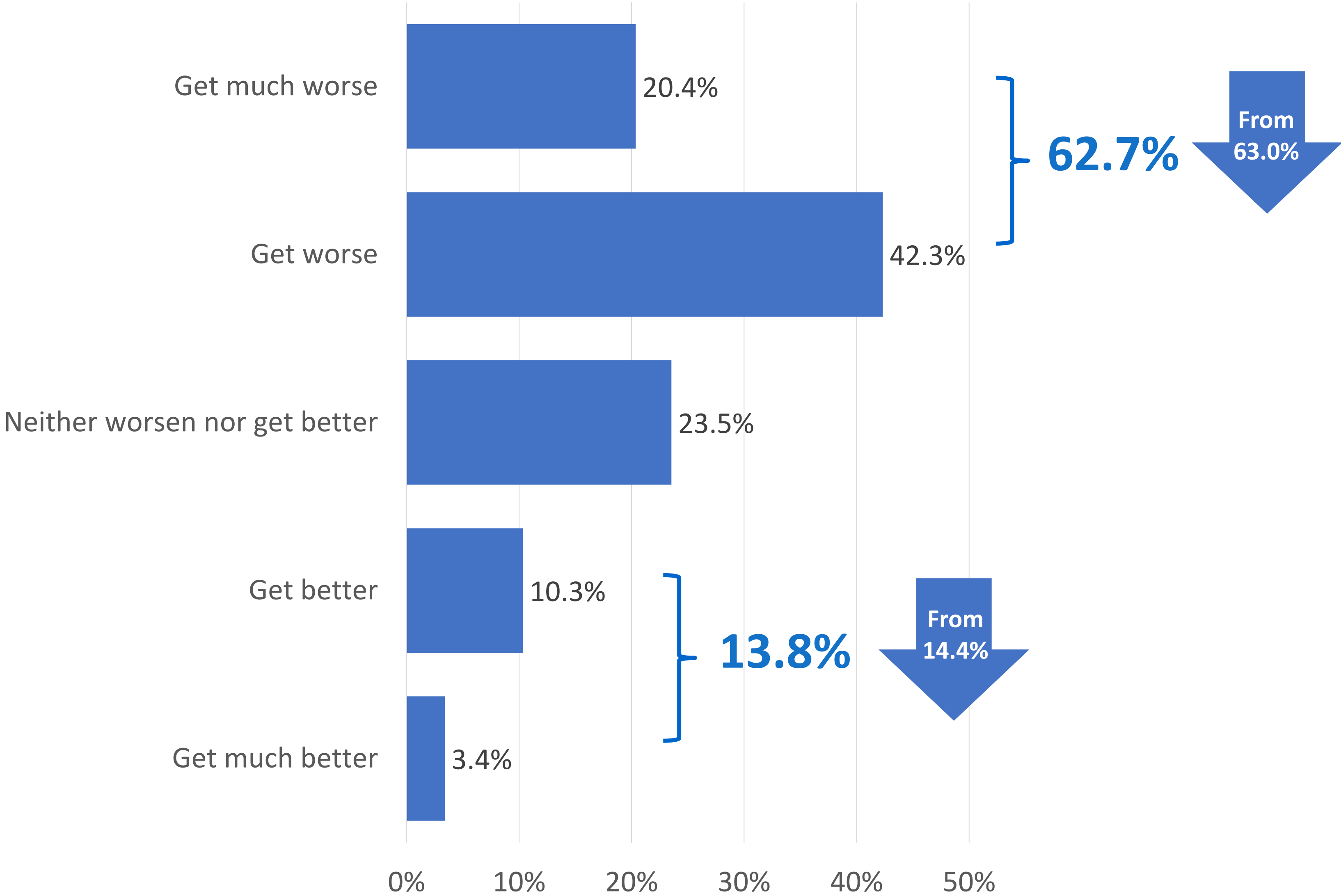


# Expectations for the Coronavirus Outbreak

**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)

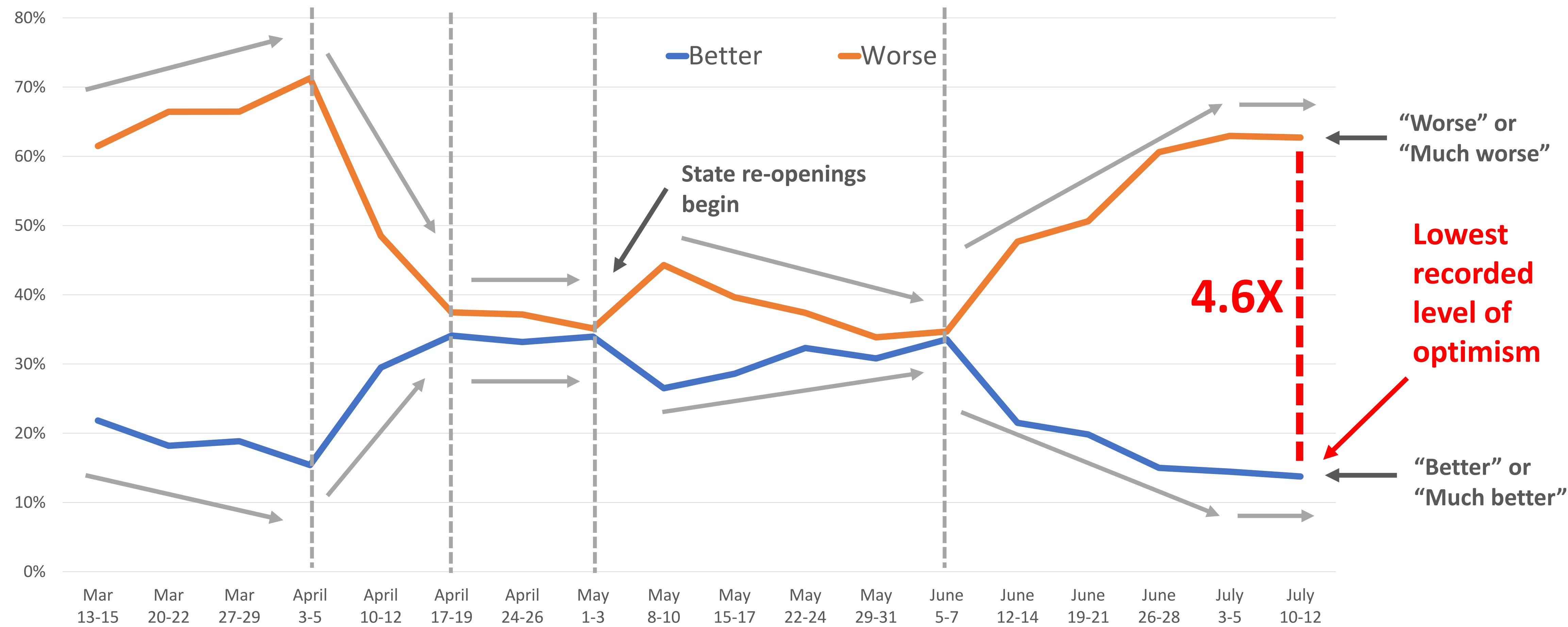
In the next month the coronavirus situation will \_\_\_\_\_

*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*





# Expectations for the Coronavirus Outbreak

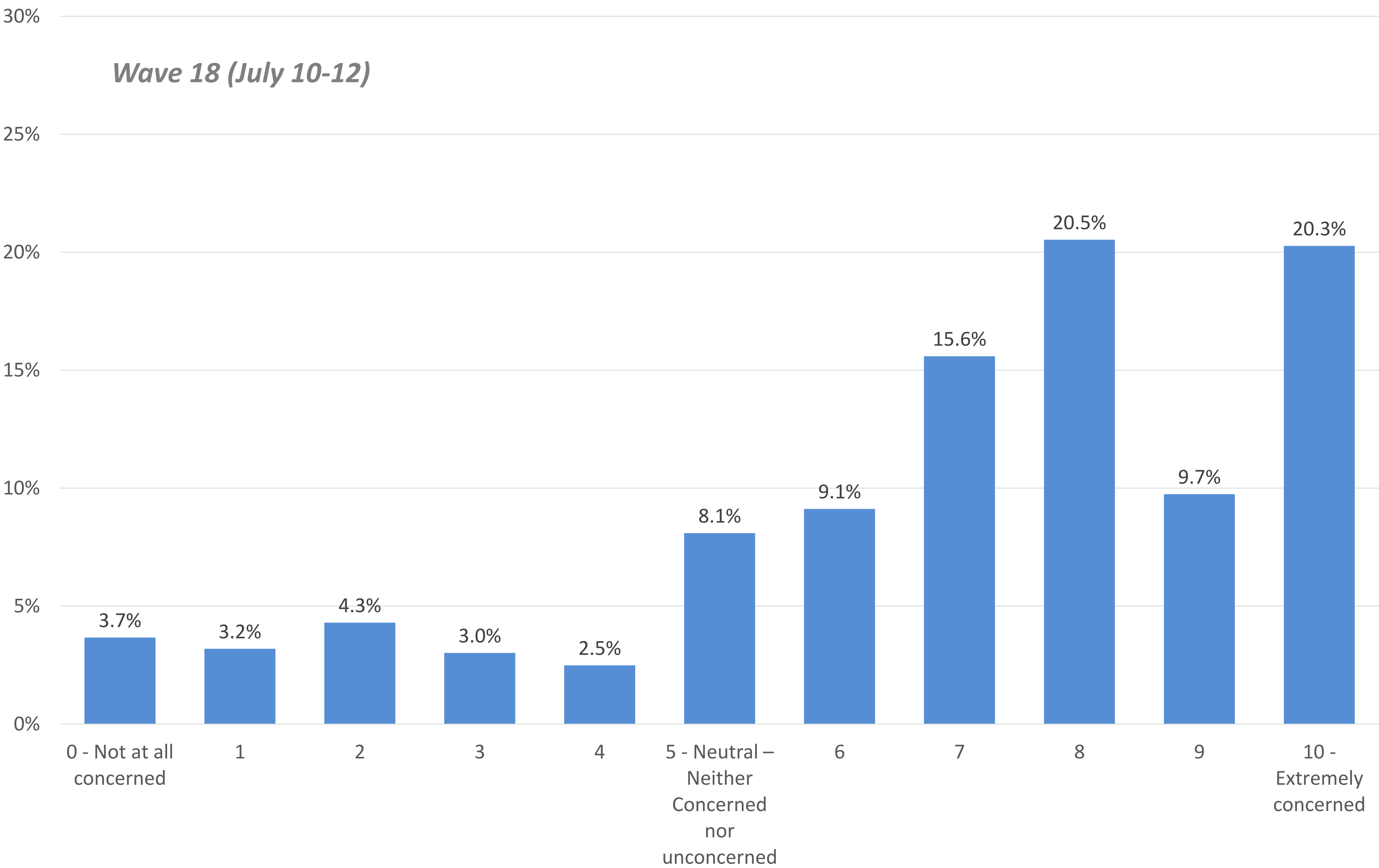




# Personal Health Concerns

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

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

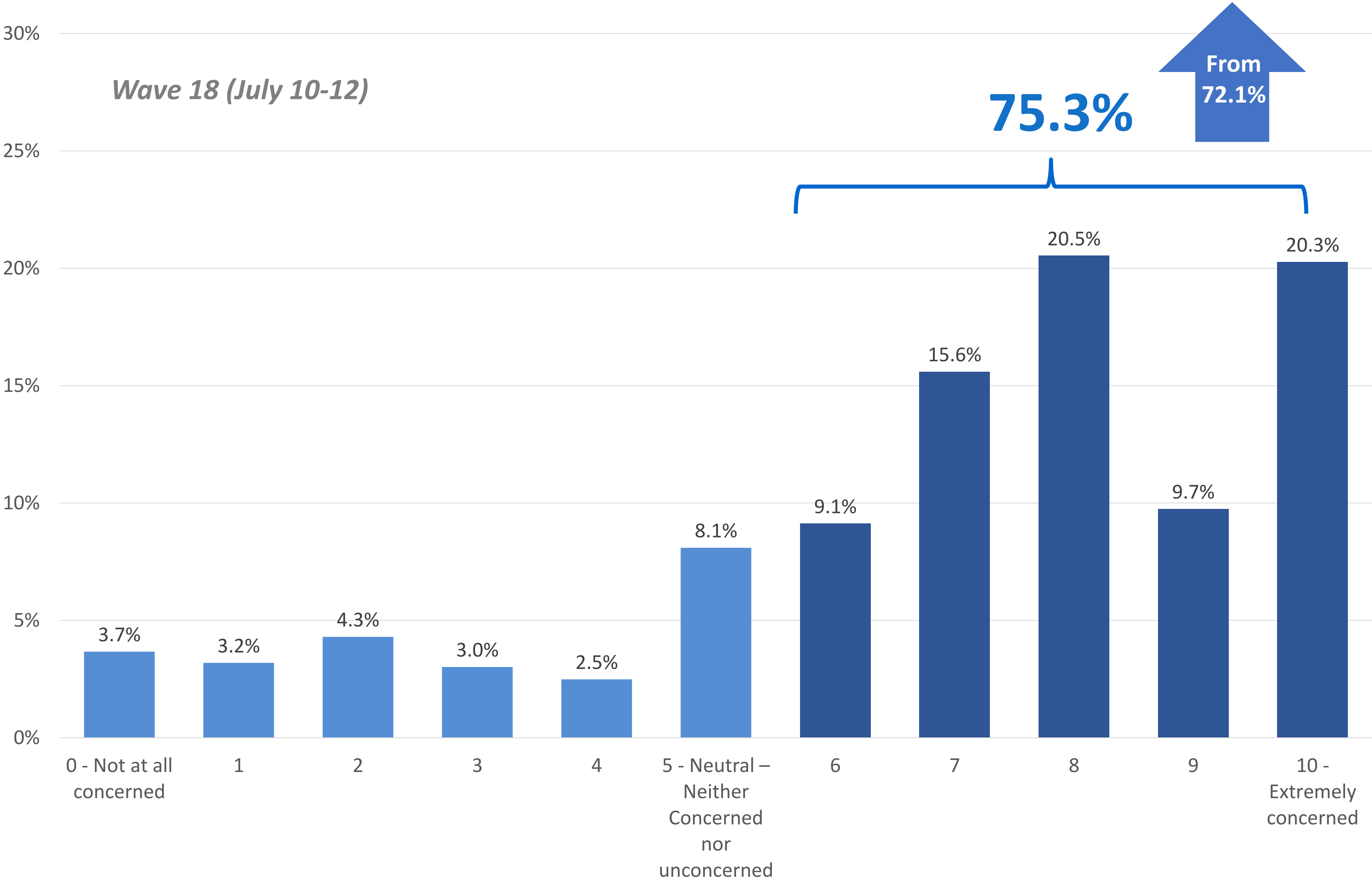




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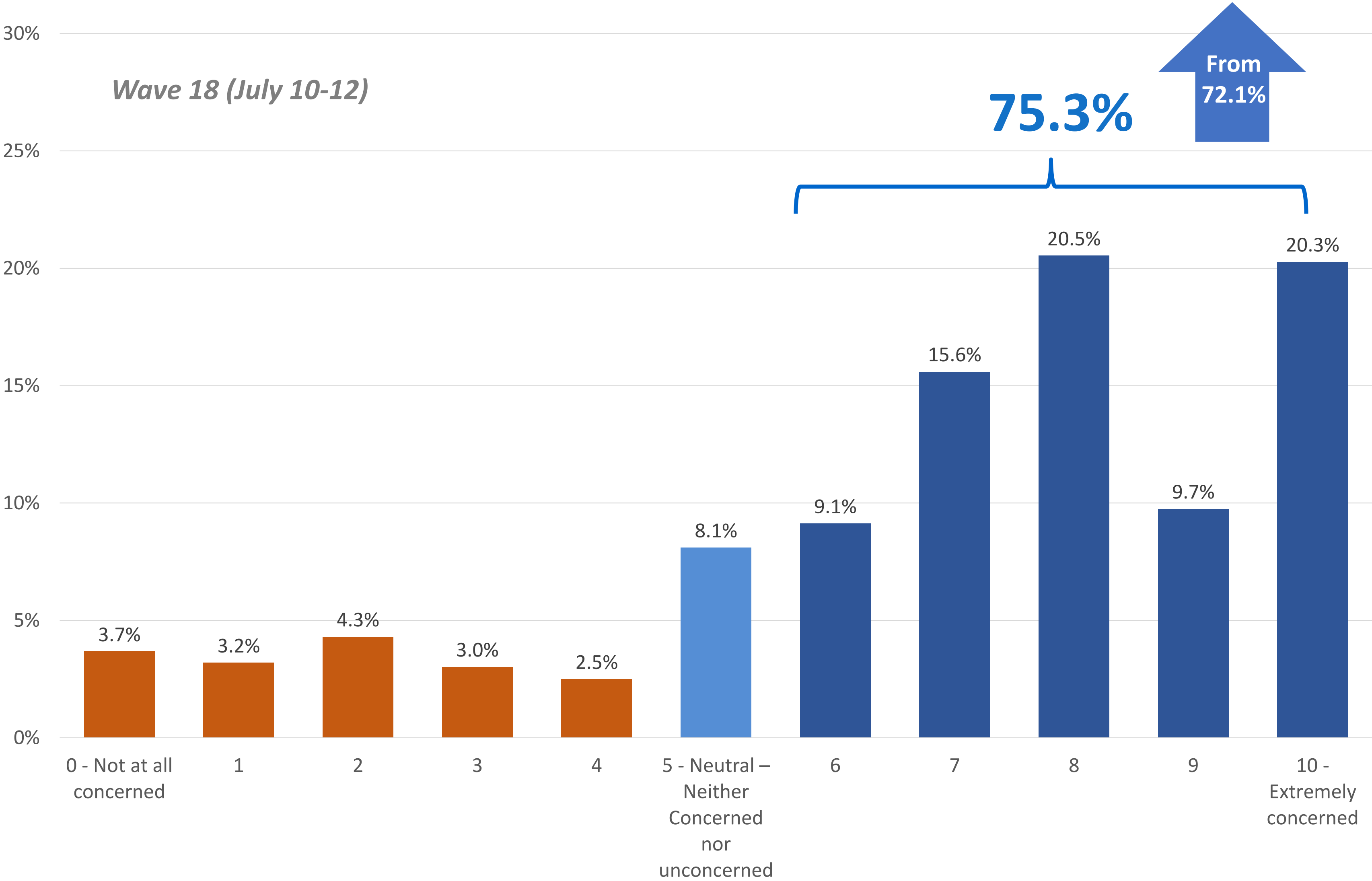




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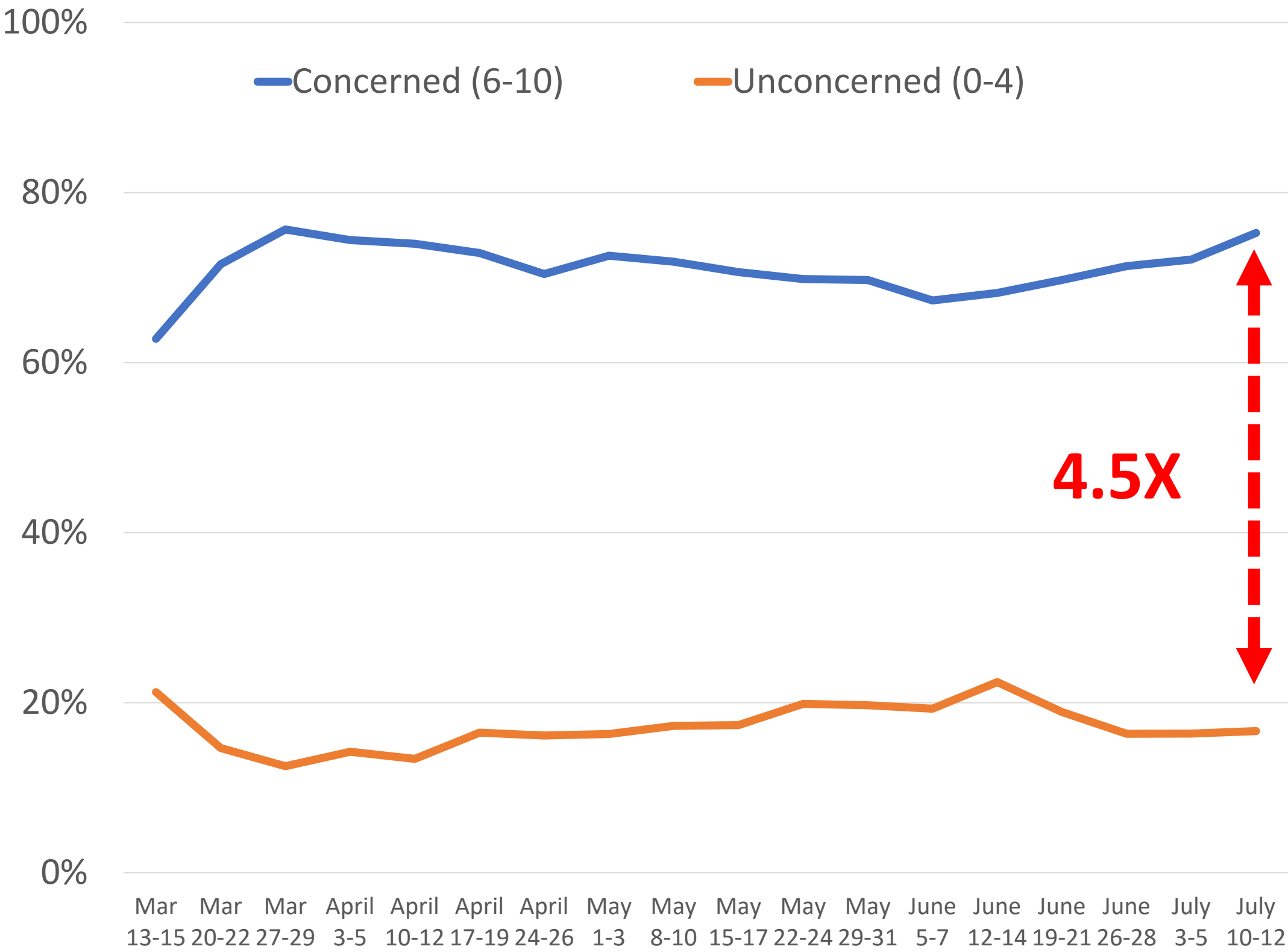




# Personal Safety Perceptions: Time Series

## Personal Safety

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



## Personal Safety

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

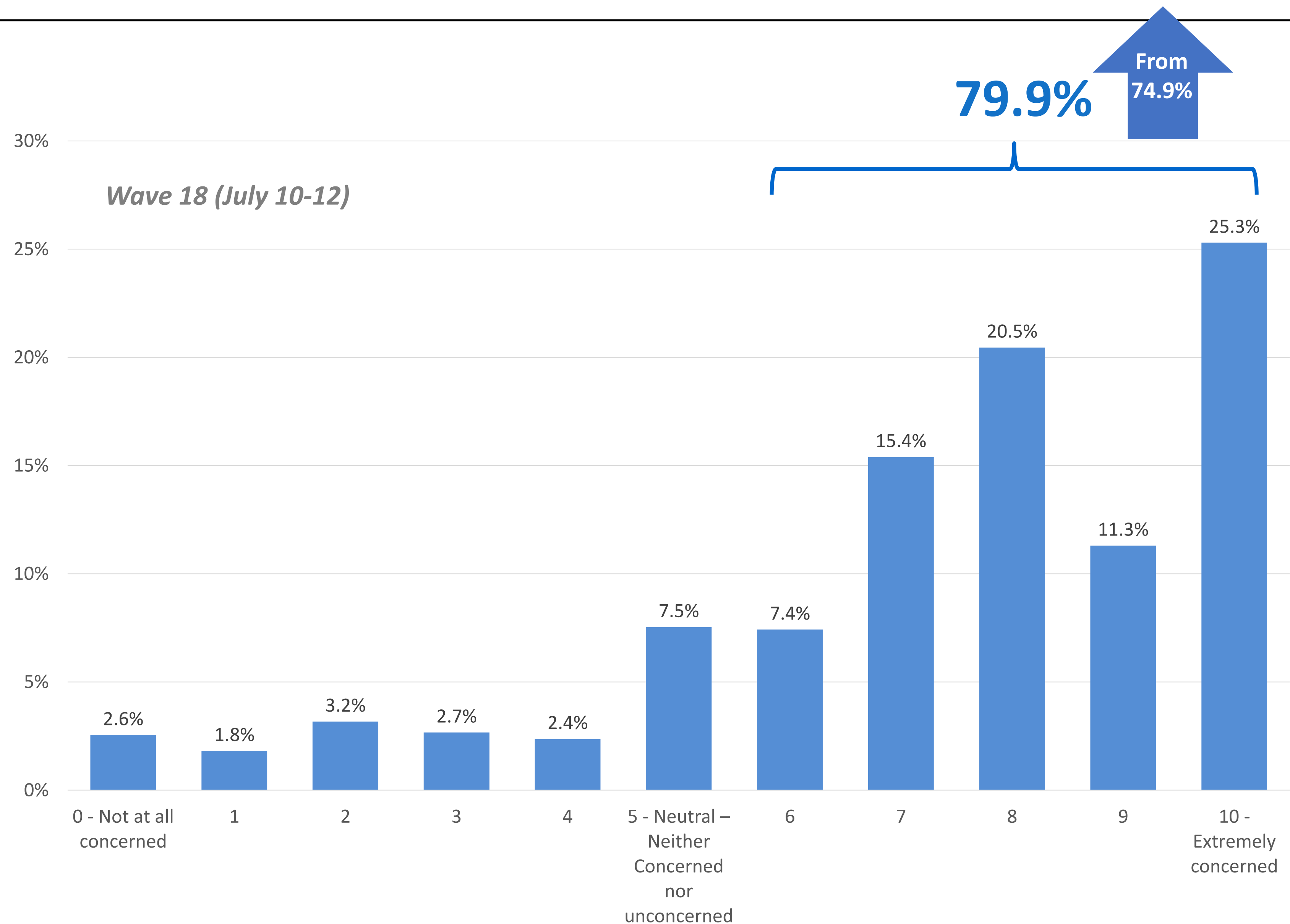




# Health Concerns (Family & Friends)

**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 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

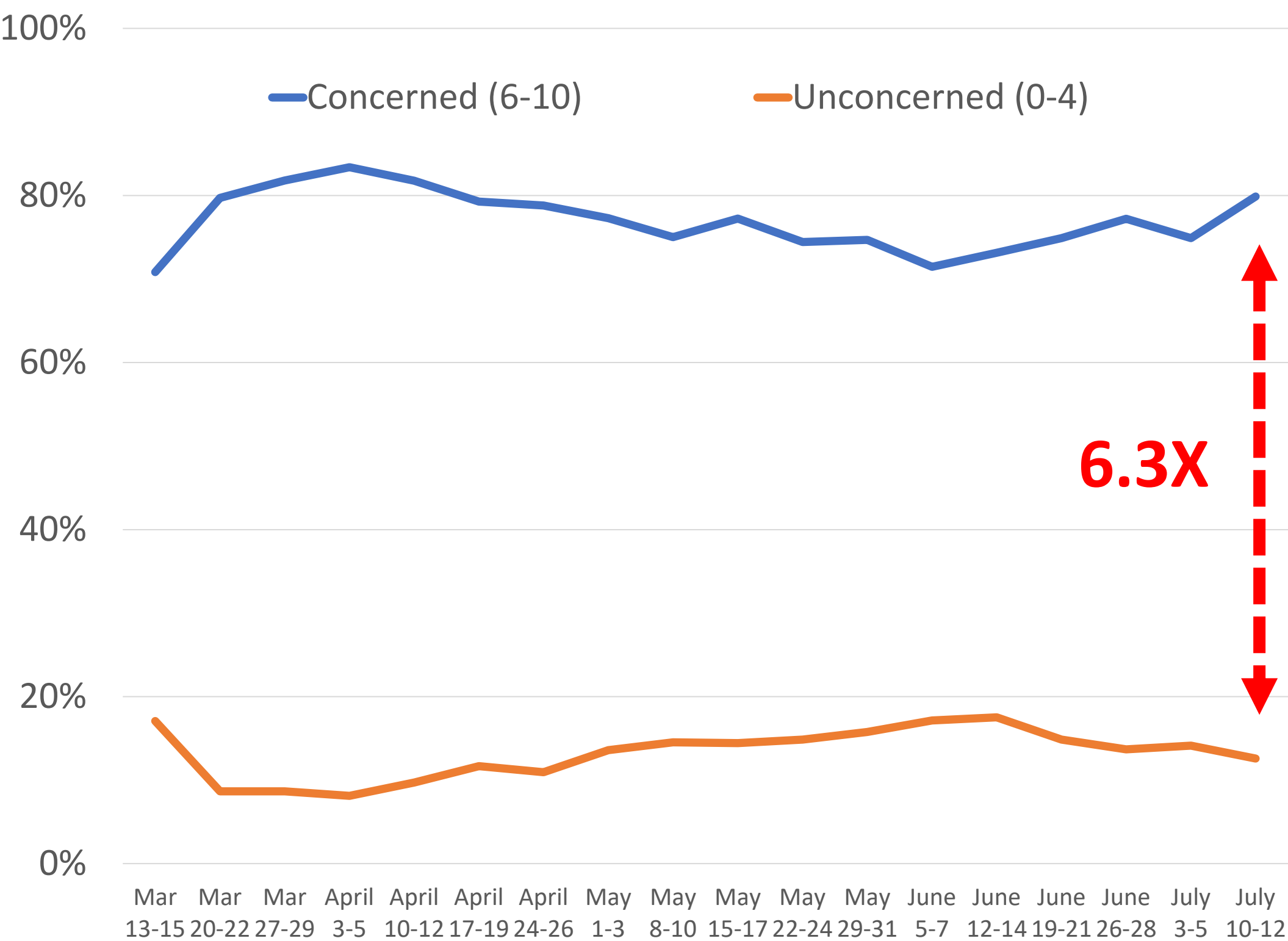




# Friends & Family Safety Perceptions: Time Series

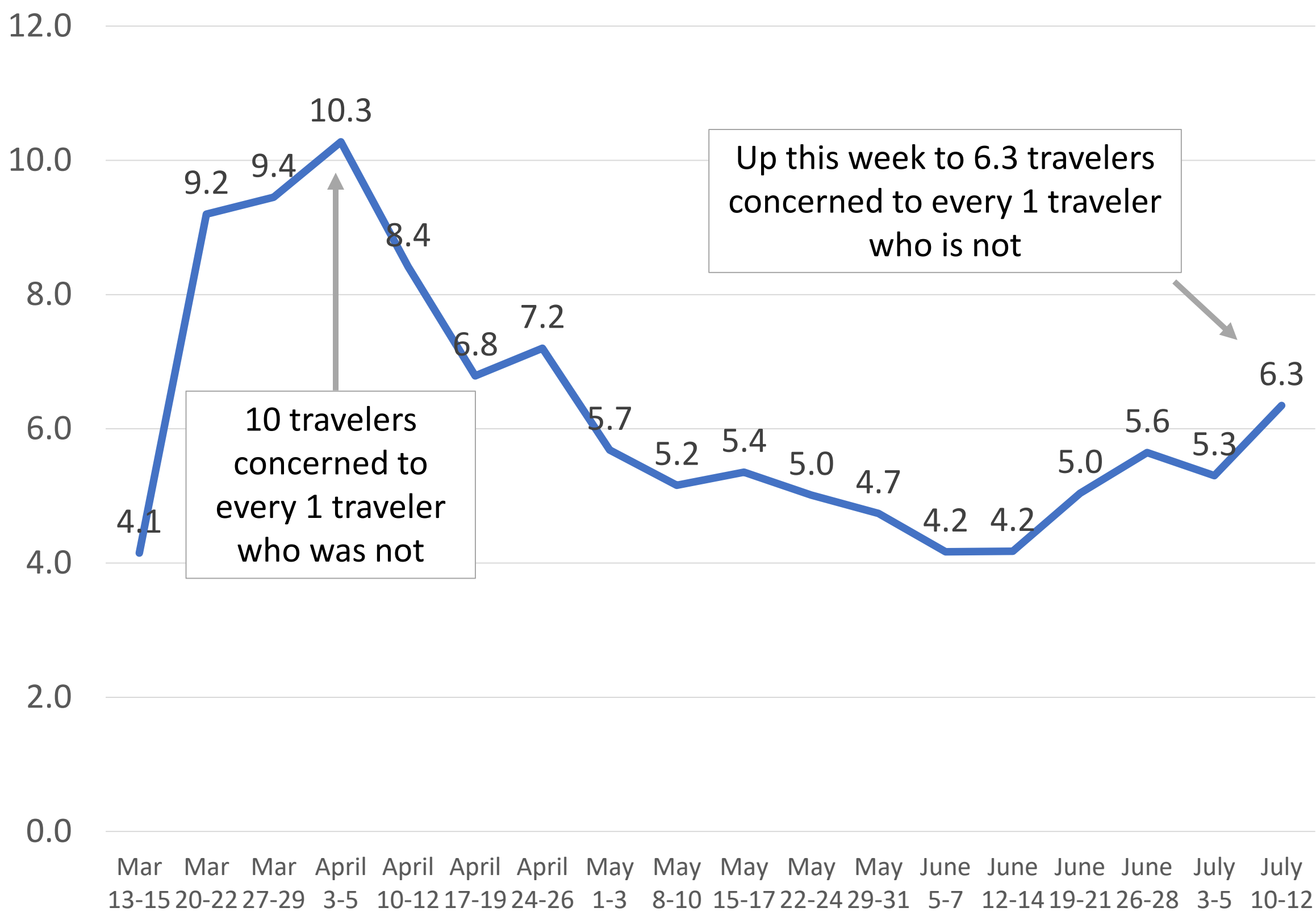
## Safety of Friends and Relatives

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



## Safety of Friends and Relatives

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



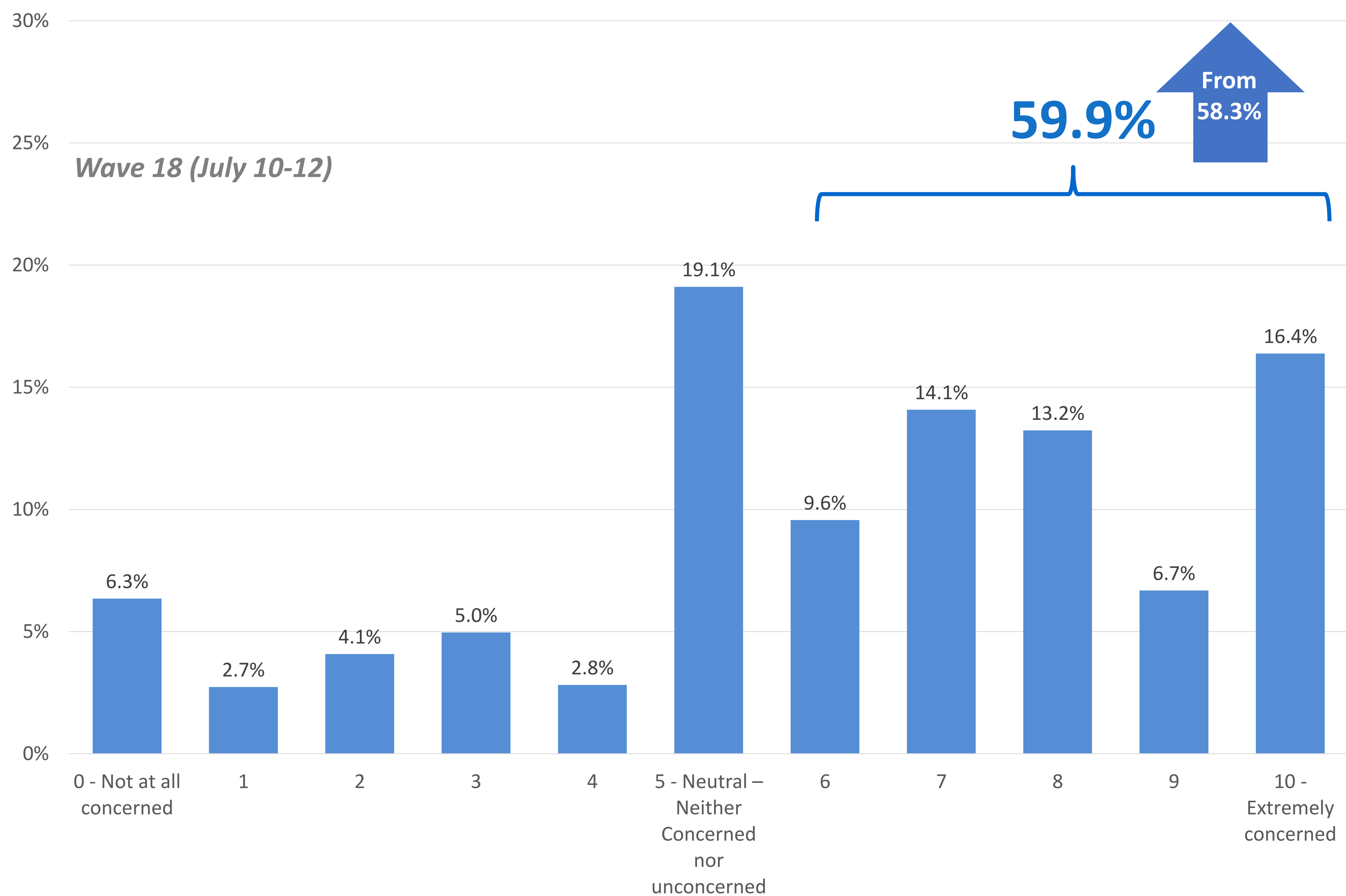
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys.  
Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 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 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

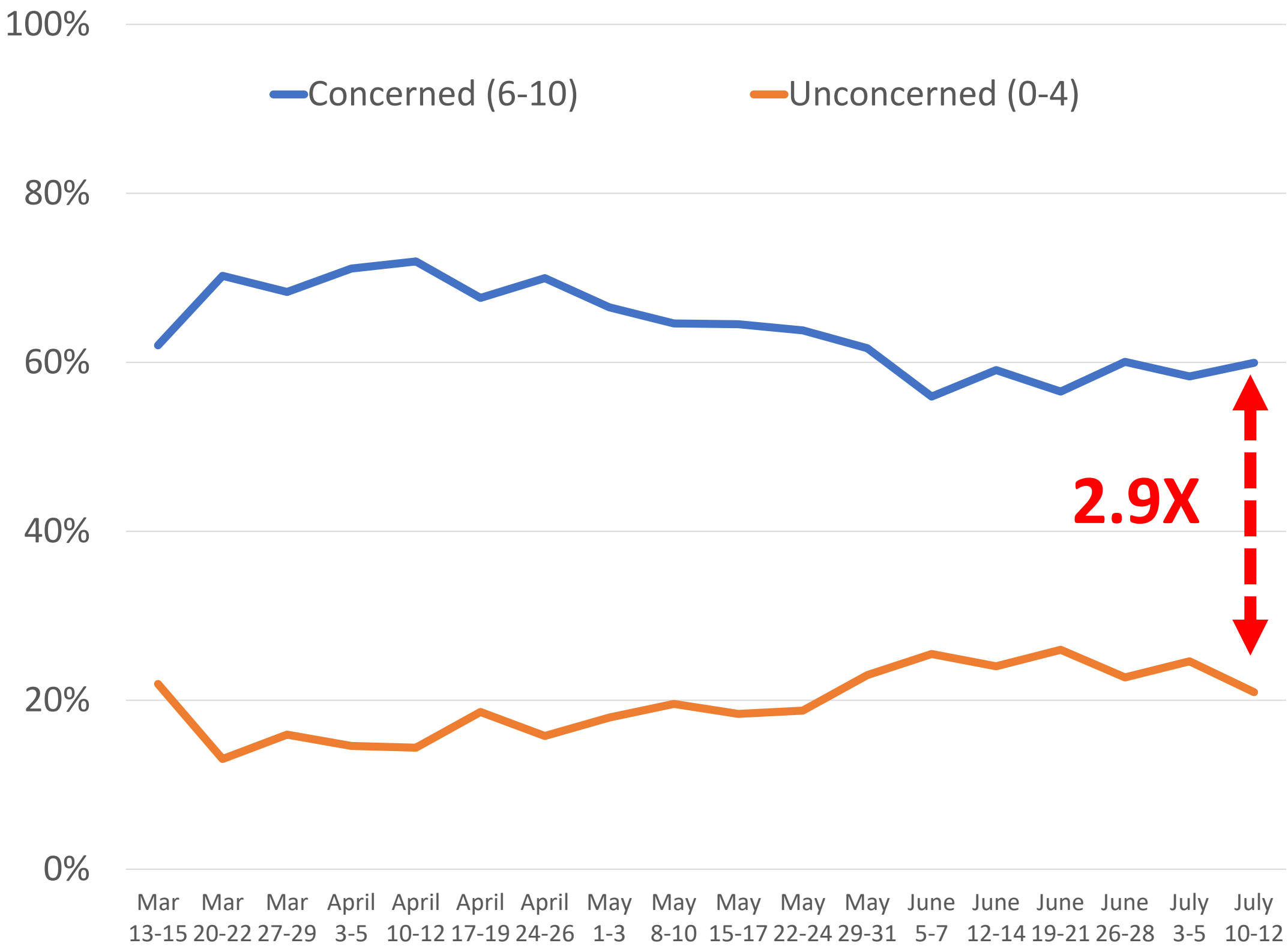




# Concern About Personal Finances: Time Series

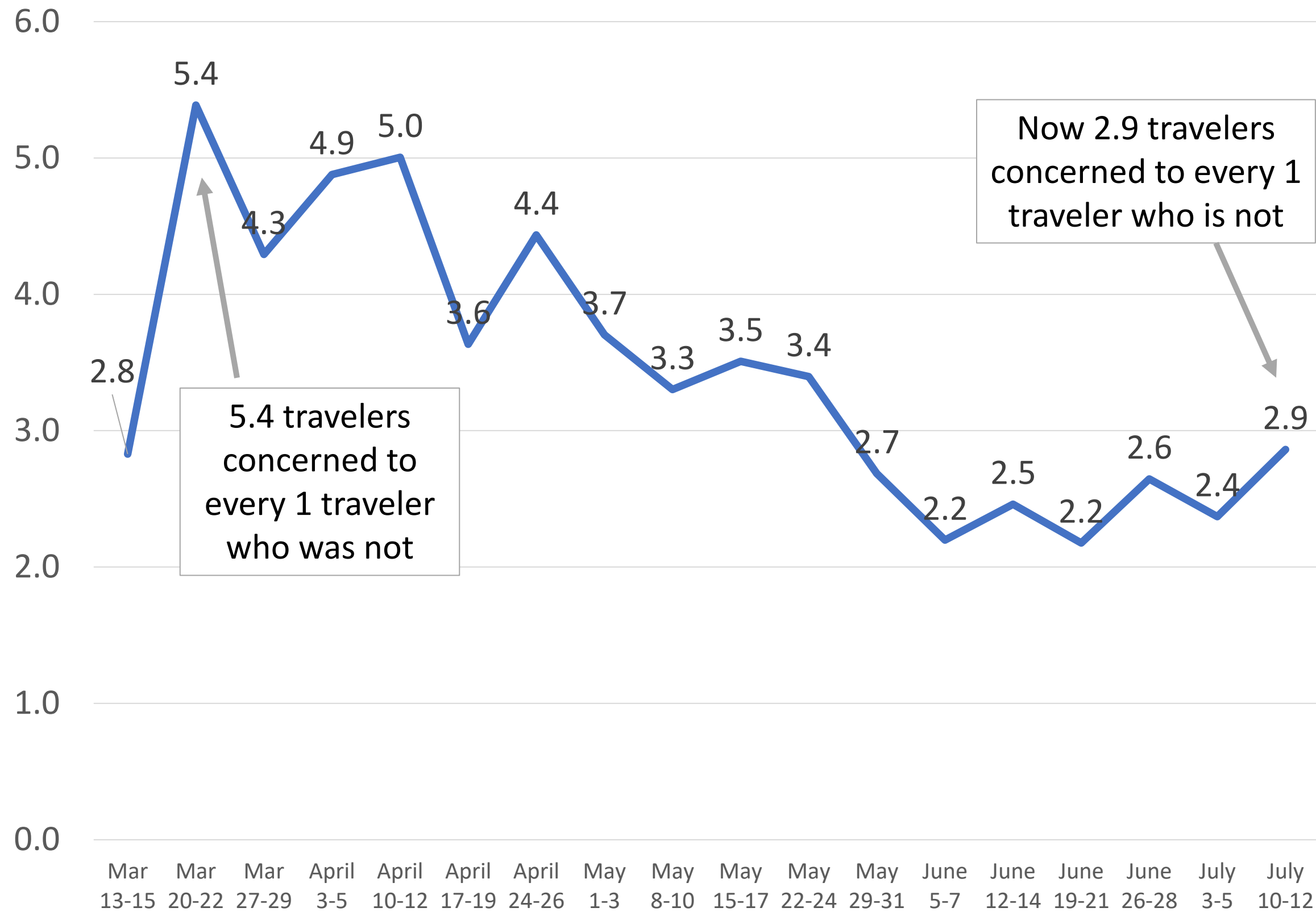
## Personal Finances

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



## Personal Finances

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



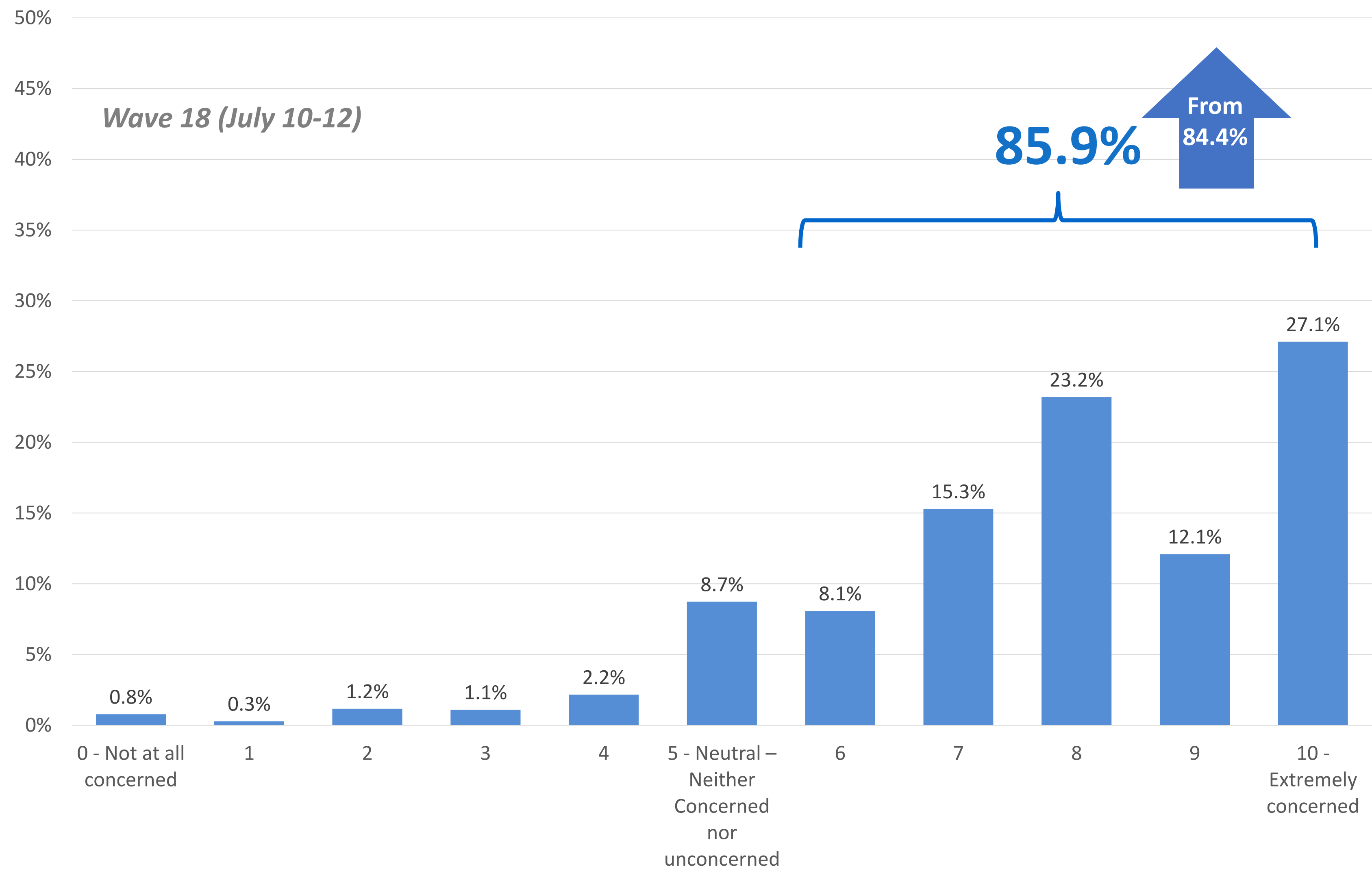
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# Concerns About National Economy

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

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

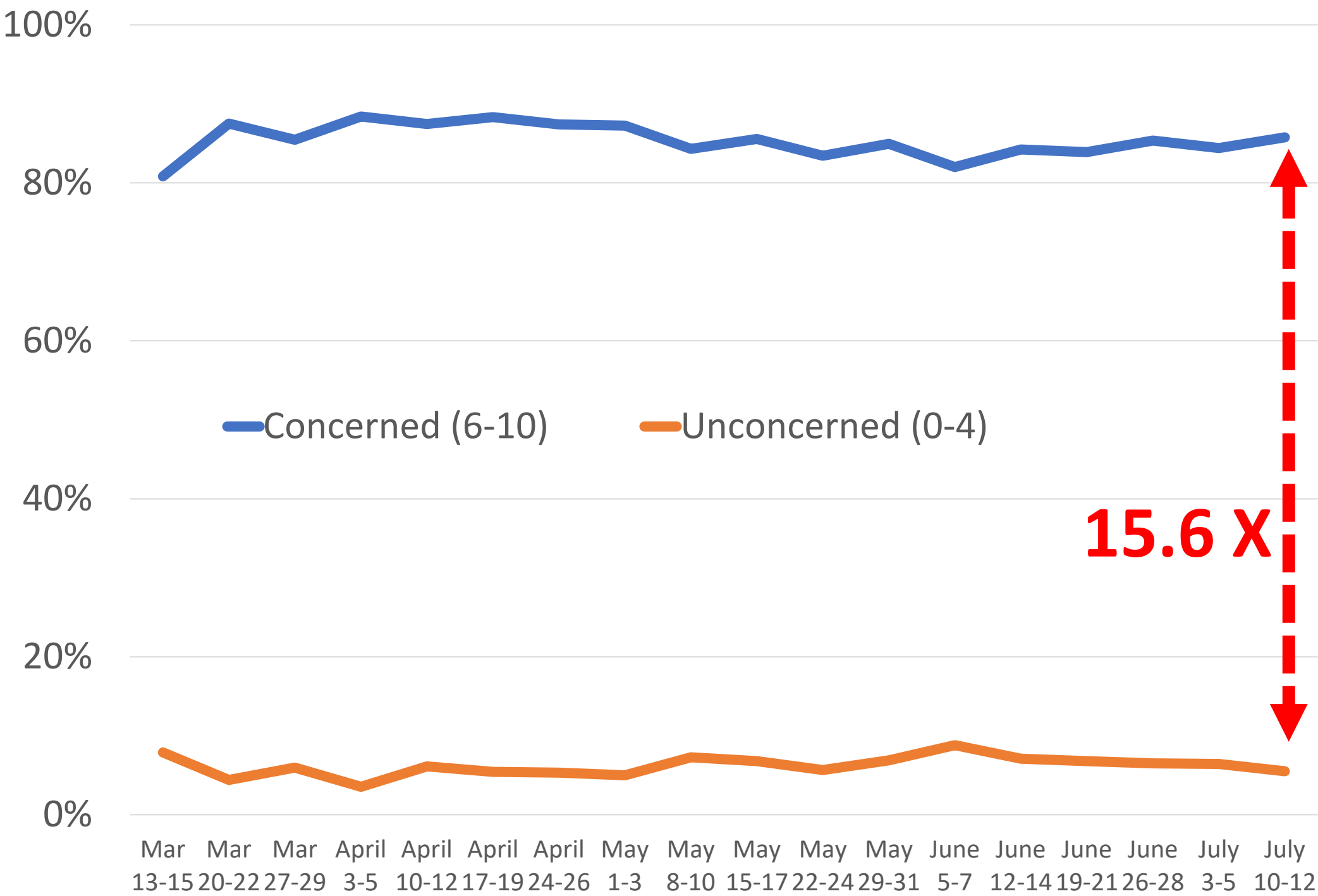




# Concern About National Economy: Time Series

## National Economy

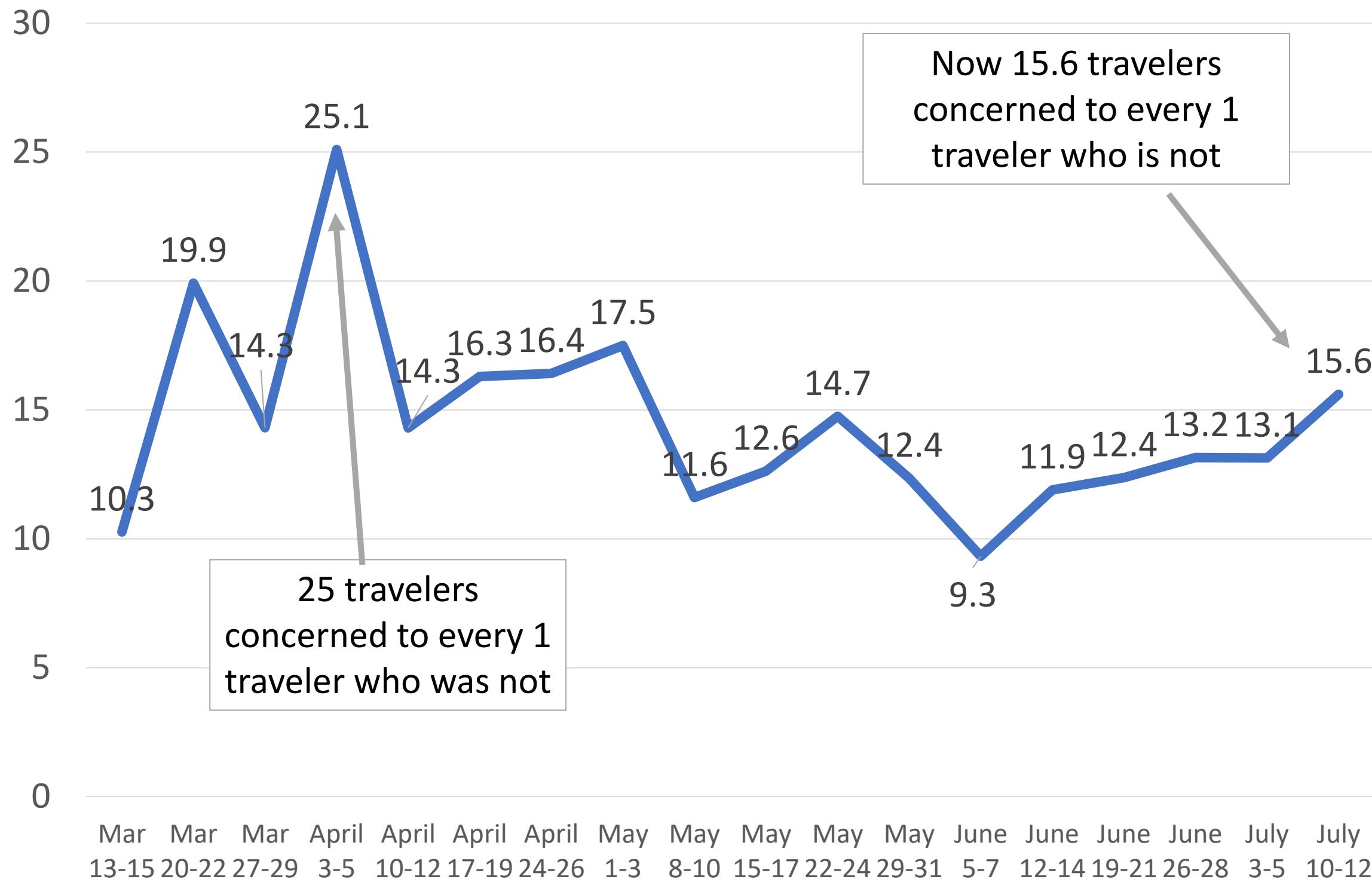
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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

## National Economy

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



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

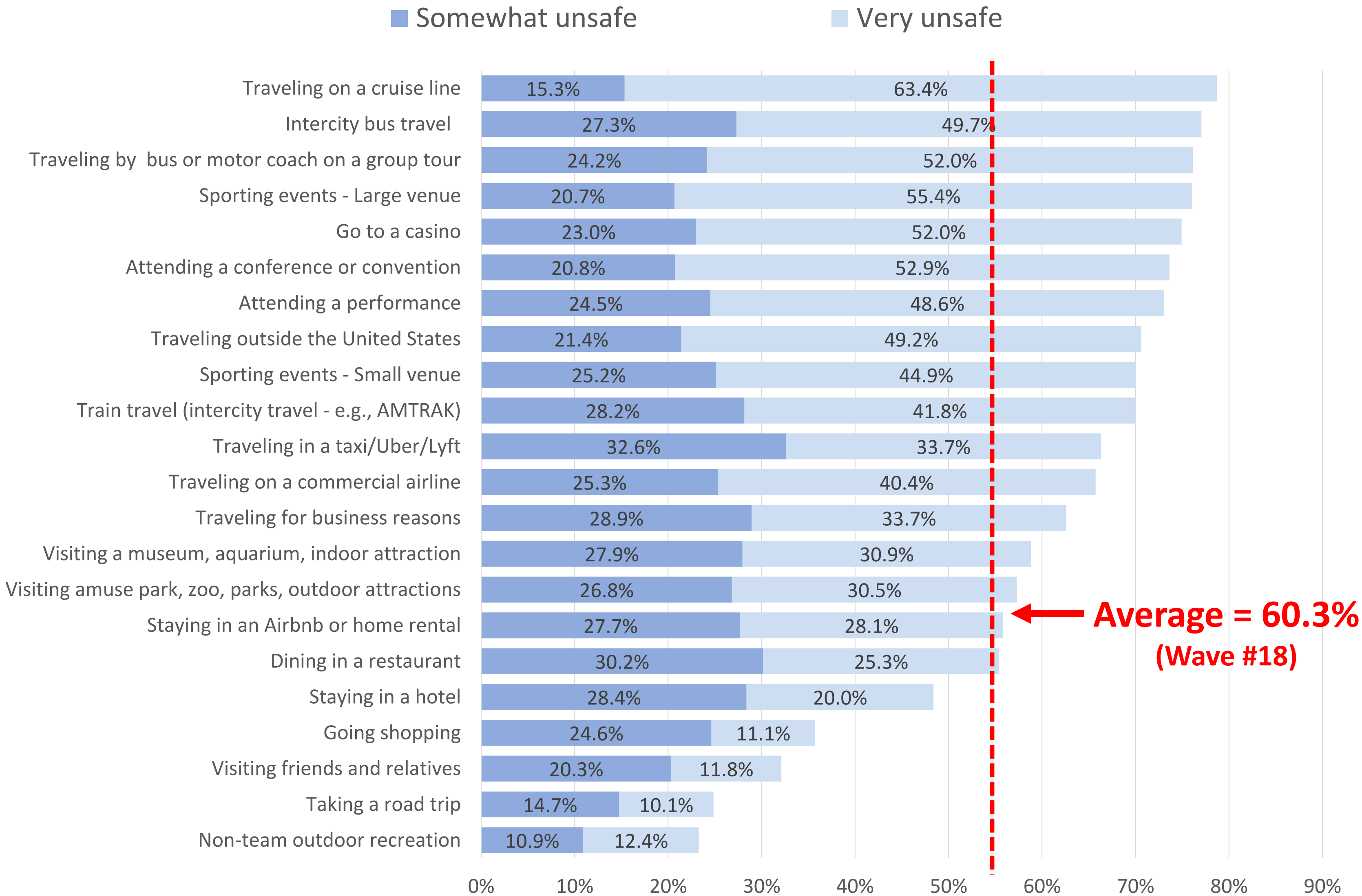
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



# Perceived Safety of Travel Activities (Wave 18)

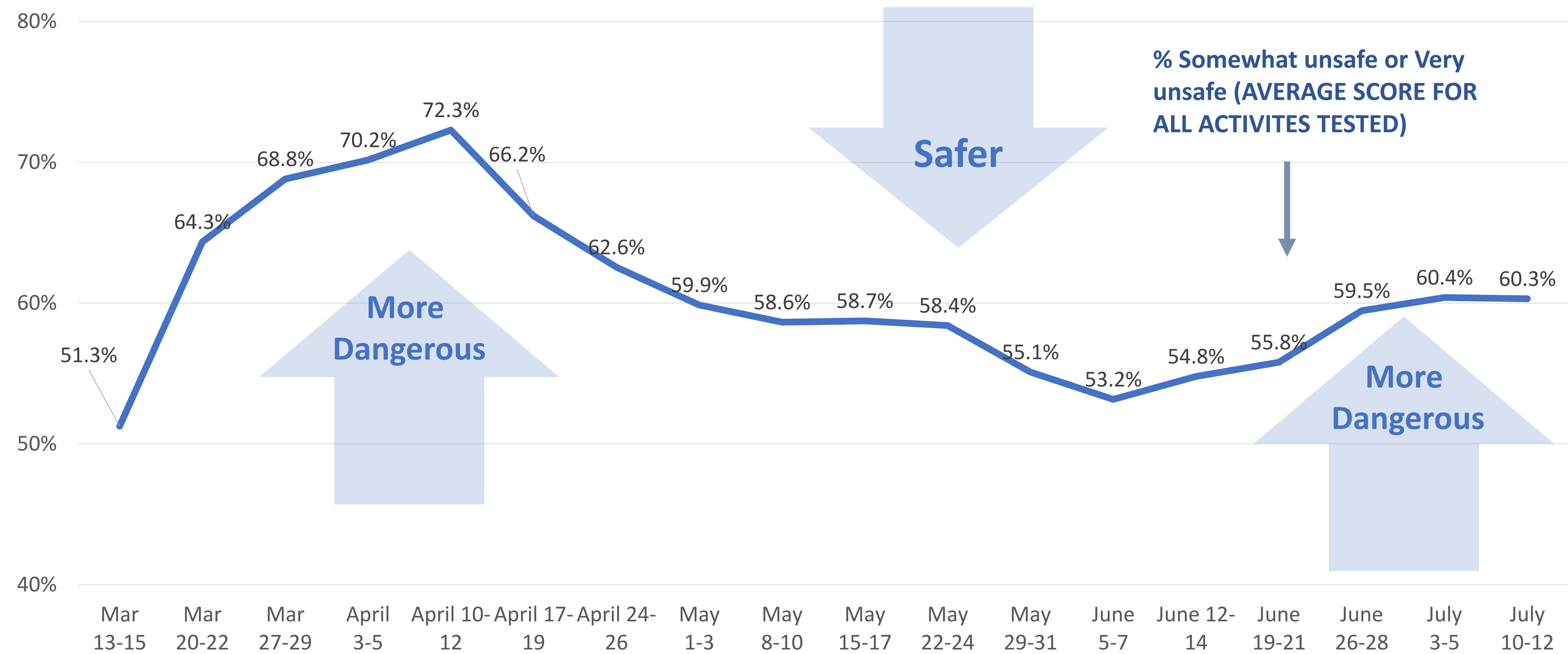
**Question:** At this moment, how safe would you feel doing each type of travel activity?

*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*



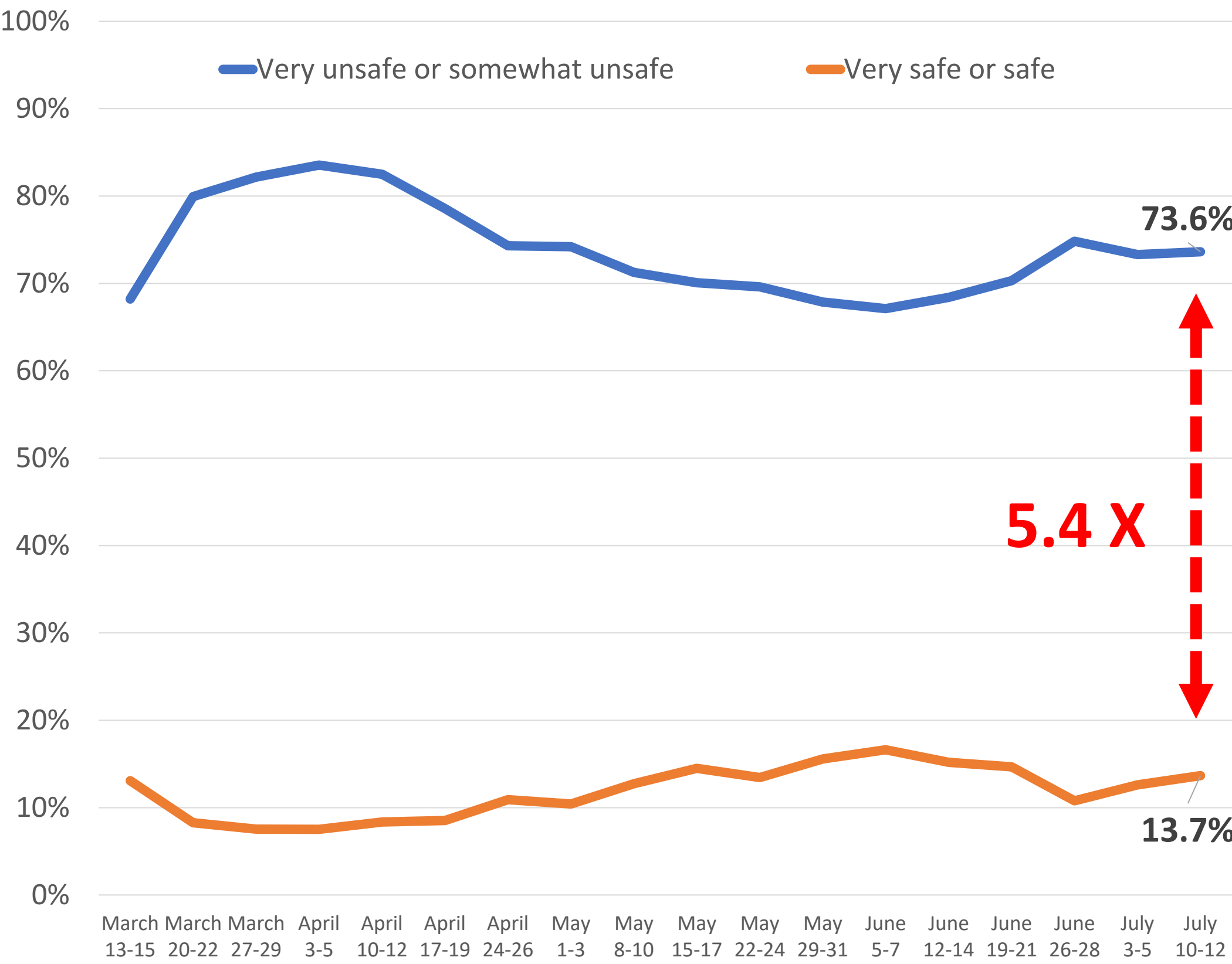


# Perceived Safety of Travel Activities (Waves 1-18 Comparison)

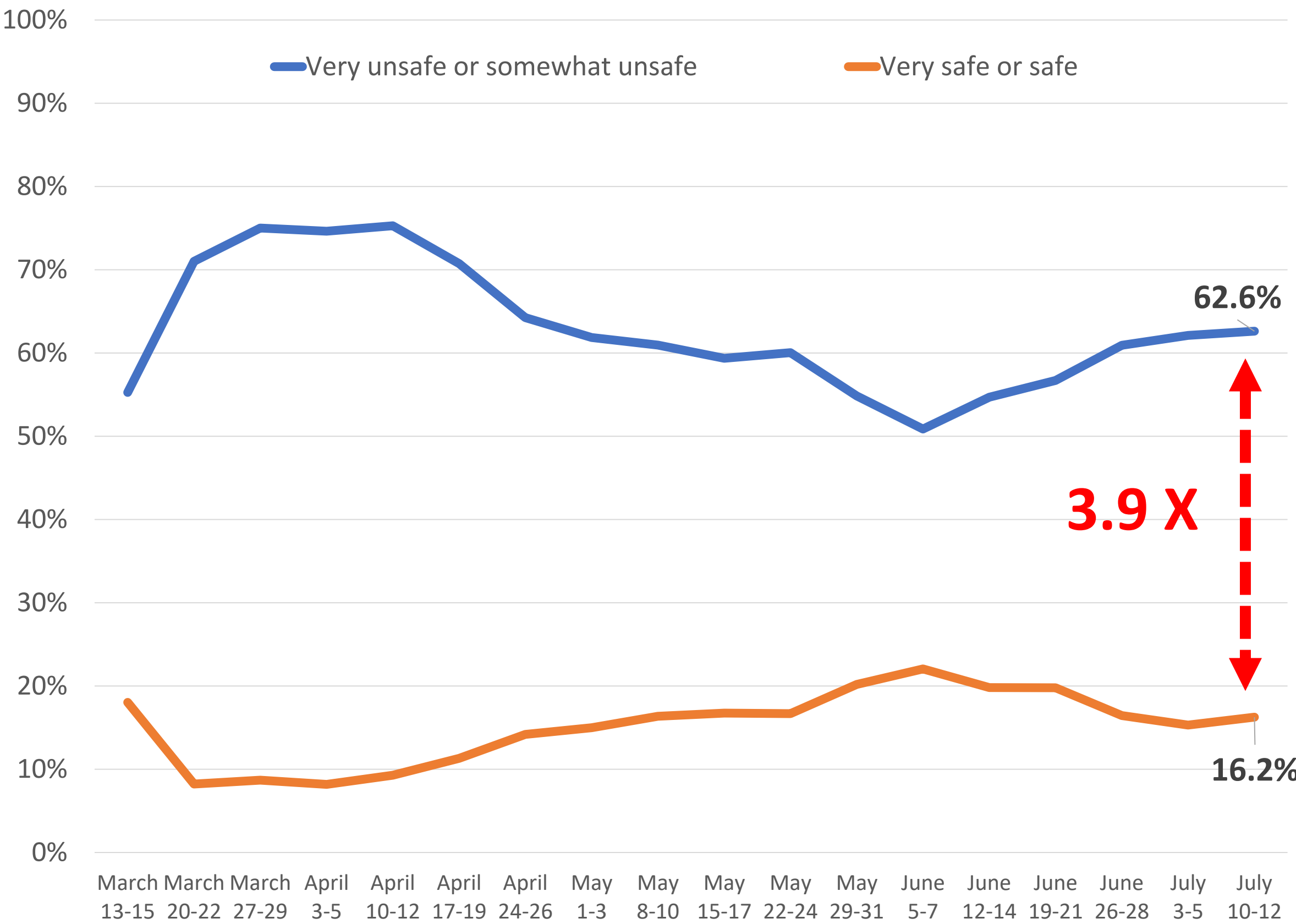


# Perceived Safety of Travel Activities (Waves 1-18 Comparison)

Attending a Convention or Conference



Business Travel

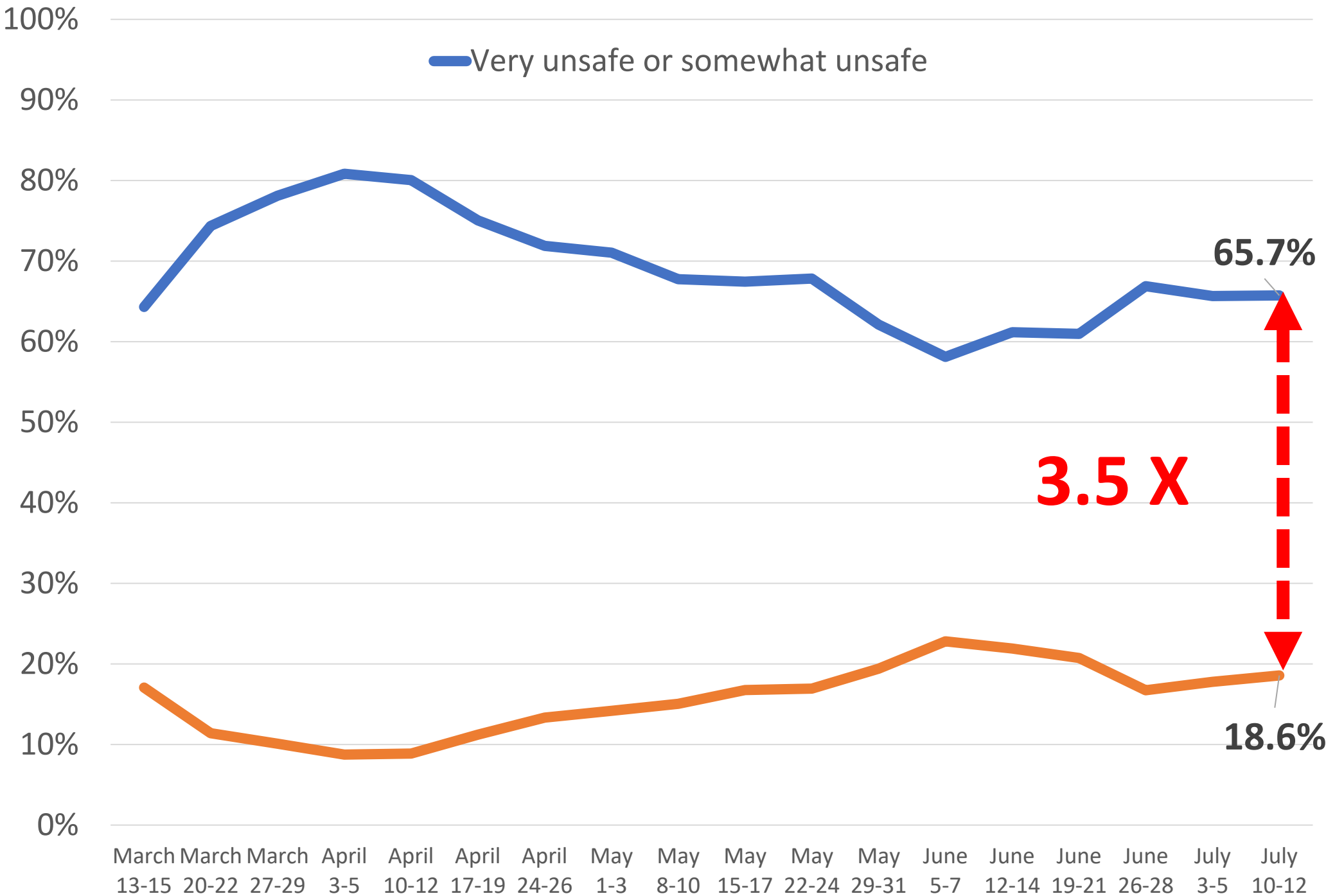


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21,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

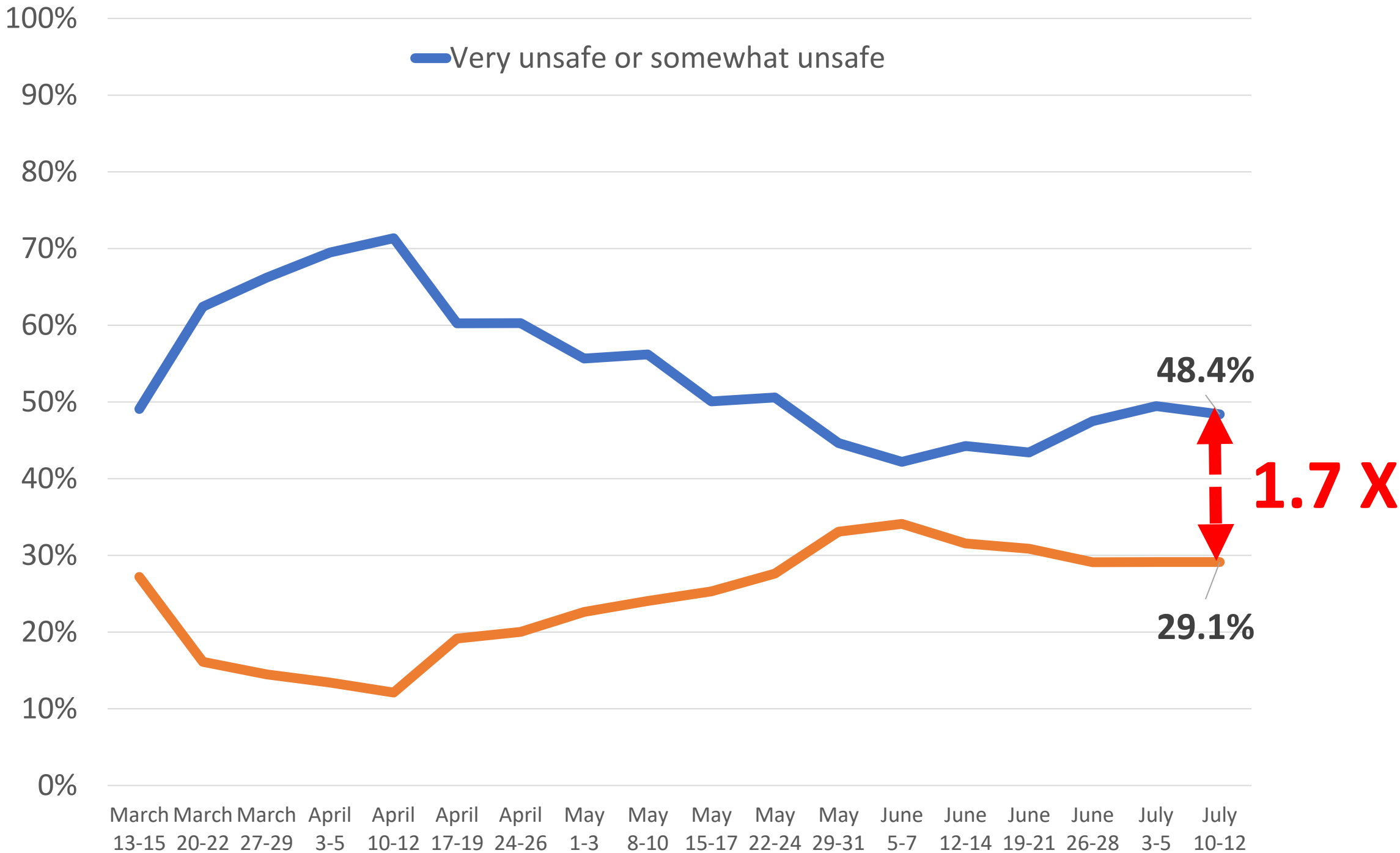


# Perceived Safety of Travel Activities (Waves 1-18 Comparison)

### Traveling on a Commercial Airline

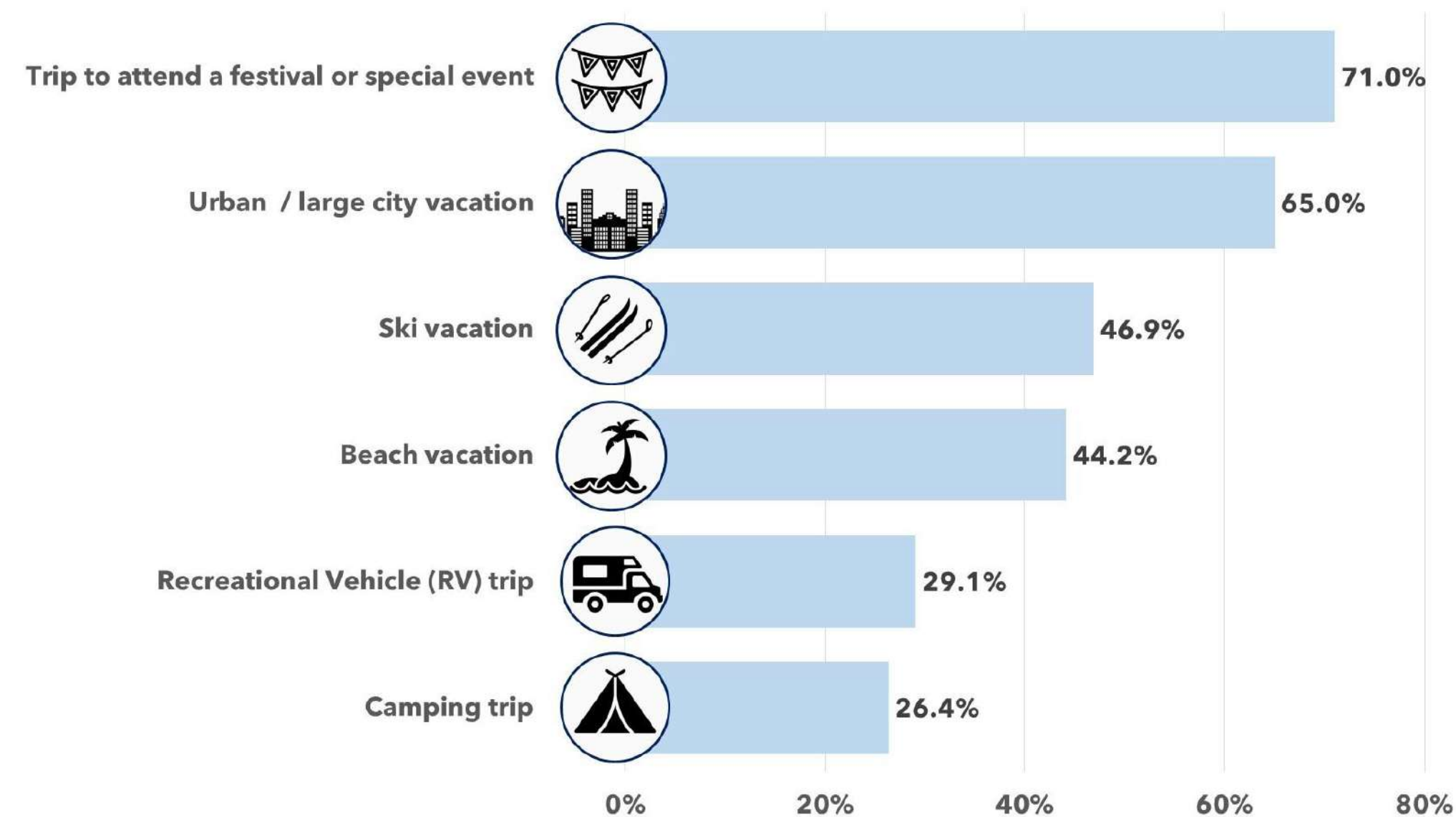


### Staying in a Hotel



(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 and 1,213 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 and 10-12, 2020)

## PERCEIVED SAFETY OF TRIP TYPES (% SOMEWHAT UNSAFE OR VERY UNSAFE)

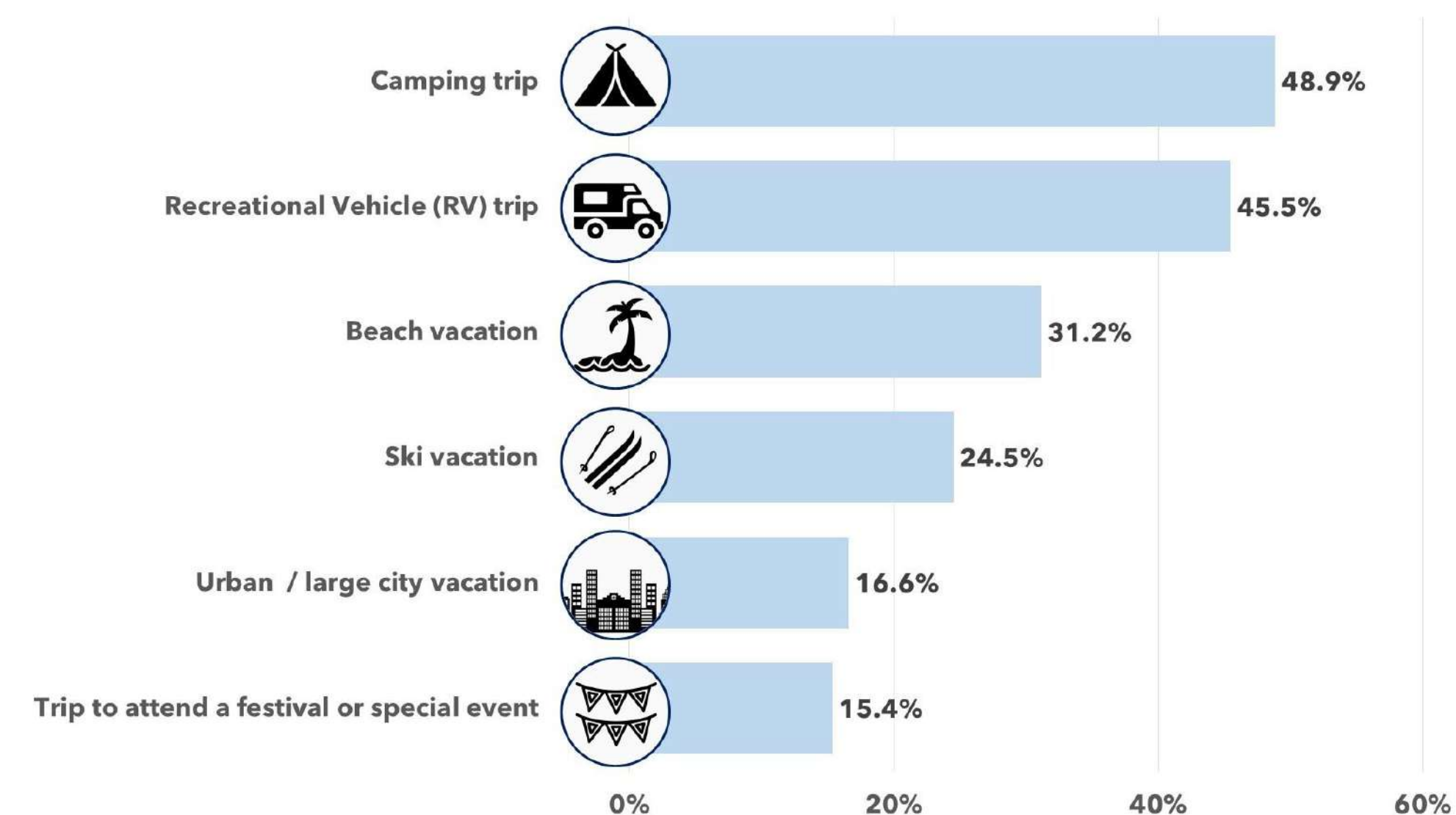


**QUESTION: PLEASE EVALUATE THE SAFETY OF SEVERAL TYPES OF DOMESTIC LEISURE TRIPS IF TAKEN SOME TIME IN 2020.**

(Base: Wave 18 data. All respondents, 1,213 completed surveys.  
Data collected July 10-12, 2020)

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## PERCEIVED SAFETY OF TRIP TYPES (% SOMEWHAT SAFE OR VERY SAFE)



**QUESTION: PLEASE EVALUATE THE SAFETY OF SEVERAL TYPES OF DOMESTIC LEISURE TRIPS IF TAKEN SOME TIME IN 2020.**

(Base: Wave 18 data. All respondents, 1,213 completed surveys.  
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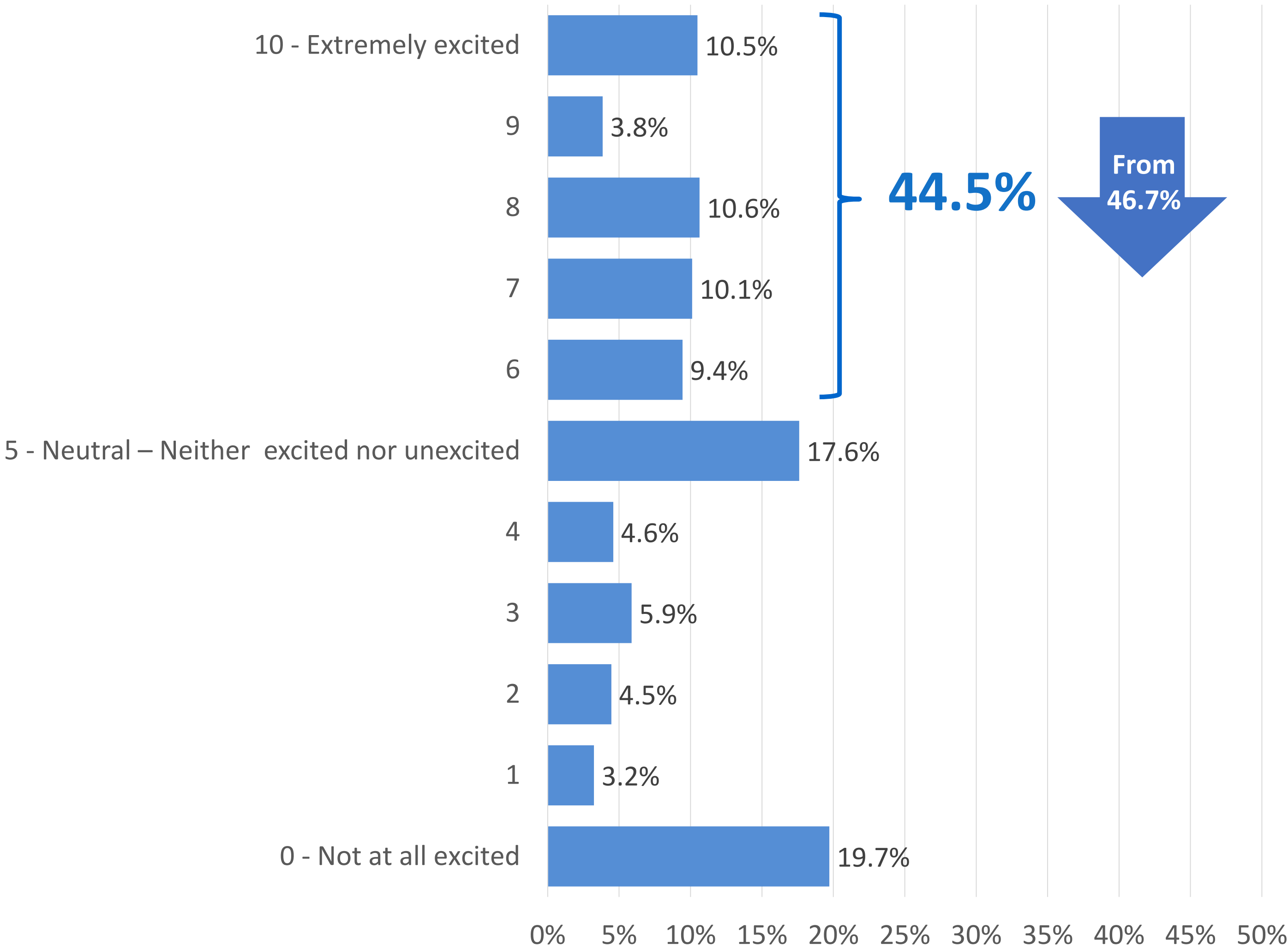


# Excitement to Travel Now

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

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

*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*

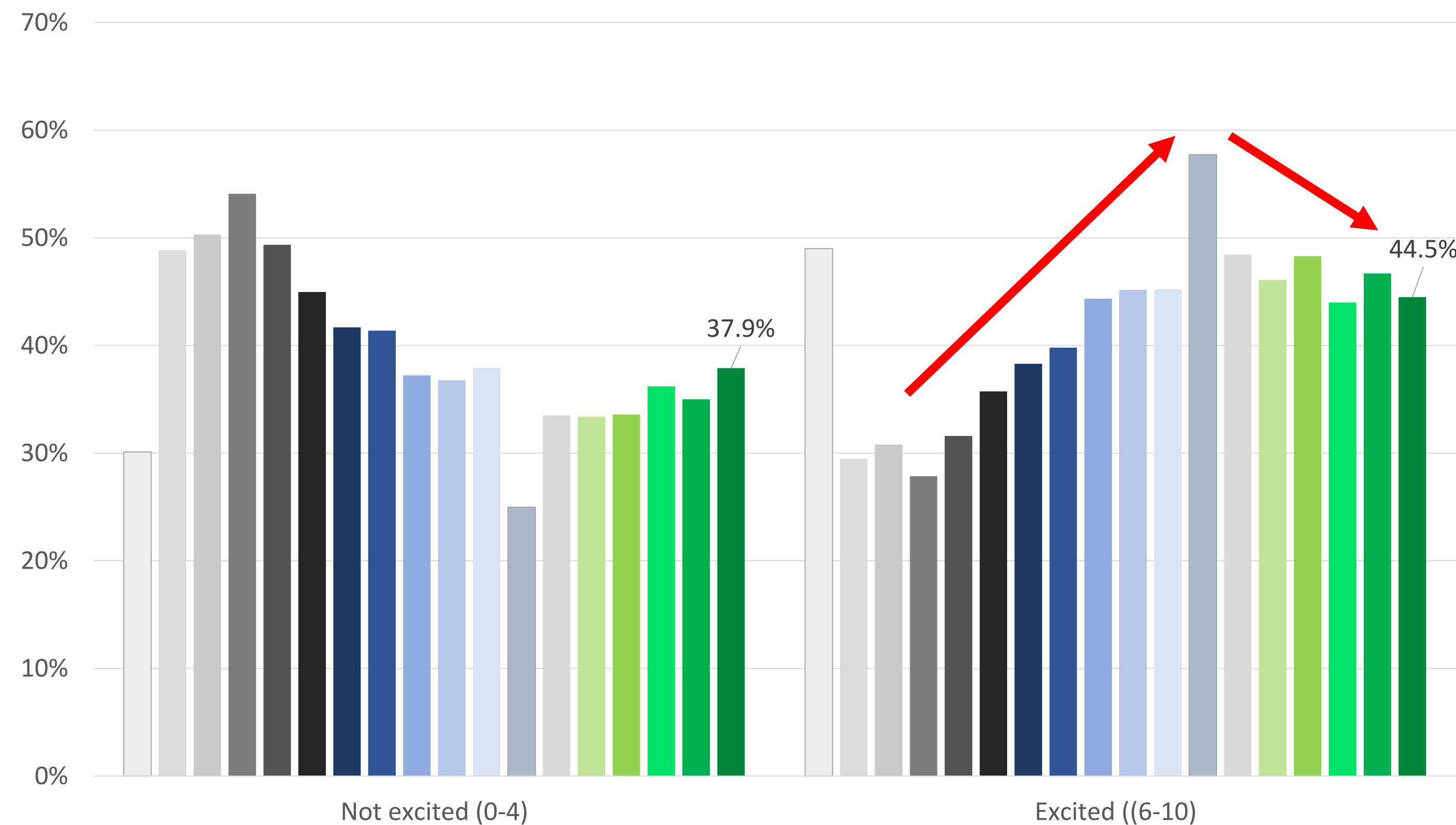


# Excitement to Travel Now (Excited vs. Not Excited)

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

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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 and 1,213 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 and 10-12, 2020)



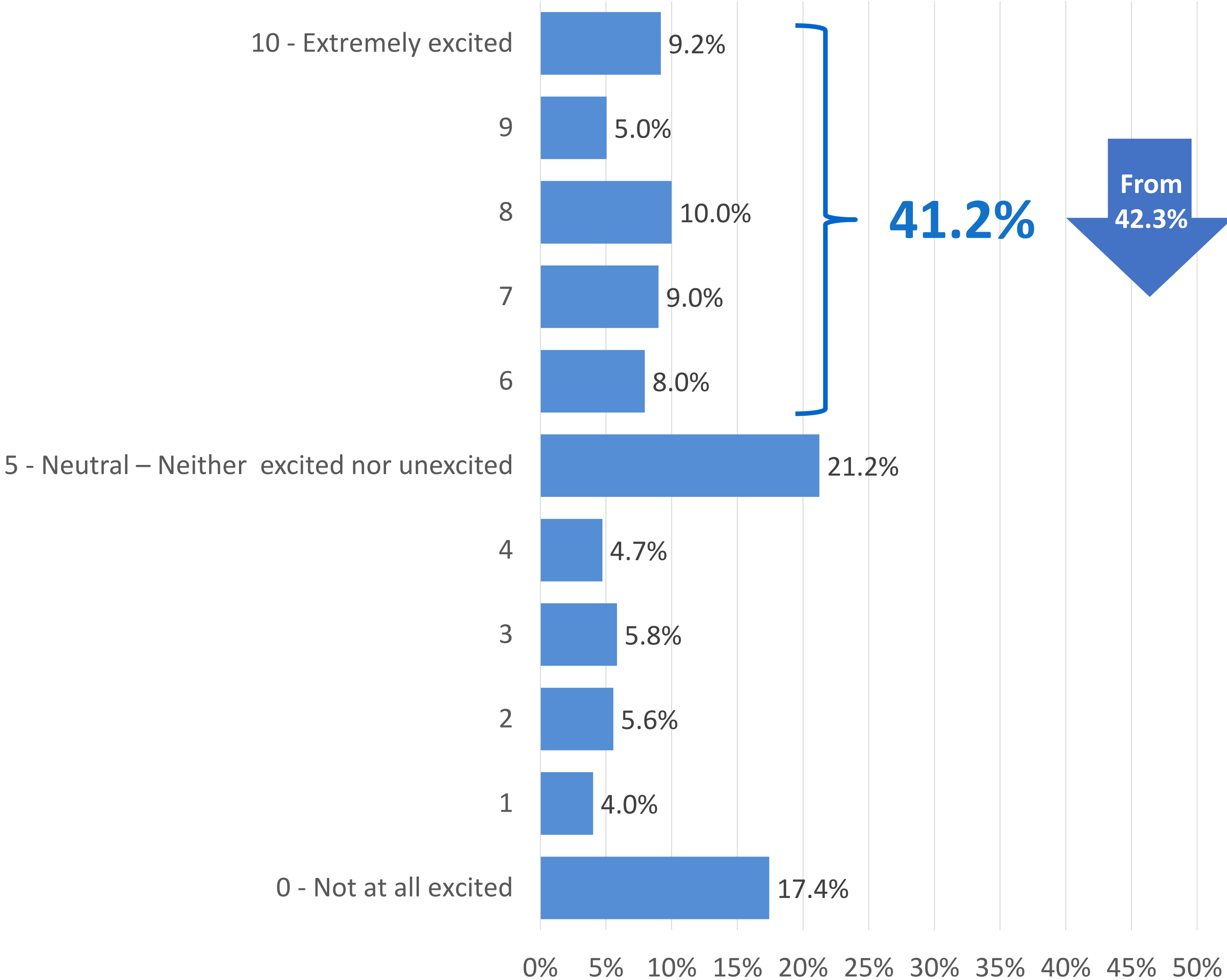
March 13 - 15 March 20 - 22 March 27 - 29 April 3-5 April 10-12 April 17-19  
April 24-26 May 1-3 May 8-10 May 15-17 May 22-24 May 29-31  
June 5-7 June 12-14 June 19-21 June 26-28 July 3-5 July 10-12



# Openness to Travel Information

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

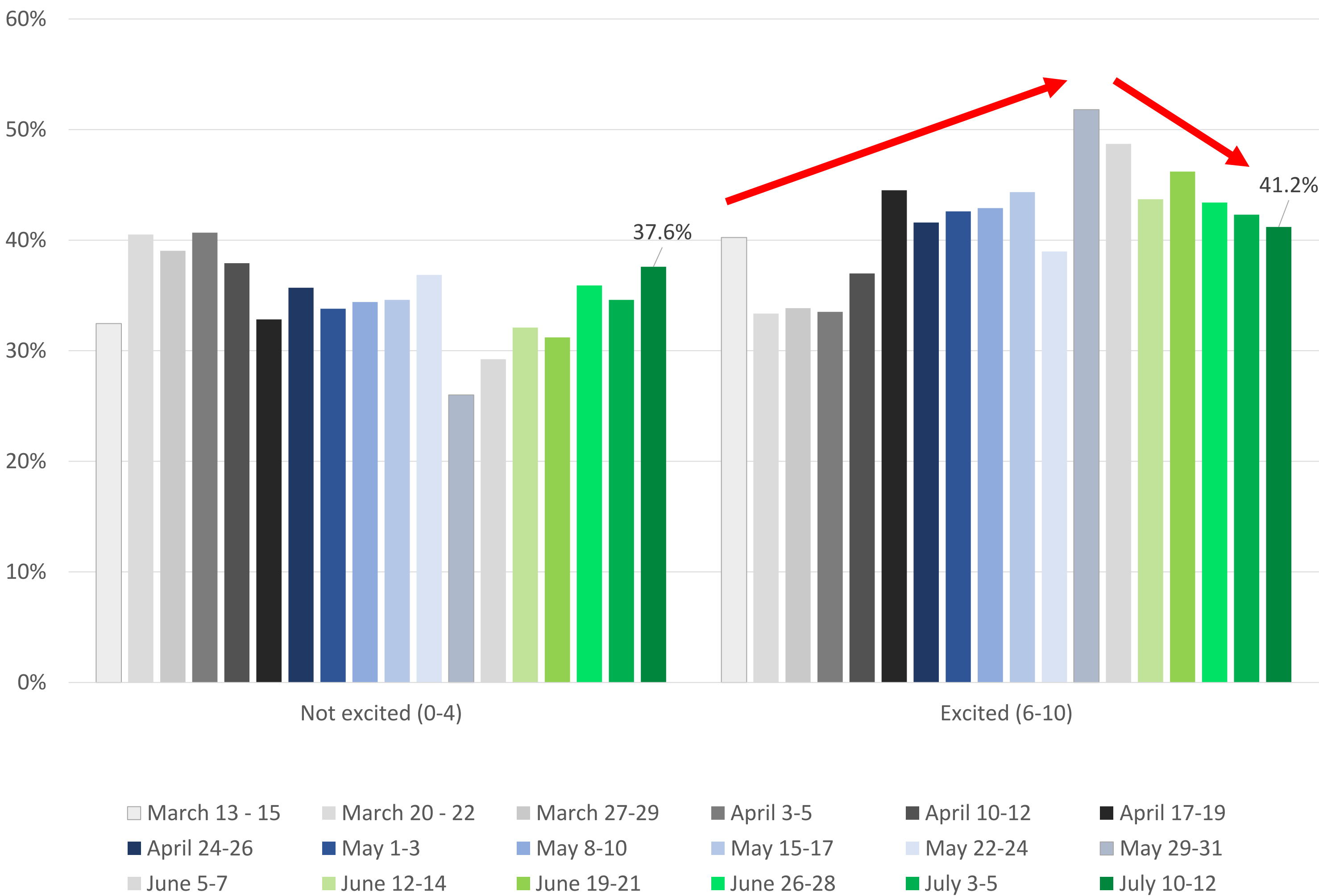
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# Openness to Travel Information (Excited vs. Not Excited)

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

*(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 and 1,213 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 and 10-12, 2020)*

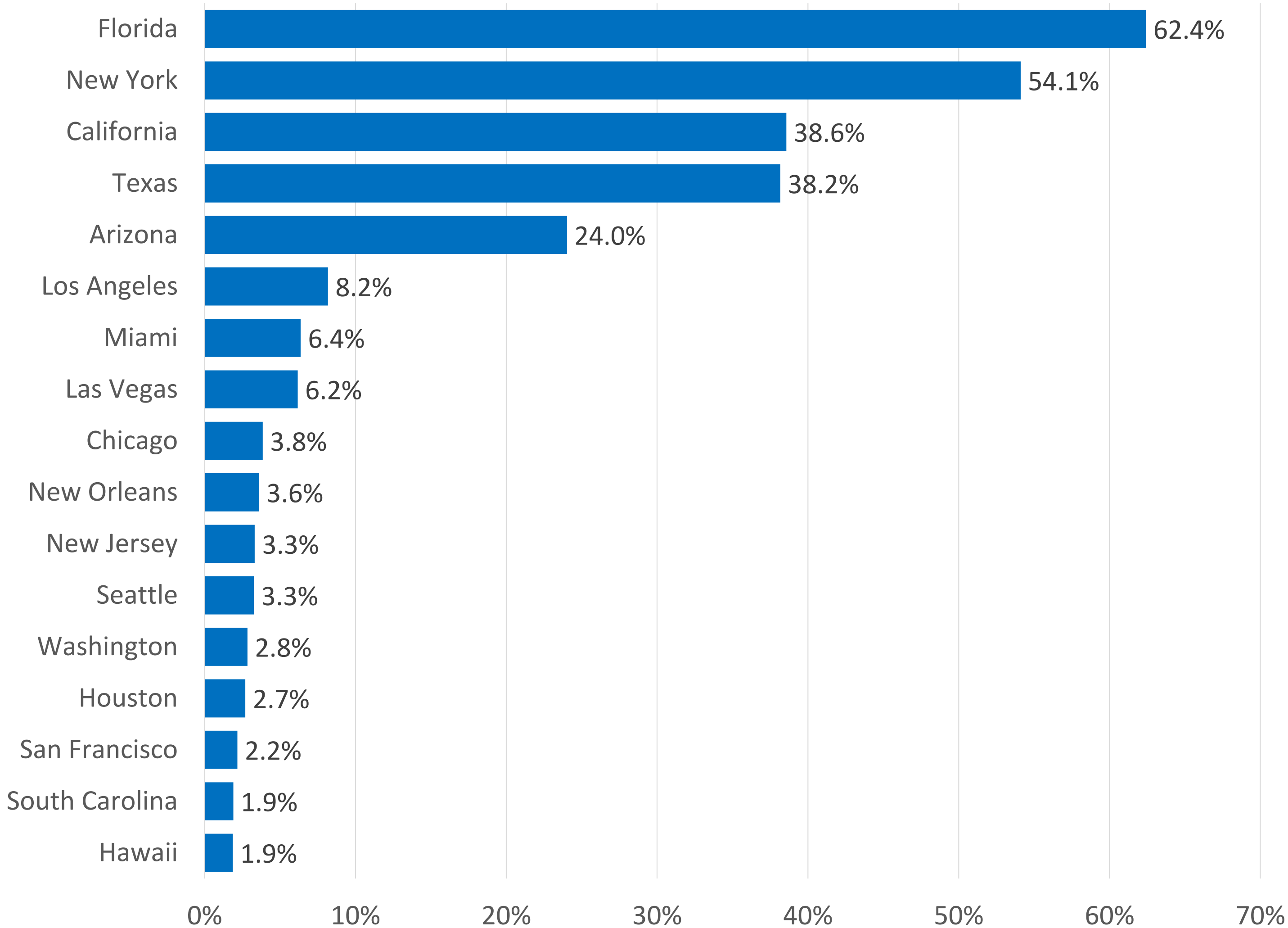




# Most Talked About Coronavirus Hotspots

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

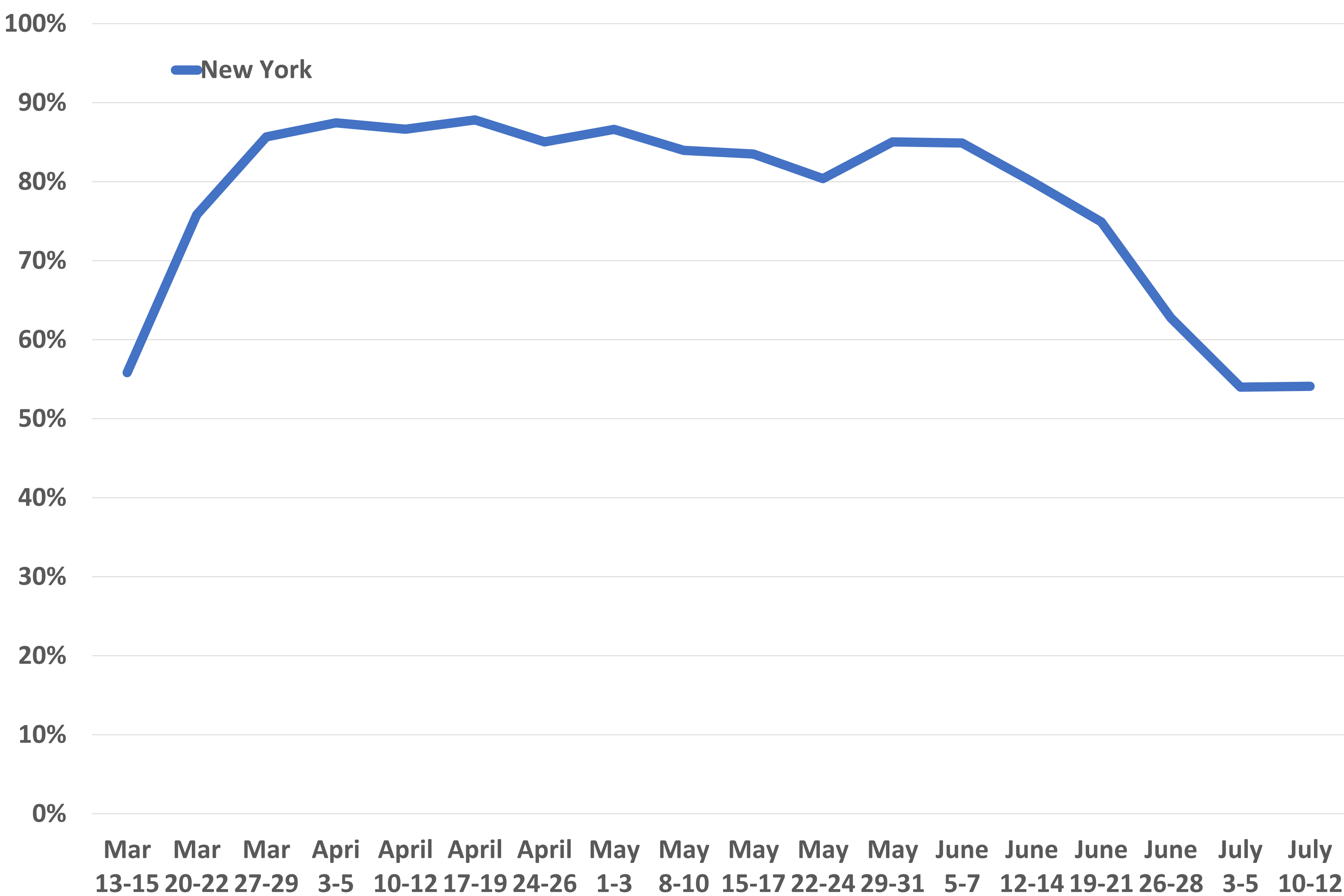
*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*



# Most Talked About Coronavirus Hotspots: Top Destinations

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

*(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)*

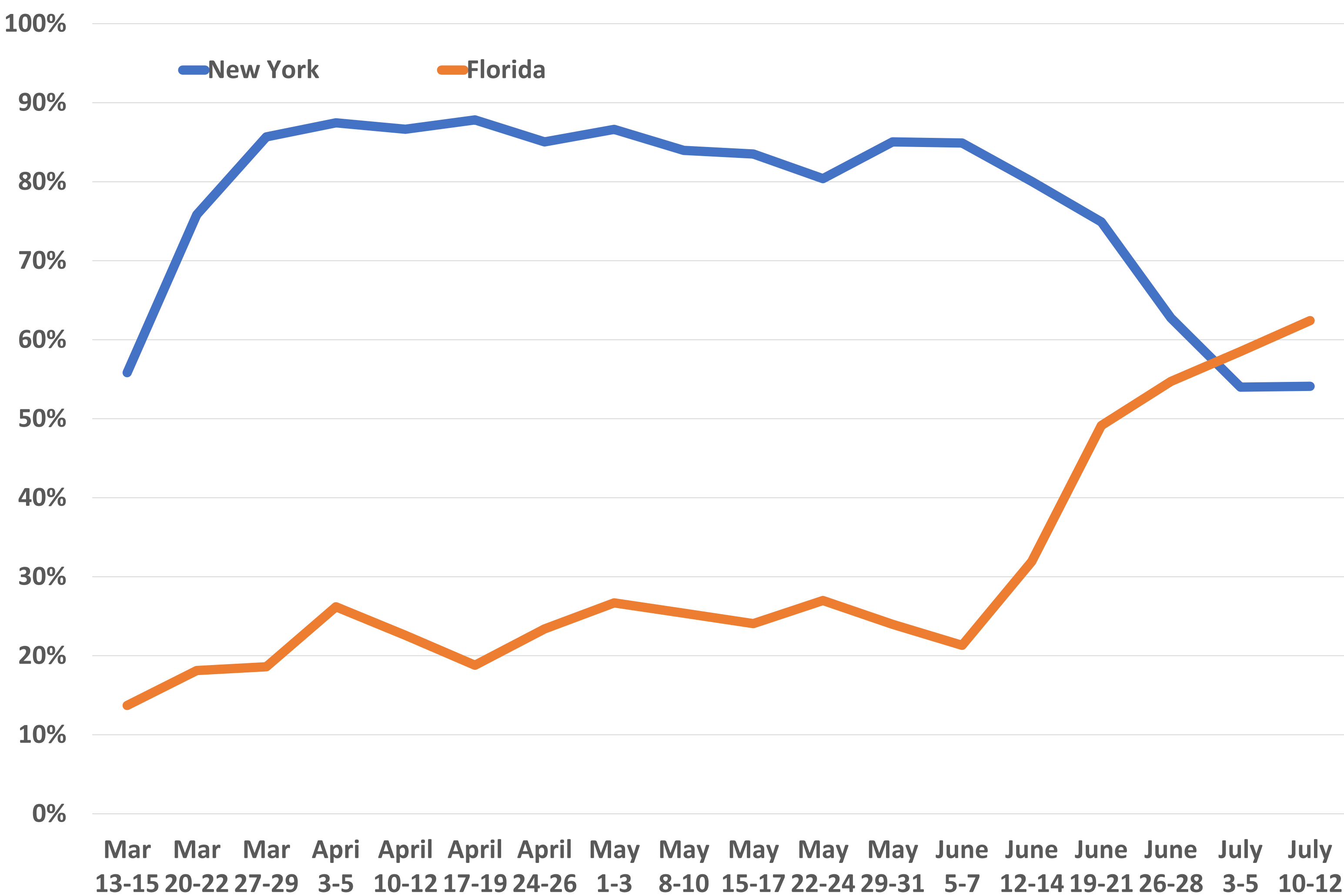




# Most Talked About Coronavirus Hotspots: Top Destinations

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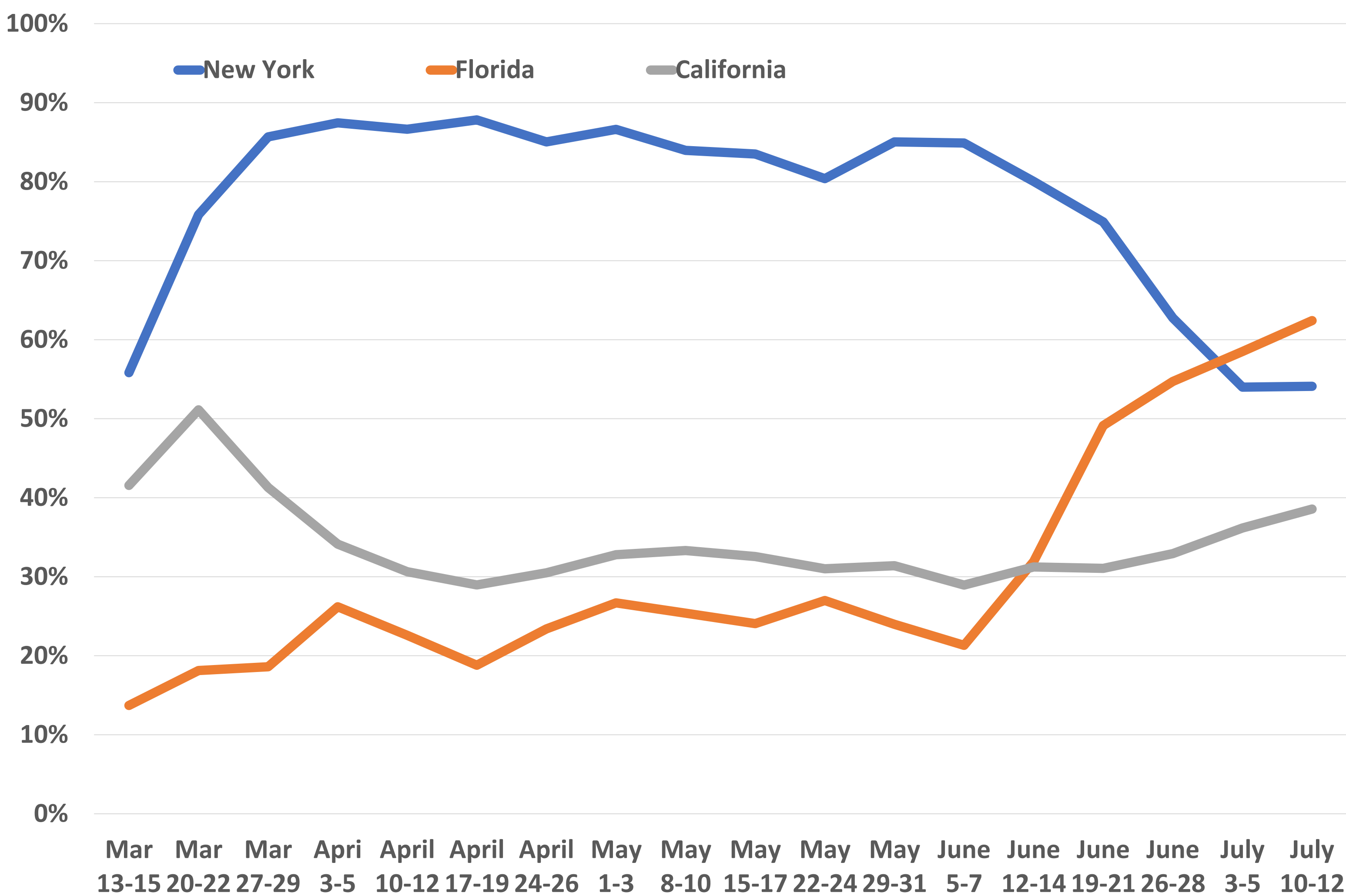
*(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)*



# Most Talked About Coronavirus Hotspots: Top Destinations

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

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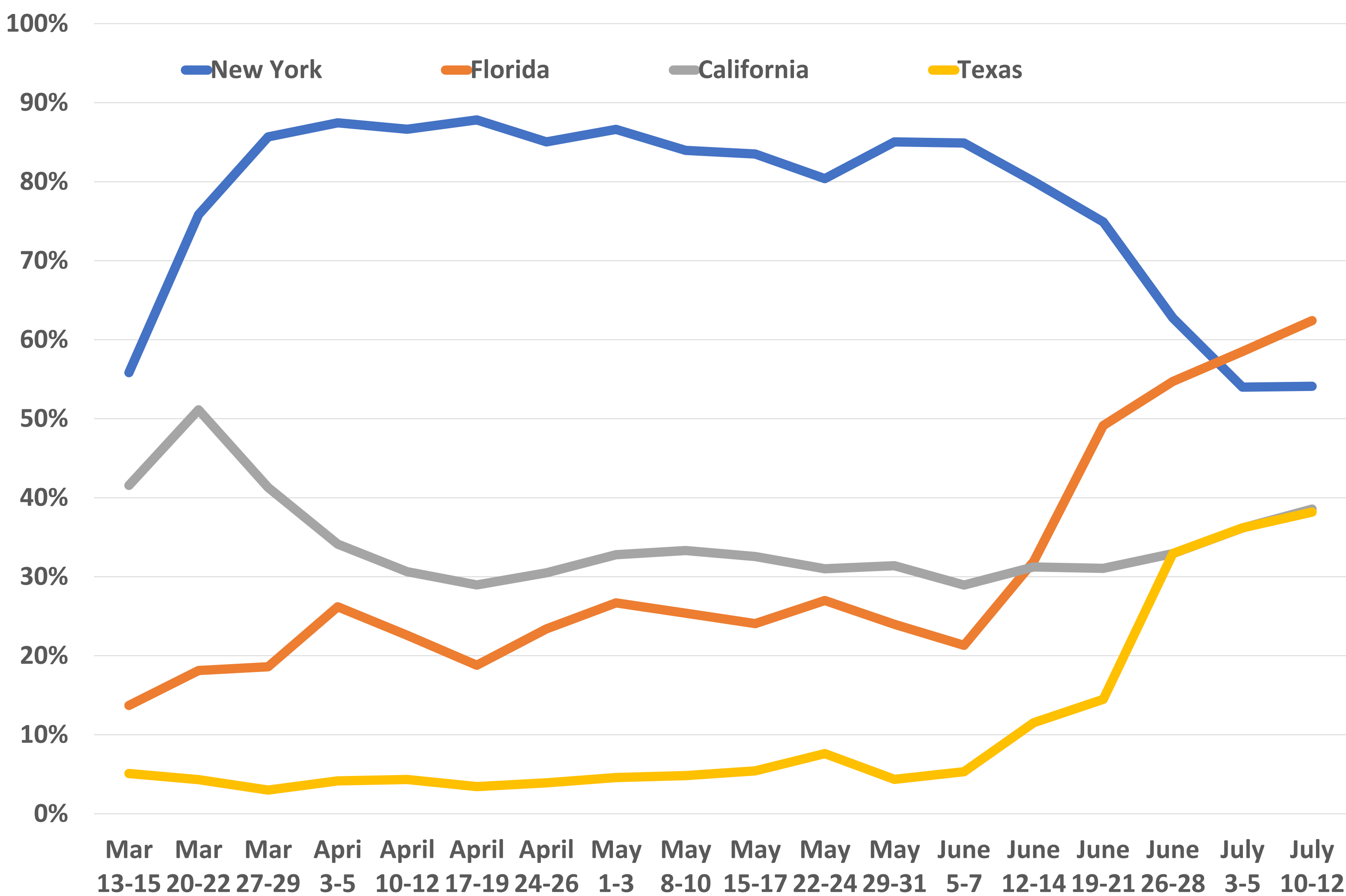




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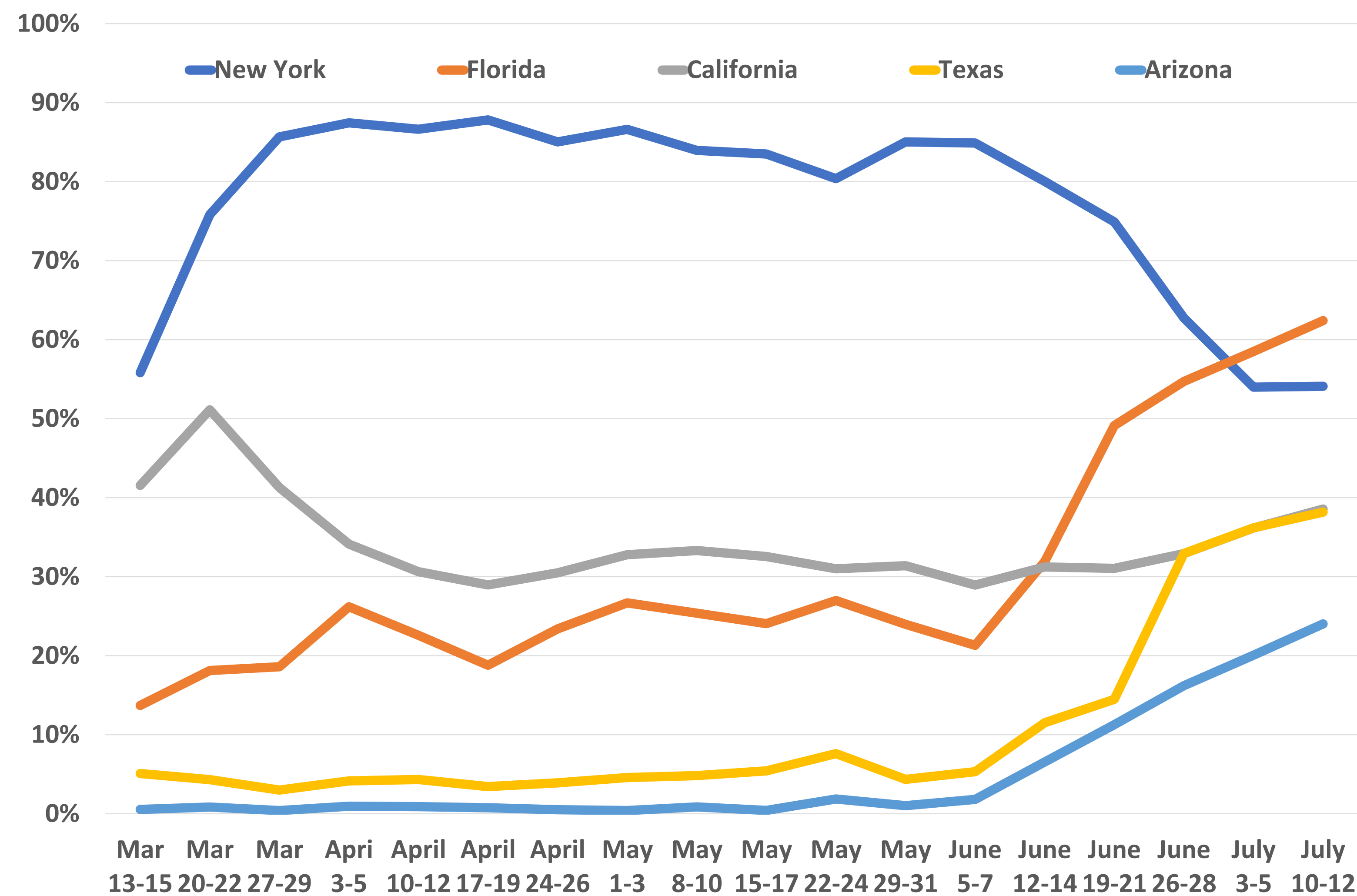
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# Most Talked About Coronavirus Hotspots: Top Destinations

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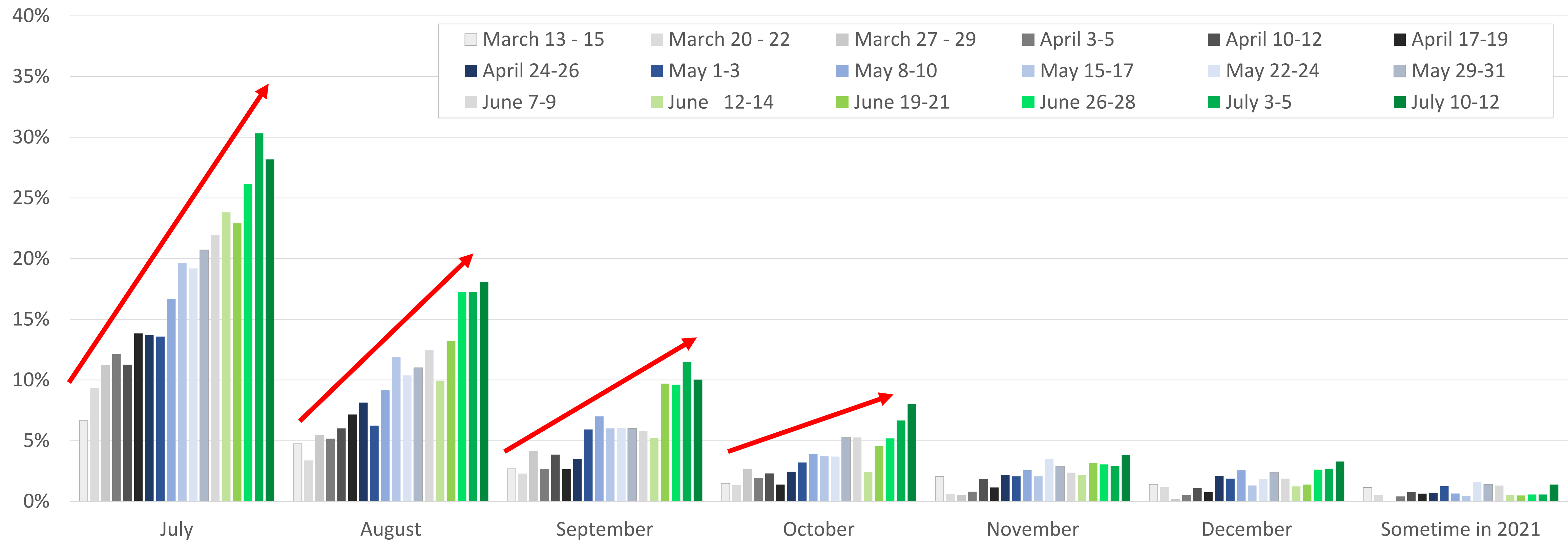
*(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)*





# Month of Trip Cancellation

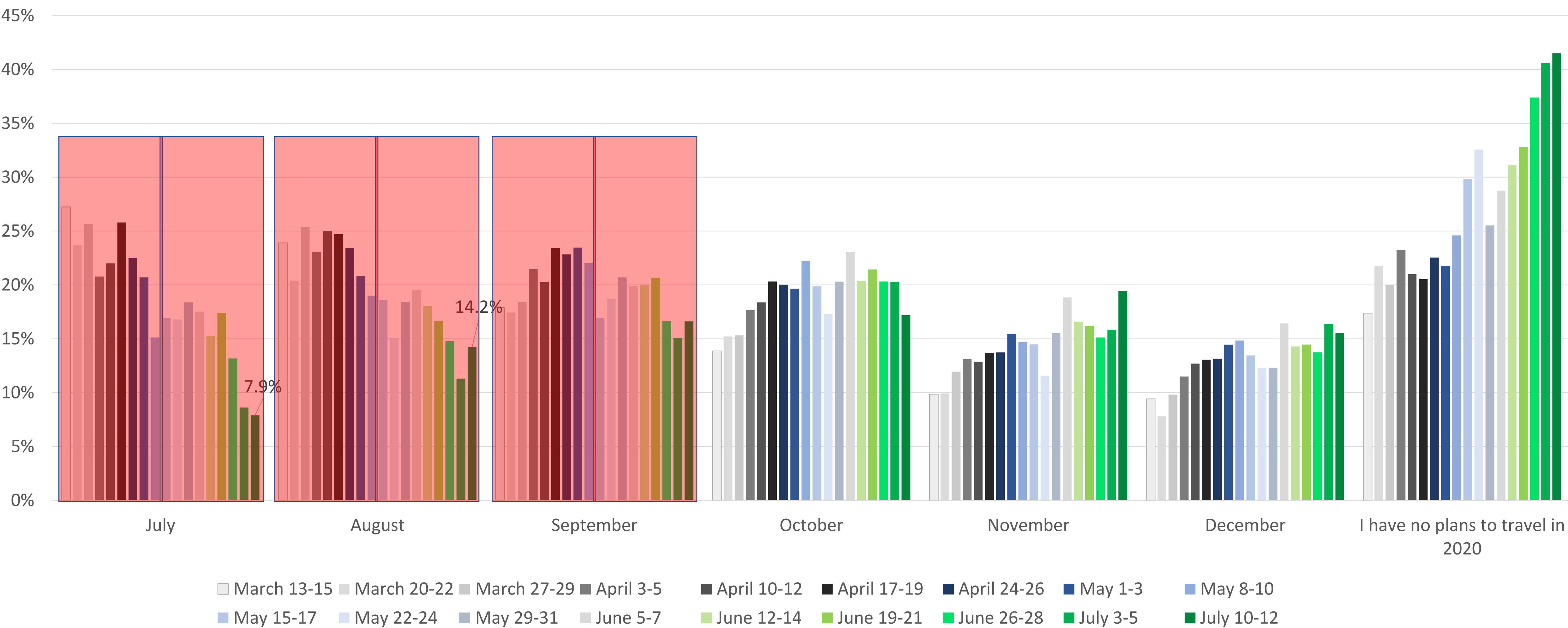
**Question:** The trip(s) you CANCELED would have taken place in which months? (Select all that apply)



(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728 and 675 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

# Upcoming Travel Plans

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



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 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 and 10-12, 2020)



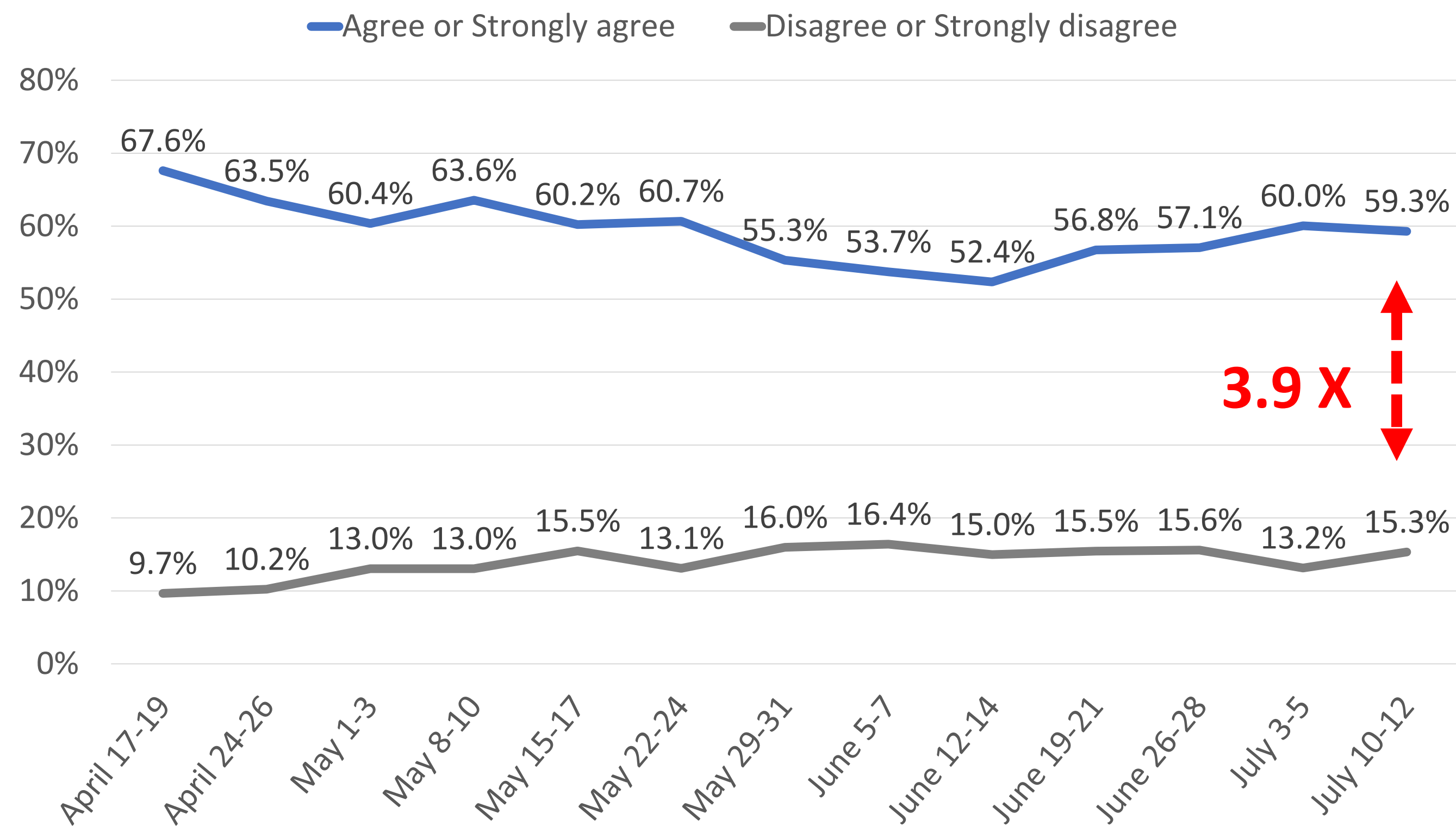
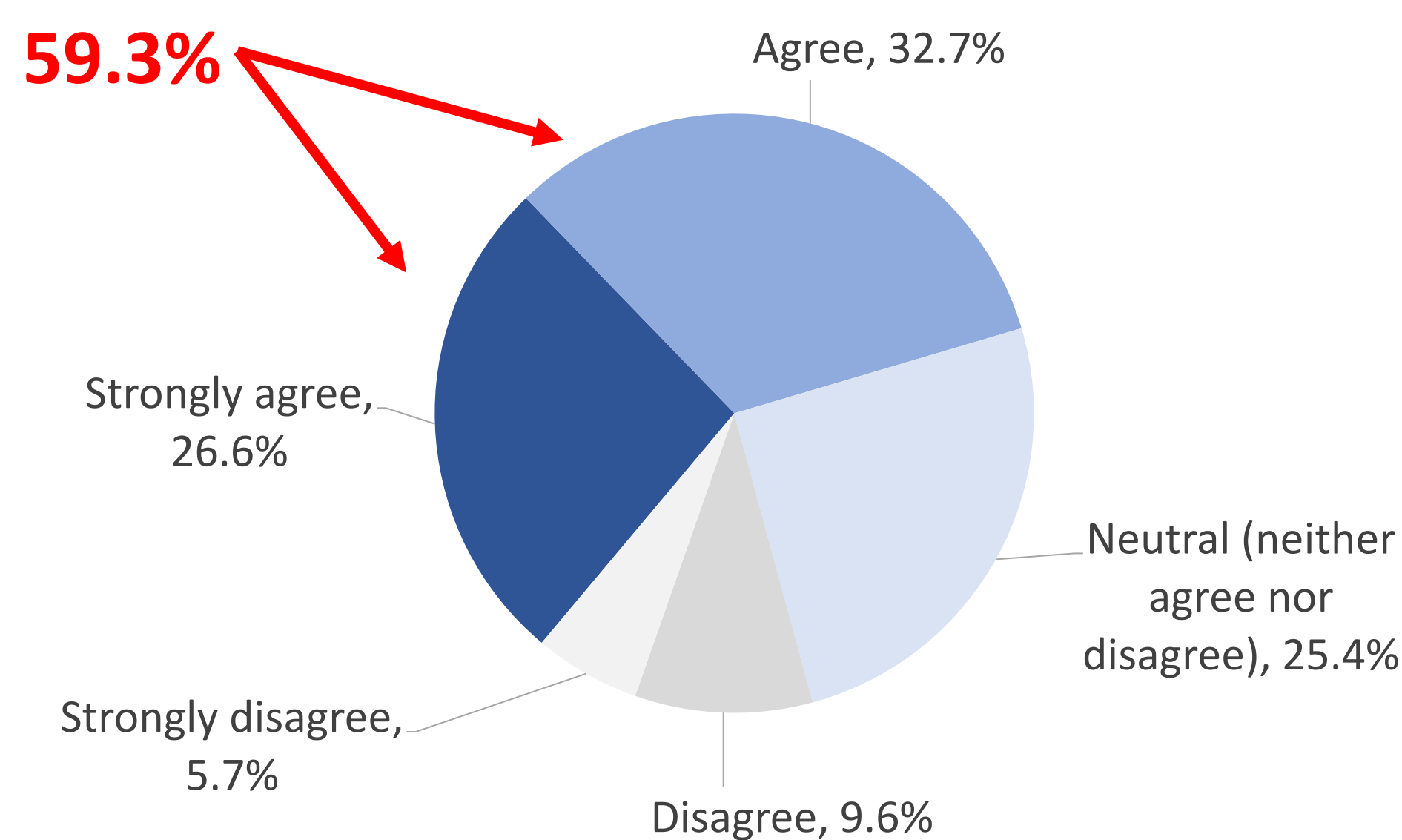


# How We're Feeling in Our Communities

# Travelers in Community are Unwanted

How much do you agree with the following statement?

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



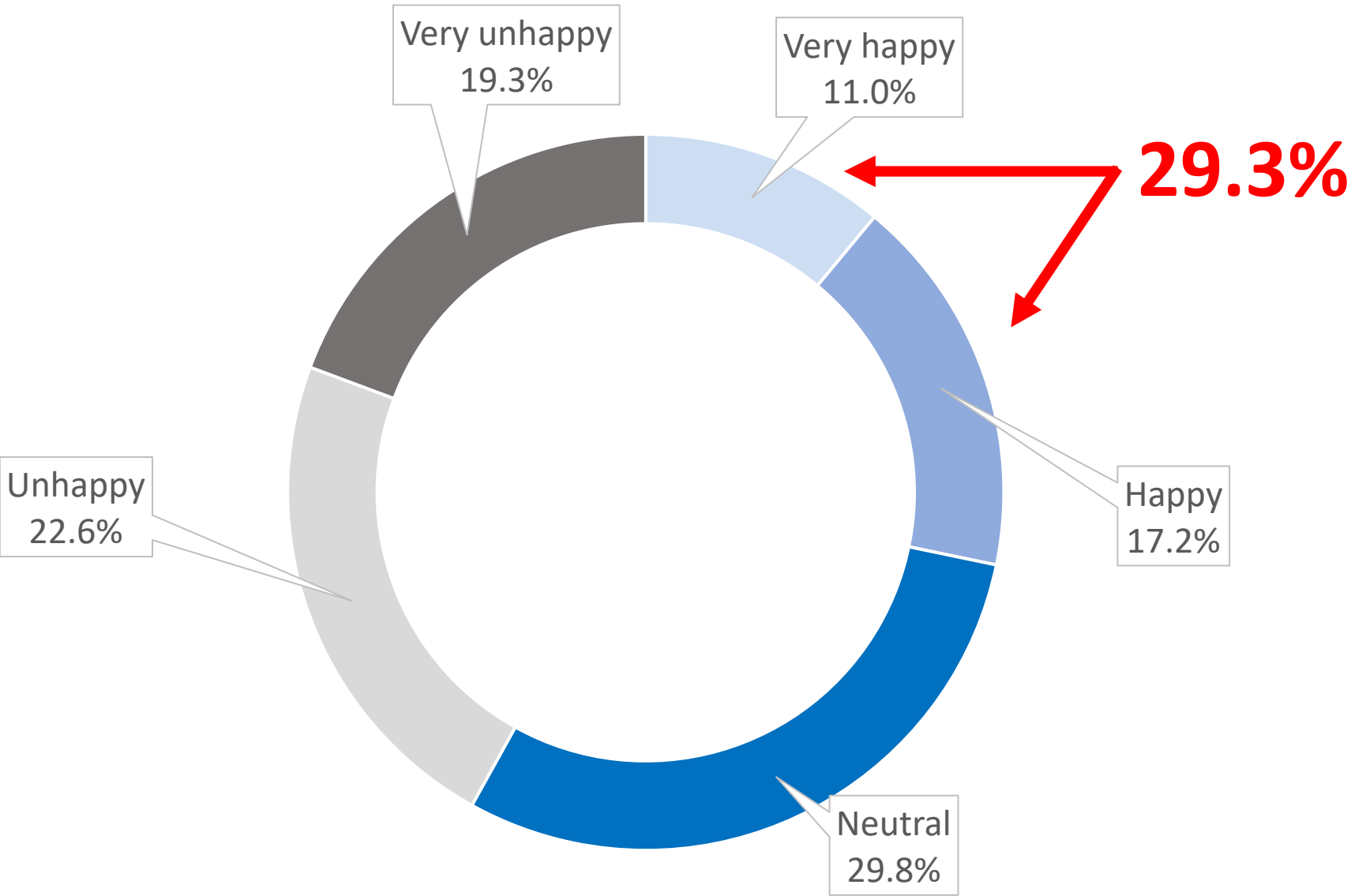
(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 , July 3-5 and 10-12, 2020)



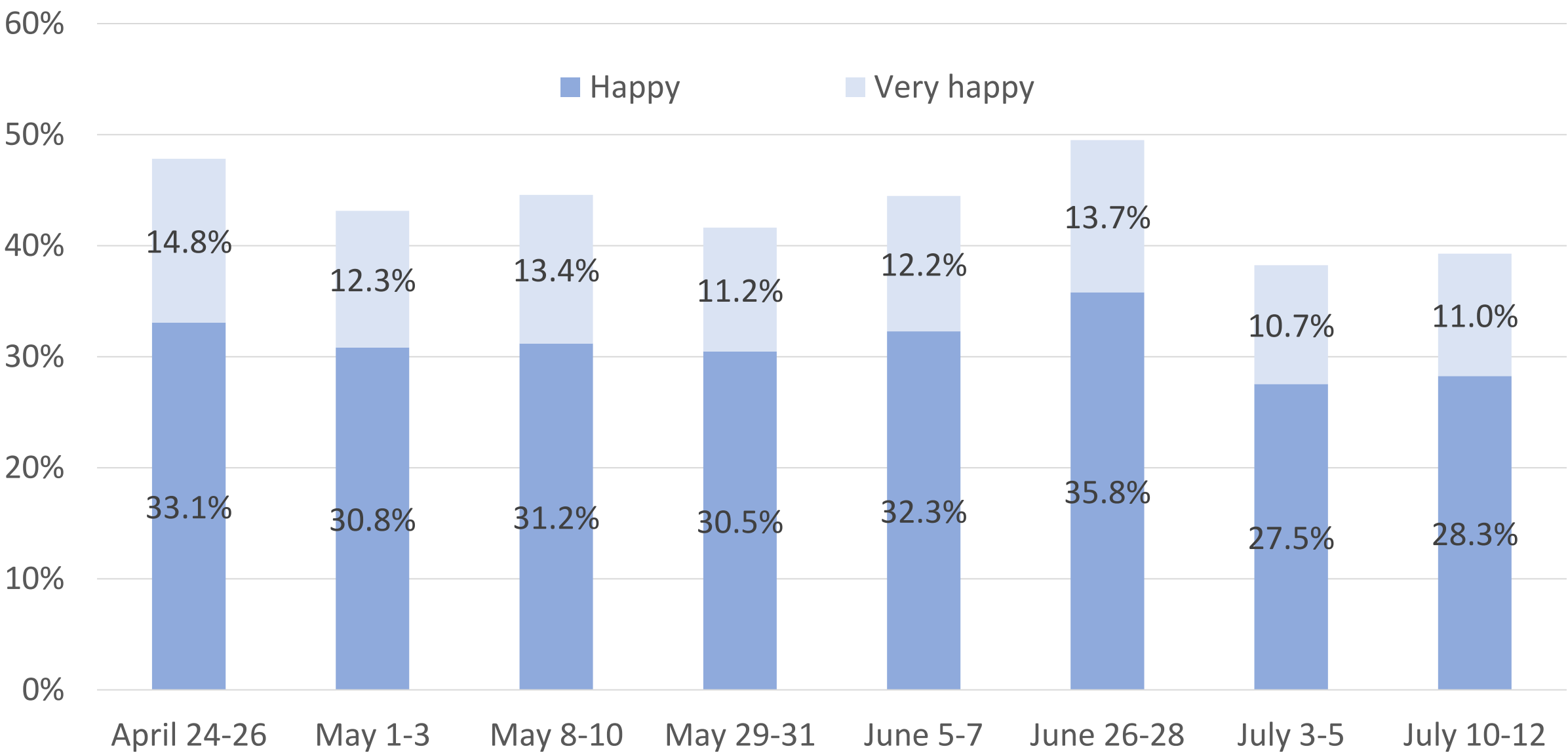
# Advertising Their Own Communities

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

Wave 18 (July 10-12)



Historical data

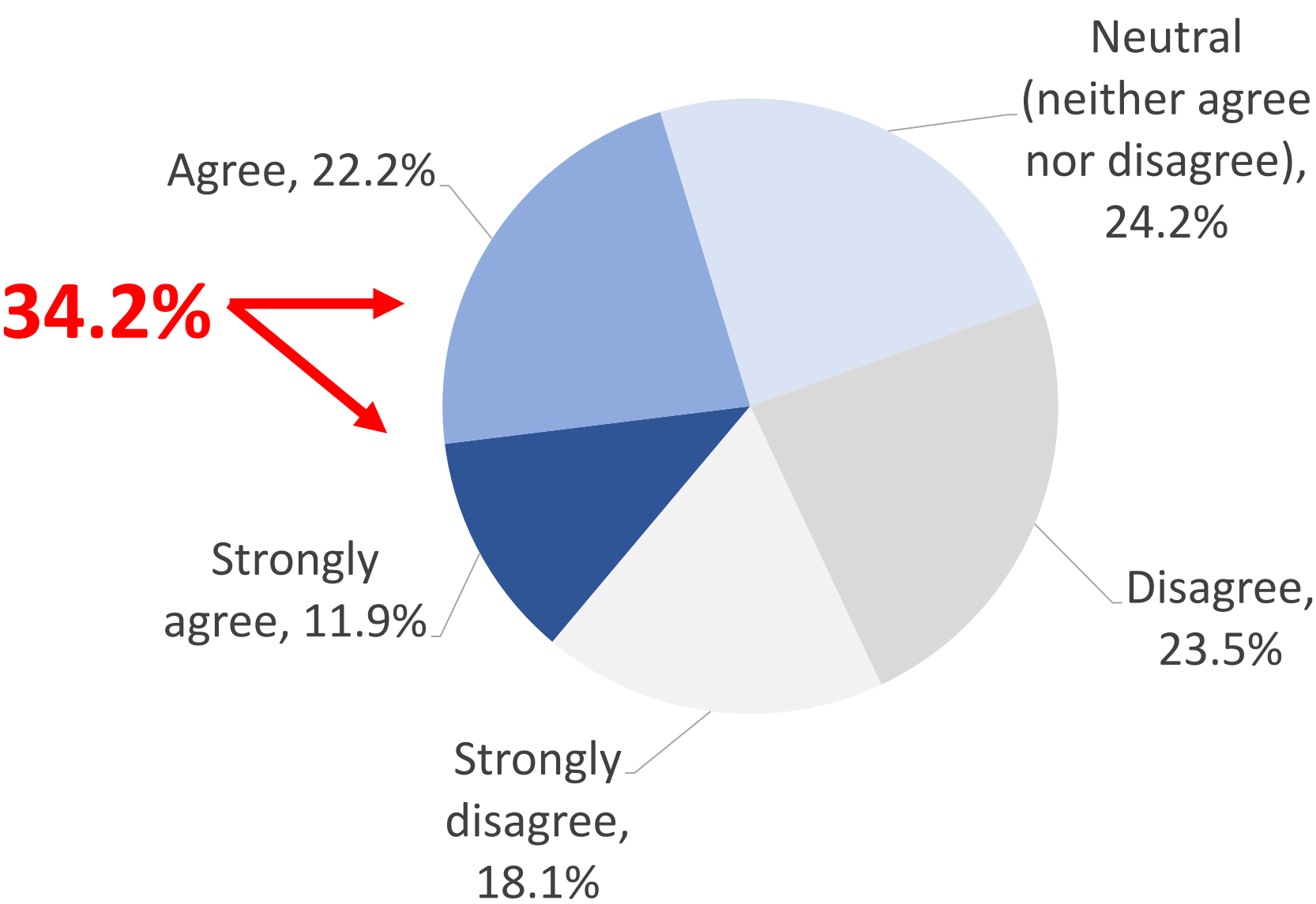


(Base: All respondents, 1,198, 1,199, 1,195, 1,250, 1,203, 1,231, 1,365 and 1,213 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28, July 3-5 and 10-12, 2020)

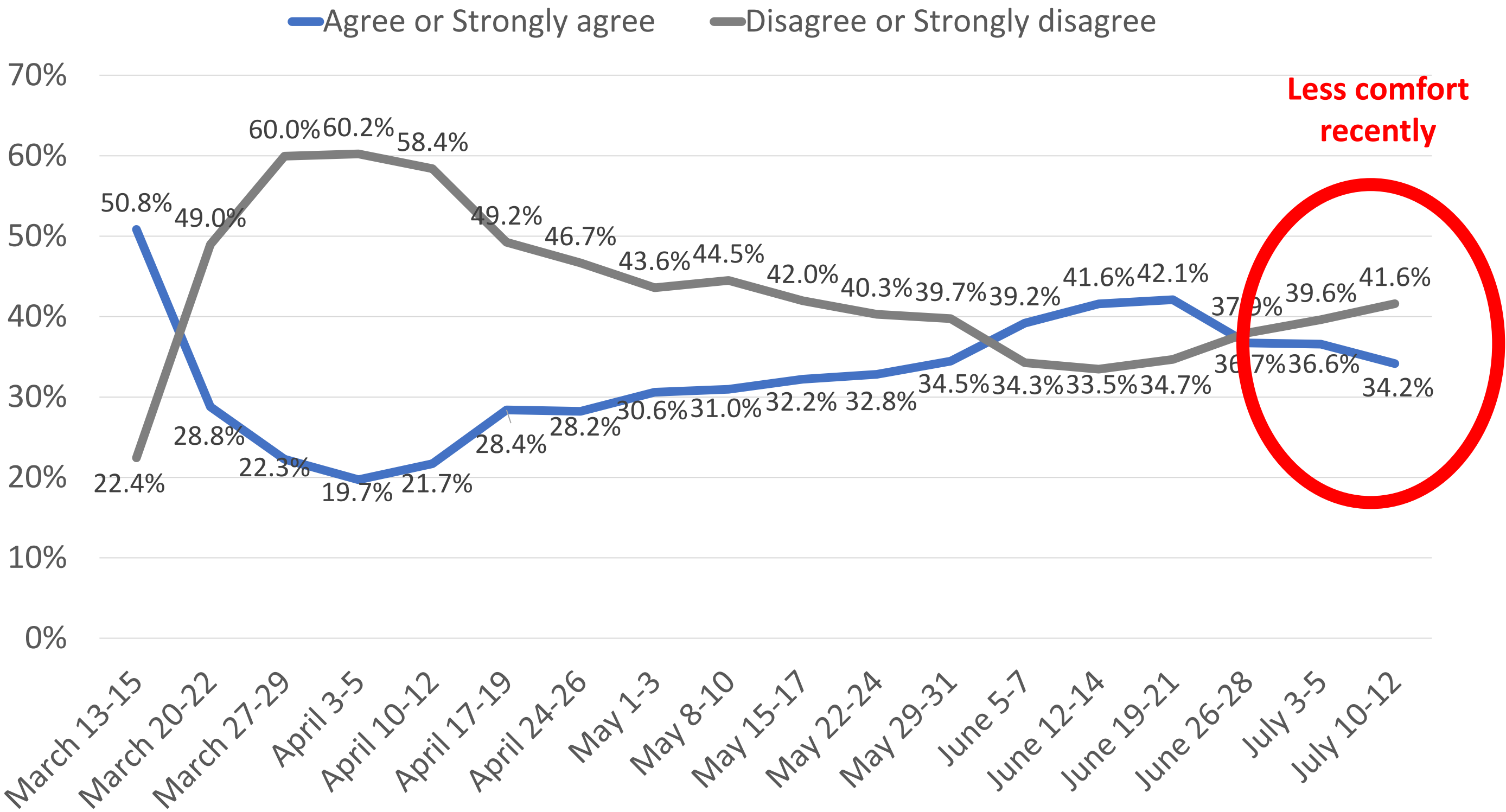
# Comfort Enjoying Home Community

How much do you agree with the following statement?

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



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 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 and 10-12, 2020)

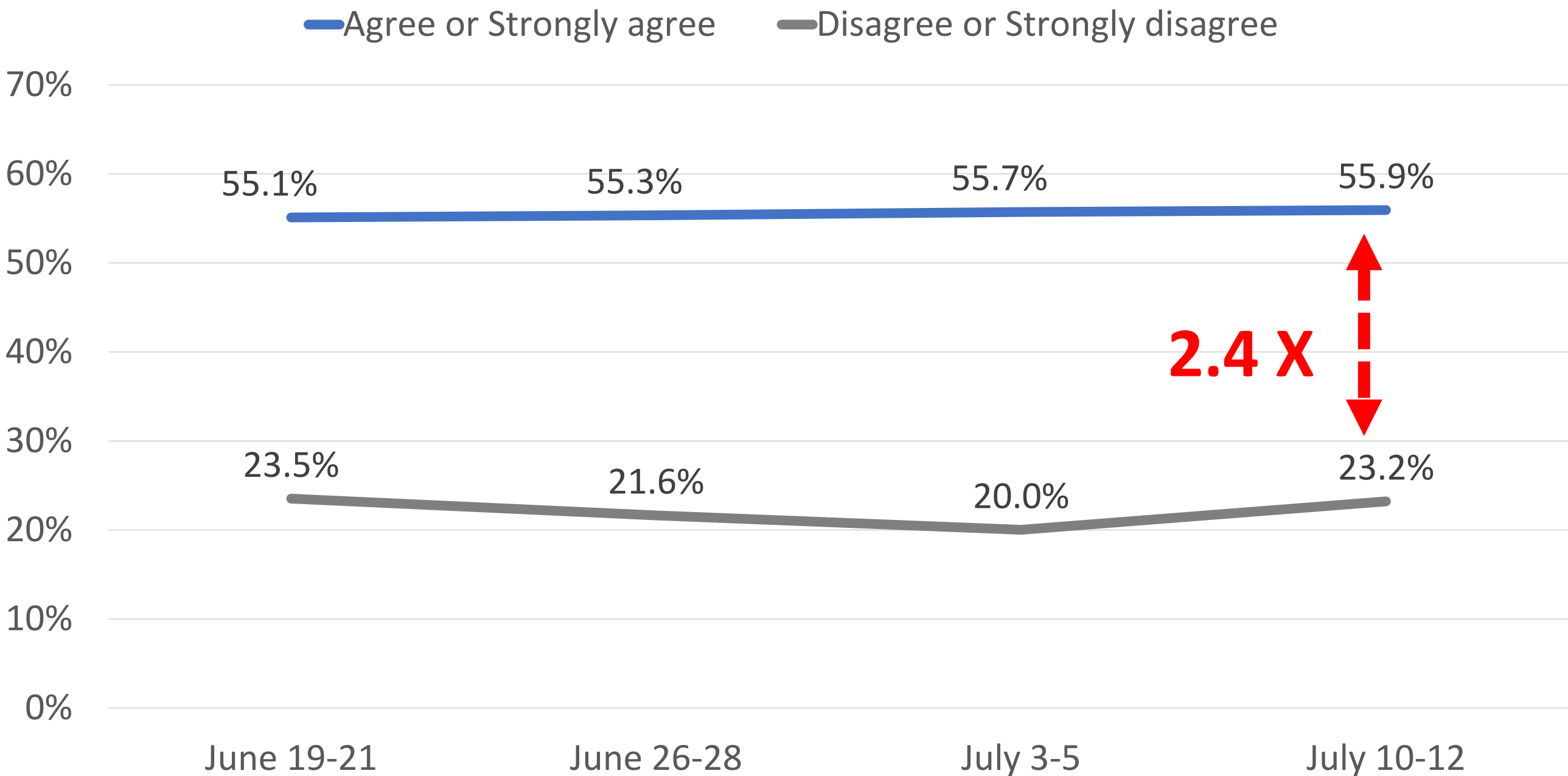
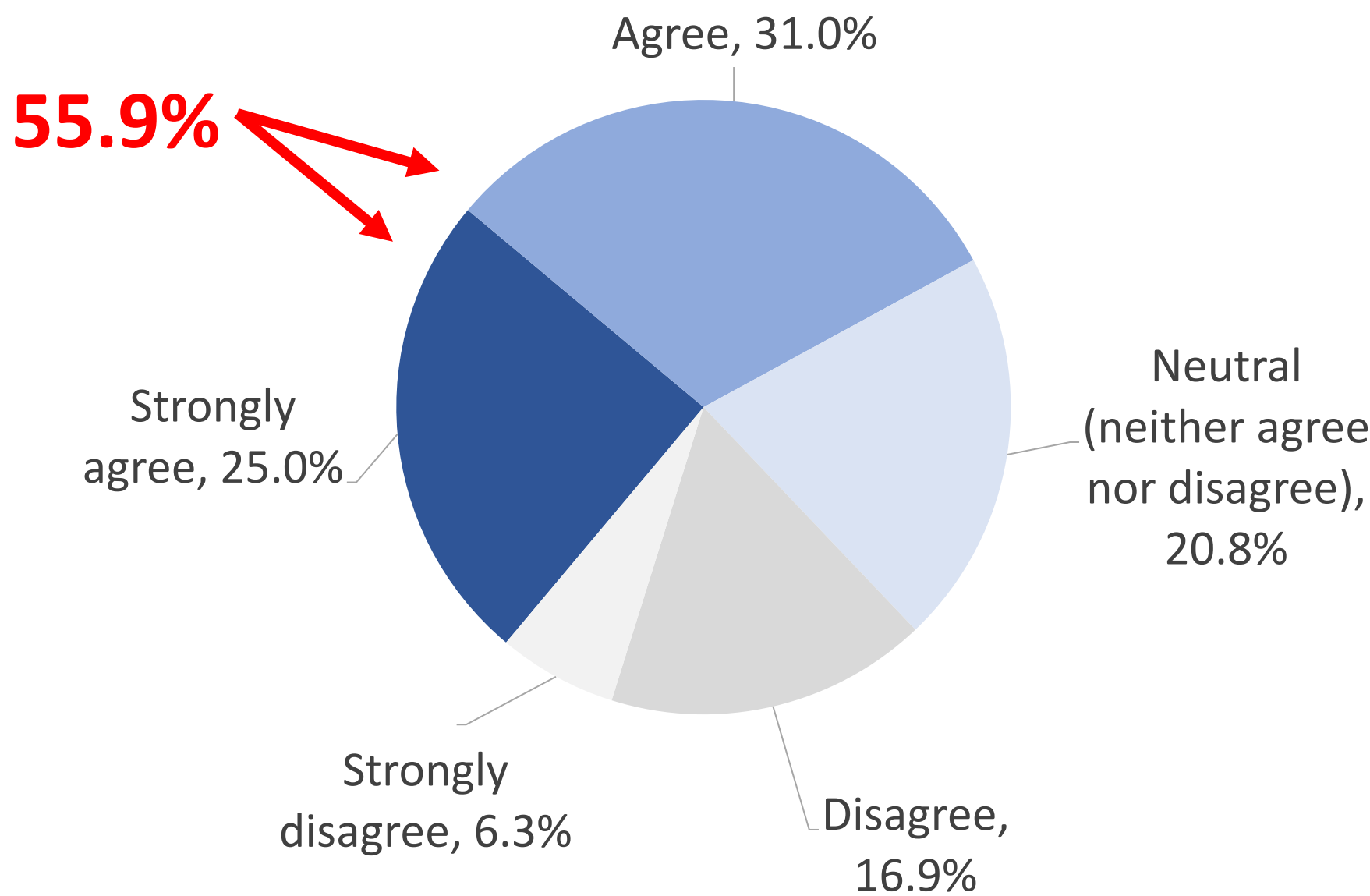




# Community Face Mask Wearing

How much do you agree with the following statement?

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

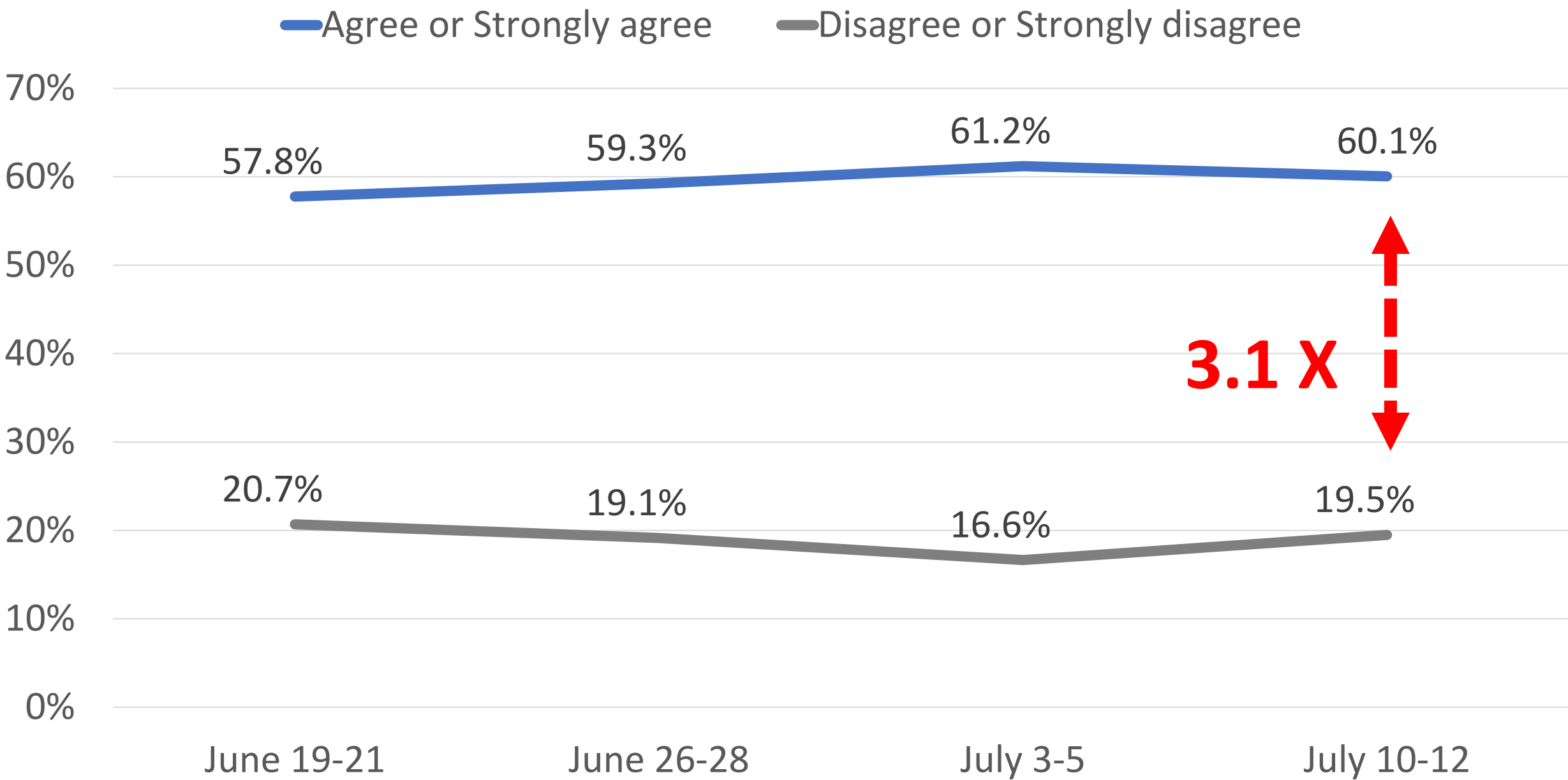
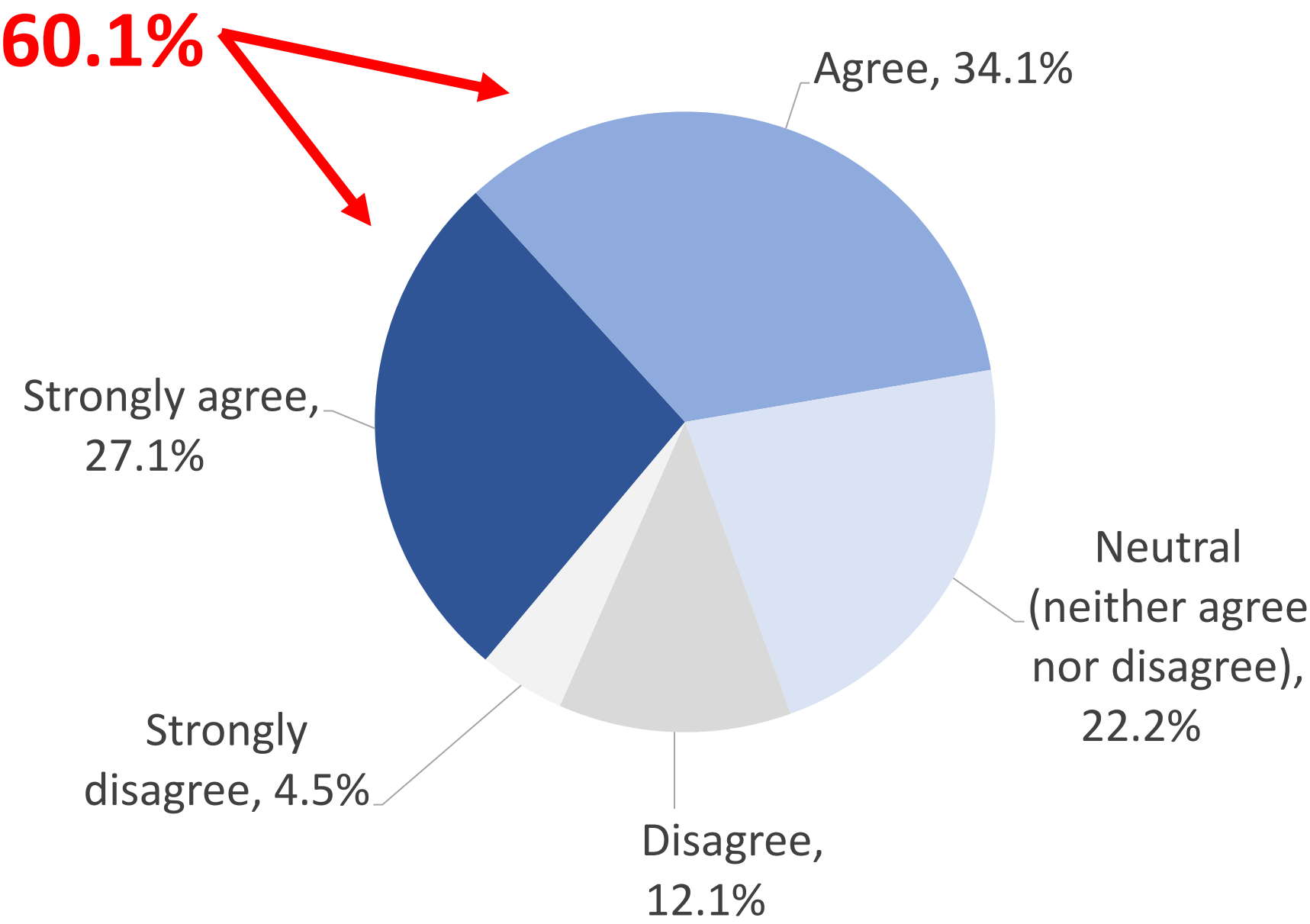


(Base: All respondents, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected June 19-21, 26-28, July 3-5 and 10-12, 2020)

# Community Social Distancing

How much do you agree with the following statement?

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



(Base: All respondents, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected June 19-21, 26-28, July 3-5 and 10-12, 2020)

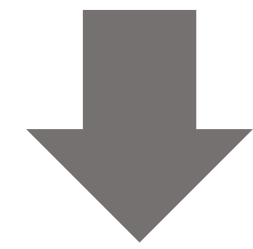




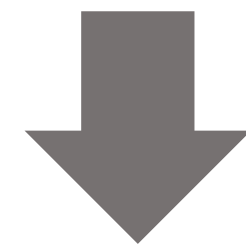
# The Pandemic's Interference with Travel Priorities



**List of travel activities & emotions**



**How important is each?**



**How has the pandemic affected their  
ability to pursue each?**





# Travel Experience Priorities

**Question:** Tell us about your TYPICAL PRIORITIES when traveling for leisure. However you personally define each, use the scale provided to indicate how important each is to you when traveling for leisure.

*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*

Top 2 Box Score: Critical importance or High Importance



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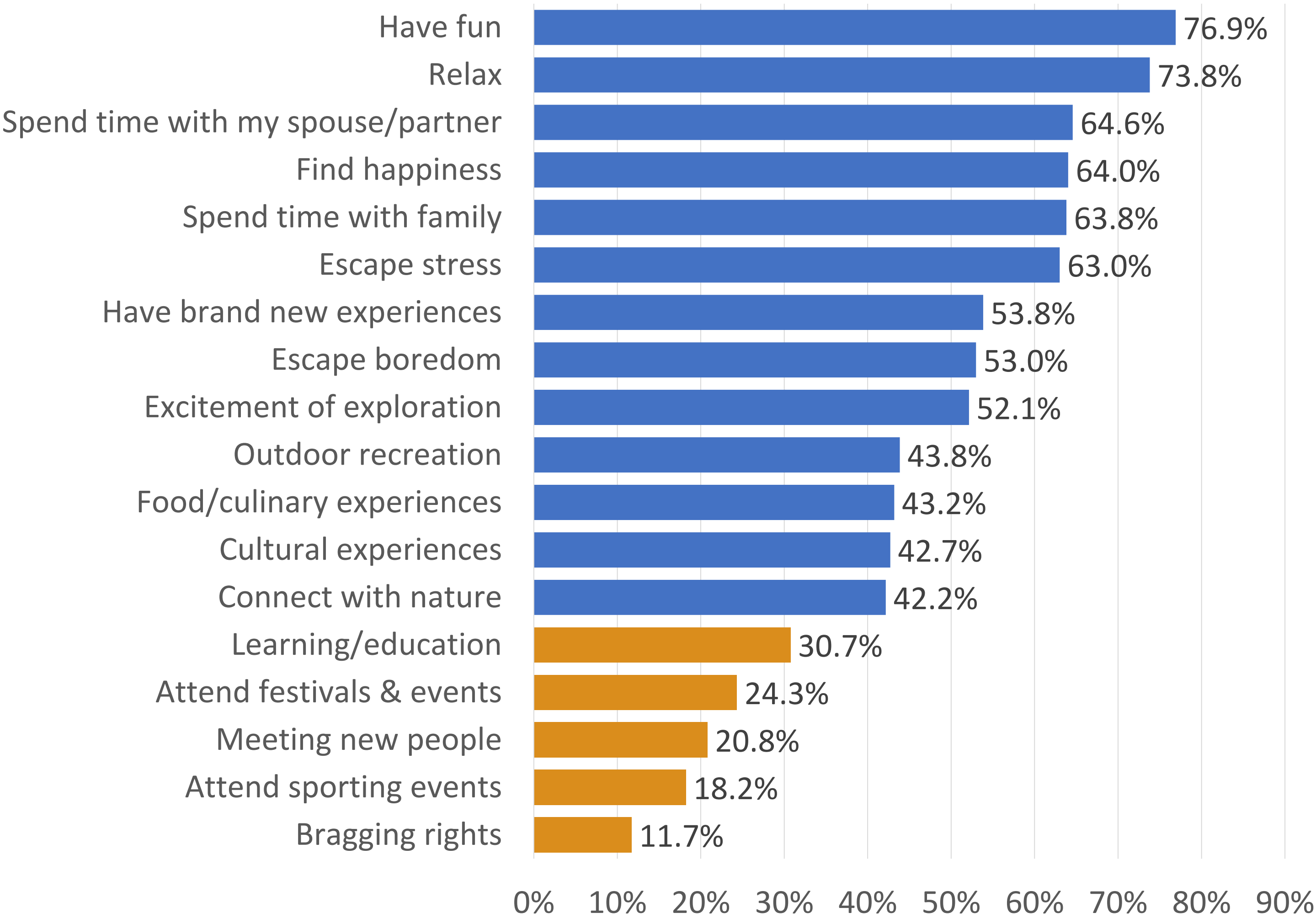


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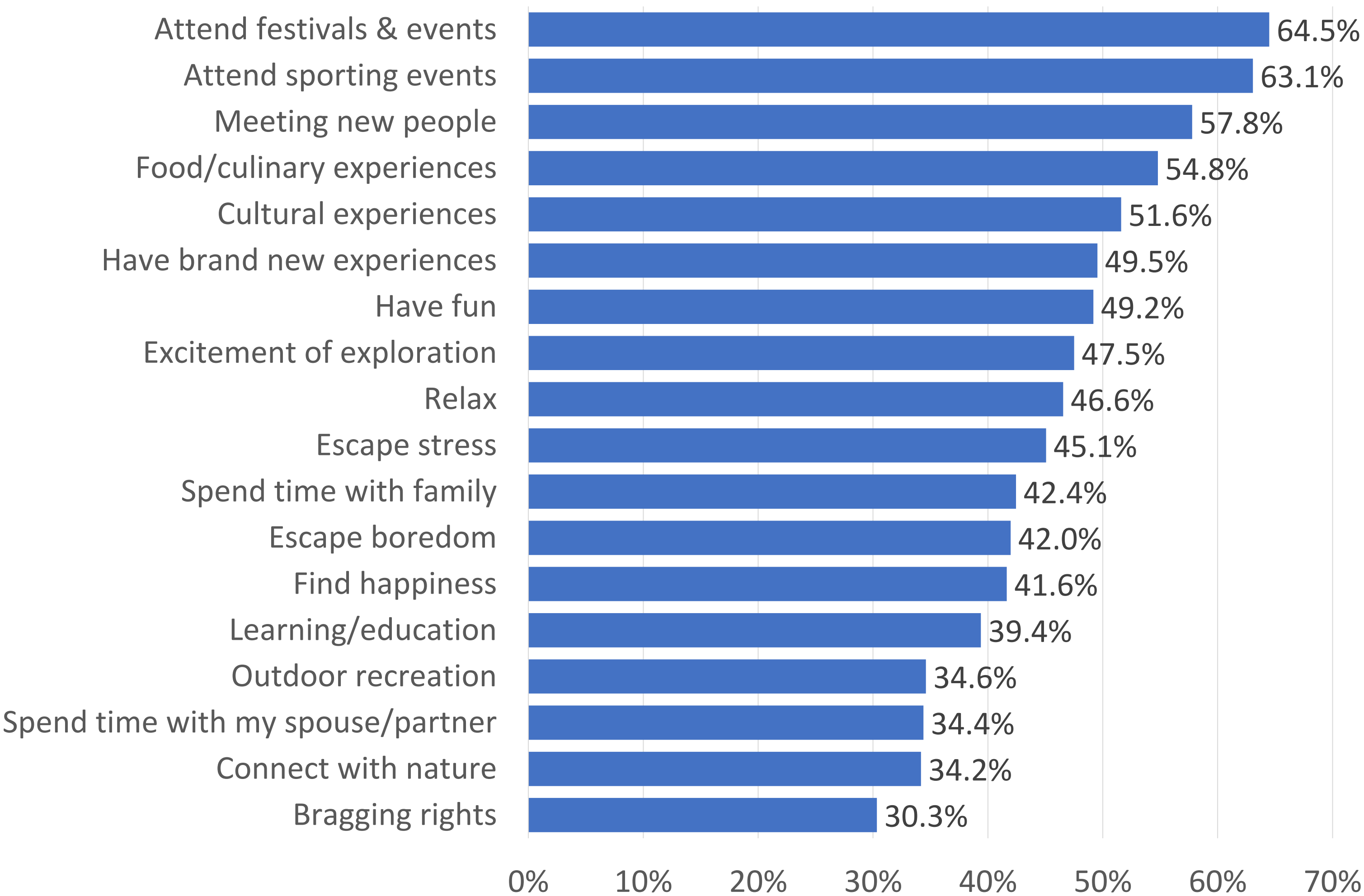
# Covid-19's Impact on Ability to Experience Travel Priorities

**Question:** If you were planning a leisure trip for later this year, how much of an effect do you feel the Coronavirus situation would have on your ability to pursue each?

(Select the one that describes the Coronavirus' impact on your ability to do each.)

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

*Top 2 Box Score: Significant Effect or Makes Impossible*





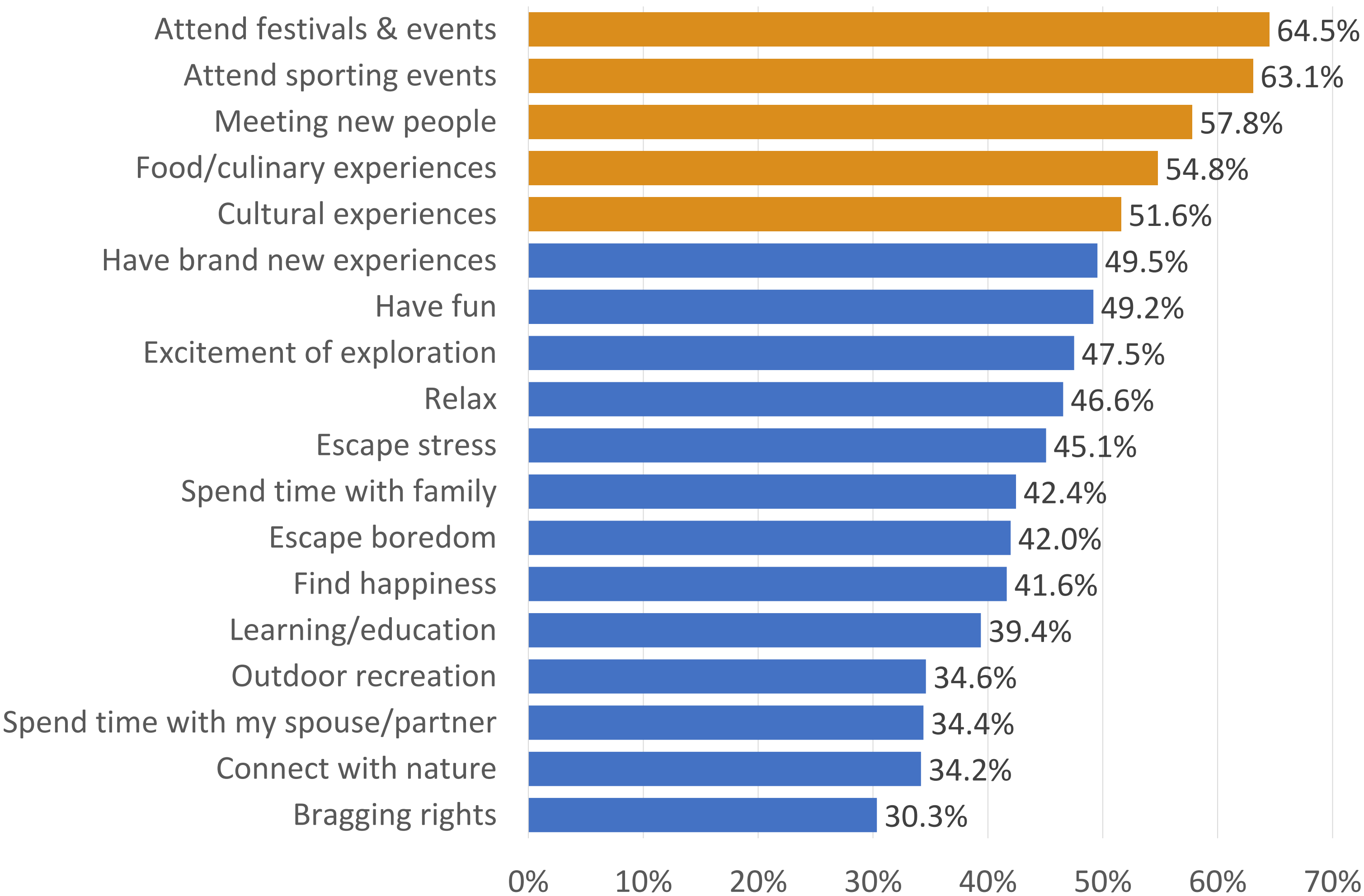
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Top 2 Box Score: Significant Effect or Makes Impossible



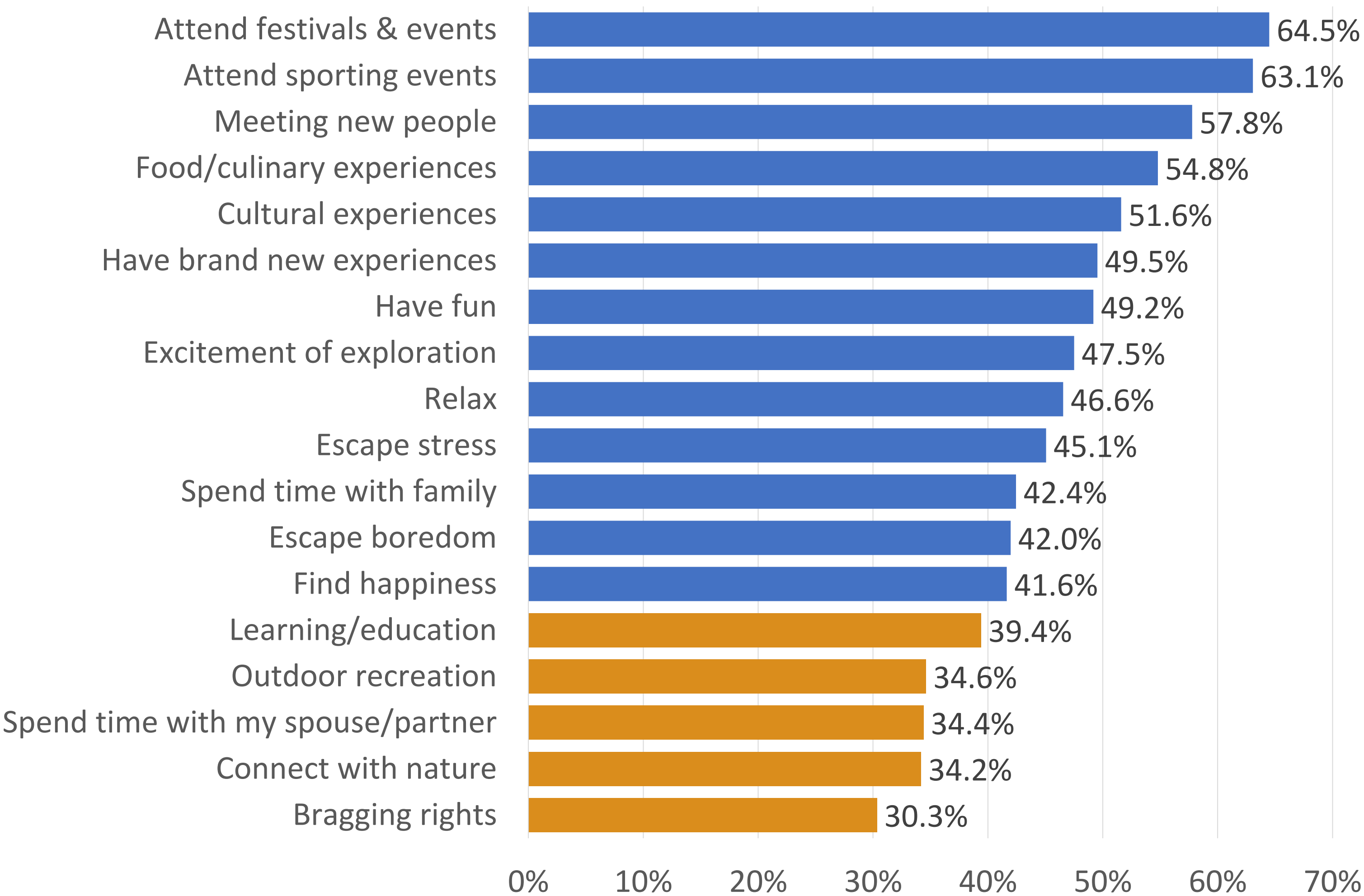
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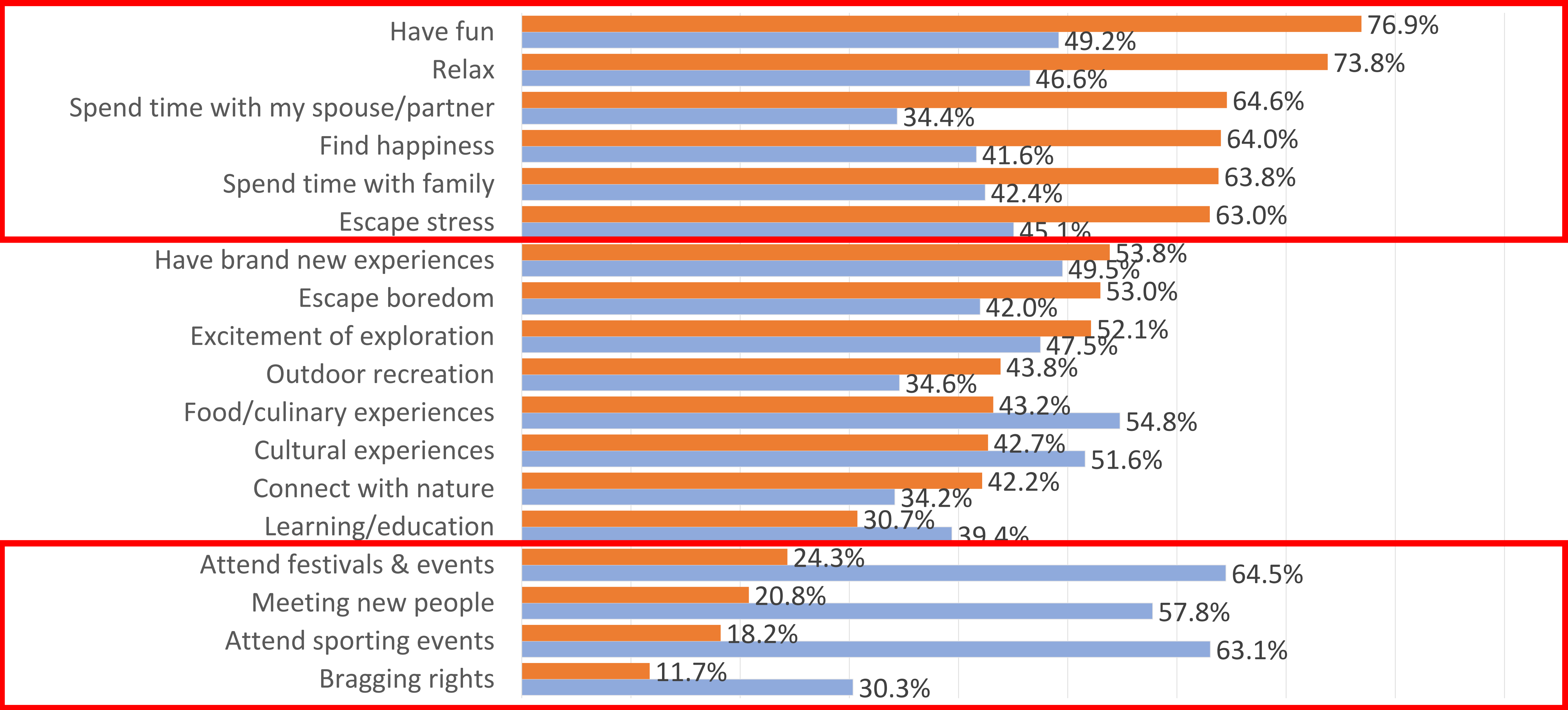
*(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)*

Top 2 Box Score: Significant Effect or Makes Impossible





# Priorities vs. Covid-19's Impact







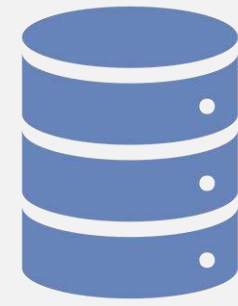
# Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

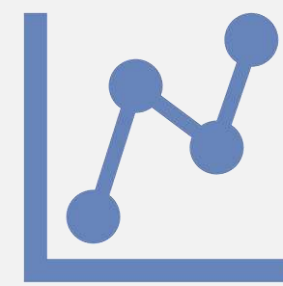
Highlights from the Week of July 12th



# What is a Predictive Index?



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



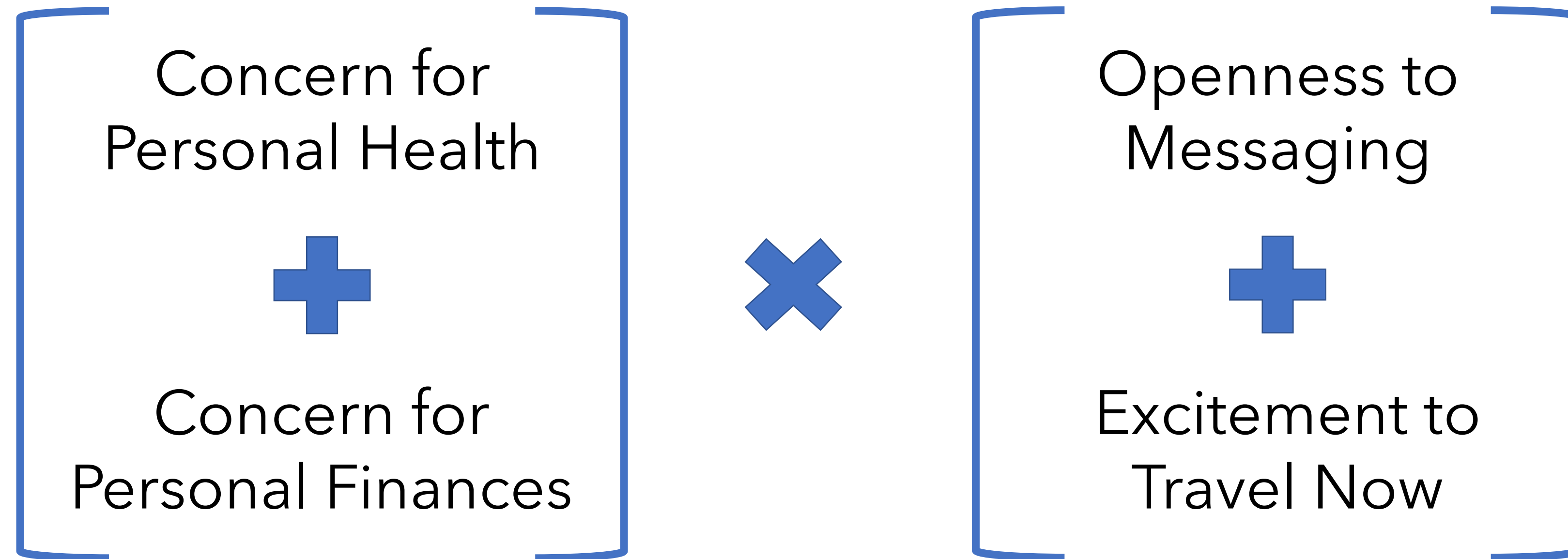
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

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

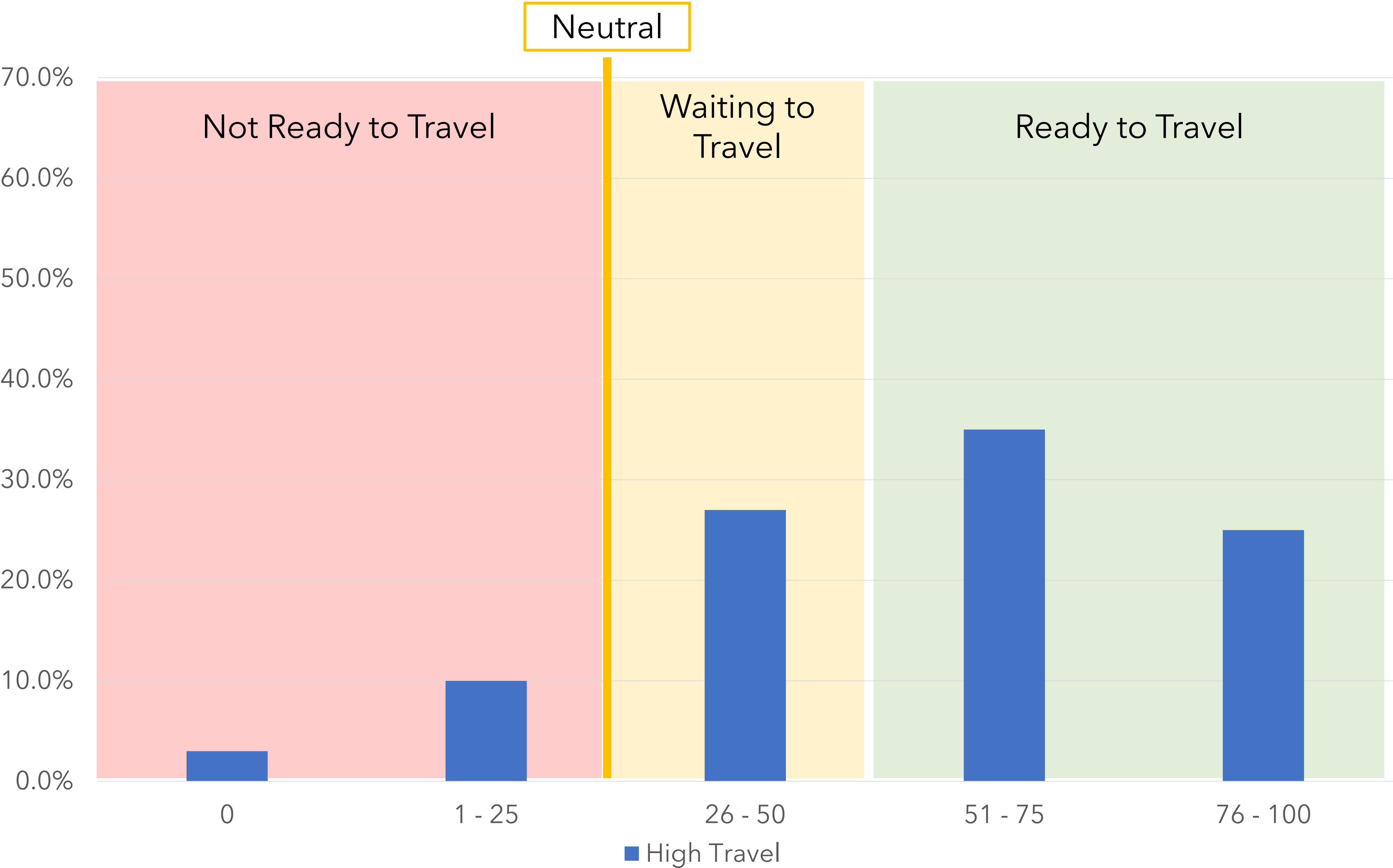
# Predictive Index Formula



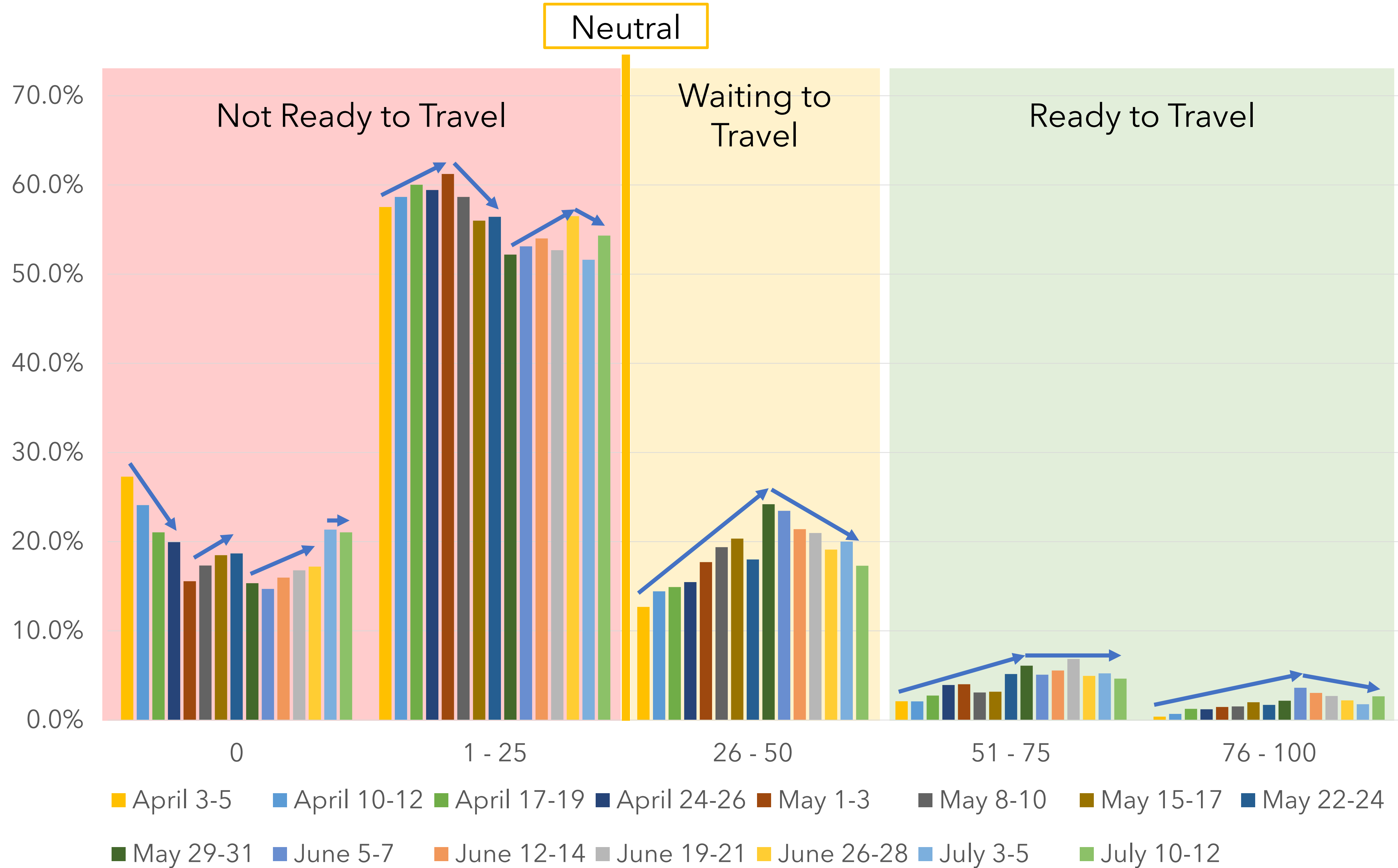
\*Normalized to a 100pt scale



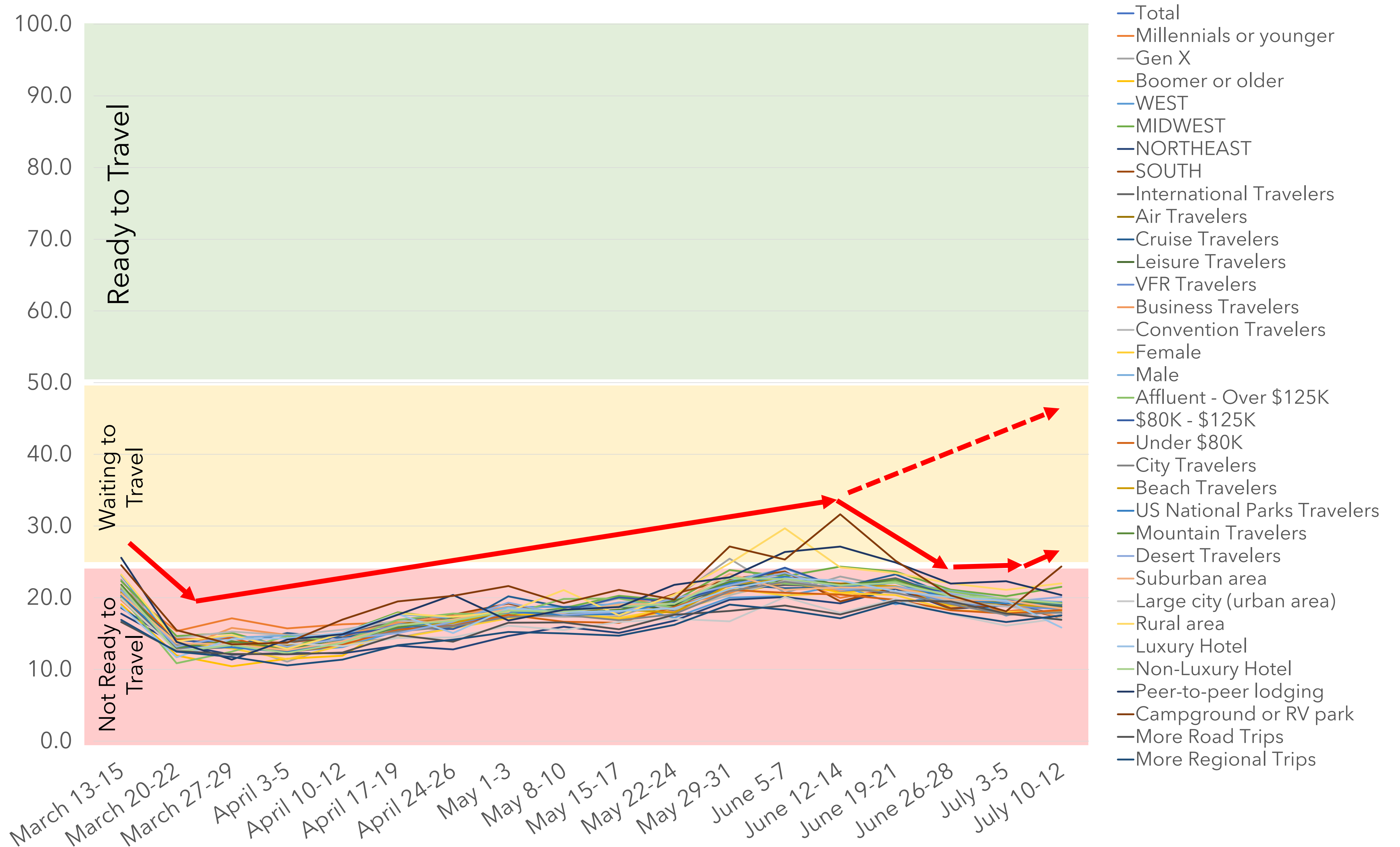
# Healthy Travel Outlook



# Travel Outlook



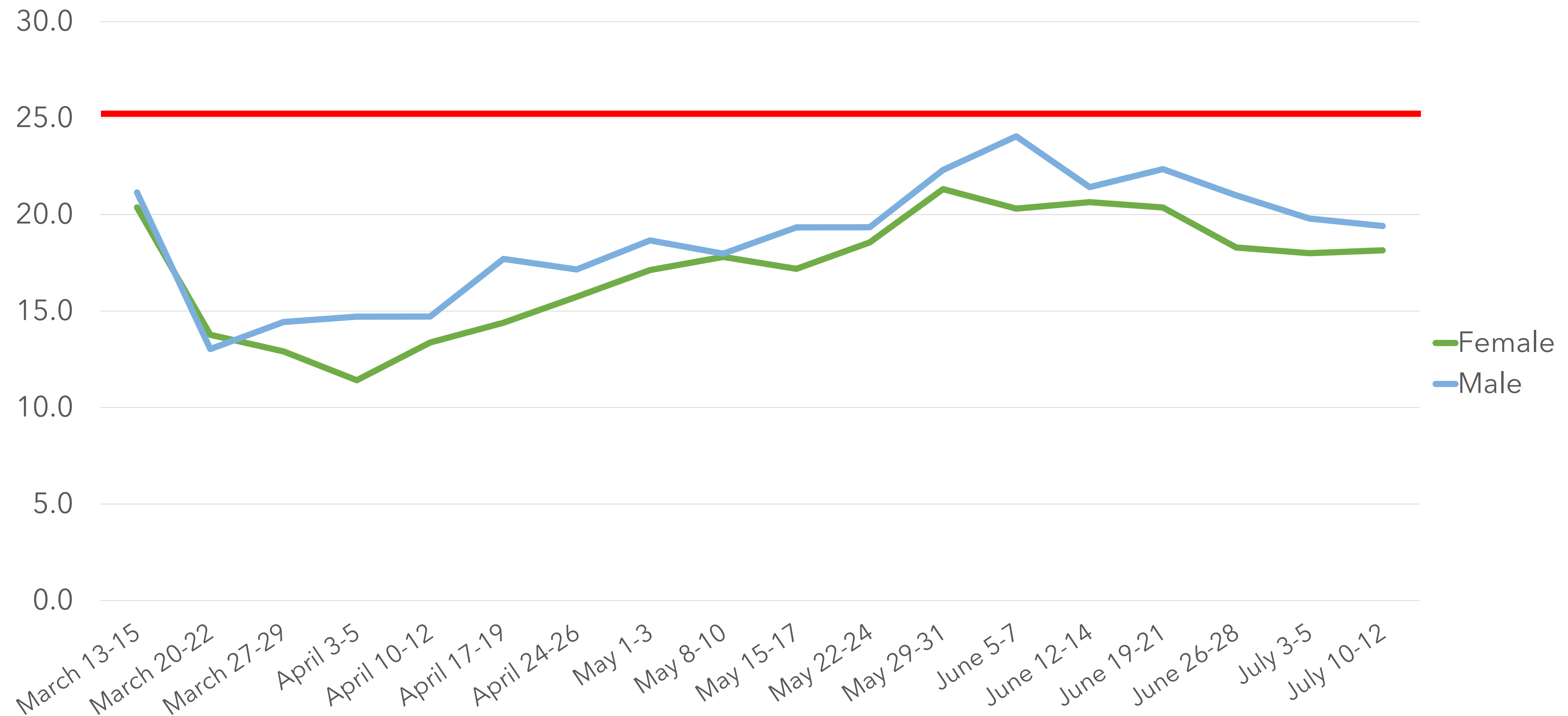




# Gender

## Points of Interest:

- Safety concerns stayed consistent for both Men and Women this week.
- This week 45.3 percent of Women reported they have no plans to travel in 2020 (up from 41.2% last week).
- About a quarter of Men again this week (23.7%) said they are already traveling or ready to travel with no hesitations (compared to 20.6% of Women).

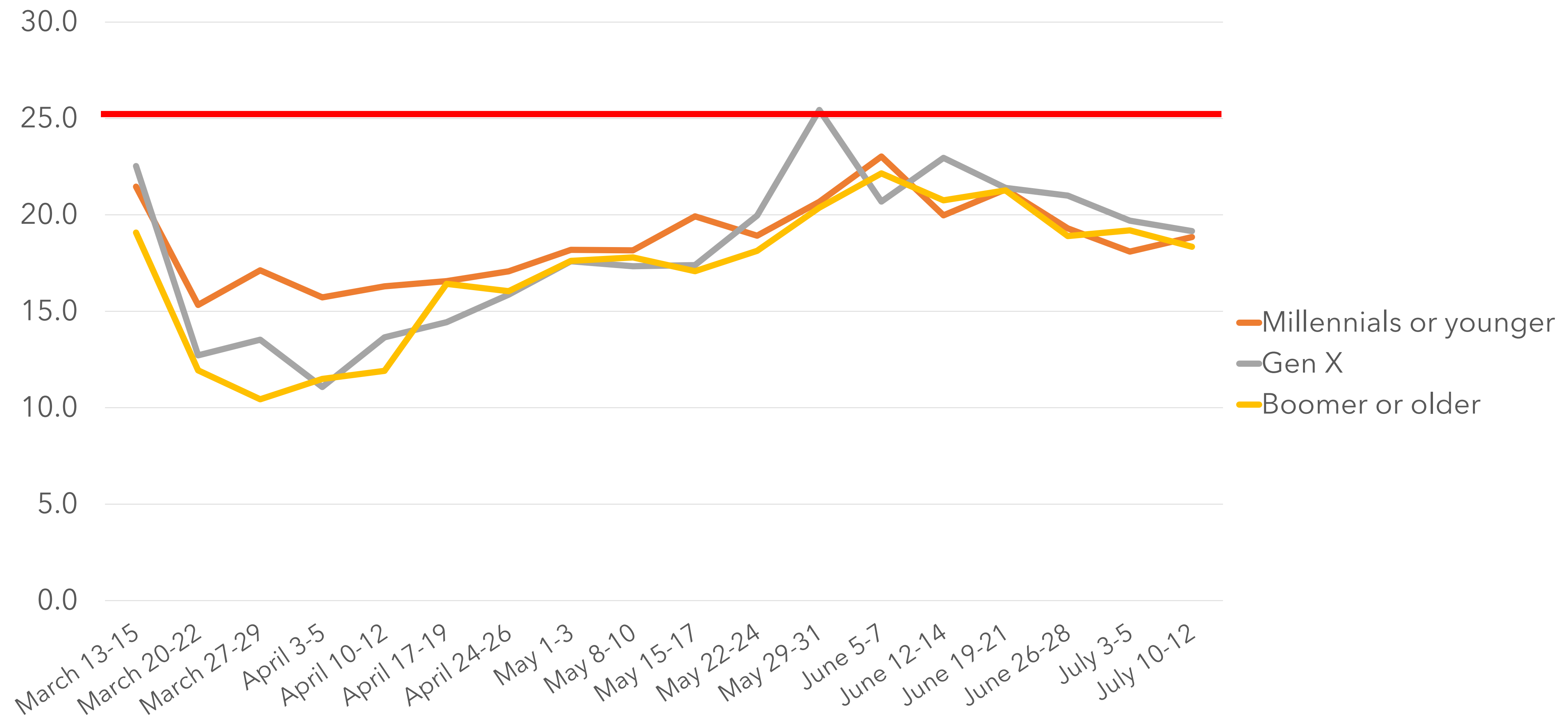




# Generation

## Points of Interest:

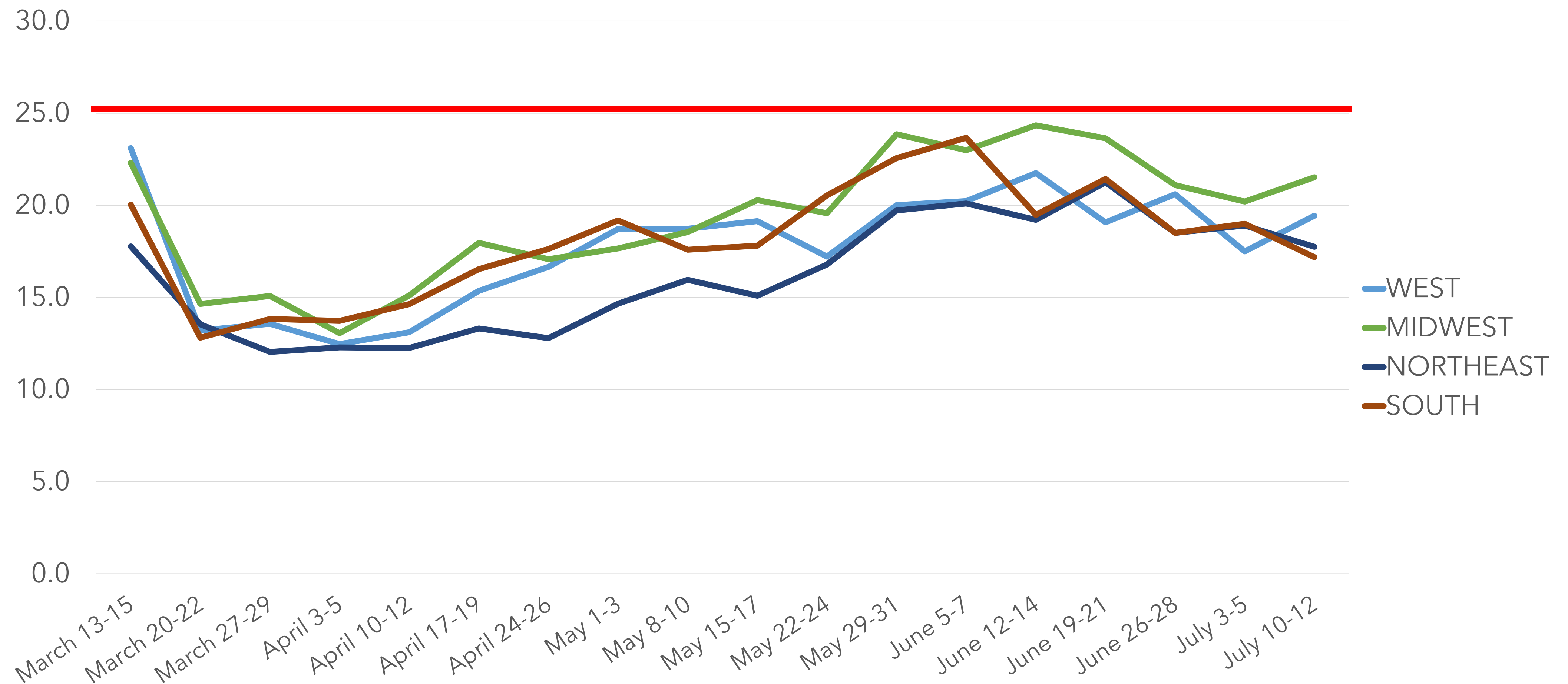
- Gen X continued to index higher than the other generations this week, but by only a small margin.
- Boomers showed a slight increase in safety concerns this week compare to the other generations.
- About a third of Millennials reported they would be Happy or Very happy to see an ad promoting their community for travel.



# US Region

## Points of Interest:

- The Midwest continued to index highest amongst US regions and saw a notable increase this week.
- The West and Midwest regions showed a slight decrease in safety concerns this week.
- The Midwest amongst all regions showed the most excitement for travel and openness for travel messaging this week.

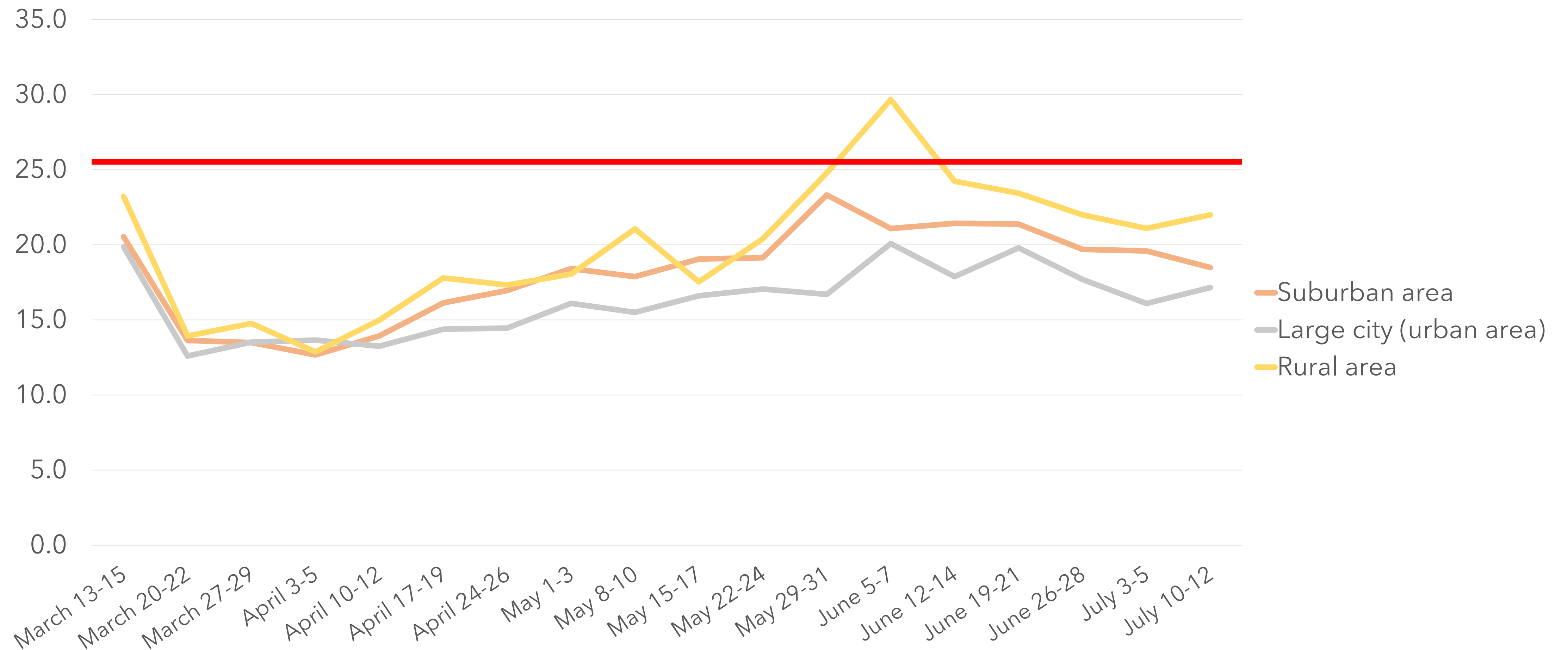




# Type Of Residence

## Points of Interest Impacting Index Scores:

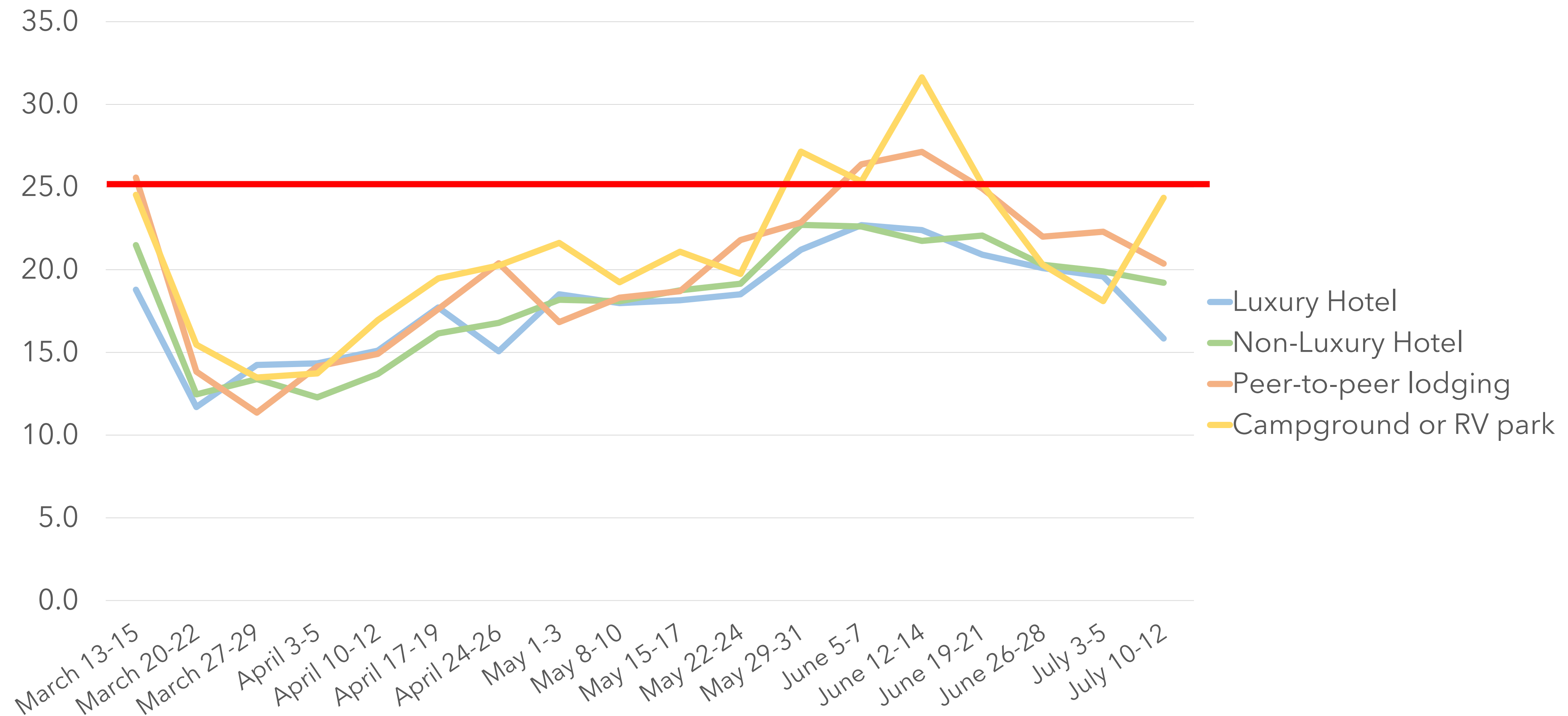
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Suburban respondents reported a slight increase in safety concerns this week.
- Large City Urban respondents were the most likely to report a Federal tax credit would increase the likelihood of taking a trip.



# Lodging Type Used in last 2 years

## Points of Interest:

- Campground respondents indexed highest amongst lodging types and saw a significant increase this week.
- Even with a relative drop in average Index score, Luxury Hotel respondents were again the most likely to say they'd be likely to take a trip they hadn't already considered if a good opportunity presented itself.







# What We've Learned About Meetings

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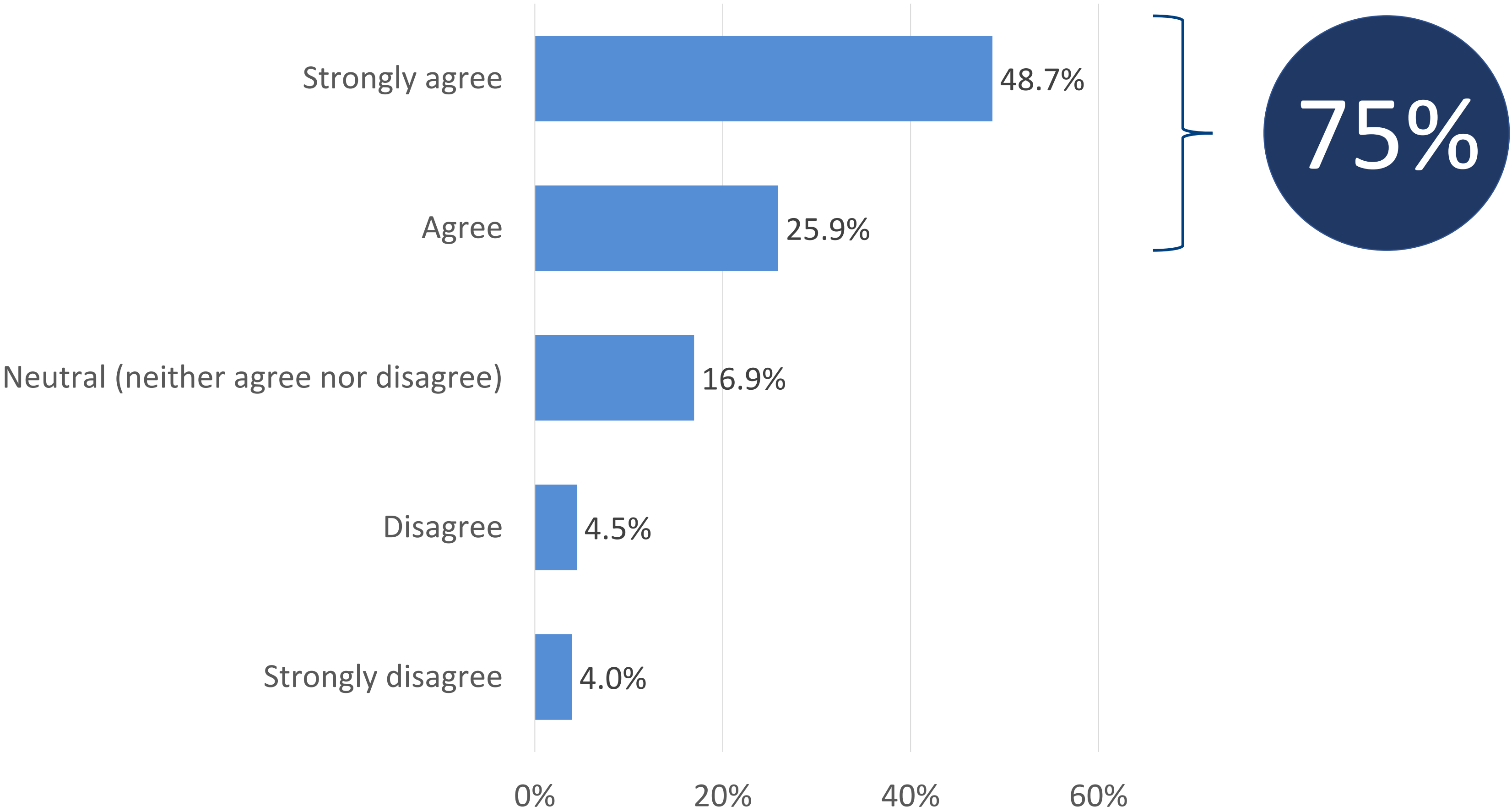


A group of business professionals in a modern lounge setting, engaged in conversation and holding drinks. The scene is dimly lit with warm, ambient lighting from pendant lamps. People are dressed in business casual attire, and the atmosphere appears to be a professional networking event.

# MEETING ATTENDEE SENTIMENT



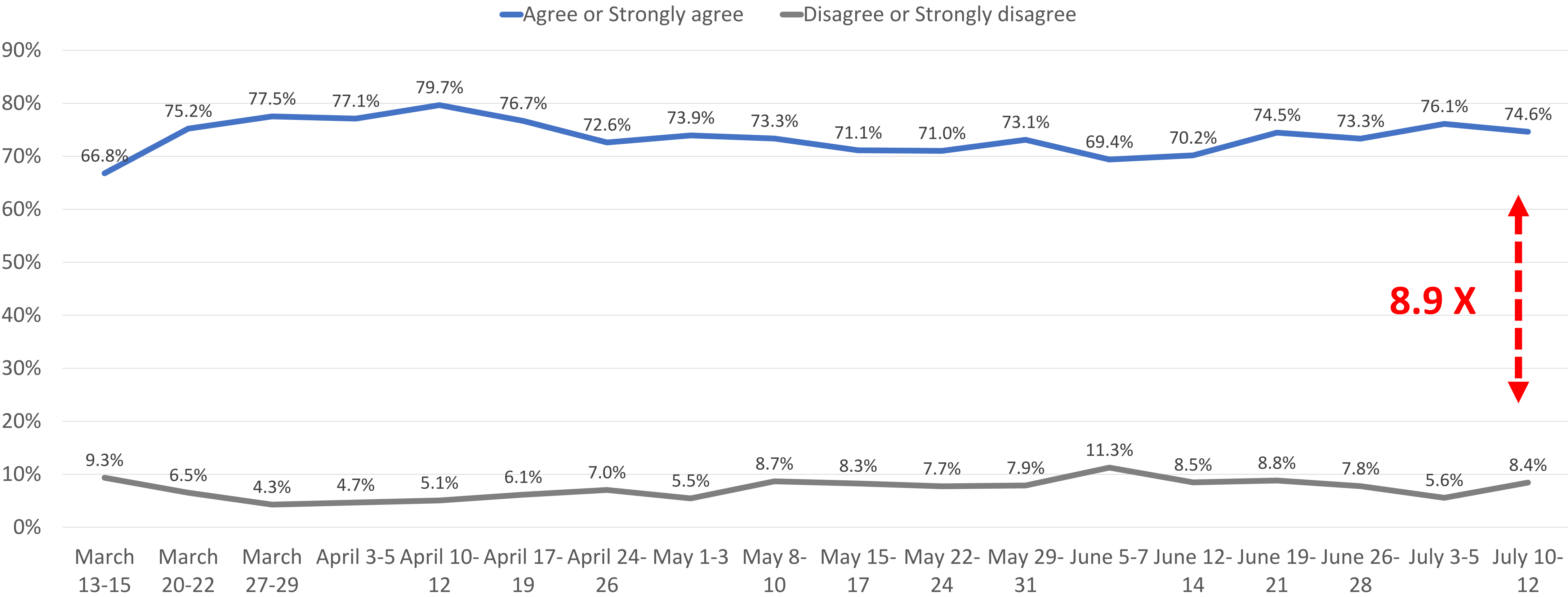
# UNLIKELY TO ATTEND CONFERENCES



Question: I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers. Sample size = 1,213

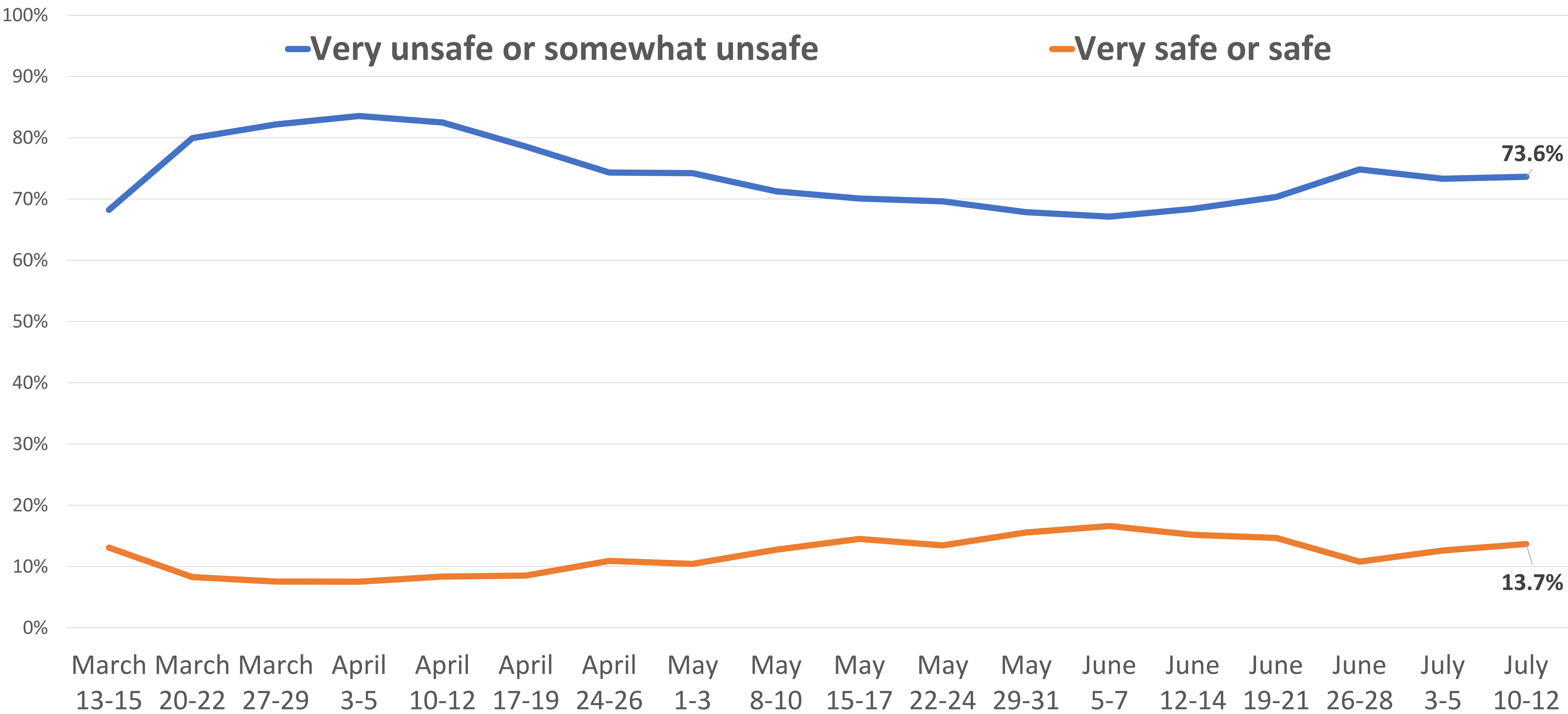
# Avoiding Conventions & Conferences

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

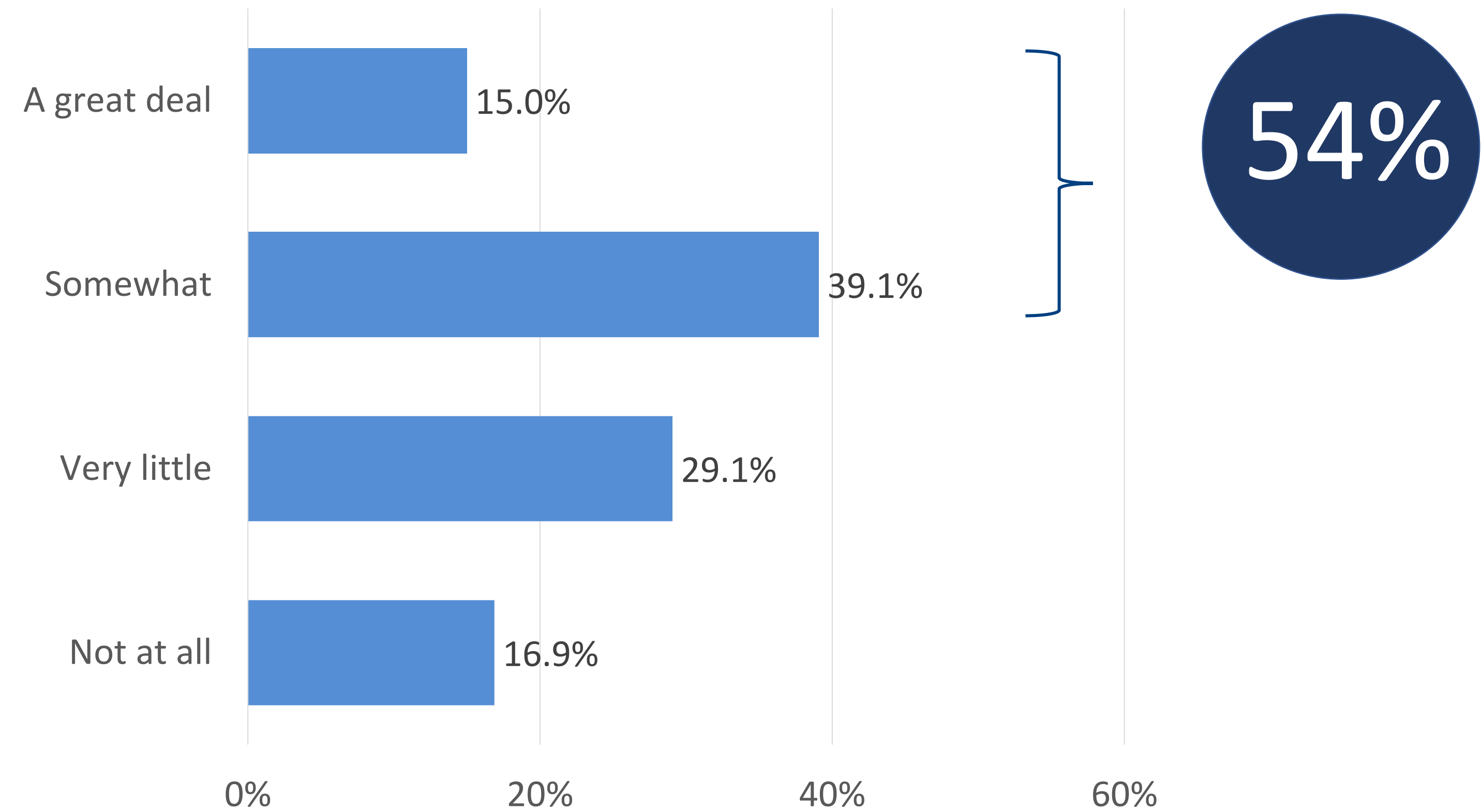




# Perceived Safety of Conventions & Conferences



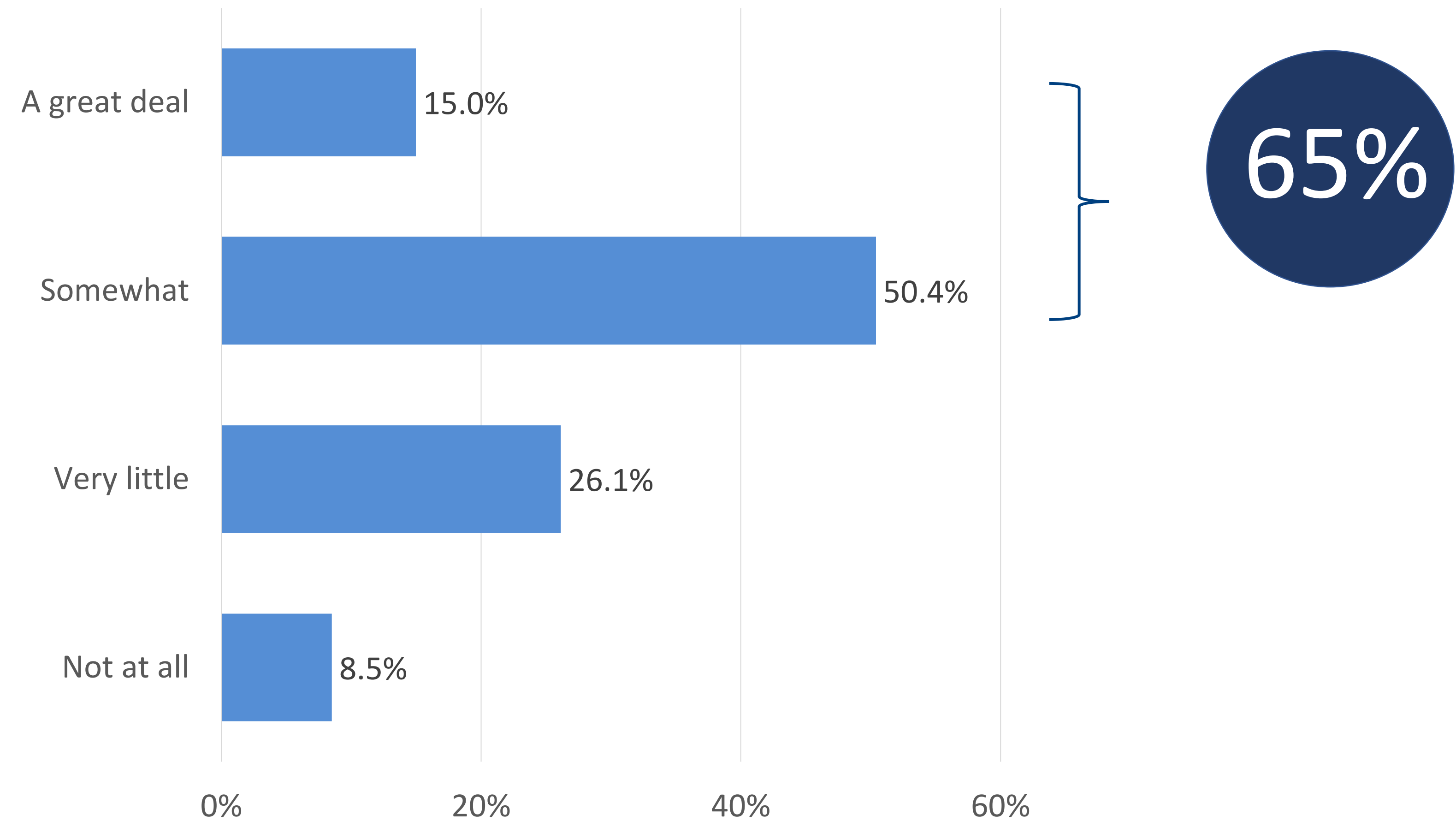
# TRUST IN FELLOW ATTENDEES



Question: Suppose you were to attend a conference or convention sometime in the next year. In general, how much would you trust your fellow attendees to conduct themselves appropriately, doing what they can to protect other attendees from exposure to the COVID-19 virus? I trust my fellow attendees \_\_\_\_\_. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers. Sample size = 1,213

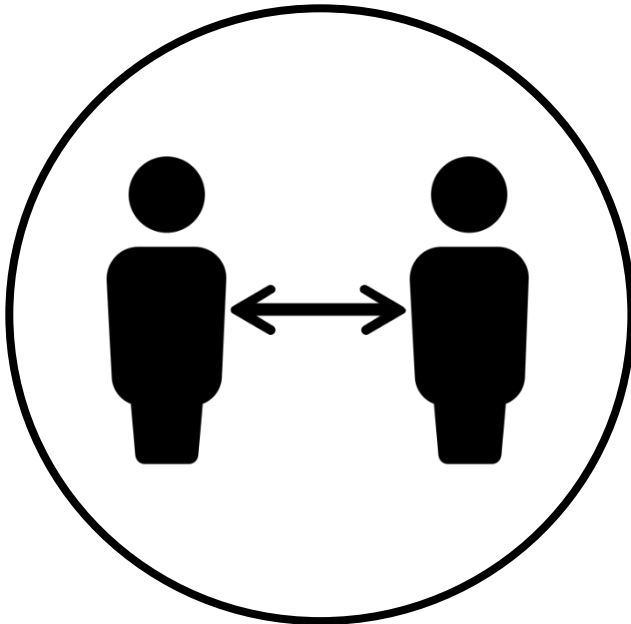
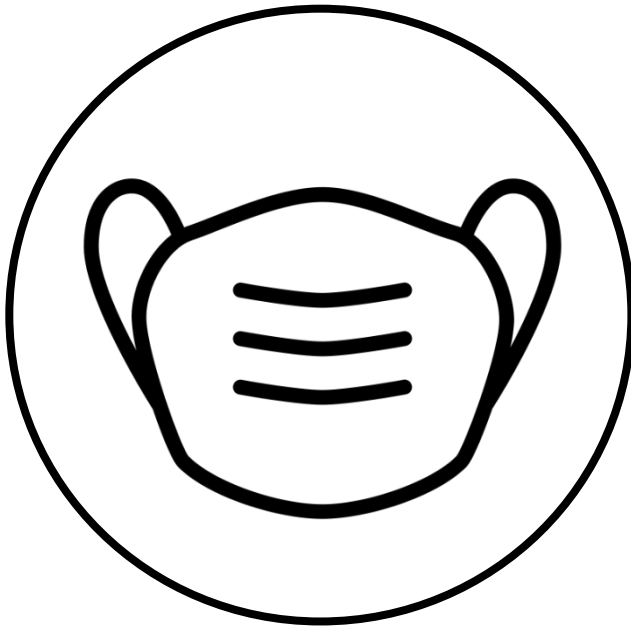
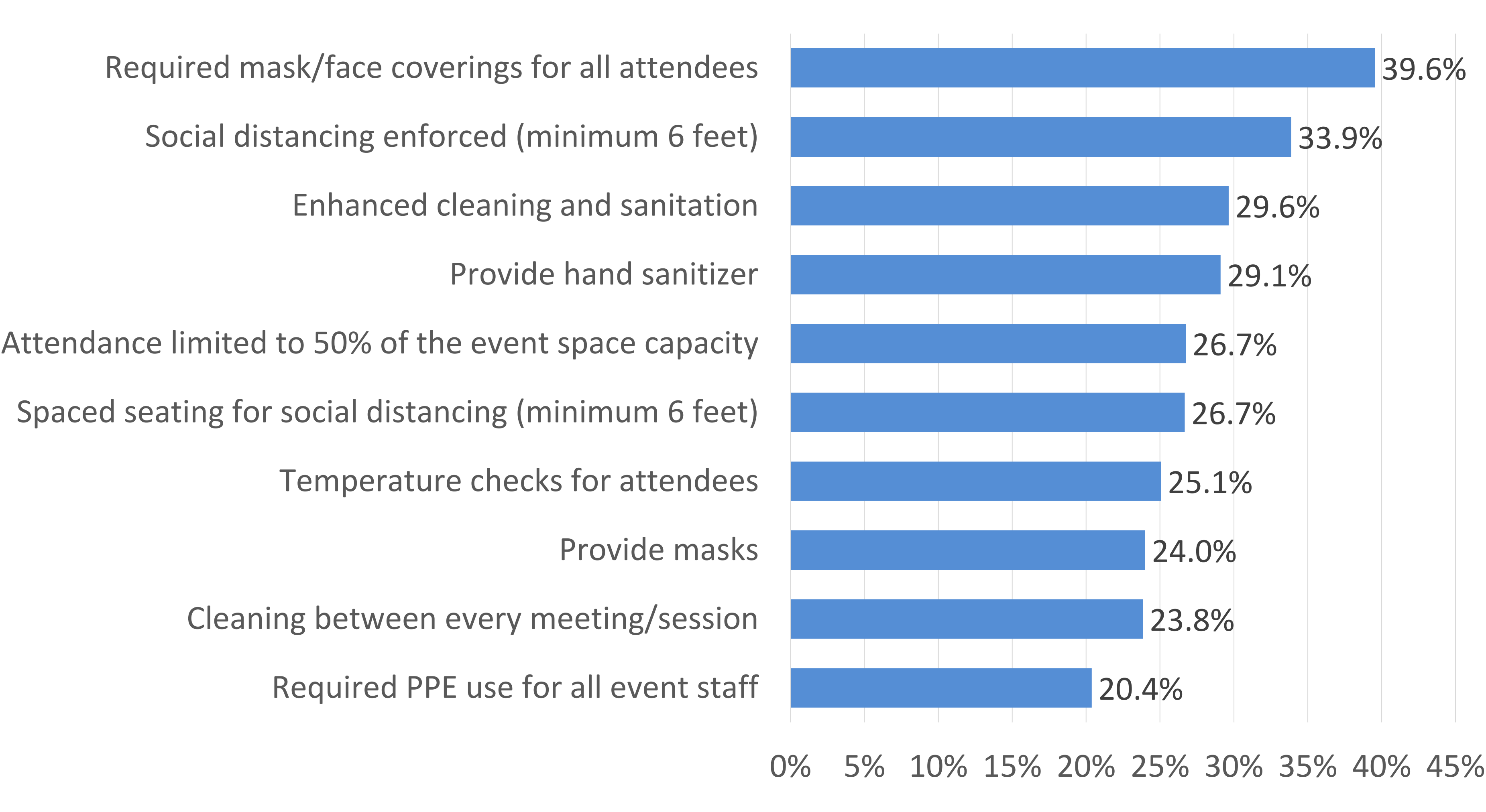


# TRUST IN HOST ORGANIZATION



Question: In general, how much would you trust the organization hosting the conference or convention to look out for your health? I would trust the hosting organization \_\_\_\_\_. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers. Sample size = 1,213

# TOP DESIRED OPERATIONAL PRACTICES FOR MEETINGS



Question: When attending a live event or conference in the future, which operational practices would make you feel most confident that the organization hosting the conference/event is looking after your health? (PLEASE SELECT AT MOST FIVE) Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers. Sample size = 1,213



# NEW RESEARCH

First  
Launched  
in **2017**

2020  
Conducted  
in **June**

Will  
Continue  
**Annually**

Survey  
of **Meeting  
Planners**

**300**  
Completed  
Surveys

Destination  Analysts

# AVERAGE NUMBER OF LIVE MEETINGS CANCELLED

---

5.6

CORPORATE

6.9

THIRD-PARTY

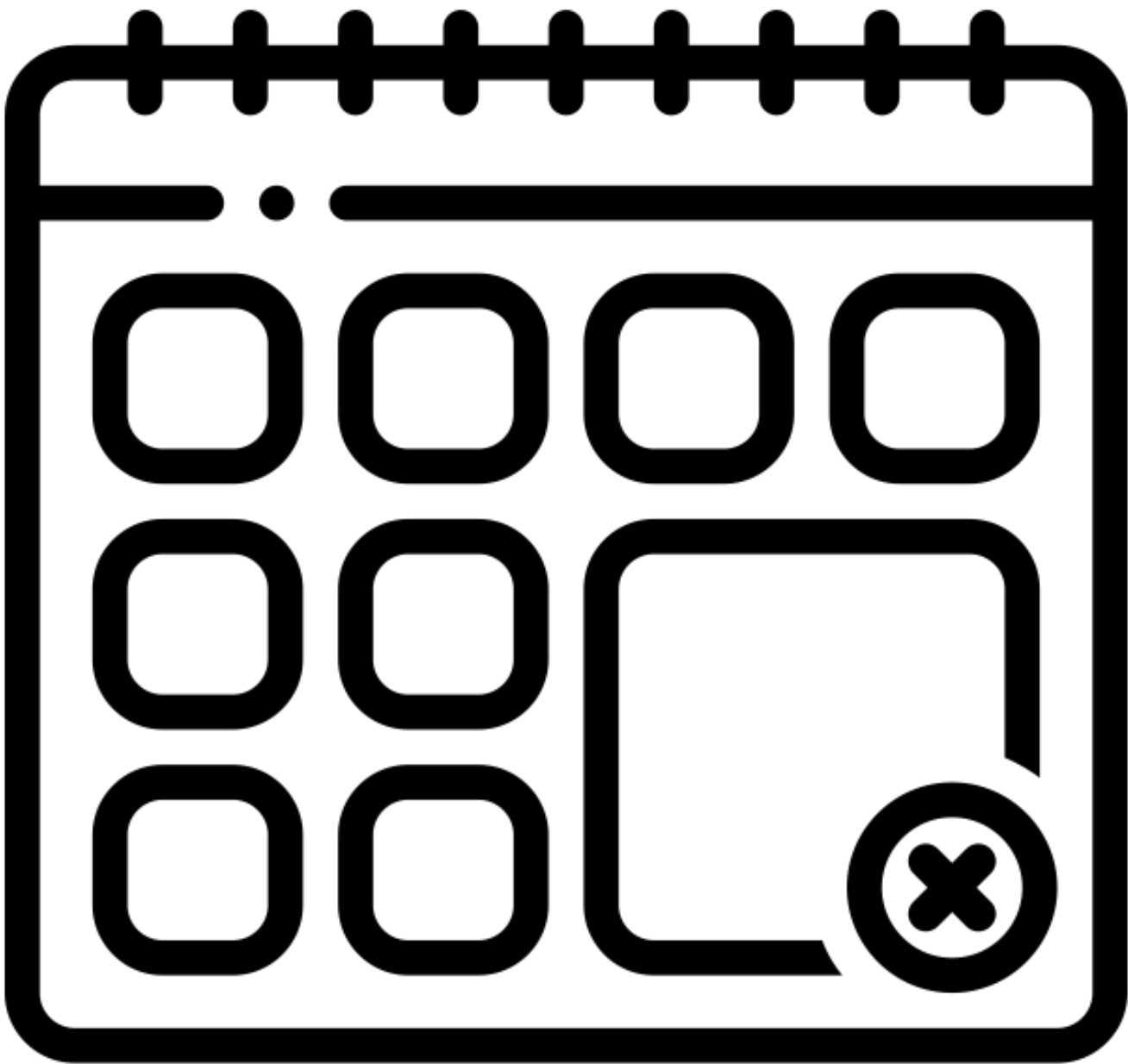
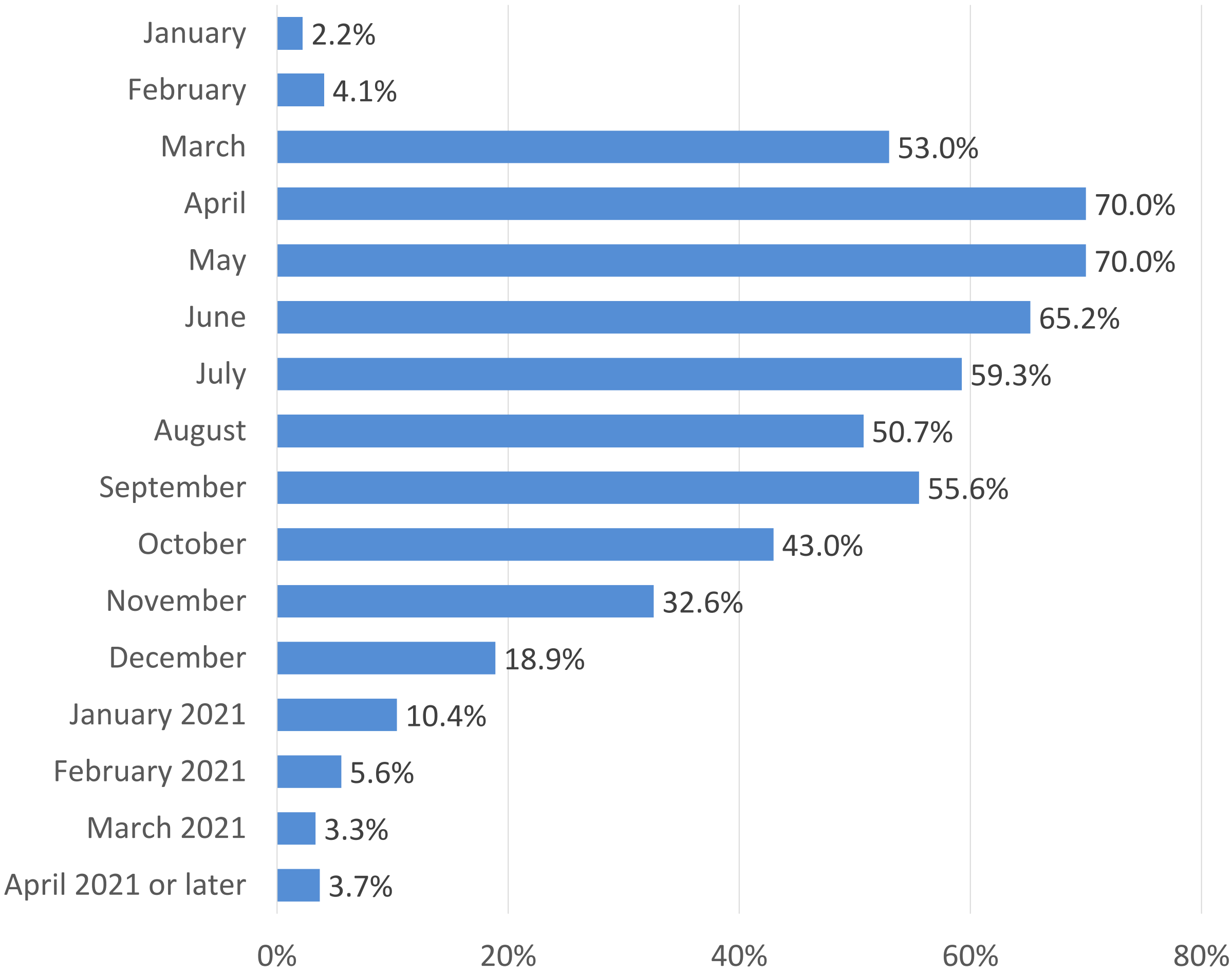
5.5

ASSOCIATION

Question: Since the Coronavirus situation emerged, how many live/in-person meetings or events has your organization or clients cancelled?



# TIMING OF CANCELLED MEETINGS



Question: In which months were any of these cancelled live meetings or events originally scheduled to take place? ?

# AVERAGE NUMBER OF LIVE MEETINGS POSTPONED

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3.4

CORPORATE

5.3

THIRD-PARTY

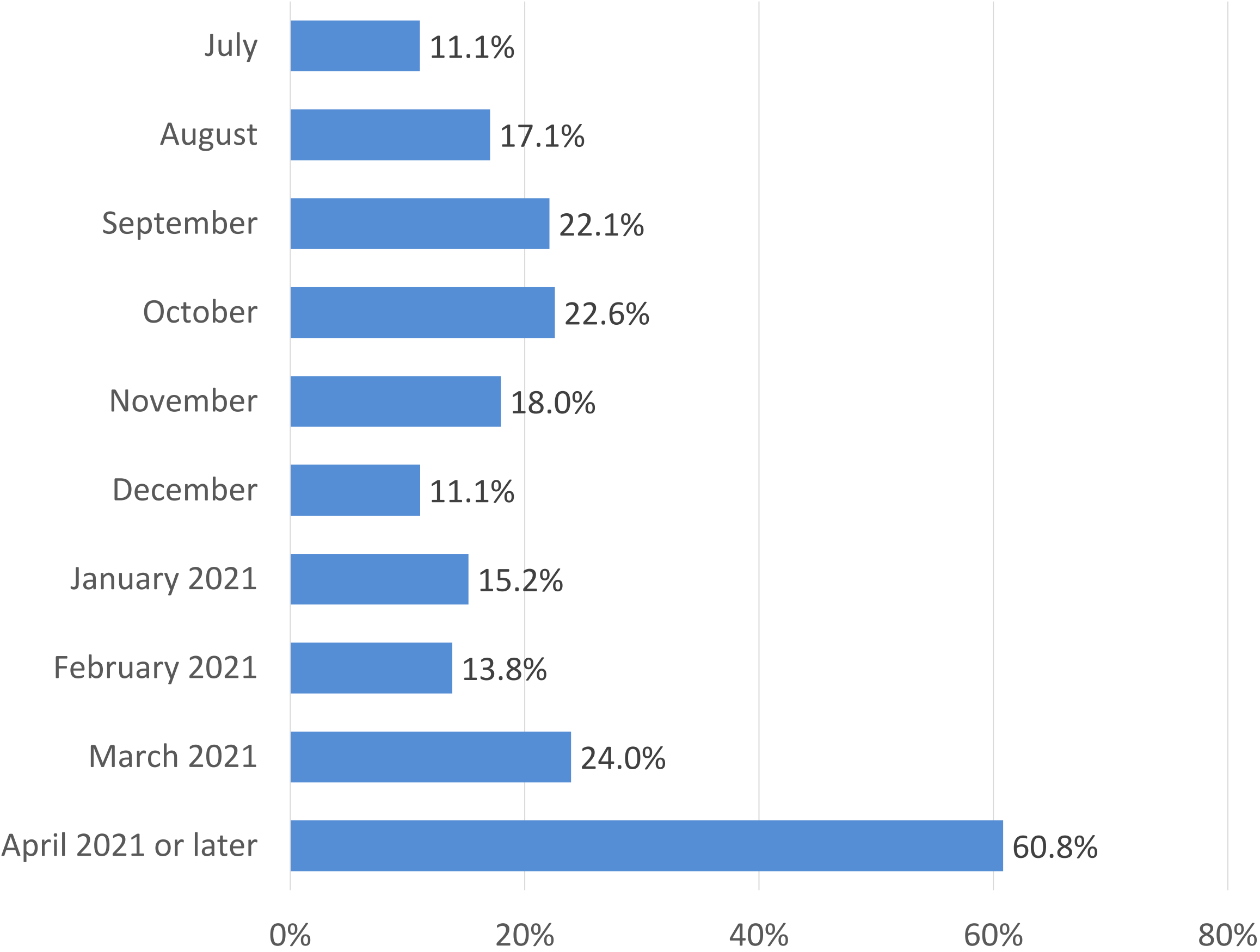
4.1

ASSOCIATION

Question: Since the Coronavirus situation emerged, how many live/in-person meetings or events has your organization or clients postponed?

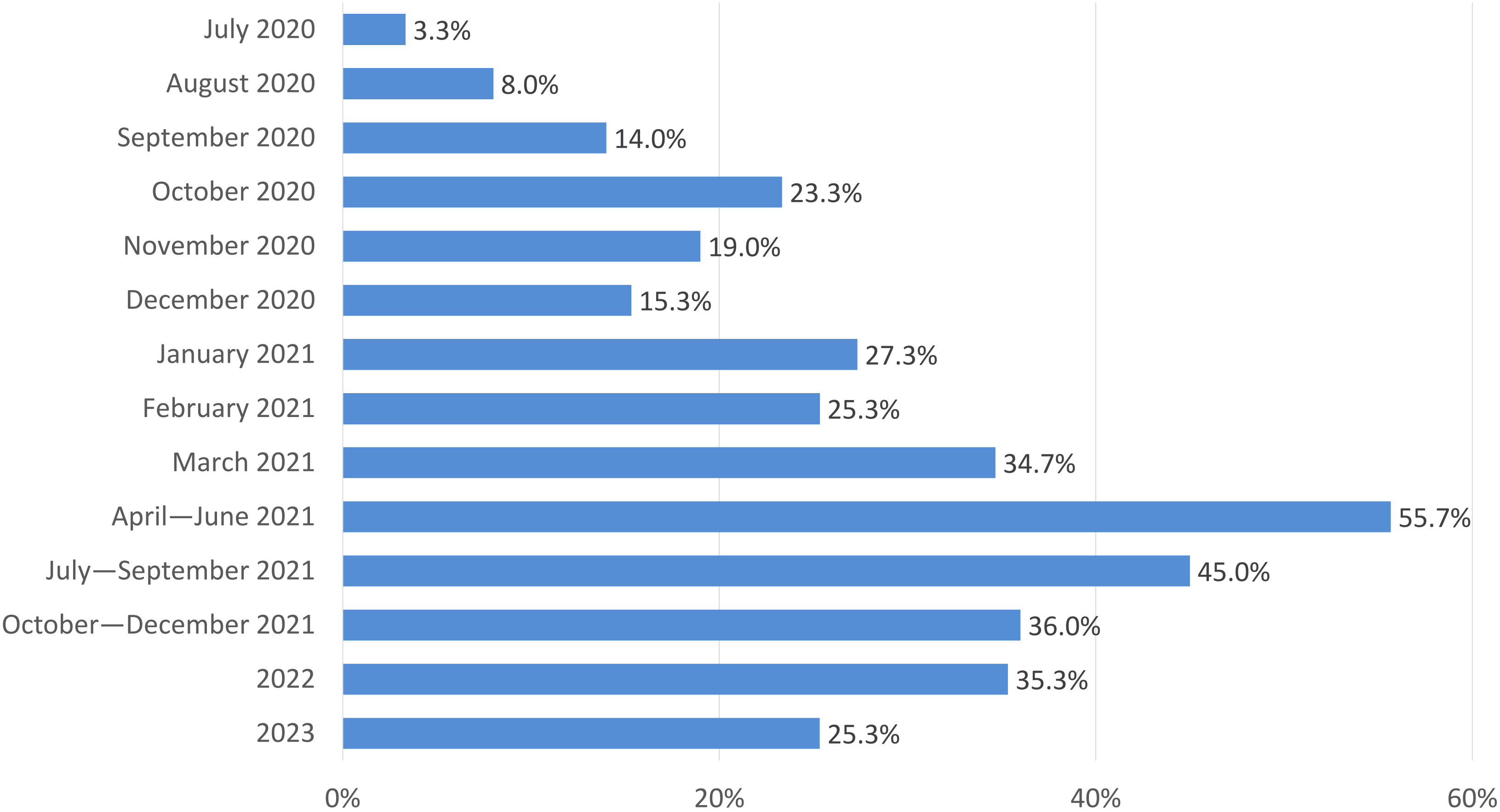


# MONTH OF MEETING POSTPONED TO...



Question: In which months were any of these postponed live meetings or events rescheduled to?

# TIMING OF CURRENT BOOK OF BUSINESS

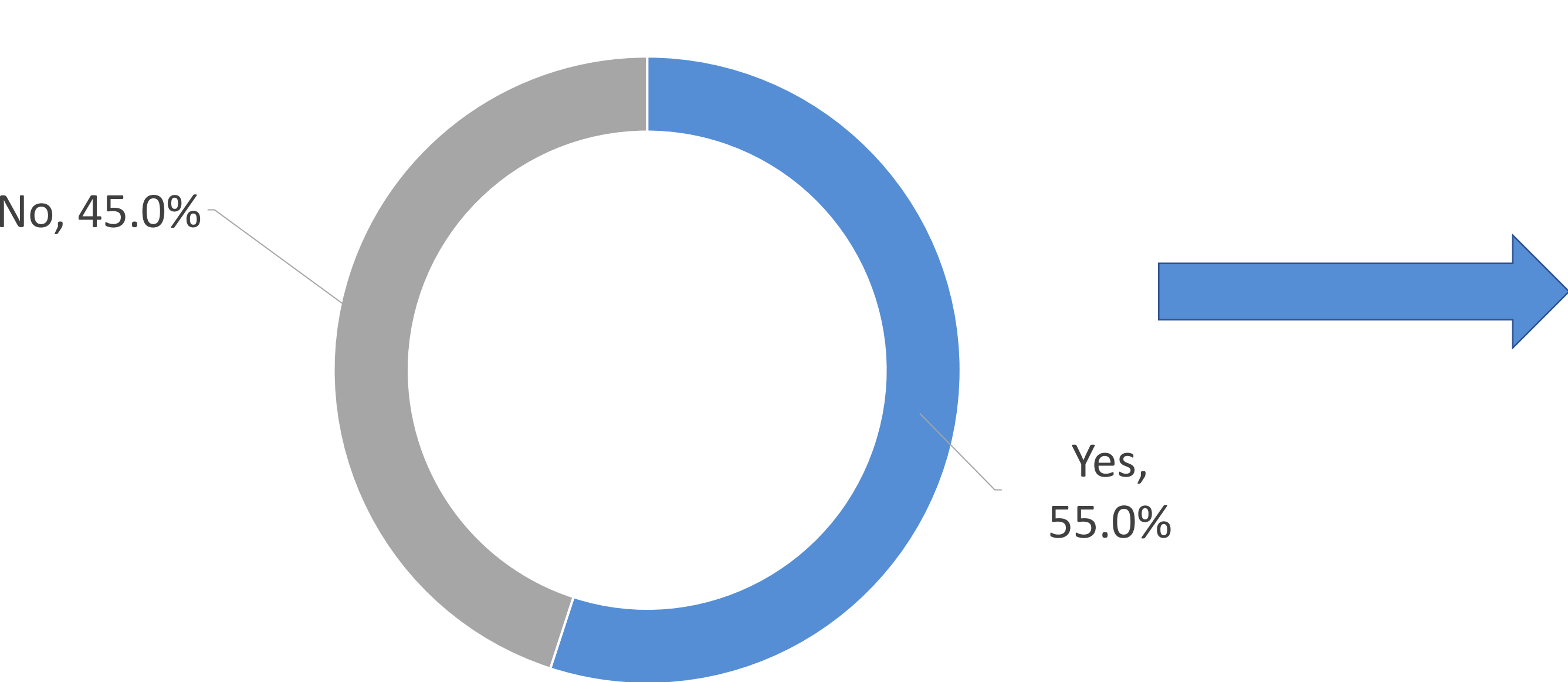


Question: Please tell us about the live meetings and events you currently have on the books. In which months and years do you have live meetings or events scheduled? (Select all that apply)

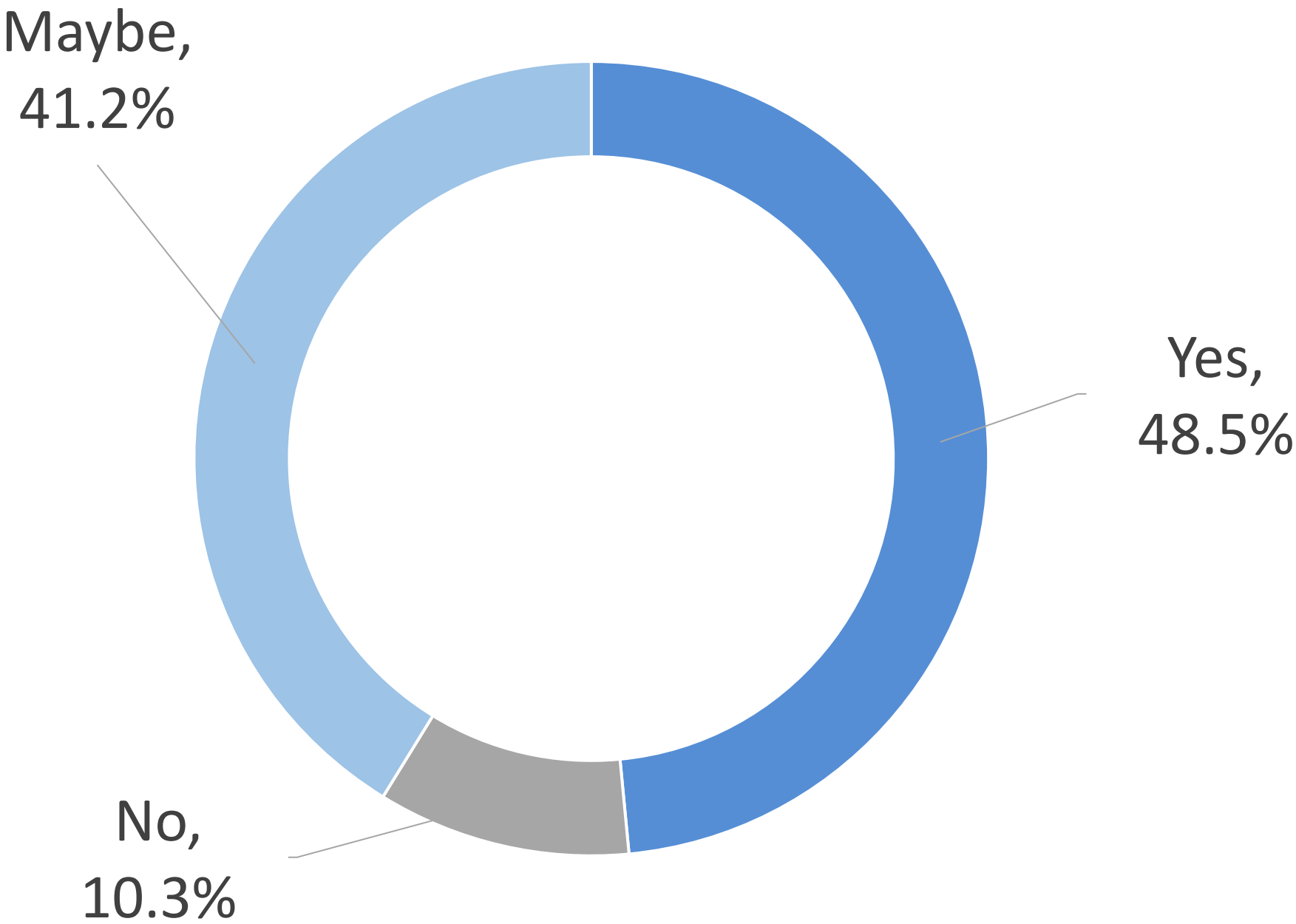


# WORKING EVENTS SCHEDULED FOR NEXT 6 MONTHS

## VIRTUAL MEETING COMPONENT FOR LIVE EVENTS

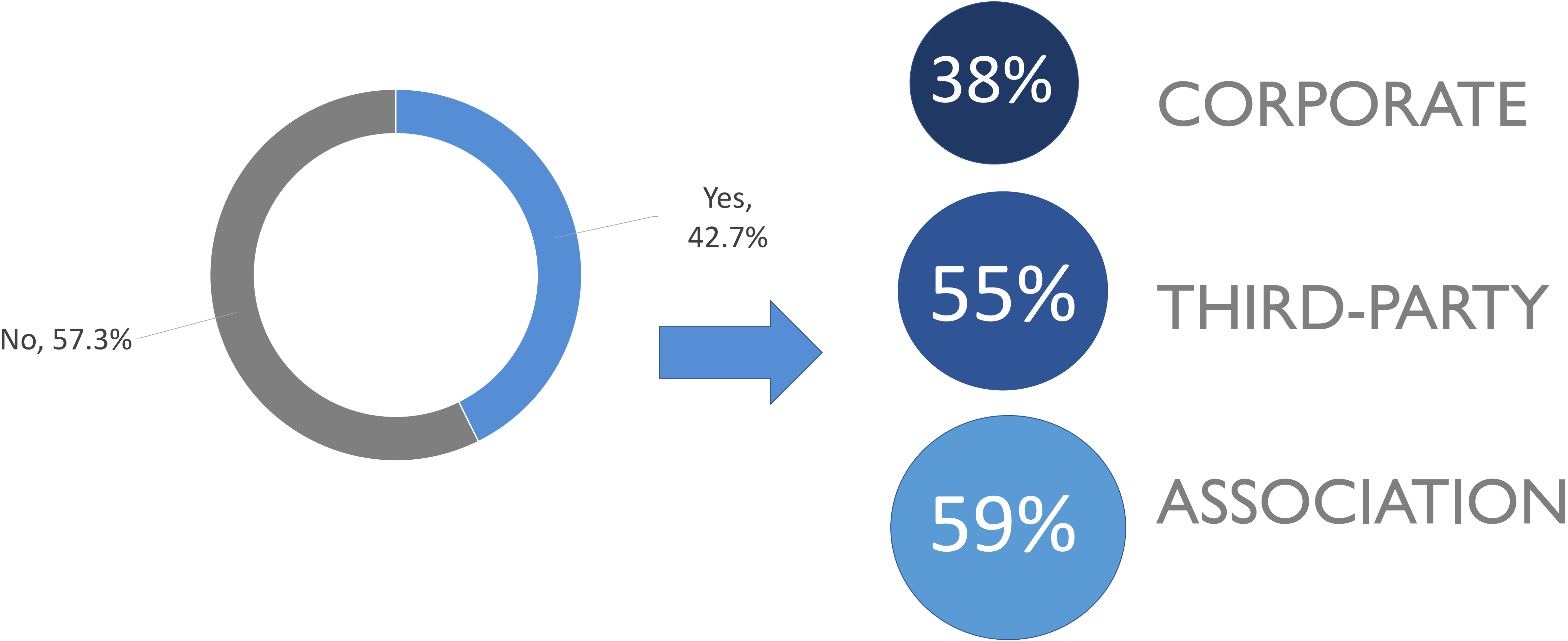


Question: Are you currently working on any meetings or events that are already scheduled or being considered for the NEXT SIX (6) MONTHS?



Question: Will any of these live meetings have a virtual option for those that do not want to attend live?

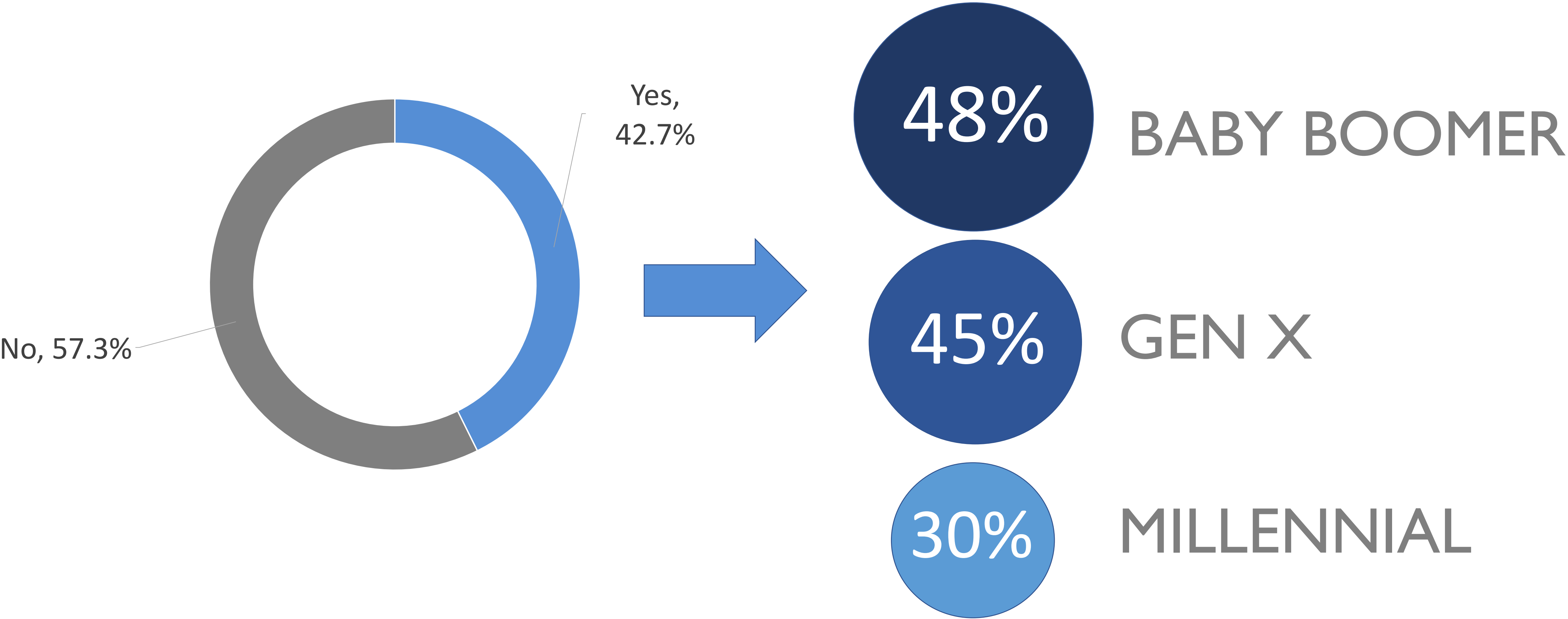
# CURRENTLY WORKING WITH CVBS



Question: Are you currently working with any Convention & Visitors Bureaus?

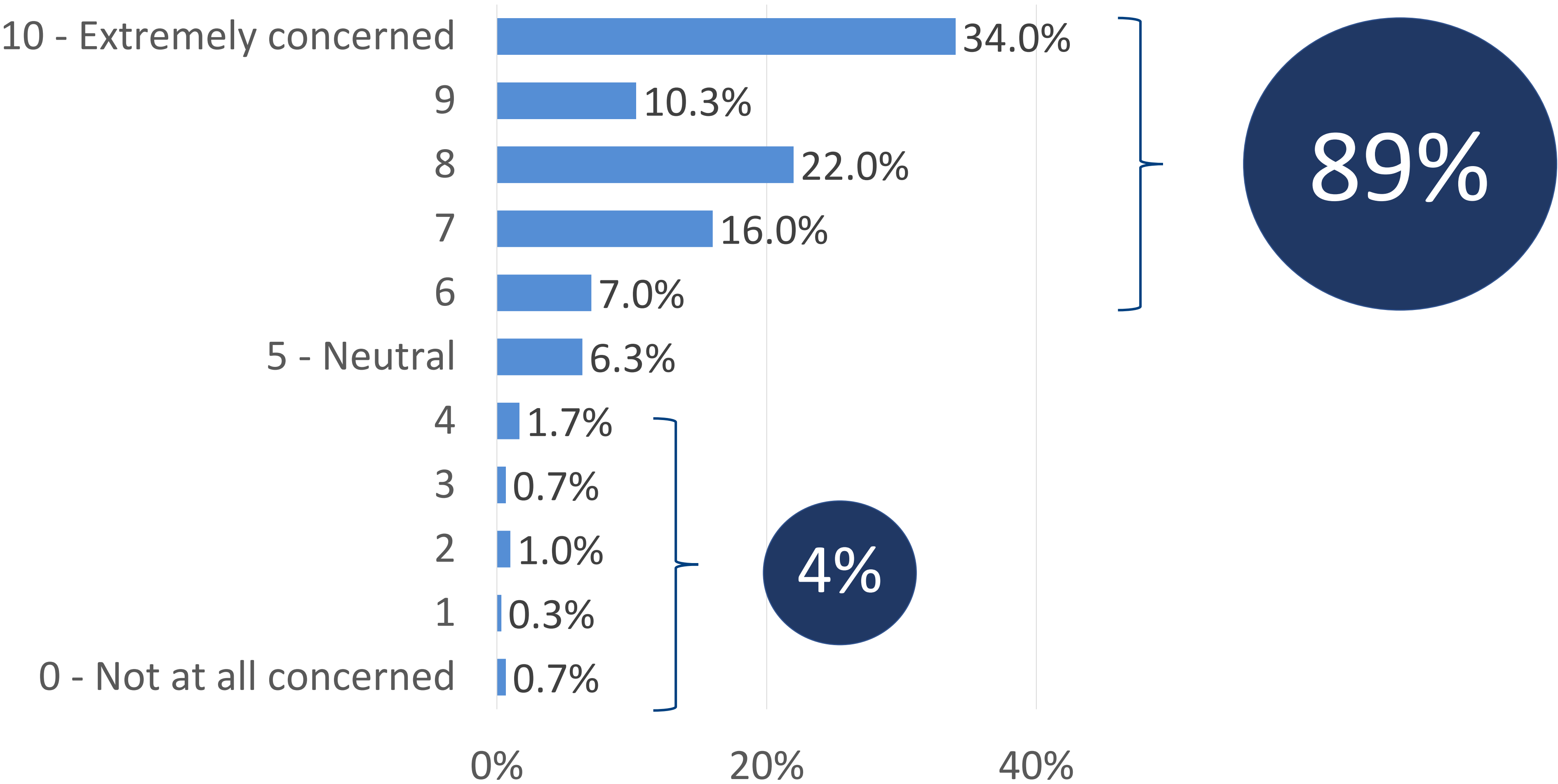


# CURRENTLY WORKING WITH CVBS



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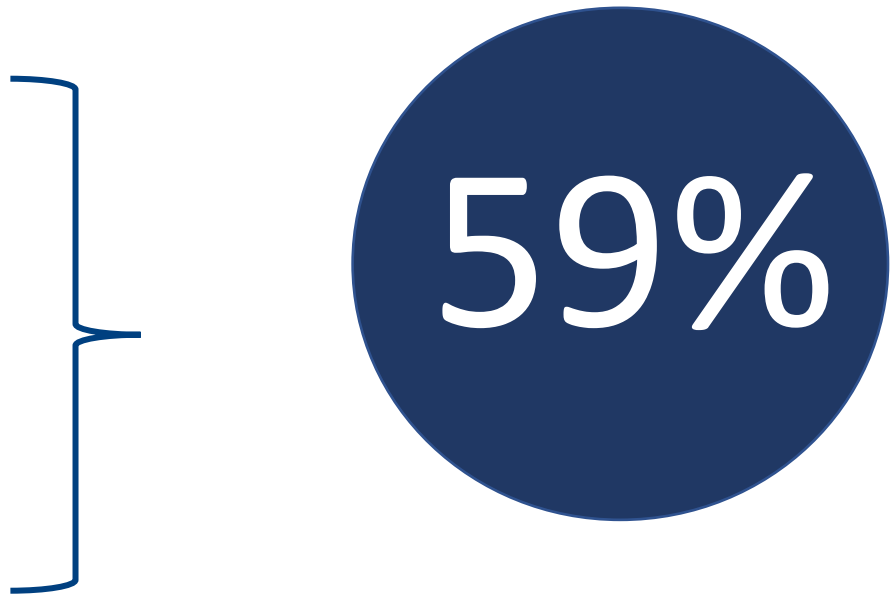
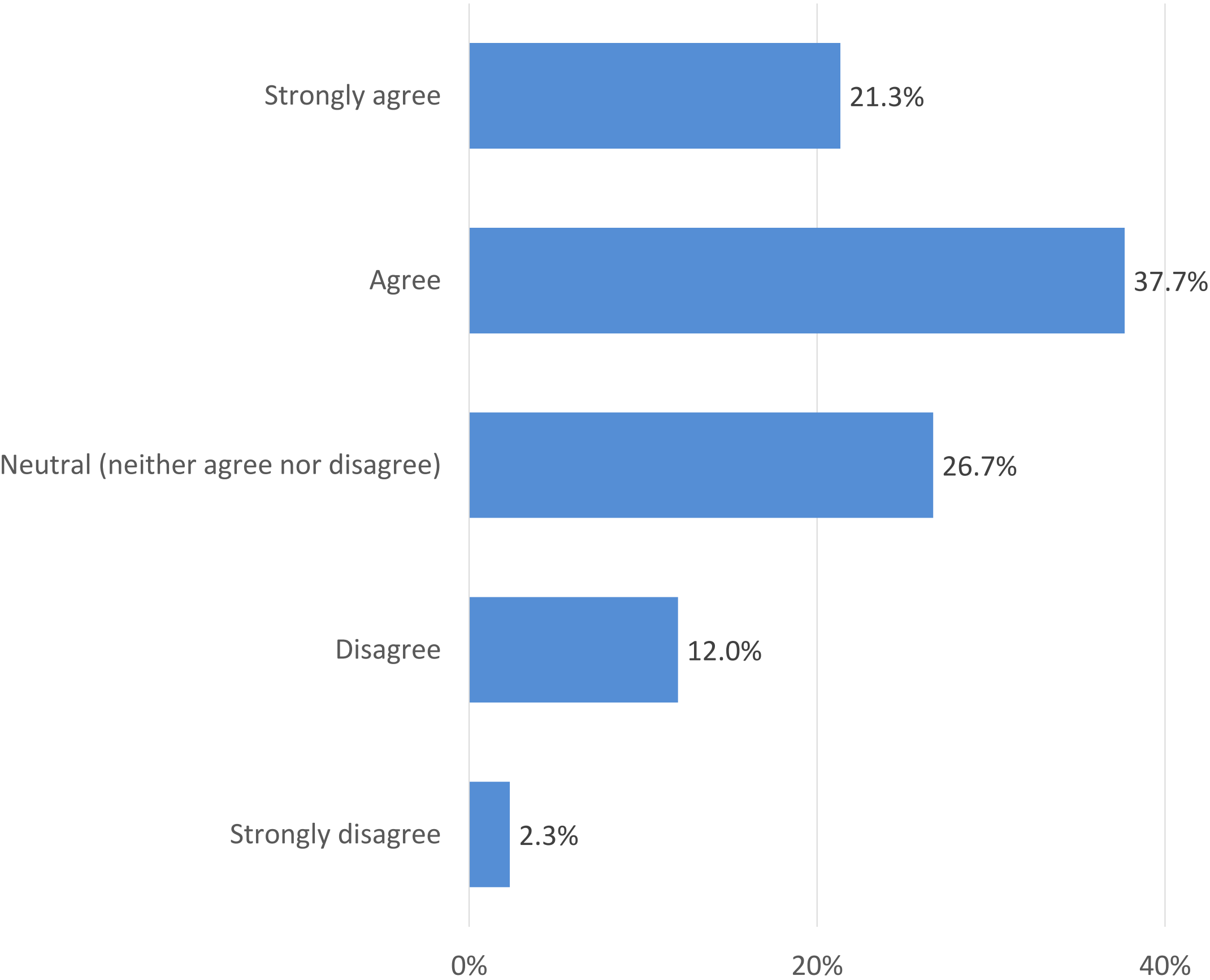
# CONCERN ABOUT INDUSTRY'S RECOVER: NEXT 12 MONTHS



Question: Thinking about the current coronavirus situation, how concerned are you about the meetings industry recovering within the next twelve months? (Please answer using the scale below)



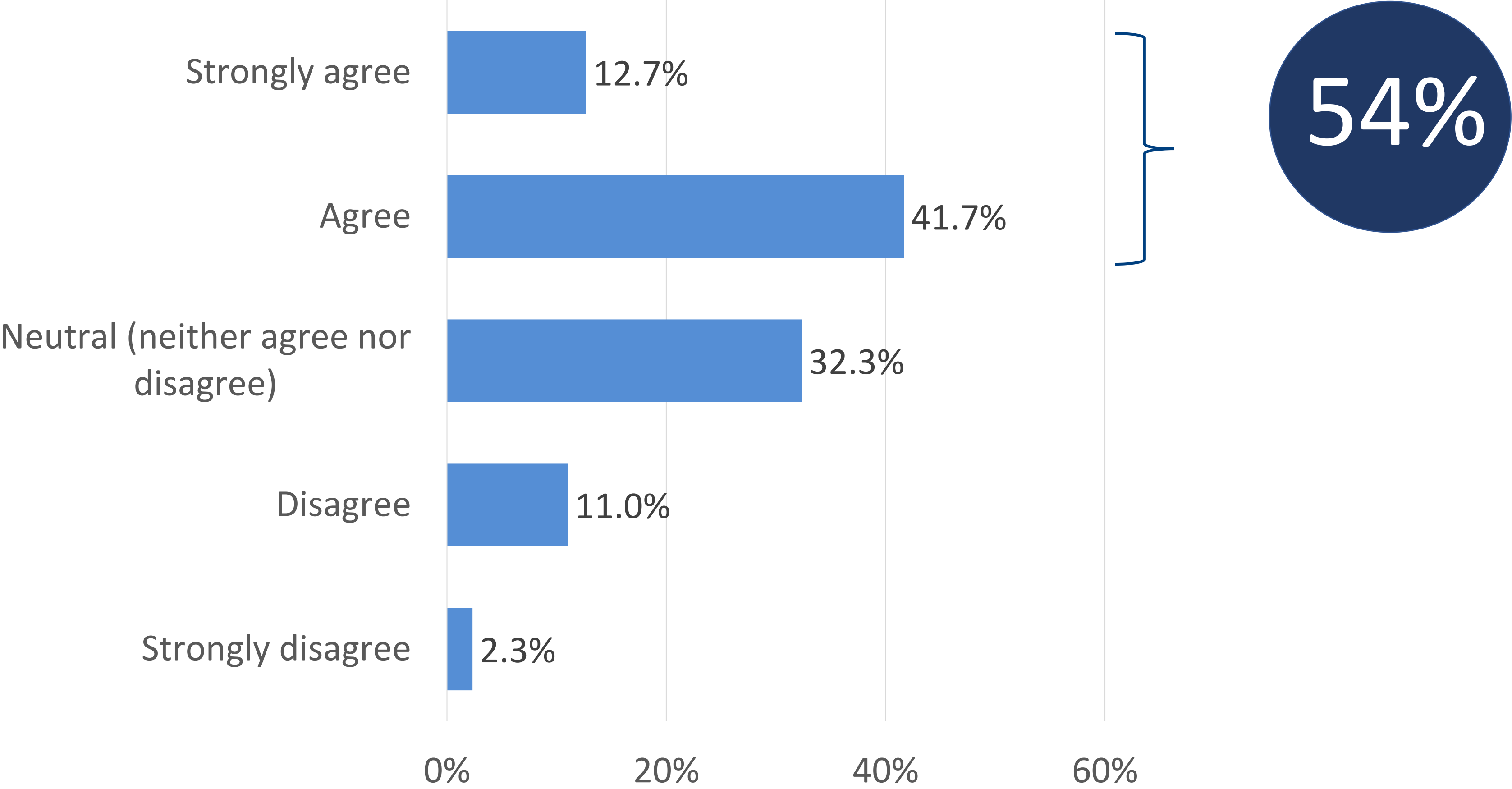
# FORCE MAJEURE ISSUES ARE A SERIOUS PROBLEM



**Third-Party** Planners (67.5%) and **Association** Planners (63.8%) are likelier than Corporate Planners (55.0%) to **consider this a serious problem.**

Question: Dealing with force majeure issues is a serious problem for my organization right now.

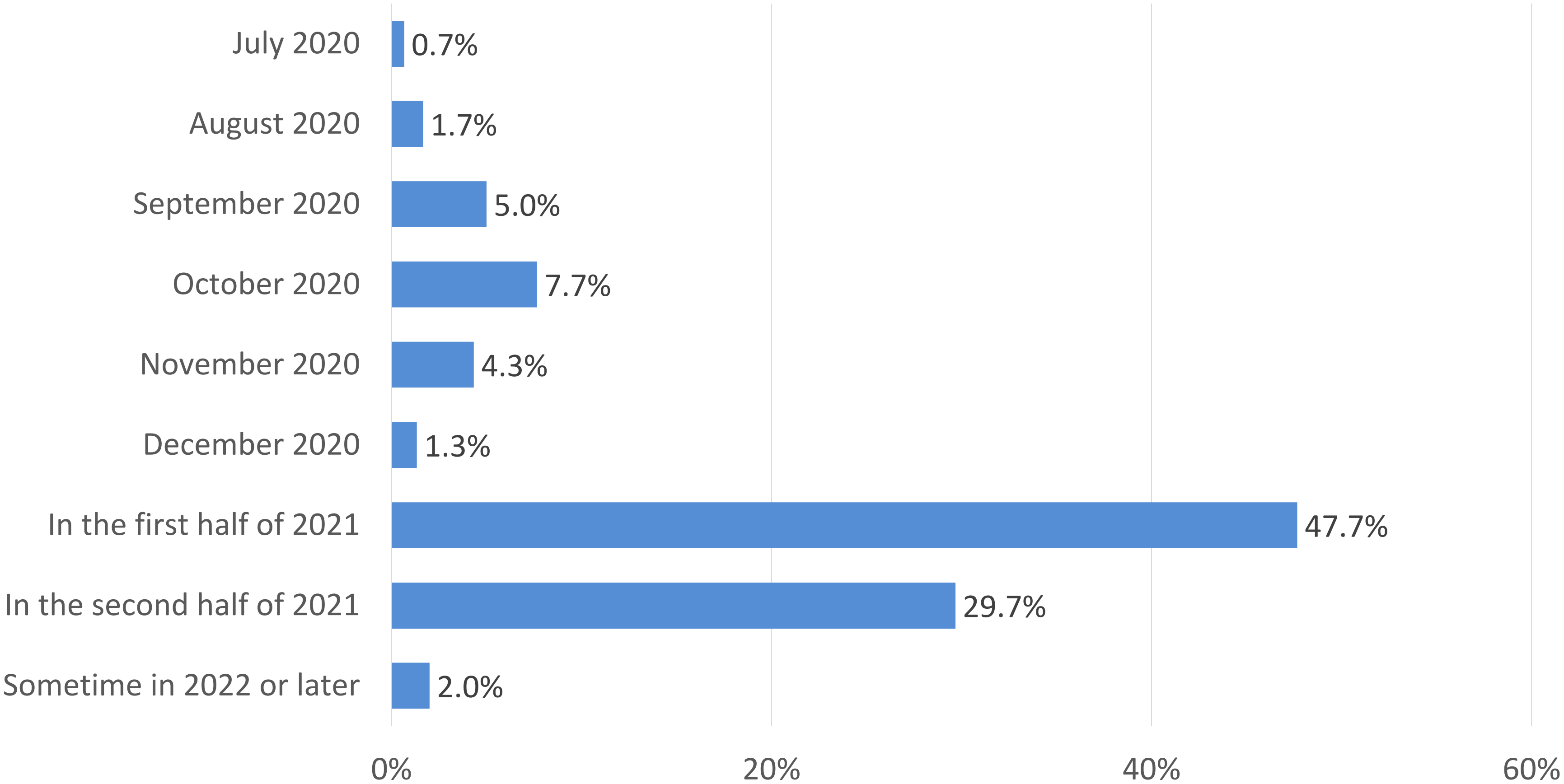
# MORE NEGOTIATING POWER FOR PLANNERS



Question: The coronavirus pandemic will end up giving more negotiating power to meeting and event planners and less to hotels.

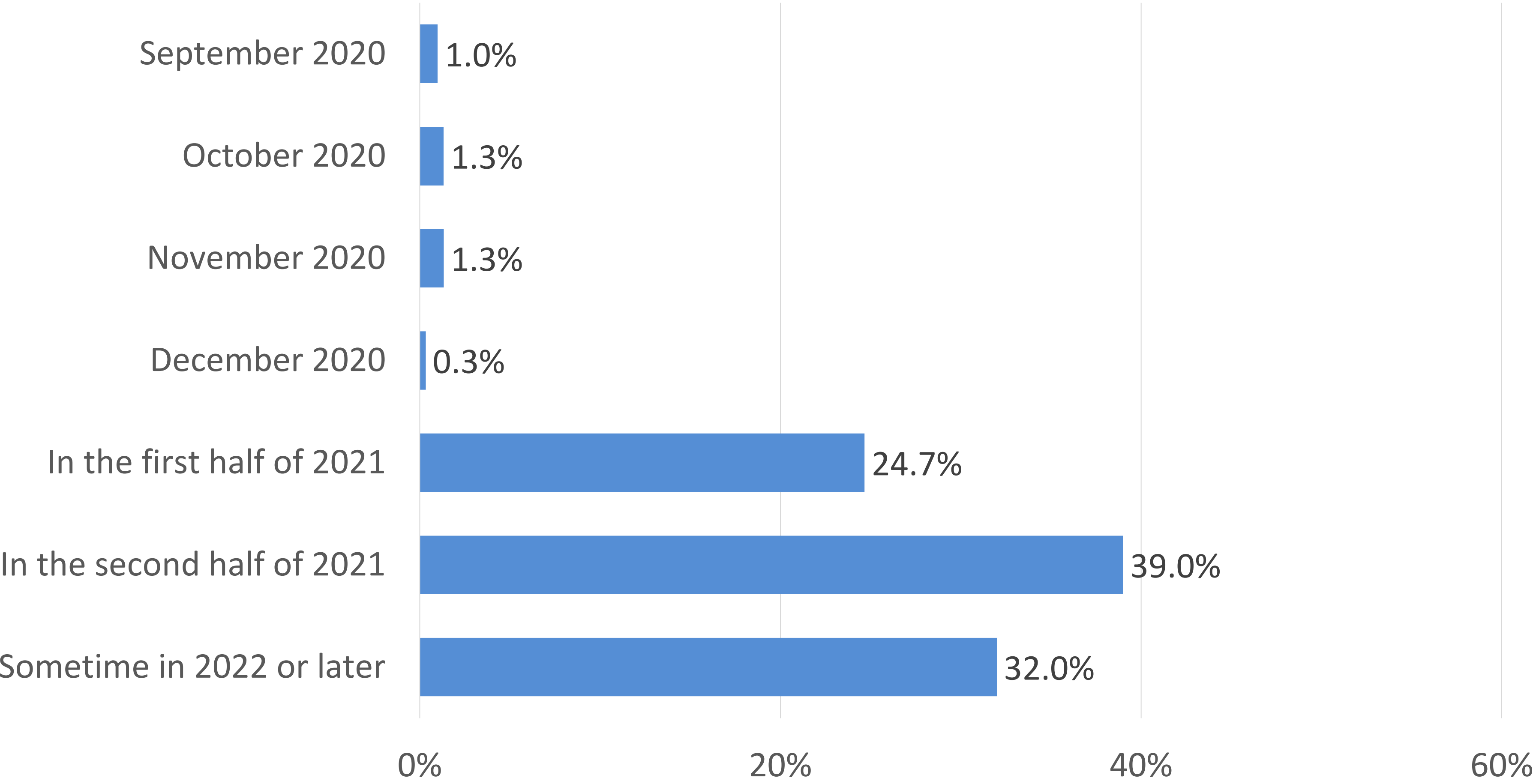


# WHEN LIVE MEETINGS WILL LIKELY RETURN



Question: If you were advising on the timing of holding a live/in-person meeting or event, which month would you say is the soonest they should consider holding their live event? (Select one) Source:

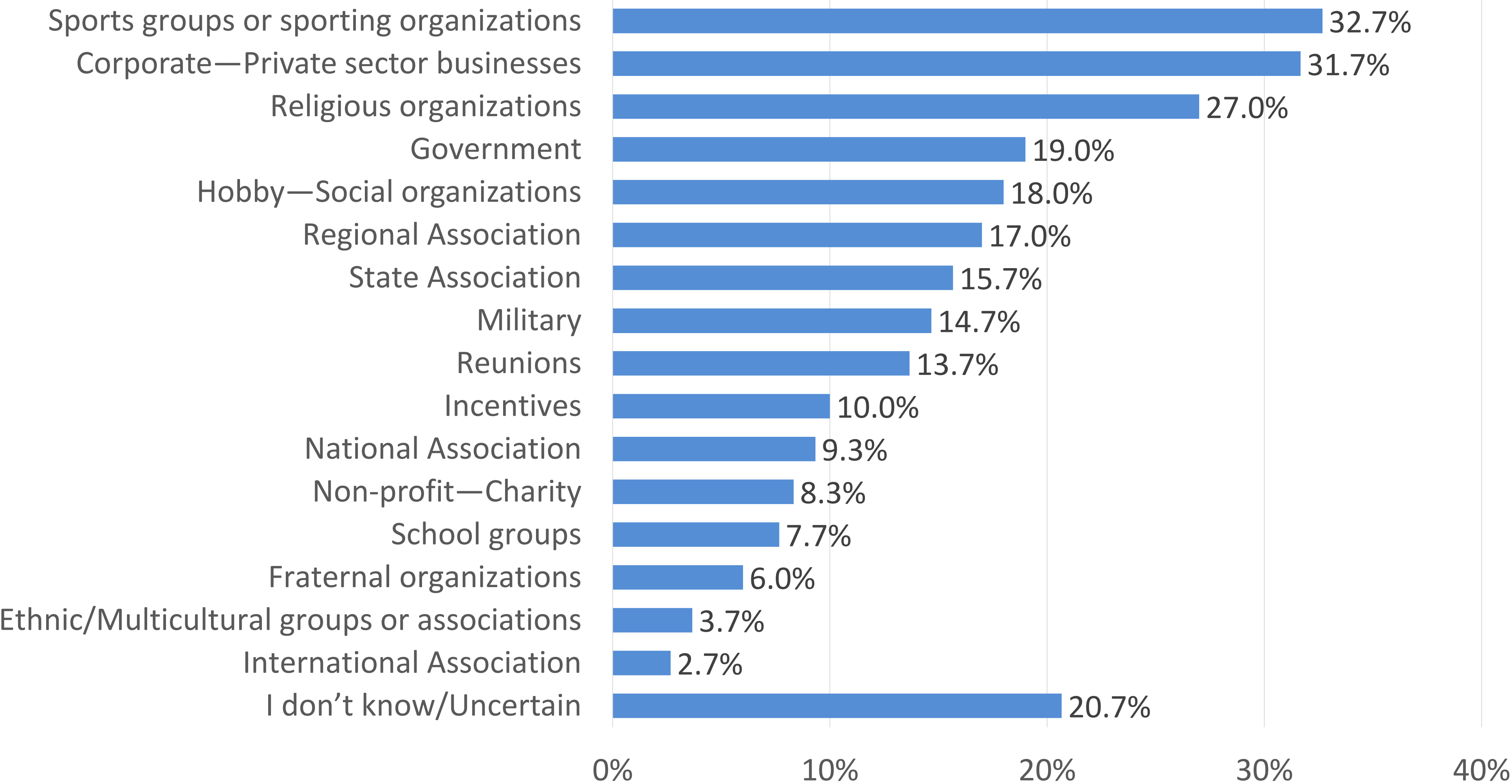
# WHEN MEETINGS BUSINESS WILL RETURN TO NORMAL



Question: If you had to predict, in which month do you think the meetings and events business will return to normal (or near normal) levels?

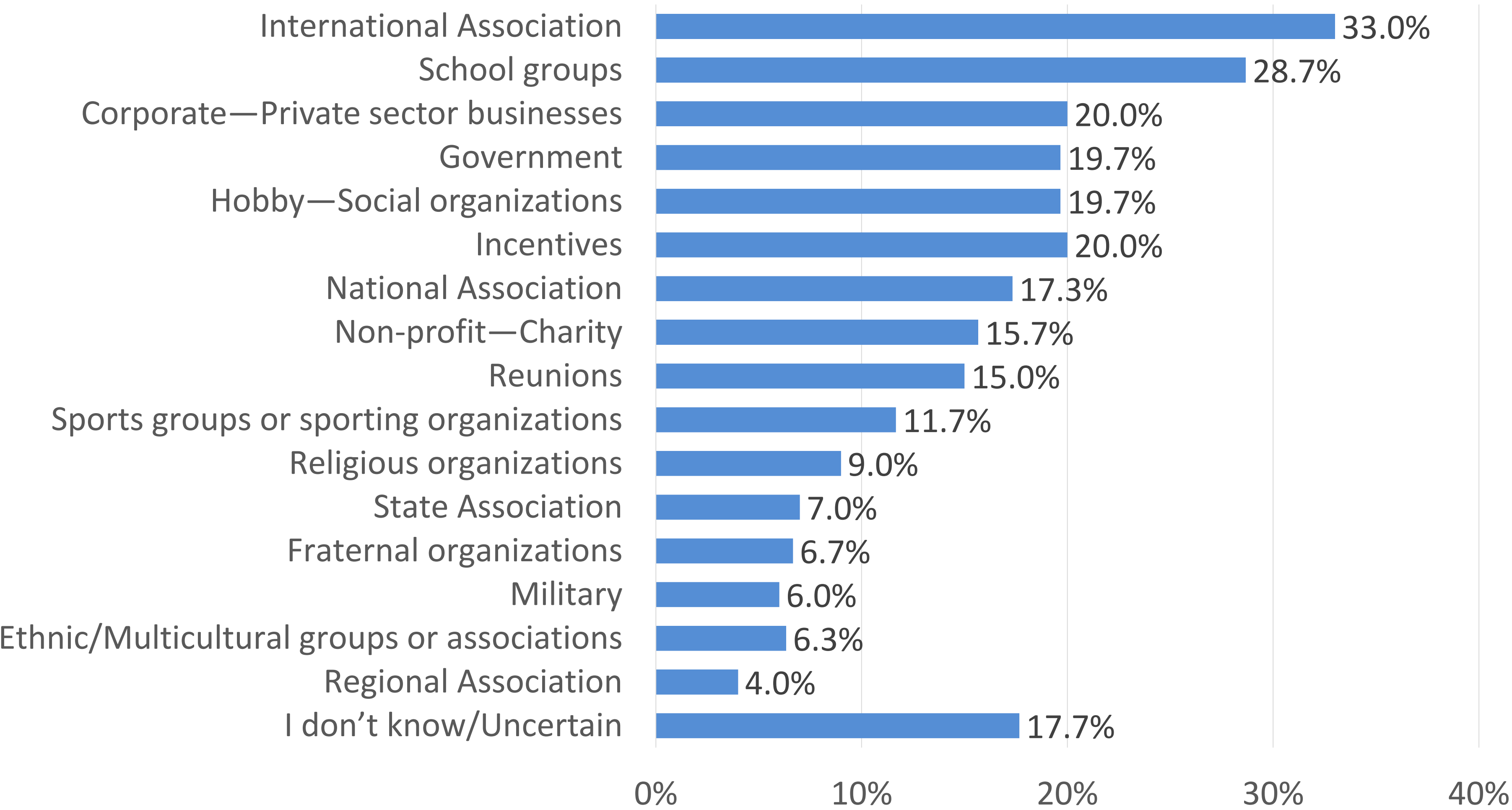


# FIRST GROUPS TO RETURN TO LIVE EVENTS



Question: Which types of these groups do you think will be THE FIRST TO COME BACK to live events? (Select all that apply) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

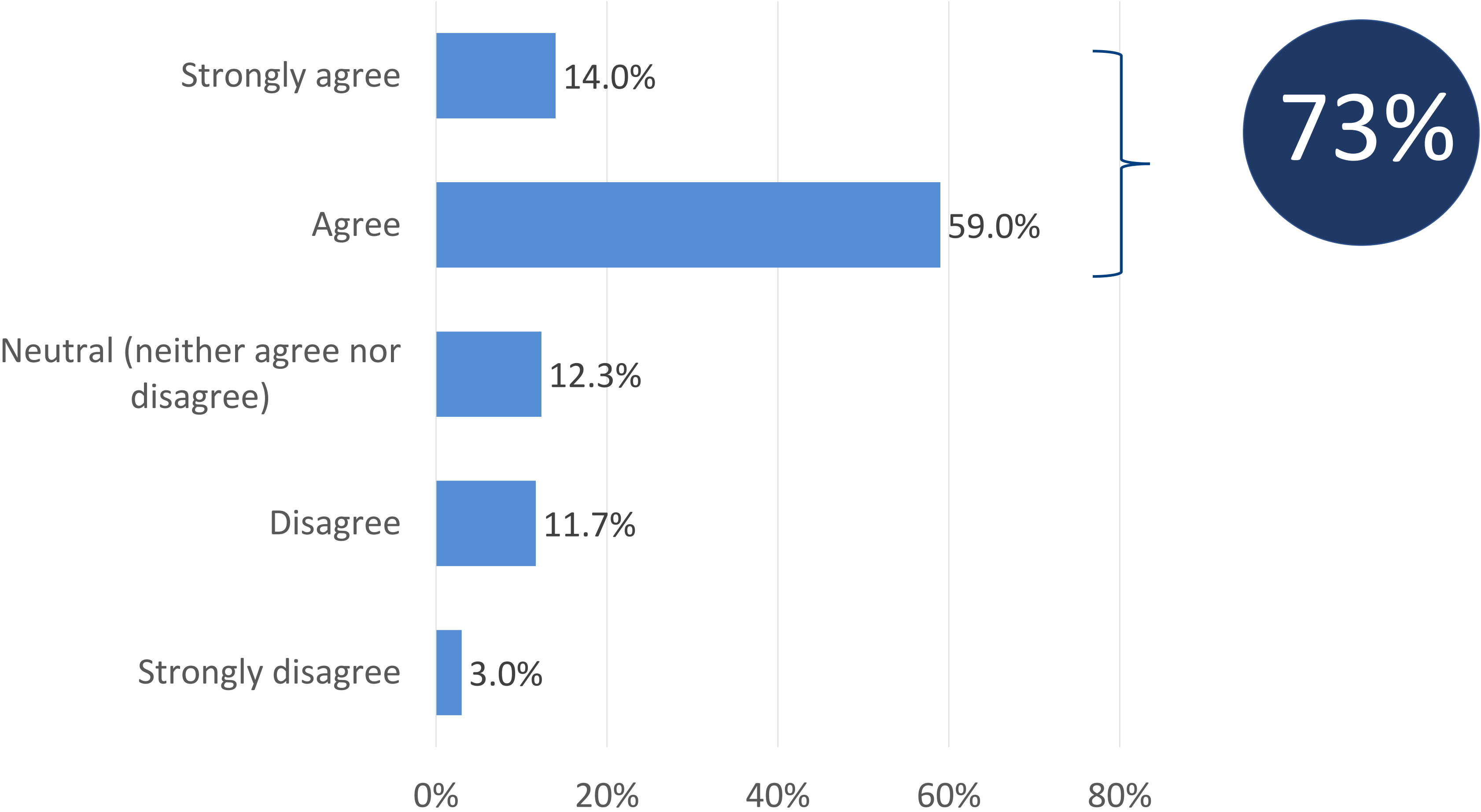
# SLOWEST GROUPS TO RETURN TO LIVE EVENTS



Question: Which types of these groups will be the SLOWEST TO COME BACK to live events? (Select all that apply)

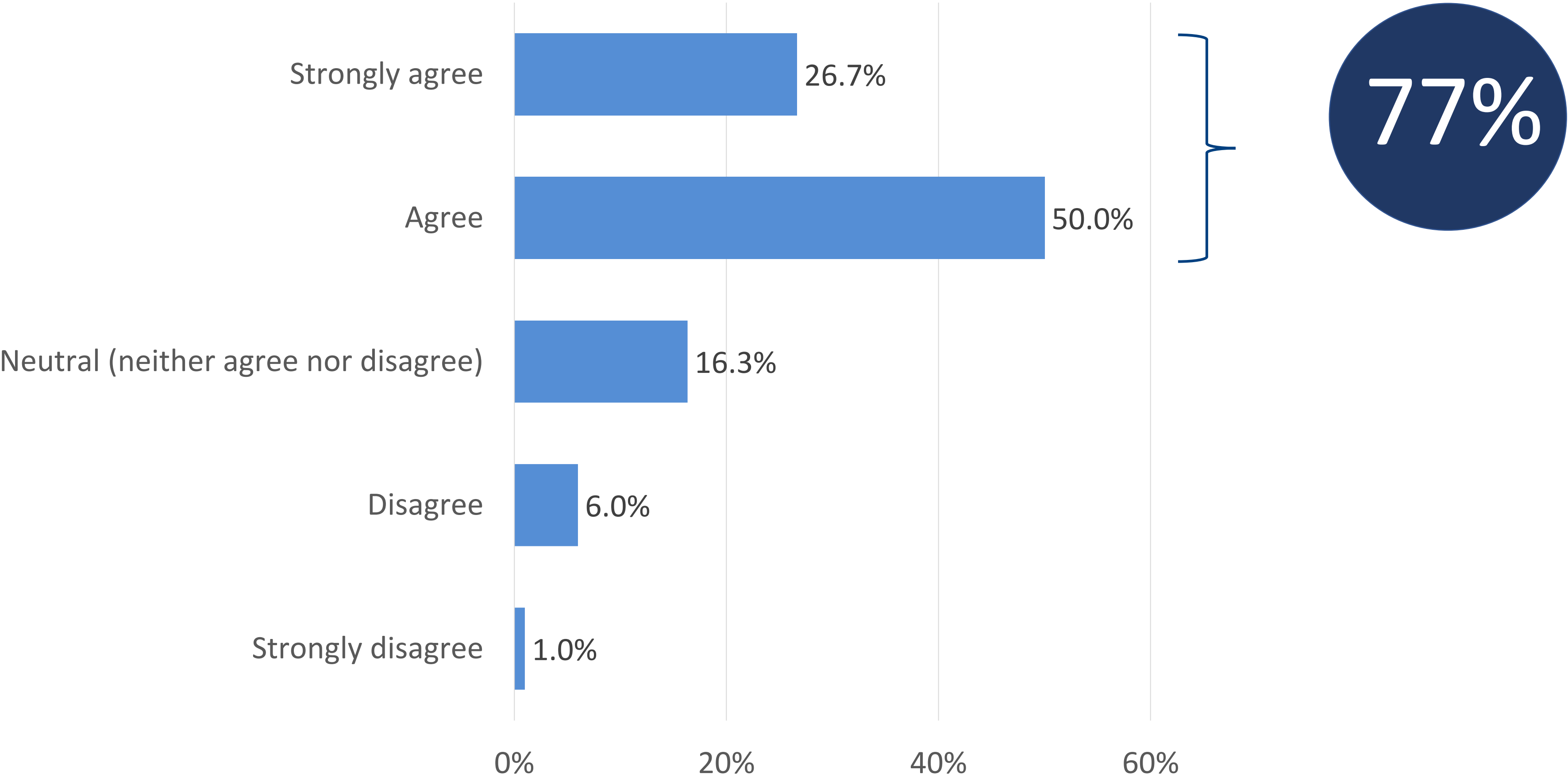


# SOME LIVE MEETINGS WILL NEVER RETURN



Question: Some companies, organizations and conference/meeting attendees will stick with the benefits of virtual meetings. Some percentage of live meetings will never come back post-pandemic.

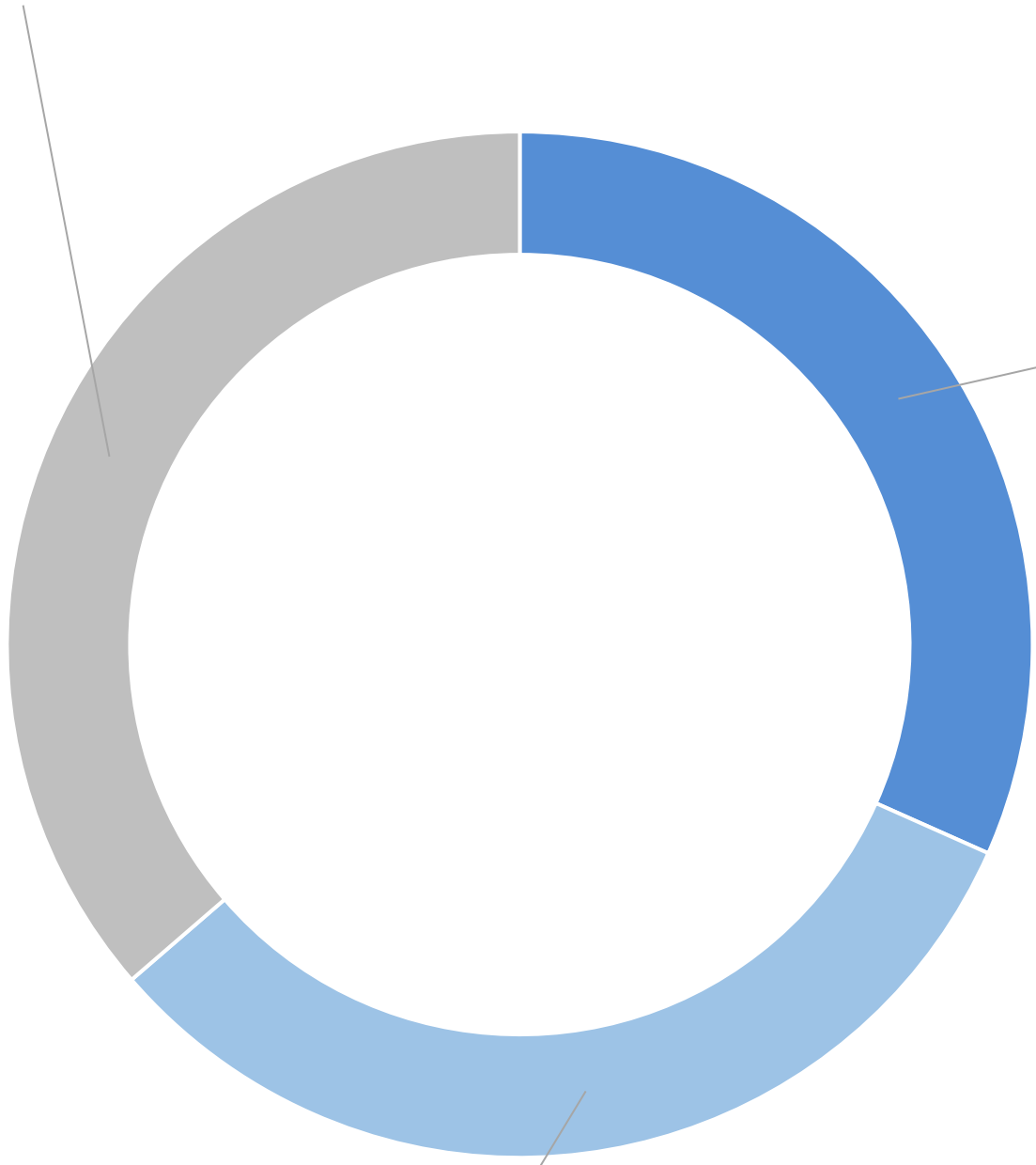
# VIRTUAL/LIVE HYBRID MEETINGS WILL BE THE NORM



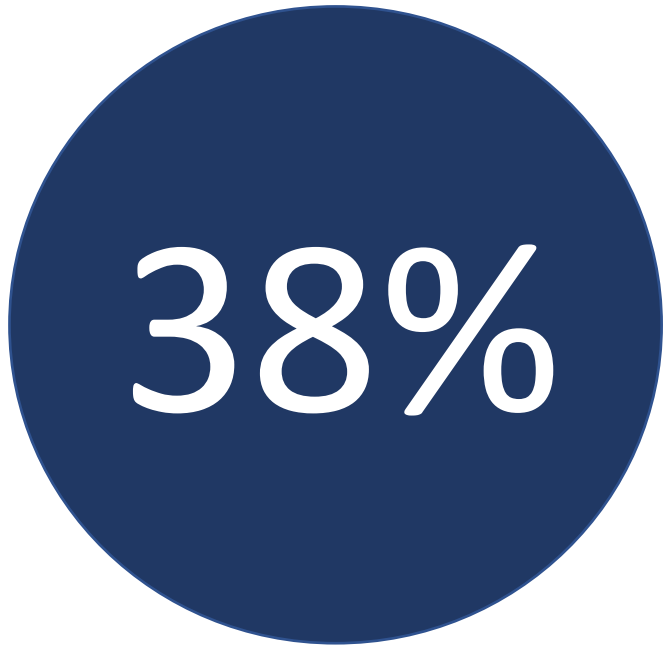
Question: Virtual/Live hybrid meetings will be the norm for the next year.

# CHANGES IN DESTINATIONS SOURCED (NEXT 12 MONTHS)

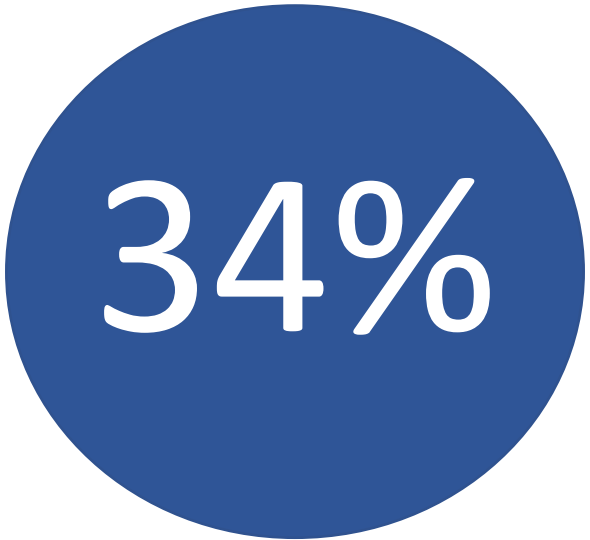
I don't know, 36.3%



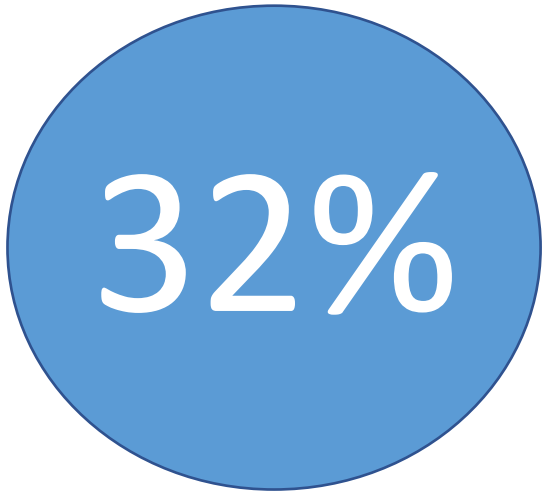
Yes,  
31.7%



CORPORATE



THIRD-PARTY

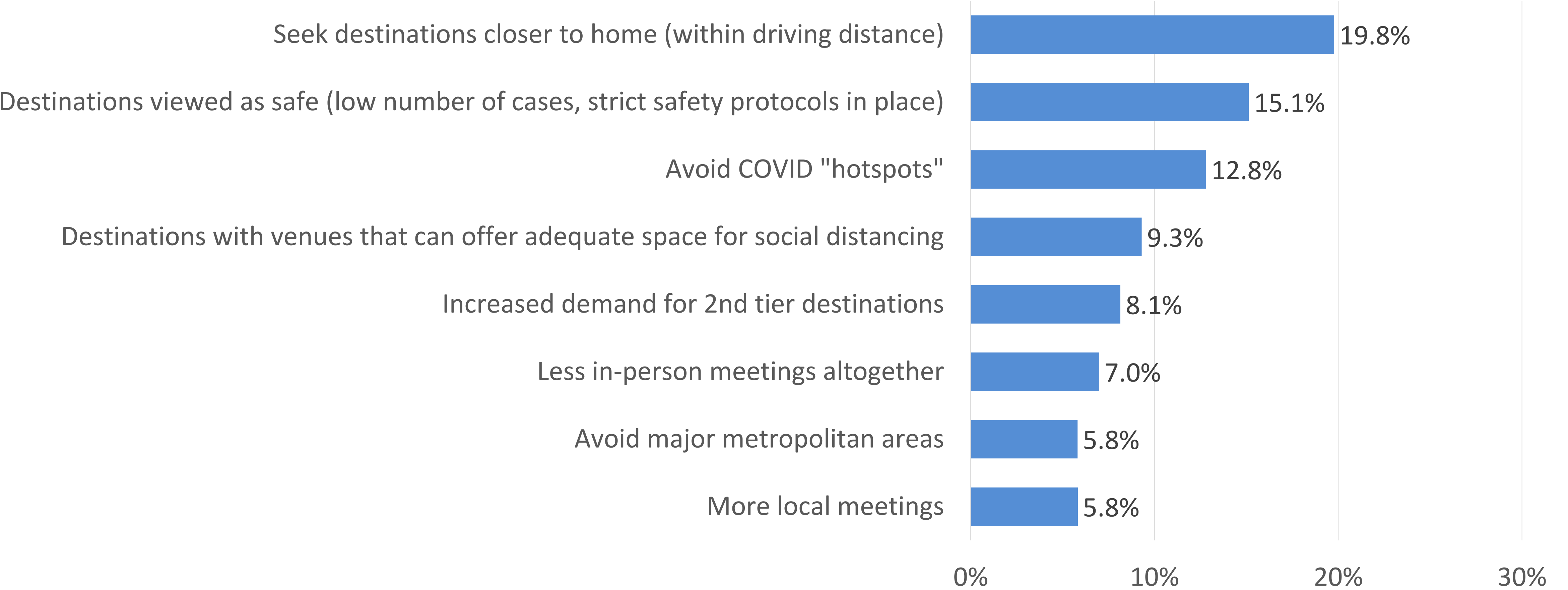


ASSOCIATION

Question: Do you expect that the types of destinations that are selected for your meetings and events will change over the next 12 months? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



# HOW SOURCING WILL CHANGE (UNAIDED)



Question: In a few words, how will this change?

# 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





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

**Send suggestions or requests for questions to:**

**[Info@DestinationAnalysts.com](mailto:Info@DestinationAnalysts.com) &  
[Myha@DestinationAnalysts.com](mailto:Myha@DestinationAnalysts.com)**



# 15-minute presentations for your board and stakeholders

[info@destinationanalysts.com](mailto:info@destinationanalysts.com)





# Resources for Tourism Advocacy & Recovery

[destinationanalysts.com](https://destinationanalysts.com)

# ROI

THIS YEAR ▼ 32.8876  
▲ 42.9841

First quarter  
Jan-Mar

Second quarter  
Apr-Jun

Third quarter  
Jul-Sep

