

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JULY 12TH, 2020

About 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.

In addition to this report, Destination Analysts conducts **The State of the American Traveler** and **The State of the International Traveler**—the travel industry's premier studies for tracking traveler sentiment and global destination brand performance—as well as **The CVB and the Future of the Meetings Industry** annual study helping destination marketing organizations transform their meetings sales and services strategies.



IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor 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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<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

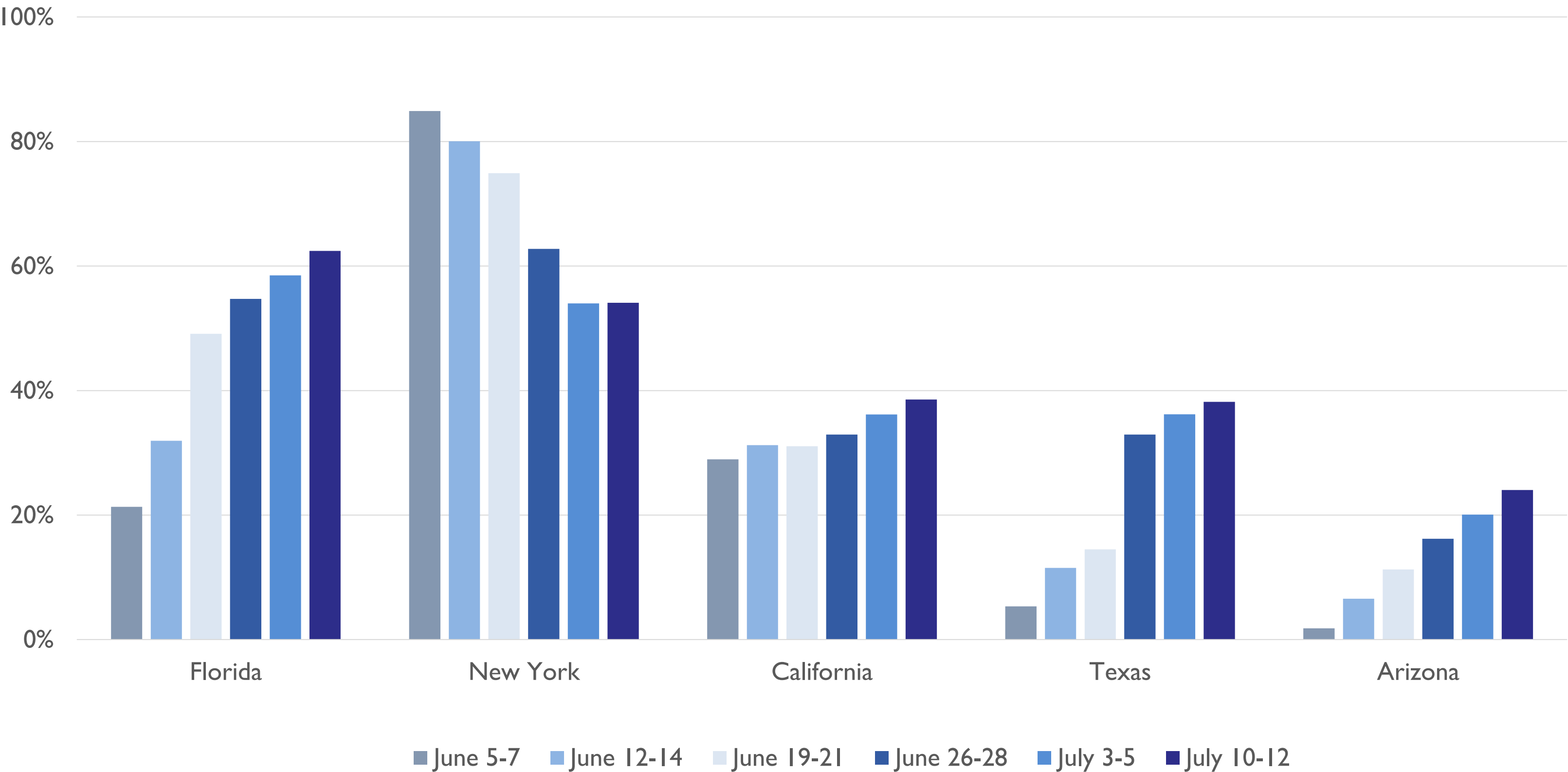
THANK YOU IN ADVANCE

Key Findings for the Week of July 12th

Please cite Destination Analysts when using or distributing this data

Most Talked About Coronavirus Hotspots

In the last few days, several US states have broken their single day records for coronavirus cases—including Florida, Texas and California, who represent three of the most tourist-ed states in the country. These states, along with Arizona and New York, continue to be cited by Americans as the destinations most associated with the conversation around coronavirus issues.



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)

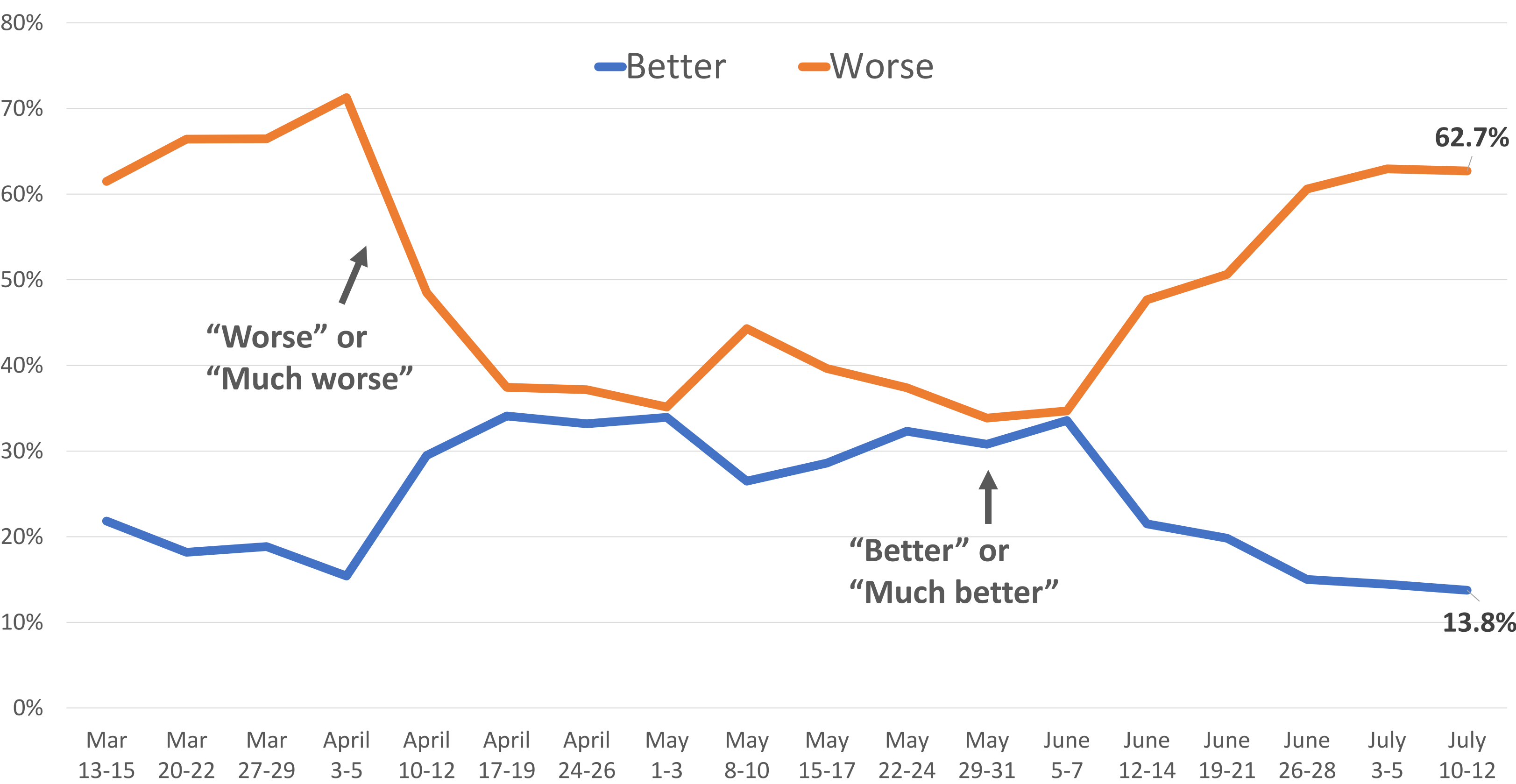
(Base: 1,206, 1,205, 1,199, 1,224, 1,354 and 1,212 completed surveys. Data collected May 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Expectations for the Coronavirus Outbreak

The impact of COVID-19’s surge can be felt across the American mentality. A record low 13.8% of American travelers feel the pandemic will get better in the US in the next month; instead nearly two-thirds feel it will get even worse.

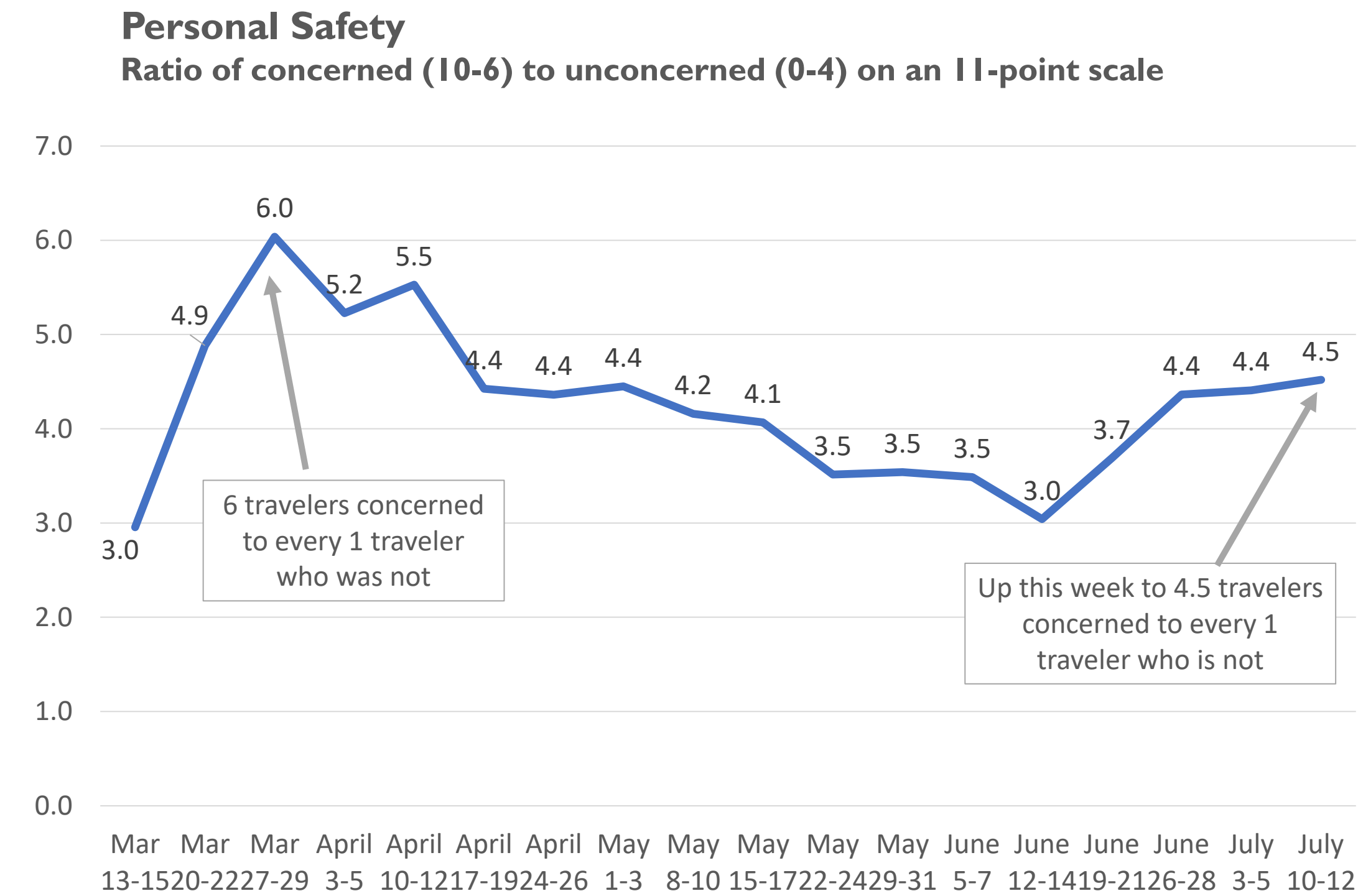
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)
In the next month the coronavirus situation will _____

(Base: All respondents, 1,201, 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 1,213 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)



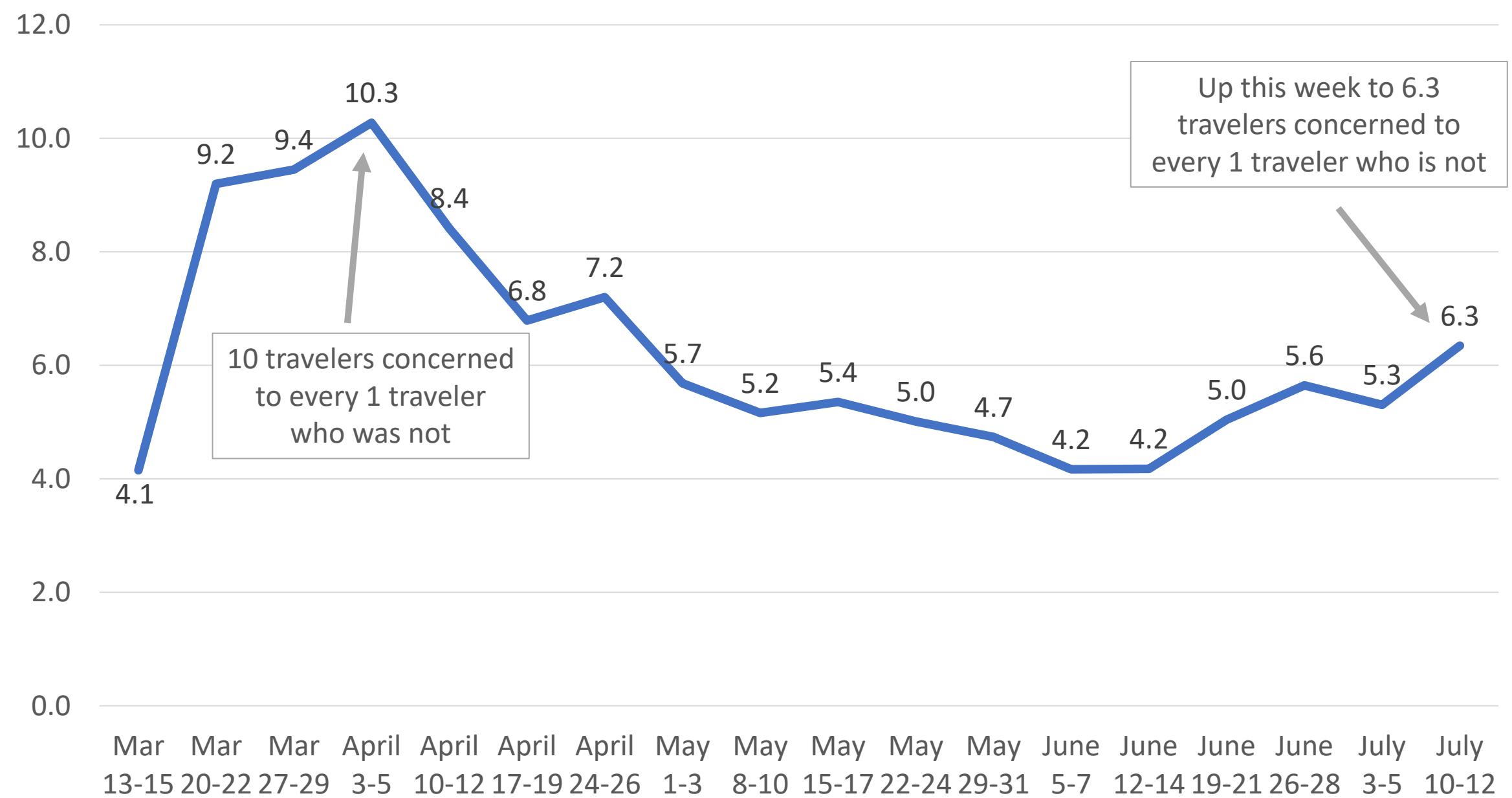
Personal Health Concerns & Concerns About Family & Friends

The proportion of American travelers highly concerned about personally or friends/family contracting COVID-19 is the highest it has been in three months. Financial security from the virus is also off from the lows recorded at the start of June.



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: 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)



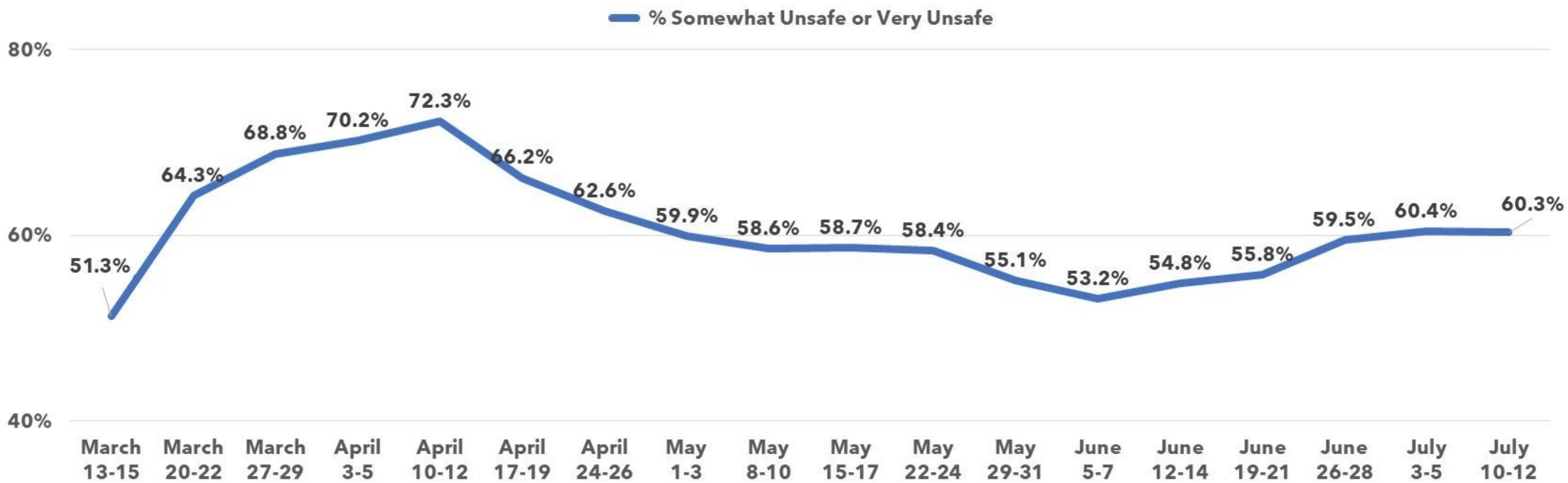
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 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)

The perception of travel related activities being unsafe has risen to mid-April levels, and the percent agreeing they will be traveling in the Fall has dropped to 35.7%, when it was near 50% only weeks ago on June 5th. Now a record 41.5% of American travelers say they have no leisure trip plans for the remainder of 2020.

PERCEIVED SAFETY OF TRAVEL ACTIVITIES
(AVERAGE UNSAFE SCORE FOR ALL ACTIVITIES TESTED)



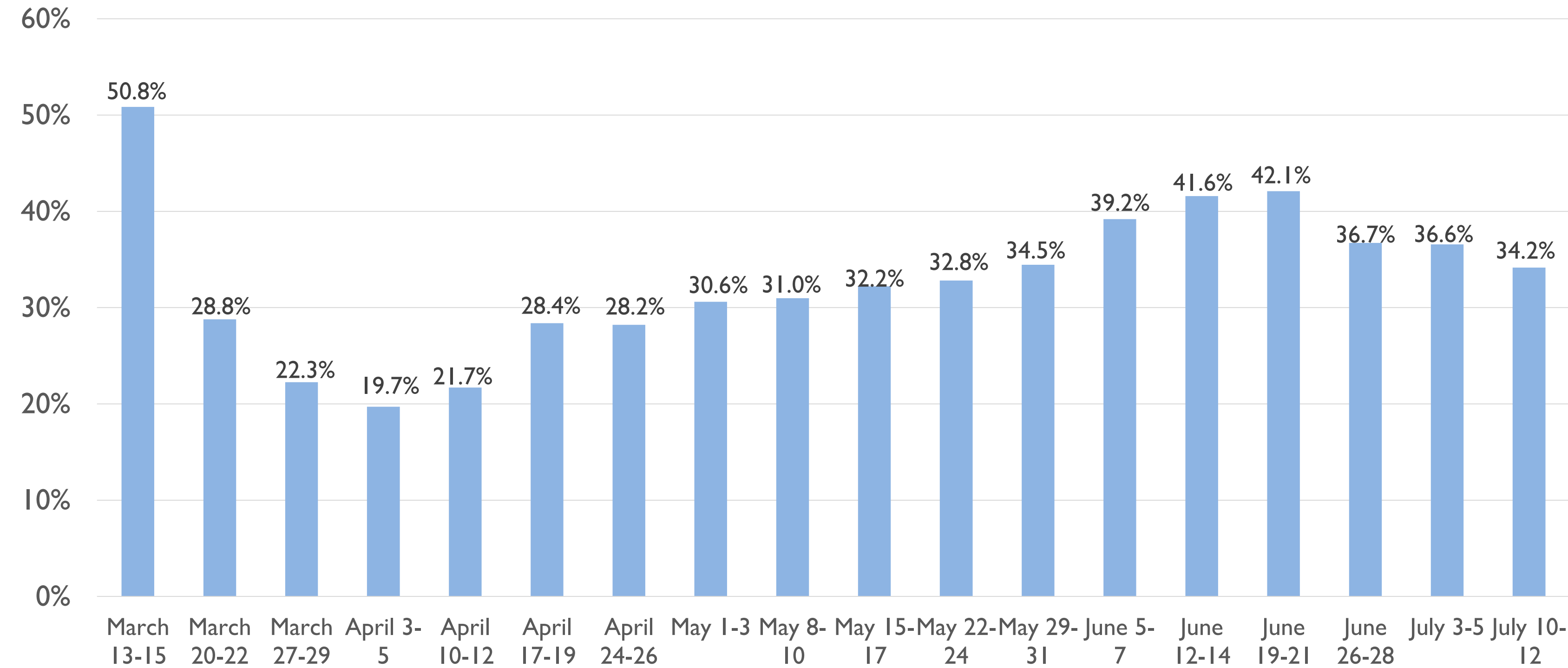
Question: At this moment, how safe would you feel doing each type of travel activity?

(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 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)

Comfort Enjoying Home Community

When it comes to tourism in their own communities, while nearly 60% say they will take a staycation this summer, the number who feel safe going out for leisure activities locally has declined to 34.2% from 42.1% just three weeks ago (June 19th).

Americans Who Feel Comfortable Going Out into Their Community



Question: 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.

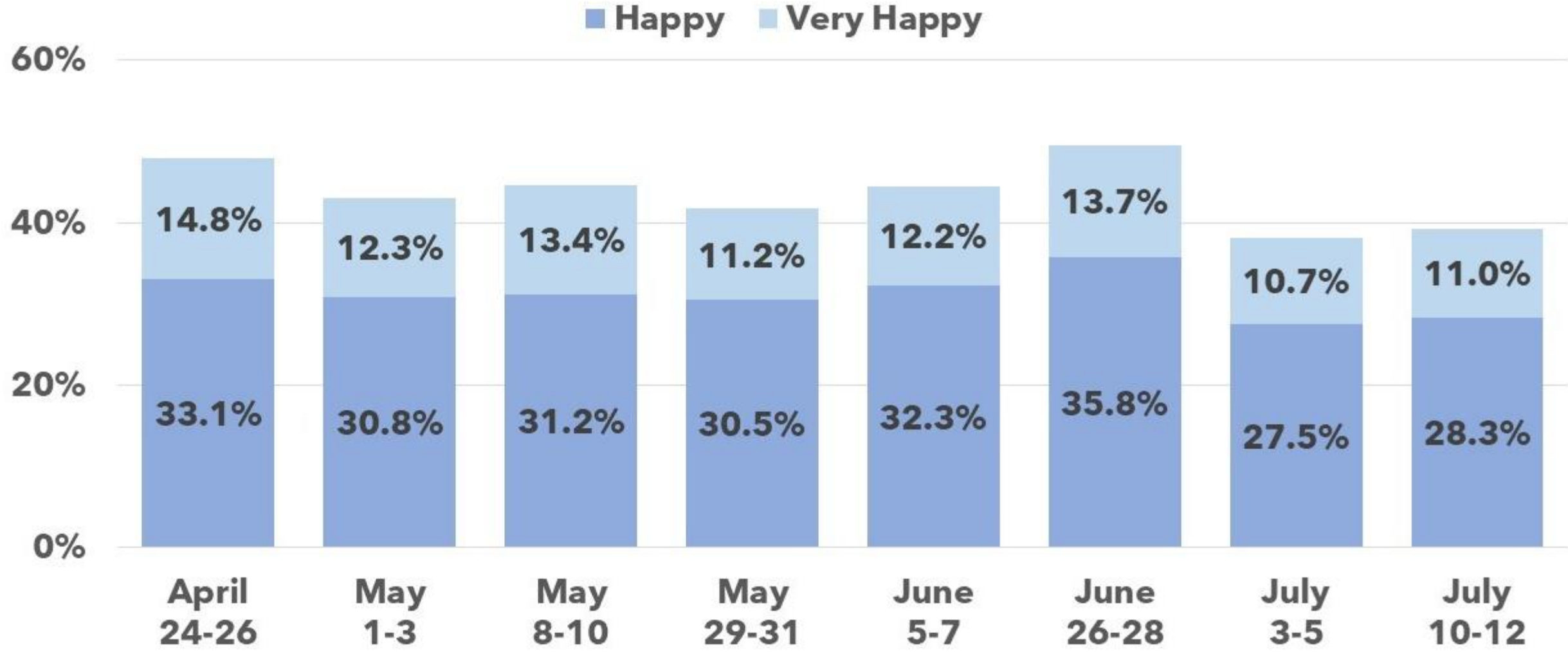
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21,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

Advertising Their Own Communities

A majority of American travelers continue to say that too many people in their communities are not wearing face masks and not maintaining the appropriate social distance in public. **Thus, the percent of Americans who say they would be happy to see an ad promoting their community for tourism when it's safe, remains depressed below 40%.**



ADVERTISING THEIR OWN COMMUNITIES FOR TOURISM (APRIL 24 - JULY 12)



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?

(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)

COVID-19's Impact on Ability to Experience Travel Priorities

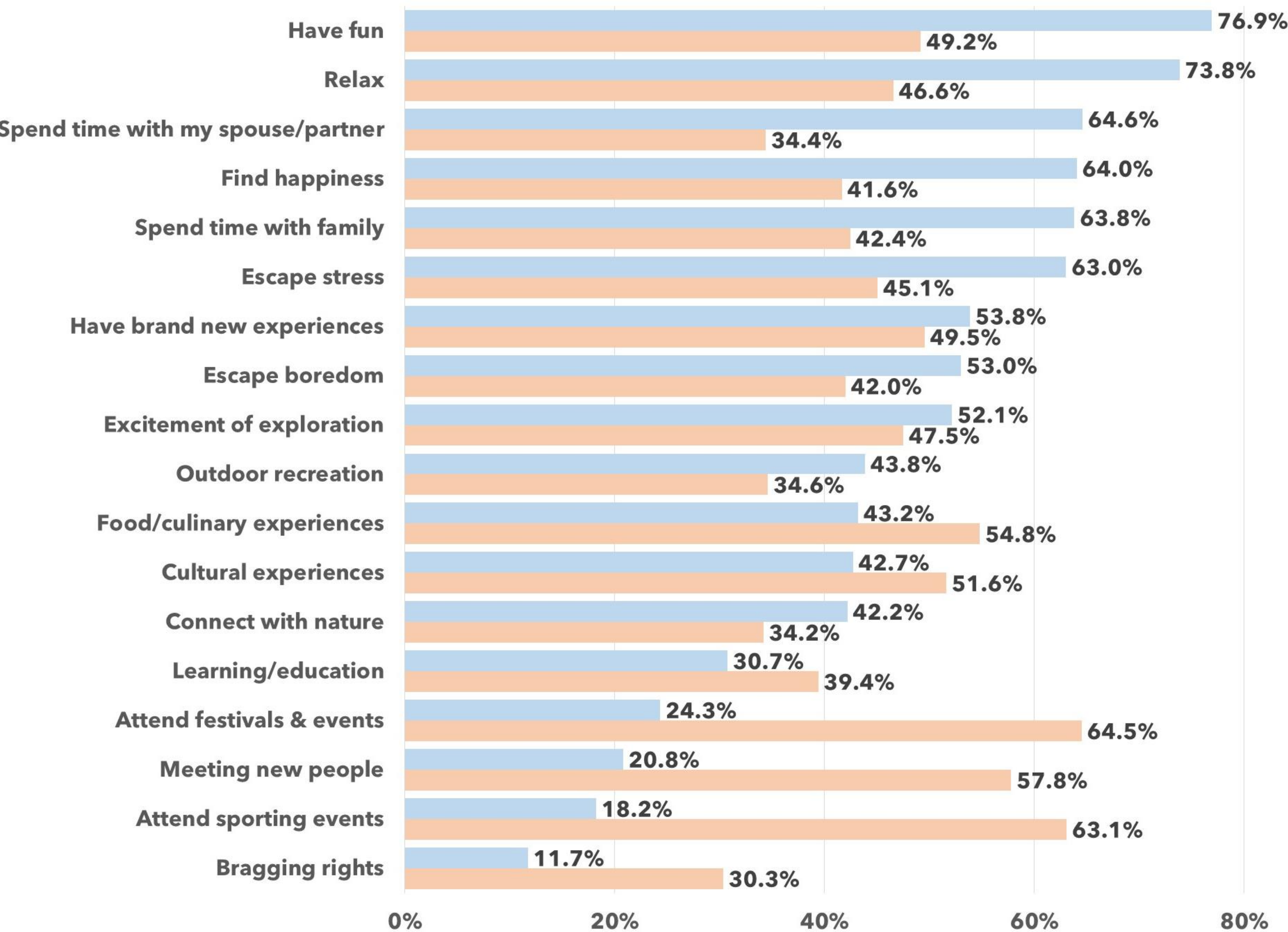
In addition to wreaking havoc on their sense of safety, Americans feel the virus has made travel's ability to deliver fun and relaxation, as well as culinary and cultural enrichment, especially difficult, if not impossible. The chart at right shows the percent of Americans who rated each of these experiences a critical or high priority to them for travel and the percent who said the coronavirus situation would have a significant effect—or make impossible—their ability to have these experiences while traveling for leisure this year. While it is expected that travelers feel the pandemic challenges their ability to experience events and meet new people, it is surprising to see how many feel expected travel benefits like exploration and escaping stress are also challenged by COVID-19.

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.

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.)

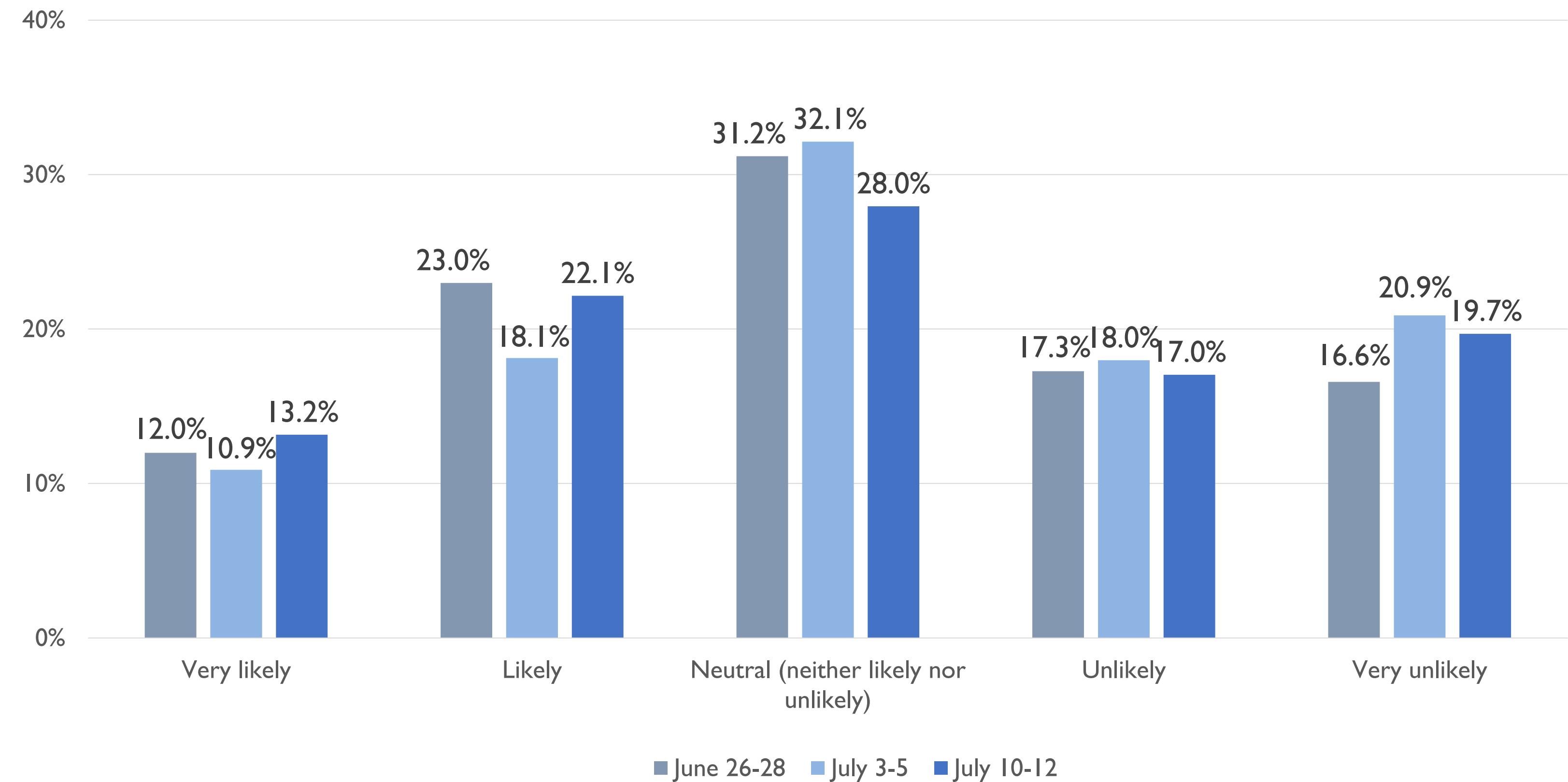
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

COVID-19'S IMPACT ON ABILITY TO EXPERIENCE TRAVEL PRIORITIES
TOP 2 BOX SCORE: CRITICAL IMPORTANCE OR HIGH IMPORTANCE TO LEISURE TRAVEL
TOP 2 BOX SCORE: COVID-19 HAS SIGNIFICANT EFFECT OR MAKES IMPOSSIBLE



Potential for Near-Term Conversion

Marketing safe travel in this environment thus poses many challenges—although opportunity exists. Now 11.0% say they are already in a “back traveling” state of mind; and another 11.1% say they are ready to travel with no hesitations. In addition, 35.3% say they could be convinced to take a trip this year that they hadn’t previously considered.



Question: IN THE NEXT 3 MONTHS, if a good opportunity presented itself, how likely would you be to take a leisure trip THAT YOU HAVEN'T ALREADY CONSIDERED?

(Base: All respondents, 1,231, 1,364 and 1,213 completed surveys. Data collected June 26-28, July 3-5 and 10-12, 2020)

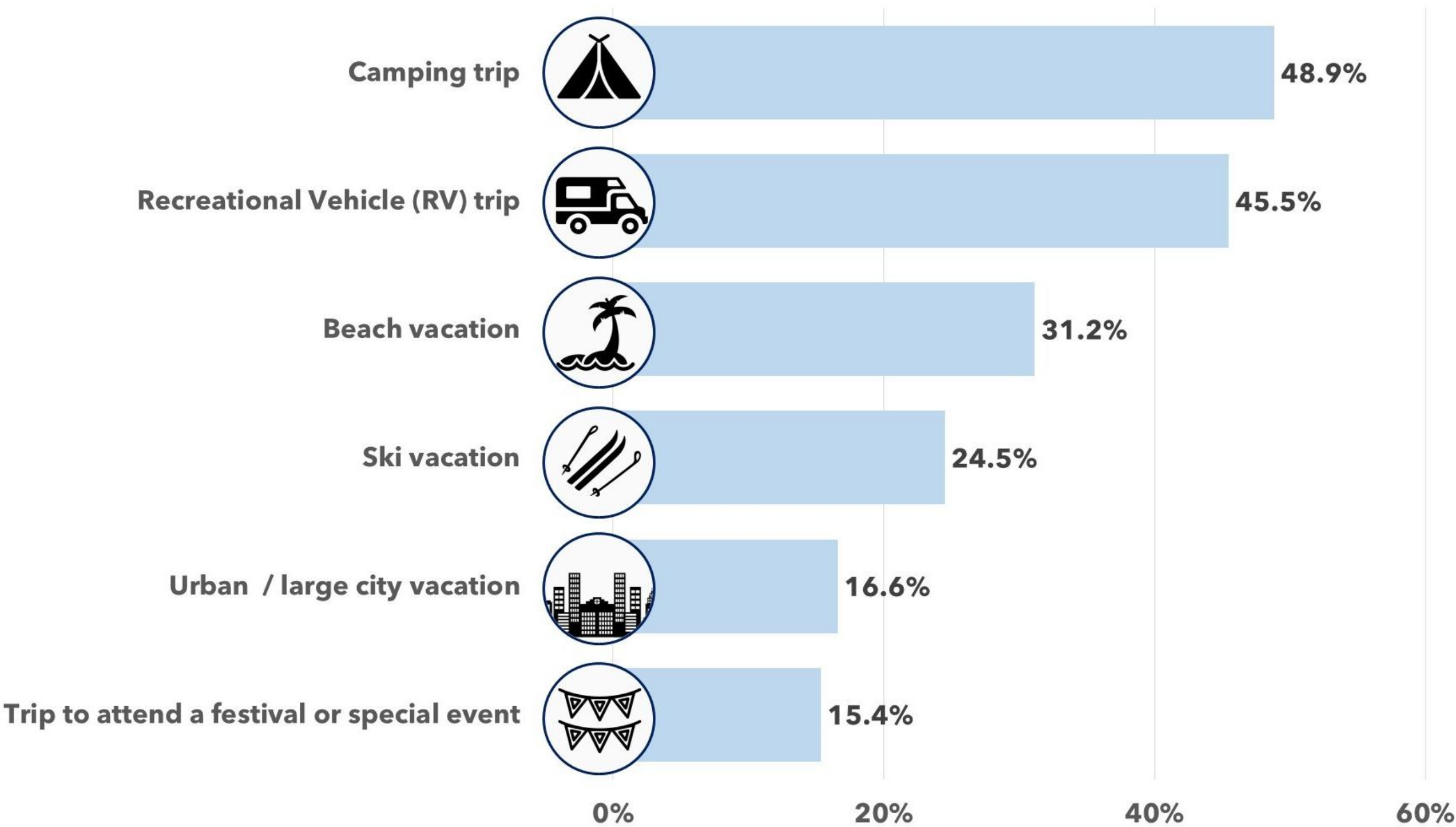
Perceived Safety of Trip Types

Americans agree the safest types of trips one could take this year are camping and RV trips. Across metrics, travelers in the Millennial or GenZ generations continue to exhibit less fear and hesitation and more openness and readiness to travel now. Men—particularly those with household incomes above \$80K—also continue to index more highly for travel marketability compared to women.

Question: Now use the same scale to 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)*

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



Travel Tax Credit: Likelihood to Generate Incremental Travel

Policy may have a place as a travel stimulus, as well. When American travelers were asked about the potential of a travel tax credit for their leisure travel expenses, 44.6% agreed this would increase their likelihood of taking a trip they had not previously considered.



Question: How much do you agree with the following statement?
Statement: Having this Travel Tax Credit in place would increase my likelihood of taking a trip that I had not previously considered.

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



Coronavirus Travel Sentiment Index

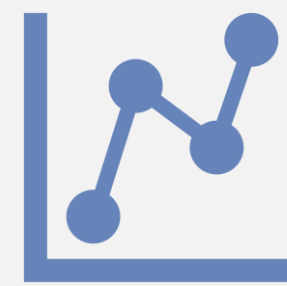
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 12th

What is a Predictive Index?



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



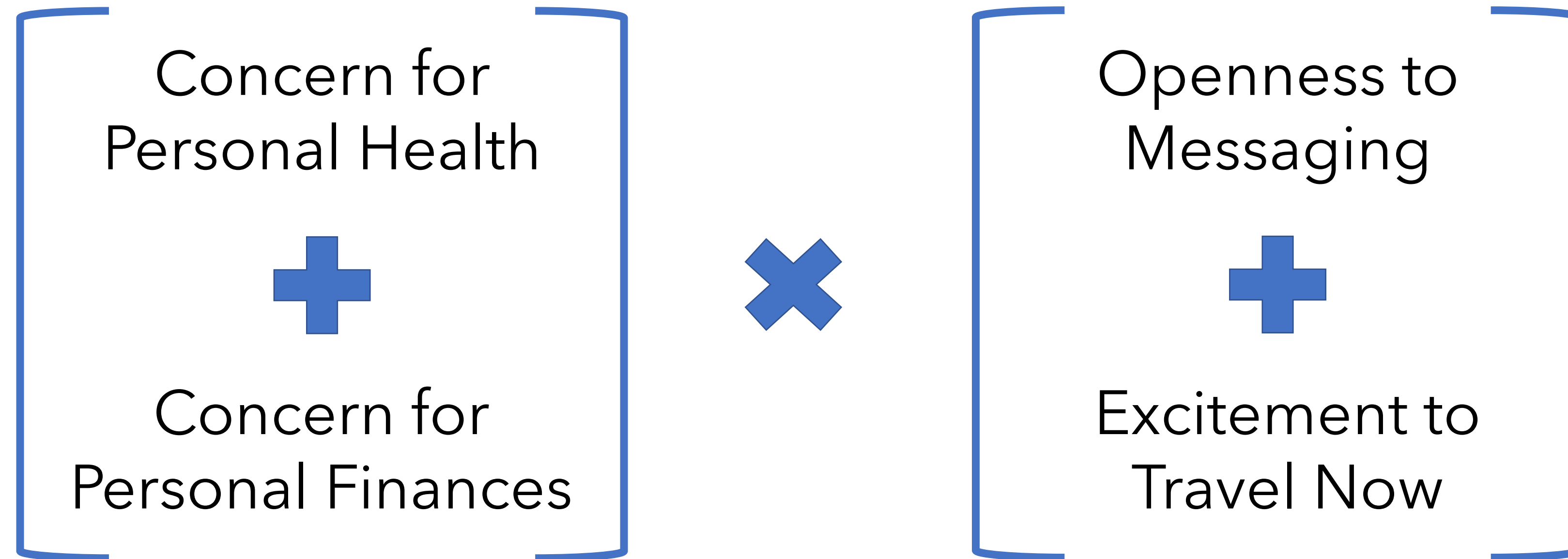
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

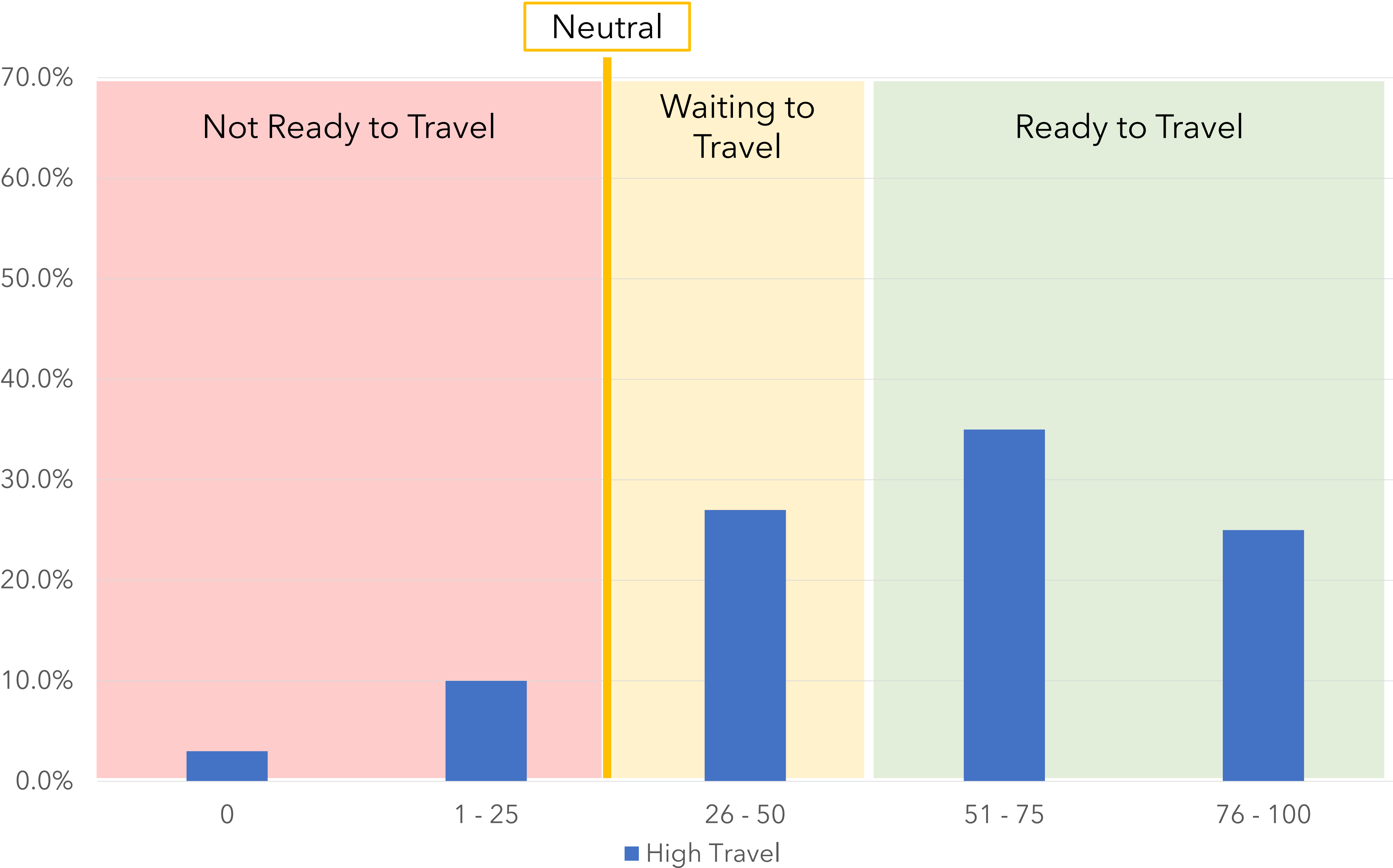
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

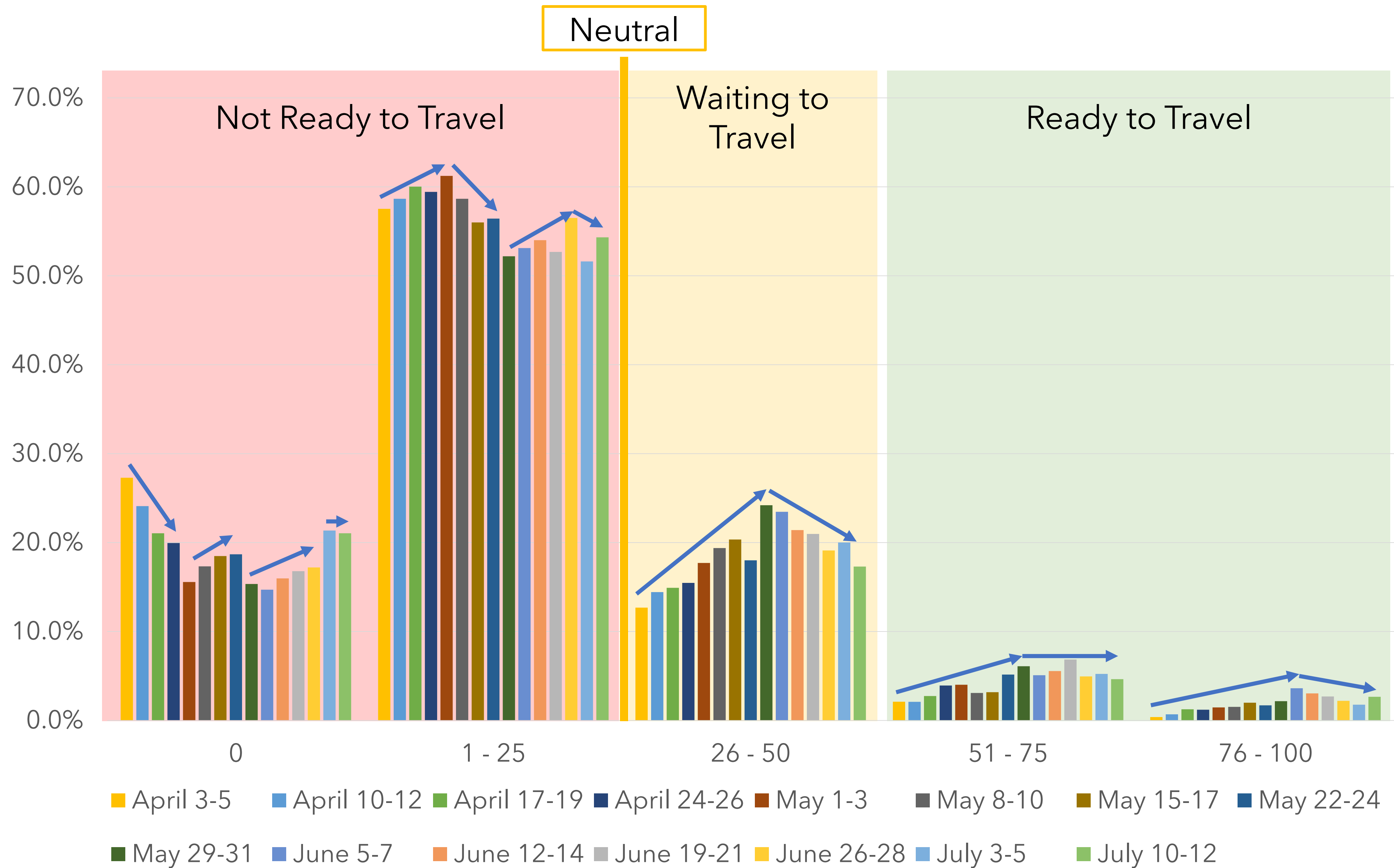


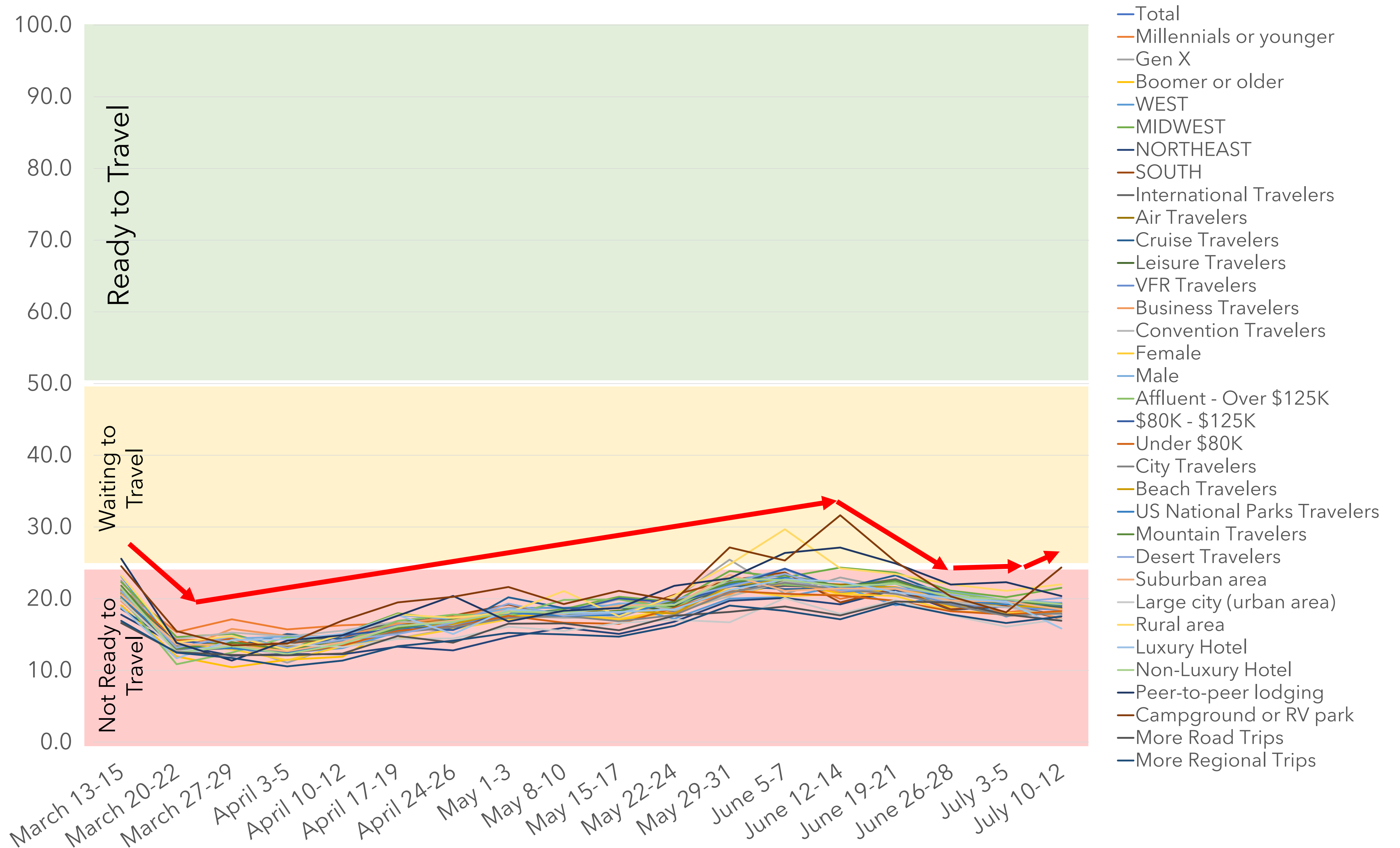
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook

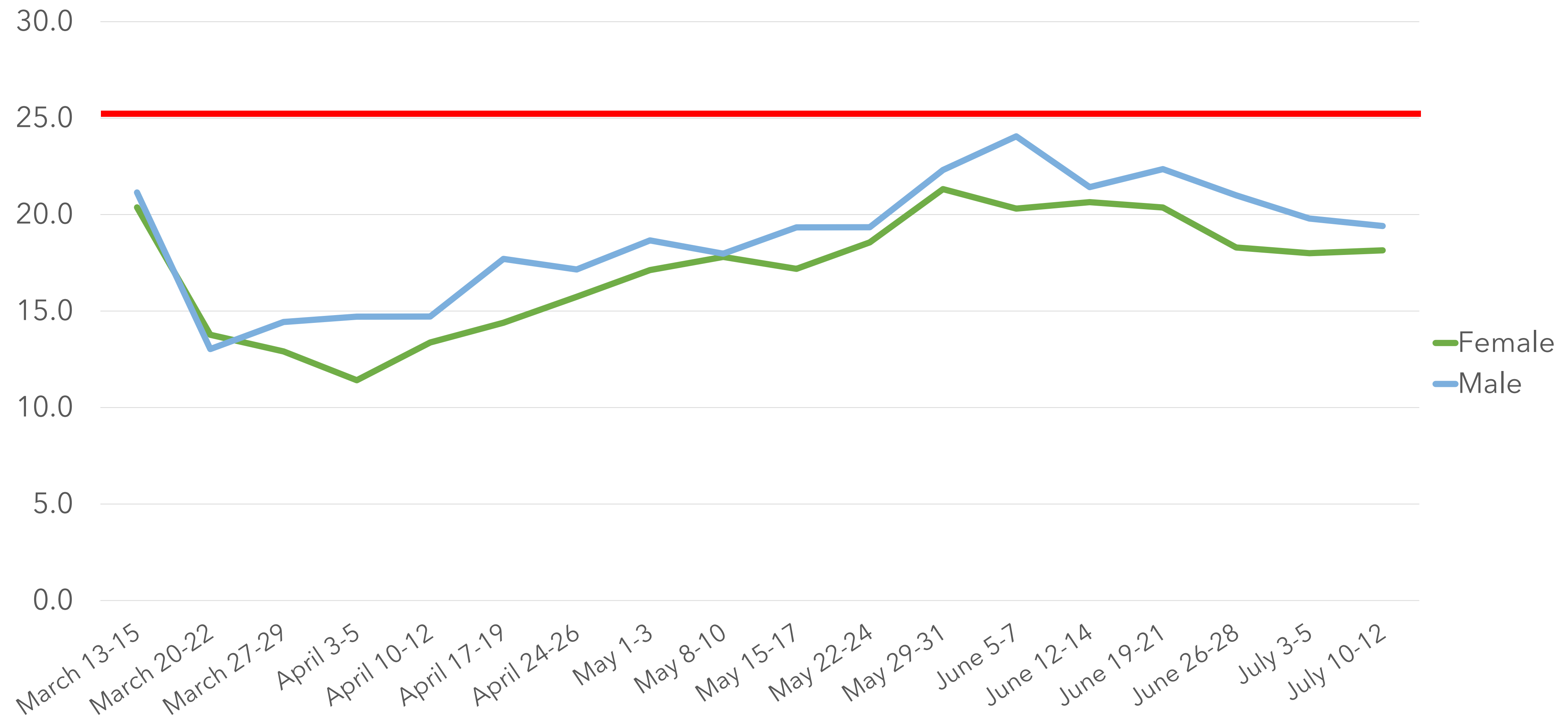




Gender

Points of Interest:

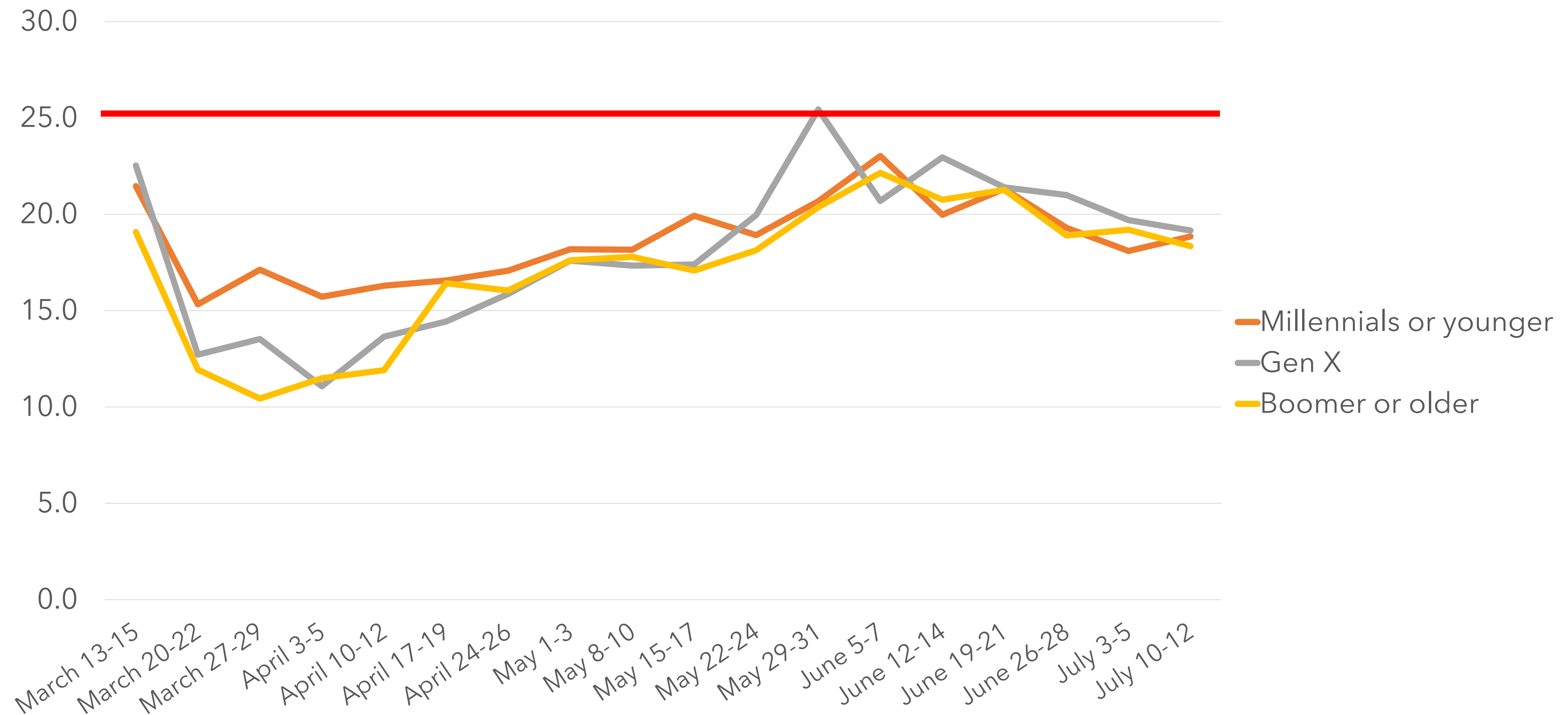
- Safety concerns stayed consistent for both Men and Women this week.
- This week 45.3 percent of Women reported they have no plans to travel in 2020 (up from 41.2% last week).
- About a quarter of Men again this week (23.7%) said they are already traveling or ready to travel with no hesitations (compared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



Generation

Points of Interest:

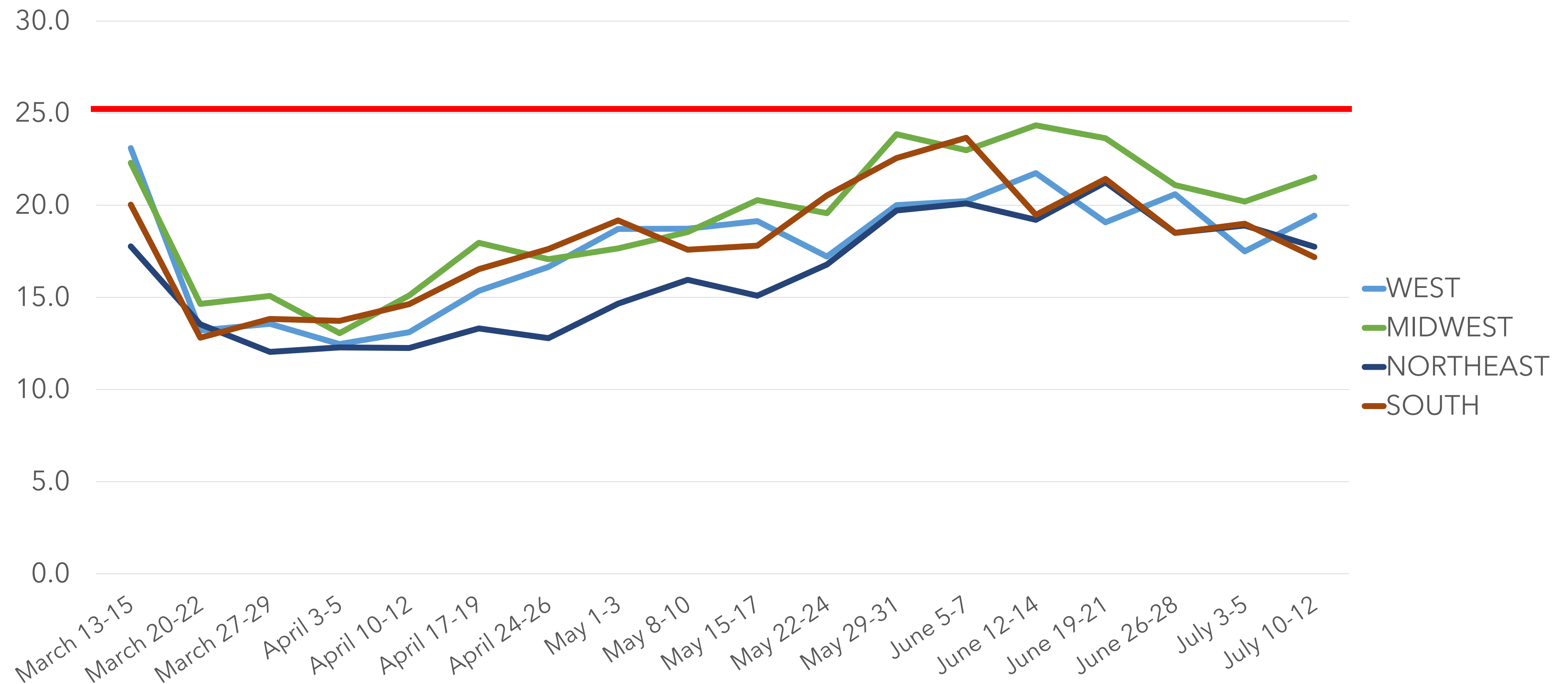
- Gen X continued to index higher than the other generations this week by a small margin.
- Boomers showed a slight increase in safety concerns this week compared to the other generations.
- About a third of Millennials reported they would be happy to see an ad promoting their community for travel.



US Region

Points of Interest:

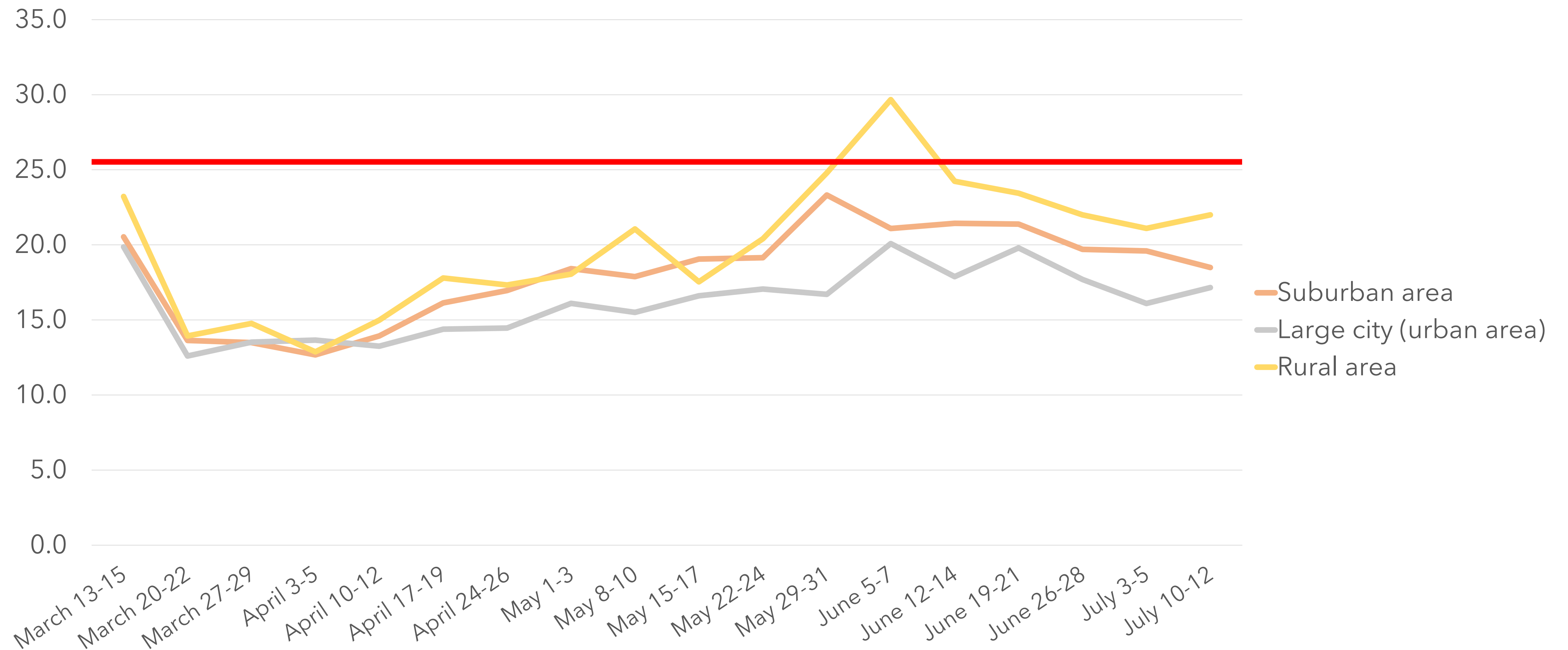
- The Midwest continued to index highest amongst US regions and saw a notable increase this week.
- The West and Midwest regions showed a slight decrease in safety concerns this week.
- The Midwest showed the most excitement for travel and openness to travel messaging this week.



Type Of Residence

Points of Interest:

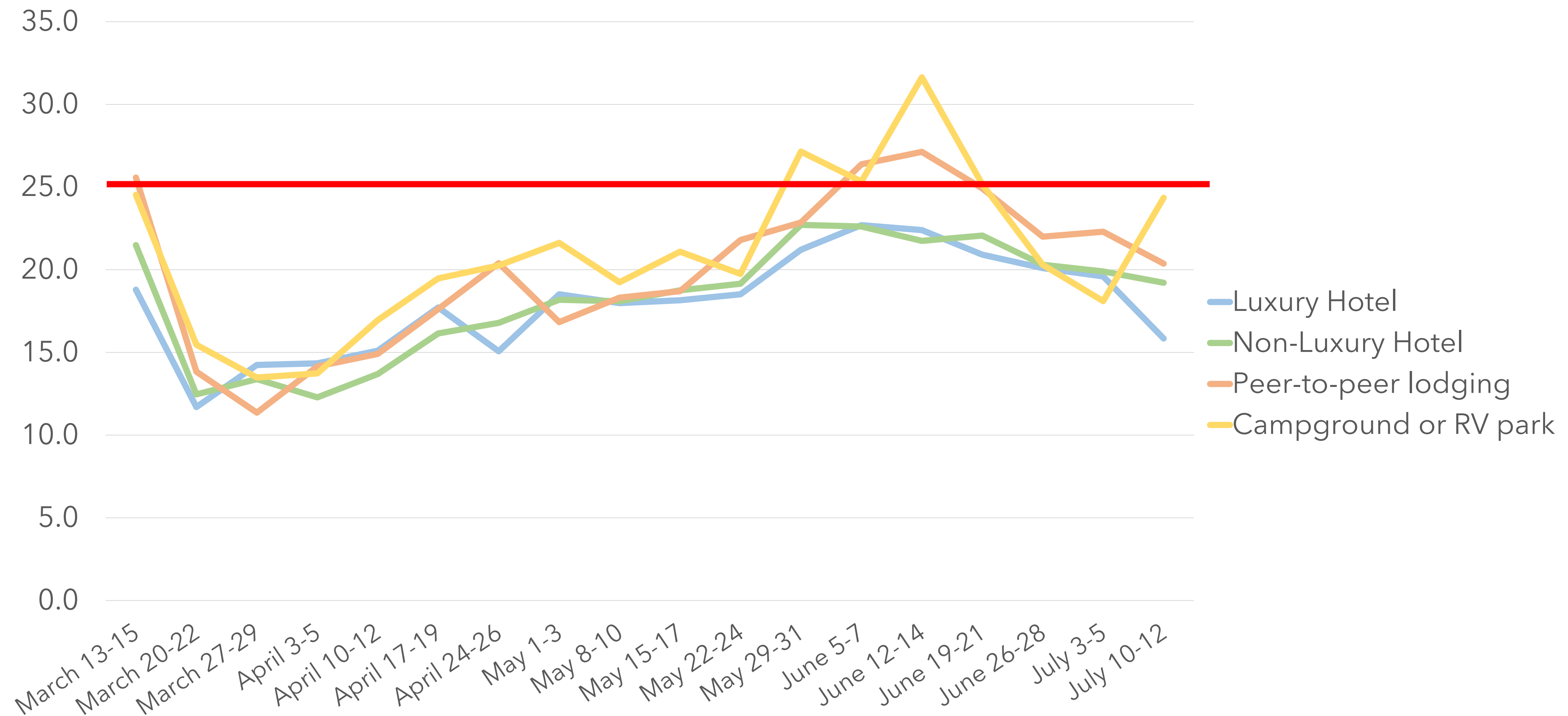
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Suburban respondents reported a slight increase in safety concerns this week.
- Urban respondents were the most likely to report a Federal tax credit would increase their likelihood of taking a trip.



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.





Questions?
Need More
Information?

- We're here for you. Please email us at info@destinationanalysts.com.
- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>

In Their Words: Black Travelers on the State of Travel

During our webinar on July 7th, 2020, Robin McClain, SVP of Marketing & Communications at Destination DC, led a panel of black travelers in conversation about their travel experiences and what the travel industry can do to market and make travel an equally inclusive leisure activity. Below are a few quotes we heard from the panelists:

- *"If there is a fighting chance that someone is going to look like me, I'm going to dig a little bit deeper and see what they offer."*
- *"That is certainly something that I look into exploring and researching: if a country or a destination or city is friendly or welcoming to African Americans."*

The complete blog post can be accessed at:
<https://www.destinationanalysts.com/blog-in-their-words-black-travelers-on-the-state-of-travel/>



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