

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JULY 26TH, 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



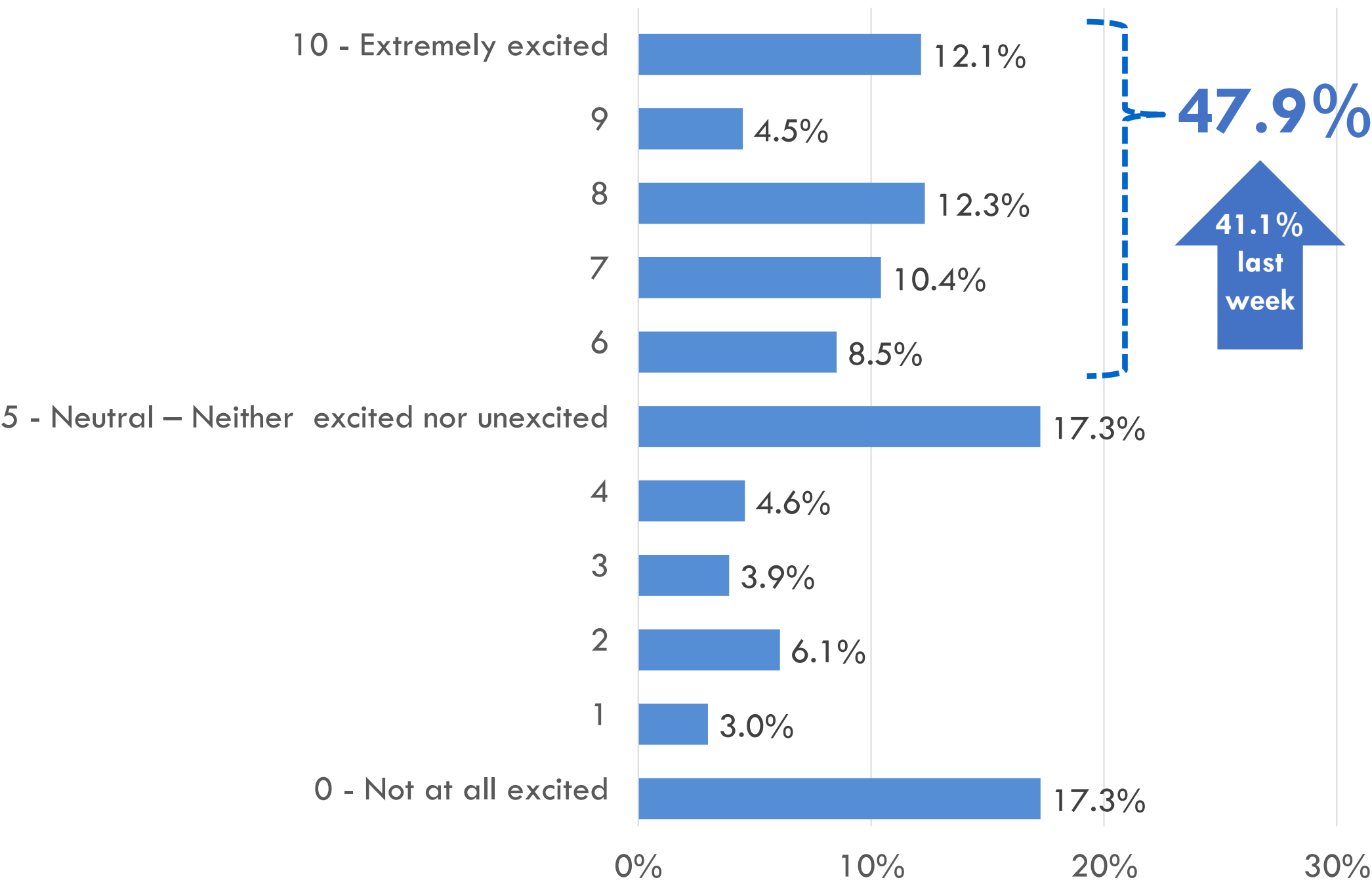
Key Findings for the Week of July 26th

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Excitement for Travel & Openness to Travel Inspiration

Despite 61.5% of American travelers feeling that the pandemic will worsen in the US over the next month, there was positive improvement in some travel sentiment metrics this week. Higher excitement levels for near-term travel increased to 47.9% from 41.1%, and greater degrees of openness to travel inspiration grew to 45.2% from 36.6%.

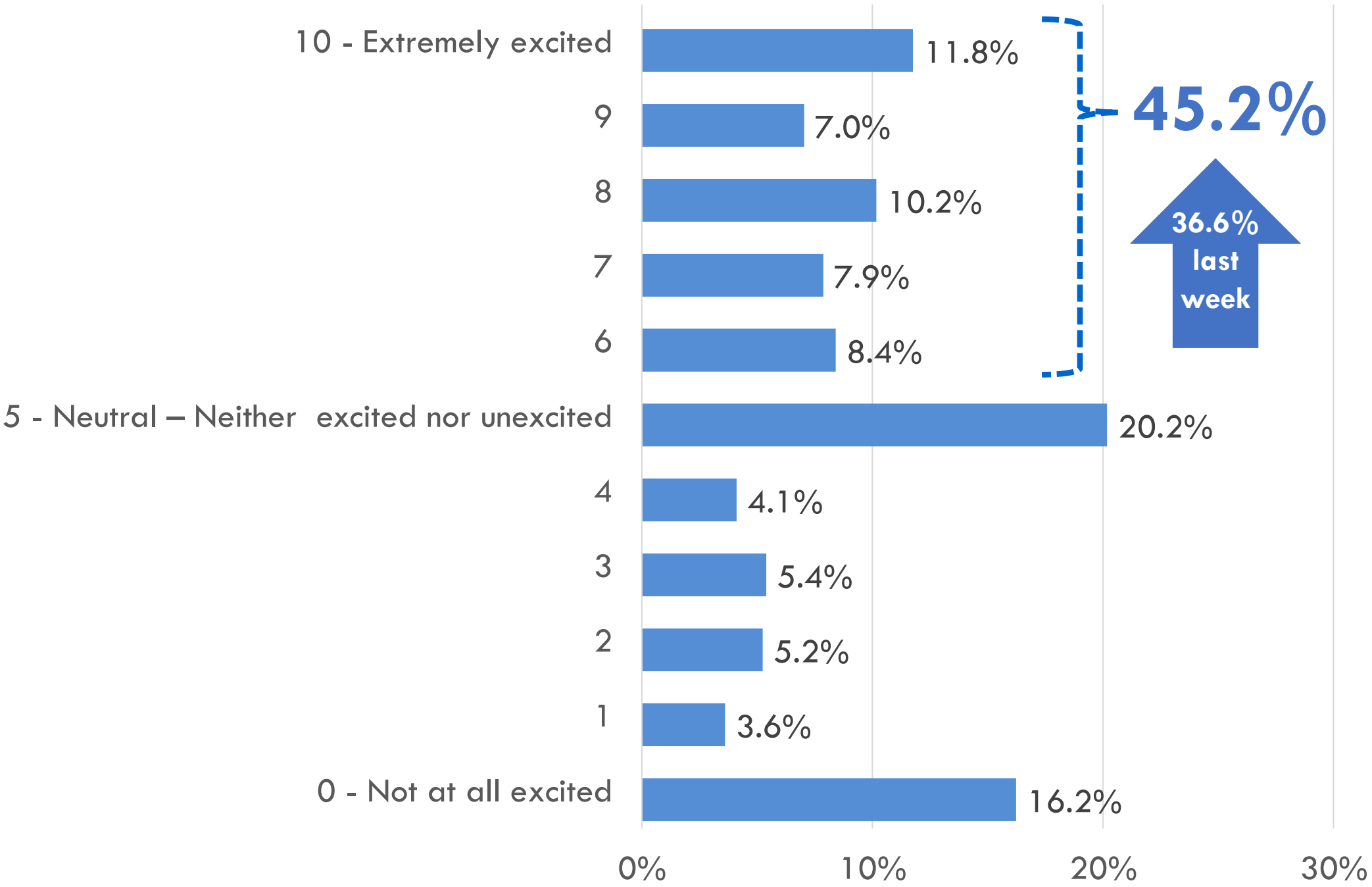
Excitement to Travel Now



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, 1,206 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 July 24-26, 2020)

Month of Next Road Trip & Air Trip

Now 55.4% say they have at least tentative trip plans for the remainder of 2020, up from 53.3%. Looking at the anticipated timing of their next trips, 18.2% of American travelers expect they may take their next road in August.



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

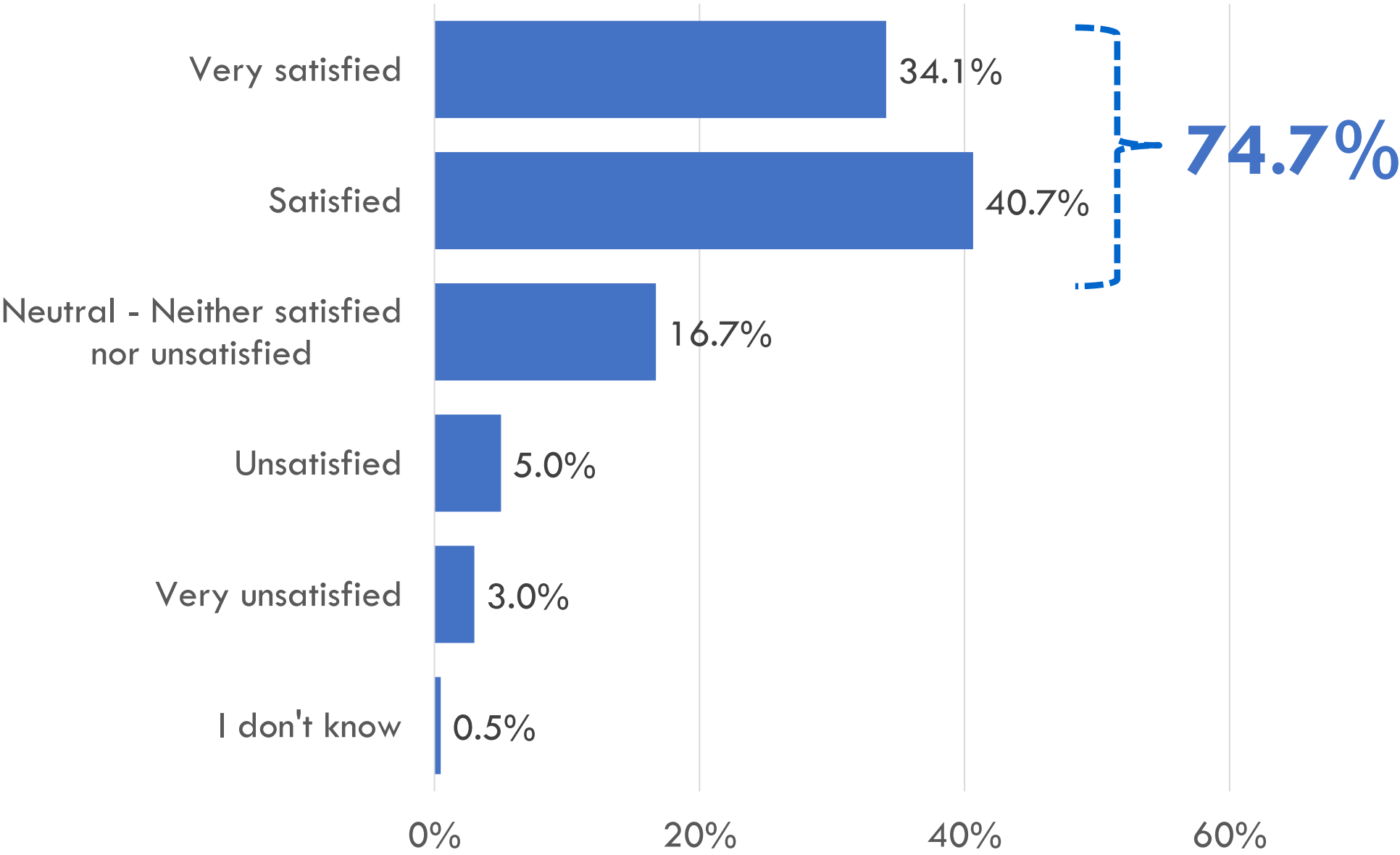
Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

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

Satisfaction with Airlines & Airports

While the majority of Americans report taking their next trip by air in 2021, those that have recently traveled by air (11.3%) largely rate their experience from a health and safety protocol standpoint as positive. Three-quarters of these recent air travelers said they were satisfied with the coronavirus safety protocols put in place by the airline(s) and 73.0% felt satisfied by those protocols instituted by the airport(s). The profile of those that recently traveled by air skews younger, urban dwellers that typically traveled for business and conventions in the pre-pandemic period.

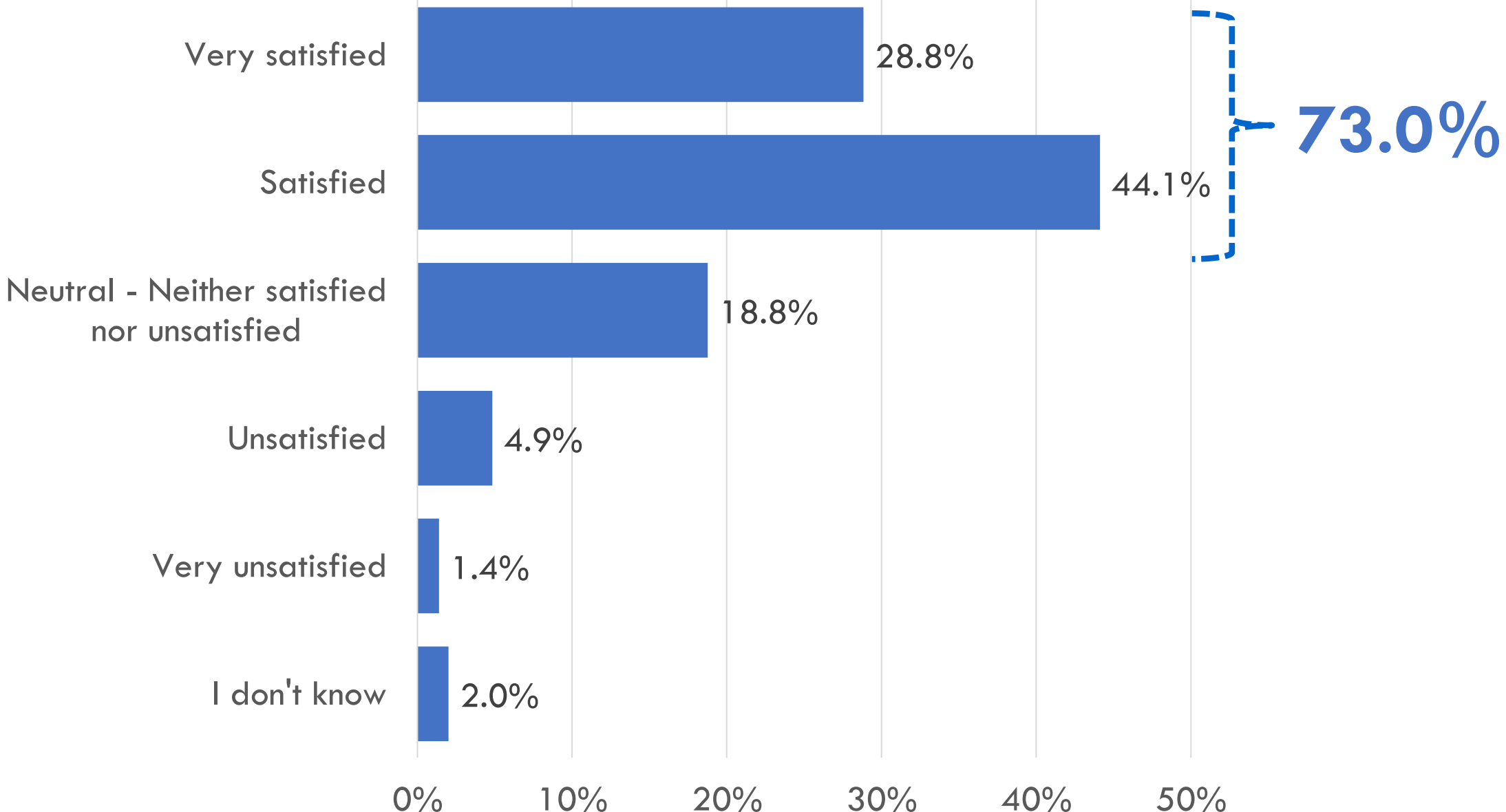
Satisfaction with Airlines



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)

Satisfaction with Airports

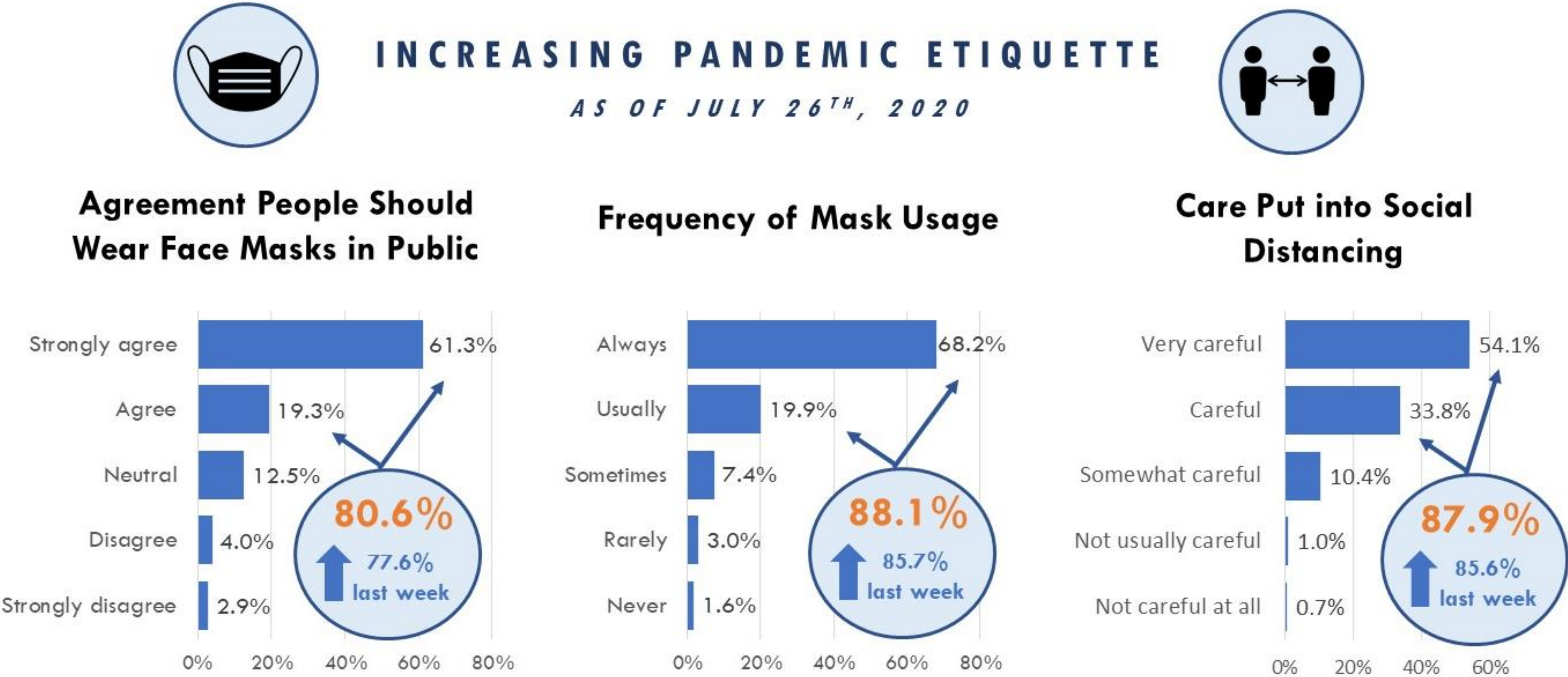


Question: Please think about YOUR MOST RECENT FLIGHT. Overall, how satisfied are you with THE CORONAVIRUS SAFETY PROTOCOLS put in place by the airport(s) to protect your health during your travels?

(Base: Wave 20 data. Respondents traveling by air in past 2 months, 133 completed surveys.
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Increasing Pandemic Etiquette

More Americans are now agreeing with pandemic etiquette. This week, 80.6% of American travelers agreed people should wear face masks in public, up from 77.6% last week, and 87.9% up are being careful to socially distance, up from 85.6%. The reported frequency of mask wearing has also increased.



Question: How much do you agree with this statement? In this environment, people should wear face masks when they are in public.
Question: How often do you personally wear a mask when going out in public? (Select one)
Question: When you are in public, how careful are you generally to keep an appropriate distance between yourself and others? (Select one)

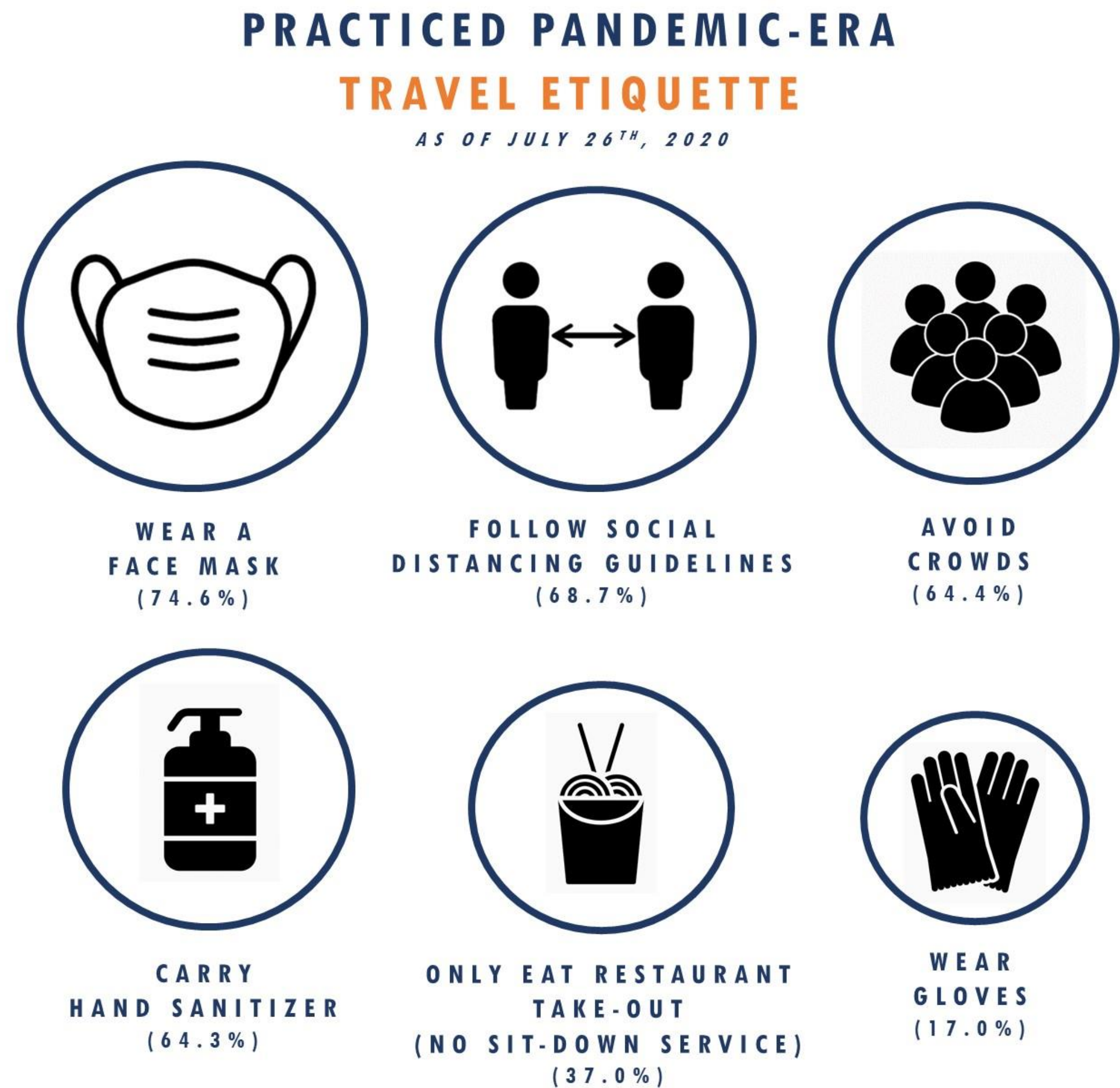
(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)

Practiced Pandemic-Era Travel Etiquette

Americans also increasingly say they will practice pandemic etiquette when traveling over the next six months, including wearing a face mask and following social distancing guidelines.

Question: If you were to take a trip in the next six months, which would you be likely to do? (Select all that apply)

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



Pandemic Stress & Travel Morale

Nevertheless, Americans feel marked stress from the pandemic. Overall, 44.8% report higher degrees of daily stress right now. Millennials seem to be absorbing this stress in more areas of their lives compared to older generations, being likelier to say they have felt lonely, sad, bored, easily upset, and worn out in the last month. This stress is a parasite on travel morale. Six in ten American travelers agree that if they were to travel now for leisure, they would not be able to fully enjoy it and half agree they have lost their interest in or taste for traveling for the time being.

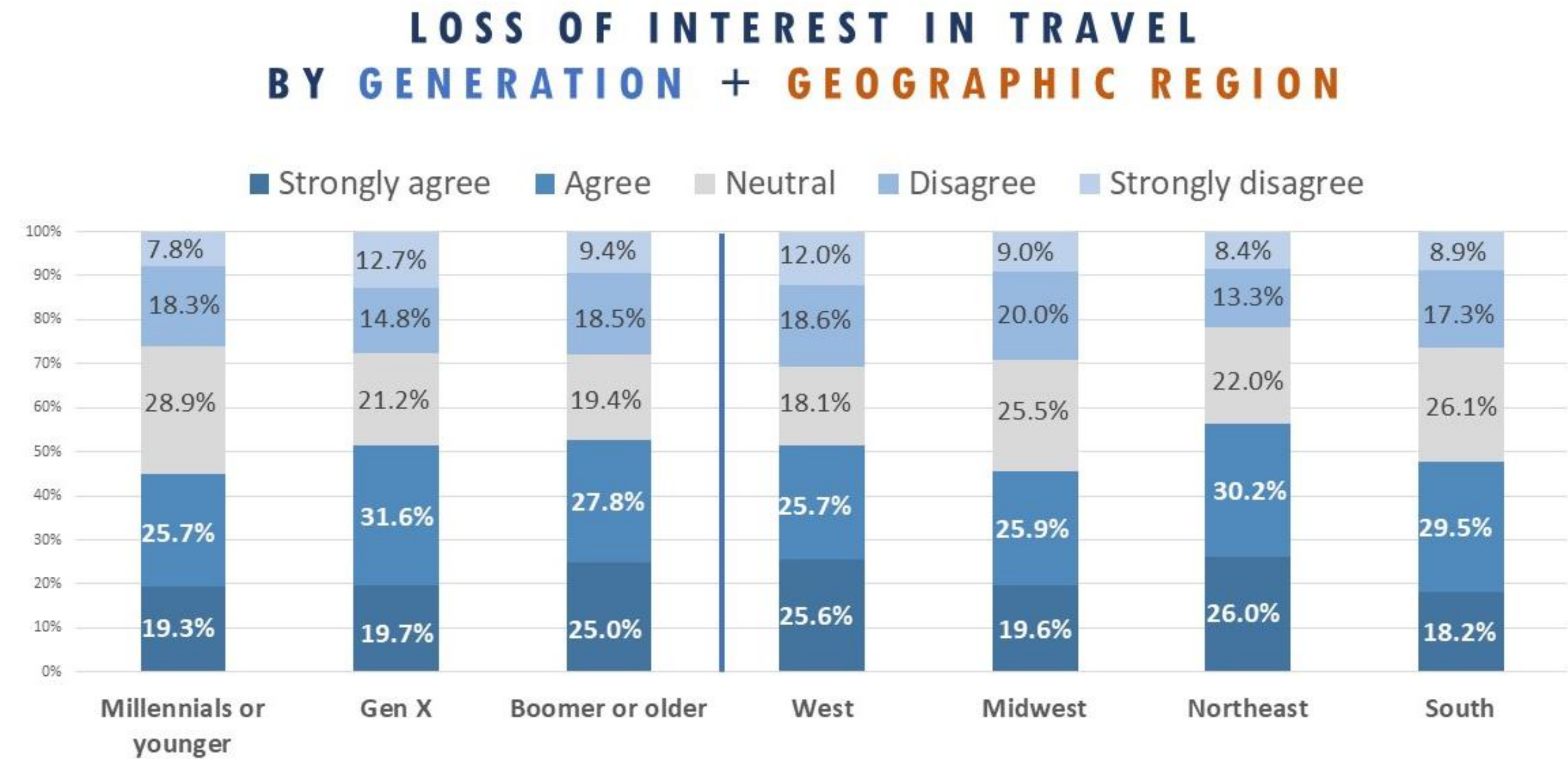


Question: Thinking about the last month, please rate your average level of daily stress from 1 – 10.
Question: How much do you agree with the following statements? If I were to travel now for leisure, I would not be able to fully enjoy it.
Question: How much do you agree with the following statements? 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)

Loss of Interest in Travel

This (hopefully temporary) loss of a taste for traveling is somewhat more pronounced in Baby Boomers and travelers residing in the Western and Northeastern U.S.



Question: How much do you agree with the following statements? 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)



Coronavirus Travel Sentiment Index

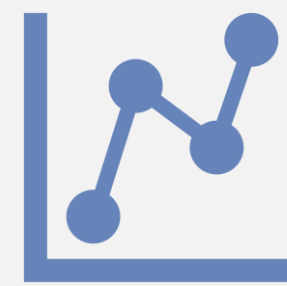
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 27th

What is a Predictive Index?



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



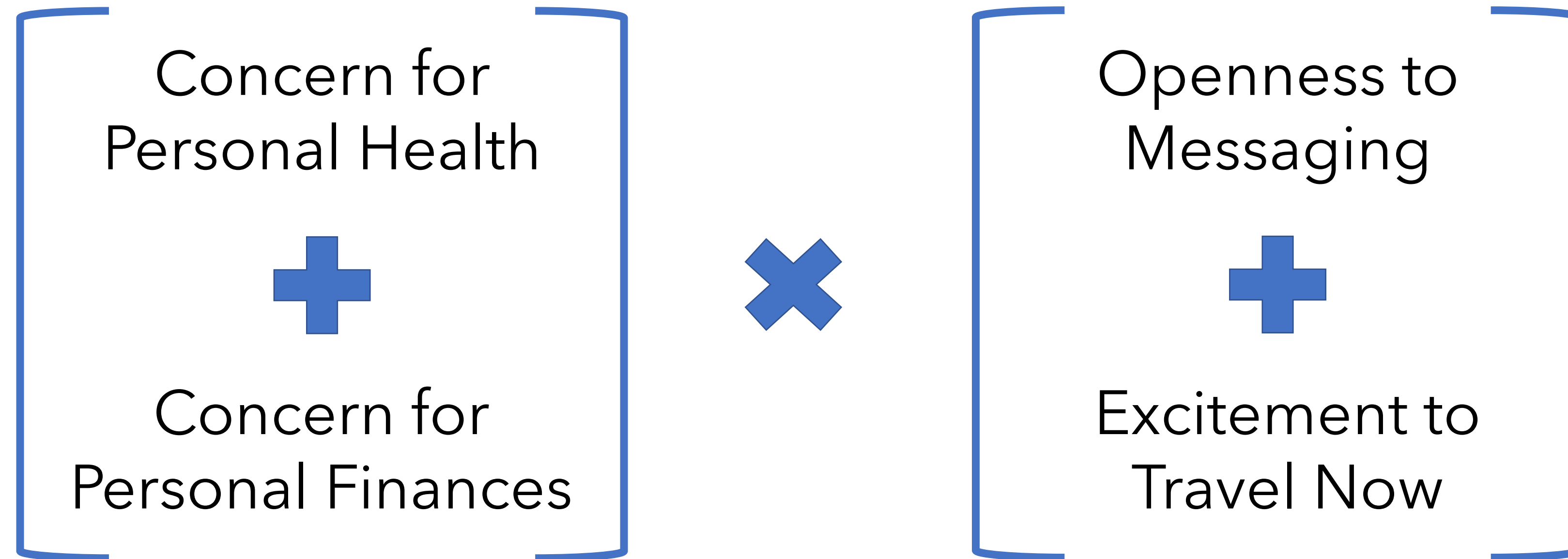
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

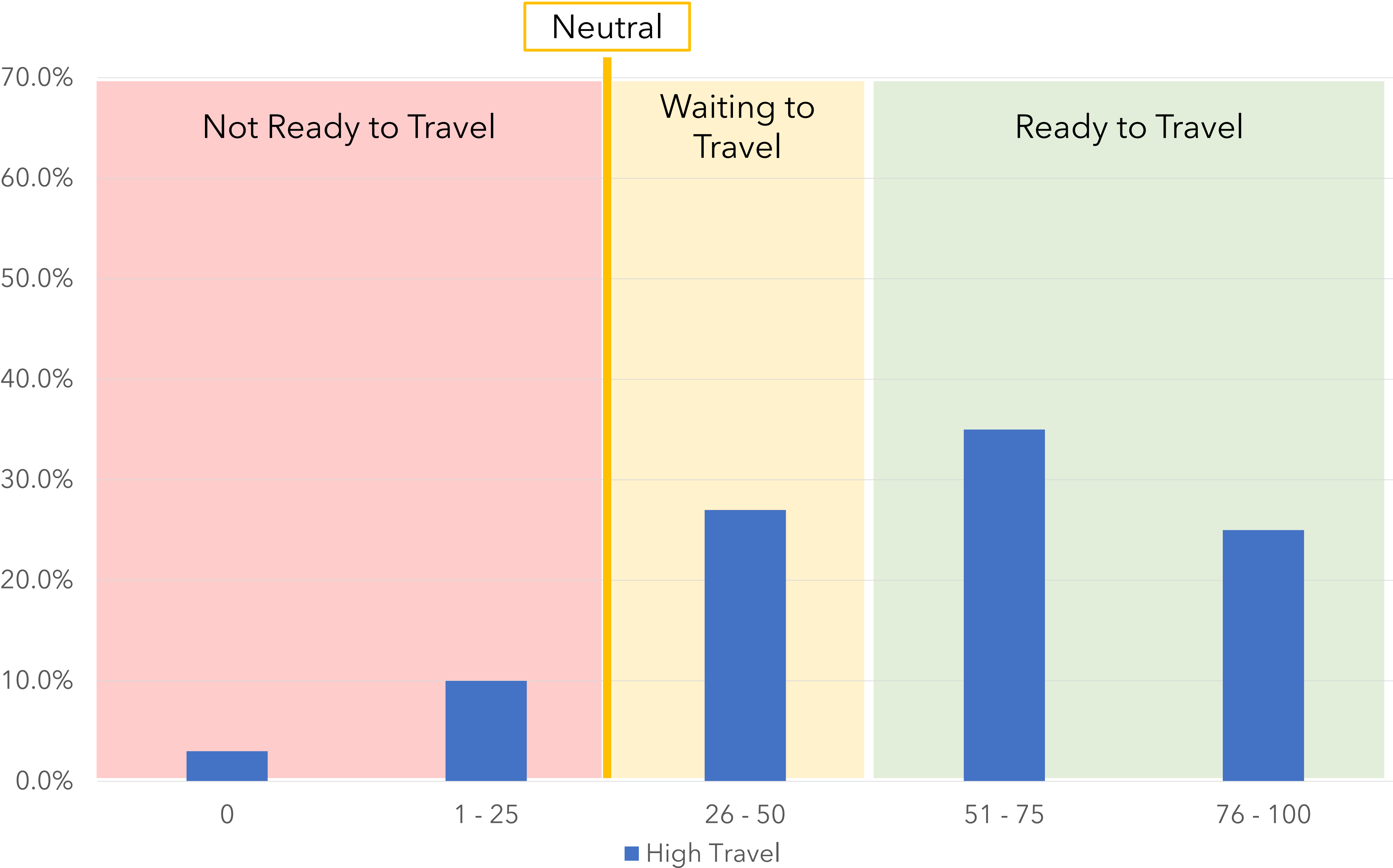
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

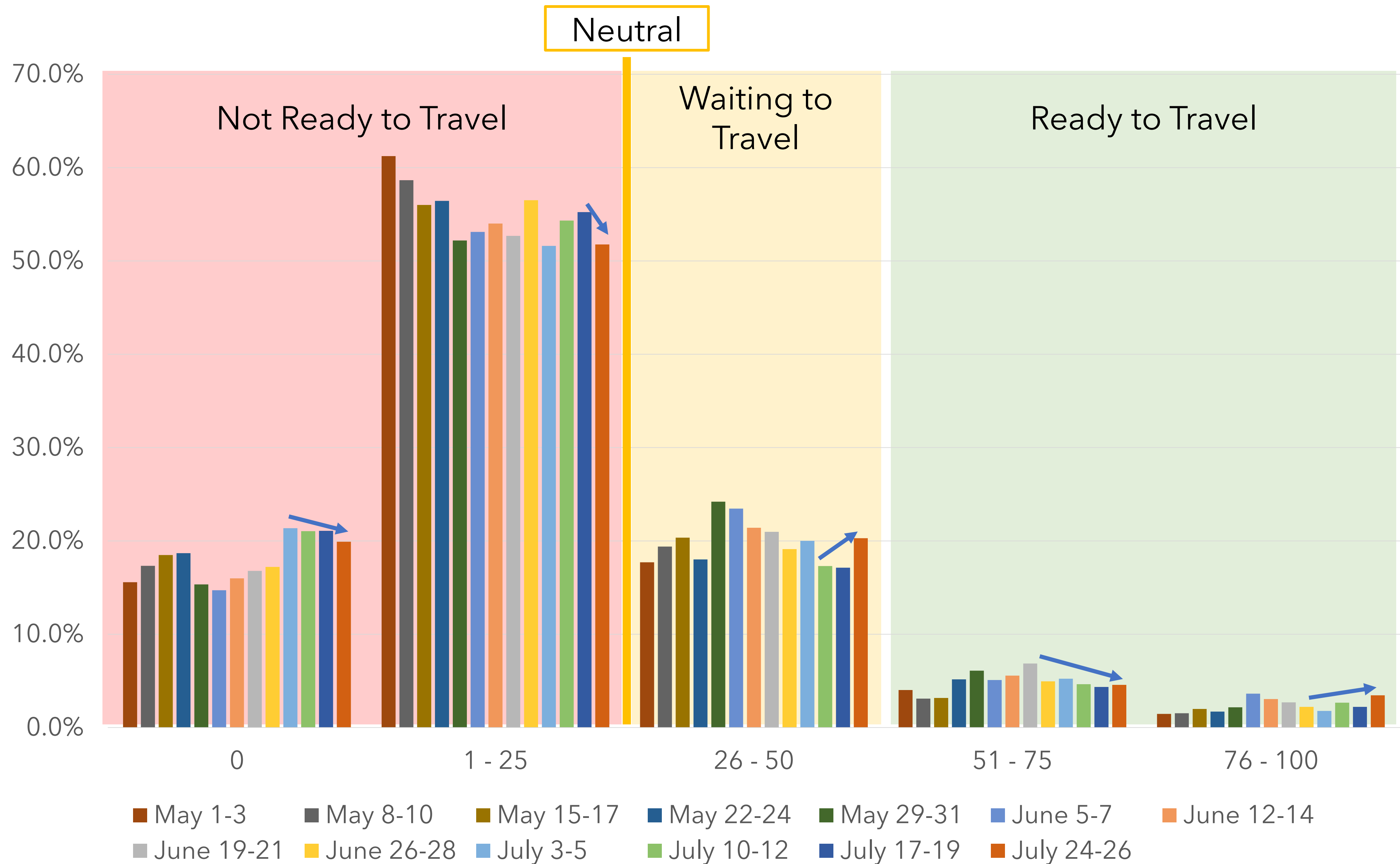


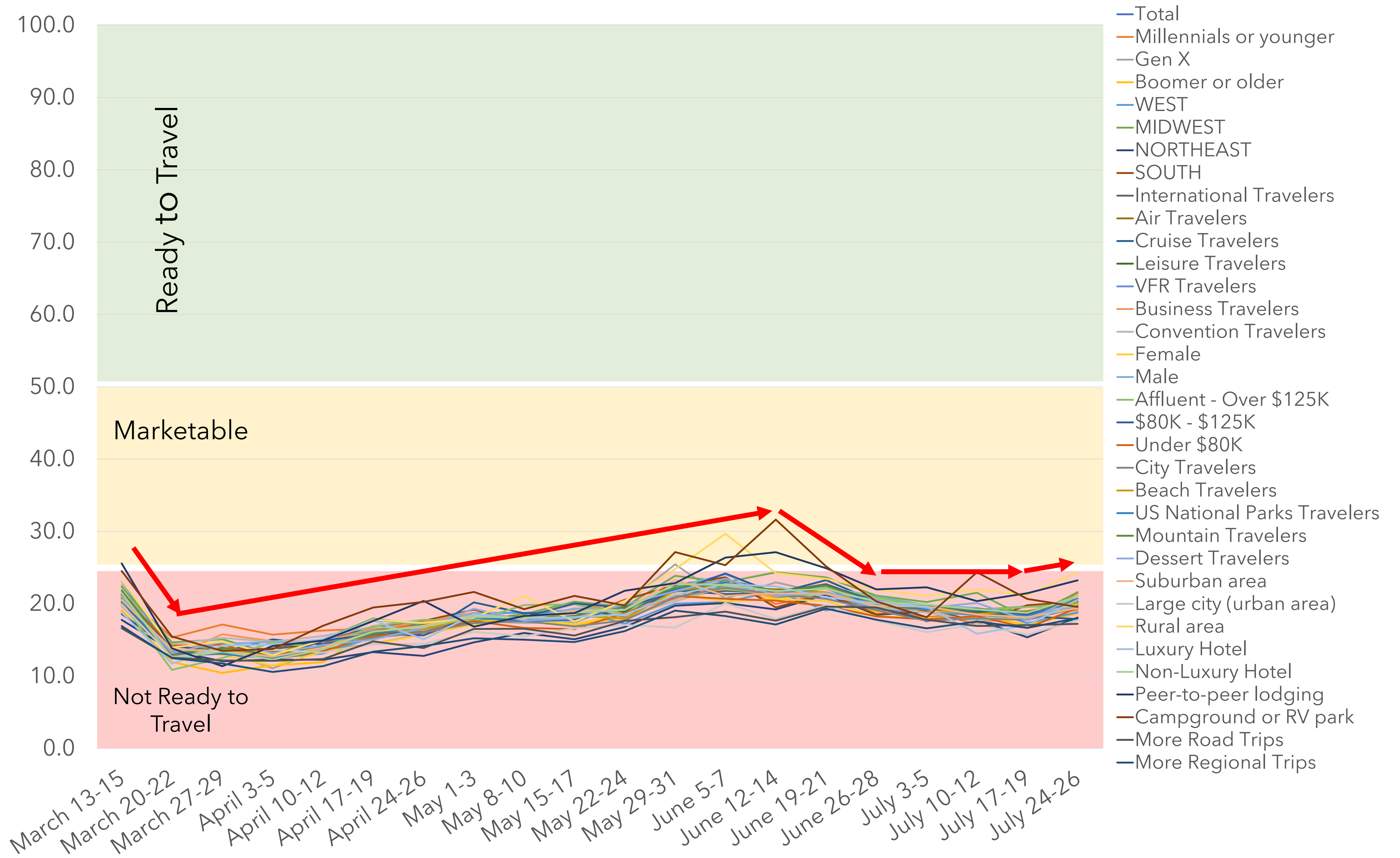
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook

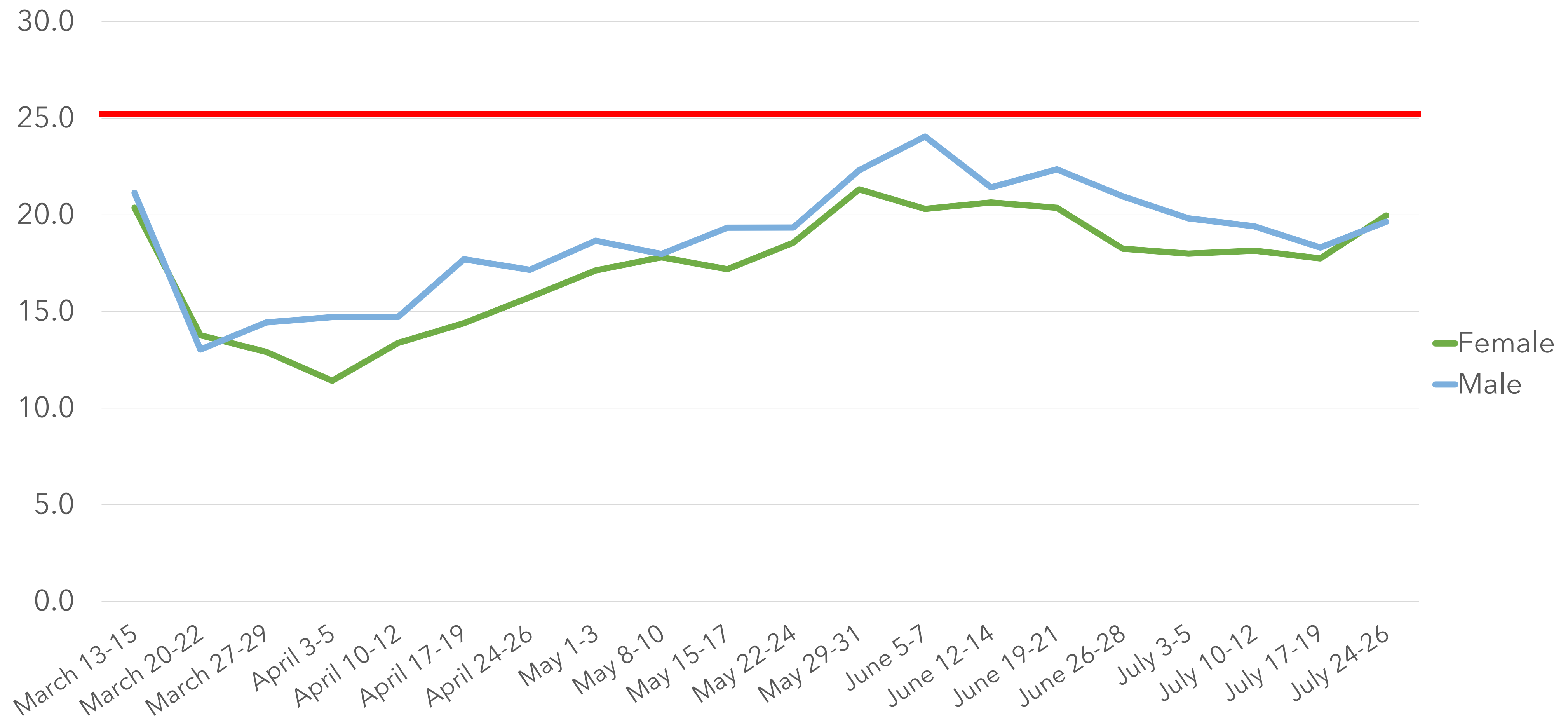




Gender

Points of Interest:

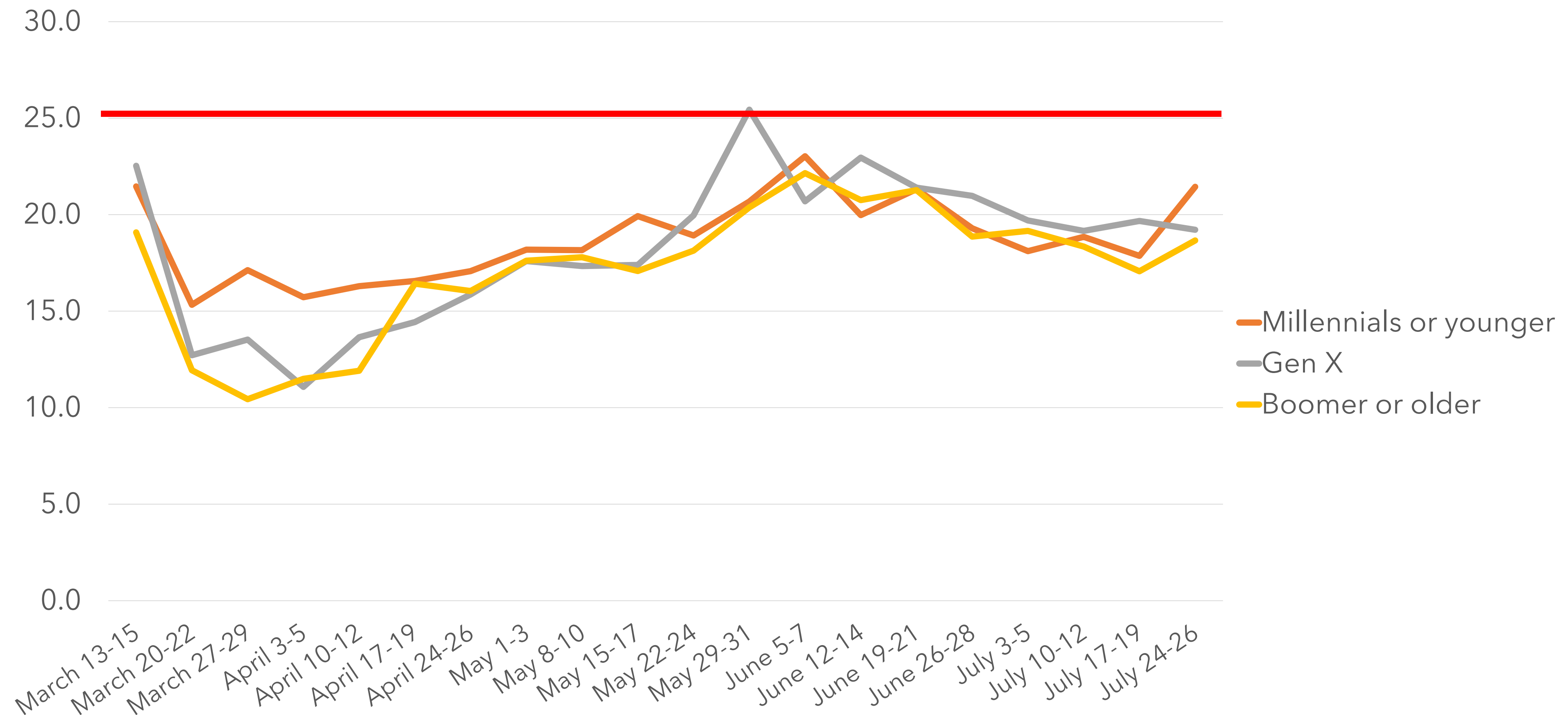
- Both Men and Women show increased sentiment this week.
- However, safety concerns showed little movement for both Men and Women this week.
- This week 47.2 percent of Women reported they have no plans to travel in 2020 (down from 49.3% last week).
- One-in-five Men this week (22.4%) said they are already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



Generation

Points of Interest:

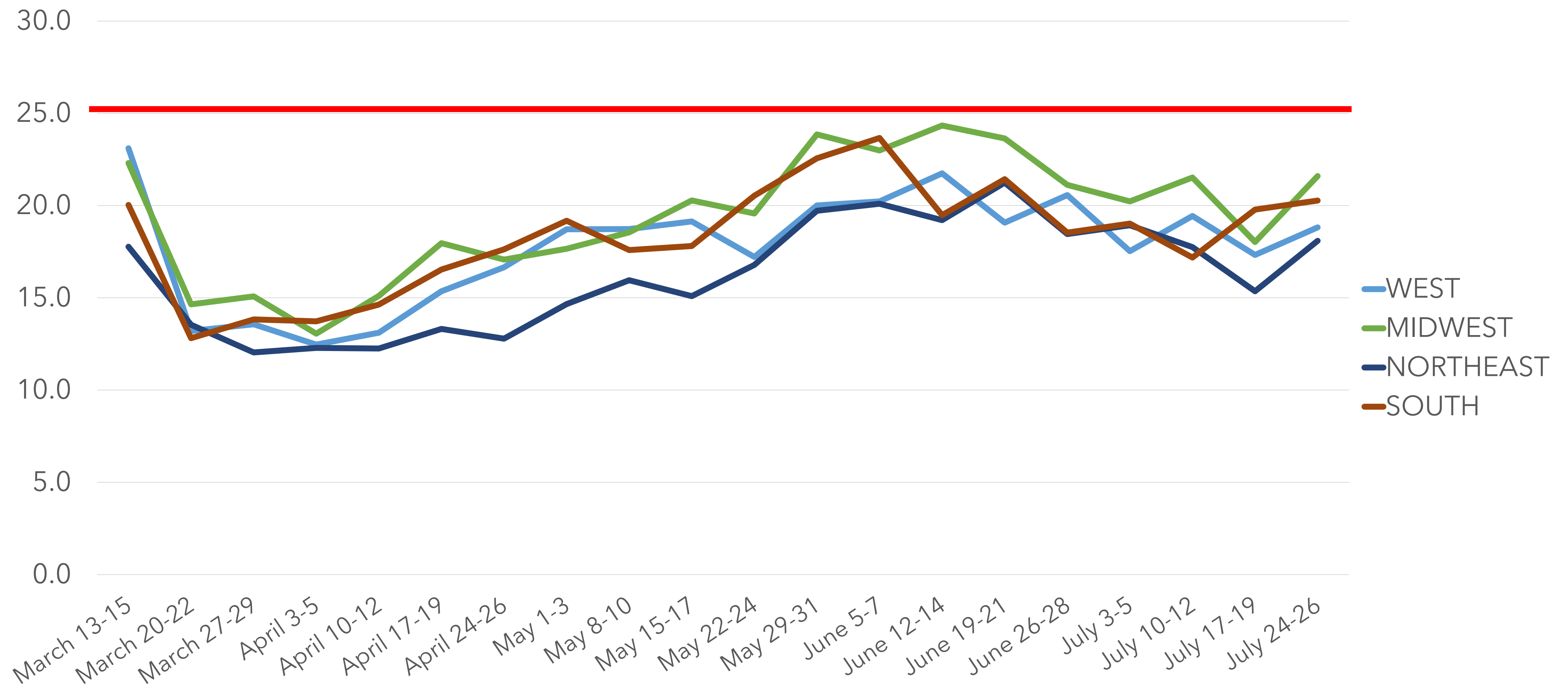
- Millennials indexed higher than the other generations this week, indexing nearly as high as they did in early June.
- Gen X showed a slight increase in safety concerns this week compared to the other generations.
- Over a third of Millennials (35.6%) reported they would be Happy or Very happy to see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



US Region

Points of Interest:

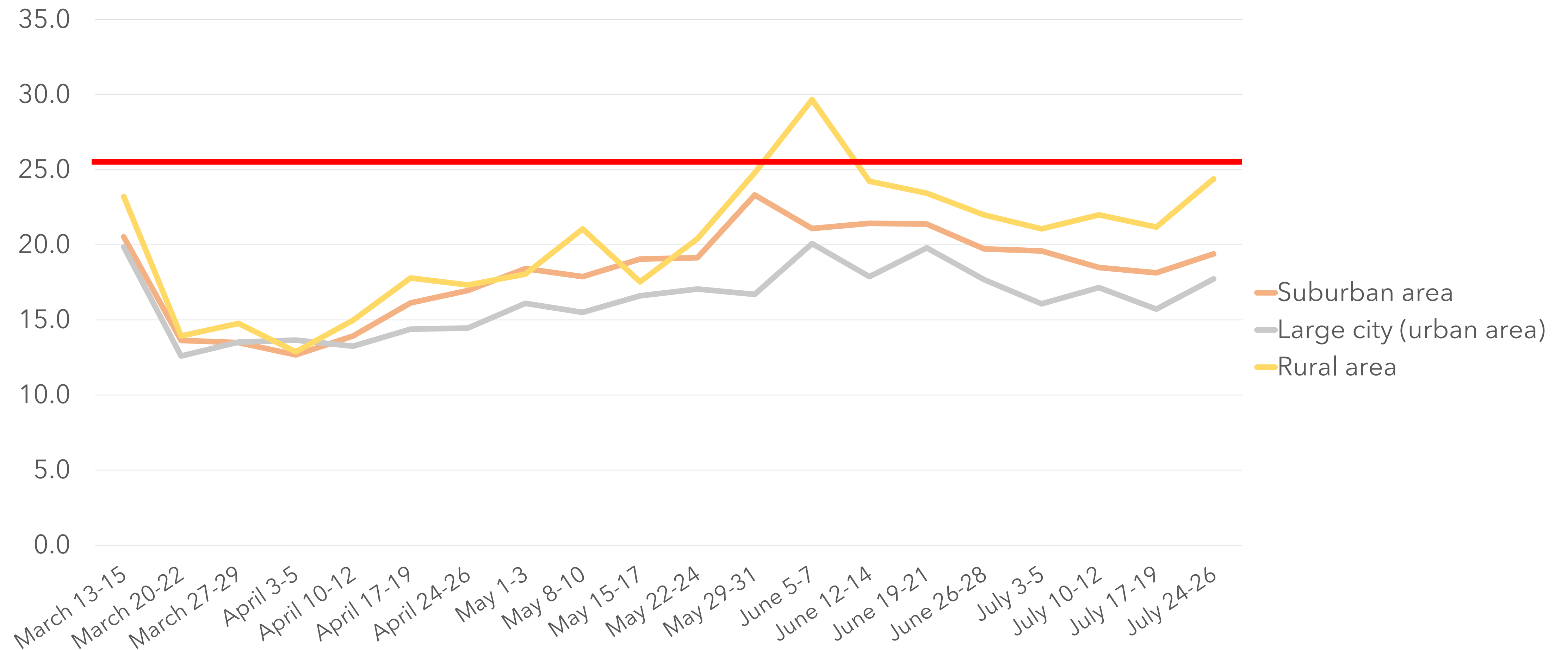
- The Midwest indexed highest amongst US regions this week and all regions are showing at least some sentiment improvement.
- The Midwest and Northeast regions showed slight decreases in safety concerns this week while the other regions showed increases.
- The Midwest and South regions expressed more 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:

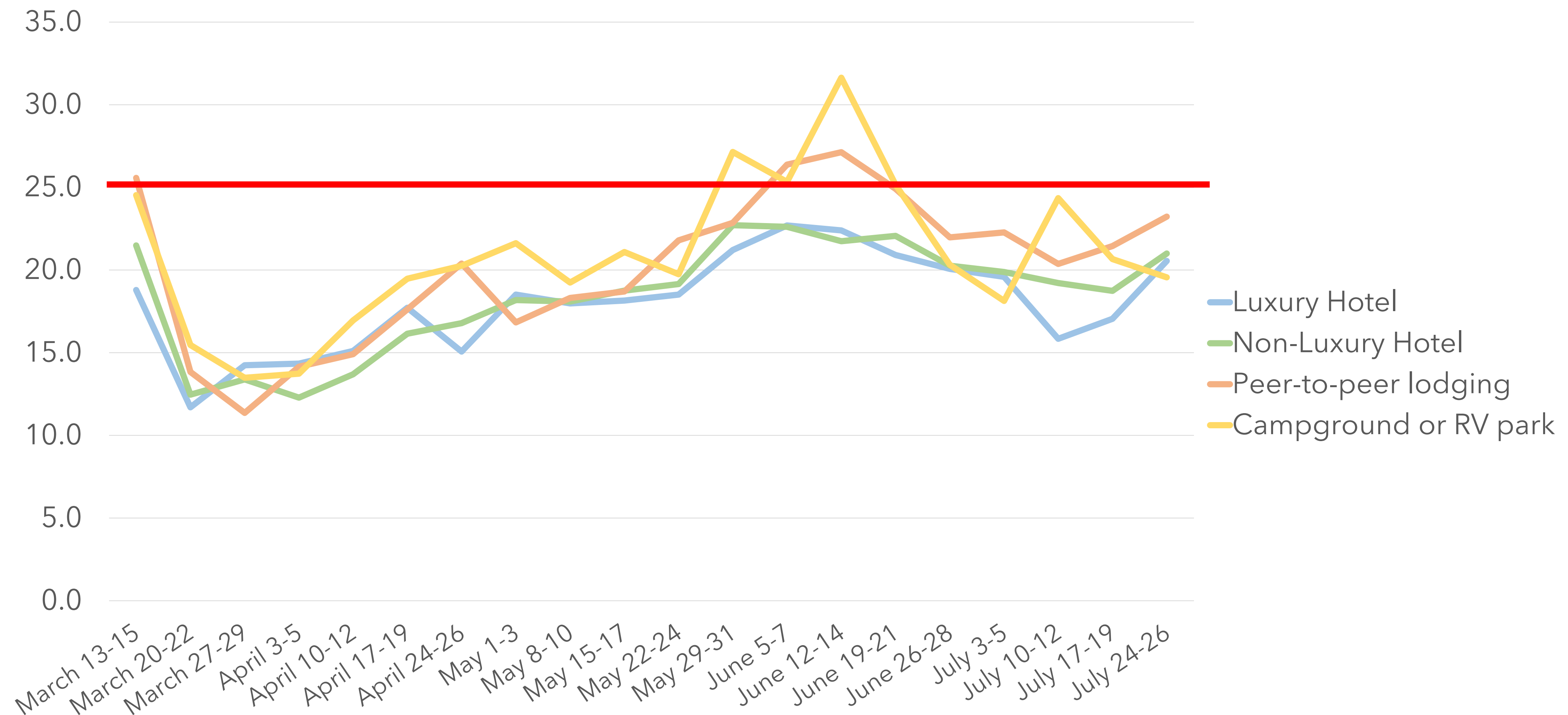
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural respondents reported decreased safety concerns this week.
- Large city Urban respondents were the most likely to say they'd traveled on a commercial airline in the past two months (19.8% compared to less than 10% for Suburban and Rural respondents).



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer respondents indexed highest amongst lodging types this week.
- Luxury hotel respondents reported decreased safety concerns this week.
- Luxury Hotel respondents were the most likely this week to say Luxury or 5-star hotels would be the safest lodging option in the next six months (76.1% compared to around 50% or less for other respondents).





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/>

15-minute presentations for your board and stakeholders

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