

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JULY 5<sup>TH</sup>, 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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**THANK YOU IN ADVANCE**





## Key Findings for the Week of July 5<sup>th</sup>

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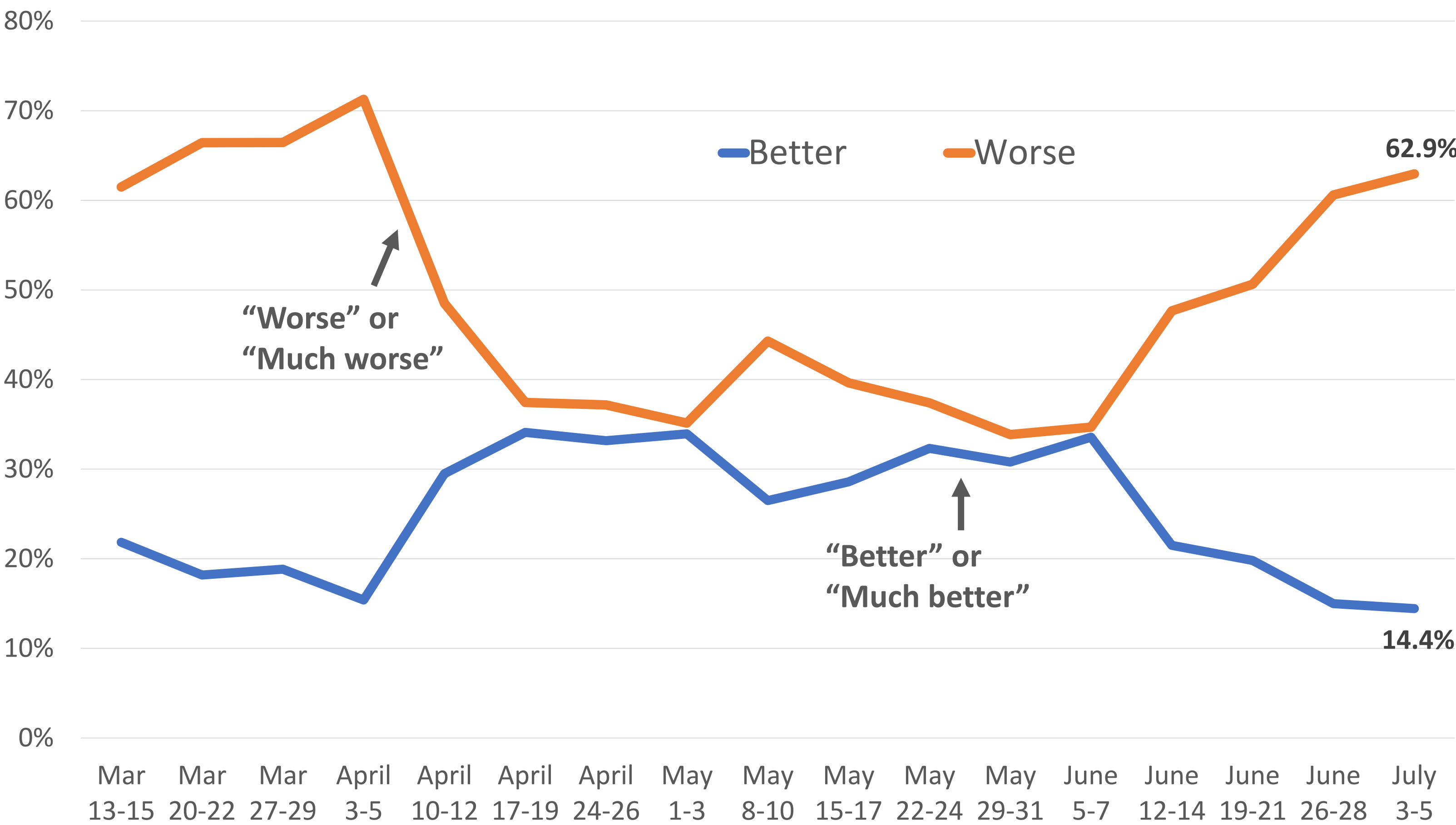


# Expectations for the Coronavirus Outbreak

As record numbers of cases continue to be reported throughout the United States, 63.0% of travelers feel the situation is going to get worse in the next month—up dramatically from 34.7% at the beginning of June.

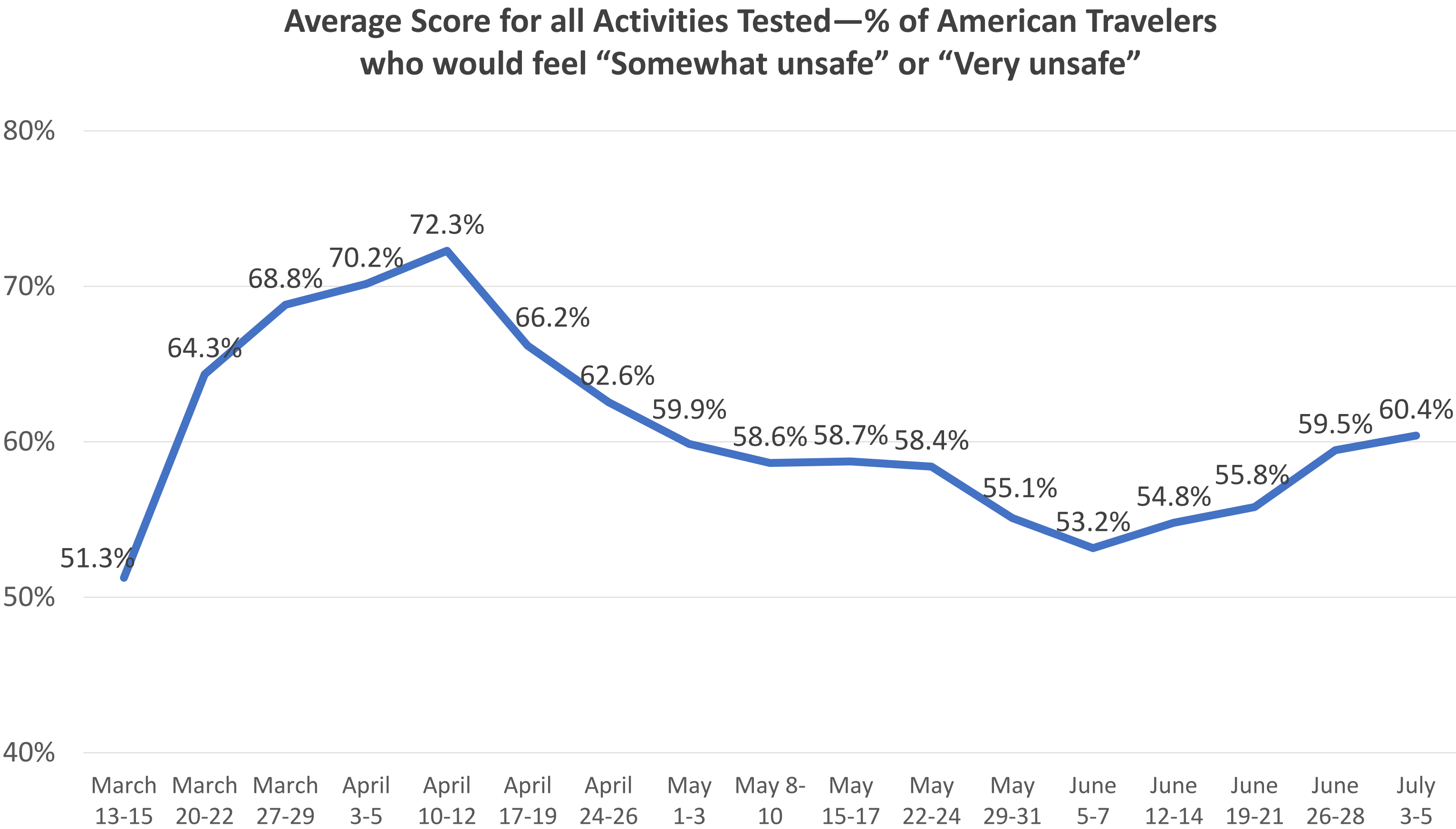
**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)  
In the next month the coronavirus situation will \_\_\_\_\_

*(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 1,364 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 (Waves 1-17 Comparison)

Perceptions of travel activities being unsafe are the highest they have been since the week of April 27th.

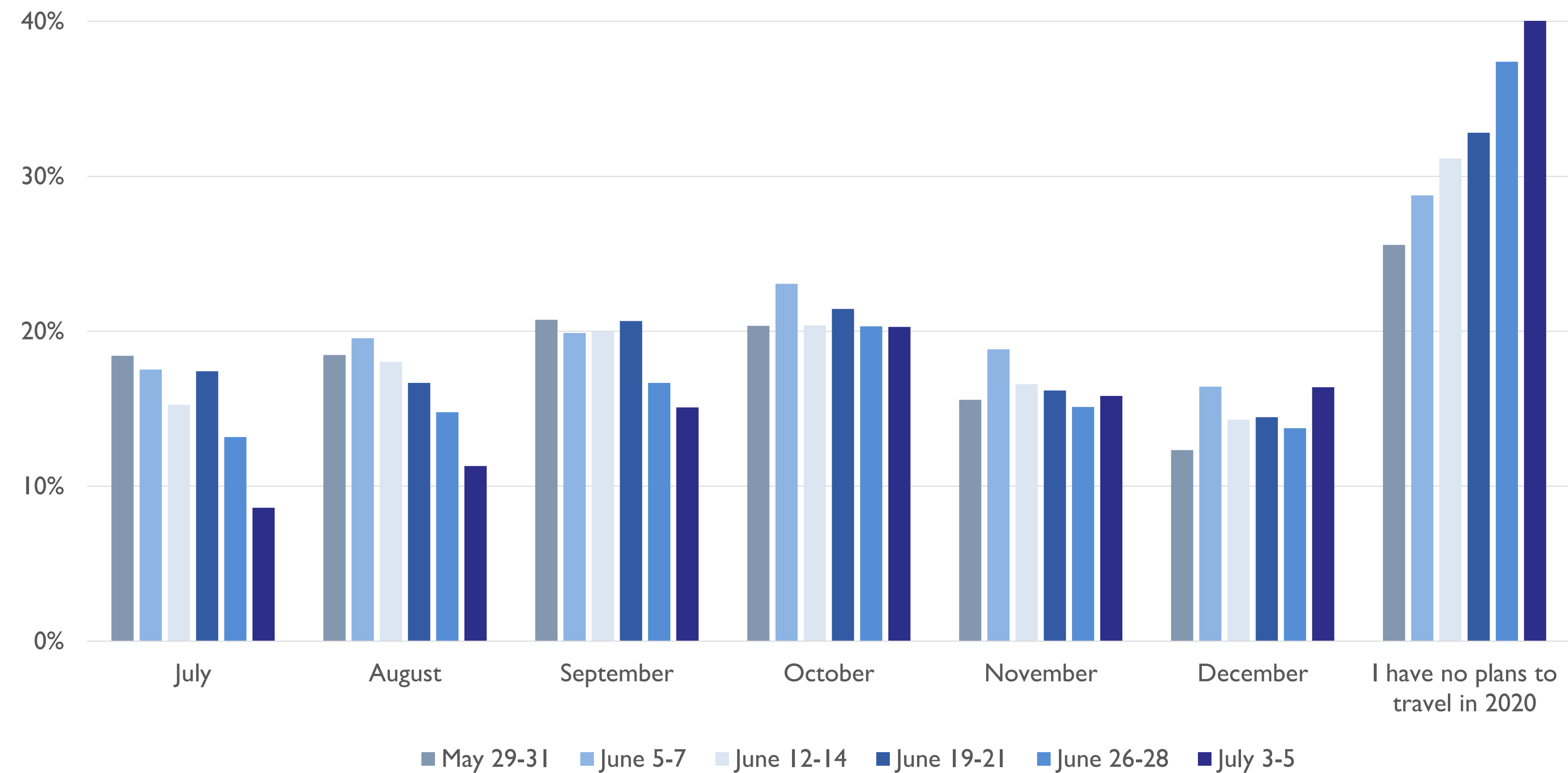


**Question:** At this moment, how safe would you feel doing each type of travel activity?

(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 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)

# Months of Upcoming Travel Plans

Now, 40.6% of American travelers say they don't have a leisure trip planned for the remainder of 2020.



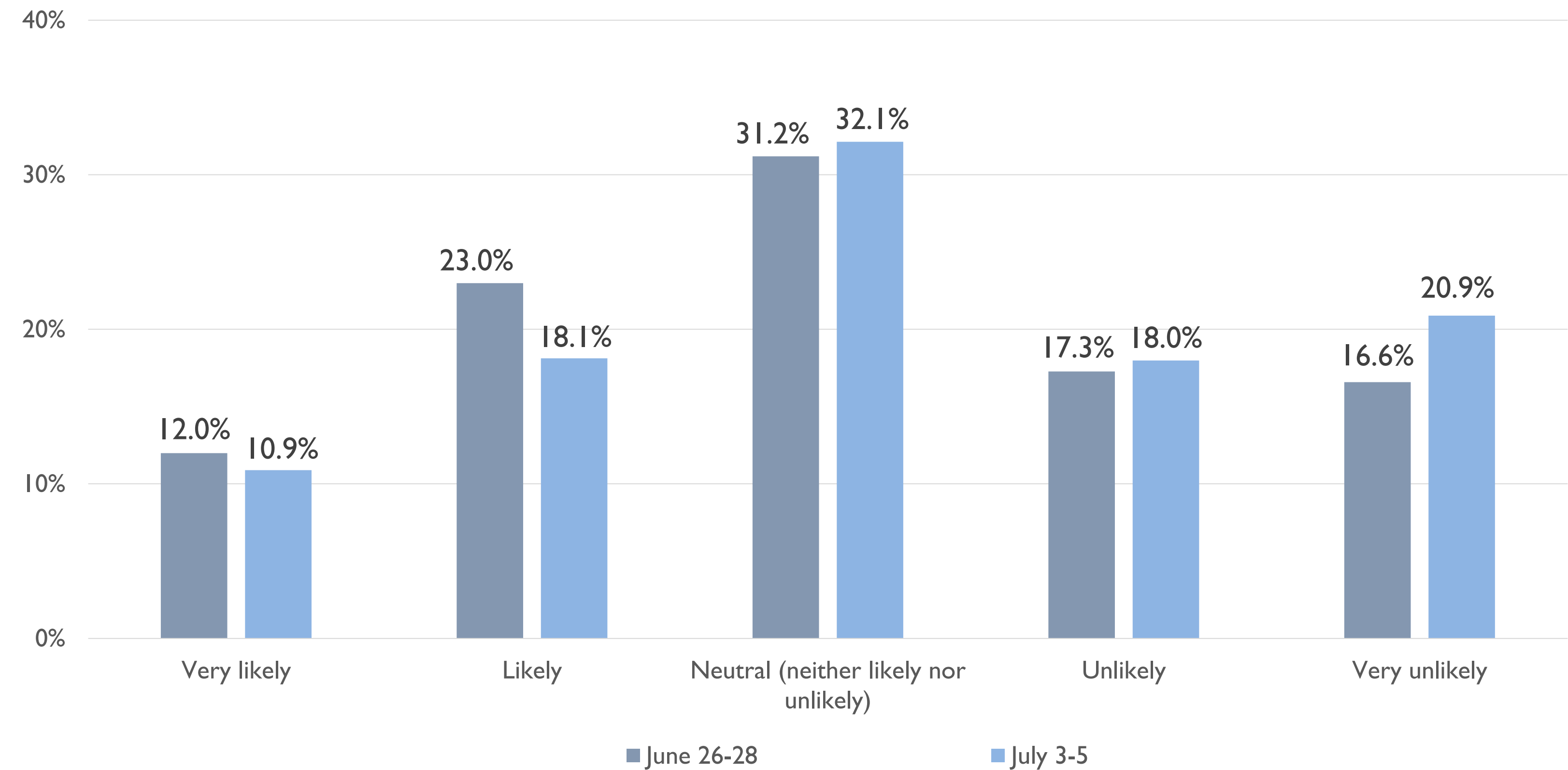
**Question:** Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

(Base: 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected May 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



# Potential for Near-Term Conversion

Americans reported ability to be inspired to travel in the next three months—even under attractive conditions—has also declined with the worsening of the pandemic. While last week 35.0% of American travelers said they would be open to taking a trip they had not previously considered, this has fallen to 29.0% this week.



**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 and 1,364 completed surveys. Data collected June 26-28 and July 3-5, 2020)*

# Reasons for Avoiding Certain Domestic Destinations

There was also a significant increase in the percent of Americans who said there are certain destinations they would normally consider visiting but now will absolutely not due to the coronavirus situation—37.3% up from 29.6% in just one week. When asked what’s driving the avoidance of these destinations, rising coronavirus cases and the perceived unsatisfactory management of the situation, as well as the expected poor behavior of other tourists (more so than the locals) was most cited.

**Question:** You said you would now absolutely not visit at least one specific destination(s) later this year. Please tell us why by selecting each item that contributes to why you feel this way.

*(Base: Respondents who would absolutely not visit a specific destination, 191 completed surveys. Data collected July 3-5, 2020)*



CORONAVIRUS CASES  
ARE CURRENTLY ON  
THE RISE THERE  
( 4 6 . 9 % )



THE DESTINATION(S)  
IS NOT MANAGING  
THE COVID-19  
PROBLEM WELL  
( 3 8 . 8 % )



OTHER VISITORS  
MAY NOT PRACTICE  
SOCIAL DISTANCING  
( 2 9 . 8 % )



TOO MUCH MEDIA  
COVERAGE OF  
COVID-19 PROBLEMS  
IN THE DESTINATION  
( 2 8 . 7 % )



OTHER VISITORS MAY  
NOT WEAR MASKS  
( 2 7 . 4 % )



THE ATTRACTIONS I  
WANT TO VISIT  
WOULD BE CROWDED  
( 2 3 . 1 % )



TOO MANY LOCAL  
RESIDENTS DON'T  
WEAR MASKS  
( 2 3 . 1 % )



TOO MANY LOCAL  
RESIDENTS DON'T  
PRACTICE SOCIAL  
DISTANCING  
( 2 3 . 1 % )



OTHER  
DESTINATIONS  
FEEL SAFER  
( 1 8 . 1 % )

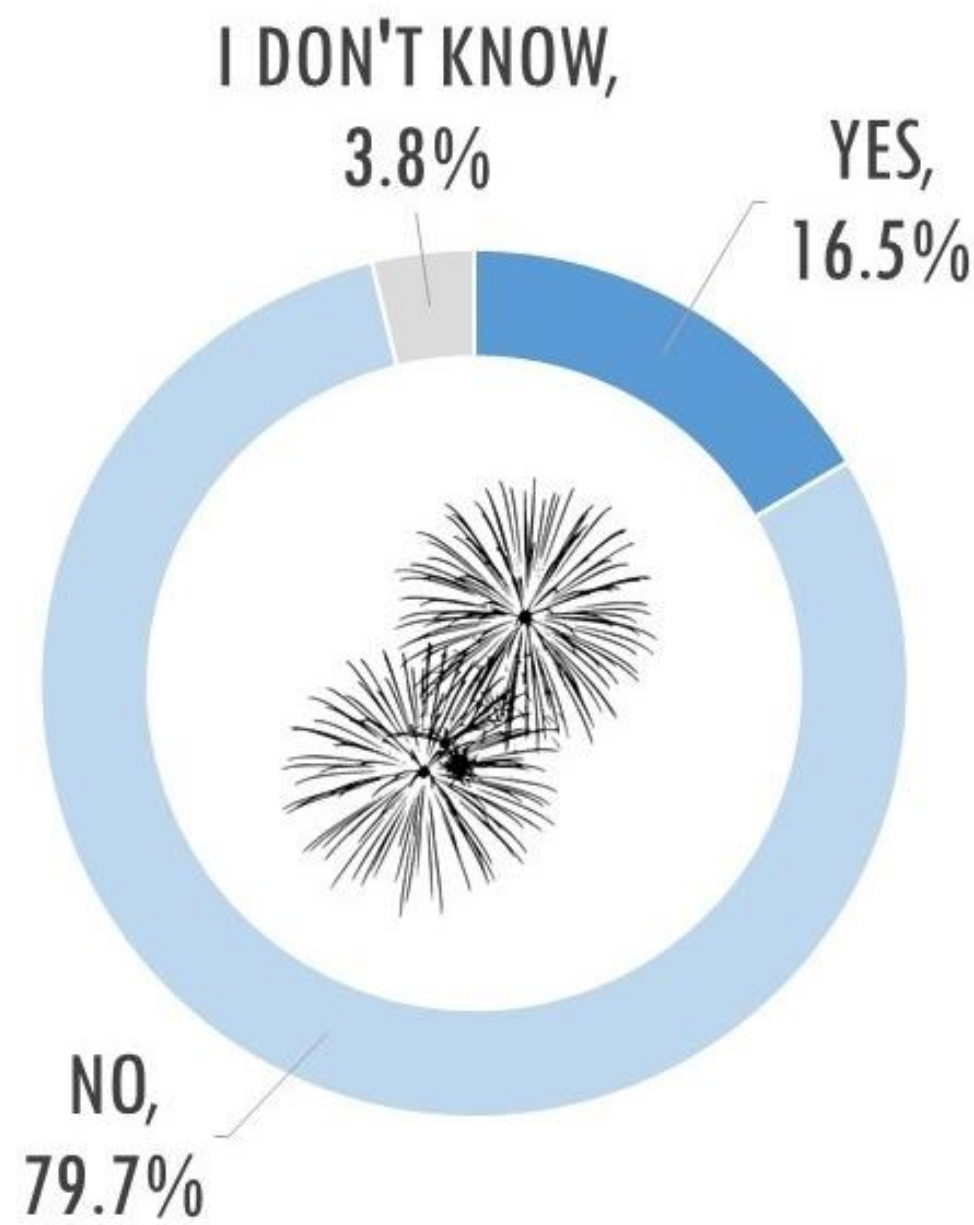


# Holiday Travel During Covid-19: Memorial Day vs. Fourth of July

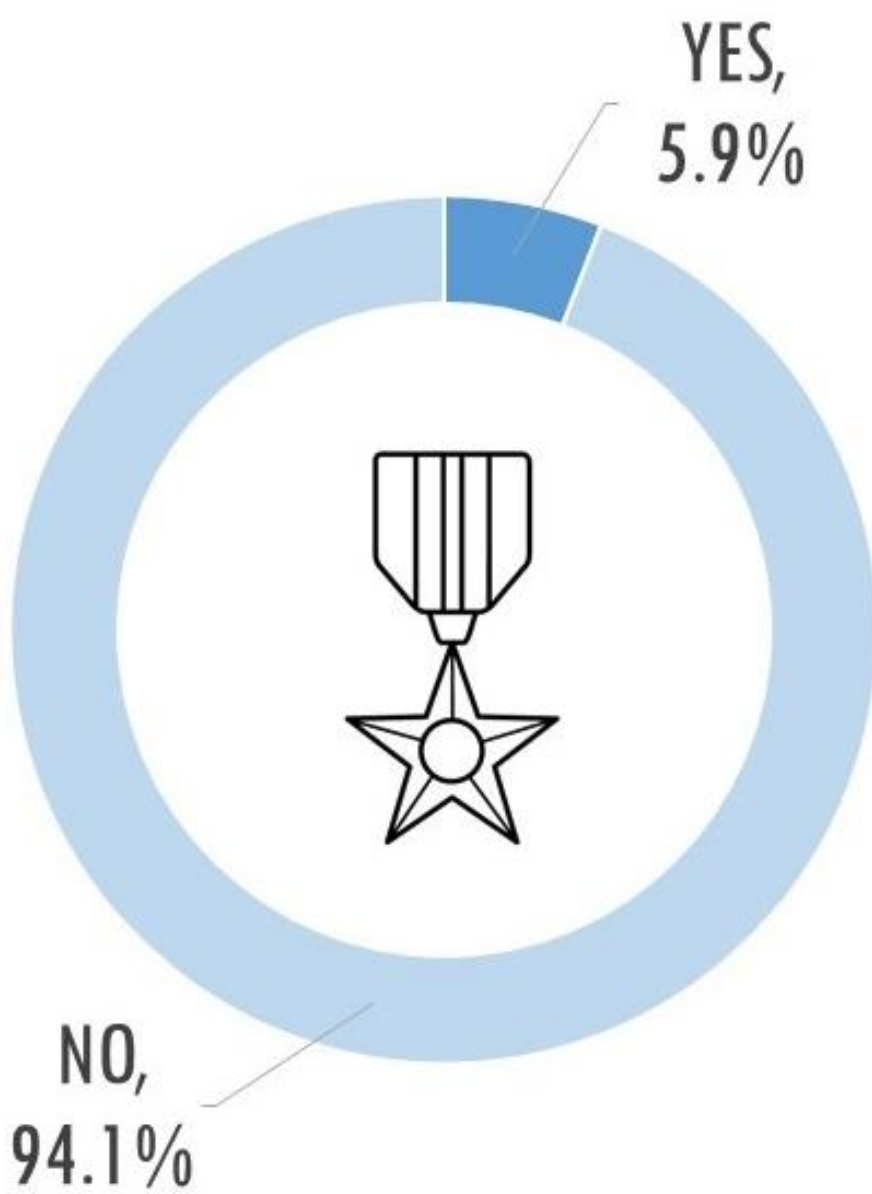
Nevertheless, there are many Americans who are still traveling or planning to. In fact, 16.5% took a trip for the Fourth of July holiday, more than double the percentage who traveled for Memorial Day (5.9%).

*(Base: All respondents, 1,223 and 1,363 completed surveys. Data collected May 22-24 and July 3-5, 2020)*

**Question:** Are you (or will you be) traveling during the Fourth of July holiday weekend?



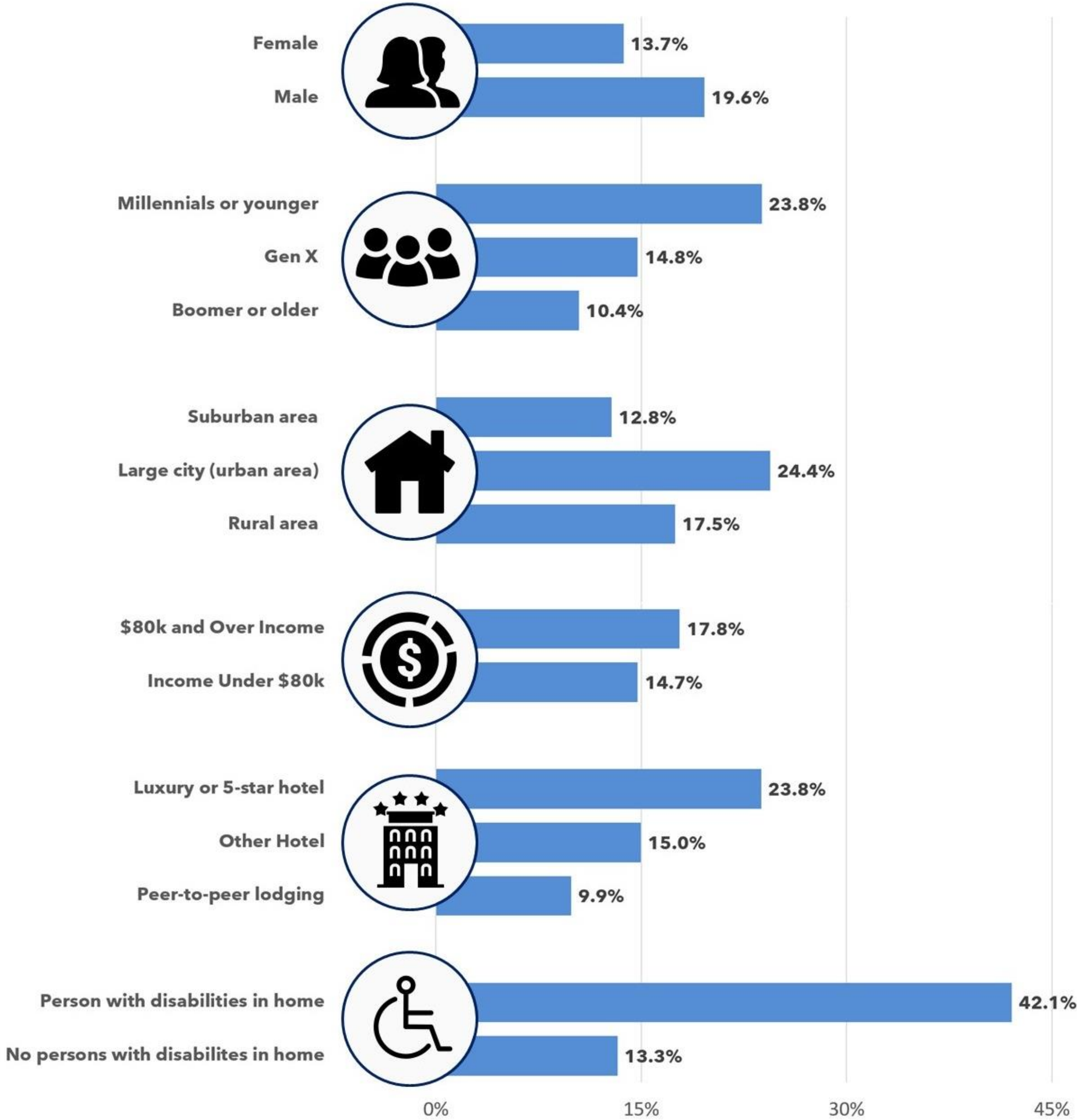
**Question:** Are you taking a trip during the Memorial Day weekend?



# Who Traveled for the Fourth of July Holiday

The profile of these travelers—**younger, male, urban, affluent**—may offer clues to travel’s near-term, as they have been tracking as more ready, open and marketable for travel. A notable percent of those who have, or live with people who have, a disability also traveled this Fourth of July holiday, perhaps underscoring travel’s status as a wellness activity.

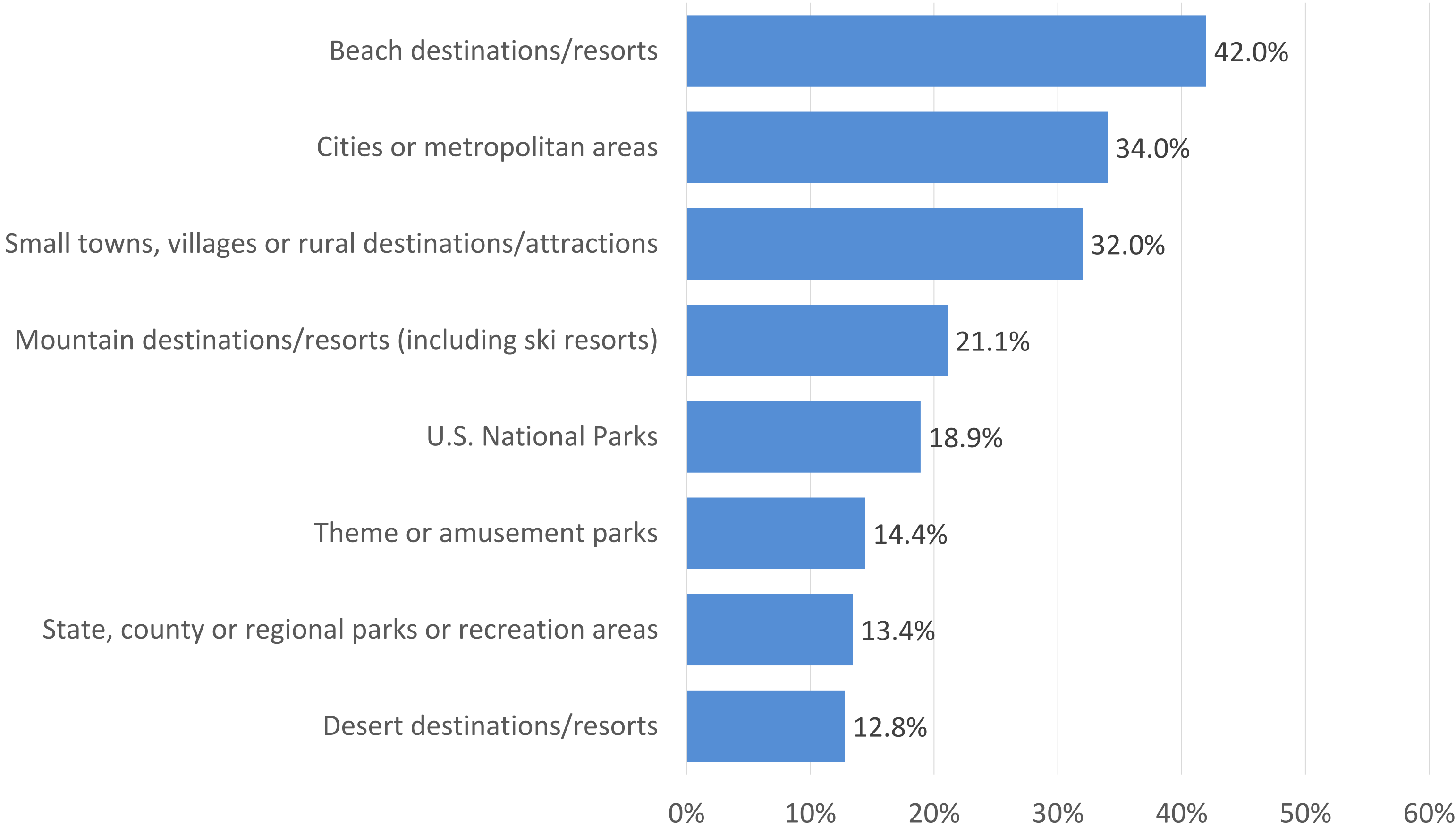
*(Base: Respondents who traveled for the Fourth of July holiday, 225 completed surveys. Data collected July 3-5, 2020)*





# Specific Destination Types Considered in 2020

Americans who already have a destination(s) in mind for their 2020 leisure travel plans continue to show an affinity for beaches (42.0%). Over a third of these travelers say they will visit a city this year and similarly, 32.0% say they will visit a small town or rural area.



**Question:** Thinking about where you are currently considering visiting, which types of destinations are you considering?  
(Select all that apply)

*(Base: Wave 17 data. Respondents who are considering visiting specific leisure destinations in 2020, 294 completed surveys.  
Data collected July 3-5, 2020)*



# Desired Hotel Practices

As hotels continue to be the most popular lodging types, when American travelers were asked about the operational practices that would make them feel most confident that the hotel is looking out for their health, hotel employees wearing masks and gloves topped the list. They also want the cleaning procedures clearly communicated, socially distancing enforced, and to be provided with hand sanitizer and masks.

**Question:** When staying in a hotel in the future, which operational practices would MAKE YOU FEEL MOST CONFIDENT that the hotel is looking out for your health? Please select the practices that would be most important to you. (Select as many as 3)

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



REQUIRE EMPLOYEES WEAR MASKS & GLOVES  
( 38.7 % )



CLEANING / SANITIZING PROCEDURES WELL-EXPLAINED  
( 29.7 % )



GUESTS PROVIDED WITH HAND SANITIZER, FACE MASKS, DISINFECTANT WIPES, ETC.  
( 28.5 % )



SOCIAL DISTANCING GUIDELINES ENFORCED  
( 28.1 % )



REQUIRED EMPLOYEE HEALTH SCREENING  
( 25.4 % )



CLEANING ACTIVITY VISIBLE IN PUBLIC AREAS DURING YOUR HOTEL STAY  
( 24.0 % )

BREAKFAST BUFFETS REPLACED BY ROOM SERVICE OR GRAB-N-GO OPTIONS  
( 16.2 % )

CONTACT-LESS CHECK-IN (APP BASED, NO HUMAN CONTACT)  
( 14.1 % )

SNEEZE GUARD BARRIERS AT FRONT DESK, GIFT SHOP, ETC.  
( 14.0 % )

SMARTPHONE-BASED MOBILE ROOM KEYS  
( 10.2 % )

FLOOR MARKINGS FOR SOCIAL DISTANCING  
( 8.1 % )

AUTOMATED RESTAURANTS  
( 4.3 % )





# Coronavirus Travel Sentiment Index

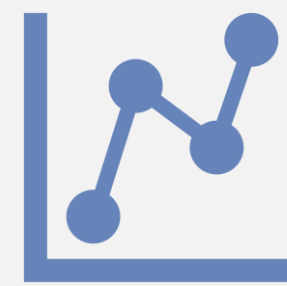
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 5<sup>th</sup>

# 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.

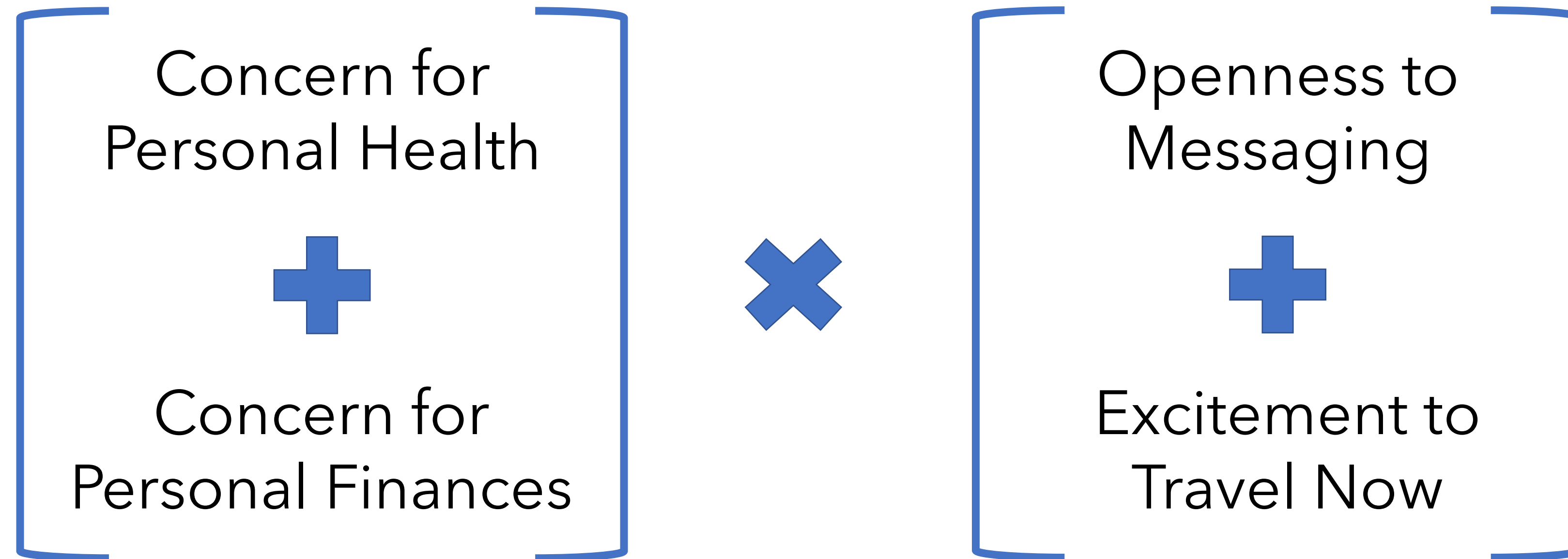


The goals are to identify:

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

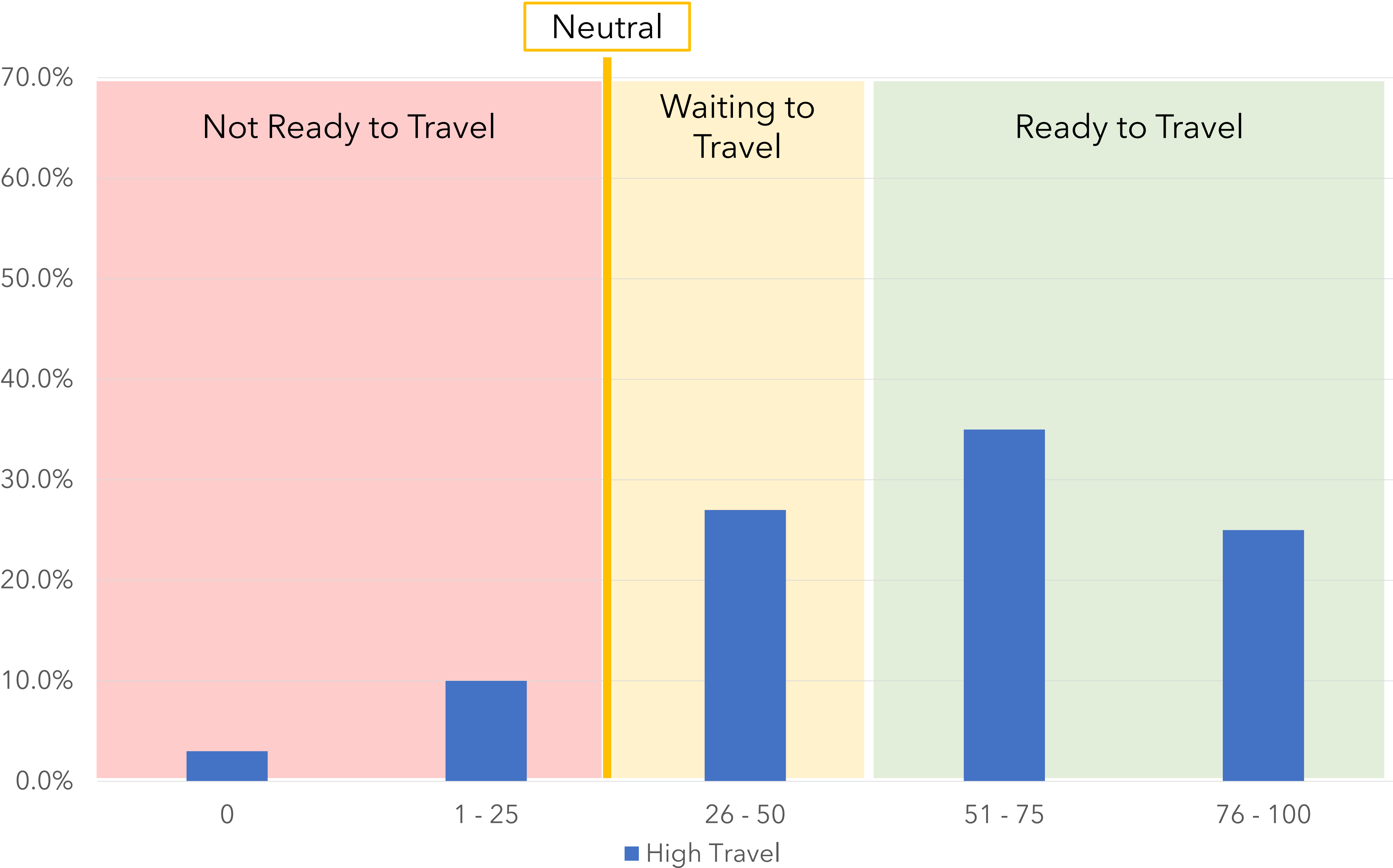


# Predictive Index Formula



\*Normalized to a 100pt scale

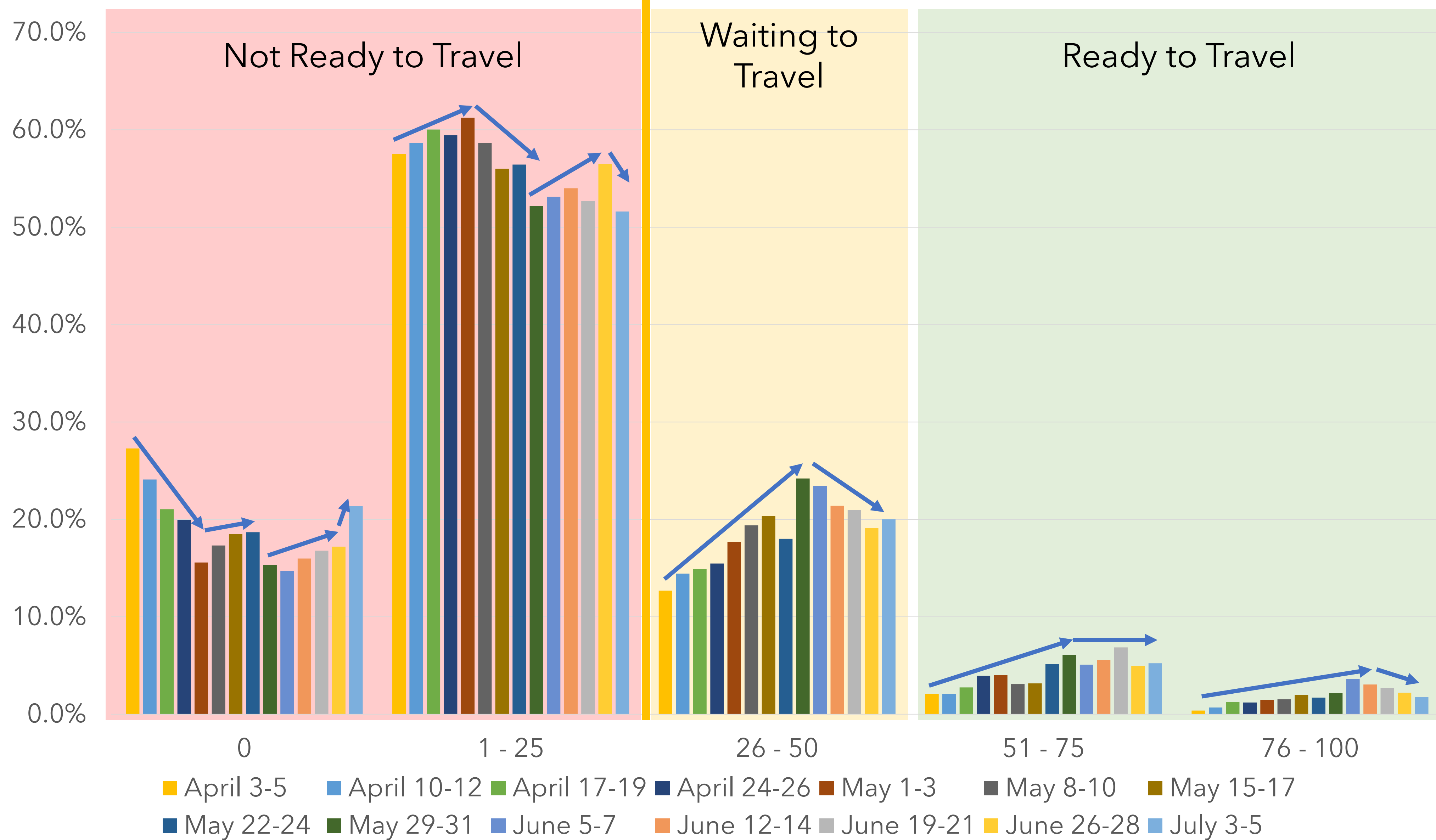
# Healthy Travel Outlook

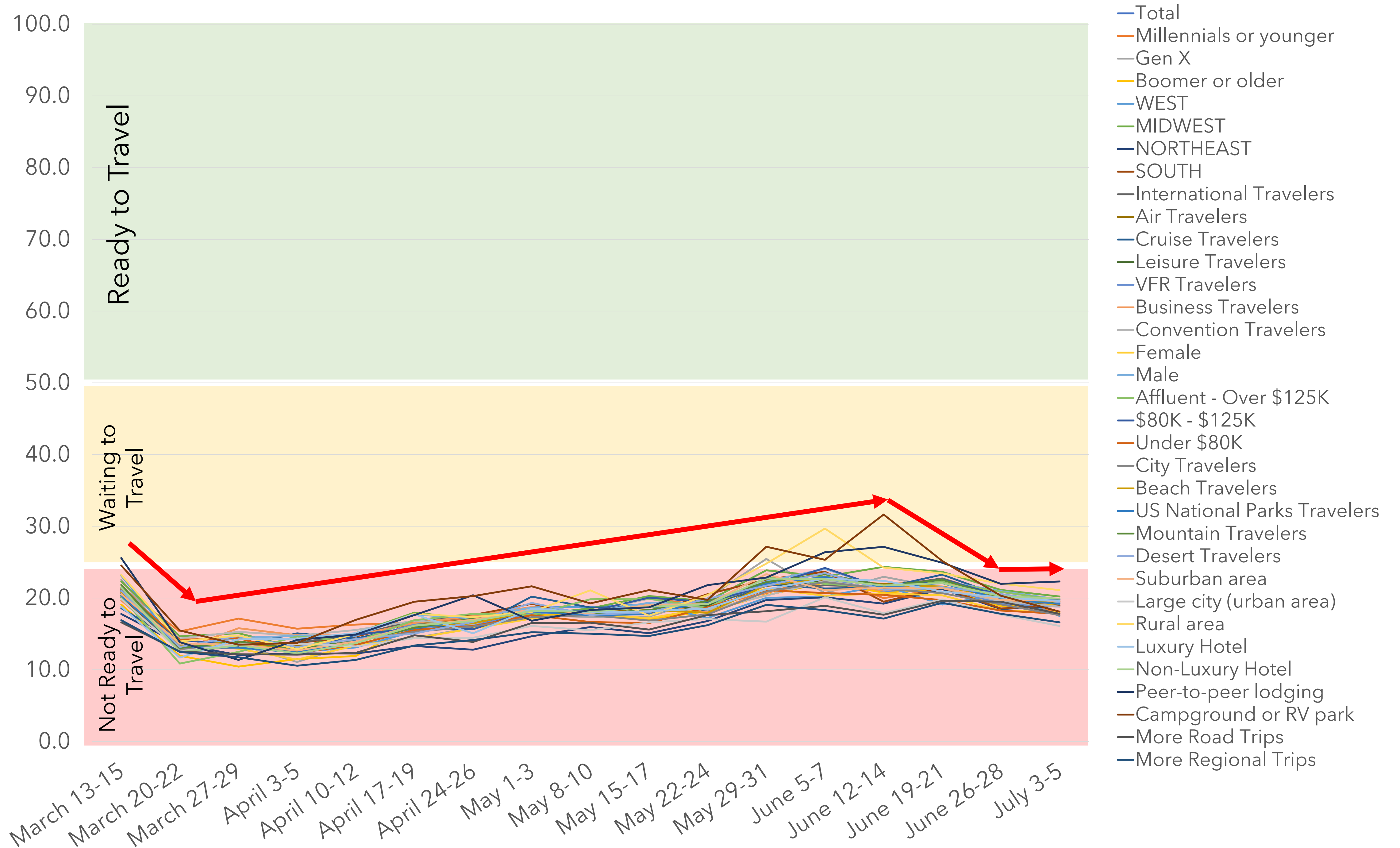




# Travel Outlook

Neutral



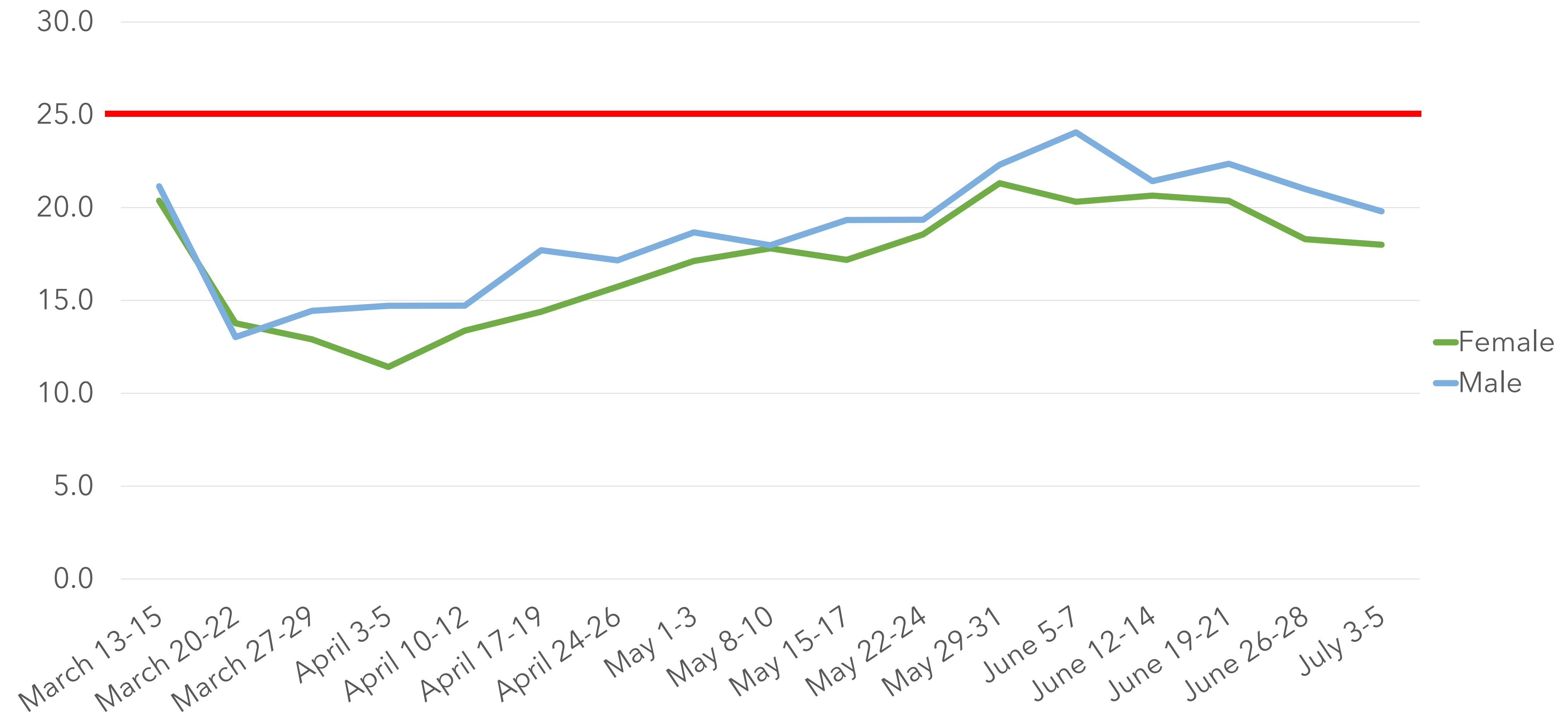




# Gender

## Points of Interest:

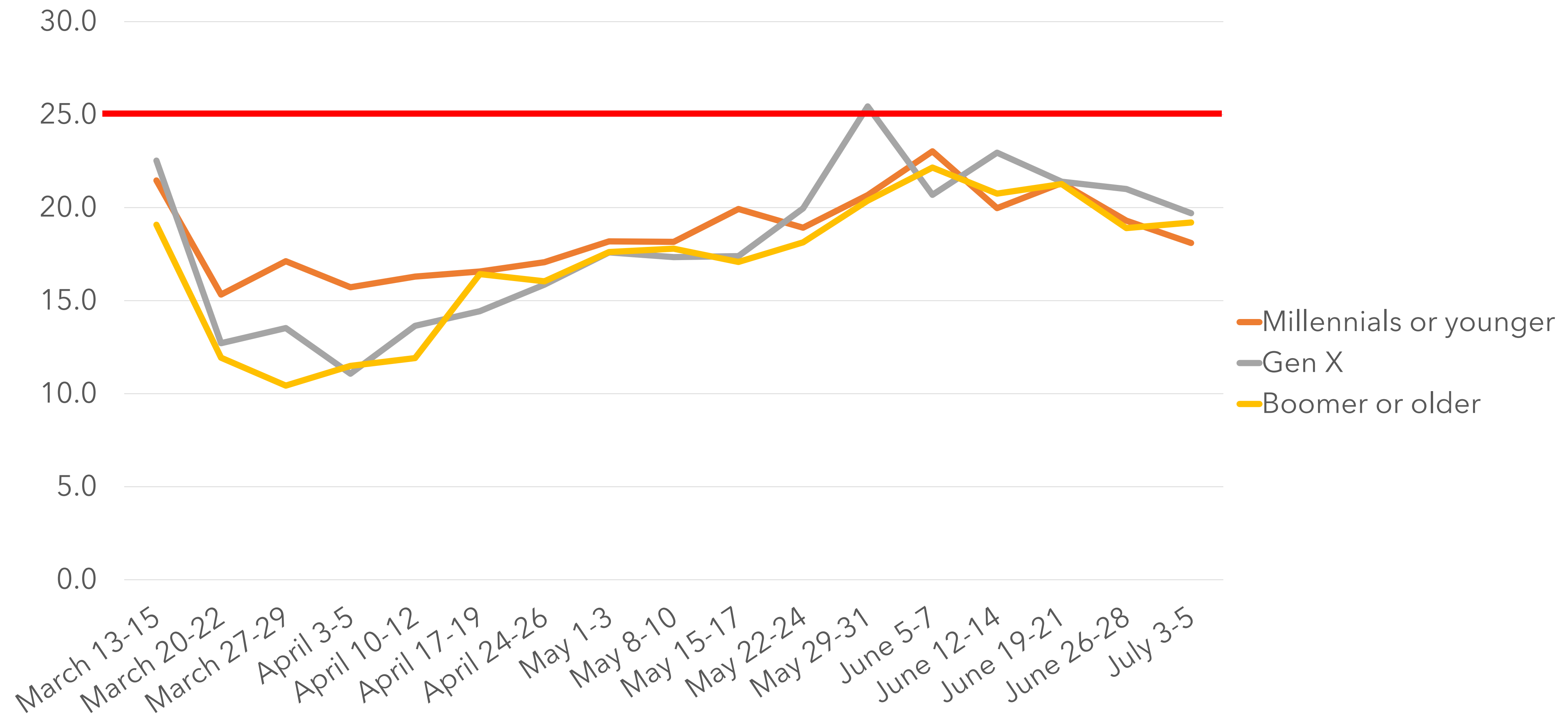
- Safety concerns increased for Men more so than for Women this week.
- This week, 41.2 percent of Women reported they have no plans to travel in 2020 (down slightly from 42.3% last week).
- About a quarter of Men this week (23.4%) said they are already traveling or ready to travel with no hesitations (compared to 17.8% of Women).



# Generation

## Points of Interest:

- Millennials indexed lower than the other generations this week, which has happened only once prior to three weeks ago.
- Millennials and Gen X showed slight increases in safety concerns this week.
- About a quarter of Millennials reported having plans to travel during the Fourth of July holiday weekend, while only one-in-ten Boomers said the same.

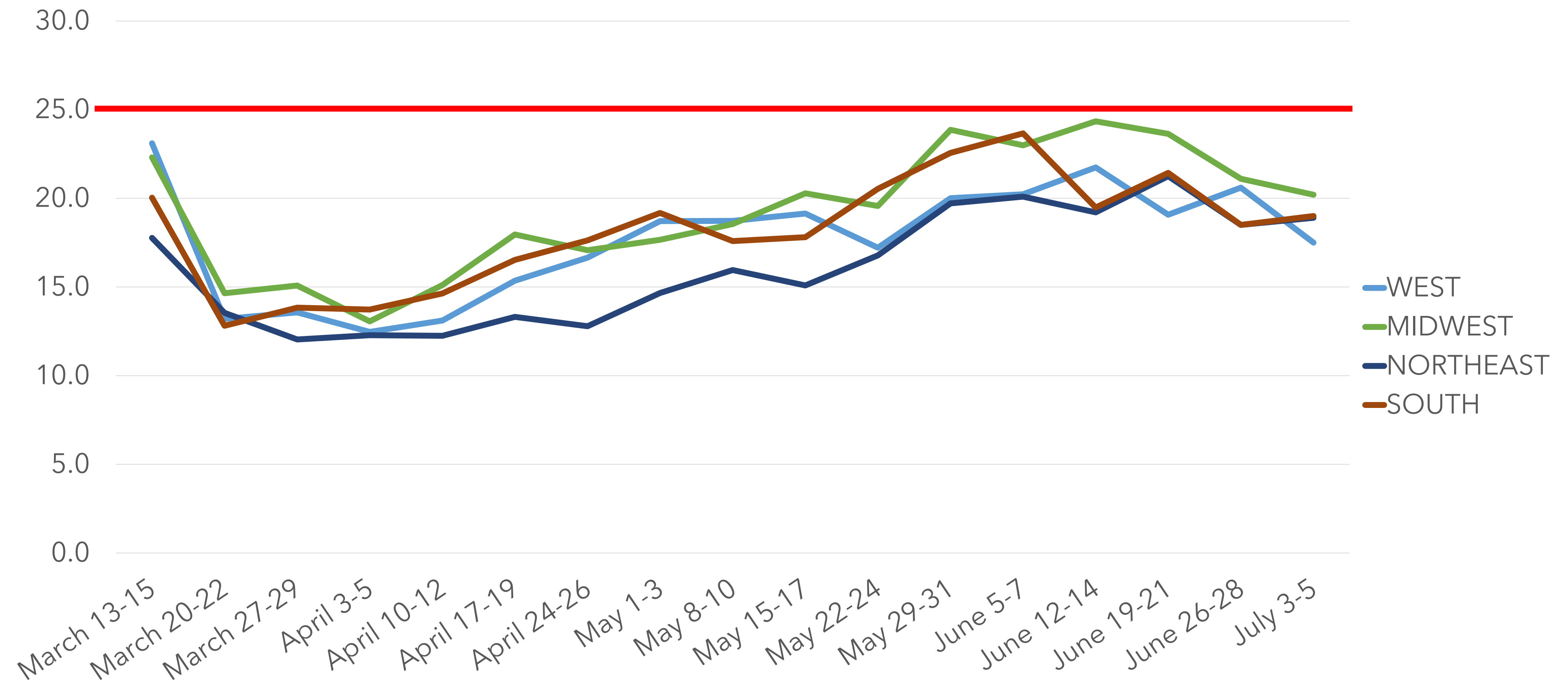




# US Region

## Points of Interest:

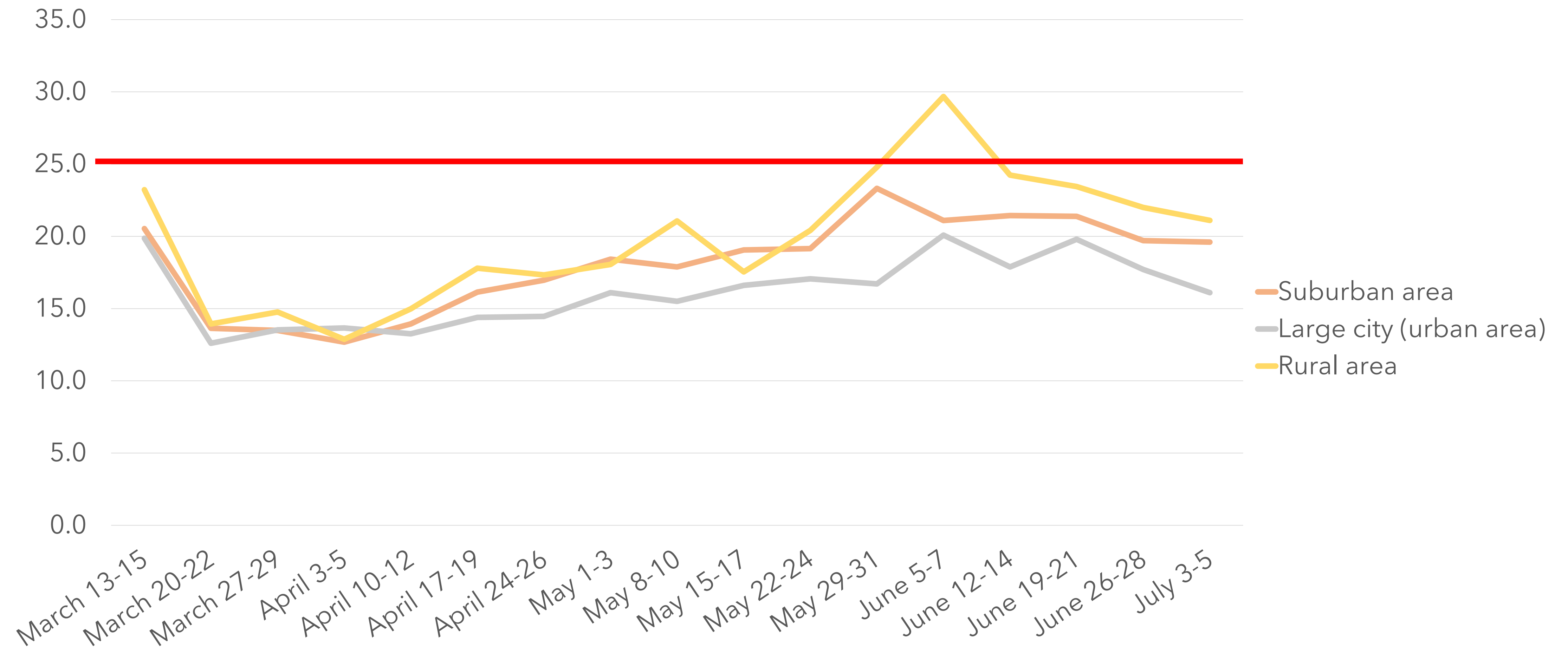
- The Midwest continue to index highest amongst US regions this week.
- The Northeast was the only region this week to report a slight decrease in safety concerns.
- The Midwest and South were the US regions that showed the most excitement for travel and openness for travel messaging.



# Type Of Residence

## Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural and Urban respondents reported the largest relative increases in safety concerns this week.
- Suburban respondents were the most likely to report currently considering visiting a specific destination in the remainder of 2020.

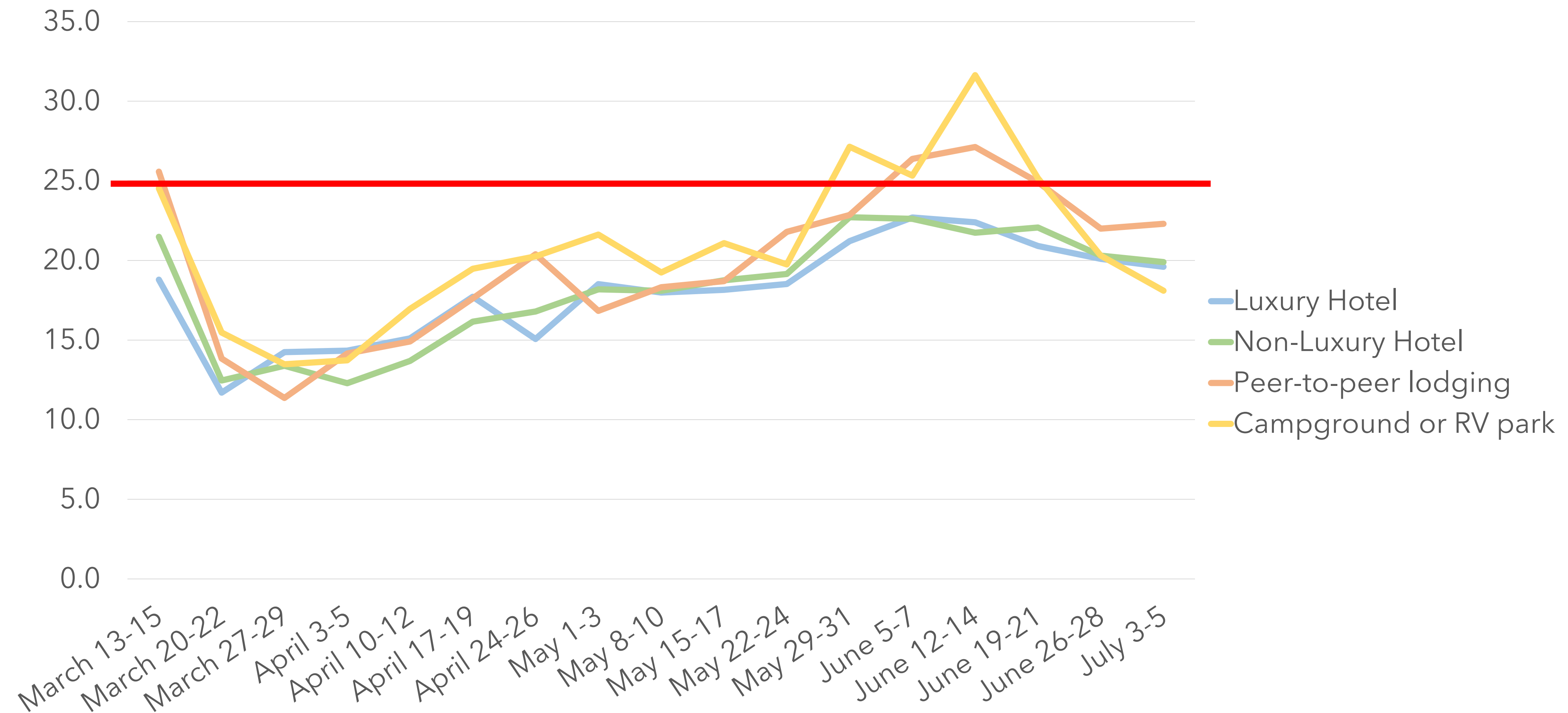




# Lodging Type Used in last 2 years

## Points of Interest:

- Peer-to-peer lodging respondents indexed highest amongst lodging types this week.
- Luxury Hotel and Campground respondents were the most likely to say they'd be likely to take a trip they hadn't already considered if a good opportunity presented itself.







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