

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF AUGUST 16th, 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.



Please consider purchasing, subscribing or donating to support this research
<https://www.destinationanalysts.com/support/>

THANK YOU IN ADVANCE

Key Findings for the Week of August 16th

Please cite Destination Analysts when using or distributing this data

Expectations for the Coronavirus Outbreak

This week, Americans report feeling safer in a number of areas that affect their travel feelings and behaviors.

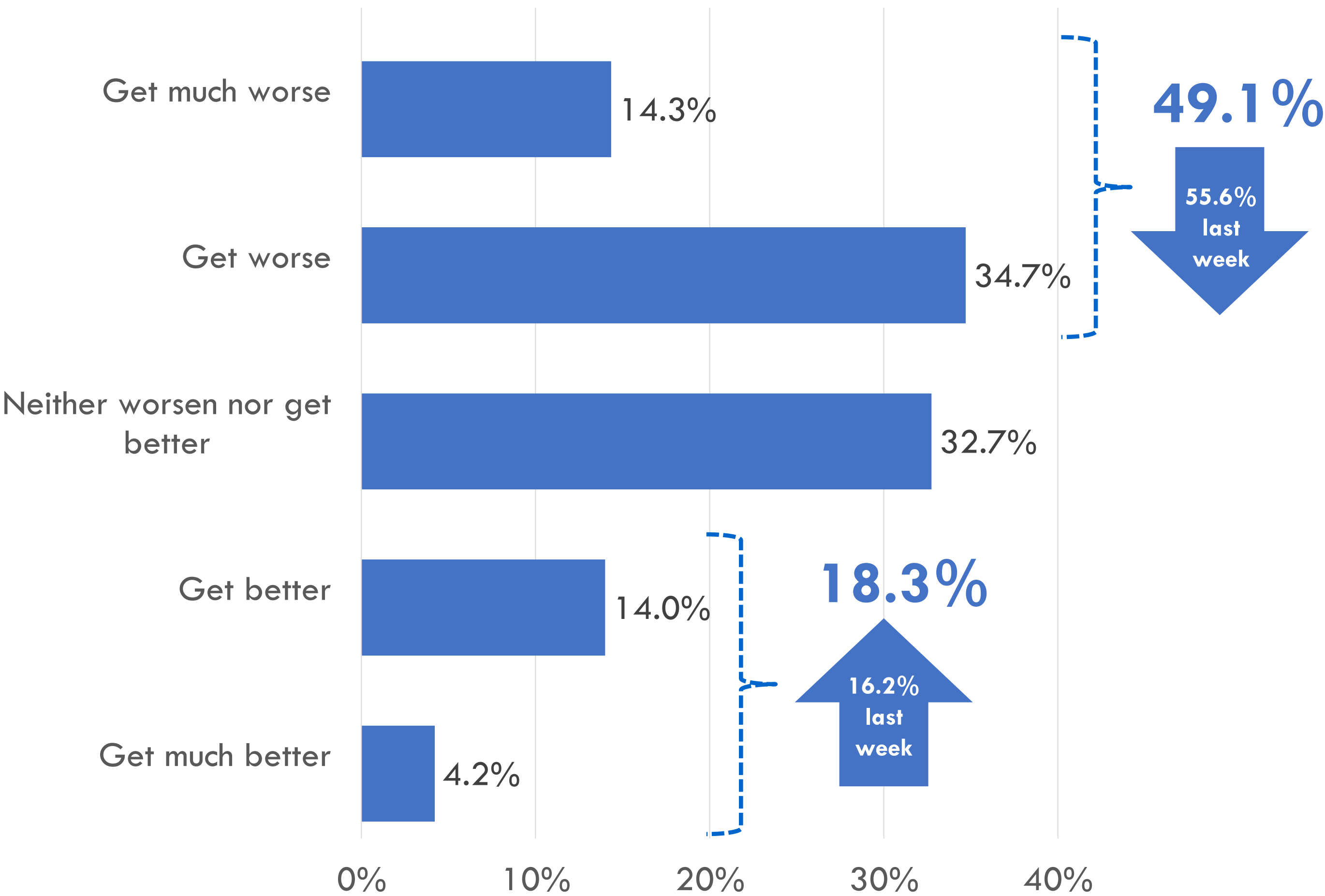
Pandemic-related health and financial safety concerns have dropped to levels last seen in mid-June. **Although there are still notable levels of pessimism, less Americans are feeling the pandemic will worsen in the next month.**

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 23. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

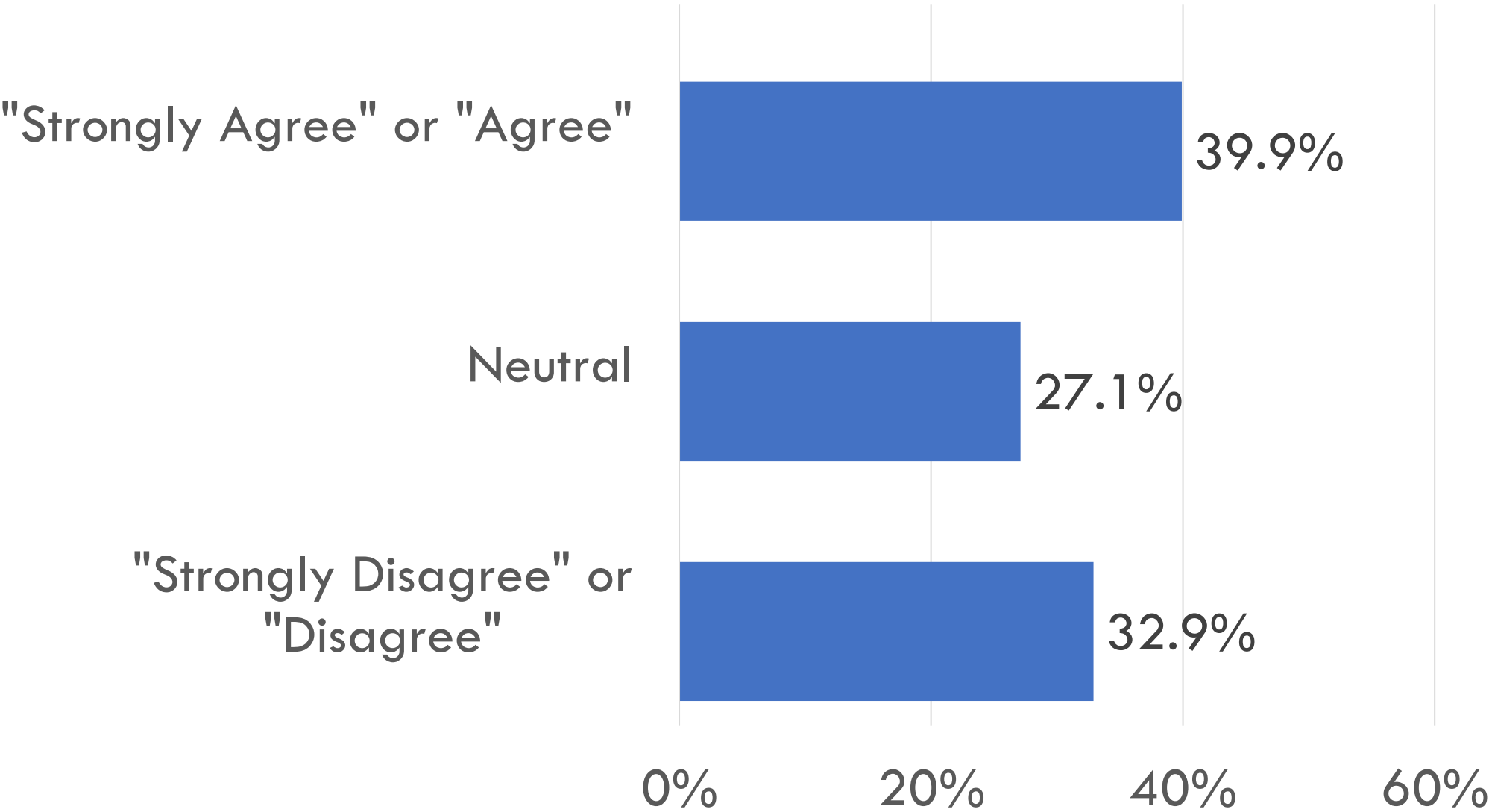
PERCENT DESCRIBING EXPECTATIONS FOR THE SEVERITY OF THE CORONAVIRUS SITUATION IN THE NEXT MONTH



Americans' Comfort in Home Community

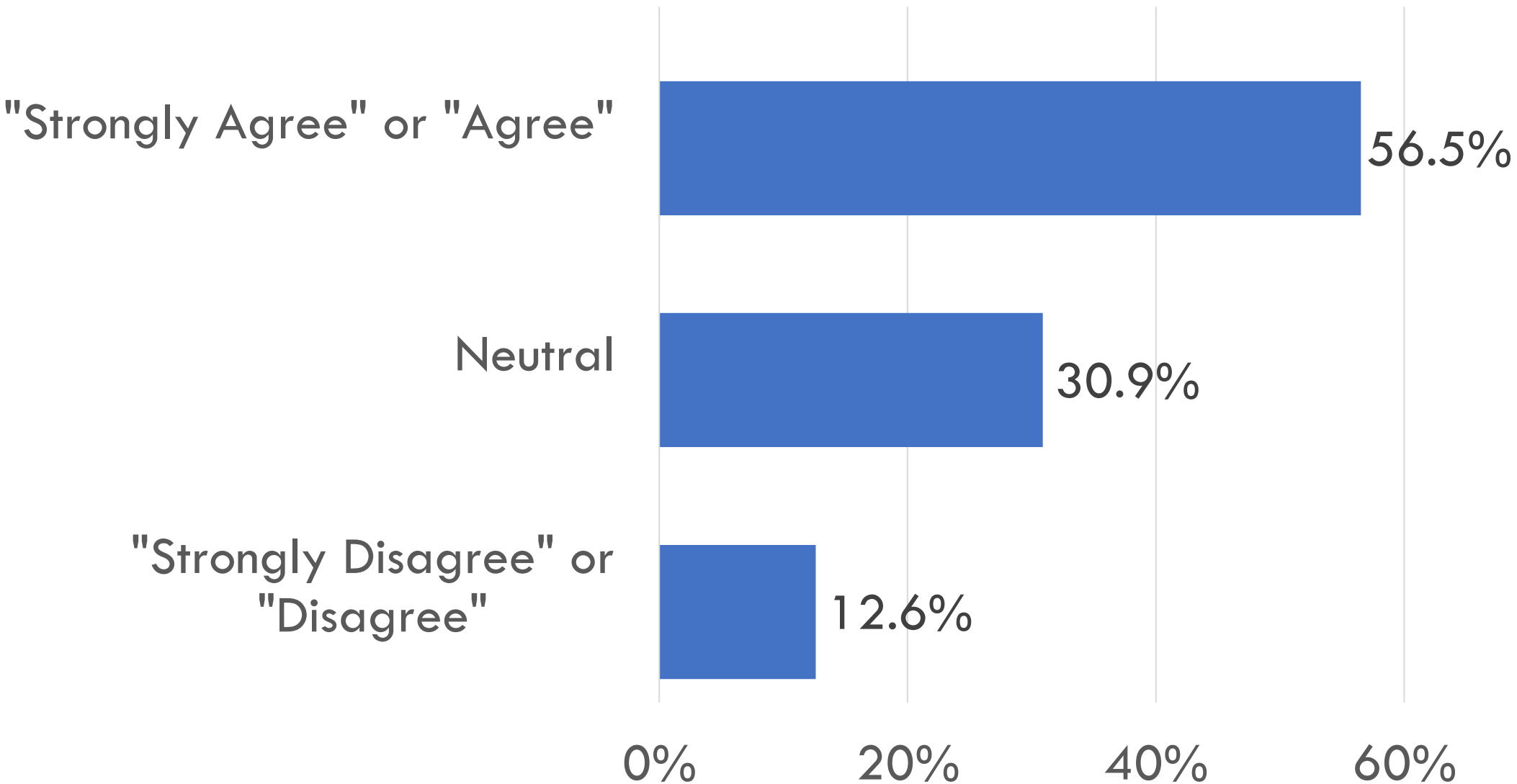
The proportion of American travelers who feels comfortable going out in their own community now exceeds the proportion who do not. And while 56.5% still do not want visitors in their communities yet, this is the lowest this sentiment has been since the week of June 15th.

COMFORT ENJOYING HOME COMMUNITY
(Agreement level)



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.

COMFORT IN TRAVELERS COMING TO VISIT
(Agreement level)

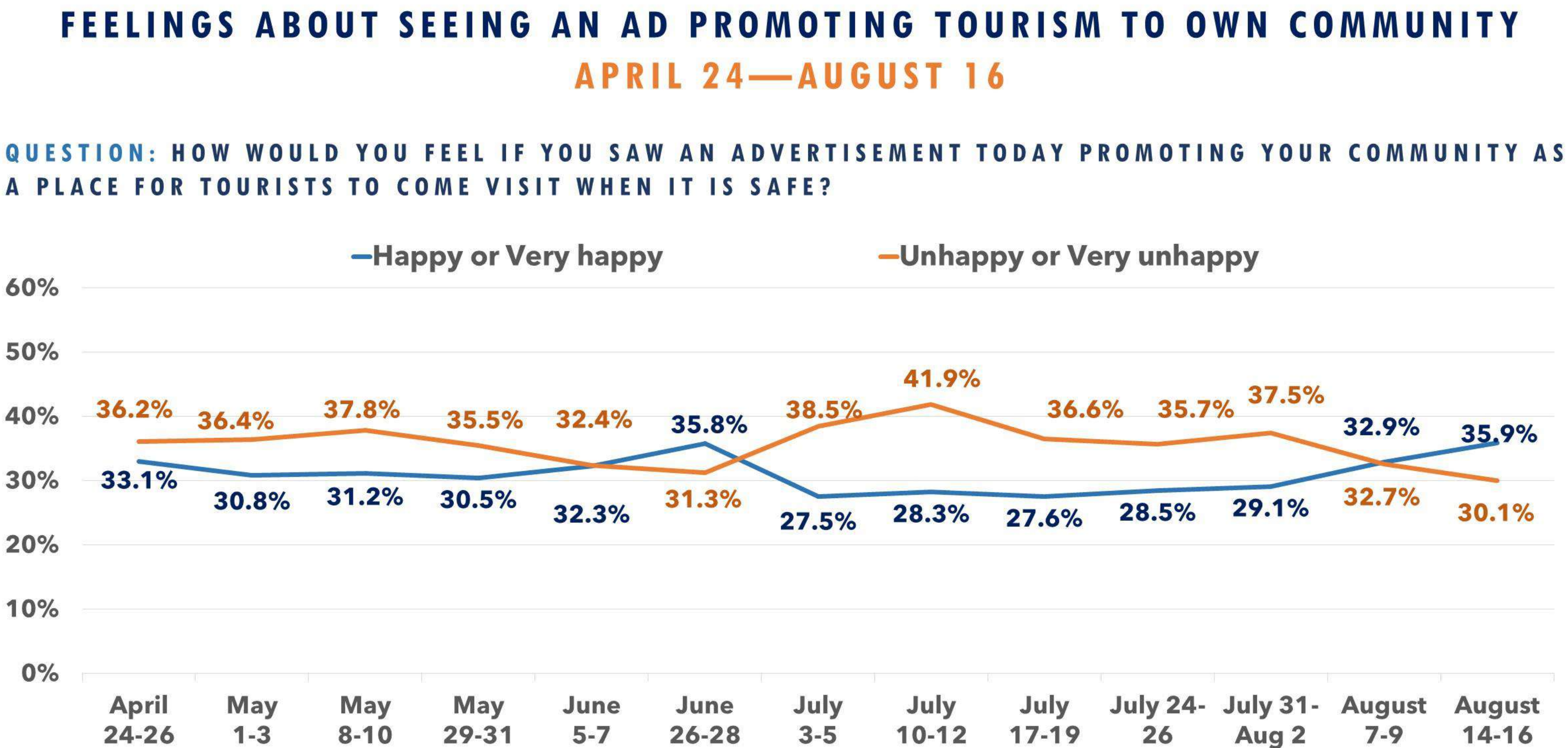


Question: How much do you agree with the following statement?
Statement: I do not want travelers coming to visit my community right now.

(Base: Wave 23. All respondents, 1,202 completed surveys. Data collected Aug 14-16, 2020)

Feelings About Seeing an Ad Promoting Tourism to Own Community

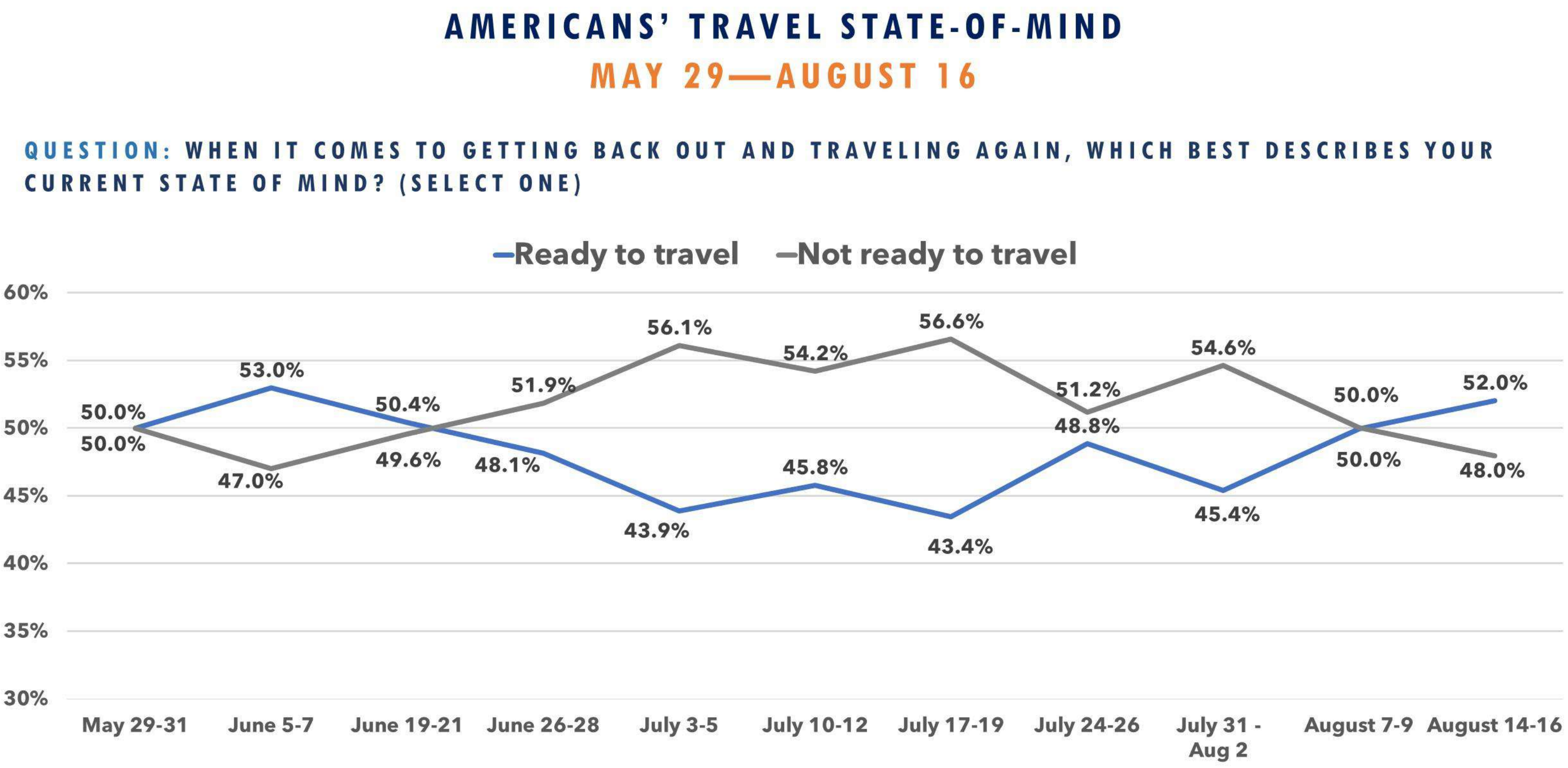
For the first time since June 29th, the percent of Americans who said they would be happy seeing an ad promoting tourism to their community has exceeded the percent who would be unhappy.



(Base: Waves 7-9, 12 and 16-23. All respondents, 1,198, 1,199, 1,250, 1,203, 1,231, 1,200, 1,206, 1,224 1,201 and 1,202 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28, July 3-5, 10-12, 17-19, 24-26, July 21-Aug 2, Aug 7-9 and 14-16, 2020)

Americans’ Travel State-of-Mind (Waves 12-13 and 15-23 Comparison)

Safety perceptions of travel activities have improved overall, nearing June levels. Staycation-ing and the avoidance of conferences and group meetings have declined. **Given all these sentiments, the percent of Americans who report being in a “ready to travel” state of mind is now higher than those who report needing more time to feel ready.**



(Base: Waves 12-13 and 15-23. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collection May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9, Aug 14-16, 2020)

Trip Experiences Traveling Americans Will Prioritize this Year

Those with trip plans for the remainder of the year are commonly prioritizing getting away from crowds and enjoying nature, in addition to spending time with loved ones. However, there is also an important proportion who are prioritizing experiencing new places and excitement in their travel.

Question: Thinking about your travel during the rest of the year, what travel experiences will you prioritize? However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: Wave 23. Respondents planning to travel for leisure later in 2020. 432 completed surveys. Data collected August 14-16, 2020)

TRIP EXPERIENCES TRAVELING AMERICANS WILL PRIORITIZE THIS YEAR

AS OF AUGUST 16TH, 2020



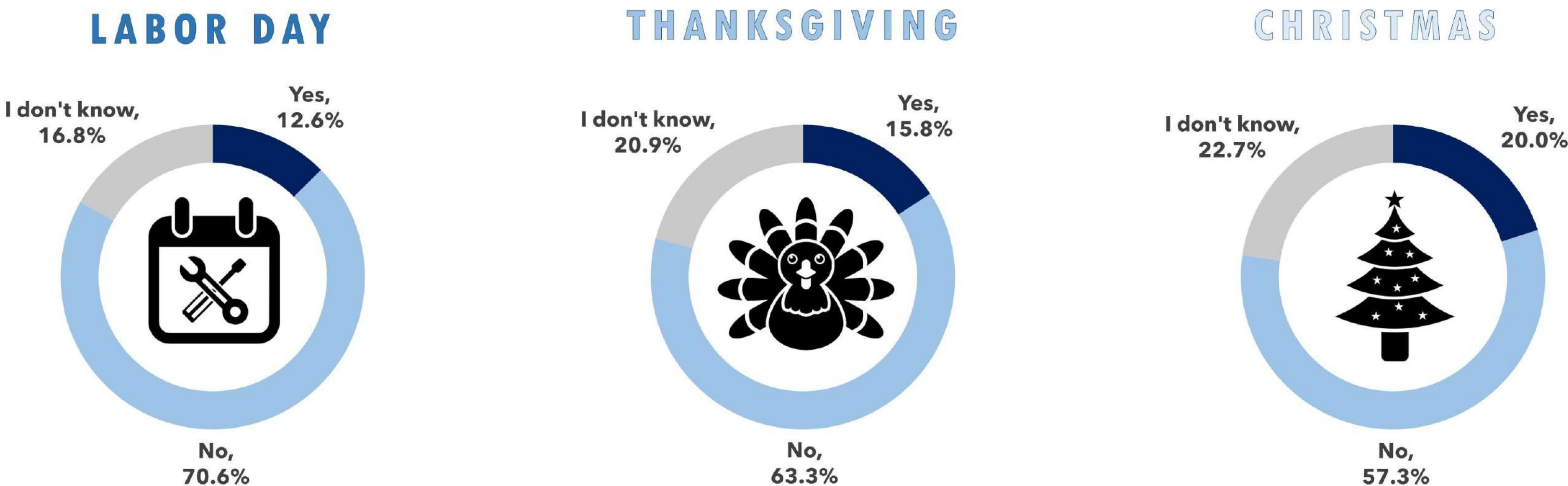
Upcoming Holiday Travel Expectations

As Americans look out to upcoming holidays, there is a gradually increasing expectation to travel for these occasions: Labor Day (12.6%), Thanksgiving (15.8%) and Christmas (20.0%).

Looking even further out over 2021, three-quarters of Americans have at least tentative trip plans right now. Just 25% say they have no plans to travel through 2021.

UPCOMING HOLIDAY TRAVEL EXPECTATIONS

AS OF AUGUST 16TH, 2020



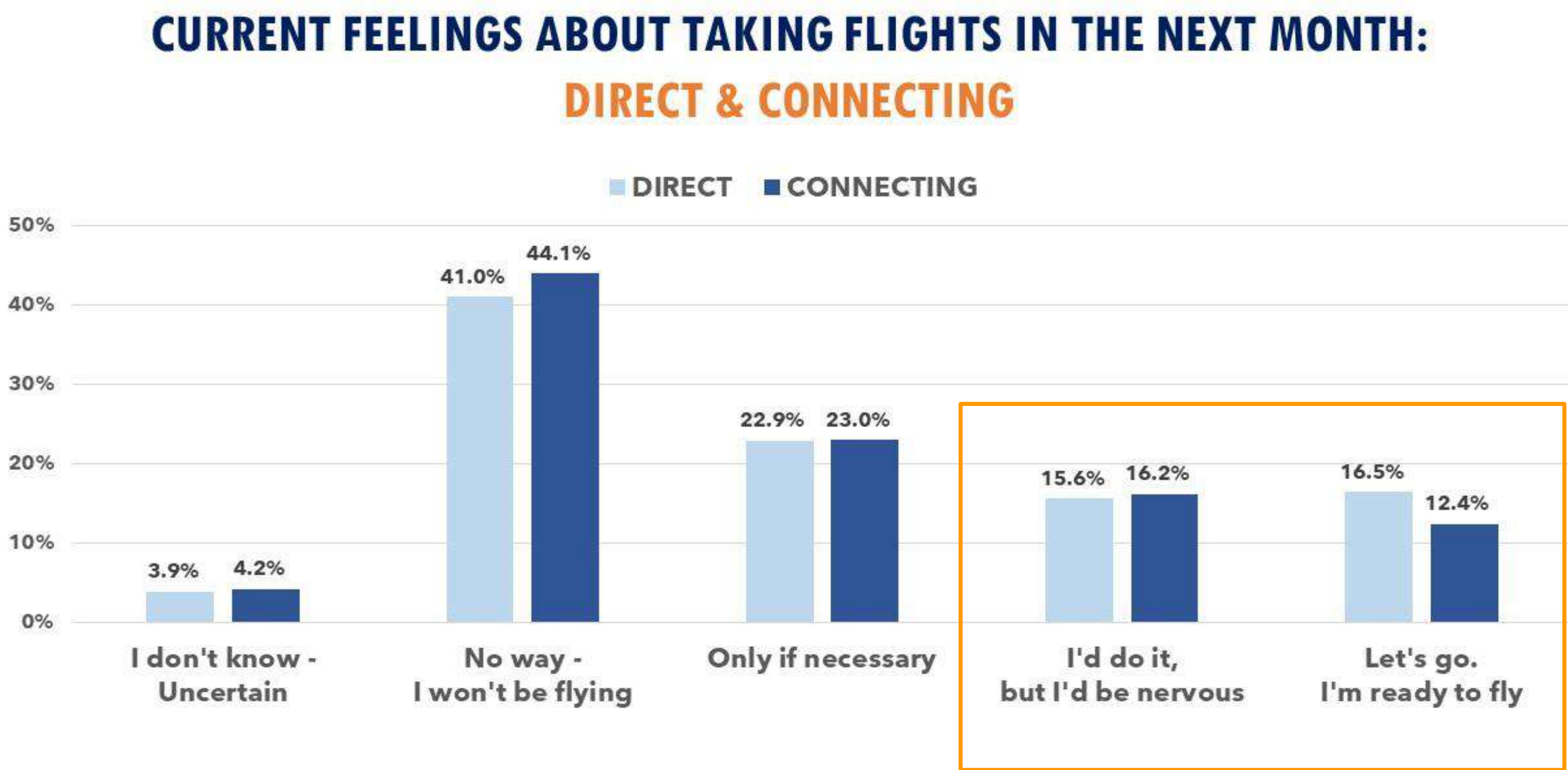
Questions: Will you be traveling over the [Holiday] this year?

(Base: Wave 23. All respondents, 1,221 completed surveys. Data collected August 14-16, 2020)

Current Feelings about Taking Flights in the Next Month

When it comes to air travel, approximately 30 percent would be up for taking a flight in the next month, although half of this group would still be nervous. **There is somewhat more comfort with direct flights than those that require a connection.**

When asked to rate the most unsafe aspects of air travel right now, the behavior of other passengers is far and away what concerns travelers the most.



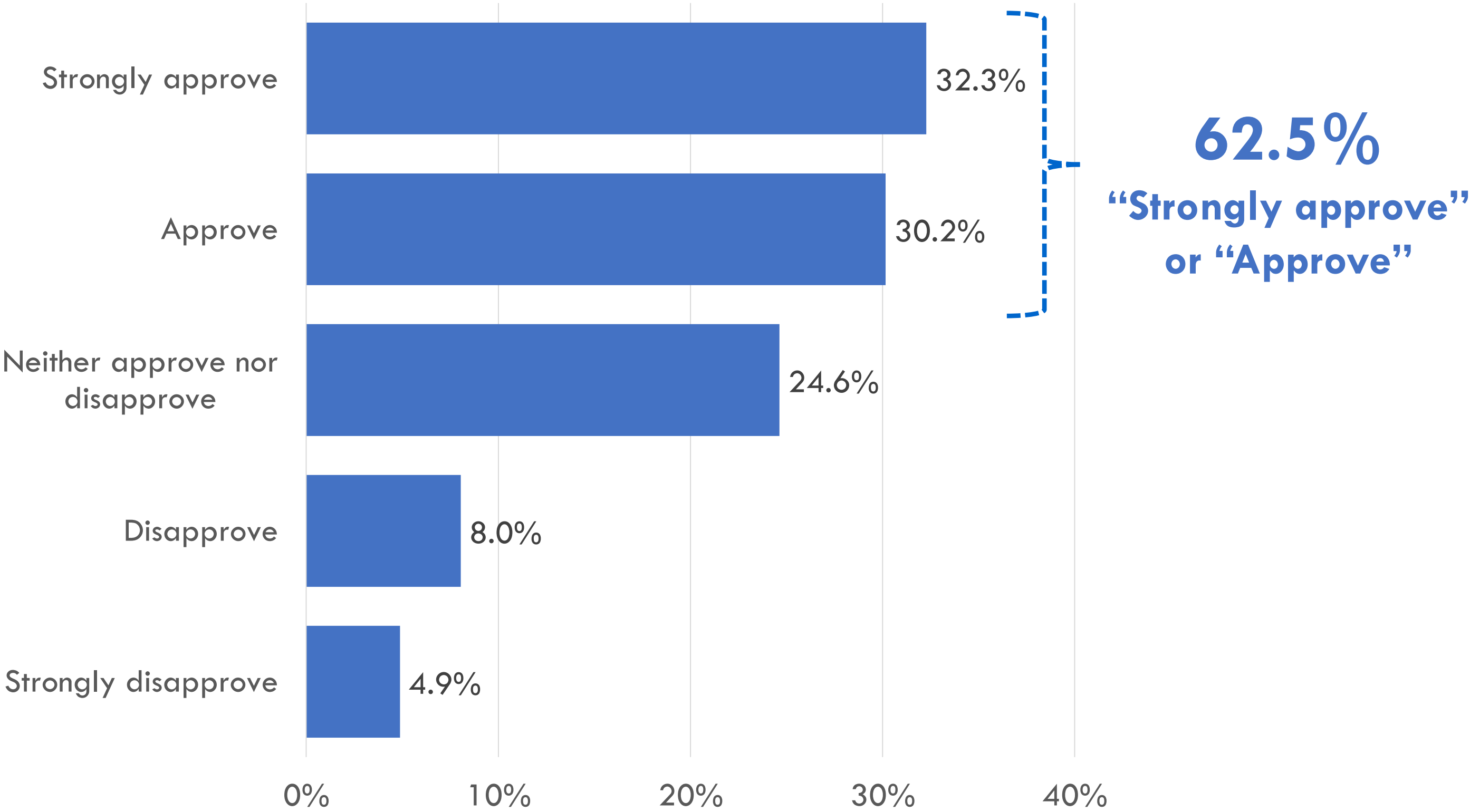
Question 1: Which best describes how you would feel about taking a direct flight on a commercial airline in the next month?
Question 2: Which best describes how you would feel about taking a flight that required connections on a commercial airline in the next month?

(Base: Wave 23. All respondents, 1,202 completed surveys. Data collected August 14-16, 2020)

Opinions on State Travel Restrictions

LEVEL OF APPROVAL REGARDING STATE TRAVEL RESTRICTIONS

Current domestic travel restriction policies intended to curb the spread of COVID-19 seem to be largely accepted at the moment. When asked about the policies of some U.S. states requiring that travelers from high coronavirus-risk states take actions such as presenting a negative COVID-19 test or quarantining for 14 days, 62.5% of American travelers say they approve or strongly approve of such travel restrictions right now. 24.6% feel neutral and 12.9% disapprove.



Question: Some U.S. States are requiring that travelers from high-risk states take action such as showing a negative COVID-19 test or opting to self-quarantine for 14 days. Which best describes how you feel about these policies? (Select one)

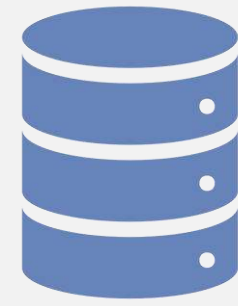
(Base: Wave 23. All respondents, 1,193 completed surveys. Data collected Aug 14-16, 2020)



Coronavirus Travel Sentiment Index

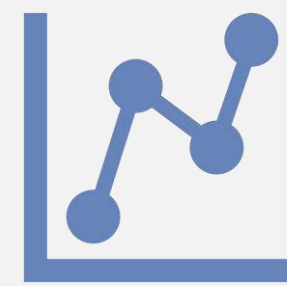
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 16th



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

What is a Predictive Index?



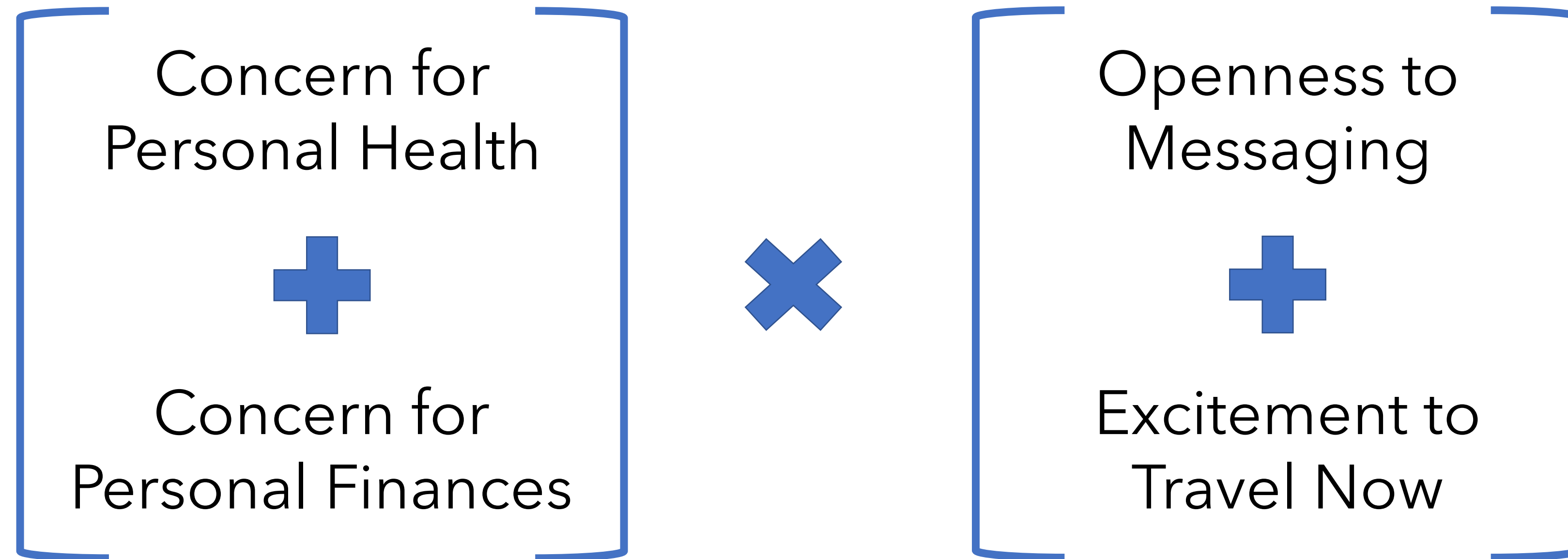
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

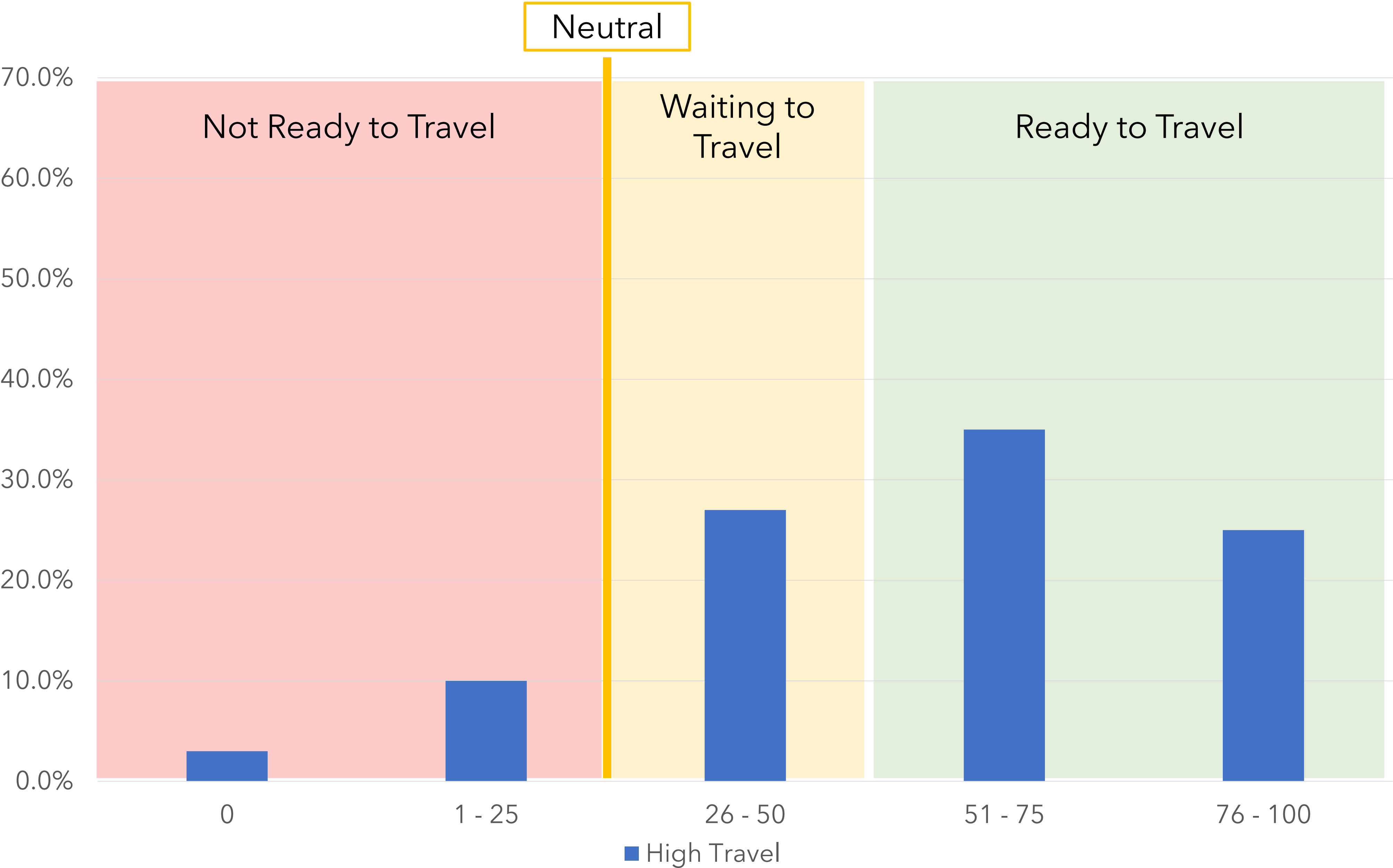
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



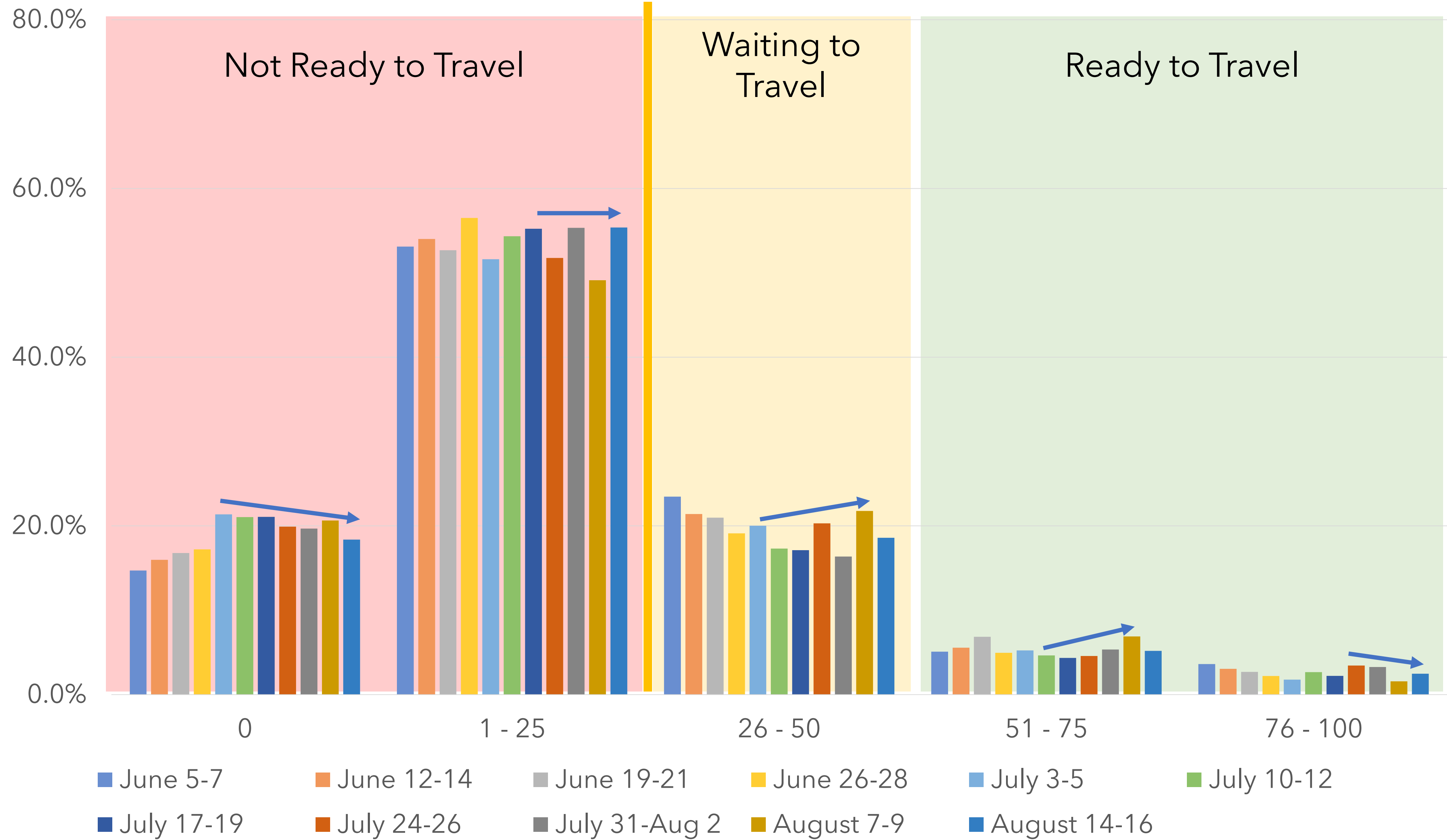
*Normalized to a 100pt scale

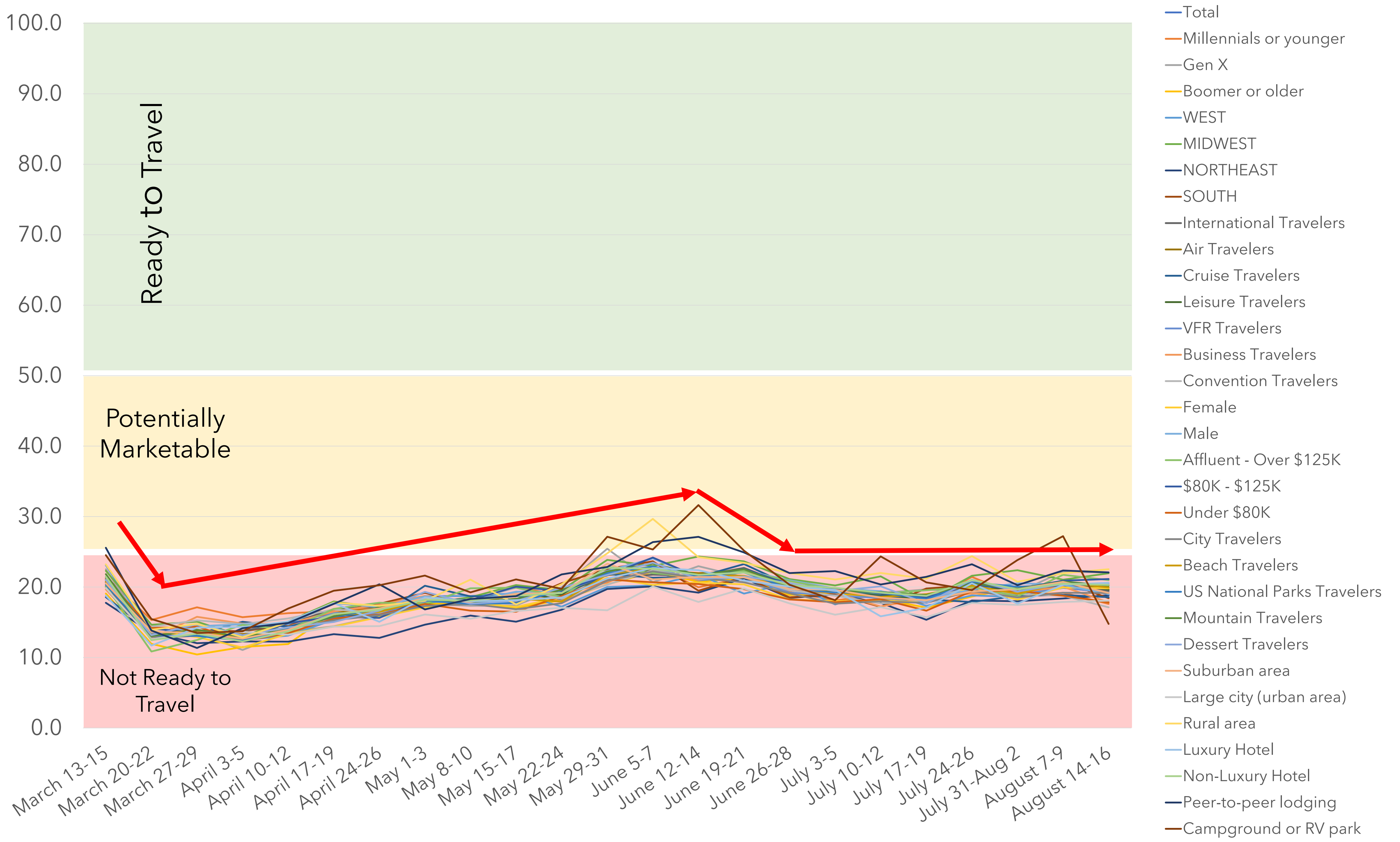
Healthy Travel Outlook

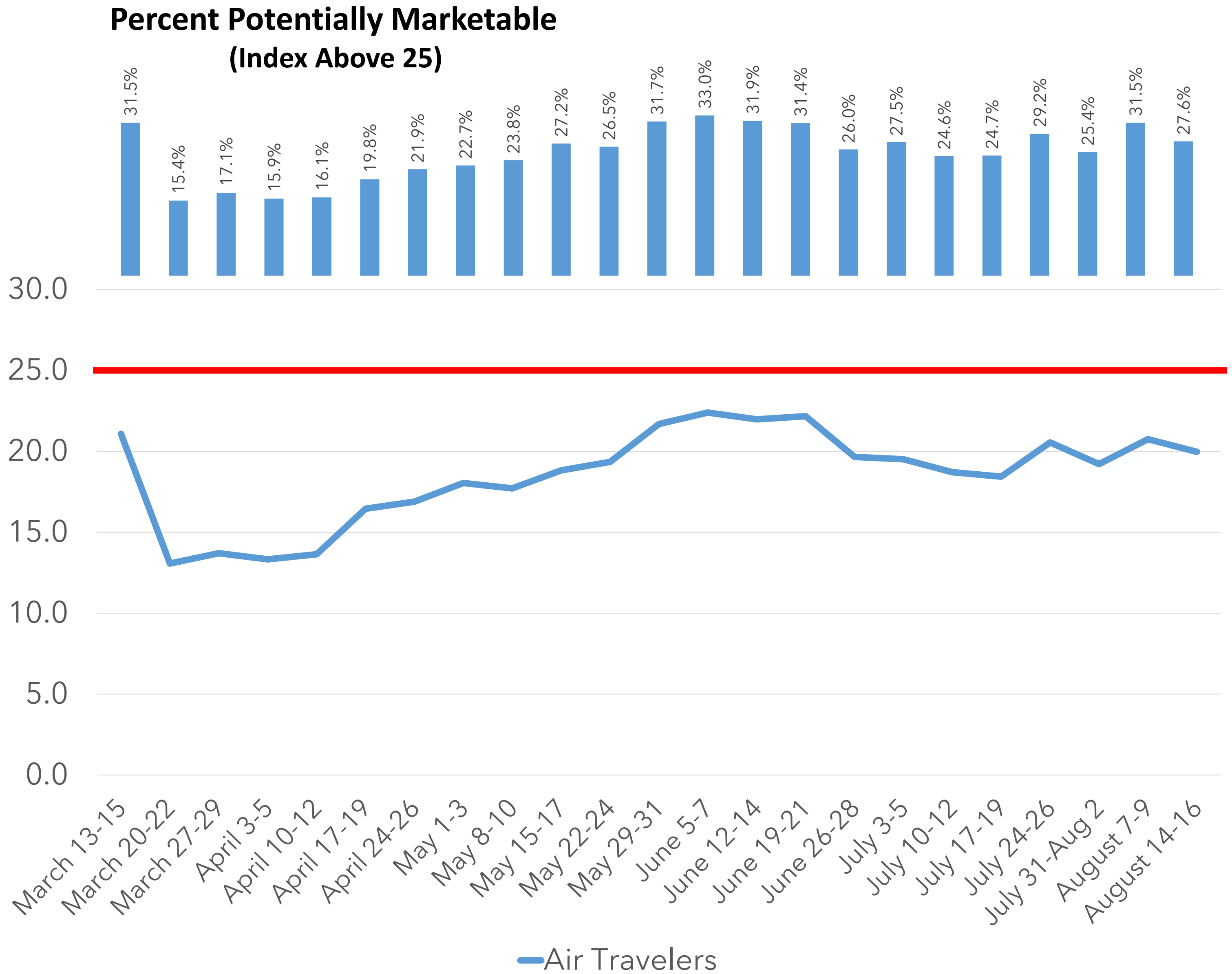
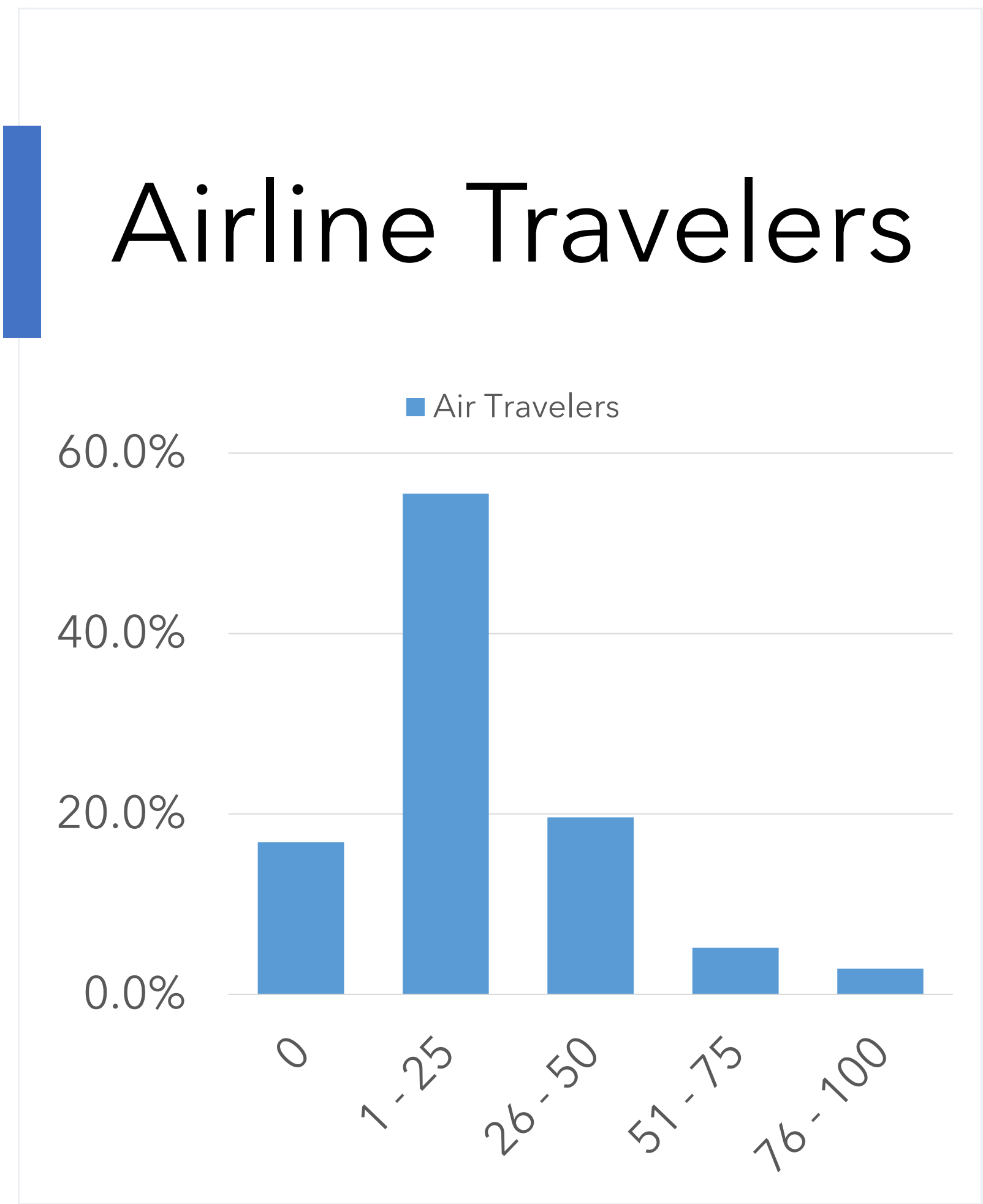


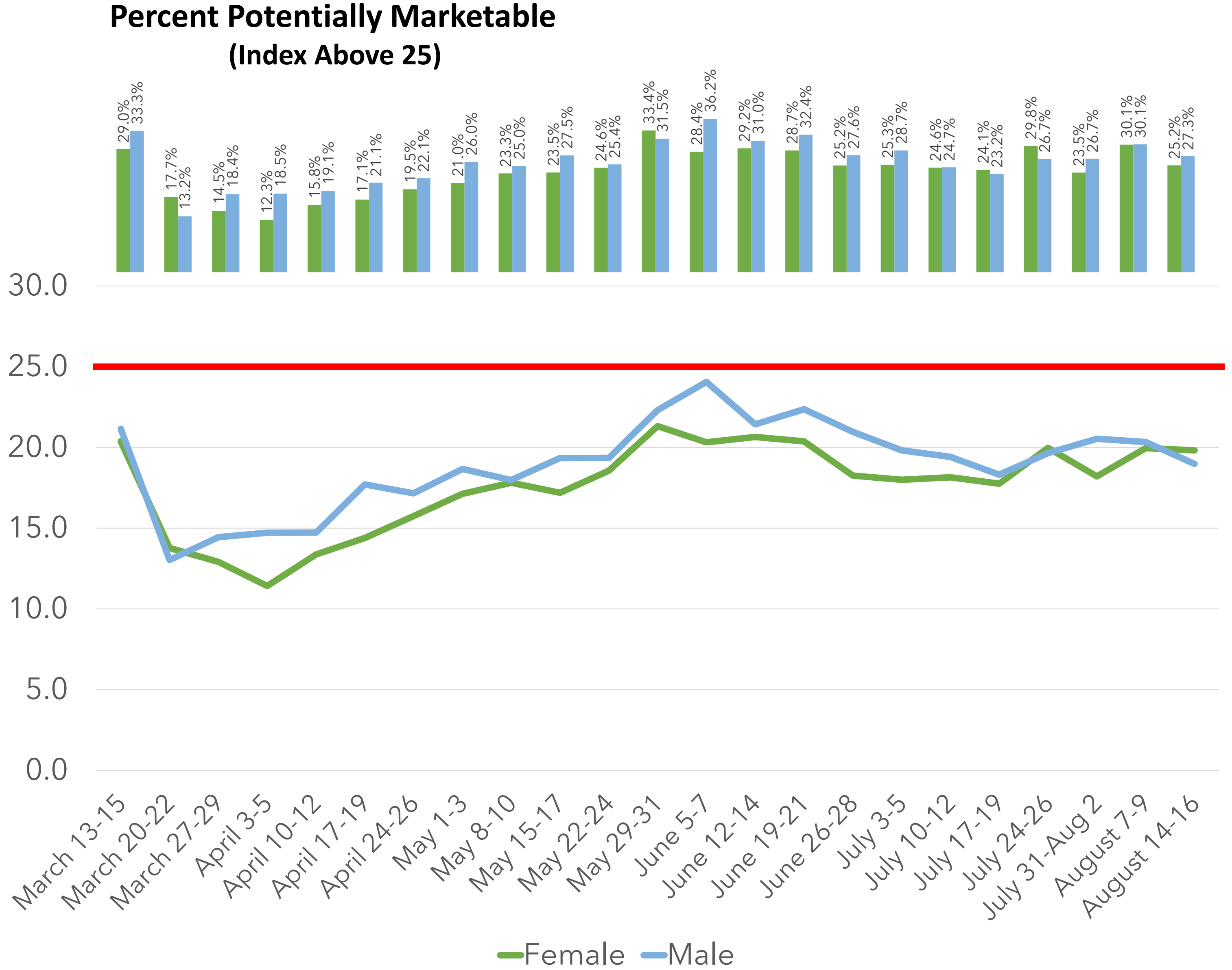
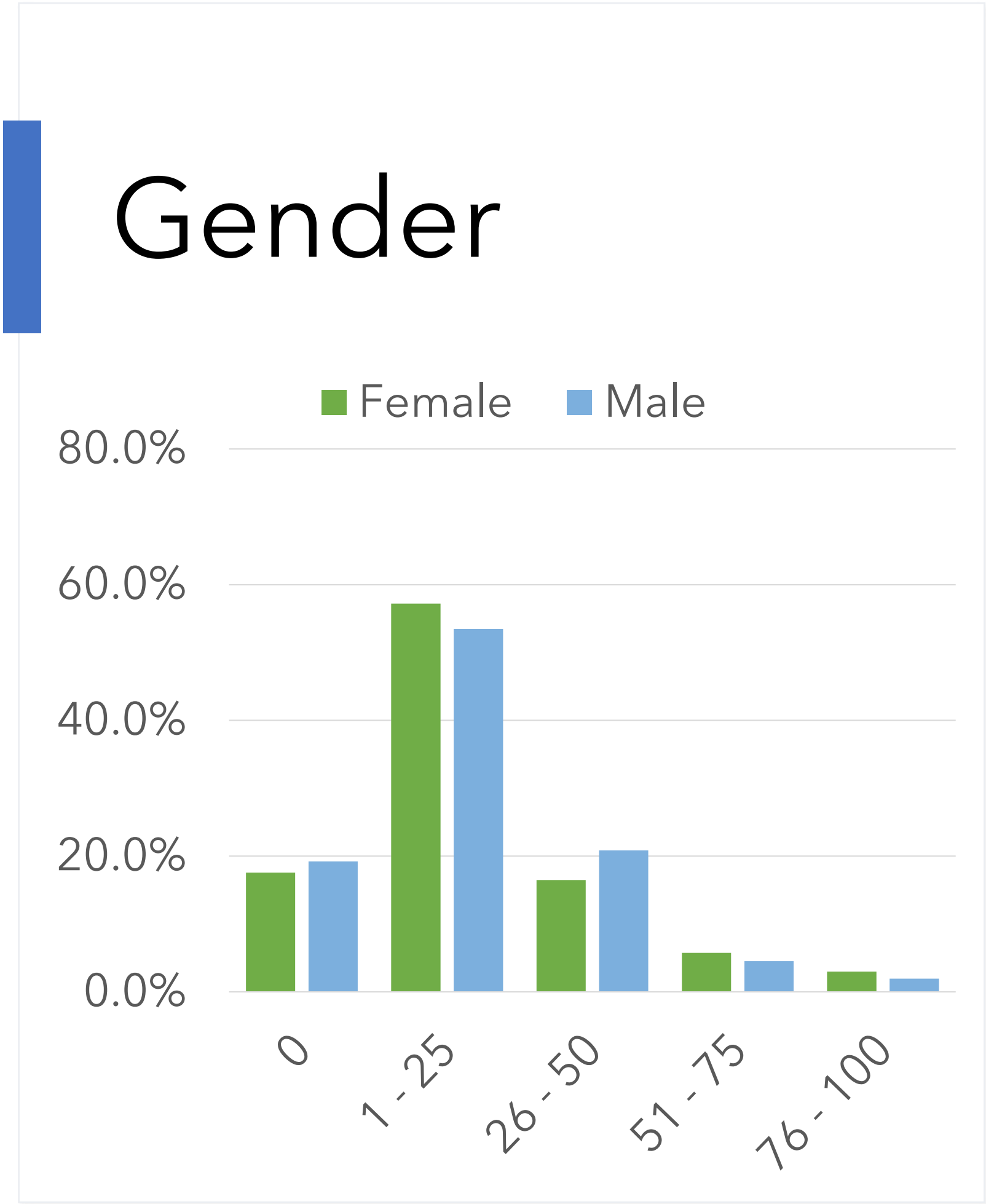
Travel Outlook

Neutral



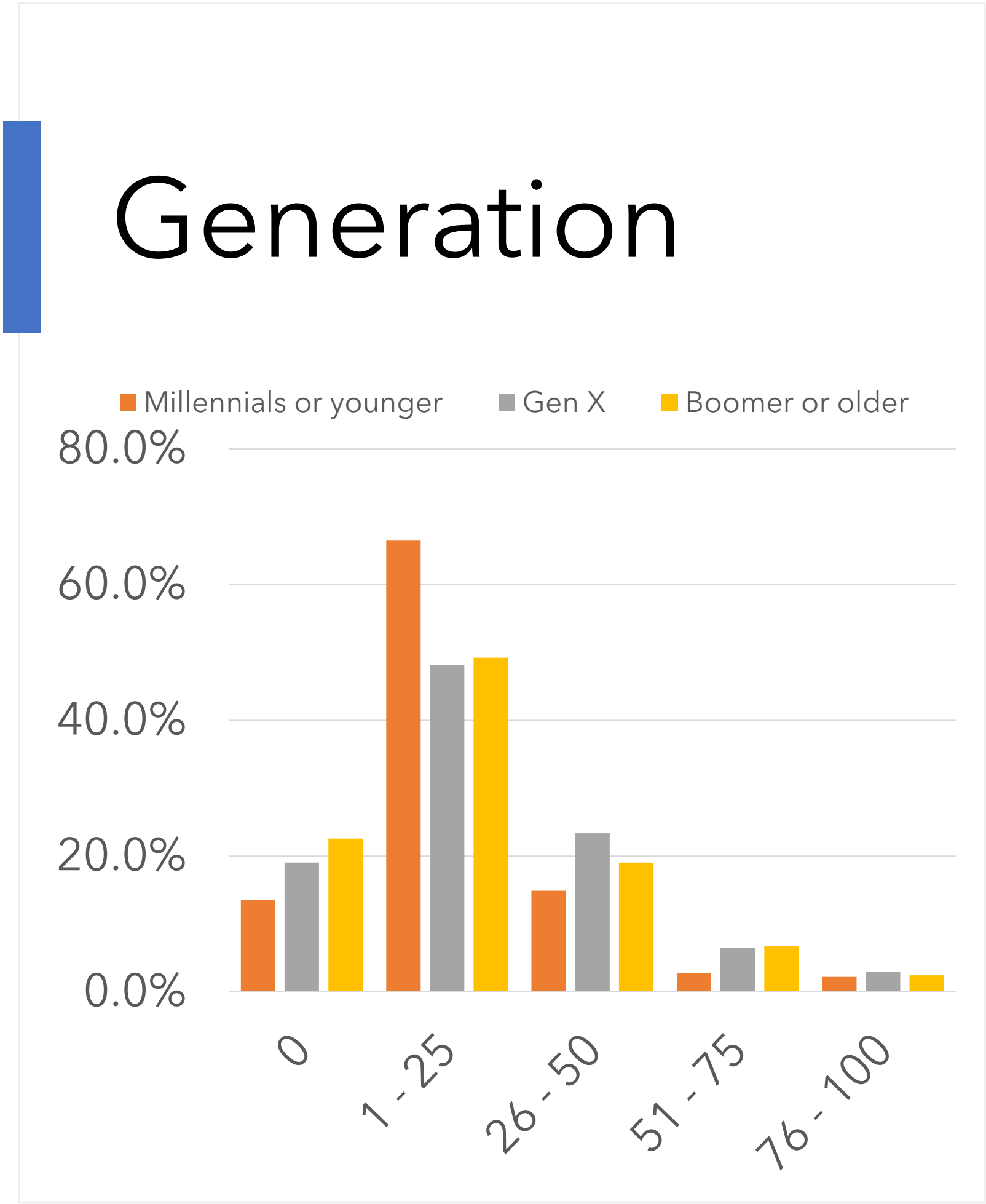




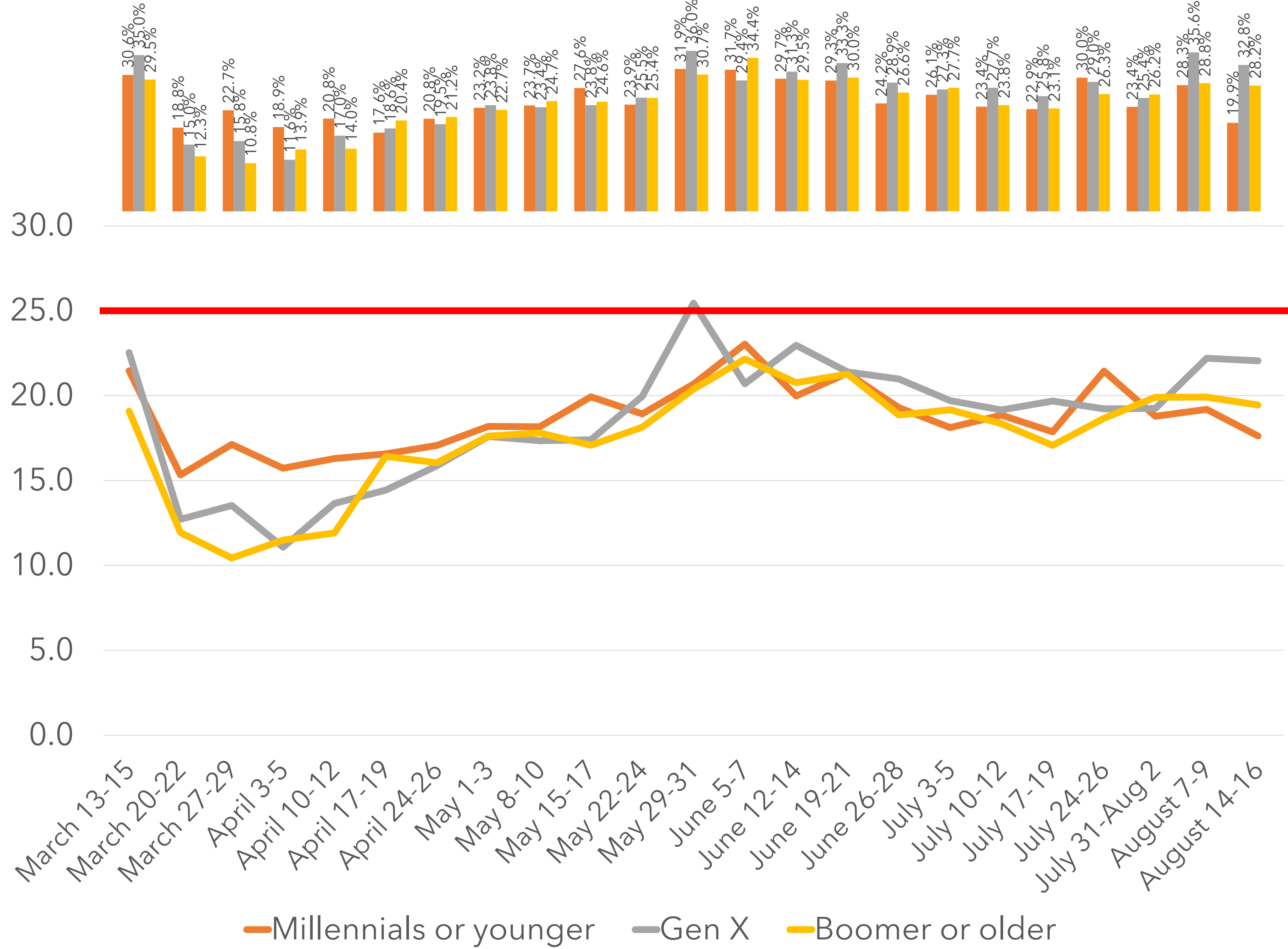


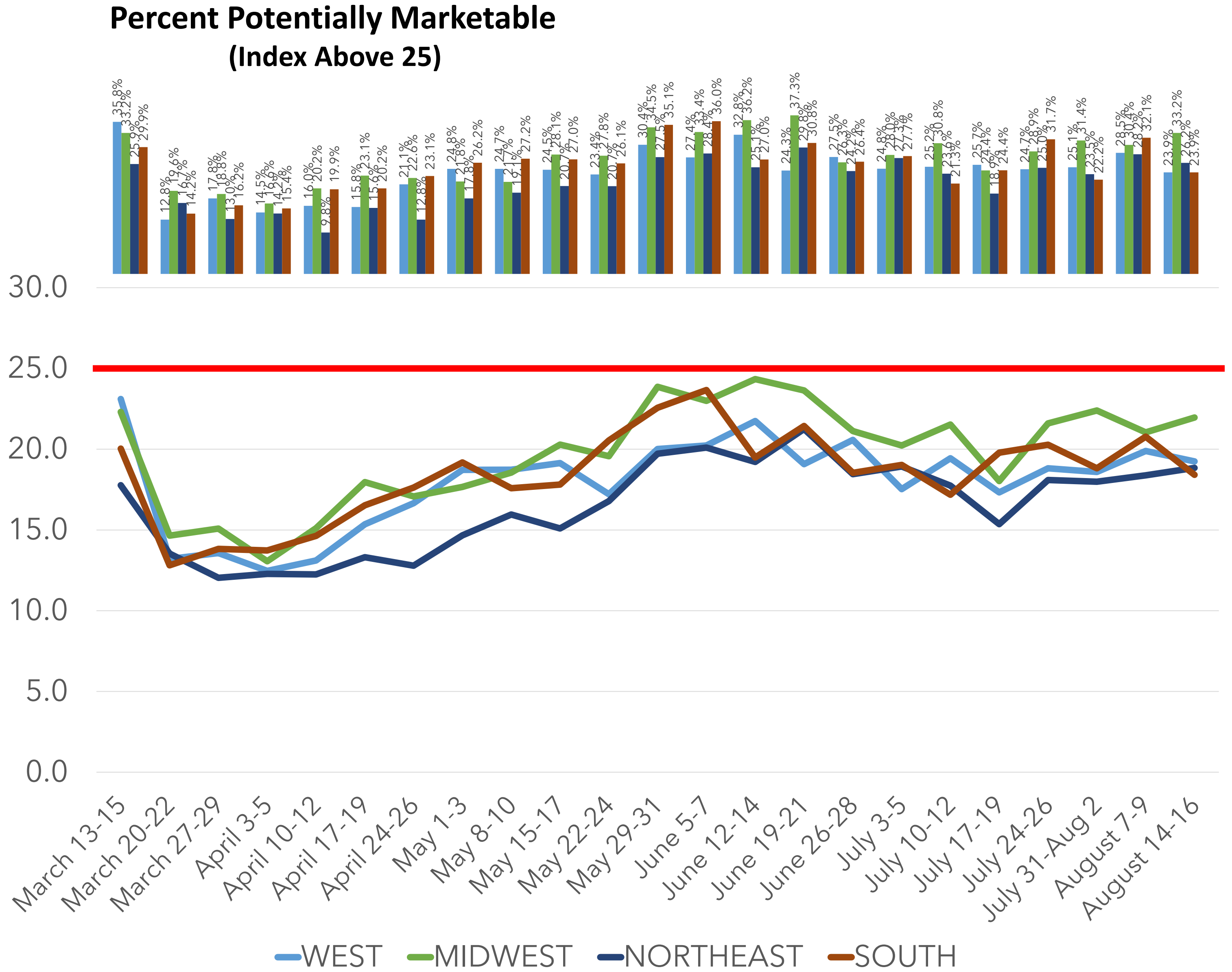
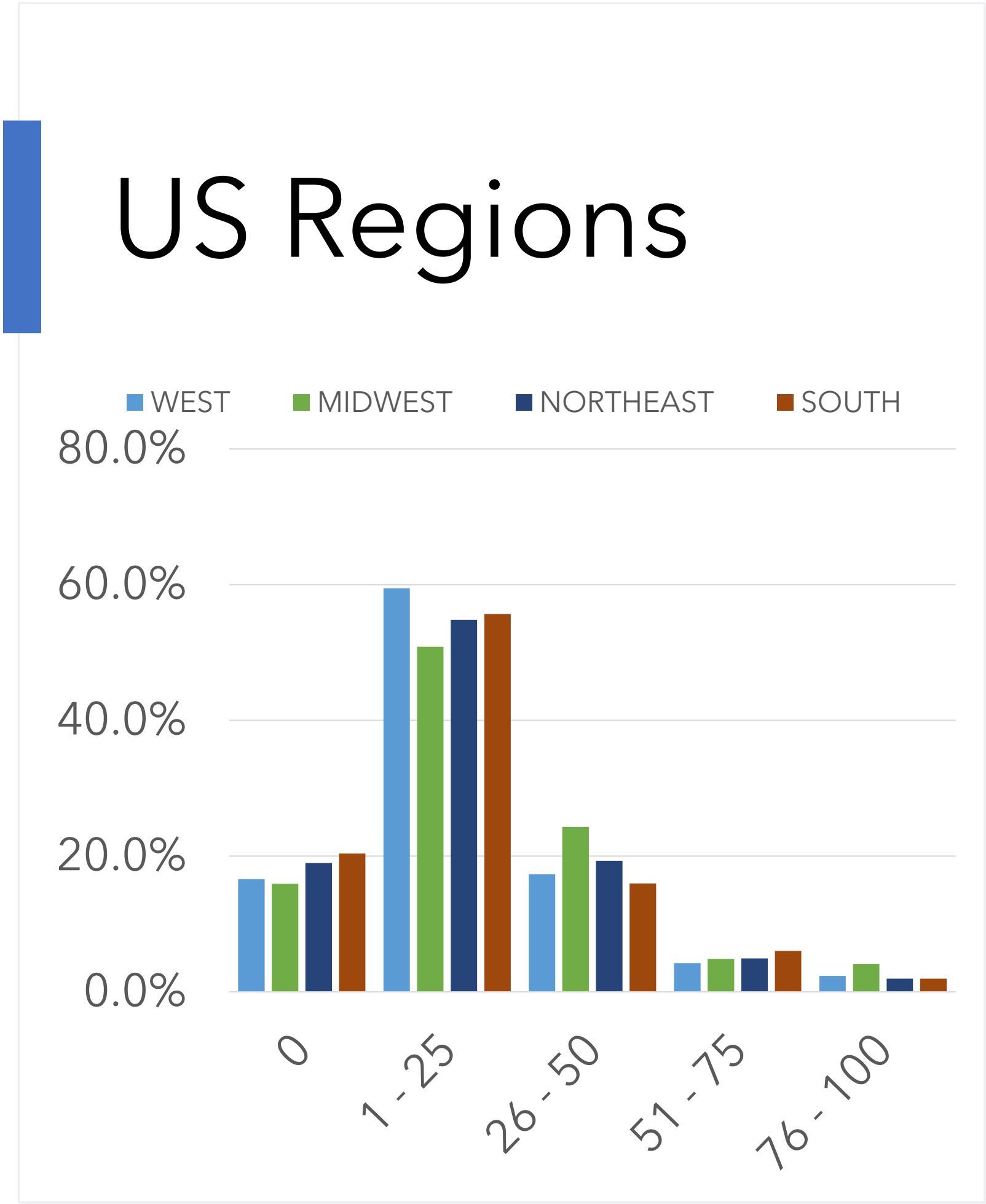


Generation



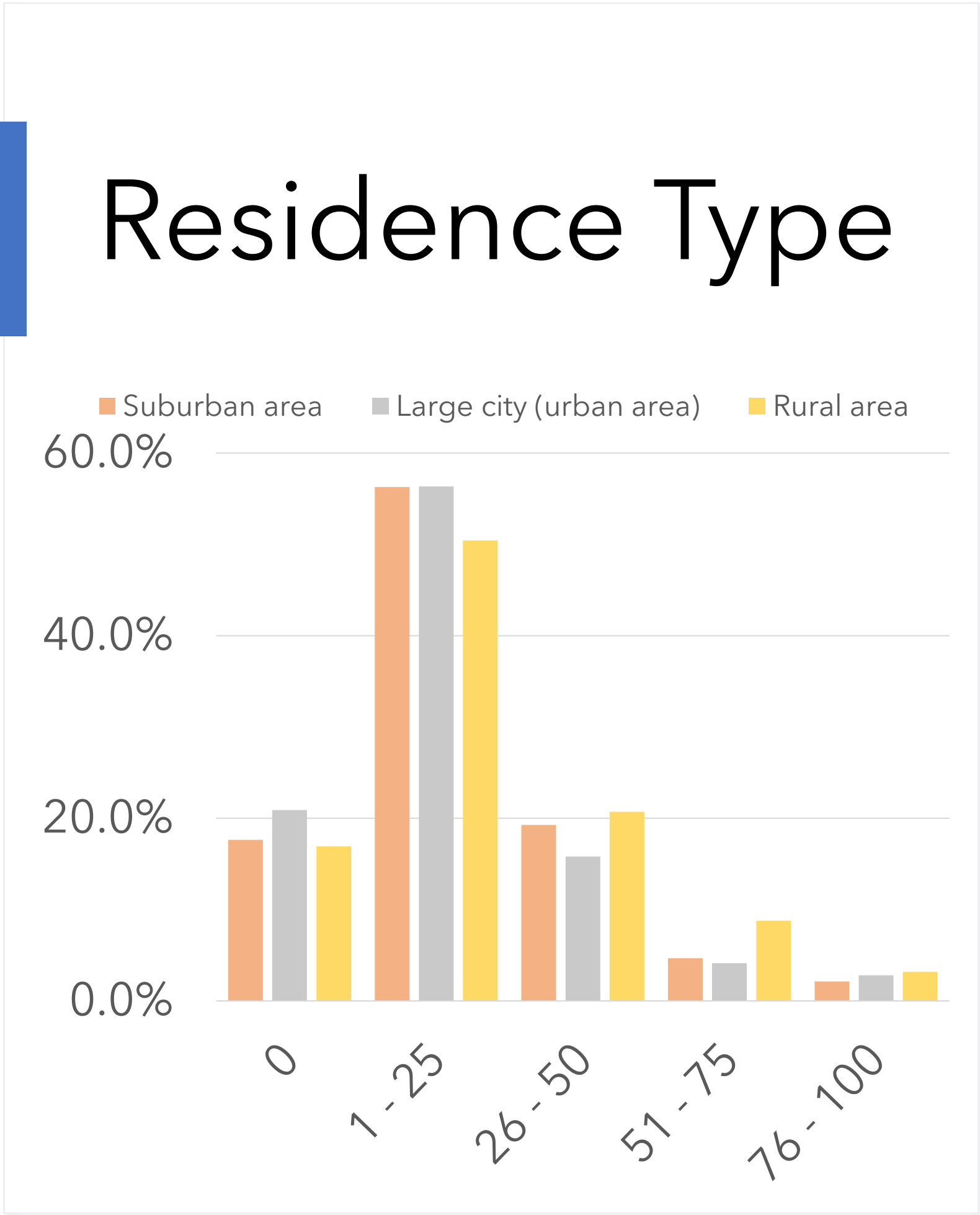
Percent Potentially Marketable (Index Above 25)



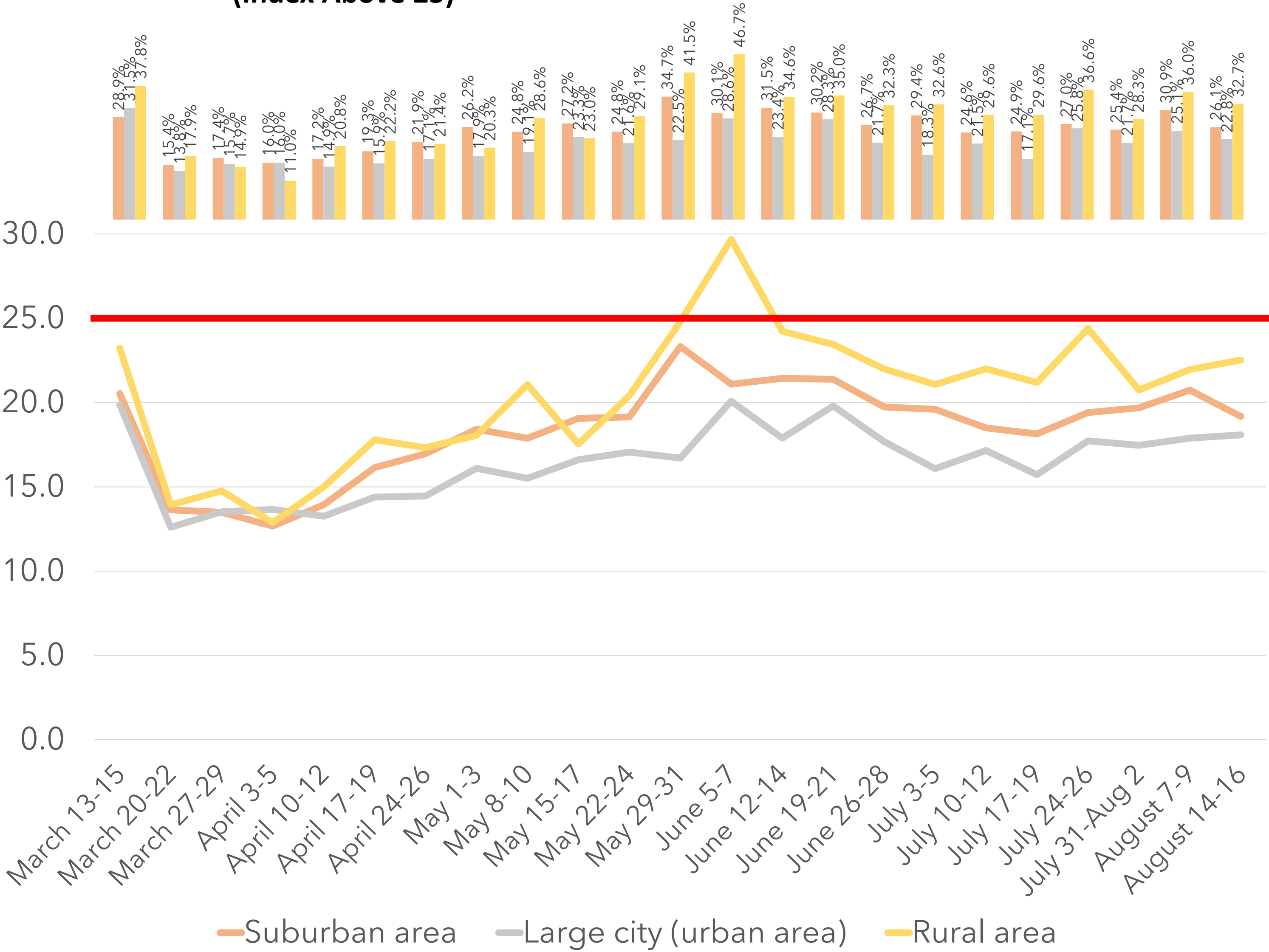




Residence Type

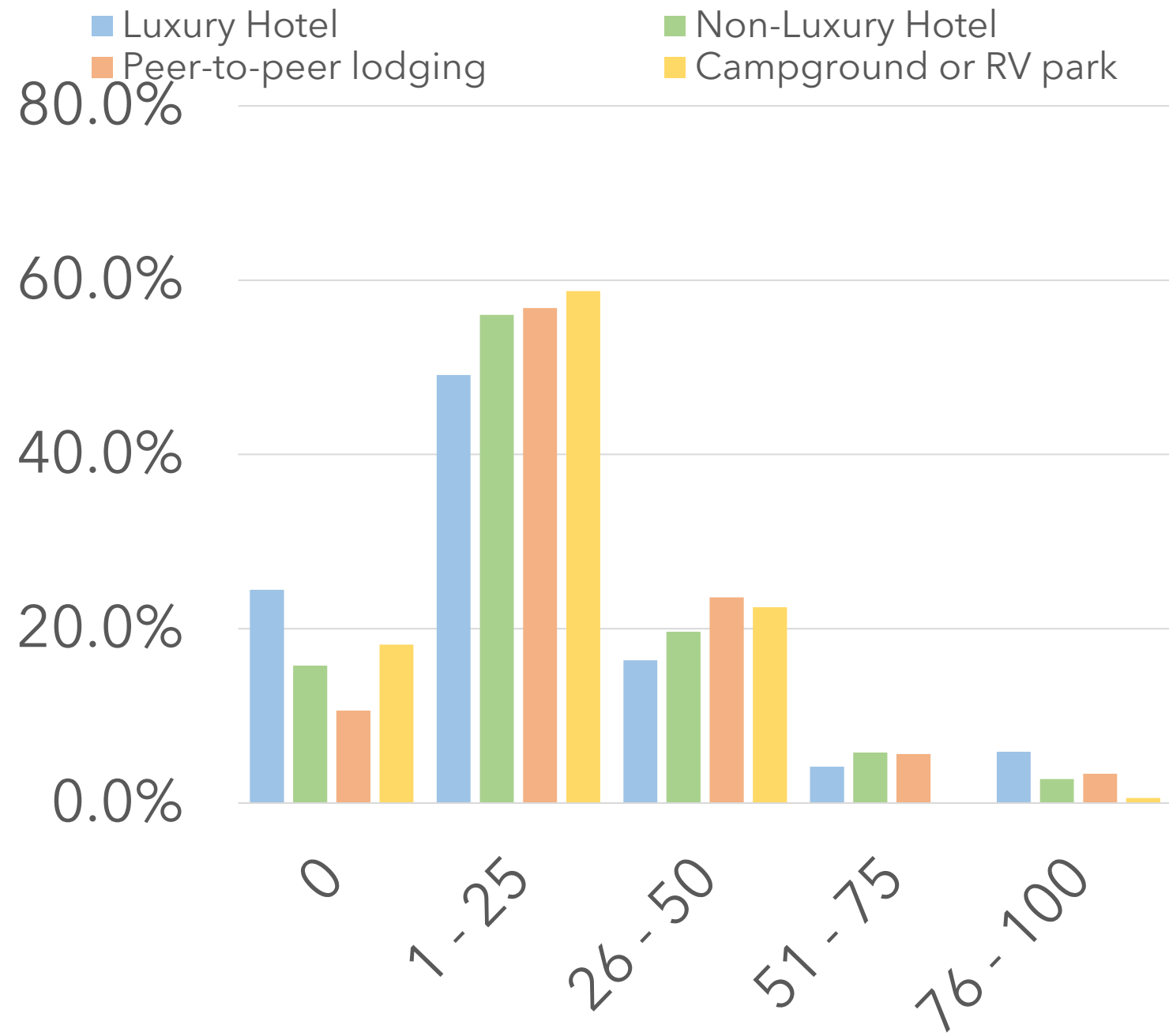


Percent Potentially Marketable (Index Above 25)

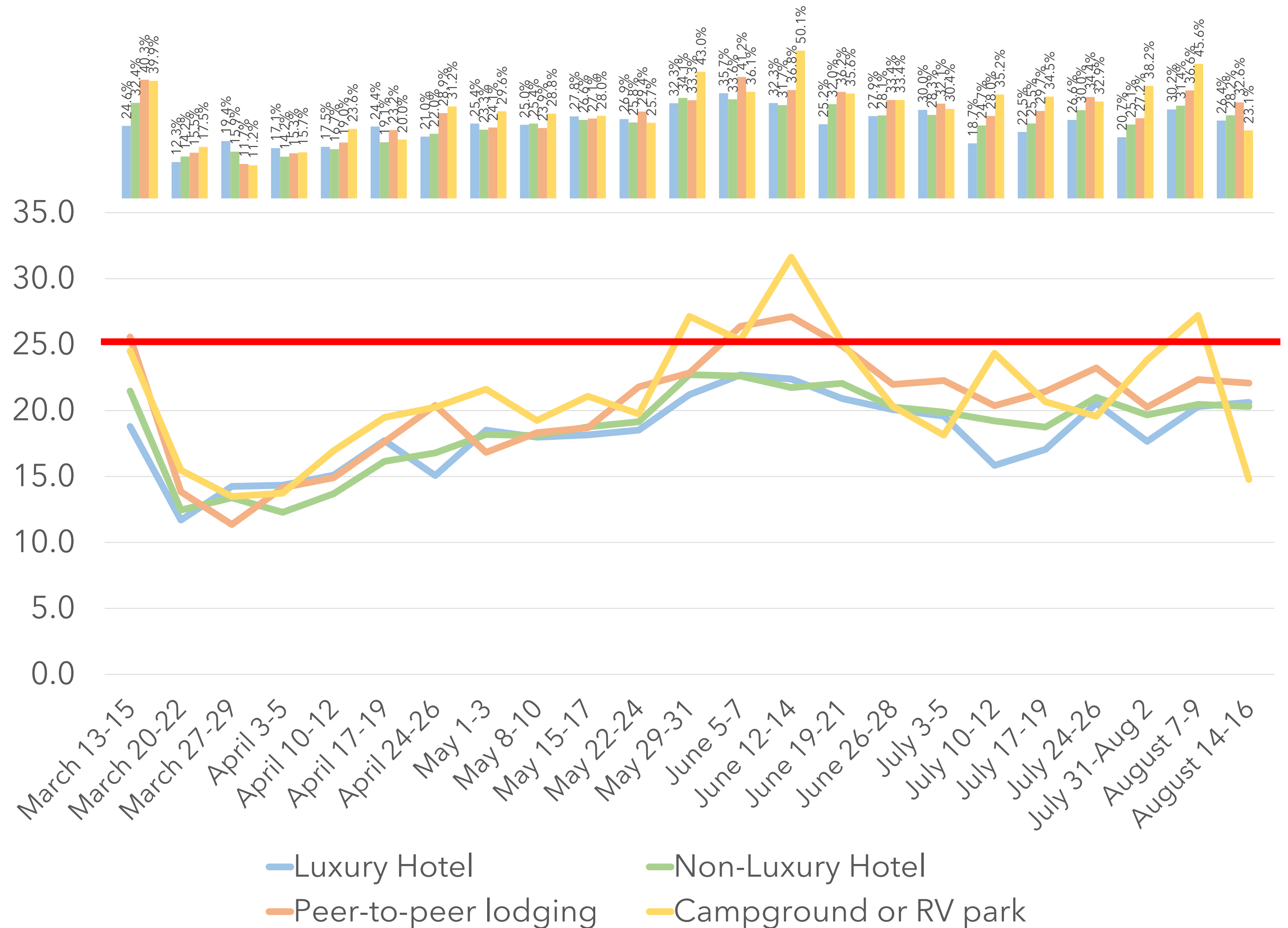




Lodging Preference



Percent Potentially Marketable (Index Above 25)





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

info@destinationanalysts.com



We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

info@destinationanalysts.com

