

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF AUGUST 2nd, 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://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

THANK YOU IN ADVANCE

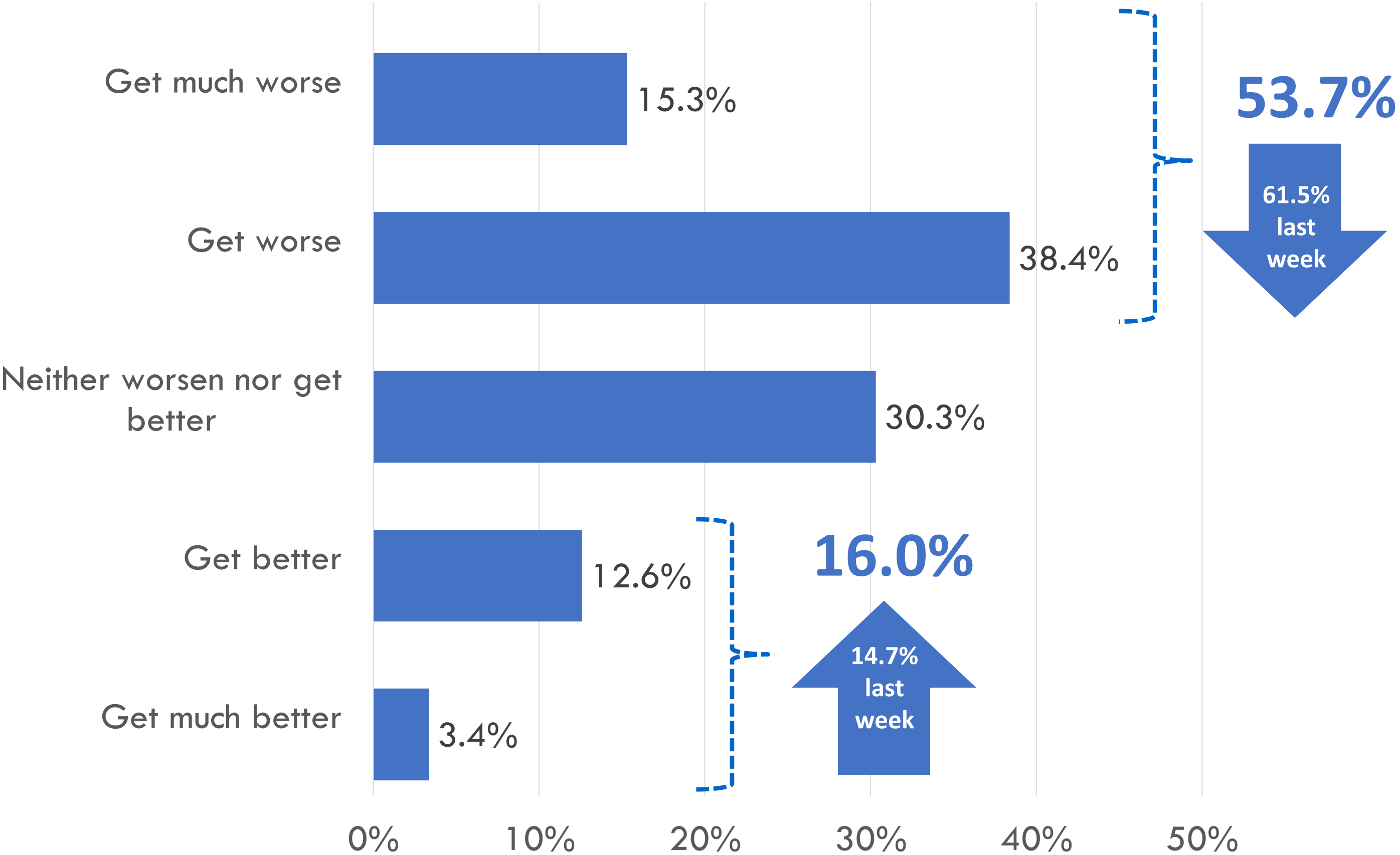
A photograph of three hikers on a dirt trail, viewed from behind. The hiker in the foreground is wearing a grey shirt and black leggings. The middle hiker is wearing a teal shirt and black leggings. The hiker in the background is wearing a blue shirt and shorts. They are walking on a dirt path that curves to the right, surrounded by tall, reddish-brown rock walls. The sky is visible in the distance.

Key Findings for the Week of August 2nd

Please cite Destination Analysts when using or distributing this data

Expectations for the Coronavirus Outbreak

A proportion of Americans shifted from feeling the pandemic would get worse in the next month (53.7% down from 61.5%) to feeling things would be about the same (30.3% from 23.8%). Still, relatively few think things will improve (16.0%).



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 _____

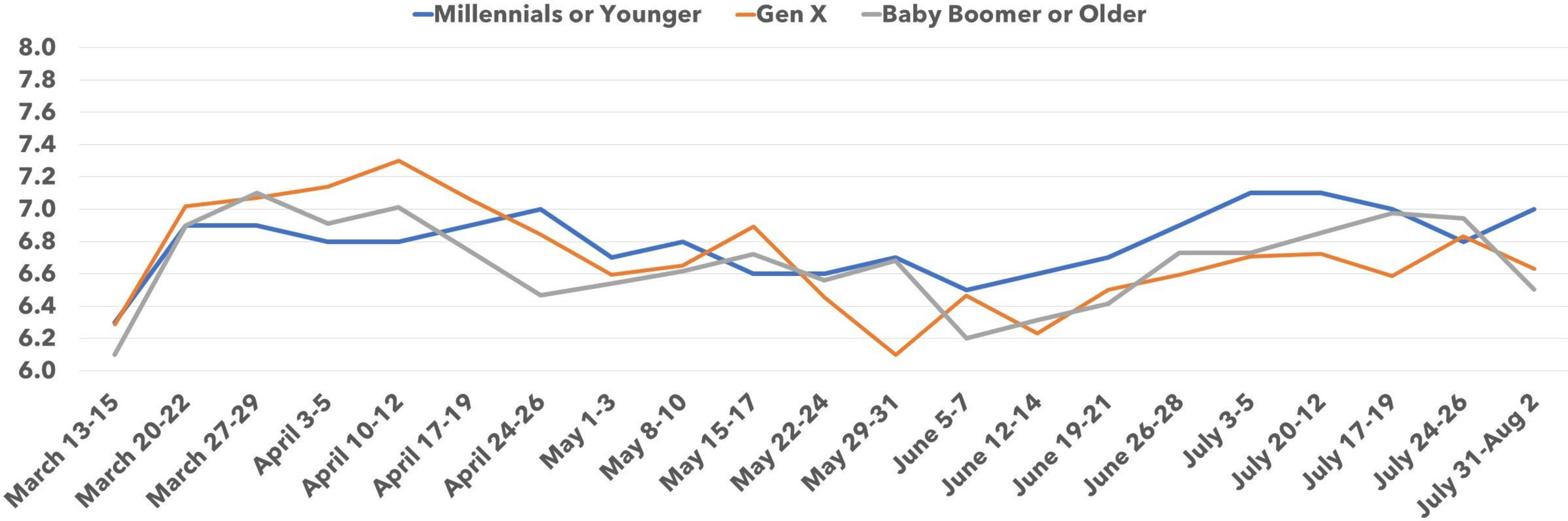
(Base: Wave 21. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)

Personal Health Concerns

With reported cases increasing among younger people, concerns about personally contracting the virus have been elevated among Millennial travelers over the past month.

PERSONAL HEALTH CONCERNS BY GENERATION MARCH—AUGUST 2020

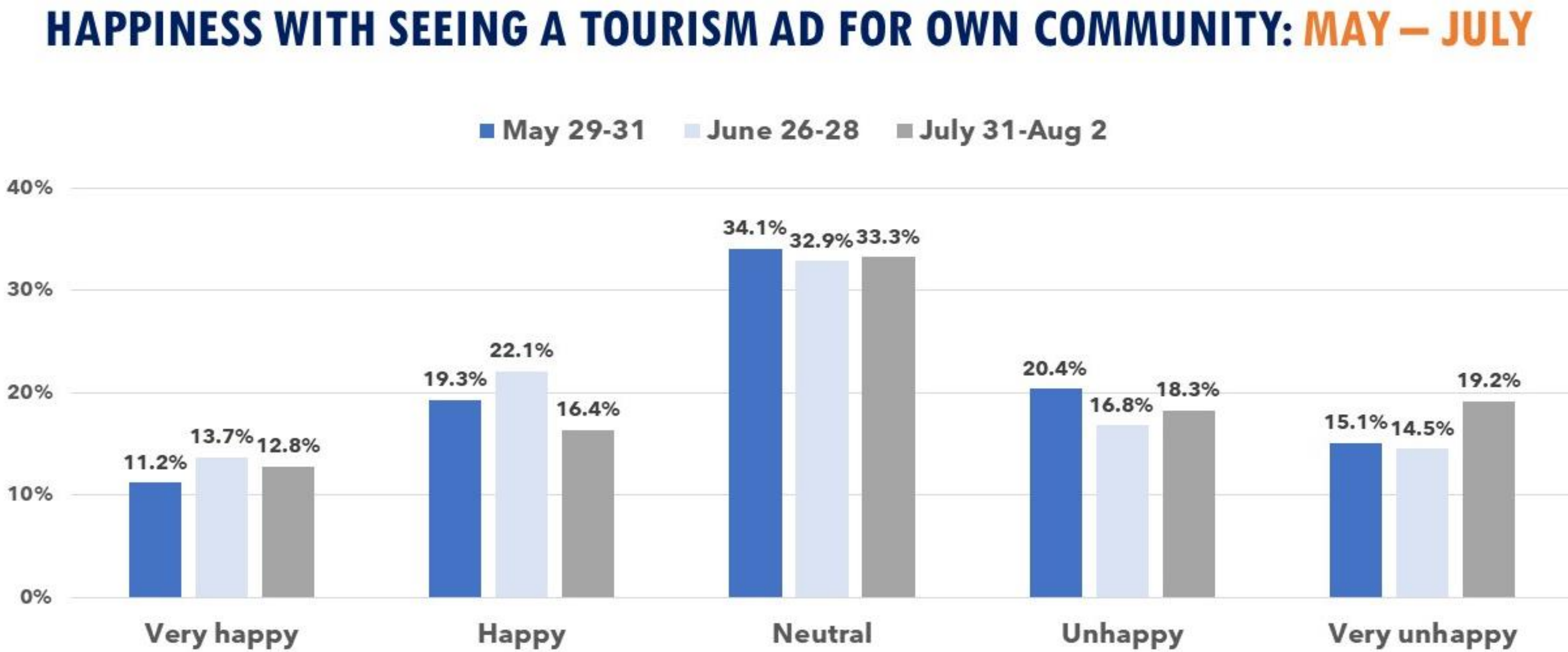
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?



Base: Waves 1-21. 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, 1,213, 1,200, 1,206 and 1,224 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, 10-12, 17-19, 24-26, and July 31-Aug 2, 2020)

Happiness with Seeing a Tourism Ad for Own Community

With these ongoing feelings about the pandemic, the proportion of American travelers that say they would be happy to see an ad promoting their community for tourism when it is safe has receded to 29.1% from 35.8% at the end of June.



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?

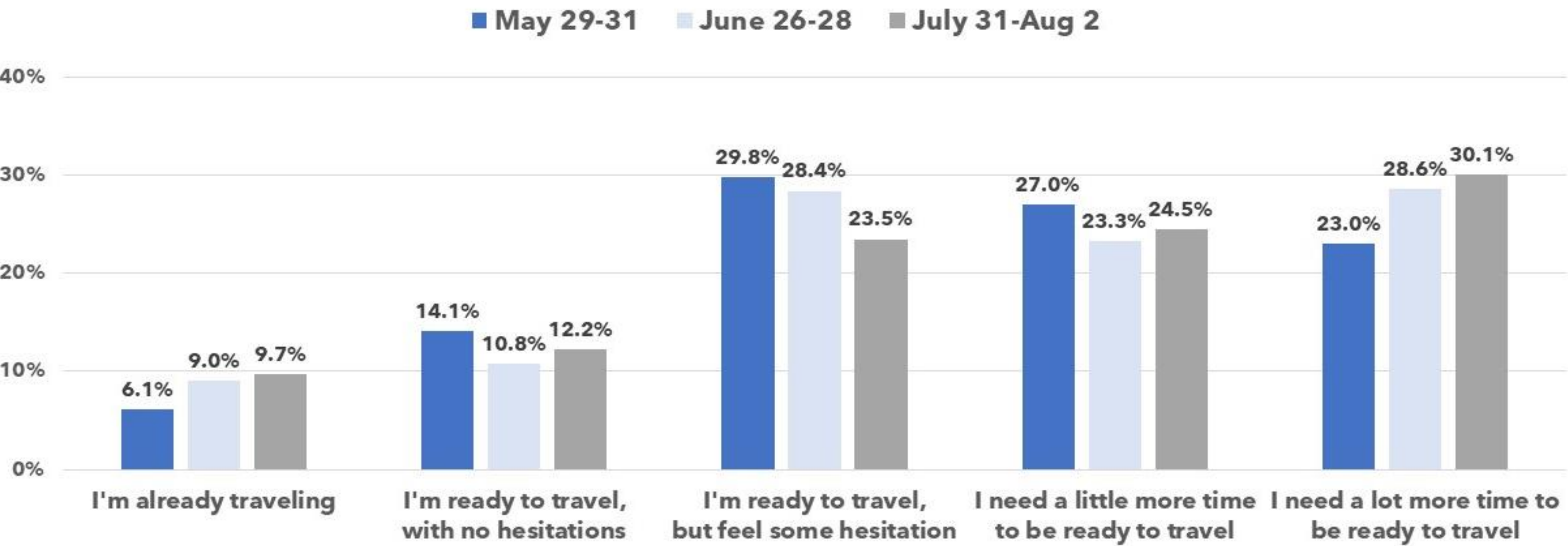
(Base: Waves 12, 16 and 21. All respondents, 1,200, 1,206 and 1,224 completed surveys. Data collected May 29-31, June 26-28 and July 31-Aug 2, 2020)

Travel Readiness State of Mind

American travelers are also more polarized in their travel readiness state of mind, being ready to travel versus not. While 48.5% report having leisure trip plans during one or more months in the remainder of the year, sadly, 51.5% do not currently have any leisure trip plans in 2020.

TRAVEL READINESS STATE OF MIND: MAY – JULY

QUESTION: WHEN IT COMES TO GETTING BACK OUT AND TRAVELING AGAIN, WHICH BEST DESCRIBES YOUR CURRENT STATE OF MIND?

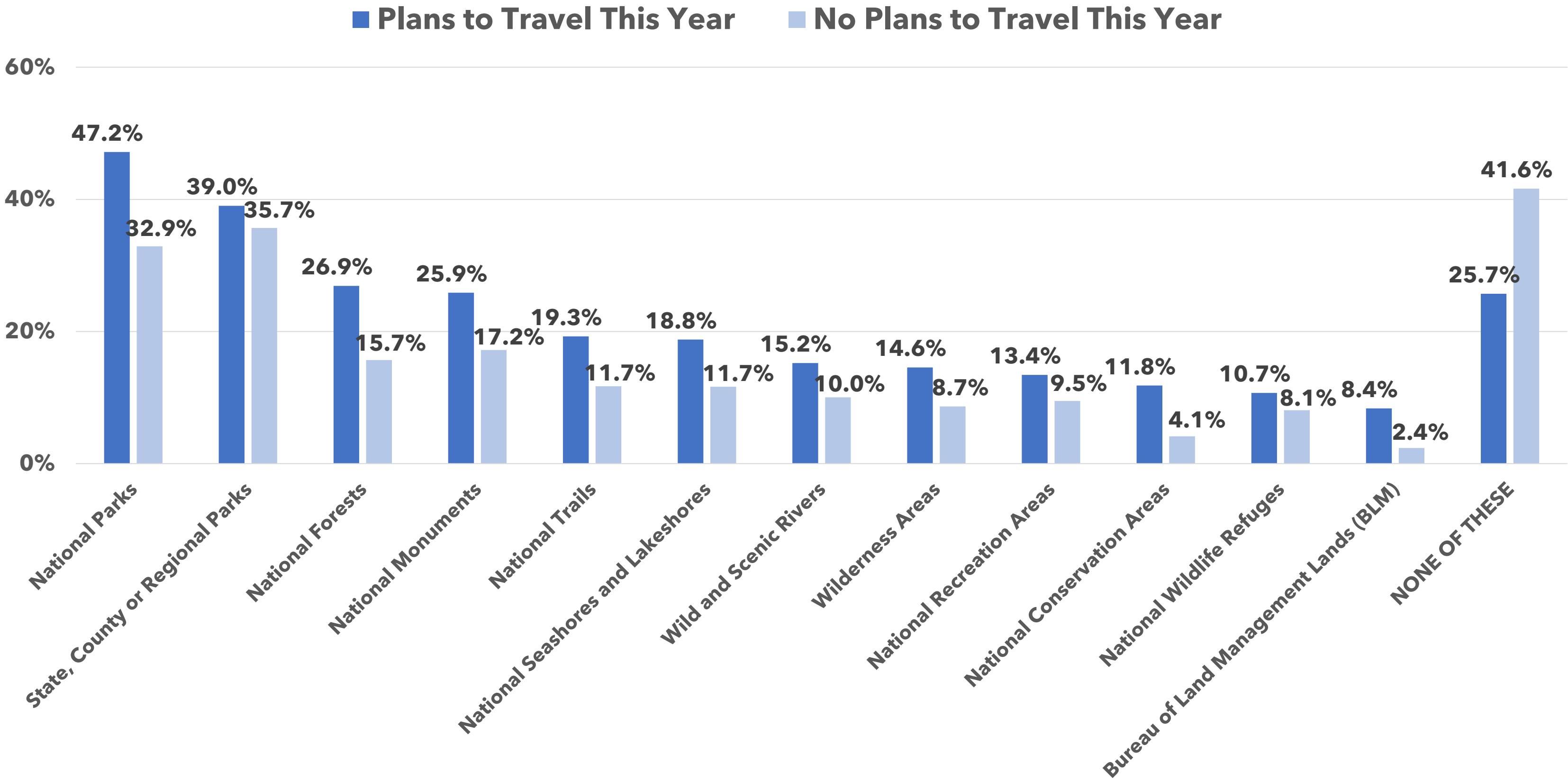


(Base: Waves 12, 16 and 21. All respondents, 1,200, 1,206 and 1,224 completed surveys. Data collected May 29-31, June 26-28 and July 31-Aug 2, 2020)

Those Who Have No Plans to Travel This Year

Those who do not have trip plans this year are, unsurprisingly, more concerned about the virus, and maintaining their safety from it has had a greater impact on their travel plans and their desire to travel. They look to currently be postponing travel to mid 2021. Compared to those who are taking trips this year, they don't travel quite as often (an average of 4 leisure trips per year compared to 5), but are just as likely to be affluent and skew female. Interestingly, they are less likely to be travelers that typically visited National Parks and other types of public lands prior to the pandemic—currently the more popular destinations of choice for the coronavirus period—which perhaps is also impacting their decision not to travel right now.

PUBLIC LANDS VISITED IN THE PAST 2 YEARS



Question: In the PAST TWO (2) YEARS while traveling have you visited any of the following types of public lands? (Select all that apply)

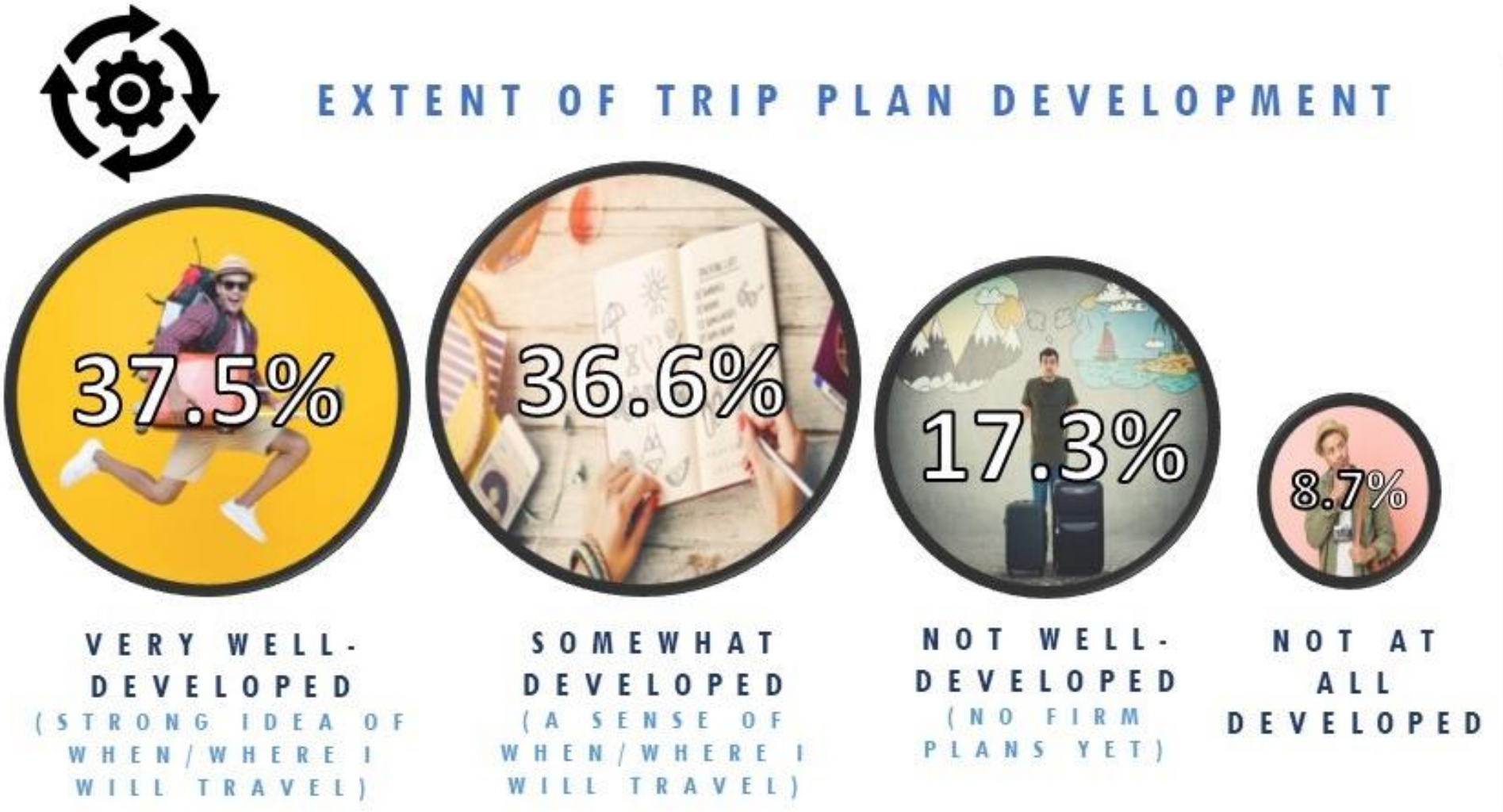
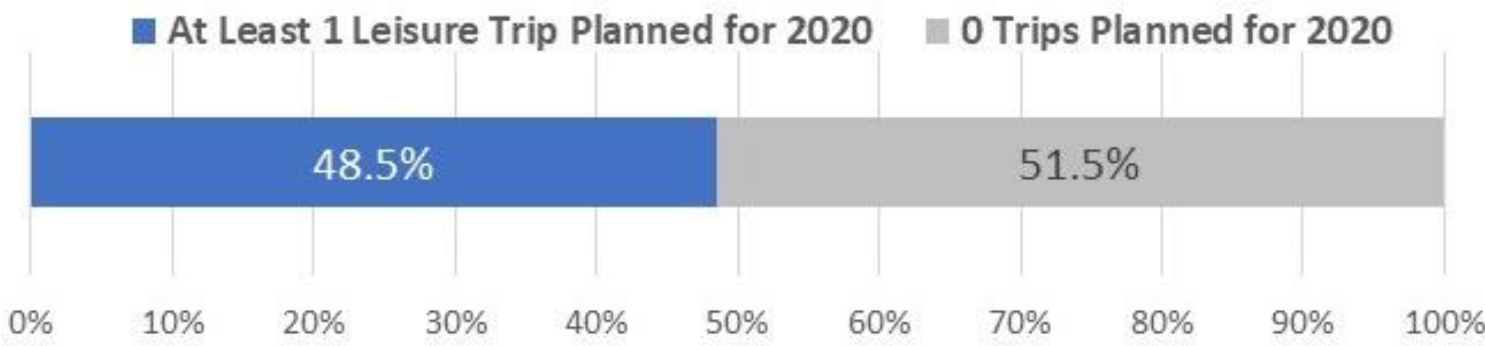
(Base: Wave 21. Respondents who have plans to travel this year and those who don't have plans. 598 and 626 completed surveys.
Data collected July 31-Aug 2, 2020)

American Travelers' Next Leisure Trip

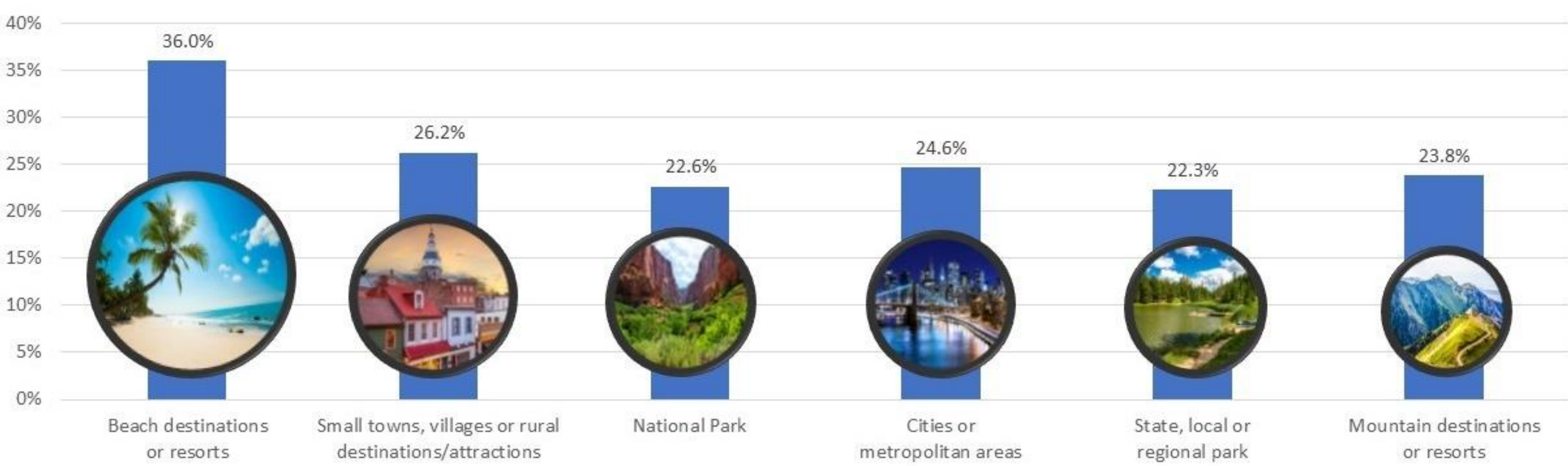
Among those that will be traveling in 2020, plans for their next trip are largely well-formed, with beaches, National Parks and other rural areas most cited as the destinations.

(Base: Wave 21. Respondents who have plans to travel this year, 598 completed surveys. Data collected July 31-Aug 2, 2020)

AMERICAN TRAVELERS' NEXT LEISURE TRIP IN 2020 (AS OF AUGUST 2ND, 2020)



LIKELY TRIP DESTINATIONS



American Travelers' Next Leisure Trip

They also deemed coronavirus-related safety concerns to be important in selecting the destinations they will visit.

(Base: Wave 21. Respondents who have plans to travel this year, 598 completed surveys. Data collected July 31-Aug 2, 2020)

AMERICAN TRAVELERS' NEXT LEISURE TRIP IN 2020 (AS OF AUGUST 2ND, 2020)

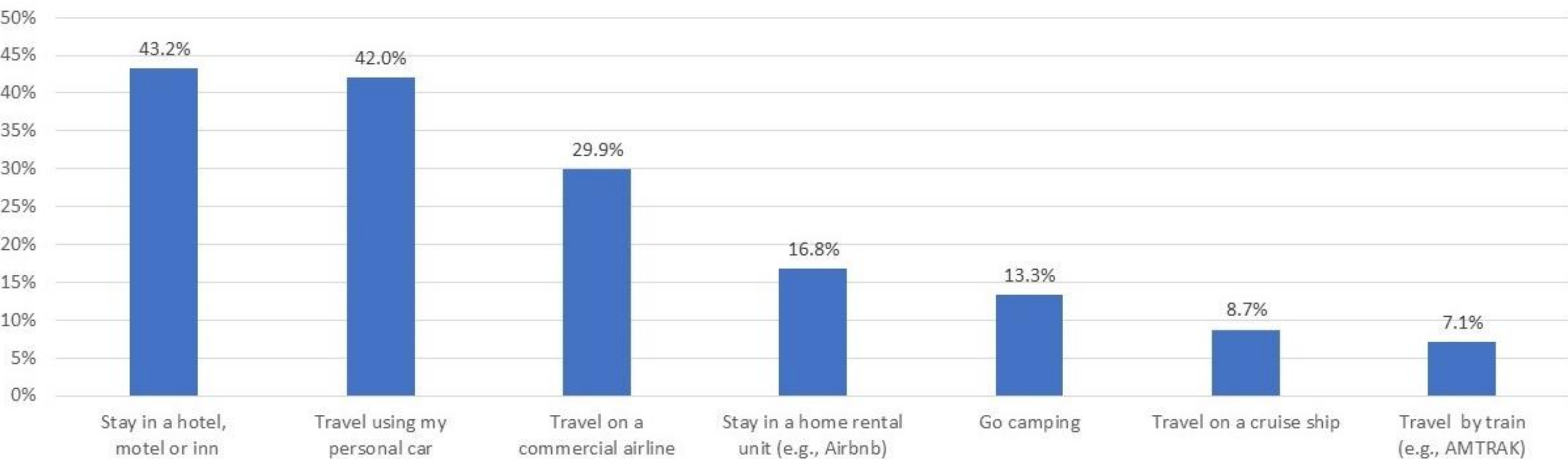
TRIP DETAILS & CONSIDERATIONS



CHANCE OF TRIP CANCELLATION DUE TO CORONAVIRUS SITUATION



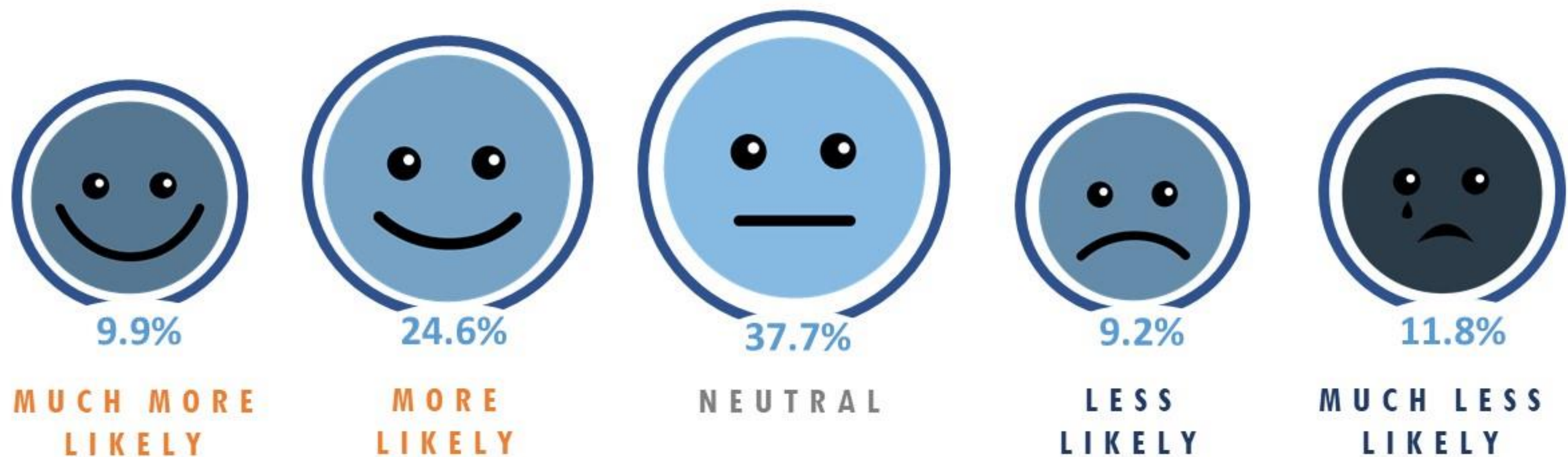
LIKELY TRIP ACCOMODATIONS & TRANSPORTATION



Likelihood to Travel More if Schools Don't Re-Open

One of the segments more likely to have trip plans in 2020 are those with school-age kids. When parents of school-aged kids were asked about their likelihood to take family trips this Fall if their children do not have in-person education, 34.5% of these parents say they are more likely to take such trips; 21% feel less likely.

LIKELIHOOD OF TRAVELING MORE IF SCHOOLS DON'T RE-OPEN FOR IN-PERSON EDUCATION



Question: Imagine that your school(s) DO NOT OPEN for in-person education this Fall. How likely would you be to take more family trips this Fall because you are not tied to a traditional educational schedule? (Select one to fill in the blank)
I would be _____ to take additional family trips if not constrained by a traditional schedule.

(Base: Wave 21. Respondents who have school-age children, 305 completed surveys. Data collected July 31-Aug 2, 2020)



Questions?
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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/>



Coronavirus Travel Sentiment Index

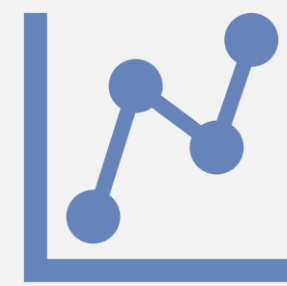
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of August 3rd

What is a Predictive Index?



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



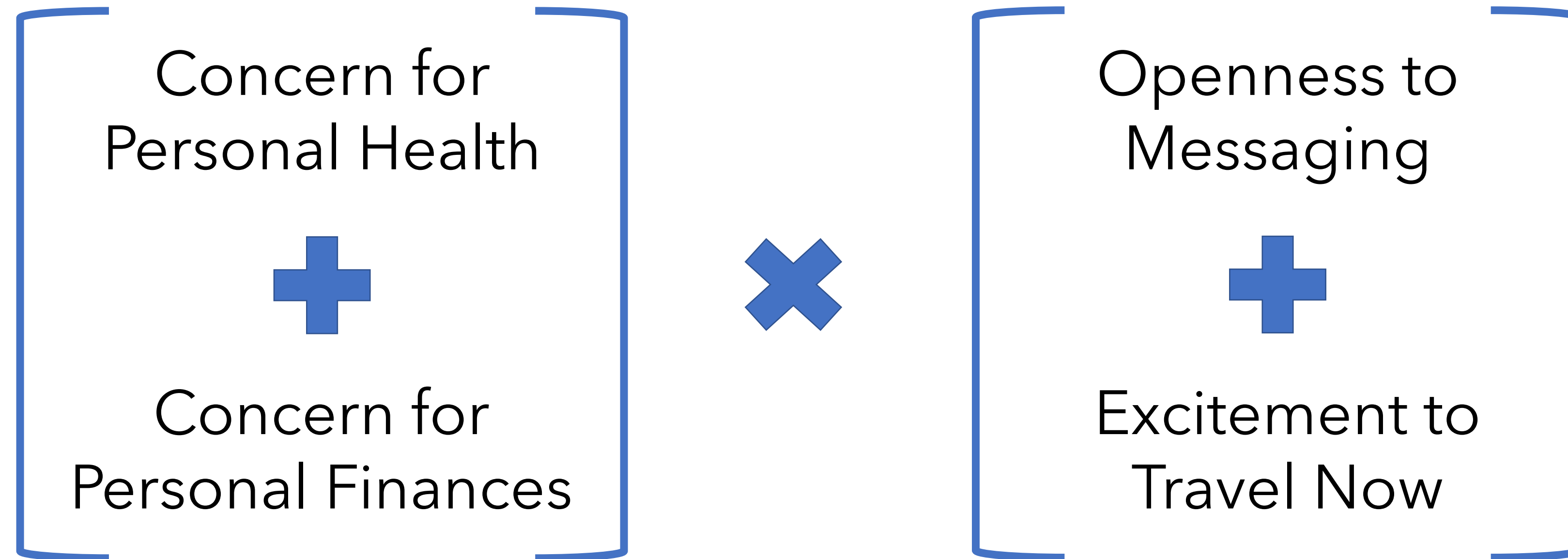
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

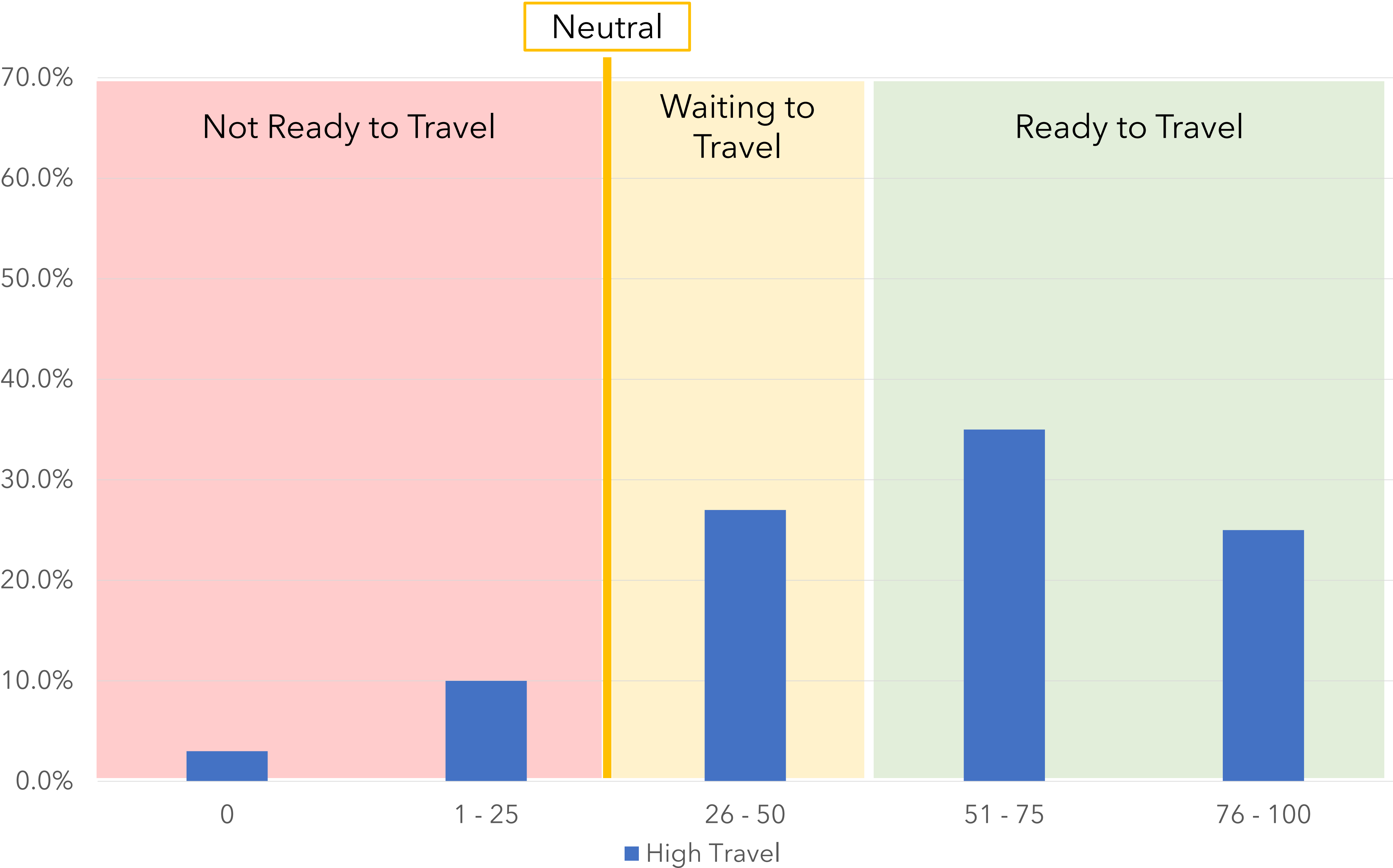
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



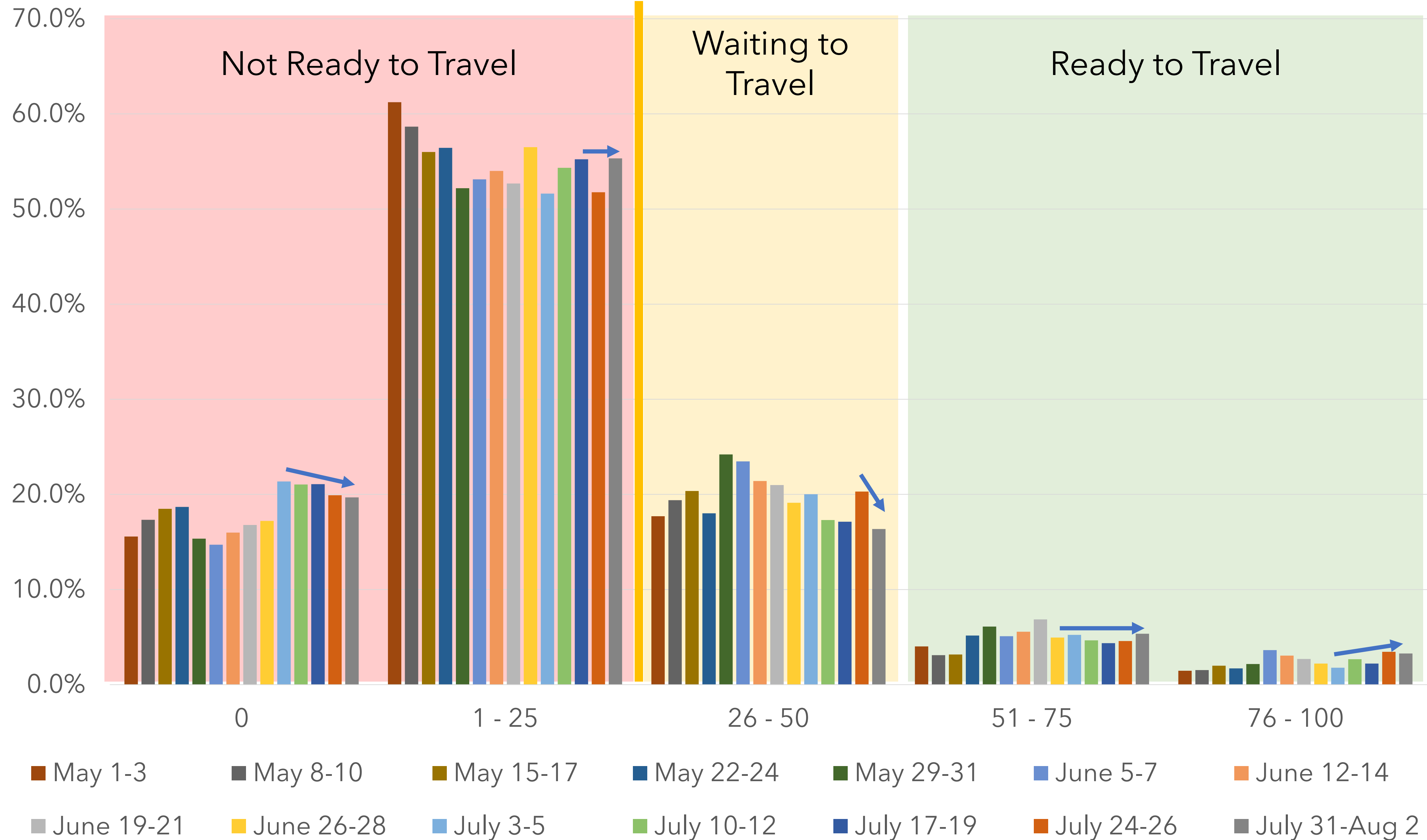
*Normalized to a 100pt scale

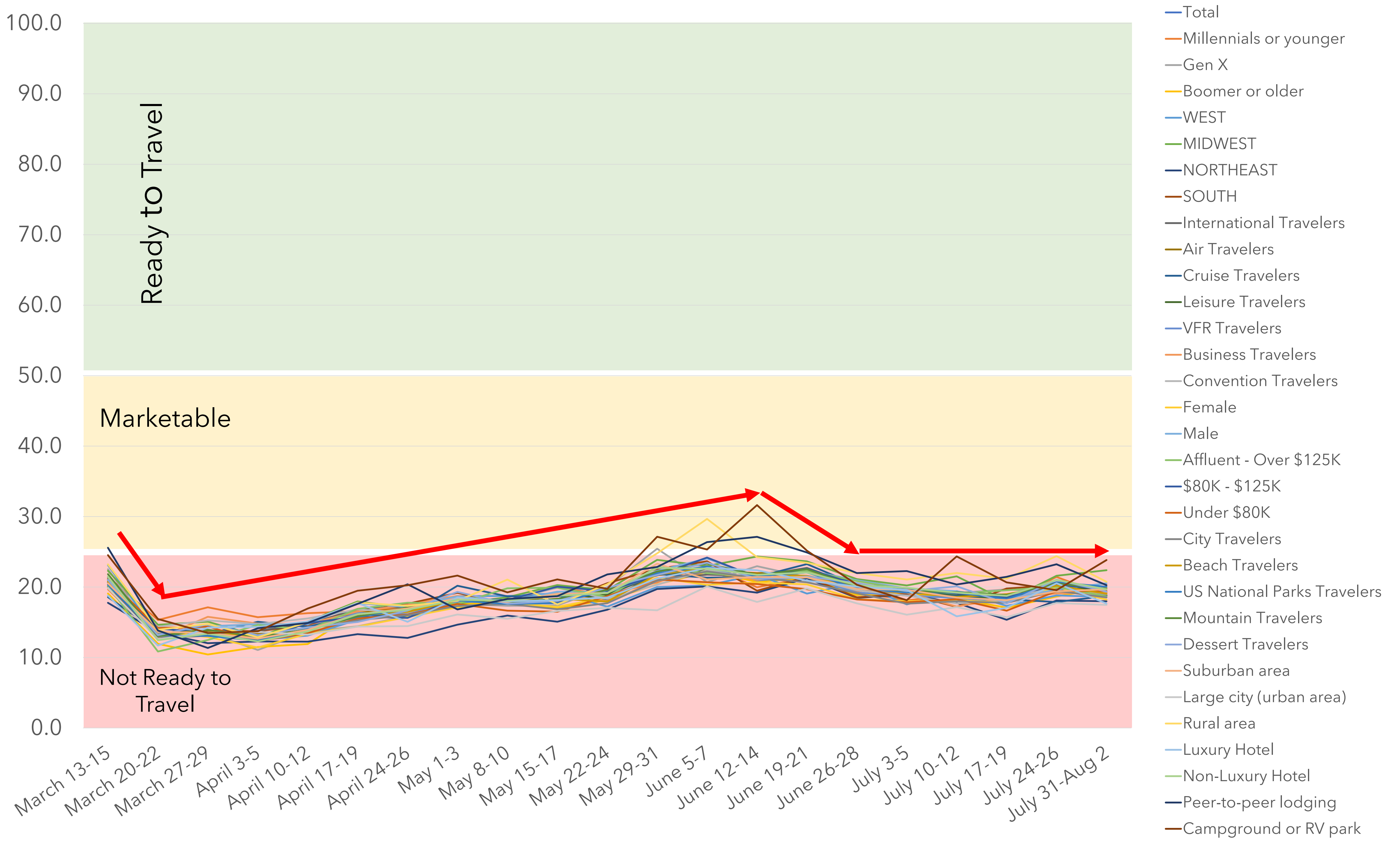
Healthy Travel Outlook



Travel Outlook

Neutral

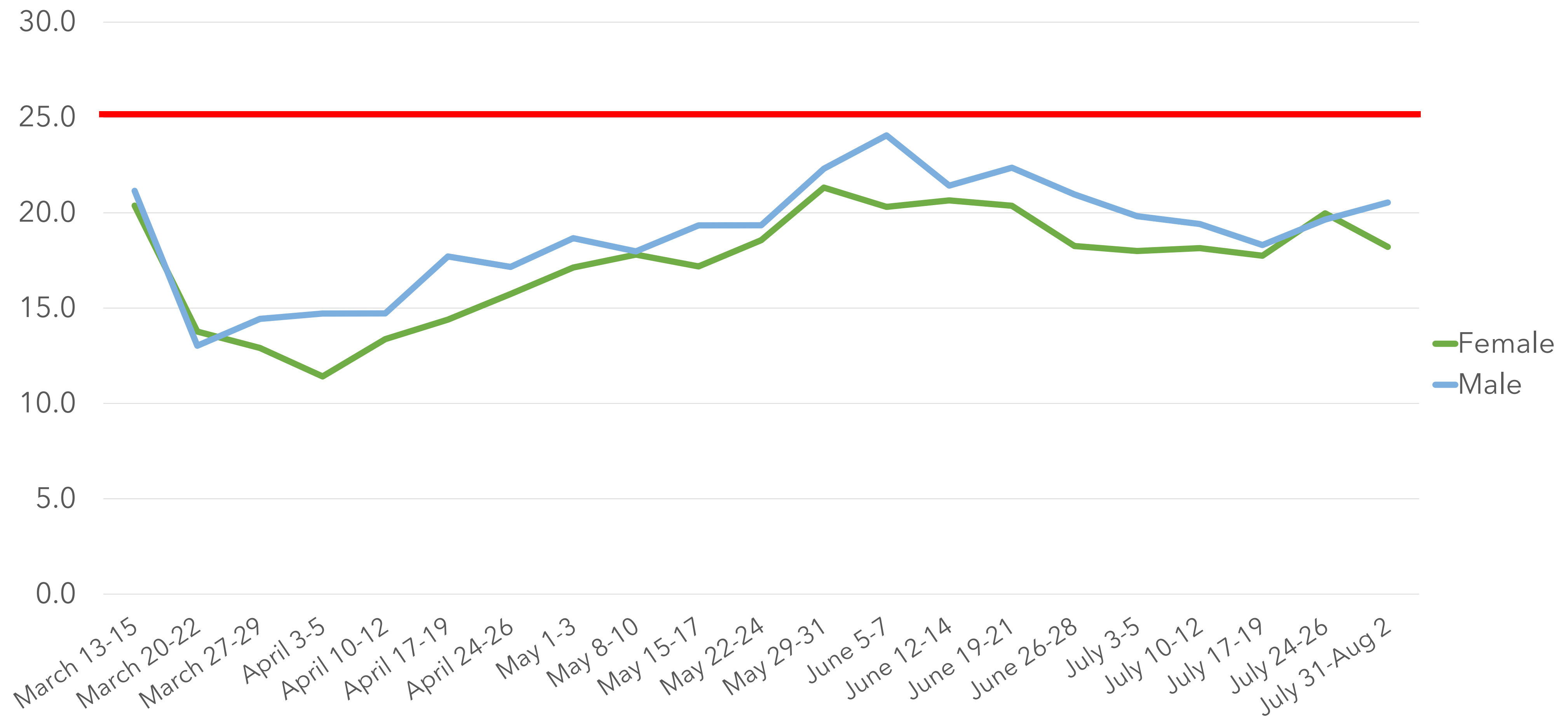




Gender

Points of Interest:

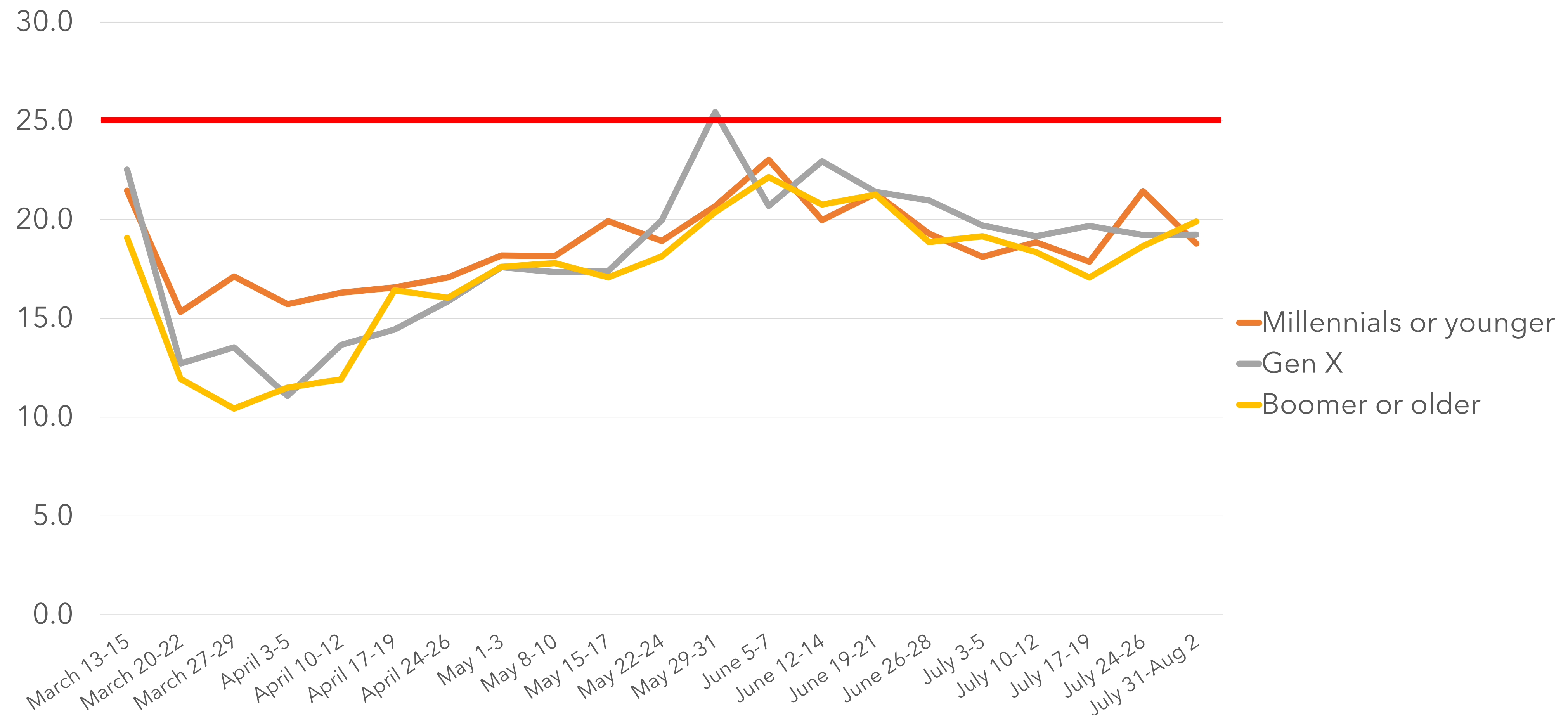
- Men reported increased sentiment this week while sentiment for Women decreased slightly.
- Safety concerns decreased for Men this week.
- This week 54.9 percent of Women reported they have no plans to travel in 2020 (up from 47.2% last week).
- About a quarter of Men this week (24.0%) said they are already traveling or ready to travel with no hesitations.



Generation

Points of Interest:

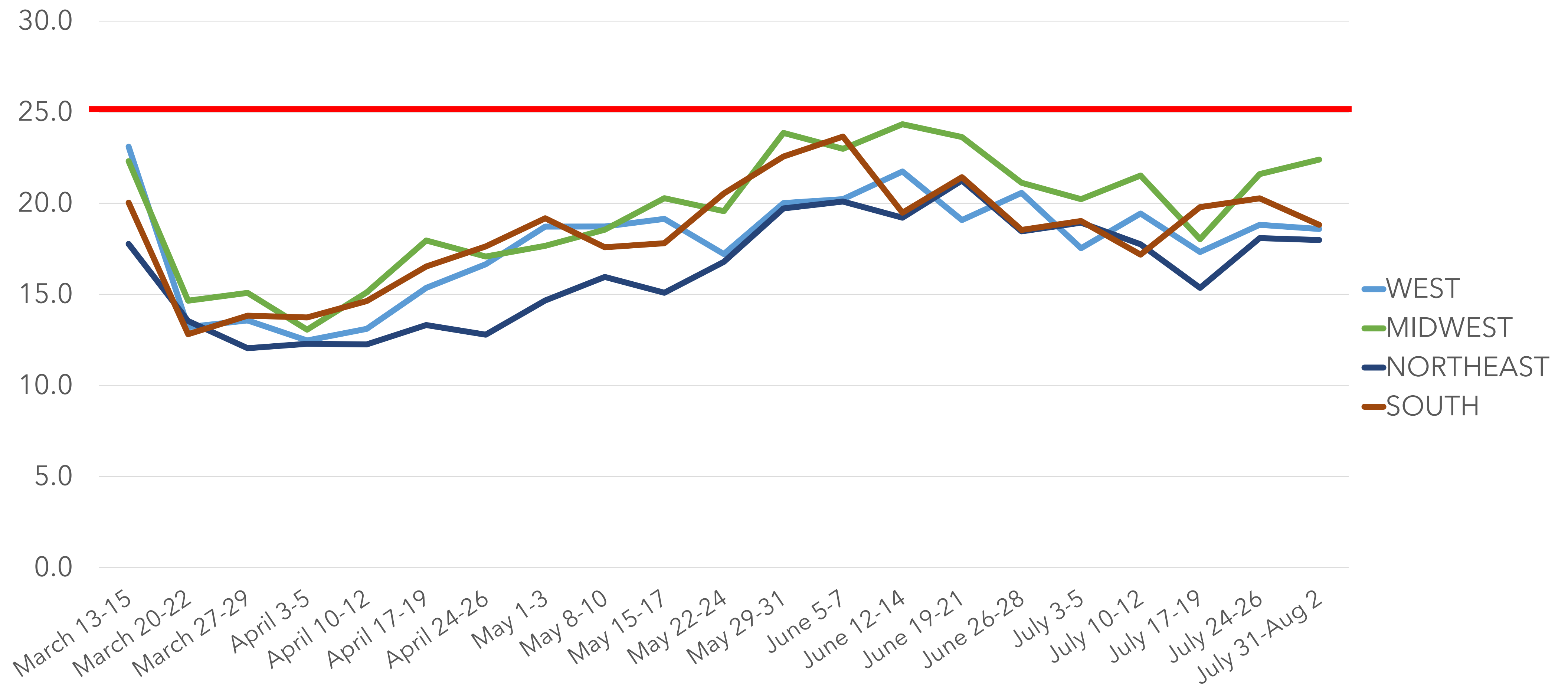
- Boomers showed increased sentiment for two consecutive weeks, in contrast to other generations.
- Boomers showed a decrease in safety concerns again this week.
- Over a third of Millennials (32.7%) reported they would be Happy or Very happy to see an ad promoting their community for travel.



US Region

Points of Interest:

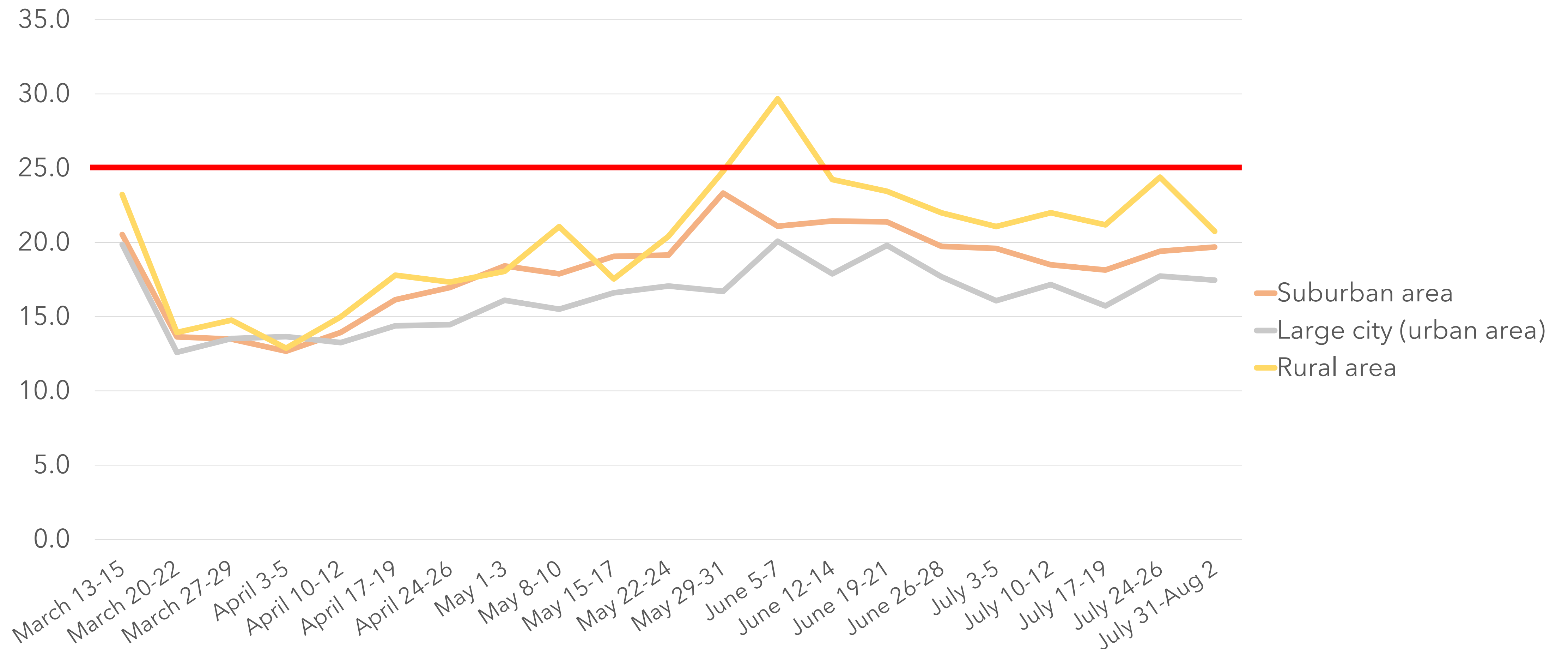
- The Midwest indexed highest amongst US regions this week and is the only region to show any sentiment growth this week.
- The Midwest and West regions showed slight decreases in safety concerns this week.
- The Midwest region showed more excitement for travel and openness for travel messaging again this week than the other US regions.



Type Of Residence

Points of Interest Impacting Index Scores:

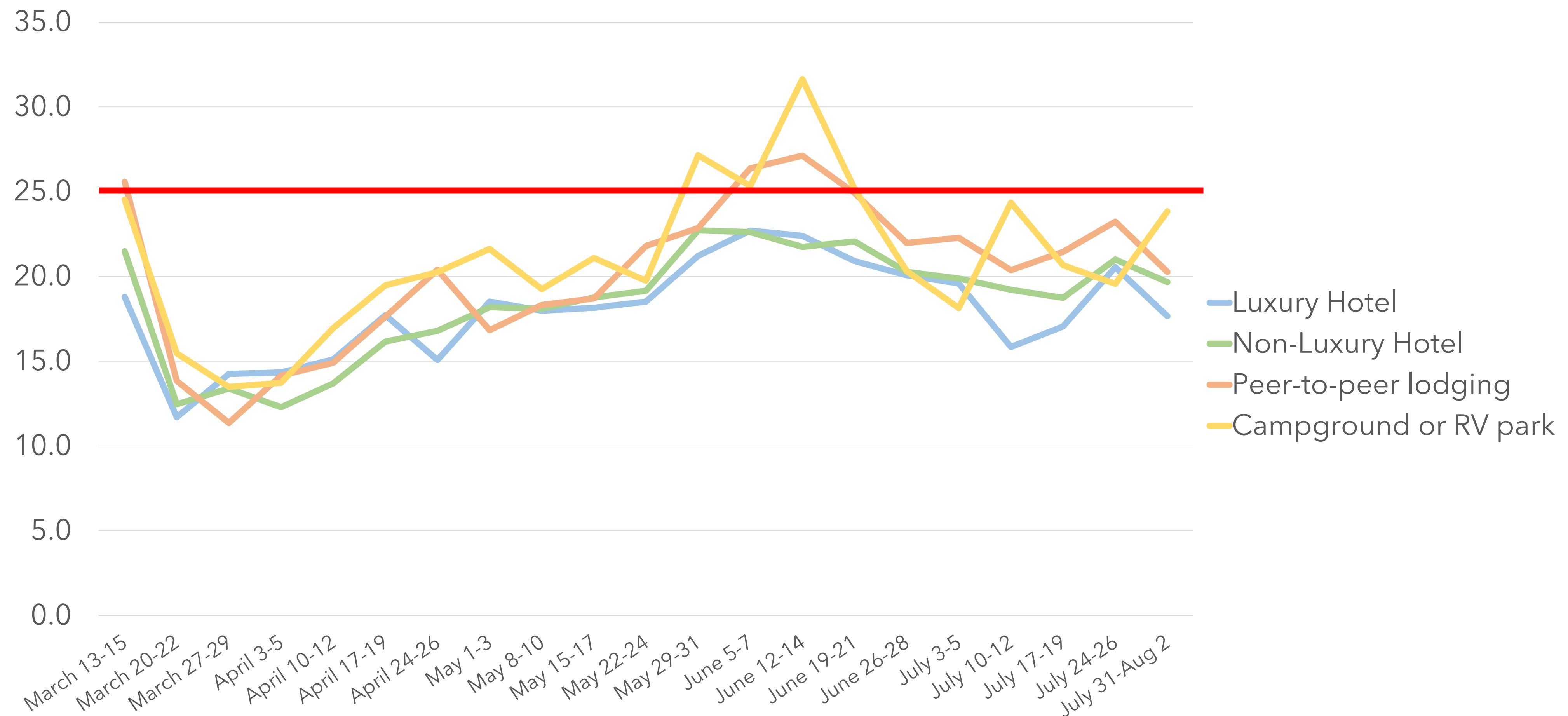
- Rural respondents continue to index higher than their Urban and Suburban counterparts, but at a smaller margin this week.
- Rural respondents reported increased safety concerns this week, while both Urban and Suburban respondents showed decreased levels of safety concern.
- Large city Urban respondents were the most likely to be satisfied by how their communities were behaving during the pandemic.



Lodging Type Used in last 2 years

Points of Interest:

- Campground respondents indexed highest amongst lodging types this week.
- Luxury hotel and Peer-to-Peer lodging respondents reported increased safety concerns this week.
- Luxury hotel and Peer-to-Peer lodging respondents reported the highest levels of happiness if a destination required face masks in public.





Questions?
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- 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/>

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