

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JUNE 15th, 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/>

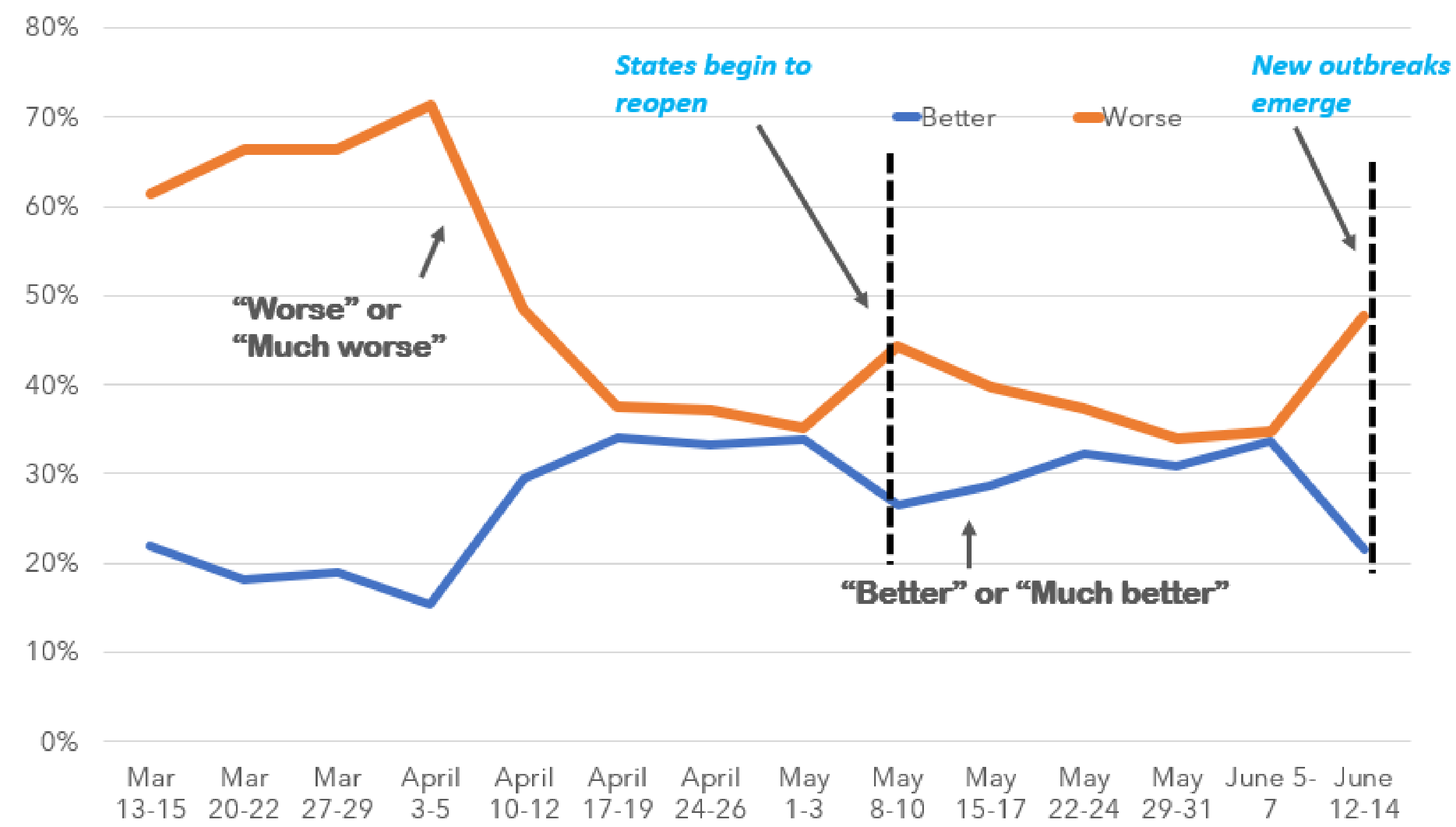
THANK YOU IN ADVANCE

Key Findings for the Week of June 15th

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Expectations for the Coronavirus Outbreak

As a number of coronavirus outbreaks have recently emerged, expectations about the virus’ course in the United States have dampened. The optimism gap has widened again, with more Americans expecting the situation to get worse and fewer expecting it will get better.

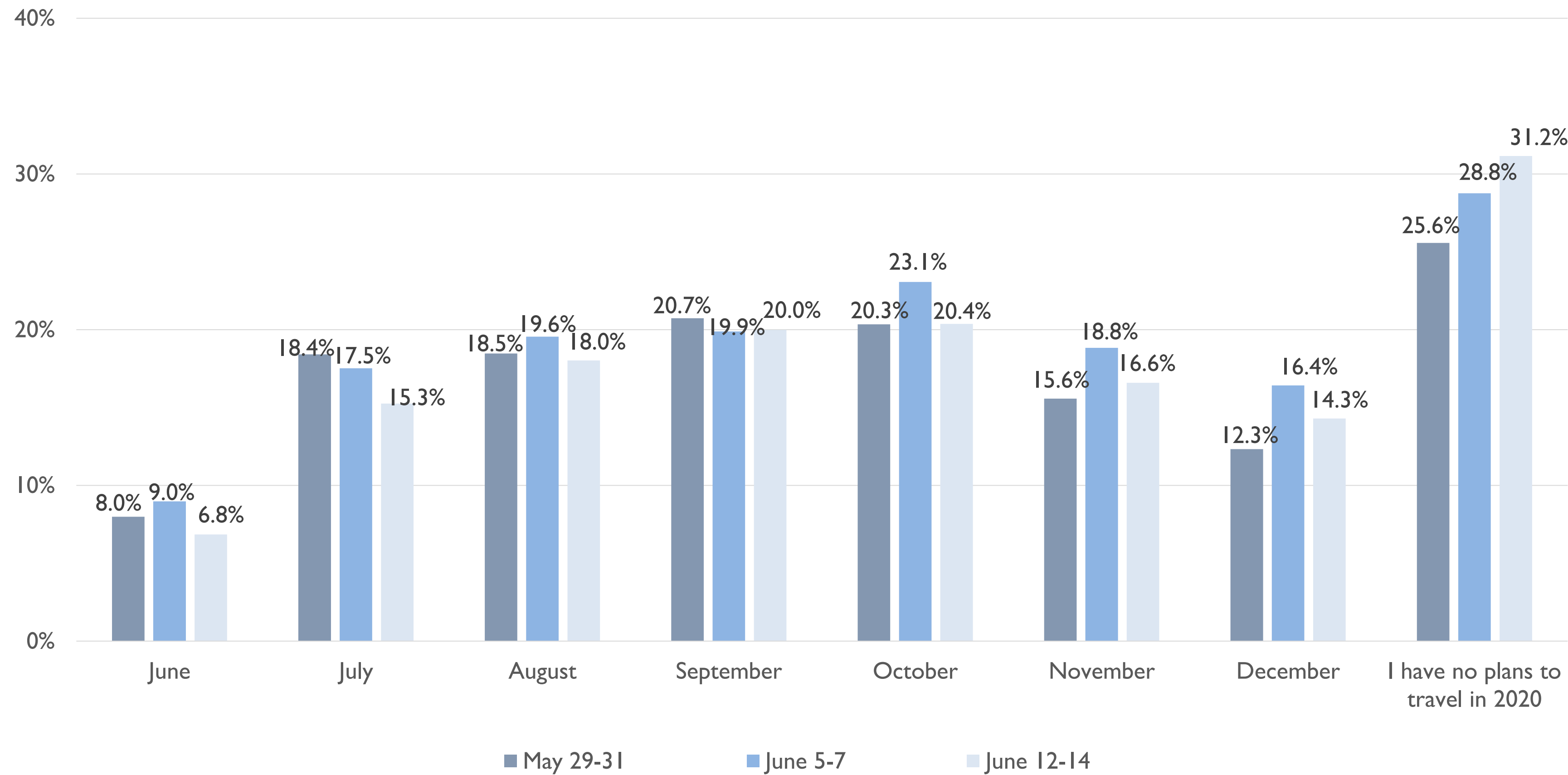


Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?
(Select one) In the next month the coronavirus situation will _____

(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 and 1,214 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 and 12-14, 2020)

Months of Upcoming Travel Plans

Some travelers that thought they would take trips this year have walked that back for now—this week there is an uptick in Americans saying they have no plans to travel in 2020 (although, about 70 percent still say they will take at least one leisure trip this year).

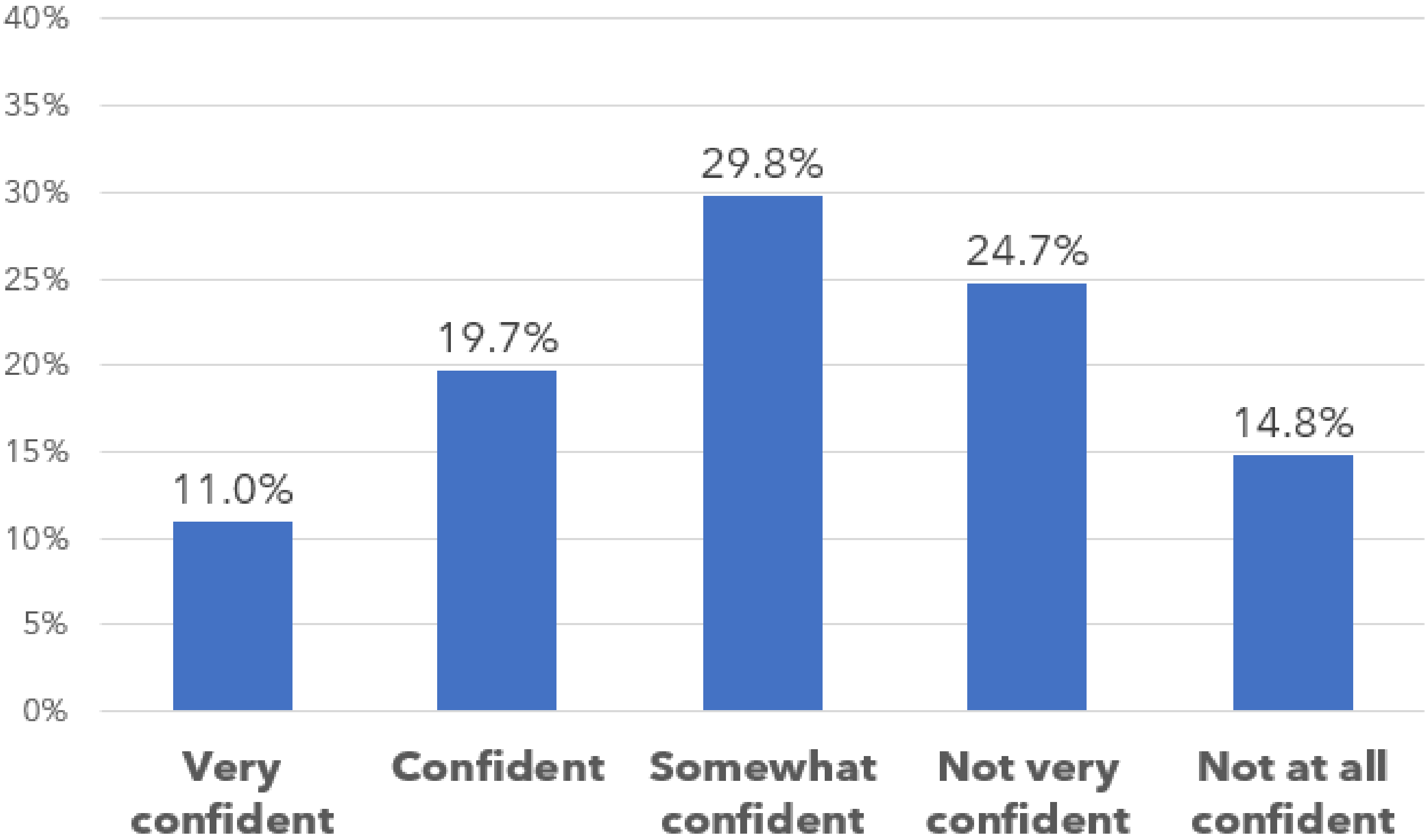


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

(Base: Waves 12-14. 1,257, 1,214 and 1,214 completed surveys. Data collected May 29-31, June 5-7 and 12-14, 2020)

Confidence in Traveling Safely

The majority of American travelers feel they are informed about potential Coronavirus-related risks involved with traveling. Heightened feelings of being informed are correlated to increased travel confidence. Still, some 4 in 10 American travelers remain lacking in confidence that they can travel safely in the current environment.



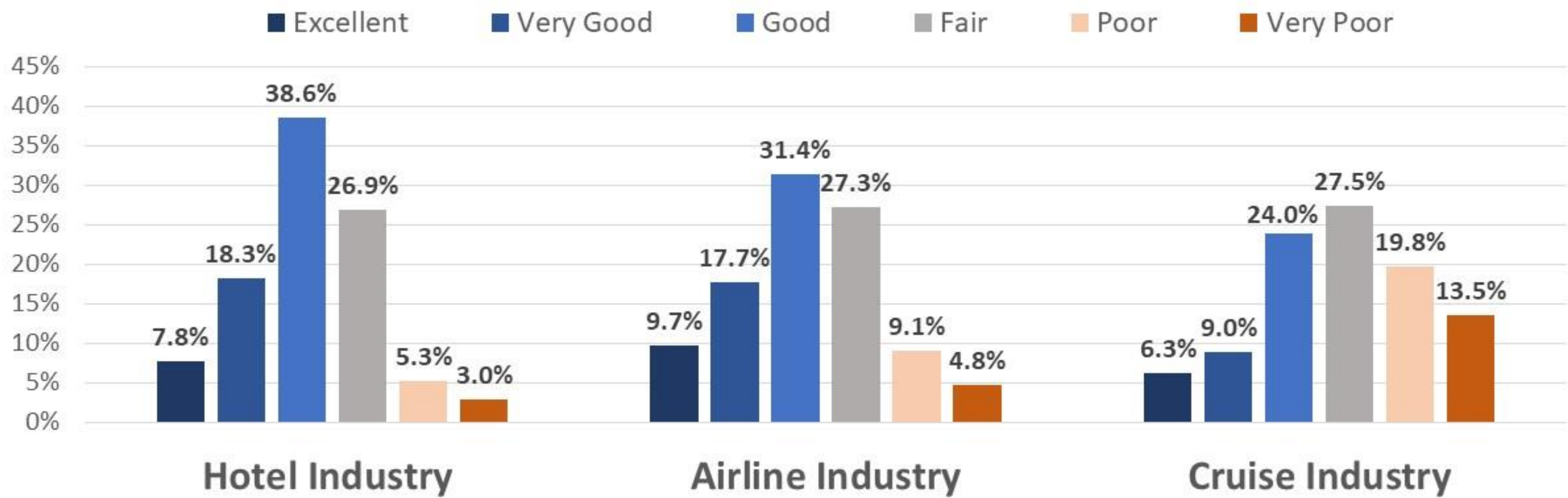
Question: How confident are you that you could travel safely in the current environment?

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

Rating of Travel Industry Communications

How do traveling consumers currently rate the travel industry’s performance in communicating measures they have taken to keep travelers safe from this coronavirus? While it is understood that the hotel, airline and cruise industries don’t necessarily speak in collective voices, overall the hotel industry is seen as generally doing a good job communicating, and a majority also rate the airline industry highly. The cruise industry appears to need more widespread communication about their evolving health and safety practices. Those travelers who demonstrate high degrees of travel readiness rate the communication of the travel industry much better.

AMERICAN TRAVELERS’ RATING OF TRAVEL INDUSTRY COMMUNICATIONS ON CORONAVIRUS PROTECTIONS



Q: PLEASE RATE THE OVERALL PERFORMANCE OF THE HOTEL INDUSTRY / AIRLINE INDUSTRY / CRUISE INDUSTRY IN COMMUNICATING MEASURES THEY HAVE TAKEN TO KEEP TRAVELERS SAFE FROM THE CORONAVIRUS.



(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

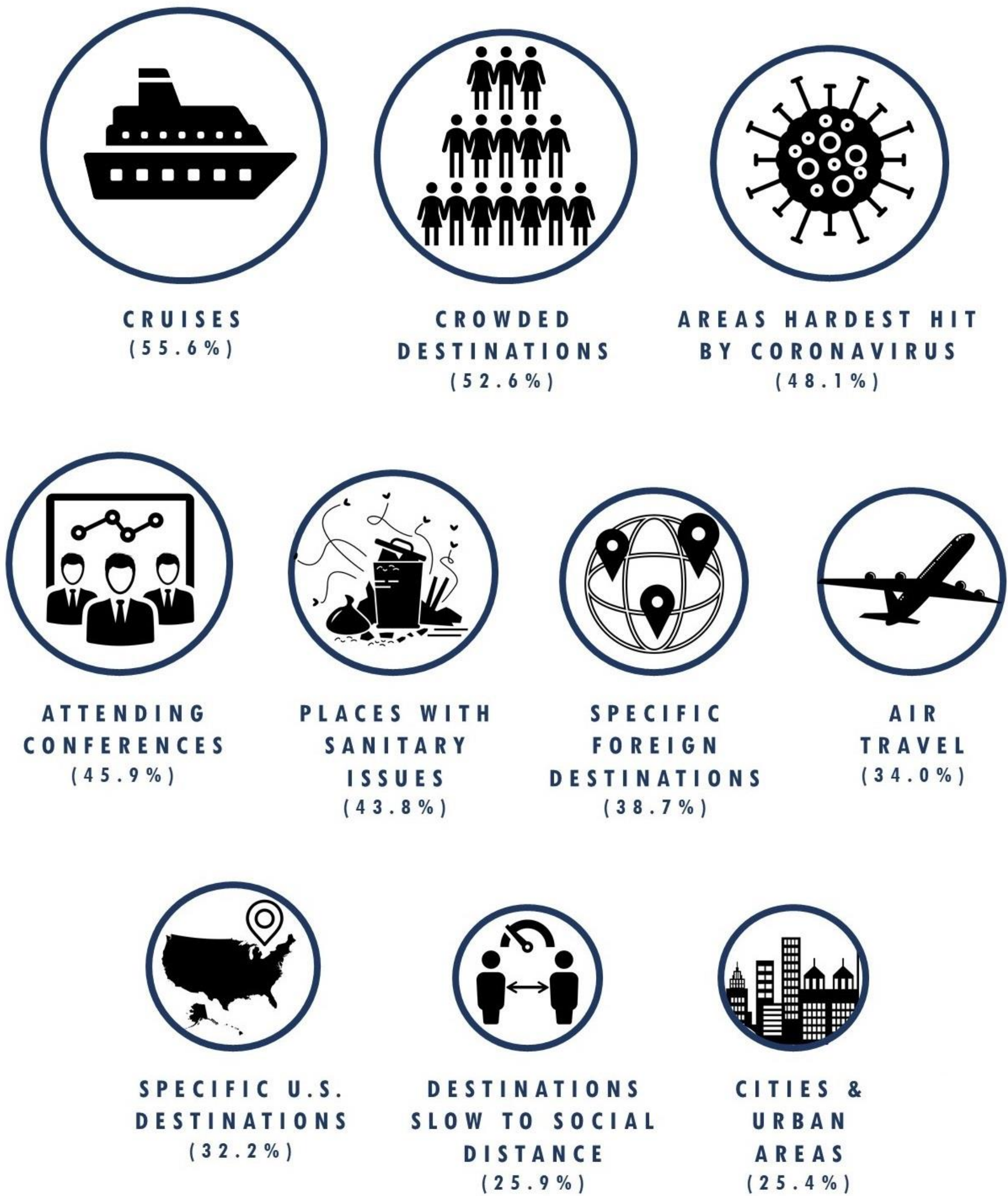
Travel Activities to Avoid Post Coronavirus

In terms of the deeper impact of the COVID-19 pandemic on travel behaviors—at least in the near-term—a majority of Americans who will be traveling in 2020 say they will avoid cruises and crowded destinations.

Question: Do you expect that you will avoid any of the following in the SIX (6) MONTH period immediately after the coronavirus situation is resolved?

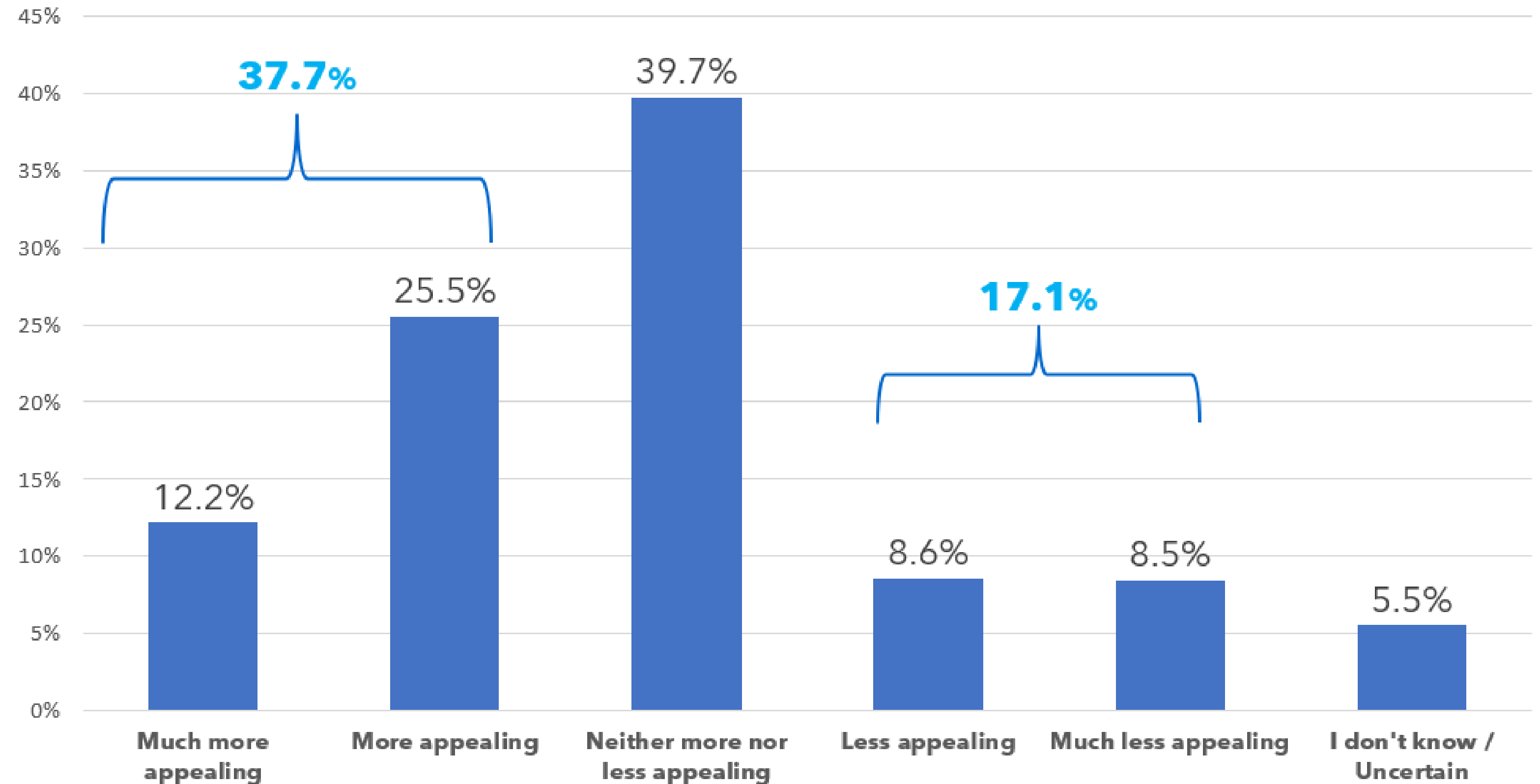
(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

THE PANDEMIC'S INFLUENCE ON TRAVEL: WHAT AMERICANS SAY THEY WILL AVOID WHEN TRAVELING THIS YEAR



The Appeal of New Destinations in the Time of Covid-19

In addition, many travelers are feeling drawn to destinations they are familiar with, rather than the siren of exploration. Over 60 percent said it was likely that the primary destination of their next leisure trip is one they have visited before. When asked about their interest in visiting destinations for the first time versus destinations they are familiar with, 37.7 percent reported that, in the current environment, destinations they are familiar with are more—or much more—appealing.

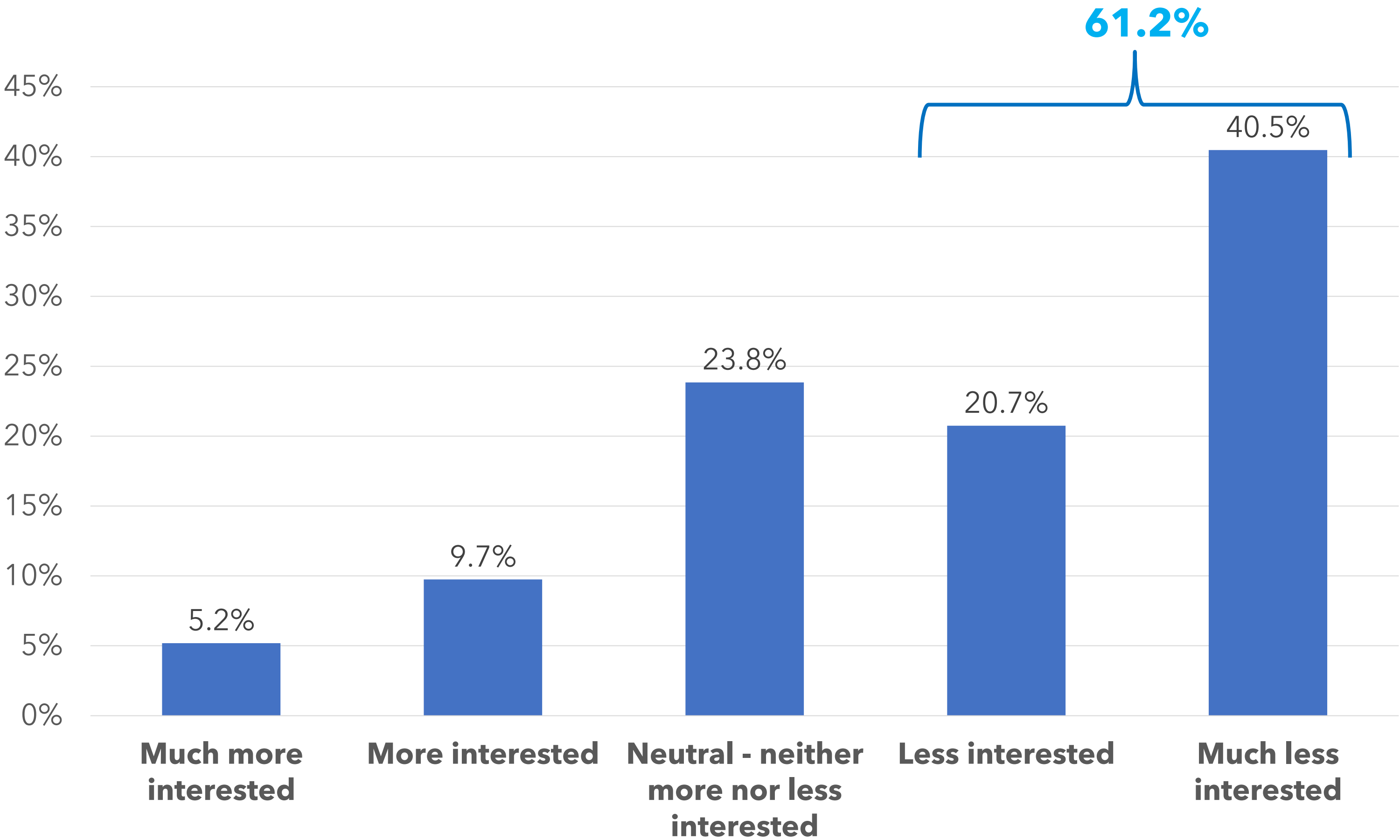


Question: Please think about your interest in visiting destinations for the first time versus destinations you are familiar with (because you previously visited). In the current environment, destinations I am familiar with are _____

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)

Effect of Crowding on Interest in Visitation

Finally, poor “pandemic etiquette” behavior by others—and a perceived lack of official control over tempering that behavior—which is then outed in media will indeed adversely affect the desirability of and aspiration for travel destinations. When asked to think of a destination they are interested in visiting, then imagine if they saw media coverage of that destination being crowded or people not maintaining appropriate distance from each other, and then asked how that would affect their interest in visiting, 61.2 percent of American travelers said it would consequently make them less or much less interested in visiting that destination. This week, two-thirds of American travelers report seeing such kinds of coverage in the media.



Question: Think of a destination you are interested in visiting. If you saw media coverage of that destination being crowded or where people were not maintaining appropriate distance from each other, how would it affect your interest in visiting? (Fill in the blank). I would be _____ in visiting.

(Base: All respondents, 1,214 completed surveys. Data collected June 12-14, 2020)



Coronavirus Travel Sentiment Index

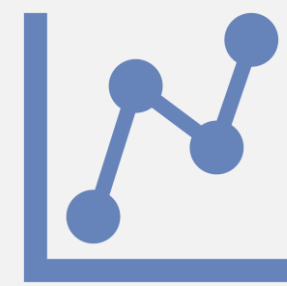
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 15th

What is a Predictive Index?



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



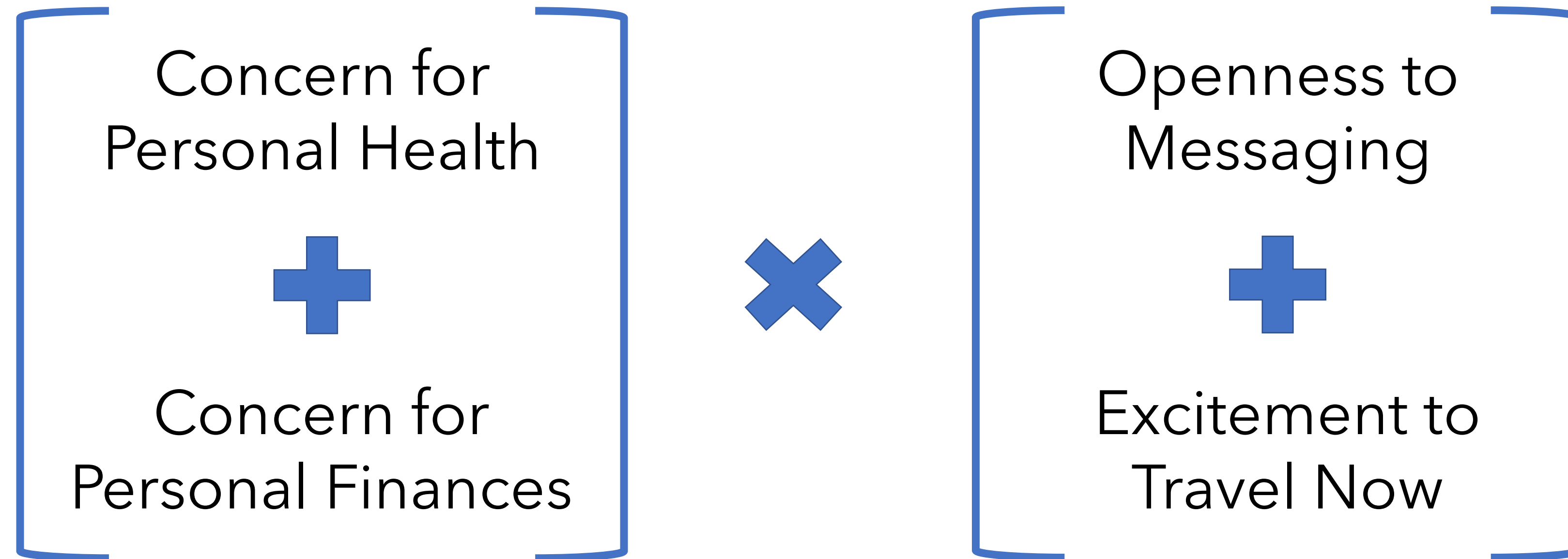
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

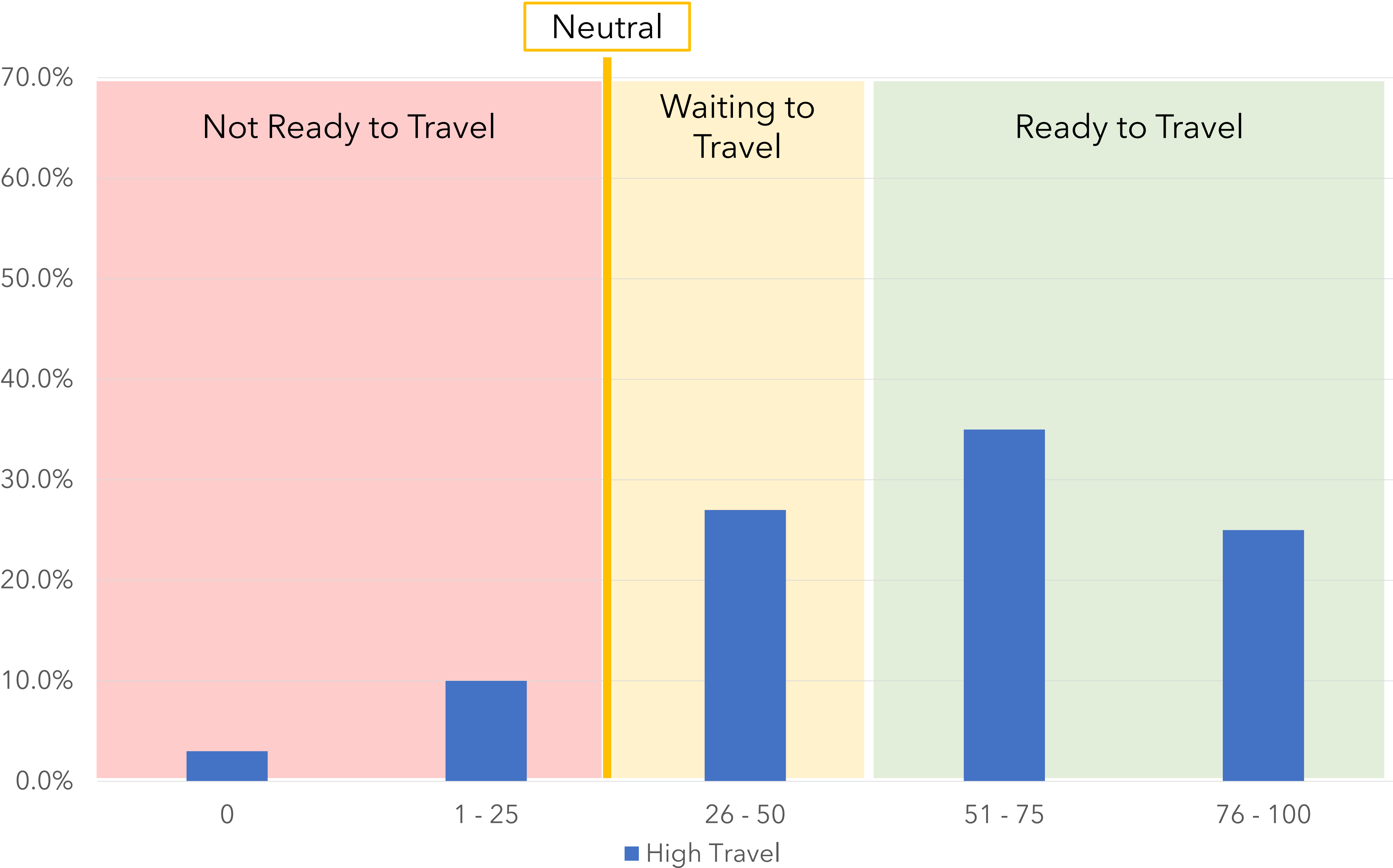
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



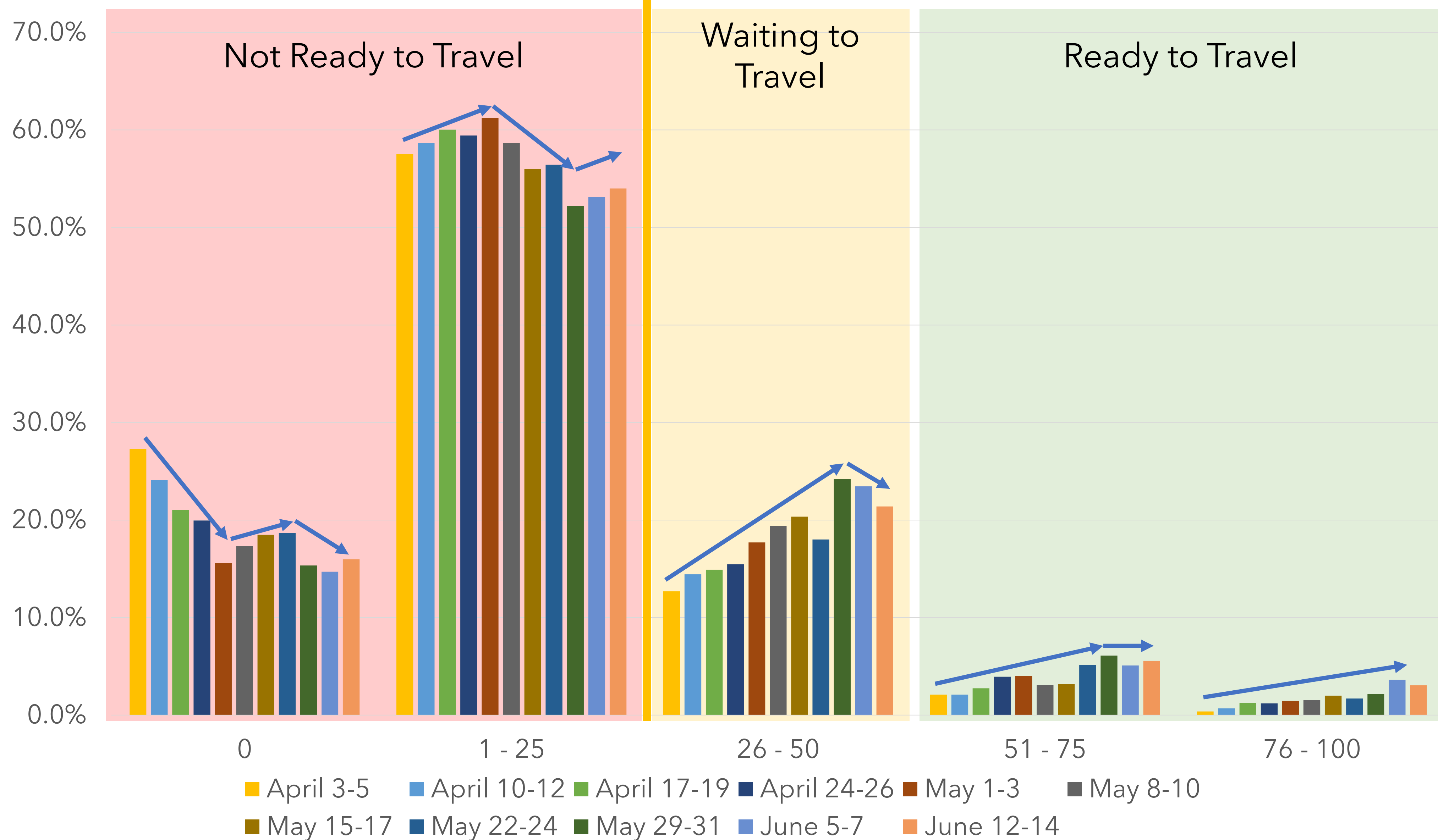
*Normalized to a 100pt scale

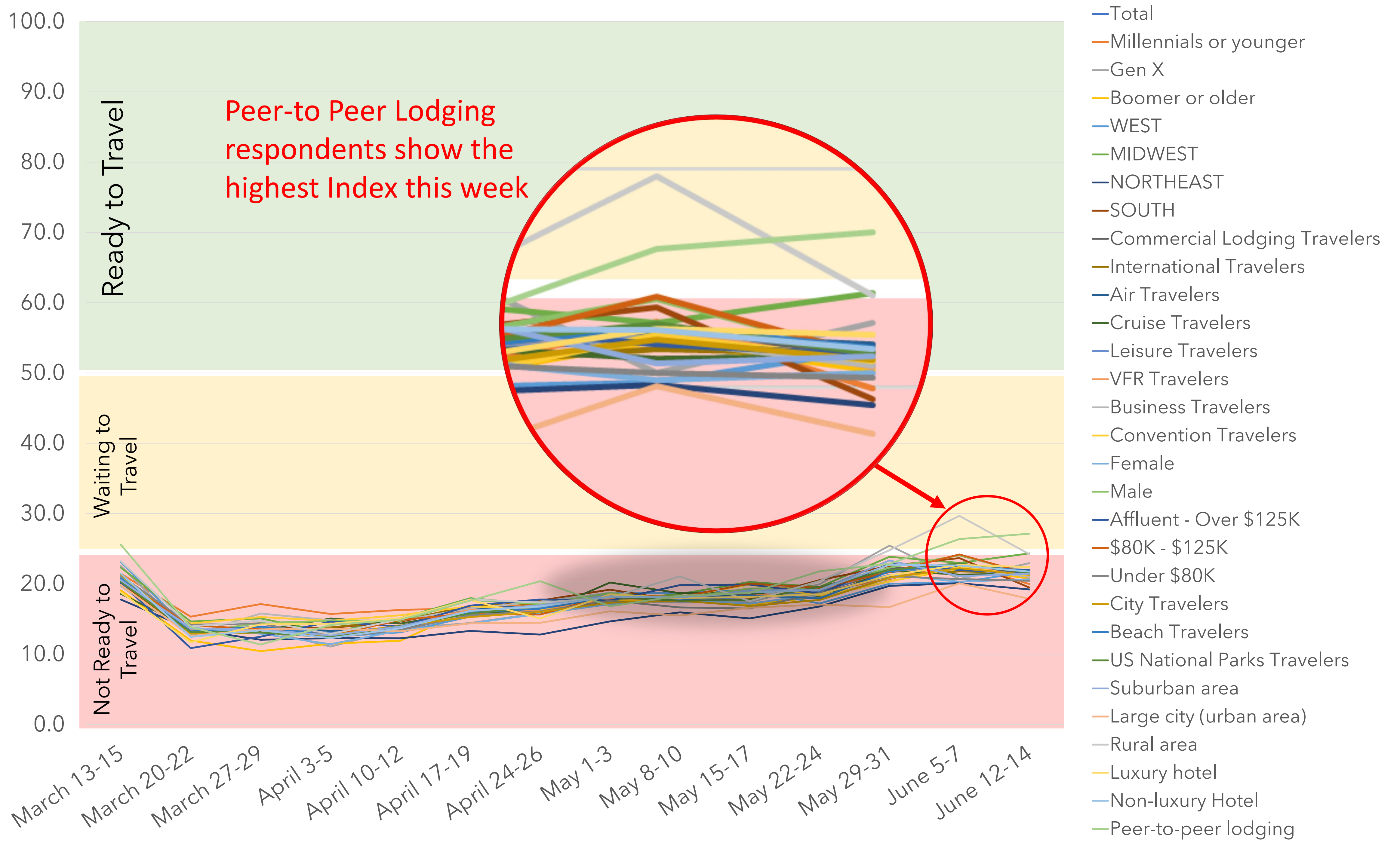
Healthy Travel Outlook



Travel Outlook

Neutral

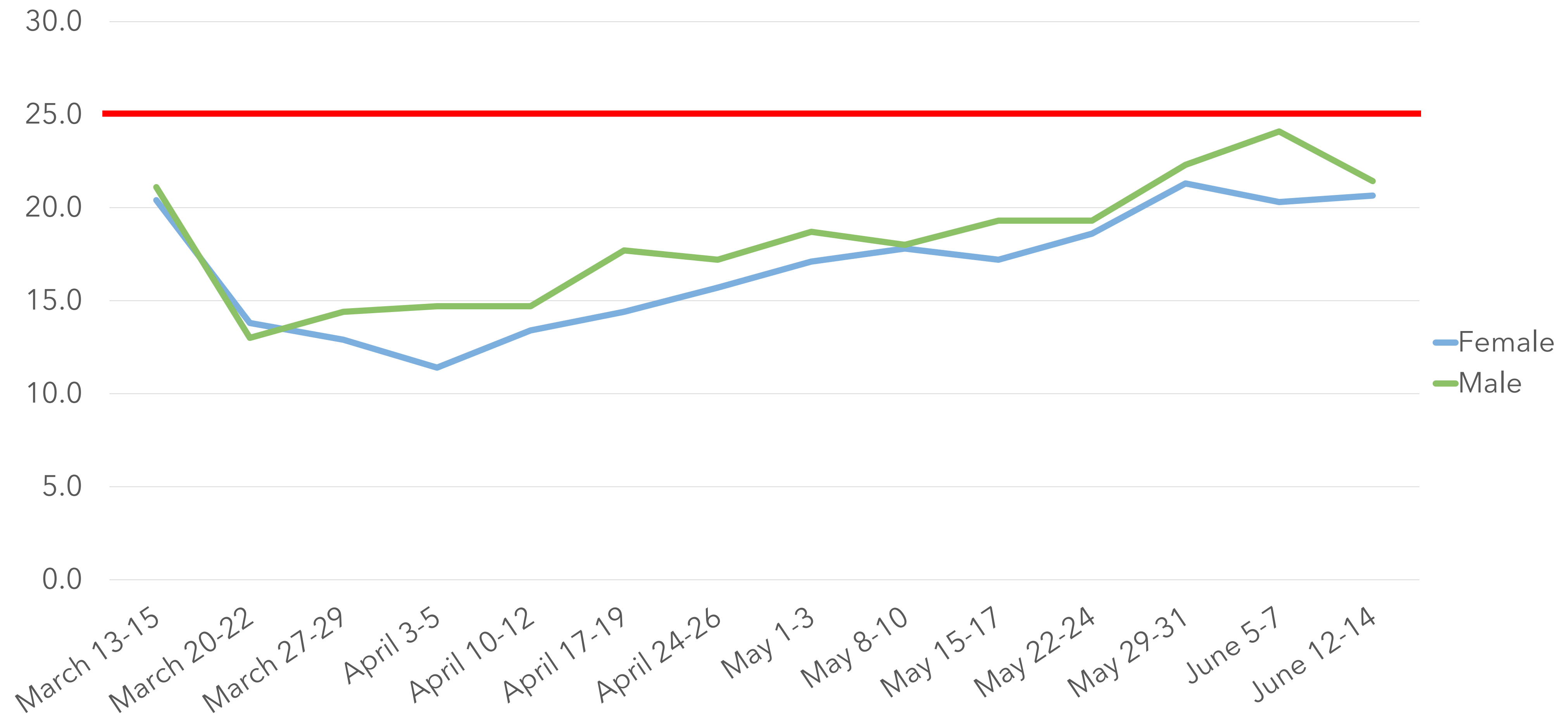




Gender

Points of Interest:

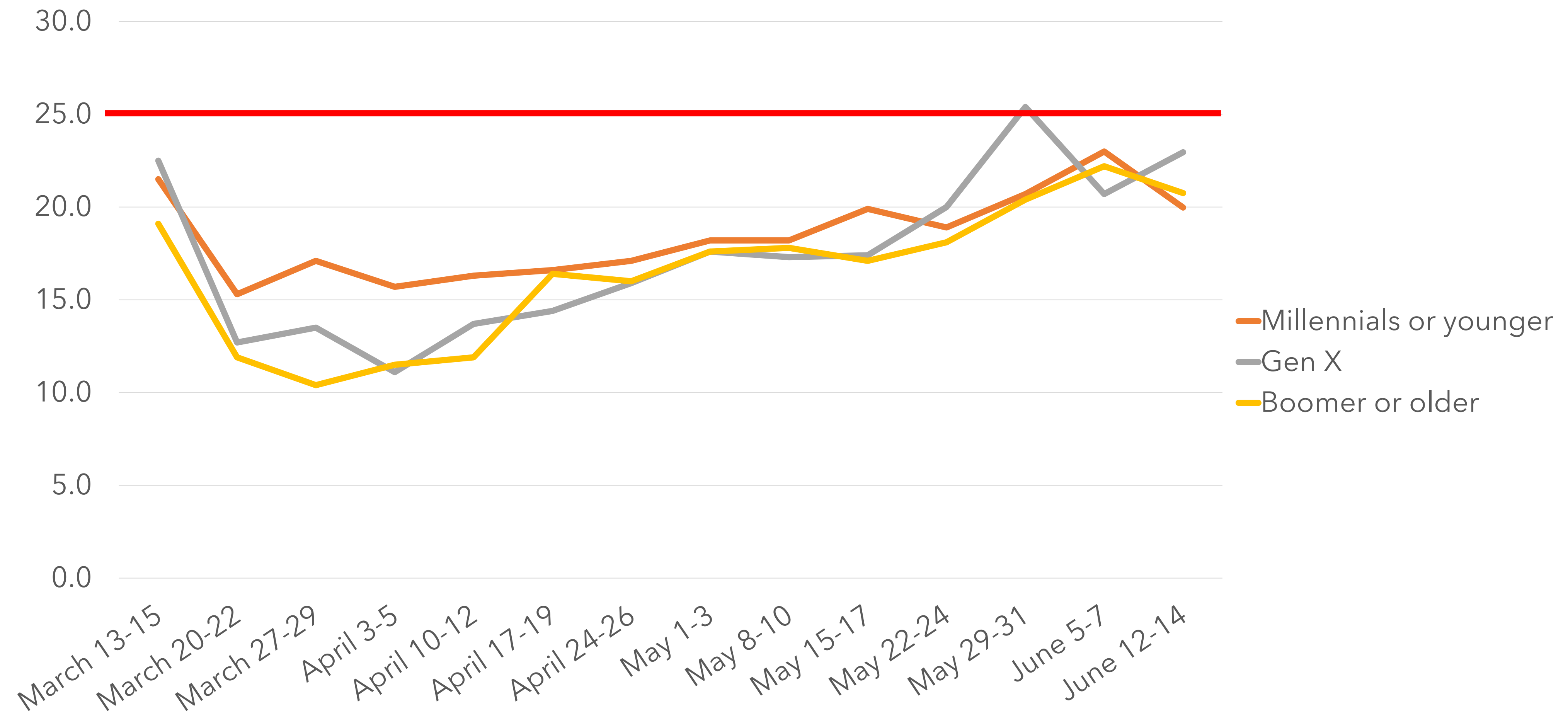
- Safety concerns decreased among Women this week and increased for Men.
- This week more Men reported they “have no plans to travel in 2020” (27.8% up from 21.1% two weeks ago), while this stat for Women remains largely unchanged week over week.



Generation

Points of Interest:

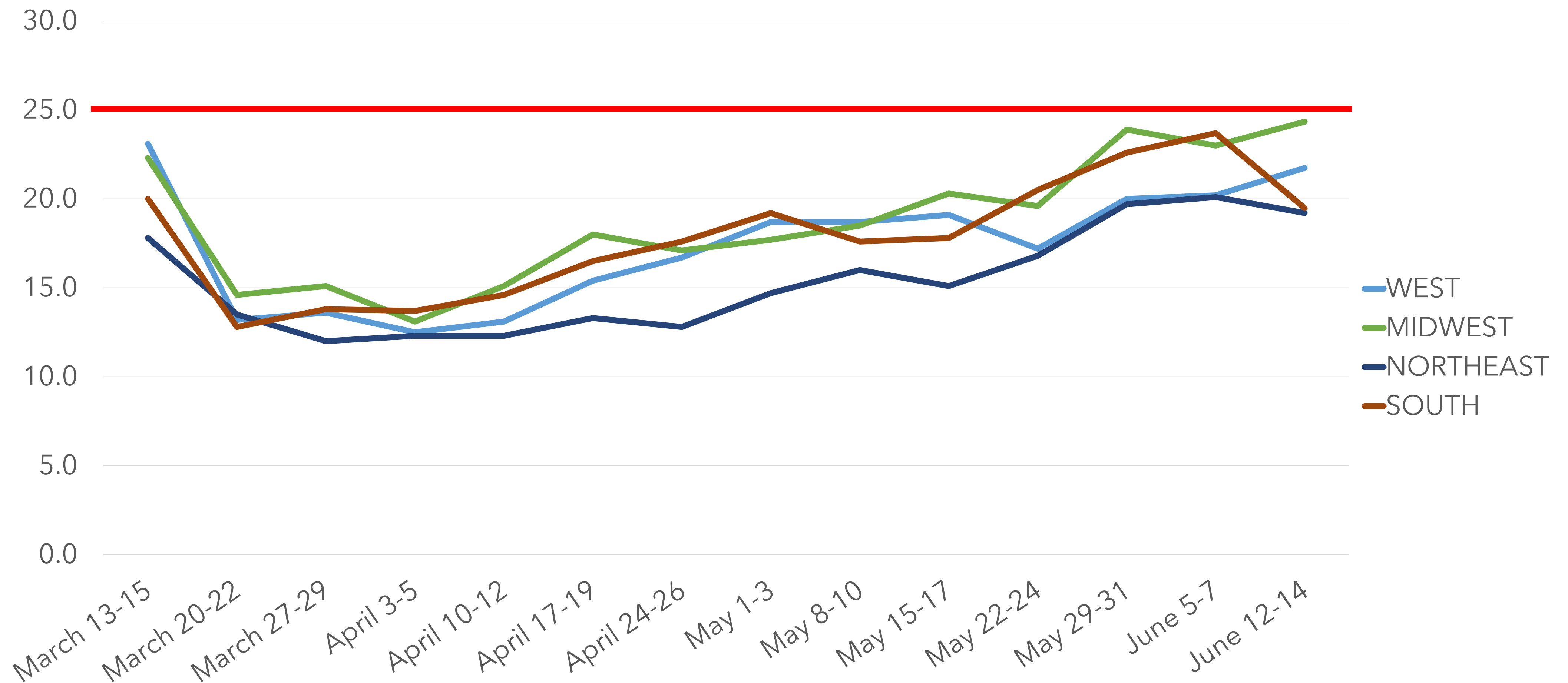
- Gen X was the only generation to show decreases in both safety and financial concerns this week, while Millennials and Boomers showed slight increases in both concern metrics.
- Gen X also showed a slight rise in openness to travel messaging while both Millennials and Boomers saw slight drops.



US Region

Points of Interest:

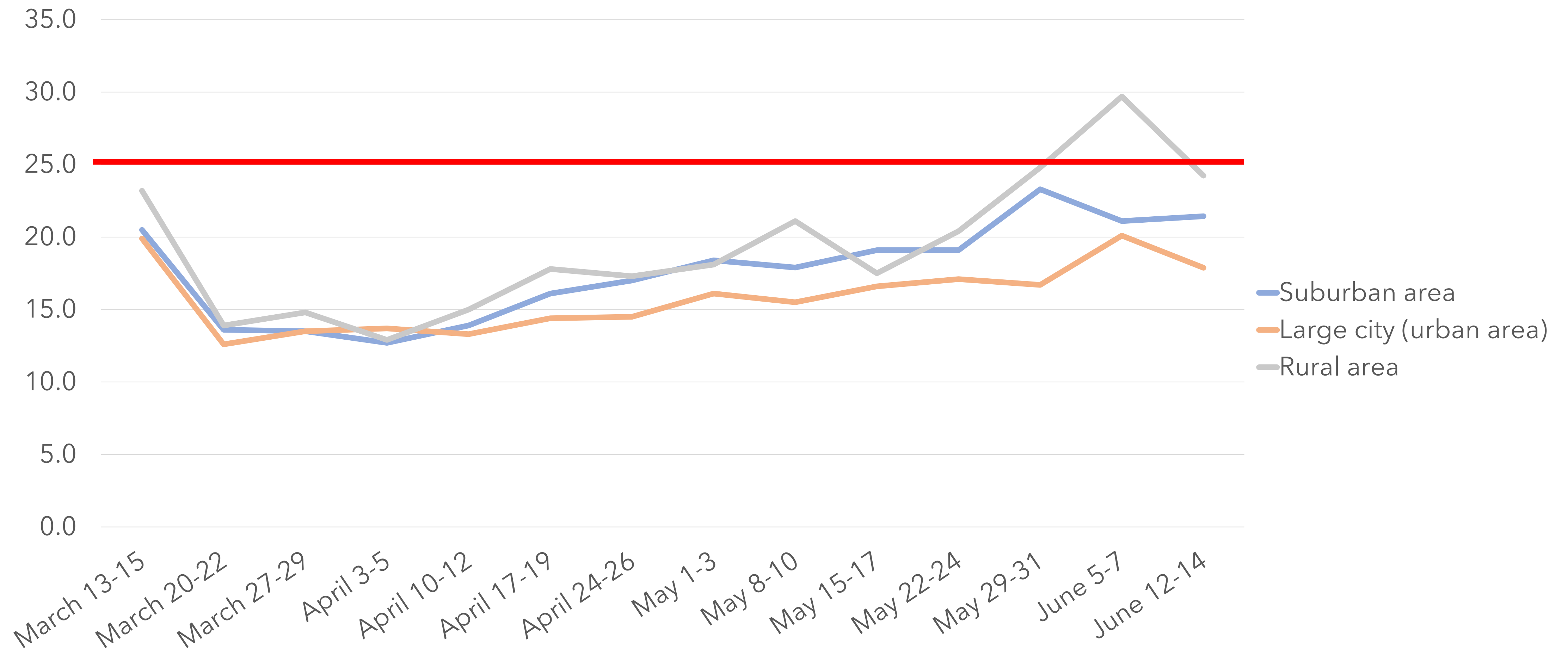
- Both safety and financial concerns decreased in the West and Midwest regions this week and increased in the Northeast and South.
- The South was the only US region this week to show a decrease in excitement for travel this week.



Type Of Residence

Points of Interest Impacting Index Scores:

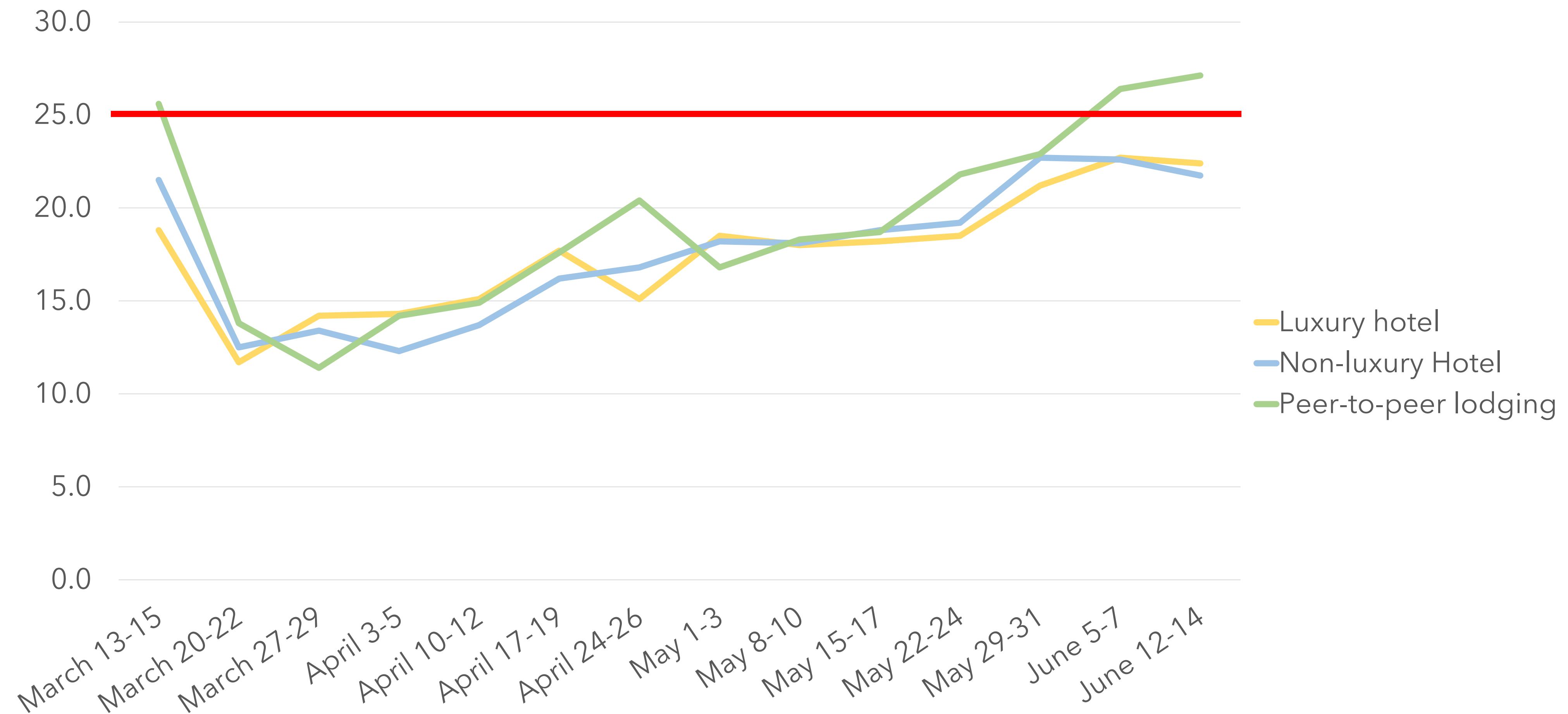
- The consistent growth in optimism among Rural respondents in the last four weeks has shown some hesitation this week, but they are still showing higher average index scores than their Urban and Suburban counterparts.
- Safety concerns decreased modestly for Suburban respondents this week while showing slight increases for Urban and Rural respondents.



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer lodging travelers are the only segment with an average index score above 25 this week.
- Peer-to-peer lodging travelers reported the biggest increase in excitement for travel while Luxury hotel travelers showed the biggest decreases in both safety and financial concerns this week.





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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