

DESTINATION ANALYSTS'
CORONAVIRUS
TRAVEL SENTIMENT
INDEX REPORT

KEY FINDINGS—WEEK OF JULY 19TH, 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 19th

Please cite Destination Analysts when using or distributing this data

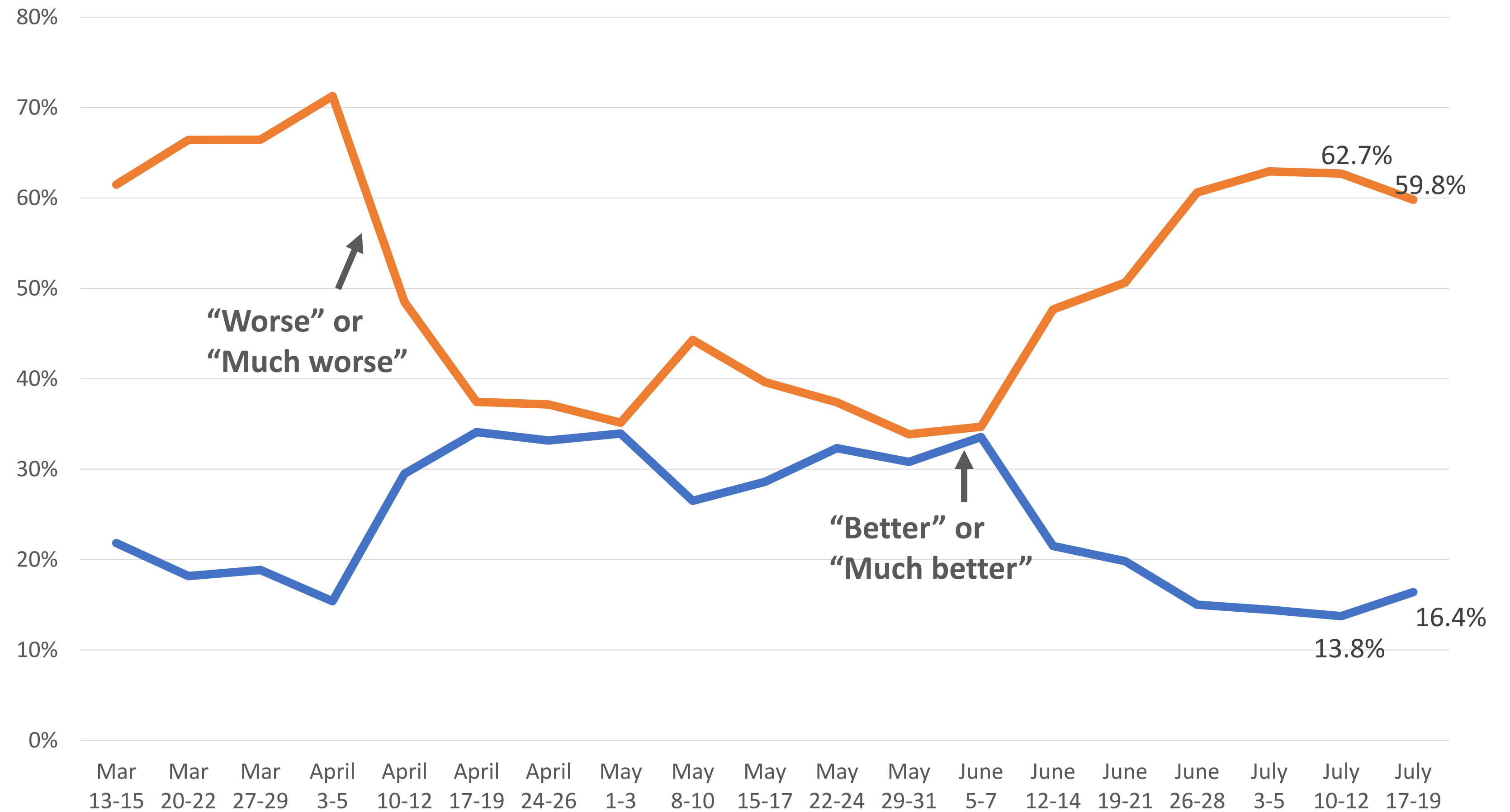
Expectations for the Coronavirus Outbreak

American travelers' morale about COVID-19 improved marginally this week: health and financial concern levels lowered very slightly and 16.4% of travelers expect things to get better in the next month, up from 13.8%.

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, 1,213 and 1,200 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 and 17-19, 2020)



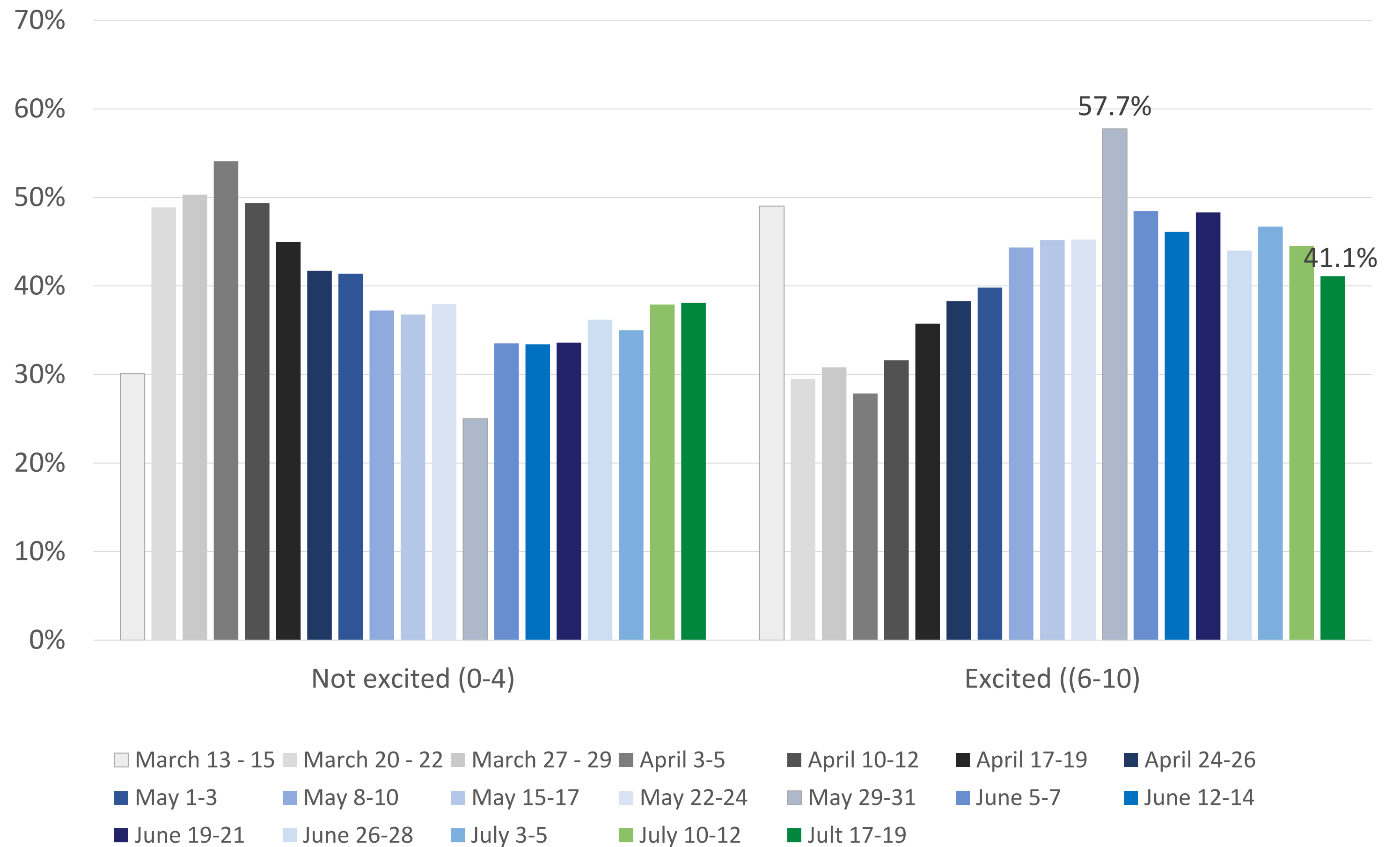
Excitement to Travel Now (Excited vs. Not Excited)

Their travel spirits, however, remain significantly depressed. Yet another record 46.7% of American travelers now say they don't have any trip plans for the remainder of 2020. Only 41.1% express any meaningful enthusiasm about the possibility of taking a getaway in the next month (down from 57.7% at the end of May), and just 36.6% feel open to travel inspiration—levels not recorded since the height of the lock-down in April.

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: 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, 1,213 and 1,200 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 and 17-19, 2020)

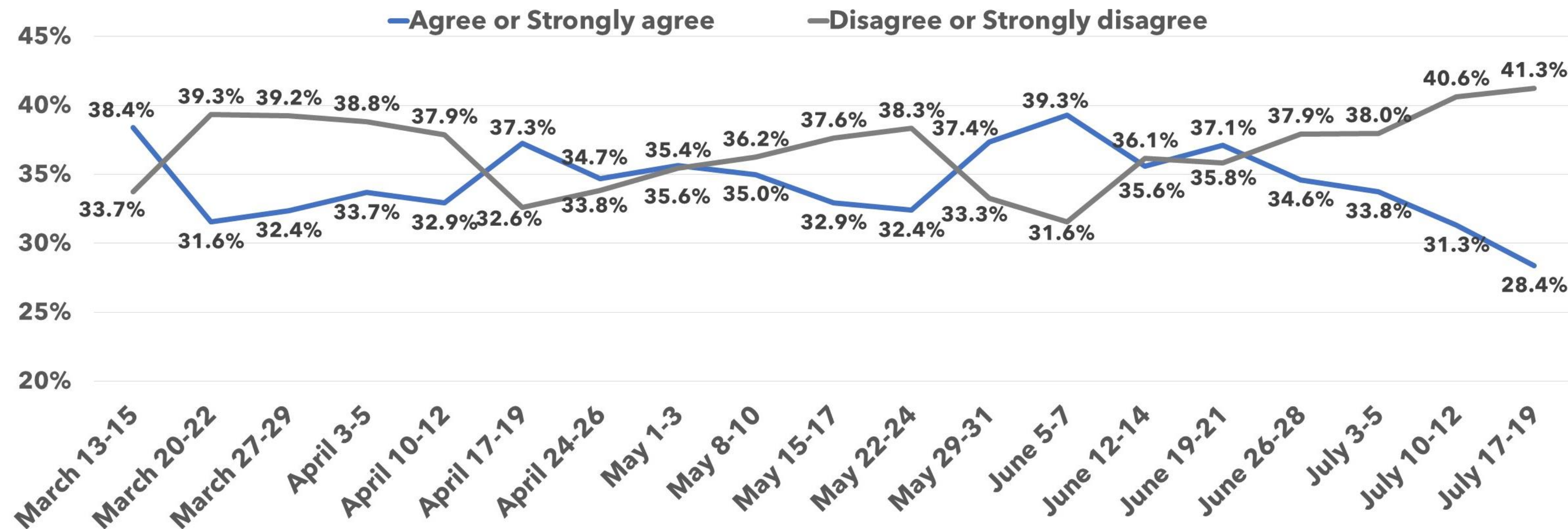


Travel Discounts

Even discounts and price cuts' ability to motivate travel in the next 3 months is down to 28.4%, with a larger proportion of travelers disagreeing that deals could get them to find traveling more attractive.

HOW MOTIVATIONAL TRAVEL DISCOUNTS ARE FOR NEAR-TERM TRAVEL: MARCH—JULY 2020

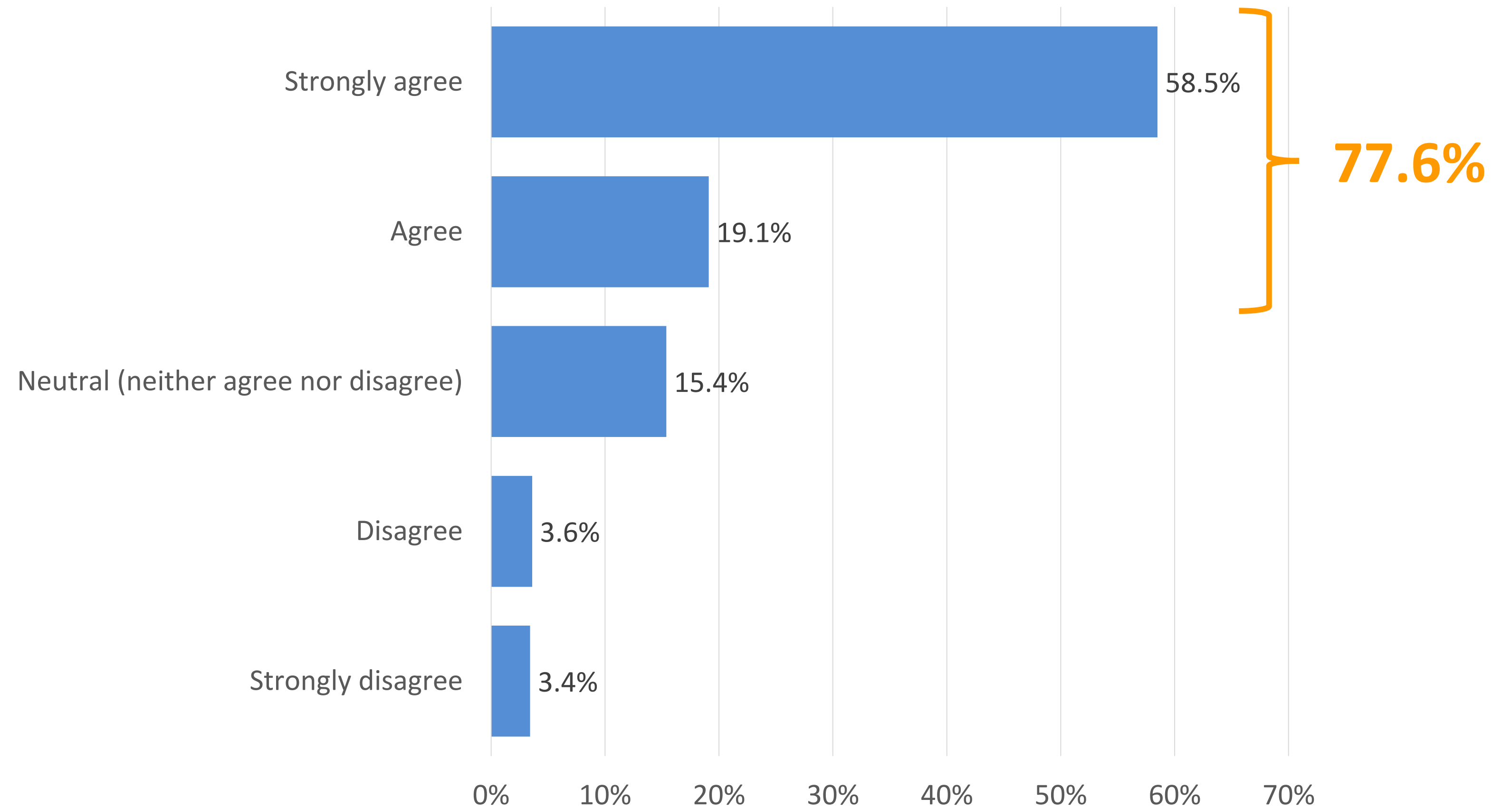
STATEMENT AGREEMENT: THE CORONAVIRUS HAS LED MANY TRAVEL PROVIDERS TO CUT THEIR PRICES. THESE DISCOUNTS AND PRICE CUTS (AIRLINE, HOTEL, ETC.) MAKE ME MORE INTERESTED IN TRAVELING IN THE NEXT THREE (3) MONTHS.



(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, 1,213 and 1,200 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 and 17-19, 2020)

Face Masks in Public

As the pandemic continues its assault on the United States and many travel and hospitality professionals find themselves leading or in the middle of mask debates, this week we looked into American travelers' likely use of masks while traveling and their support of mandatory policies. First, we found that **77.6% agree that face masks should be worn in public, and 66.6% say they “always” wear one while out** (those that don't always most commonly cite that there aren't enough people around for it to be necessary).



Question: How much do you agree with the following statement?

Statement: In this environment, people should wear face masks when they are in public.

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

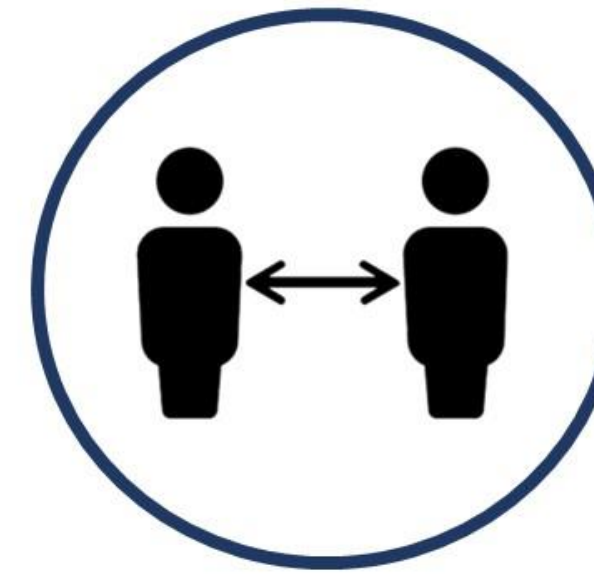
Practiced Pandemic-Era Travel Etiquette

Right now, 68.8% of American travelers plan to wear a face mask during trips taken over the next 6 months. American travelers also largely plan to practice other pandemic etiquette such as following social distancing guidelines.

PRACTICED PANDEMIC-ERA TRAVEL ETIQUETTE



WEAR A
FACE MASK
(68.8%)



FOLLOW SOCIAL
DISTANCING GUIDELINES
(63.0%)



AVOID
CROWDS
(61.6%)



CARRY
HAND SANITIZER
(59.0%)



ONLY EAT RESTAURANT
TAKE-OUT
(NO SIT-DOWN SERVICE)
(37.1%)



WEAR
GLOVES
(19.0%)

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

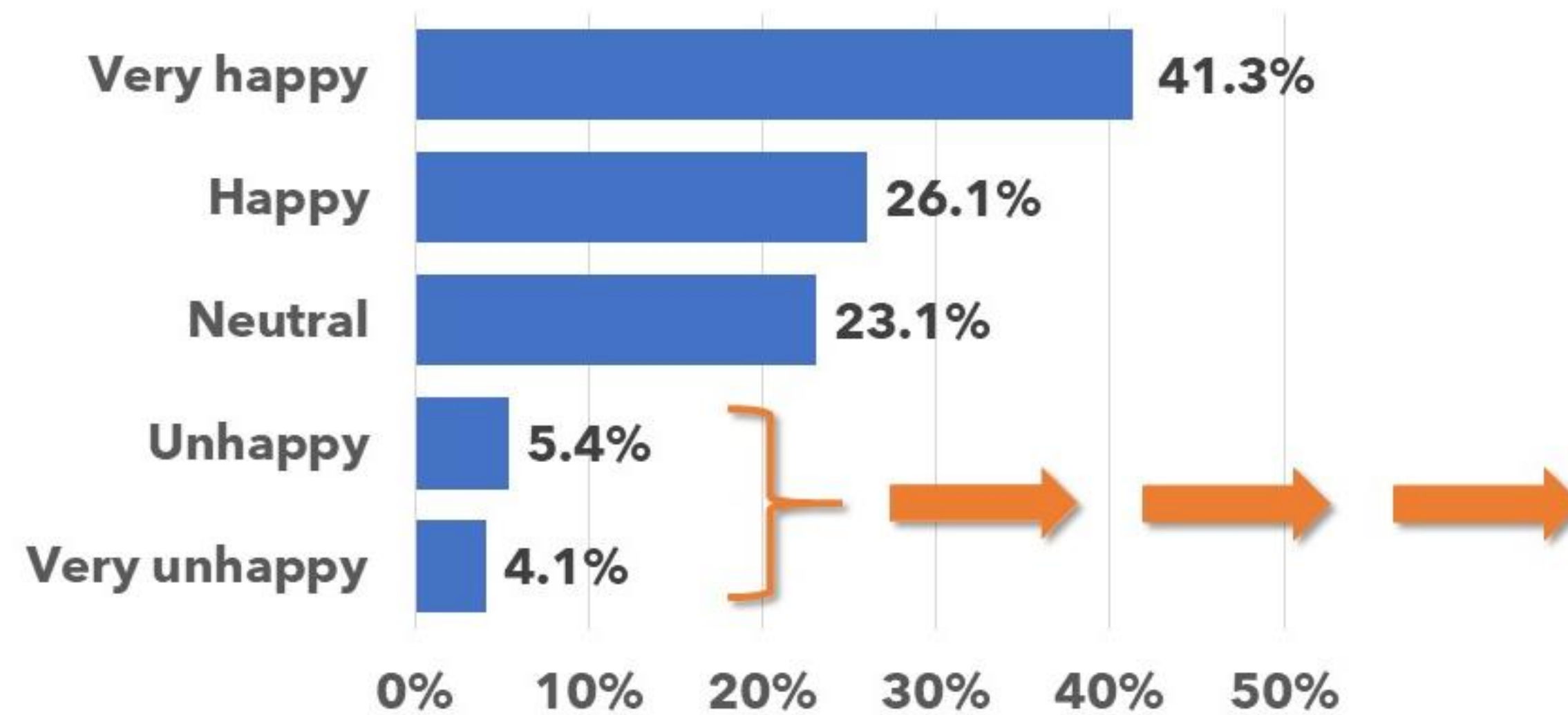
(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

Feelings About Destinations Requiring Masks

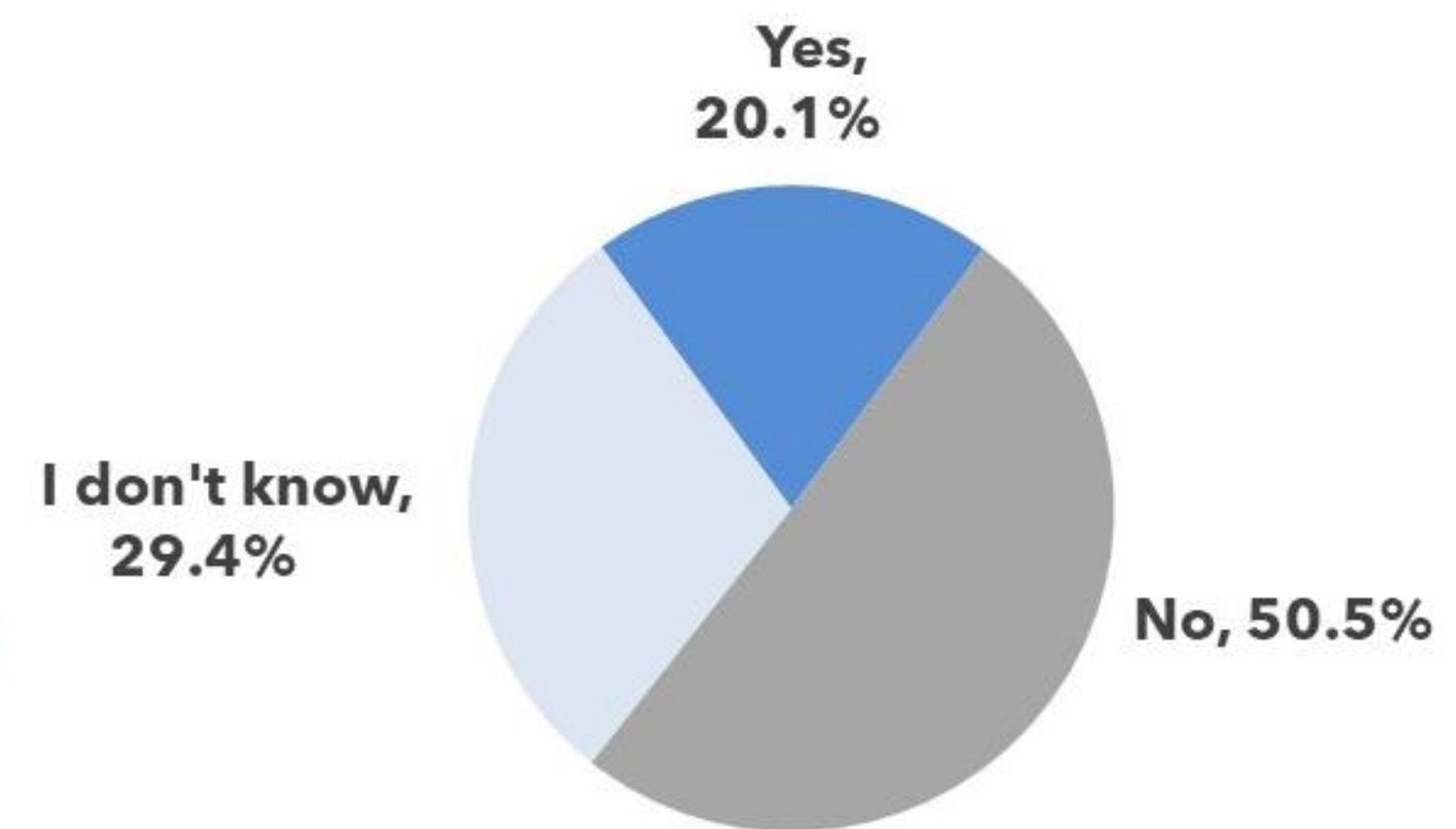
When asked how they would feel if a destination they wanted to visit required visitors and residents to wear masks while in public, over two-thirds (67.4%) said that would make them happy or, most likely, very happy. Those 9.5% that expressed unhappiness about a mask mandate were asked if this requirement alone would be enough to keep them from visiting a place they otherwise wanted to visit. One in five of this group said it would, half said no and the remaining 30% said they weren't sure.

FEELINGS ABOUT DESTINATIONS REQUIRING MASKS

Q: WHICH BEST DESCRIBES HOW YOU WOULD FEEL IF A DESTINATION YOU WANTED TO VISIT REQUIRED VISITORS AND RESIDENTS TO WEAR MASKS WHILE IN PUBLIC?



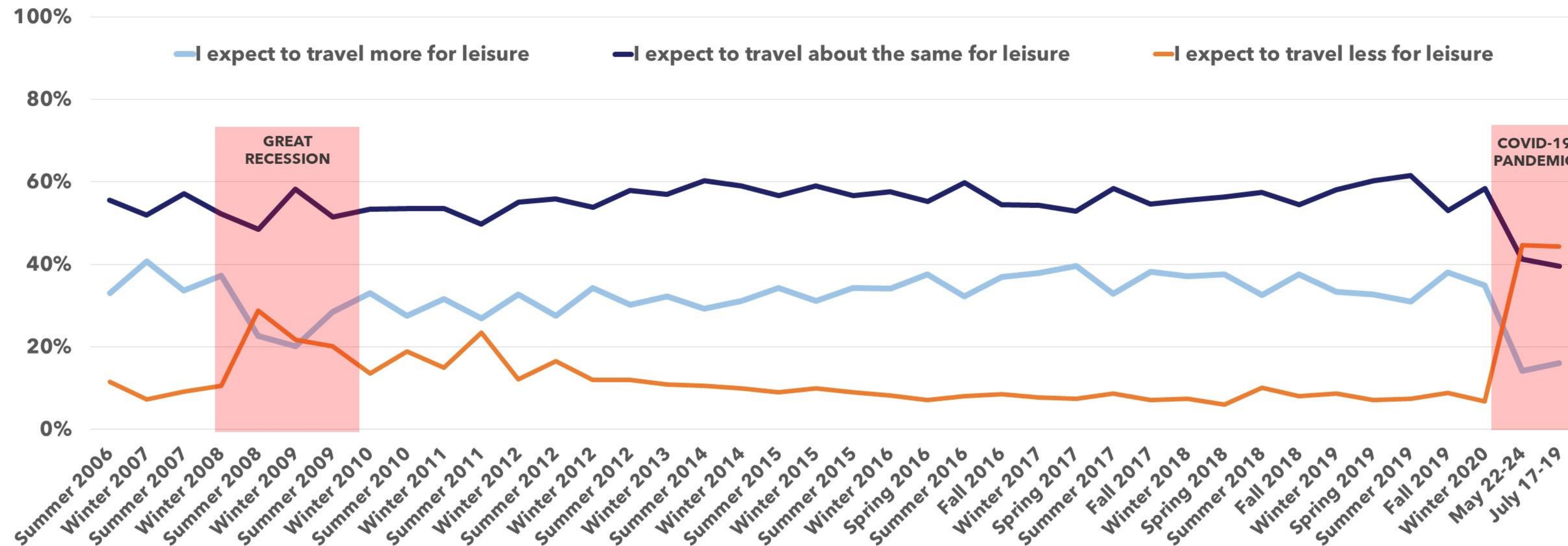
Q: WOULD THIS REQUIREMENT ALONE BE ENOUGH TO KEEP YOU FROM VISITING A PLACE YOU OTHERWISE WANTED TO VISIT?



Historical Perspective—Leisure Travel Expectations

Nearly 5 months into the pandemic and more than half way through 2020, this week was a good time to revisit how Americans feel about their travel as they look out over the next year. **While Americans continue to feel down on near-term travel, they are exhibiting signs of optimism for the next 12 months overall.** When we last did this exercise the week of May 25th, the proportion of travelers who said they would increase the number of leisure trips they will take compared to the past 12 months had plummeted to 14.1% from 34.9% in January. Now, 16.0% say they expect to take more leisure trips in the next year than they did in the previous year.

HISTORICAL PERSPECTIVE: LEISURE TRAVEL EXPECTATIONS (TRIPS TAKEN) (AS OF JULY 20TH)



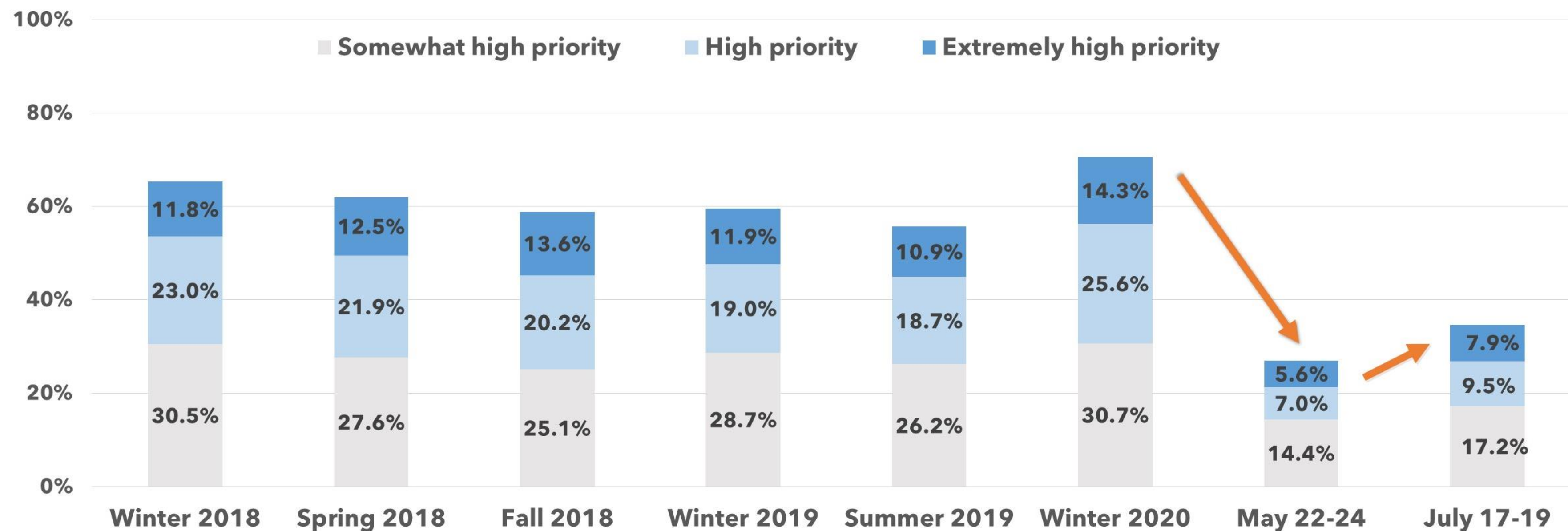
Q: IN THE NEXT 12 MONTHS, DO YOU EXPECT TO TRAVEL MORE OR LESS FOR LEISURE THAN YOU DID IN THE MOST RECENT 12-MONTH PERIOD?

Historical Perspective—Leisure Travel Expectations

Also positively trending for travel's future is the percent who say they will prioritize leisure travel in their spending. After falling to 26.9% in May from a record 70.6% in January, now 34.7% say they will prioritize leisure travel in their budget. Expected leisure travel budgets for the next year are also up to \$2,721 from \$2,361 six weeks ago.

HISTORICAL PERSPECTIVE: LEISURE TRAVEL AS A BUDGET PRIORITY (AS OF JULY 20TH)

Q: THINKING CAREFULLY ABOUT HOW YOU EXPECT TO SPEND YOUR INCOME IN THE NEXT 12 MONTHS, PLEASE USE THE SCALE BELOW TO DESCRIBE YOUR SPENDING PRIORITIES IN NEXT YEAR. **LEISURE TRAVEL WILL BE A...**



(Base: Wave 11 and Wave 19 data. All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-224 and July 17-19, 2020)



Coronavirus Travel Sentiment Index

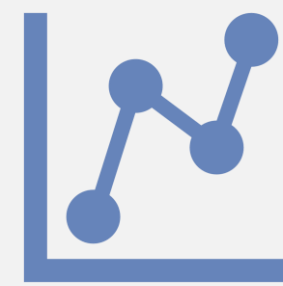
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 20th

What is a Predictive Index?



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



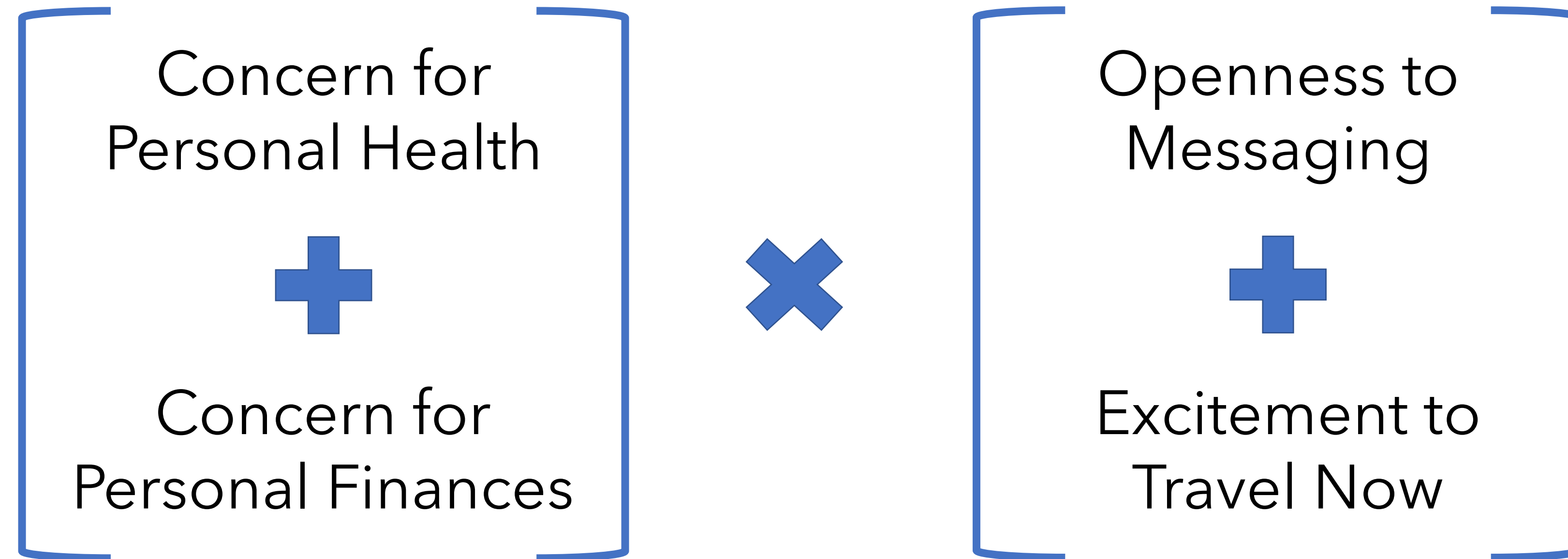
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

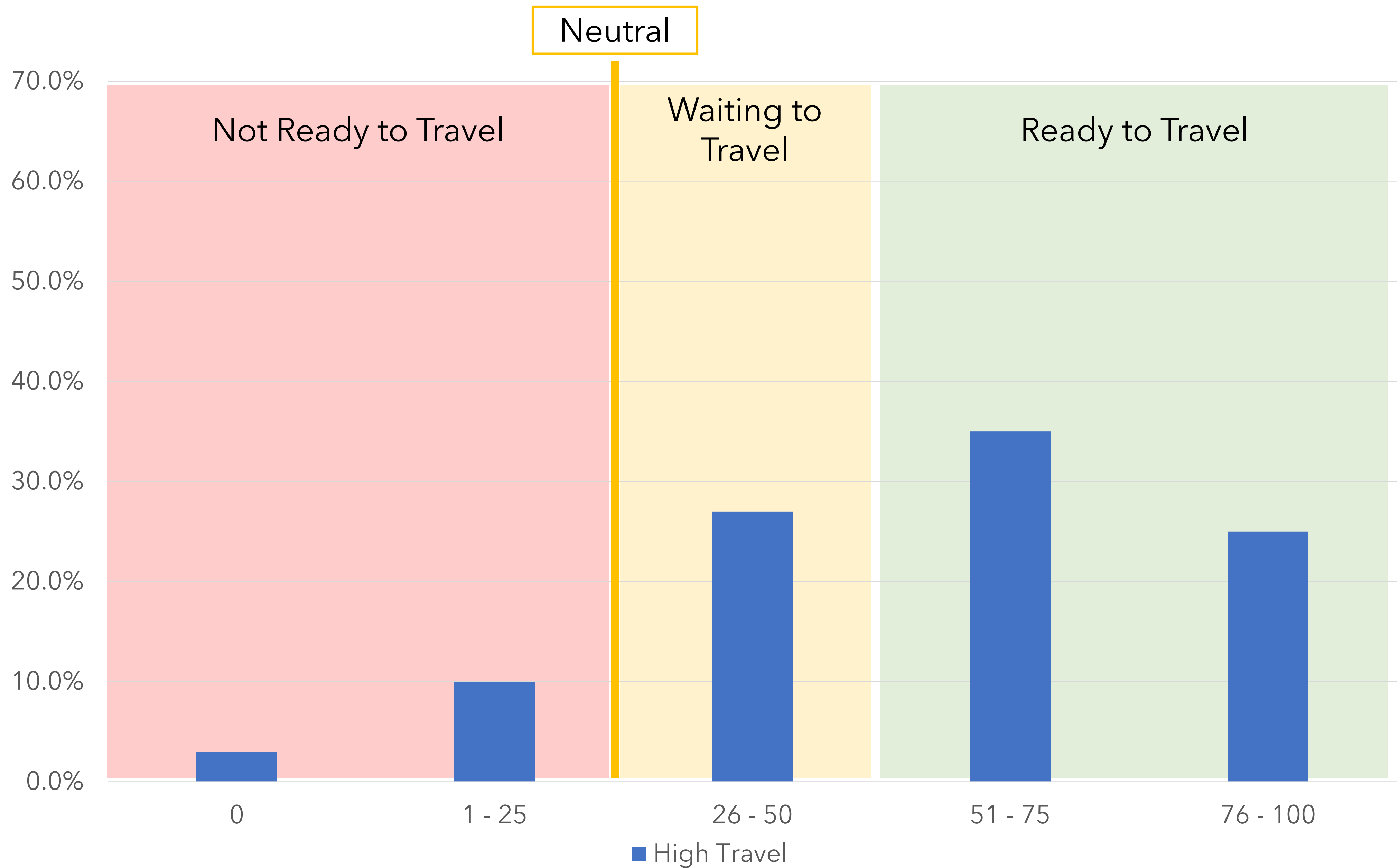
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

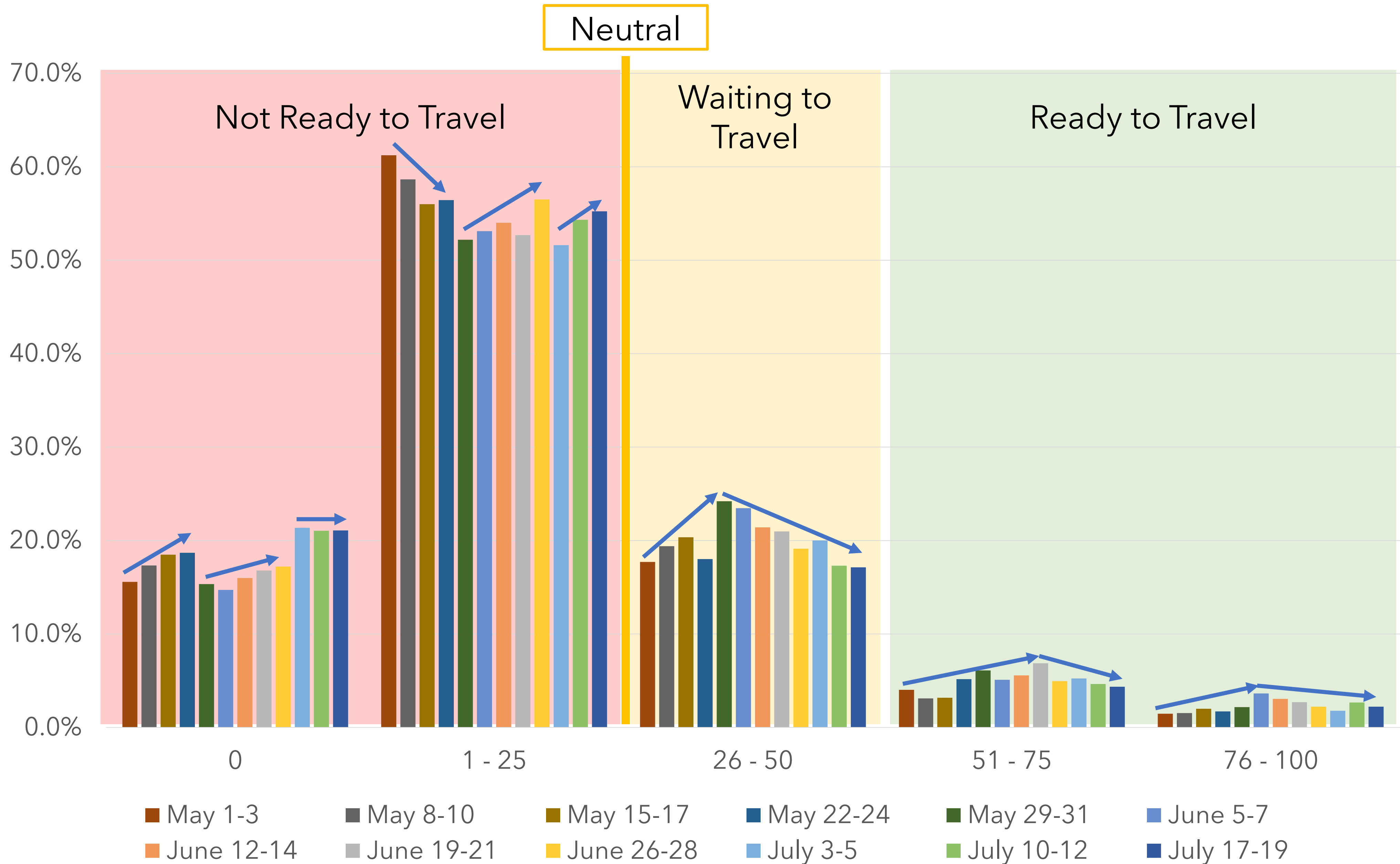


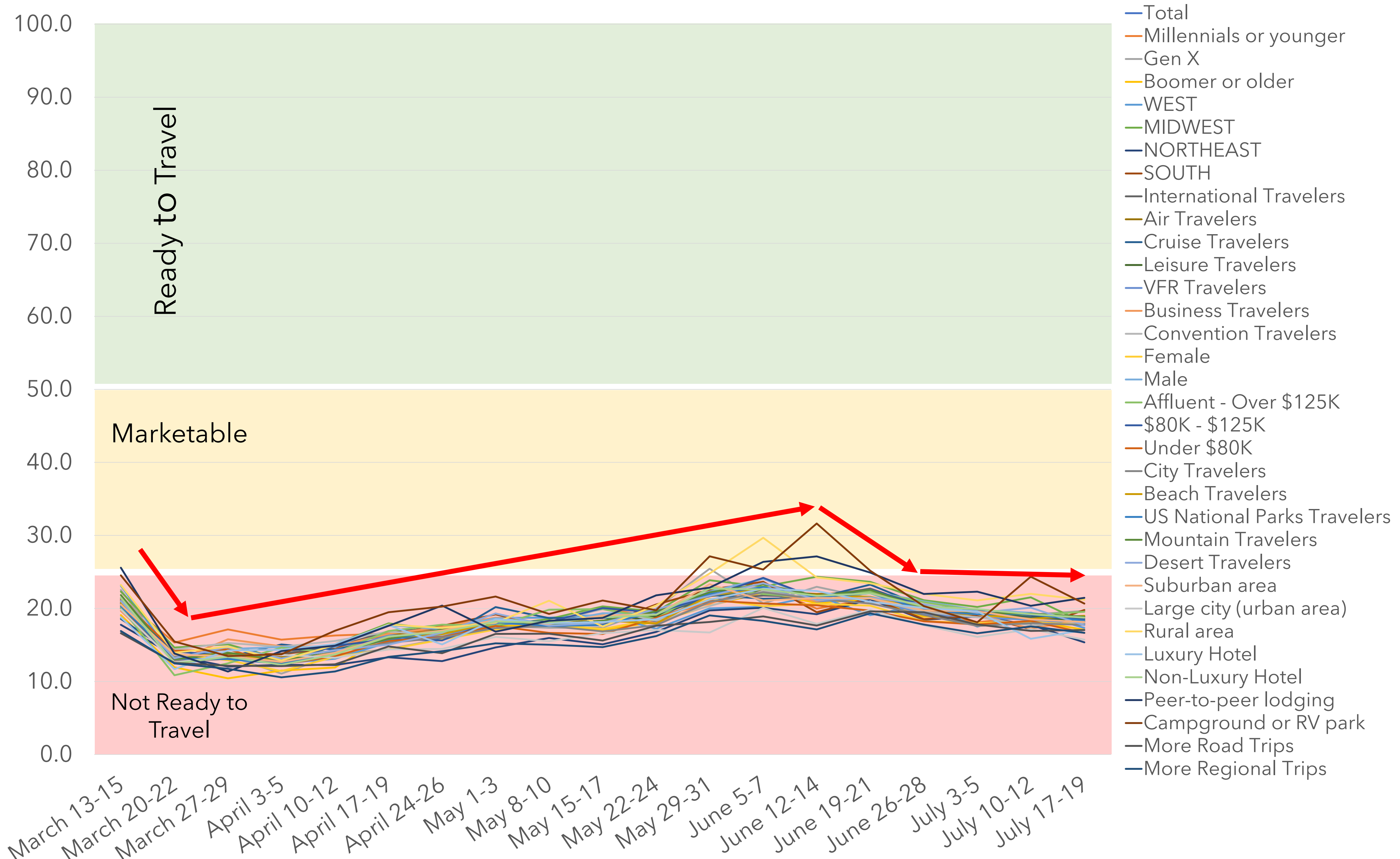
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook



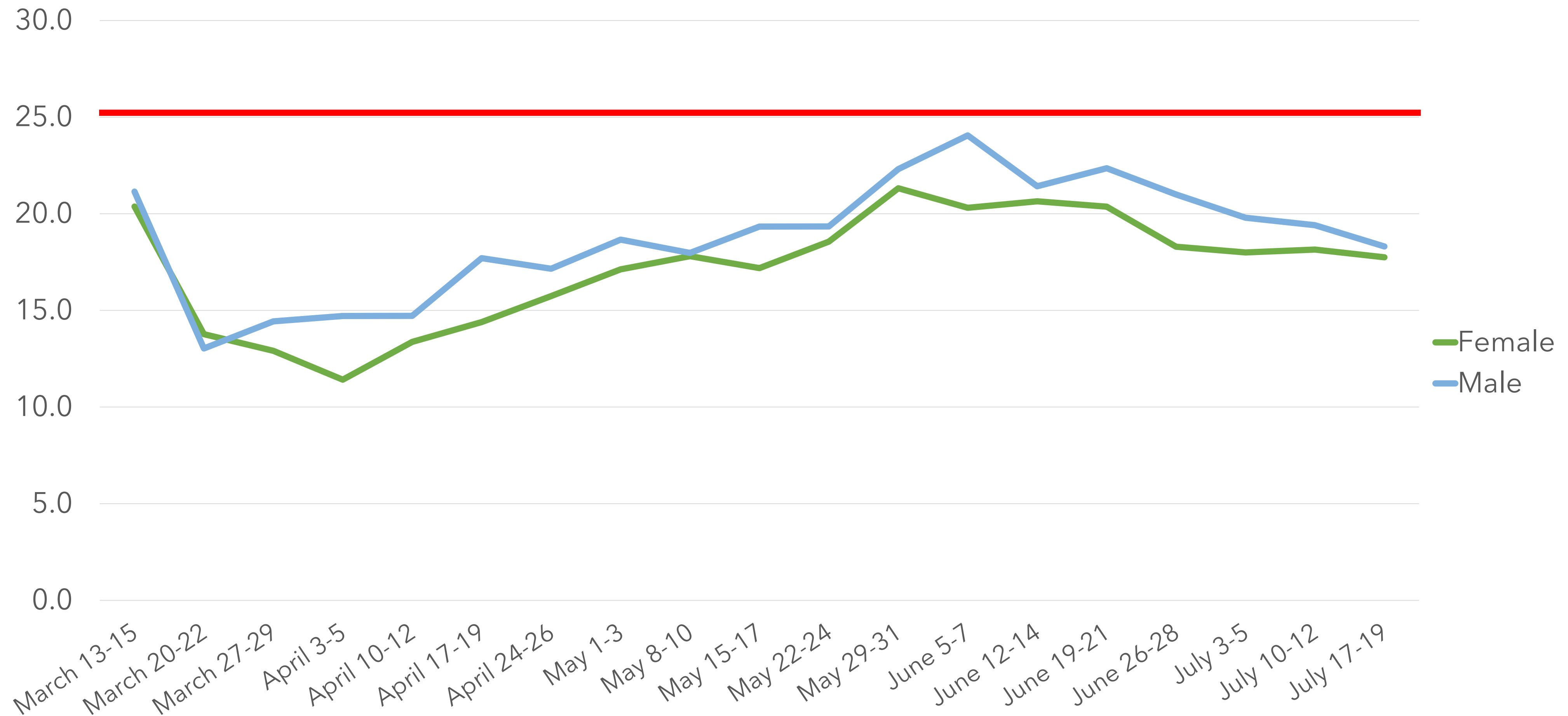


March 13-15
 March 20-22
 March 27-29
 April 3-5
 April 10-12
 April 17-19
 April 24-26
 May 1-3
 May 8-10
 May 15-17
 May 22-24
 May 29-31
 June 5-7
 June 12-14
 June 19-21
 June 26-28
 July 3-5
 July 10-12
 July 17-19

Gender

Points of Interest:

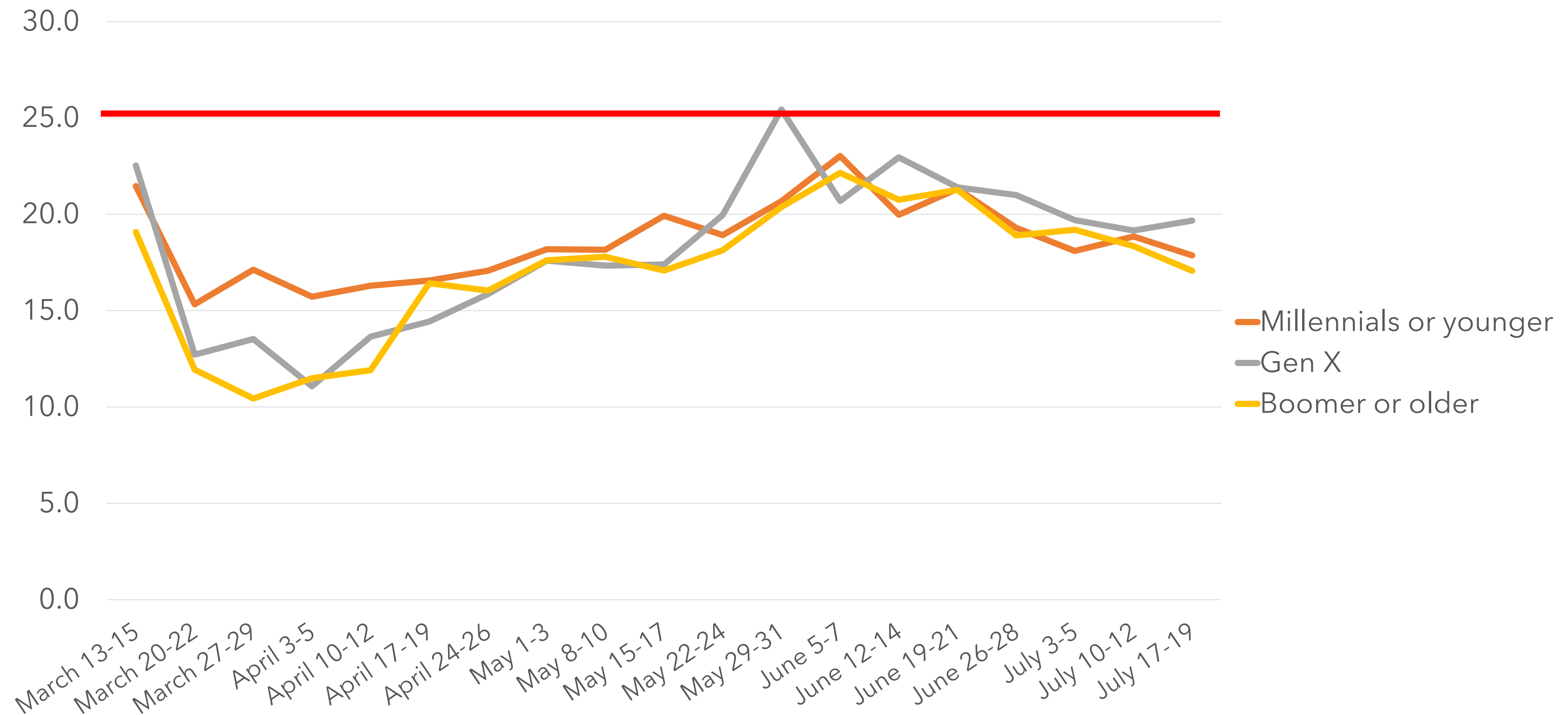
- Safety concerns showed little movement for both Men and Women this week.
- This week 49.3 percent of Women reported they have no plans to travel in 2020 (up from 45.3% last week).
- One-in-five Men this week (20.4%) said they are already traveling or ready to travel with no hesitations (compared to 15.6% of Women).



Generation

Points of Interest:

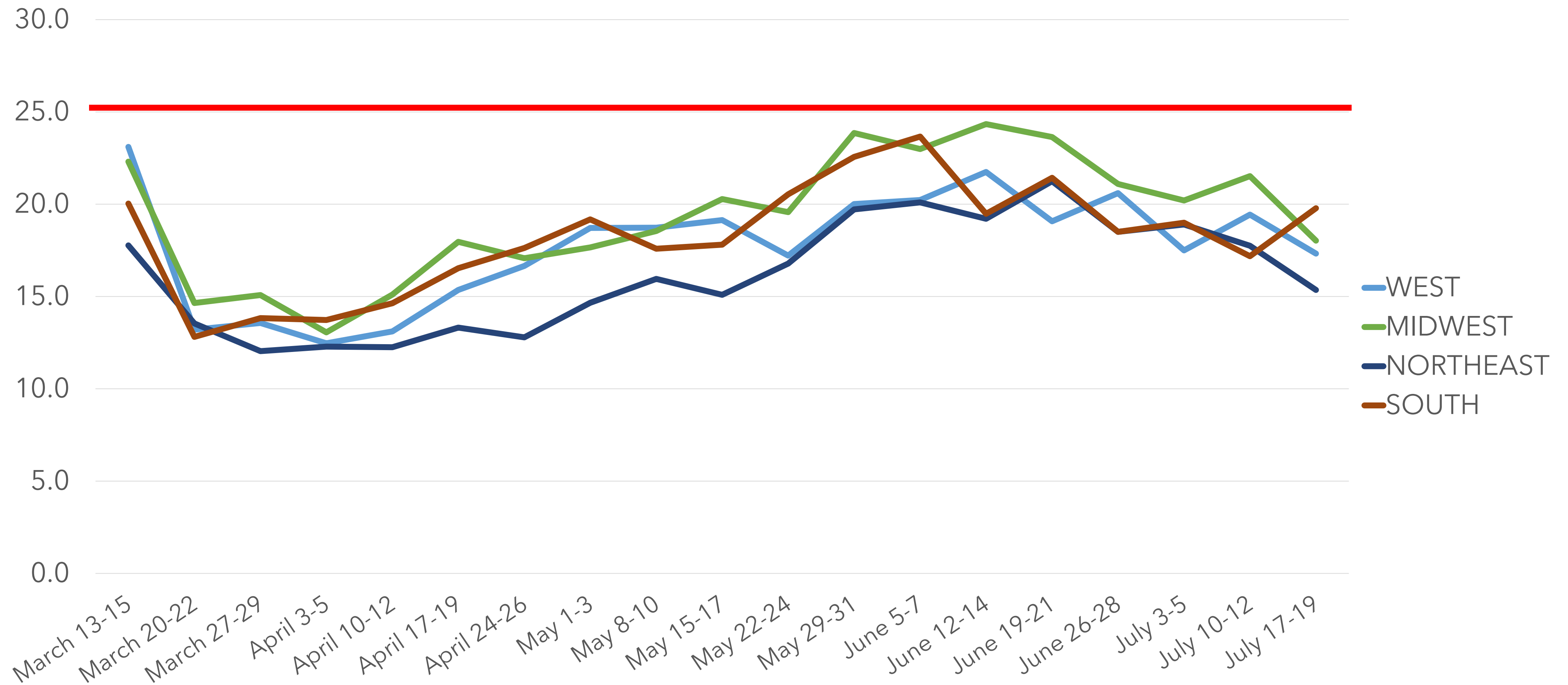
- Gen X continued to index higher than the other generations this week.
- Gen X showed a slight decrease in safety concerns this week compared to the other generations.
- Over a third of Millennials (36.6% up from 33.3% last week) reported they would be Happy or Very happy to see an ad promoting their community for travel (compared to a quarter or less of Gen X and Boomers).



US Region

Points of Interest:

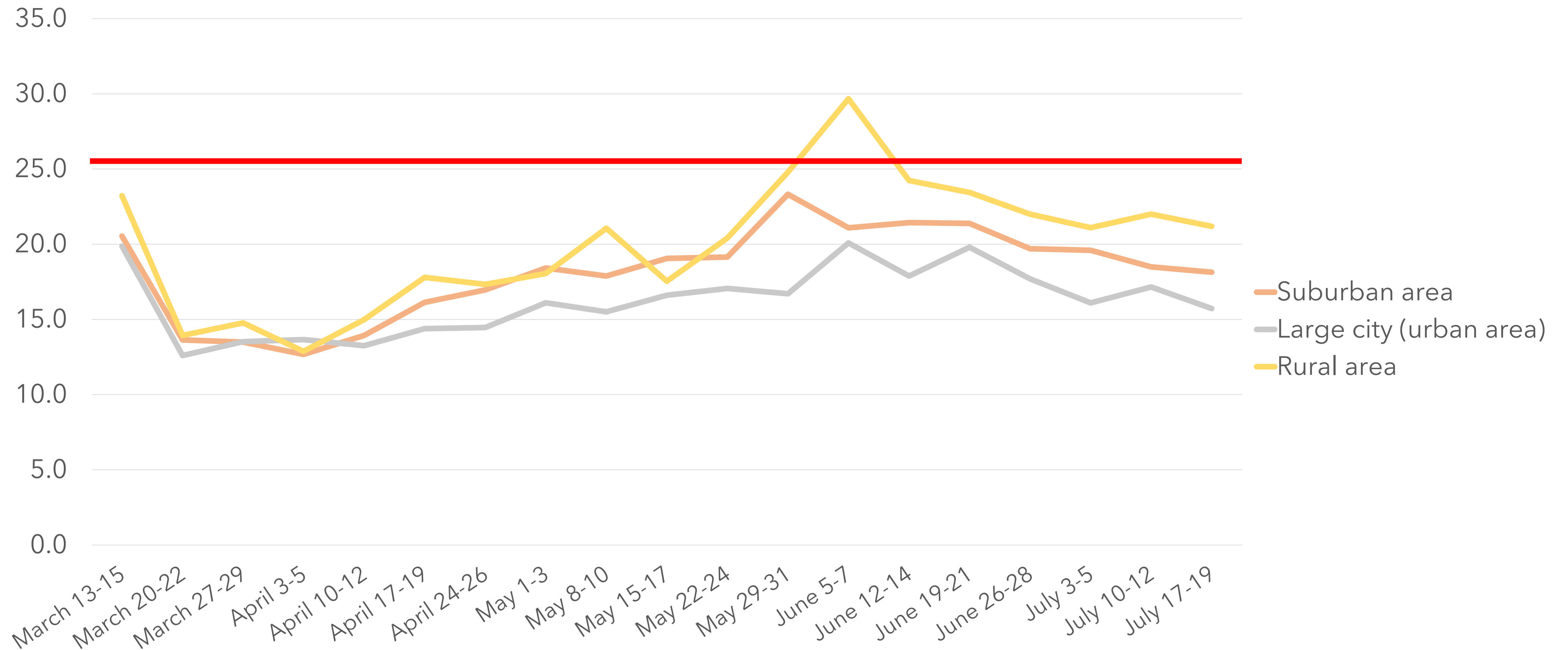
- The South indexed highest amongst US regions this week.
- The South showed a slight decrease in safety concerns this week while the other regions showed increases.
- The Midwest and South regions showed more excitement for travel and openness for travel messaging this week than the other US regions.



Type Of Residence

Points of Interest Impacting Index Scores:

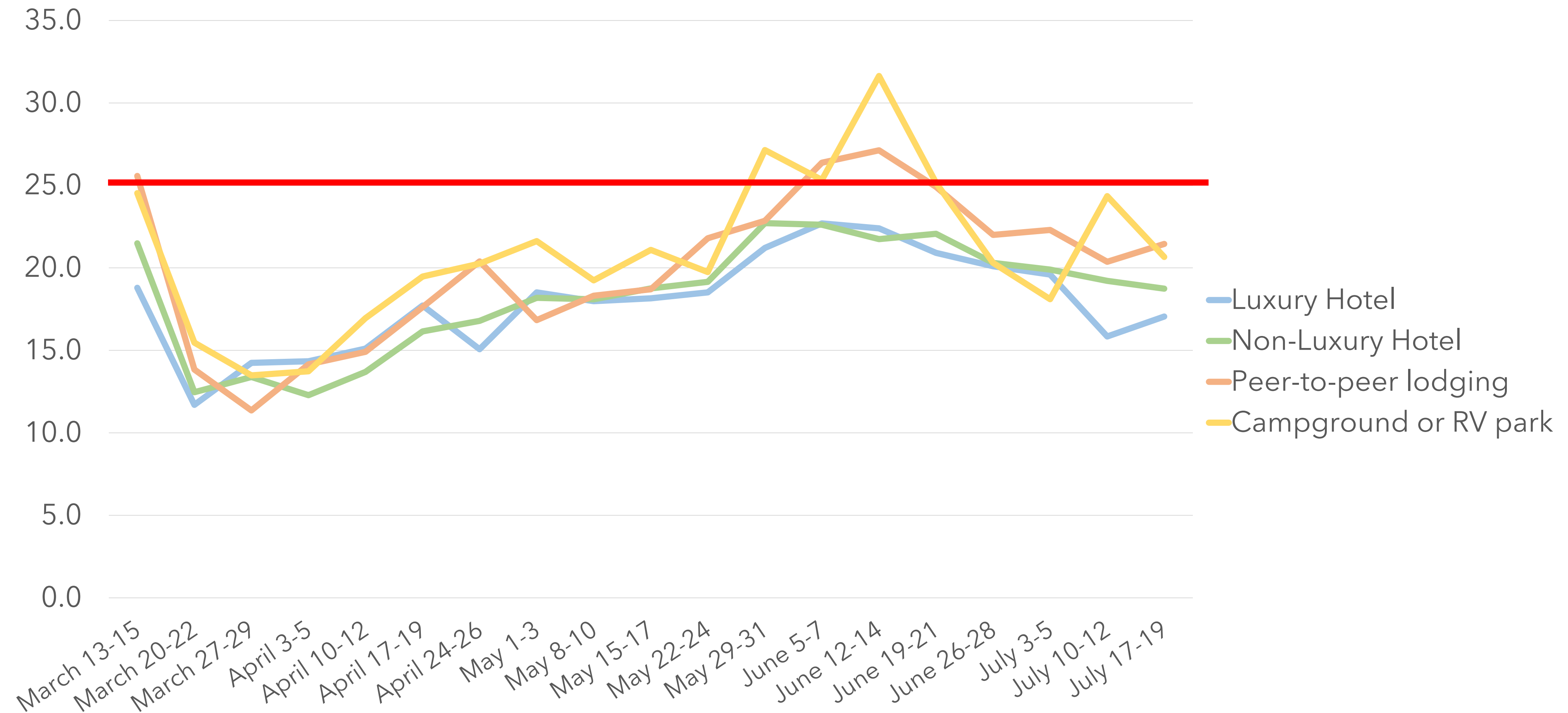
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Large city Urban respondents reported the relatively highest safety concerns this week.
- Suburban respondents were the most likely to say they'd feel safer dining outside while Urban respondents were the most likely to select "Neutral - I wouldn't feel safer either way."



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer respondents indexed highest amongst lodging types this week.
- While the average for all travelers was around 60 percent, Luxury Hotel respondents were the most likely to say they "Always" wear a face mask when going out in public this week (71.6%).





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/>

In Their Words: Black Travelers on the State of Travel

During our webinar on July 7th, 2020, Robin McClain, SVP of Marketing & Communications at Destination DC, led a panel of black travelers in conversation about their travel experiences and what the travel industry can do to market and make travel an equally inclusive leisure activity. Below are a few quotes we heard from the panelists:

- *"If there is a fighting chance that someone is going to look like me, I'm going to dig a little bit deeper and see what they offer."*
- *"That is certainly something that I look into exploring and researching: if a country or a destination or city is friendly or welcoming to African Americans."*

The complete blog post can be accessed at:
<https://www.destinationanalysts.com/blog-in-their-words-black-travelers-on-the-state-of-travel/>



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