

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**PRESENTATION OF FINDINGS
WEEK OF JULY 5TH, 2020**

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.

We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Resident + Stakeholder Research

Online Focus Groups

Custom Insights

info@destinationanalysts.com



Research Overview & Methodology

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 17 data (fielded July 3-5) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S. Regions





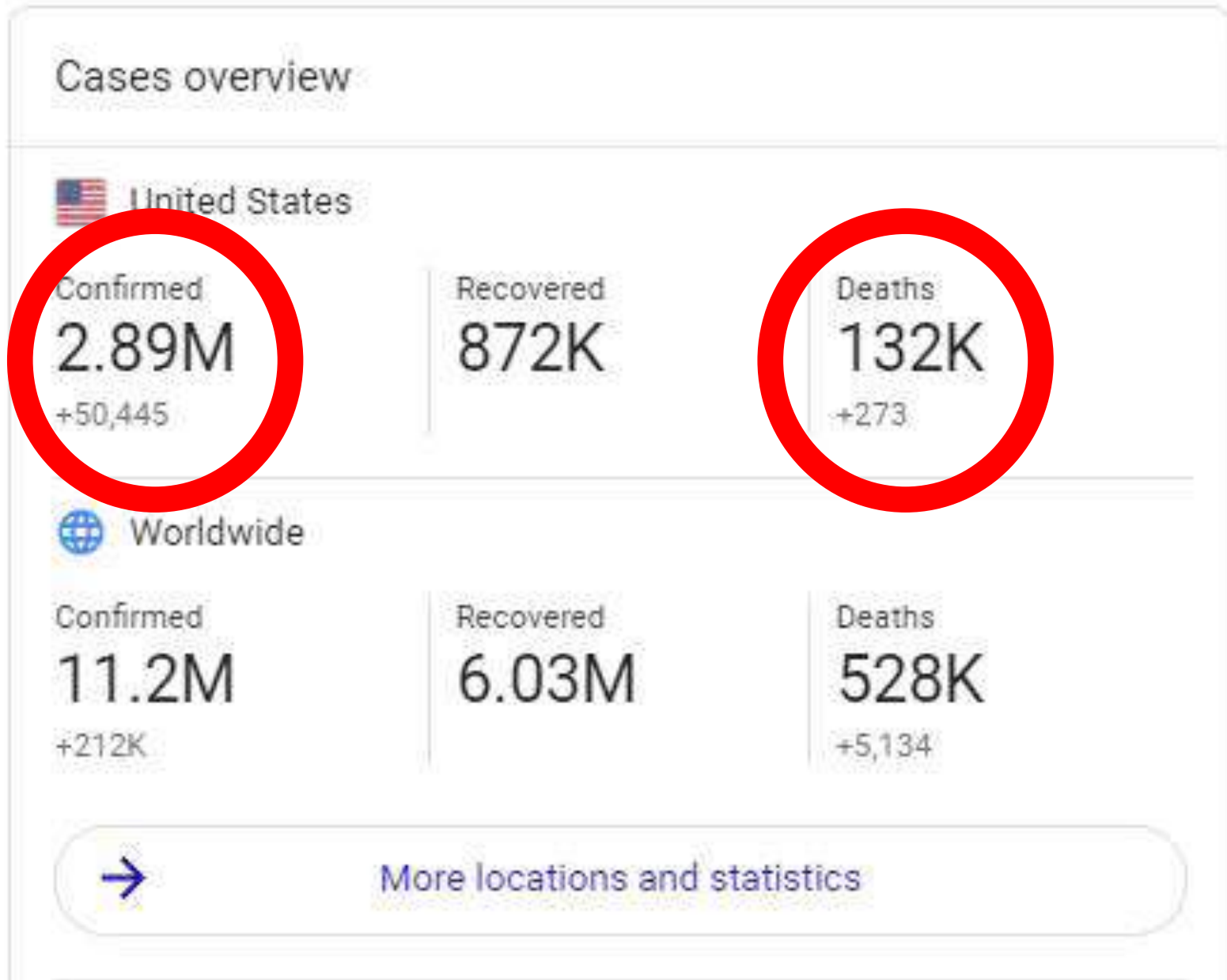
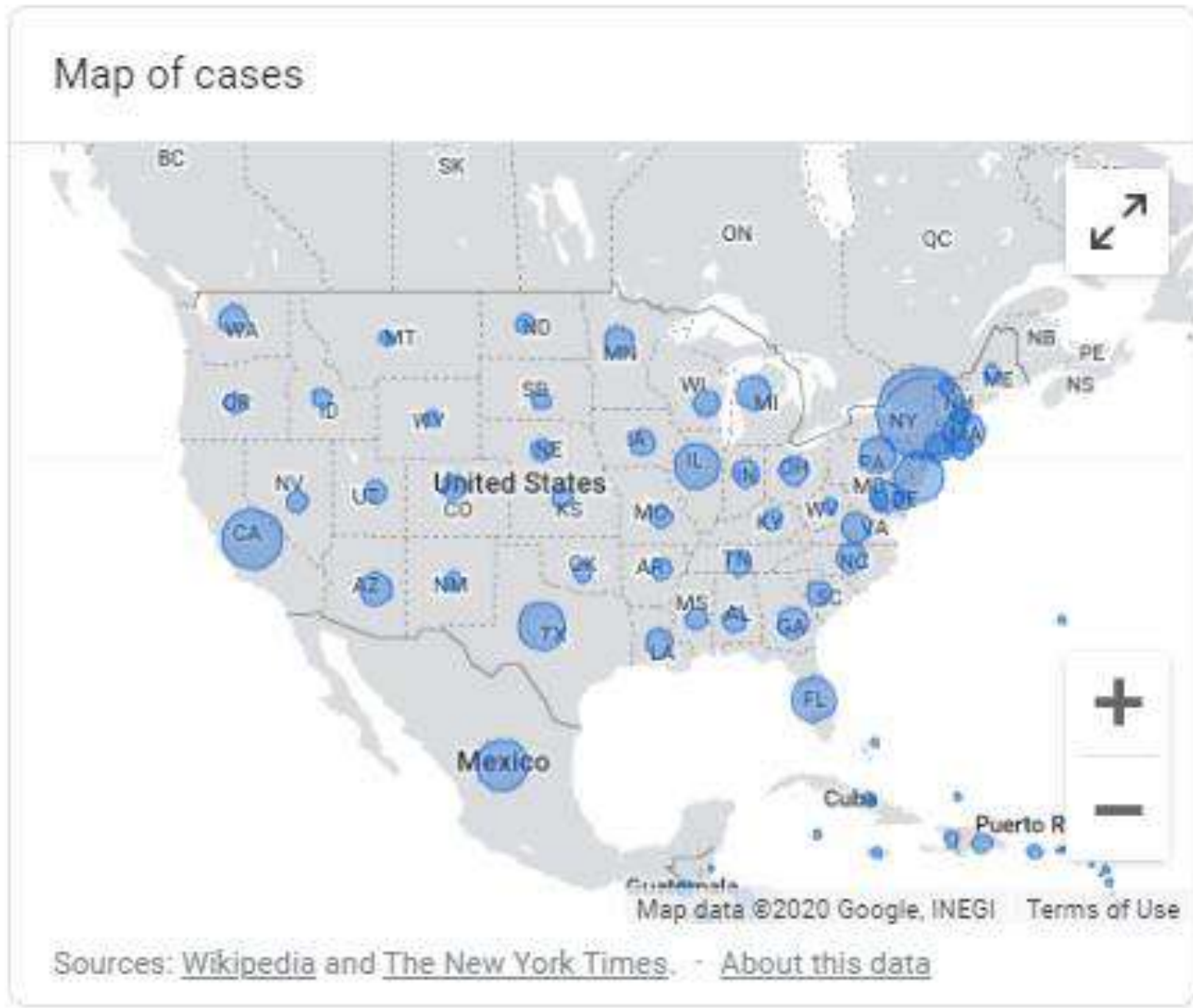
IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or 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.



**Webinar recording
available on our website:**

DestinationAnalysts.com/covid-webinars



REUTERS Business Markets World Politics TV More

HEALTH NEWS JULY 4, 2020 / 8:28 AM / UPDATED 14 HOURS AGO

Florida, Texas post daily COVID-19 records as 'positivity' rates climb

(Reuters) - Florida and Texas, two states that have emerged as the latest hot spots of the U.S. coronavirus outbreak, both reported record daily increases in confirmed COVID-19 cases on Saturday - with nearly 20,000 additional infections combined.



US & Canada

Coronavirus: Records broken at socially distanced hot dog contest

44 minutes ago

Coronavirus pandemic

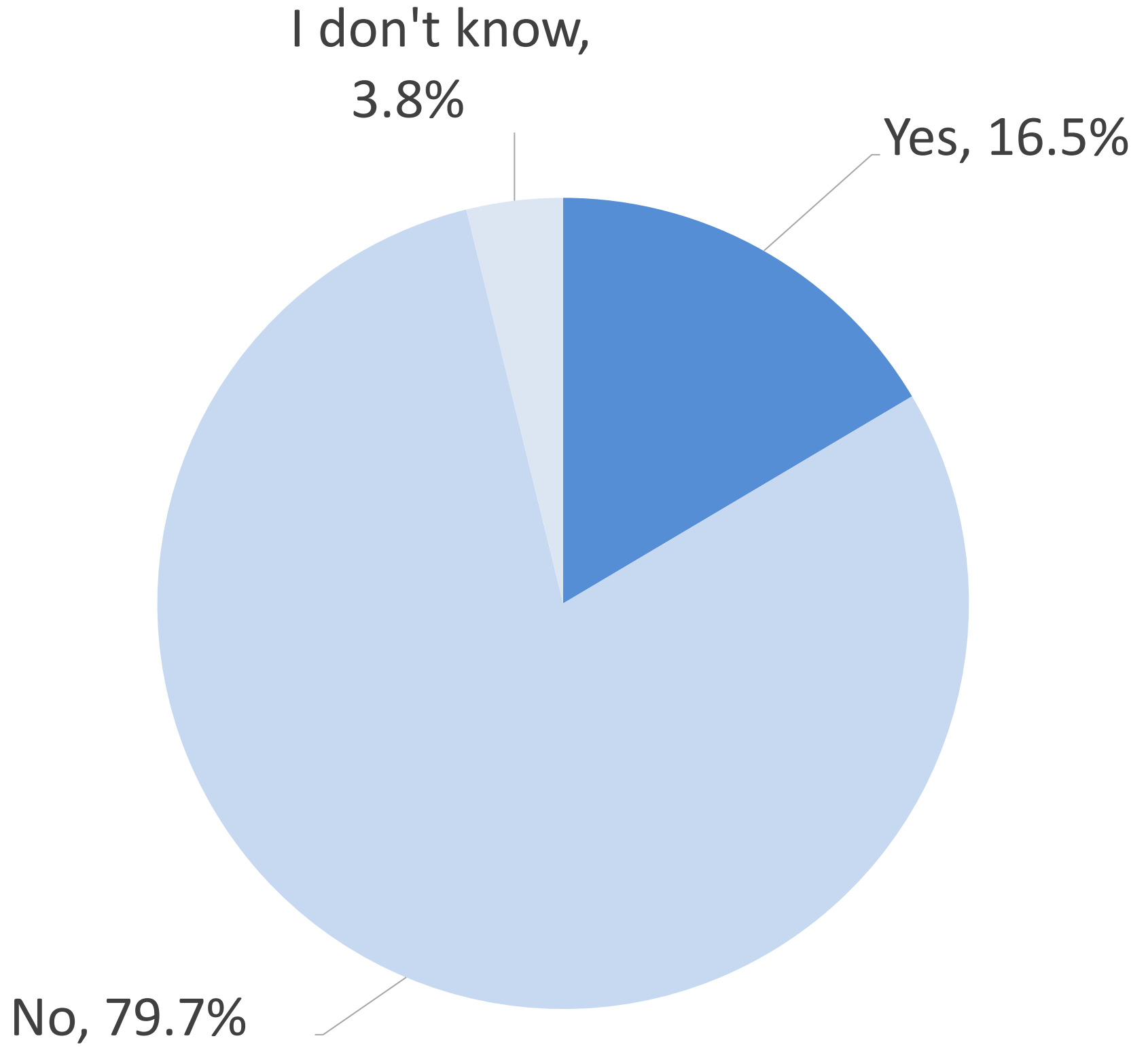


Coney Island in the US has hosted a special socially-distanced version of an annual hot dog eating contest amid the coronavirus pandemic.





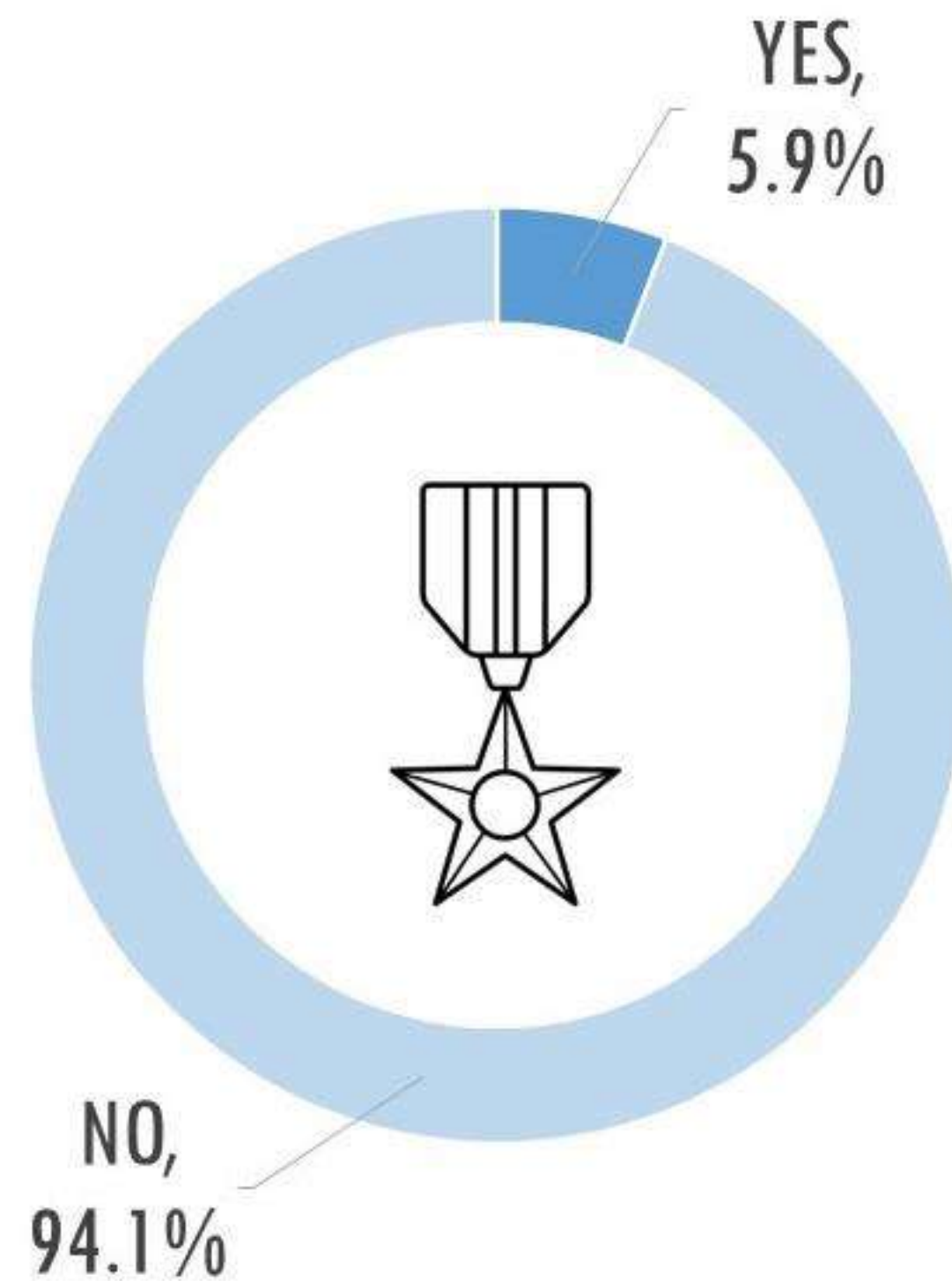
Question: Are you (or will you be) traveling during the Fourth of July holiday weekend?



(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

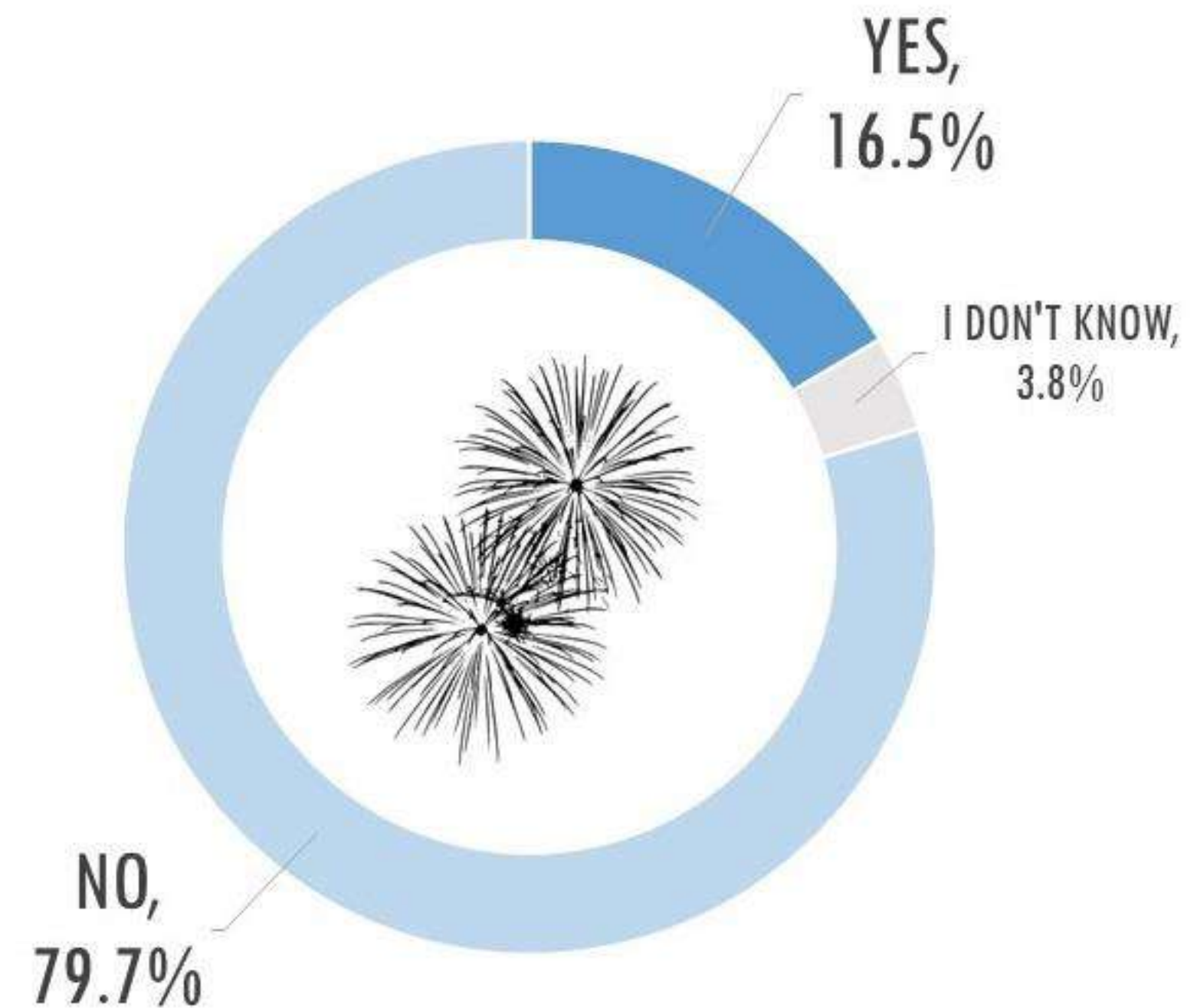
HOLIDAY TRAVEL DURING COVID-19: MEMORIAL DAY VS FOURTH OF JULY

Planned a Trip for Memorial Day Weekend



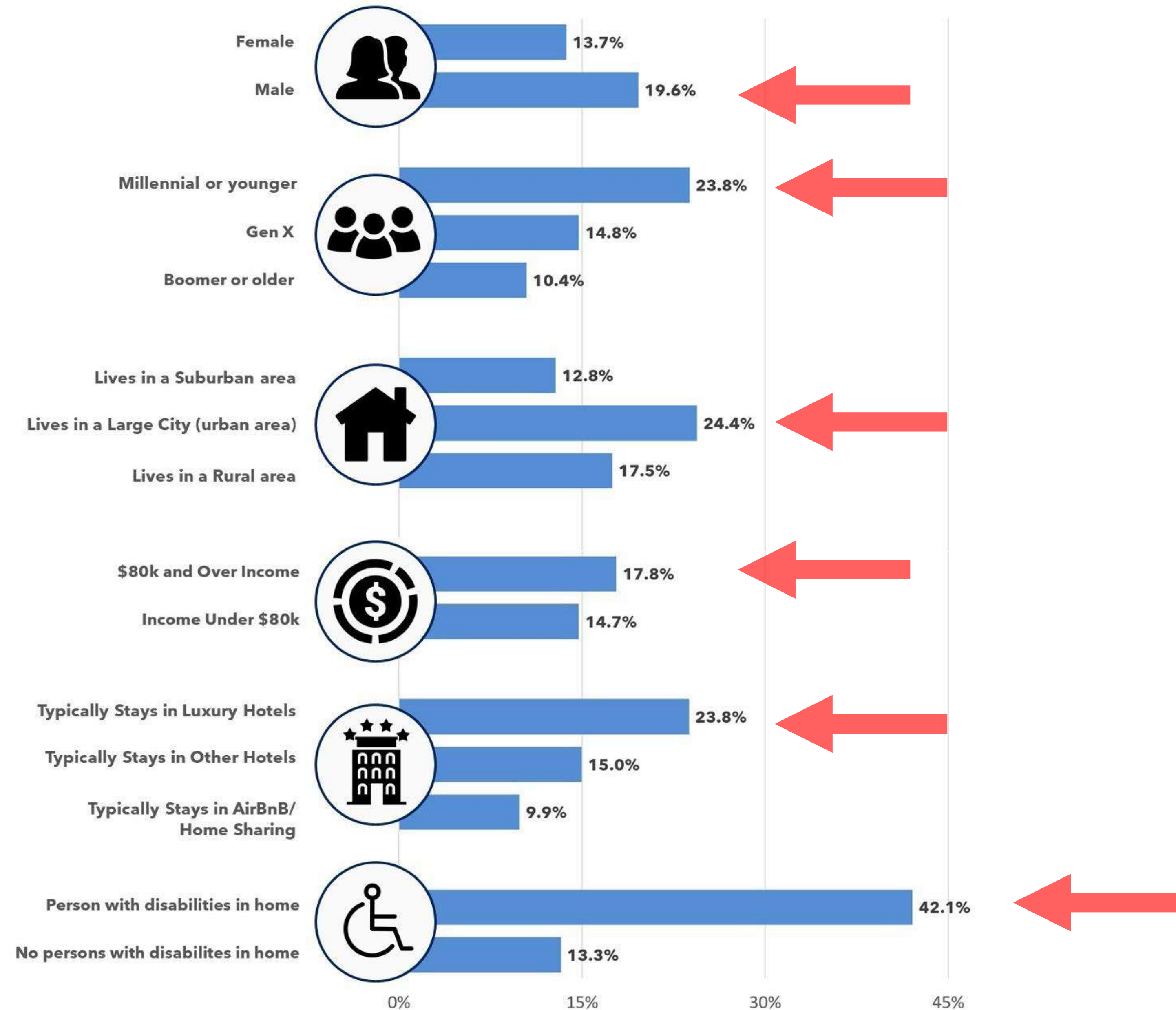
(Base: Wave 11. All respondents, 1,223 completed surveys. Data collected May 22-24, 2020)

Planned a Trip for Fourth of July Holiday Weekend



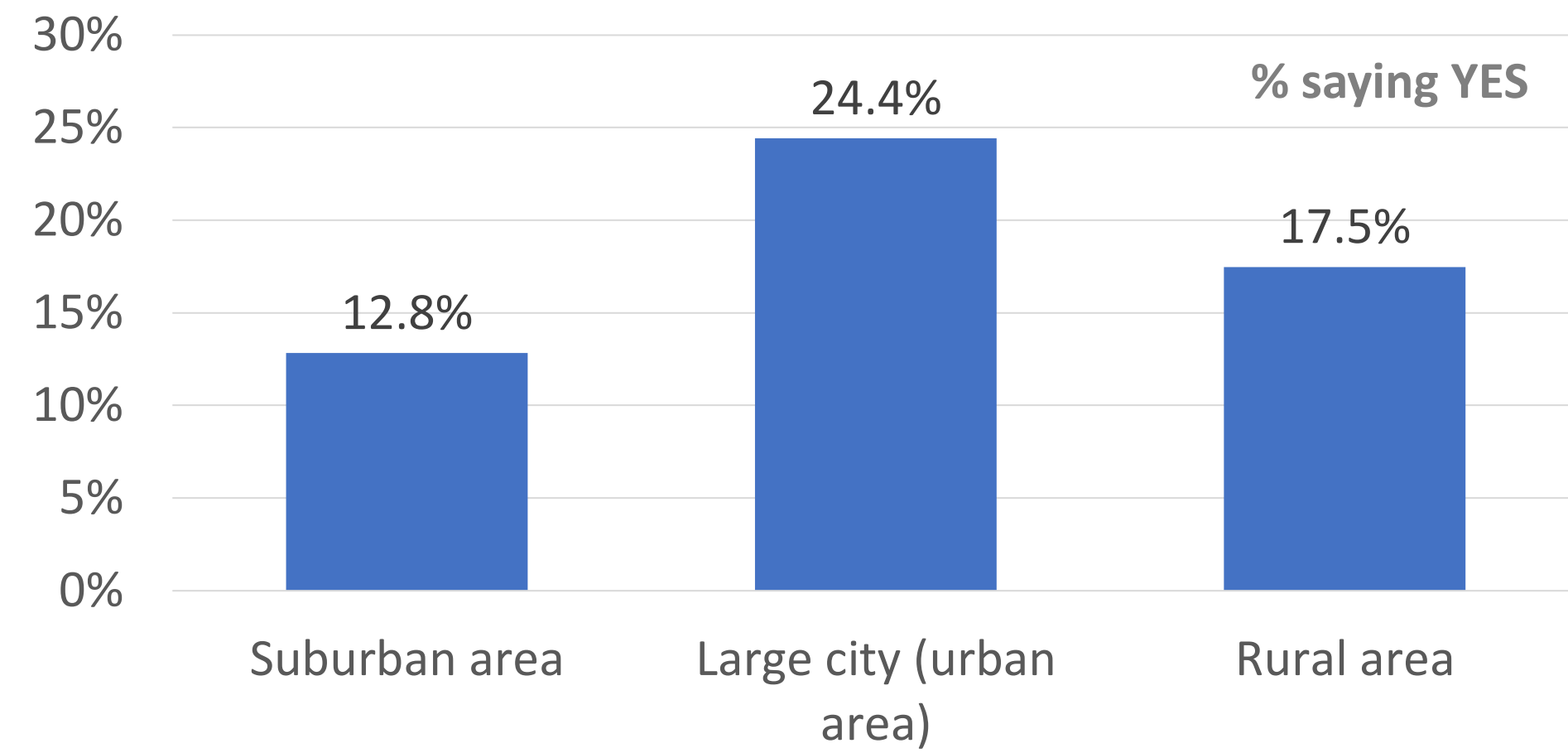
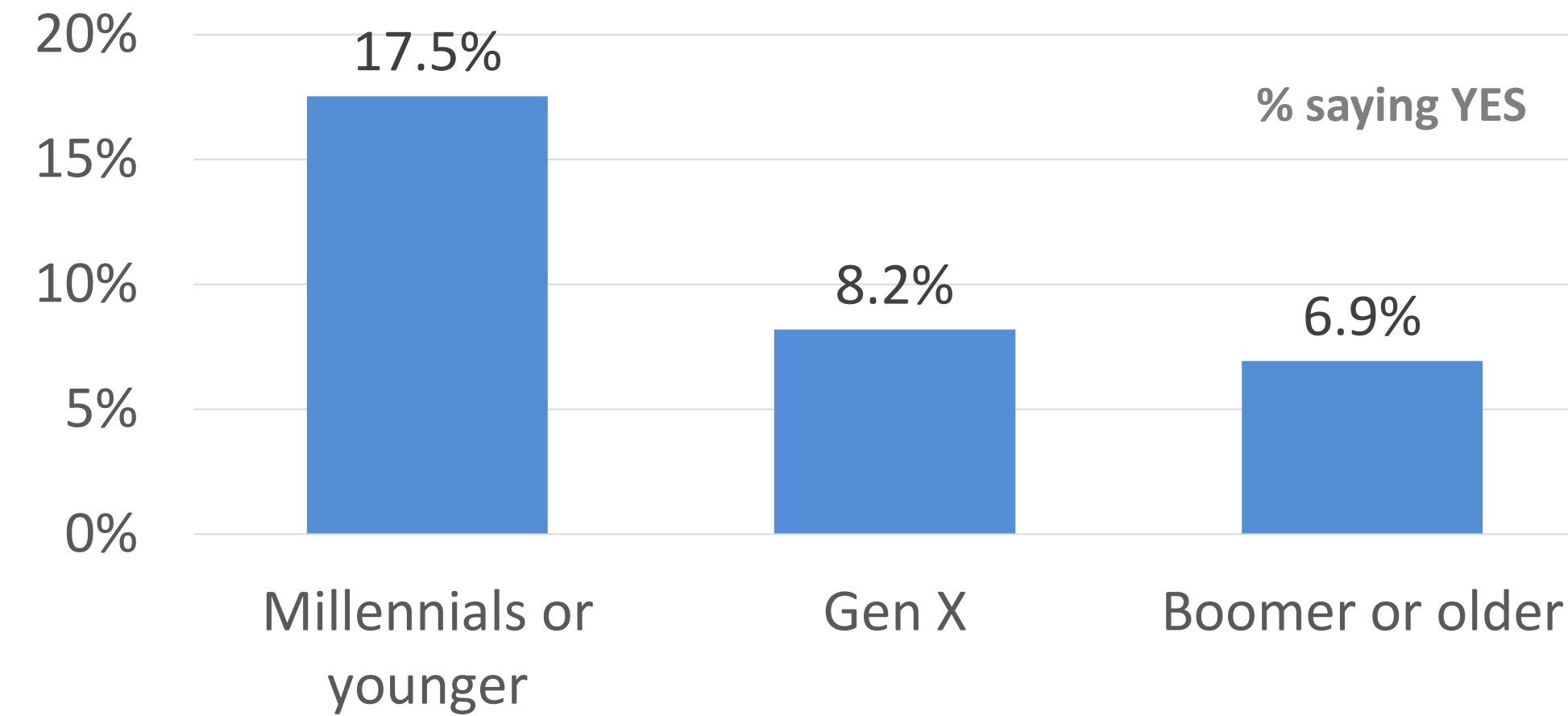
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

WHO TRAVELED FOR THE FOURTH OF JULY HOLIDAY



Travel on the Fourth of July Weekend

Question: Because of a physical, mental or emotional issue do you (or anyone you regularly travel with) have difficulties or face challenges traveling?





KEY TAKEAWAYS

- The percent of Americans who took a trip for the Fourth of July holiday is more than double Memorial Day (16.5% vs 5.9%)
- The profile of these holiday travelers—younger, male, urban, affluent—may offer clues to travel's near-term

A white wooden lifeguard stand is positioned on a sandy beach. The backrest of the stand features a prominent red cross. The stand is situated on the left side of the frame, with its shadow cast onto the sand. In the foreground, a red and white striped beach umbrella is partially visible. The background consists of a clear blue sky and a vibrant turquoise ocean that meets the shore. The overall scene is bright and sunny, suggesting a clear day at the beach.

How Safe We Feel to Travel

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

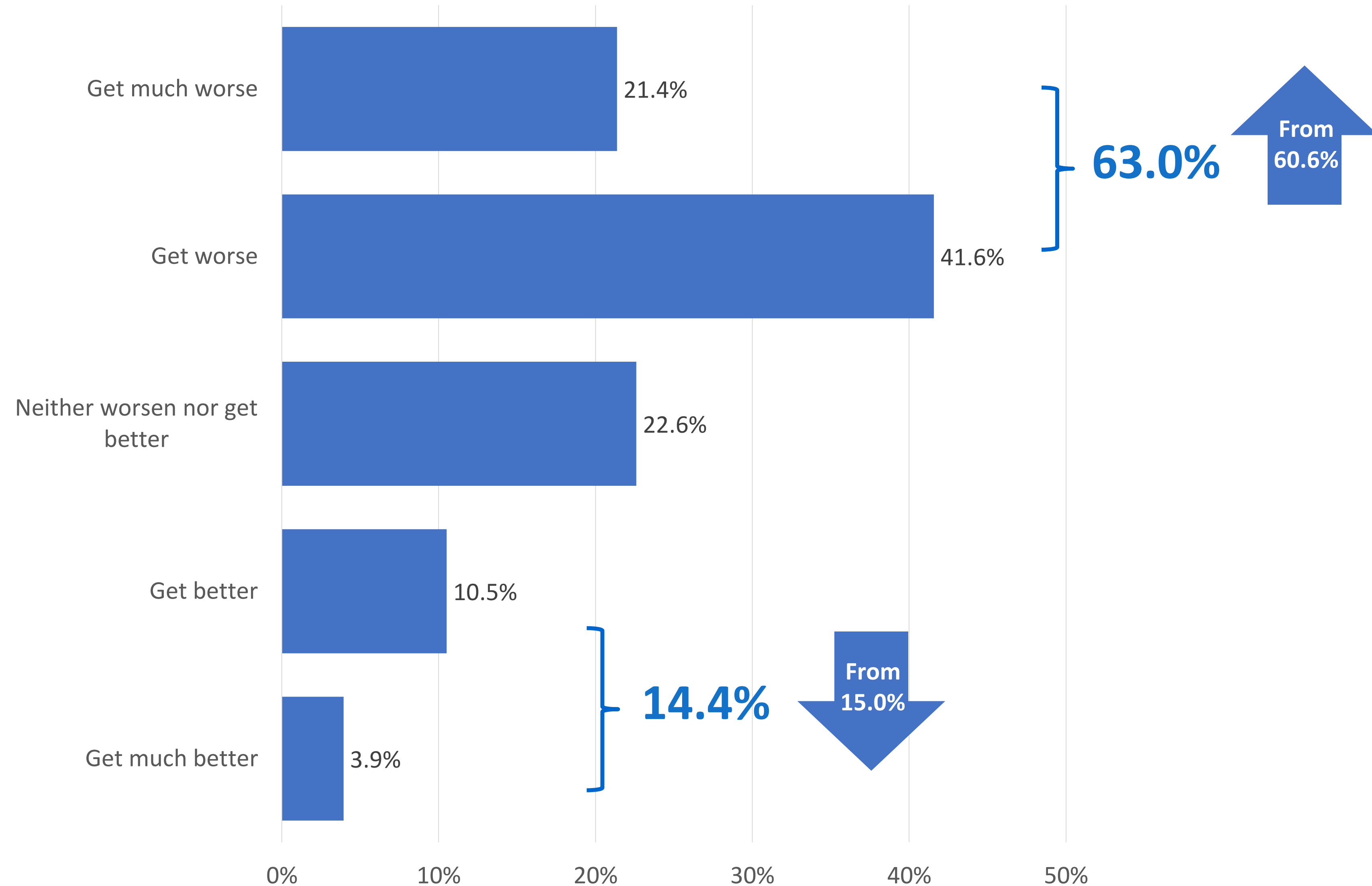


Expectations for the Coronavirus Outbreak

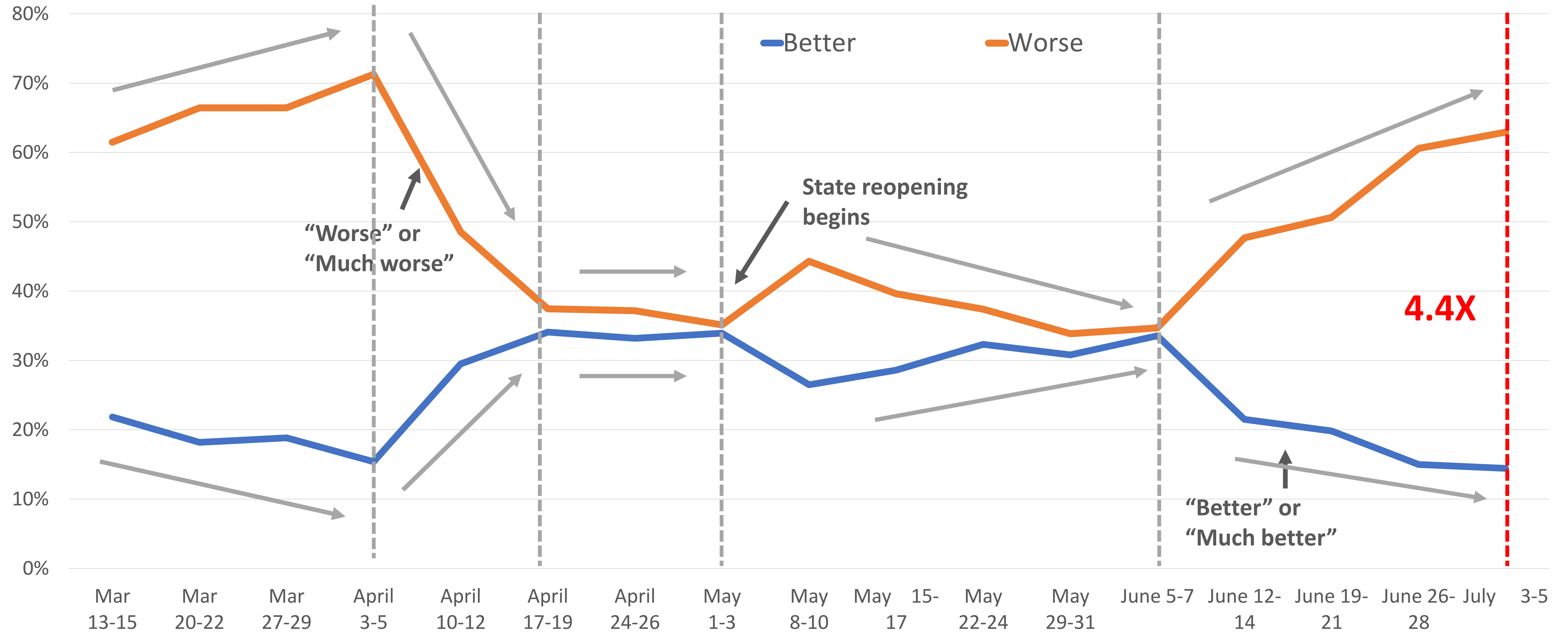
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

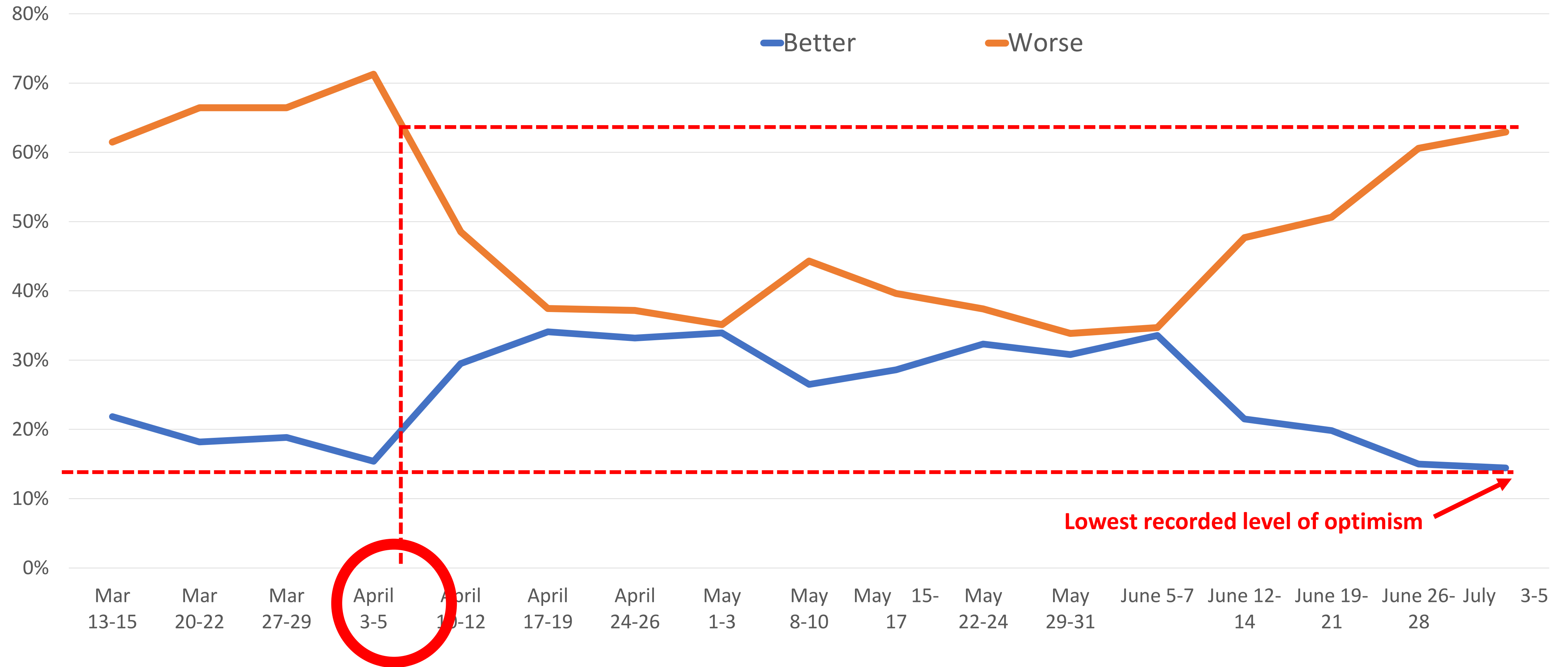
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Expectations for the Coronavirus Outbreak



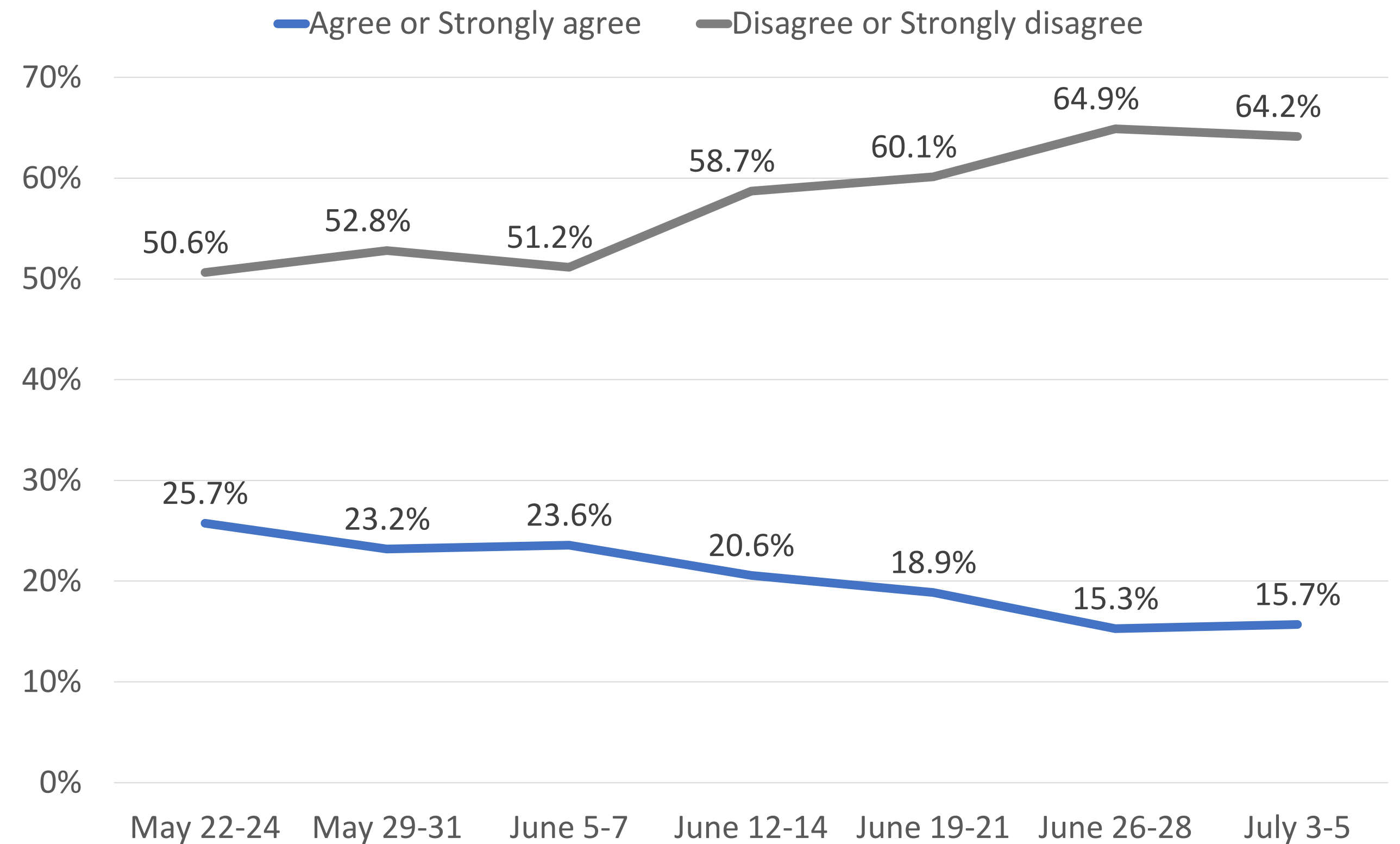
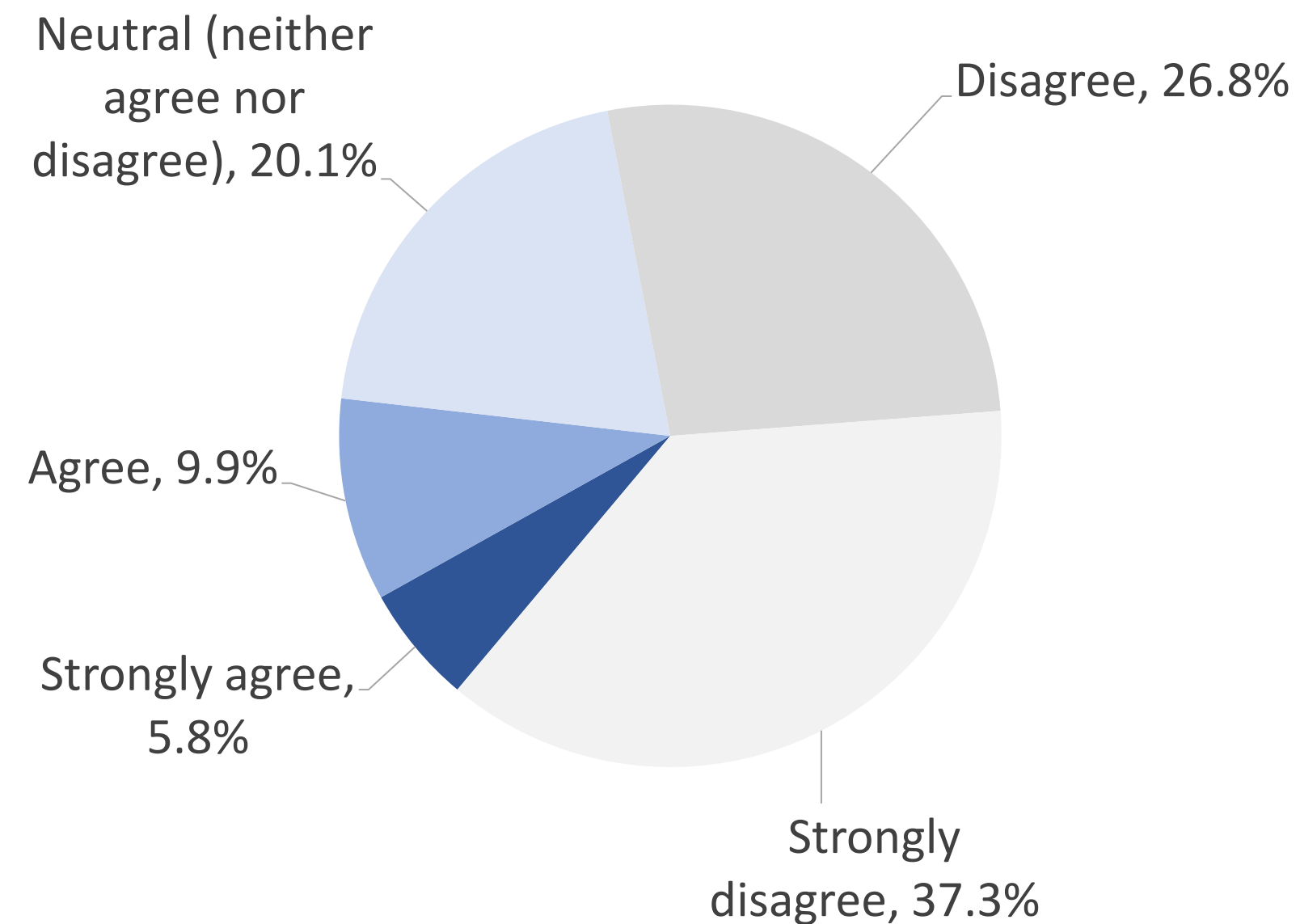
Expectations for the Coronavirus Outbreak



Expectations for Fall Travel Season

How much do you agree with the following statement?

Statement: I expect the coronavirus situation will be resolved before Fall begins.

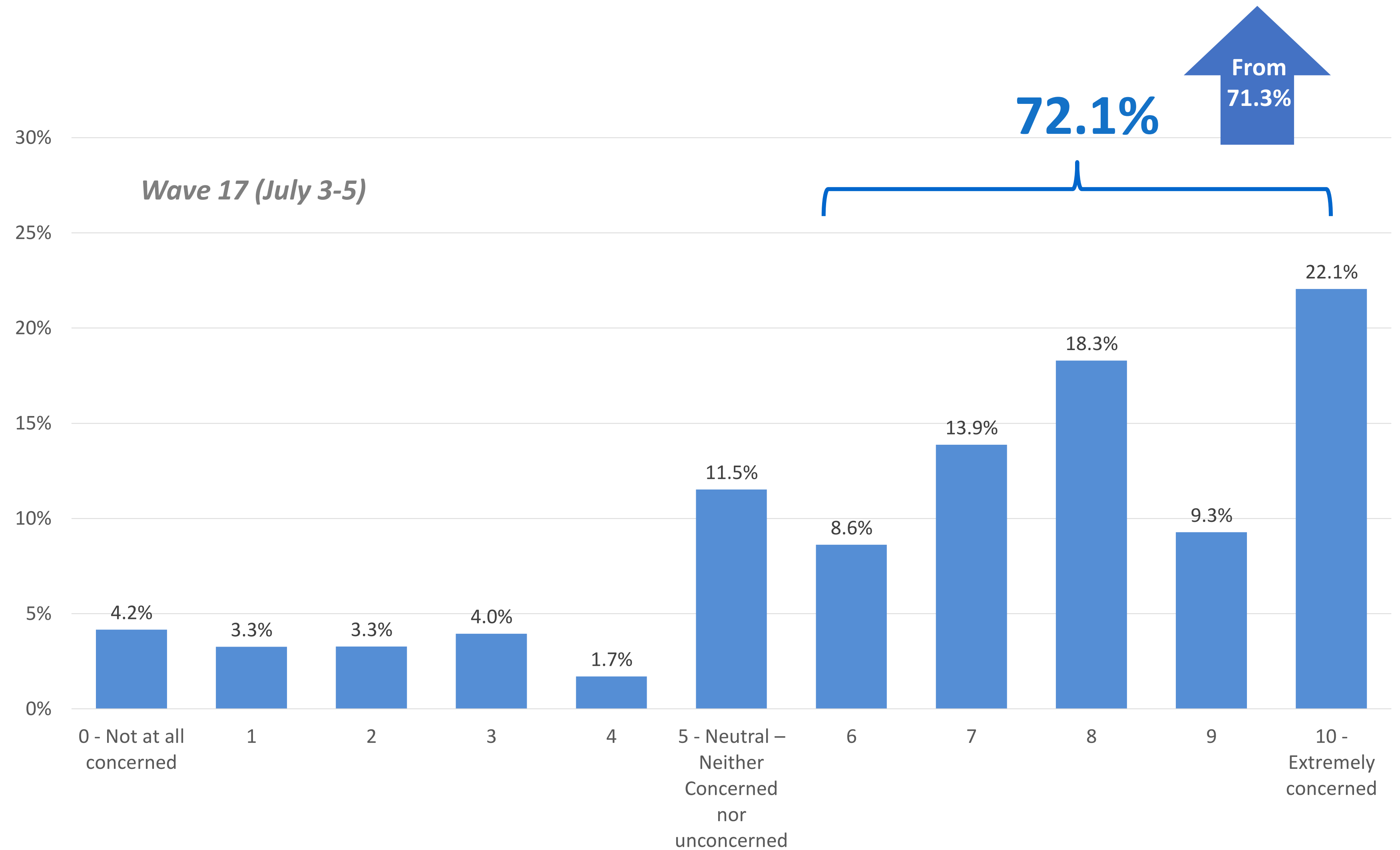


(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Personal Health Concerns

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

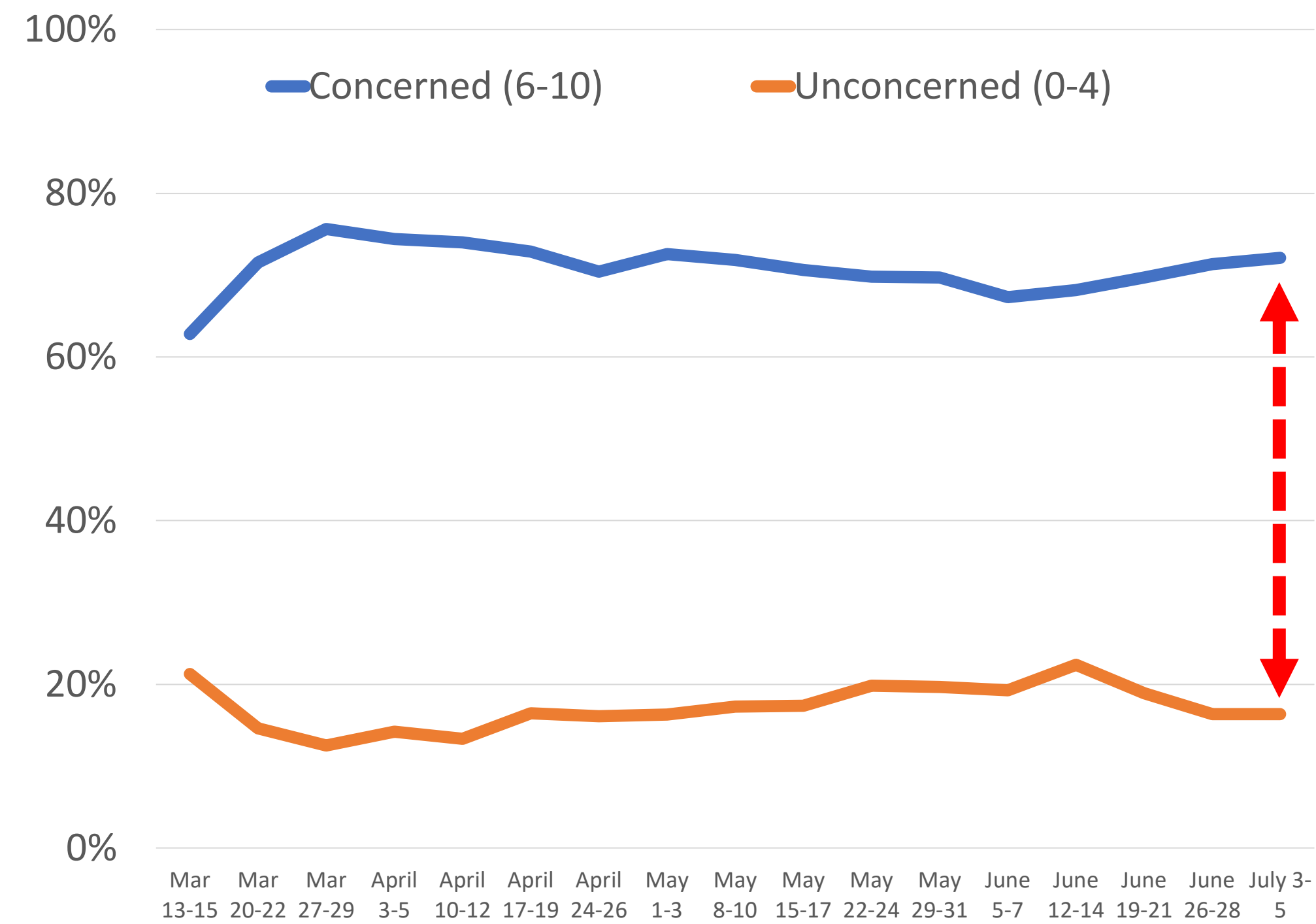
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Personal Safety Perceptions: Time Series

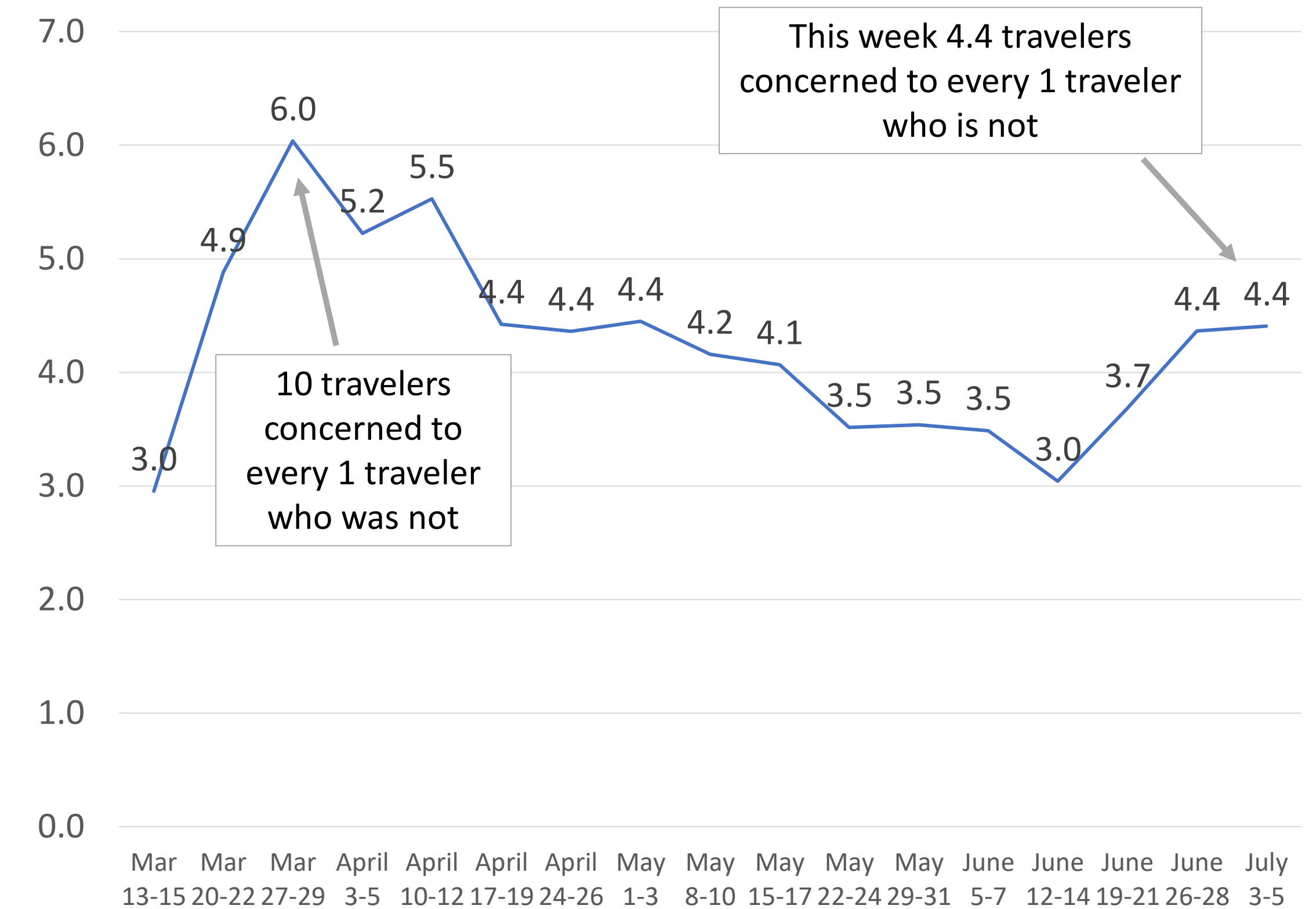
Personal Safety

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Personal Safety

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

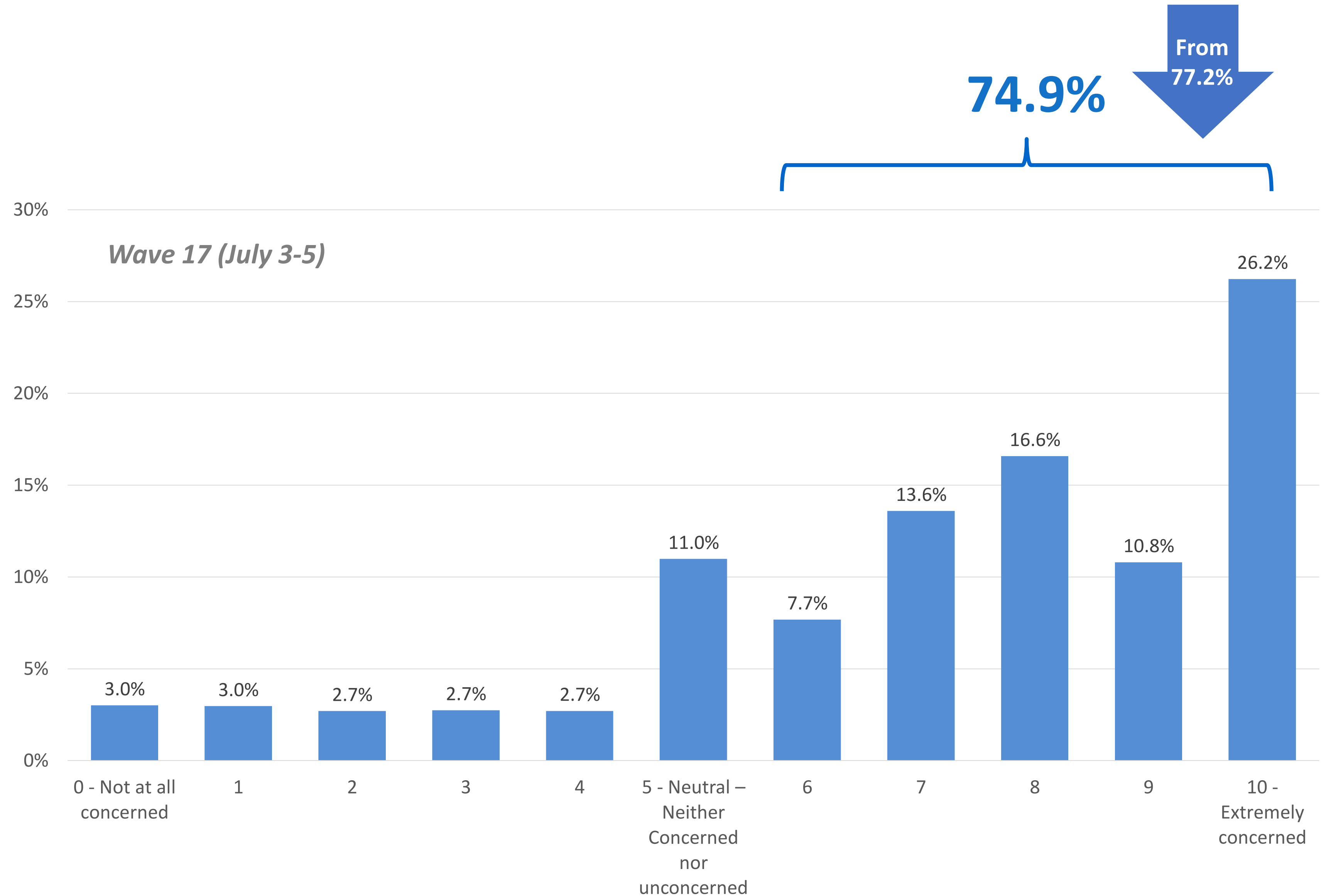


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Health Concerns (Family & Friends)

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

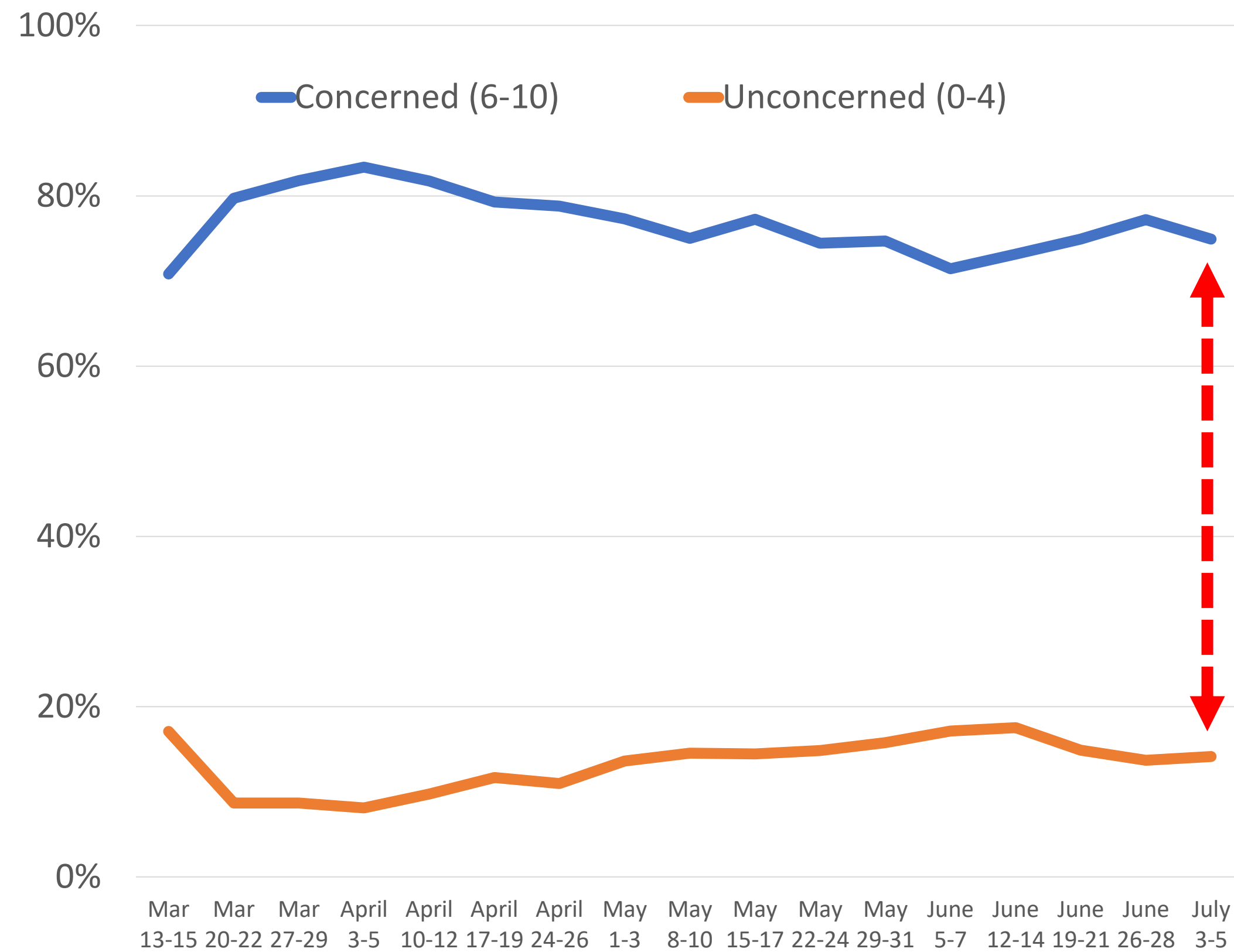
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Friends & Family Safety Perceptions: Time Series

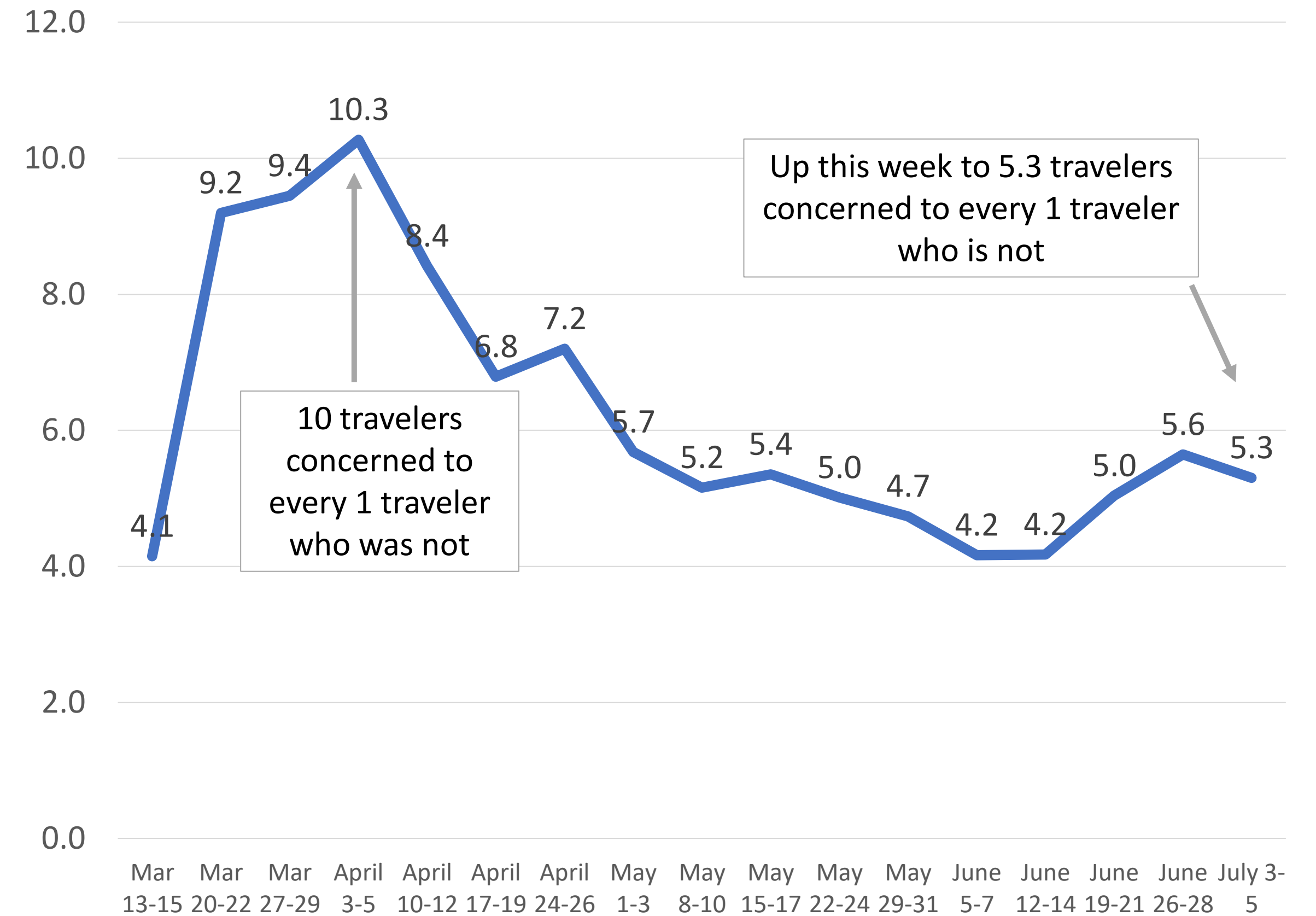
Safety of Friends and Relatives

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Safety of Friends and Relatives

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

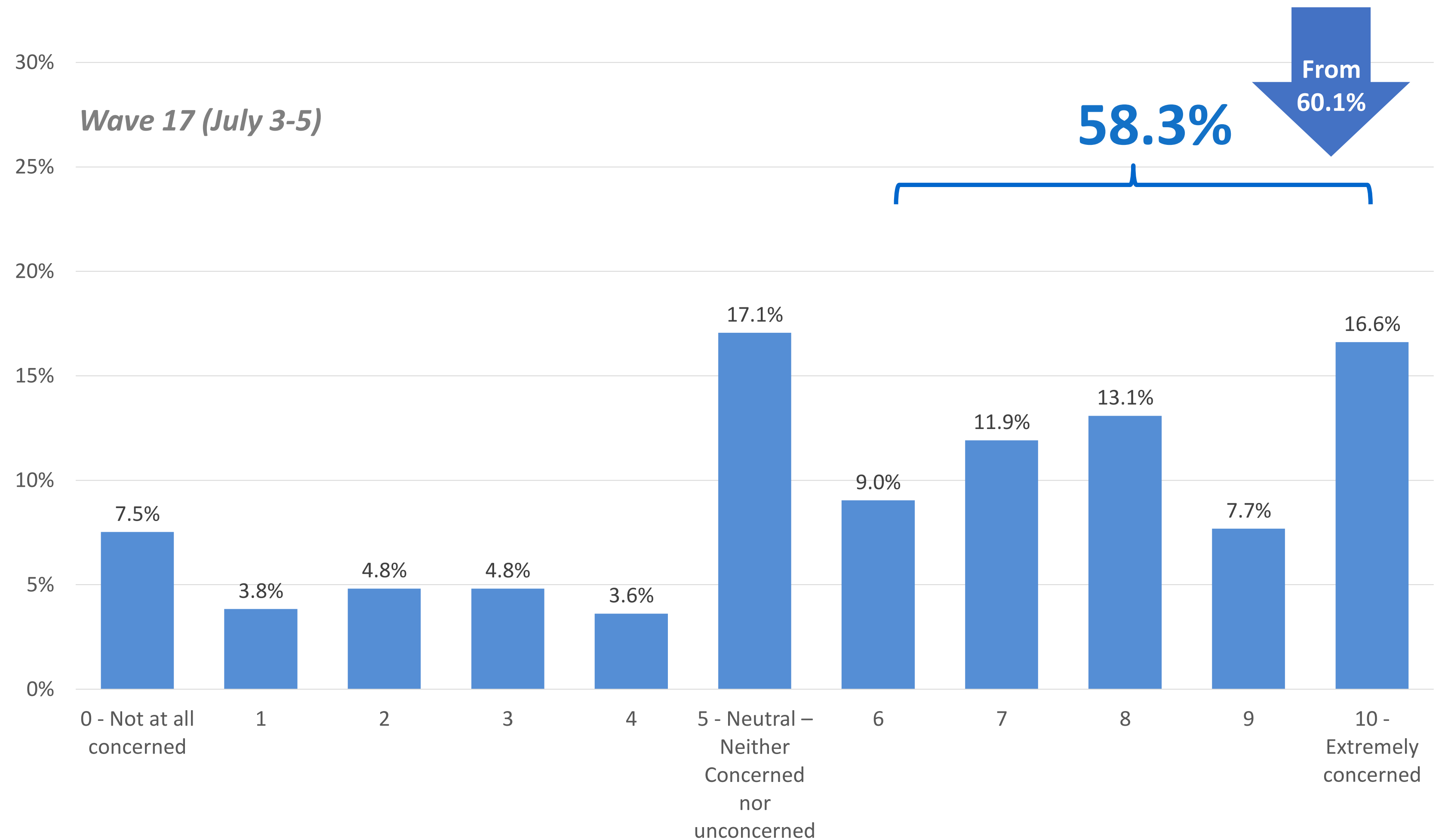


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Concerns About Personal Finances

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

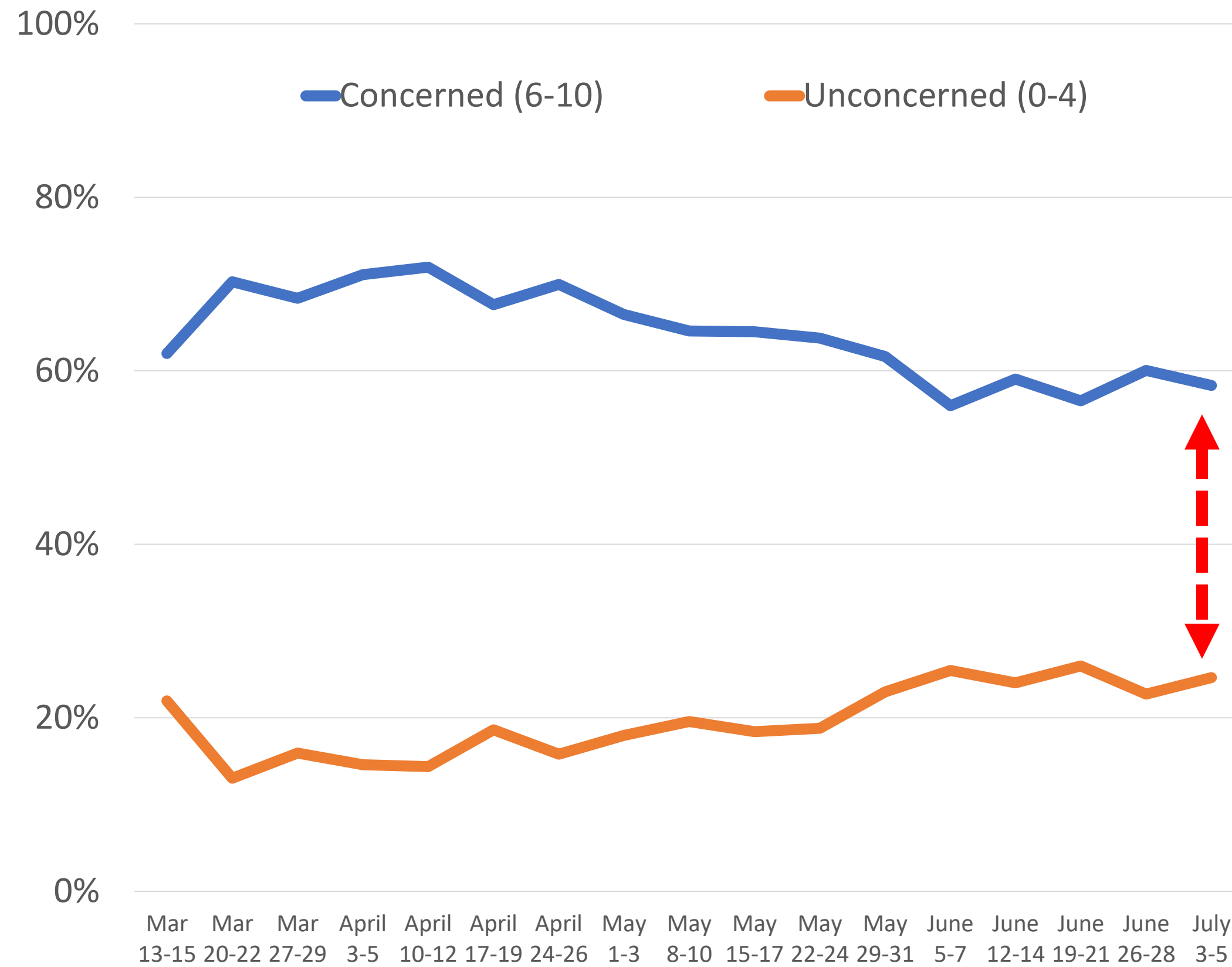
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Concern About Personal Finances: Time Series

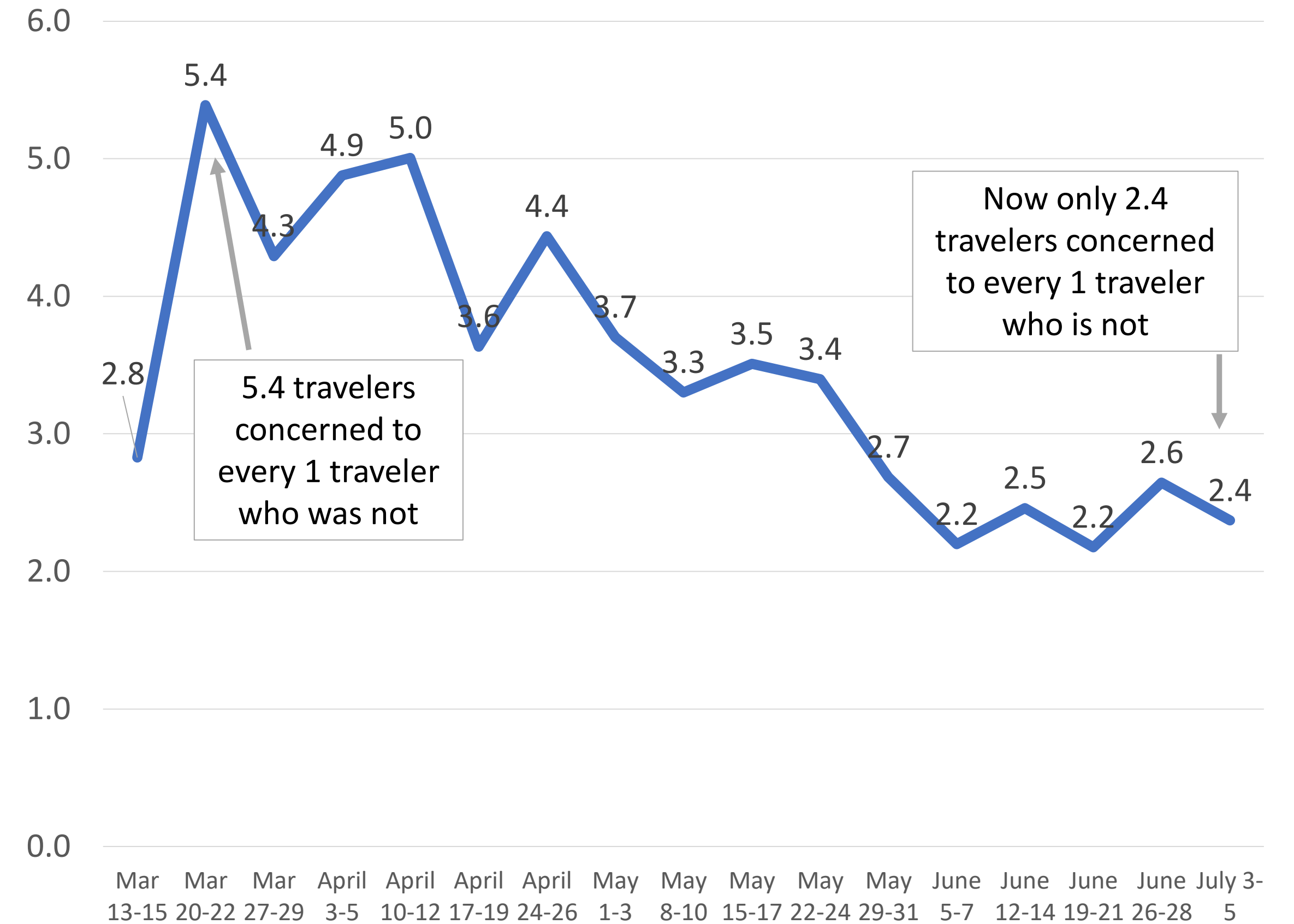
Personal Finances

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Personal Finances

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

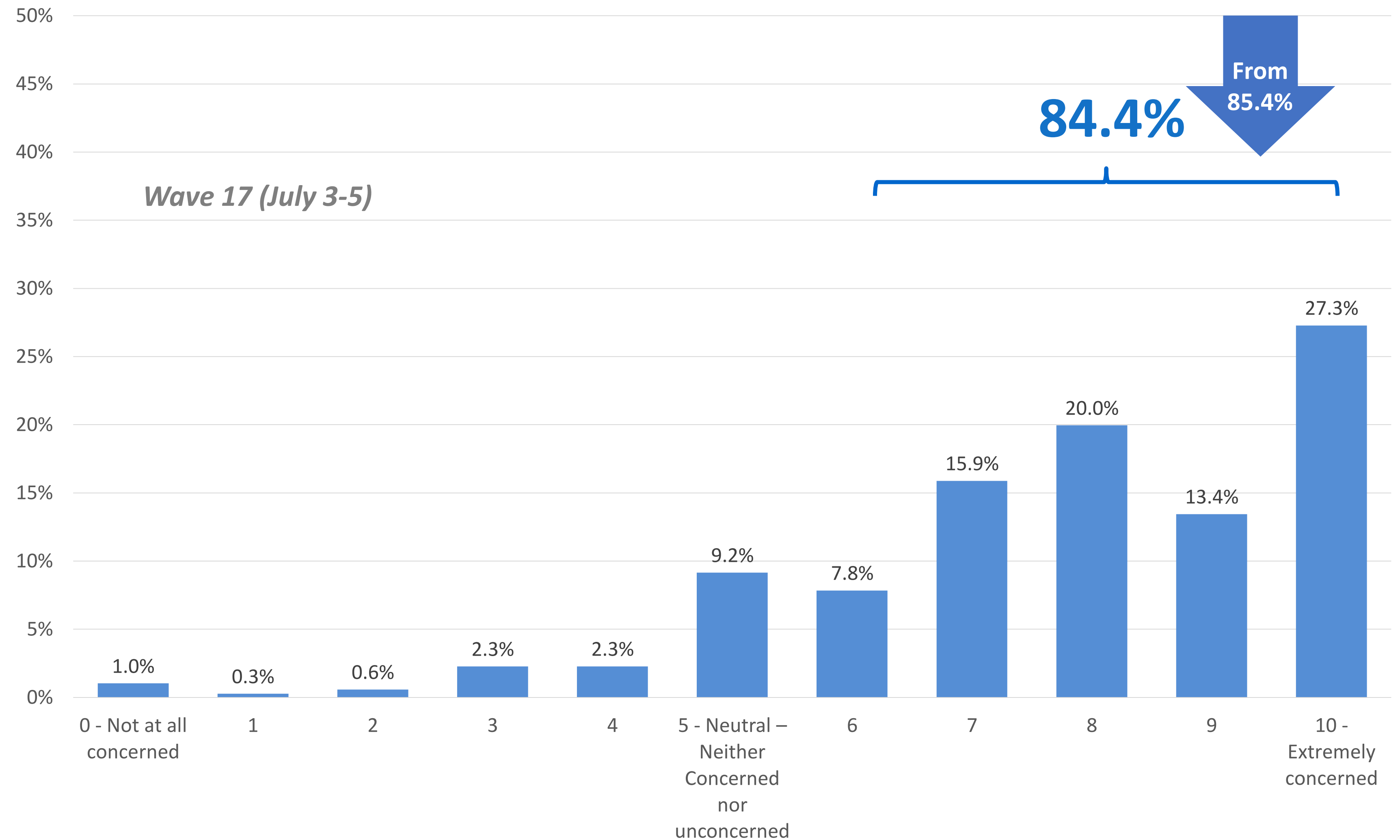


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Concerns About National Economy

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

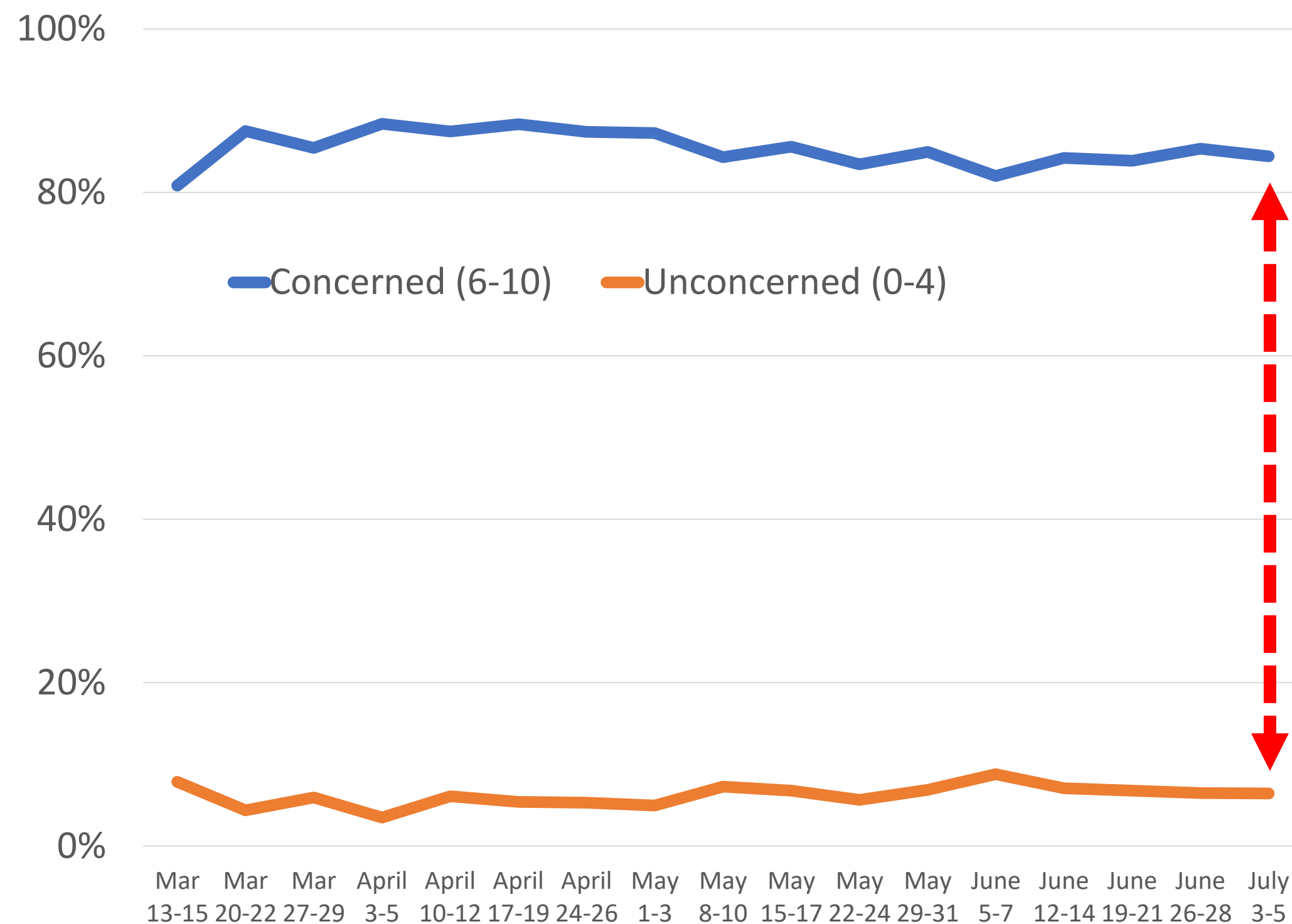
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Concern About National Economy: Time Series

National Economy

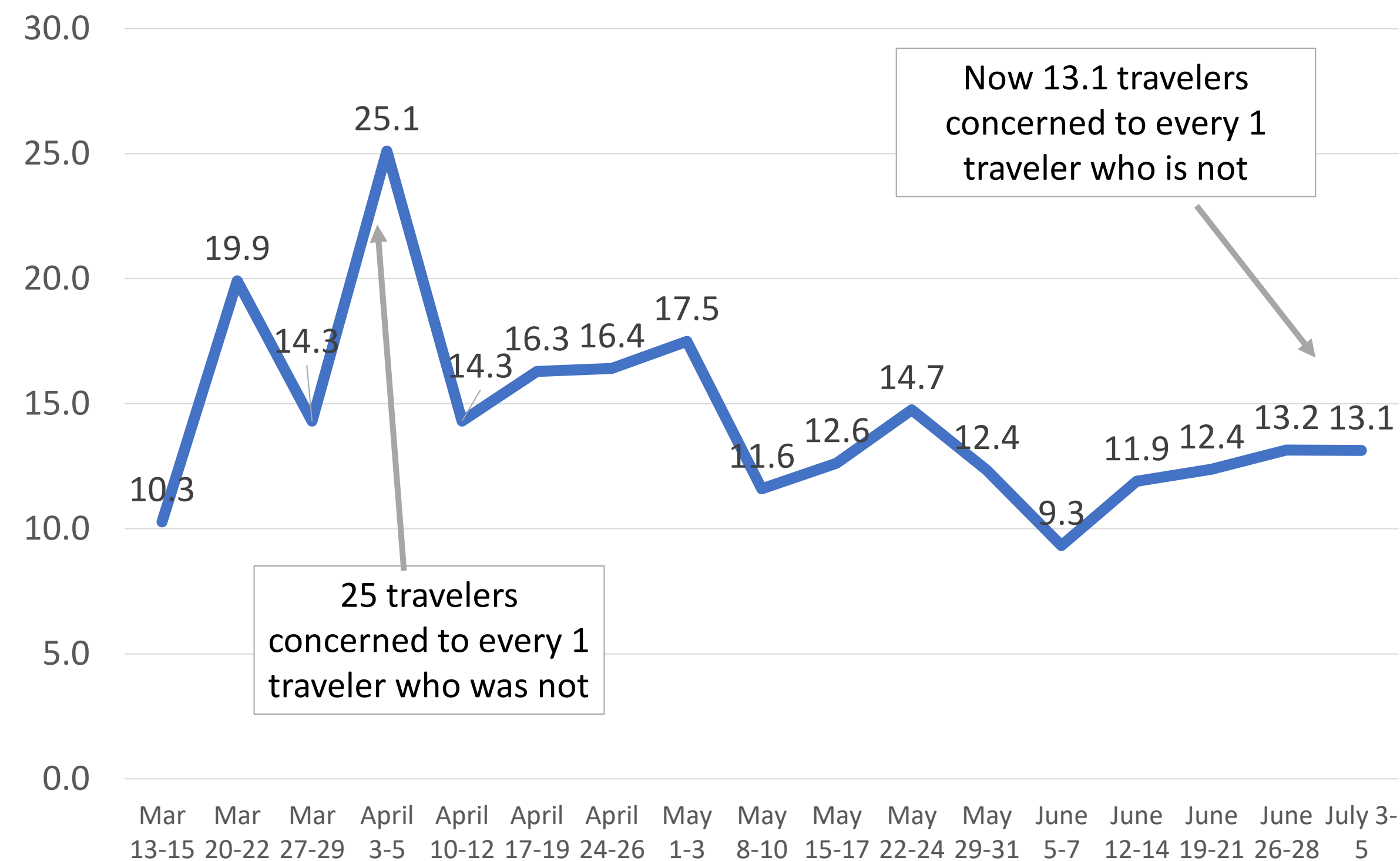
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES? (Please answer using the scale below)

National Economy

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



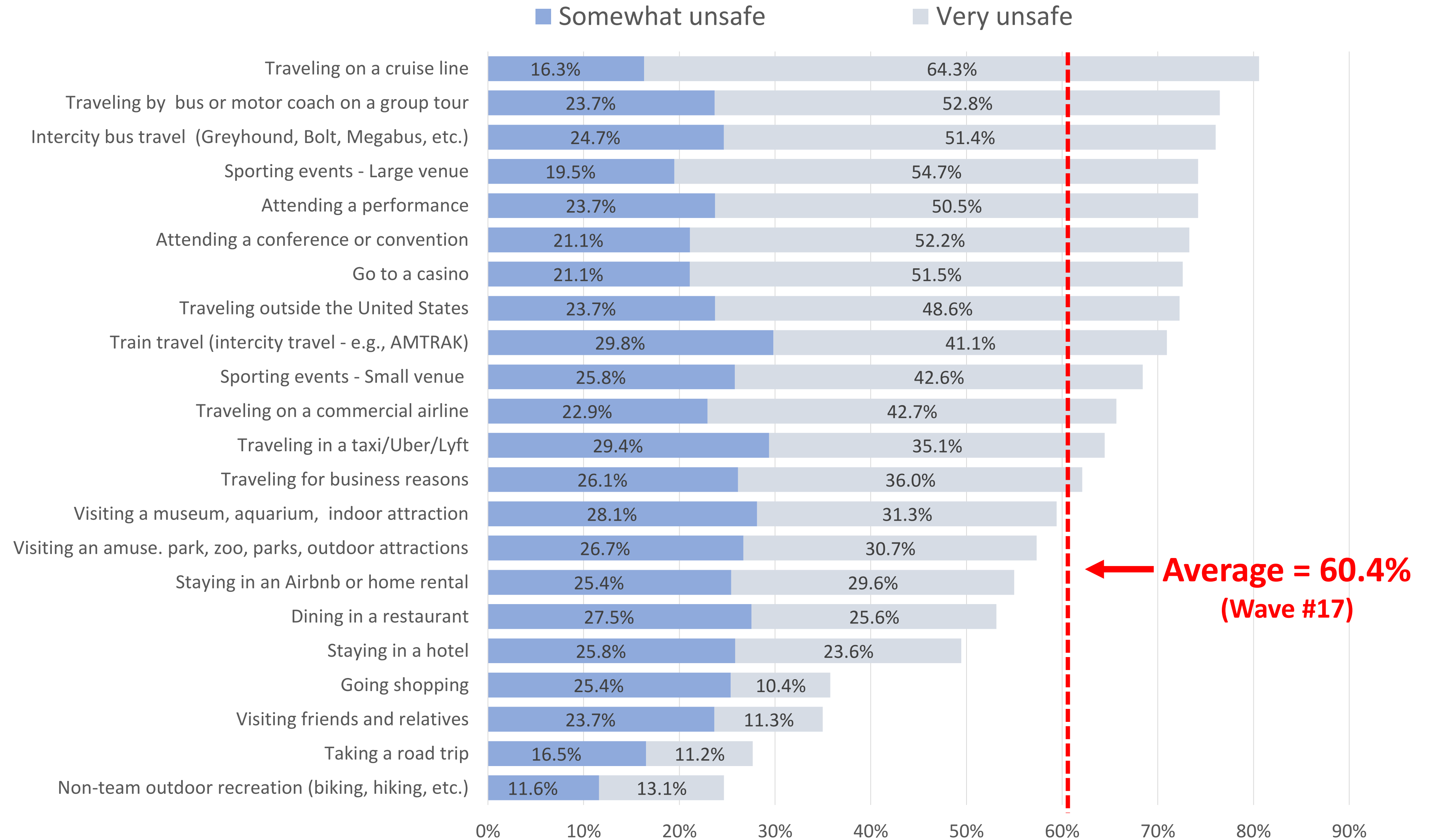
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY? (Please answer using the scale below)

(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)

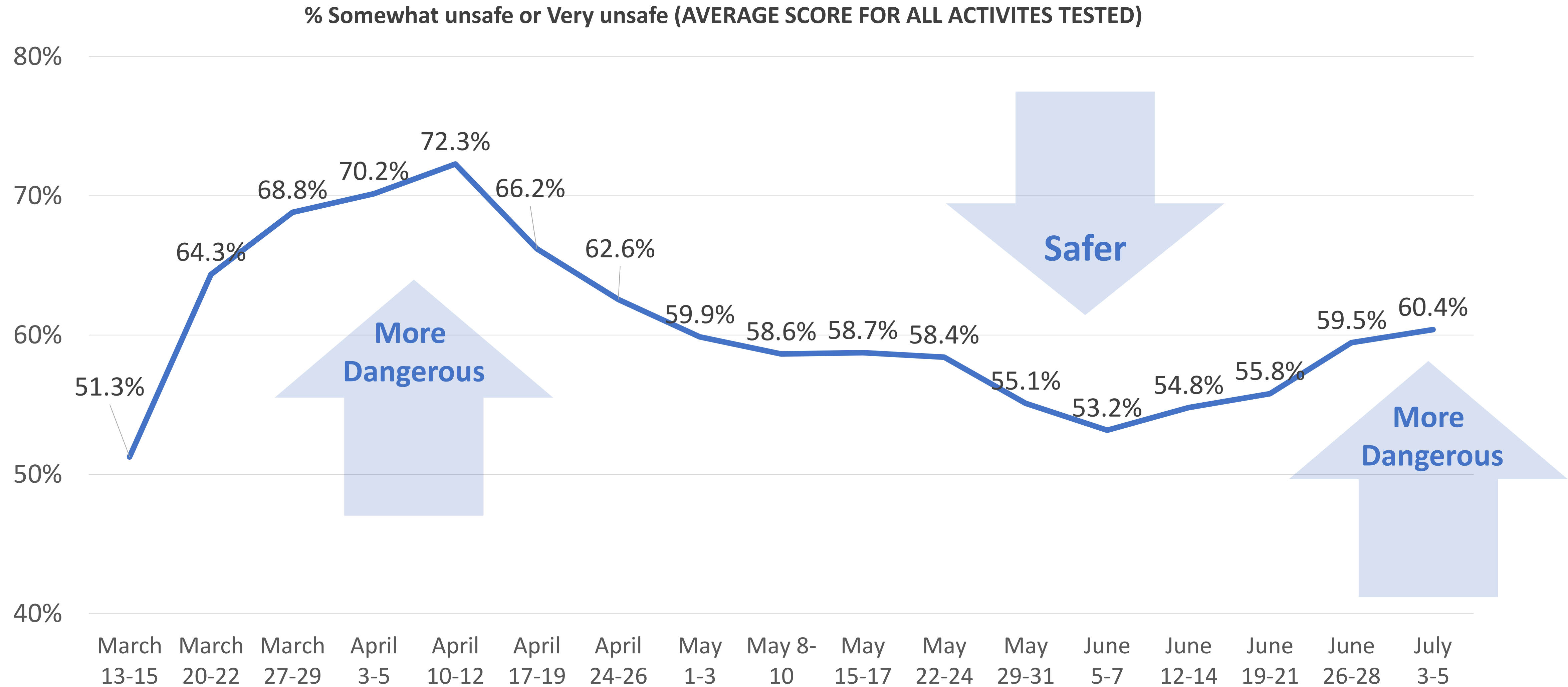
Perceived Safety of Travel Activities (Wave 17)

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

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Perceived Safety of Travel Activities (Waves 1-17 Comparison)



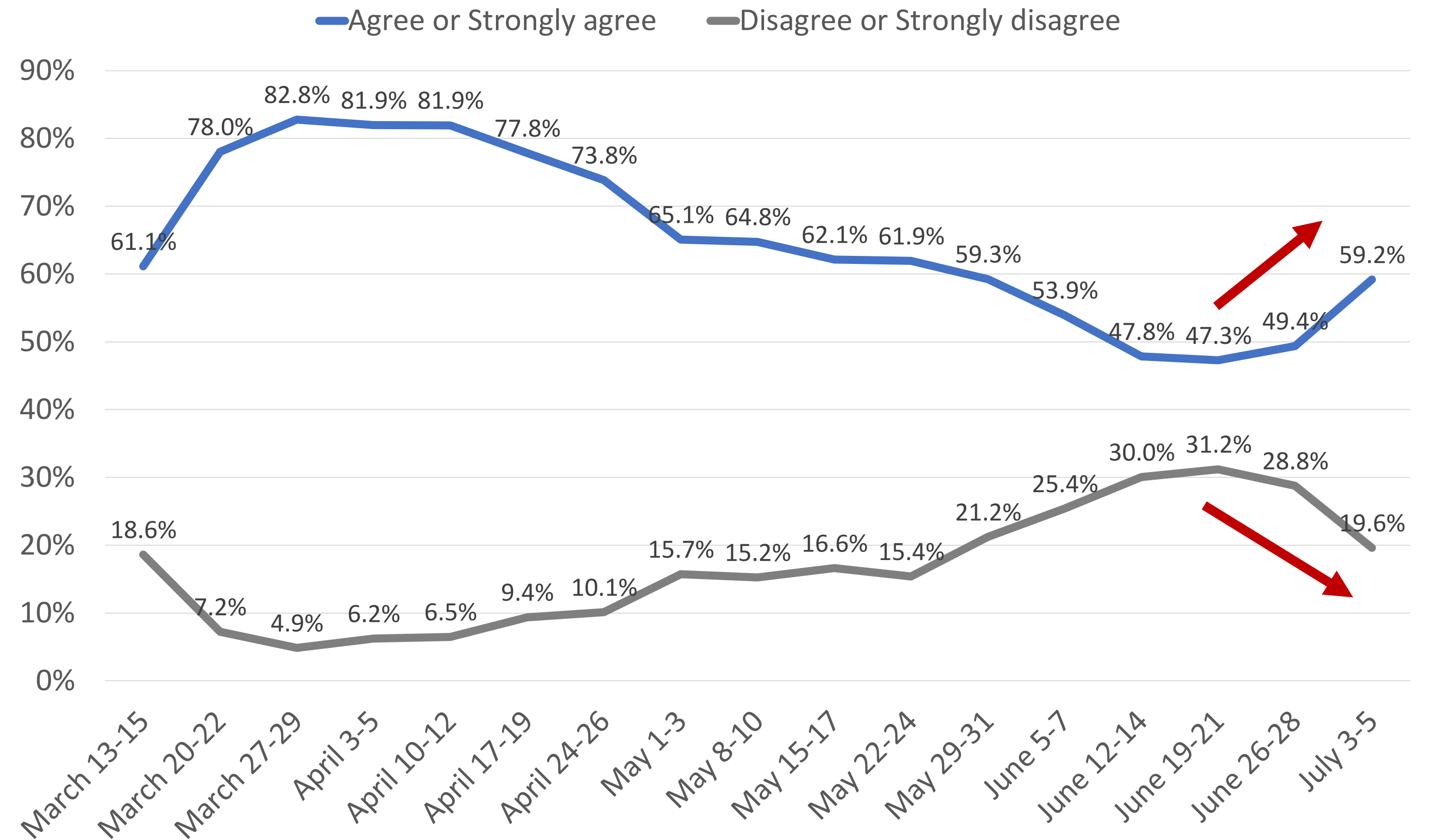
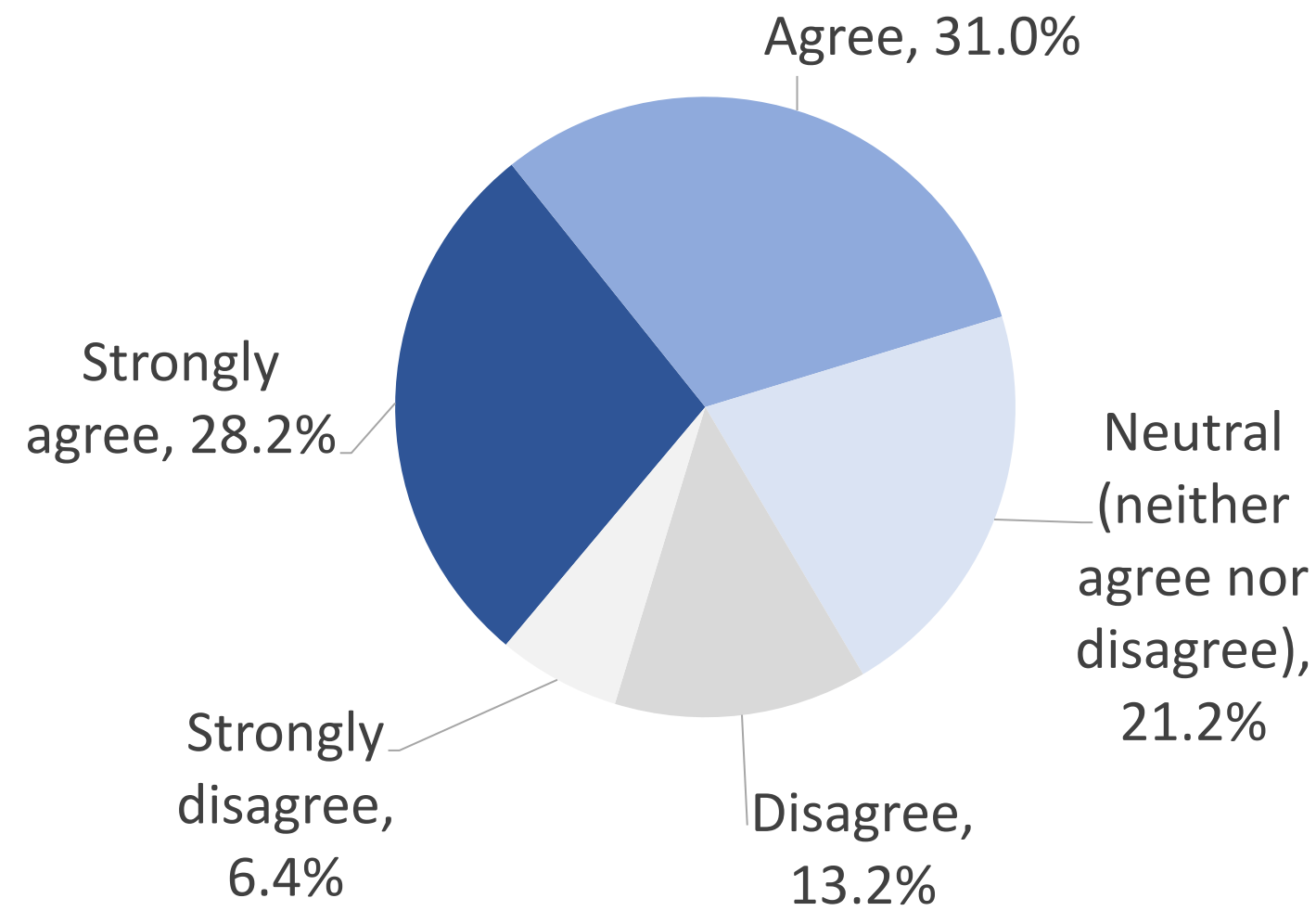
Question: At this moment, how safe would you feel doing each type of travel activity?

(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)

Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the coronavirus situation blows over.

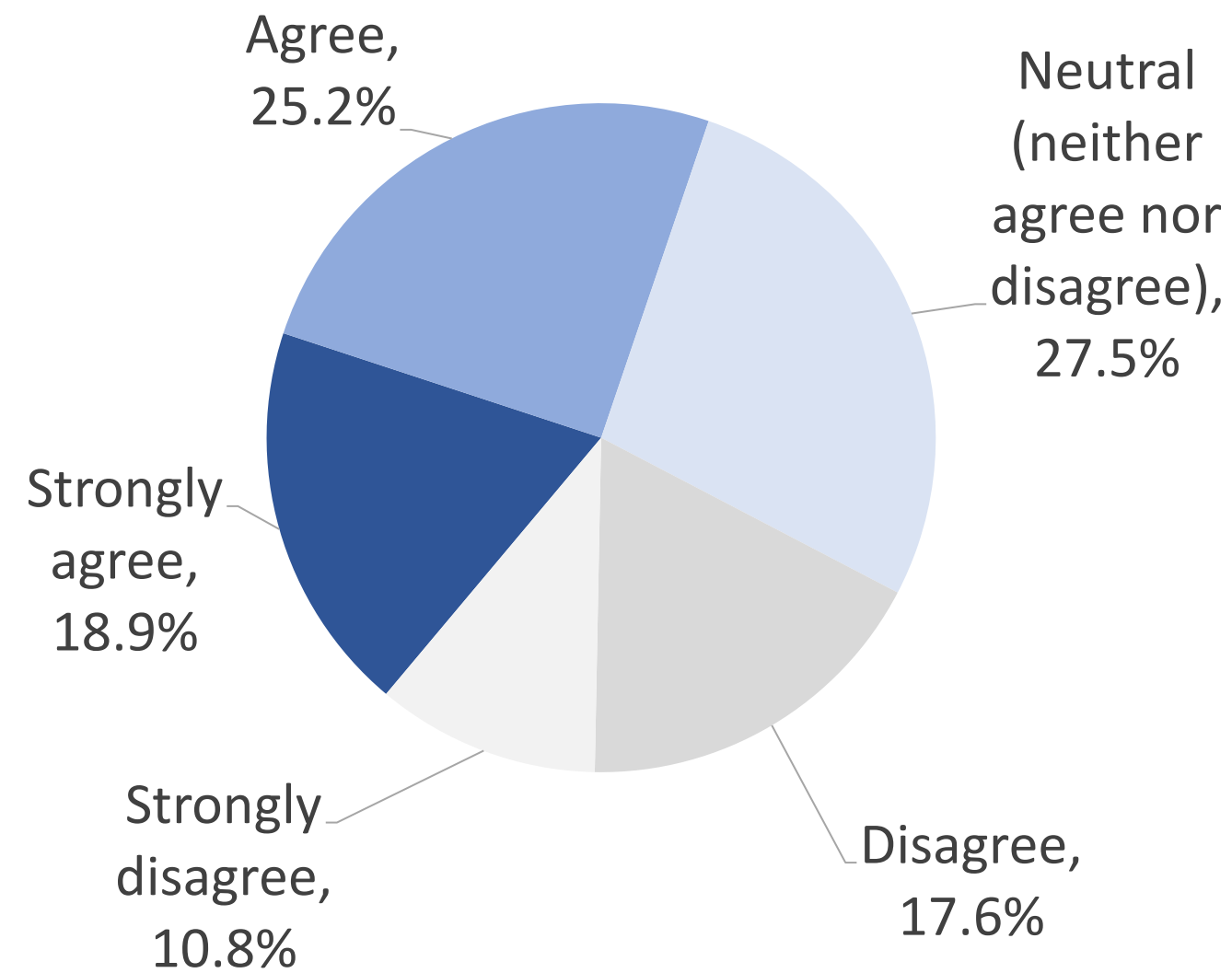


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

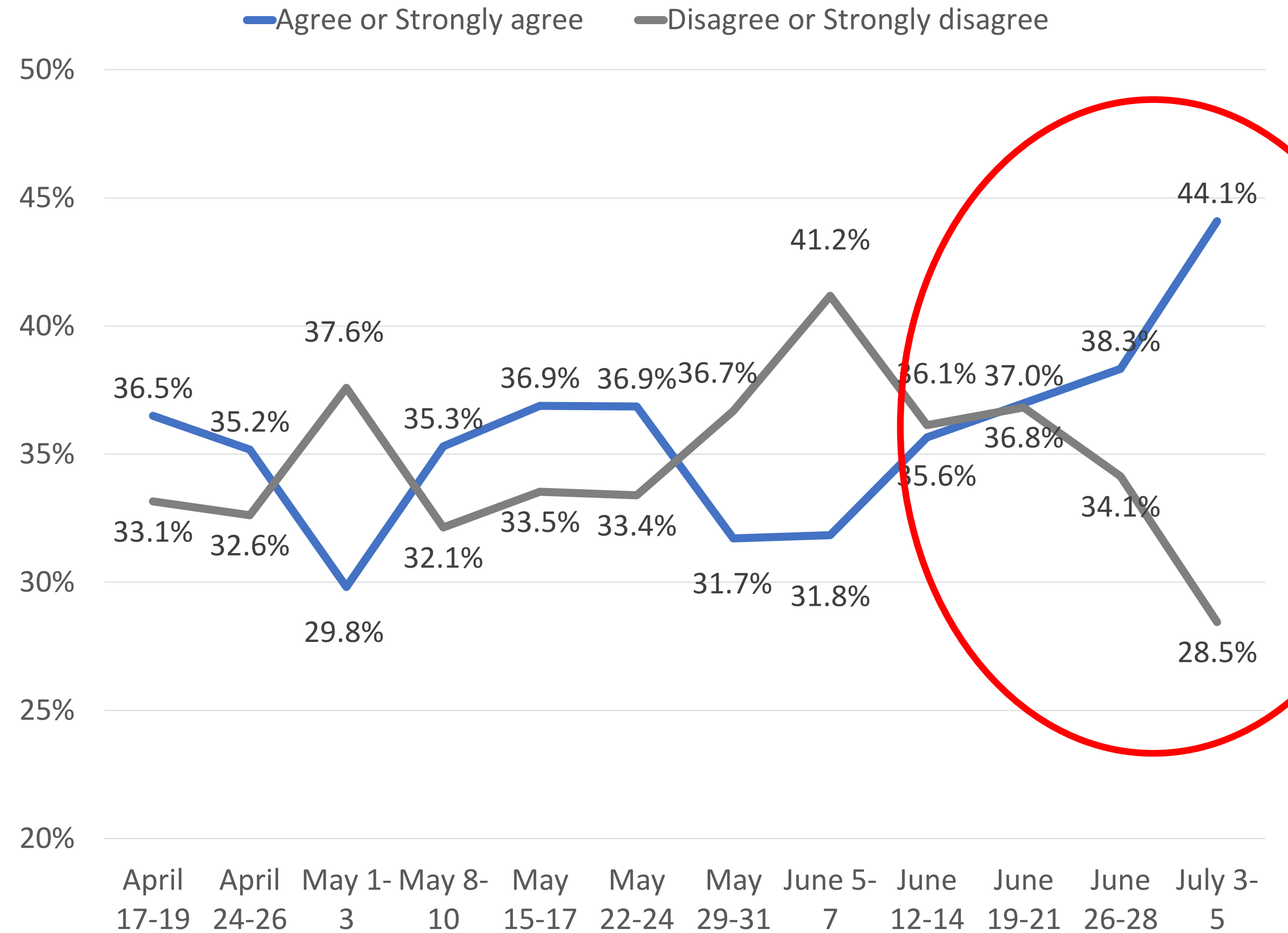
Won't Travel Without Vaccine

How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.



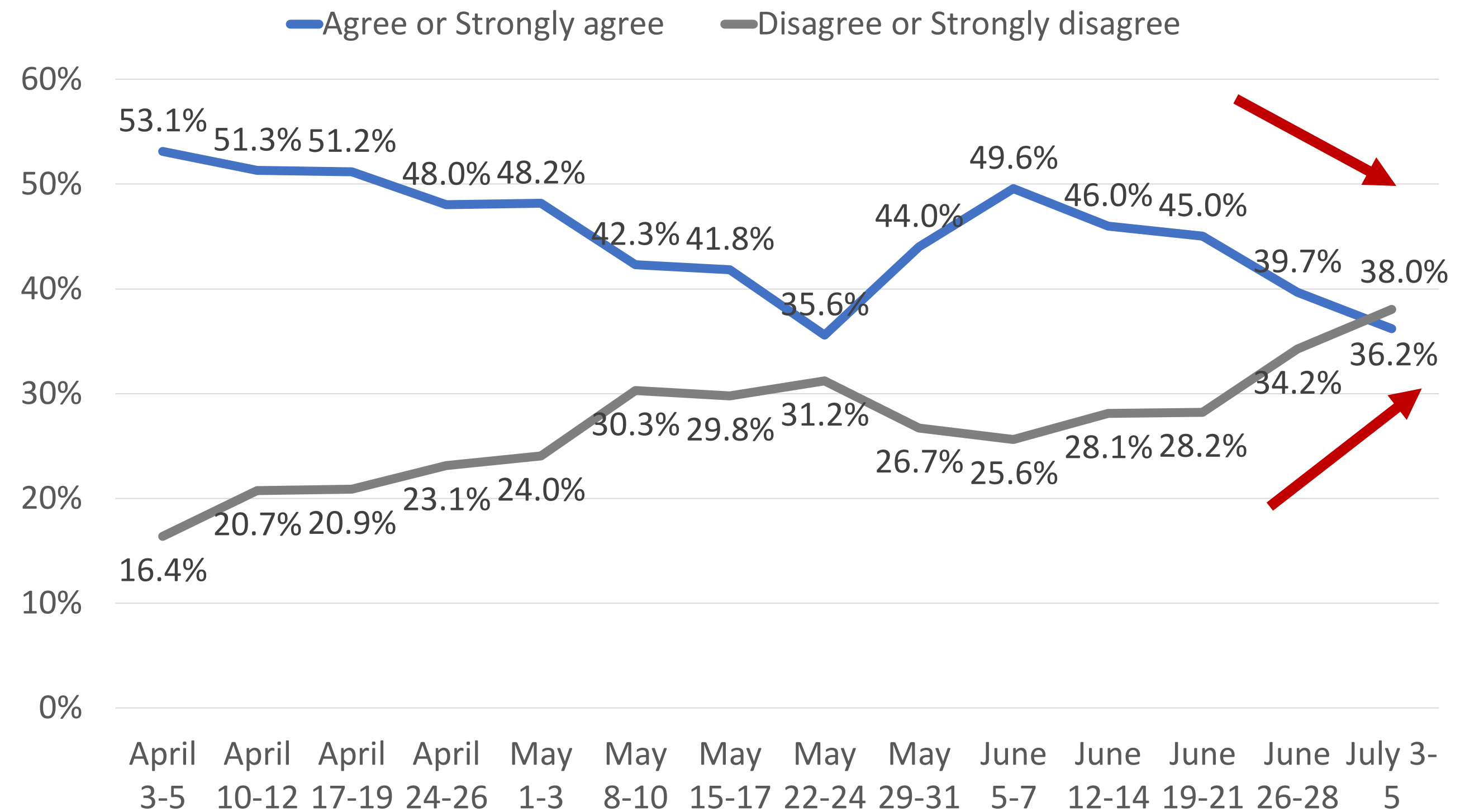
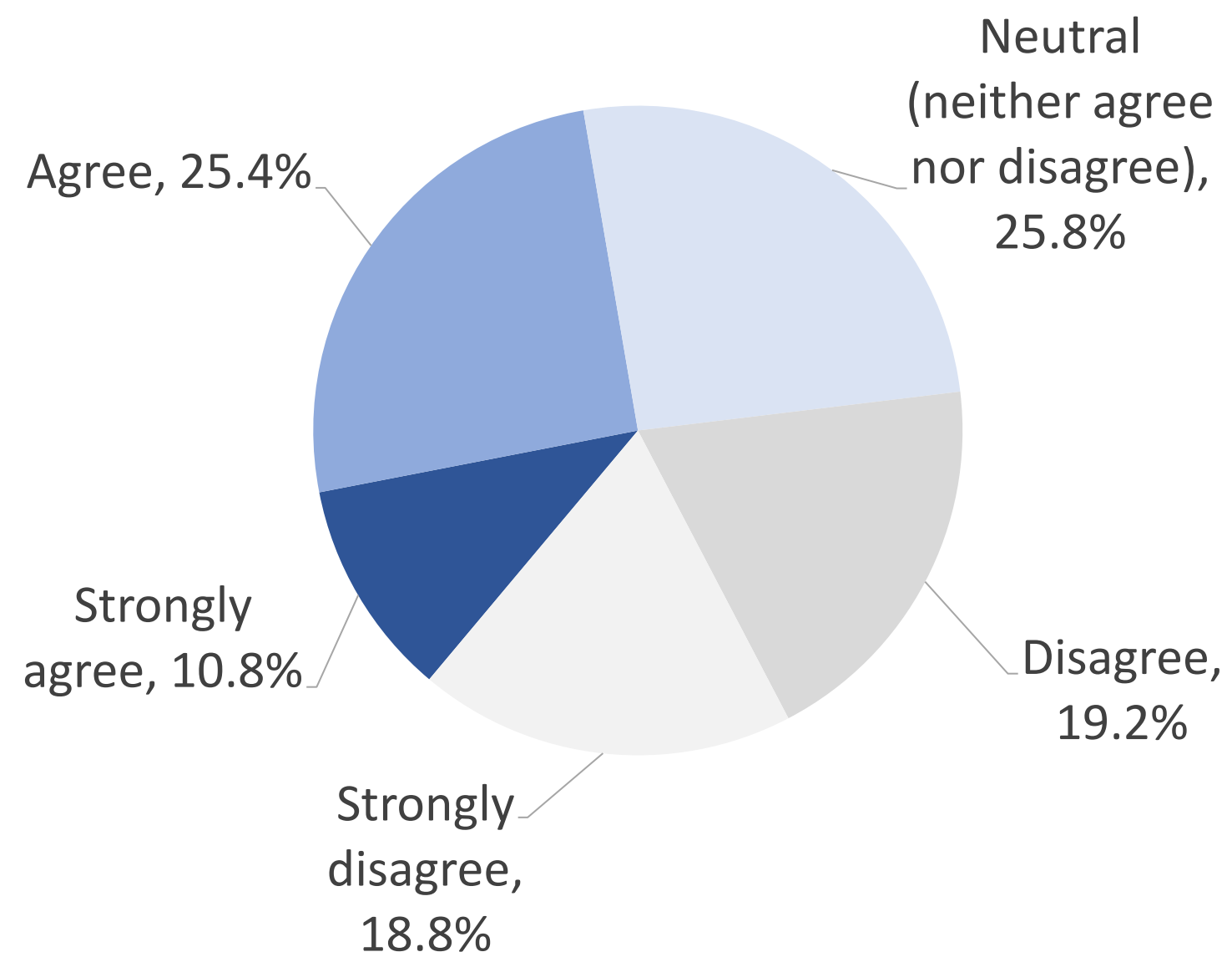
(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



Expectations for Traveling in the Fall

How much do you agree with the following statement?

Statement: I expect that I will be traveling in the Fall of 2020.

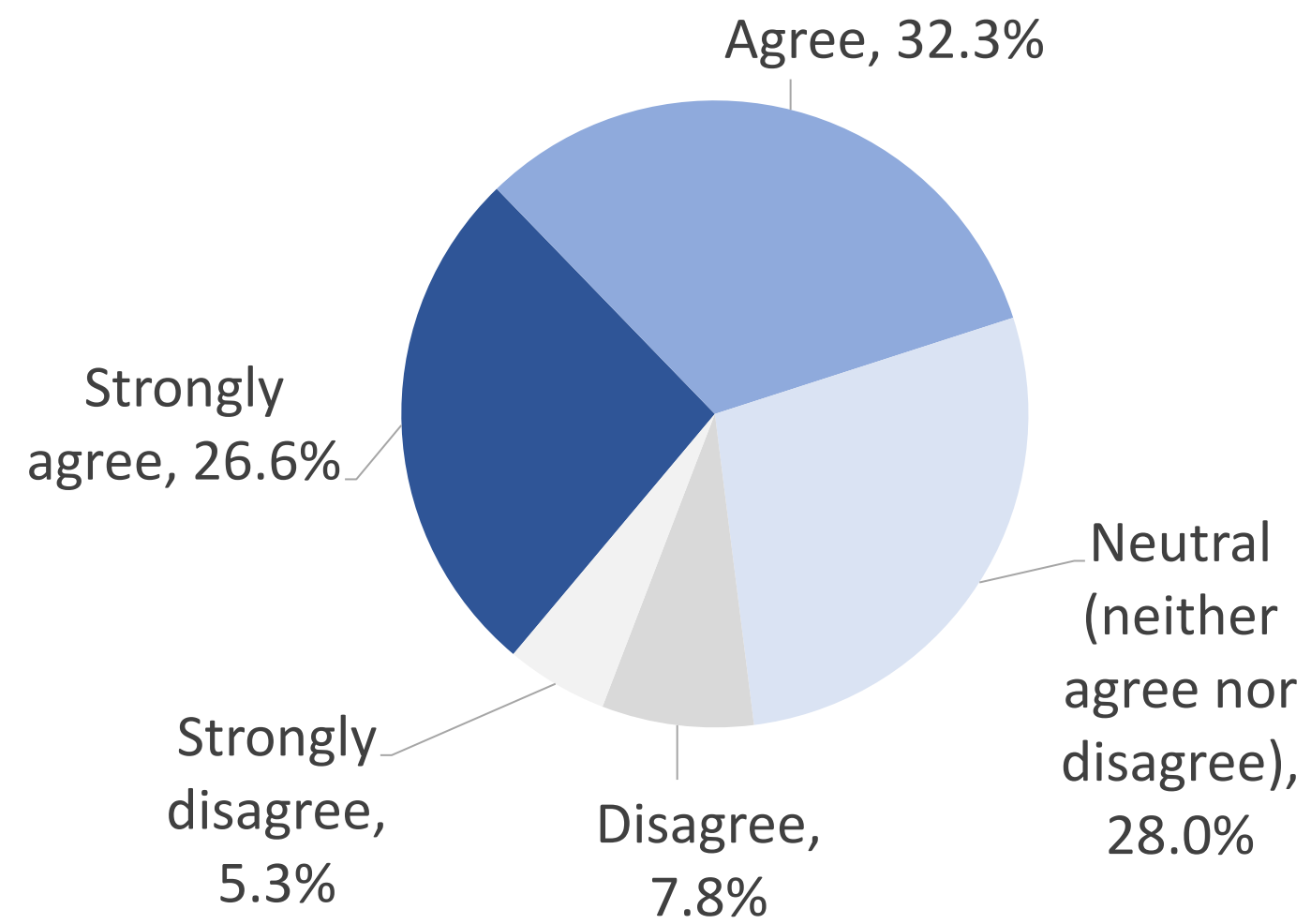


(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

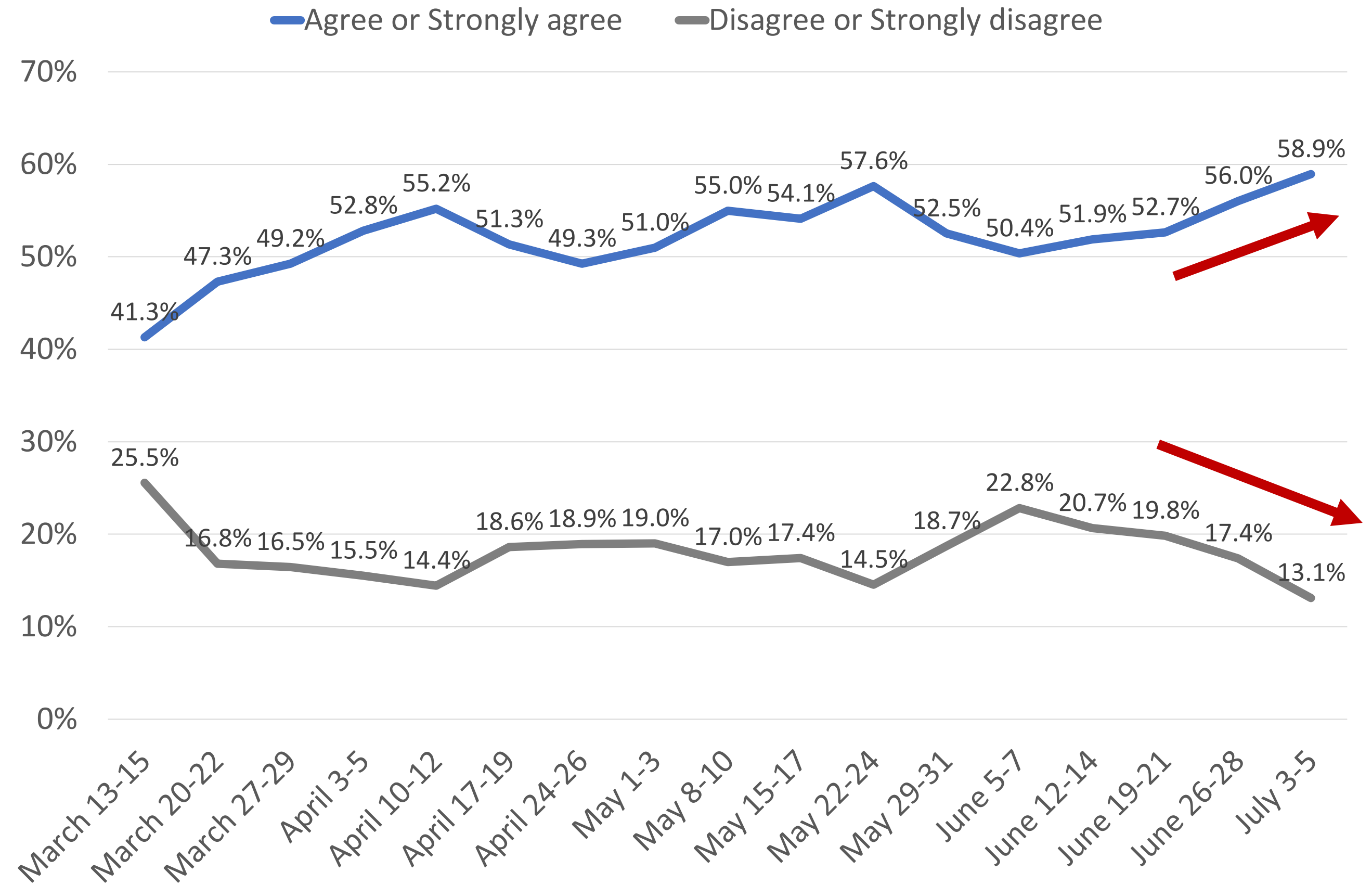
Staycations as a Replacement for Vacations

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).



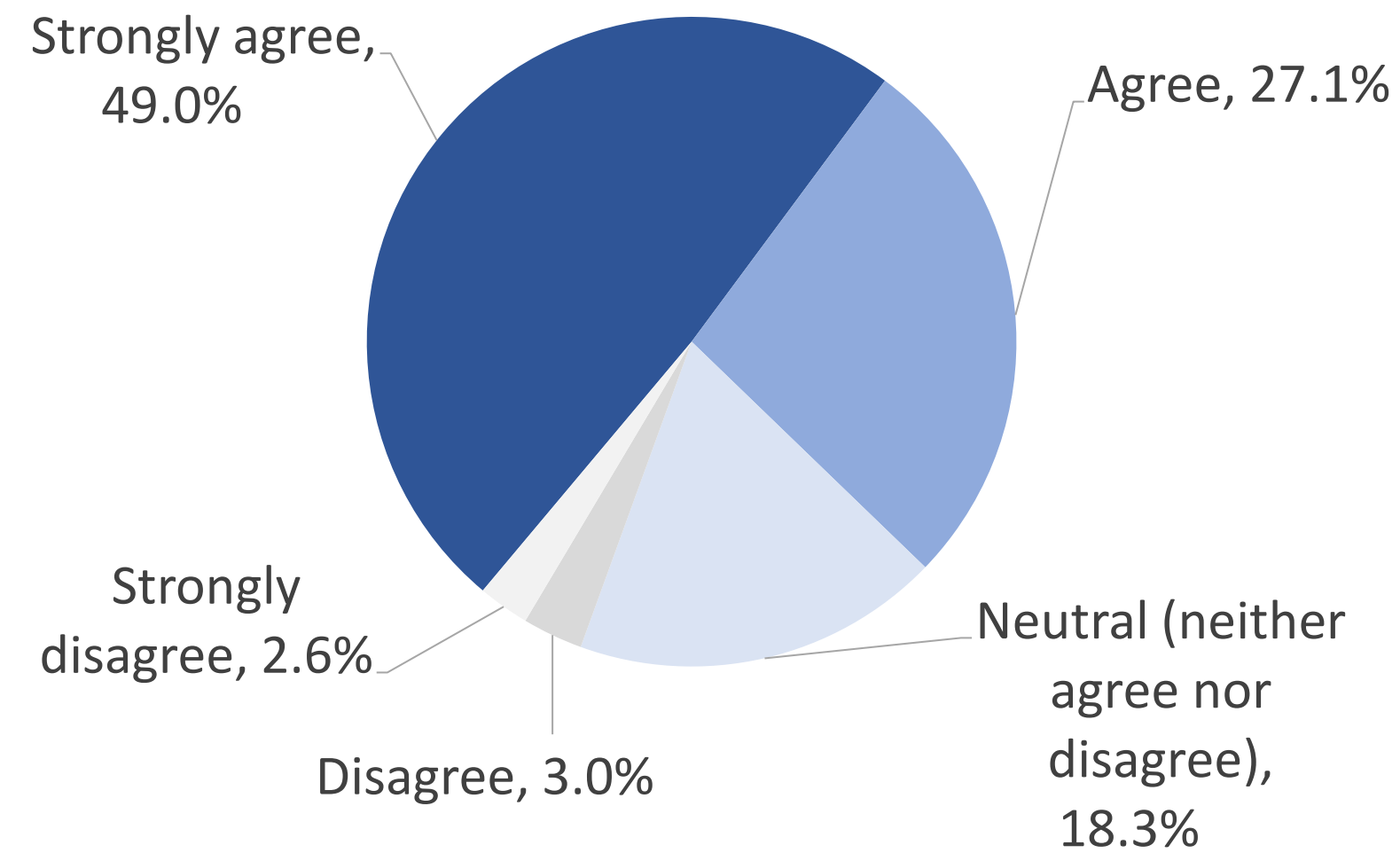
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



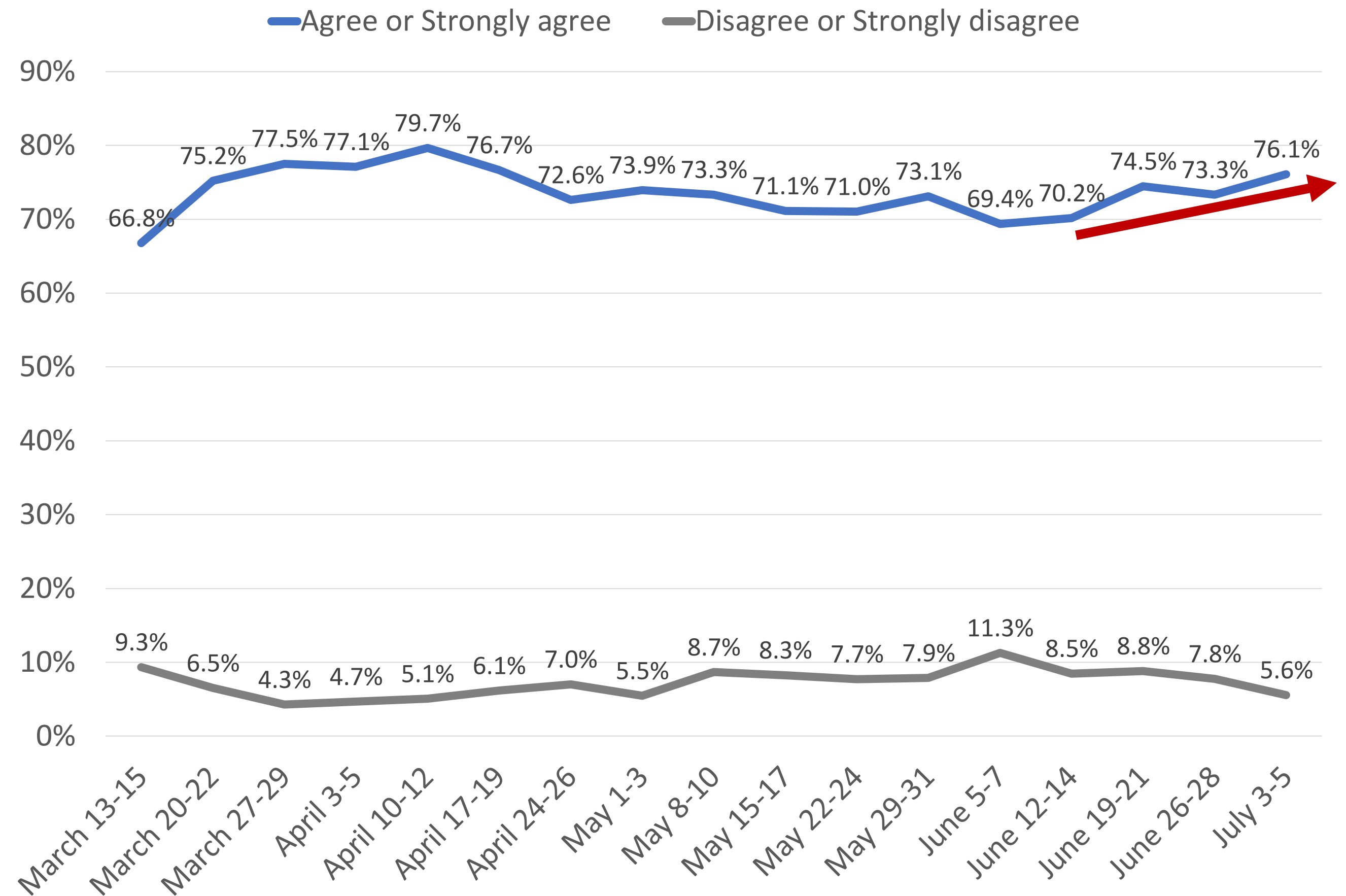
Avoiding Conventions & Conferences

How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



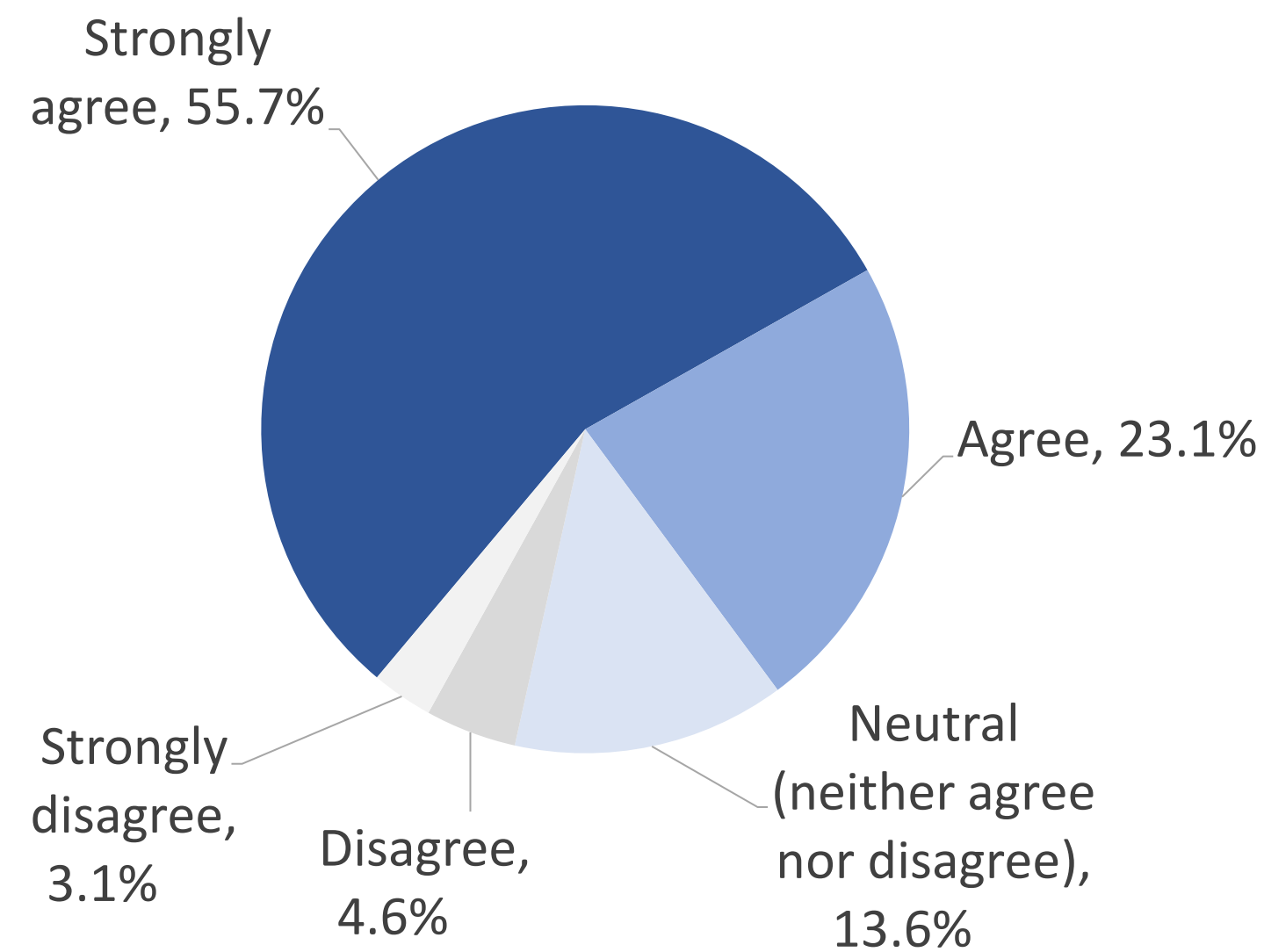
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



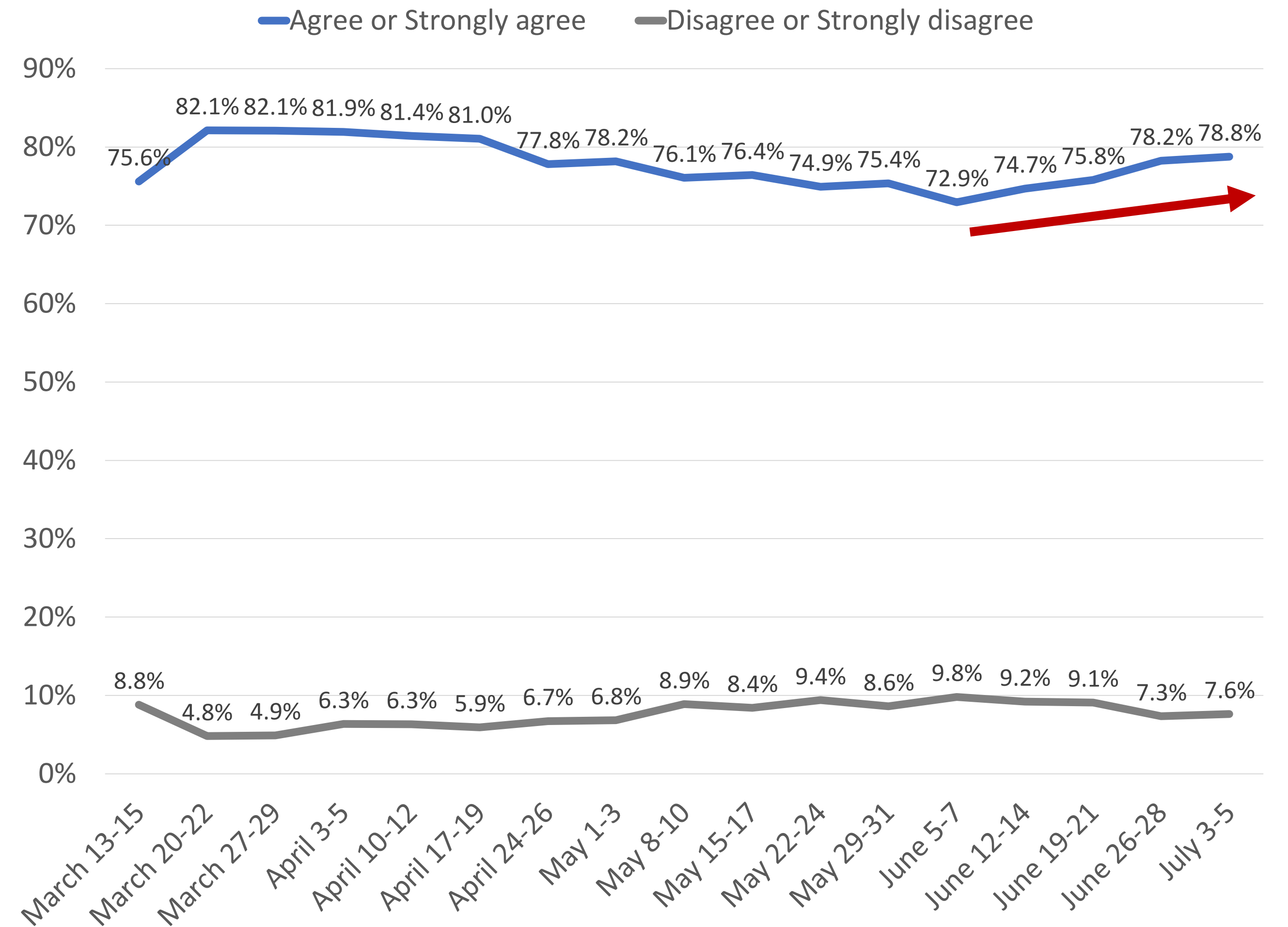
Avoiding International Travel

How much do you agree with the following statement?

Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



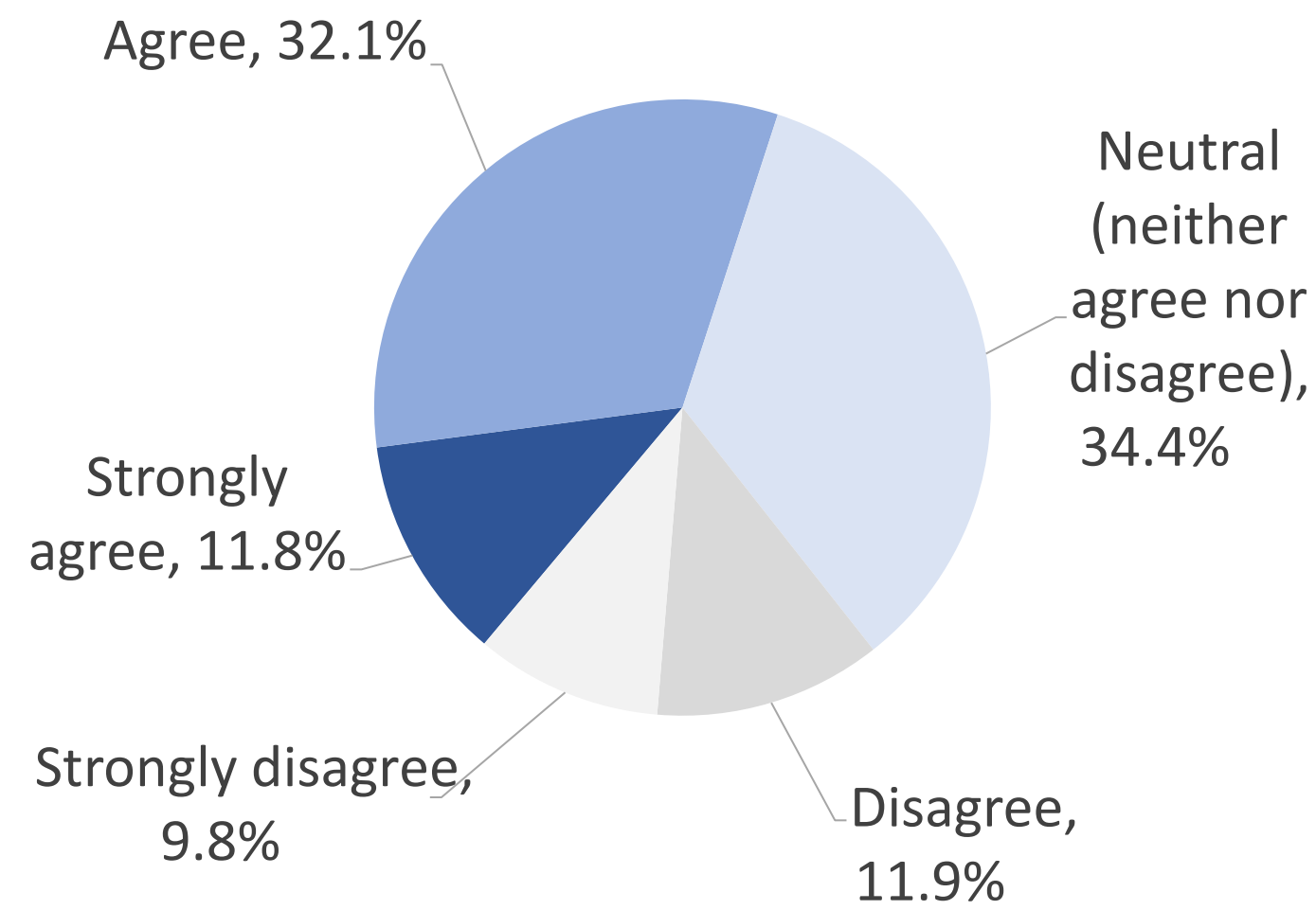
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



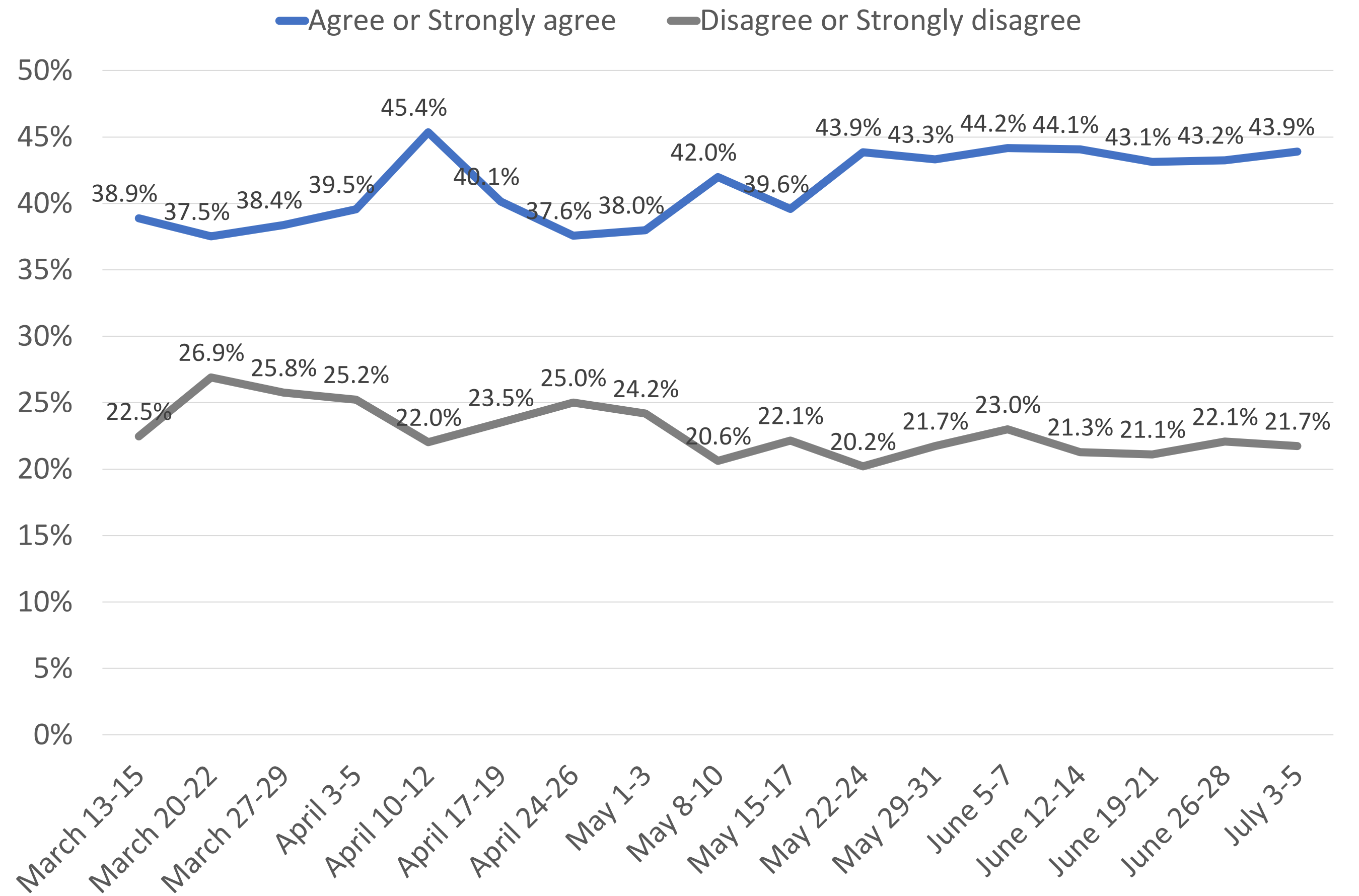
Replacing Air Travel With Road Trips

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel.



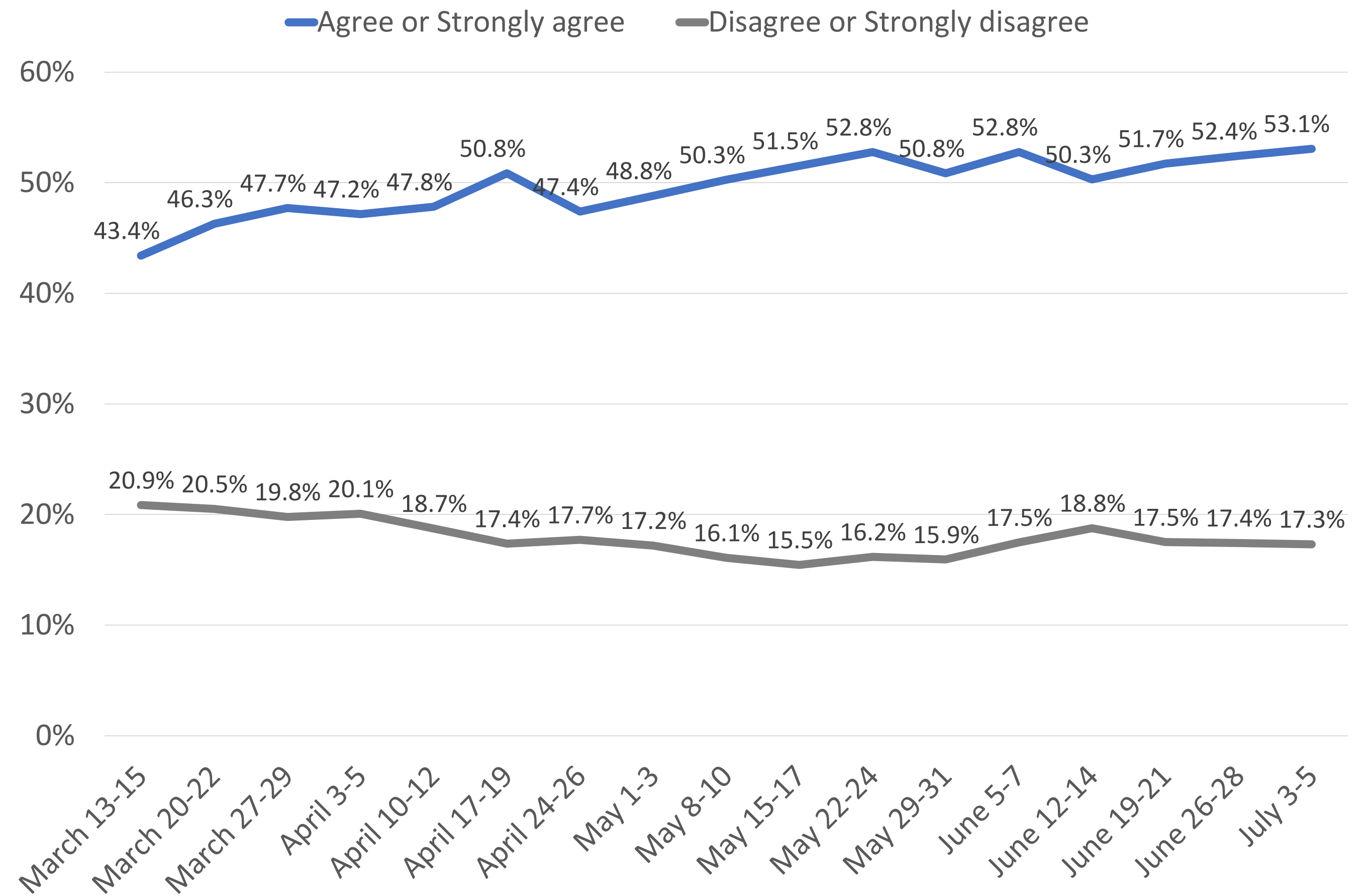
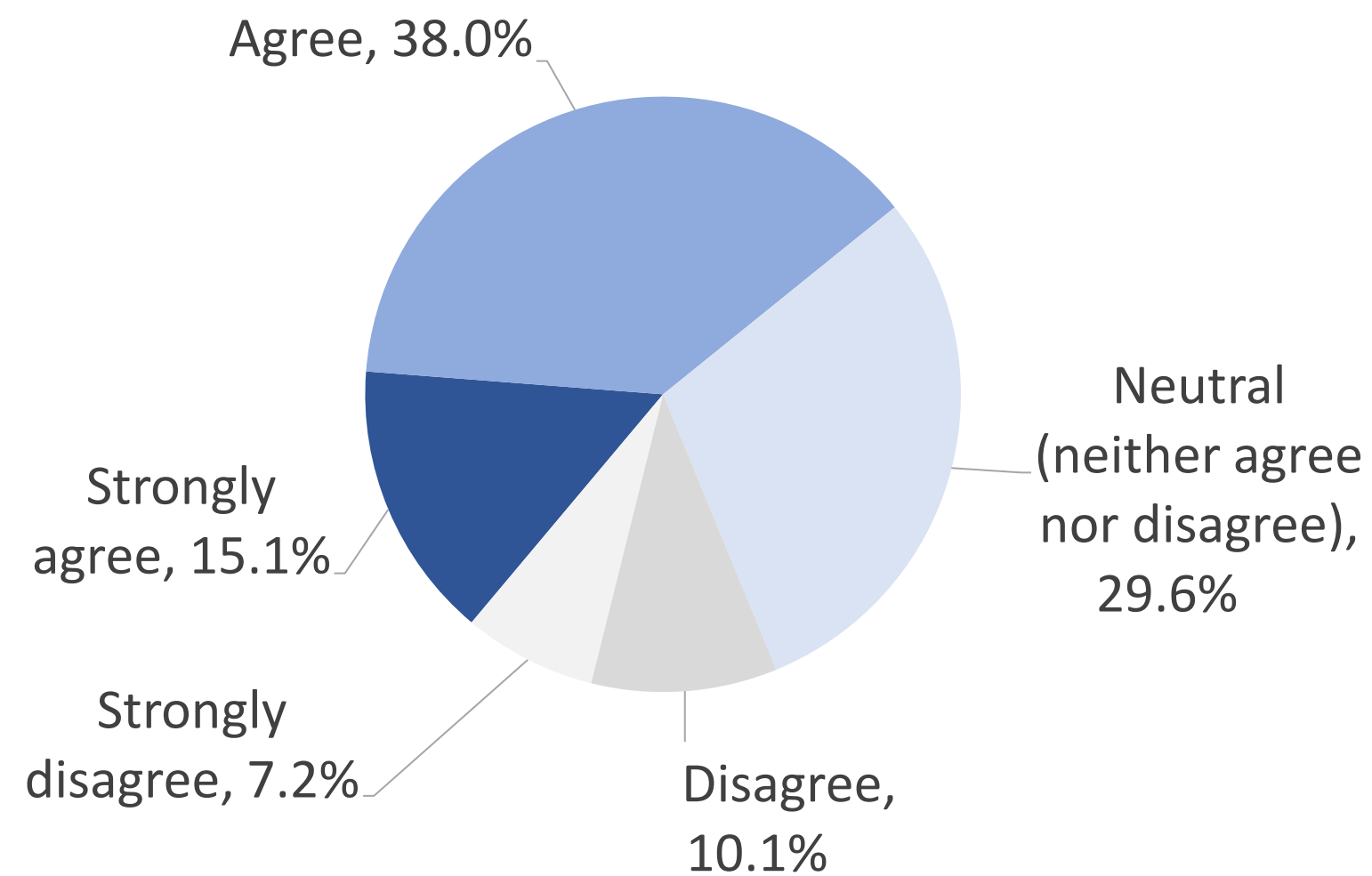
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



Replacing Long-Haul Travel with Regional Trips

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).



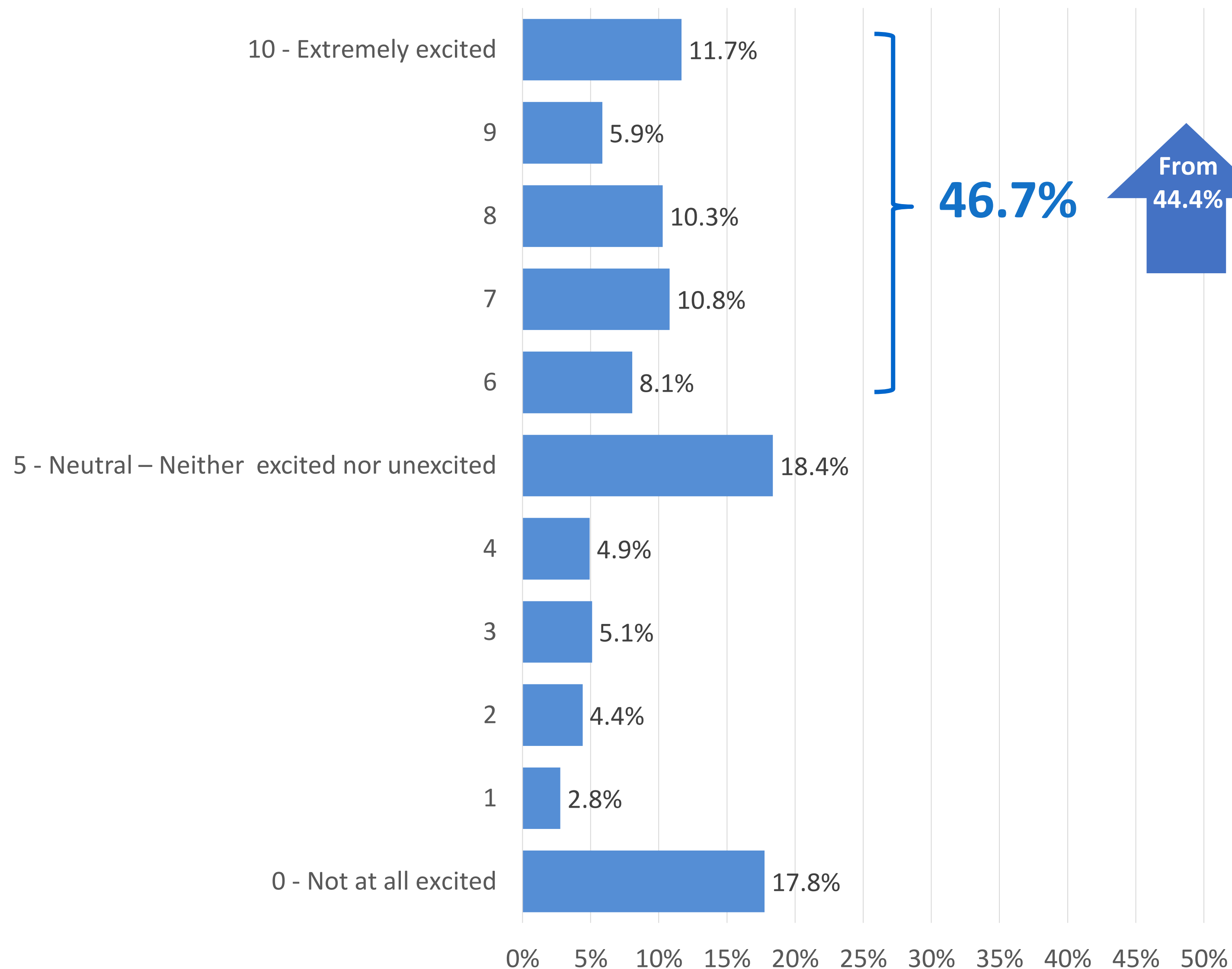
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

Excitement to Travel Now

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: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

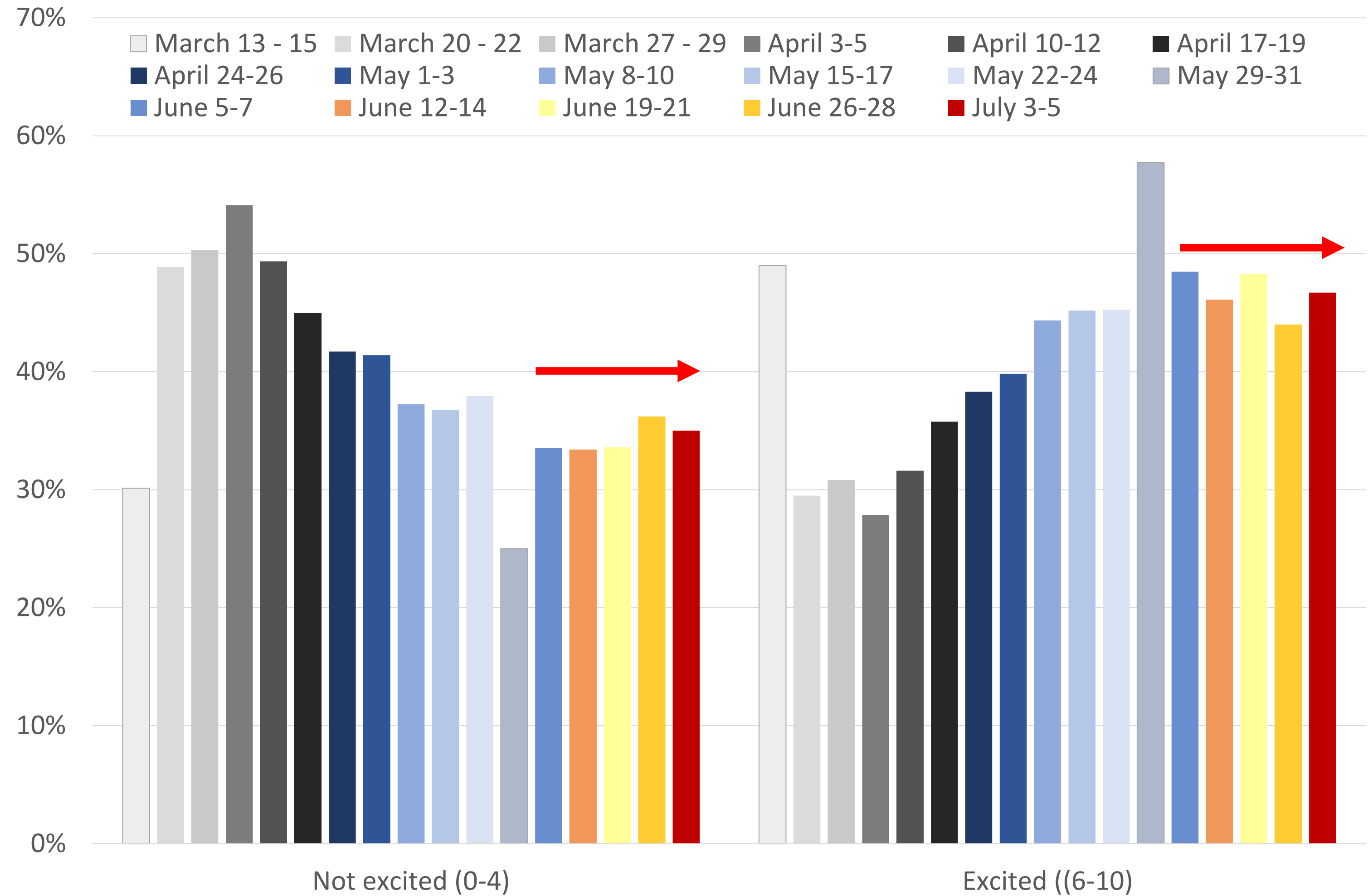


Excitement to Travel Now (Excited vs. Not Excited)

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)

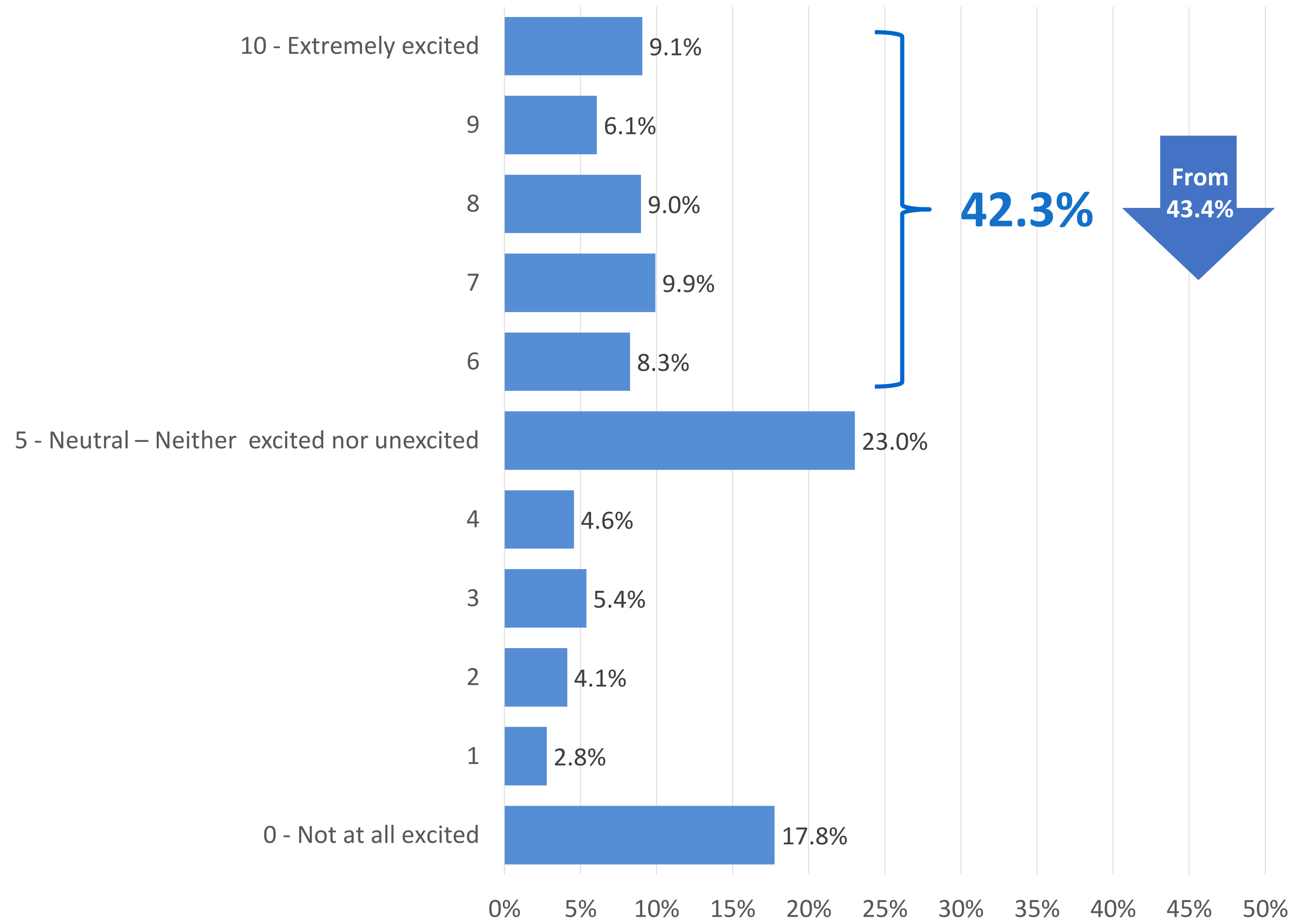
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,364 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



Openness to Travel Information

Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

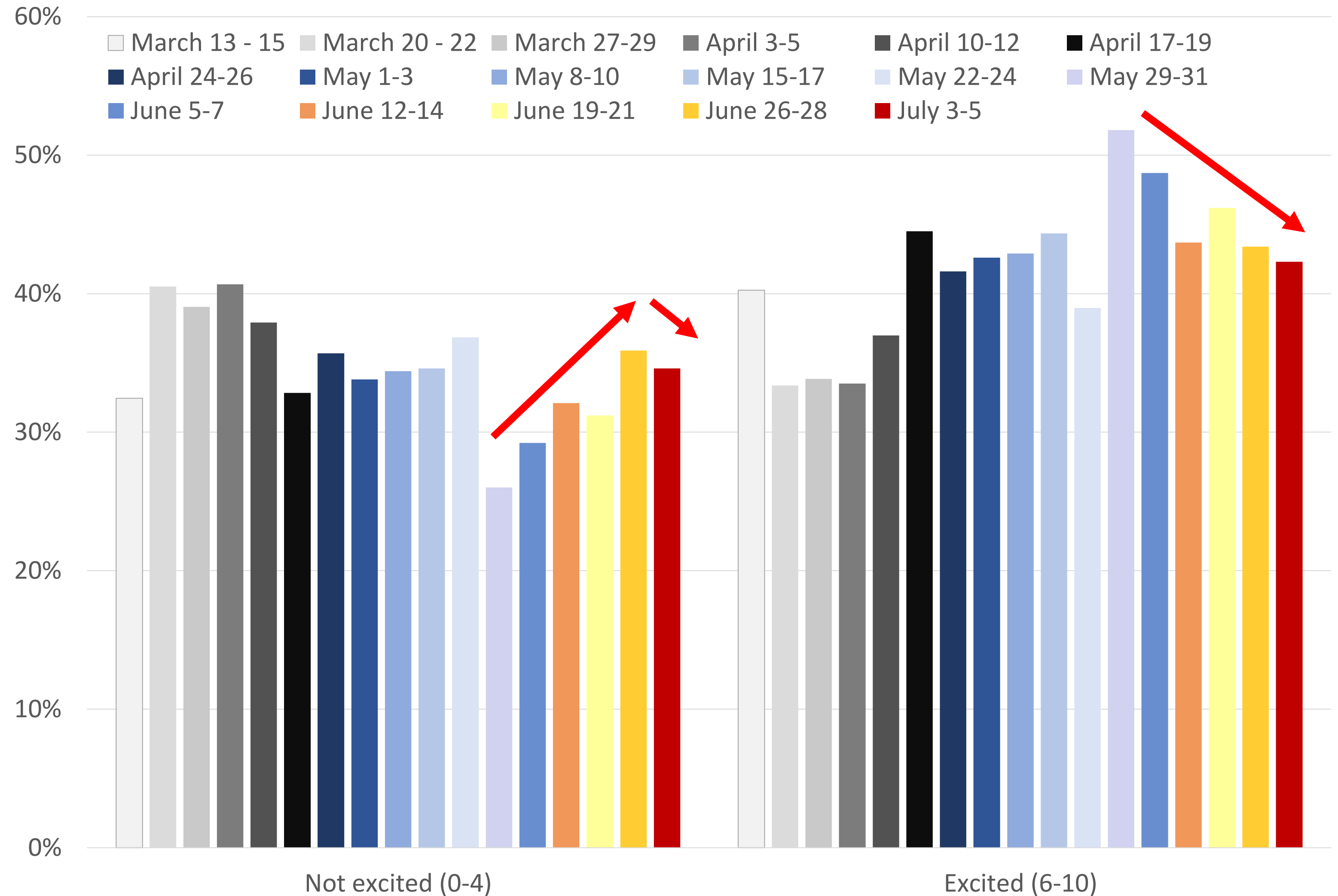
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Openness to Travel Information (Excited vs. Not Excited)

Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations 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 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)





KEY TAKEAWAYS

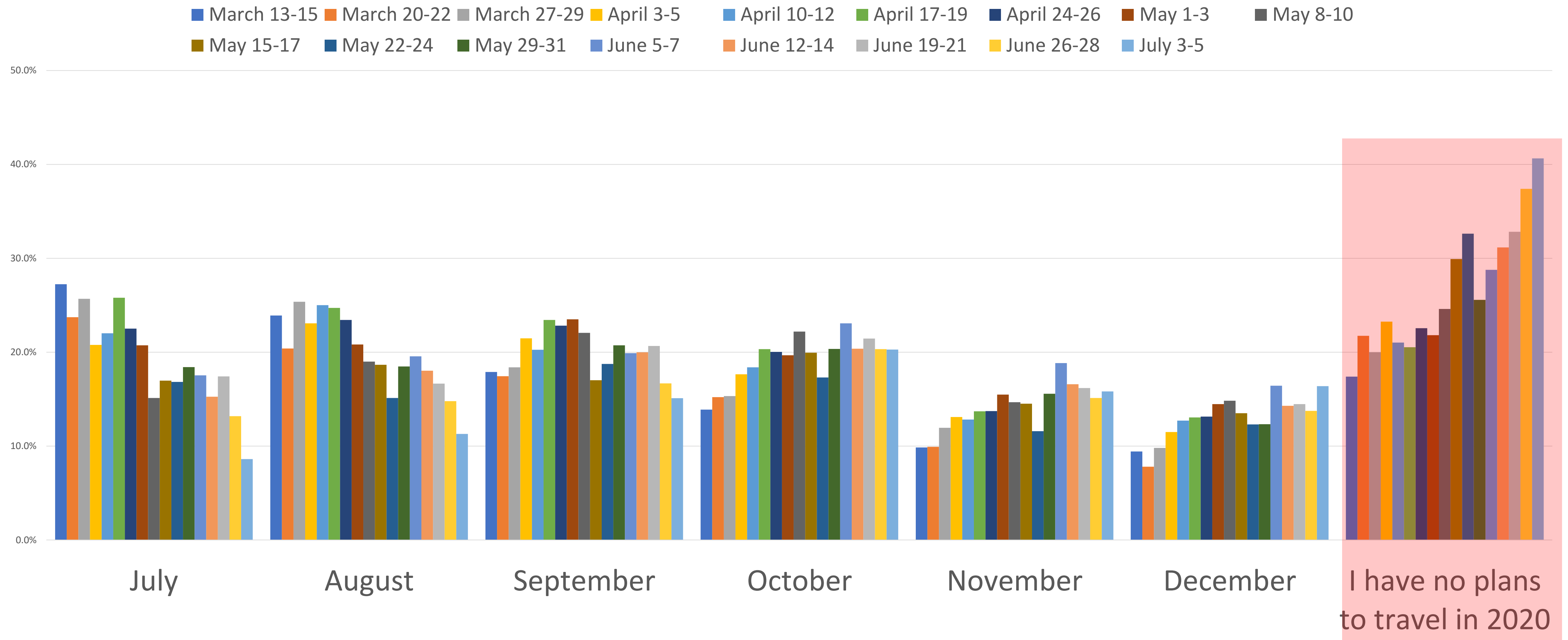
- **Approaching two-thirds of American travelers feel the pandemic is going to get worse in the US in the next month—up dramatically from 34.7% at the beginning of June**
- **Perceptions of travel activities as safe have rolled back to early May levels**
- **The decline in feelings of safety is impacting the majority of Americans' openness to and enthusiasm for travel, as well as their anticipated trip behaviors**

A man and a woman are standing outdoors, both wearing white face masks. The man is holding a large, light-colored suitcase. They appear to be travelers. The background is a blurred outdoor setting with trees and a path. The overall image has a dark, semi-transparent overlay.

Traveling in the Pandemic

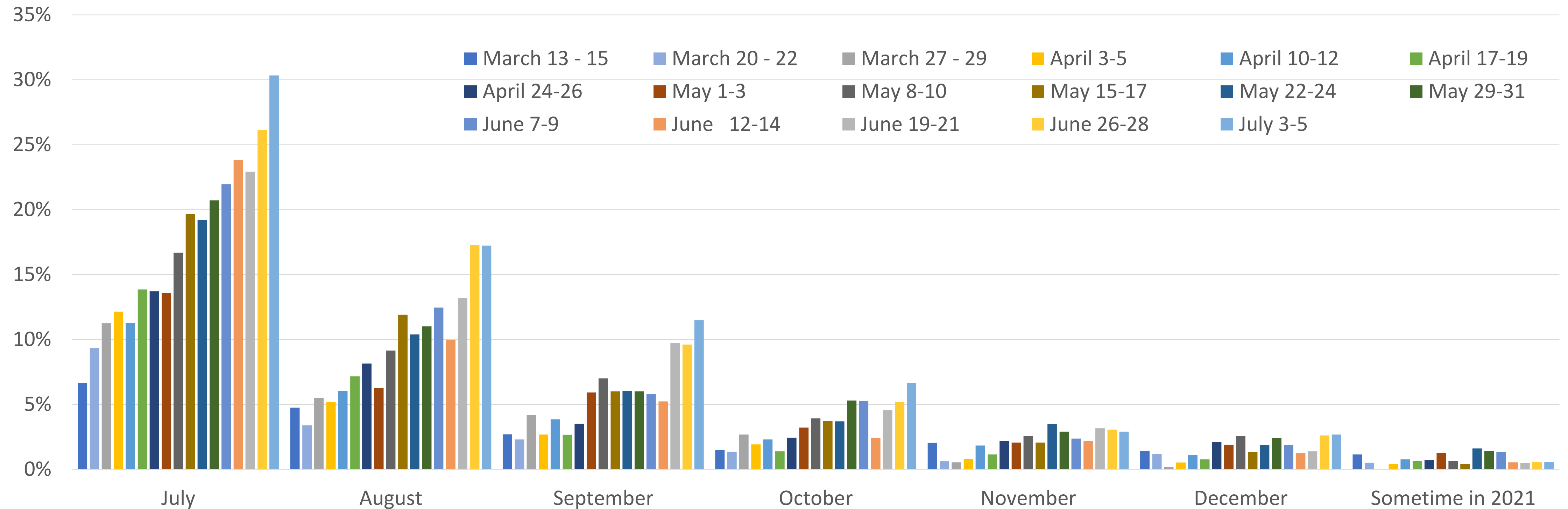
Upcoming Travel Plans

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



Month of Trip Cancellation

Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

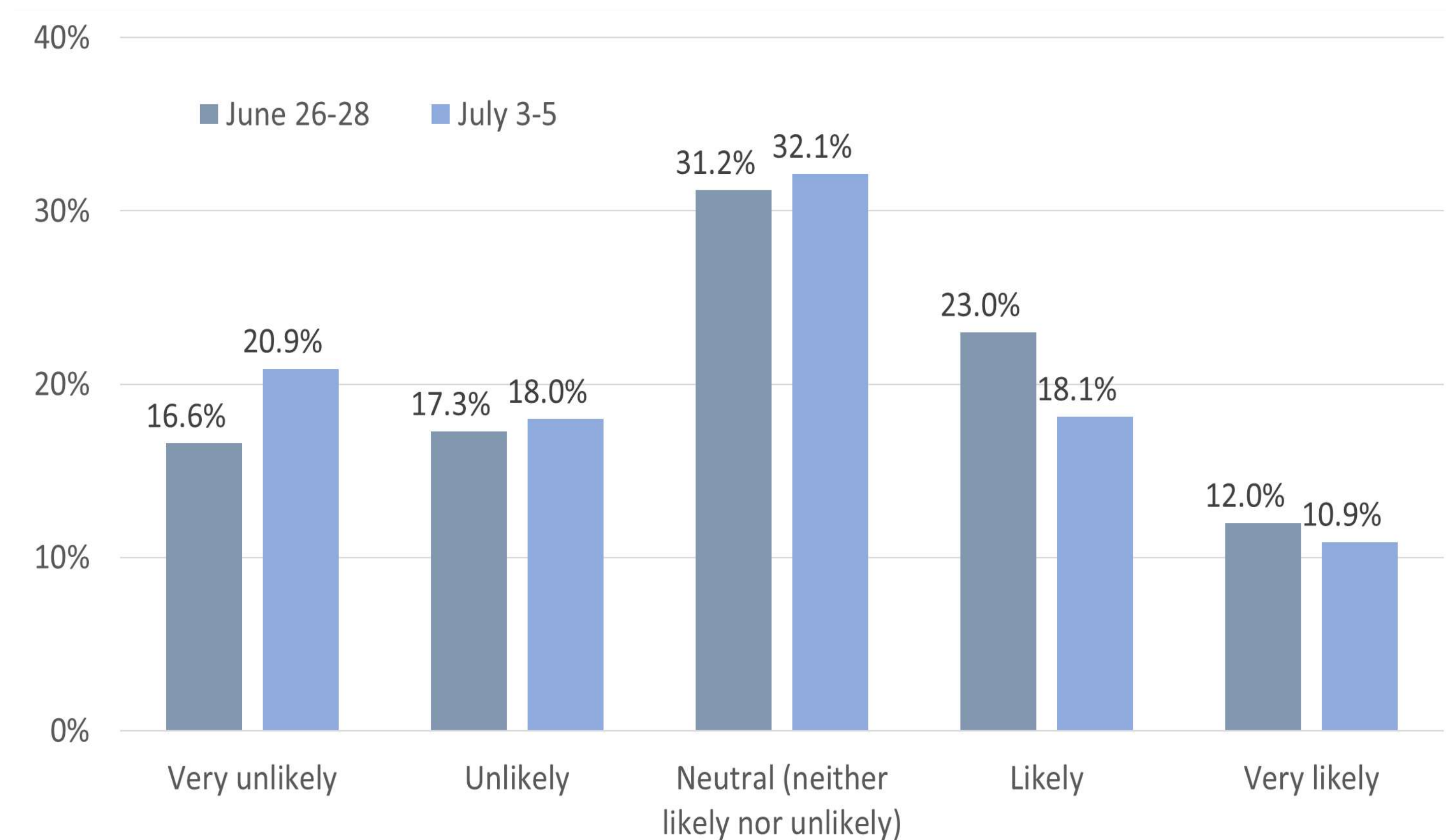


(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665 and 728 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, and July 3-5 2020)

Openness to New Destinations, Next 3 Months

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?

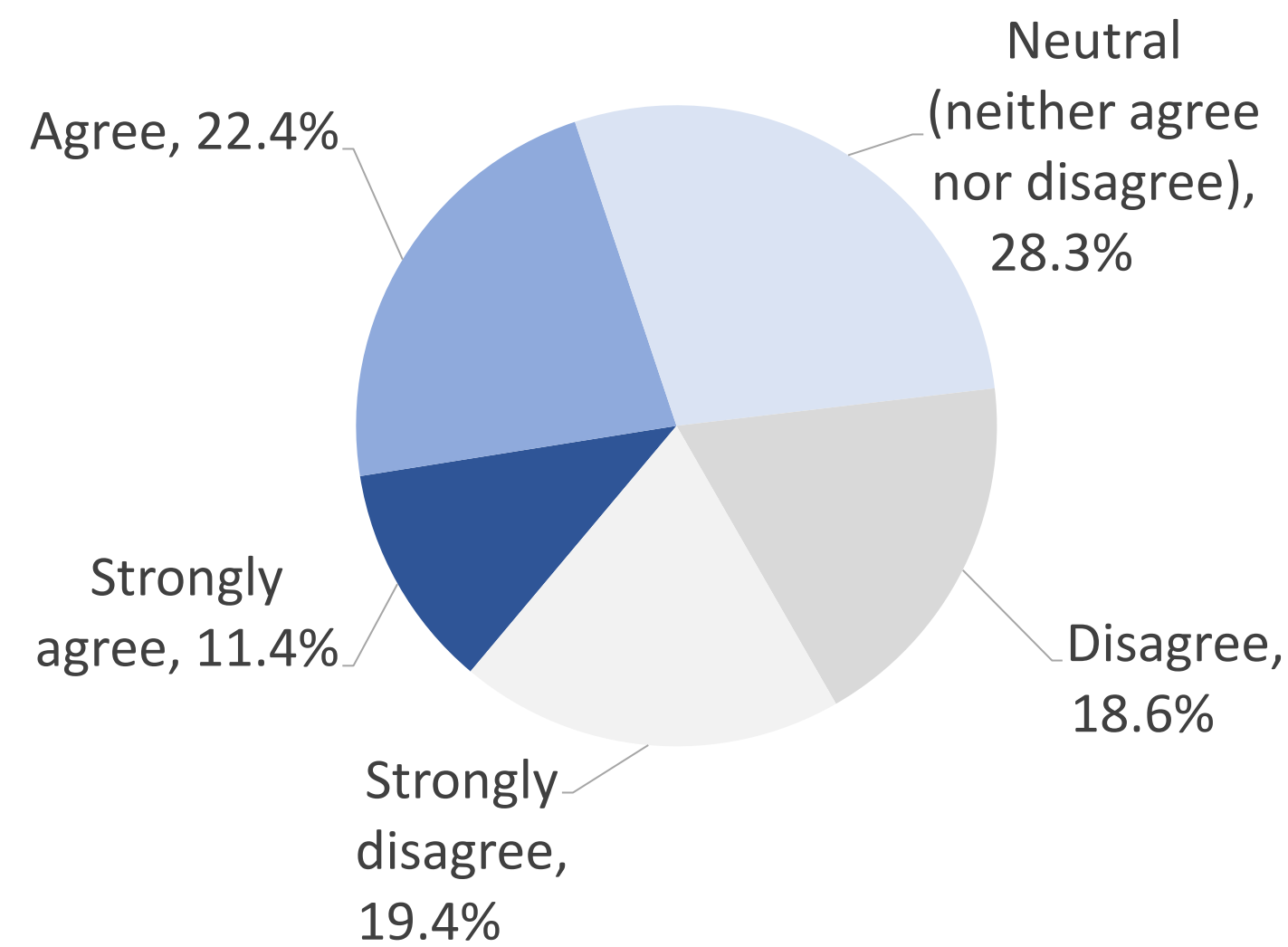
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



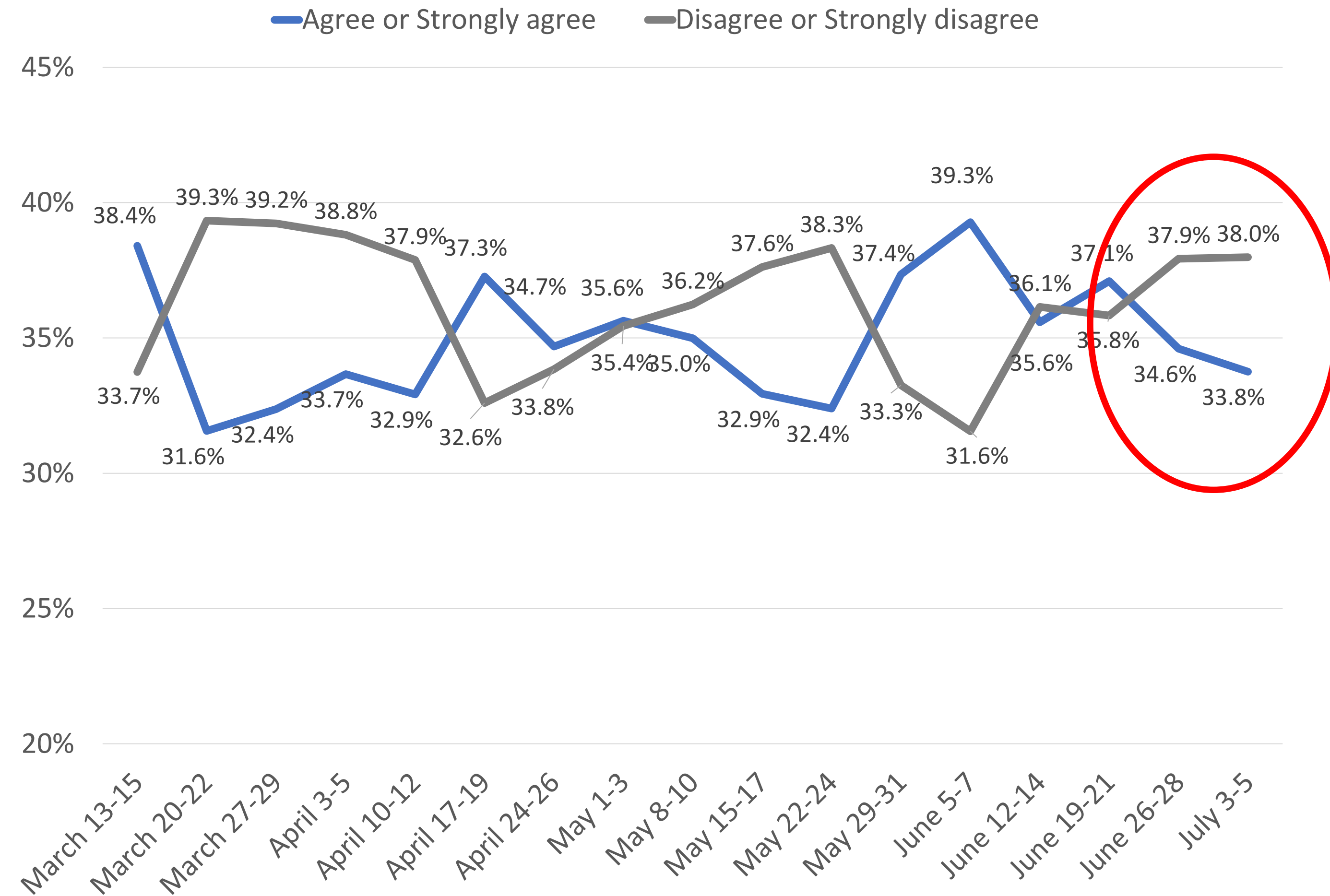
Discounts and Price Cuts

How much do you agree with the following statement?

Statement: 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.

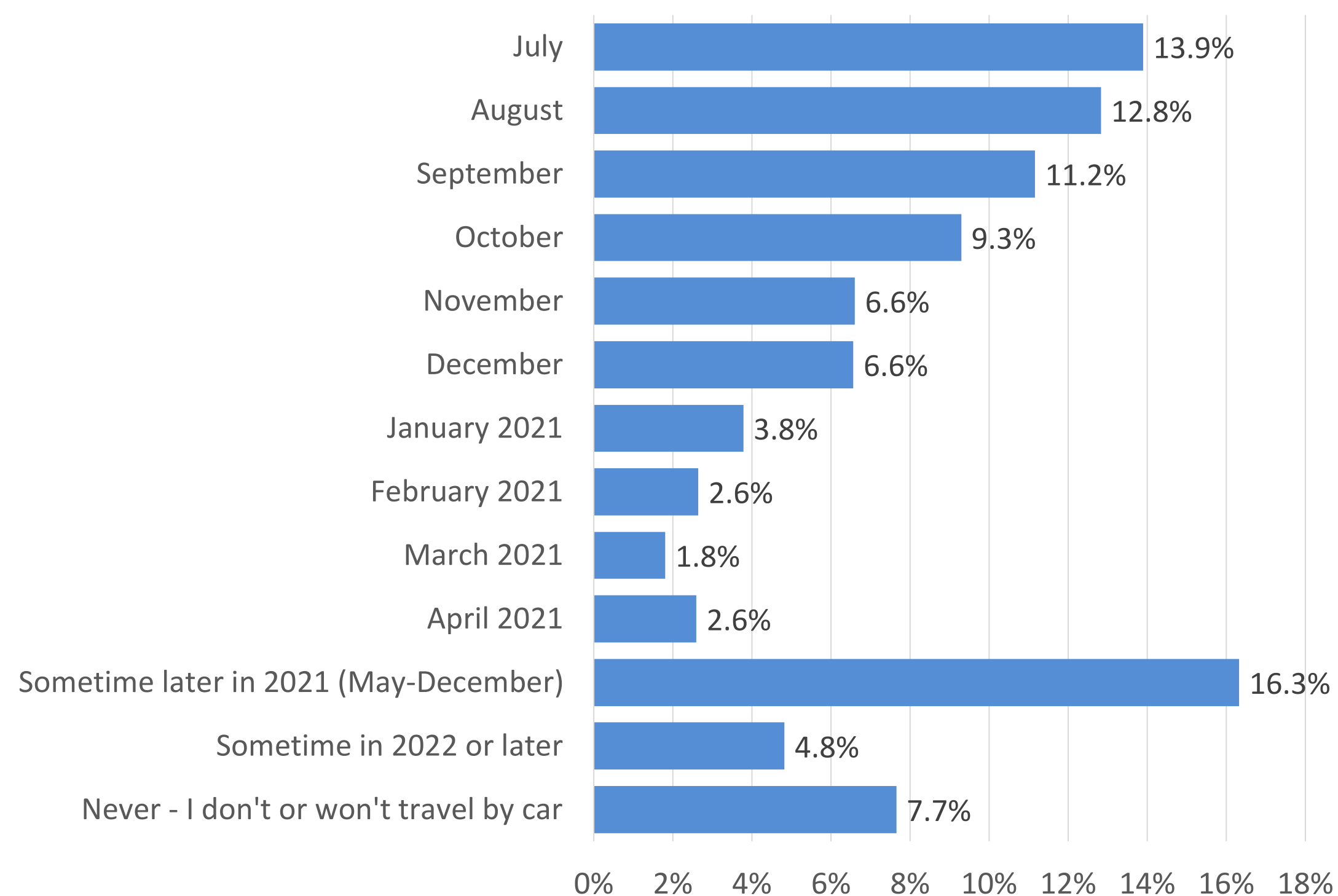


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)

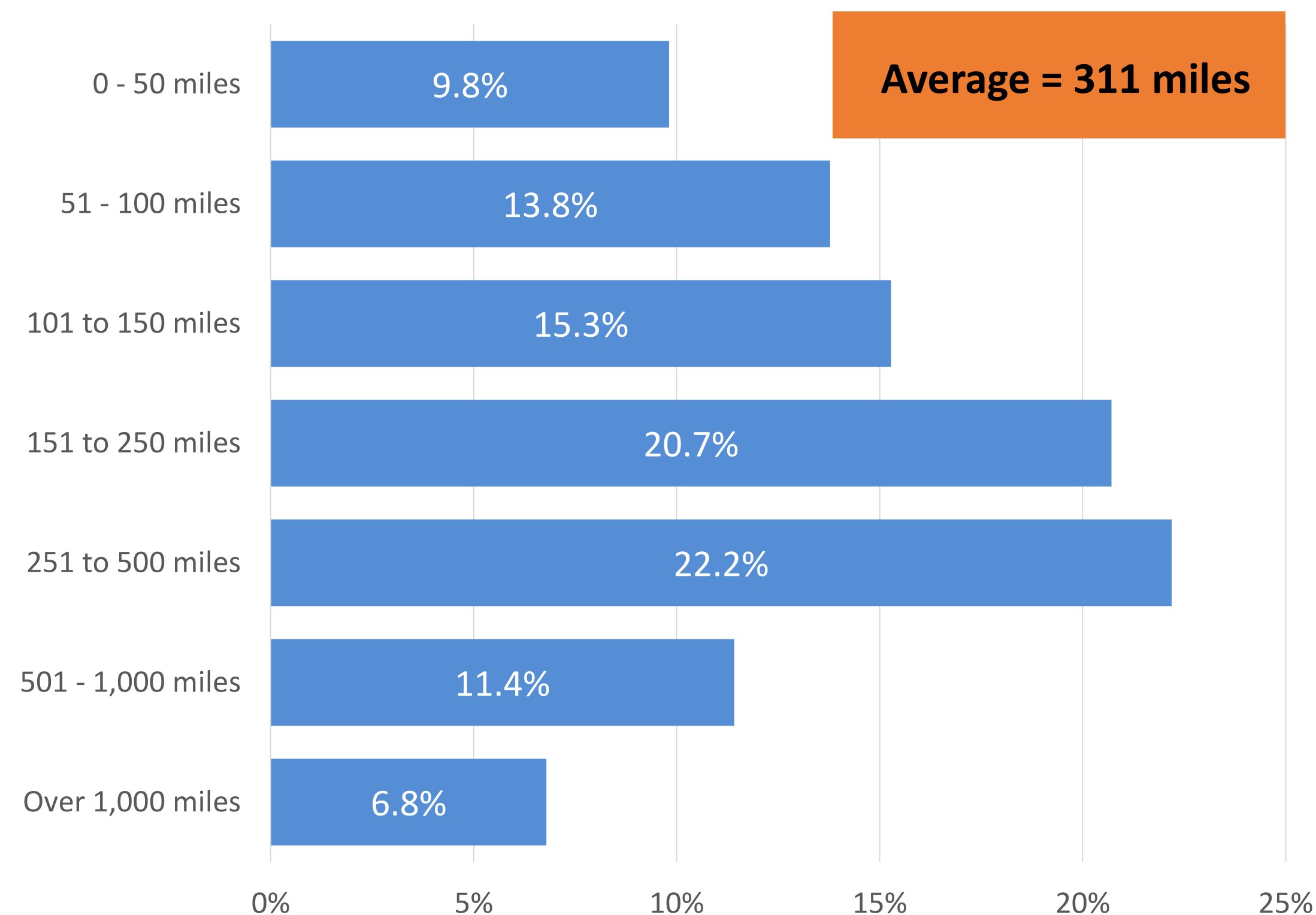


Road Trips Expected

Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

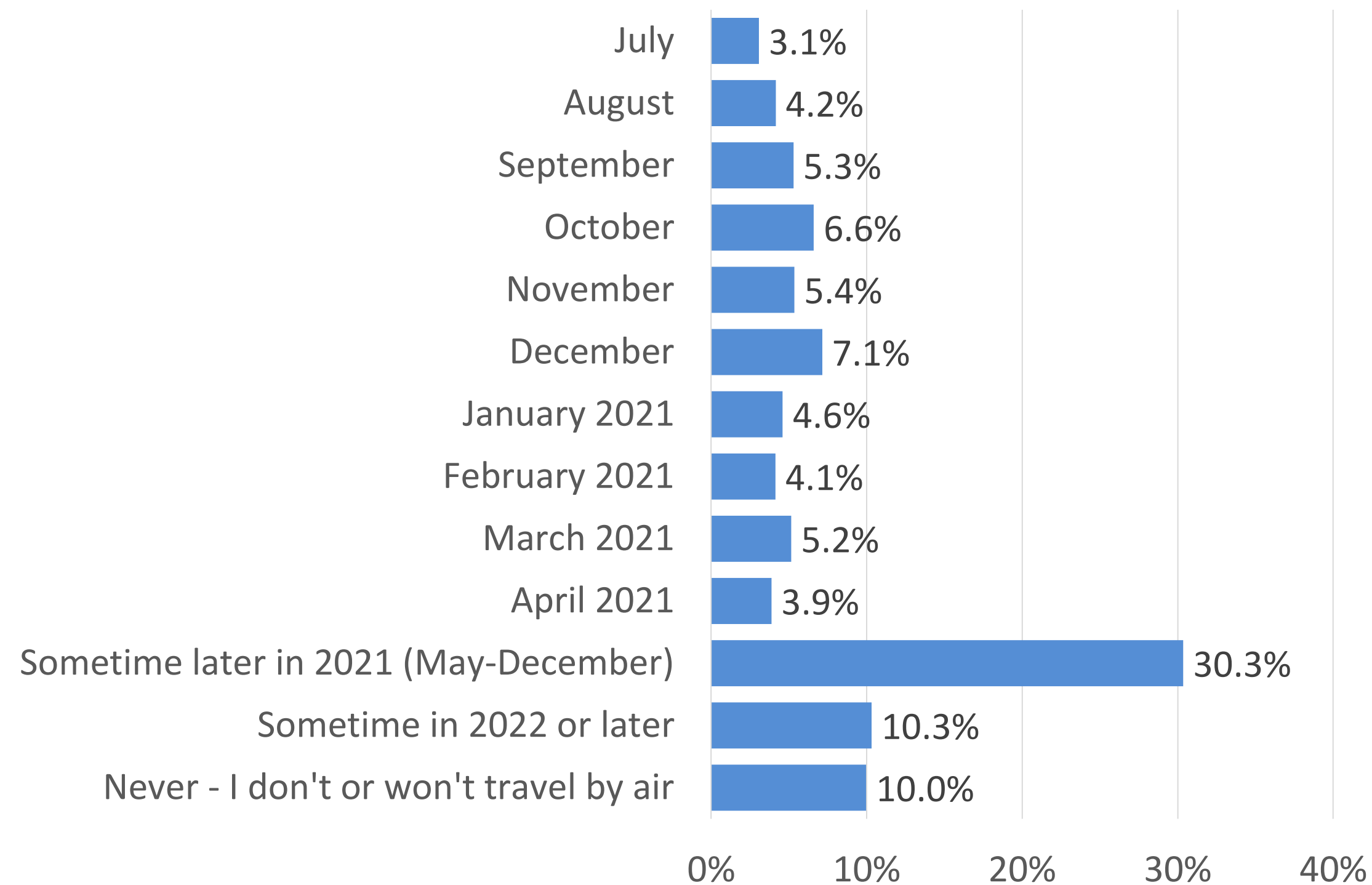


Question: On your next ROAD TRIP, how far away from home will be likely you travel?

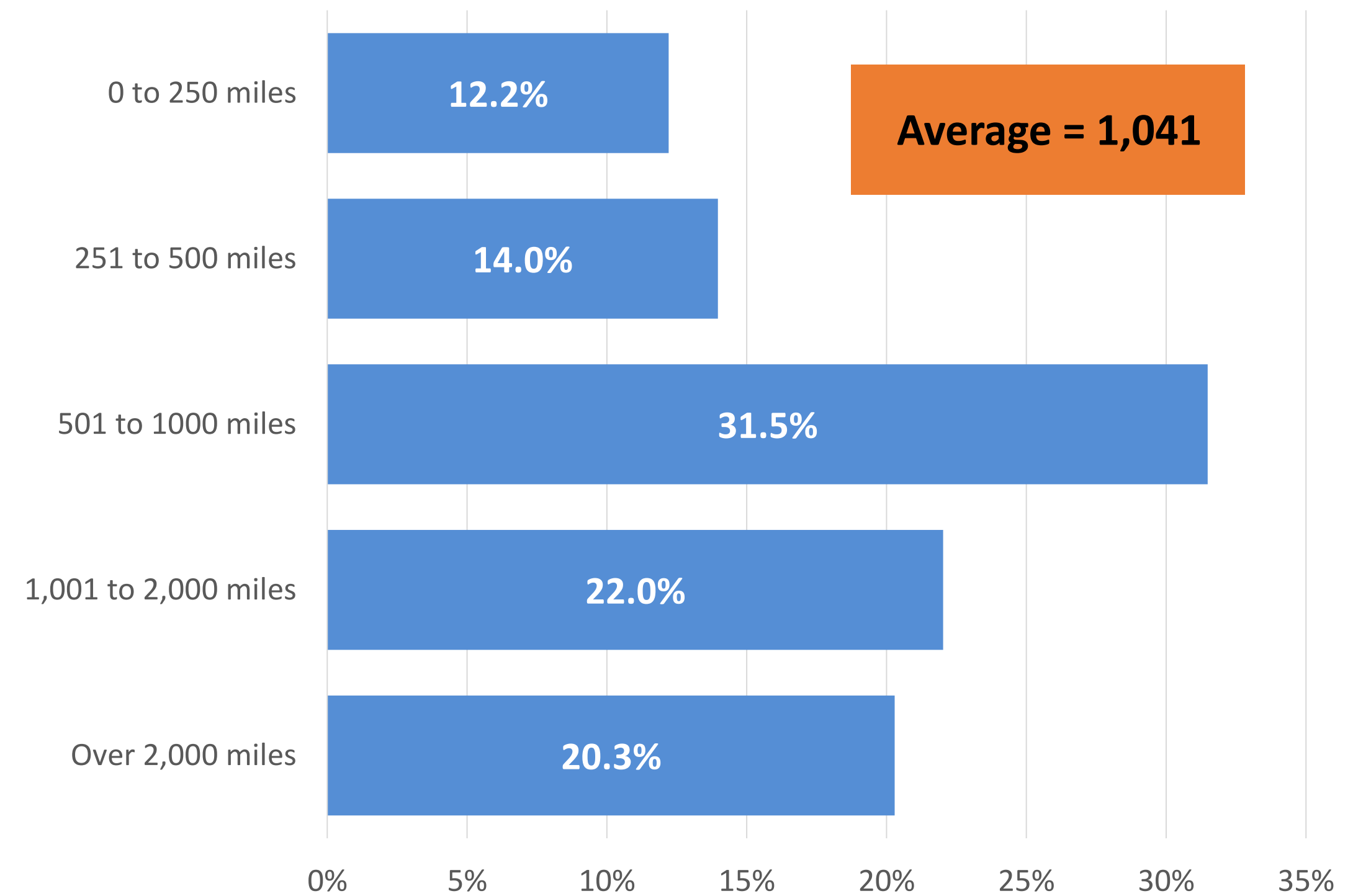


Commercial Airline Trips Expected

Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?



Question: On your next TRIP ON A COMMERCIAL AIRLINE, how far away from home will be likely you travel?



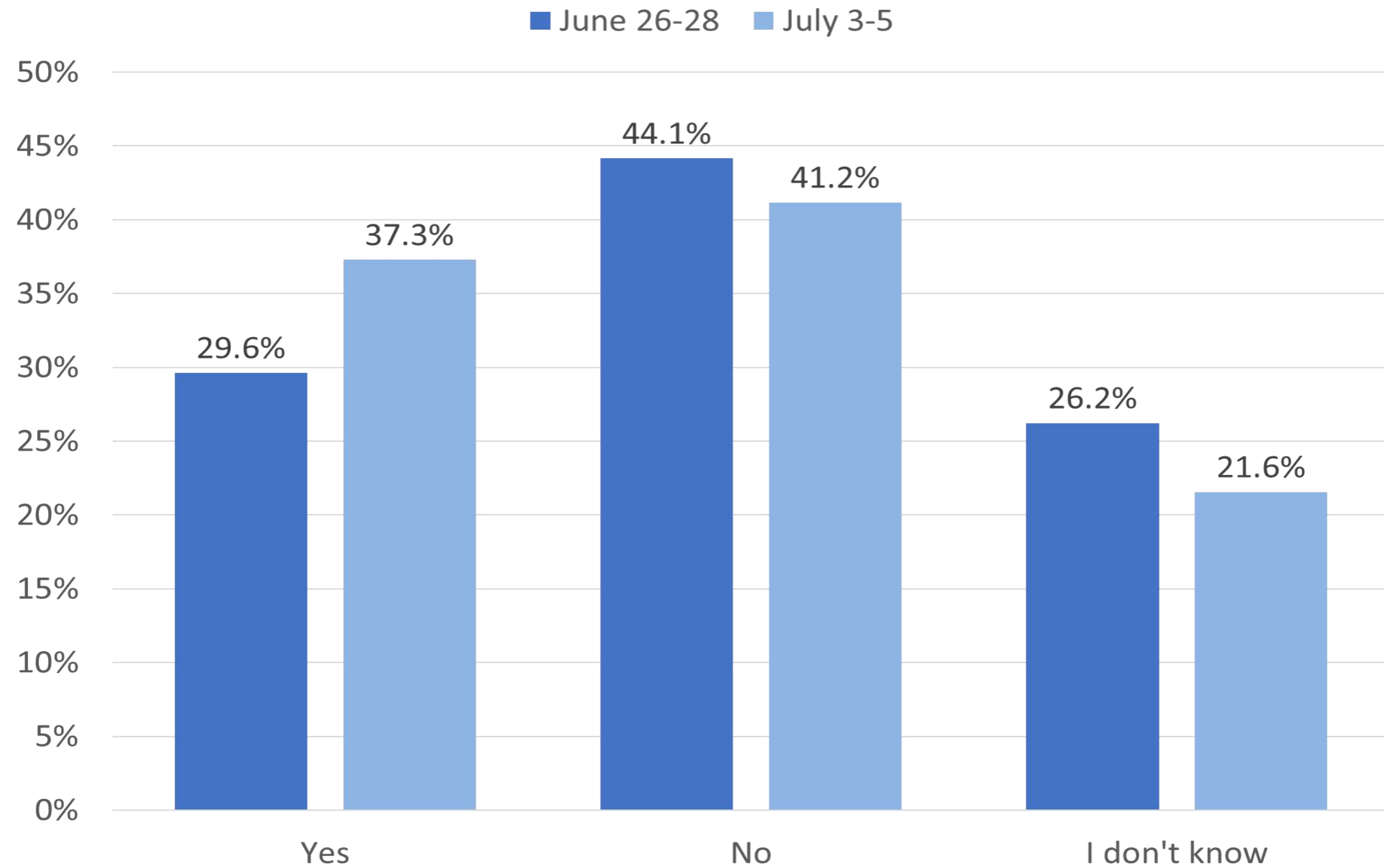
Destination Selection



Specific Destinations that Will be Avoided

Question: Thinking about LATER THIS YEAR (2020), are there any domestic destinations YOU MIGHT NORMALLY CONSIDER VISITING that you would now ABSOLUTELY NOT VISIT due to the Coronavirus situation?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Which Singers Do You Like?

Question: Which singers do you like?

(Write in as many as five)

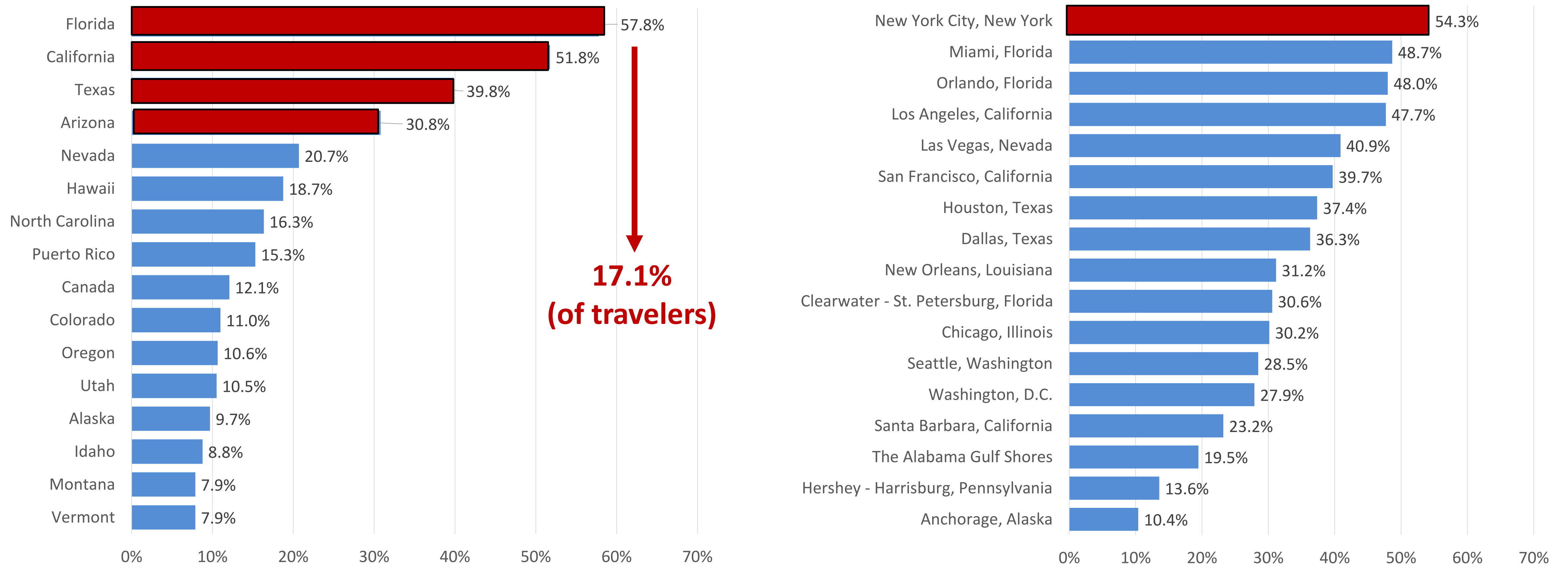
Question: Which singers do you like?

(Select all that apply)

- Beyoncé Knowles
- Aretha Franklin
- Ariana Grande
- Frank Sinatra
- Billie Eilish
- Lady Gaga
- Maria Carey

Travelers Who Will Not Visit Specific Destinations: Destinations that Will be Avoided

Question: What are the domestic destinations that you would absolutely not visit later this year? CLOSED_ENDED

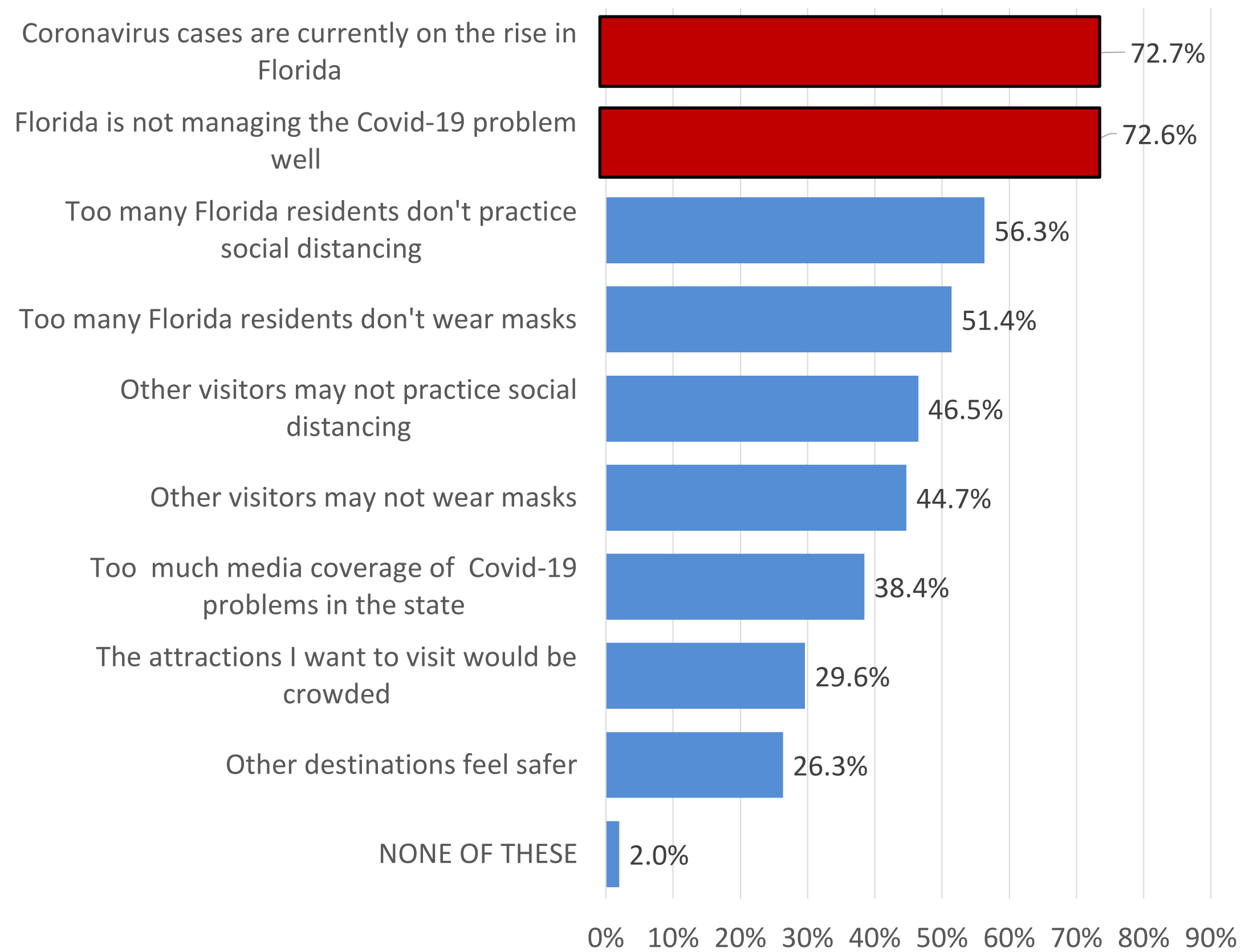


(Base: Respondents who would not visit specific destinations due to pandemic, 495 completed surveys. Data collected July 3-5, 2020)

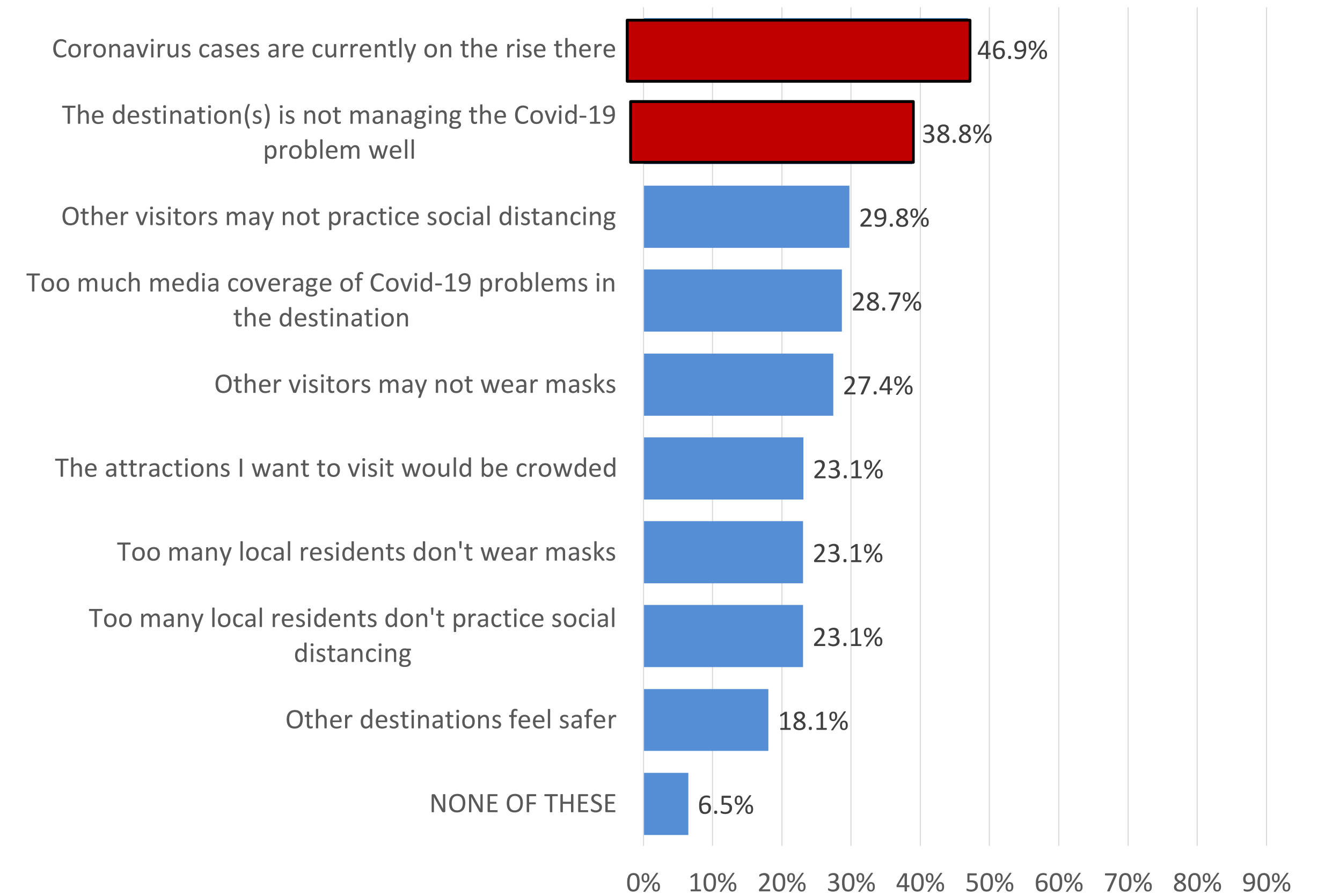
Reasons Specific Destinations Will be Avoided

Question: Please tell us why by selecting each item that contributes to you not wanting to visit the destination(s)

Travelers Unwilling to Visit Florida



Travelers Unwilling to Visit Other Destinations

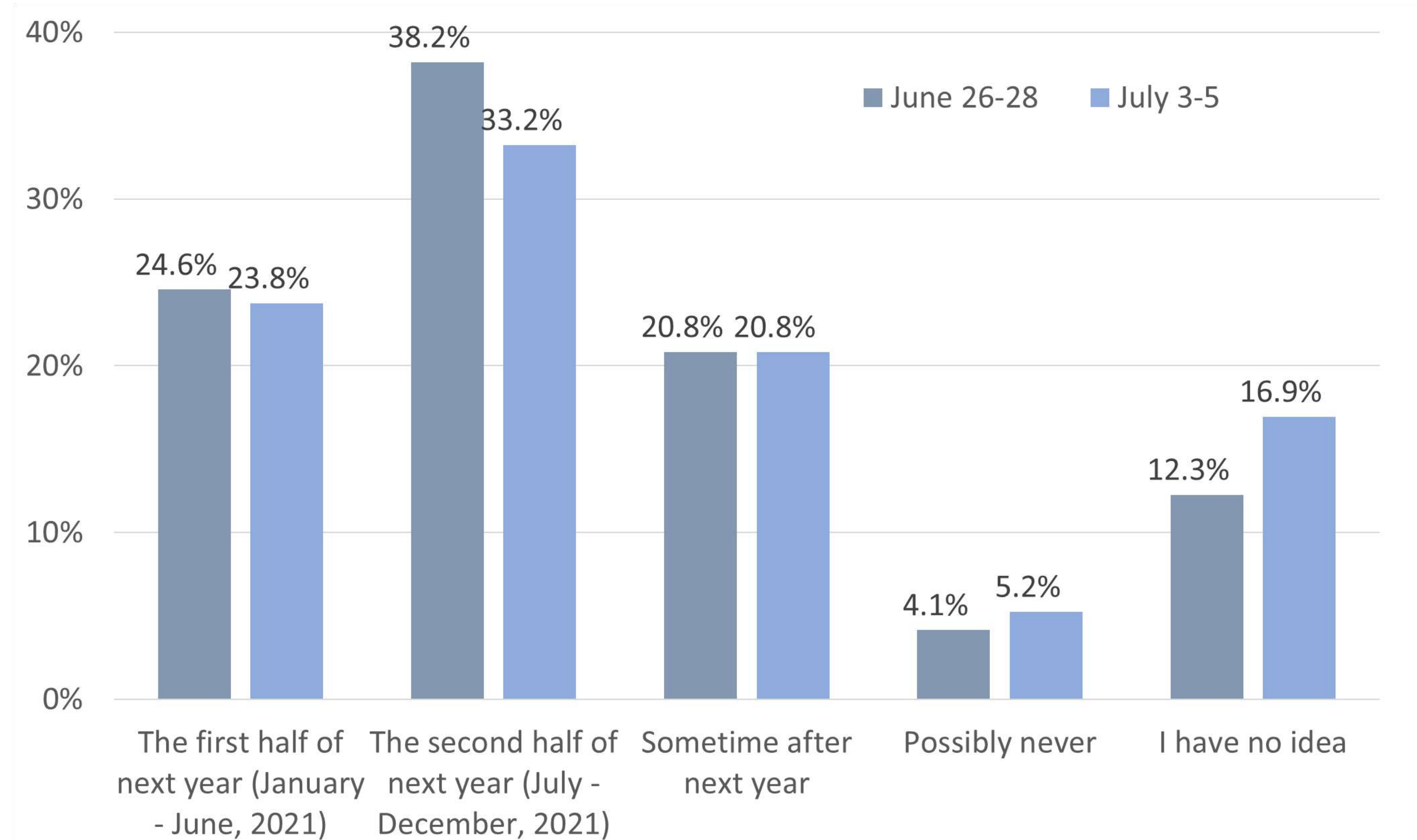


(Base: Respondents who would not visit Florida/other specific destinations due to pandemic, 495/306 completed surveys. Data collected July 3-5, 2020)

Travelers Who Will Not Visit Specific Destinations: When Will They Return?

Question: When do you expect you will feel comfortable visiting the destinations you listed? (Select the one that best describes you)

(Base: Respondents who would not visit specific destinations due to pandemic, 380 and 494 completed surveys. Data collected June 26-28 and July 3-5, 2020)



Most Talked About Coronavirus Hotspots

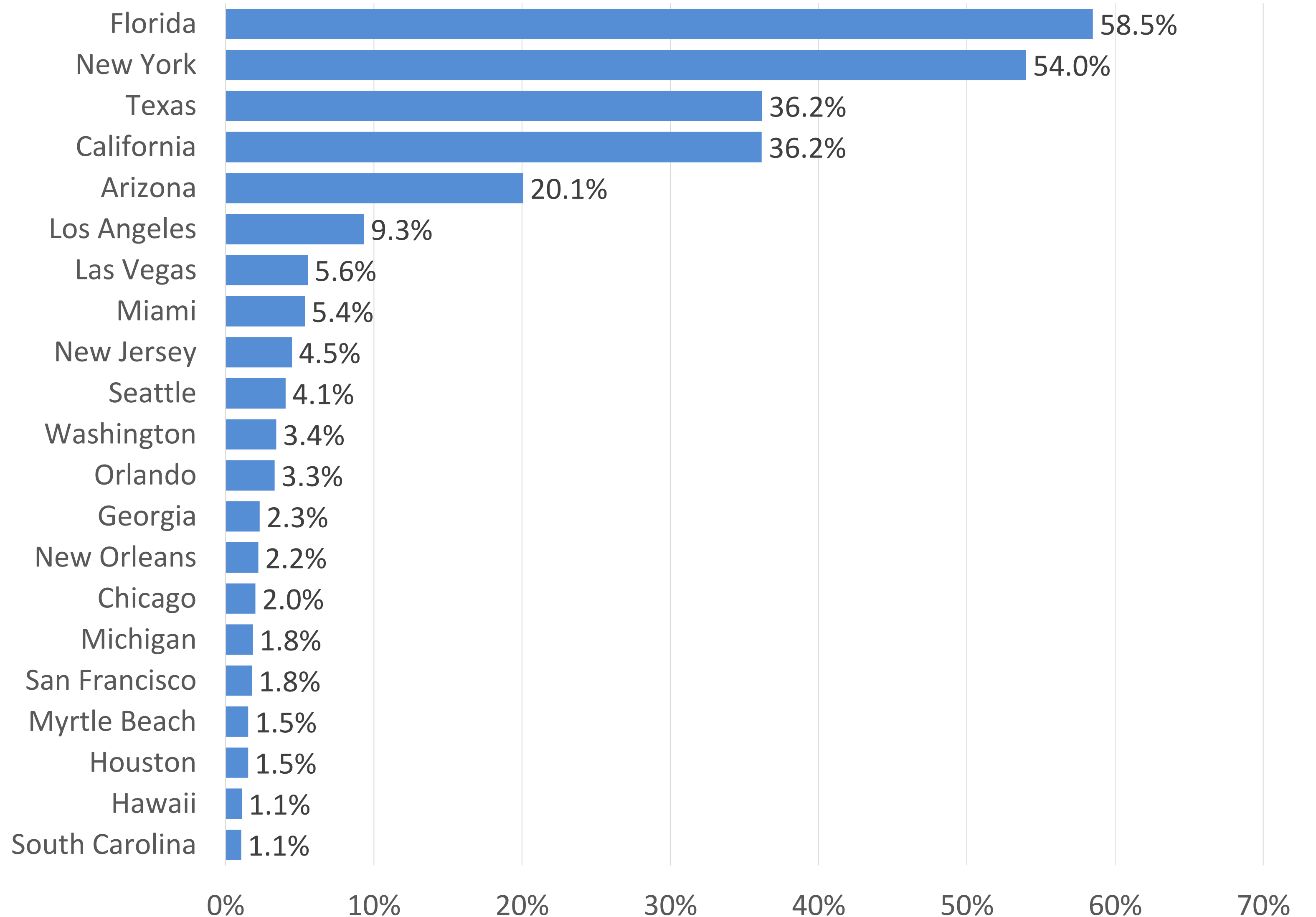
Question: What are the THREE (3)

U.S. travel destinations (if any) that

have been most talked about as

places with coronavirus issues?

(Base: Wave 17: All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)

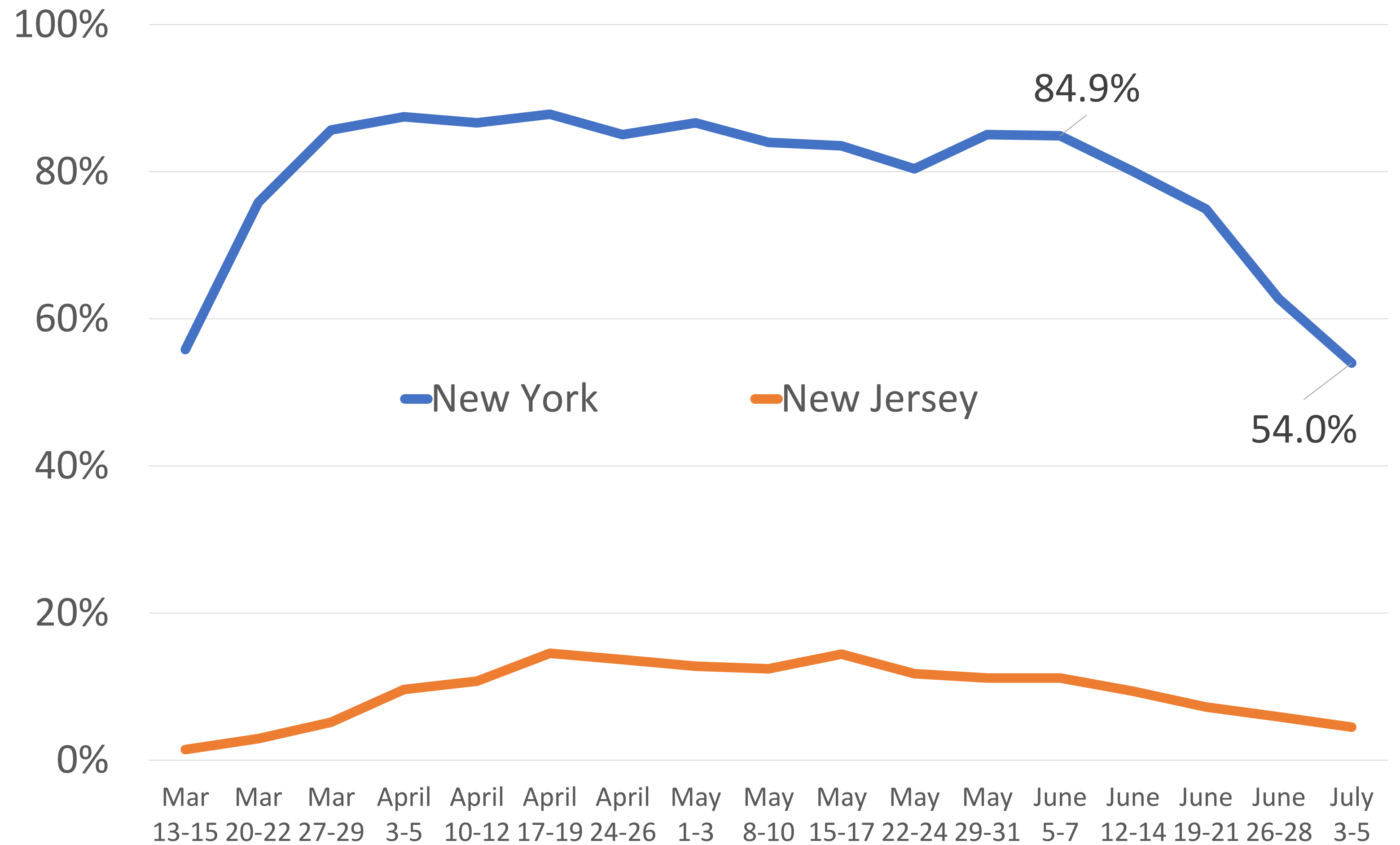


Most Talked About Coronavirus Hotspots: NEW YORK

Question: What are the THREE (3)

U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

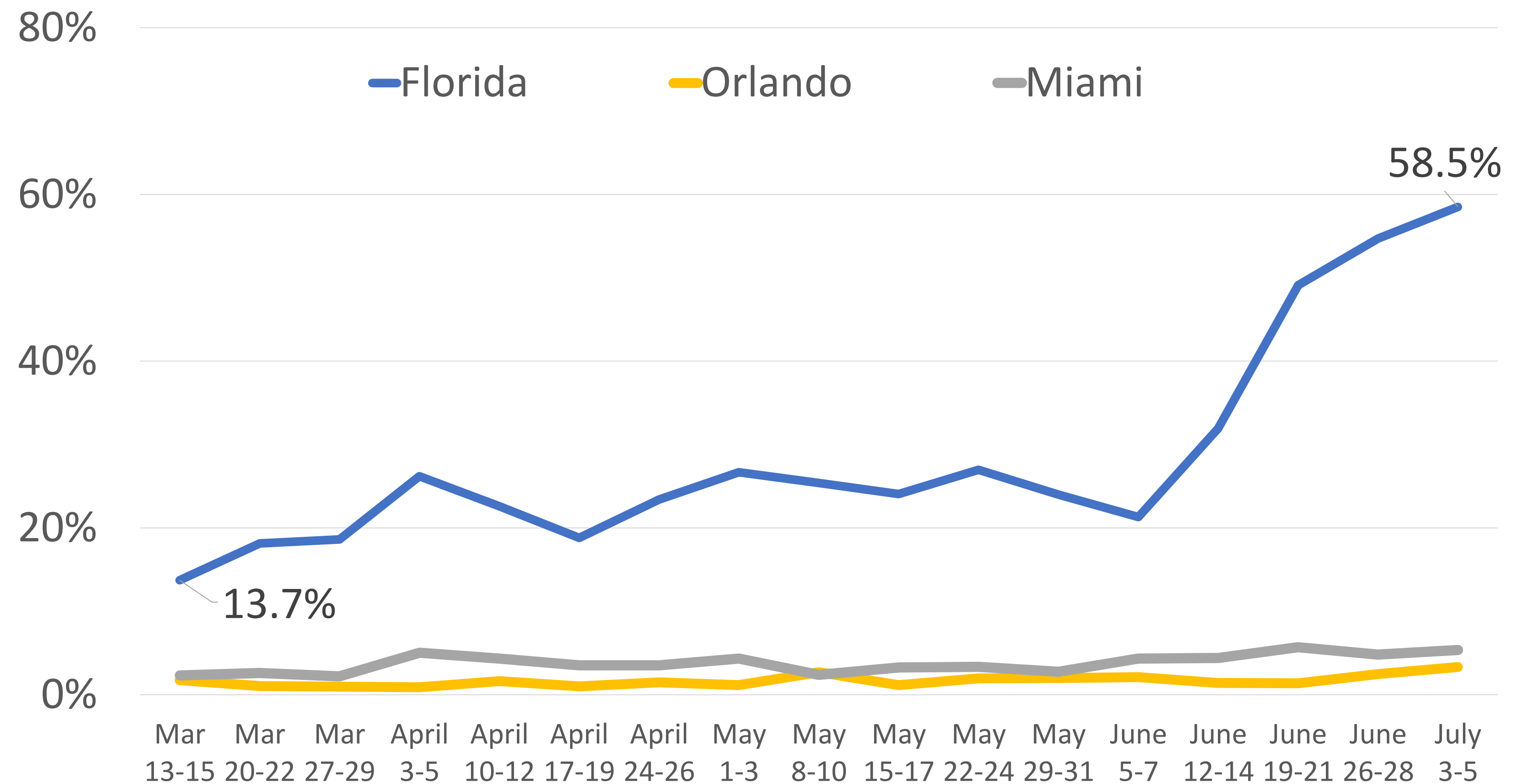


Most Talked About Coronavirus Hotspots: FLORIDA

Question: What are the THREE (3)

U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

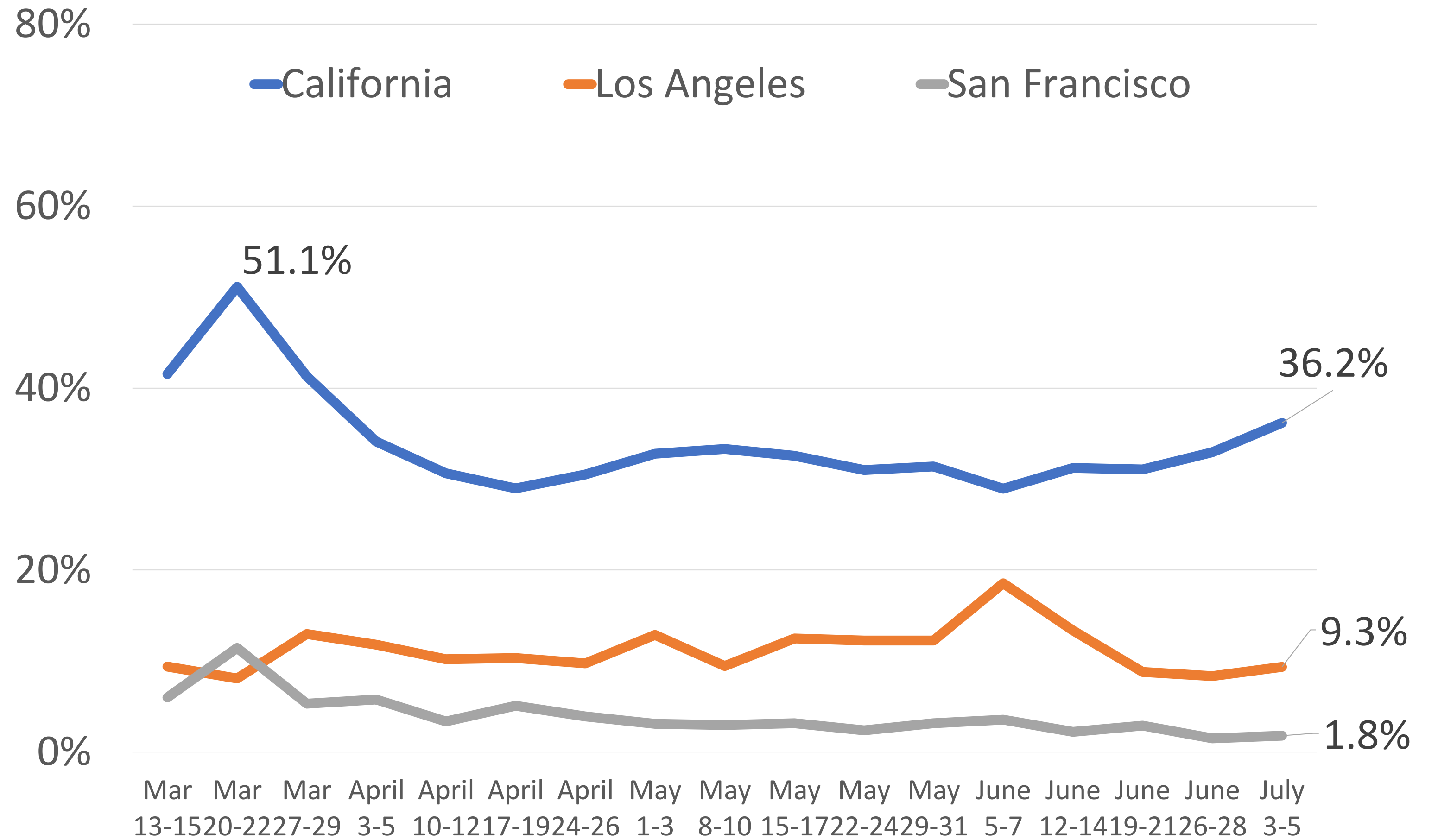


Most Talked About Coronavirus Hotspots: CALIFORNIA

Question: What are the THREE (3)

U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

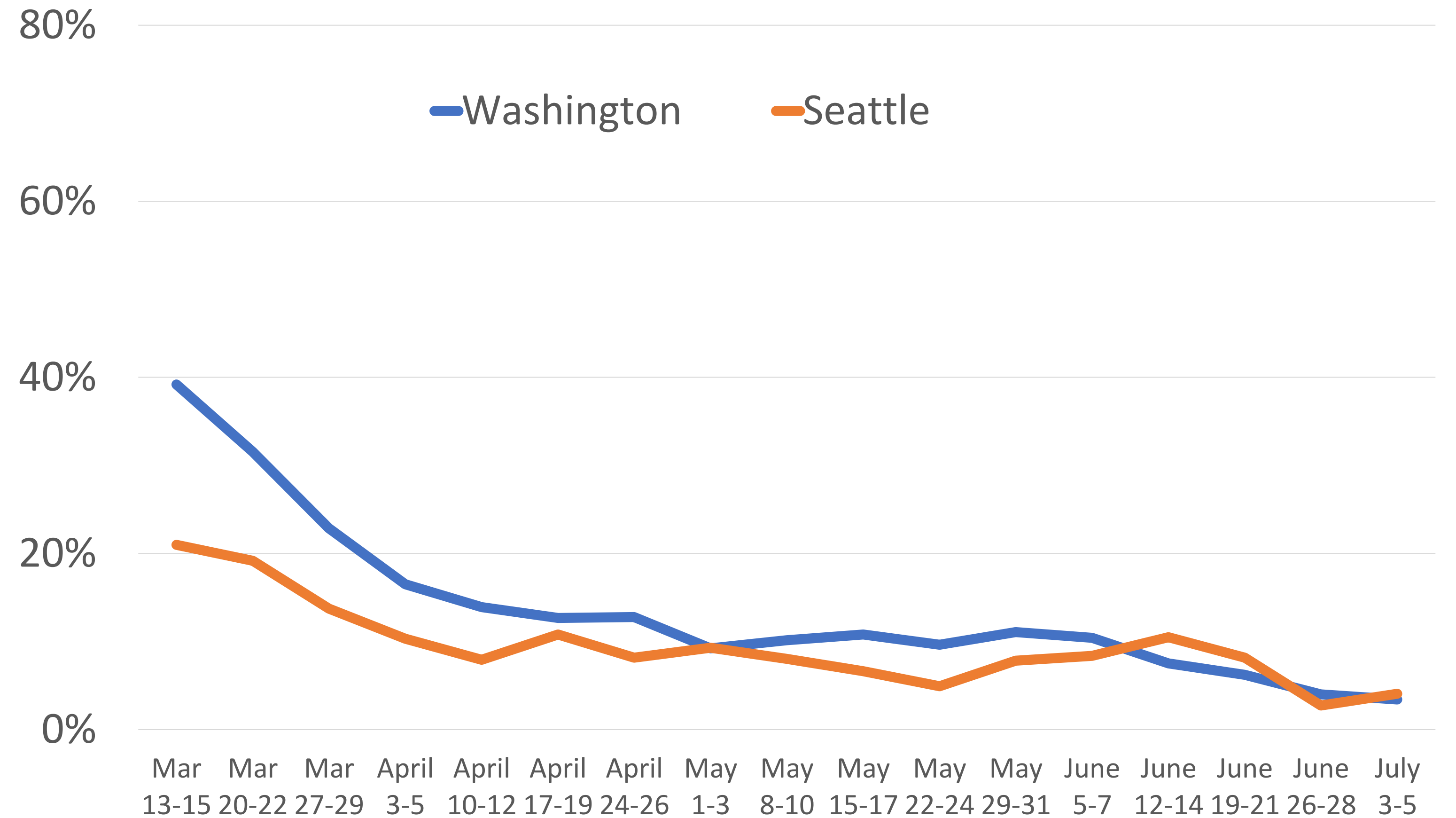


Most Talked About Coronavirus Hotspots: WASHINGTON

Question: What are the THREE (3)

U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Most Talked About Coronavirus Hotspots: TEXAS

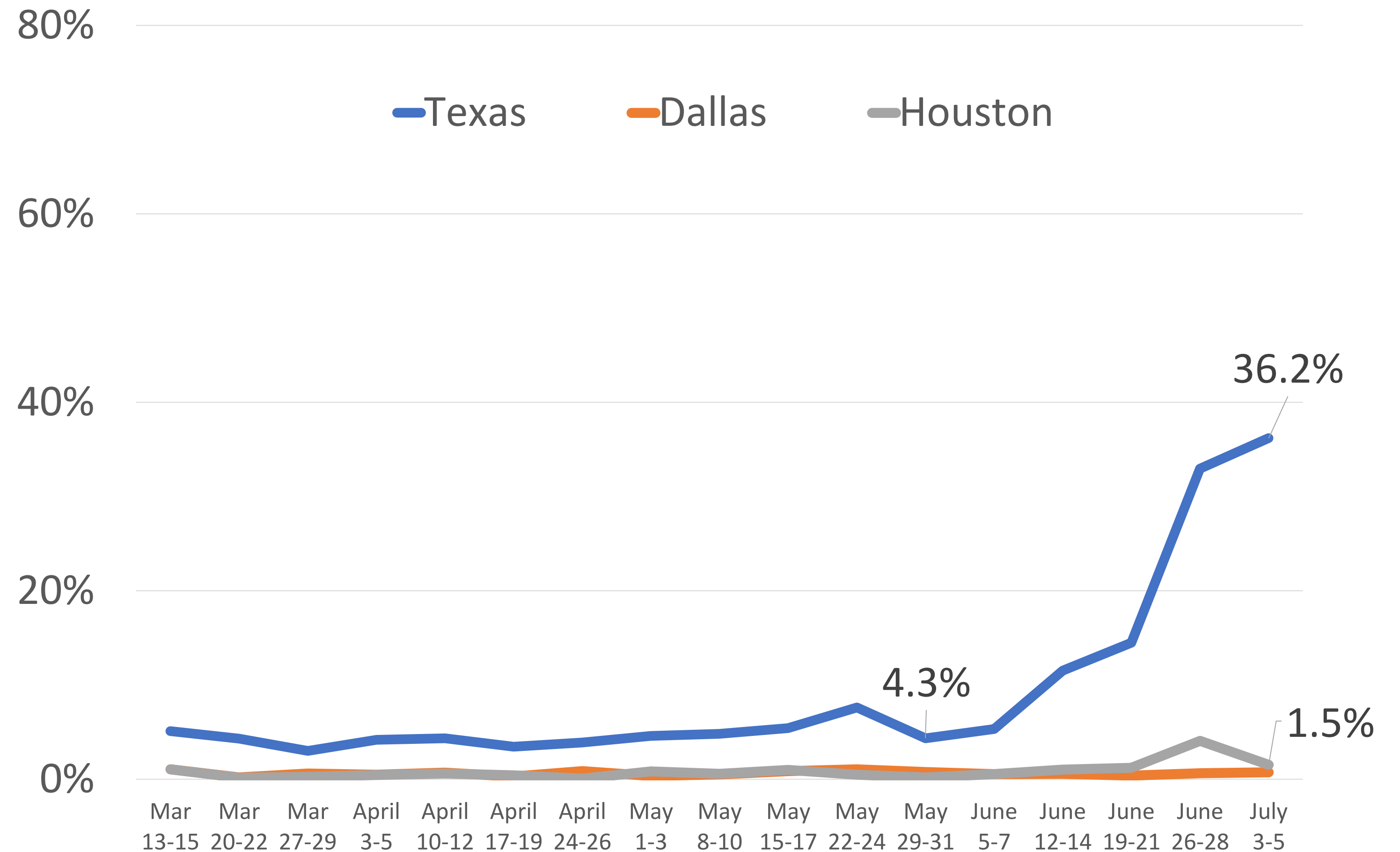
Question: What are the THREE (3)

U.S. travel destinations (if any) that

have been most talked about as

places with coronavirus issues?

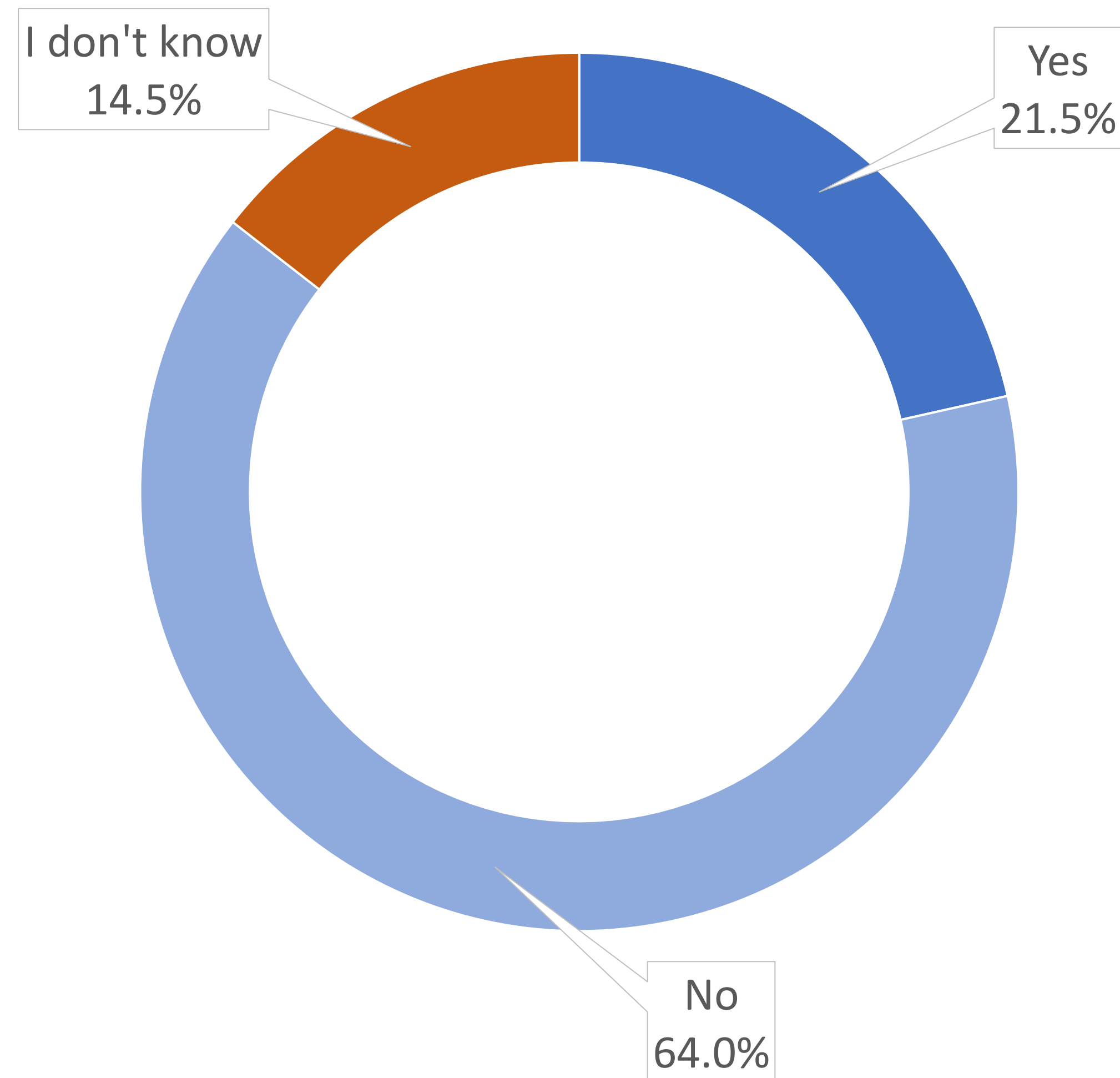
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Currently Considering Specific Destinations in 2020

Question: Are you currently considering visiting any specific leisure destinations during the remainder of 2020?

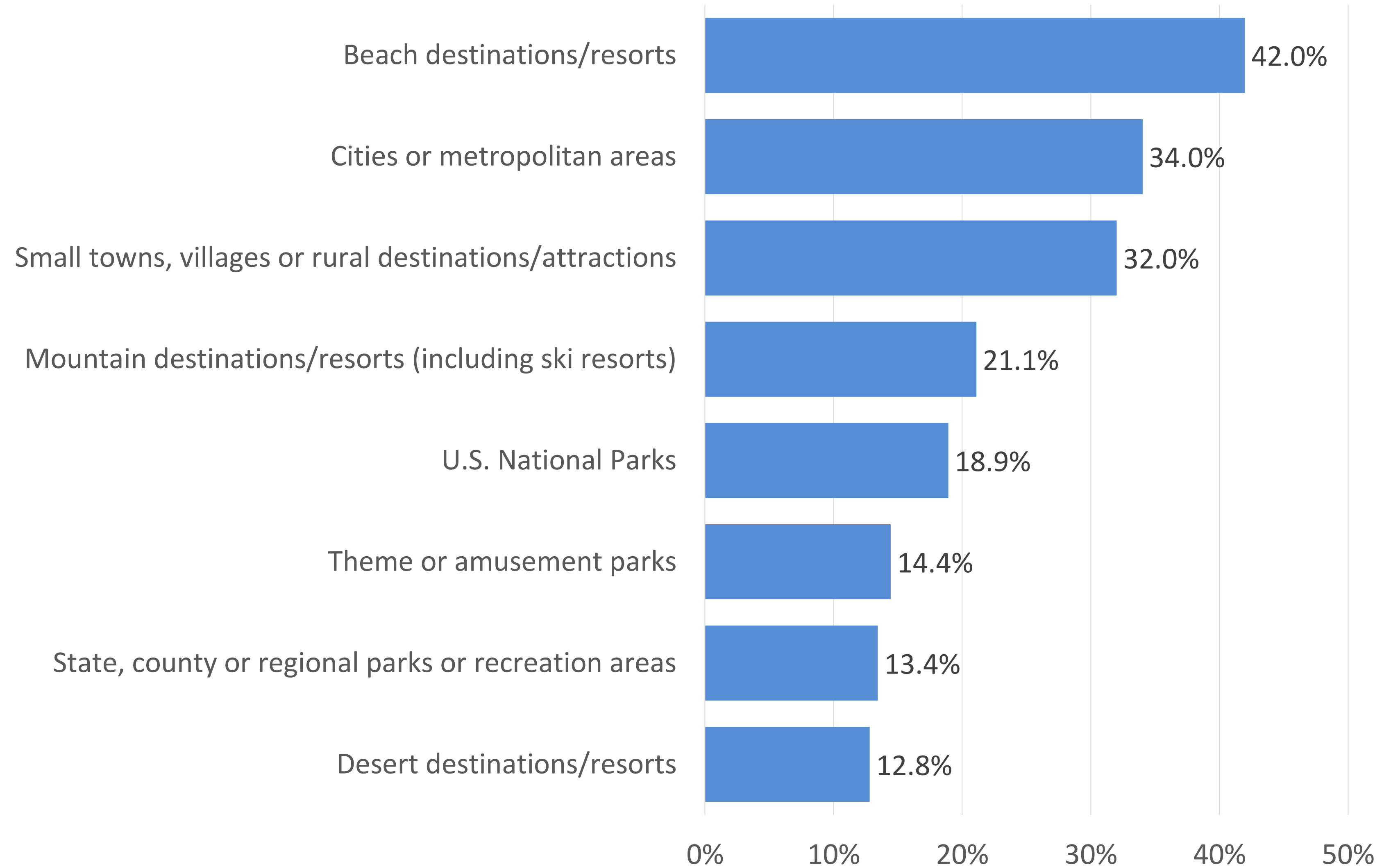
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



Specific Destination Types Considered in 2020

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

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



KEY TAKEAWAYS

- **Americans reported ability to be inspired to travel in the next three months—even under attractive conditions—has declined with the worsening of the pandemic**
- **The percent of Americans saying there are certain destinations they would normally consider visiting but now will absolutely not jumped dramatically the last week.**
- **Rising coronavirus cases and the perceived unsatisfactory management of the situation, as well as the expected poor behavior of other tourists is driving destination avoidance**
- **Still Americans are traveling and planning to. Americans who already have a destination(s) in mind for their 2020 leisure travel plans continue to show an affinity for beaches**



Desired Hotel Experience



Desired Hotel Sanitation Practices

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: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

TOP 3 MOST DESIRED HOTEL COVID-19 PRACTICES



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%)

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)

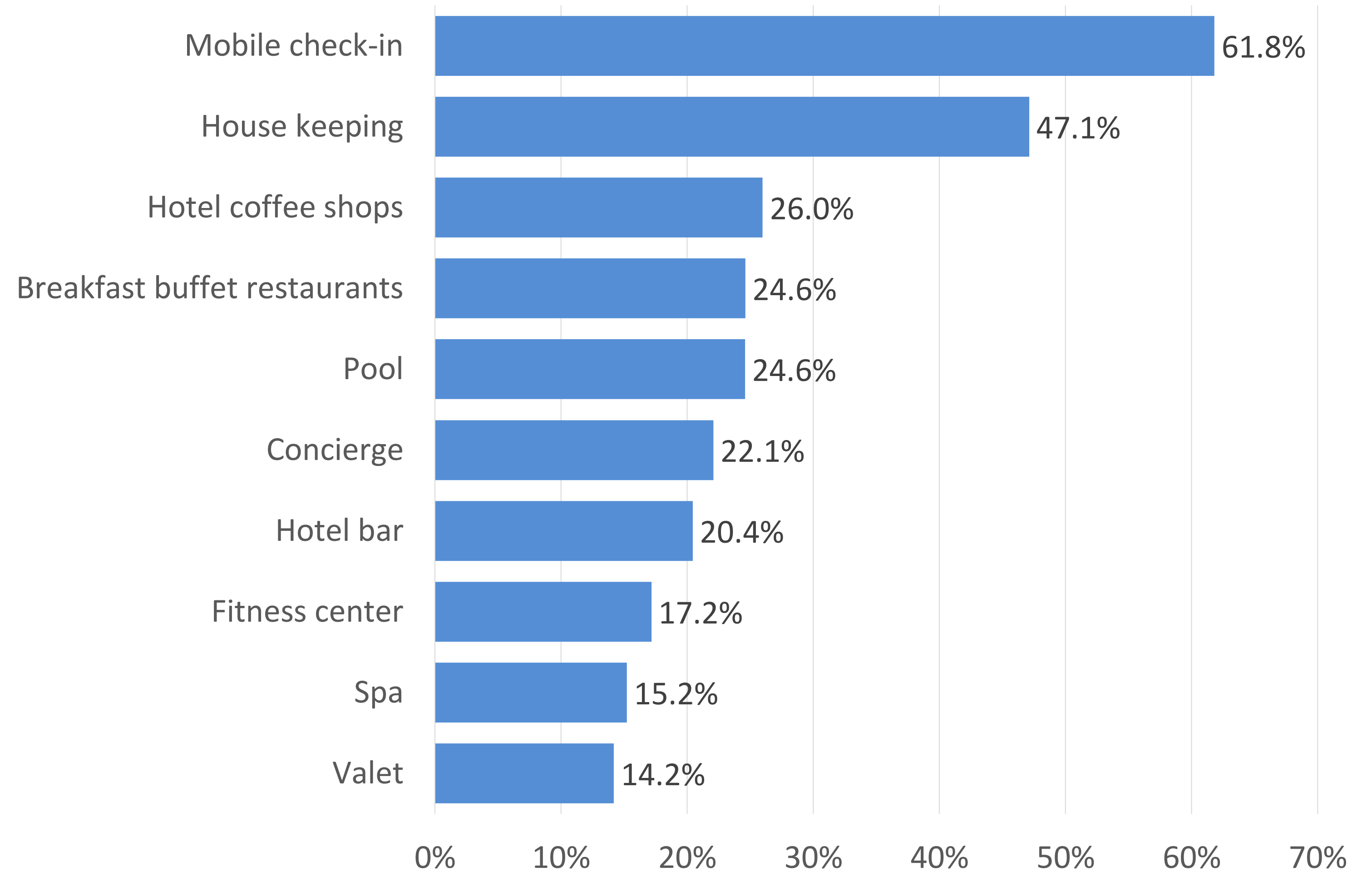
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

Likelihood of Using Hotel Services on Next Trip

Question: The next time you stay in a hotel, how likely would you be to use these features/services?

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

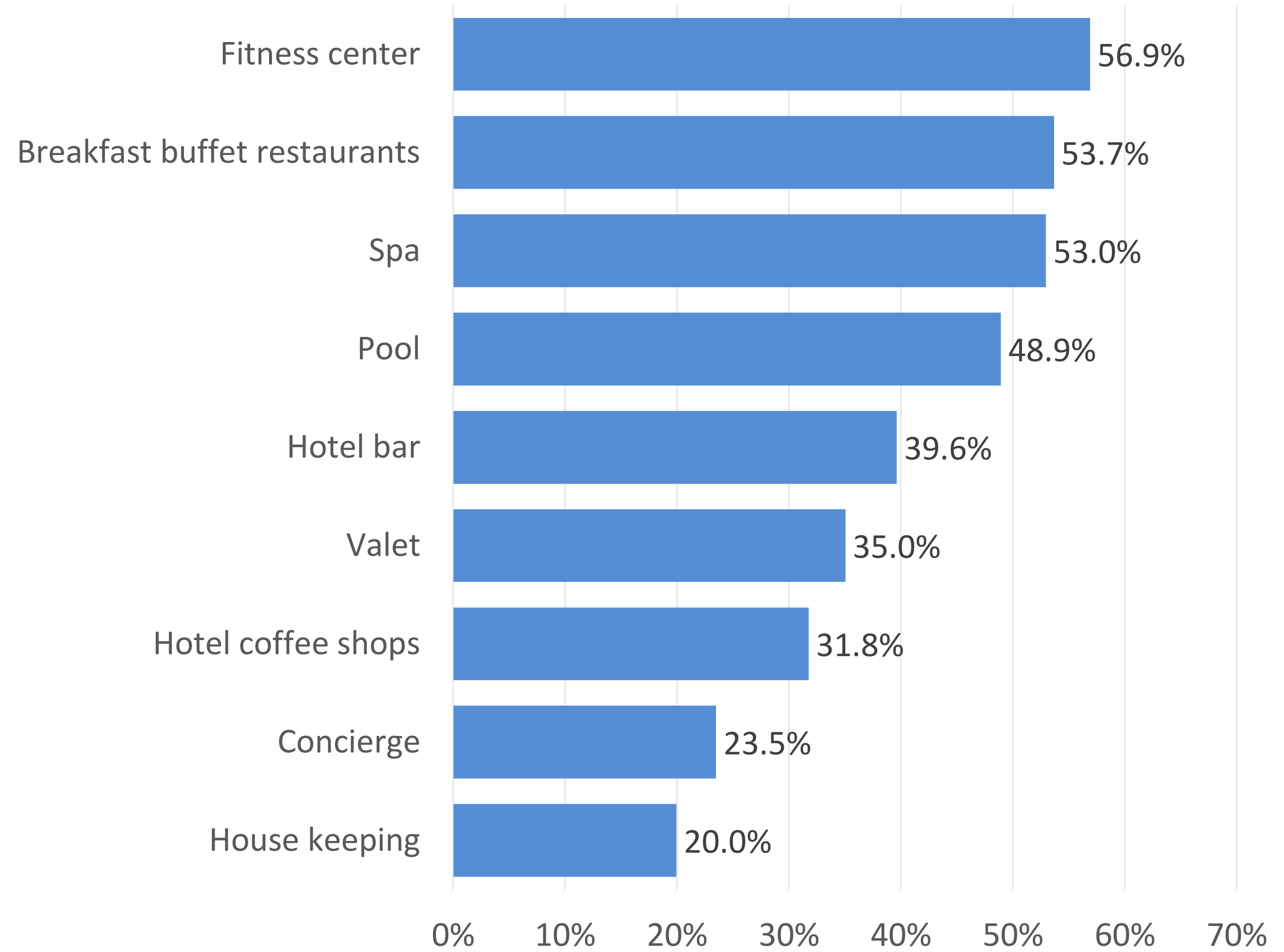
Top 2 Box Score: Likely or Very Likely



Hotel Services Travelers are Less Likely to Use Due to Pandemic

Question: The next time you stay in a hotel, which features/services (IF ANY) will you be LESS LIKELY TO USE as a result of the coronavirus situation? (Select all that apply)

(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)



KEY TAKEAWAYS

- **American travelers' sense for cleanliness and social distancing will be heightened in a hotel**
- **They will expect services that align with these feelings and avoid those that don't, including those that put them in potential contact with other travelers and hotel staff**



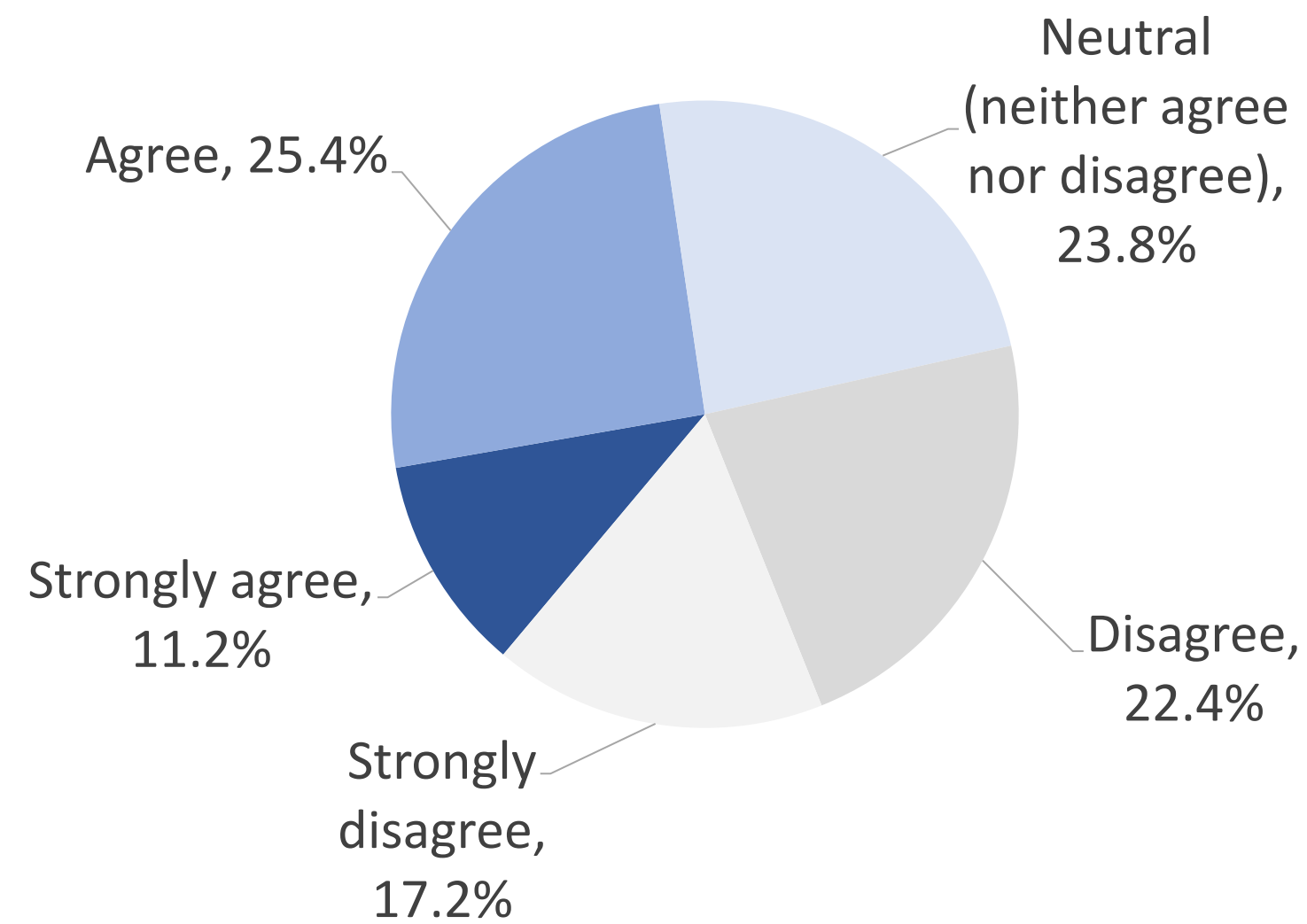


Tourism At Home

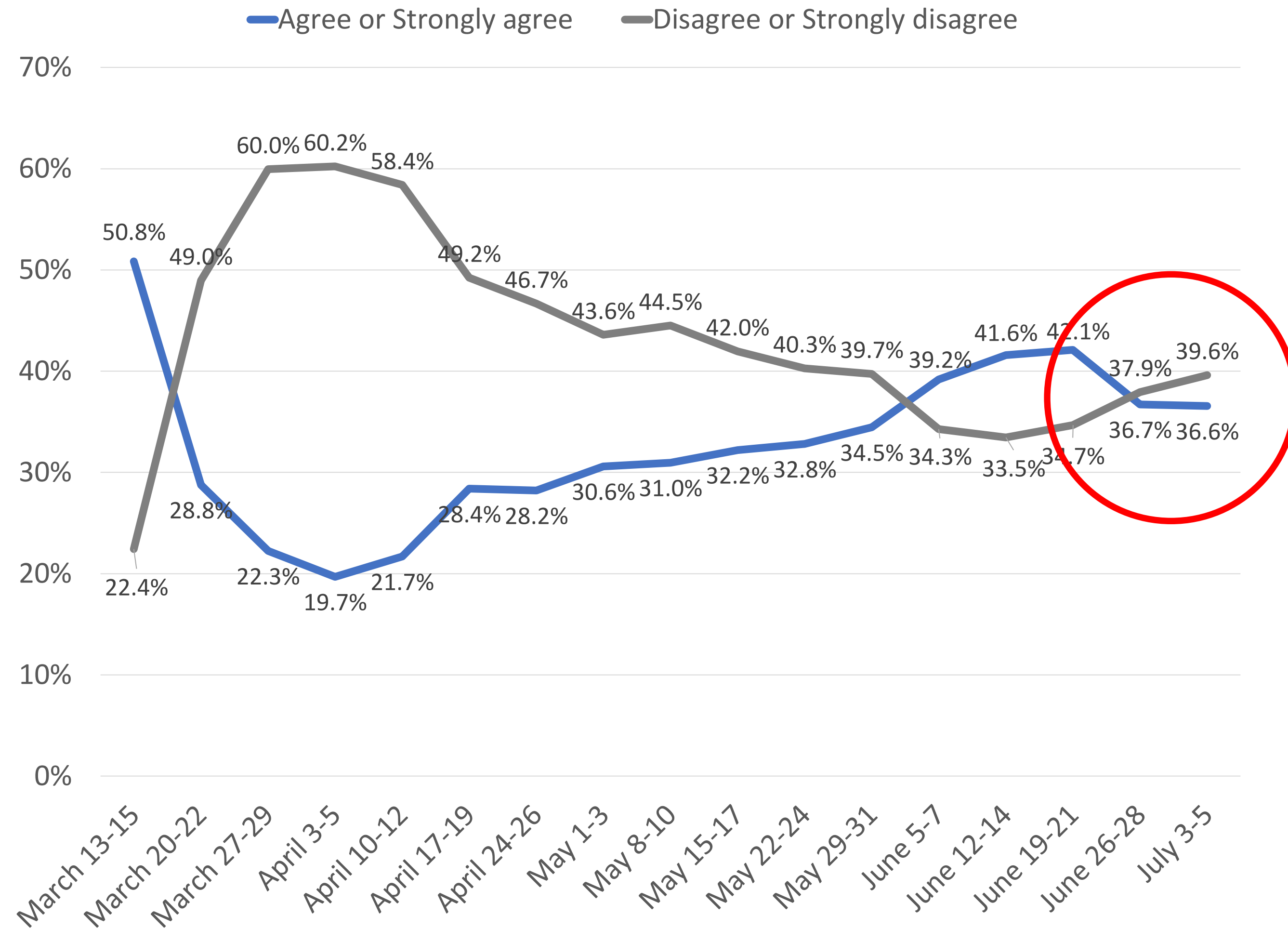
Comfort Enjoying Home Community

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.



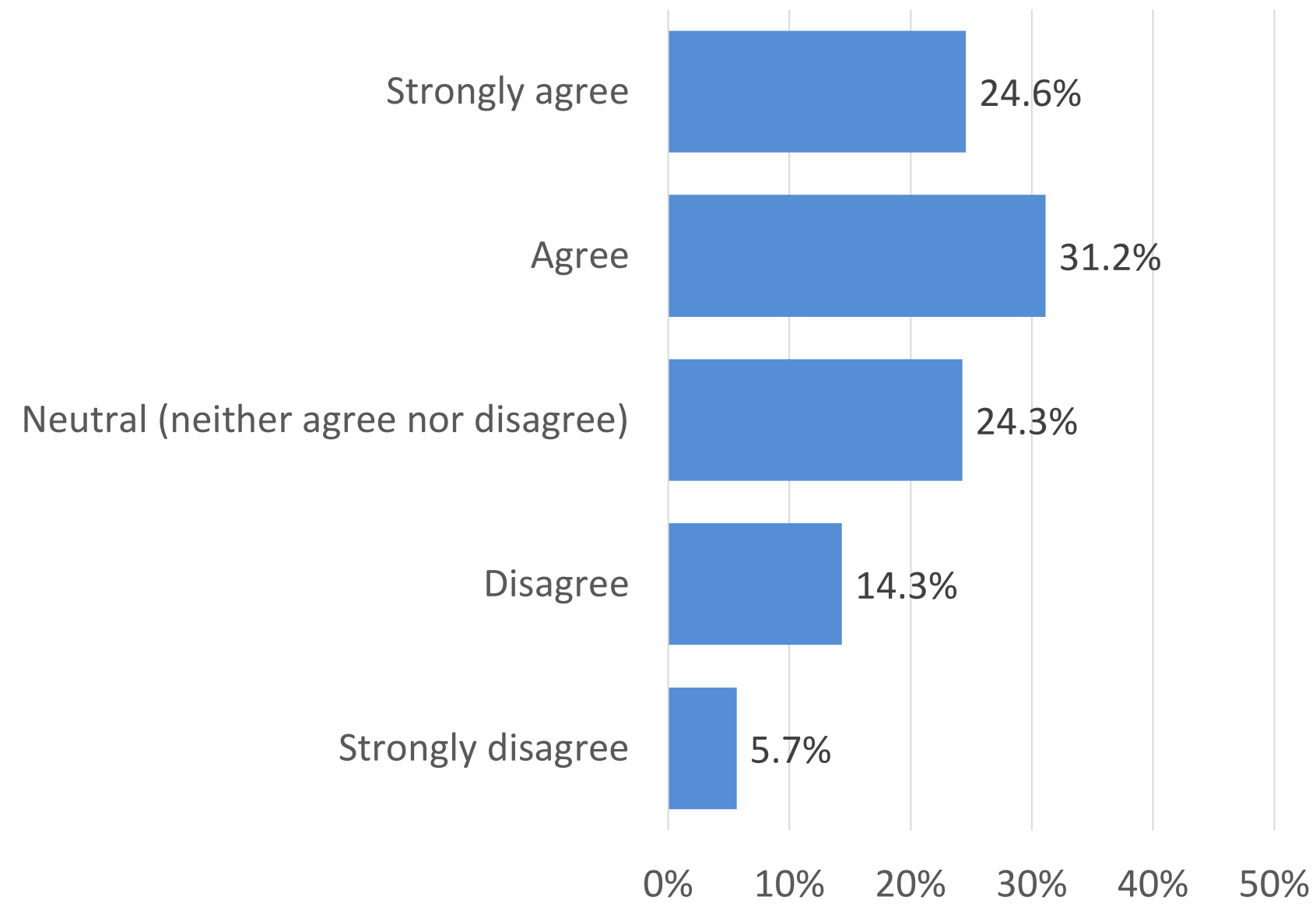
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)



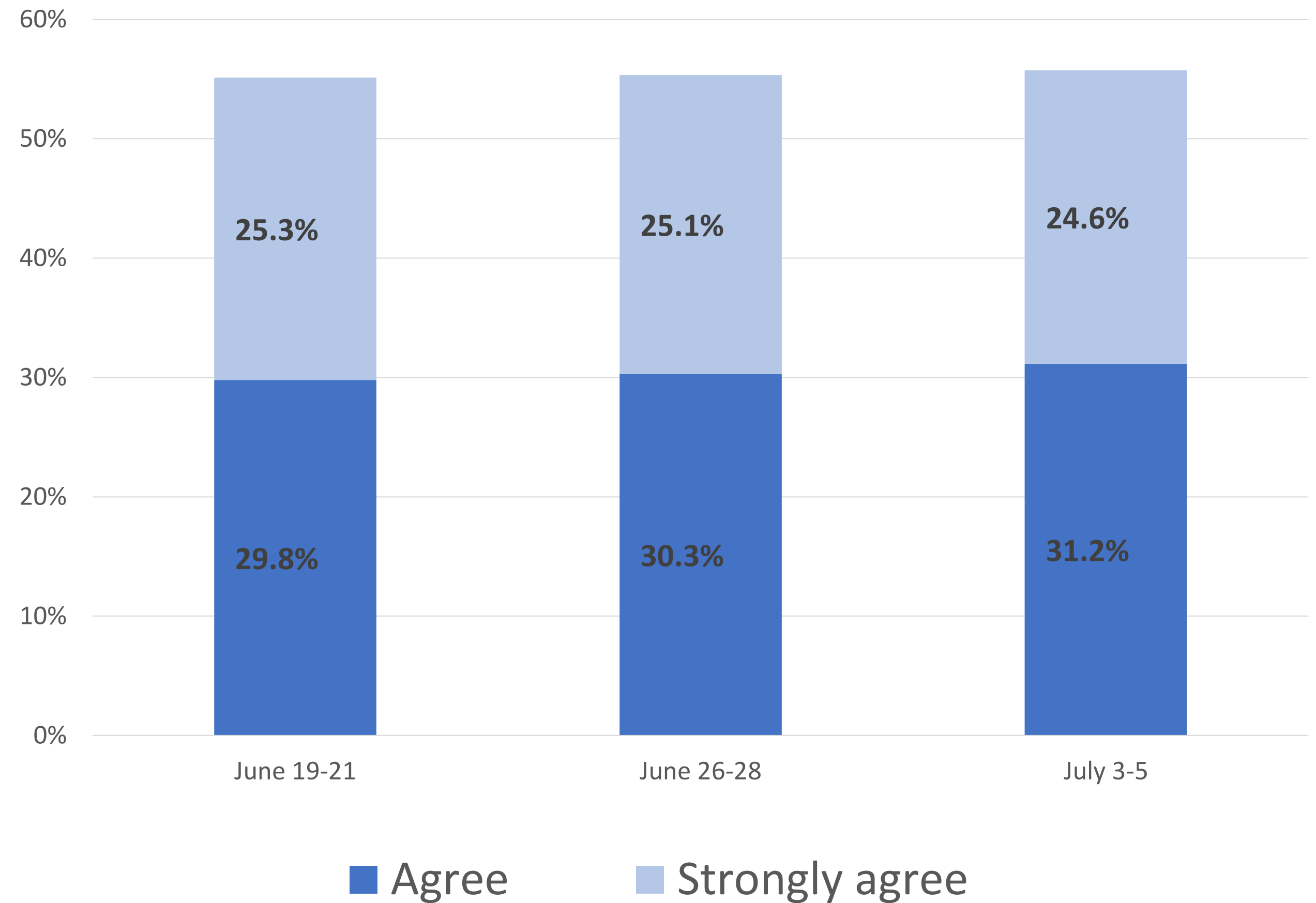
Community Face Mask Wearing

How much do you agree with the following statement?

Statement: In my community, too many people are not wearing face masks in public.



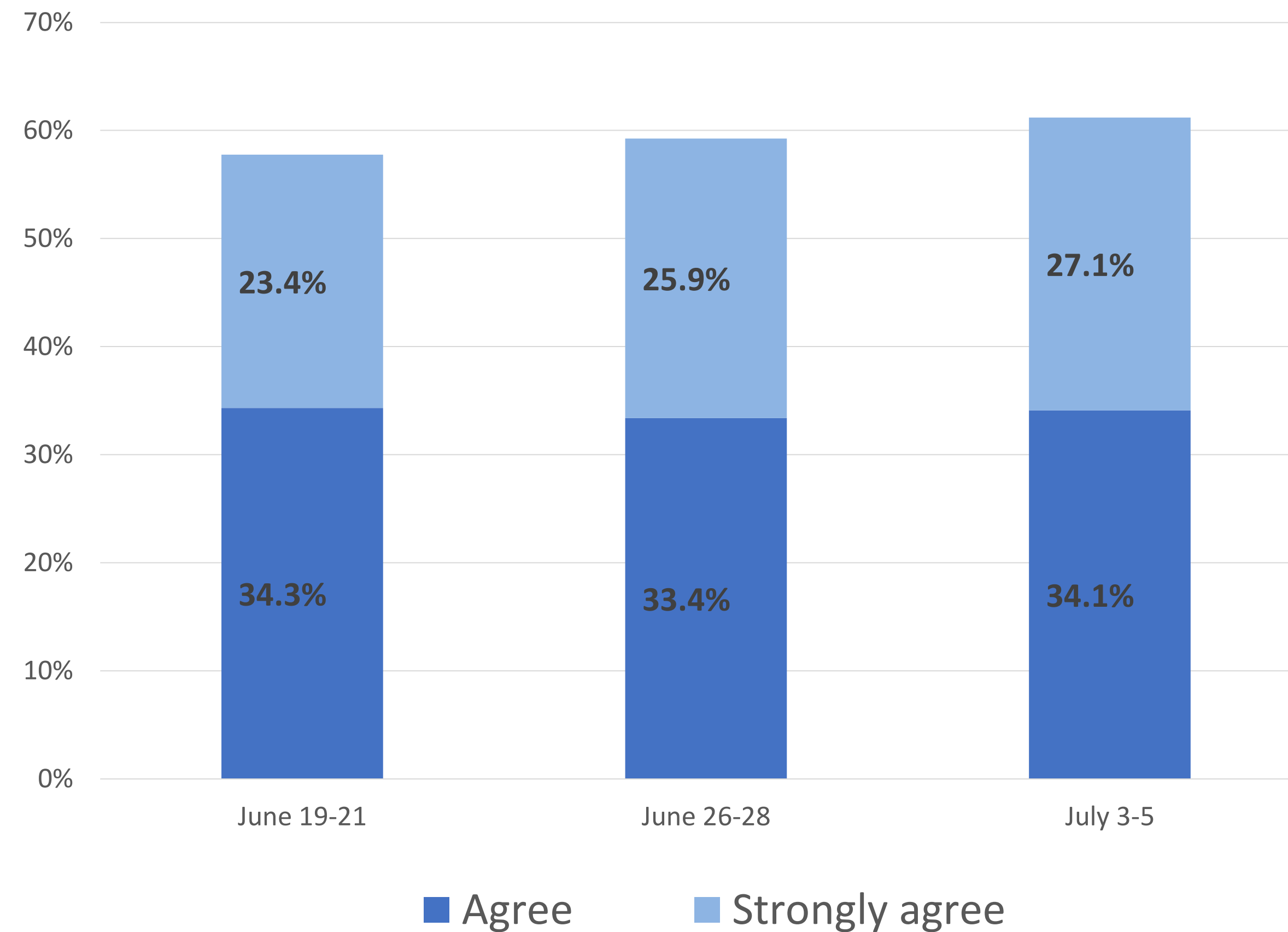
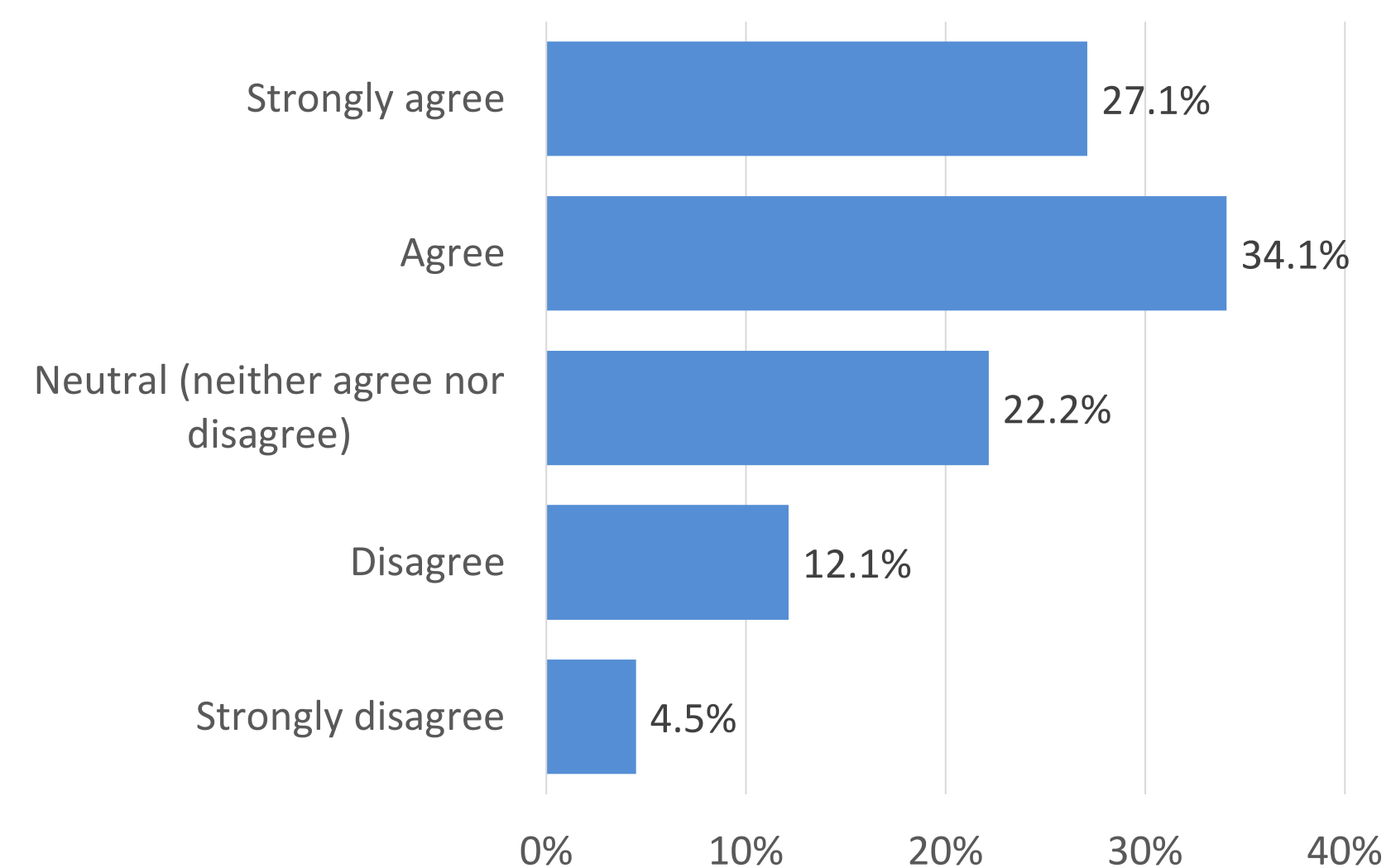
(Base: All respondents, 1,205, 1,231 and 1,365 completed surveys. Data collected June 19-21, 26-28 and July 3-5, 2020)



Community Social Distancing

How much do you agree with the following statement?

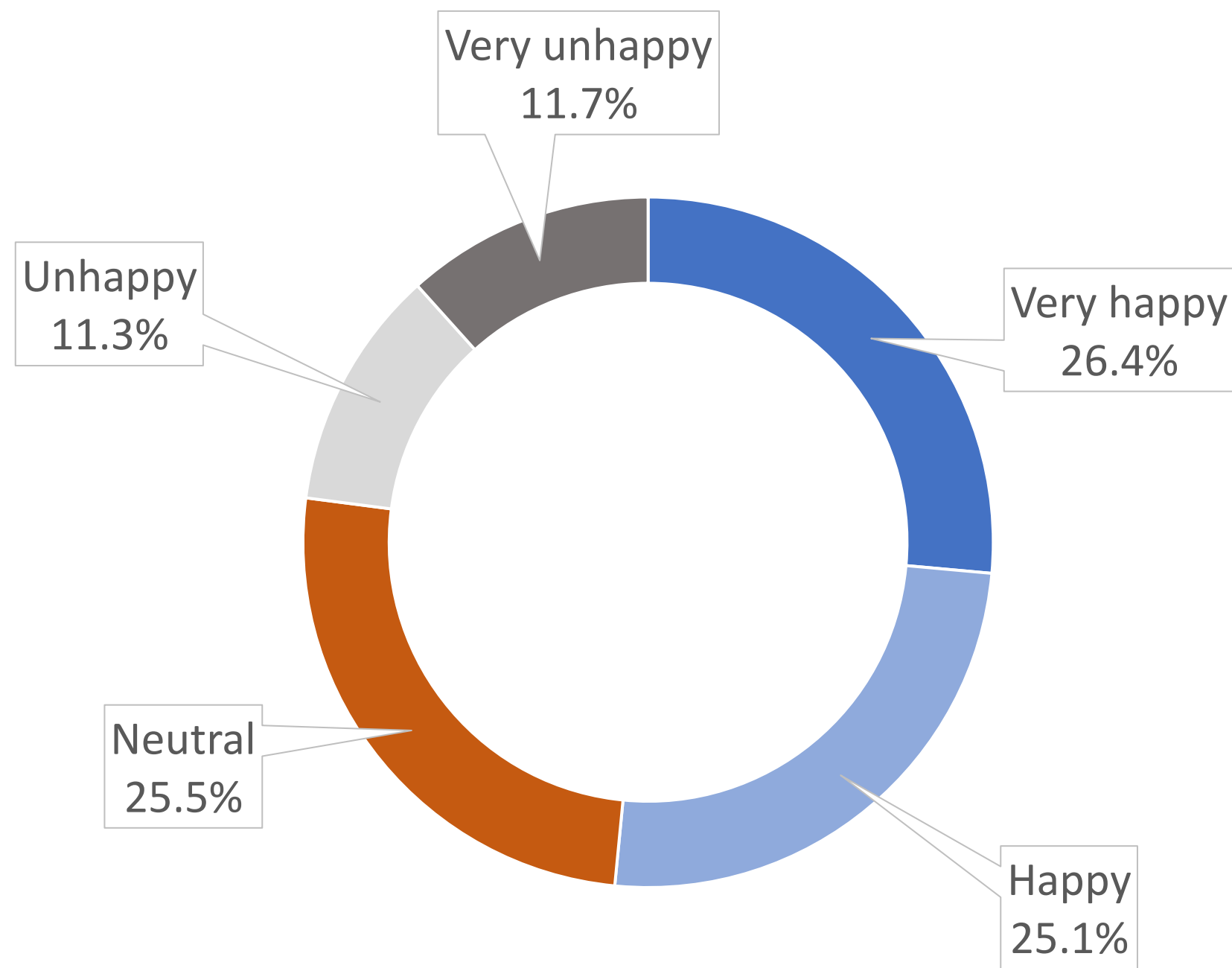
Statement: In my community, too many people are NOT maintaining appropriate social distancing when in public.



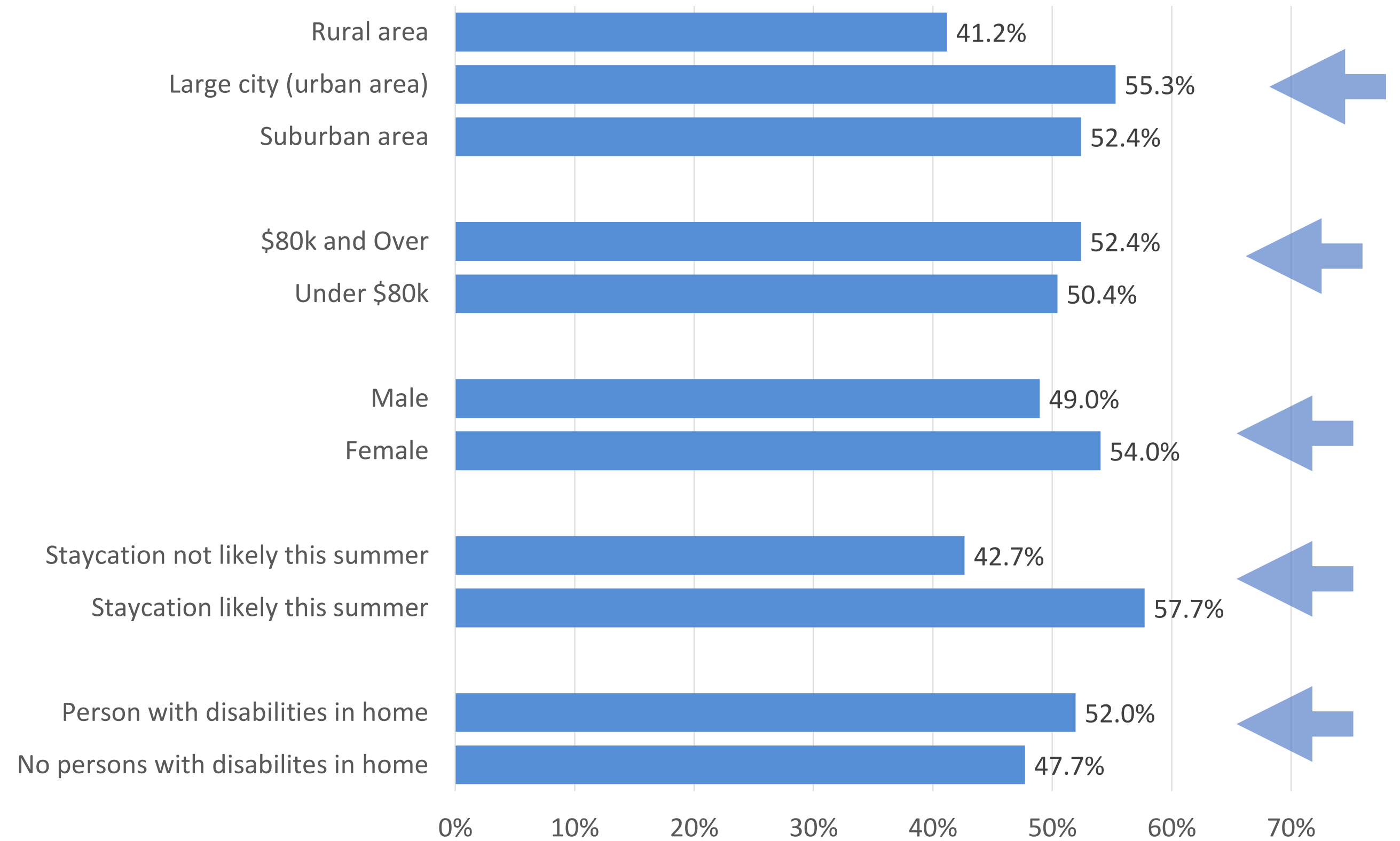
(Base: All respondents, 1,205, 1,231 and 1,365 completed surveys. Data collected June 19-21, 26-28 and July 3-5, 2020)

Opinions on Tickets/Fines for Not Wearing Masks

Question: Which best describes how you would feel if a destination you wanted to visit was giving tickets/fines to people who do not wear face masks in public?

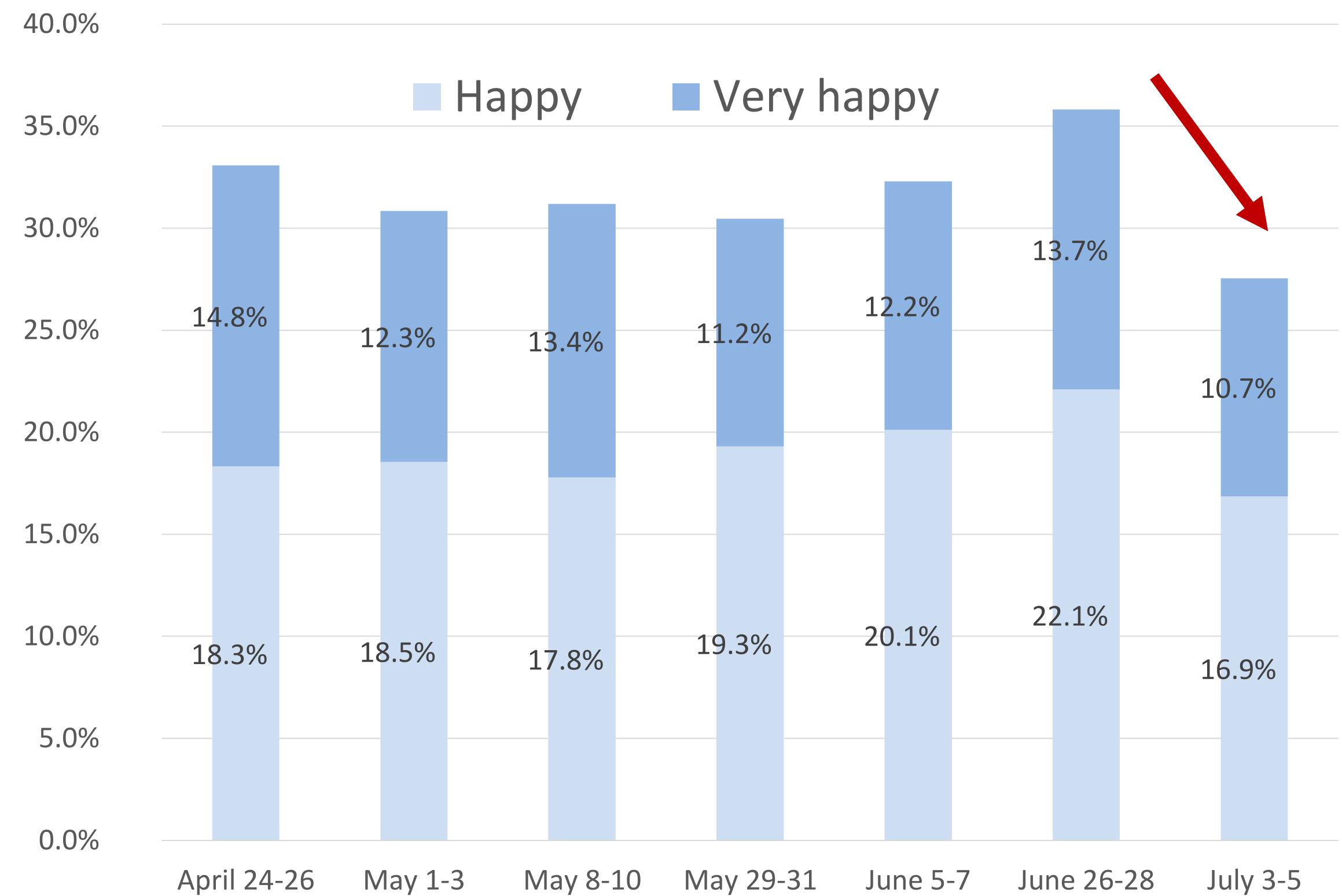
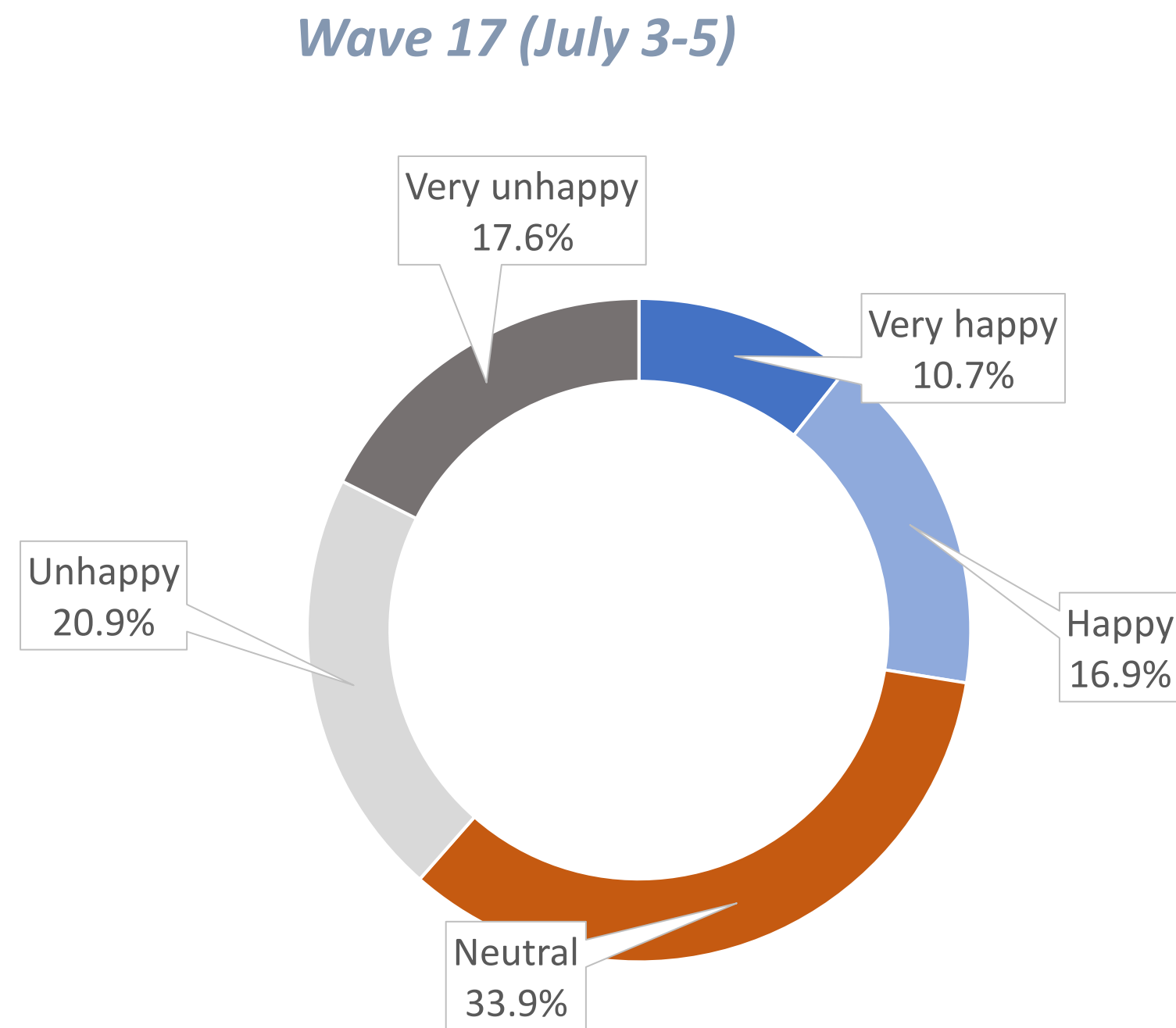


Top 2-Box Scores (% Happy or Very Happy)



Advertising Their Own Communities

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?

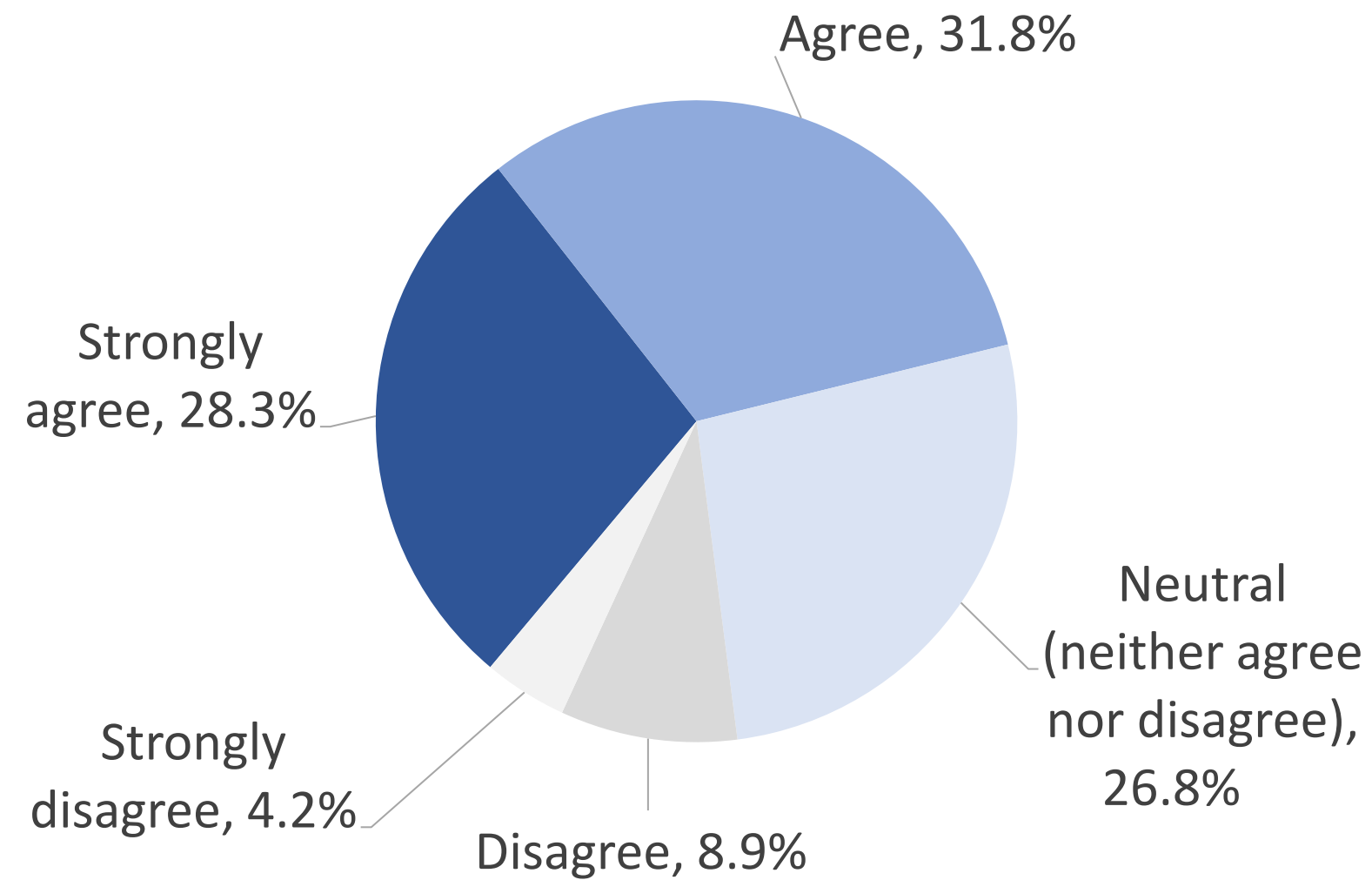


(Base: All respondents, 1,198, 1,199, 1,195, 1,250, 1,203, 1,231 and 1,365 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28 and July 3-5, 2020)

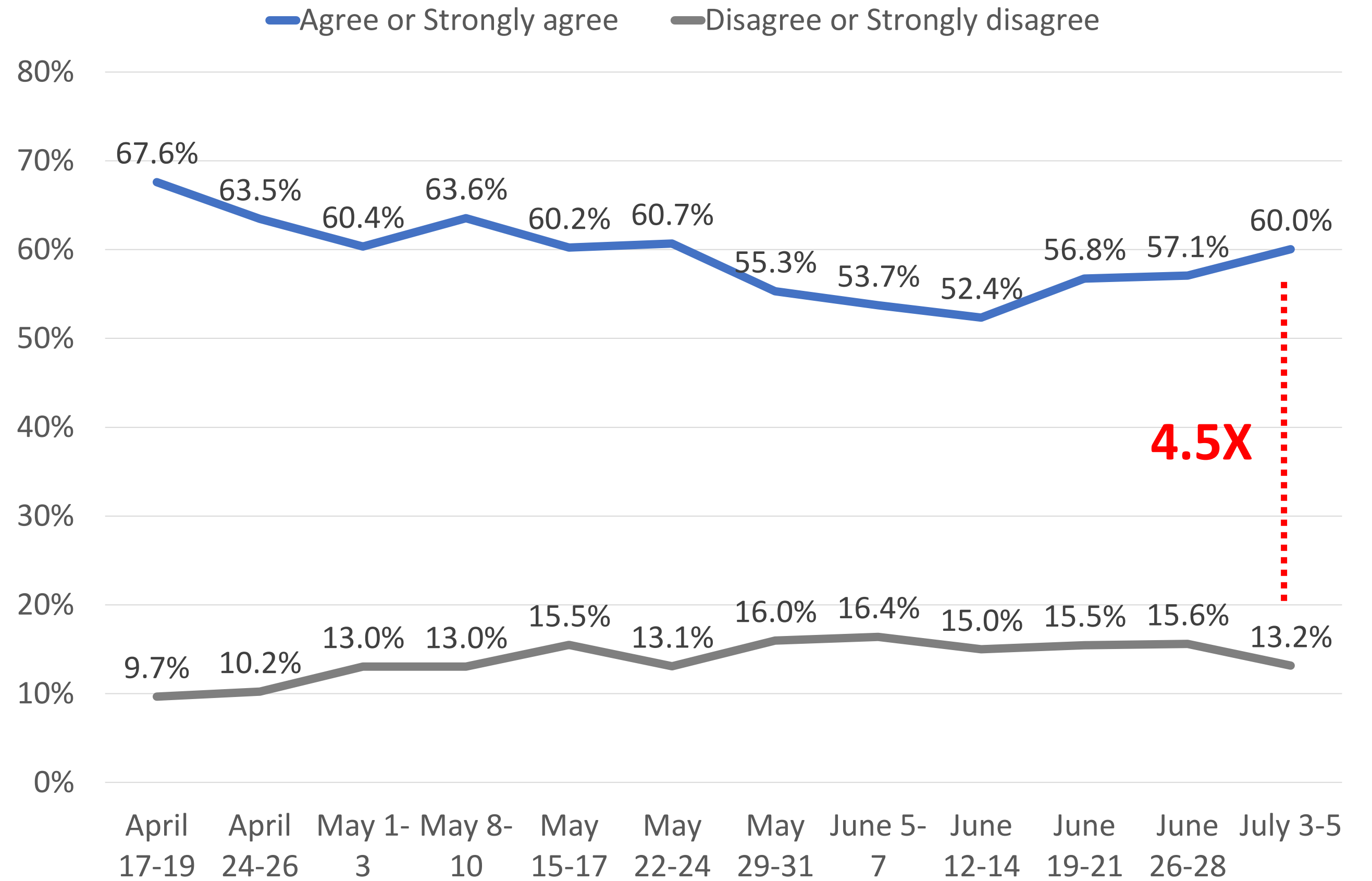
Travelers in Community are Unwanted

How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 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)



KEY TAKEAWAYS

- **Perceptions of a worsening coronavirus situation in the United States has impacted openness to tourism in Americans' own communities, in addition to their own personal travel**
- **Americans continue to observe poor pandemic etiquette in their own communities**
- **Support for mask enforcement is notable**



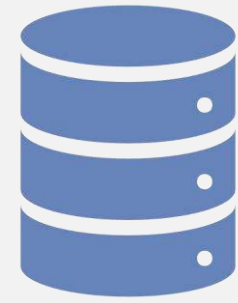


Coronavirus Travel Sentiment Index

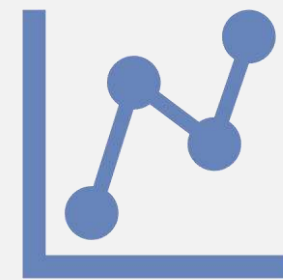
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 6th

What is a Predictive Index?



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



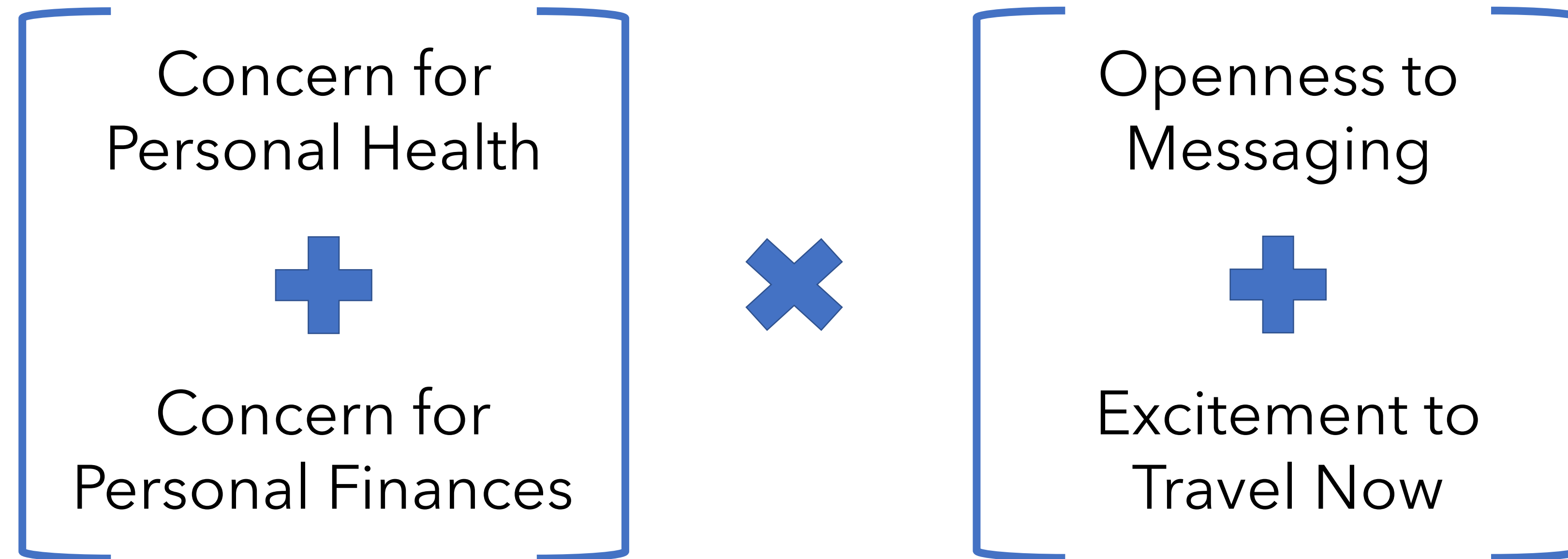
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

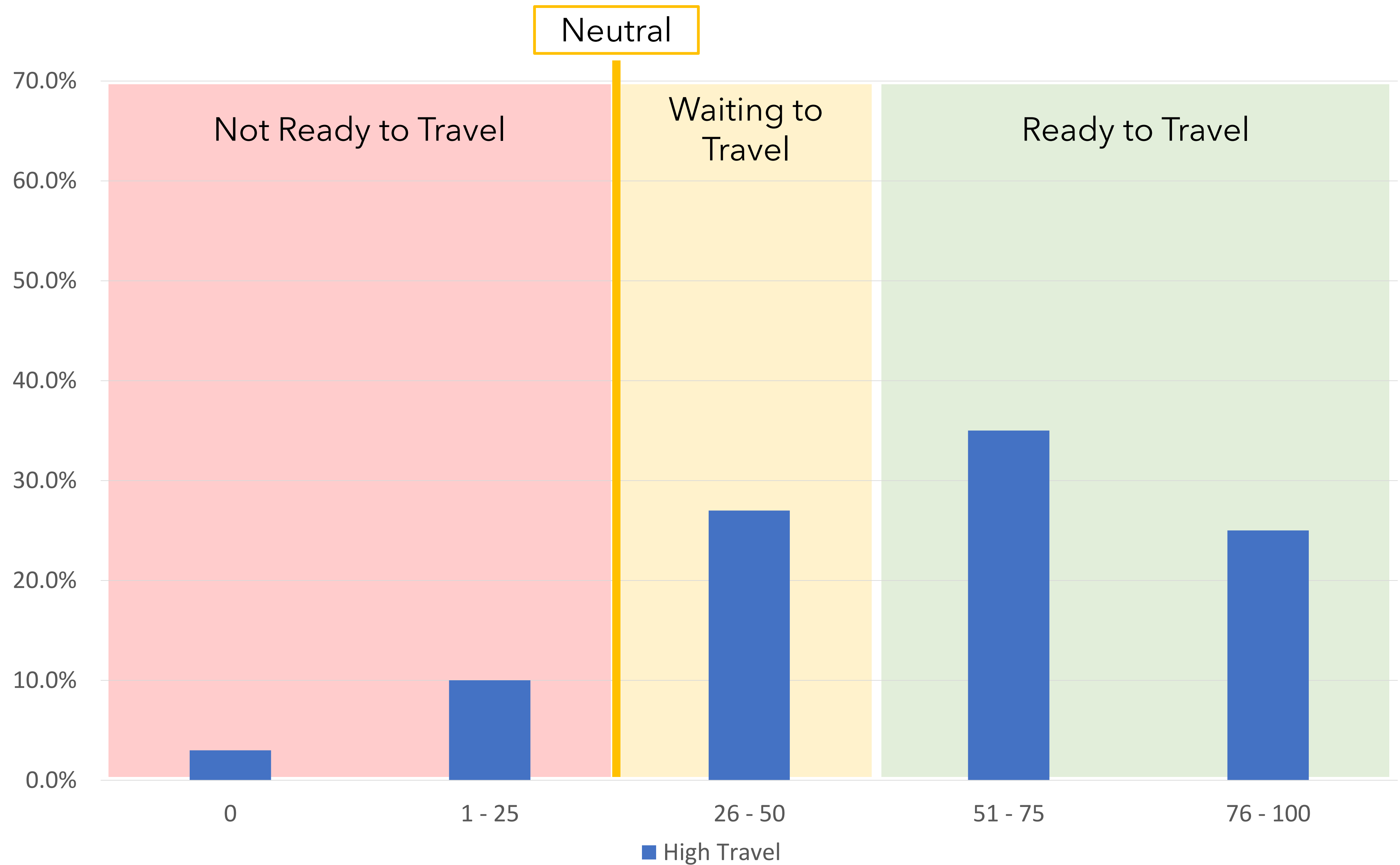
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



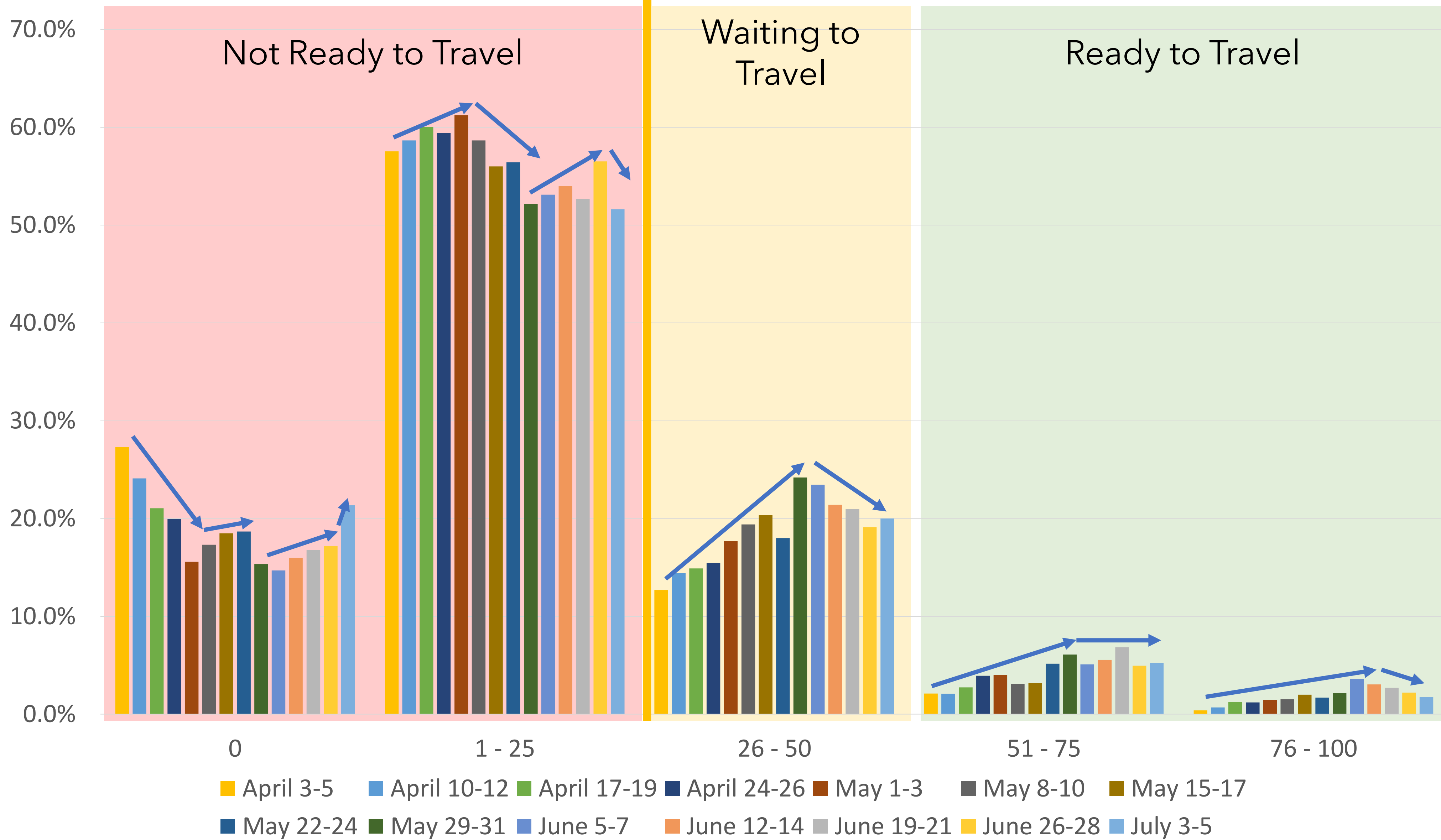
*Normalized to a 100pt scale

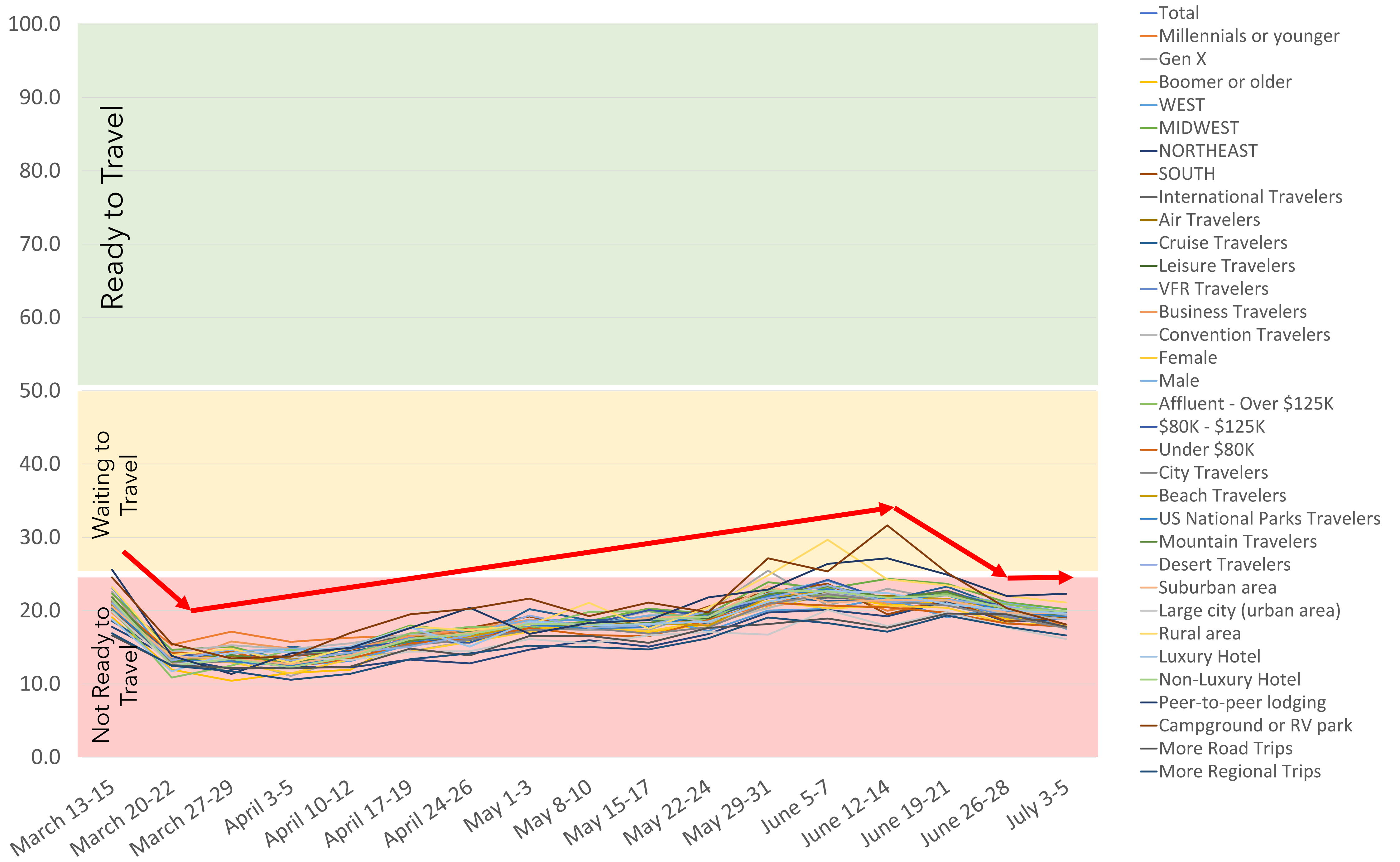
Healthy Travel Outlook



Travel Outlook

Neutral

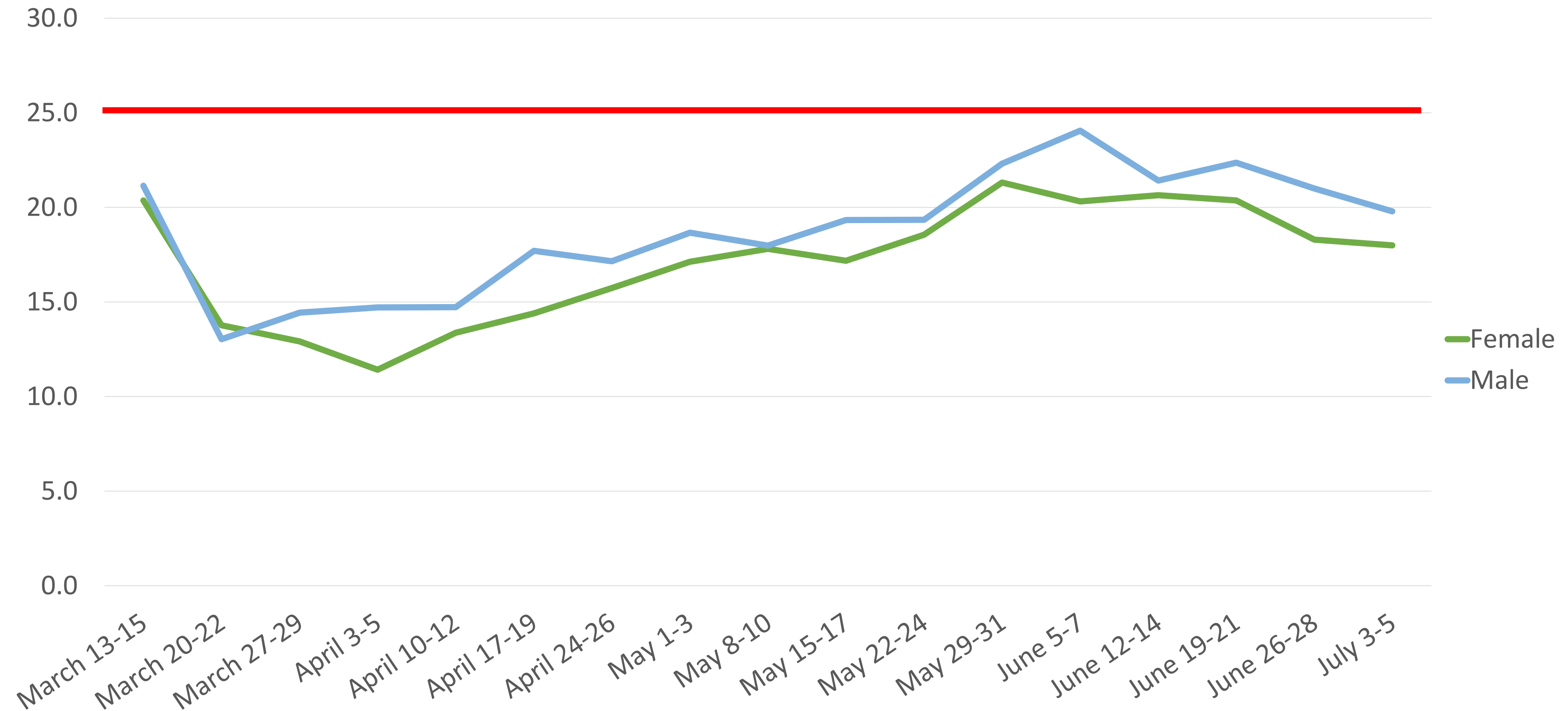




Gender

Points of Interest:

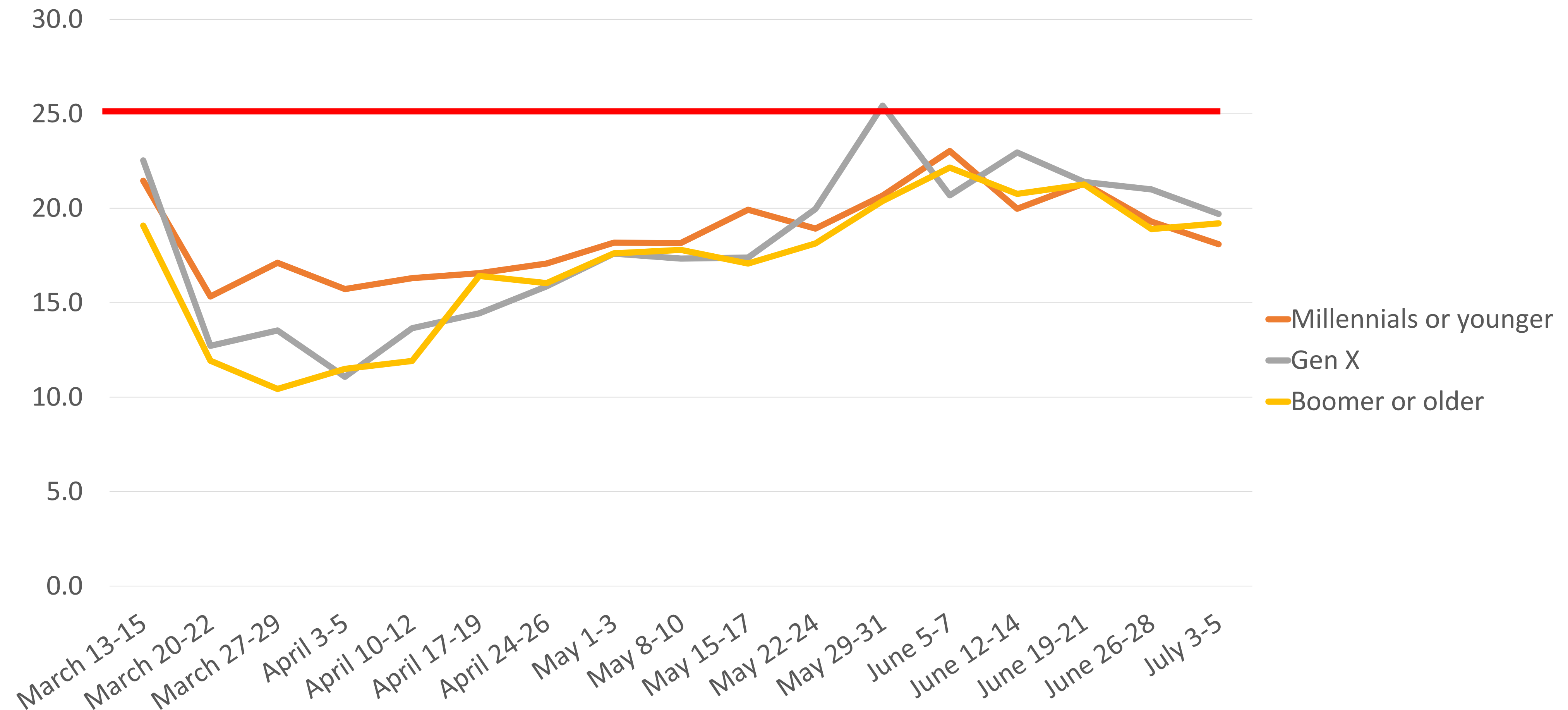
- Safety concerns increased for Men more than for Women this week.
- This week 41.2 percent of Women reported they have no plans to travel in 2020 (down from 42.3% last week).
- About a quarter of Men this week (23.4%) said they are already traveling or ready to travel with no hesitations (compared to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



Generation

Points of Interest:

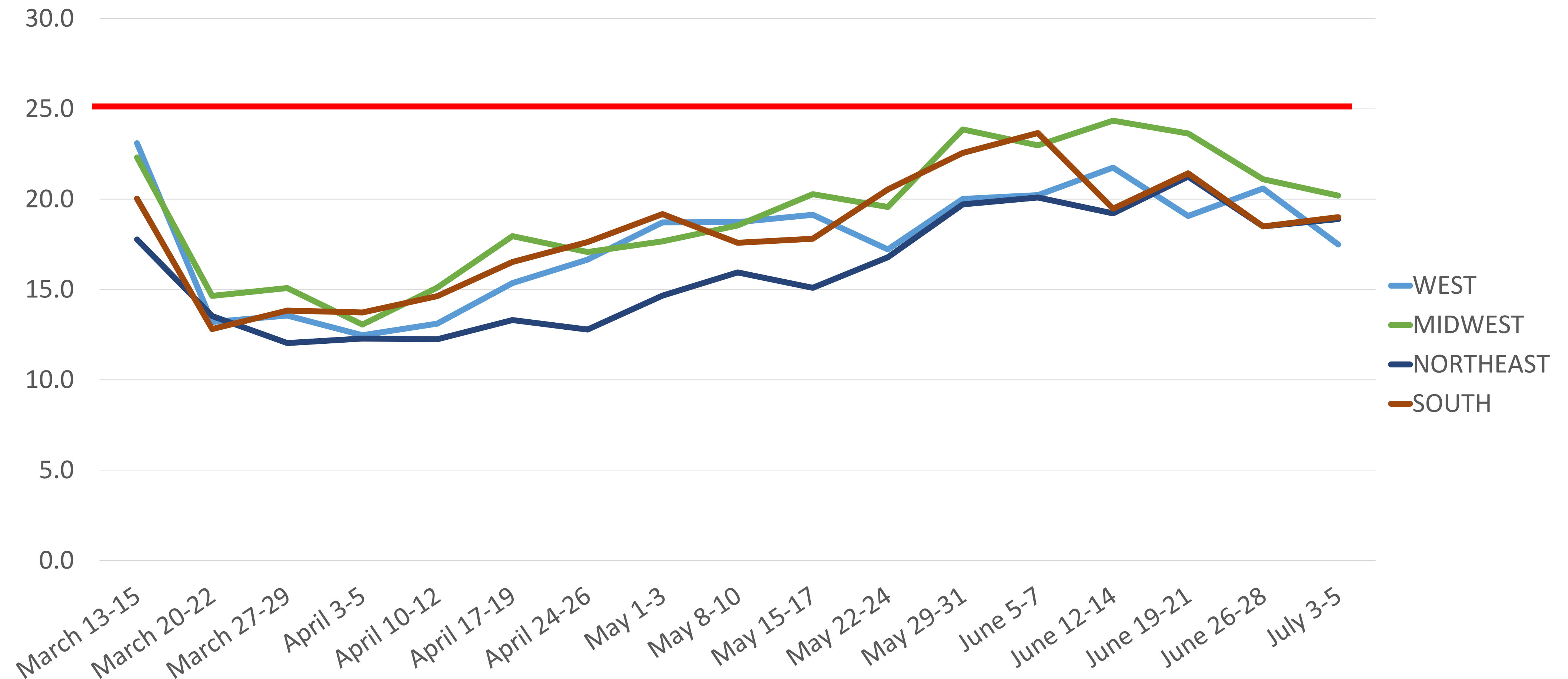
- Millennials indexed lower than the other generations this week which has only happened once before three weeks ago.
- Millennials and Gen X showed slight increases in safety concerns this week.
- About a quarter of Millennials reported having plans to travel during the Fourth of July holiday weekend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



US Region

Points of Interest:

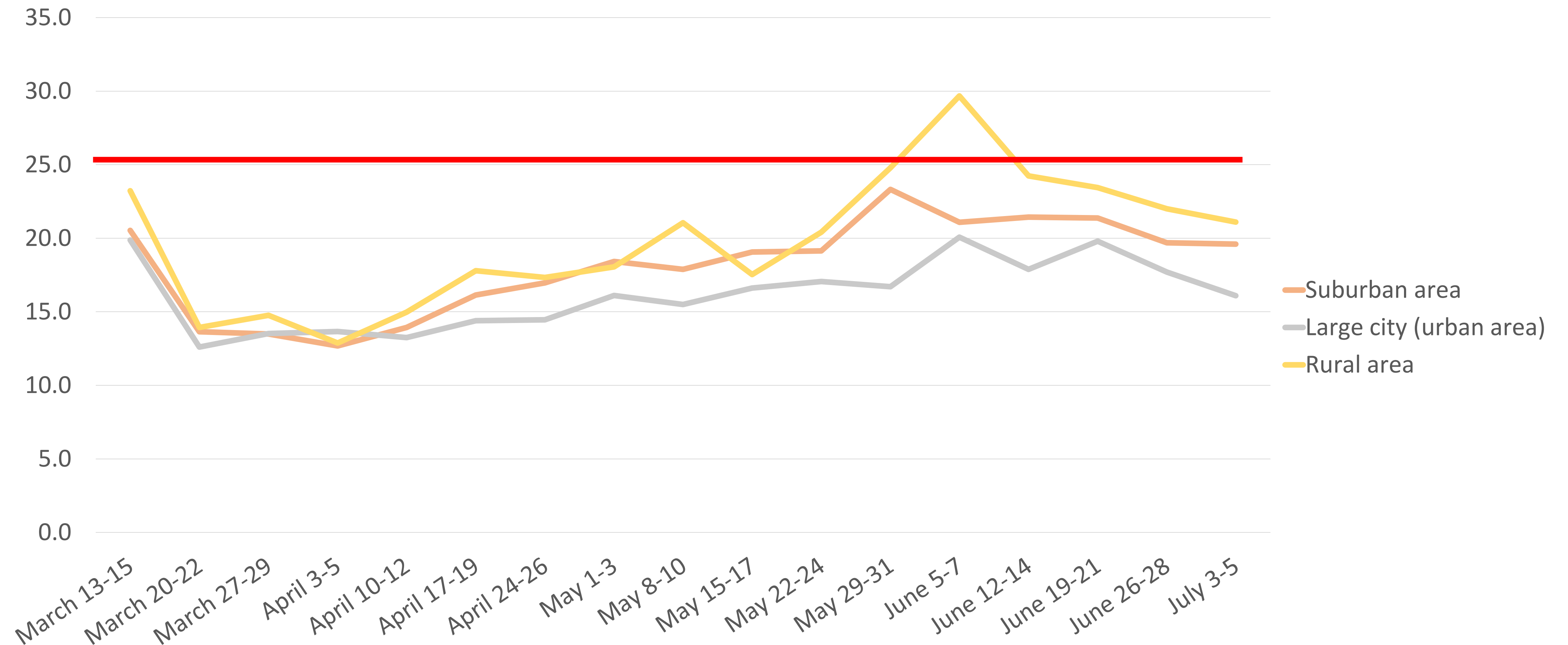
- The Midwest continued to index highest amongst US regions this week.
- The Northeast was the only region this week to report a slight decrease in safety concerns.
- The Midwest and South were the US regions that showed the most excitement for travel and openness for travel messaging.



Type Of Residence

Points of Interest Impacting Index Scores:

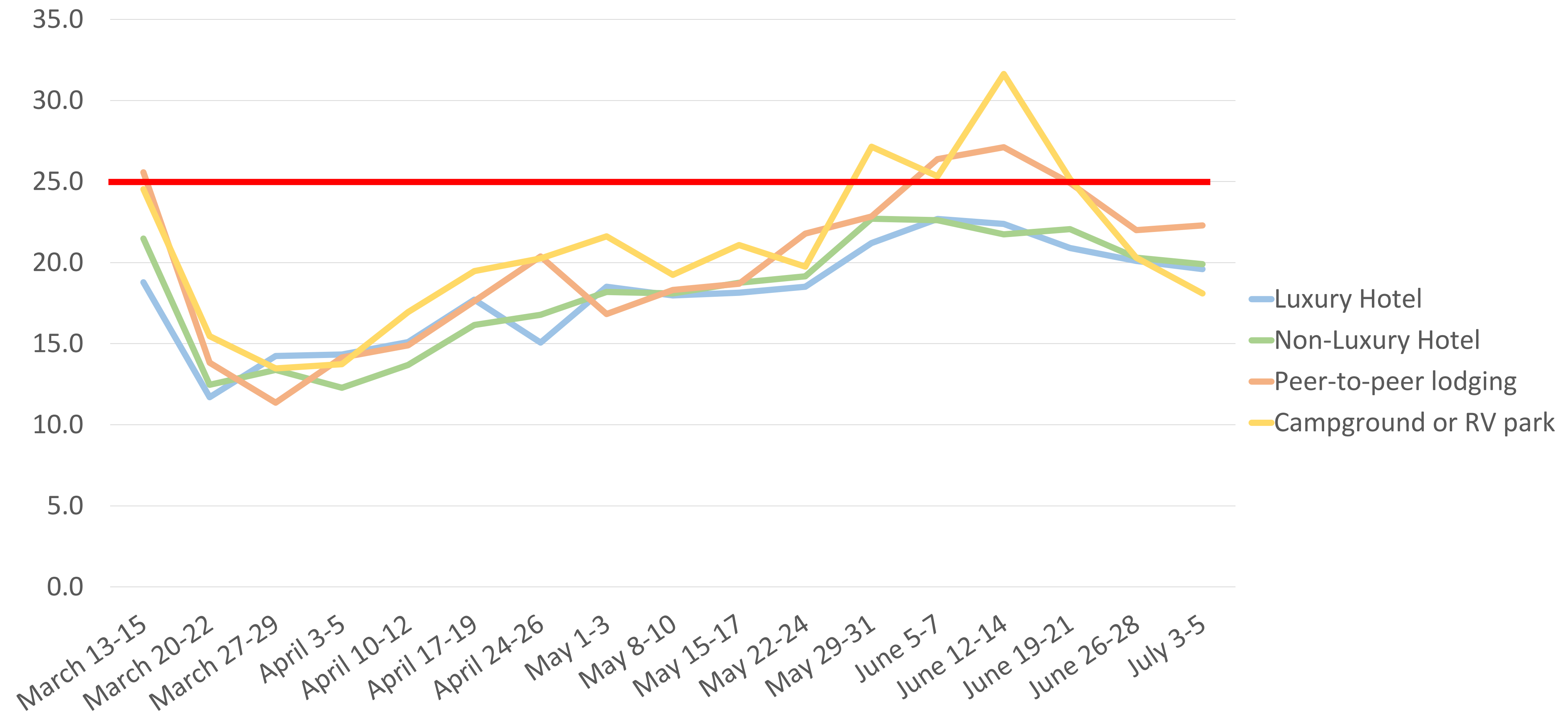
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural and Urban respondents reported the largest relative increases in safety concerns this week.
- Suburban respondents were the most likely to report currently considering visiting a specific destination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

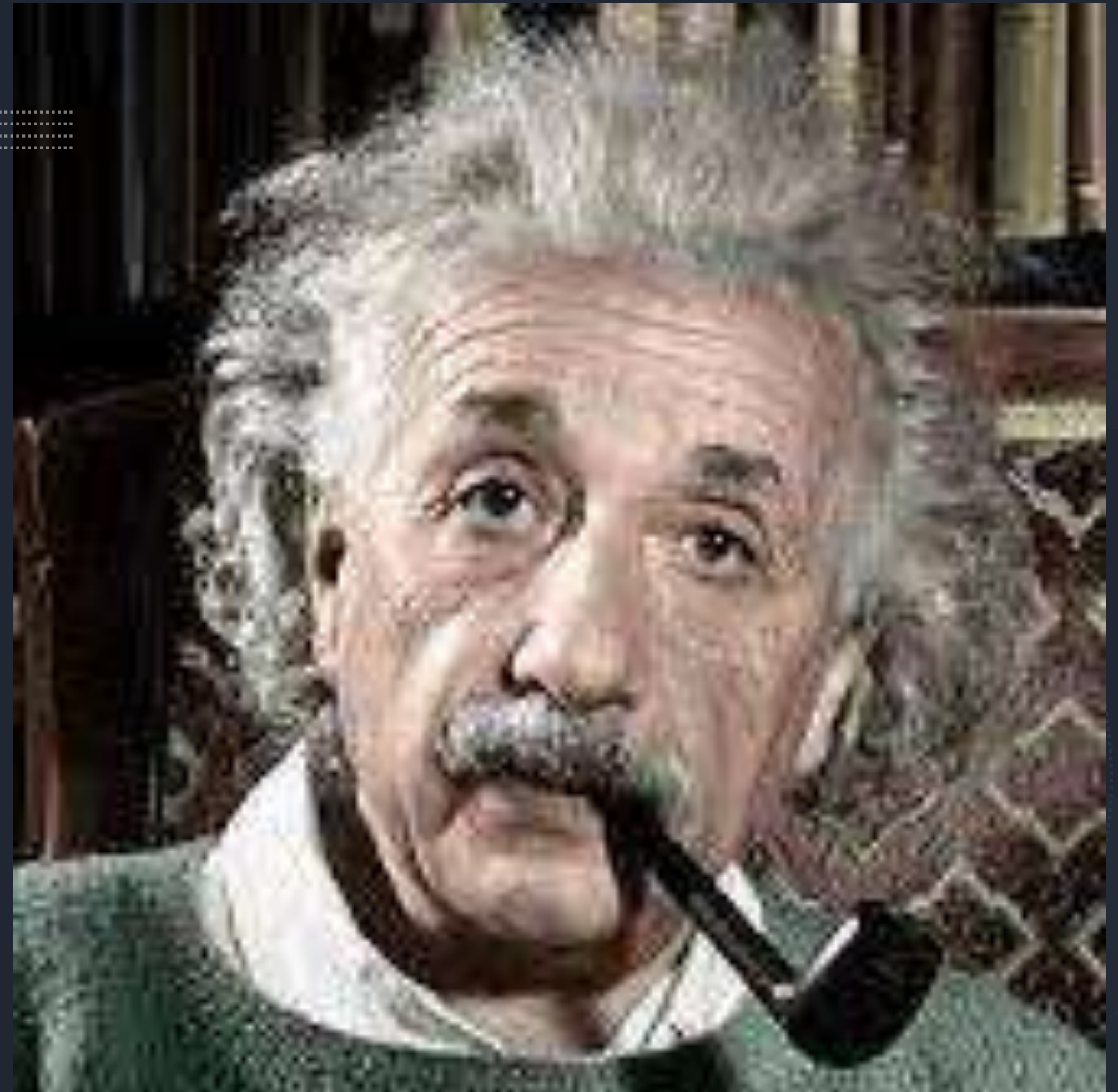


“The only source of
knowledge is experience.”

- Albert Einstein

*“Experience is what causes a
person to make new mistakes
instead of old ones.”*

- Somebody



Next/Ongoing Updates

- Key Findings to Know released via email every Monday morning
- Complete Report of Findings sent (and dashboard updated) by each Tuesday morning
- Online Presentation of Findings every Tuesday at 8:00am PST/11:00am EST
- Shareable infographics and gifs on social media



**Do you have a survey topic you
want us to explore?**

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**

15-minute presentations for your board and stakeholders

info@destinationanalysts.com



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