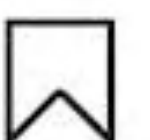

When the school year is over and
you survived 12 weeks of
homeschooling



When he finds out all you needed
was food to get rid of that attitude





Coronavirus Travel Sentiment Index

Presentation of Findings
Week of June 7th

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.

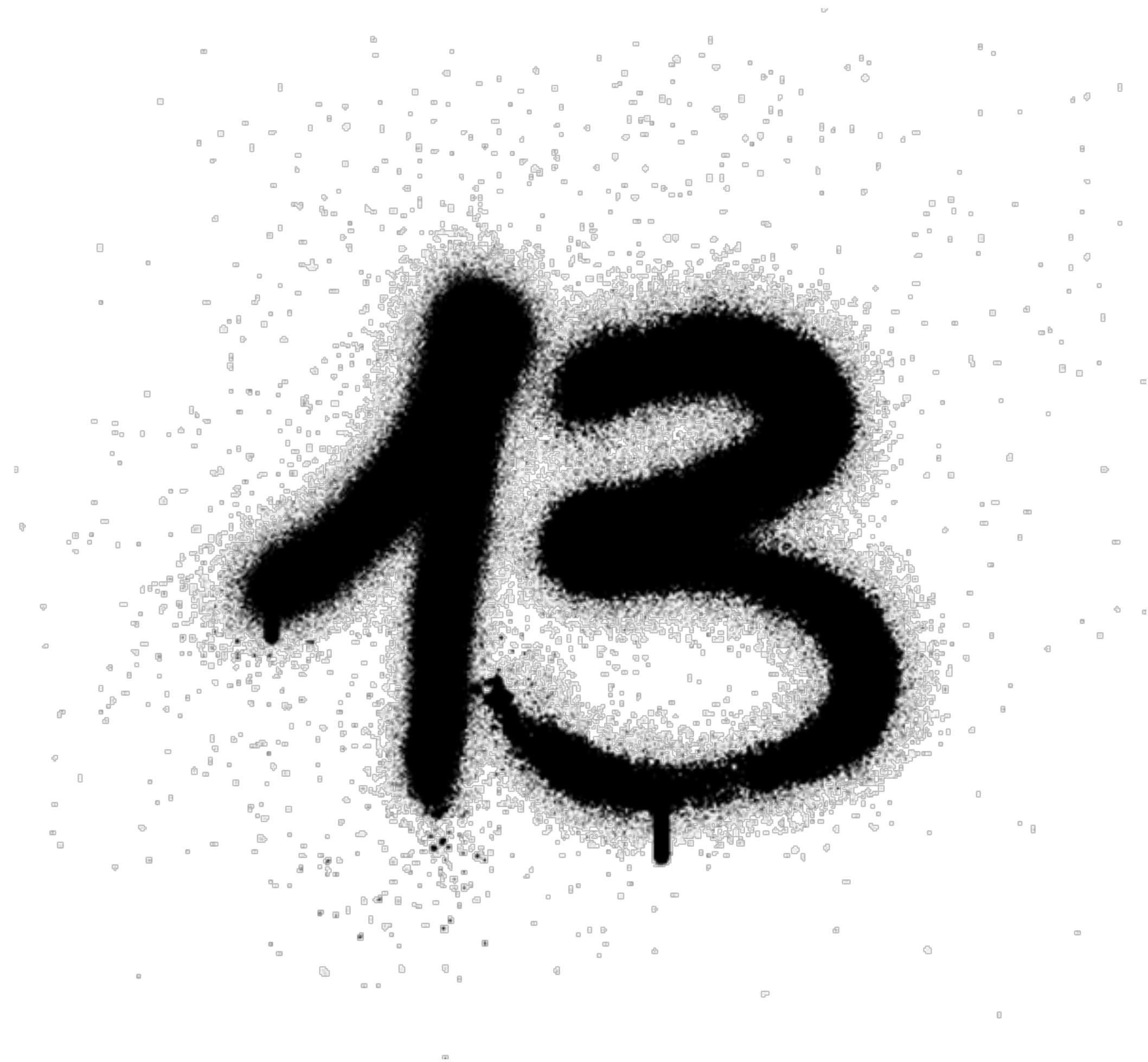
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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 13 data (fielded June 5th-7th) 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.



TODAY

Overview of
This Week's Findings

Travel Marketing
Potential Influence Index

North Carolina/The Outer Banks



problematic statistical

report method

Survey result

select

analysis

question

examine

Cases in the U.S.

Other Languages ▾ Print Page

Last updated on June 6, 2020





The Atlantic

AA



SCIENCE

America Is Giving Up on the Pandemic

Businesses are reopening. Protests are erupting nationwide. But the virus isn't done with us.

ALEXIS C. MADRIGAL AND ROBINSON MEYER JUN 7, 2020



(MEL D. COLE / GETTY / THE ATLANTIC)

After months of deserted public spaces and empty roads, Americans have returned to the streets. But they have come not for a joyous reopening to celebrate the country's victory



CNN

AA



CNN travel

Summer vacation: What are the risks?

Marnie Hunter, CNN

Updated 8:21 AM EDT June 4, 2020

In this new normal where everything is a calculation, summer vacation presents a whole host of questions.



nytimes
New York, New York



New York City Begins To Reopen, 100 Days After Its First Case

As many as 400,000 workers can begin returning to their jobs on Monday.

June 8, 2020



21,058 likes

nytimes New York City, which weathered extensive hardship as a center of the worldwide coronavirus... more

View all 199 comments

A photograph of travel gear on a beach. In the foreground, a brown leather suitcase sits on a wooden surface. A woven straw hat with a dark band is placed on top of the suitcase. A silver and black vintage camera with a black strap is positioned in front of the suitcase. The background is a blurred view of a beach, ocean, and a clear blue sky. A palm tree frond is visible in the upper right corner.

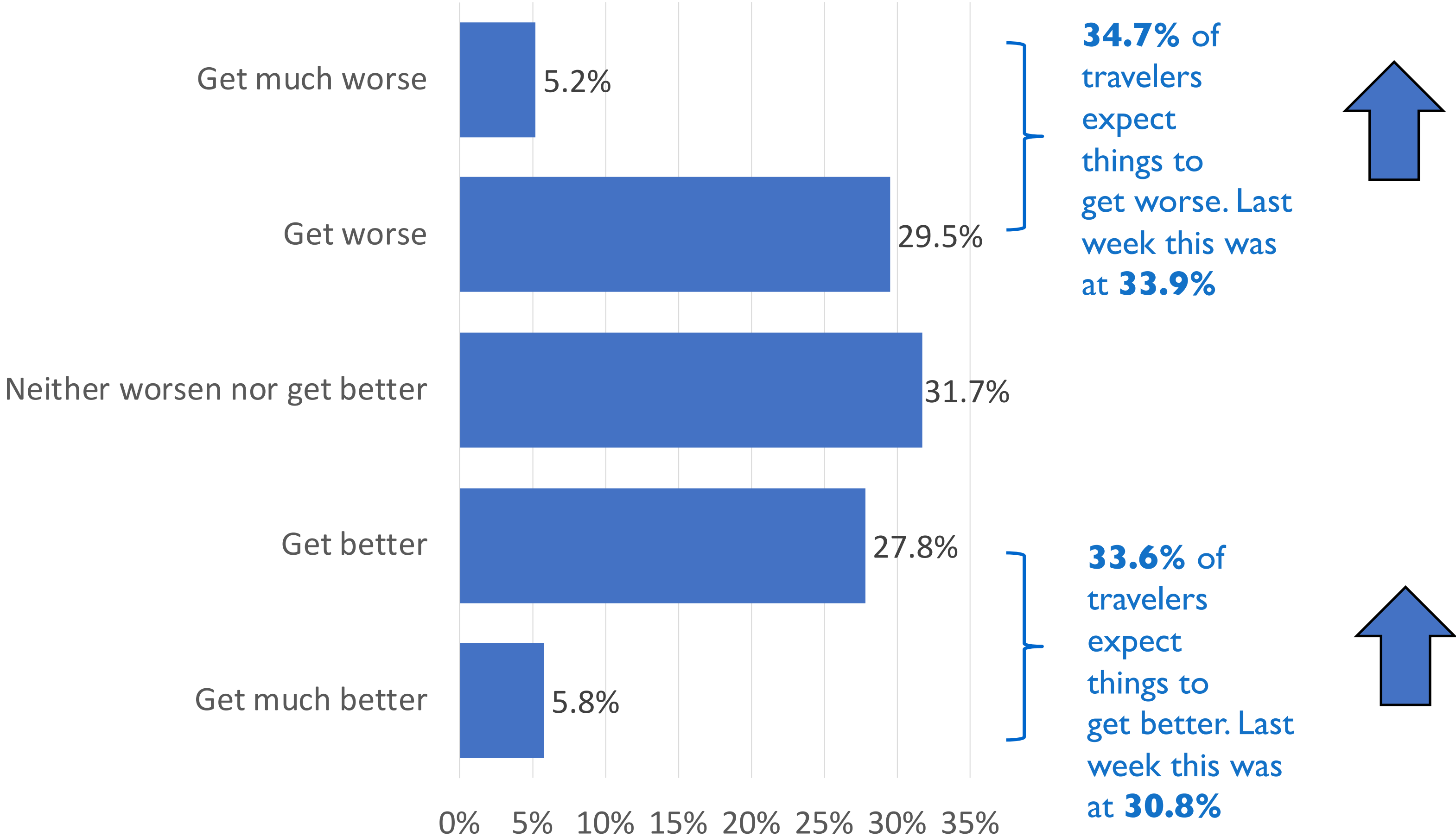
How Safe Americans Feel about Travel

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 _____

(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)

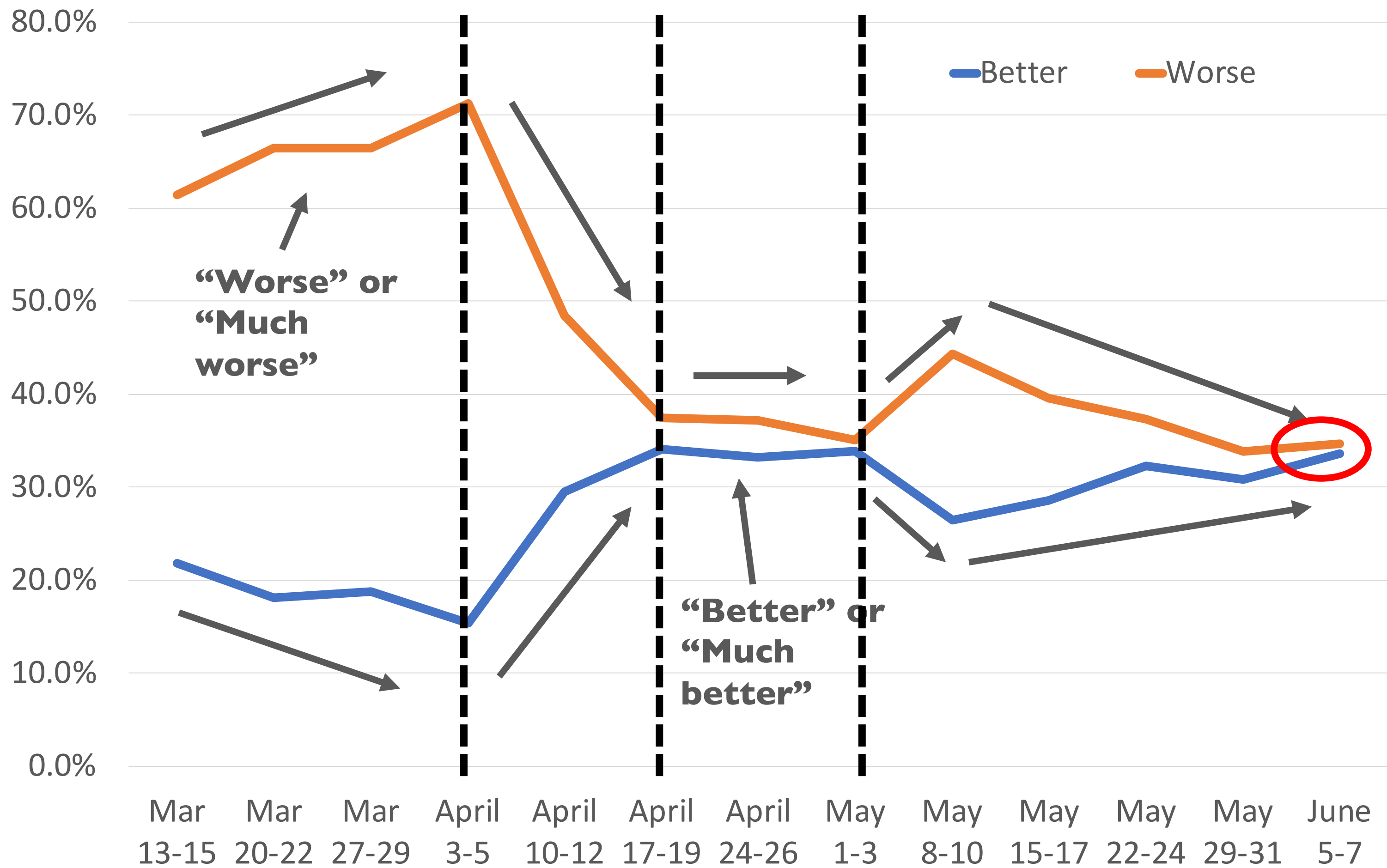


Expectations for the Coronavirus Outbreak

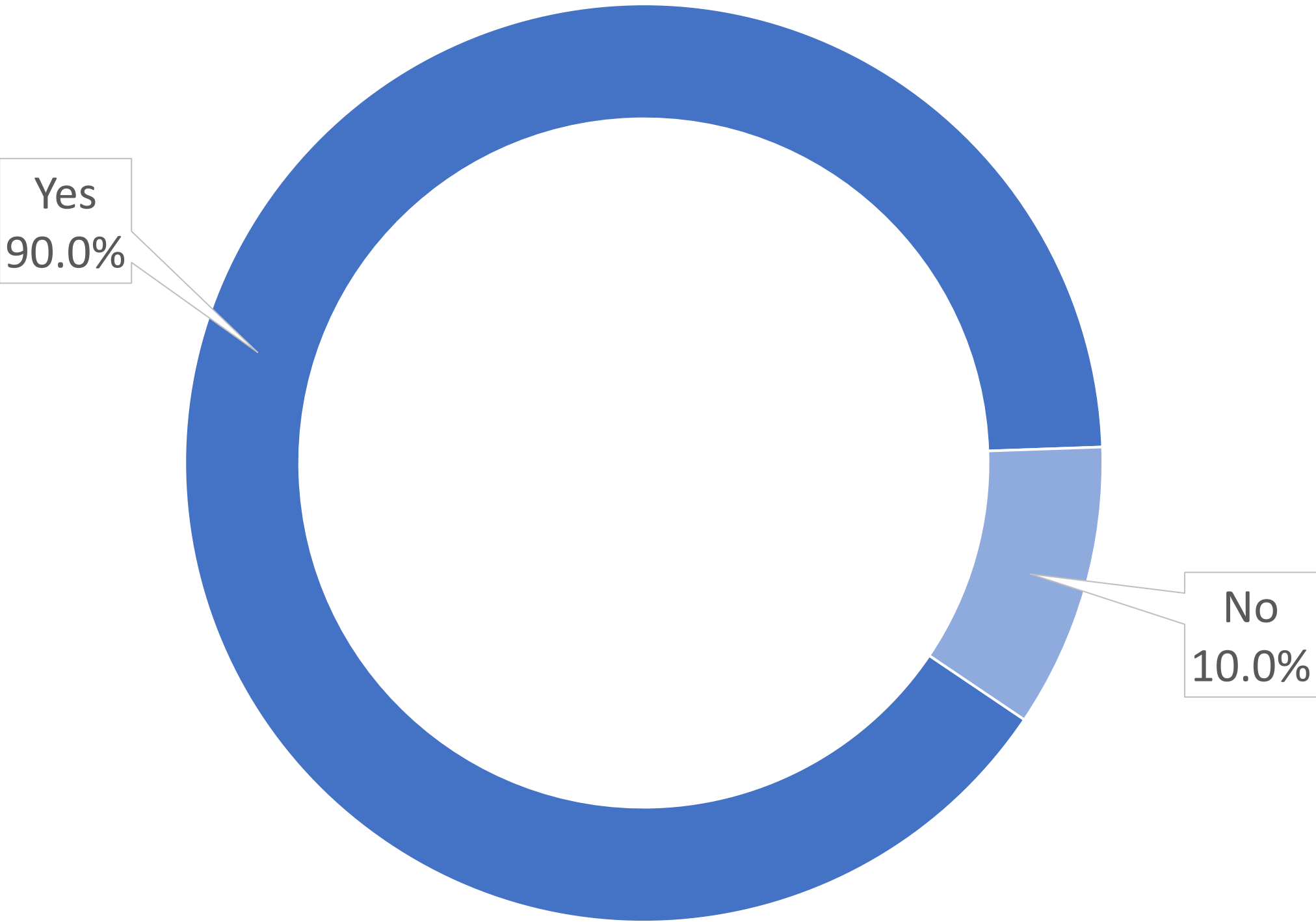
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will

(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 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 and June 5-7, 2020)



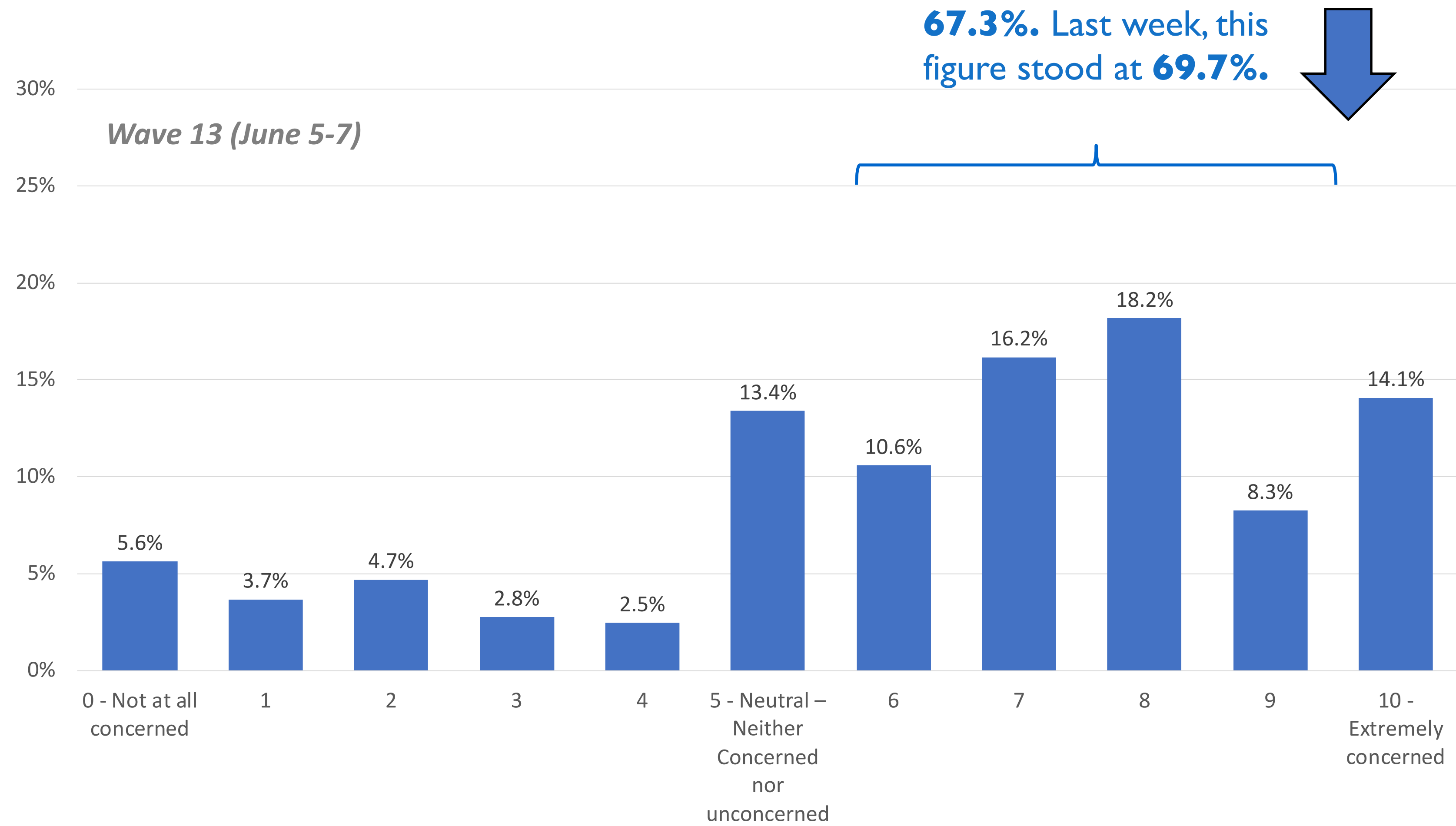
Question: Has the social unrest (protests, etc.) happening in the country right now contributed to your expectation that the Coronavirus situation will get worse in the next month?



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)

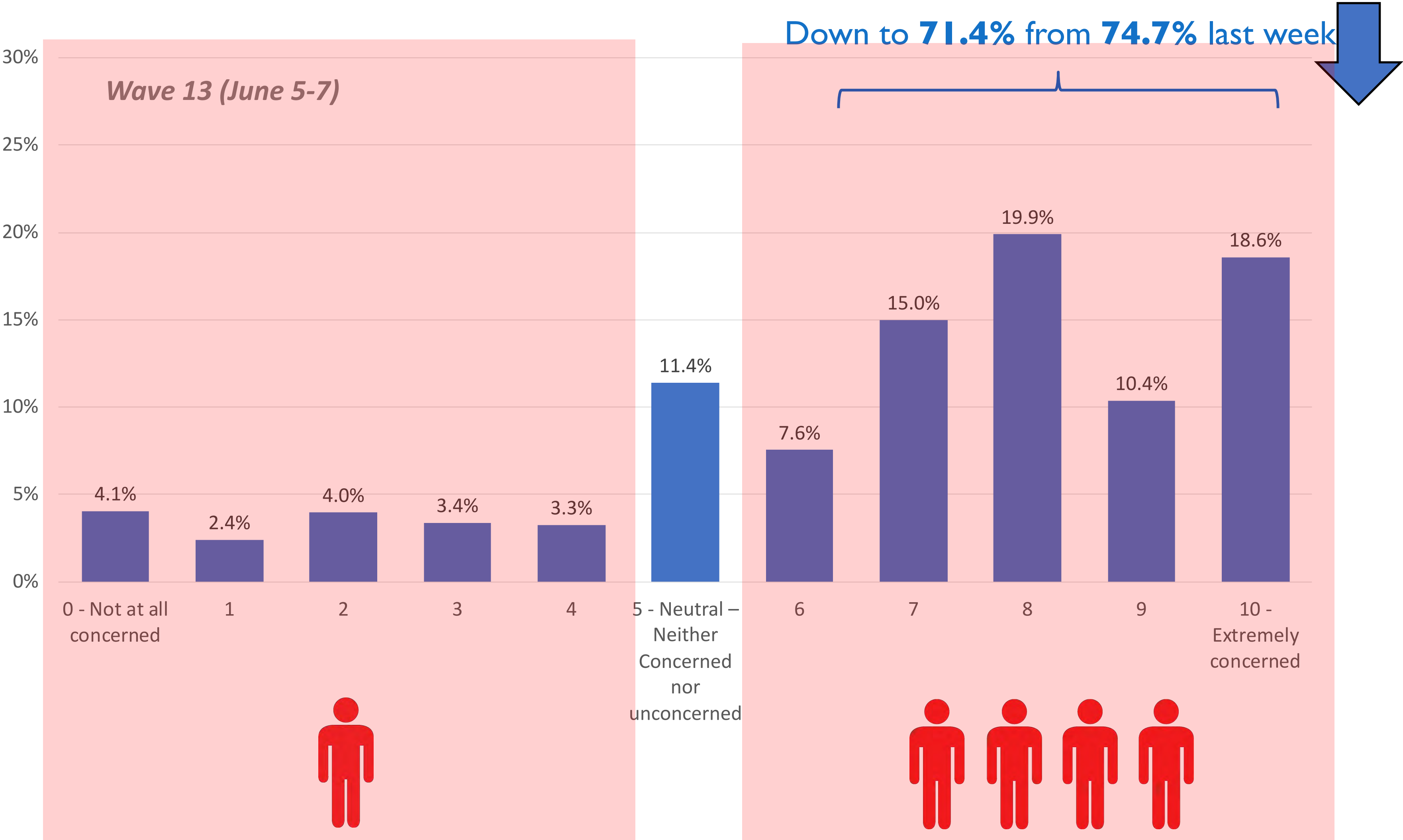
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



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)

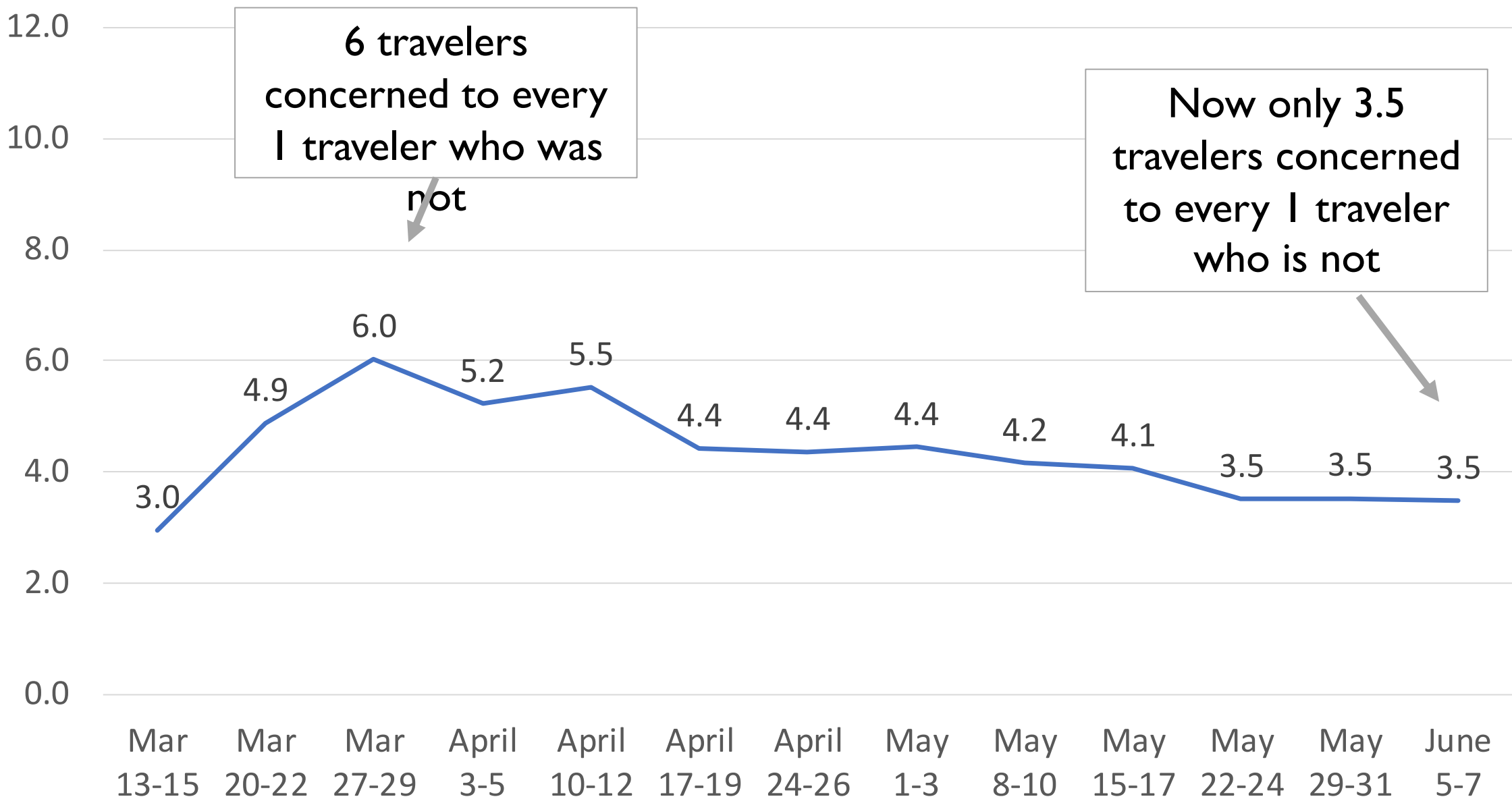
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Ratio of Concerned to Unconcerned Travelers: Safety

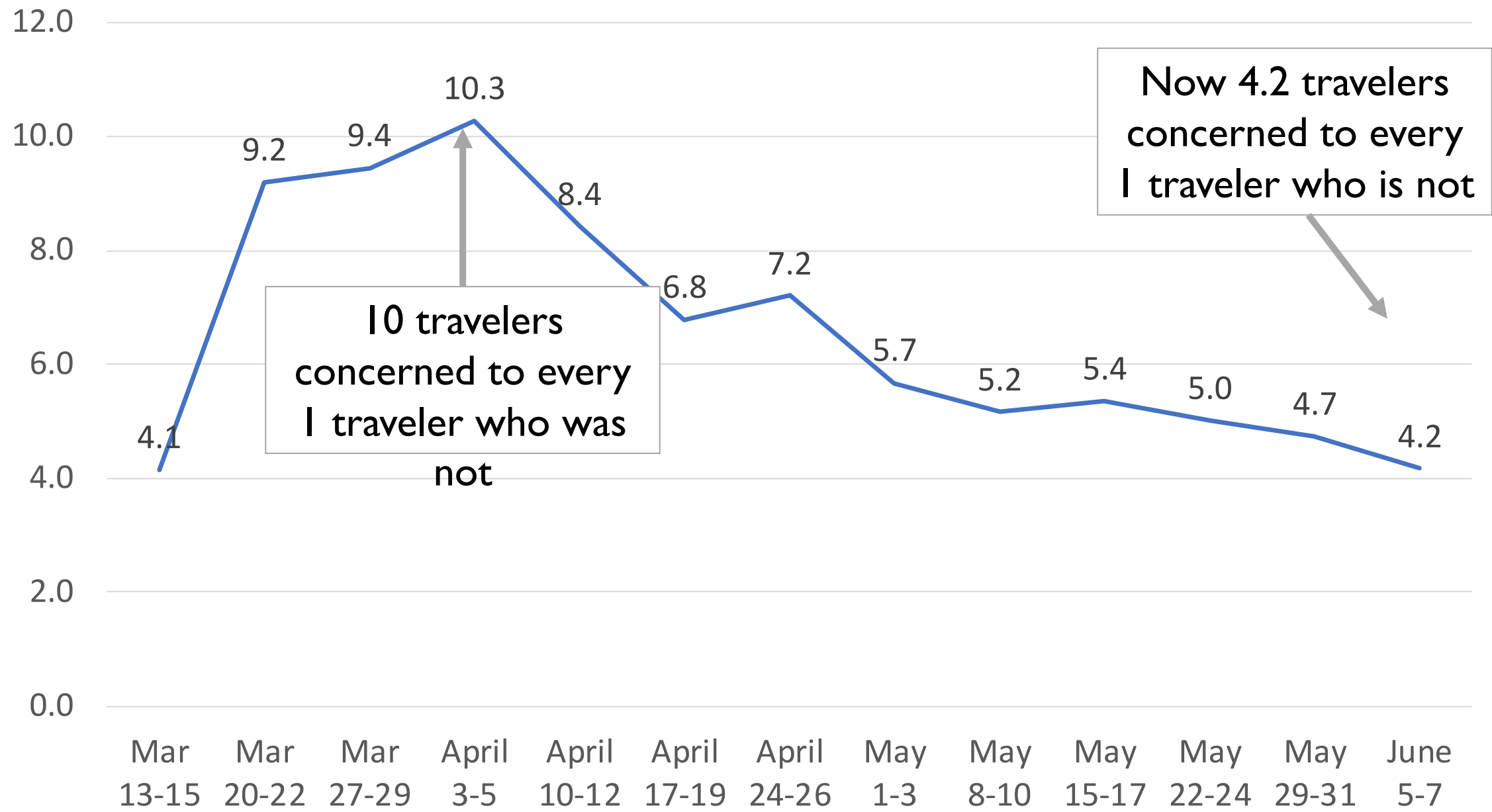
Personal Safety

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



Safety of Friends and Relatives

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



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

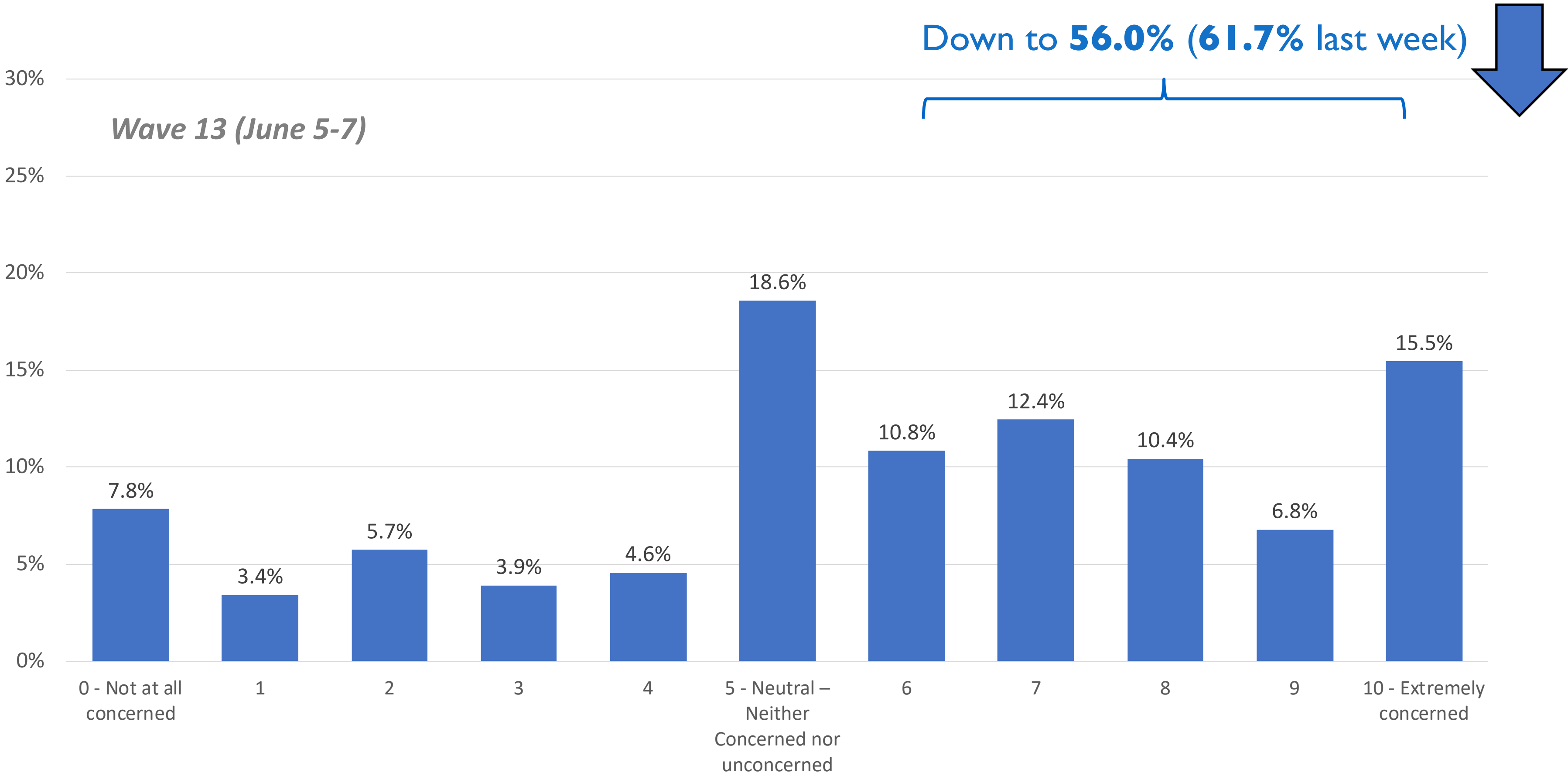
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: 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 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 and June 5-7, 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)

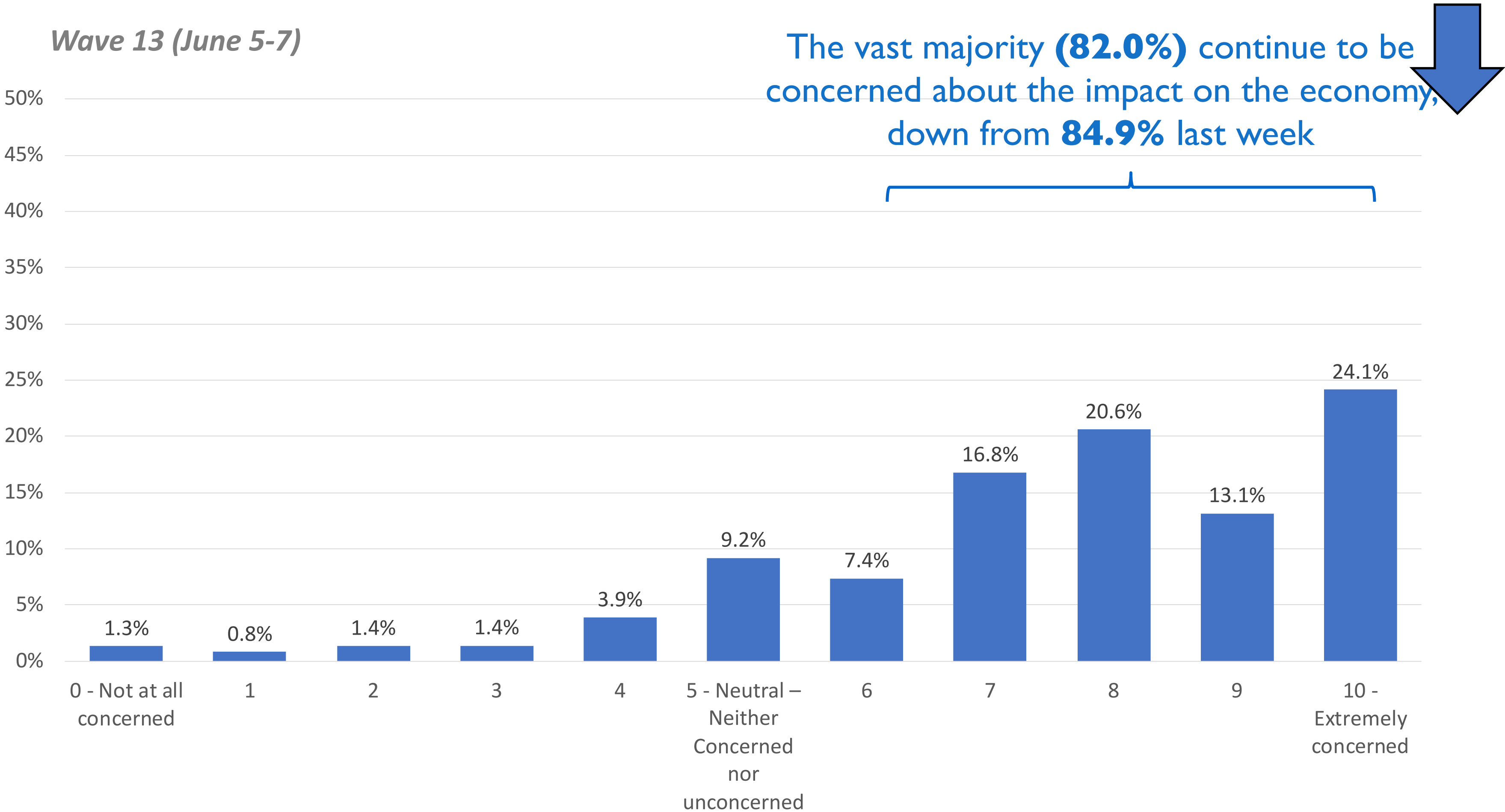
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



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?

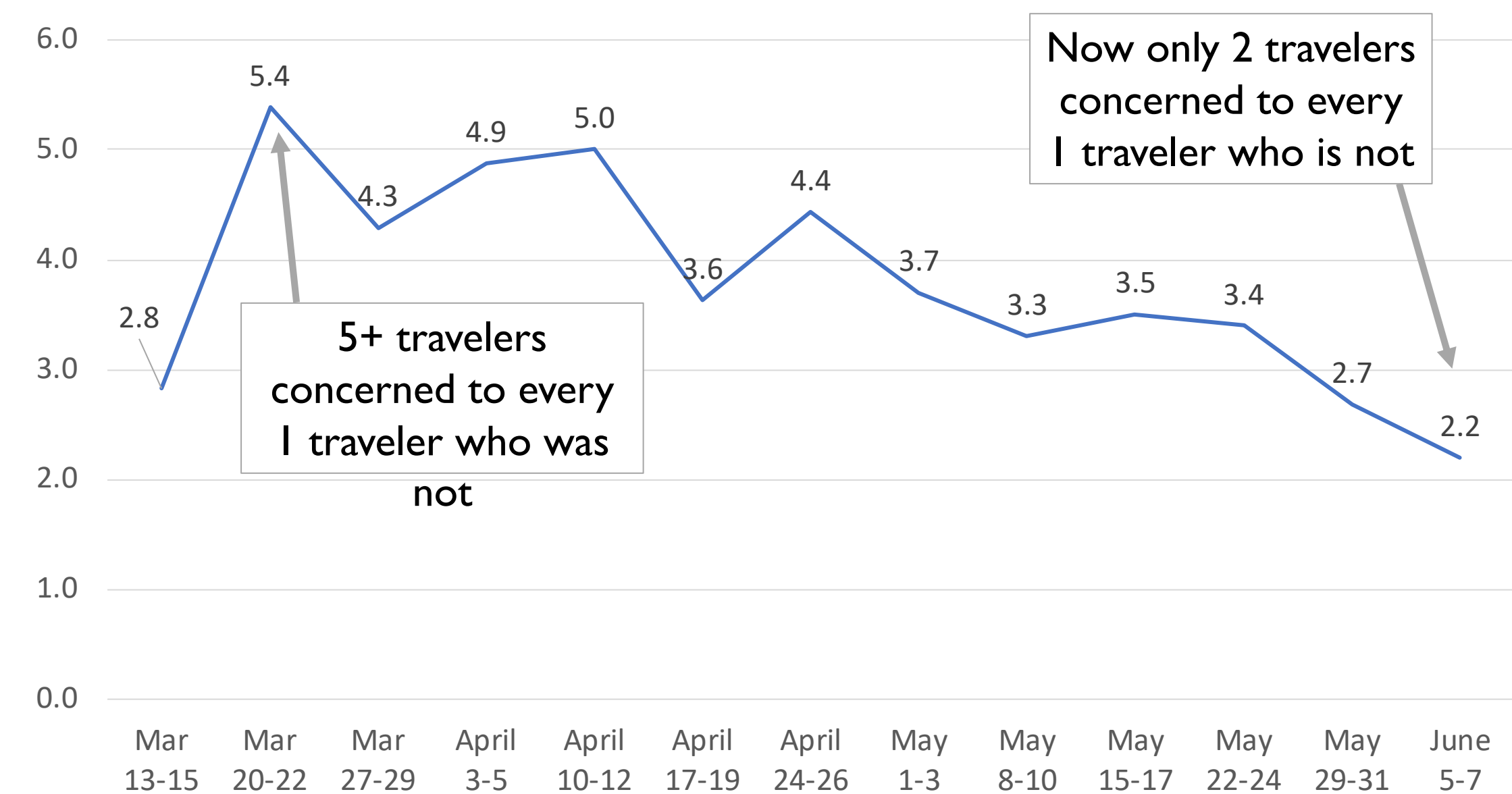
(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Personal Finances

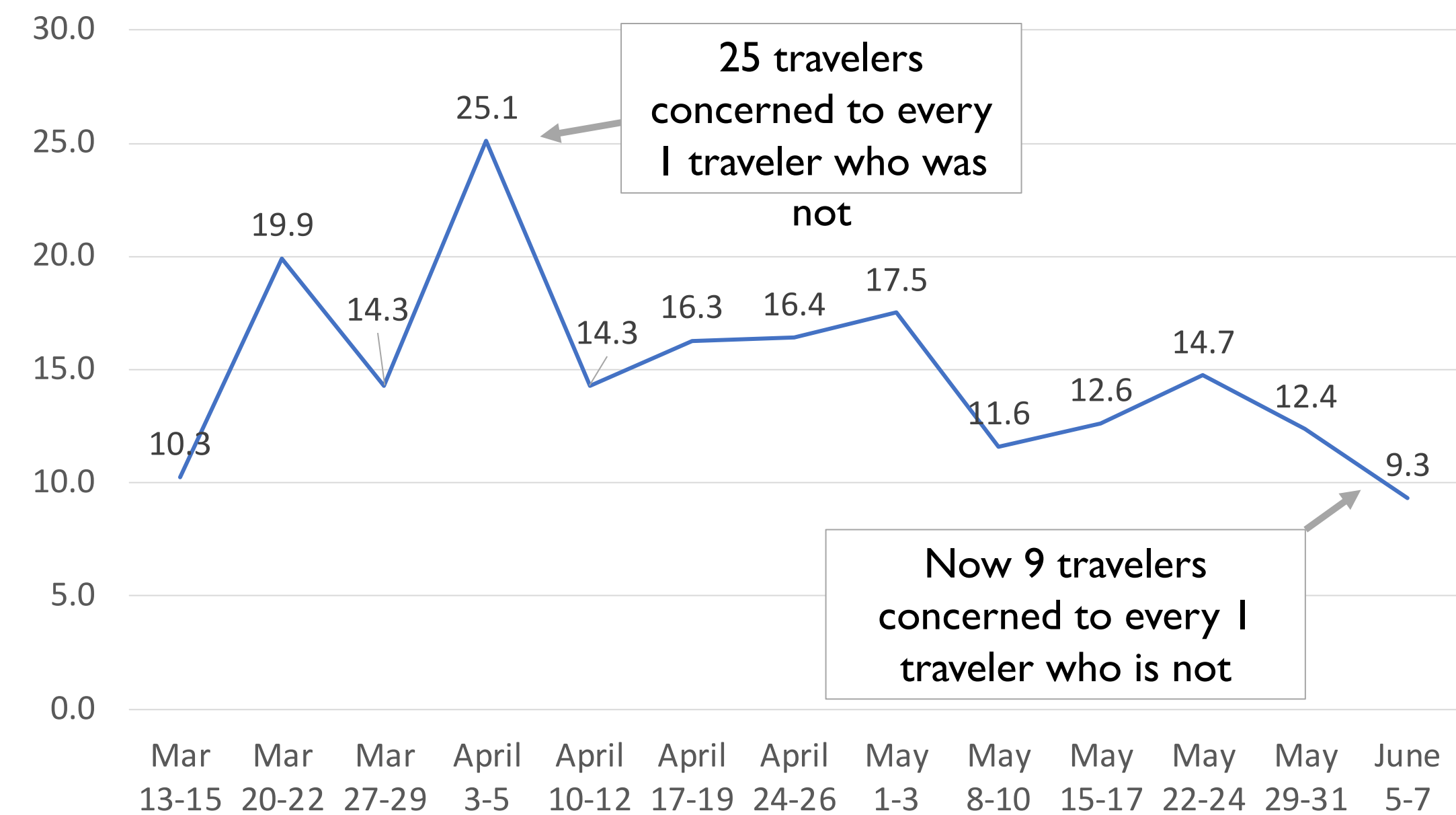
Ratio of concerned (10-6) to unconcerned (0-4) on 11-point scale)



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 11-point scale)

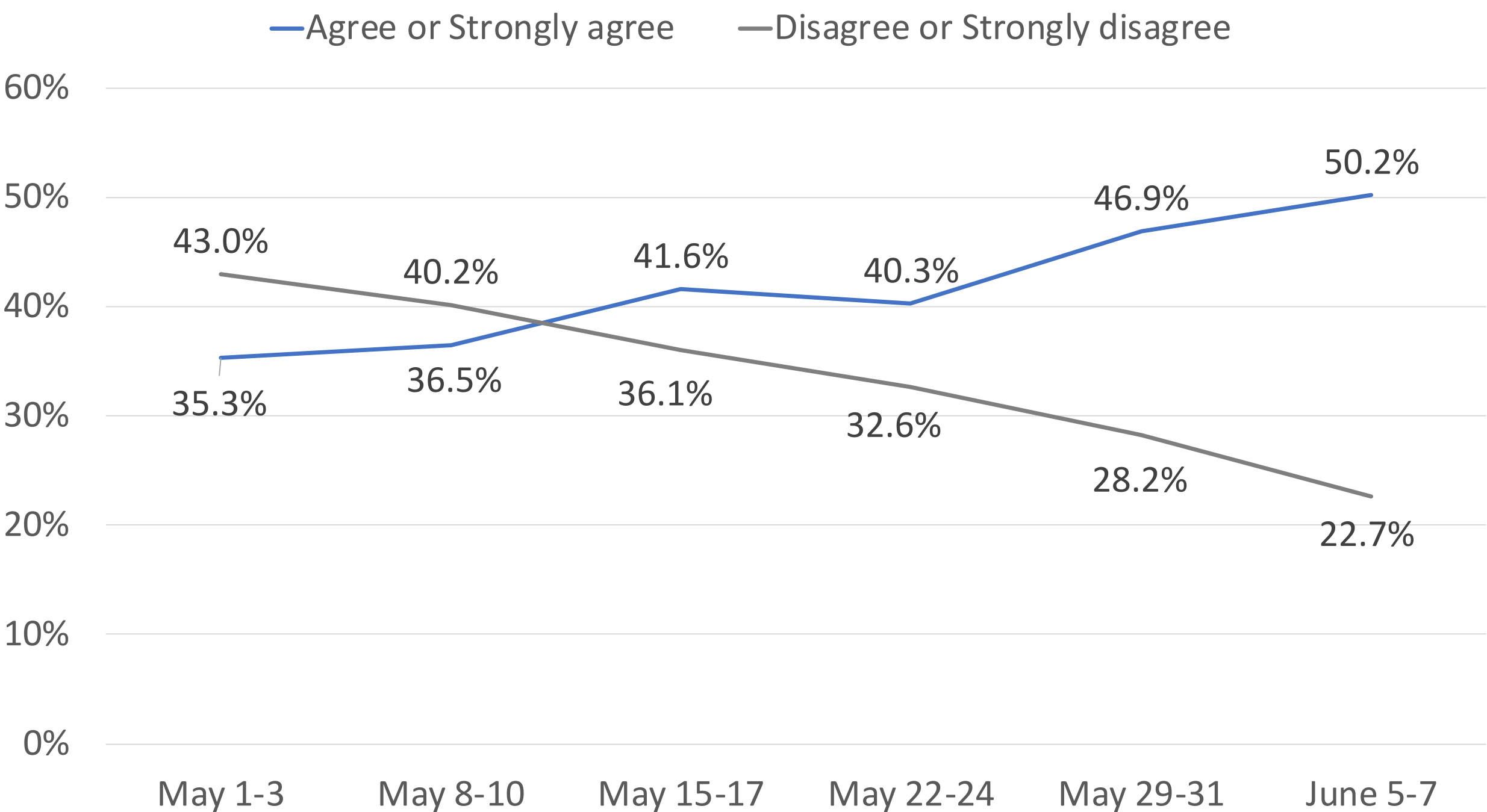
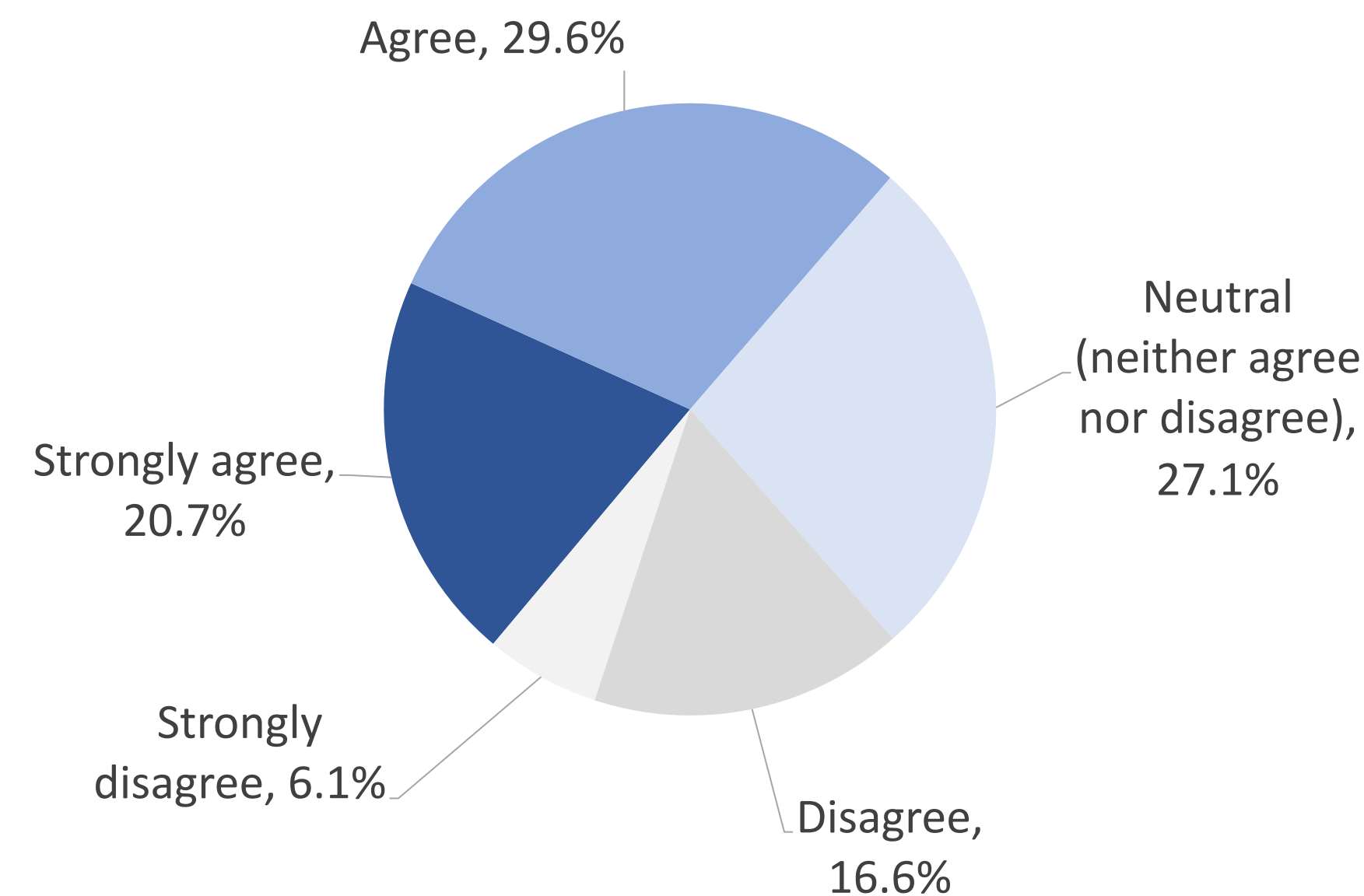


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

Comfort with Home State Re-Opening

How much do you agree with the following statement?

Statement: I am comfortable with my home state re-opening its economy right now.

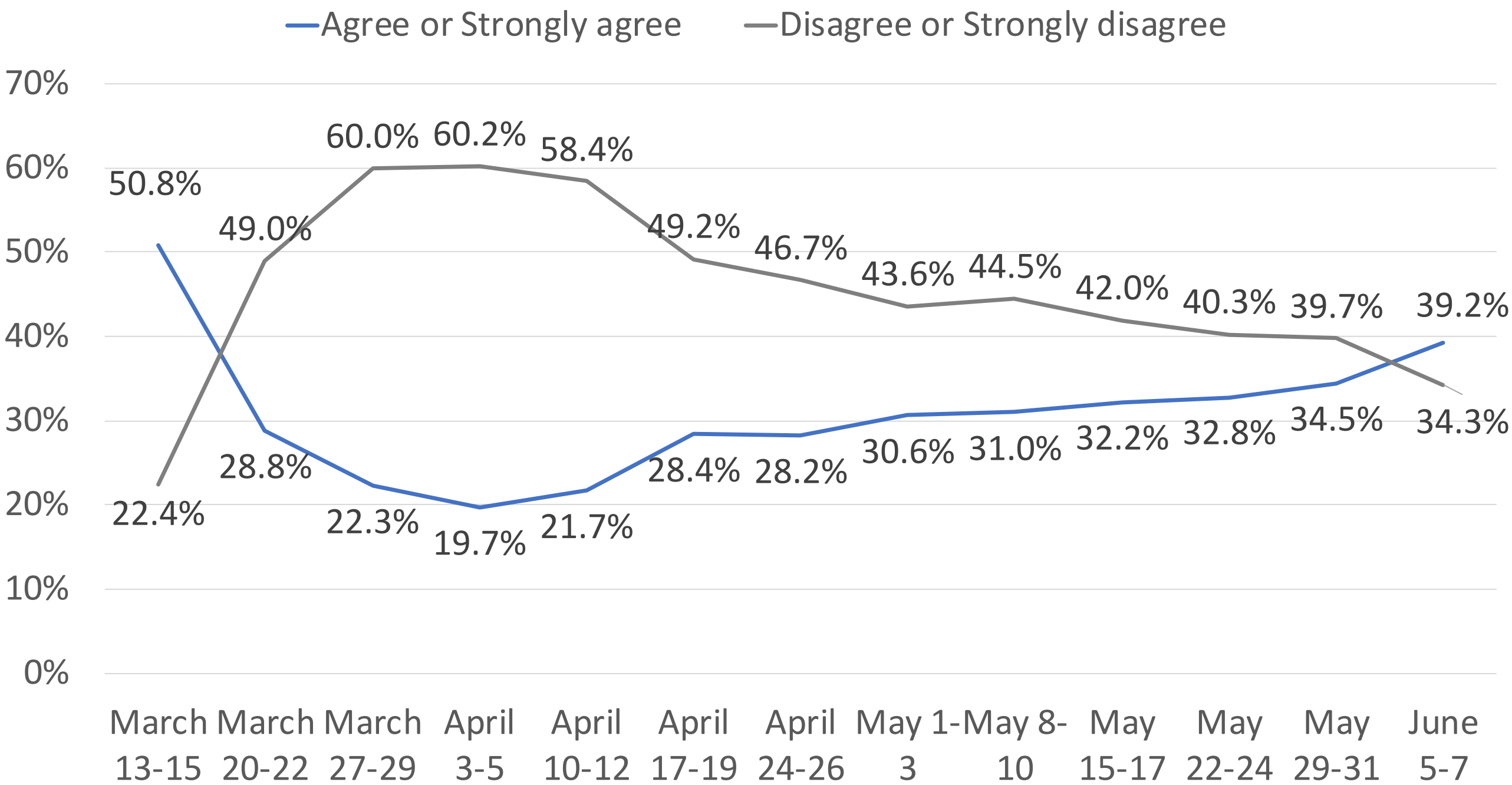
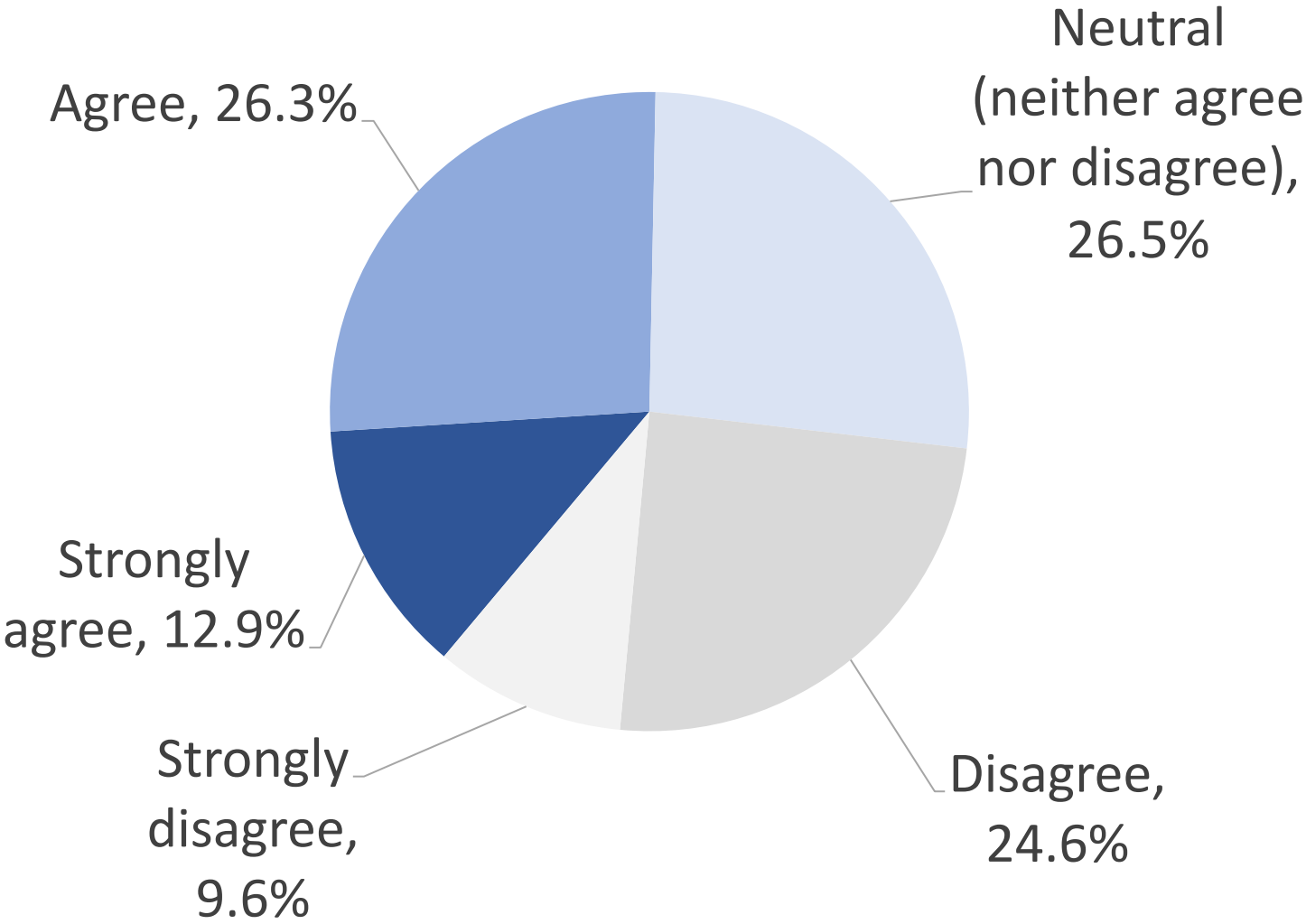


(Base: All respondents, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

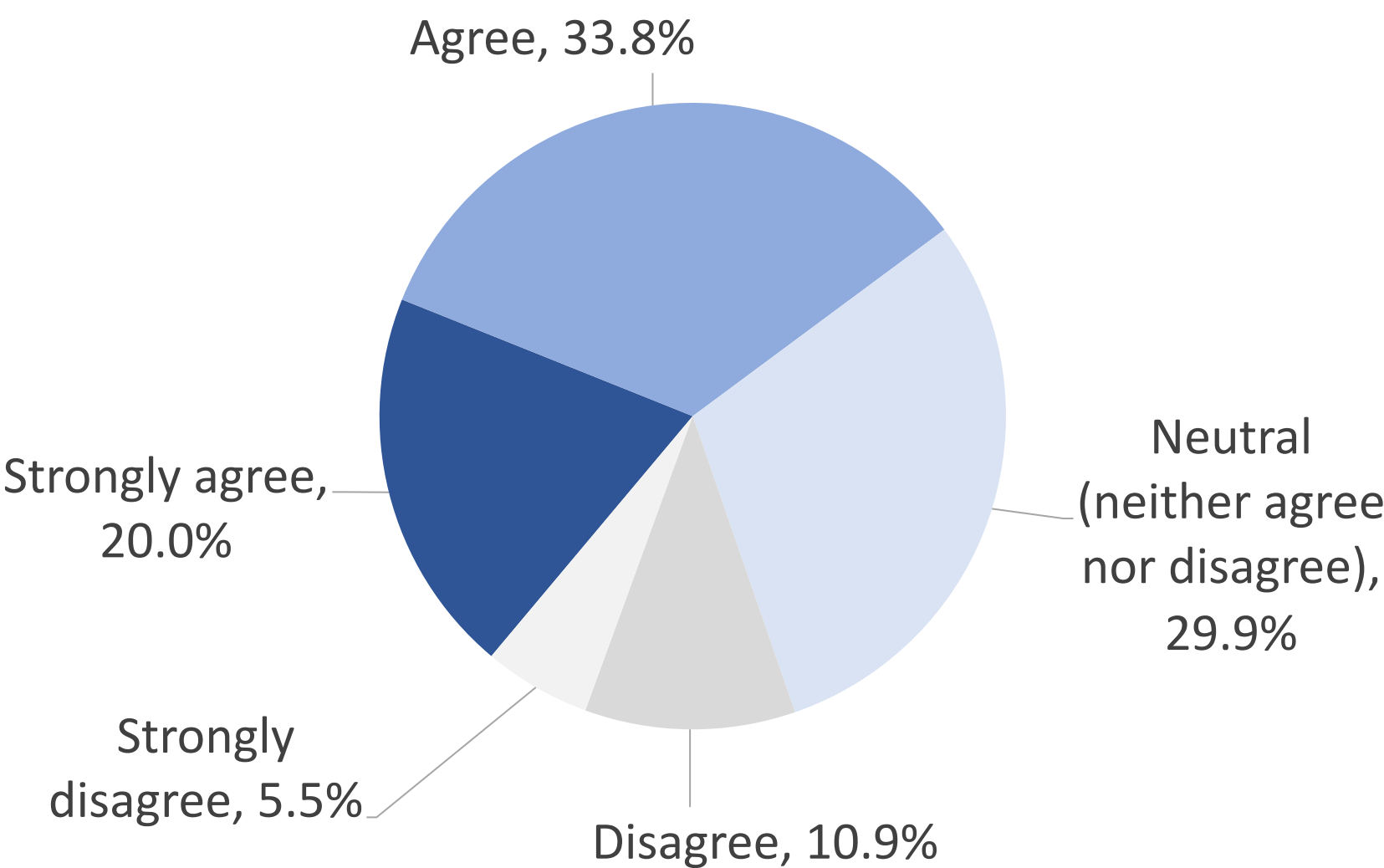


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

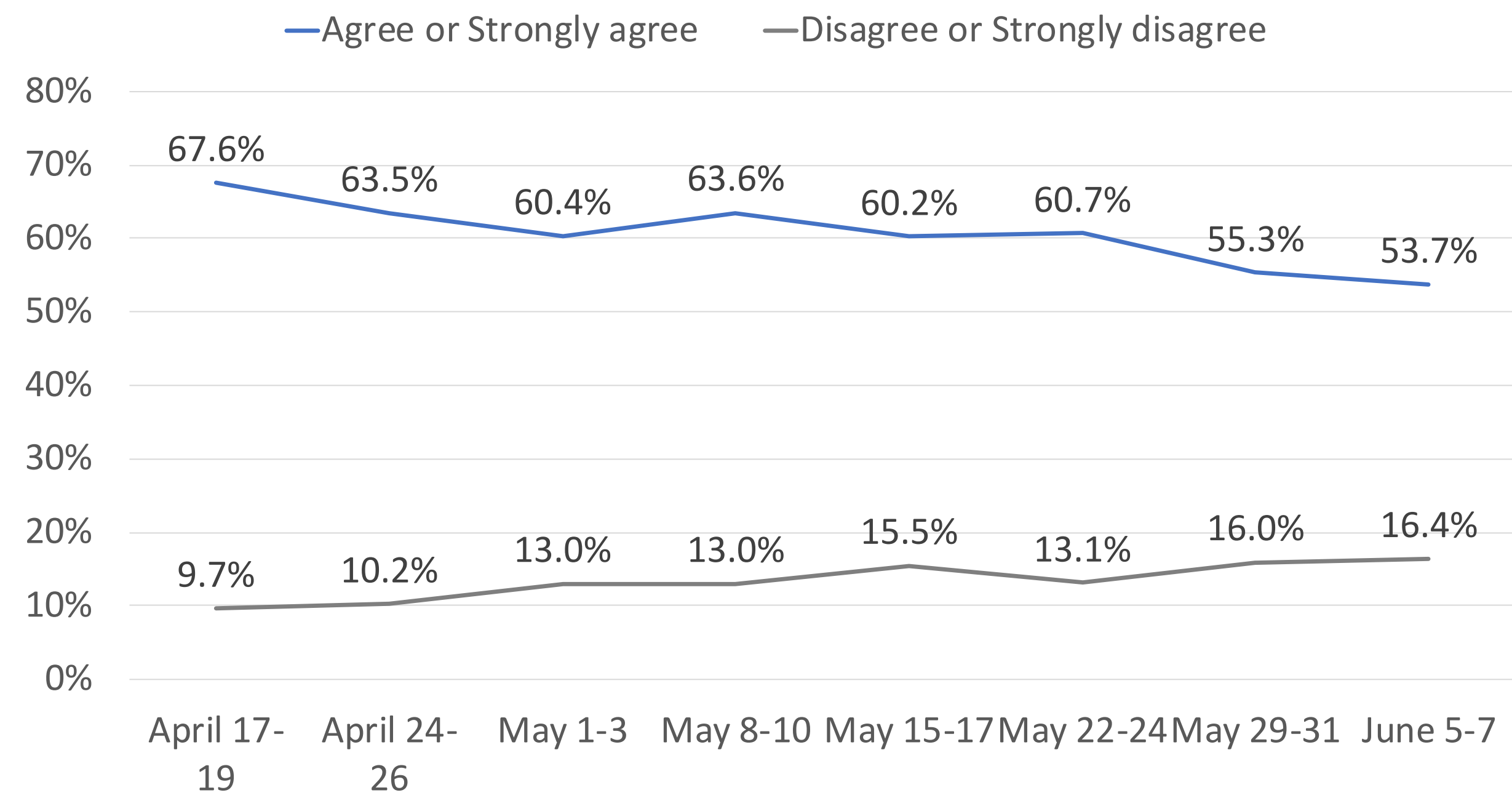
Travelers in Community are Unwanted

How much do you agree with the following statement?

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



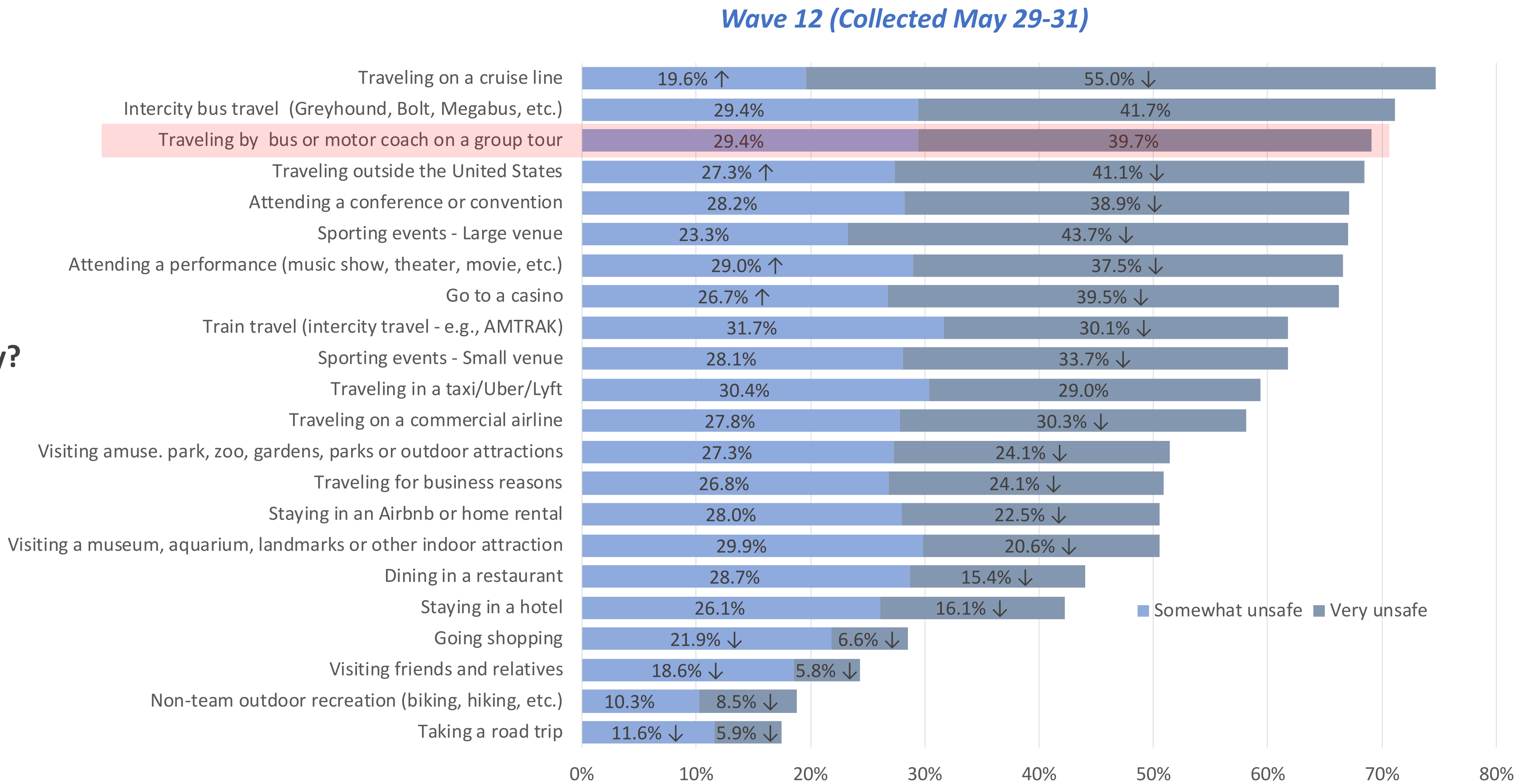
(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)



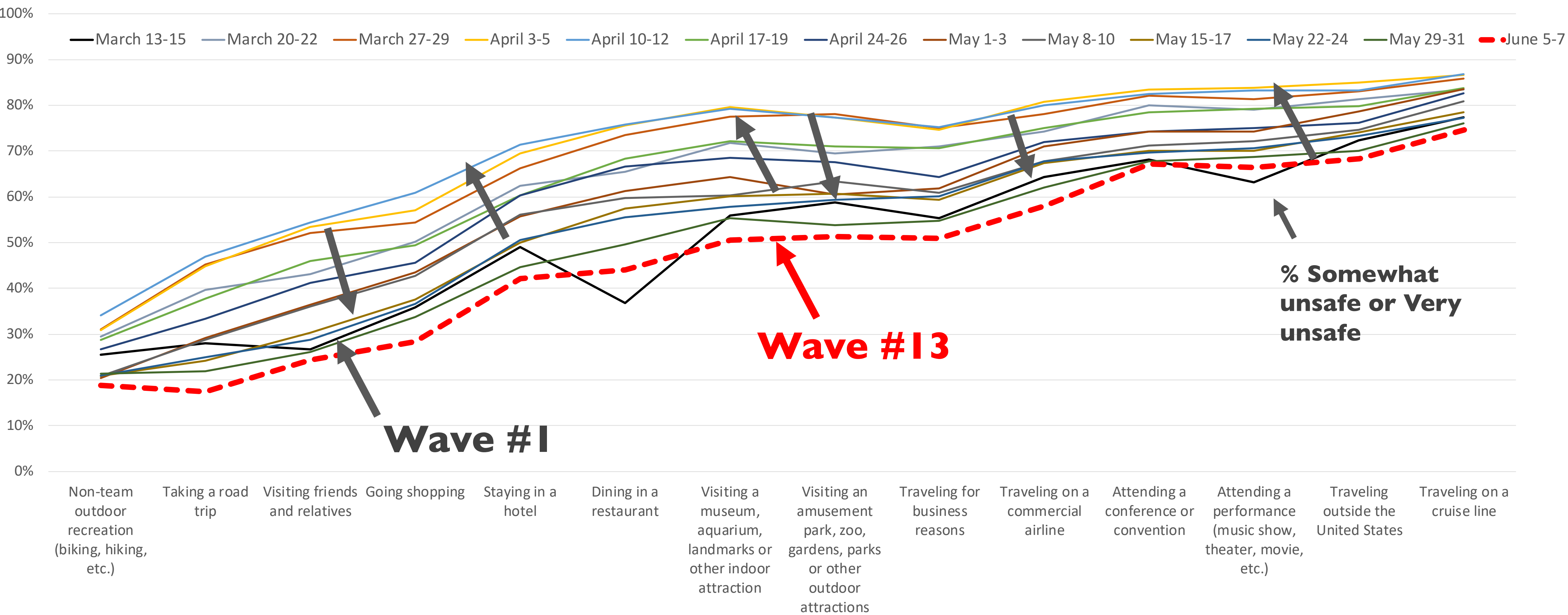
Perceived Safety of Travel Activities (Wave 13)

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

(Base: Wave 13 data. All respondents, 1,214 completed surveys. Data collected May 5-7, 2020)



Perceived Safety of Travel Activities (Waves 1-13 Comparison)



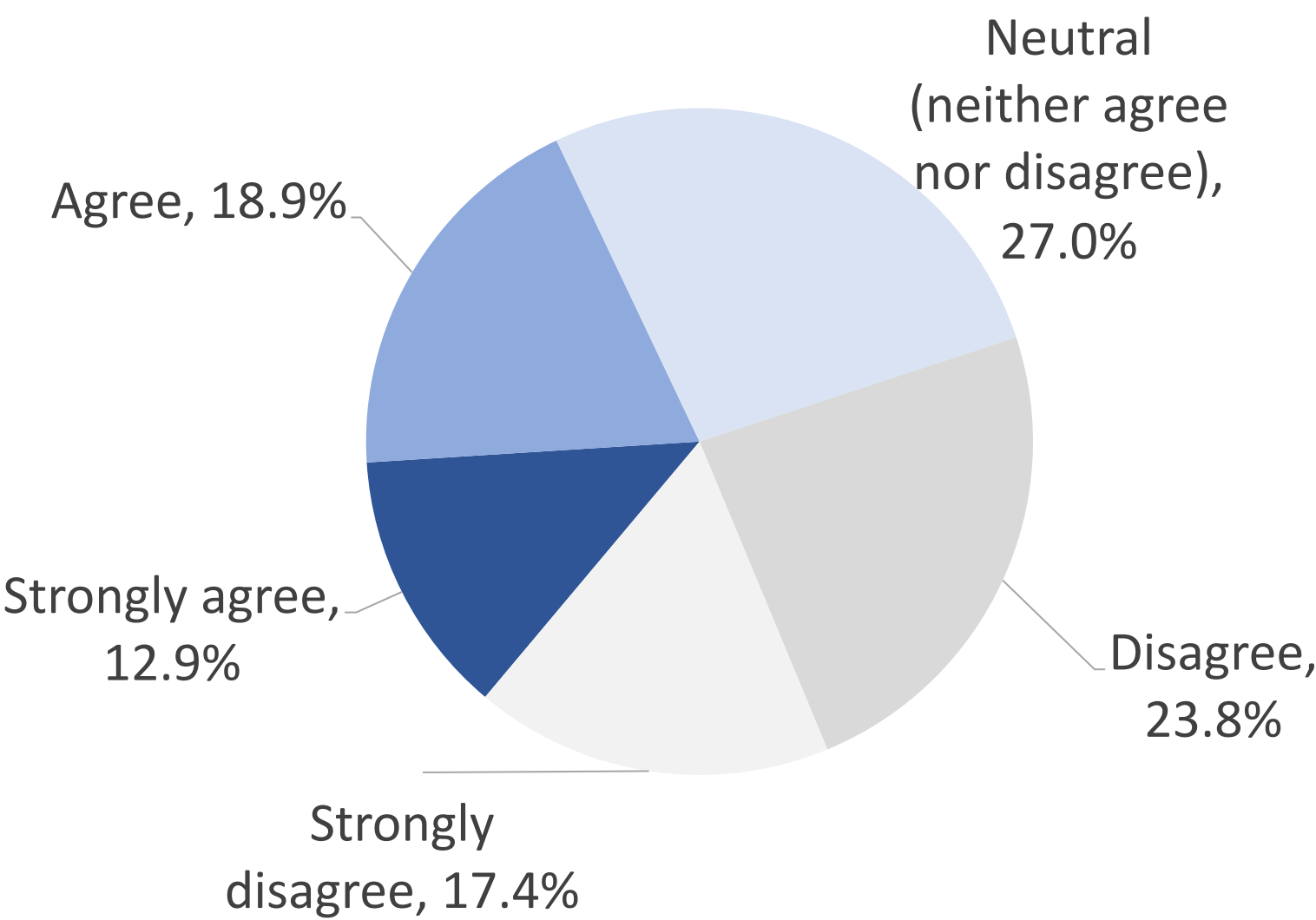
Question: At this moment, how safe would you feel doing each type of travel activity?

(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 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 and June 5-7, 2020)

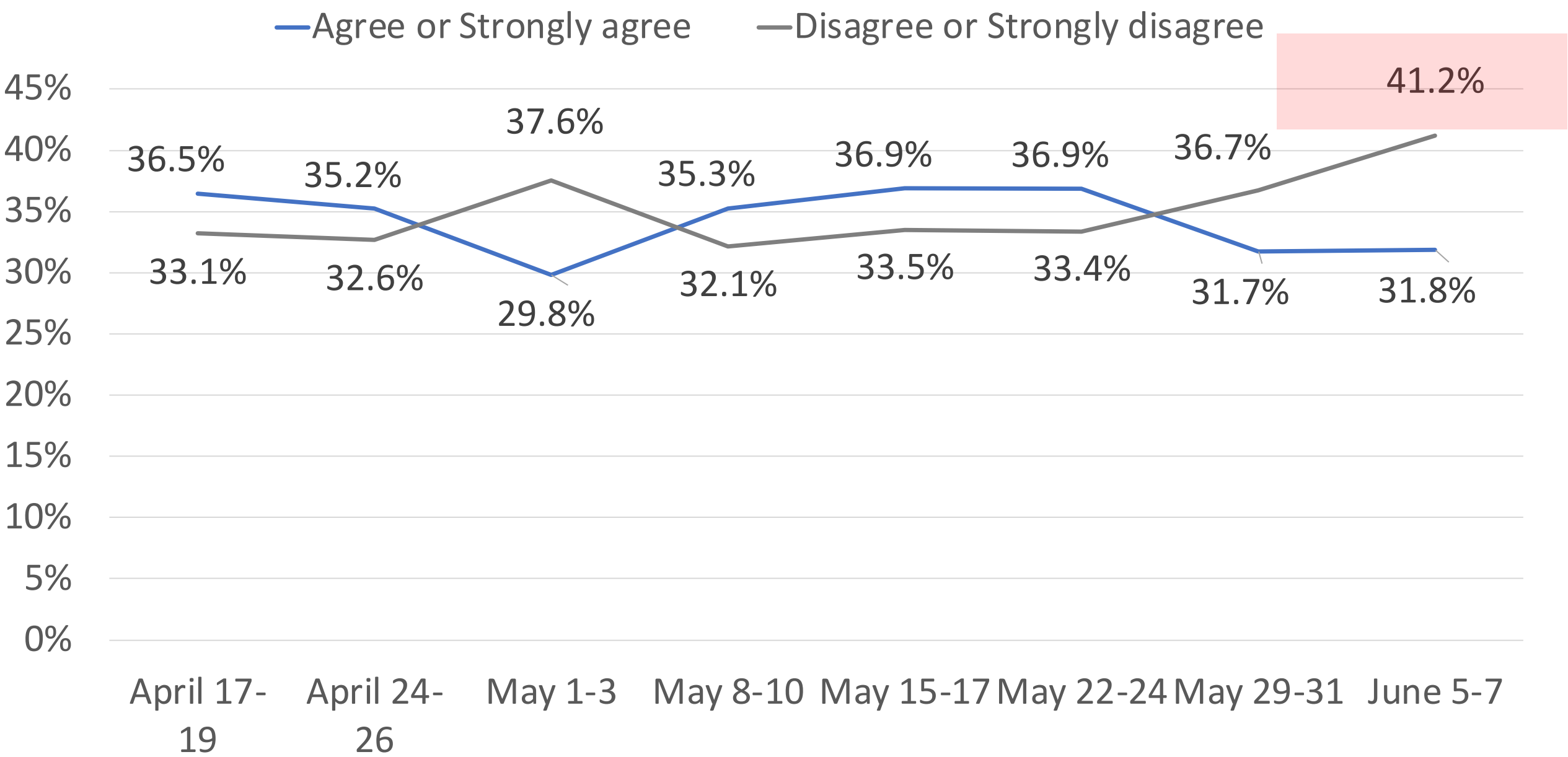
Won't Travel Without Vaccine

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 and 1,214 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)



A collection of travel-related items including a straw hat, a camera, sunglasses, a smartphone, and a passport, arranged on a light green background with tropical leaves.

KEY TAKEAWAYS

- **American travelers' feelings about their health, financial and travel safety from coronavirus continue to improve**
- **Still, these metrics remain at abnormally high levels**
- **Recent social unrest worsens the near-term outlook for some**

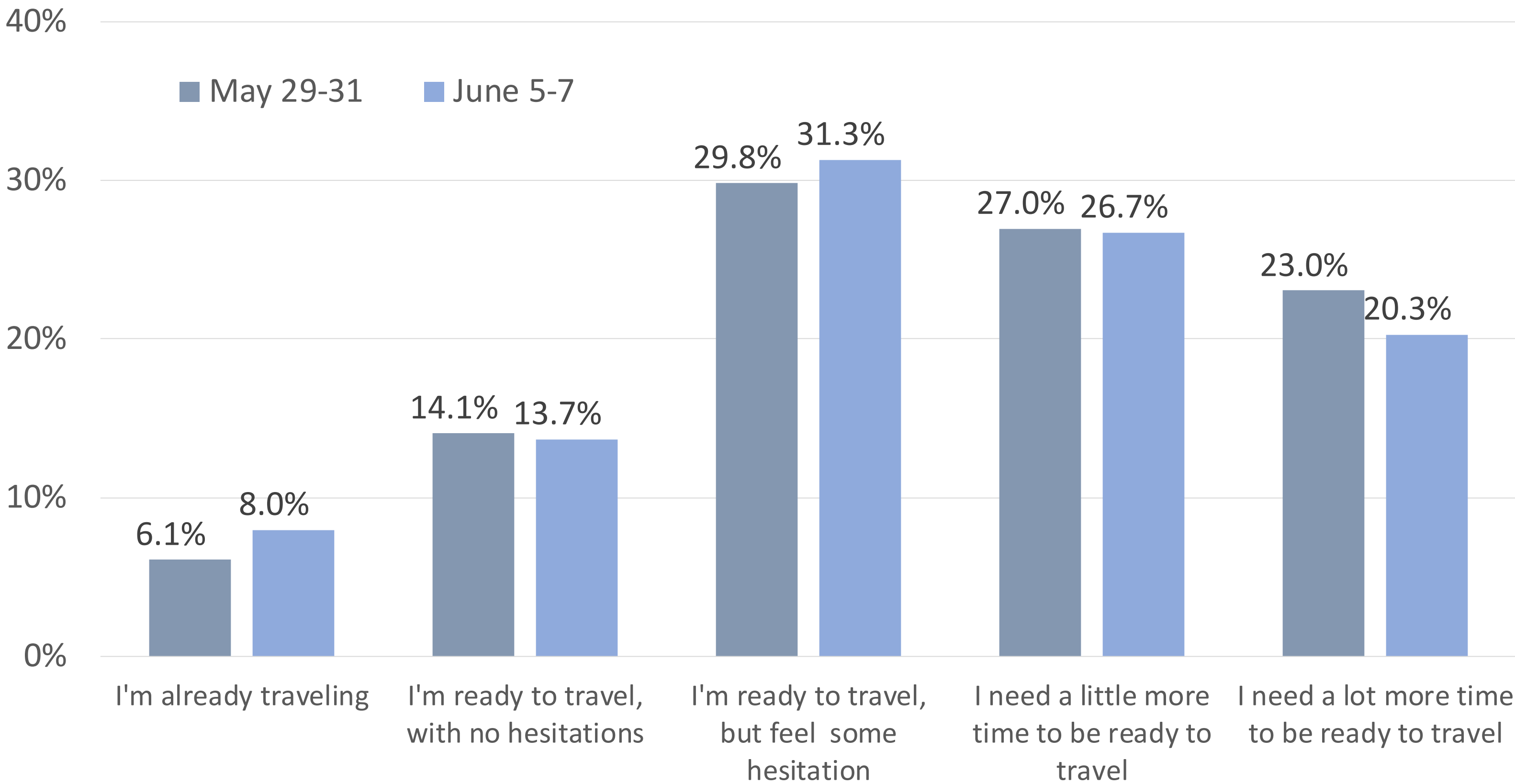
A hand is visible from a car window, giving a thumbs up gesture. The background shows a blurred road and trees, suggesting a travel setting. The text "Feelings on Travel Readiness" is overlaid in white.

Feelings on Travel Readiness

Current State of Mind Regarding Travel

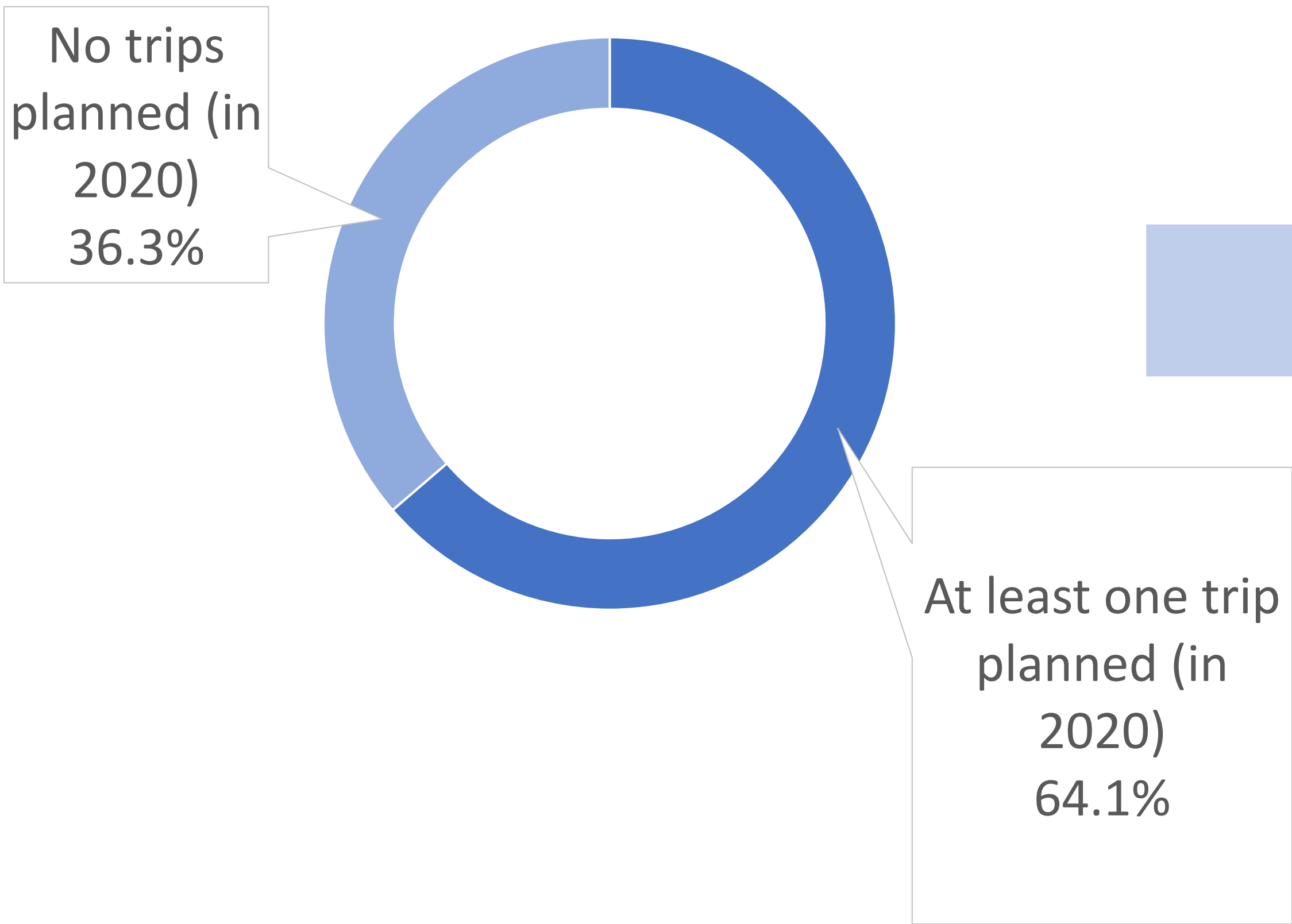
Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

(Base: All respondents, 1,257 completed surveys. Data collected May 29-31, 2020)

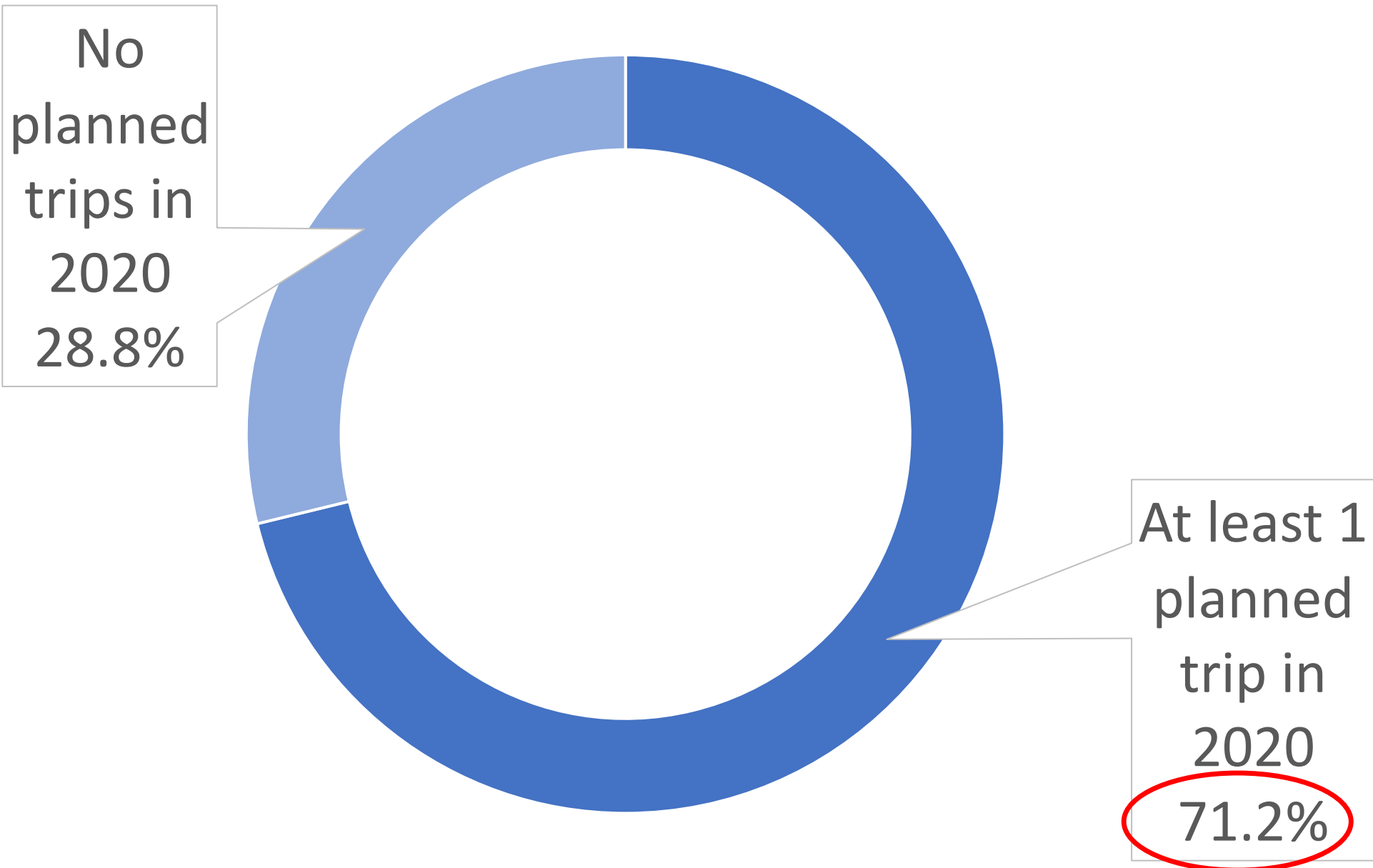


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

3 Weeks Ago

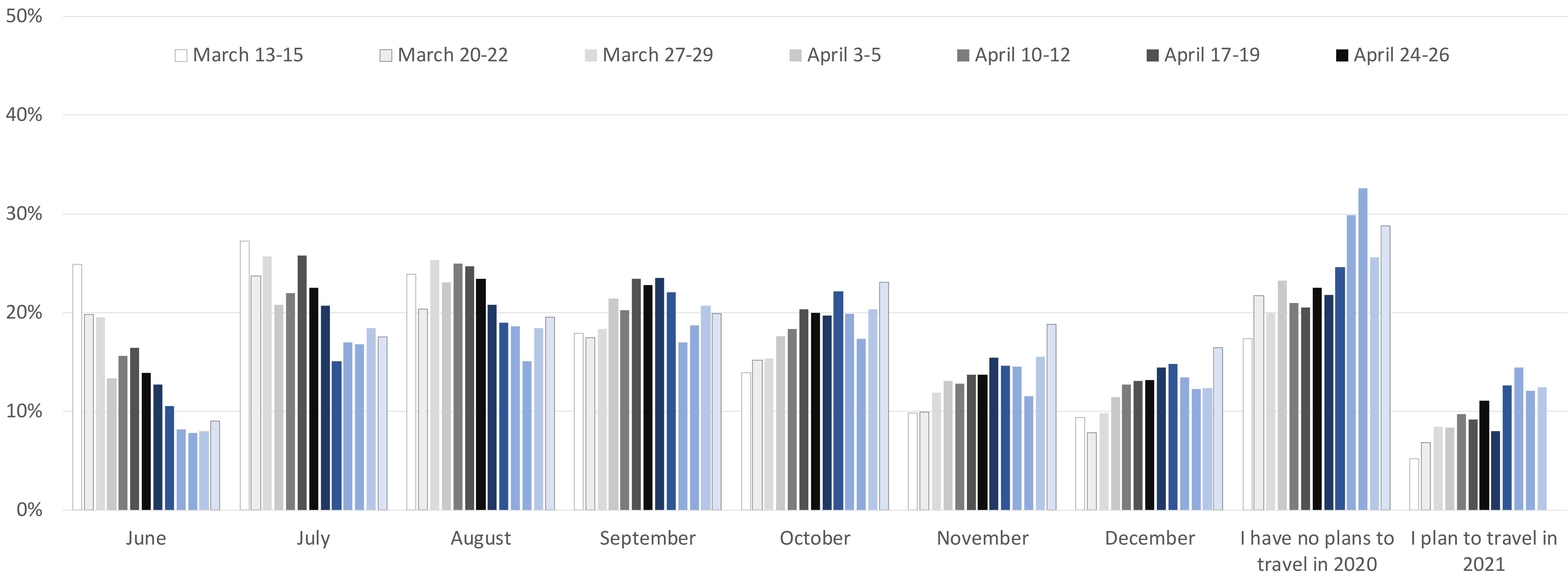


Today



Upcoming Travel Plans

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

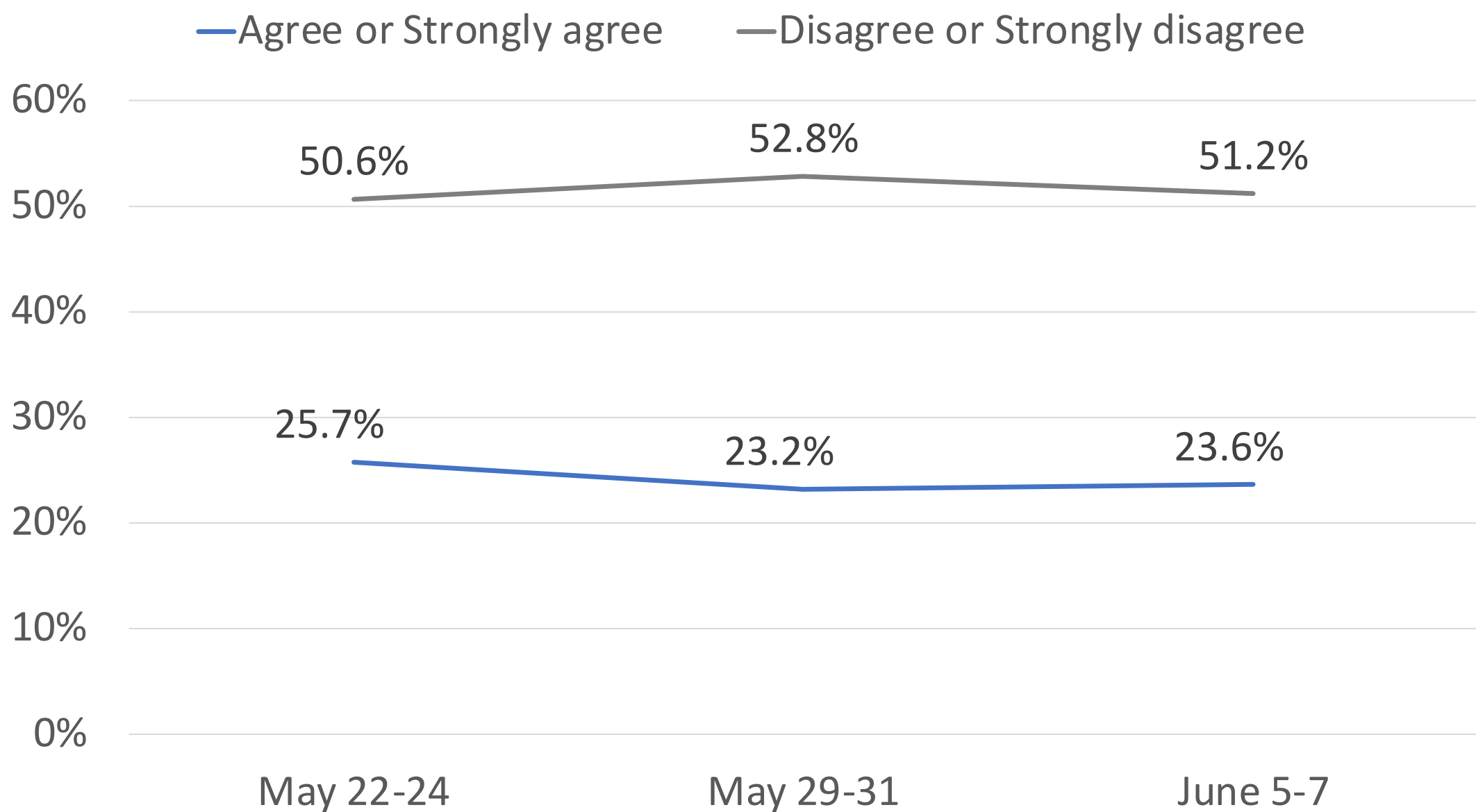
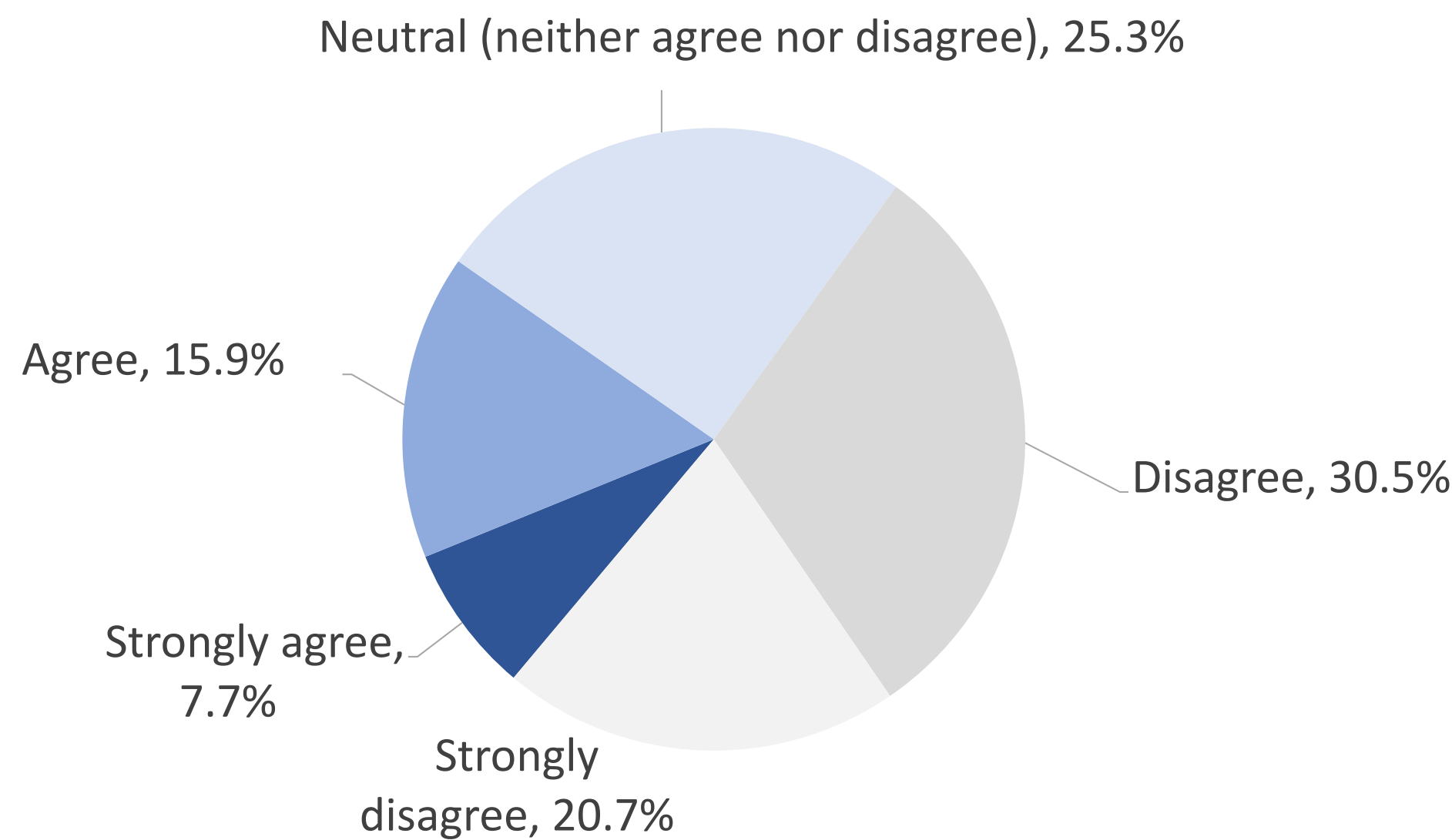


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

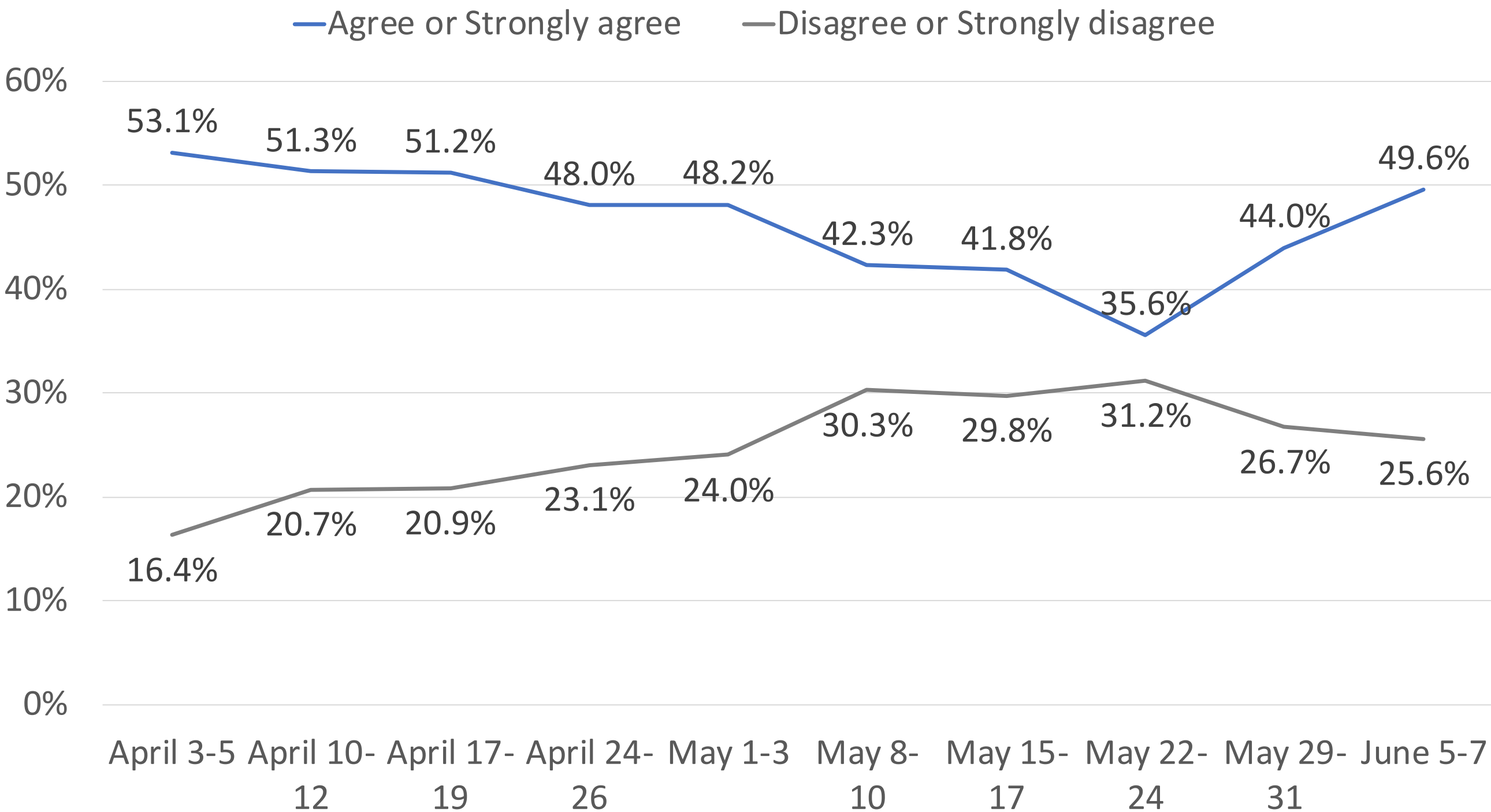
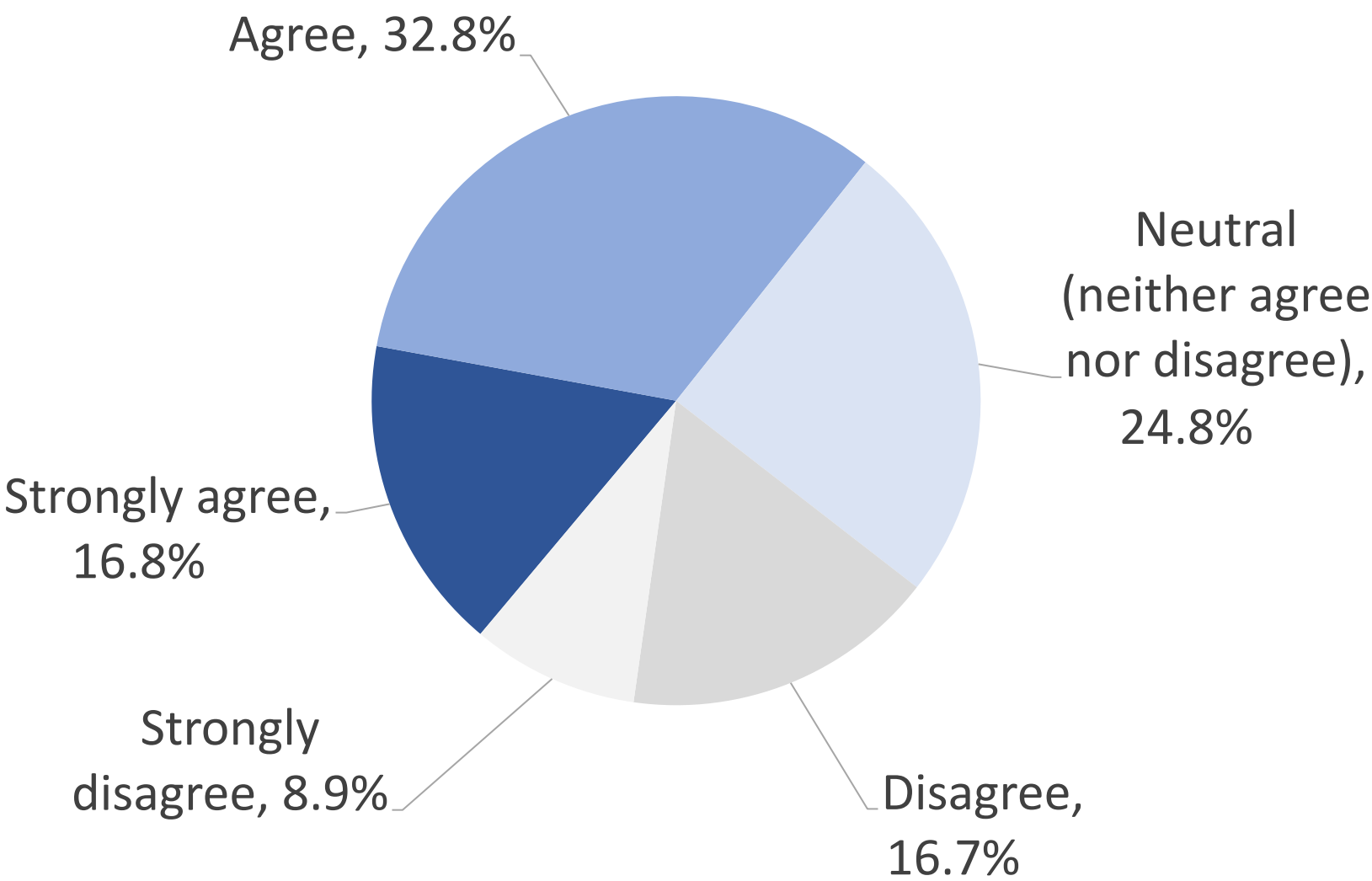


(Base: All respondents, 1,223, 1,257 and 1,214 completed surveys. Data collected, May 22-24, 29-31 and June 5-7, 2020)

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.

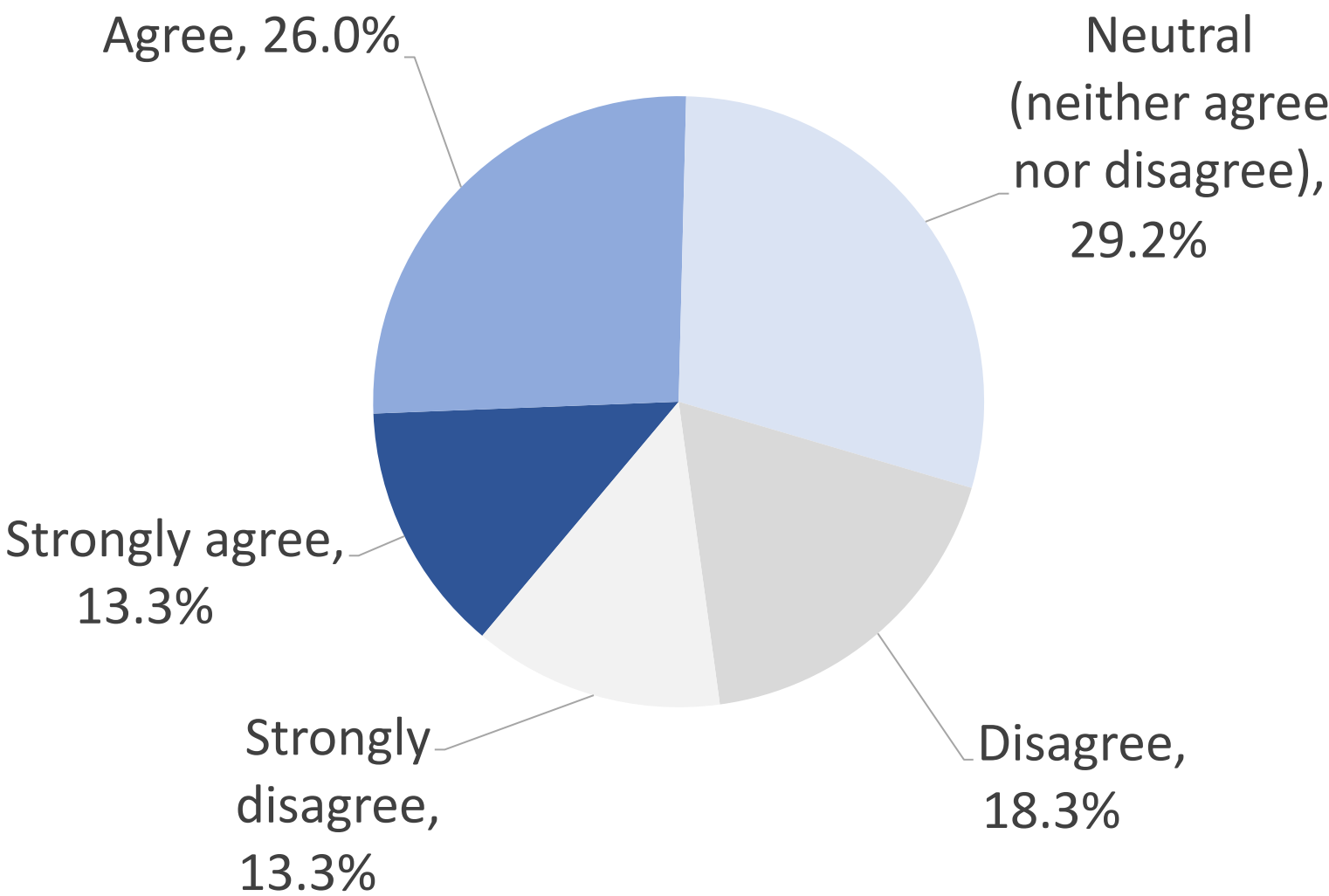


(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

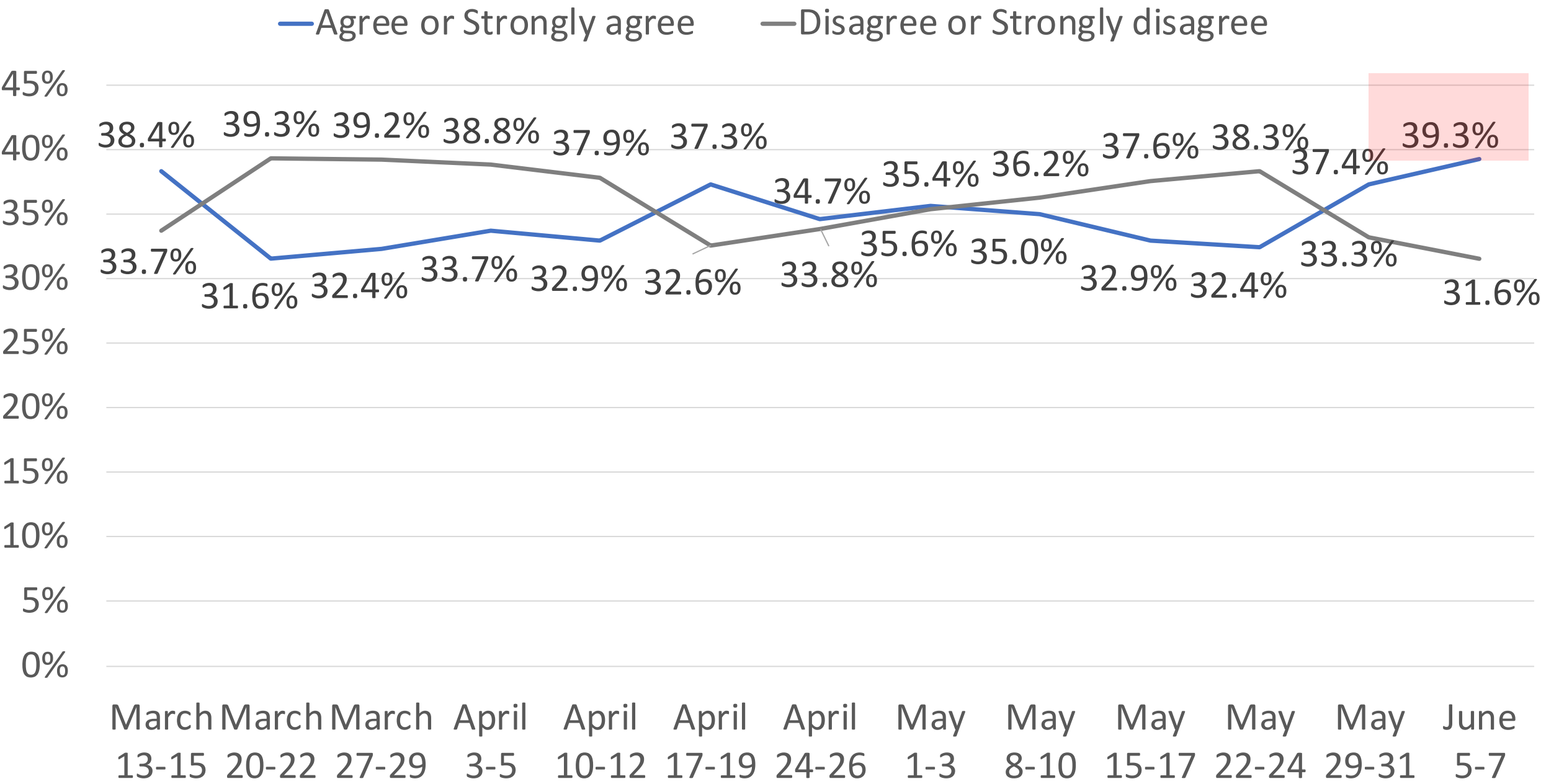
Discounts and Price Cuts

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.



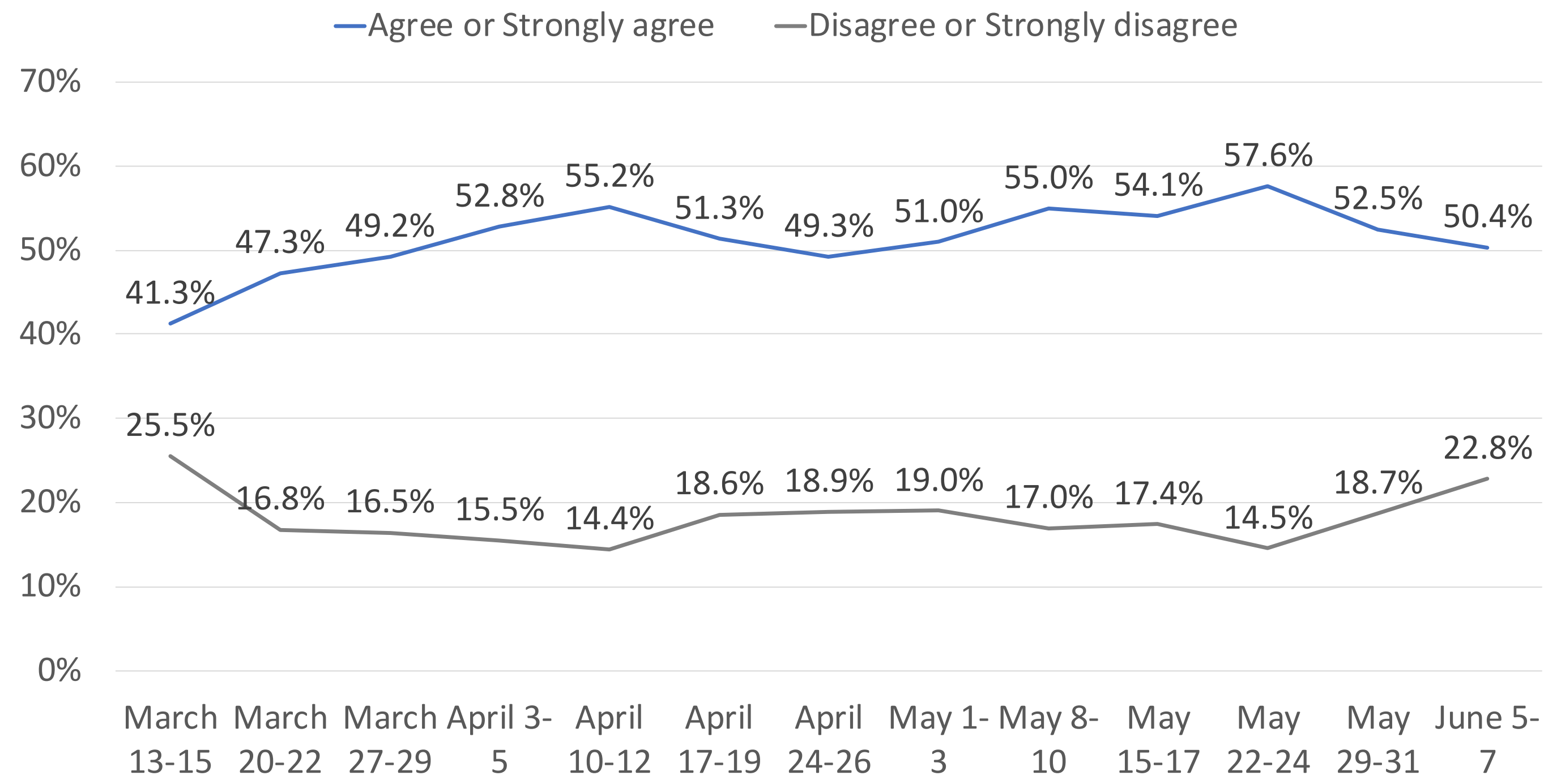
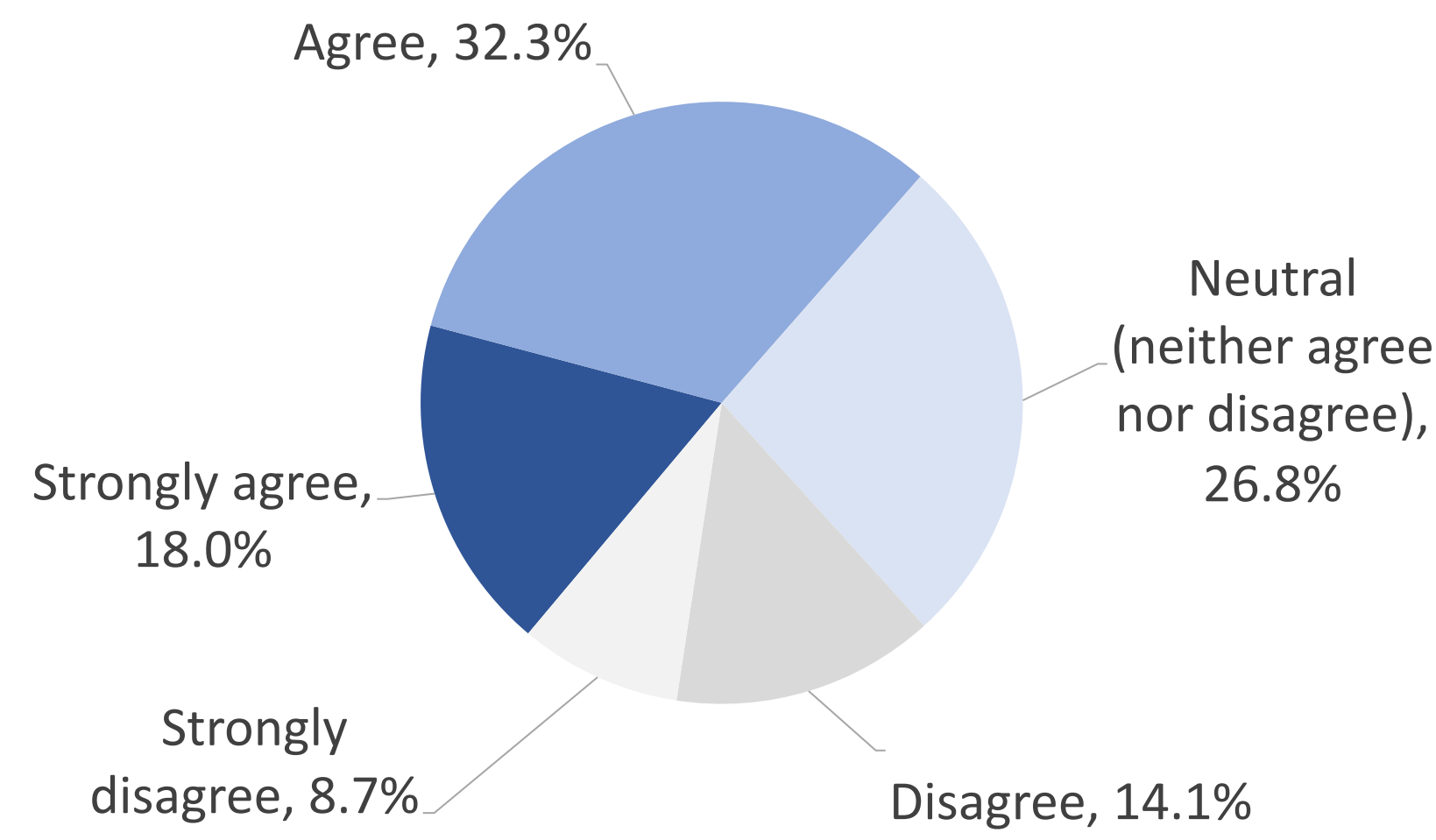
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)



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).

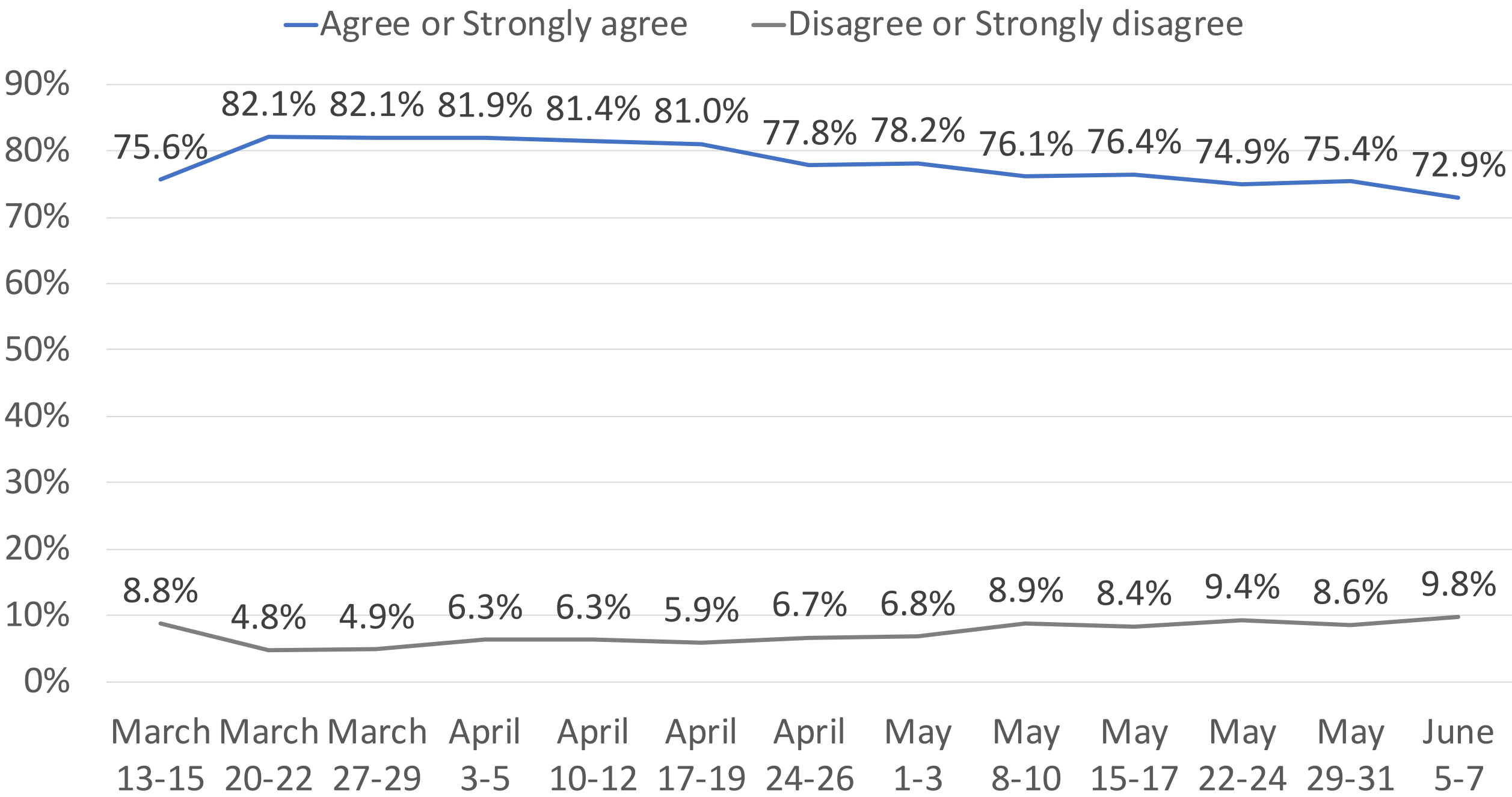
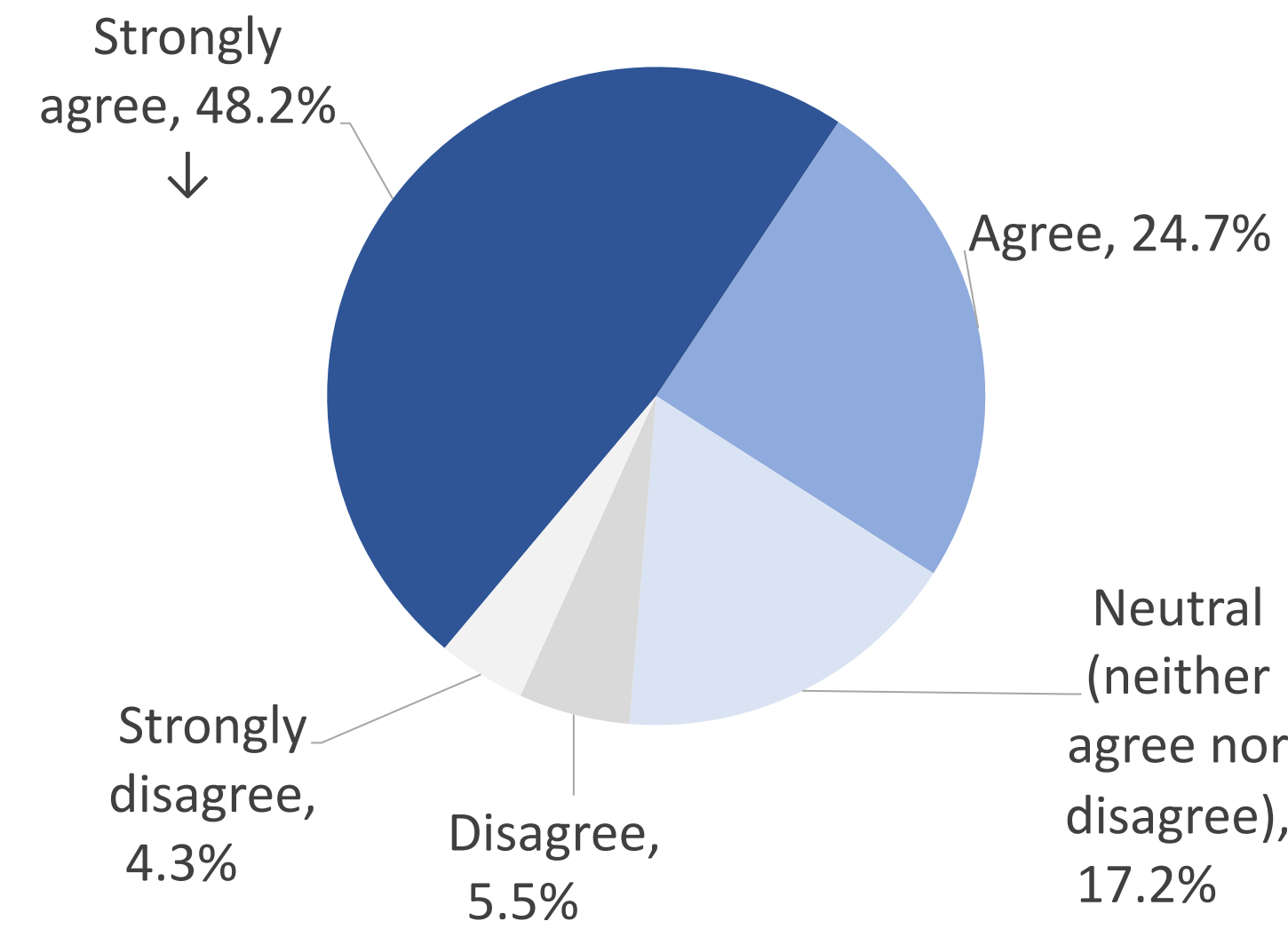


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

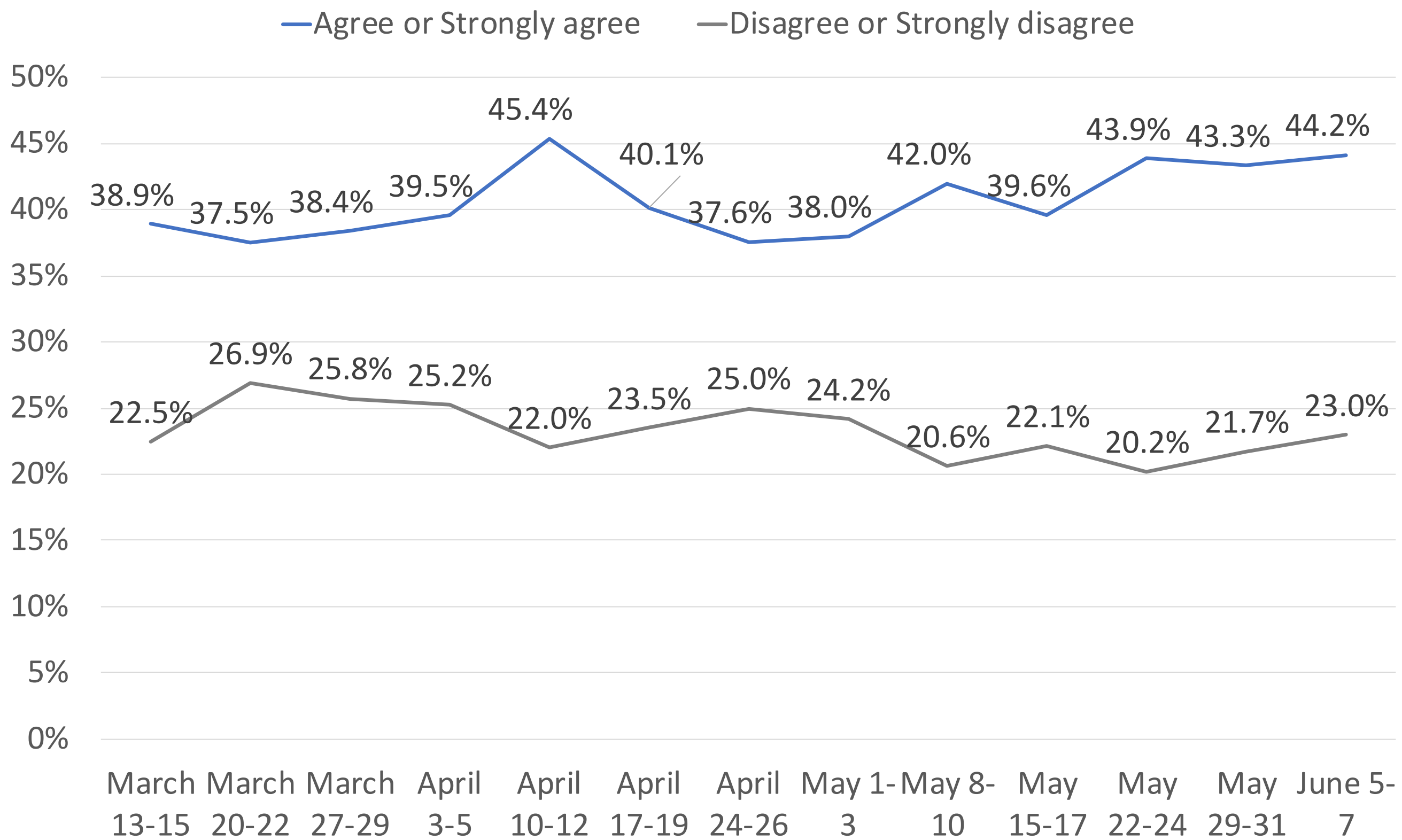
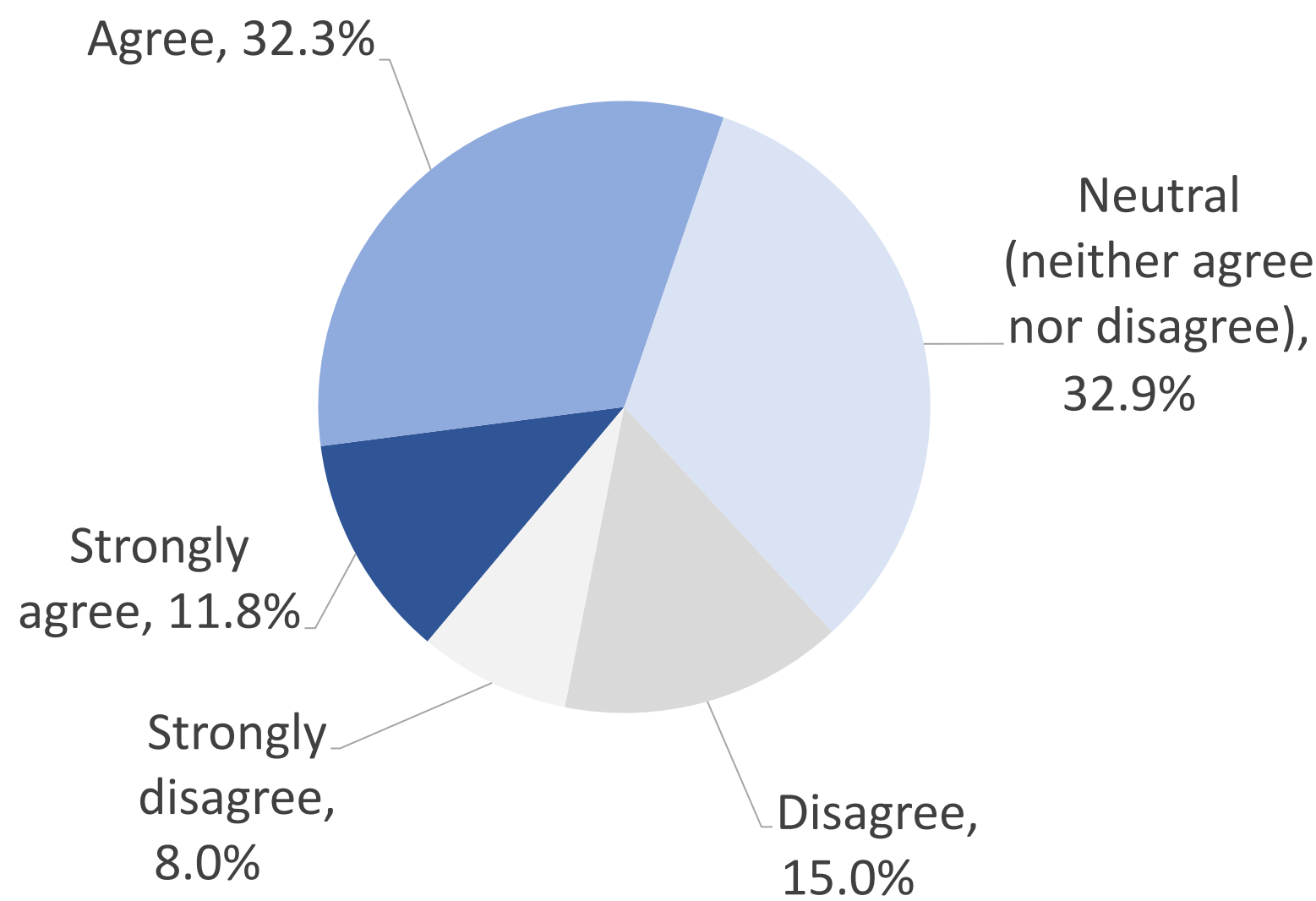


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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.

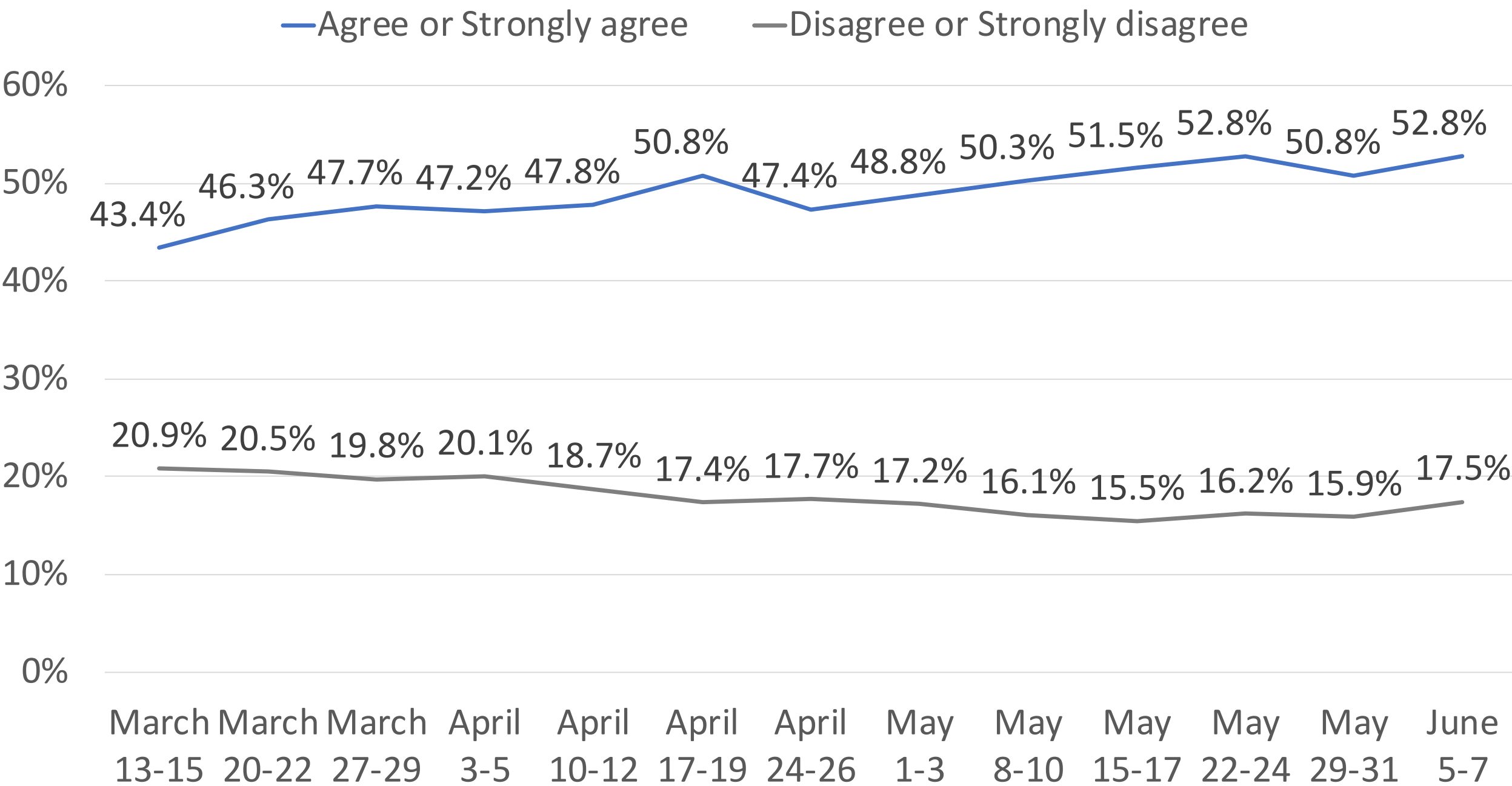
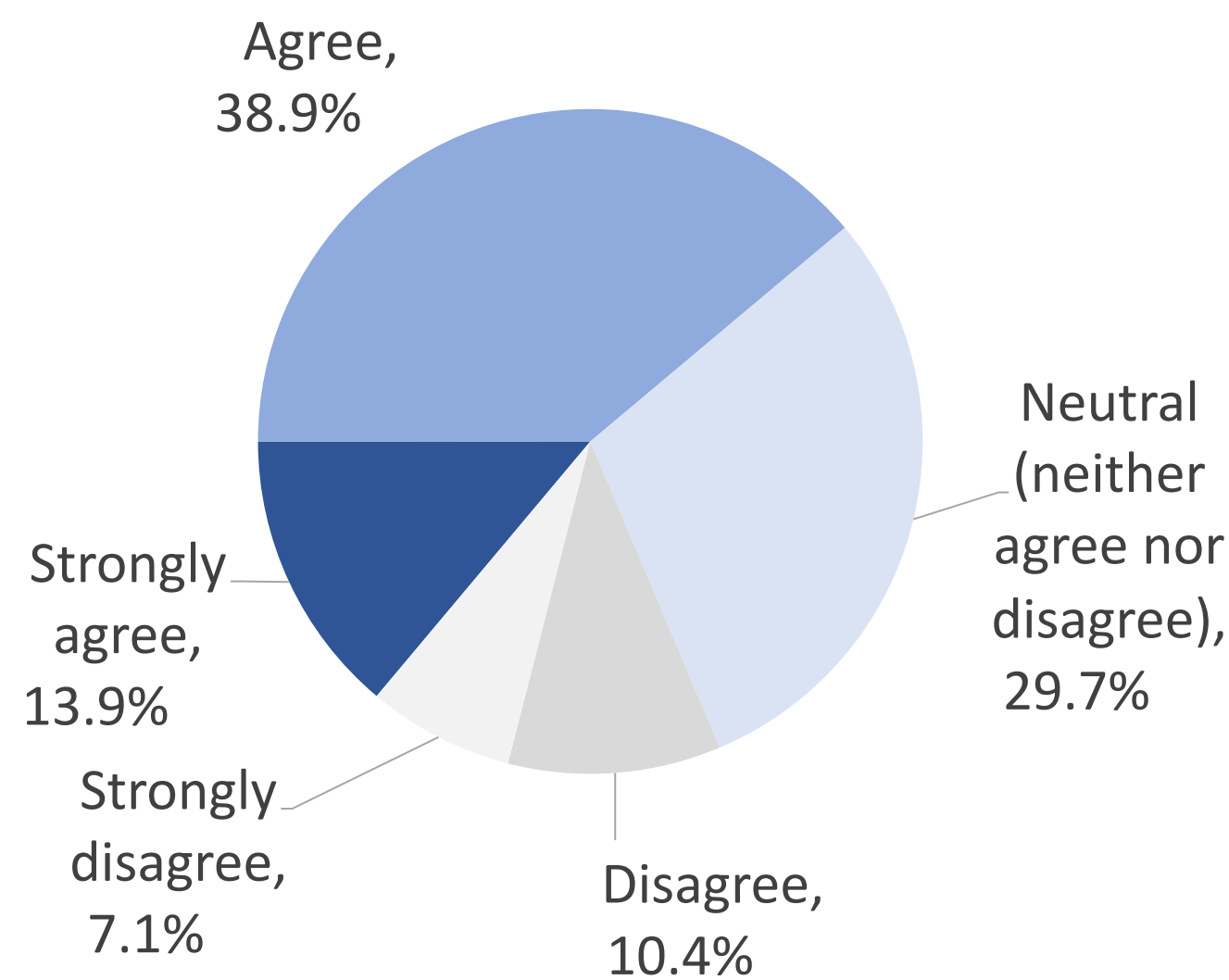


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

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).



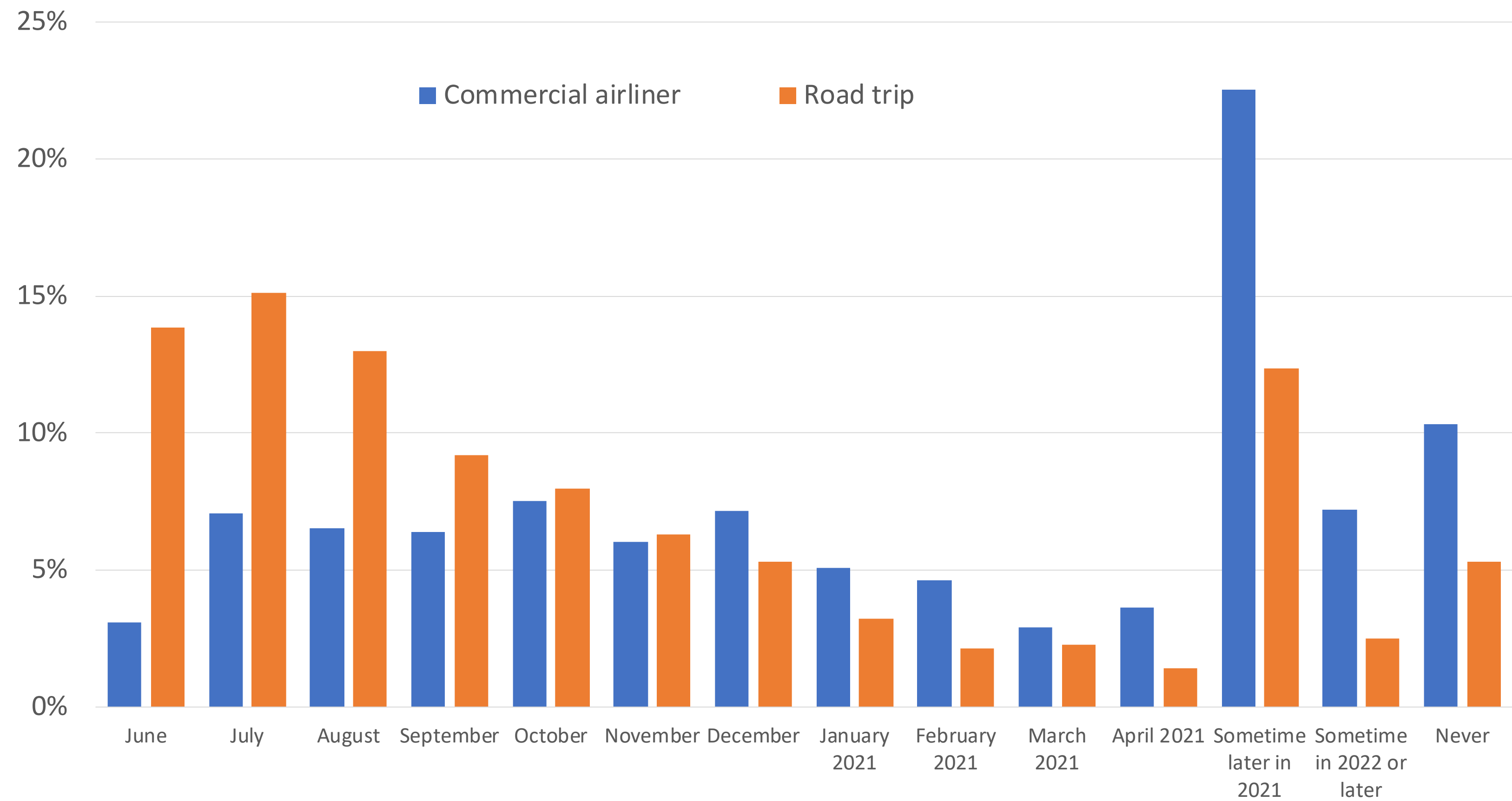
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

Month of Next Road and Commercial Airline Trip

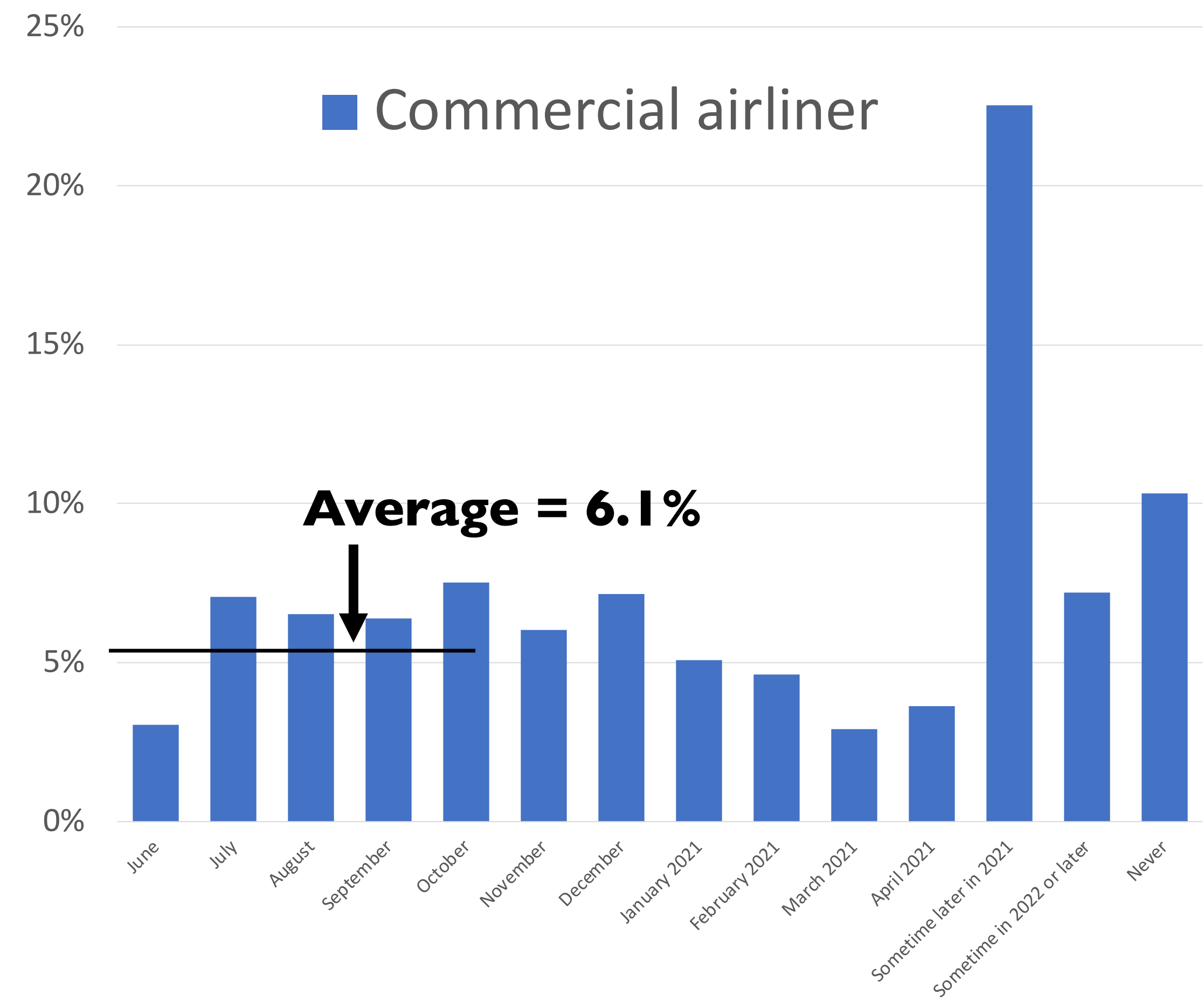
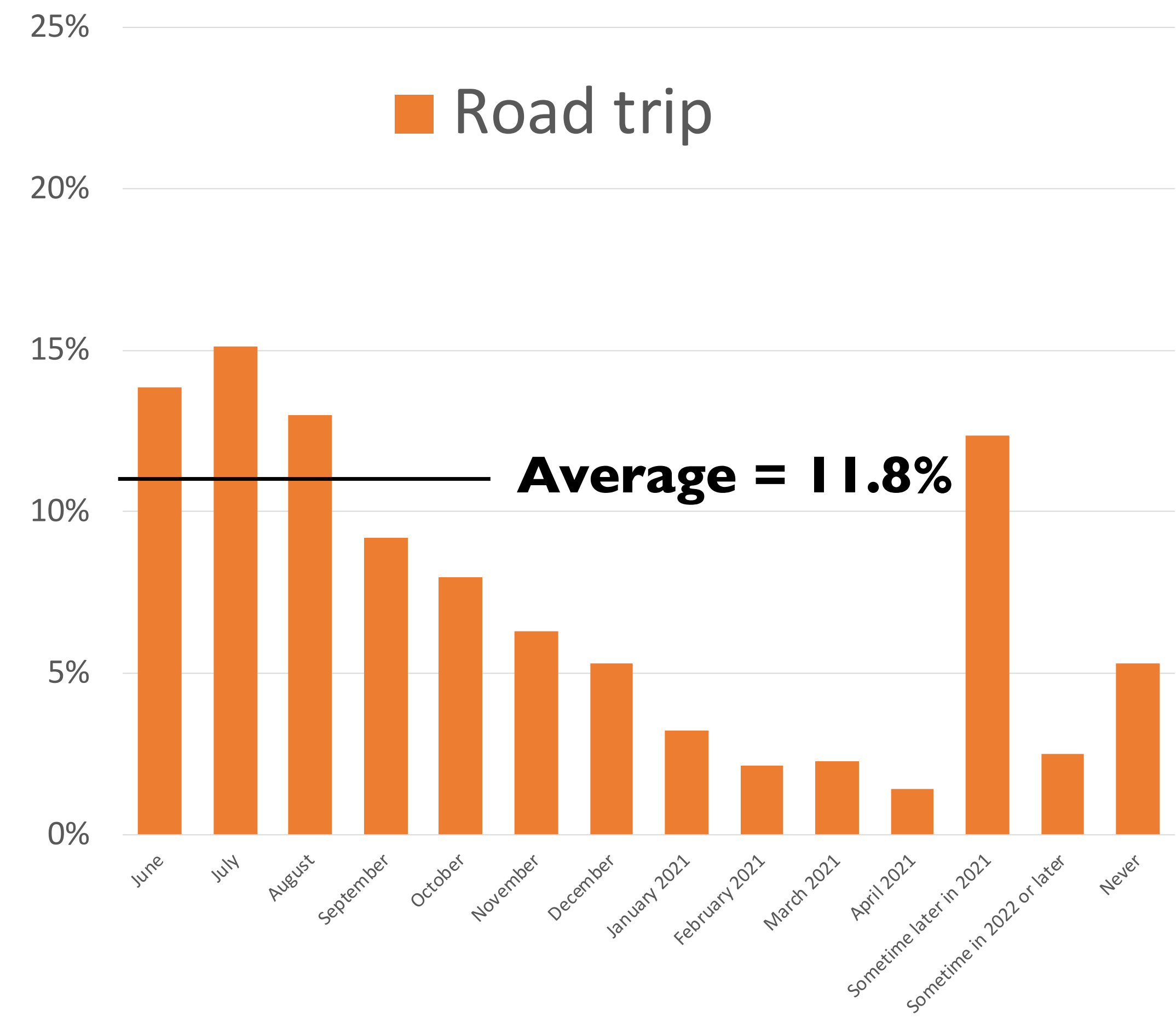
Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

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

(Base: Wave 13. All respondents, 1,214 completed surveys. Data collected June 7-9, 2020)



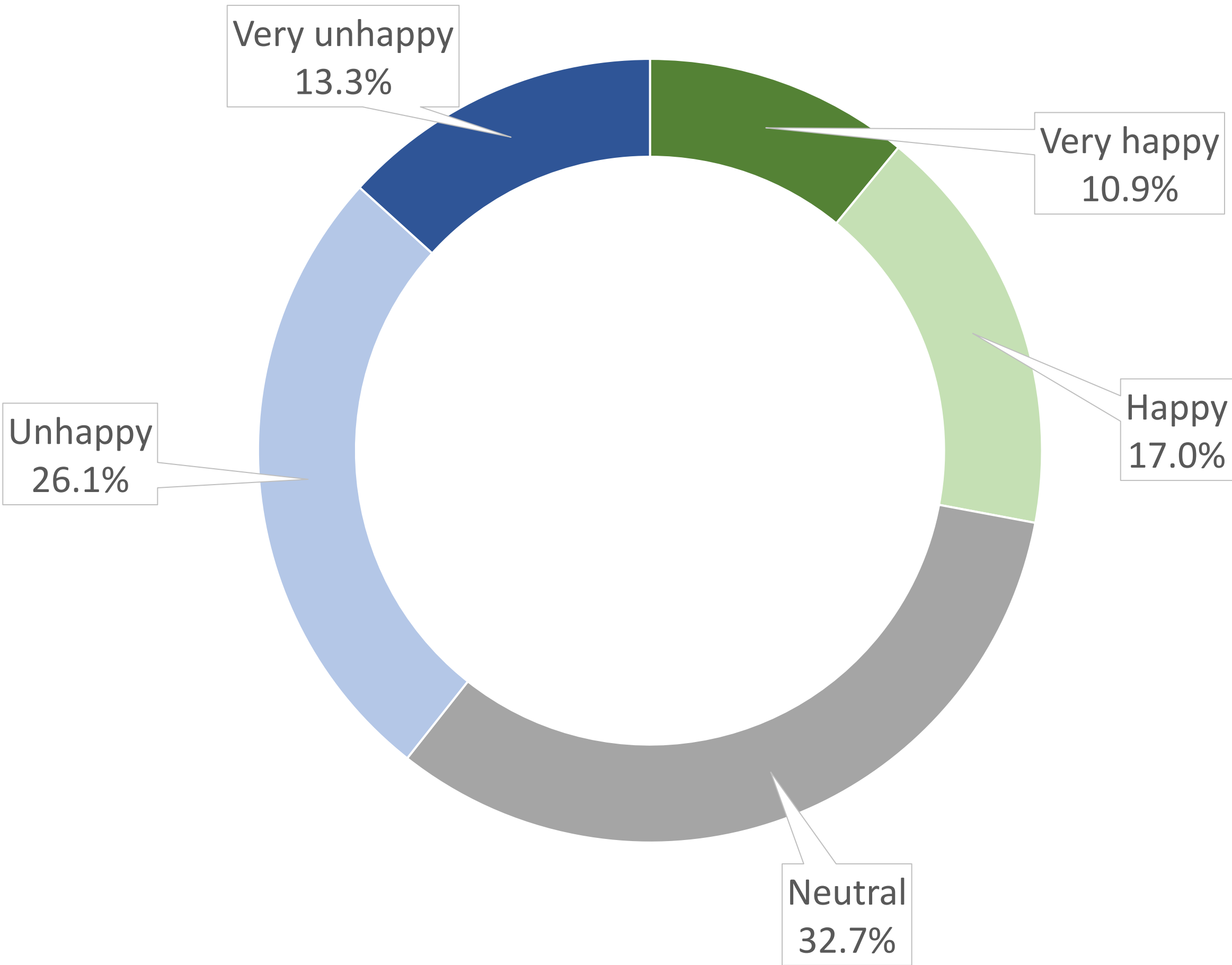
Road vs. Air: Deconstructed



Feelings About Friends/Family Traveling by Air in Current Environment

Question: How would you feel if a close friend or family member told you they had just purchased airline tickets for a trip some time in June?

(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)





KEY TAKEAWAYS

- **Increasing numbers of Americans report they are already traveling or ready to travel**
- **Over 70 percent will take at least one leisure trip in the remainder of 2020**
- **Half expect to be traveling in the Fall**
- **Lessening numbers expect to staycation and avoid international travel**
- **The majority of Americans still exhibit some hesitation around air travel, largely putting it off until later and opting for road trips this summer**

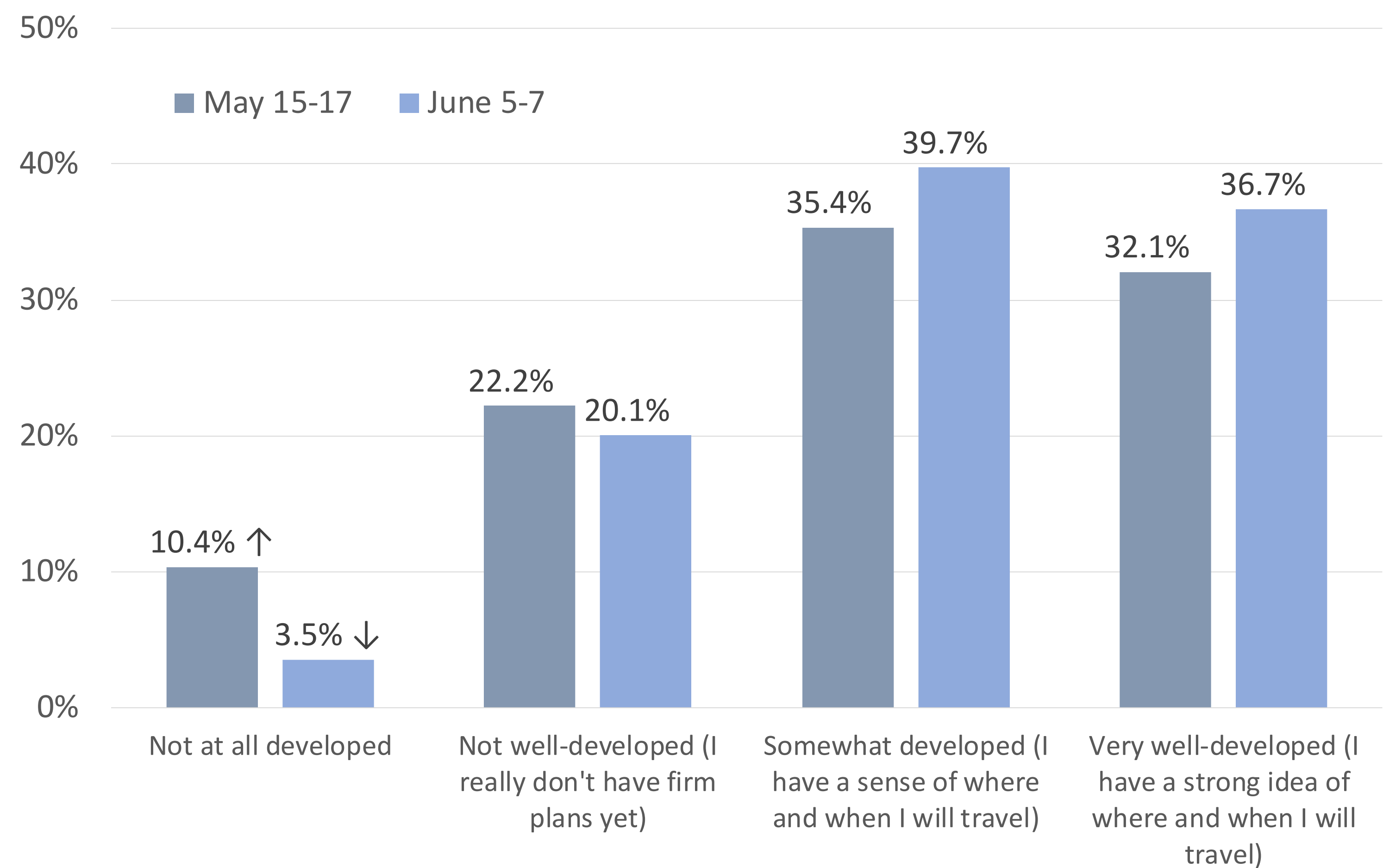
Profile of Americans' Next Leisure Trips



How Well-developed is Their Trip Plan?

Question: Right now, which best describes HOW WELL-DEVELOPED the idea of this next leisure trip is in your mind? (Select one)

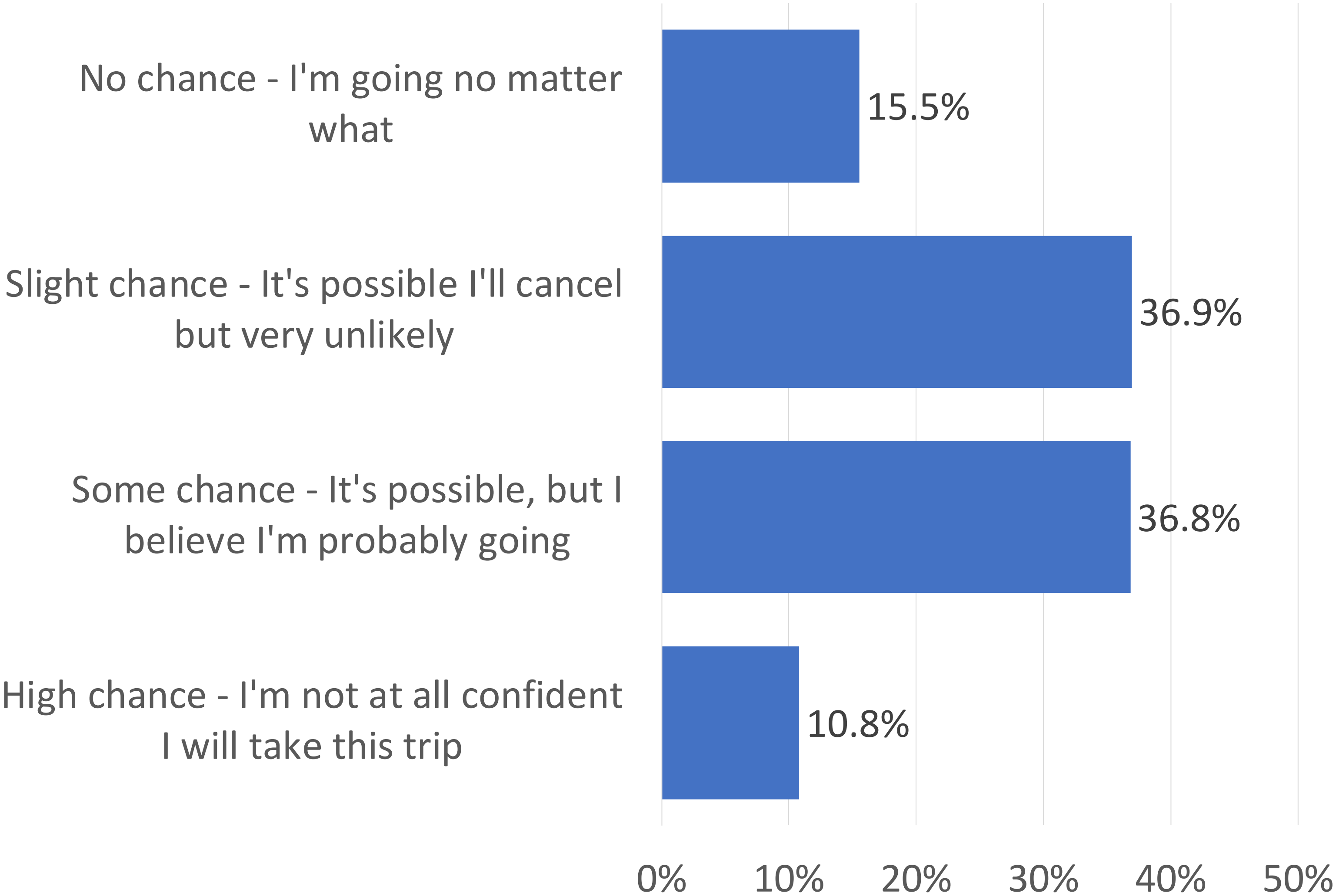
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Opinions on Trip Cancellations

Question: What are the chances that you still might cancel this next leisure trip due to the Coronavirus situation?

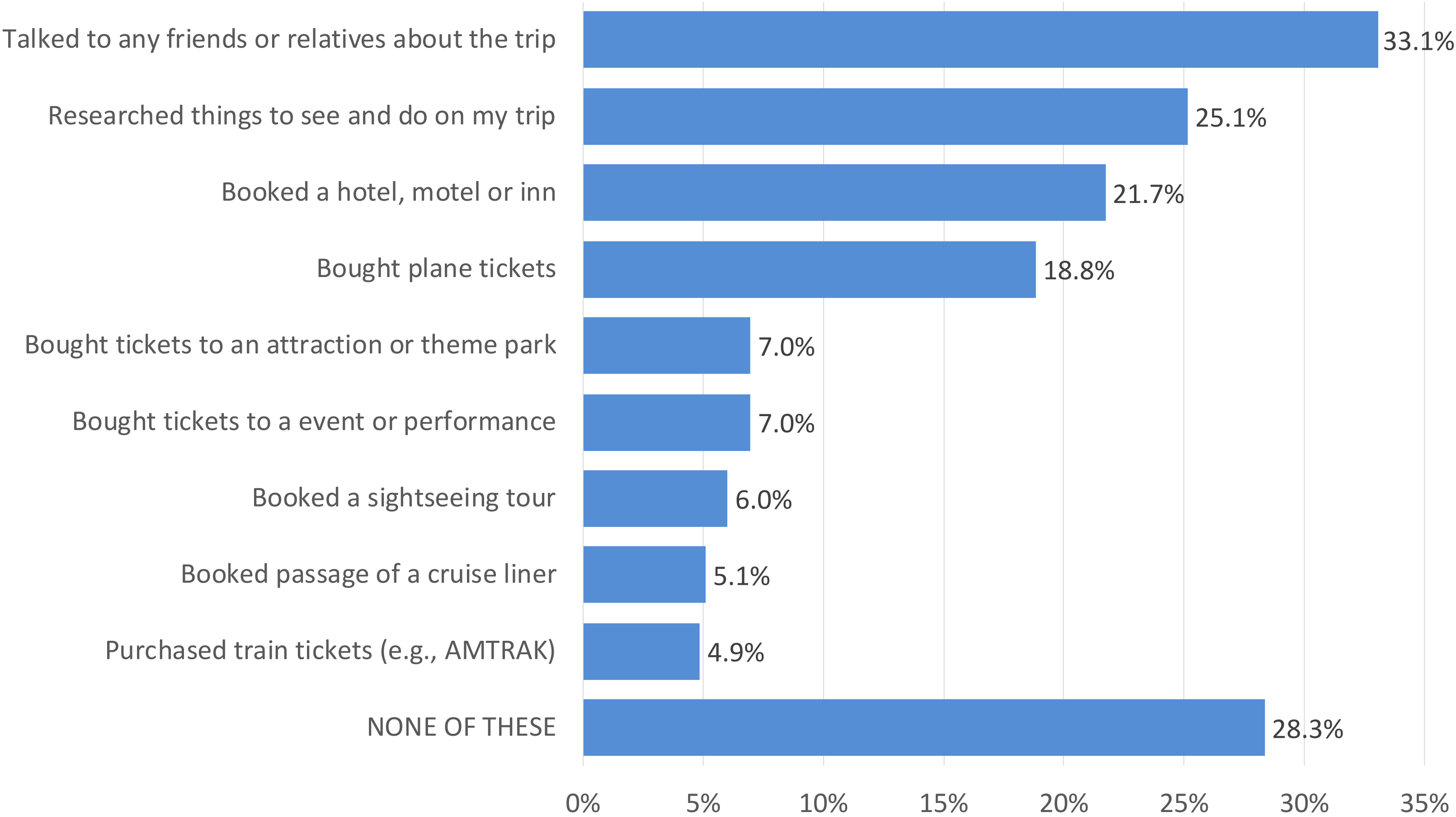
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Trip Preparations Already Completed

Question: Have you already done any of the following in preparation for your NEXT LEISURE TRIP?

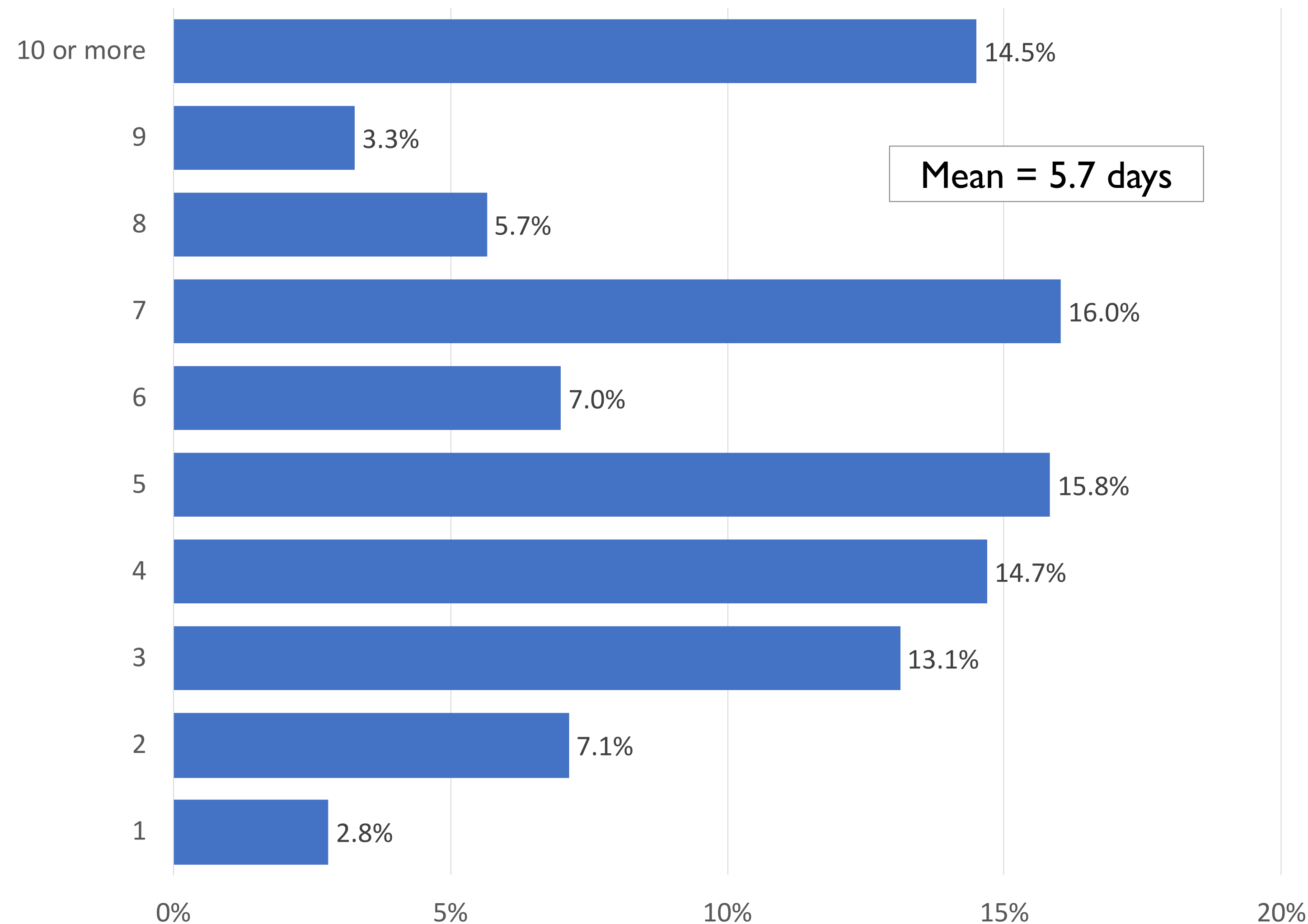
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Expected Length of Trip

Question: How many days away from home will you spend on this trip?
(Select one)

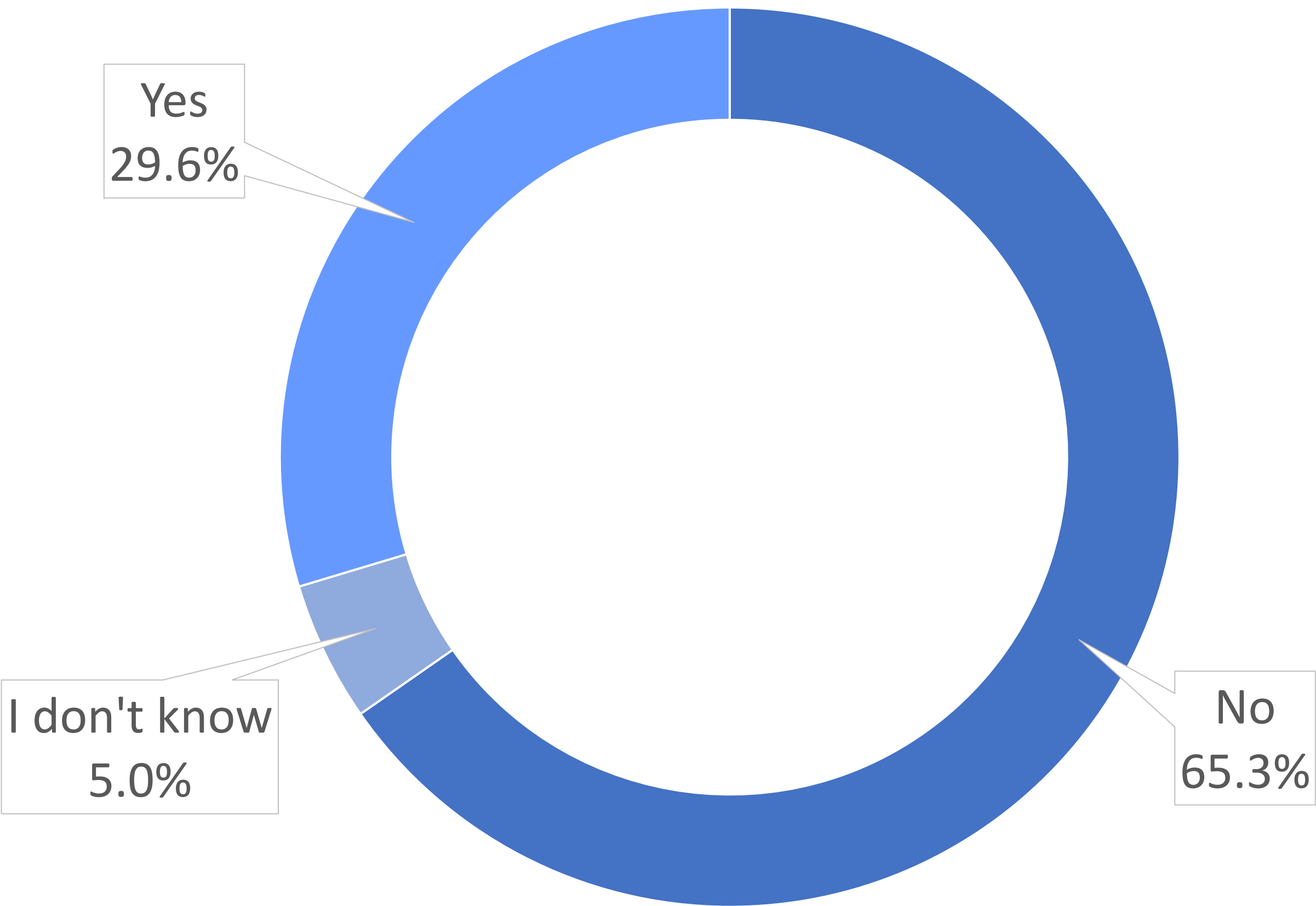
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Expanding Social Networks for Travel

Question: Will there be anyone in your travel party who does not currently live in your household?

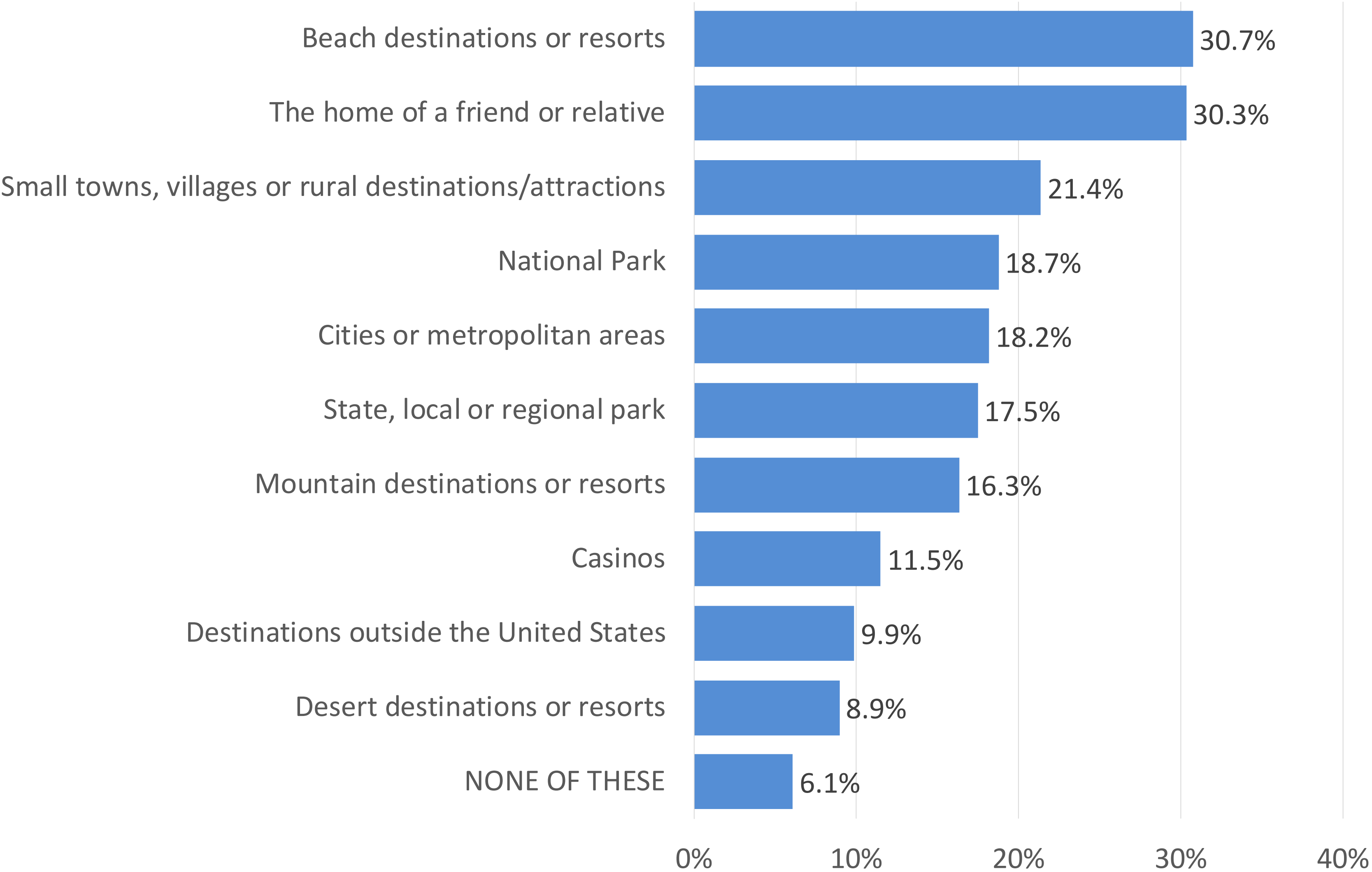
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Destination Types

Question: Which of the following will you be likely to visit on your NEXT LEISURE TRIP? (Select all that apply)

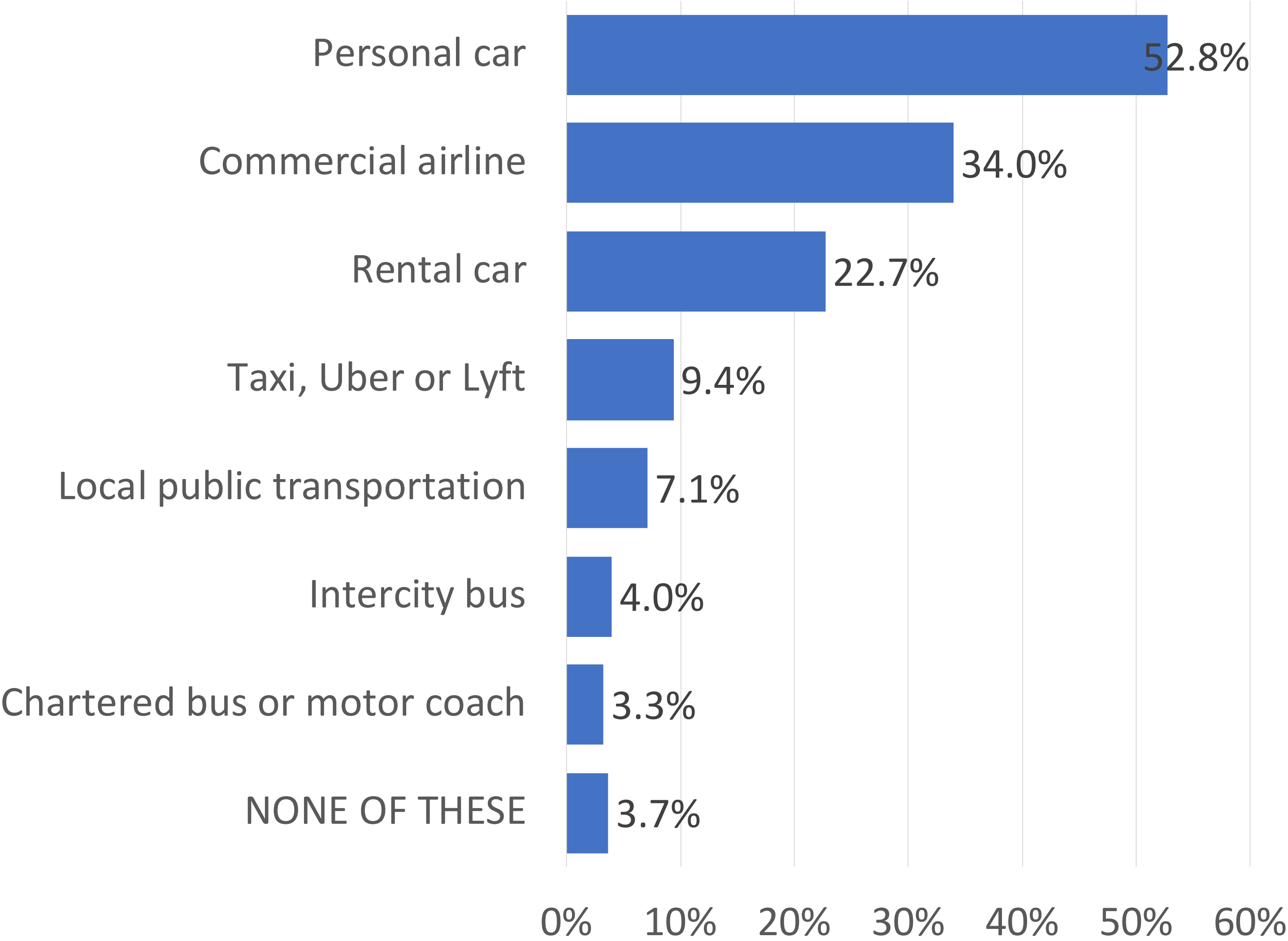
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Modes of Transportation Used

Question: Which modes of transportation are you likely to use of this trip?

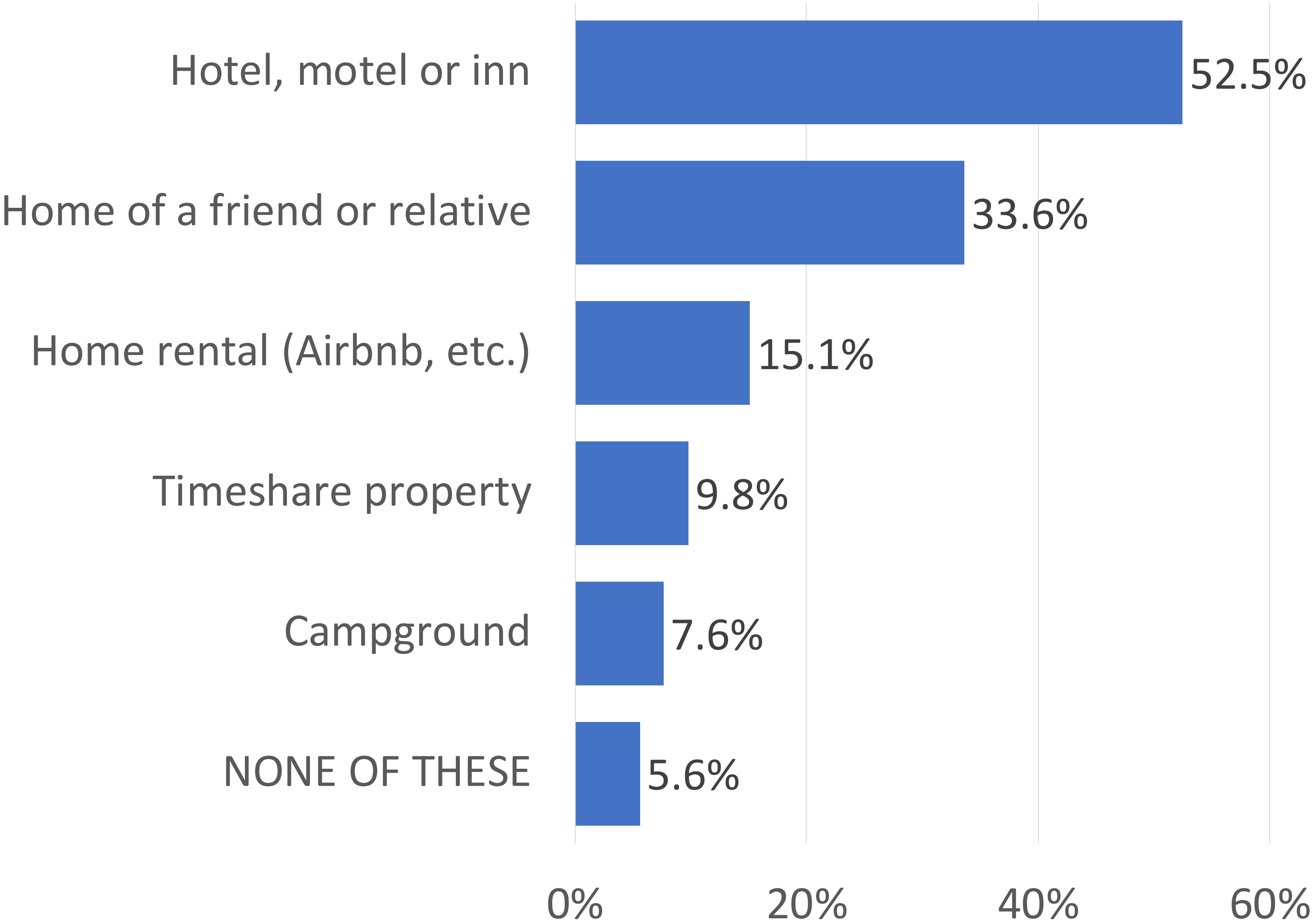
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Place of Stay

Question: Where are you likely to stay overnight on this trip?

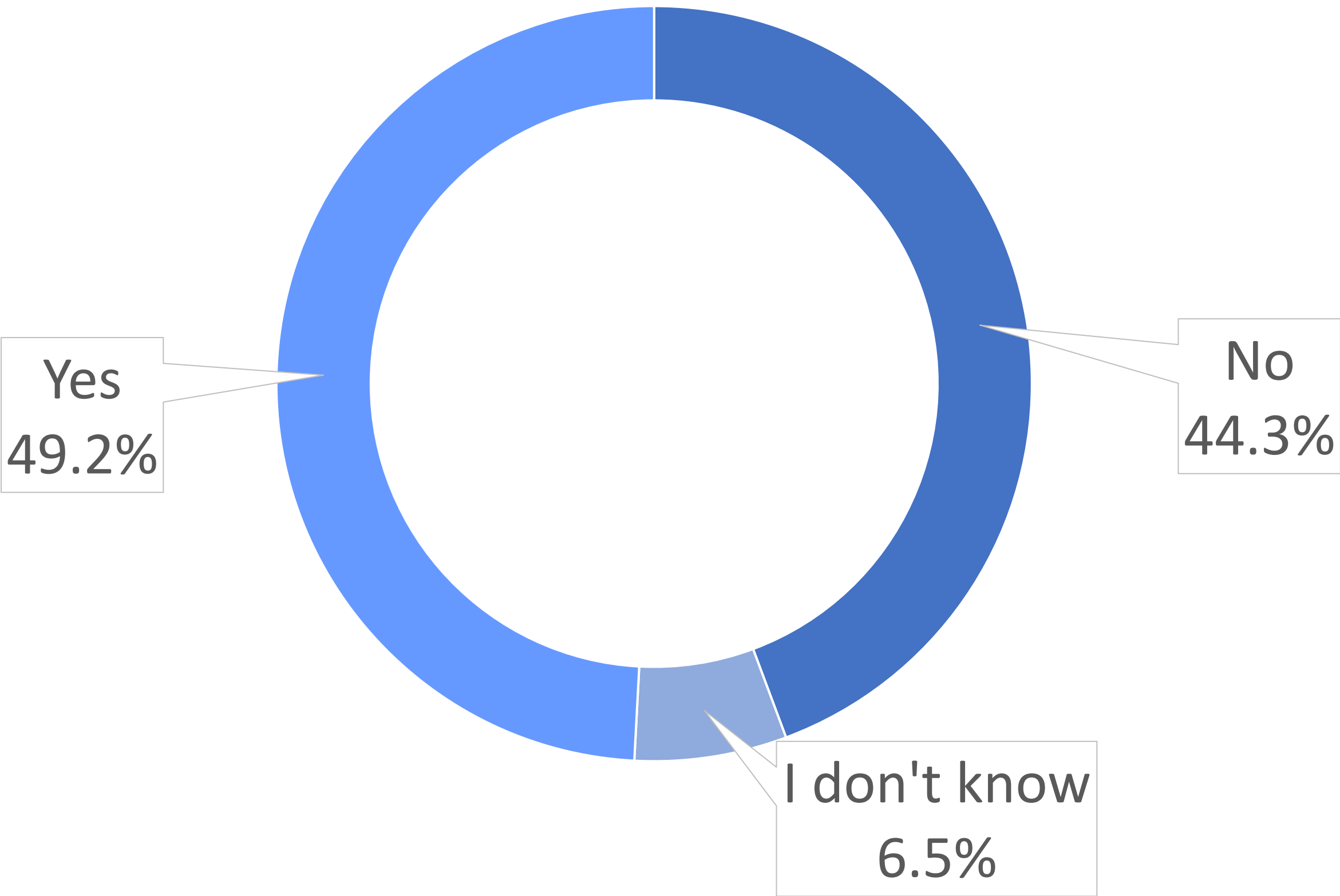
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Role of Personal Safety in Destination Selection

Question: Did your personal safety (or that of your travel party) play any role in **SELECTING THE DESTINATION(S) YOU WILL VISIT** on this next leisure trip?

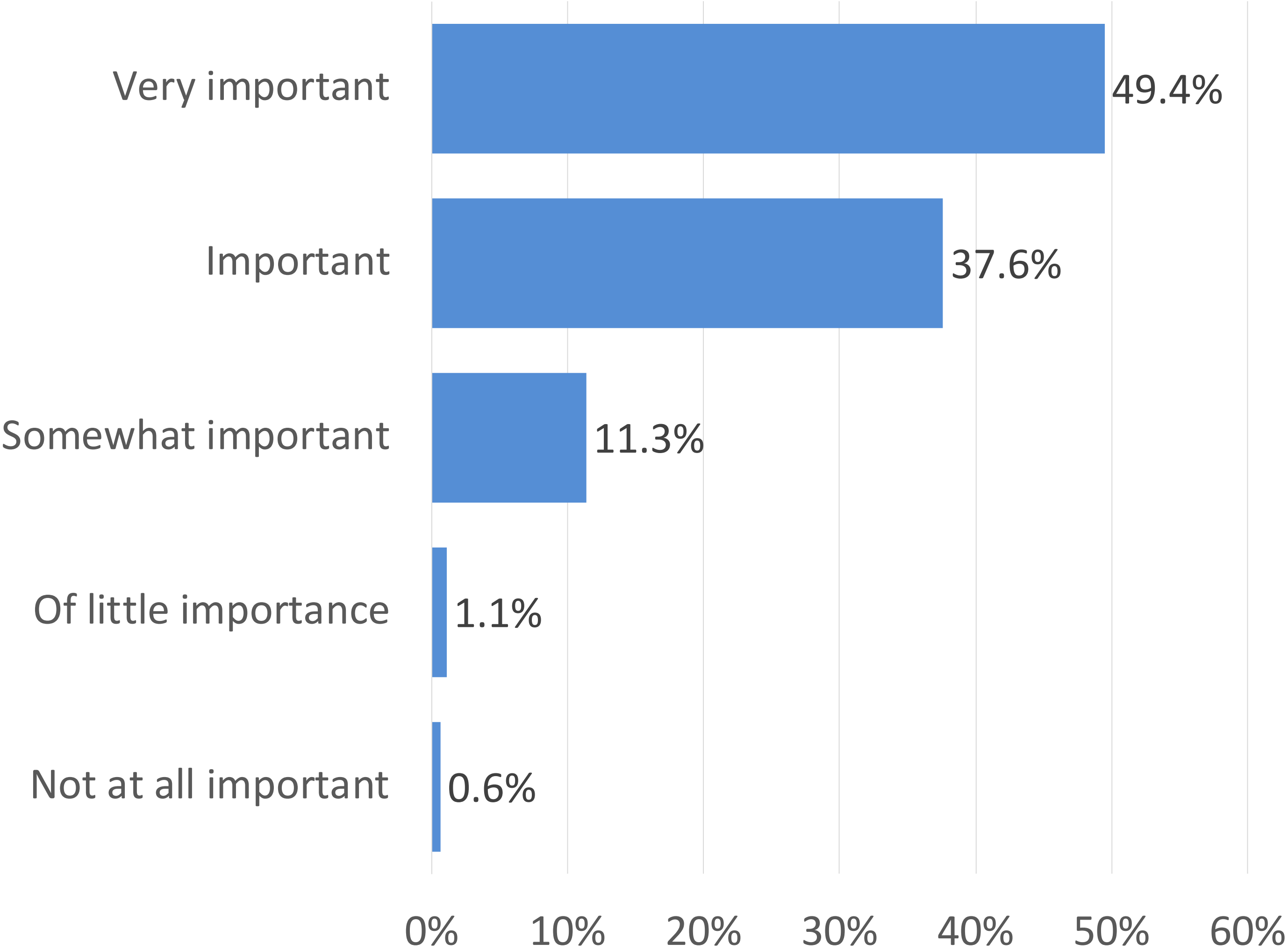
(Base: Respondents with a trip at least tentatively planned in 202, 853 completed surveys. Data collected June 5-7, 2020)



Importance of Personal Safety in Destination Selection

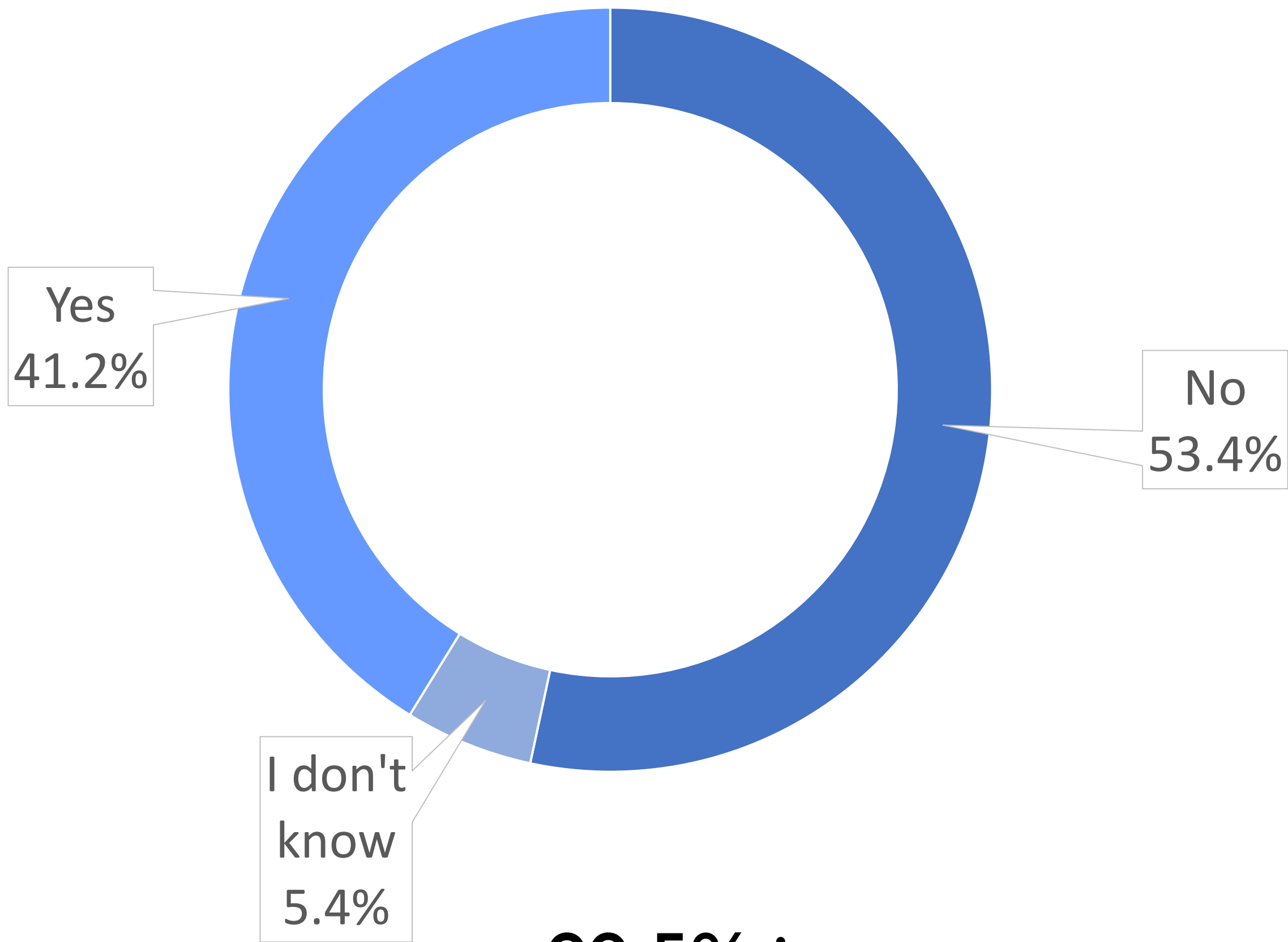
Question: How important was your personal safety (or that of your travel party) in **SELECTING THE DESTINATION(S) YOU WILL VISIT** on this next leisure trip?

(Base: Respondents saying personal safety played a role in destination selection, 418 completed surveys. Data collected June 5-7, 2020)



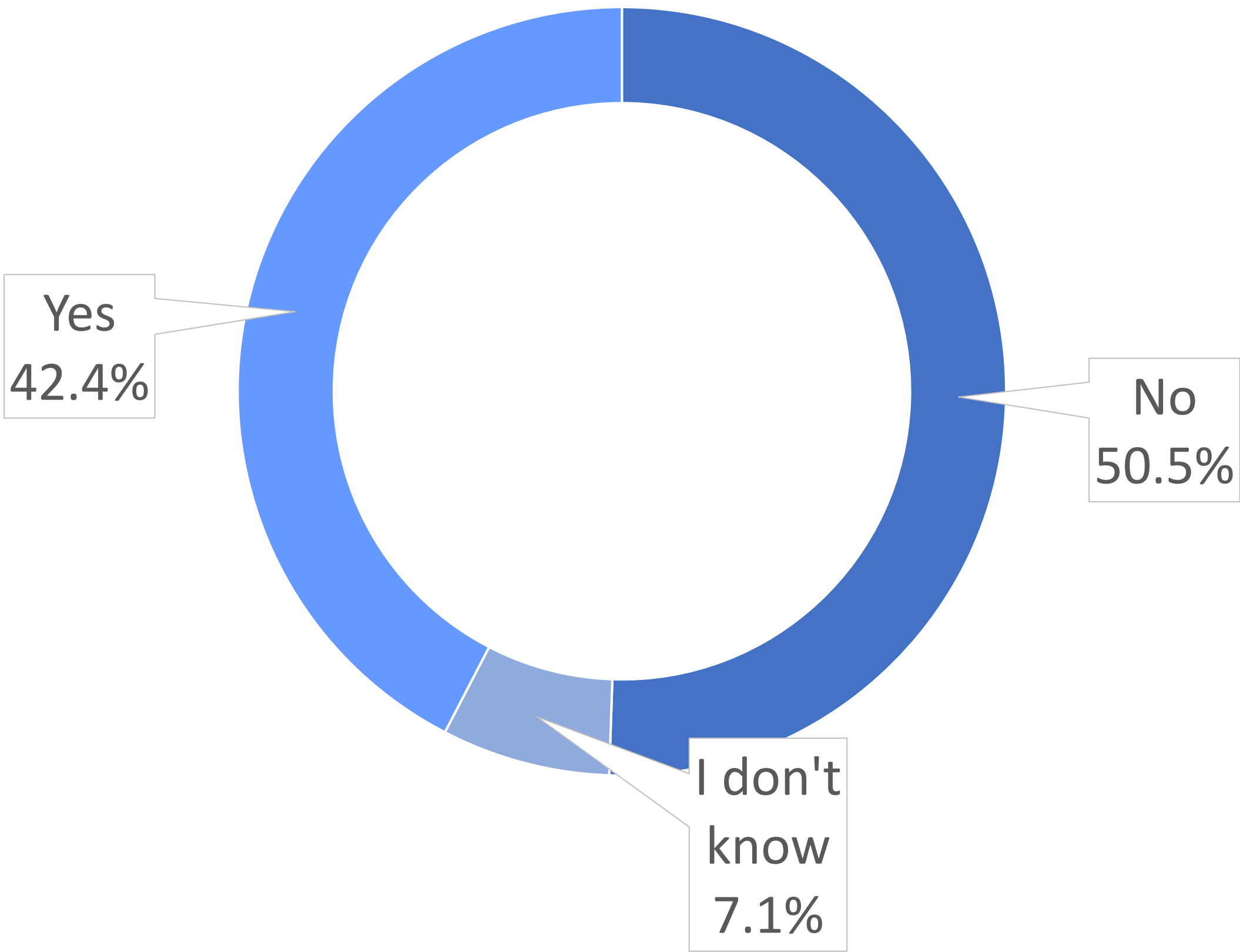
Role of Personal Safety in Transportation Mode Selection

Question: Did your personal safety (or that of your travel party) play any role in selecting the **MODES OF TRANSPORTATION** you will use on this next leisure trip?



89.5% important

Question: Did your personal safety (or that of your travel party) play any role in selecting the **ACCOMMODATIONS** you will use on this next leisure trip?

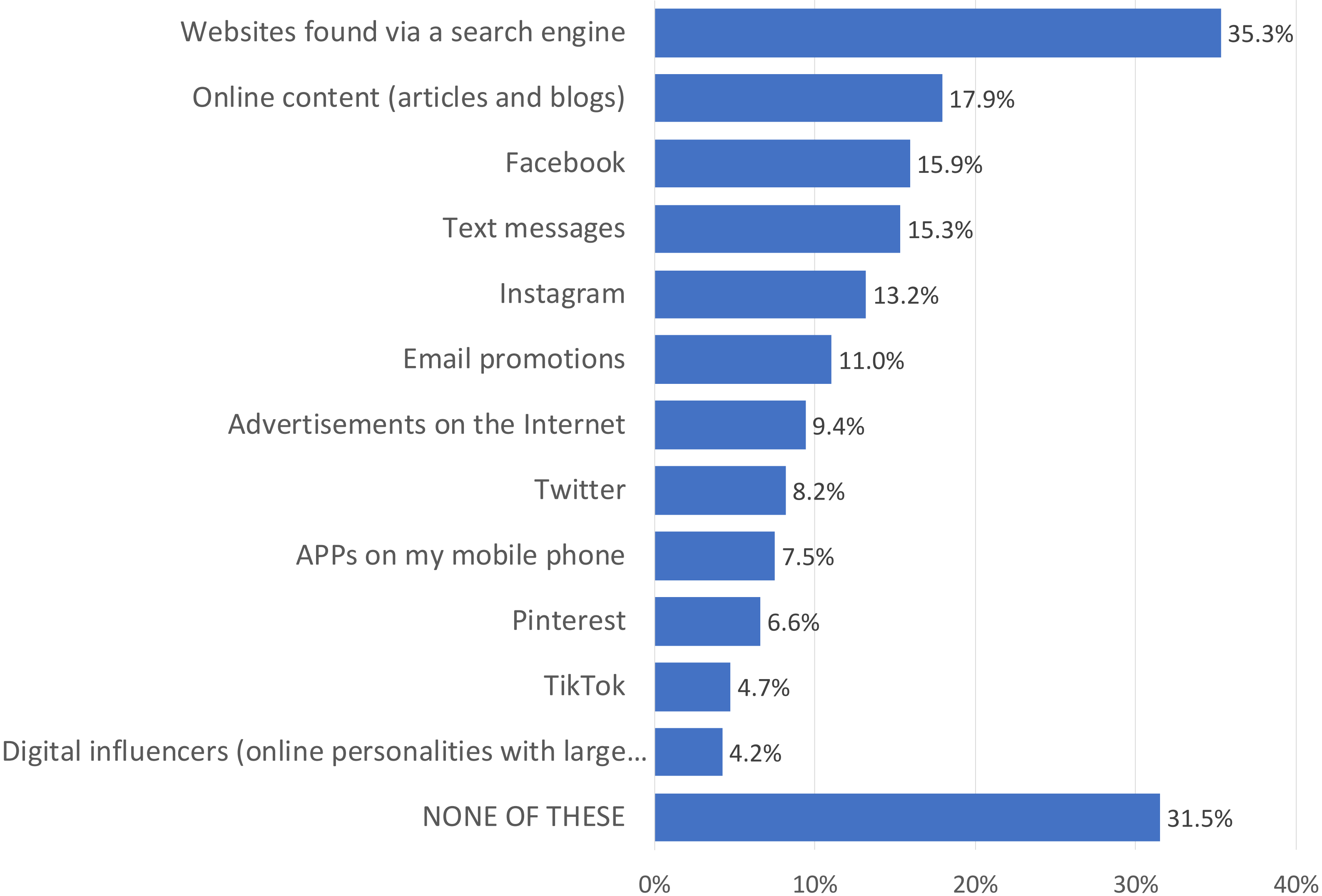


89.0% important

Planning Resources Used

Question: Please think about the planning you have done (or will do) for this upcoming trip. Which of these have you used (or will you use) to gather information for this trip? (Please select all that apply)

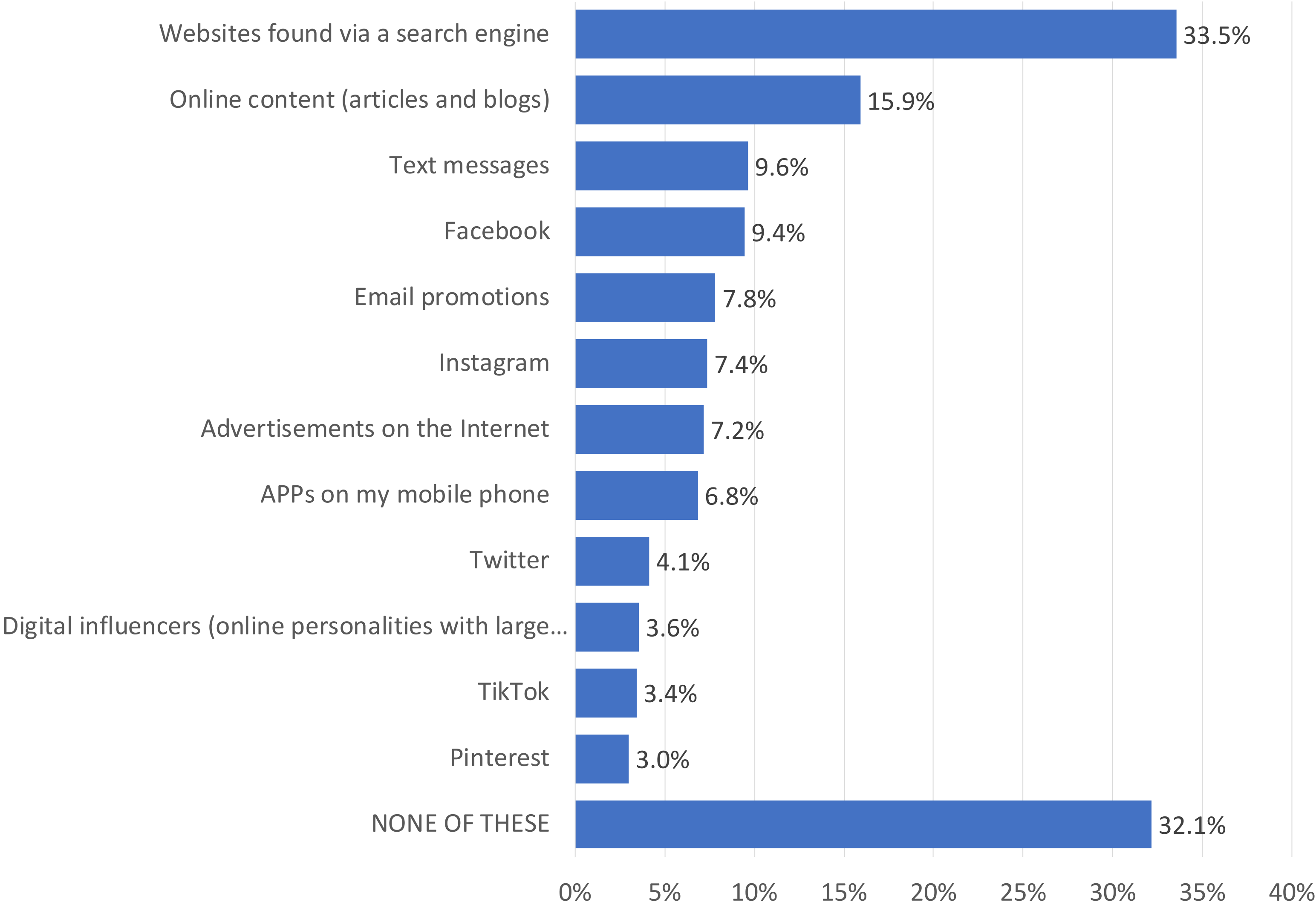
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



Most Important Planning Resources

Question: Which do you expect to be **MOST IMPORTANT** in your travel planning? (Select as many as three)

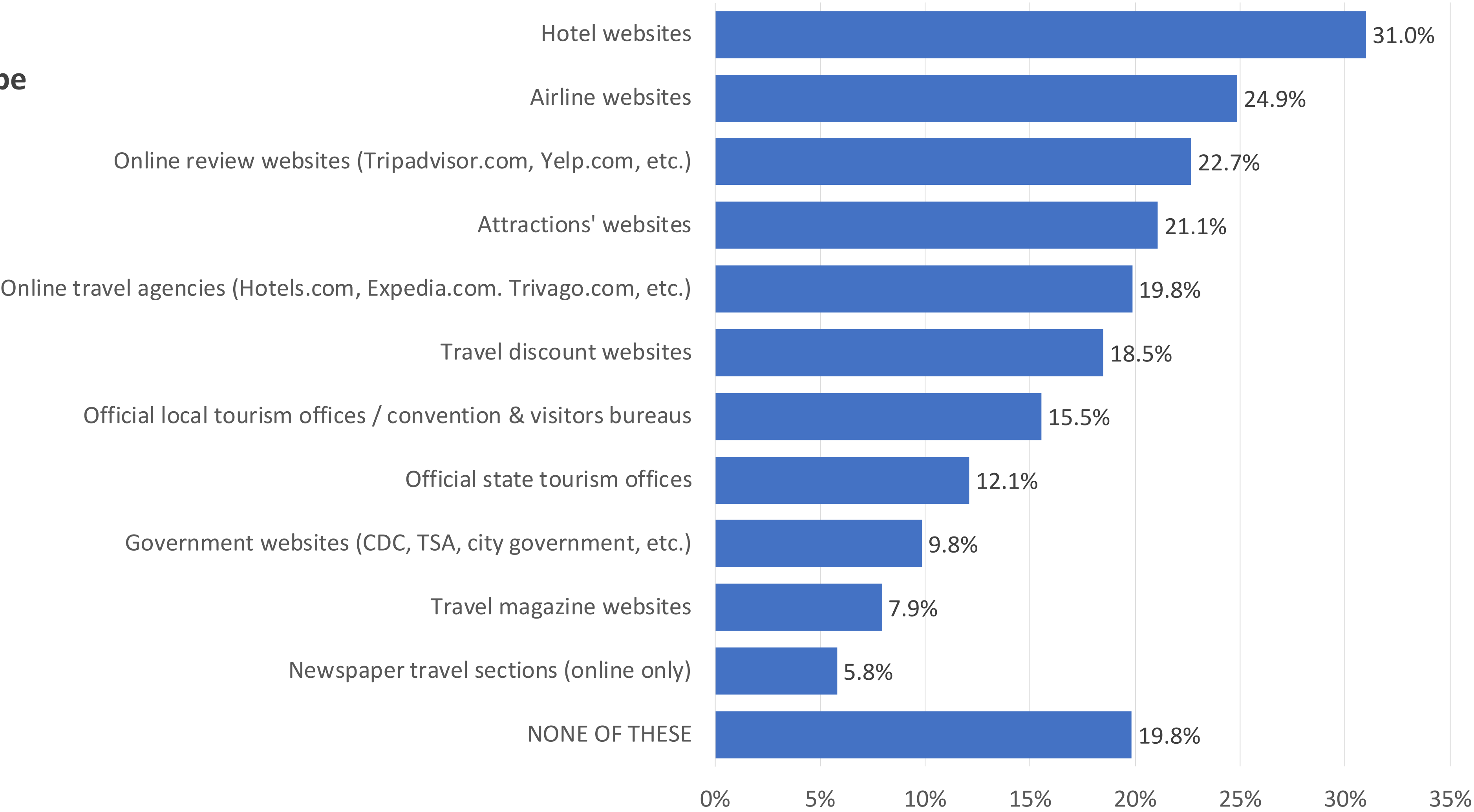
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



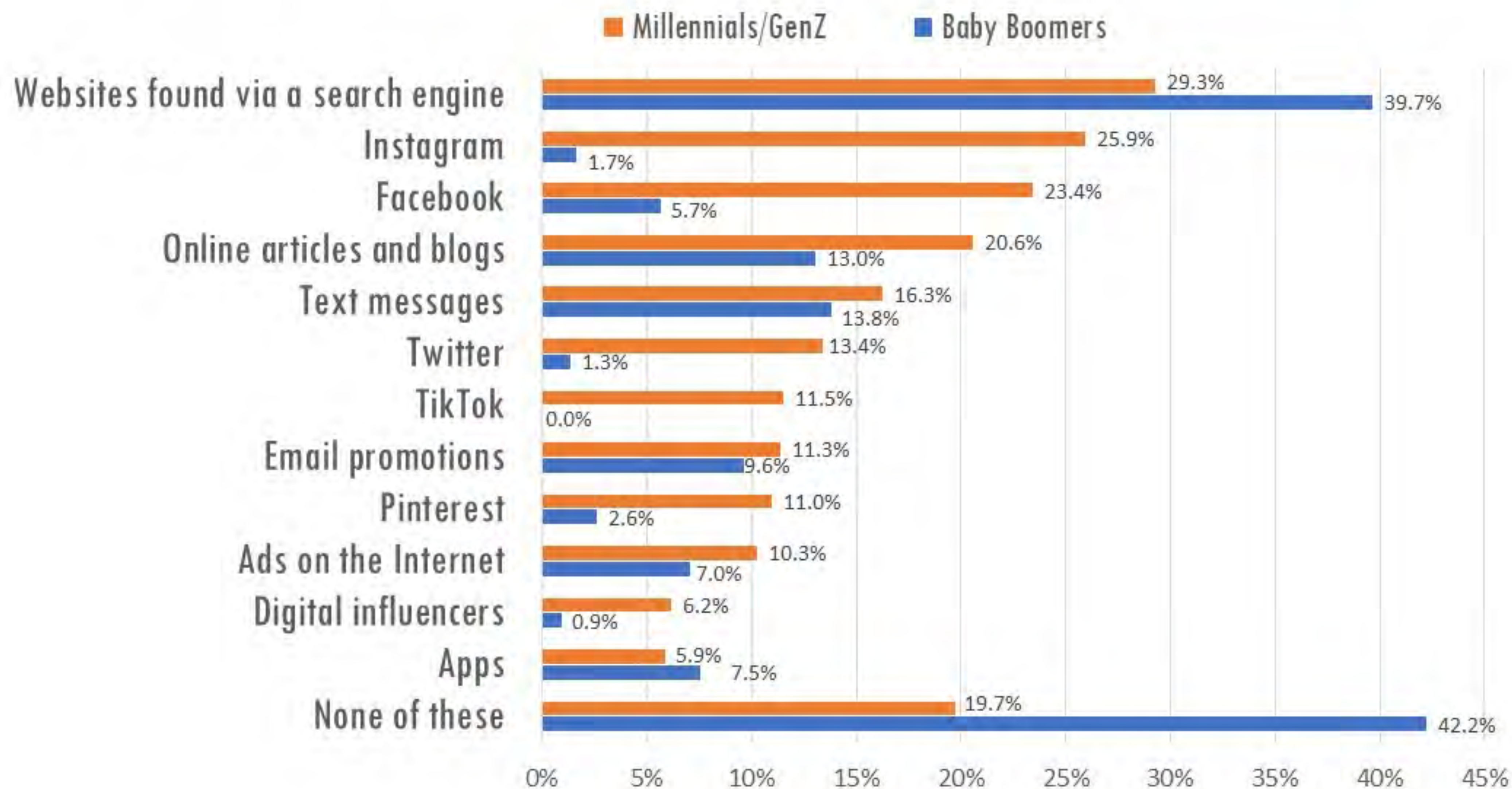
Online Resources Used

Question: Which of these **ONLINE RESOURCES** will you be likely to use to plan this trip?

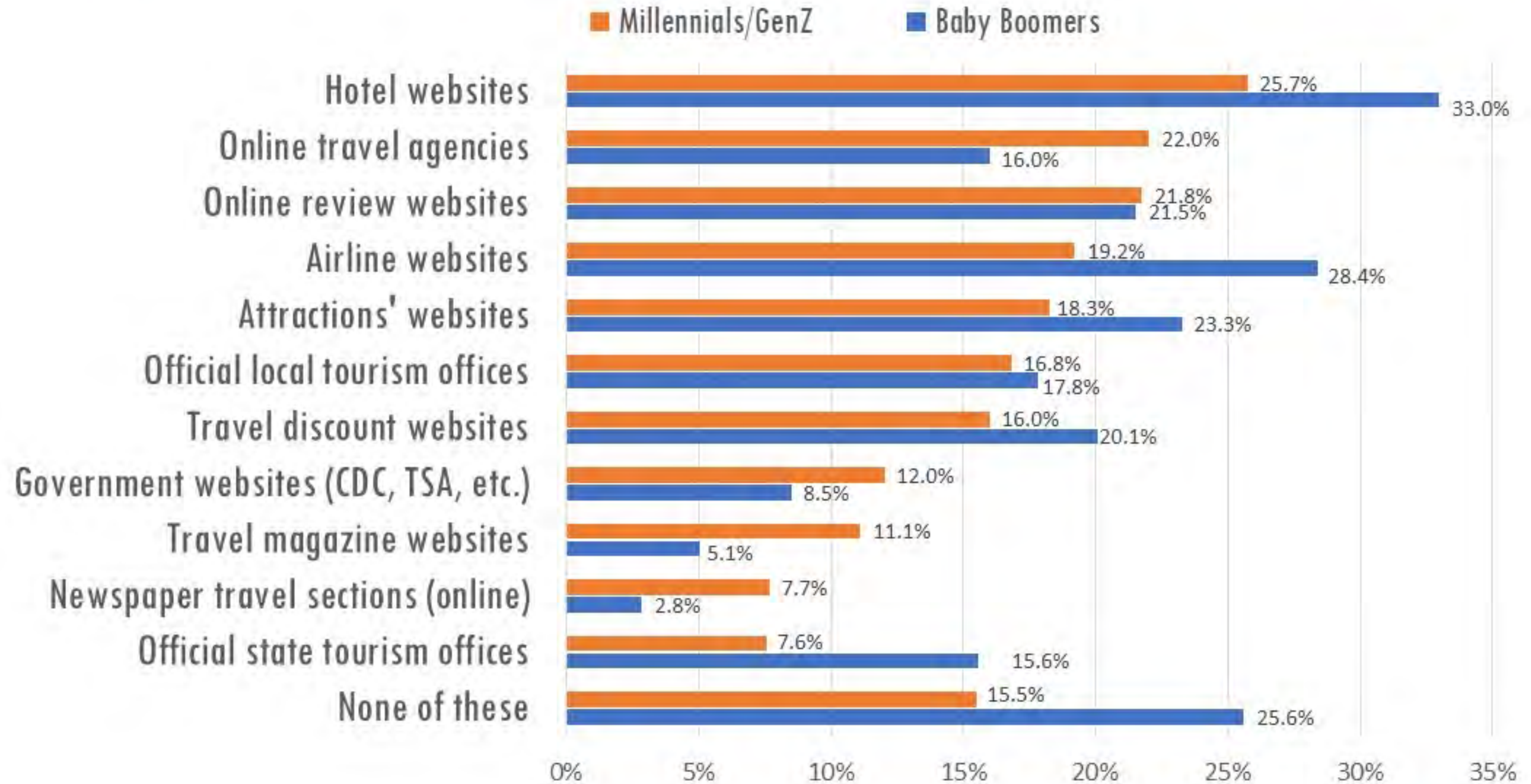
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



MEANS OF TRAVEL RESEARCH FOR NEXT LEISURE TRIP



ONLINE TRIP PLANNING RESOURCES FOR NEXT LEISURE TRIP



KEY TAKEAWAYS

- **Most “next” trips expected this year have moved beyond the dreaming phase, with many travelers having their trip concepts substantially developed. Still, room for influence exists**
- **Personal safety considerations loom large, and will greatly impact destination selection, lodging choice and modes of transportation used**
- **American travelers continue to opt for beach, and outdoor type experiences for their next leisure trips**
- **Travel-related websites and social media will likely be the focus of travel decision-making in the coming months**



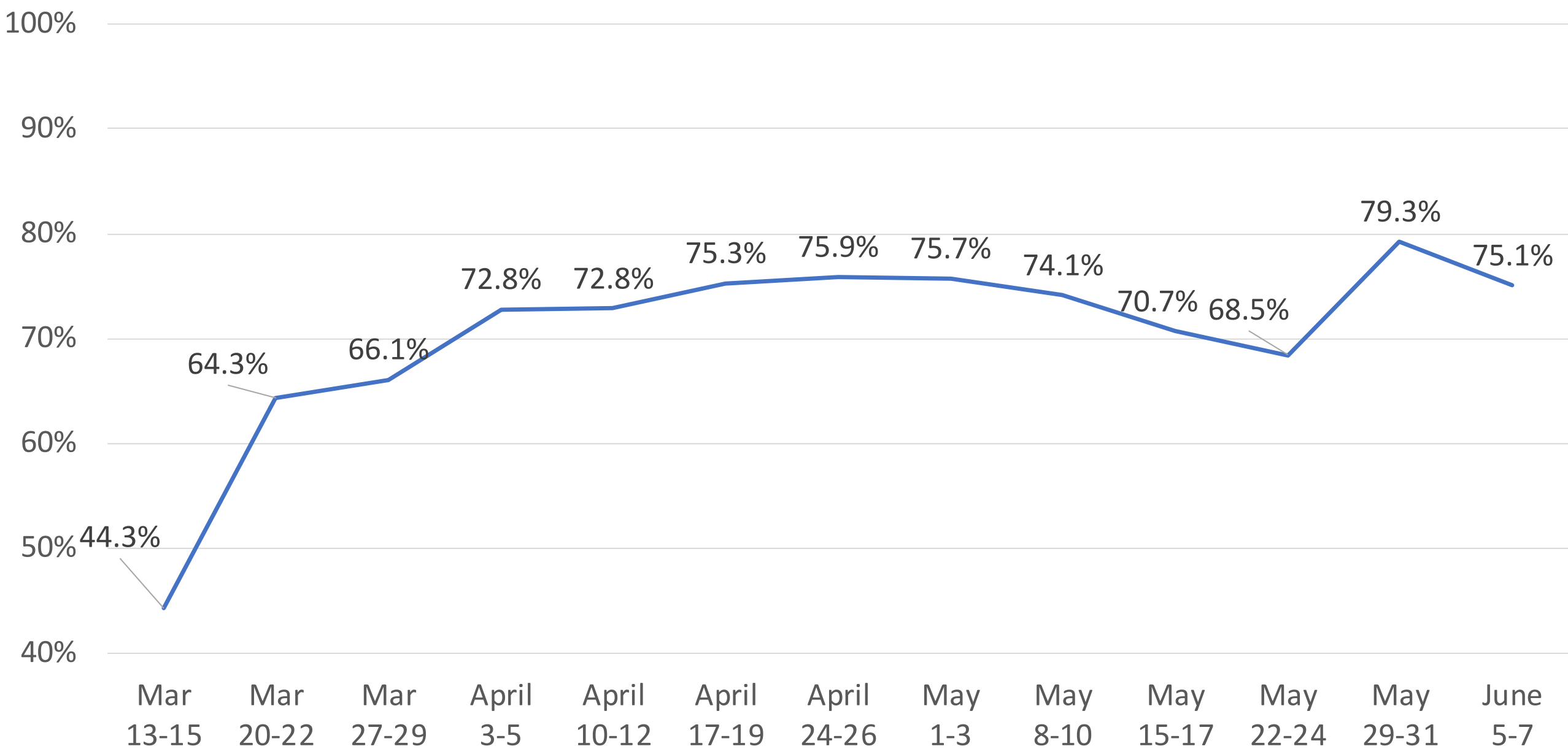
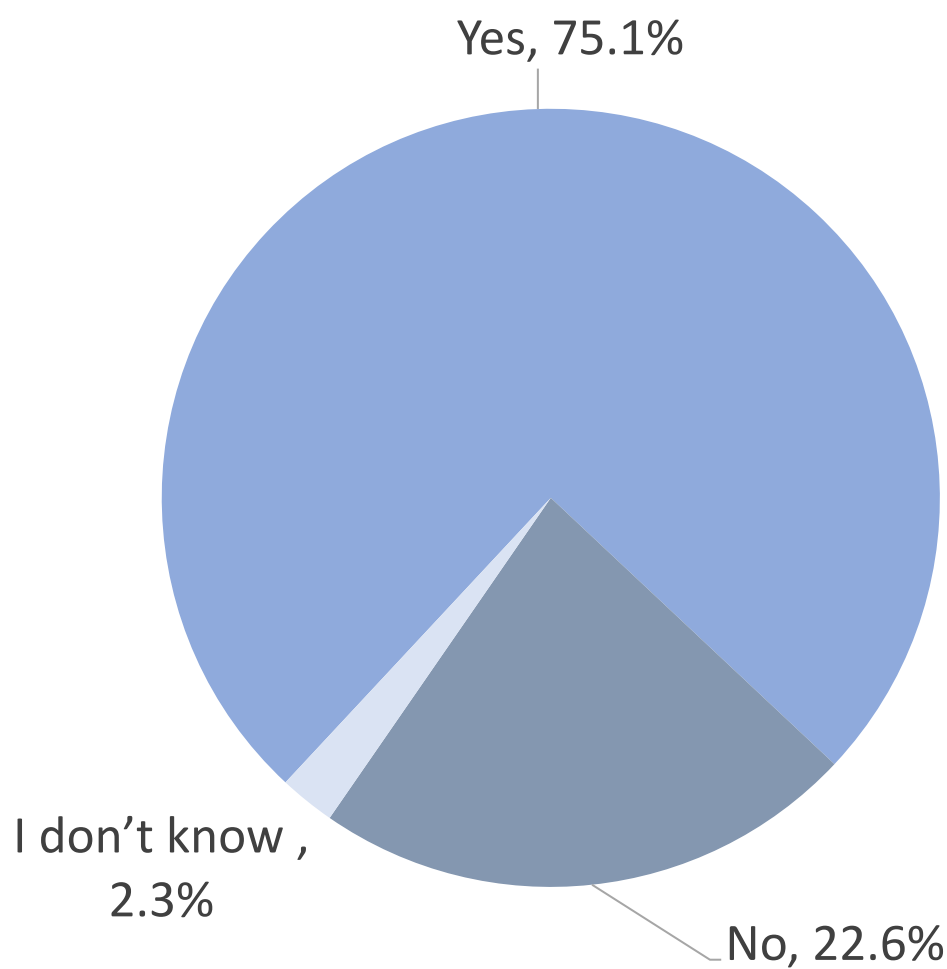


The Continuing Impact of the Pandemic

Impact of the Coronavirus on Travel

Question: Has the current coronavirus situation affected your travel in any way? (Please consider all your travel--leisure, business, group meeting, etc.)

Wave 13 (June 5-7)

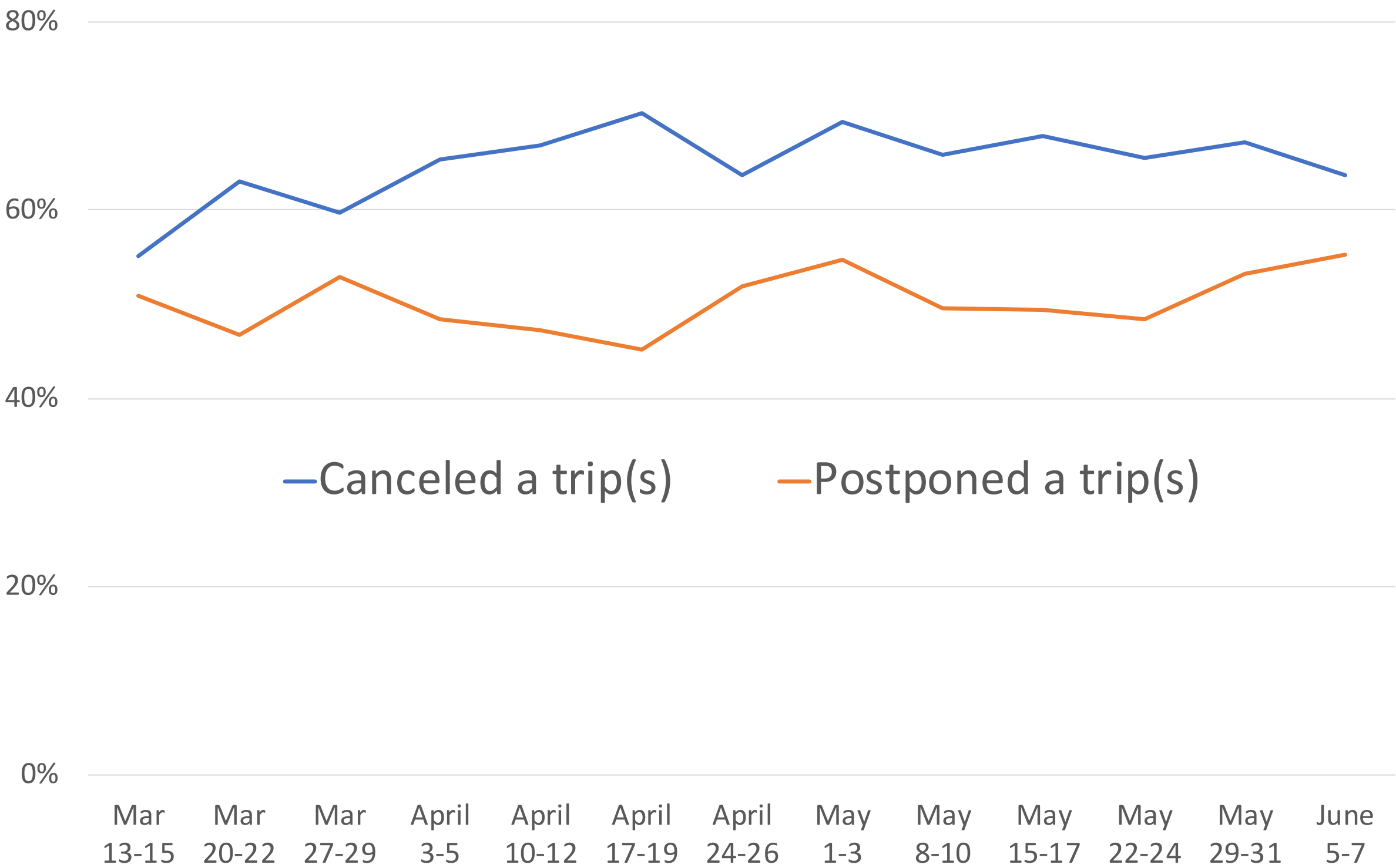


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 ,1,257 and 1,214 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31 and June 5-7, 2020)

How the Coronavirus has Impacted Travel

Question: How has the coronavirus situation affected your travel? (Select all that apply)

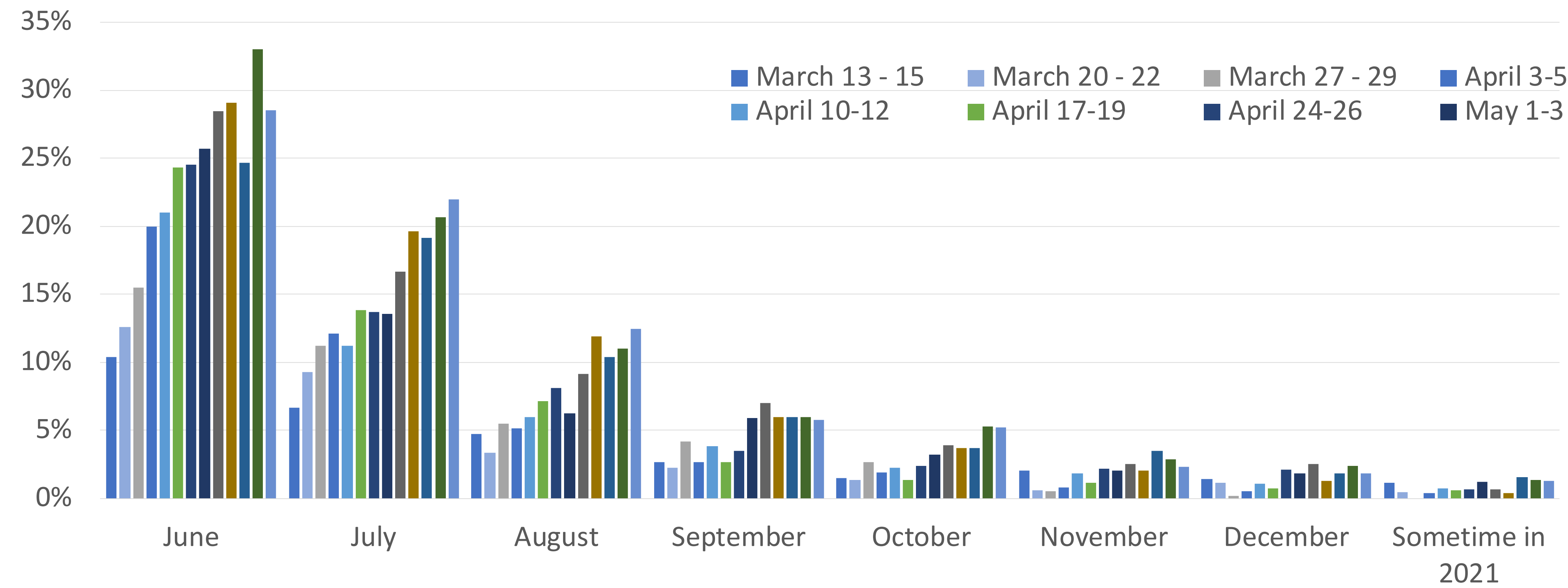
Due to the coronavirus situation, I have_____.



(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 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 and June 5-7, 2020)

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 and 616 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 and June 7-9, 2020. Note: Data purposefully excluded from this chart for readability.)

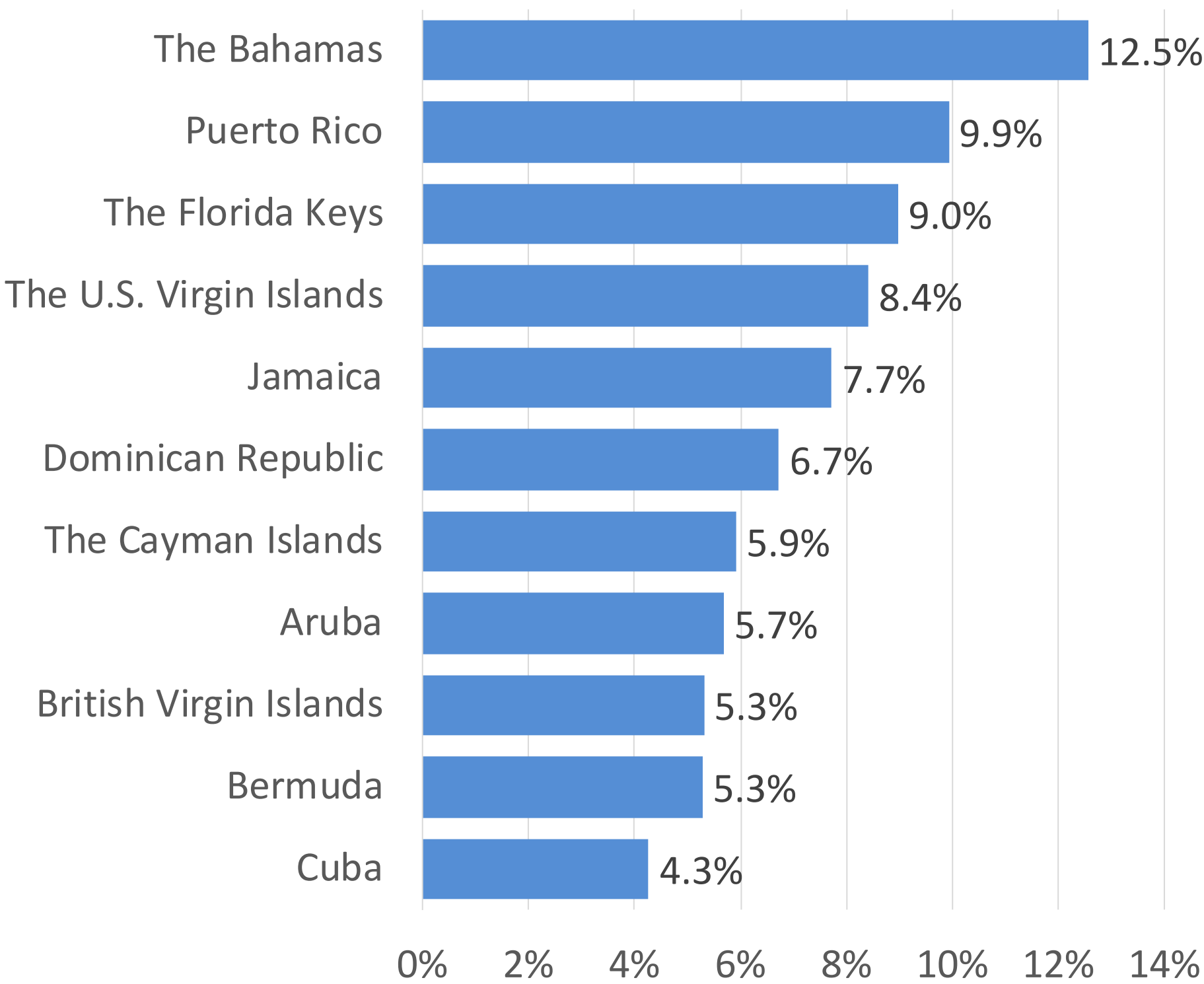
A vibrant tropical beach scene. In the foreground, several tall palm trees with green and yellow fronds stand on a sandy beach. The middle ground shows a clear turquoise ocean with white waves breaking on the shore. In the background, there are white lounge chairs on the sand, a small dog, and a person lying down. A modern building is visible in the far distance under a clear blue sky.

Health Screenings in Paradise

Would mandatory pre-trip screenings be a deal breaker for travelers?

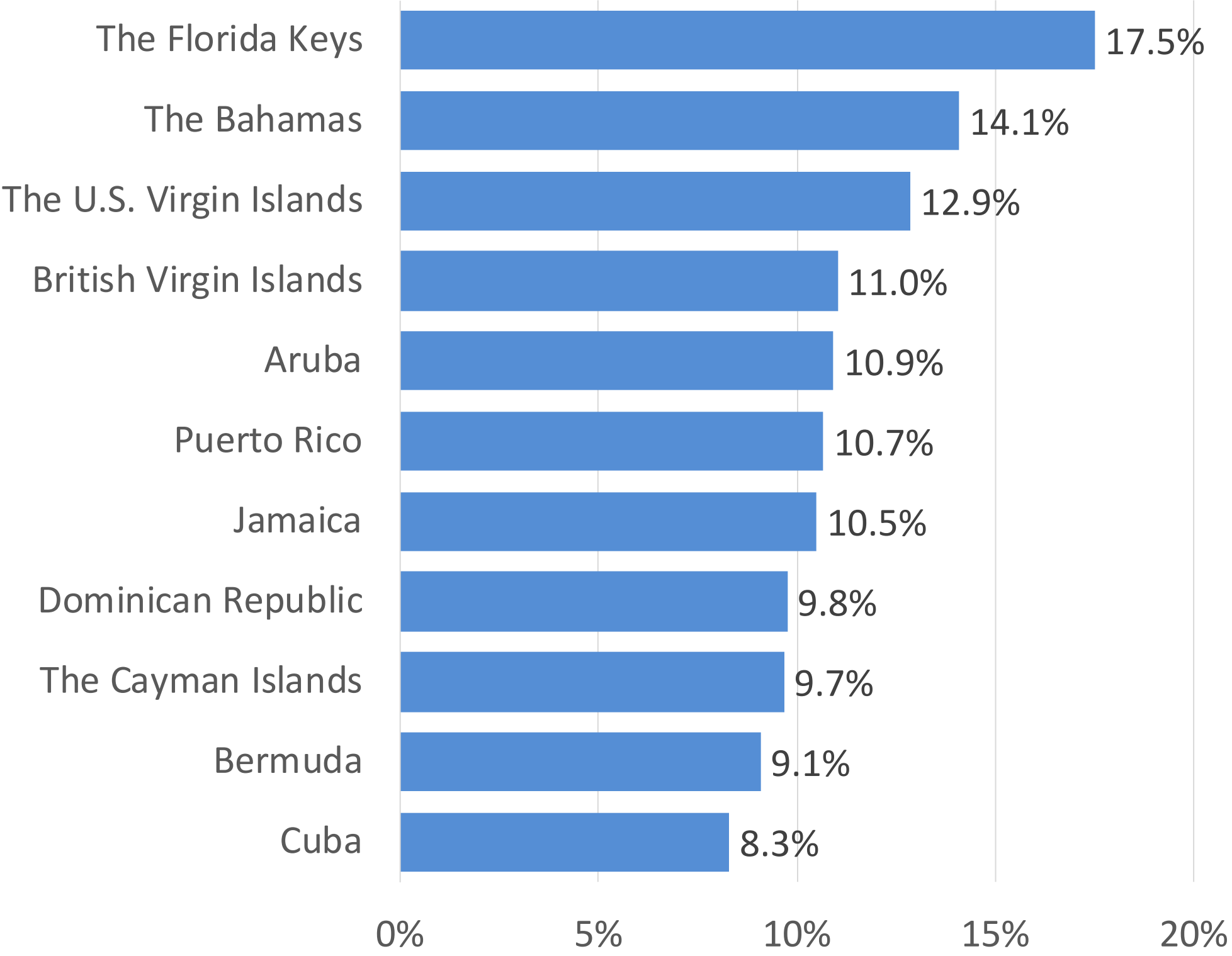
Past and Likely Future Visitation: Selected Islands

Past 3 Years



Question: Which of these islands have you visited (or traveled within) in the PAST THREE (3) YEARS?

Next 3 Years



Question: Which of these islands will you be likely to visit (or travel within) in the NEXT THREE (3) YEARS?

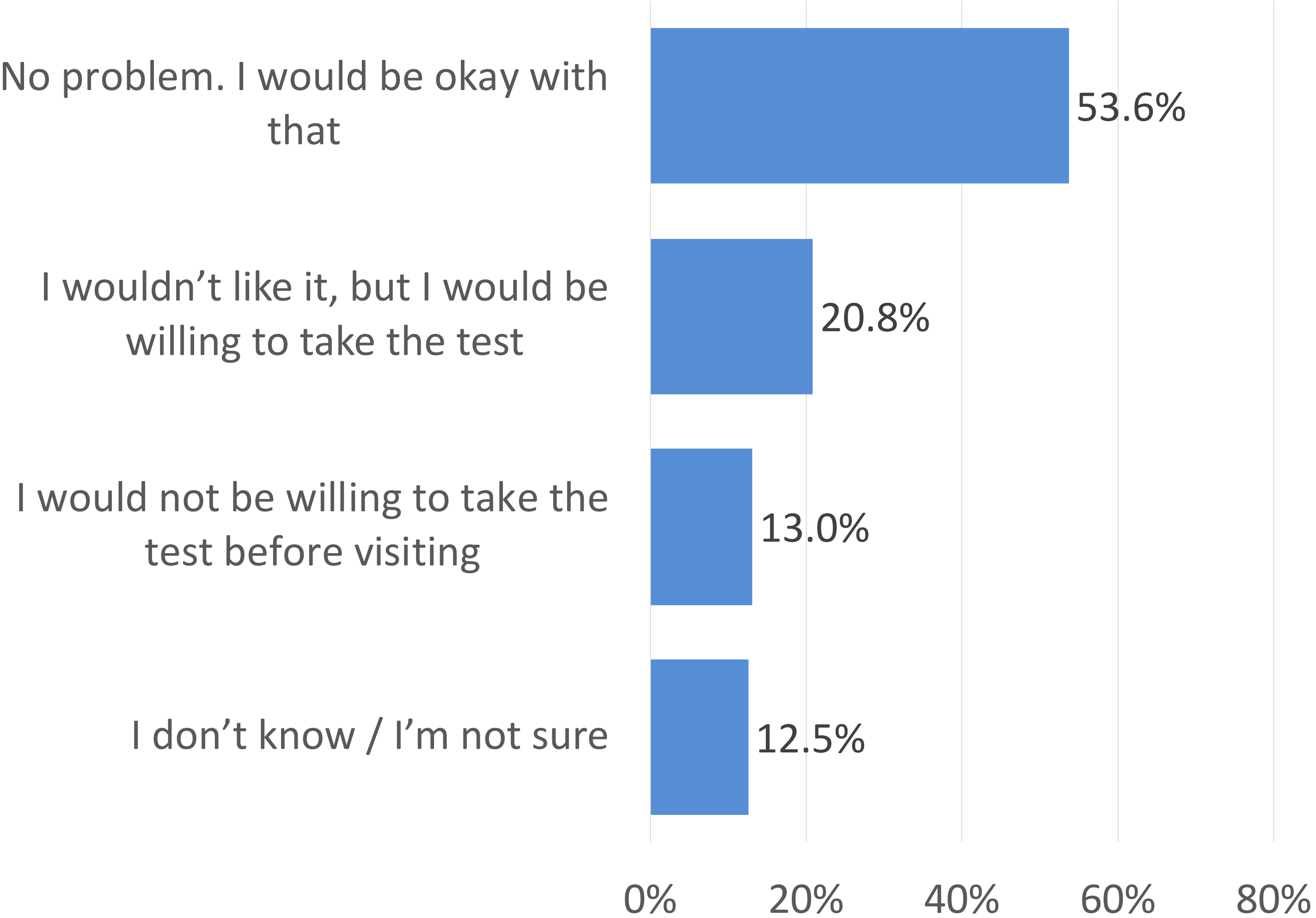
(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)

If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, as a traveler how would you feel? (Select the one that best describes you)

- ☐ No problem. I would be okay with that
- ☐ I wouldn't like it, but I would be willing to take the test
- ☐ I would not be willing to take the test before visiting
- ☐ I don't know / I'm not sure

Feelings about Pre-trip Testing

Question: If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, as a traveler how would you feel? (Select the one that best describes you)

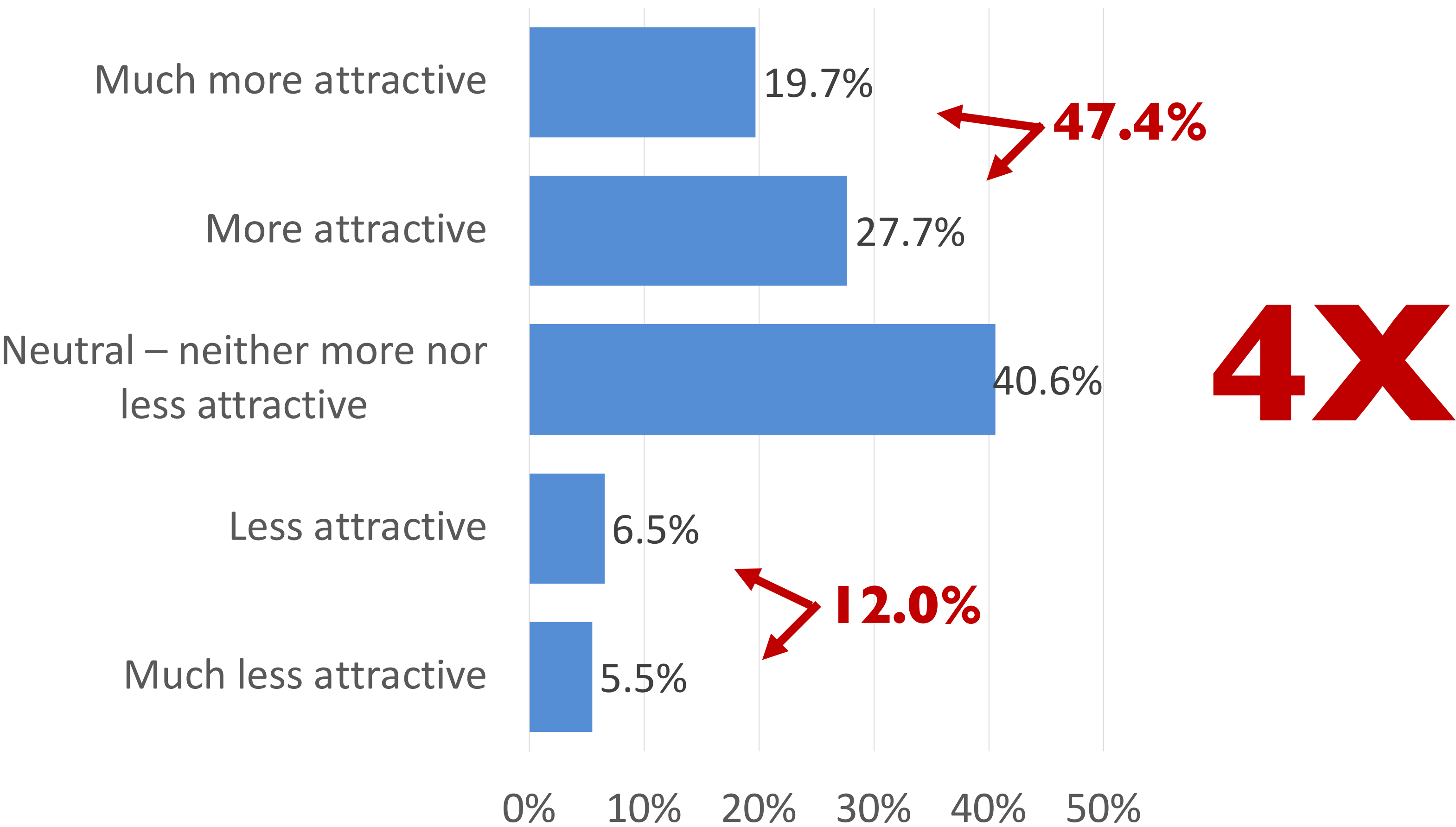


(Base: All respondents, 1.214 completed surveys. Data collected June 5-7, 2020)

Impact on Destination Appeal

Question: If one of the islands mentioned above required visitors to have a Coronavirus test 2-4 days prior to visiting, would that make the island a **MORE OR LESS ATTRACTIVE** place to visit? (Select one to fill in the blank)

This requirement makes the island _____ as a place to visit



(Base: All respondents, 1.214 completed surveys. Data collected June 5-7, 2020)



KEY TAKEAWAYS

- **The pandemic continues to adversely impact travel**
- **Testing programs will likely have a net positive benefit for island and other destinations**



Coronavirus Travel Sentiment Index

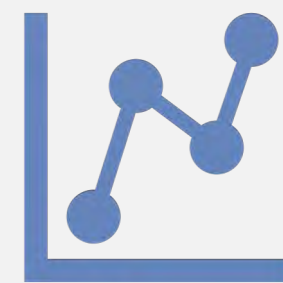
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 1st

What is a Predictive Index?



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



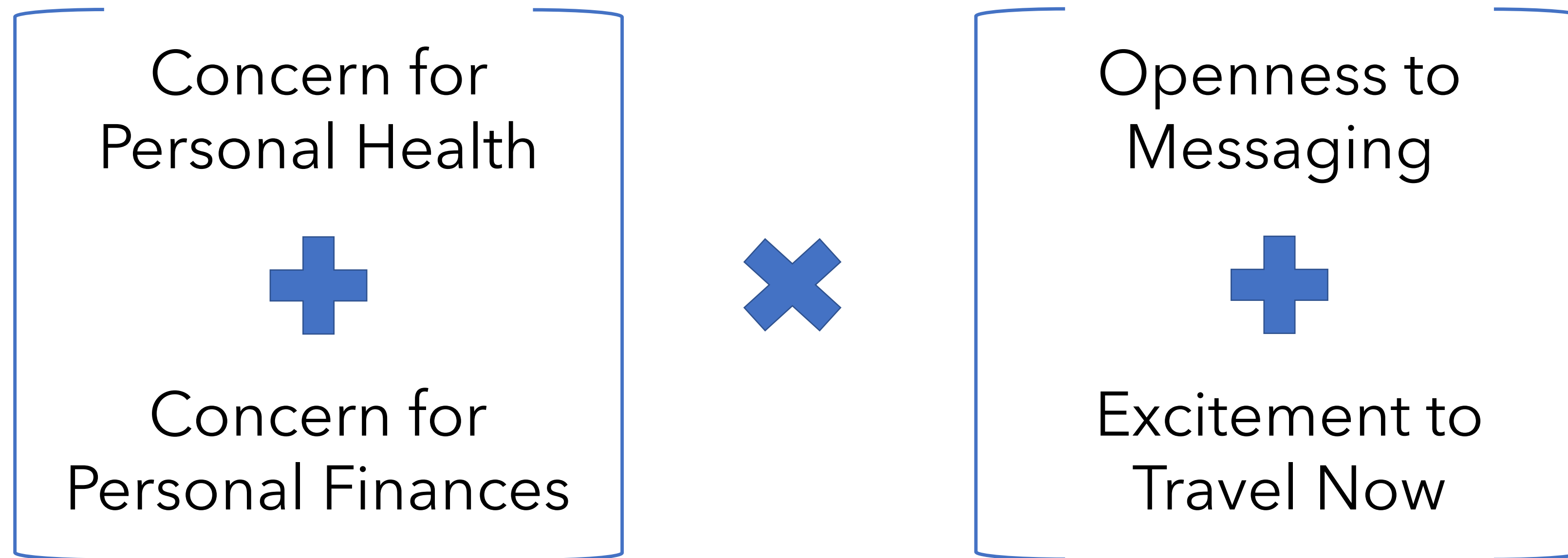
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

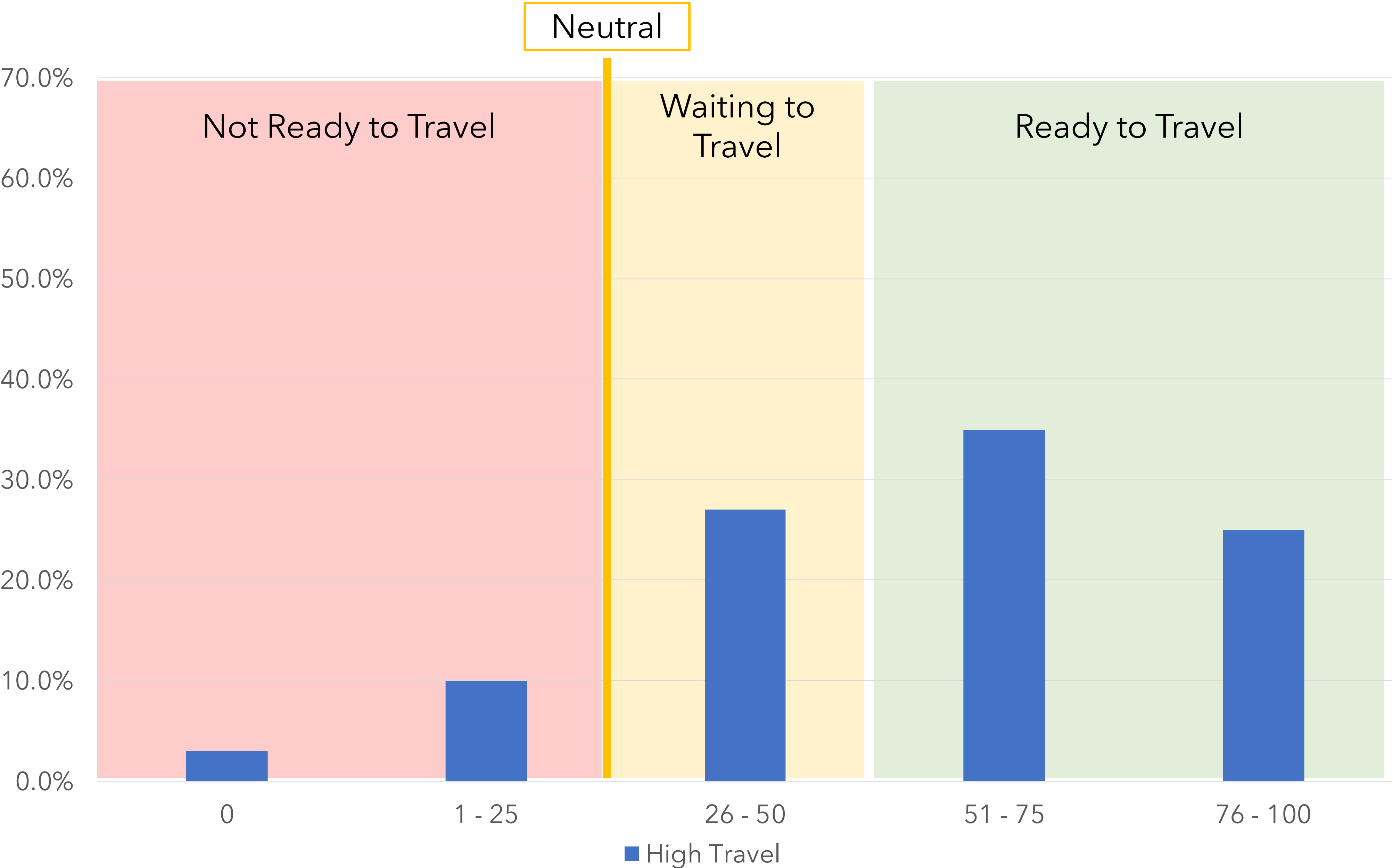
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



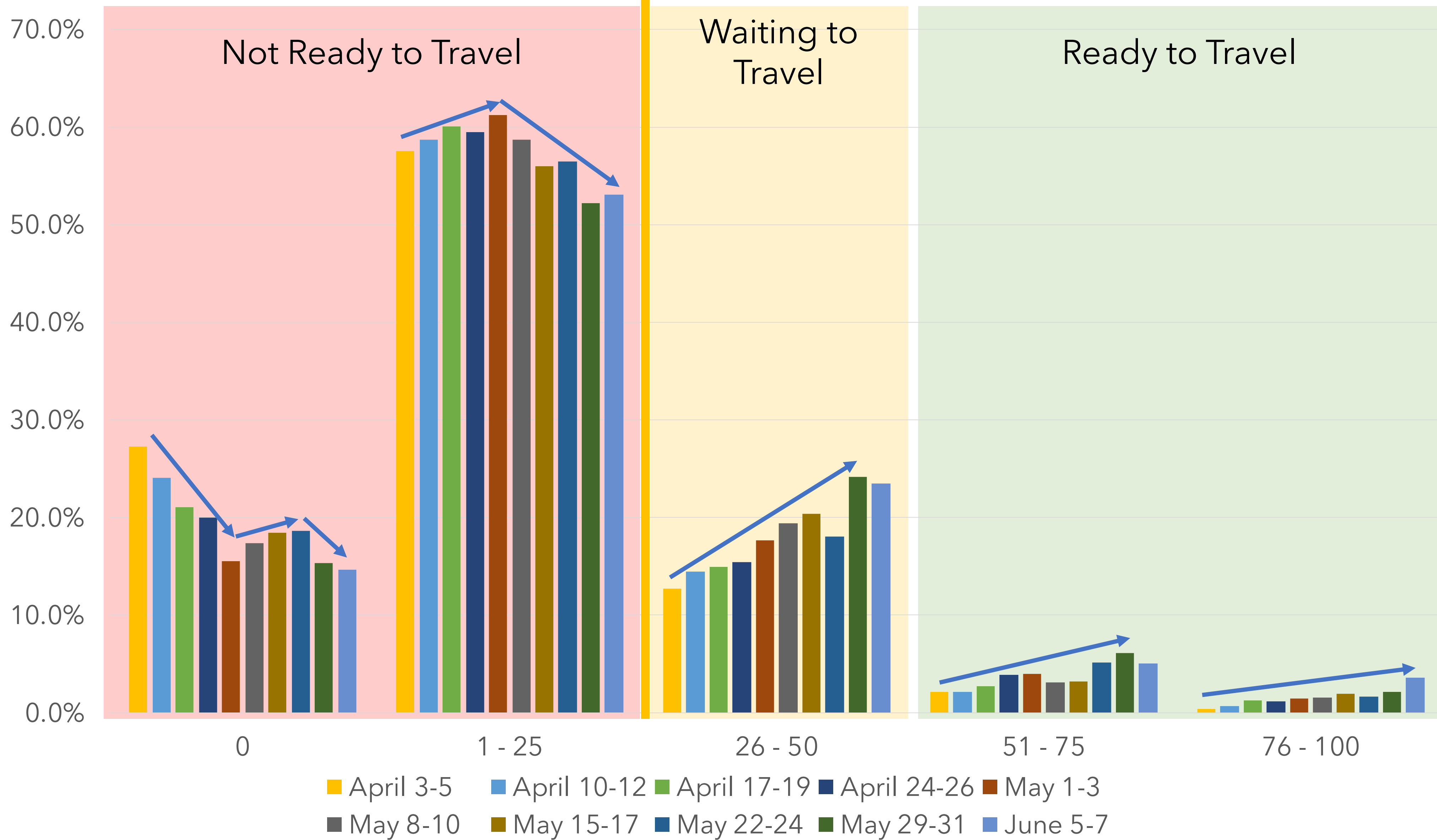
*Normalized to a 100pt scale

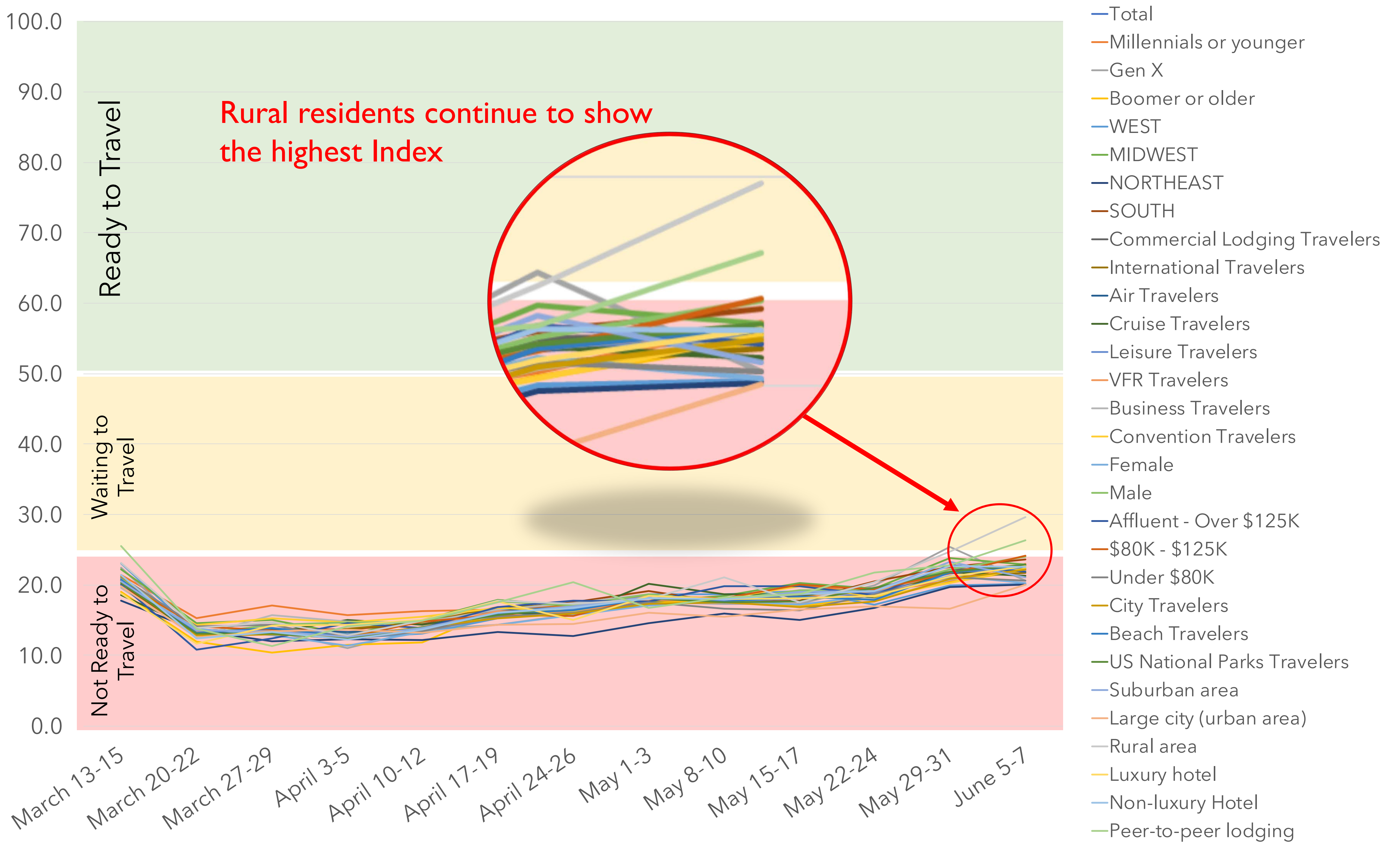
Healthy Travel Outlook



Travel Outlook

Neutral

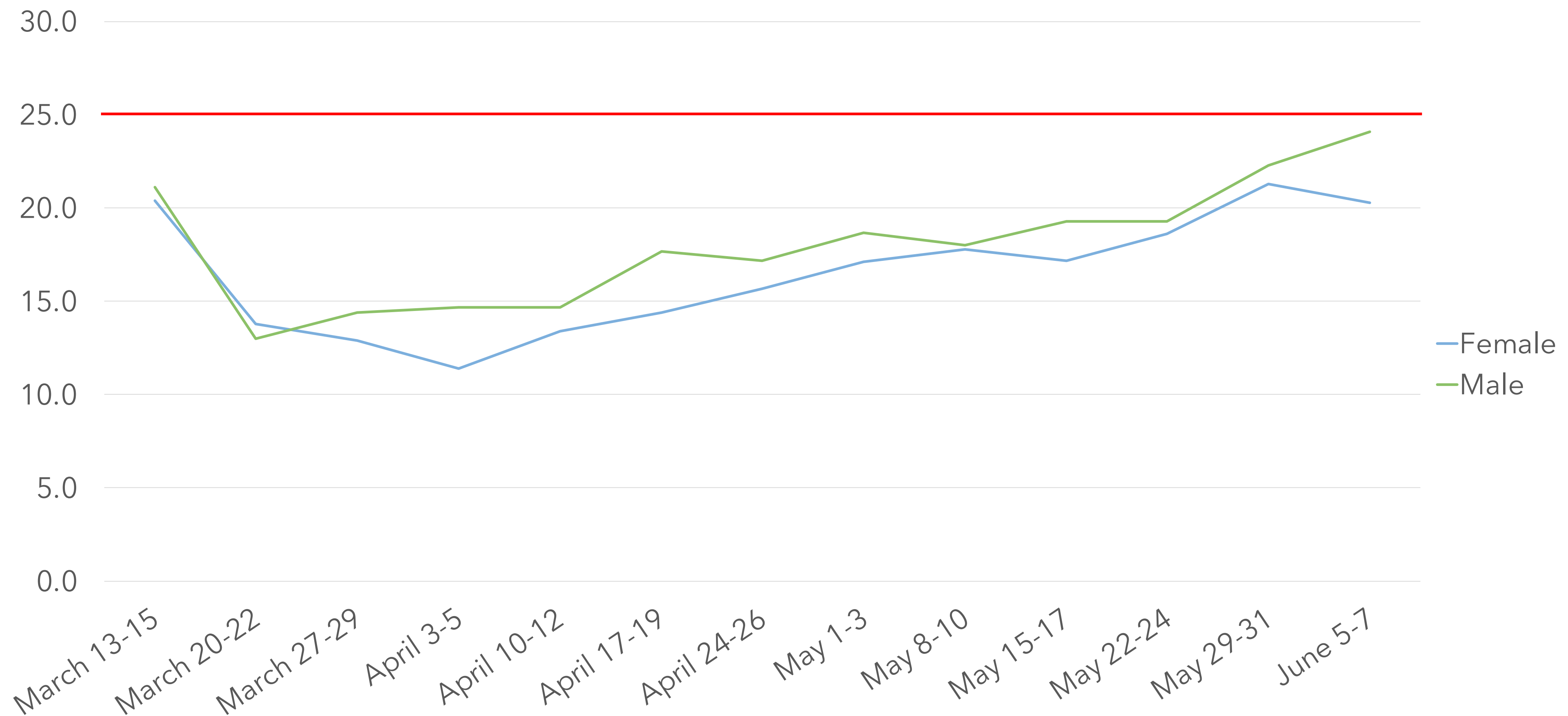




Gender

Points of Interest:

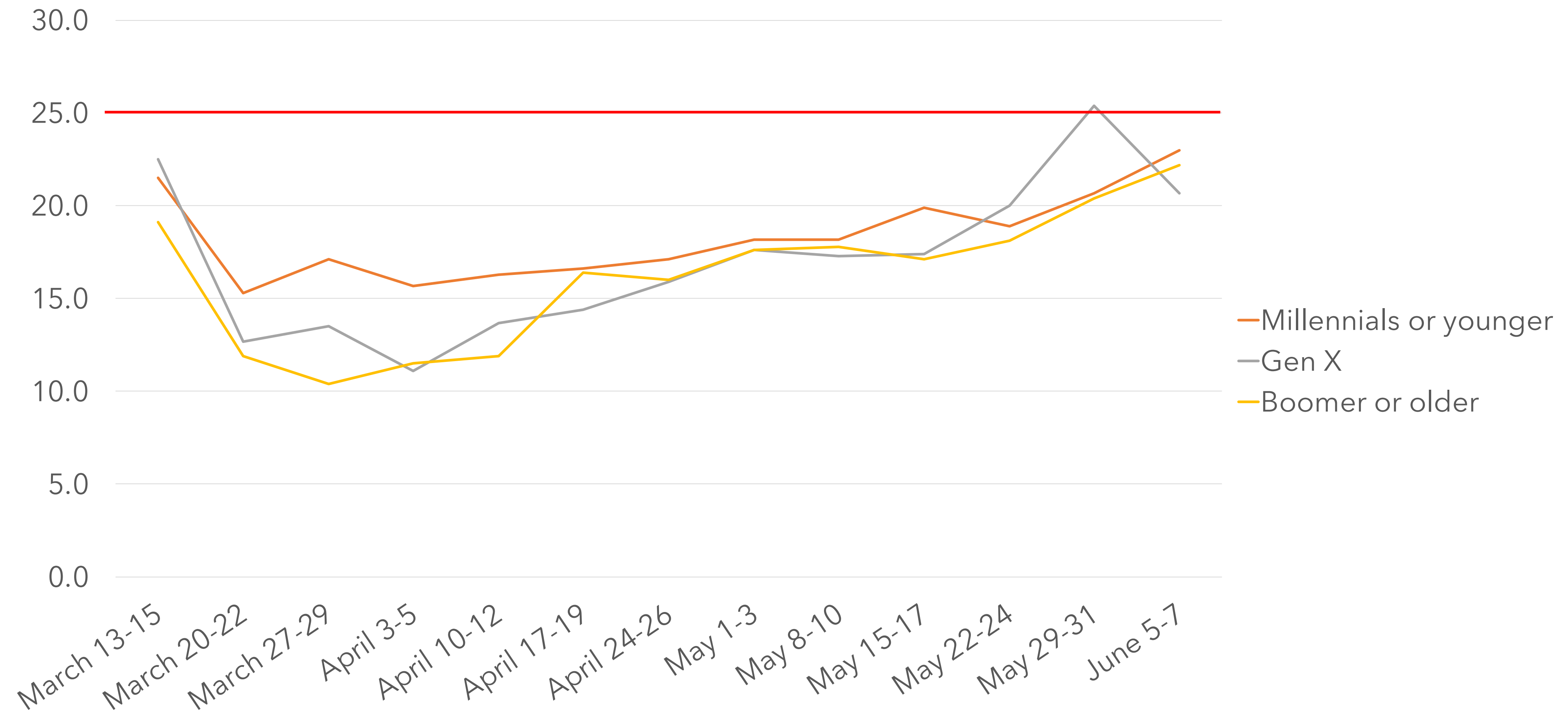
- Safety and financial concerns dropped for Men this week, while concerns for women largely remained consistent with previous weeks.
- Men reported a significant drop in the agreement with the statement, "I'm planning to avoid travel until the Coronavirus situation blows over"



Generation

Points of Interest:

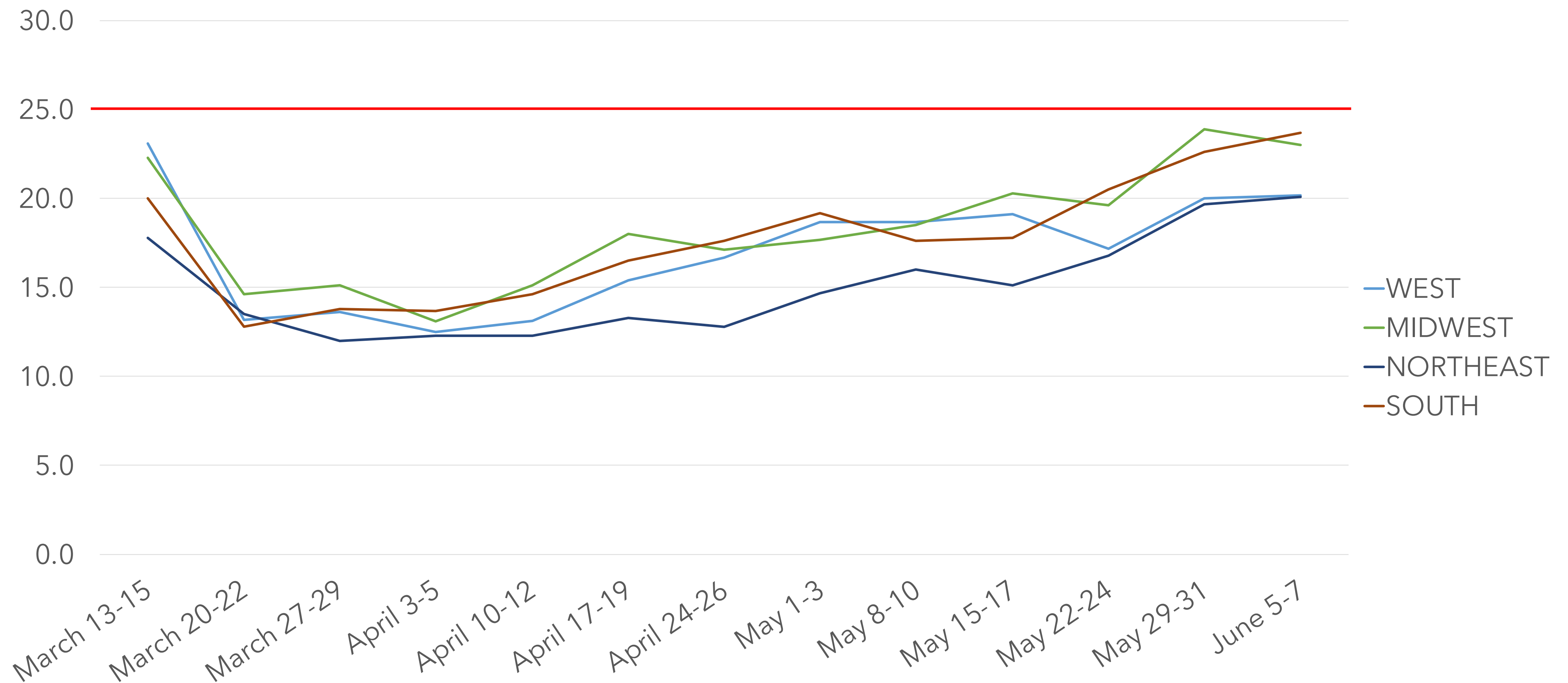
- Gen X safety concerns went back up this week (6.5 out of 10, up from 6.1 last week) while Millennials and Boomers showed modest drops in concern for safety.
- Millennials showed a slight rise in openness to travel messaging while both Gen X and Boomers saw slight drops.



US Region

Points of Interest:

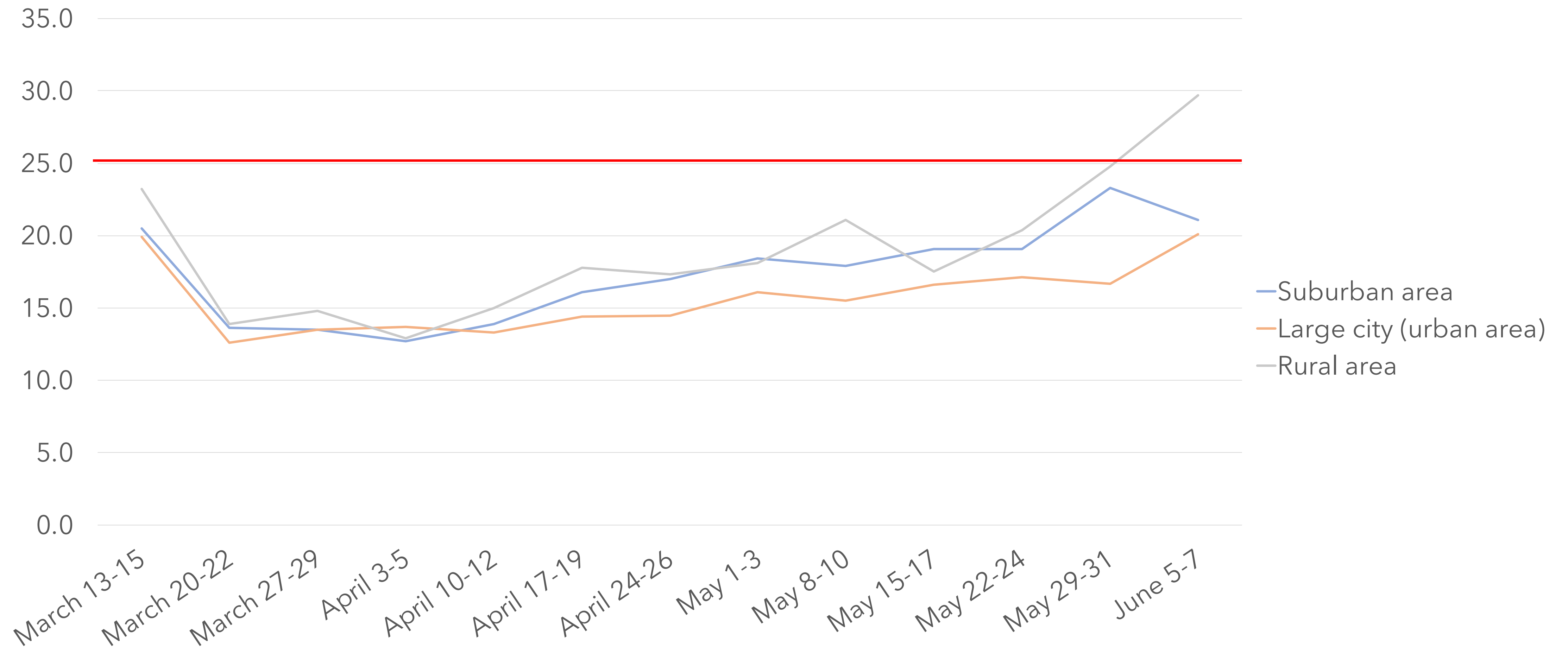
- Safety concerns in all regions except the Midwest showed slight drops this week while financial concerns showed drops most significantly in the South.
- Among all regions the Northeast again showed the most optimism about the coronavirus situation improving in the next month (44.4% up from 34.8% last week think the situation will get better or much better in the next month).



Type Of Residence

Points of Interest Impacting Index Scores:

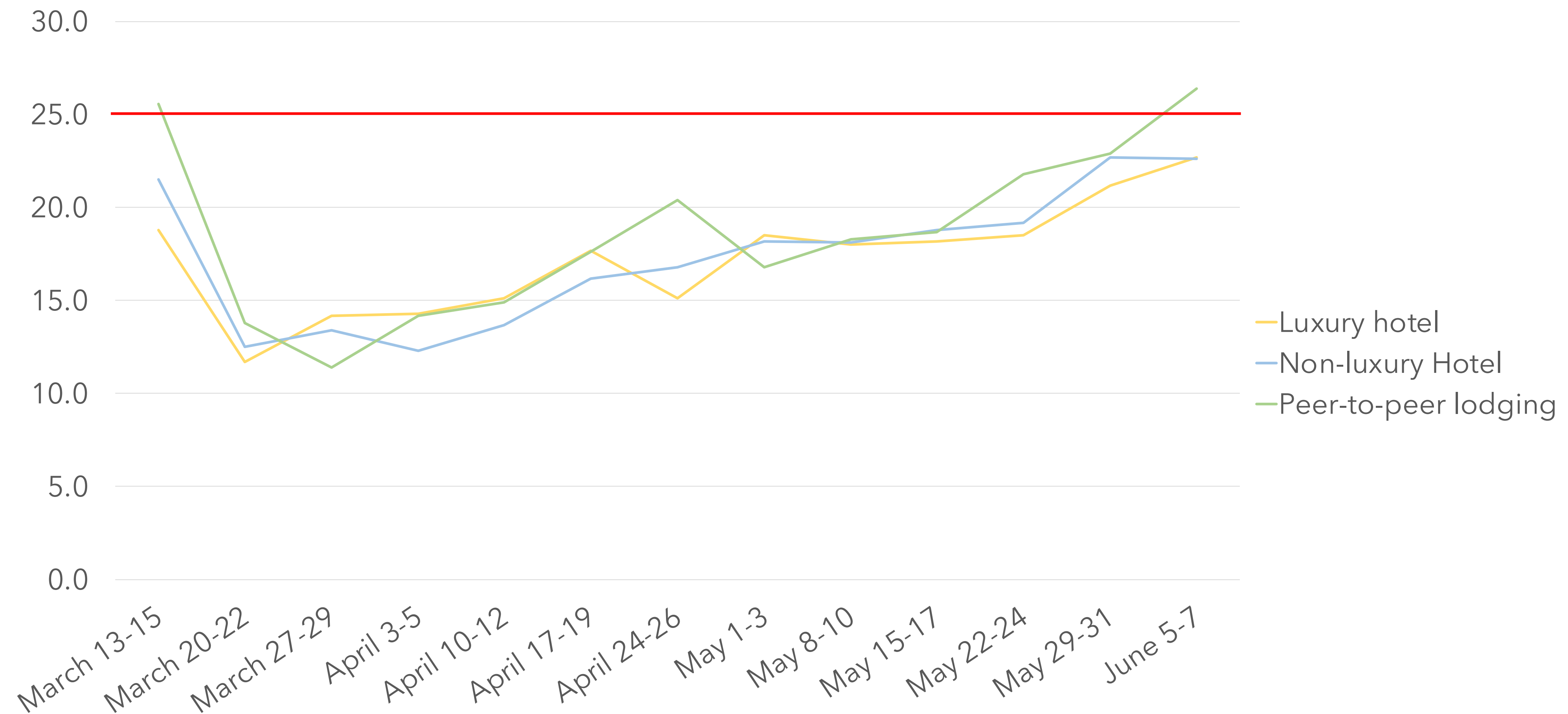
- Safety concerns grew again among Suburban respondents this week while showing drops for Urban and Rural respondents.
- Rural respondents reported modest growth in openness to travel messaging and the relatively highest levels of excitement to travel now.



Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer lodging travelers showed a significant decrease in concerns for personal safety this week (5.9 out of 10, down from 6.6 last week).
- Luxury hotel travelers were most likely to report they planned to travel before the end of 2020.





THOSE WHO ARE READY TO TRAVEL:

- **Affluent, primarily identify as Caucasian and one-in-five have children under 18**
- **Are comfortable with their home state re-opening its economy right now**
- **Feel comfortable going out into and experiencing their community**
- **Are more open to having travelers come to their community**



THOSE WHO ARE READY TO TRAVEL:

- **Expect the coronavirus situation in the U.S. to get better in the next month**
- **Would feel happy if a friend or family member told them they purchased airline tickets for a June trip**
- **Disagree with the statement that they will not travel until there is a vaccine**
- **Expect that they will be traveling this Fall**
- **Say that discounts and deals make them more interested in traveling in the next three months**
- **Found doing online searches related to travel and travel apps. Likelier to be looking at attraction and airline websites right now**



THOSE WHO ARE READY TO TRAVEL:

- **Have leisure trips planned in the summer months of June, July and August. In fact, one-third expect that their next road trip will take place this month**
- **Have a good picture of what their next leisure trip will look like. Nine-in-ten describe their next leisure trip as somewhat or very well-developed**
- **Are likely to report that their personal safety did NOT play a role in decisions for their next leisure trip**
- **Are the likeliest to say that there is no chance that they might cancel their next leisure trip due to the coronavirus situation. They're going no matter what**

A scenic landscape of rolling green mountains at sunset. The sun is low on the horizon, casting a warm glow over the mountains. The sky is filled with colorful clouds in shades of orange, red, and purple. In the foreground, there are vibrant pink flowers, likely rhododendrons, growing on a hillside. The mountains in the background are layered, creating a sense of depth.

North Carolina + The Outer Banks

NC-Oriented Travelers

- **More excited about and open to traveling than the average American traveler**
- **Higher expectations to be traveling this Fall and plan to take more road trips**
- **More likely to consider taking a vacation to an important way to prioritize relaxation in their lifestyle**



The OBX

- **Vacation rental travelers are more ready to travel and feel safer about these types of accommodations**
- **Family travelers are feeling relatively readier to take trips**
- **Americans are desiring destinations with beaches, outdoor experiences that allow them to avoid crowds**
- **Destinations that don't require air travel are more attractive for near-term travel**
- **Americans say they will be more likely to visit destinations that were quick to institute social distancing practices and were not hard-hit by the coronavirus**
- **Americans desire a destination that makes them feel like they have a control over their safety and is taking their safety seriously**



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**

