

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 18

RESEARCH FINDINGS

July 13, 2020

Destination  Analysts

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Project Overview

The goal of this research is to understand and track the widespread disruption and damage to the travel and tourism industry caused by the coronavirus. To do so, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the 18th wave of this project are presented in this report. The survey is being conducted weekly to track traveler sentiment and generate insight into when tourism businesses can expect demand to return.

The survey questionnaire used here is multifaceted and asks a representative sample of adult American travelers to report their experiences and feelings around the current pandemic situation. We expect the value of this survey to increase as additional waves of the project are completed and we can see emerging trends. For now, we present this data primarily on topline with our additional observations included.

The 18th wave of this survey was collected from July 10-12, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,213 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



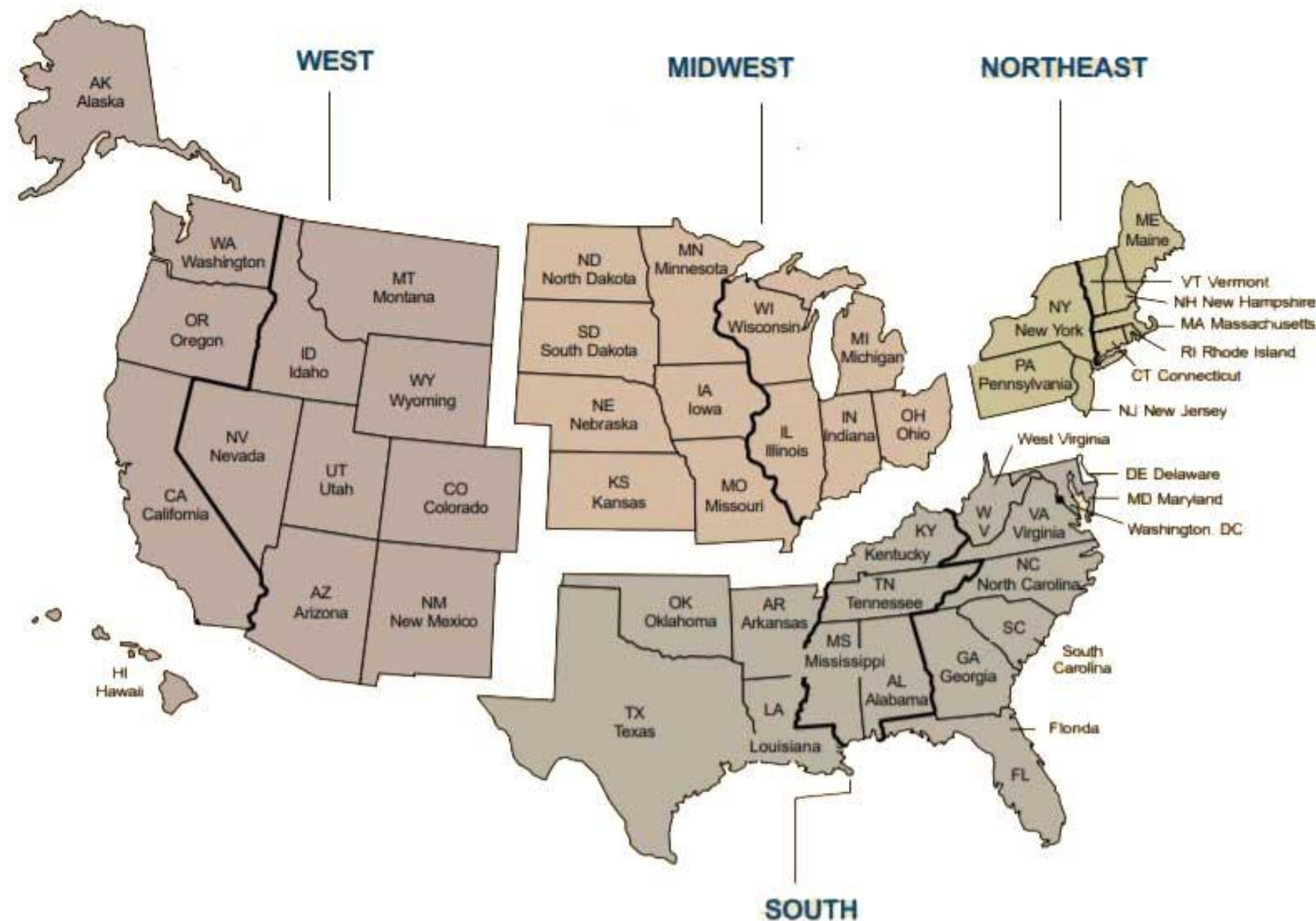
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Project Overview

Data weighting. The survey sampling plan used in this project collected 300 fully-completed surveys in each of the four regions shown in the map below. The overall results presented in this report are weighted to reflect the actual populations of the regions.

Moving forward. The COVID-19 situation is rapidly evolving, and its impact on the travel industry is far from clear. As a result, Destination Analysts plans to conduct this survey weekly into the foreseeable future. Weekly reports have been, or will be, made on the following schedule at right.

Map of U.S. Showing Survey Regions



	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
Wave #11	May 22-24	May 25
Wave #12	May 29-31	June 1
Wave #13	June 5-7	June 8
Wave #14	June 12-14	June 15
Wave #15	June 19-21	June 22
Wave #16	June 26-28	June 29
Wave #17	July 3-5	July 6
Wave #18	July 10-12	July 13
Wave #19	July 17-19	July 20
Wave #20	July 24-26	July 27

Top Takeaways

The following are the top takeaways that emerged from Wave 18 of this weekly consumer traveler sentiment tracking study.

- A record low 13.8 percent of American travelers feel the pandemic will get better in the US in the next month; instead nearly two-thirds feel it will get worse.
- Personal safety concerns are the highest they have been in three months.
- The perceived safety of travel activities this week (60.3% average score for all activities tested) remains consistent with the past two weeks.
- A record 41.5 percent of American travelers now say they have no trip plans for the rest of year, and only 35.7 percent agree they will be traveling in the Fall now.



Top Takeaways

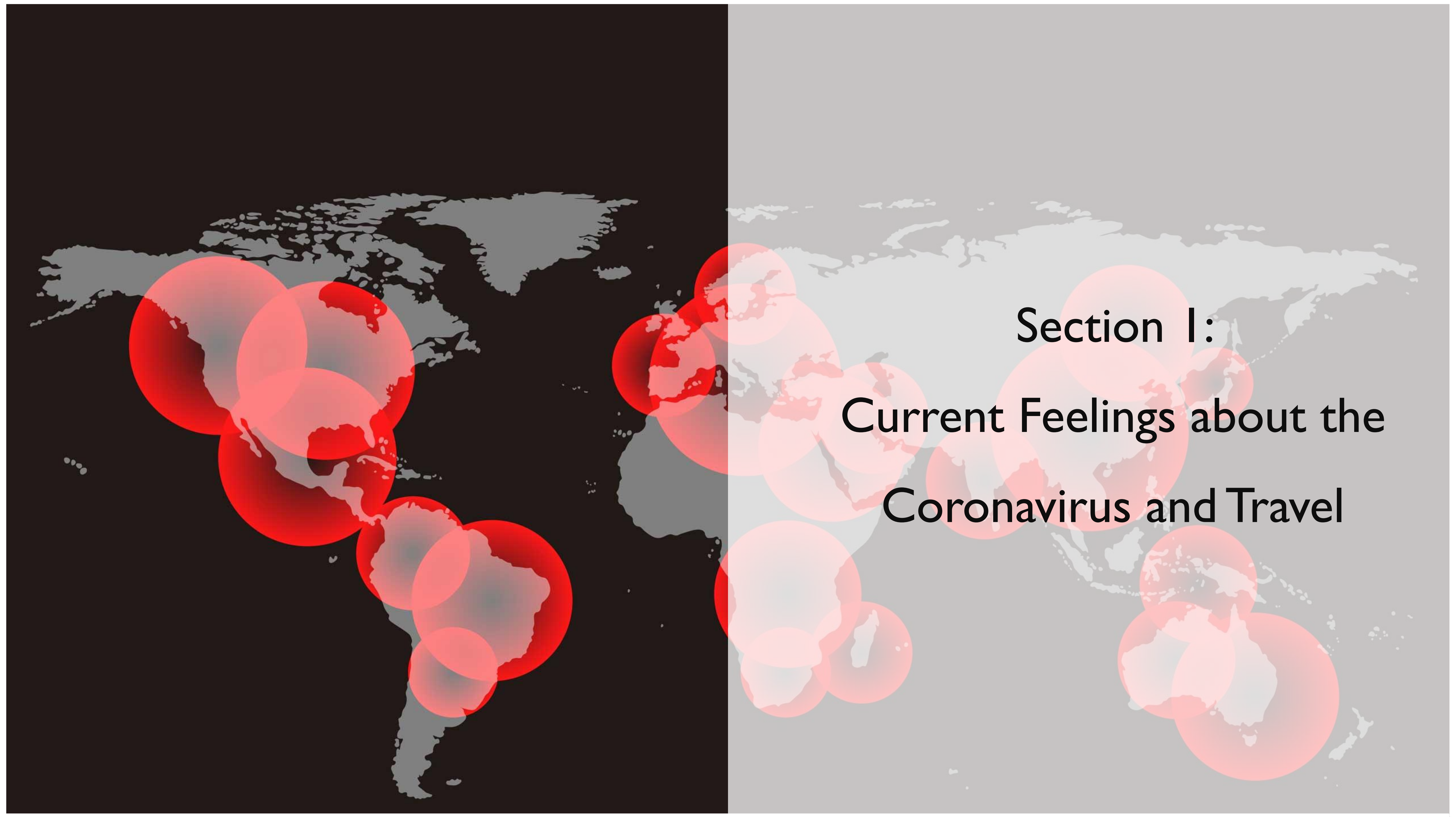


- A majority of American travelers continue to say that too many people in their communities are not wearing face masks and not maintaining the appropriate social distance in public.
- The percent of Americans who say they would be happy to see an ad promoting their community for tourism when it's safe remains depressed, below 40 percent.
- Travel marketing potential does exist: Now 11.0 percent say they are already in a “back traveling” state of mind; similarly, 11.1 percent say they are ready to travel with no hesitations; 35.3 percent say they could be convinced to take a trip this year that they hadn't previously considered.
- With road trips much more of a “now” consideration compared to commercial airline trips, August is currently when Americans expect to take their next road trip this year (14.6%). On average, they plan to travel 311 miles away from home on their next road trip. Meanwhile, 30.0 percent of Americans say that their next airline trip will take place sometime between May – December 2021 and they anticipate traveling an average of 1,013 miles away from home on their next air trip.

Top Takeaways

- Over half of conference and convention travelers would trust fellow attendees somewhat or a great deal (54.1%) to conduct themselves appropriately and do what they can to protect other attendees, while two-thirds (65.4%) would trust the hosting organization to look out for their health. The safety protocols that would make travelers feel most confident that the hosting organization is protecting attendees' health include required masks for all attendees, social distancing, enhanced cleaning and sanitation and providing hand sanitizer.
- Travelers in the Millennial or GenZ generations continue to exhibit less fear and hesitation and more openness and readiness to travel now. Men—particularly those with household incomes above \$80K—also continue to index more highly for travel marketability compared to women.



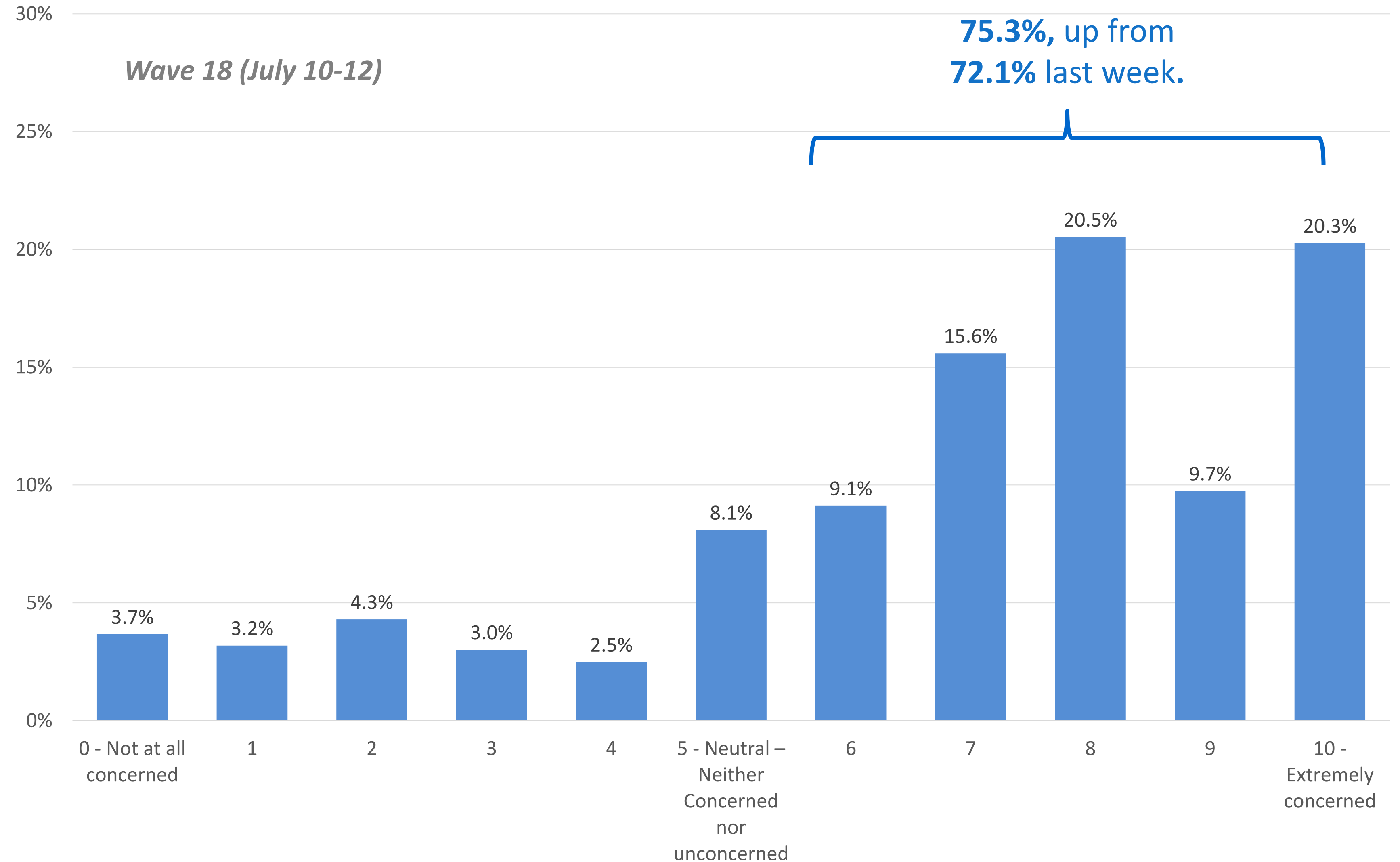


Section I:
**Current Feelings about the
Coronavirus and Travel**

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)

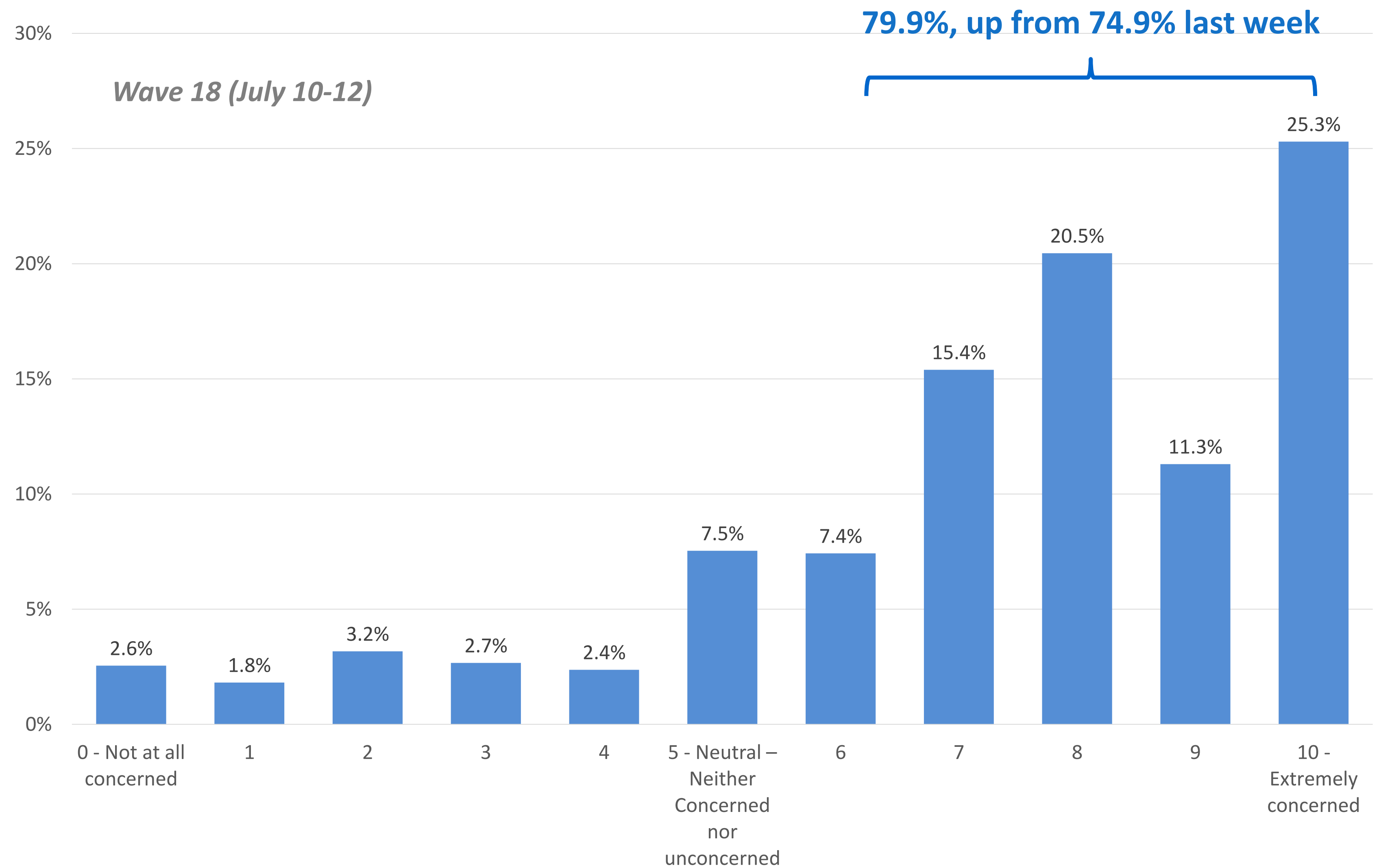
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



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)

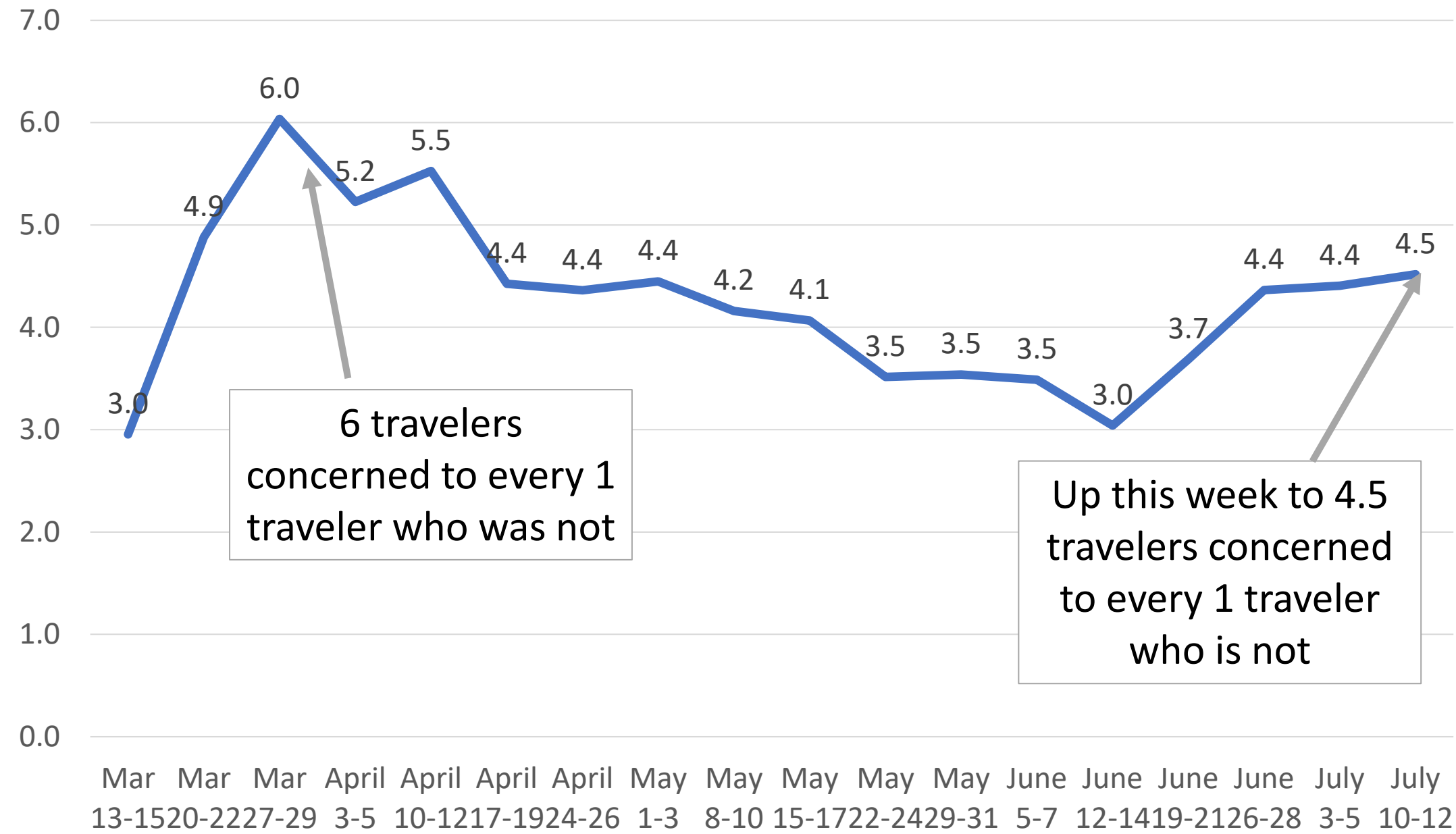
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



Ratio of Concerned to Unconcerned Travelers: Safety

Personal Safety

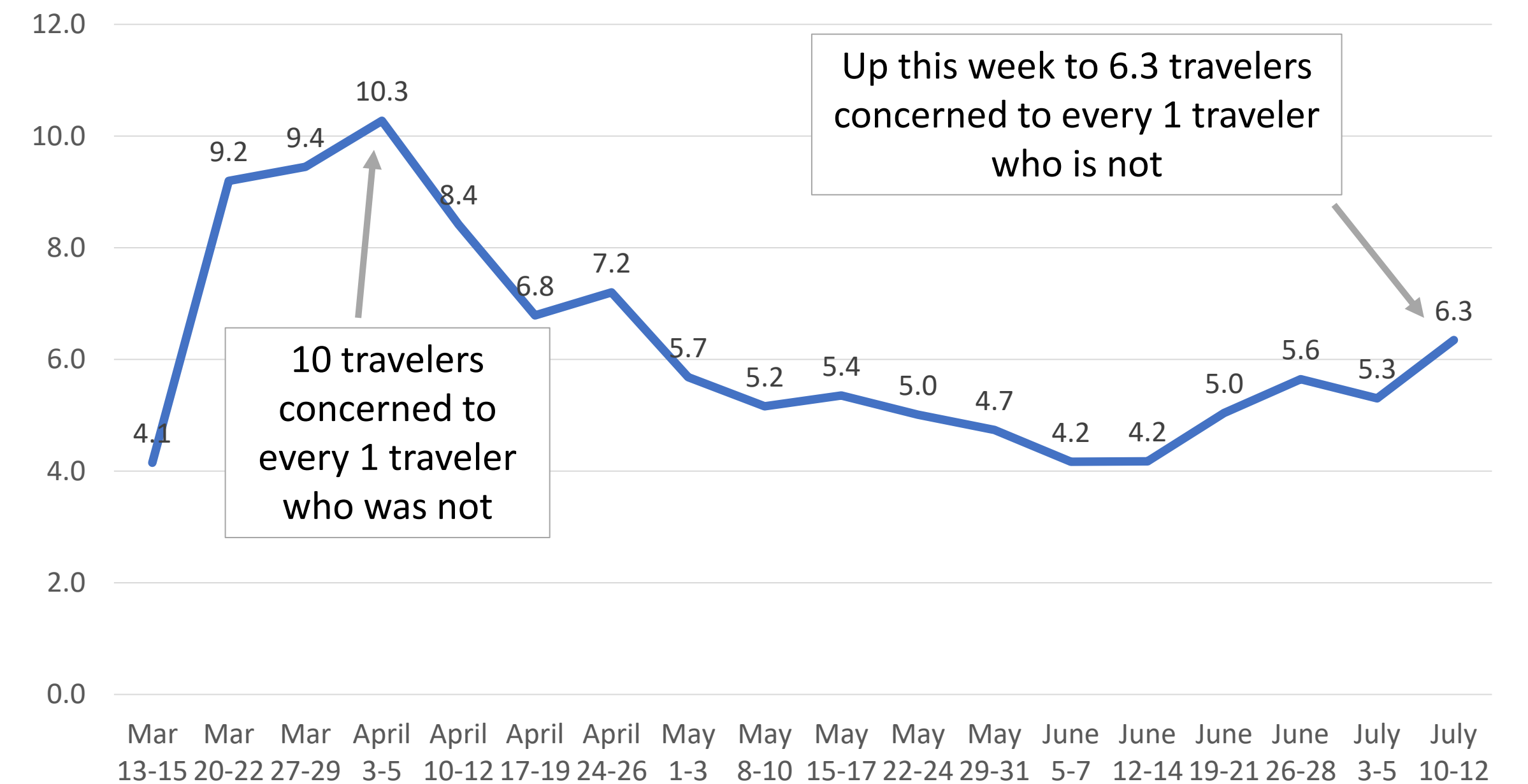
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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

Safety of Friends and Relatives

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



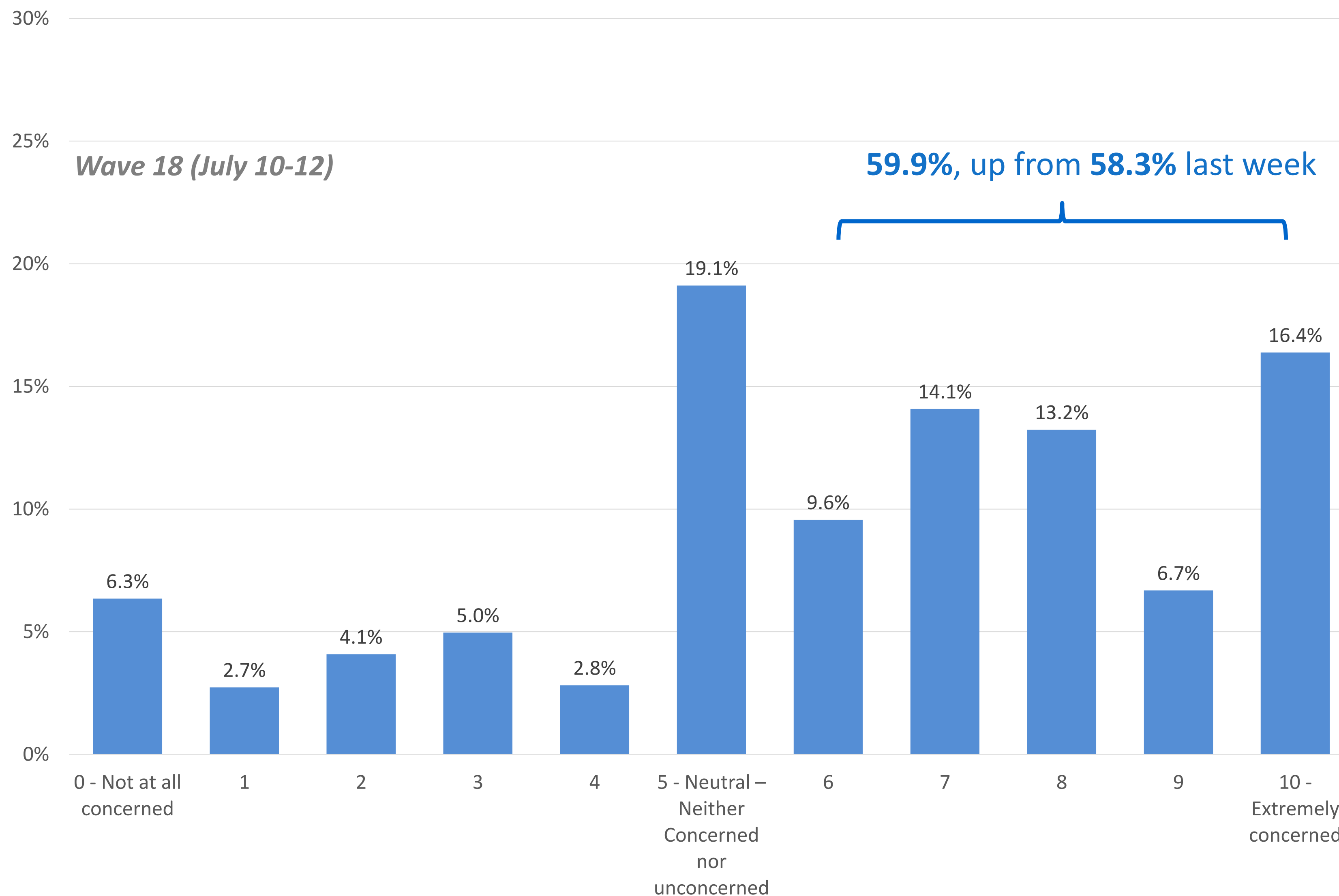
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(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, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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)

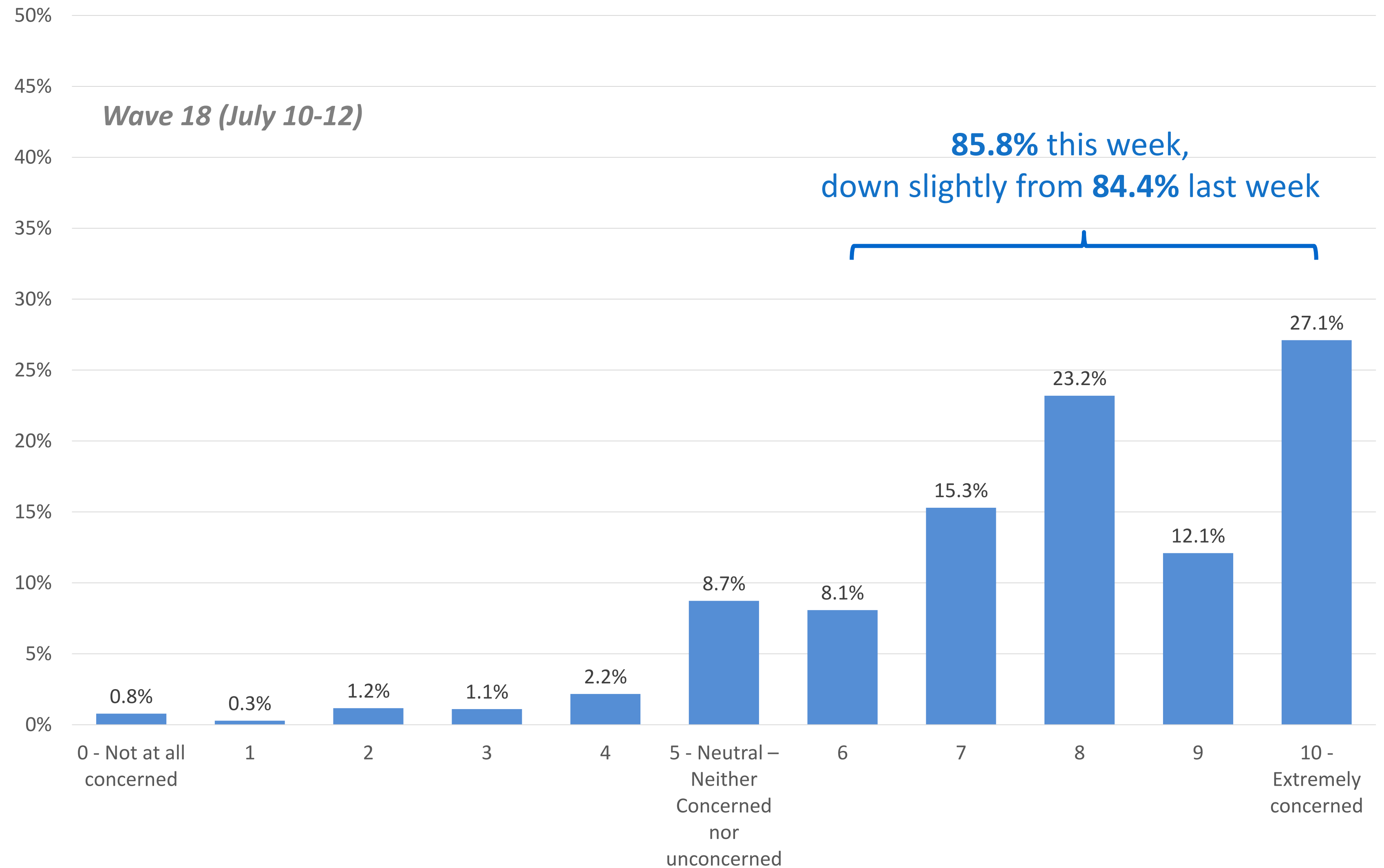
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



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?

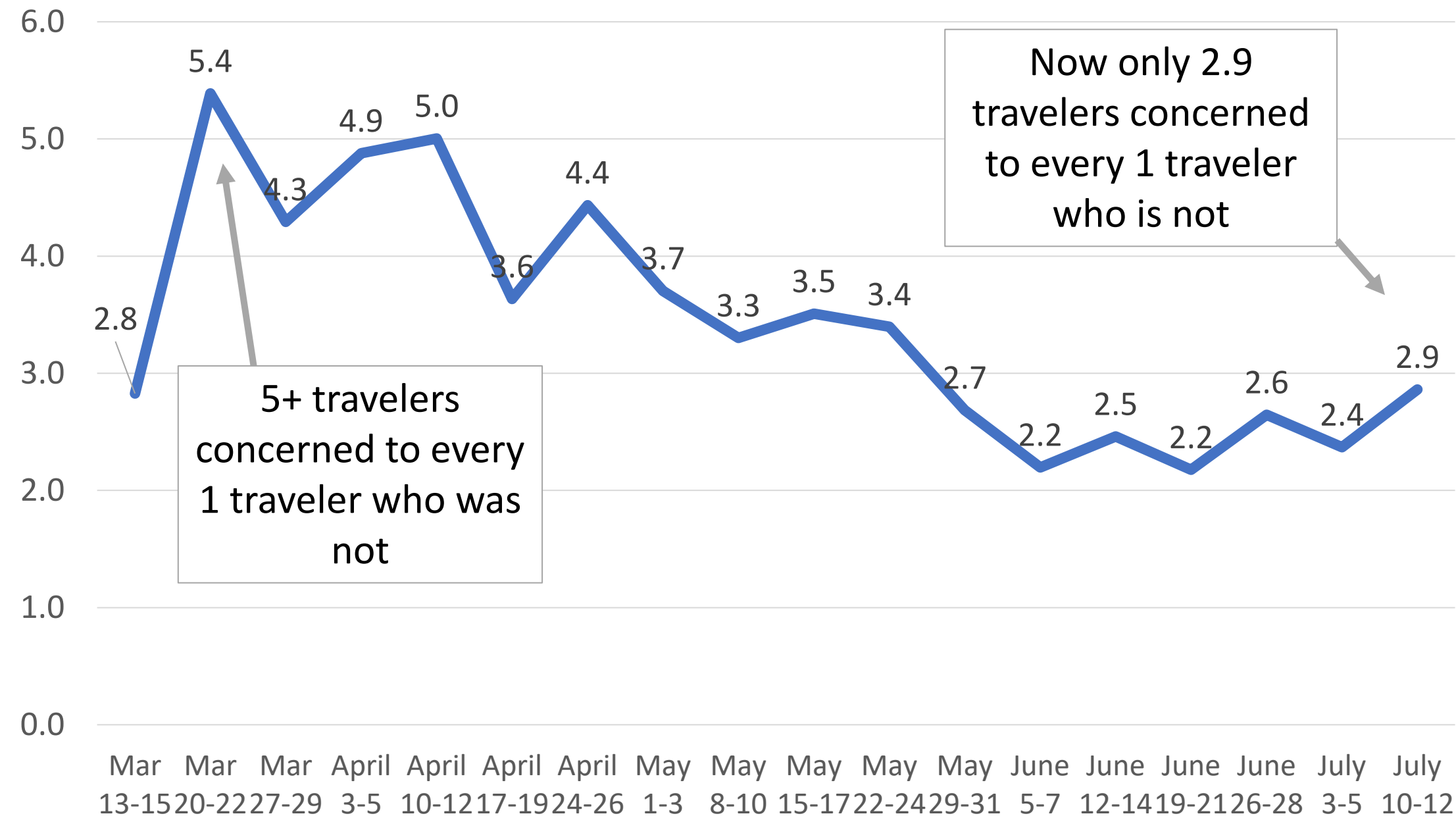
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Personal Finances

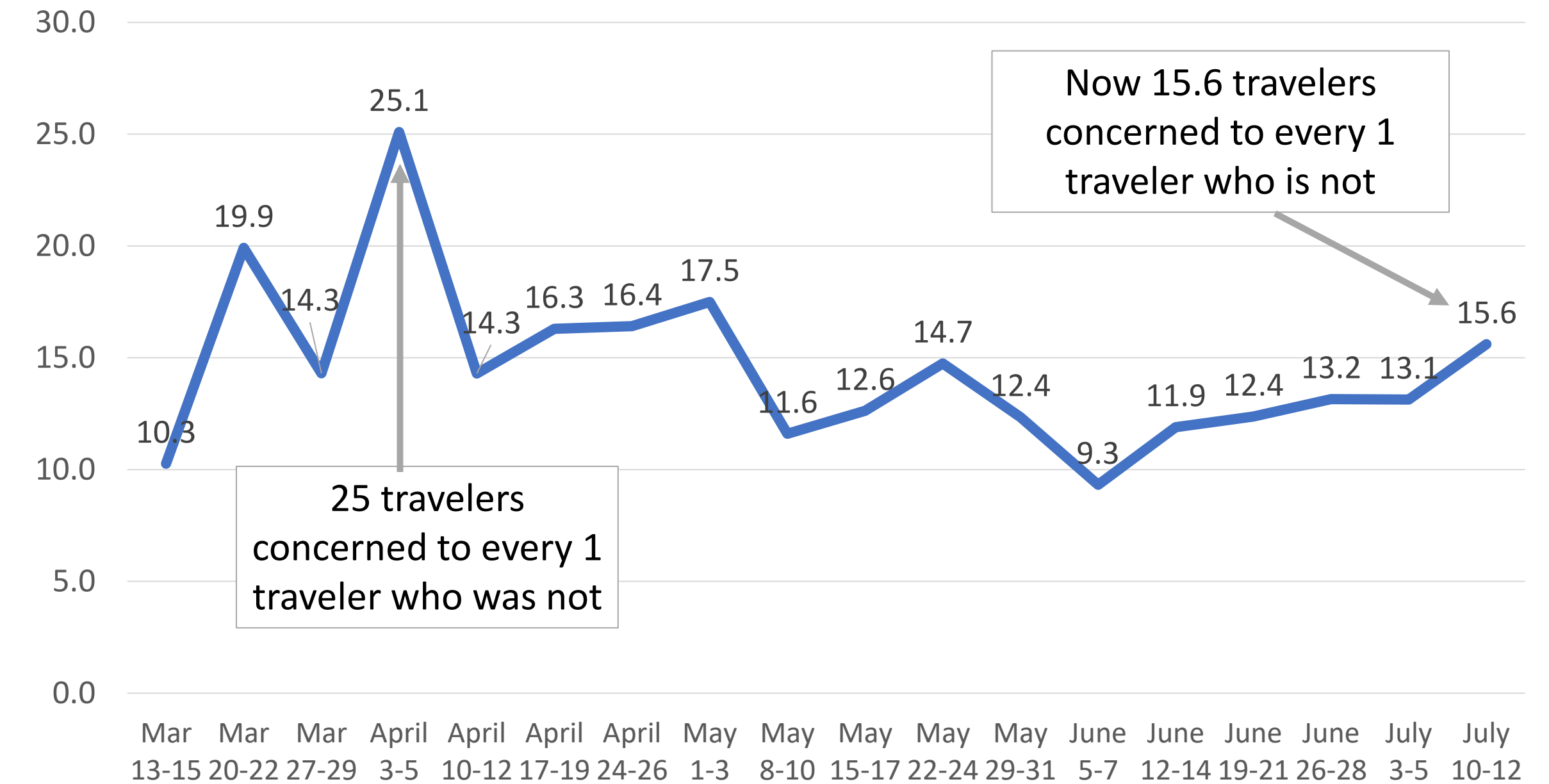
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



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



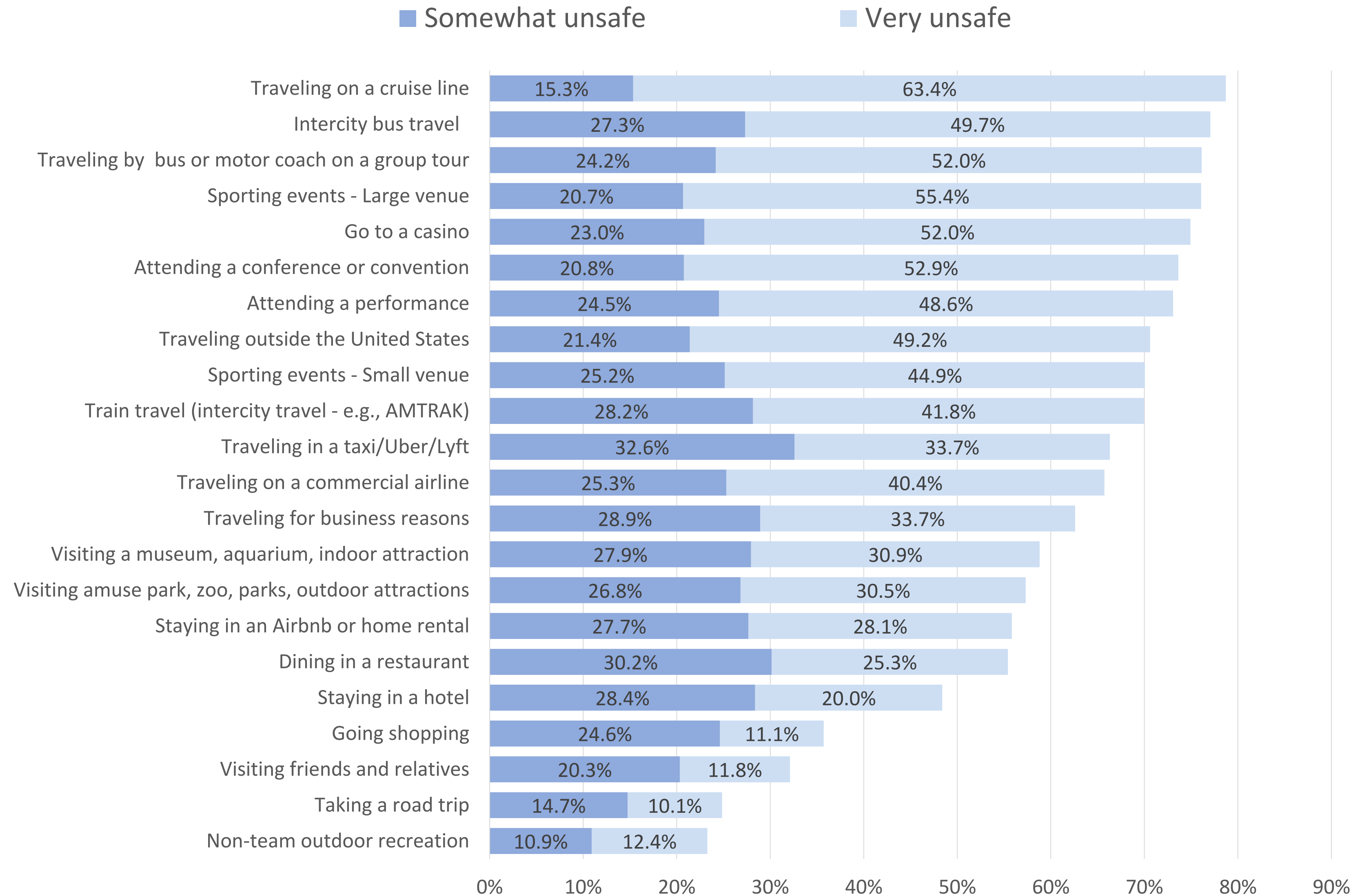
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY? (Please answer using the scale below)

(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, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

Perceived Safety of Travel Activities (Wave 18)

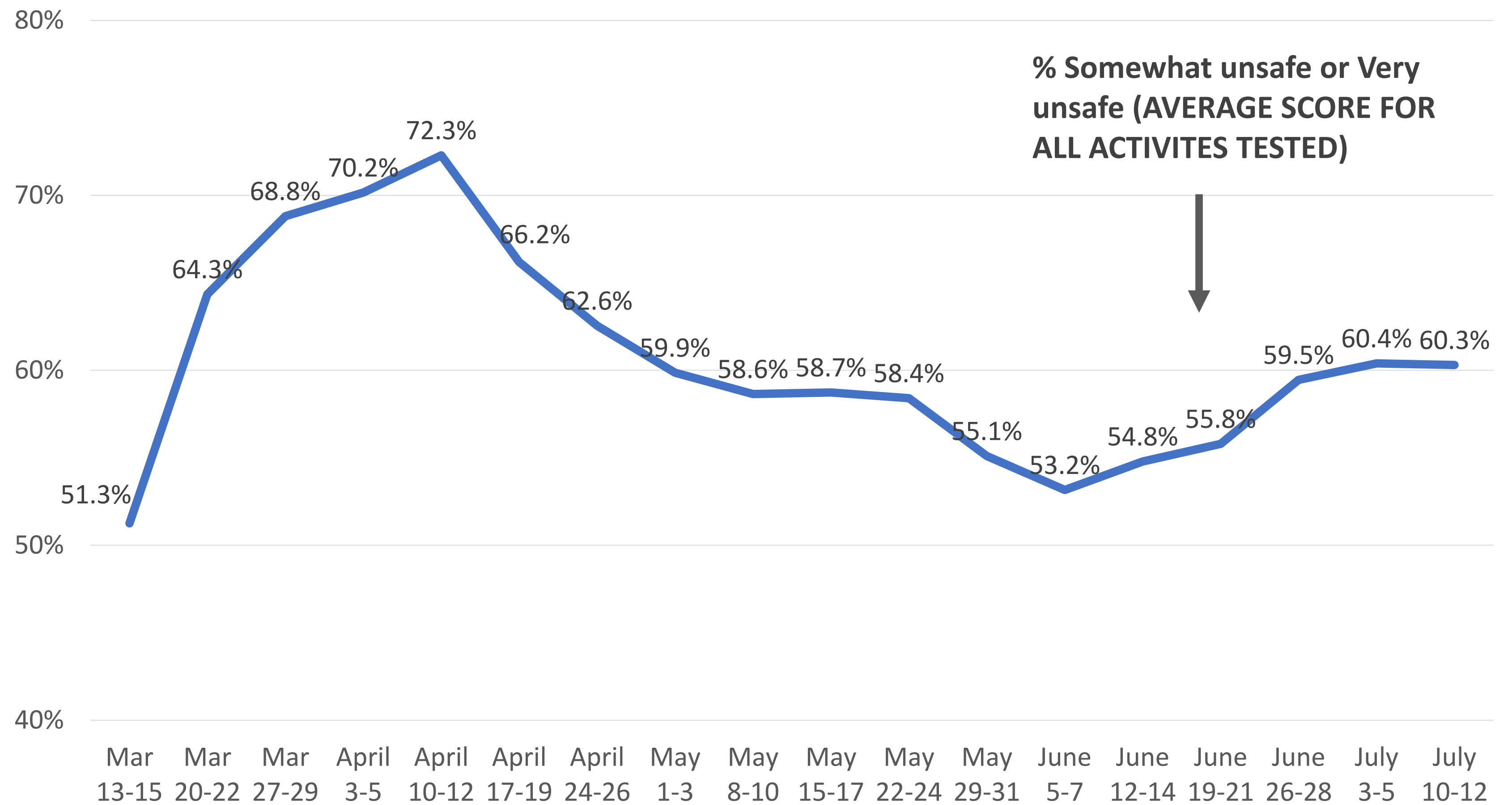
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



Perceived Safety of Travel Activities (Waves 1-18 Comparison)

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

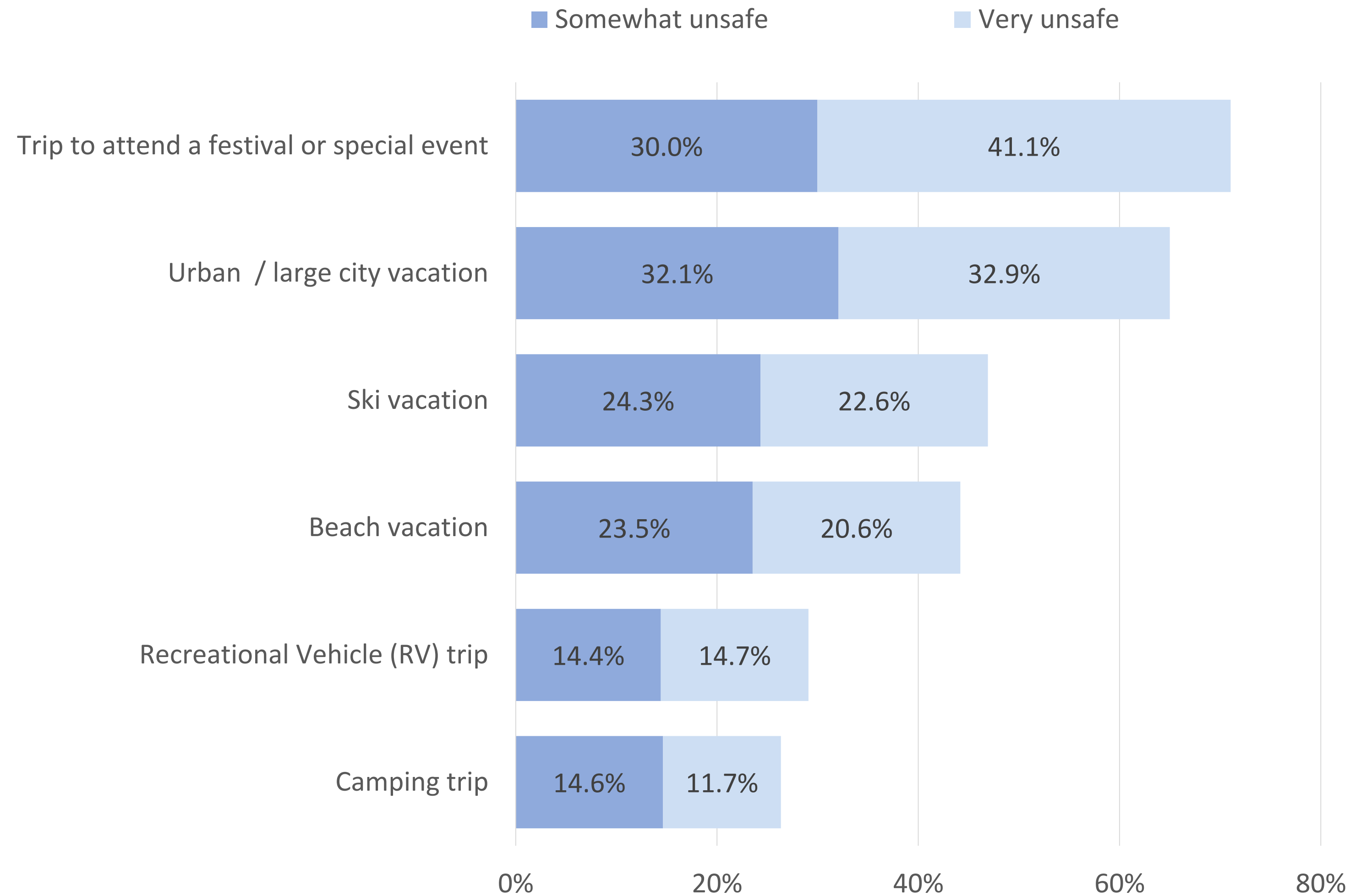


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

Perceived Safety of Trip Types

Question: Now use the same scale to evaluate the safety of several types of domestic leisure trips if taken some time in 2020.

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

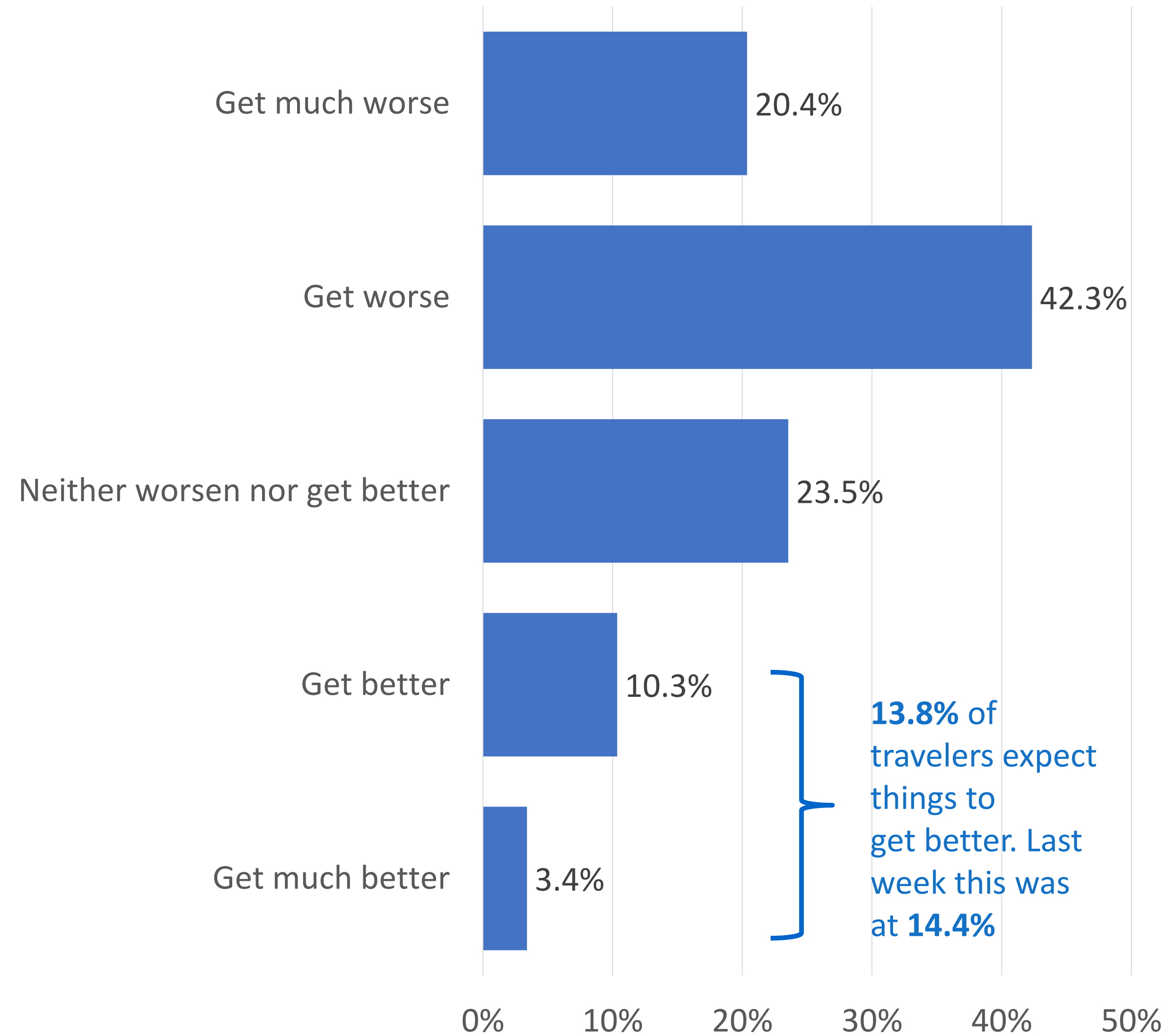


Expectations for the Coronavirus Outbreak

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: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



62.7% of travelers expect things to get worse. Last week this was at 63.0%

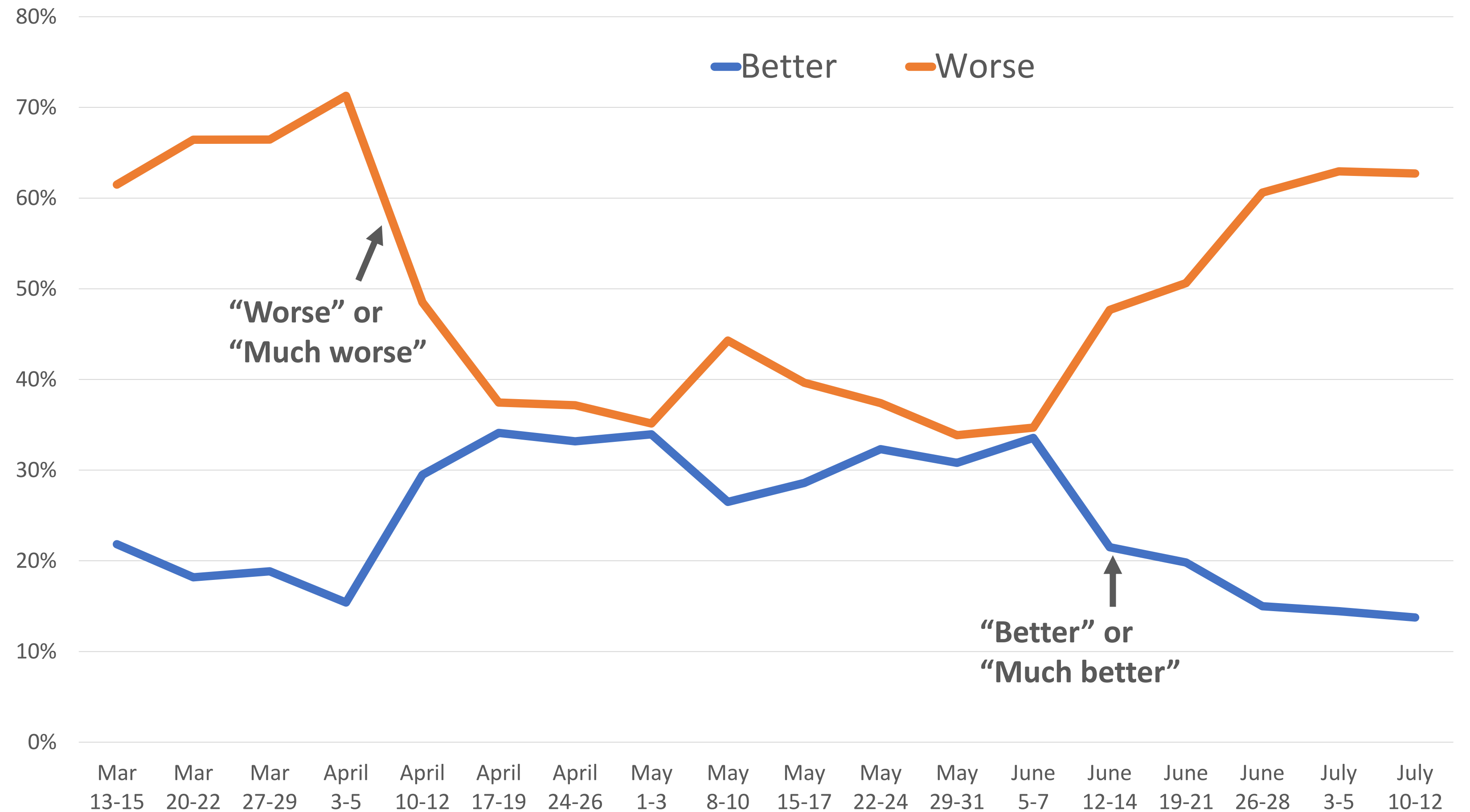
13.8% of travelers expect things to get better. Last week this was at 14.4%

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, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

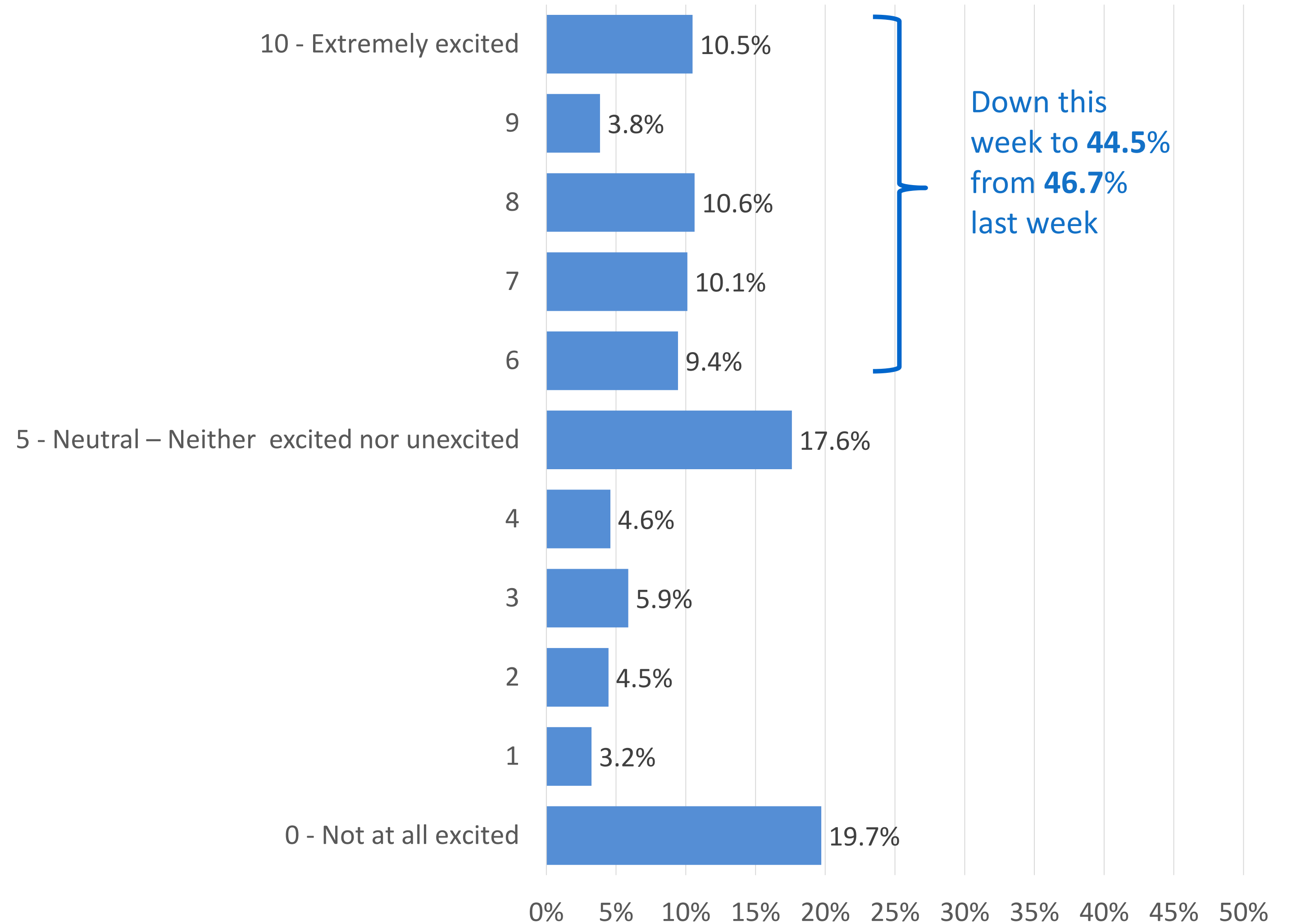


Excitement to Travel Now

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 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

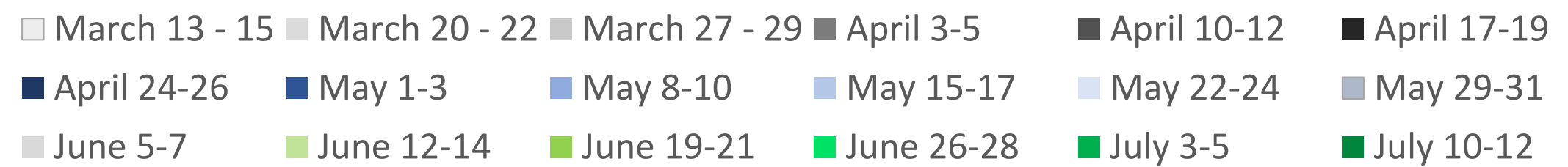
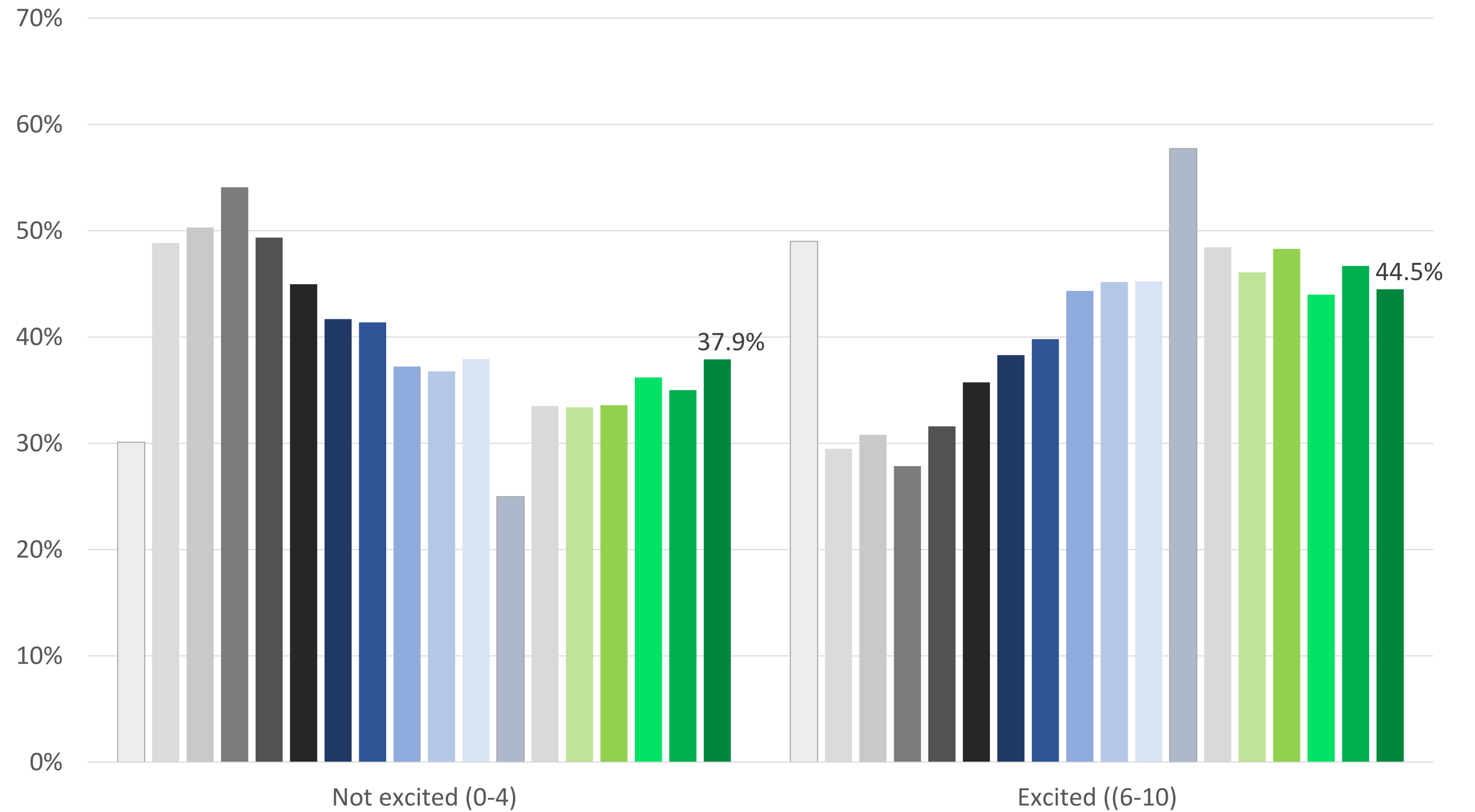


Excitement to Travel Now (Excited vs. Not Excited)

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)

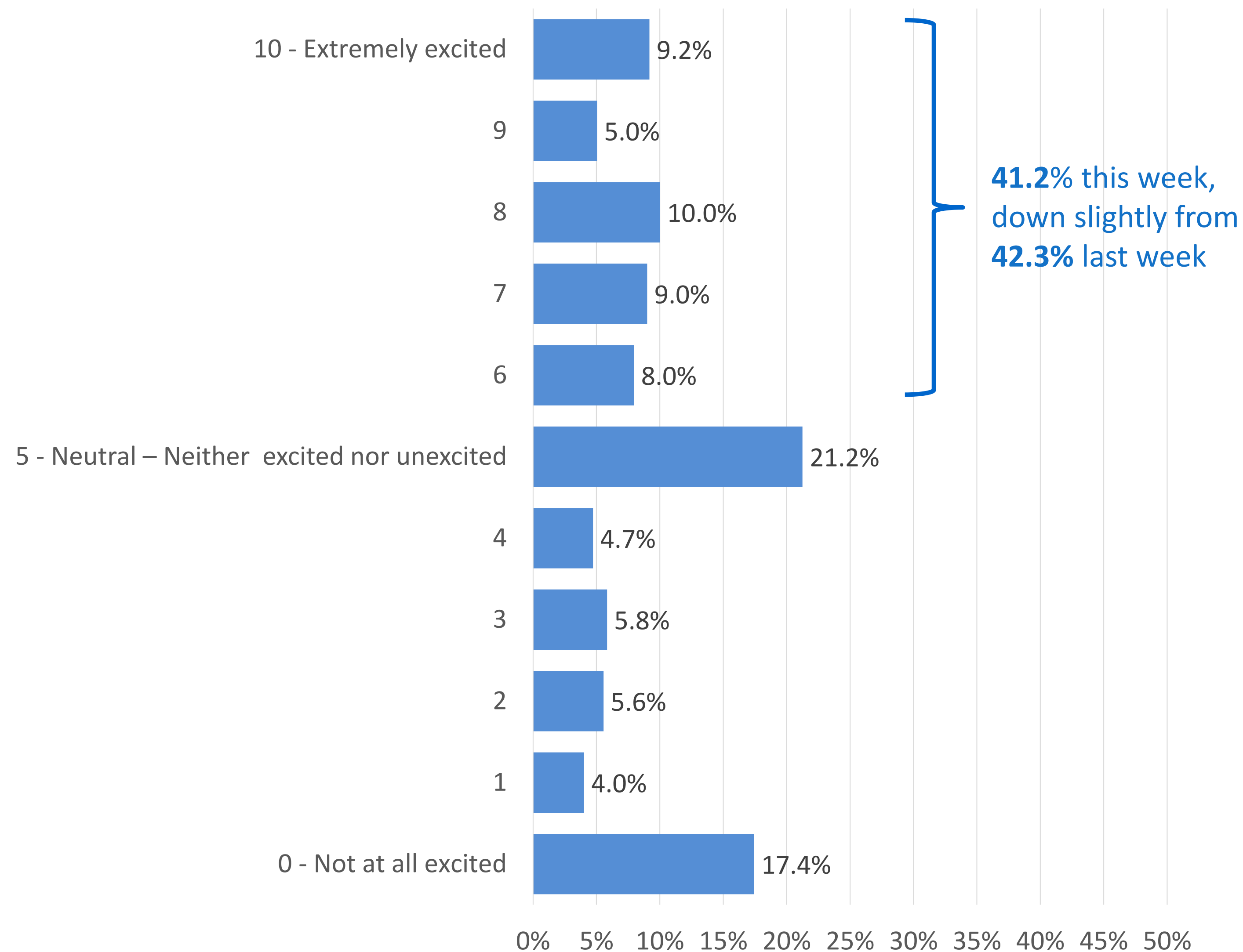
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)



Openness to Travel Information

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

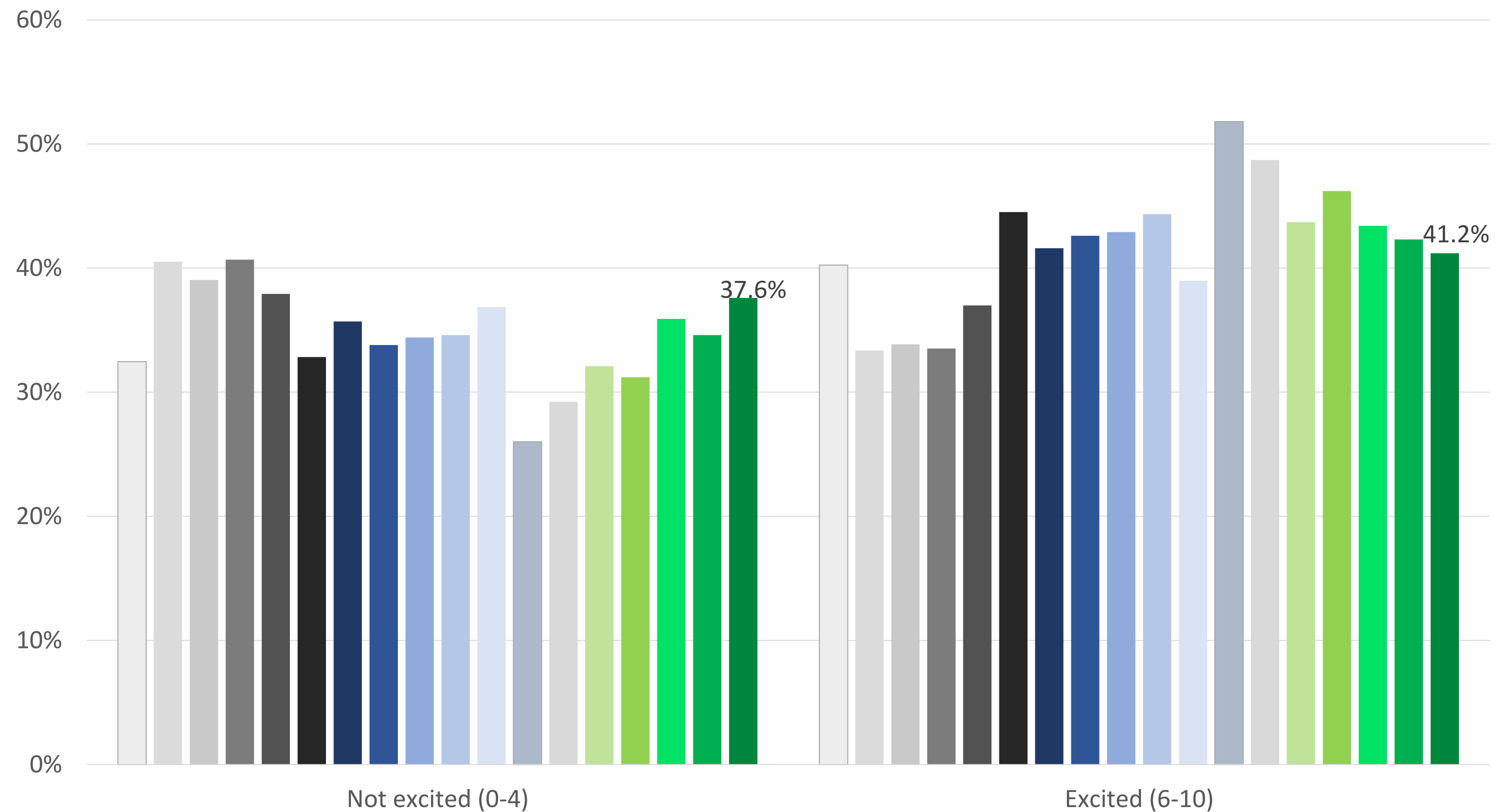
(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



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, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

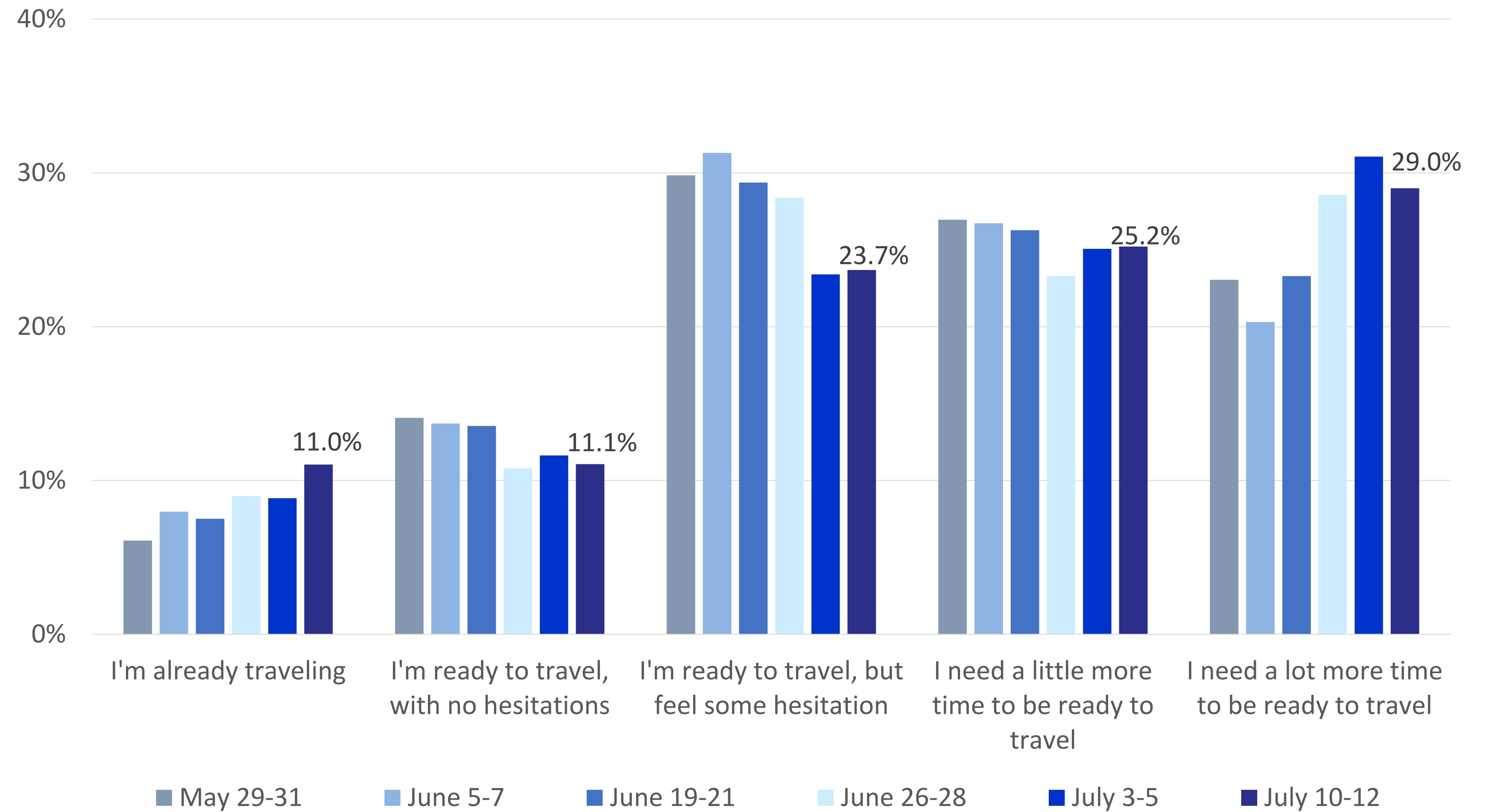


- March 13 - 15
- March 20 - 22
- March 27-29
- April 3-5
- April 10-12
- April 17-19
- April 24-26
- May 1-3
- May 8-10
- May 15-17
- May 22-24
- May 29-31
- June 5-7
- June 12-14
- June 19-21
- June 26-28
- July 3-5
- July 10-12

Travel State of Mind

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

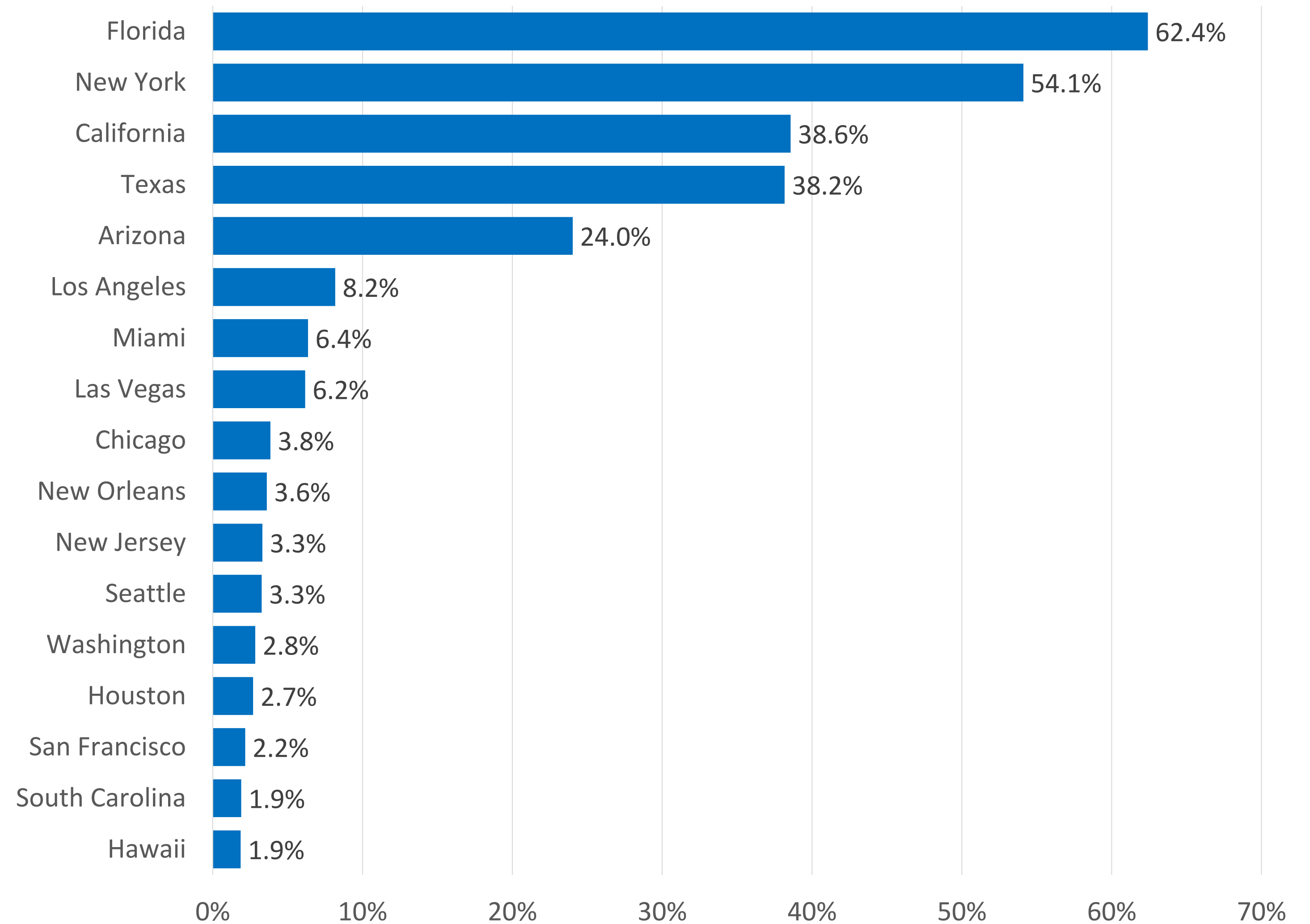
(Base: All respondents, 1,257, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected May 29-31, June 5-7, 19-21, 26-28, July 3-5 and 10-12, 2020)



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?
(OPEN-ENDED QUESTION)

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



Travel Experience Priorities

Question: Tell us about your TYPICAL PRIORITIES when traveling for leisure. However you personally define each, use the scale provided to indicate how important each is to you when traveling for leisure.

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

Top 2 Box Score: Critical importance or High Importance



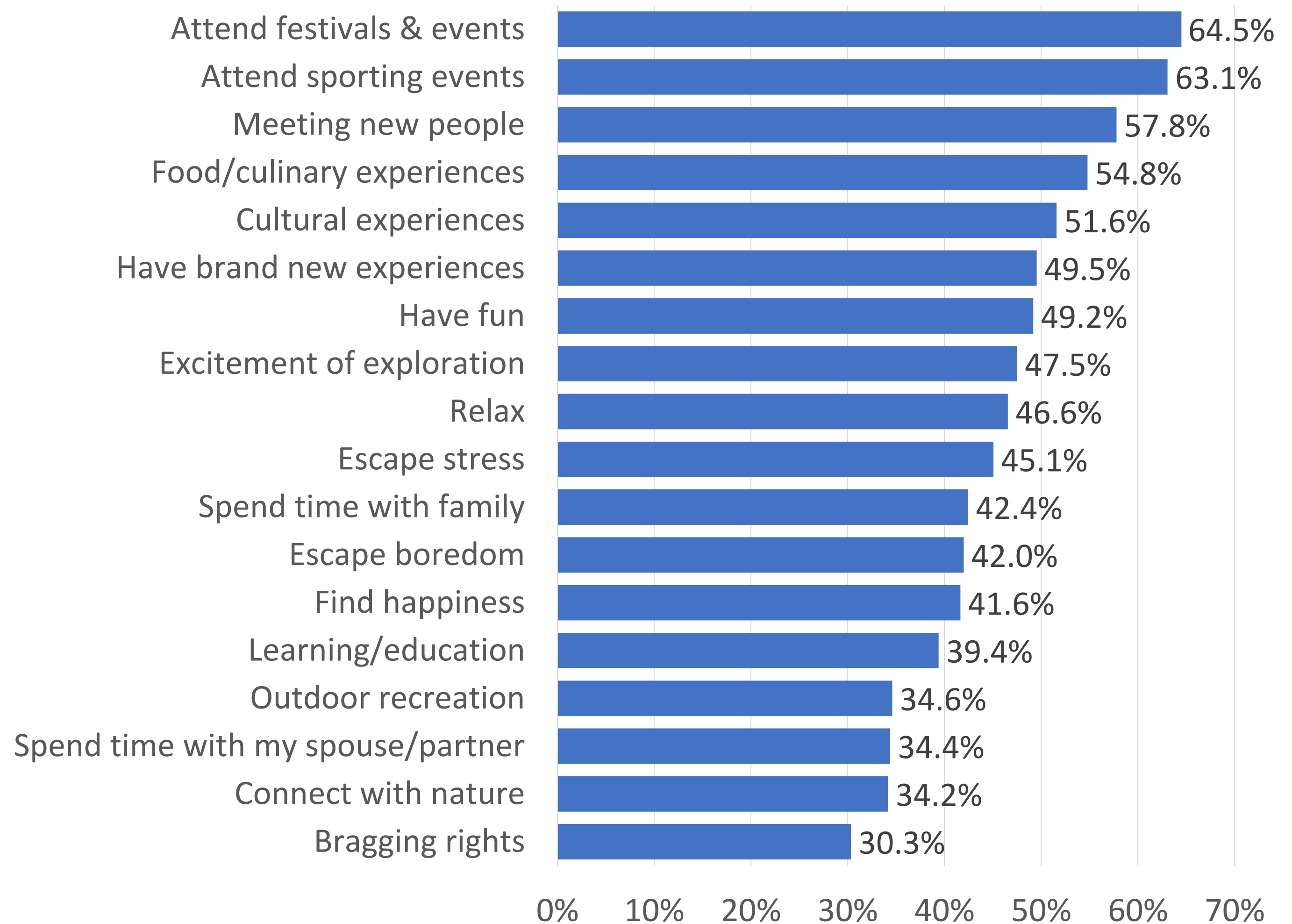
Covid-19's Impact on Ability to Experience Travel Priorities

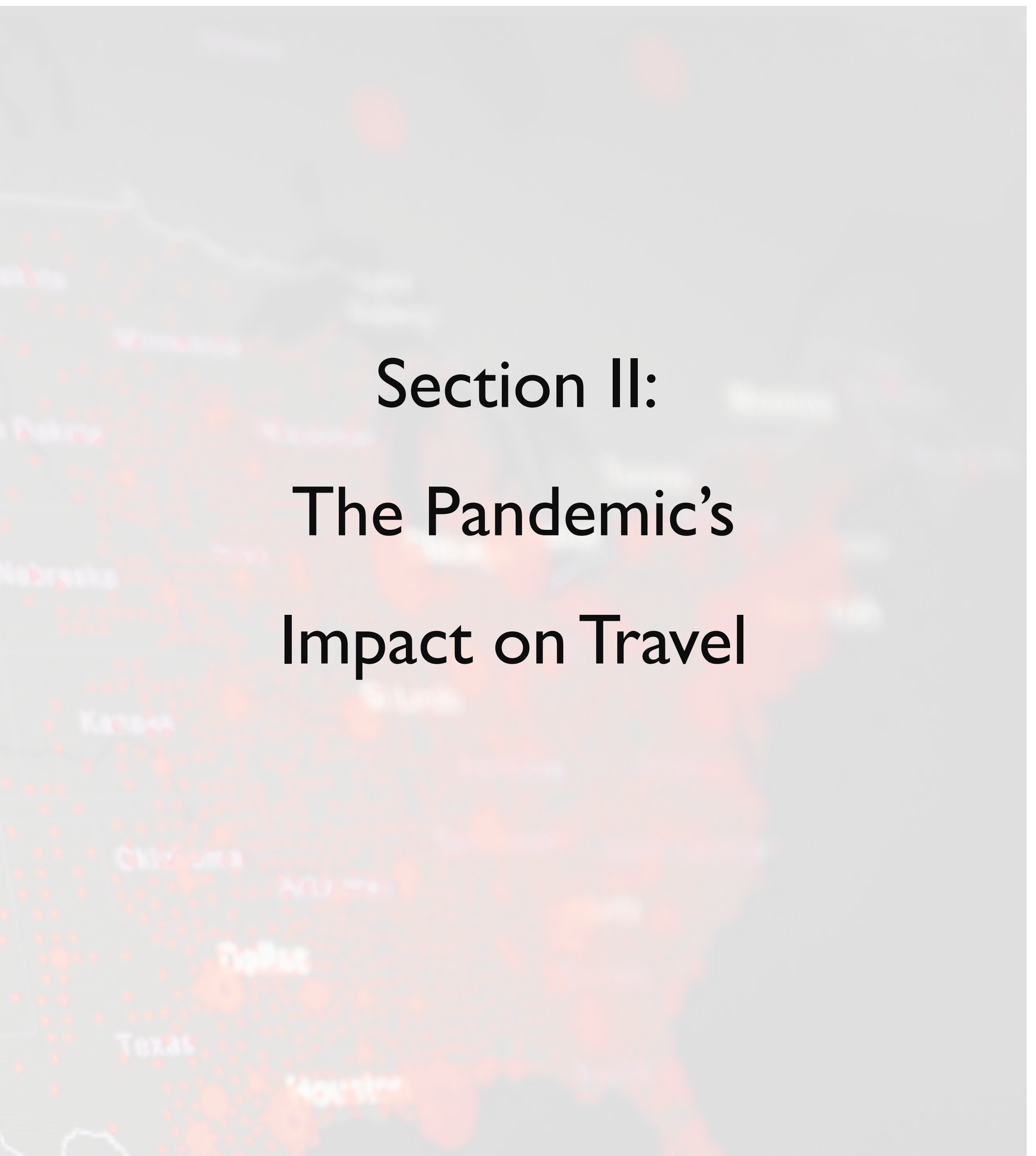
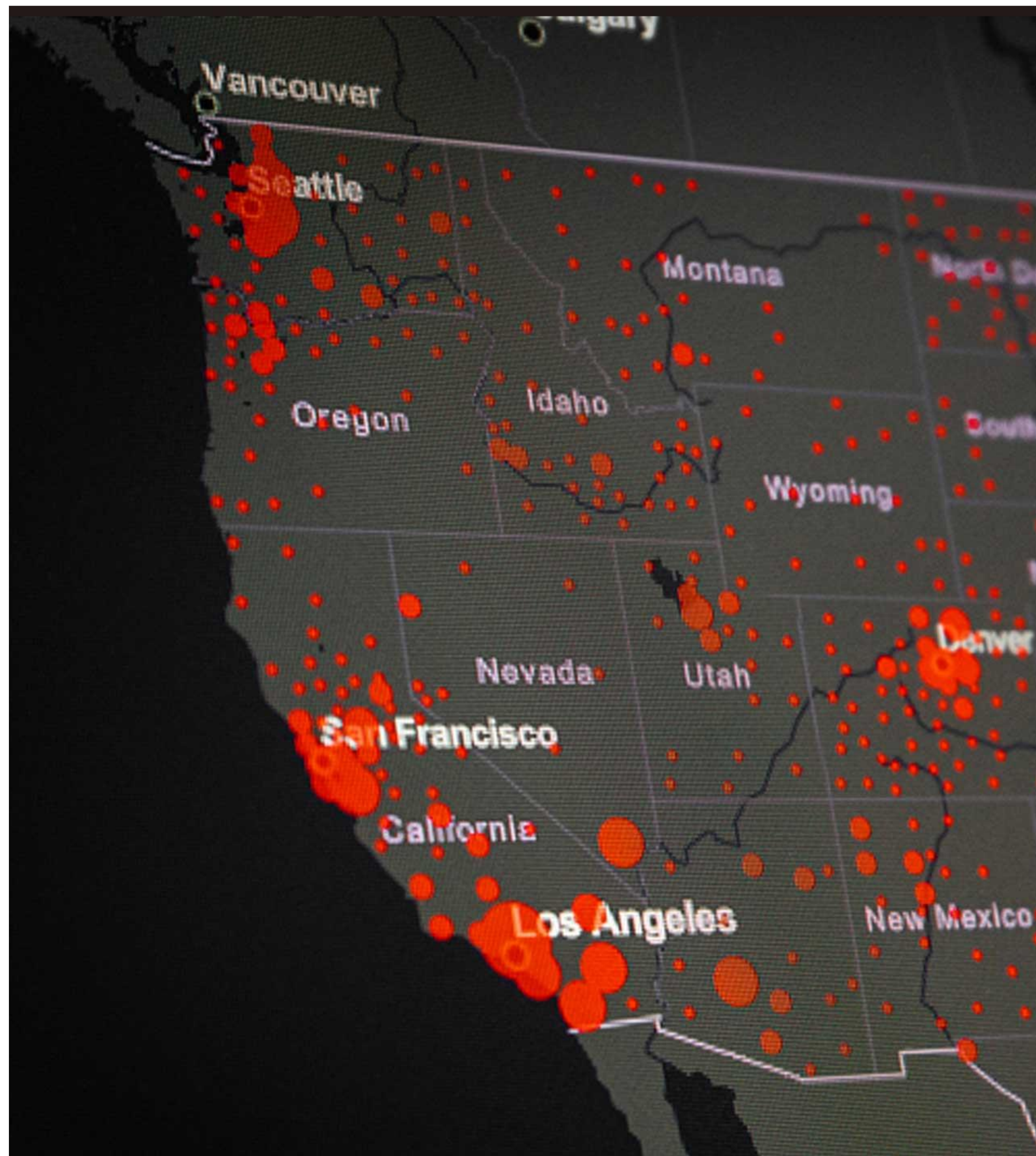
Question: If you were planning a leisure trip for later this year, how much of an effect do you feel the Coronavirus situation would have on your ability to pursue each?

(Select the one that describes the Coronavirus' impact on your ability to do each.)

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)

Top 2 Box Score: Significant Effect or Makes Impossible

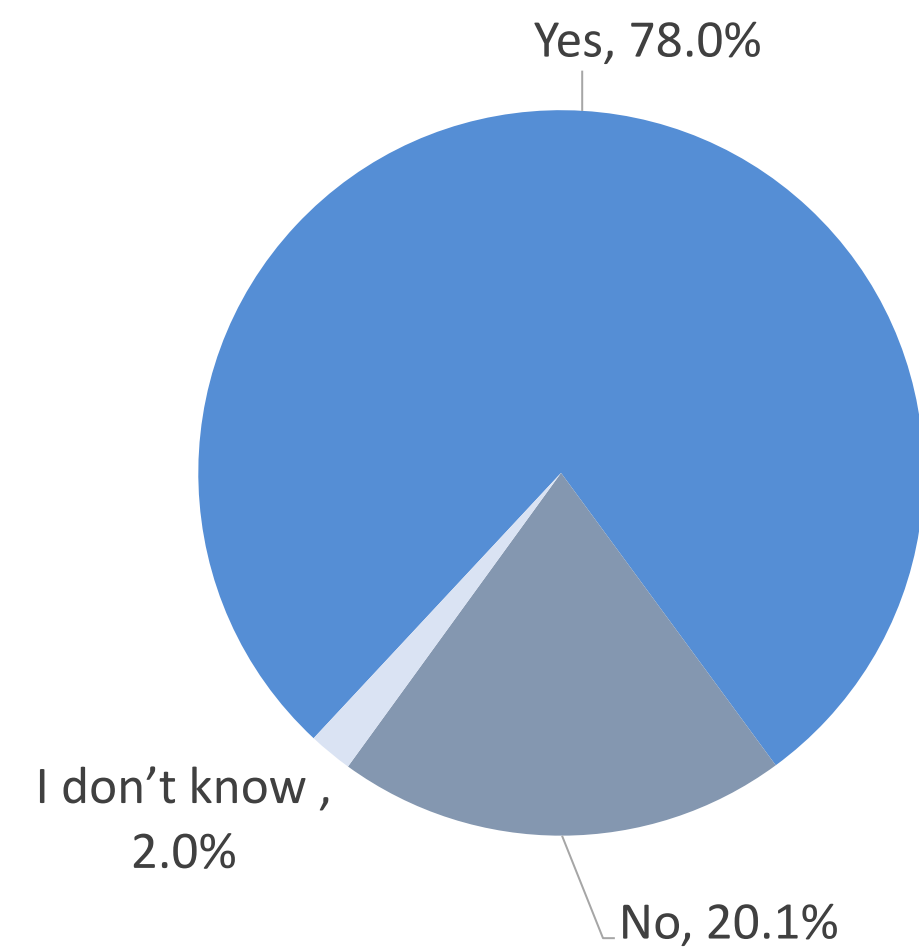




Section II:
The Pandemic's
Impact on Travel

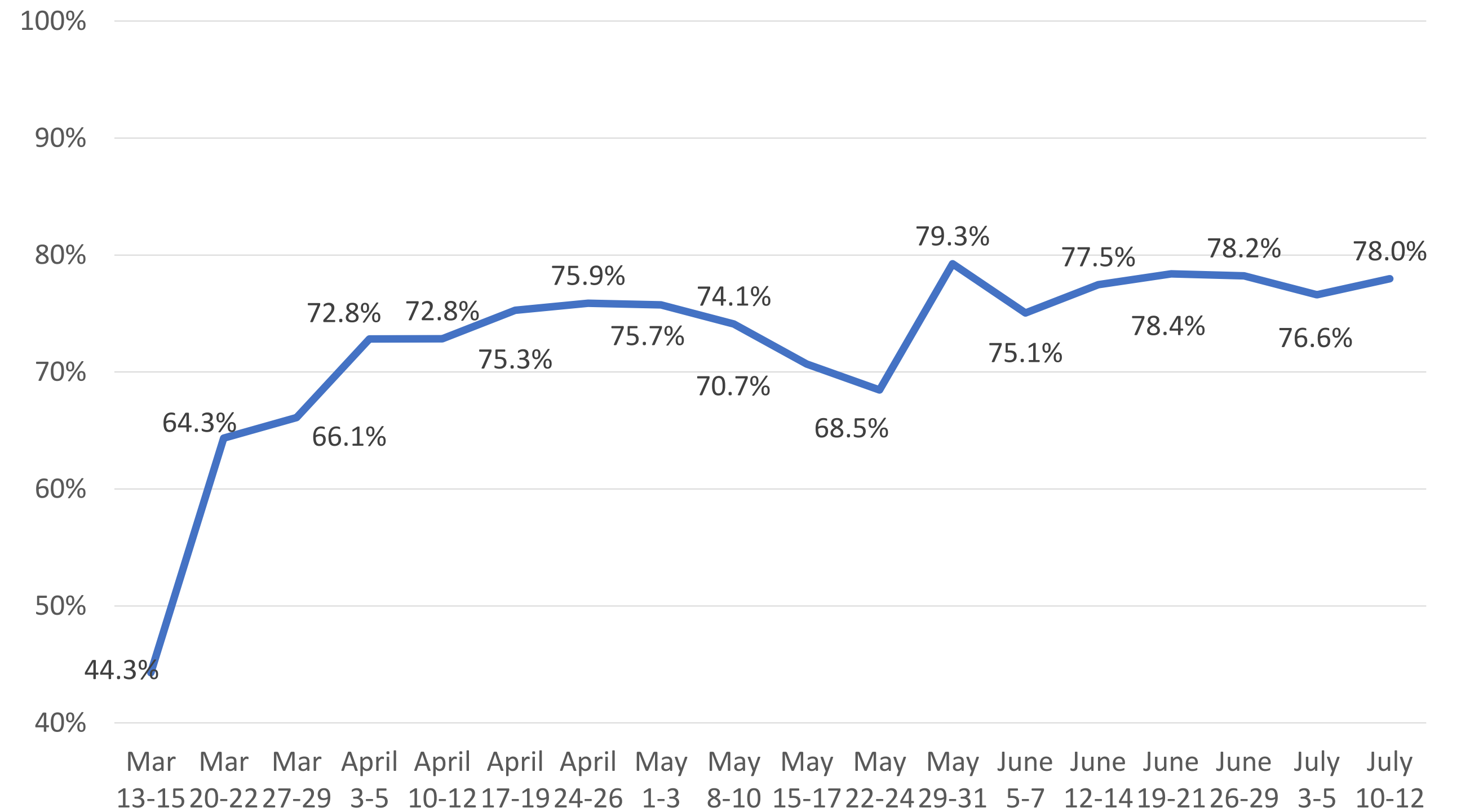
Impact of the Coronavirus on Travel

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



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

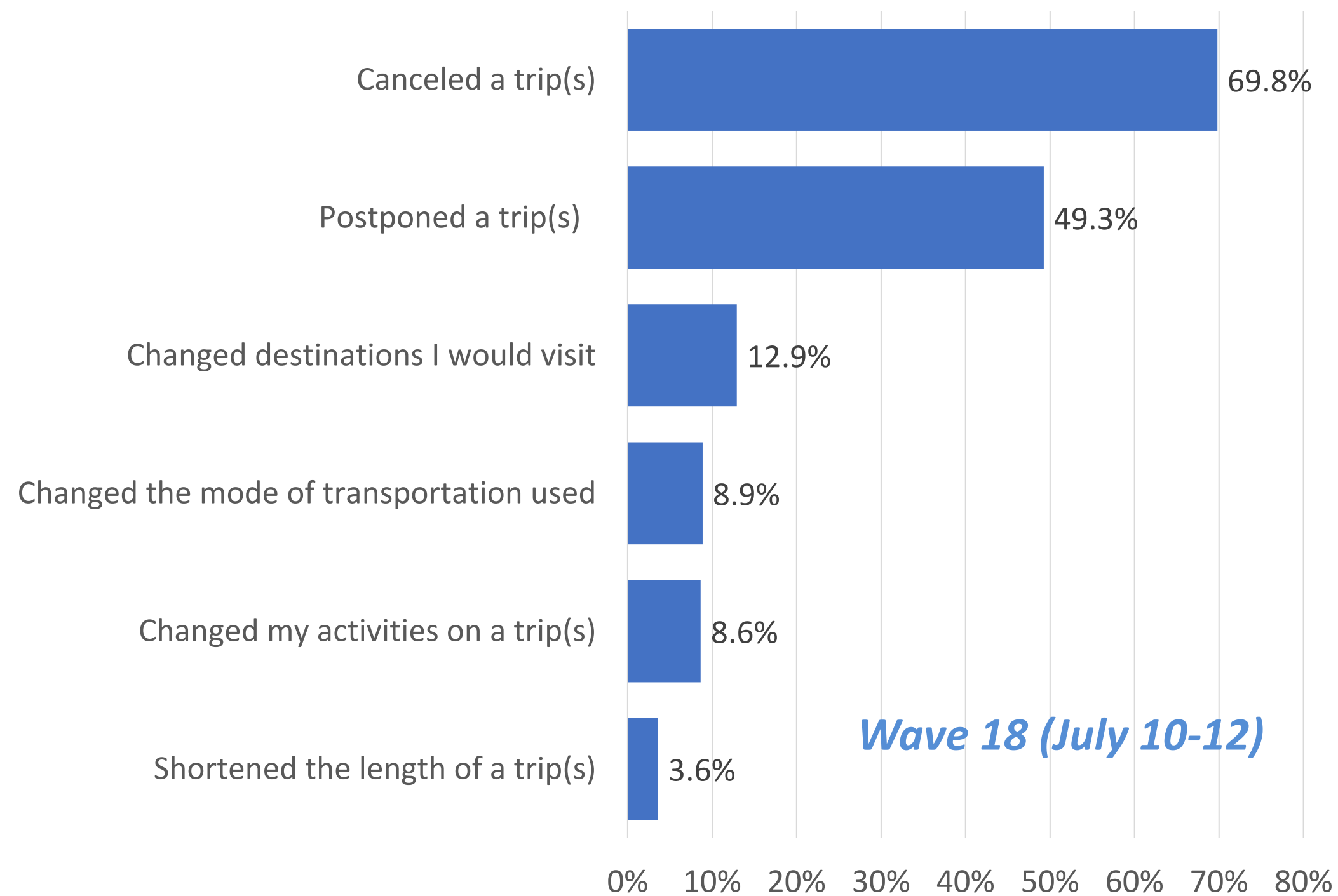
Historical data



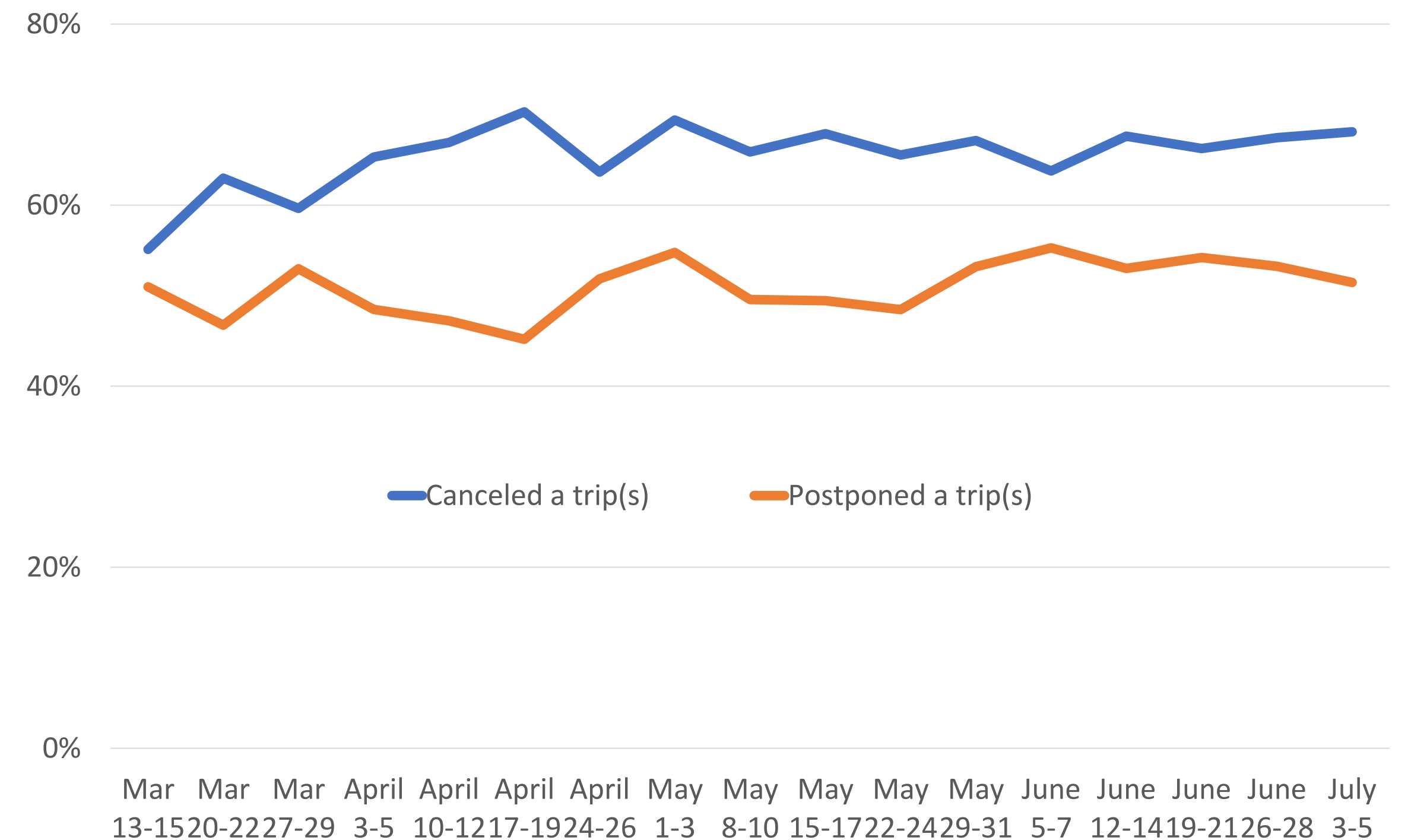
How the Coronavirus has Impacted Travel

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

Due to the coronavirus situation, I have _____.



Historical data

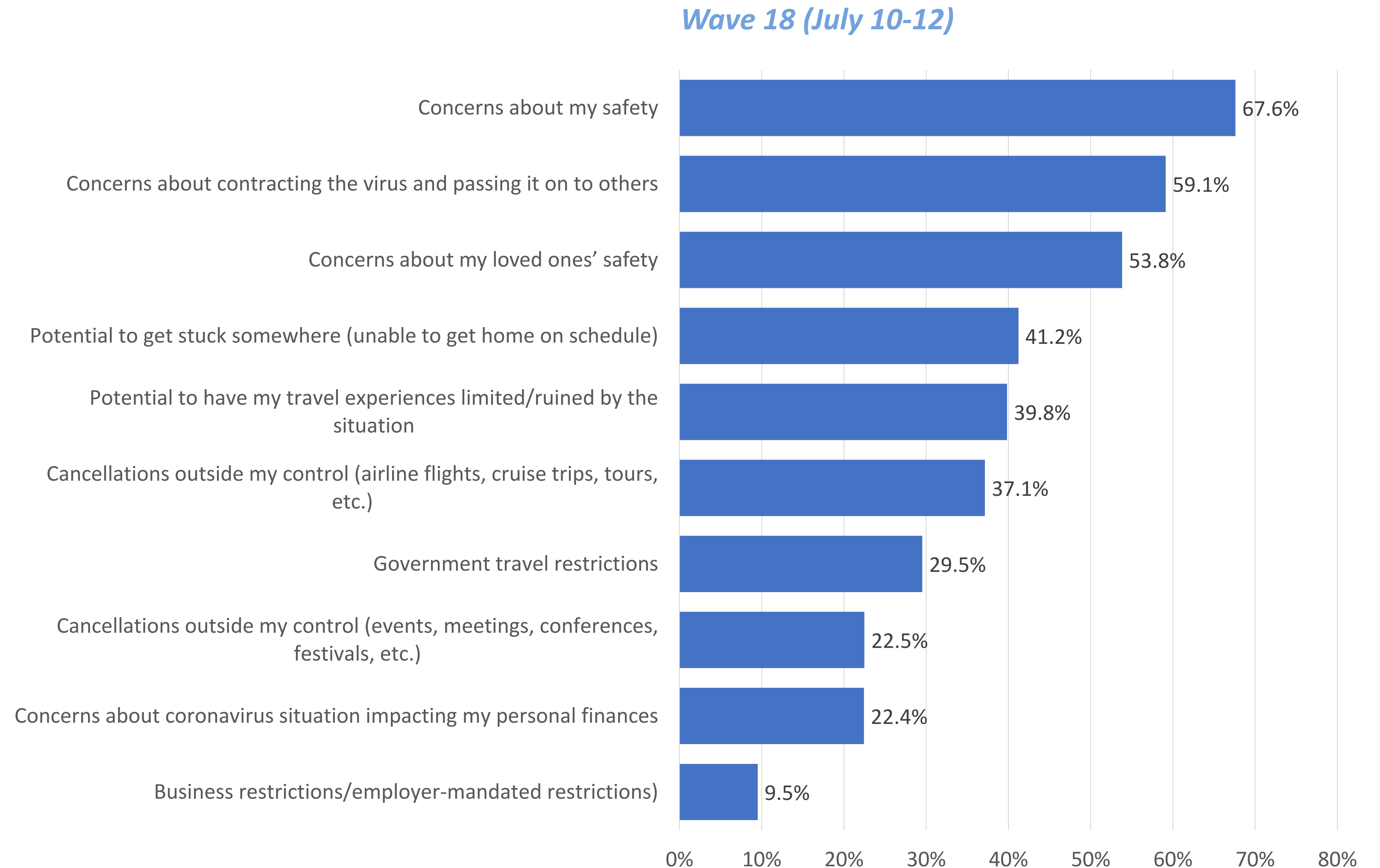


(Base: All respondents with travel impacted by the pandemic, 553, 770, 795, 890, 937, 929, 903, 926, 903, 871, 843, 993, 923, 952, 957, 974, 1,050 and 954 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

Why the Coronavirus is Impacting Travel

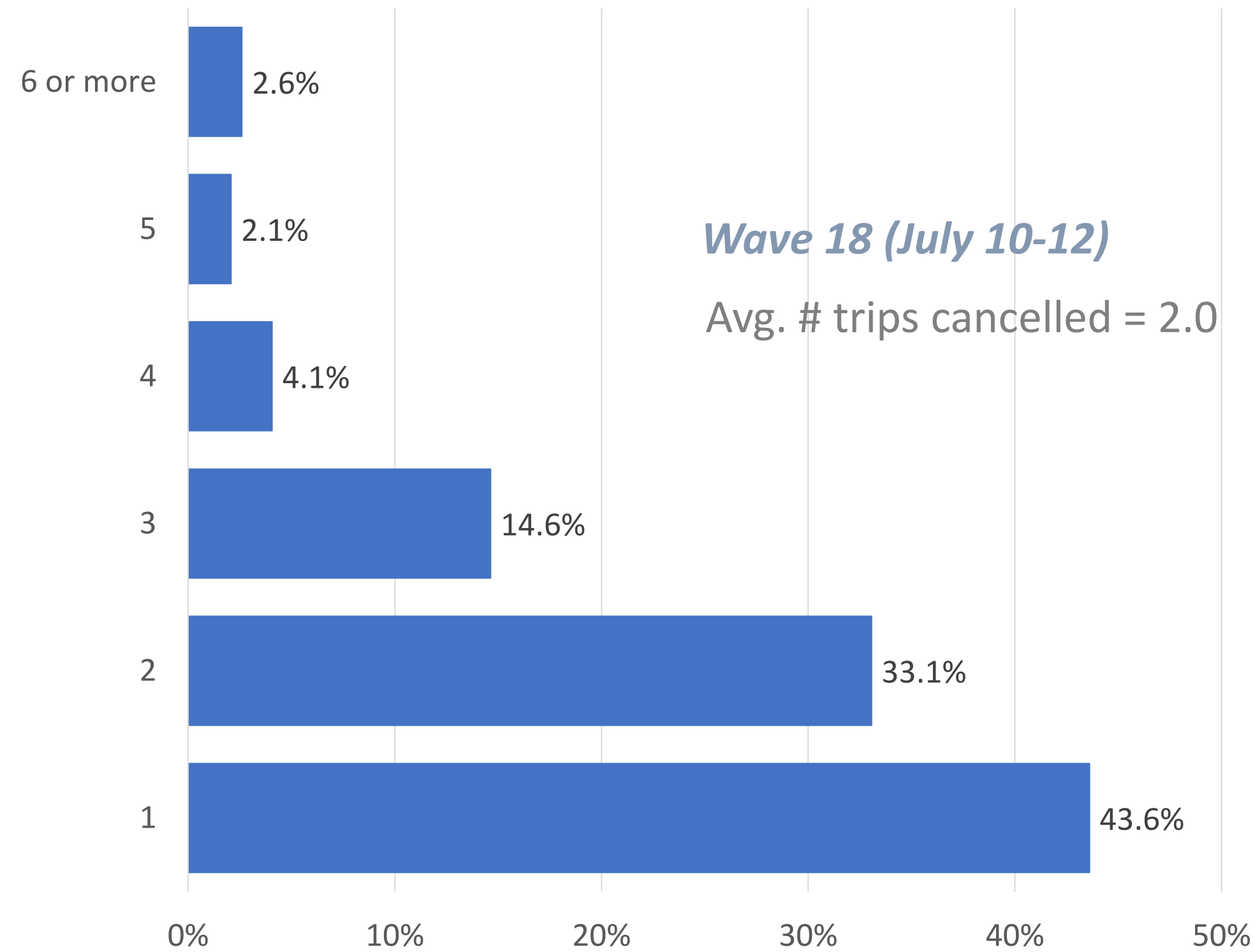
Question: Which of the following are reasons the coronavirus situation has changed your travels?

(Base: Wave 18. Respondents whose travel was impacted by the coronavirus, 953 completed surveys. Data collected July 10-12, 2020)

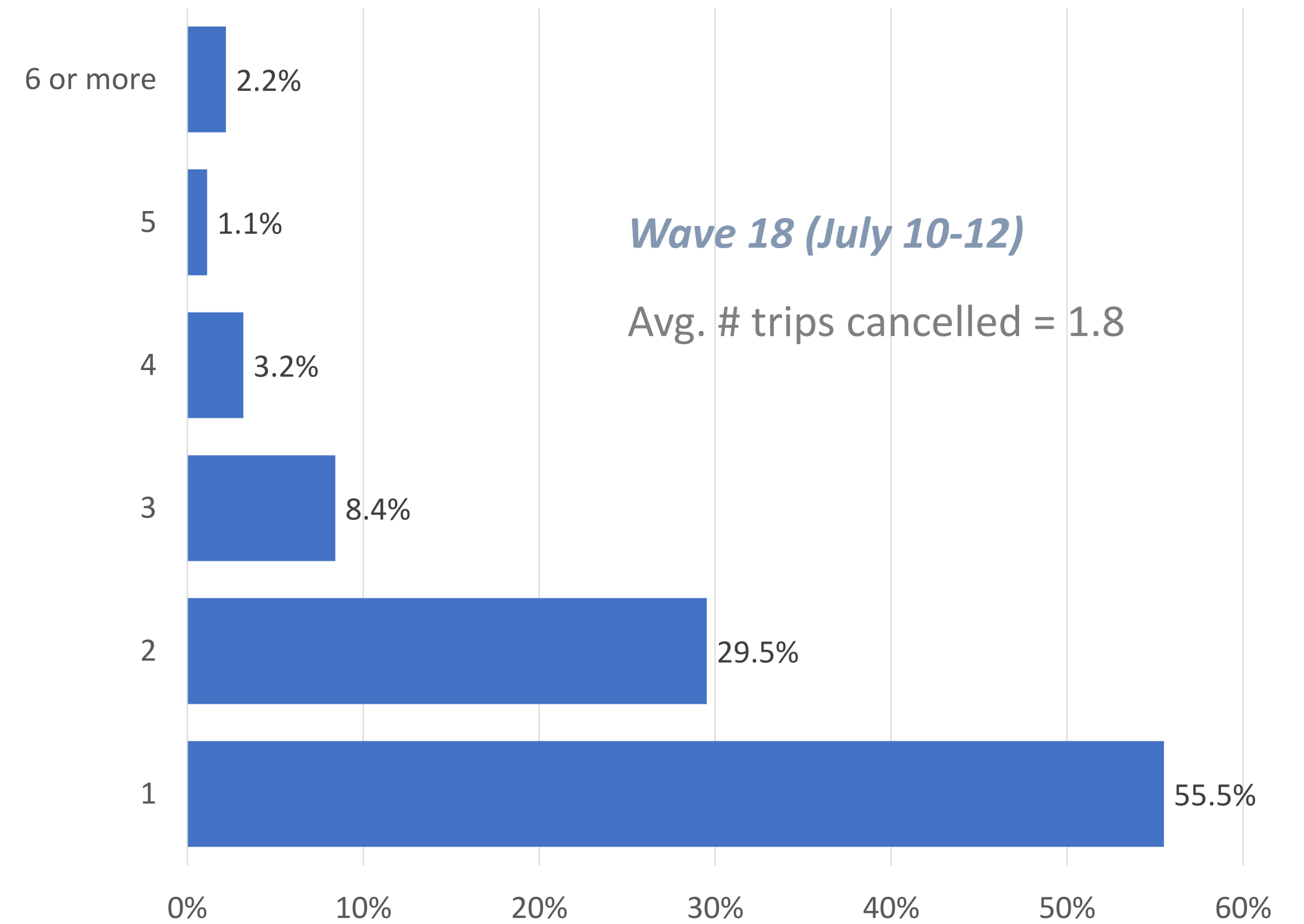


Trips Cancelled/Postponed

Question: How many trips did you cancel?



Question: How many trips did you postpone?

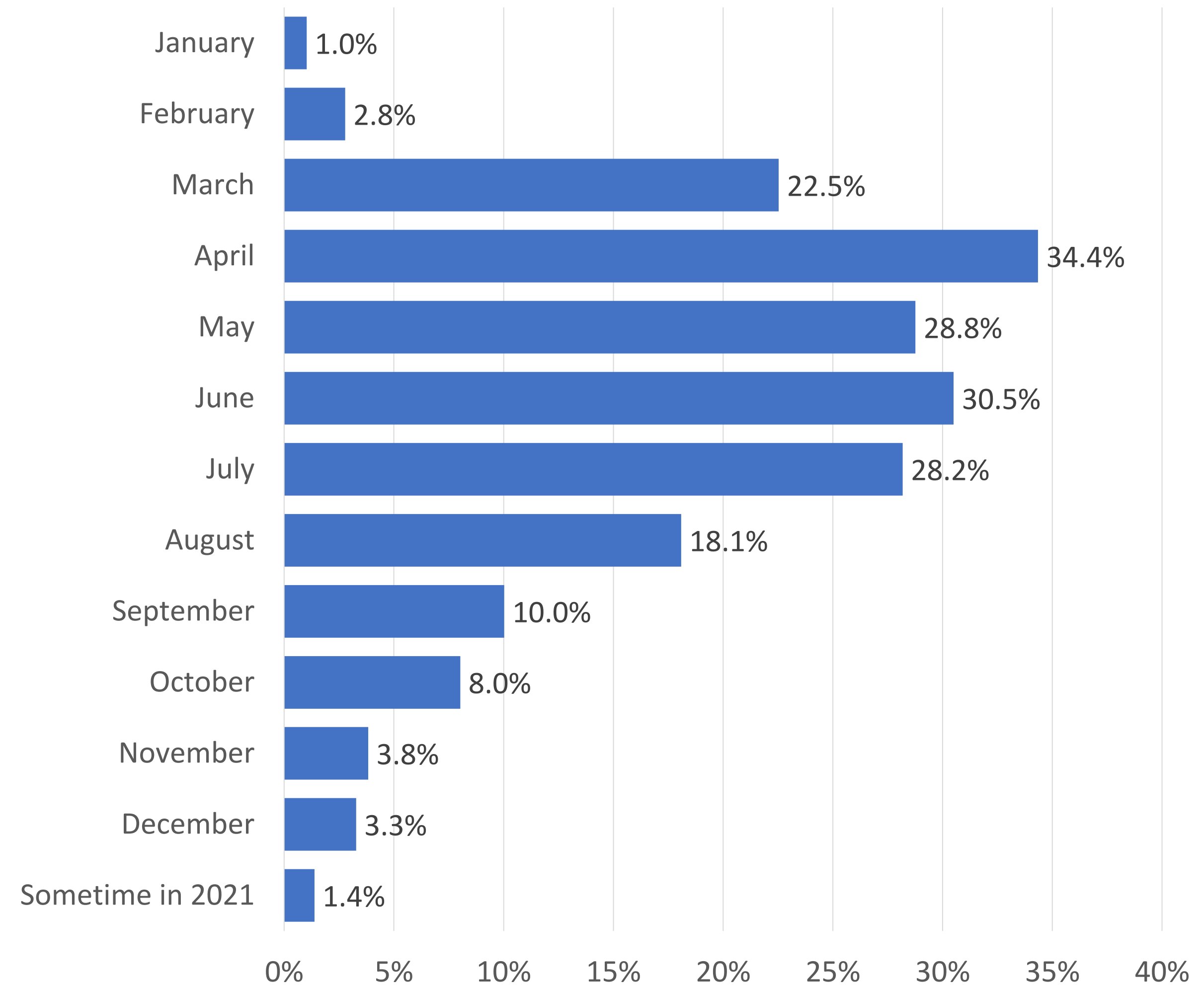


(Base: Wave 18, Respondents cancelling/postponing a trip, 675/468 completed surveys. Data collected July 10-12, 2020)

Month of Trip Cancellation

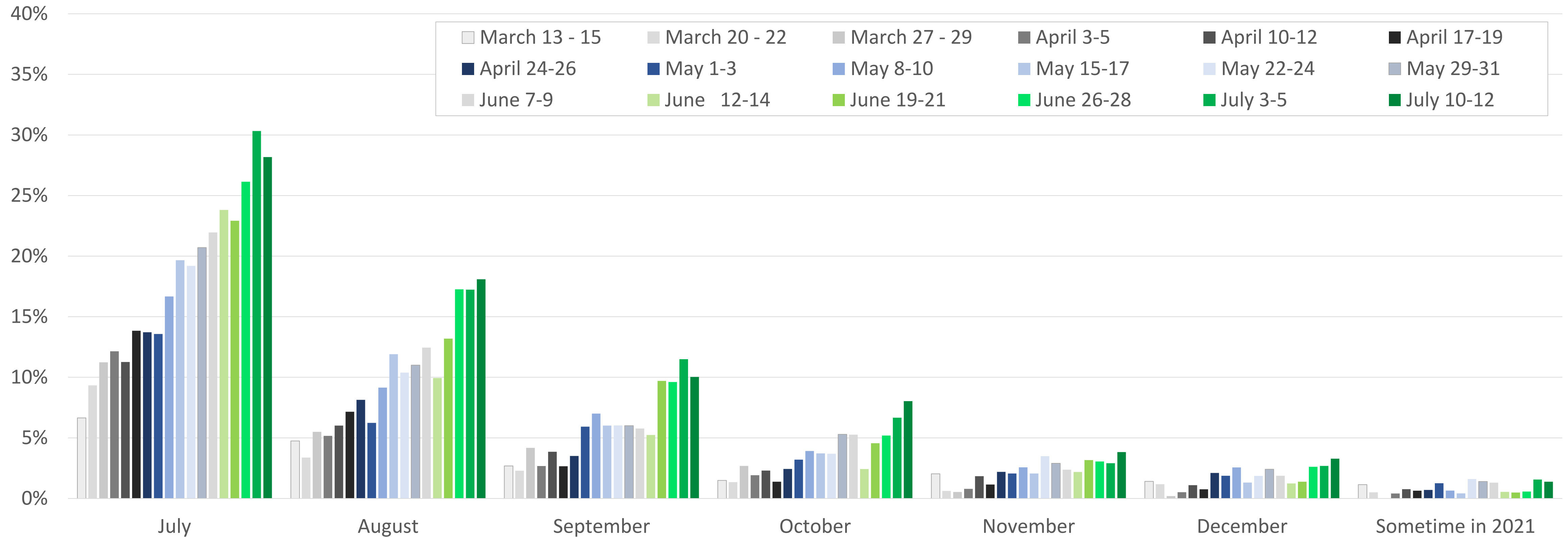
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(Base: Wave 18. Cancelling trips, 675 completed surveys. Data collected July 10-12, 2020)



Month of Trip Cancellation

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

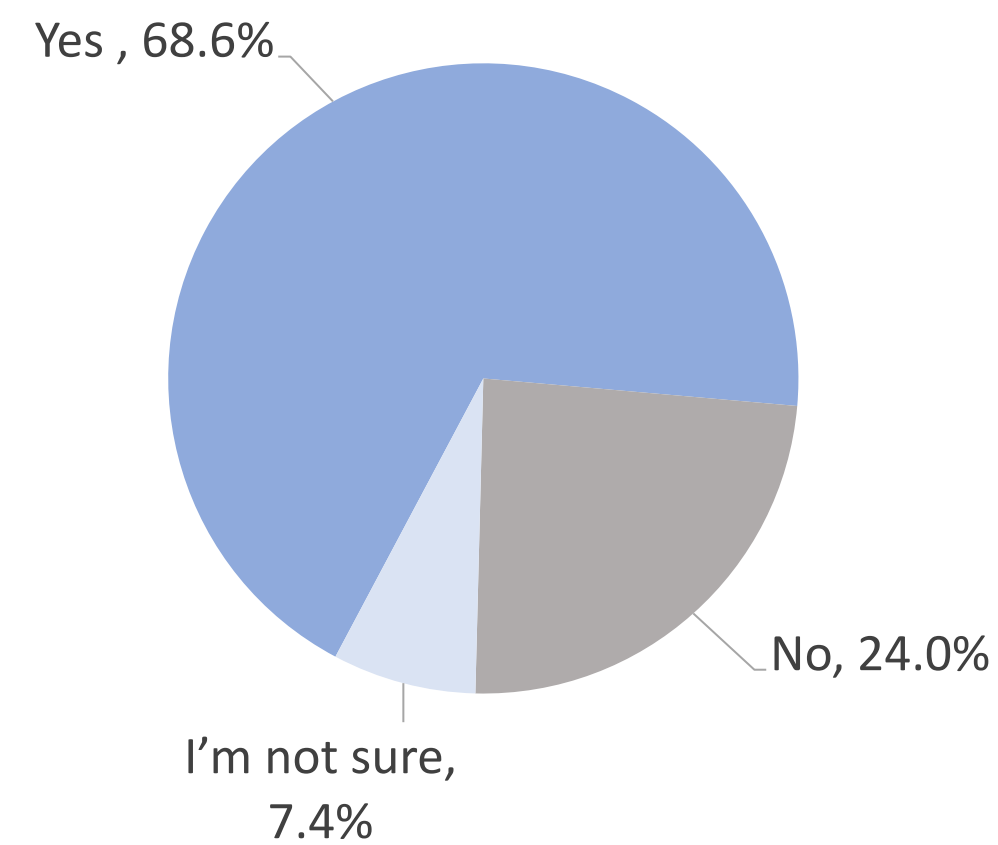


(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728 and 675 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

Did Traveler Get Full Refunds?

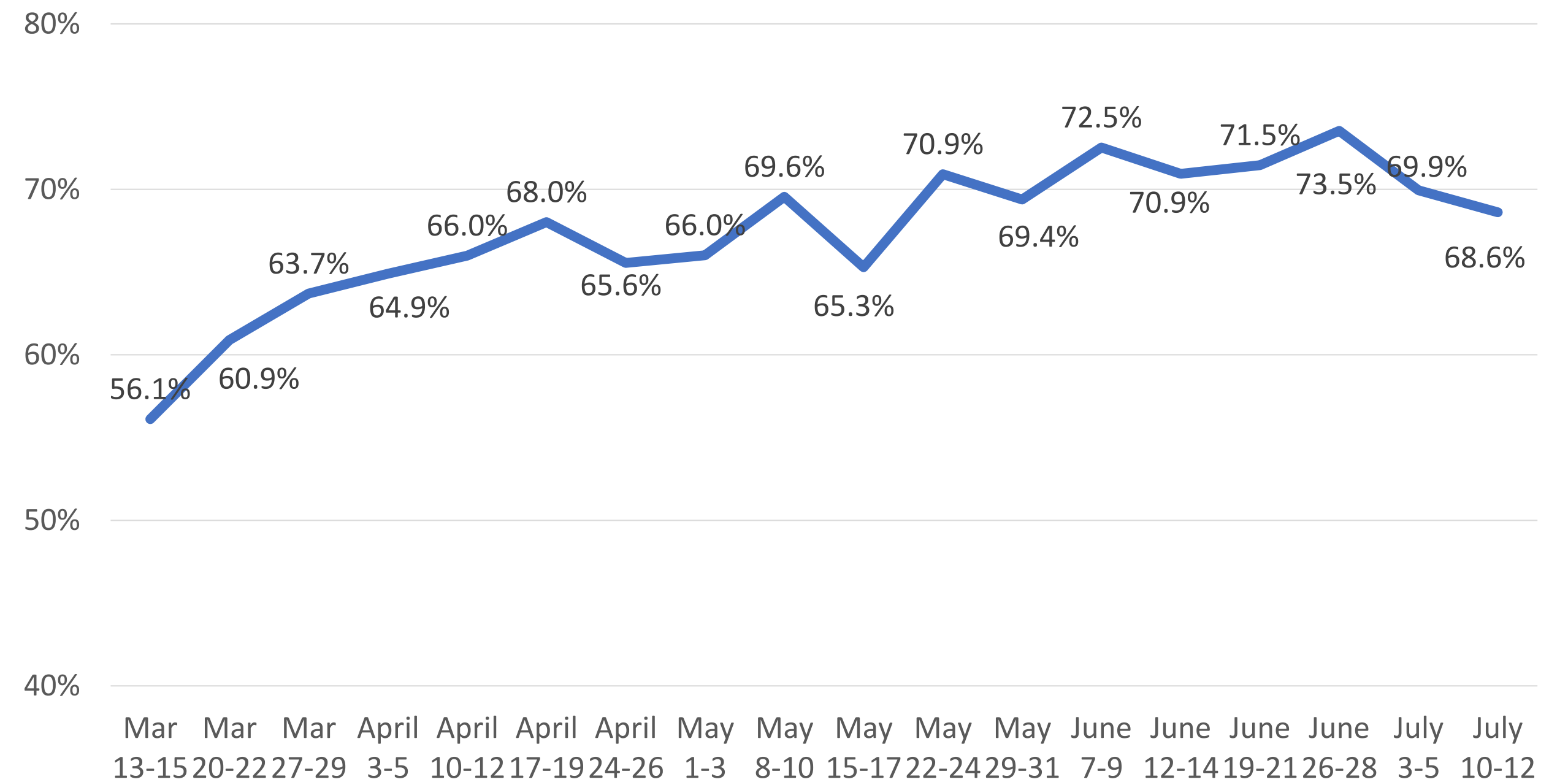
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 18 (July 10-12)



(Base: Wave 18. Cancelling trips, 675 completed surveys. Data collected July 10-12, 2020)

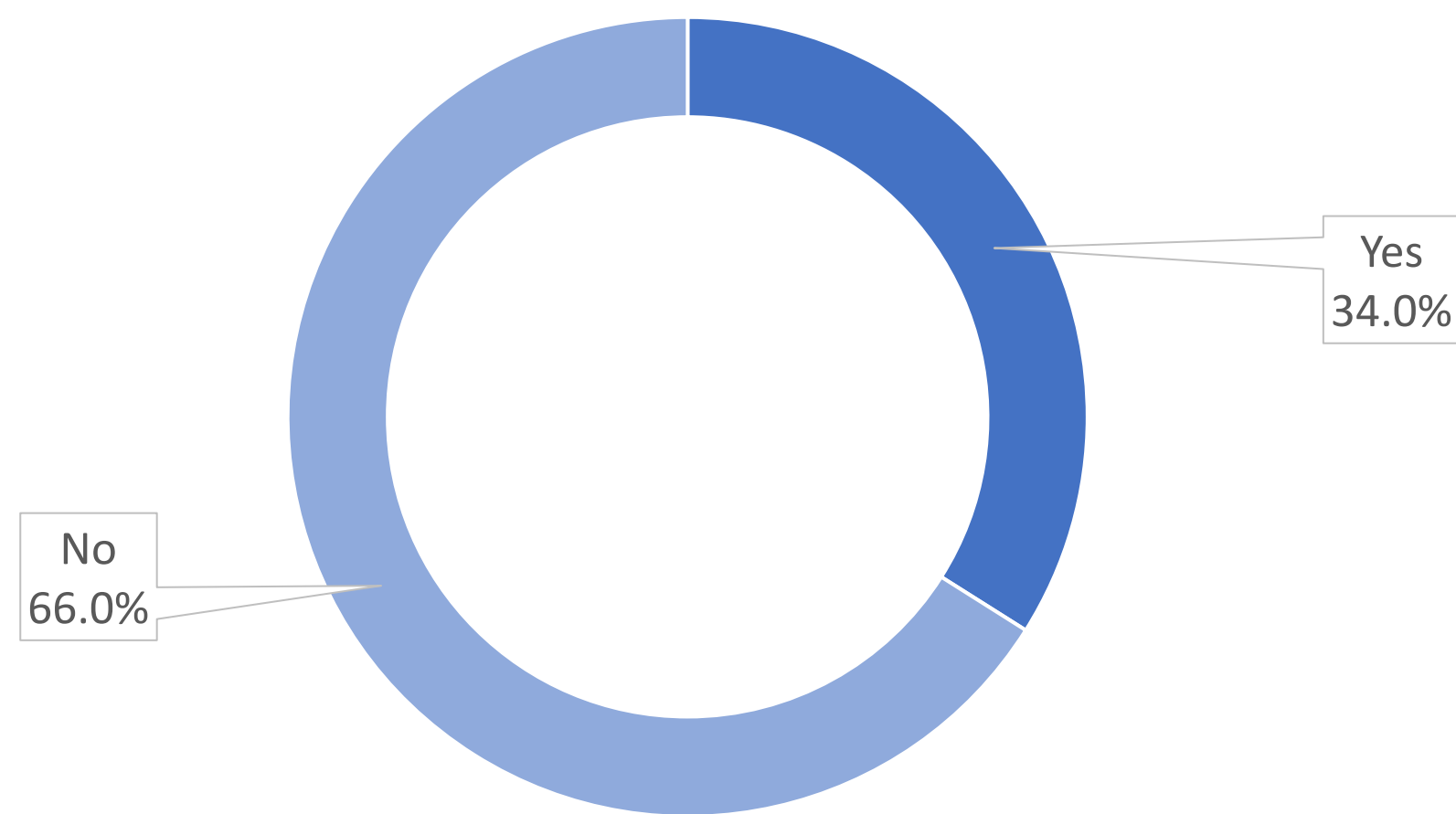
Historical data



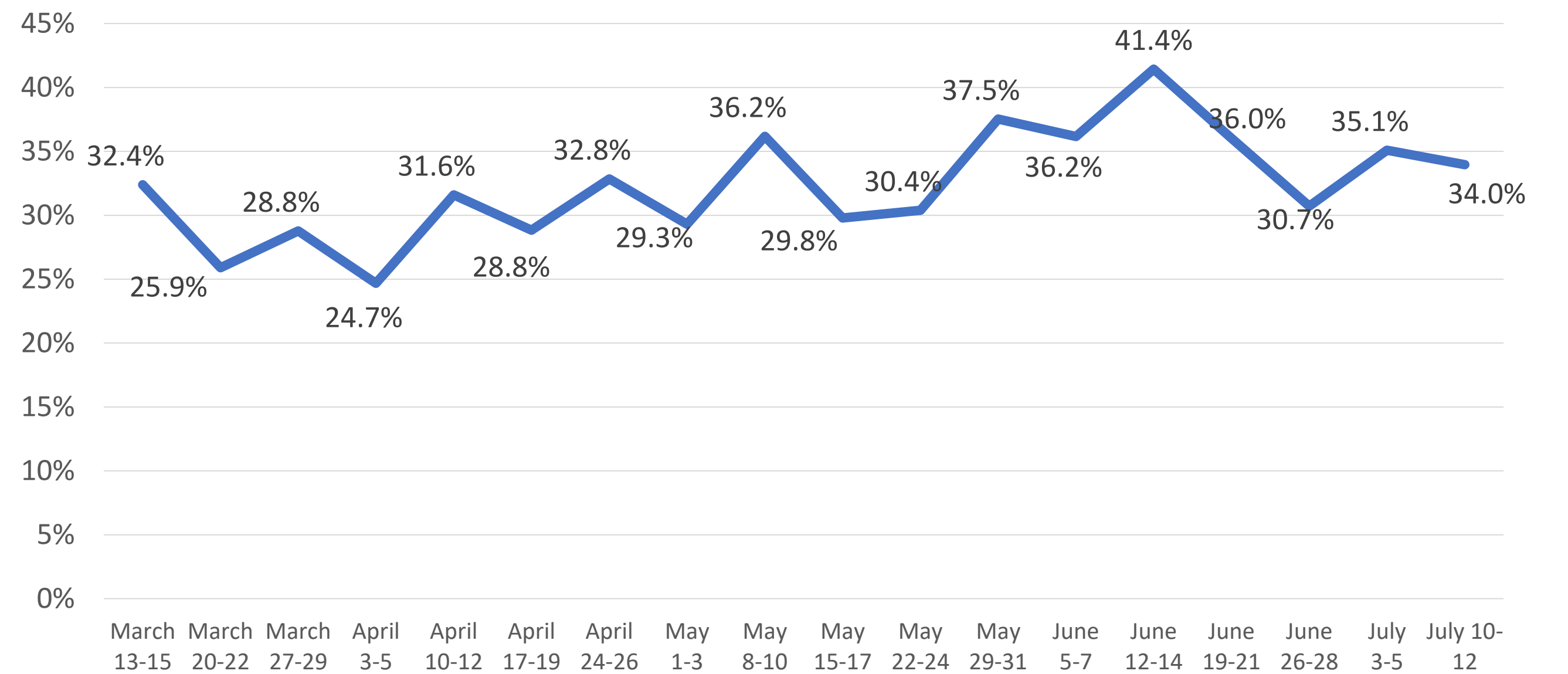
Were Postponed Trips Rescheduled?

Question: You said earlier that you had **POSTPONED** at least one trip. Have you rescheduled a date (even tentatively) for this travel?

Wave 18 (July 10-12)



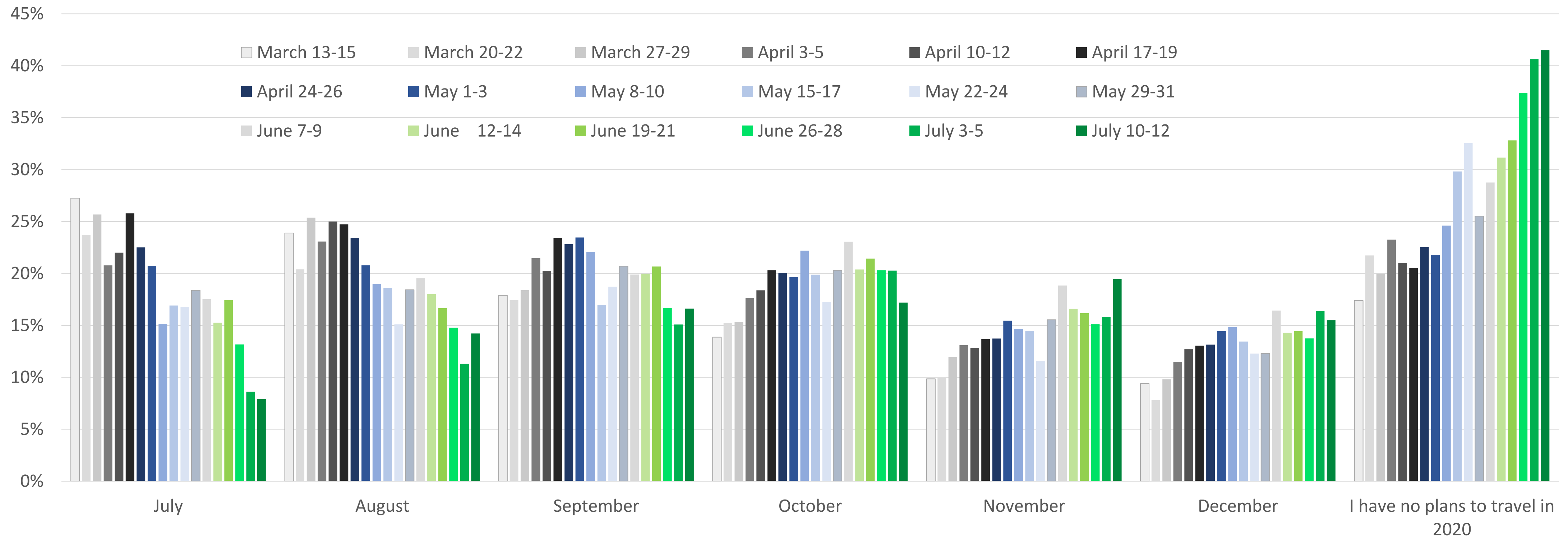
Historical data



(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463, 506, 442, 434, 413, 535, 498, 495, 517, 529, 535 and 467 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, July 3-5 and 10-12, 2020)

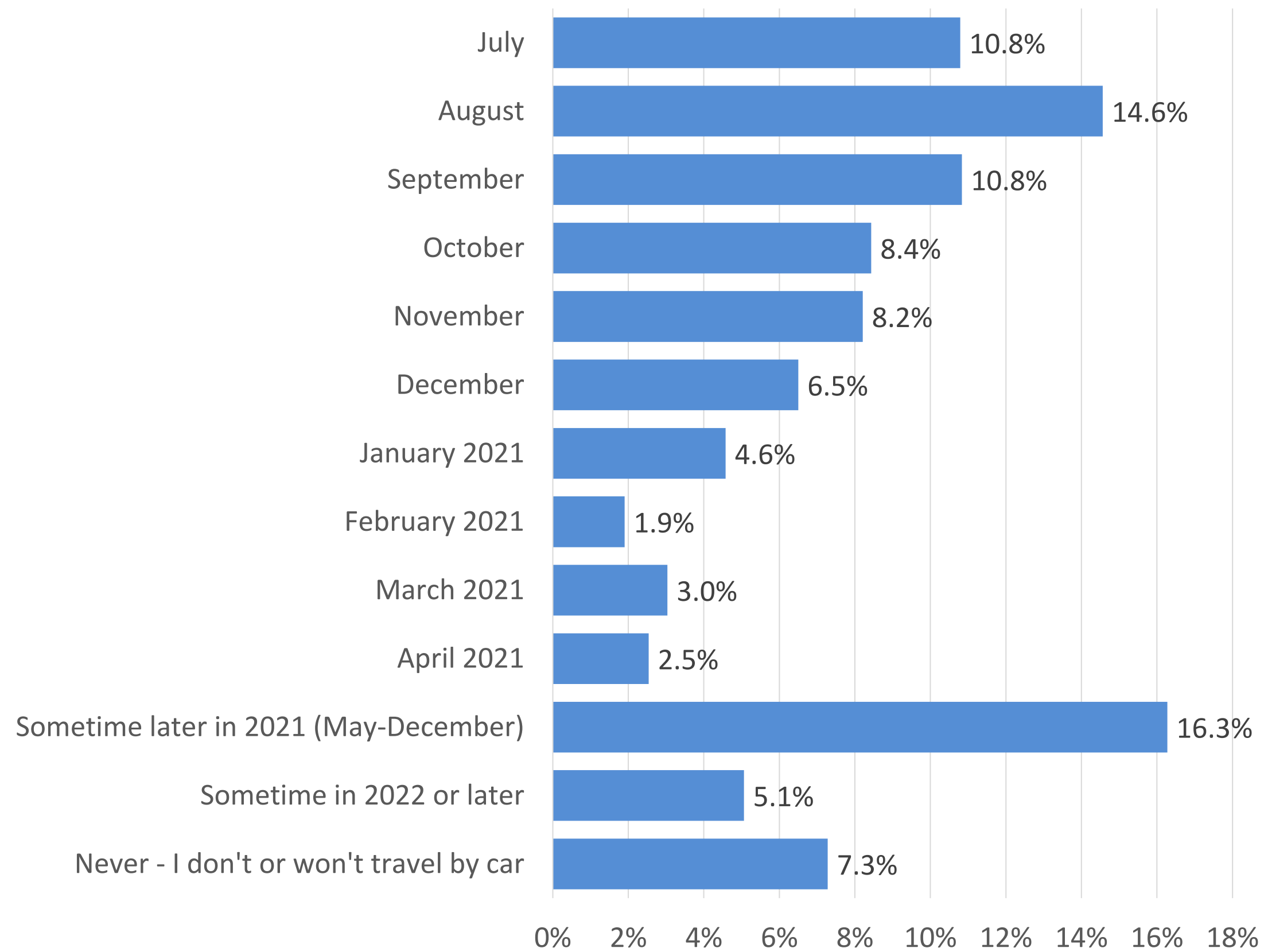
Upcoming Travel Plans

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

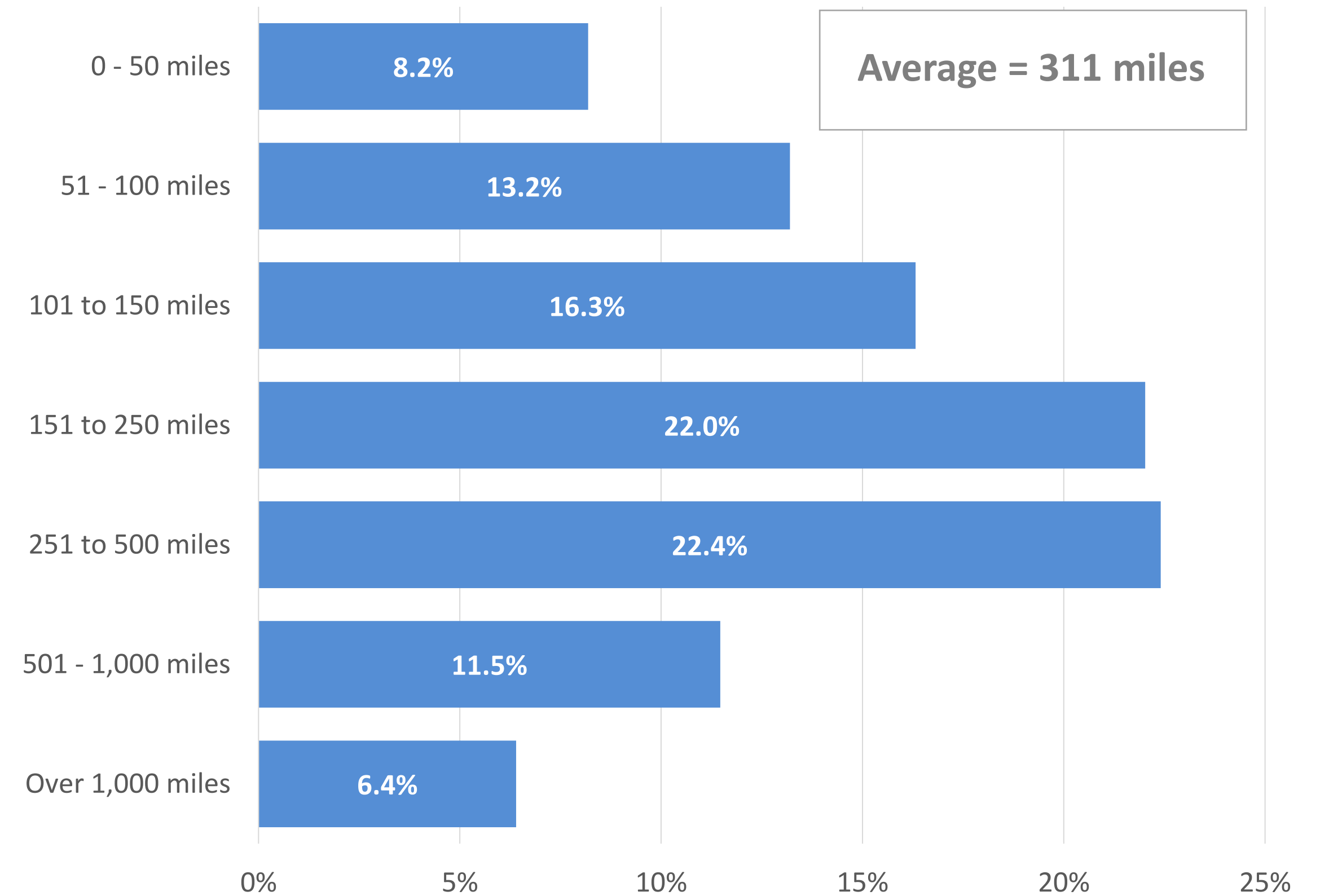


Road Trips Expected

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

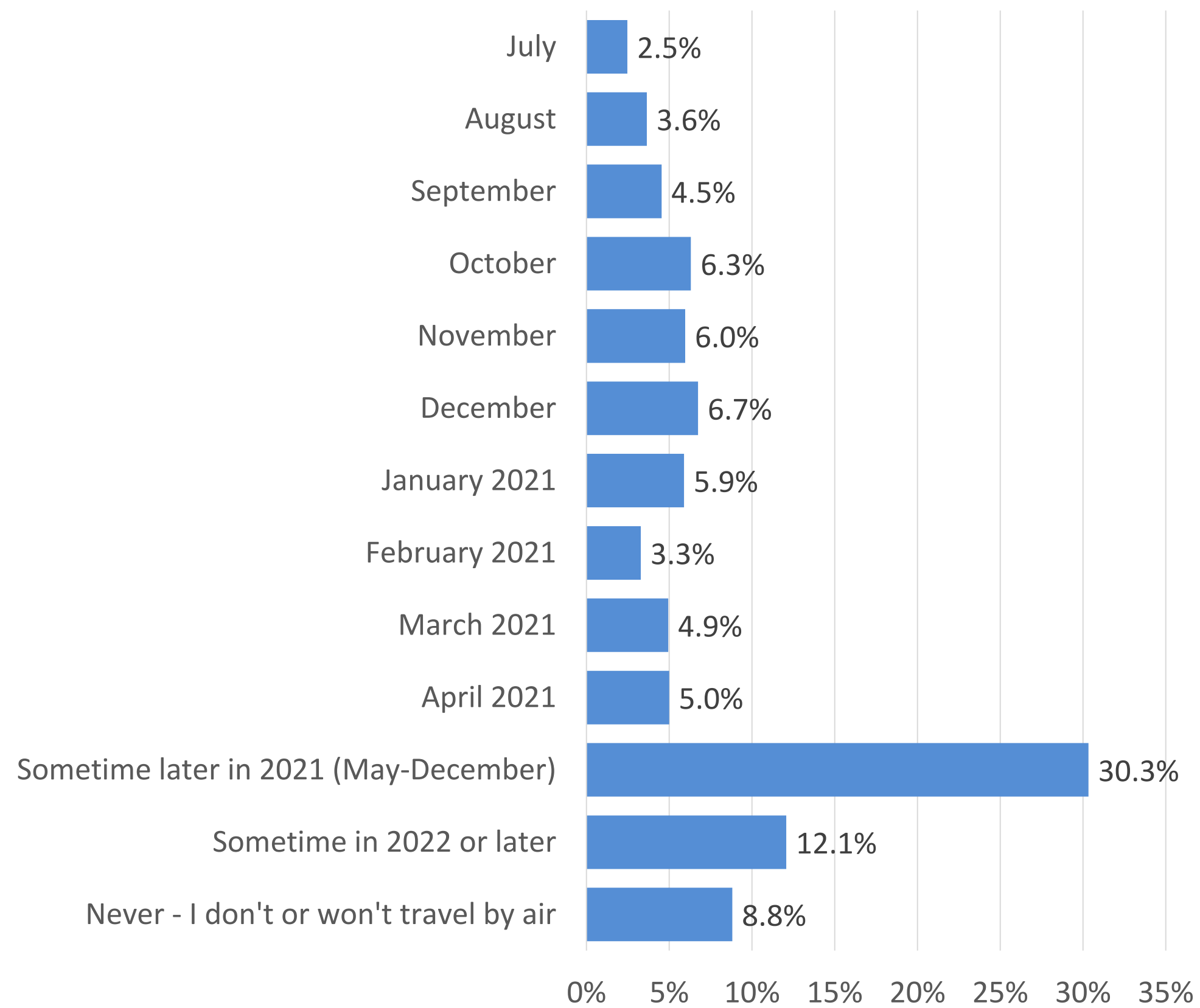


Question: On your next ROAD TRIP, how far away from home will be likely you travel?

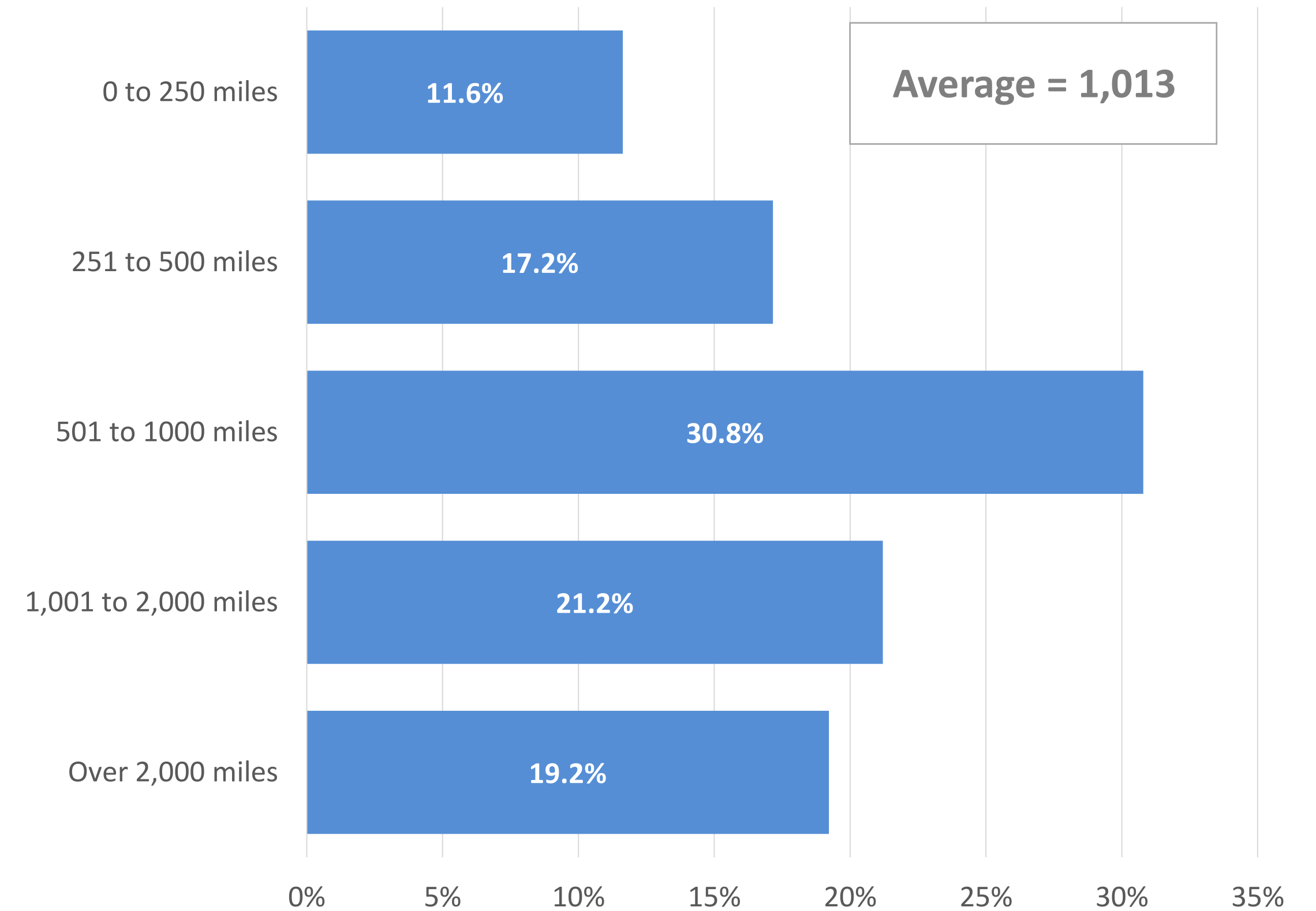


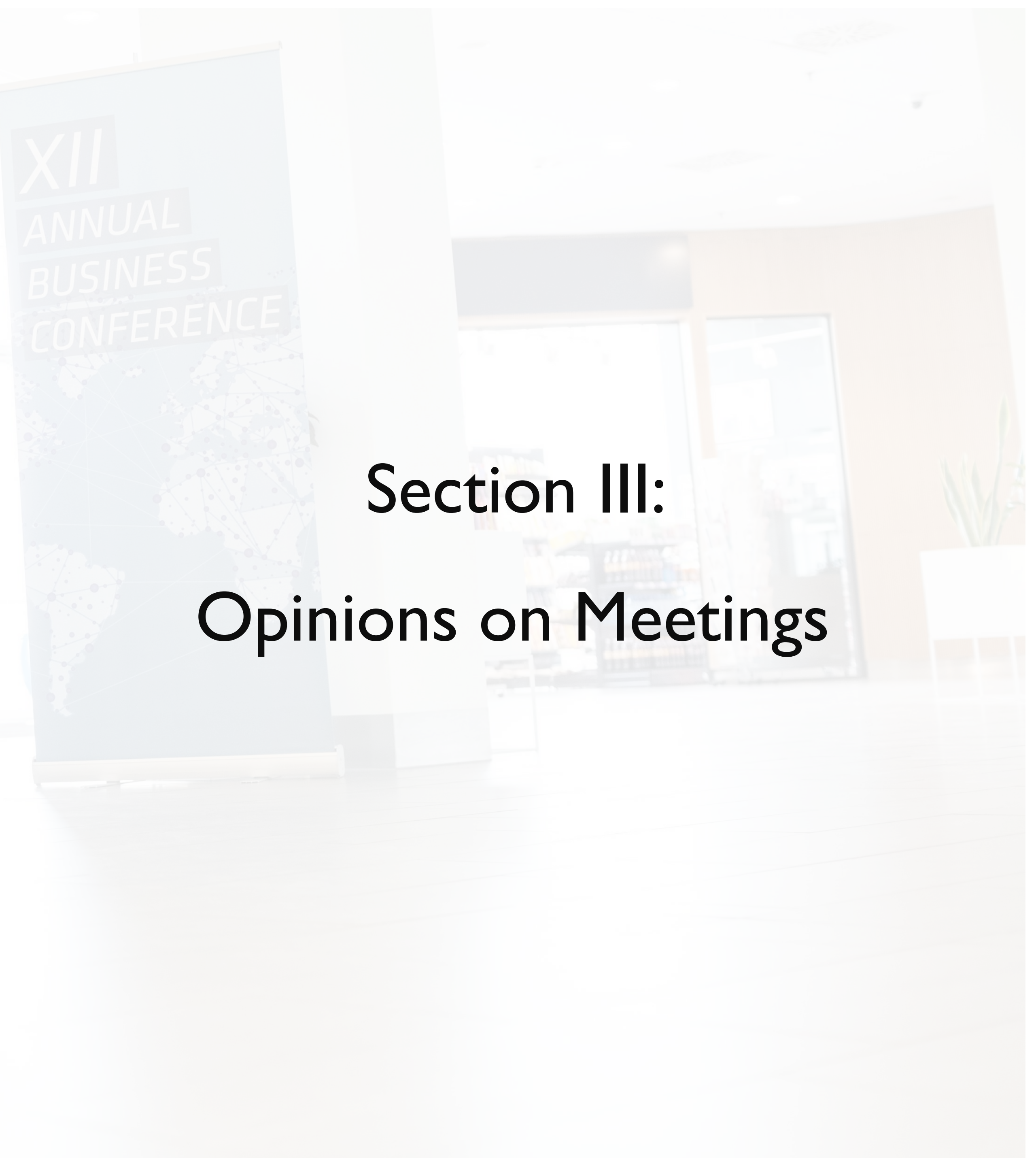
Commercial Airline Trips Expected

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?





XII
ANNUAL
BUSINESS
CONFERENCE

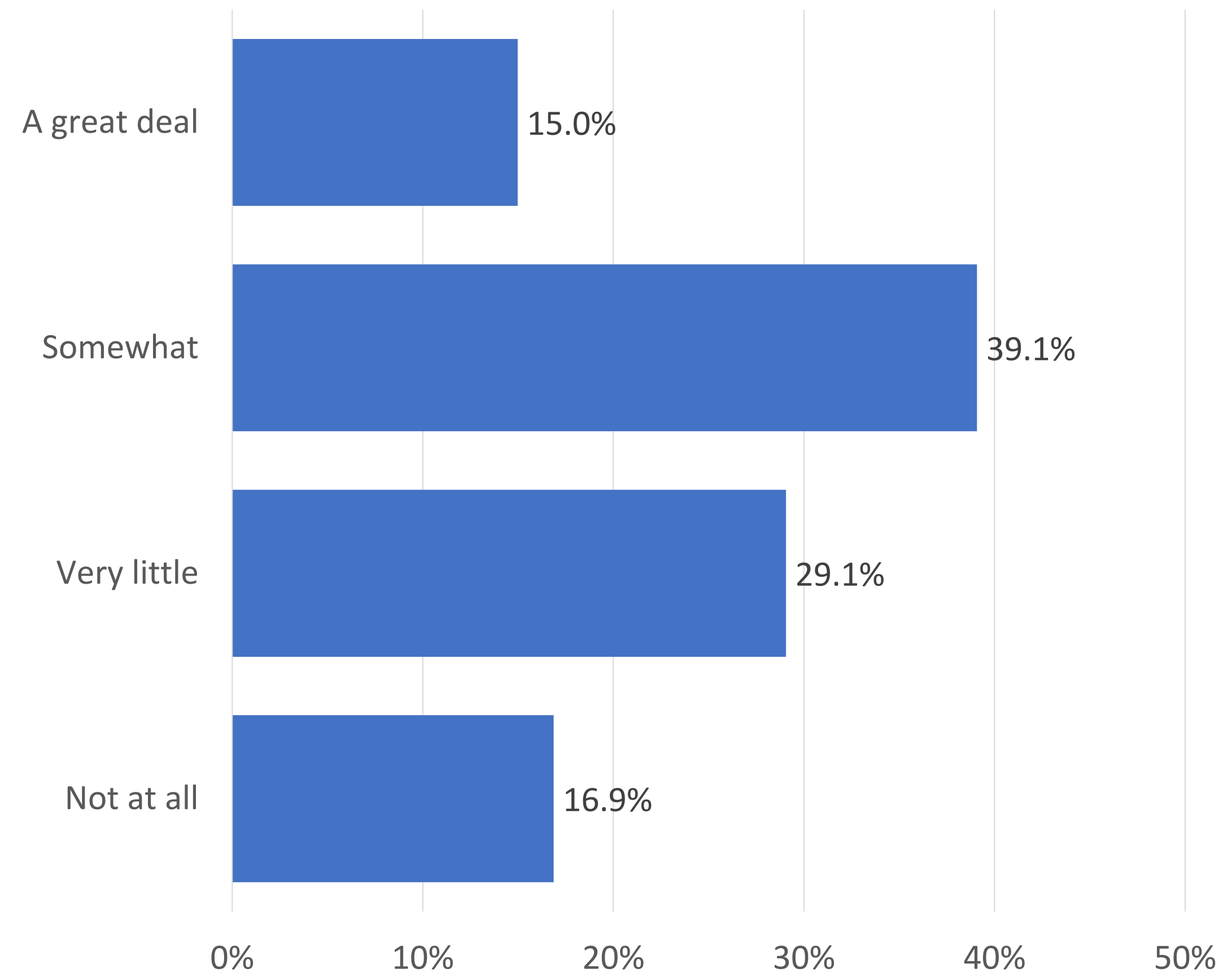
Section III: Opinions on Meetings

Trust: Other Attendees

Question: Suppose you were to attend a conference or convention sometime in the next year. In general, how much would you trust your fellow attendees to conduct themselves appropriately, doing what they can to protect other attendees from exposure to the COVID-19 virus?

I trust my fellow attendees

(Base: Wave 18 data. All respondents attending a conference or group meeting in the past 2 years, 377 completed surveys. Data collected July 10-12, 2020)

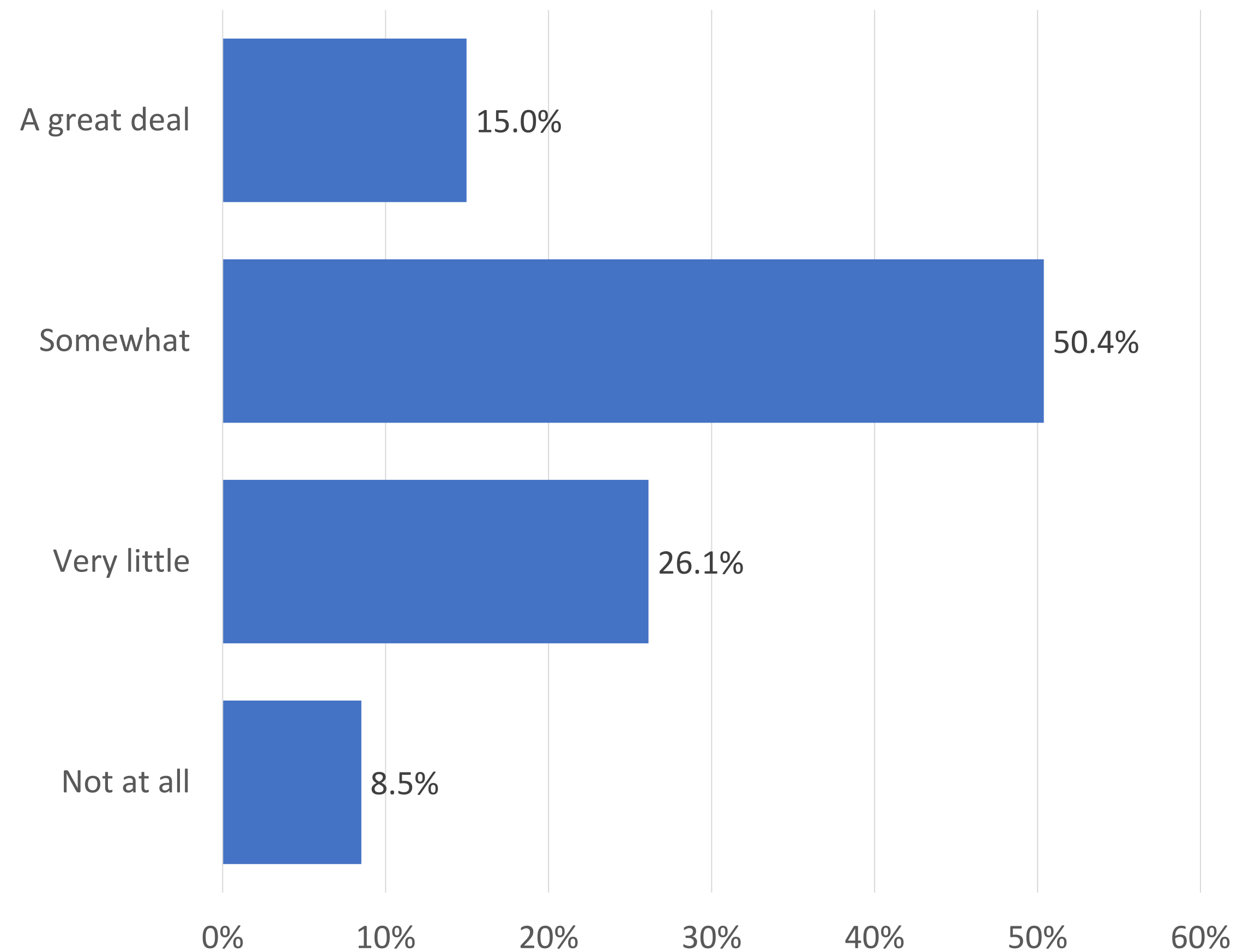


Trust: Meeting Organizers

Question: In general, how much would you trust the organization hosting the conference or convention to look out for your health?

I would trust the hosting organization

(Base: Wave 18 data. All respondents attending a conference or group meeting in the past 2 years, 376 completed surveys. Data collected July 10-12, 2020)

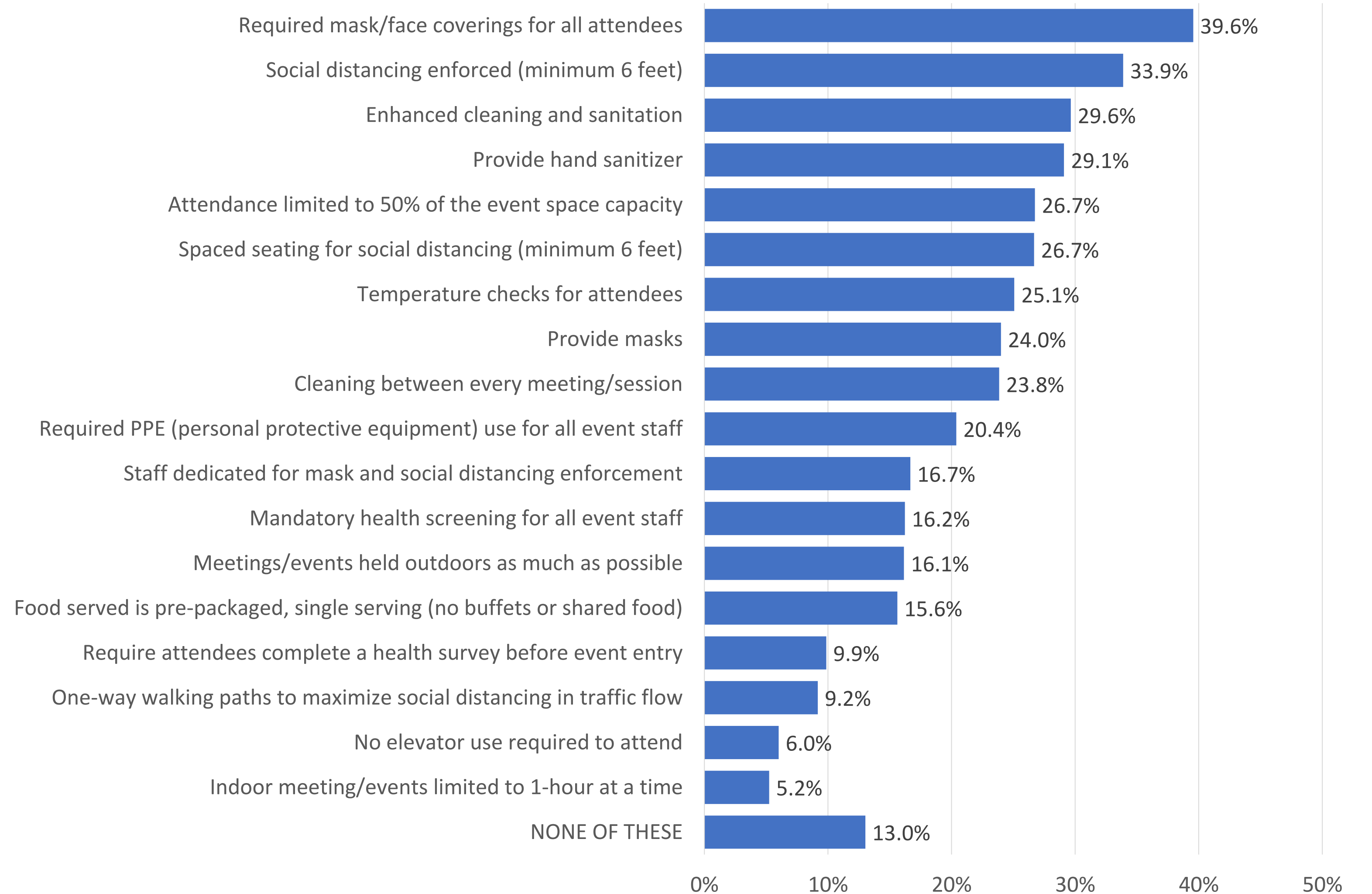


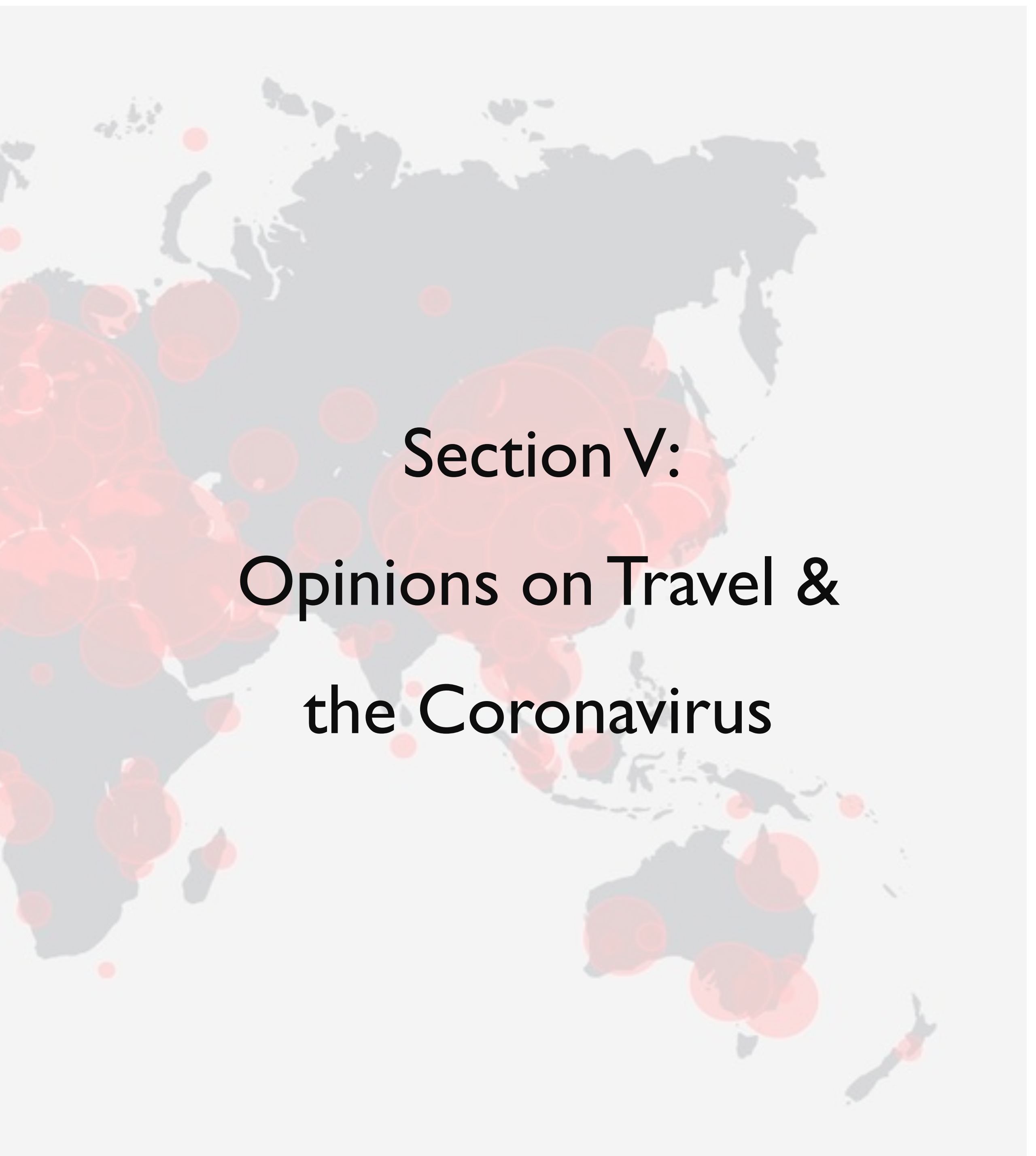
Desired Safety Protocols at Conferences & Events

Question: When attending a live event or conference in the future, which operational practices would make you feel most confident that the organization hosting the conference/event is looking after your health?

(PLEASE SELECT AT MOST FIVE)

(Base: Wave 18 data. All respondents, 1,213 completed surveys. Data collected July 10-12, 2020)



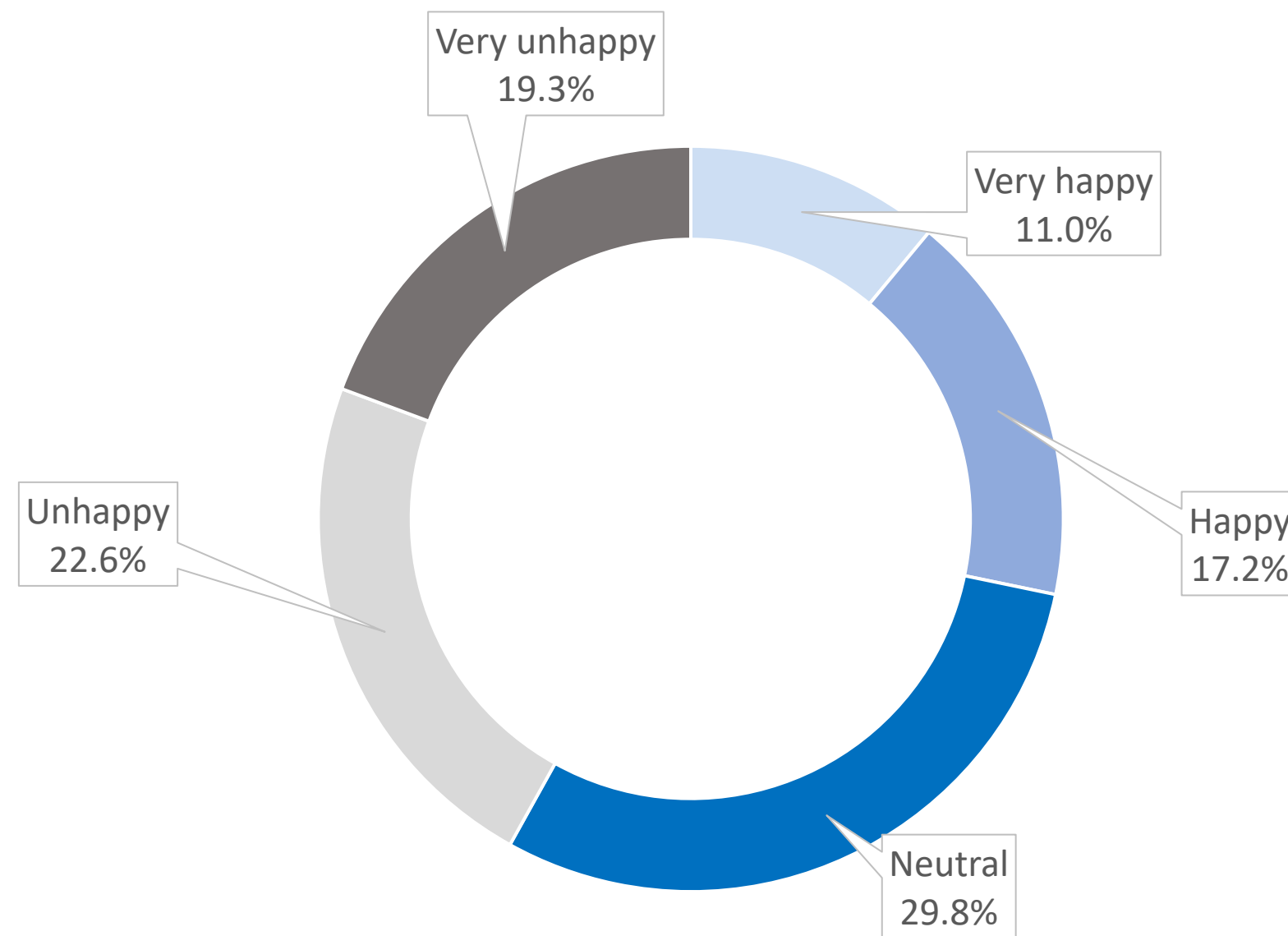


Section V:
Opinions on Travel &
the Coronavirus

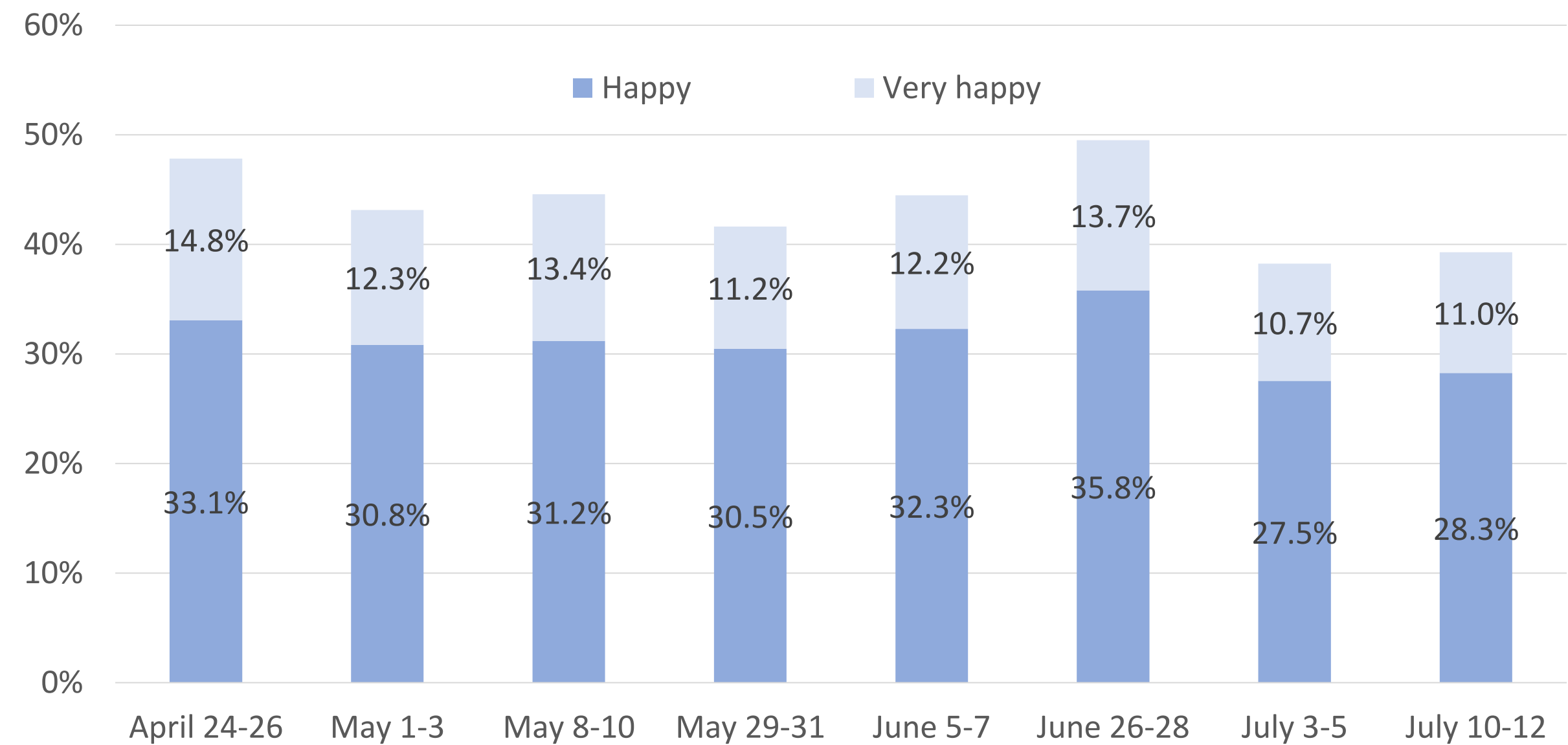
Advertising Their Own Communities

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?

Wave 18 (July 10-12)



Historical data

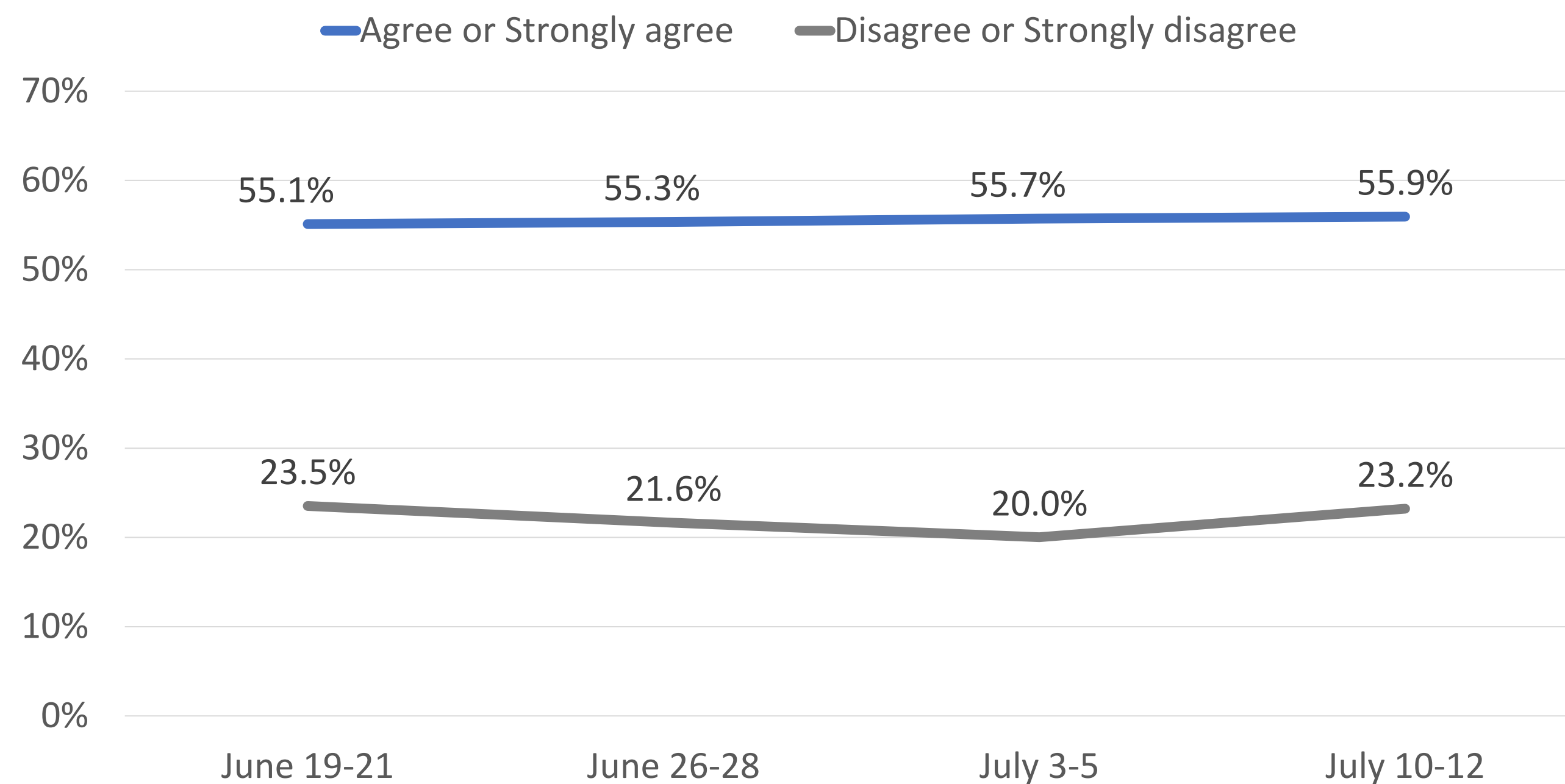
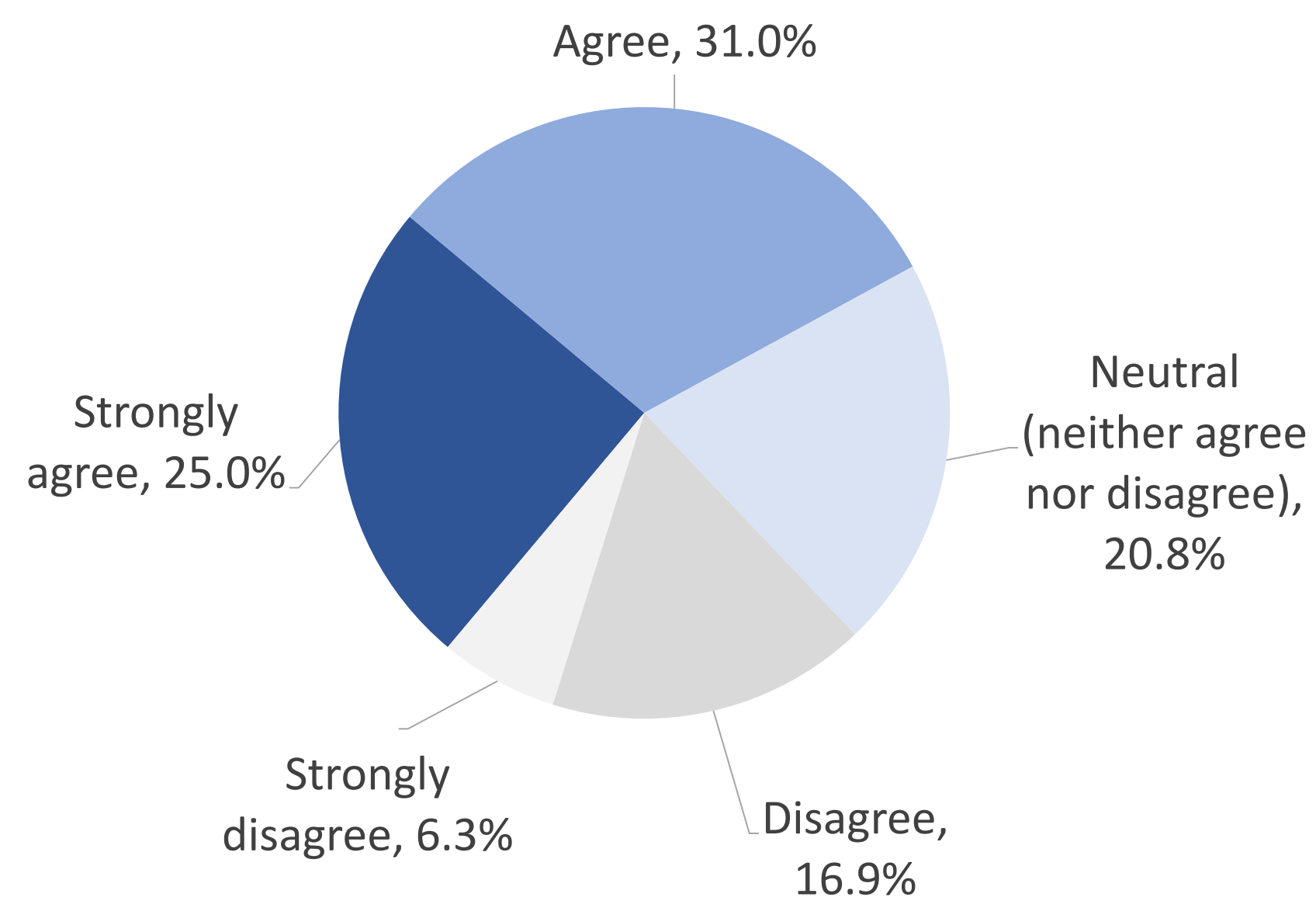


(Base: All respondents, 1,198, 1,199, 1,195, 1,250, 1,203, 1,231, 1,365 and 1,213 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28, July 3-5 and 10-12, 2020)

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.

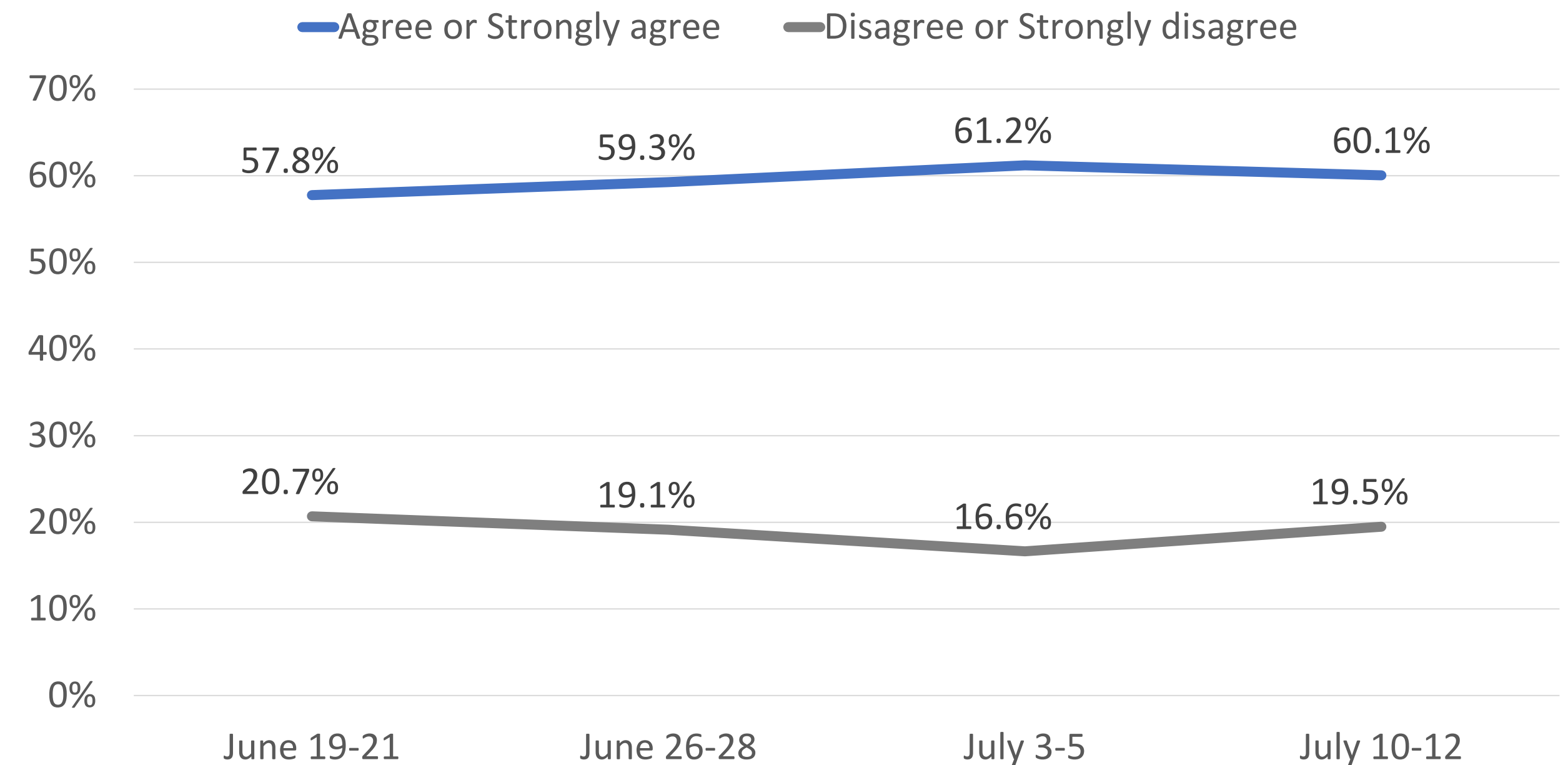
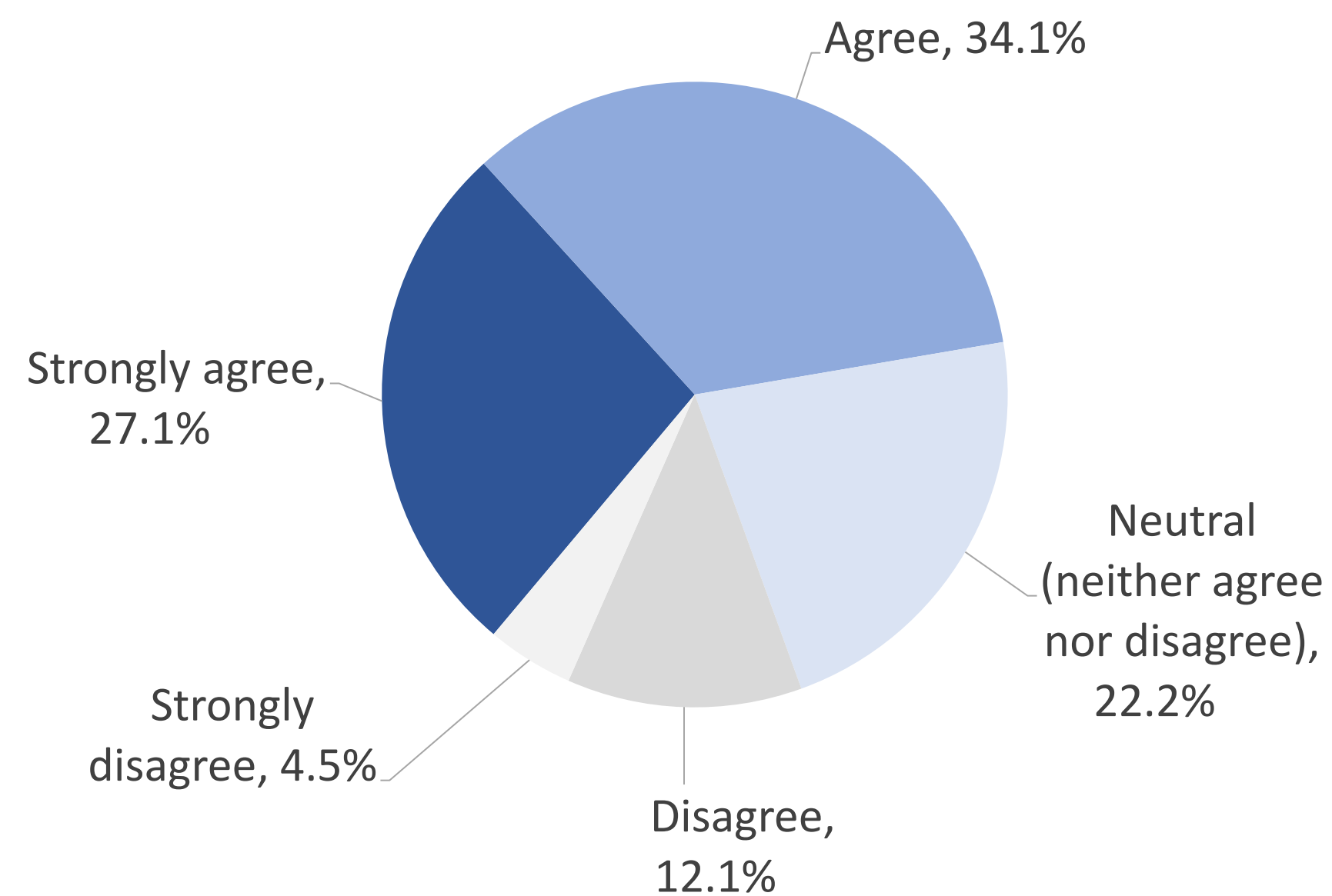


(Base: All respondents, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected June 19-21, 26-28, July 3-5 and 10-12, 2020)

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.

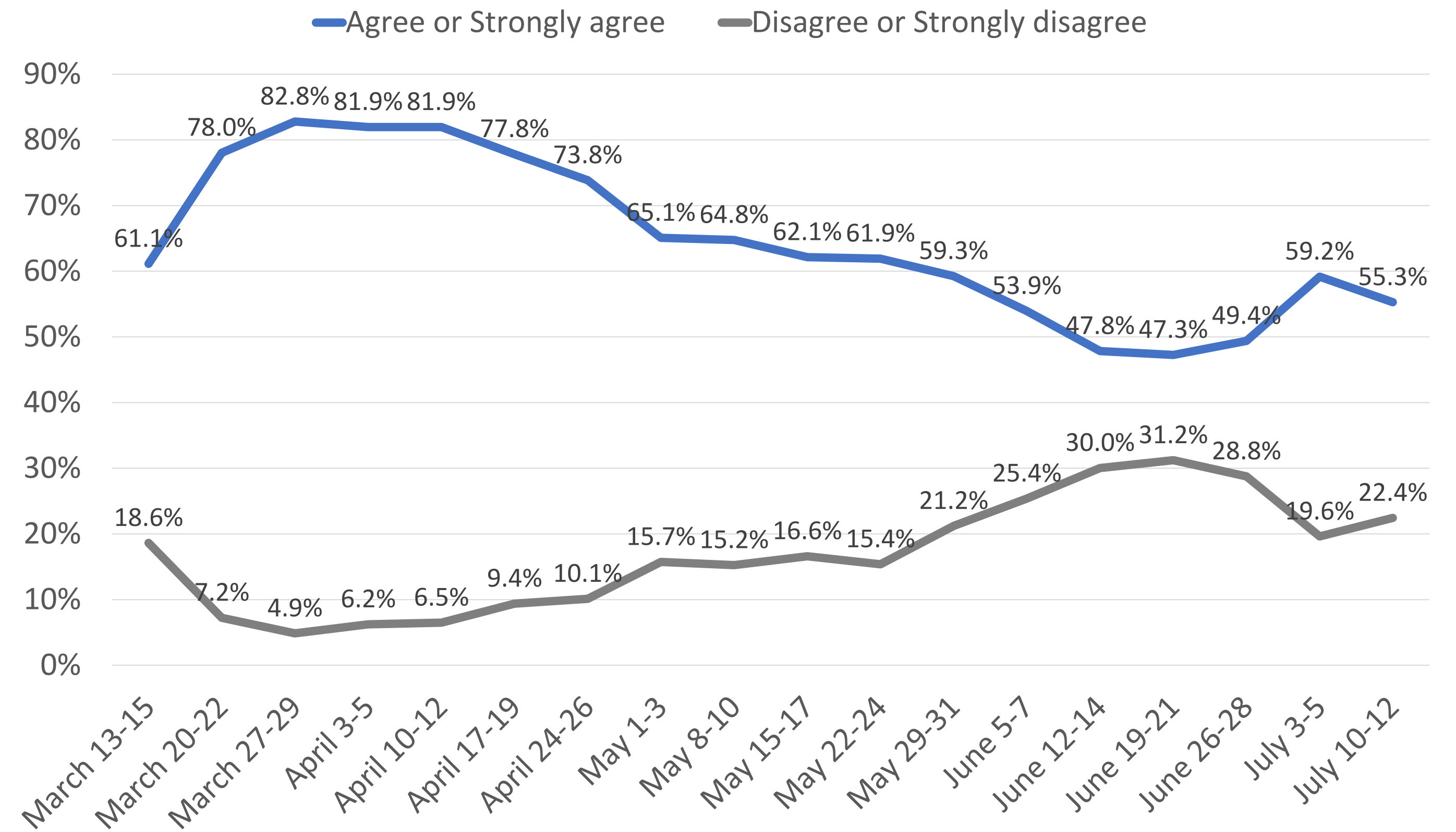
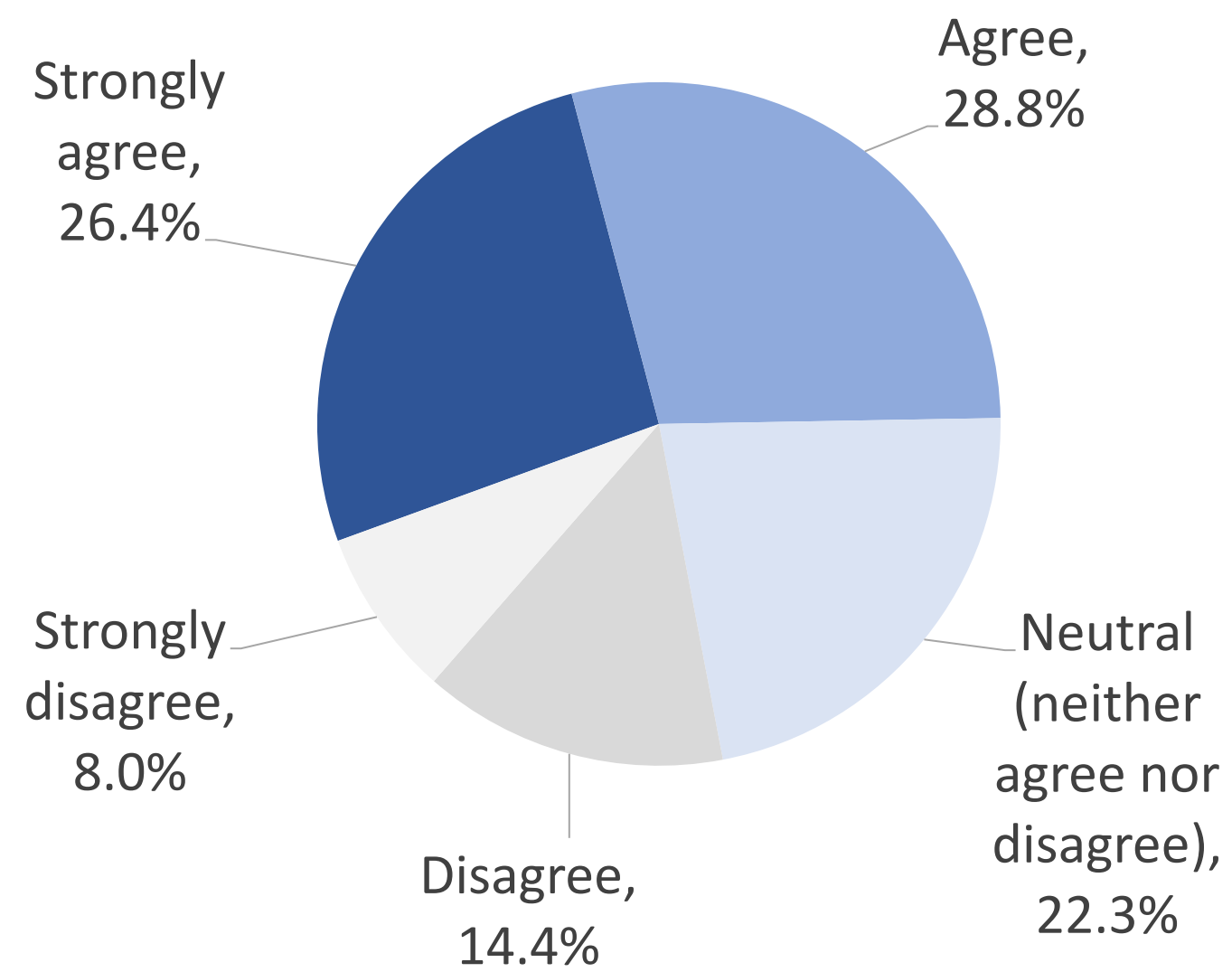


(Base: All respondents, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected June 19-21, 26-28, July 3-5 and 10-12, 2020)

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.

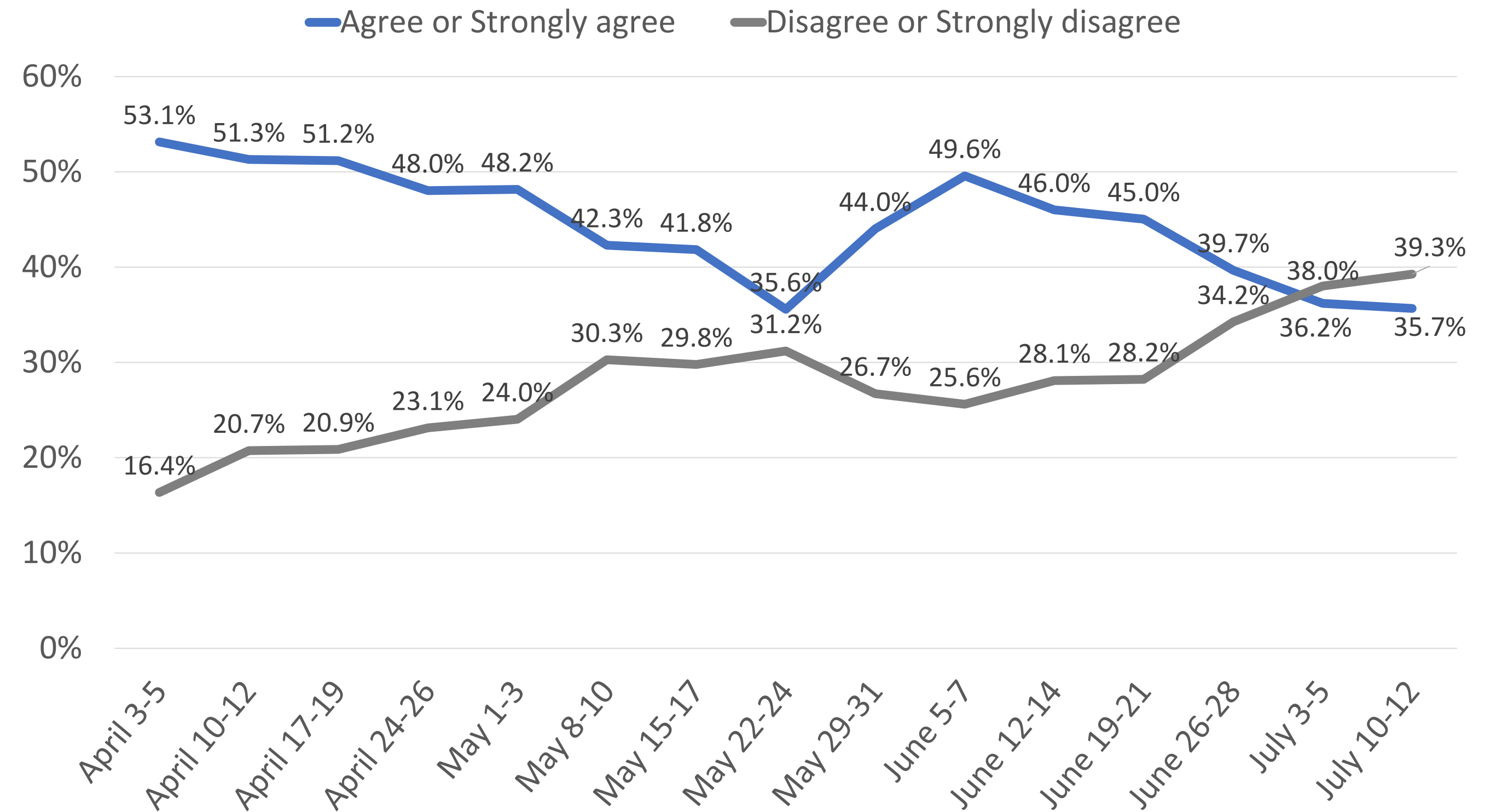
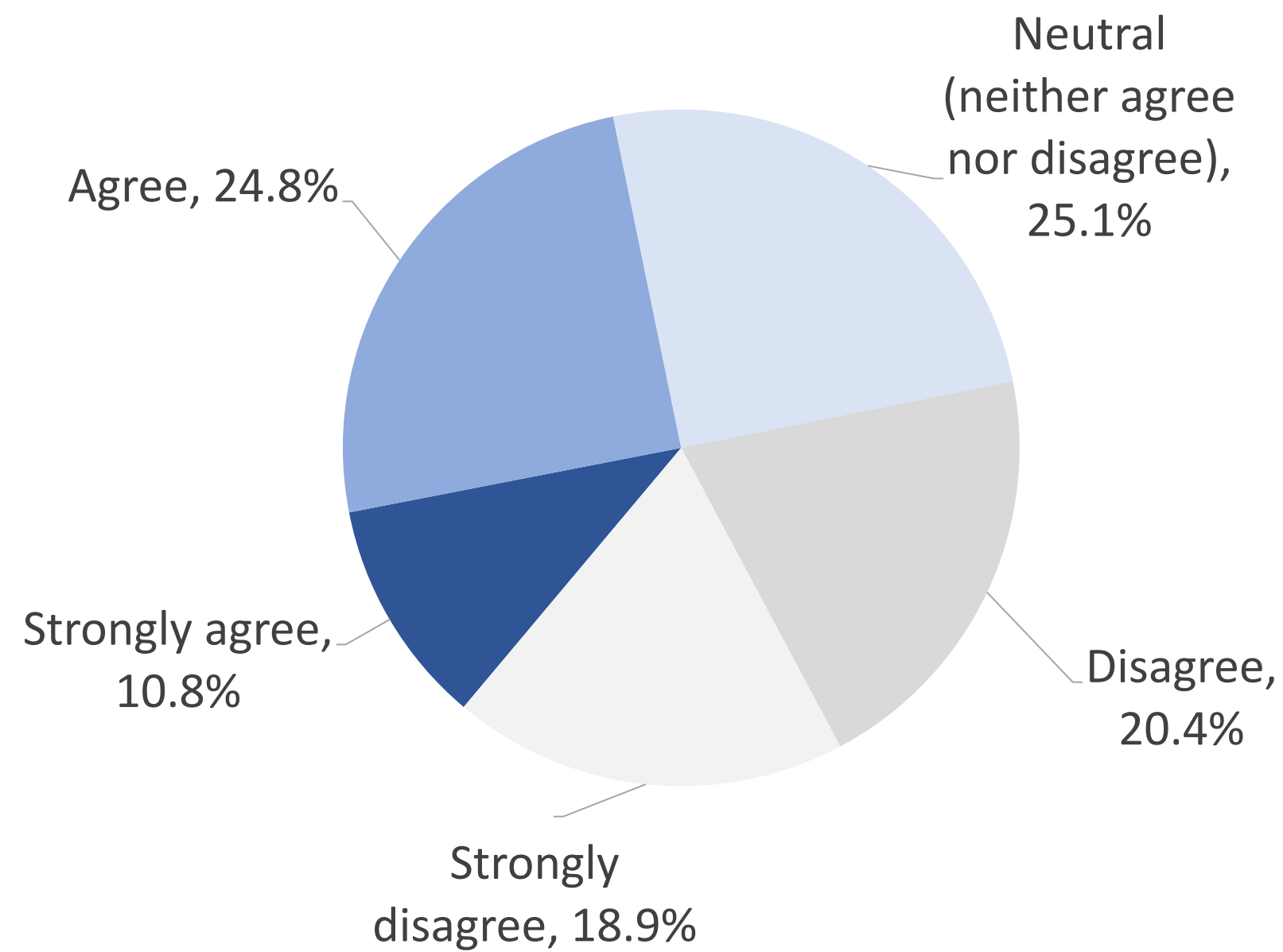


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

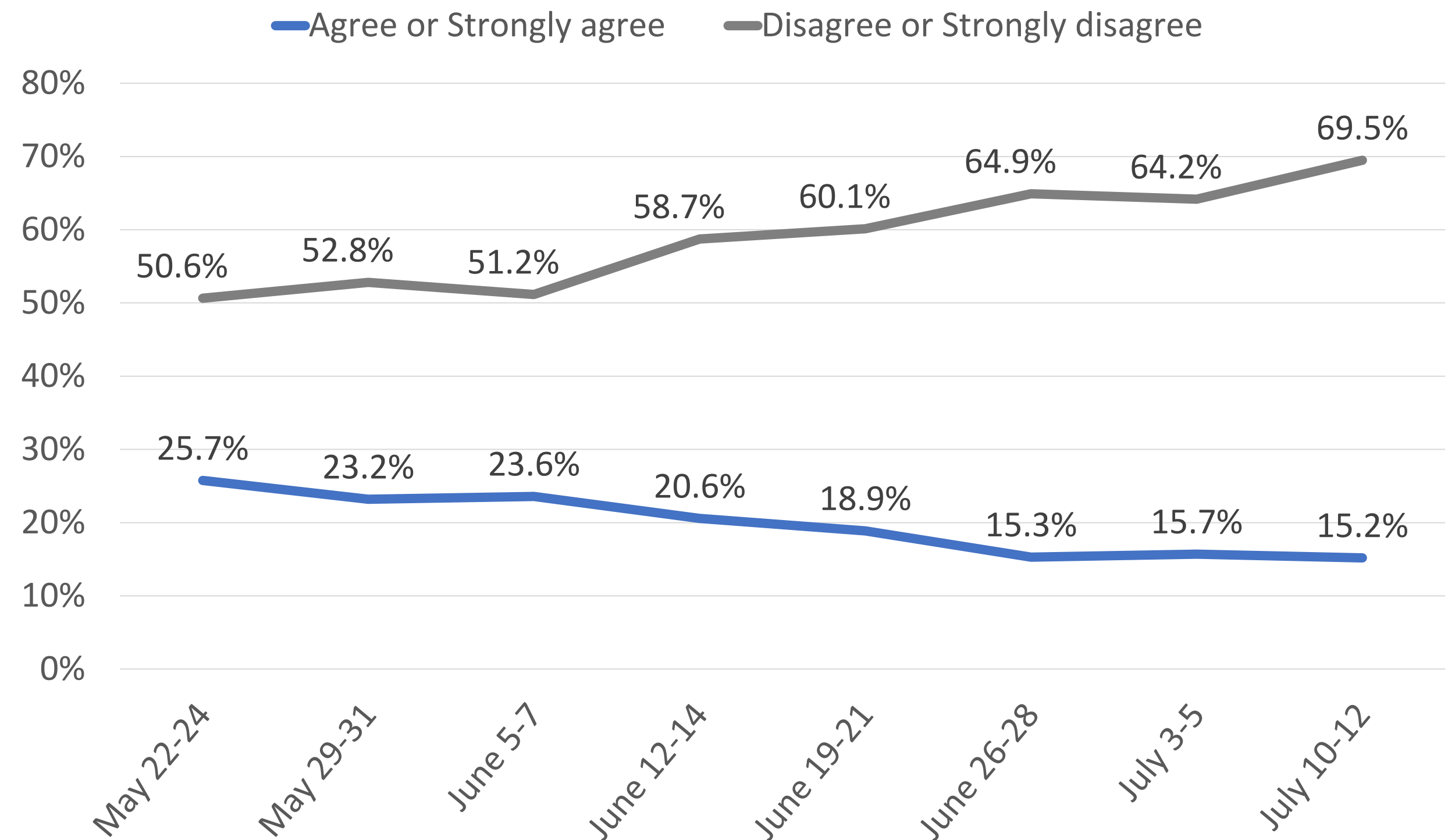
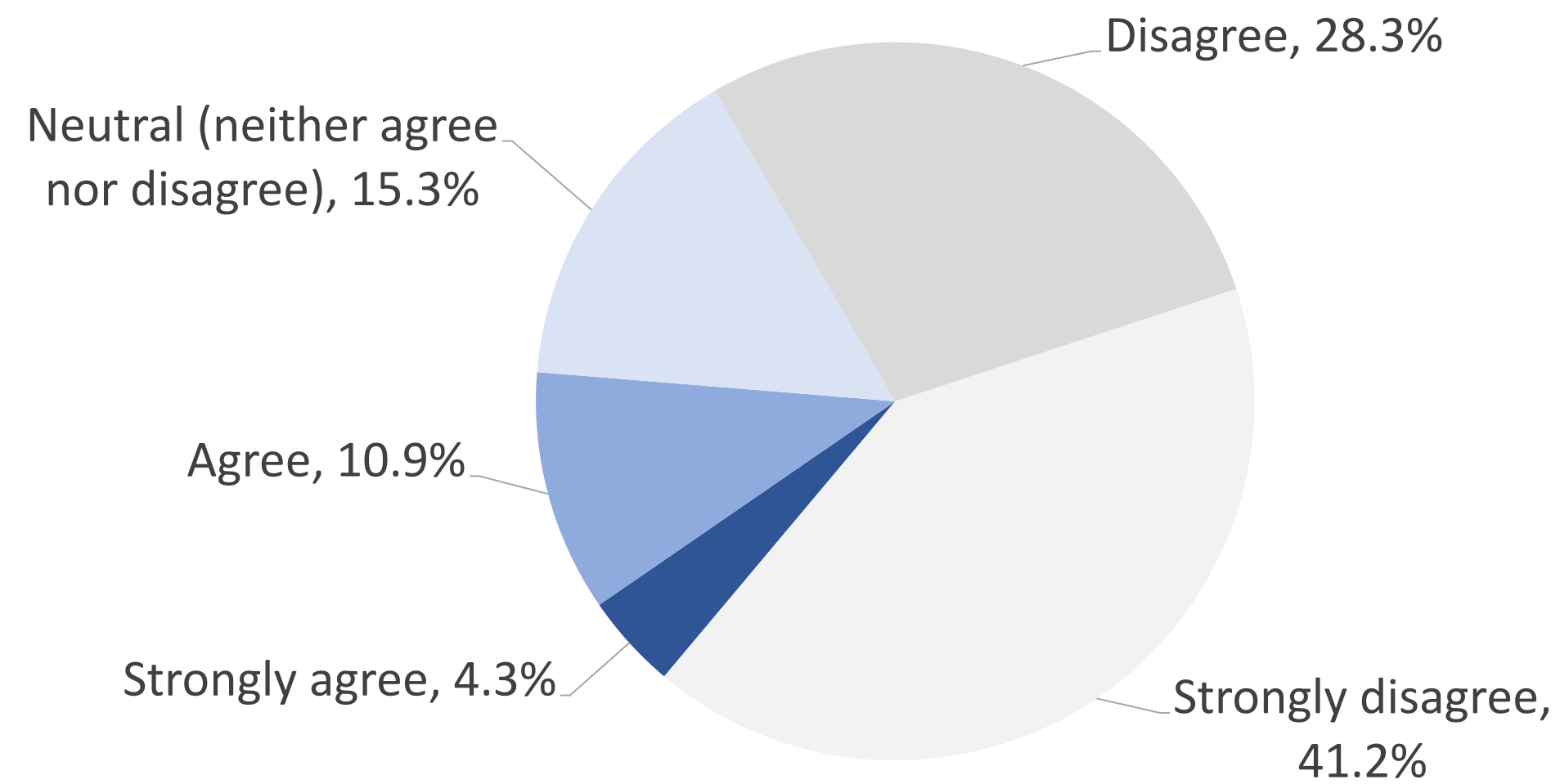


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

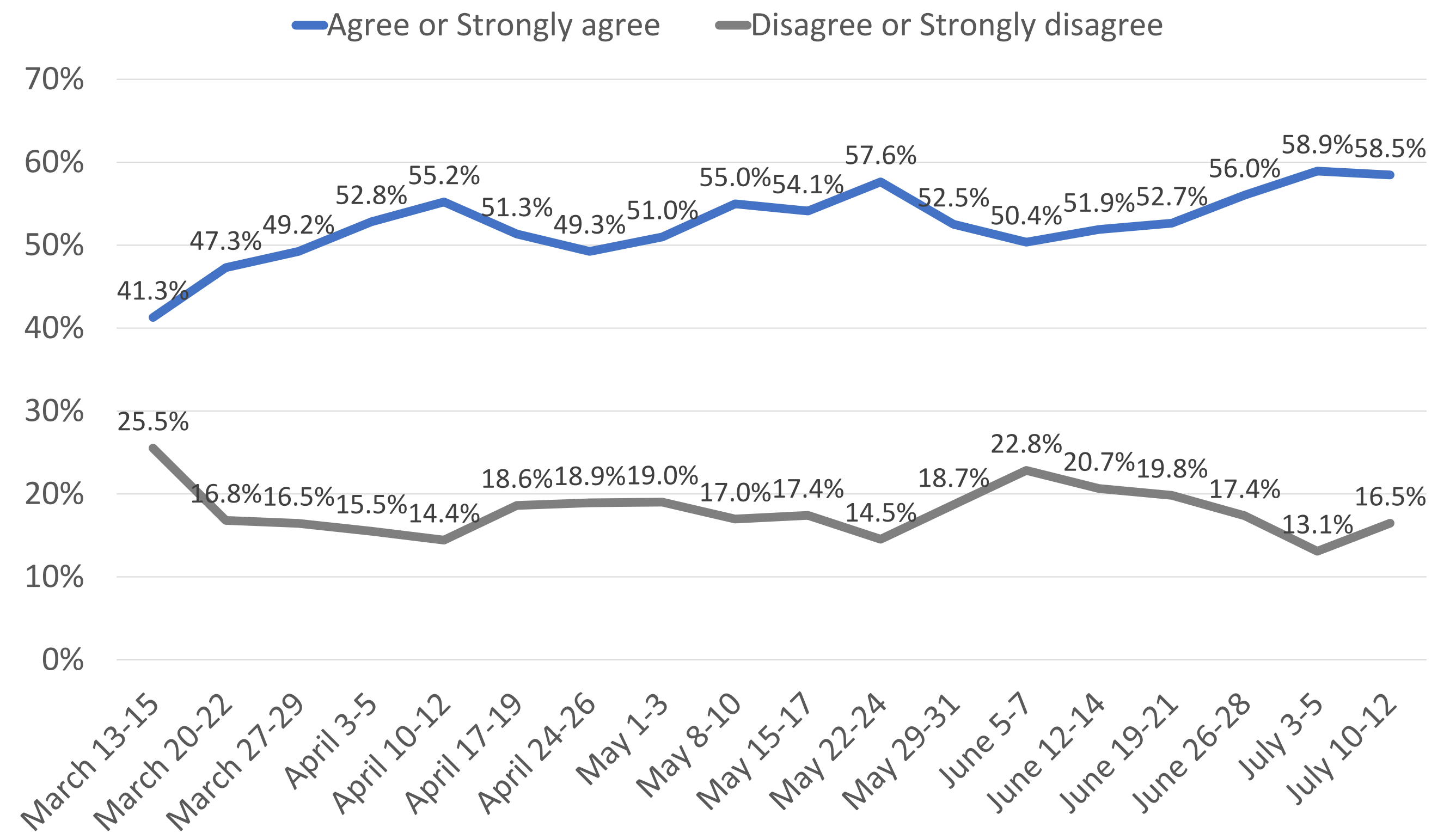
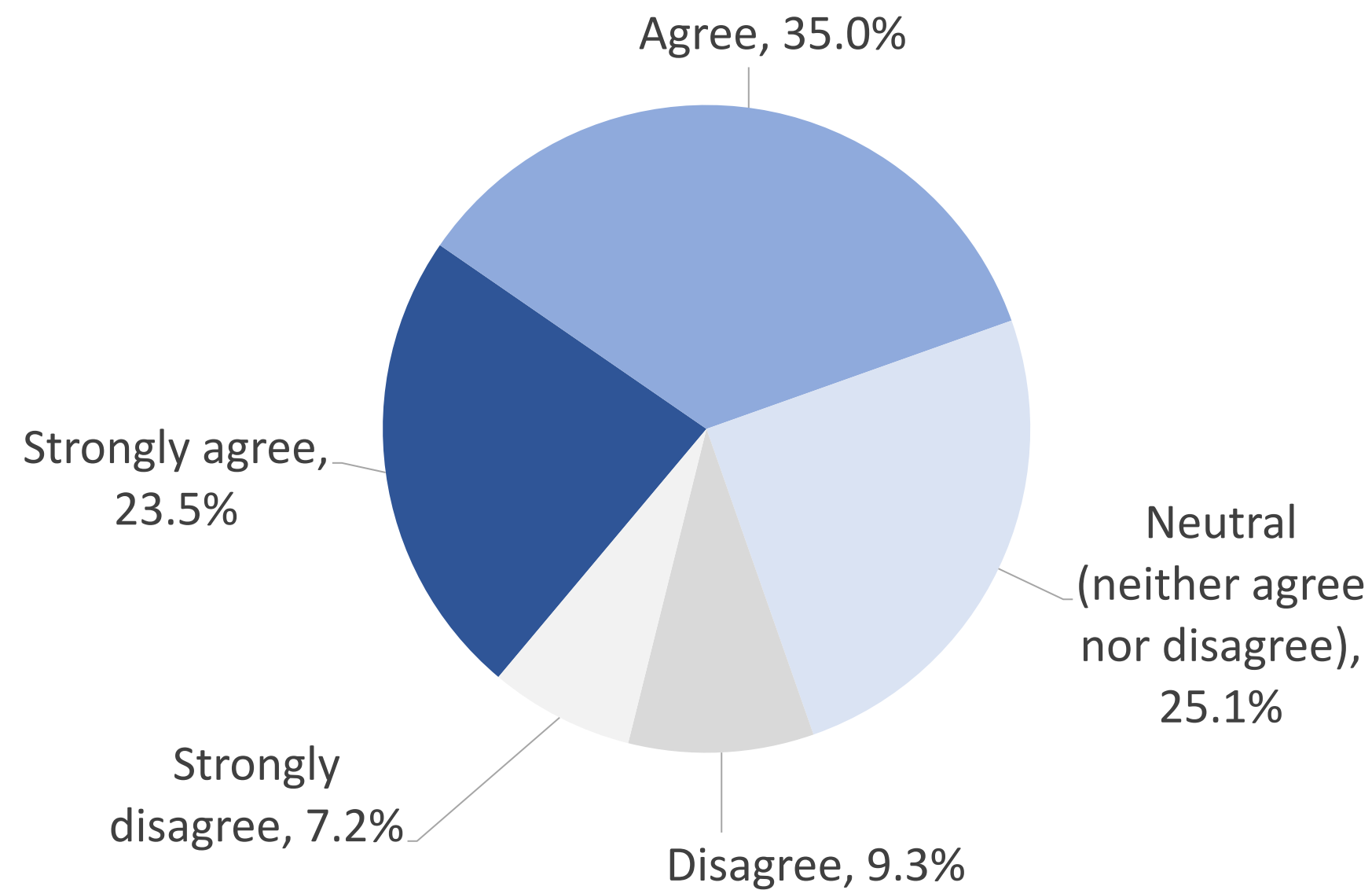


(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

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).

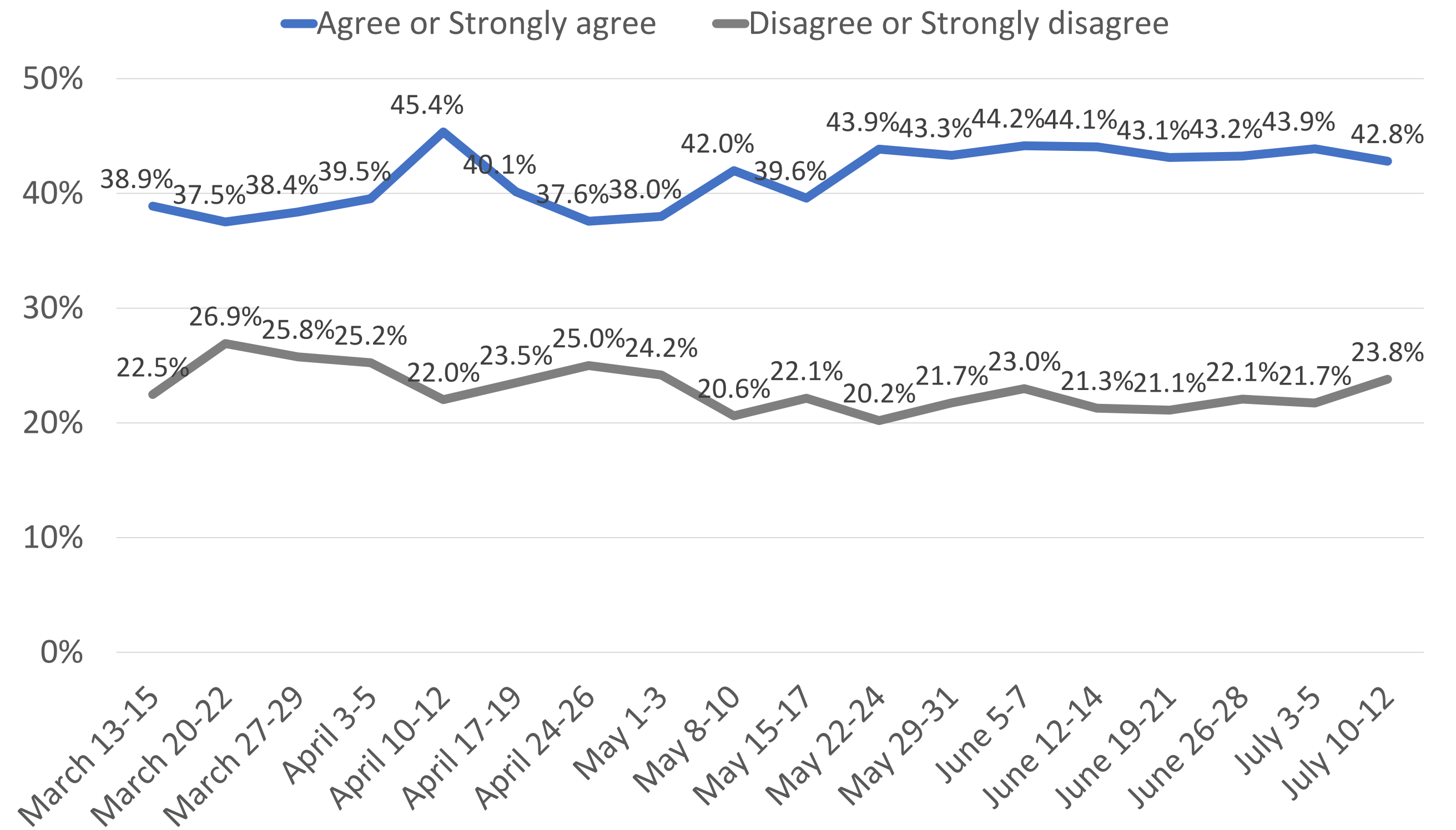
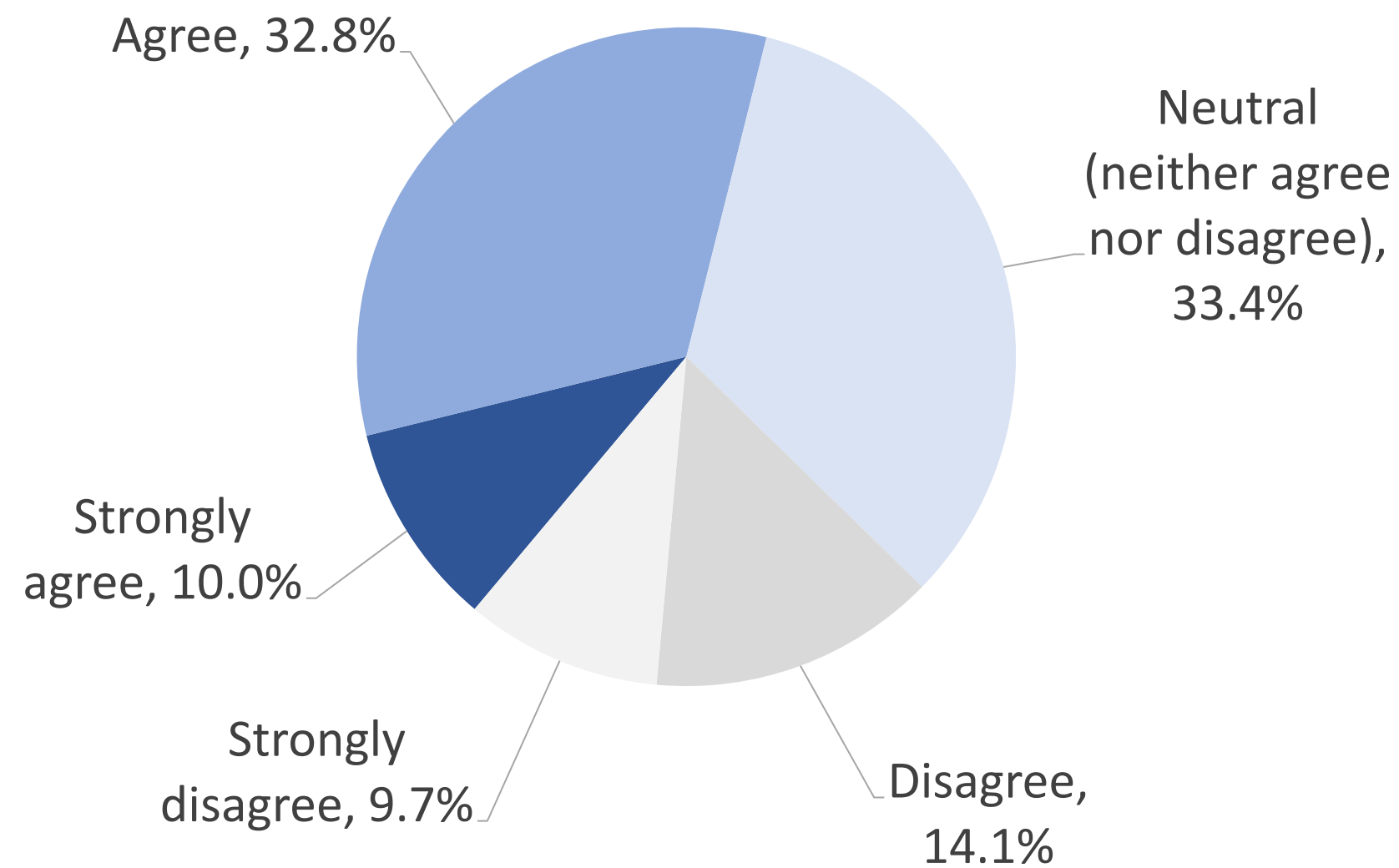


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

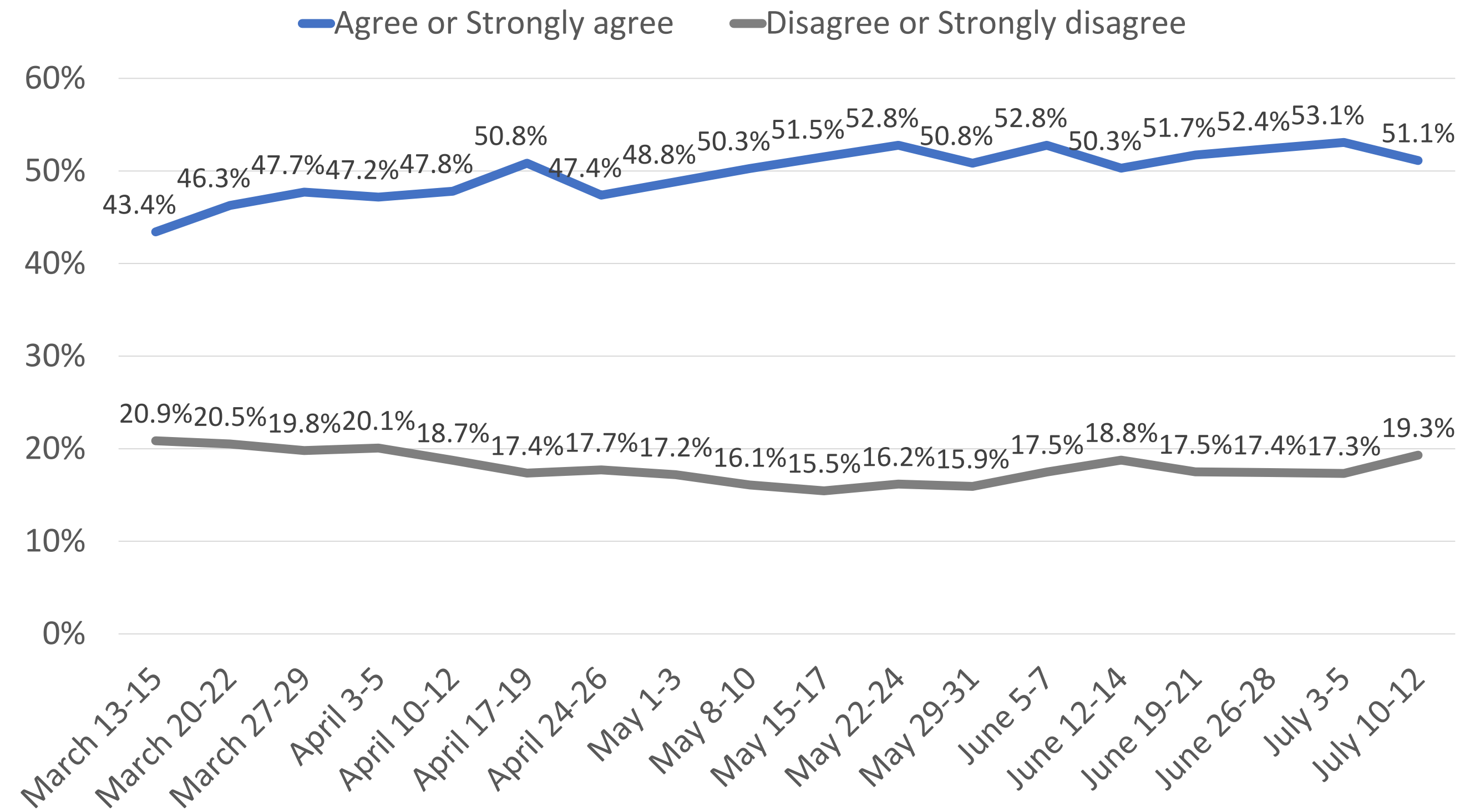
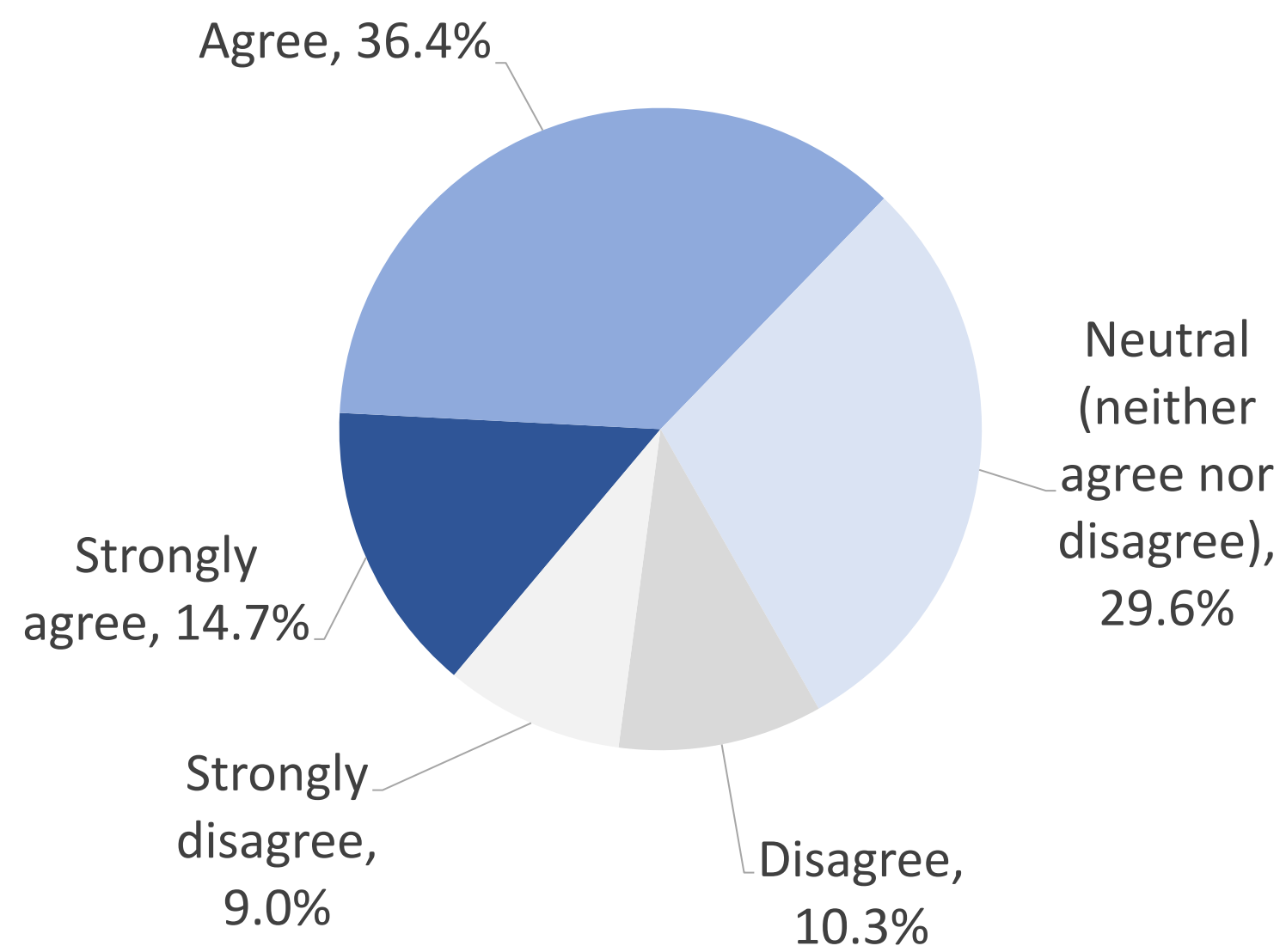


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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).

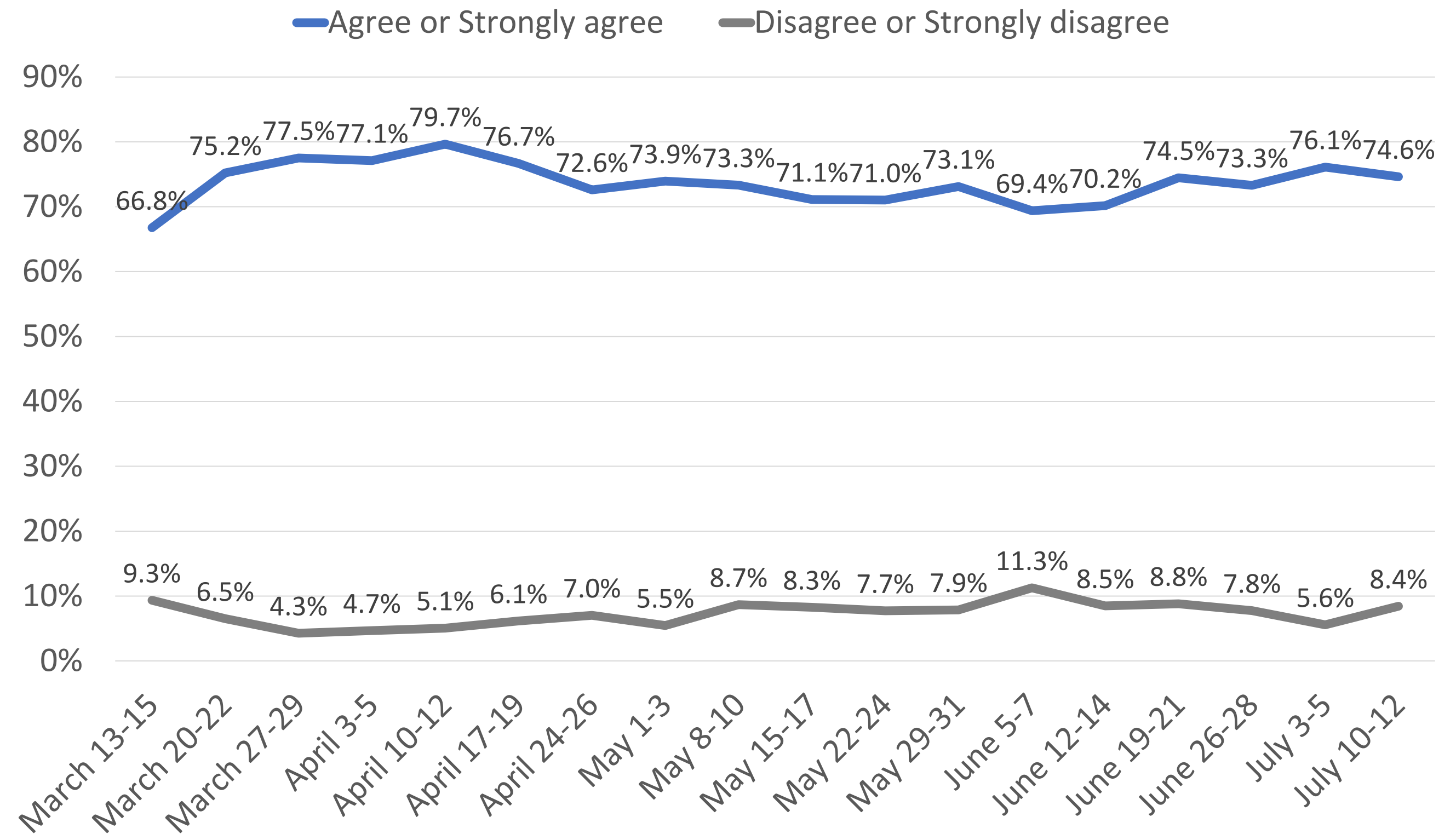
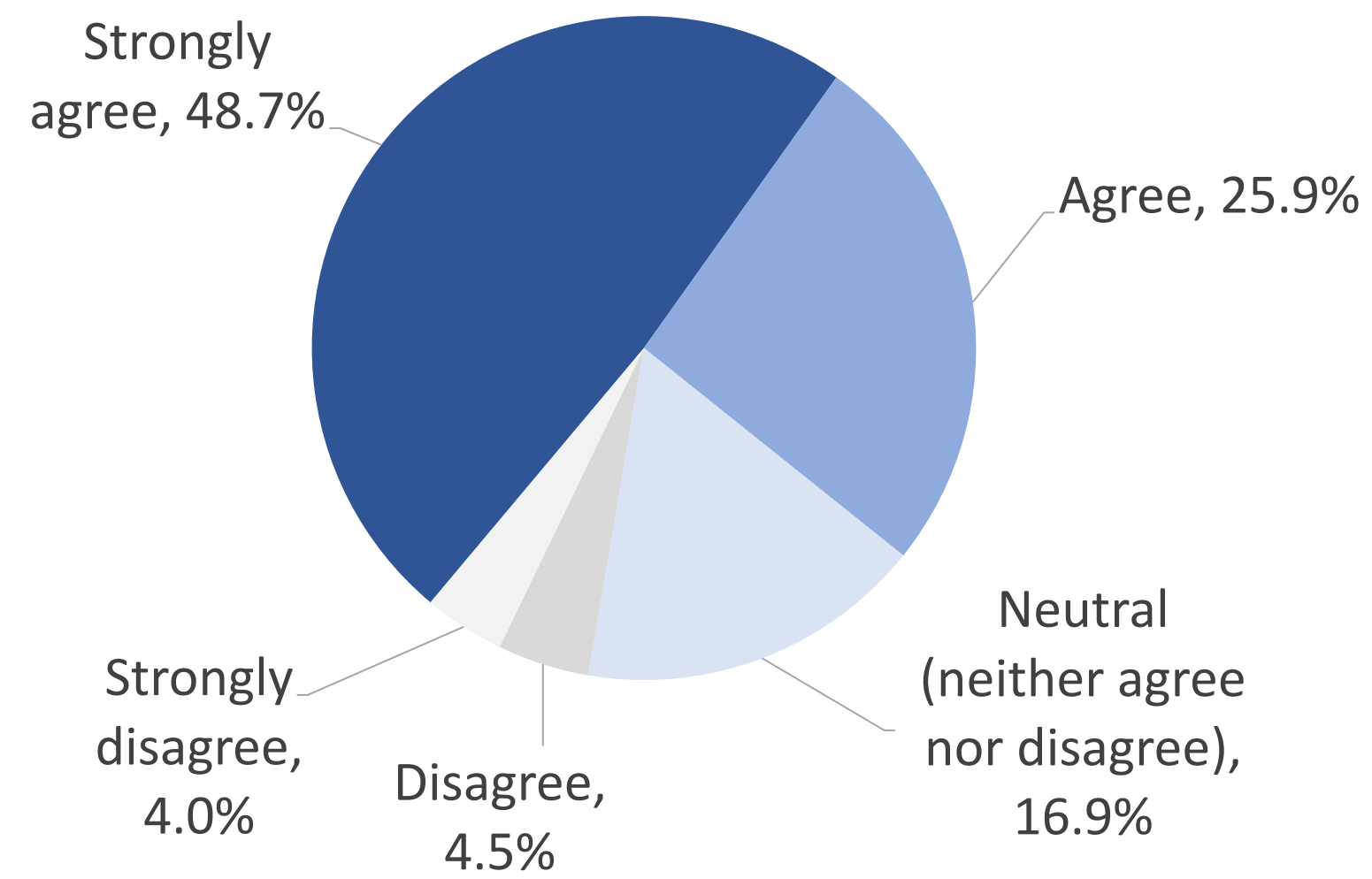


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

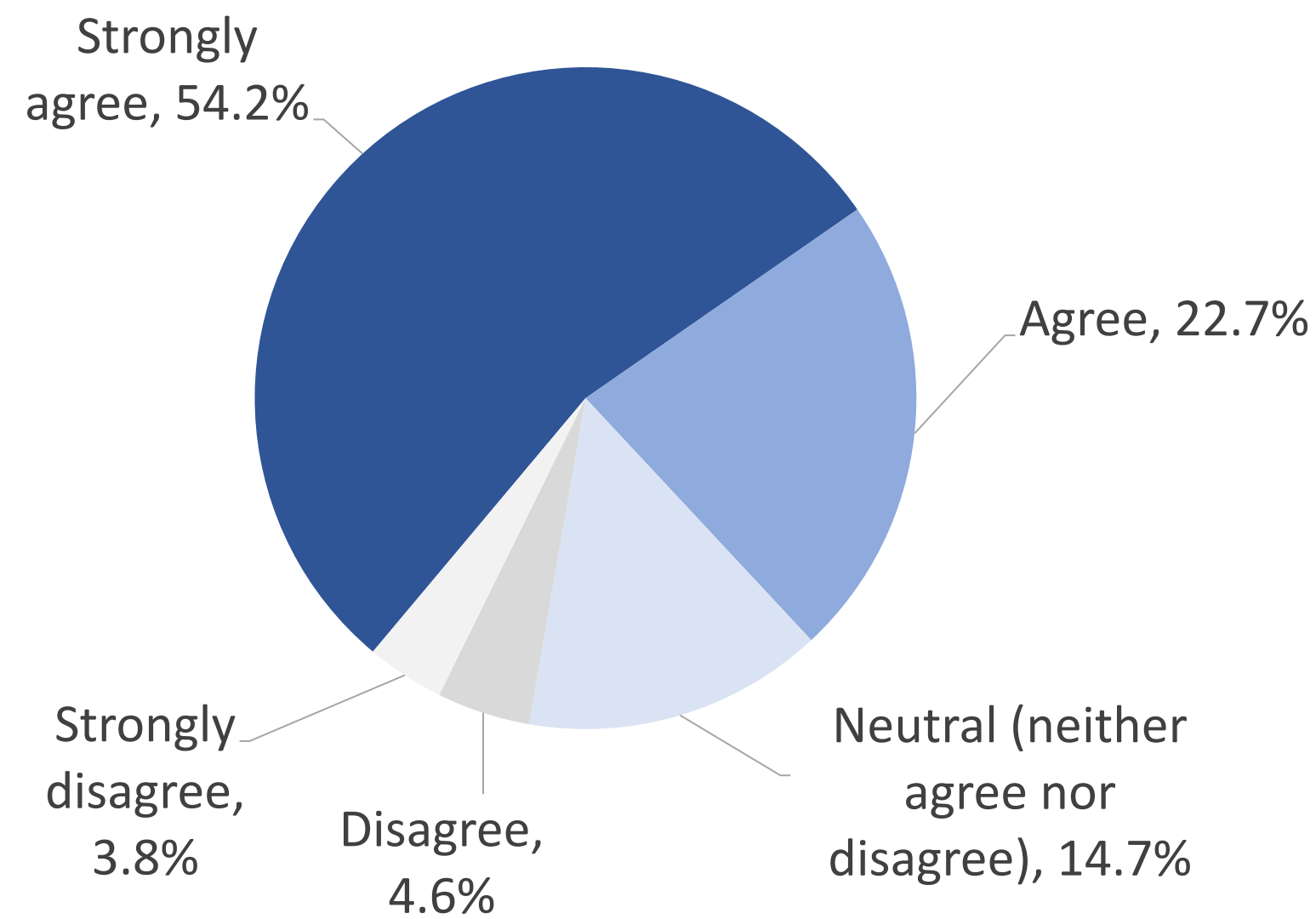


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

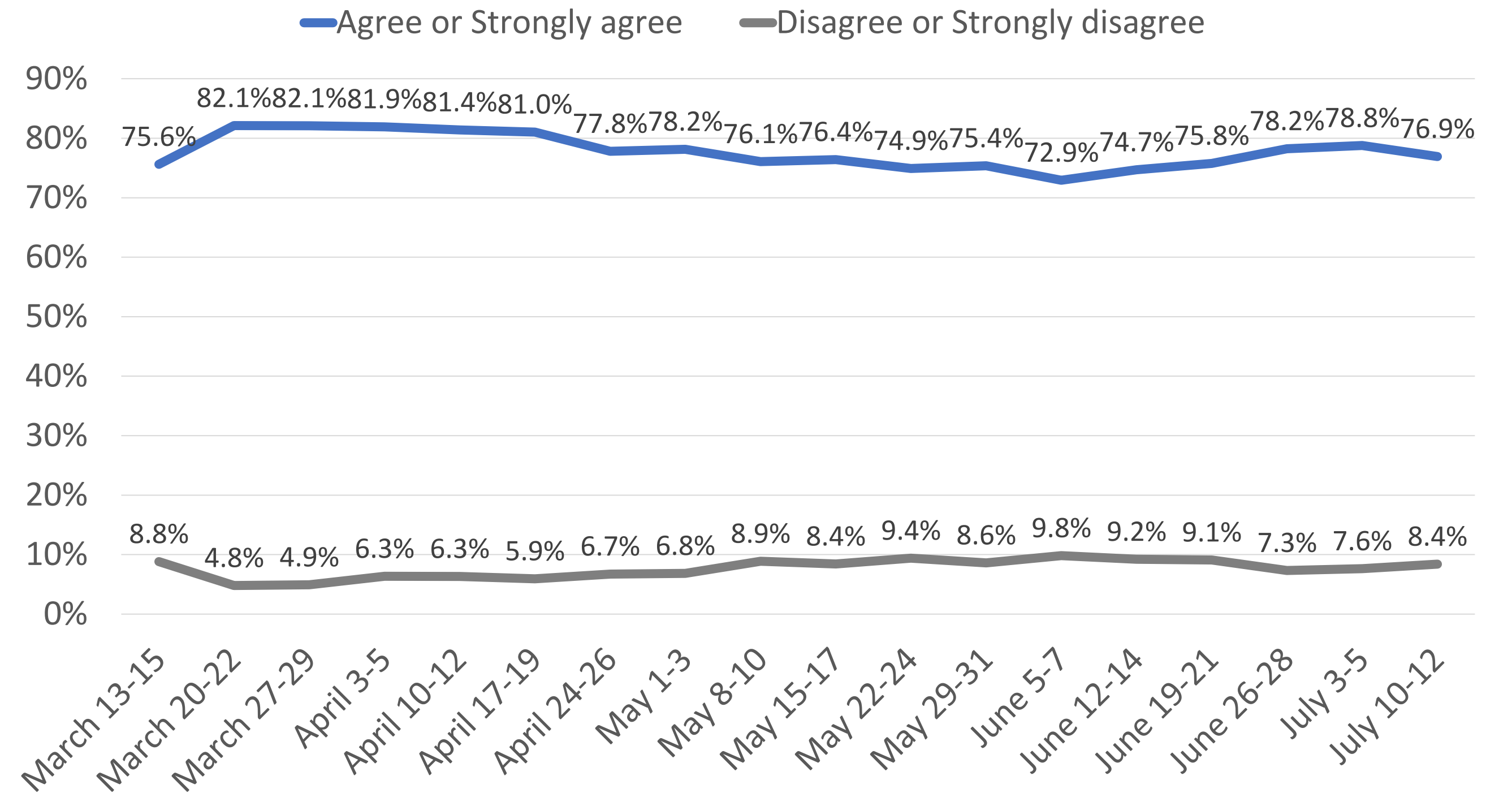
Avoiding International Travel

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.



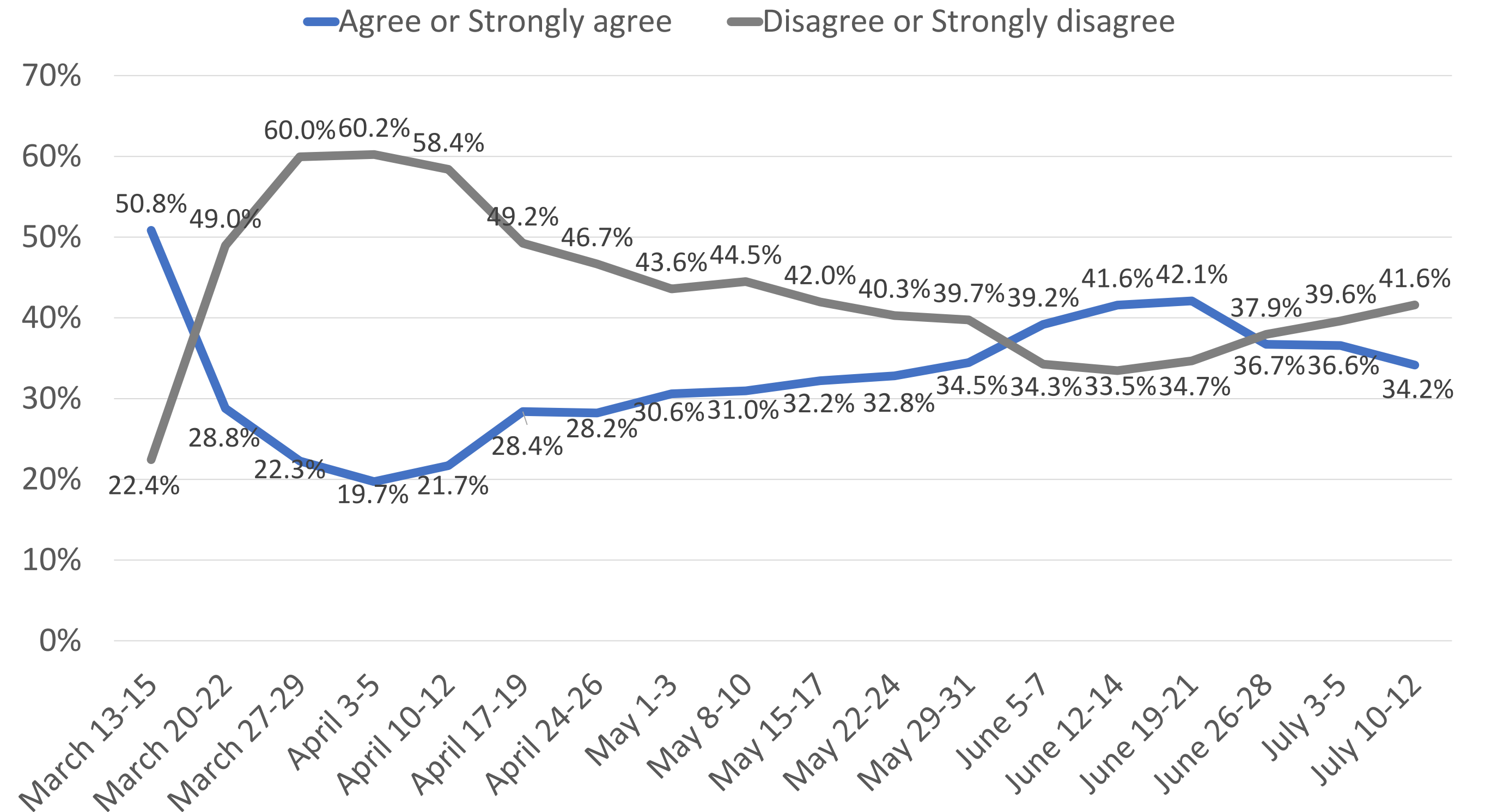
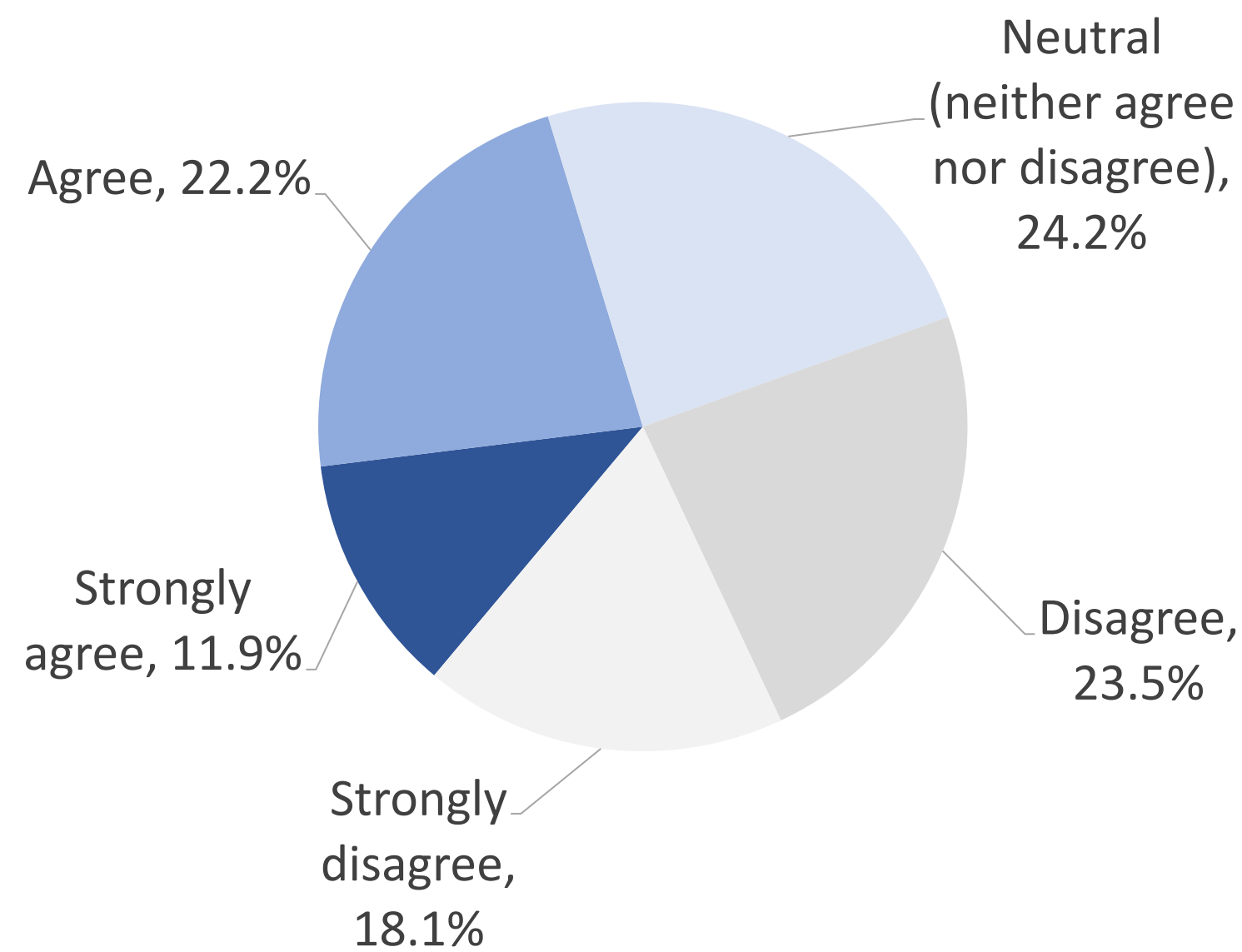
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

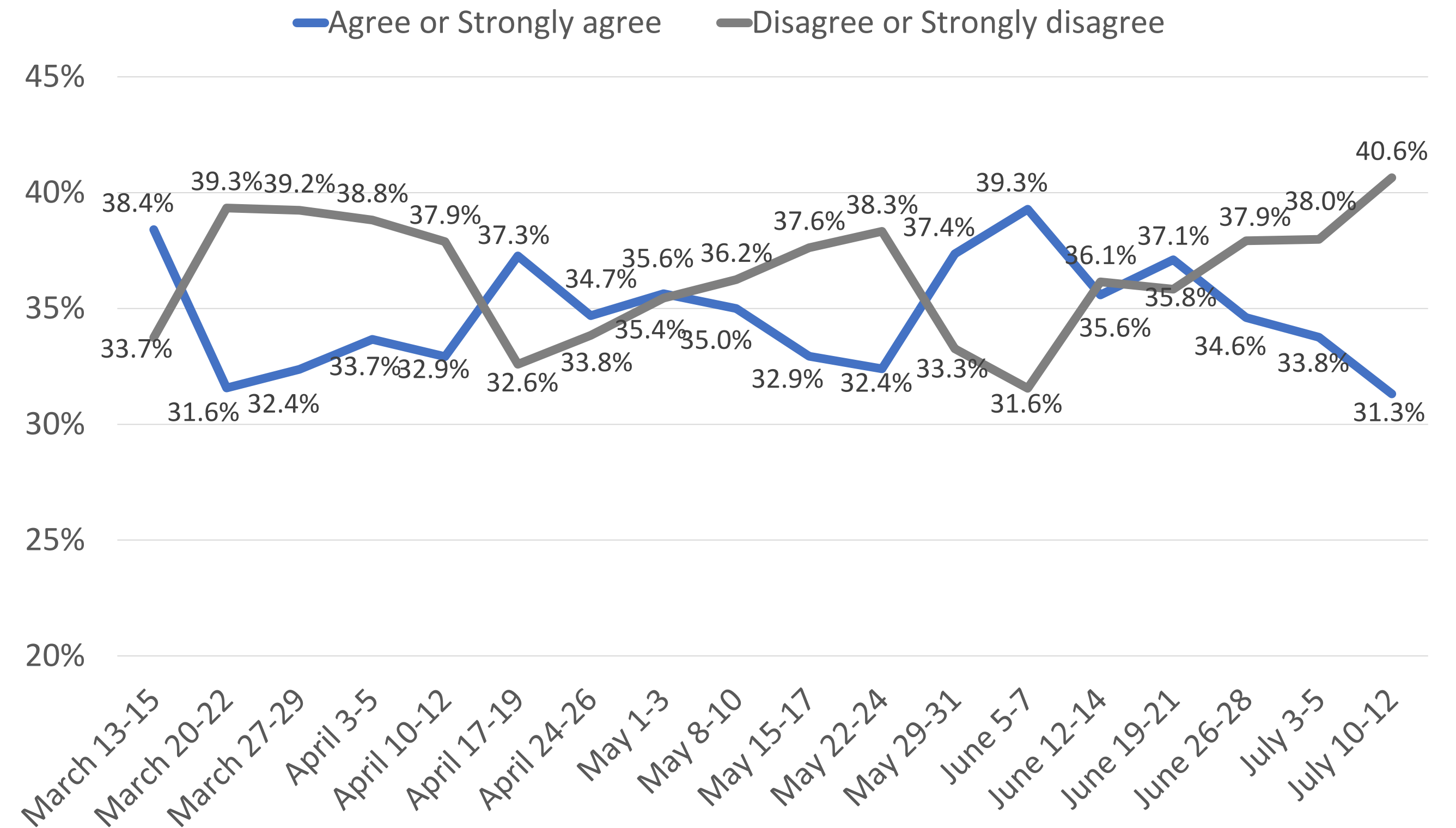
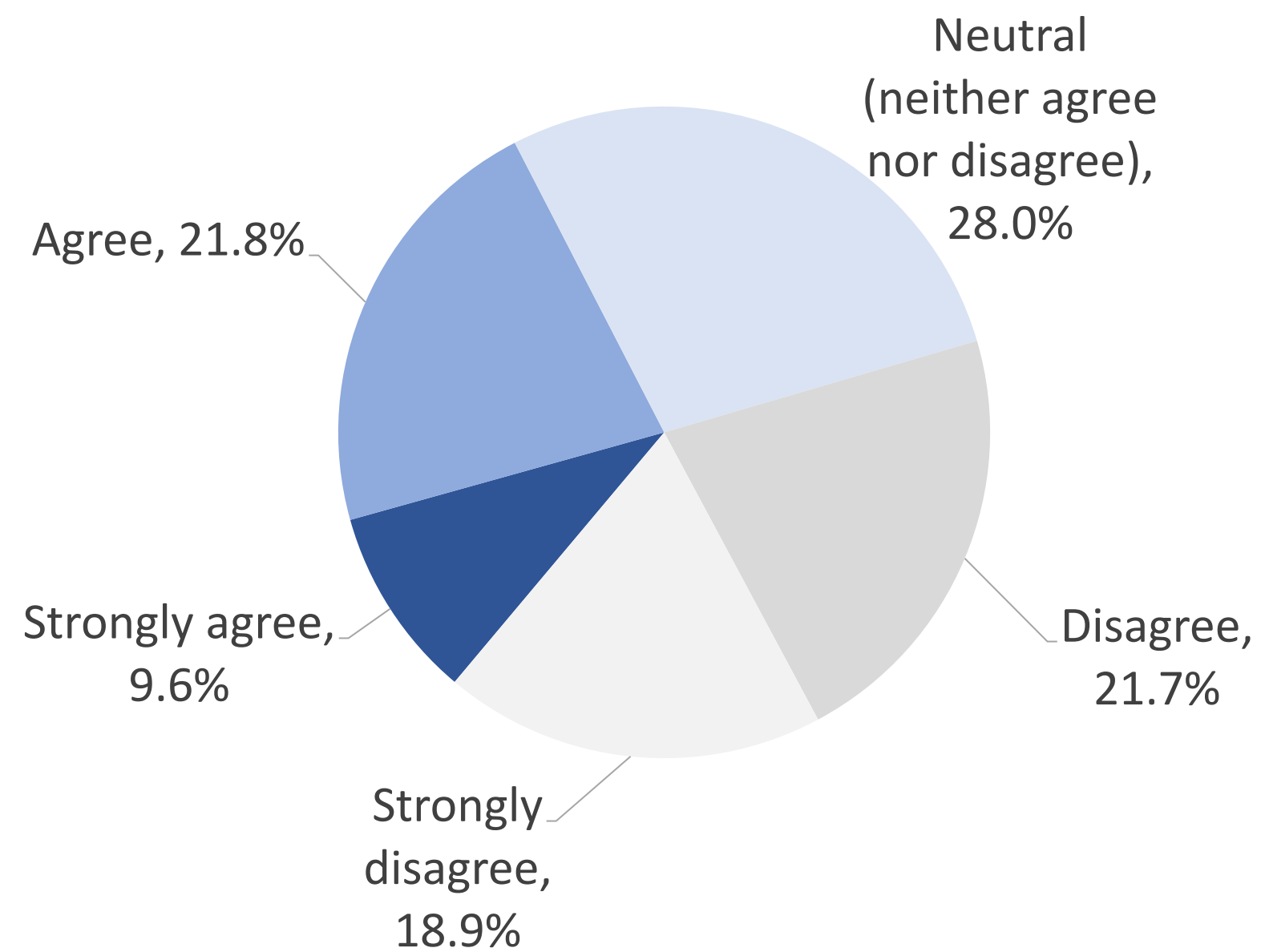


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

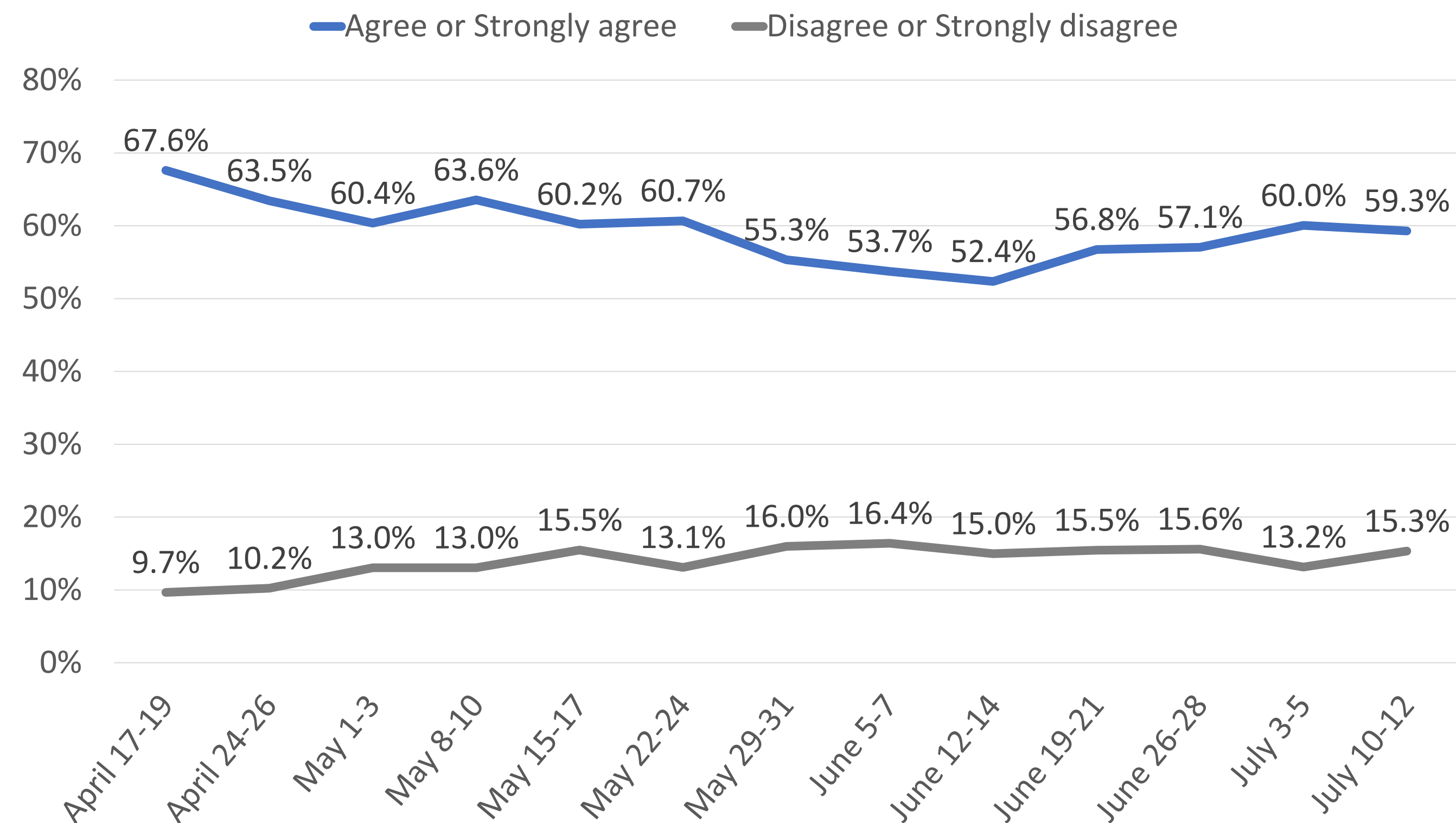
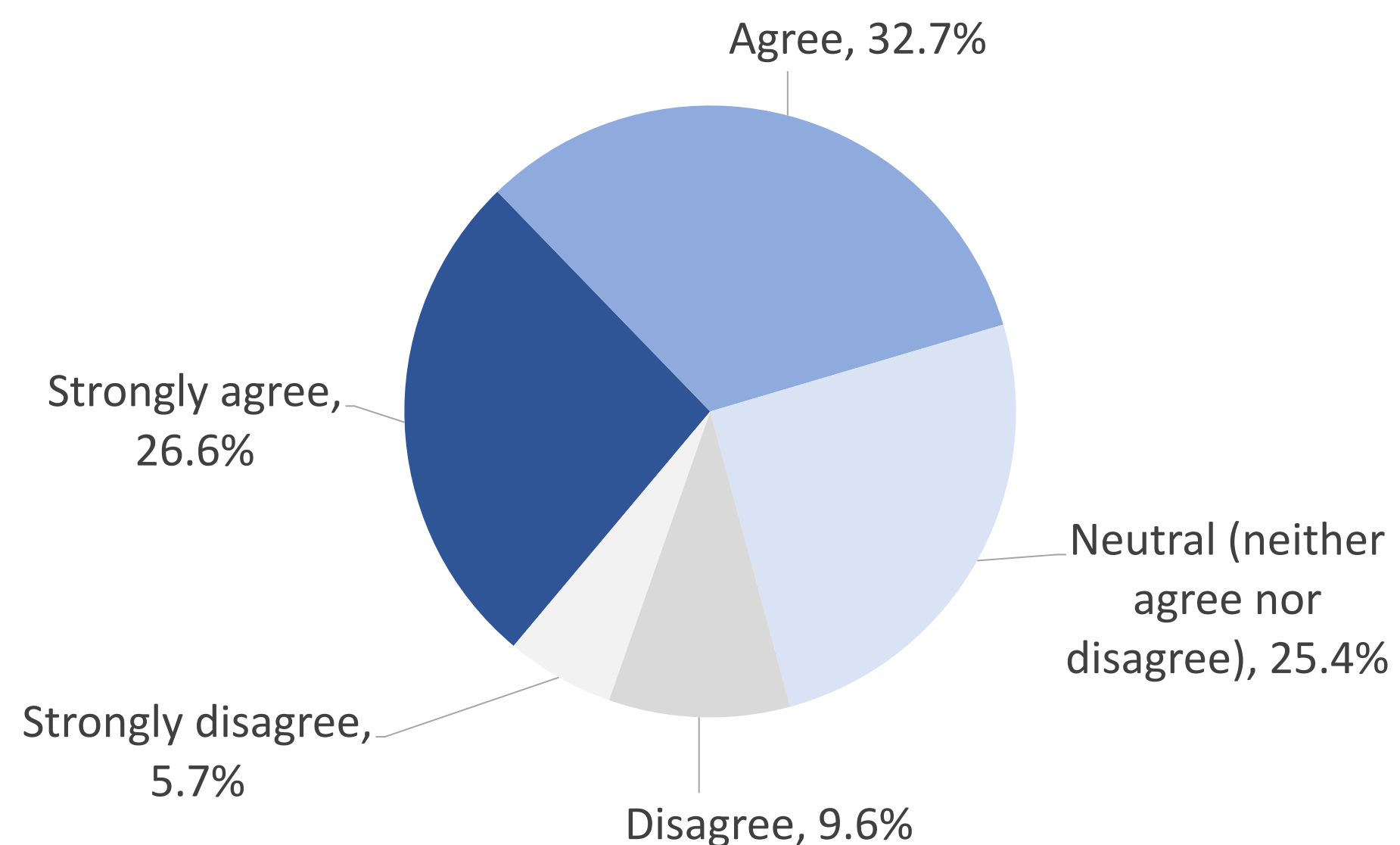


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 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.

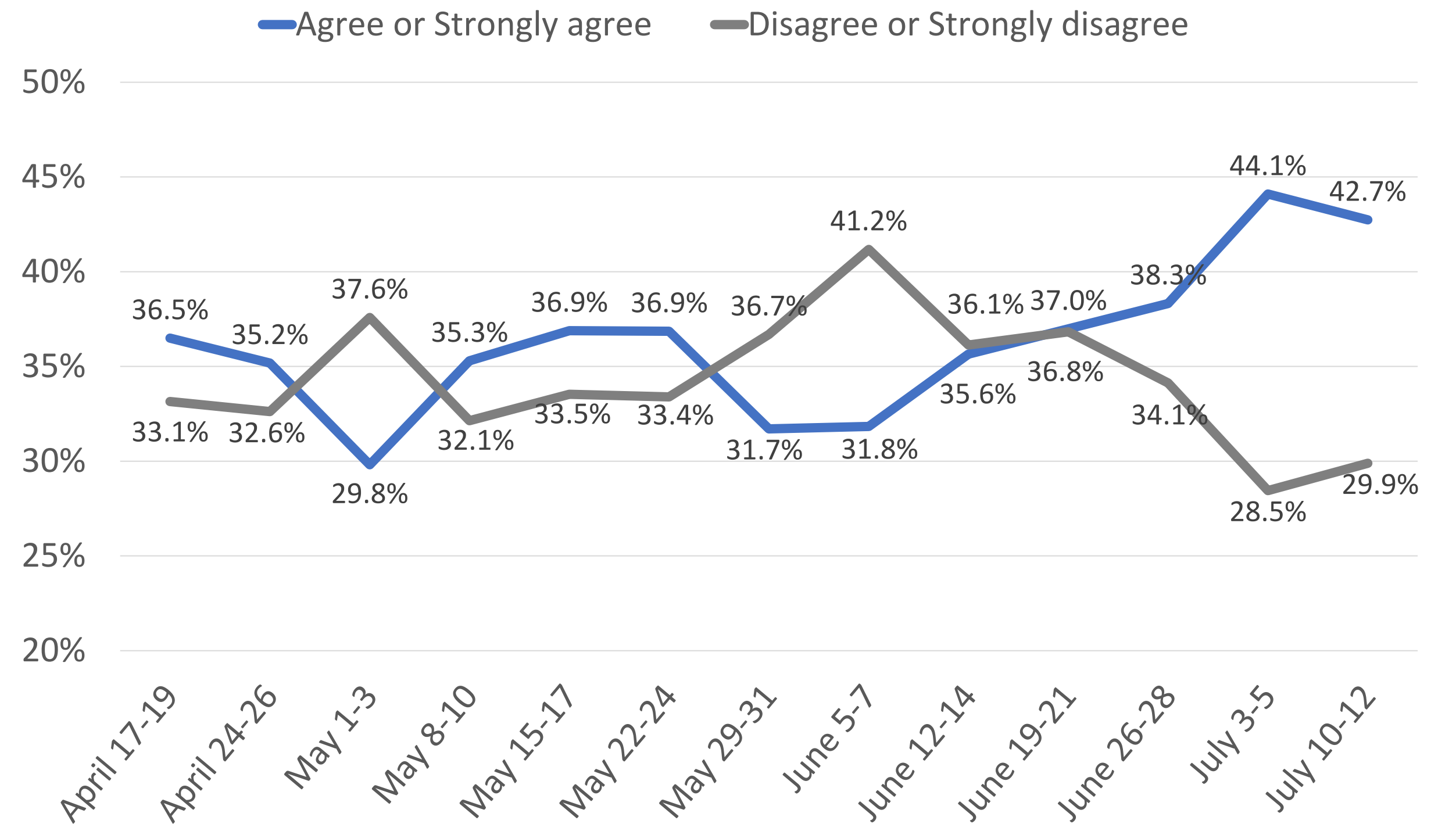
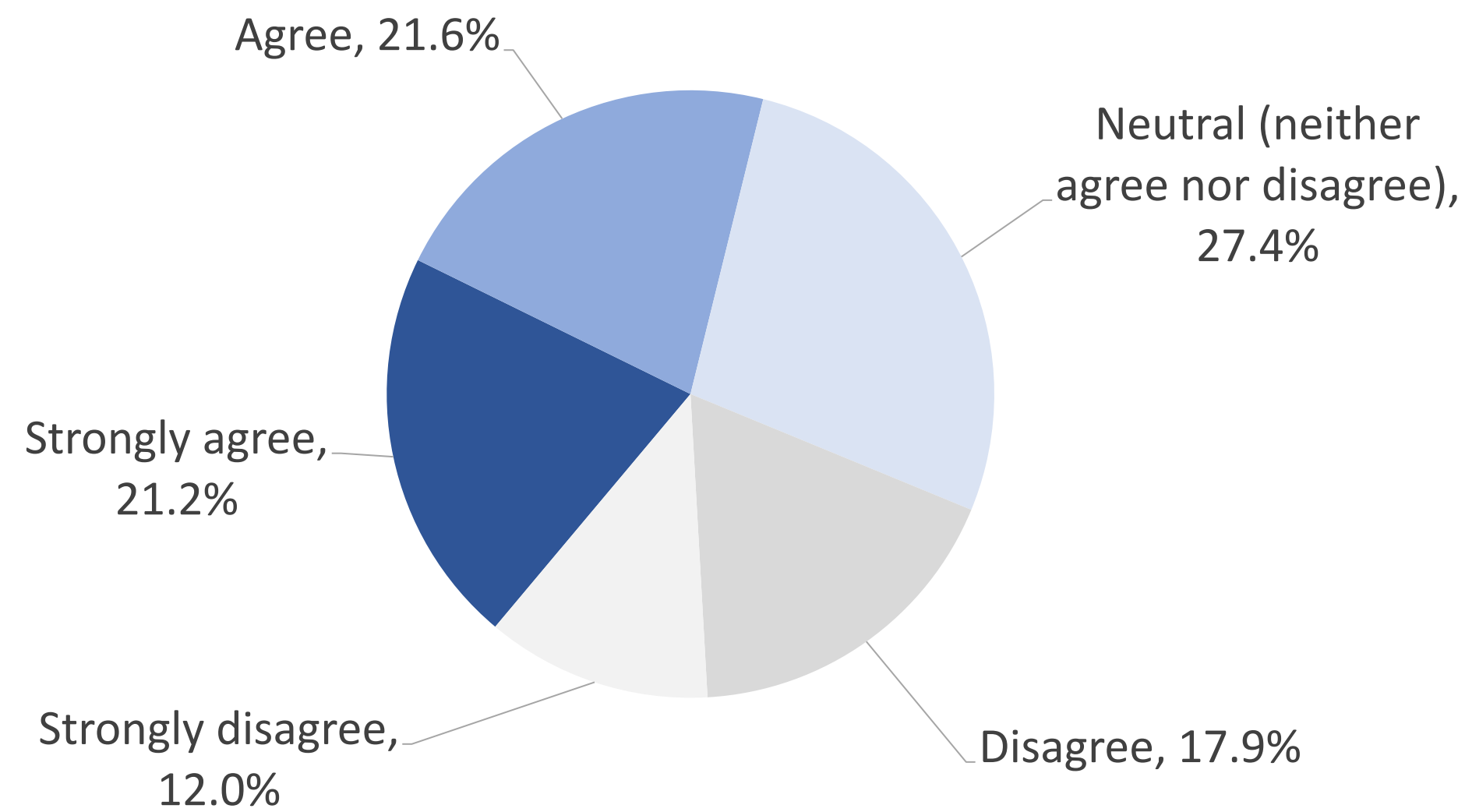


(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365 and 1,213 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5 and 10-12, 2020)

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, 1,365 and 1,213 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, July 3-5 and 10-12, 2020)



Coronavirus Travel Sentiment Index

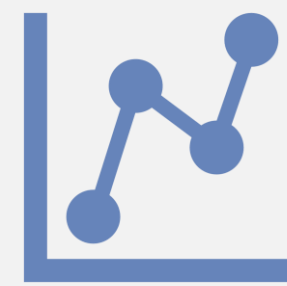
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of July 13th

What is a Predictive Index?



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



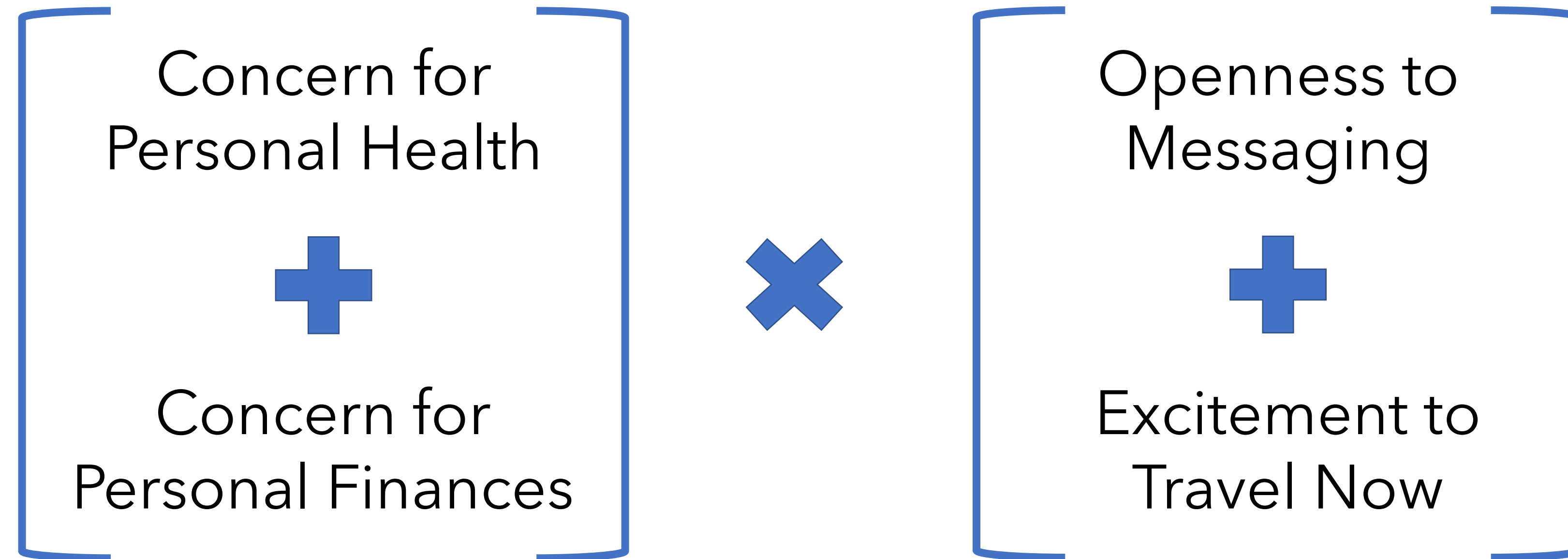
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

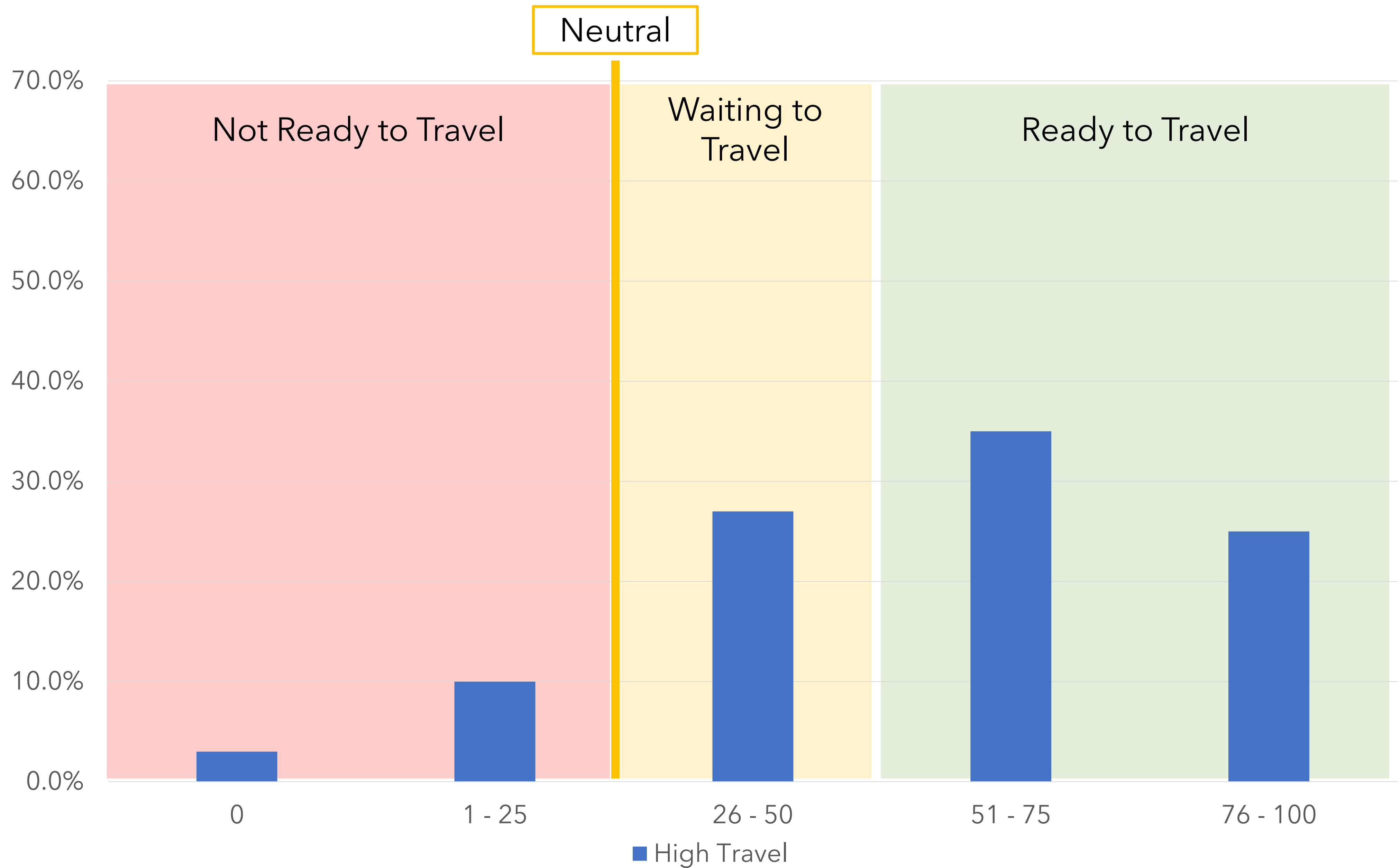
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

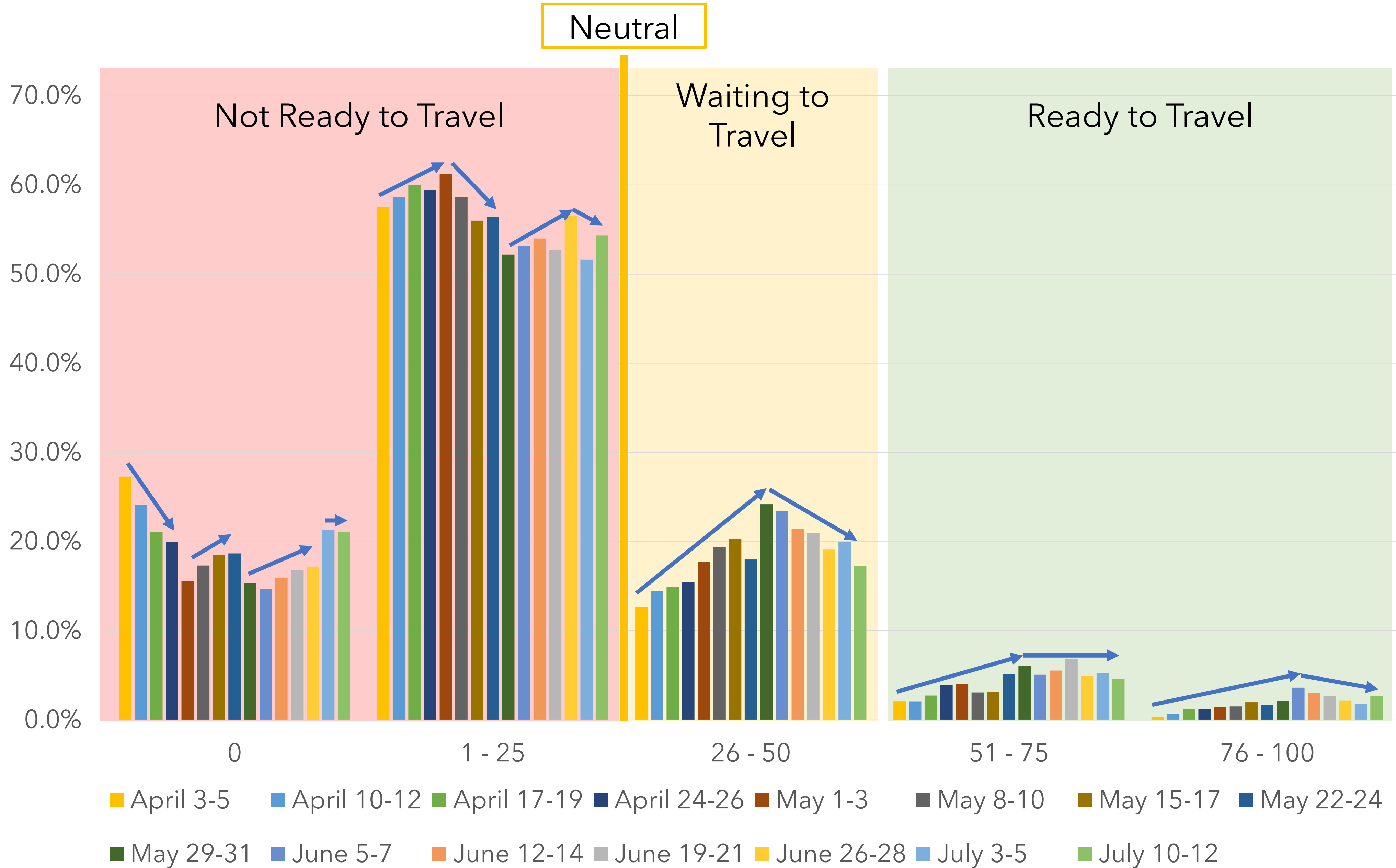


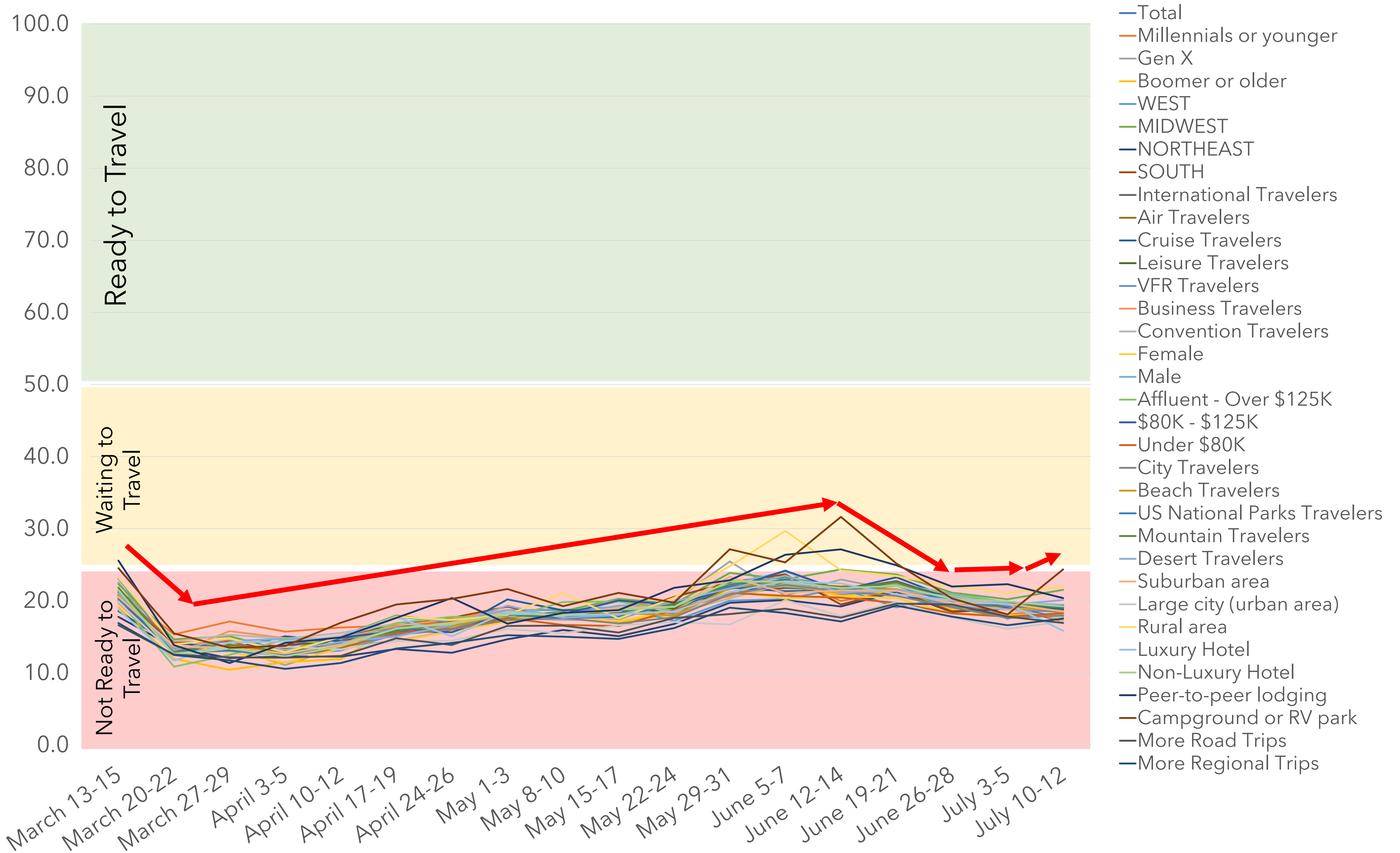
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook

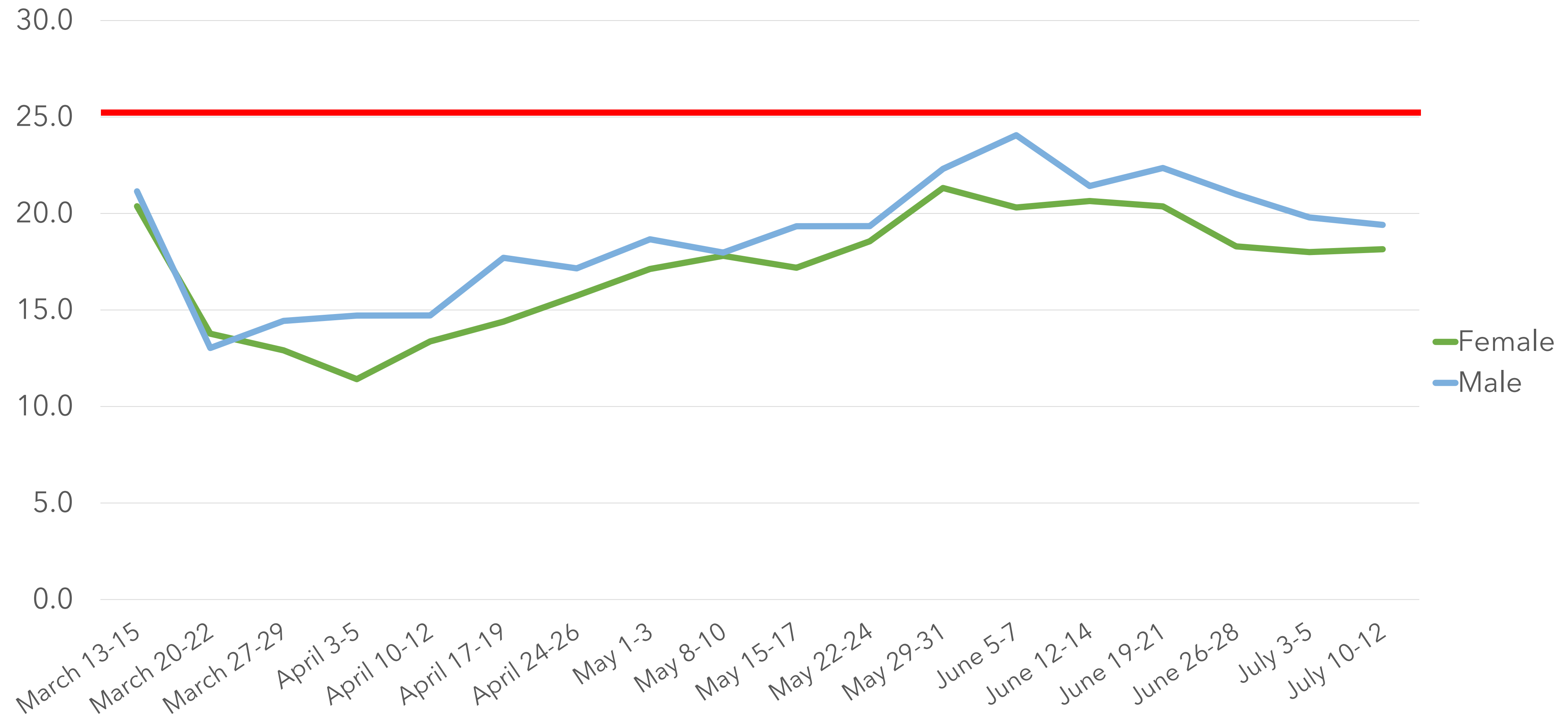




Gender

Points of Interest:

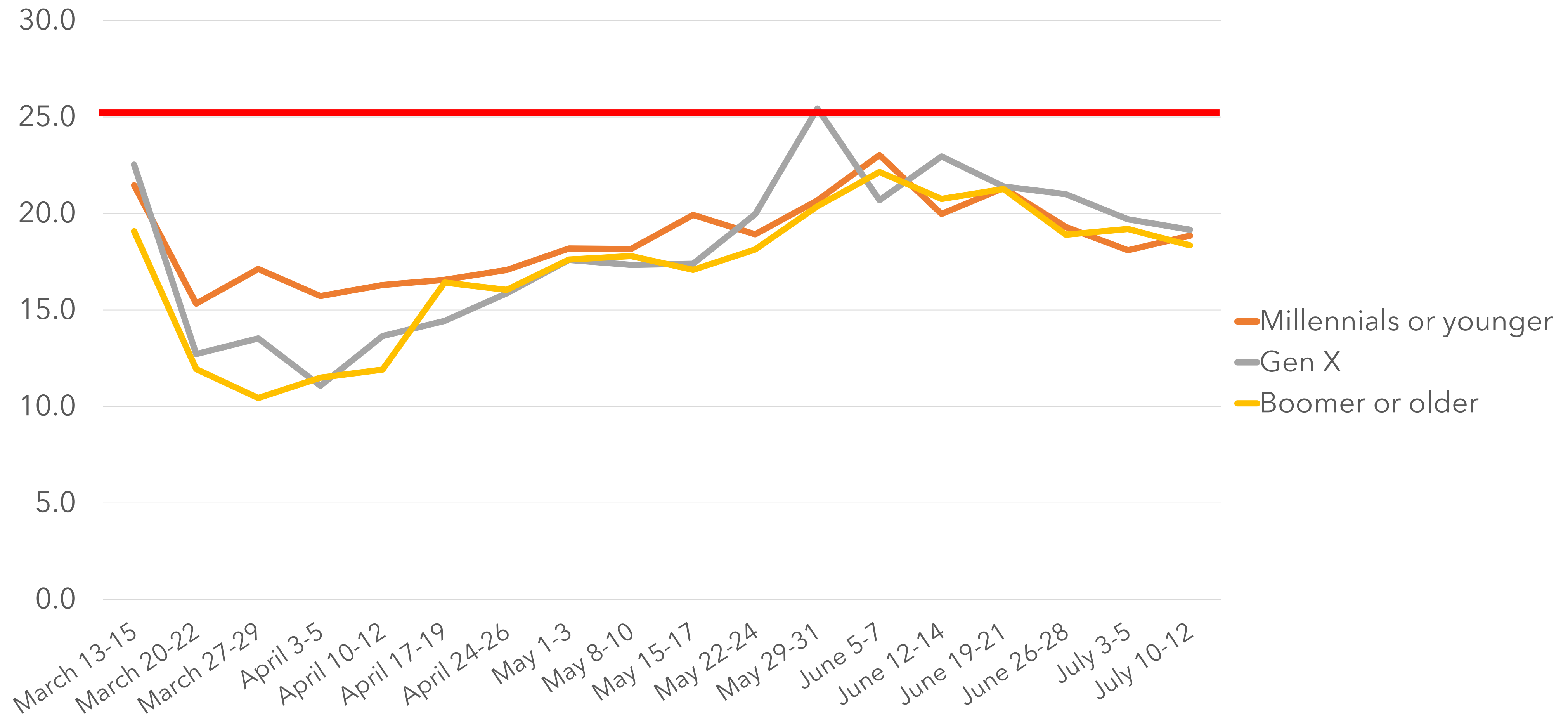
- Safety concerns stayed consistent for both Men and Women this week.
- This week 45.3 percent of Women reported they have no plans to travel in 2020 (up from 41.2% last week).
- About a quarter of Men again this week (23.7%) said they are already traveling or ready to travel with no hesitations (compared to 20.6% of Women).



Generation

Points of Interest:

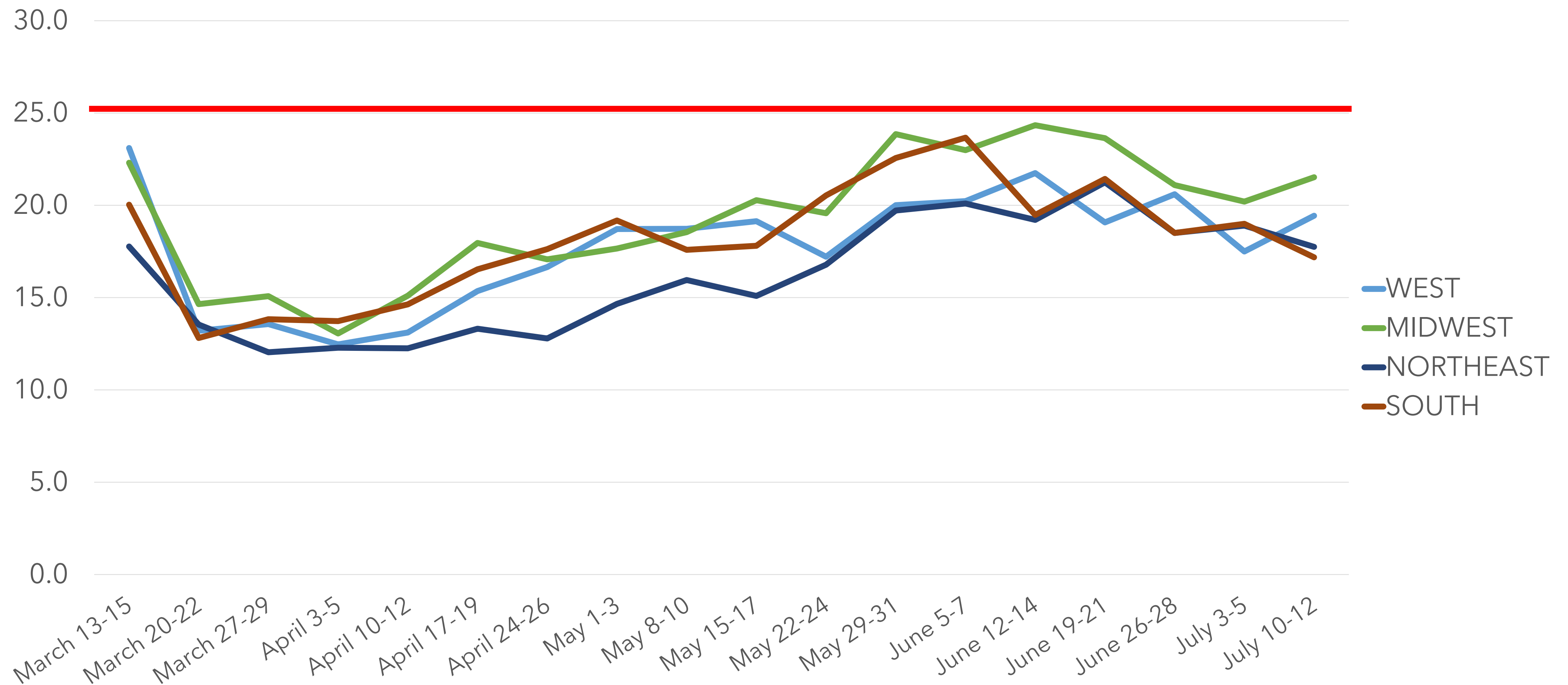
- Gen X continued to index higher than the other generations this week by a small margin.
- Boomers showed a slight increase in safety concerns this week compared to the other generations.
- About a third of Millennials reported they would be happy to see an ad promoting their community for travel.



US Region

Points of Interest:

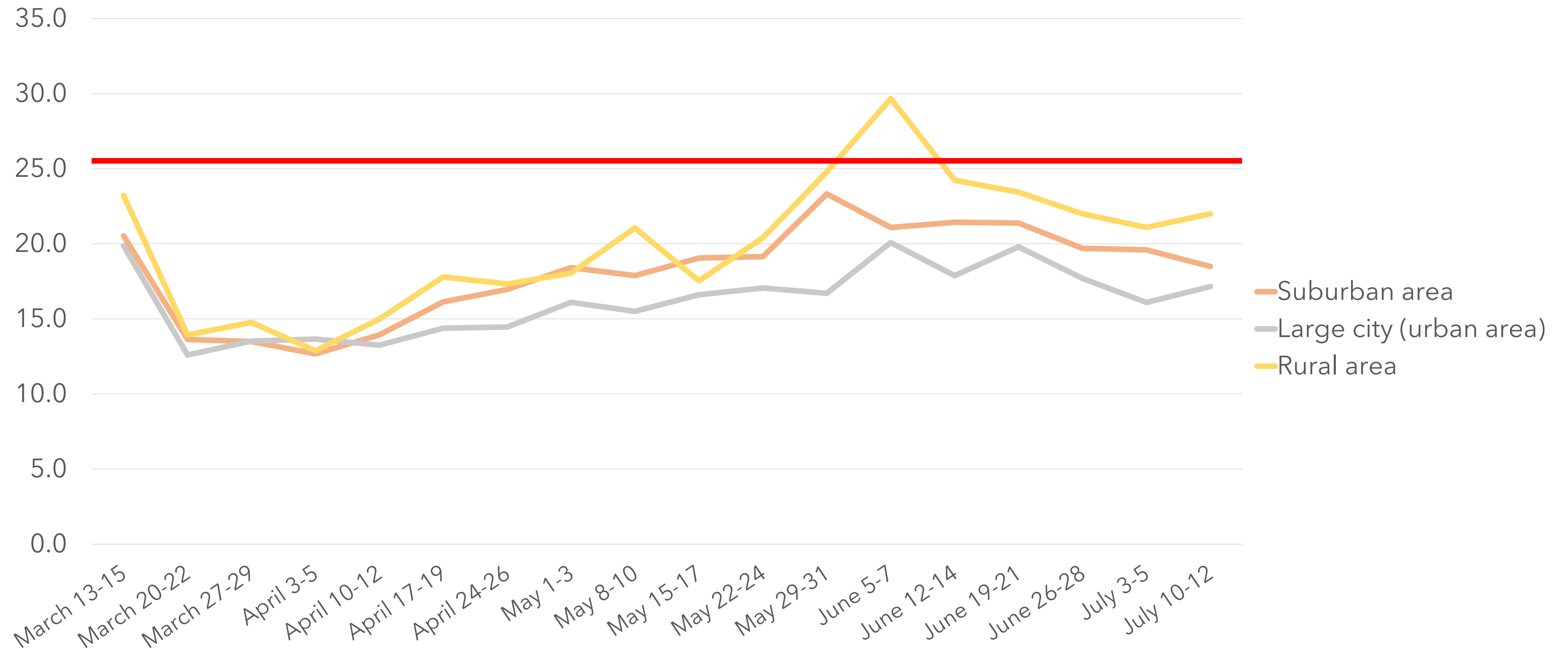
- The Midwest continued to index highest amongst US regions and saw a notable increase this week.
- The West and Midwest regions showed a slight decrease in safety concerns this week.
- The Midwest showed the most excitement for travel and openness to travel messaging this week.



Type Of Residence

Points of Interest:

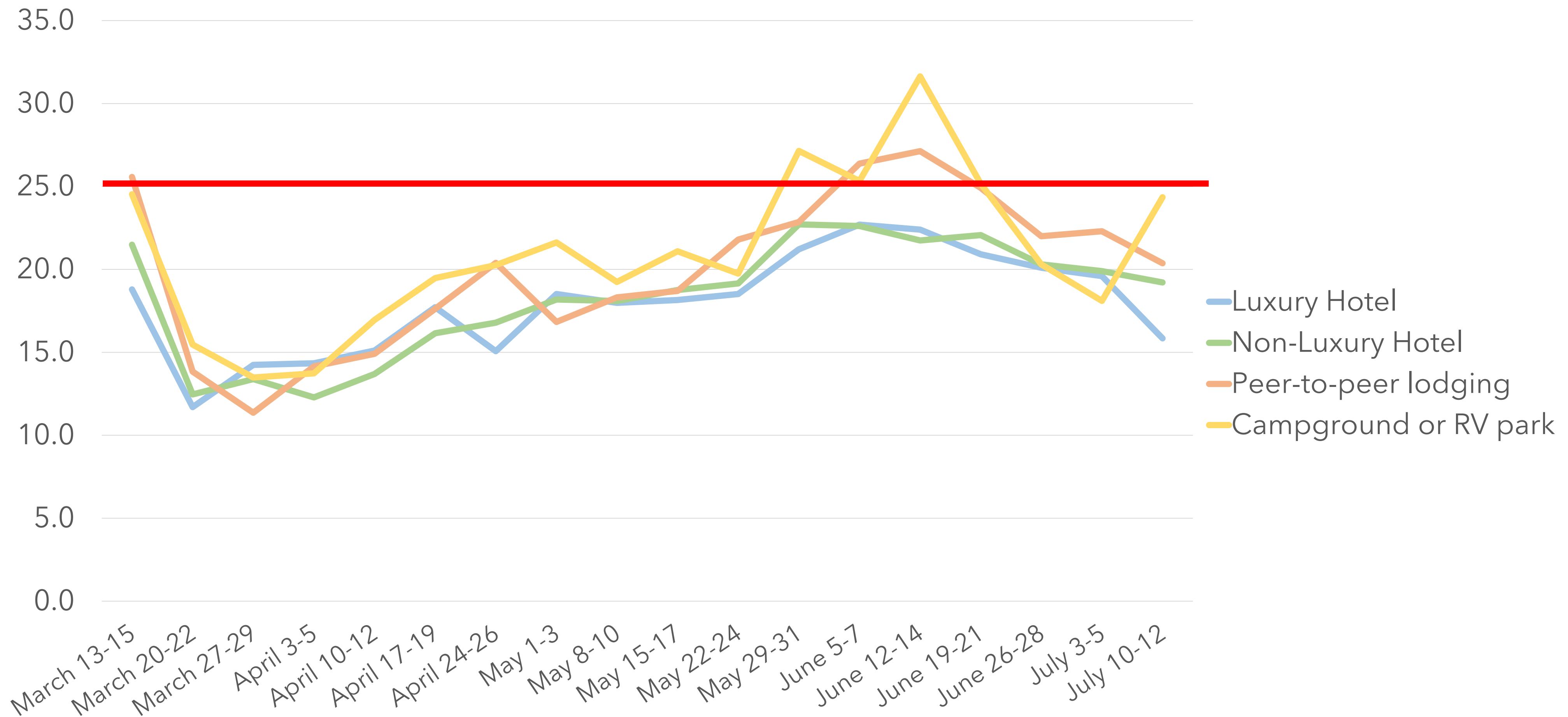
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Suburban respondents reported a slight increase in safety concerns this week.
- Urban respondents were the most likely to report a Federal tax credit would increase their likelihood of taking a trip.



Lodging Type Used in last 2 years

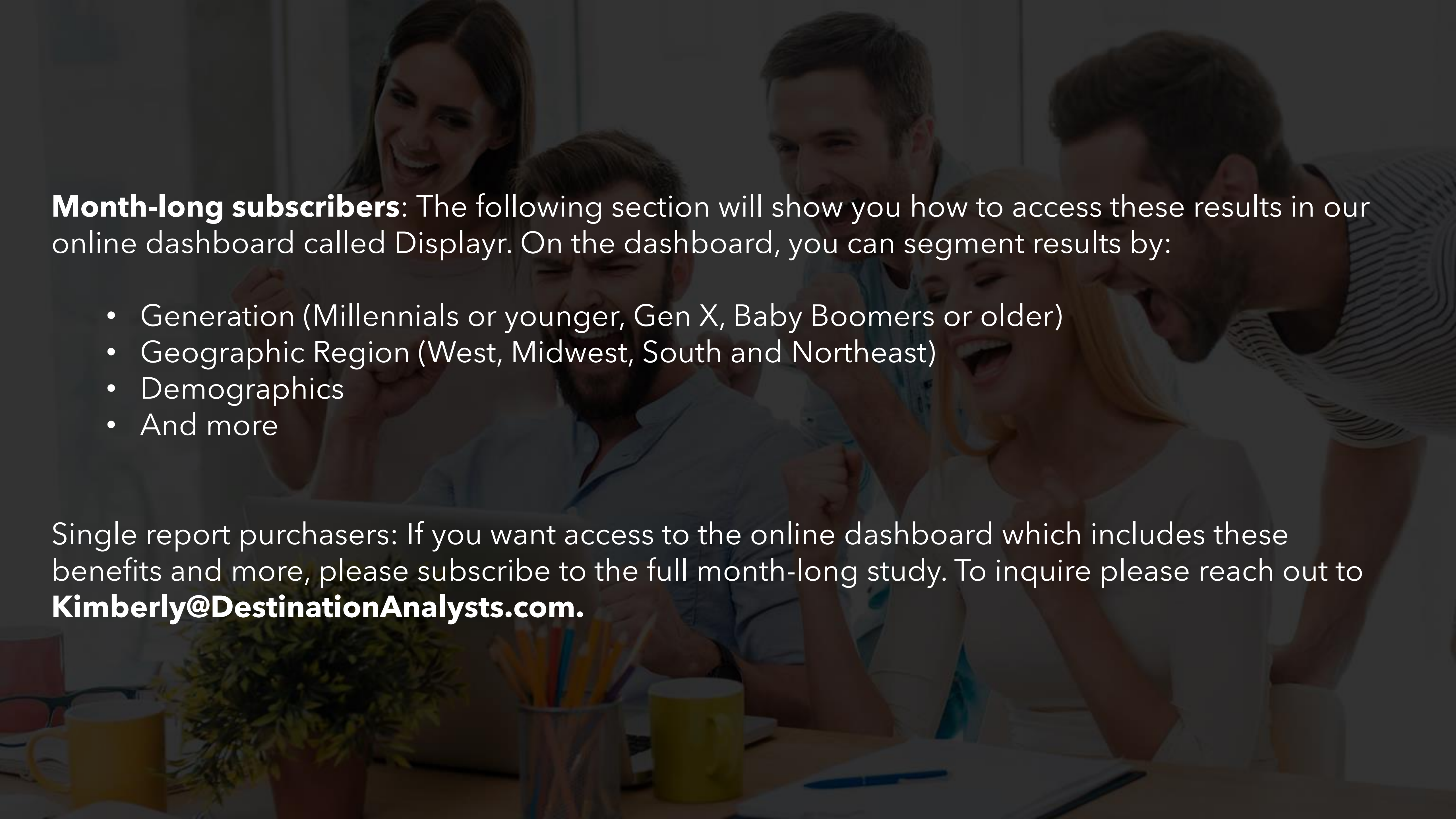
Points of Interest:

- Campground respondents indexed highest amongst lodging types and saw a significant increase this week.
- Even with a relative drop in average index score, Luxury Hotel respondents were again the most likely to say they'd be likely to take a trip they hadn't already considered if a good opportunity presented itself.





Data Tables



Month-long subscribers: The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

- Generation (Millennials or younger, Gen X, Baby Boomers or older)
- Geographic Region (West, Midwest, South and Northeast)
- Demographics
- And more

Single report purchasers: If you want access to the online dashboard which includes these benefits and more, please subscribe to the full month-long study. To inquire please reach out to **Kimberly@DestinationAnalysts.com**.

HOW TO USE DISPLYR

Guidelines on viewing, segmenting
and exporting data from the
dashboard.



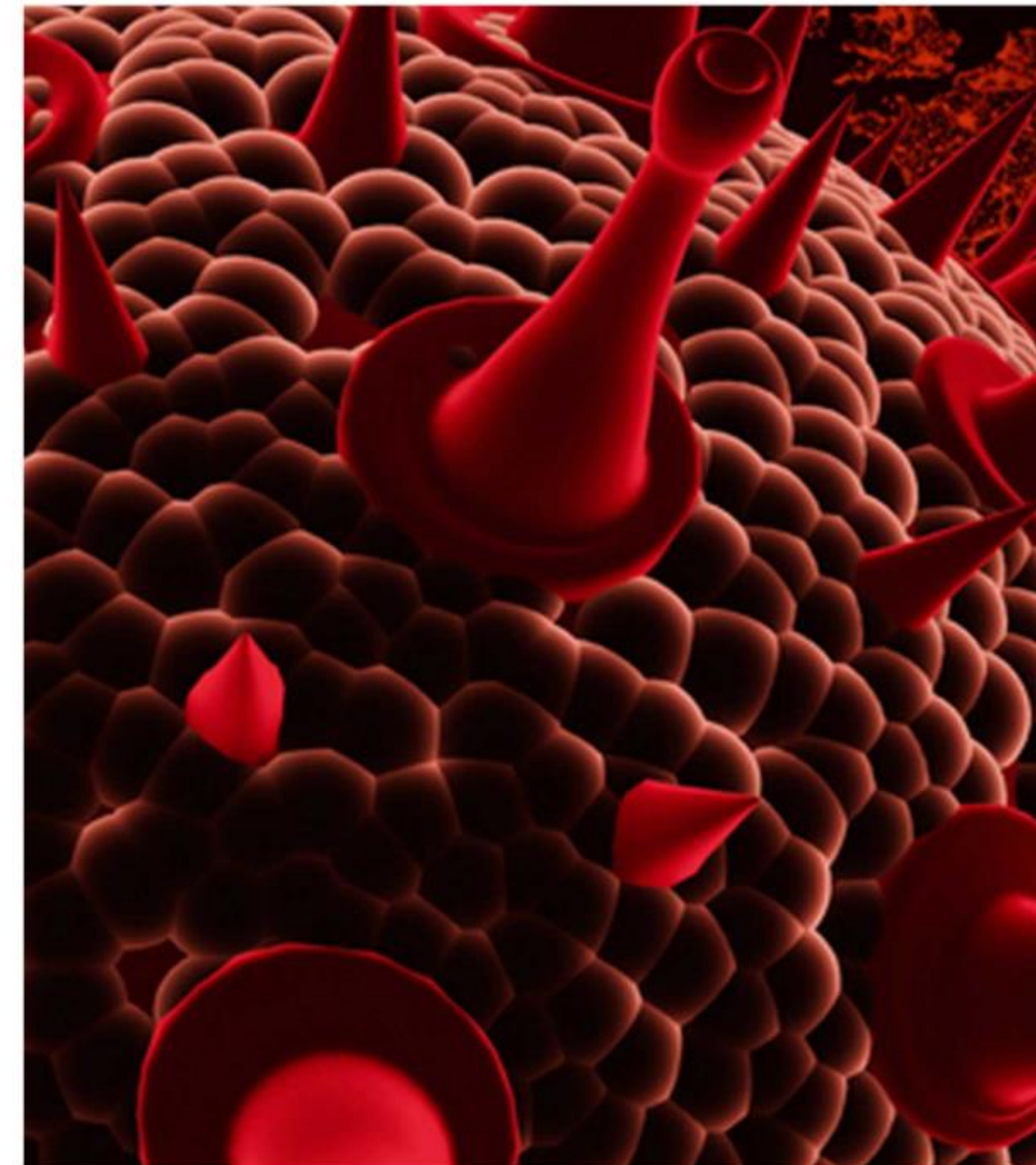
60%	CTMX	0.45	▲	+0.45%
	FTR	-0.23	▼	-2.34%
	CSCO	-1.01	▼	-1.89%
	CHK	0.02	▲	+0.21%
	AAPL	+2.58	▲	+3.05%
	PRTG	-0.14	▼	-1.42%
	AMZN	-0.73	▼	-0.90%
	TSLA	+1.08	▲	+5.12%
	AVGO	-0.87	▼	-3.88%
	SIRI	-0.65	▼	-1.37%

NAVIGATING THE DASHBOARD:

Toggle between the report sections by clicking on the header(s) in this navigation pane

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



Search...

Filters ▾ Export ▾ ?

- 65% +

Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

NAVIGATING THE REPORT:

To view submenu data points in a particular section, click on the arrow to the left of the heading.

This allows you to jump to specific data points without having to scroll through the entire report.

Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ? - + %

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations
 - Anticipated Change in Coronavirus S
 - Anticipated Change in Coronavirus S
 - Perceived Safety of Travel Activities
 - Perceived Safety of Travel Activities -
 - Avoiding Travel Until the Crisis Blow:
 - Avoiding Travel Until the Crisis Blow:
 - Expectations for Summer Travel Sea
 - Expectations for Summer Travel Sea
 - Staycations as a Replacement for Va
 - Staycations as a Replacement for Va
 - Road Trips as a Replacement for Air
 - Road Trips as a Replacement for Air
 - Regional Trips as a Replacement for
 - Regional Trips as a Replacement for
 - Avoiding Conferences or Conventior
 - Avoiding Conferences or Conventior
 - Avoiding International Travel
 - Avoiding International Travel - Break
 - Comfort Enjoying Home Community
 - Comfort Enjoying Home Community
 - Discounts Drive Interest in Travel
 - Discounts Drive Interest in Travel - B
 - Upcoming Travel Plans



FILTERING THE REPORT:

To segment the results by a specific group (generational, geographical, etc.)
Click on "Filters" in the top right corner.



IMPORTANT NOTE: When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

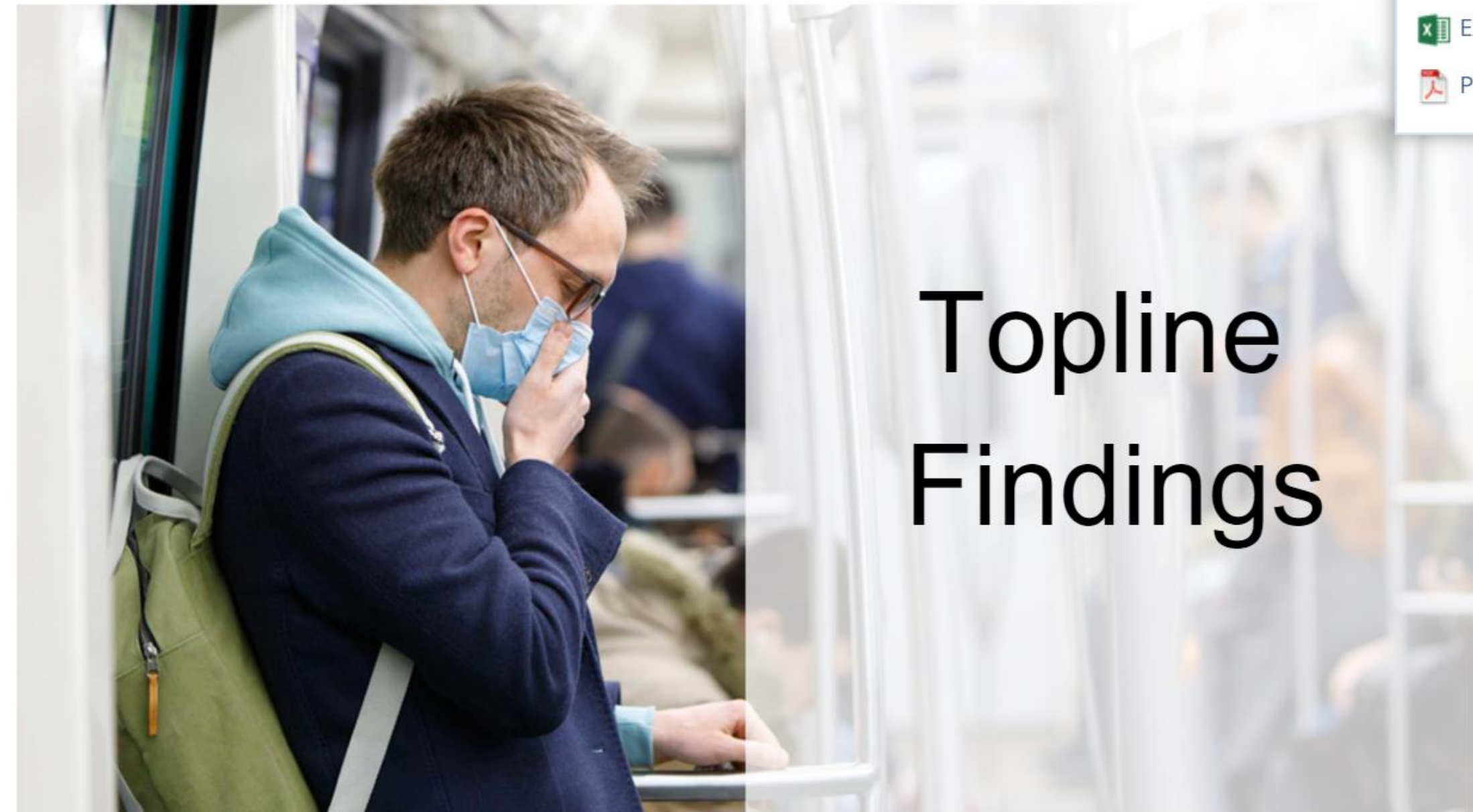
EXPORTING THE DATA:

To share the results with others in your organization, click on "Export" in the top right corner and select your preferred file type (PowerPoint, Excel or PDF).

If you want to export a specific report section, be sure to select it in the navigation pane BEFORE you click "Export"

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
 - Concerned Personally
 - Concerned Personally - Breakout
 - Concerned for Friends/Family
 - Concerned for Friends/Family - Brea
 - Concerned for Personal Finances
 - Concerned for Personal Finances - B
 - Concerned for National Economy
 - Concerned for National Economy - B
 - Destinations Associated with Coron
 - Travel Affected by Coronavirus
 - How Travel Was Affected by Coronav
 - How Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Number of Trips Cancelled/Postpone
 - Number of Trips Cancelled - Breakou
 - Number of Trips Postponed - Breakc
 - Month of Trips Cancelled
 - Month of Trips Cancelled - Breakout
 - Refunds for Cancelled Reservations
 - Rescheduled Postponed Trips
 - Month of Rescheduled Postponed Tr
 - Month of Rescheduled Postponed Tr
 - Type of Trips Cancelled Or Postpone



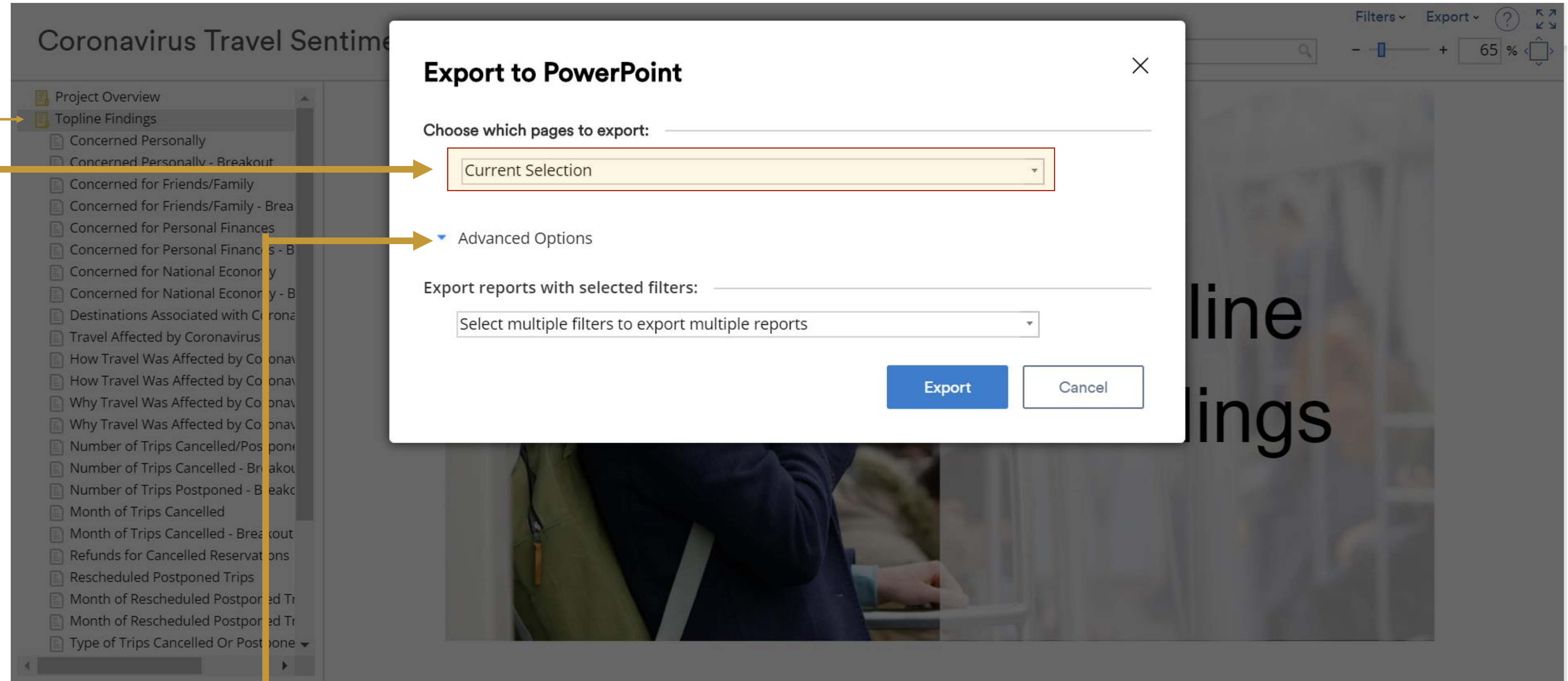
Topline Findings

EXPORTING THE DATA:

After selecting your preferred file type, Displayr will prompt you to select "Current Selection" or "All"

"Current Selection" will only export the single data point you are viewing (or an entire report section if it is selected in the navigation pane as shown in this screenshot).

"All" will allow you to download the entire report.



IMPORTANT NOTE: Use the "Advanced Options" to apply specific filters to the data you want to export.

NEED MORE HELP?

If you have any additional questions about using Displayr
please reach out to our dashboard expert:

Chingun Ganzorig

Research Manager

Chingun@DestinationAnalysts.com

(415) 722-2503

