CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 20

RESEARCH FINDINGS

July 27, 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 20th 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 20^{th} wave of this survey was collected from July 24-26, 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, 1,206 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of \pm 0.



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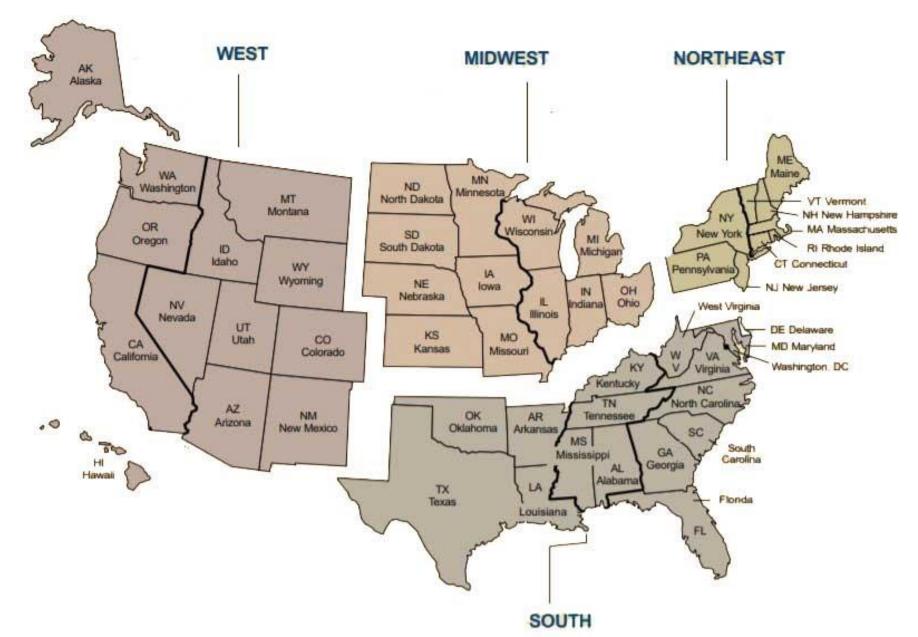


Project Overview

Data weighting. The survey sampling plan used in this project collected approximately 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

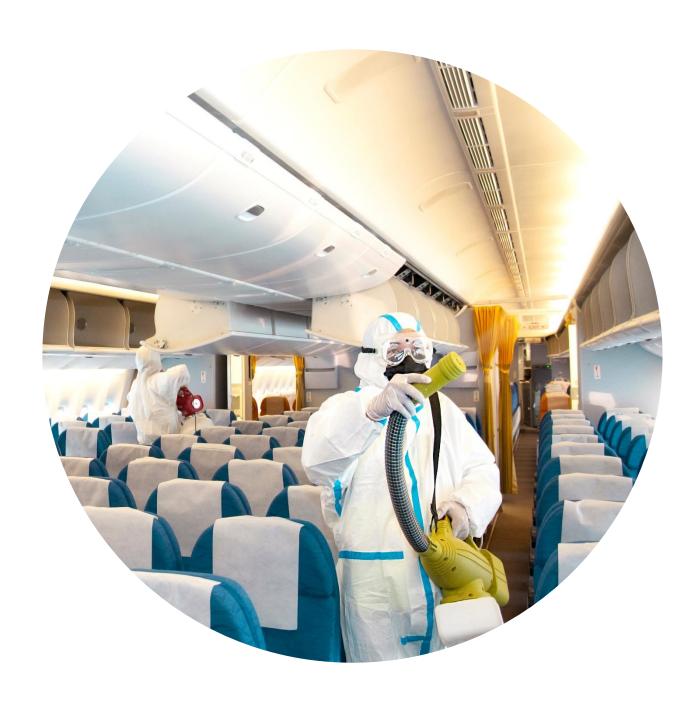
The following are the top takeaways that emerged from Wave 20 of this weekly consumer traveler sentiment tracking study.

- A few important travel metrics positively increased this week: excitement for near-term travel, openness to travel inspiration, and the number who say they will take a trip in 2020.
- Now 55.4 percent of American travelers say they have at least tentative trip plans for the remainder of 2020, up from 53.3 percent last week.
- Looking at the anticipated timing of their next trips, 18.2 percent of American travelers expect they may take their next road in August.
- In considering a leisure trip in the next six months, American travelers reported that they would most likely stay in a full-service or 3-4-star hotel (65.6%) or a luxury or 5-star hotel (43.2%). These two were also considered the relatively safest types of lodging for travel in the next six months, with approximately half of Americans saying a luxury hotel (51.2%) or a full-service hotel (47.9%) would be safest.





Top Takeaways



- The profile of those that recently traveled by air skews younger, urban dwellers that typically traveled for business and conventions in the pre-pandemic period.
- Those that have recently traveled by air (11.3%) largely rate their experience from a health and safety protocol standpoint as positive. Three-quarters of these recent air travelers said they were satisfied with the coronavirus safety protocols put in place by the airline(s) and 73.0 percent felt satisfied by those protocols instituted by the airport(s).
- More Americans are now agreeing with pandemic etiquette. This week, 80.6 percent of
 American travelers agreed people should wear face masks in public, up from 77.6 percent
 last week, and 87.9 percent up are being careful to socially distance, up from 85.6 percent.
 The reported frequency of mask wearing has also increased.
- Americans also increasingly say they will practice pandemic etiquette when traveling over the next six months, including wearing a face mask and following social distancing guidelines.

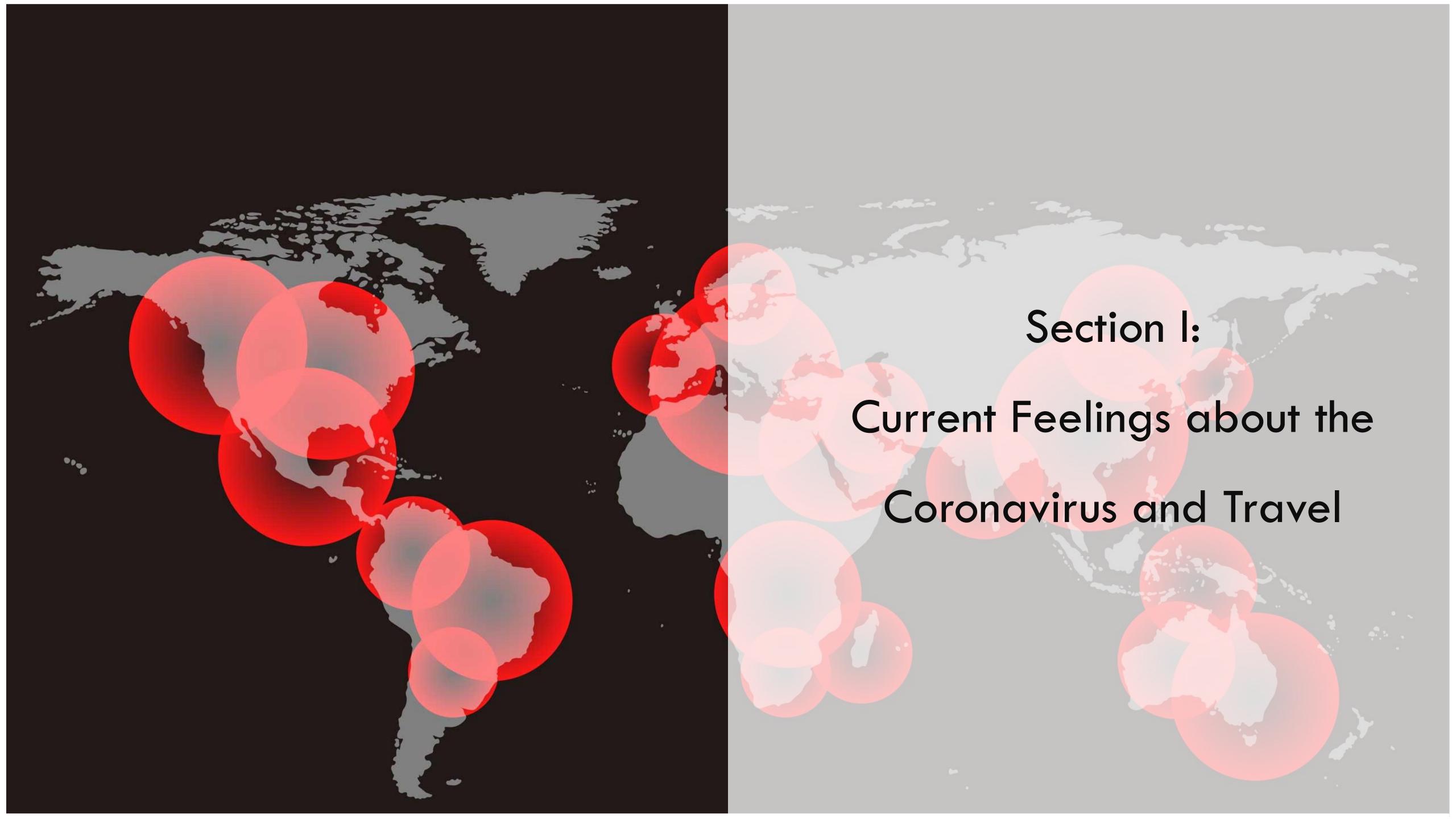


Top Takeaways

- Nevertheless, Americans feel marked stress from the pandemic. Overall, 44.8% report higher degrees of daily stress right now. Millennials seem to be absorbing this stress in more areas of their lives compared to older generations, being likelier to say they have felt lonely, sad, bored, easily upset, and worn out in the last month. This stress is a parasite on travel morale. Six in ten American travelers agree that if they were to travel now for leisure, they would not be able to fully enjoy it and half agree they have lost their interest in or taste for traveling for the time being.
- This (hopefully temporary) loss of a taste for traveling is somewhat more pronounced in Baby Boomers and travelers residing in the Western and Northeastern U.S.

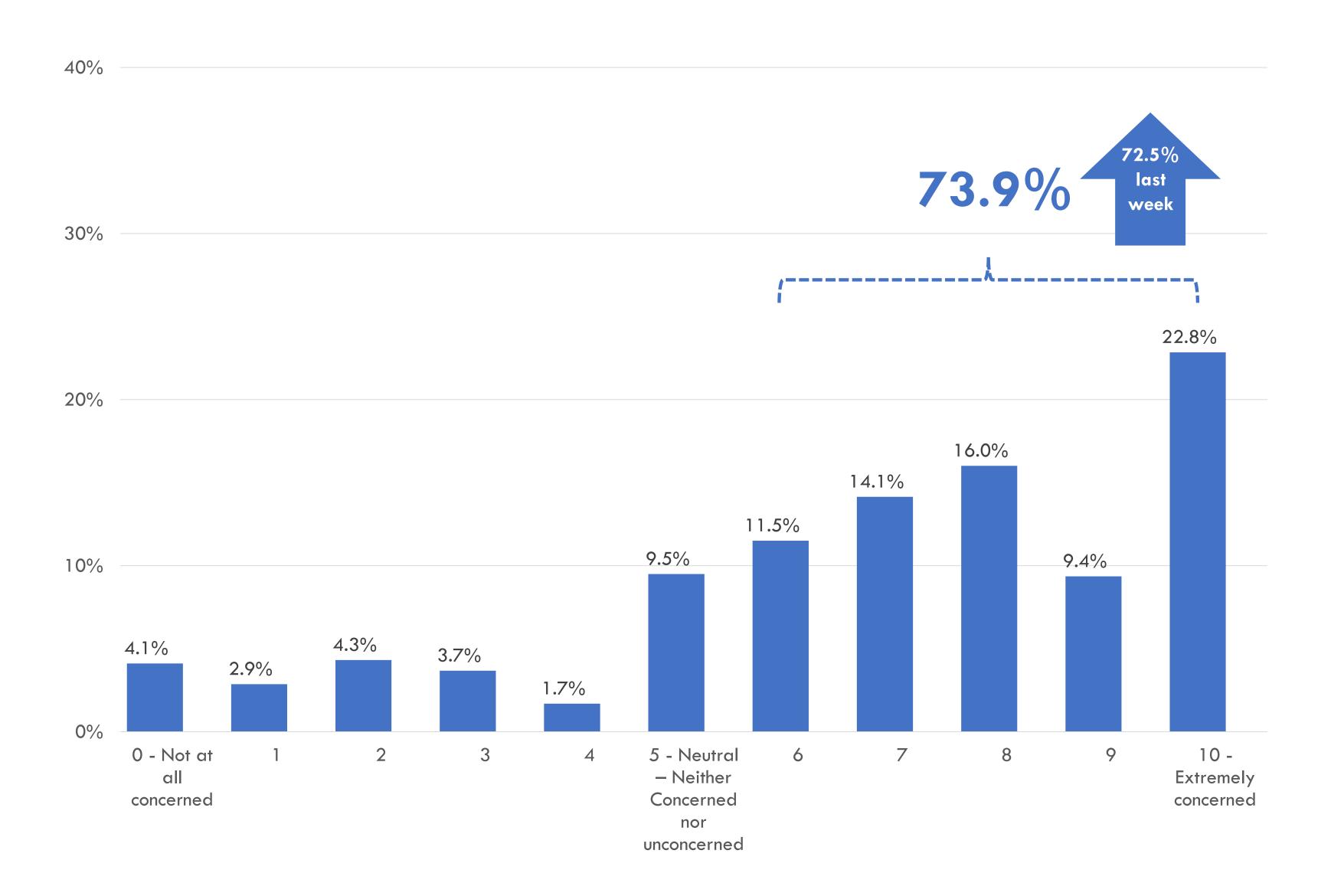






Personal Health Concerns

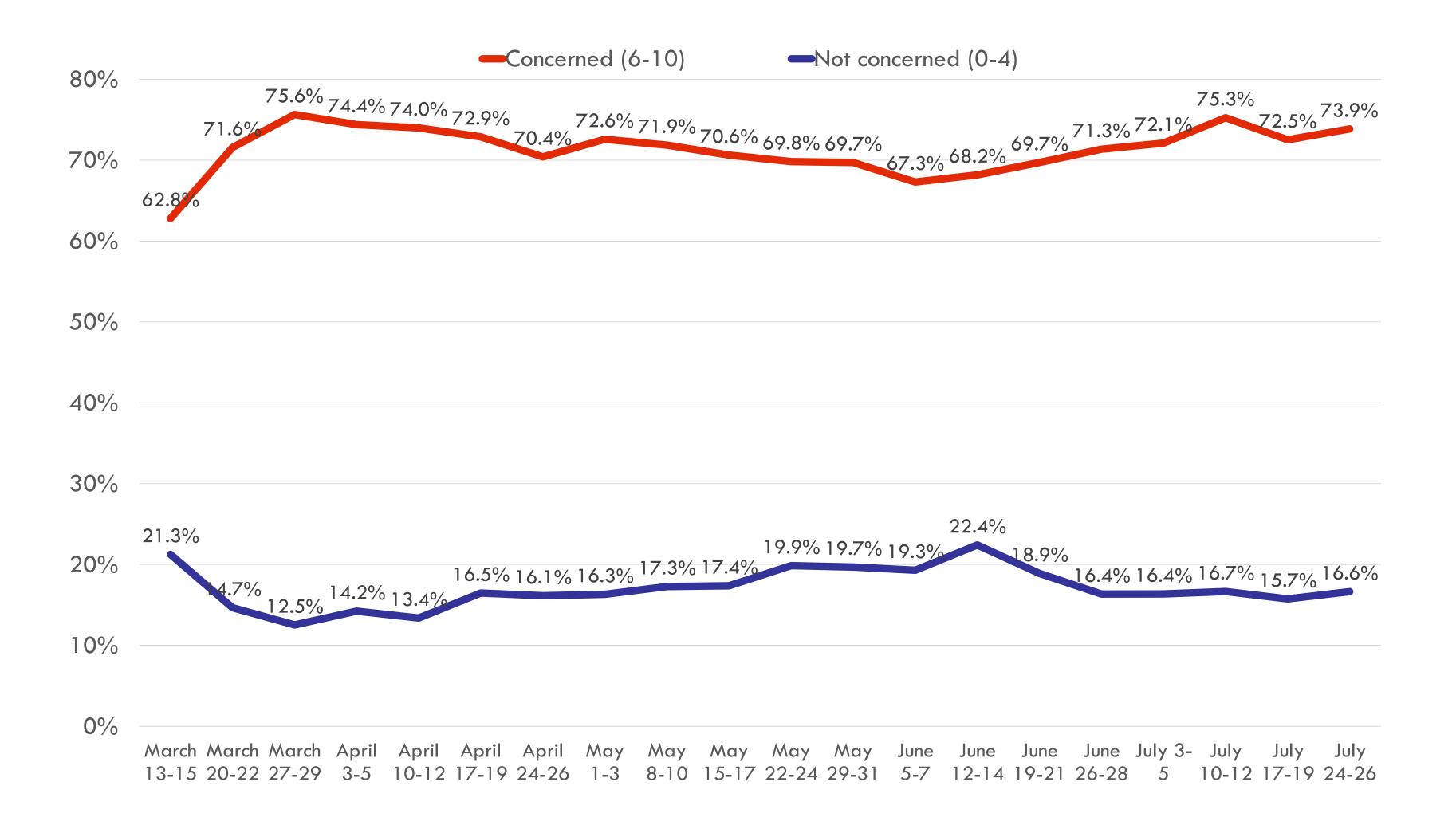
Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)





Personal Health Concerns

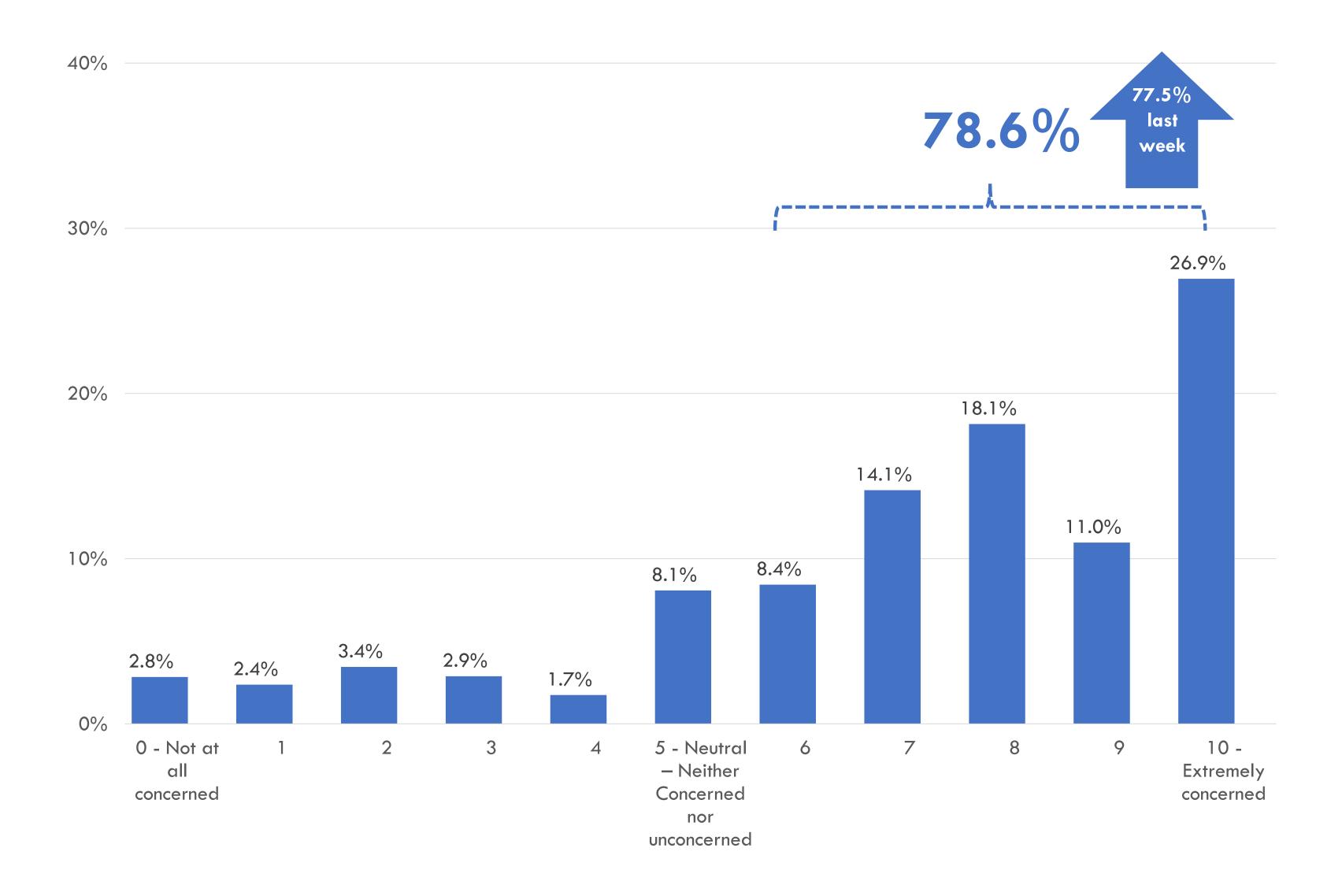
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Health Concerns (Family & Friends)

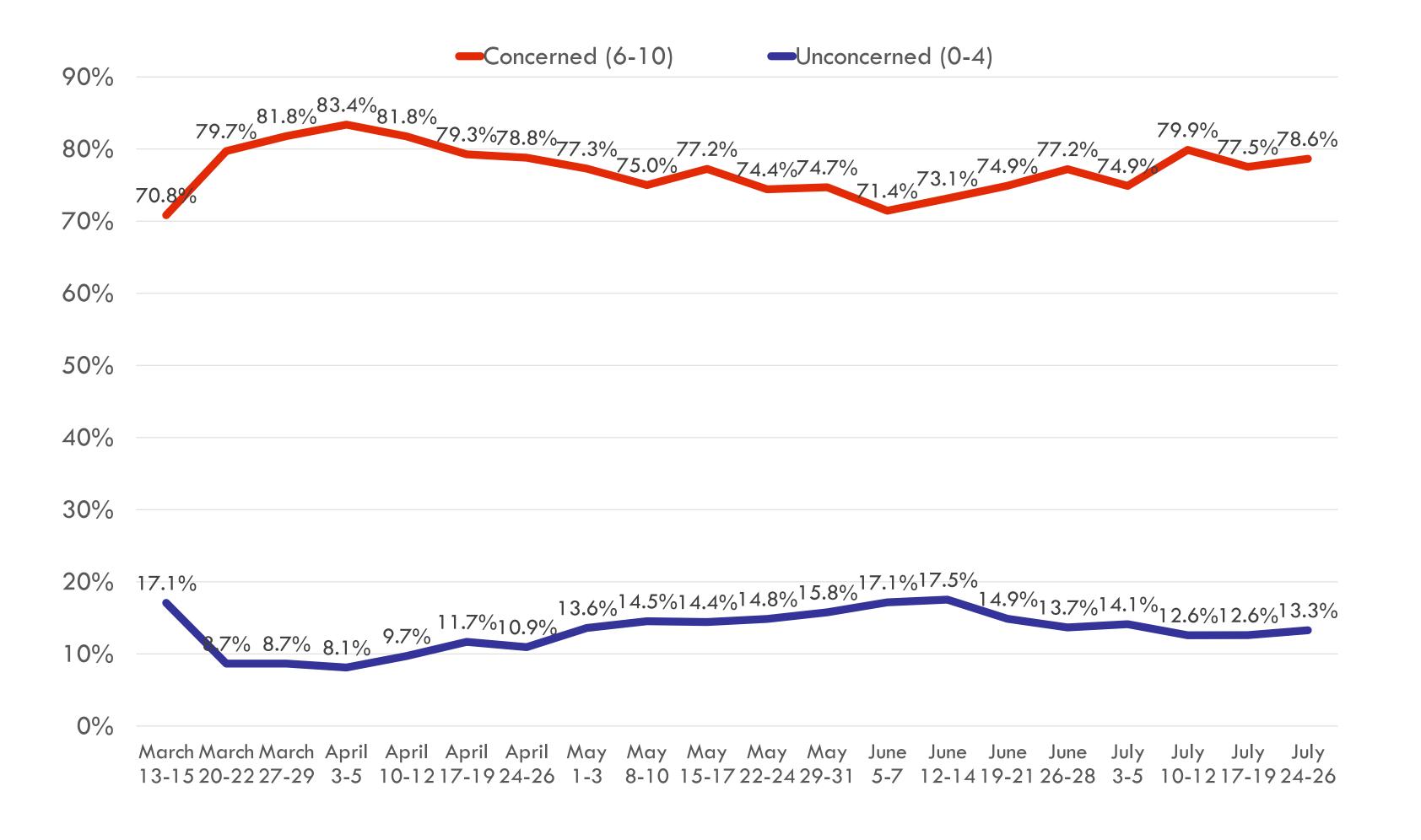
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)





Health Concerns (Family & Friends)

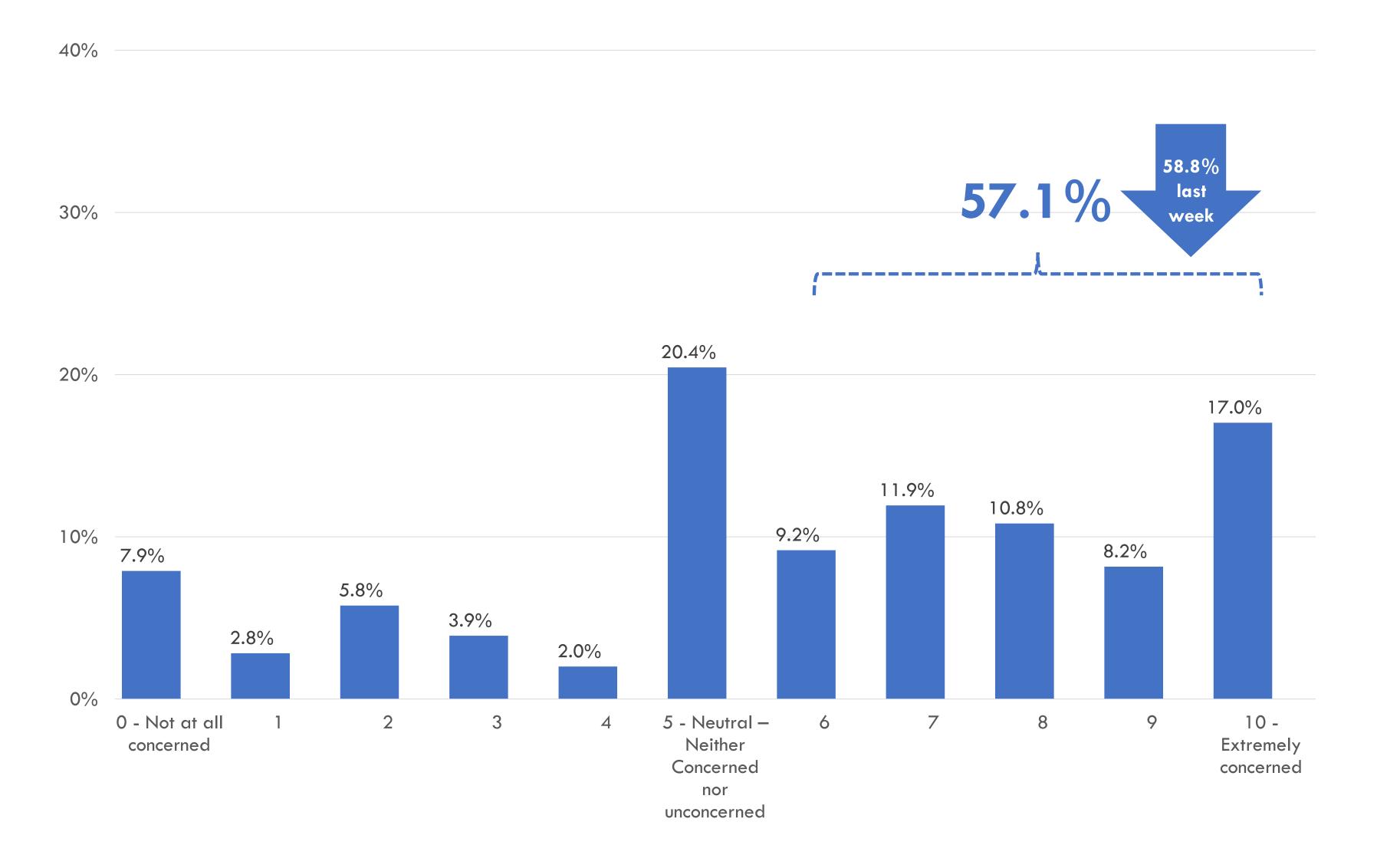
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Concerns About Personal Finances

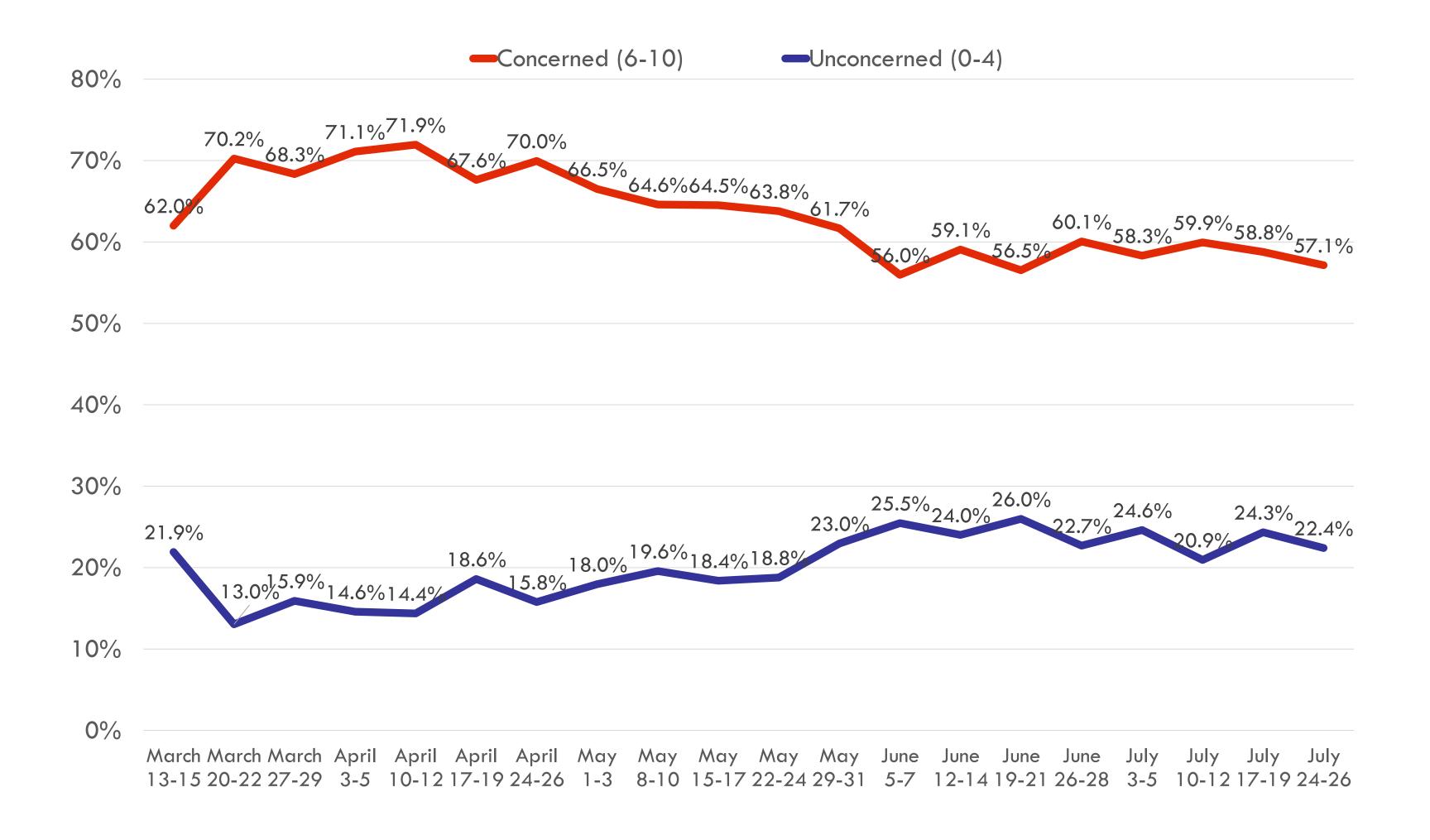
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES? (Please answer using the scale below)





Concerns About Personal Finances

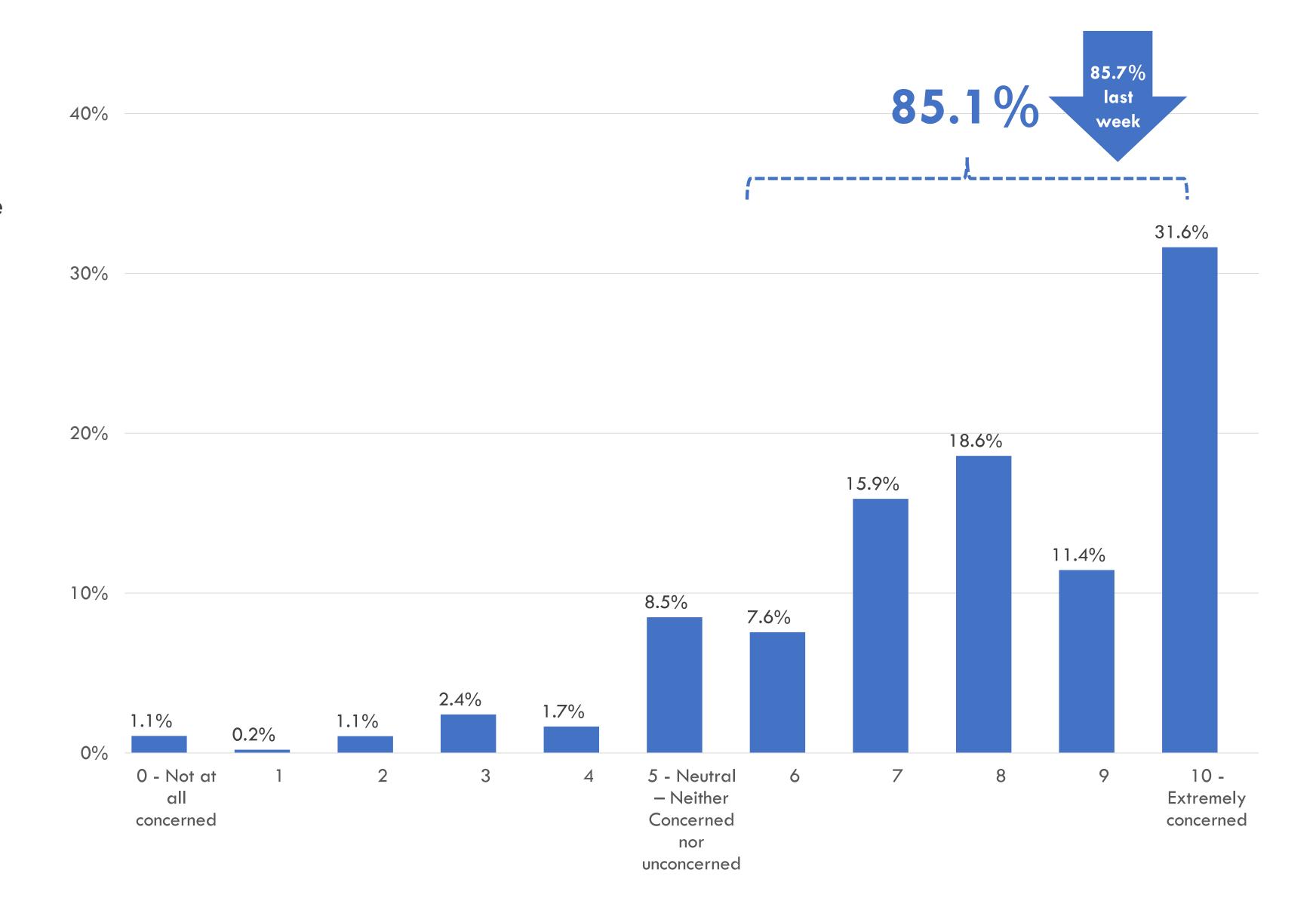
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES? (Please answer using the scale below)





Concerns About National Economy

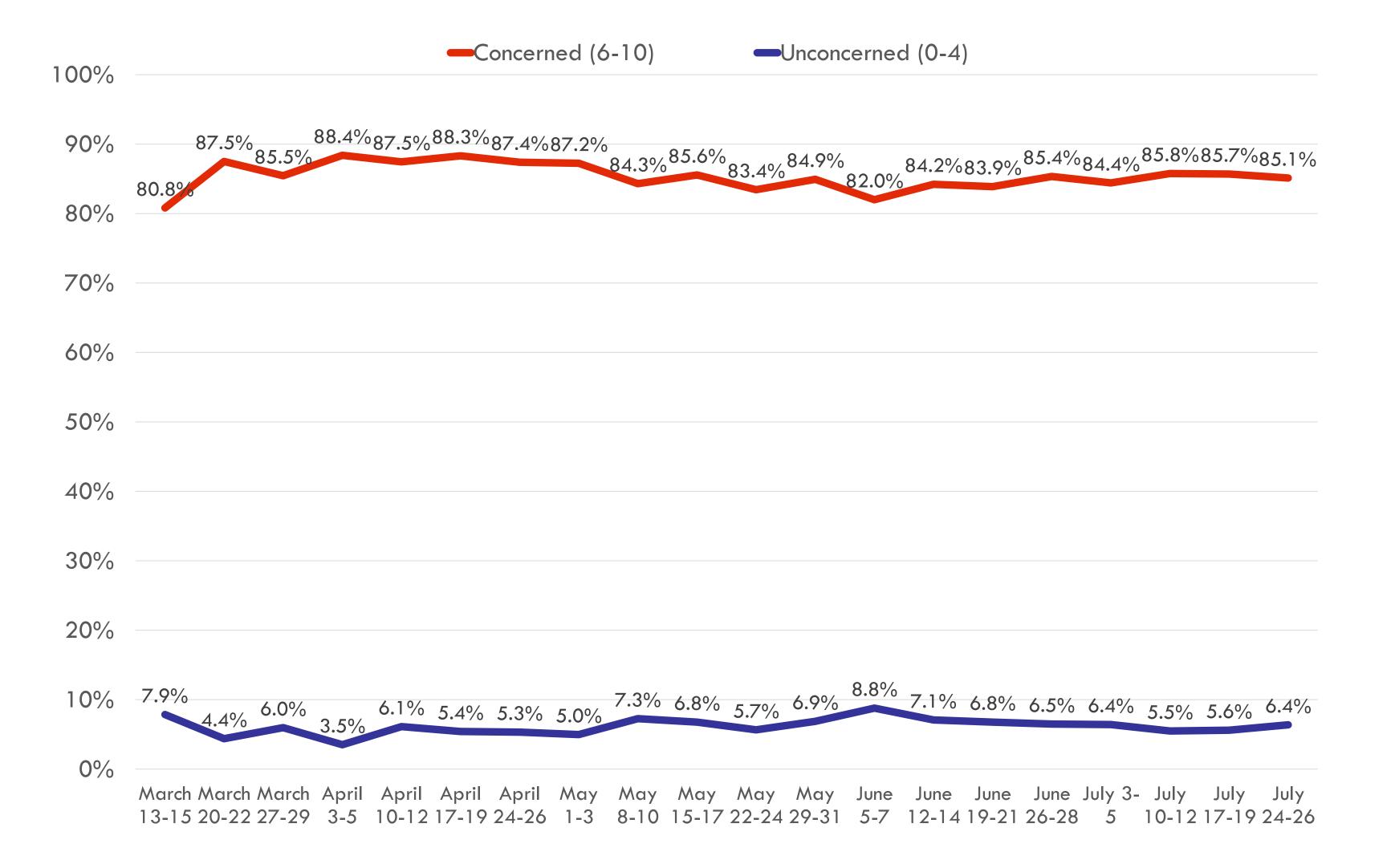
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?





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?



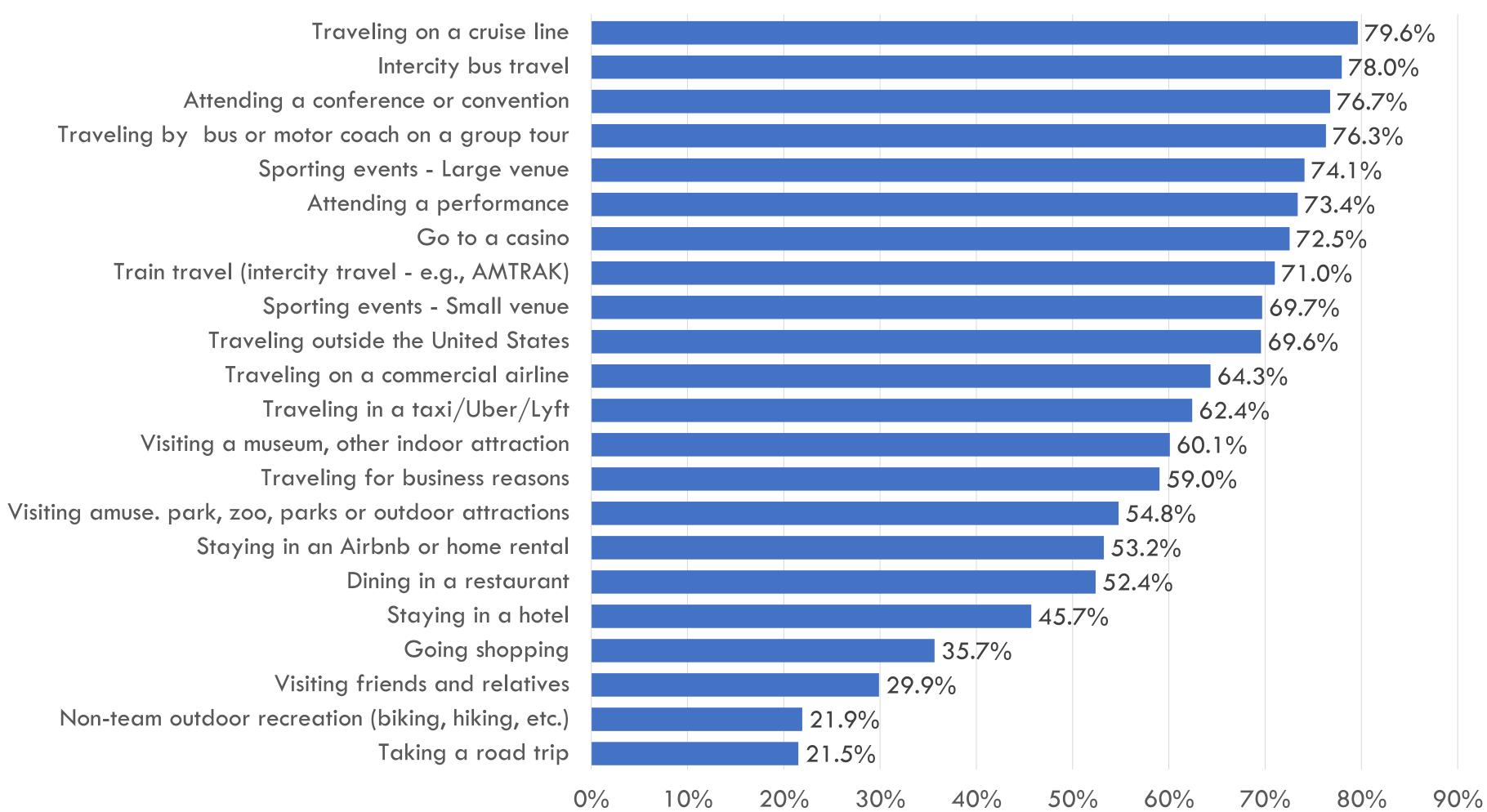


Perceived Safety of Travel Activities (Wave 20)

Question: At this

moment, how safe would you feel doing each type of travel activity?





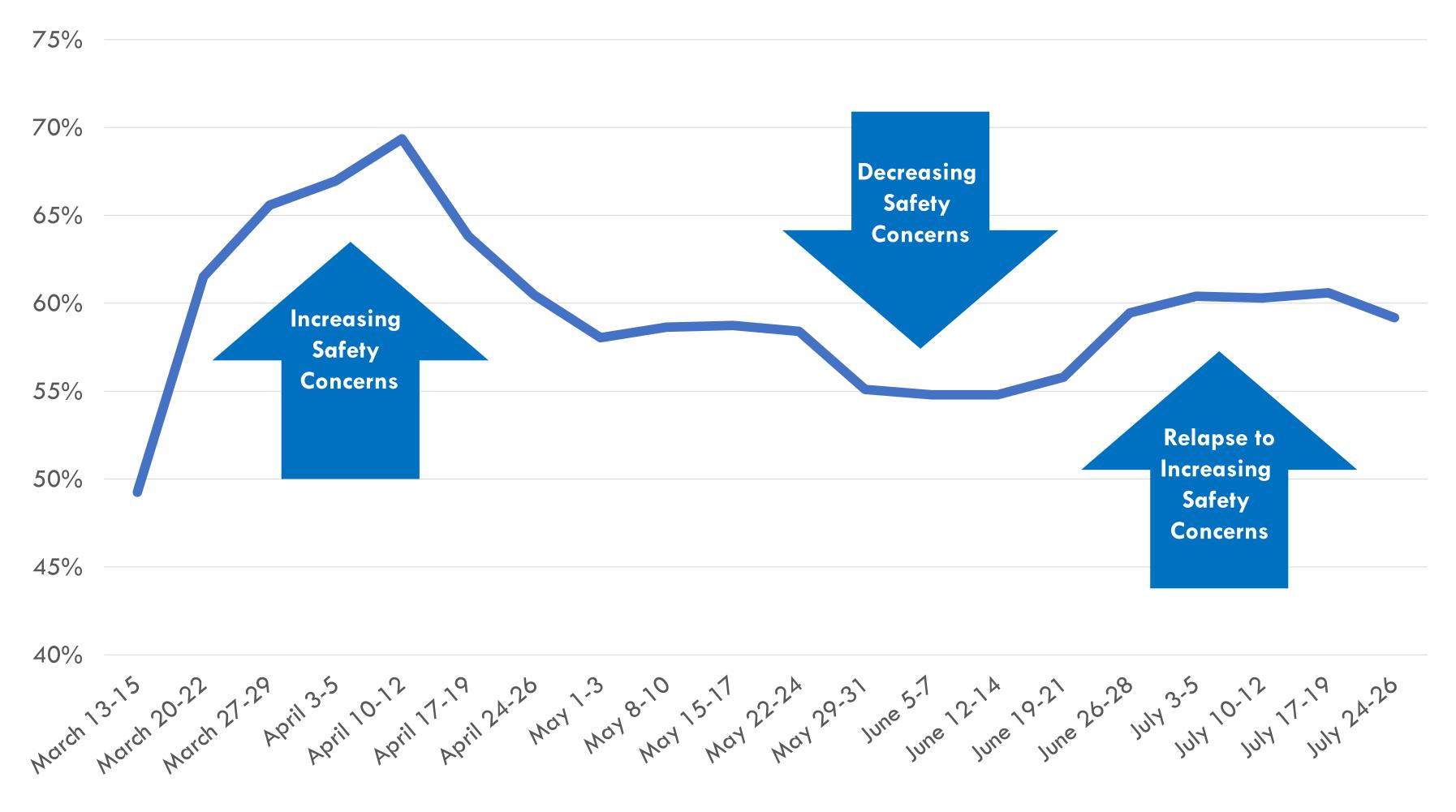


Perceived Safety of Travel Activities (Waves 1-20 Comparison)

Question: At this

moment, how safe would you feel doing each type of travel activity?





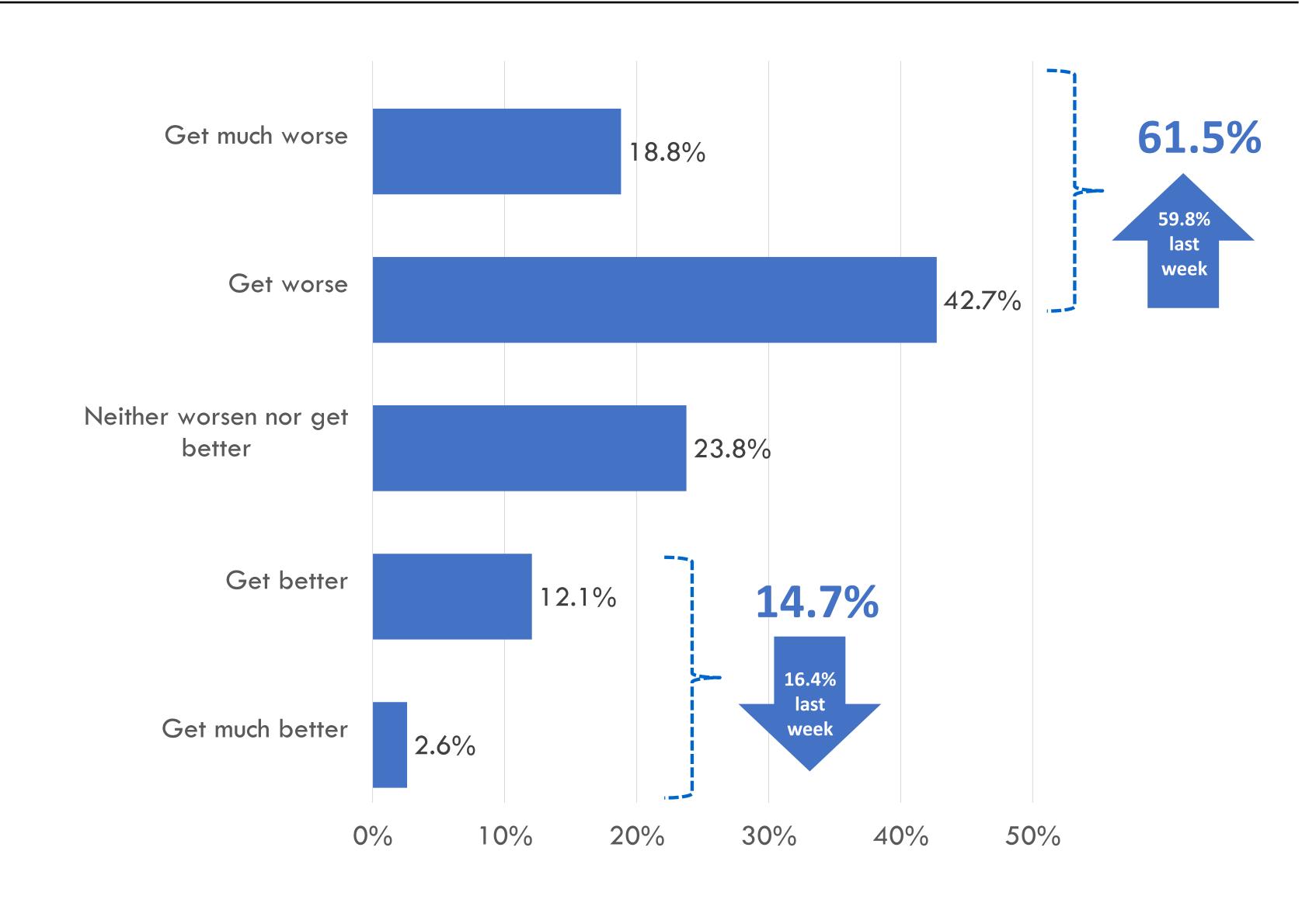


Expectations for the Coronavirus Outbreak

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 _____





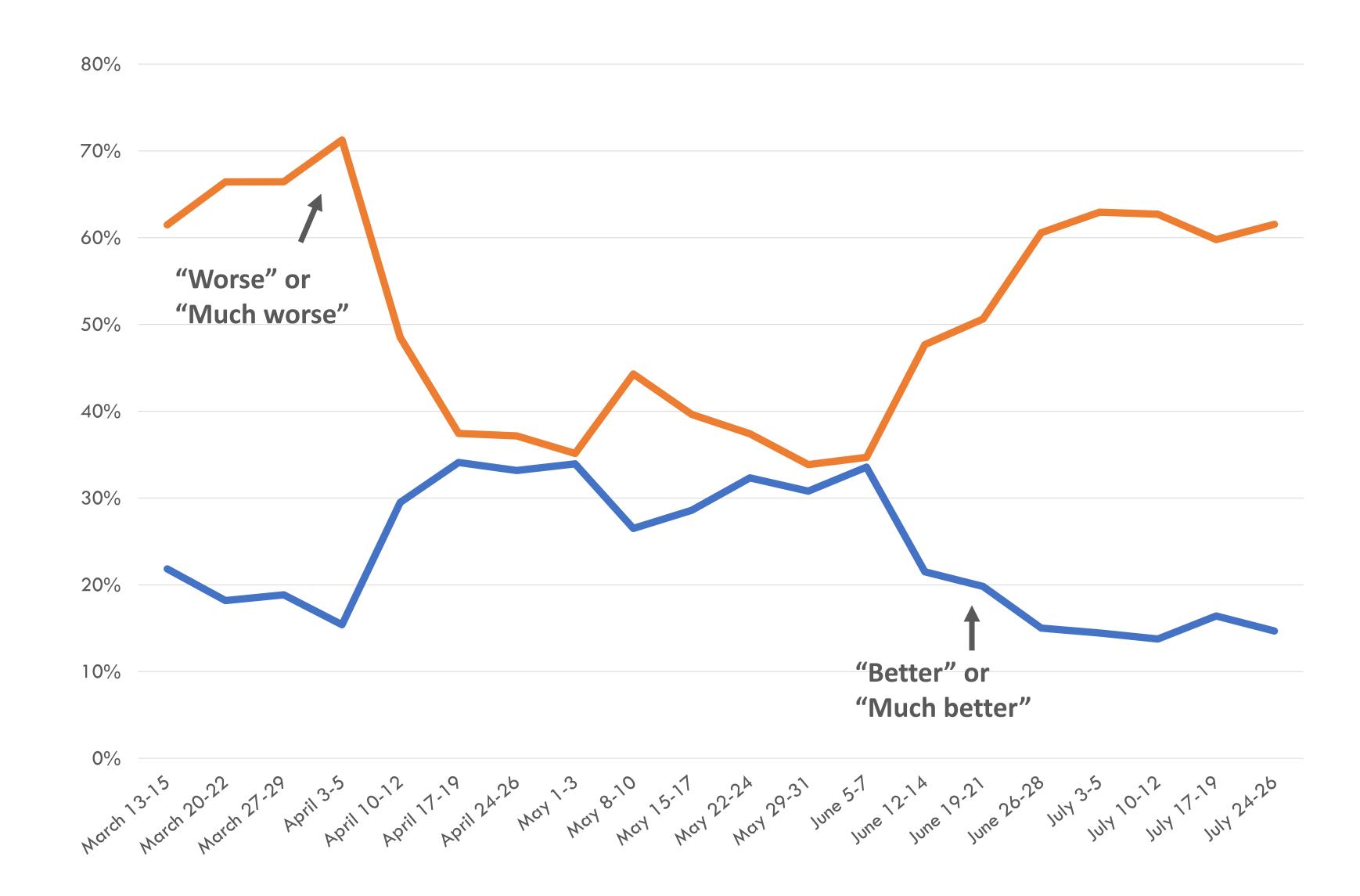
Expectations for the Coronavirus Outbreak

Question: In the NEXT

MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

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(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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

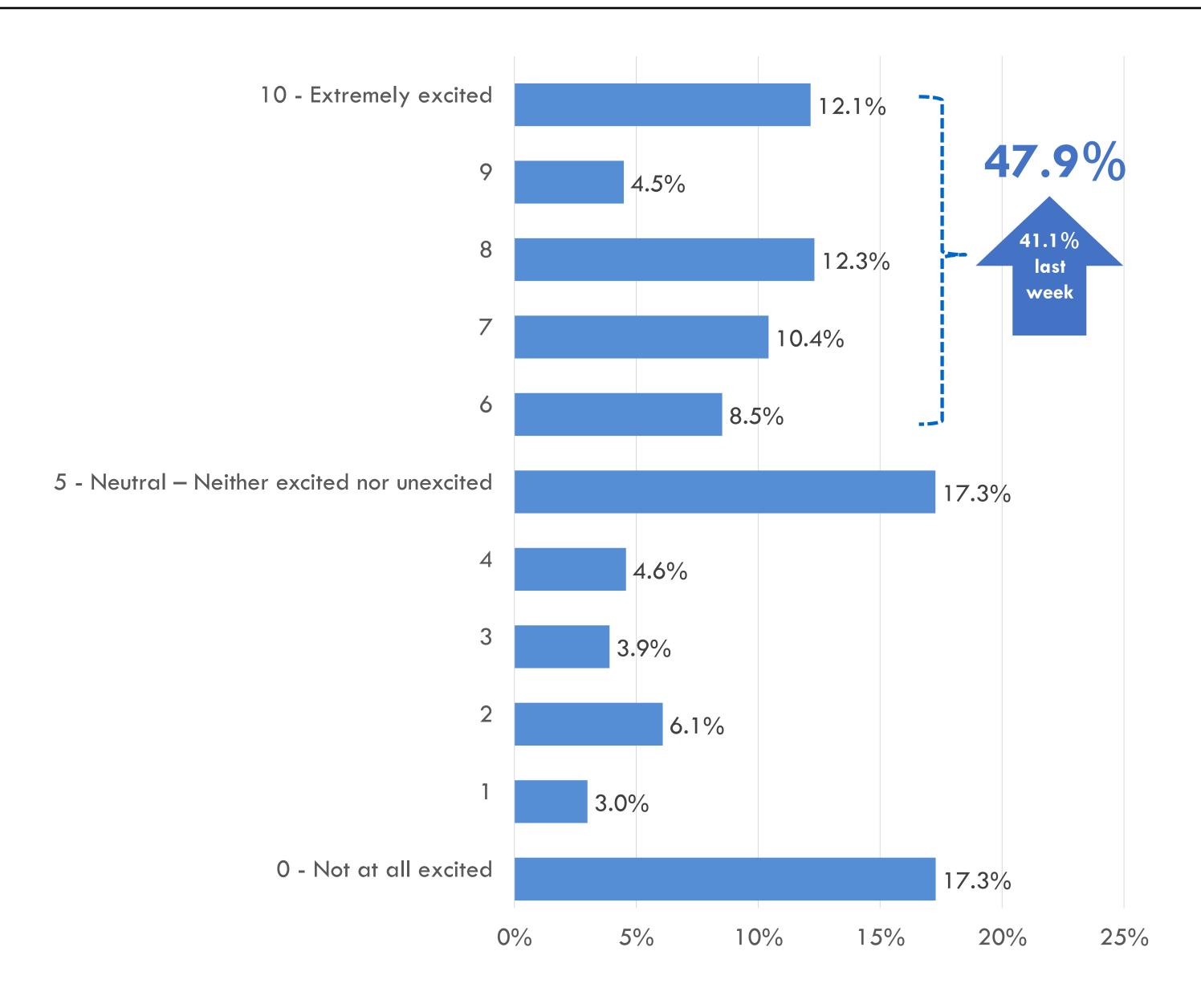




Excitement to Travel Now

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

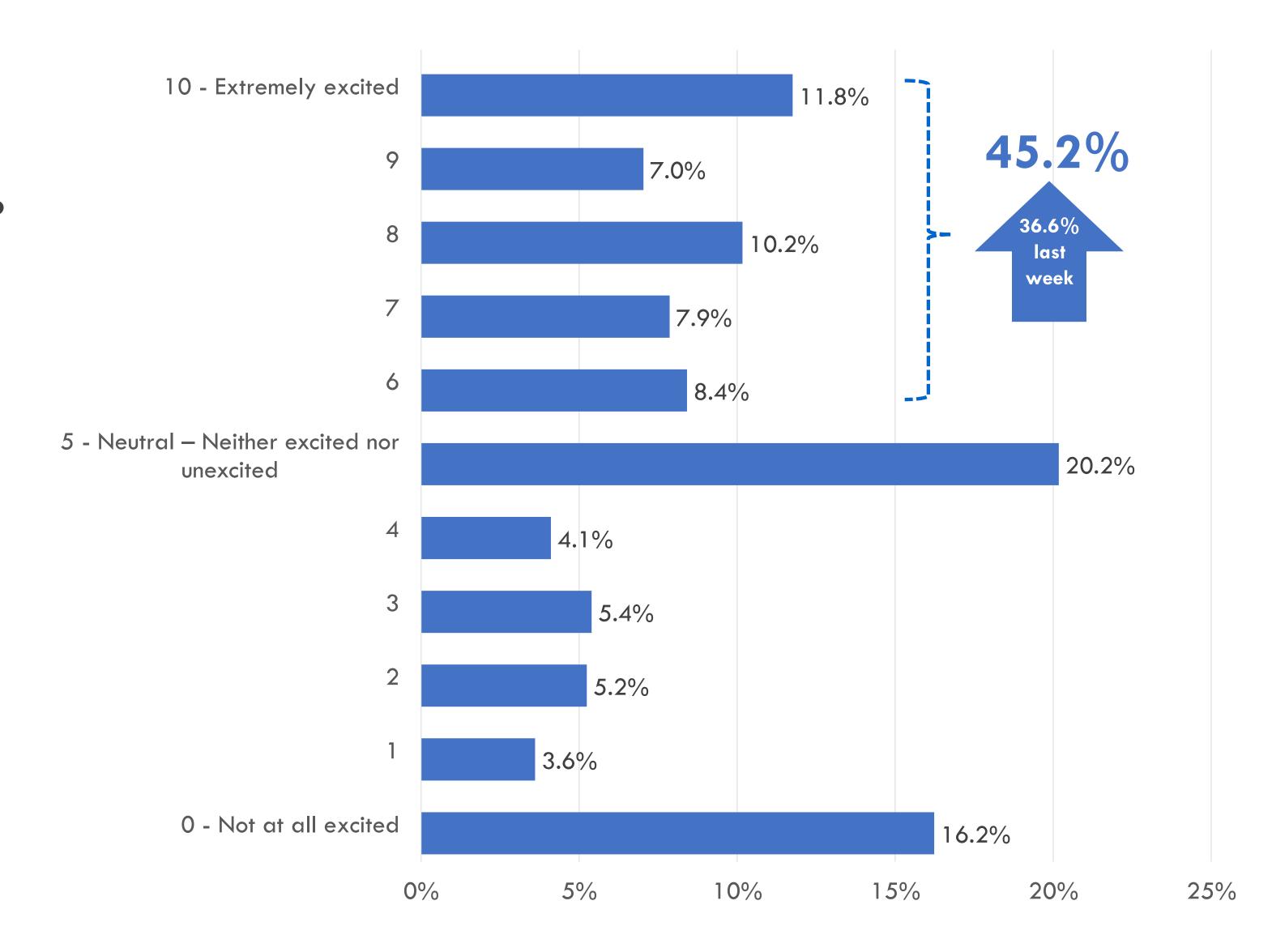
How excited would you be to go? (Assume the getaway is to a place you want to visit)





Openness to Travel Information

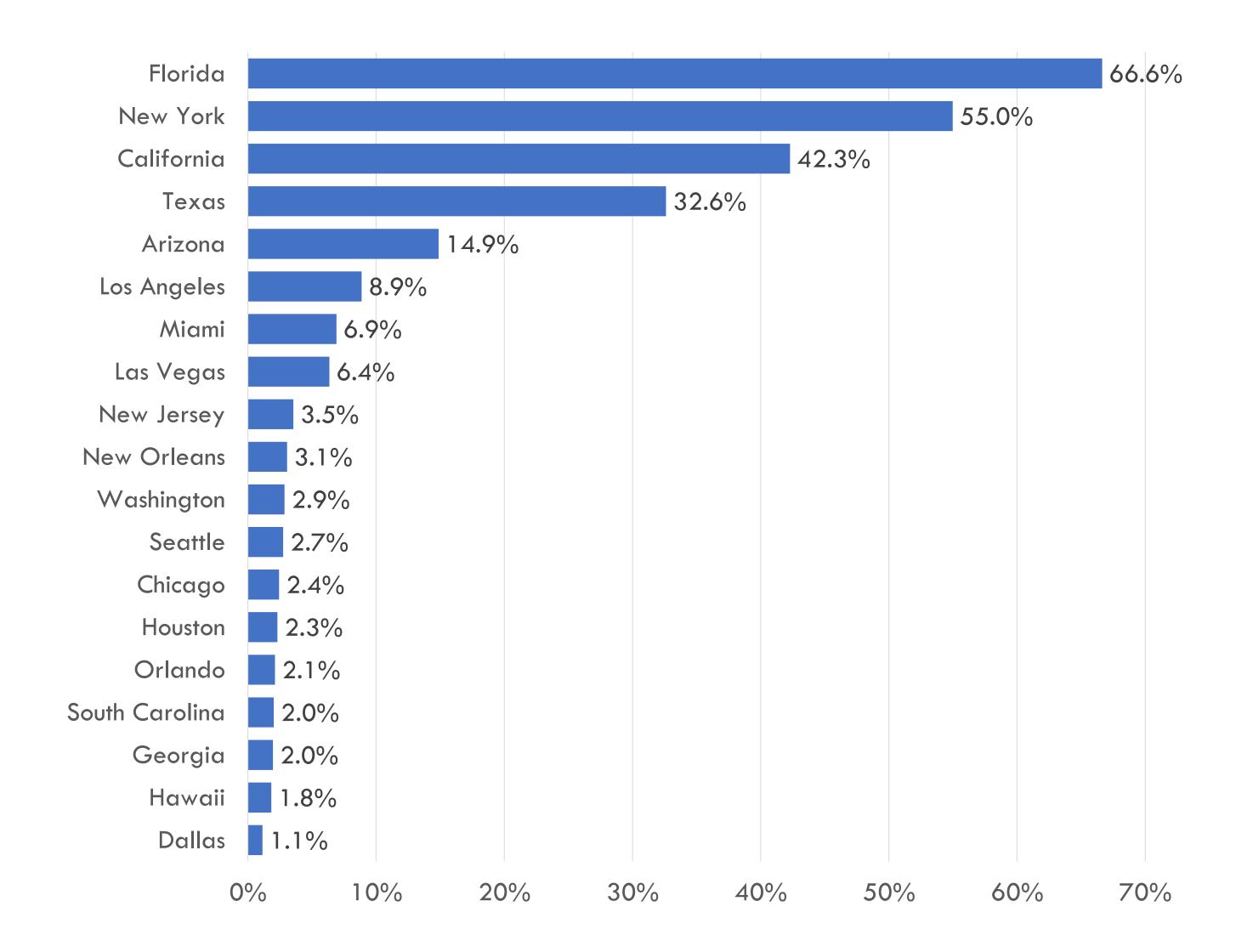
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?





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)

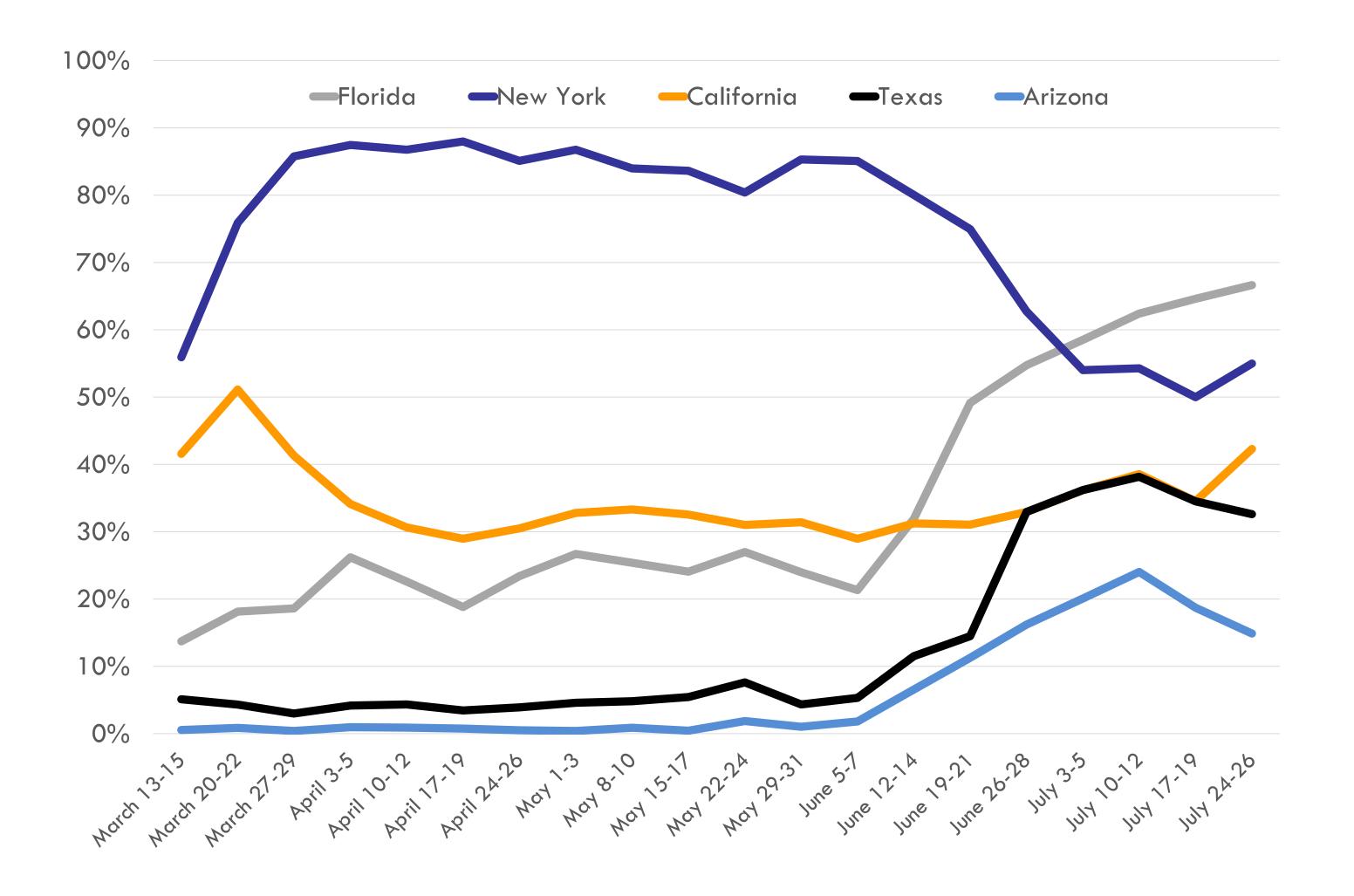




Most Talked About Coronavirus Hotspots

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: 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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

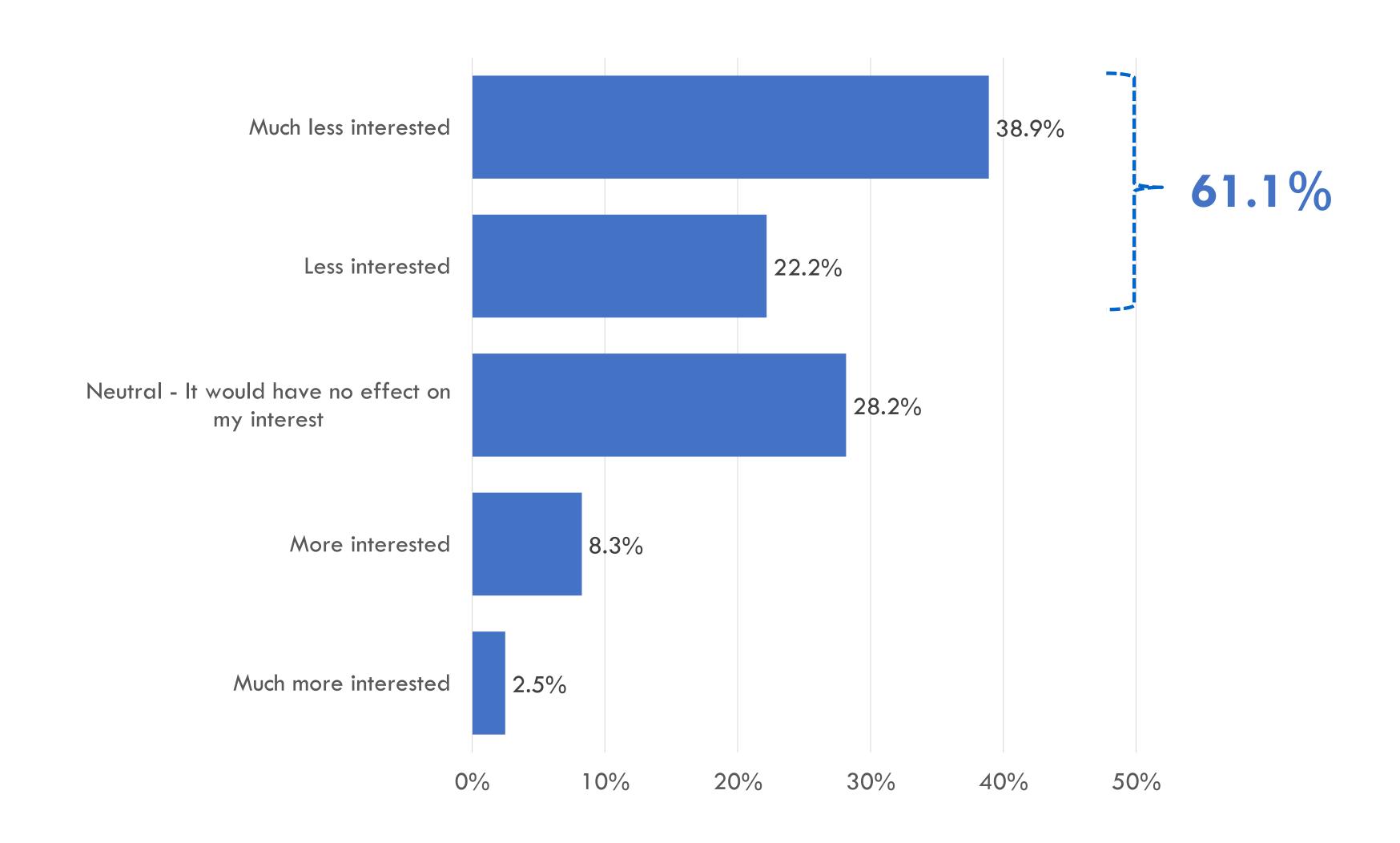




Impact of Coronavirus Issues on Future Intent to Visit

Question: Suppose a travel
destination you're interested in has
had difficulty managing the
Coronavirus situation.

How would this likely affect your interest in visiting that destination in the 6-month period immediately after the Coronavirus situation is resolved?





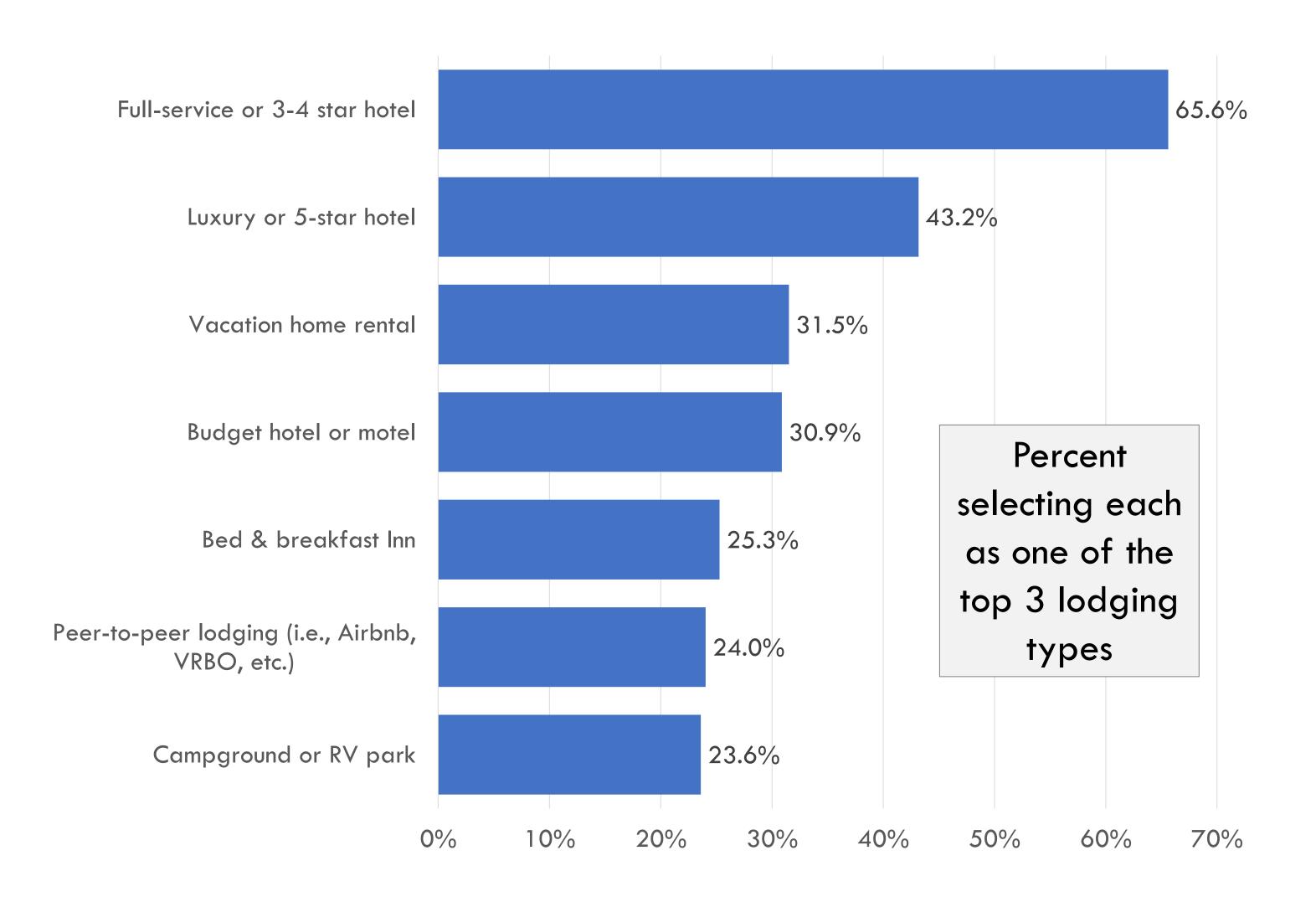
Types of Lodging They Would Use (Hypothetical Upcoming Trip)

Question: If you were to take a leisure trip in the NEXT SIX (6) MONTHS, what type of lodging would you most likely use?

PLEASE RANK UP TO THREE

STARTING WITH THE ONE YOU

WOULD BE MOST LIKELY TO USE

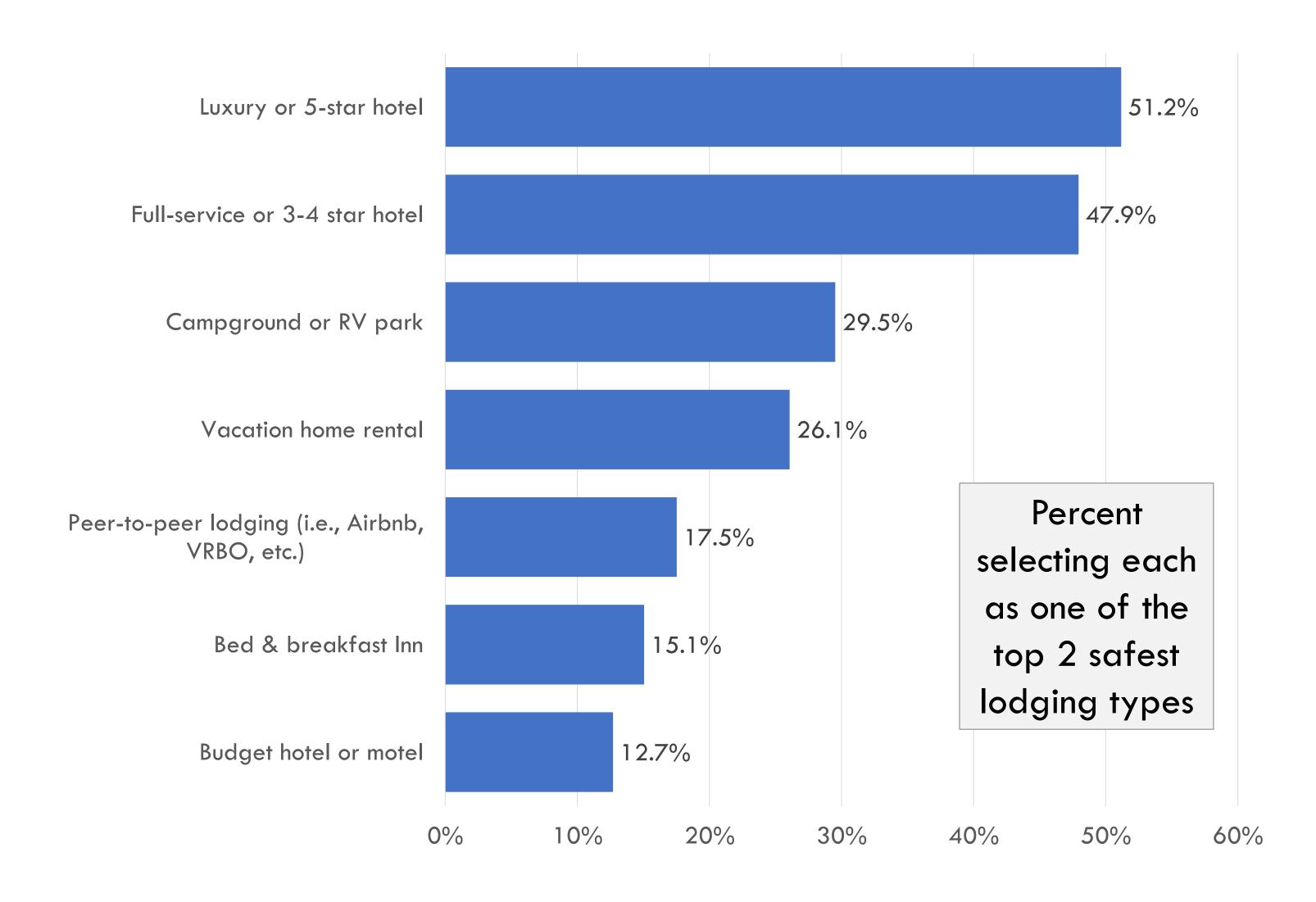




Safest Lodging Types

Question: Which would you consider to be the SAFEST LODGING OPTIONS for travel during the NEXT SIX (6)

MONTHS? (Select your TOP TWO)



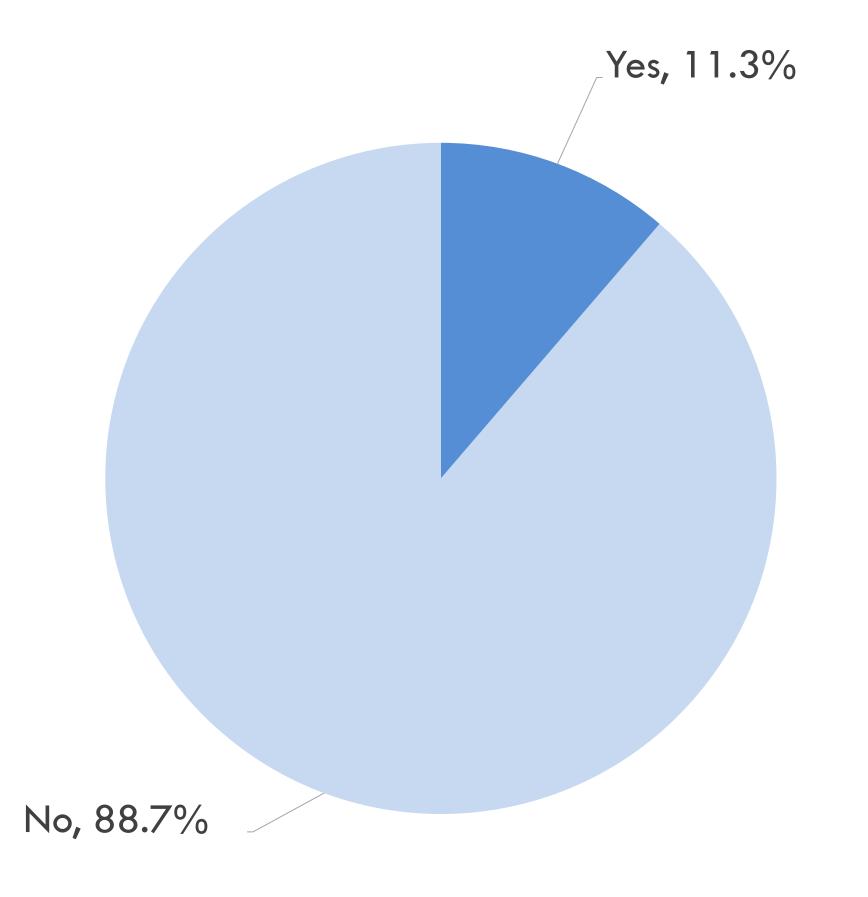


Travel by Air (Past 2 Months)

Question: In the PAST TWO (2)

MONTHS, have you traveled on a

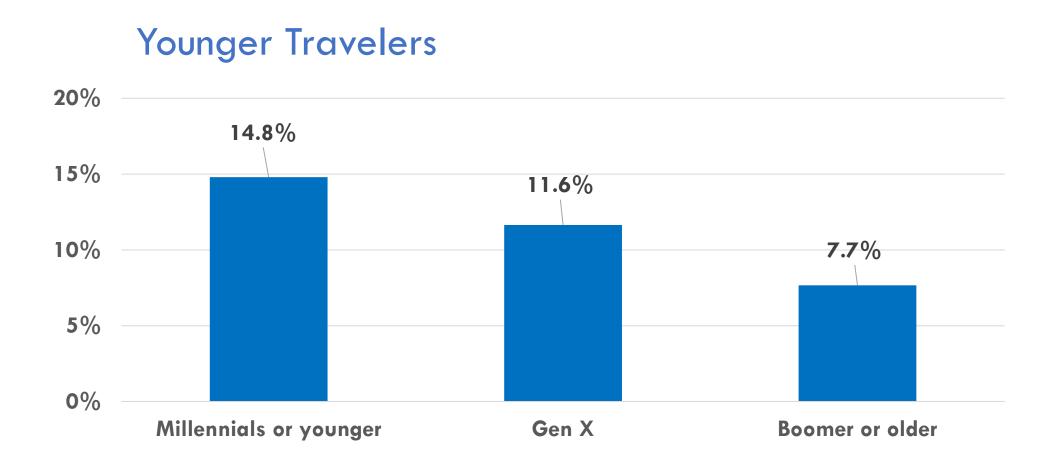
commercial airline?



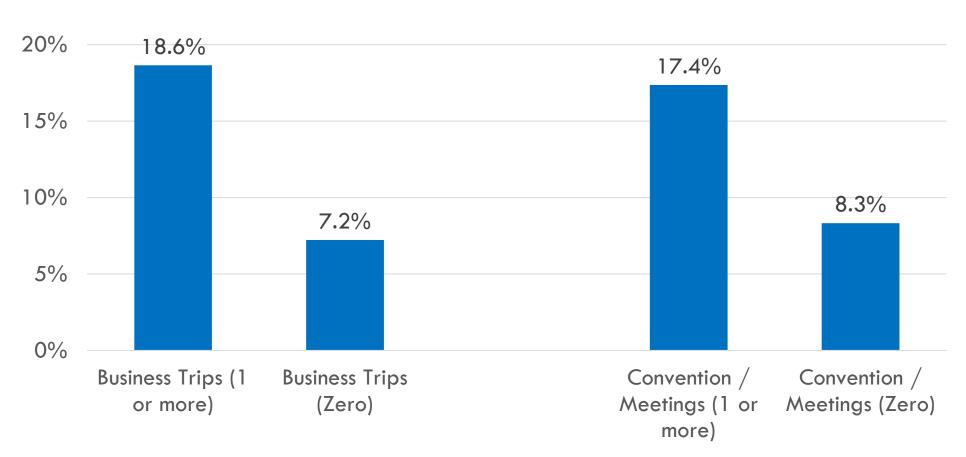


Who are More Likely to Have Traveled by Air (Past 2 Months)

Question: In the PAST TWO (2) MONTHS, have you traveled on a commercial airline?

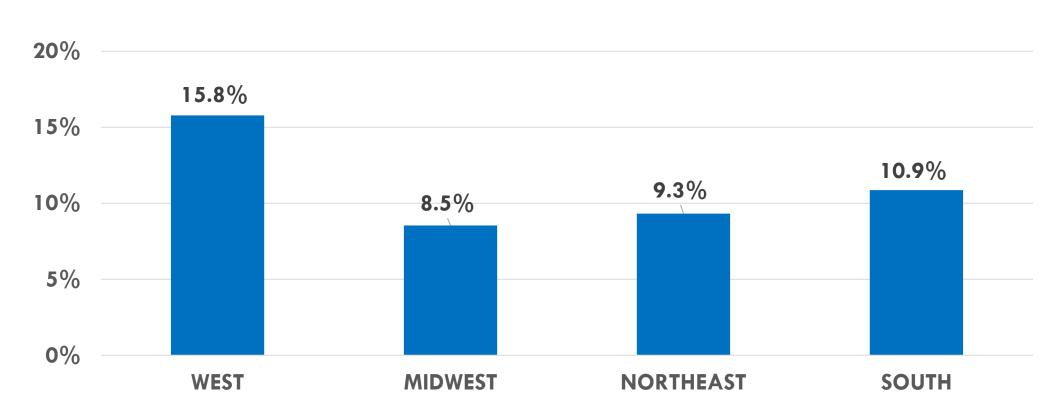


Business and Meetings Travelers*

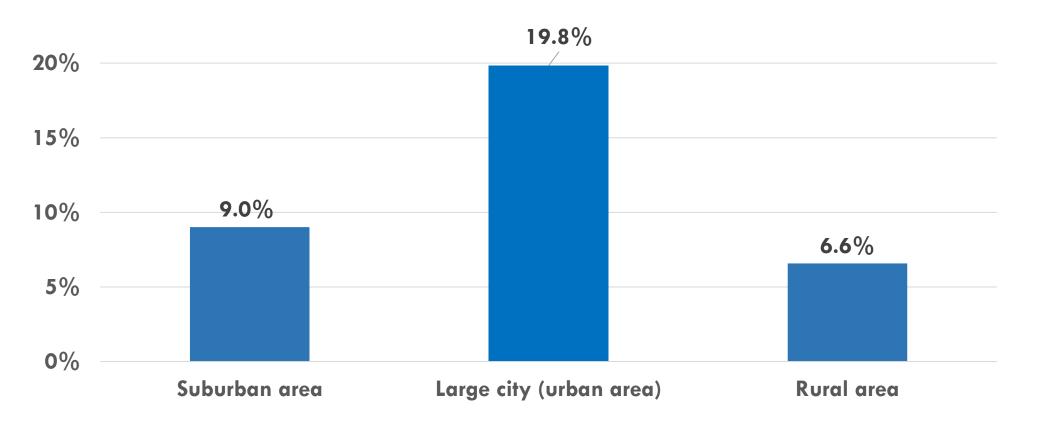


*Took at least one business (conference/convention/meeting trip in past 2 years

Residents of the Western States



Urbanites



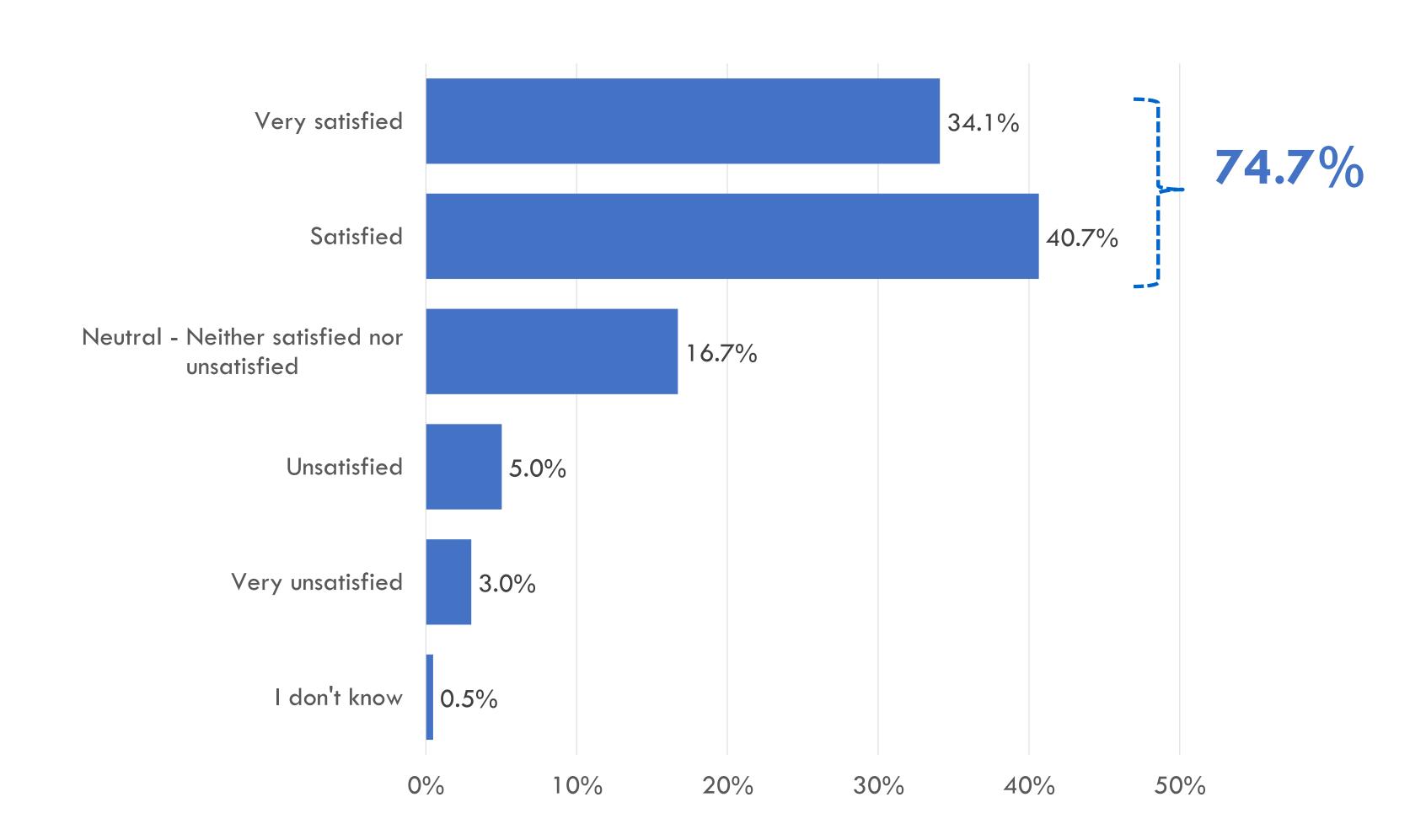


Satisfaction with Airline Performance

Question: Please think about YOUR MOST RECENT FLIGHT.

Overall, how satisfied are you with THE CORONAVIRUS SAFETY PROTOCOLS put in place by the airline(s) to protect your health during your travels?

(Base: Wave 20 data. Respondents traveling by air in the past 2 months, 133 completed surveys. Data collected July 24-26, 2020)



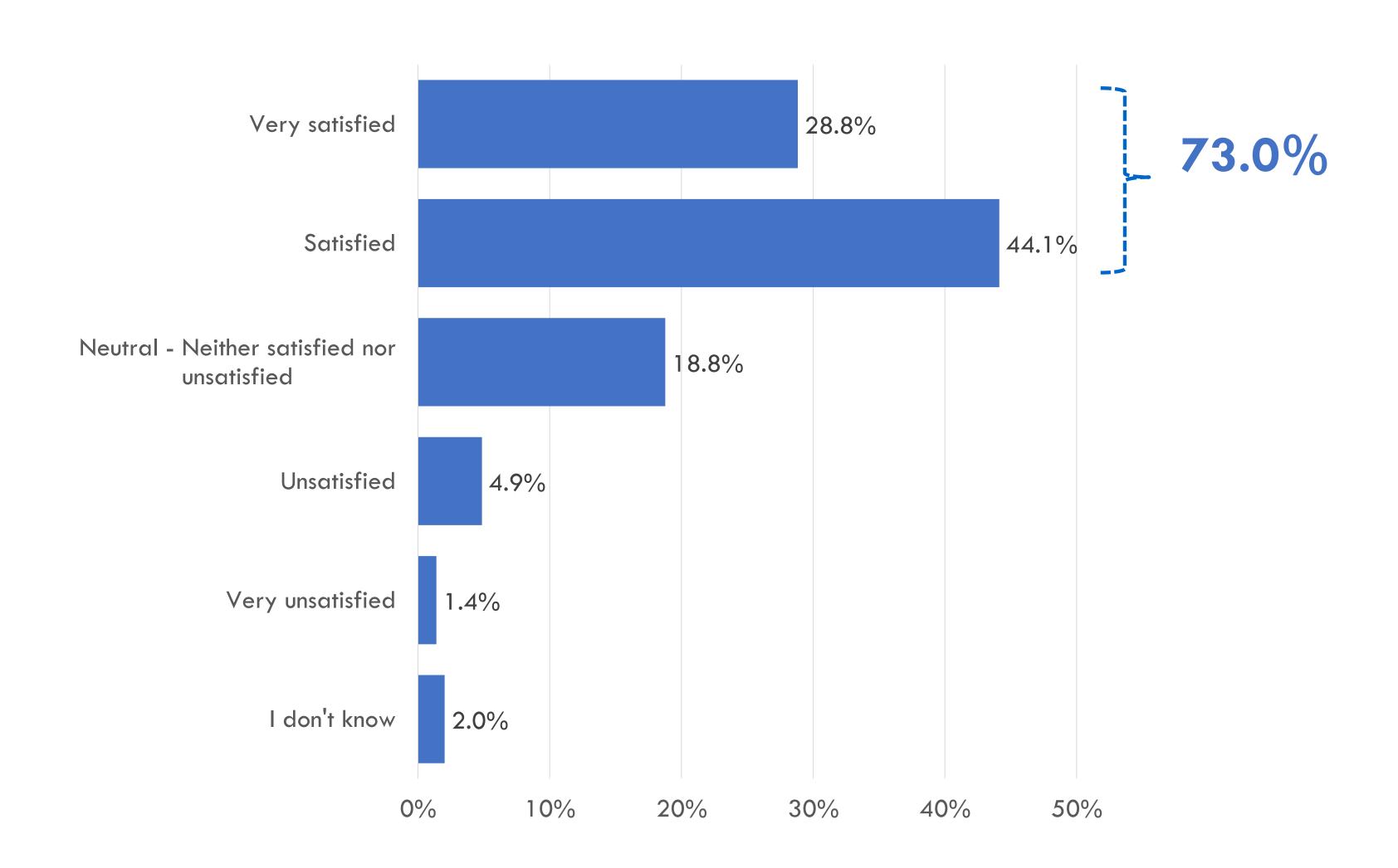


Satisfaction with Airport Performance

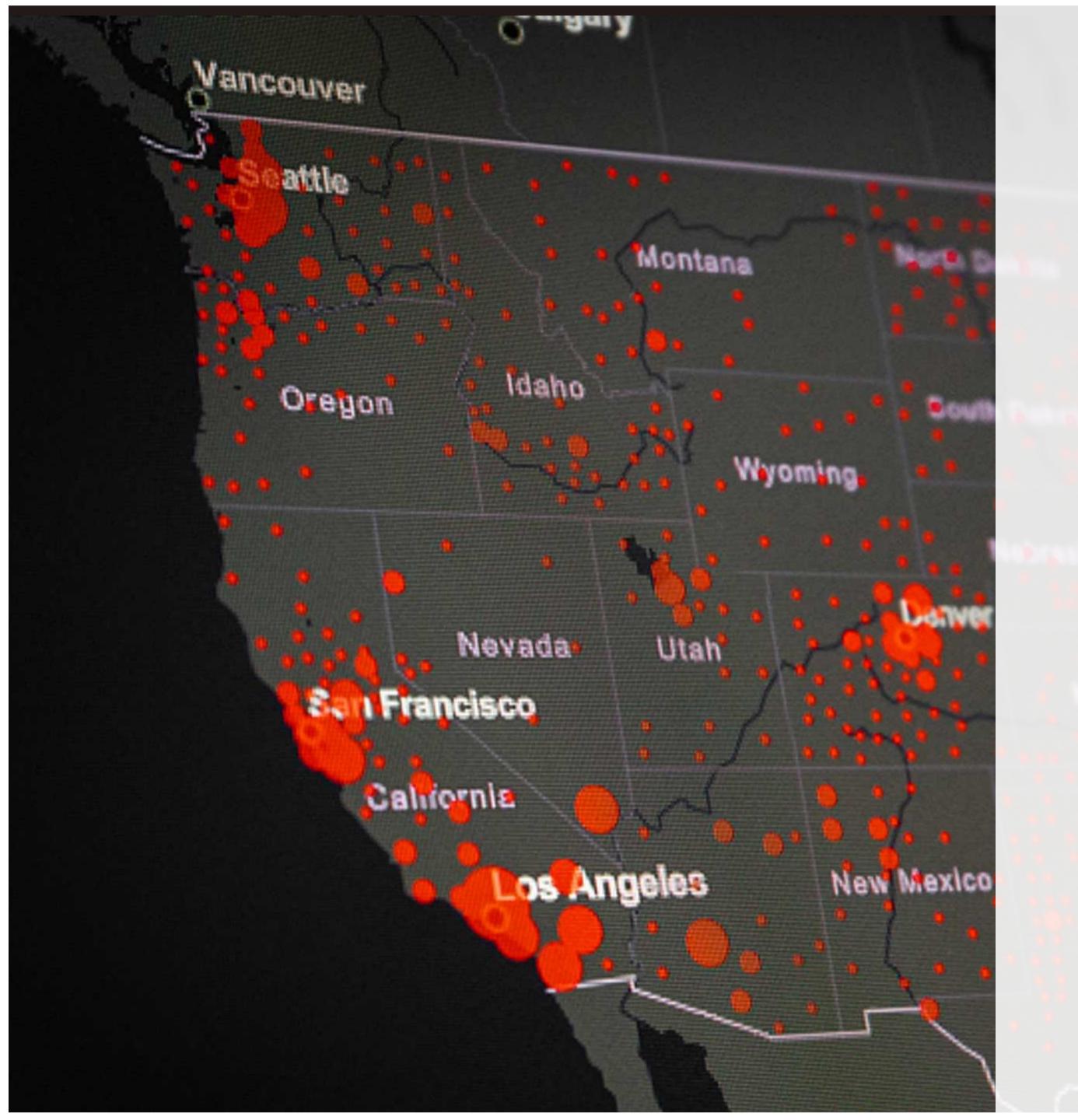
Question: Please think specifically about the AIRPORT(S) you used on this most recent air trip.

Overall, how satisfied are you with THE SAFETY PROTOCOLS IN PLACE AT THE AIRPORTS you used during your TRIP? (Select one)

(Base: Wave 20 data. Respondents traveling by air in the past 2 months, 133 completed surveys. Data collected July 24-26, 2020)







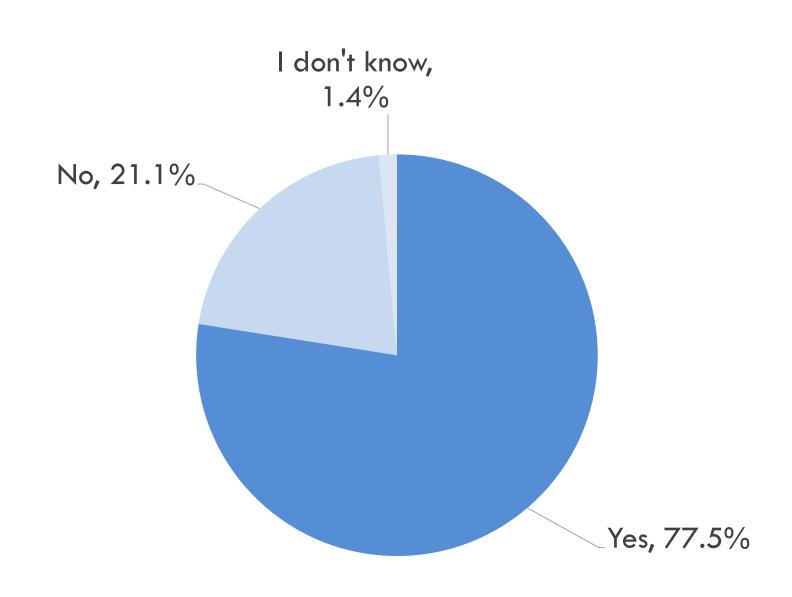
Section II:

The Pandemic's

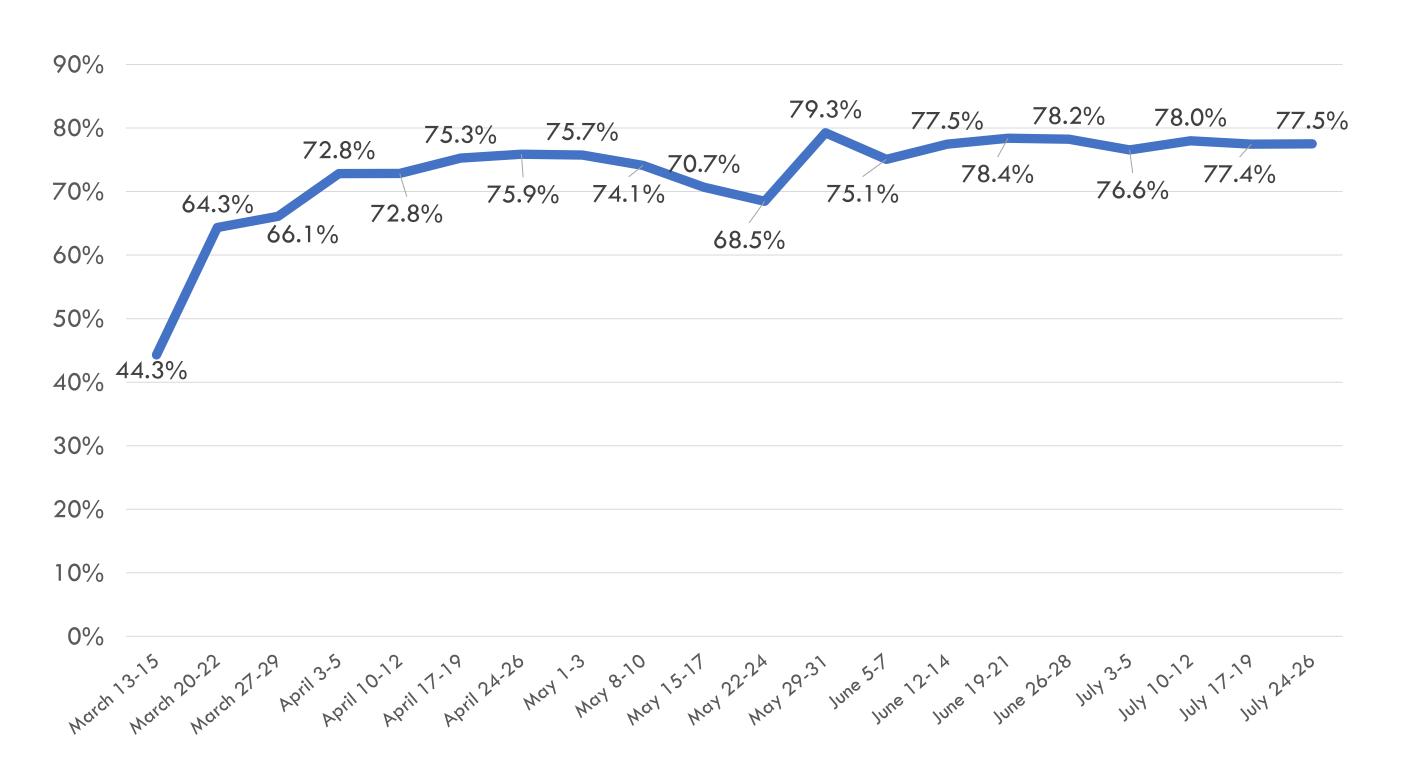
Impact on Travel

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.)



Historical data



(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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

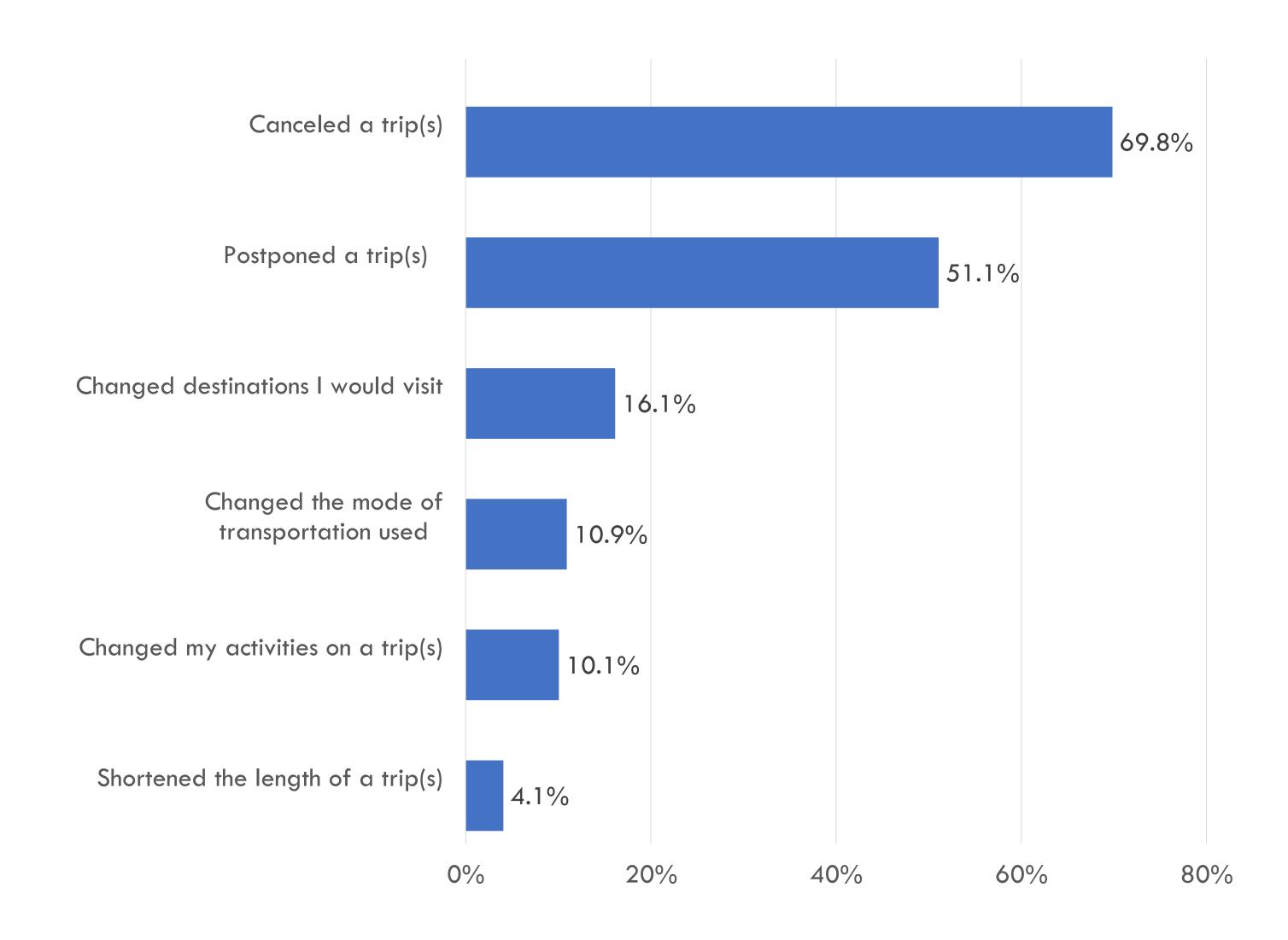


How the Coronavirus has Impacted Travel

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

Due to the coronavirus situation, I have

(Base: All respondents with travel impacted by the pandemic, 553, 770, 795, 890, 937, 929, 903, 926, 903, 871, 843, 993, 923, 952, 957, 974, 1,050, 954, 941 and 960 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14,19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

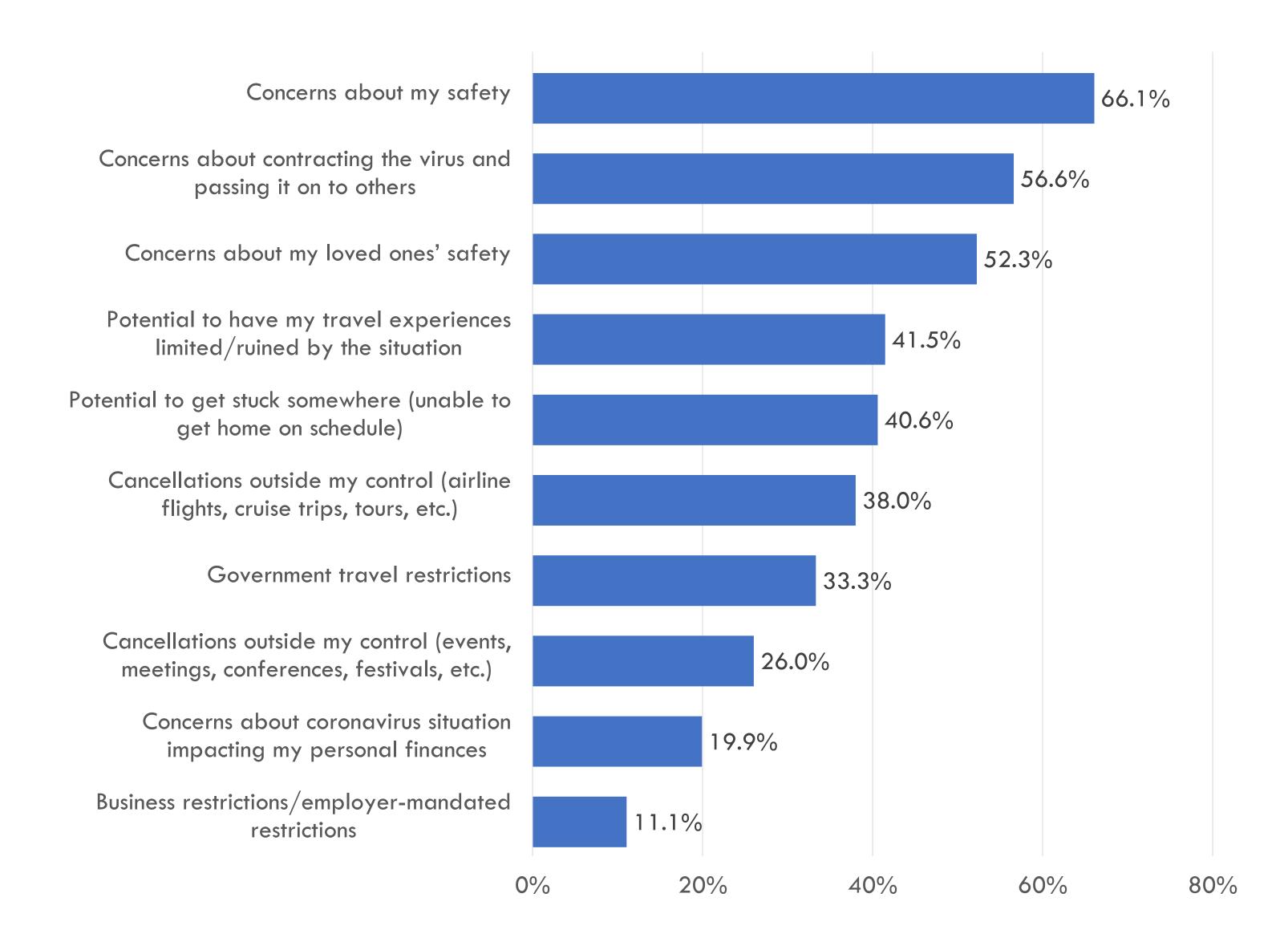




Why the Coronavirus is Impacting Travel

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

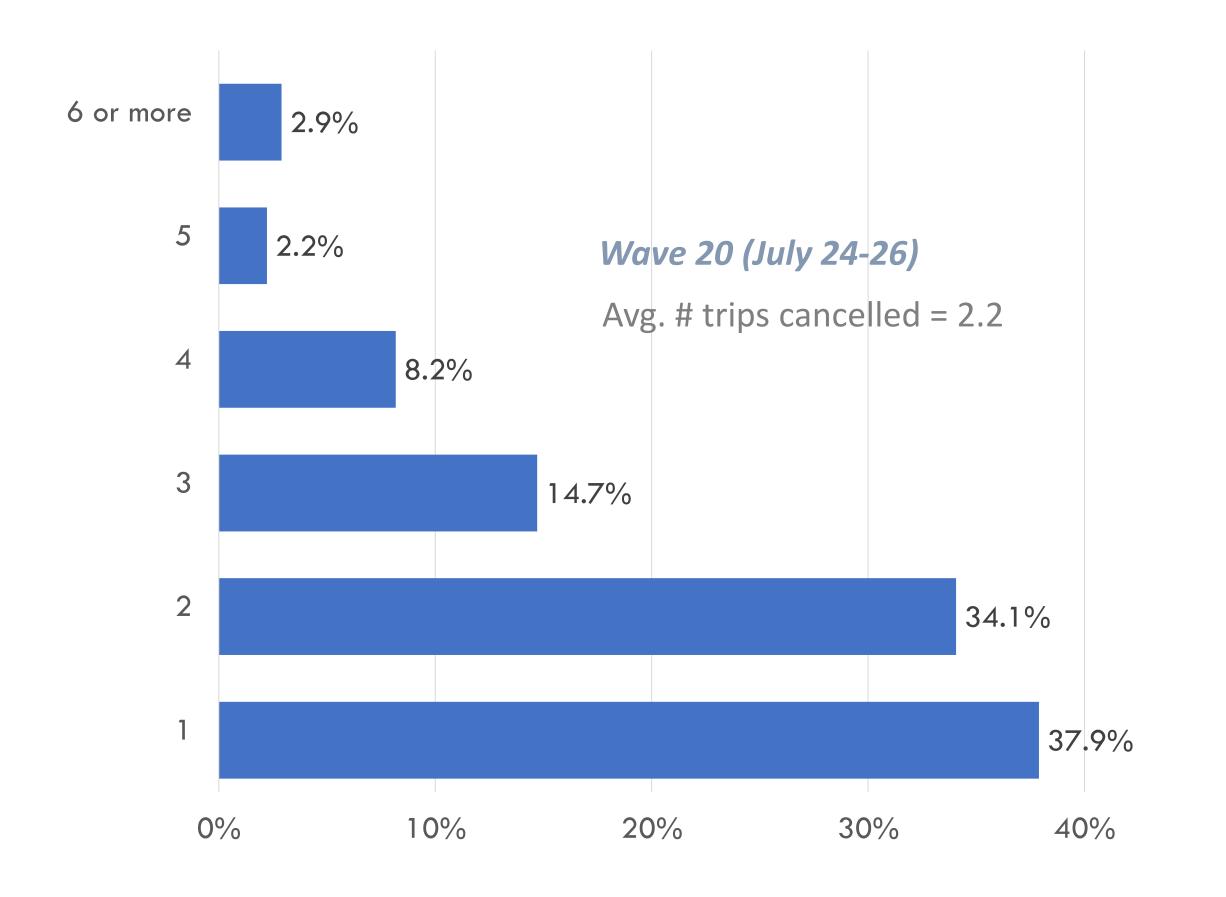
(Base: Wave 20. Respondents whose travel was impacted by the coronavirus, 936 completed surveys. Data collected July 24-26, 2020)



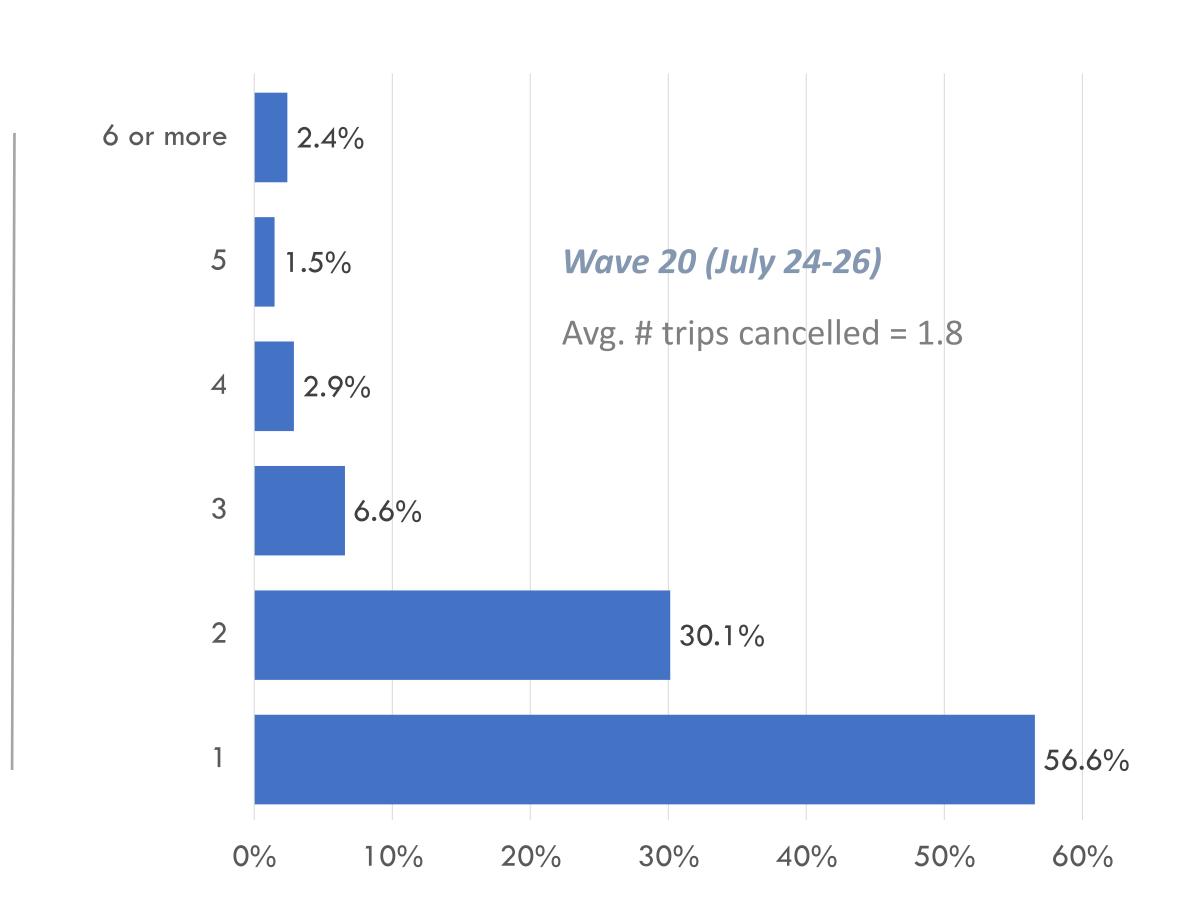


Trips Cancelled/Postponed

Question: How many trips did you cancel?



Question: How many trips did you postpone?



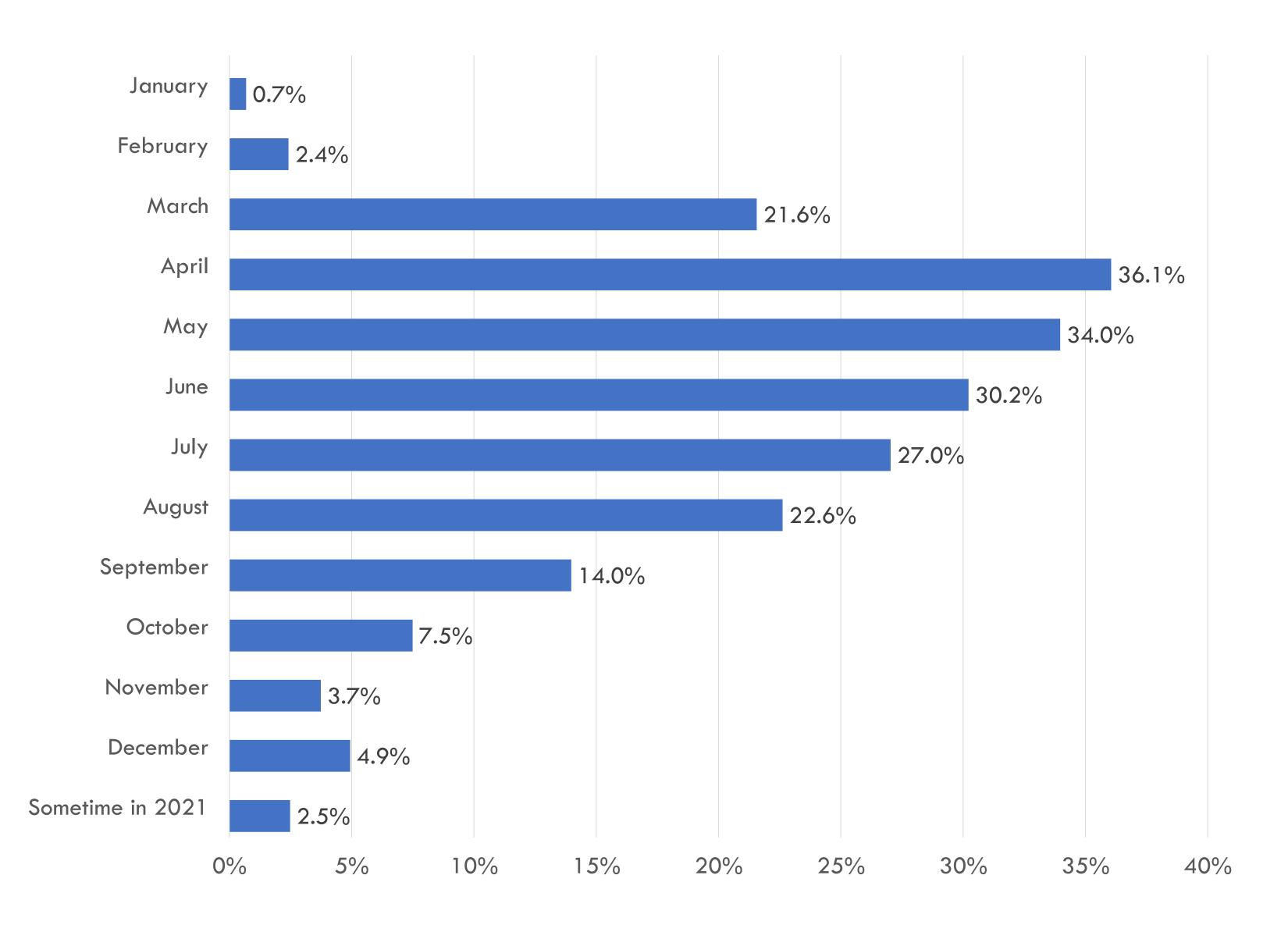
(Base: Wave 20 Respondents cancelling/postponing a trip, 672/501 completed surveys. Data collected July 24-26, 2020)



Month of Trip Cancellation

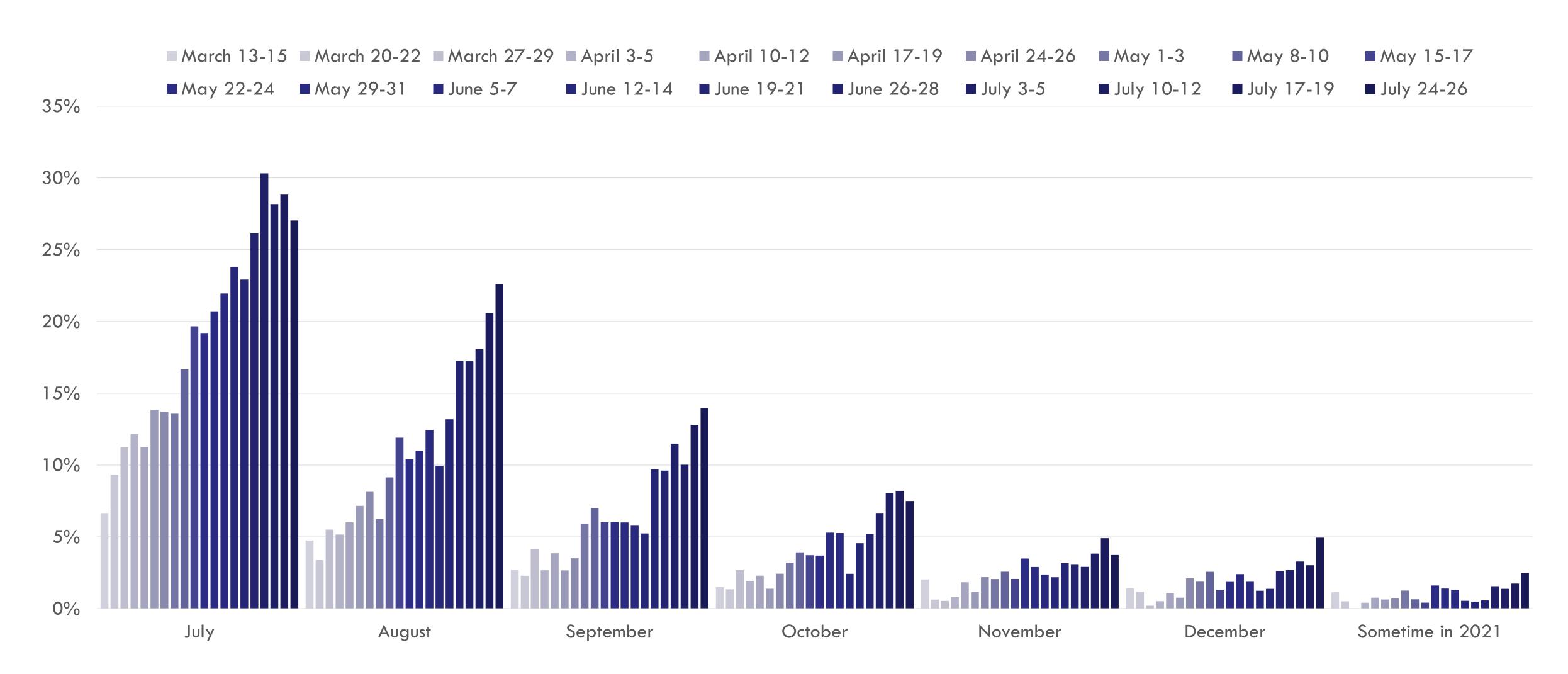
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(Base: Wave 20 data. Respondents cancelling a trip, 672 completed surveys. Data collected July 24-26, 2020)





Month of Trip Cancellation

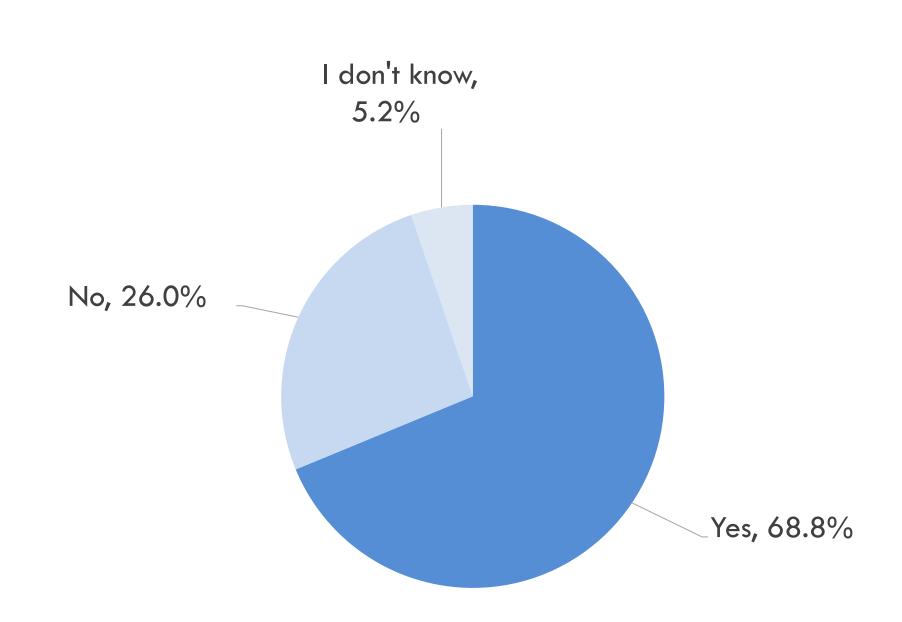


(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665, 728, 675, and 672 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

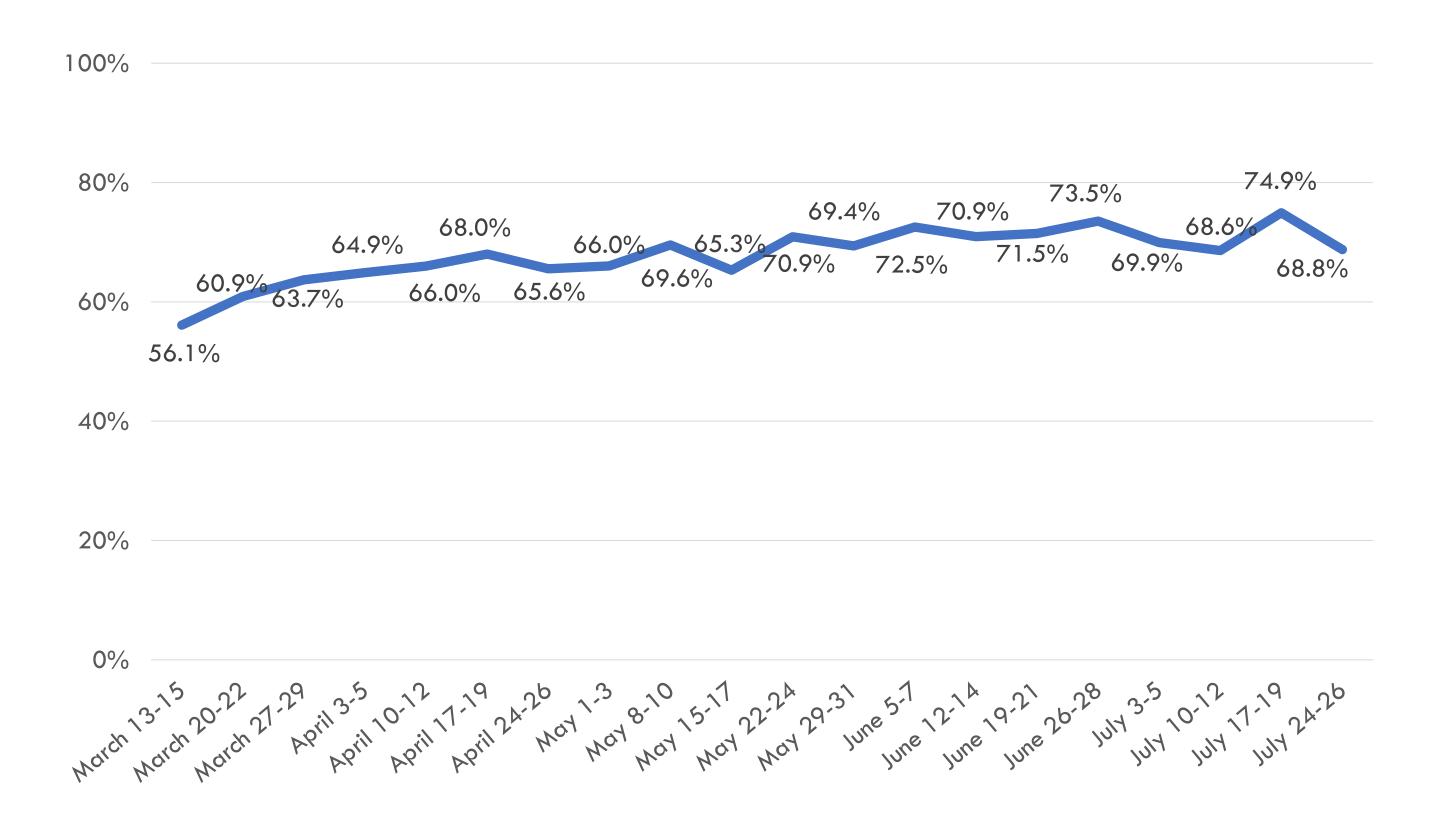


Did Traveler Get Full Refunds?

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



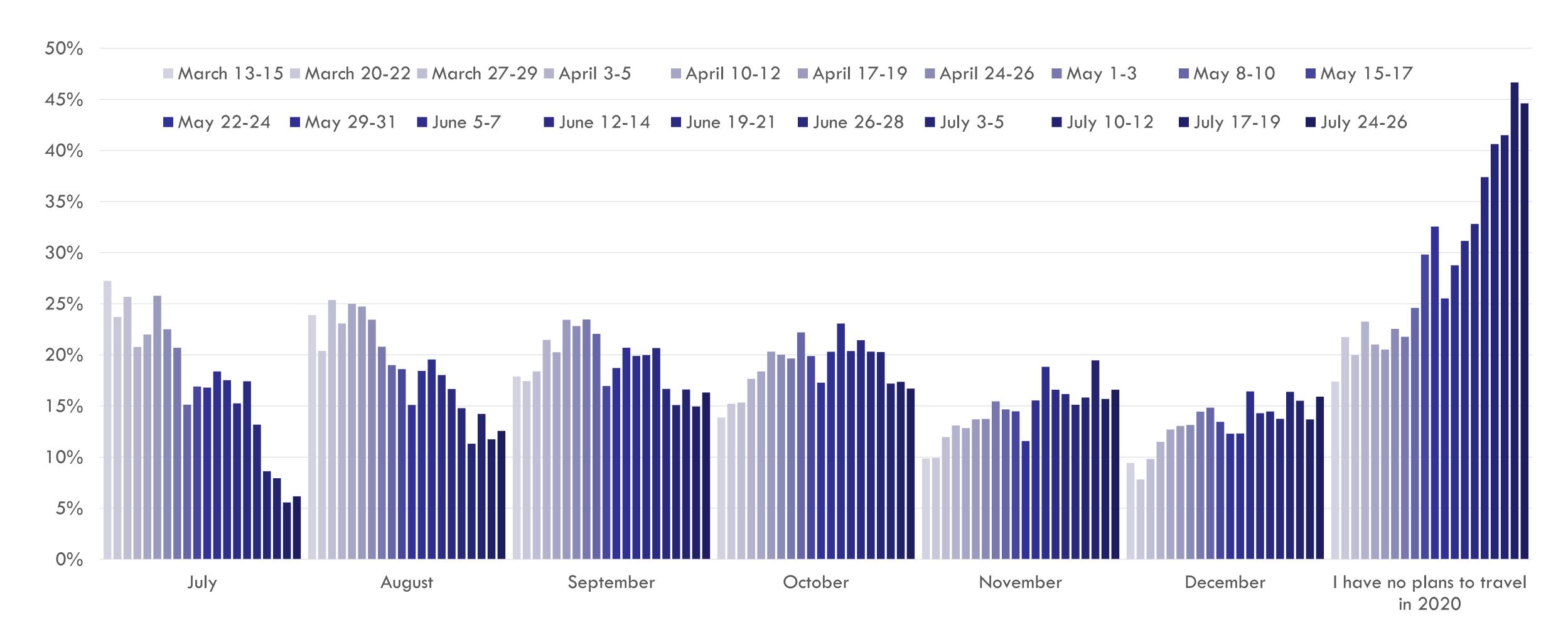
(Base: Wave 20 data. Respondents cancelling a trip, 672 completed surveys. Data collected July 24-26, 2020)





Upcoming Travel Plans

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

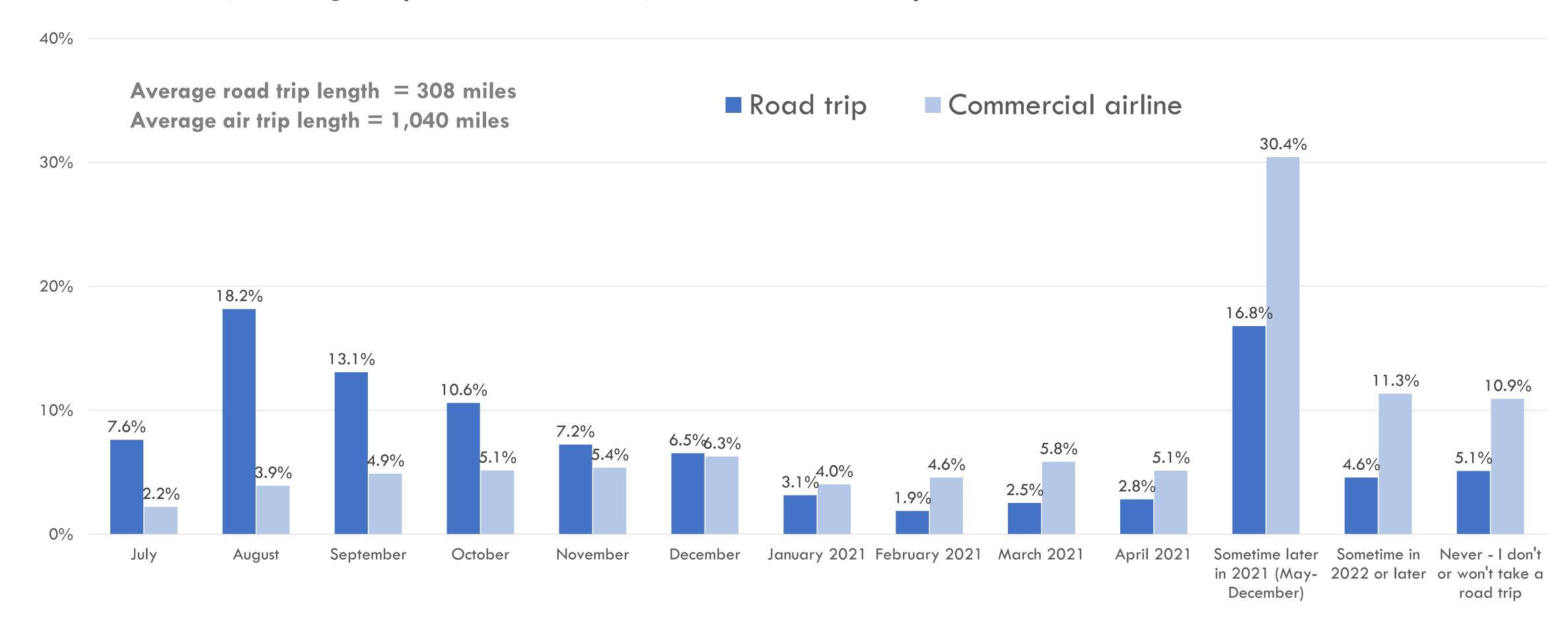




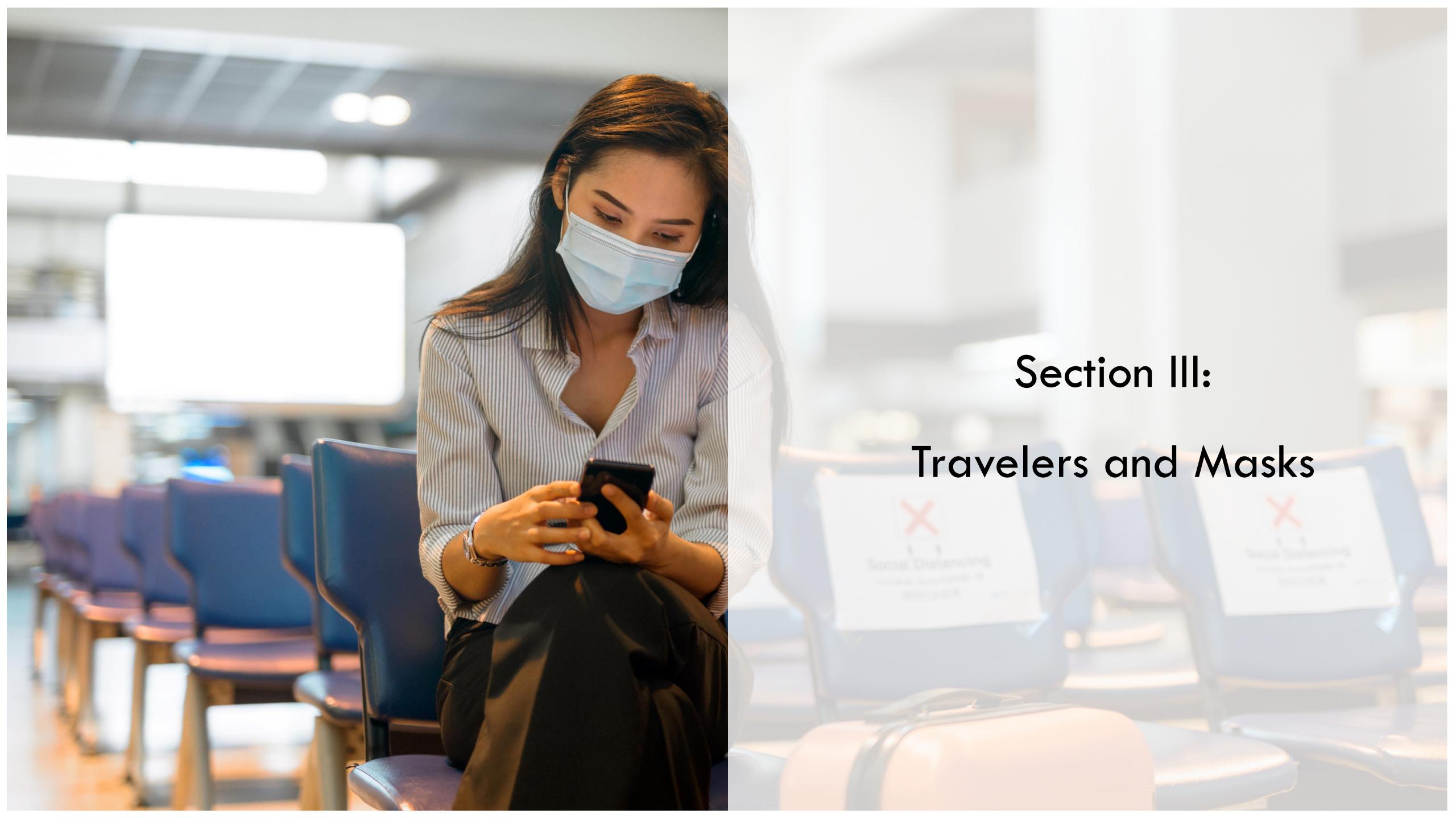
Road & Air Trips Expected

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

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



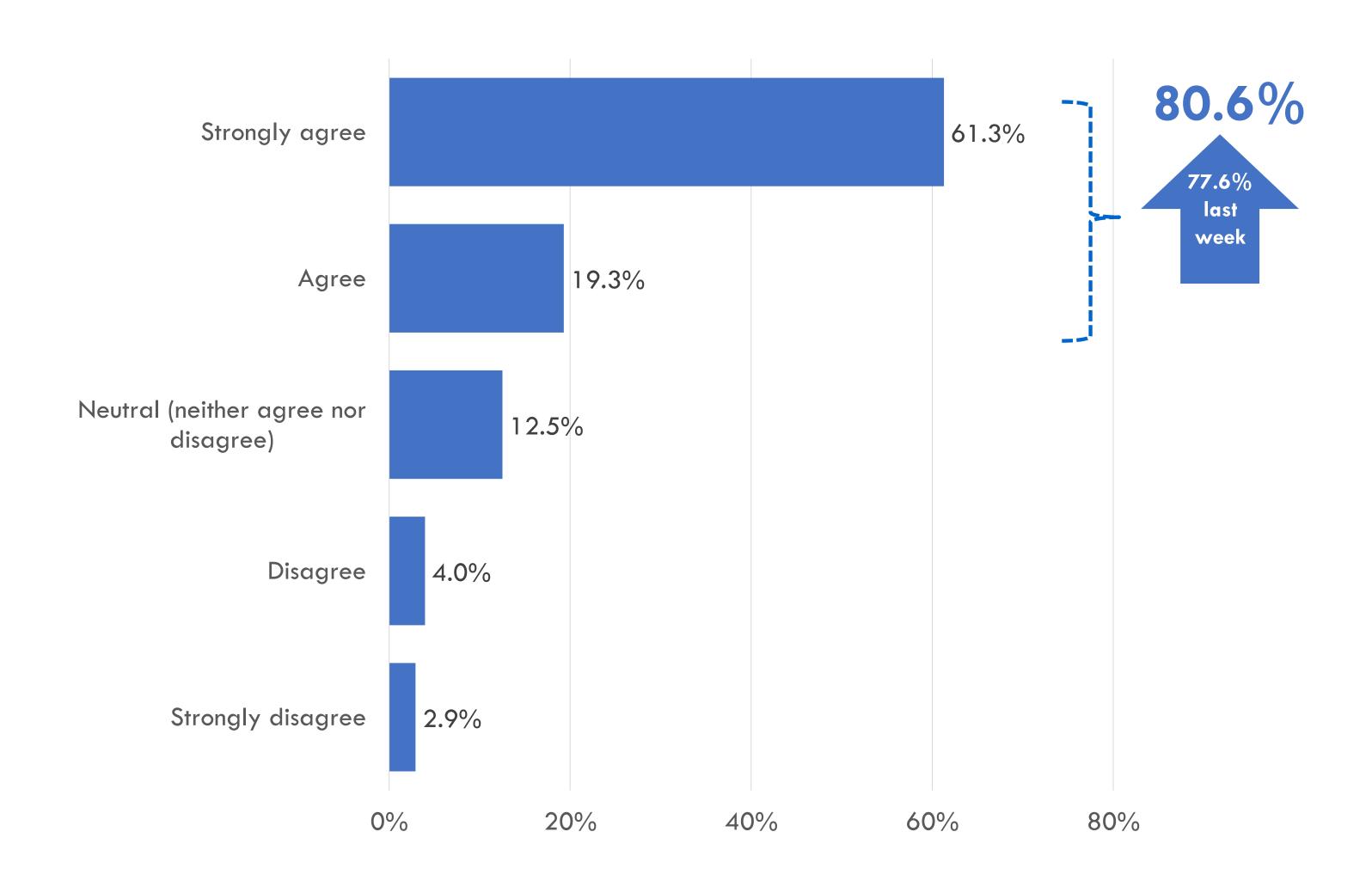




Should People Wear Face Masks in Public

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

(Agreement scale)

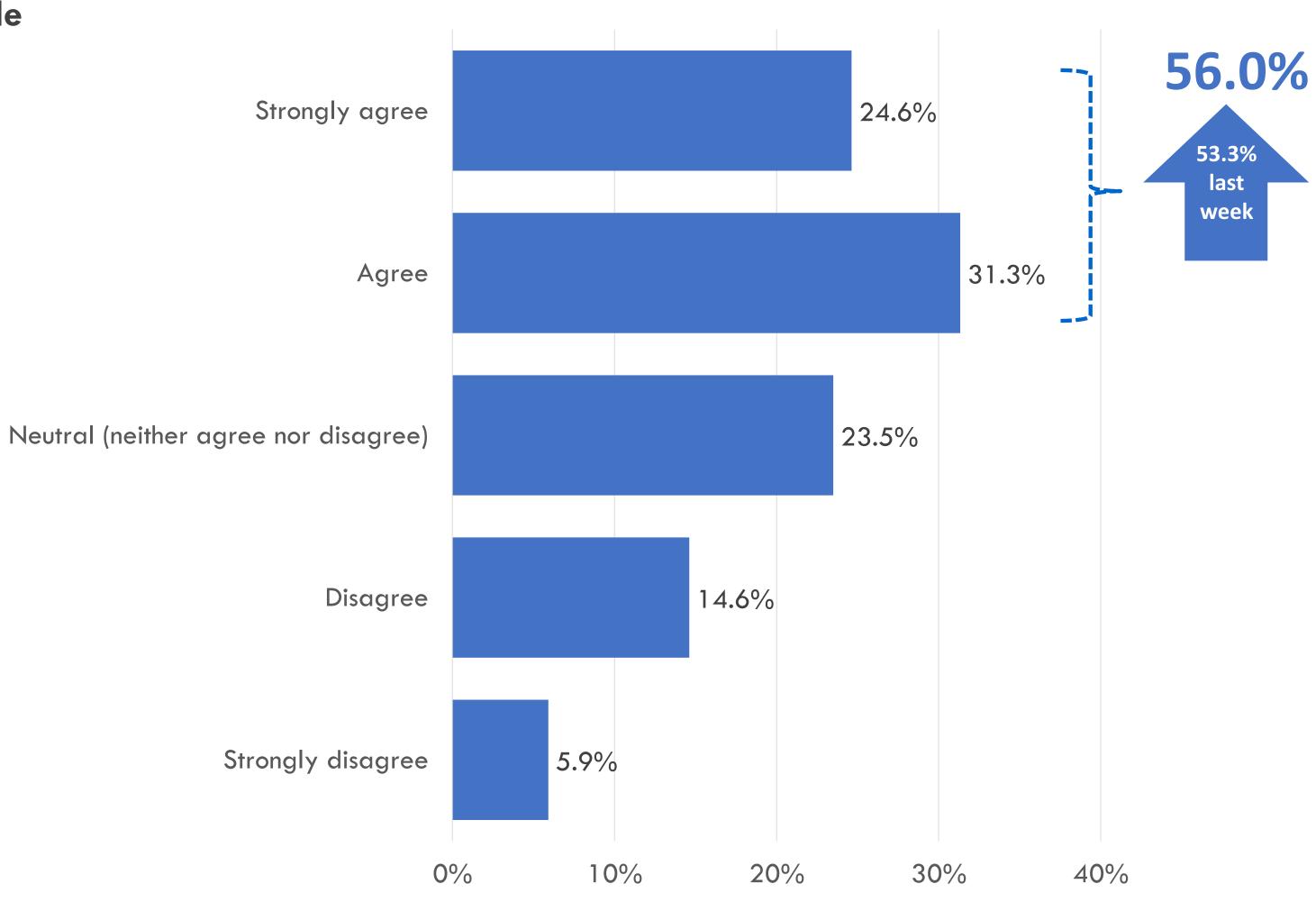




Wearing Masks in the Community

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

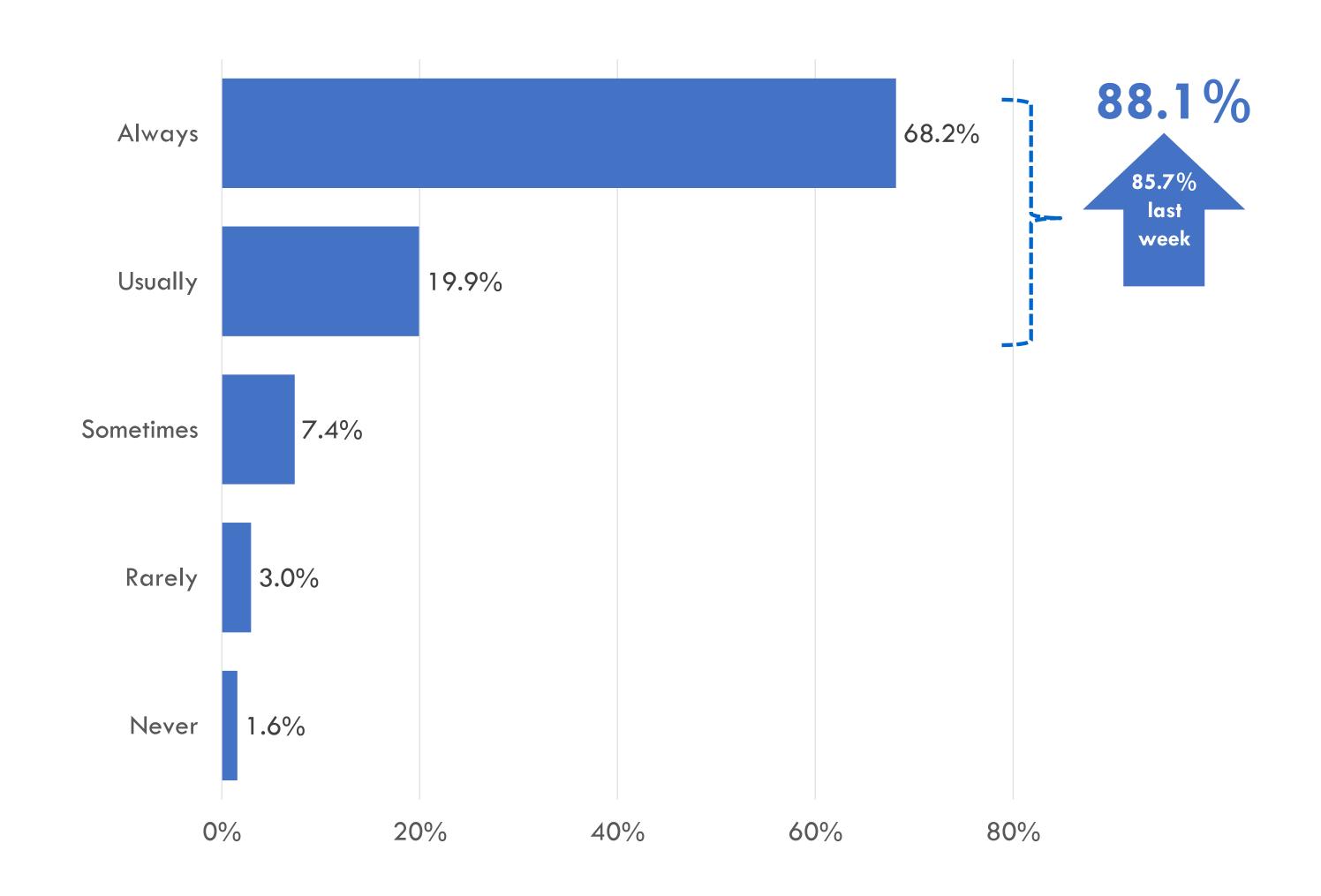
(Agreement scale)





Frequency of Mask Usage

Question: How often do you personally wear a mask when going out in public?



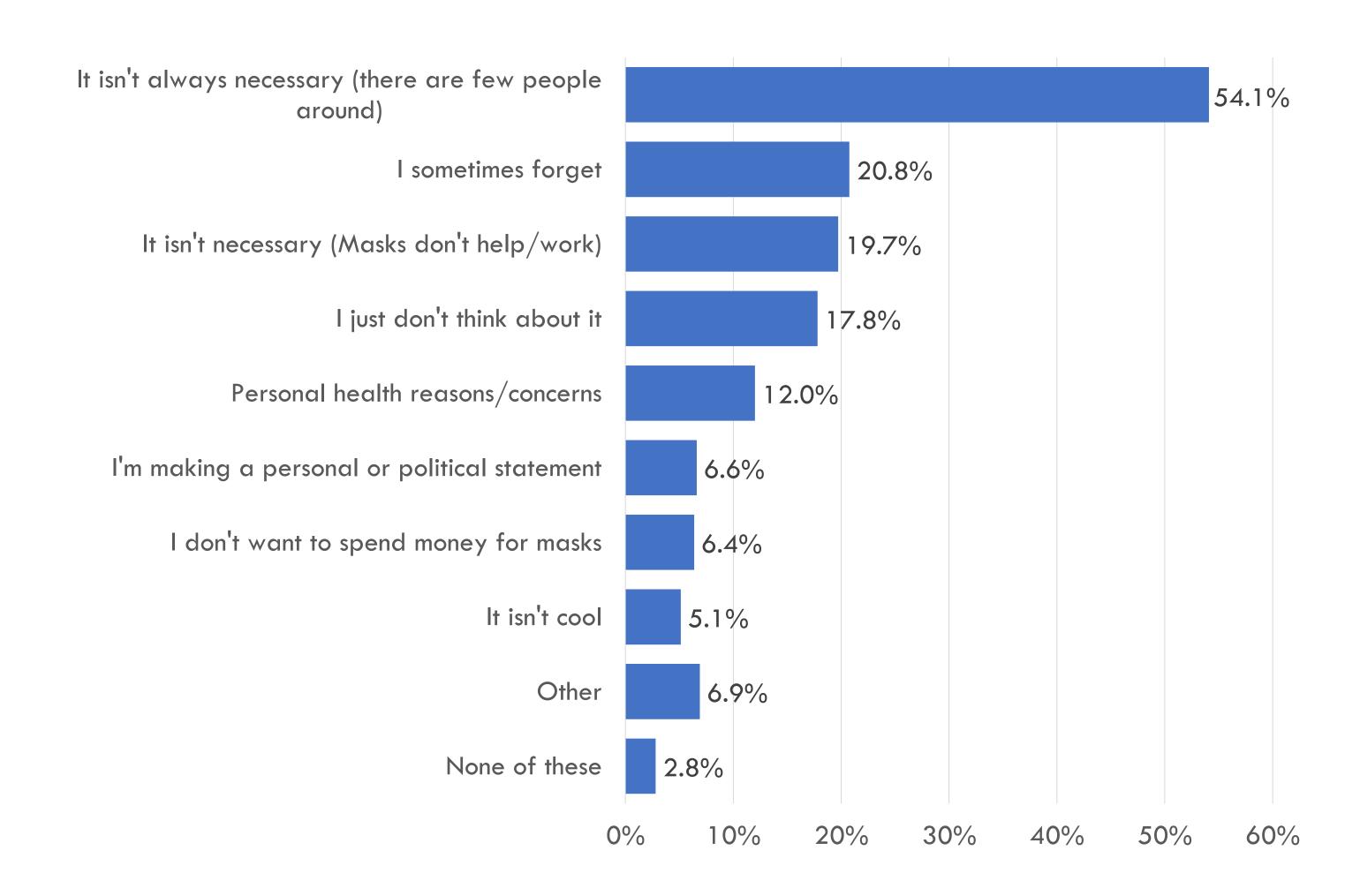


Reasons for Not Wearing Masks

Question: Which of the following are reasons you don't always wear a face mask when going out in public?

(Select all that apply)

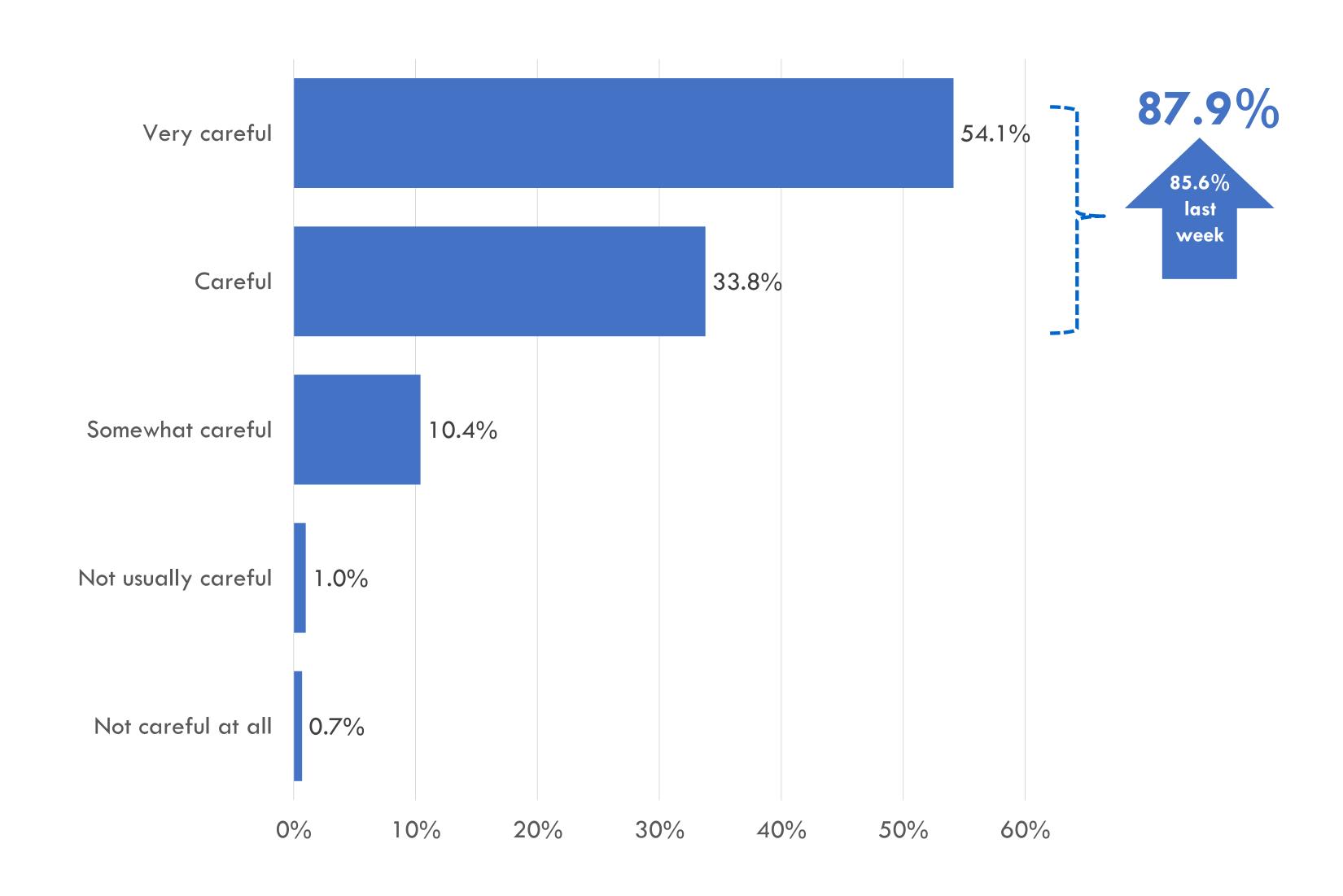
(Base: Wave 20 data. Respondents who did not say they always wear masks in public, 367 completed surveys. Data collected July 24-26, 2020)





How Careful are They About Social Distancing

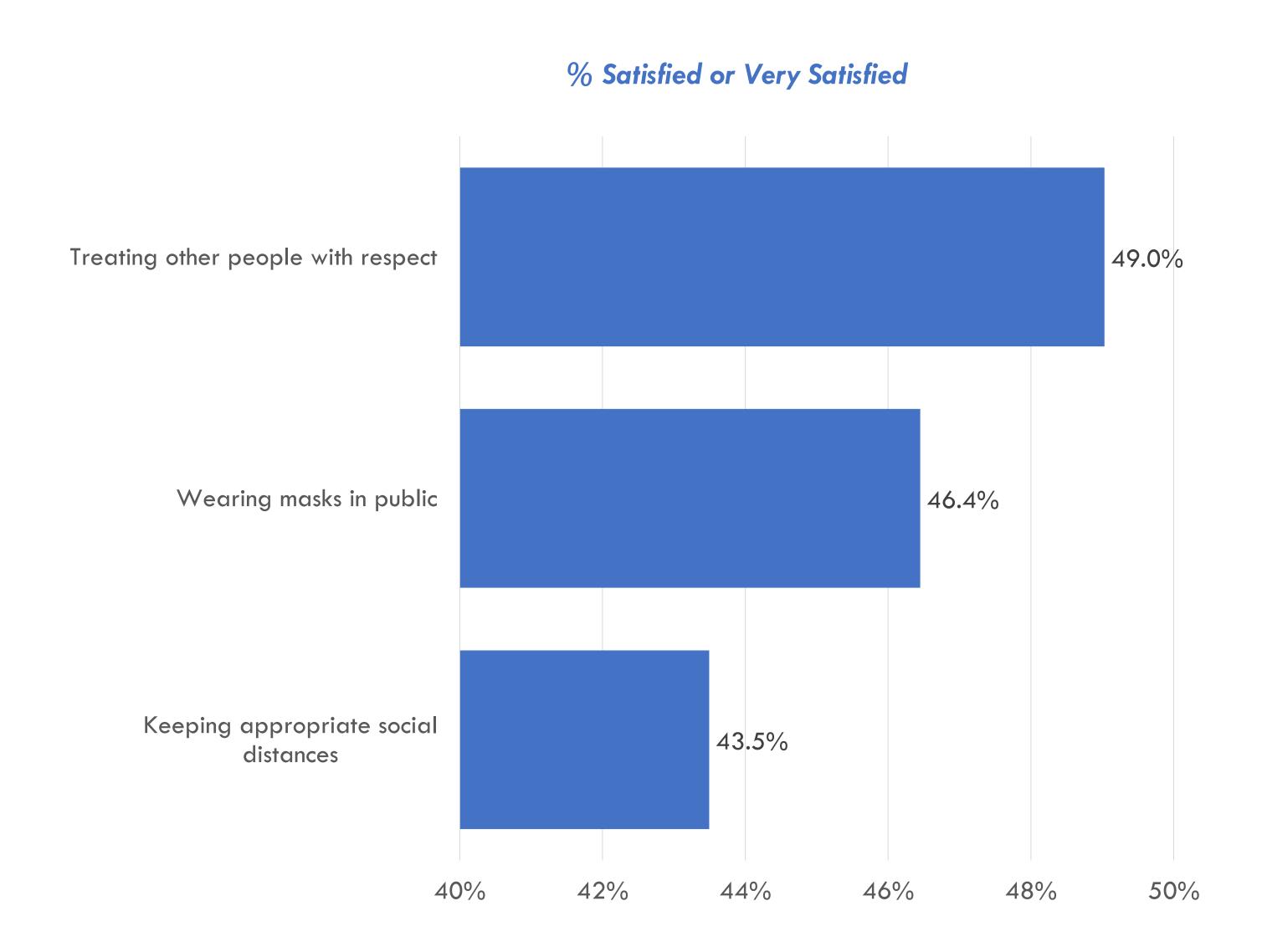
Question: When you are in public,
how careful are you generally to
keep an appropriate distance
between yourself and others? (Select
one)





Satisfaction with Pandemic Protocols

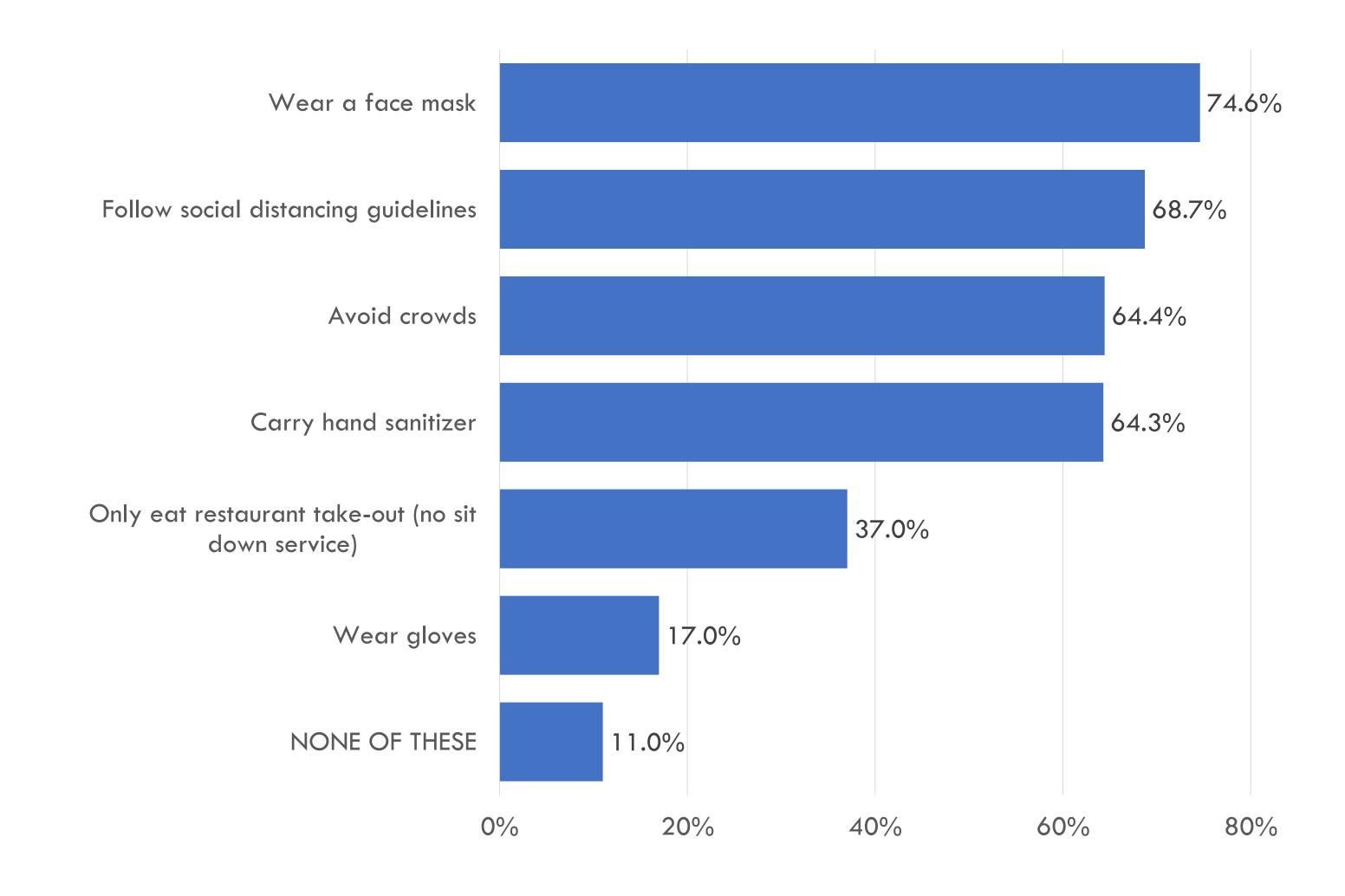
Question: How satisfied are you with the way people in your community are doing each of the following?





Pandemic-era Travel Etiquette

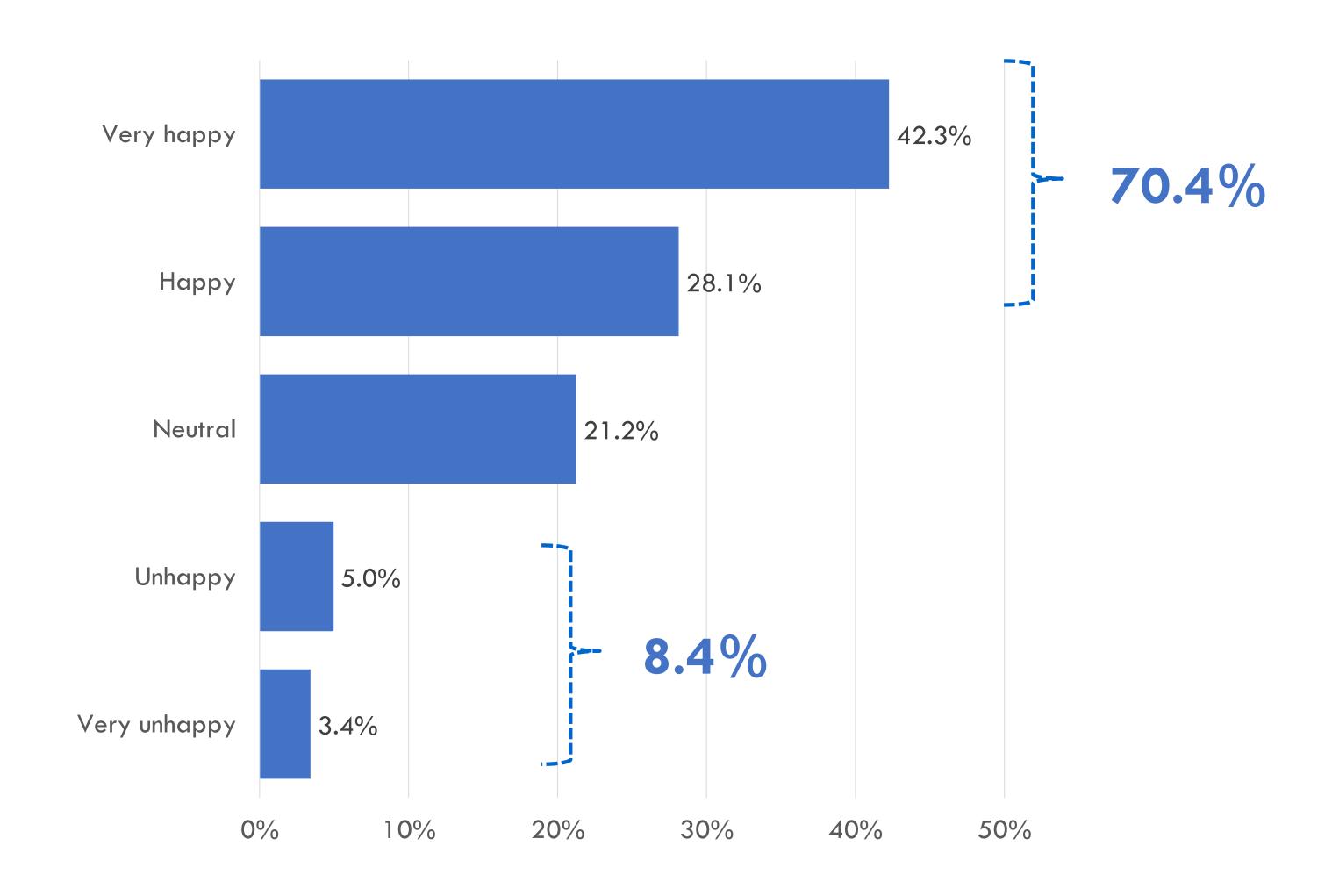
Question: If you were to take a trip in the next six months, which would you be likely to do? (Select all that apply)





Feelings About Destinations Requiring Masks

Question: Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public?

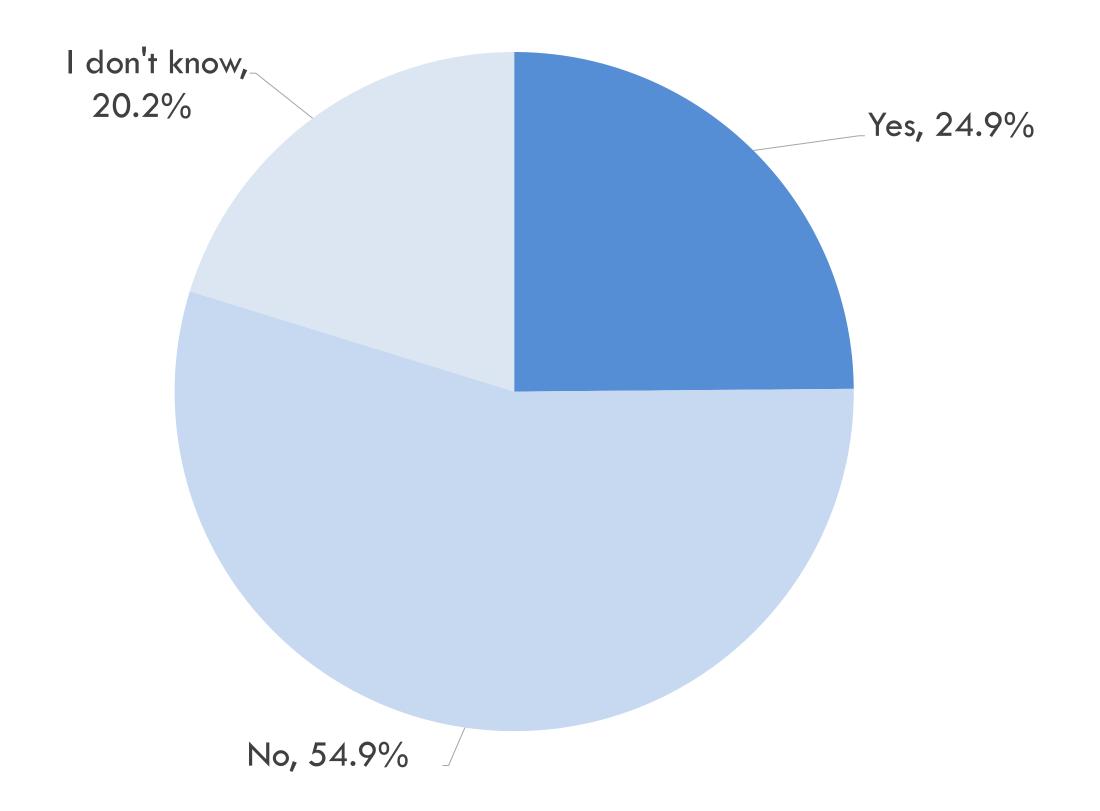




Effect of Mask-Mandate on Likelihood of Visiting a Destination

Question: Would this requirement alone be enough to keep you from visiting a place you otherwise wanted to visit?

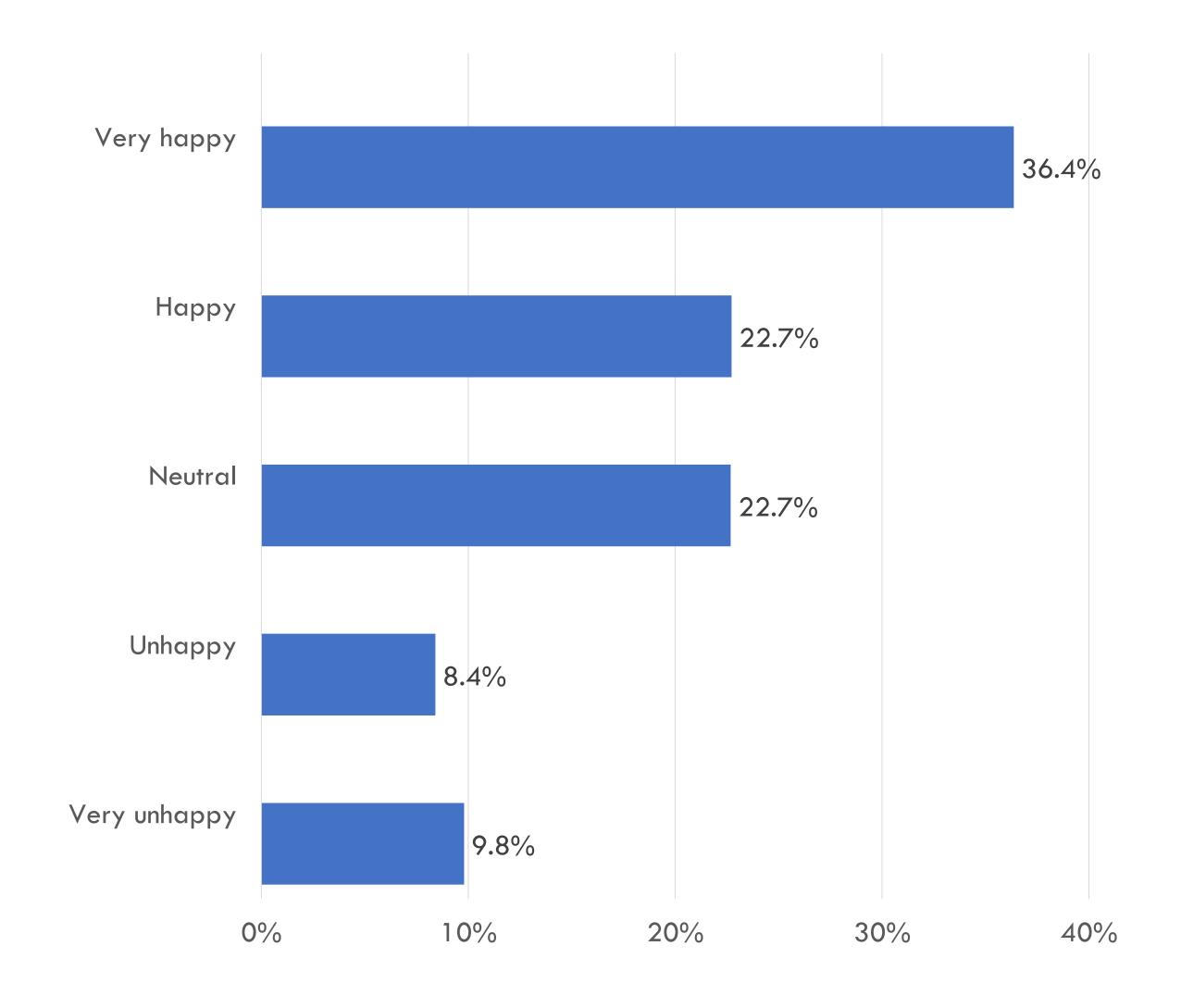
(Base: Wave 20 data. Respondents neutral, unhappy or very unhappy about destinations requiring masks. 340 completed surveys. Data collected July 24-26, 2020)



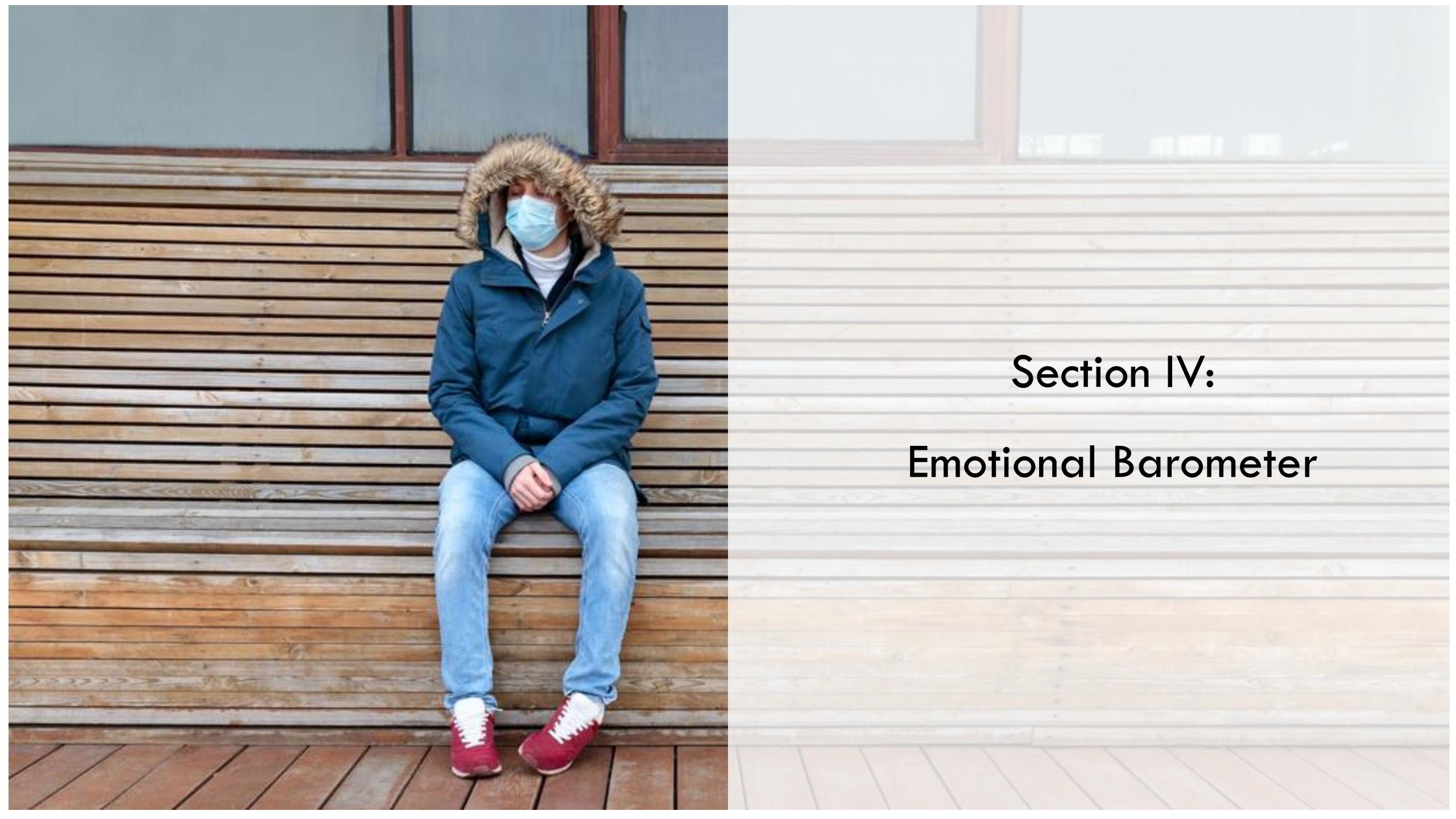


Feelings About Fines for Non-Compliance with Mask Regulations

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

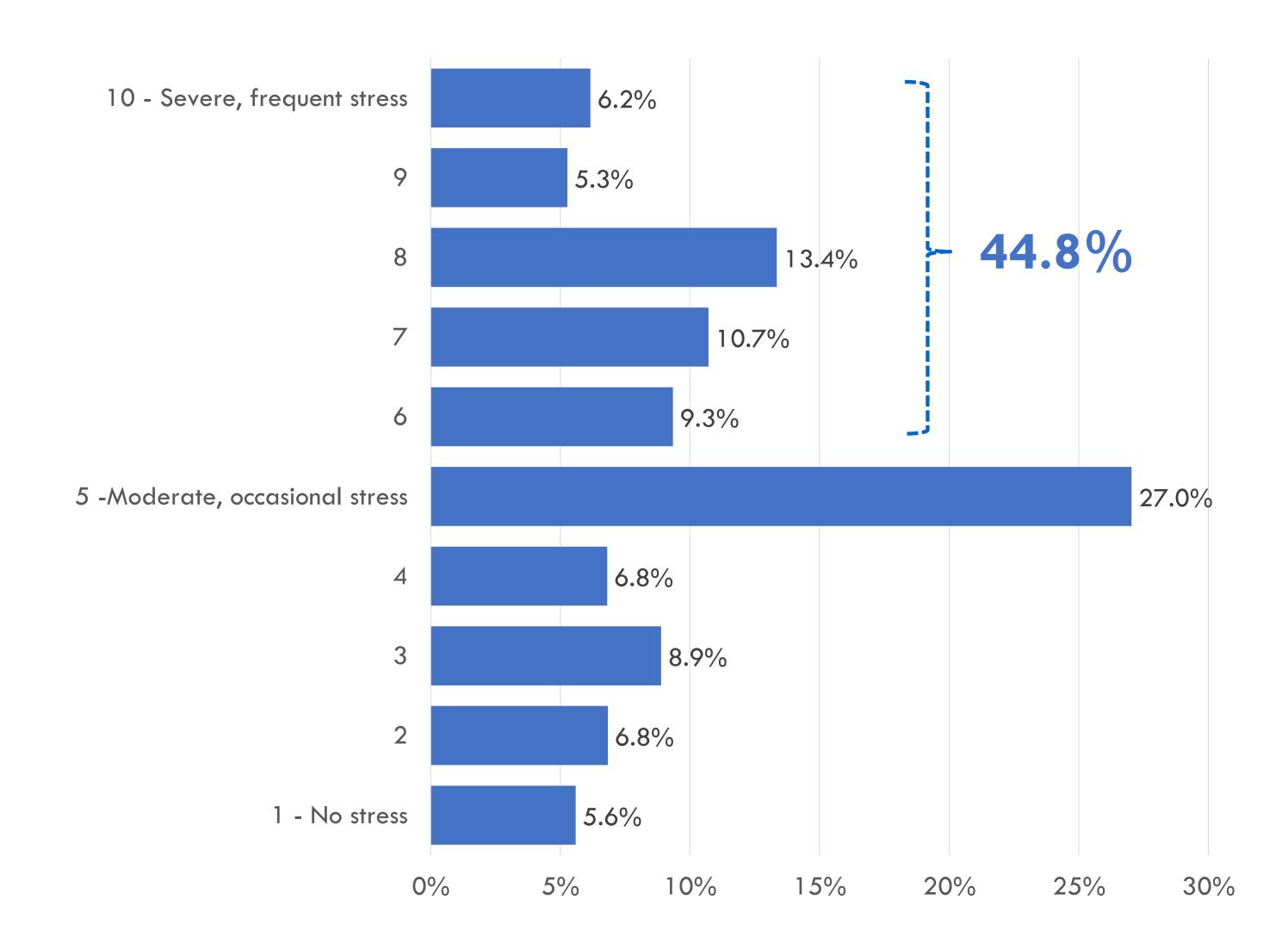






Stress in Daily Life (Past Month)

Question: Thinking about the last month, please rate your average level of daily stress from 1 - 10.

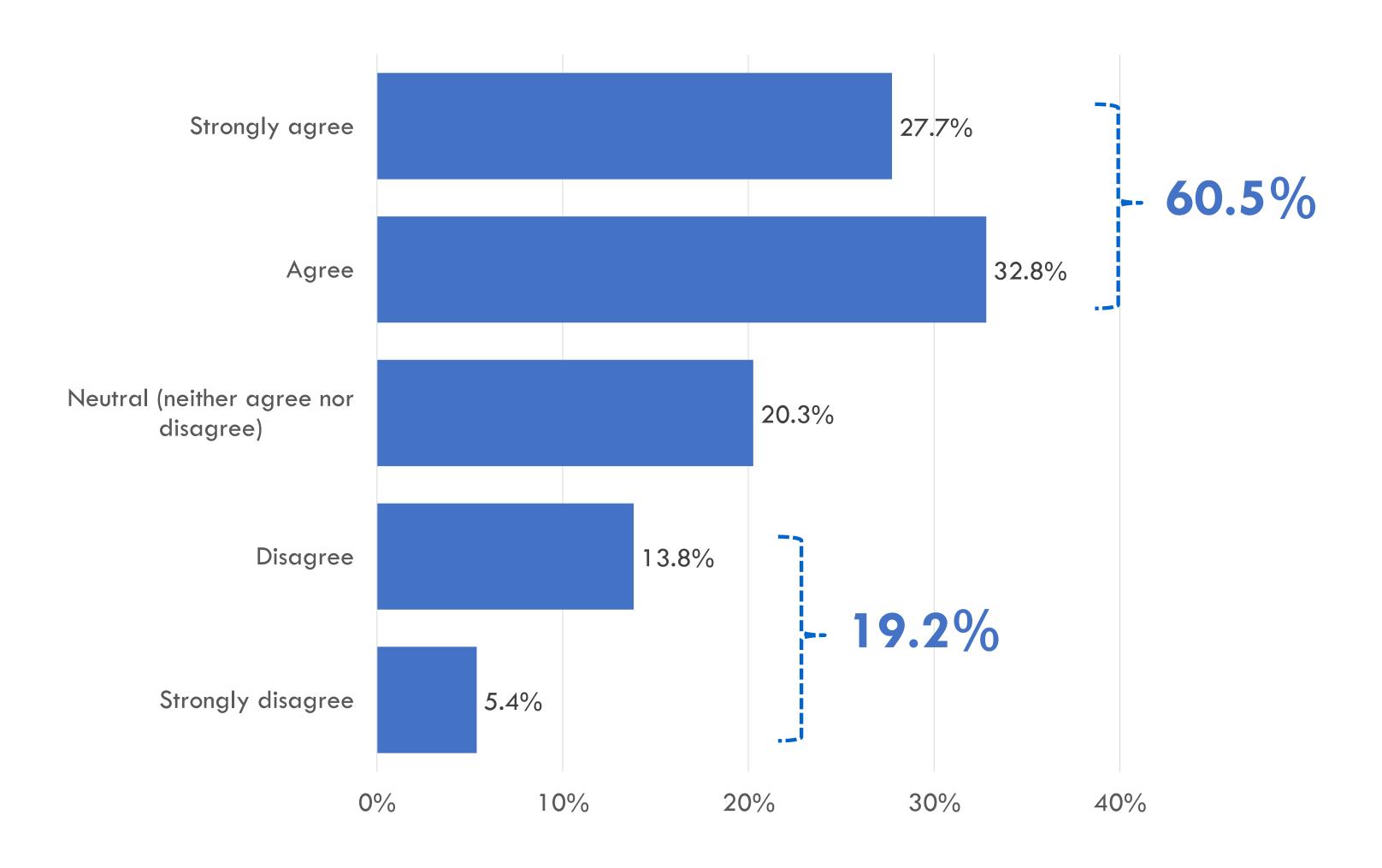




Ability to Enjoy Travel Right Now

Question: Statement agreement.

If I were to travel now for leisure, I would not be able to fully enjoy it.

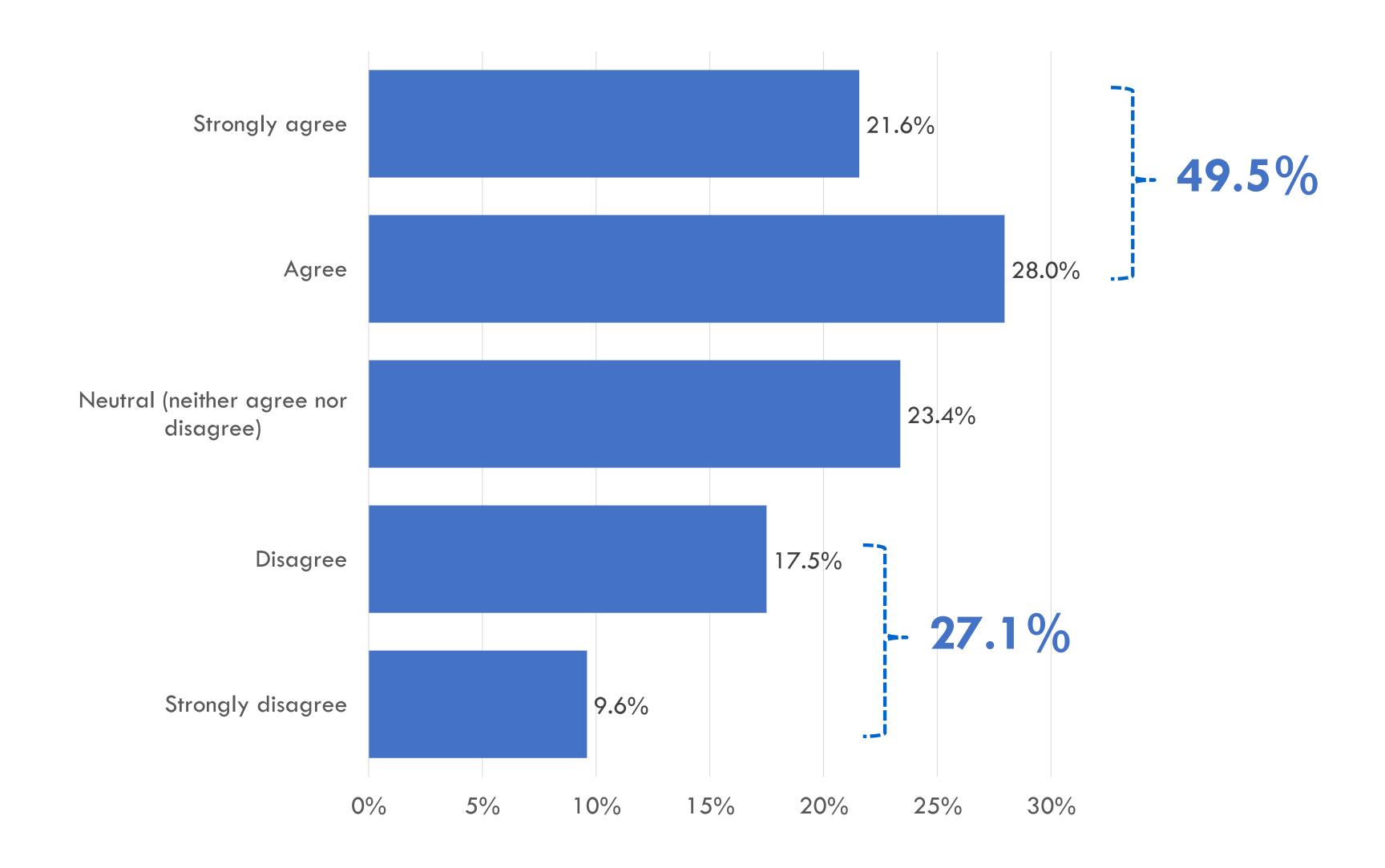




Loss on Interest in Leisure Travel

Question: Statement agreement.

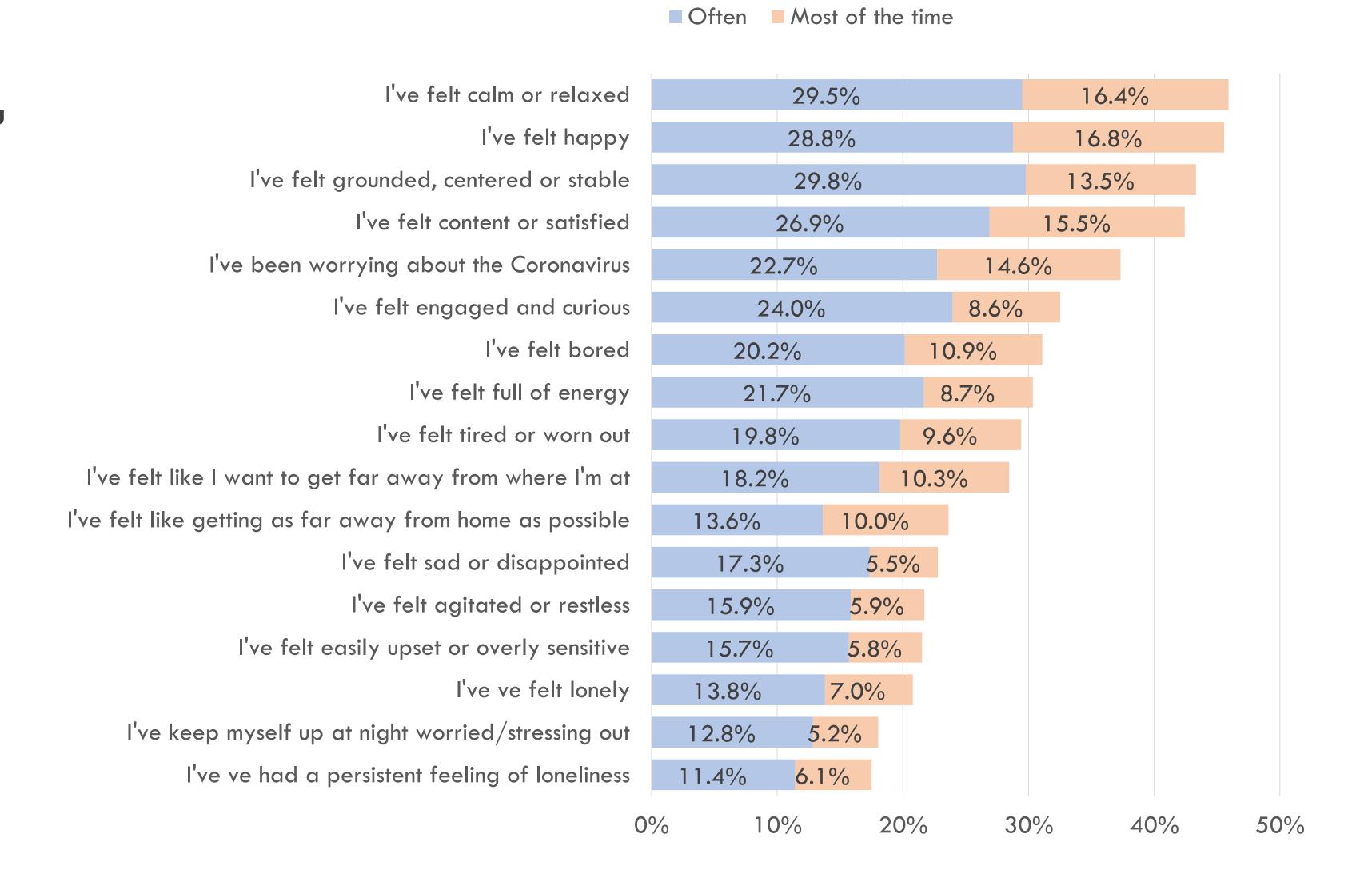
I have lost my interest in/taste for traveling for the time being





Mapping our Traveler Emotions

Question: Please tell us about how you have been feeling DURING THE LAST MONTH. Using the scale below, tell us how often you feel each?





Mapping our Traveler Emotions (Part 2)

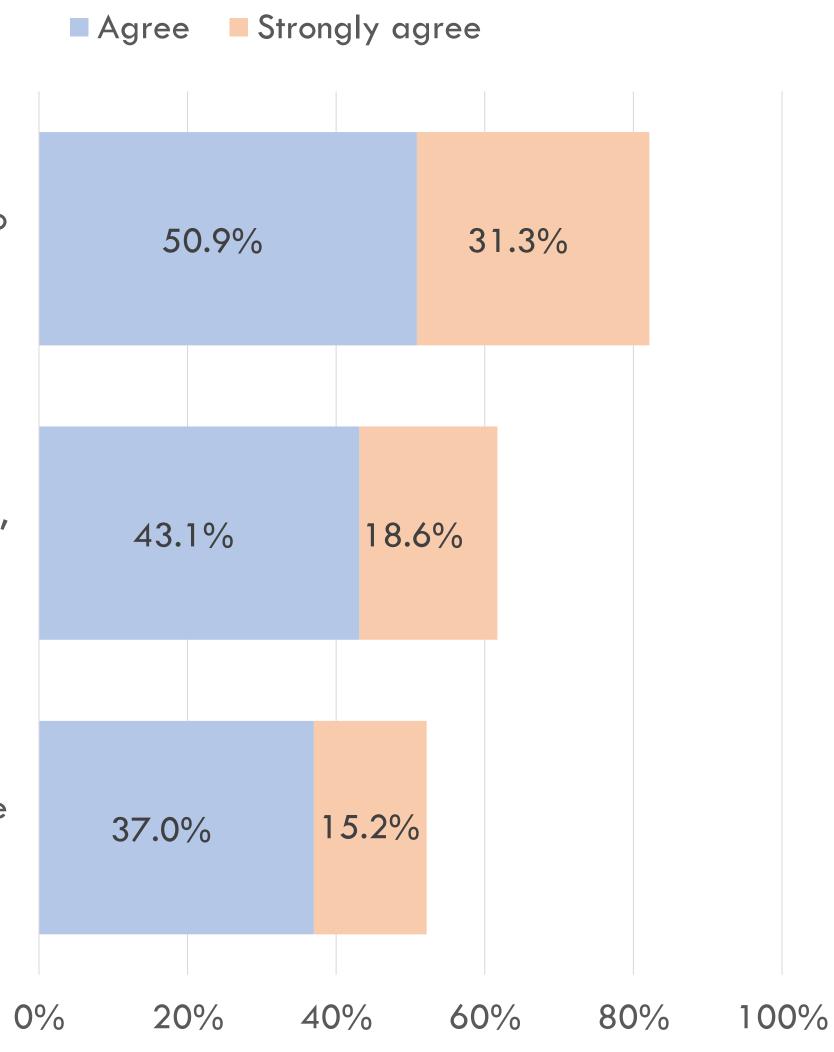
Question: How much do you agree or disagree with the following statements about yourself?

(Base: Wave 20 data. All respondents, 1,206 completed surveys. Data collected July 24-26, 2020)

I can take care of myself (and of those who depend on me) as well as ever

Once I've made up my mind about something, there's a good chance I won't change it

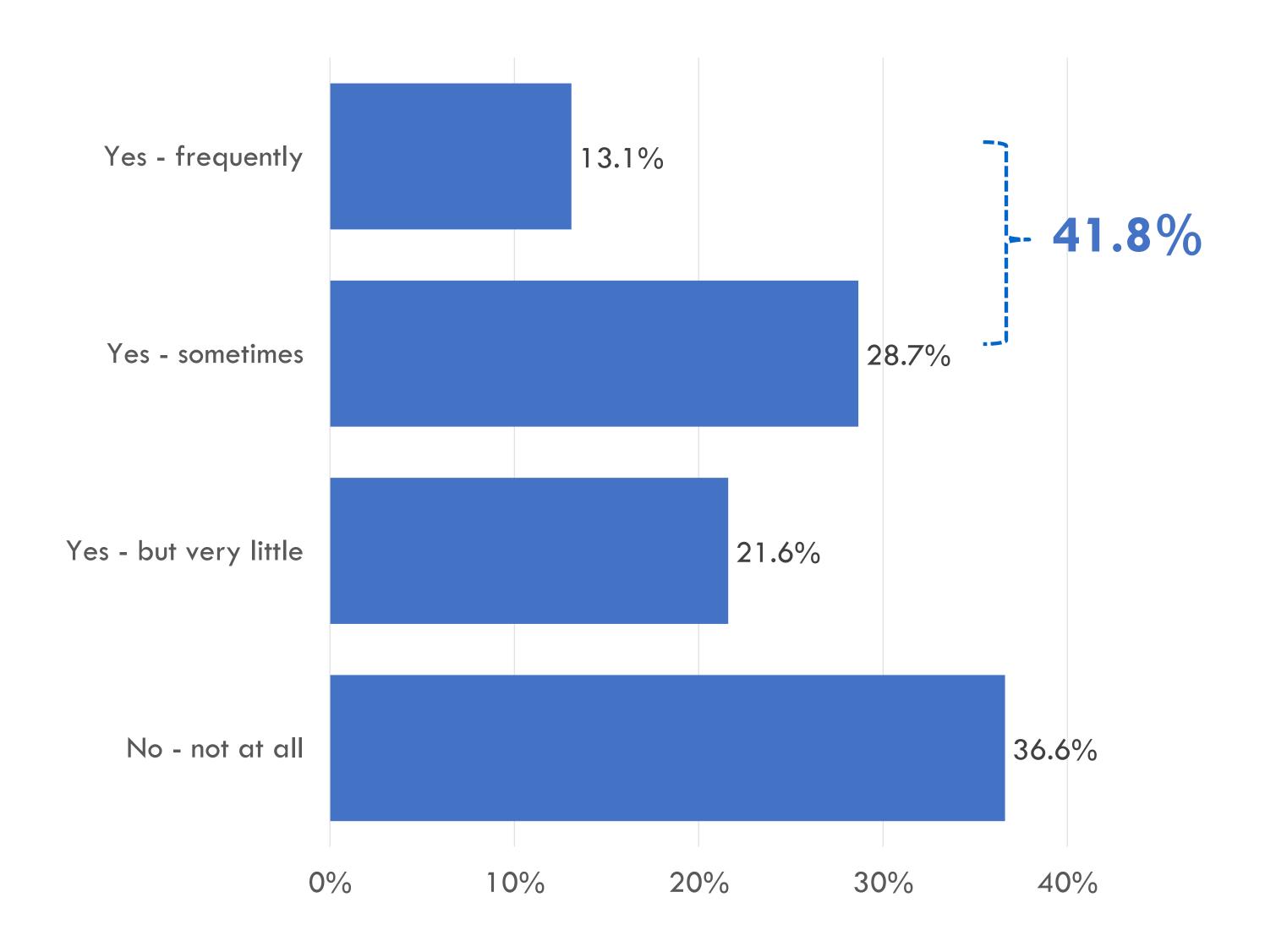
I generally keep my fears/concerns about the Coronavirus situation to myself



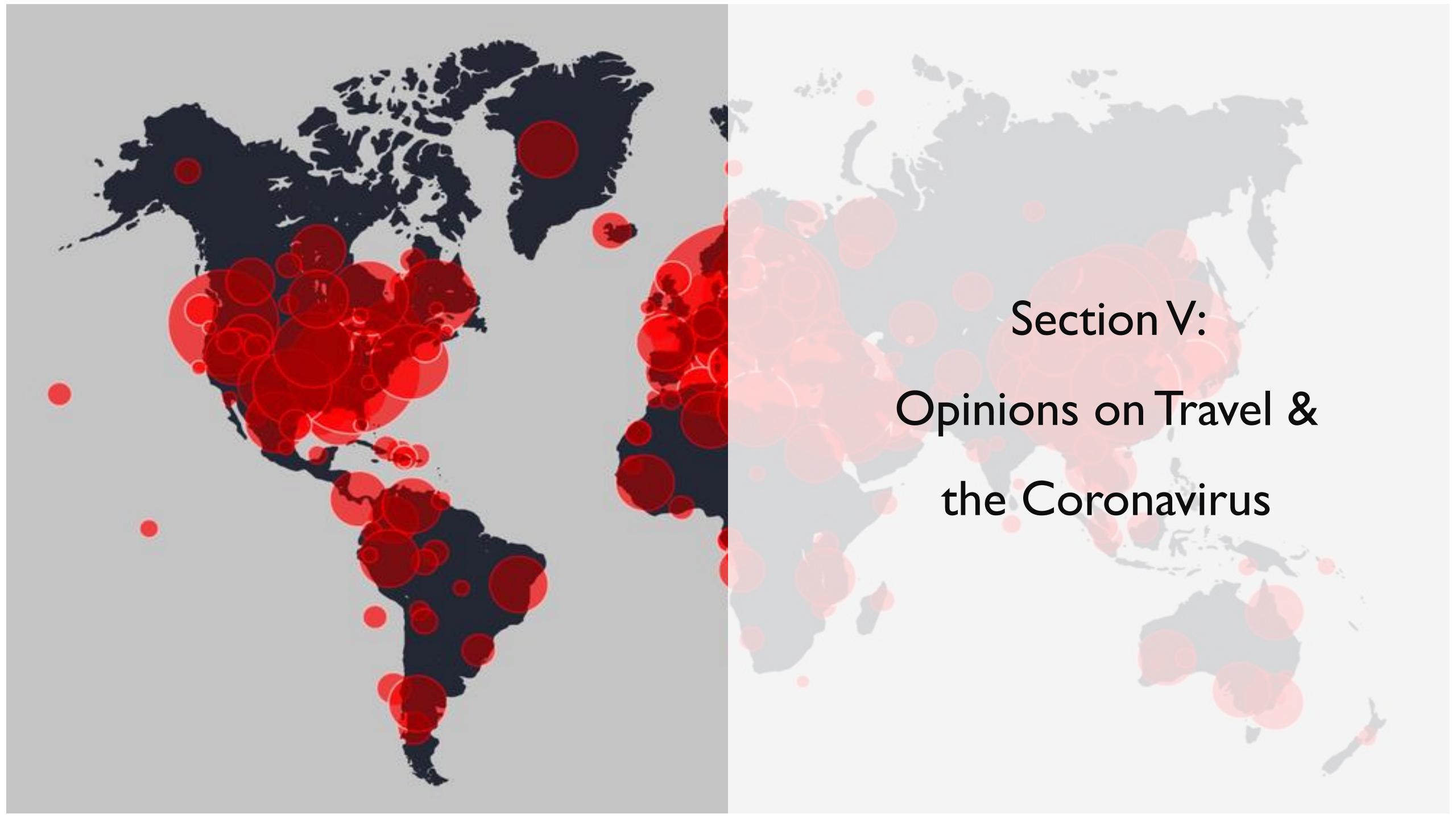


Loss of Sleep During the Pandemic

Question: Since the Coronavirus has emerged, have you experienced any sleep disturbances or changes in your sleep pattern?



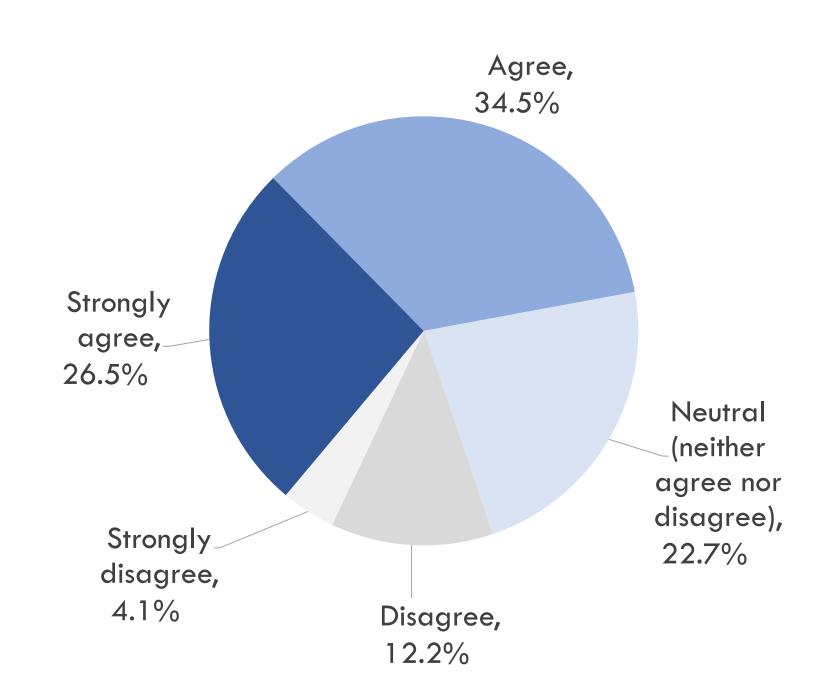




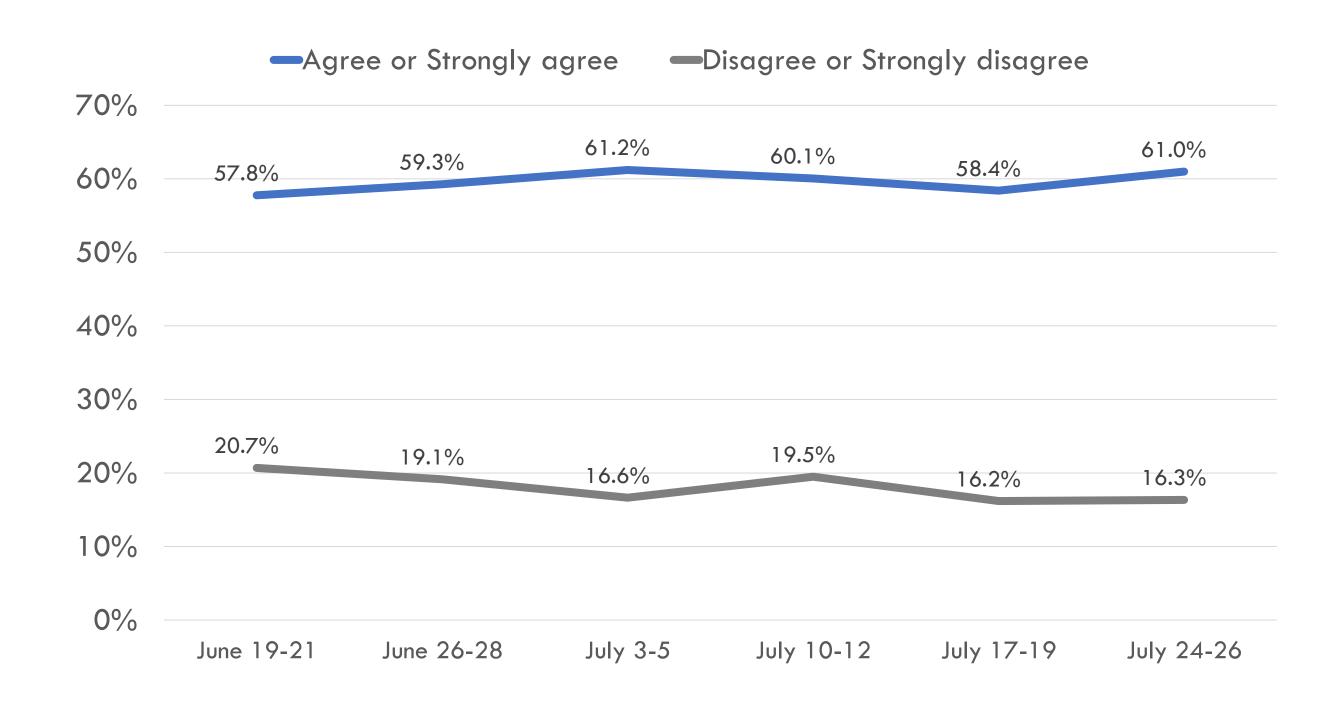
Community Social Distancing

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, 1,213, 1,200 and 1,206 completed surveys. Data collected June 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

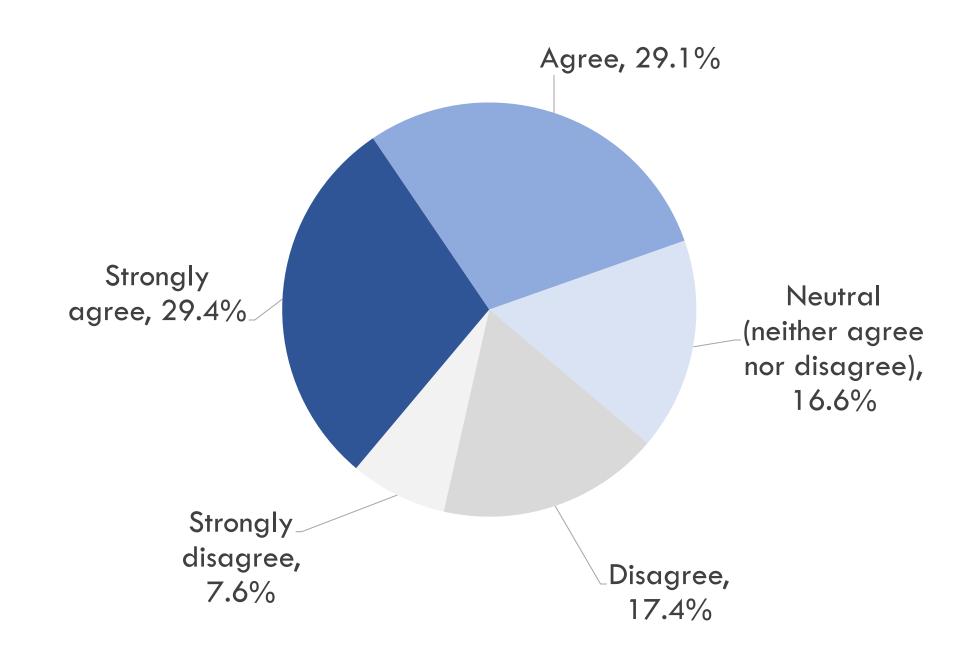




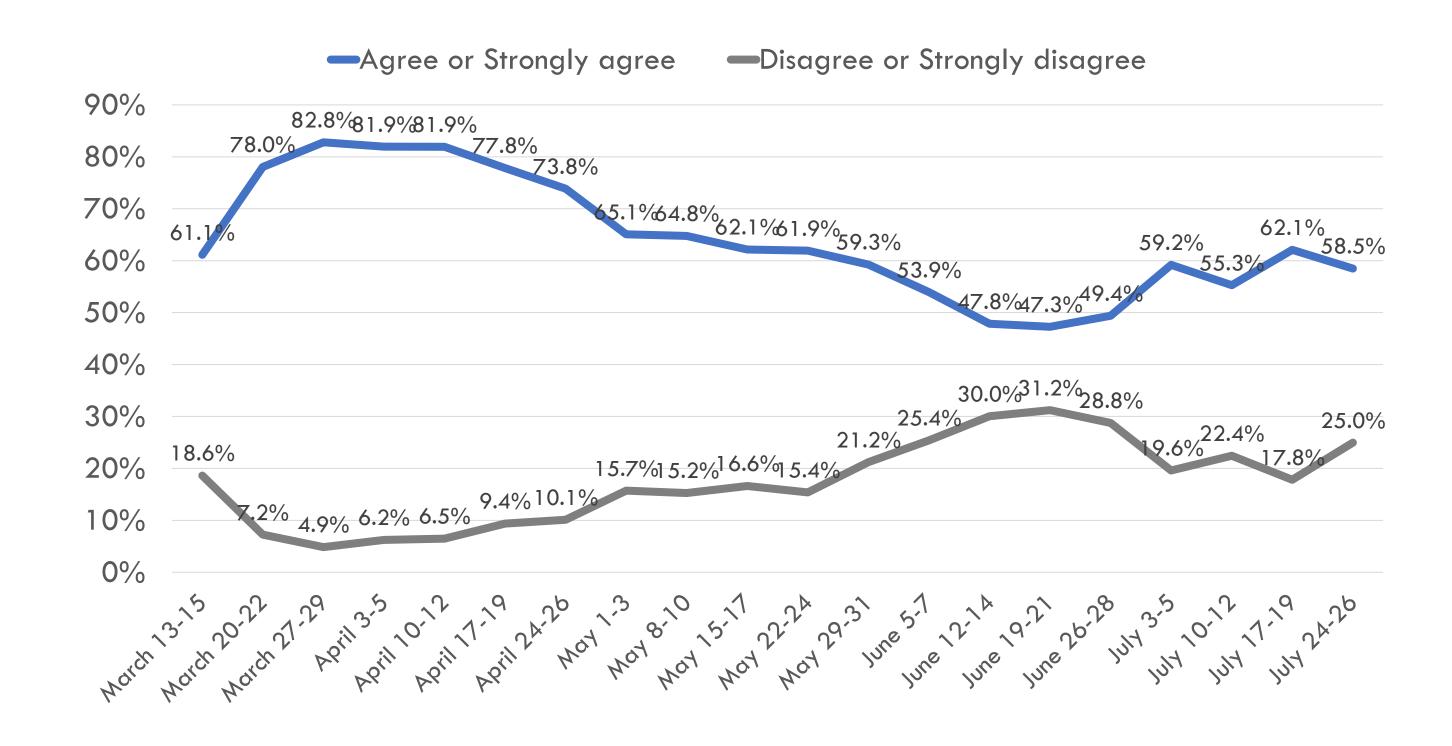
Avoiding Travel Until the Crisis Blows Over

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

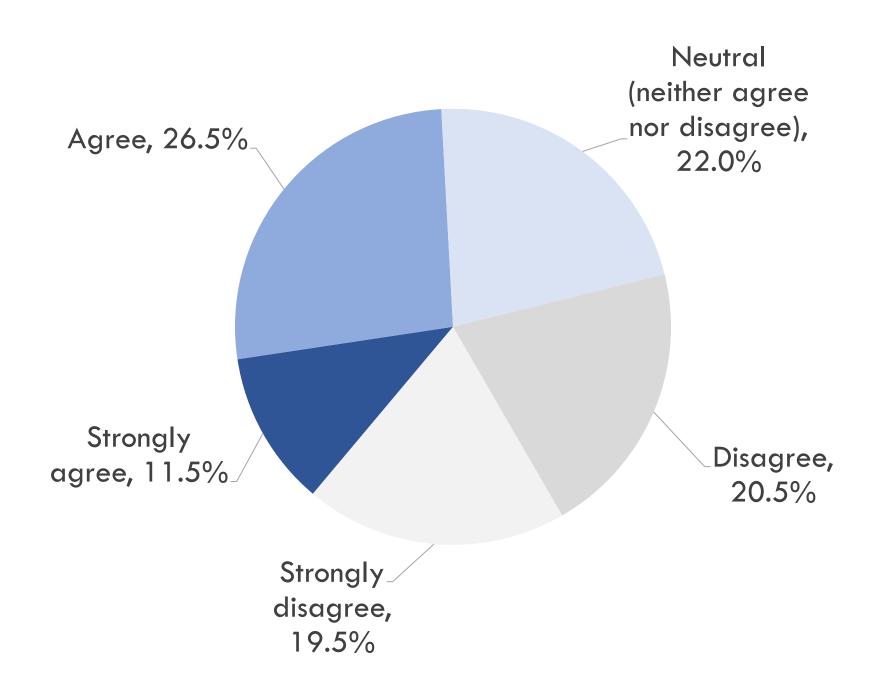




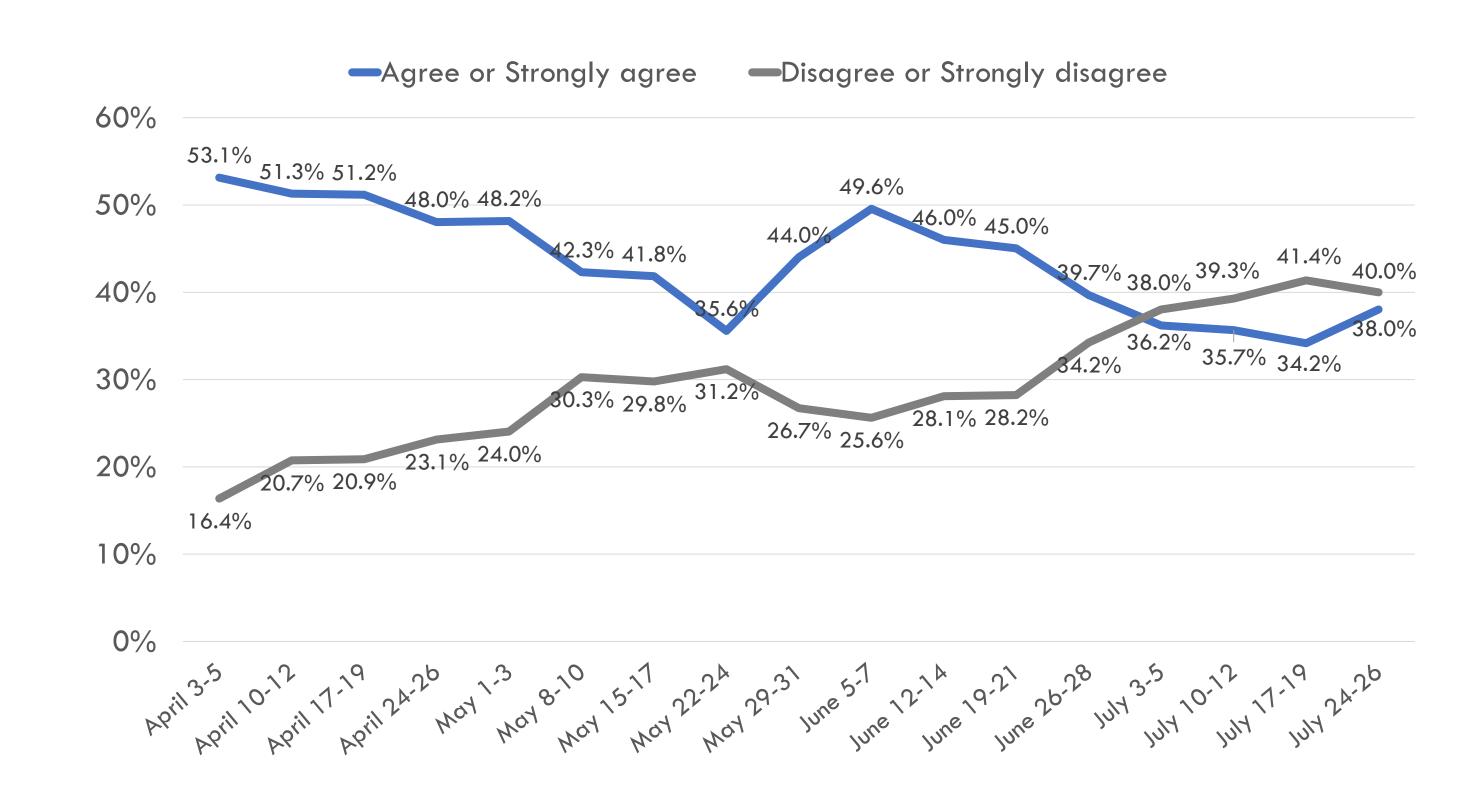
Expectations for Traveling in the Fall

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

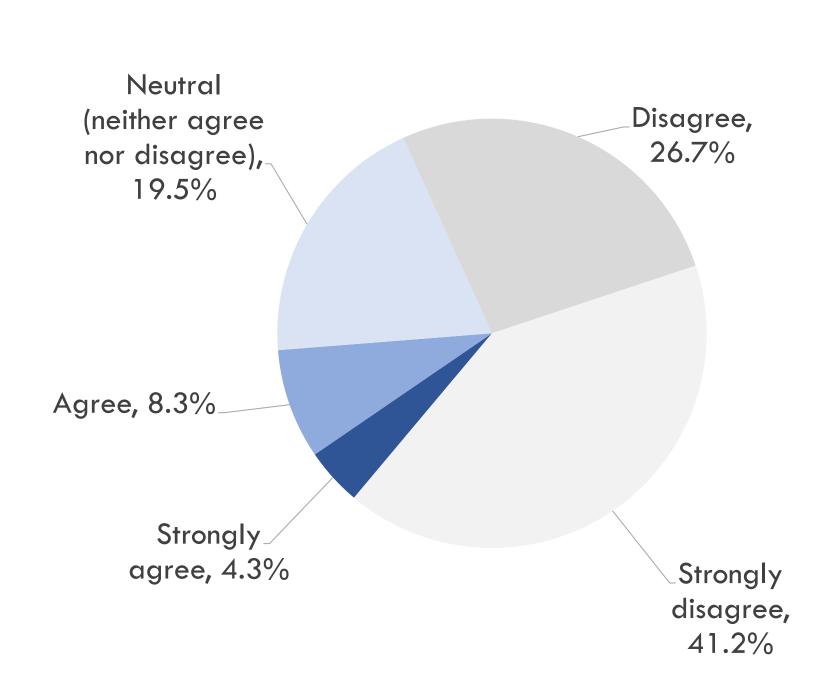




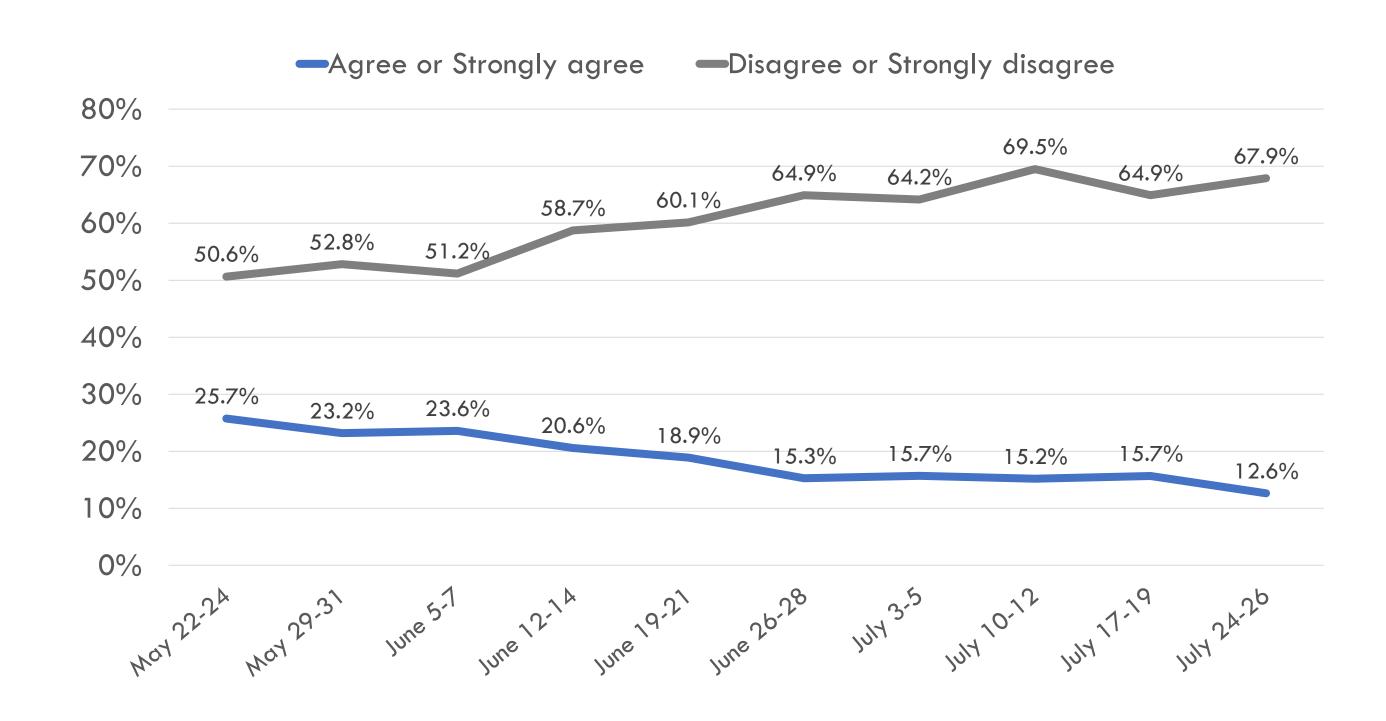
Expectations for Fall Travel Season

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, 1,213, 1,200 and 1,206 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

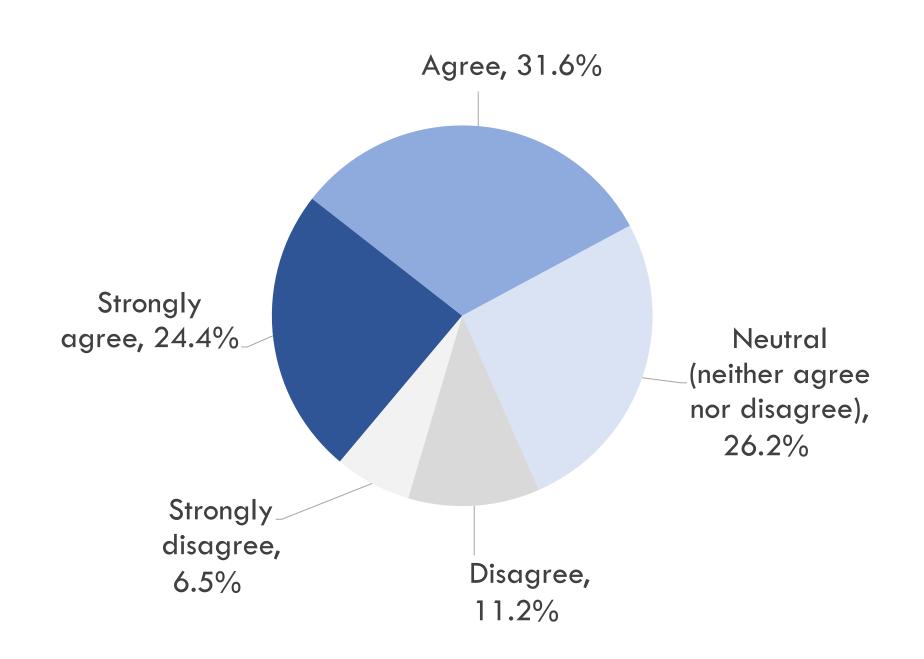




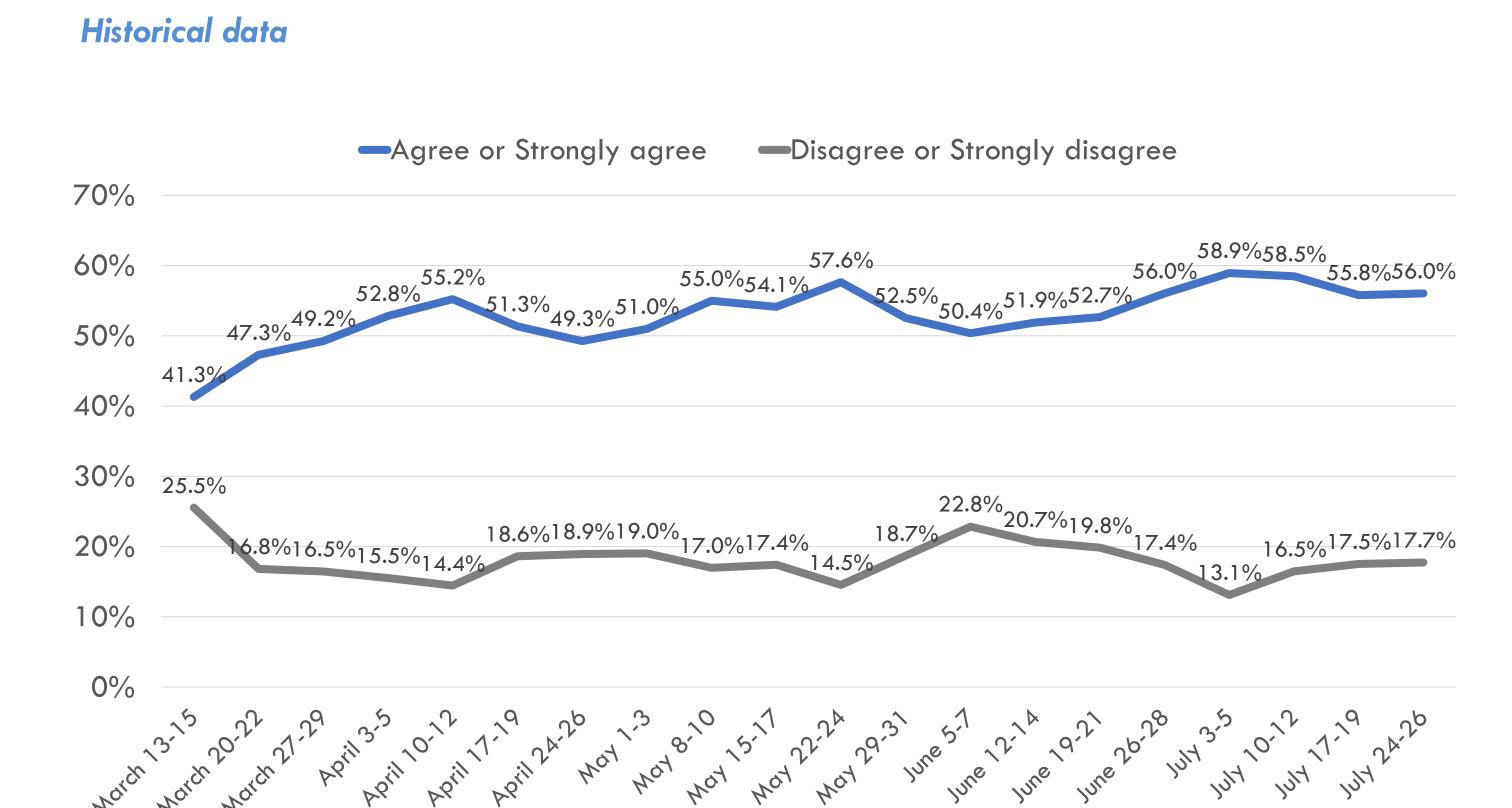
Staycations as a Replacement for Vacations

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

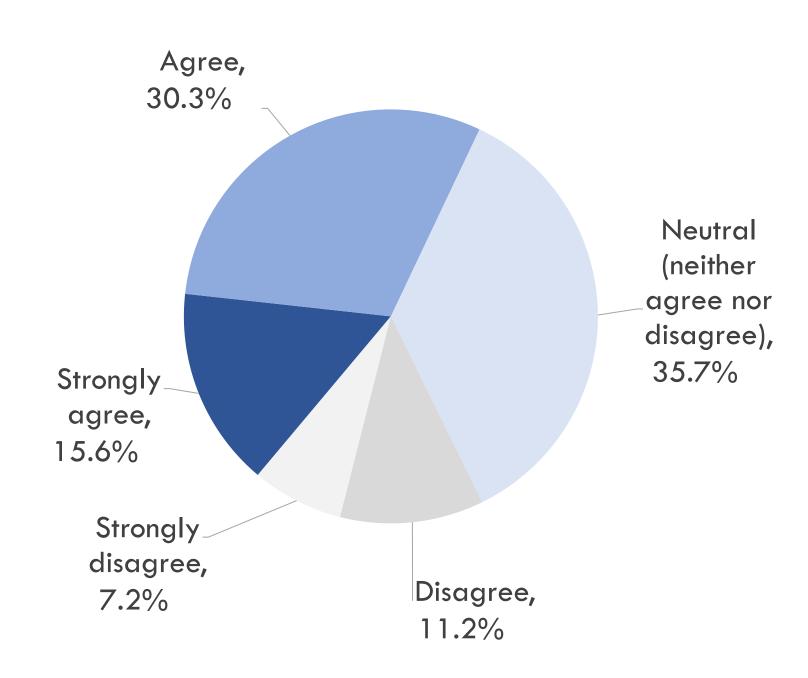




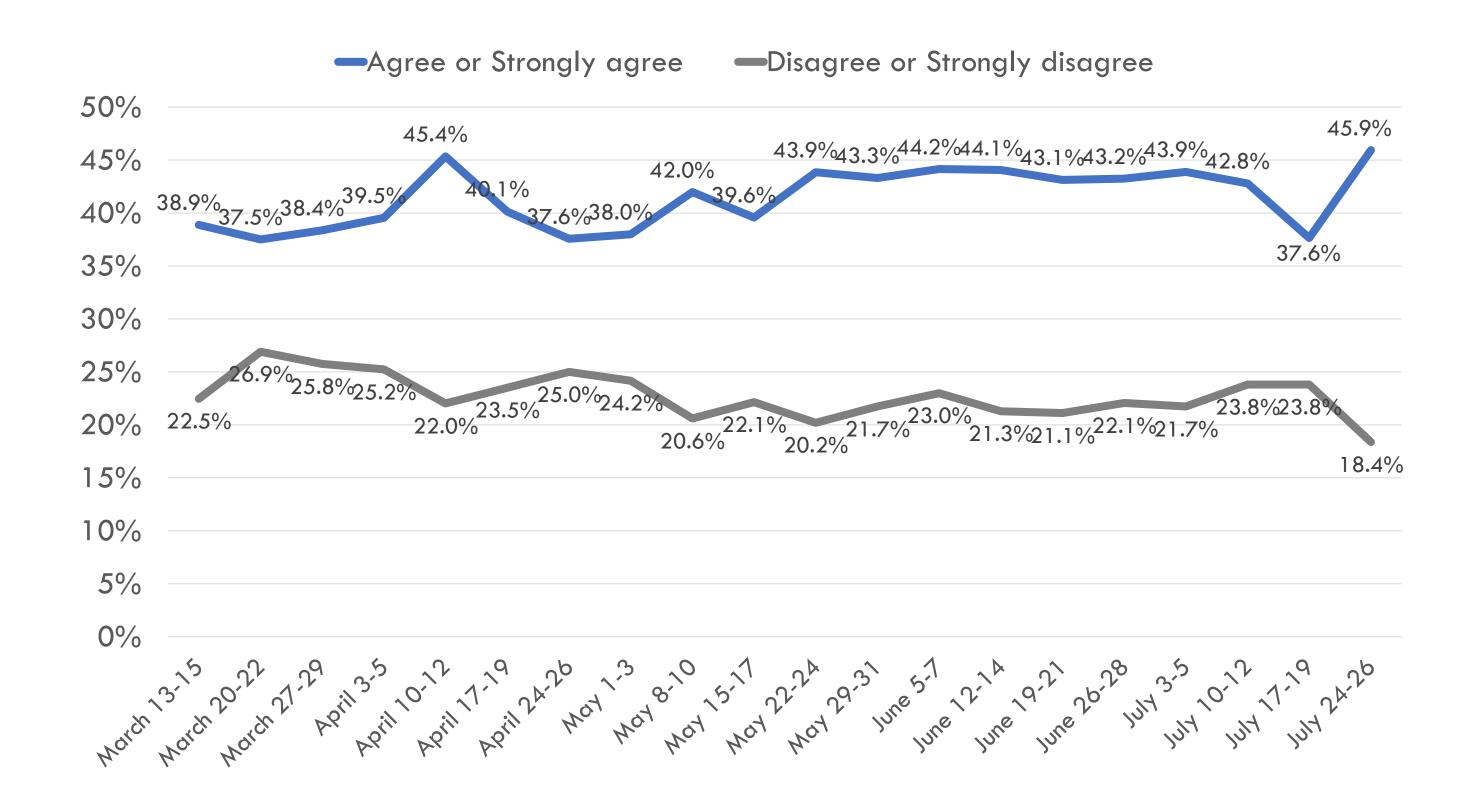
Replacing Air Travel With Road Trips

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

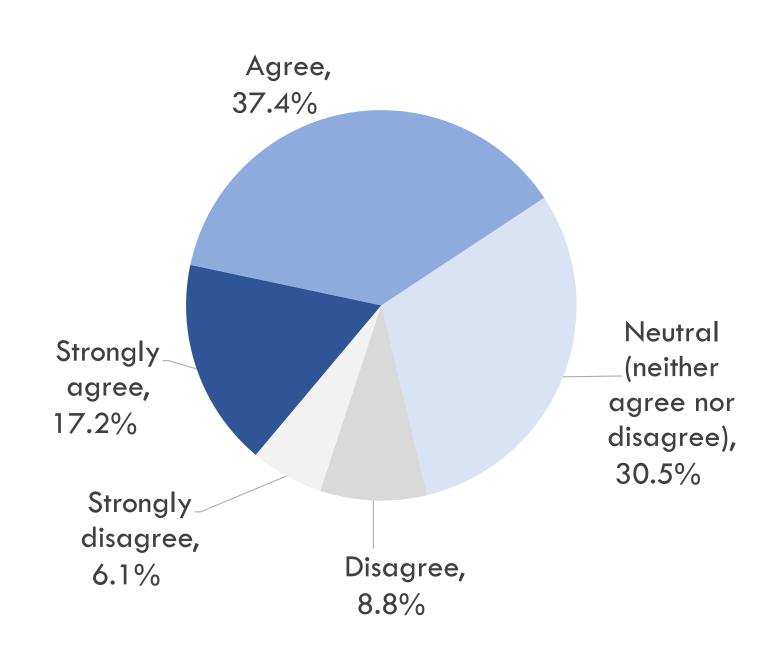




Replacing Long-Haul Travel with Regional Trips

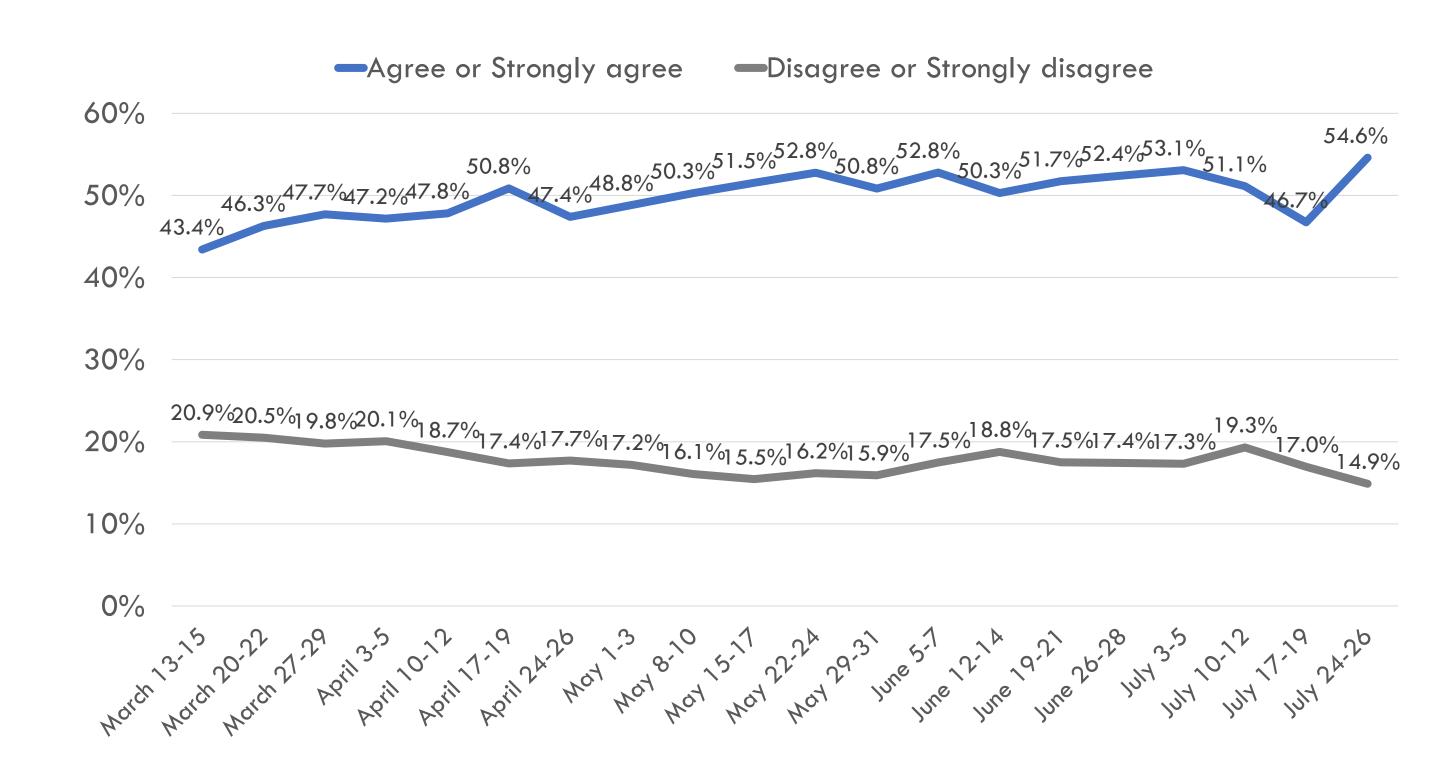
How much do you agree with the following statement?

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)



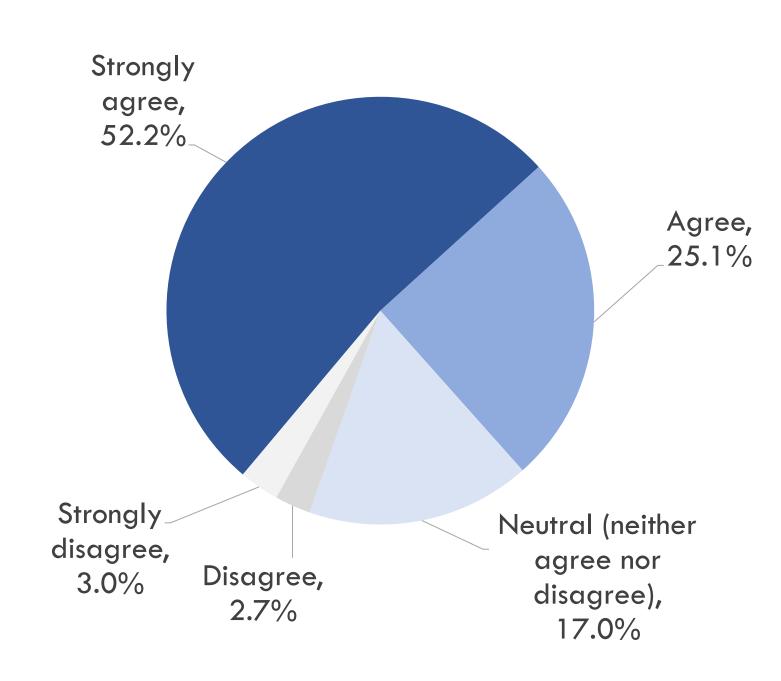




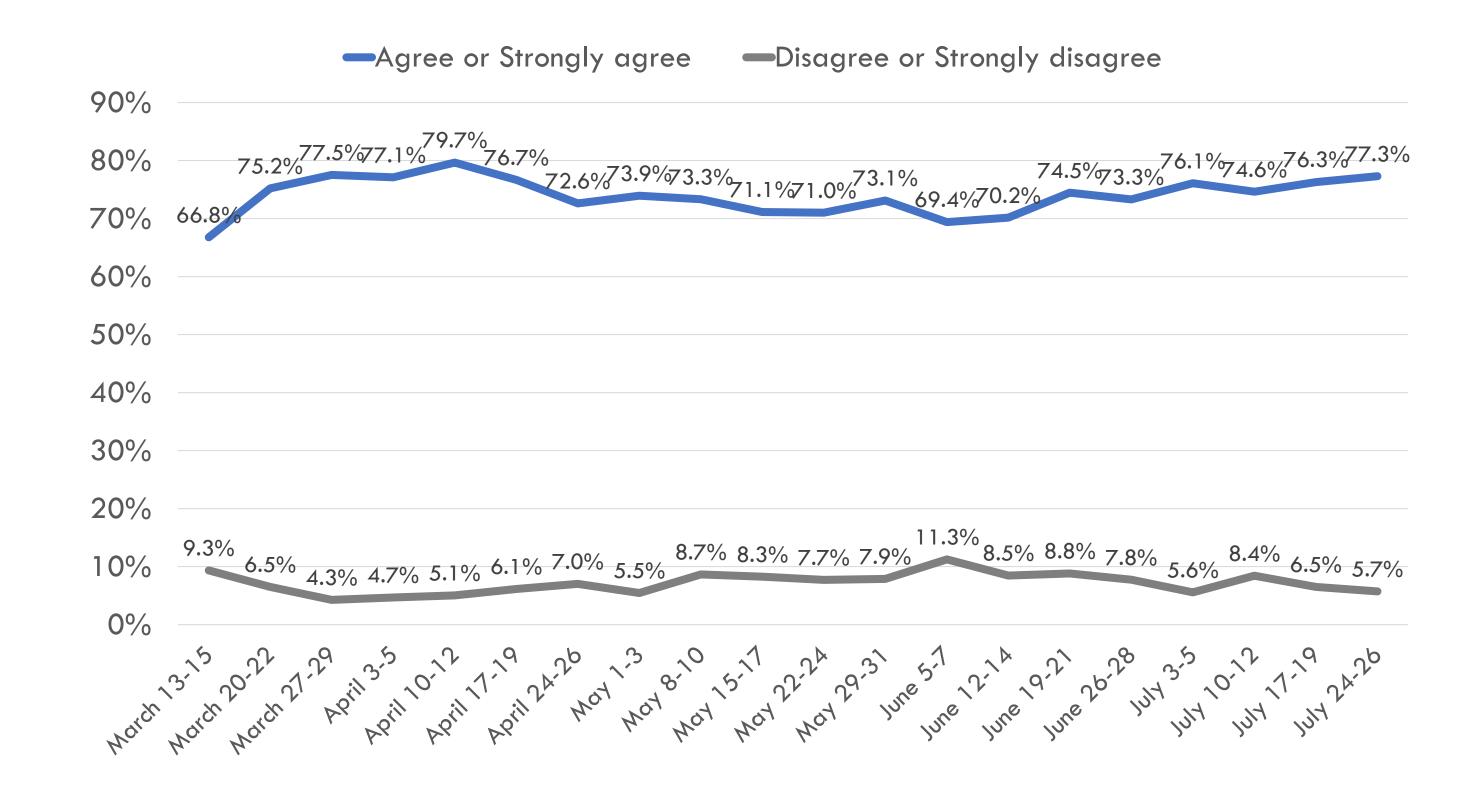
Avoiding Conventions & Conferences

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

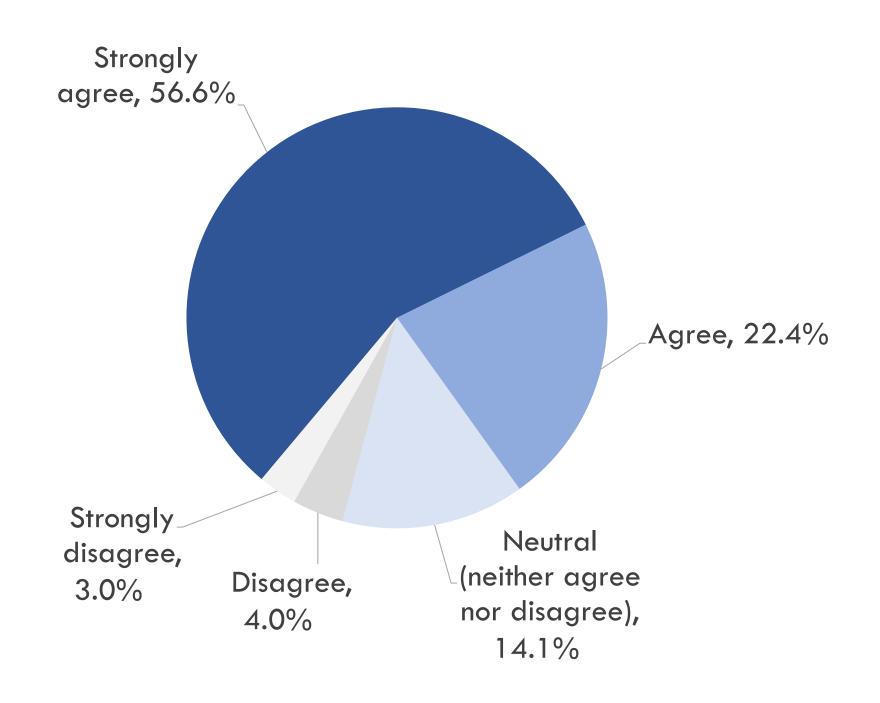




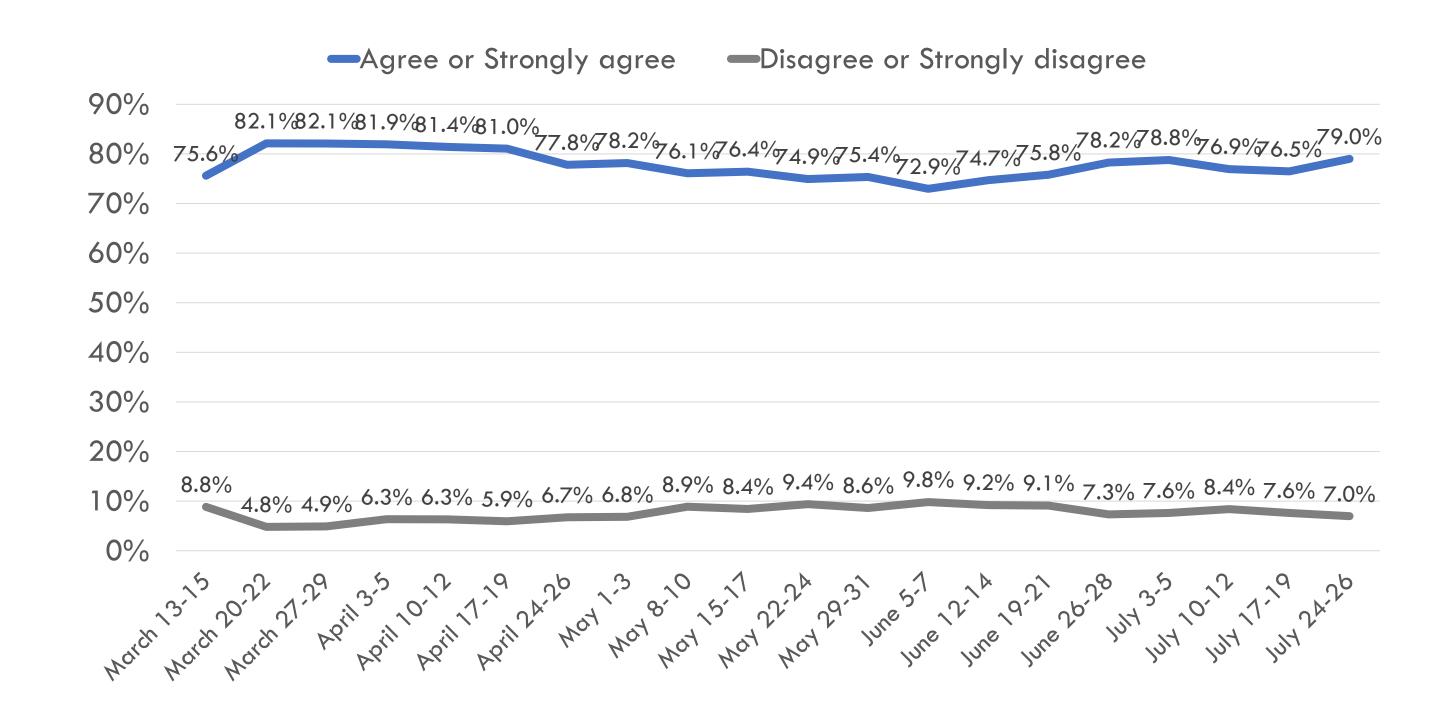
Avoiding International Travel

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

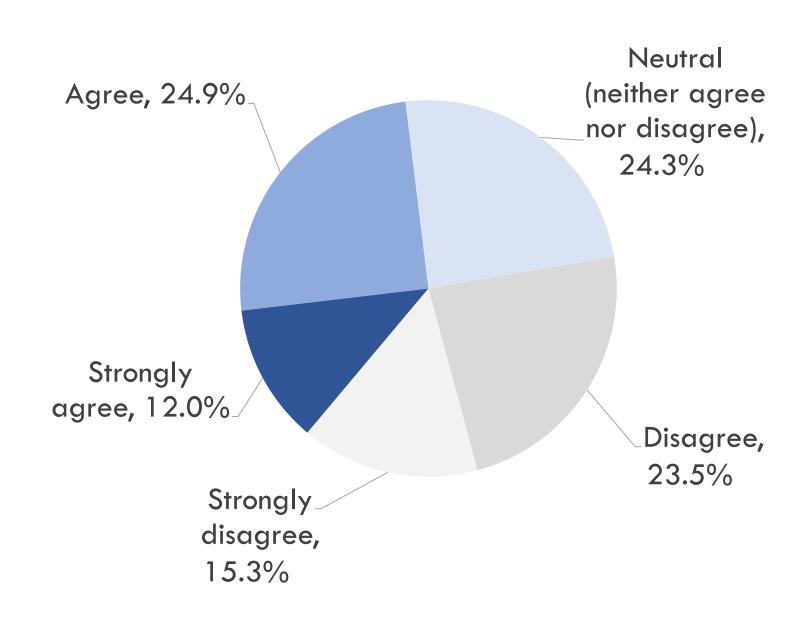




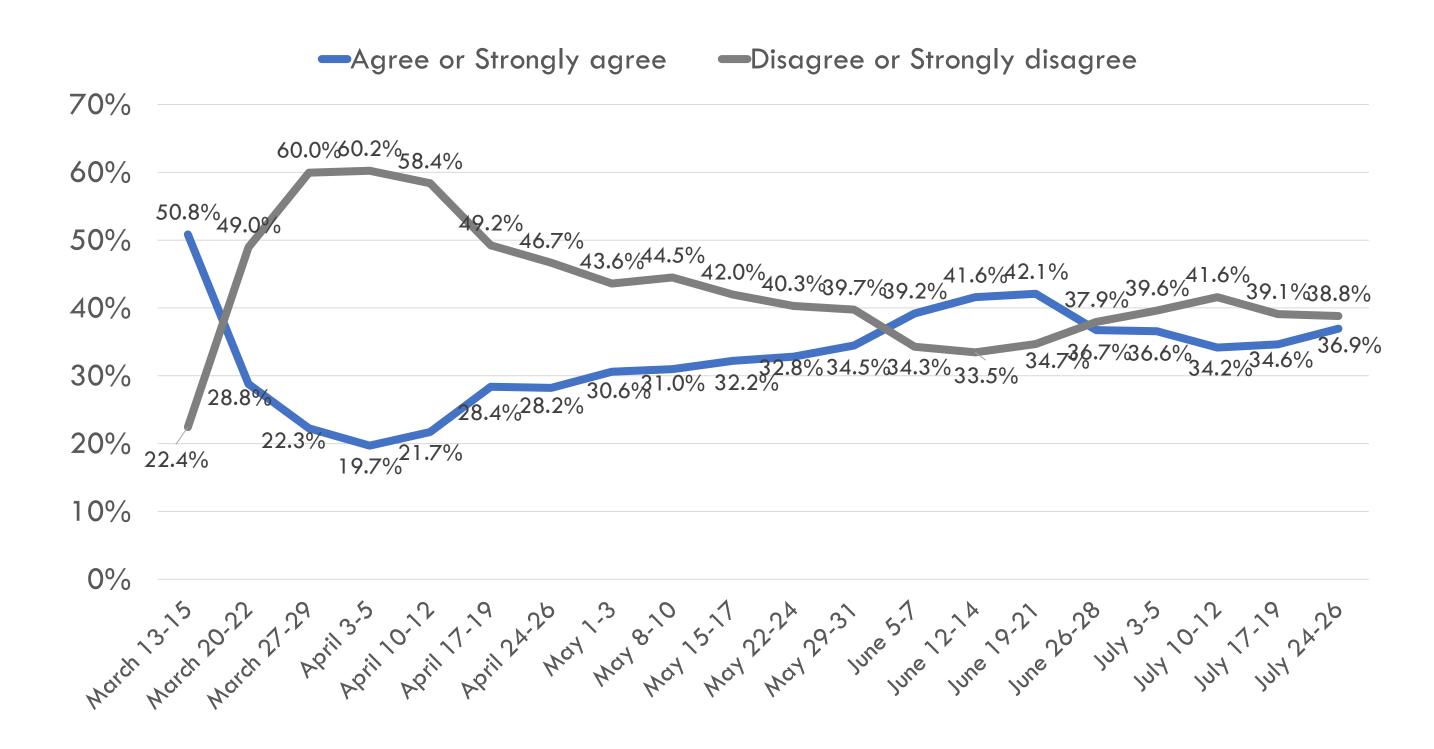
Comfort Enjoying Home Community

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)

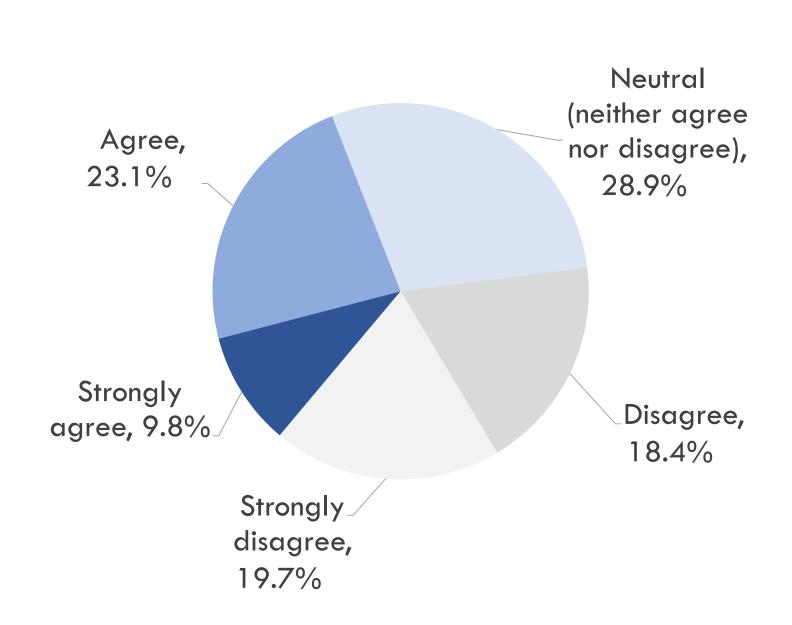




Discounts and Price Cuts

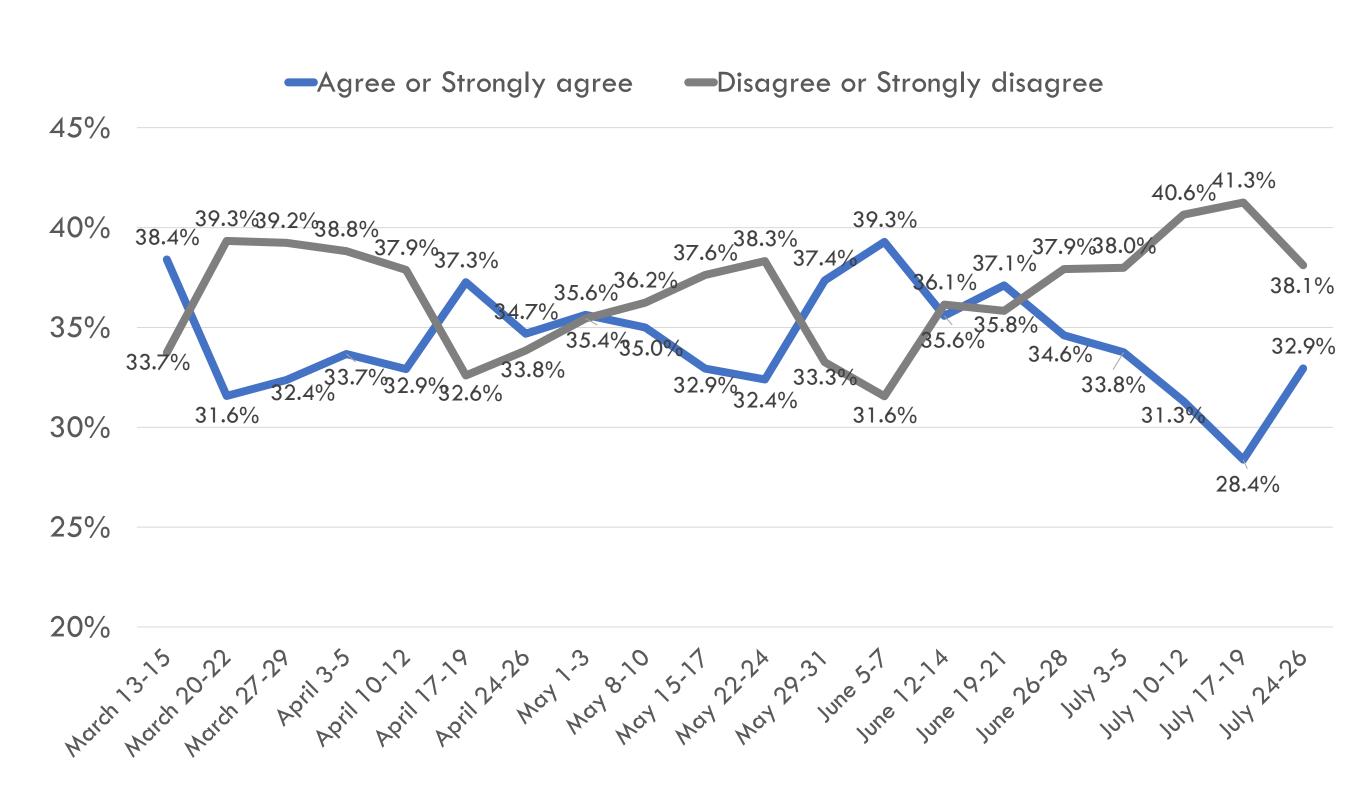
How much do you agree with the following statement?

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, 1,213, 1,200 and 1,206 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19 and 24-26, 2020)



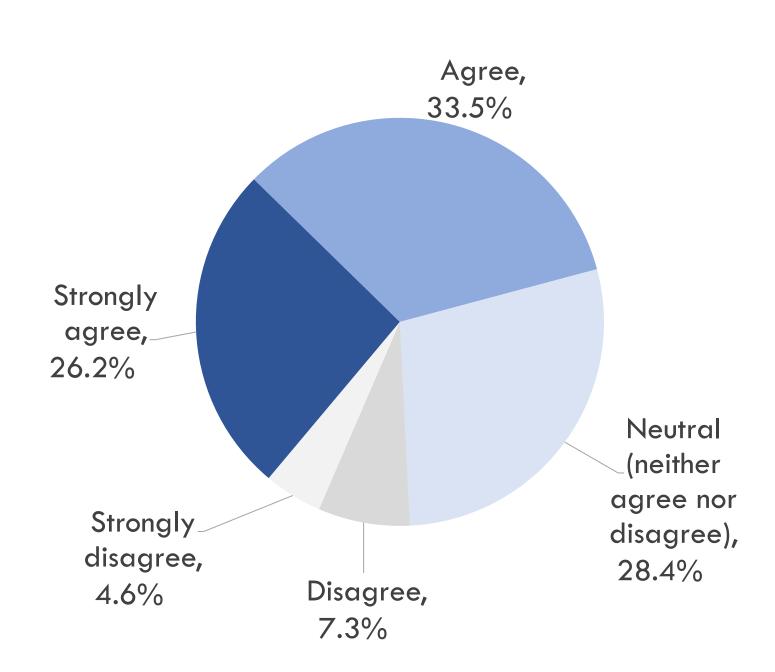




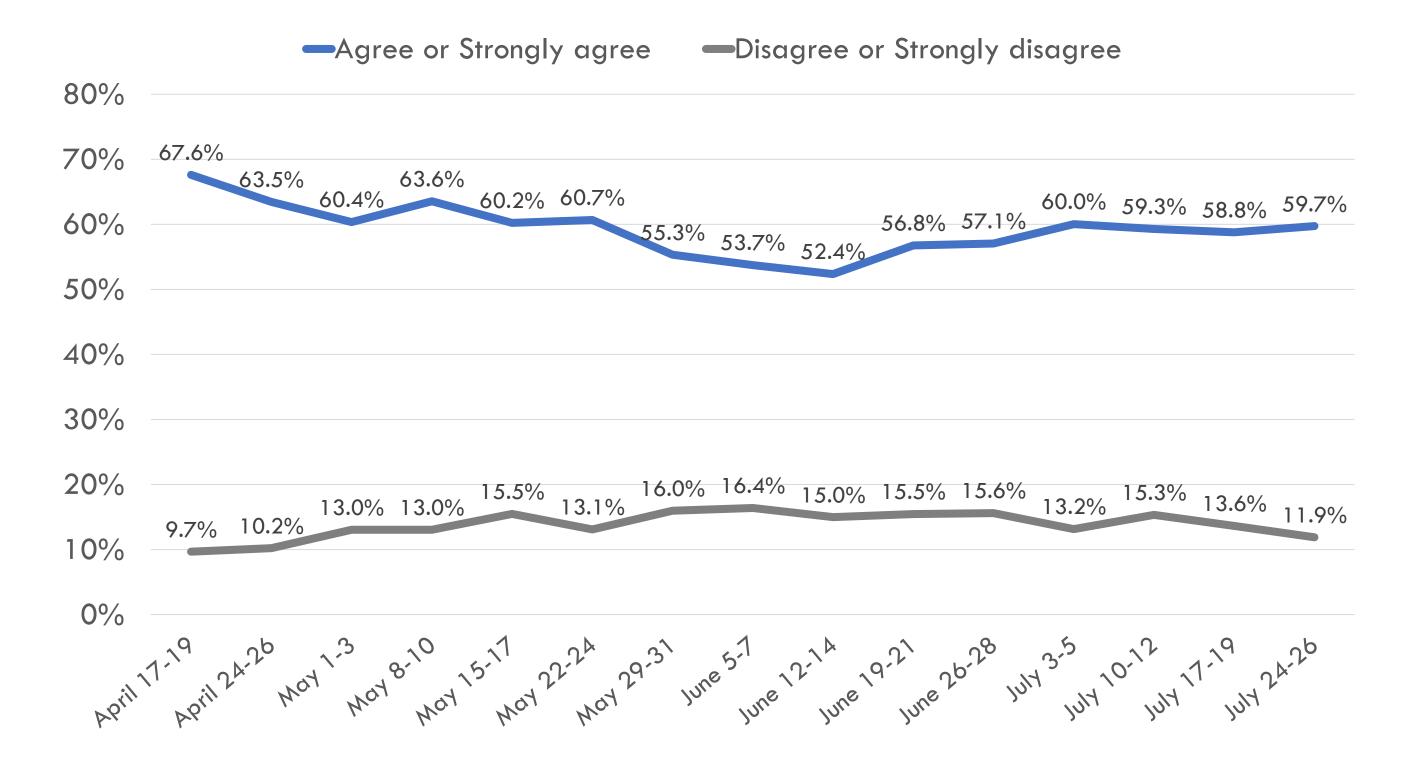
Travelers in Community are Unwanted

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, 1,213, 1,200 and 1,206 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, 10-12, 17-19 and 24-26, 2020)

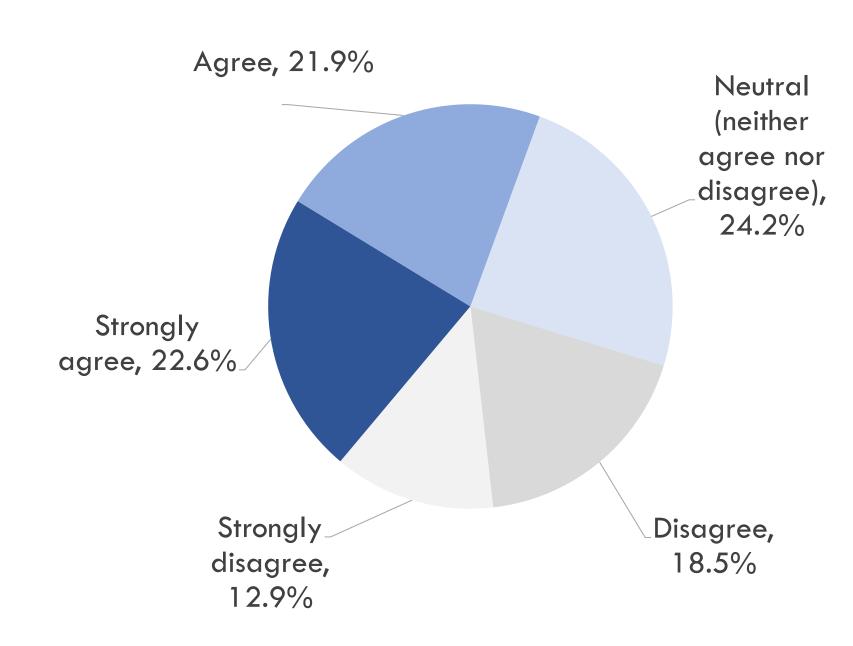




Won't Travel Without Vaccine

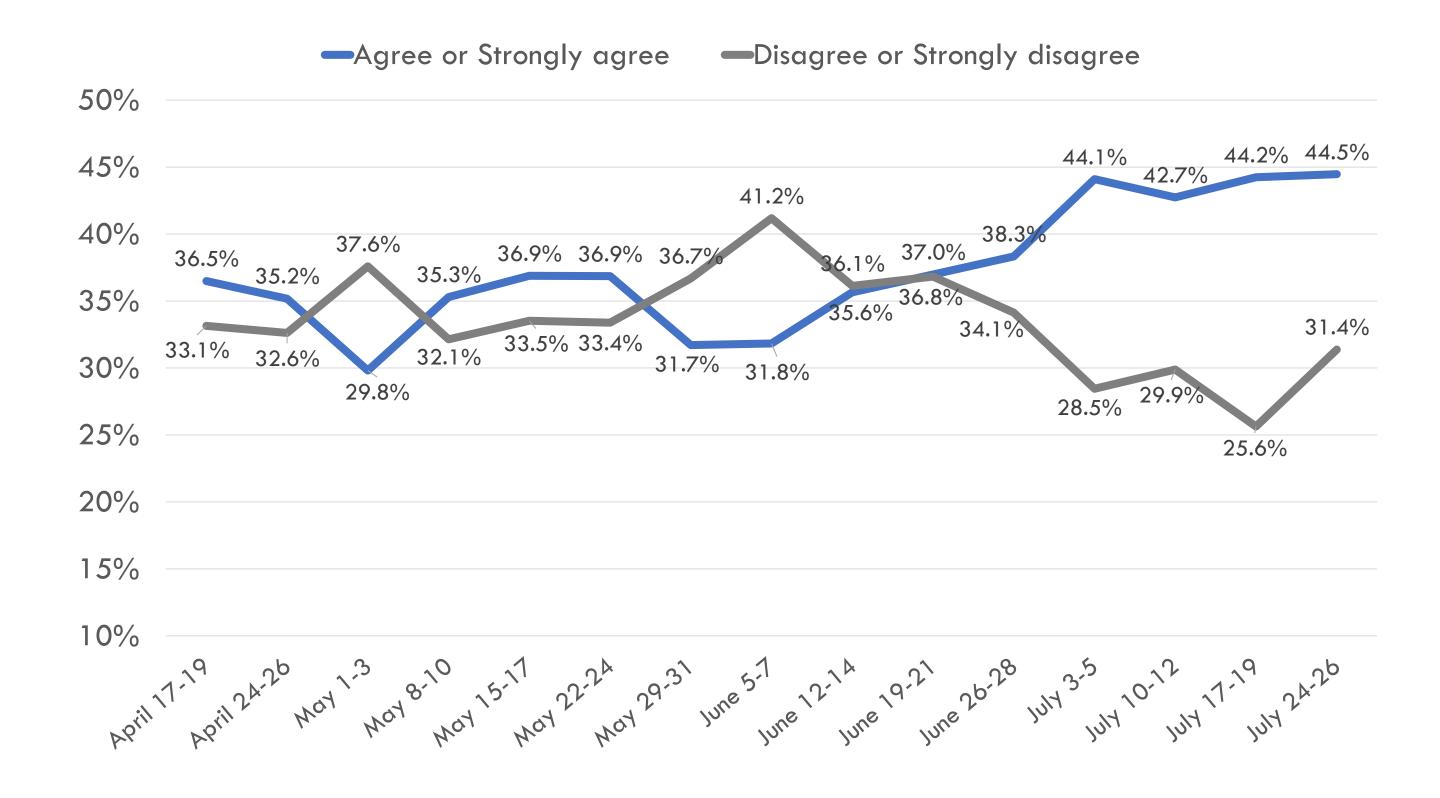
How much do you agree with the following statement?

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, 1,213, 1,200 and 1,206 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, 10-12, 17-19 and 24-26, 2020)

Historical data







Highlights from the Week of July 27th



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

What is a Predictive Index?



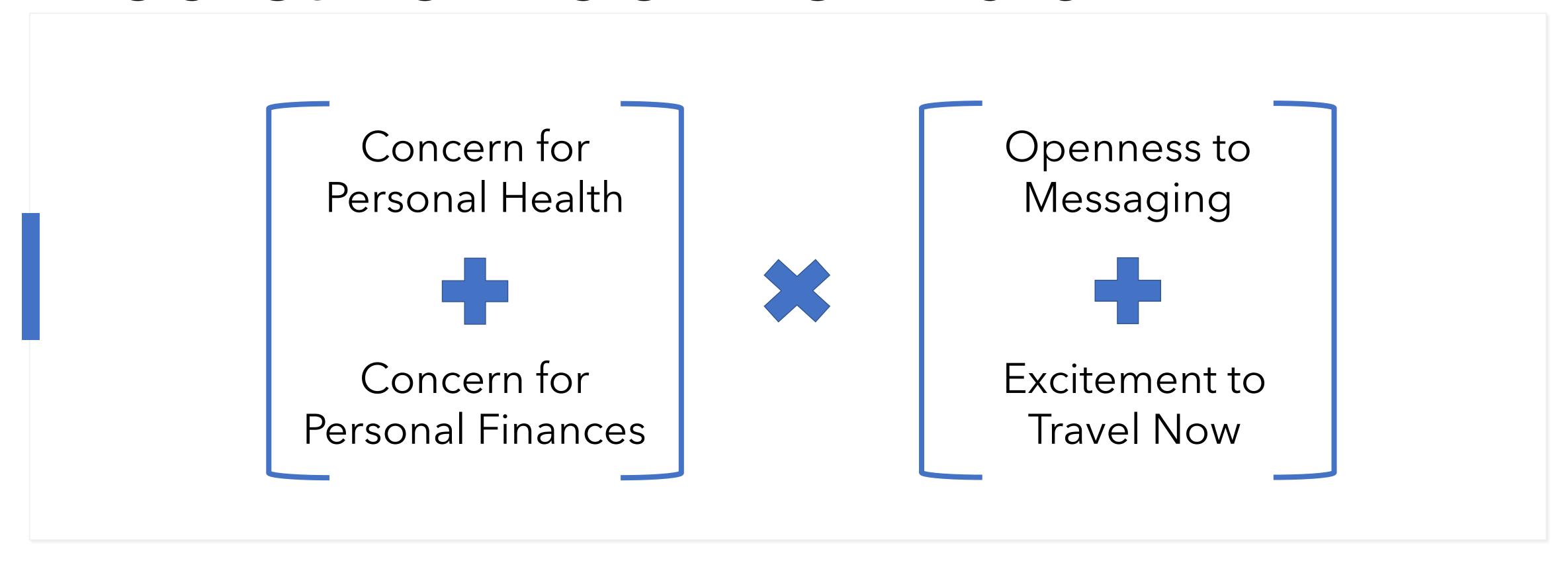
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

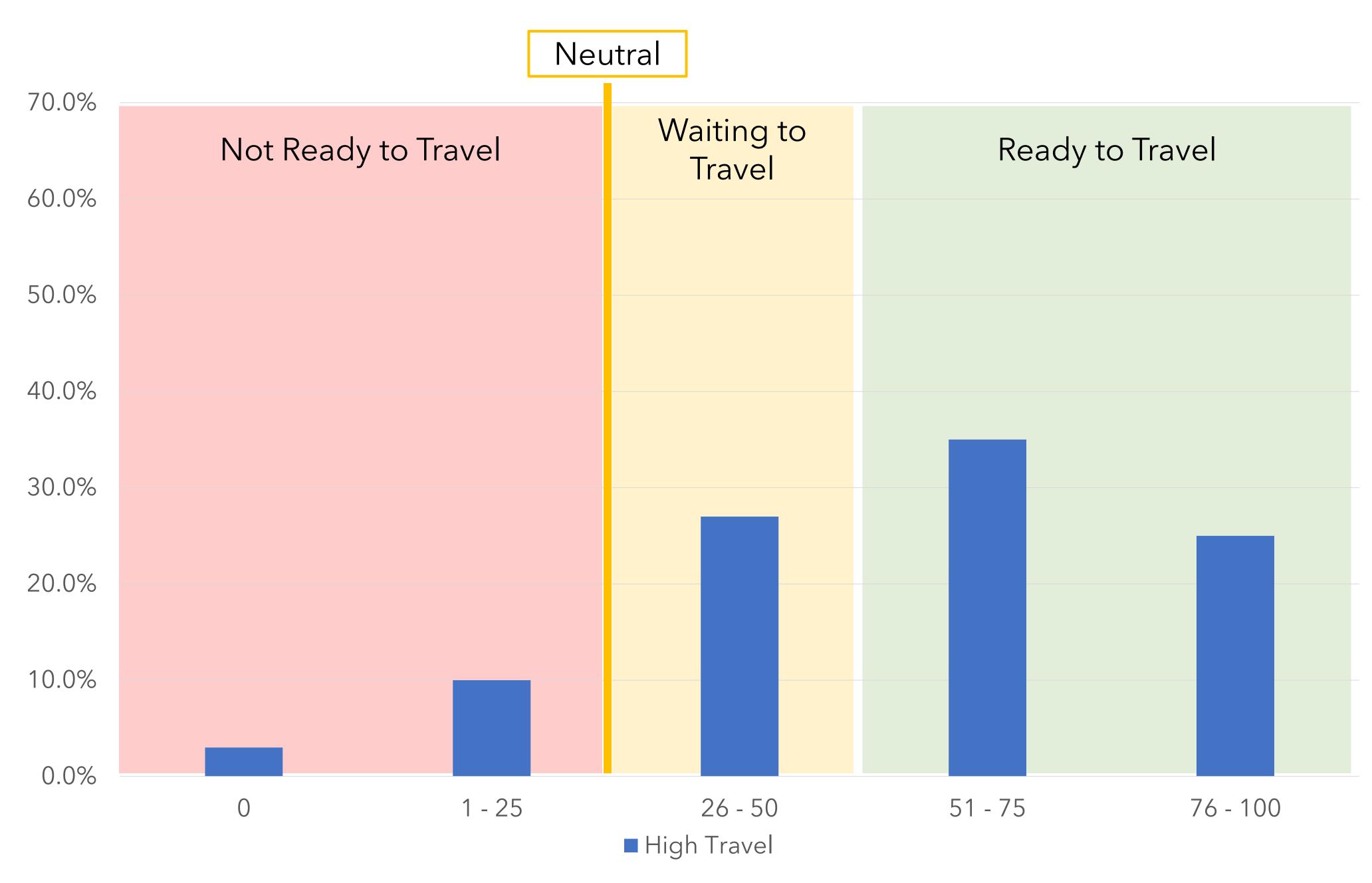
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

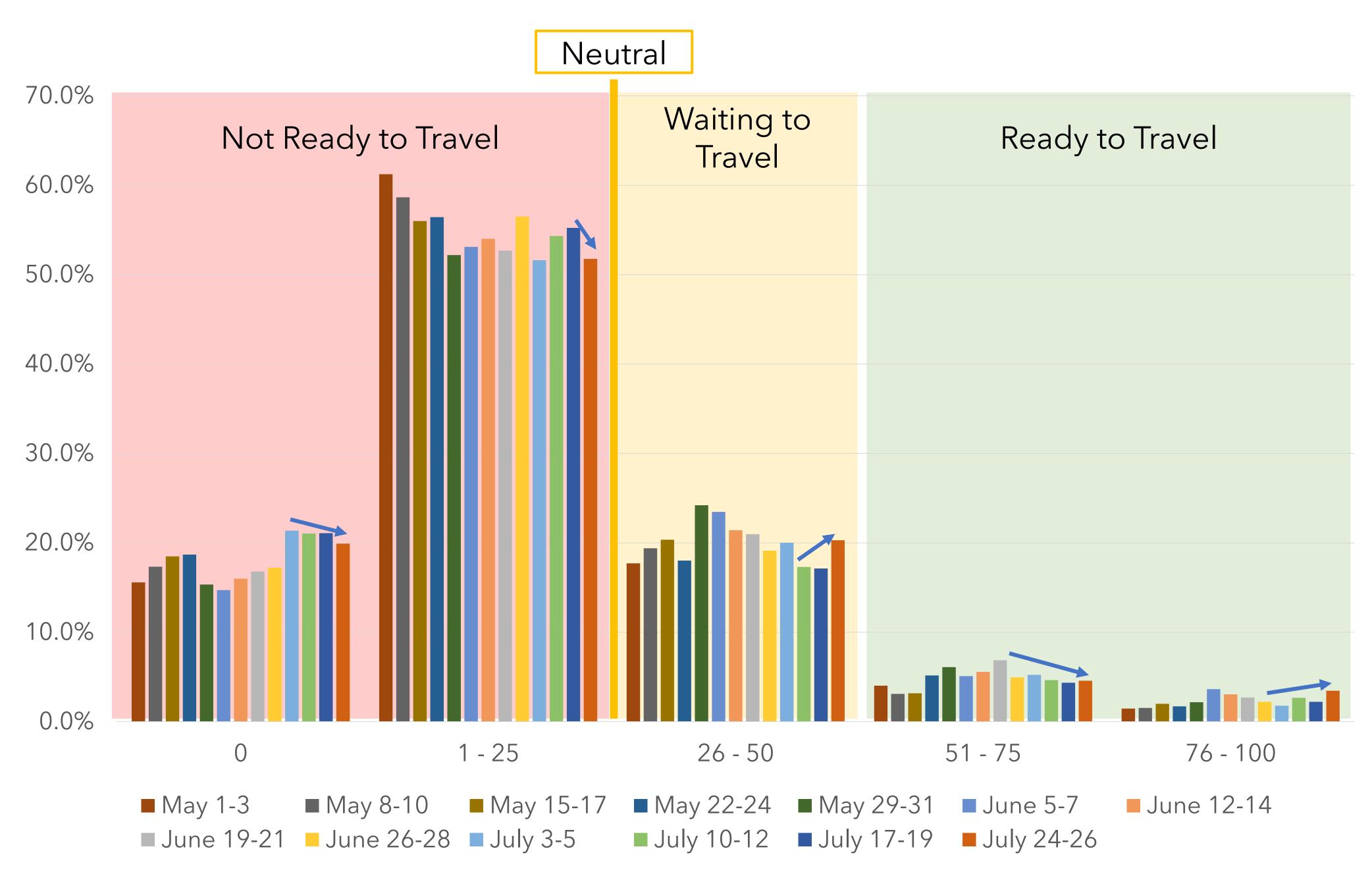


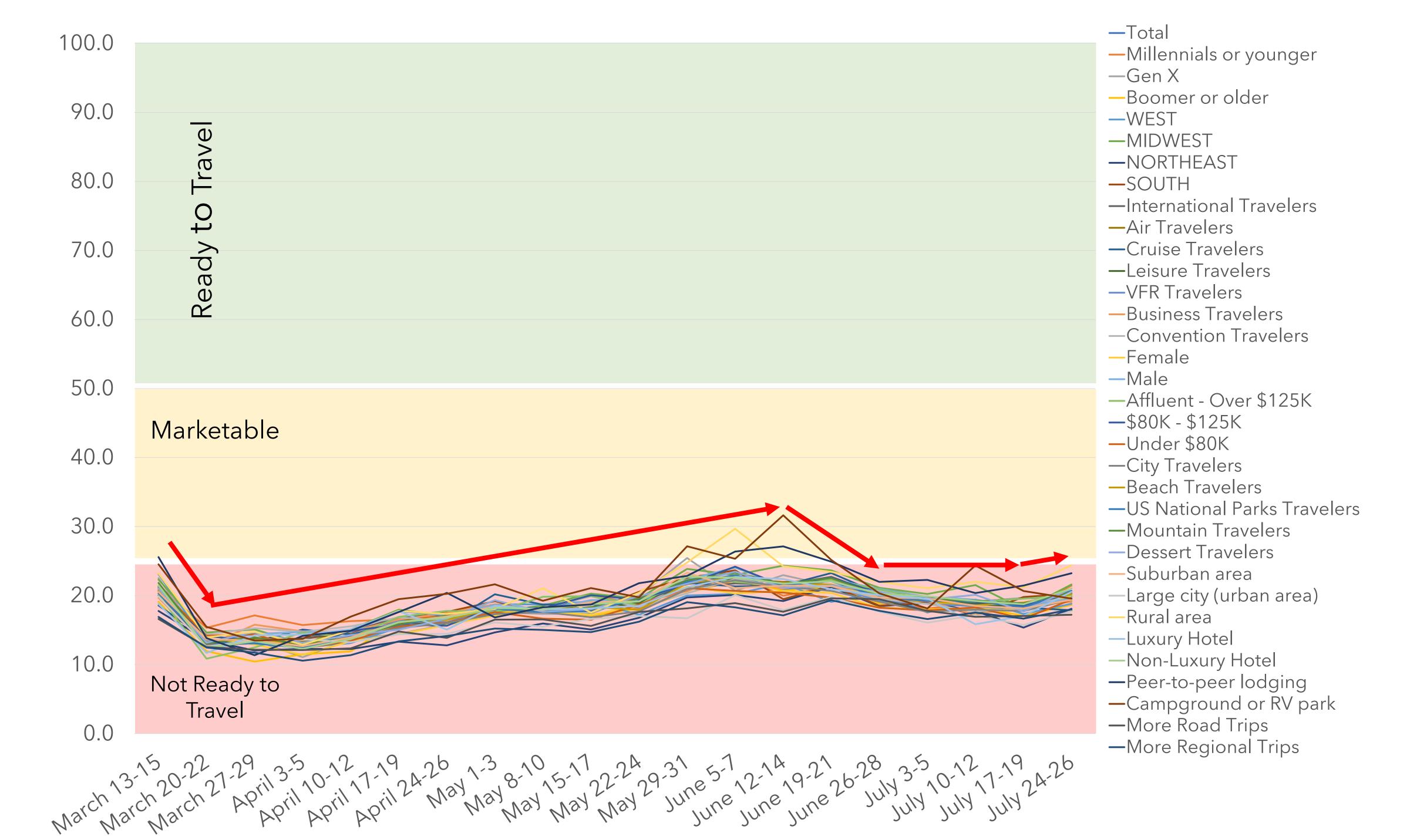
*Normalized to a 100pt scale

Healthy Travel Outlook



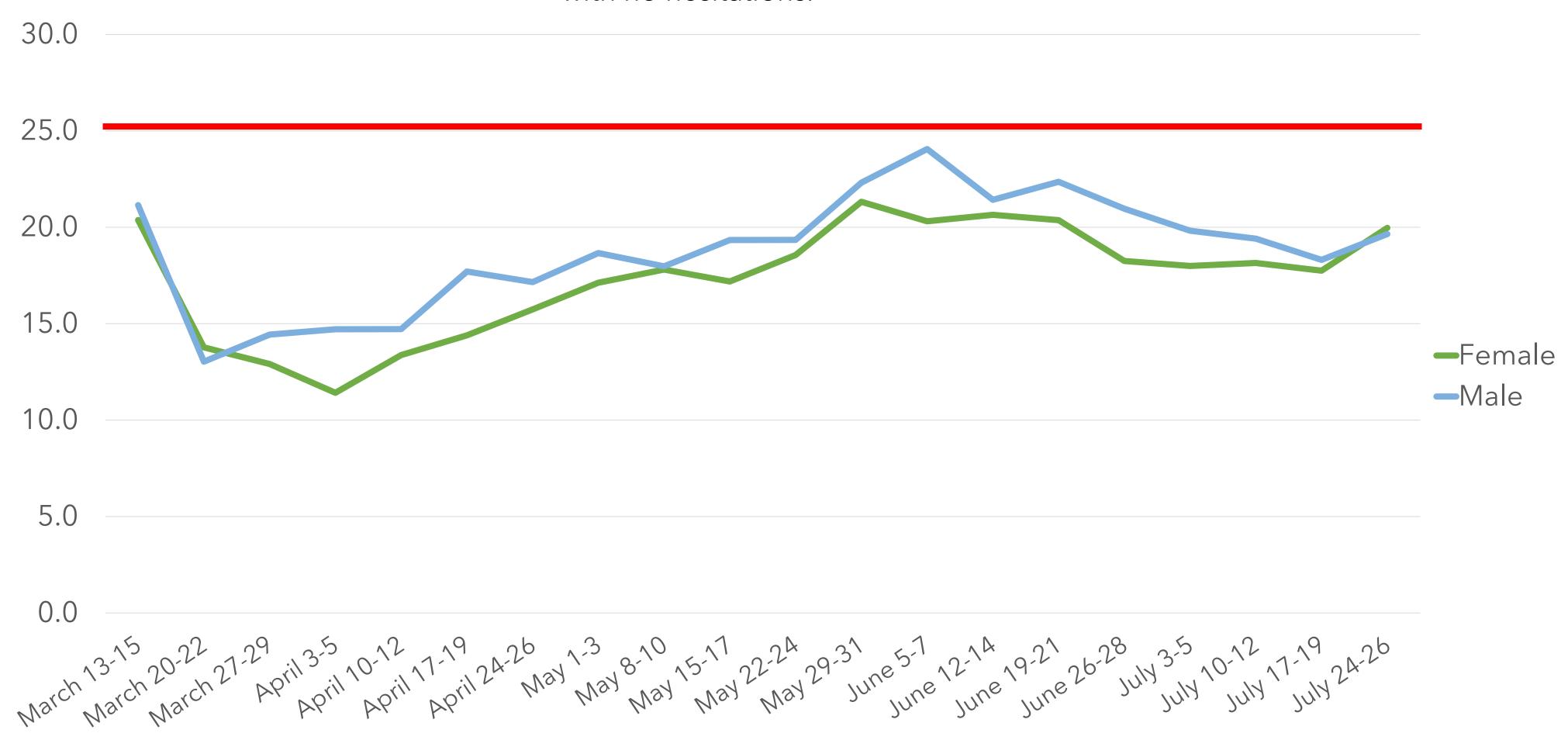
Travel Outlook





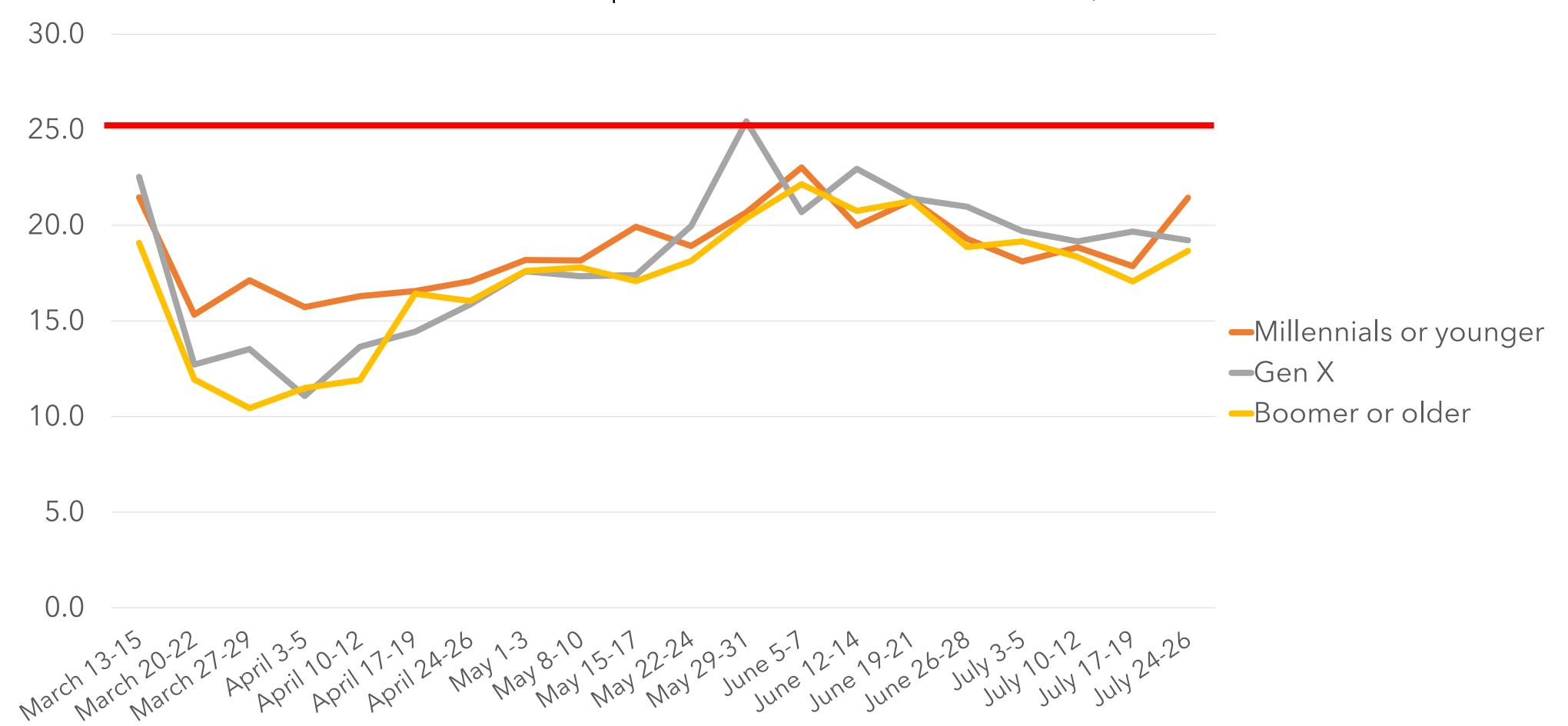
Gender

- Both Men and Women show increased sentiment this week.
- However, safety concerns showed little movement for both Men and Women this week.
- This week 47.2 percent of Women reported they have no plans to travel in 2020 (down from 49.3% last week).
- One-in-five Men this week (22.4%) said they are already traveling or ready to travel with no hesitations.



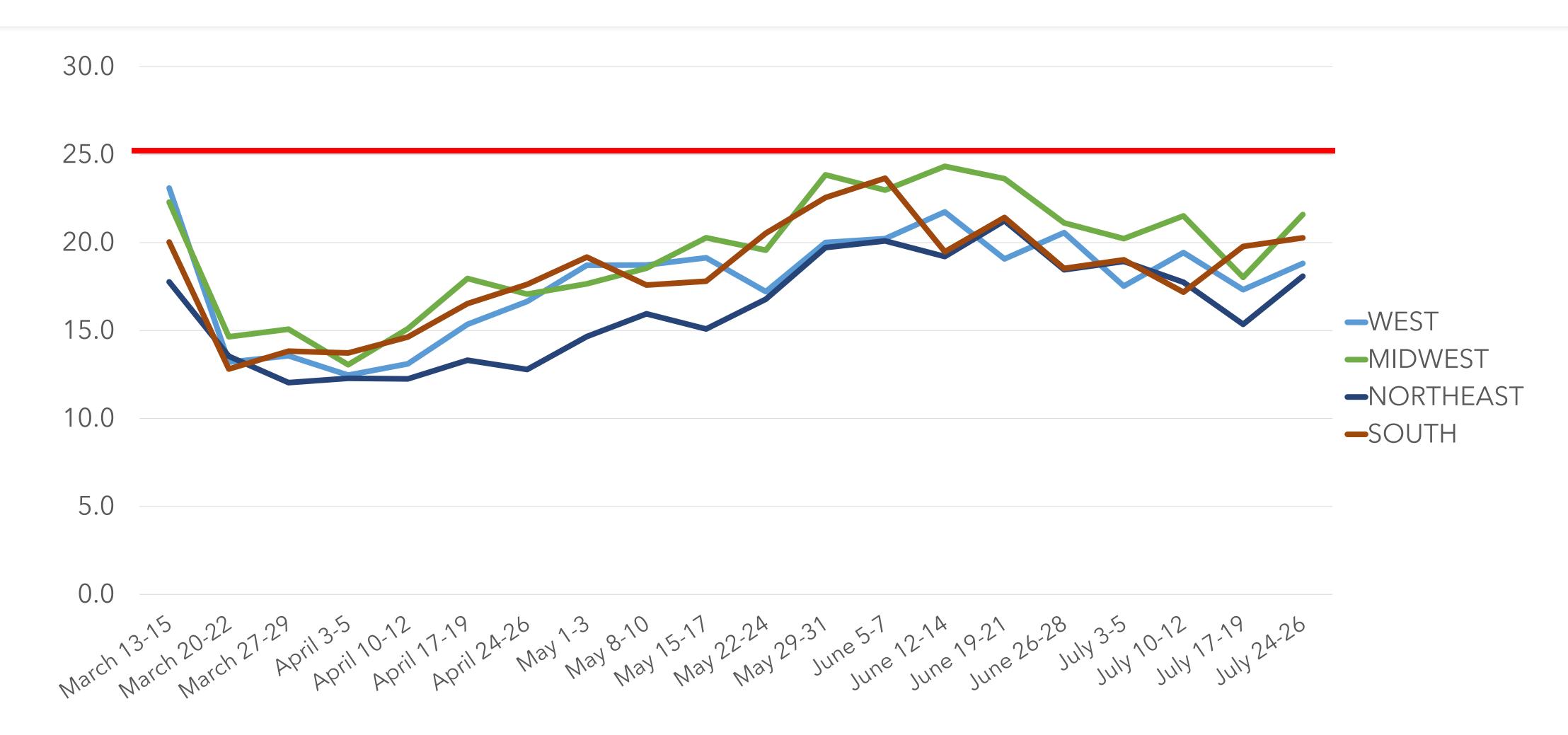
Generation

- Millennials indexed higher than the other generations this week, indexing nearly as high as they did in early June.
- Gen X showed a slight increase in safety concerns this week compared to the other generations.
- Over a third of Millennials (35.6%) reported they would be Happy or Very happy to see an ad promoting their community for travel (compared to a quarter or less of Gen X and Boomers).



US Region

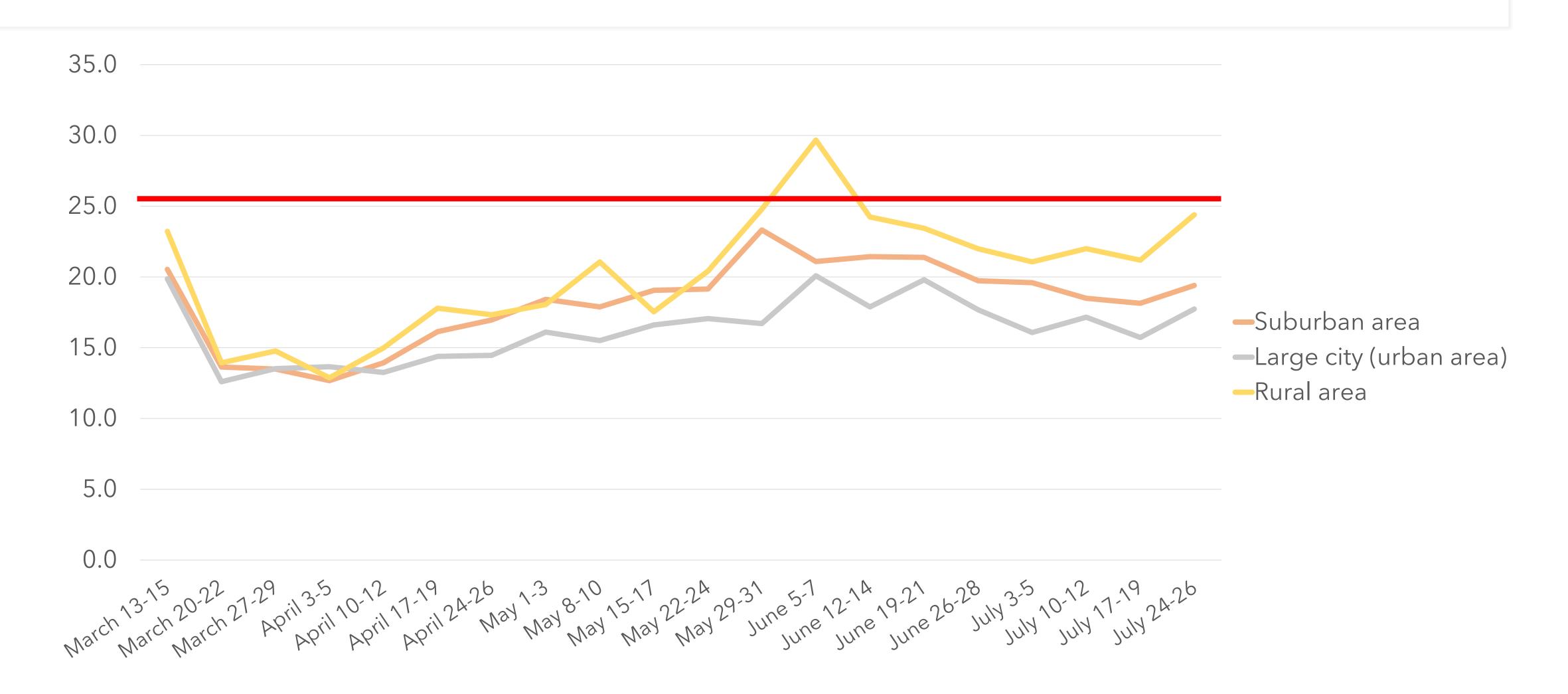
- The Midwest indexed highest amongst US regions this week and all regions are showing at least some sentiment improvement.
- The Midwest and Northeast regions showed slight decreases in safety concerns this week while the other regions showed increases.
- The Midwest and South regions expressed more excitement for travel and openness for travel messaging again this week than the other US regions.



Type Of Residence

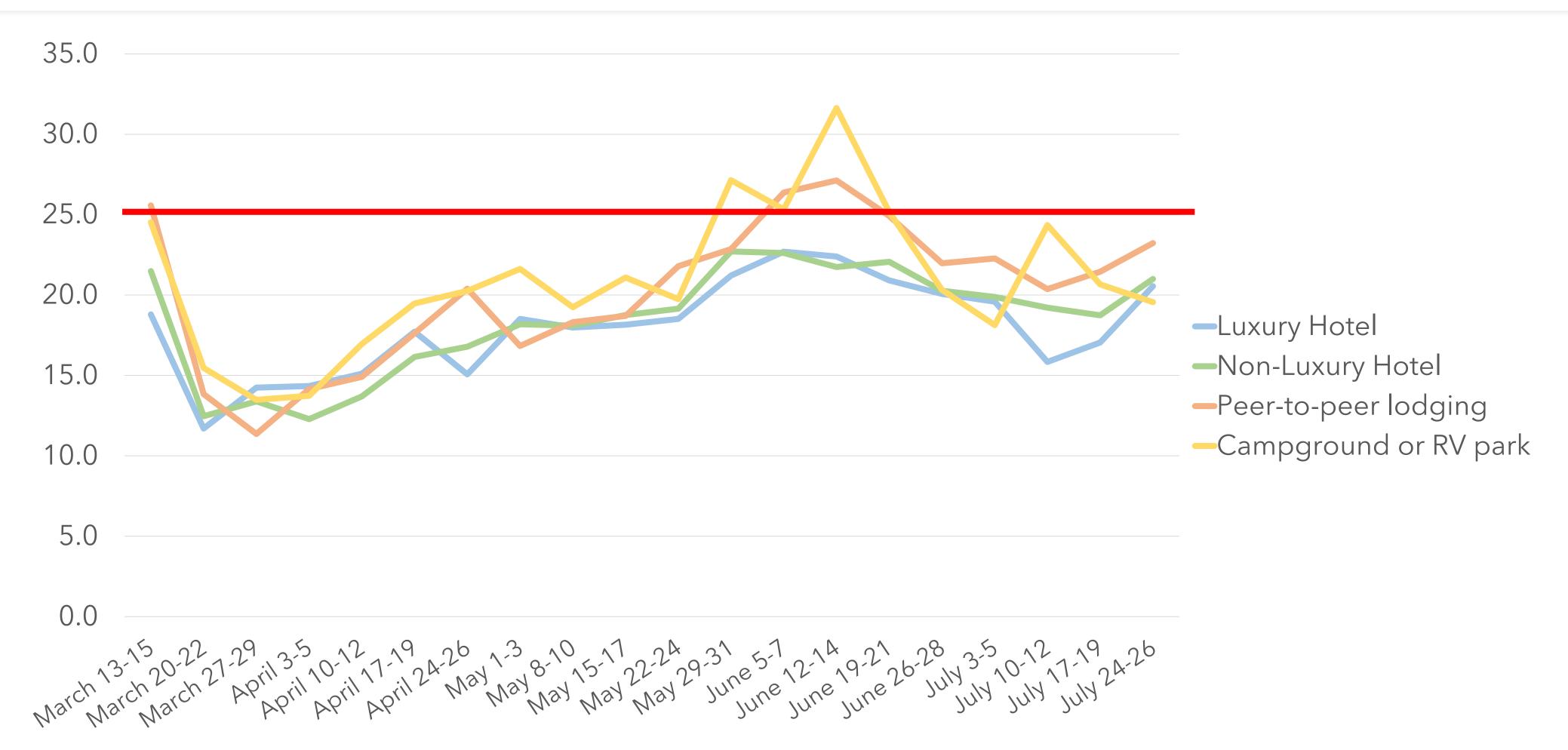
Points of Interest Impacting Index Scores:

- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural respondents reported decreased safety concerns this week.
- Large city Urban respondents were the most likely to say they'd traveled on a commercial airline in the past two months (19.8% compared to less than 10% for Suburban and Rural respondents).



Lodging Type Used in last 2 years

- Peer-to-peer respondents indexed highest amongst lodging types this week.
- Luxury Hotel respondents reported decreased safety concerns this week.
- Luxury Hotel respondents were the most likely this week to say Luxury or 5-star hotels would be the safest lodging option in the next six months (76.1% compared to around 50% or less for other respondents).





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

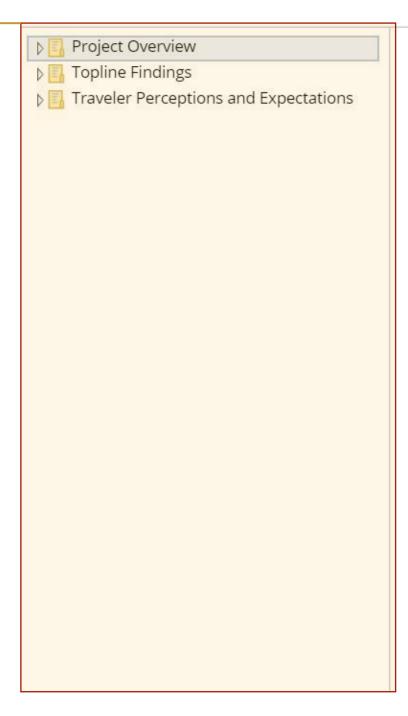
Guidelines on viewing, segmenting and exporting data from the dashboard.

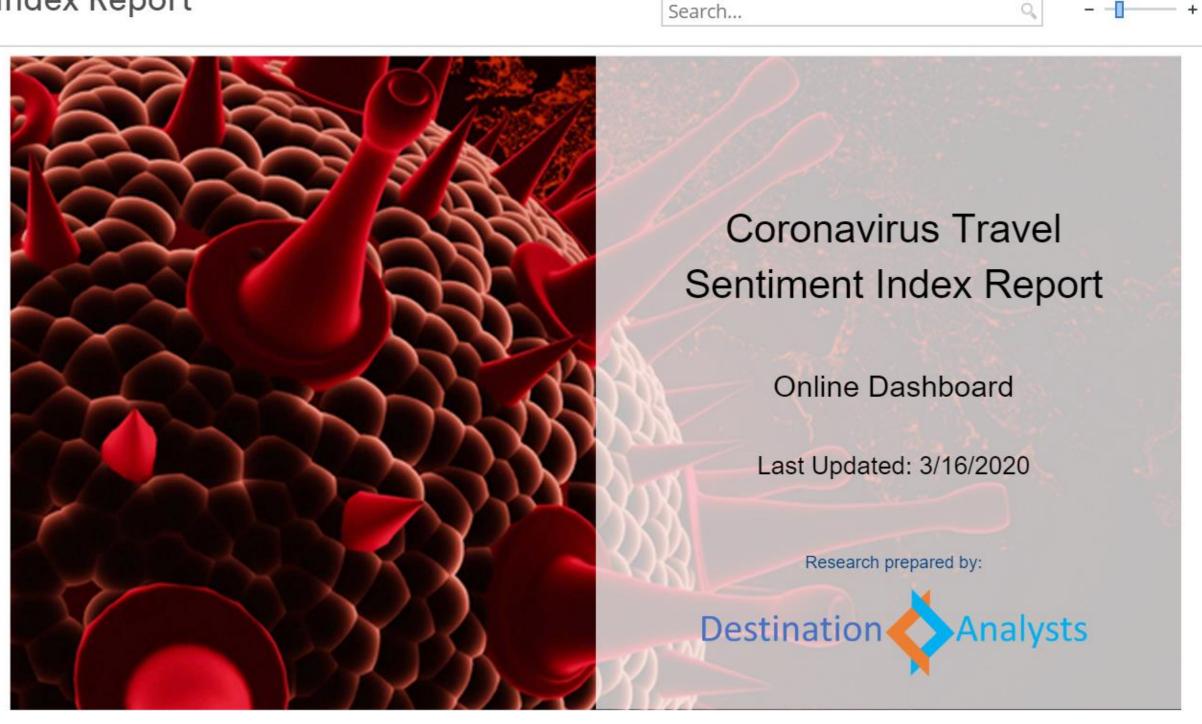


NAVIGATING THE DASHBOARD:

Coronavirus Travel Sentiment Index Report

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



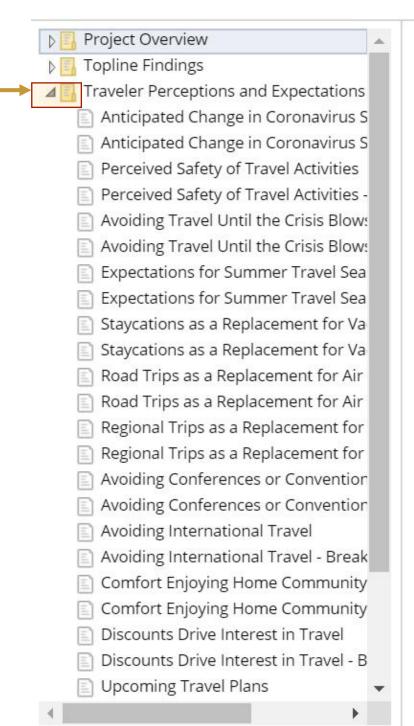


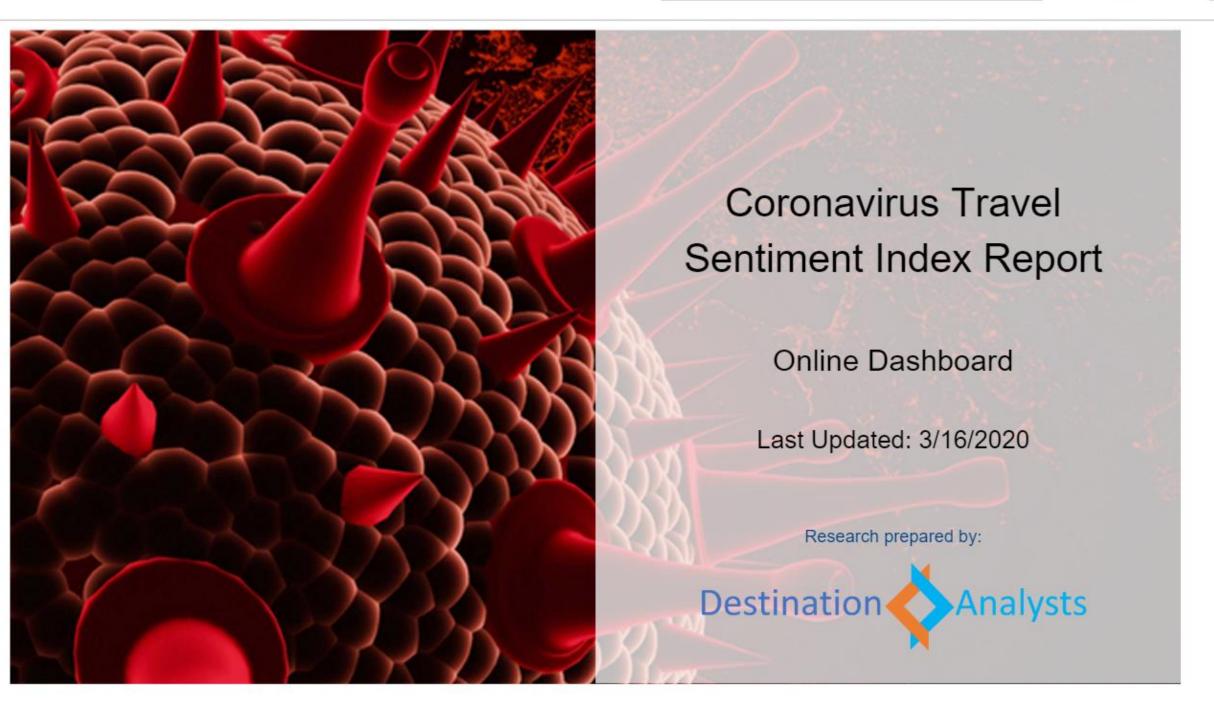
NAVIGATING THE REPORT:

Coronavirus Travel Sentiment Index 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.



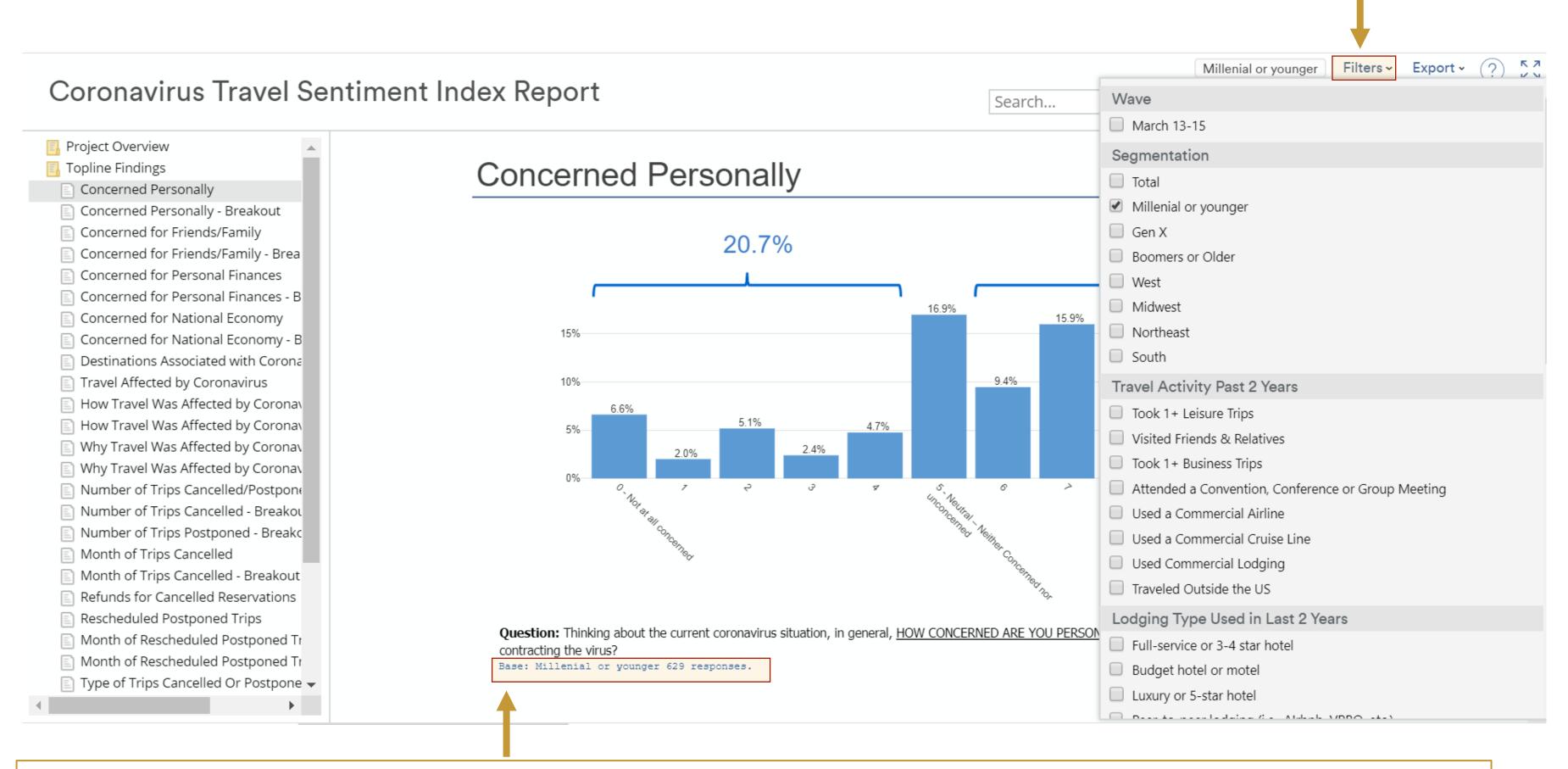


Search...

FILTERING THE REPORT:

To segment the results by a specific group (generational, geographical, etc.)

Click on "Filters" in the top right corner.

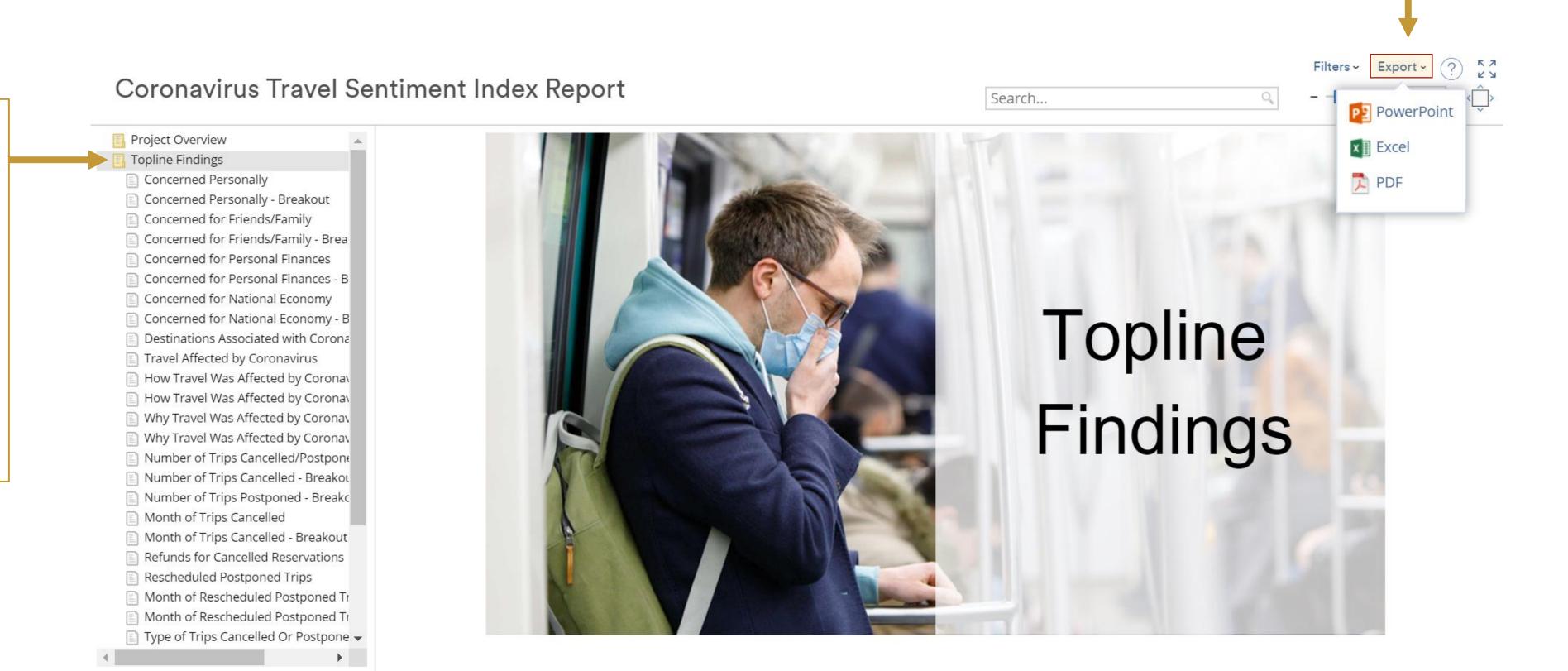


IMPORTANT NOTE: When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

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"

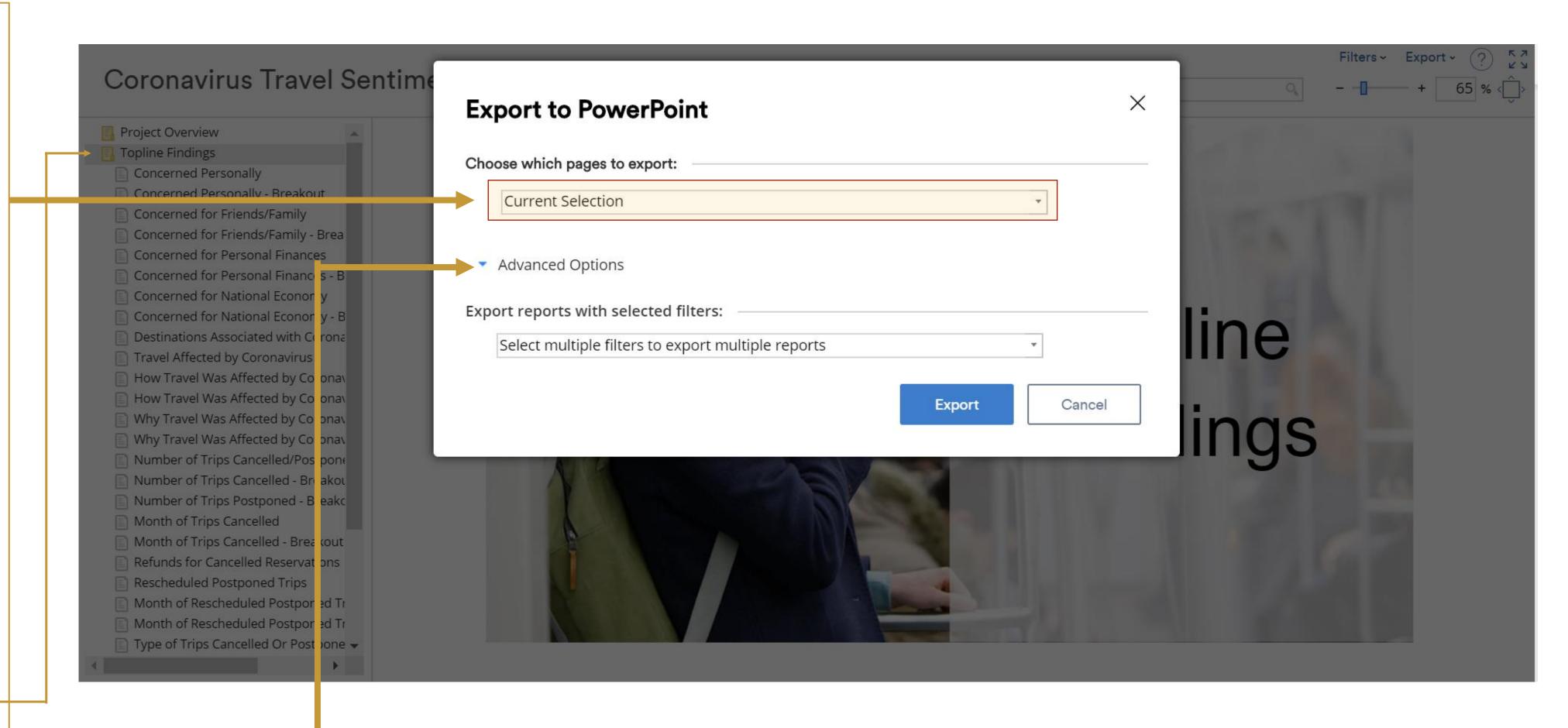


EXPORTING THE DATA:

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

