

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 2

RESEARCH FINDINGS

March 23, 2020

Destination  Analysts

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Project Overview

The COVID-19 outbreak has caused widespread disruption and damage to the travel and tourism industry. To benchmark and track the current situation, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the second wave of this project are presented in this report. The survey will be 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 second wave of this survey was collected from March 20-22, 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, 1,200 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



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Project Overview

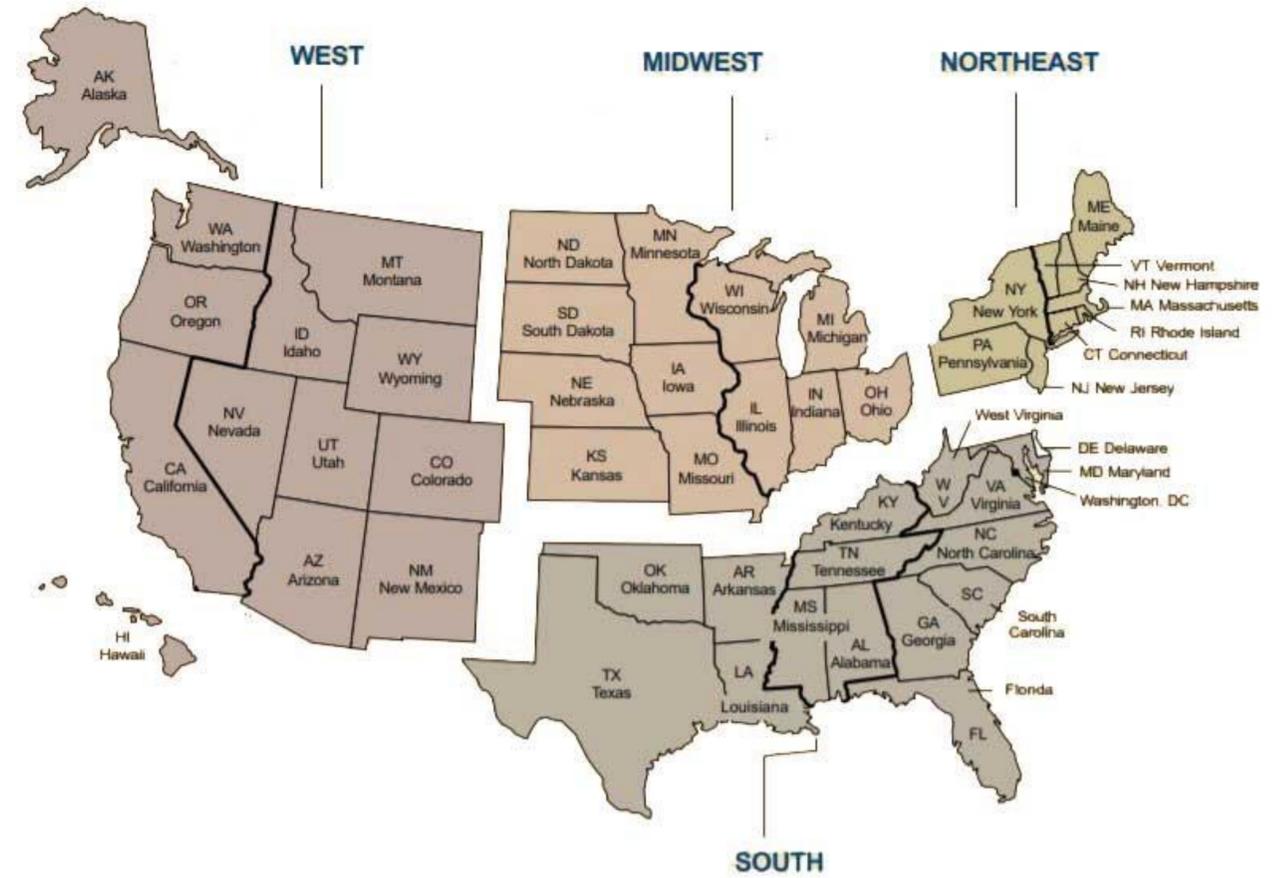
Data weighting. The survey sampling plan used in this project collected 300 fully-completed surveys in each of the four regions shown in the map at right. The overall results presented in this report are weighted to reflect the actual populations of the regions.

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 for at least the next month, and likely further into the future. Subsequent reports will be released on the following weekly schedule.

	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

* The supplemental survey of Meeting & Event Planners will be released soon.

Map of U.S. Showing Survey Regions



Key Findings

The second wave of this consumer sentiment project continues to examine benchmarks set forth in the first survey wave with the intent to track evolving traveler sentiment around the COVID-19 pandemic. The following key finding emerged:

- **It's getting real.** Concern amongst travelers about personally contracting the Coronavirus increased this week. 71.6 percent of survey respondents now say they have some level of concern about contracting the virus. 21.3 percent are extremely concerned. Still, American travelers continue to be somewhat more concerned about the health of their friends and family than themselves, with 79.7 percent expressing concern for the safety of their loved ones, up from 70.8 percent last week.
- **Economics concerns rise.** Now, 70.2 percent of American travelers are concerned that the pandemic will impact their personal finances. This is up from 62.0 percent last week. National economic concerns are growing more pressing. Nearly 9-of-10 travelers expressed some level of concern for the national economy.



Key Findings



- **A heightened sense of danger.** As was the case last week, cruise and foreign travel are seen as the most dangerous travel activities. Attending a convention or conference is seen as “Somewhat unsafe” by 23.0 percent and “Very unsafe” by 56.9 percent of travelers. Across the board, all travel activities are seen as less safe than they were even one week ago. When asked to state the one word that best describes how they feel right now about travel, words related to fear (scared, unsafe, cautious, danger, nervous, etc.) were the most common answers.
- **The impact grows.** This week, the proportion of American travelers who reported having their travels impacted by the Coronavirus surged to 64.3 percent. A shift from postponing trips to canceling trips appeared this week. 63.0 percent of travelers said they had canceled a trip, compared to only 55.1 percent last week. Postponements were down this week.
- **Safety is key.** This week, concerns about personal safety became the top reason expressed for why Americans have changed their travels, with 2-of-3 respondents (62.8%) citing it as a reason. Concerns about contracting the virus and passing it on dropped somewhat this week, while government restrictions grew sharply. See next page for detail.

Key Findings

- **Canceling short-term, some longer-term, too.** Most travel cancellations to date have been near-term bookings, but we note a small increase this wave in June and July trips being canceled. More travelers are getting refunded for canceled trips. This week, 60.9 percent report receiving full refunds, compared to 56.1 percent last week.
- **Are they being postponed or canceled?** 3-of-4 of postponed trips (74.1%) are actually not being rescheduled. More than half of those rescheduling a trip are planning to take that trip in May or June. This week saw a big jump in the proportion of travelers saying they had rescheduled to May, up to 26.9 percent from 13.4 percent last week. Cancellations of vacations and weekend trips seemed to have jumped this week, with more travelers saying they had canceled these trip types than one week earlier. This week there was little change in the types of destinations being canceled, with cities and urban areas still bearing much of the cancellation burden. Consistent with the trend of more cancellations rather than postponements, the proportion of travelers postponing each type of trip was down this week. Almost one third (31.8%) of those postponing or canceling a trip did so for a trip to a foreign country, down from 37.7 percent last week.



Key Findings



- **Things are expected to worsen.** This week, 2-of-3 travelers expect the Coronavirus situation to get worse in the next month. Last week, this figure stood at 61.5 percent. Now, 78.0 percent of American travelers say they are done traveling until the Coronavirus situation blows over. Last week, this figure stood at 61.1 percent.
- **Uncertainty abounds.** Last week about half of travelers (52.5%) believed the Coronavirus situation would resolve itself before summer. Now, only about 1-in-3 (37.5%) agree.
- **Summer staycations more likely.** The percent of Americans considering staycations rather than vacations this summer edged up this week. One week ago, 41.3 percent “Agreed” or “Strongly agreed” that they’d probably take a staycation rather than a vacation. The figure is now 47.3 percent.
- **Road trips unchanged.** Road trips may replace some air travel this year, with about one third of American travelers saying they may avoid airlines and travel by car instead. This metric changed very little week-over-week.

Key Findings

- **Region trips are more attractive.** Comparable to the week prior, 46.3 percent of American travelers “Agree” or “Strongly agree” that they’ll probably be taking more regional trips while avoiding long-haul trips.
- **Enthusiasm for attending meetings in the current environment has declined significantly.** Three of four travelers (75.2%) now say they will be unlikely to attend these events until the Coronavirus situation is over, up from 66.8 percent last week.
- **Interest in international travel has also declined significantly in just one week.** 4-in-5 American travelers (82.1%) said they’re unlikely to travel outside the U.S. until the Coronavirus situation is resolved.
- **Our own communities are now suspect.** Americans’ comfort in going out in their own communities to enjoy themselves tanked this week. Last week about half (50.8%) of American travelers said they felt comfortable doing this. Now less than one third (28.8%) agree.
- **Less interest in discounted travel product.** Price cuts and discounts as a way to stimulate travel have lost a little of their luster this week. In wave one of the survey 38.4 percent of Americans said they were to some degree interested in taking advantage of these offers. Now, 31.6 percent agree.



Key Findings

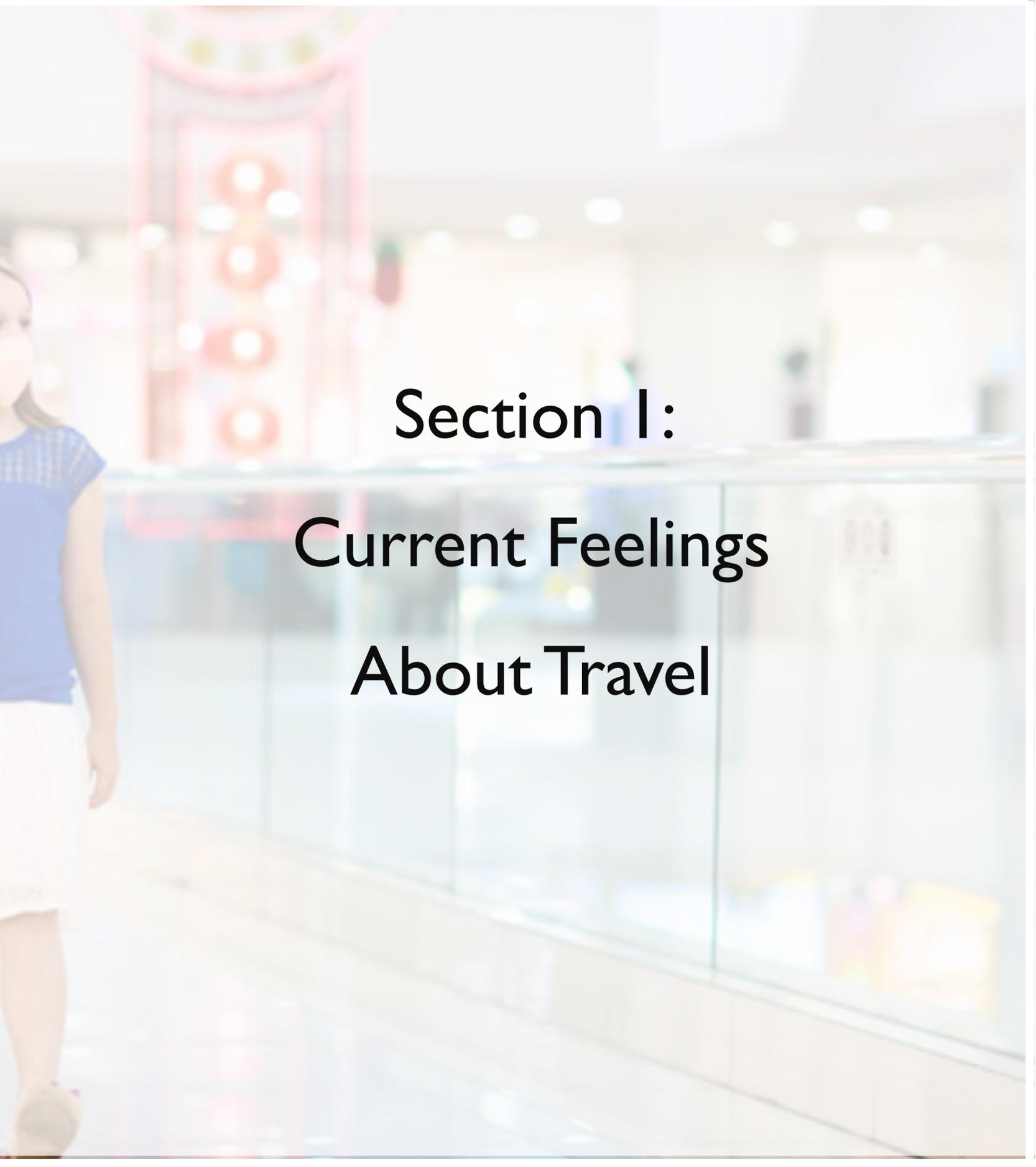


- Half of Americans (50.9%) feel that persons traveling now should feel ashamed. Interestingly, only 17.5 percent disagree.
- About half of American travelers (52.2%) say they have been taking action to try to support local businesses where they live.
- Half of employed American travelers (50.7%) say their employer has put travel restrictions into effect, up slightly from last week.
- Over a third of employed American travelers with employer-mandated restrictions (36.4%) say they will remain in place for at least a month.
- **Less planning? Less dreaming?** Travel expectations appear to have weakened somewhat in the past week. For almost all upcoming months, Americans were more likely last week than now to say they at least had tentative plans to travel. Travelers interest in learning about new travel experiences and destinations fell sharply this week. Last week, nearly half (49.0%) expressed some excitement about this topic, now only 29.5 percent feel similarly. Interest in even short trips with loved ones has fallen sharply this week. So much so that 1-in-4 American travelers said they wouldn't be at all excited to take a weekend getaway with a close friend or relative to a place they want to visit next month.

Key Findings

- **Traditional hotels still have a preference edge over home rental services like Airbnb.** However, the gap between the two is not huge. Almost one third of American travelers (30.3%) say they would generally prefer the home rental arrangement. Travelers who would prefer home rental accommodations say the primary reason is safety, meaning having less contact with other people. In contrast, those with a preference for hotels rated the physical security of the property as the top reason for their preference. A close second was having had past experiences with this type lodging.
- **Hotspot destinations.** The most talked about Coronavirus hotspots are New York, California, Washington, Seattle, Florida, San Francisco and Los Angeles. In the past week, New York has risen dramatically in this metric, from 55.8 percent to 75.8 percent.
- **The resources travelers say they would currently use to plan a trip illustrate the profound uncertainties they face.** The most commonly desired resource was the federal government. Word of mouth, typically the most relied on resource by travelers, was only selected by 18.8 percent of travelers.





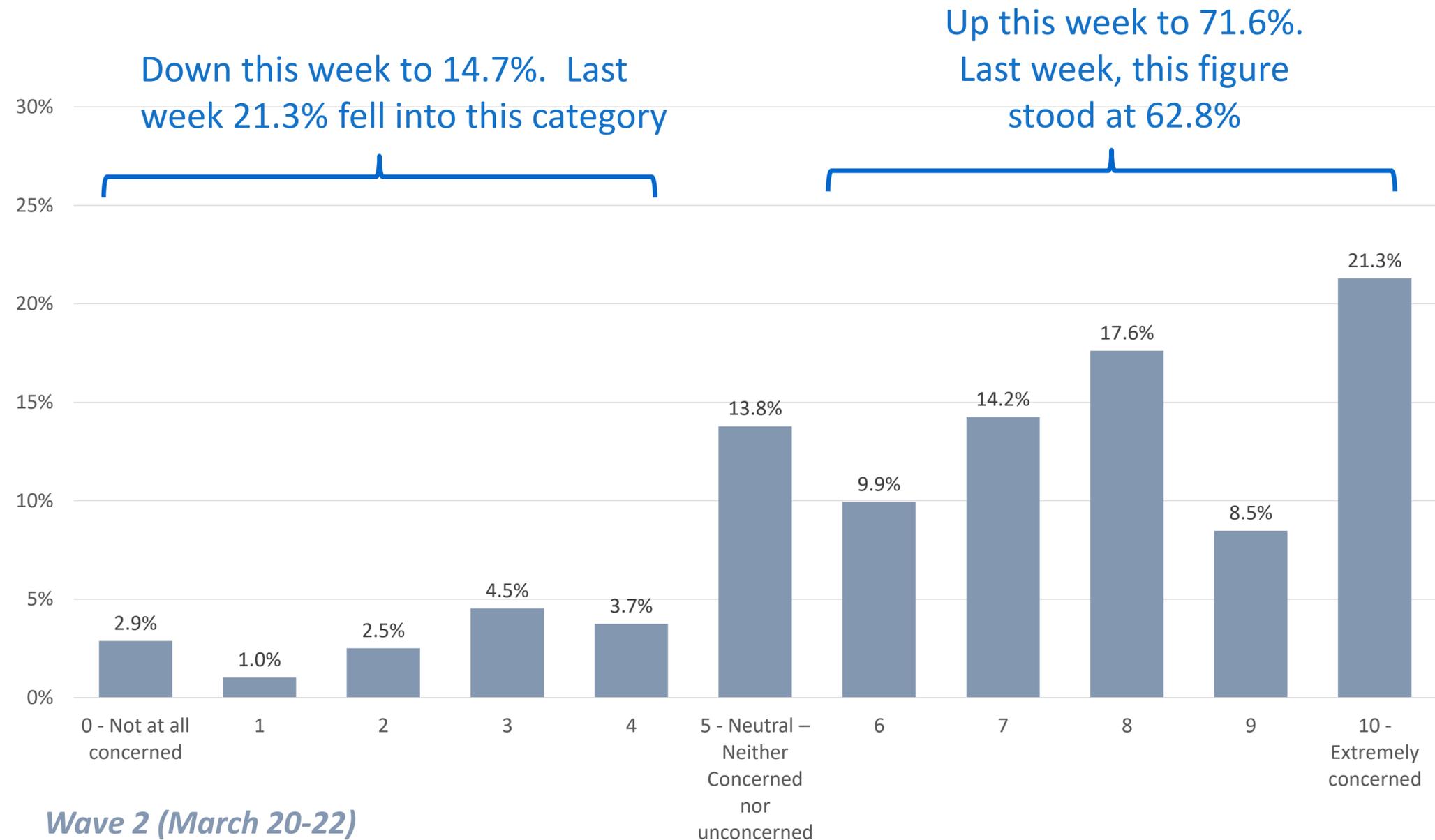
**Section I:
Current Feelings
About Travel**

Personal Health Concerns

Concern amongst travelers about personally contracting the Coronavirus has increased this week. In total, 71.6 percent of survey respondents now say they have some level of concern about contracting the virus. 21.3 percent are extremely concerned.

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 2 data. All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)

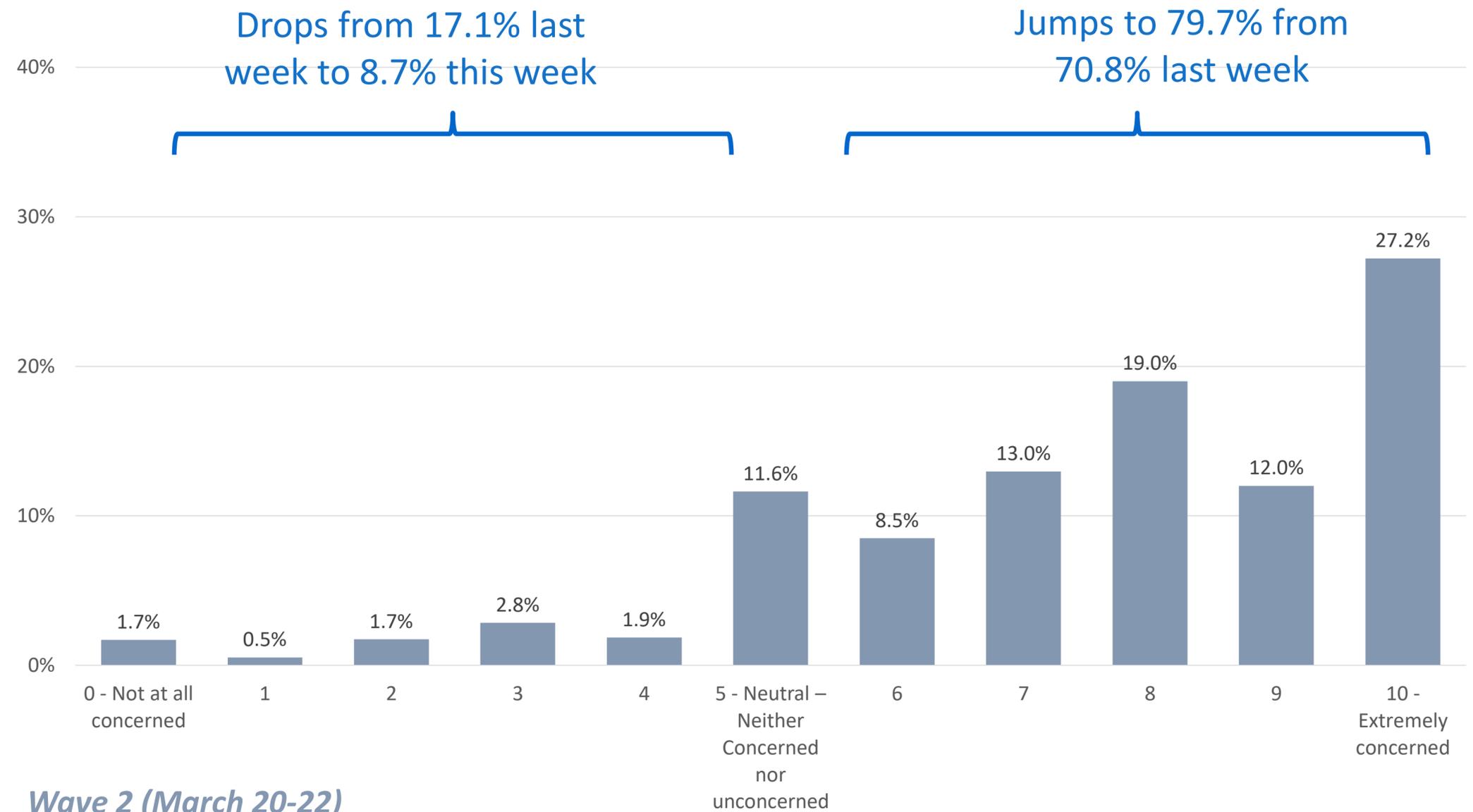


Health Concerns (Family & Friends)

American travelers continue to be somewhat more concerned about the health of their friends and family than themselves, with 79.7 percent expressing concern for the safety of their loved ones, up from 70.8 percent last week.

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)

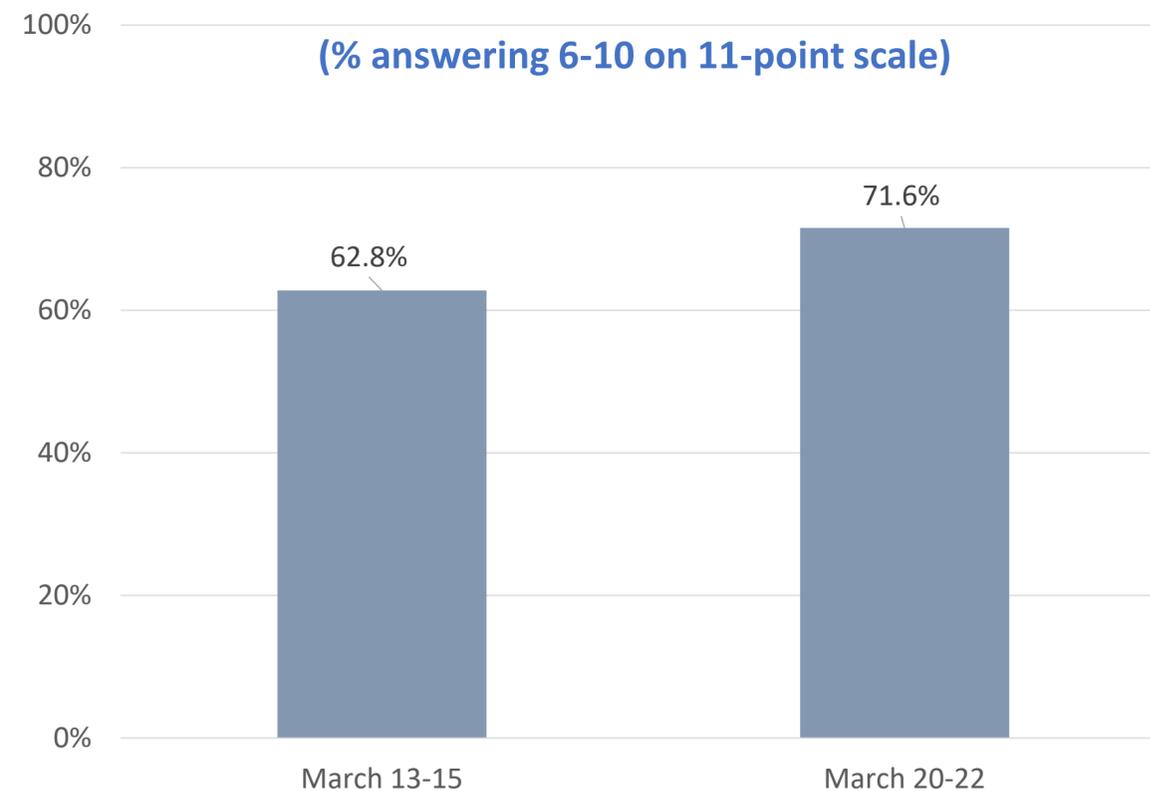
(Base: Wave 2 data. All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)



Summary: Safety Concern Metrics

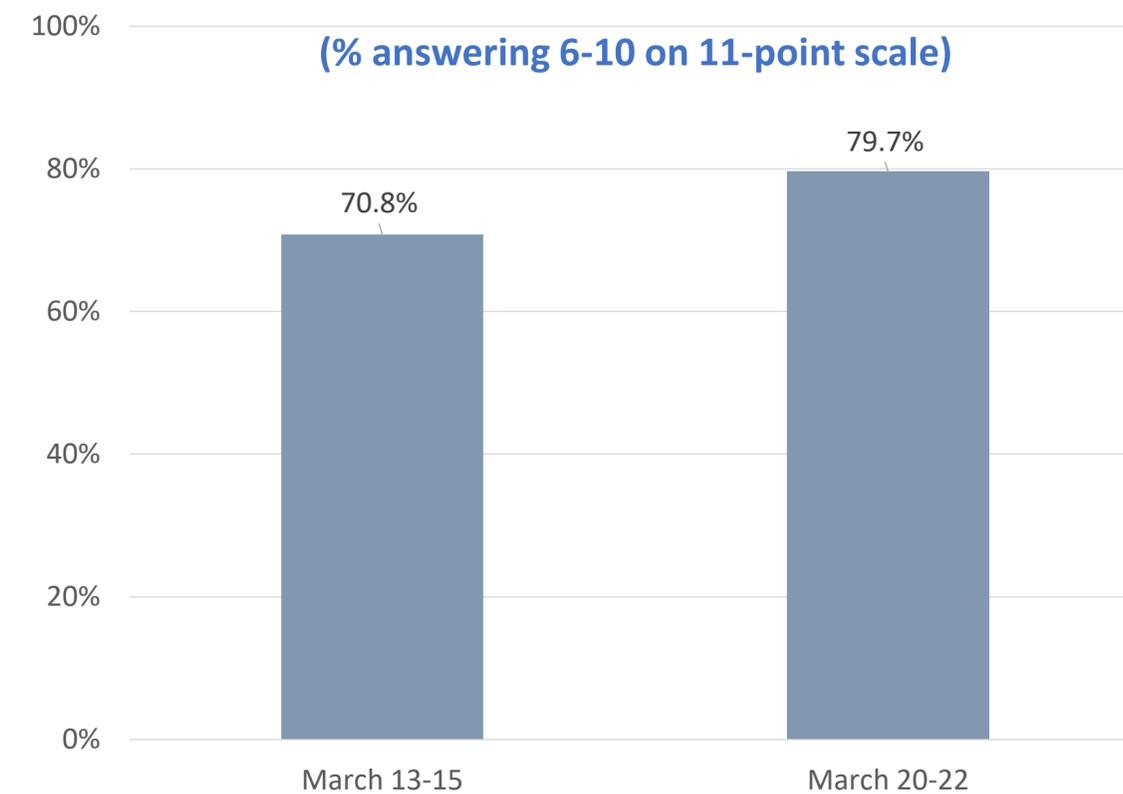
Summary charts for safety concern metrics are shown below. Both show significant increases this week.

Concern About Contracting Virus (Personally)



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

Concern About Loved Ones Contracting Virus



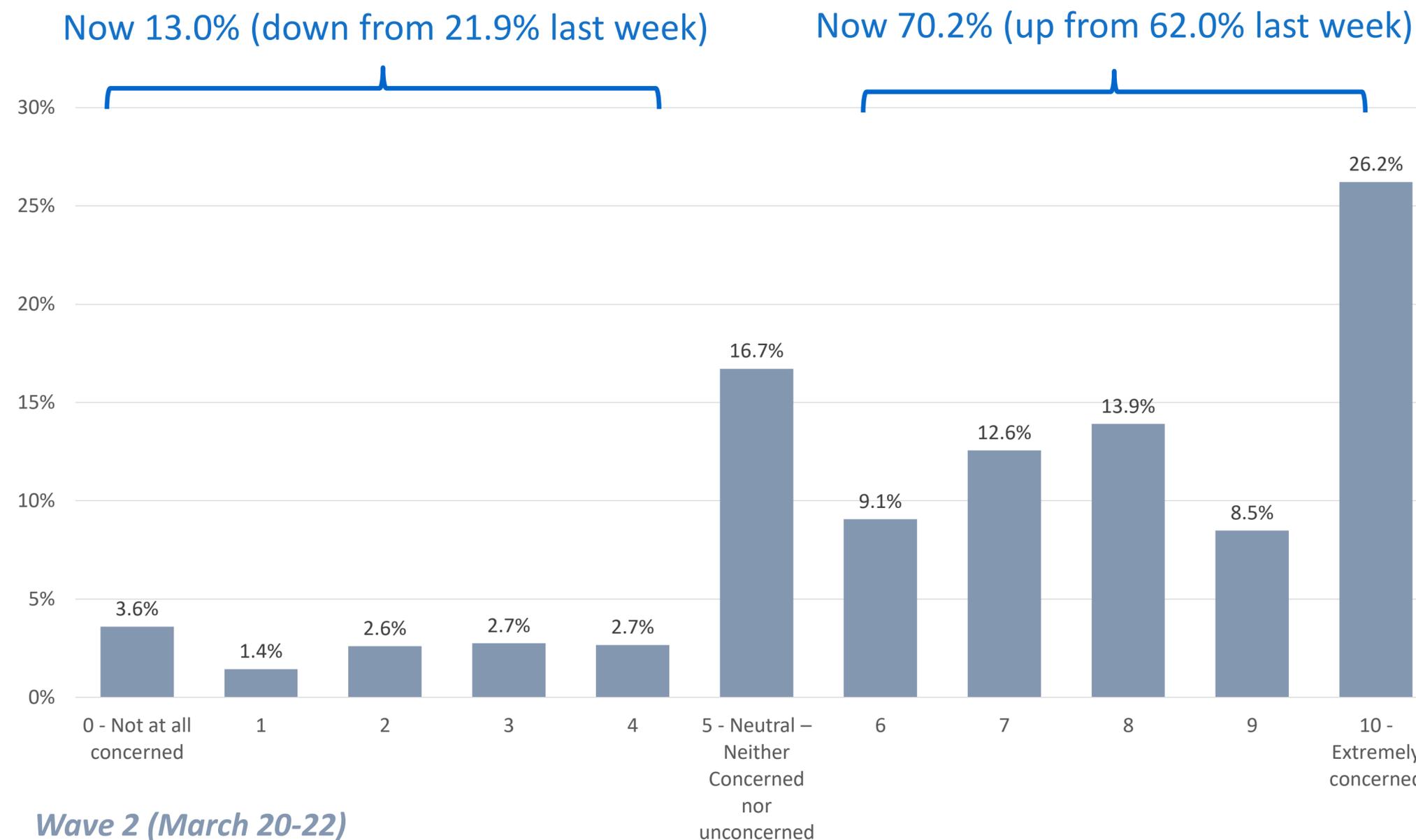
Question: Thinking about the current Coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

Concerns About Personal Finances

Now, **70.2 percent** of American travelers are concerned that the pandemic will impact their personal finances. This is up from 62.0 percent last week.

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 2 data. All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)

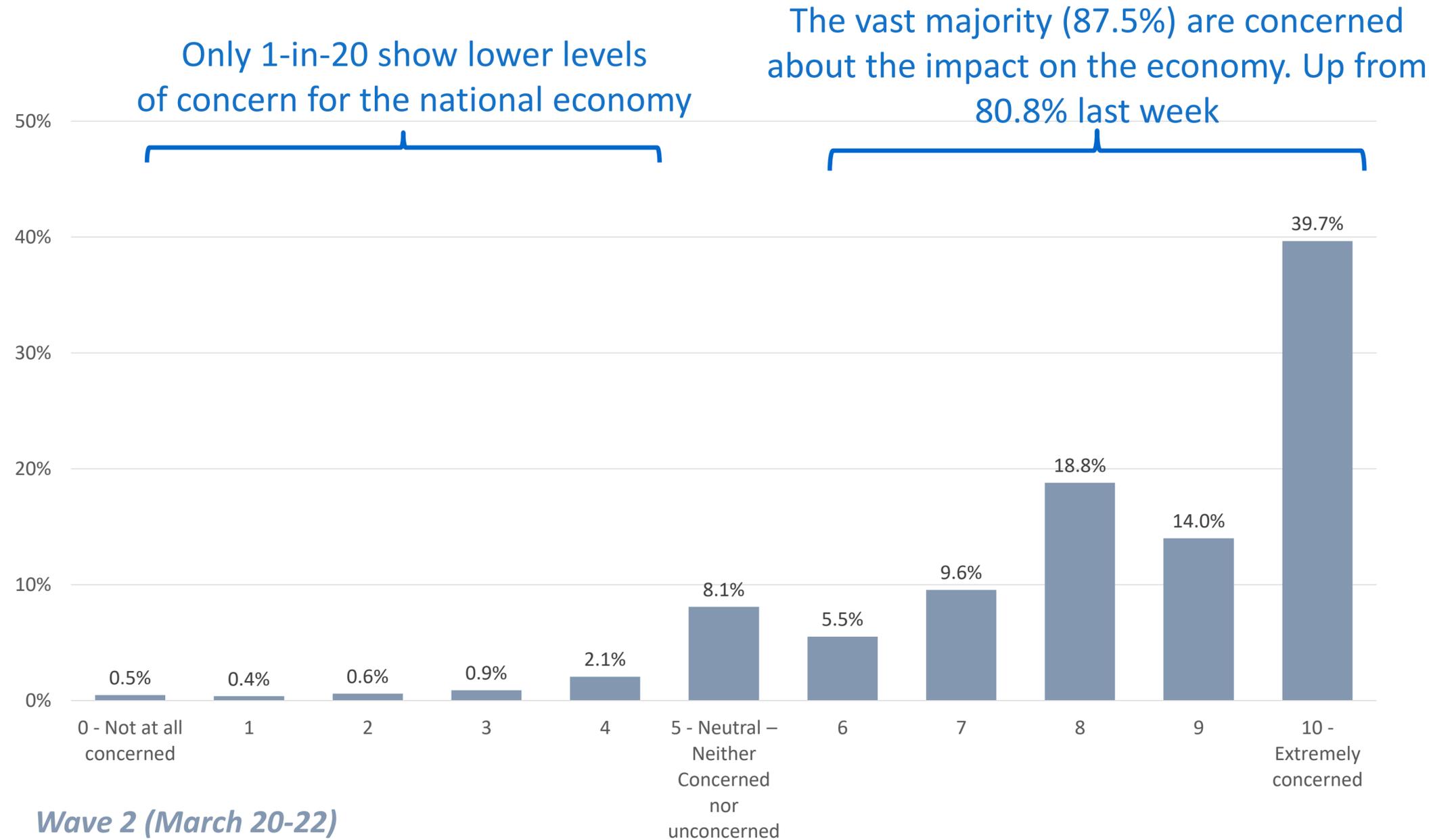


Concerns About National Economy

National economic concerns are growing more pressing. Nearly 9-of-10 travelers expressed some level of concern for the national economy.

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

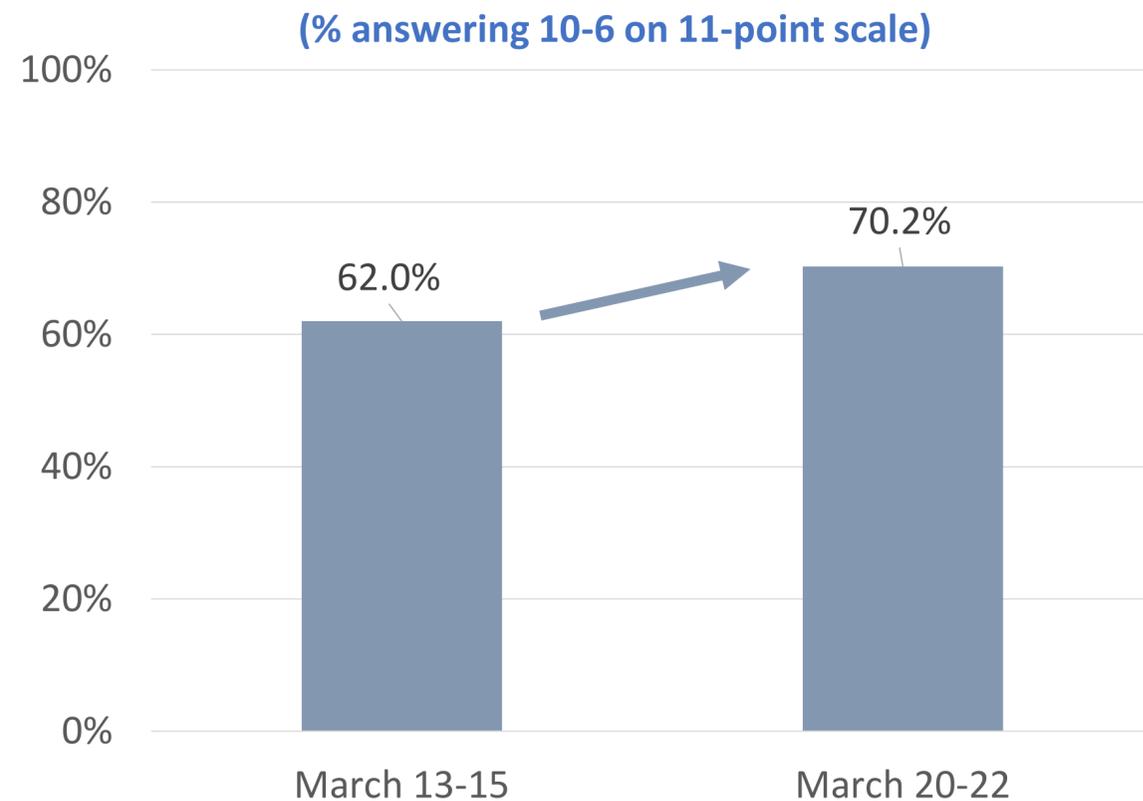
(Base: Wave 2 data. All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)



Summary: Economic Concern Metrics

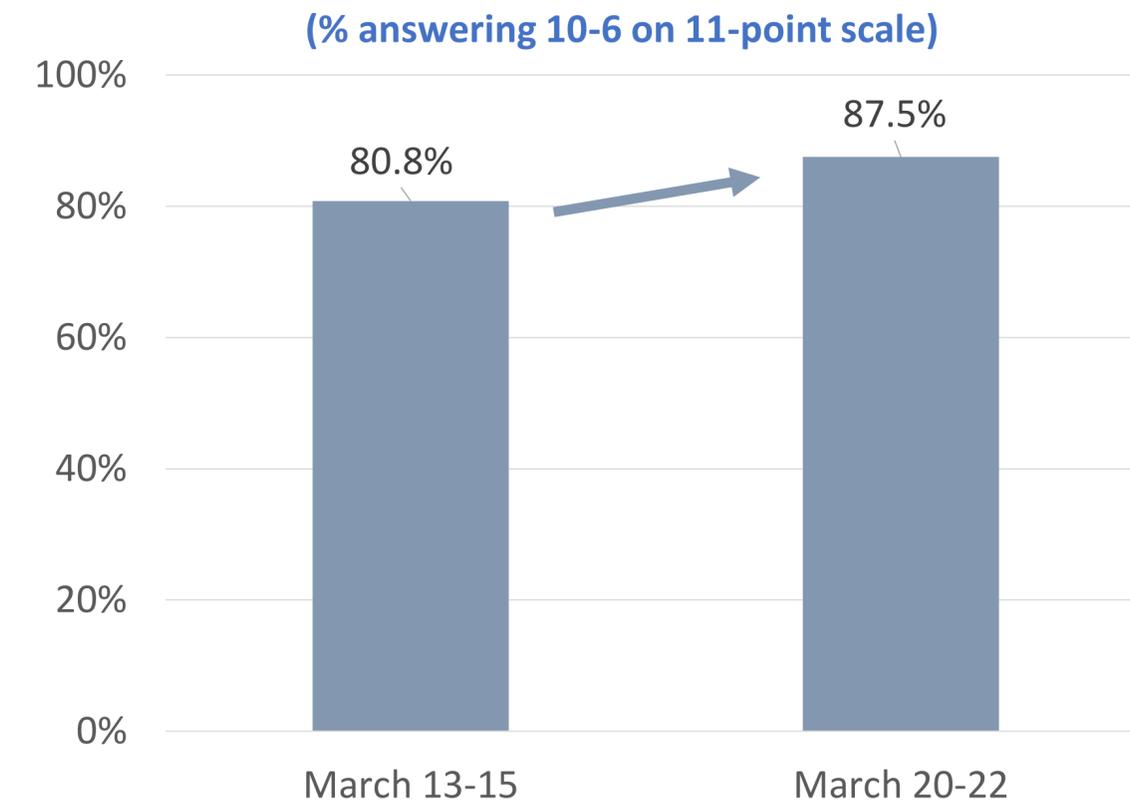
Summary charts for the two economic concern metrics are shown below. Both also show significant increases this week.

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)

National Economy



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

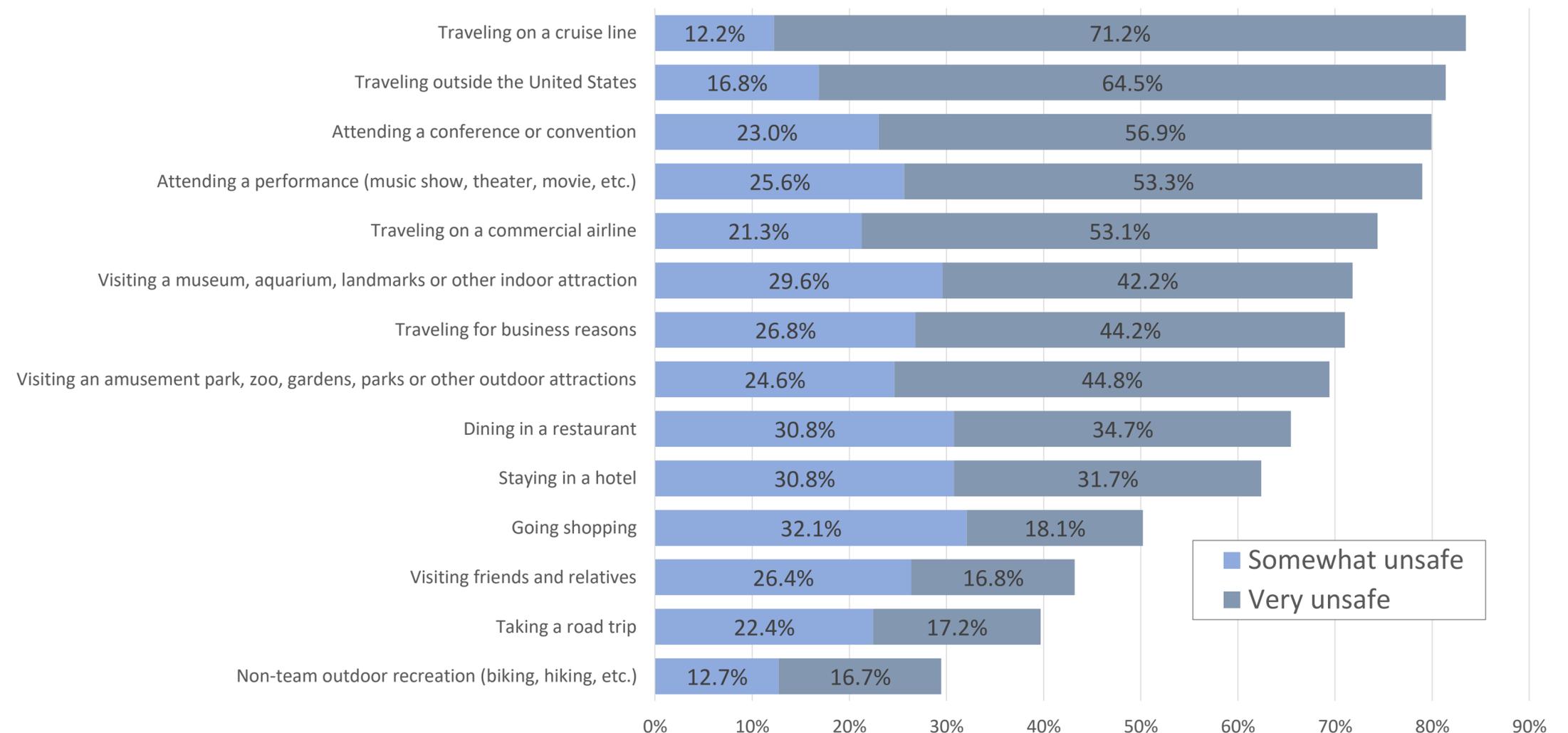
Perceived Safety of Travel Activities (Wave 2)

Similar to last week, cruise and foreign travel are seen as the most dangerous travel activities. Attending a convention or conference is seen as “Somewhat unsafe” by 23.0 percent and “Very unsafe” by 56.9 percent of travelers.

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

(Base: All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)

Wave 2 (Collected March 20-22)

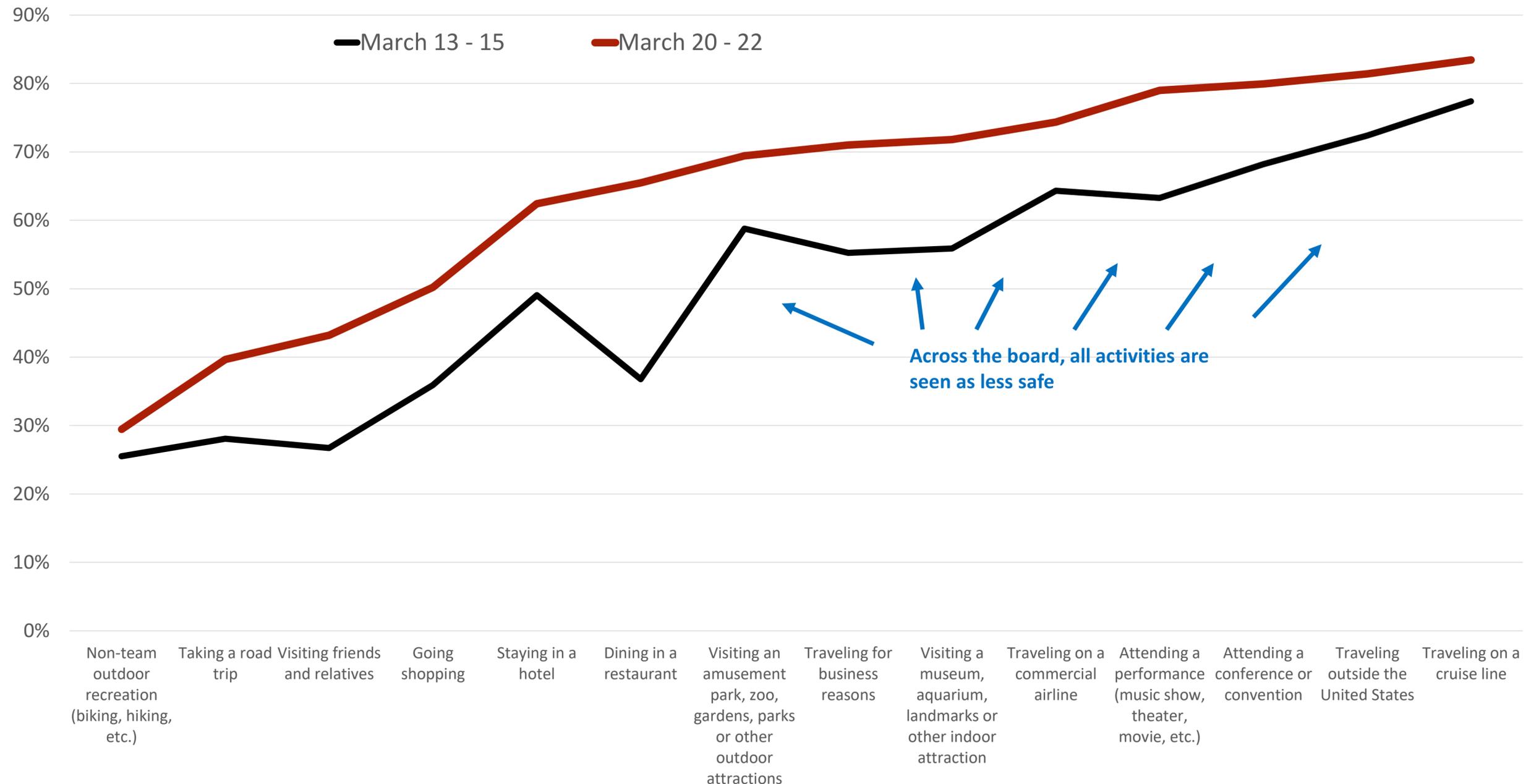


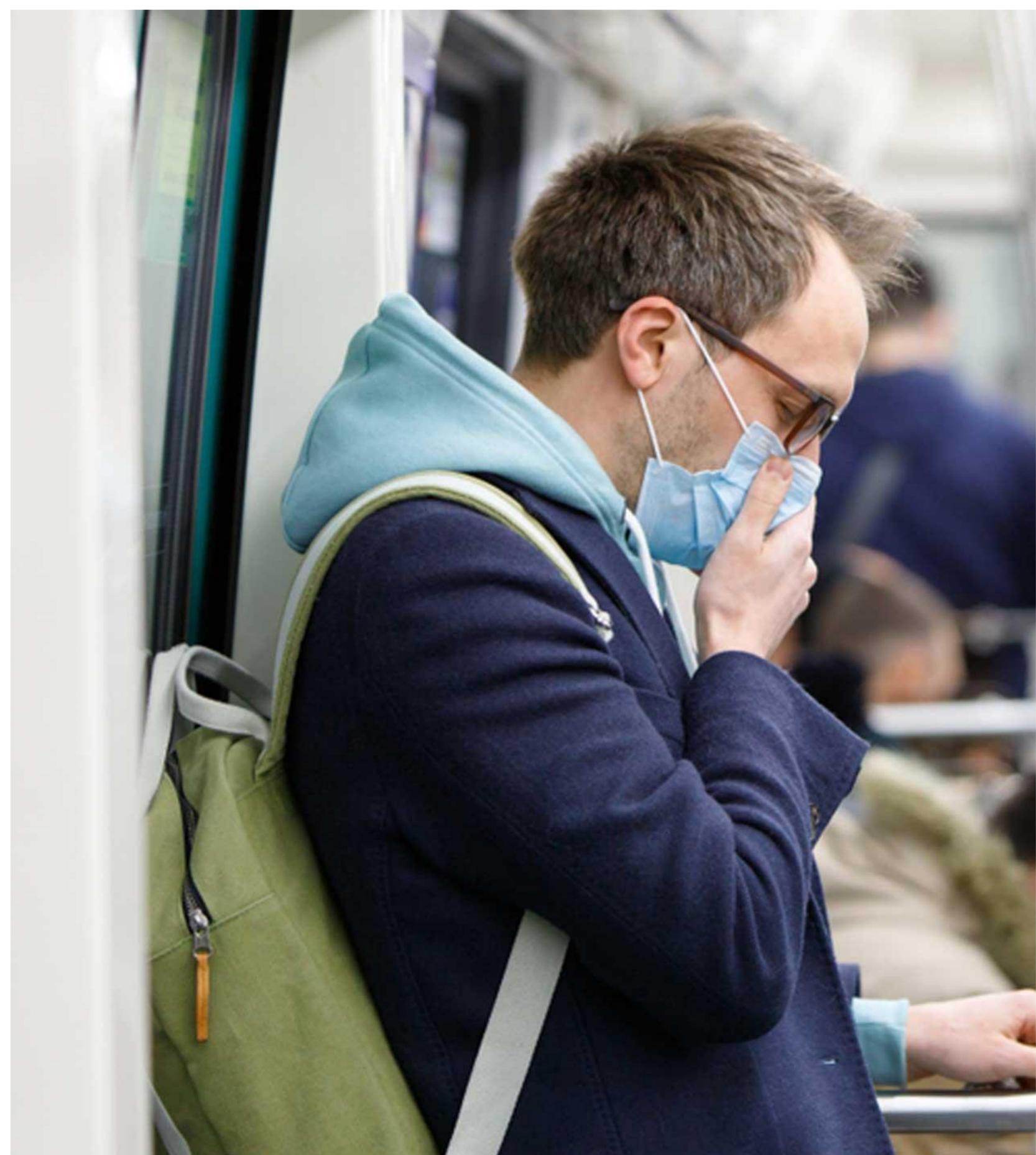
Perceived Safety of Travel Activities (Wave 1 vs. Wave 2)

Across the board, all travel activities are seen as less safe than they were even one week ago.

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

(Base: All respondents, 1,201 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)

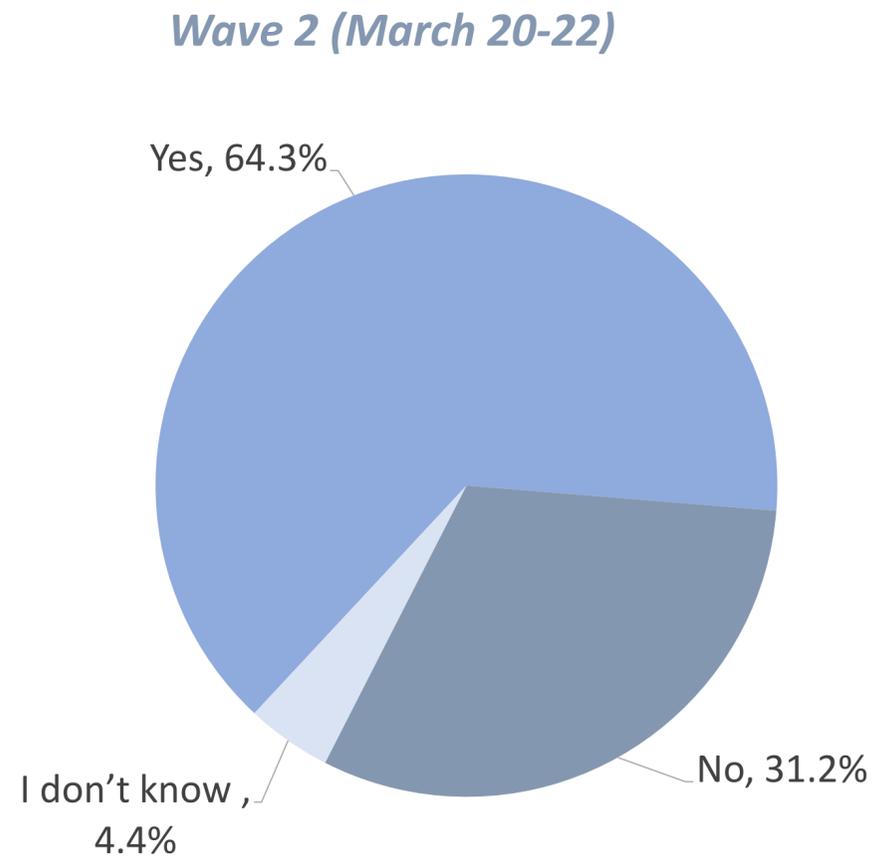




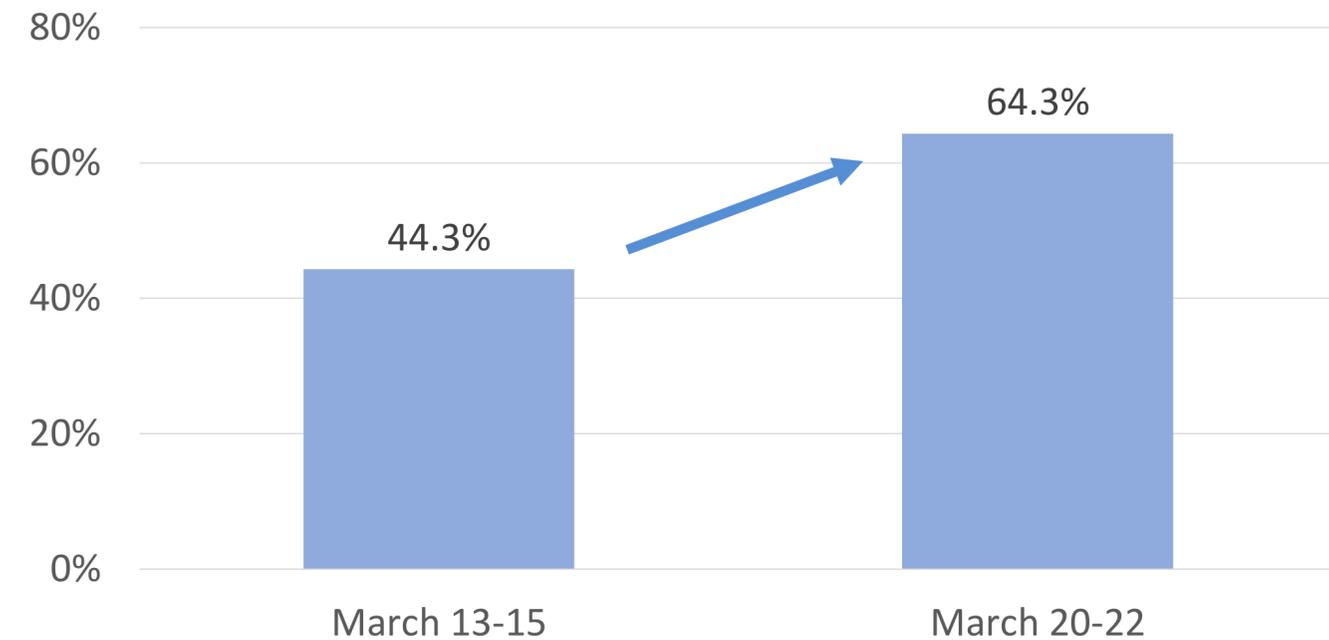
Section II: Impacts on Travel

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.)



This week, the proportion of American travelers who reported having their travels impacted by the Coronavirus surged to 64.3 percent.



(Base: All respondents, 1,201 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)

How the Coronavirus has Impacted Travel

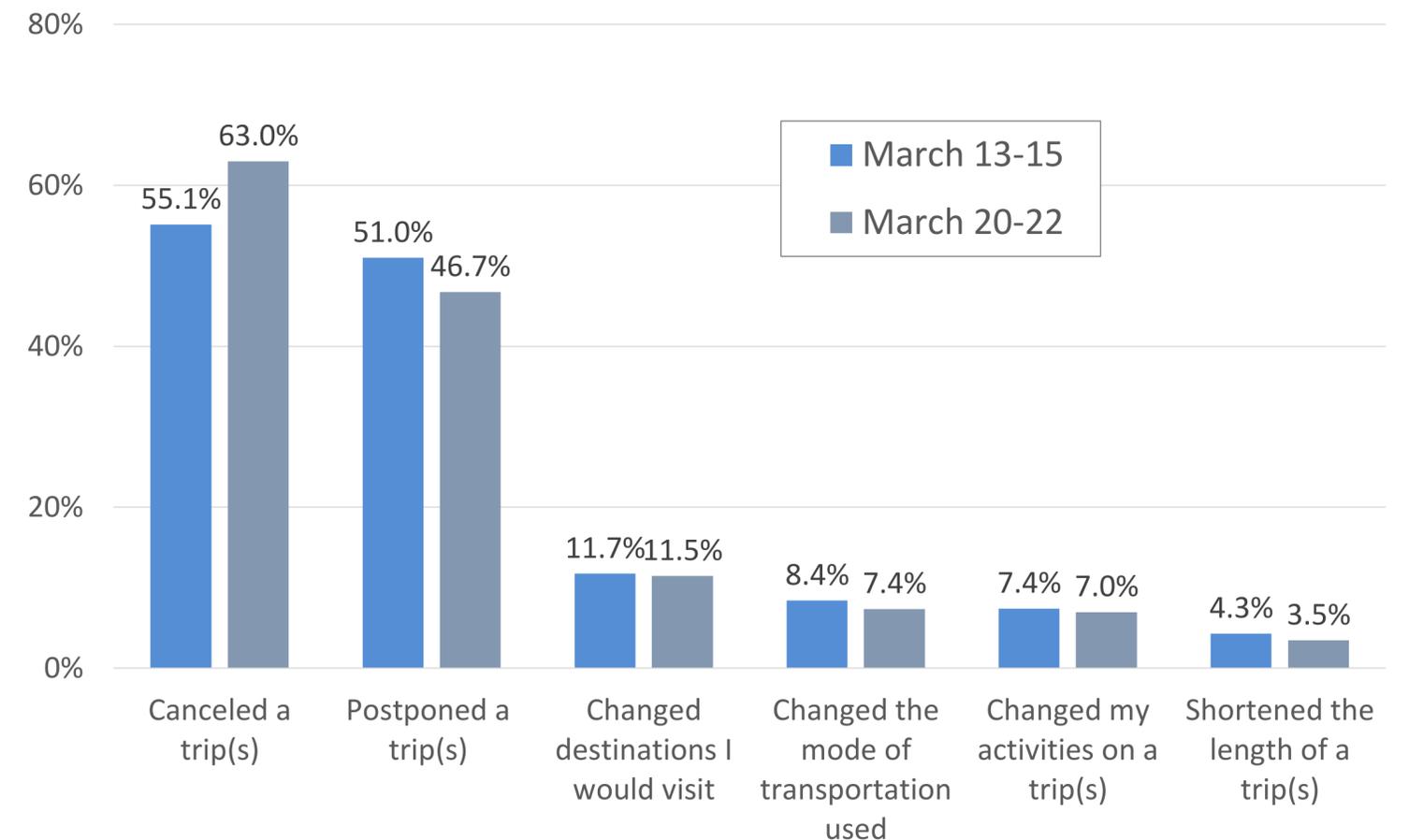
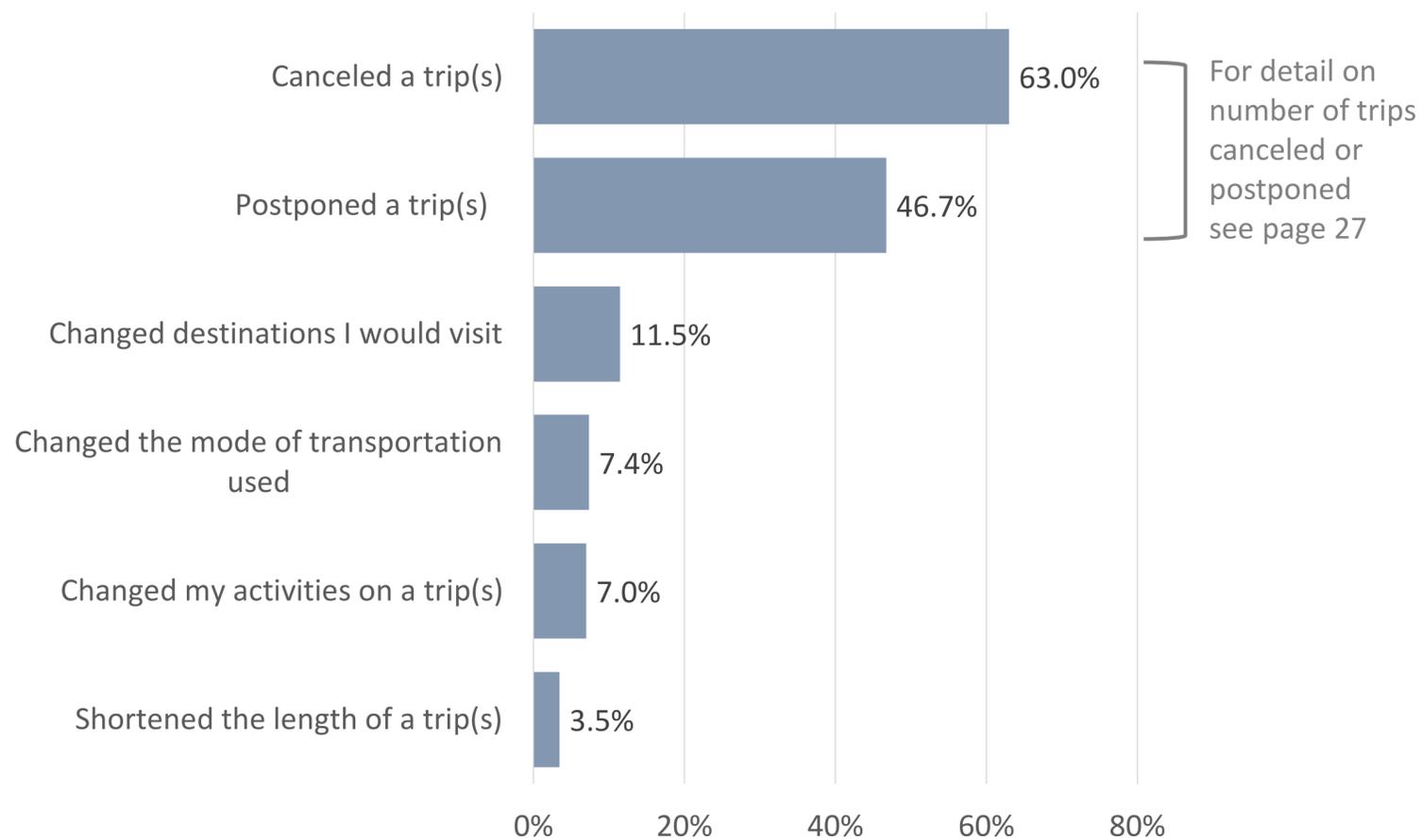
Question: How has the Coronavirus situation affected your travel? (Select all that apply)

Due to the Coronavirus situation, I have_____.

A shift from postponing trips to canceling trips appeared this week.

63.0 percent of travelers said they had canceled a trip, compared to only 55.1 percent last week. Postponements were down this week.

Wave 2 (March 20-22)



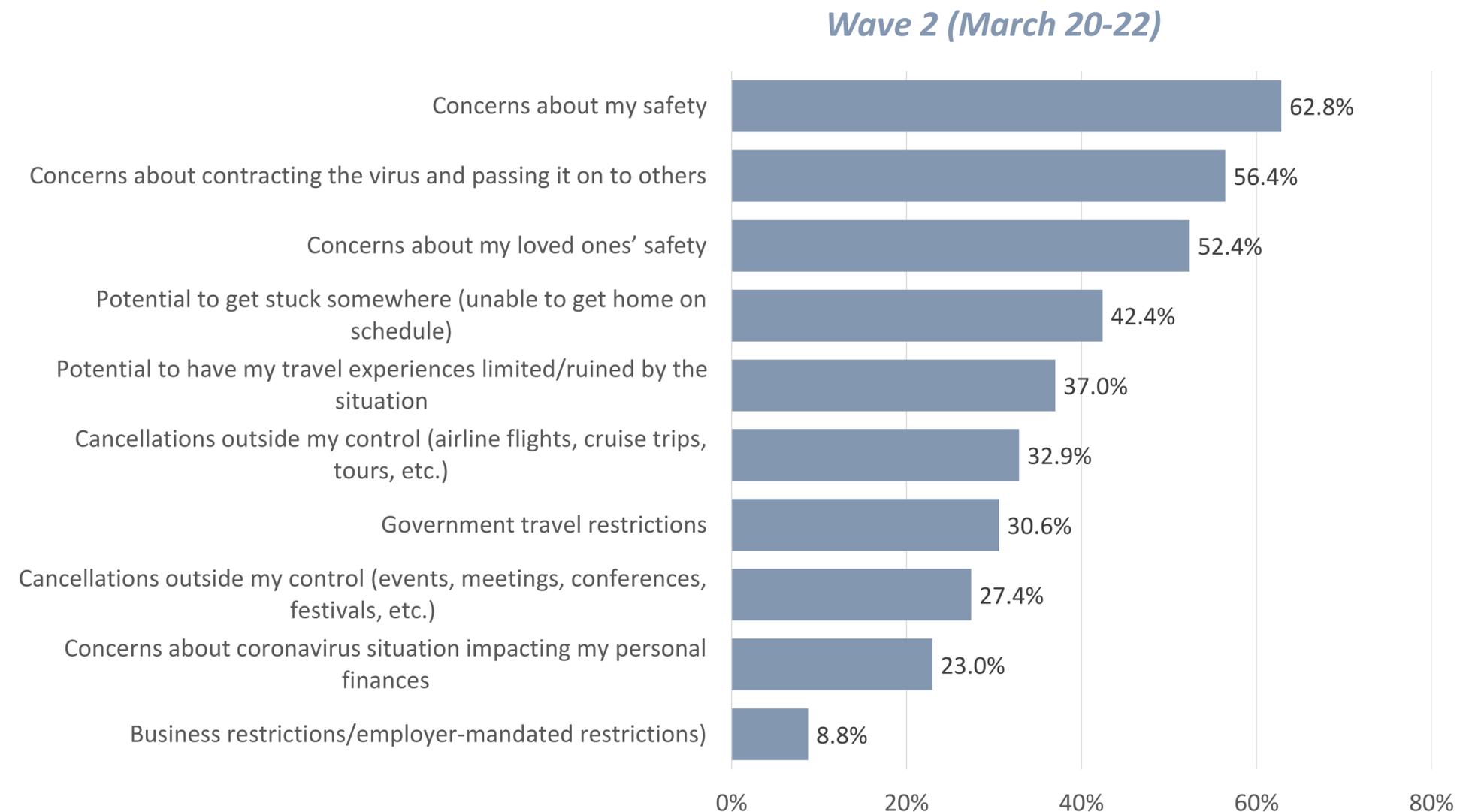
(Base: Respondents whose travel was impacted by the Coronavirus, 770 completed surveys. Data collected March 20-22^h, 2020)

Why the Coronavirus is Impacting Travel

This week, concerns about personal safety became the top reason Americans have changed their travels, with 2-of-3 respondents (62.8%) citing it as a reason. Concerns about contracting the virus and passing it on dropped somewhat this week, while government restrictions grew sharply. See next page for detail.

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

(Base: Respondents whose travel was impacted by the Coronavirus, 770 completed surveys. Data collected March 20-22, 2020)



Why the Coronavirus is Impacting Travel (Detailed Changes)

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

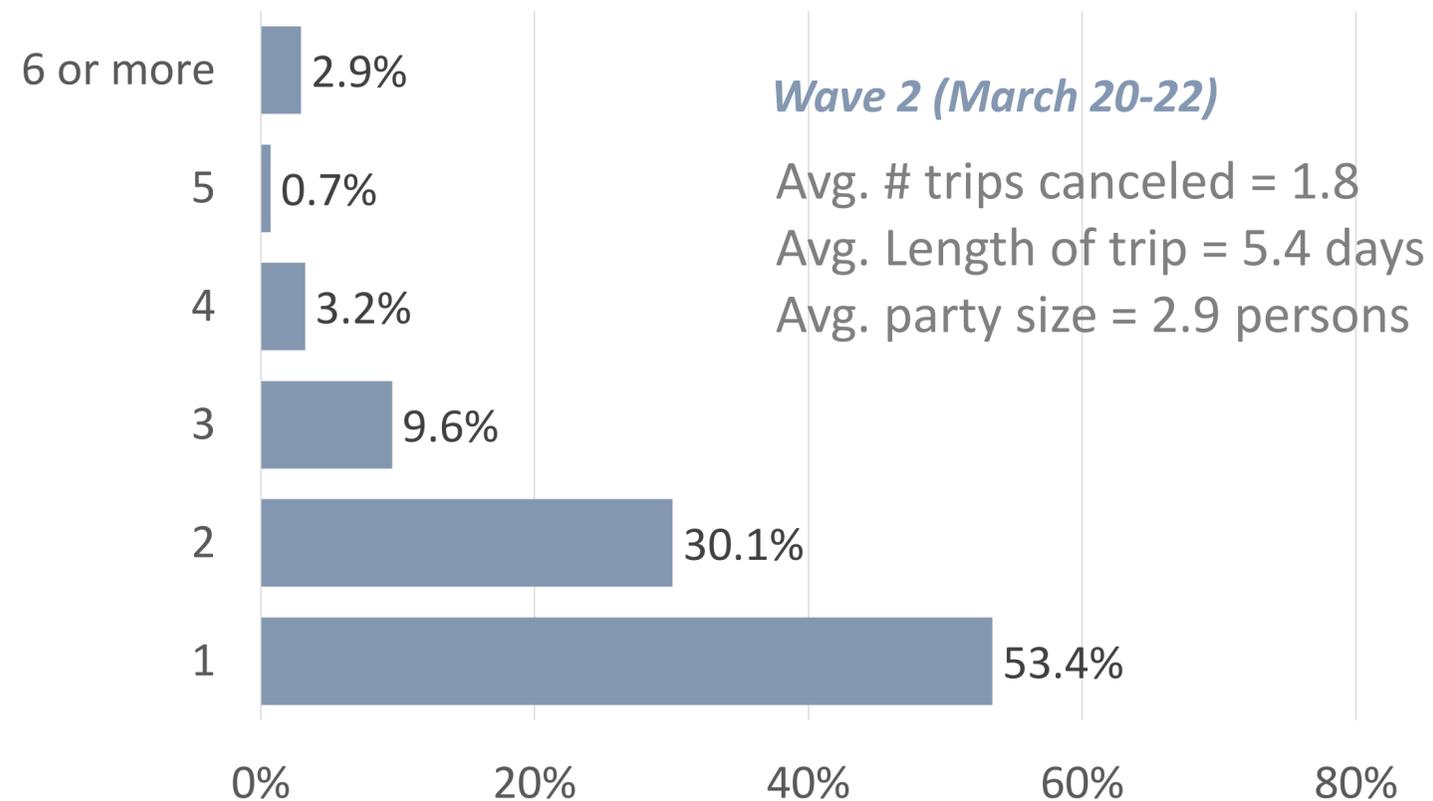
(Base: Respondents whose travel was impacted by the Coronavirus, 770 completed surveys. Data collected March 20-22, 2020)

	March 13 - 15	March 20 - 22	% CHNG
Concerns about my safety	60.1%	62.8%	4.6%
Concerns about contracting the virus and passing it on to others	60.8%	56.4%	-7.1%
Concerns about my loved ones' safety	49.4%	52.4%	5.9%
Potential to get stuck somewhere (unable to get home on schedule)	40.1%	42.4%	5.8%
Potential to have my travel experiences limited/ruined by the situation	30.2%	37.0%	22.6%
Cancellations outside my control (airline flights, cruise trips, tours, etc.)	28.0%	32.9%	17.4%
Government travel restrictions	16.9%	30.6%	80.8%
Cancellations outside my control (events, meetings, conferences, festivals, etc.)	23.1%	27.4%	18.7%
Concerns about Coronavirus situation impacting my personal finances	15.0%	23.0%	53.5%
Business restrictions/employer-mandated restrictions)	6.8%	8.8%	28.3%
Base	552	768	

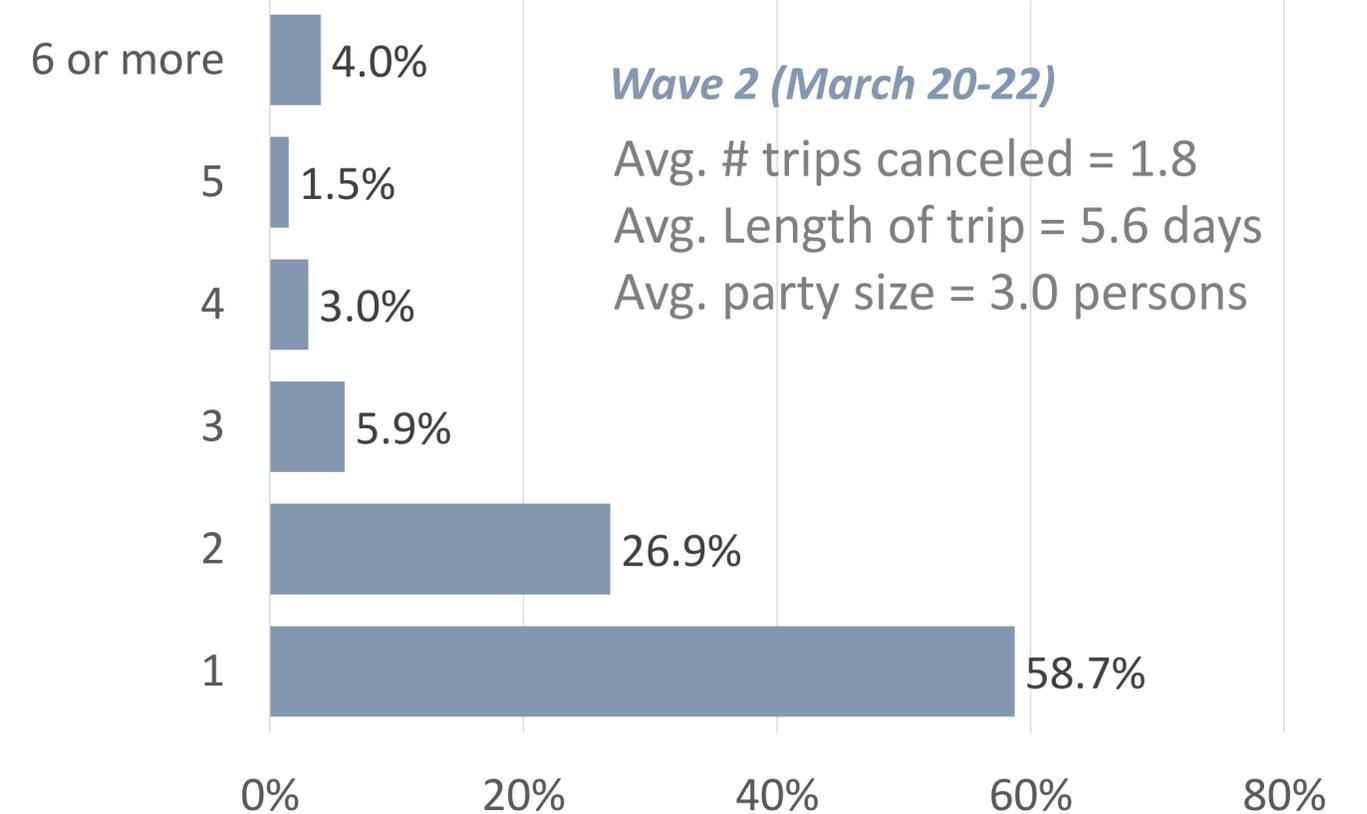
Trips canceled/Postponed

Tripographics reported in wave one did not change much in the current wave. The typical canceled trip was planned to be 5.4 days in length with an immediate travel party of 2.9 persons. Postponed trips were slightly longer (5.6 days) and had bigger parties (3.0 persons.)

Question: How many trips did you cancel?



Question: How many trips did you postpone?



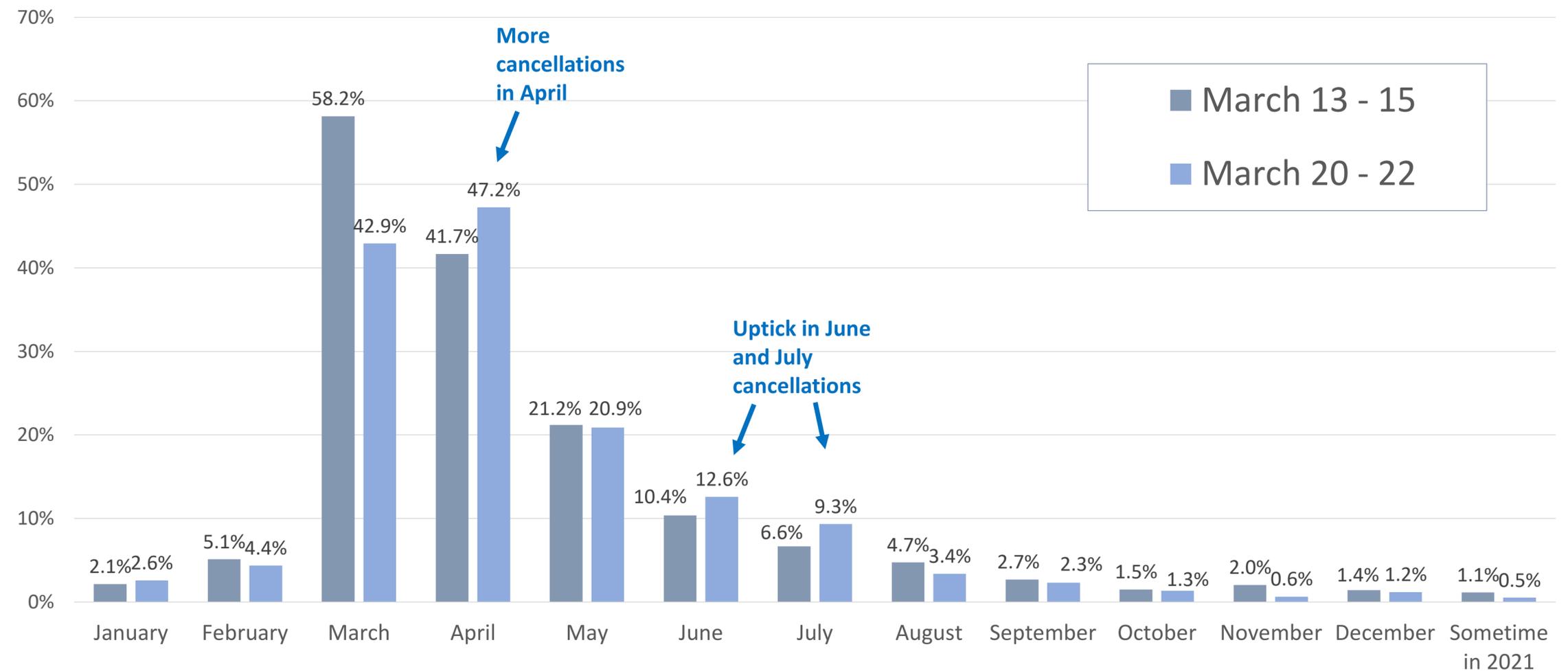
(Base: Respondents canceling/postponing a trip, 477/354 completed surveys. Data collected March 15-17th, 2020)

Month of Trip Cancellation

Most travel cancellations to date have been near-term bookings, but we note small increases this wave in June and July trips being canceled.

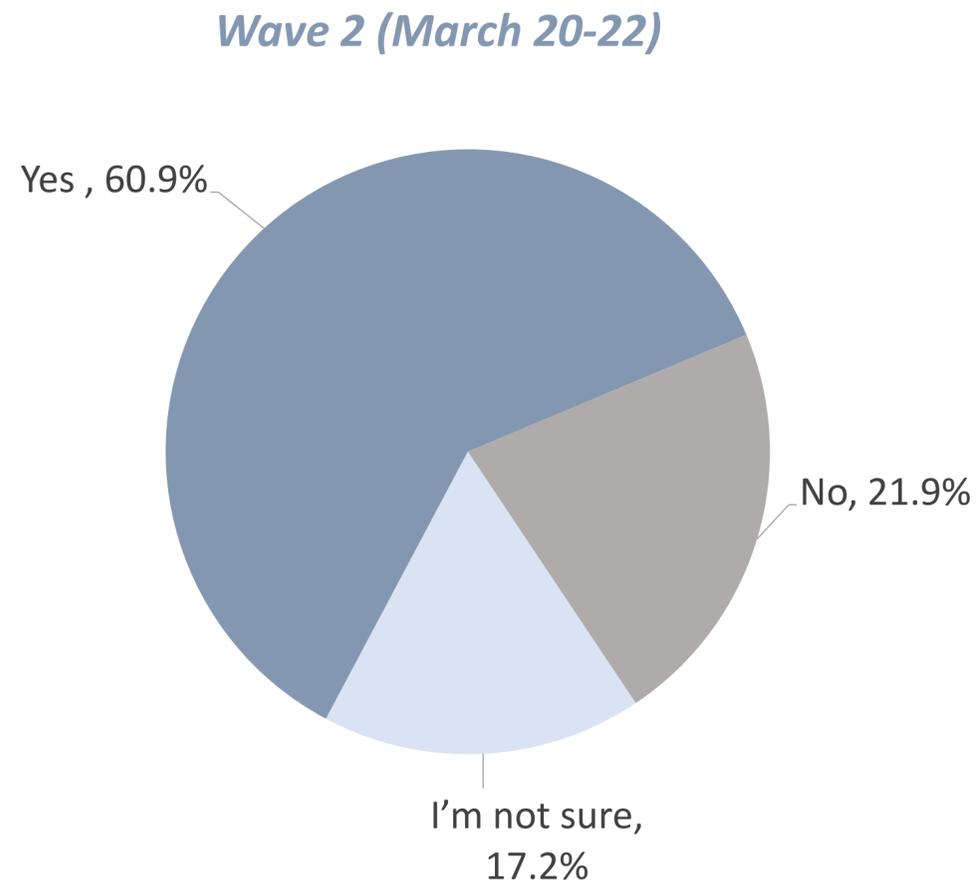
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(Base: Respondents canceling a trip, 477 completed surveys. Data collected March 20-22, 2020)



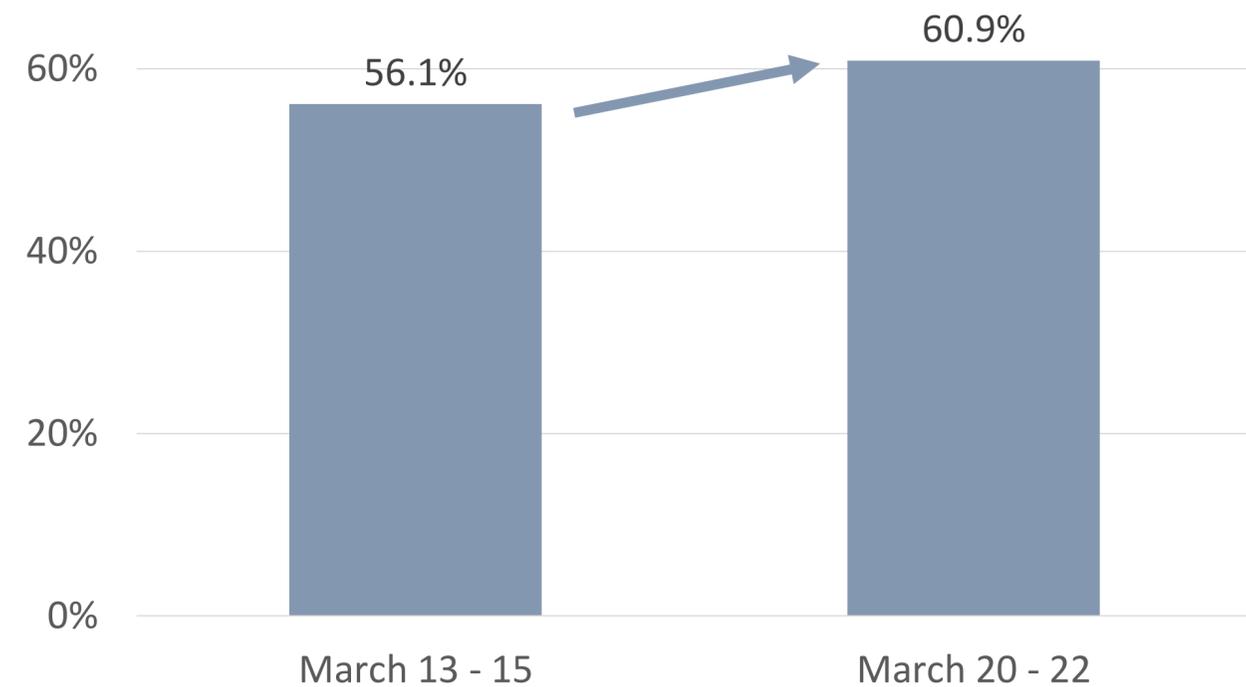
Did Traveler Get Full Refunds?

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



(Base: Respondents canceling a trip, 477 completed surveys. Data collected March 20-22, 2020)

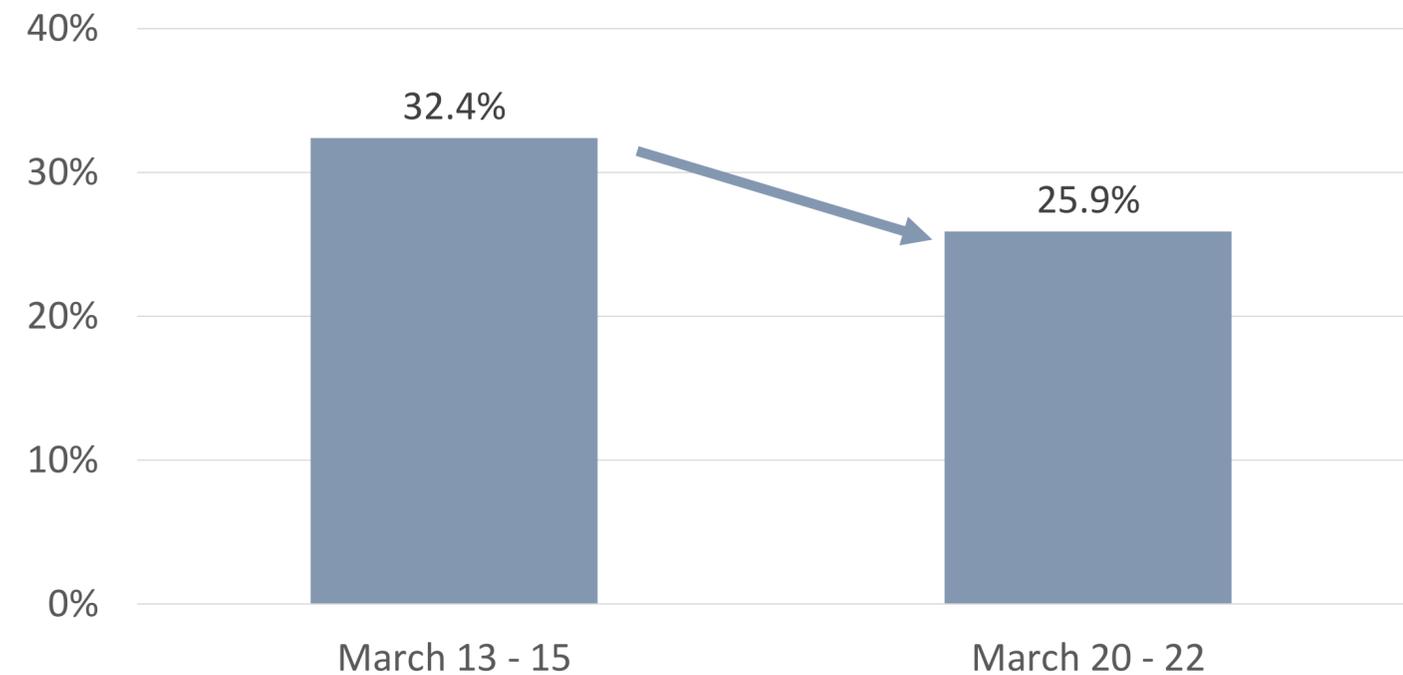
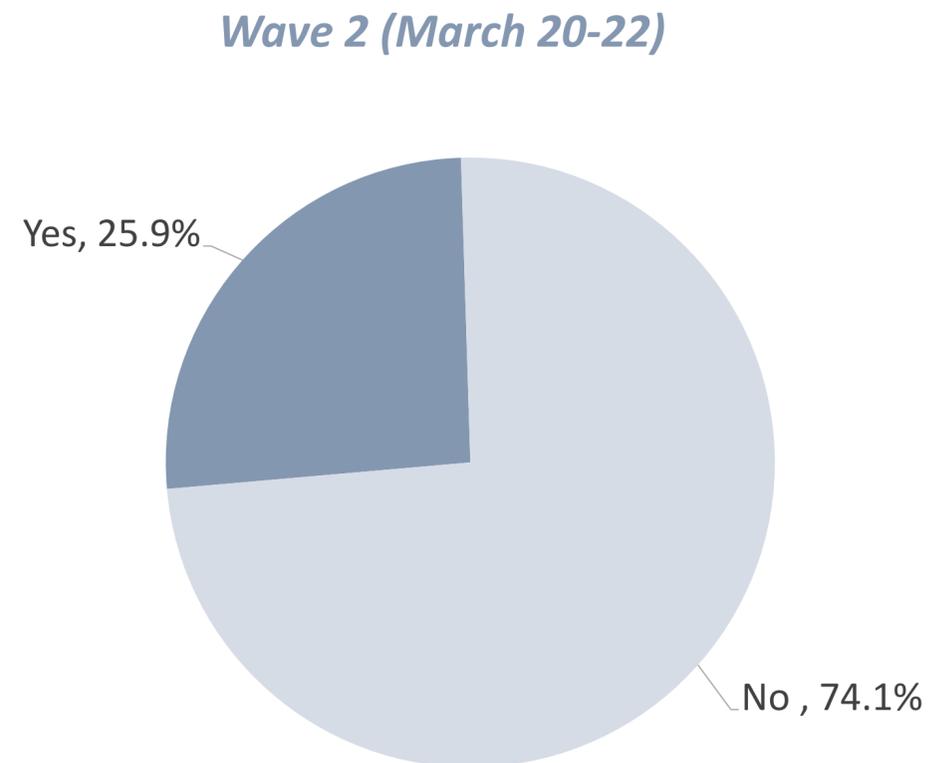
More travelers are getting refunded for canceled trips. This week, 60.9 percent report receiving full refunds, compared to 56.1 percent last week.



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?

Three fourths of postponed trips (74.1%) are currently not being rescheduled.



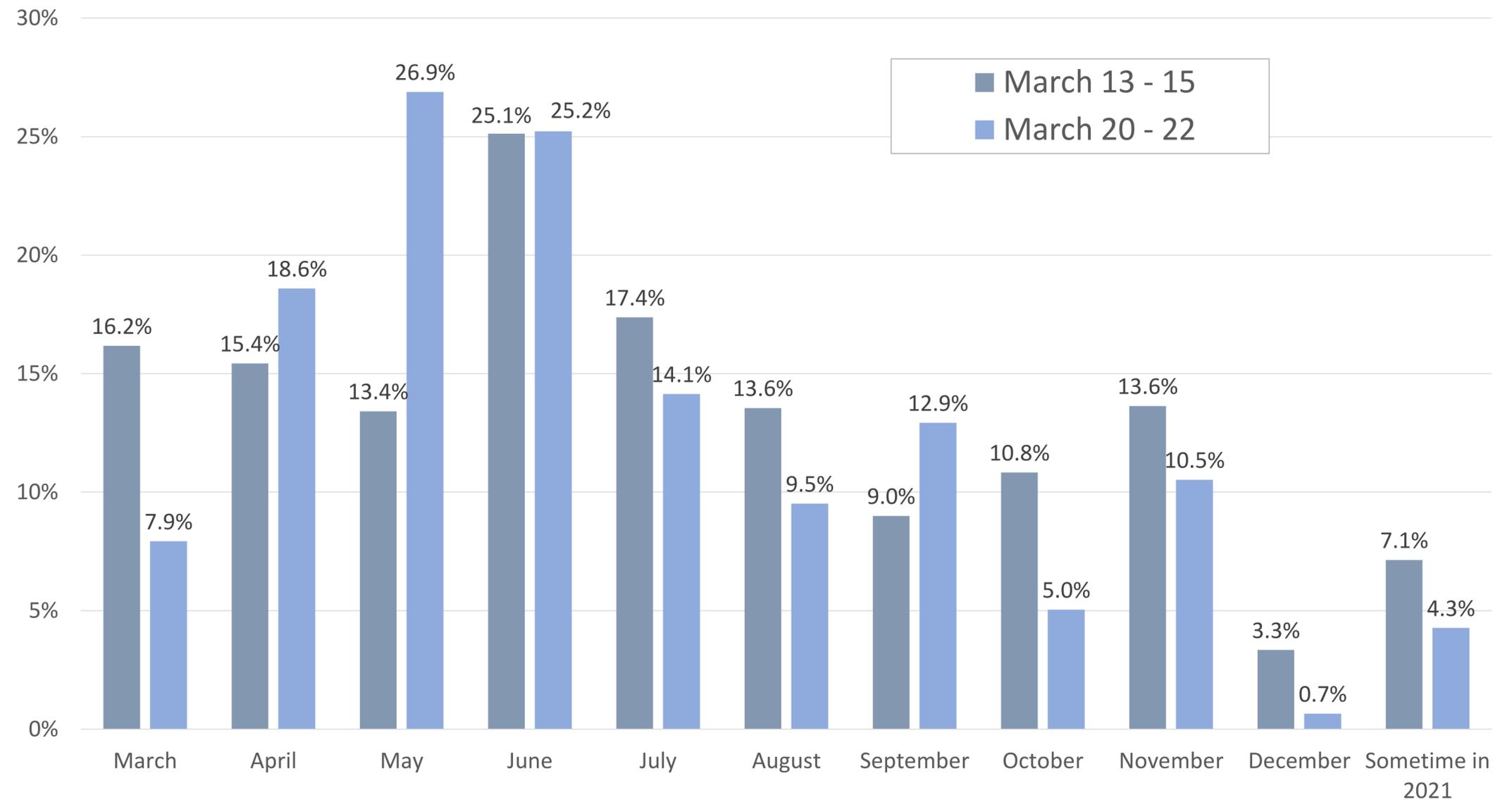
(Base: Respondents postponing a trip, 354 completed surveys. Data collected March 20-22, 2020)

When Postponed Trips Rescheduled

More than half of those rescheduling a trip are planning to take that trip in May or June. This week saw a big jump in the proportion of travelers saying they had rescheduled to May, up to 26.9 percent from 13.4 percent last week.

Question: The trip(s) you postponed were rescheduled to take place in which month(s)? (Select all that apply)

(Base: Respondents postponing a trip, 86 completed surveys. Data collected March 20-22, 2020)

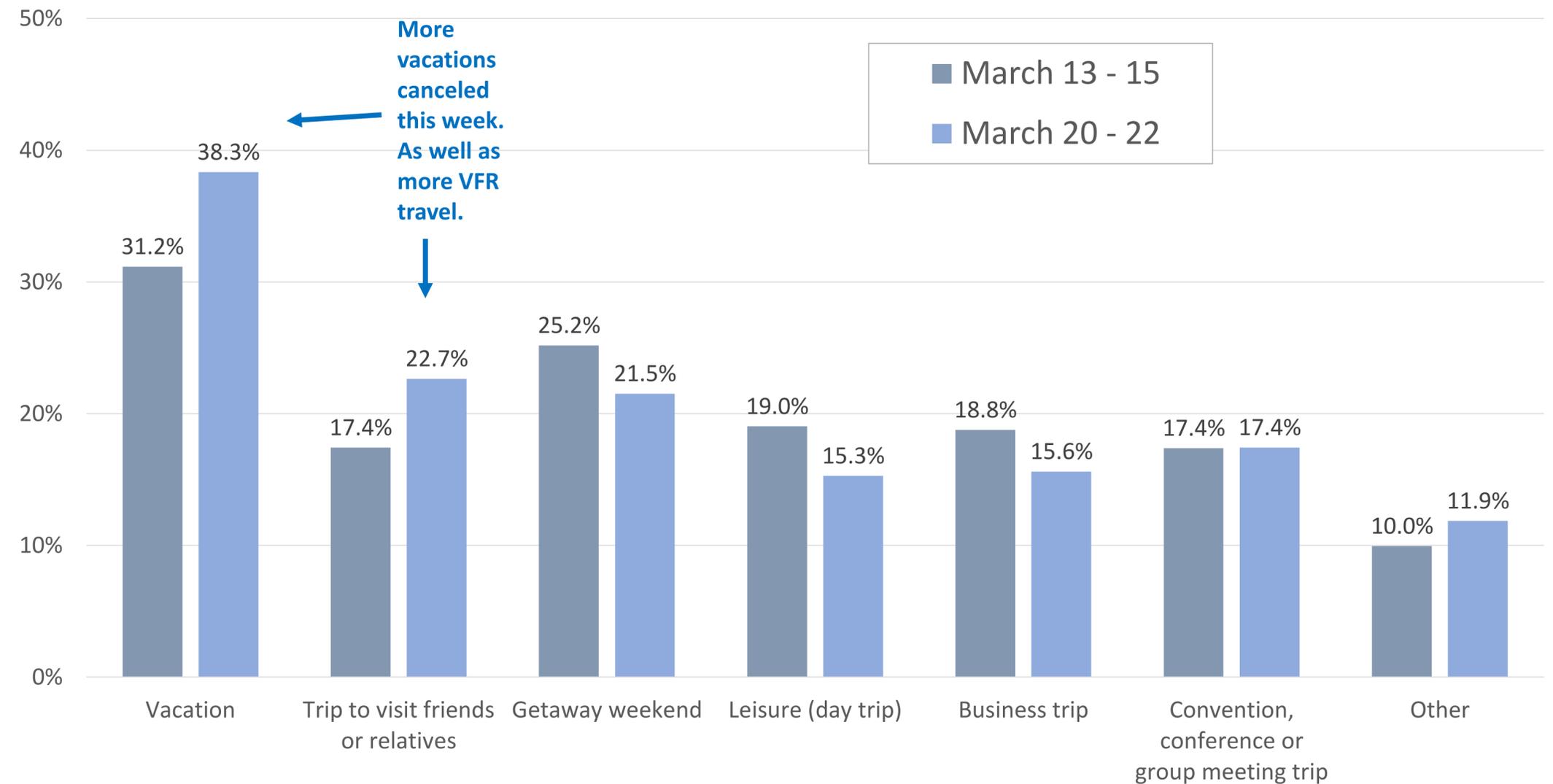


Types of Trips canceled

Cancellations of vacations and weekend trips seemed to have jumped this week, with more travelers saying they had canceled these trip types compared to one week earlier.

Question: What kind of trip (or trips) did you cancel or postpone? (Select all that apply)

(Base: Respondents canceling or postponing a trip, 477 completed surveys. Data collected March 15-17th, 2020)

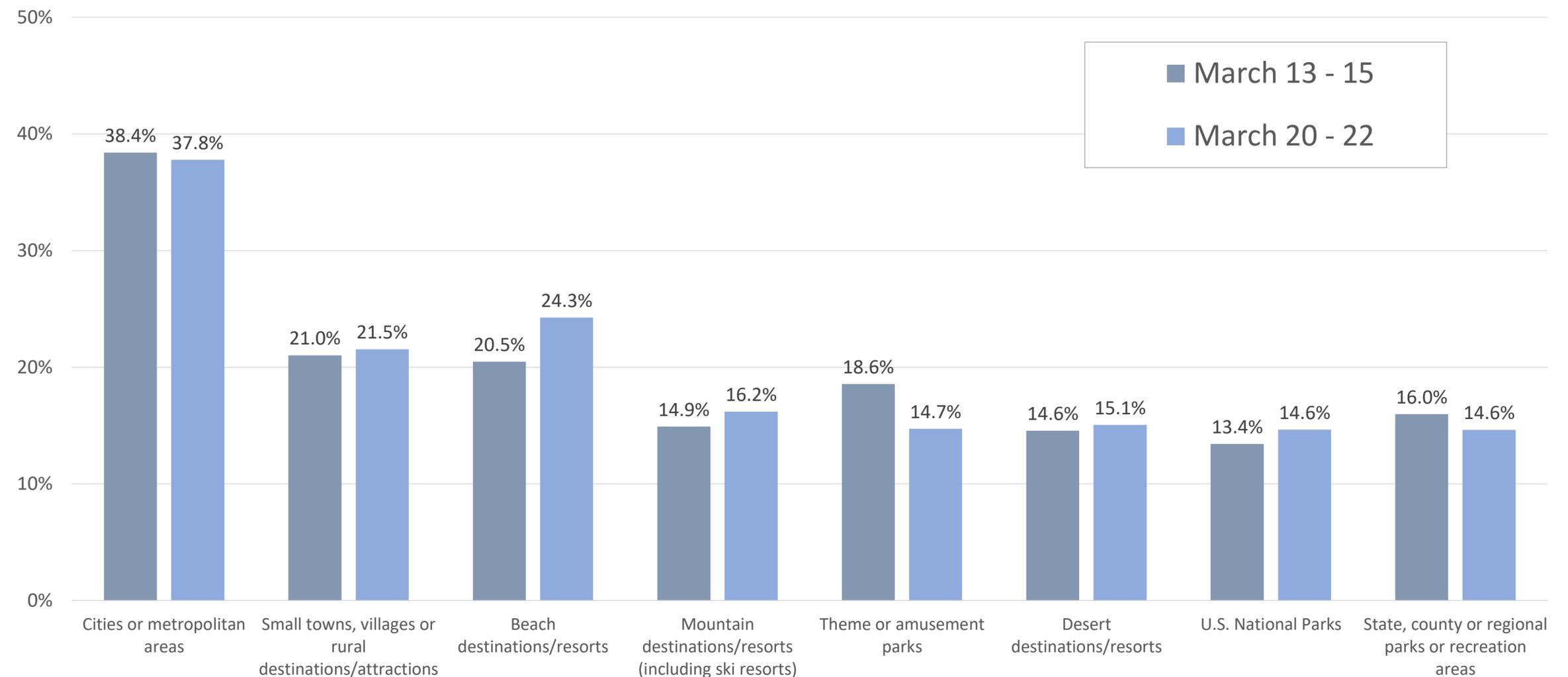


Type of Destination Being canceled

This week there was little change in the types of destinations being canceled, with cities and urban areas still bearing much of the cancellation burden.

Question: Thinking about these canceled or postponed trips, which destination types were you planning to visit but ended up postponing or canceling? (Select all that apply)

(Base: Respondents canceling a trip, 477 completed surveys. Data collected March 20-22, 2020)

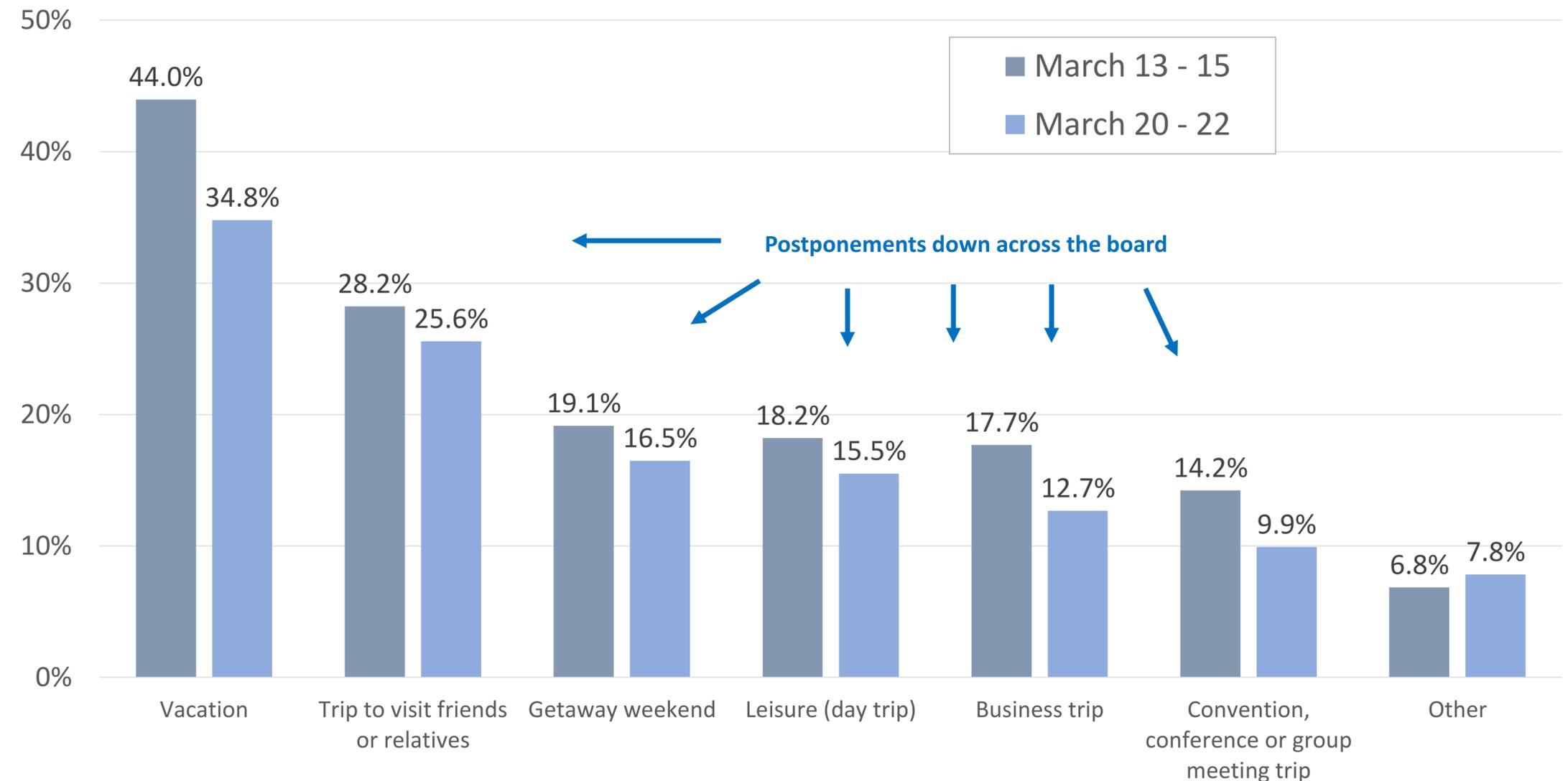


Types of Trips Postponed

Consistent with the trend of more cancellations rather than postponements, the proportion of travelers postponing each type of trip was down this week.

Question: What kind of trip (or trips) did you cancel or postpone?
(Select all that apply)

(Base: Respondents canceling or postponing a trip, 477 completed surveys. Data collected March 20-22, 2020)

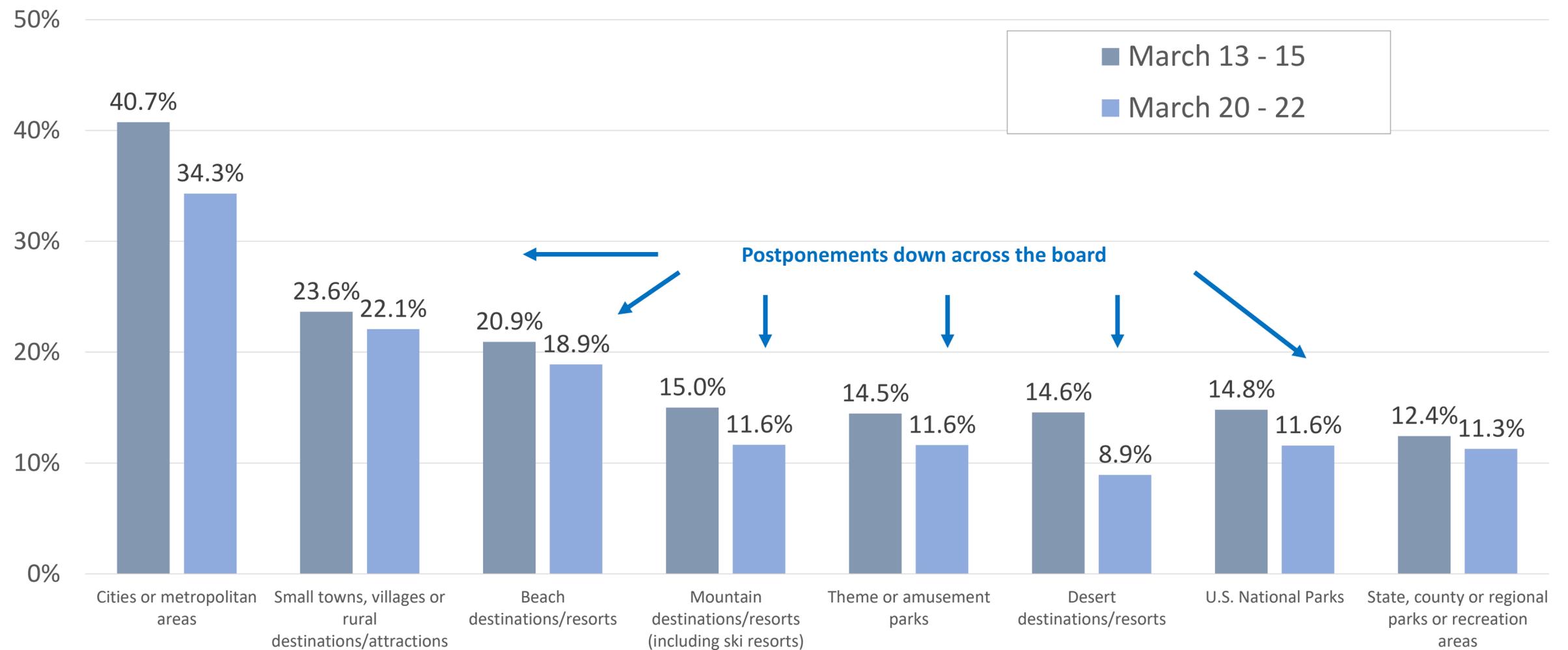


Type of Destination Being Postponed

Similarly, all destination types saw decreases in the proportion of travelers postponing trips.

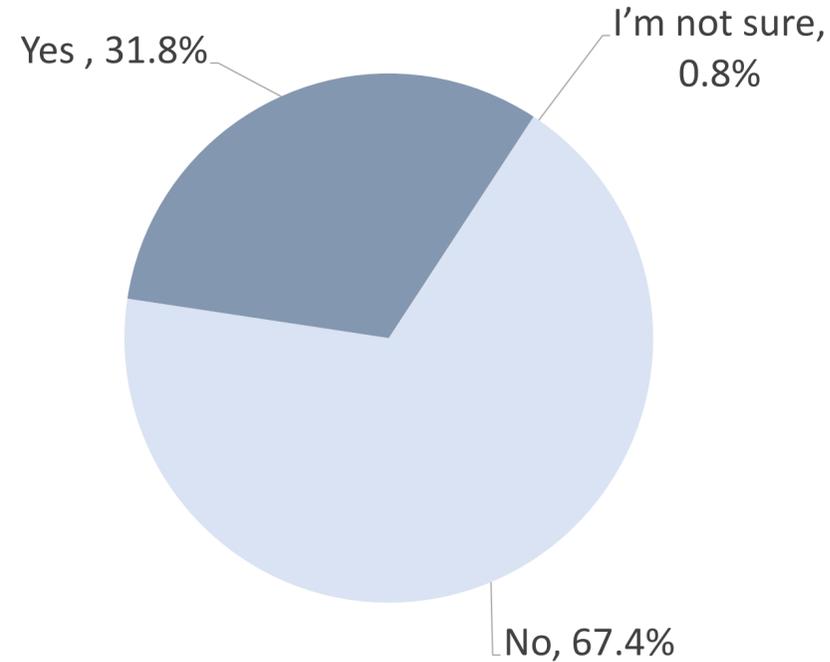
Question: Thinking about these canceled or postponed trips, which destination types were you planning to visit but ended up postponing or canceling? (Select all that apply)

(Base: Respondents canceling a trip, 477 completed surveys. Data collected March 20-22, 2020)

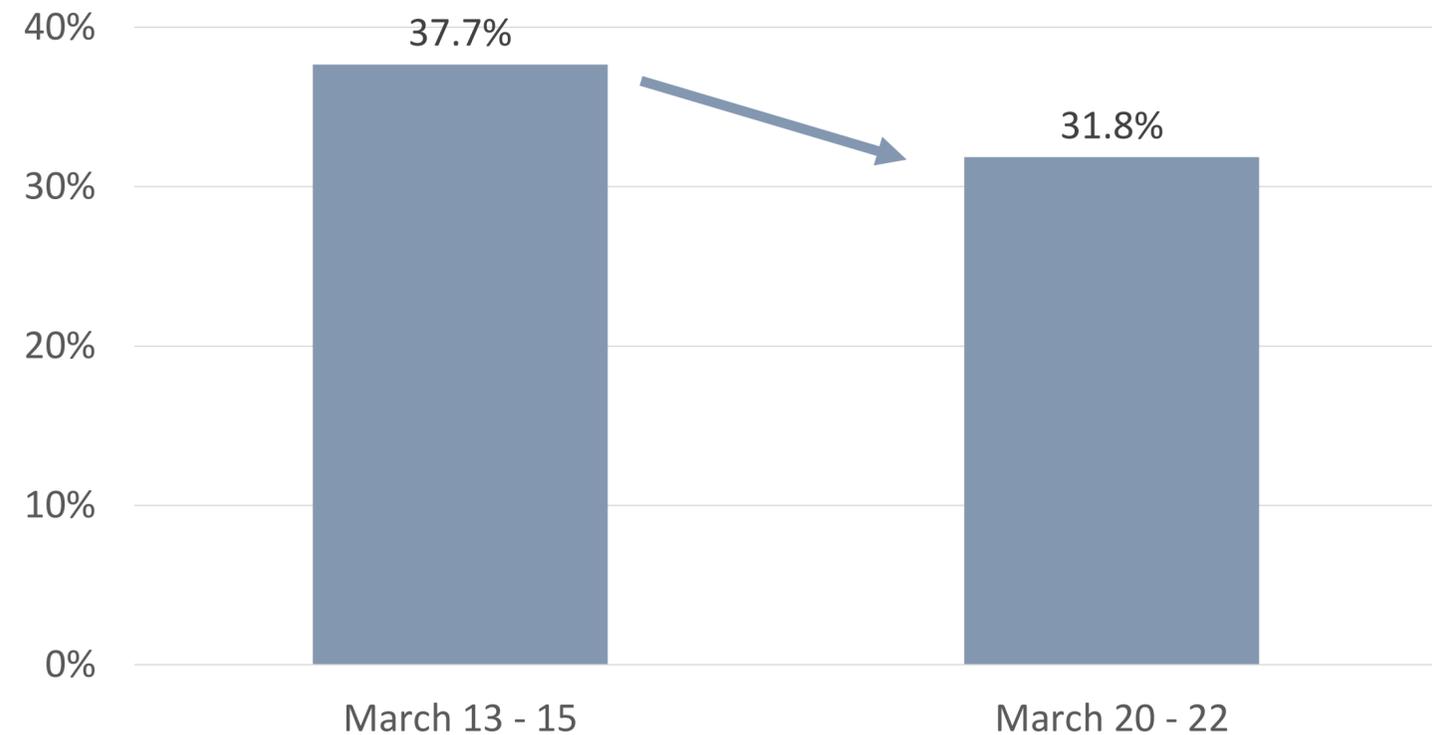


International Trips Postponed and canceled

Question: Were any of the trips you canceled or postponed foreign trips (i.e., travel to countries outside the United States)?



Almost one third (31.8%) of those postponing or canceling a trip did so for a trip to a foreign country, down from 37.7 percent last week.



(Base: Respondents canceling or postponing a trip, 770 completed surveys. Data collected March 20-22, 2020)

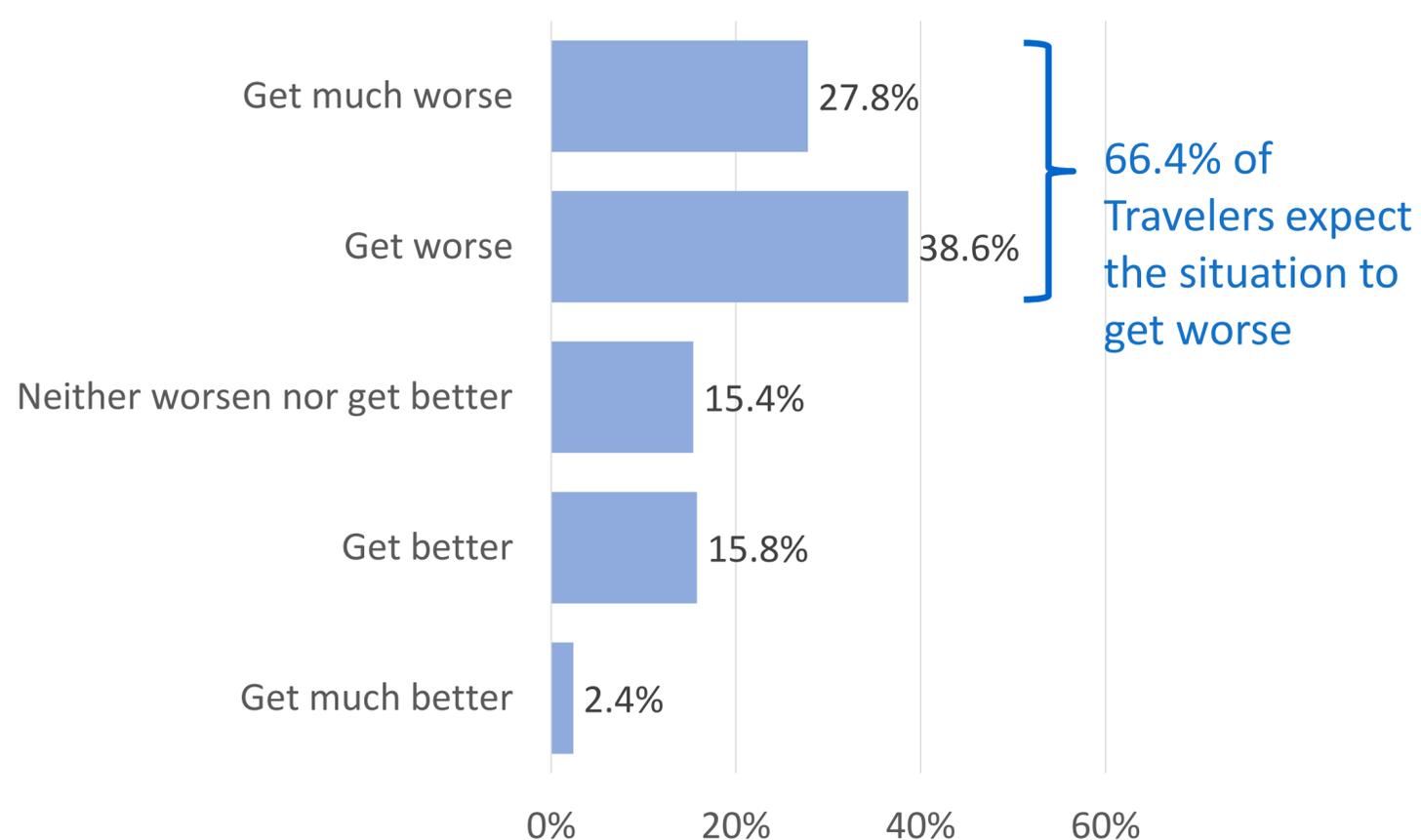


**Section III:
Opinions on Travel
& the Coronavirus**

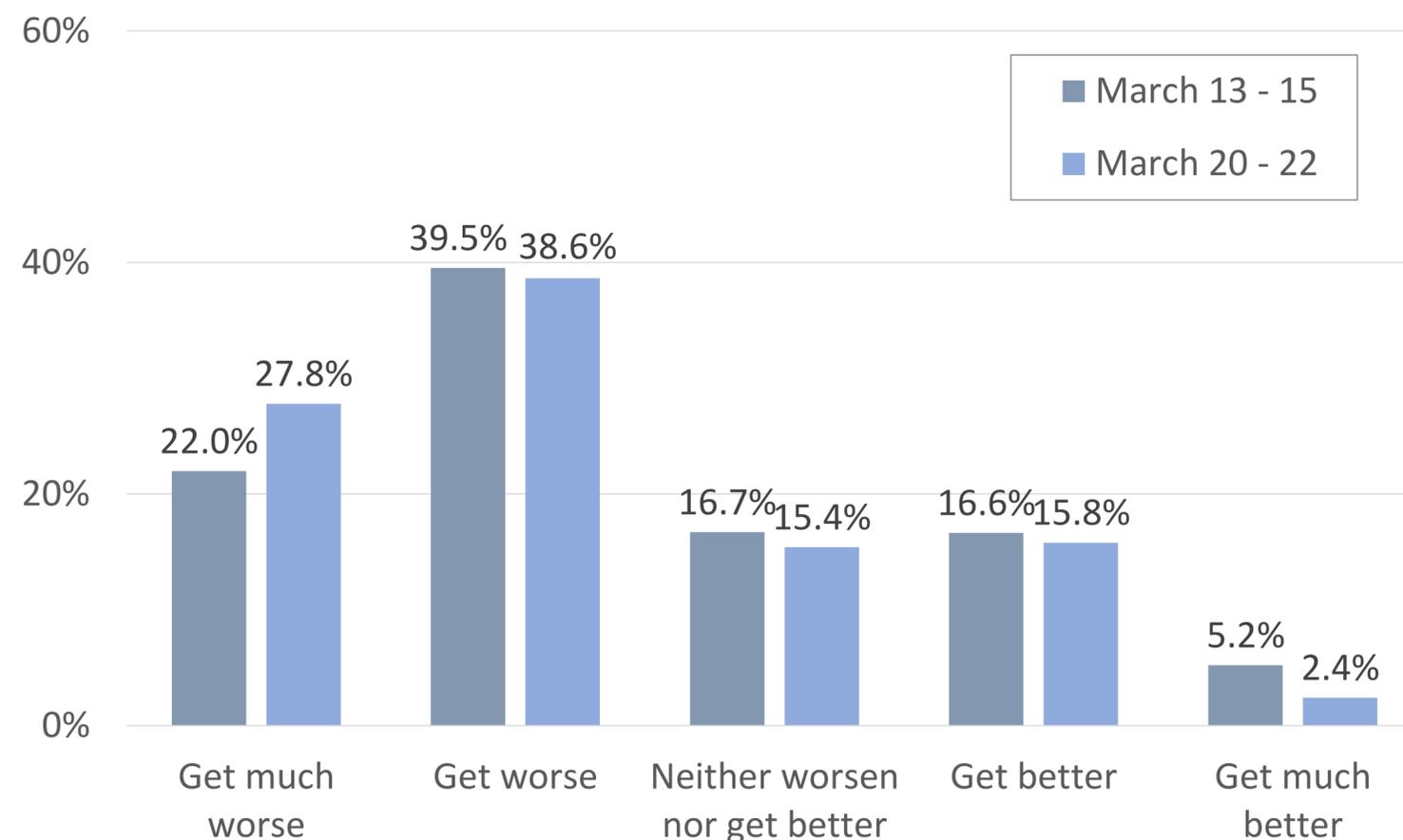
Expectations for Coronavirus Outbreak

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 _____



This week, 2-of-3 travelers expect the Coronavirus situation to get worse in the next month. Last week, this figure stood at 58.5 percent.



(Base: All respondents, 1,201 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)

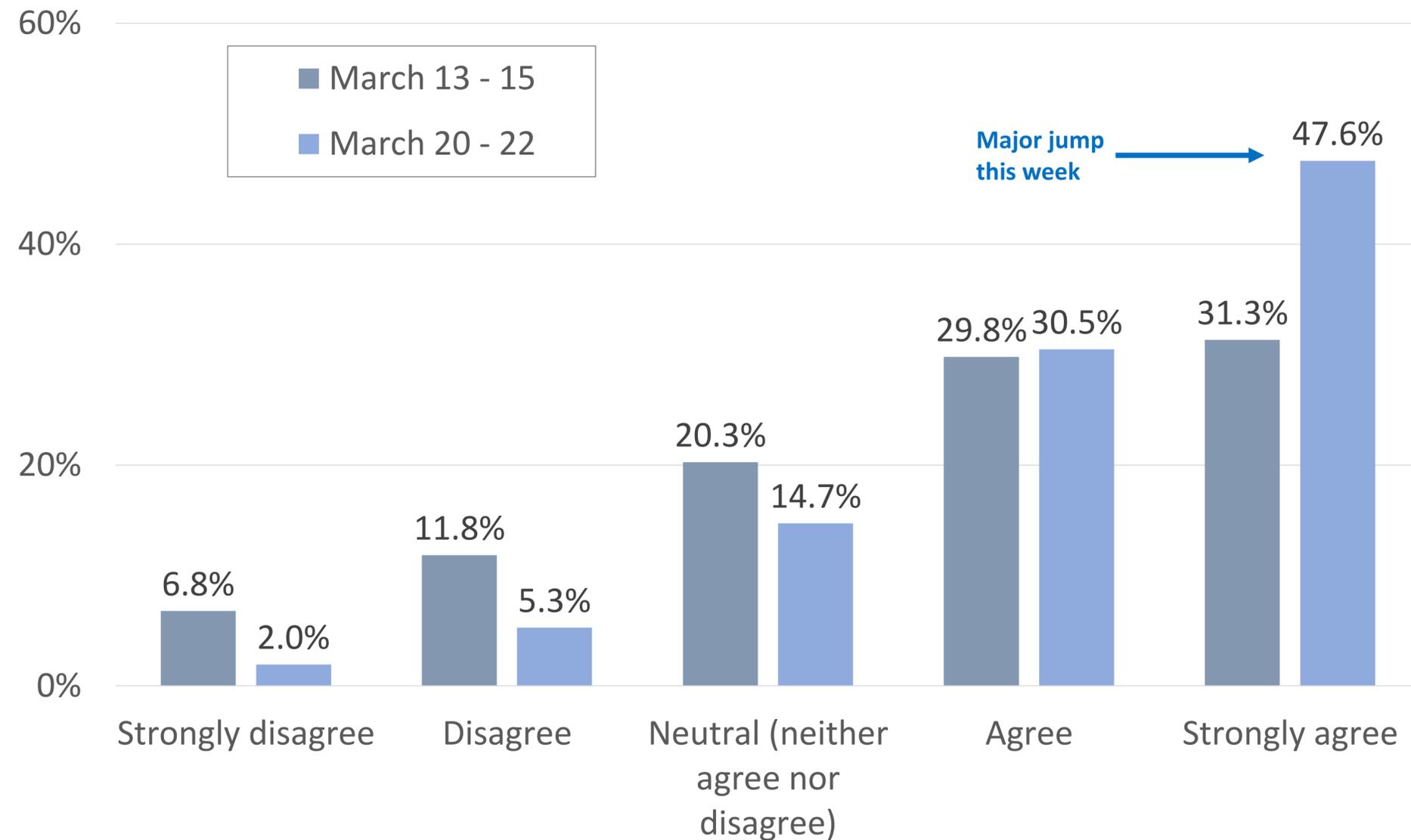
Avoiding Travel Until the Crisis Blows Over

Now, 78.0 percent of American travelers say they are done traveling until the Coronavirus situation blows over. Last week, this figure stood at 61.1 percent.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



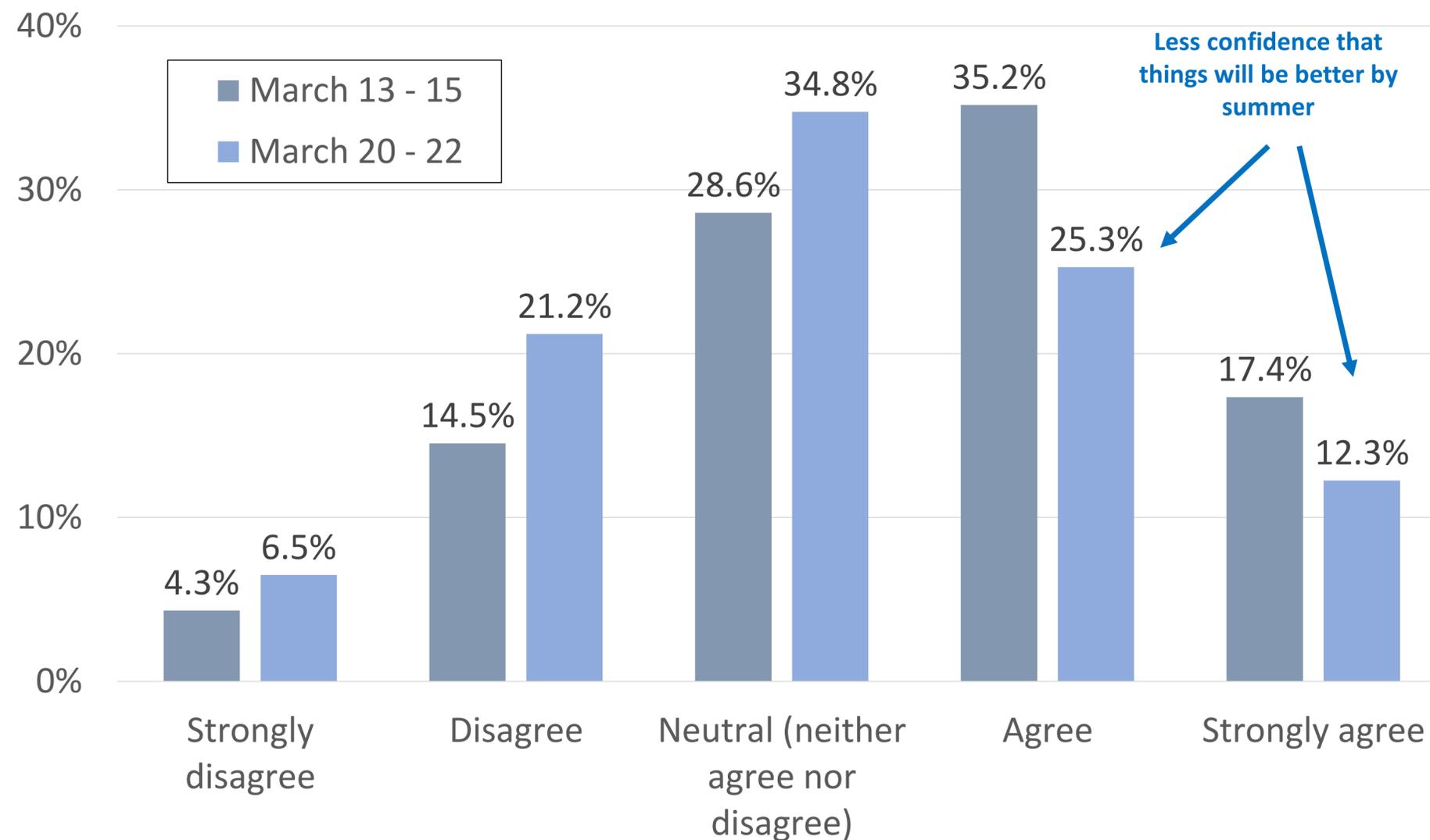
Expectations for Summer Travel Season

Uncertainty abounds. Last week about half of travelers (52.5%) saw the Coronavirus situation resolving itself before summer. Now, only about 1-in-3 (37.5%) agree.

How much do you agree with the following statement?

Statement: I expect the Coronavirus situation will be resolved before the summer travel season.

(Base: All respondents, 1,201 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



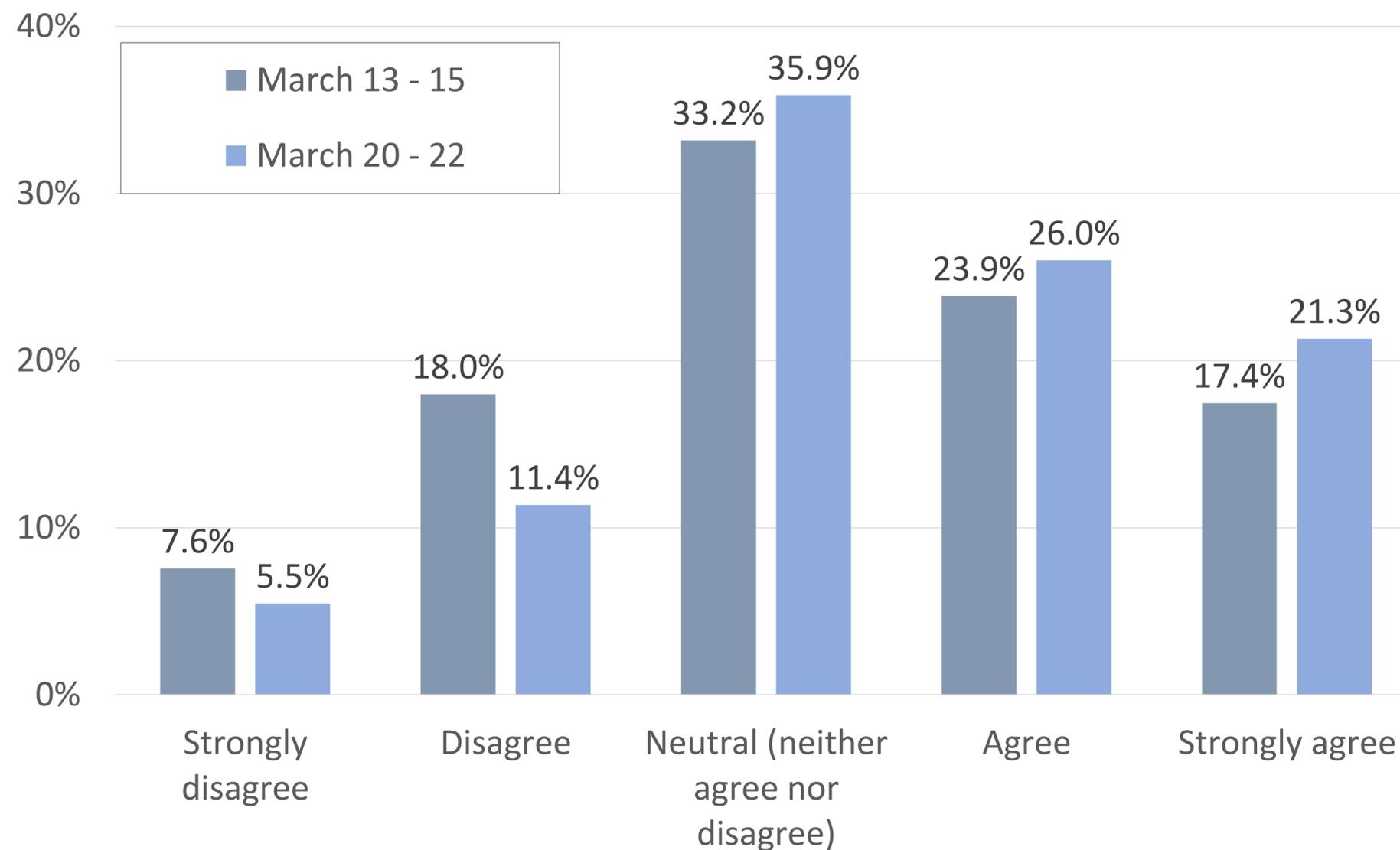
Staycations as a Replacement for Vacations

The percent of Americans considering staycations rather than vacations this summer edged up this week. One week ago, 41.3 percent “Agreed” or “Strongly agreed” that they’d probably take a staycation rather than a vacation. The figure is now 47.3 percent.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



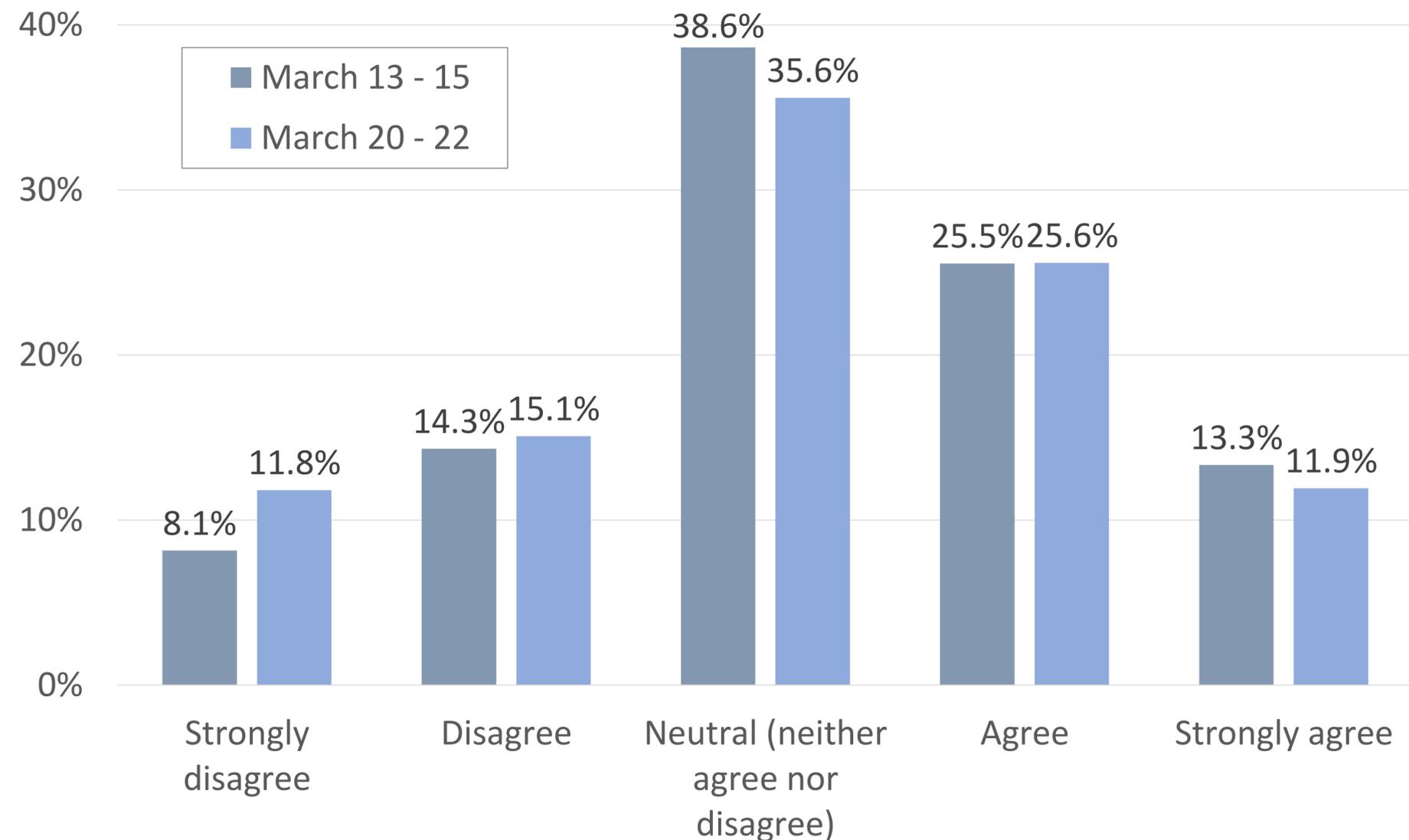
Replacing Air Travel With Road Trips

Road trips may replace some air travel this year, with about one third of American travelers saying they may avoid airlines and travel by car instead. This metric changed very little week-over-week.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



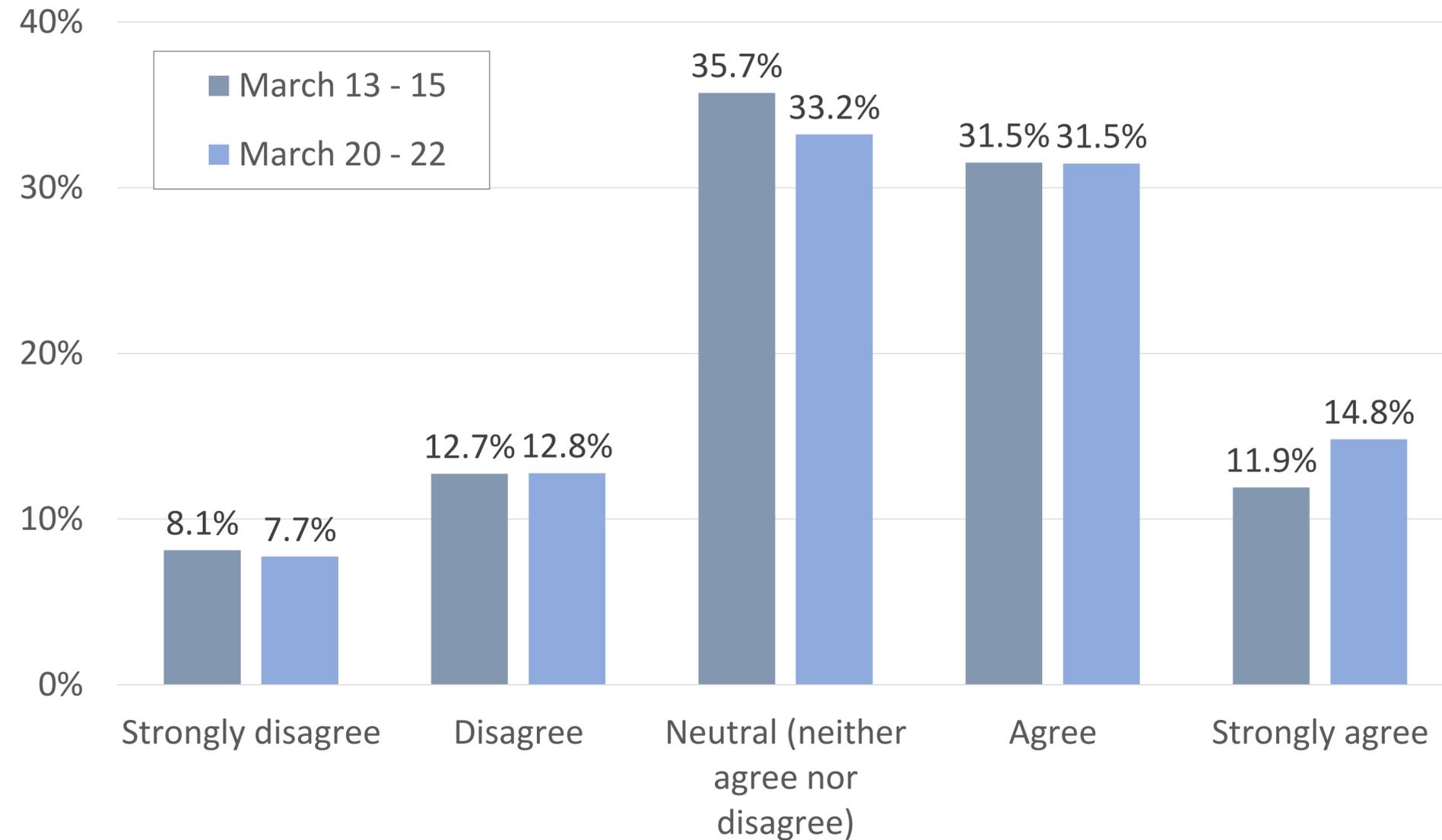
Replacing Long-haul Travel with Regional Trips

Similarly, 46.3 percent of American travelers “Agree” or “Strongly agree” that they’ll probably be taking more regional trips while avoiding long-haul 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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



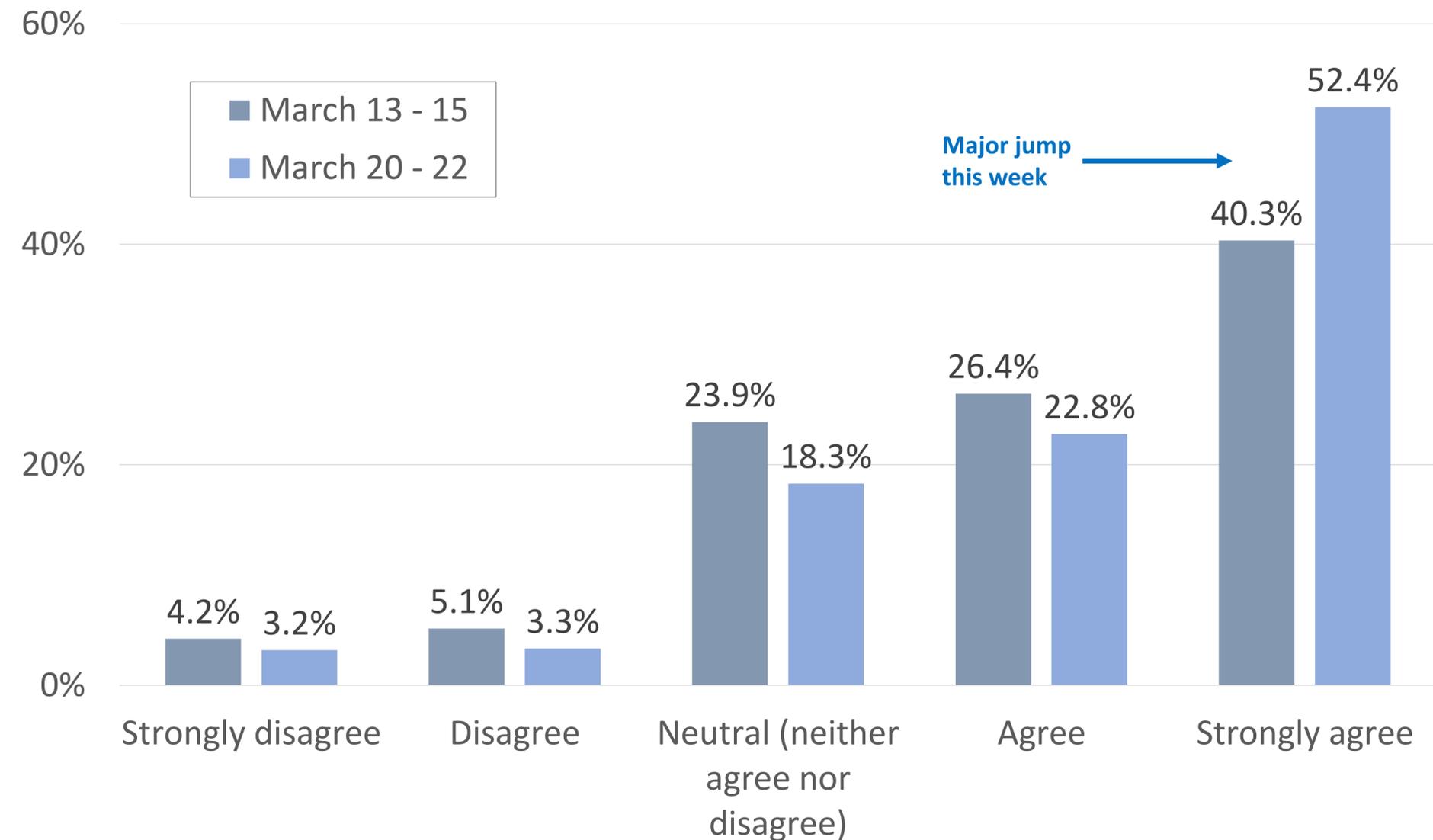
Avoiding Conventions & Conferences

Enthusiasm for attending meetings in the current environment has declined significantly. Two of three travelers (75.2%) now say they will be unlikely to attend these events until the Coronavirus situation is over, up from 66.8 percent last week.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



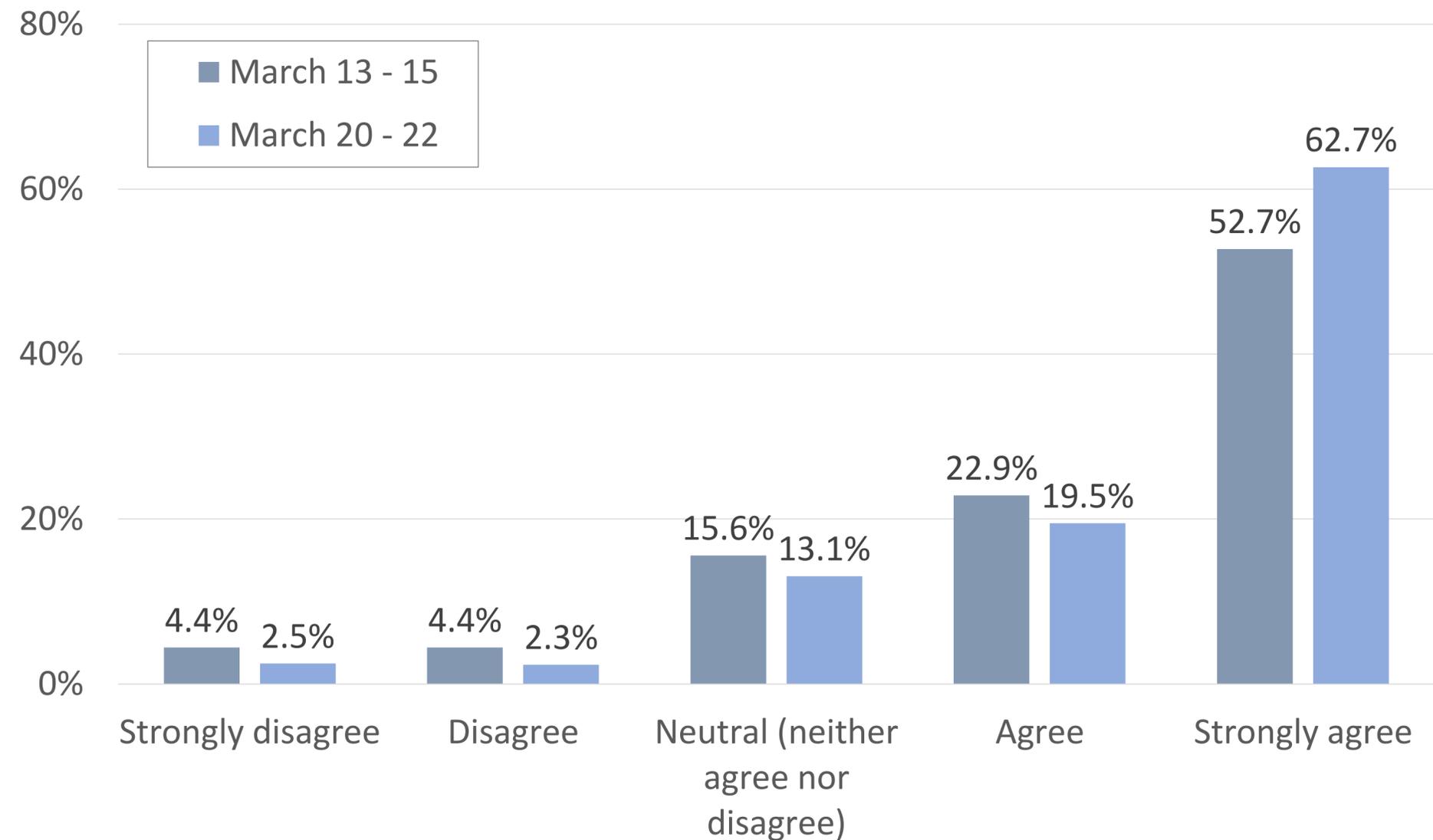
Avoiding International Travel

Interest in international travel has also declined significantly in just one week. 4-in-5 American travelers (82.1%) said they're unlikely to travel outside the U.S. until the Coronavirus situation is resolved.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



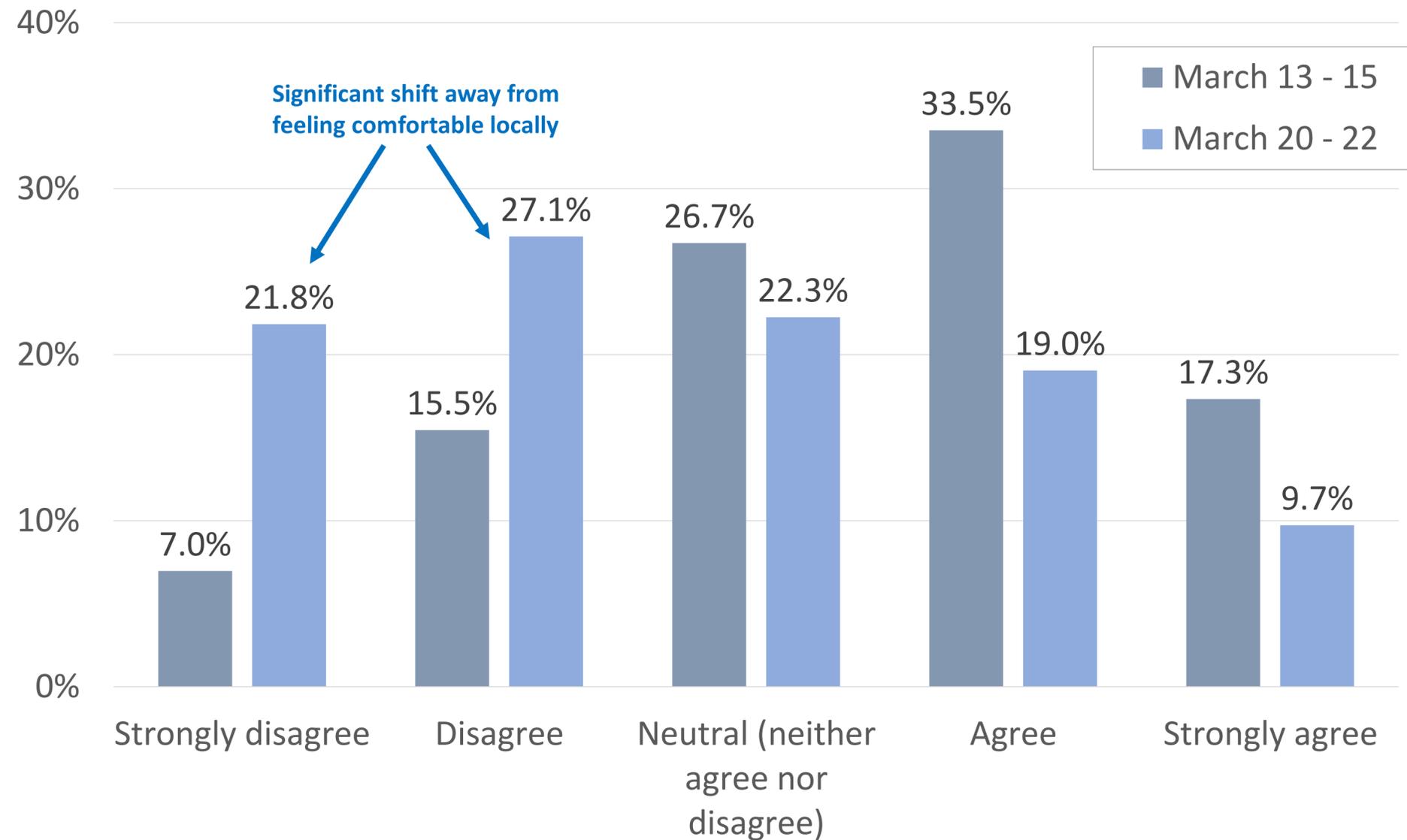
Comfort Enjoying Home Community

Americans' comfort in going out in their own communities to enjoy themselves tanked this week. Last week about half (50.8%) of American travelers said they felt comfortable doing this. Now less than one third (28.8%) agree.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



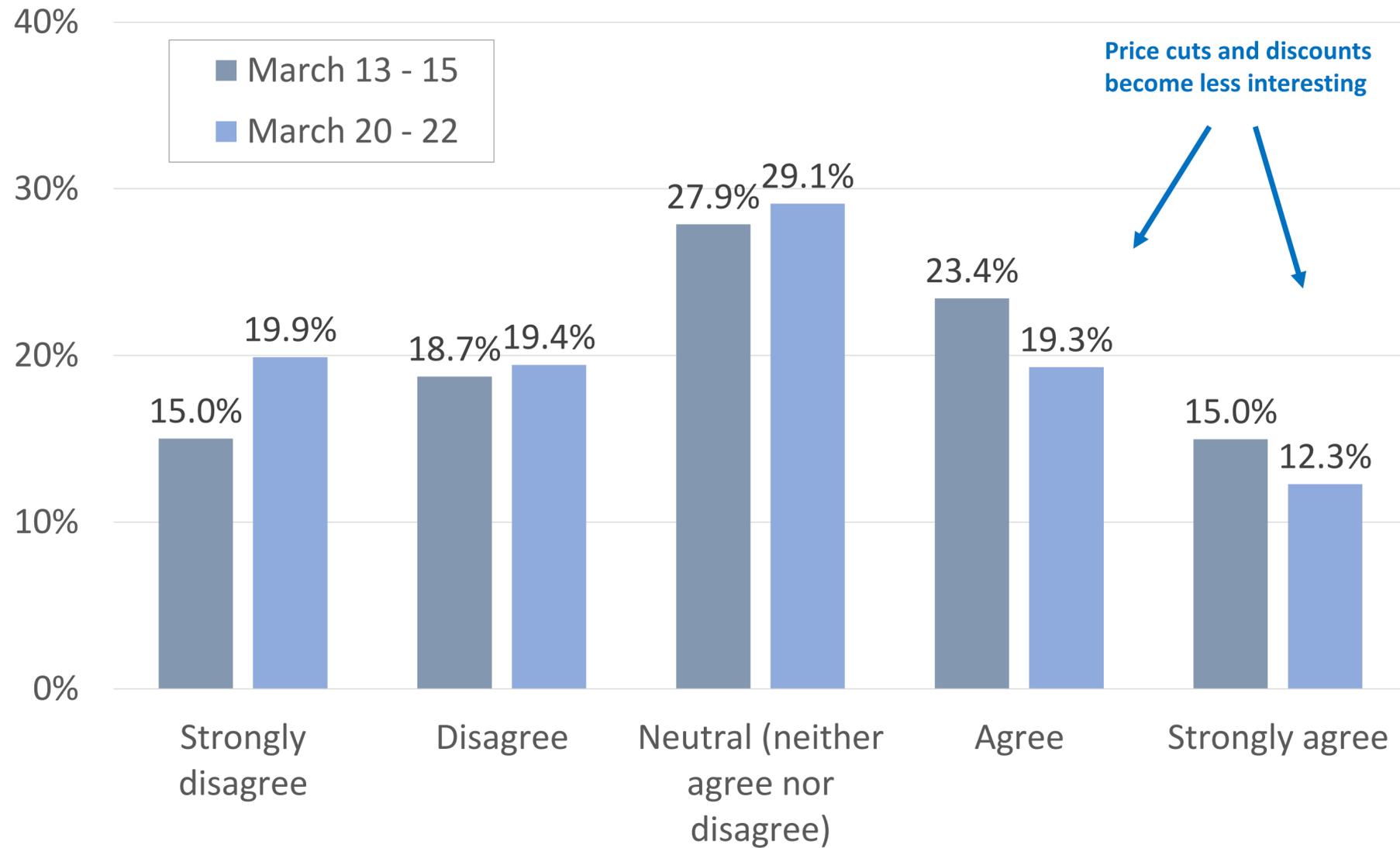
Discounts and Price Cuts

Price cuts and discounts as a way to stimulate travel have lost a little of their luster this week. In wave one of the survey, 38.4 percent of Americans said they were to some degree interested in taking advantage of these offers. Now, 31.6 percent agree.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



Travel Shaming

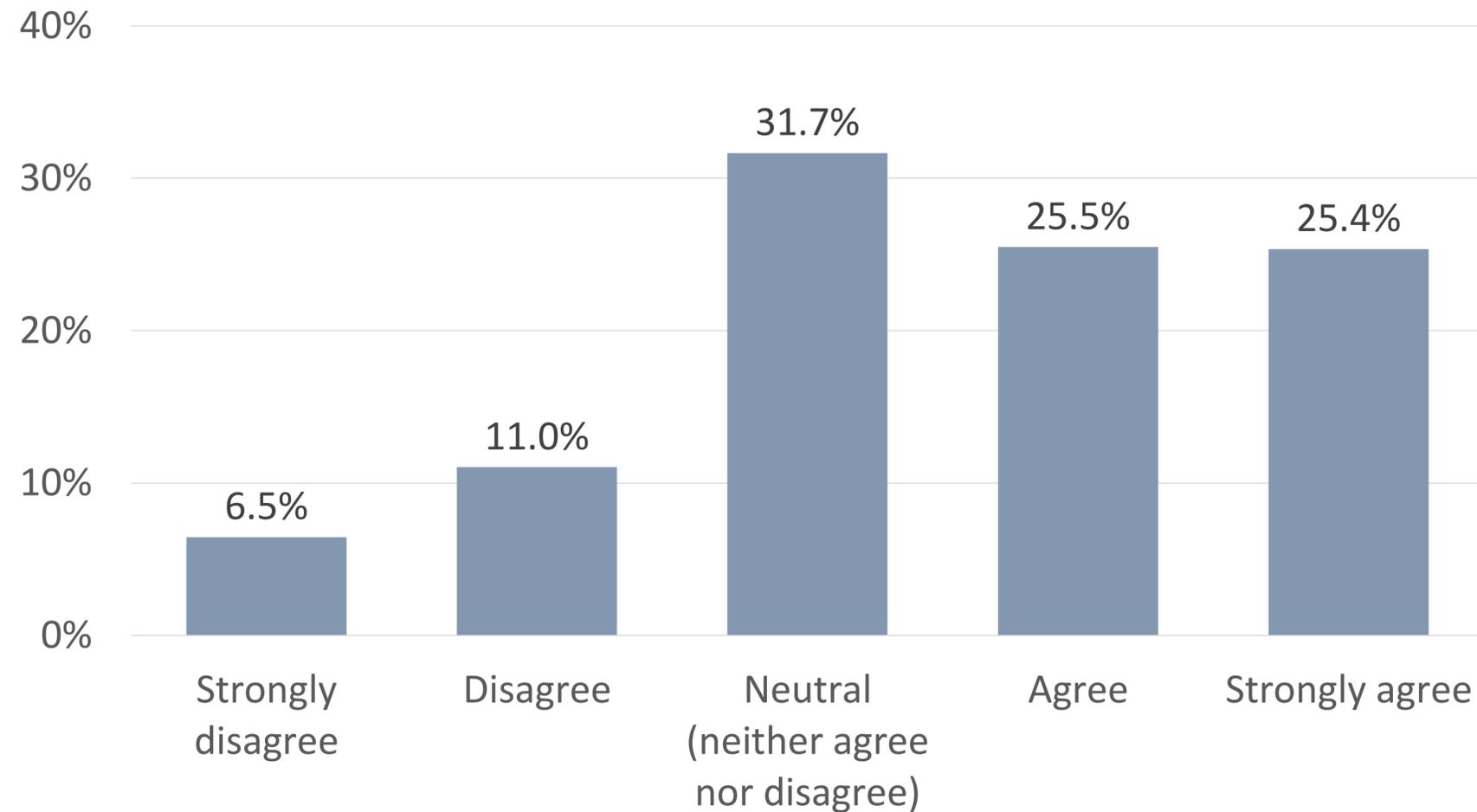
Half of Americans (50.9%) feel that persons traveling now should feel ashamed. Interestingly, only 17.5 percent disagree.

How much do you agree with the following statement?

Statement: People who continue to travel right now should be ashamed of themselves.

(Base: All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)

New Question Added in Wave 2 (March 20-22)



Note: This is a new question added in Wave 2 of the project. No Wave 1 data is available for comparison.

Supporting Local Businesses

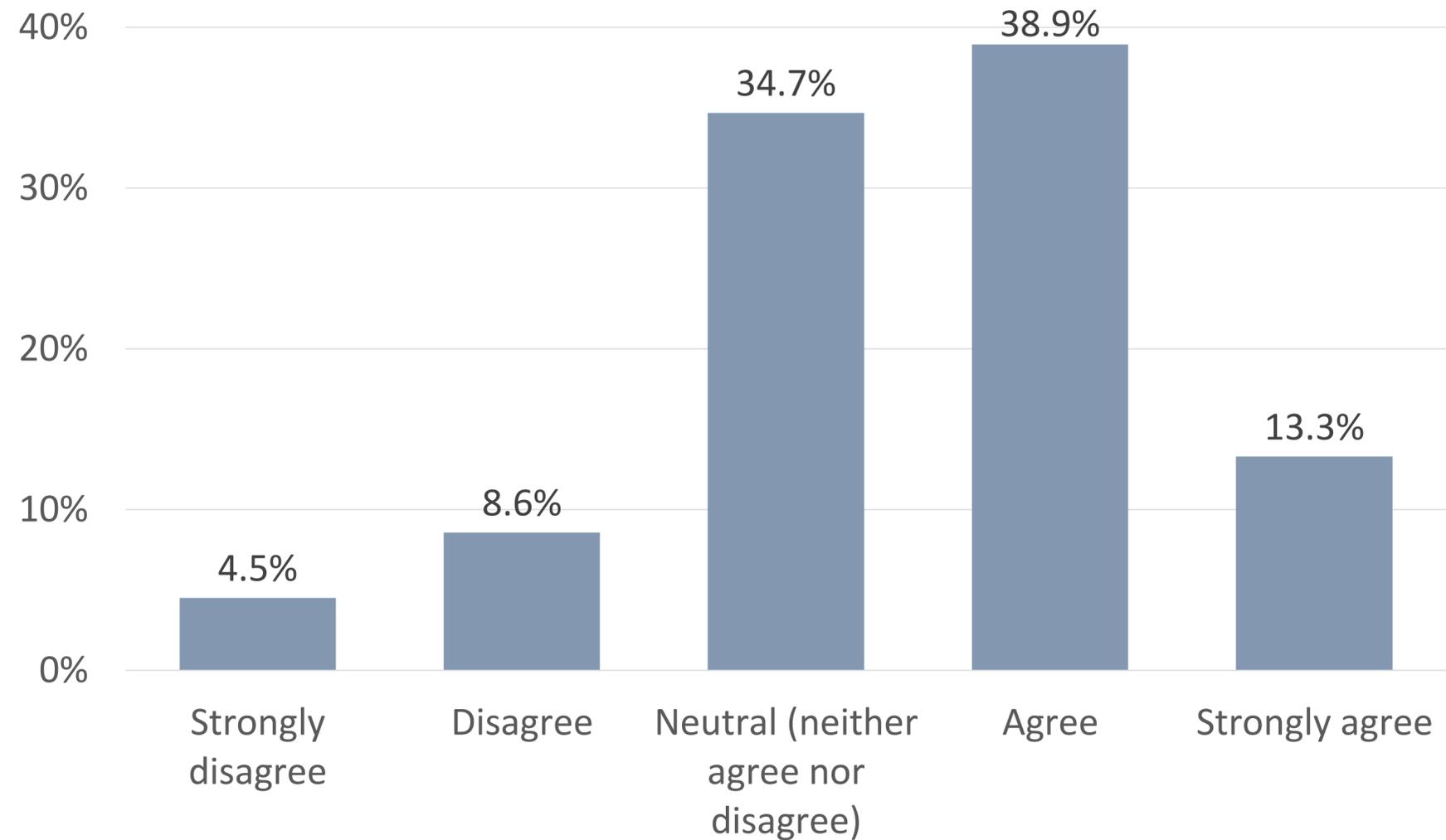
About half of American travelers (52.2%) say they have been taking action to try to support local businesses where they live.

How much do you agree with the following statement?

Statement: I have been taking action to try to support local businesses where I live.

(Base: All respondents, 1,200 completed surveys. Data collected March 20-22, 2020)

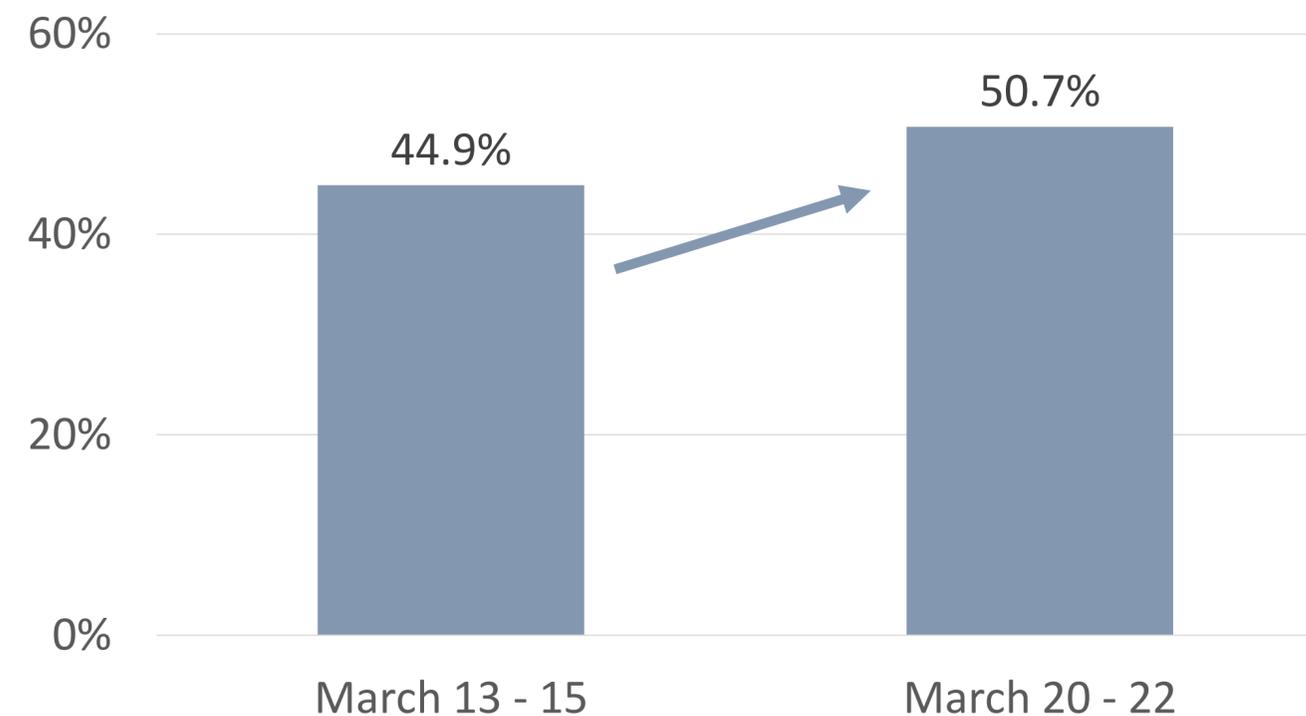
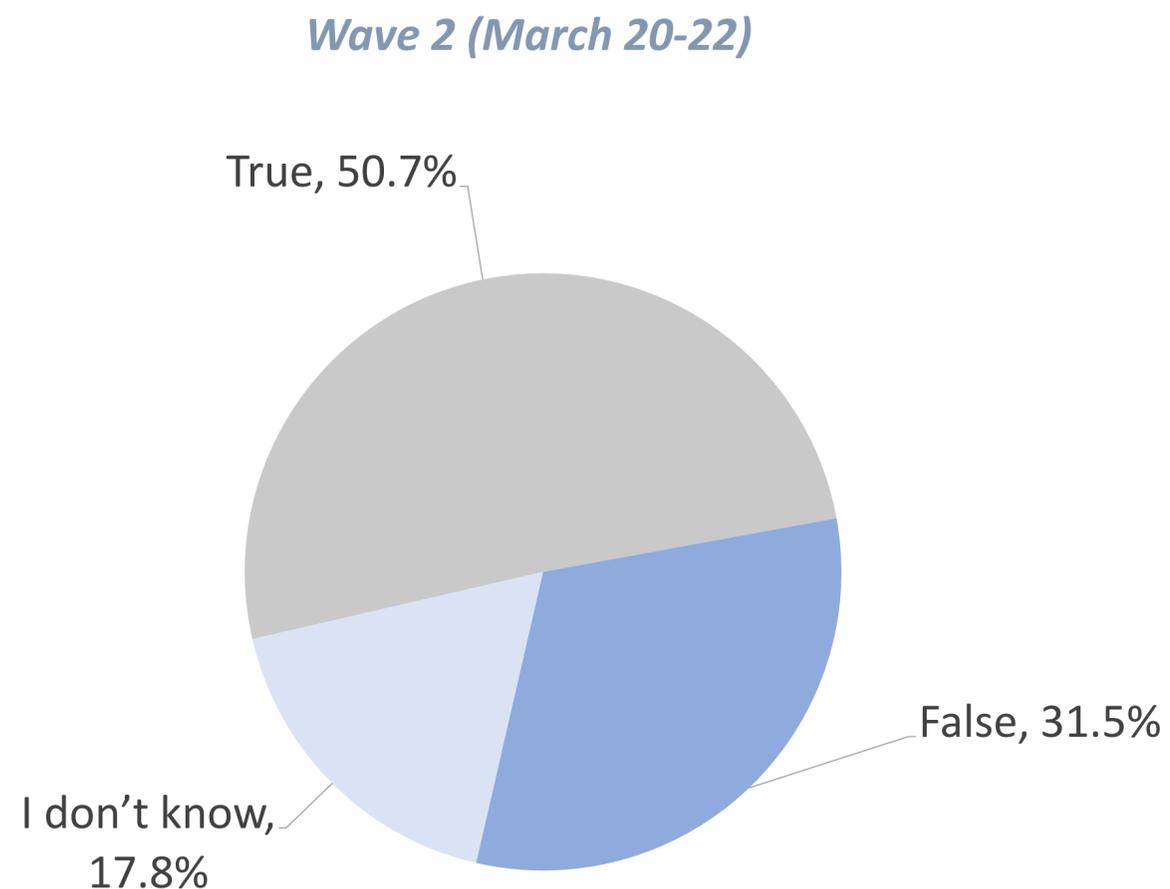
New Question Added in Wave 2 (March 20-22)



Business Travel Restrictions

True or False: My employer has put travel restrictions in place due to the Coronavirus situation.

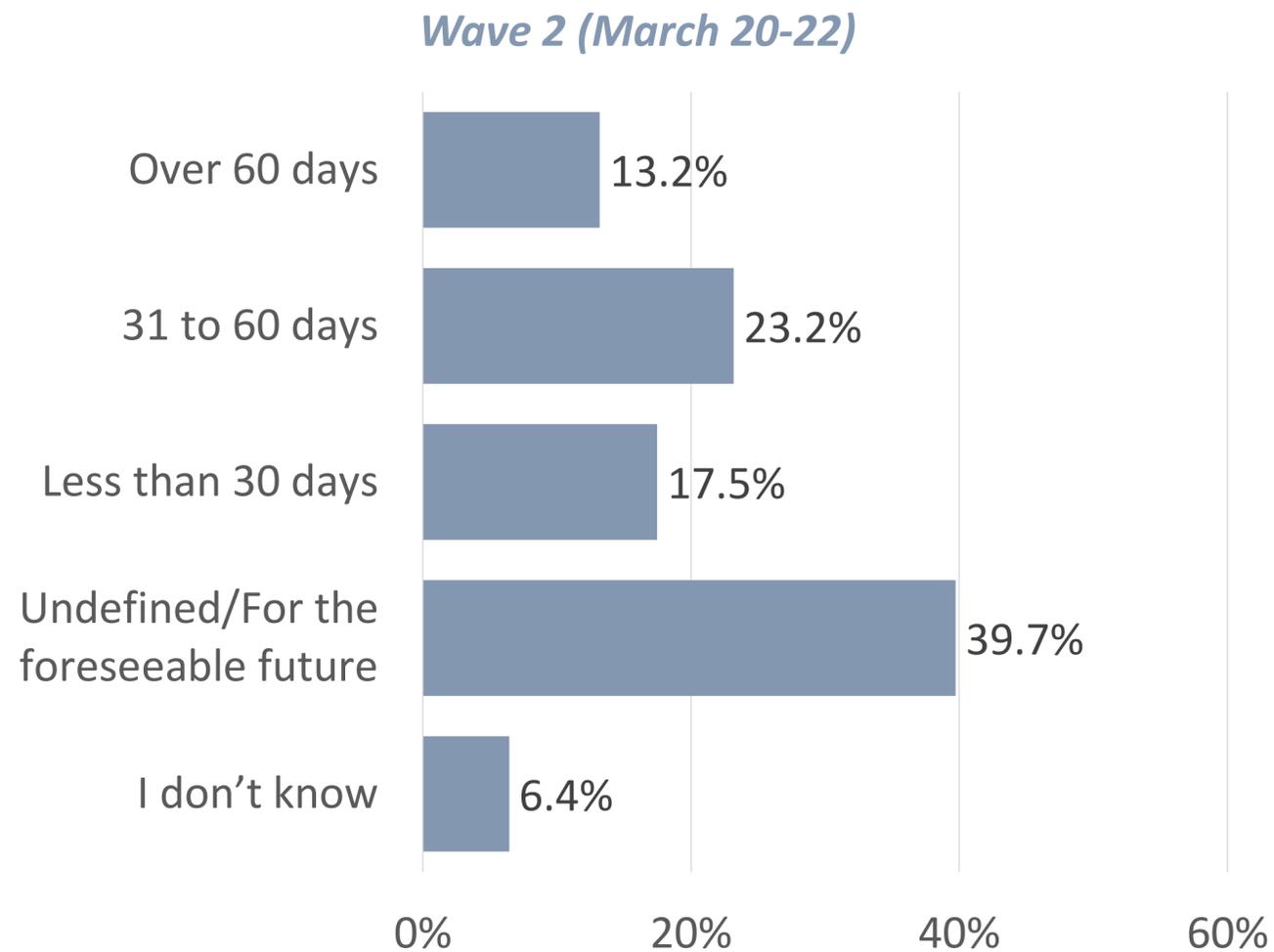
Half of employed American travelers (50.7%) say their employer has put travel restrictions into effect, up slightly from last week.



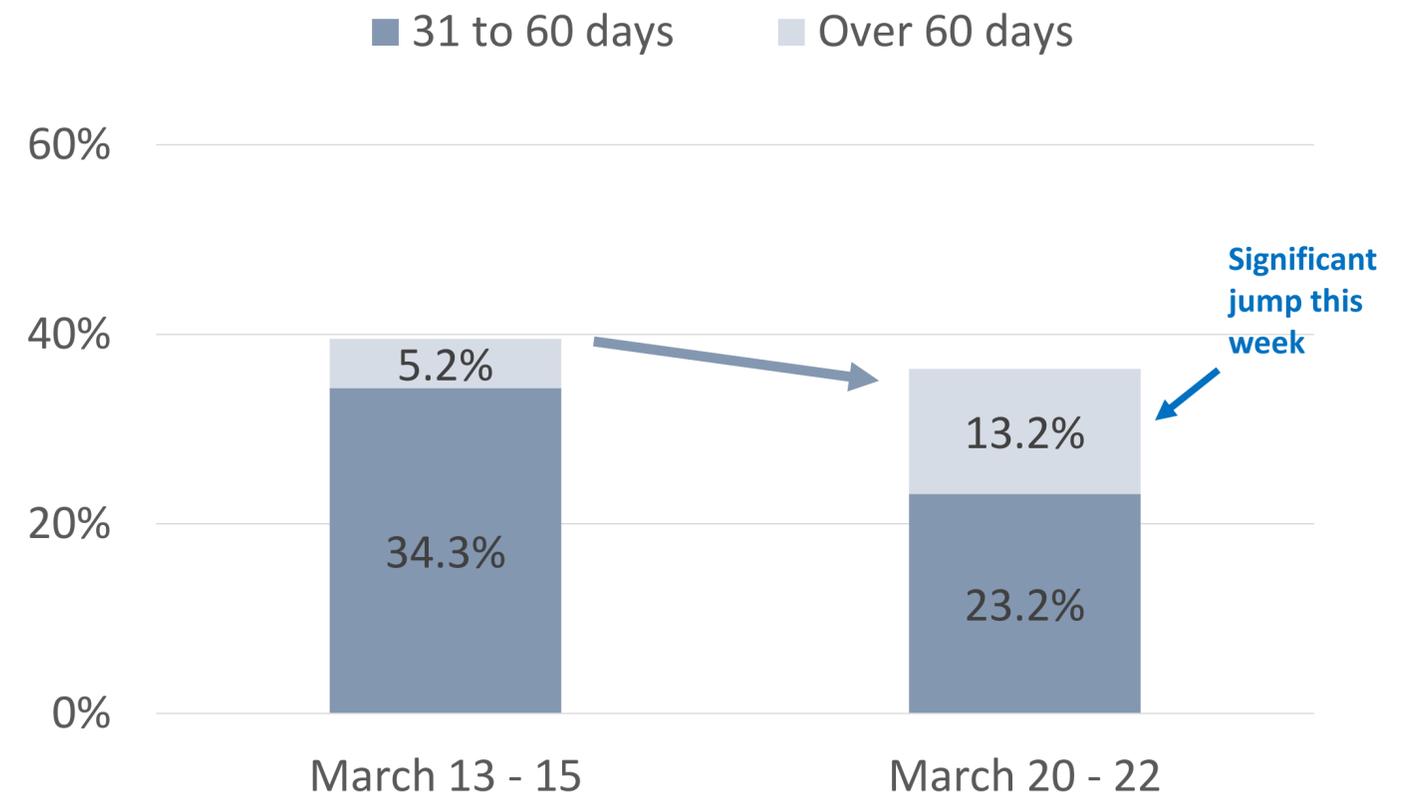
(Base: Employed respondents, 916 and 753 completed surveys. Data collected March 15-17, and March 20-22, 2020)

Business Travel Restrictions

Question: From today, how much longer has your employer said these travel restrictions will be in place? (Select one)



Over a third of employed American travelers with employer-mandated restrictions (36.4%) say they will remain in place for at least a month.



(Base: Employed respondents with travel restrictions, 418 completed surveys. Data collected March 15-17th, 2020)

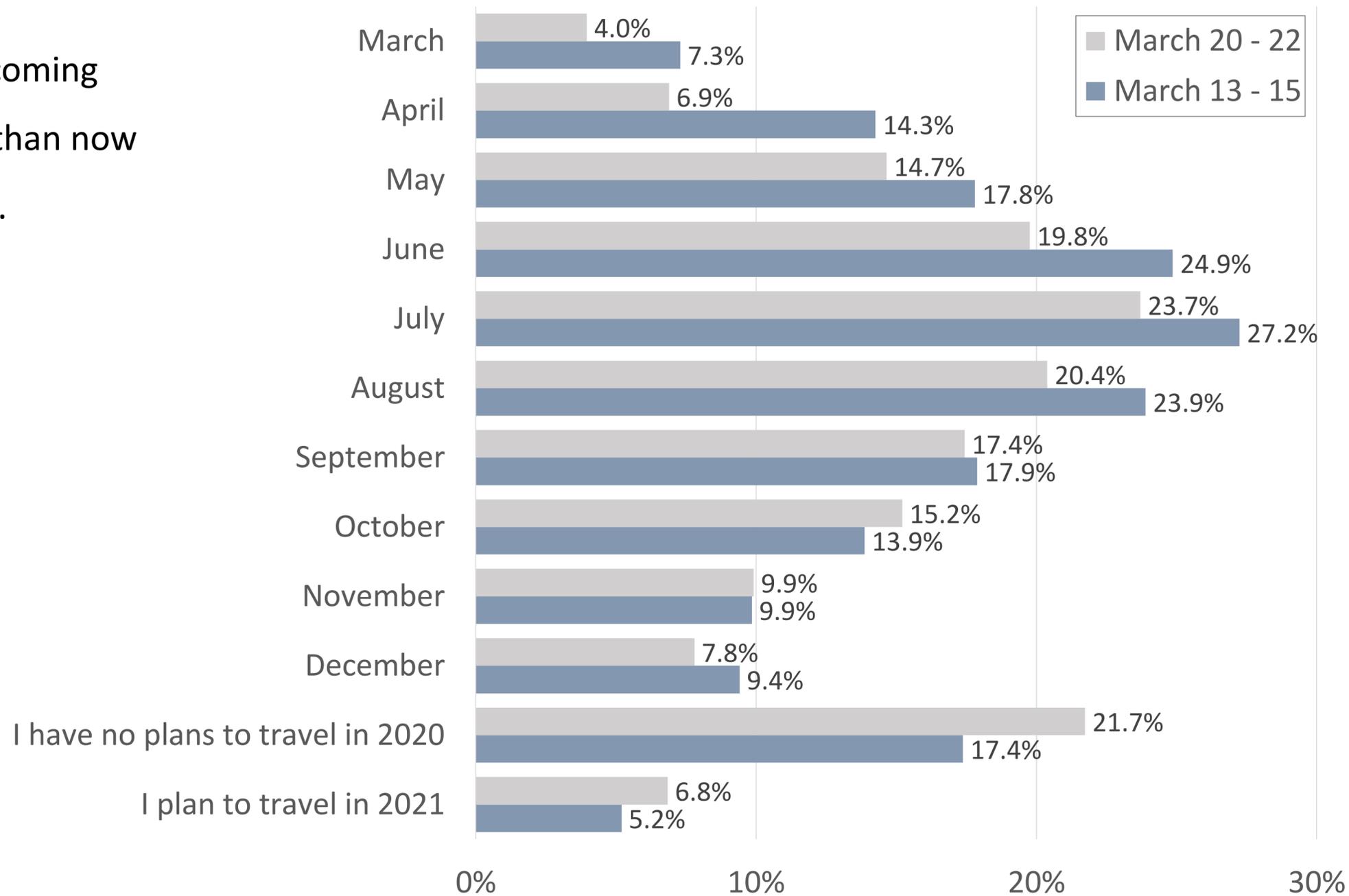
Upcoming Travel Plans

Travel expectations appear to have weakened

somewhat in the past week. For almost all upcoming months, Americans were more likely last week than now to say they at least had tentative plans to travel.

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

(Base: Respondents canceling or postponing a trip, 1,201 completed surveys. Data collected March 15-17th, 2020)

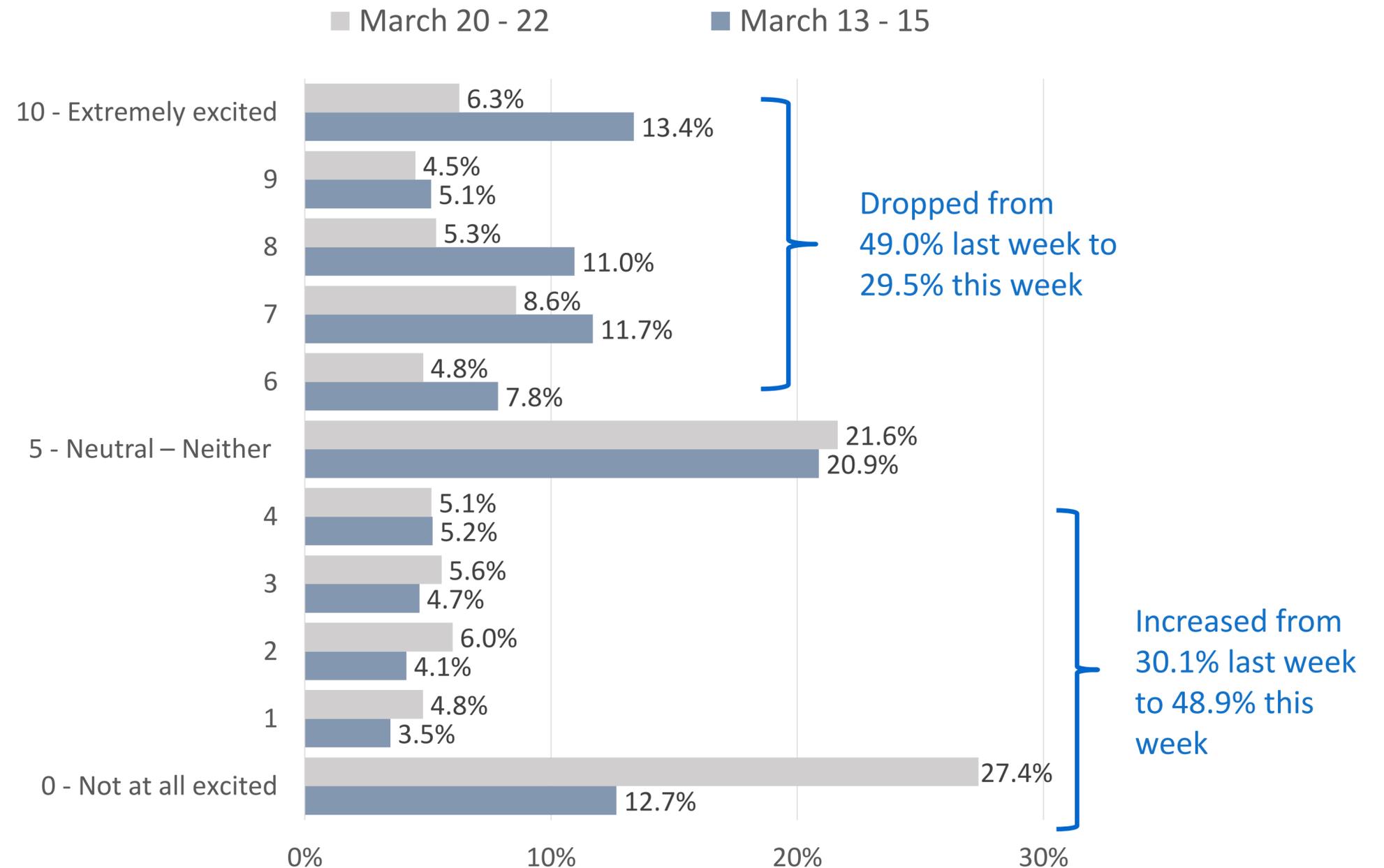


Openness to Travel Information

Travelers interest in learning about new travel experiences and destinations fell sharply this week. Last week, nearly half (49.0%) expressed some excitement about this topic, now only 29.5 percent feel similarly.

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

(Base: All respondents, 1,201 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



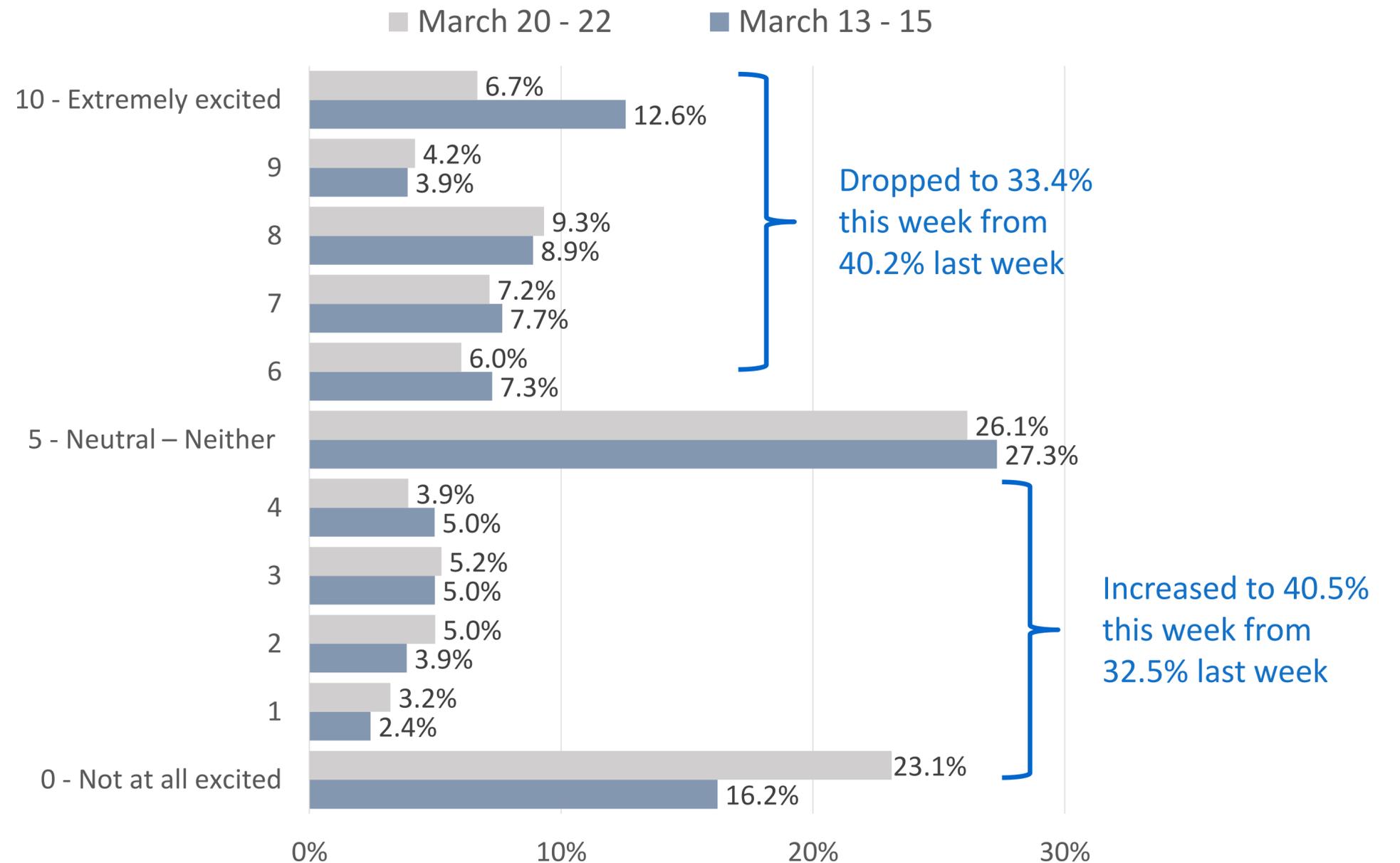
Excitement to Travel Now

Interest in even short trips with loved ones has fallen sharply this week. So much so that 1-in-4 American travelers said they wouldn't be at all excited to take a weekend getaway with a close friend or relative to a place they want to visit next month.

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 and 1,200 completed surveys. Data collected March 13-16 and 20-22, 2020)



Lodging Preferences

Traditional hotels still have a preference edge over home rental services like Airbnb. However, the gap between the two is not huge.

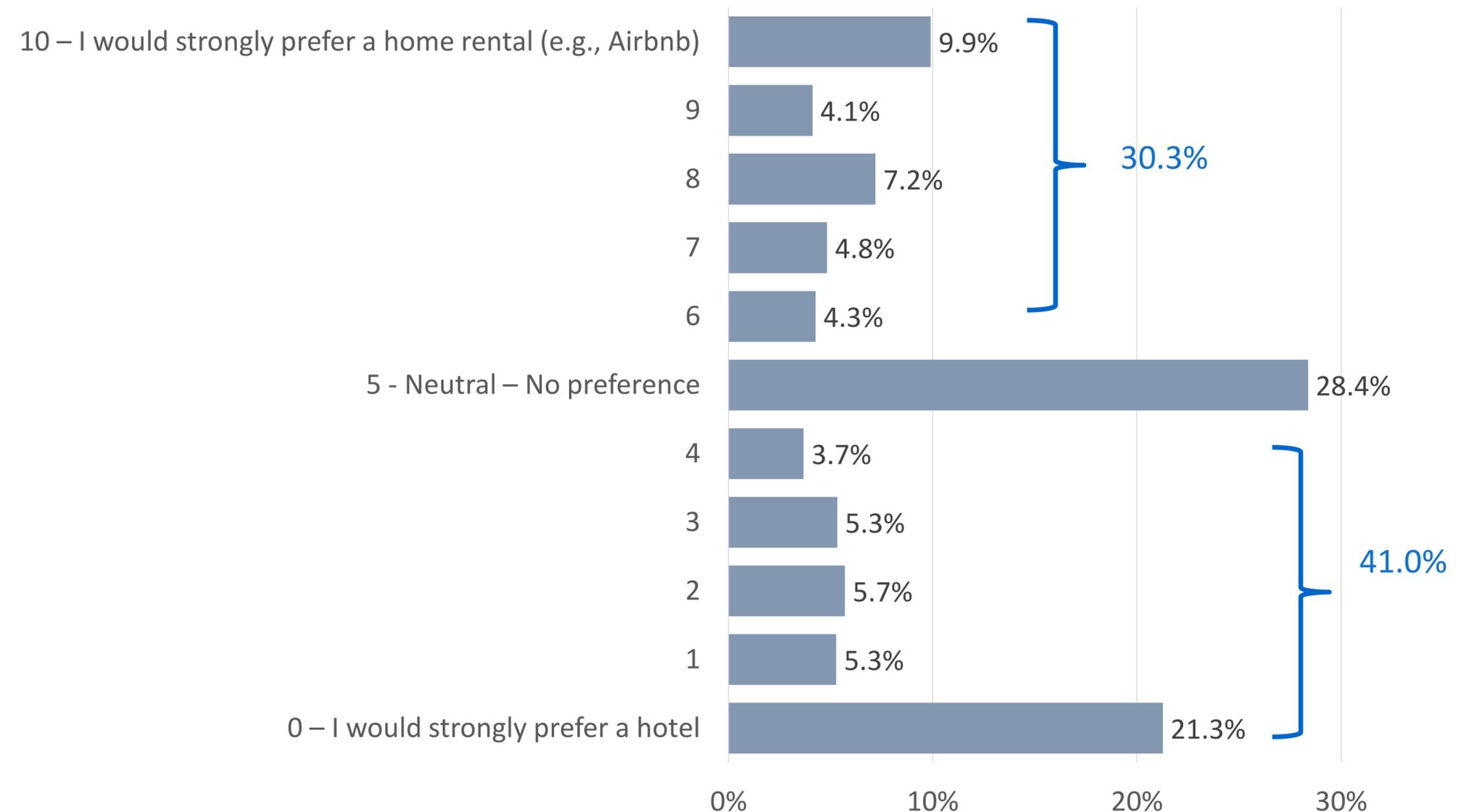
Almost one third of American travelers (30.3%) say they would generally prefer the home rental arrangement.

New Question Added in Wave 2 (March 20-22)

Question: Imagine that you were traveling at some point in the next **THREE (3) MONTHS**.

Would you generally prefer to stay in a hotel or a home rental through a service like Airbnb?

(Base: All respondents 1,200 completed surveys. Data collected 20-22, 2020)



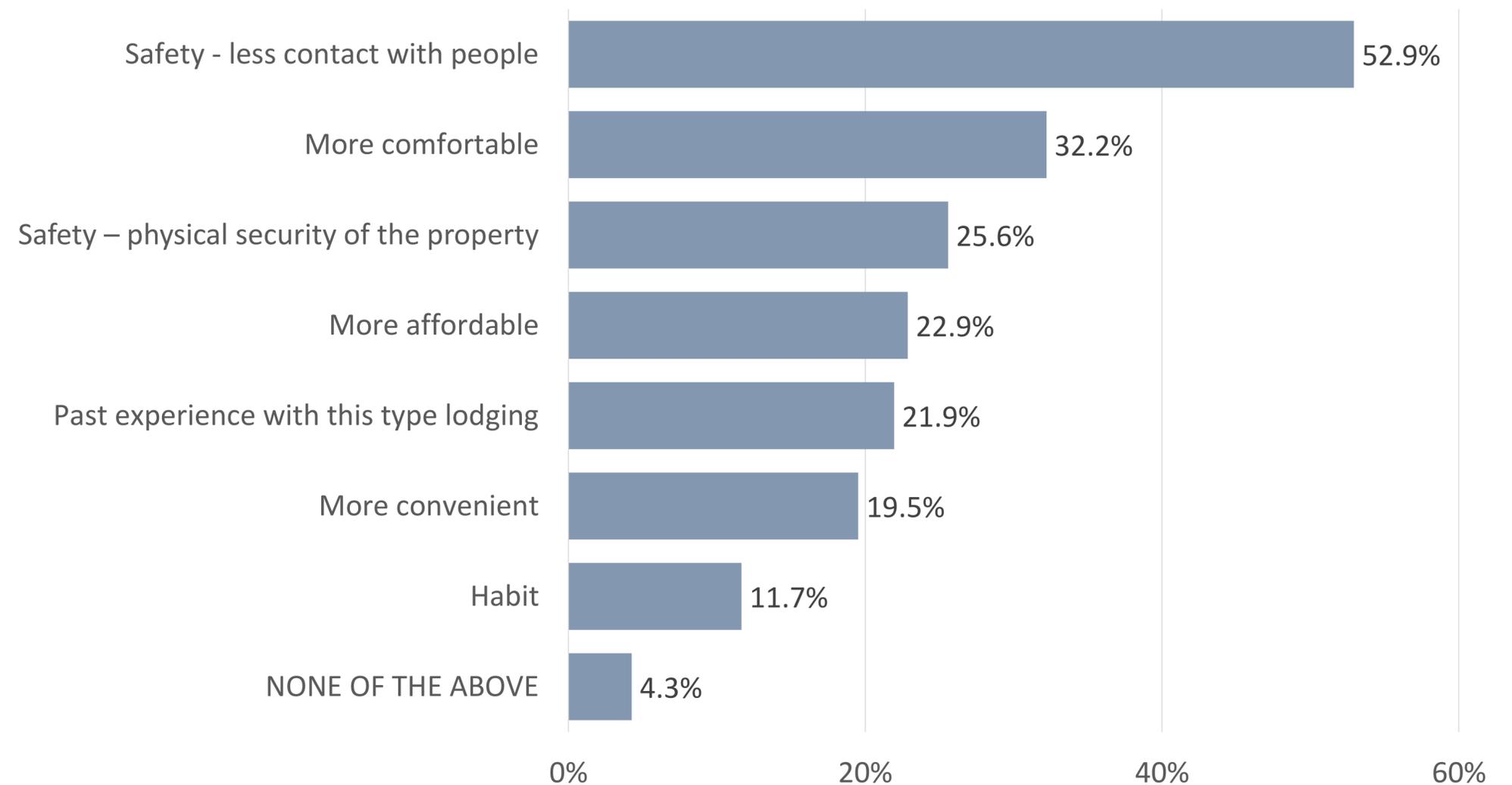
Reason for Lodging Preferences (Home Rental)

Travelers who would prefer home rental accommodations say the primary reason is safety, meaning having less contact with other people.

Question: Why do you have this preference? (A follow-up to the previous question)

(Base: All respondents who would prefer home rental to hotel, 348 completed surveys. Data collected 20-22, 2020)

New Question Added in Wave 2 (March 20-22)



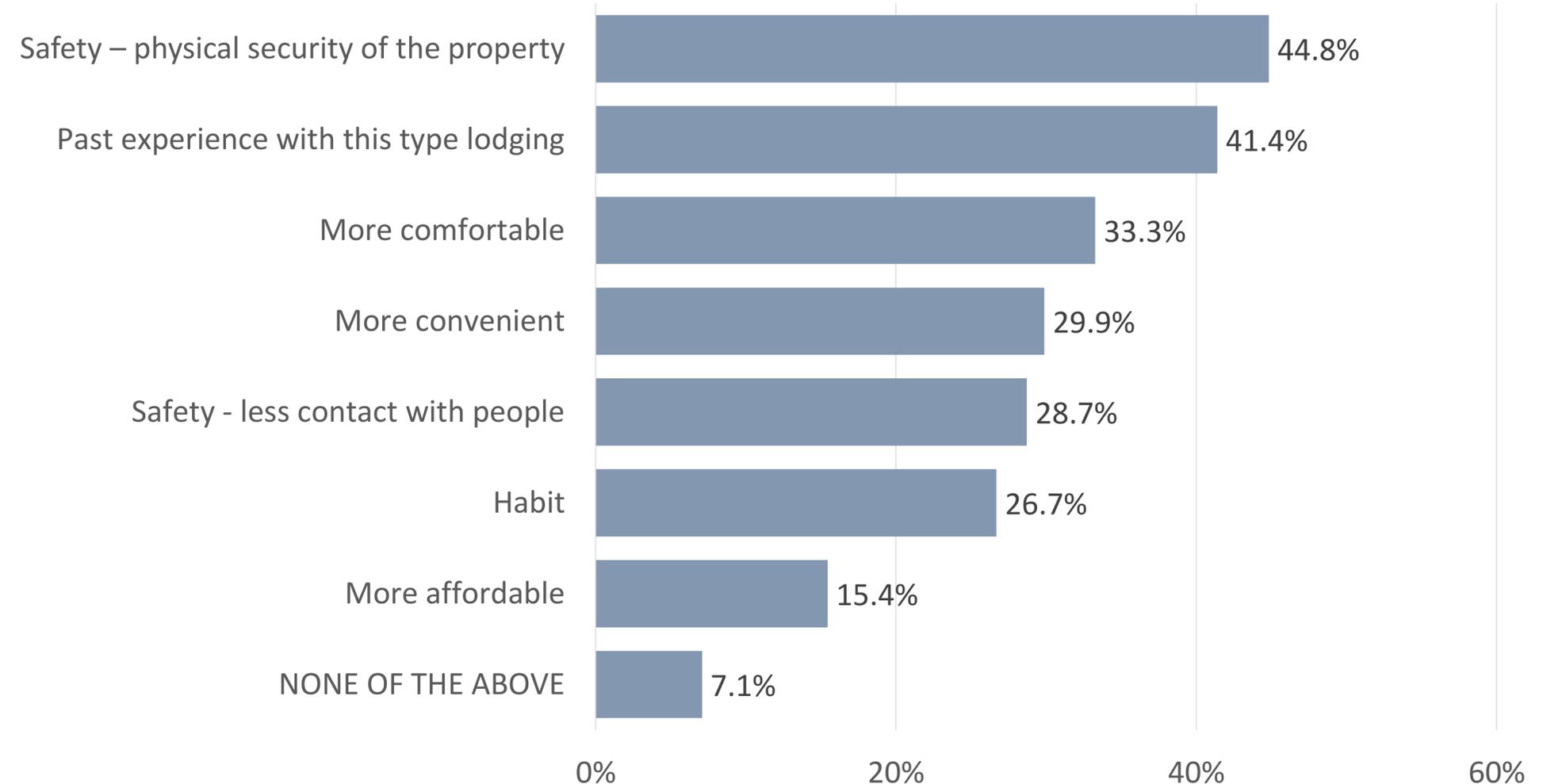
Reason for Lodging Preferences (Home Rental)

In contrast to travelers preferring home rental lodging, those with a preference for hotels rated the physical security of the property as the top reason for their preference. A close second was having had past experience with this type lodging.

Question: Why do you have this preference? (A follow-up to the previous question)

(Base: All respondents who would prefer hotel to home rental, 490 completed surveys. Data collected 20-22, 2020)

New Question Added in Wave 2 (March 20-22)



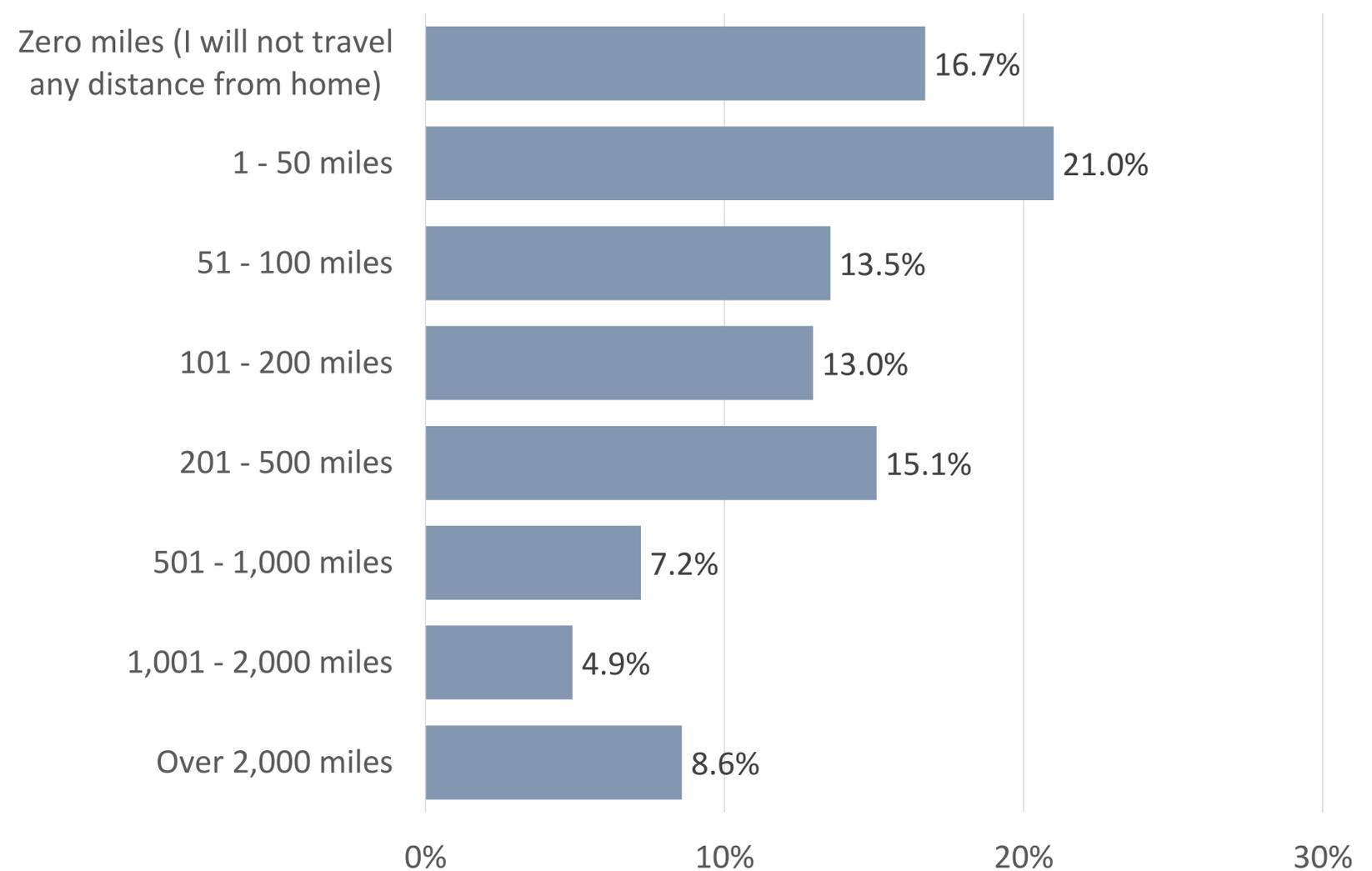
Maximum Travel Thresholds: Distance

American travelers currently show very limited thresholds for travel distance. When asked in the current environment, how far they would be willing to travel from home, nearly 8-in-10 (79.3%) said they would not travel more than 500 miles.

Question: In the current environment, how far away from home (in miles) would you be willing to travel for any reason?

(Base: All respondents 1,200 completed surveys. Data collected 20-22, 2020)

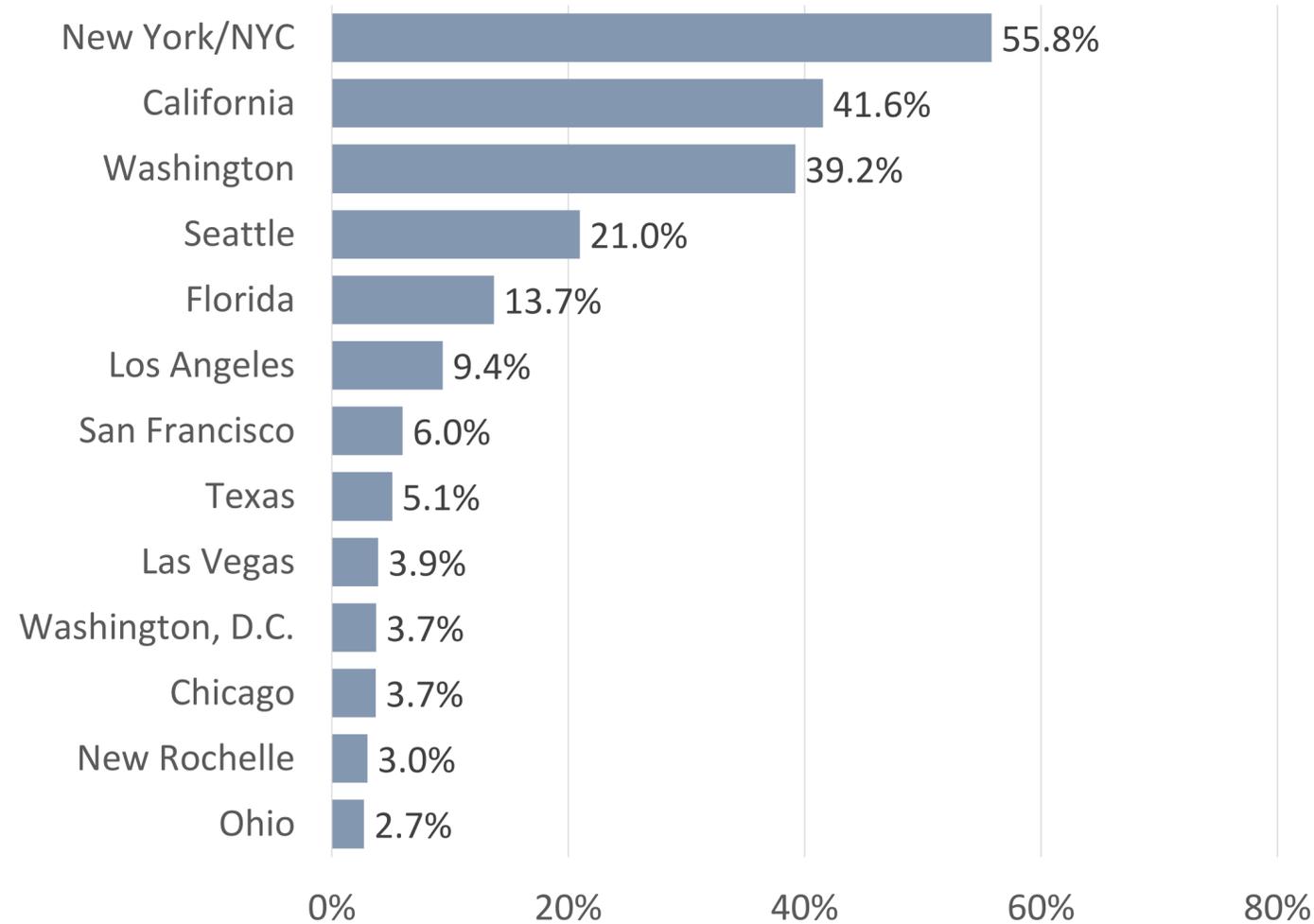
New Question Added in Wave 2 (March 20-22)



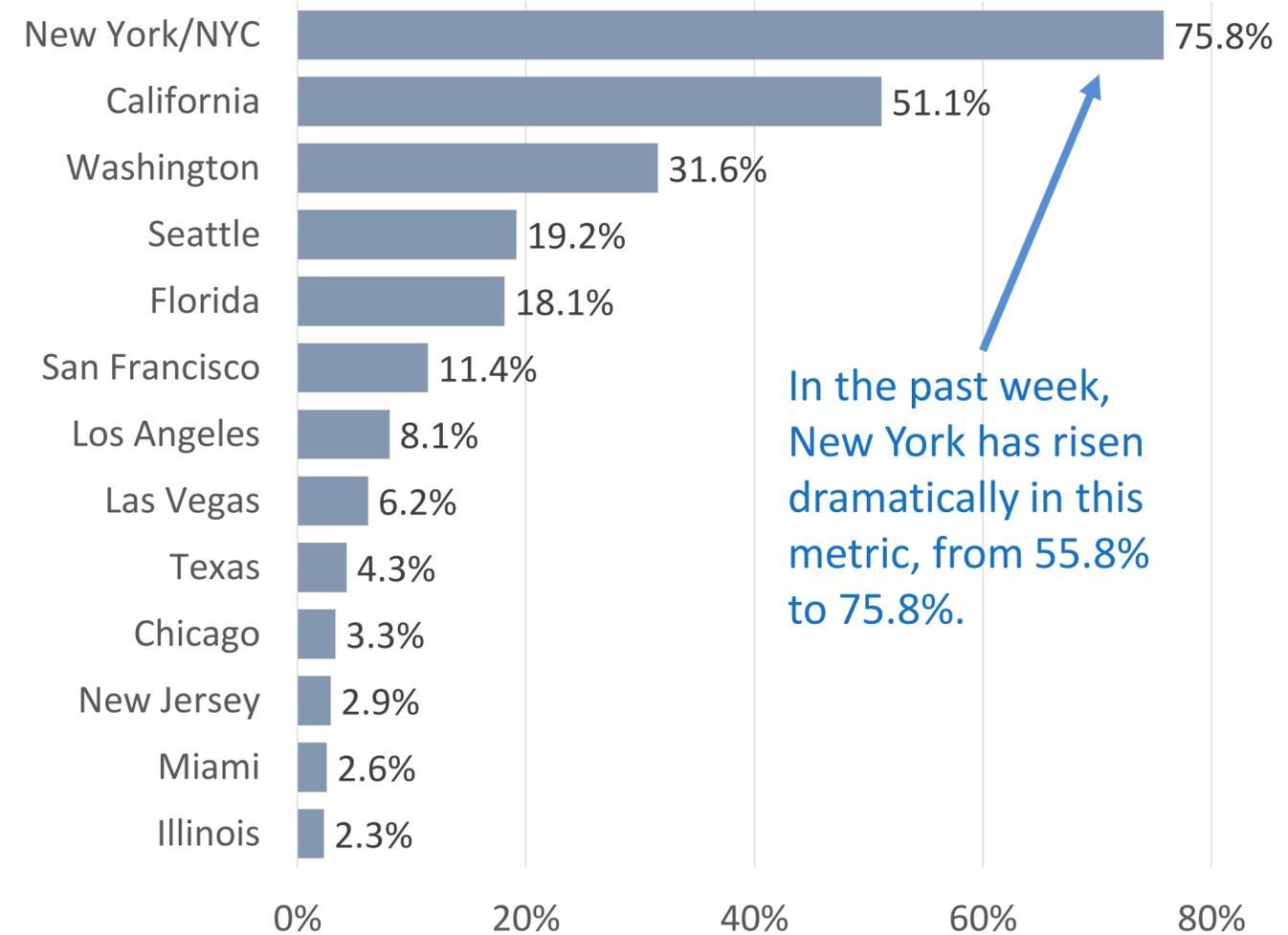
Most Talked About Coronavirus Hotspots

Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with Coronavirus issues?

Wave 1 (March 15-17)



Wave 1 (March 20-22)



In the past week, New York has risen dramatically in this metric, from 55.8% to 75.8%.

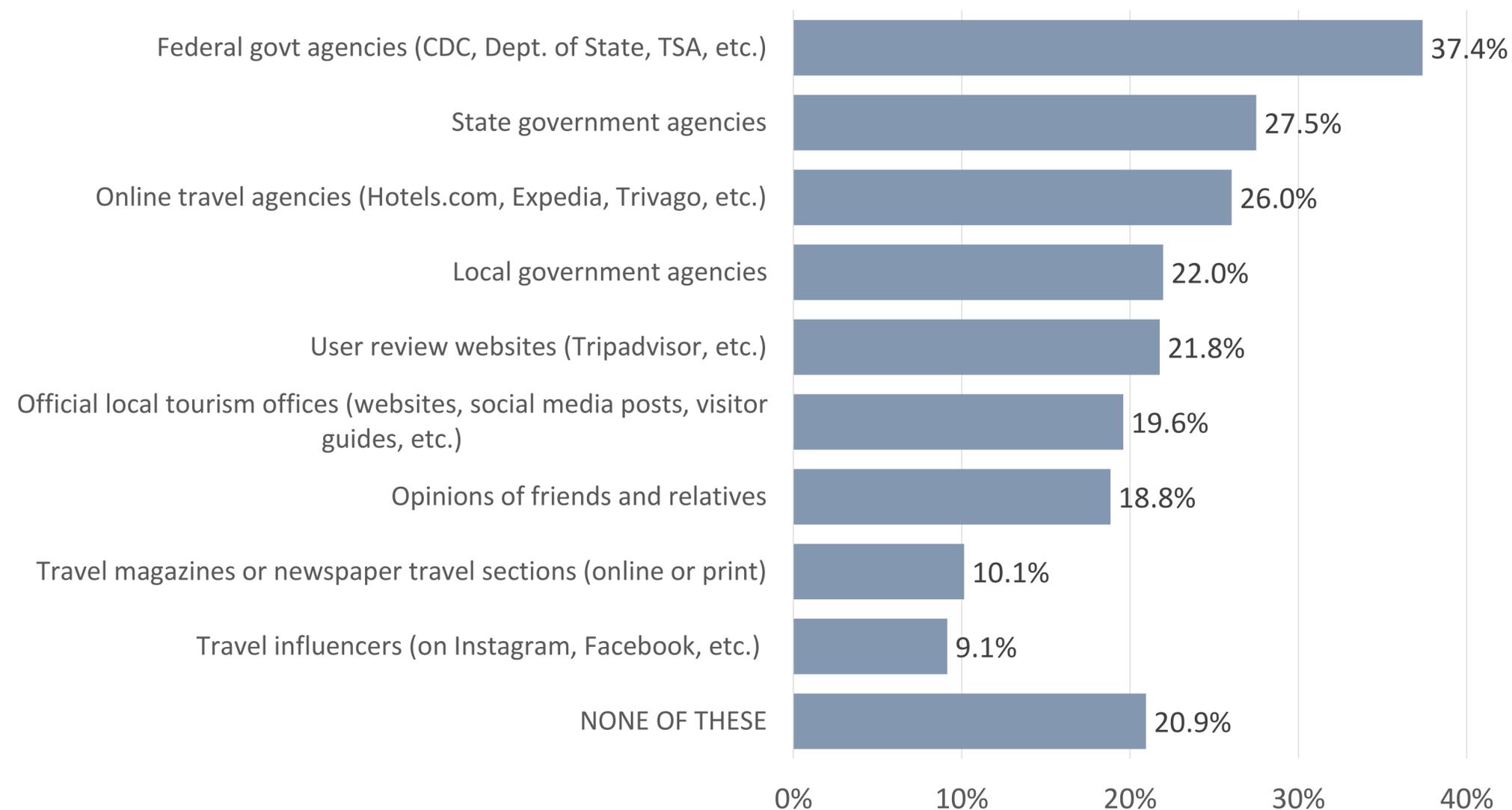
Resources to Use for Travel Planning in Next 3 Months

The resources travelers say they would currently use to plan a trip illustrate the profound uncertainties they face. The most commonly selected resource was federal government agencies. Word of mouth, typically the most relied on resource by travelers, was only selected by 18.8 percent of travelers.

Question: If you were to travel in the NEXT THREE (3) MONTHS, which of these resources would you use to prepare for your travels?

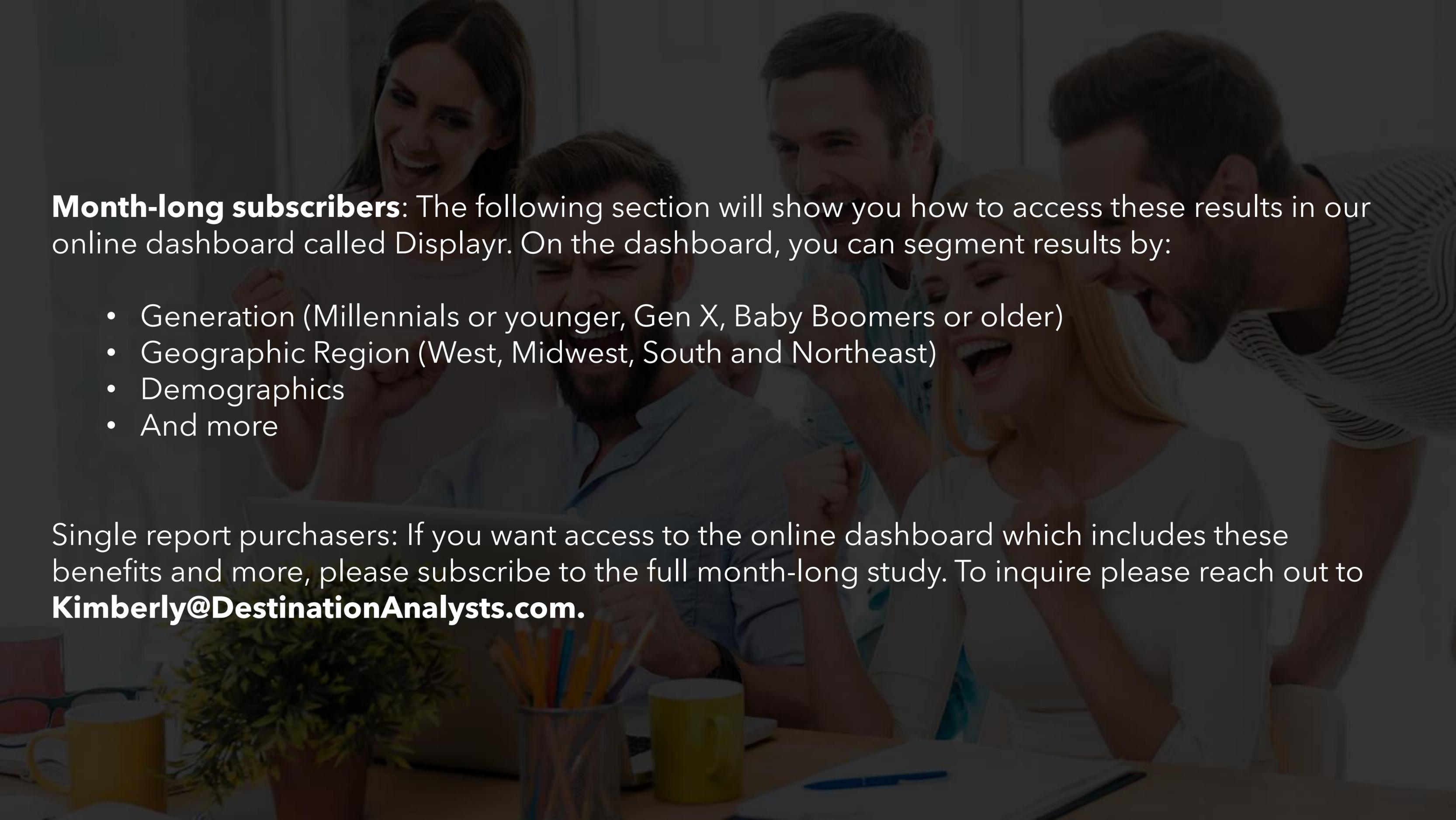
(Base: All respondents 1,200 completed surveys. Data collected 20-22, 2020)

New Question Added in Wave 2 (March 20-22)





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.



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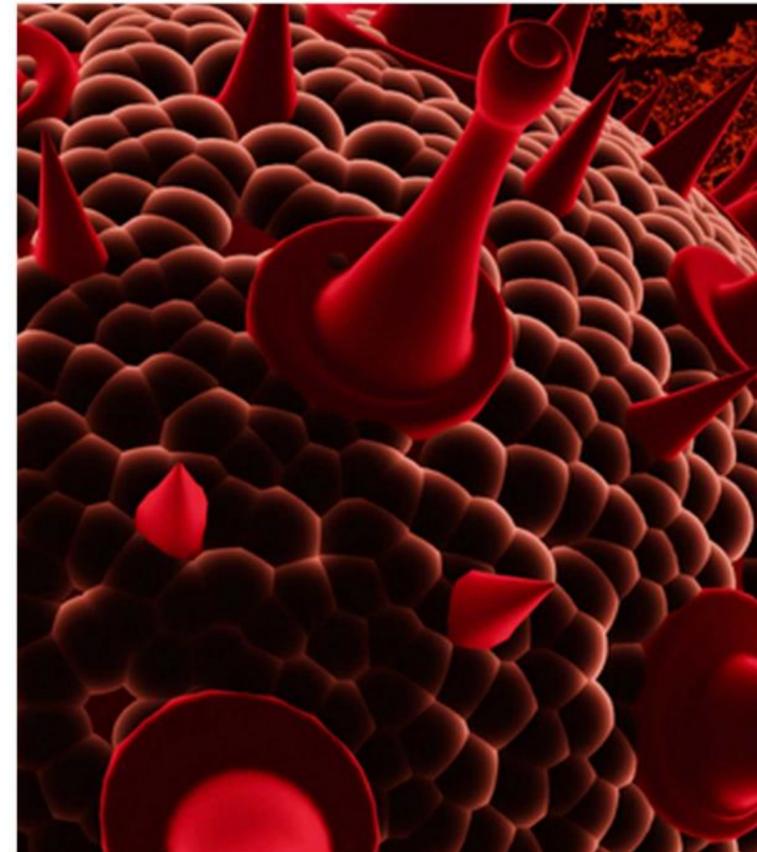
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FTR	-0.23	▼	-2.34%
CSCO	-1.01	▼	-1.89%
CHK	0.02	▲	+0.21%
AAPL	+2.58	▲	+3.05%
PRT0	-0.14	▼	-1.42%
AMZN	-0.73	▼	-0.90%
TSLA	+1.08	▲	+5.12%
AVGO	-0.87	▼	-3.88%
SIRI	-0.65	▼	-1.37%

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



Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

Search...

Filters ▾ Export ▾ ?

- + 65%

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 ? 65%

- 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.

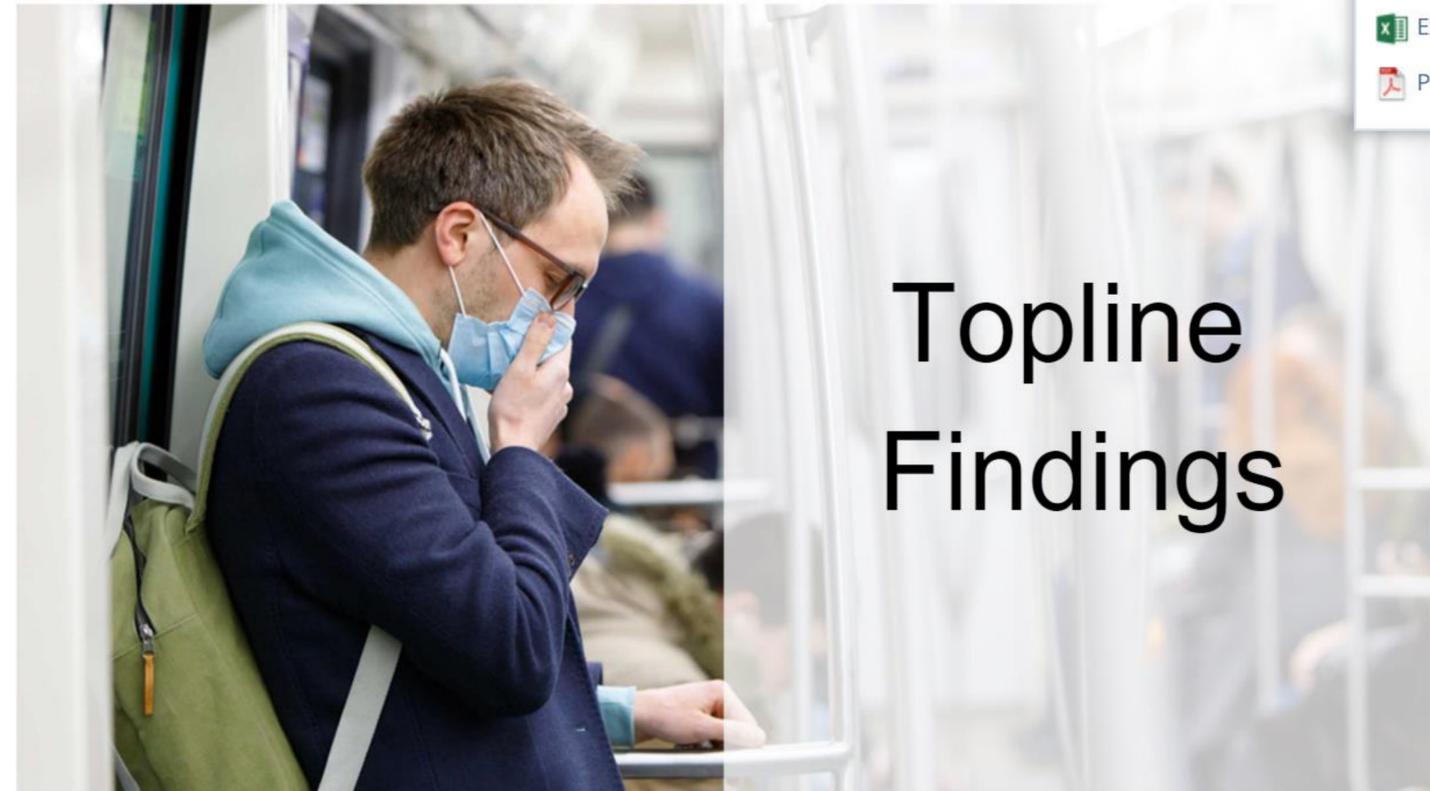
EXPORTING THE DATA:

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).

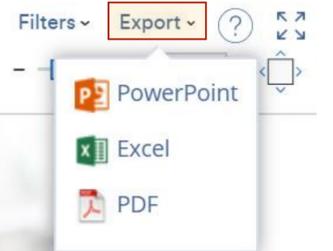
If you want to export a specific report section, be sure to select it in the navigation pane BEFORE you click "Export"

Coronavirus Travel Sentiment Index Report

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



Topline Findings

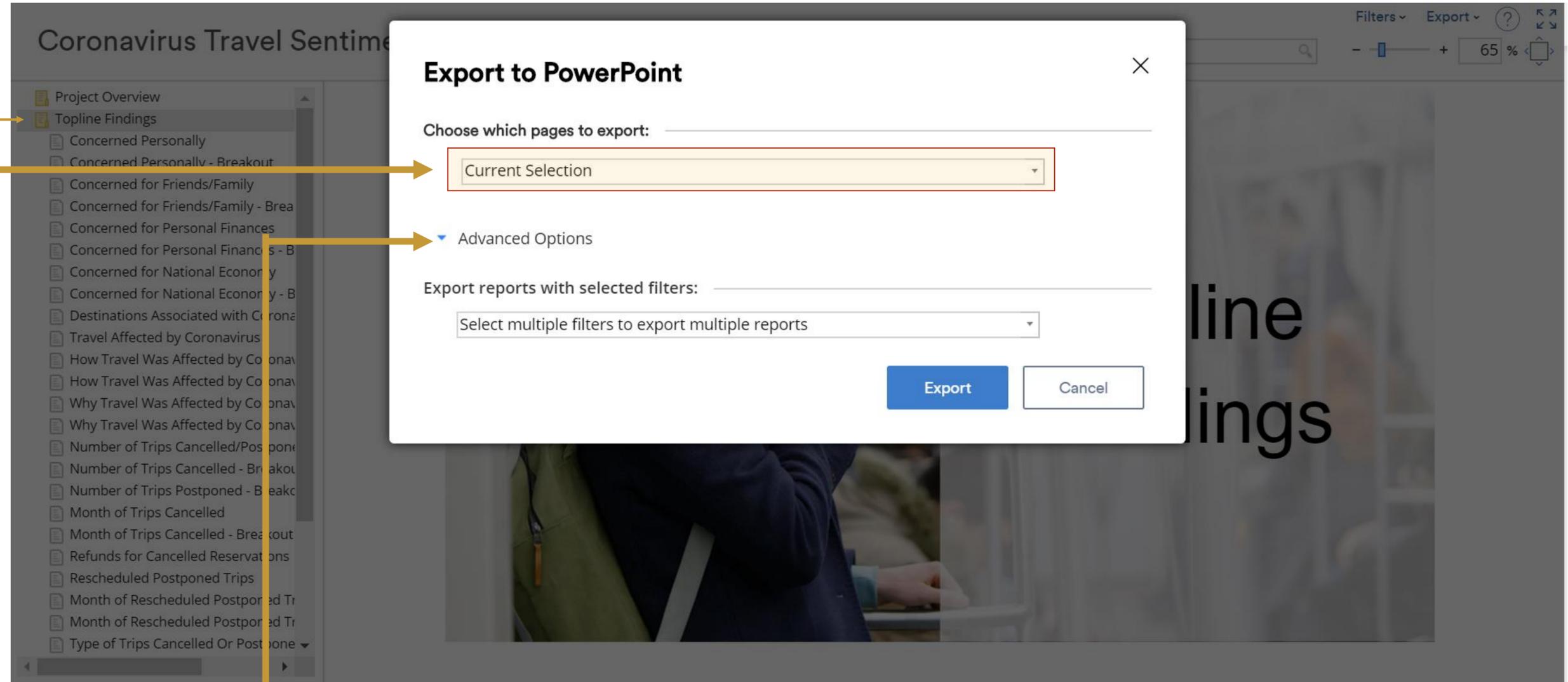


EXPORTING THE DATA:

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:

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Research Manager

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(415) 722-2503

