

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 3

RESEARCH FINDINGS

March 29, 2020

Destination  Analysts

TABLE OF CONTENTS

Project Overview	3
Key Findings	5
Current Feelings About Travel	12
Impact on Travel	22
Opinions on Travel & the Coronavirus	37
Data Tables	61

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 first 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 third wave of this survey was collected from March 27-29, from a demographically representation 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, 1,201 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



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Project Overview

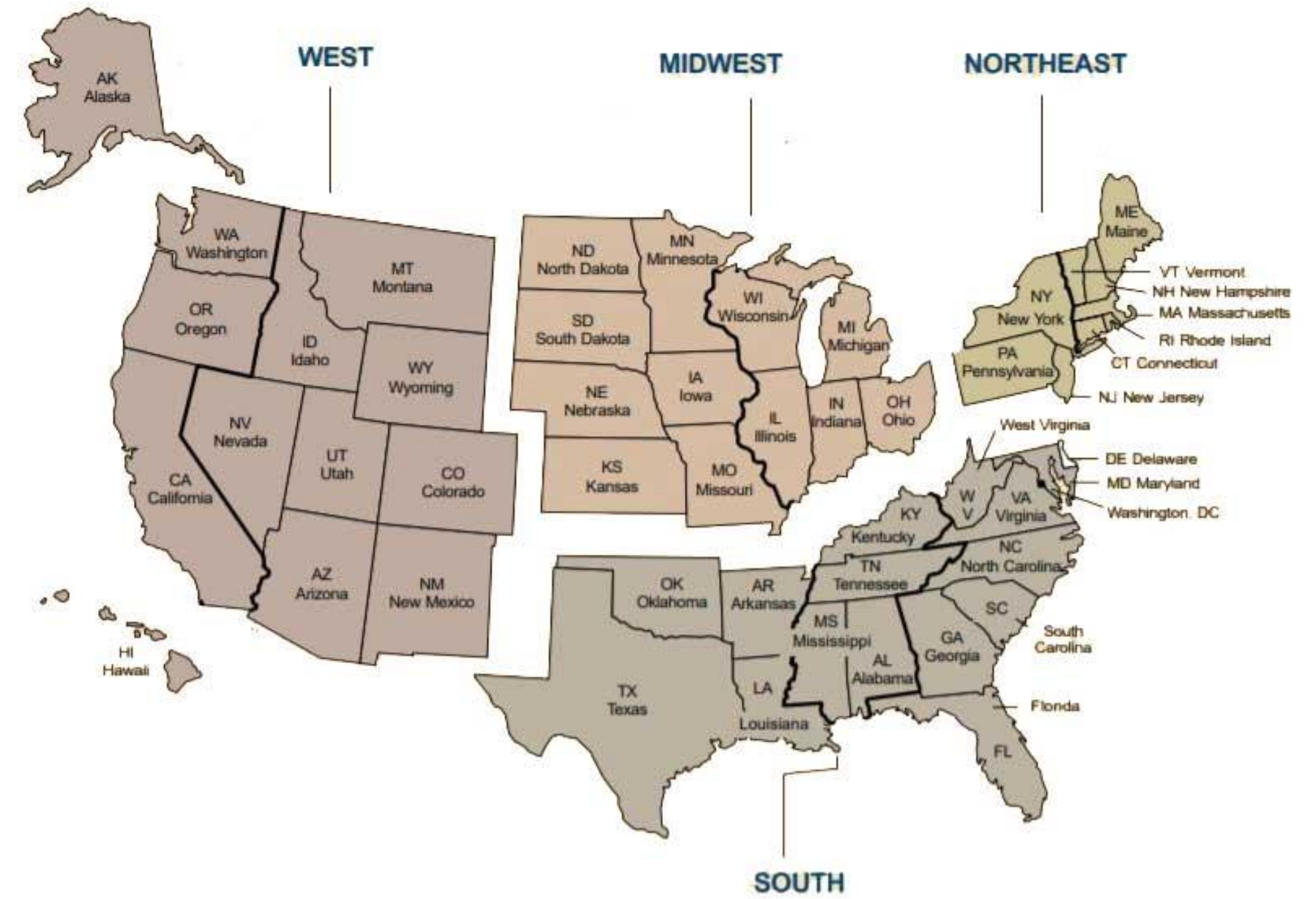
Data weighting. The survey sampling plan used in this project collected 300 fully-completed surveys in each of the four regions shown in the map at right. The overall results presented in this report are weighted to reflect the actual populations of the regions.

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



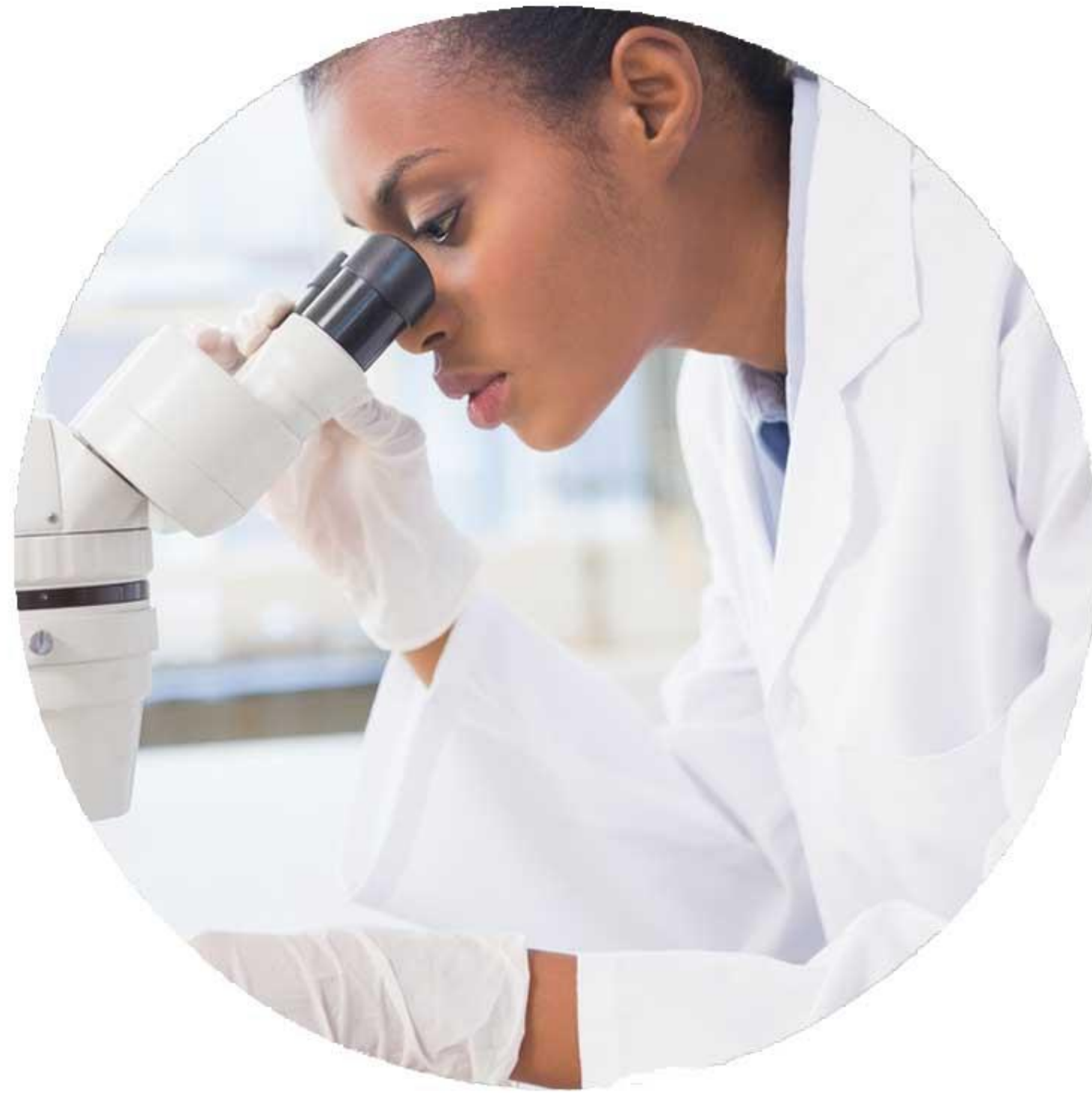
Key Findings

This first wave of this consumer sentiment project sets benchmarks to examine evolving traveler sentiment around the COVID-19 pandemic. The following key finding emerged:

- **Health concerns continue to grow.** Traveler concern about personally contracting the Coronavirus has increased again this week, but at a reduced pace. In total, 75.6 percent of survey respondents now say they have some level of concern about contracting the virus, up from 71.6 percent last week. Travelers continue to be even more concerned about the health of their friends and family than themselves, with 81.8 percent expressing concern for the safety of their loved ones, up slightly from 79.1 percent last week.
- **Economics concerns eased slightly this week.** Now, 68.3 percent of American travelers are concerned that the pandemic will impact their personal finances. This is down slightly from 70.2 percent last week. National economic concerns continue to be high. Nearly 86 percent of travelers expressed some level of concern for the national economy.



Key Findings



- **Stronger feelings of danger associated with travel.** Cruise and foreign travel continue to be seen as the least safe travel activities. Attending a convention or conference is considered to be “Somewhat unsafe” by 21.3 percent and “Very unsafe” by 60.8 percent of travelers.
- **Travel still excites many.** In a positive sign for a quick turn-around after the outbreak subsides, nearly 2-in-3 American travelers (63.1%) agree that they miss traveling and can’t wait to get out and travel again.
- **The impact gets worse.** In the current survey wave, the proportion of American travelers who reported having their travels impacted by the coronavirus grew slightly to 66.1 percent. This week, 59.7 percent of travelers said they had cancelled a trip, compared to 63.0 percent last week. Postponements were up to 53.0% this week, from 46.7 percent last week.
- **Safety is everything.** This week, concerns about personal safety again topped the reasons expressed for why Americans have changed their travels, with 2-of-3 respondents (65.6%) citing it as a reason.

Key Findings

- **Cancelling short-term, some longer-term, too.** The average American traveler says they have cancelled 1.9 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.7 trips due to the crisis. The majority of travel cancellations appear to be near-term bookings, but we note continued increases this wave in June and July trips being canceled.
- **Are they being postponed or cancelled?** About 7-of-10 of postponed trips (71.2%) are now not being rescheduled. Postponement windows may be lengthening after an initial period of optimism. This week saw a big jump in the proportion of travelers rescheduling trips who said they would take that trip now in August. All types of trips are being cancelled, with the most common type of cancellation being vacations. This week, 32.7 percent of those cancelling a trip did so for a vacation.
- **More travelers continue to be fully refunded for cancelled trips.** This week, 63.7 percent report receiving full refunds, compared to 60.9 percent last week.



Key Findings



- **Most believe things will get worse.** This week, traveler expectations for the future of the virus situation were unchanged. Again, 2-in-3 travelers expect the Coronavirus situation to get worse in the next month. Now, 82.8 percent of American travelers say they are done traveling until the Coronavirus situation blows over.
- **Will travel rebound this summer?** Last week about a third of travelers (37.5%) saw the Coronavirus situation resolving itself before summer. Similarly, this week about 4-in-10 (39.3%) agree.
- **Summer will be staycation season for some.** About half of American travelers are considering switching to a staycation (from a vacation) this summer as a result of the coronavirus. One week ago, 47.3 percent “Agreed” or “Strongly agreed” that they’d probably take a staycation rather than a vacation. The figure is now 49.2 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 from last week.

Key Findings

- **Region trips are more attractive.** 47.7 percent of American travelers “Agree” or “Strongly agree” that they’ll probably be taking more regional trips while avoiding long-haul trips. This result has changed little over the three waves of this project.
- **Enthusiasm for attending meetings in the current environment is extremely low.** Nearly 8-in-10 travelers (77.5%) now say they will be unlikely to attend these events until the Coronavirus situation is over.
- **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, unchanged from last week.
- **If we’re not secure at home, how can we be on the road?.** American’s comfort in going out in their own communities to enjoy themselves is steadily declining. Last week just over one quarter (28.8%) of American travelers said the felt comfortable doing this. Now just over 1-in-5 (22.3%) agree.
- **Less interest in discounted travel product.** Price cuts and discounts to stimulate travel resonate with approximately 1-in-3 American travelers. When asked if price cutting made traveling in the next three months more interesting, 32.4 percent now agree.



Key Findings



- Half of Americans (51.3%) feel that persons traveling now should be feel ashamed of this behavior. Only 17.2 percent disagree.
- More than half of American travelers (55.4%) say they have been taking action to try to support local businesses where they live.
- Over half of employed American travelers (54.1%) say their employer has put travel restrictions into effect, up from last week.
- Over a third of employed American travelers with employer-mandated restrictions (39.0%) say they will remain in place for at least a month.
- 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 remains the same. This week, 1-in-3 travelers (33.8%) expressed some excitement about this topic. Interest in even short trips is stable. Nearly 1-in-3 American travelers (30.8%) 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

- 16.0% of employed American travelers have used vacation or PTO time to deal with the coronavirus situation. In total, 7.5% of employed American travelers will be less likely to travel in the near future due to having used such vacation or PTO time.
- 60.4% of American travelers have some investments in stocks or mutual funds. As 36.7 percent of these persons say the recent declines in stock prices will make them less likely to travel in the next six months, this implies that 1-in-5 travelers (22.2%) feel that this stock market volatility makes them less likely to travel in the upcoming months.





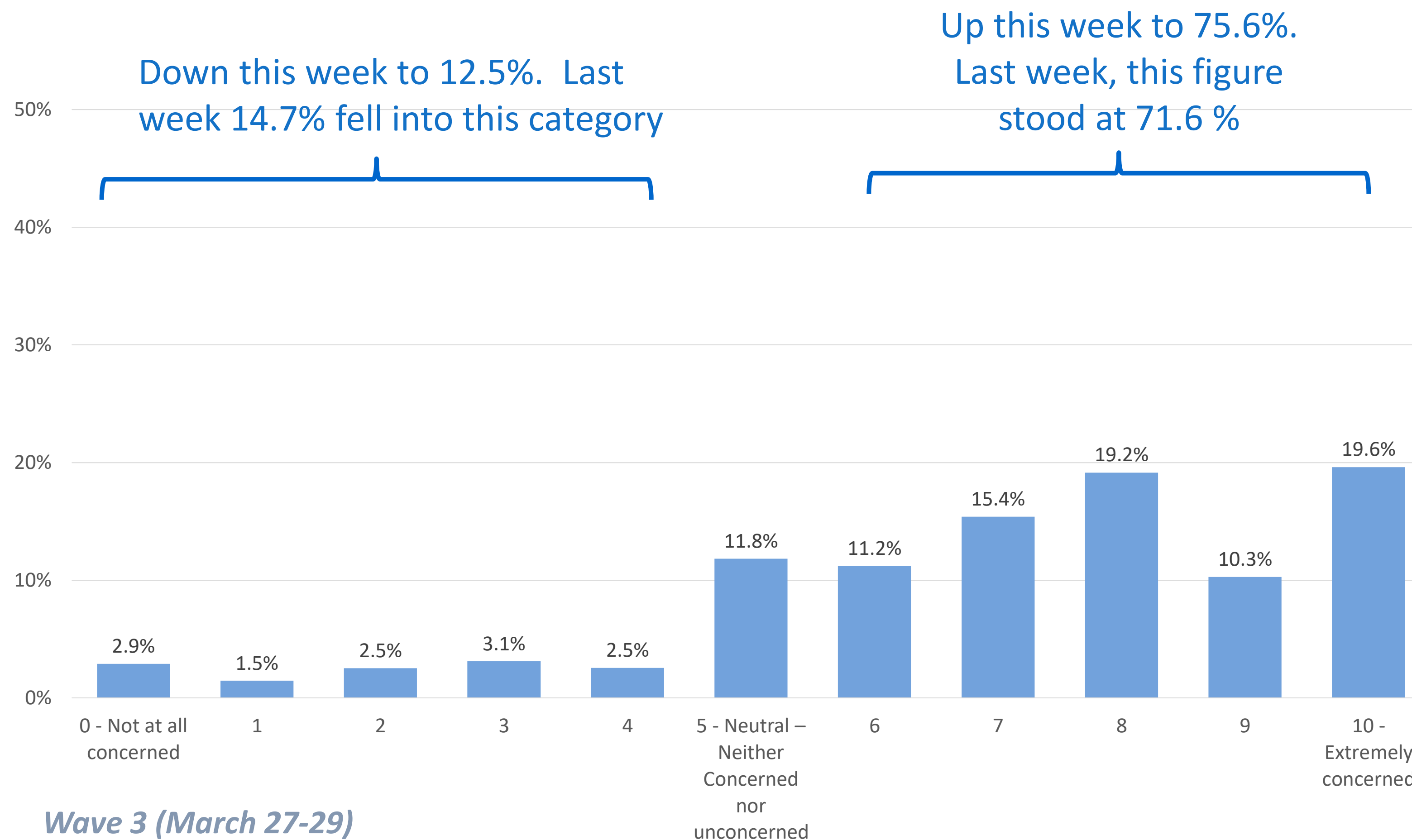
**Section I:
Current Feelings
About Travel**



Personal Health Concerns

Traveler concern about personally contracting the Coronavirus has increased again this week, but at a reduced pace. In total, 75.6 percent of survey respondents now say they have some level of concern about contracting the virus, up from 71.6 percent last week.

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

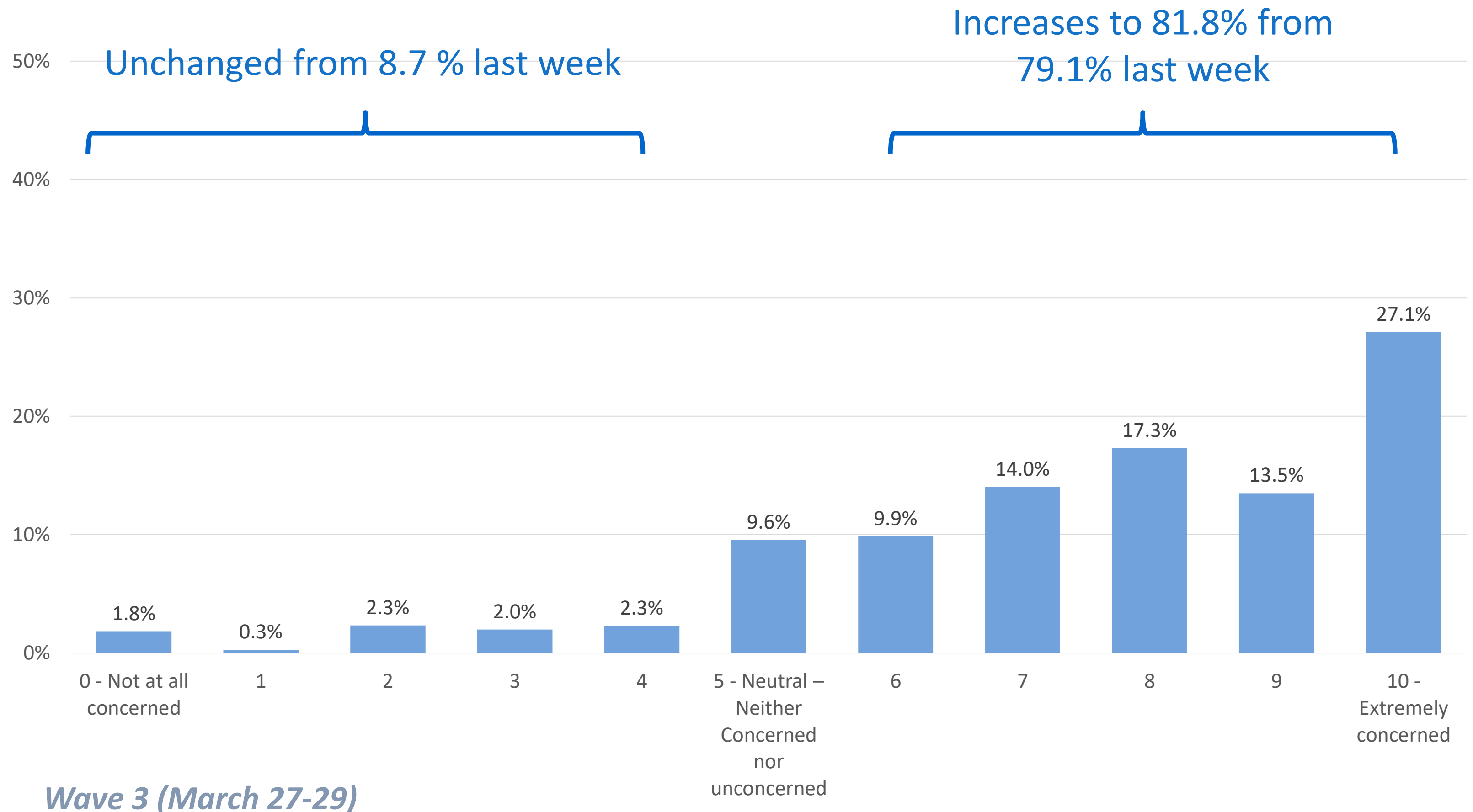


(Base: Wave 3 data. All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)

Health Concerns (Family & Friends)

Travelers continue to be even more concerned about the health of their friends and family than themselves, with 81.8 percent expressing concern for the safety of their loved ones, up slightly from 79.1 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)

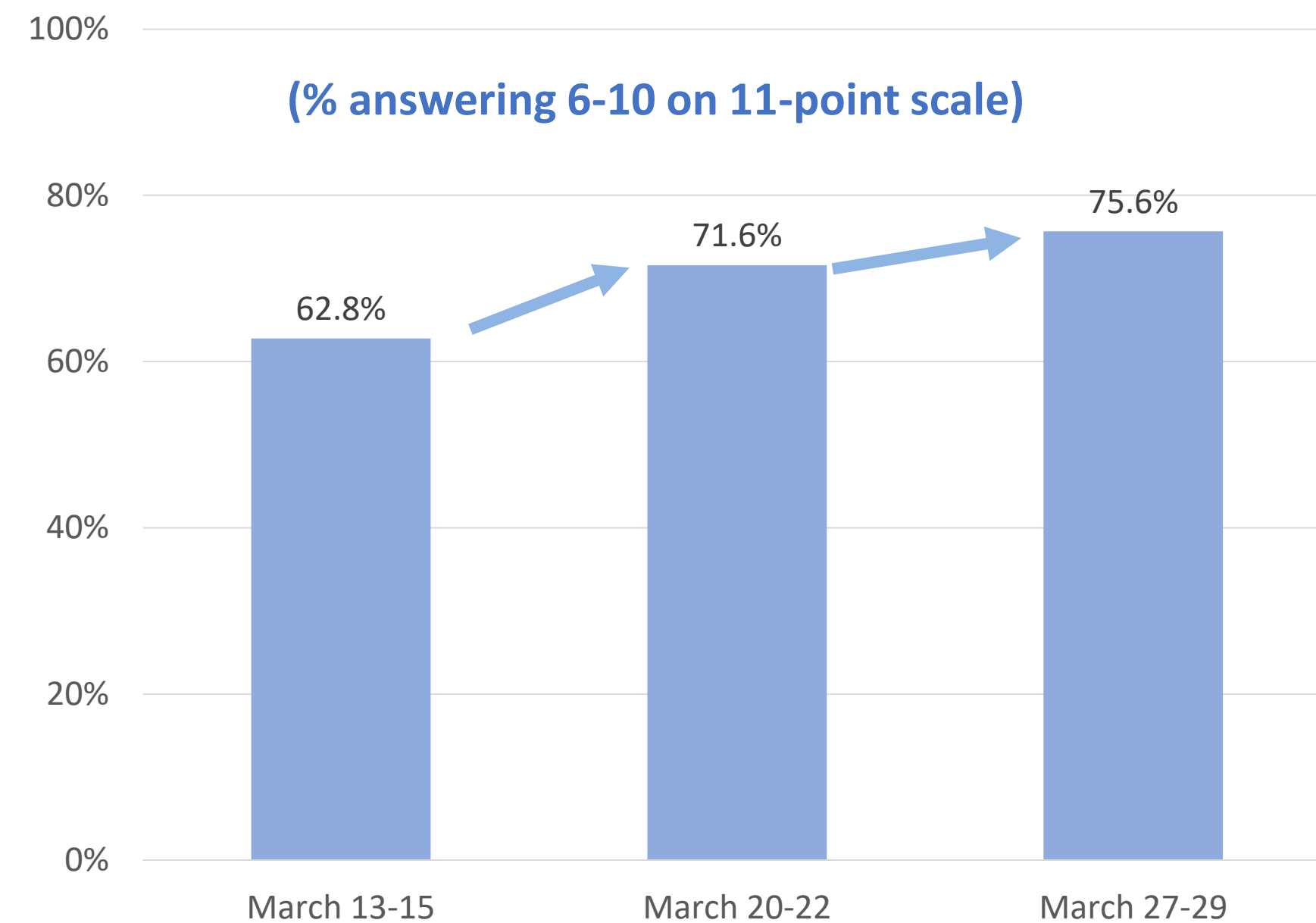


(Base: Wave 3 data. All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)

Summary: Safety Concern Metrics

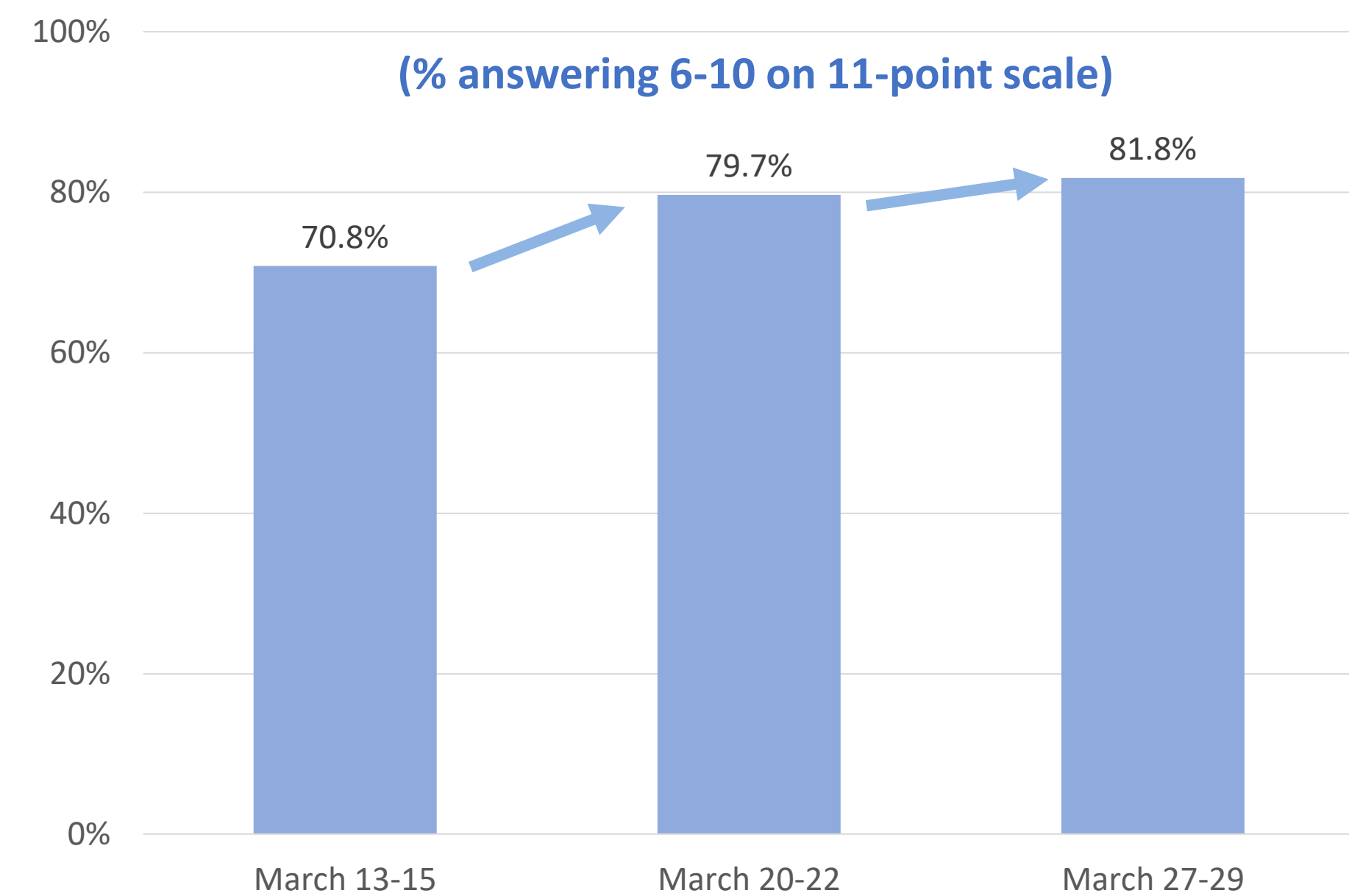
Summary charts for the safety concern metrics are shown below. Both increased again this week.

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)

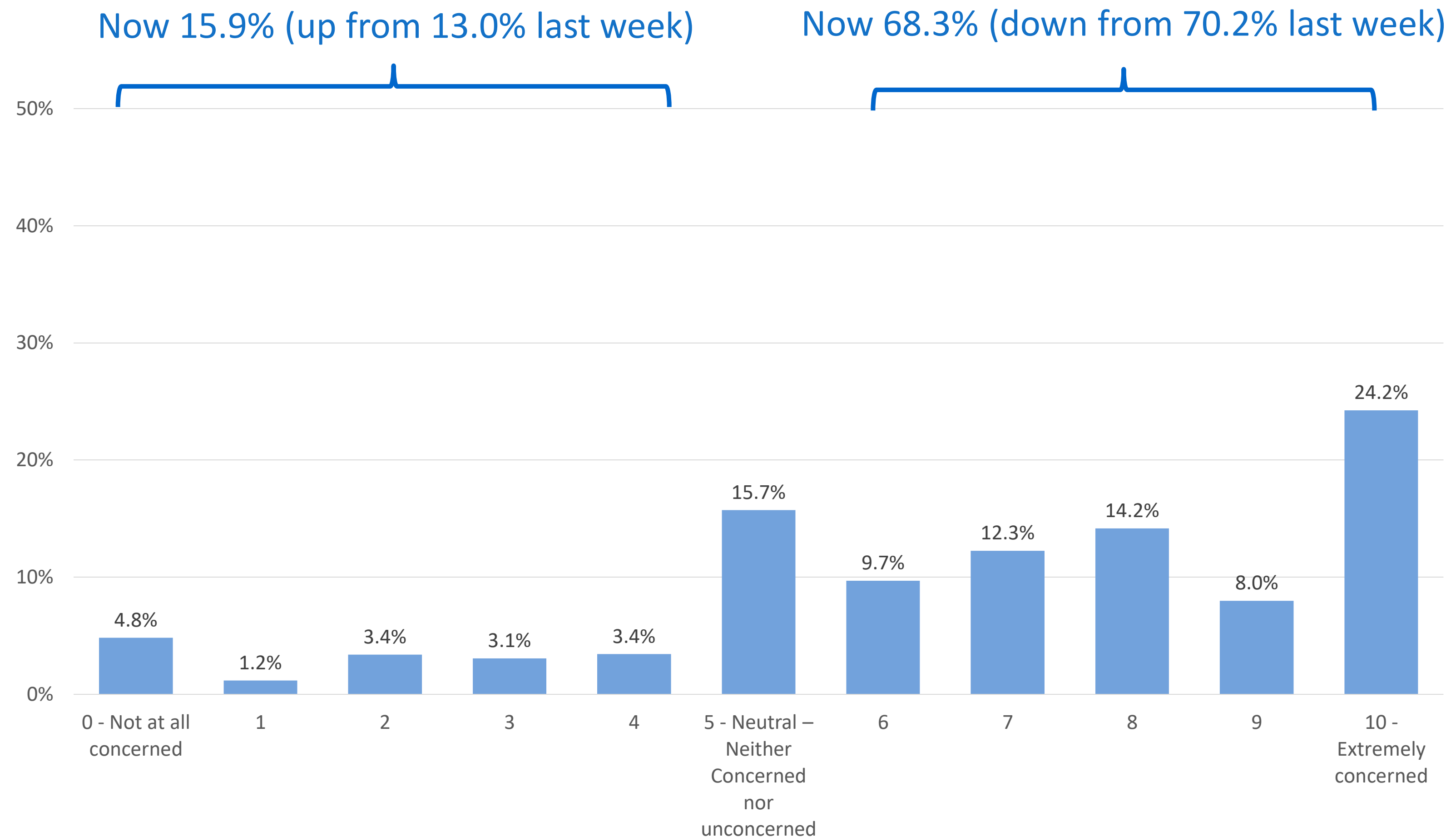
(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Concerns About Personal Finances

Now, 68.3 percent of American travelers are concerned that the pandemic will impact their personal finances. This is down slightly from 70.2 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 3 data. All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)

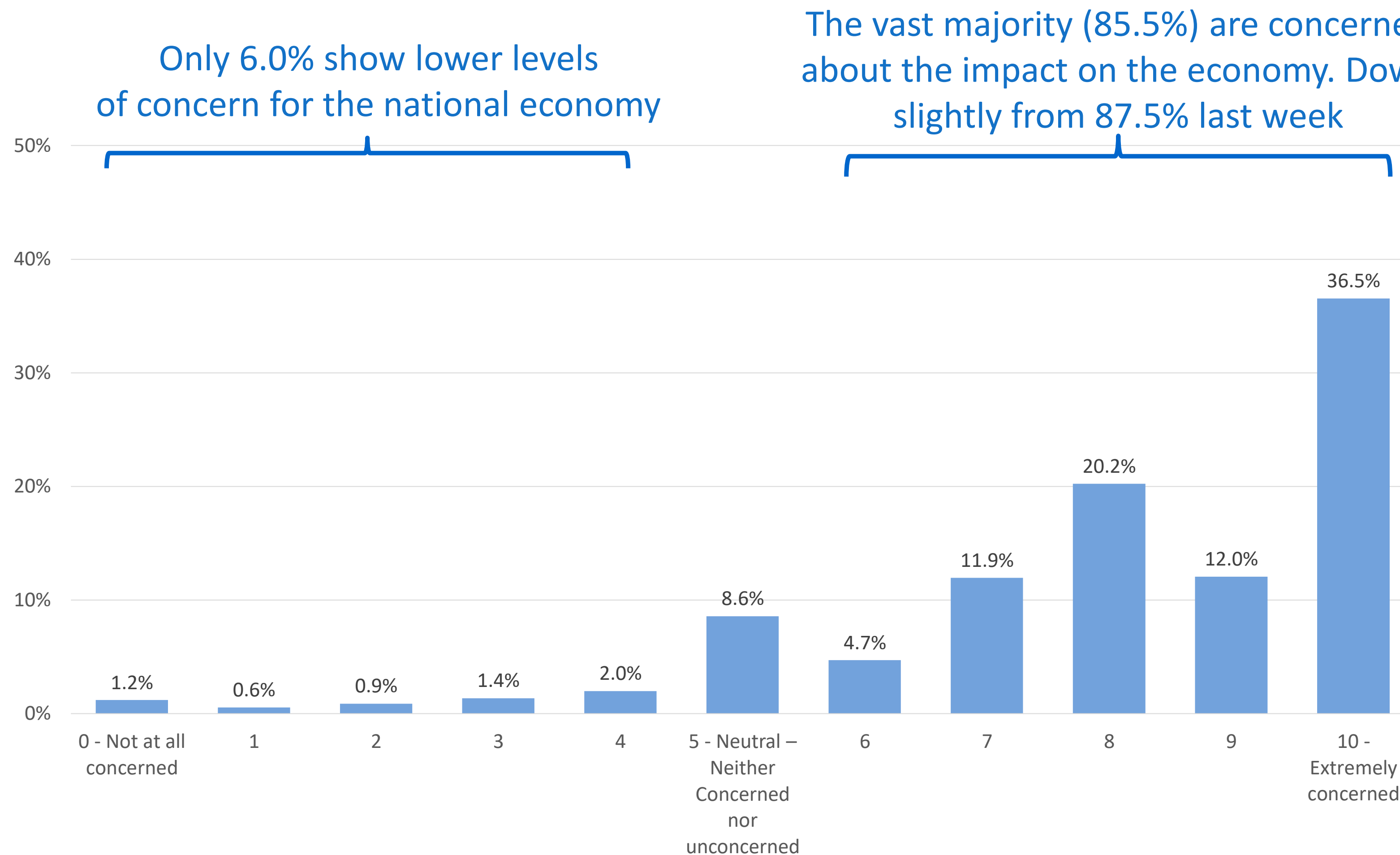


Wave 3 (March 27-29)

Concerns About National Economy

National economic concerns continue to be high. Nearly 86 percent of 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?



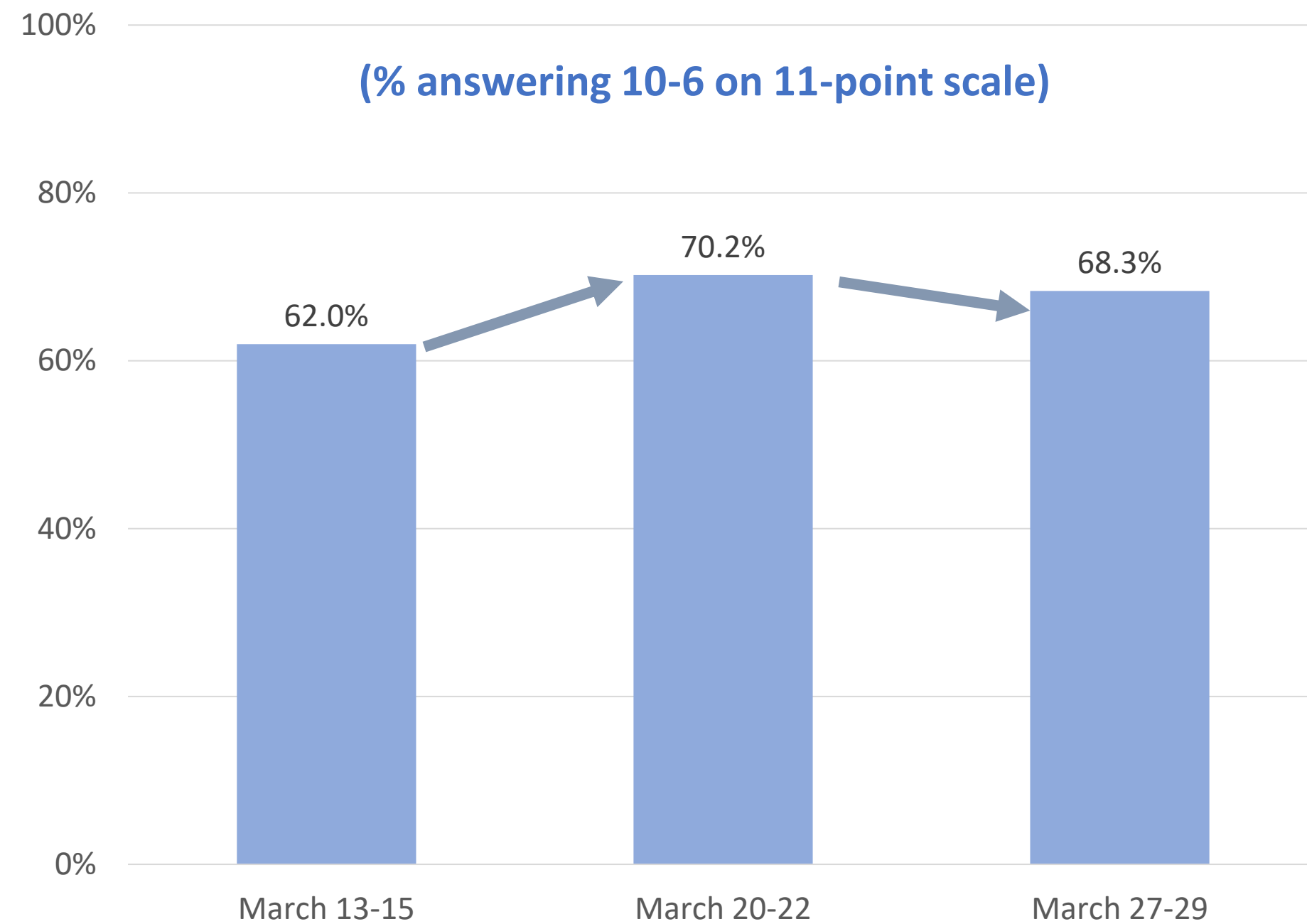
(Base: Wave 3 data. All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)

Wave 3 (March 27-29)

Summary: Economic Concern Metrics

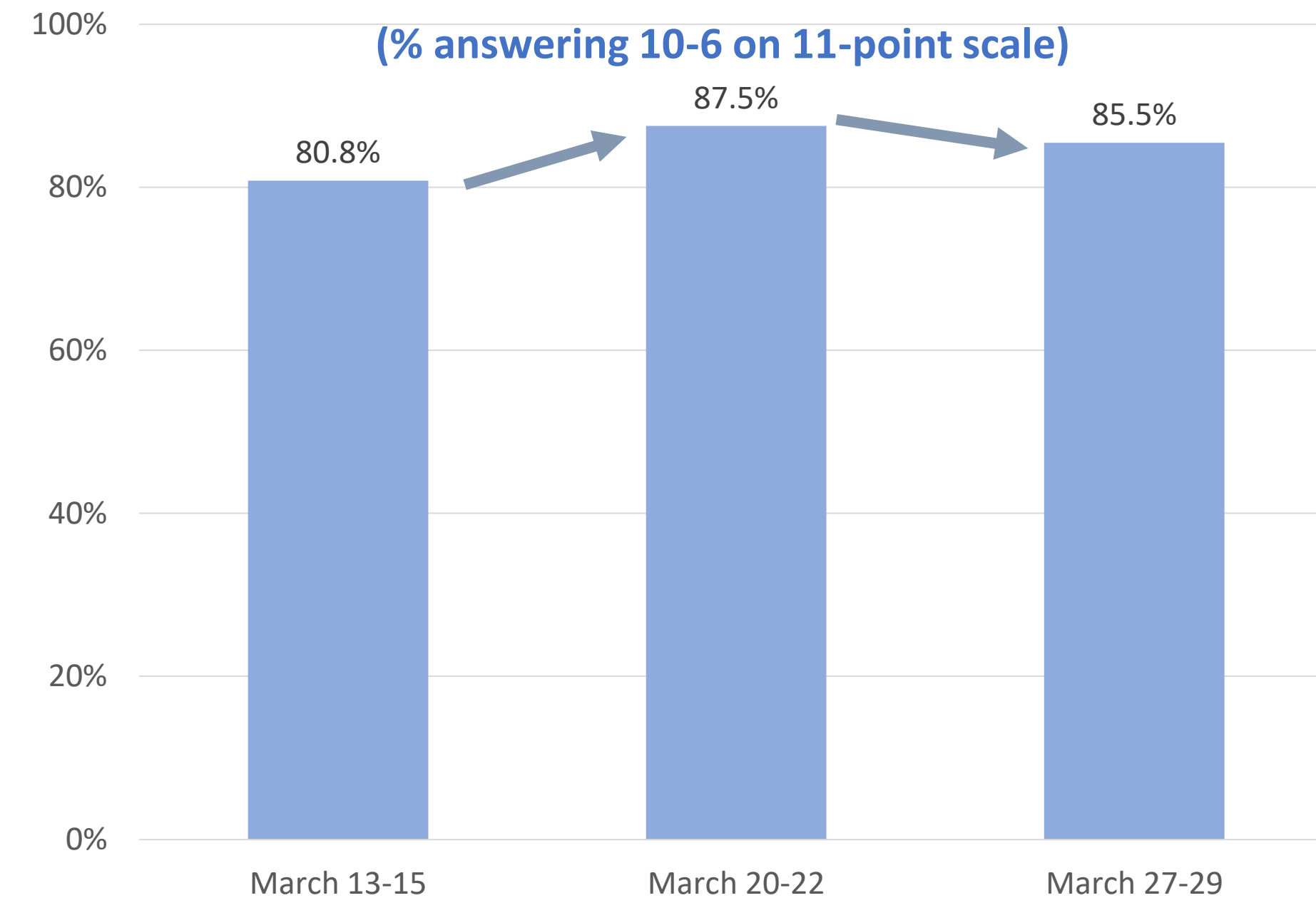
Summary charts for the two economic concern metrics are shown below. Both decreased slightly this week.

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?**

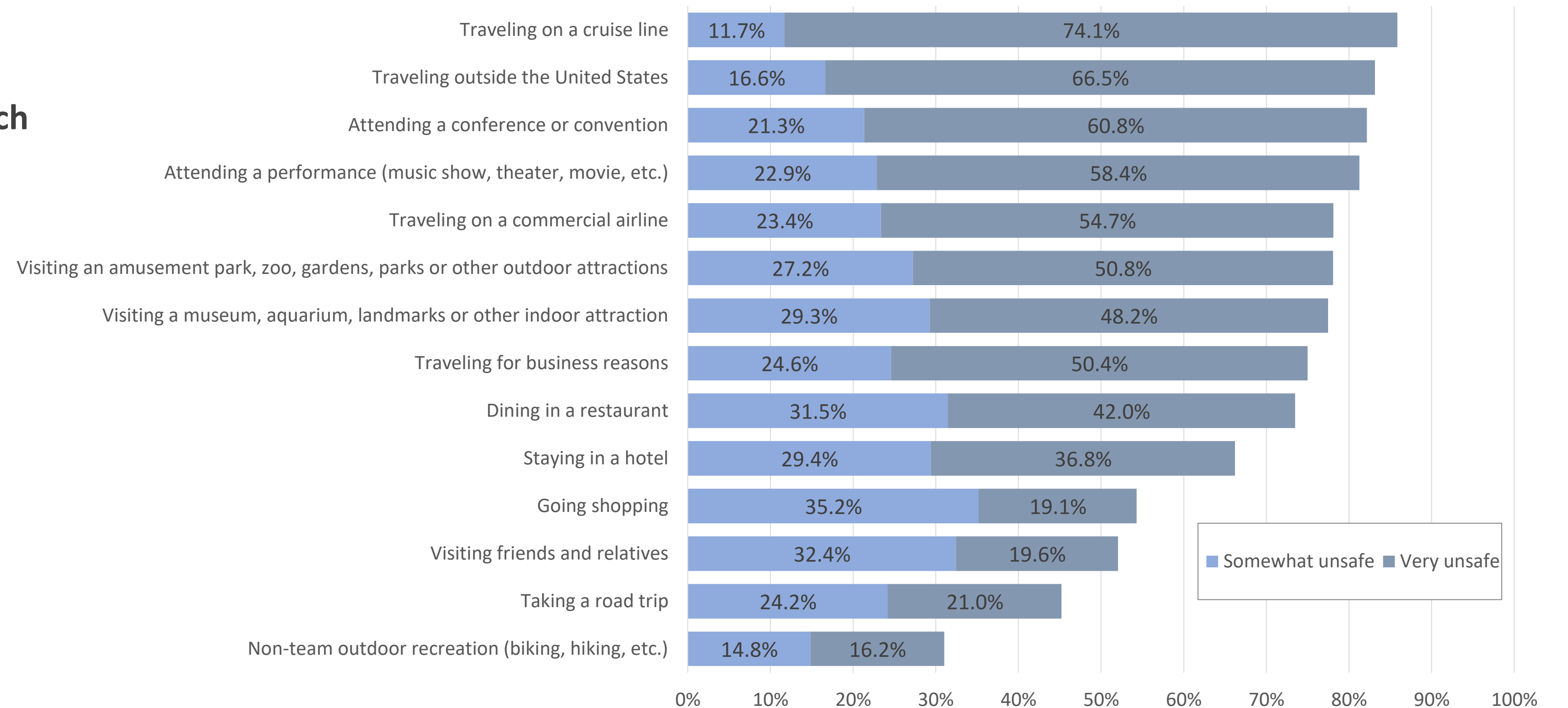
Perceived Safety of Travel Activities (Wave 3)

Cruise and foreign travel continue to be seen as the least safe travel activities. Attending a convention or conference is considered to be “Somewhat unsafe” by 21.3 percent and “Very unsafe” by 60.8 percent of travelers.

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

(Base: All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)

Wave 3 (Collected March 27-29)

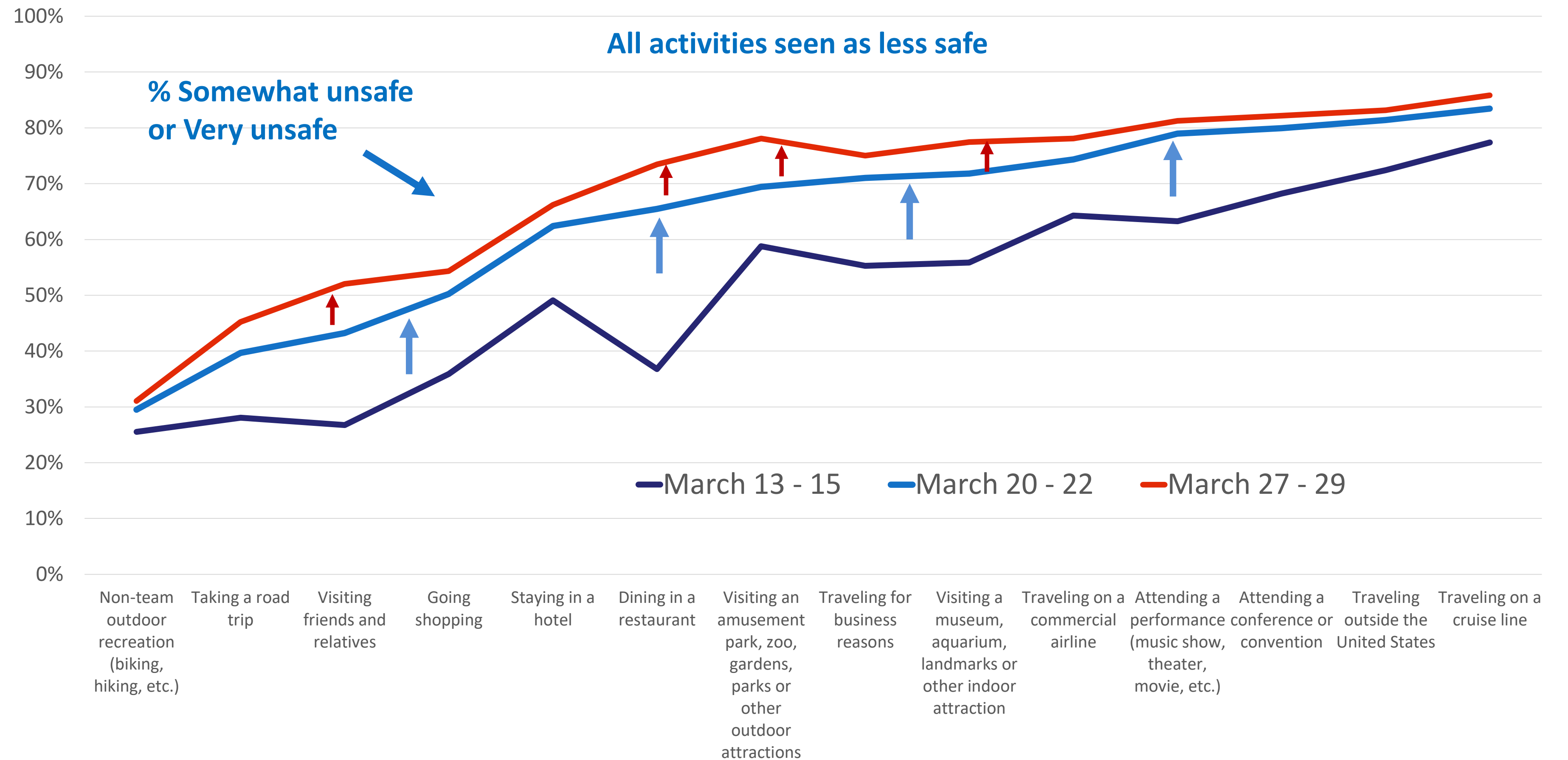


Perceived Safety of Travel Activities (Wave 1 vs. Wave 2)

All travel activities tested are seen as somewhat less safe than they were one week ago.

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

(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



Excited to Get Back to Traveling

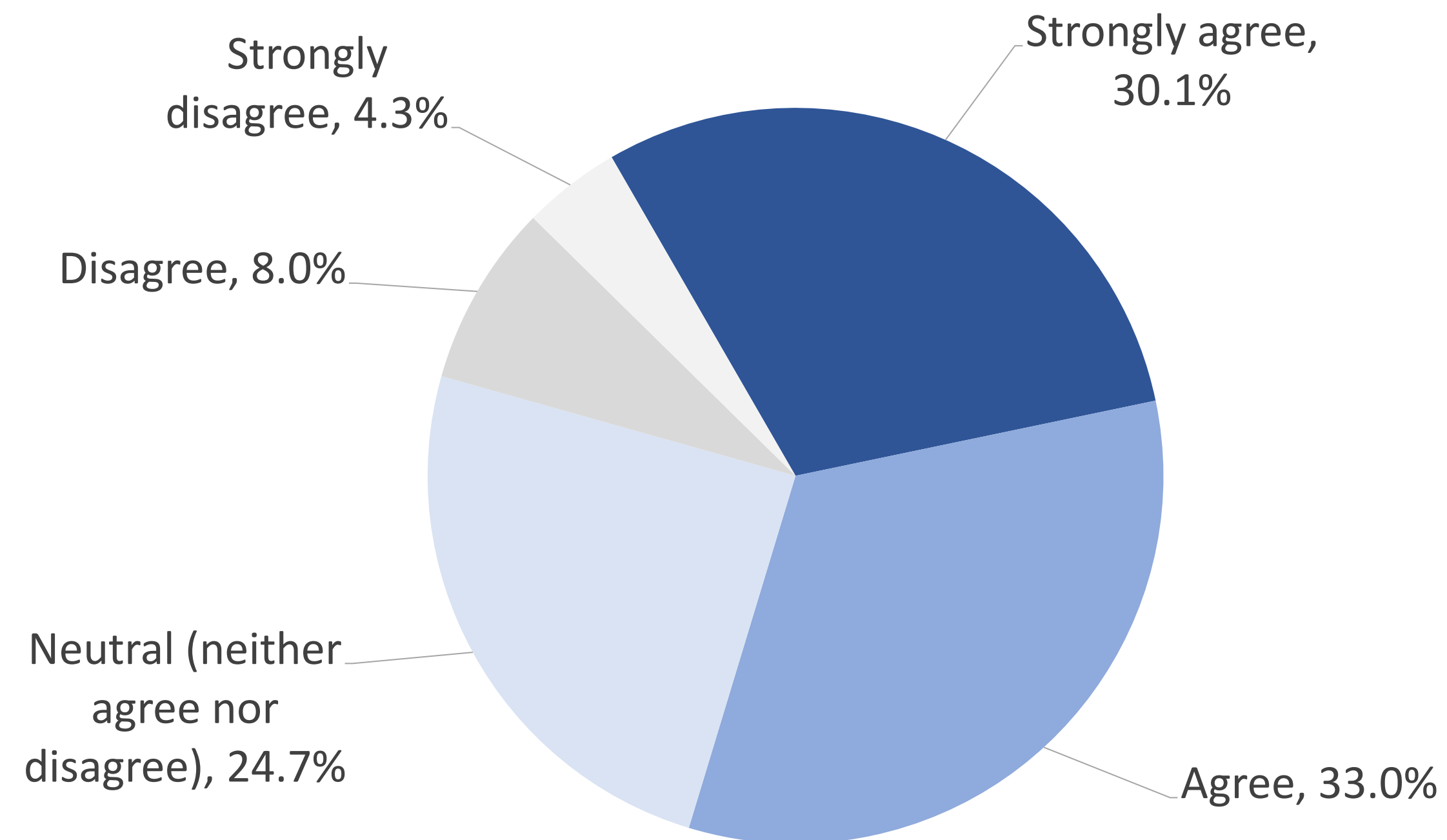
In a positive sign for a quick turn-around after the outbreak subsides, nearly 2-in-3 American travelers (63.1%) agree that they miss traveling and can't wait to get out and travel again.

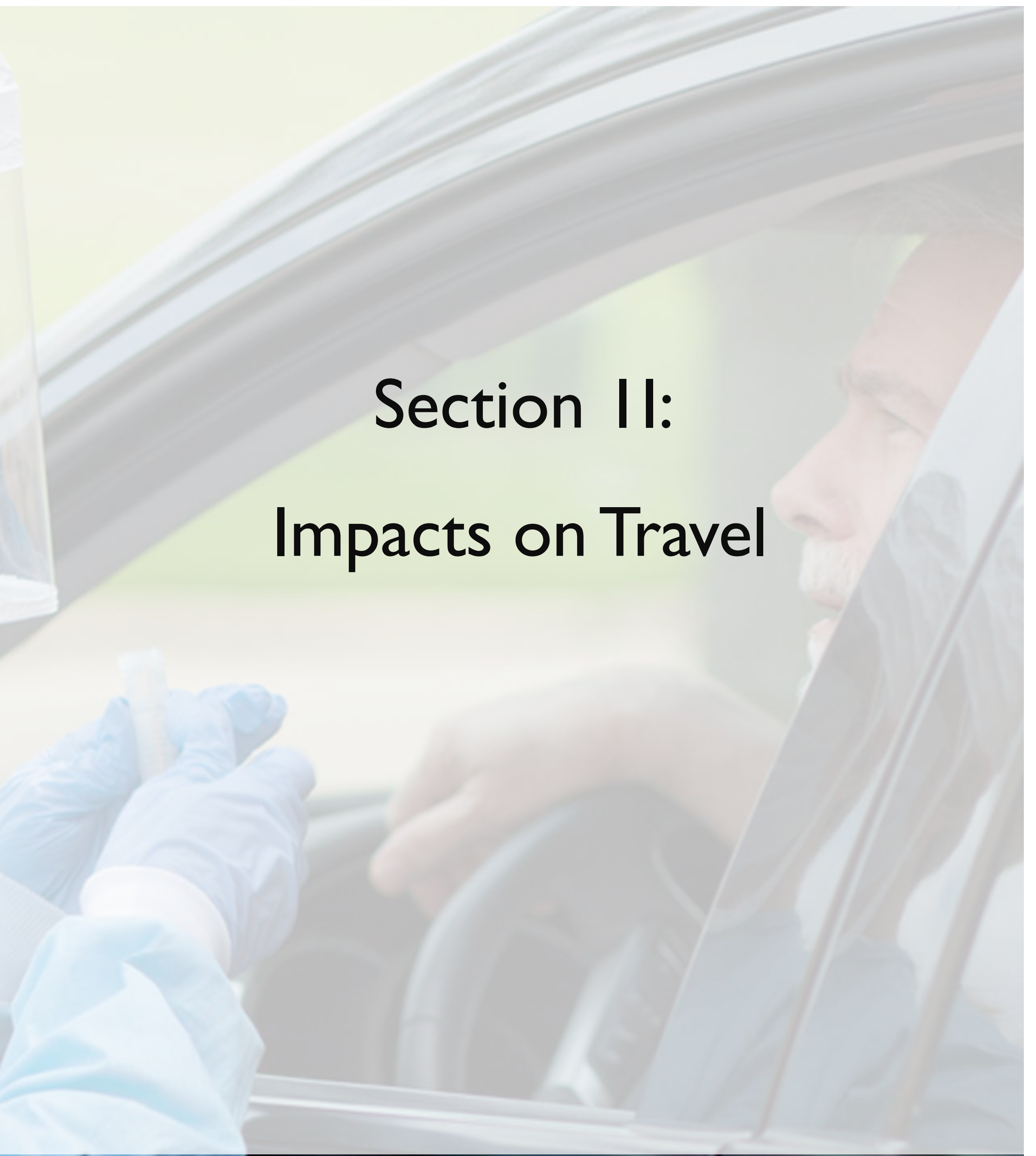
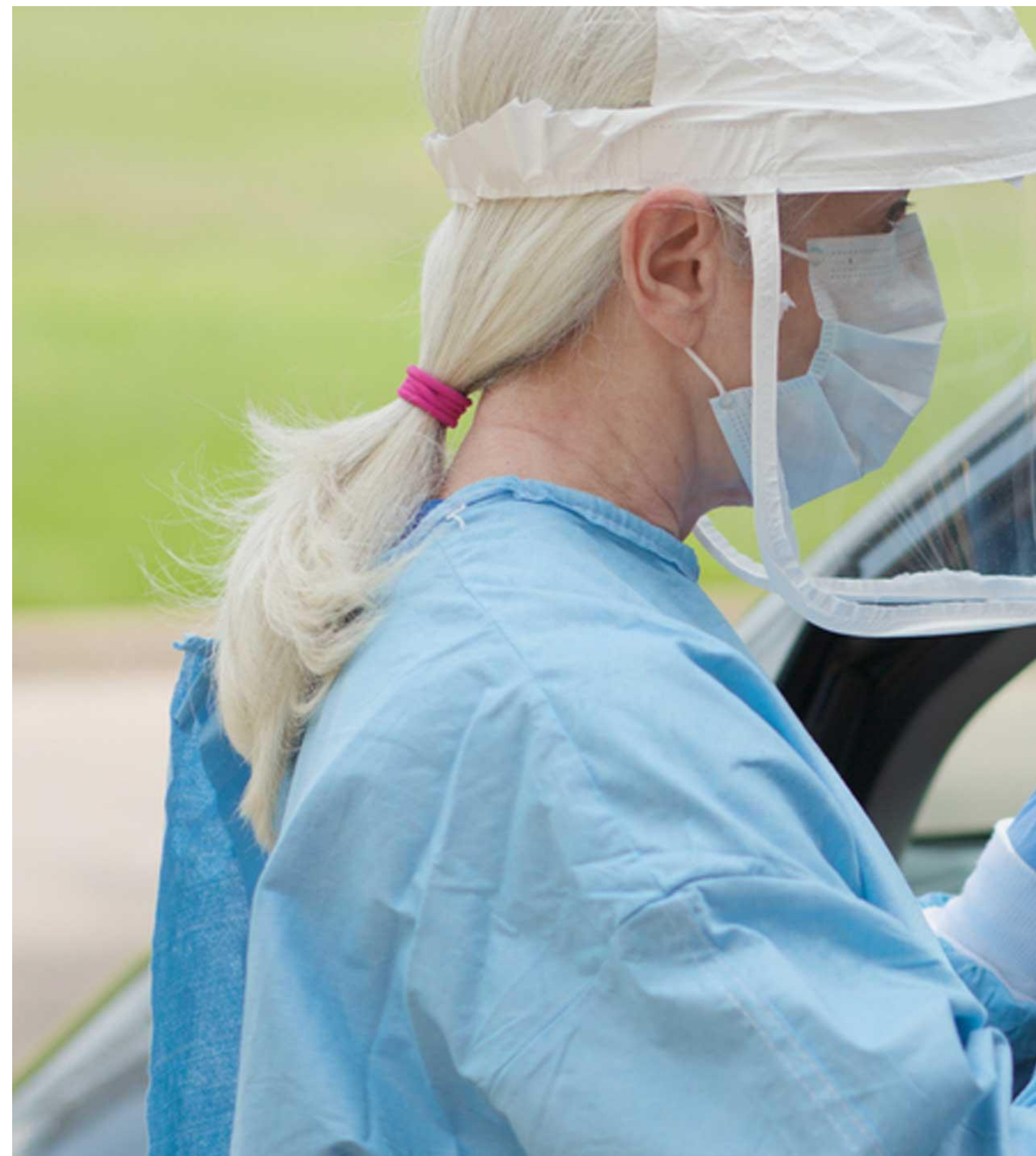
New Question Added in Wave 3

How much do you agree with the following statement?

Question: I miss traveling. I can't wait to get out and travel again.

(Base: All respondents, 1,201 completed surveys. Data collected March 27-29, 2020)



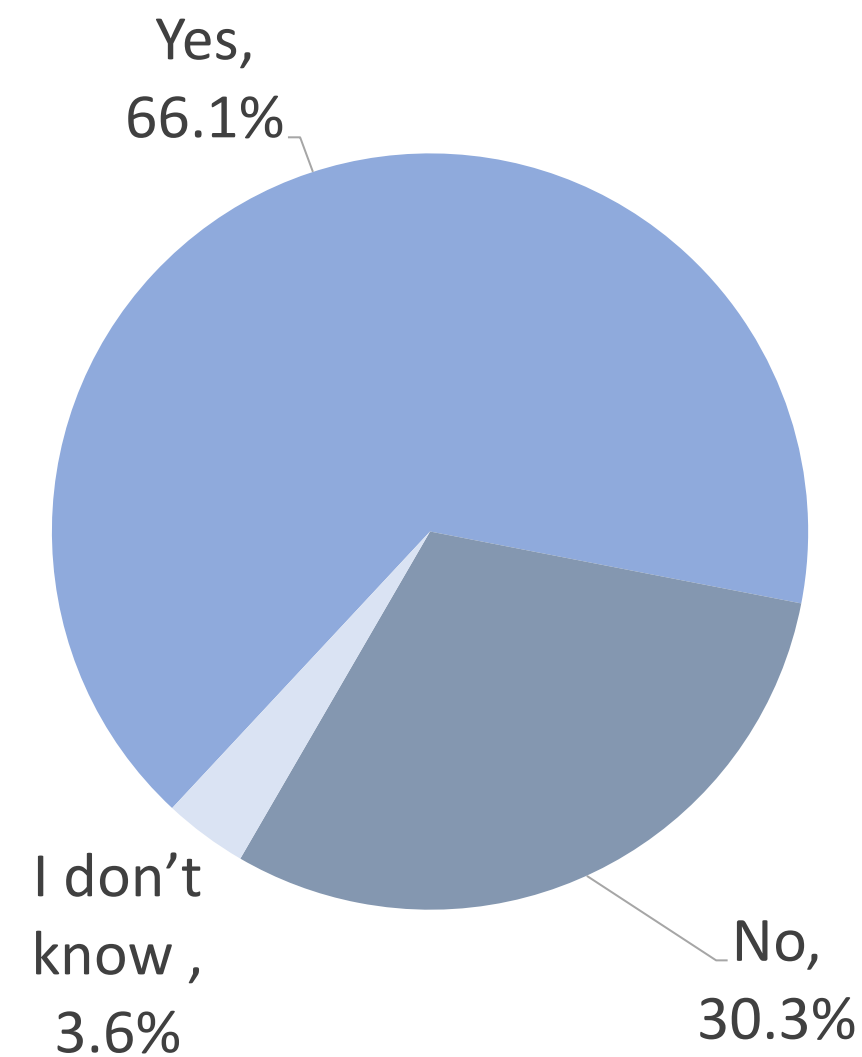


**Section II:
Impacts on Travel**

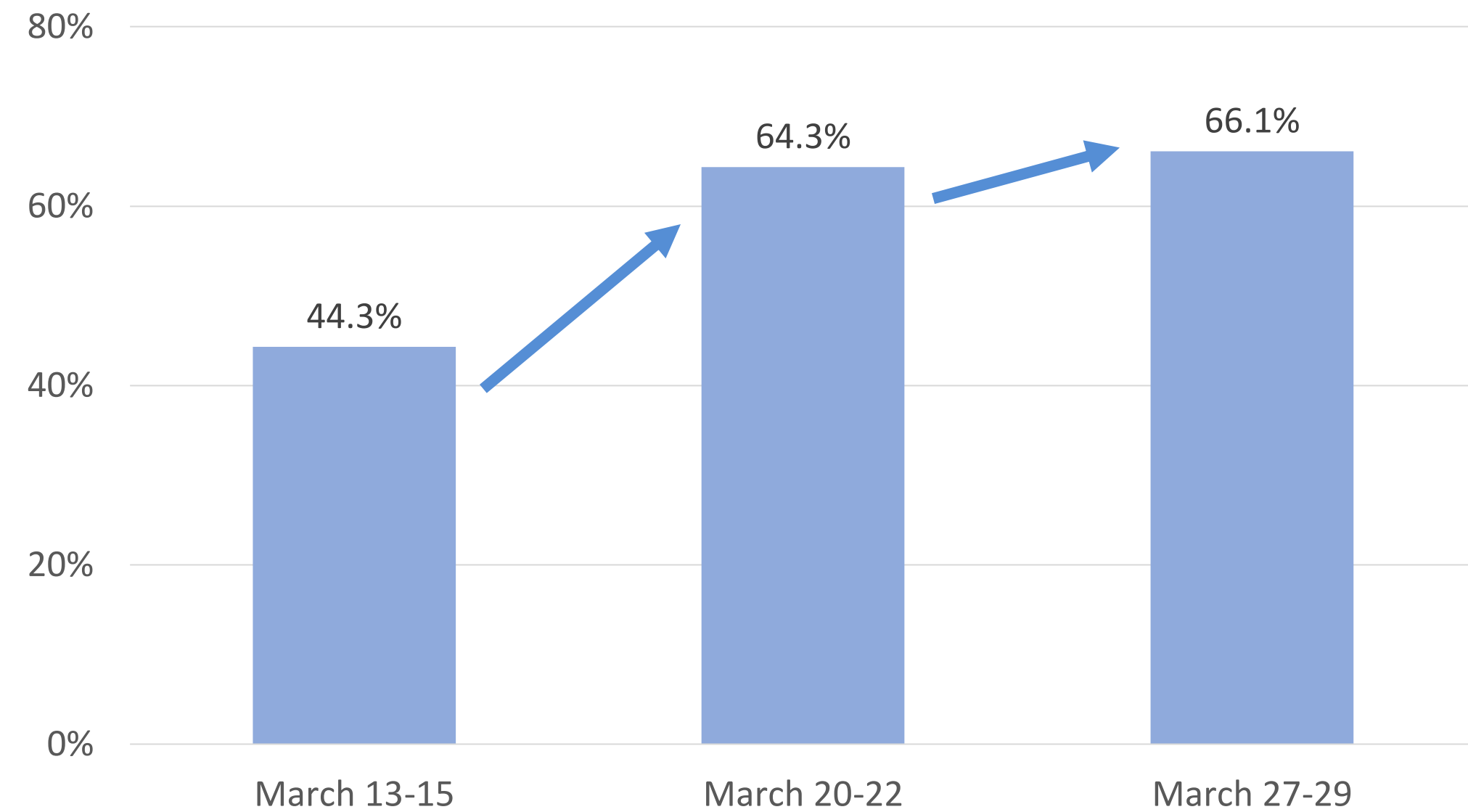
Impact of the Coronavirus on Travel

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

Wave 3 (March 27-29)



In the current survey wave, the proportion of American travelers who reported having their travels impacted by the coronavirus grew slightly to 66.1 percent.



(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

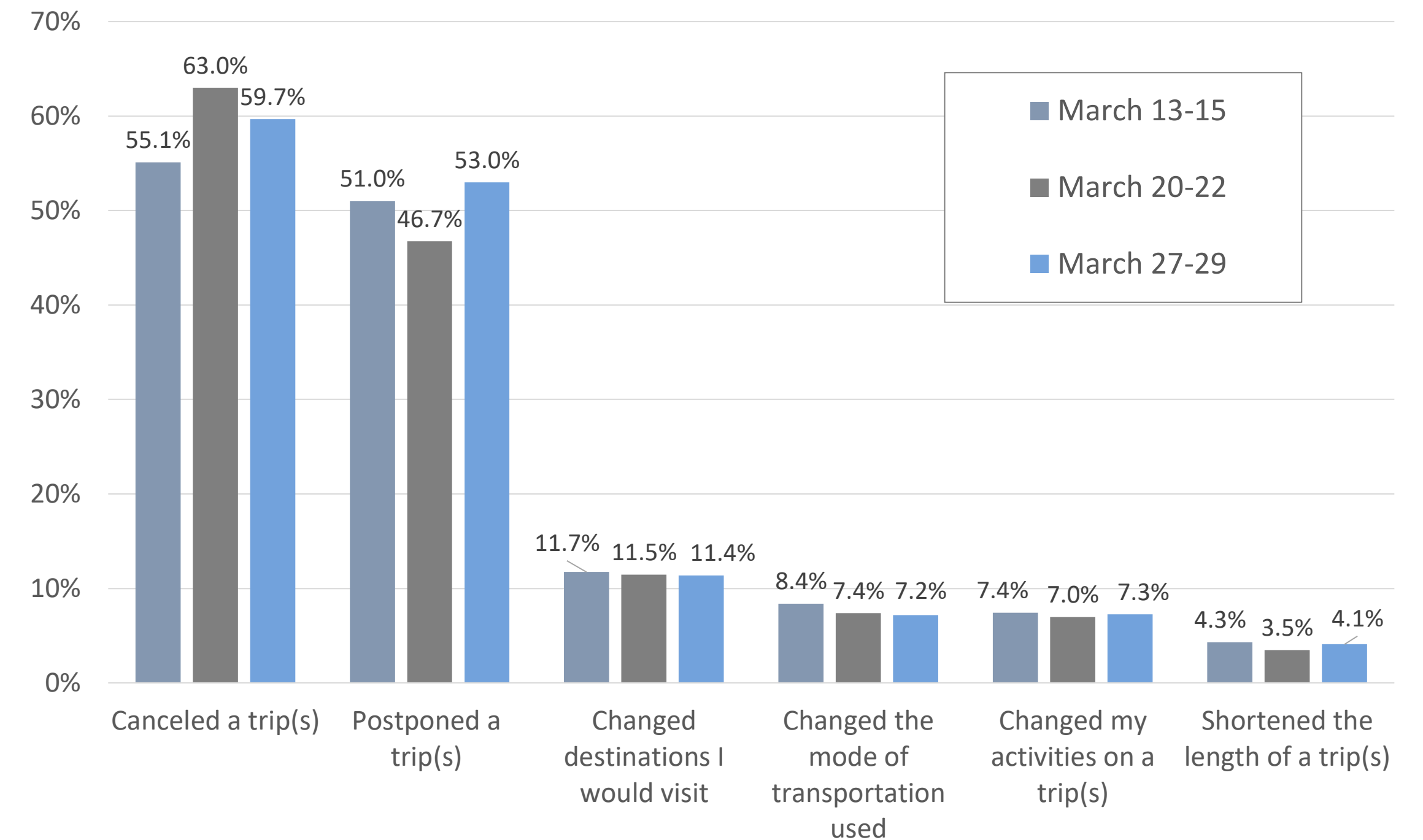
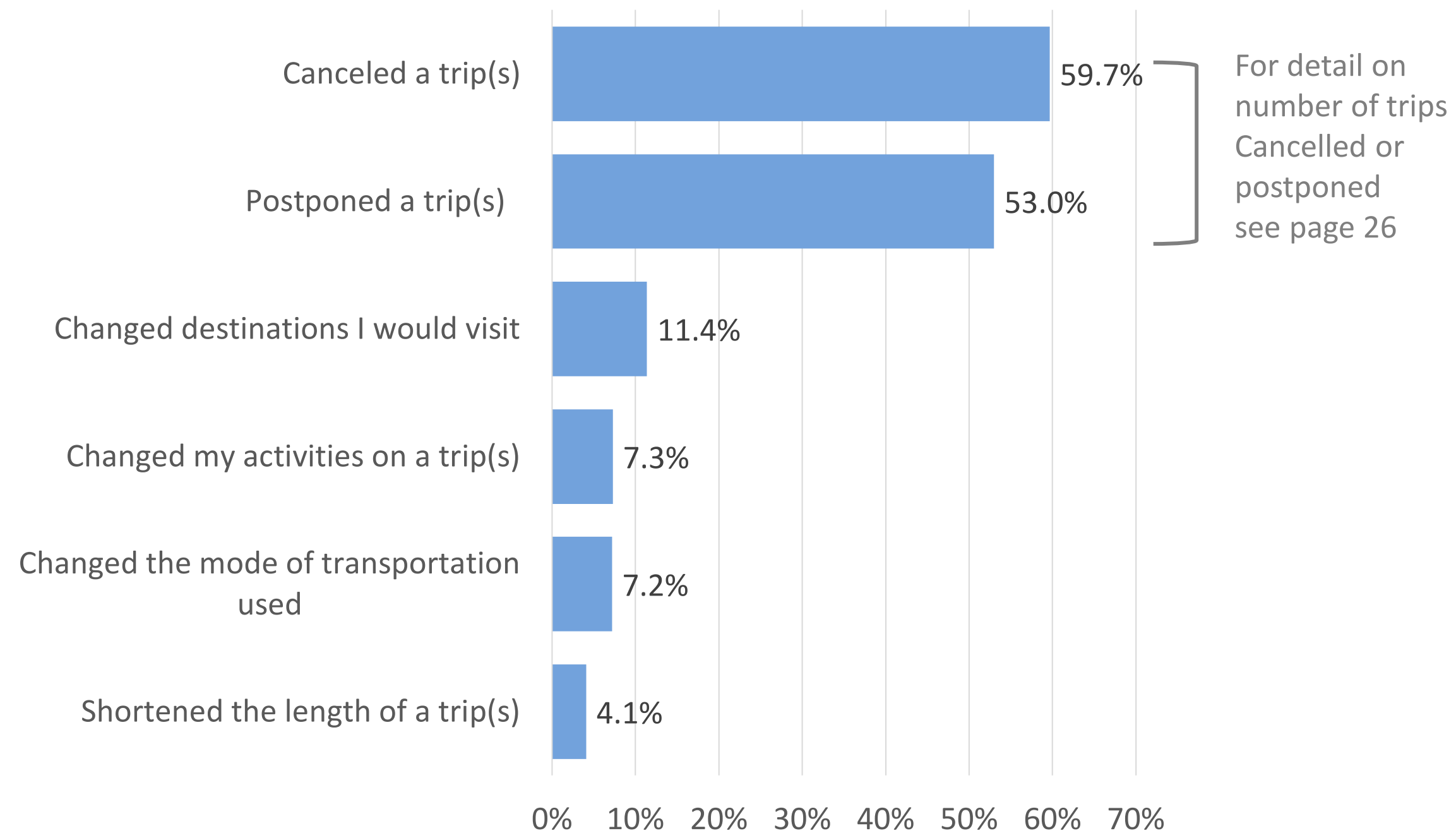
How the Coronavirus has Impacted Travel

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

Due to the Coronavirus situation, I have_____.

This week, 59.7 percent of travelers said they had cancelled a trip, compared to 63.0 percent last week. Postponements were up to 53.0% this week, from 46.7 percent last week.

Wave 3 (March 27-29)



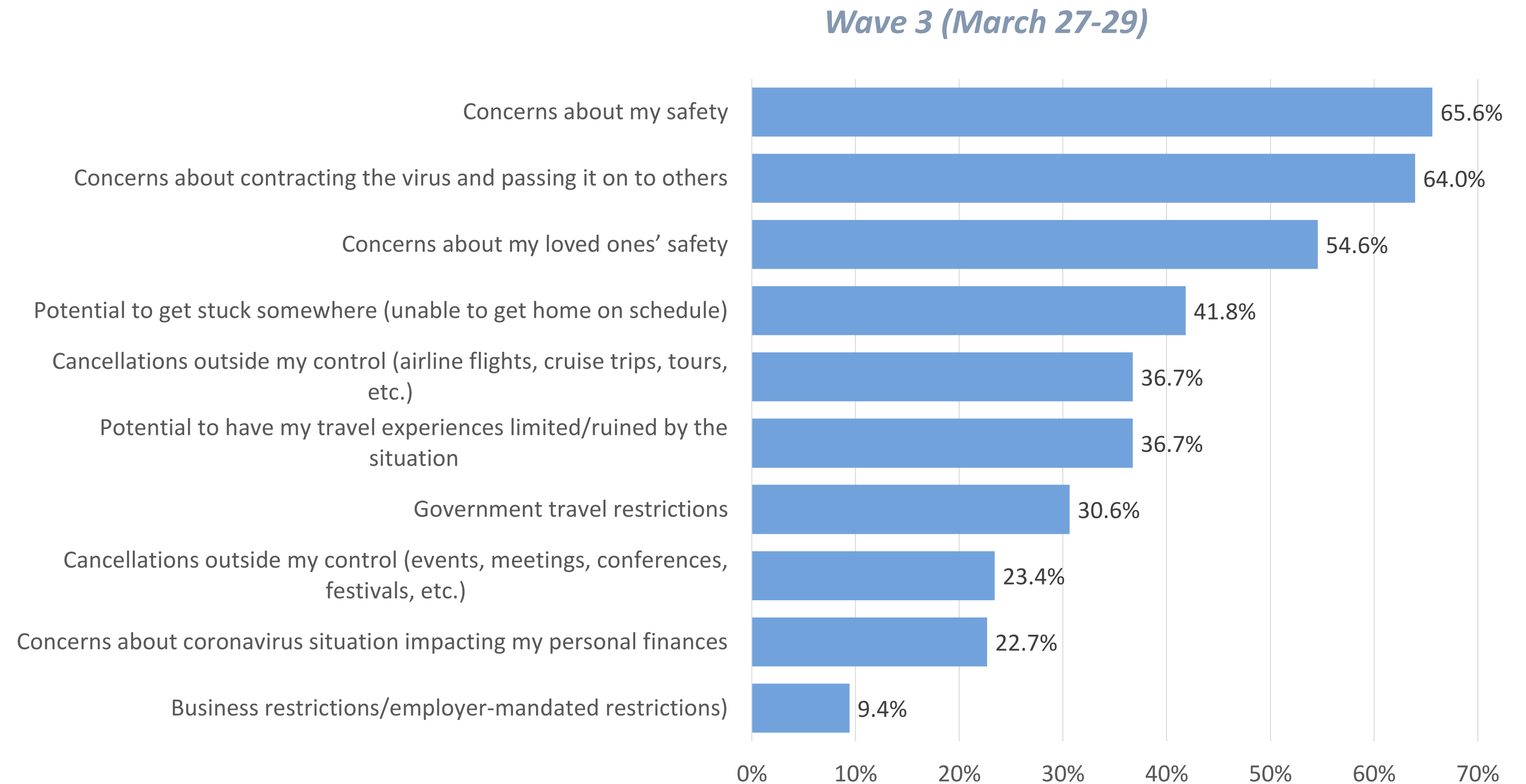
(Base: Respondents whose travel was impacted by the Coronavirus, 533, 770 and 795 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Why the Coronavirus is Impacting Travel

This week, concerns about personal safety again topped the reasons expressed for why Americans have changed their travels, with 2-of-3 respondents (65.6%) citing it as a reason.

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

(Base: Respondents whose travel was impacted by the Coronavirus, 533, 770 and 795 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



Why the Coronavirus is Impacting Travel (Detailed Changes)

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

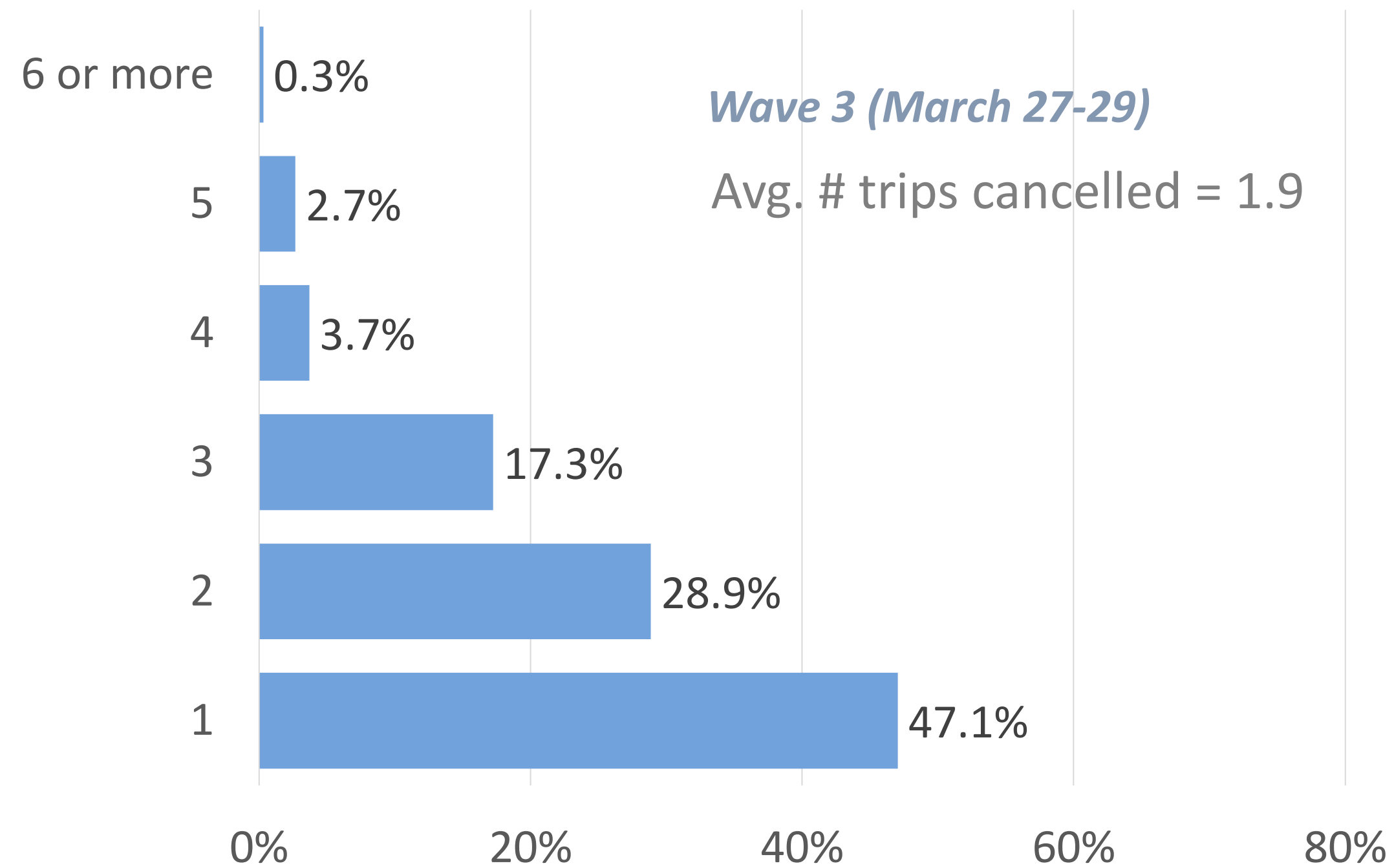
(Base: Respondents whose travel was impacted by the Coronavirus, 533, 770 and 795 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

	March 13 - 15	March 20 - 22	March 27 - 29	% CHNG (over previous week)
Concerns about my safety	60.1%	62.8%	65.6%	4.4%
Concerns about contracting the virus and passing it on to others	60.8%	56.4%	64.0%	13.3%
Concerns about my loved ones' safety	49.4%	52.4%	54.6%	4.2%
Potential to get stuck somewhere (unable to get home on schedule)	40.1%	42.4%	41.8%	-1.4%
Cancellations outside my control (airline flights, cruise trips, tours, etc.)	28.0%	32.9%	36.7%	11.7%
Potential to have my travel experiences limited/ruined by the situation	30.2%	37.0%	36.7%	-0.7%
Government travel restrictions	16.9%	30.6%	30.6%	0.2%
Cancellations outside my control (events, meetings, conferences, festivals, etc.)	23.1%	27.4%	23.4%	-14.5%
Concerns about coronavirus situation impacting my personal finances	15.0%	23.0%	22.7%	-1.3%
Business restrictions/employer-mandated restrictions)	6.8%	8.8%	9.4%	7.5%
Base (completes)	552	768	792	

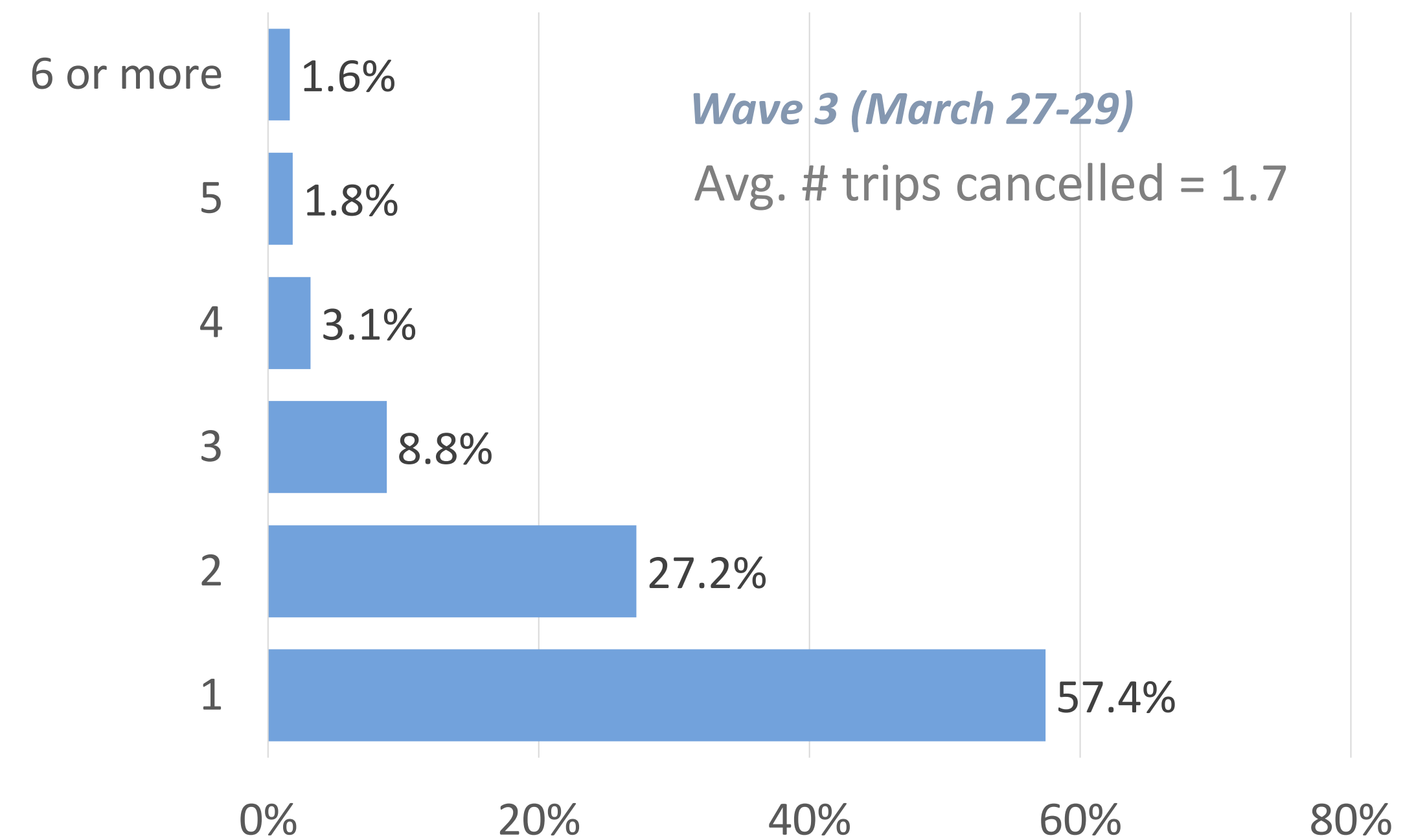
Trips Cancelled/Postponed

The average American traveler says they have cancelled 1.9 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.7 trips due to the crisis.

Question: How many trips did you cancel?



Question: How many trips did you postpone?

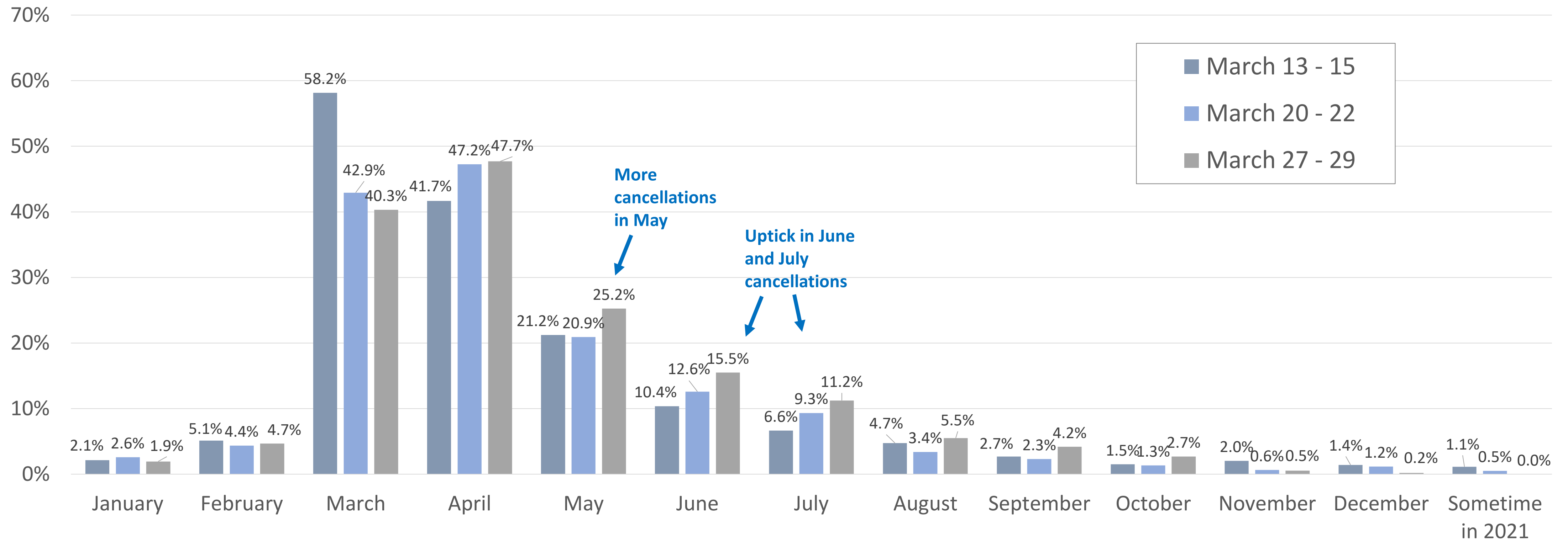


(Base: Respondents cancelling/postponing a trip, 507/408 completed surveys. Data collected March 27-29th, 2020)

Month of Trip Cancellation

The majority of travel cancellations appear to be near-term bookings, but we note continued 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)

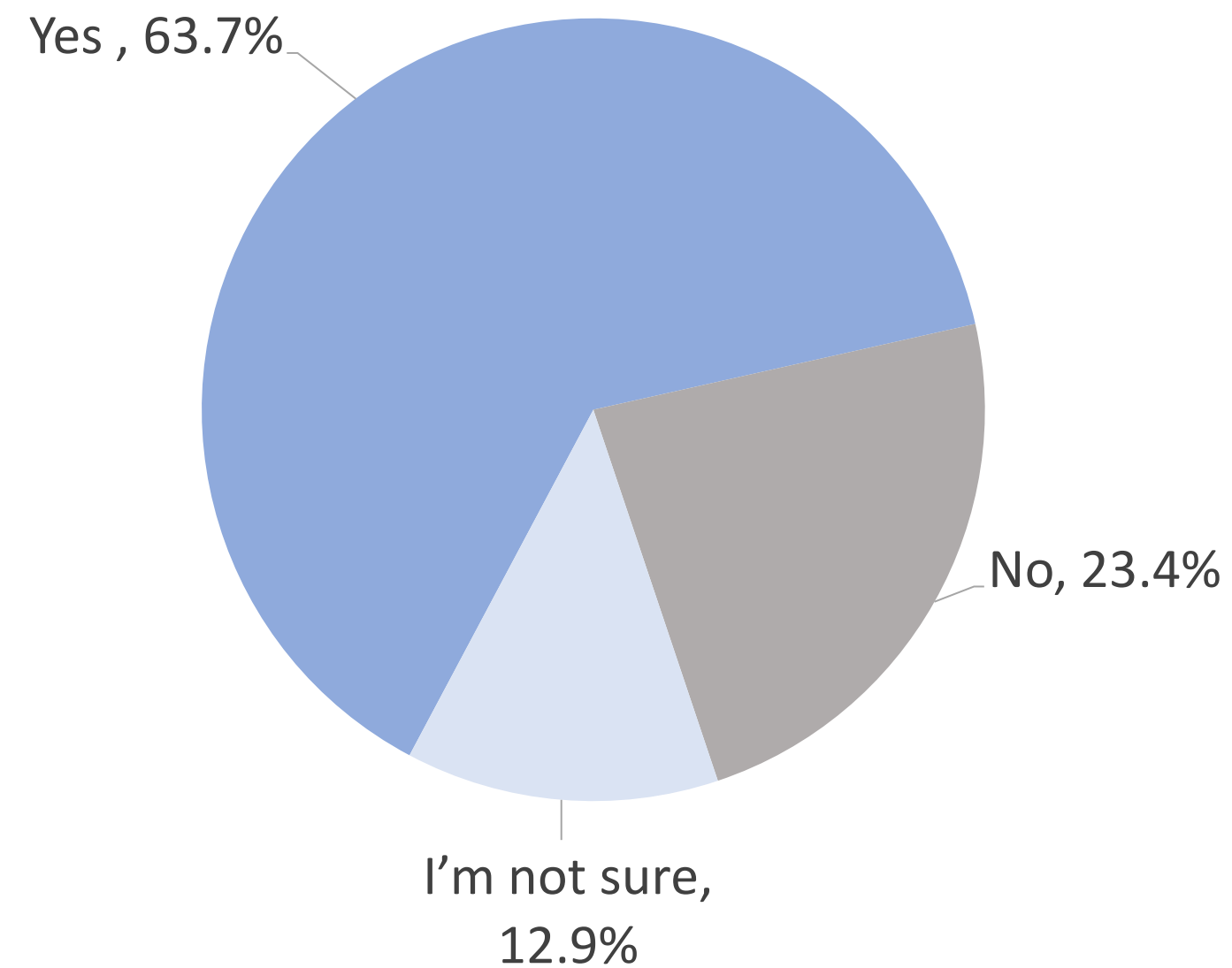


(Base: Cancelling trips , 292,477 and 506 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Did Traveler Get Full Refunds?

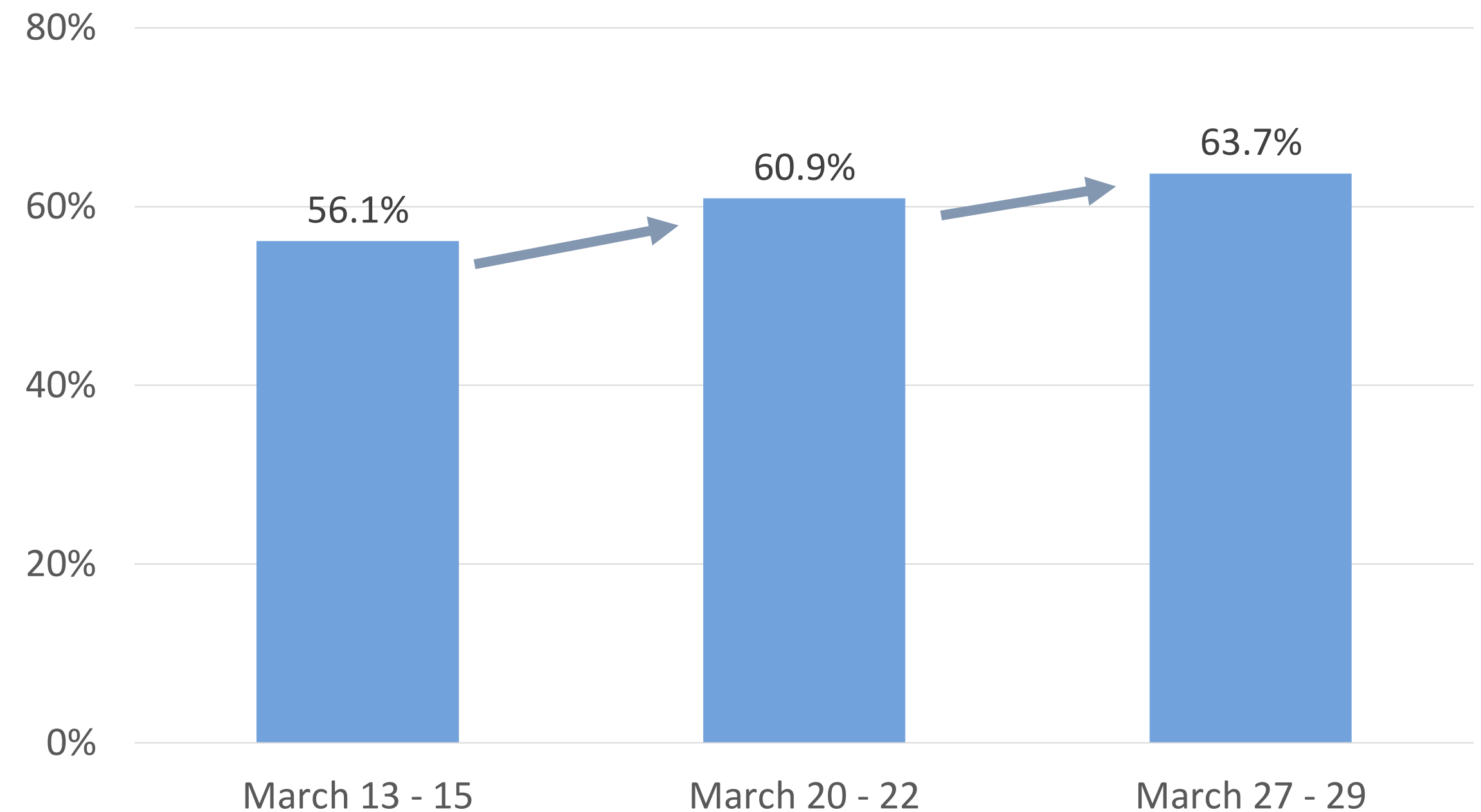
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 3 (March 27-29)



(Base: Respondents cancelling a trip, 404 completed surveys. Data collected March 27-29, 2020)

More travelers continue to be fully refunded for cancelled trips. This week, 63.7 percent report receiving full refunds, compared to 60.9 percent last week.

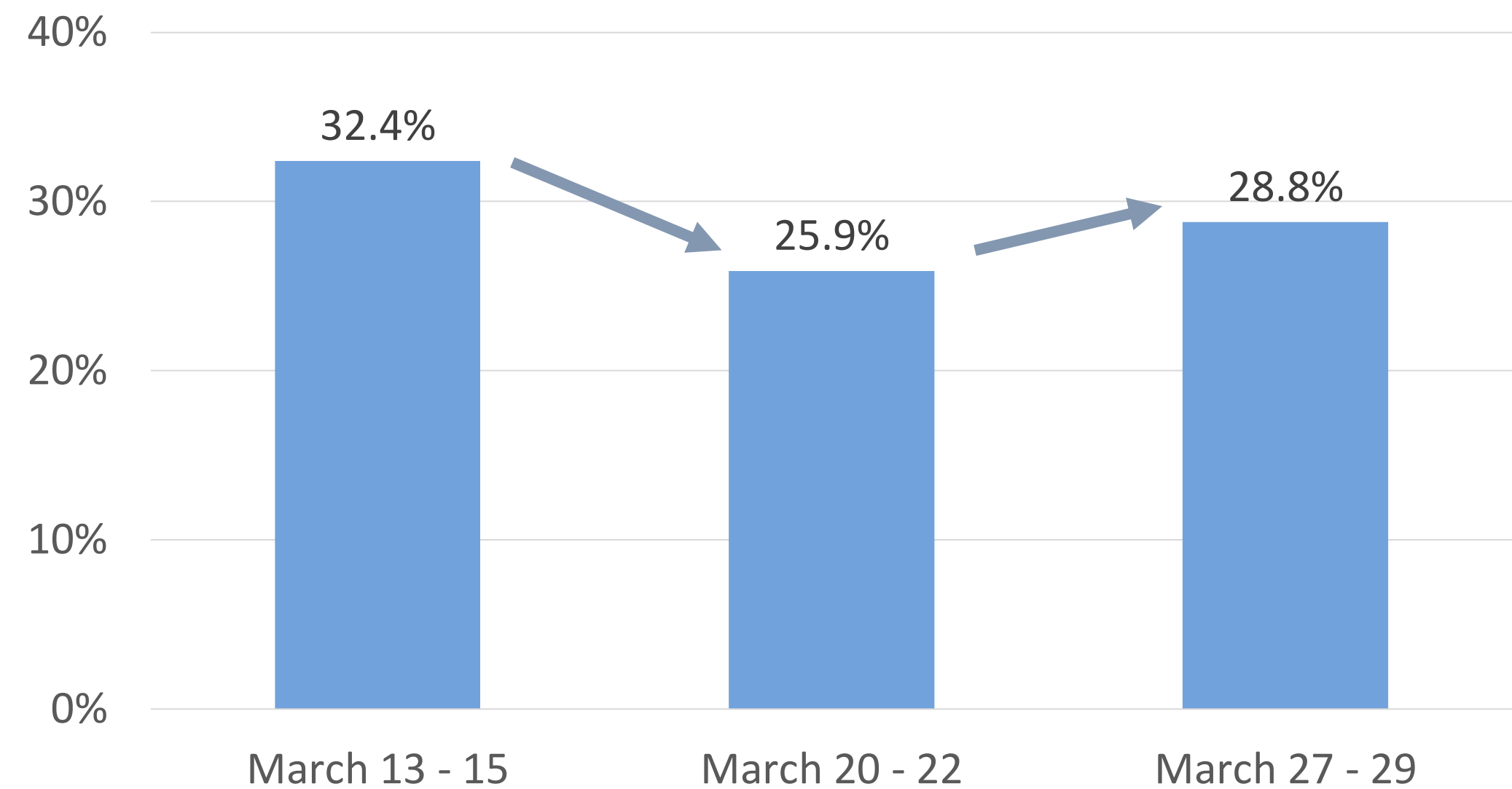
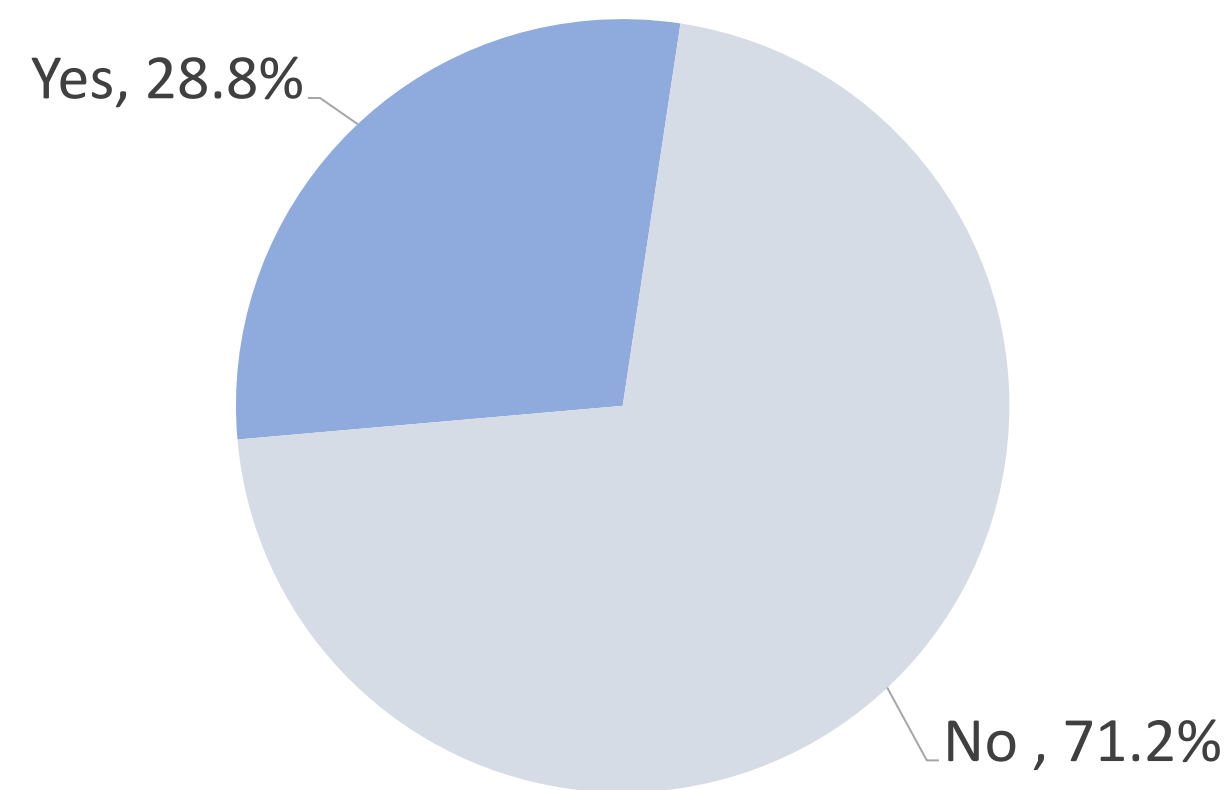


Were Postponed Trips Rescheduled?

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

About 7-of-10 of postponed trips (71.2%) are now not being rescheduled.

Wave 3 (March 27-29)

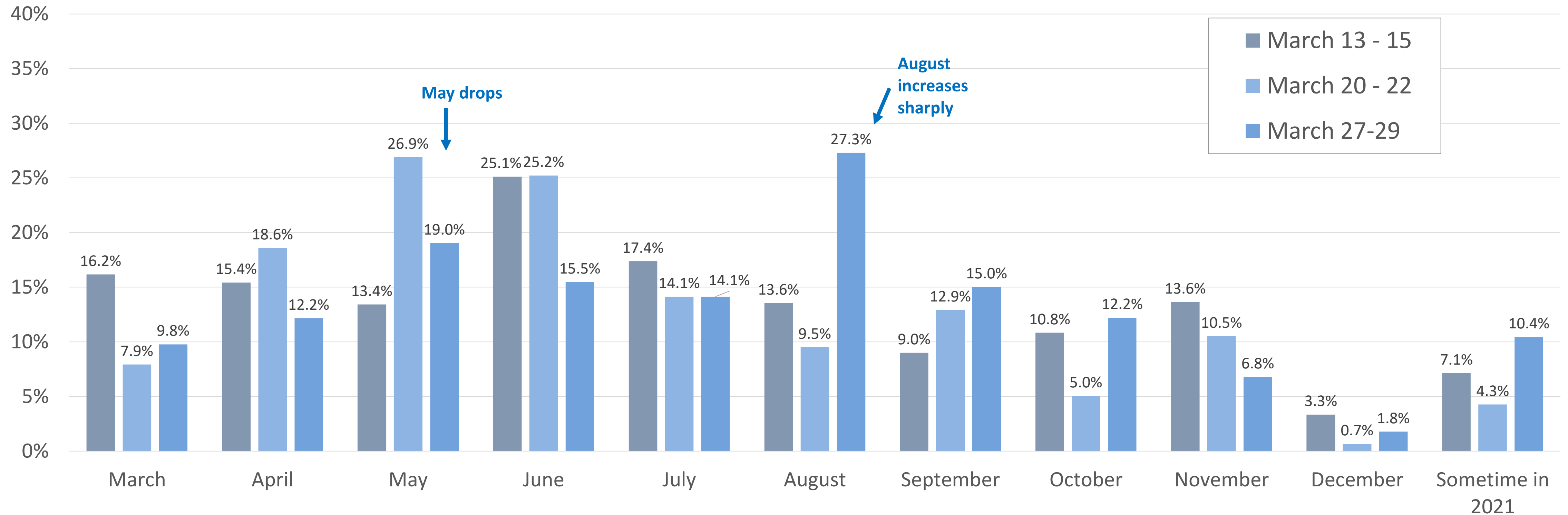


(Base: Postponing trips , 277, 354 and 404 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Month Postponed Trips Rescheduled

Postponement windows may be lengthening after an initial period of optimism. This week saw a big jump in the proportion of travelers rescheduling trips who said they would take that trip now in August.

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



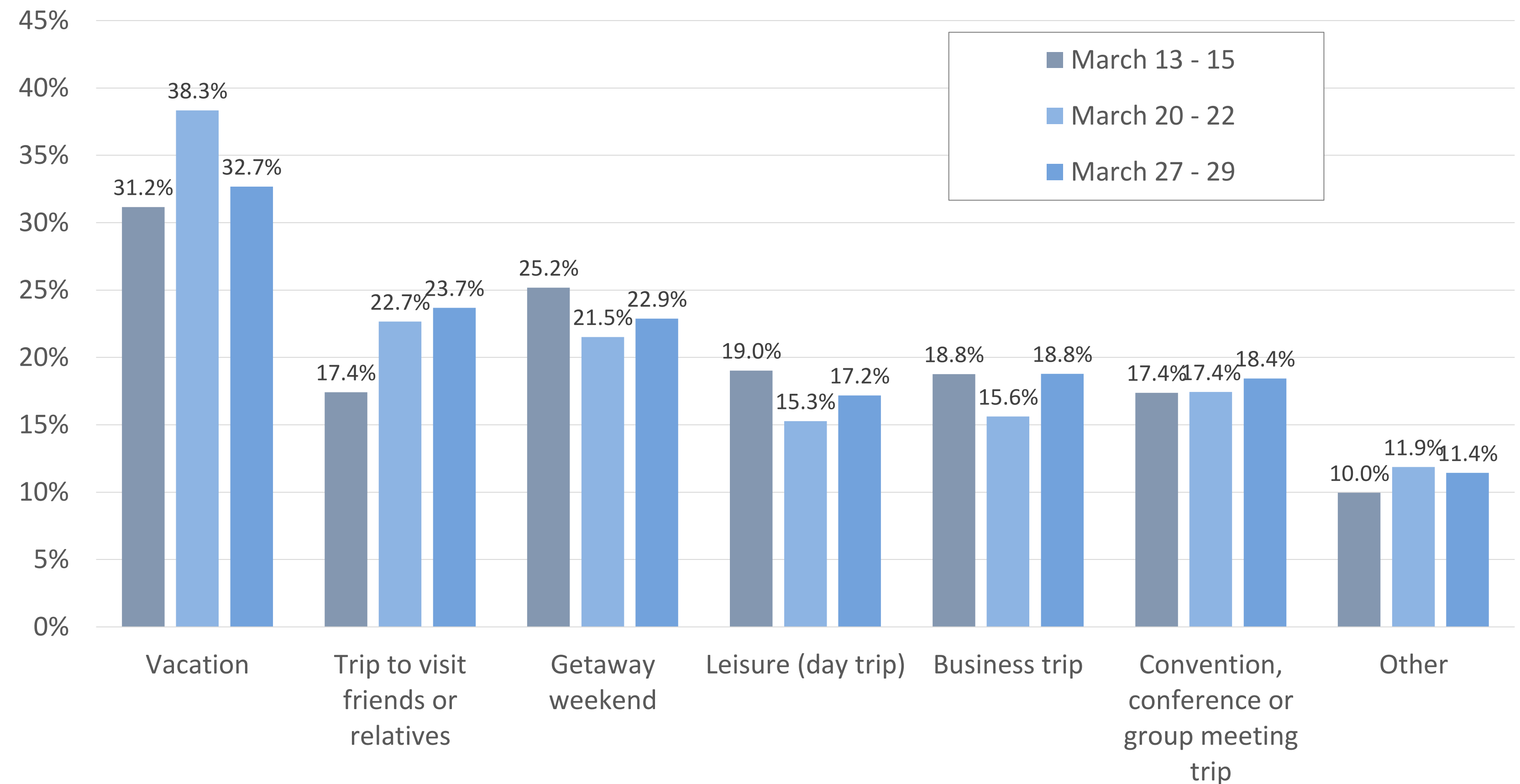
(Base: Postponing trips rescheduled , 99,86 and 120 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Types of Trips Cancelled

All types of trips are being cancelled, with the most common type of cancellation being vacations. This week, 32.7 percent of those cancelling a trip did so for a vacation.

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

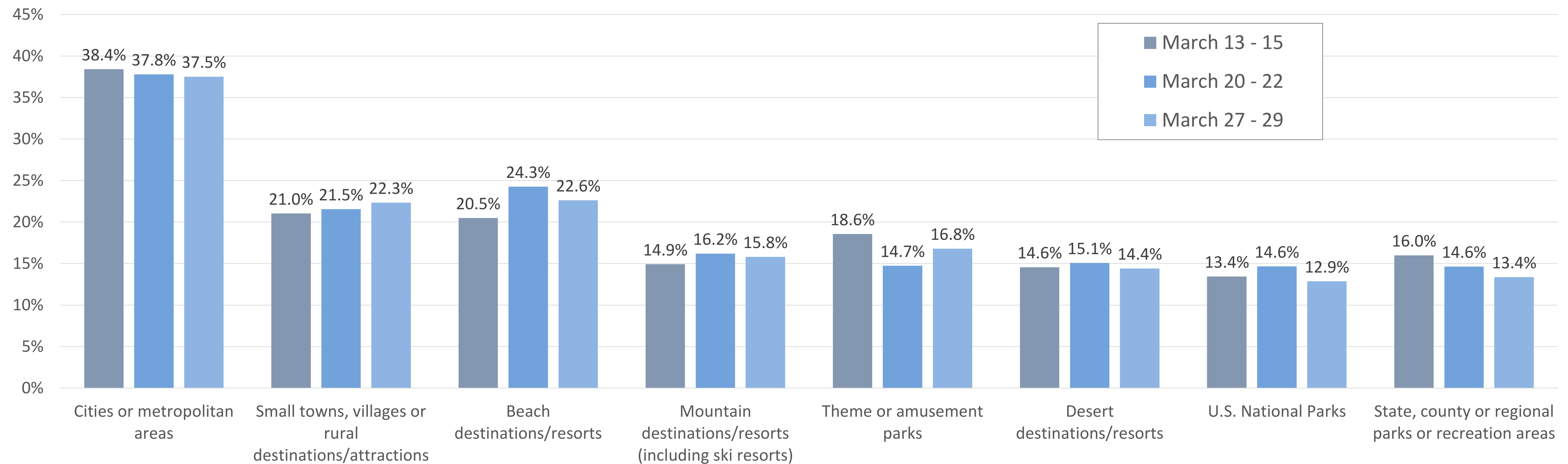
(Base: Cancelling trips, 292,477 and 506 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



Type of Destination Being Cancelled

Again, in this wave there was little change in the types of destinations being cancelled, with cities and urban areas still bearing the highest level of 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)



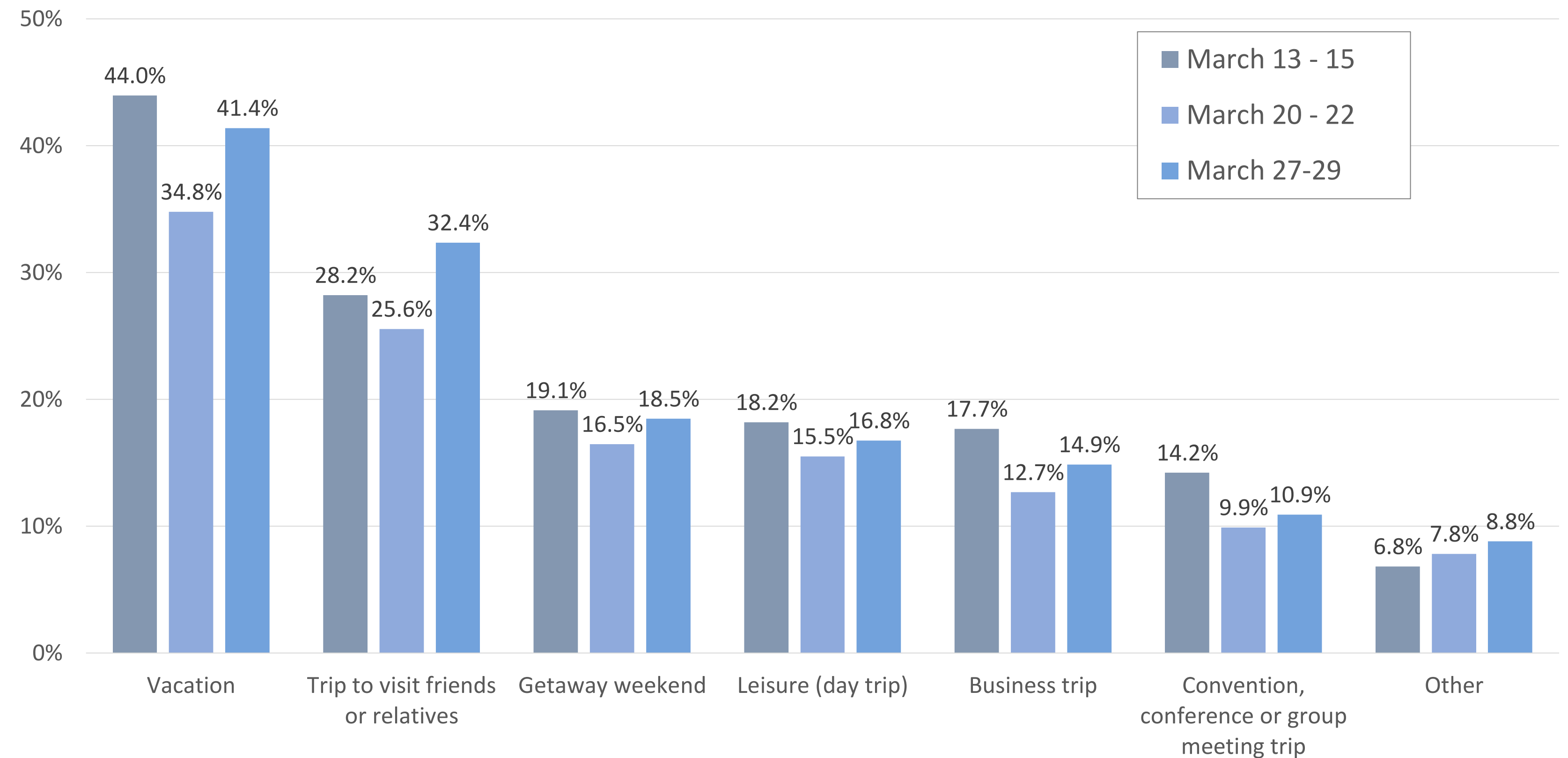
(Base: Cancelling trips , 292,477 and 506 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

Types of Trips Postponed

This week, postponements of vacations and trips to visit friends and relatives jumped sharply.

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

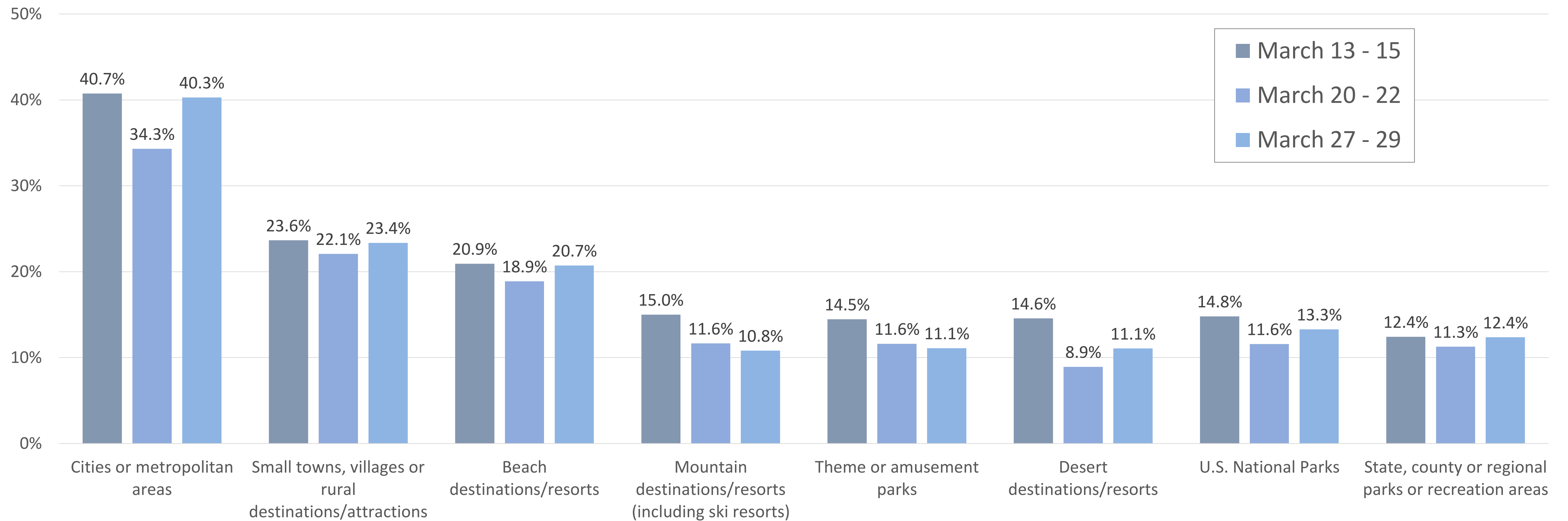
(Base: Postponing trips , 277, 354 and 404 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



Type of Destination Being Postponed

Urban areas are also the most postponed destination type.

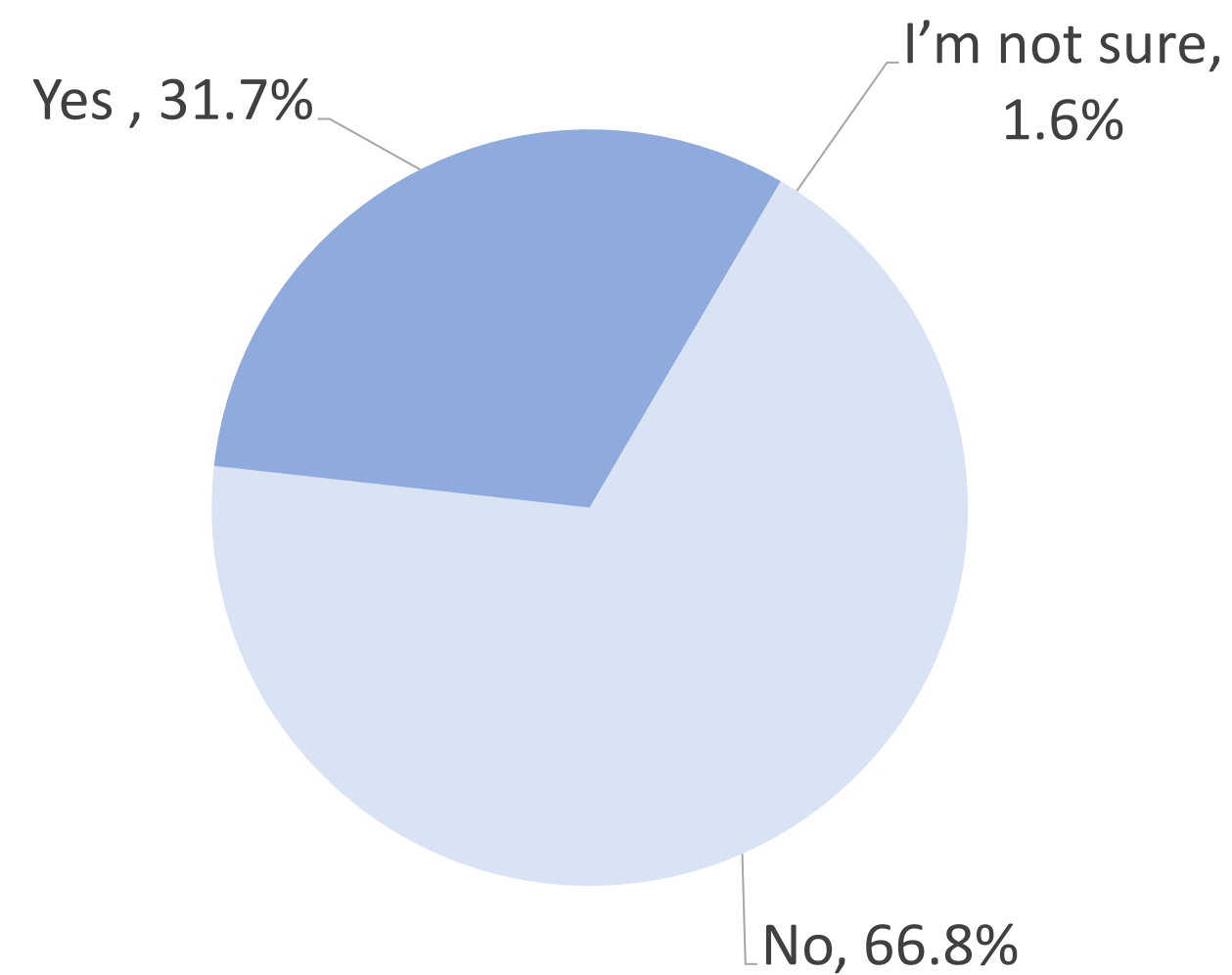
Question: Thinking about these canceled or postponed trips, which destination types were you planning to visit but ended up postponing or canceling? (Select all that apply)



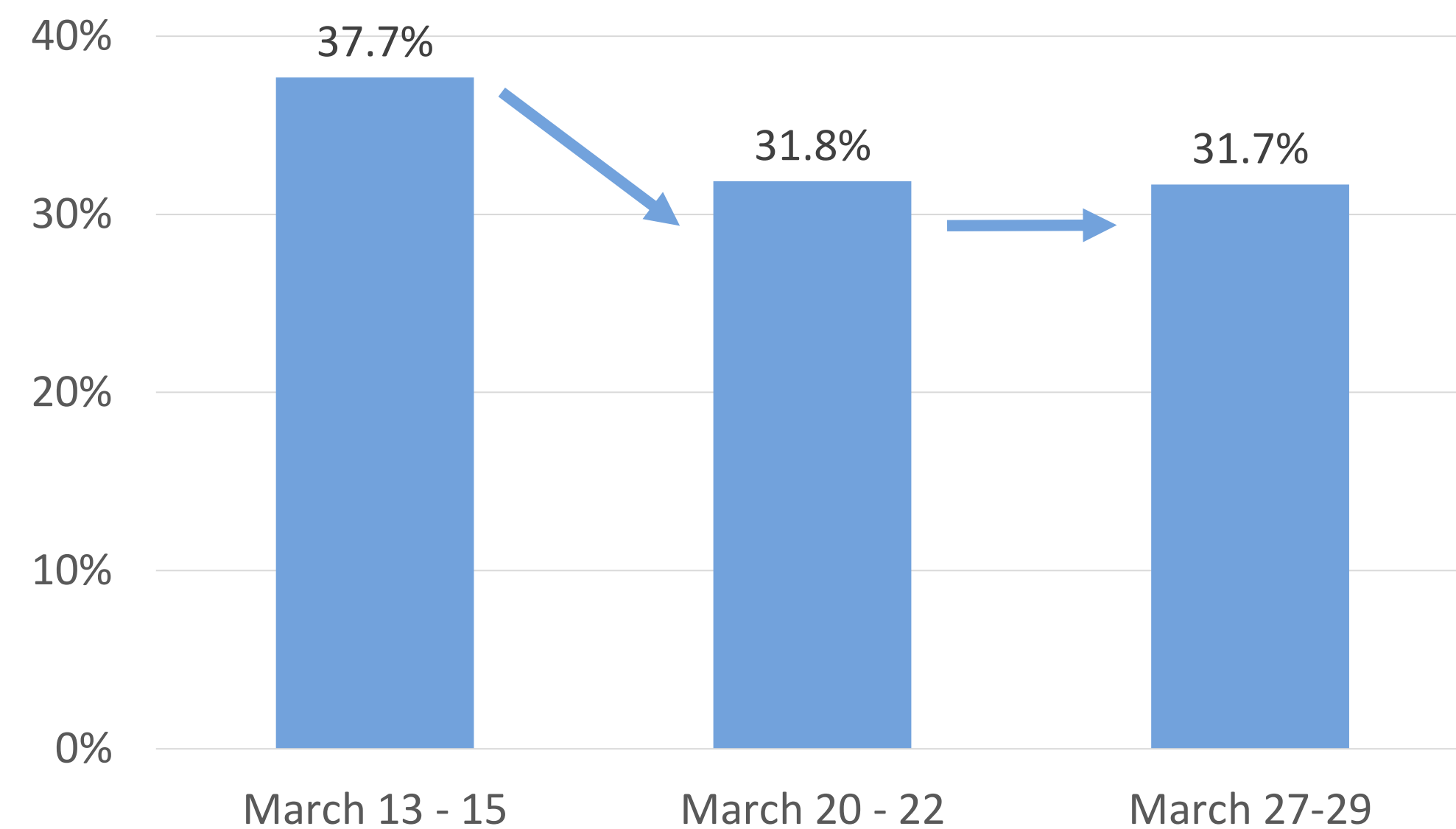
(Base: Postponing trips , 277, 354 and 404 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

International Trips Postponed and Cancelled

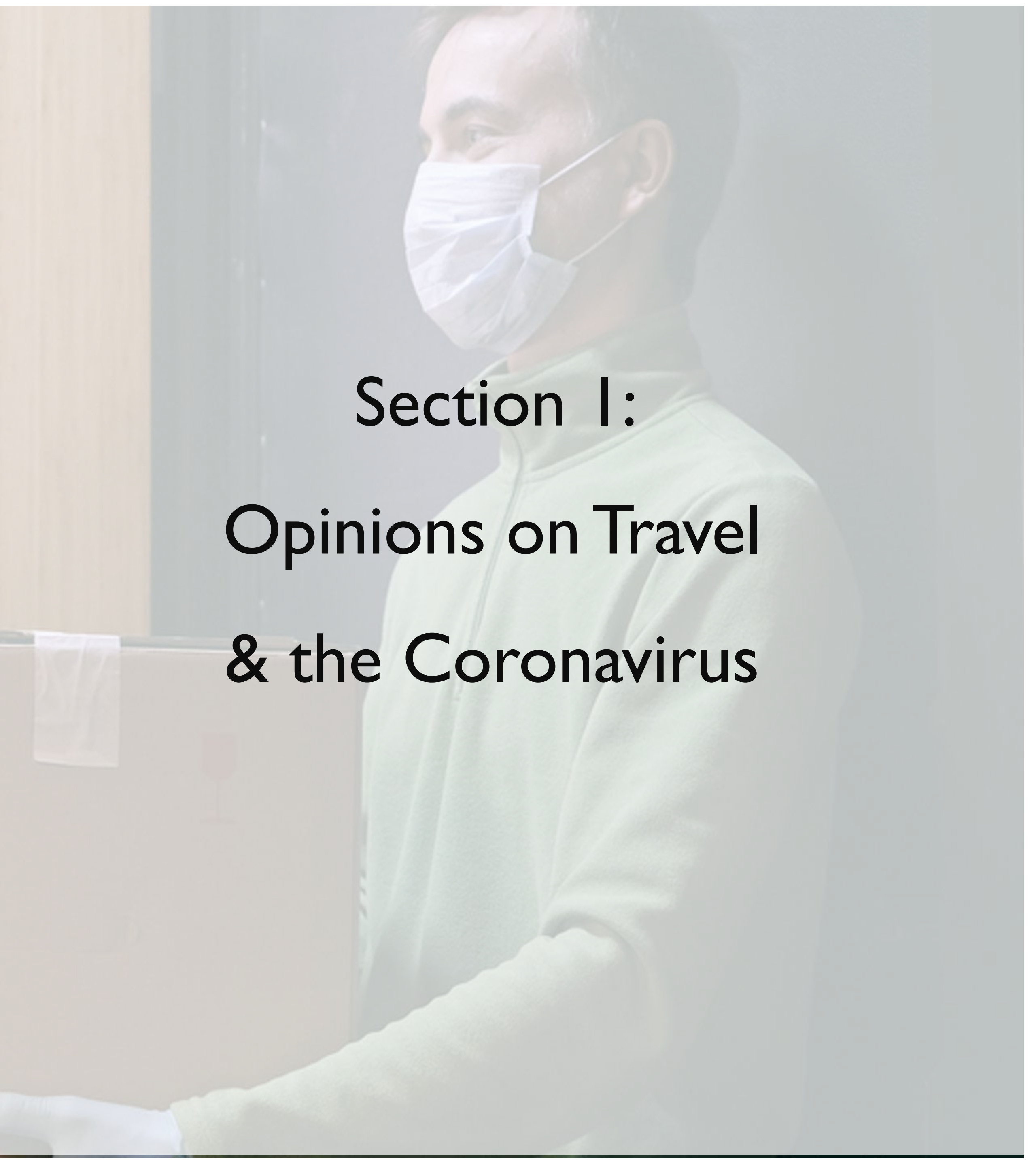
Question: Were any of the trips you canceled or postponed foreign trips (i.e., travel to countries outside the United States)?



Almost one third (31.7%) of those postponing or cancelling a trip did so for a trip to a foreign country, down from 31.8 percent last week.



(Base: Respondents cancelling or postponing a trip, 795 completed surveys. Data collected March 27-29, 2020)

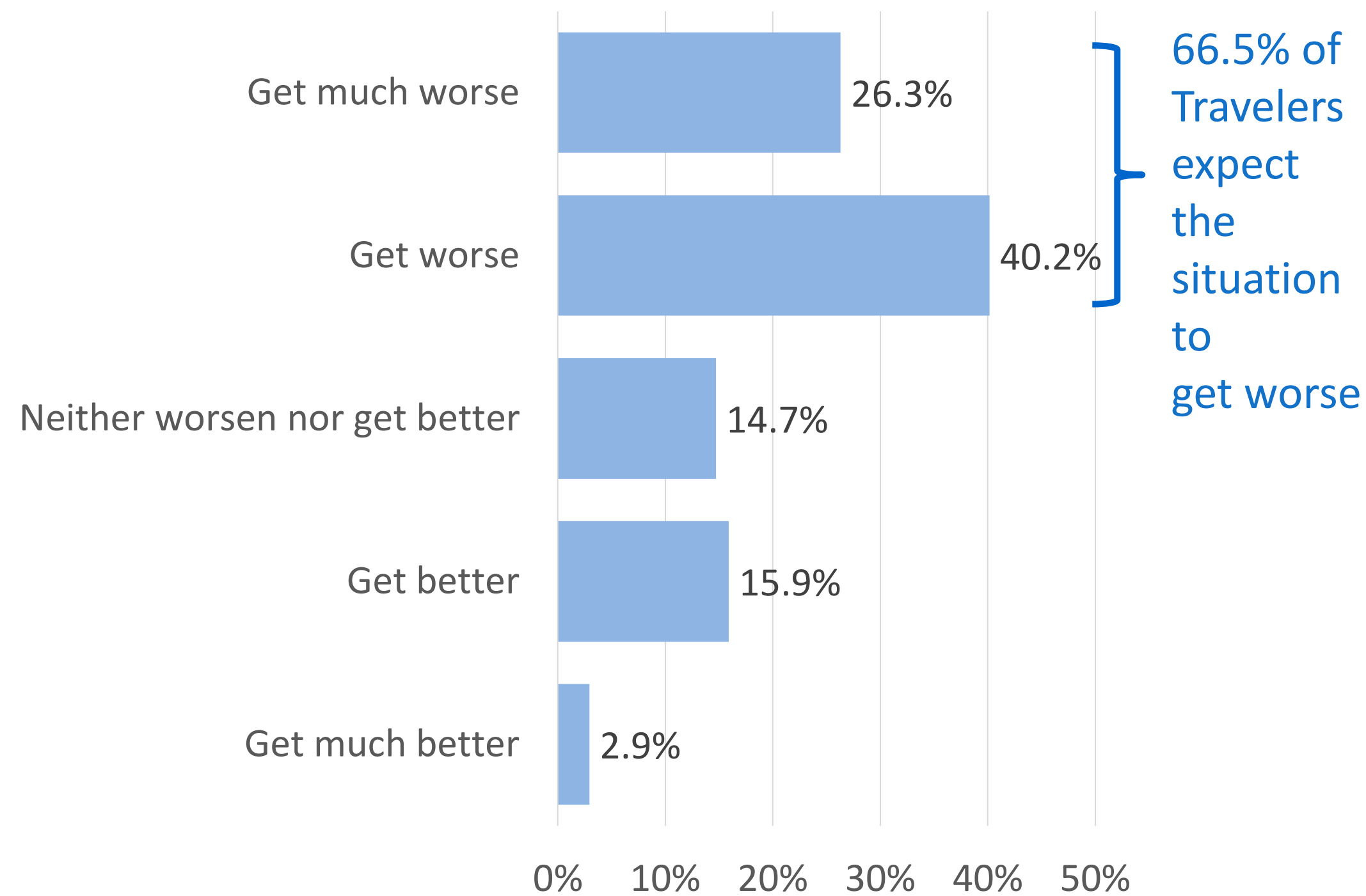


**Section I:
Opinions on Travel
& the Coronavirus**

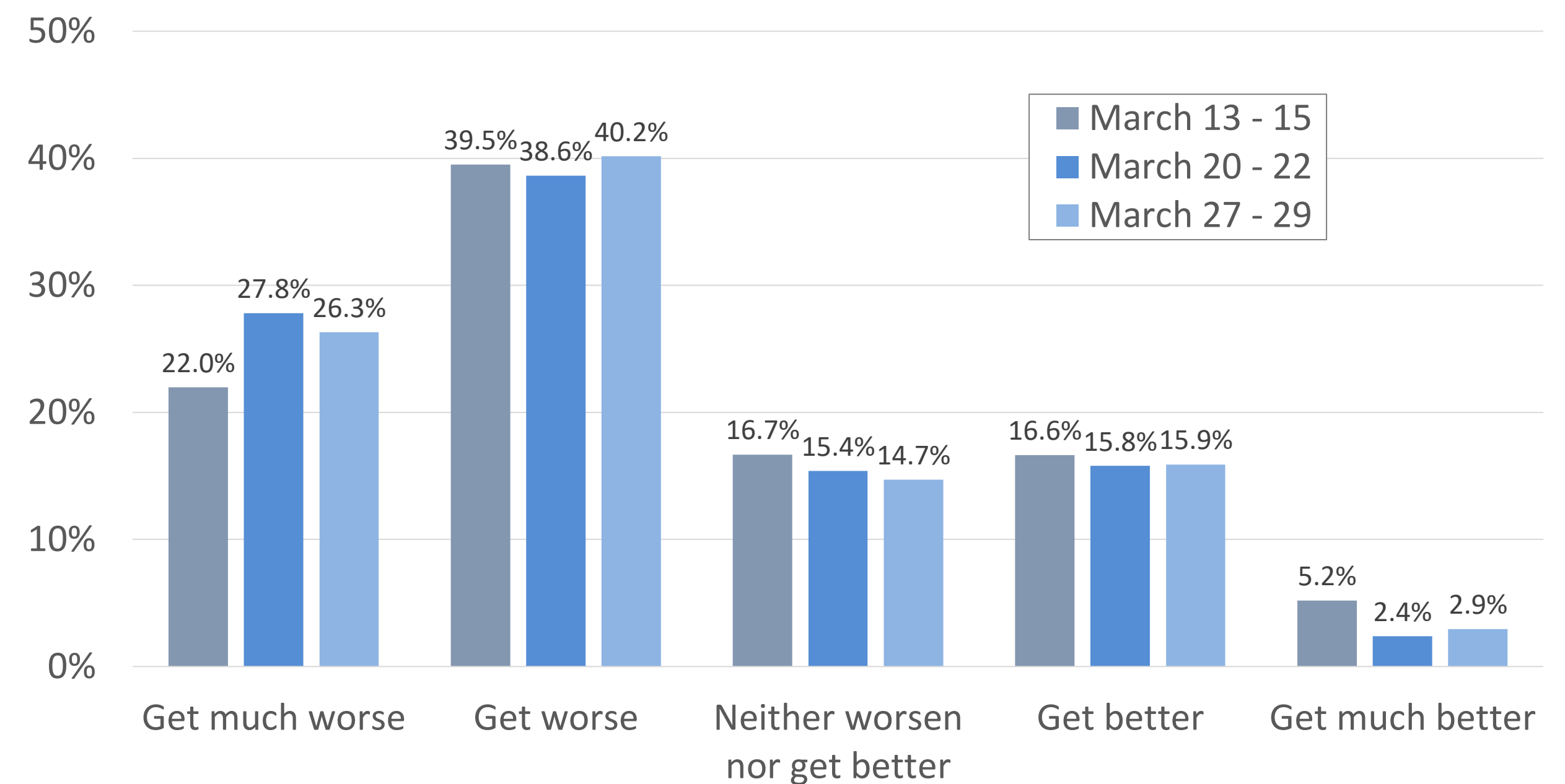
Expectations for Coronavirus Outbreak

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, traveler expectations for the future of the virus situation were unchanged. Again, 2-in-3 travelers expect the Coronavirus situation to get worse in the next month.



(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, 2020 and March 27-29, 2020)

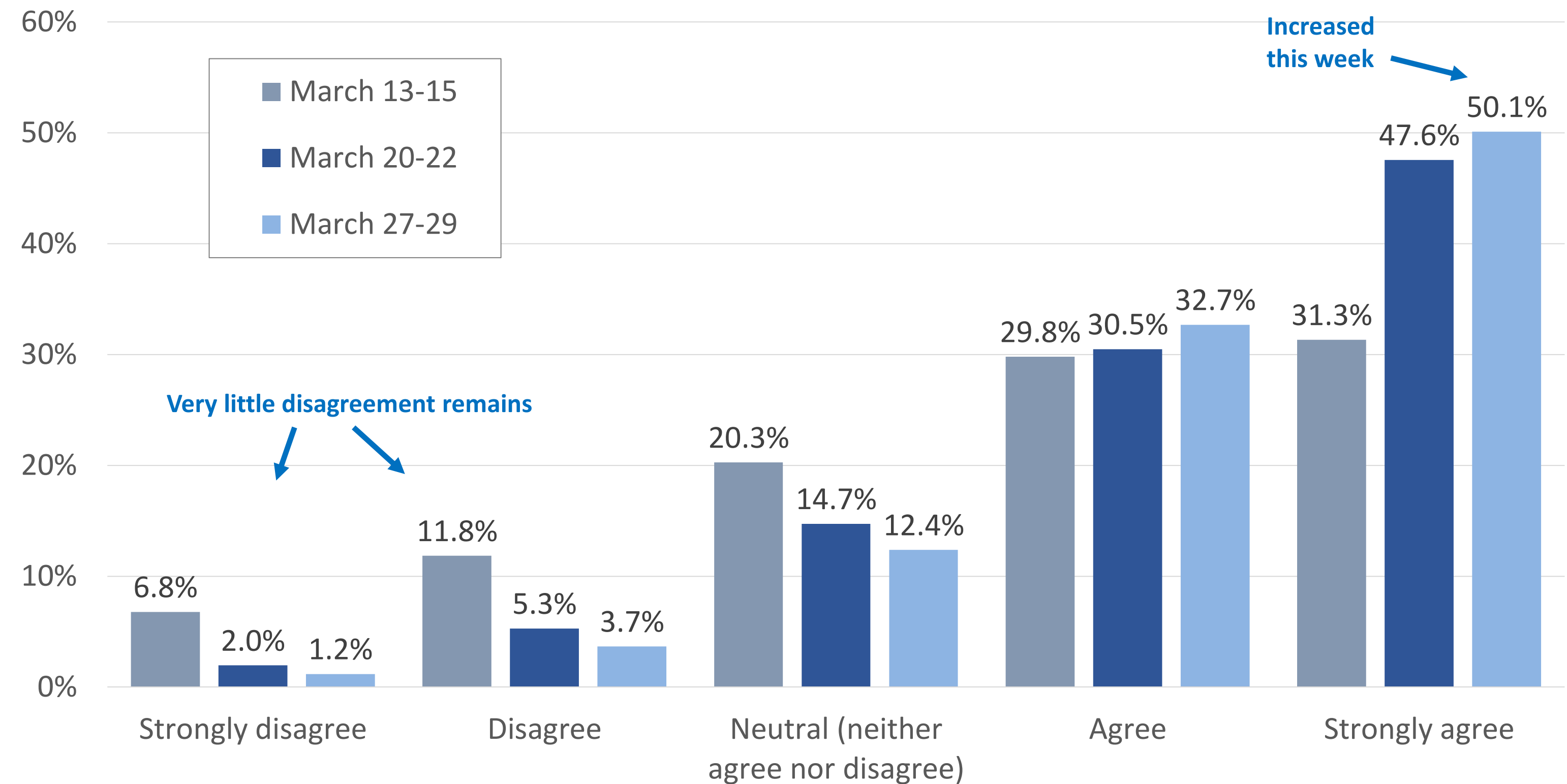
Avoiding Travel Until the Crisis Blows Over

Now, 82.8 percent of American travelers say they are done traveling until the Coronavirus situation 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 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



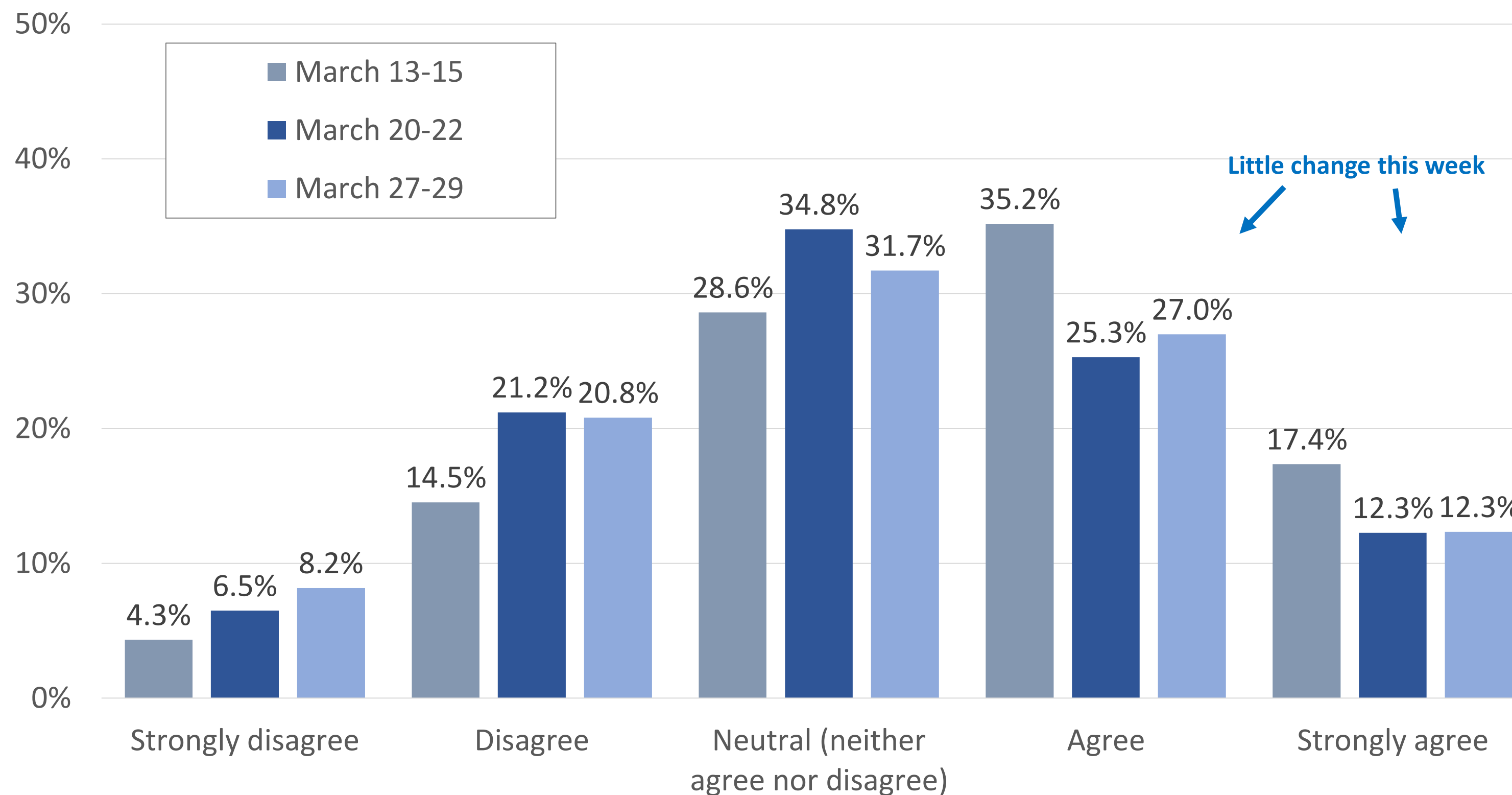
Expectations for Summer Travel Season

Last week about a third of travelers (37.5%) saw the Coronavirus situation resolving itself before summer. Similarly, this week about 4-in-10 (39.3%) 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, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



Staycations as a Replacement for Vacations

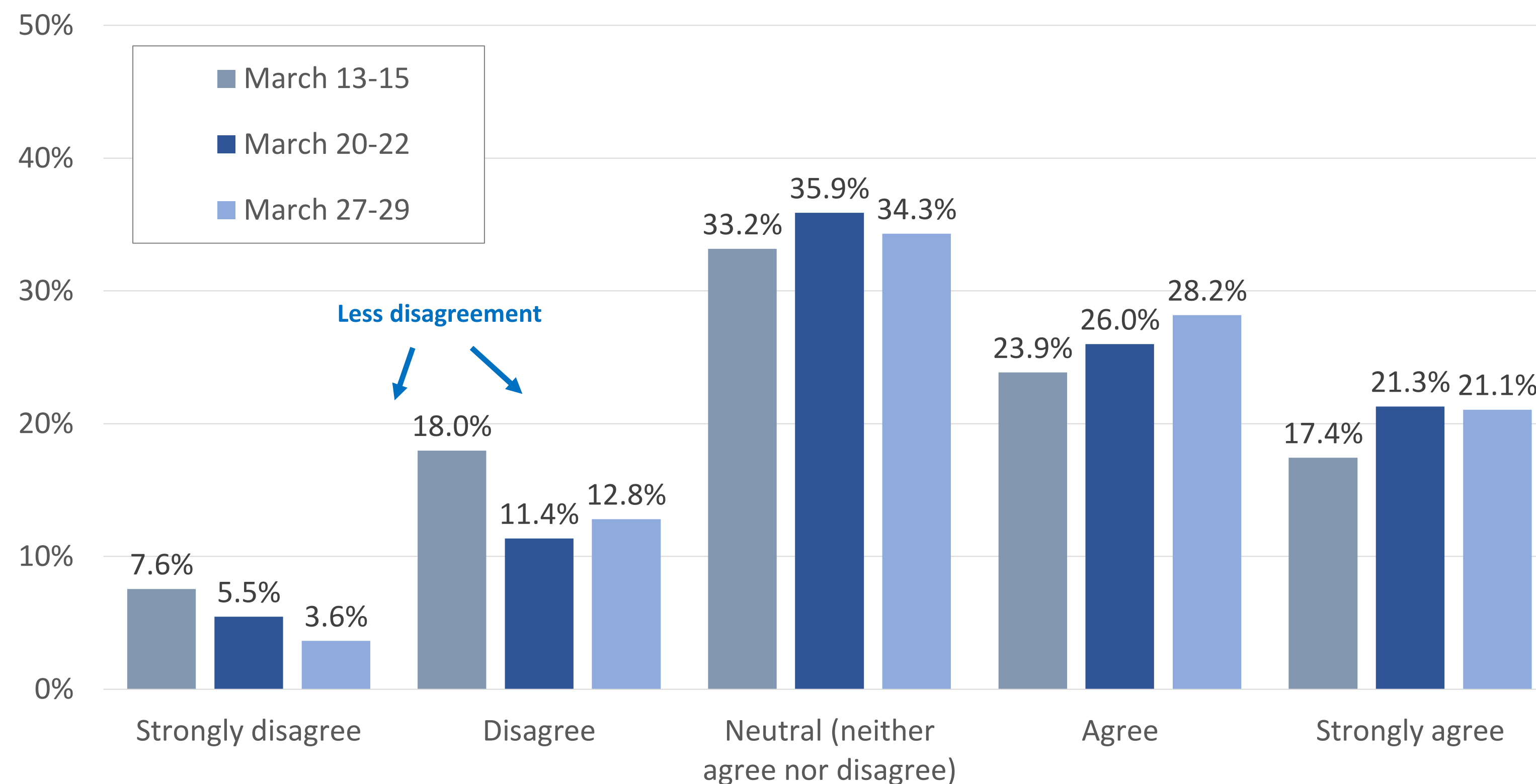
About half of American travelers are considering switching to a staycation (from a vacation) this summer as a result of the coronavirus.

One week ago, 47.3 percent “Agreed” or “Strongly agreed” that they’d probably take a staycation rather than a vacation. The figure is now 49.2 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, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



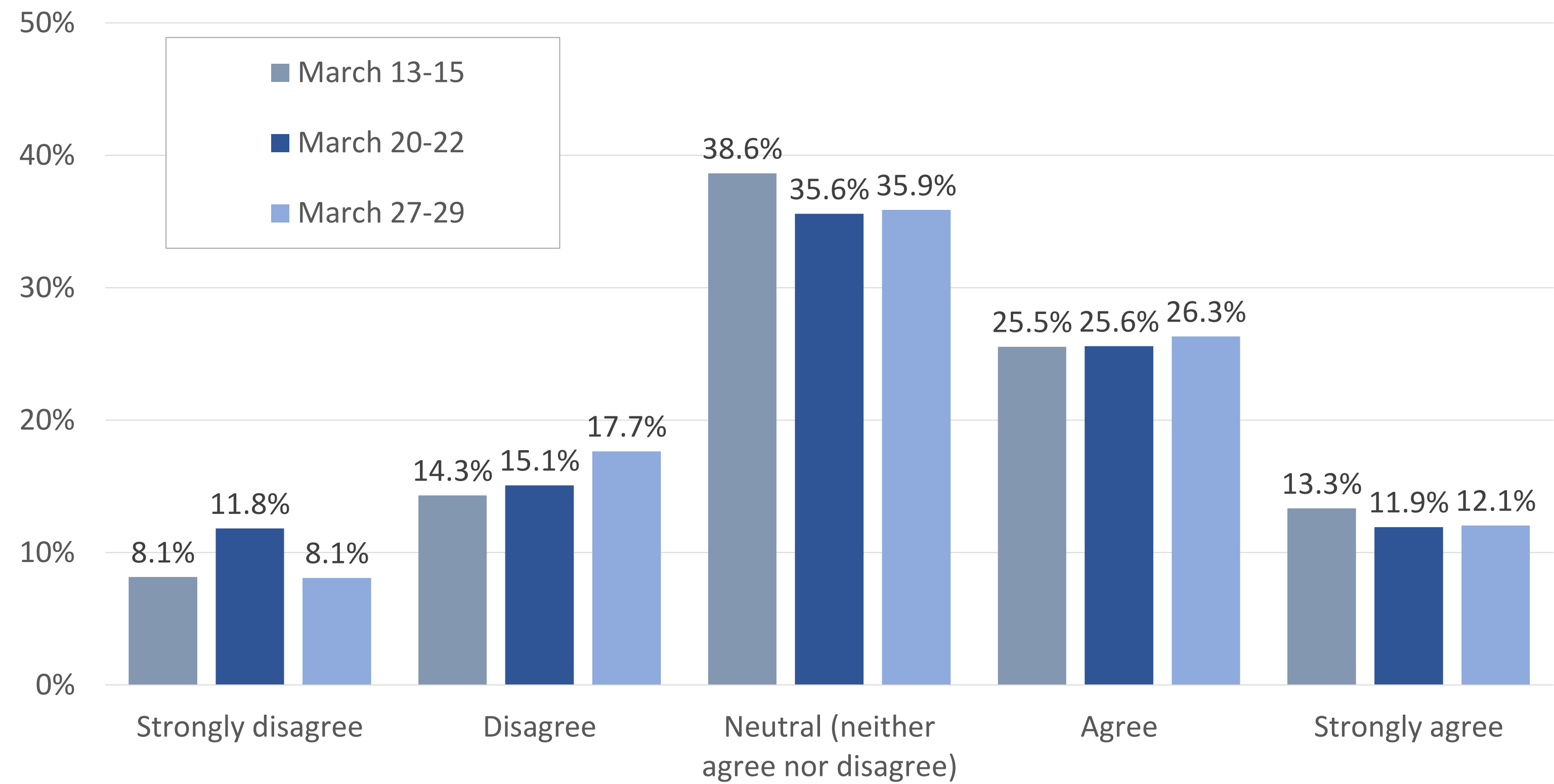
Replacing Air Travel With Road Trips

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 from last 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, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



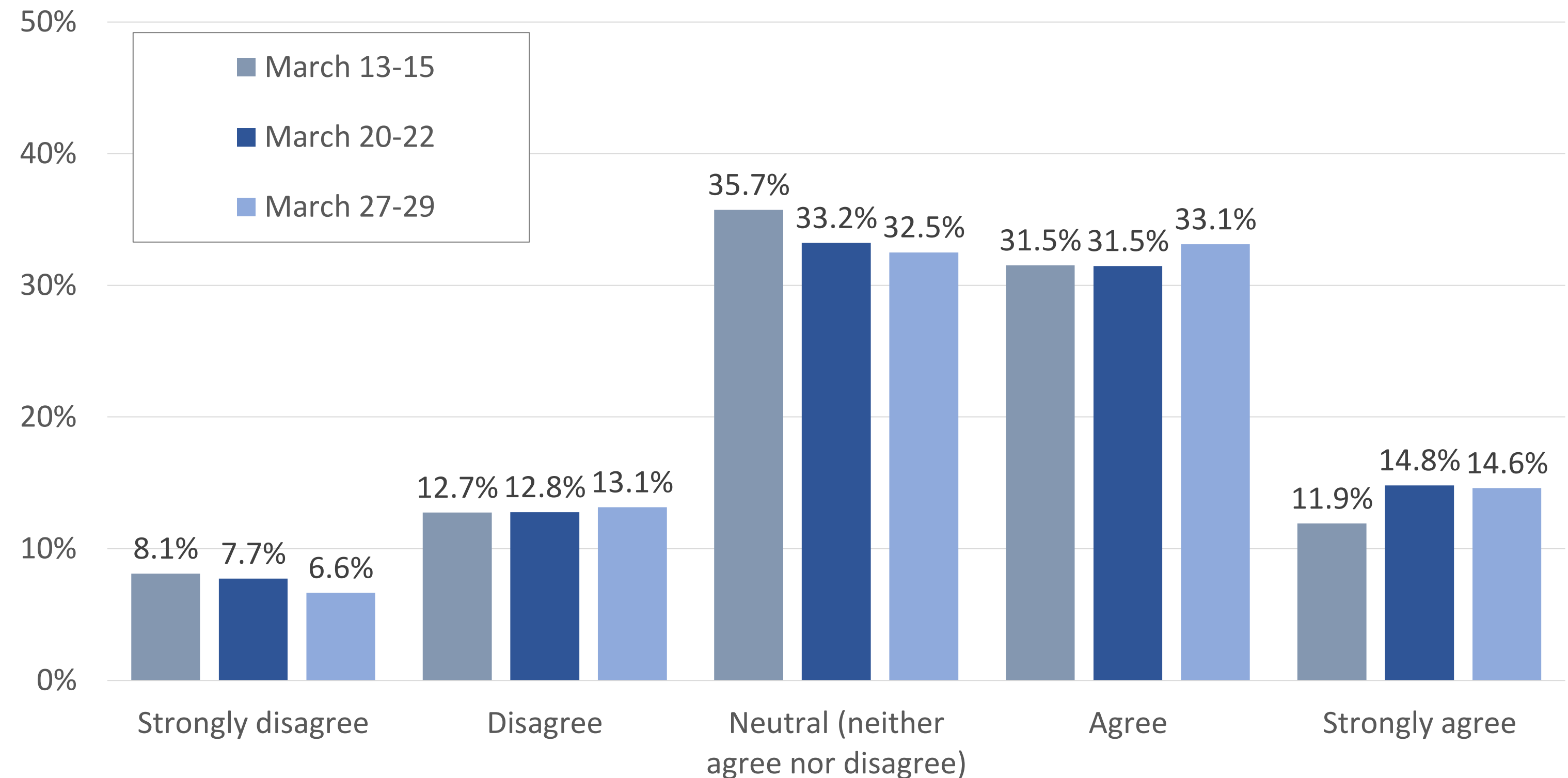
Replacing Long-haul Travel with Regional Trips

Similarly, 47.7 percent of American travelers “Agree” or “Strongly agree” that they’ll probably be taking more regional trips while avoiding long-haul trips. This result has changed little over the three waves of this project.

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 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



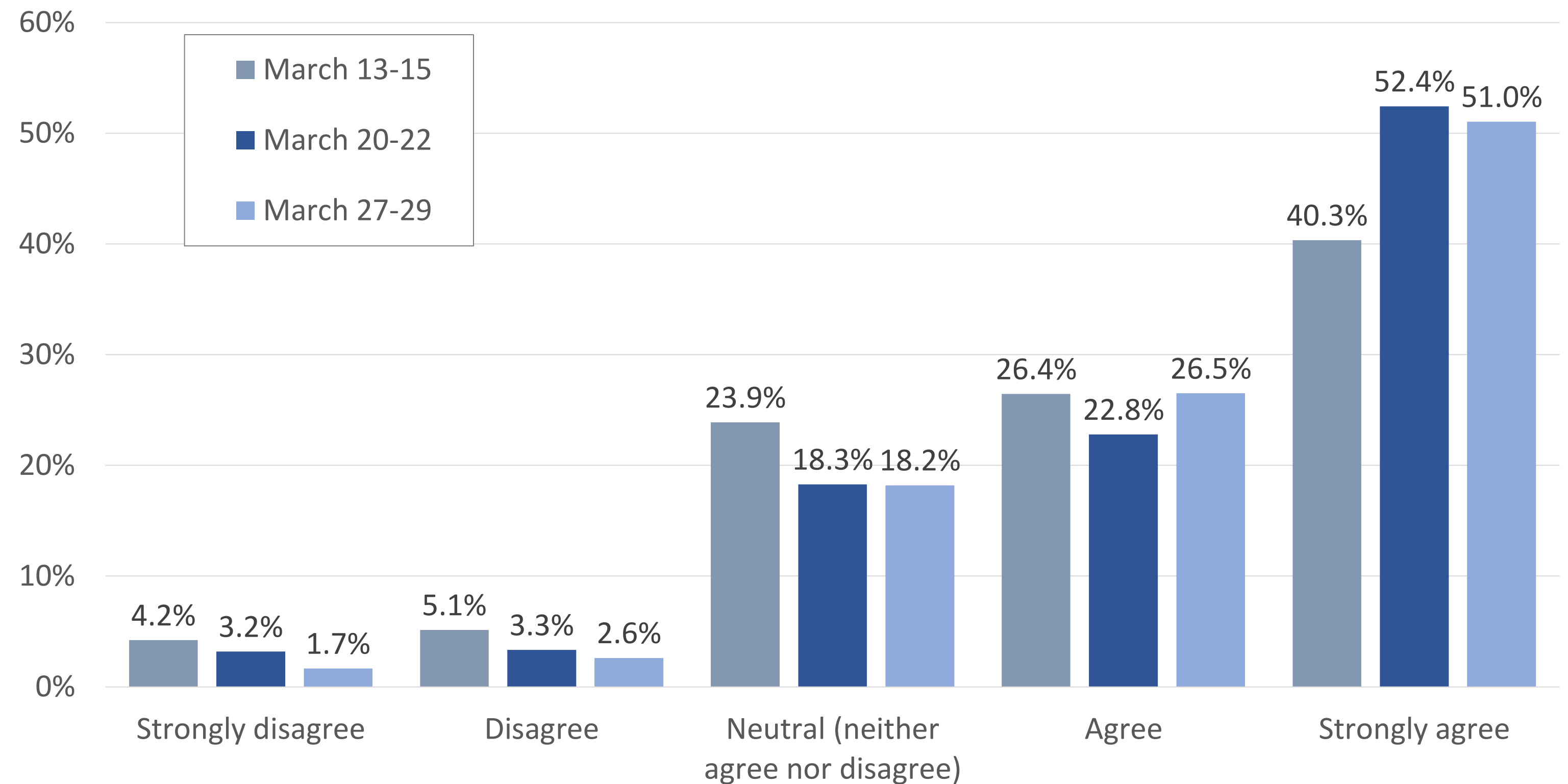
Avoiding Conventions & Conferences

Enthusiasm for attending meetings in the current environment is extremely low. Nearly 8-in-10 travelers (77.5%) now say they will be unlikely to attend these events until the Coronavirus situation is over.

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 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



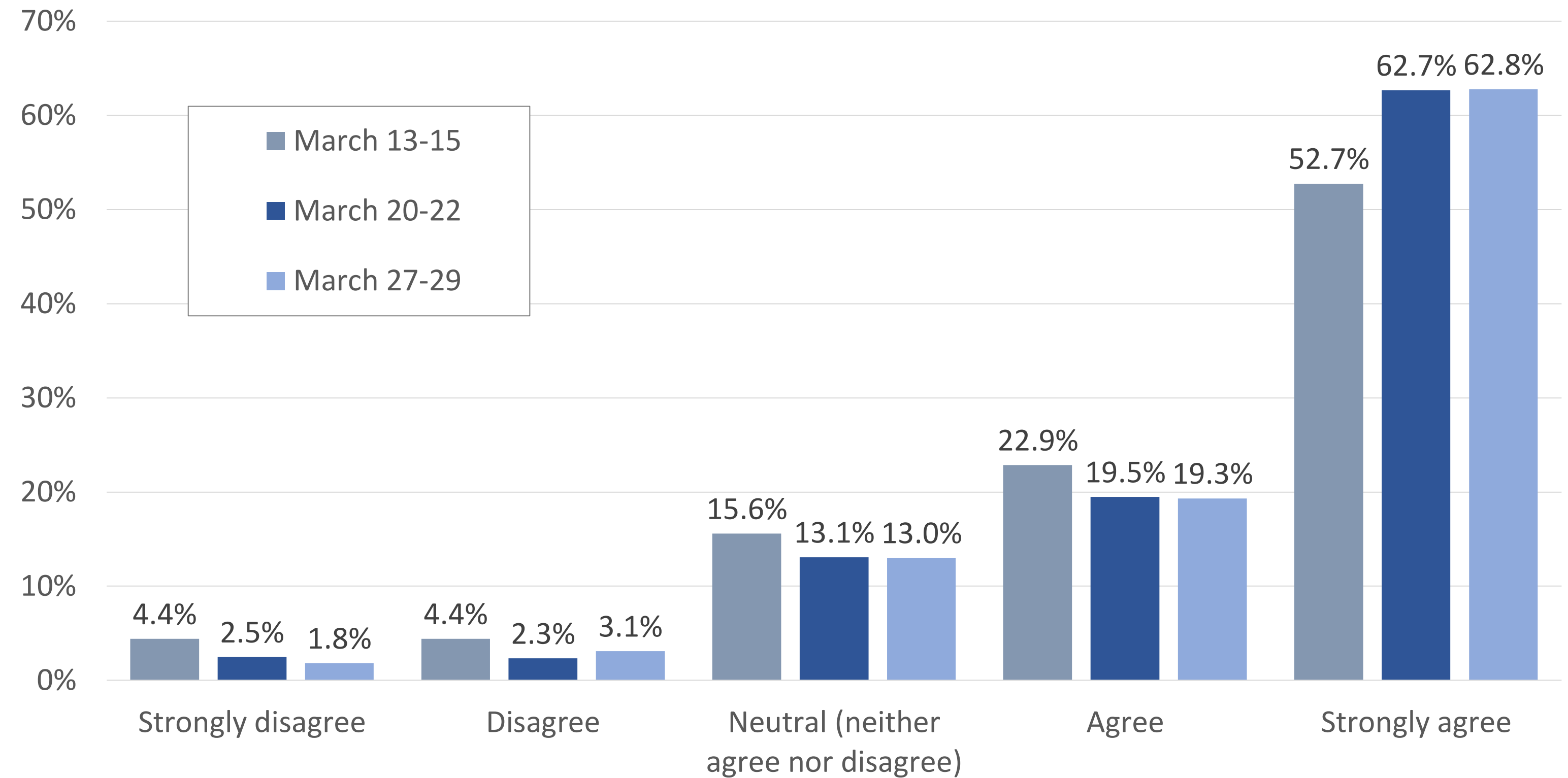
Avoiding International Travel

4-in-5 American travelers (82.1%) said they're unlikely to travel outside the U.S. until the Coronavirus situation is resolved, unchanged from last week.

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 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



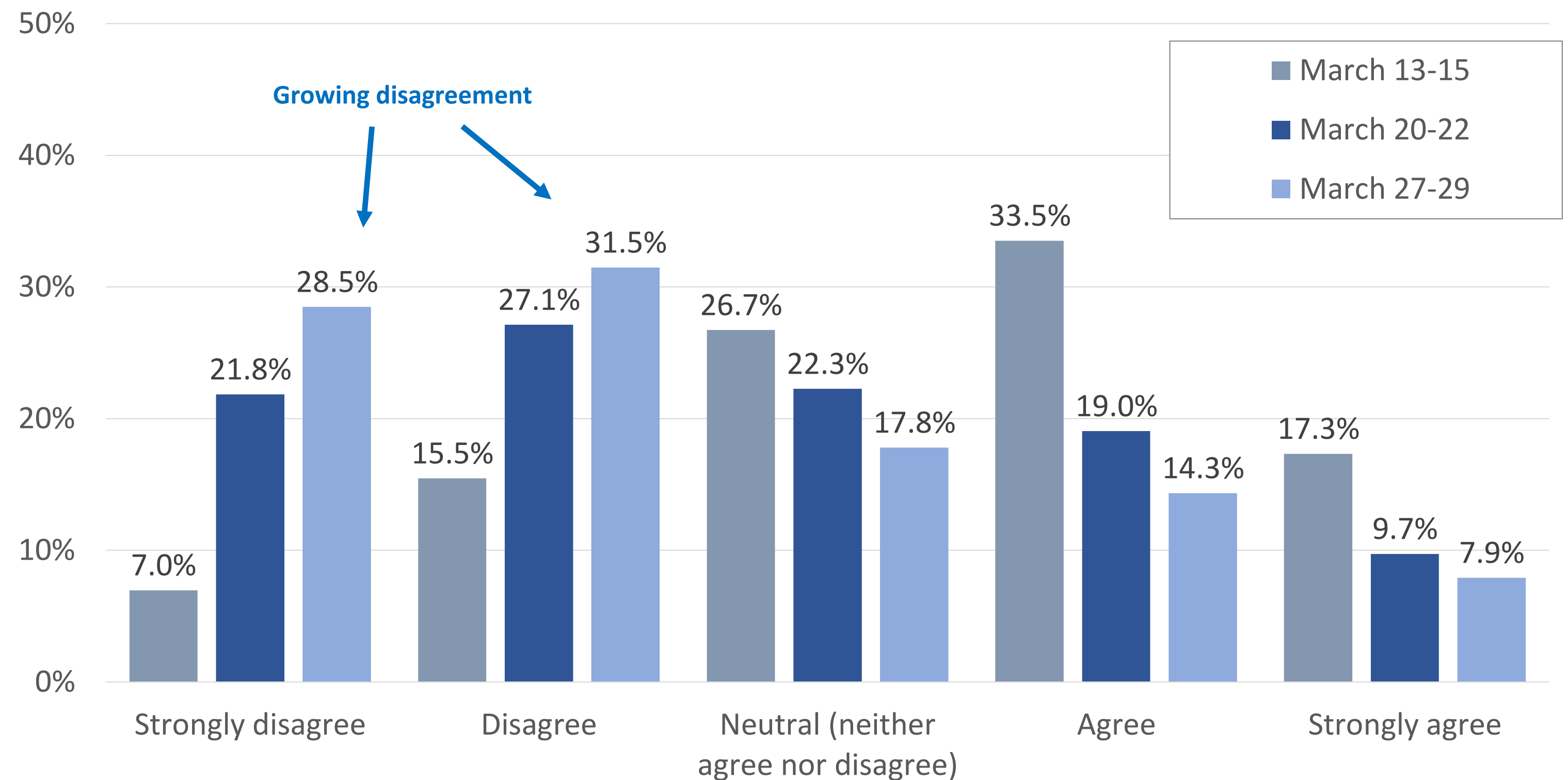
Comfort Enjoying Home Community

American's comfort in going out in their own communities to enjoy themselves is steadily declining. Last week just over one quarter (28.8%) of American travelers said they felt comfortable doing this. Now just over 1-in-5 (22.3%) 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, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



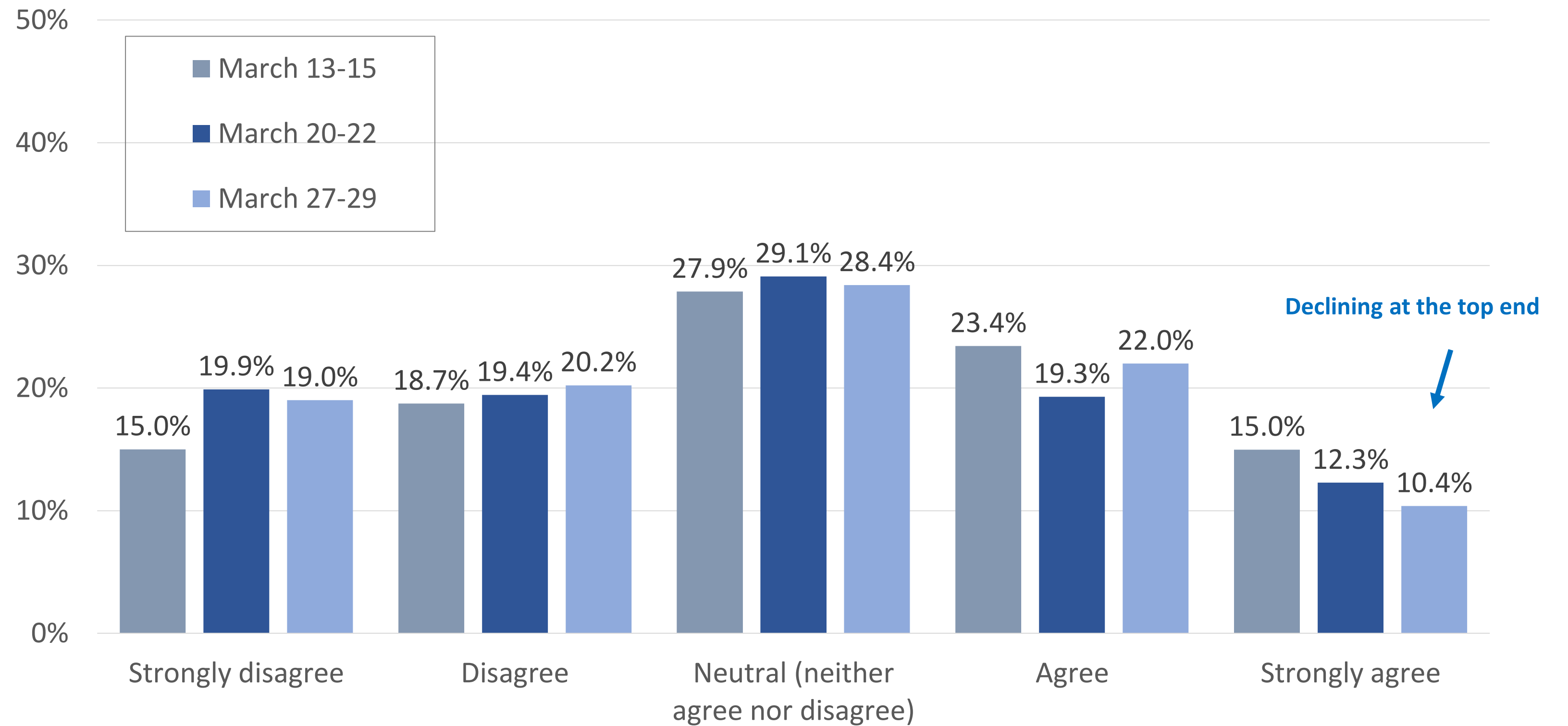
Discounts and Price Cuts

Price cuts and discounts to stimulate travel resonate with approximately 1-in-3 American travelers. When asked if price cutting made traveling in the next three months more interesting, 32.4 percent now 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, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



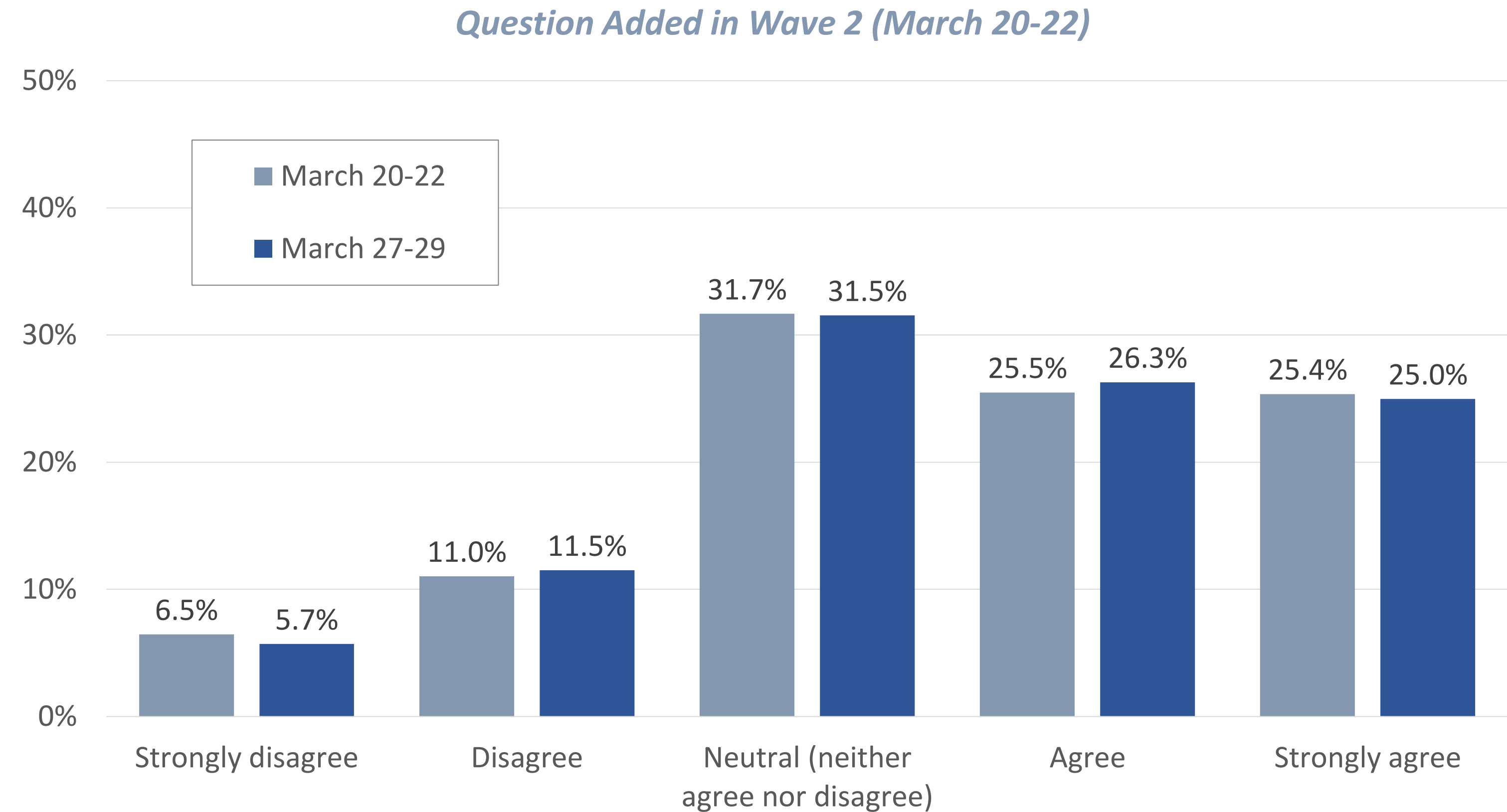
Travel Shaming

Half of Americans (51.3%) feel that persons traveling now should be feel ashamed of this behavior. Only 17.2 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 and 1,201 completed surveys. Data collected March 20-22, and 27-29, 2020)



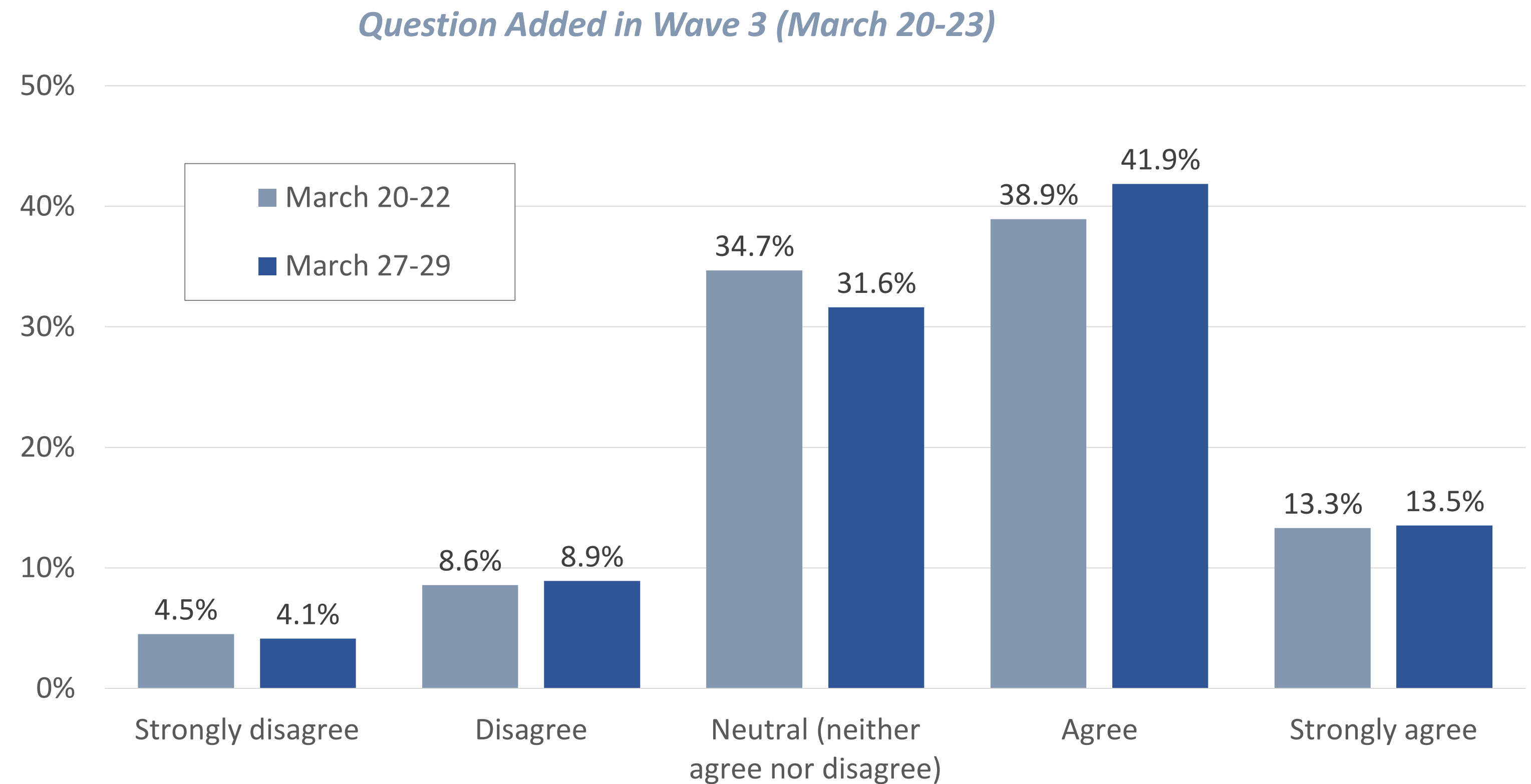
Supporting Local Businesses

More than half of American travelers (55.4%) 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.

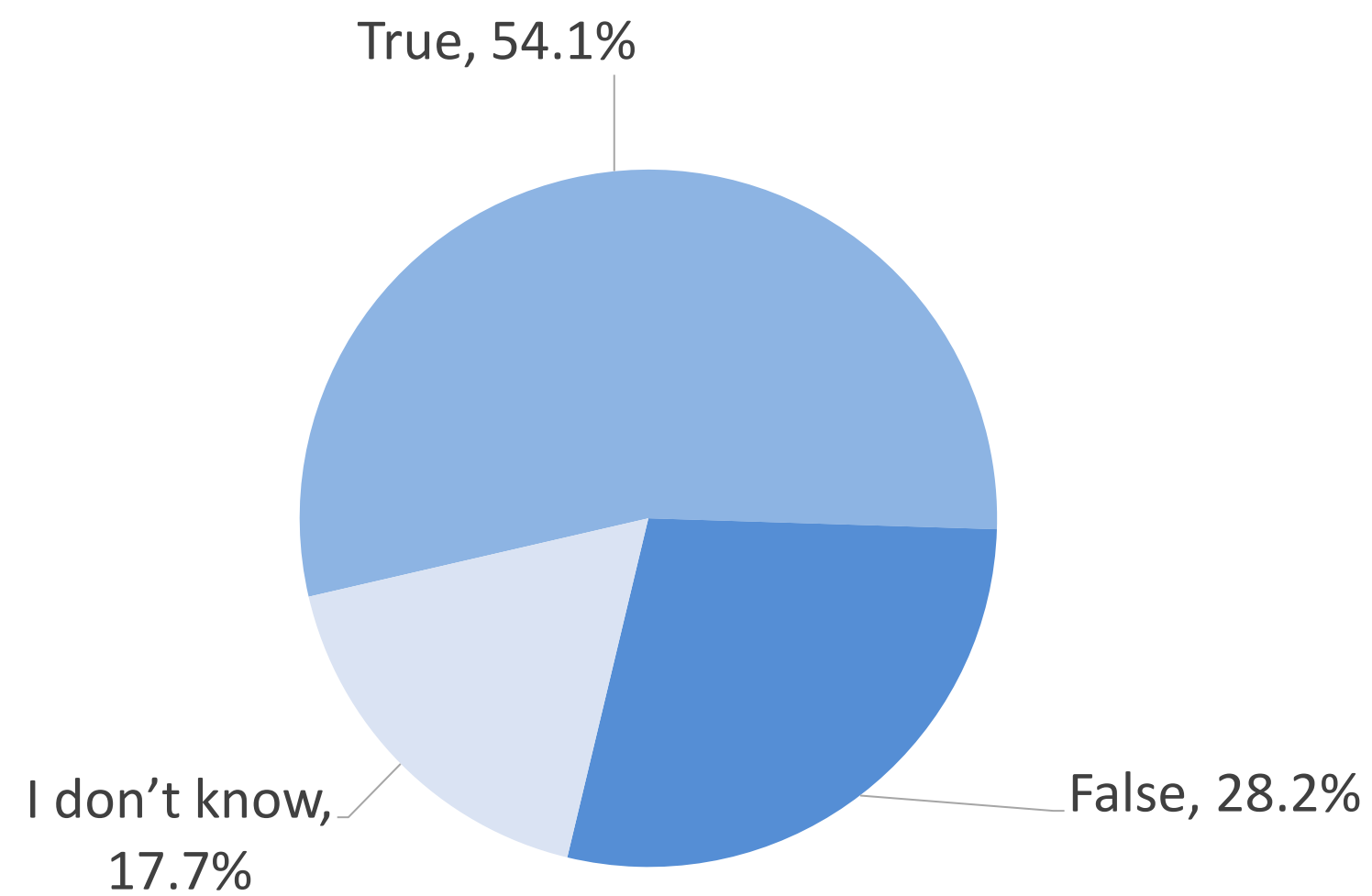
((Base: All respondents 1,200 and 1,201 completed surveys. Data collected March 20-22, and 27-29, 2020))



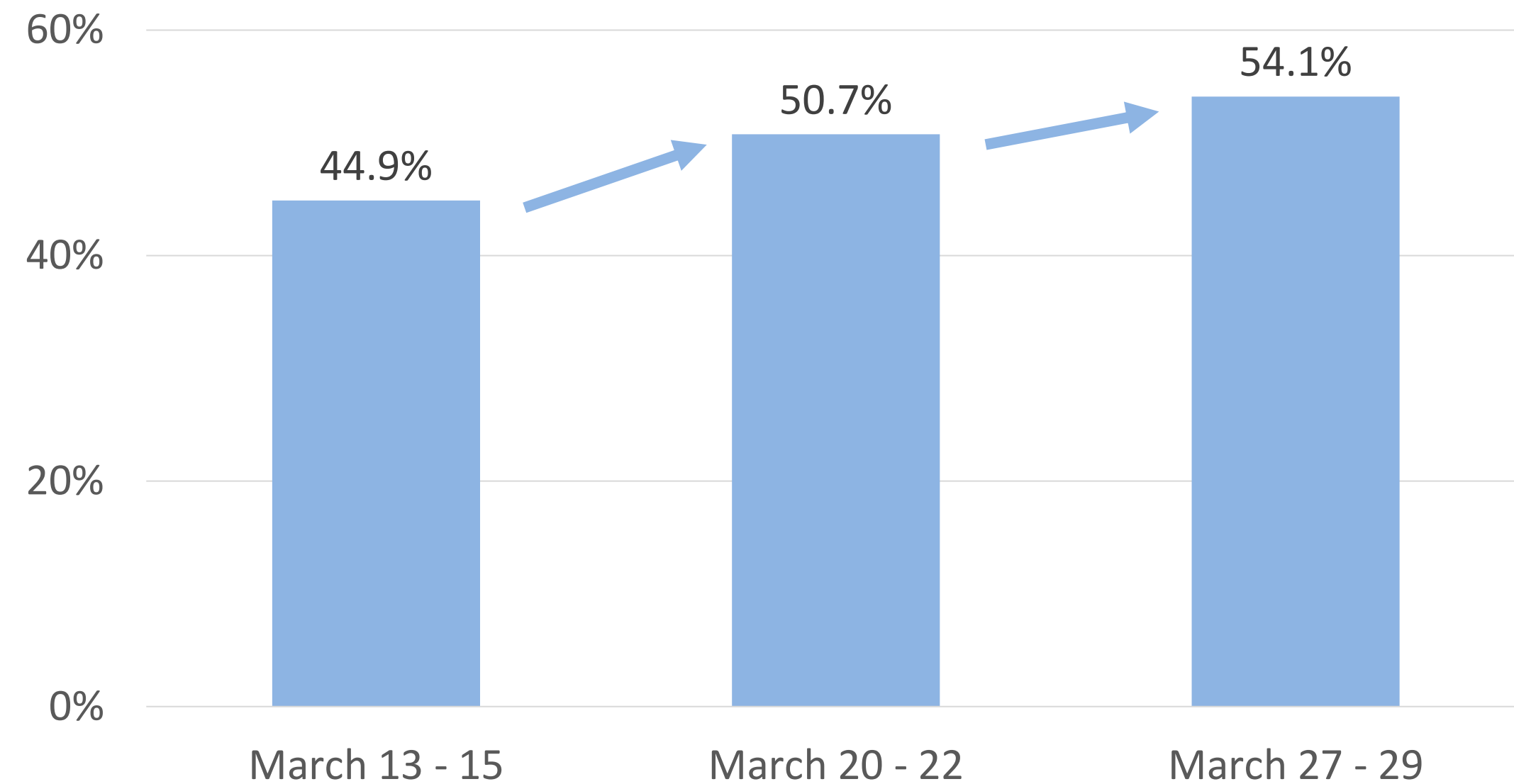
Business Travel Restrictions

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

Wave 3 (March 27-29)



Over half of employed American travelers (54.1%) say their employer has put travel restrictions into effect, up from last week.

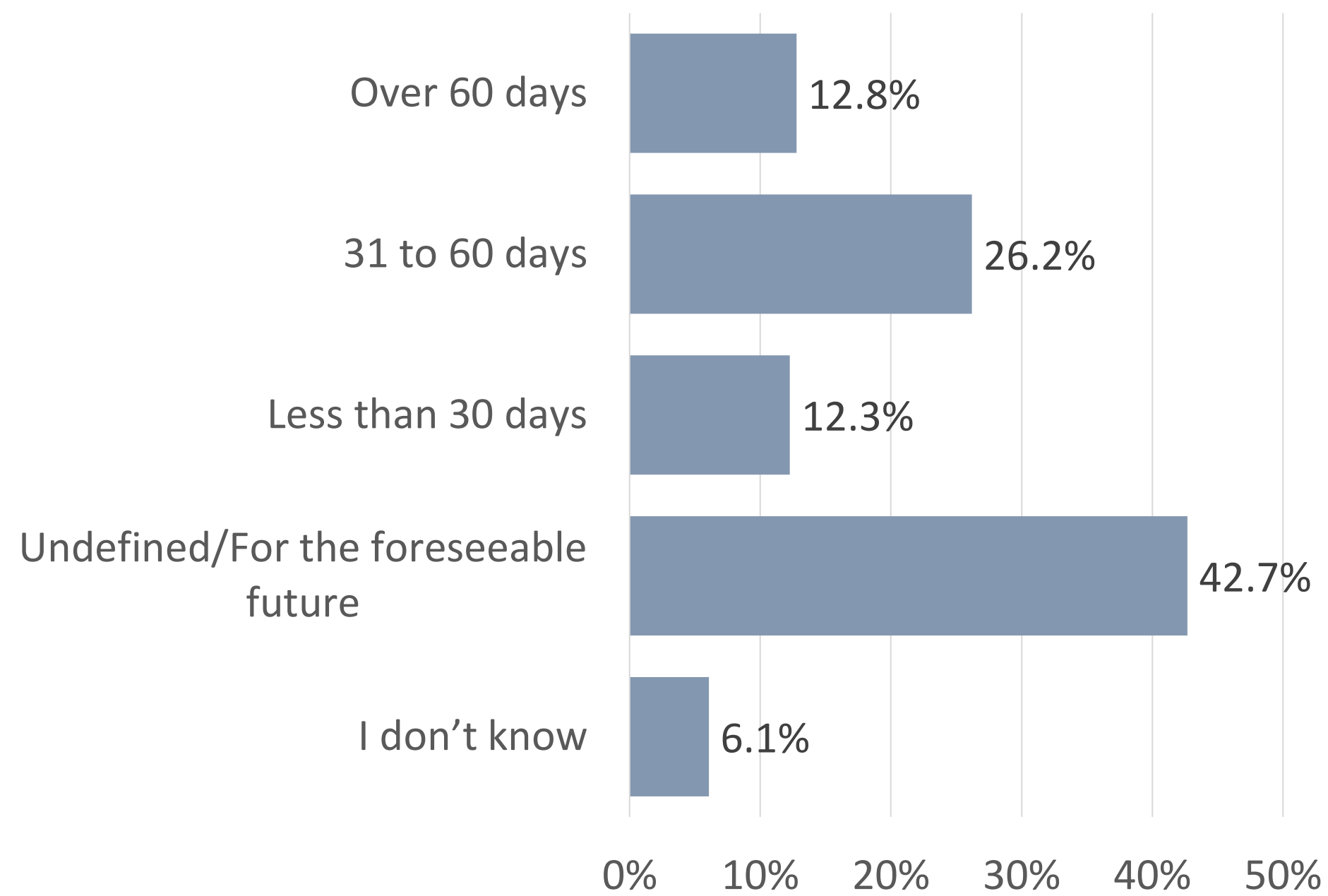


(Base: Employed respondents, 909, 916 and 753 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

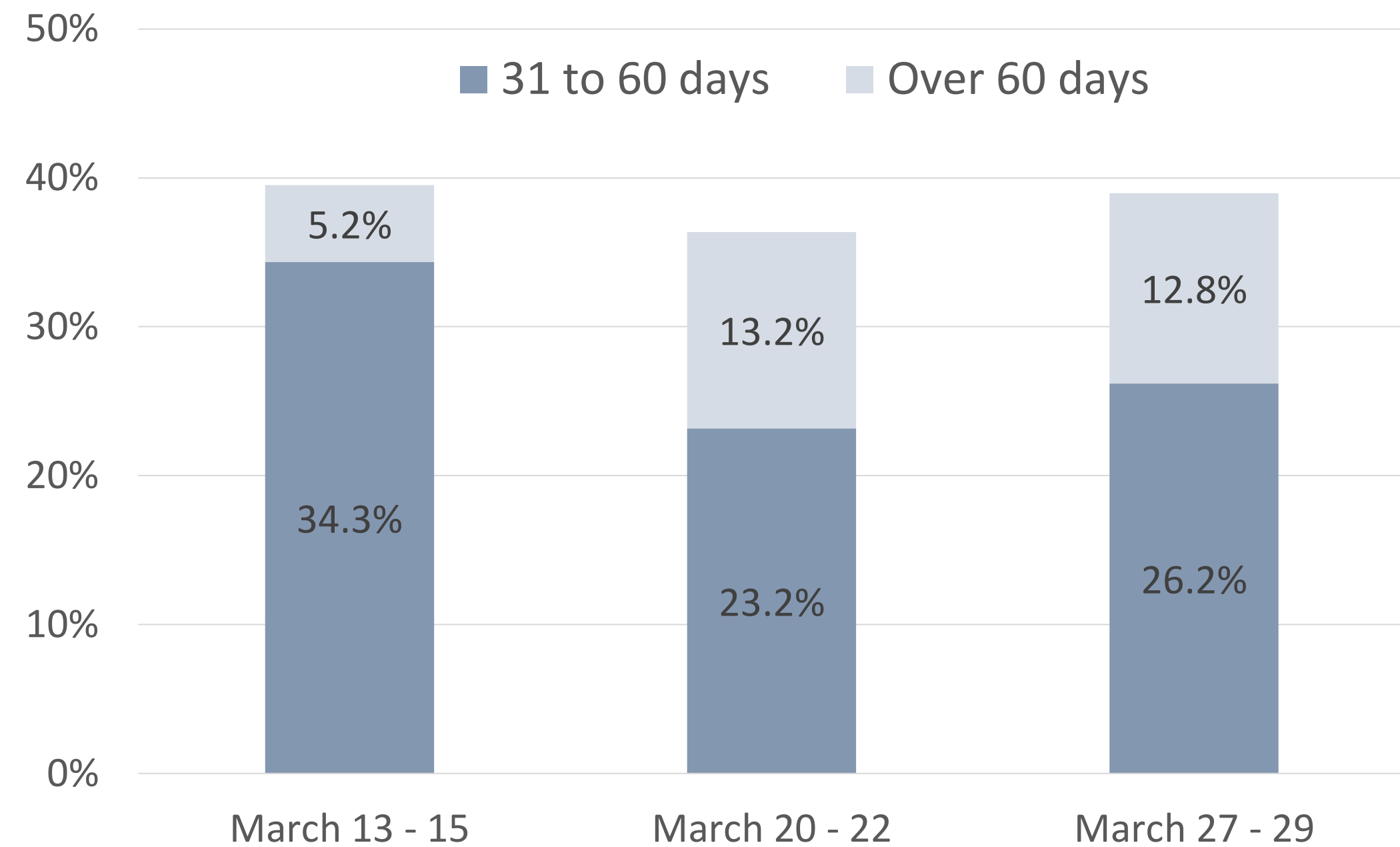
Business Travel Restrictions

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

Wave 3 (March 27-29)



Over a third of employed American travelers with employer-mandated restrictions (39.0%) say they will remain in place for at least a month.



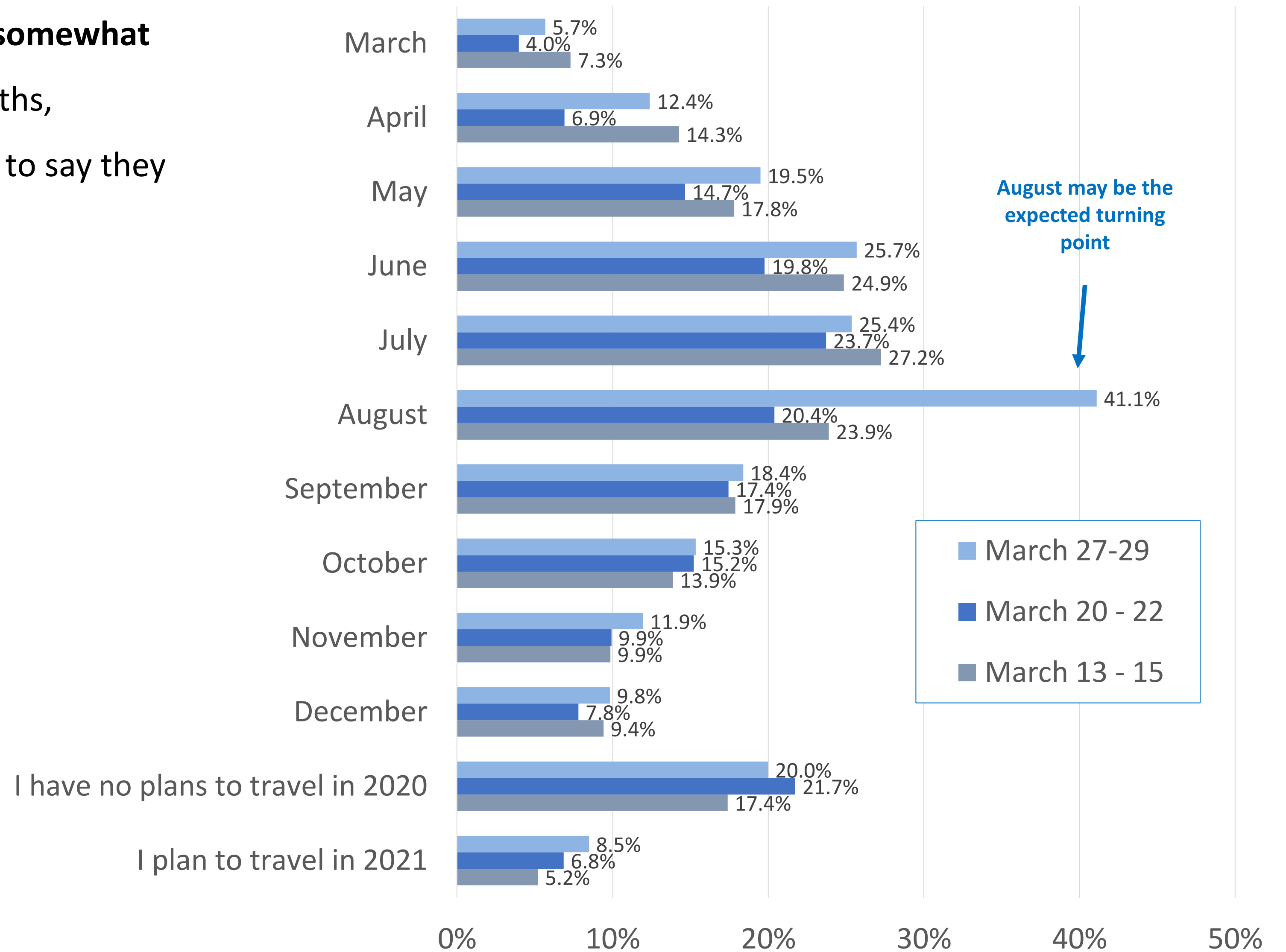
(Base: Employed respondents with travel restrictions, 488, 371 and 418 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

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: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

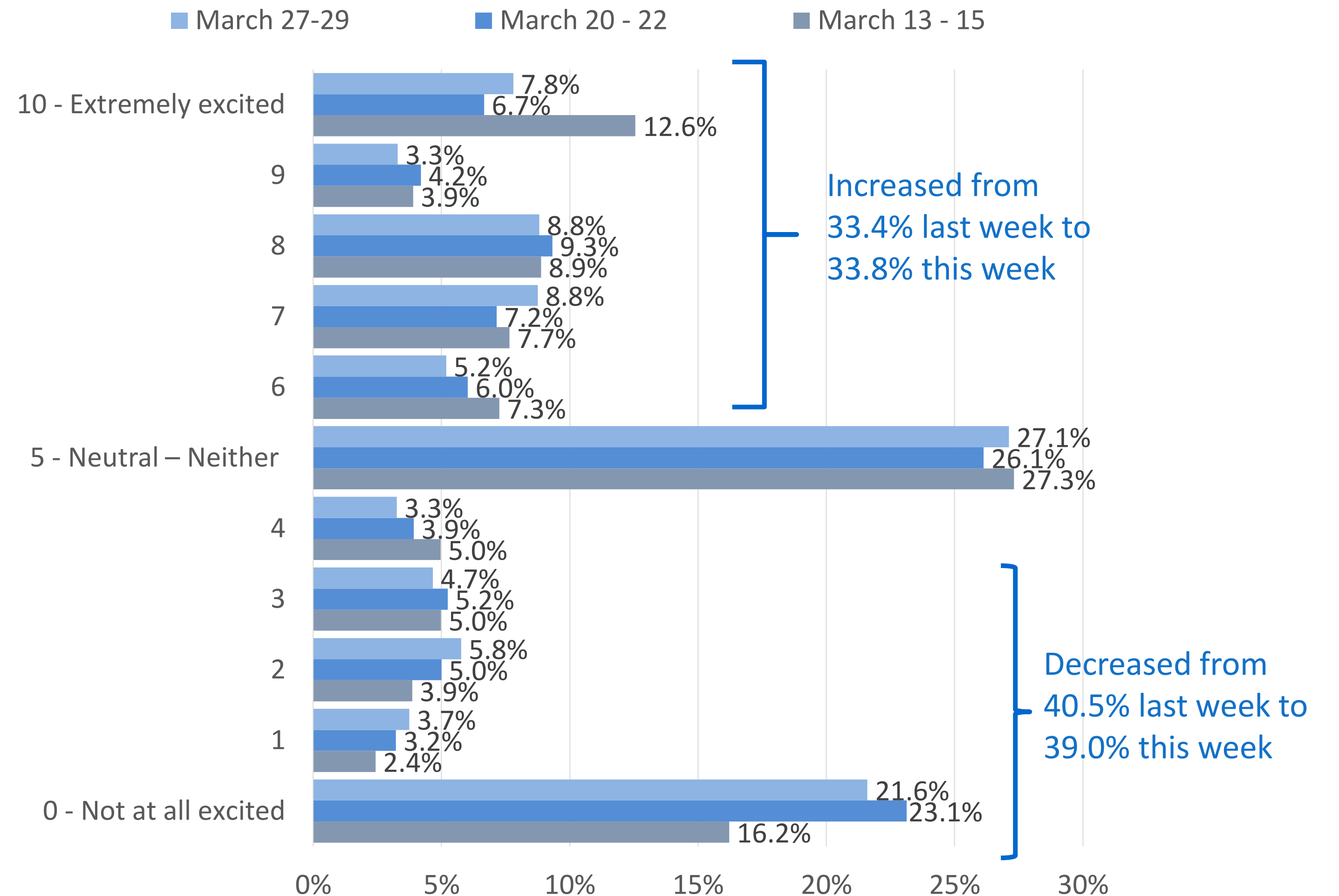


Openness to Travel Information

Travelers interest in learning about new travel experiences and destinations remains the same. This week, 1-in-3 travelers (33.8%) expressed some excitement about this topic.

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

(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



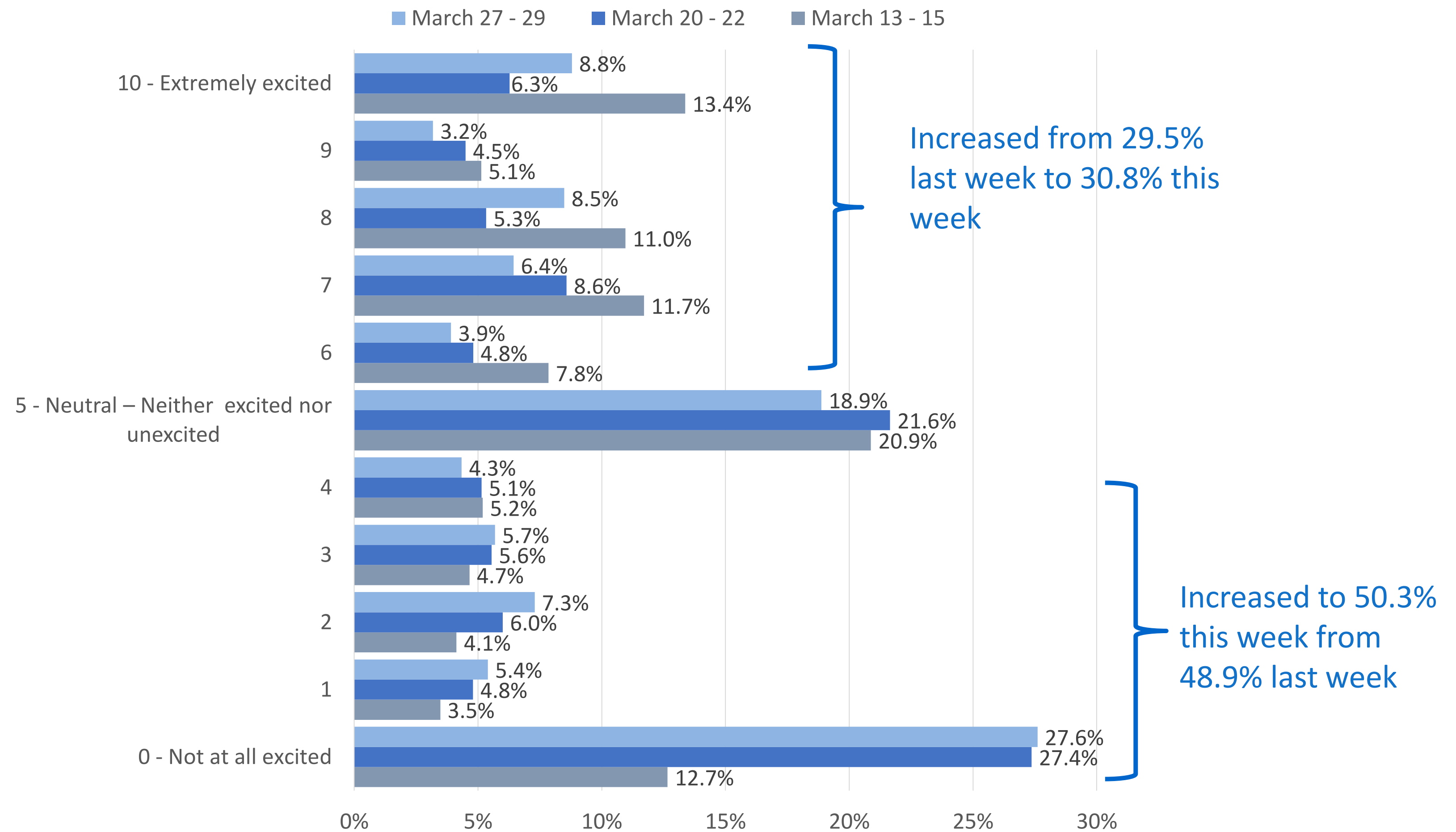
Excitement to Travel Now

Interest in even short trips is stable. Nearly 1-in-3 American travelers (30.8%) 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)

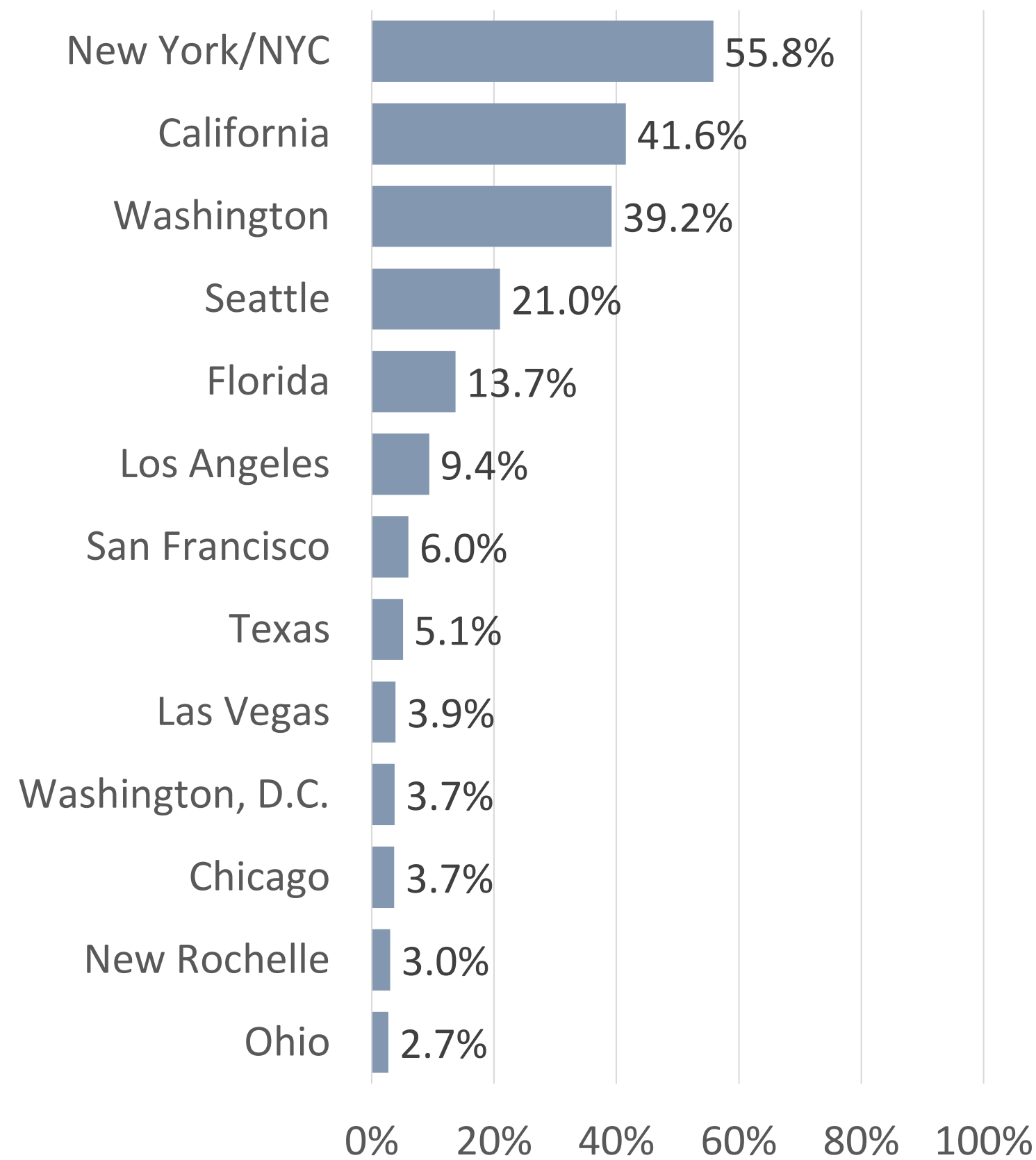
(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)



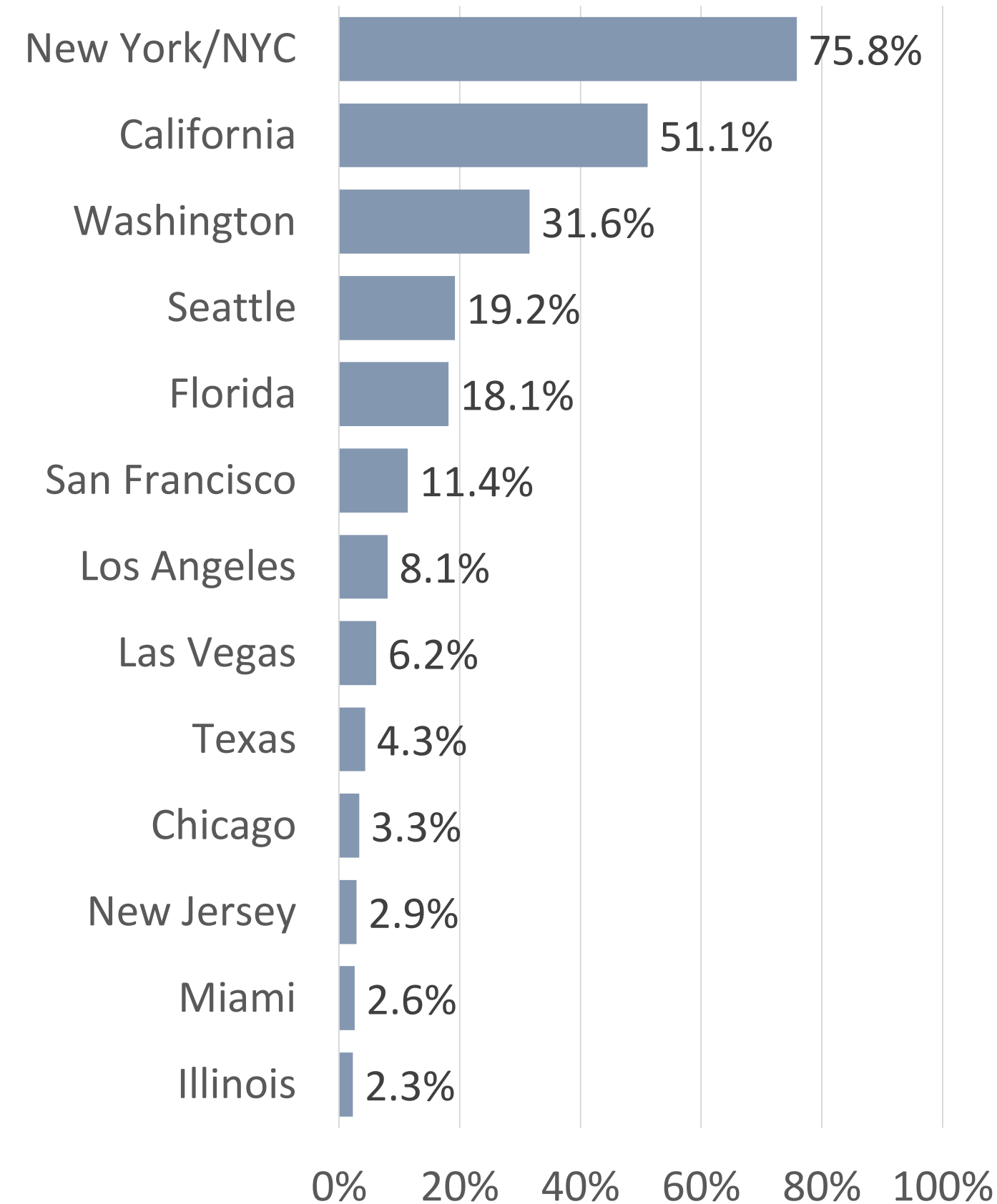
Most Talked About Coronavirus Hotspots

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

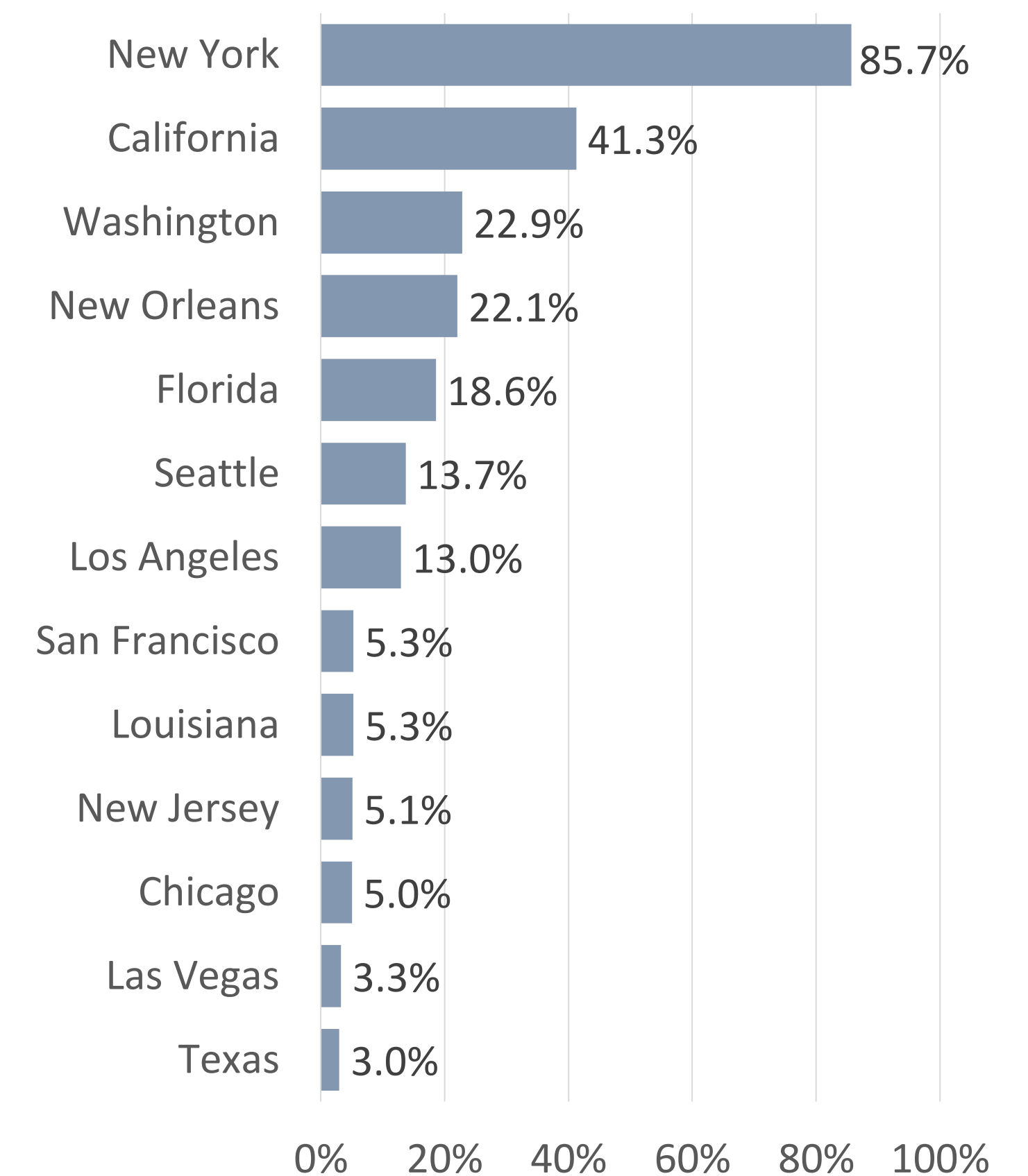
Wave 1 (March 15-17)



Wave 2 (March 20-22)



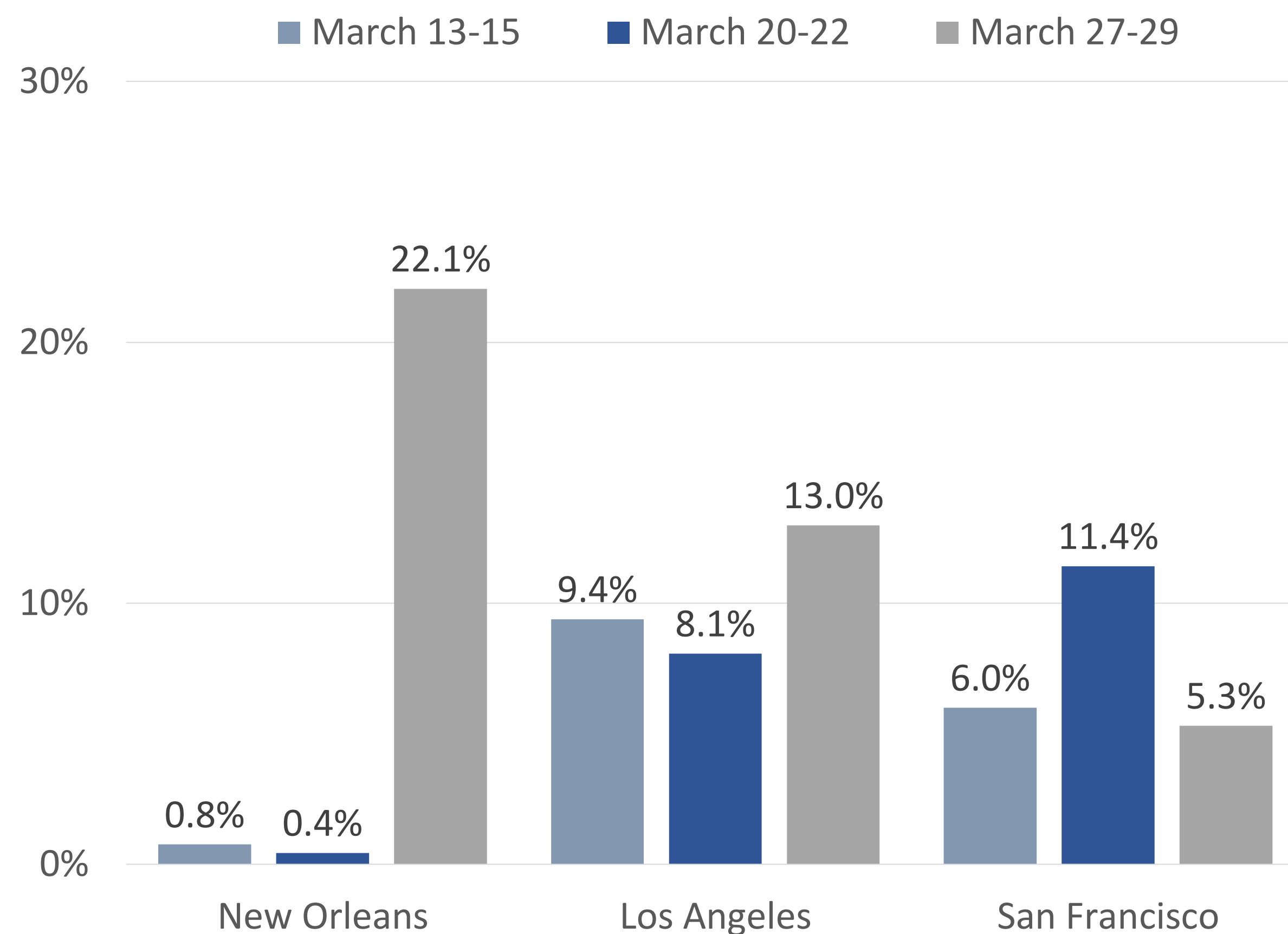
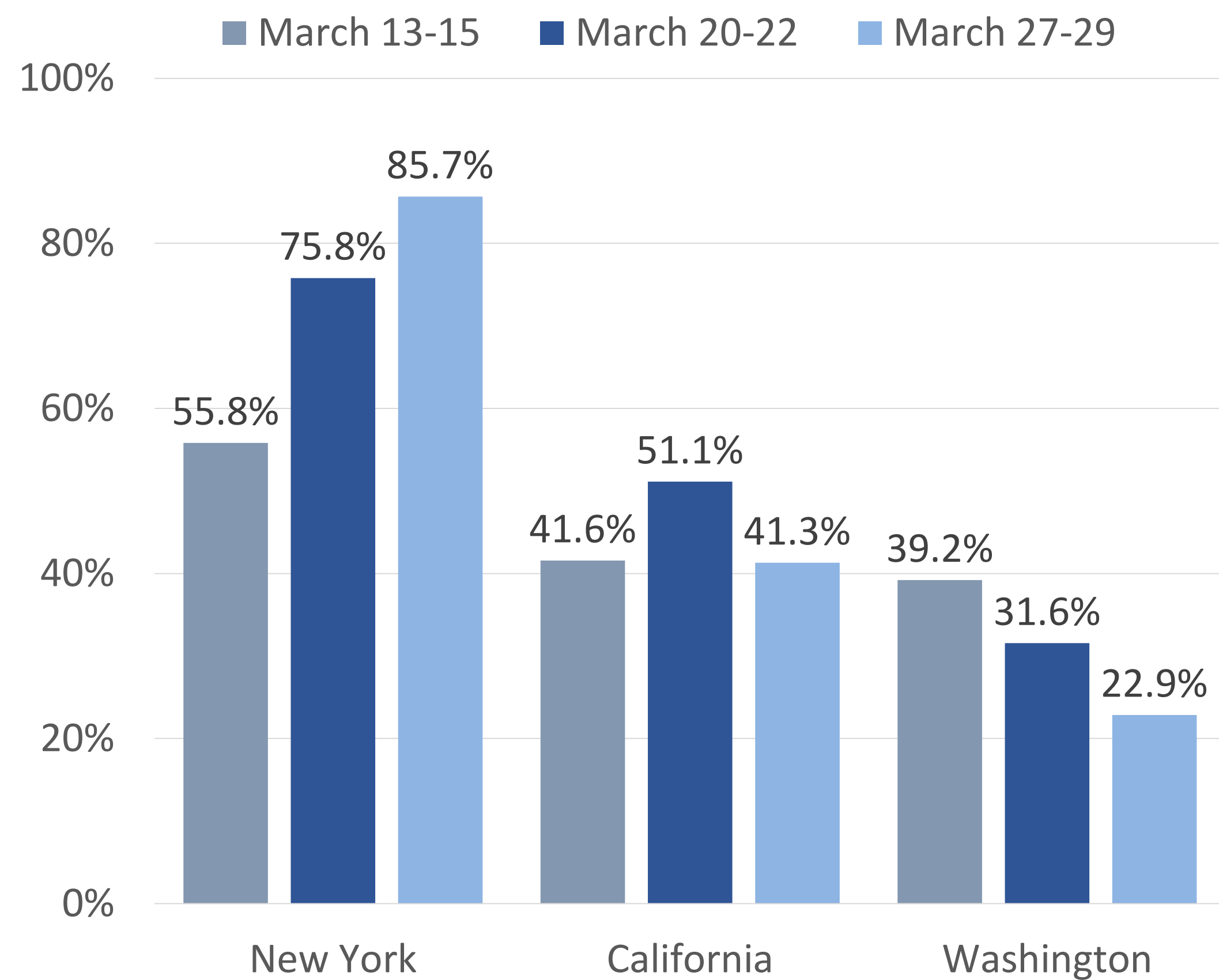
Wave 3 (March 27-29)



(Base: All respondents, 1,201, 1,200 and 1,201 completed surveys. Data collected March 13-16, 20-22, and 27-29, 2020)

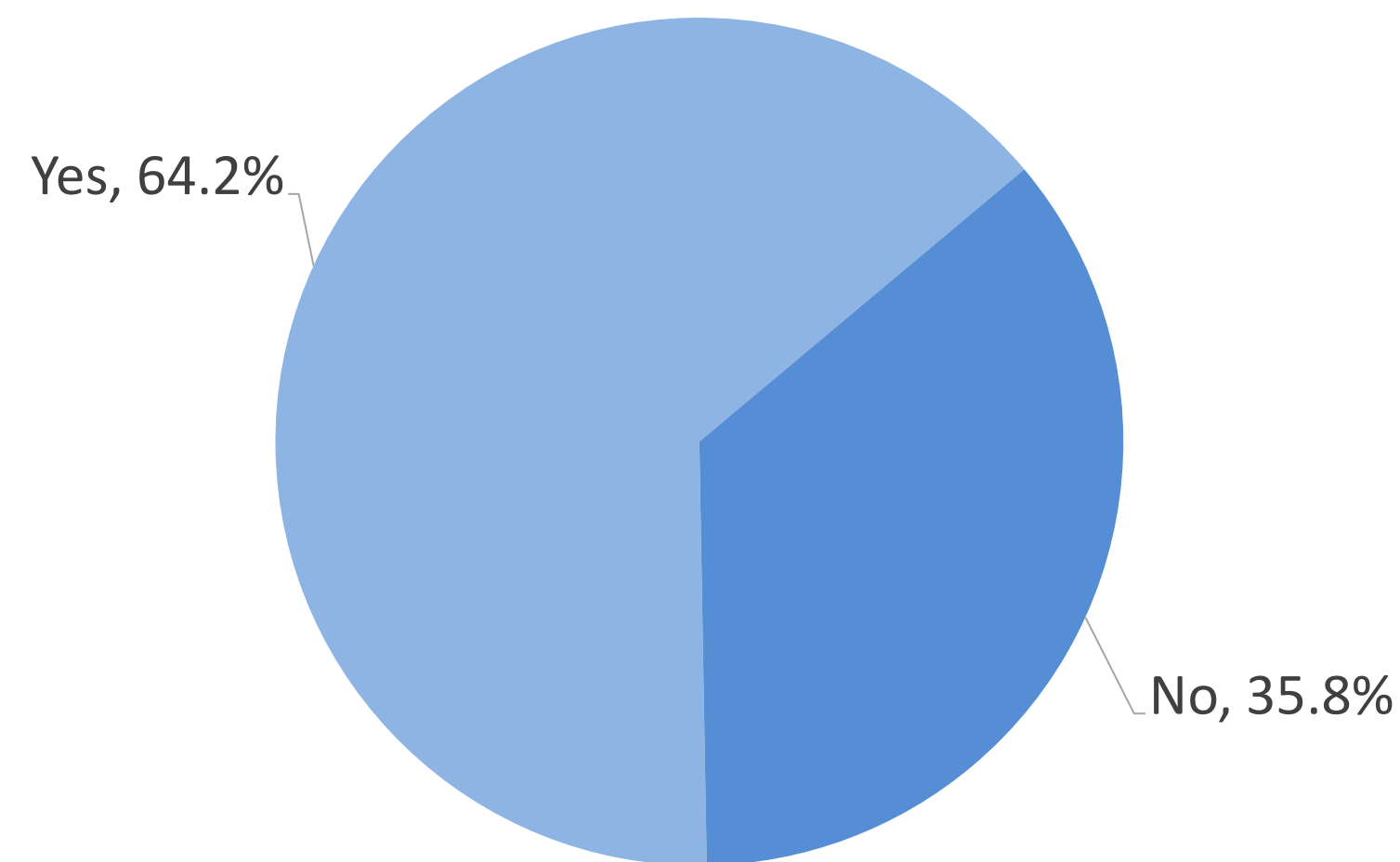
Most Talked About Coronavirus Hotspots

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

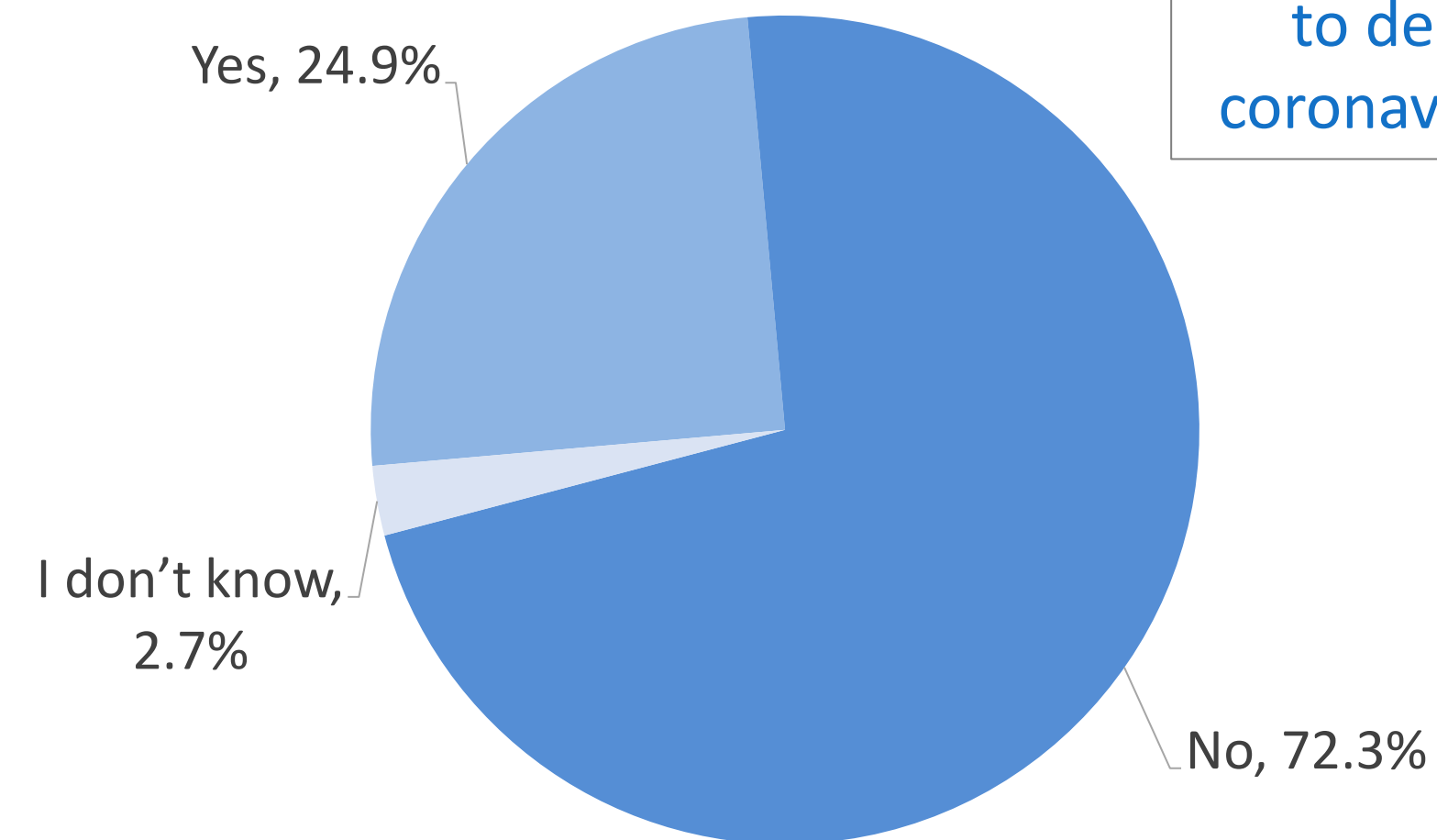


Vacation and PTO Usage to Deal with Crisis

Question: Does your employer offer you paid-time-off (PTO) or vacation time?



Question: Have you used any employer-provided paid-time-off or vacation time as a direct result of the recent coronavirus situation?



16.0% of American travelers have used vacation or PTO time to deal with the coronavirus situation

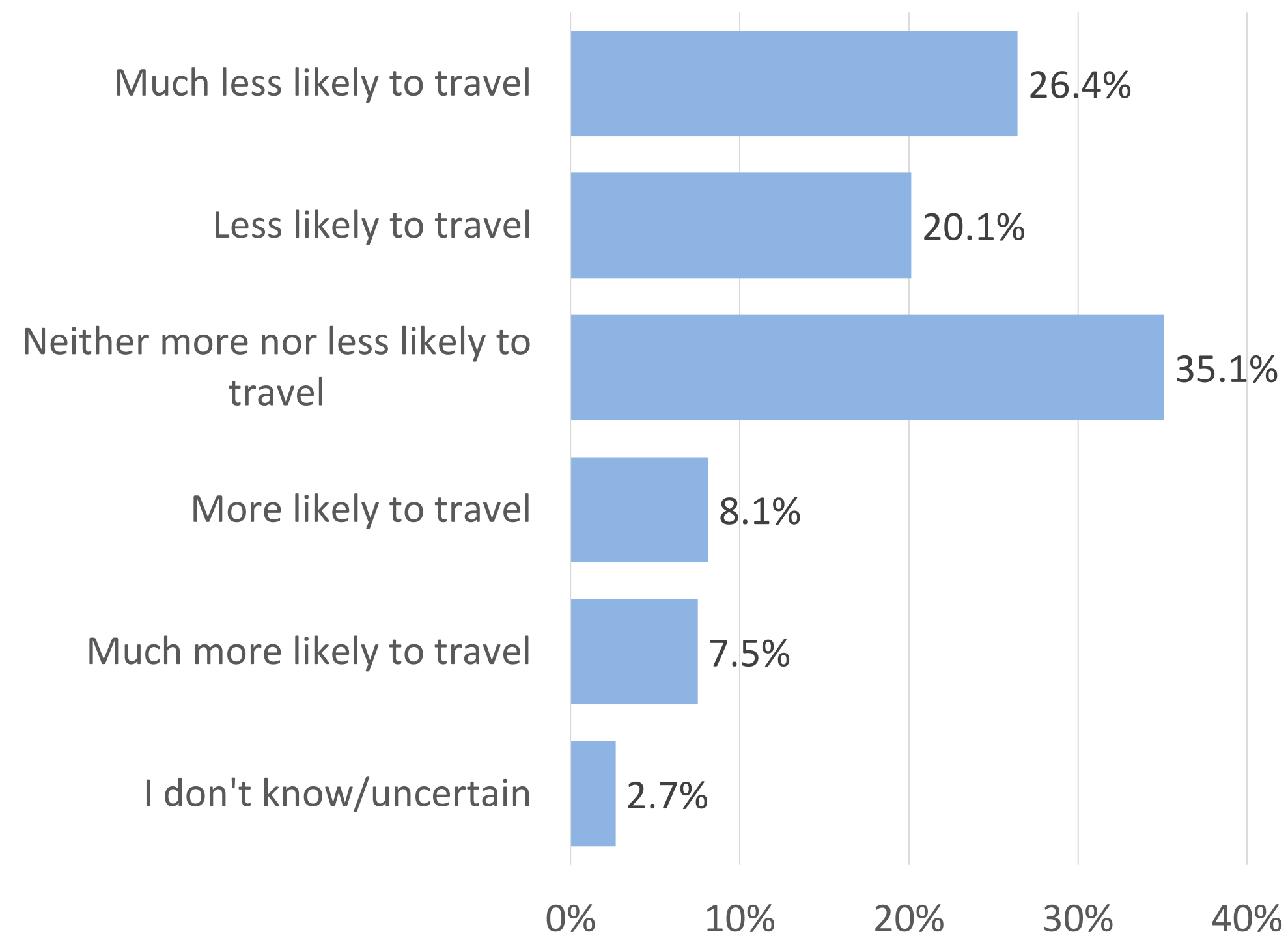
New Question Added in Wave 3

(Base: All employed respondents/respondents with paid vacation or PTO leave, 909/595 completed surveys. Data collected March 27-29, 2020)

Vacation and PTO Usage to Deal with Crisis

Question: Does having used this paid-time-off or vacation time effect how likely you are to travel in the NEXT SIX (6) MONTHS?

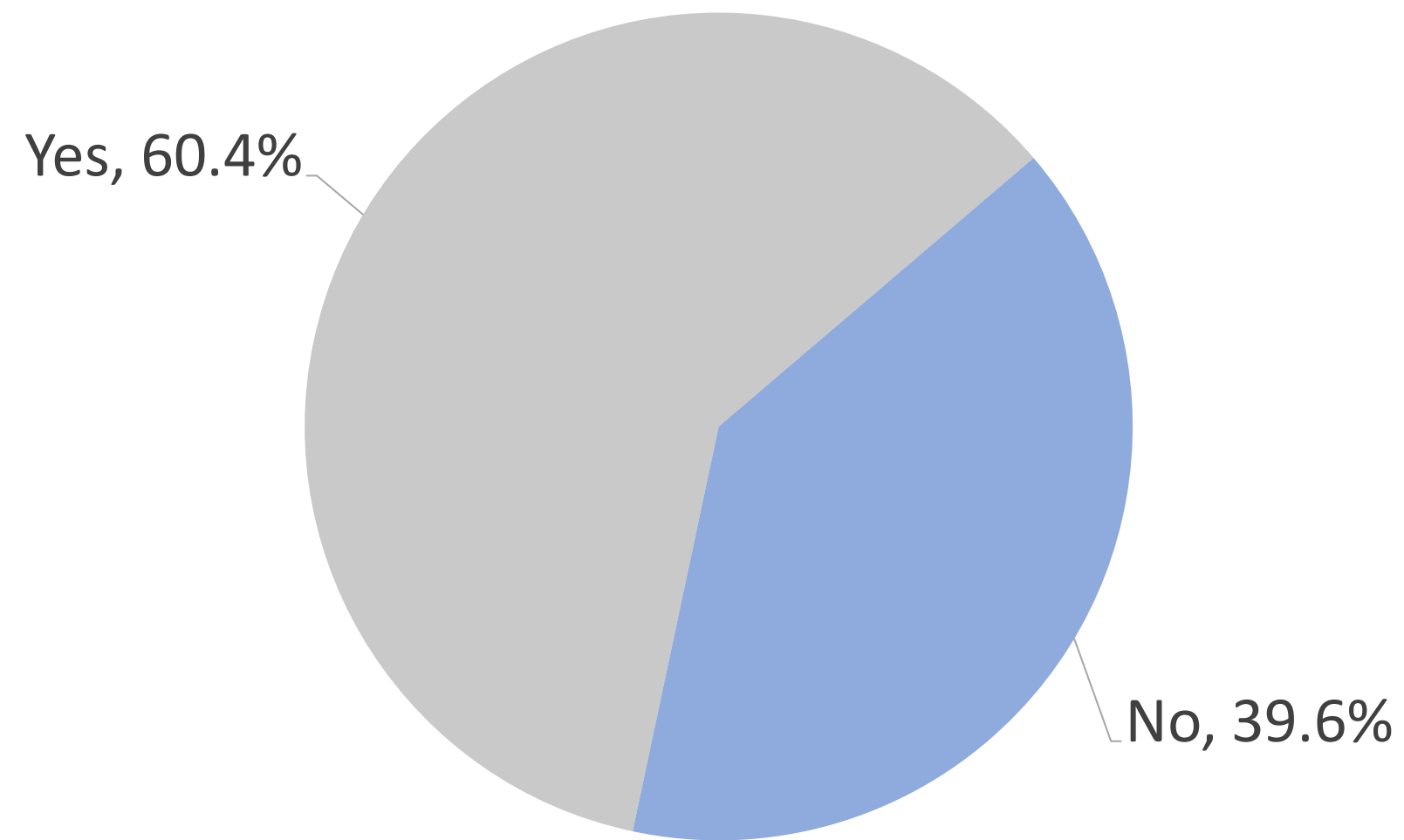
New Question Added in Wave 3



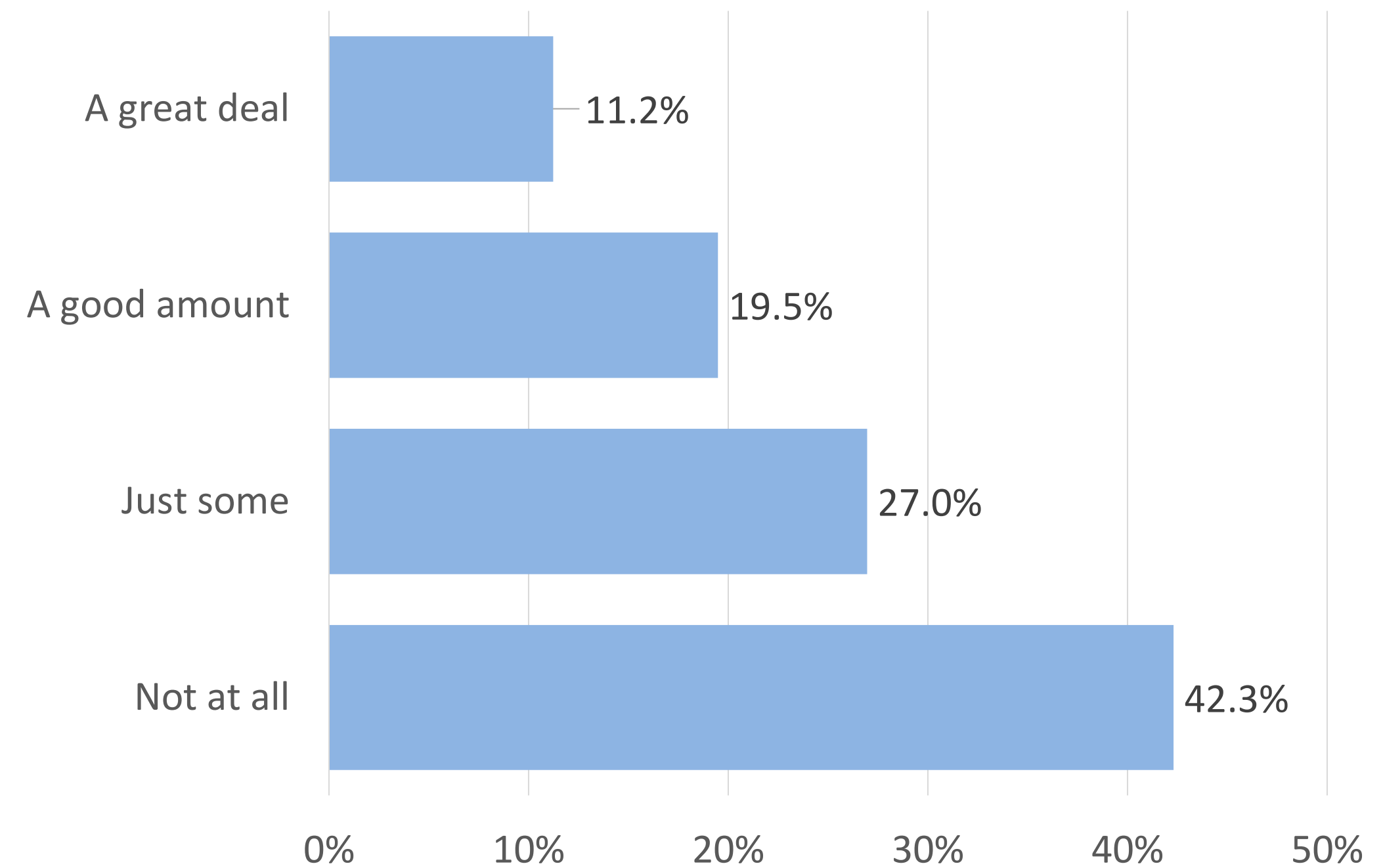
Nearly half of those who used vacation or PTO time to deal with the crisis say it will make them less likely to travel in the next six months (46.6%). As 16.0% of American travelers have used vacation or PTO time to deal with the coronavirus situation, this suggests that 7.5% of employed American travelers will be less likely to travel in the near future due to having used this vacation or PTO time.

Stock Market Volatility

Question: Thinking about all of your investments, including retirement savings at work, do you currently have money invested in stocks or mutual funds?



Question: How much do you rely on your stock or mutual fund investments as a source of income today?

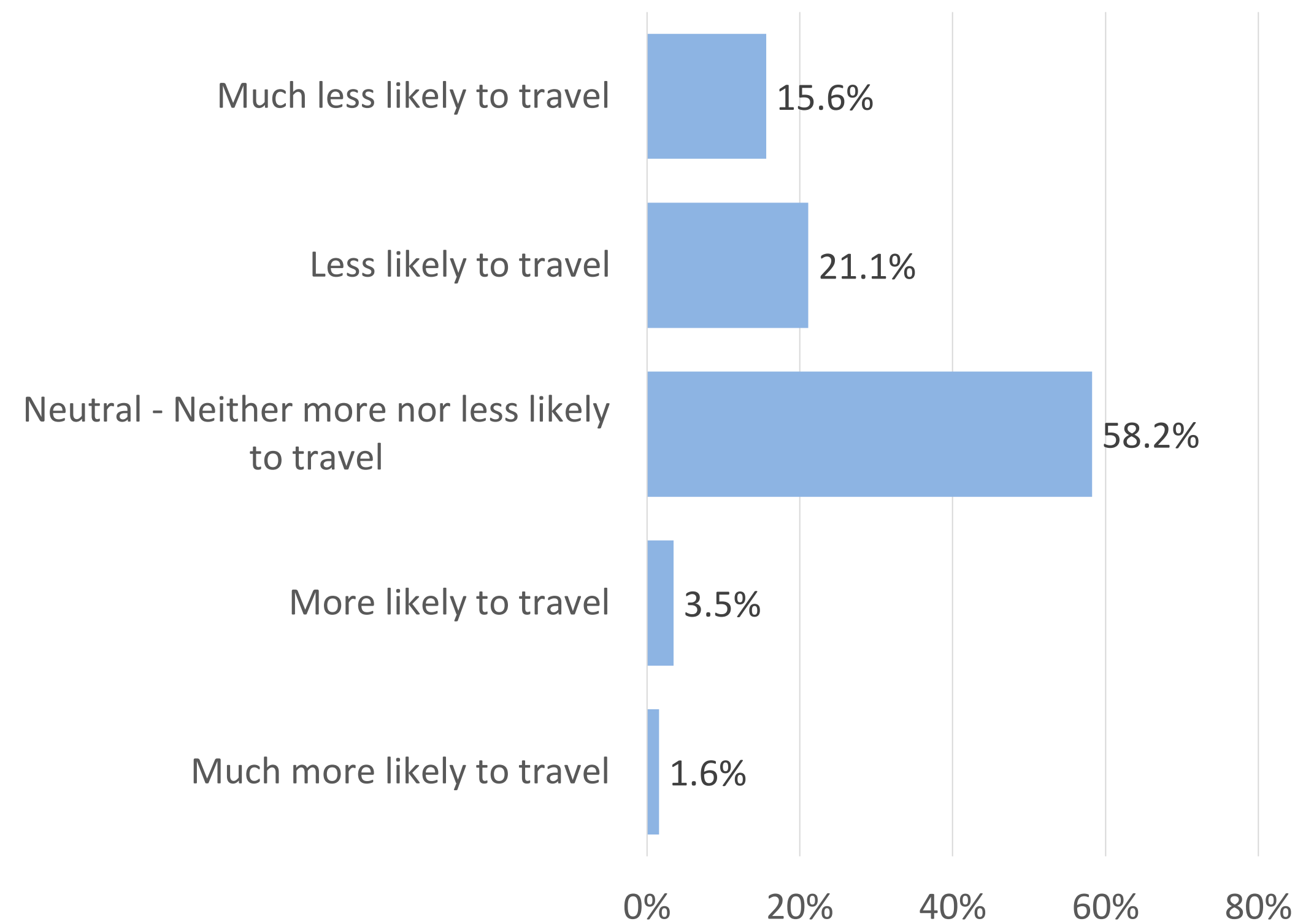


New Questions Added in Wave 3

Stock Market Volatility

Question: How have recent downward movements in the stock market (i.e., stock prices falling) impacted how likely you are to travel in the NEXT SIX (6) MONTHS?

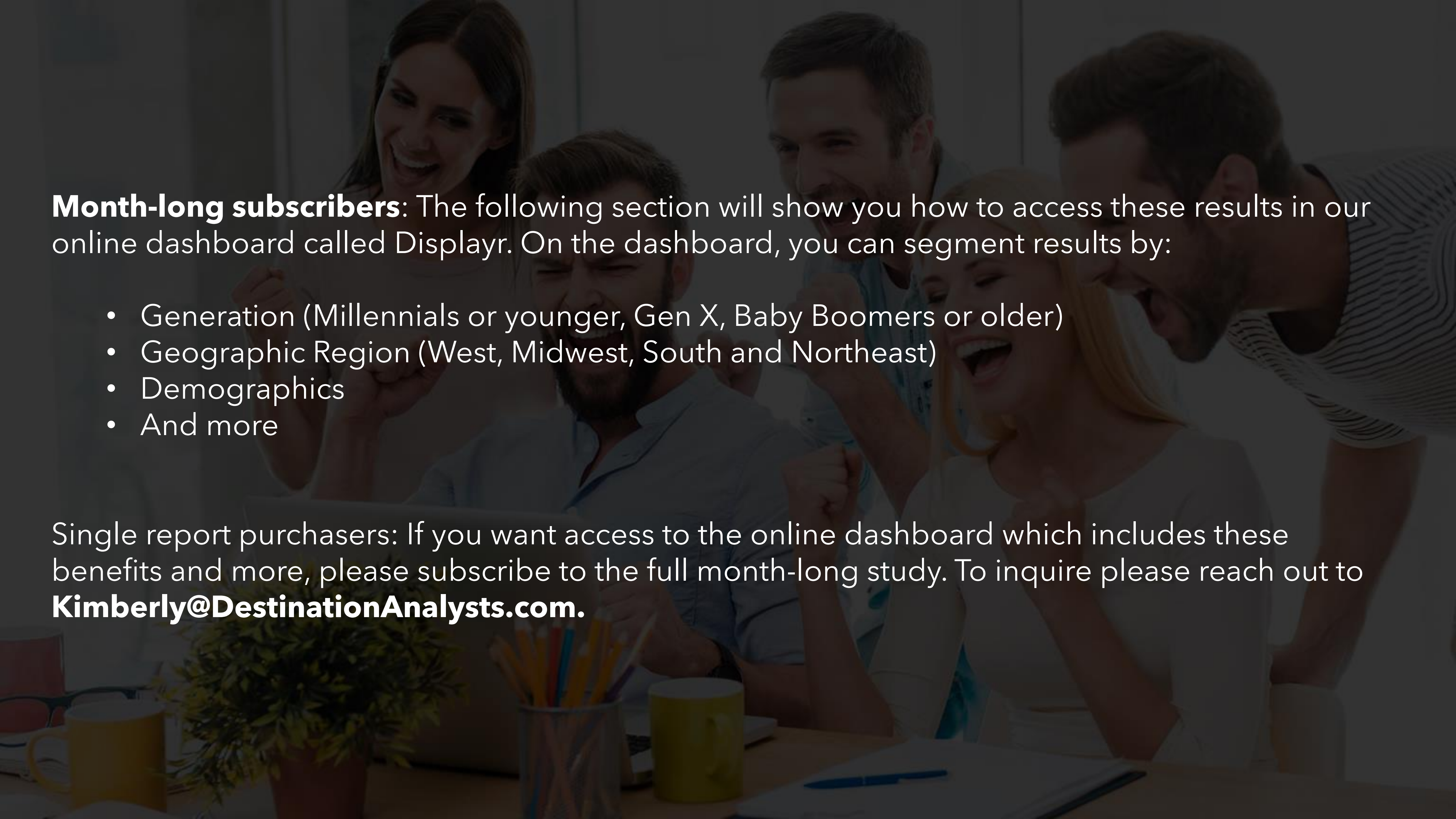
New Question Added in Wave 3



60.4% of American travelers have some investments in stocks or mutual funds. As 36.7 percent of these persons say the recent declines in stock prices will make them less likely to travel in the next six months, this implies that 1-in-5 travelers (22.2%) feel that this stock market volatility makes them less likely to travel in the upcoming months.



Data Tables



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

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

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

HOW TO USE DISPLYR

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



60%

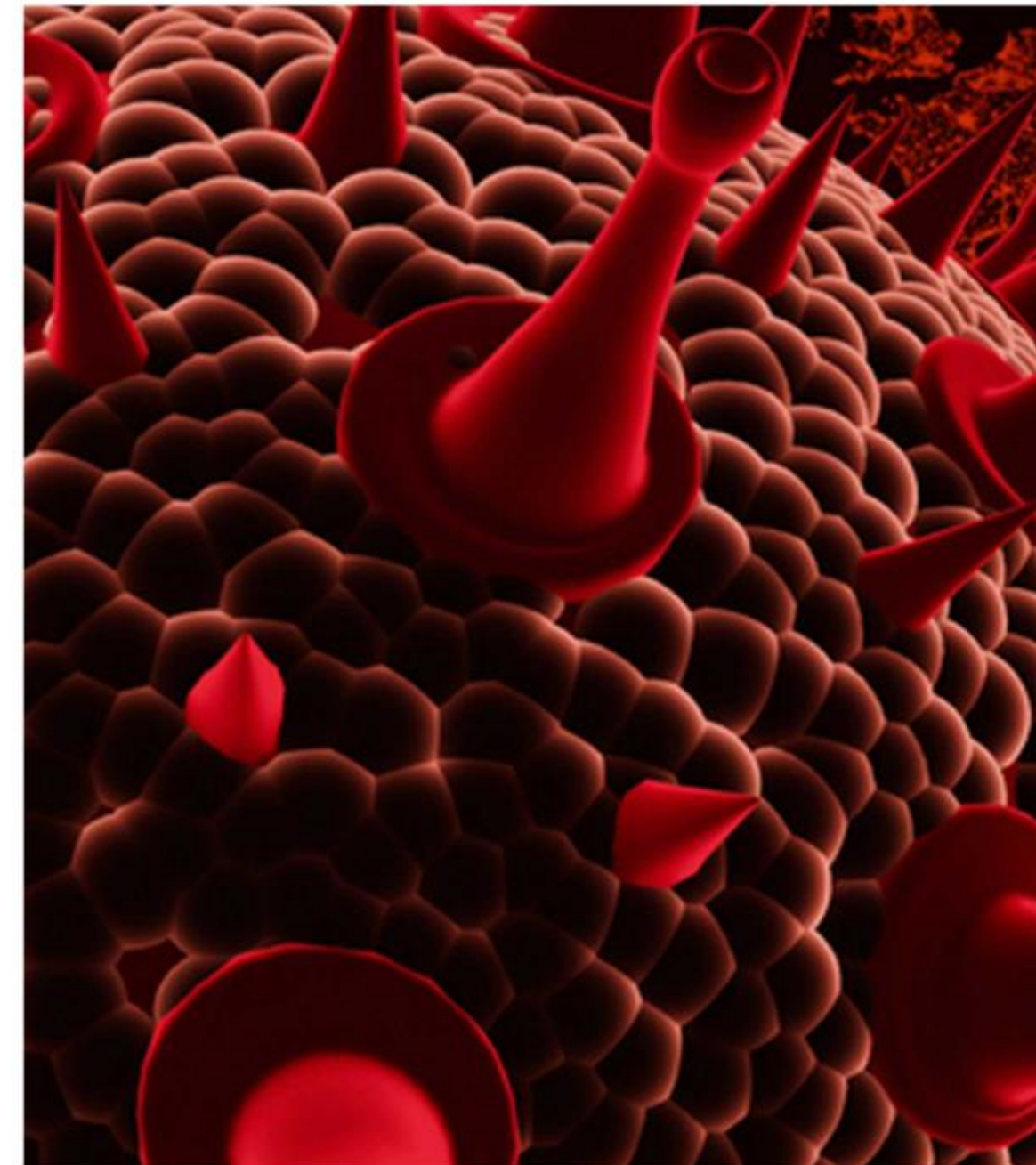
CTMX	0.45	▲	+0.45%
FTR	-0.23	▼	-2.34%
CSCO	-1.01	▼	-1.89%
CHK	0.02	▲	+0.21%
AAPL	+2.58	▲	+3.05%
PRTG	-0.14	▼	-1.42%
AMZN	-0.73	▼	-0.90%
TSLA	+1.08	▲	+5.12%
AVGO	-0.87	▼	-3.88%
SIRI	-0.65	▼	-1.37%

NAVIGATING THE DASHBOARD:

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

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



Search...

Filters ▾ Export ▾ ?

- 65% +

Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

NAVIGATING THE REPORT:

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

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

Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ? - + %

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



FILTERING THE REPORT:

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



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

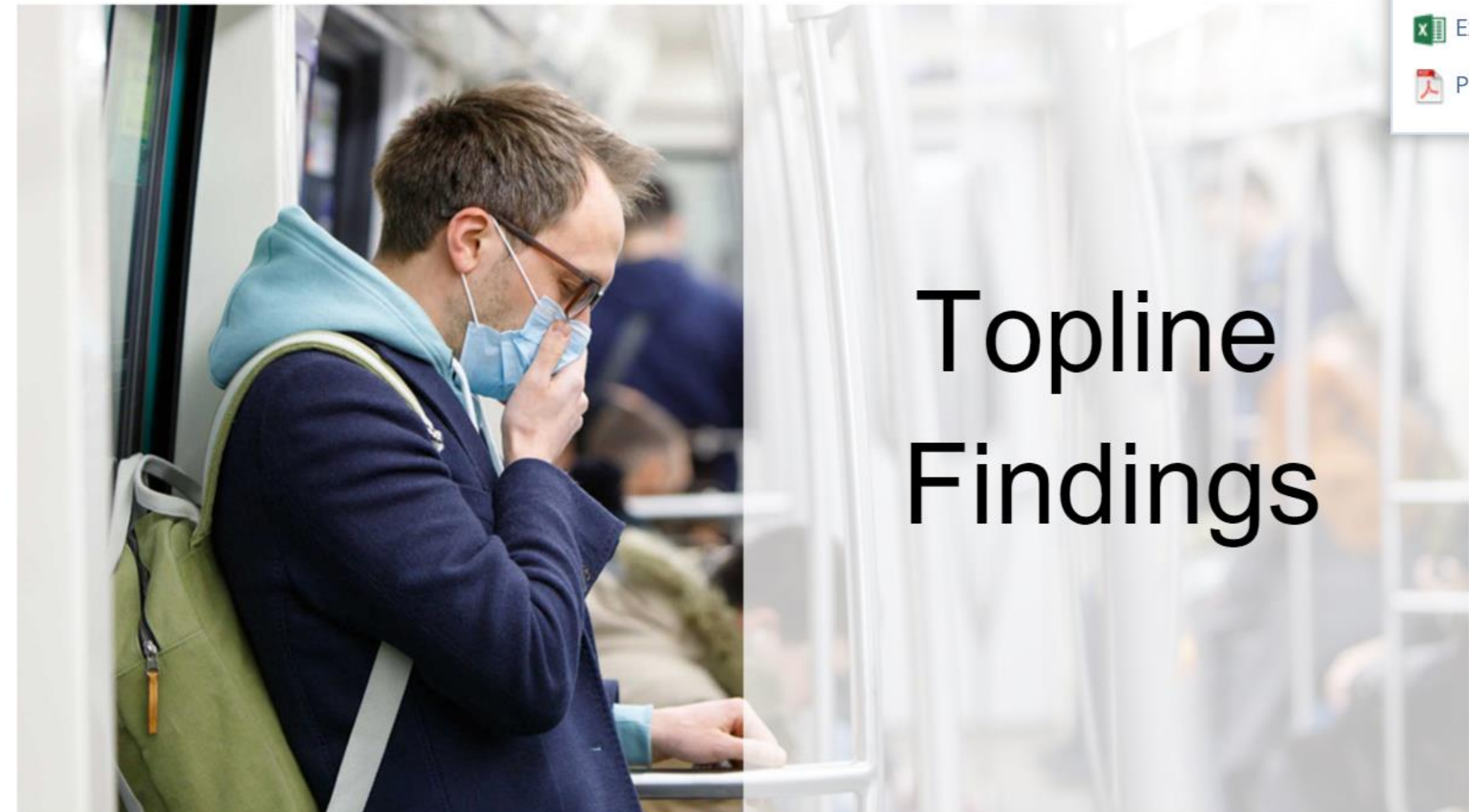
EXPORTING THE DATA:

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

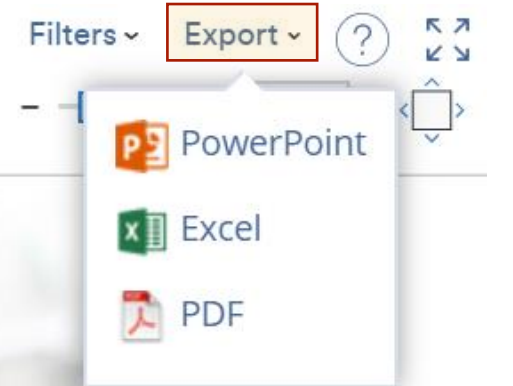
If you want to export a specific report section, be sure to select it in the navigation pane BEFORE you click "Export"

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
 - Concerned Personally
 - Concerned Personally - Breakout
 - Concerned for Friends/Family
 - Concerned for Friends/Family - 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

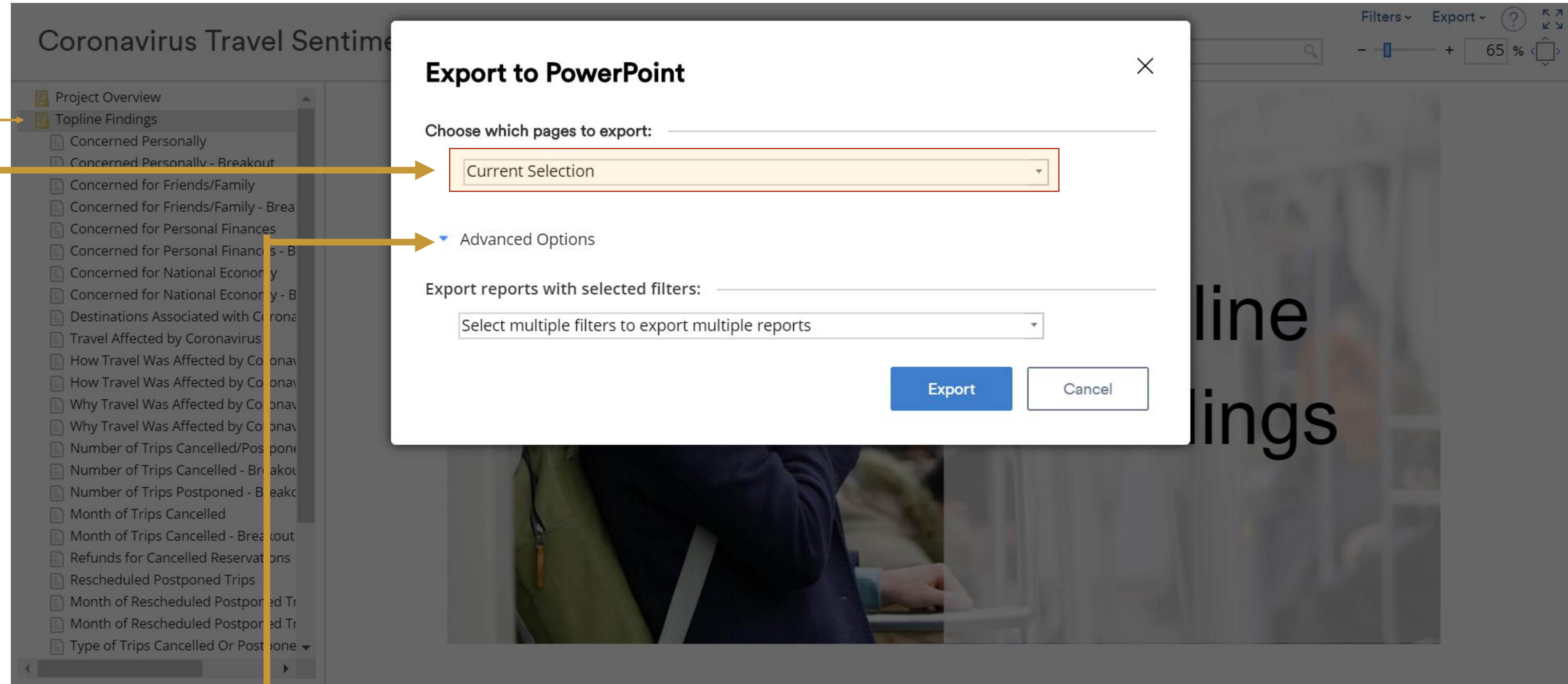


EXPORTING THE DATA:

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

Chingun@DestinationAnalysts.com

(415) 722-2503

