

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 4

RESEARCH FINDINGS

April 6, 2020

Destination  Analysts

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Project Overview

In order to benchmark and track the widespread disruption and damage to the travel and tourism industry caused by the coronavirus, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the fourth 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 fourth wave of this survey was collected from April 3-5, 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, 1,216 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



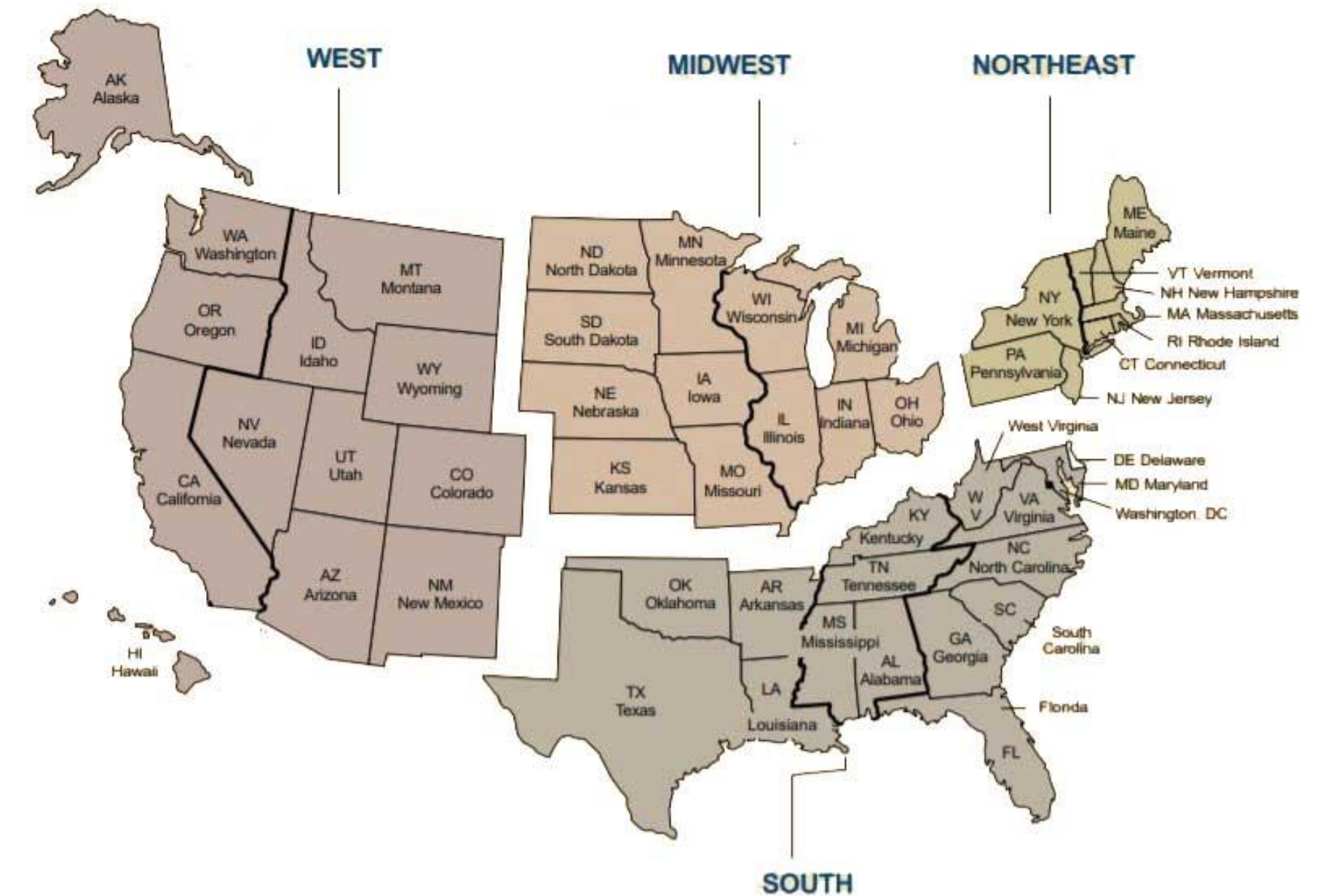
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Project Overview

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 into the foreseeable future. Weekly reports were, or will be, released on the following schedule.

Map of U.S. Showing Survey Regions



	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4

Key Findings

This fourth wave of this consumer sentiment project examines evolving traveler sentiment around the COVID-19 pandemic. The following key findings emerged:

- **Concern about personally contracting the coronavirus dipped very slightly this week.** In total, 74.4 percent of survey respondents now say they have some level of concern about contracting the virus, down from 75.6 percent last week. Americans continue to be more concerned about the health of their friends and family than themselves, with 83.4 percent expressing concern for the safety of their loved ones, up slightly from 81.8 percent last week.
- **Economic concerns increased slightly this week.** Most American travelers are concerned that the pandemic will impact their personal finances (71.1%). This is up slightly from 68.3 percent last week. National economic anxiety also deepened this week. Nearly 90 percent of travelers expressed some level of concern for the national economy.



Key Findings



- **Cruise and international travel continue to be seen as the least safe travel activities, but they are not the only travel activities widely deemed as dangerous.** Attending a convention or conference is considered to be “Somewhat unsafe” by 18.4 percent and “Very unsafe” by 65.1 percent of travelers. Overall, the perceived safety of various travel activities appears to have stabilized this week. Previous weeks had seen growth across the board in the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe.”
- **Traveler excitement to get back out on the road increased this week,** as nearly 70 percent of American travelers agree that they miss traveling and can’t wait to get out and travel again.
- **In the fourth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus increased to 72.8 percent.** This week, 65.3 percent of travelers said they had cancelled a trip, compared to 59.7 percent last week. Postponements were down slightly to 48.5 percent this week, from 53.0 percent last week. Concerns about personal safety again topped the reasons expressed for why Americans have changed their travels, with two-thirds of respondents citing it as a reason (65.8%).

Key Findings

- **Cancellations.** 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. A majority of travel cancellations appear to be near-term bookings. In this survey wave, there are continued increases in the cancellation of June and July trips. Growth in the proportion of travelers being fully refunded for cancelled trips has slowed. This week, 64.9 percent report receiving full refunds, compared to 63.7 percent last week.
- **Postponements.** Approximately three-quarters of postponed trips (75.3%) are not currently being rescheduled. Postponement windows may be lengthening after an initial period of optimism. This week saw jumps in the proportion of travelers rescheduling trips who said they would take that trip in September. Postponements of vacations and trips to visit friends and relatives decreased after increasing last week. Urban areas are still the most postponed destination type. Over the course of the month, this figure has declined to 32.5 percent. Almost one-third (32.1%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure has remained stable for the past 3 waves.



Key Findings



- **Darkening horizons.** This week, more travelers feel the situation will get worse in the next month. 7-in-10 travelers (71.3%) expect the coronavirus situation to get worse in the next month, up from 66.5 percent last week. 81.9 percent of travelers say they are done traveling until the situation blows over. More than half (53.3%) strongly agree with this sentiment.
- **Are we losing the summer travel season?** Last week 4-in-10 (39.3%) American travelers saw the coronavirus situation resolving itself before summer. Agreement with this statement is down this week to just 3-in-10 (31.0%). About one-half of American travelers (53.1%) expect to be back traveling this Fall. Only 16.4 percent disagree. Over the course of the month, there has been increasing agreement that staycations may end up replacing vacations this summer. The percent of American travelers agreeing with this sentiment has grown from 41.3 percent in wave 1 to 52.8 percent in the most recent wave.
- **Car travel may displace some air travel this year, with 4-in-10 American travelers saying they may avoid airlines and instead travel by car.** This metric changed very little from last week. Similarly, 47.2 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 four waves of this project.

Key Findings

- **Trust that attending meetings in the current environment is safe is still very low.** Nearly 8-in-10 travelers (77.1%) now say they will be unlikely to attend these events until the coronavirus situation is over.
- **Unchanged from last week, 4-in-5 American travelers (81.9%) said they're unlikely to travel outside the U.S. until the coronavirus situation is resolved.**
- **American travelers' comfort in going out in their own communities to enjoy themselves is nearly gone.** This week, less than 1-in-5 (19.7%) Americans said they felt comfortable doing this.
- **8-in-10 American travelers now report living in a community with known cases of the virus.**
- **Price cuts resonate with approximately 1-in-3 American travelers.** When asked if price cutting made traveling in the next three months more interesting, 33.7 percent now agree, virtually unchanged from last week (32.4%).



Key Findings



- **Travel shaming.** Half of Americans (53.7%) feel that persons traveling now should be ashamed of this behavior. Only 15.0 percent disagree.
- **Shopping locally.** 6-in-10 American travelers (60.6%) say they have been taking action to try to support local businesses where they live.
- **Business restrictions.** Well over half of employed American travelers (55.0%) say their employer has put travel restrictions into effect, up from last week. Nearly 4-in-10 employed American travelers with employer-mandated travel restrictions (39.5%) say they will remain in place for at least one month.
- **Are we in for a Fall turnaround?** While the scheduling of leisure trips in the next three months has fallen, there does appear to be some increases on the horizon for the Fall months.
- **It's clearly not time to advertise yet.** Travelers' interest in learning about new travel experiences and destinations has remained steady. This week, 4-in-10 (40.7%) expressed low levels of excitement about the topic.

Key Findings

- **Interest in even short trips continues to decline.** About a third of American travelers (32.7%) 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—up from 27.6 percent last week.
- **The short-term impact on destination brands.** Long-term damage to a destination's brand caused by negative coronavirus publicity will be difficult to measure. At the moment, however, it appears those destinations struggling the most with the virus may have a steeper hill to climb in the immediate aftermath of the crisis. Several destinations with lesser levels of media attention were also tested, and the percent loss in interest in visiting in the immediate post-crisis period was markedly less.
- **After the crisis, will travel behaviors change?** Less than one-third of American travelers say they expect to change the types of travel destinations they choose to visit after the coronavirus situation blows over. However, when asked specific travel behaviors they will likely avoid after the crisis is over, more than half said they would avoid cruises (55.1%), and nearly half (49.8%) said they would avoid crowded destinations.





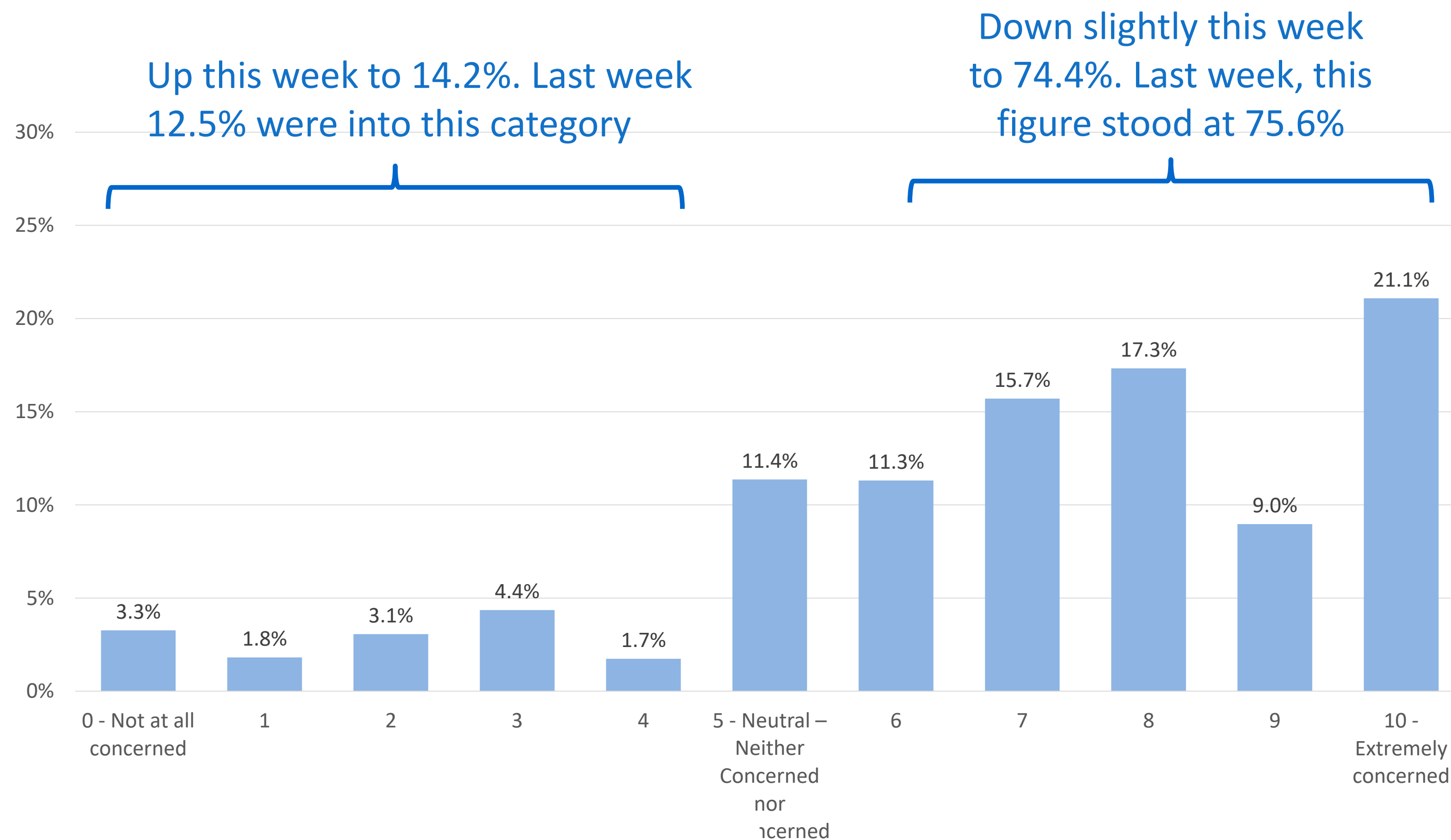
Section I:
Current Feelings
About Travel

Personal Health Concerns

Traveler concern about contracting the coronavirus dipped very slightly this week. In total, 74.4 percent of survey respondents now say they have some level of concern about contracting the virus, down from 75.6 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 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

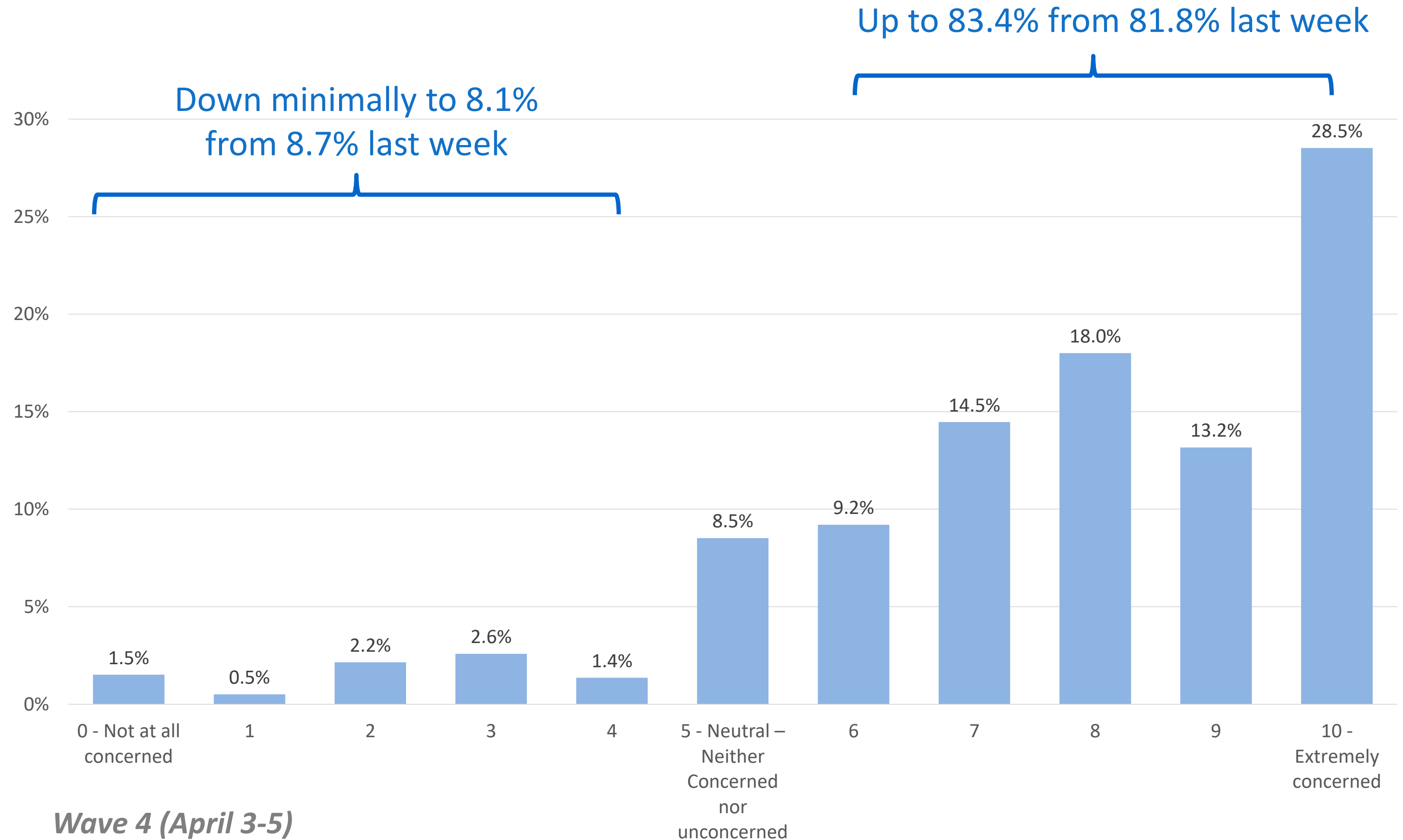


Wave 4 (April 3-5)

Health Concerns (Family & Friends)

Travelers continue to be more concerned about the health of their friends and family than themselves, with 83.4 percent expressing concern for the safety of their loved ones, up slightly from 81.8 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 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

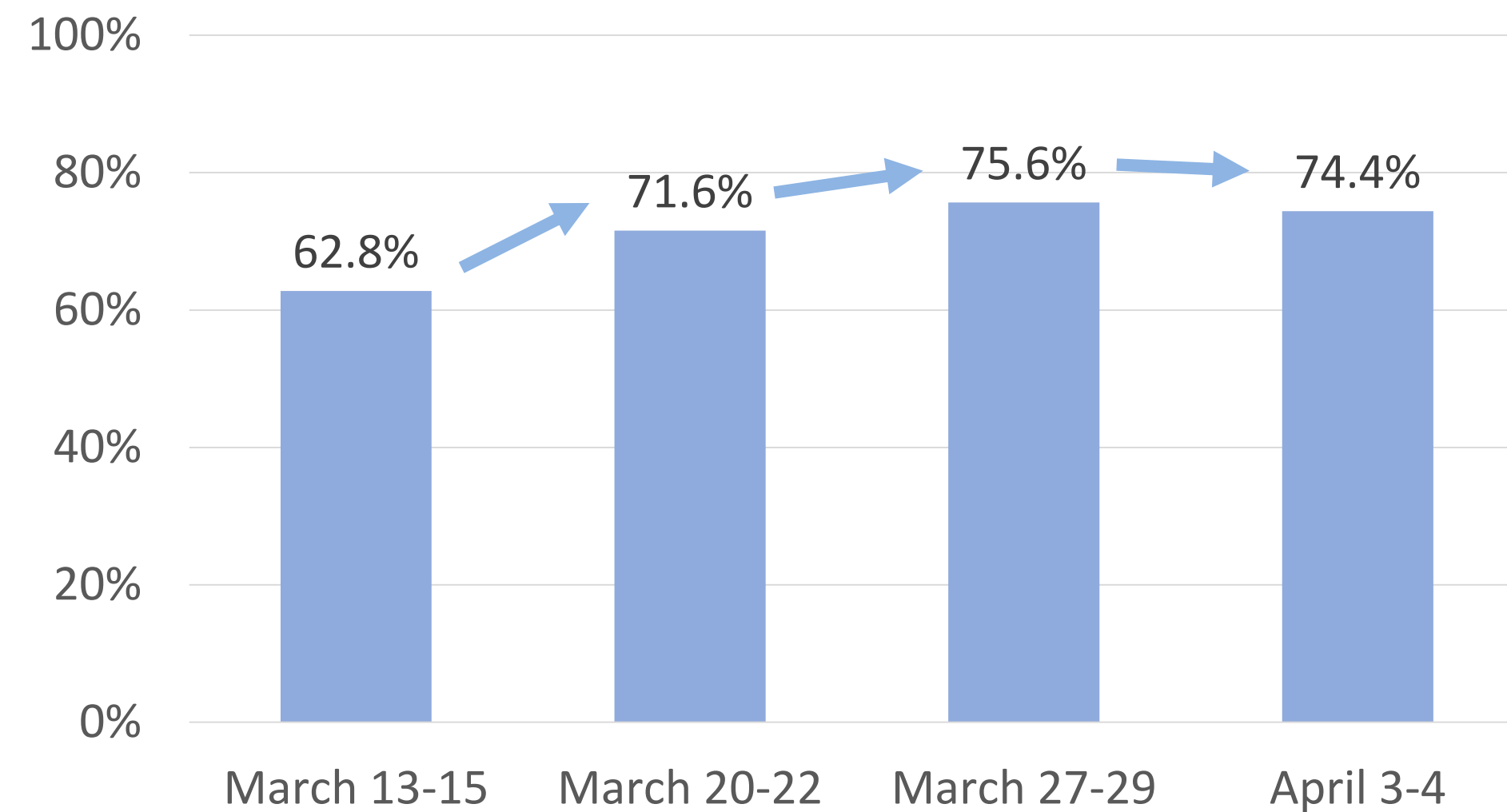
Wave 4 (April 3-5)

Summary: Safety Concern Metrics

Summary charts for the safety concern metrics are shown below.

Concern About Contracting Virus (Personally)

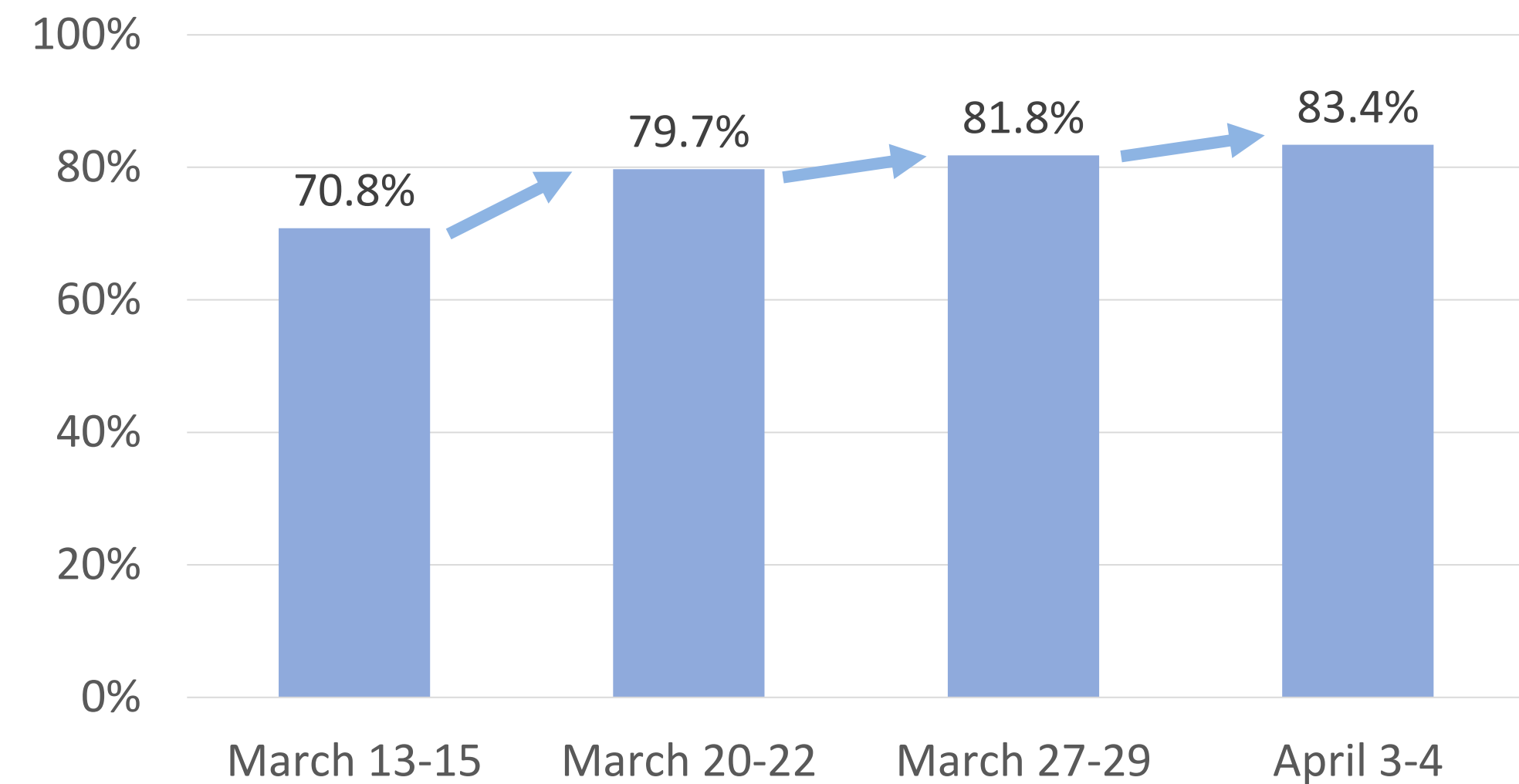
(% answering 6-10 on 11-point scale)



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

Concern About Loved Ones Contracting Virus

(% answering 6-10 on 11-point scale)



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

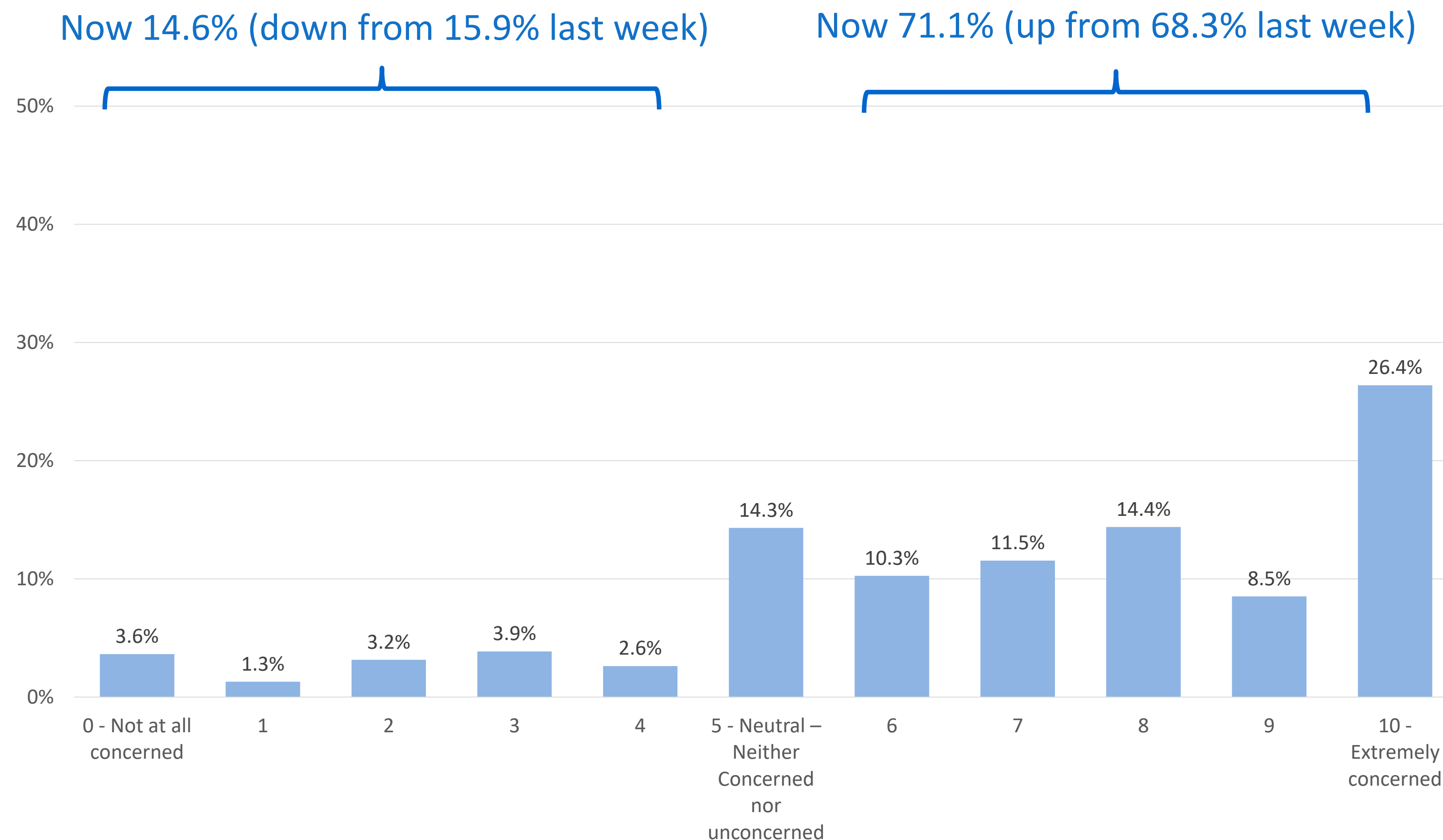
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

Concerns About Personal Finances

Most American travelers are concerned that the pandemic will impact their personal finances (71.1%). This is up slightly from 68.3 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 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



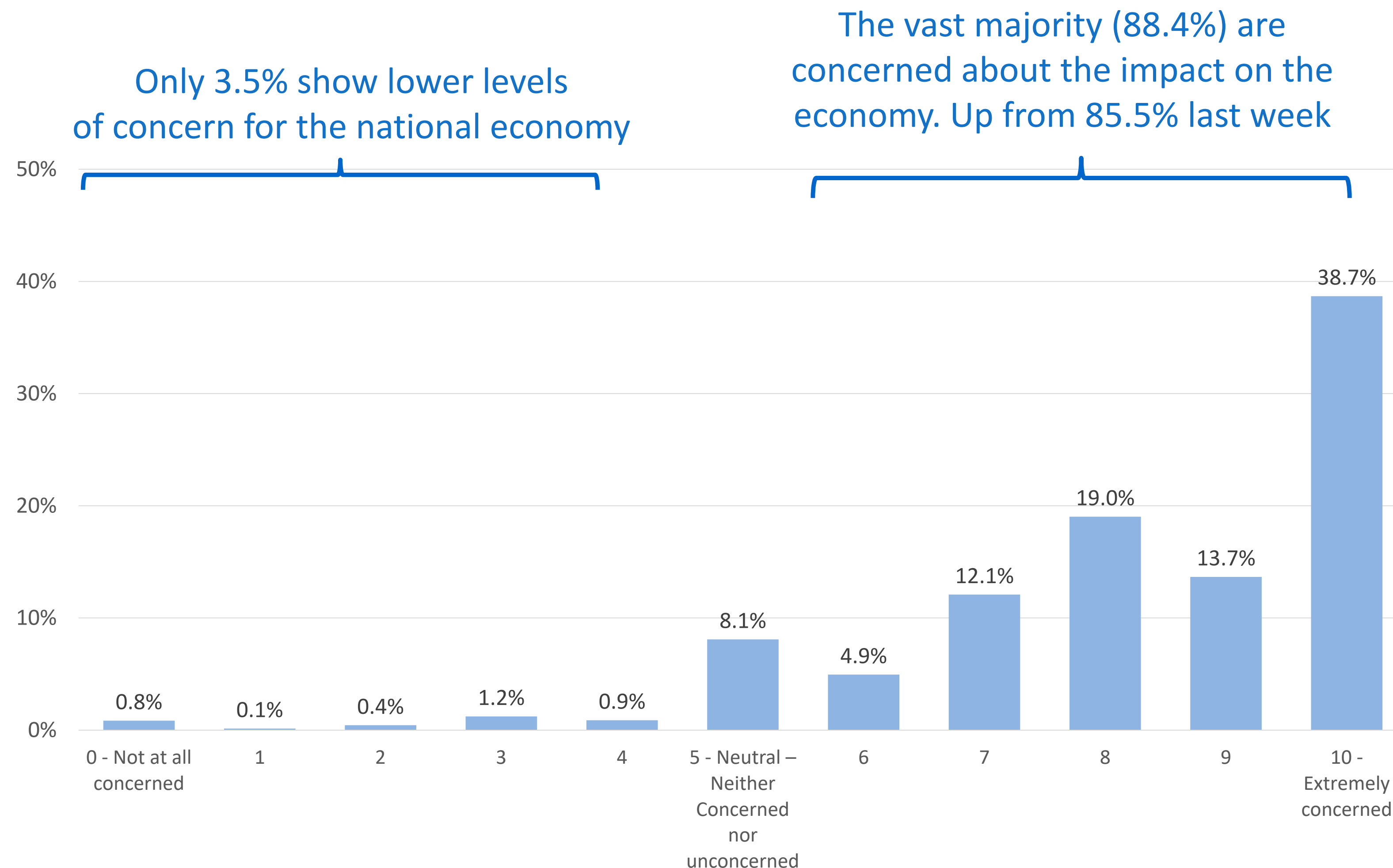
Wave 4 (April 3-5)

Concerns About National Economy

National economic concerns deepened this week. Nearly 90 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 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



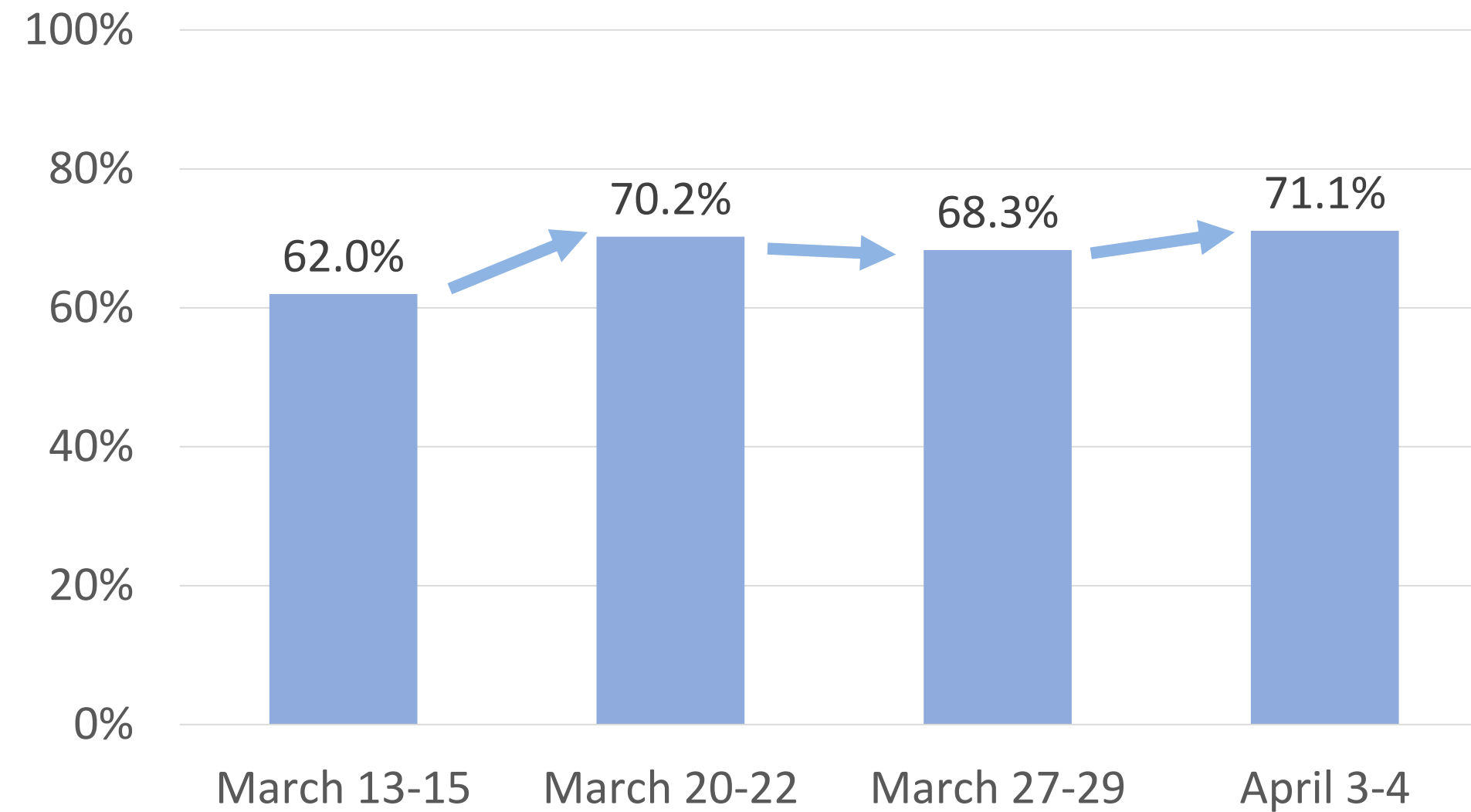
Wave 4 (April 3-5)

Summary: Economic Concern Metrics

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

Personal Finances

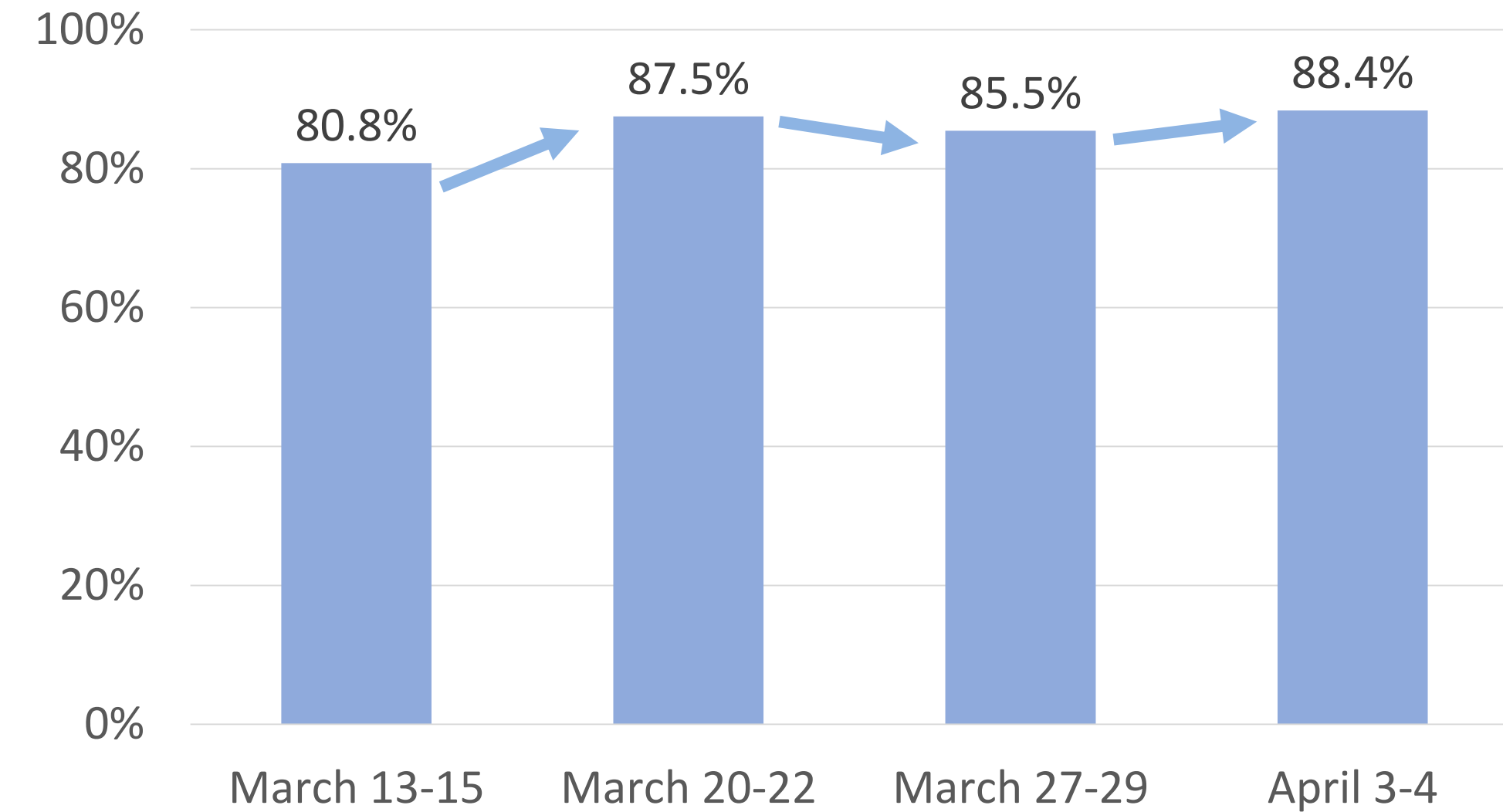
(% answering 10-6 on 11-point scale)



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

National Economy

(% answering 10-6 on 11-point scale)



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

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

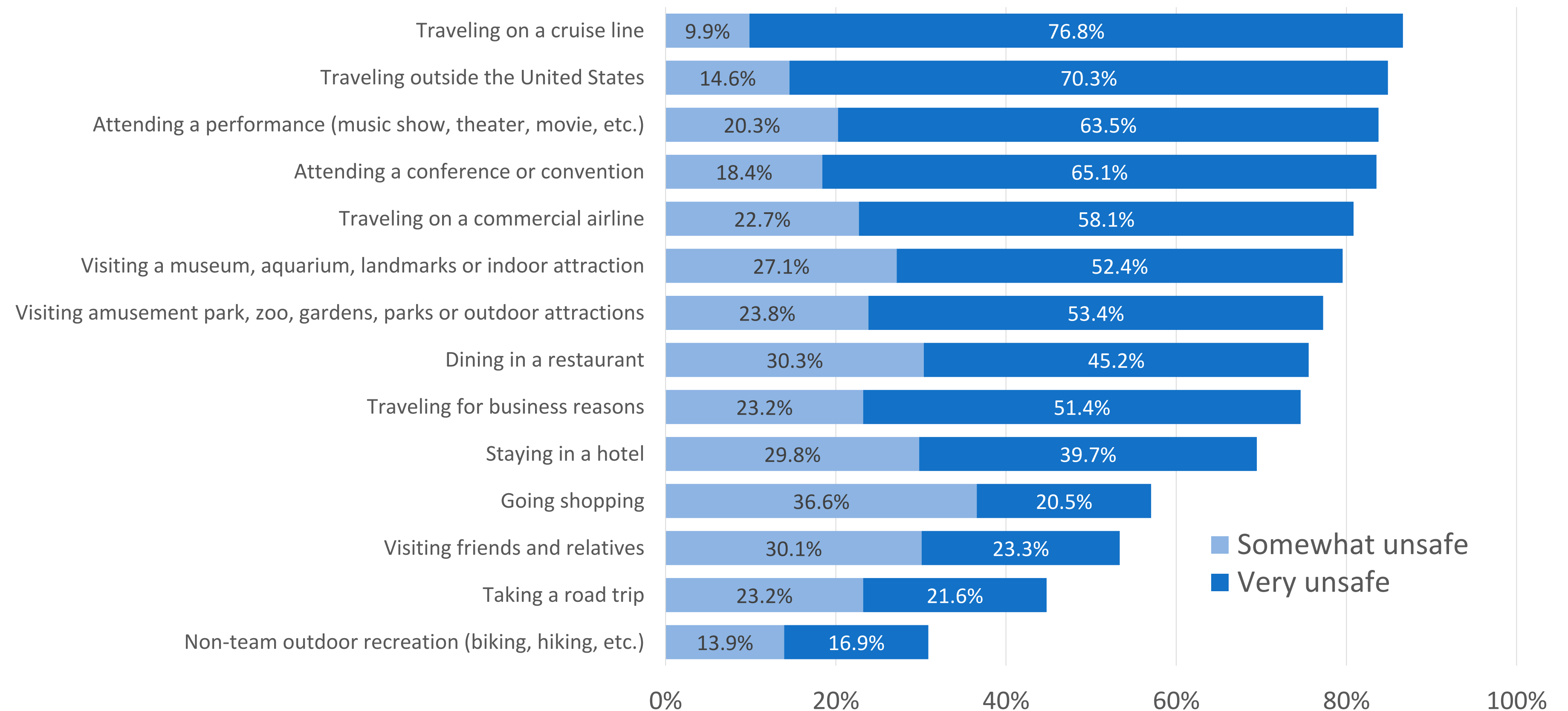
Perceived Safety of Travel Activities (Wave 4)

Cruise and international travel continue to be seen as the least safe travel activities. Attending a convention or conference is considered to be “Somewhat unsafe” by 18.4 percent and “Very unsafe” by 65.1 percent of travelers.

Wave 4 (Collected April 3-5)

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

(Base: All respondents, 1,201 completed surveys. Data collected April 3-5, 2020)

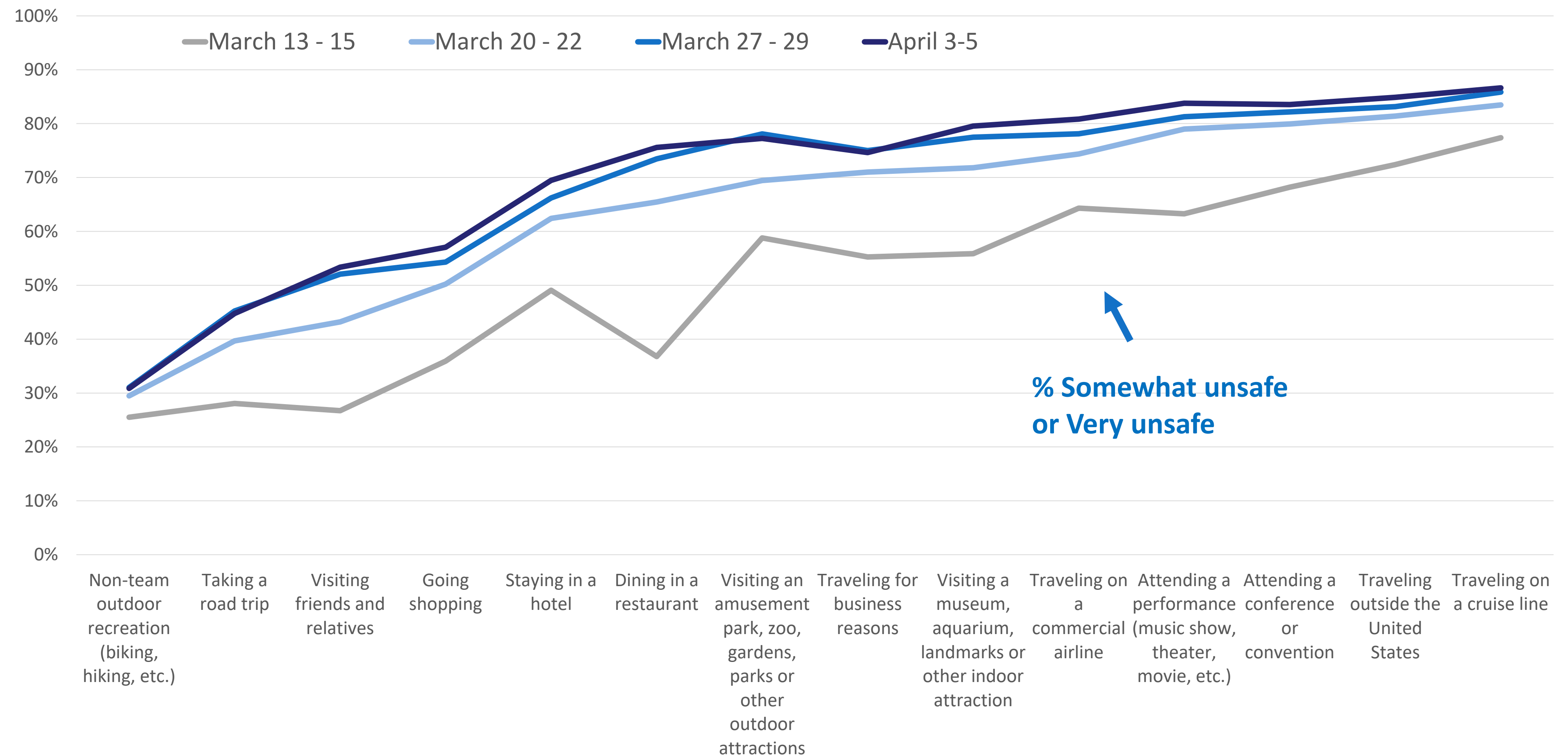


Perceived Safety of Travel Activities (Waves 1-4 Comparison)

The perceived safety of various travel activities appears to have stabilized this week. Previous weeks had seen growth across the board in the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe.”

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

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

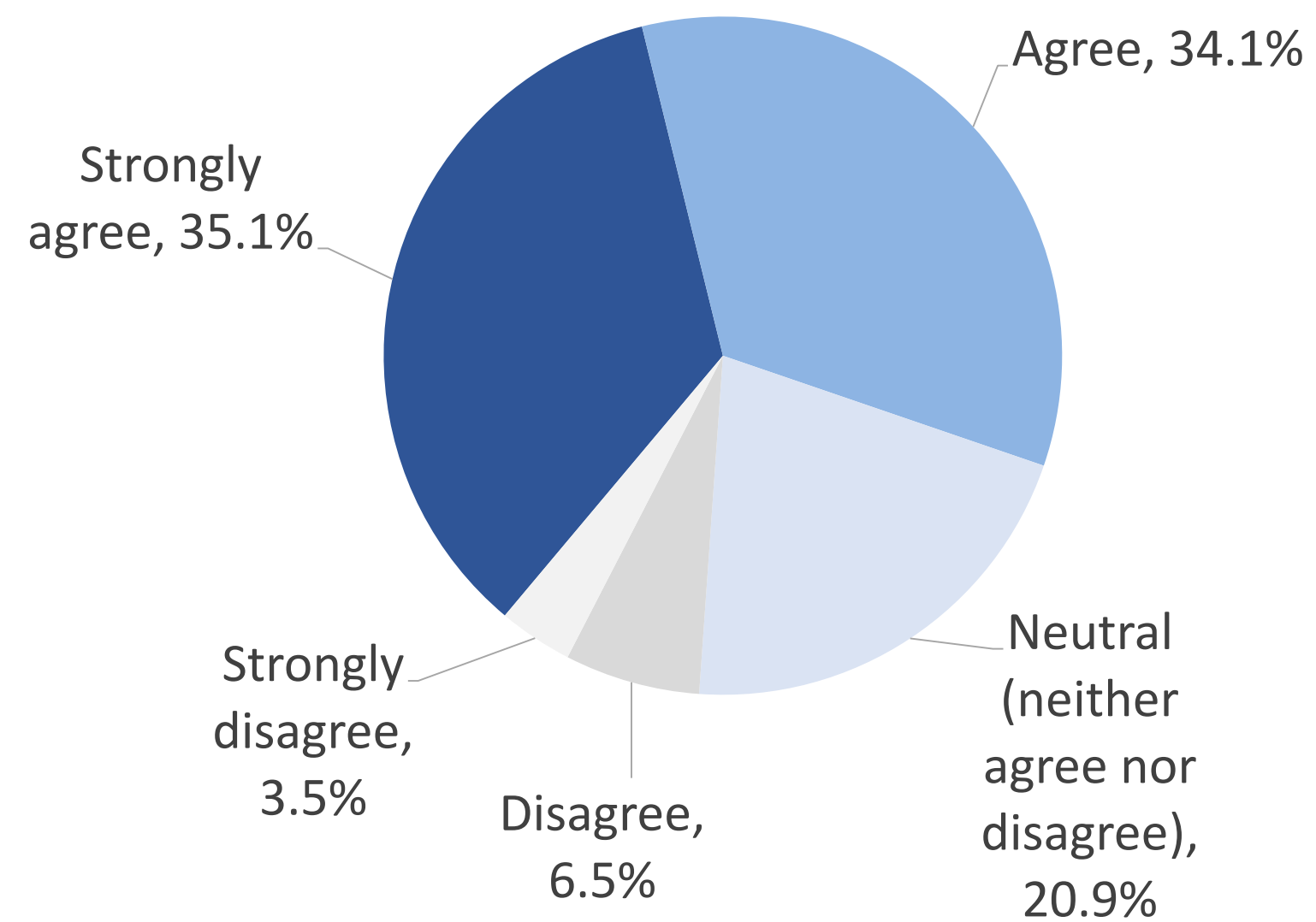


% Somewhat unsafe or Very unsafe

Excited to Get Back to Traveling

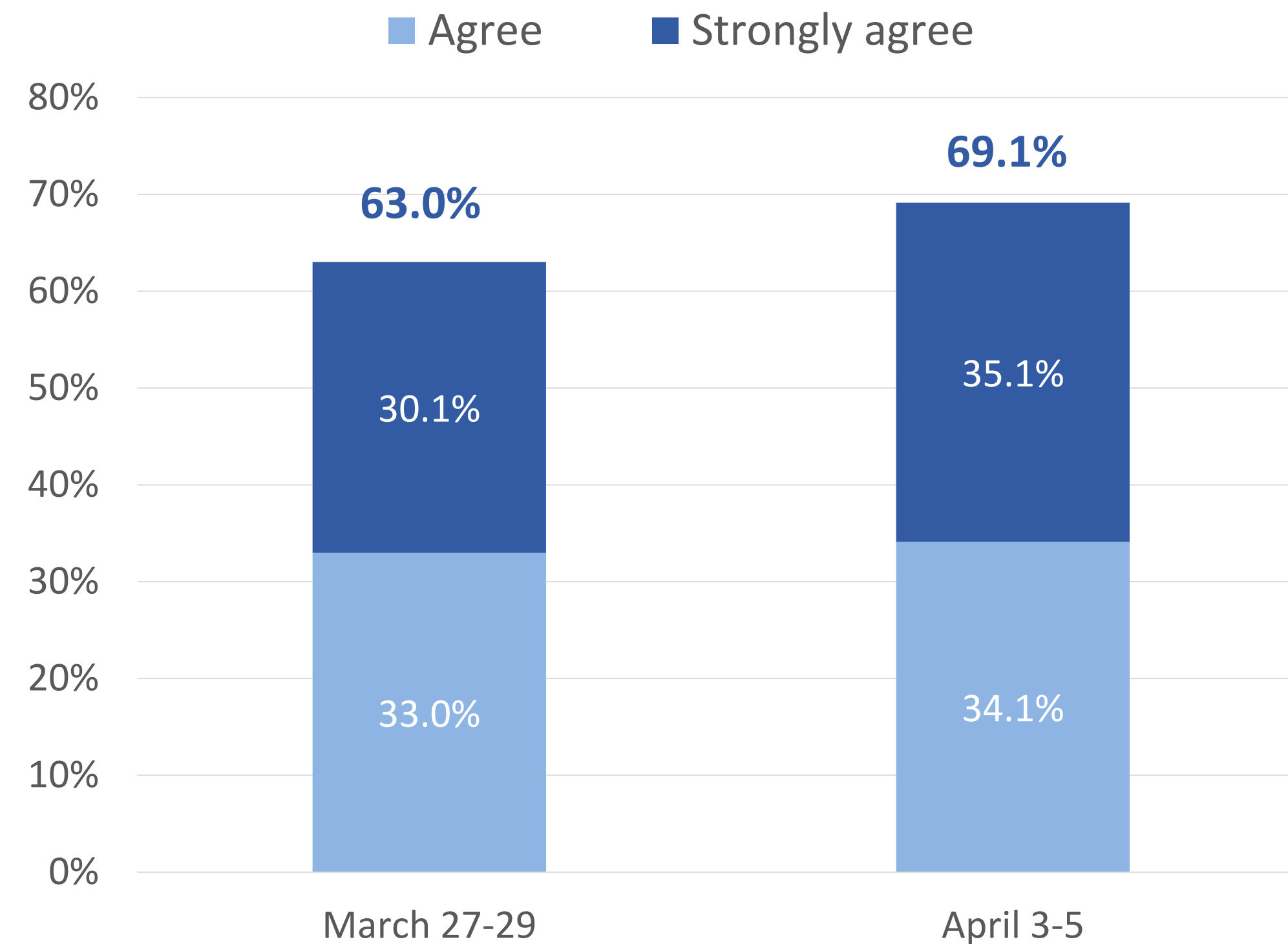
How much do you agree with the following statement?

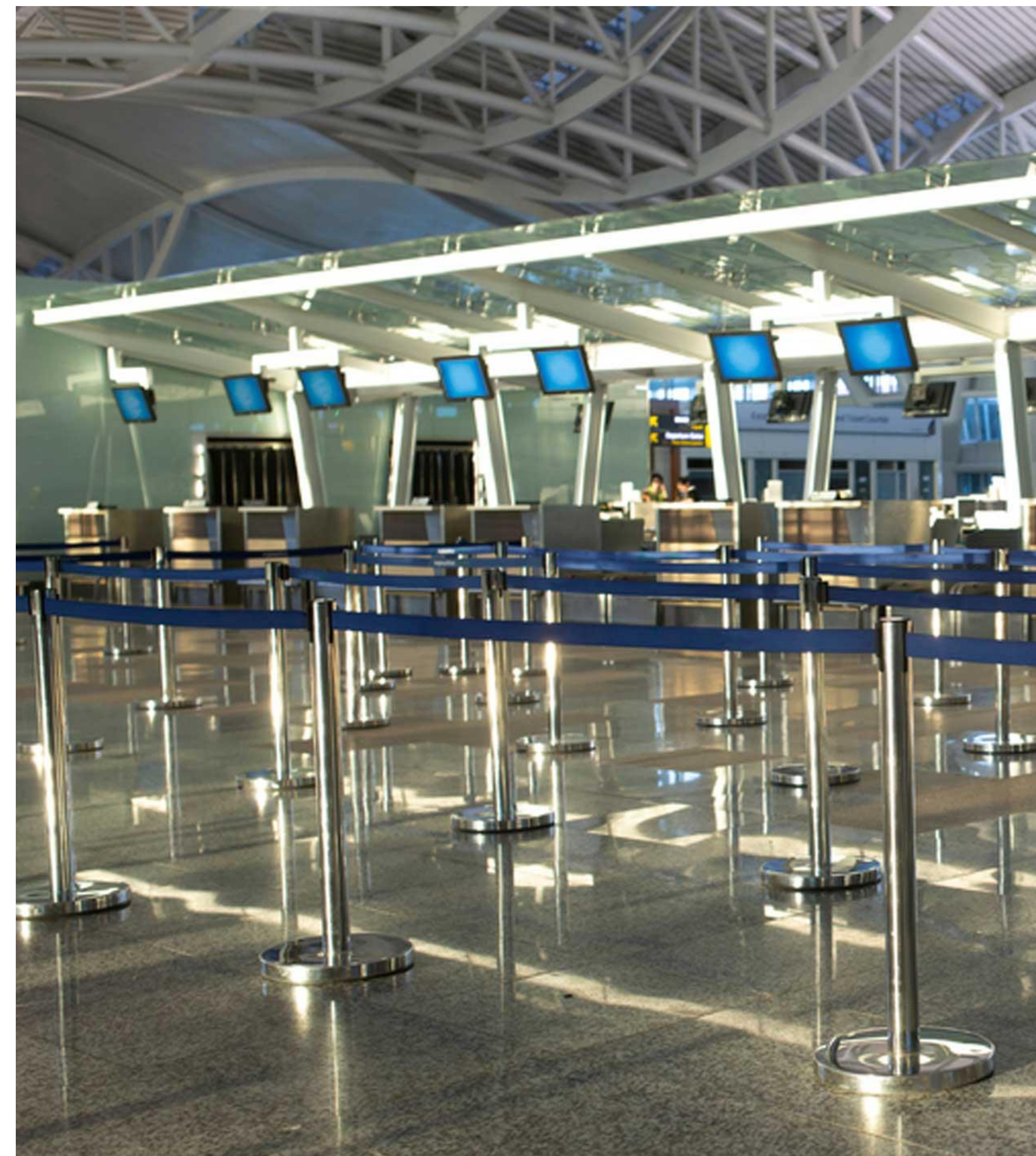
Question: I miss traveling. I can't wait to get out and travel again.



(Base: All respondents, 1,201 and 1,216 completed surveys. Data collected March 27-29 and April 3-5, 2020)

Traveler excitement to get back out on the road increased this week, as nearly 70 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.





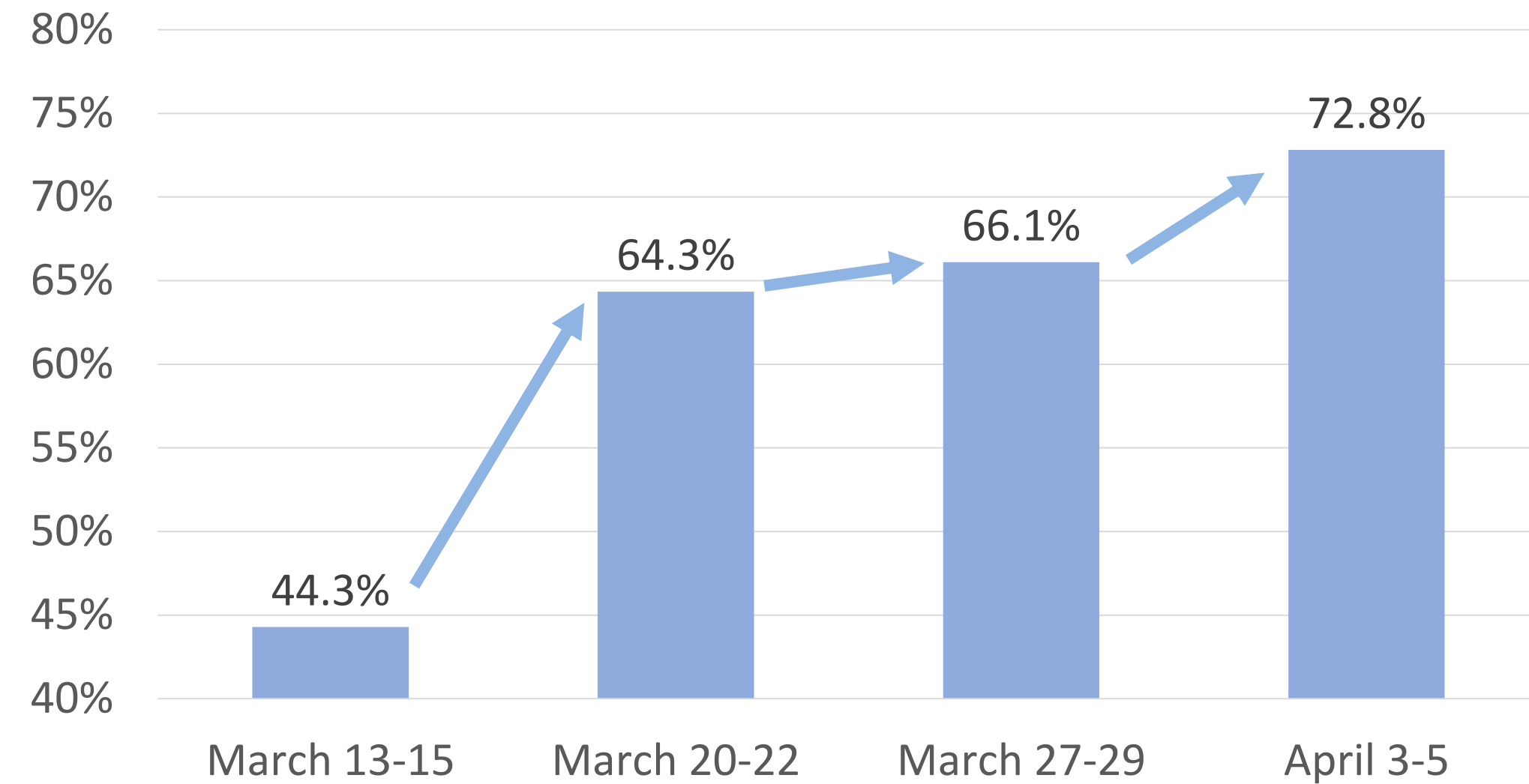
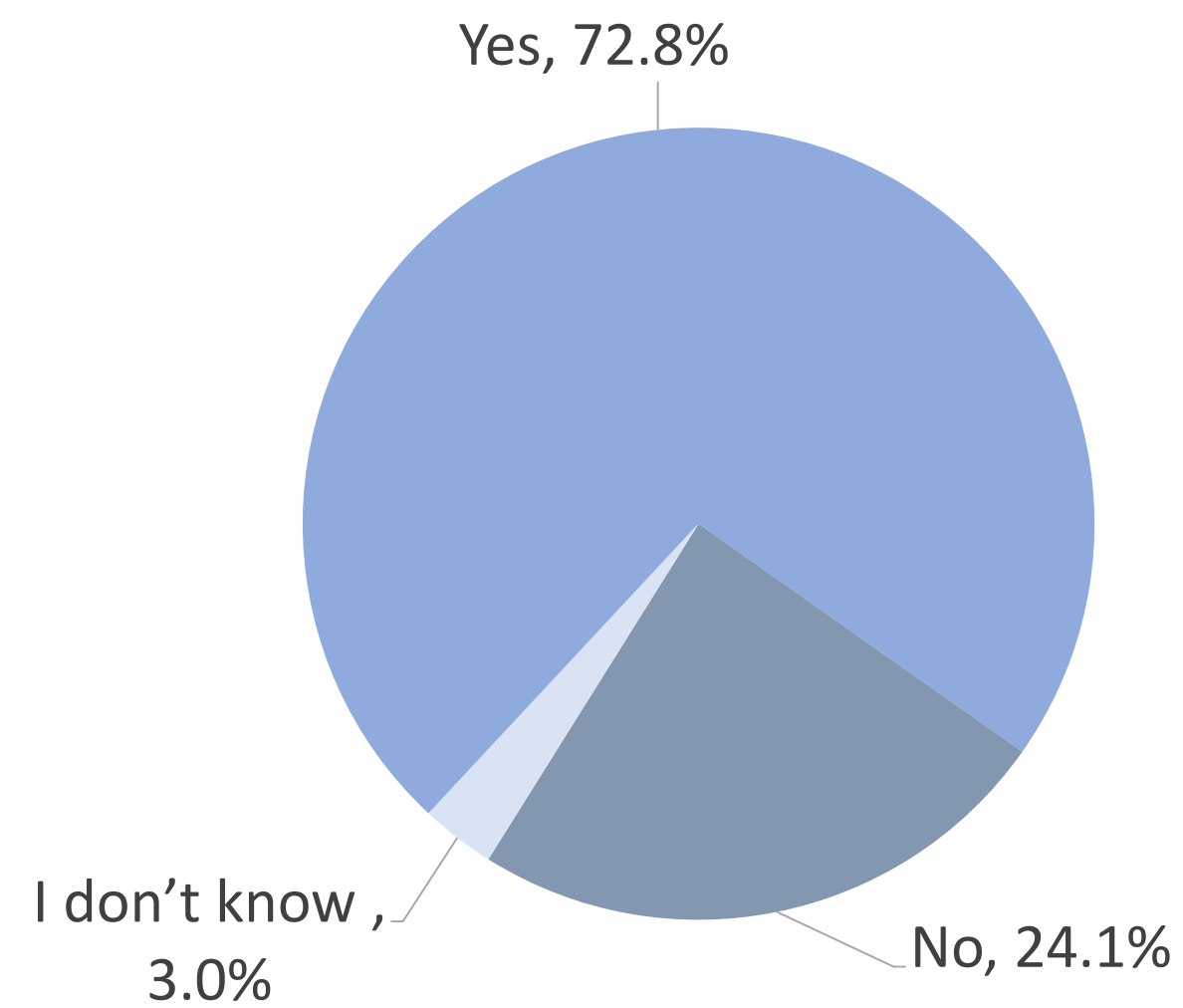
Section II: Impacts on Travel

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.)

In the fourth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus increased to 72.8 percent.

Wave 4 (April 3-5)



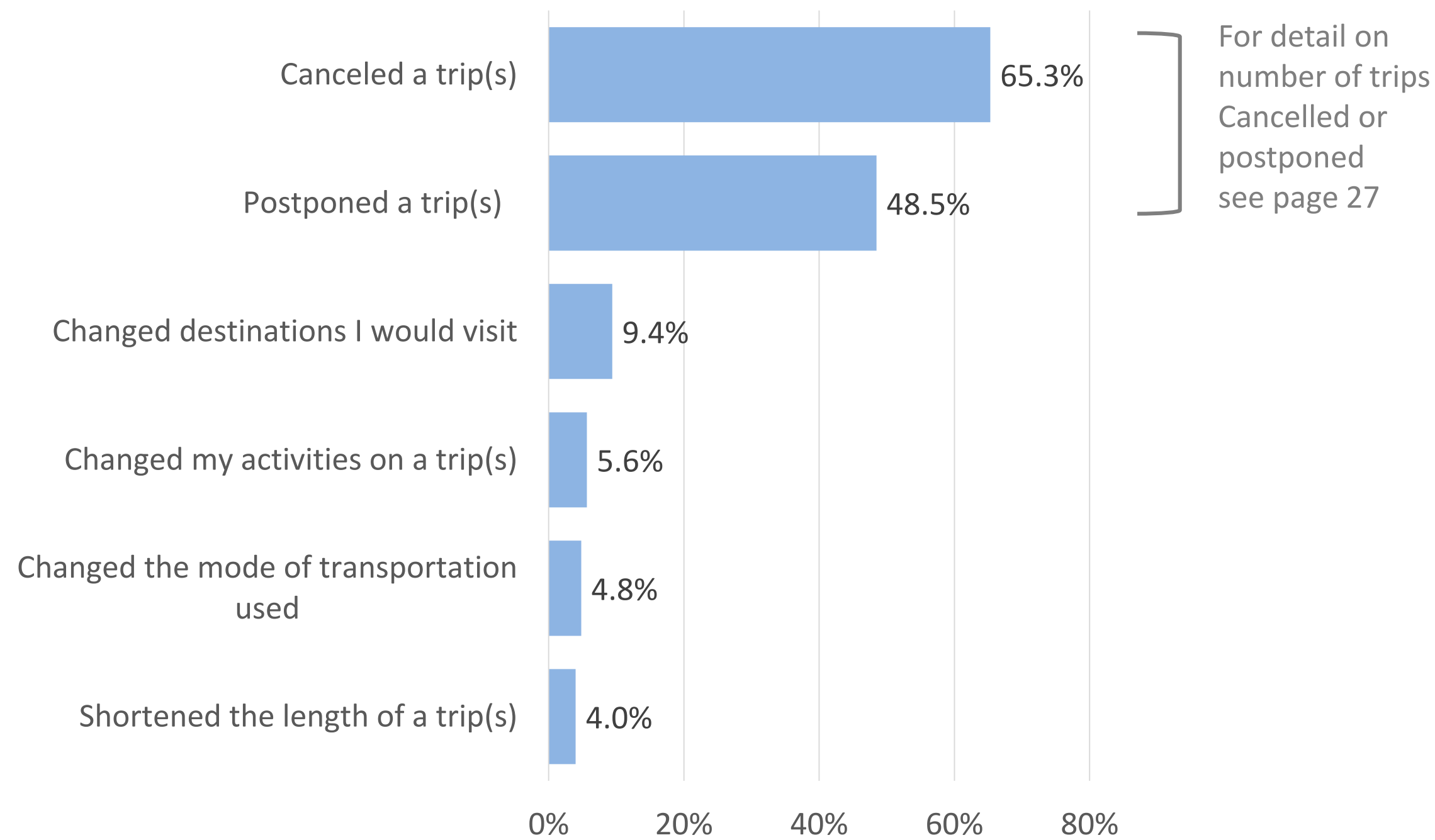
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

How the Coronavirus has Impacted Travel

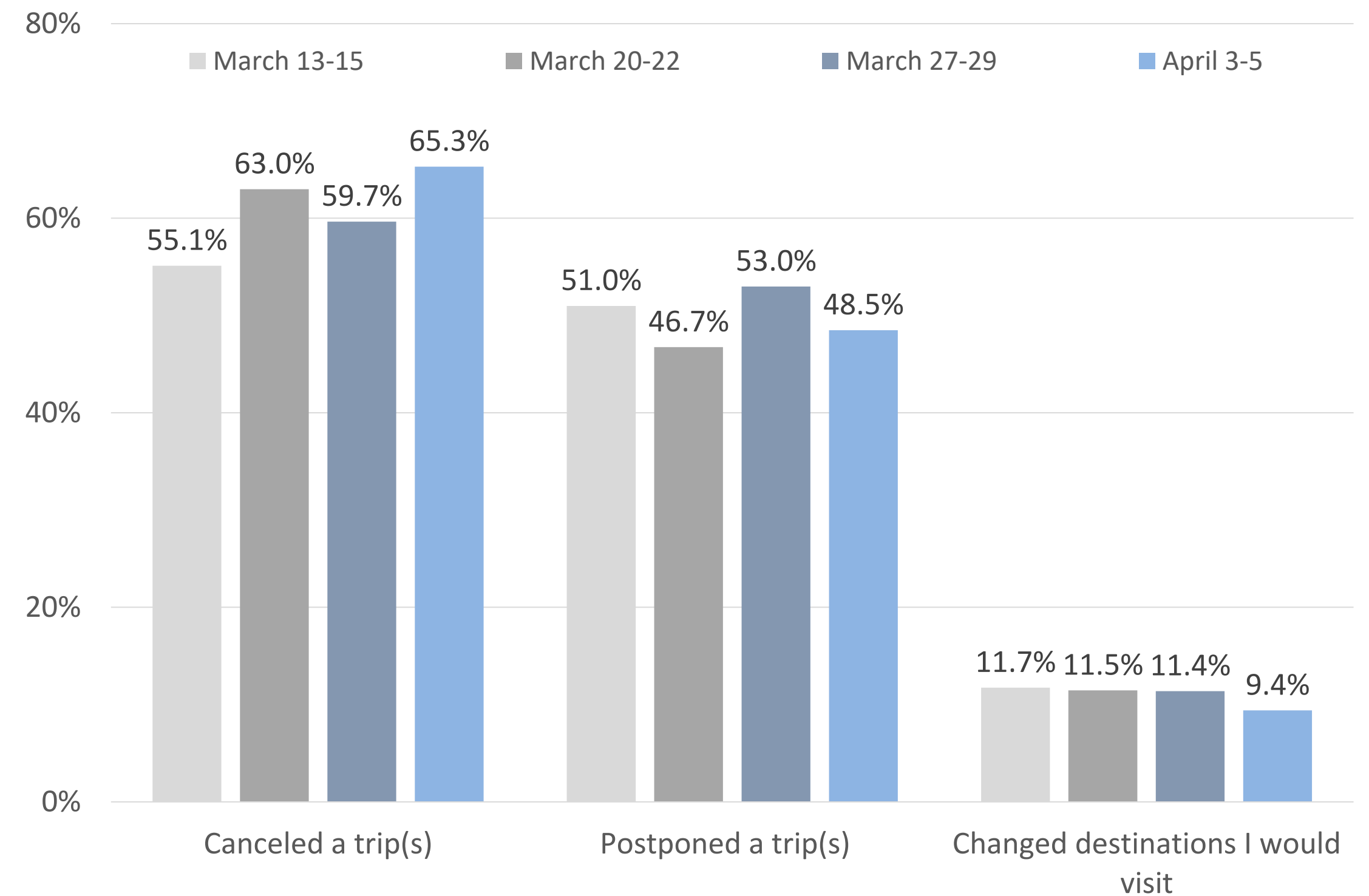
Question: How has coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have_____.

Wave 4 (April 3-5)



This week, 65.3 percent of travelers said they had cancelled a trip, compared to 59.7 percent last week. Postponements were down slightly to 48.5 percent this week, from 53.0 percent last week.



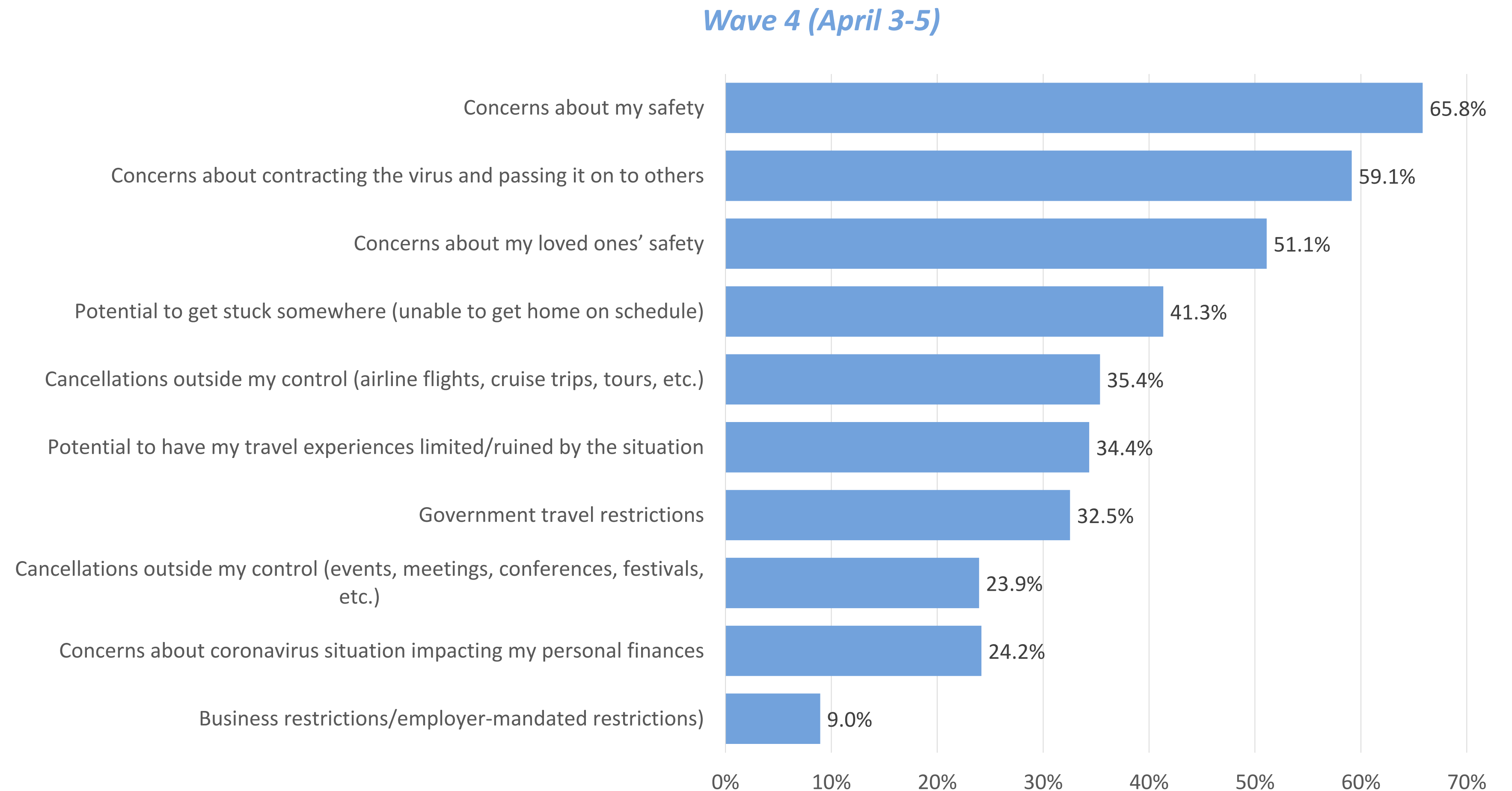
(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795 and 890 completed surveys. Data collected March 13-15, 20-22, 27-29, and April 3-5, 2020)

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 two-thirds of respondents citing it as a reason (65.8%).

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

(Base: Respondents whose travel was impacted by the coronavirus, 889 completed surveys. Data collected April 3-5, 2020)



Why the Coronavirus is Impacting Travel (Detailed Changes)

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

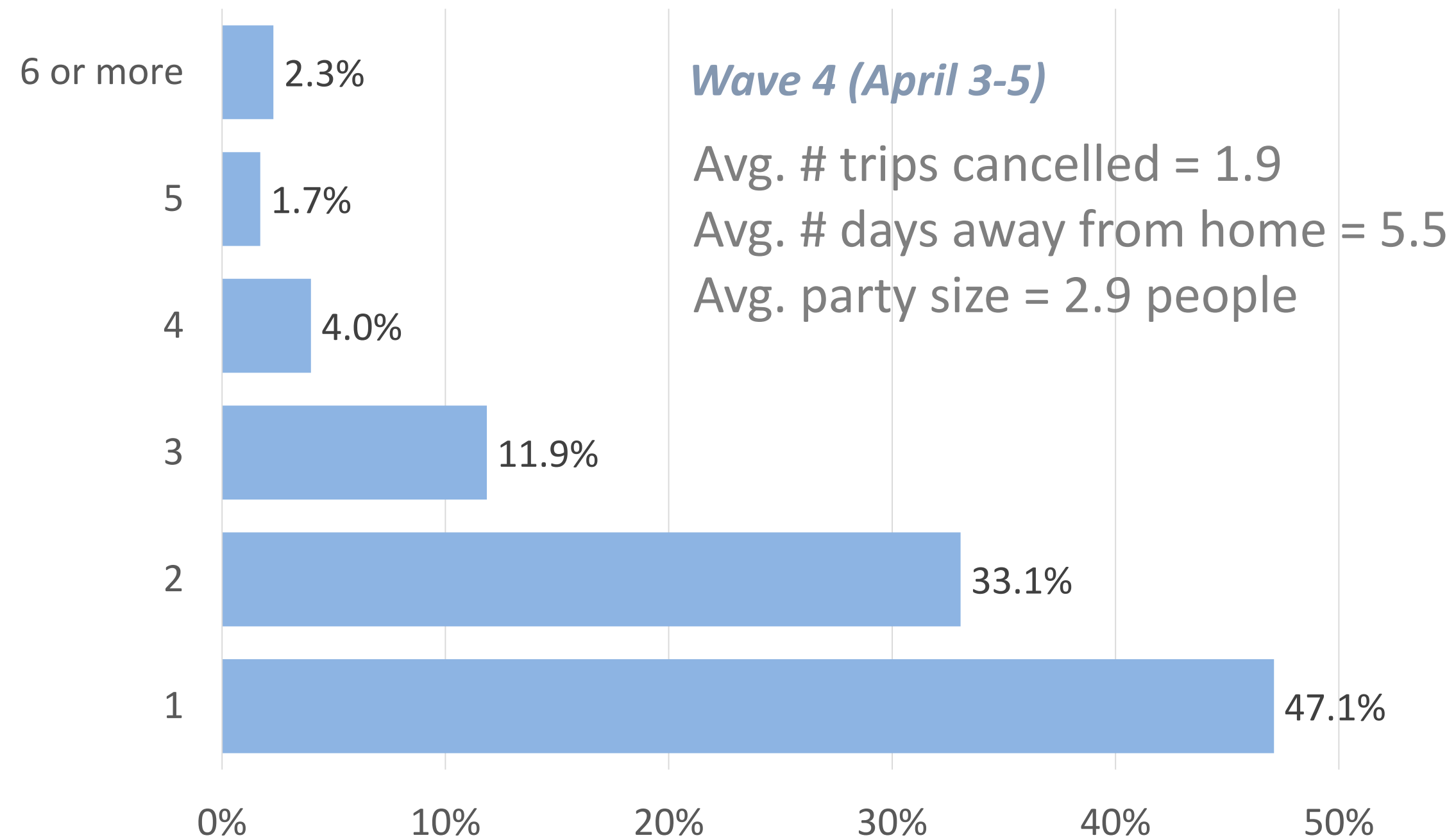
(Base: Respondents whose travel was impacted by the coronavirus, 552, 768, 792, 889 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 2020)

	March 13-15	March 20-22	March 27-29	April 3-5	% CHNG (Waves 3-4)
Concerns about my safety	60.1%	62.8%	65.6%	65.8%	0.3%
Concerns about contracting the virus and passing it on to others	60.8%	56.4%	64.0%	59.1%	-7.5%
Concerns about my loved ones' safety	49.4%	52.4%	54.6%	51.1%	-6.3%
Potential to get stuck somewhere (unable to get home on schedule)	40.1%	42.4%	41.8%	41.3%	-1.2%
Cancellations outside my control (airline flights, cruise trips, tours, etc.)	28.0%	32.9%	36.7%	35.4%	-3.7%
Potential to have my travel experiences limited/ruined by the situation	30.2%	37.0%	36.7%	34.4%	-6.5%
Government travel restrictions	16.9%	30.6%	30.6%	32.5%	6.2%
Cancellations outside my control (events, meetings, conferences, festivals, etc.)	23.1%	27.4%	23.4%	23.9%	2.3%
Concerns about coronavirus situation impacting my personal finances	15.0%	23.0%	22.7%	24.2%	6.6%
Business restrictions/employer-mandated restrictions)	6.8%	8.8%	9.4%	9.0%	-5.0%
Base	552	768	792	889	

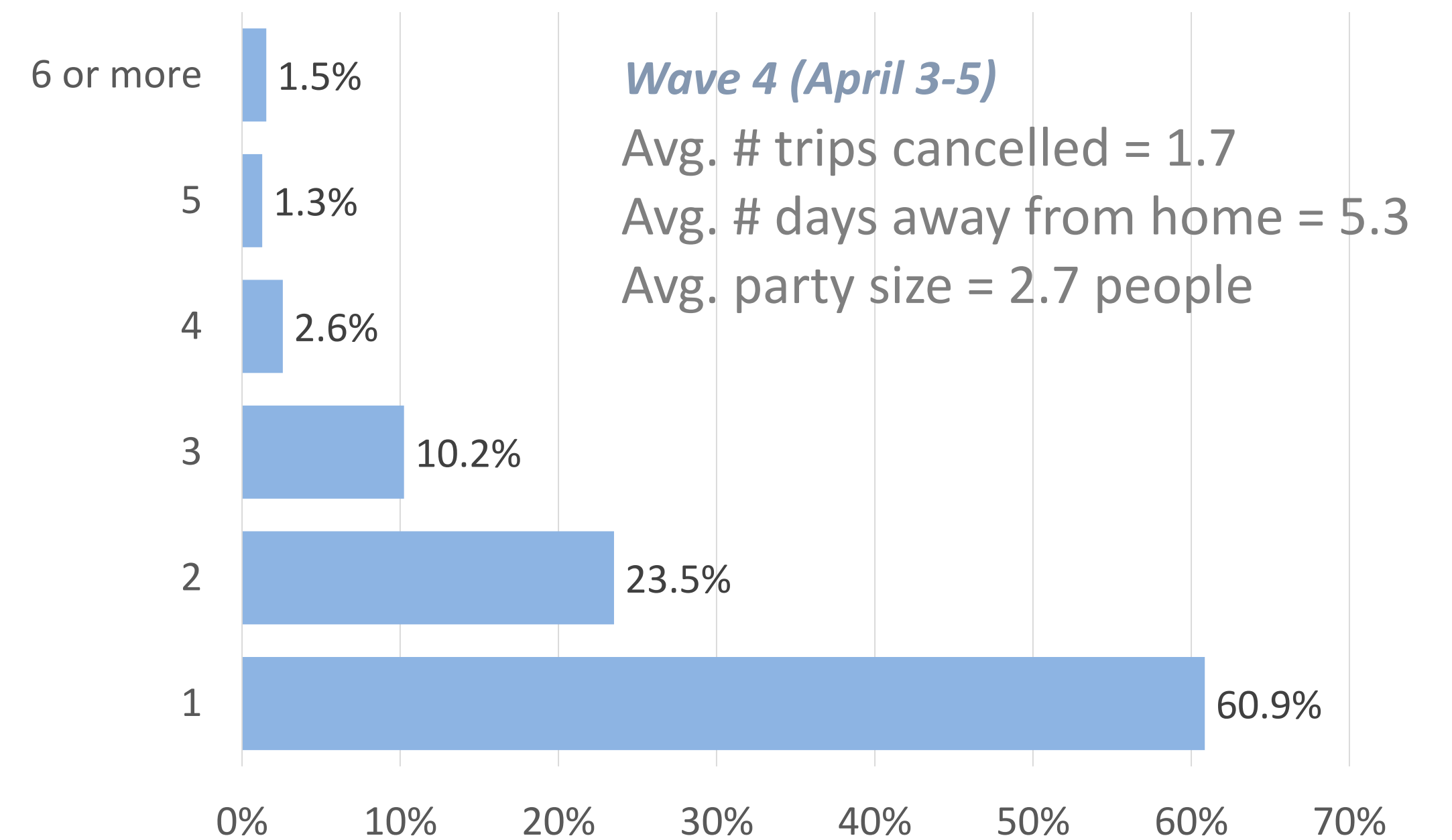
Trips Cancelled/Postponed

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?



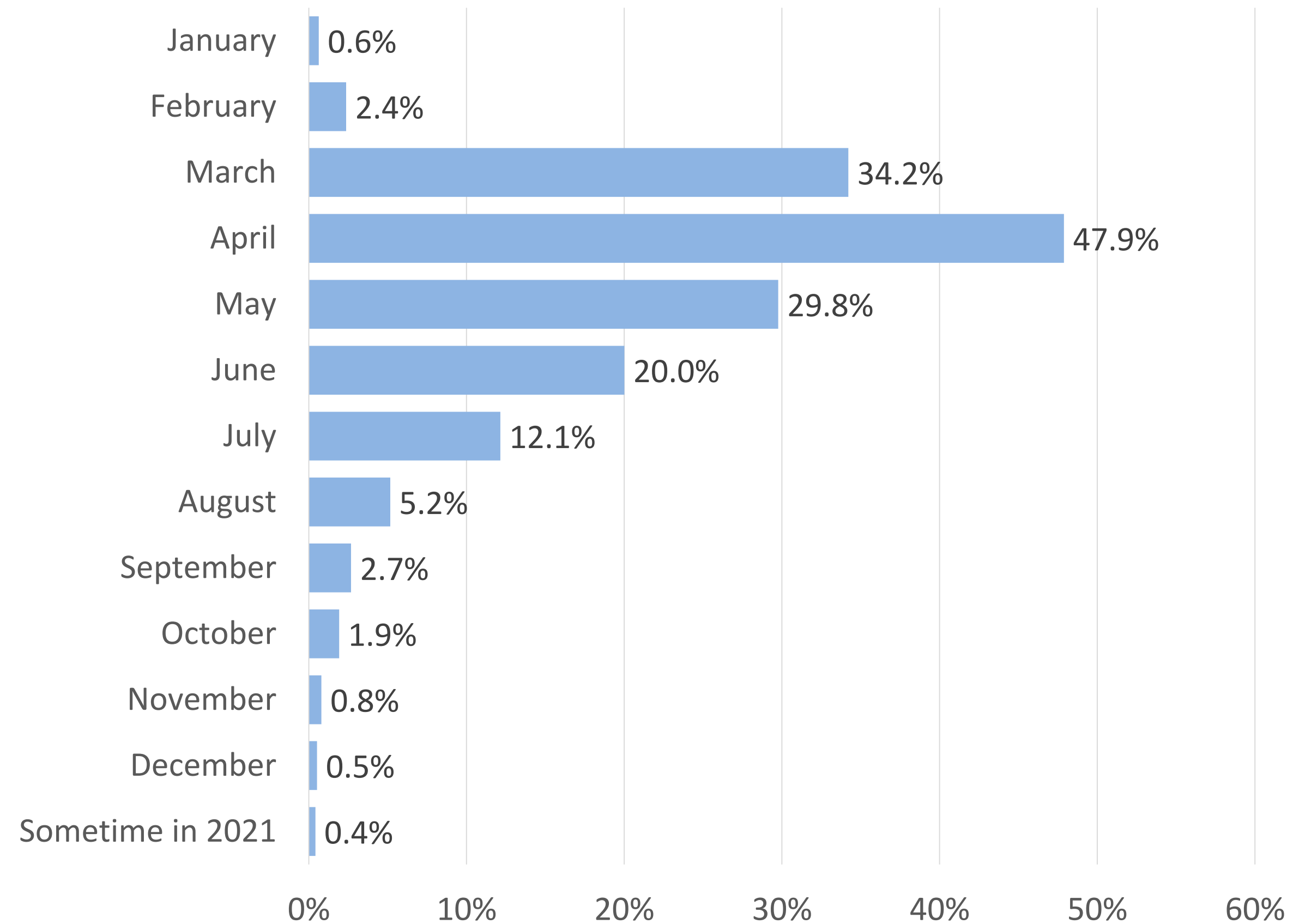
(Base: Respondents cancelling/postponing a trip, 581/435 completed surveys. Data collected April 3-5th, 2020)

Month of Trip Cancellation

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

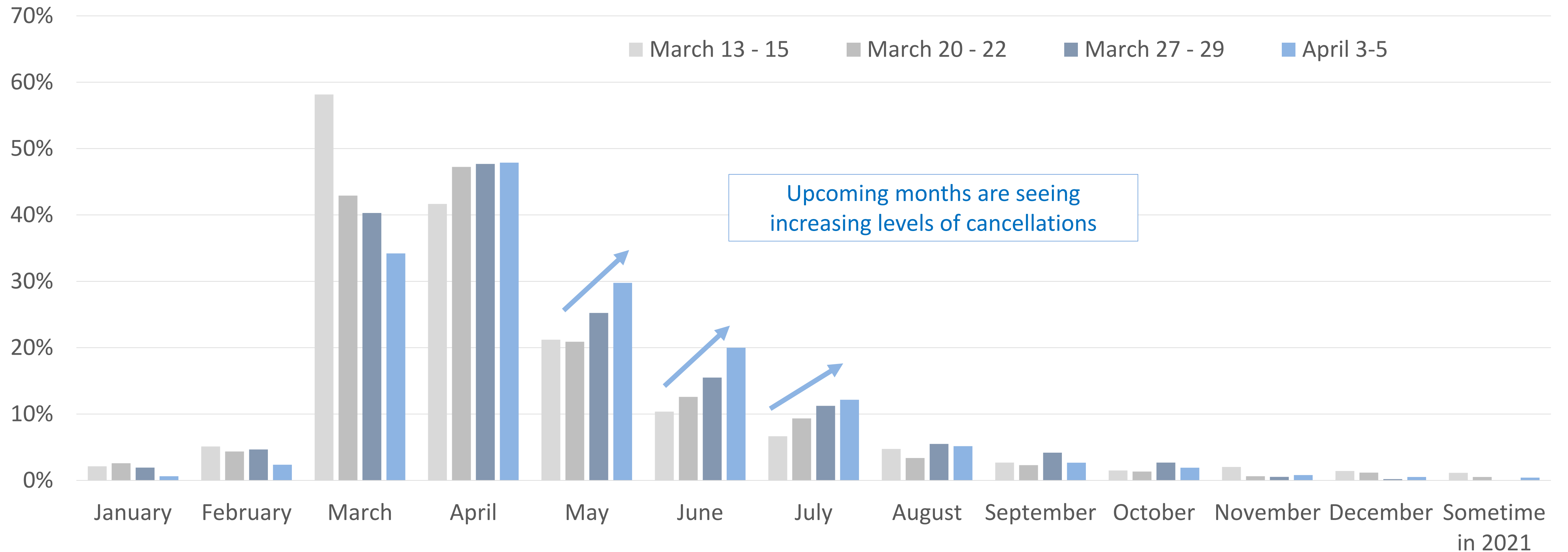
*(Base: Cancelling trips, 580 completed surveys.
Data collected April 3-5, 2020)*

A majority of travel cancellations appear to be near-term bookings. In this survey wave, there are continued increases in the cancellation of June and July trips (see next page).



Month of Trip Cancellation

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

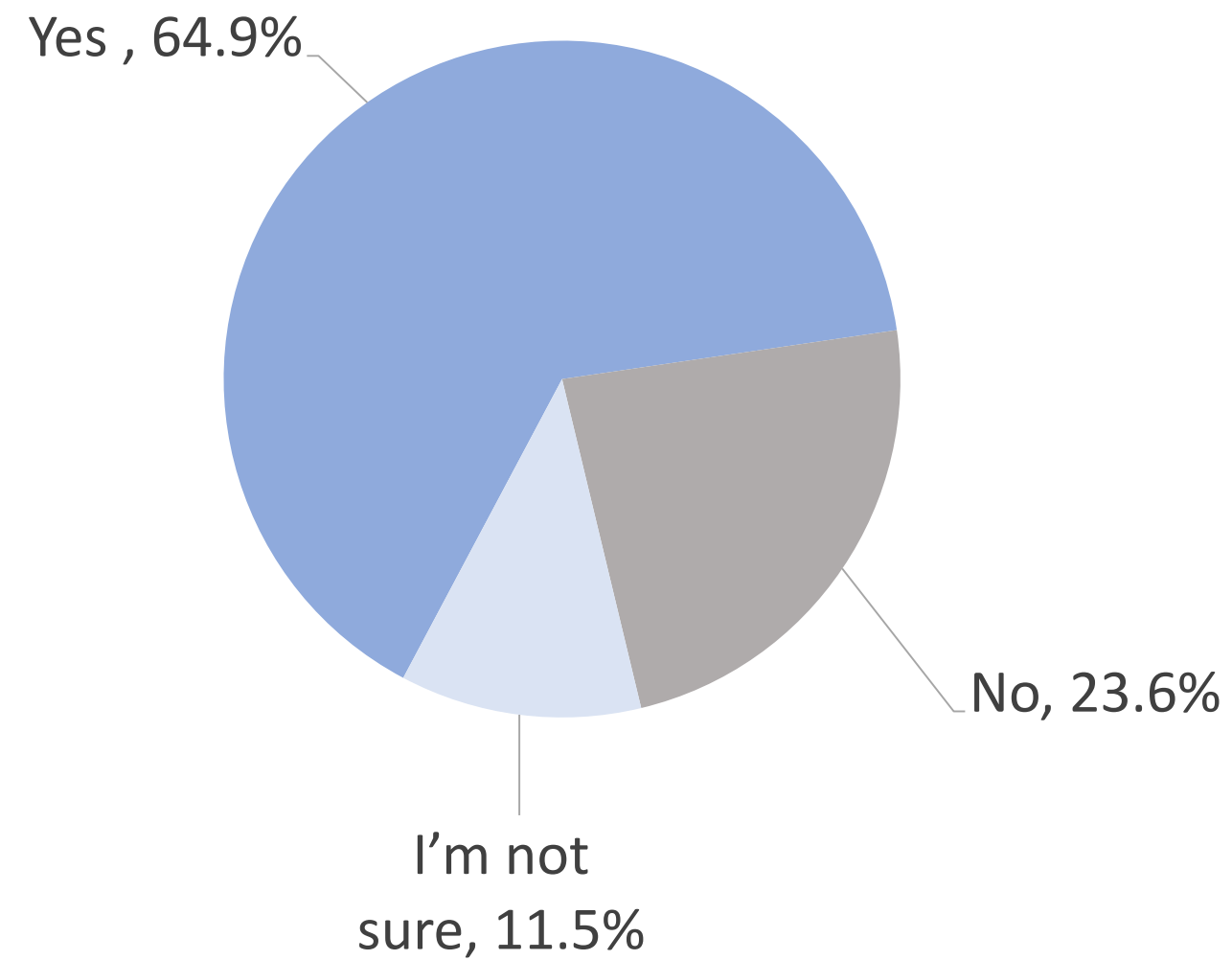


*(Base: Cancelling trips, 292, 477, 506 and 580 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020.
Note: Data purposefully excluded from this chart for readability.)*

Did Traveler Get Full Refunds?

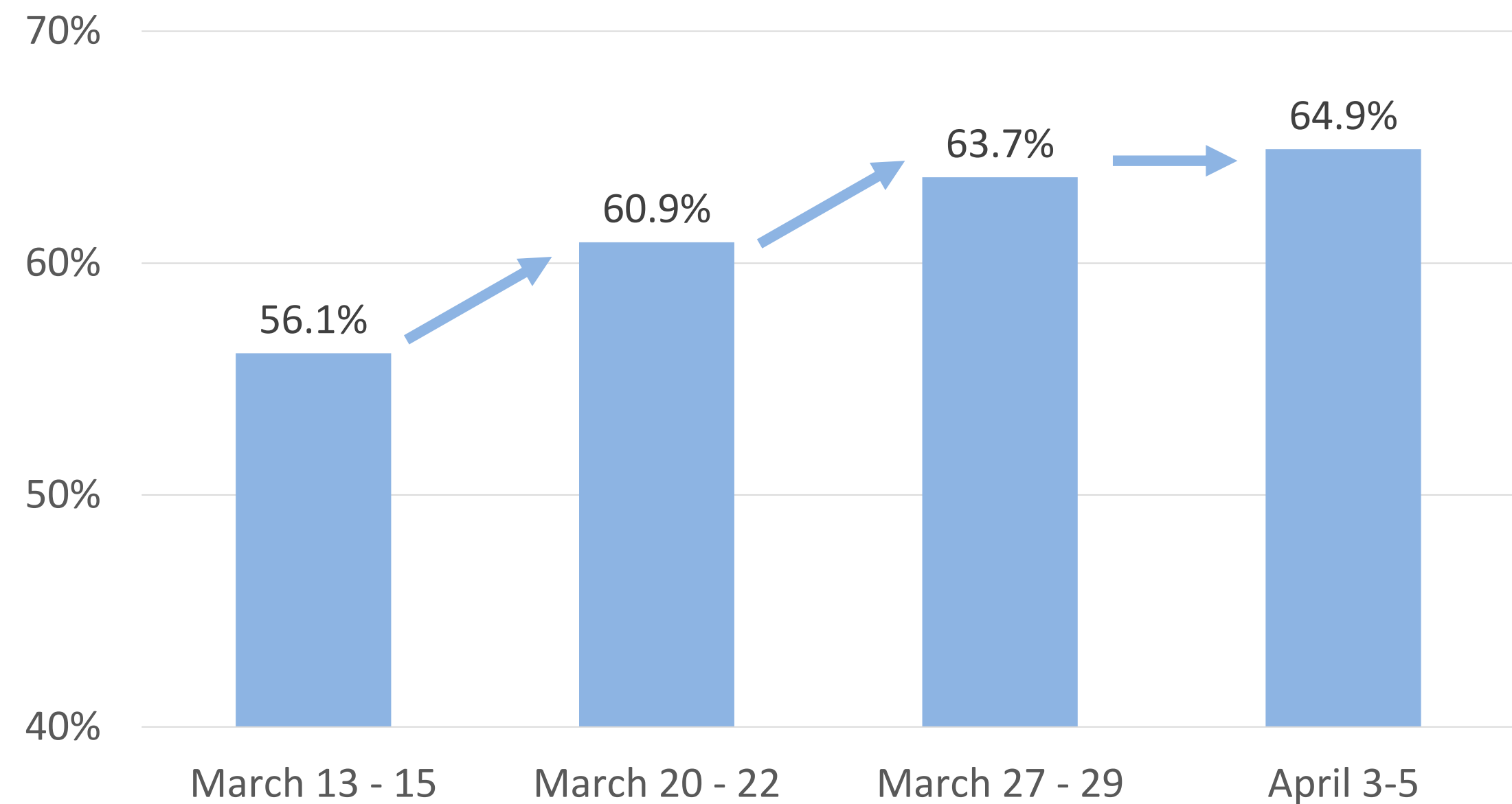
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 4 (April 3-5)



(Base: Respondents cancelling a trip, 580 completed surveys. Data collected April 3-5, 2020)

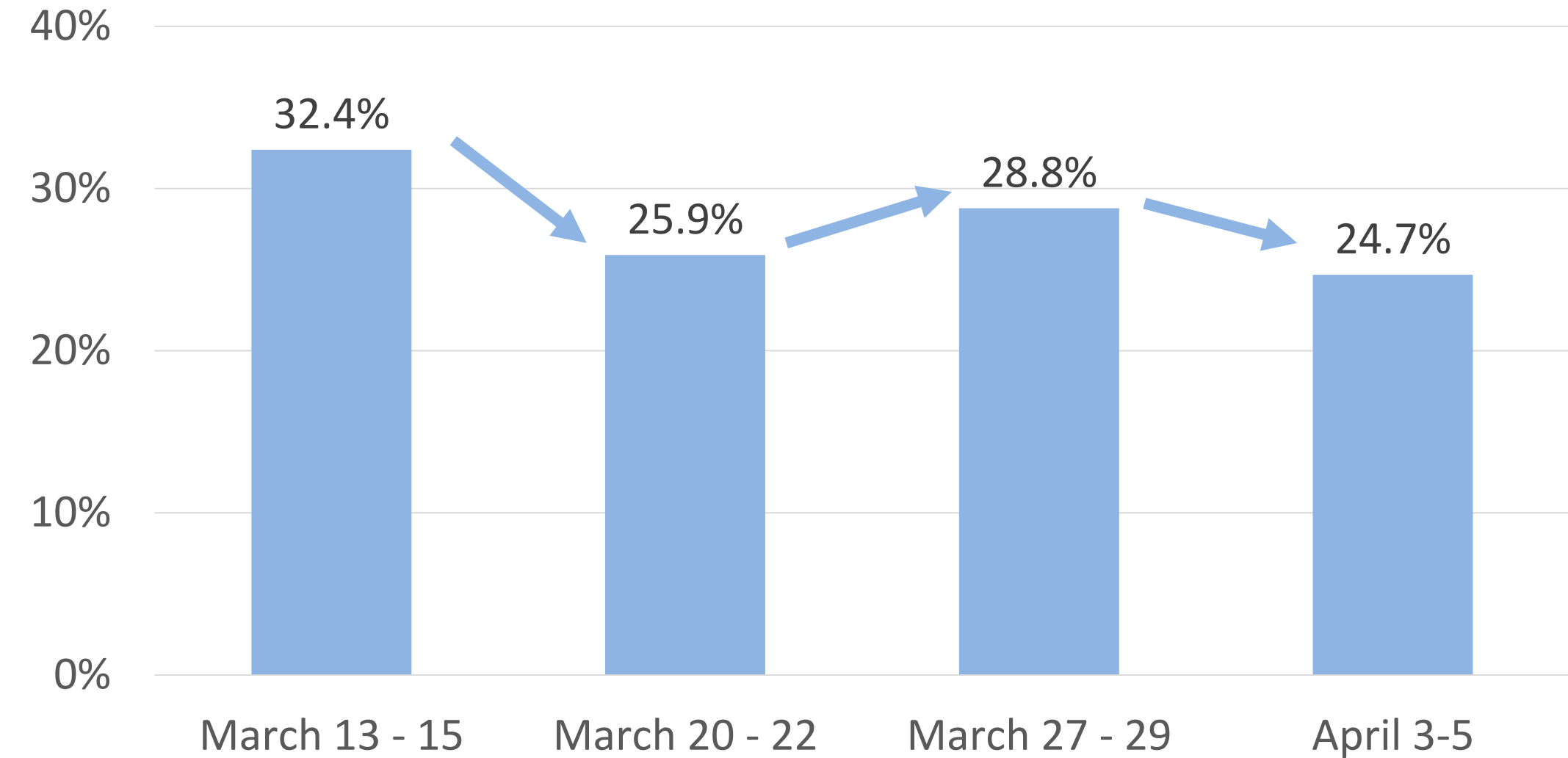
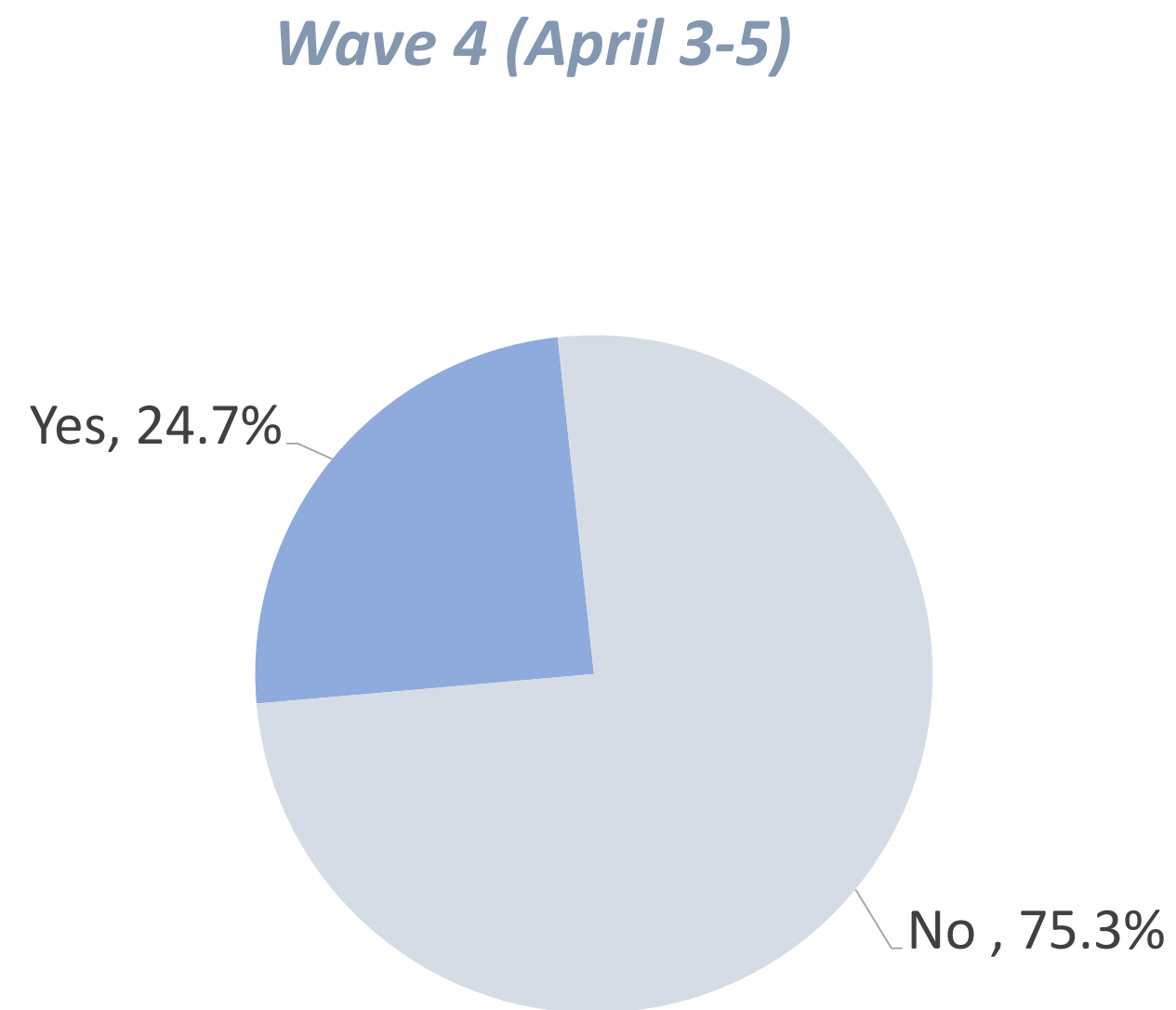
Growth in the proportion of travelers being fully refunded for cancelled trips has slowed. This week, 64.9 percent report receiving full refunds, compared to 63.7 percent last week.



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?

Approximately three-quarters of postponed trips (75.3%) are not currently being rescheduled.

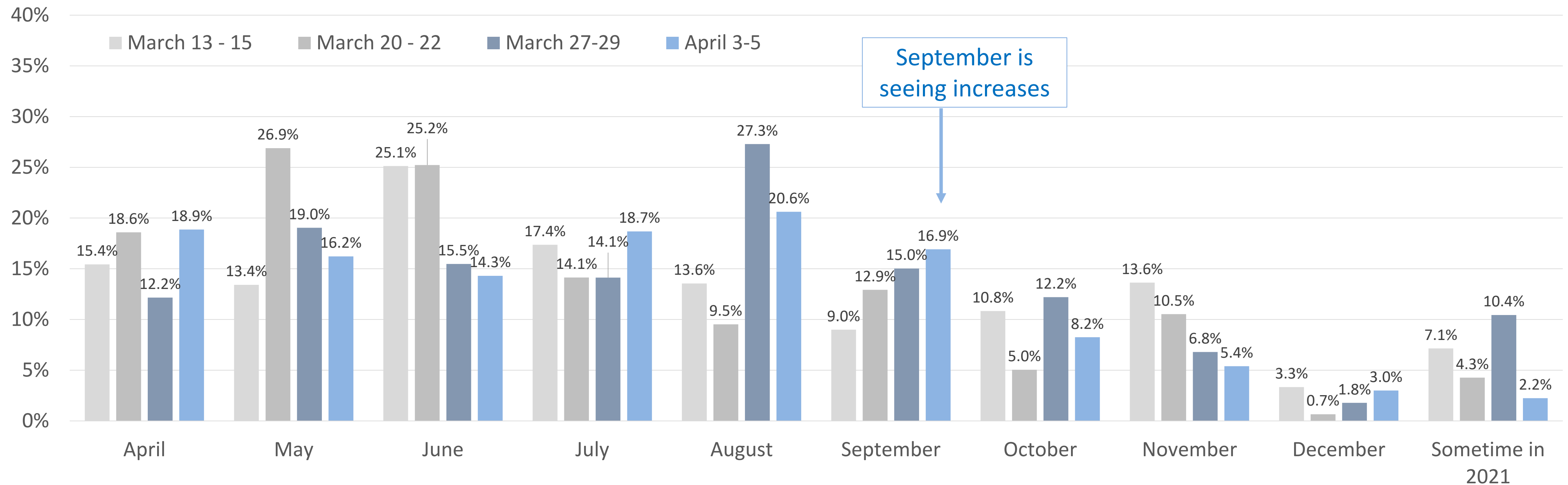


(Base: Postponing trips, 277, 354, 404, and 433 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Month Postponed Trips Rescheduled

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

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

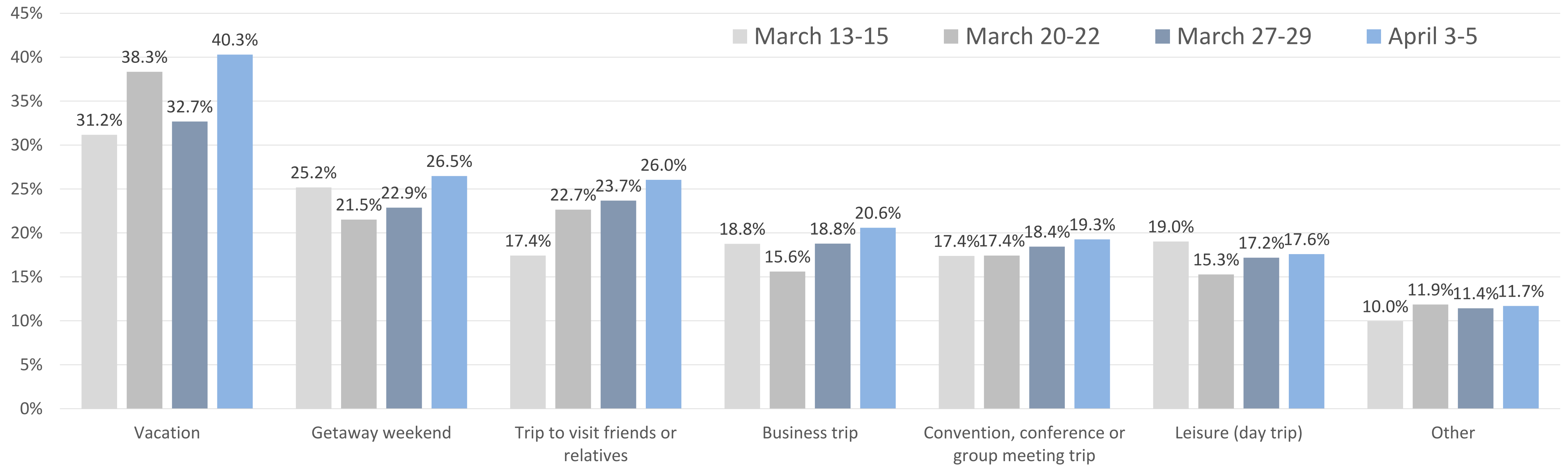


(Base: Postponing trips rescheduled, 99,86, 120 and 107 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Types of Trips Cancelled

Over the course of the month, we have seen increases in the proportion of travelers cancelling vacations, weekend getaways and trips to visit friends and relatives.

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

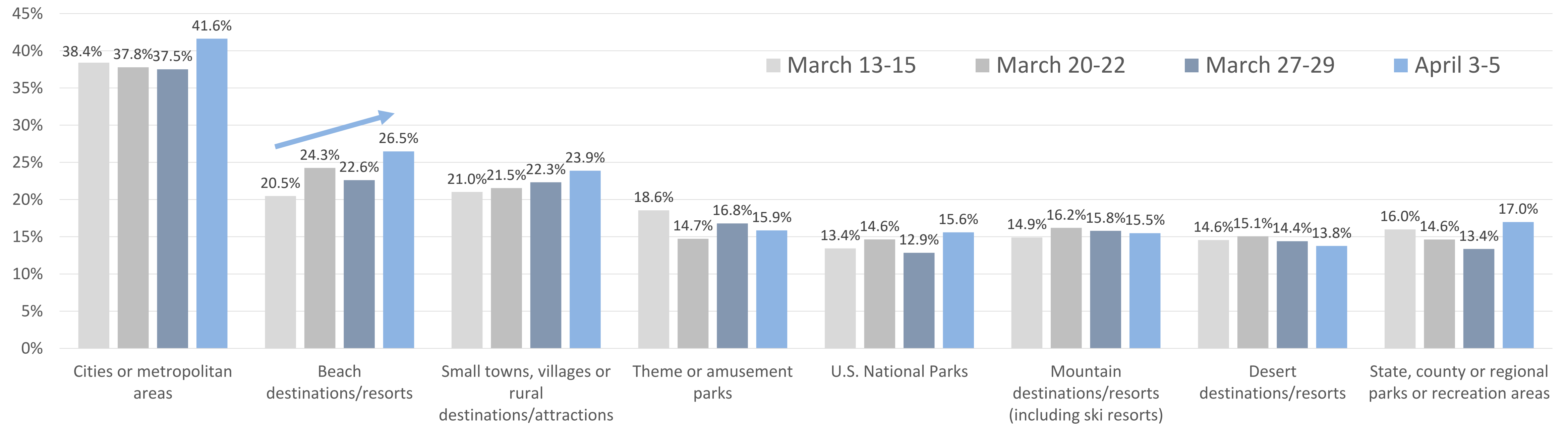


(Base: Cancelling trips, 292, 477, 506 and 580 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Types of Destinations Cancelled

Again, in this wave there were no major changes in the types of destinations being cancelled. However, with the fourth survey wave, it appears that beach destinations and resorts have seen an increase in cancellation activity.

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

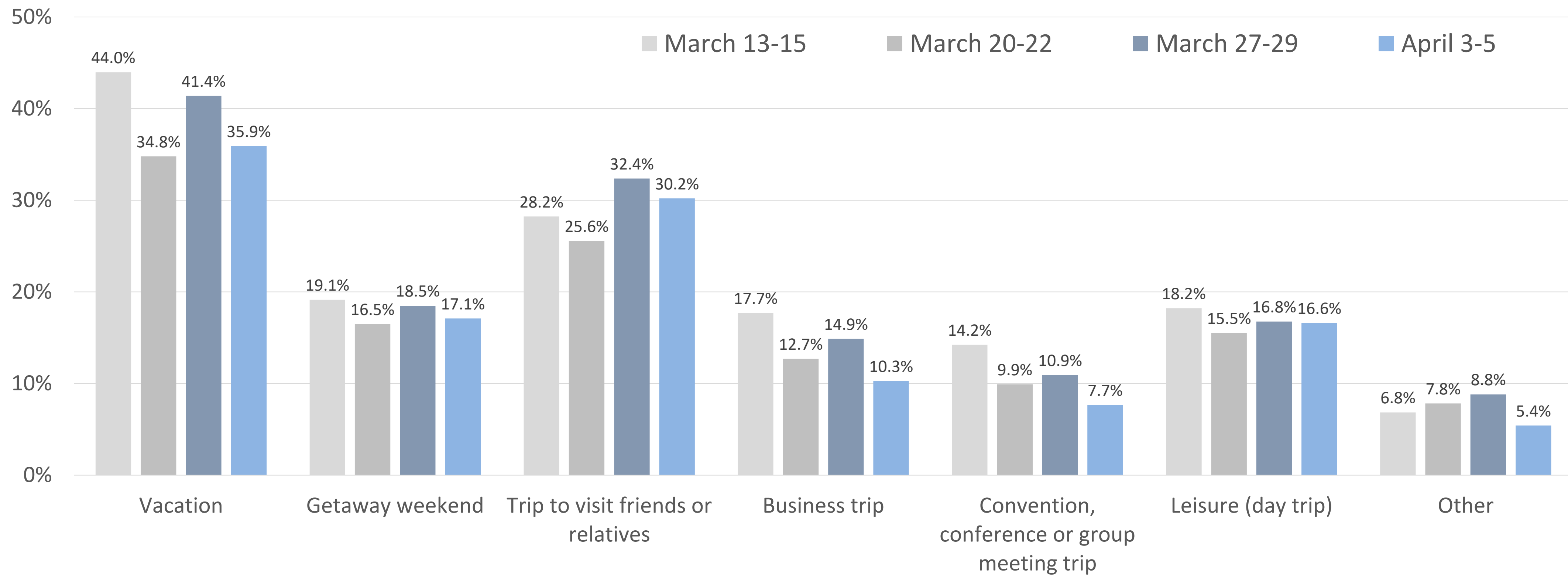


(Base: Cancelling trips, 292, 477, 506 and 580 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Types of Trips Postponed

This week, postponements of vacations and trips to visit friends and relatives decreased after increasing last week.

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

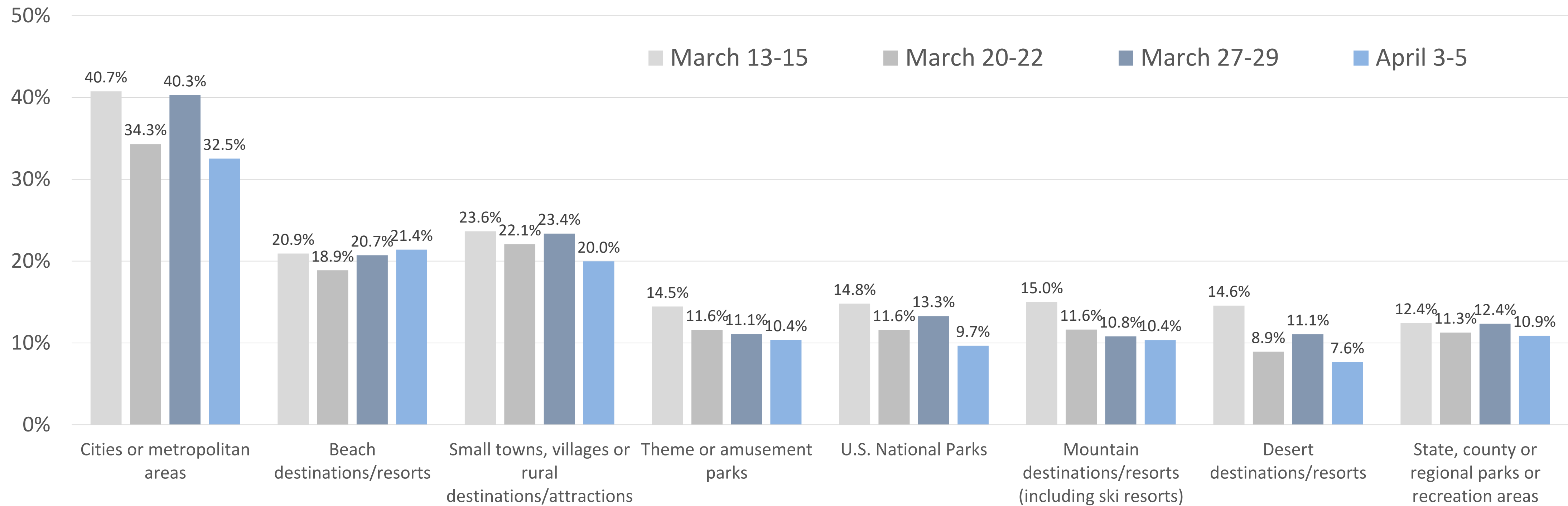


(Base: Postponing trips, 277, 354, 404 and 435 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Types of Destinations Postponed

Urban areas are still the most postponed destination type. Over the course of the month, this figure has declined to 32.5 percent.

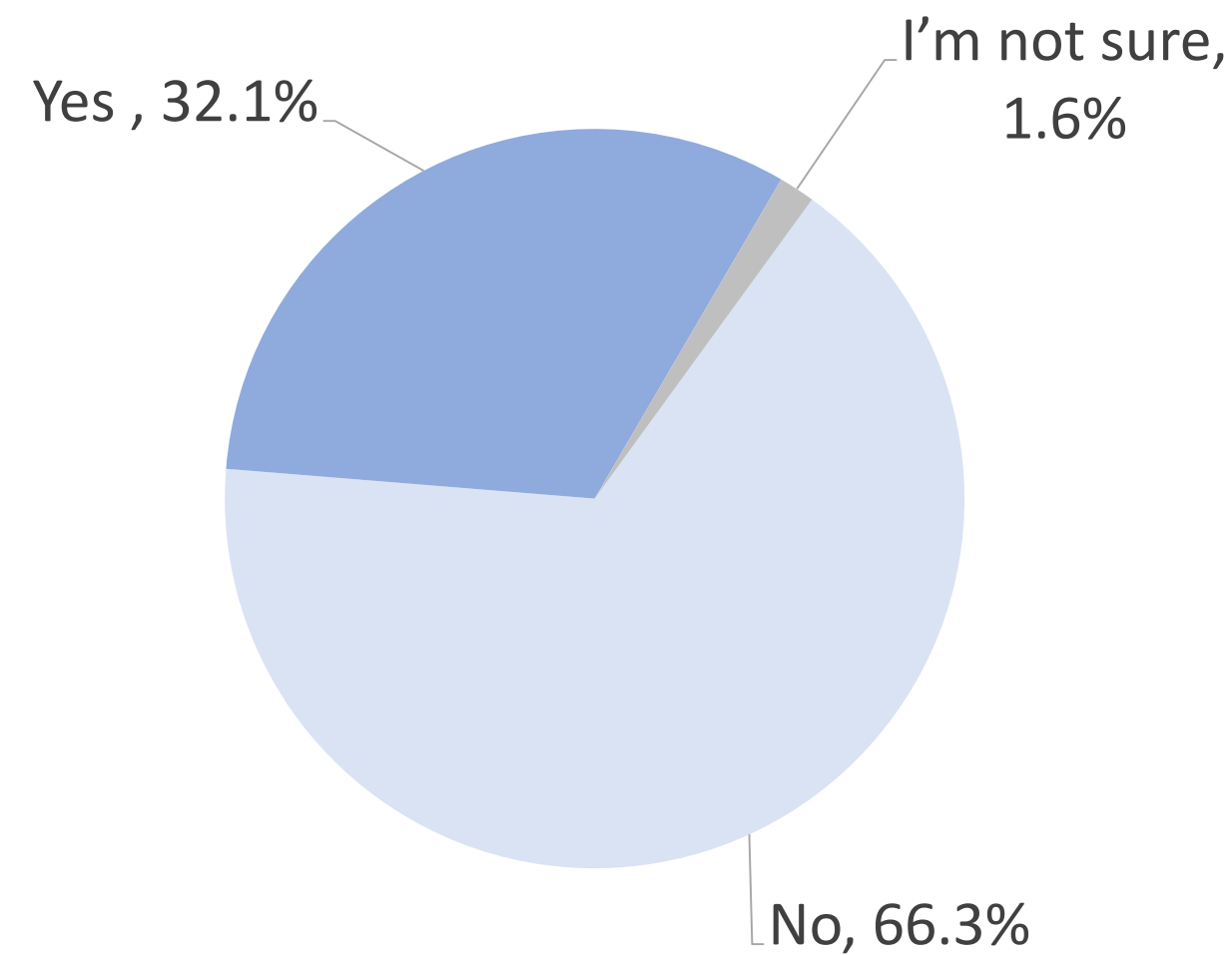
Question: Thinking about these postponed trips, which destination types were you planning to visit but ended up postponing?
(Select all that apply)



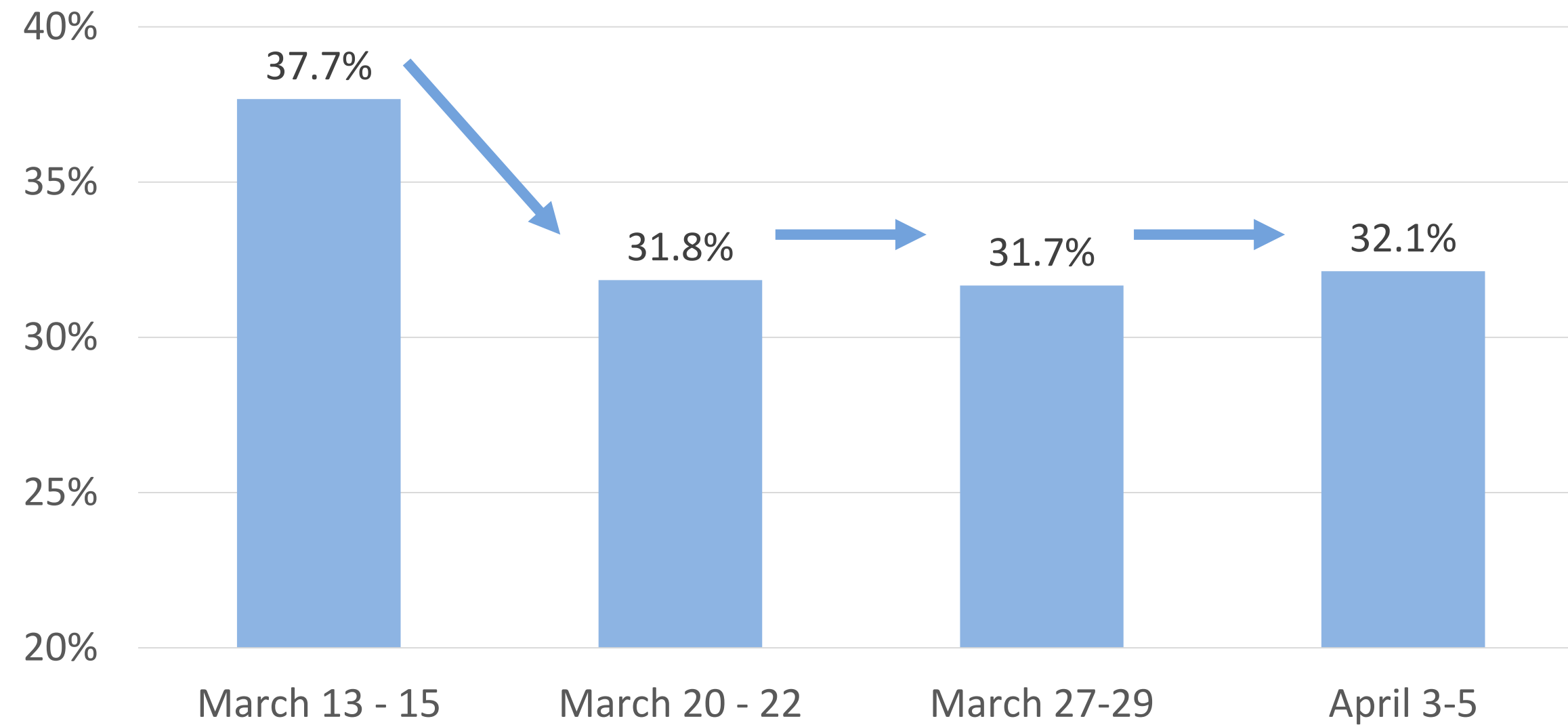
(Base: Postponing trips, 277, 354, 404 and 435 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

International Trips Postponed or 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 (32.1%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure has remained stable for the past 3 waves.



(Base: Respondents cancelling or postponing a trip, 890 completed surveys. Data collected April 3-5, 2020)

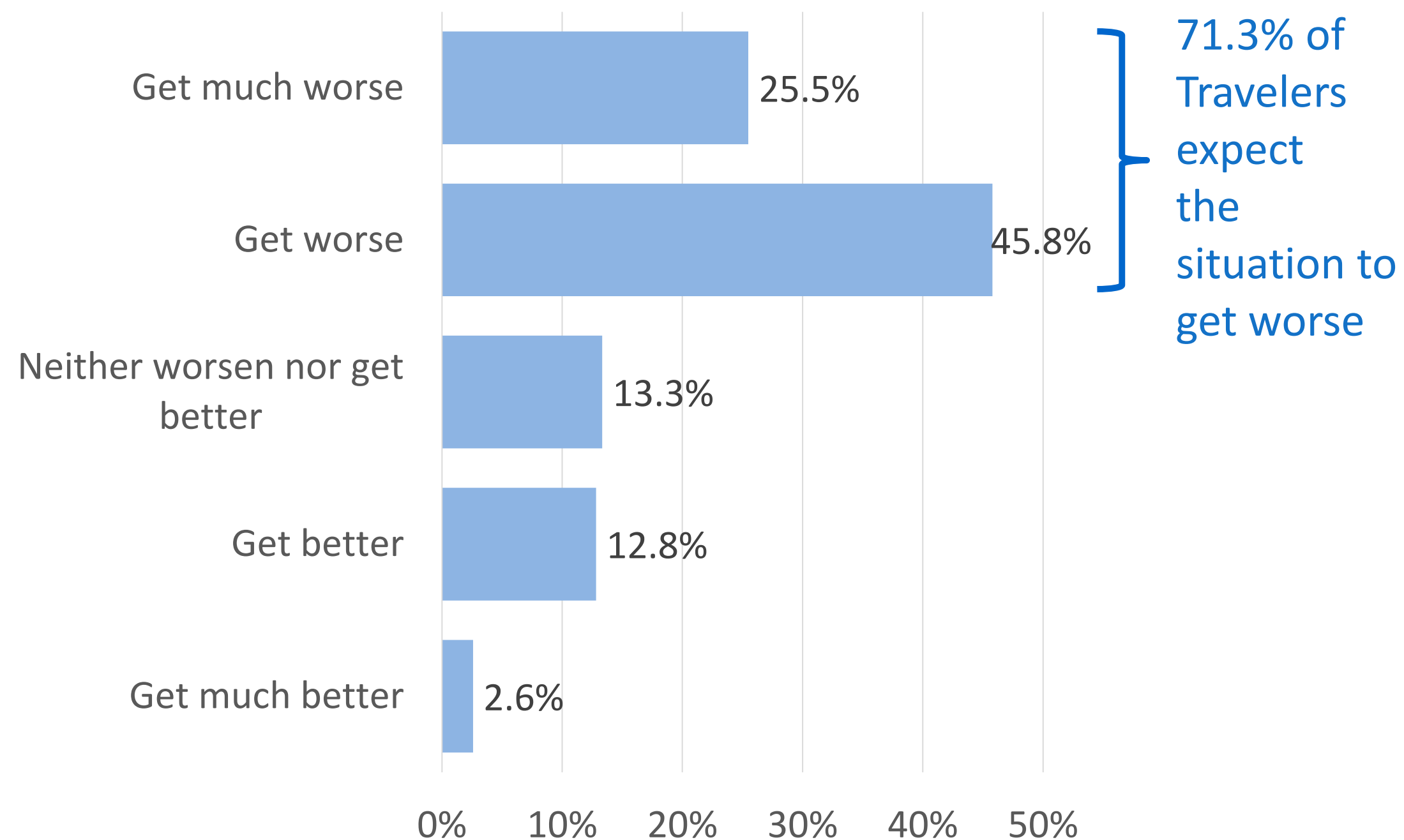


Section III:
Opinions on Travel
& the Coronavirus

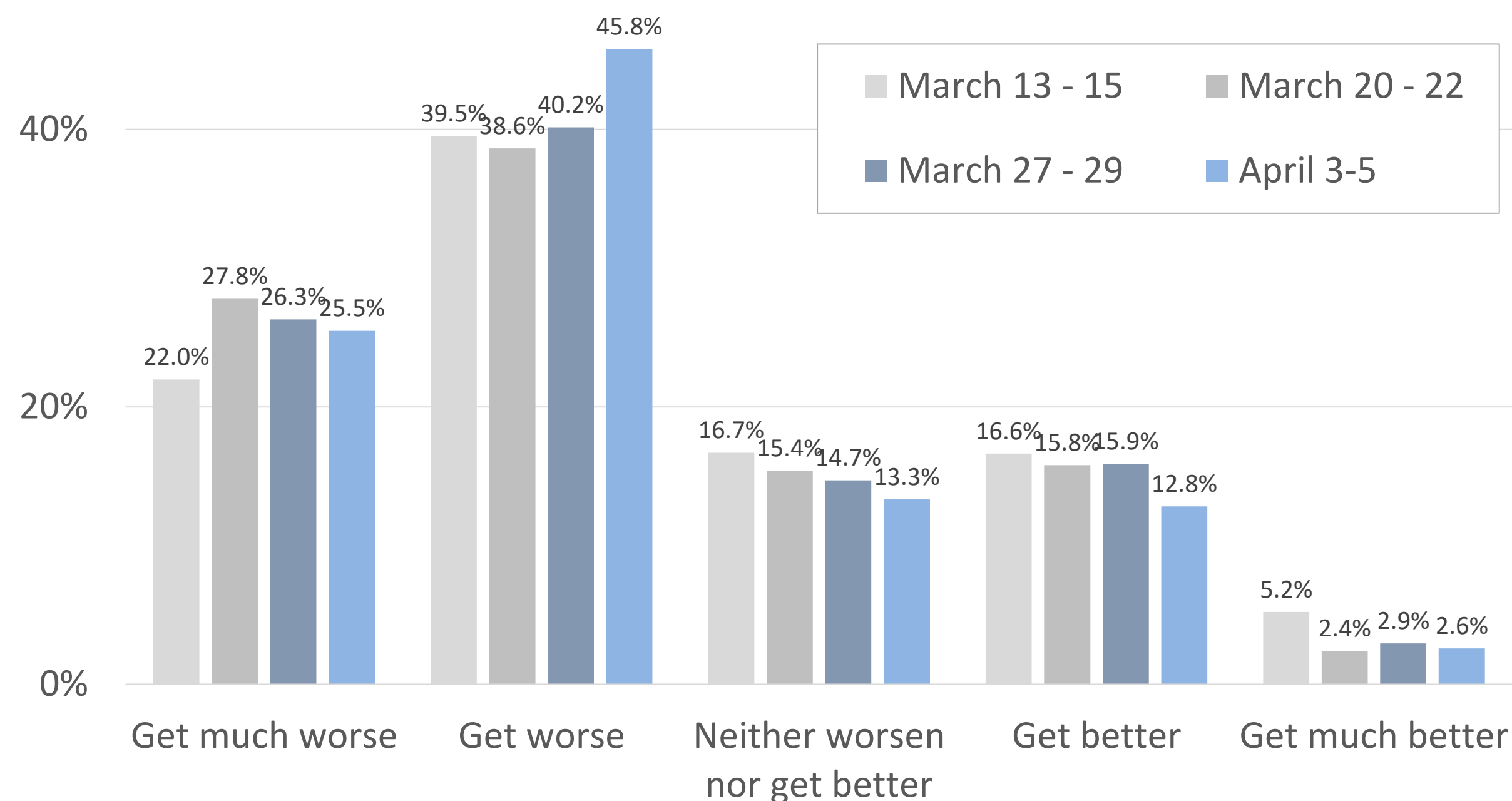
Expectations for Coronavirus Outbreak

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, more travelers feel the situation will get worse in the next month. 7-in-10 travelers (71.3%) expect the coronavirus situation to get worse in the next month, up from 66.5 percent last week.



(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

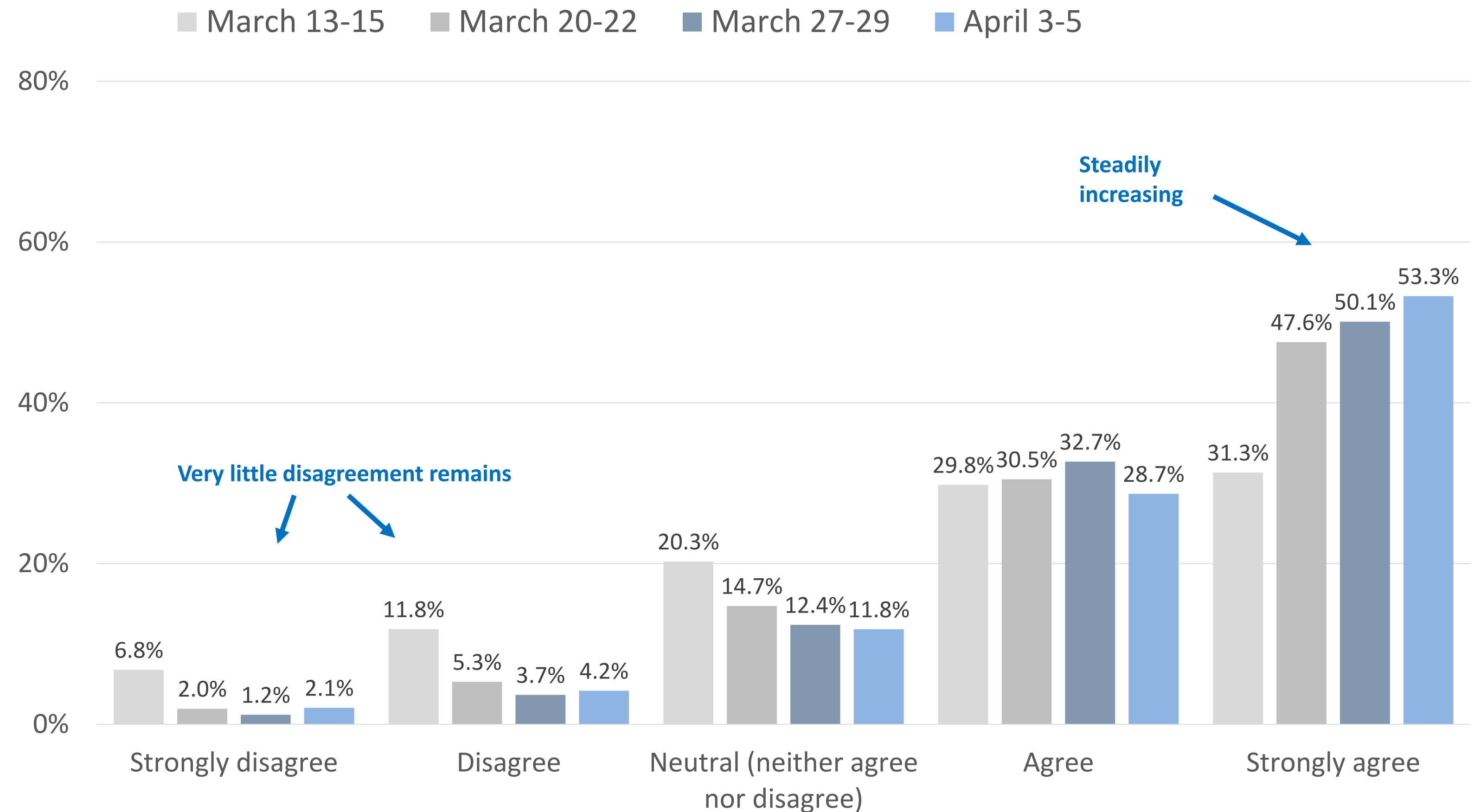
Avoiding Travel Until the Crisis Blows Over

Now, **81.9 percent** of American travelers say they are done traveling until the coronavirus situation blows over. More than half (53.3%) strongly agree with this sentiment.

How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the coronavirus situation blows over.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



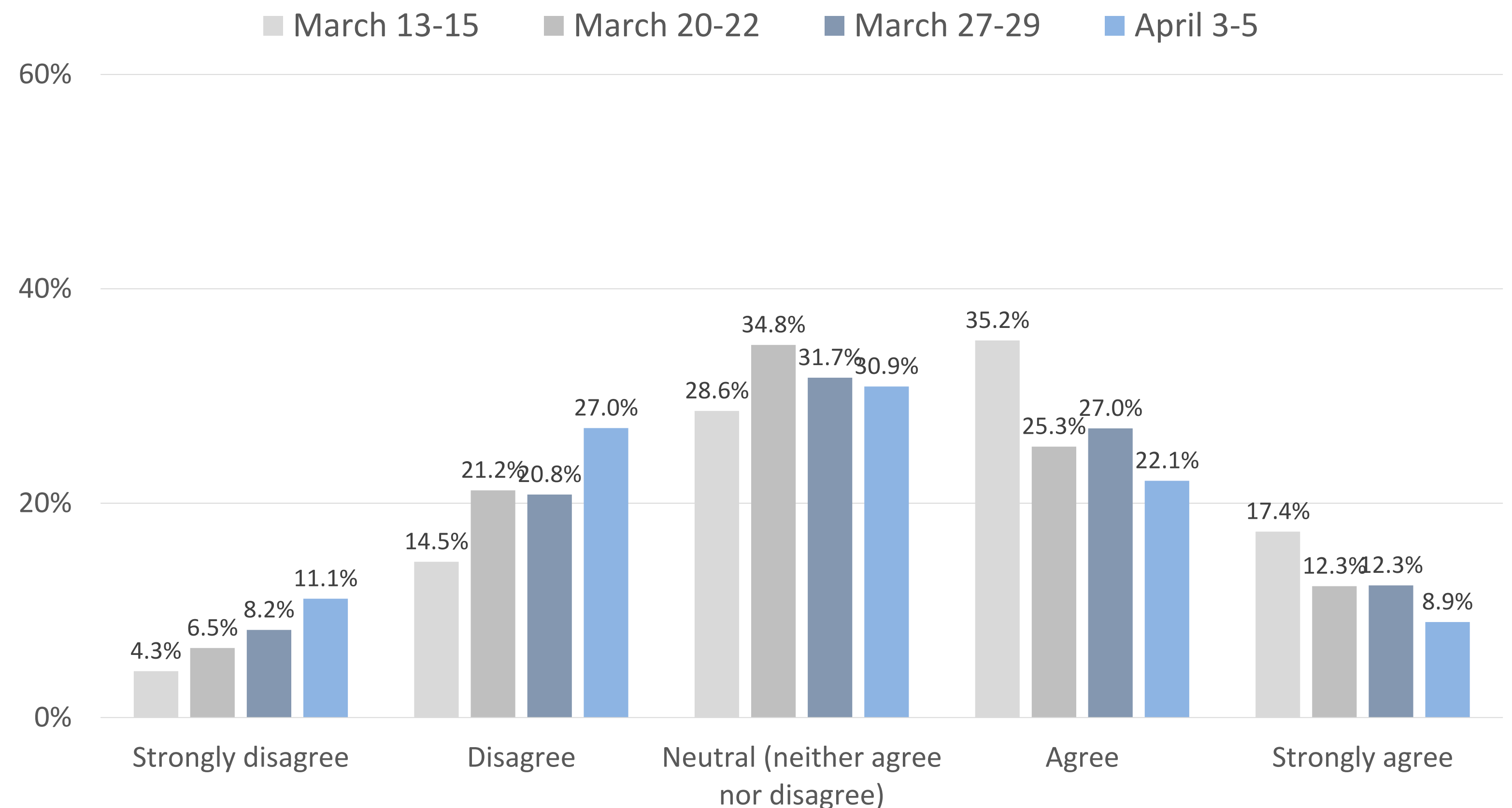
Expectations for Summer Travel Season

Last week 4-in-10 (39.3%) American travelers saw the coronavirus situation resolving itself before summer. **Agreement with this statement is down this week to just 3-in-10 (31.0%).**

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, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



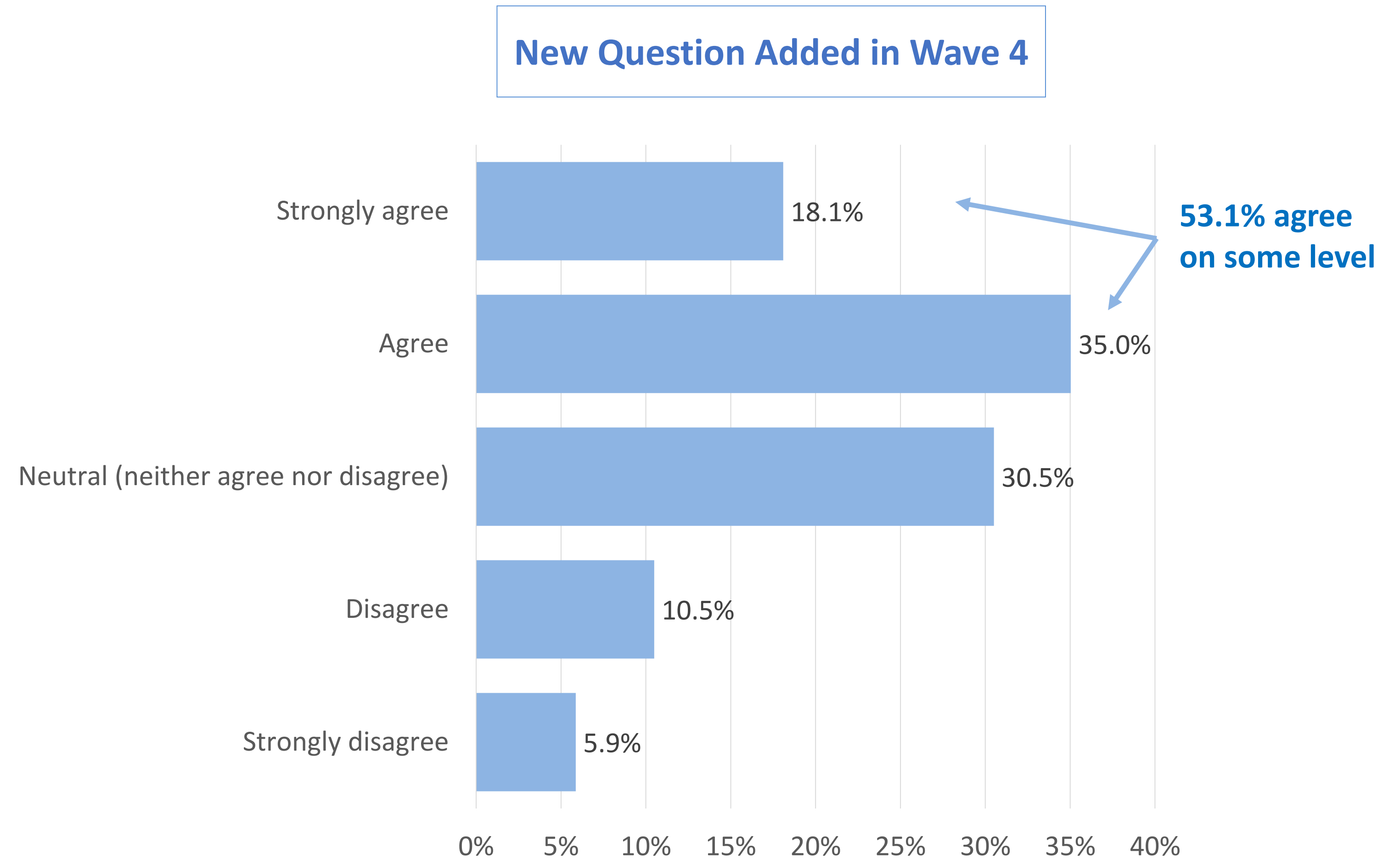
Expectations for Fall Travel Season

About one-half of American travelers (53.1%) expect to be back traveling this Fall. Only 16.4 percent disagree.

How much do you agree with the following statement?

Statement: I expect that I will be traveling in the Fall of 2020.

(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



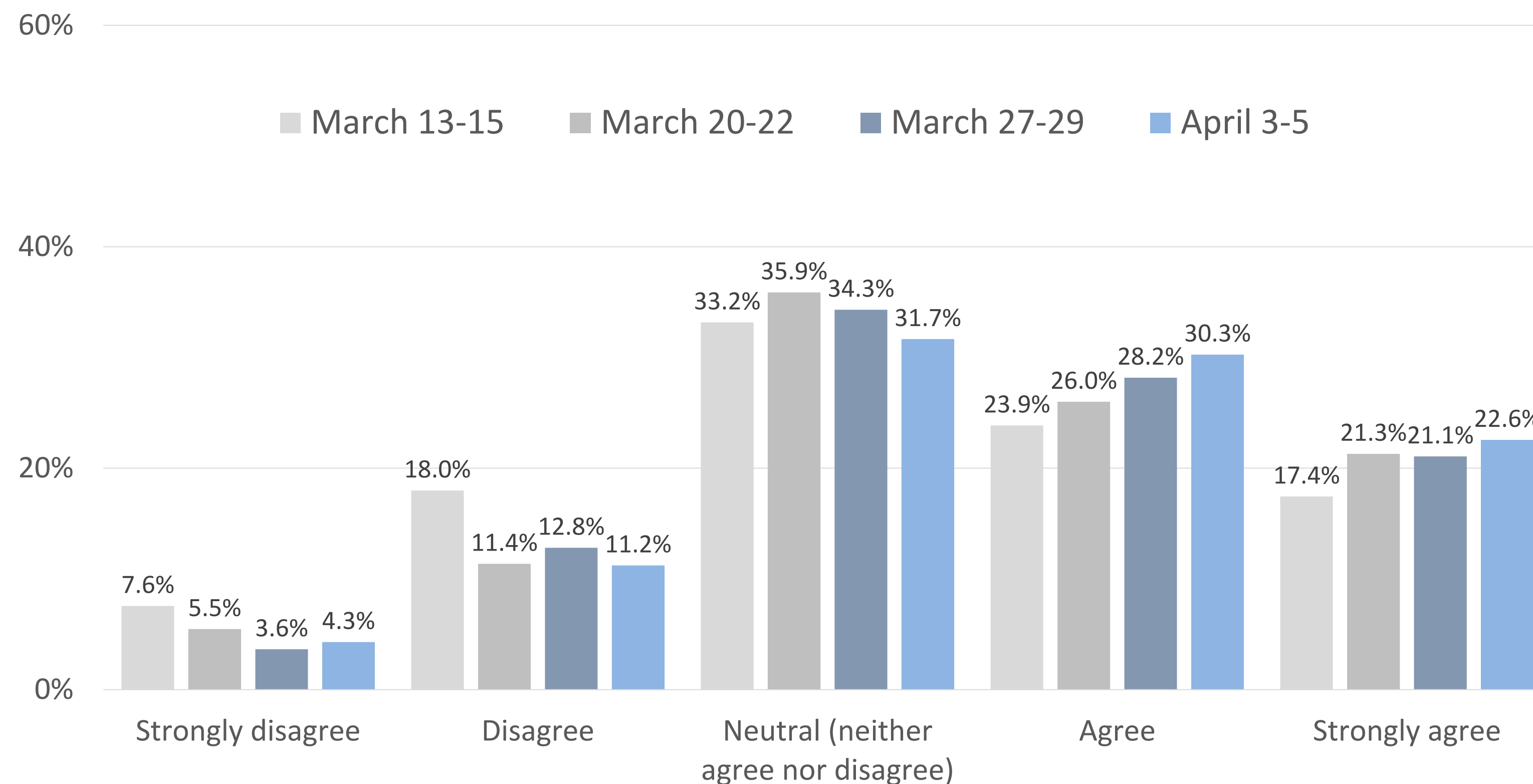
Staycations as a Replacement for Vacations

Over the course of the month, there has been increasing agreement that staycations may end up replacing vacations this summer. The percent of American travelers agreeing with this sentiment has grown from 41.3 percent in wave 1 to 52.8 percent in the most recent wave.

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



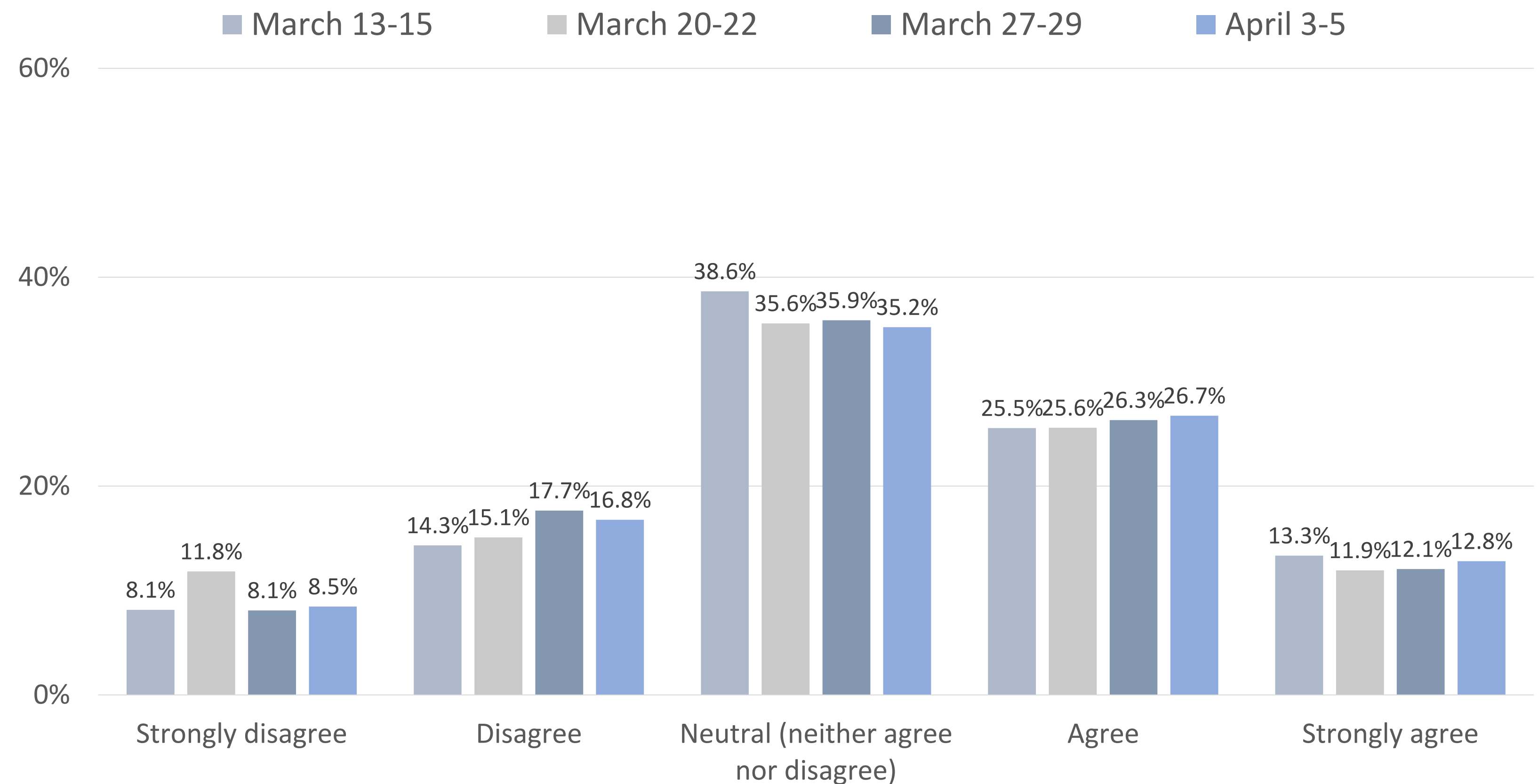
Replacing Air Travel With Road Trips

Car travel may displace some air travel this year, with 4-in-10 American travelers saying they may avoid airlines and instead travel by car. 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, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



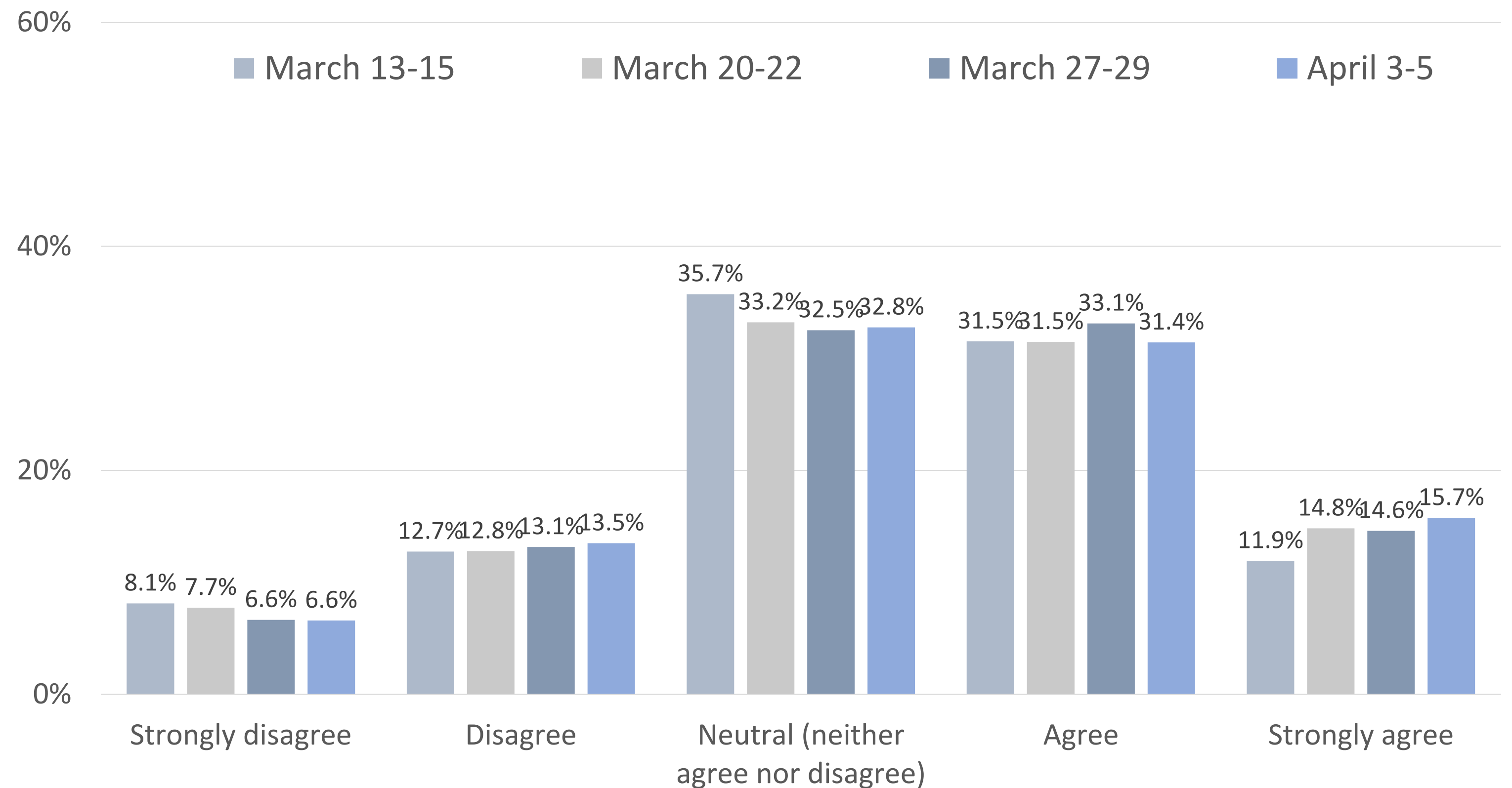
Replacing Long-Haul Travel with Regional Trips

Similarly, 47.2 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 four 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, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



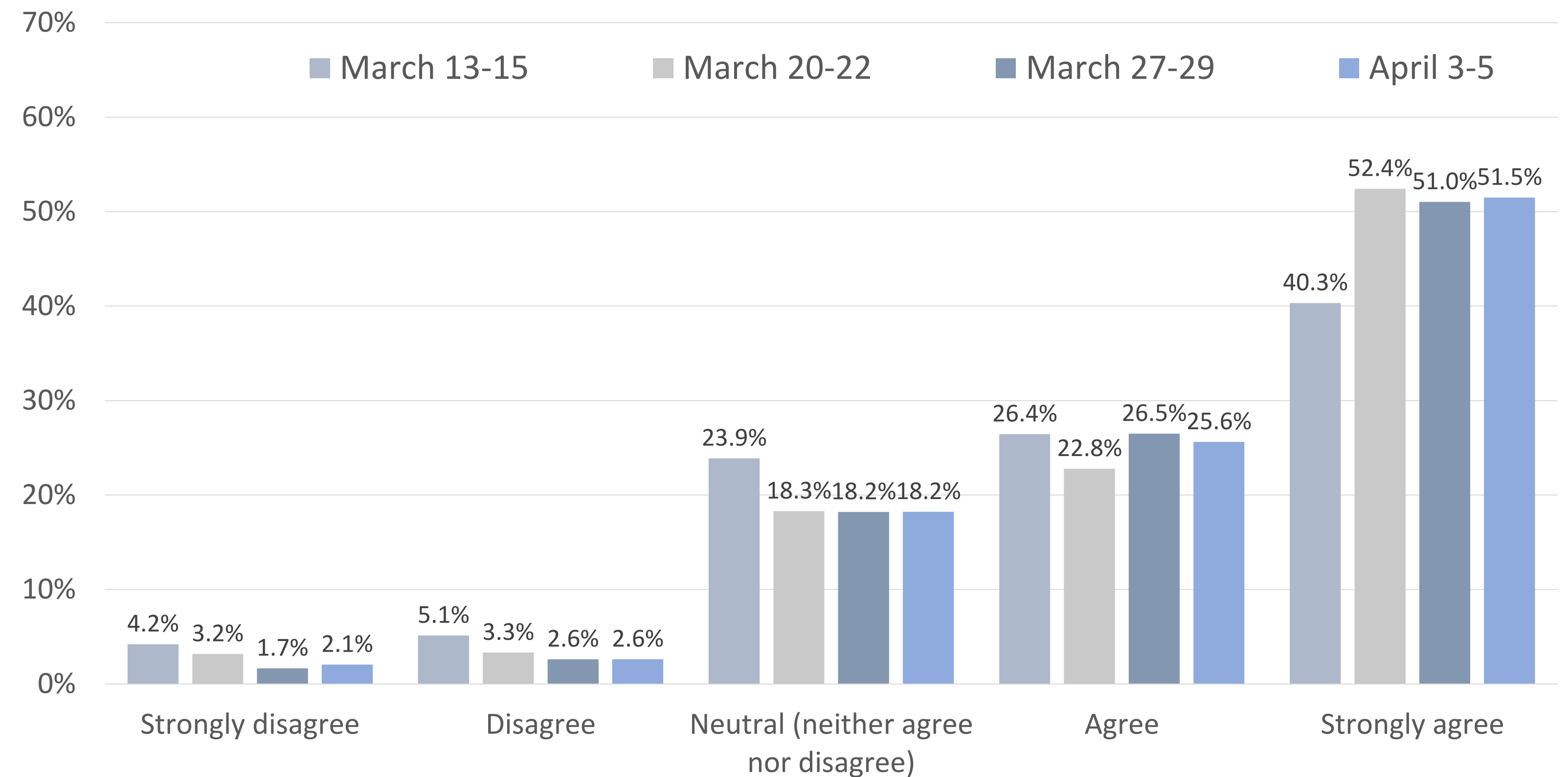
Avoiding Conventions & Conferences

Trust that attending meetings in the current environment is safe is still very low. Nearly 8-in-10 travelers (77.1%) 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, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



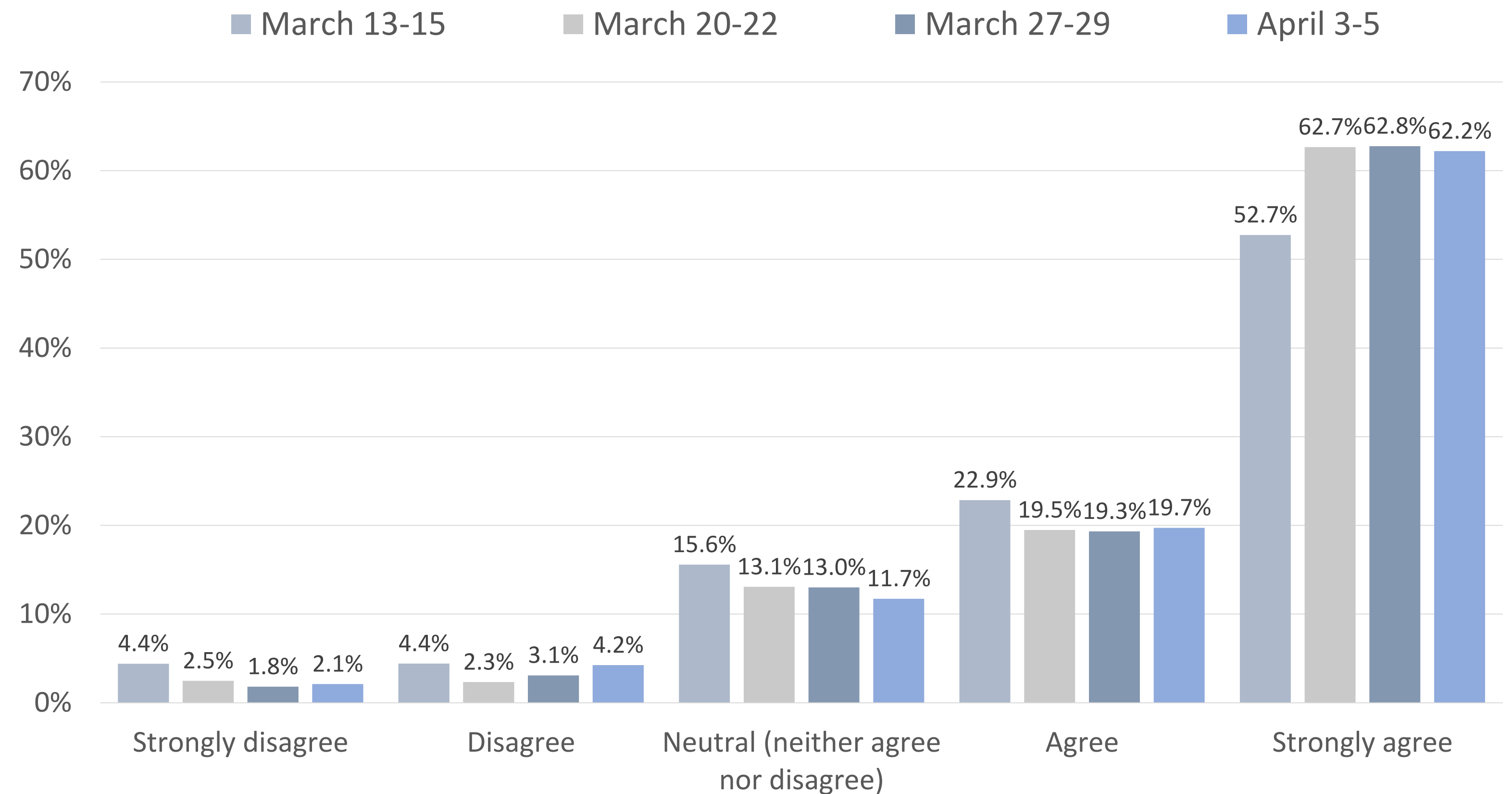
Avoiding International Travel

Unchanged from last week, 4-in-5 American travelers (81.9%) 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, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020))



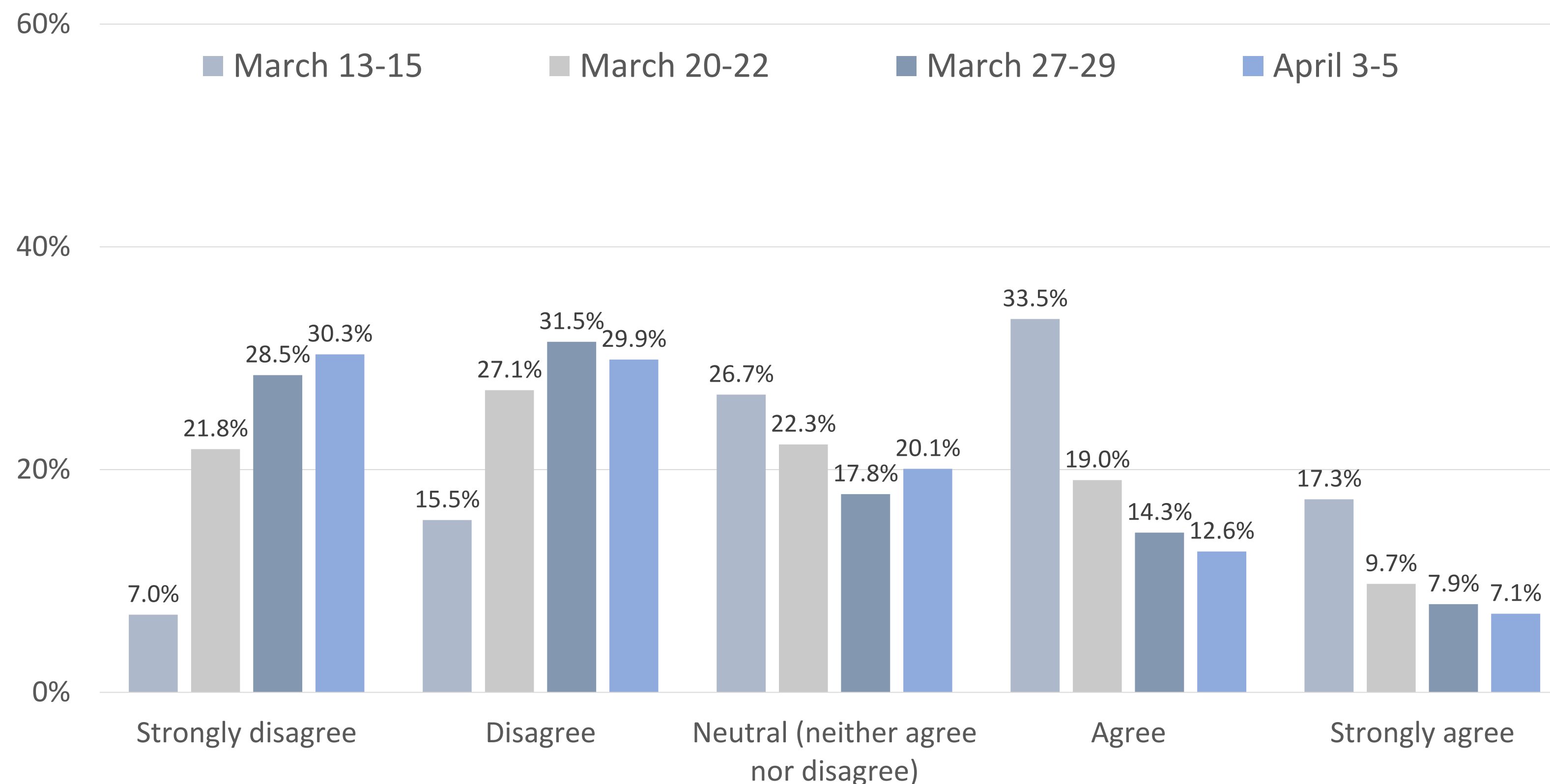
Comfort Enjoying Home Community

American travelers' comfort in going out in their own communities to enjoy themselves is nearly gone. This week, less than 1-in-5 (19.7%) Americans said they felt comfortable doing this.

How much do you agree with the following statement?

Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

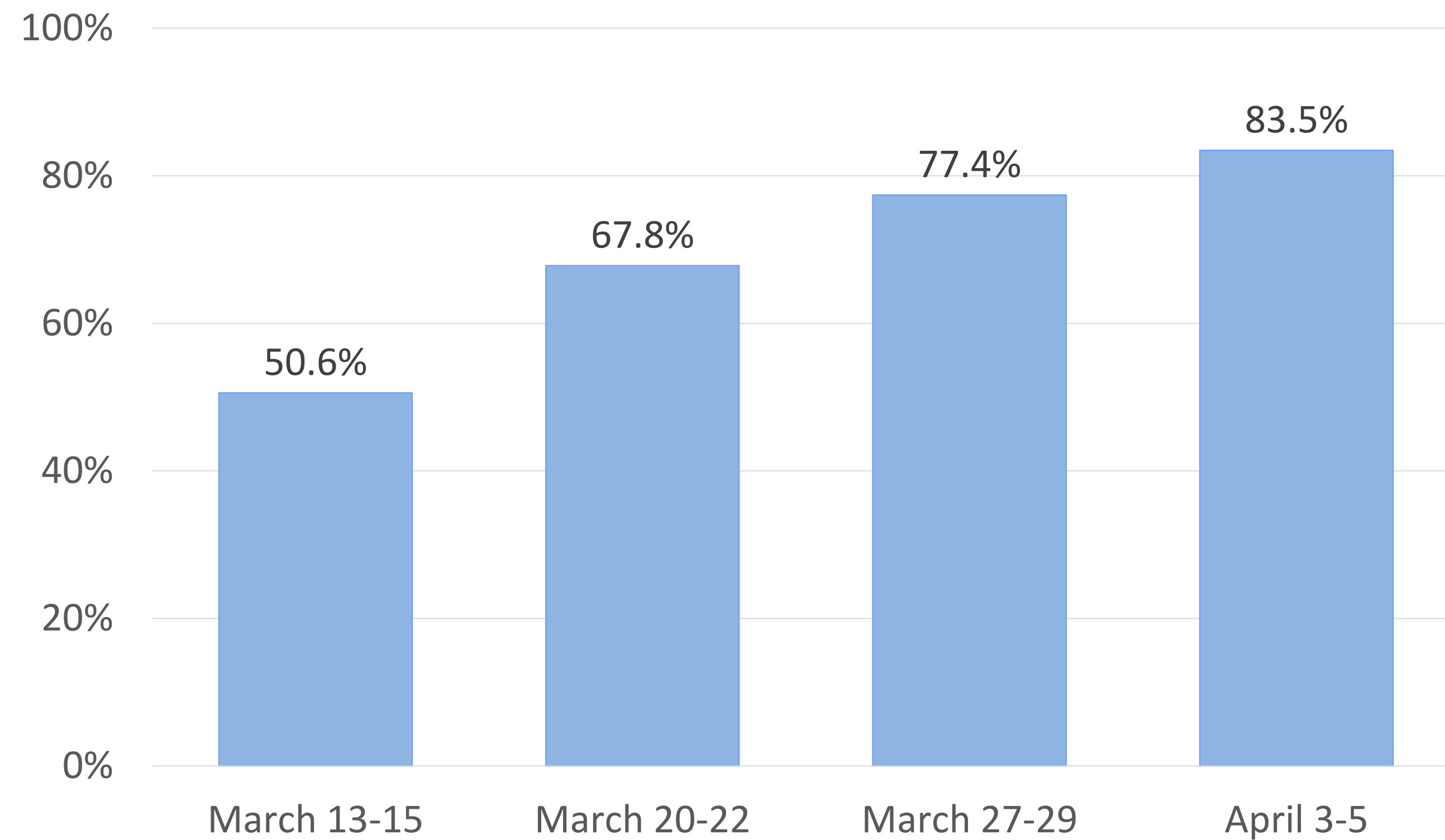


Lives in a Place with Reported Cases of Coronavirus

8-in-10 American travelers now report living in a community with known cases of the virus.

Question: Do you live in an area with reported cases of coronavirus?

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



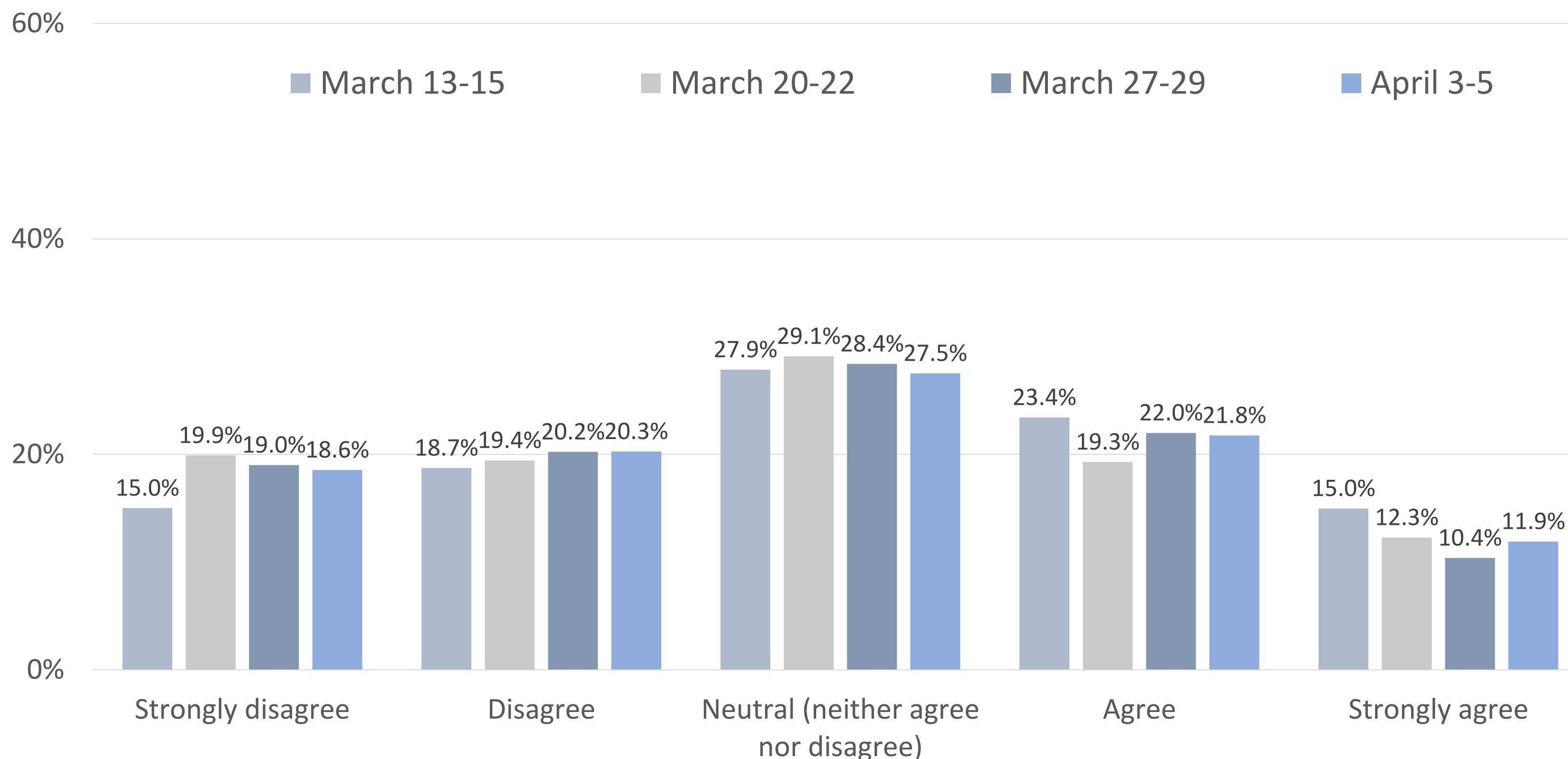
Discounts and Price Cuts

Price cuts resonate with approximately 1-in-3 American travelers. When asked if price cutting made traveling in the next three months more interesting, 33.7 percent now agree, virtually unchanged from last week (32.4%).

How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



Travel Shaming

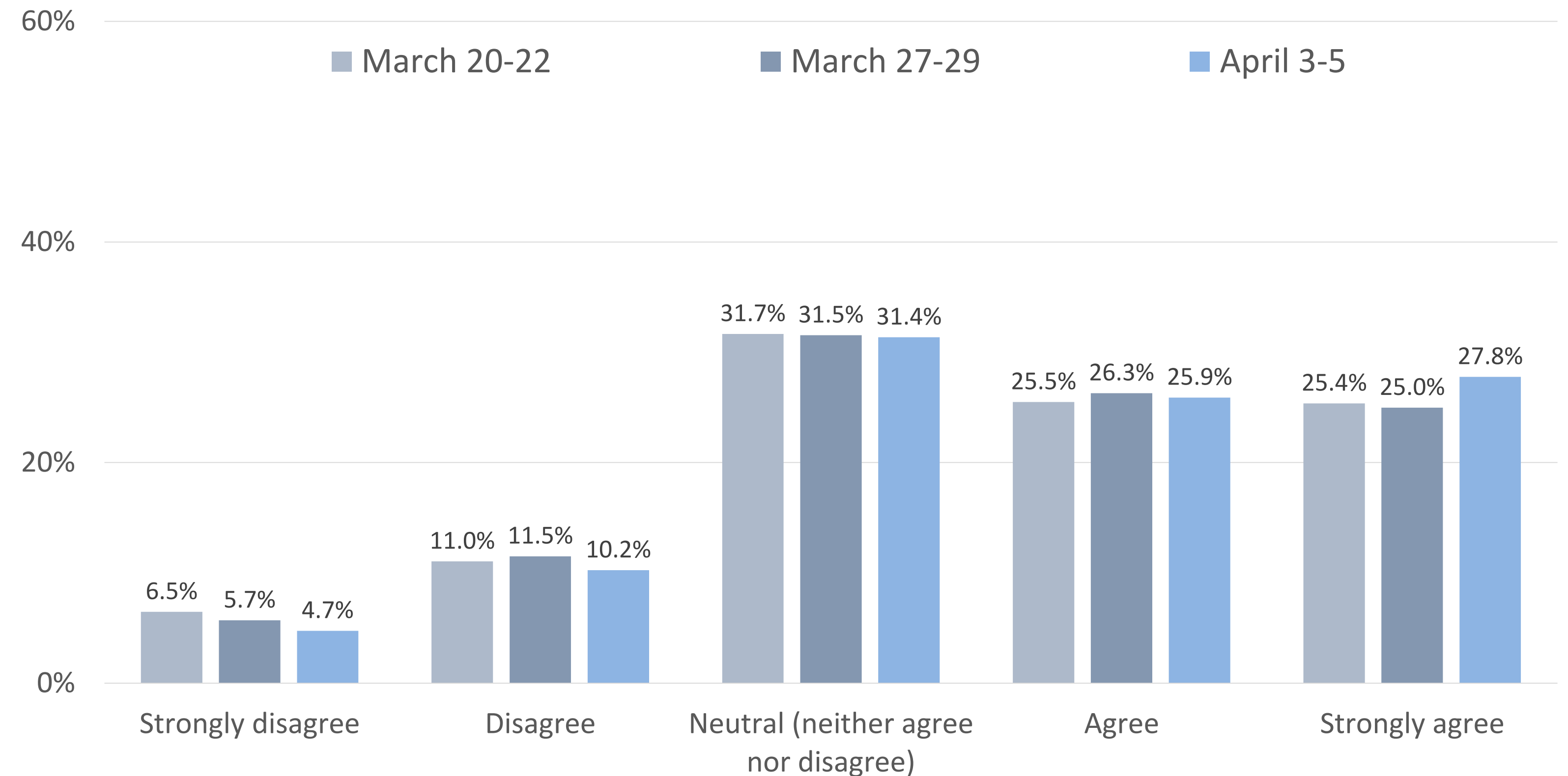
Half of Americans (53.7%) feel that persons traveling now should be ashamed of this behavior. Only 15.0 percent disagree.

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, 1,201 and 1,216 completed surveys. Data collected March 20-22, 27-29 and April 3-5, 2020)

New Question Added in Wave 2



Supporting Local Businesses

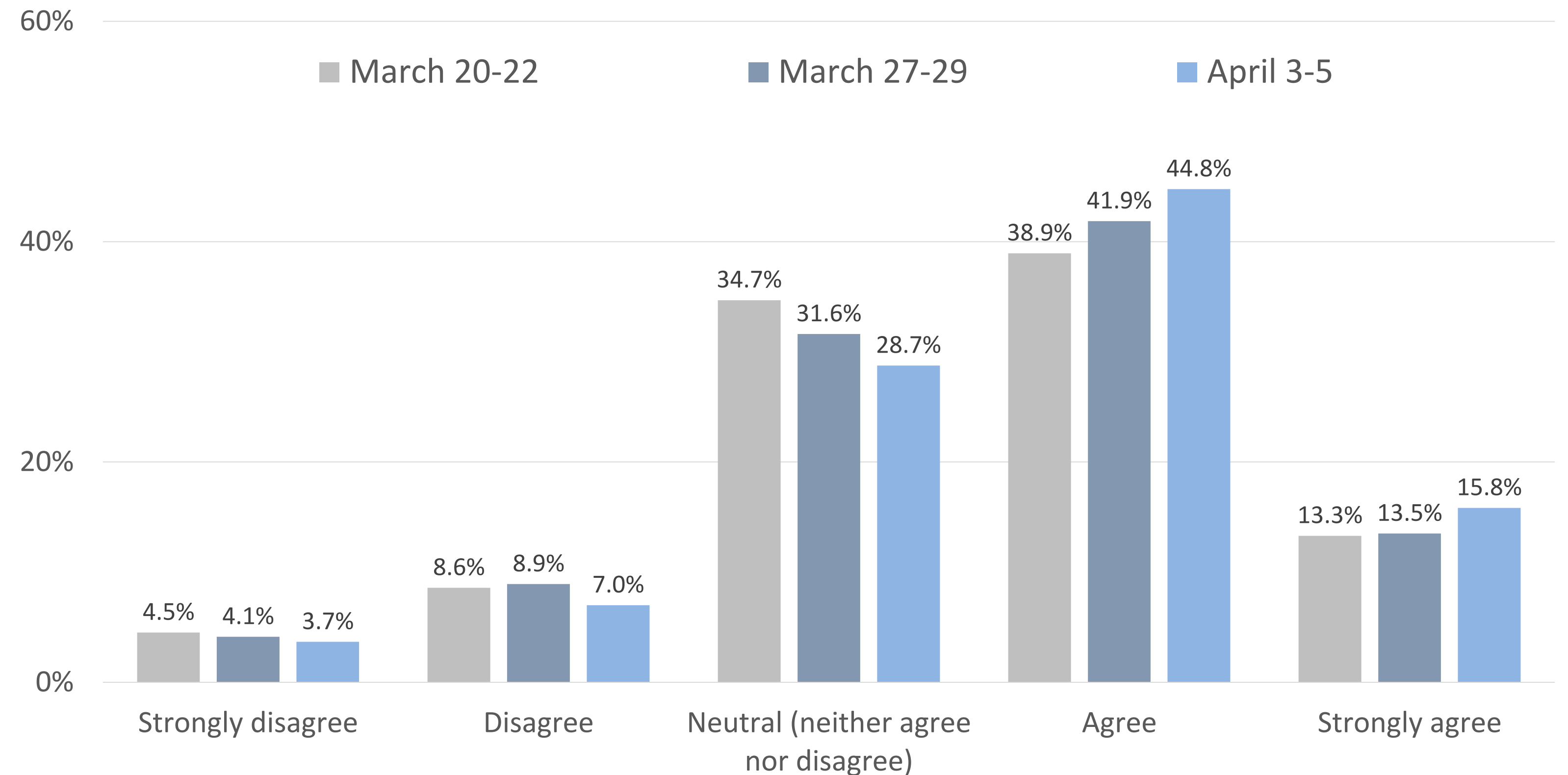
6-in-10 American travelers (60.6%) say they have been taking action to try to support local businesses where they live.

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, 1,201 and 1,216 completed surveys. Data collected March 20-22, 27-29 and April 3-5, 2020)

New Question Added in Wave 2



On Destinations Acting Quickly to Deal with Coronavirus

American travelers express some heightened interest (43.3%) in visiting places they perceive acted more quickly than others to deal with the coronavirus situation.

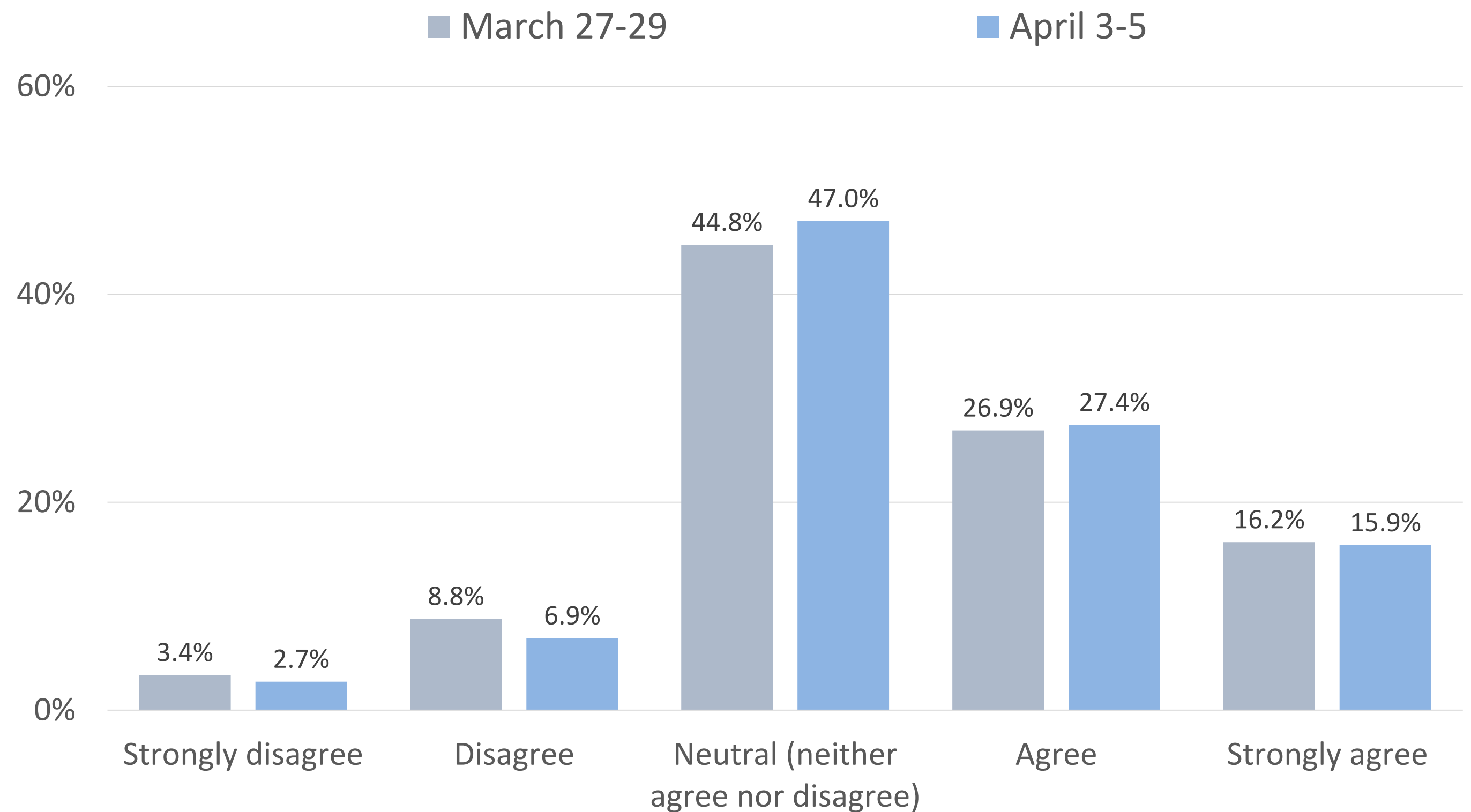
How much do you agree with the following statement?

Some U.S. states and destinations acted more rapidly than others in making preparations and putting in travel restrictions and shelter in place orders.

Statement: When the coronavirus situation is resolved, I'll be more likely to visit places that acted rapidly than those that acted more slowly.

(Base: All respondents, 1,201 and 1,216 completed surveys. Data collected March 27-29 and April 3-5, 2020)

New Question Added in Wave 3

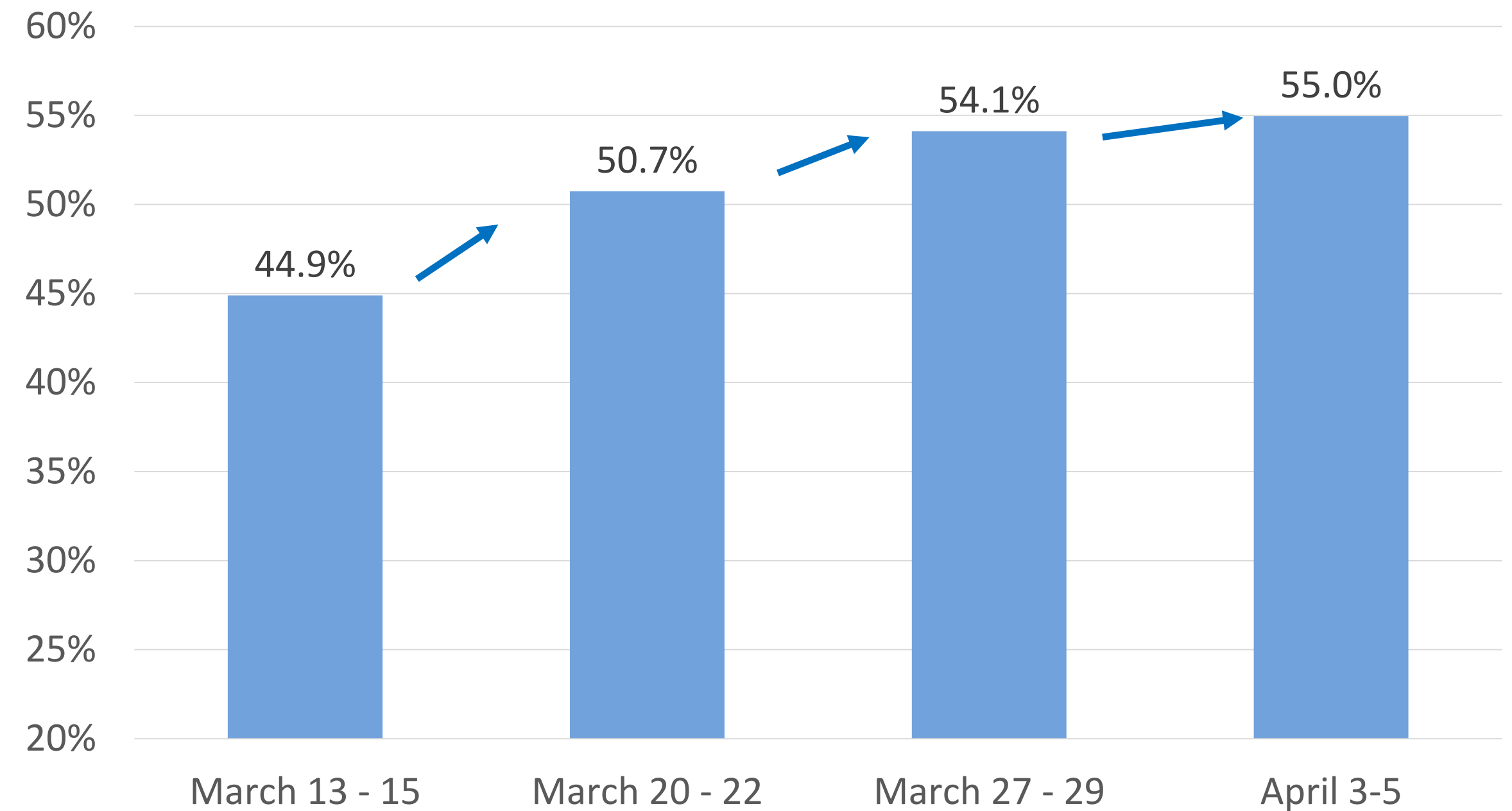
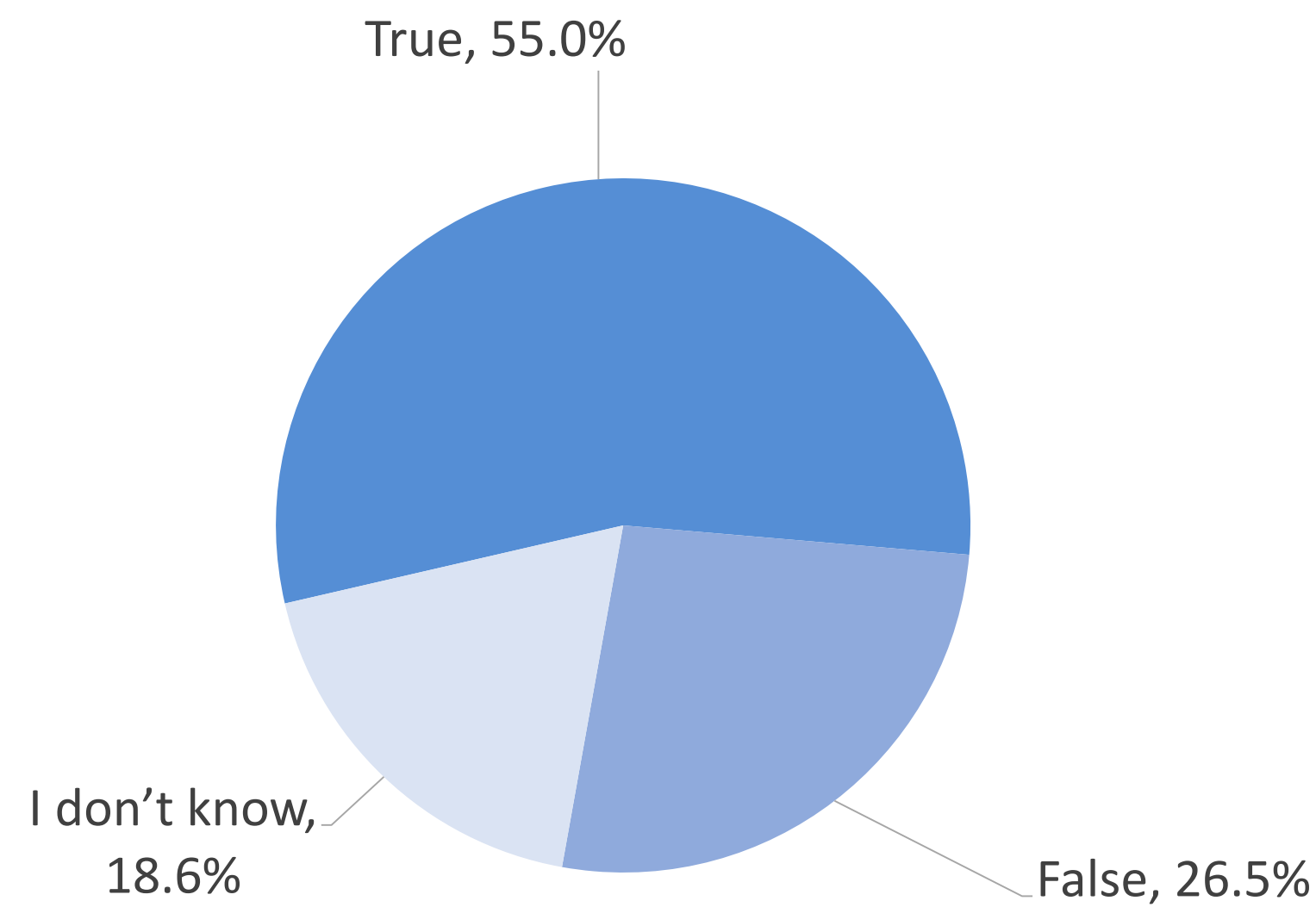


Business Travel Restrictions

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

Well over half of employed American travelers (55.0%) say their employer has put travel restrictions into effect, up from last week.

Wave 4 (April 3-5)

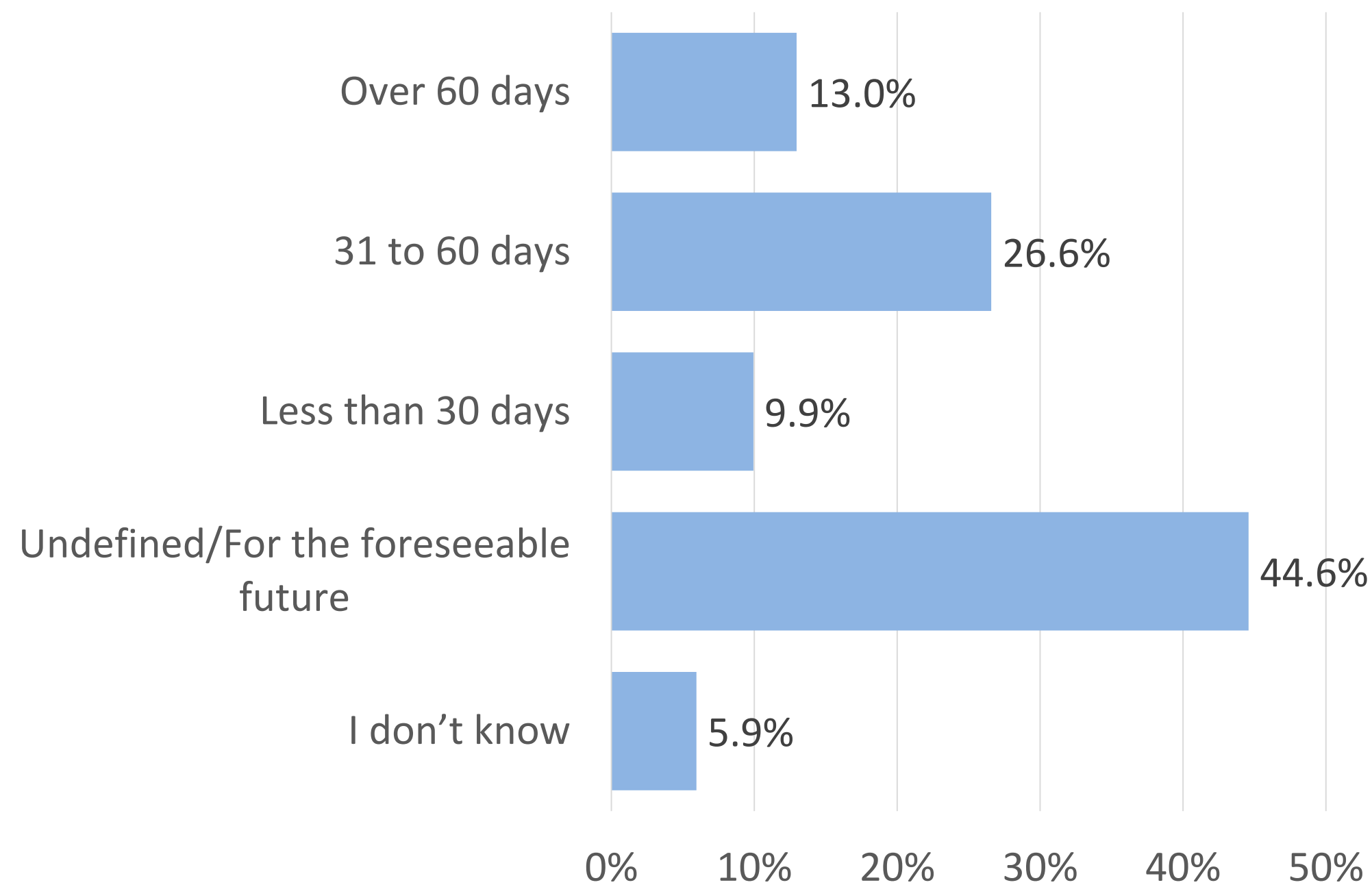


(Base: Employed respondents, 909, 916, 753 and 1,041 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

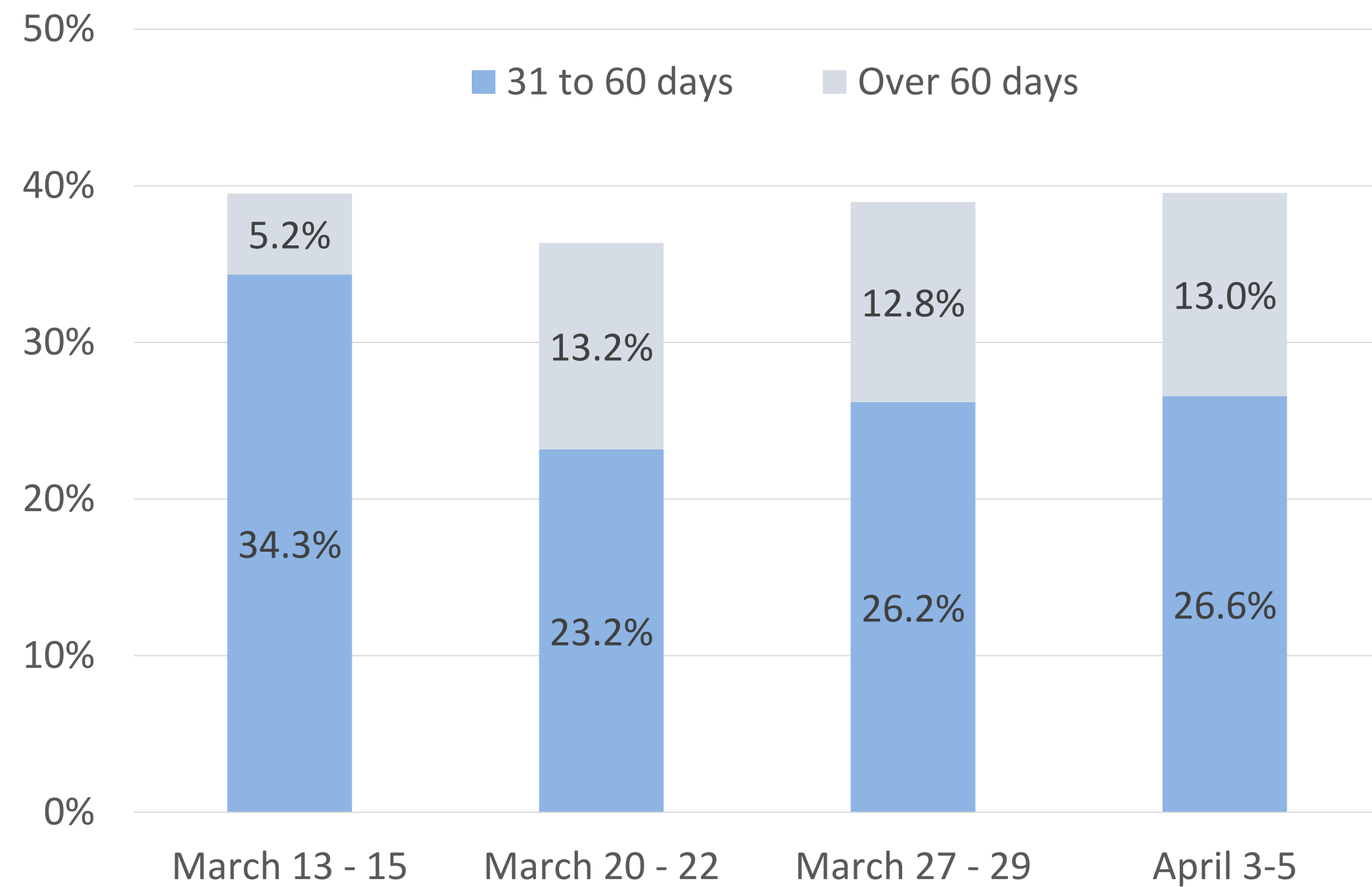
Business Travel Restrictions

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

Wave 4 (April 3-5)



Nearly 4-in-10 employed American travelers with employer-mandated travel restrictions (39.5%) say they will remain in place for at least one month.

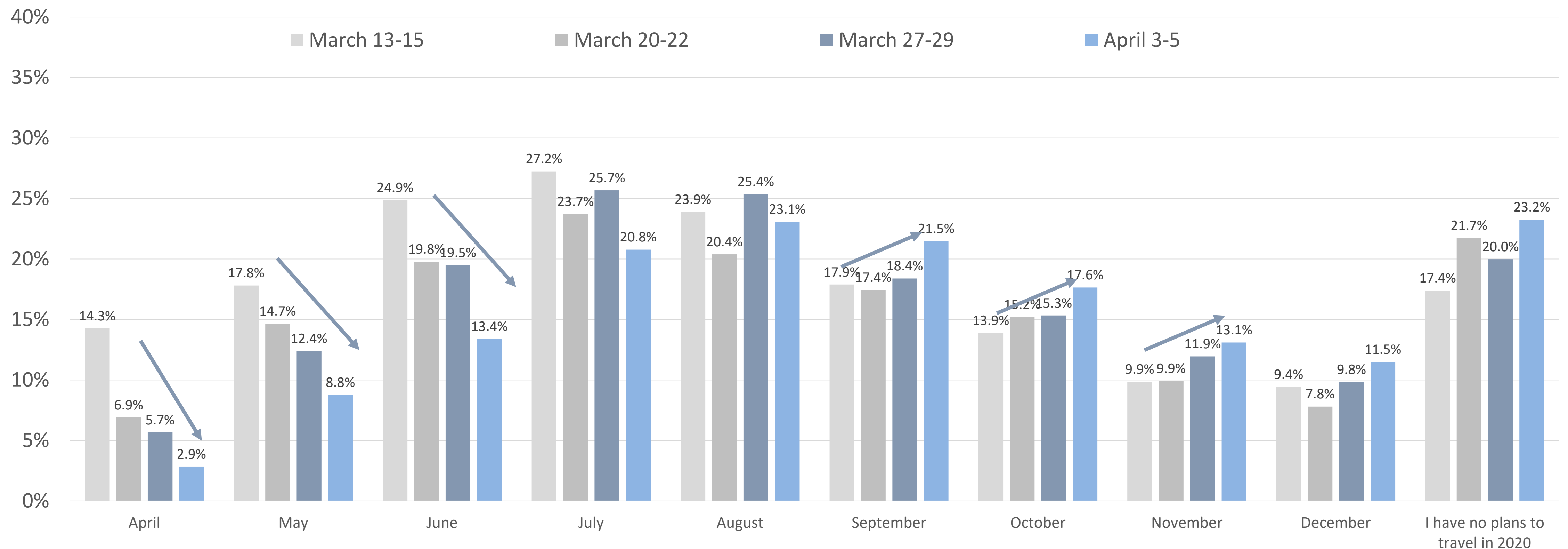


(Base: Employed respondents with travel restrictions, 488, 371, 488 and 581 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)

Upcoming Travel Plans

While the scheduling of leisure trips in the next three months has plummeted, there does appear to be some increases on the horizon for the Fall months.

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



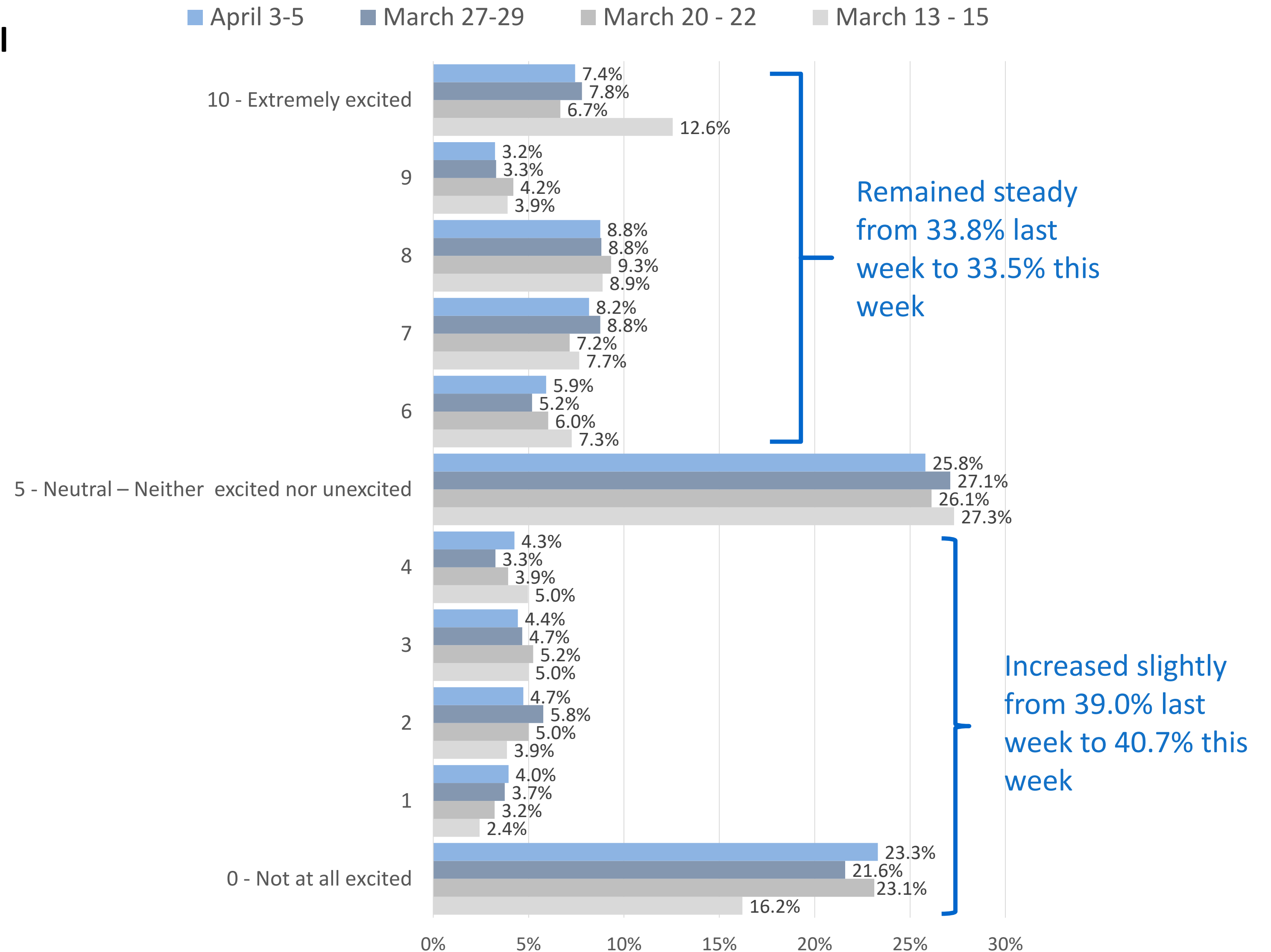
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

Openness to Travel Information

Travelers' interest in learning about new travel experiences and destinations has remained steady. This week, 4-in-10 (40.7%) expressed low levels of excitement about the 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, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



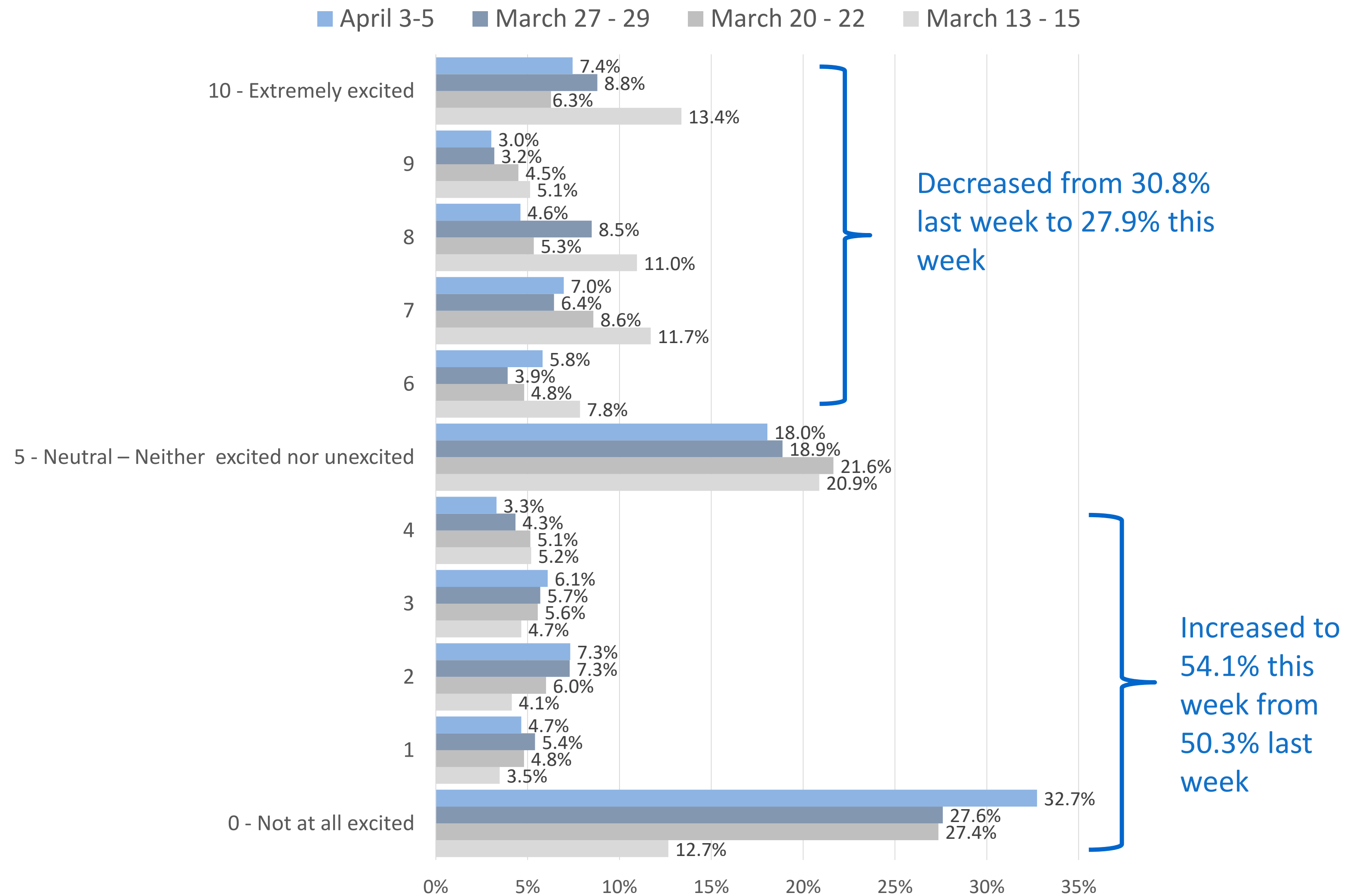
Excitement to Travel Now

Interest in even short trips continues to decline. About a third of American travelers (32.7%) 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—up from 27.6 percent last week.

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

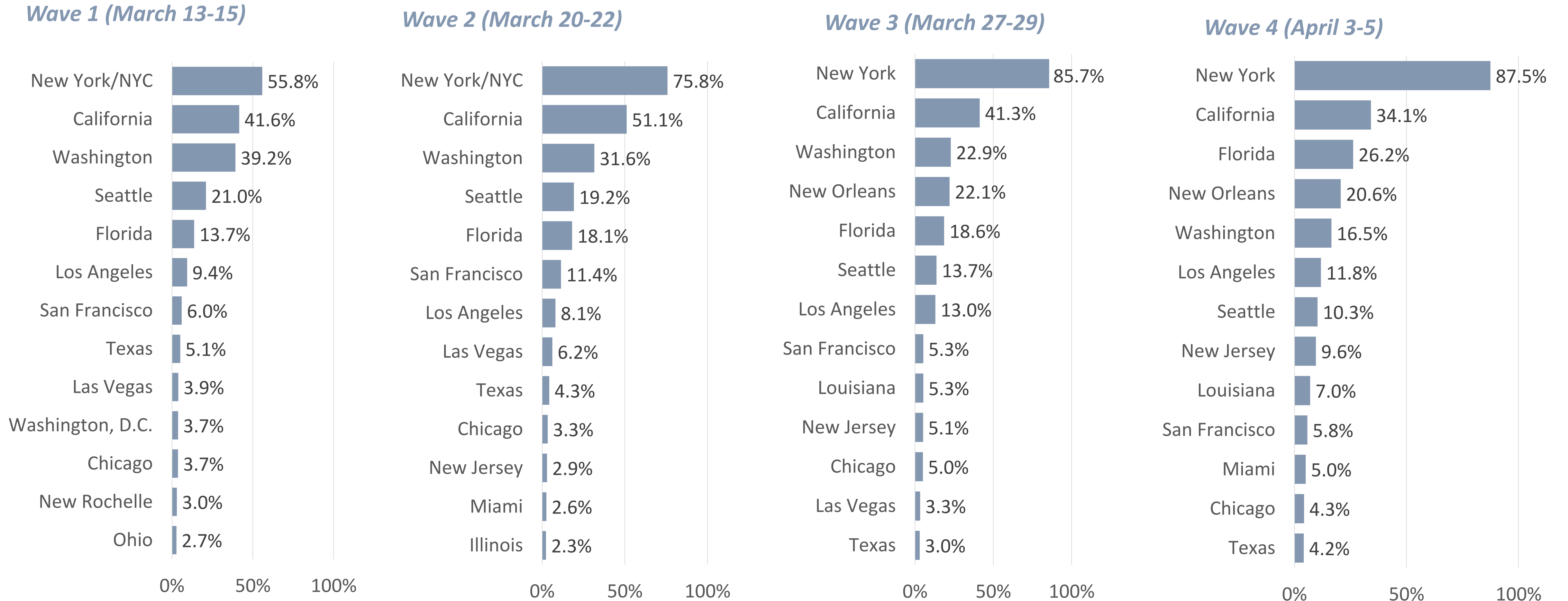
How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)



Most Talked About Coronavirus Hotspots

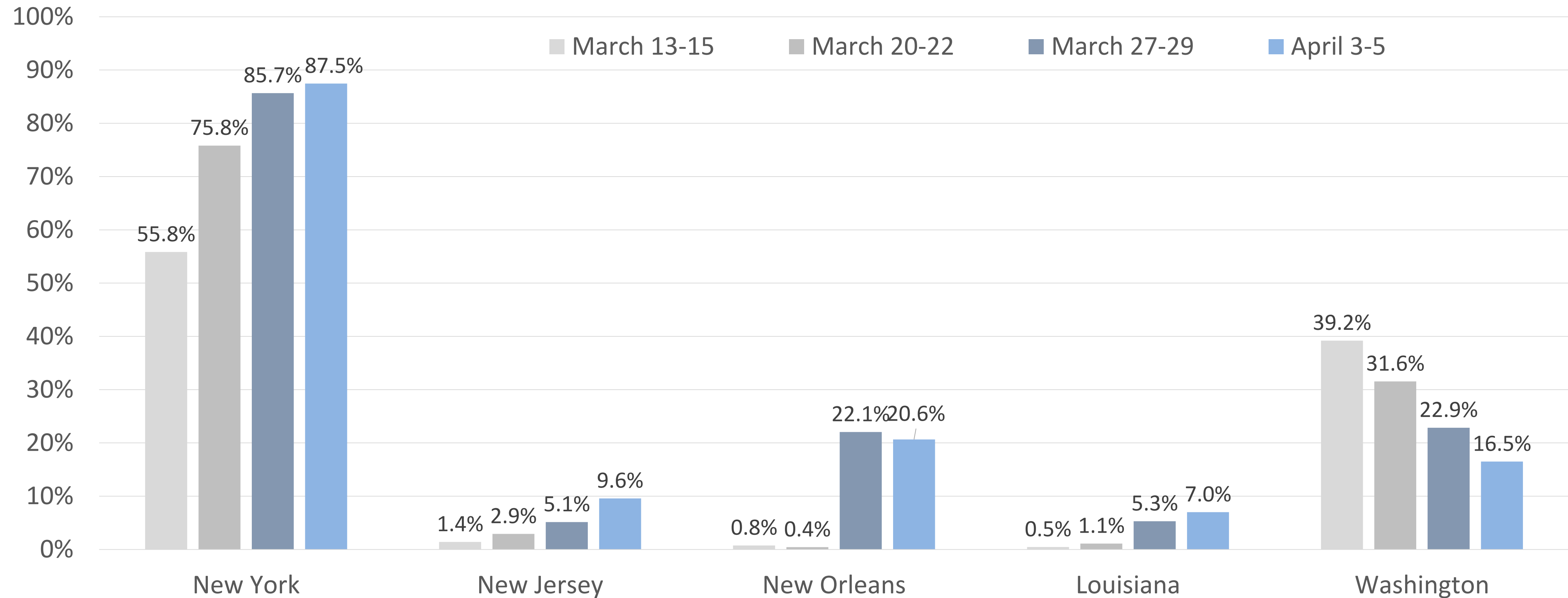
Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?



(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

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?



(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5)

Impact of Coronavirus on Destination Interest

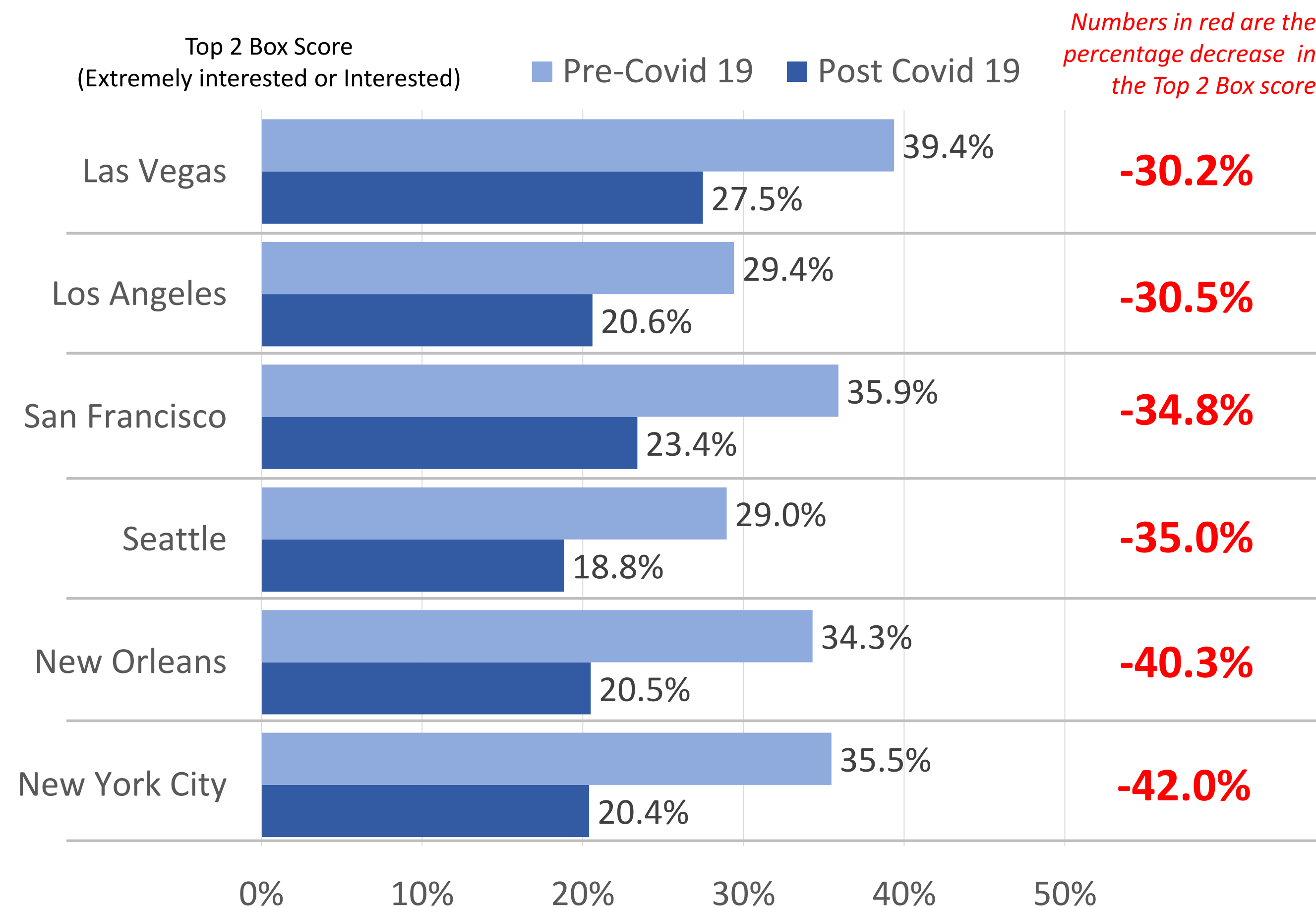
Long-term damage to a destination's brand caused by negative coronavirus publicity will be difficult to measure. At the moment, however, it appears those destinations struggling the most with the virus may have a steep hill to climb in the immediate aftermath of the crisis.

Question 1: Please think back to a few months ago -- **JUST PRIOR TO THE CORONAVIRUS SITUATION.**

At that time, how interested would you say you were in visiting each of these destinations sometime during 2020.

Question 2: Now please imagine the period of time immediately after the coronavirus situation blows over.

How interested will you likely be in visiting these destinations in the SIX (6) MONTHS immediately after the coronavirus situation blows over.



(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

Impact of Coronavirus on Destination Interest

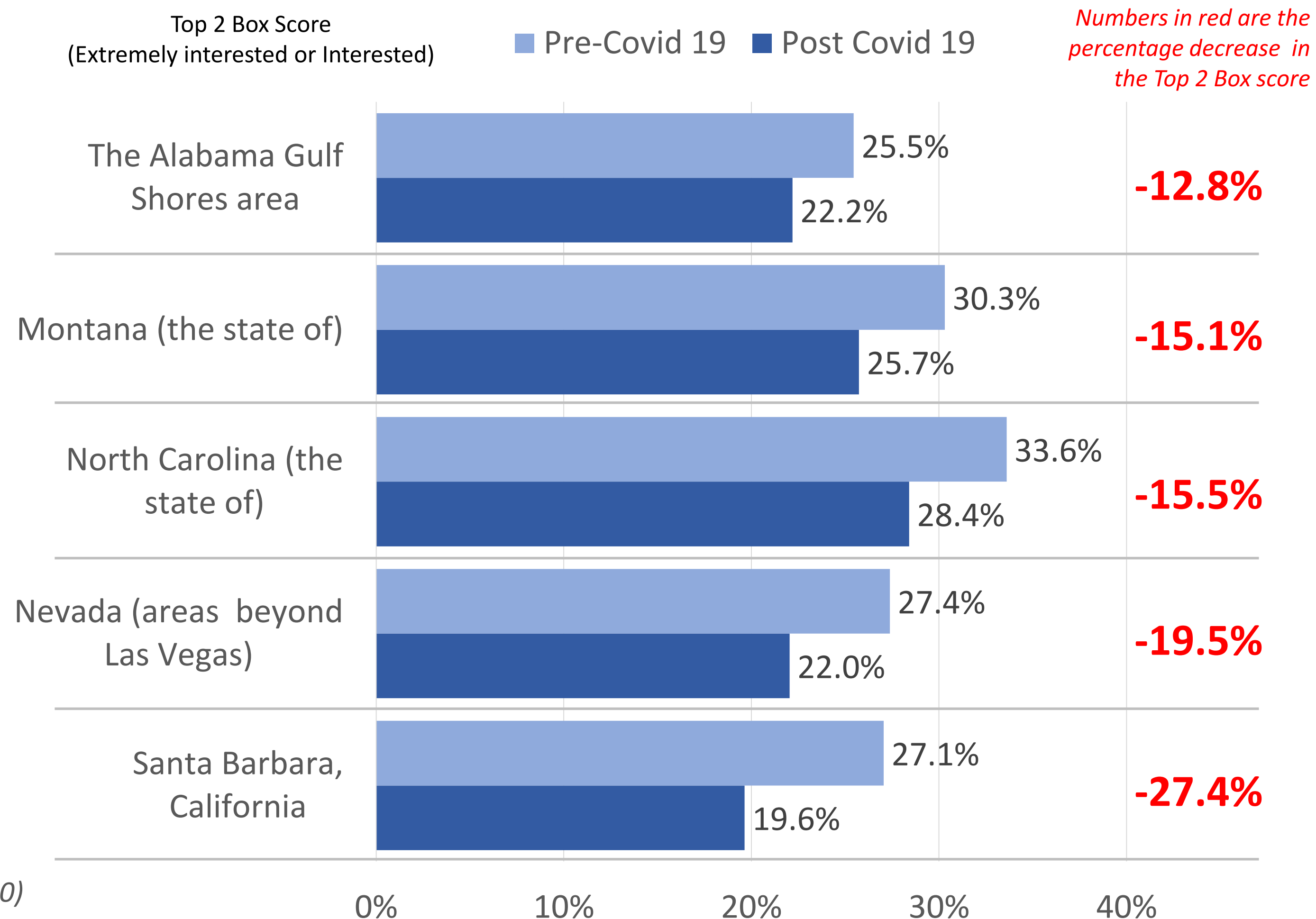
Several destinations with lesser levels of media attention were also tested, and the percent loss in interest in visiting in the immediate post-crisis period was markedly less.

Question 1: Please think back to a few months ago -- JUST PRIOR TO THE CORONAVIRUS SITUATION.

At that time, how interested would you say you were in visiting each of these destinations sometime during 2020.

Question 2: Now please imagine the period of time immediately after the coronavirus situation blows over.

How interested will you likely be in visiting these destinations in the SIX (6) MONTHS immediately after the coronavirus situation blows over.



(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

Changes in Travel after the Coronavirus Crisis

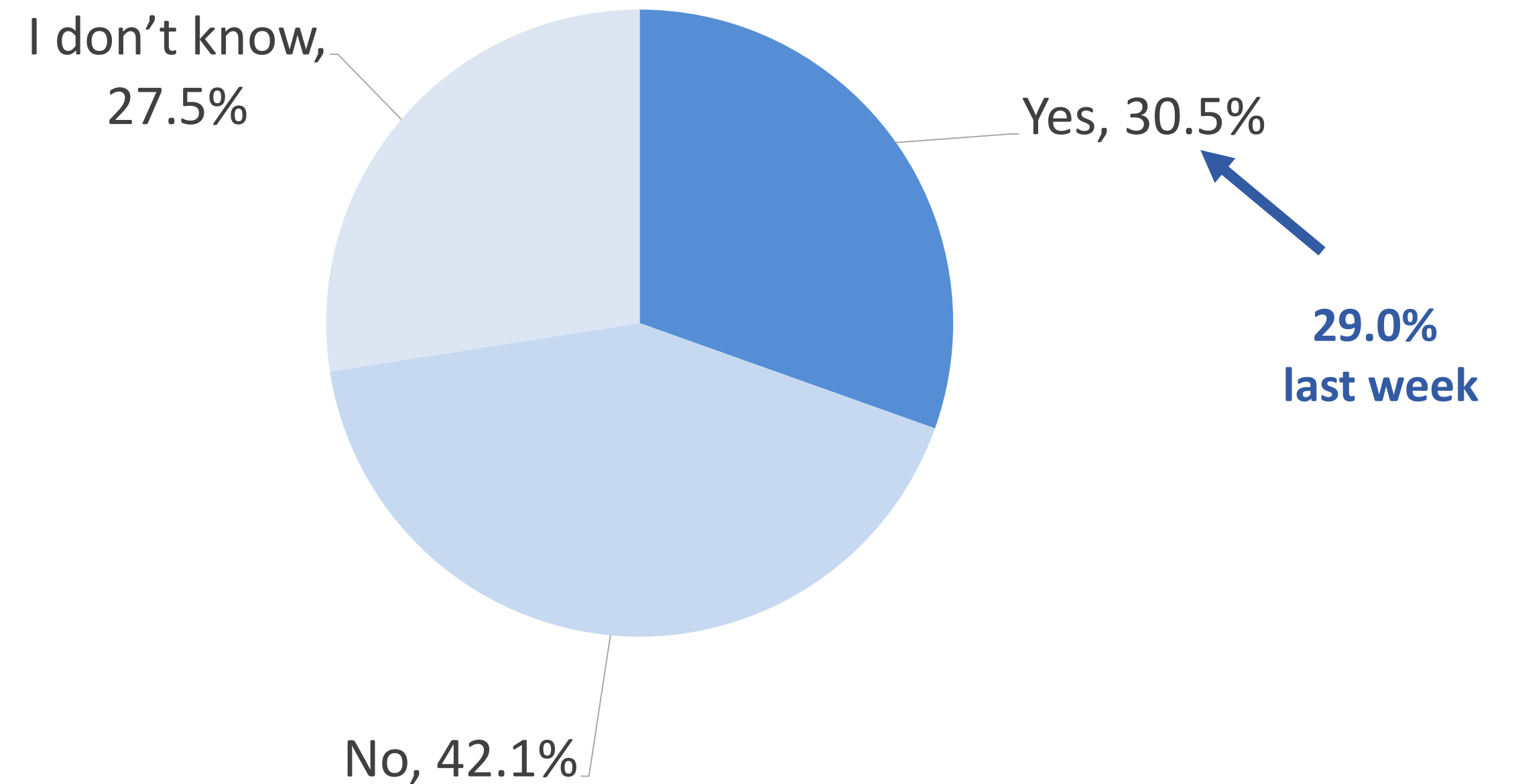
Less than one-third of American travelers say they expect to change the types of travel destinations they choose to visit after the coronavirus situation blows over.

Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit?

(Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

New Question Added in Wave 3



Changes in Travel after the Coronavirus Crisis: Aided

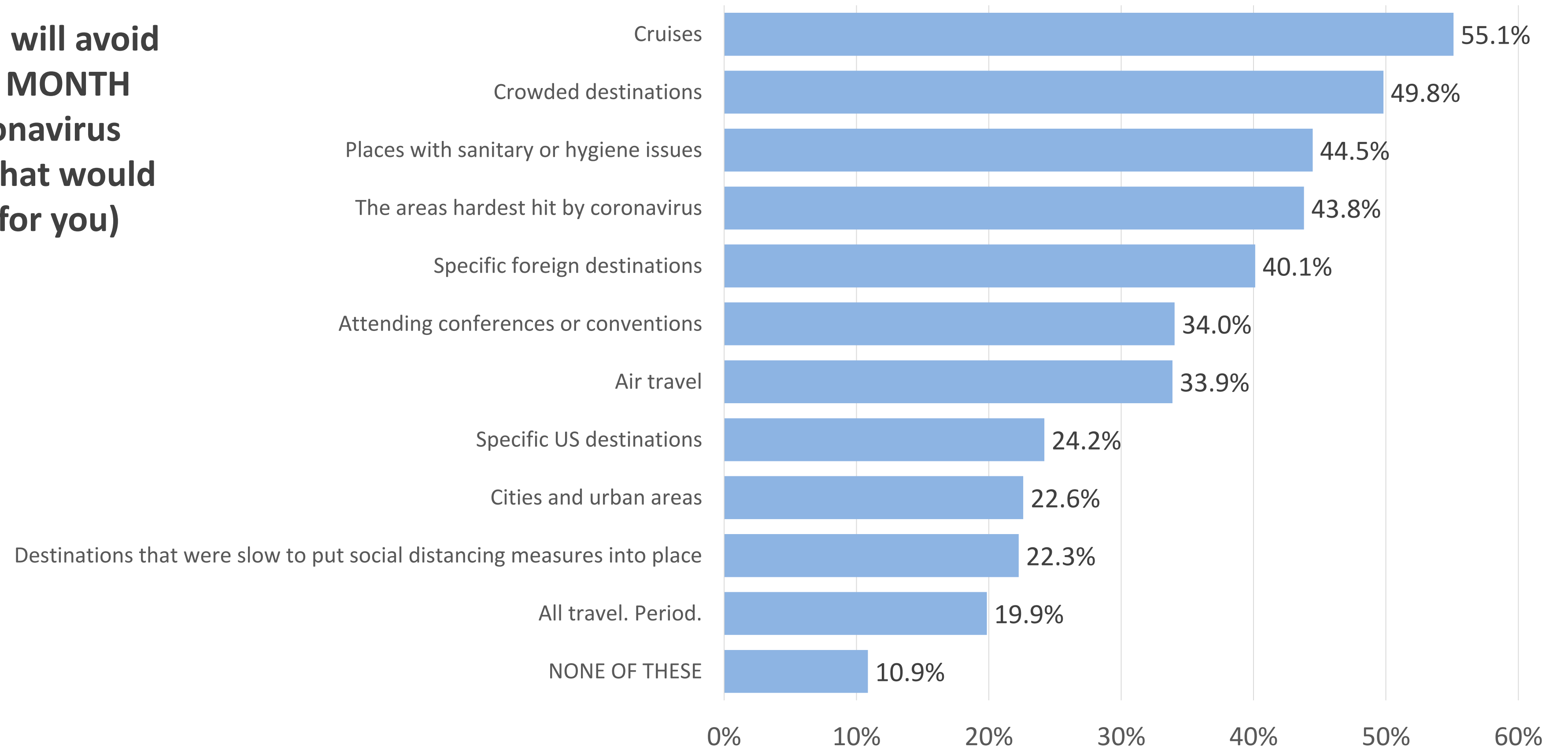
However, when asked specific travel behaviors they will likely avoid after the crisis is over, more than half said they would avoid cruises (55.1%), and nearly half (49.8%) said they would avoid crowded destinations.

Question: Do you expect that you will avoid any of the following in the SIX (6) MONTH period immediately after the coronavirus situation is resolved? (Select all that would complete the following sentence for you)

I will most likely avoid

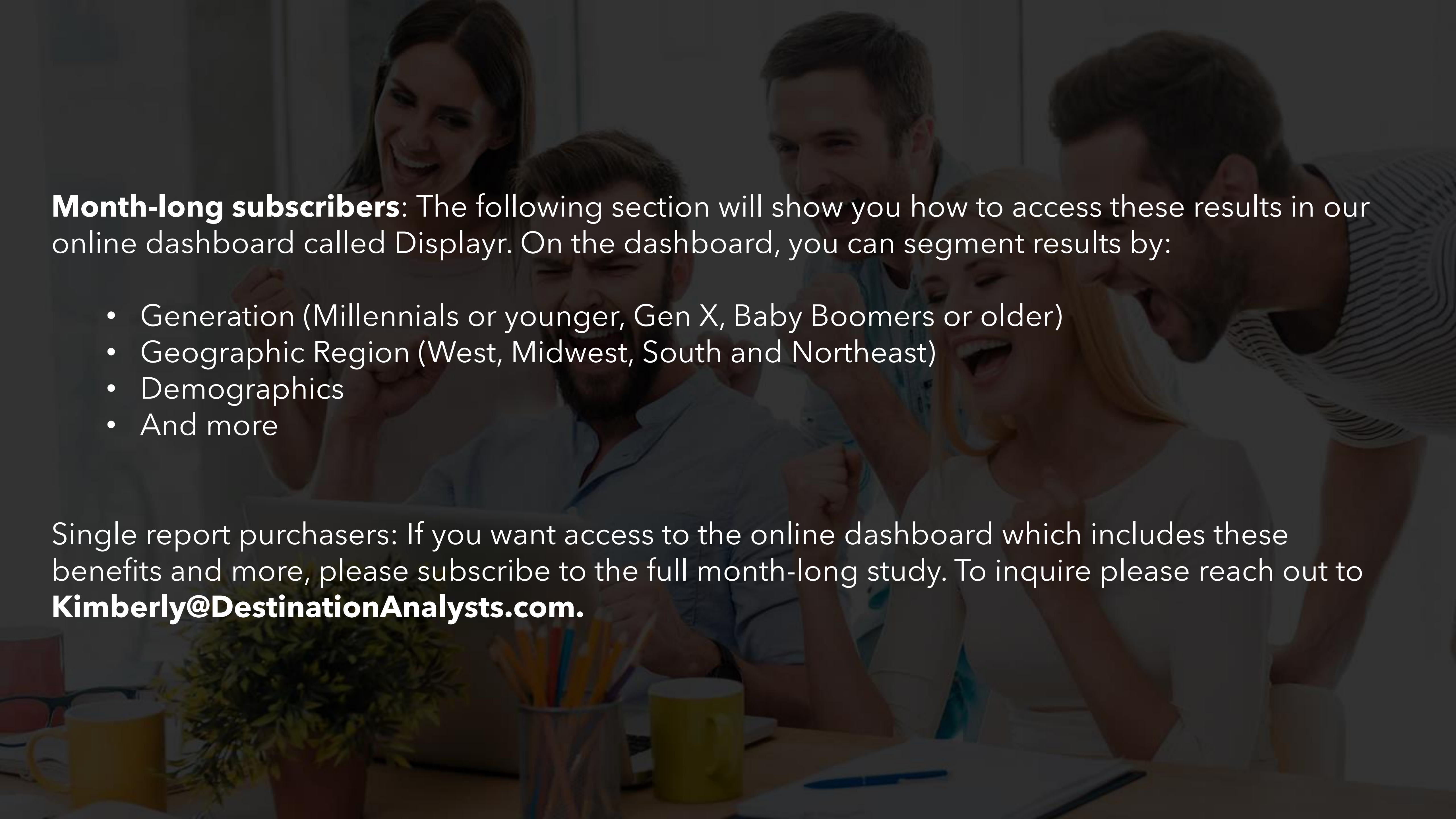
(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

New Question Added in Wave 4





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%

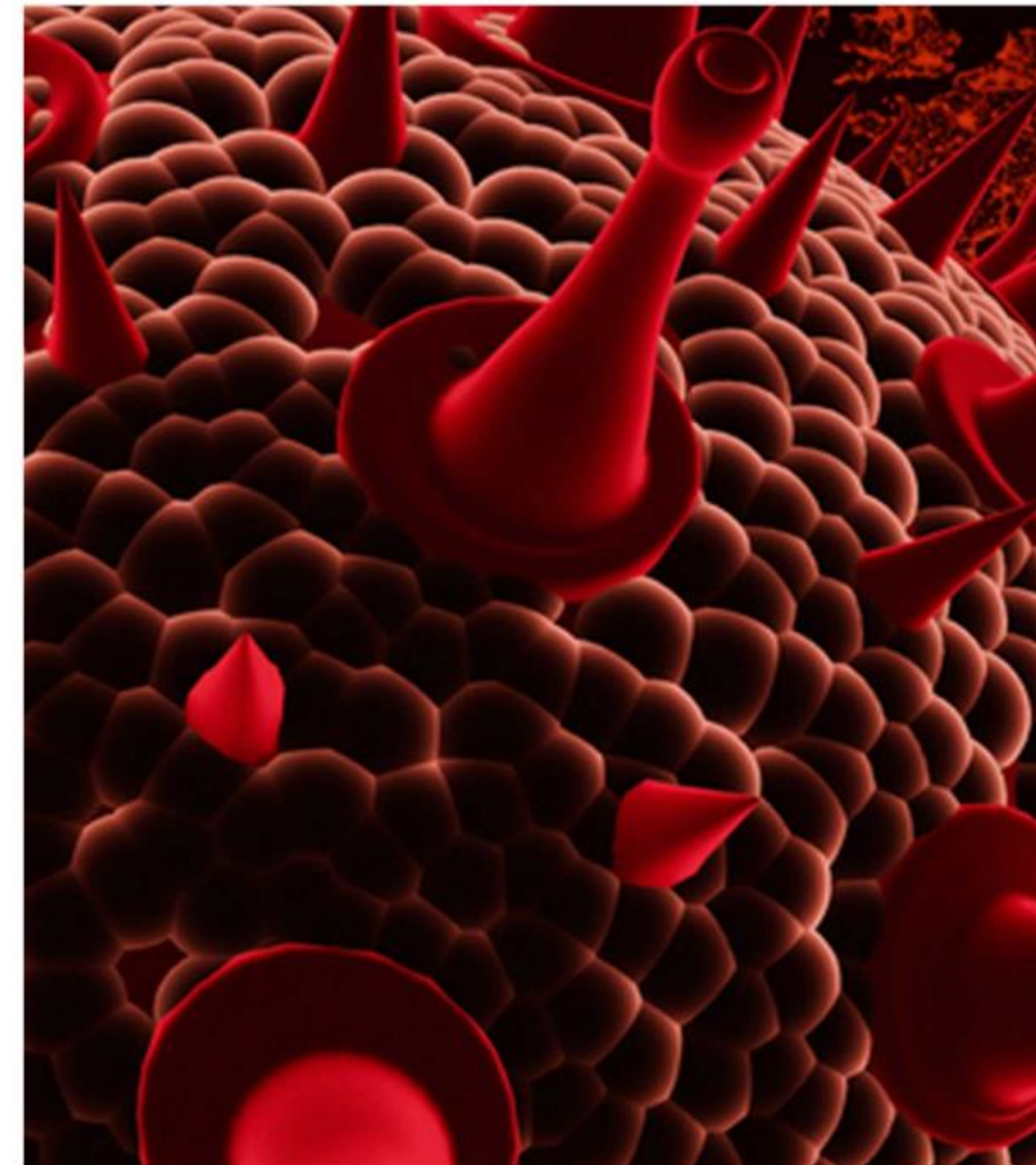
CTMX	0.45	▲ +0.45%
FTR	-0.23	▼ -2.34%
CSCO	-1.01	▼ -1.89%
CHK	0.02	▲ +0.21%
AAPL	+2.58	▲ +3.05%
PRT0	-0.14	▼ -1.42%
AMZN	-0.73	▼ -0.90%
TSLA	+1.08	▲ +5.12%
AVGO	-0.87	▼ -3.88%
SIRI	-0.65	▼ -1.37%

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.

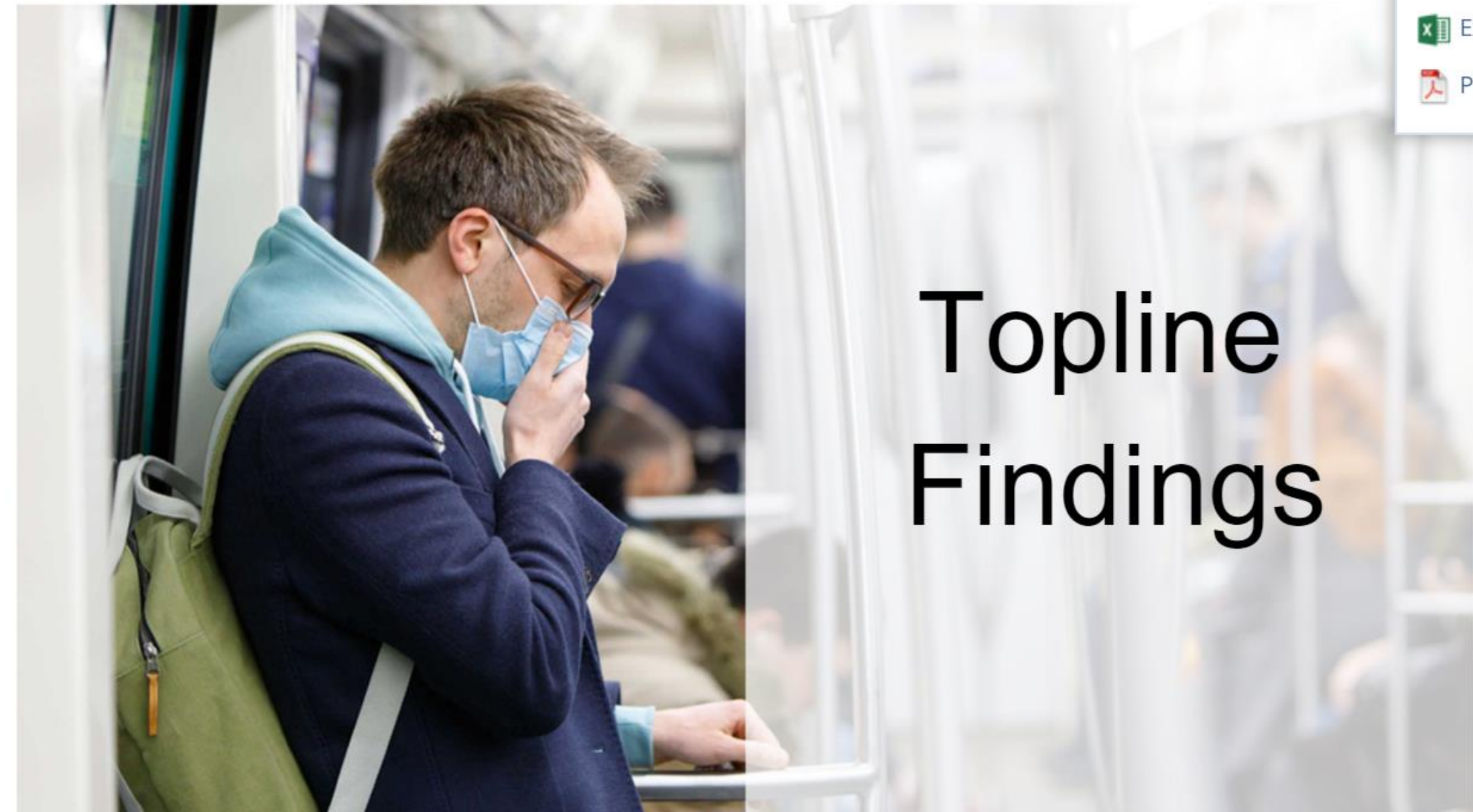
EXPORTING THE DATA:

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



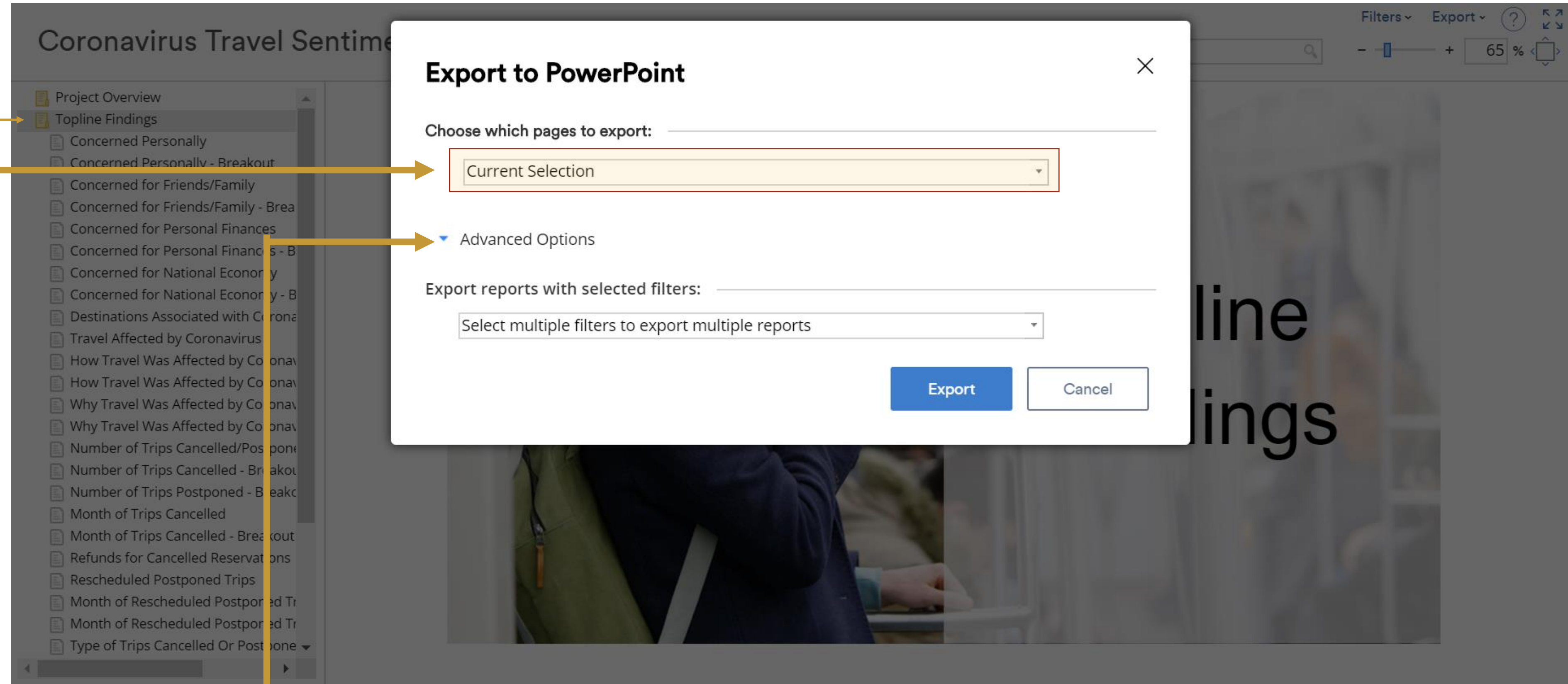
Topline Findings

EXPORTING THE DATA:

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

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

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



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

NEED MORE HELP?

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

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