

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 5

RESEARCH FINDINGS

April 13, 2020

Destination  Analysts

TABLE OF CONTENTS

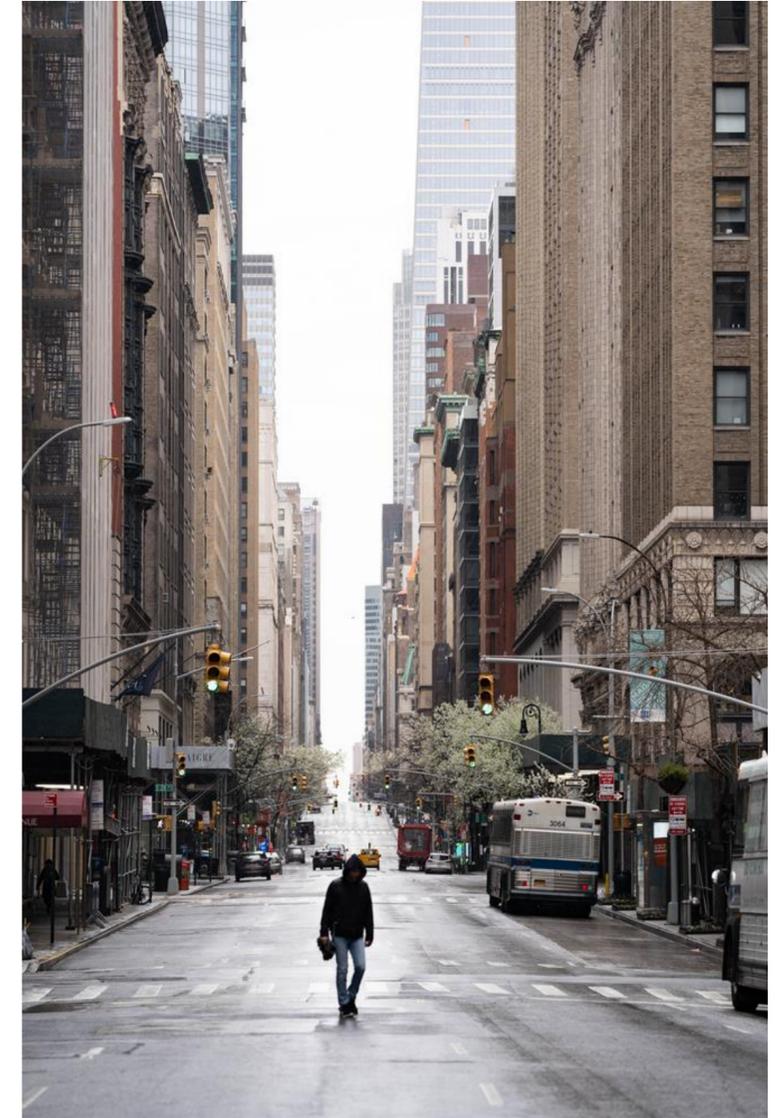
Project Overview	3
Key Findings	5
Current Feelings About Travel	12
Impacts on Travel	22
Opinions on Travel & the Coronavirus	38
Data Tables	65

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 fifth 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 fifth wave of this survey was collected from April 10-12, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,263 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



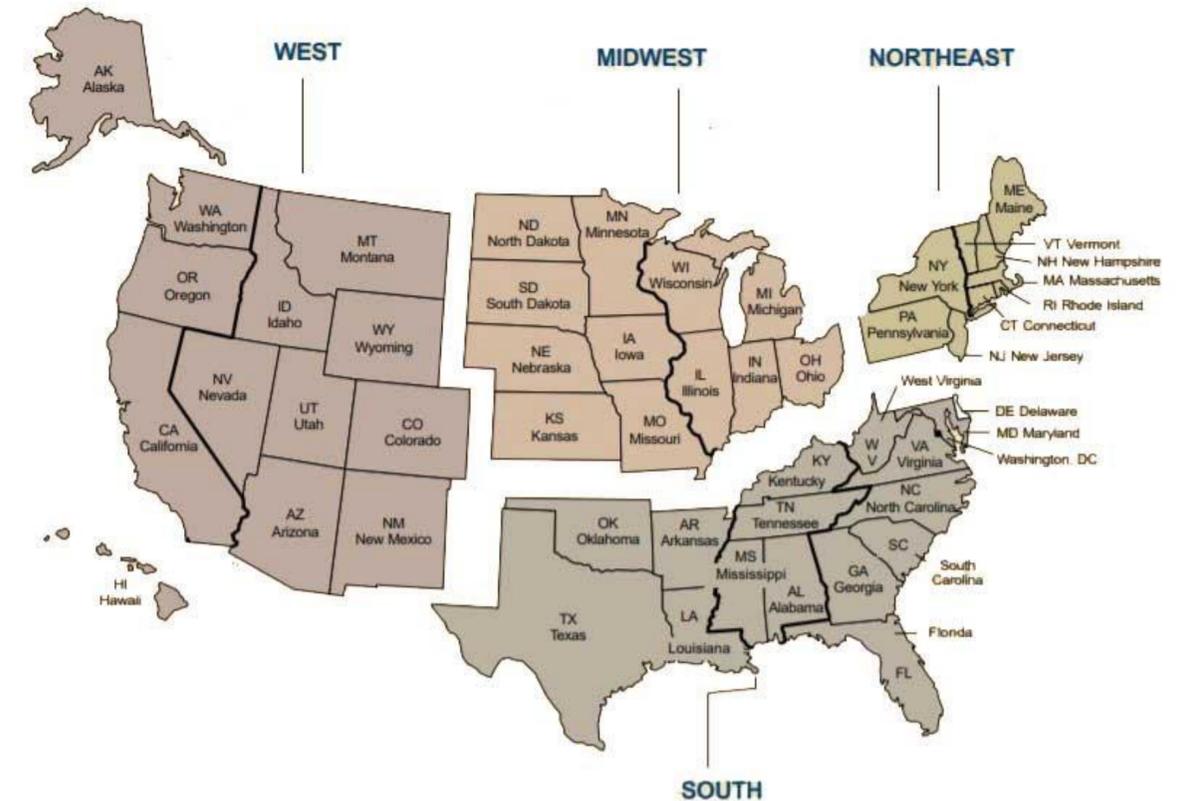
This report is made available for use by clients of Destination Analysts, Inc. Reproduction or distribution of the report in whole or part, without written permission is prohibited.

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

In this fifth wave of this consumer sentiment project, the following key findings emerged:

- **Americans' concern about personally contracting the coronavirus has stabilized.** In total, 74.0 percent of survey respondents now say they have some level of concern about contracting the virus, nearly the same 74.4 percent last week. The health of friends and family continues to be a top concern, with 81.8 percent expressing concern for the safety of their loved ones, down slightly from 83.4 percent last week.
- **Economic concerns are significant.** Most American travelers are concerned that the pandemic will impact their personal finances (71.9%). This is unchanged from 71.1 percent last week. National economic concerns remain high. Nearly 90 percent of travelers expressed some level of concern for the national economy.



Key Findings



- **Cruises continue to be regarded as the least safe travel activity.** This week, two new categories were added to the question, both related to sports event travel. Both large venue and small venue sporting events are considered at least somewhat unsafe at this time by a majority of travelers. Over the last three weeks, the perceived safety of various travel activities appears to have stabilized, while the first two weeks of the study 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 stayed constant this week,** as 69.3 percent of American travelers agree that they miss traveling and can’t wait to get out and travel again. Relatively few American travelers, however, expect to jump right back into traveling after the coronavirus situation abates. Just over 1-in-10 say they will do so. The vast majority prefer a more conservative approach.
- **In the fifth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus held constant at 72.8 percent.** Over the last five weeks, the proportion of American travelers cancelling trips due to the coronavirus has grown from 55.1 percent to 66.9 percent. Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with two-thirds of respondents citing it as a reason (66.3%).

Key Findings

- **Cancellations.** The average American traveler says they have cancelled 2.1 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.8 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 May, June and July trips. Increases in the proportion of travelers being fully refunded for cancelled trips has slowed. This week, 66.0 percent report receiving full refunds, compared to 64.9 percent last week.
- **Postponements.** Approximately 7-in-10 American travelers who have postponed a trip due to the pandemic have not yet rescheduled it. Postponements are appearing to be spread across the summer months. Looking at the remaining months of the year, there is a significant increase in the percent of Americans postponing their trips to October. Over the course of the month, we have seen increases in the proportion of travelers cancelling all types of trips. This week, postponements of vacations, weekend getaways, business trips and leisure day trips have increased. Urban areas are still the most postponed destination type.



Key Findings



- **Almost one-third (31.2%) of those postponing or cancelling a trip did so for a trip to a foreign country.** This figure has remained stable for the past four waves. Unchanged from last week, 4-in-5 American travelers (81.4%) said they're unlikely to travel outside the U.S. until the coronavirus situation is resolved.
- **In a major change this week, far fewer travelers feel the situation will get worse in the next month.** This week, only 48.5 expect the coronavirus situation to get worse in the next month, down sharply from 71.3 percent last week. Currently, traveler sentiment is still against travel. 8-in-10 American travelers say they are done traveling until the coronavirus situation blows over. More than half (52.2%) strongly agree with this sentiment.
- **Travelers are still mixed on whether the coronavirus situation will be resolved by the summer travel season.** Similar proportions agree and disagree that the situation will be resolved by summer. About one-half of American travelers (51.3%) expect to be back traveling this Fall. Only 20.7 percent disagree, up from 16.4 percent last week.

Key Findings

- **Staycations will likely be up this summer.** 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 55.2 percent in the most recent wave.
- **Car travel may displace some air travel this year, with 45.4 percent of American travelers saying they may avoid airlines and instead travel by car.** This metric increased by 6 percentage points this week. Similarly, 47.8 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 five waves of this project.
- **Trust that attending meetings in the current environment remains low.** As was the case last week, nearly 8-in-10 travelers (79.7%) now say they will be unlikely to attend these events until the coronavirus situation is over.
- **American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves.** This week, just over 1-in-5 (21.7%) Americans said they felt comfortable doing this. Nearly 9-in-10 American travelers now report living in a community with known cases of the virus.



Key Findings

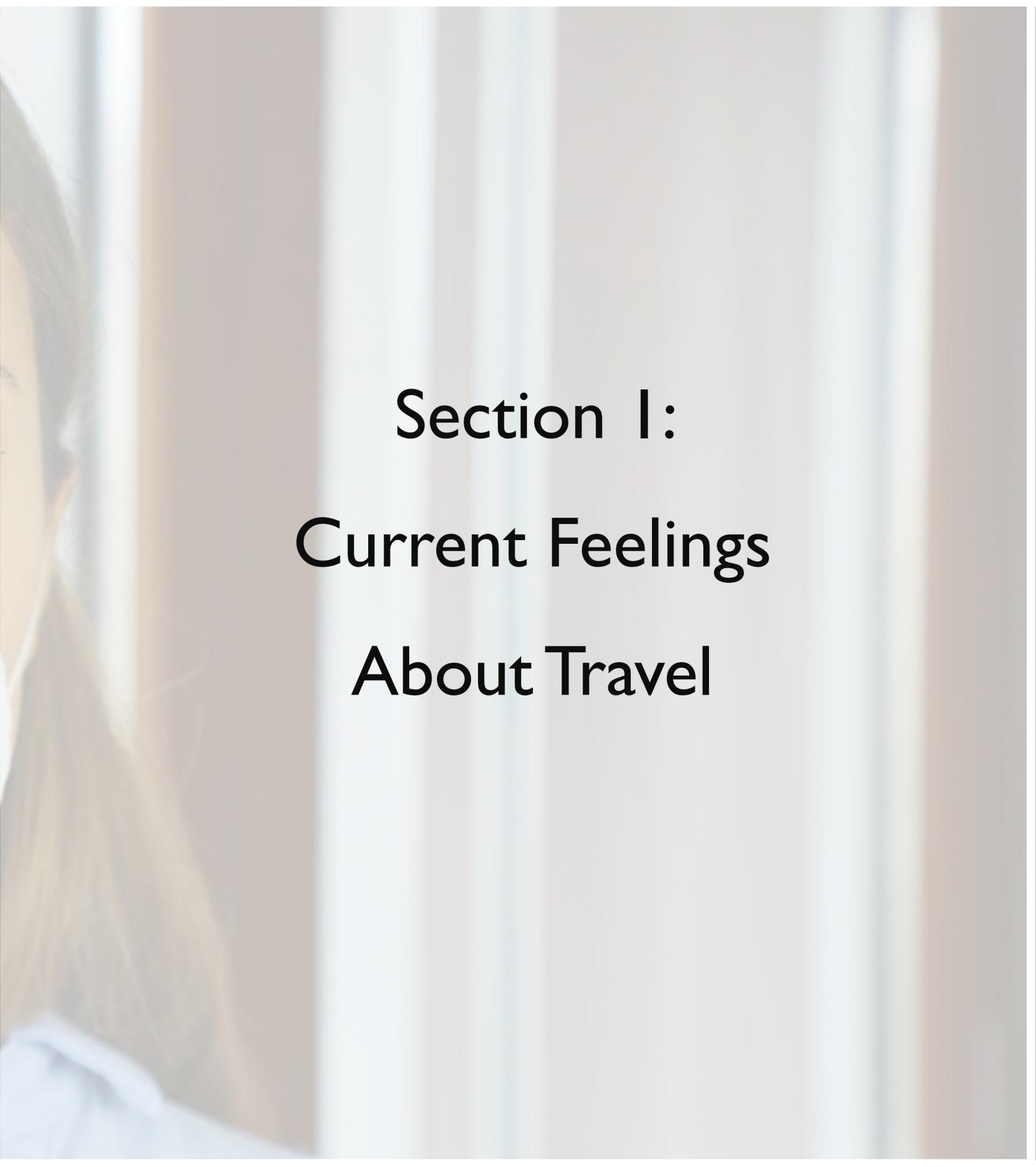


- **Travel shaming.** Half of Americans (51.6%) feel that persons traveling now should be ashamed of this behavior. Only 16.0 percent disagree.
- **Local support.** 6-in-10 American travelers (59.3%) say they have been taking action to try to support local businesses where they live.
- **Business restrictions.** Approximately half of employed American travelers (53.7%) say their employer has put travel restrictions into effect, down from 55.0 percent last week. Nearly 4-in-10 employed American travelers with employer-mandated travel restrictions (36.2%) 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 two months has plummeted, there does appear to be some increases on the horizon for the late Fall months.
- **Travelers' interest in learning about new travel experiences and destinations grew slightly this week.** This week, 4-in-10 (37.0%) expressed high levels of excitement about the topic, up from 33.5 percent last week.

Key Findings

- **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 steep 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.
- **Will the pandemic change destination selection?** Two-in-five American travelers say they expect to change the types of travel destinations they choose to visit after the coronavirus situation blows over. When asked which specific travel behaviors they will likely avoid after the crisis is over, half or more said they would avoid cruises (56.5%), crowded destinations (55.7%) and/or areas hardest hit by the coronavirus (50.5%).
- **First trip after the pandemic.** American preferences for their first trip after the pandemic seem to favor beach destinations and resorts, as well as smaller destinations over big cities.





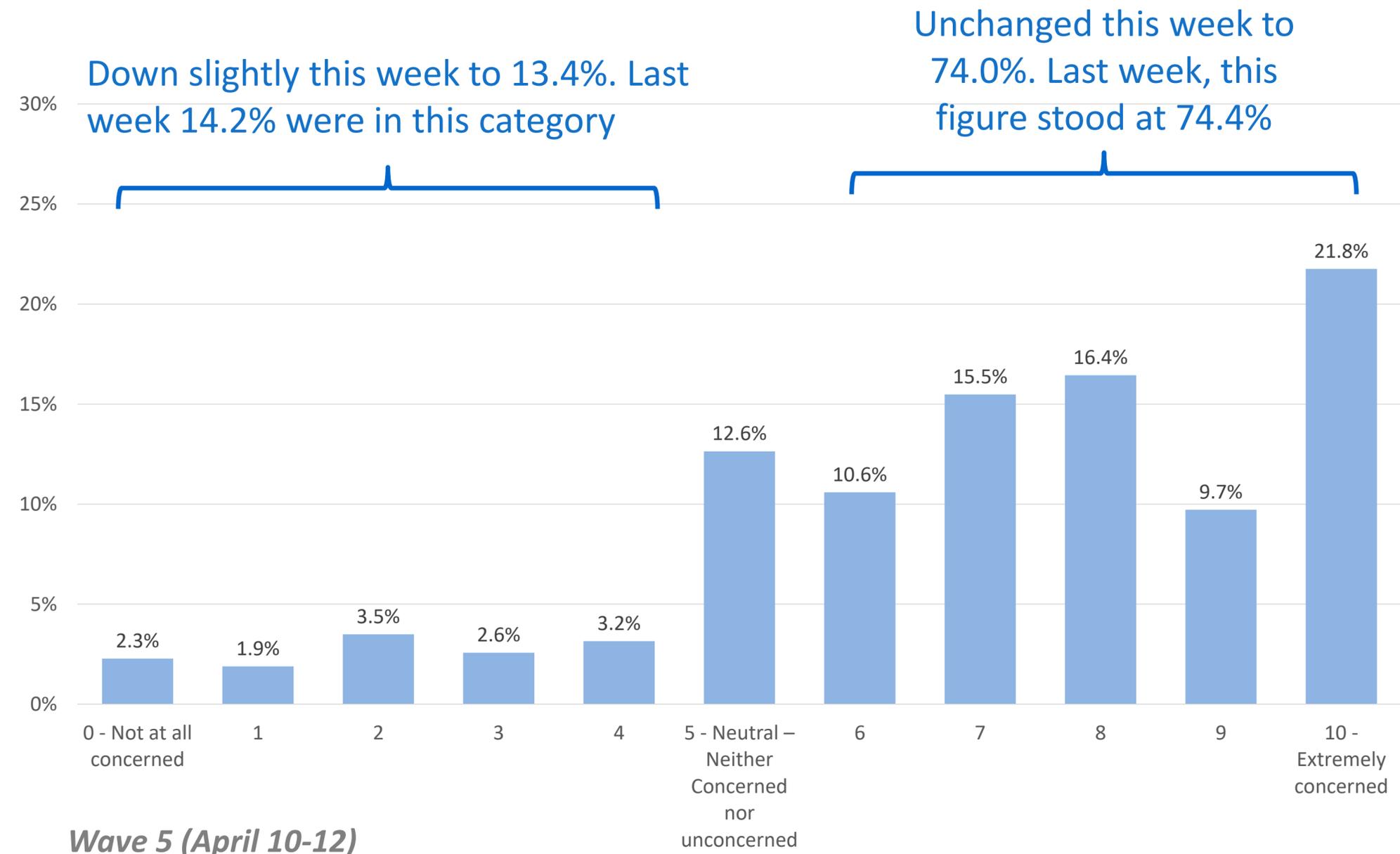
**Section I:
Current Feelings
About Travel**

Personal Health Concerns

Americans' concern about personally contracting the coronavirus has stabilized. In total, 74.0 percent of survey respondents now say they have some level of concern about contracting the virus, nearly the same as 74.4 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 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

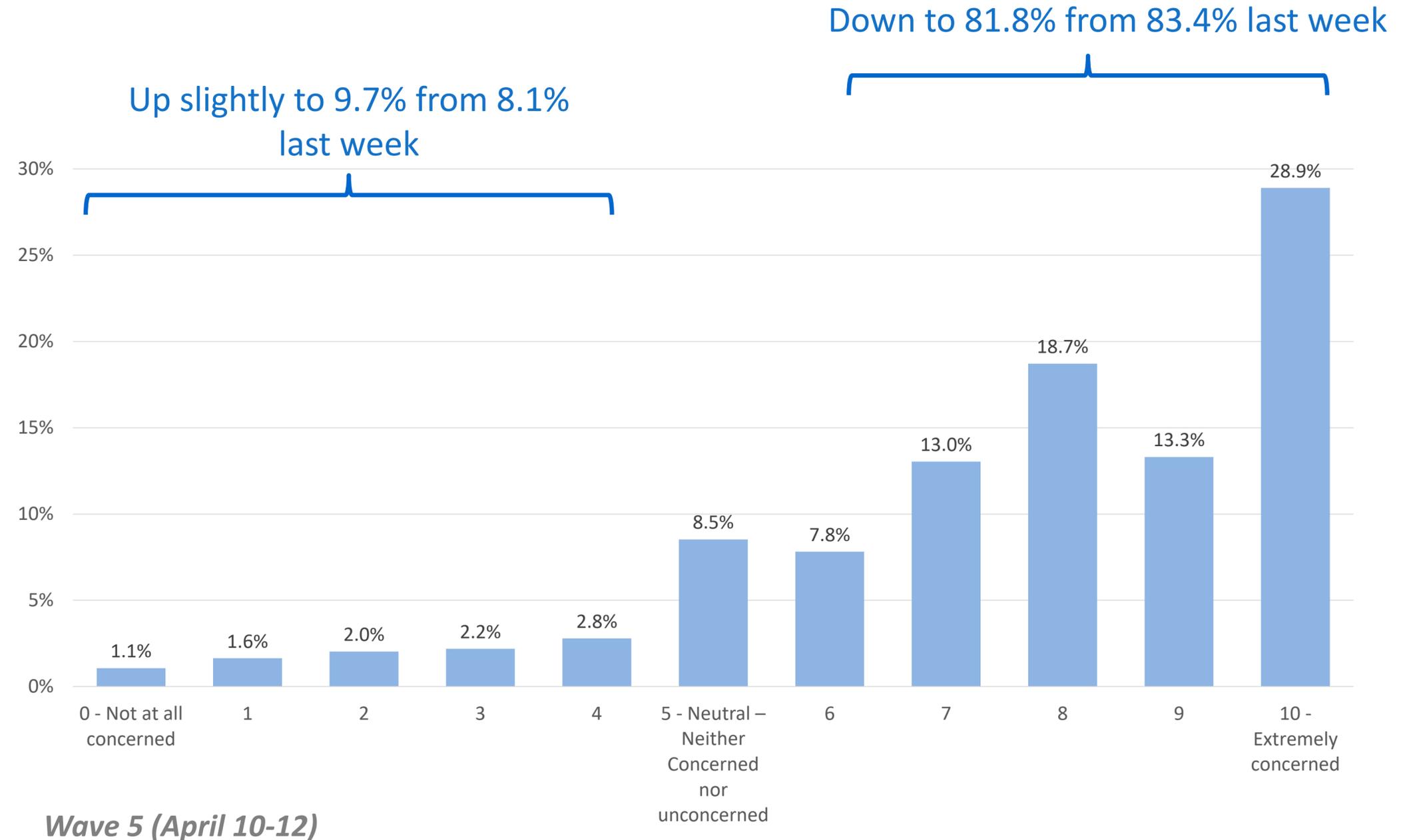


Health Concerns (Family & Friends)

The health of friends and family continues to be a top concern, with 81.8 percent expressing concern for the safety of their loved ones, down slightly from 83.4 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)

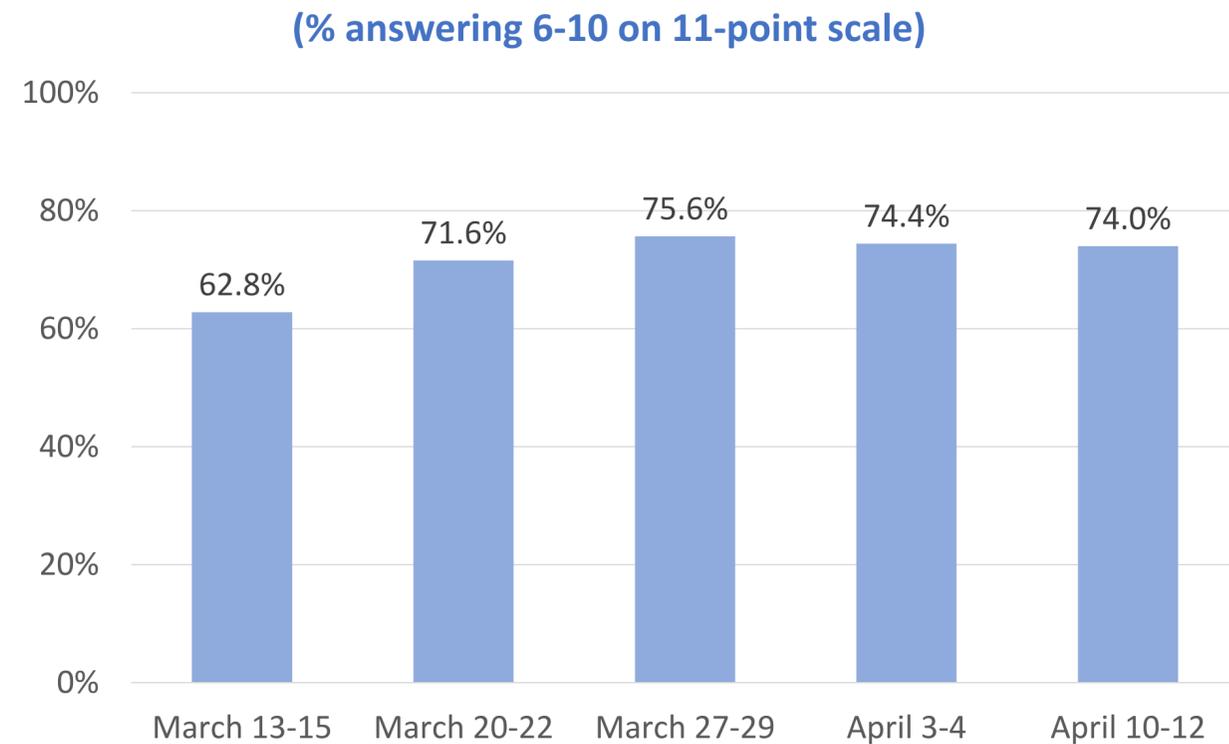
(Base: Wave 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



Summary: Safety Concern Metrics

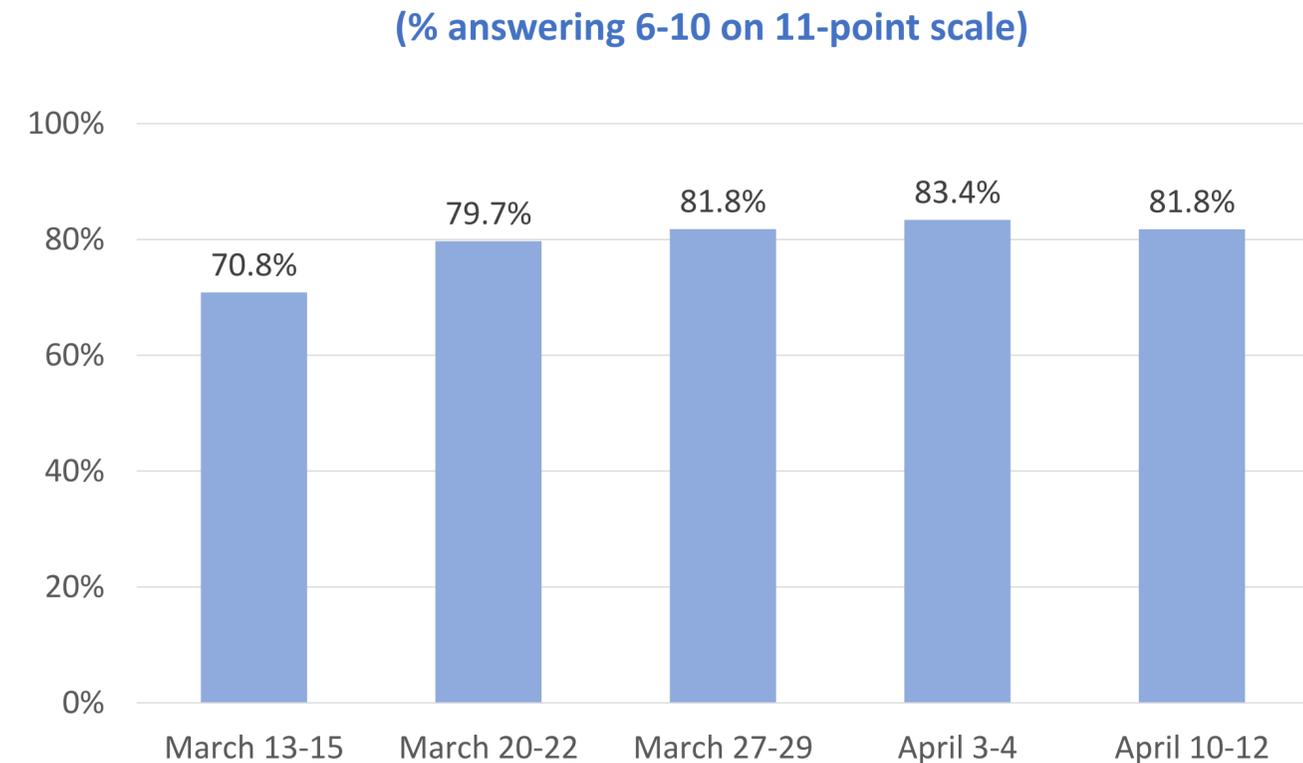
Summary charts for the safety concern metrics are shown below.

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)

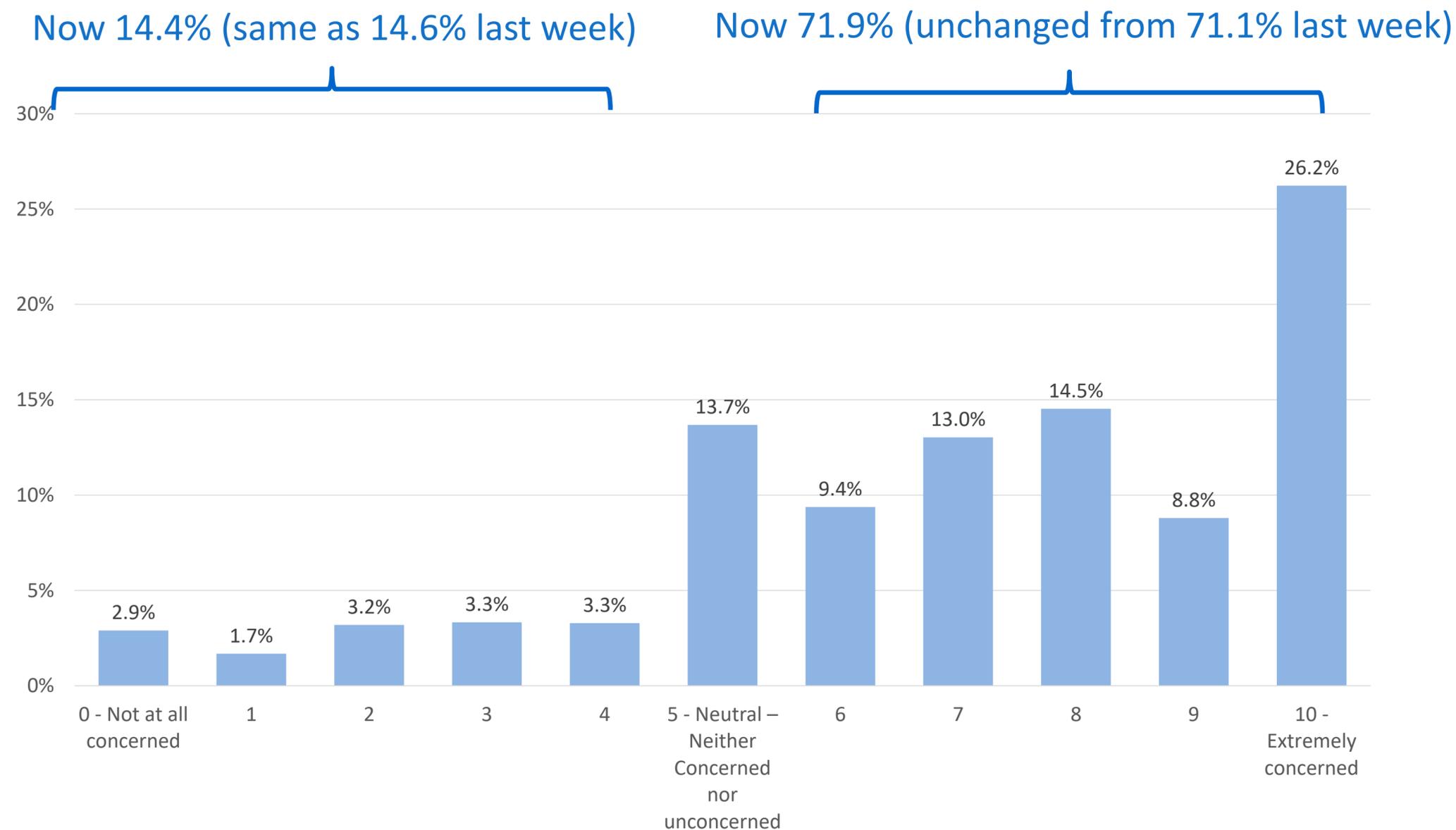
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Concerns About Personal Finances

Most American travelers are concerned that the pandemic will impact their personal finances (71.9%). This is unchanged from 71.1 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 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



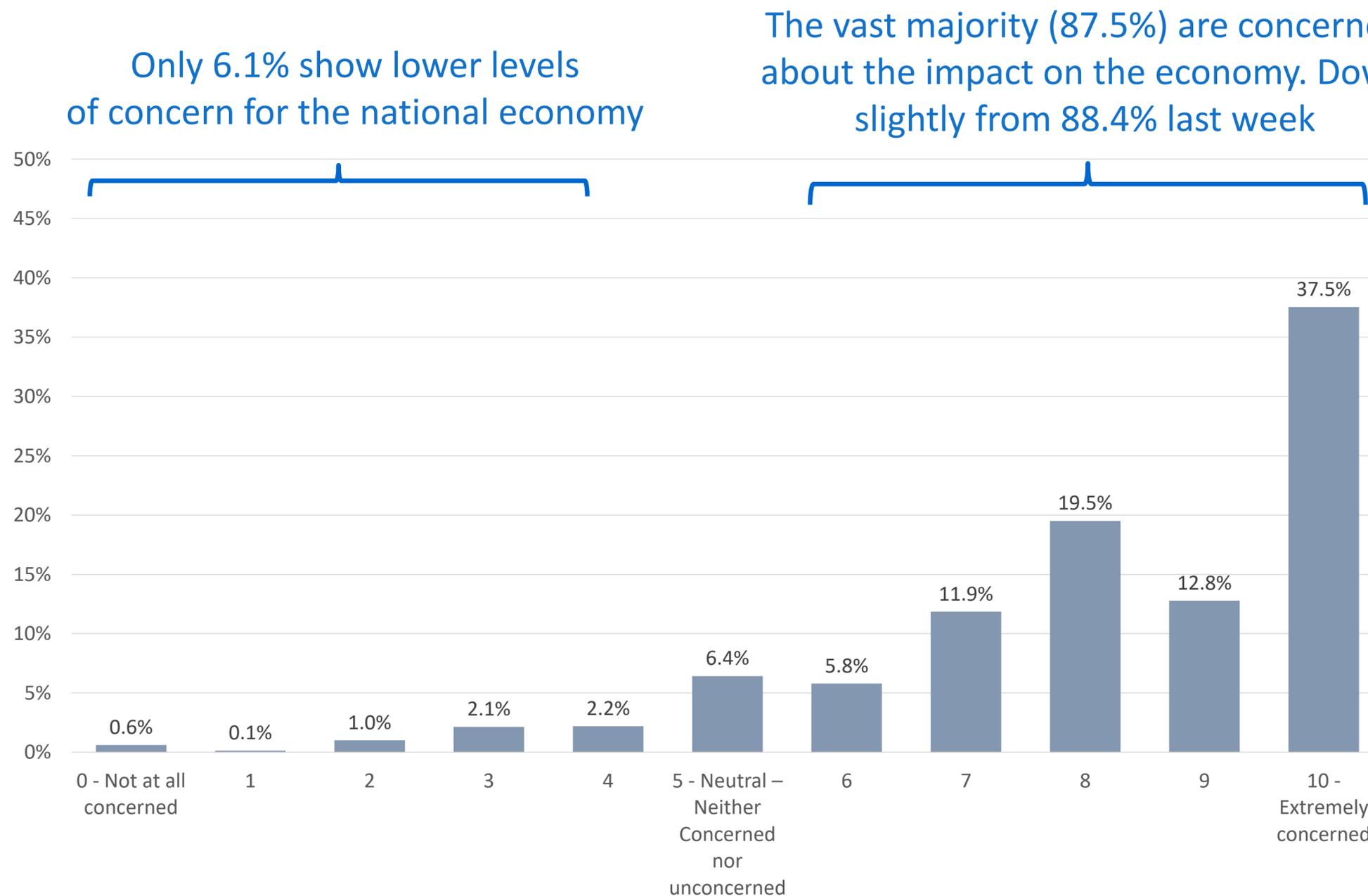
Wave 5 (April 10-12)

Concerns About National Economy

National economic concerns remain high. 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 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



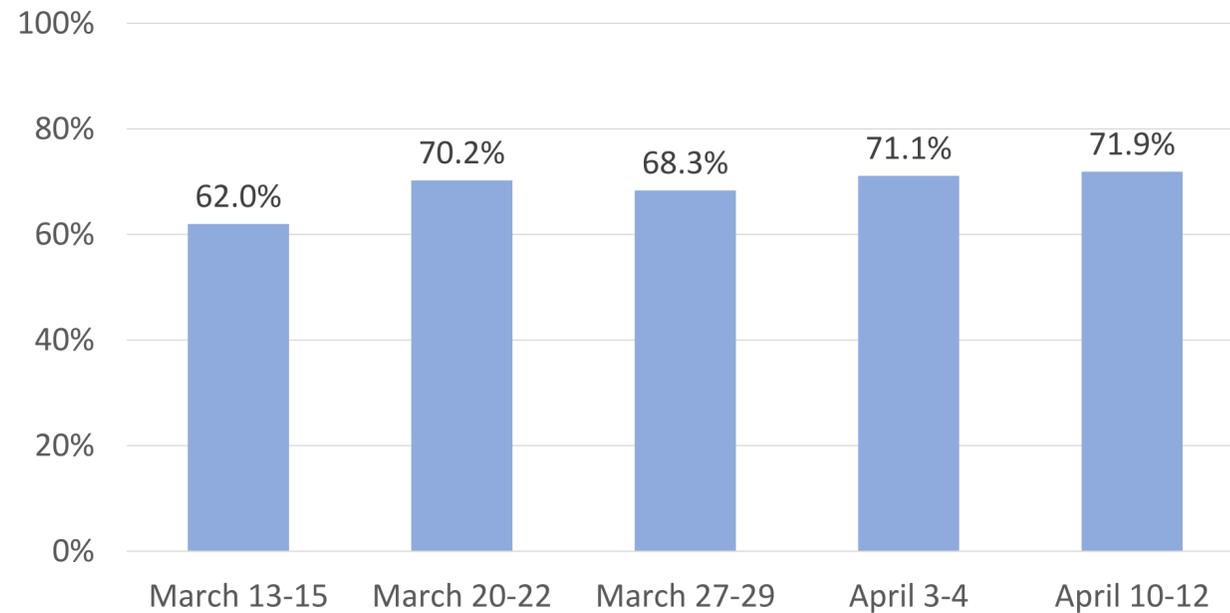
Wave 5 (April 10-12)

Summary: Economic Concern Metrics

Summary charts for the two economic concern metrics are shown below. Both remain nearly unchanged from last week.

Personal Finances

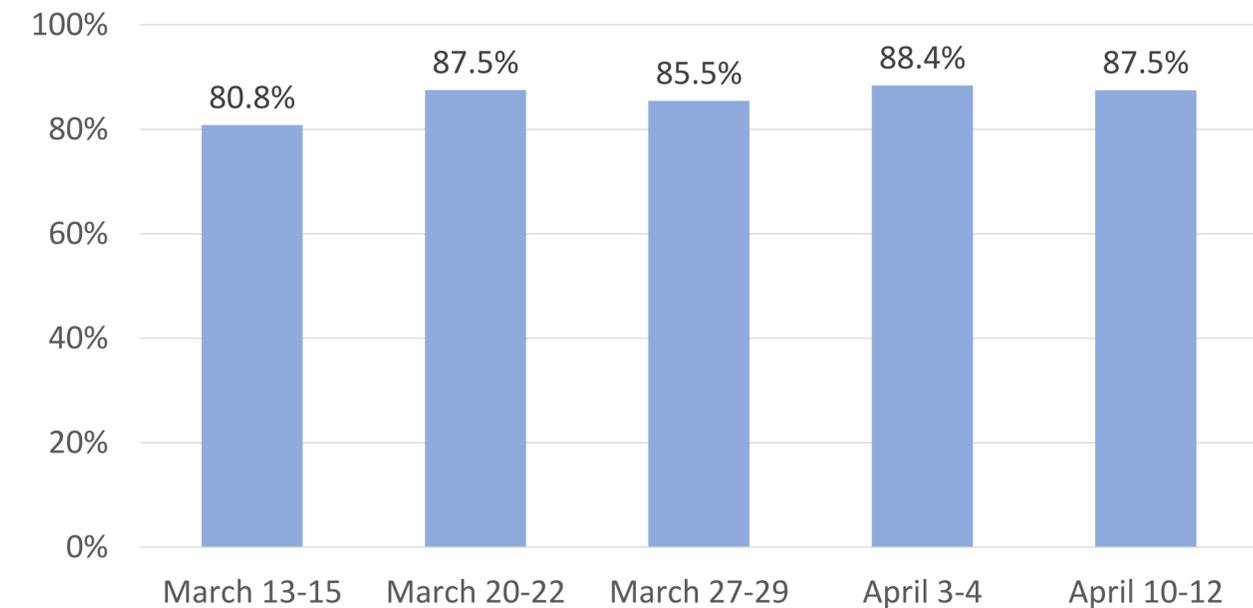
(% answering 10-6 on 11-point scale)



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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29d April 10-12)

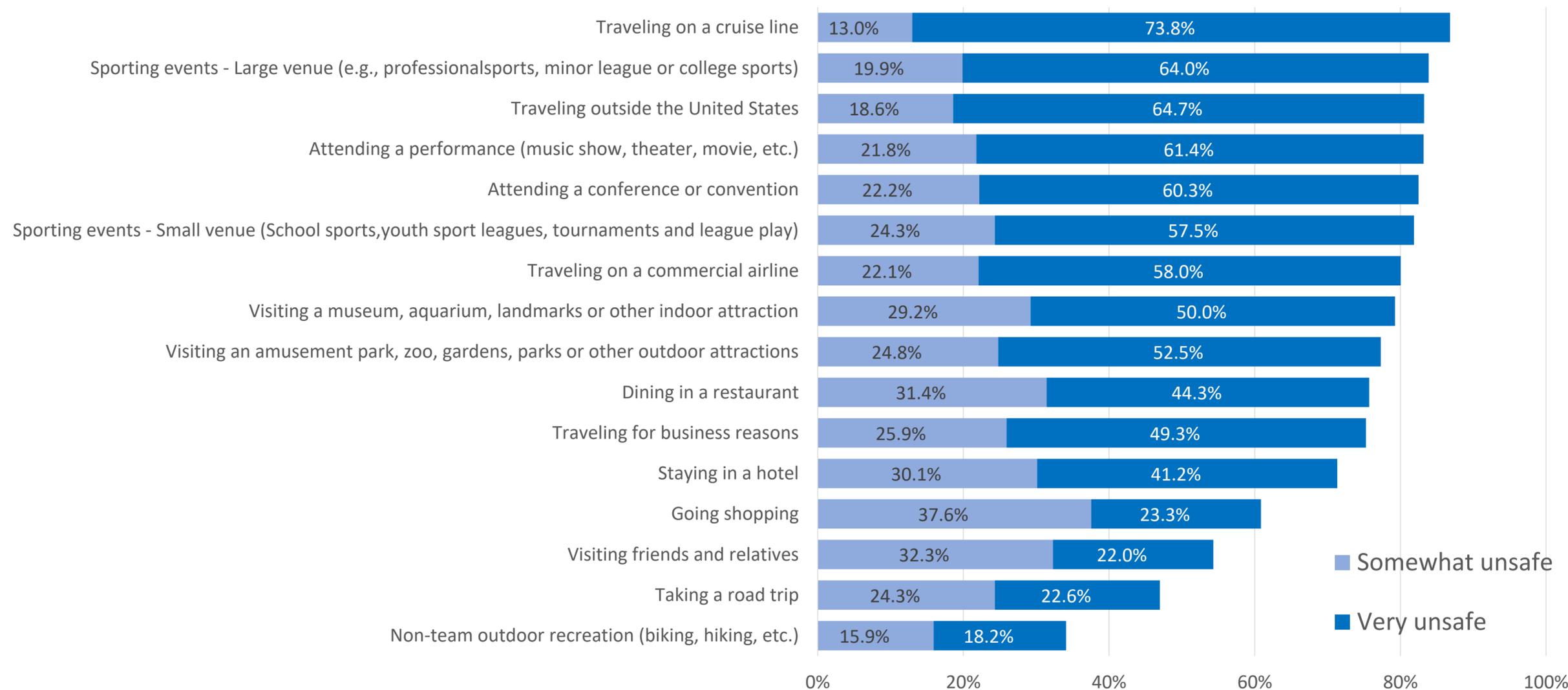
Perceived Safety of Travel Activities (Wave 5)

Cruises continue to be seen as the least safe travel activity. This week, two new categories were added to the question, both related to sports event travel. Both large venue and small venue sporting events are considered at least somewhat unsafe at this time by a majority of travelers.

Wave 5 (Collected April 10-12)

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

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

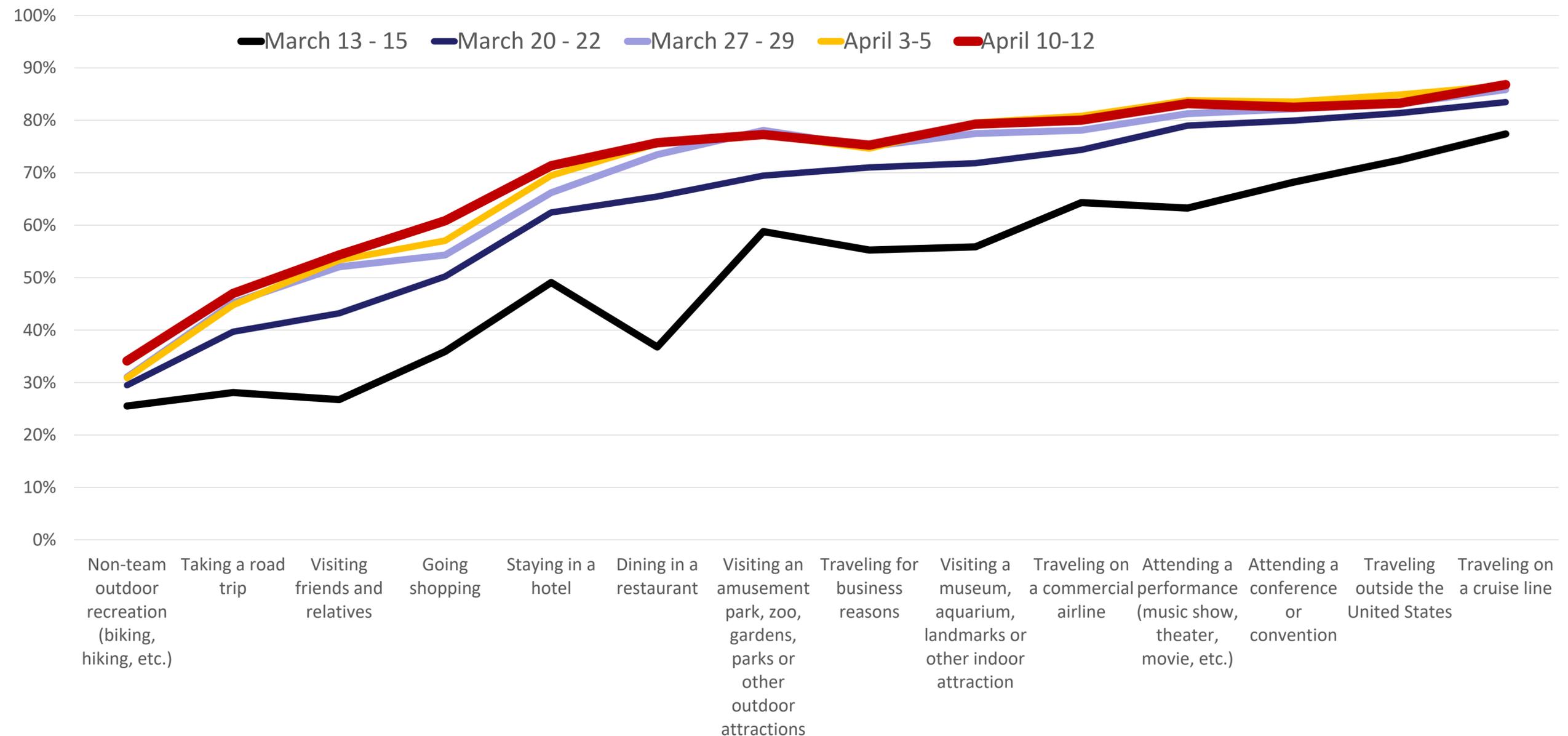


Perceived Safety of Travel Activities (Waves 1-5 Comparison)

Over the last three weeks, the perceived safety of various travel activities appears to have stabilized. The first two 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?

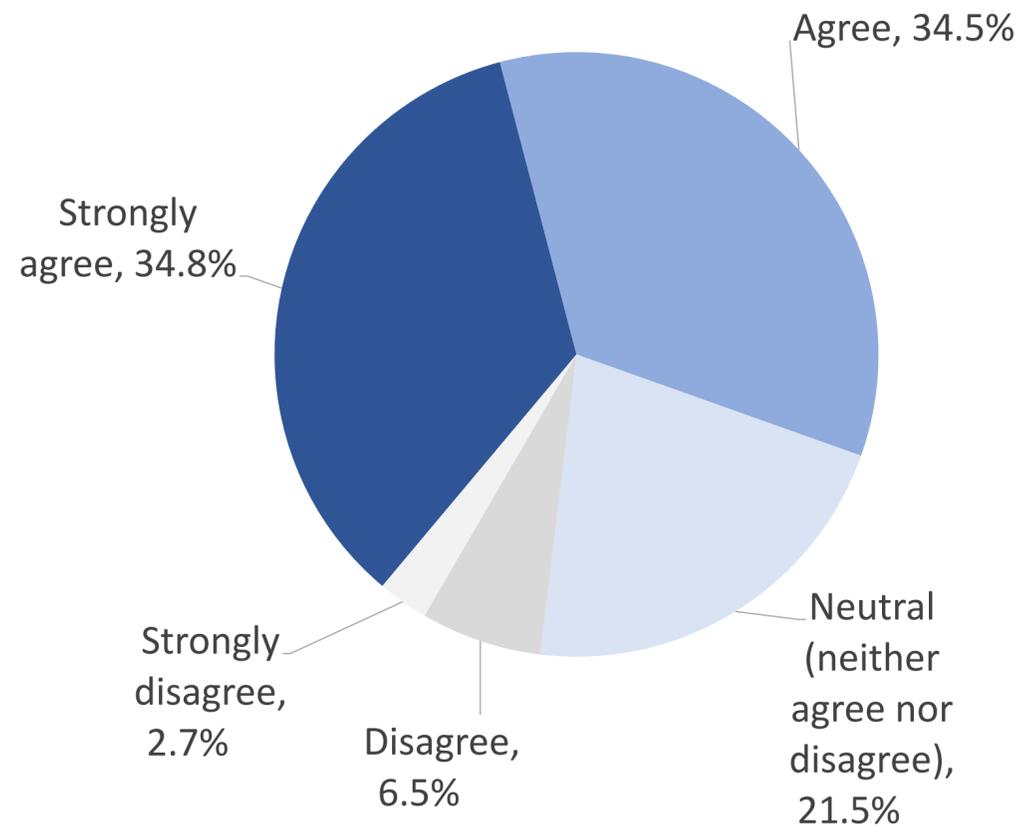
(Base: (Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



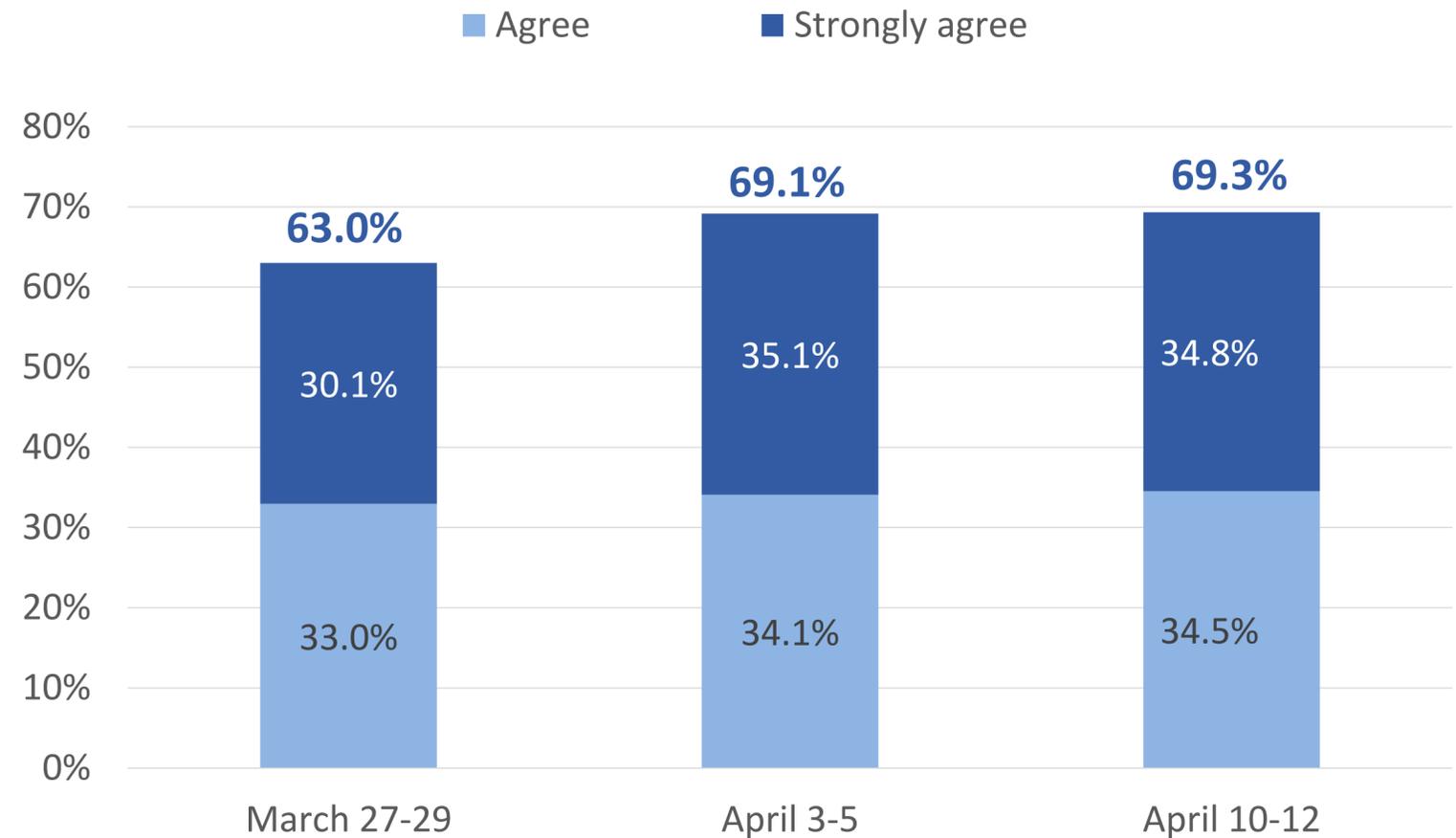
Excitement to Get Back to Travel

How much do you agree with the following statement?

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



Traveler excitement to get back out on the road stayed constant this week, as 69.3 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.



(Base: All respondents, 1,201, 1,216 and 1,263 completed surveys. Data collected March 27-29, April 3-5 and 10-12, 2020)

How Will They Get Back to Travel?

A new visually-based survey question was added this week. It is shown below, and results are shown on the following page.

In the period after coronavirus, how are you going to approach getting back into travel? (Pick the image that best describes you)



I'll test the waters first



I'll get back in but carefully



I'll jump right back in

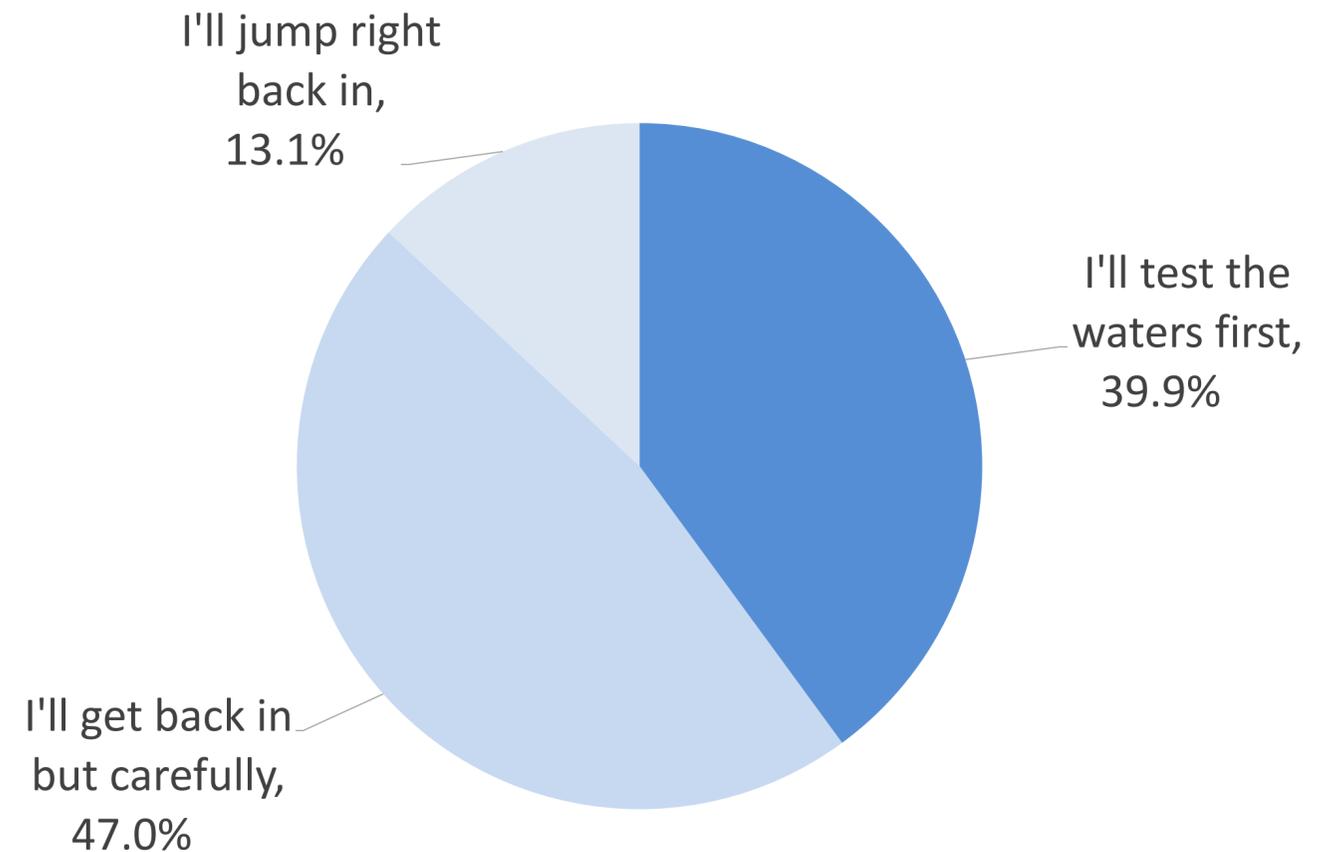
How Will They Get Back to Travel?

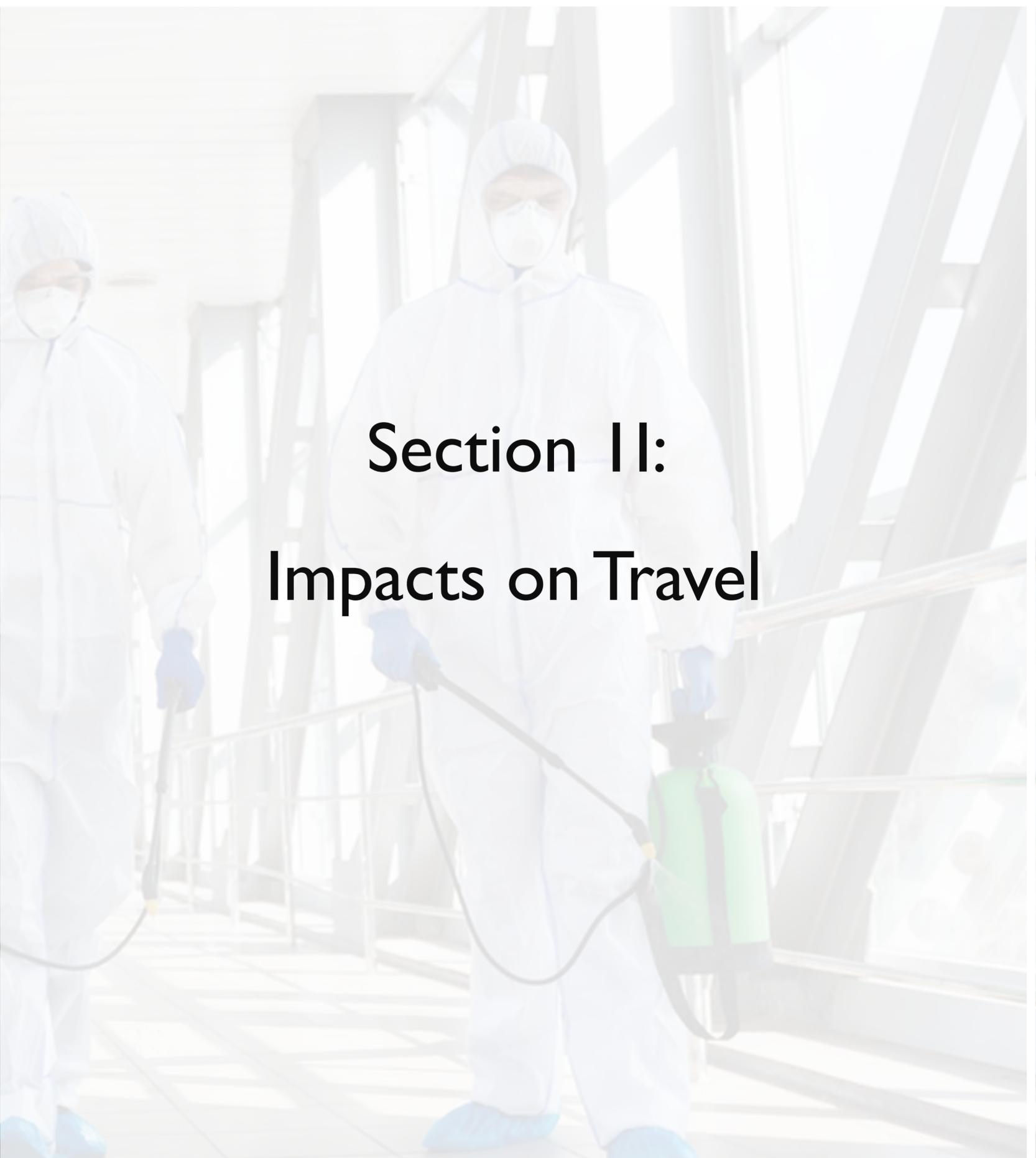
Relatively few American travelers expect to jump right back into traveling after the coronavirus situation abates. Just over 1-in-10 say they will do so. The vast majority prefer a more conservative approach.

Question: In the period after coronavirus, how are you going to approach getting back into travel? (Pick the image that best describes you)

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

New Question Added in Wave 5





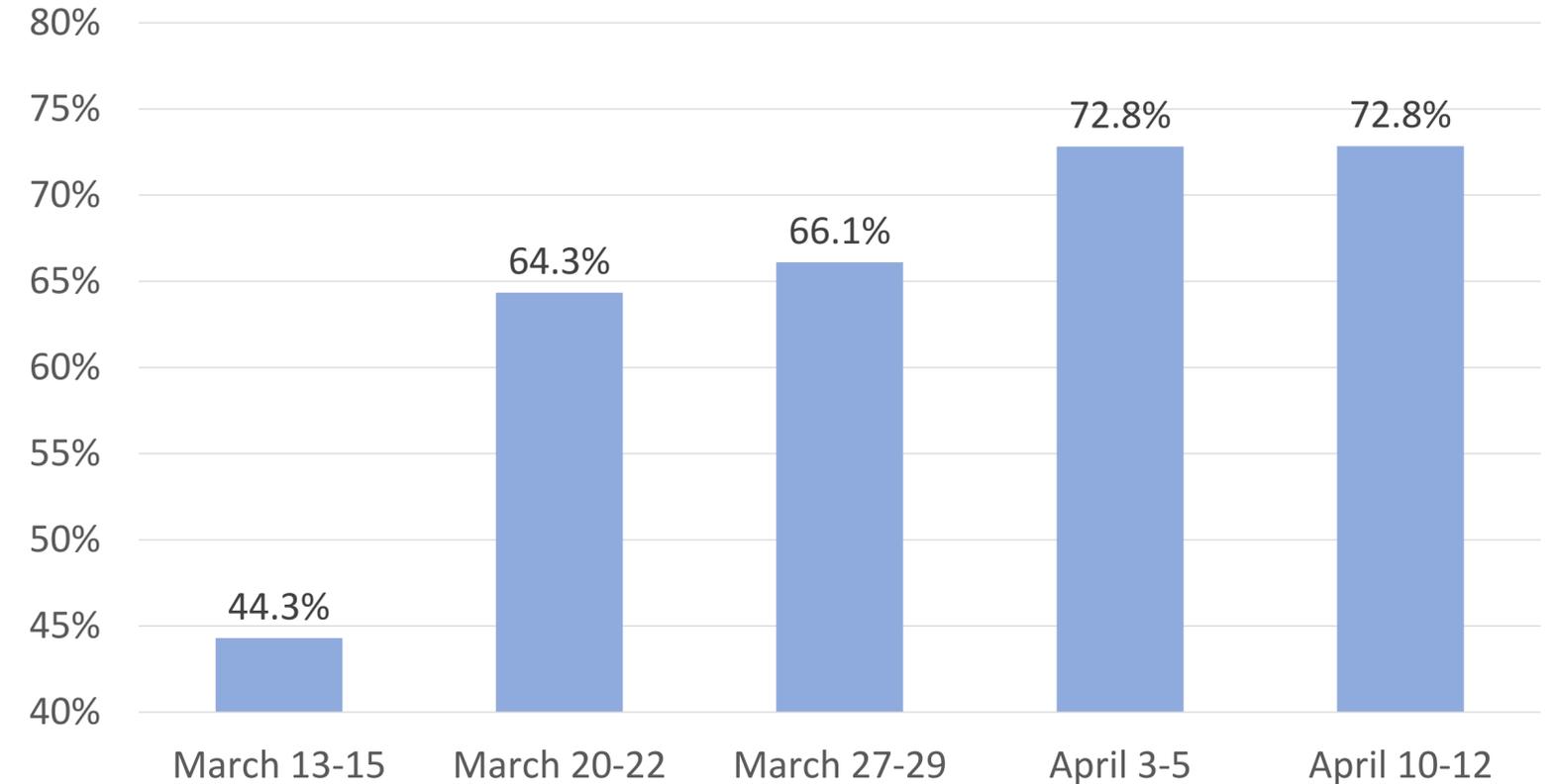
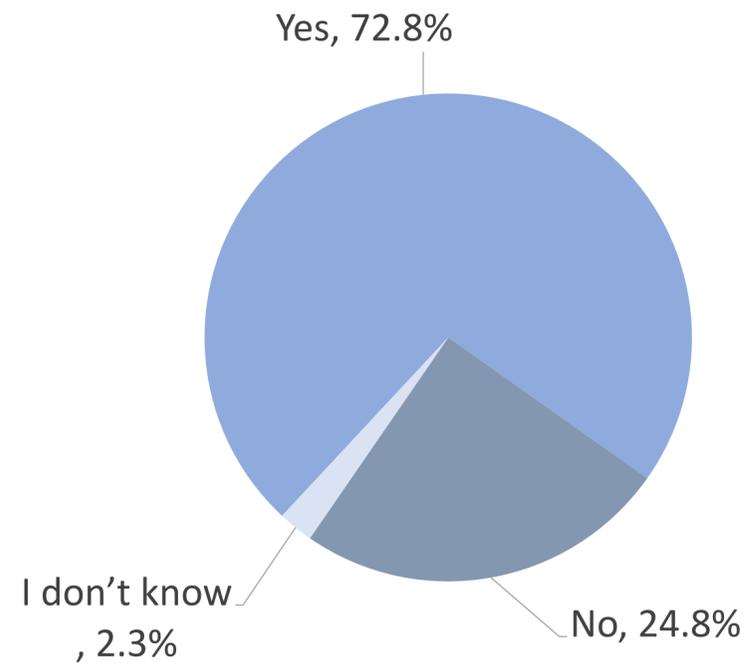
Section II: Impacts on Travel

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 fifth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus held constant at 72.8 percent.

Wave 5 (April 10-12)



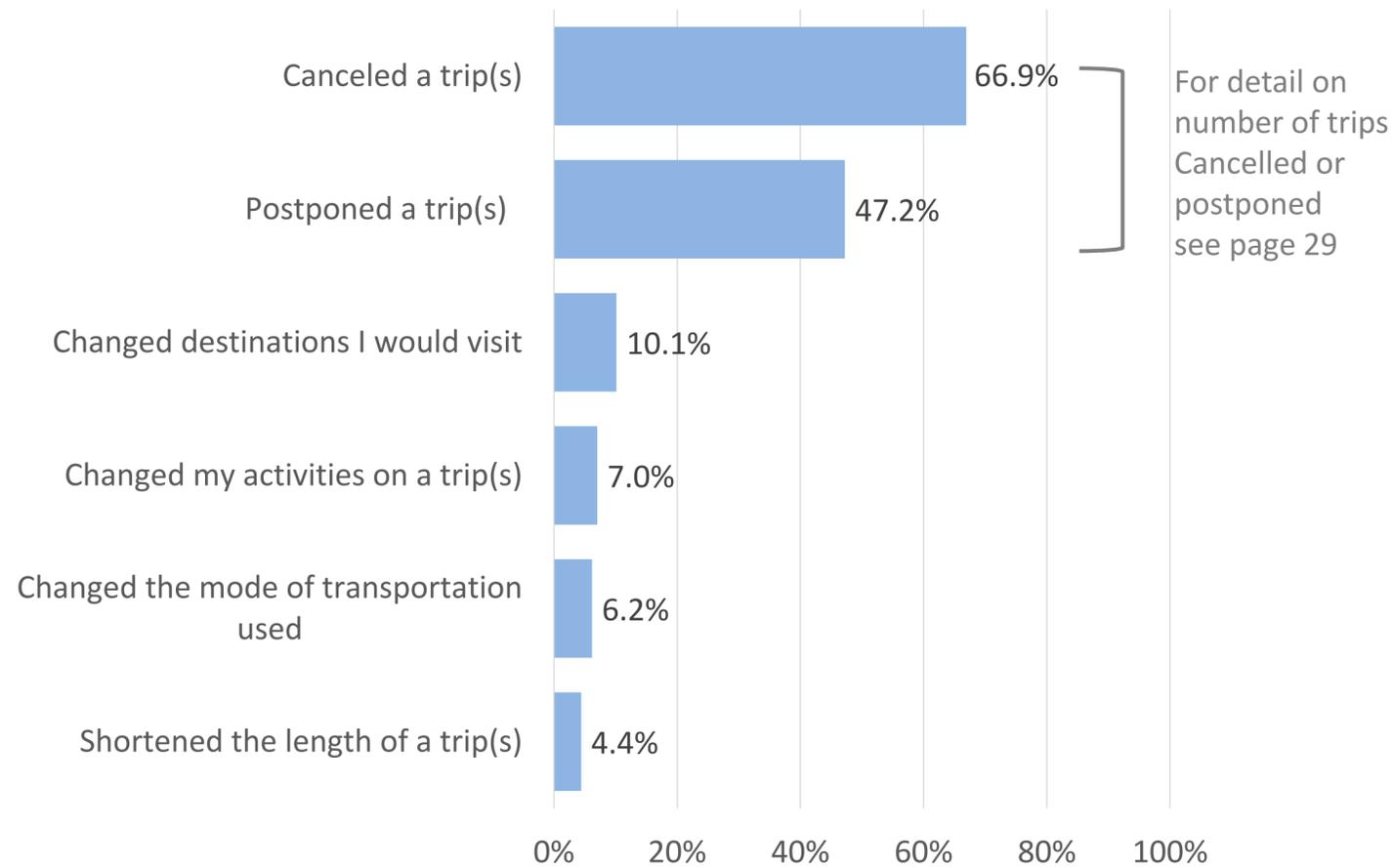
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12)

How the Coronavirus has Impacted Travel

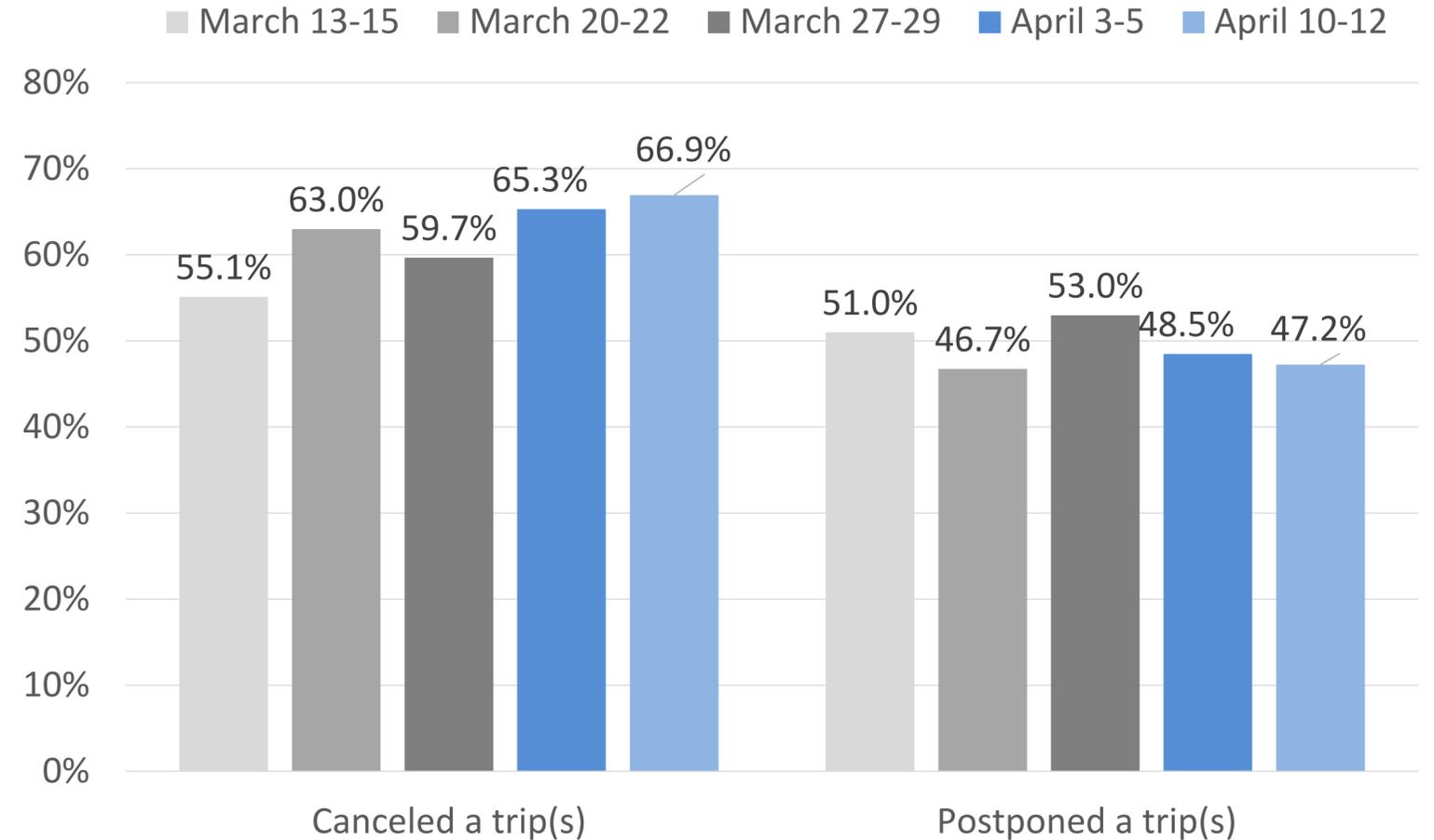
Question: How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have _____.

Wave 5 (April 10-12)



Over the last five weeks, the proportion of American travelers cancelling trips due to the coronavirus has grown from 55.1 percent to 66.9 percent.



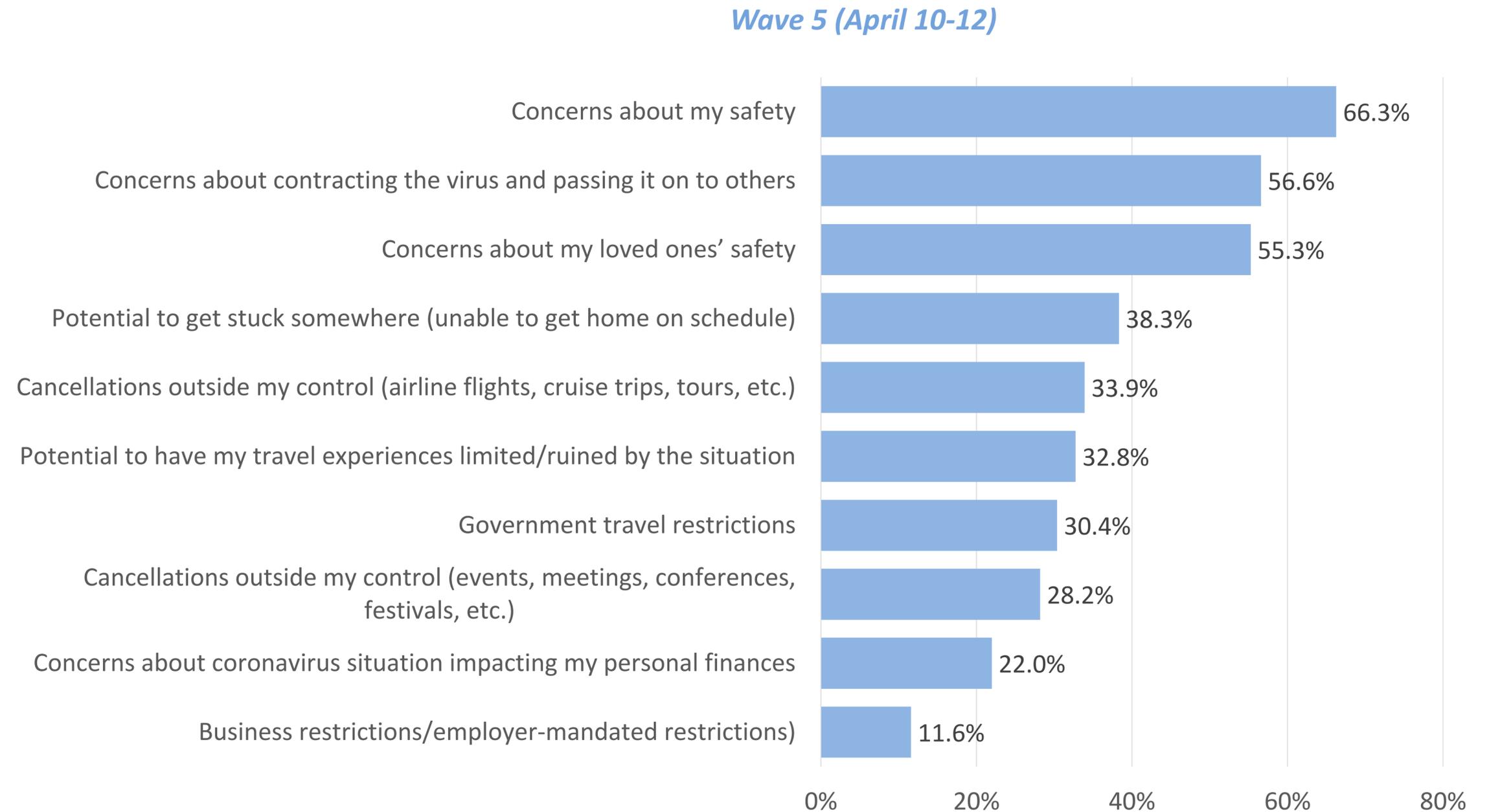
(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795, 890, and 937 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Why the Coronavirus is Impacting Travel

Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with two-thirds of respondents citing it as a reason (66.3%).

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

(Base: Respondents whose travel was impacted by the coronavirus, 935 completed surveys. Data collected April 10-12, 2020)



Why the Coronavirus is Impacting Travel (Detailed Changes)

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

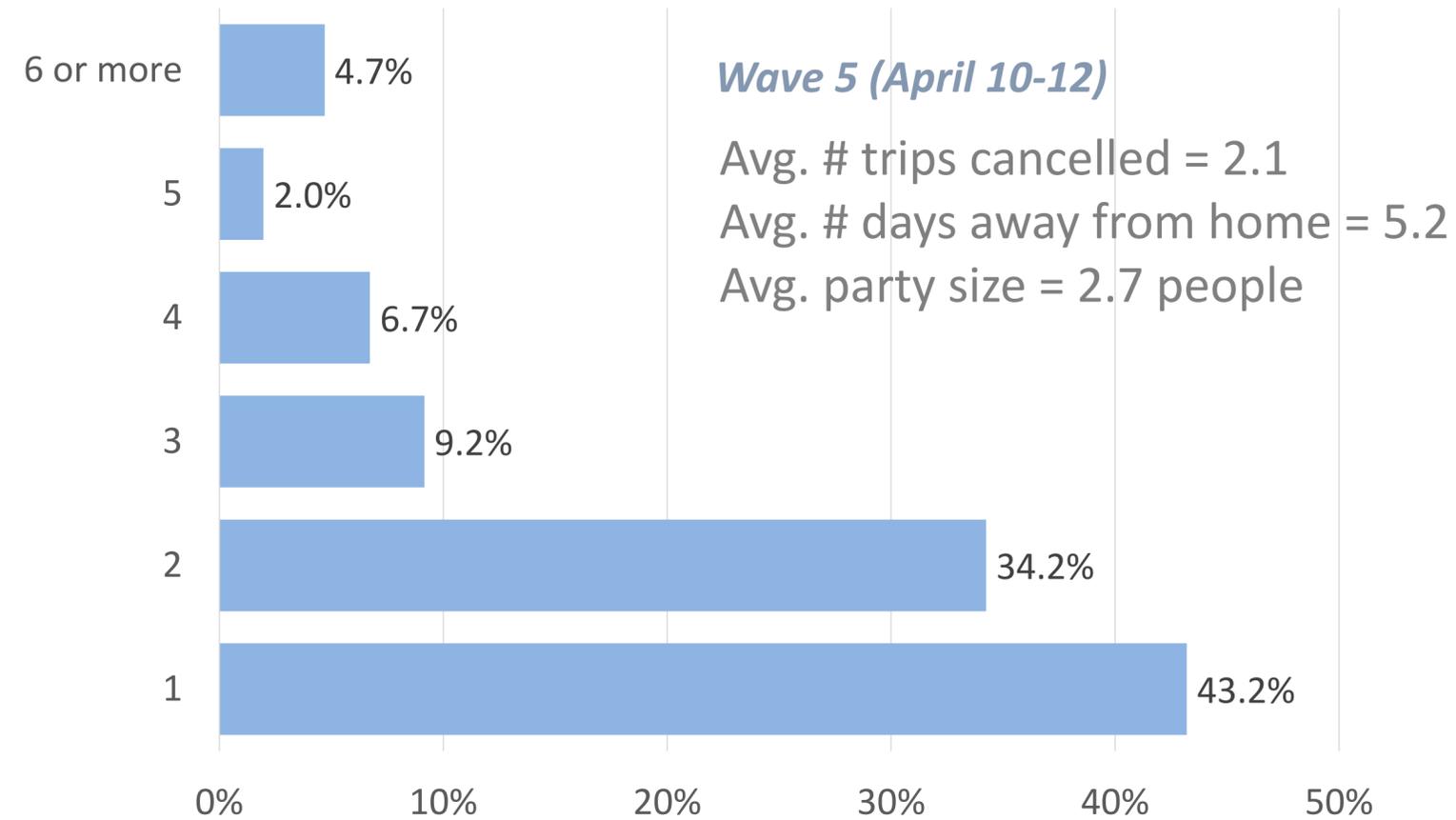
(Base: Respondents whose travel was impacted by the coronavirus, 552, 768, 792, 889 and 935 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, and 10-12, 2020)

	March 13-15	March 20-22	March 27-29	April 3-5	April 10-12	% CHNG (Waves 4-5)
Concerns about my safety	60.1%	62.8%	65.6%	65.8%	66.3%	0.7%
Concerns about contracting the virus and passing it on to others	60.8%	56.4%	64.0%	59.1%	56.6%	-4.3%
Concerns about my loved ones' safety	49.4%	52.4%	54.6%	51.1%	55.3%	8.2%
Potential to get stuck somewhere (unable to get home on schedule)	40.1%	42.4%	41.8%	41.3%	38.3%	-7.3%
Cancellations outside my control (airline flights, cruise trips, tours, etc.)	28.0%	32.9%	36.7%	35.4%	33.9%	-4.1%
Potential to have my travel experiences limited/ruined by the situation	30.2%	37.0%	36.7%	34.4%	32.8%	-4.7%
Government travel restrictions	16.9%	30.6%	30.6%	32.5%	30.4%	-6.6%
Cancellations outside my control (events, meetings, conferences, festivals, etc.)	23.1%	27.4%	23.4%	23.9%	28.2%	17.7%
Concerns about coronavirus situation impacting my personal finances	15.0%	23.0%	22.7%	24.2%	22.0%	-9.1%
Business restrictions/employer-mandated restrictions)	6.8%	8.8%	9.4%	9.0%	11.6%	29.5%
Base	552	768	792	889	935	

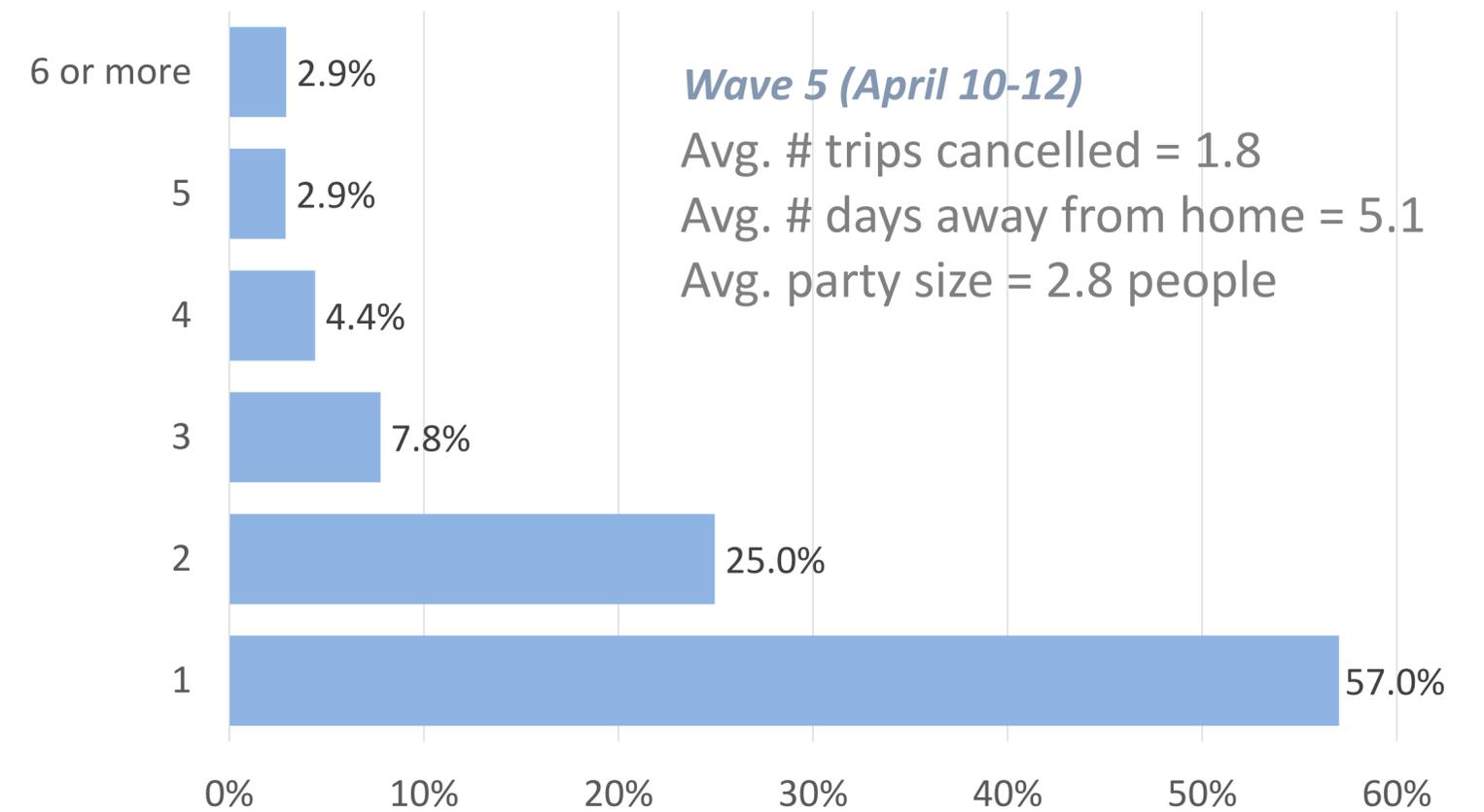
Trips Cancelled/Postponed

The average American traveler says they have cancelled 2.1 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.8 trips due to the crisis.

Question: How many trips did you cancel?



Question: How many trips did you postpone?



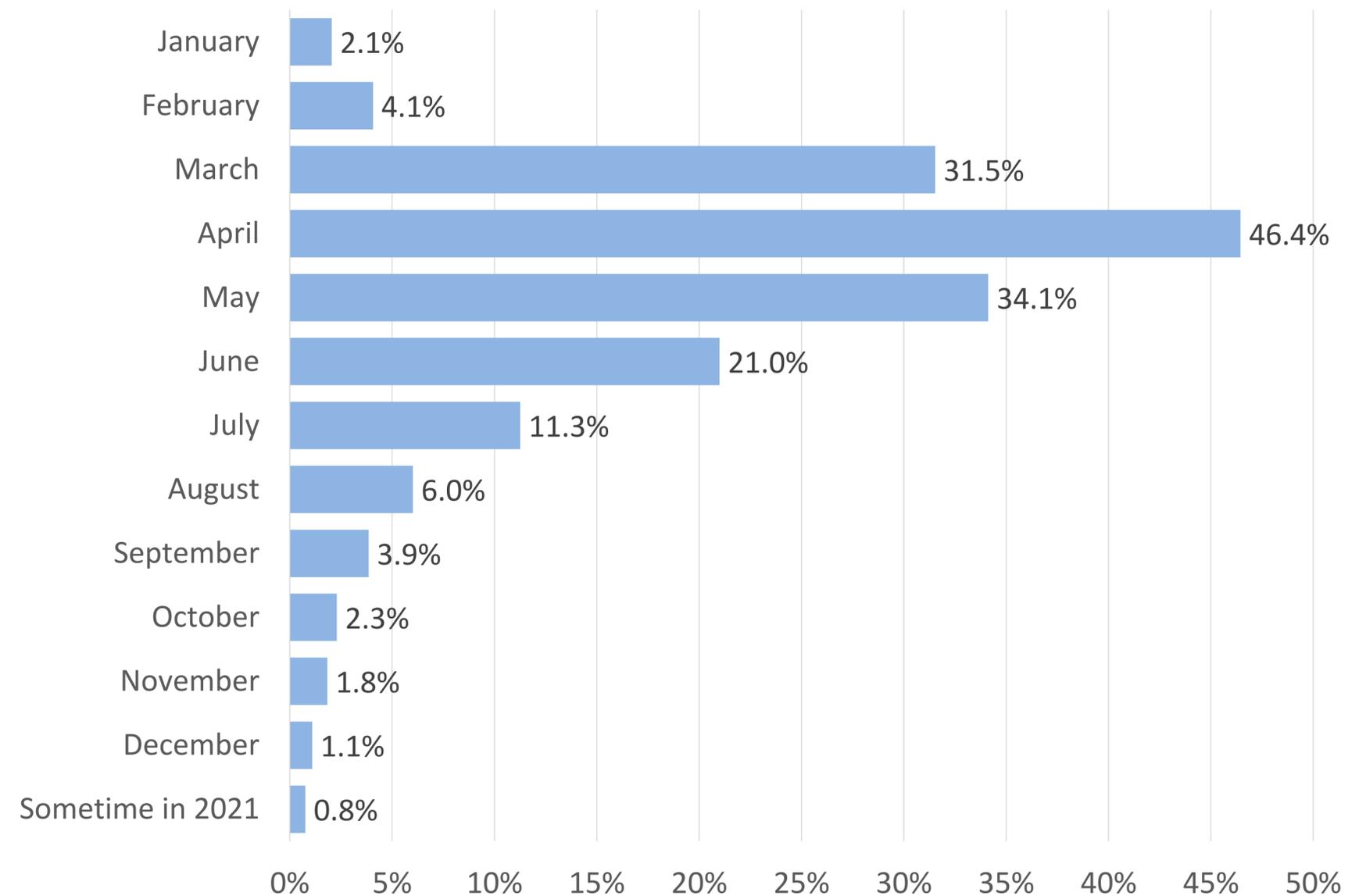
(Base: Respondents cancelling/postponing a trip, 624/440 completed surveys. Data collected April 10-12, 2020)

Month of Trip Cancellation

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

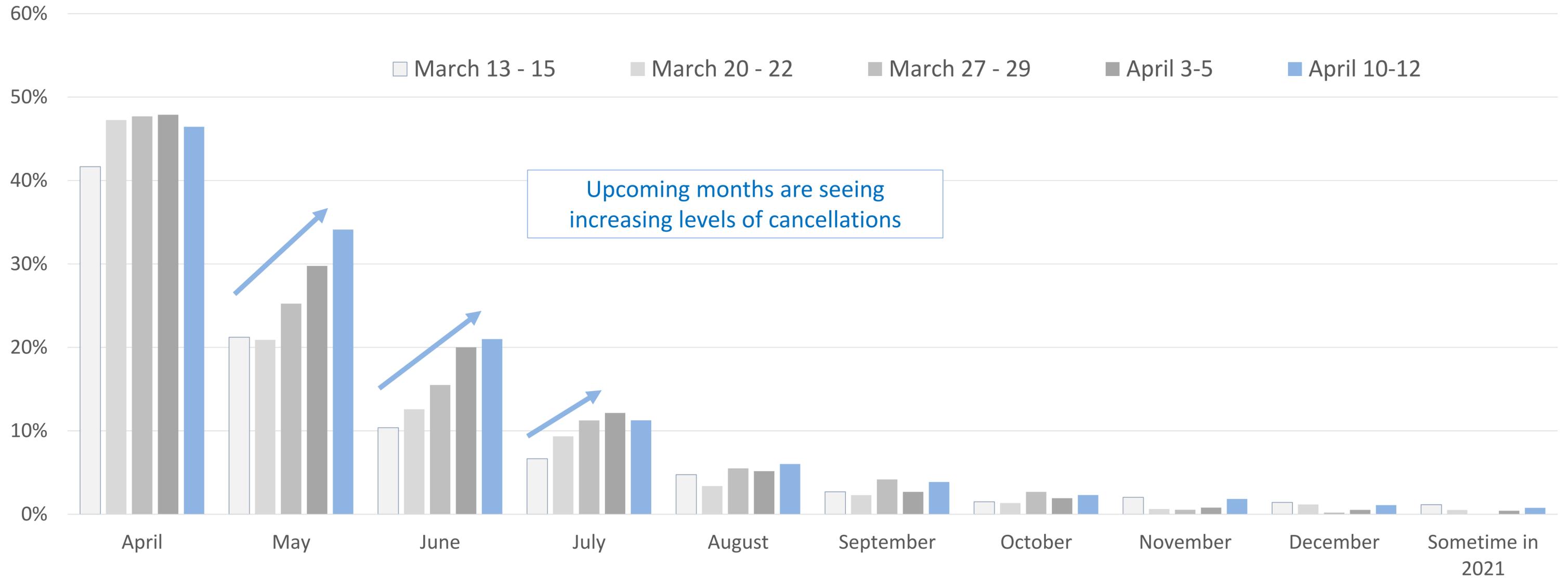
*(Base: Cancelling trips, 624 completed surveys.
Data collected April 10-12, 2020)*

A majority of travel cancellations appear to be near-term bookings. In this survey wave, there are continued increases in the cancellation of May, 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)

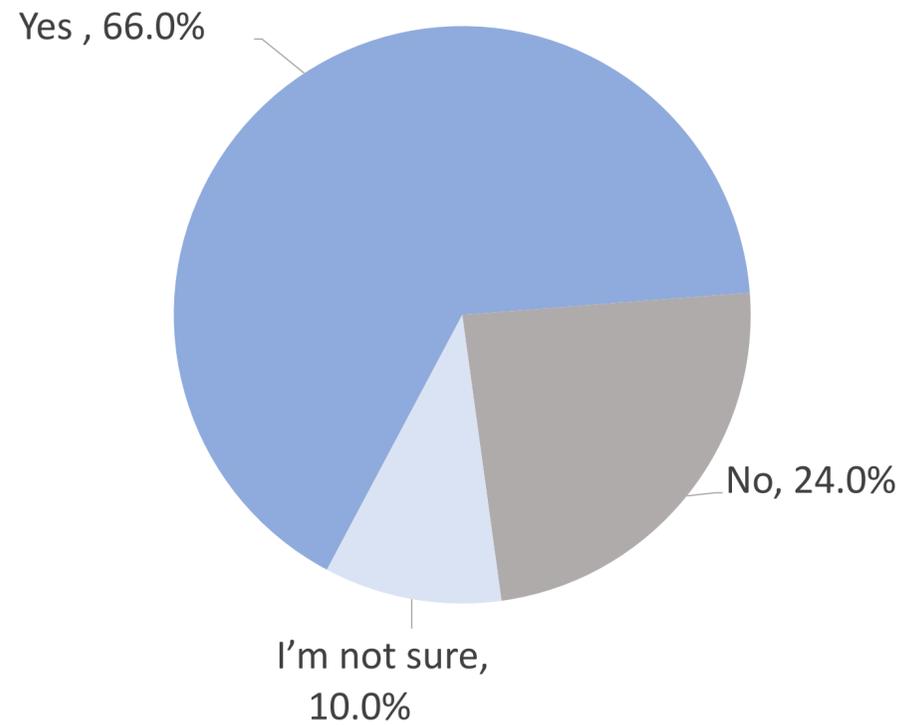


(Base: Cancelling trips, 292, 477, 506, 580 and 623 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 2020. Note: Data purposefully excluded from this chart for readability.)

Did Traveler Get Full Refunds?

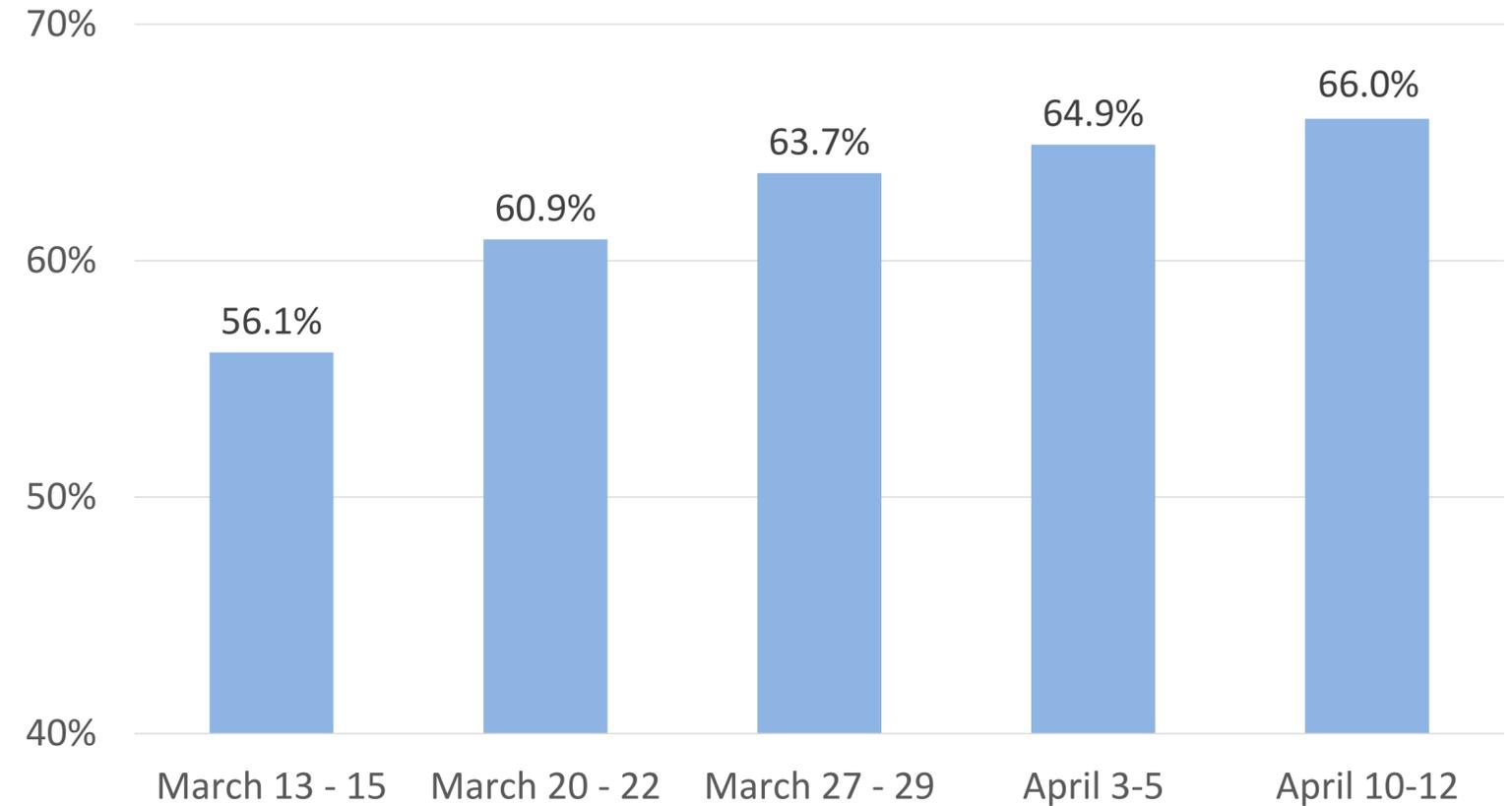
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 5 (April 10-12)



(Base: Respondents cancelling a trip, 624 completed surveys. Data collected April 10-12, 2020)

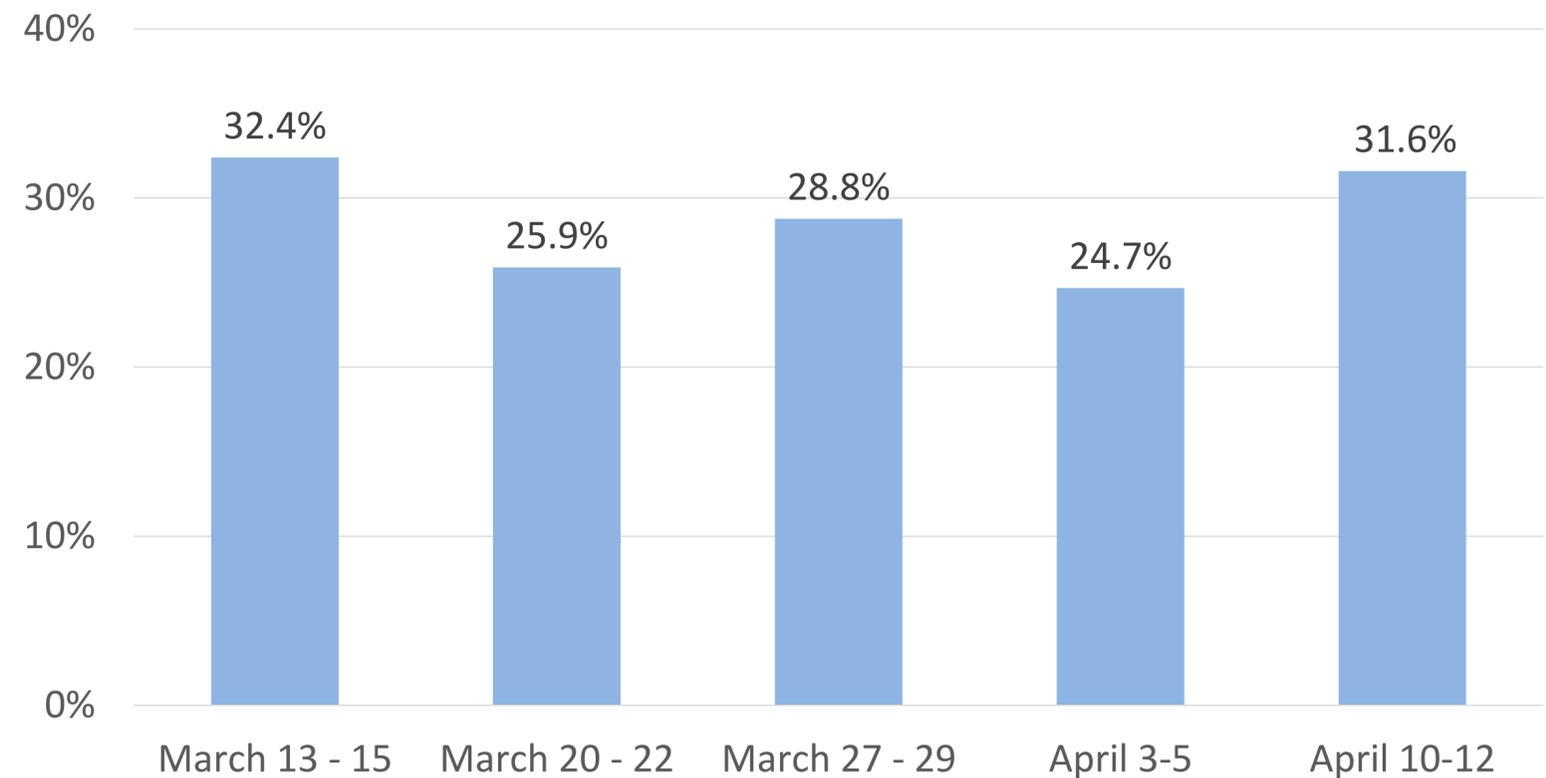
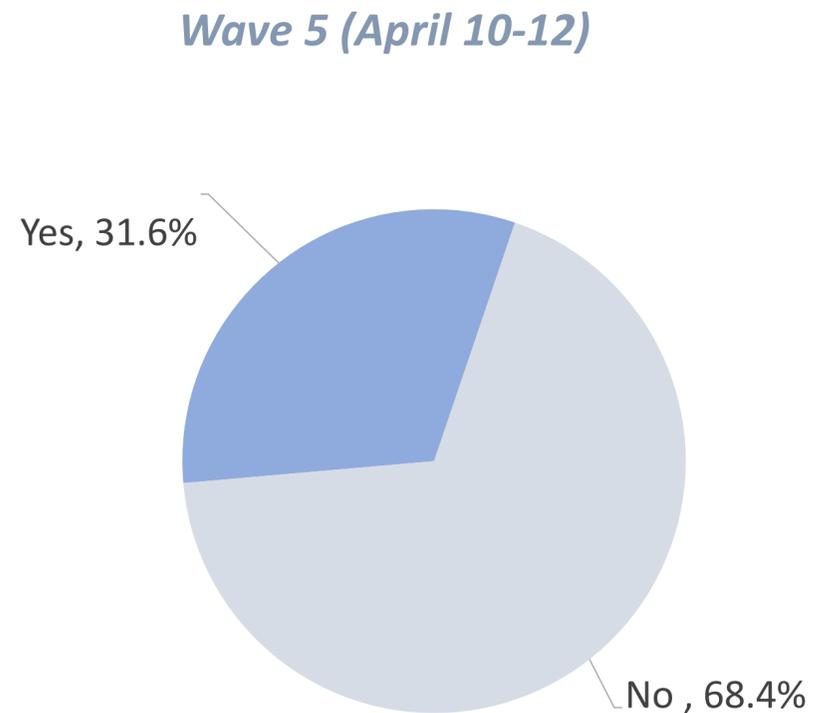
Increases in the proportion of travelers being fully refunded for cancelled trips has slowed. This week, 66.0 percent report receiving full refunds, compared to 64.9 percent last week.



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?

Approximately 7-in-10 American travelers who have postponed a trip due to the pandemic have not yet rescheduled it.

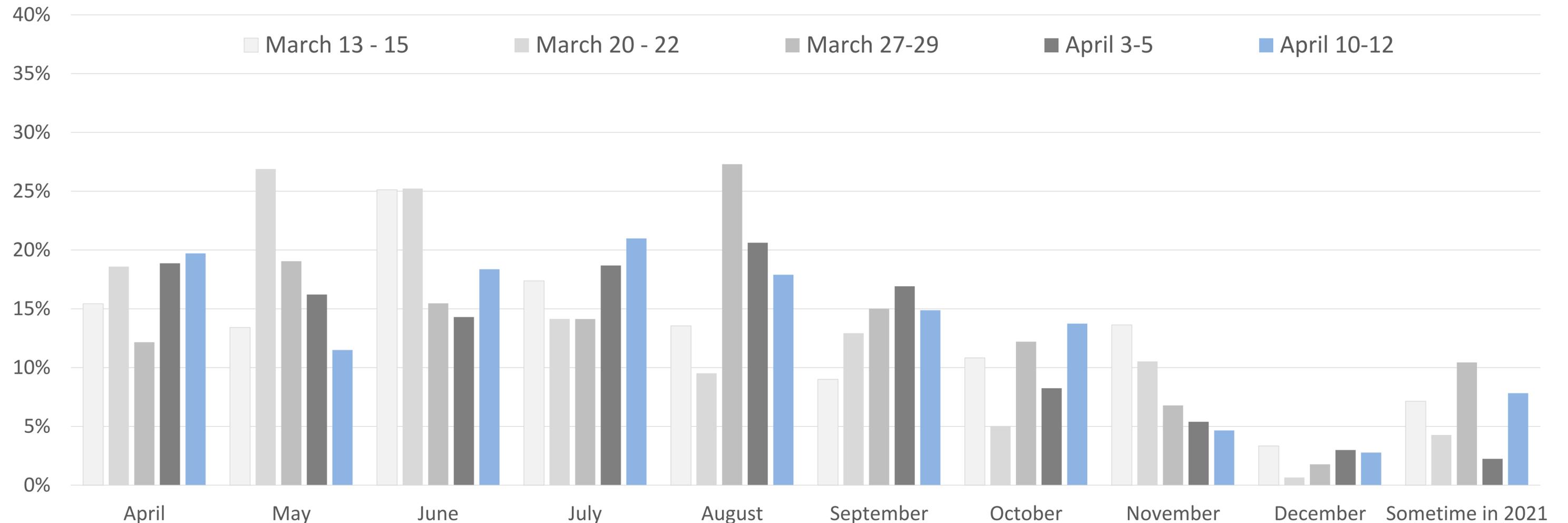


(Base: Postponing trips, 277, 354, 404, 433, 435 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Month Postponed Trips Rescheduled

Postponements are appearing to be spread across the summer months. Looking at the remaining months of the year, there is a significant increase in the percent of Americans postponing their trips to October.

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

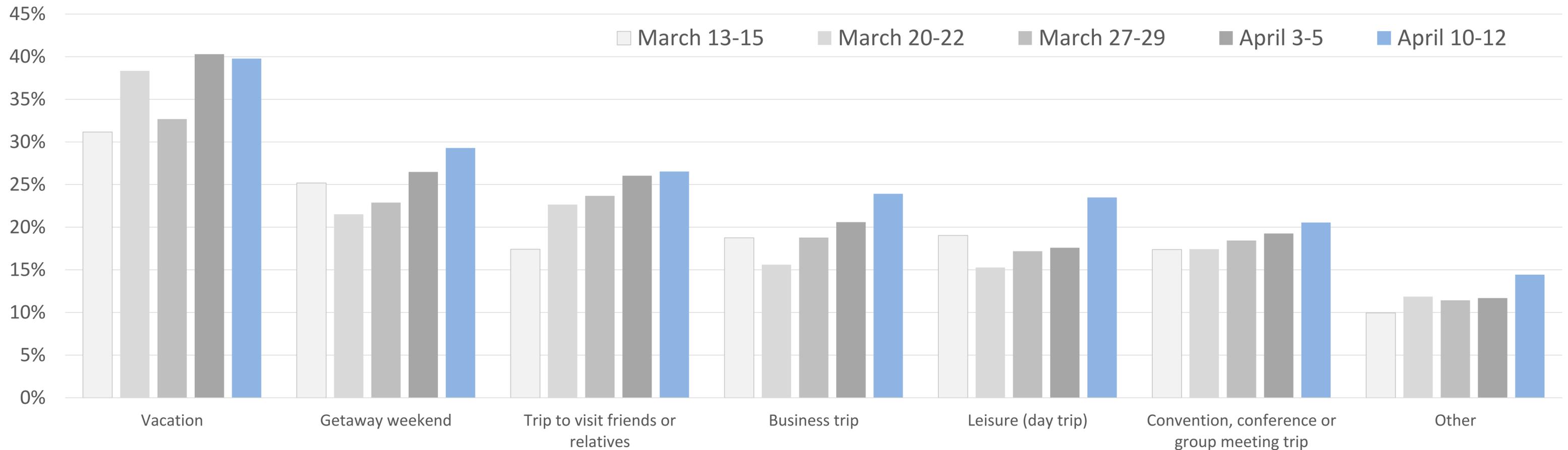


(Base: Postponing trips rescheduled, 99,86, 120, 107 and 132 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12 2020)

Types of Trips Cancelled

Over the course of the month, we have seen increases in the proportion of travelers cancelling all types of trips.

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

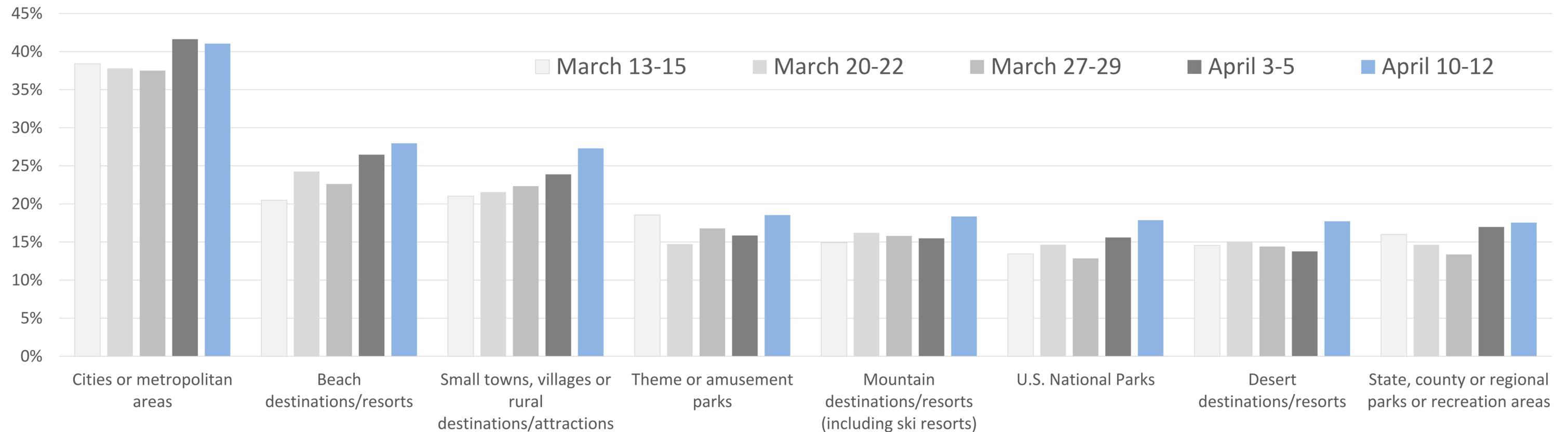


(Base: Cancelling trips, 292, 477, 506, 580, 624 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Types of Destinations Cancelled

Again, in this wave there were no major changes in the types of destinations being cancelled. However, in this fifth survey wave, it appears that beach destinations/resorts and small towns have seen increases 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)

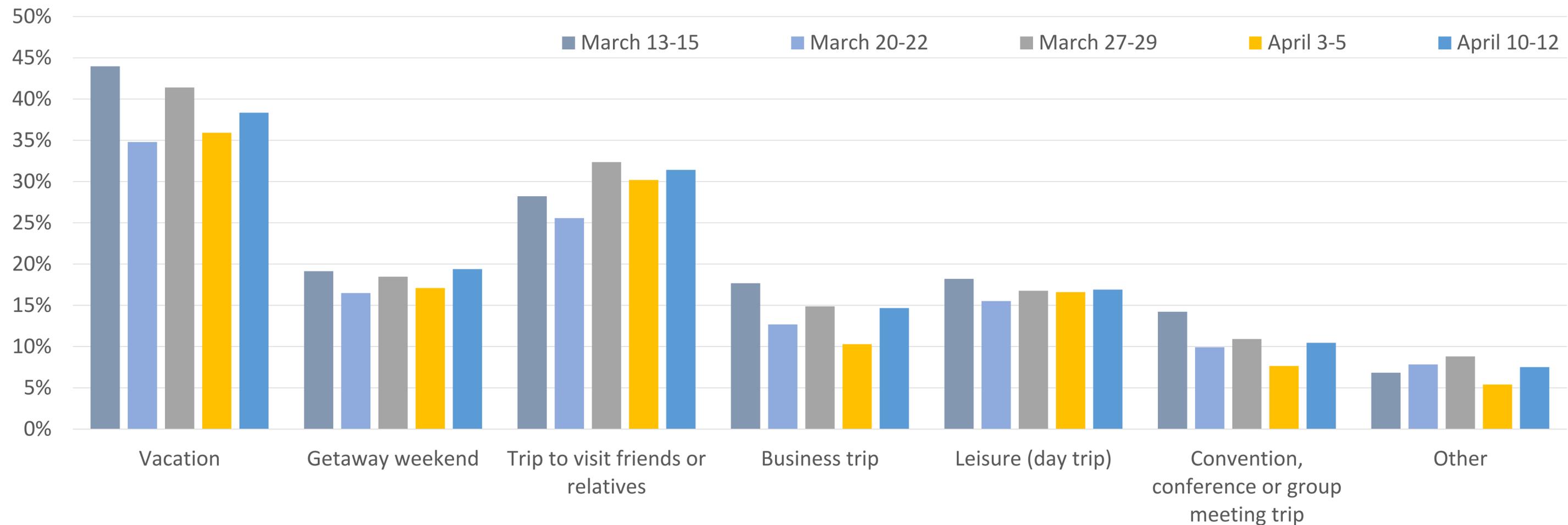


(Base: Cancelling trips, 292, 477, 506, 580, 624 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Types of Trips Postponed

This week, postponements of vacations, weekend getaways, business trips and leisure day trips have increased.

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

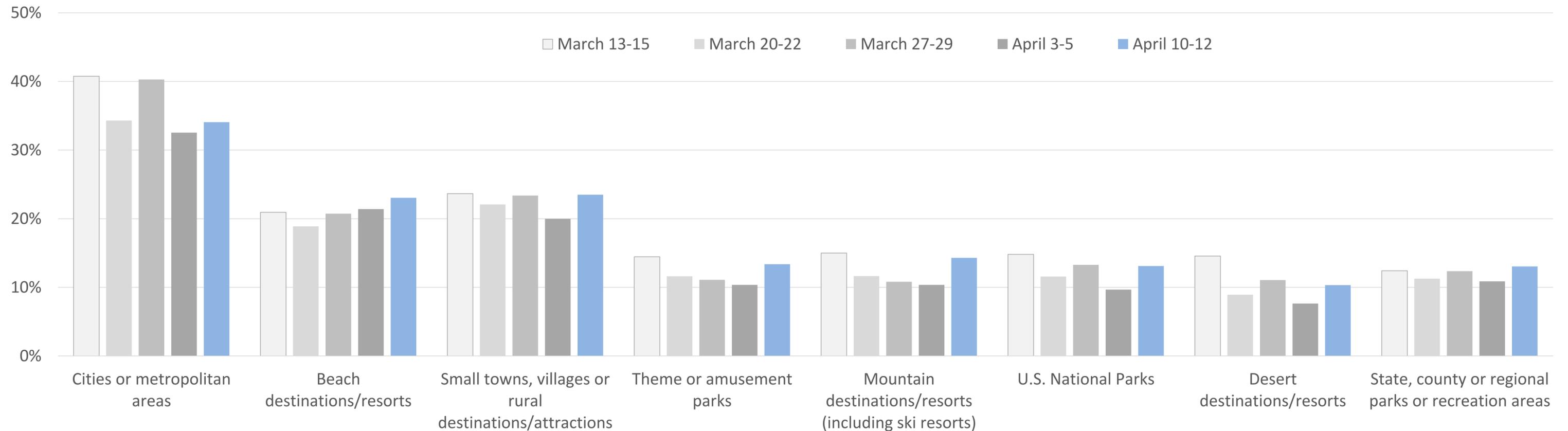


(Base: Postponing trips, 277, 354, 404, 435 and 440 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Types of Destinations Postponed

Urban areas are still the most postponed destination type.

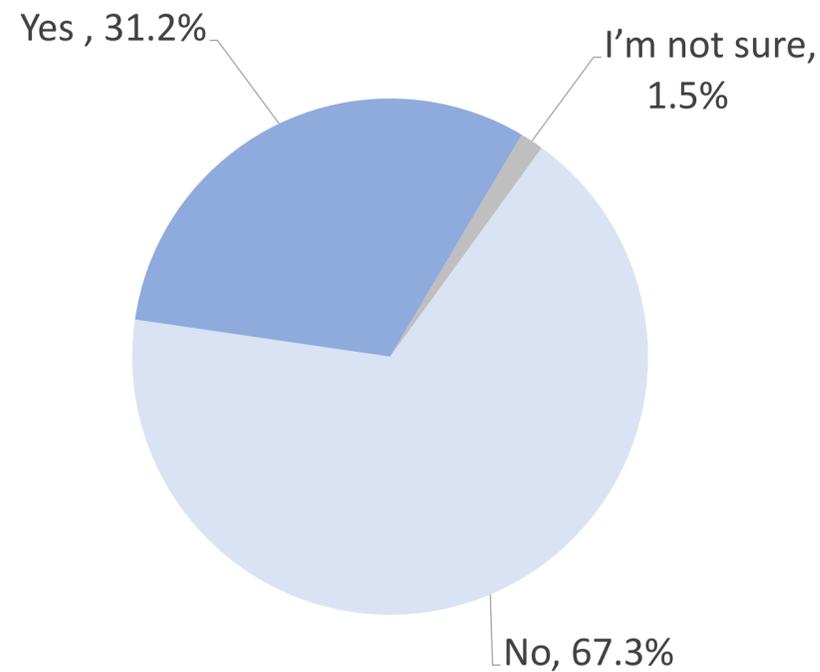
Question: Thinking about these postponed trips, which destination types were you planning to visit but ended up postponing?
(Select all that apply)



(Base: Postponing trips, 277, 354, 404, 435 and 440 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

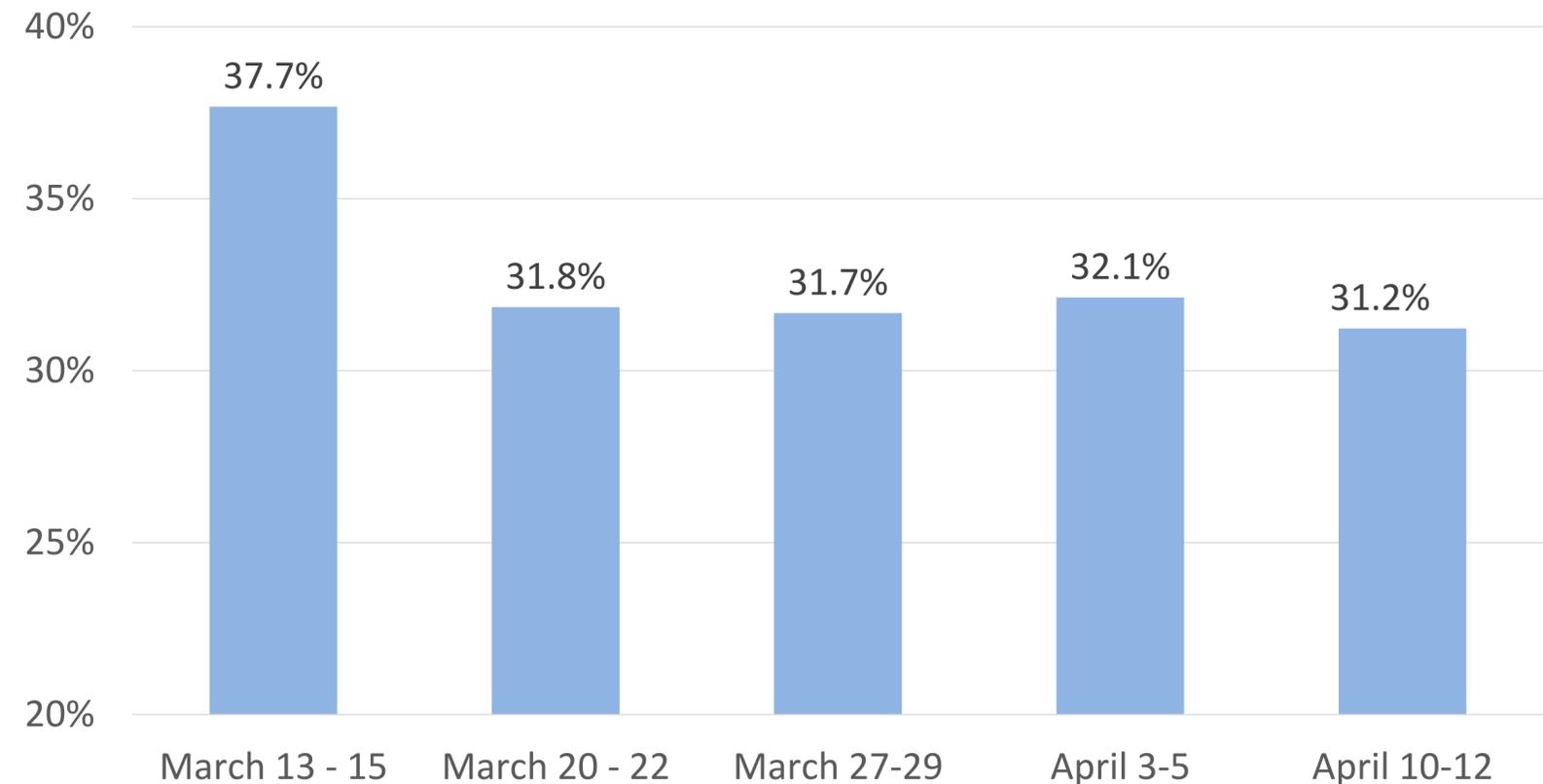
International Trips Postponed or Cancelled

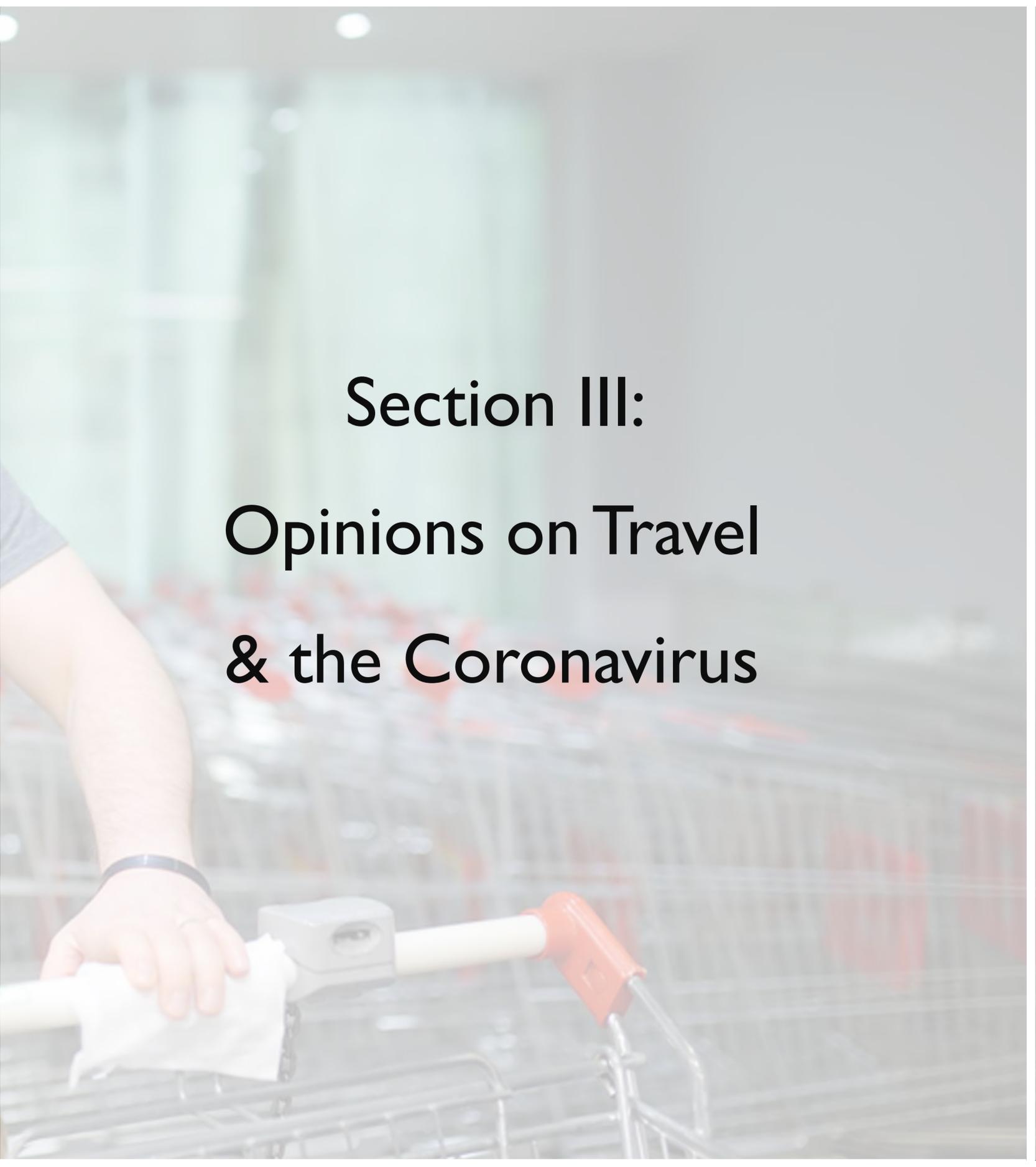
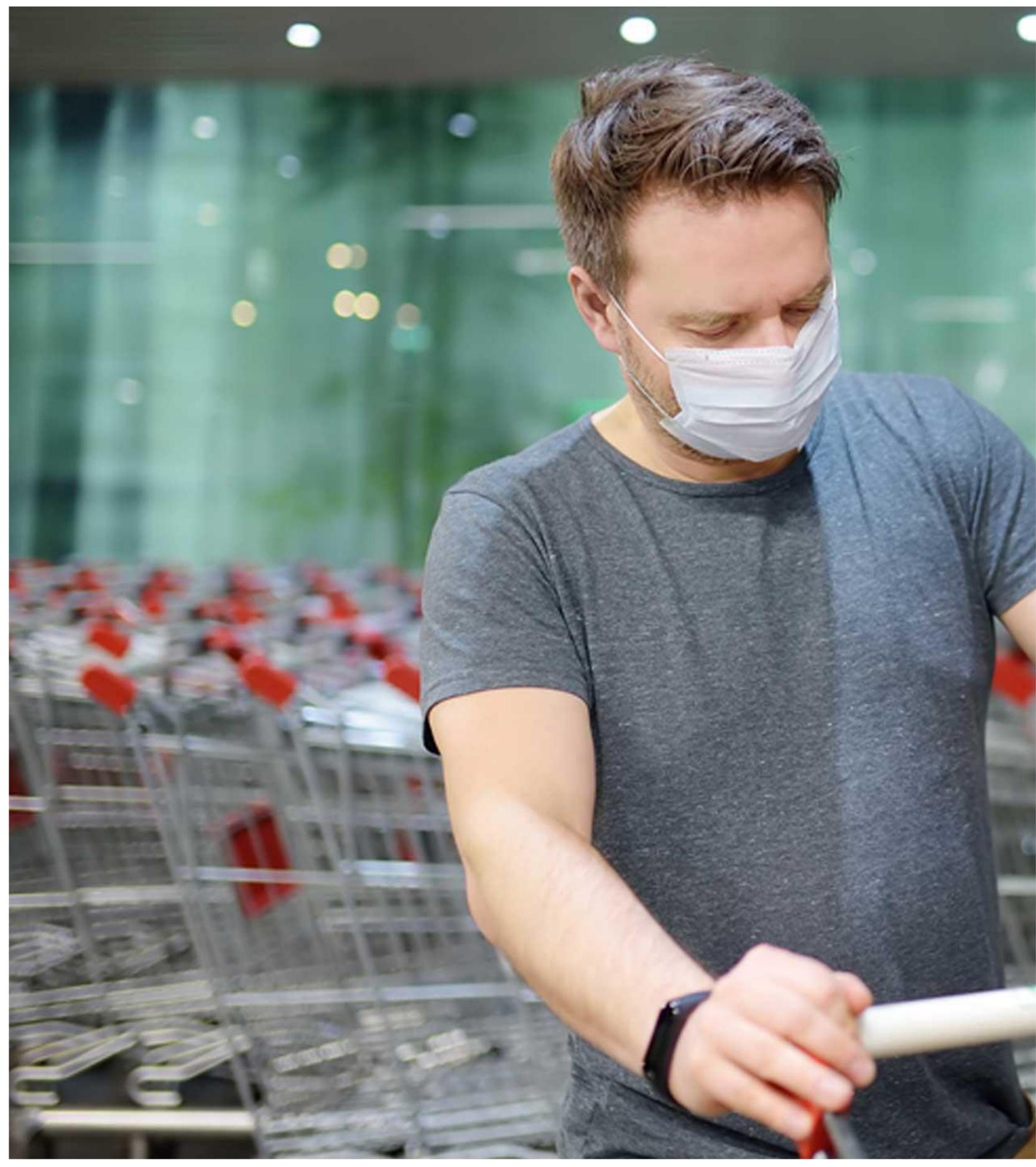
Question: Were any of the trips you canceled or postponed foreign trips (i.e., travel to countries outside the United States)?



(Base: Respondents cancelling or postponing a trip, 937 completed surveys. Data collected April 10-12, 2020)

Almost one-third (31.2%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure has remained stable over the past four survey waves.





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

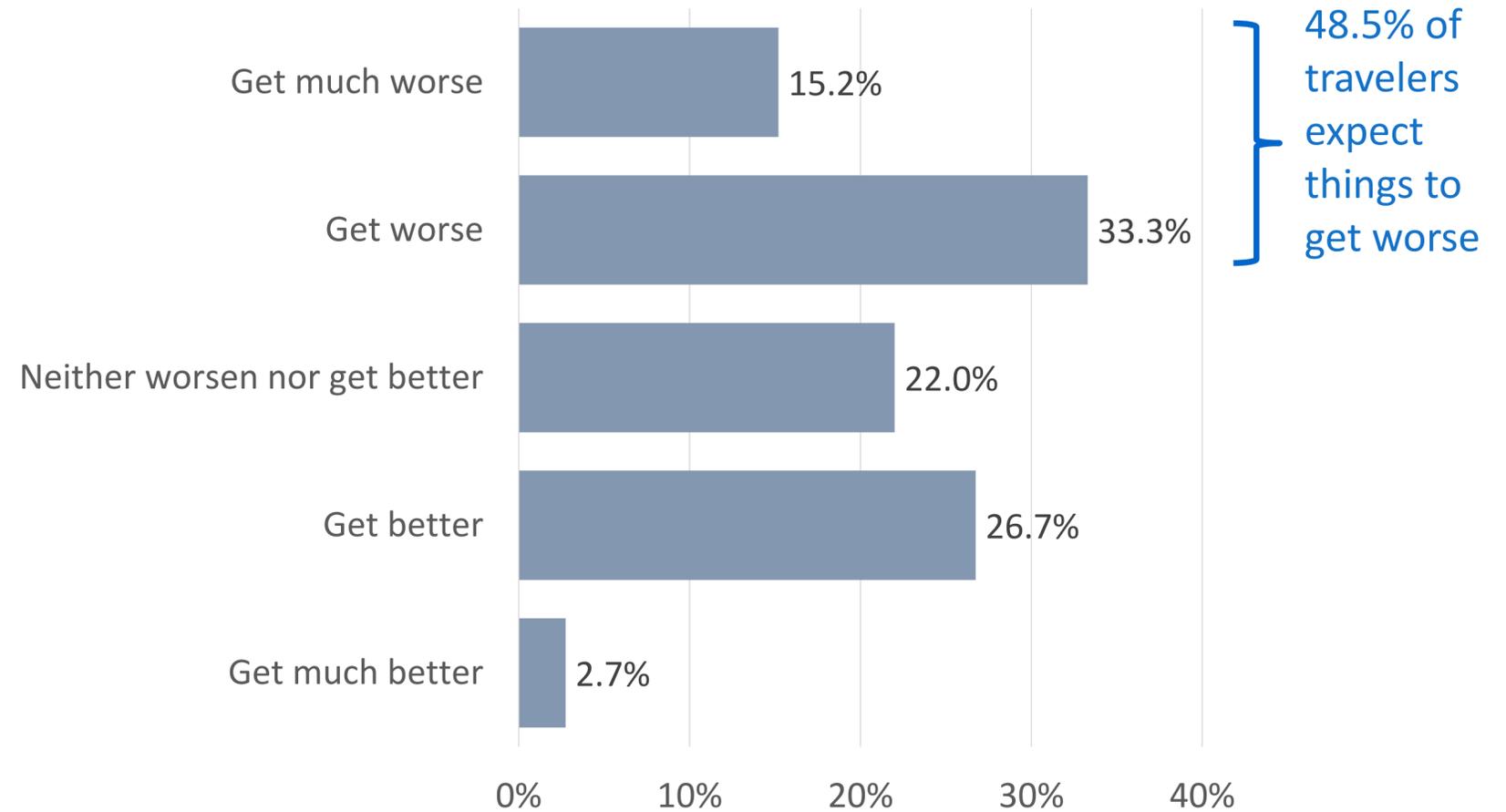
Expectations for the Coronavirus Outbreak

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

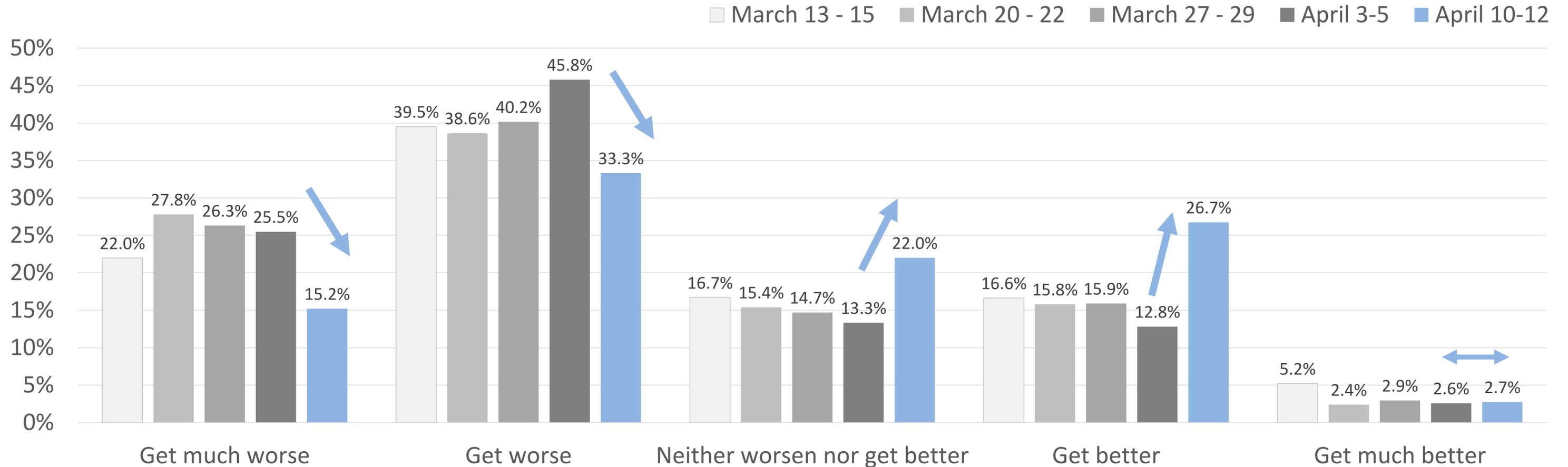
In a major change this week, far fewer travelers feel the situation will get worse in the next month. This week, only 48.5 percent expect the coronavirus situation to get worse in the next month, down sharply from 71.3 percent last week.



Expectations for the Coronavirus Outbreak

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____



(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

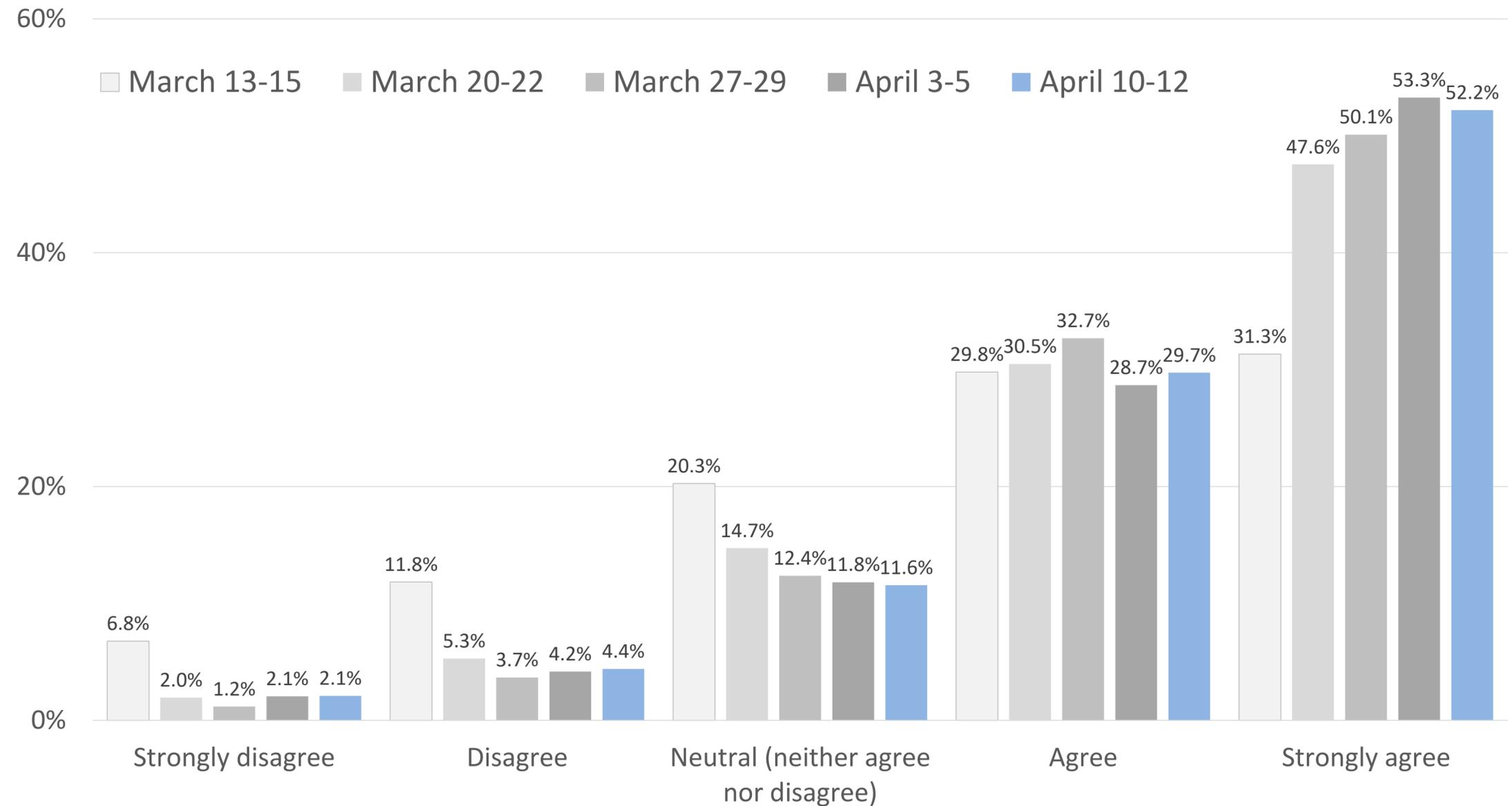
Avoiding Travel Until the Crisis Blows Over

Currently, traveler sentiment is still against travel. 8-in-10 American travelers say they are done traveling until the coronavirus situation blows over. More than half (52.2%) 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



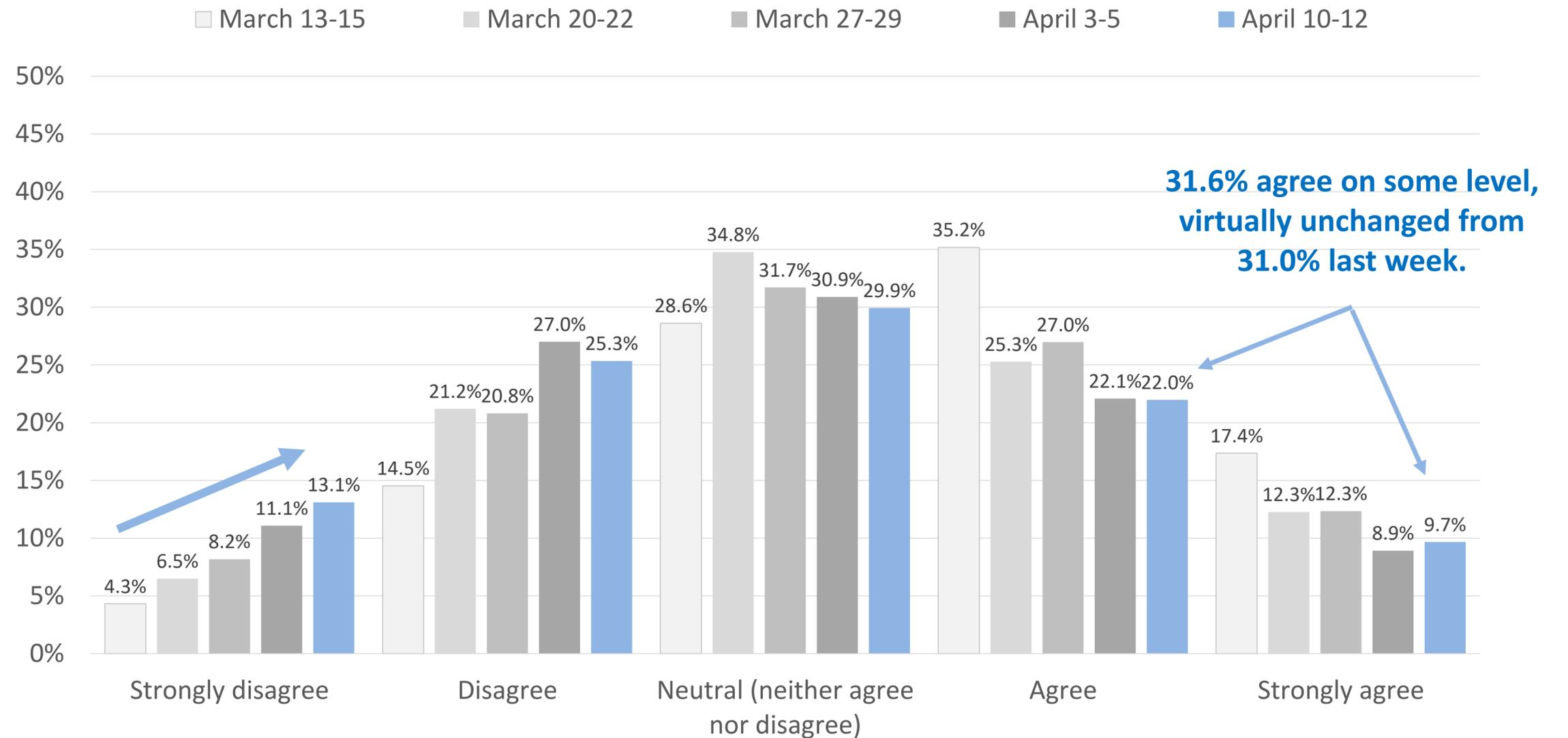
Expectations for Summer Travel Season

Travelers are still mixed on whether the coronavirus situation will be resolved by the summer travel season. Similar proportions agree and disagree that the situation will be resolved by summer.

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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



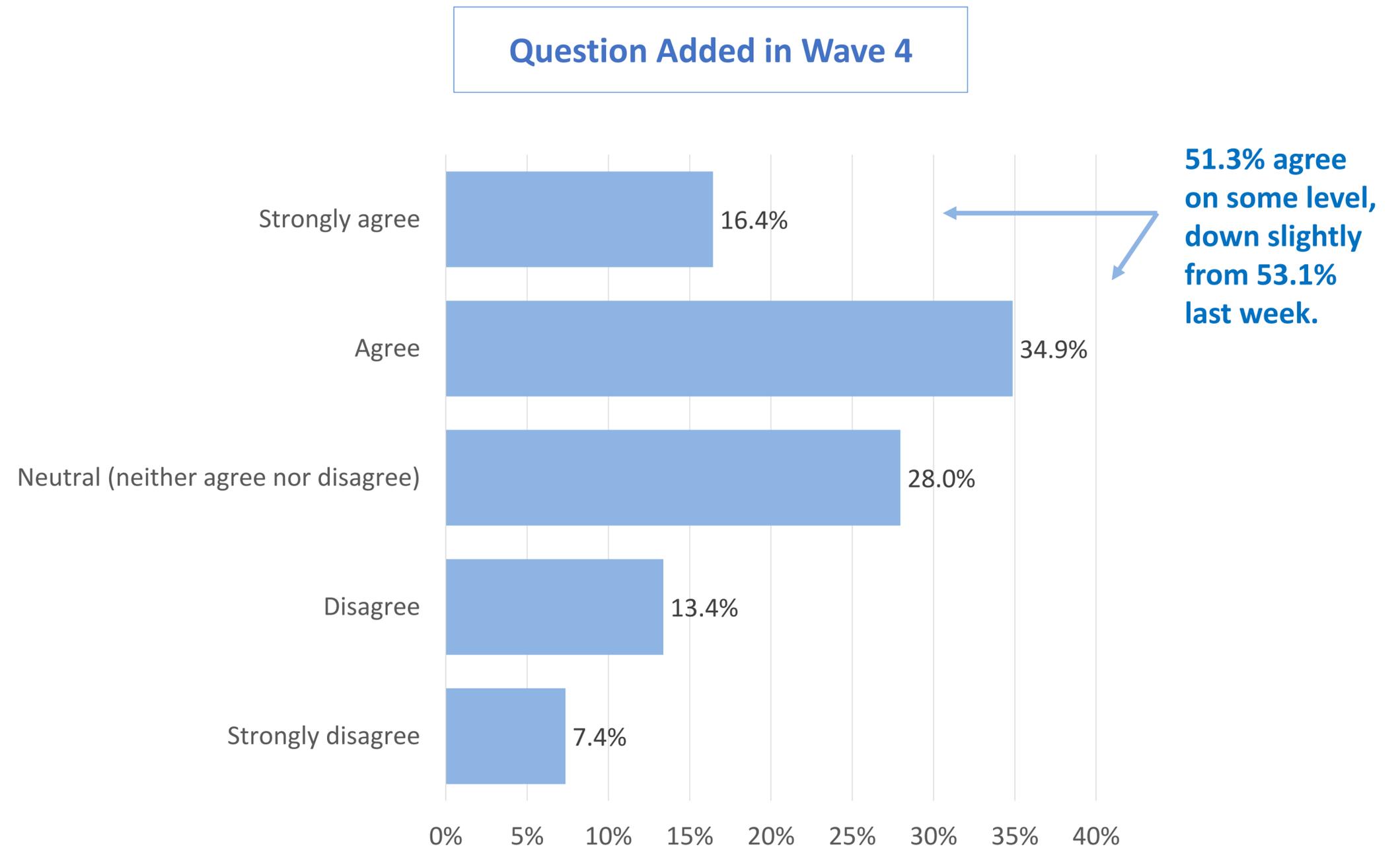
Expectations for Fall Travel Season

About one-half of American travelers (51.3%) expect to be back traveling this Fall. Only 20.7 percent disagree, up from 16.4 percent last week.

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 and 1,263 completed surveys. Data collected April 3-5 and 10-12, 2020)



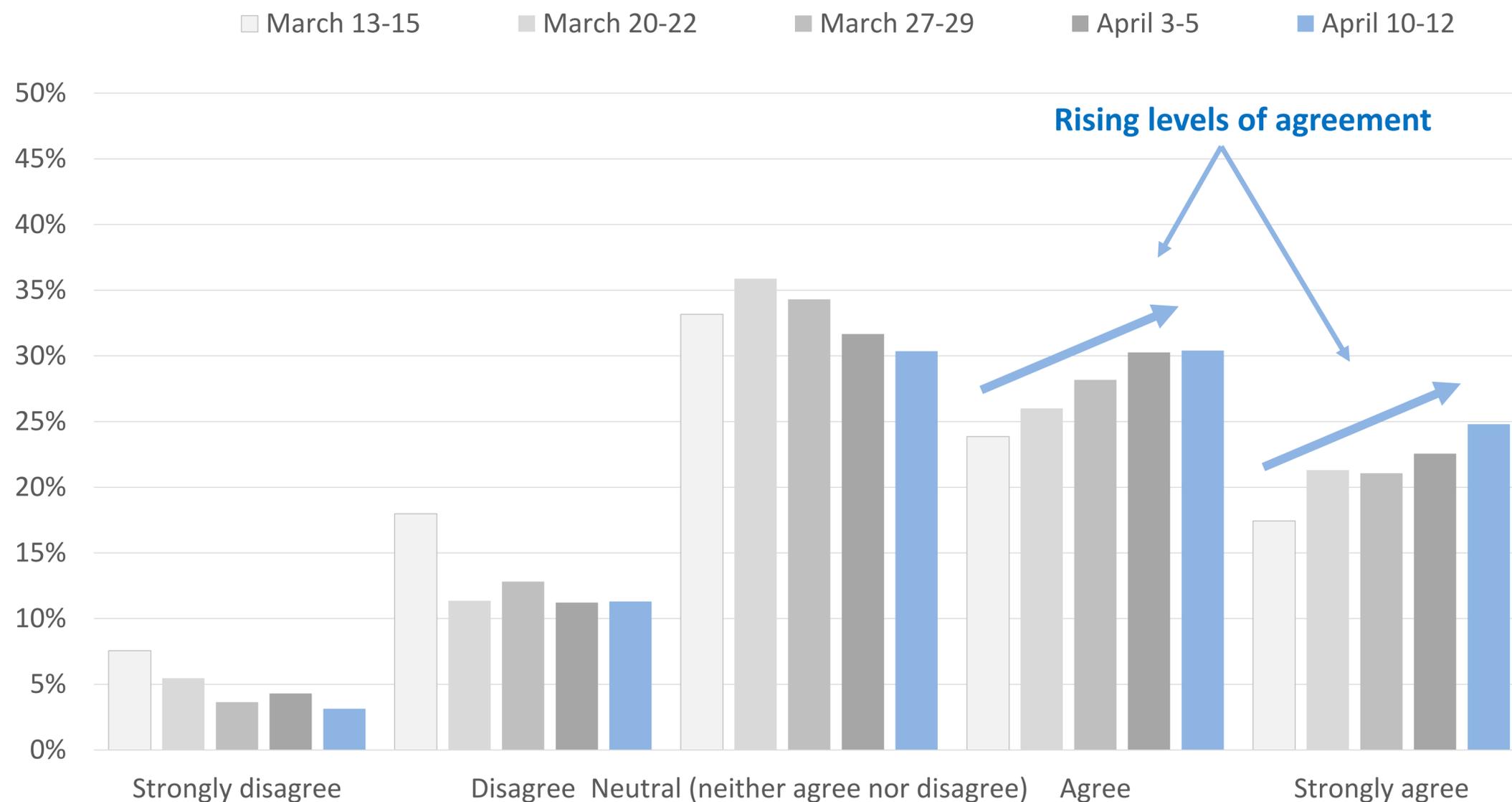
Staycations as a Replacement for Vacations

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 55.2 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



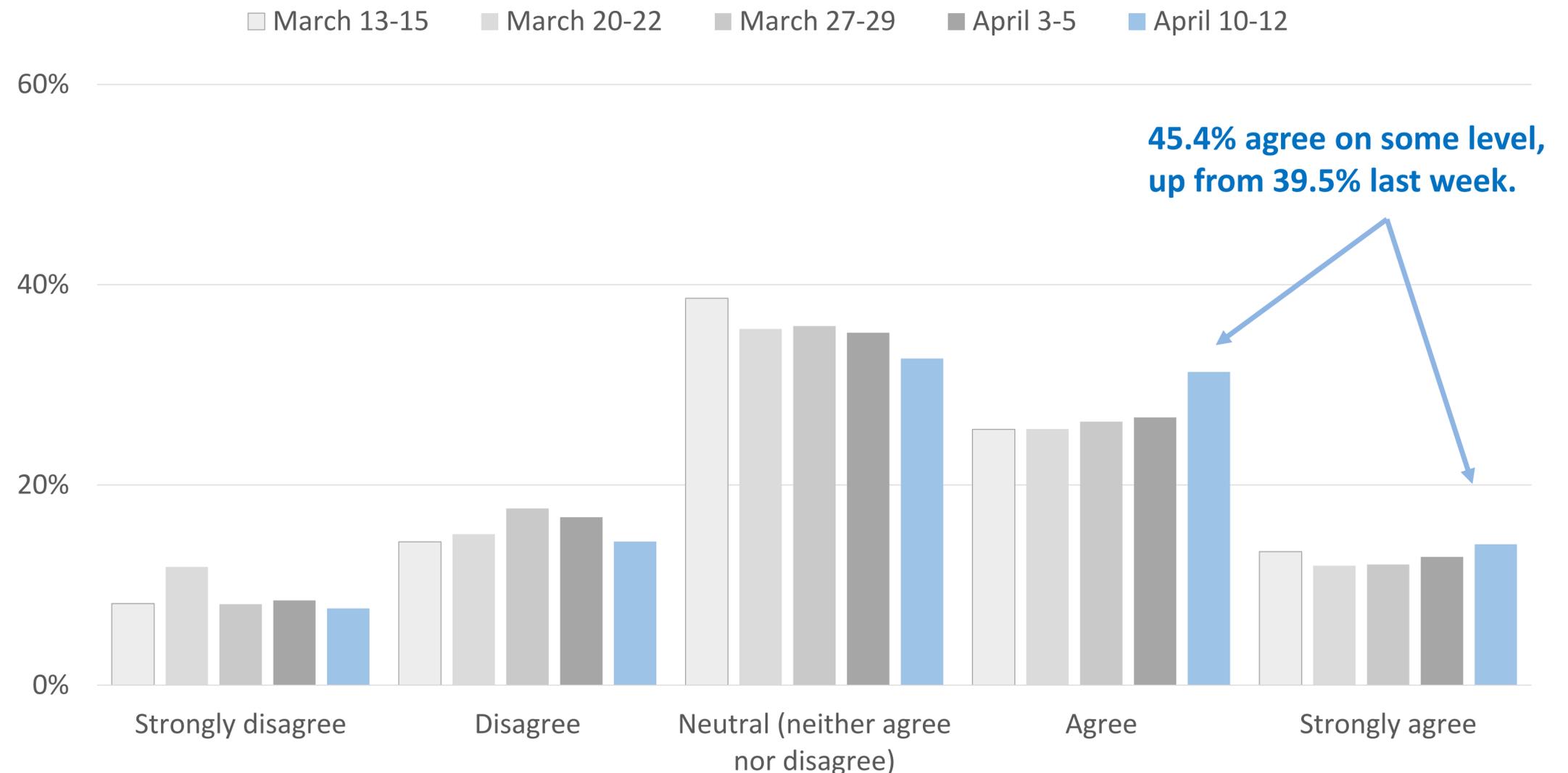
Replacing Air Travel With Road Trips

Car travel may displace some air travel this year, with 45.4 percent of American travelers saying they may avoid airlines and instead travel by car. This metric increased by 6 percentage points this 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



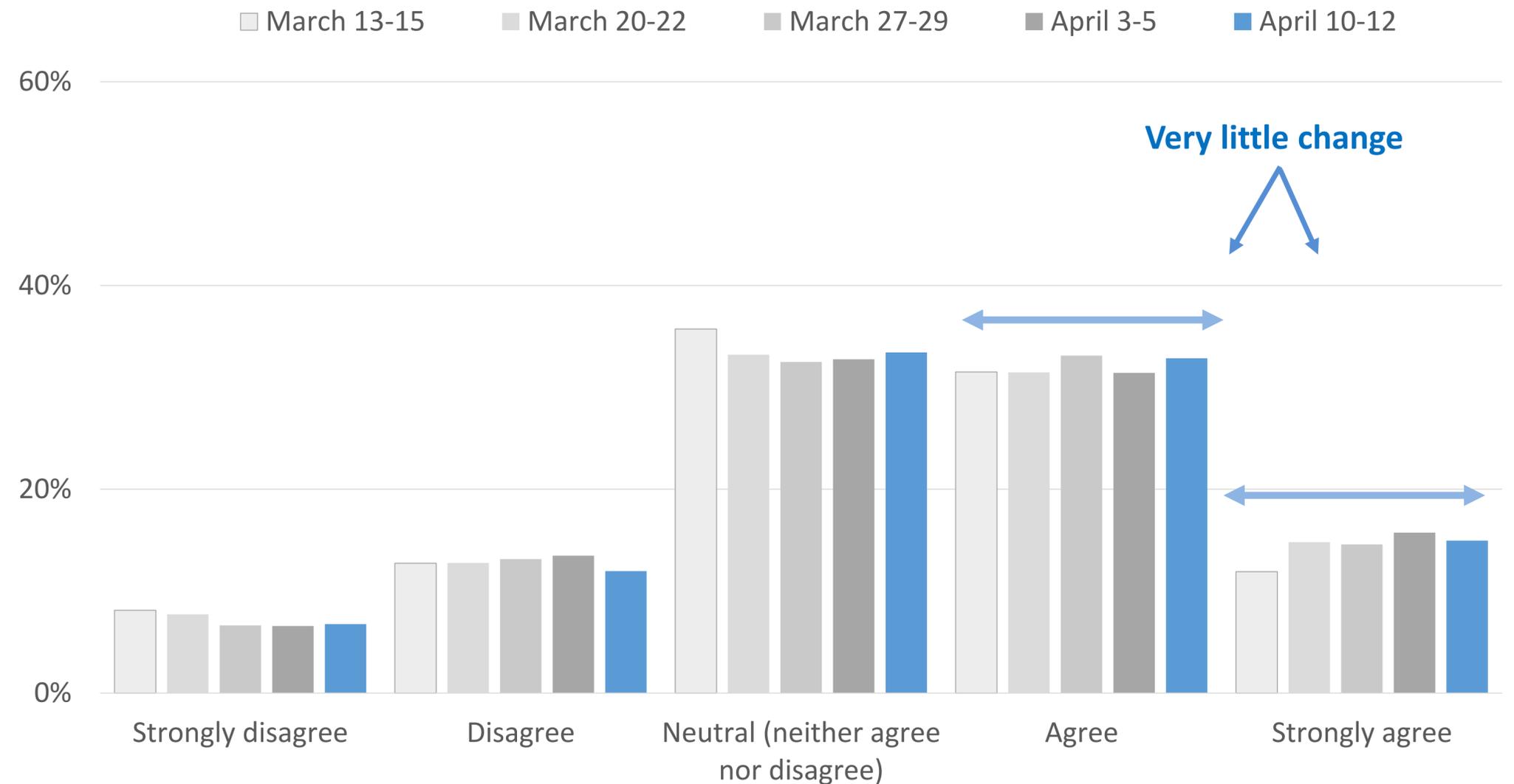
Replacing Long-Haul Travel with Regional Trips

Similarly, 47.8 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 five 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



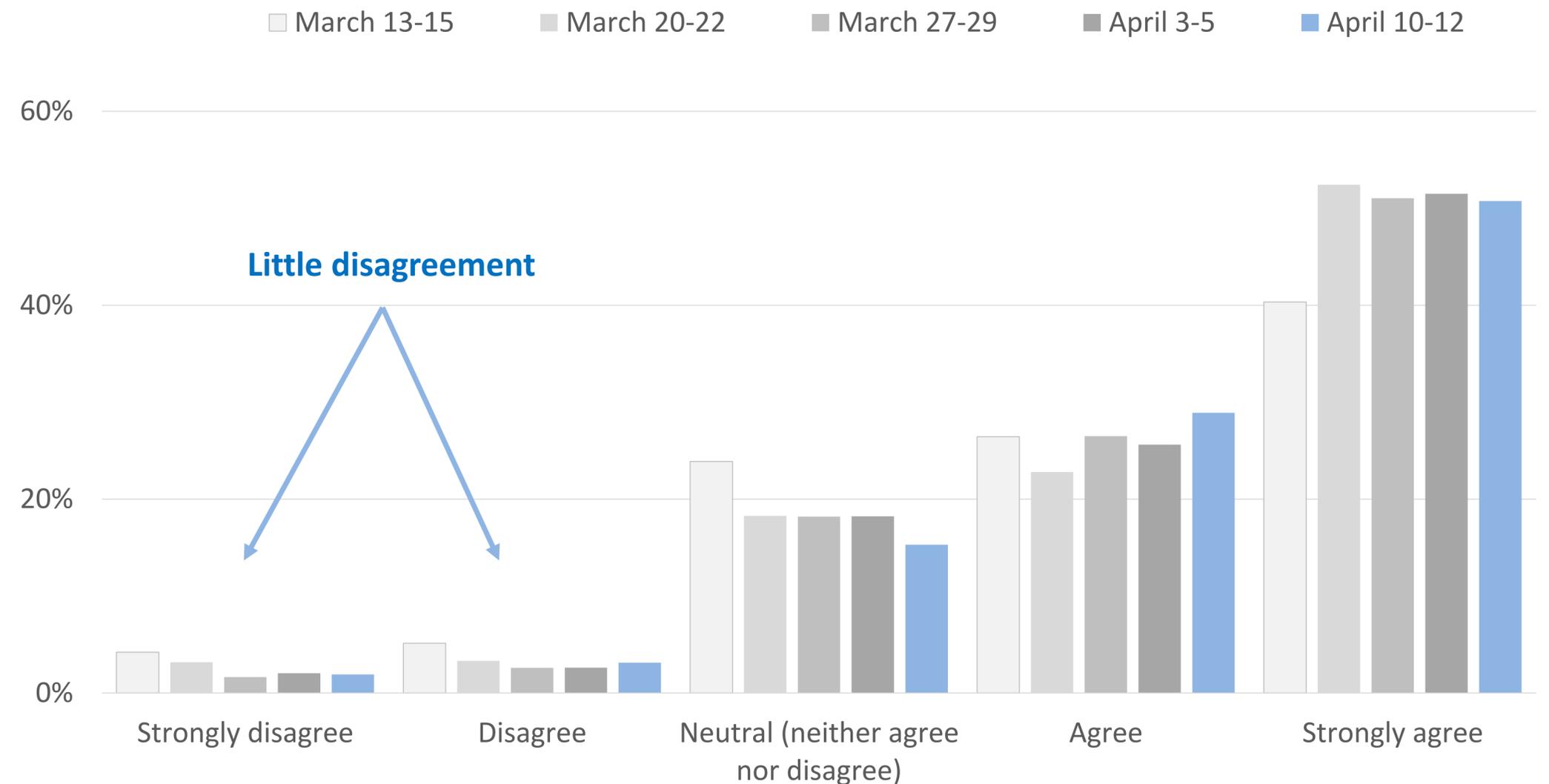
Avoiding Conventions & Conferences

Trust that attending meetings in the current environment remains low. As was the case last week, nearly 8-in-10 travelers (79.7%) 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



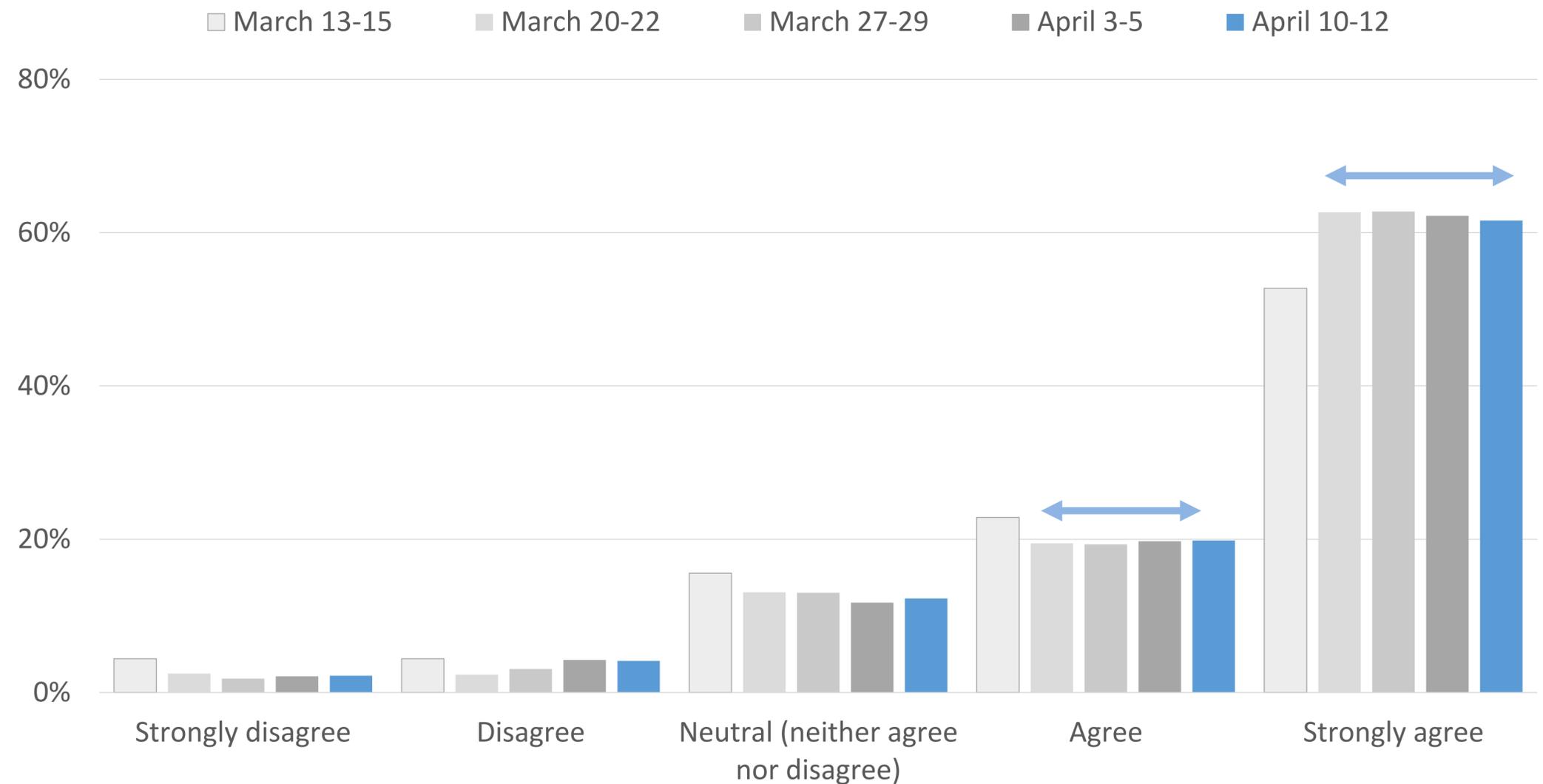
Avoiding International Travel

Unchanged from last week, 4-in-5 American travelers (81.4%) 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



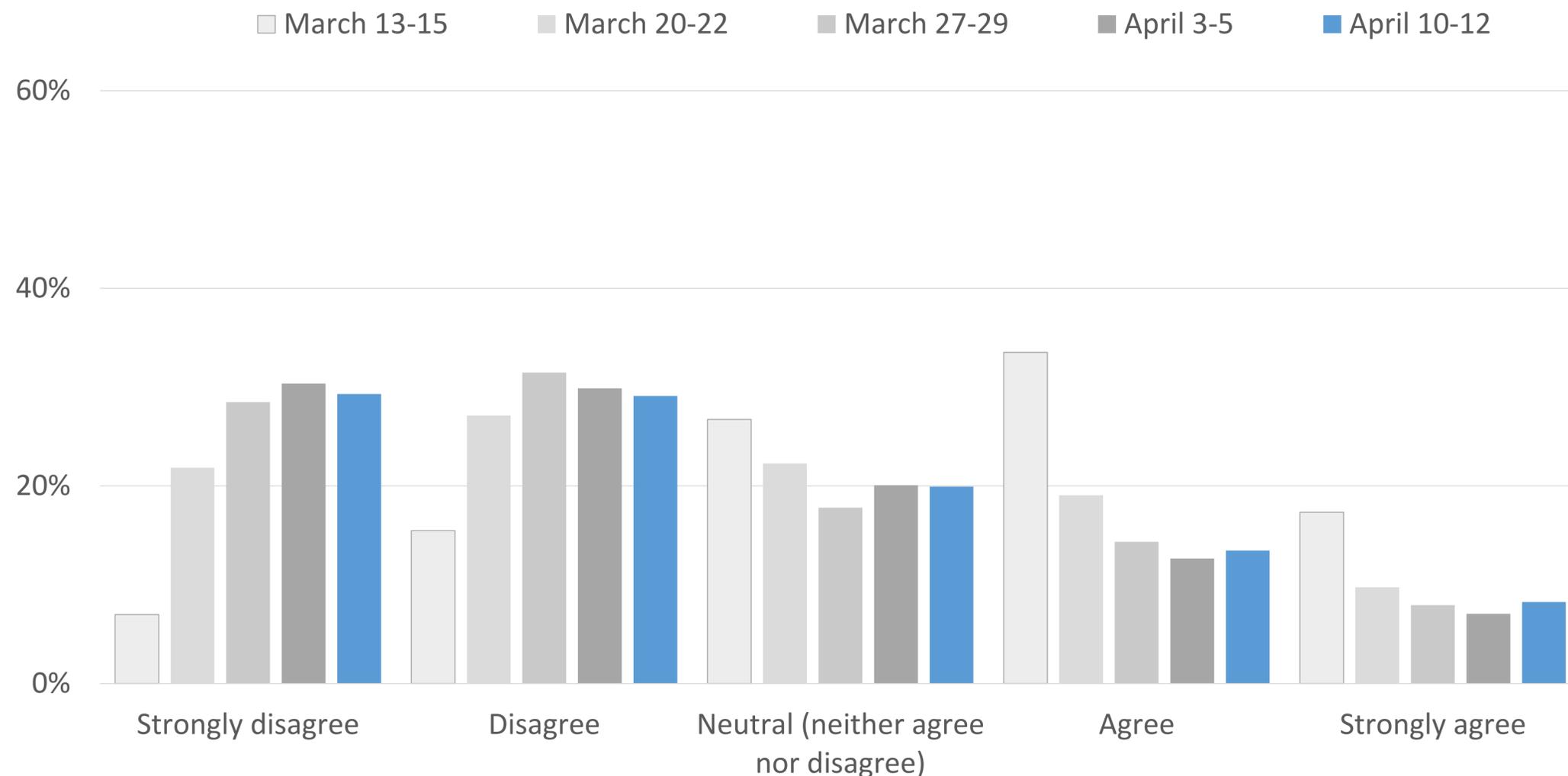
Comfort Enjoying Home Community

American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves. This week, just over 1-in-5 (21.7%) 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

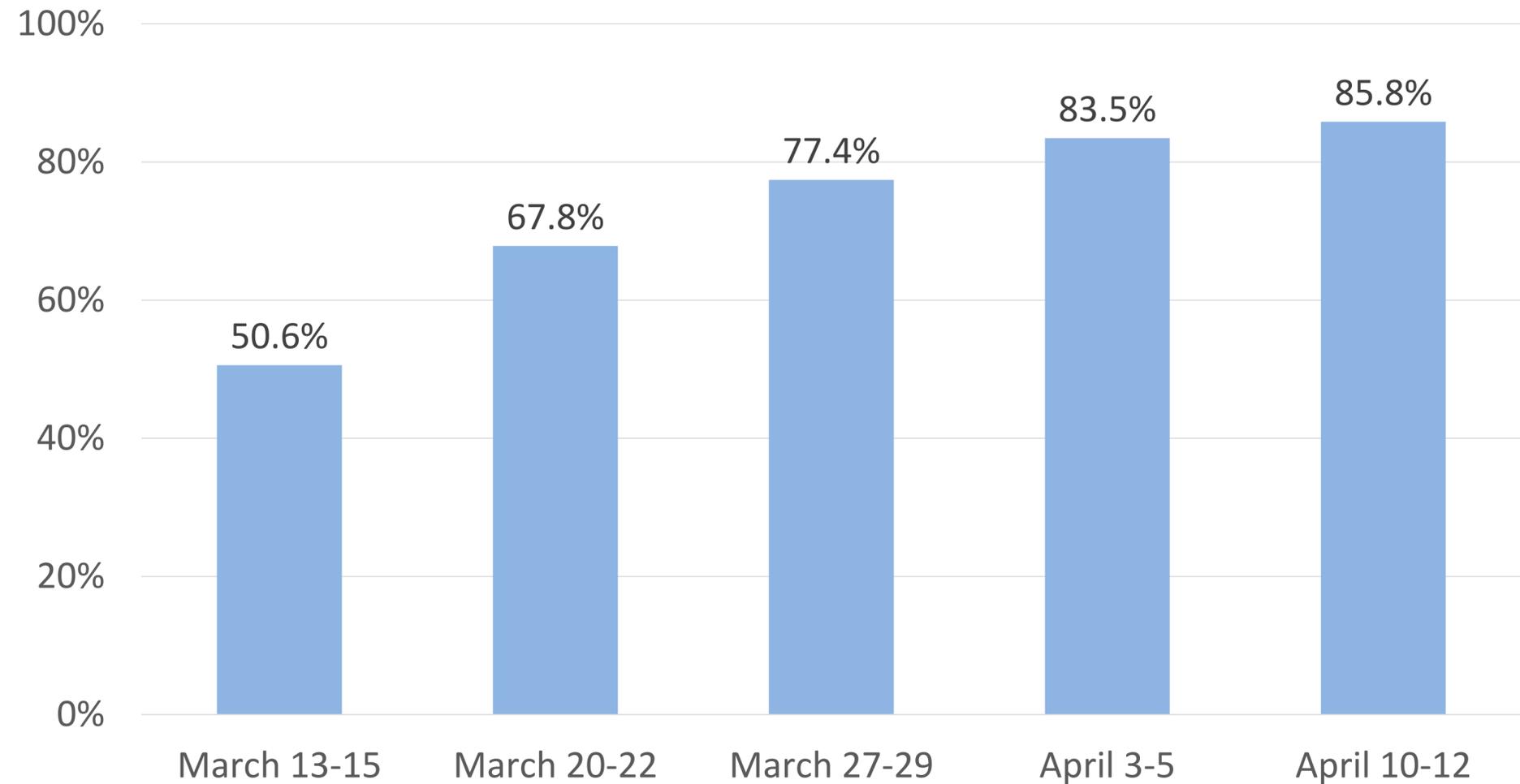


Lives in a Place with Reported Cases of Coronavirus

Nearly 9-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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



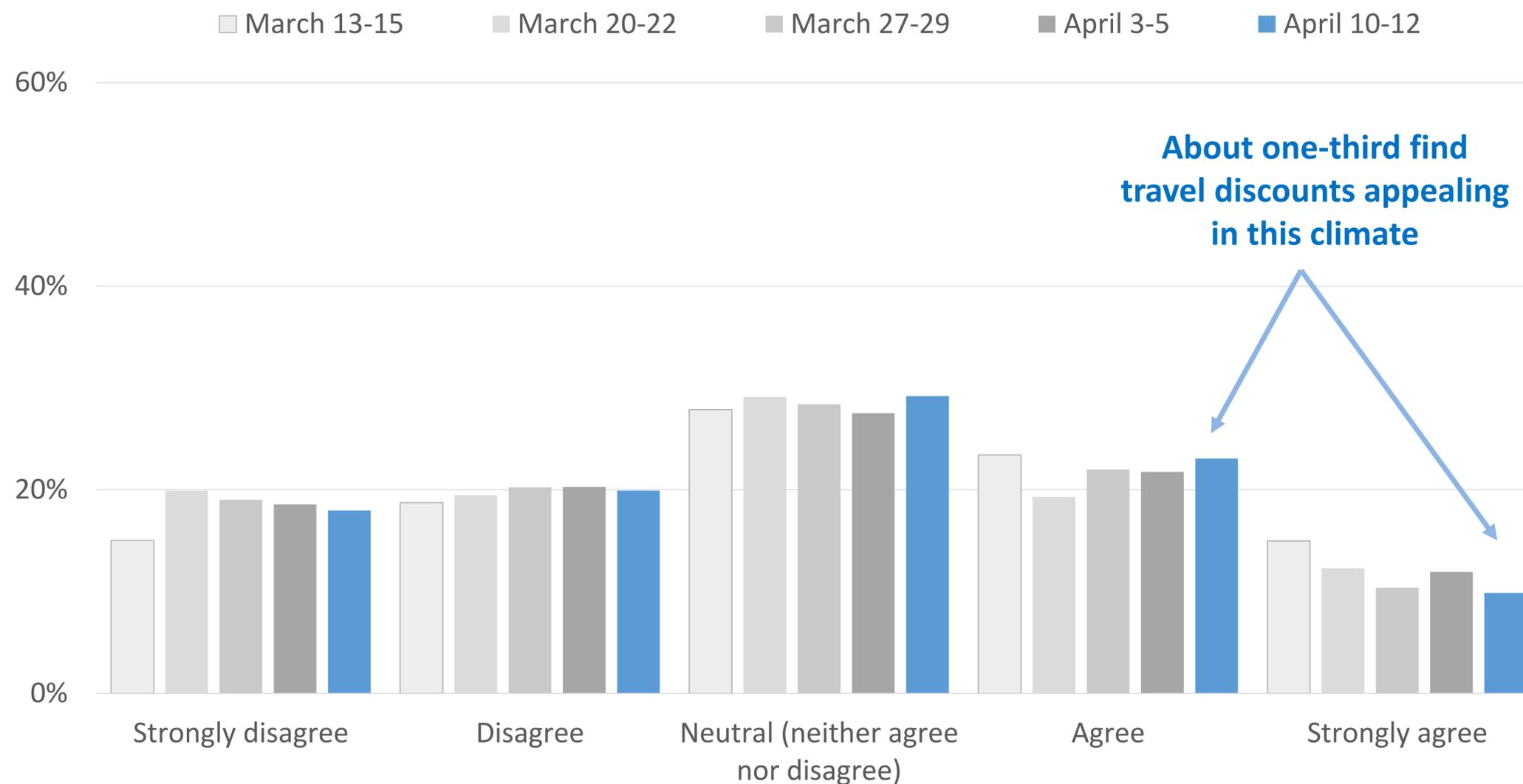
Discounts and Price Cuts

Price cuts resonate with approximately 1-in-3 American travelers. When asked if price cutting made traveling in the next three months more interesting, 32.9 percent now agree, virtually unchanged from last week (33.7%)

How much do you agree with the following statement?

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



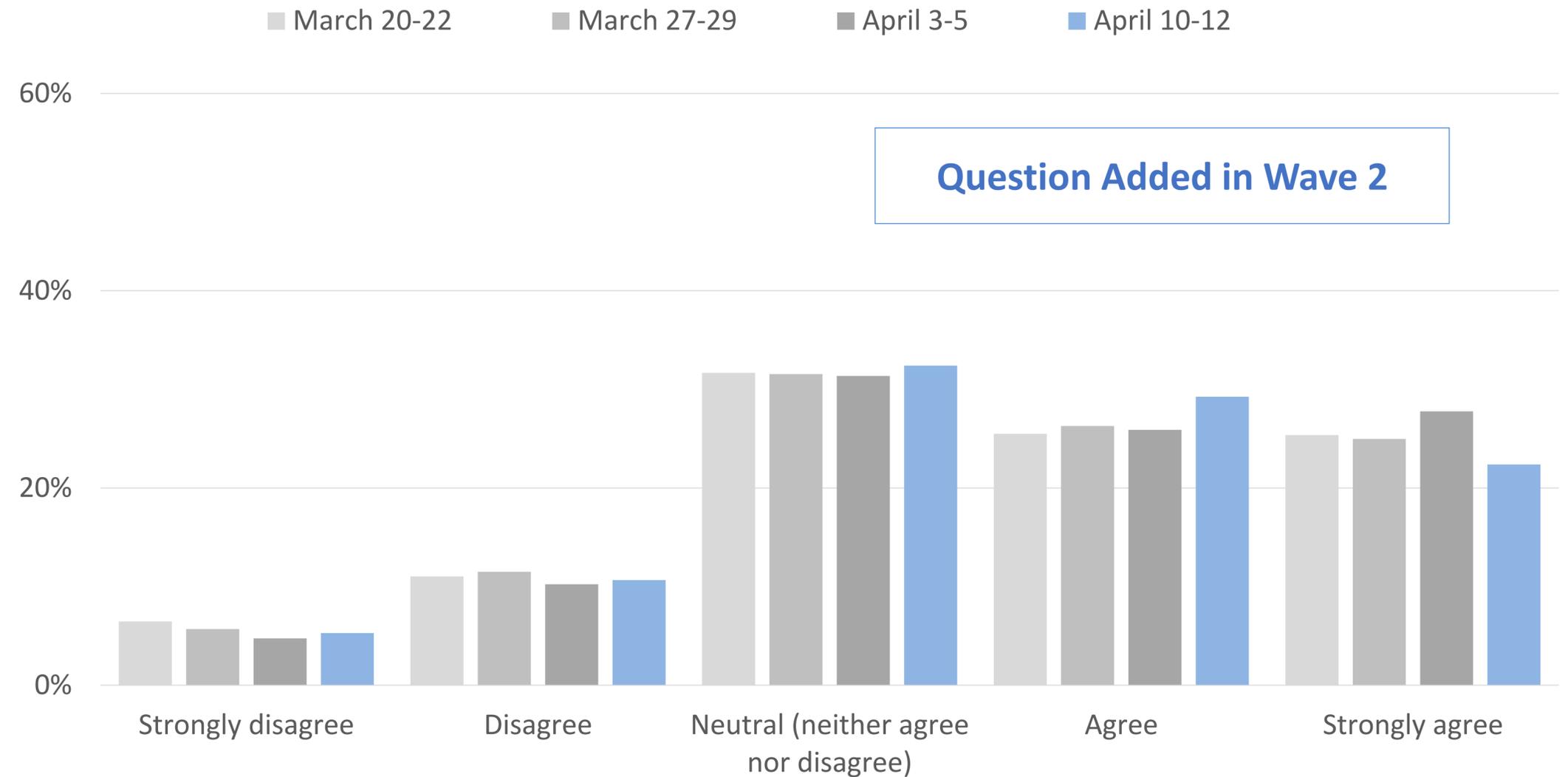
Travel Shaming

Half of Americans (51.6%) feel that persons traveling now should be ashamed of this behavior. Only 16.0 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, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)



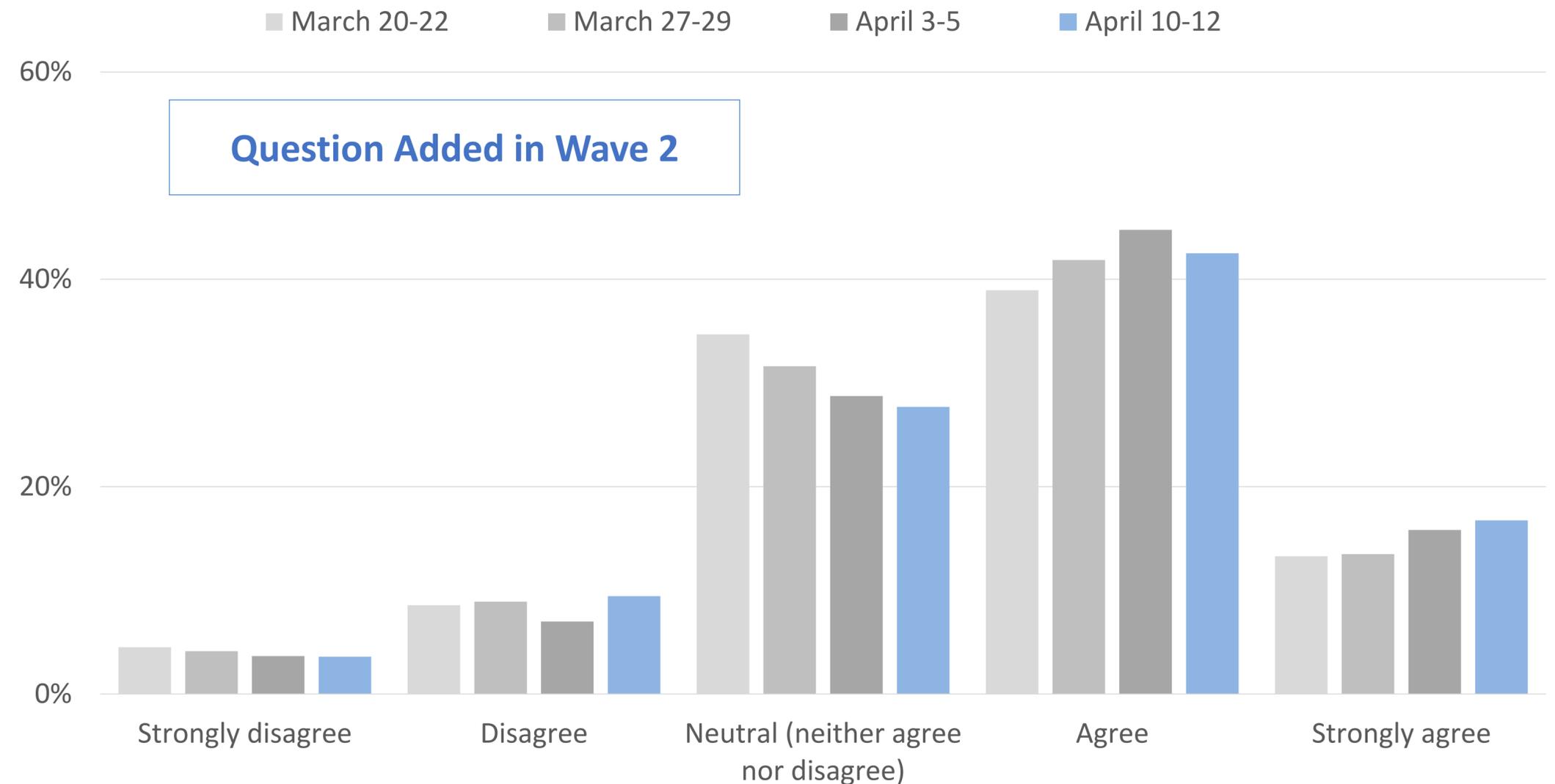
Supporting Local Businesses

6-in-10 American travelers (59.3%) 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.

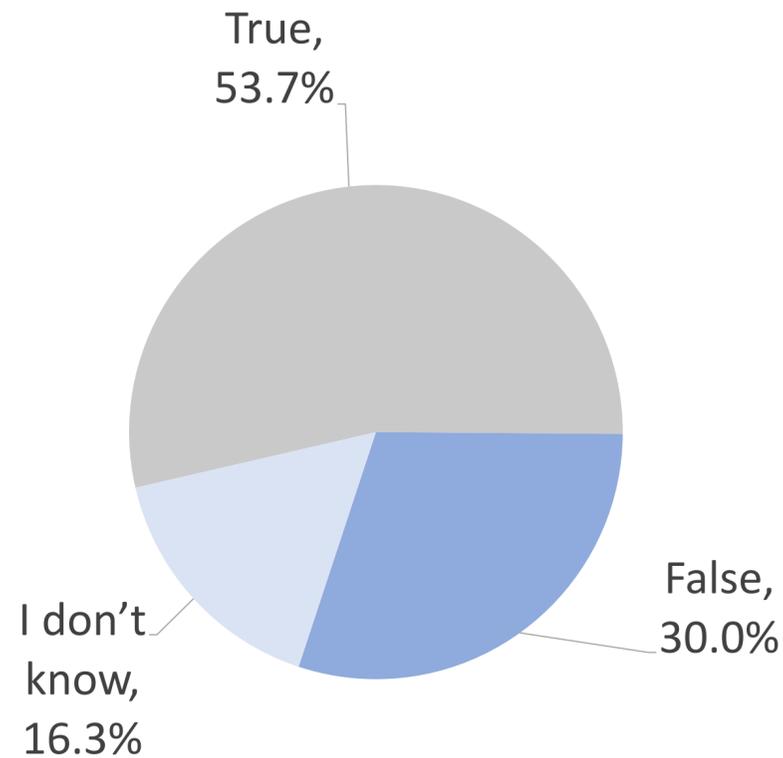
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)



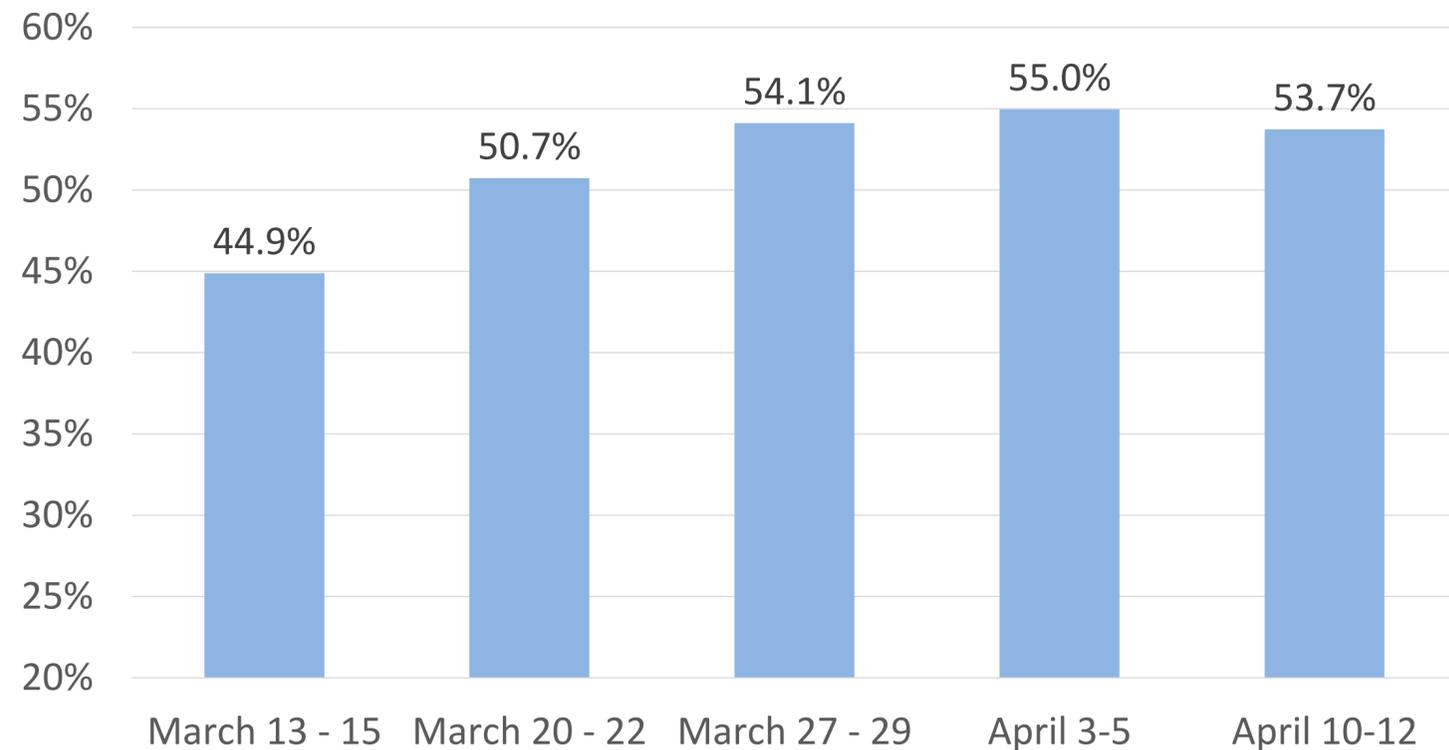
Business Travel Restrictions

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

Wave 5 (April 10-12)



Approximately half of employed American travelers (53.7%) say their employer has put travel restrictions into effect, down from 55.0 percent last week.

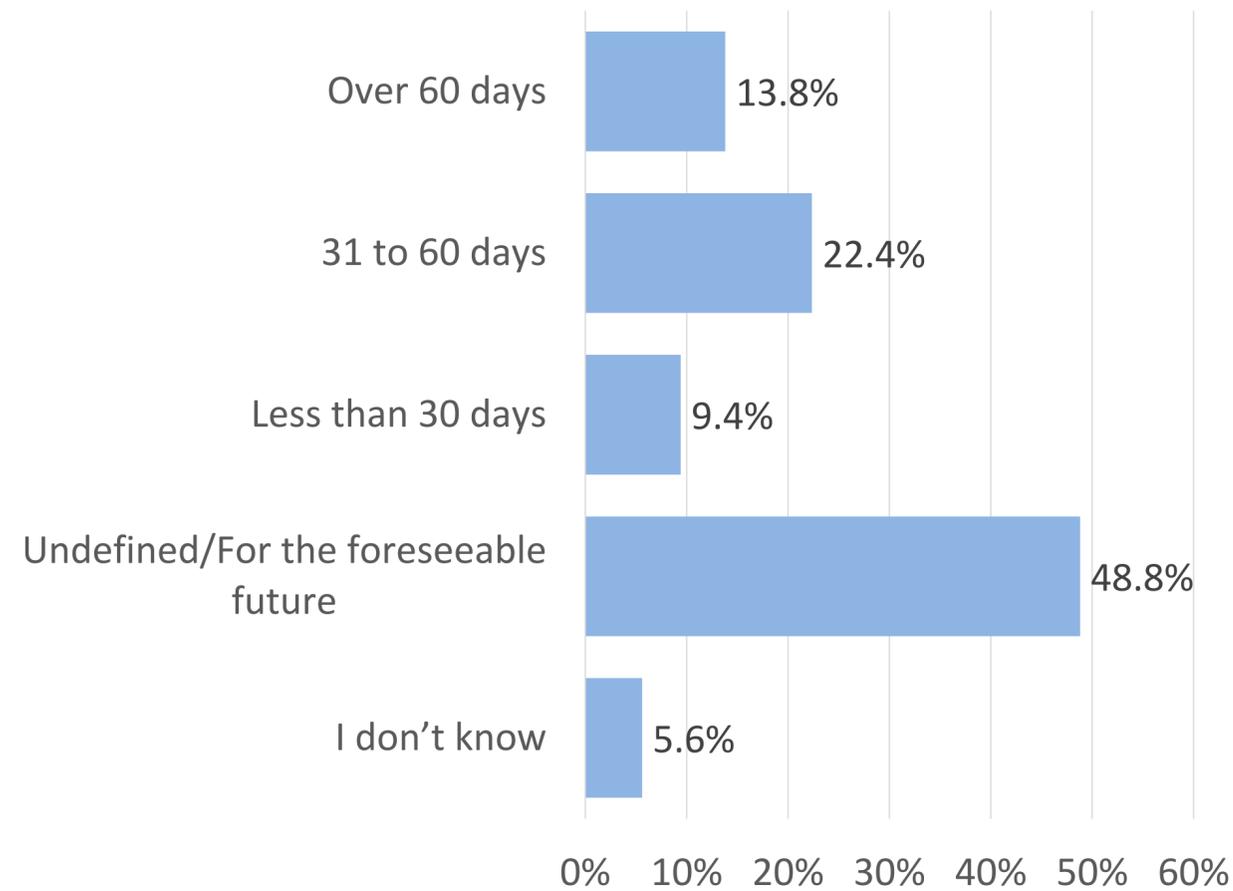


(Base: Employed respondents, 909, 916, 753, 1,041 and 1,130 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

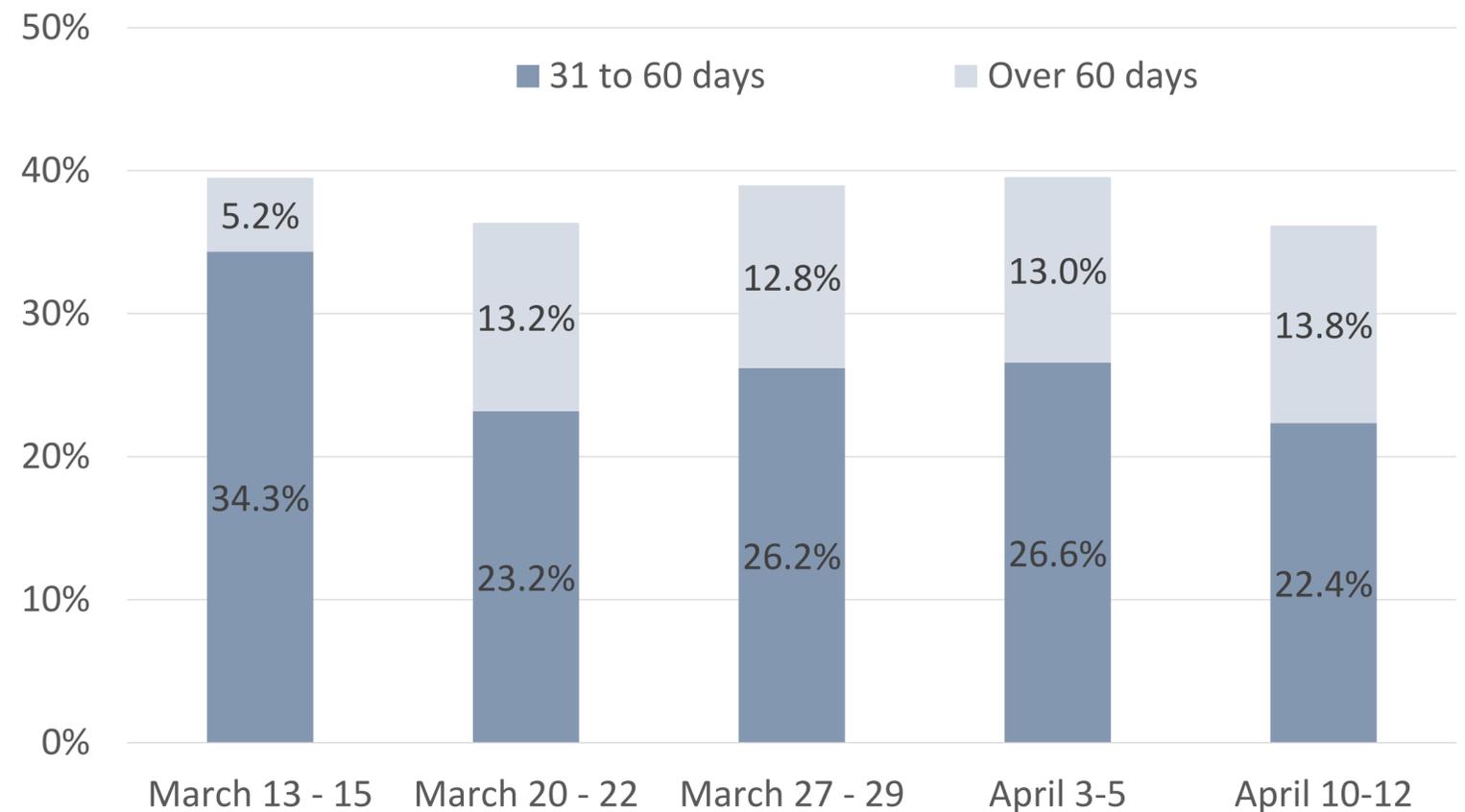
Business Travel Restrictions

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

Wave 5 (April 10-12)



Nearly 4-in-10 employed American travelers with employer-mandated travel restrictions (36.2%) say they will remain in place for at least one month.

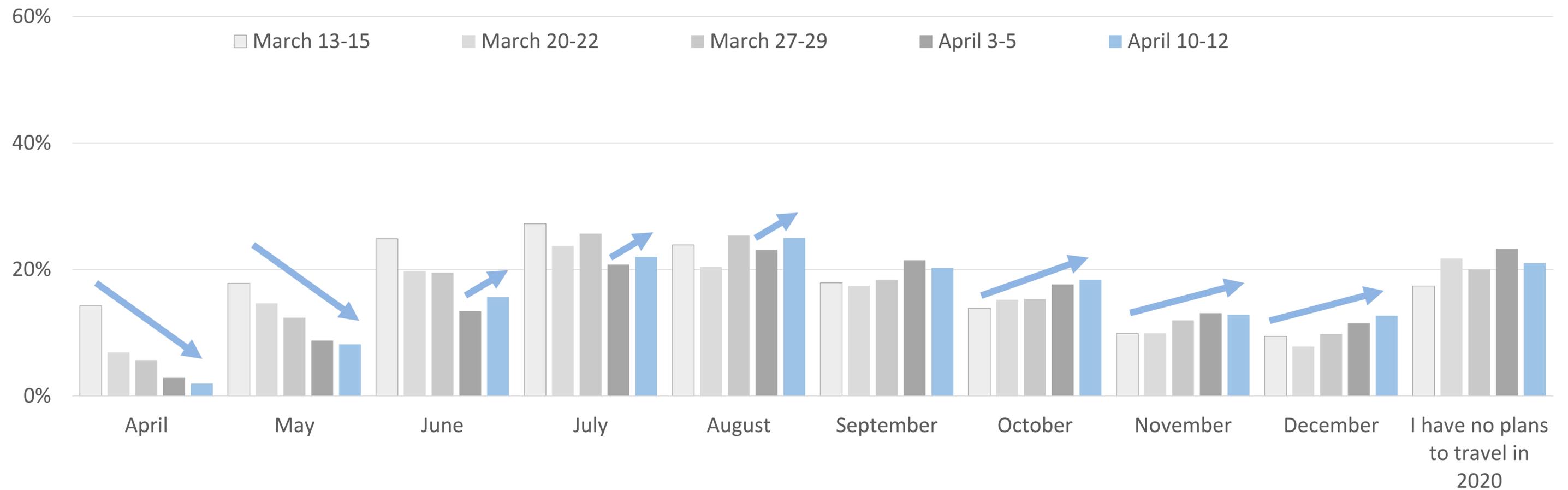


(Base: Employed respondents with travel restrictions, 488, 371, 488, 581 and 616 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Upcoming Travel Plans

While the scheduling of leisure trips in the next two months has plummeted, there does appear to be some increases on the horizon for the late 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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

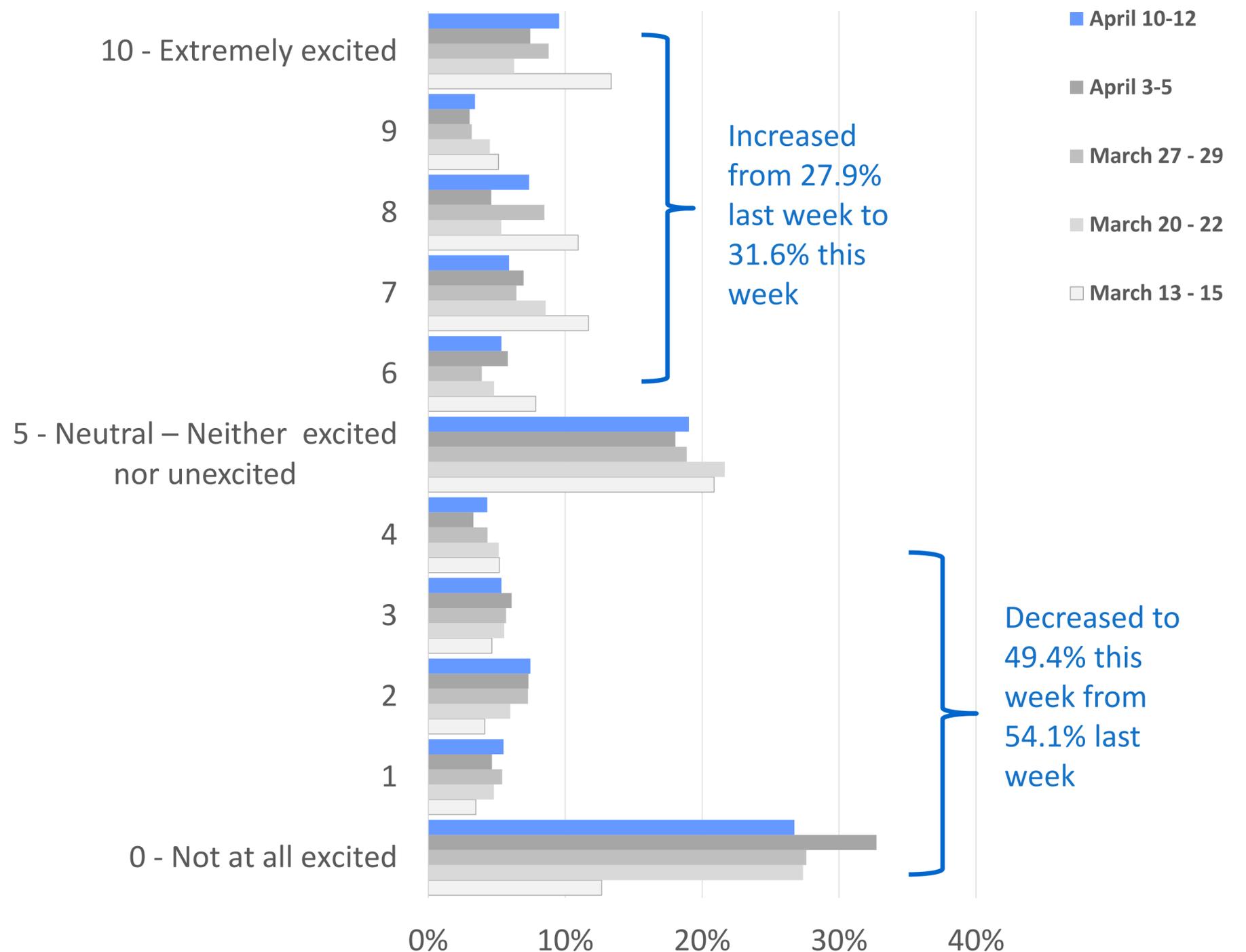
Excitement to Travel Now

Interest in even short trips rebounded slightly this week. About a third of American travelers (31.6%) said they would be excited to take a weekend getaway with a close friend or relative to a place they want to visit next month—up from 27.9 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, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

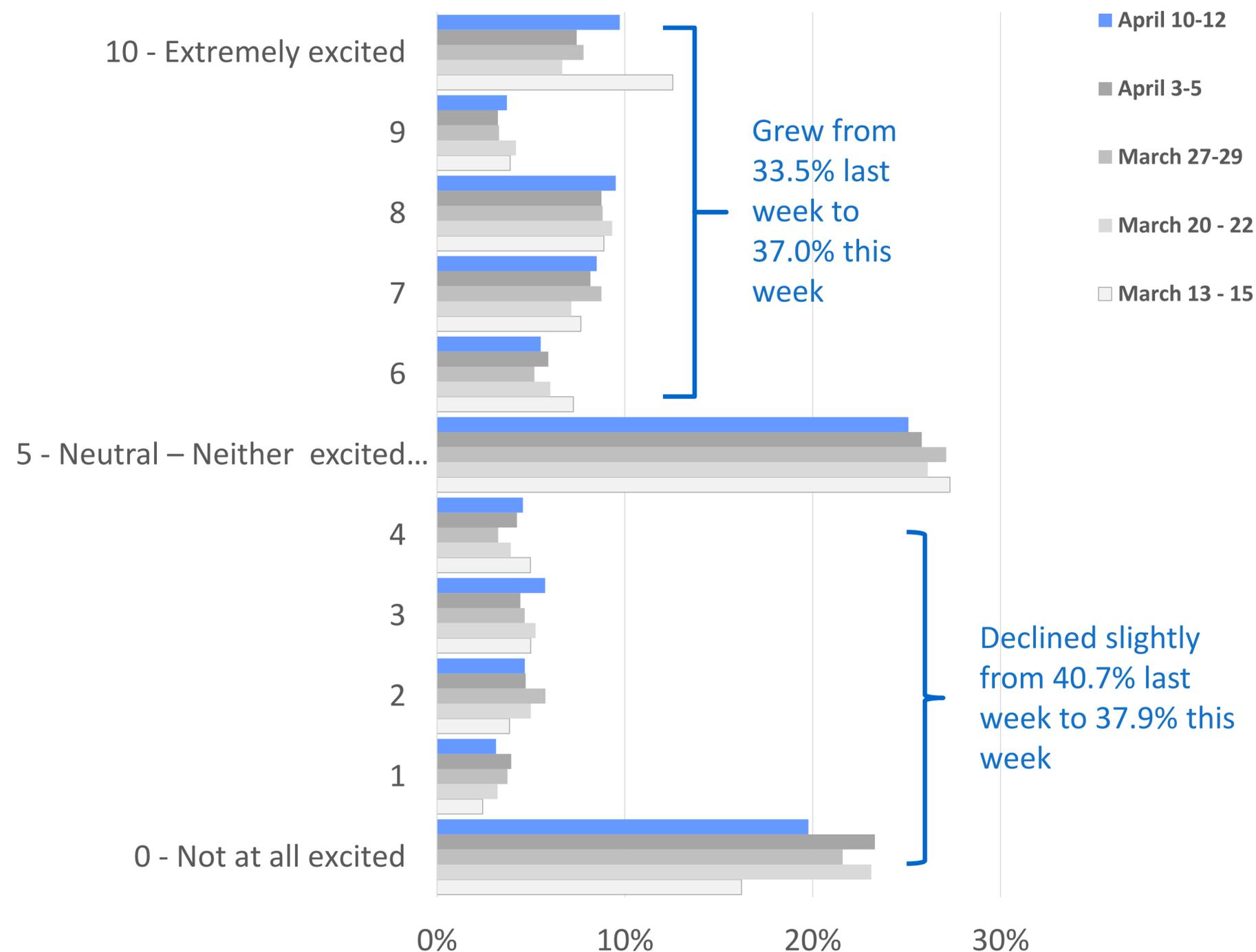


Openness to Travel Information

Travelers' interest in learning about new travel experiences and destinations grew slightly this week. This week, 4-in-10 (37.0%) expressed high levels of excitement about the topic, up from 33.5 percent last week.

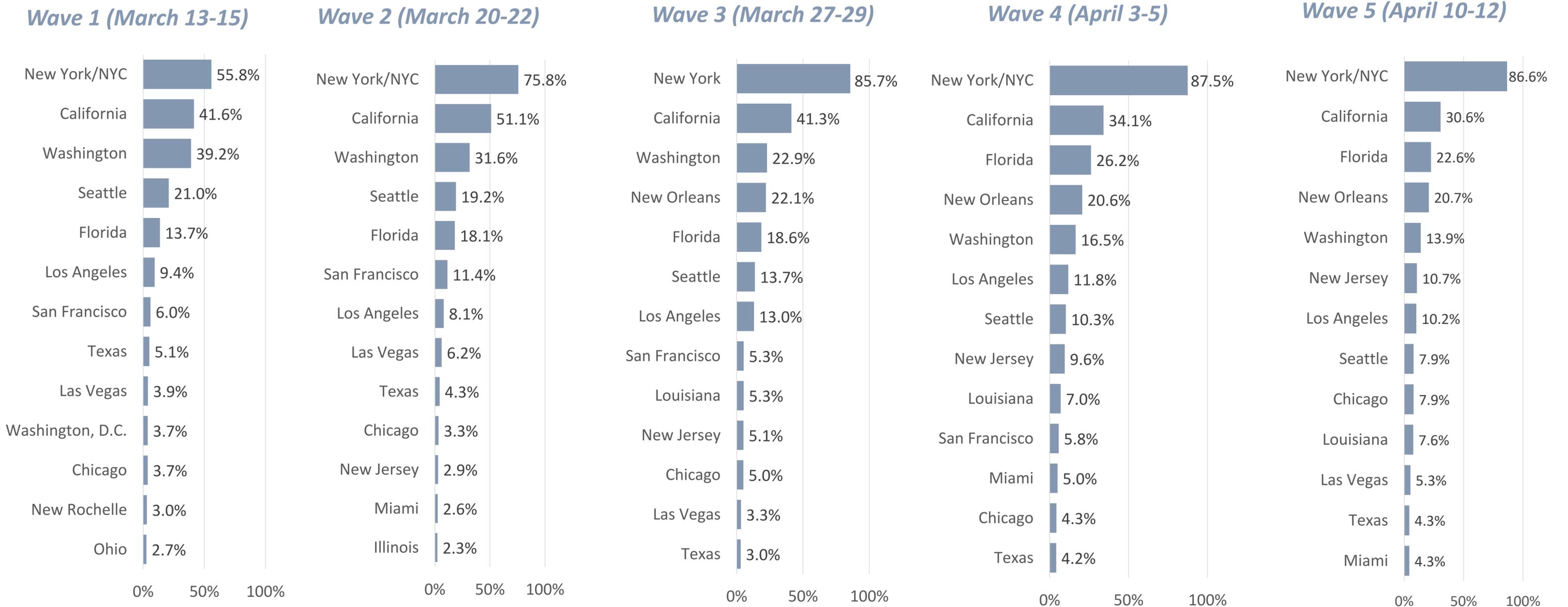
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)



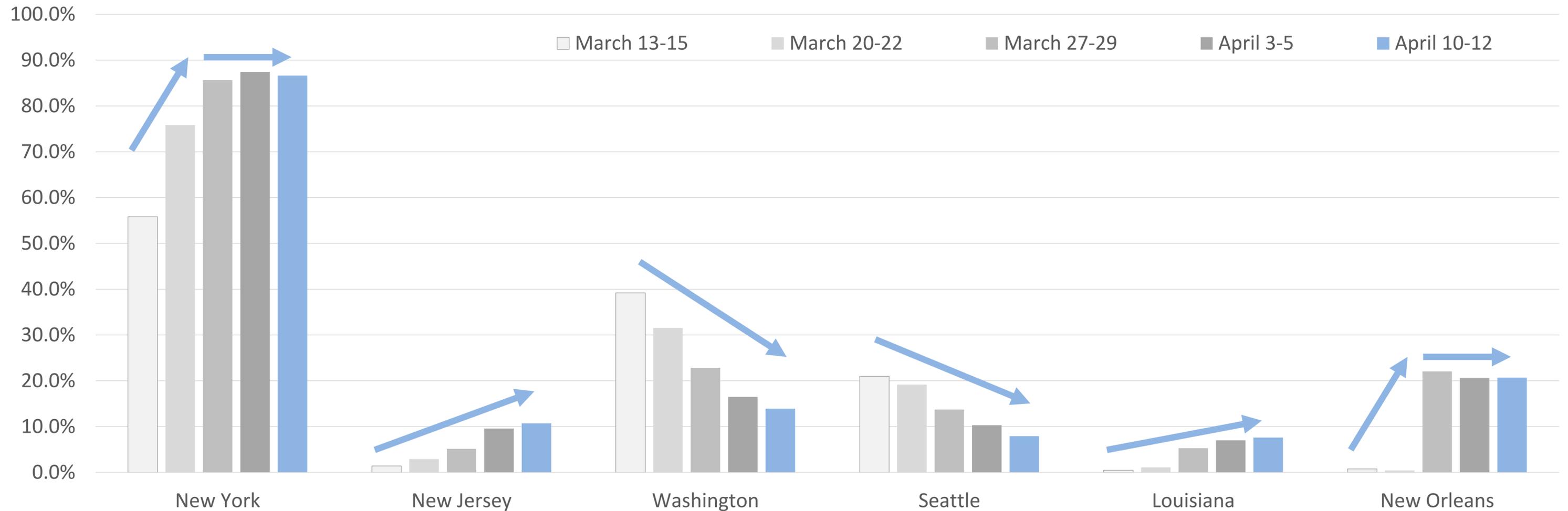
Most Talked About Coronavirus Hotspots

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



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, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

Impact of Coronavirus on Destination Interest

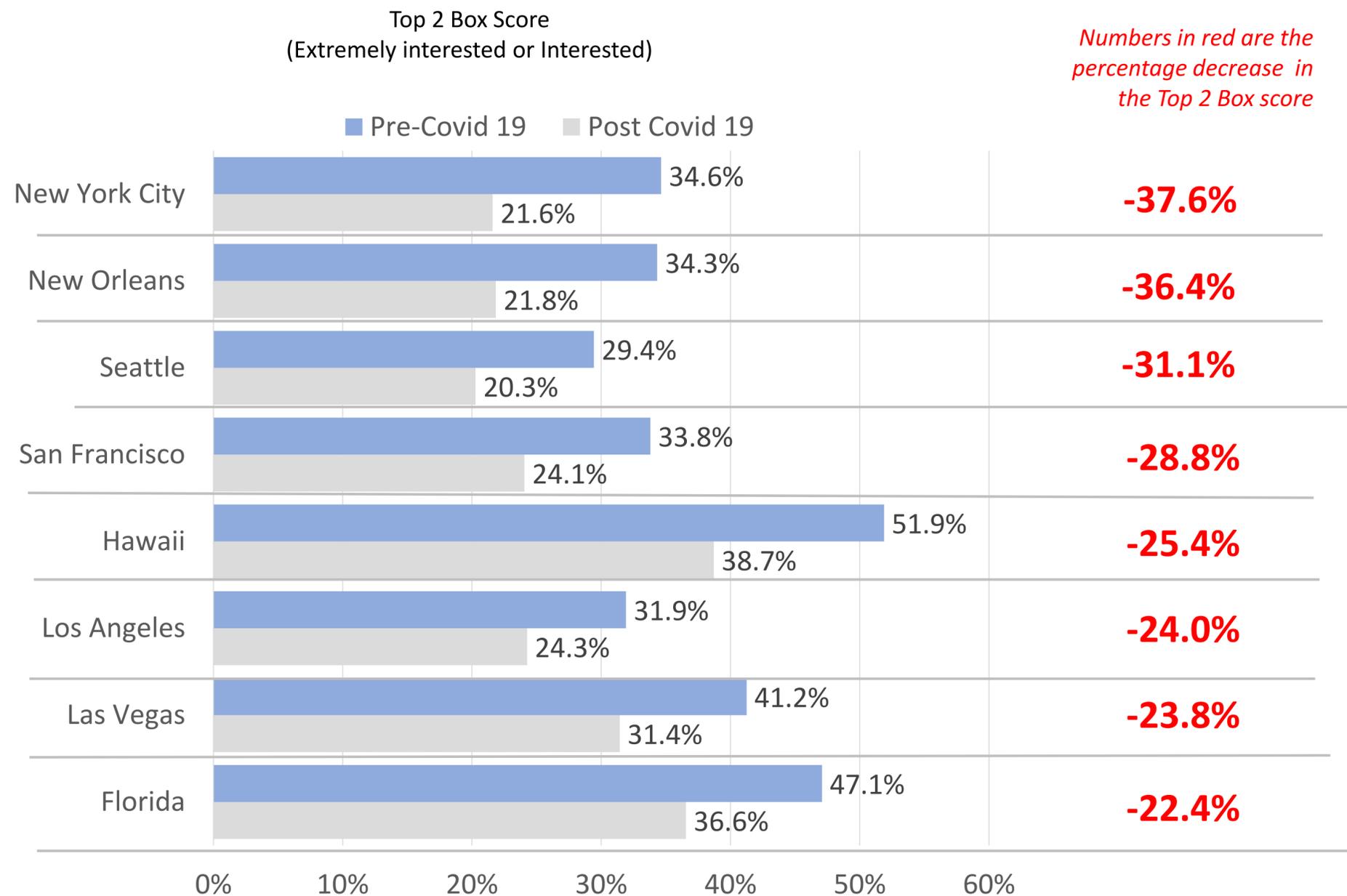
Long-term damage to a destination's brand caused by negative coronavirus publicity will be difficult to measure. At the moment, however, it appears those destinations struggling the most with the virus may have a steep hill to climb in the immediate aftermath of the crisis.

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.



Impact of Coronavirus on Destination Interest

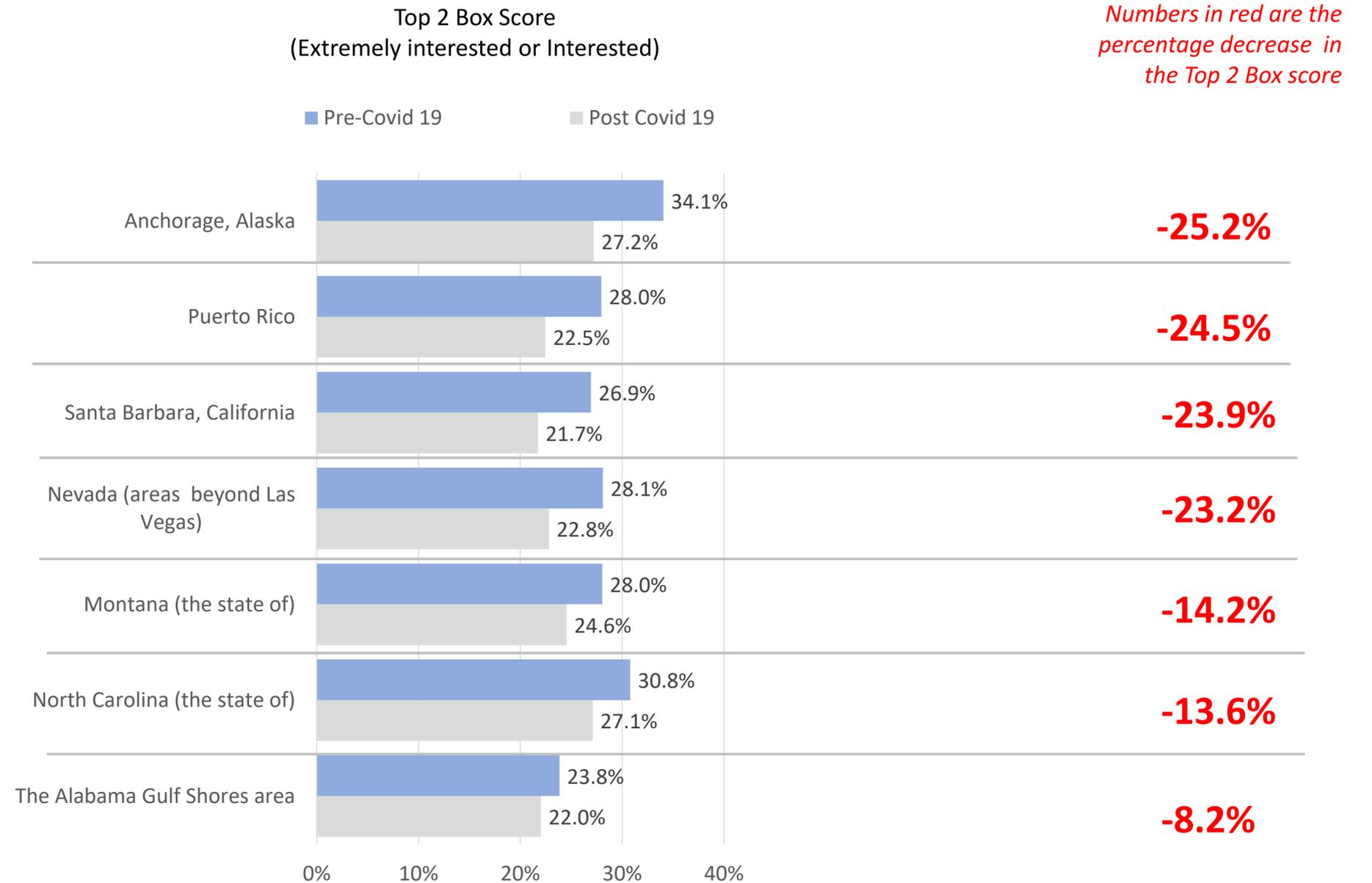
Several destinations with lesser levels of media attention were also tested, and the percent loss in interest in visiting in the immediate post-crisis period was markedly less.

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.



Changes in Travel after the Coronavirus Crisis

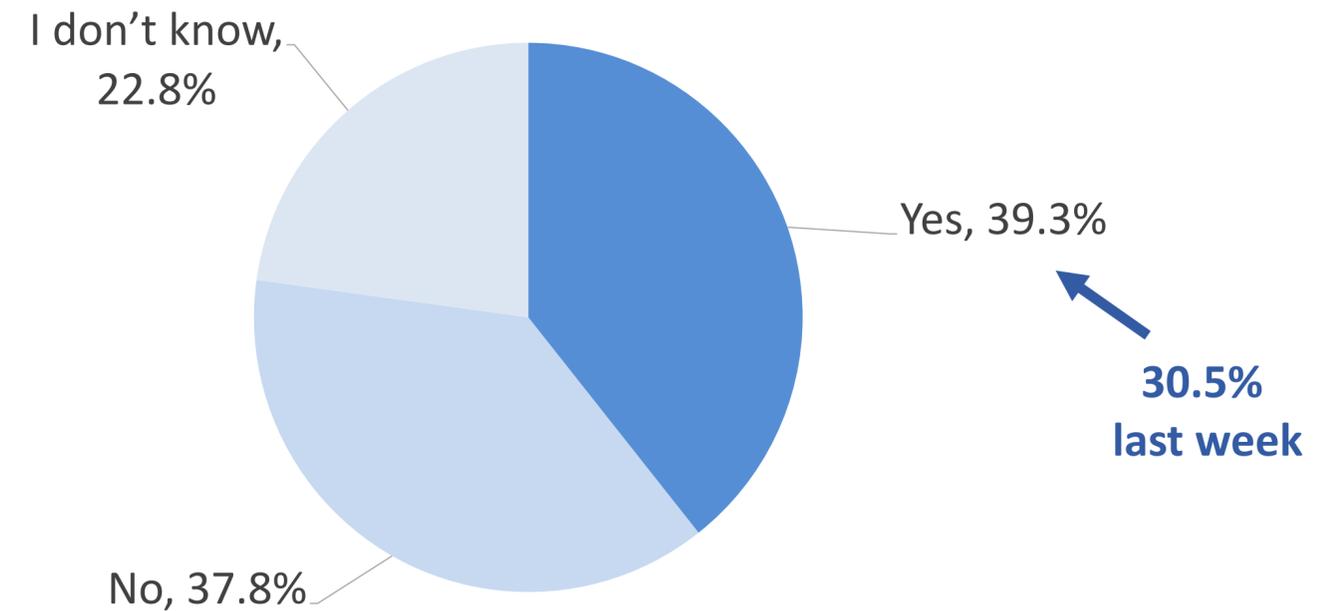
Two-in-five American travelers say they expect to change the types of travel destinations they choose to visit after the coronavirus situation blows over.

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, 1,263 completed surveys. Data collected April 10-12, 2020)

New Question Added in Wave 3



Changes in Travel after the Coronavirus Crisis: Aided

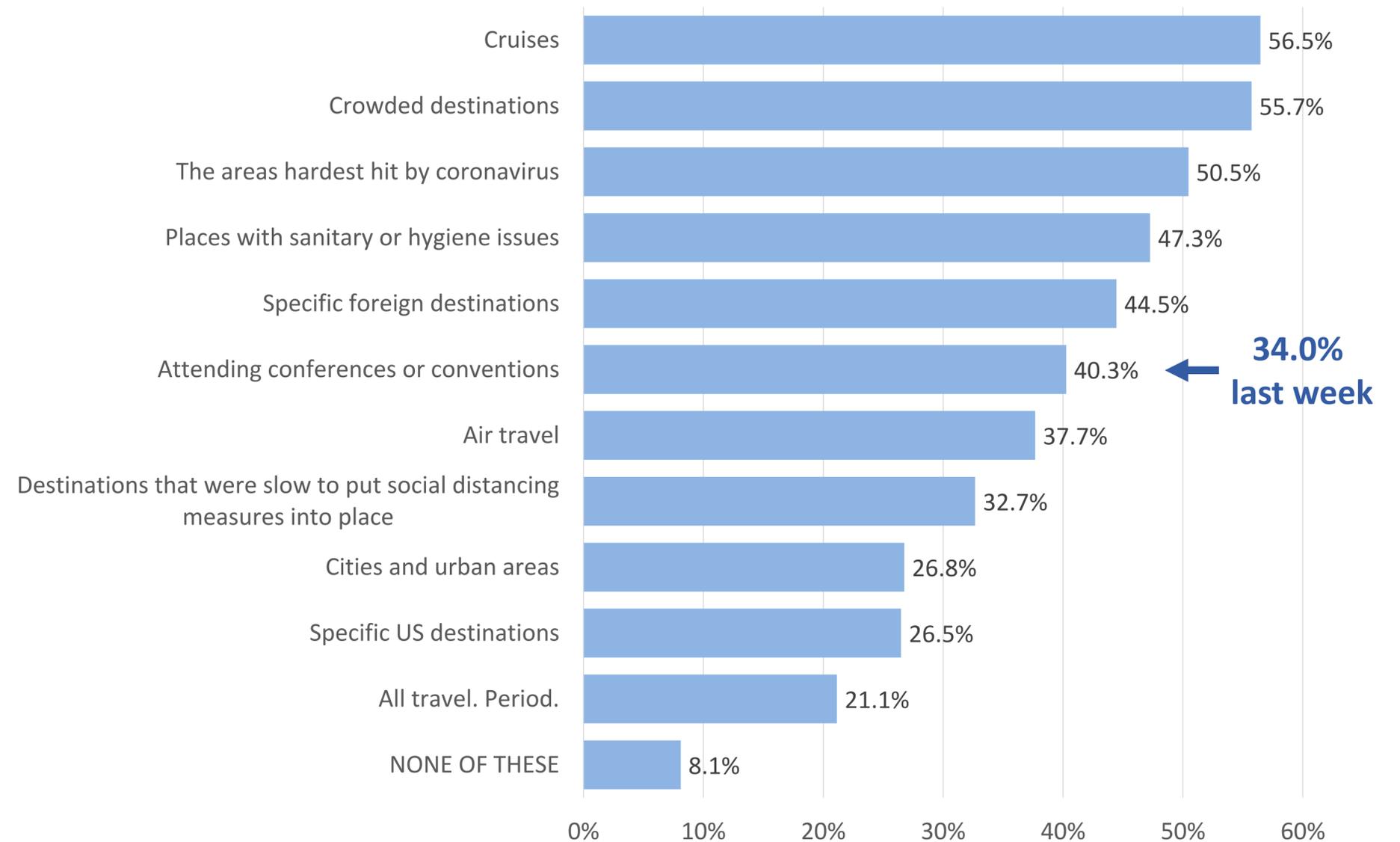
When asked which specific travel behaviors they will likely avoid after the crisis is over, half or more said they would avoid cruises (56.5%), crowded destinations (55.7%) and/or areas hardest hit by the coronavirus (50.5%).

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, 1,263 completed surveys. Data collected April 10-12, 2020)

Wave 5 Data

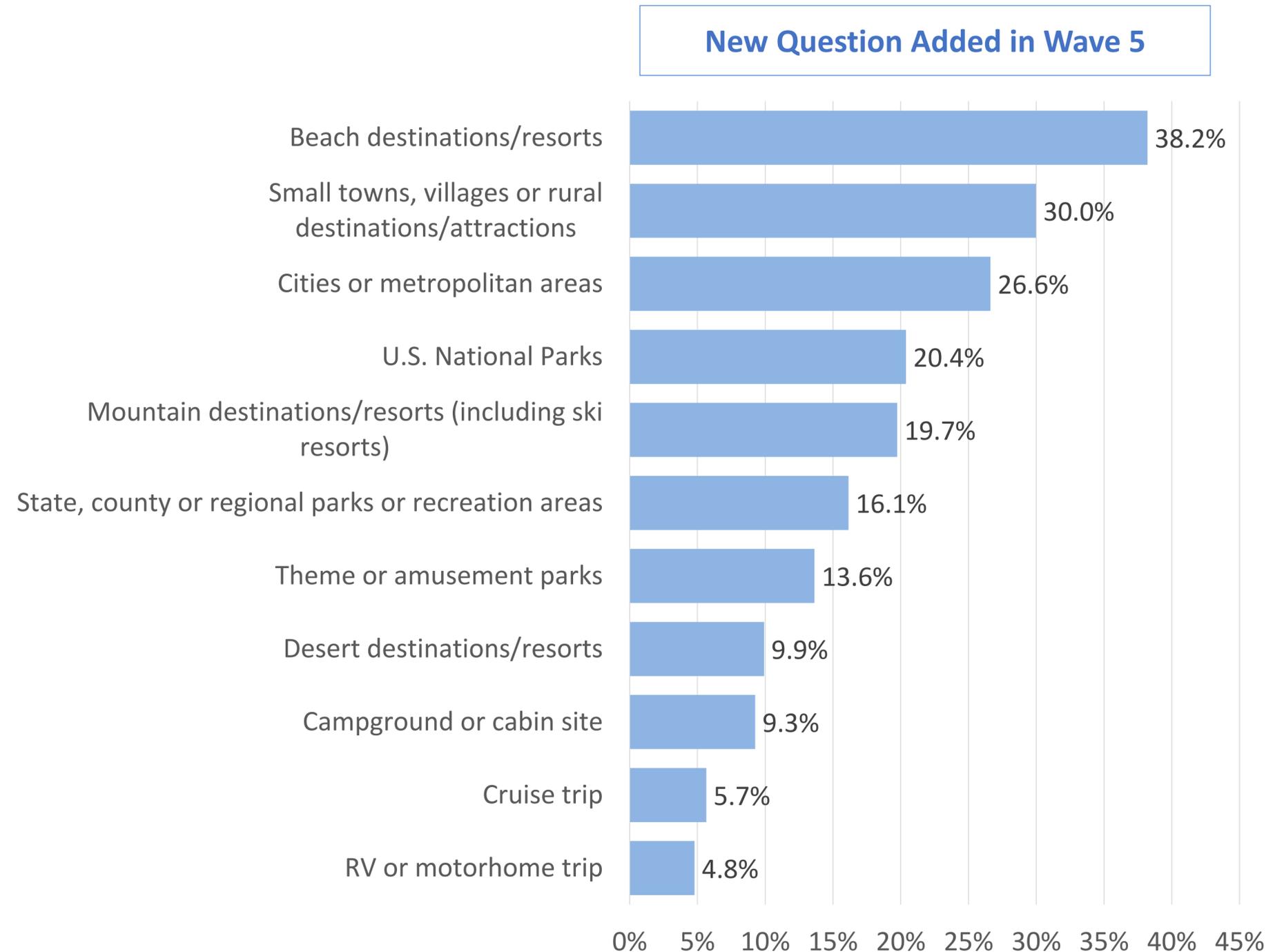


First Trip After the Pandemic

American preferences for their first trip after the pandemic seem to favor beach destinations and resorts, as well as smaller destinations over big cities.

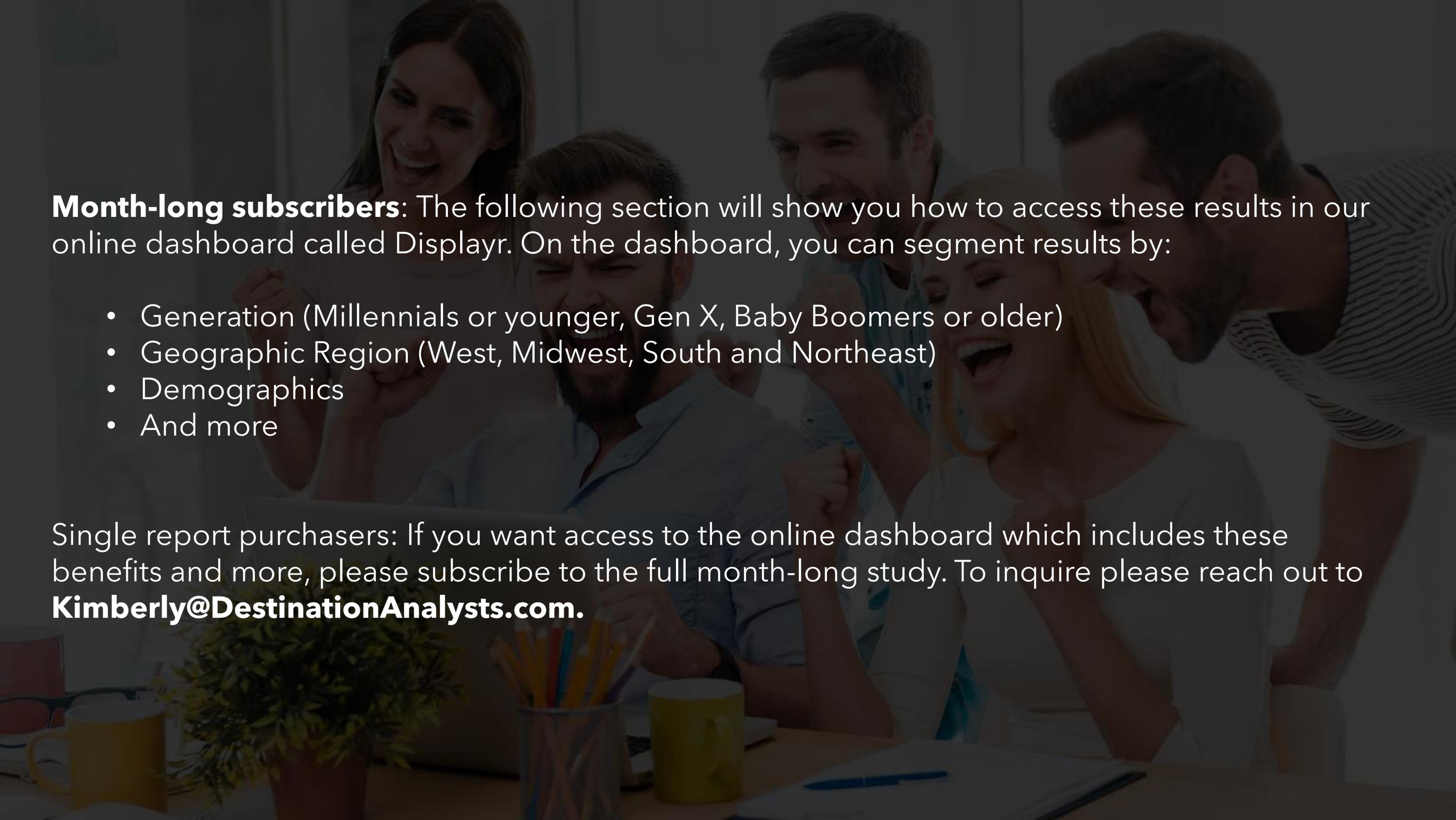
Question: Imagine it is sometime later when you first begin feeling it is safe to travel again for leisure. Which best describes the places you will visit on **THE FIRST TRIP YOU WILL TAKE?**

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)





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%

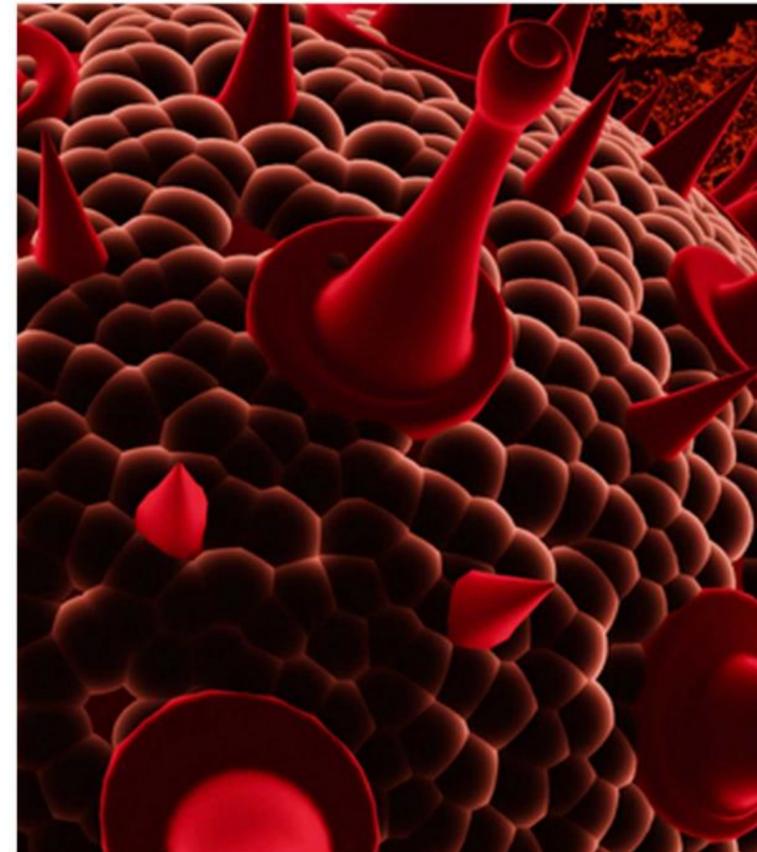
CTMX	0.45	▲	+0.45%
FTR	-0.23	▼	-2.34%
CSCO	-1.01	▼	-1.89%
CHK	0.02	▲	+0.21%
AAPL	+2.58	▲	+3.05%
PRTG	-0.14	▼	-1.42%
AMZN	-0.73	▼	-0.90%
TSLA	+1.08	▲	+5.12%
AVGO	-0.87	▼	-3.88%
SIRI	-0.65	▼	-1.37%

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.

Coronavirus Travel Sentiment Index Report

Search...

Millennial or younger Filters Export ?

Concerned Personally

Concern Level	Percentage
0 - Not at all concerned	6.6%
1	2.0%
2	5.1%
3	2.4%
4	4.7%
5 - Neutral - Neither Concerned nor	16.9%
6	9.4%
7	15.9%

20.7%

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus?
Base: Millennial or younger 629 responses.

Wave

- March 13-15

Segmentation

- Total
- Millennial or younger
- Gen X
- Boomers or Older
- West
- Midwest
- Northeast
- South

Travel Activity Past 2 Years

- Took 1+ Leisure Trips
- Visited Friends & Relatives
- Took 1+ Business Trips
- Attended a Convention, Conference or Group Meeting
- Used a Commercial Airline
- Used a Commercial Cruise Line
- Used Commercial Lodging
- Traveled Outside the US

Lodging Type Used in Last 2 Years

- Full-service or 3-4 star hotel
- Budget hotel or motel
- Luxury or 5-star hotel

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

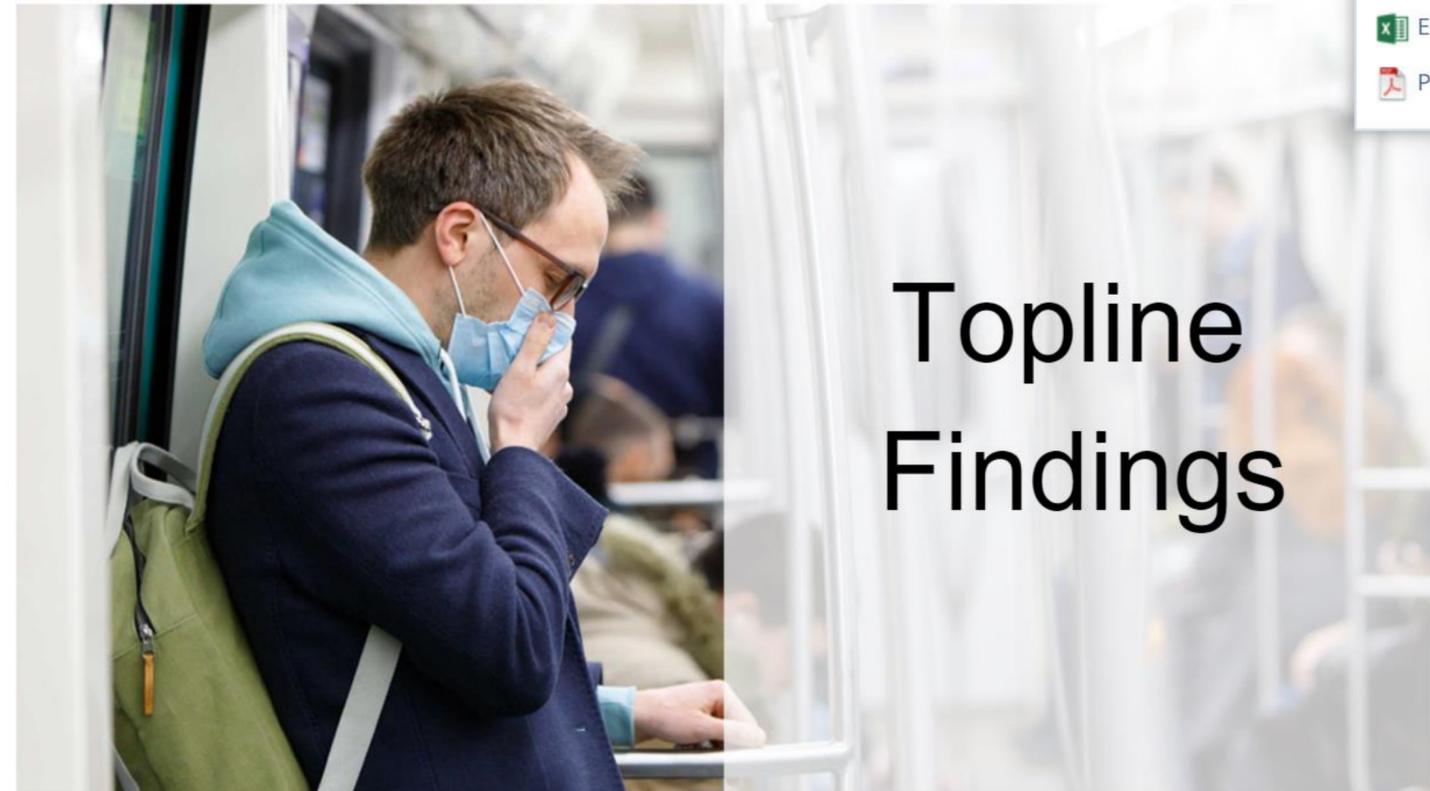
EXPORTING THE DATA:

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

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

Coronavirus Travel Sentiment Index Report

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



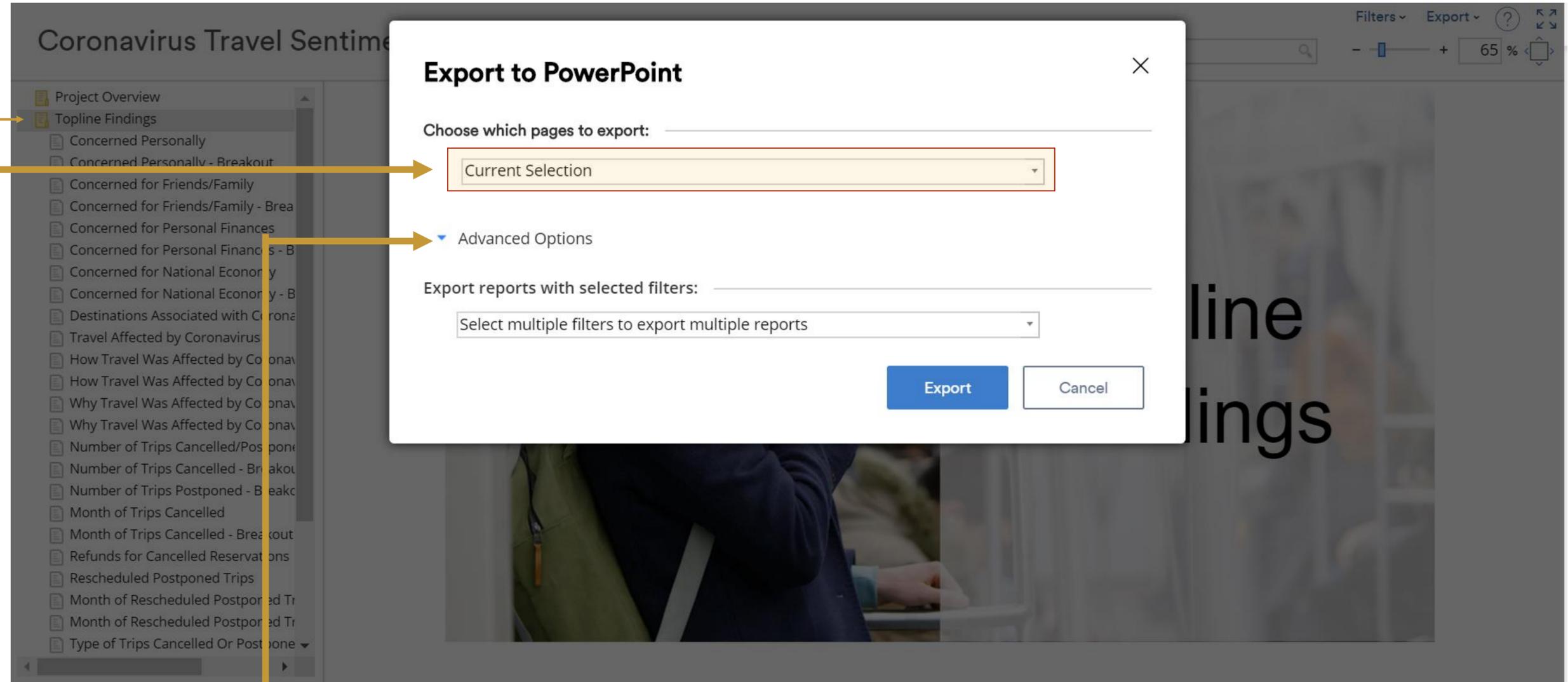
Topline Findings

EXPORTING THE DATA:

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

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

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



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

NEED MORE HELP?

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

Chingun Ganzorig

Research Manager

Chingun@DestinationAnalysts.com

(415) 722-2503

