

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 8

RESEARCH FINDINGS

May 4, 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 eighth 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 eighth wave of this survey was collected from May 1-3, 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, 1,204 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



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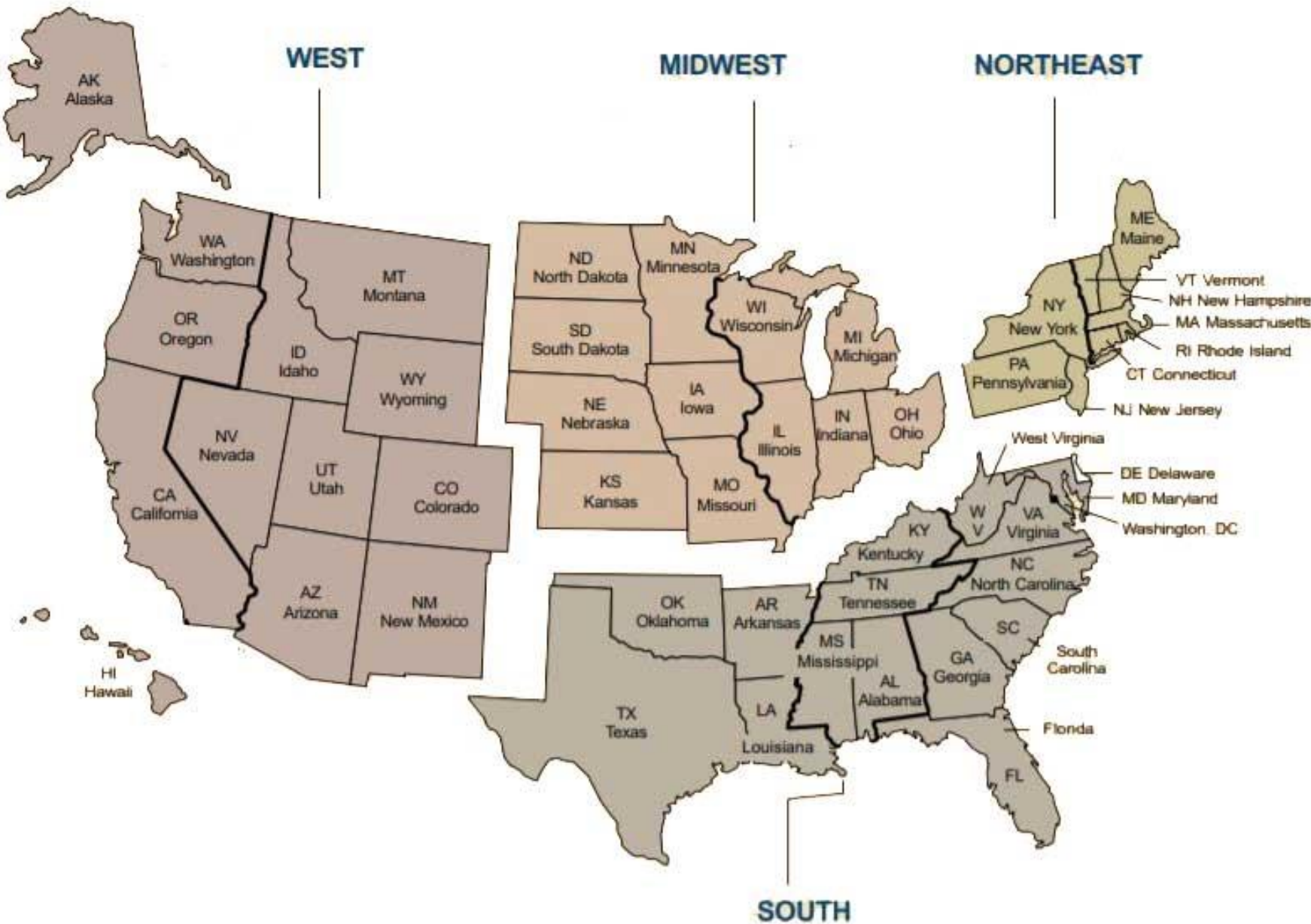
Project Overview

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.

	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
Wave #11	May 22-24	May 25
Wave #12	May 29-31	June 1

Map of U.S. Showing Survey Regions



Key Findings

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

- **Worries about personally contracting the coronavirus continue to be significant.** Now, 72.6 percent of survey respondents say they have some level of concern about contracting the virus, up slightly from 70.4 percent last week. For the fourth week in a row, concerns about the health of friends and family dropped again slightly, with 77.3 percent expressing concern for the safety of their loved ones, down slightly from 78.8 percent last week.
- **Concern that the pandemic will impact Americans' personal finances decreased this week, moving from 70.0 percent to 66.5 percent.** Worries about the nation's overall economic performance remain extremely high. Nearly 90 percent of travelers expressed some level of concern for the national economy.
- **Cruise travel is seen as the least safe travel activity.** 83.5 percent of American travelers say that traveling on a cruise is either "Somewhat unsafe" or "Very unsafe." The perceived safety of various travel activities improved again this week. In the eighth survey wave, the proportion of travelers rating each activity as either "Somewhat unsafe" or "Very unsafe" decreased again.



Key Findings



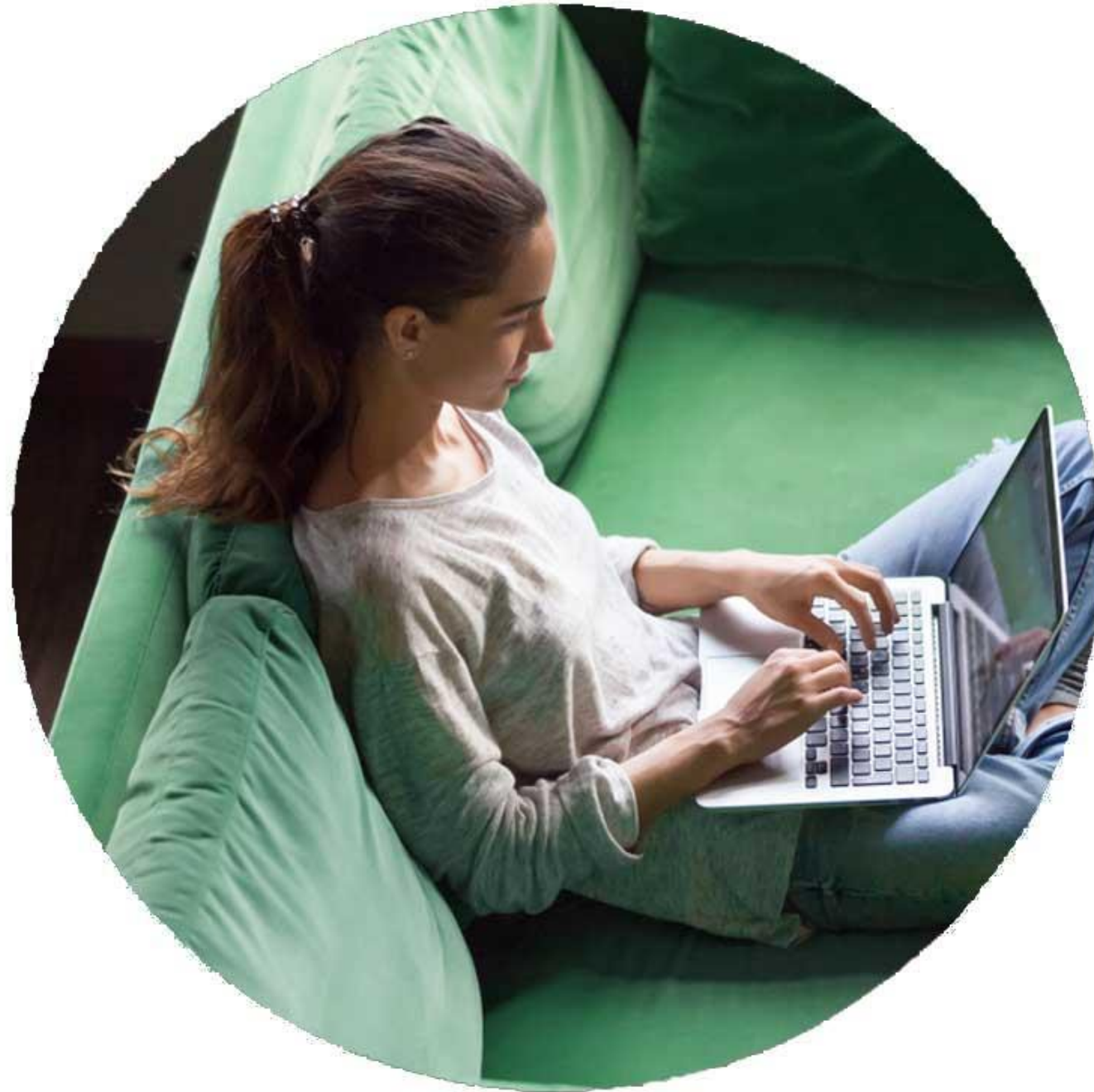
- **Overall traveler expectations for the pandemic's severity improved this week.** 35.1 percent expect the coronavirus situation to get worse in the next month, down from 37.2 percent last week.
- **Excitement to get back out on the road increased this week, as 70.6 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.** Despite their stated enthusiasm to get back out and travel, most American travelers appear to be reluctant to get back on airplanes. Only about one-quarter (26.3%) say they would now be comfortable traveling on a commercial airline.
- **There will likely be an uneven return to air travel by Americans.** Half of American travelers feel it is too risky to travel on an airplane right now with, 42.8 percent saying their next trip by air will not be until 2021 or later. Airlines will need to consider an array of safety measures before attracting large crowds of the past back. The most popular idea amongst travelers in the use of high-tech cleaning protocols between flights. High-tech cleaning protocols were also the most important safety measure cited when travelers were asked what would make the feel the most comfortable that the airline was looking out for their health.

Key Findings

- **Hotels face a similar challenge as airlines, and travelers most want hand sanitizers, face masks and disinfectant wipes to use, well-explained cleaning procedures and required health checks for employees.** Similarly, hand sanitizers, face masks and disinfectant wipes to use, and well-explained cleaning procedures will be the most important ways a hotel can make travelers feel they are looking out for their health. Hotel guests are likely to find high-tech cleaning practices a valuable service provided by hotels. Over 2-in-3 state that this would make them feel more comfortable staying in a hotel.
- **Mobile check-in appears to be a very popular concept with travelers.** When asked which of a list of services they intended to use on their next hotel stay, 64.3 percent said they would check-in using their mobile device.
- **Fitness centers and spas in hotels may see greatly diminished use in the wake of the coronavirus.** When asked which hotel services they would be less likely to use due to the pandemic, fitness centers (54.5%) and spas (51.1%) were the most frequently cited services. Breakfast buffets were also cited by 49.7 percent of travelers.



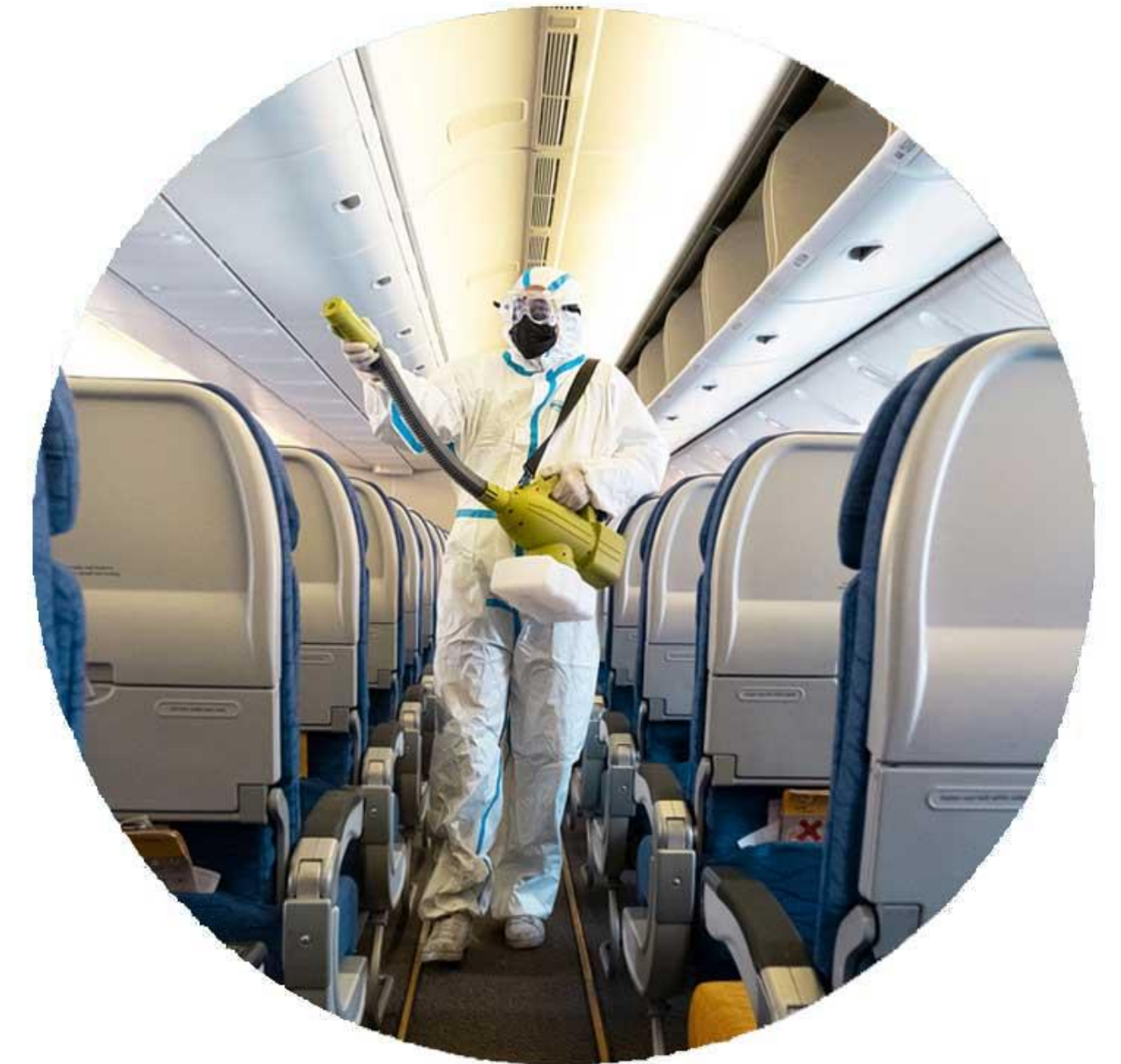
Key Findings



- **Cancellations.** This week, the proportion of American travelers reporting they have cancelled trips due to the coronavirus grew to 69.4 percent from 63.7 percent last week. Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with nearly two-thirds of respondents citing it as a reason (63.2%). The average American traveler who has cancelled a trip says they have done so for 2.0 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.7 trips due to the crisis. Cancellations of May trips has increased significantly this week. The proportion of travelers being fully refunded for cancelled trips stayed constant this week. 66.0 percent report receiving full refunds, similar to 65.6 percent last week. All types of travel are being cancelled, with vacations being the most common type. Again, in this wave there were no major changes in the types of destinations being cancelled. Cities and metropolitan areas continue to be the most cancelled destination type.
- **Postponements.** Approximately 7-in-10 American travelers who have postponed a trip due to the pandemic have not yet rescheduled it. In the most recent survey wave, postponements appear to be increasing for the months of May and June. Vacations are still the most postponed trip type, with visiting friends and relatives coming in second. Urban areas are still the most postponed destination type.

Key Findings

- **Like most consumers, travelers expect travel brands to satisfy their needs, and if unhappy, are likely to buy from the brand's competition.** Nearly 2-in-3 travelers say that if a travel company doesn't take health considerations seriously, they are likely to withhold future purchases. Similarly, 68.8 percent of travelers say they would be likely to complain to friends and relatives if they have such a negative experience with a travel business.
- **In the eighth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus remained unchanged at 75.7 percent.**
- **One-in-three (31.0%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure fell slightly this week.**
- **This week, just under two-thirds (65.1%) of American travelers say they are done traveling until the coronavirus situation blows over.** Strong agreement with this statement has declined significantly in the last three weeks (41.3% last week vs. 29.9% this week).



Key Findings



- Agreement that the coronavirus situation will be resolved by the summer travel season continues to decline. In total, 19.3 percent of Americans agree on some level that the coronavirus situation will be resolved before summer, while over half (53.4%) disagree.
- Identical to last week, just under half of American travelers (48.2%) expect to be back traveling this Fall.
- Half of American travelers still agree that staycations may end up replacing vacations this summer (51.0% vs. 49.3% last week).
- Unchanged from last week, 38.0 percent of Americans say car travel may displace some of their air travel this year.
- Just under half (48.8%) still say they'll probably take more regional trips while avoiding long-haul trips (similar to last week at 47.4%).
- Likelihood of attending meetings in the current environment remains low. Under three-quarters of travelers (73.9%) say they will be unlikely to attend these events until the coronavirus situation is over (similar to last week at 72.6%).

Key Findings

- A majority (78.2%) still say they will be unlikely to travel abroad until the coronavirus situation is resolved—unchanged from last week at 77.8 percent.
- American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves. While only 30.6 percent say they are comfortable going out in their community (up slightly from 28.2% last week), strong disagreement with this sentiment continues to decline.
- Price cuts resonate with over a third of American travelers. When asked if price cutting made traveling in the next three months more interesting, 35.6 percent agree, up slightly from last week (34.7%).
- Now, 66.4 percent of American travelers say they have been taking action to try to support local businesses where they live (up from 60.3% last week).
- Fewer than three-in-five American travelers agree that they do not want travelers coming to visit their community in the current environment (60.4%—down from 63.5%). Only 13.0 percent disagree.



Key Findings



- **Opinions continue to be split on whether destinations should currently be marketing respondents' home communities—even for travel after the pandemic is over.** While 30.8 percent said they would be happy to see such an advertisement (down from 33.1% last week), 36.4 percent said they would be unhappy.
- **The proportion of American travelers who say they will not be traveling until a Covid-19 vaccine is developed declined this week.** Now 29.8 percent agree with this sentiment (down from 35.2% last week). However, 37.6 percent currently reject this idea.
- **Americans appear largely uncertain about the reopening.** Overall, 35.3 percent of American travelers say they are comfortable with their home state re-opening its economy right now. However, a larger proportion (43.0%) are not yet comfortable with this.
- **A quarter of American travelers are looking forward to taking a cruise once the coronavirus situation is resolved (24.6%).** Over half though reject this idea (55.8%).

Key Findings

- **As we have seen in past waves, while the scheduling of leisure trips in the next two months has fallen sharply, there appears to be some increases on the horizon for the Fall months.**
- **Interest in even short trips increased slightly this week.** Two-in-five American travelers (39.8%) 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 38.3 percent last week.
- **Travelers' interest in learning about new travel experiences and destinations edged up very slightly this week.** Four-in-ten (42.6%) expressed some level of excitement about the topic, up from 41.6 percent last week.
- **New York continues to be the most talked about destination with coronavirus issues.** Nearly 87 percent of survey respondents identified New York as one of the three most talked about places.





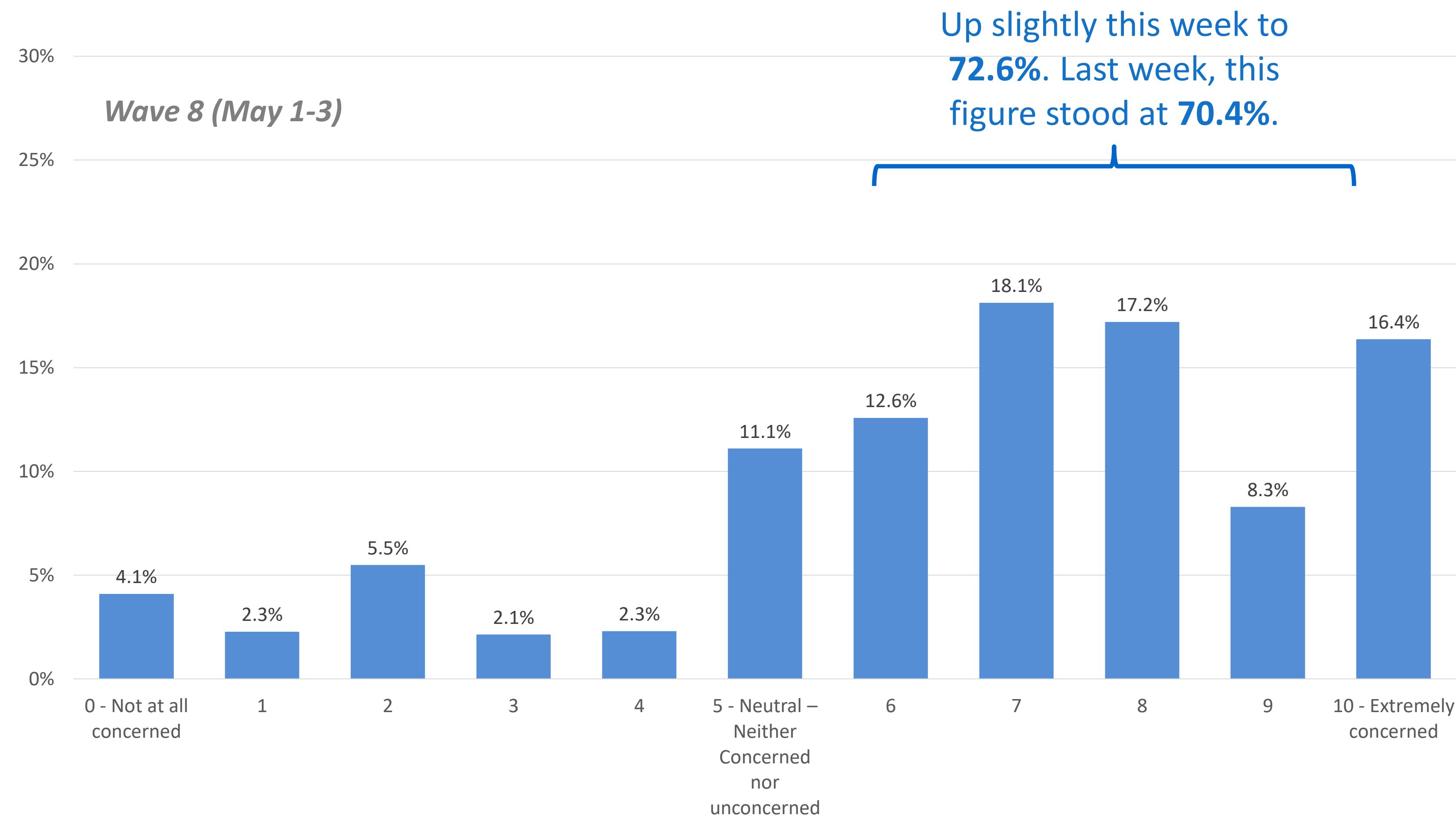
Section I: Current Feelings About Travel

Personal Health Concerns

Worries about personally contracting the coronavirus continue to be significant. Now, 72.6 percent of survey respondents say they have some level of concern about contracting the virus, up slightly from 70.4 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 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

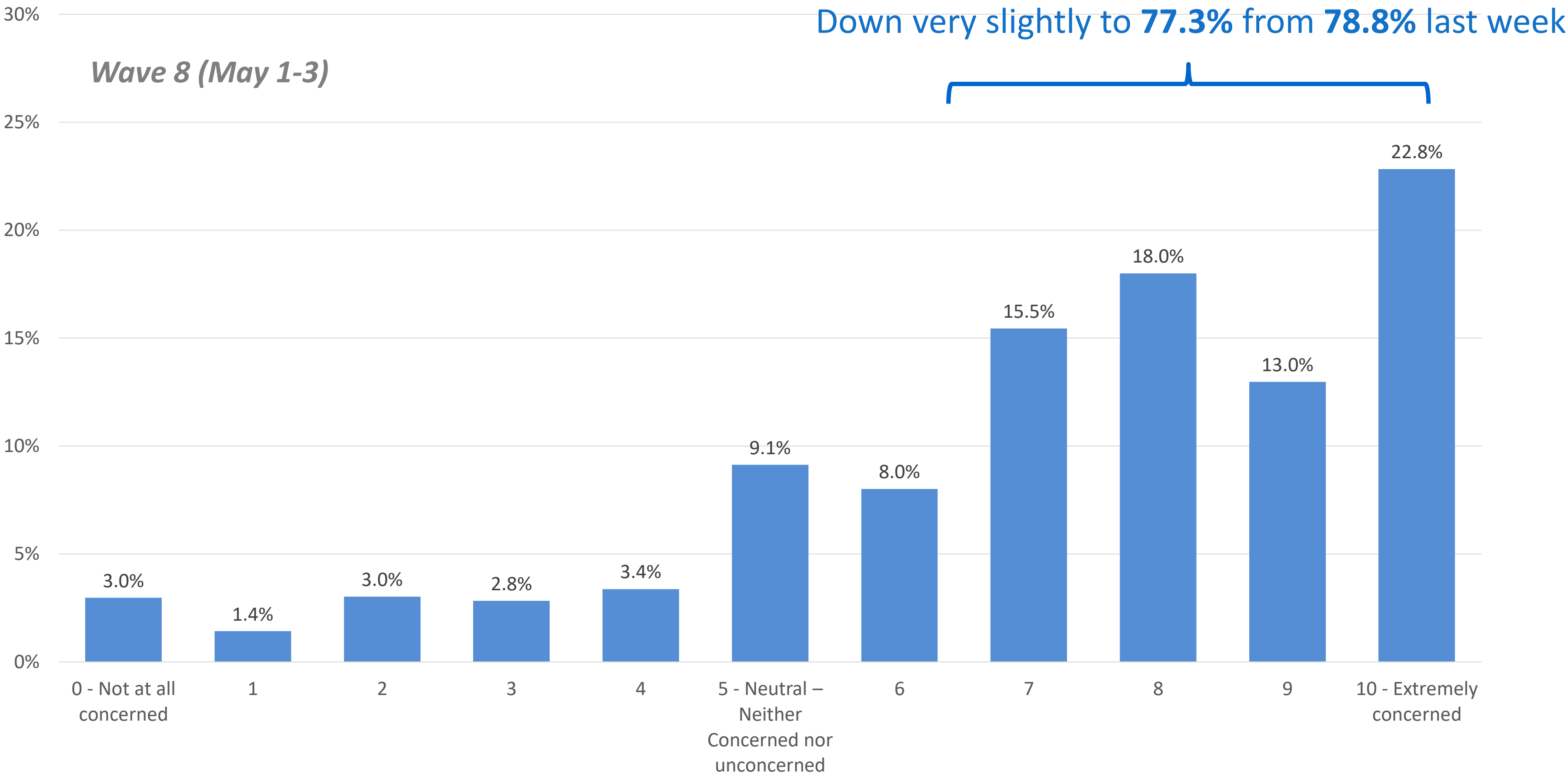


Health Concerns (Family & Friends)

For the fourth week in a row, concerns about the health of friends and family dropped again slightly, with 77.3 percent expressing concern for the safety of their loved ones, down slightly from 78.8 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 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

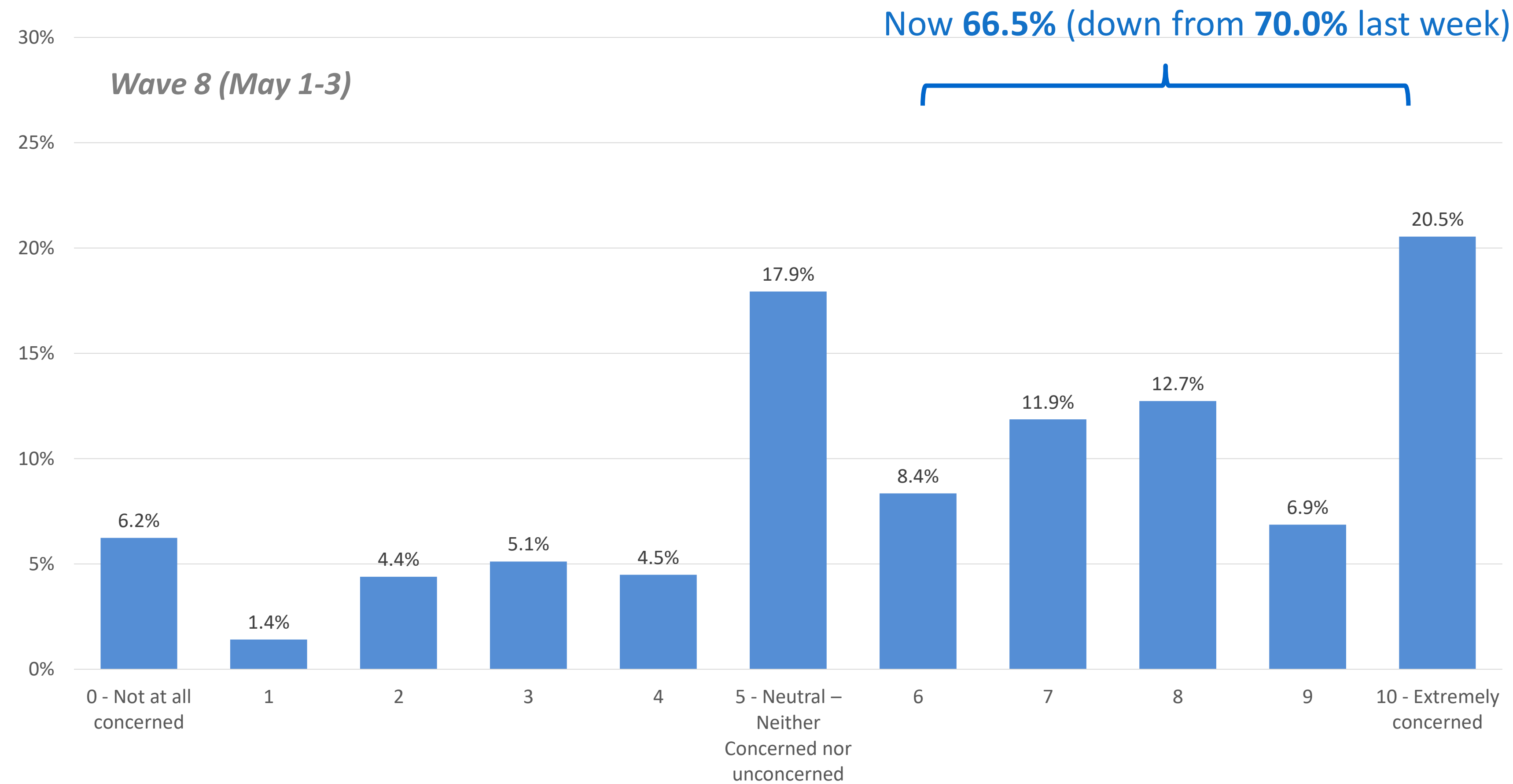


Concerns About Personal Finances

Concern that the pandemic will impact Americans’ personal finances decreased this week, moving from 70.0 percent to 66.5 percent.

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 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

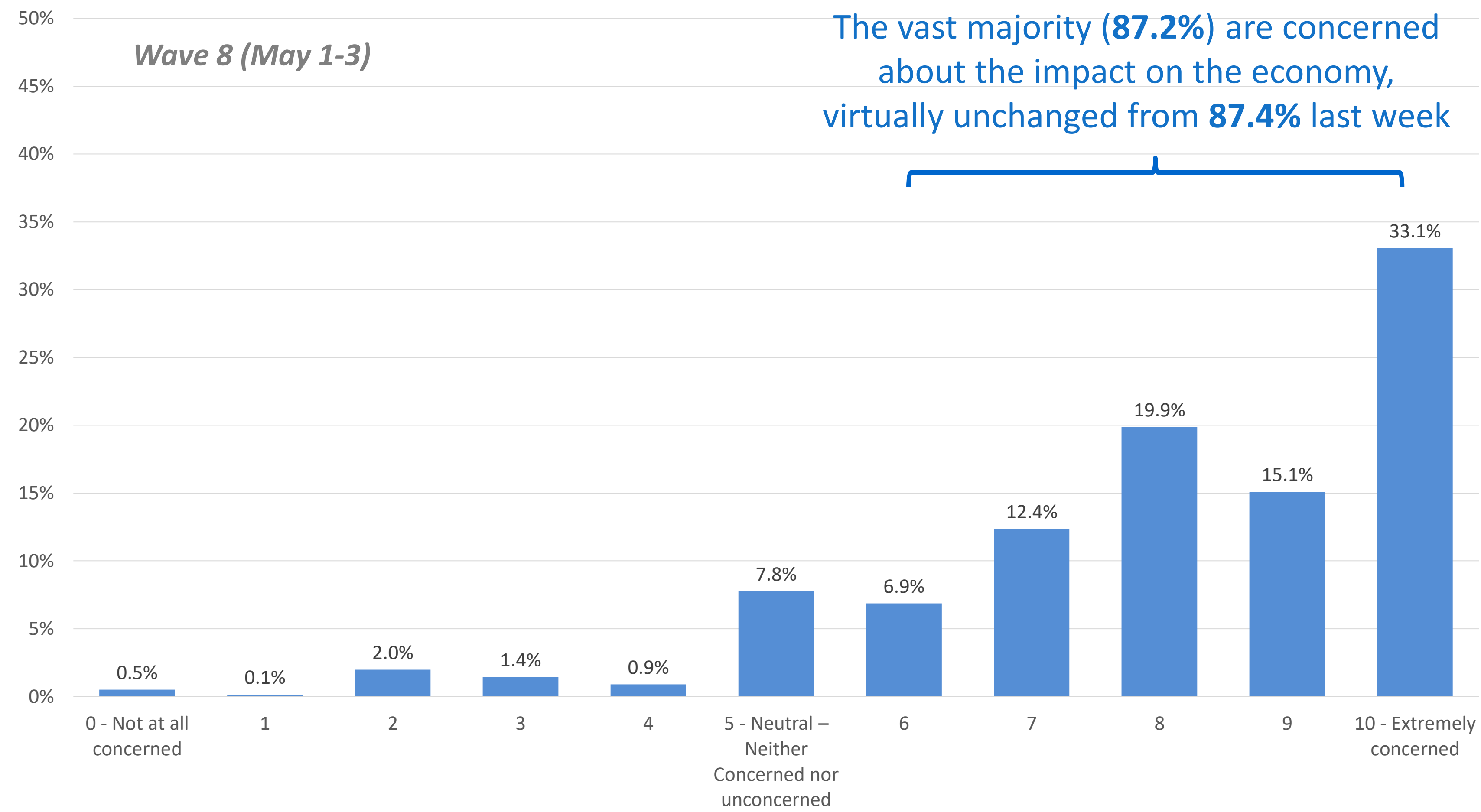


Concerns About National Economy

Concerns about the nation’s overall economic performance remain extremely high. Nearly 90 percent of travelers expressed some level of concern for the national economy.

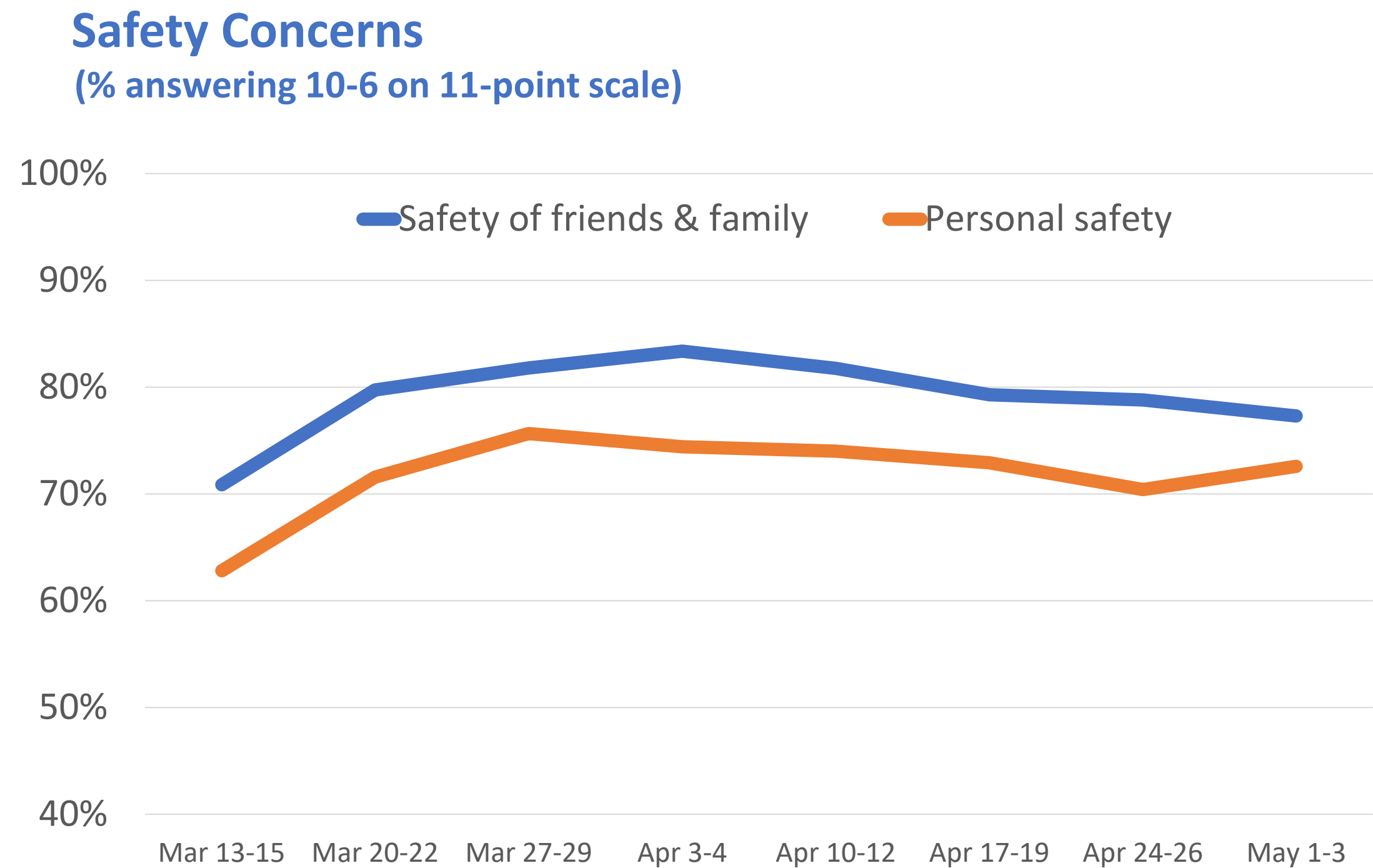
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

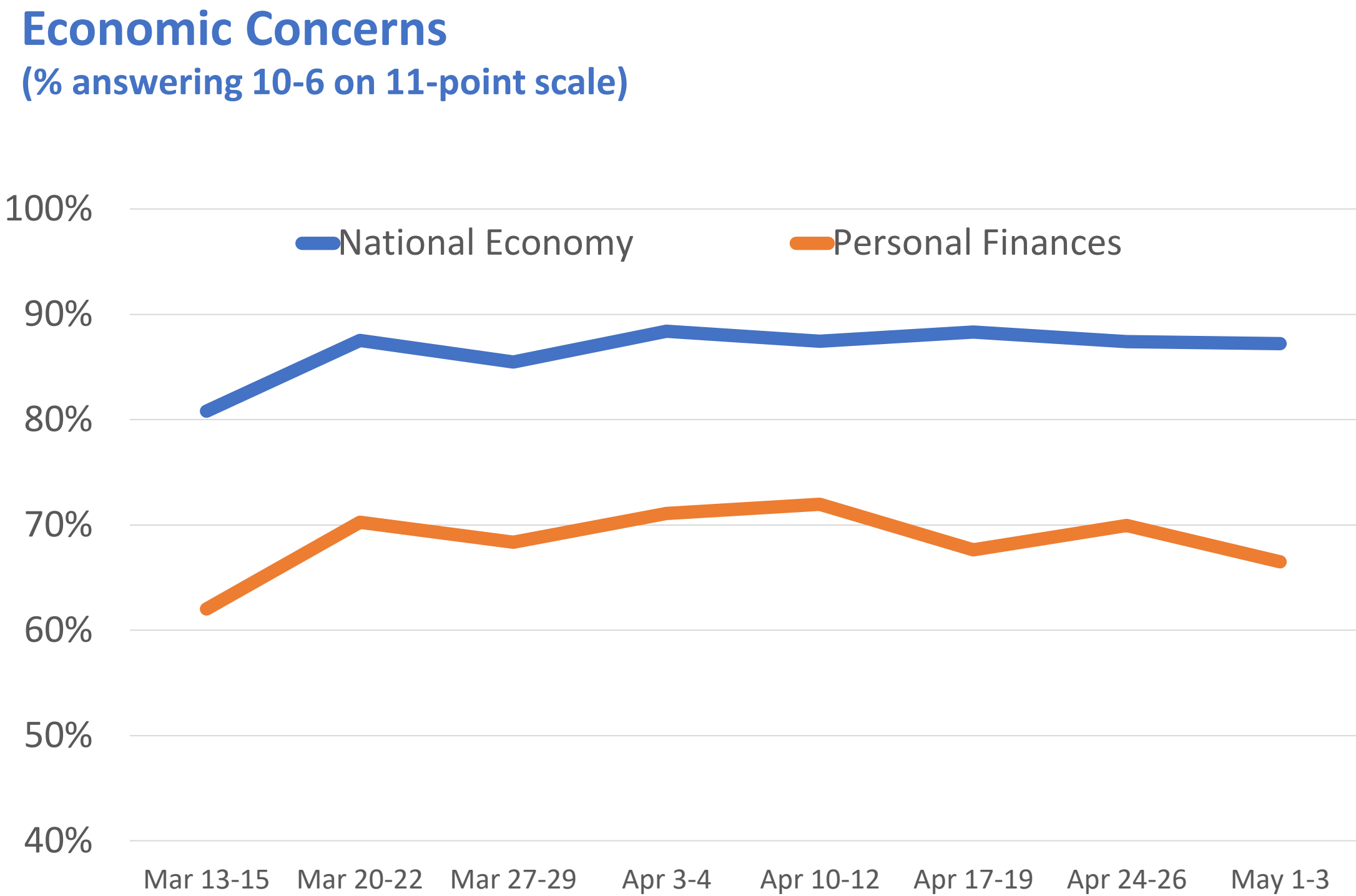


Summary: Personal vs. External Concerns

Summary charts for the survey’s four concern-metrics are shown below.



Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? **Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus?



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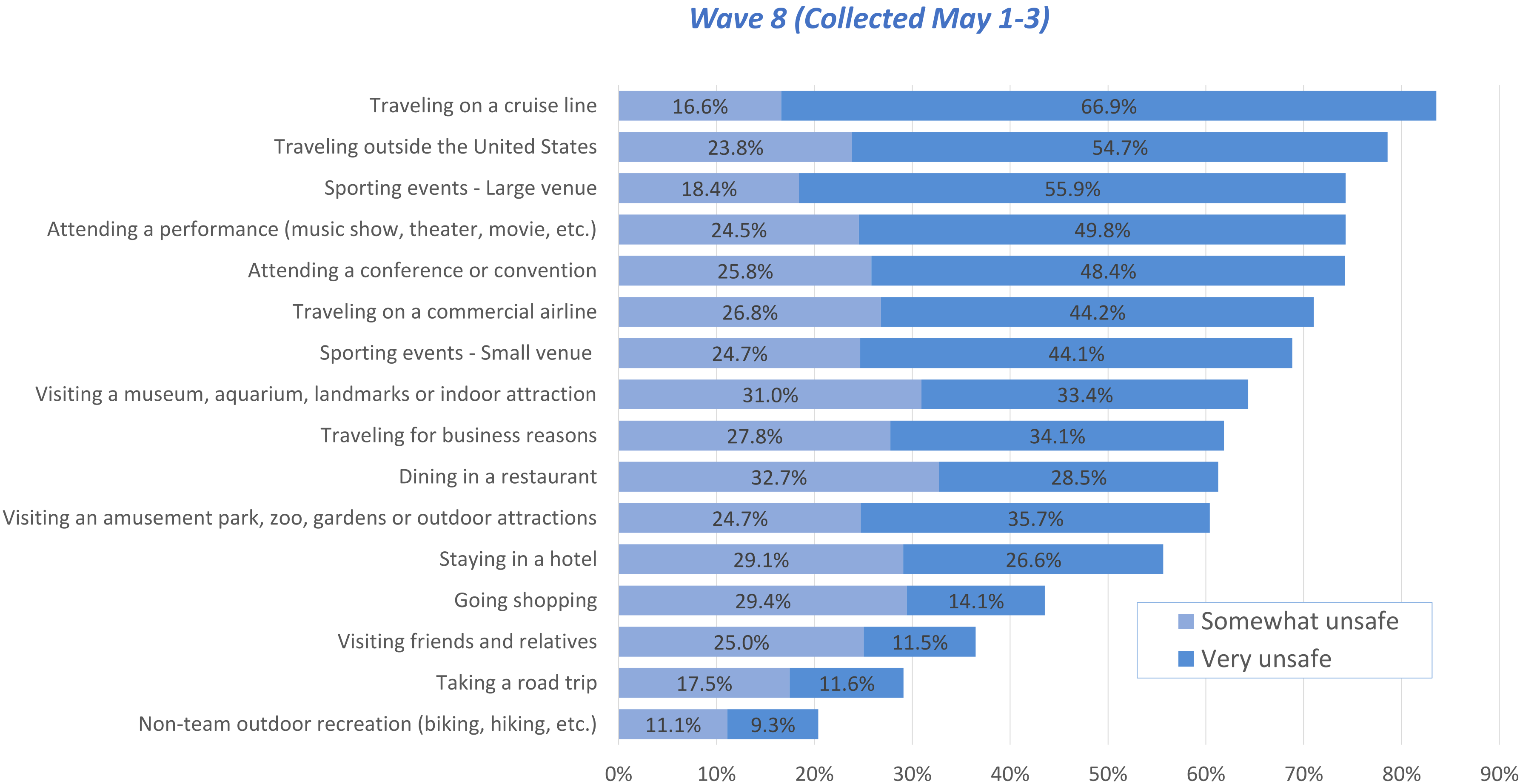
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Perceived Safety of Travel Activities (Wave 8)

Cruises continue to be seen as the least safe travel activity. 83.5 percent of American travelers say that traveling on a cruise is either “Somewhat unsafe” or “Very unsafe.”

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

(Base: Wave 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

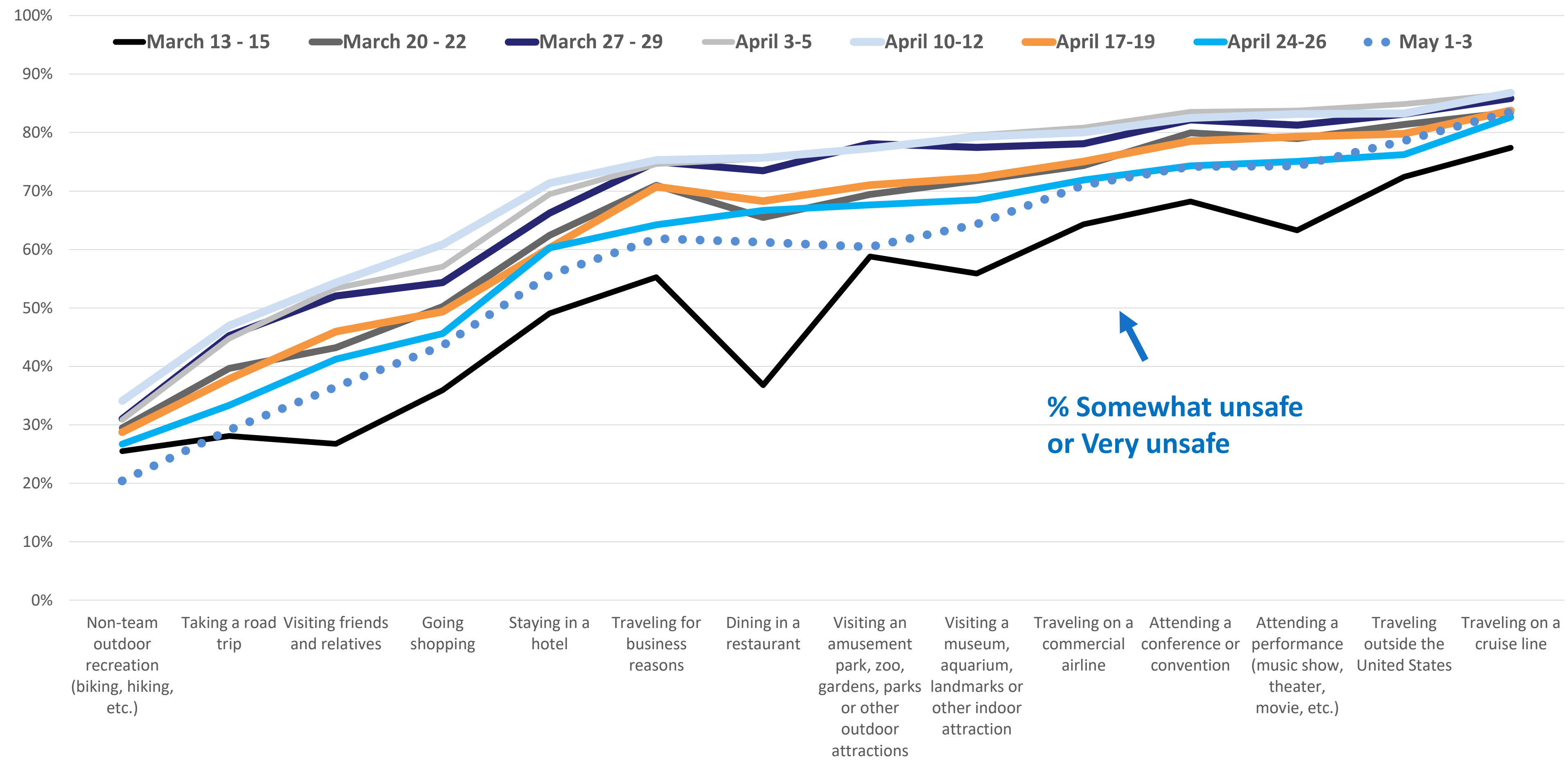


Perceived Safety of Travel Activities (Waves 1-8 Comparison)

The perceived safety of various travel activities improved again this week. In the eighth survey wave, the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe” decreased again.

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



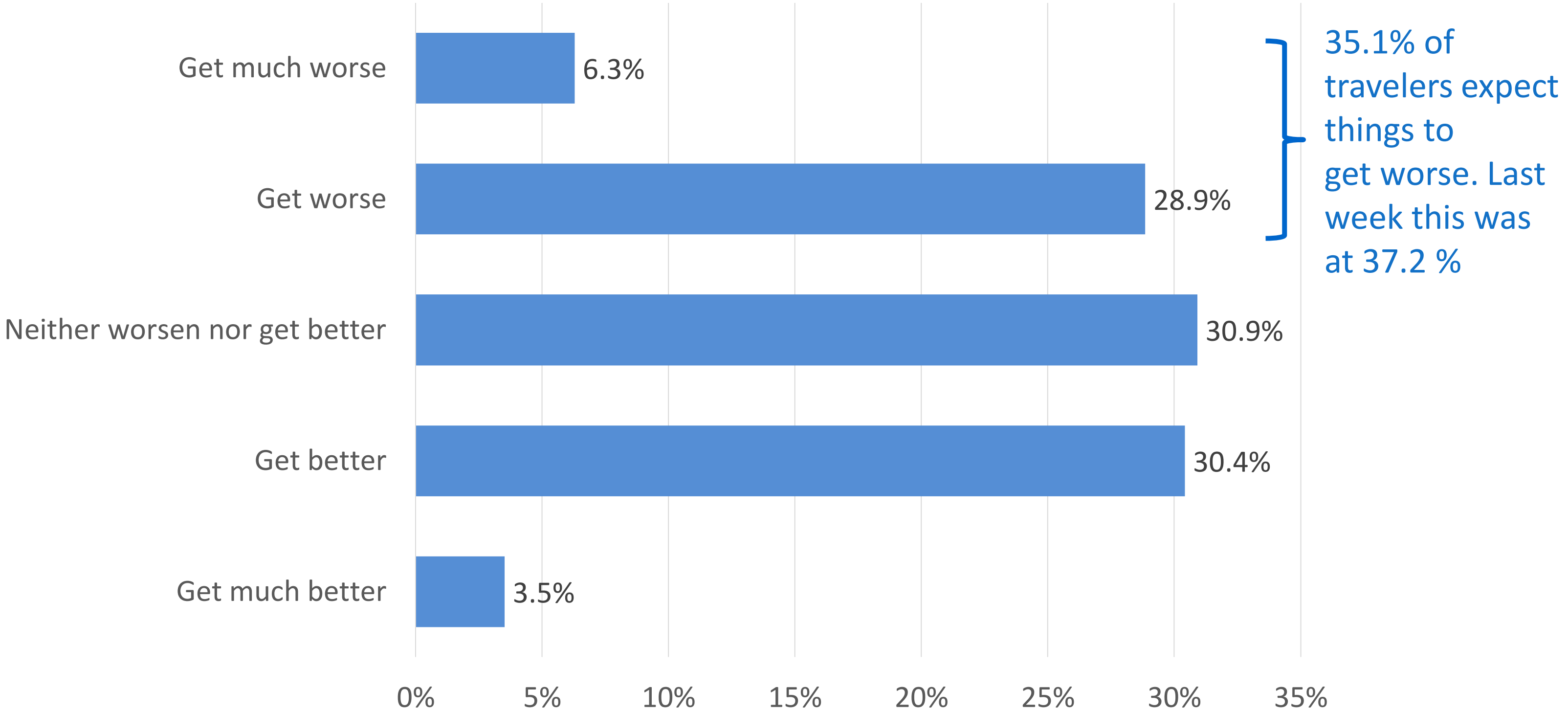
Expectations for the Coronavirus Outbreak

Overall traveler expectations for the pandemic’s severity improved this week. 35.1 percent expect the coronavirus situation to get worse in the next month, down from 37.2 percent last week.

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 _____

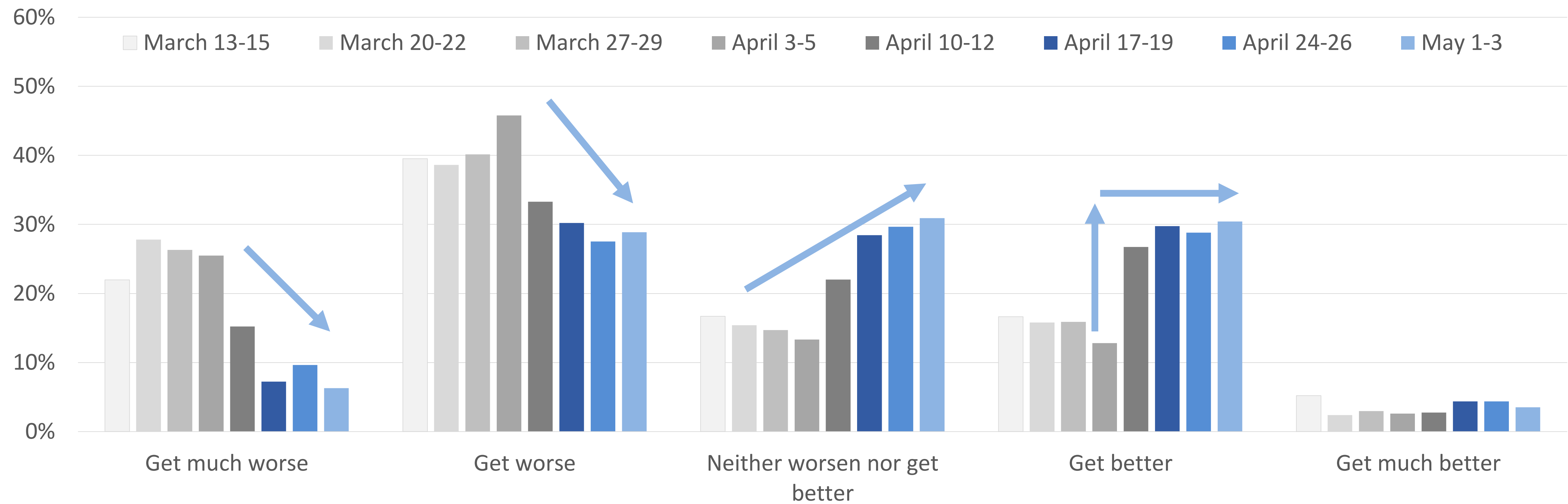
(Base: Wave 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



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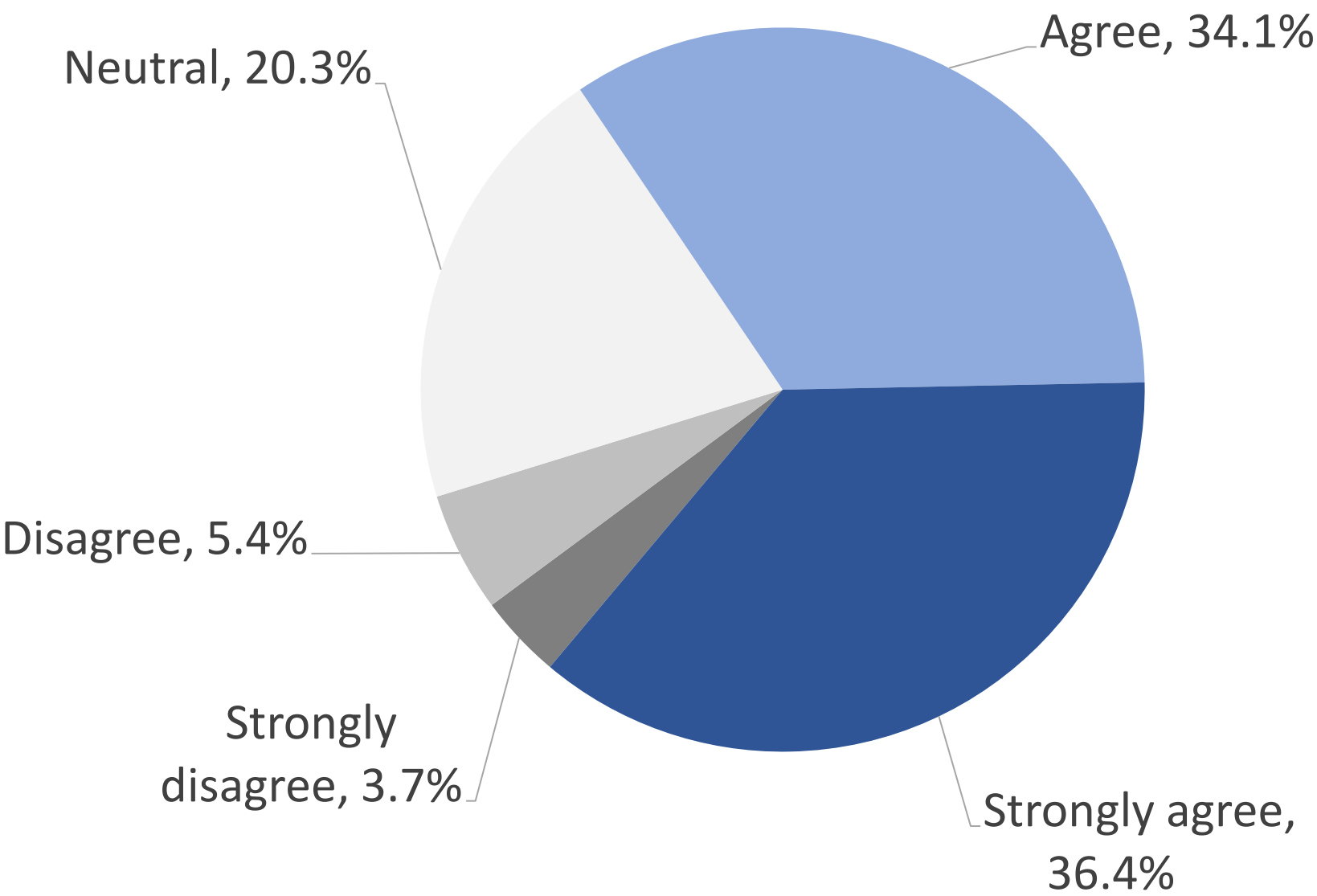
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Excitement to Get Back to Travel

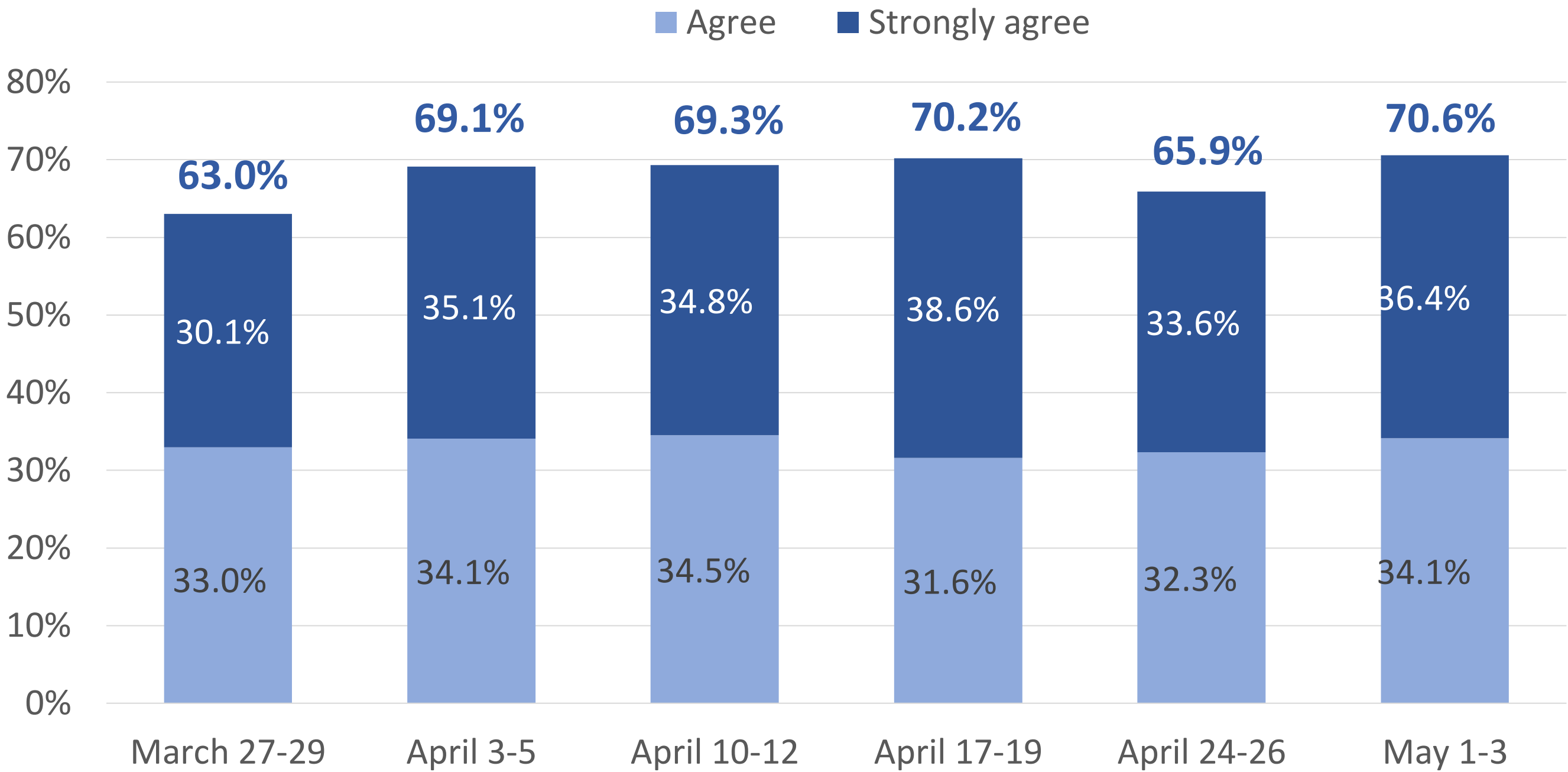
How much do you agree with the following statement?

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

Overall excitement to get back out on the road increased this week, as 70.6 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, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)





Section I I: Opinions on Re-opening for Business

Readiness to Fly on Commercial Airlines

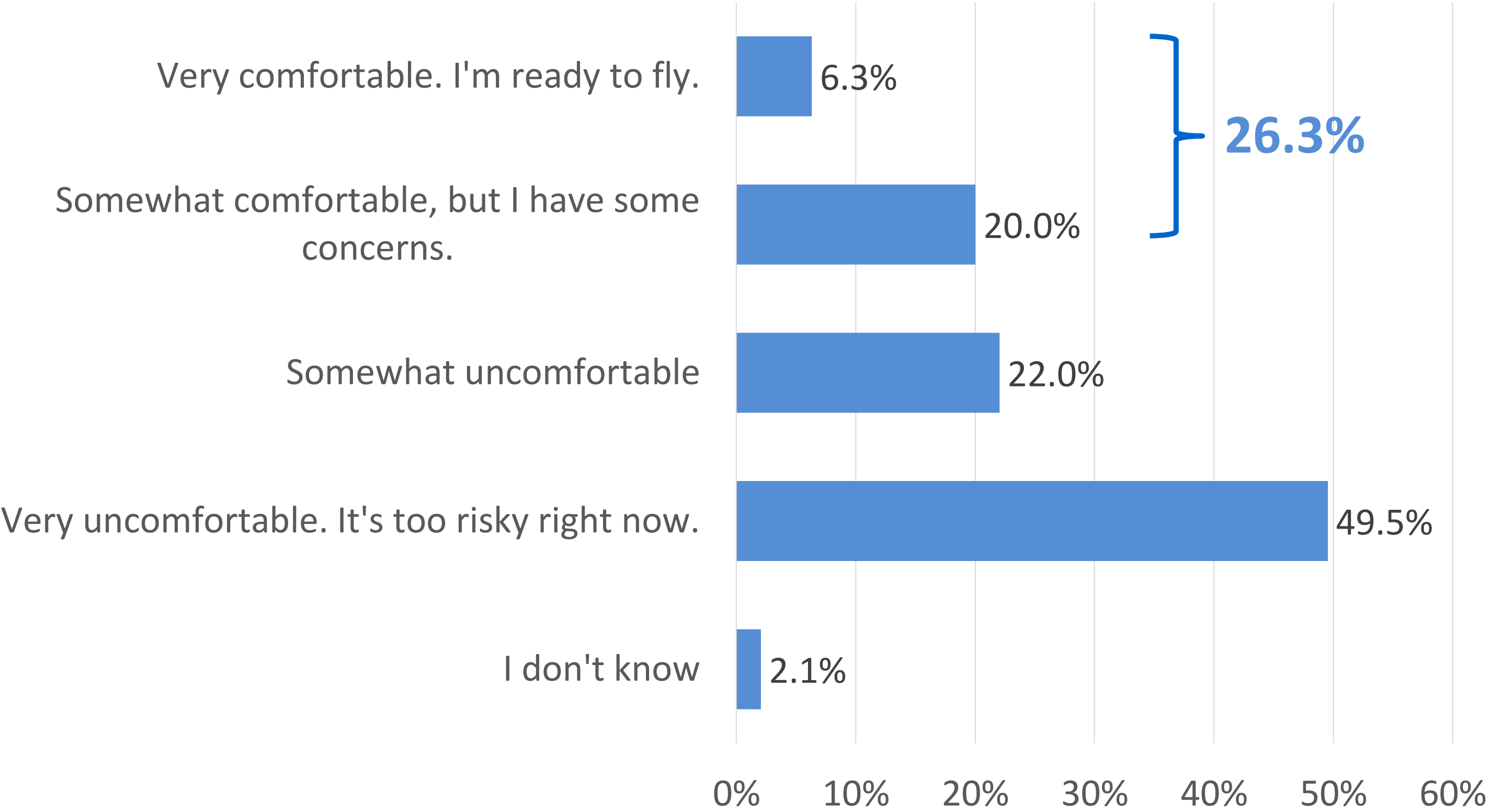
Despite their stated enthusiasm to get back out and travel, most American travelers appear to be reluctant to get back on airplanes.

Only about one-quarter (26.3%) say they would now be comfortable traveling on a commercial airline.

Question: Which best describes how you feel right now about traveling on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



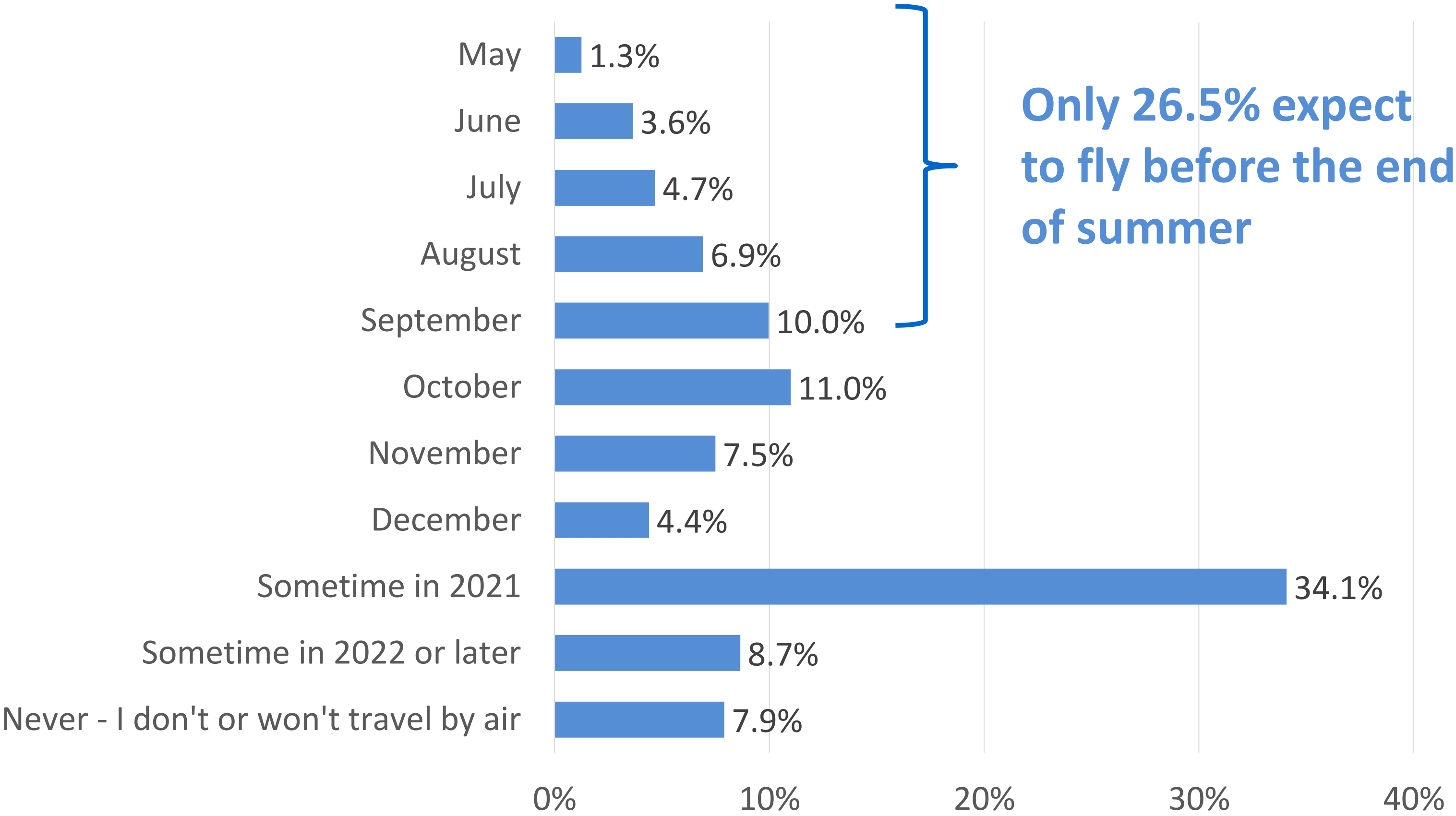
Next Flight on a Commercial Airline

There will likely be an uneven return to air travel by Americans. Half of American travelers feel it is too risky to travel on an airplane right now with, 42.8 percent saying their next trip by air will not be until 2021 or later.

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

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



Desired Operational Practices: Commercial Airlines

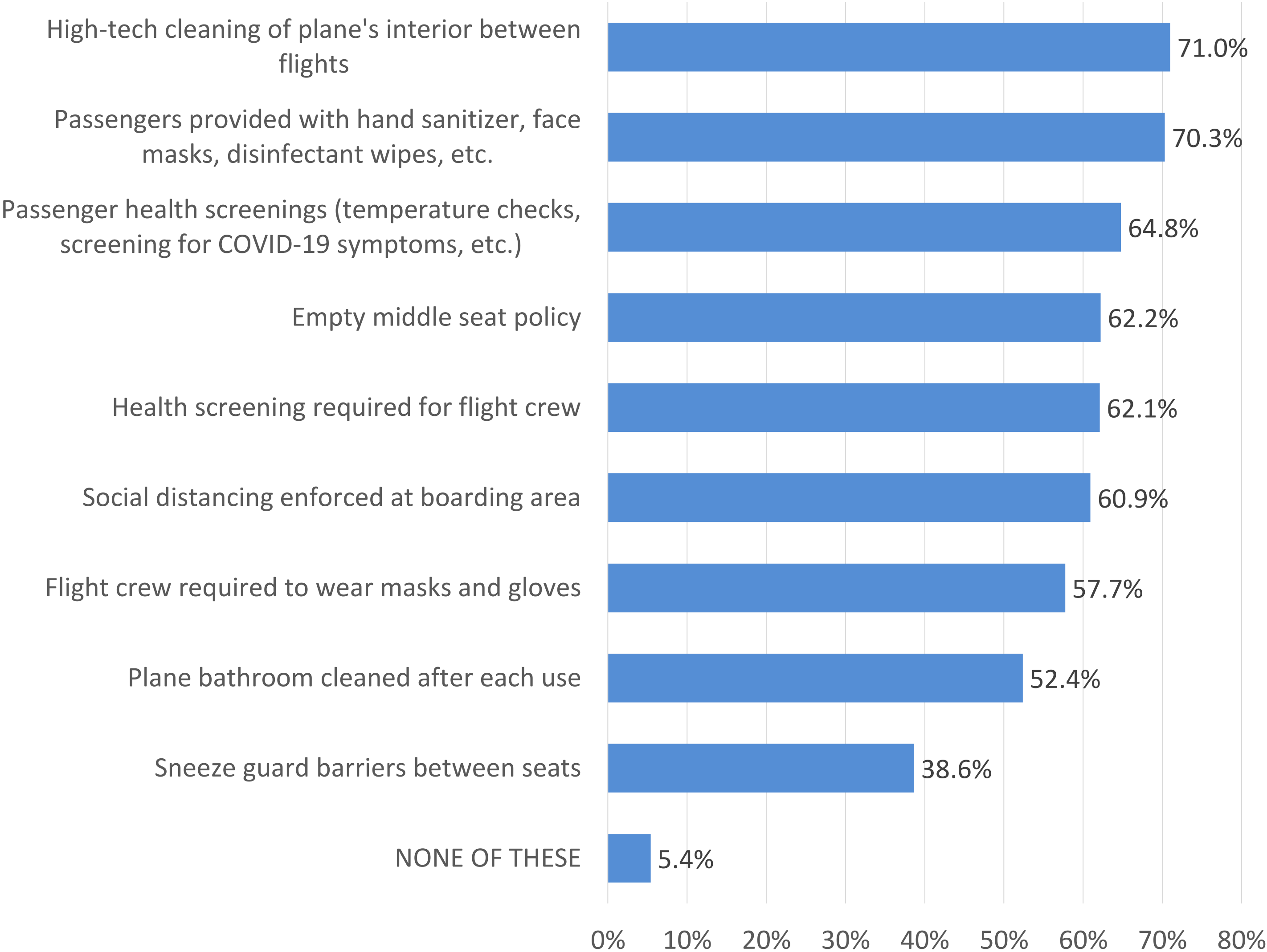
Airlines will need to consider an array of safety measures before attracting large crowds of the past back. The most popular idea amongst travelers in the use of high-tech cleaning protocols between flights.

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices do you think should be used?

Definition presented before the question: For the next question please consider **HIGH-TECH CLEANING PRACTICES** to be practices such as electrostatic sprayers with hospital-grade disinfectant or ultraviolet light technology used to sanitize surfaces in an airplane.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



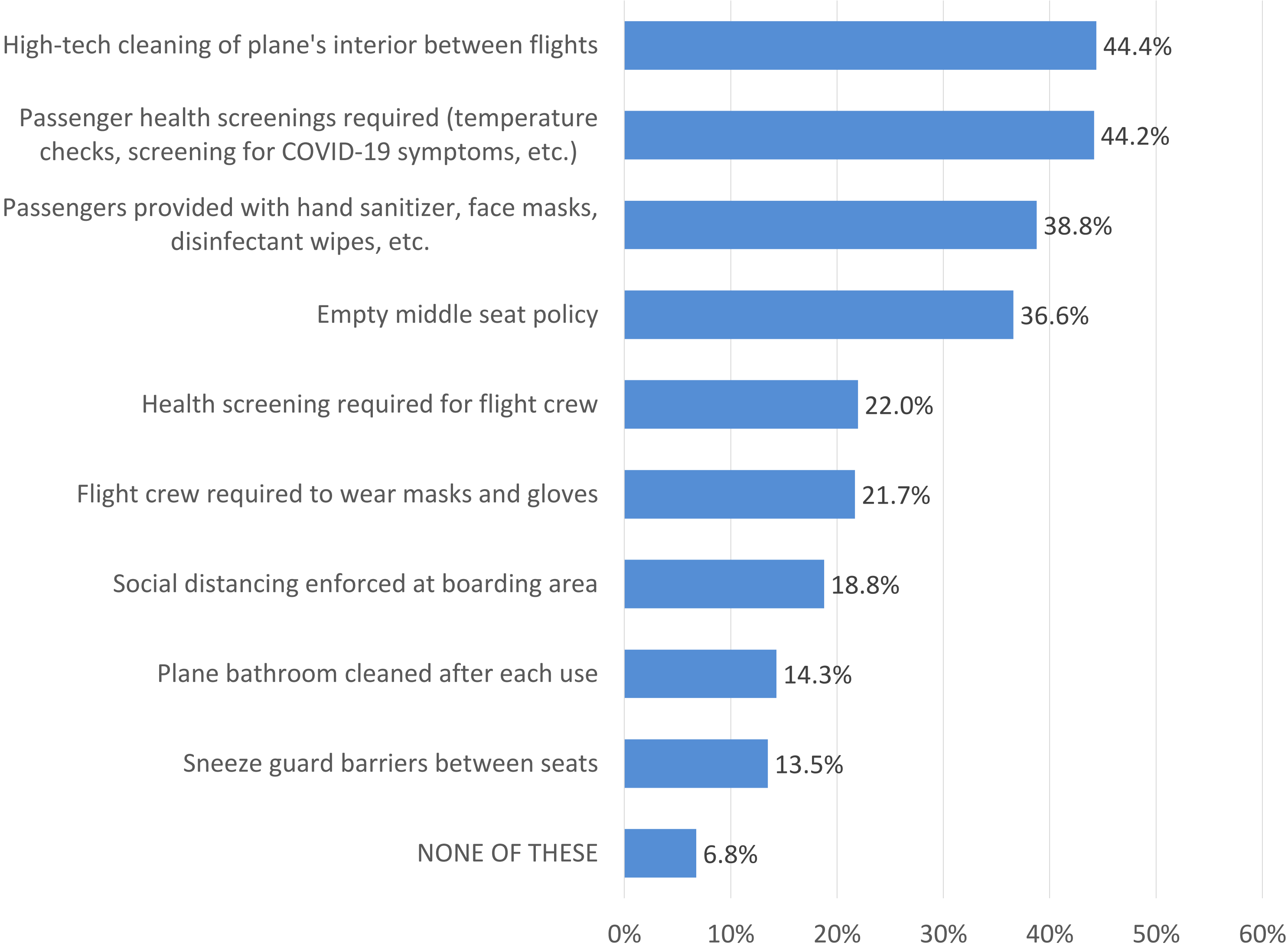
Most Important Operational Practices: Commercial Airlines

High-tech cleaning protocols were also the most important safety measure cited when travelers were asked what would make them feel the most comfortable that the airline was looking out for their health.

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the airline is looking out for your health? (Please select the 3 that would be most important to you)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



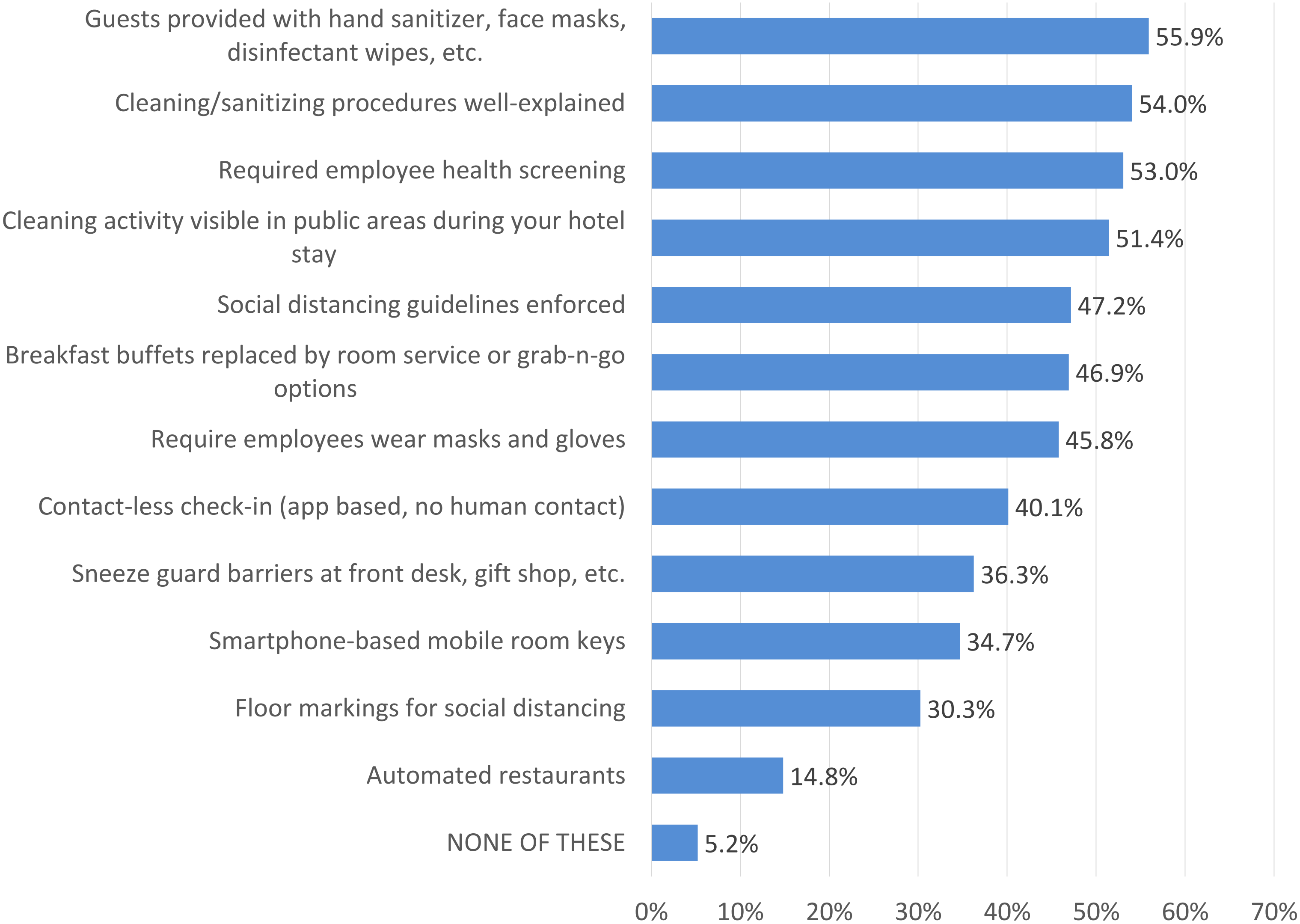
Desired Operational Practices: Hotels

Hotels face a similar challenge as airlines, and travelers most want hand sanitizers, face masks and disinfectant wipes to use, well-explained cleaning procedures and required health checks for employees.

Question: When staying in a hotel in the future, which operational practices do you think should be used?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



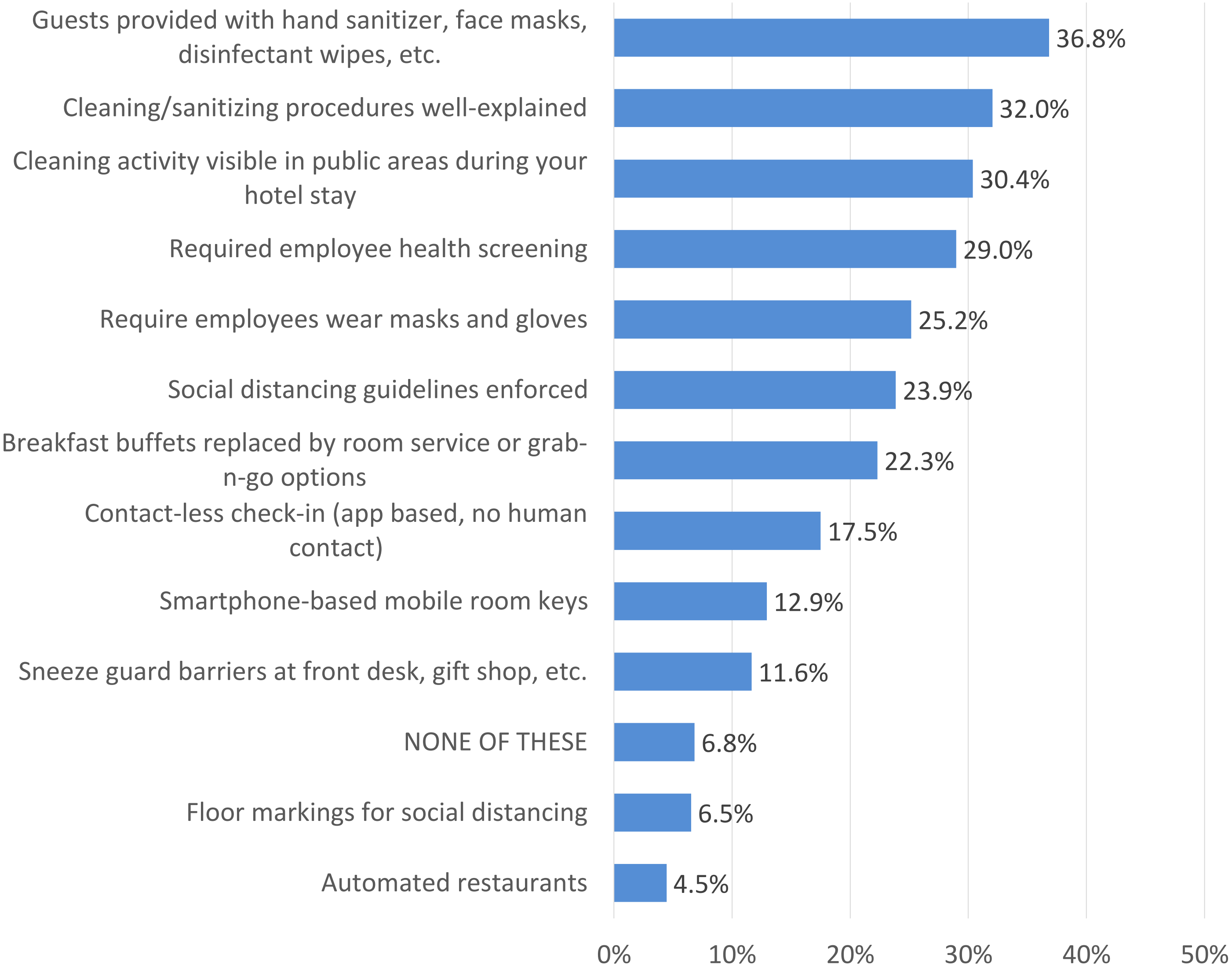
Most Important Operational Practices: Hotels

Similarly, hand sanitizers, face masks and disinfectant wipes to use, and well-explained cleaning procedures will be the most important ways a hotel can make travelers feel they are looking out for their health.

Question: When staying in a hotel in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the hotel is looking out for your health? Please select the practices that would be most important to you.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



Importance of High-tech Cleaning Protocols

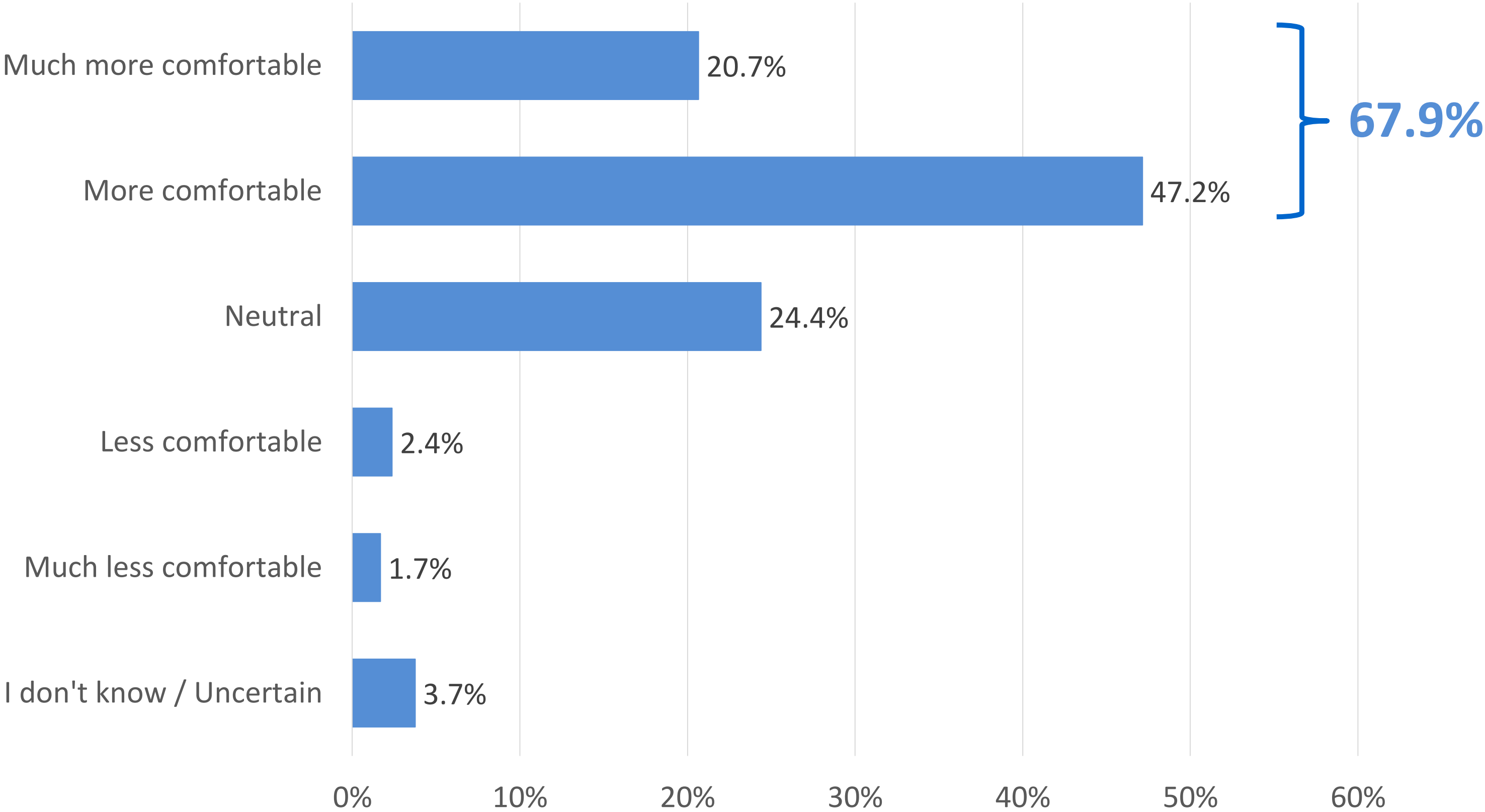
Hotel guests are likely to find high-tech cleaning practices a valuable service provided by hotels. Over 2-in-3 state that this would make them feel more comfortable staying in a hotel.

Question: Suppose a hotel used such high-tech cleaning practices. How would that affect your comfort level in staying at that hotel?

Definition presented before the question: For the next question please consider HIGH-TECH CLEANING PRACTICES to be practices such as electrostatic sprayers with hospital-grade disinfectant or ultraviolet light technology used to sanitize surfaces in guest rooms and public areas.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



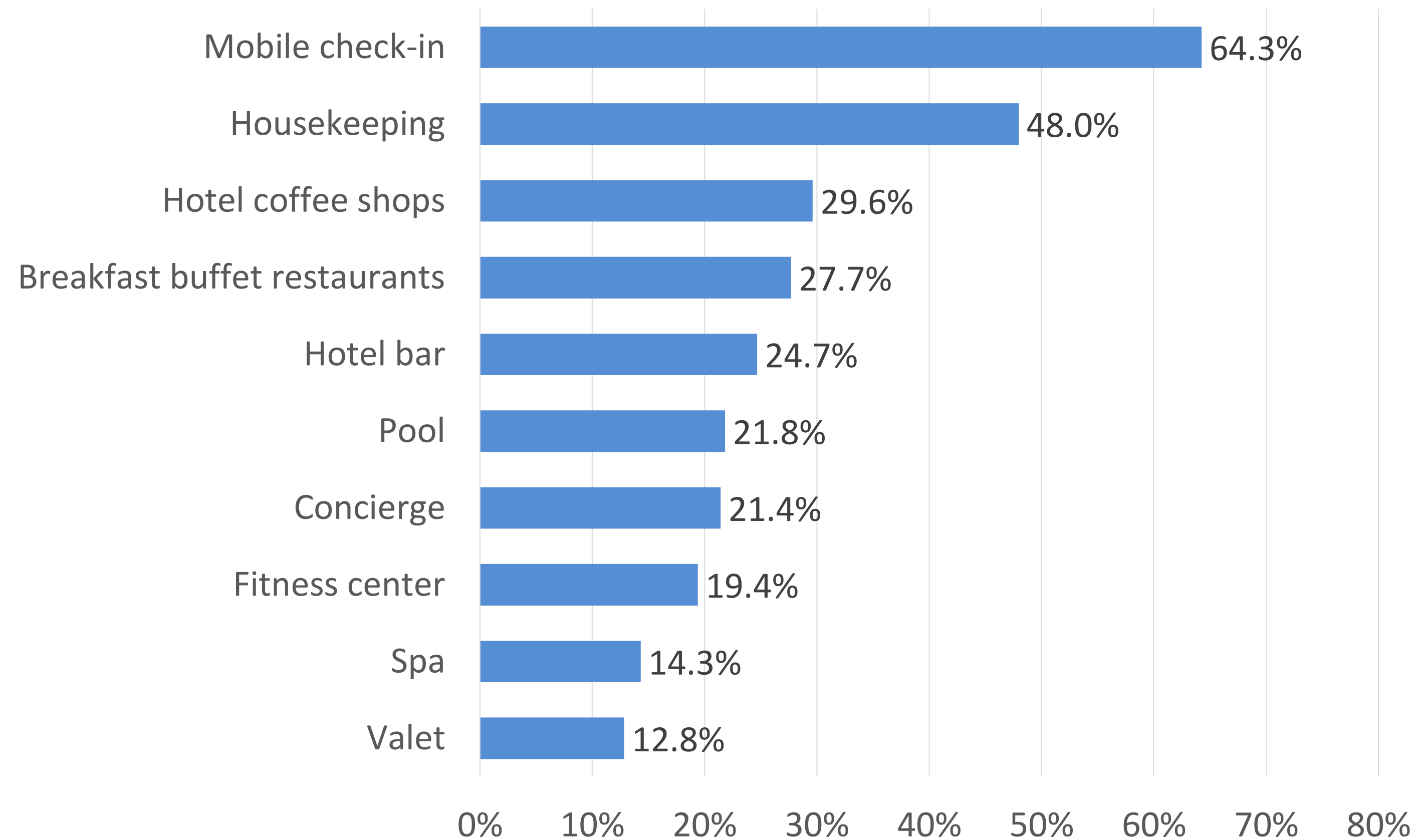
Services During Next Hotel Stay

Mobile check-in appears to be a very popular concept with travelers. When asked which of a list of services they intended to use on their next hotel stay, 64.3 percent said they would check-in using their mobile device.

Question: The next time you stay in a hotel, how likely would you be to use these features/services?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



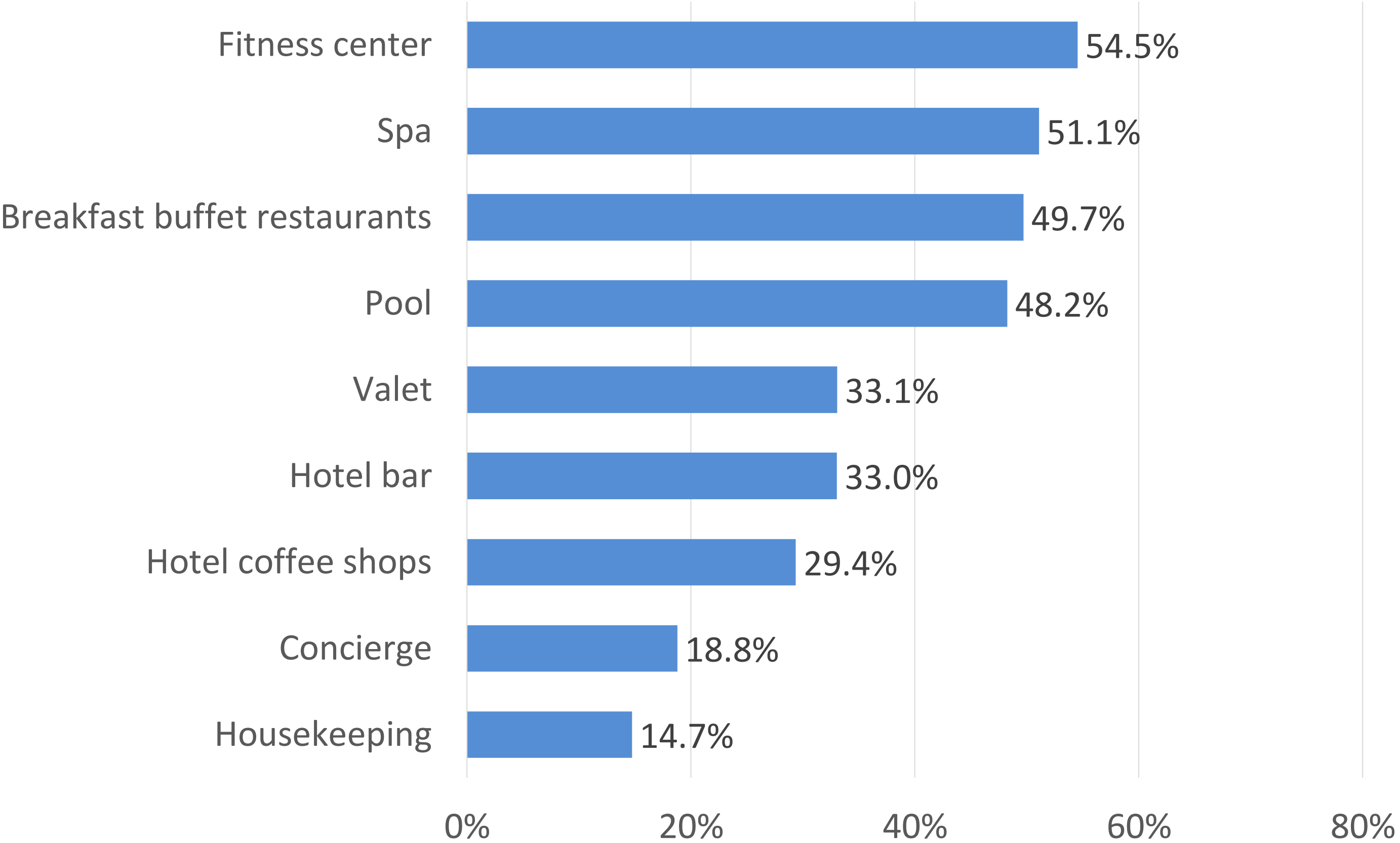
Hotel Services Impacted by Coronavirus Situation

Fitness centers and spas in hotels may see greatly diminished use in the wake of the coronavirus. When asked which hotel services they would be less likely to use due to the pandemic, fitness centers (54.5%) and spas (51.1%) were the most frequently cited services. Breakfast buffets were also cited by 49.7 percent of travelers.

Question: The next time you stay in a hotel, which features/services (IF ANY) will you be **LESS LIKELY TO USE** as a result of the coronavirus situation? (Select all that apply)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



Withholding Future Business if Dissatisfied

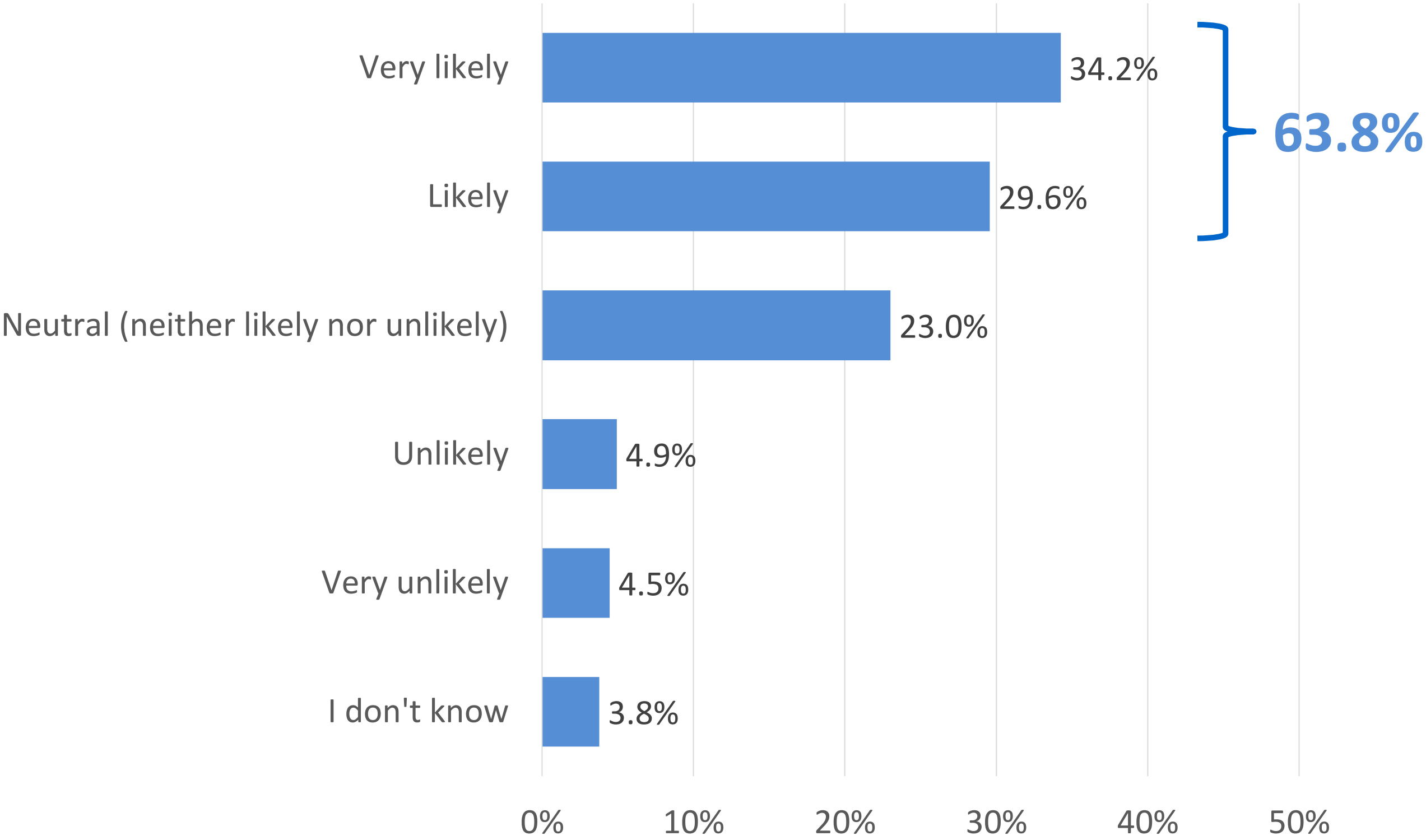
Like most consumers, travelers expect travel brands to satisfy their needs, and if unhappy, are likely to buy from the brand’s **competition**. Nearly 2-in-3 travelers say that if a travel company doesn’t take health considerations seriously, they are likely to withhold future purchases.

Question: In the coming months, suppose a business (a restaurant, retail store, airline, hotel, etc.) operates in a way that **DOES NOT MAKE YOU FEEL CONFIDENT** that they are looking out for your health.

How likely would you be to withhold future purchases from that business?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



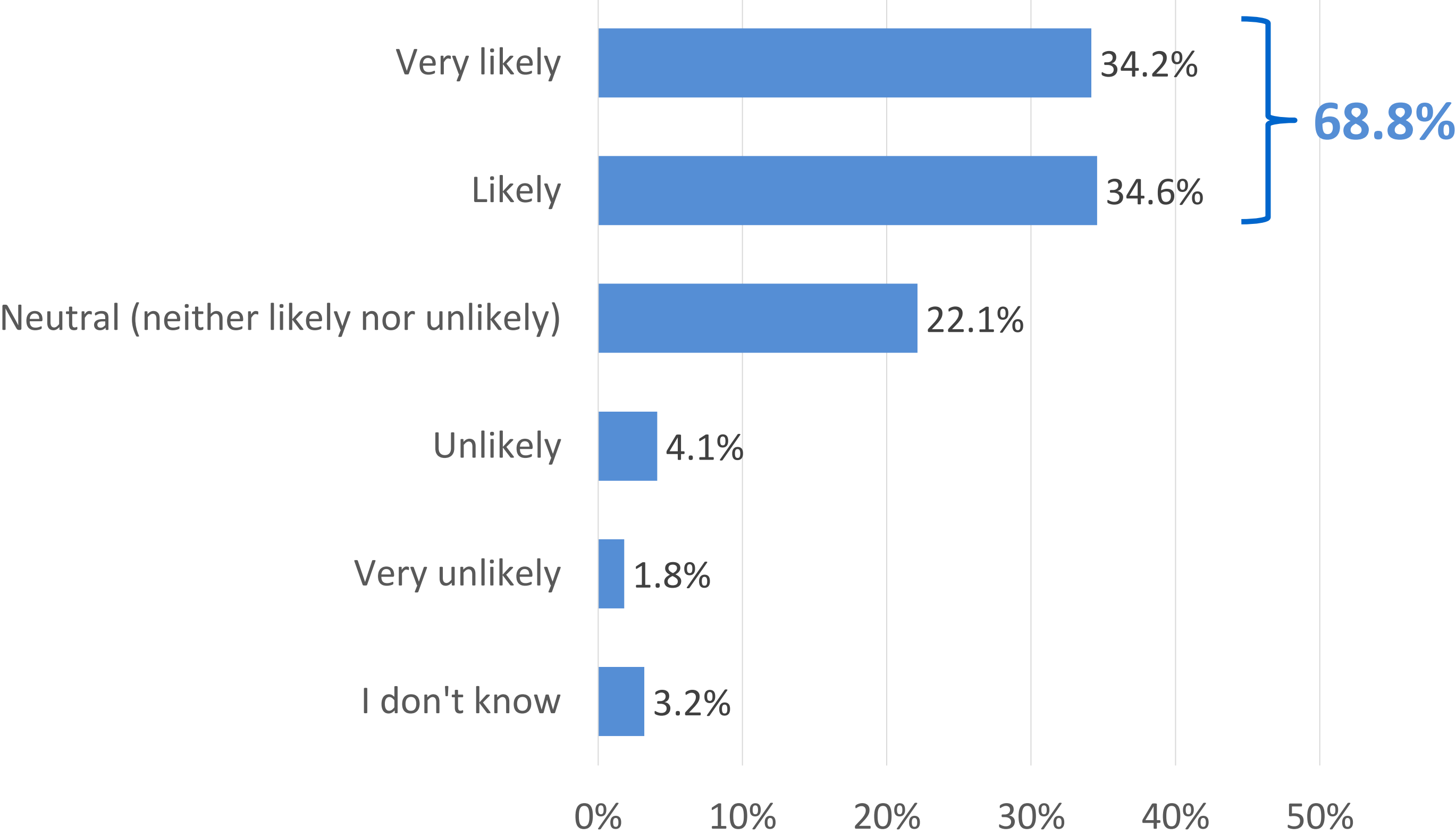
Complaining to Friends & Relatives Business if Dissatisfied

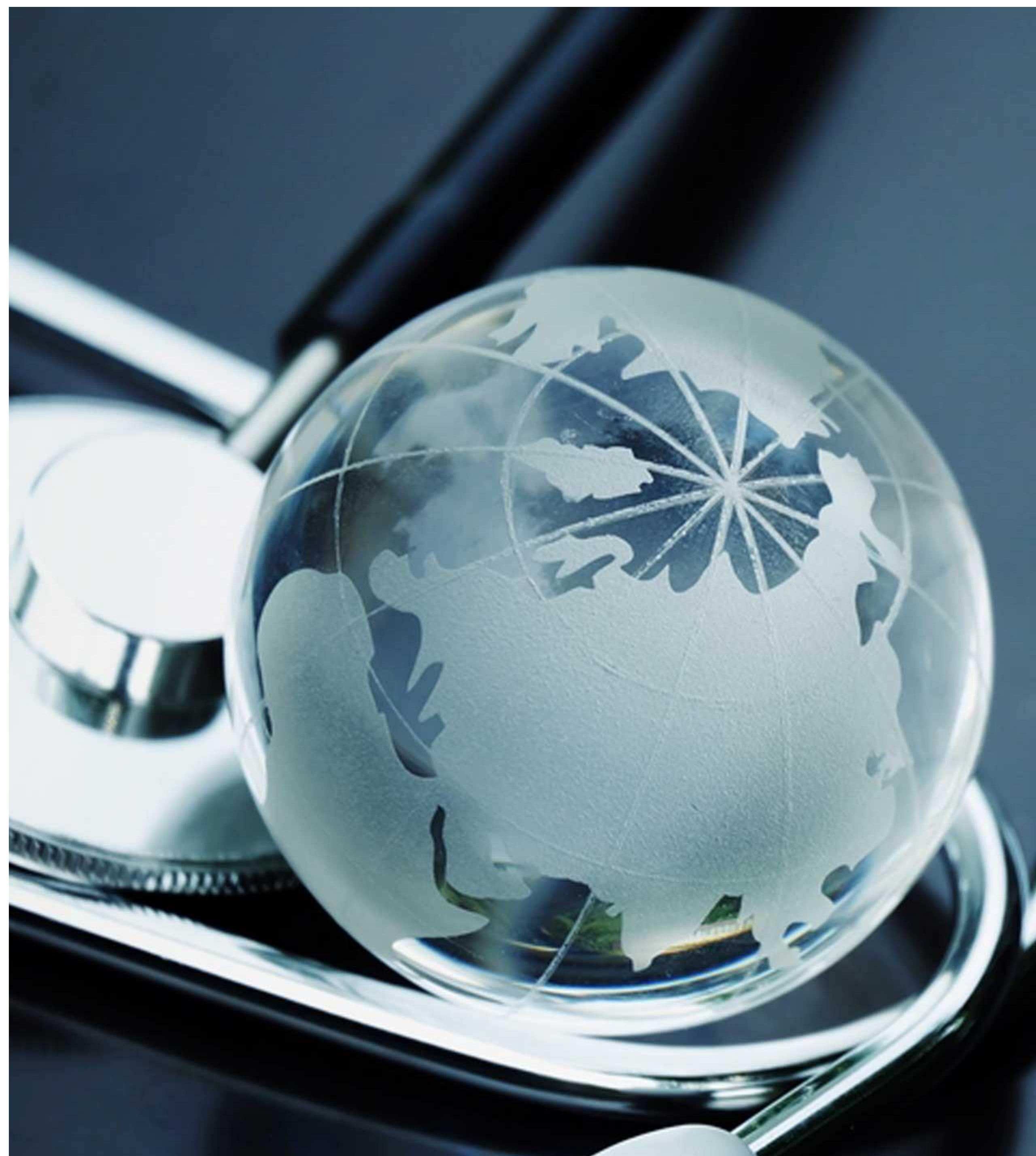
Similarly, 68.8 percent of travelers say they would be likely to complain to friends and relatives if they have such a negative experience with a travel business.

Question: How likely would you be to tell your friends or relatives about your negative experience with that business?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



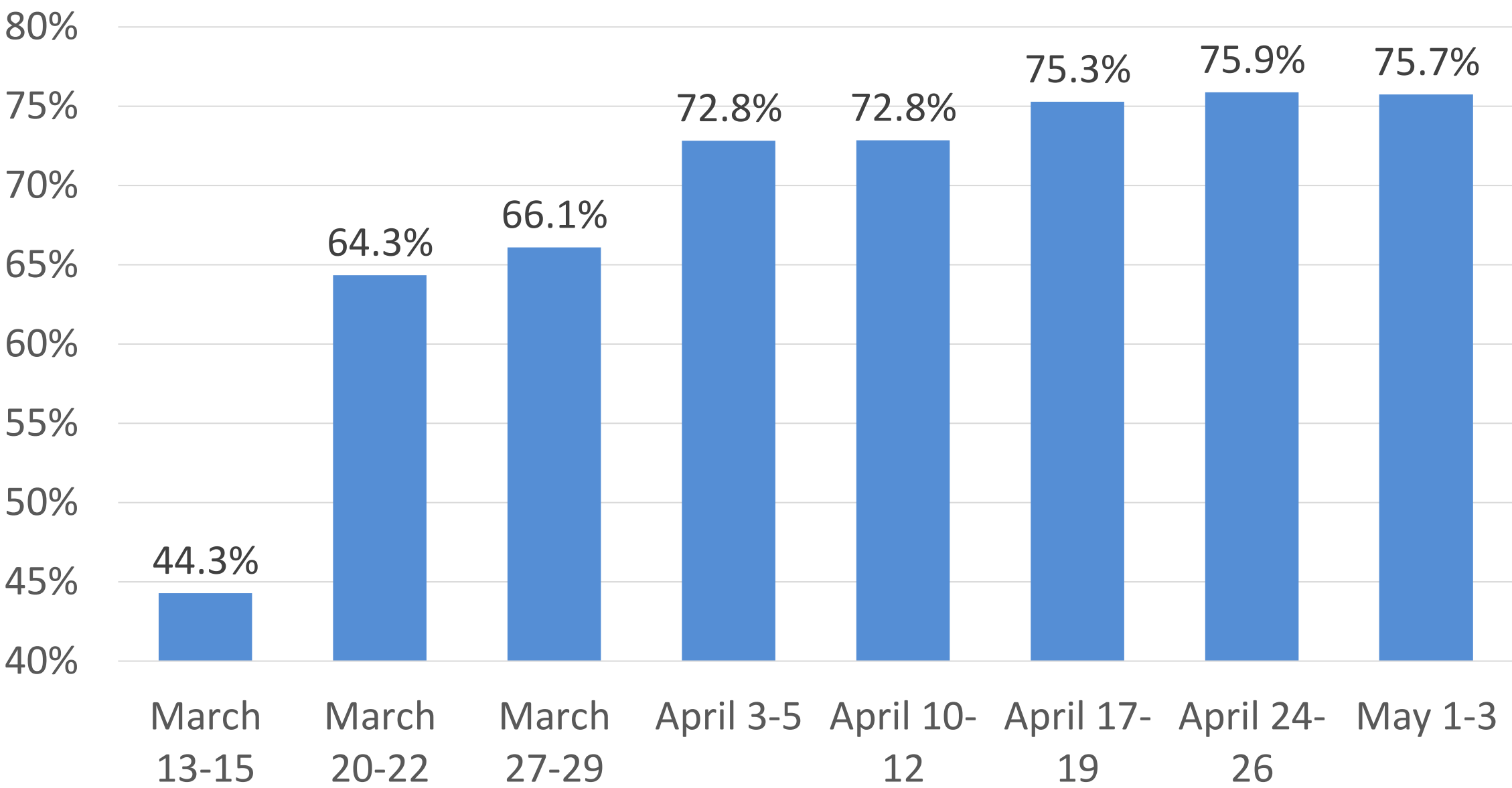
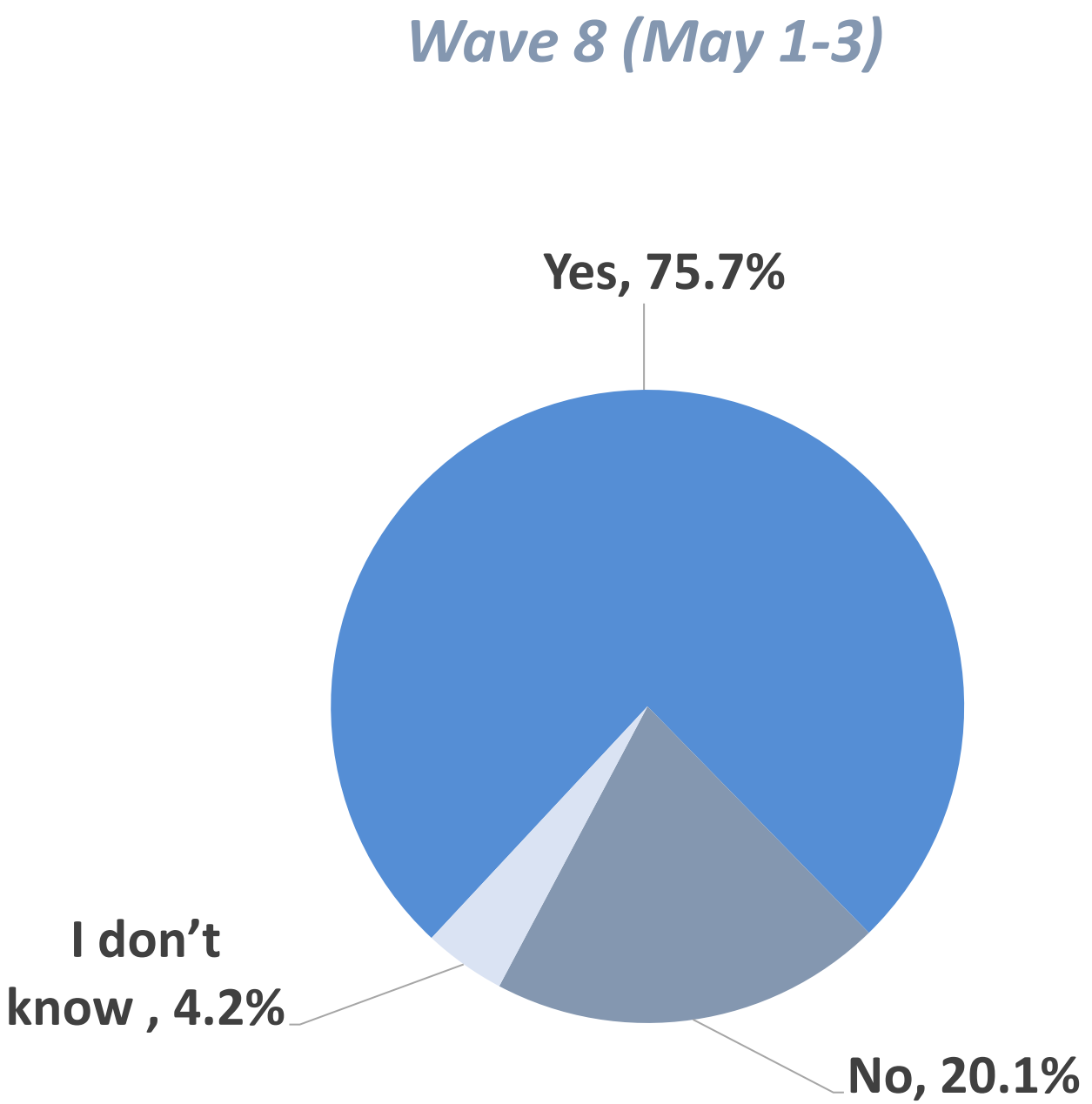


Section III: Impacts on Travel

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 eighth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus remained unchanged at 75.7 percent.



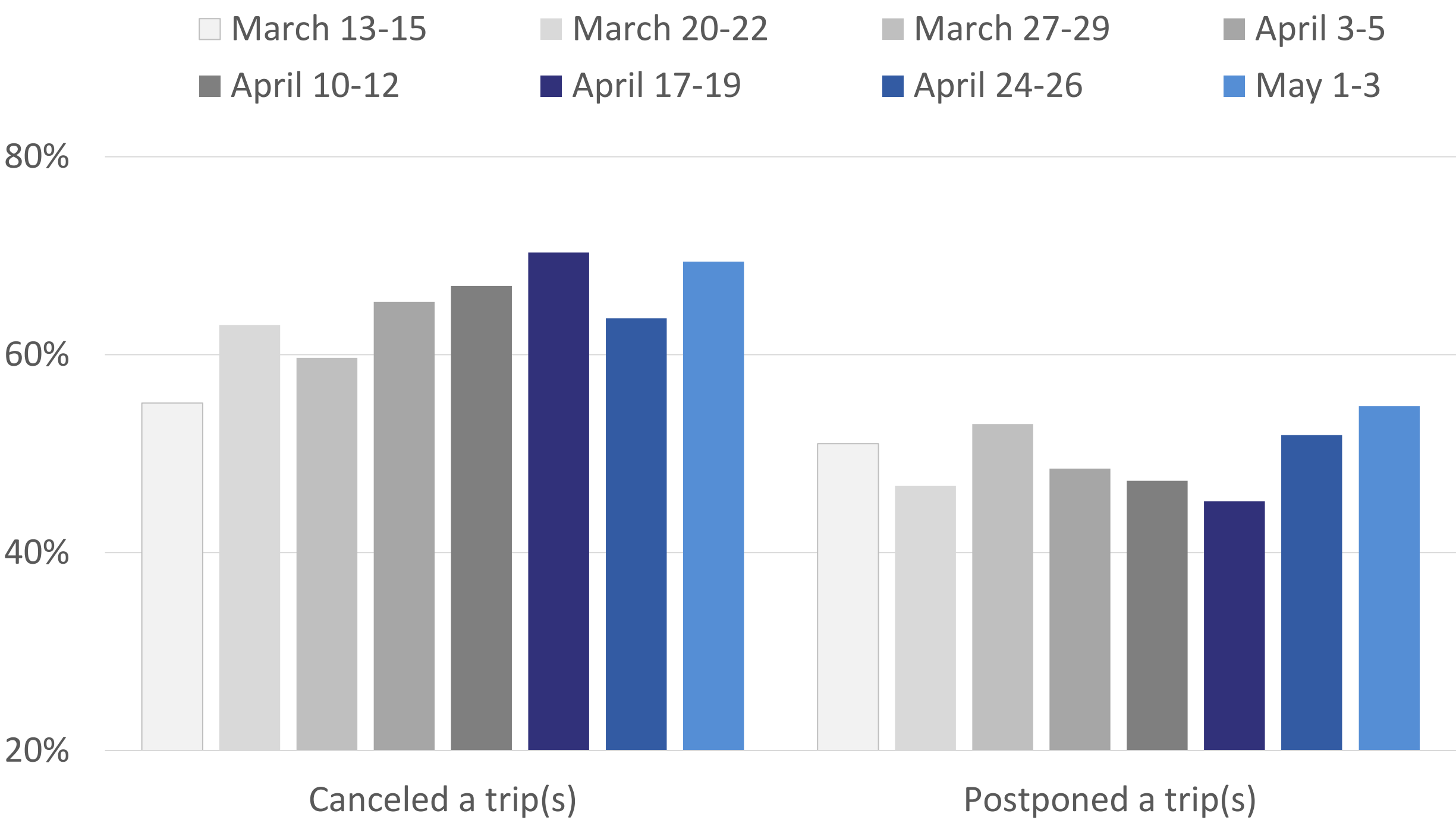
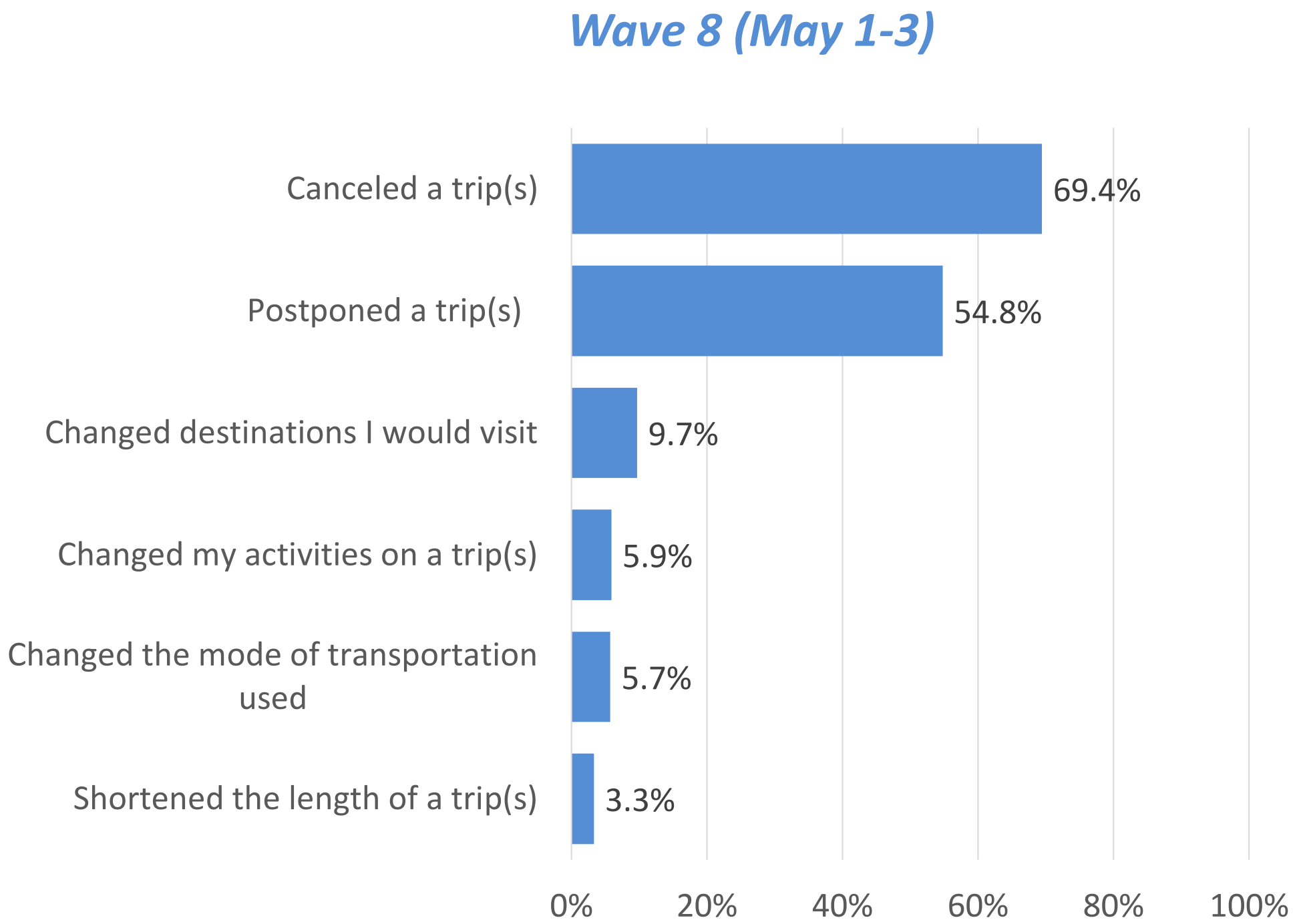
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

How the Coronavirus has Impacted Travel

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

Due to the coronavirus situation, I have_____.

This week, the proportion of American travelers reporting they have cancelled trips due to the coronavirus grew to 69.4 percent from 63.7 percent last week.



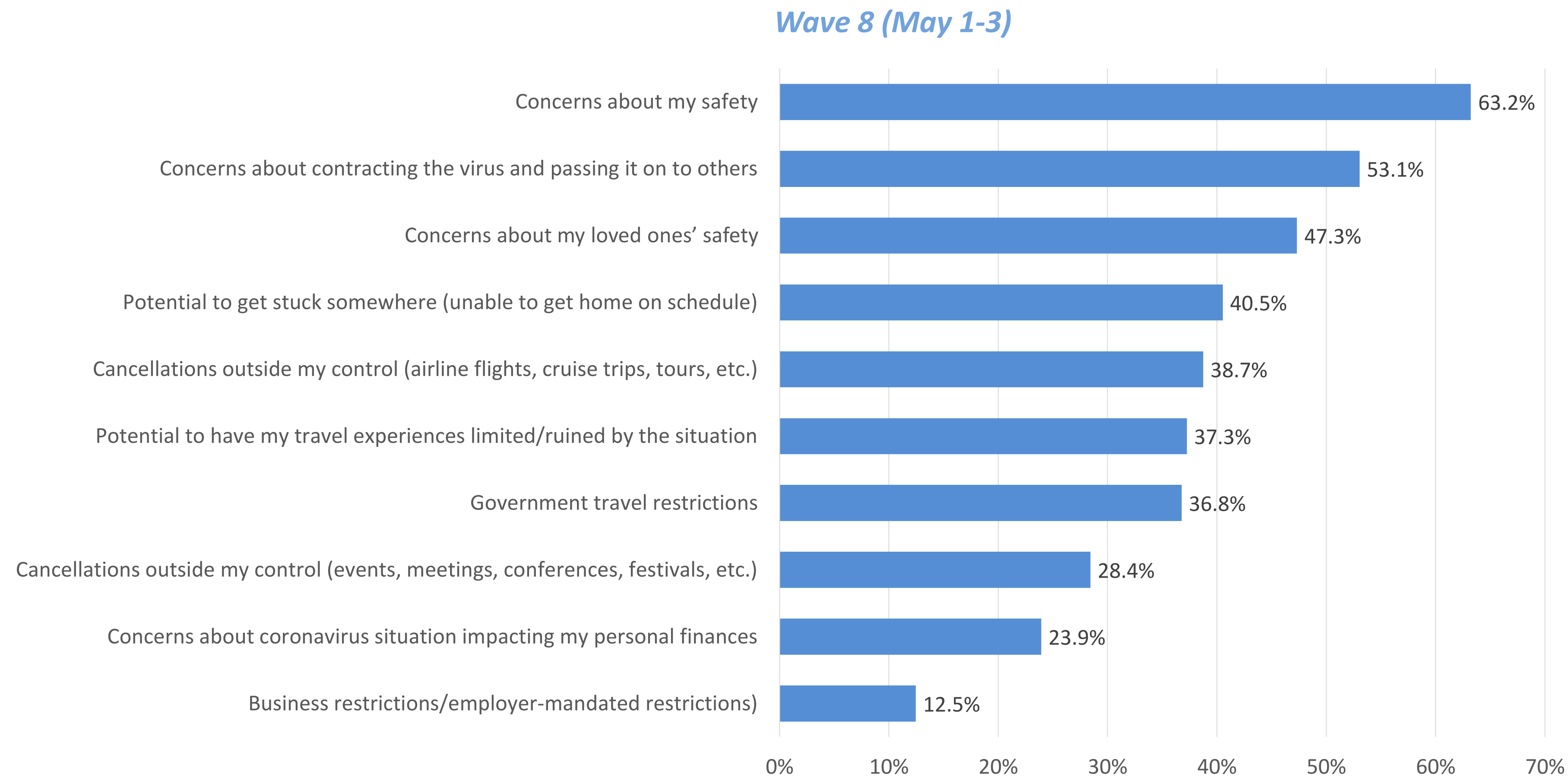
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Why the Coronavirus is Impacting Travel

Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with nearly two-thirds of respondents citing it as a reason (63.2%).

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

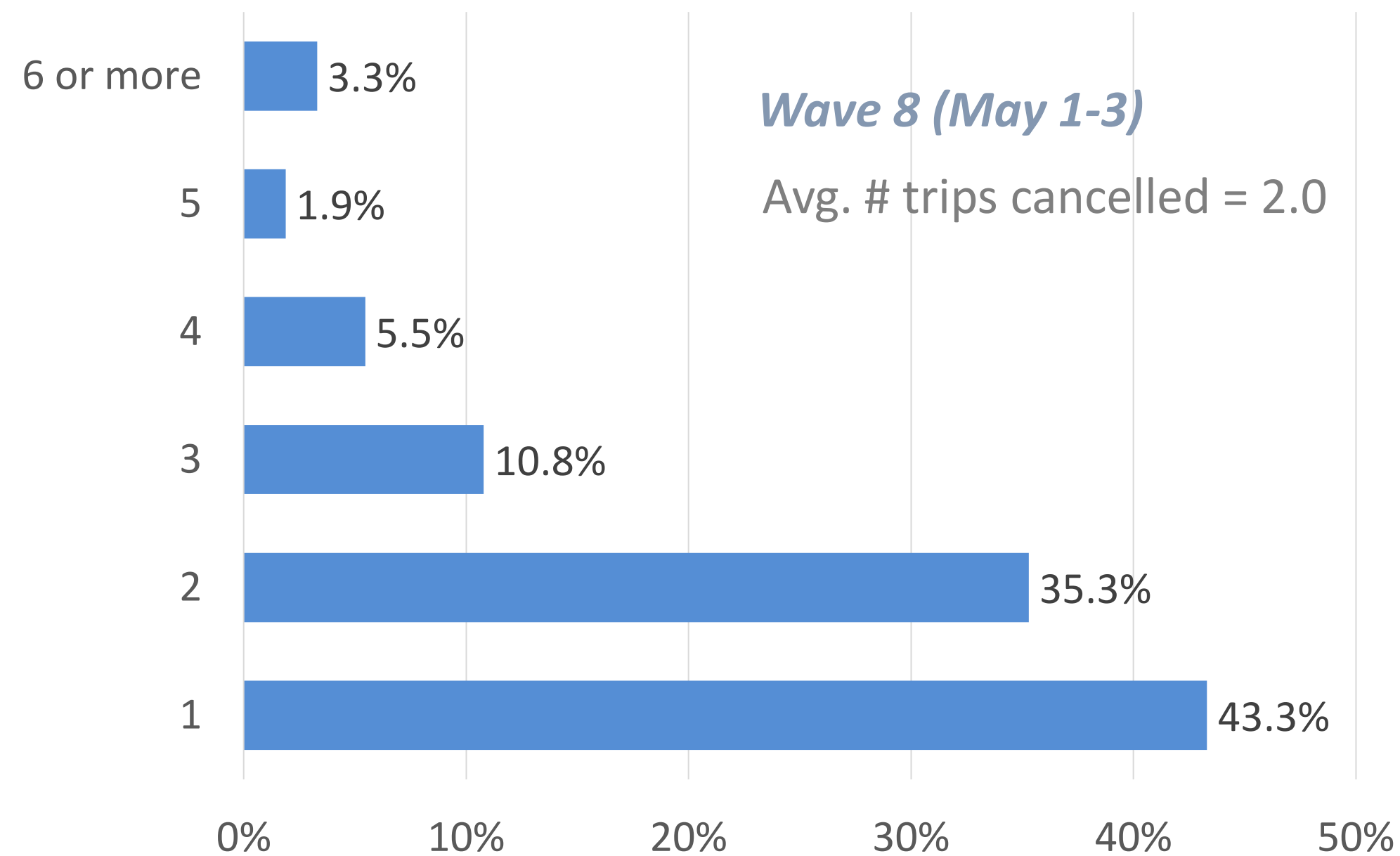
(Base: Wave 8. Respondents whose travel was impacted by the coronavirus, 926 completed surveys. Data collected May 1-3, 2020)



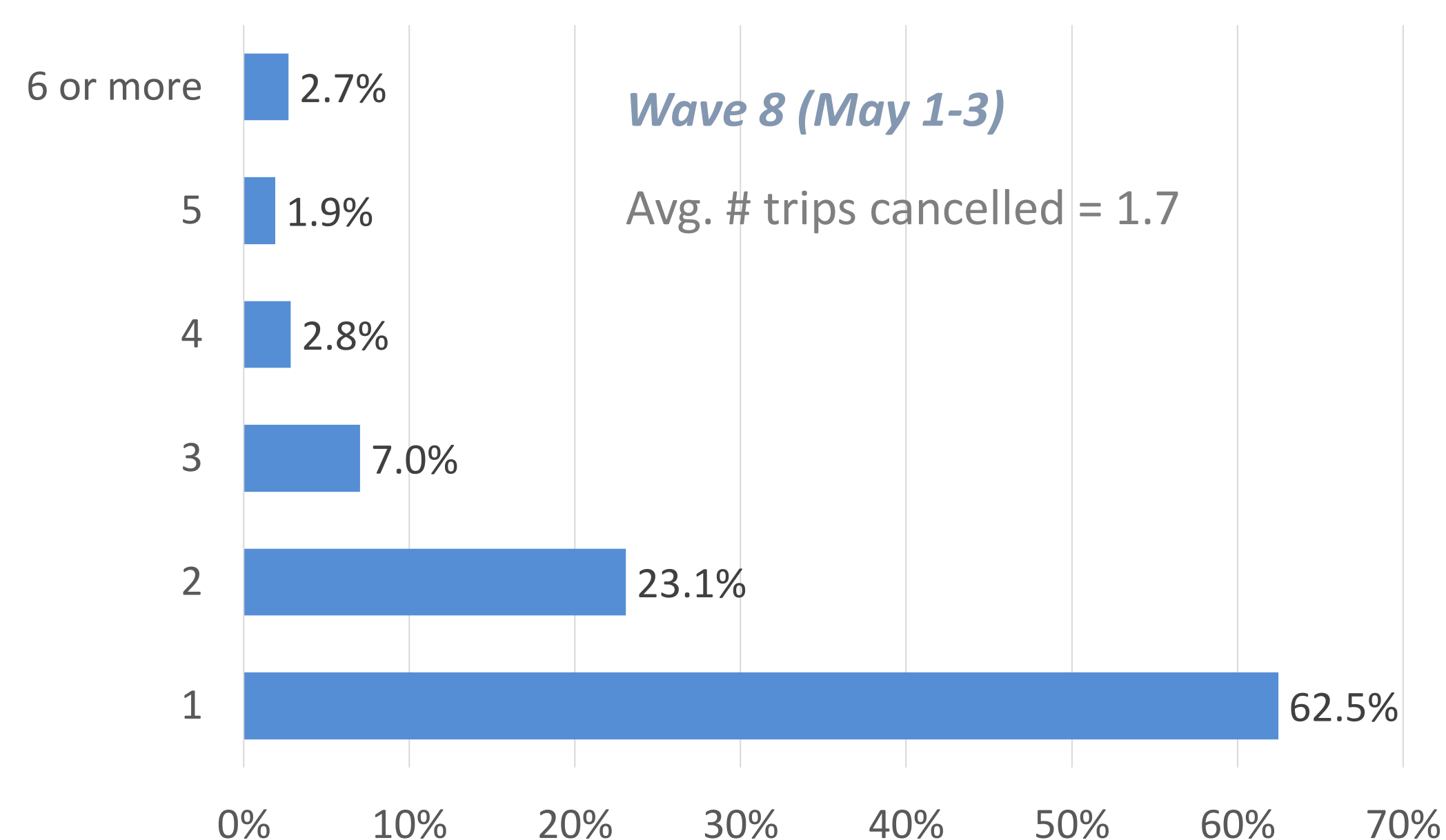
Trips Cancelled/Postponed

The average American traveler who has cancelled a trip says they have done so for 2.0 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?



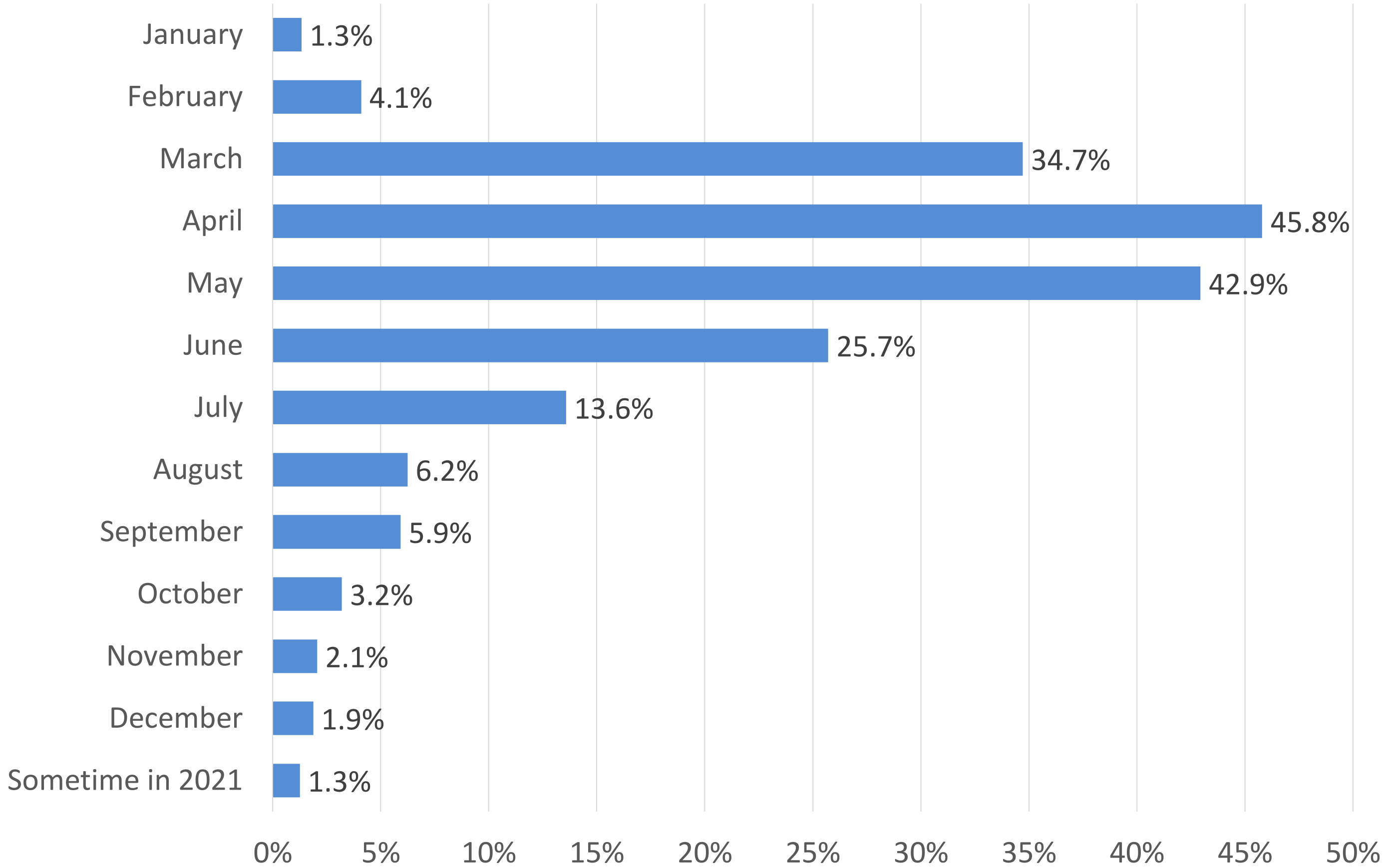
(Base: Wave 8, Respondents cancelling/postponing a trip, 642/508 completed surveys. Data collected May 1-3, 2020)

Month of Trip Cancellation

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

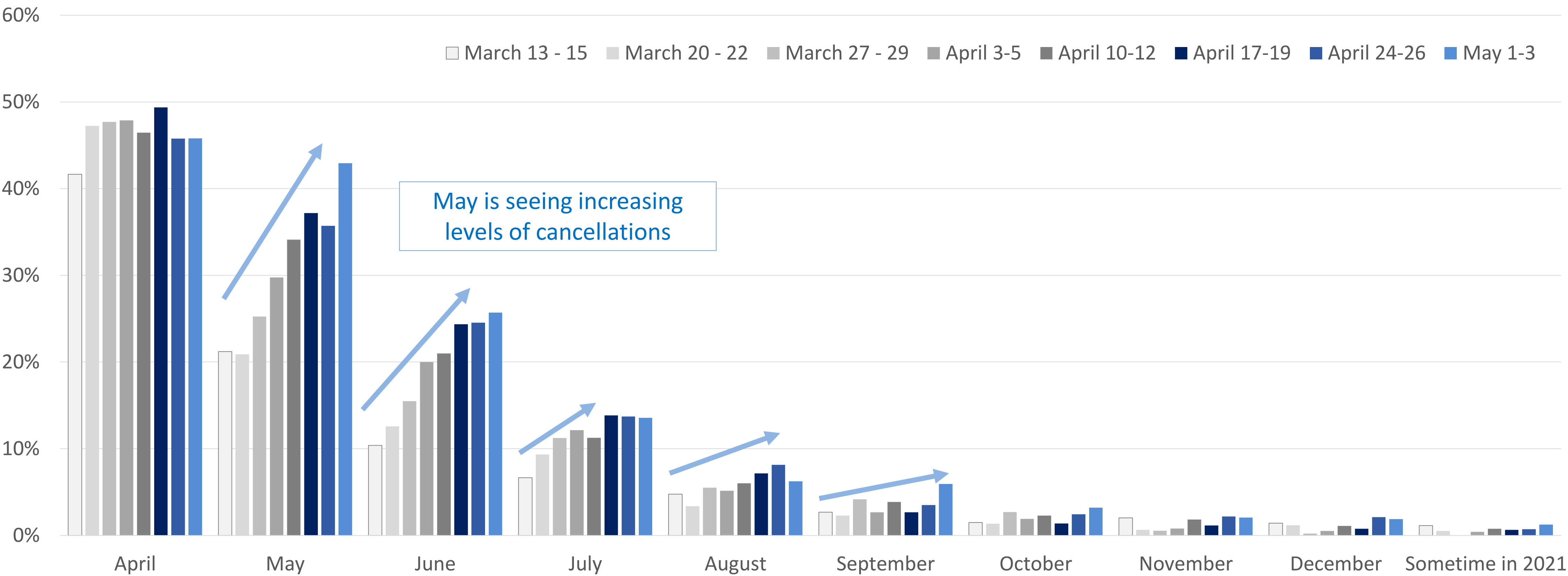
(Base: Wave 8. Cancelling trips, 640 completed surveys. Data collected May 1-3, 2020)

Cancellations of May trips has increased significantly this week.



Month of Trip Cancellation

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

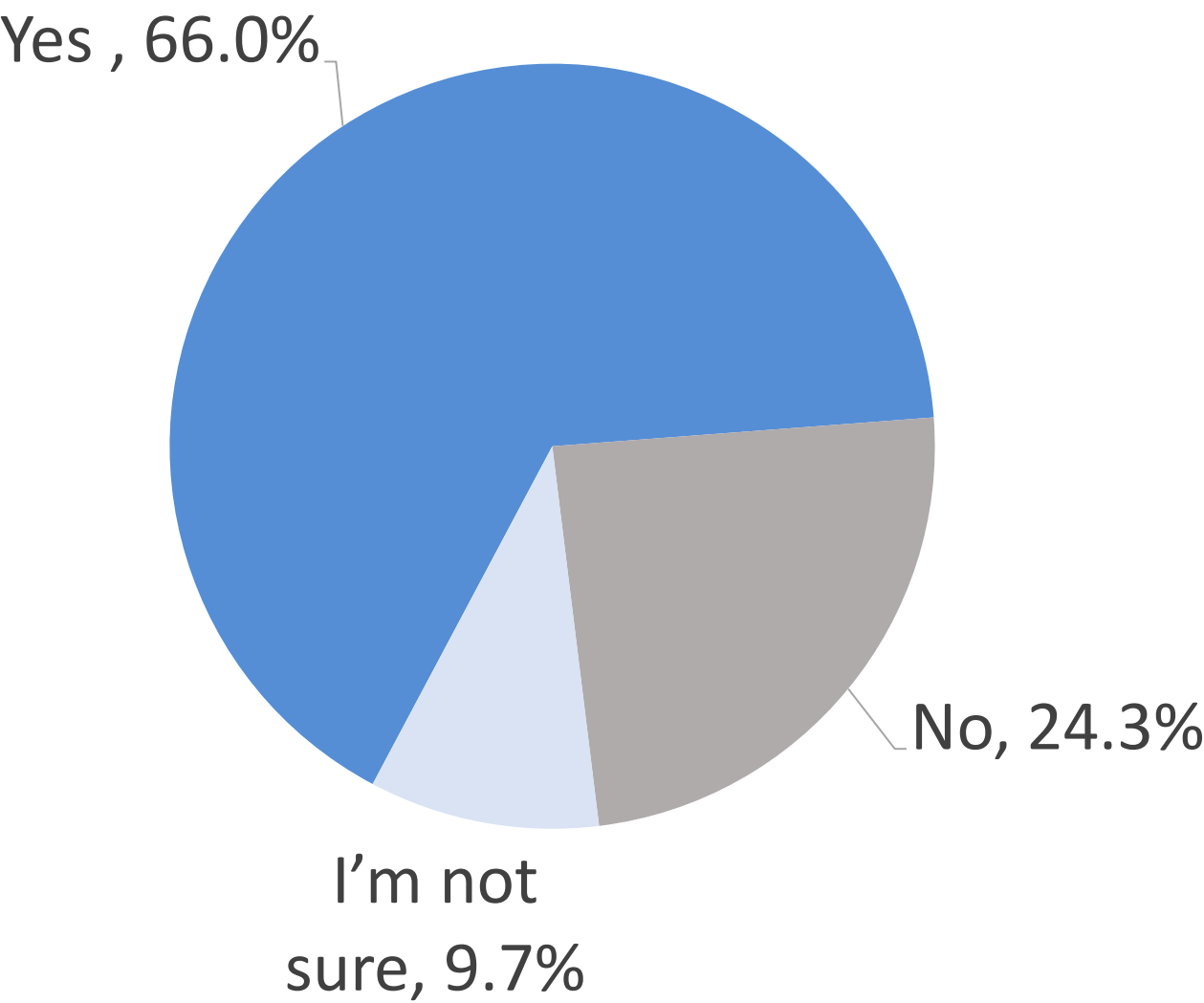


(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582 and 640 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020.
Note: Data purposefully excluded from this chart for readability.)

Did Traveler Get Full Refunds?

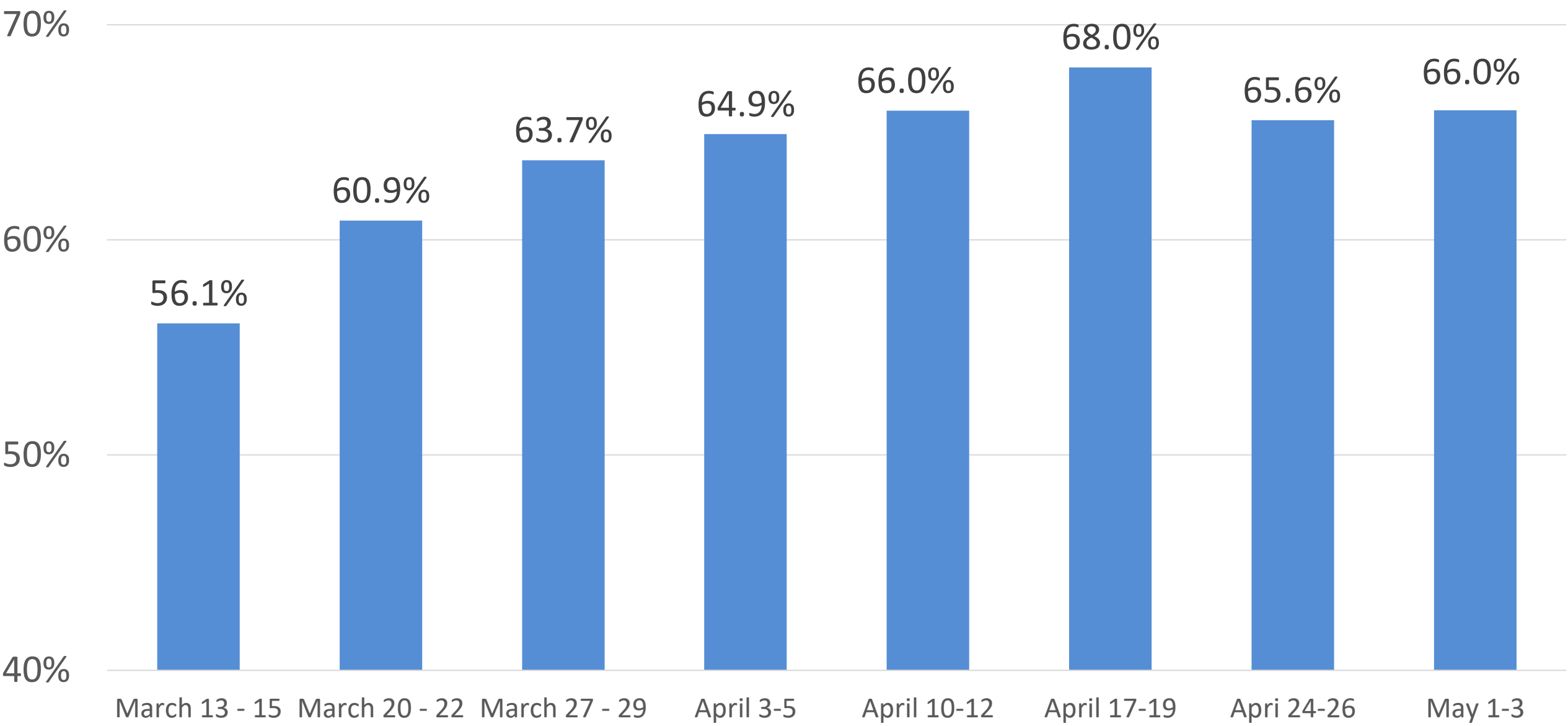
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 8 (May 1-3)



(Base: Wave 8. Respondents cancelling a trip, 640 completed surveys. Data collected May 1-3, 2020)

The proportion of travelers being fully refunded for cancelled trips stayed constant this week. 66.0 percent report receiving full refunds, similar to 65.6 percent last week.

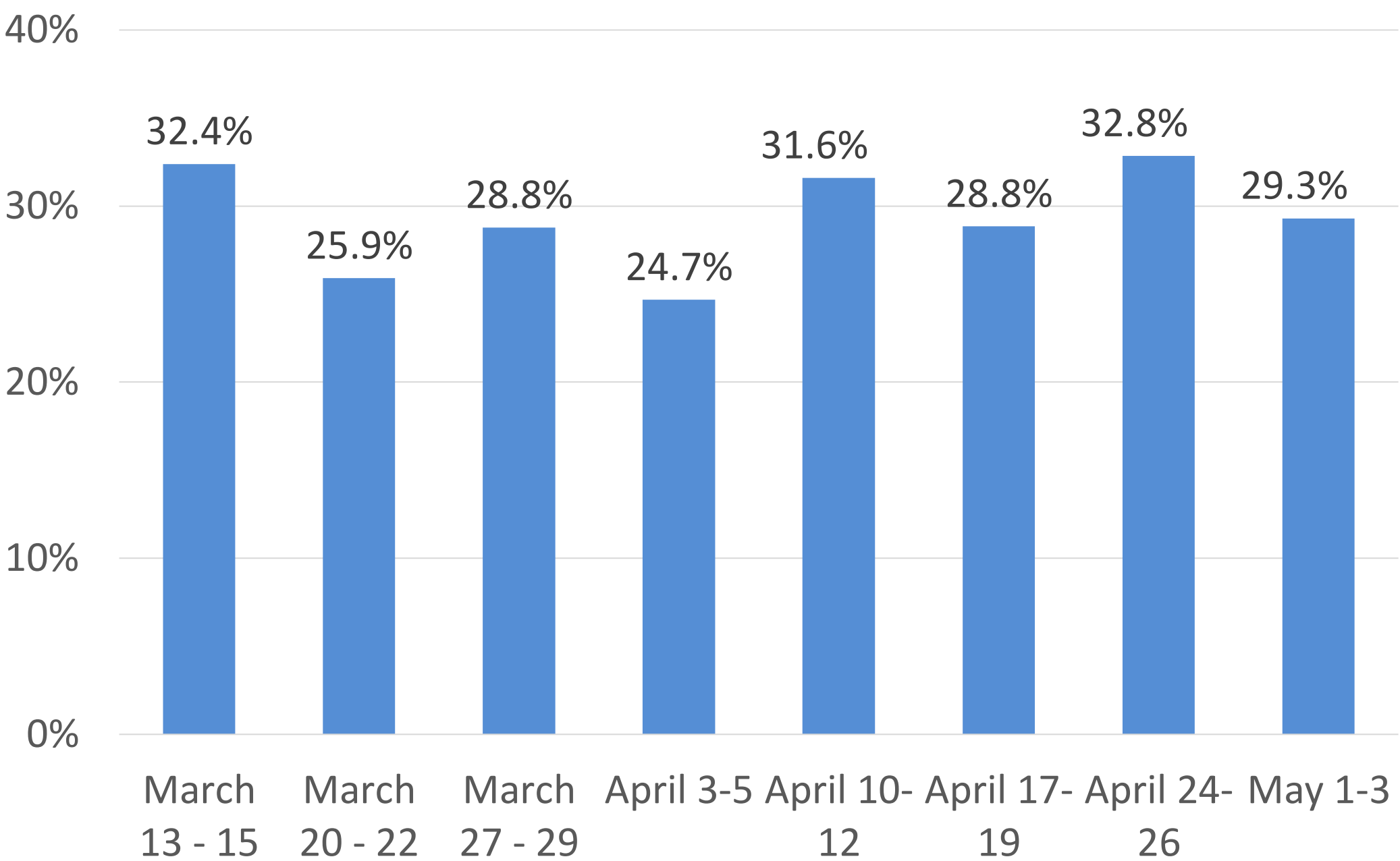
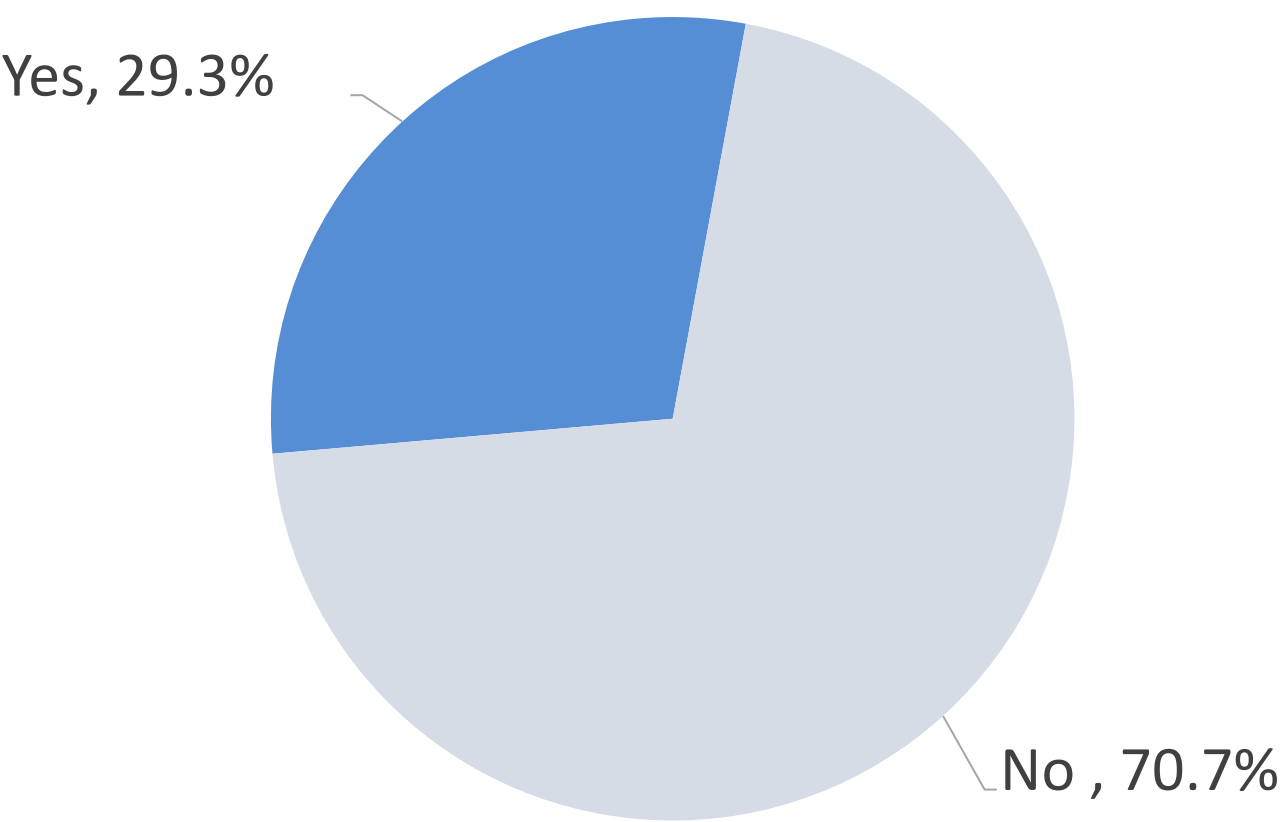


Were Postponed Trips Rescheduled?

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.

Wave 8 (May 1-3)

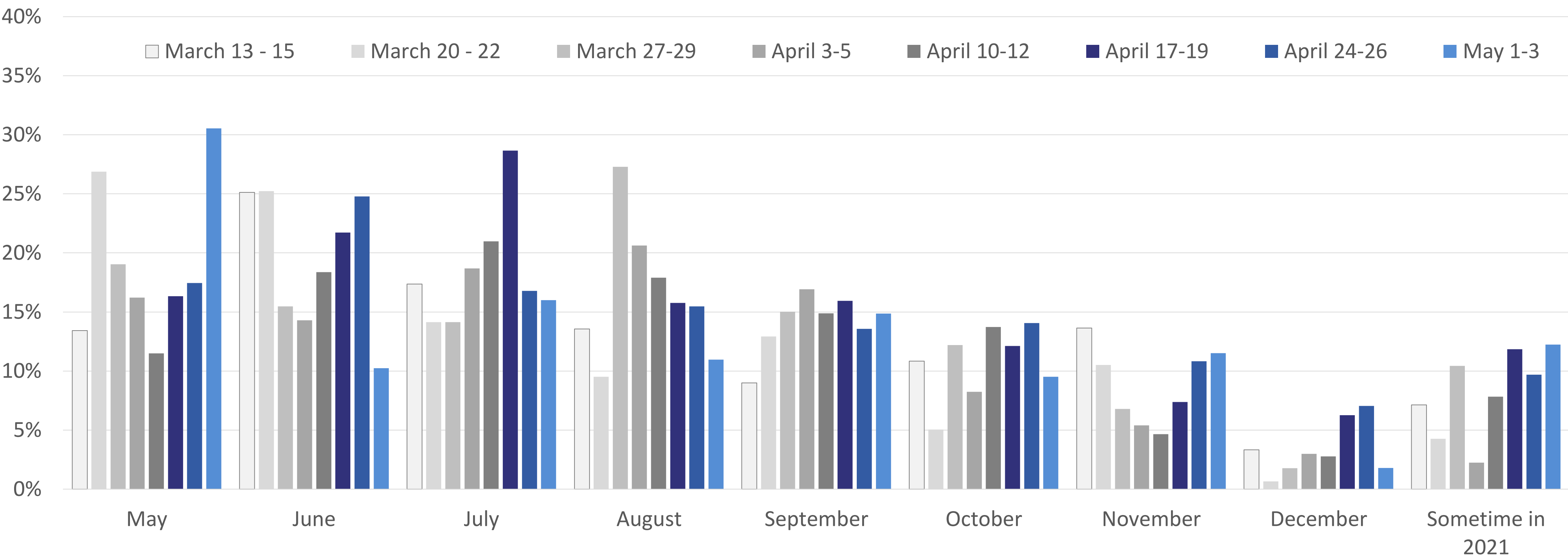


(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463 and 506 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Month Postponed Trips Rescheduled

In the most recent survey wave, postponements appear to be increasing for the months of May and June.

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

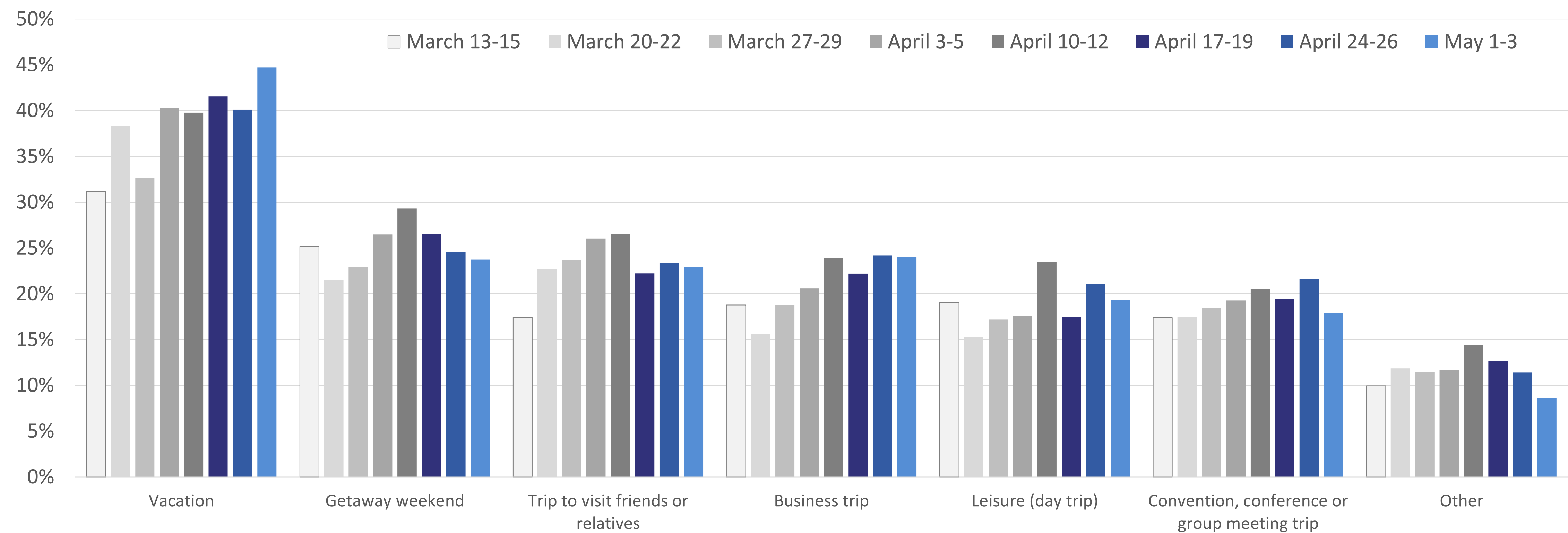


(Base: Postponing trips rescheduled, 99, 86, 120, 107, 132, 123, 145 and 144 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Types of Trips Cancelled

All types of travel are being cancelled, with vacations being the most common type.

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

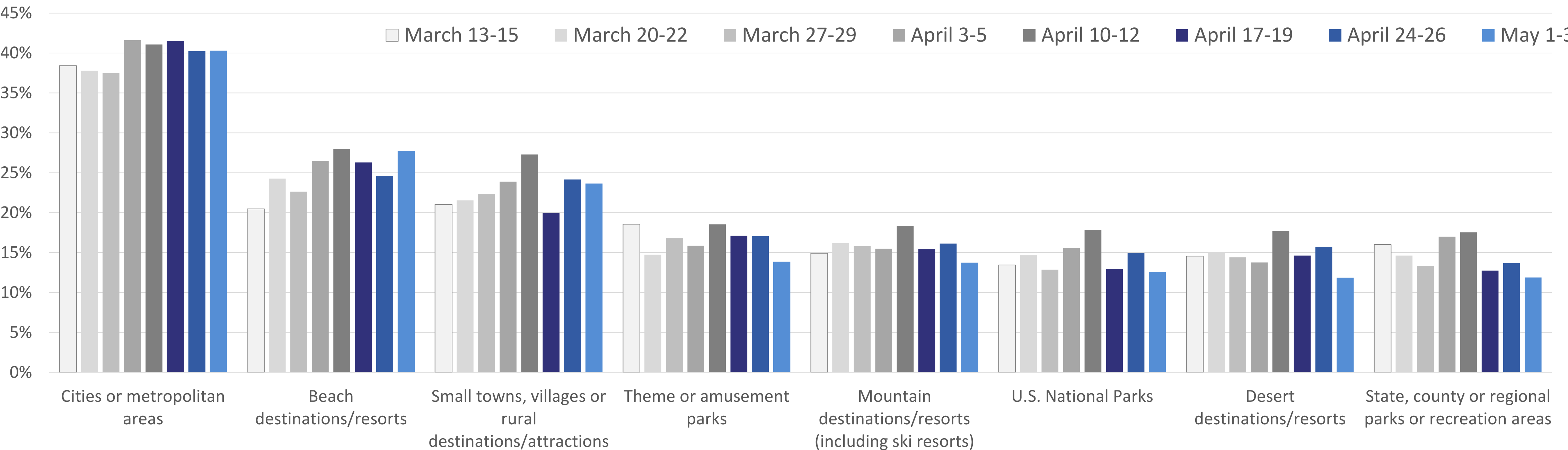


(Base: Cancelling trips, 292, 477, 506, 580, 624, 643, 582 and 642 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Types of Destinations Cancelled

Again, in this wave there were no major changes in the types of destinations being cancelled. Cities and metropolitan areas continue to be the most cancelled destination type.

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

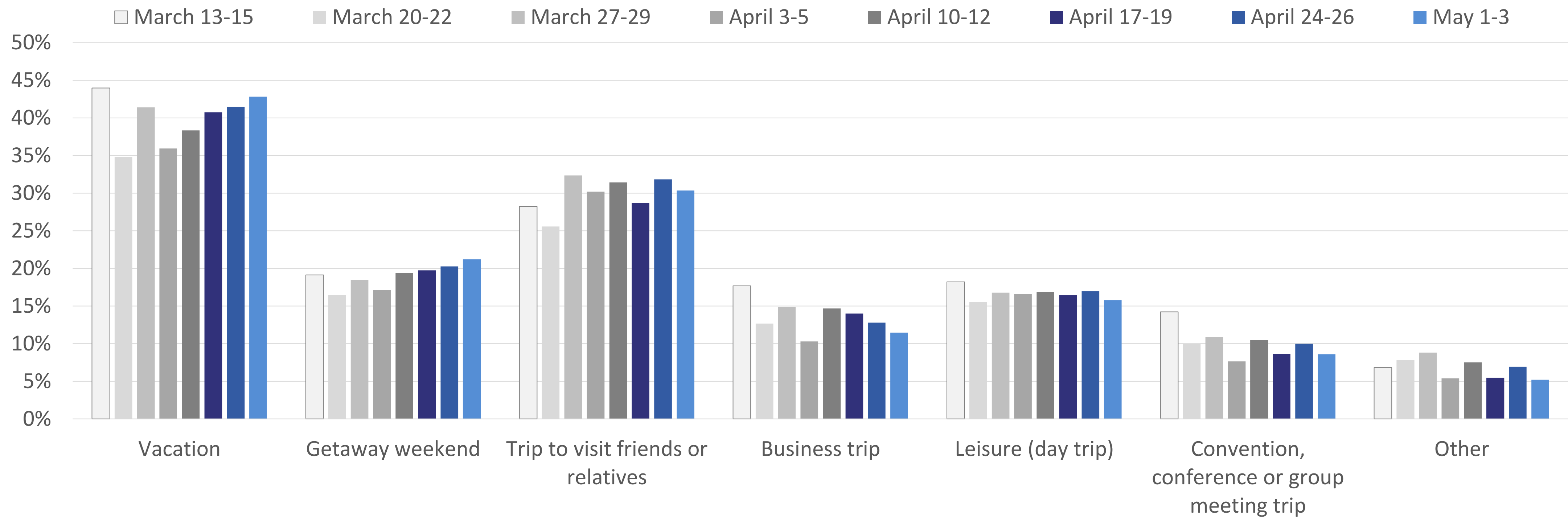


(Base: Cancelling trips, 292, 477, 506, 580, 624, 643, 582 and 642 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Types of Trips Postponed

Vacations are still the most postponed trip type, with visiting friends and relatives coming in second.

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

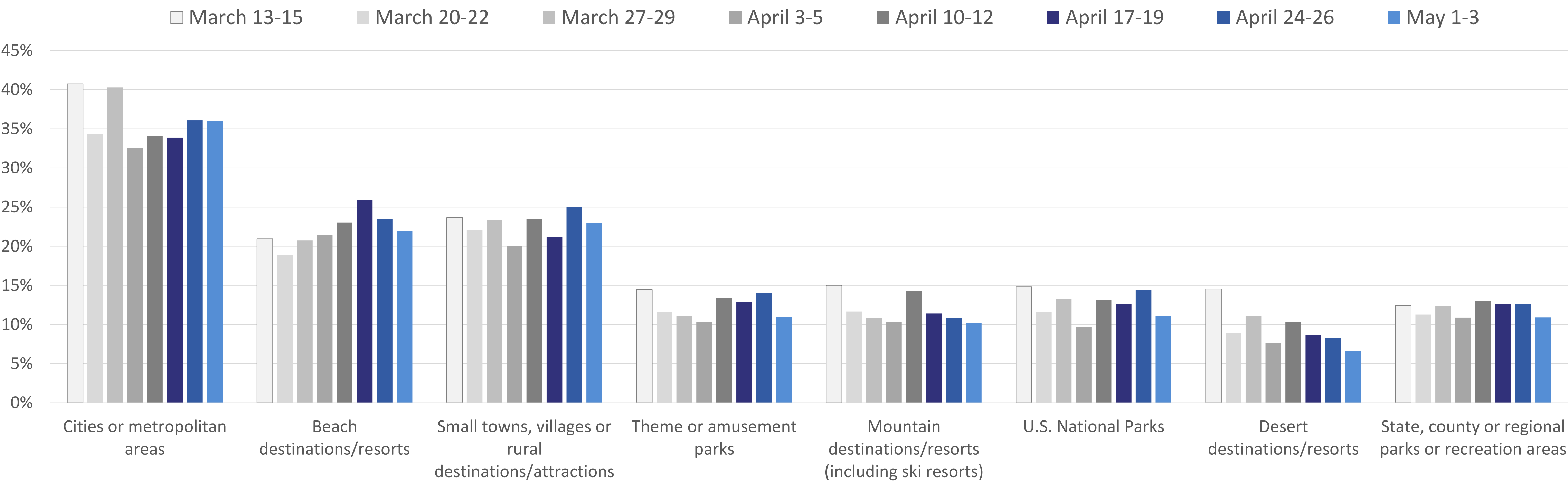


(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463 and 508 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

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)

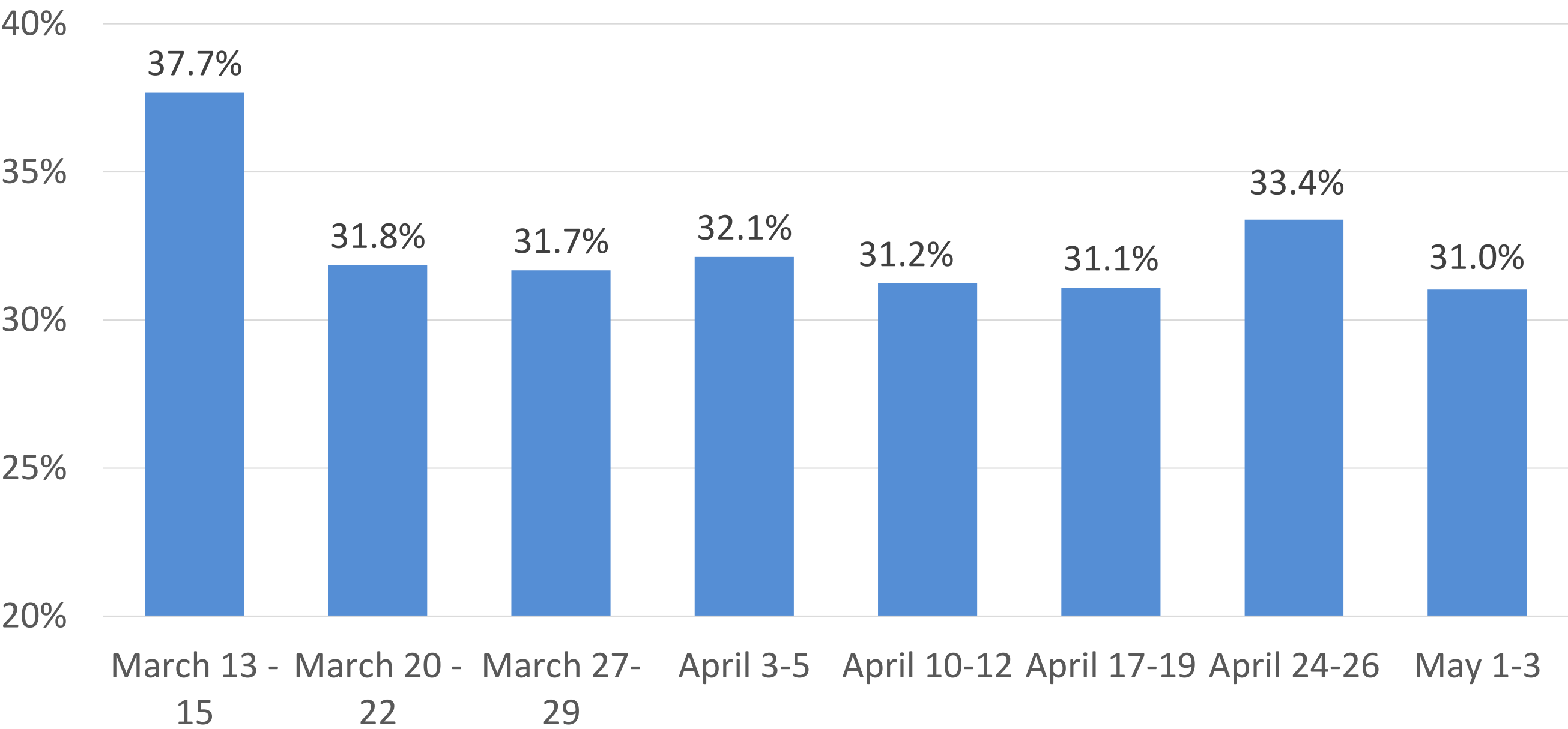
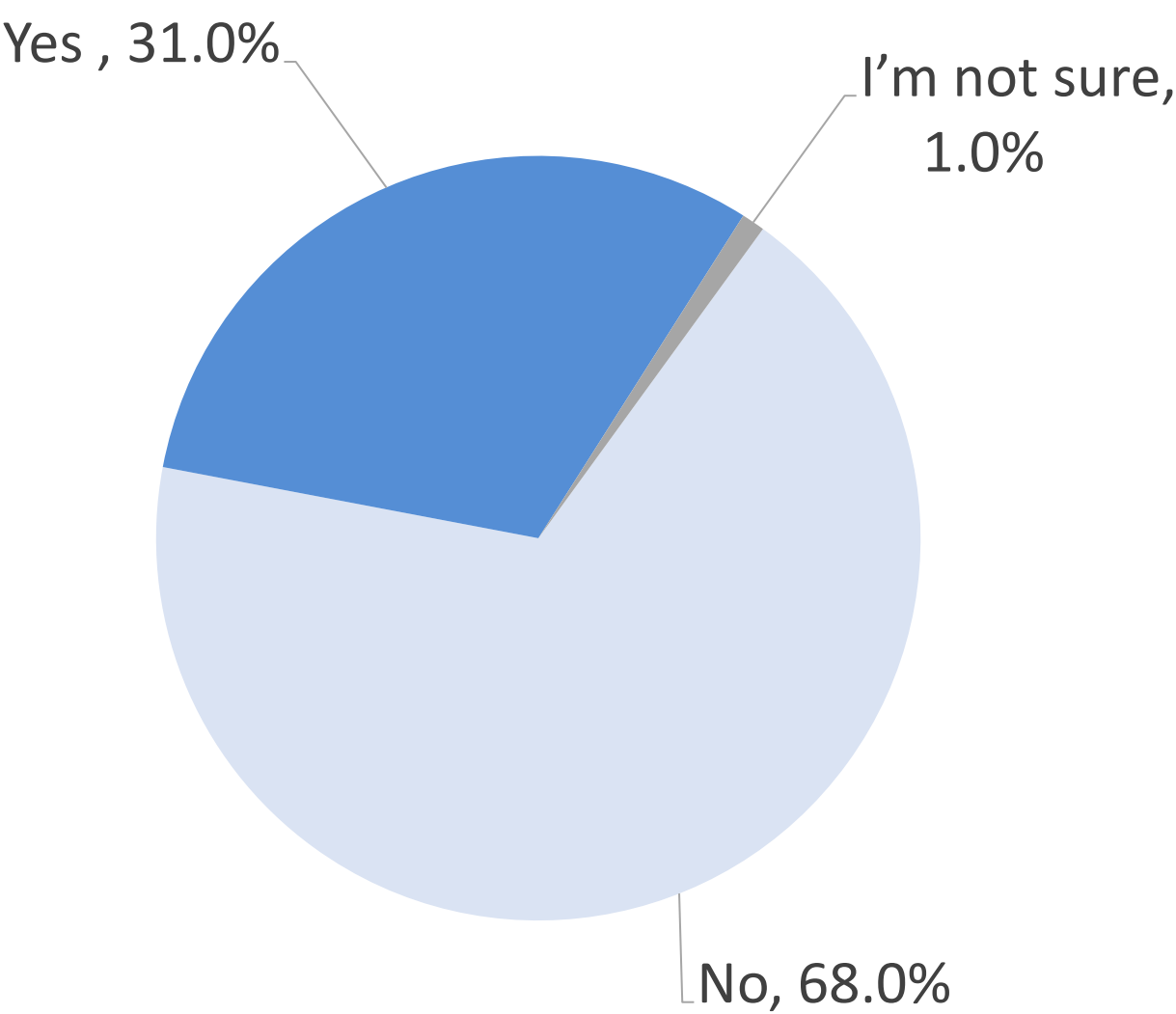


(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463 and 508 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

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)?

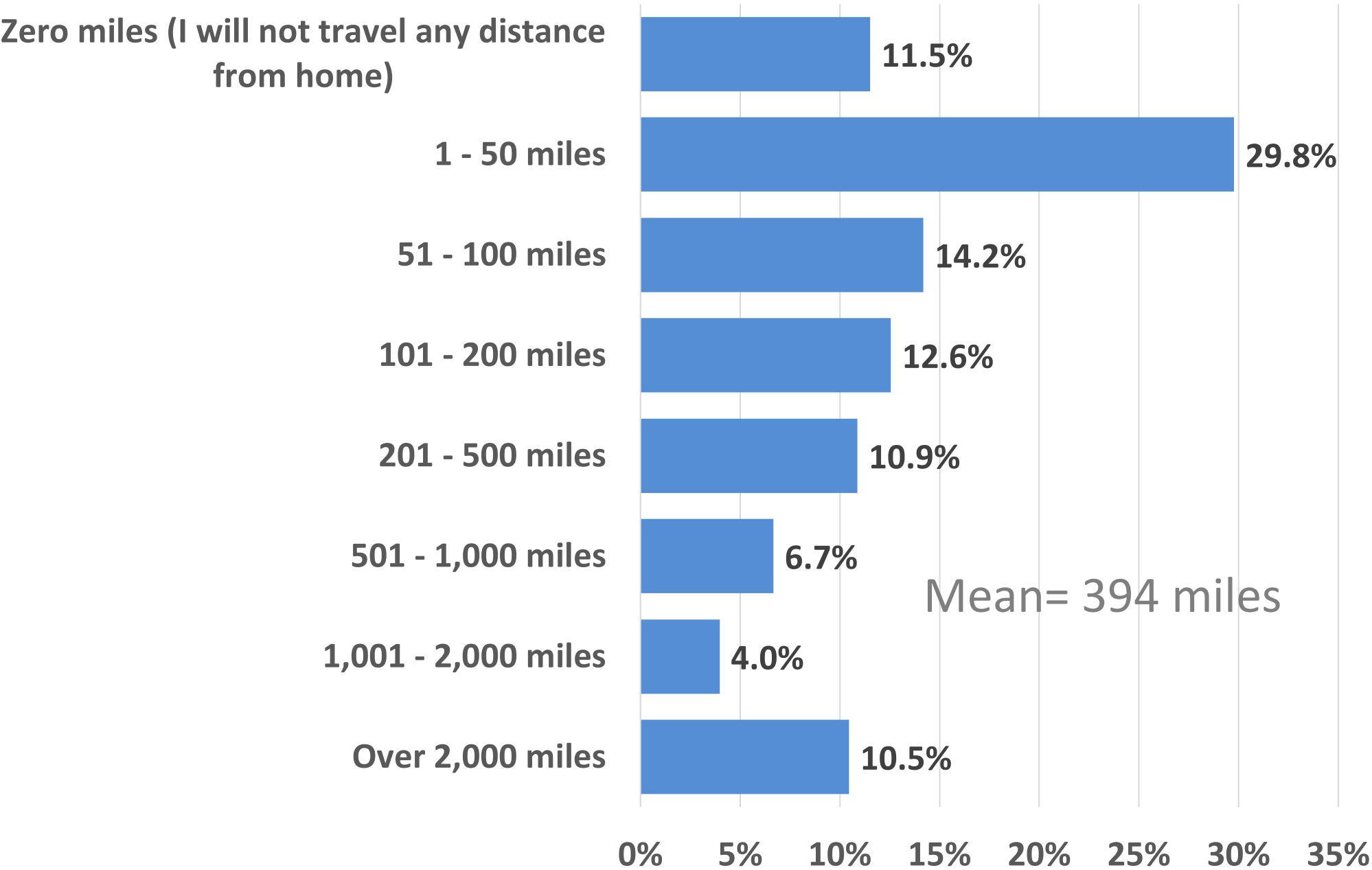
One-in-three (31.0%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure fell slightly this week.



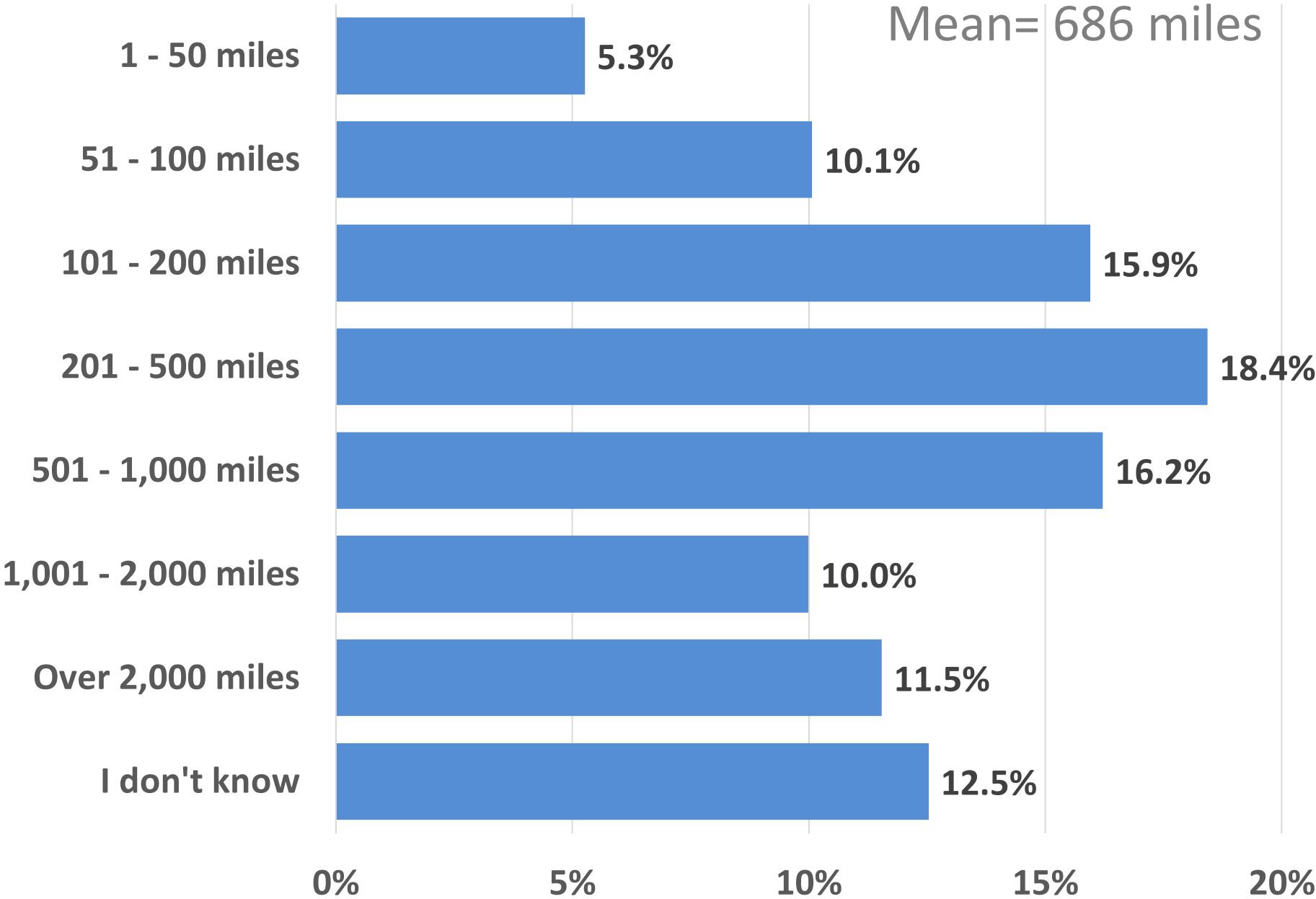
(Base: Wave 8. Respondents cancelling or postponing a trip, 926 completed surveys. Data collected May 1-3, 2020)

Travel Distance Thresholds

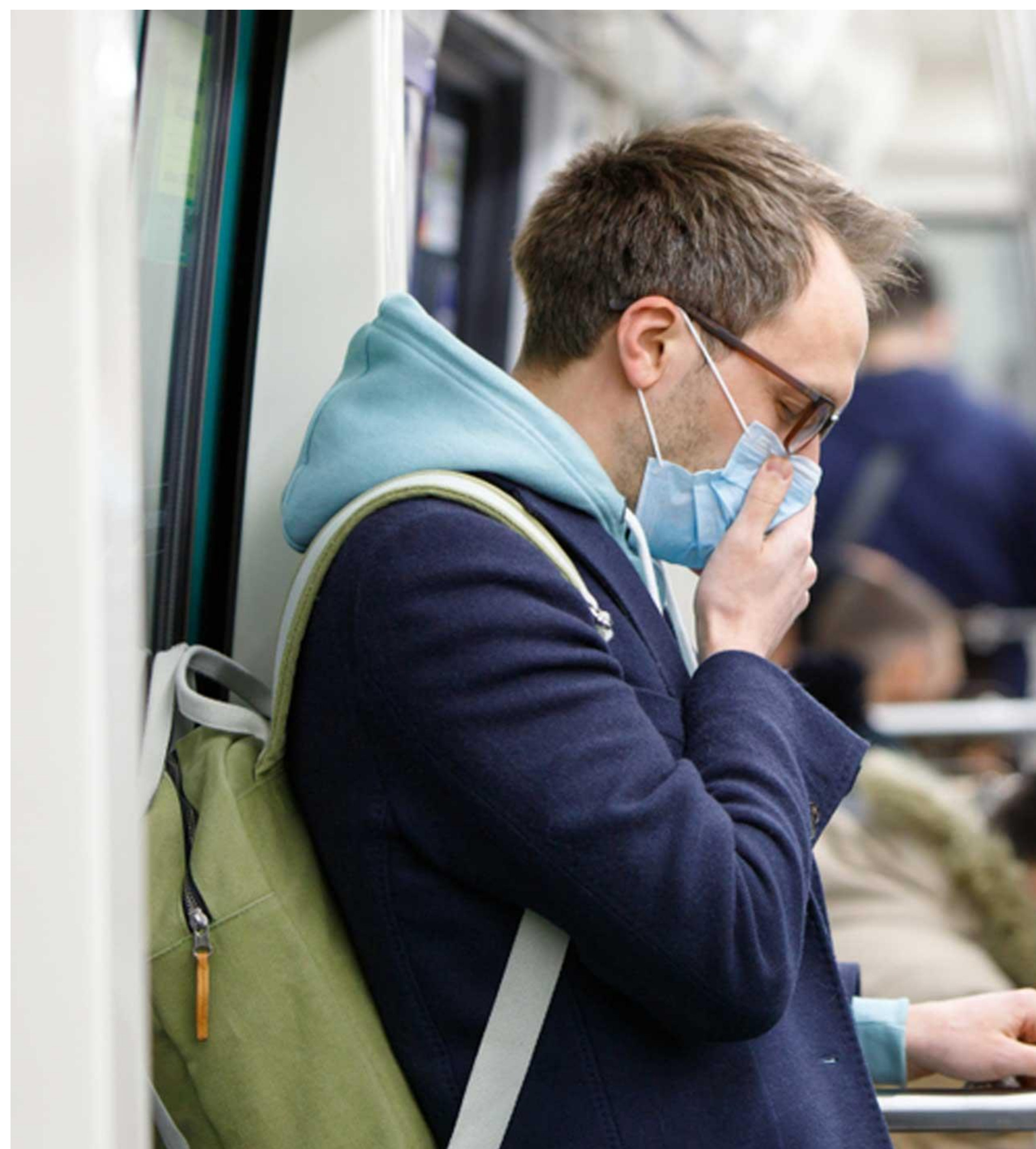
Question: In the current environment, how far away from home (in miles) would you be willing to travel for any reason? Please select the one which represents the **MAXIMUM DISTANCE** you would travel from home.



Question: On your next leisure trip, how far away from home will be likely you travel?



(Base: Wave 8, All respondents 1,204 completed surveys. Data collected May 1-3, 2020)



Section IV: Opinions on Travel & the Coronavirus

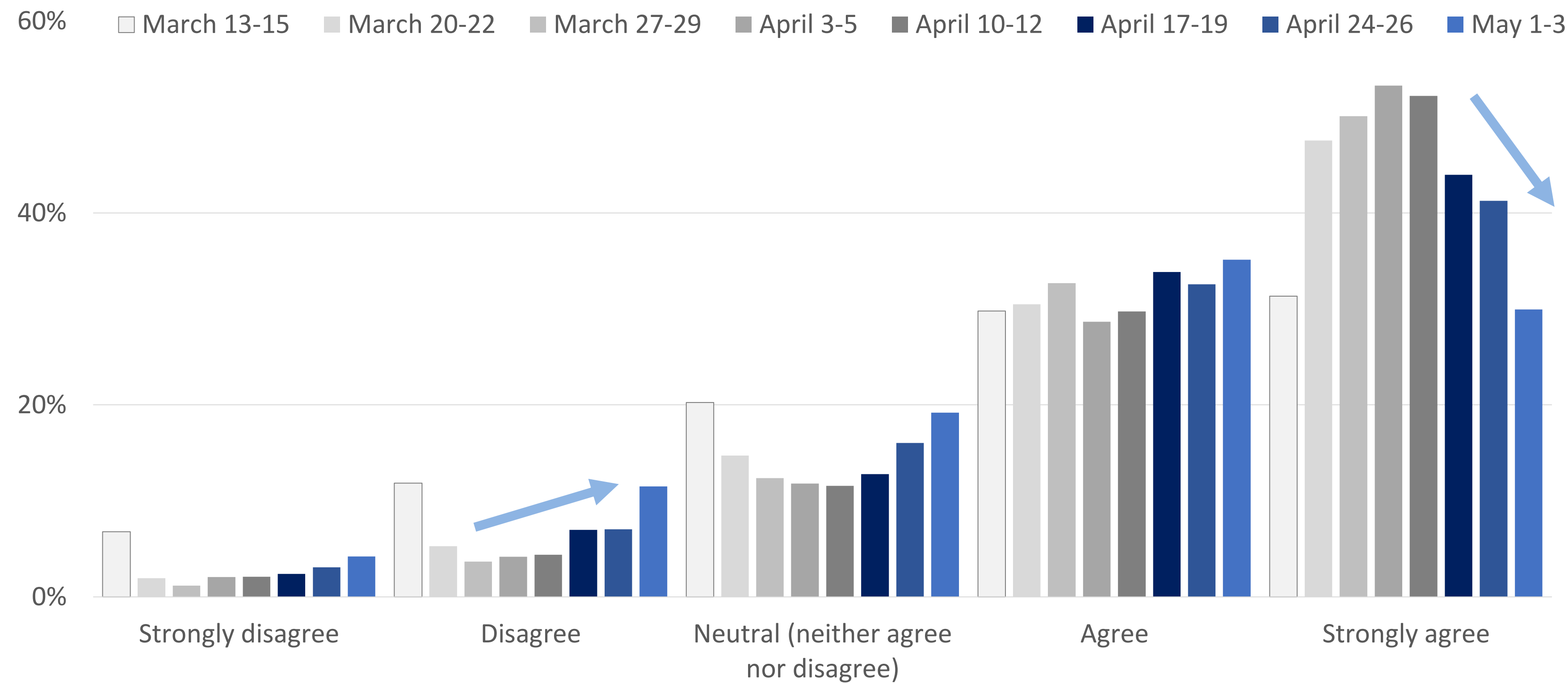
Avoiding Travel Until the Crisis Blows Over

This week, just under two-thirds (65.1%) of American travelers say they are done traveling until the coronavirus situation blows over.
Strong agreement with this statement has declined significantly in the last three weeks (41.3% last week vs. 29.9% this week).

How much do you agree with the following statement?

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



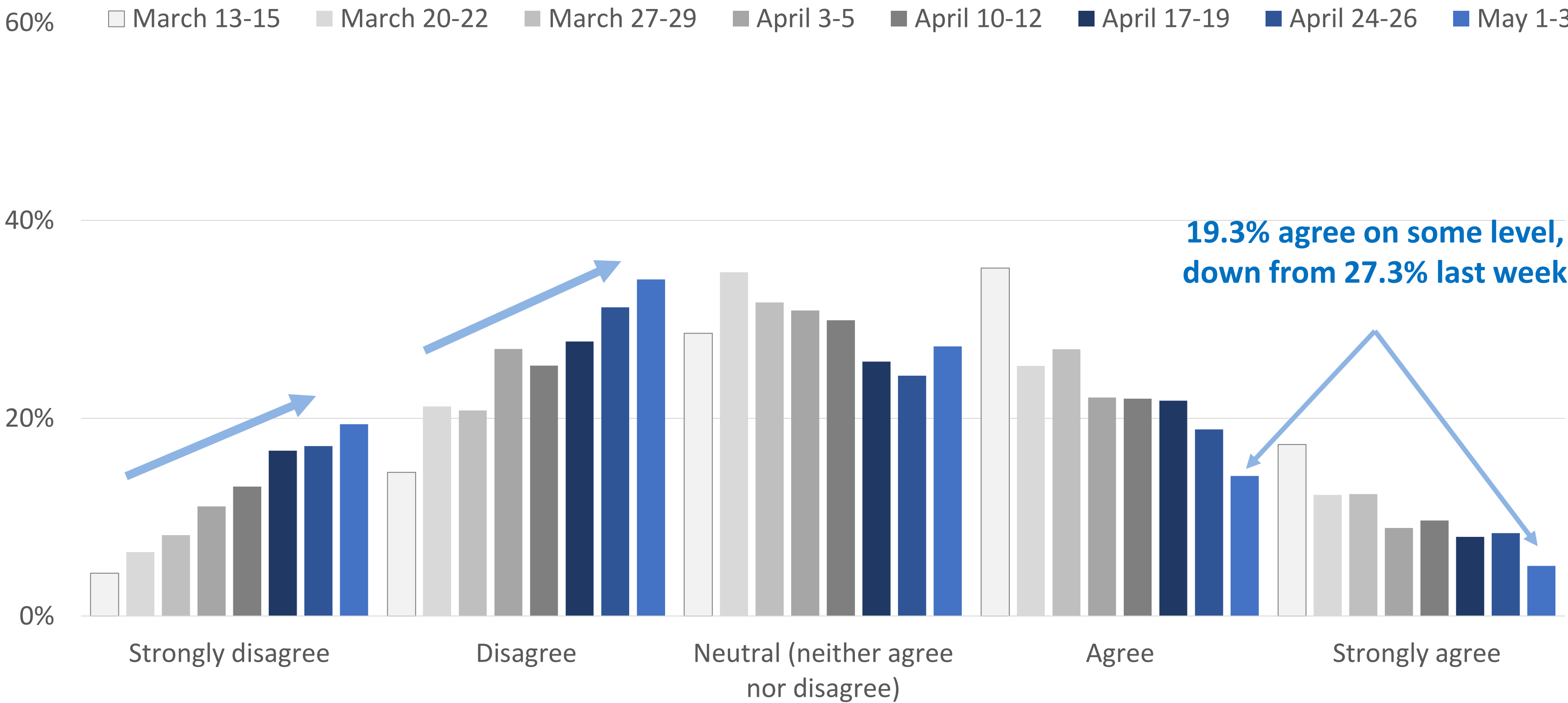
Expectations for Summer Travel Season

Agreement that the coronavirus situation will be resolved by the summer travel season continues to decline. In total, 19.3 percent of Americans agree on some level that the coronavirus situation will be resolved before summer, while over half (53.4%) disagree.

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, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



Expectations for Fall Travel Season

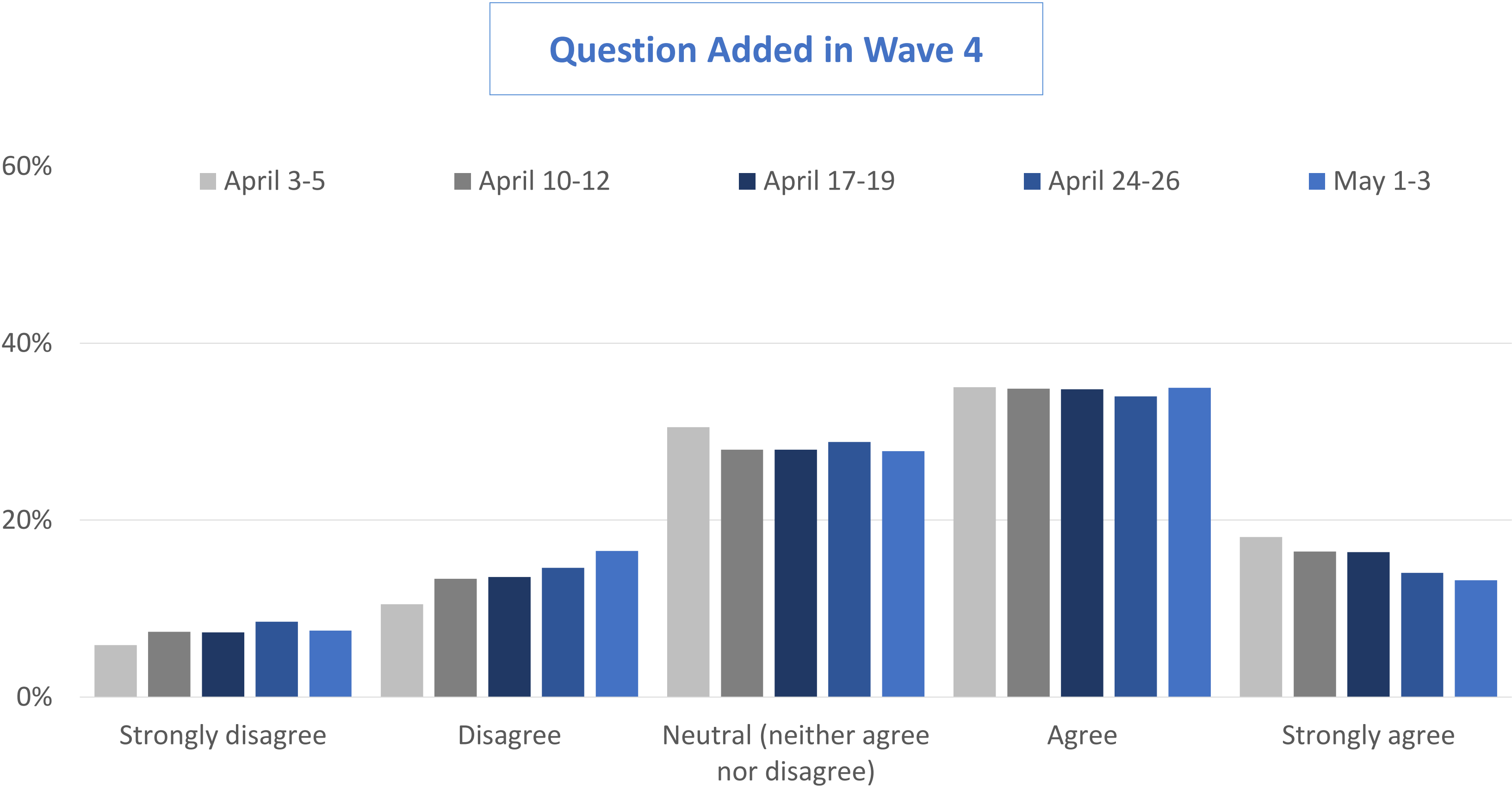
Identical to last week, just under half of American travelers (48.2%) expect to be back traveling this Fall.

Question Added in Wave 4

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, 1,263, 1238, 1,208 and 1,204 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, , May 1-3, 2020)



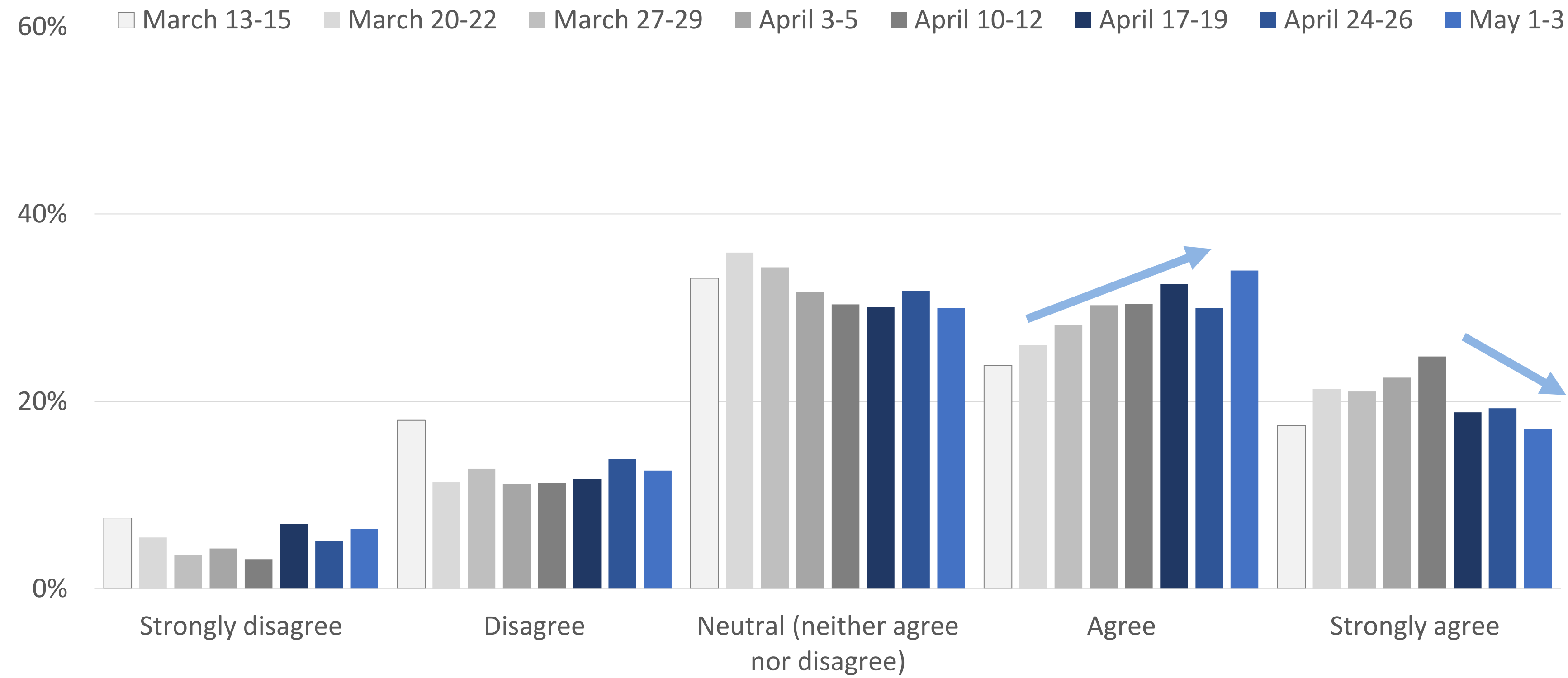
Staycations as a Replacement for Vacations

Half of American travelers still agree that staycations may end up replacing vacations this summer (51.0% vs. 49.3% last week).

How much do you agree with the following statement?

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



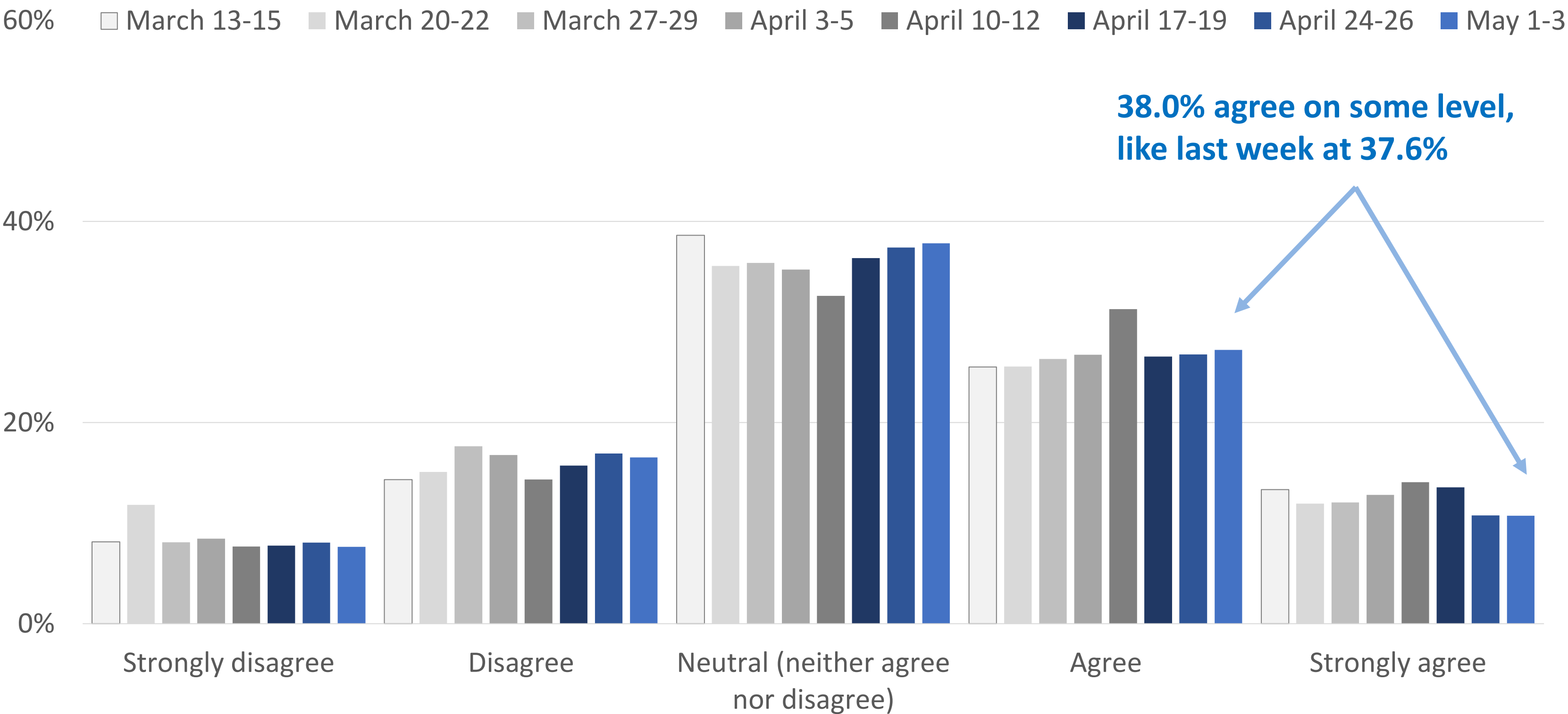
Replacing Air Travel With Road Trips

Unchanged from last week, 38.0 percent of Americans say car travel may displace some of their air travel this year.

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



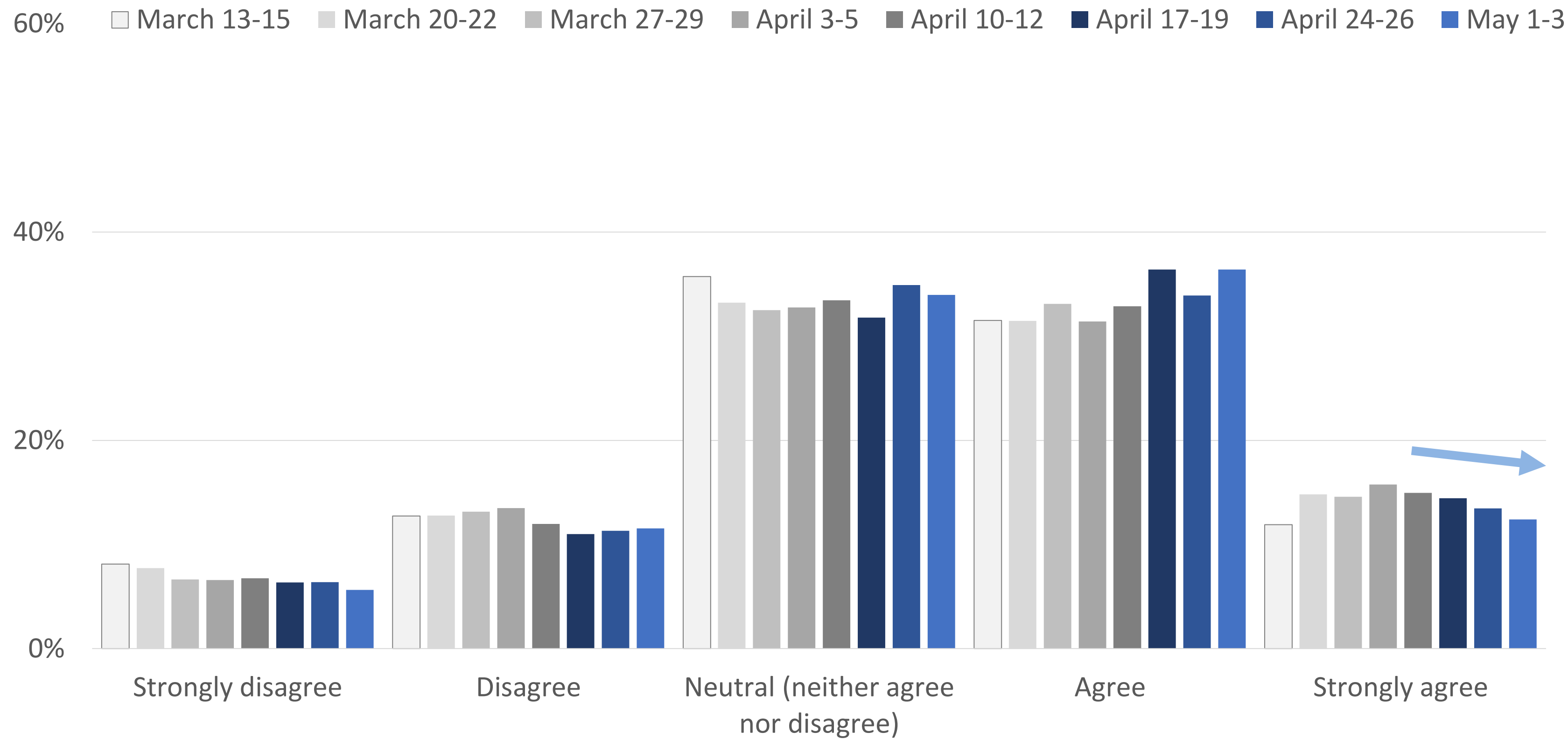
Replacing Long-Haul Travel with Regional Trips

Just under half (48.8%) still say they'll probably take more regional trips while avoiding long-haul trips (similar to last week at 47.4%).

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



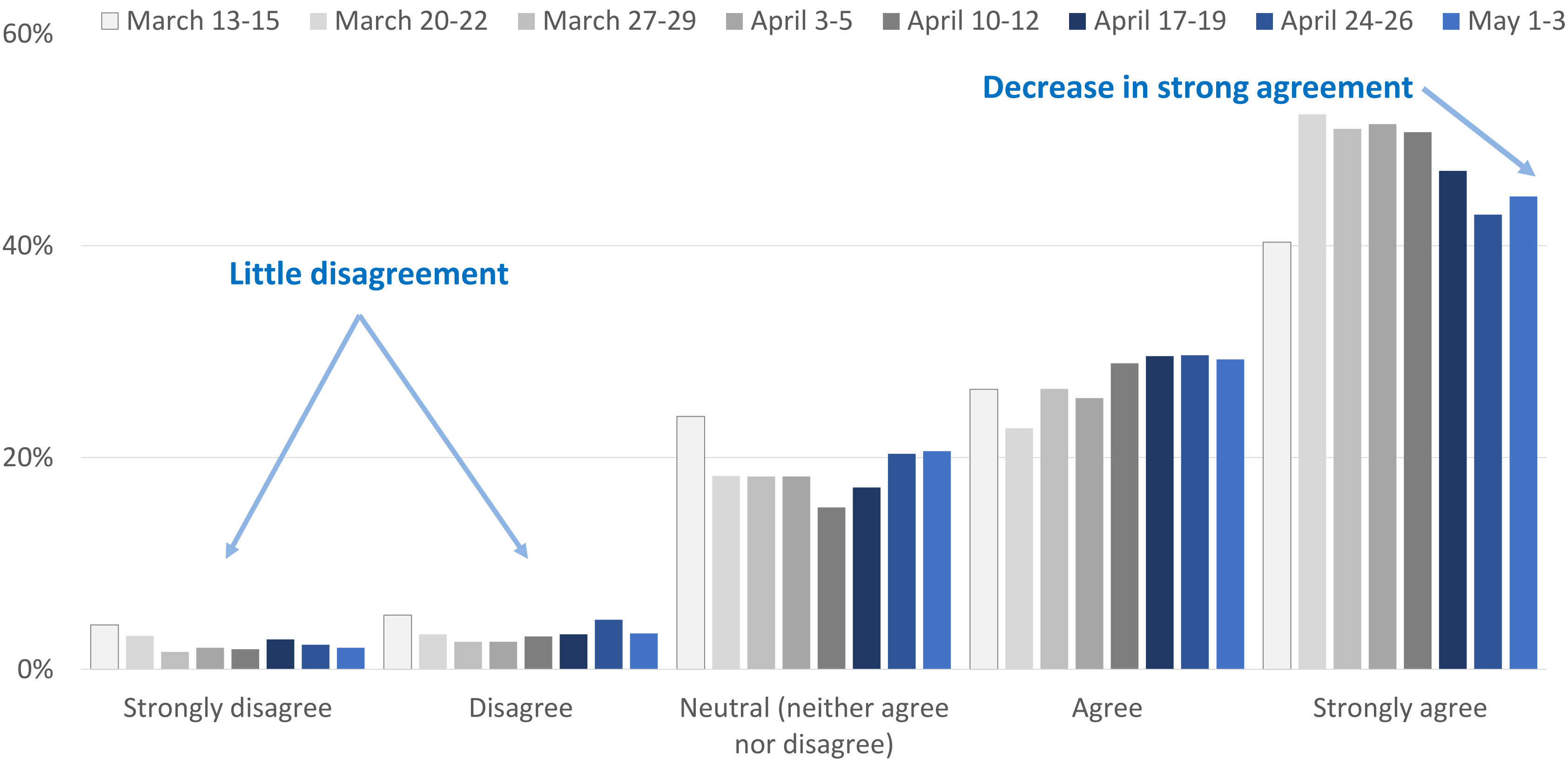
Avoiding Conventions & Conferences

Likelihood of attending meetings in the current environment remains low. Under three-quarters of travelers (73.9%) say they will be unlikely to attend these events until the coronavirus situation is over (similar to last week at 72.6%).

How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



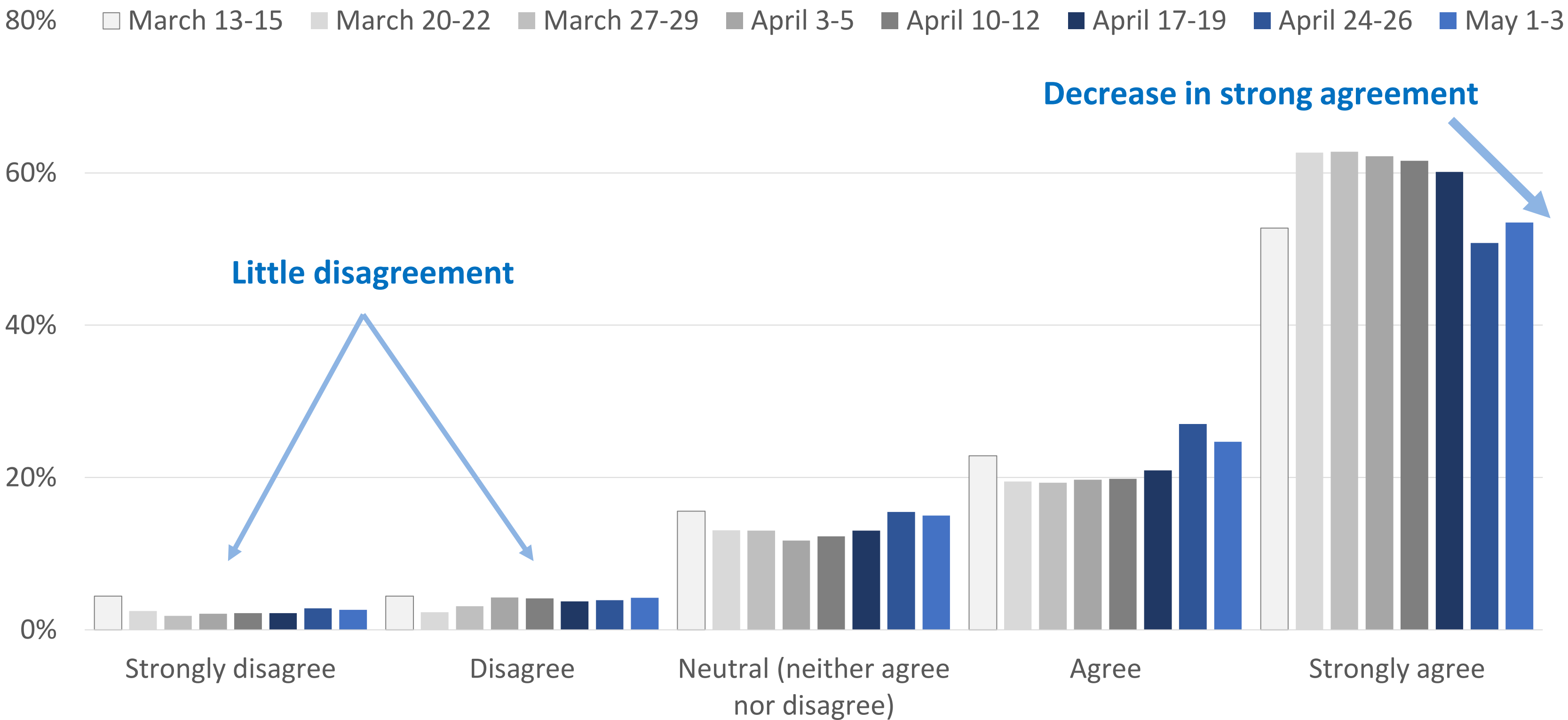
Avoiding International Travel

A majority (78.2%) still say they will be unlikely to travel abroad until the coronavirus situation is resolved—unchanged from last week at 77.8 percent.

How much do you agree with the following statement?

Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



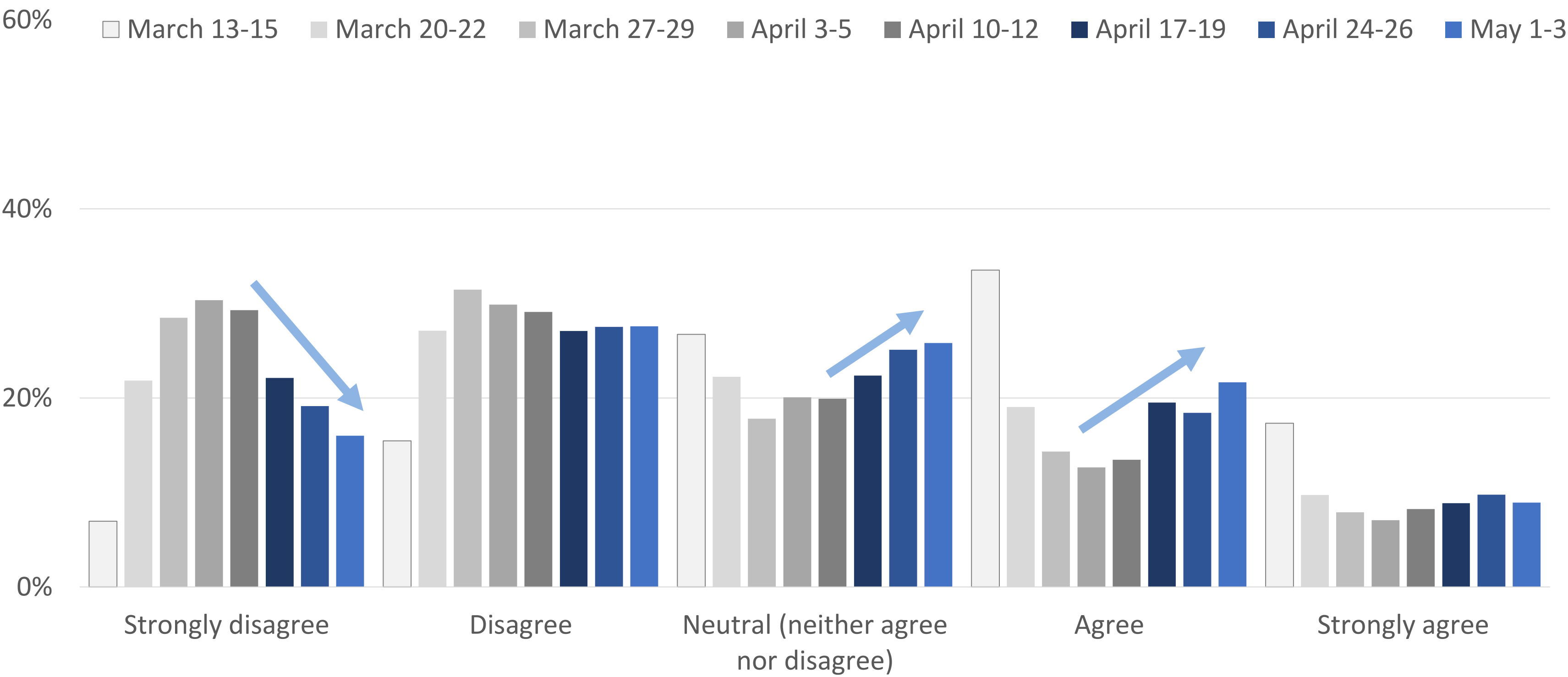
Comfort Enjoying Home Community

American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves. While only 30.6 percent say they are comfortable going out in their community (up slightly from 28.2% last week), strong disagreement with this sentiment continues to decline.

How much do you agree with the following statement?

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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



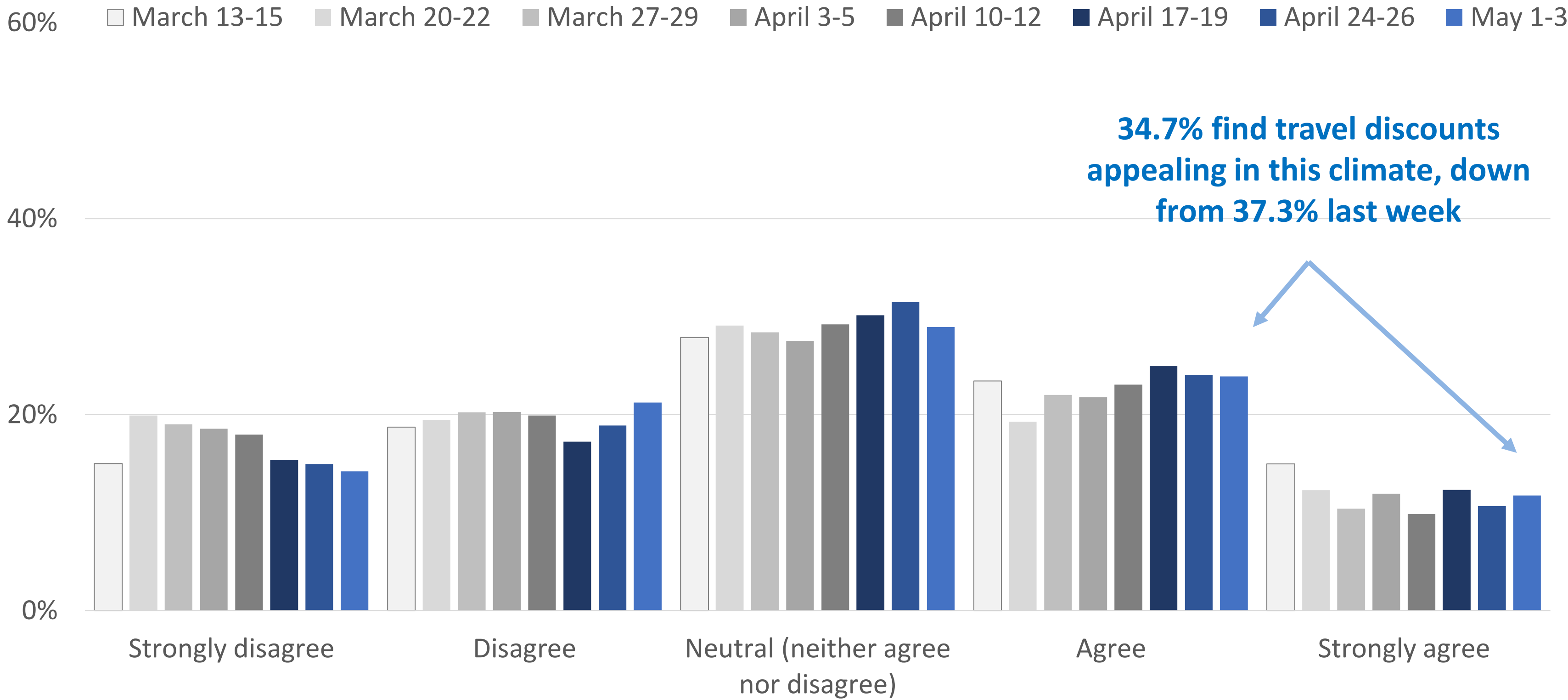
Discounts and Price Cuts

Price cuts resonate with over a third of American travelers. When asked if price cutting made traveling in the next three months more interesting, 35.6 percent agree, up slightly from last week (34.7%).

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, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)



Supporting Local Businesses

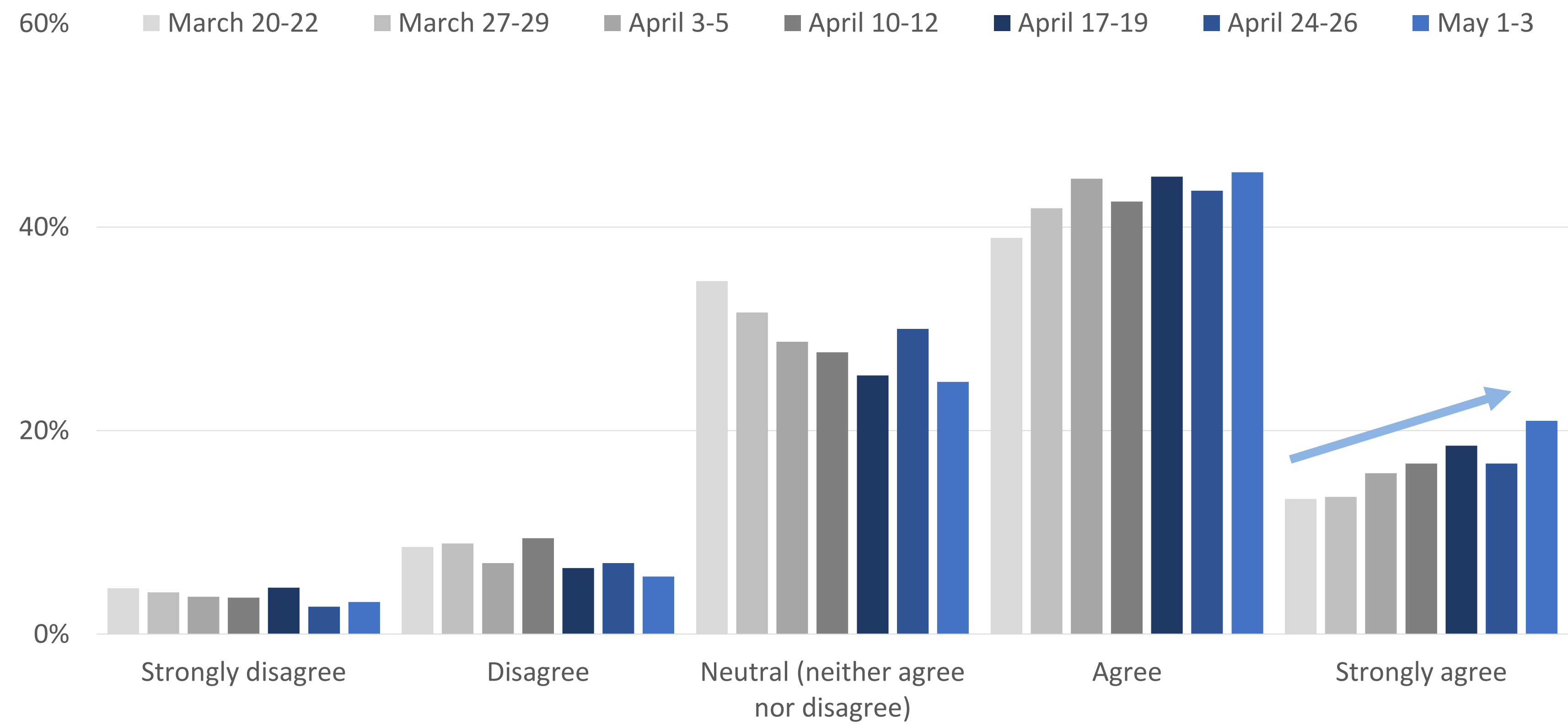
Now, 66.4 percent of American travelers say they have been taking action to try to support local businesses where they live (up from 60.3% last week).

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, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 20-22, 27-29 April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

Question Added in Wave 2



Travelers in Community are Unwanted

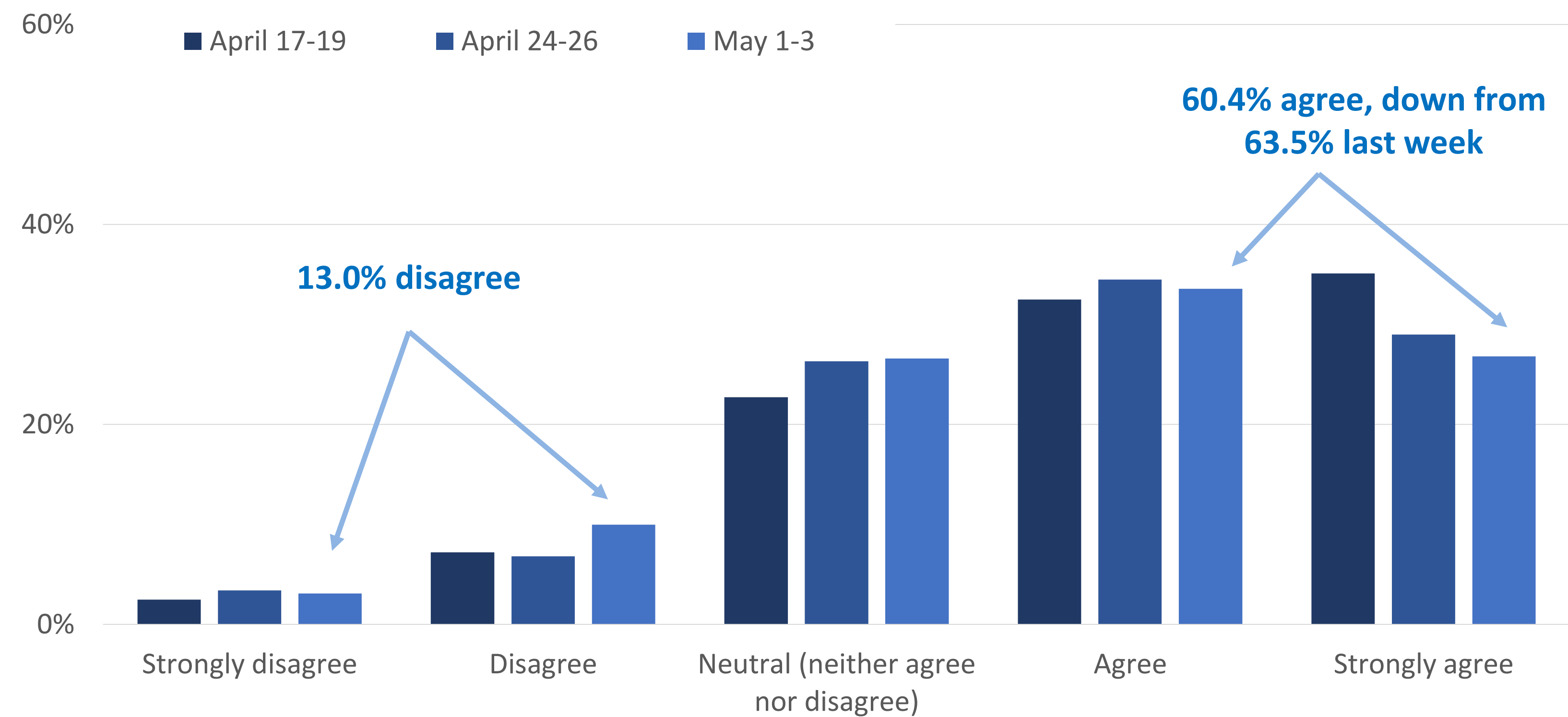
Now under three-in-five American travelers agree that they do not want travelers coming to visit their community in the current environment (60.4%—down from 63.5%). Only 13.0 percent disagree.

How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.

(Base: All respondents, 1,238, 1,208 and 1,204 completed surveys. Data collected April 17-19, 24-26 and May 1-3, 2020)

Question Added in Wave 6



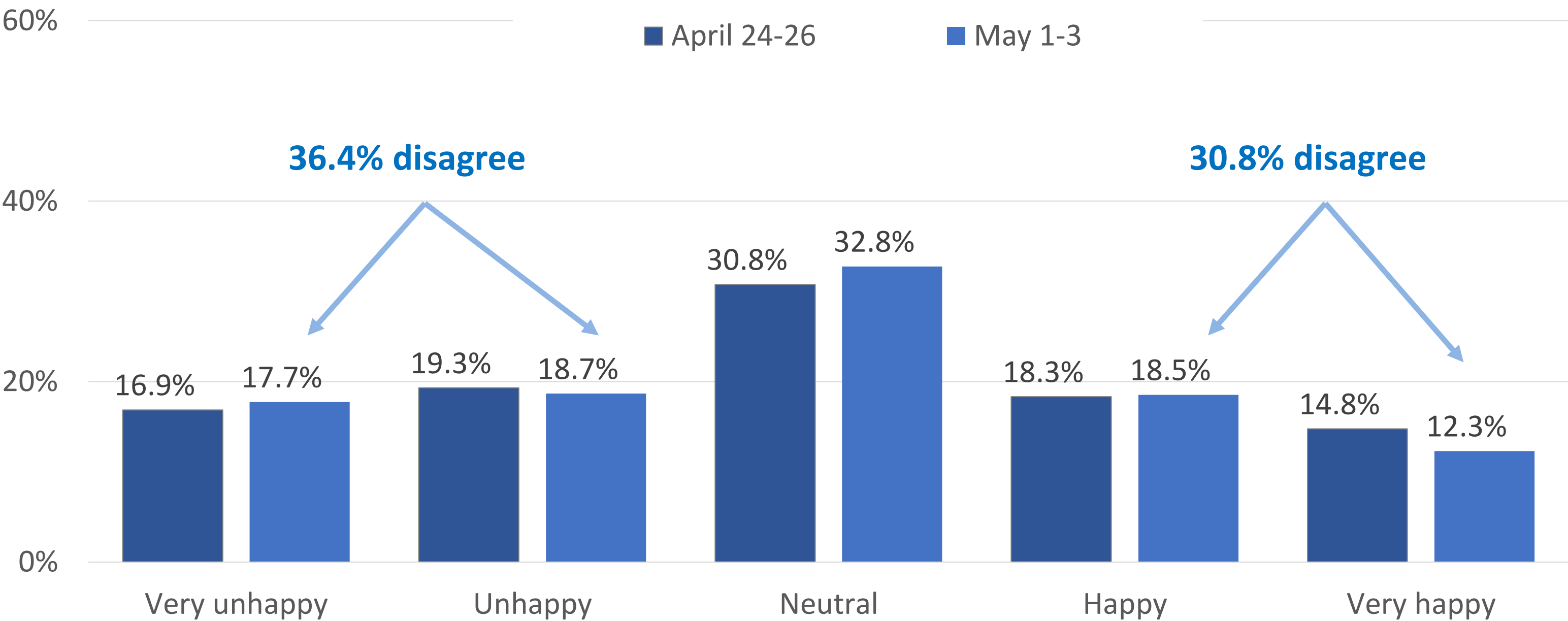
On Seeing Advertisements for Their Home Communities

Opinions continue to be split on whether destinations should currently be marketing respondents’ home communities—even for travel after the pandemic is over. While 30.8 percent said they would be happy to see such an advertisement (down from 33.1% last week), 36.4 percent said they would be unhappy.

Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

(Base: All respondents, 1,208 and 1,204 completed surveys. Data collected April 24-26 and May 1-3, 2020)

Question Added in Wave 7



Won't Travel Without Vaccine

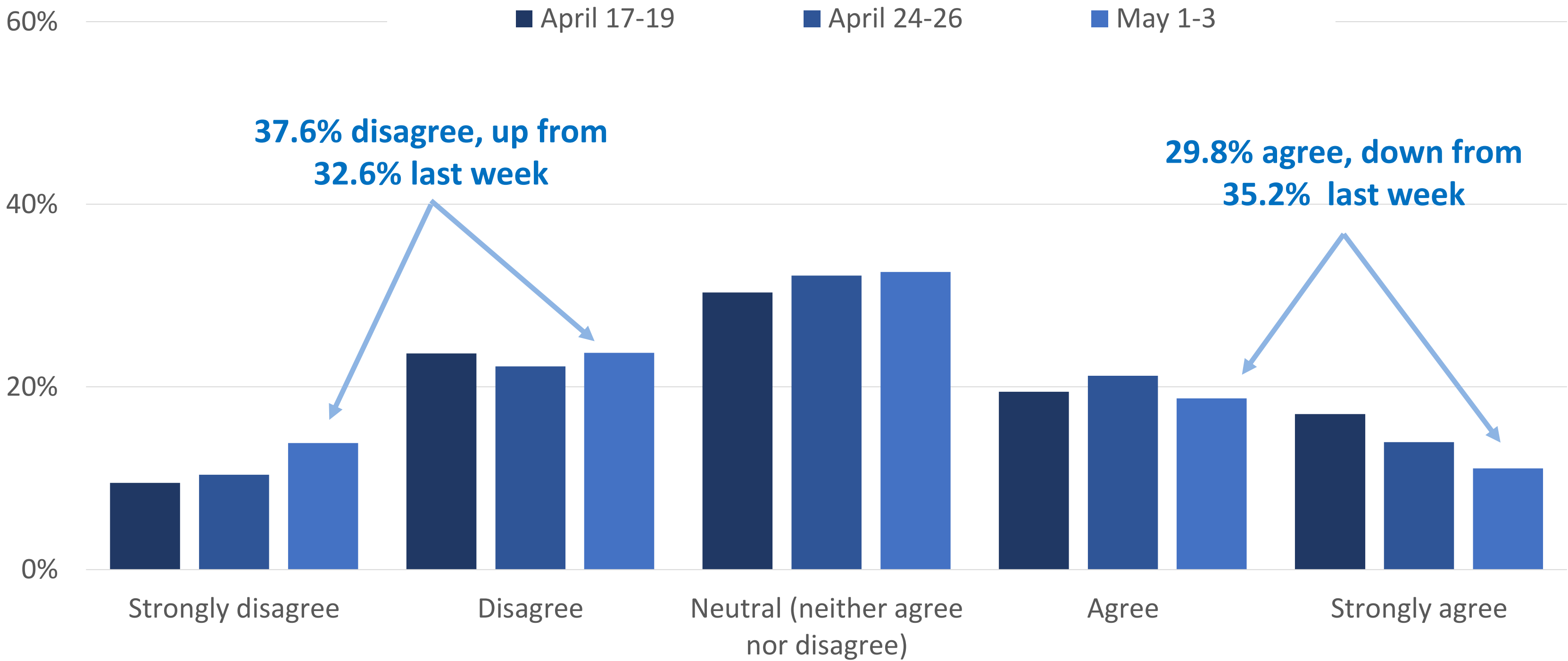
The proportion of American travelers who say they will not be traveling until a Covid-19 vaccine is developed declined this week. Now 29.8 percent agree with this sentiment (down from 35.2% last week). However, 37.6 percent currently reject this idea.

How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.

(Base: All respondents, 1,238, 1,208 and 1,204 completed surveys. Data collected April 17-19 ,24-26 and May 1-3, 2020)

Question Added in Wave 6



Comfortability with Home State Re-Opening

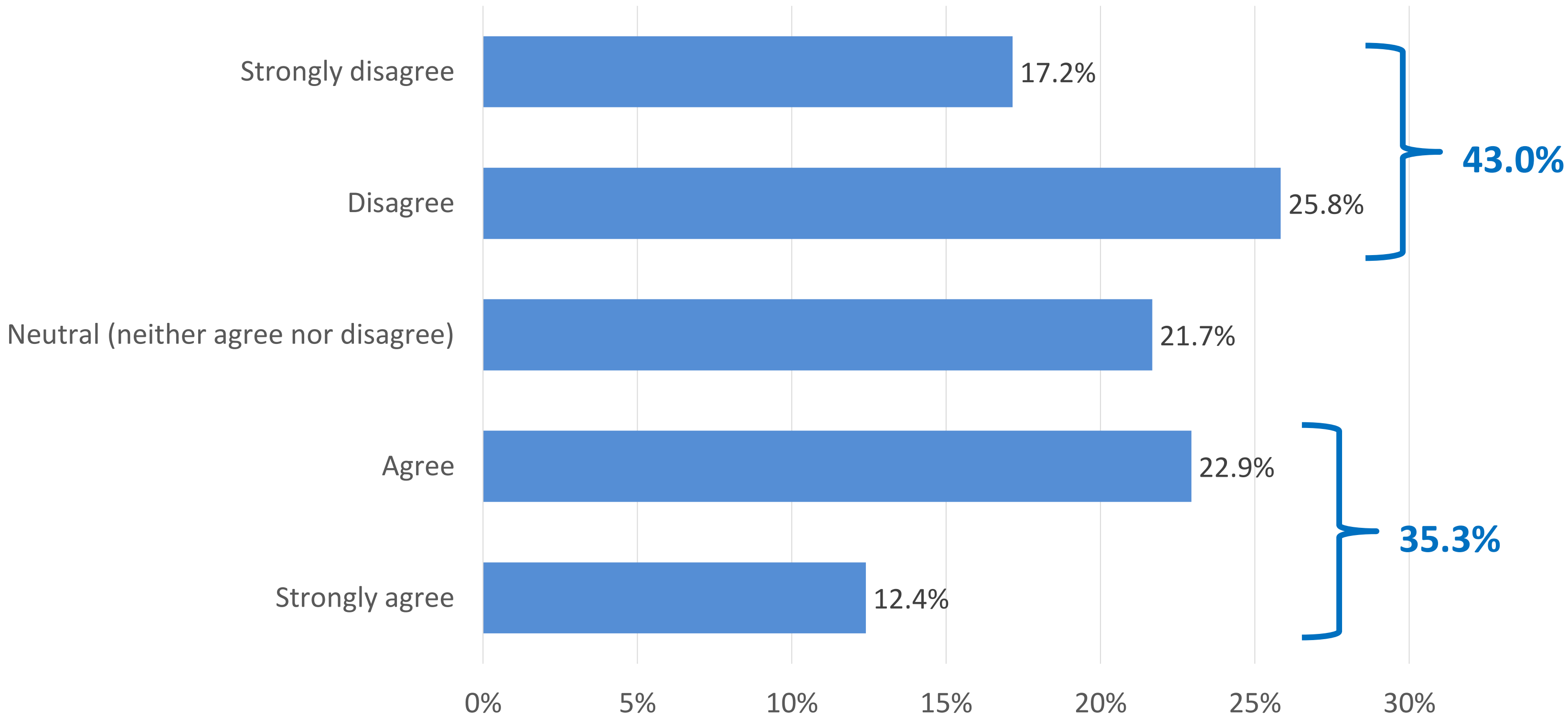
Americans appear largely uncertain about the reopening. Overall, 35.3 percent of American travelers say they are comfortable with their home state re-opening its economy right now. However, a larger proportion (43.0%) are not yet comfortable with this.

How much do you agree with the following statement?

Statement: I am comfortable with my home state re-opening its economy right now.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8



Looking Forward to Cruising Post-Covid

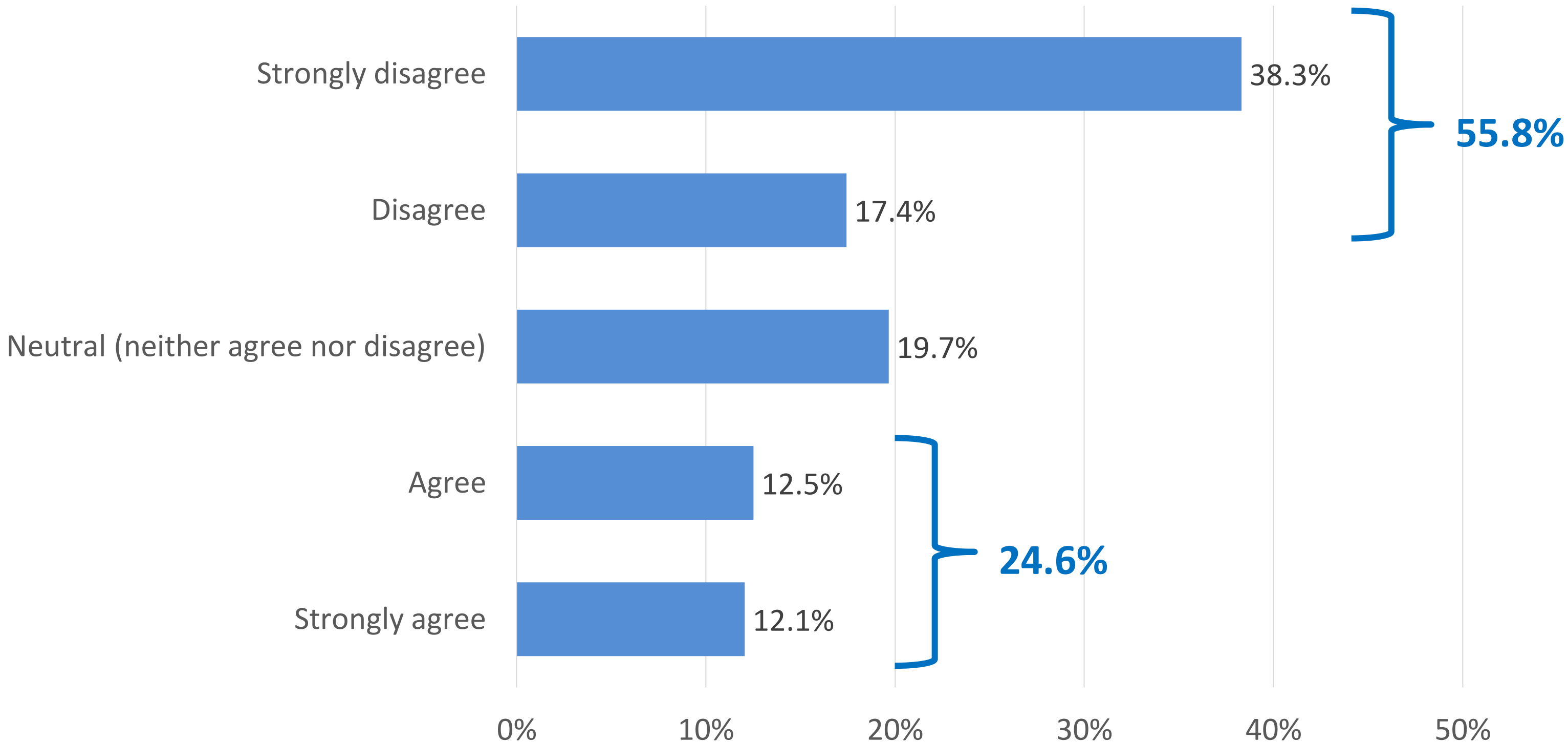
A quarter of American travelers are looking forward to taking a cruise once the coronavirus situation is resolved (24.6%). Over half though reject this idea (55.8%).

How much do you agree with the following statement?

Statement: I look forward to taking a cruise (at least one night one board ship) at some point after the coronavirus situation is resolved.

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

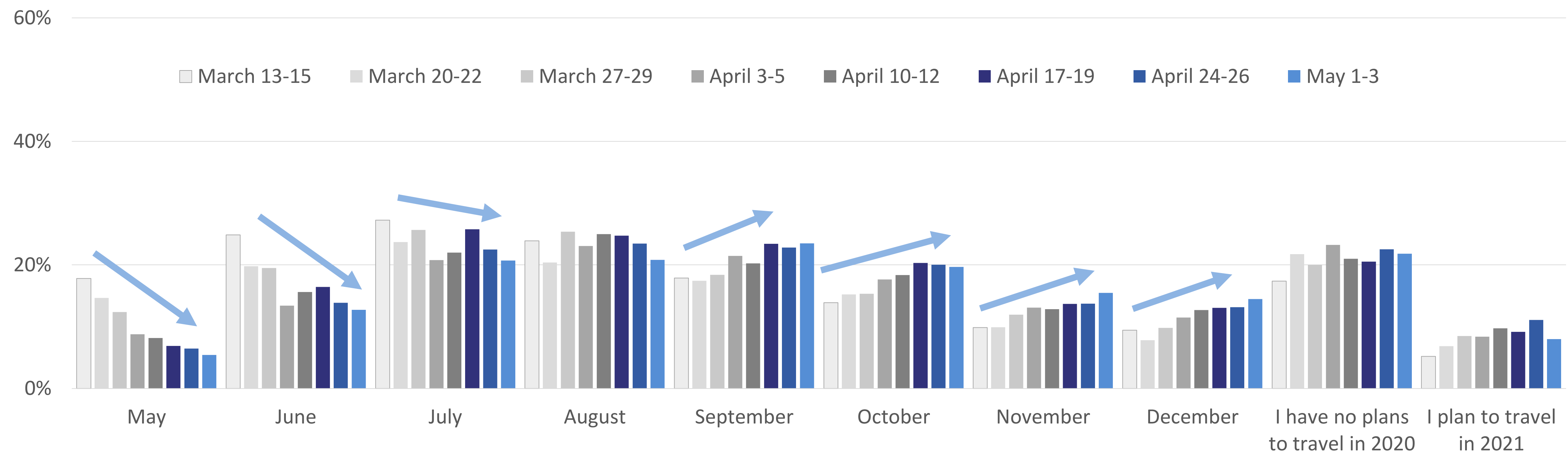
Question Added in Wave 8



Upcoming Travel Plans

As we have seen in past waves, while the scheduling of leisure trips in the next two months has fallen sharply, there appears 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, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

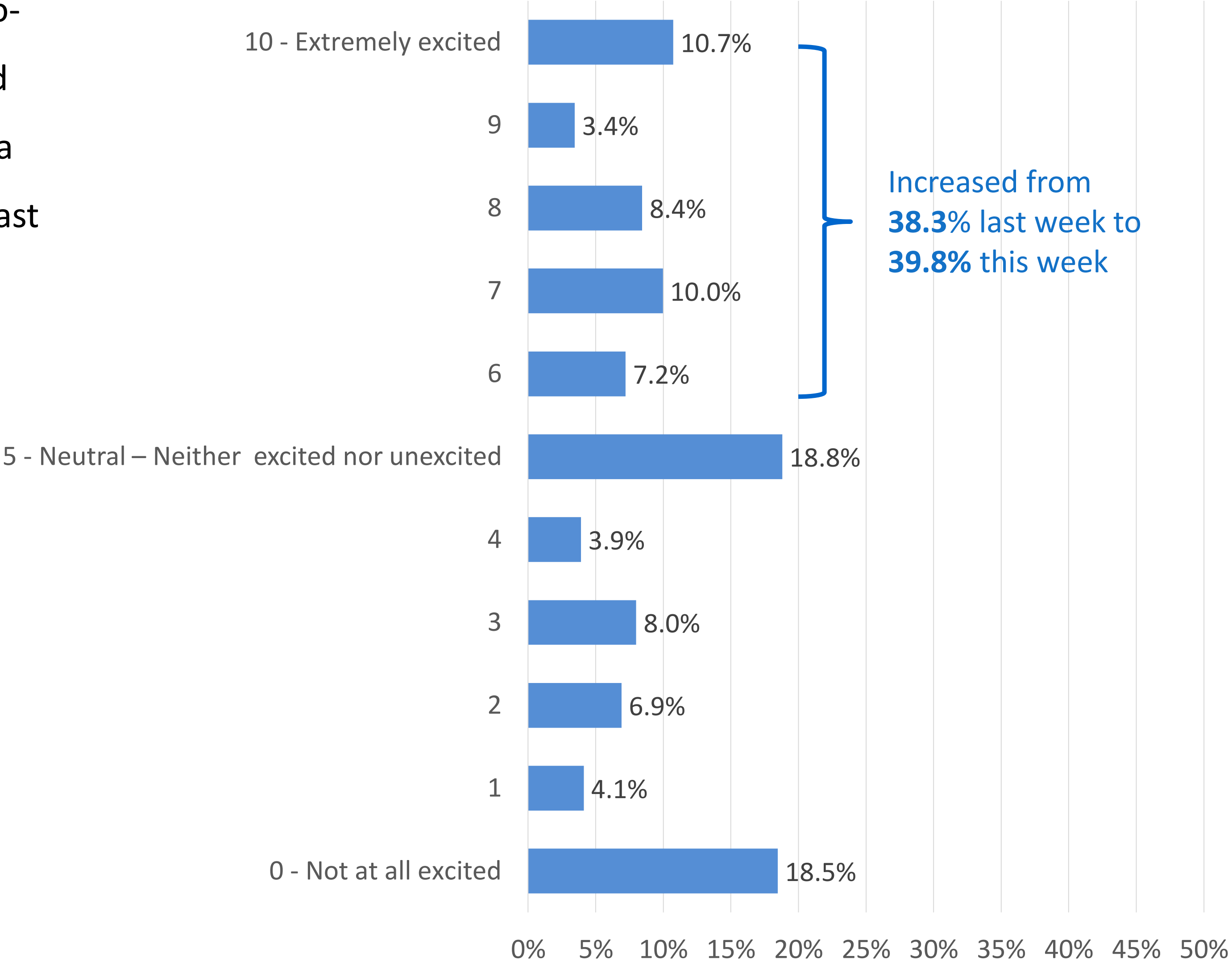
Excitement to Travel Now

Interest in even short trips increased slightly this week. Two-in-five American travelers (39.8%) 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 38.3 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, 1,204 completed surveys.
Data collected May 1-3, 2020)*

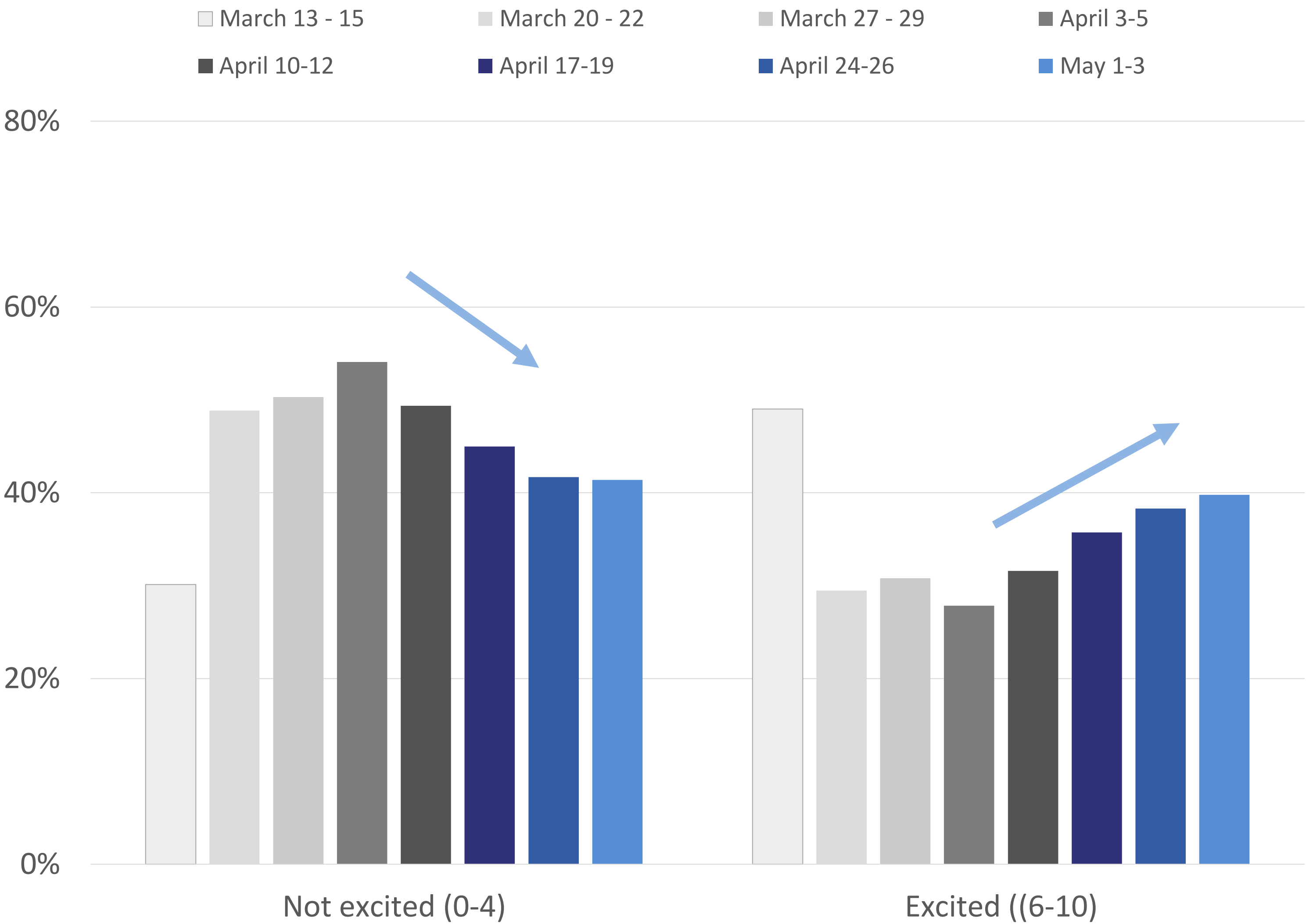


Excitement to Travel Now (Excited vs. Not Excited)

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, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

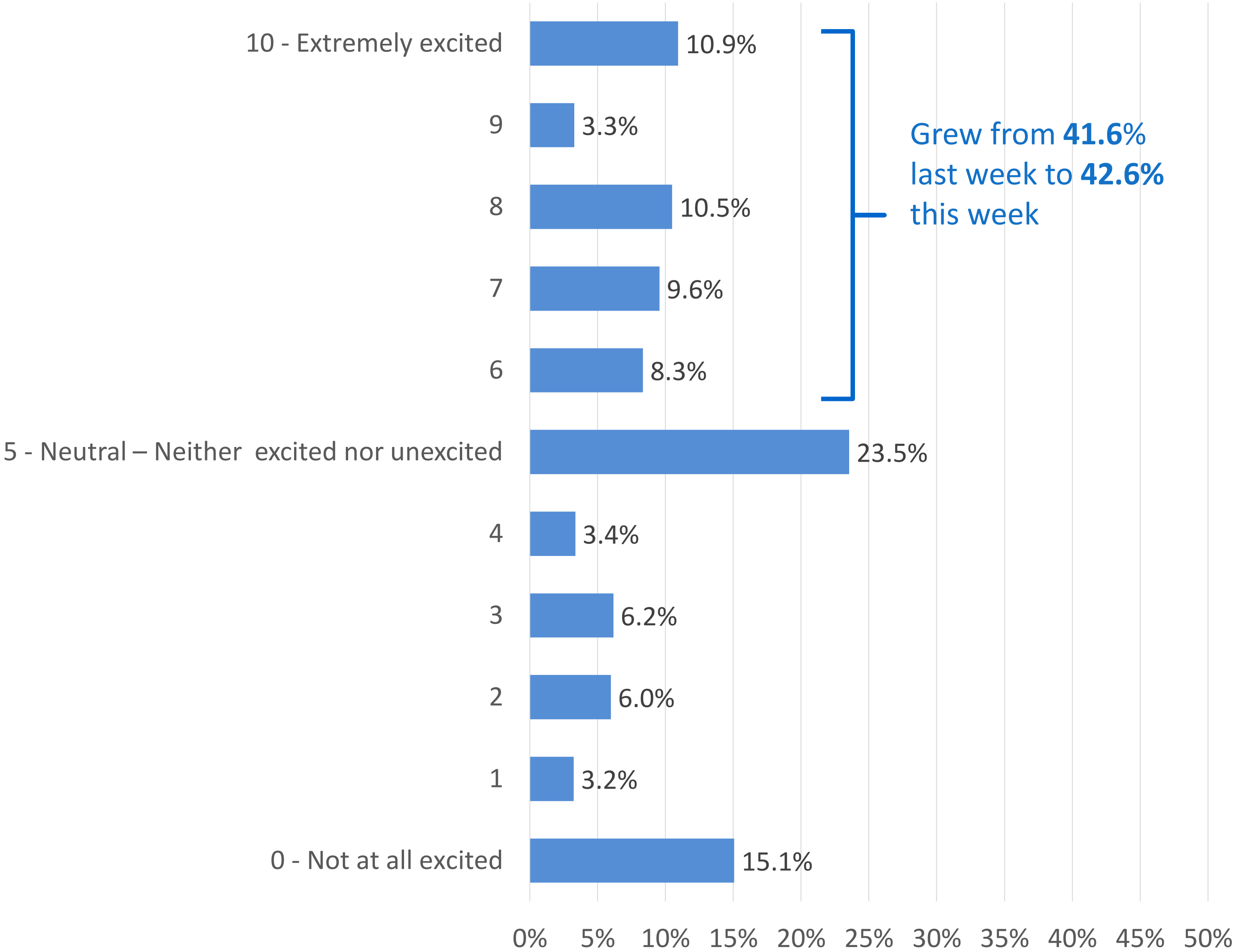


Openness to Travel Information

Travelers’ interest in learning about new travel experiences and destinations edged up very slightly this week. Four-in-ten (42.6%) expressed some level of excitement about the topic, up from 41.6 percent last week.

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

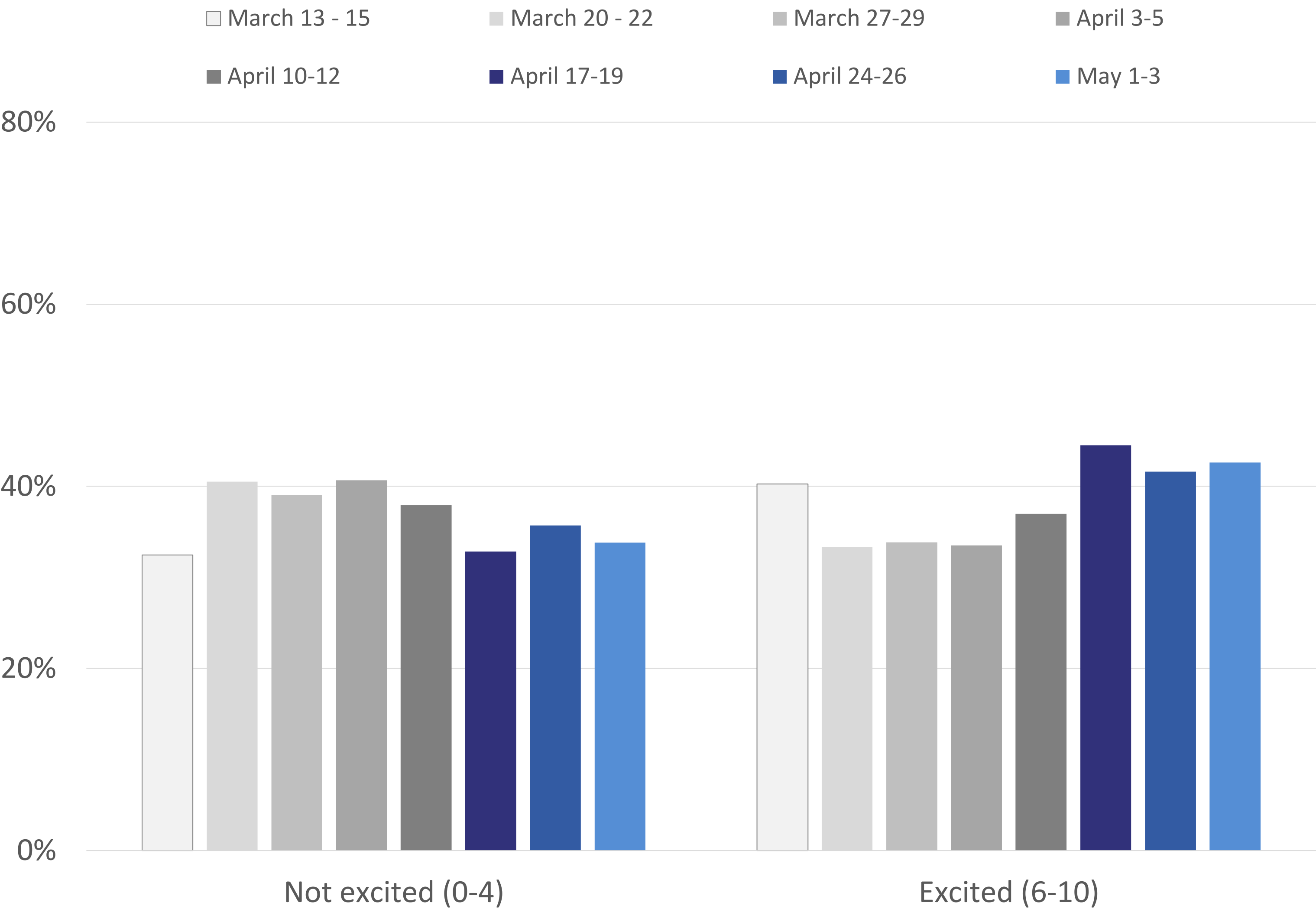
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Openness to Travel Information (Excited vs. Not Excited)

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, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

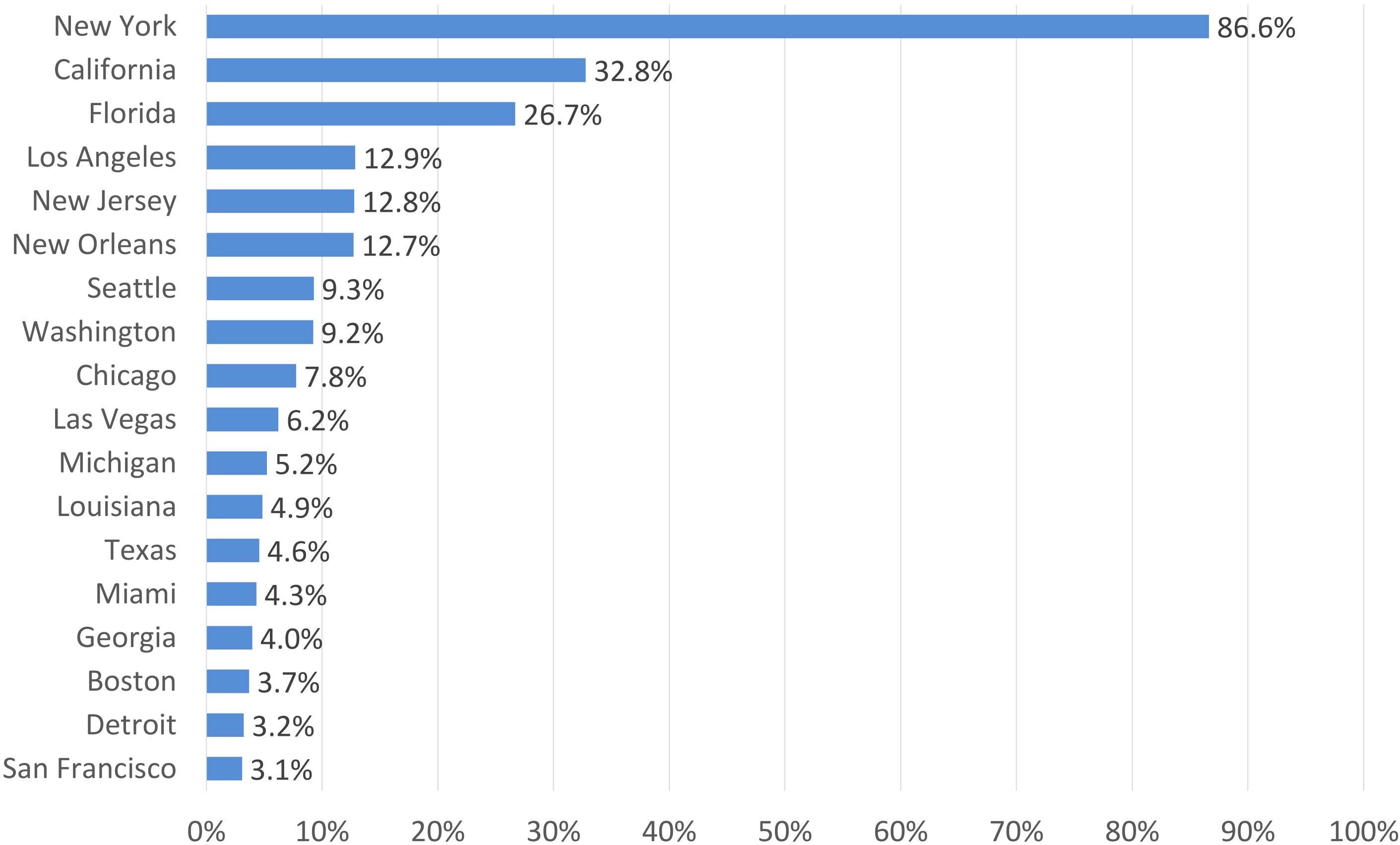


Most Talked About Coronavirus Hotspots

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

(Base: Wave 8. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

New York continues to be the most talked about destination with coronavirus issues. Nearly 87 percent of survey respondents identified New York as one of the three most talked about places.





Coronavirus Travel Sentiment Index

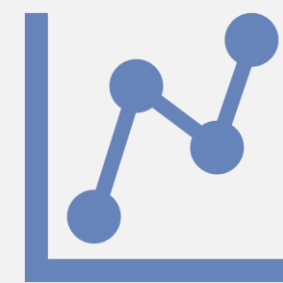
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 4th

What is a Predictive Index?



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



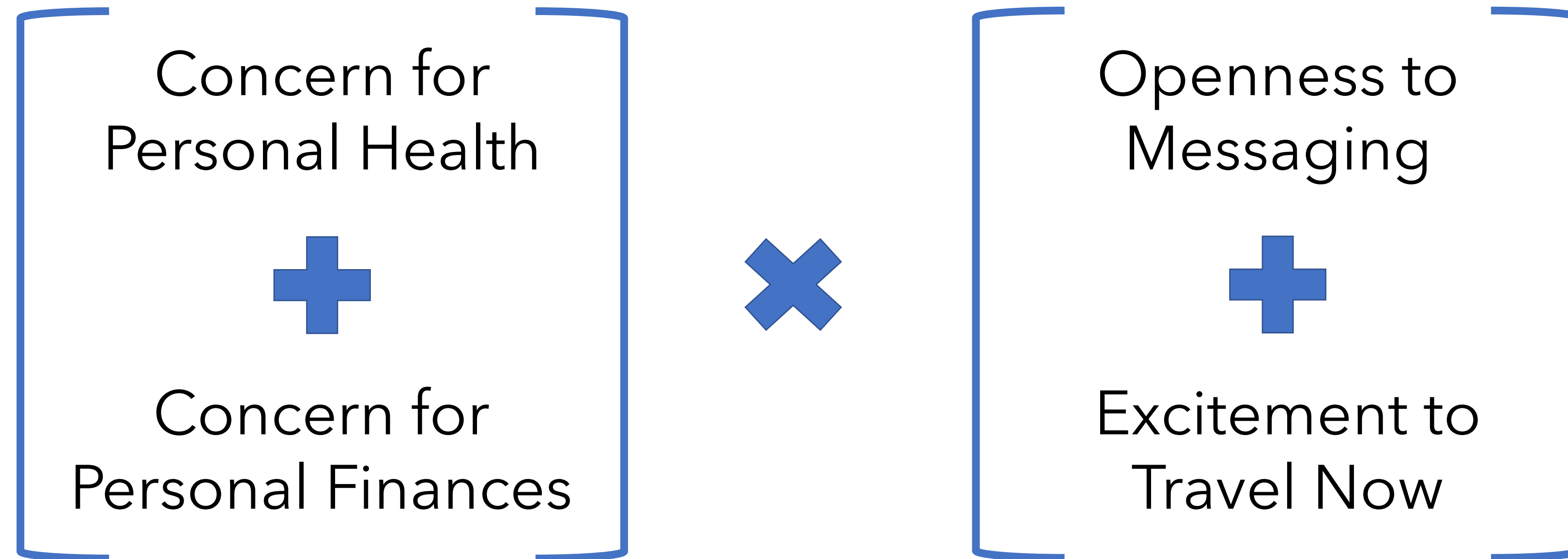
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

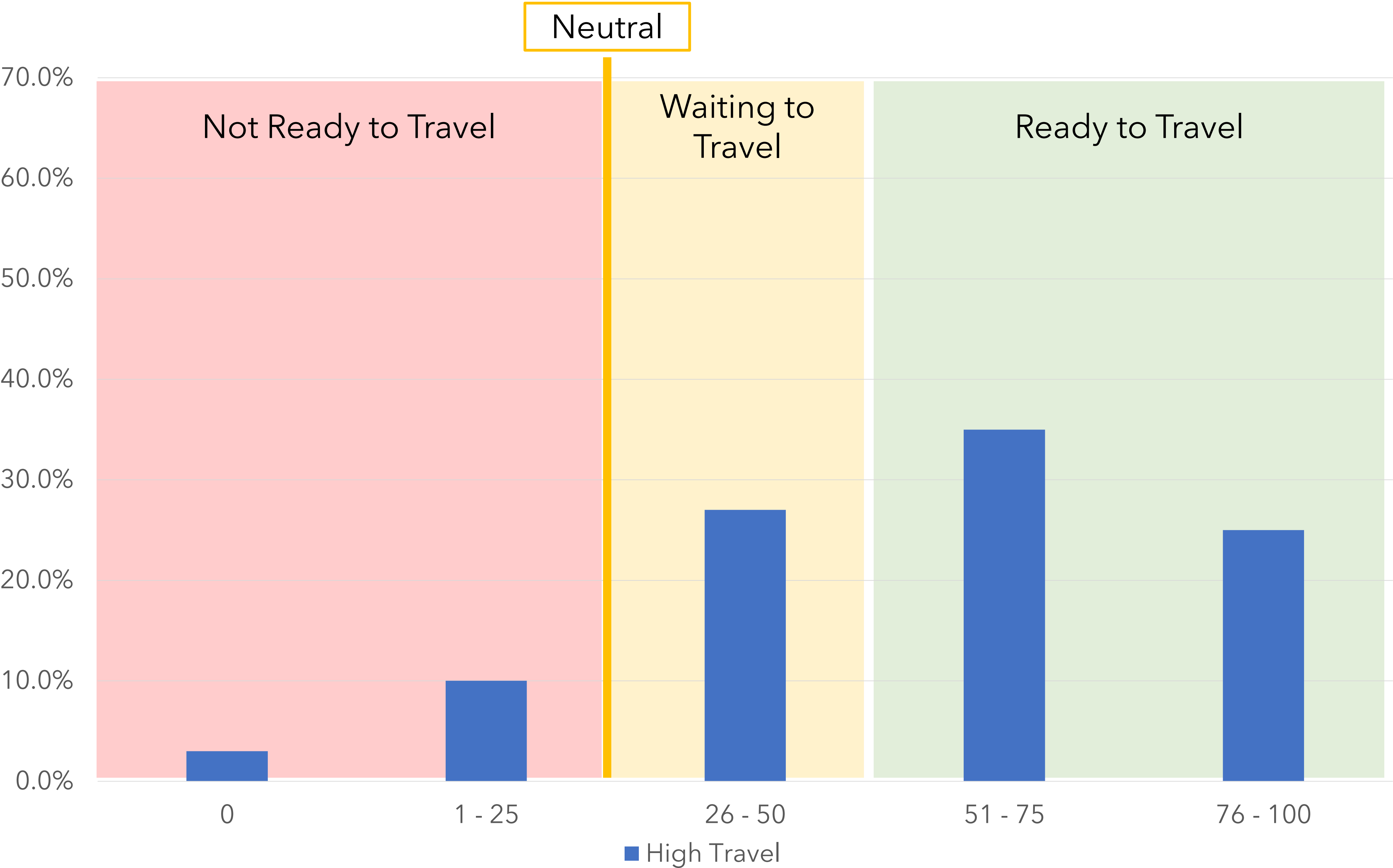
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

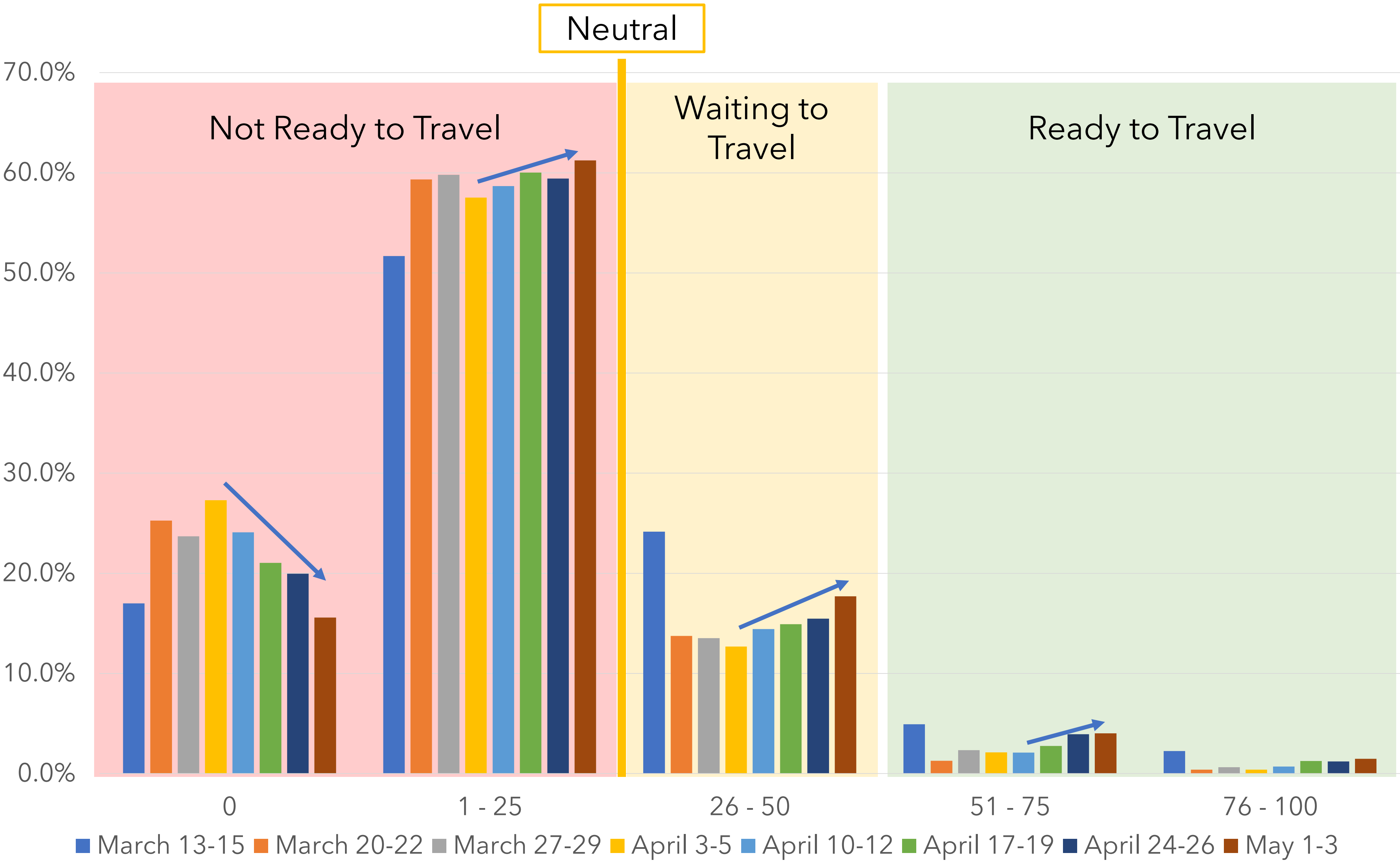


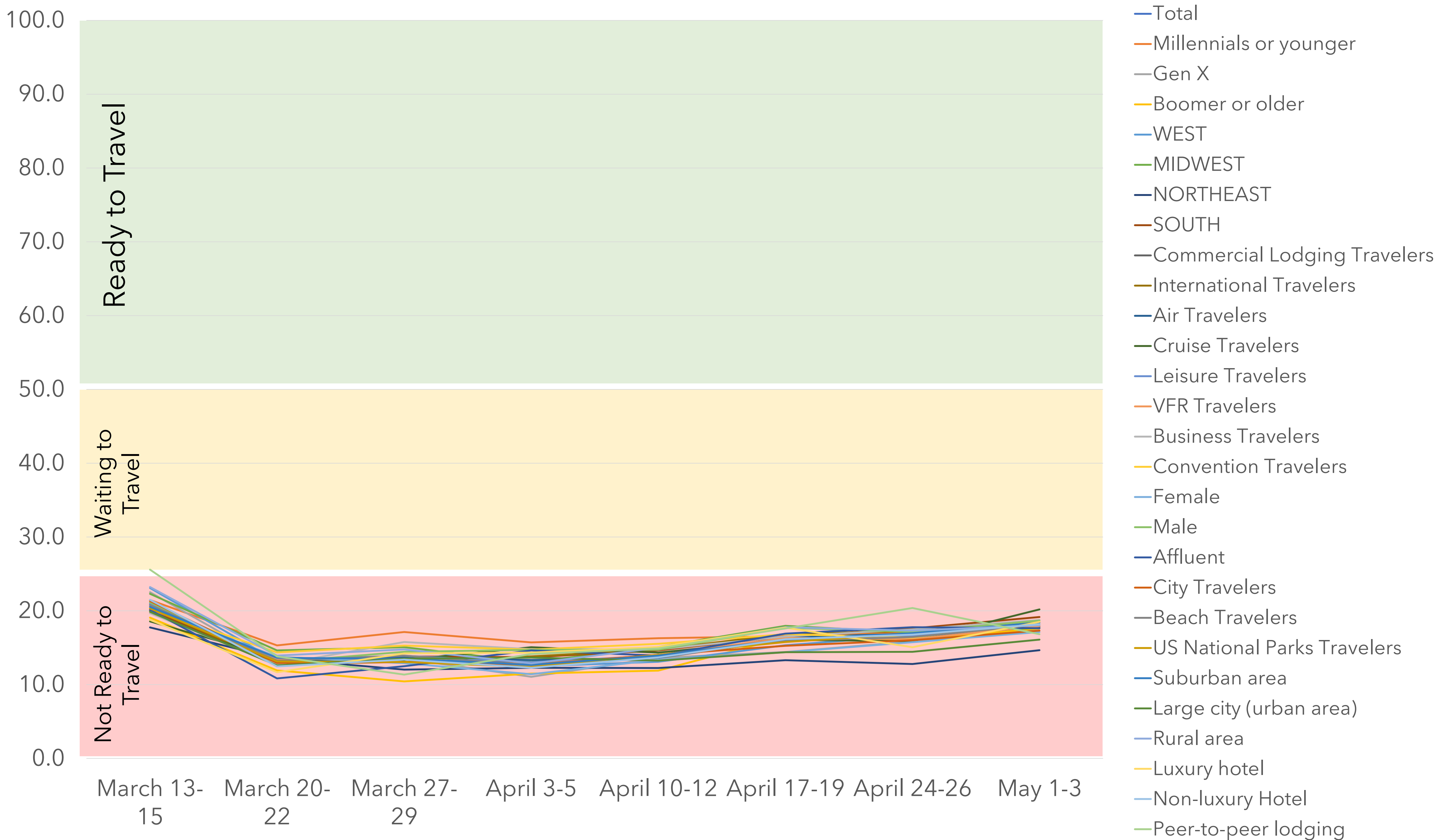
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook: Week of May 4th

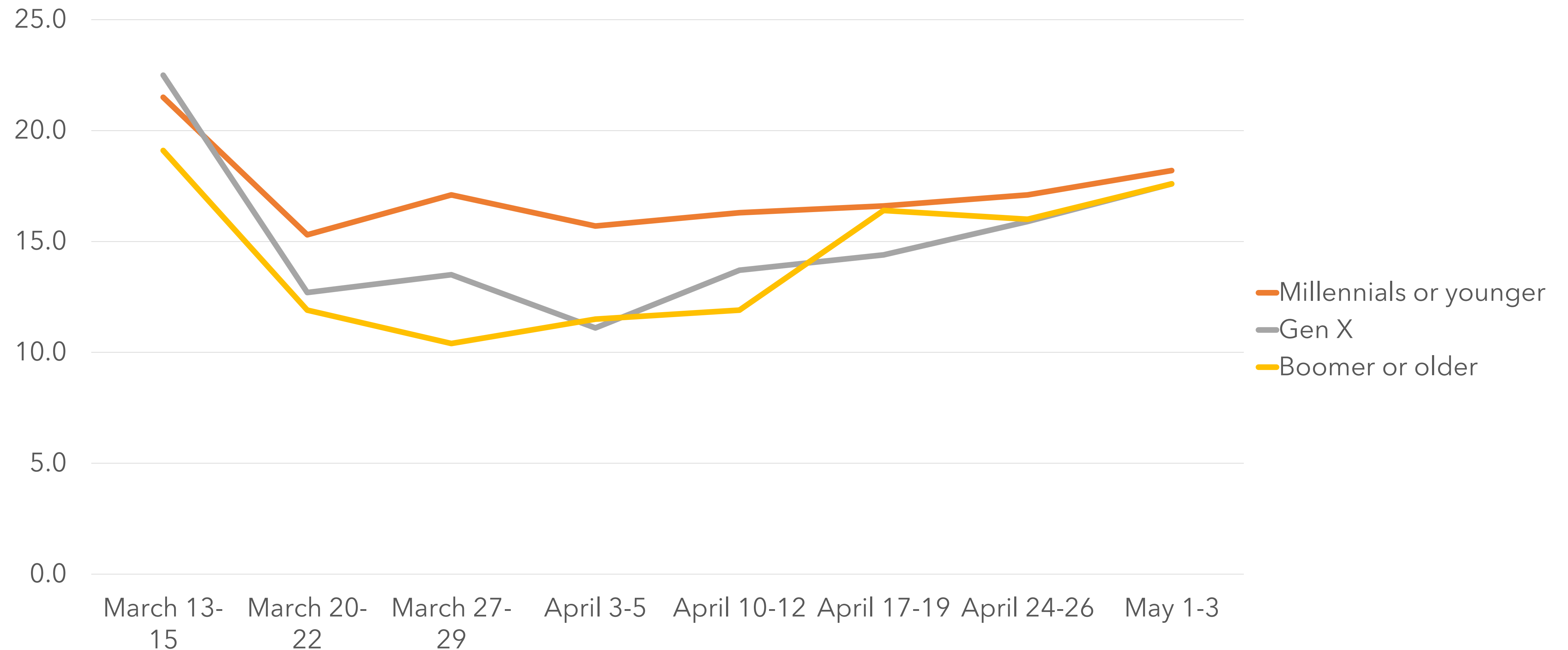




Generation

Points of Interest Impacting Index Scores:

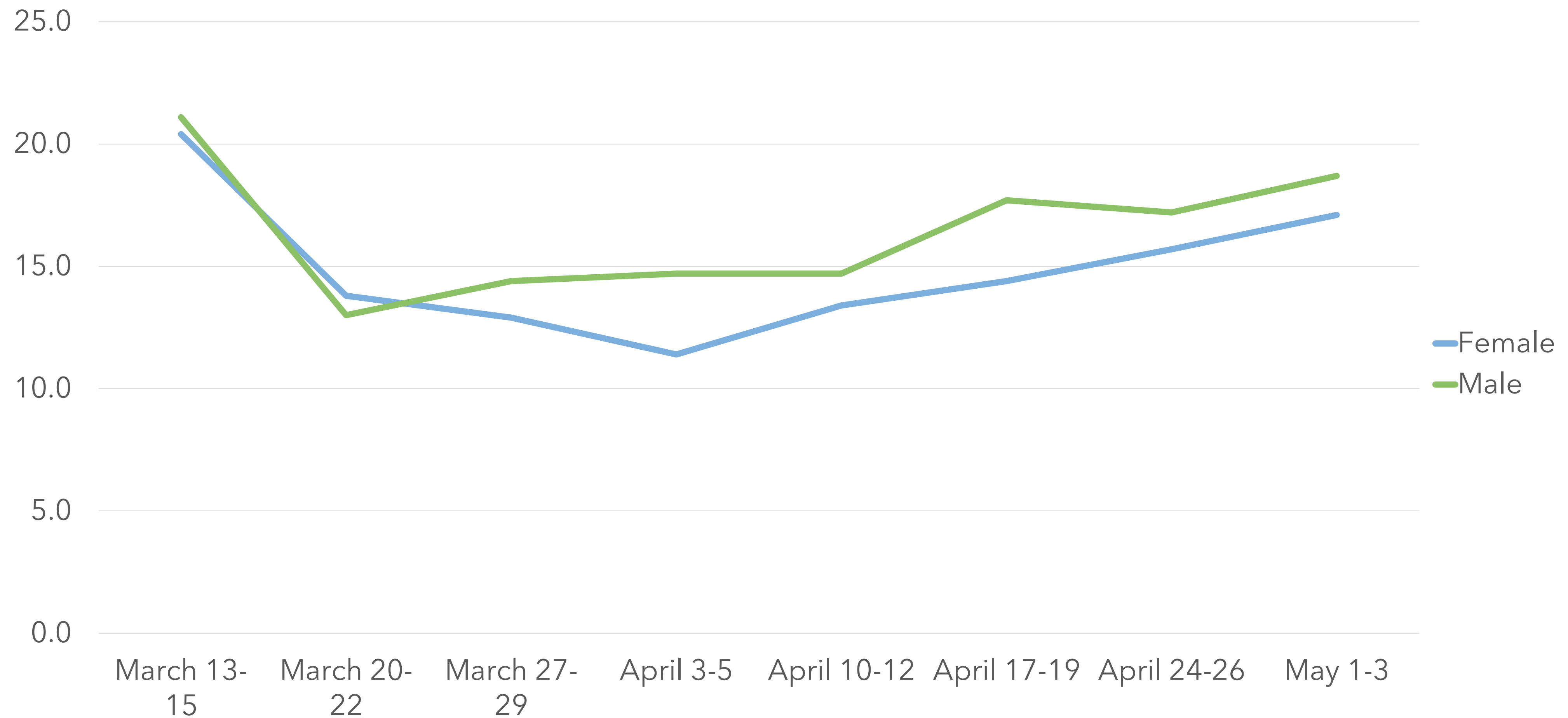
- All generations this week showed similar levels of concern for personally contracting the virus, a significant shift from the differences seen in previous weeks.
- Boomers this week continued to show the most concern for the national economy.
- Millennials are the first to show a decrease in travel affected by the virus week over week.



Gender

Points of Interest Impacting Index Scores:

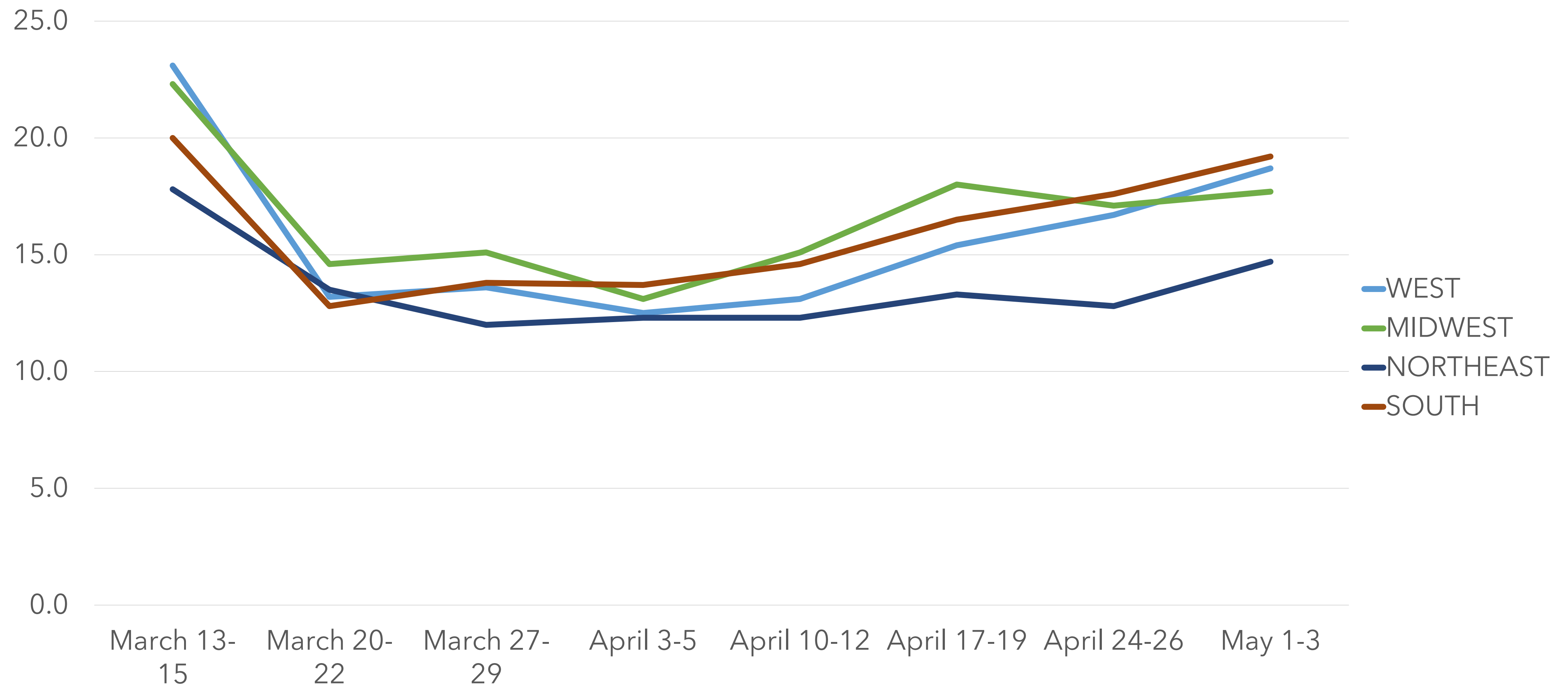
- Men and Women continued to report similar levels of both safety and financial concerns this week (previously women showing more concern)
- Men however continue to show more excitement to travel now and more openness to travel messaging
- Men more likely to say they are comfortable with their home state re-opening its economy right now (40.6% vs 30.9% for women)

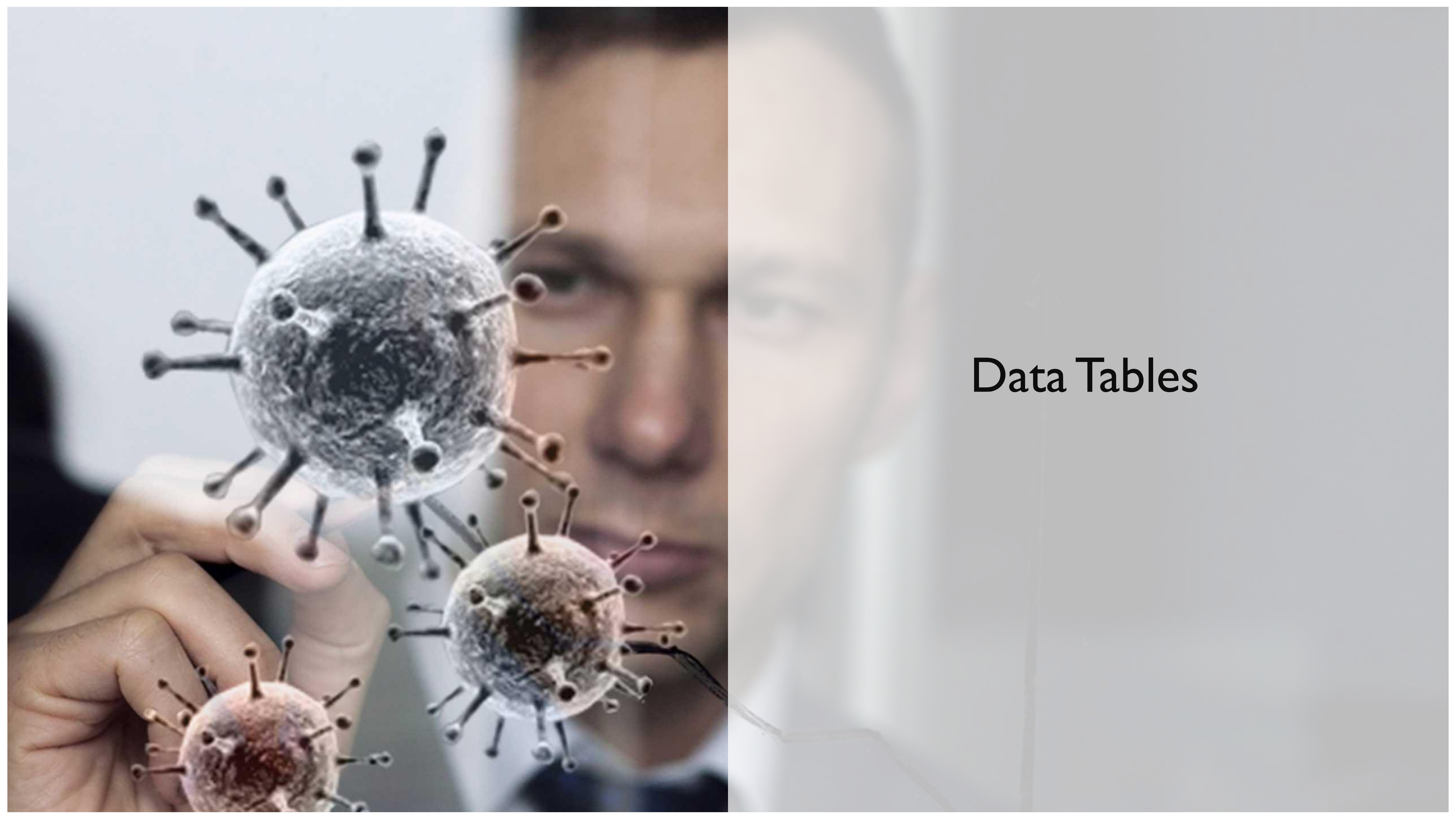


US Region

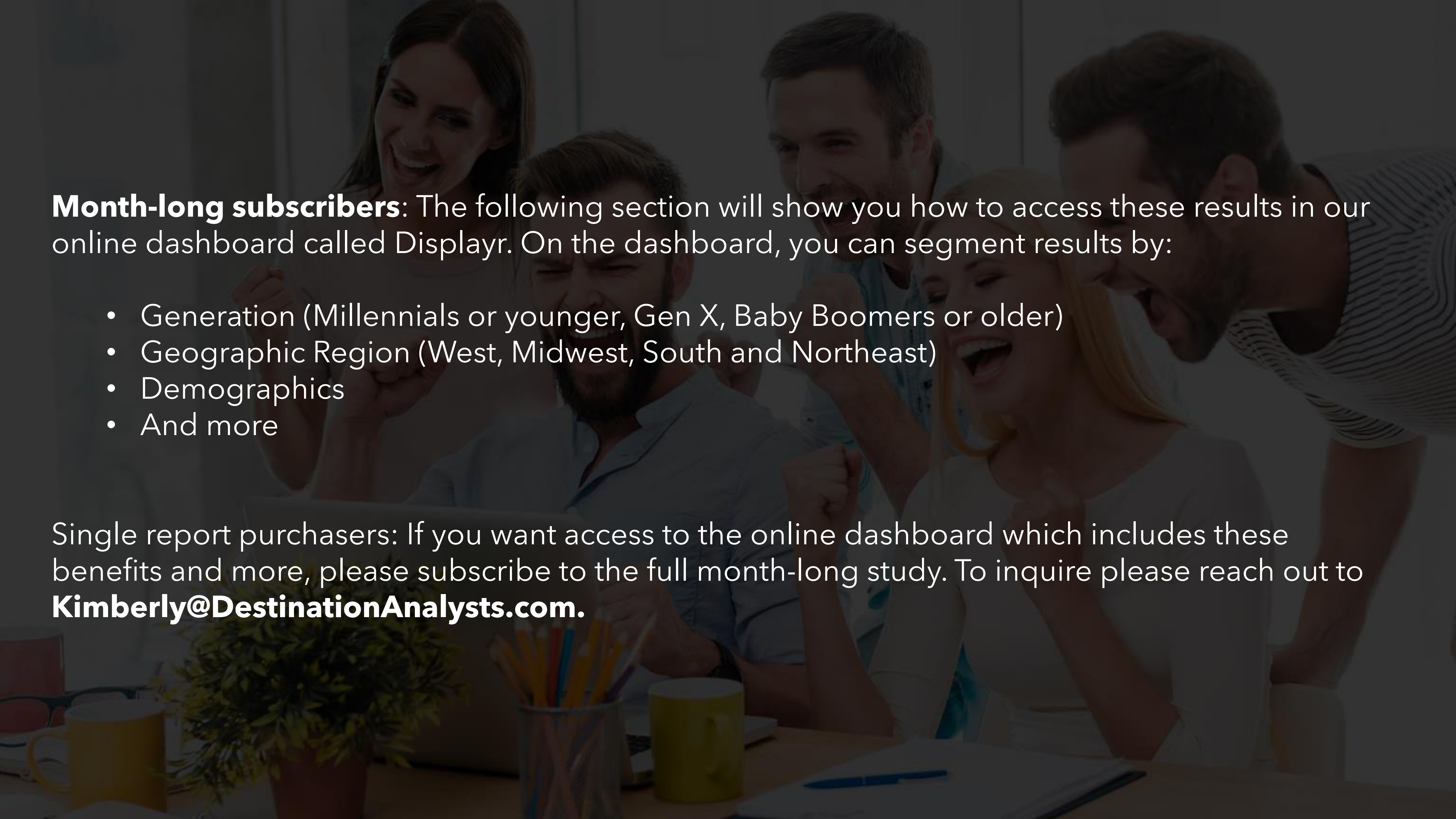
Points of Interest Impacting Index Scores:

- Northeast continued to report the highest levels of personal concern for contracting the virus this week, consistently higher than other regions
- South showed highest expectation to being traveling again by Fall 2020 and continued to show the most openness for travel messaging this week
- Although Midwest continued to be the least optimistic, all regions showed an increase in optimism this week being more likely to say the Coronavirus situation will get better or much better in the next month





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.



NAVIGATING THE DASHBOARD:

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

Coronavirus Travel Sentiment Index Report

Filters ▾

Export ▾

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↕

↕

↕

Search...

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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

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

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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

Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination Analysts

FILTERING THE REPORT:

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

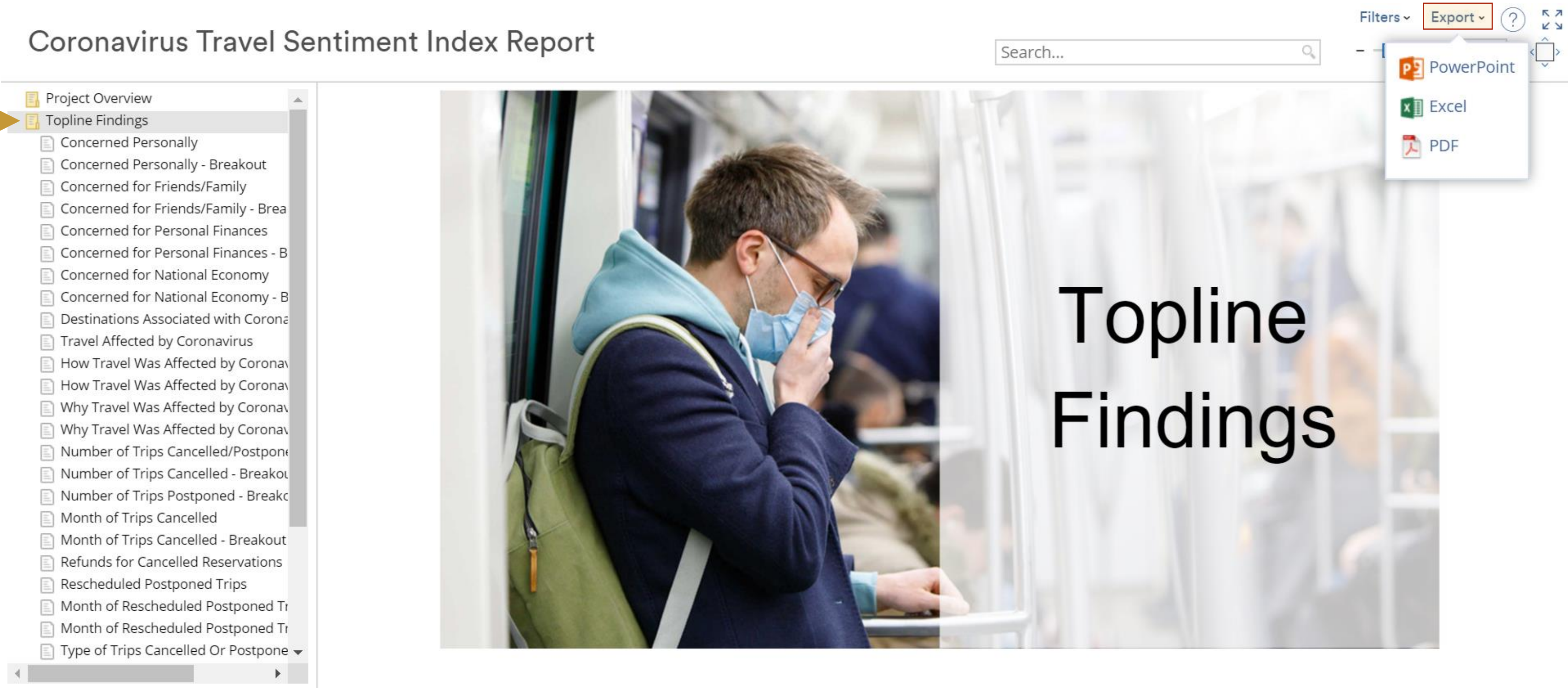


IMPORTANT NOTE: When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

EXPORTING THE DATA:

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

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

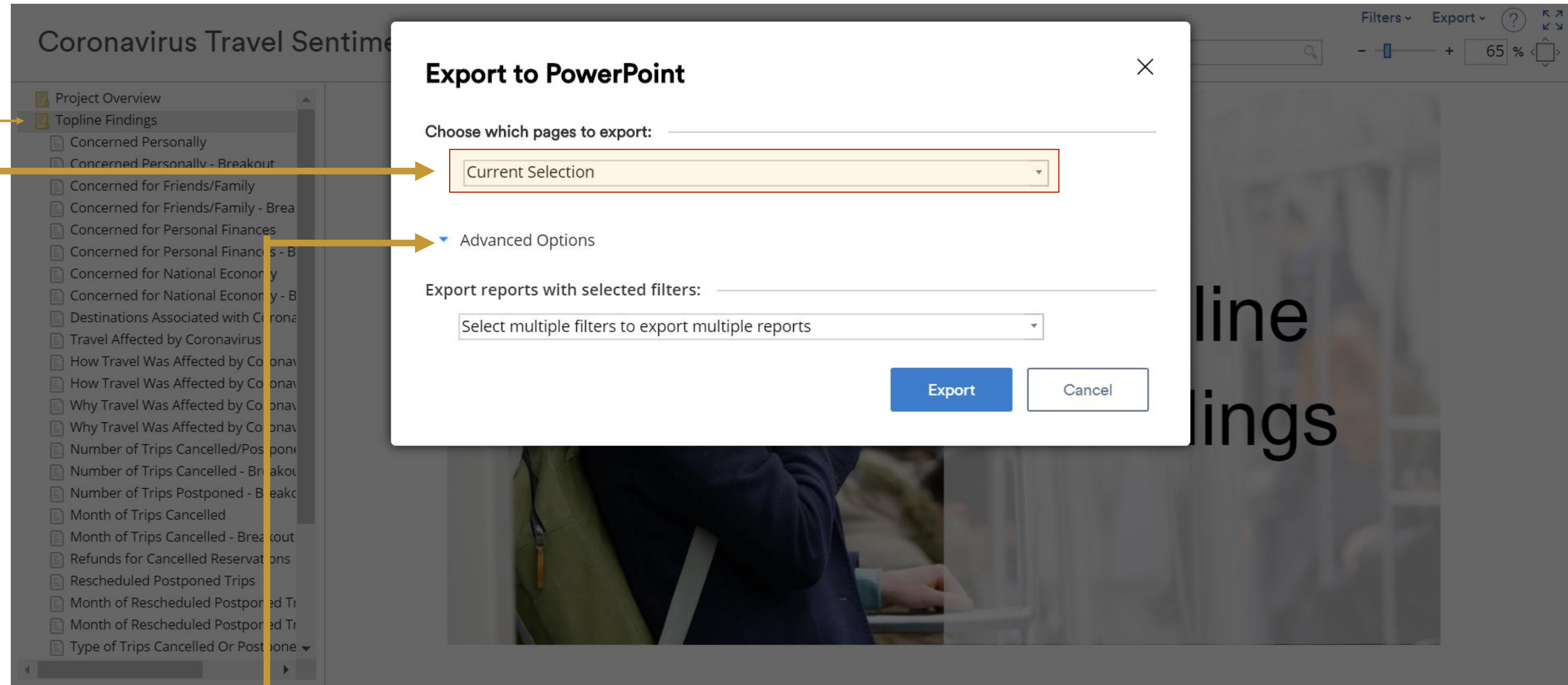


EXPORTING THE DATA:

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

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

“All” will allow you to download the entire report.



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

NEED MORE HELP?

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

Chingun Ganzorig

Research Manager

Chingun@DestinationAnalysts.com

(415) 722-2503

