

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 9

RESEARCH FINDINGS

May 11, 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 ninth wave of this survey was collected from May 8-10, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,200 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



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Project Overview

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

Moving forward. The COVID-19 situation is rapidly evolving, and its impact on the travel industry is far from clear. As a result, Destination Analysts plans to conduct this survey weekly into the foreseeable future. Weekly reports were, or will be, released on the following schedule.

Map of U.S. Showing Survey Regions

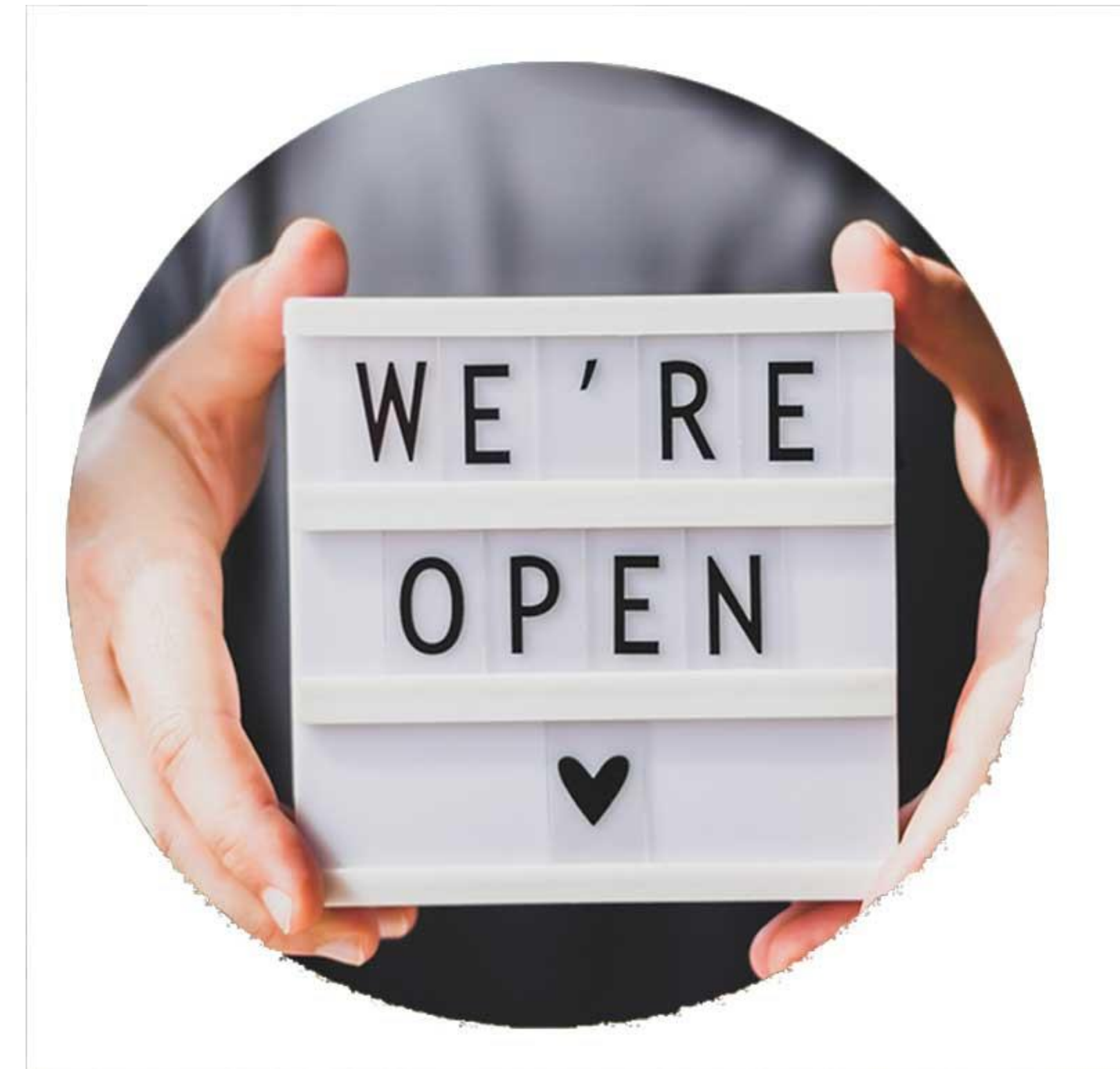


	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18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

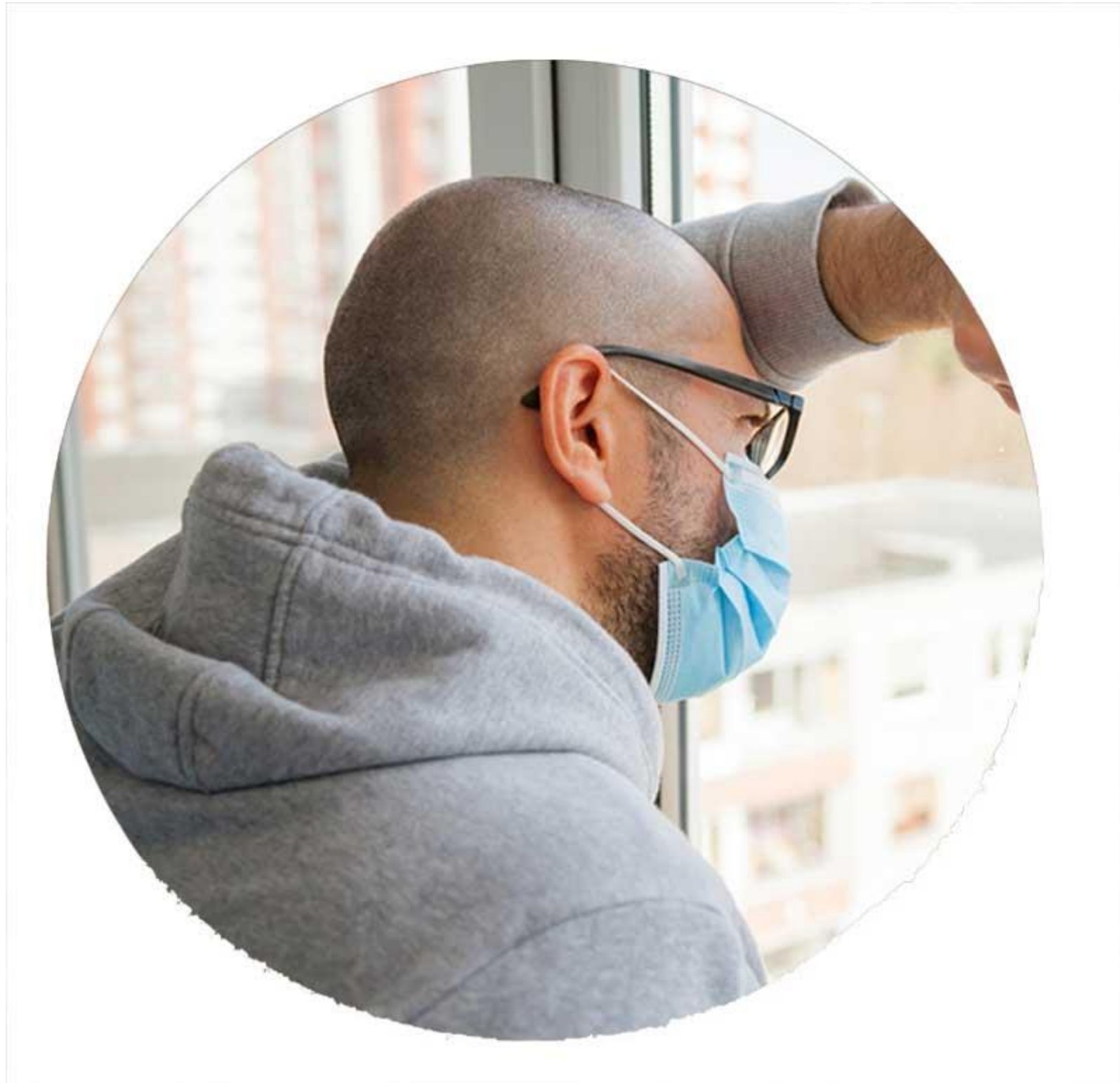
Key Findings

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

- **Traveler worries about contracting the coronavirus remain high.** Now, 71.9 percent of survey respondents say they have some level of concern about contracting the virus, down slightly from 72.6 percent last week. For the fifth week in a row, concerns about the health of friends and family dropped again slightly, with 75.0 percent expressing concern for the safety of their loved ones, down slightly from 77.3 percent last week.
- **Concern that the pandemic will impact Americans' personal finances decreased this week, moving from 66.5 percent to 64.6 percent.** 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.
- **Traveler ratings of the safety of various travel activities improved again this week.** In the ninth survey wave, the proportion of travelers rating each activity as either "Somewhat unsafe" or "Very unsafe" decreased for most activities again.



Key Findings



- **Optimism that the severity of pandemic will improve in the next month declined this week.** Now 44.3 percent expect the coronavirus situation to get worse in the next month, up from 35.1 percent last week.
- **Overall excitement to get back out on the road decreased very slightly this week, as 68.7 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.**
- **Unchanged from four weeks ago, relatively few American travelers expect to jump right back into traveling after the coronavirus situation abates.** Just 1-in-10 say they will “jump right back in” while a vast majority will adopt a more conservative approach.
- **Most American travelers appear unlikely to take a trip by commercial air in 2020.** Nearly a third (32.2%) said they expect to take their next commercial airline trip sometime next year.

Key Findings

- **While one-in-five travelers say they won't take their next road trip until 2021, over one-in-ten say they will take such a trip this summer.** The majority of “next” road trips are expected to be a distance less than 500 miles from home. 3-in-4 travelers say they will travel within this distance from home on their next road trip.
- **Given a list of things many travelers have not been able to enjoy since the pandemic, vacations emerged as the most missed activity.** More than 2-in-3 travelers said they missed vacations “terribly” or “a lot.”
- **Approximately half (49.6%) of travelers say that a restaurant stating they follow state government guidelines to prevent the transmission of the coronavirus would make them more interested in visiting the restaurant.**
- **Just under 1-in-5 travelers (17.8%) recall having seen a destination advertisement at some point in the past month.** Despite low overall recall, travelers appear to be enjoying the destination ads that they do recall. 56.3 percent of travelers say the last destination ad they saw made them feel happy or very happy.



Key Findings



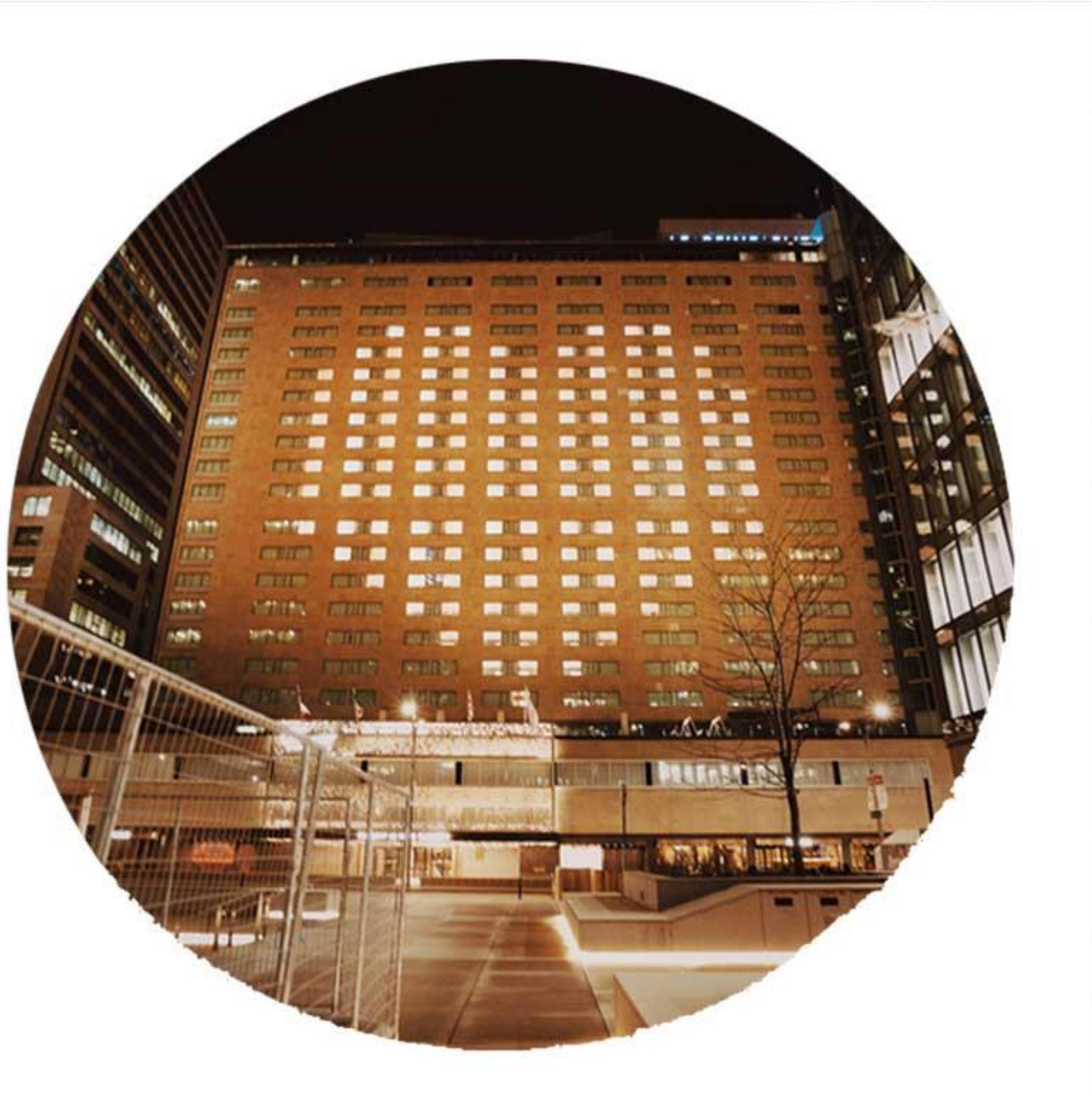
- **Travelers report that the channels they would be most receptive to being pitched by destinations are websites and email campaigns.** Suggesting these more traditional approaches shouldn't be neglected in these challenging times. When asked what the single best way to reach travelers was, the most frequently selected response was email.
- **Cancellations.** 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 1.9 trips due to the crisis. Cancellations of May, June and July trips has increased significantly this week. One-in-three (33.6%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure rose this week.
- **Postponements.** Approximately 6-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.
- **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.

Key Findings

- **How do travelers want to be spoken to in this environment?** With a tone of honesty. Presented a list of potential tones, travelers were asked how they would most want a destination to speak to them. An honest, friendly, no-nonsense approach appears to be favored. Authoritative and serious tones were reported to be the biggest turn-offs. An interesting finding in this current climate of uncertainty.
- **About half of travelers expressed an interest in watching virtual tours of travel destinations.** Slightly more popular, virtual tours of hotels were seen as interesting by 53.6 percent of travelers. About 1-in-3 travelers said they would be interested in joining online destination watch parties, if they had the time and found the destination appealing.
- **DMOs appear to be the most widely trusted resource amongst travelers at the moment.** Nearly 1-in-2 travelers said state or local tourism offices were somewhat trusted or trusted completely to provide information about travel safety.



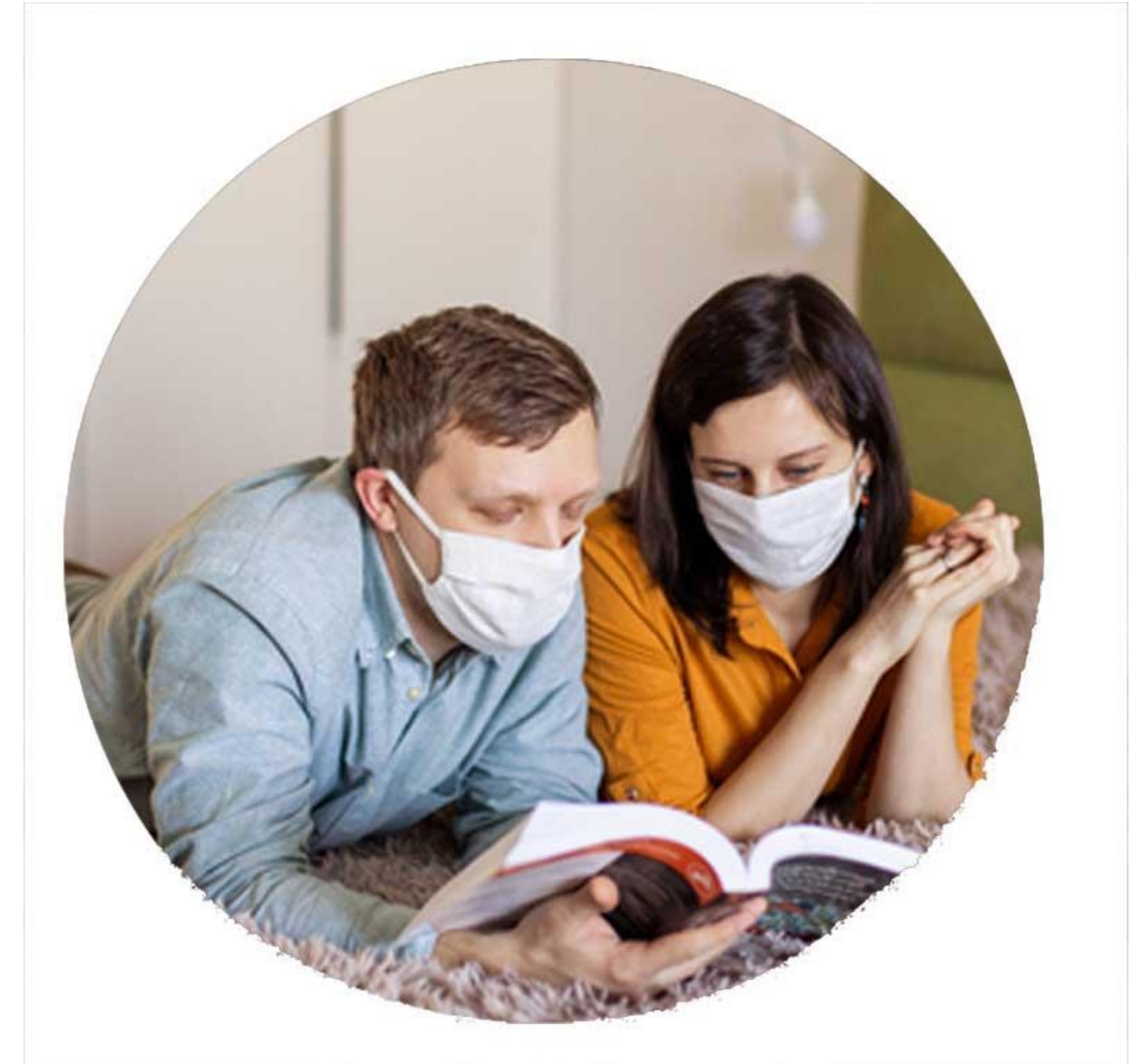
Key Findings



- **In the ninth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus remained relatively stable at 74.1 percent.** This week, the proportion of American travelers reporting they have cancelled trips due to the coronavirus fell to 65.9 percent from 69.4 percent last week. The proportion of travelers being fully refunded for cancelled trips rose this week. 69.6 percent report receiving full refunds.
- **Interest in even short trips increased again slightly this week.** 4-in-10 travelers (44.3%) 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 39.8 percent last week. Travelers’ interest in learning about new travel experiences and destinations was unchanged this week. Four-in-ten (42.9%) expressed some level of excitement about the topic.
- **New York continues to be the most talked about destination with coronavirus issues.** Nearly 84 percent of survey respondents identified New York as one of the three most talked about places.

Key Findings

- This week, just under two-thirds (64.8%) of American travelers say they are done traveling until the coronavirus situation blows over. Strong agreement with this statement has declined significantly.
- Agreement that the coronavirus situation will be resolved by the summer travel season continues to decline. Now, 56.7 percent of Americans disagree that the coronavirus situation will be resolved before summer (up from 53.4% last week).
- Americans' optimism for travel to return in the fall declined this week. Now, only 42.3 percent expect to be back traveling this Fall (down from 48.2% last week).
- Opinions on staycations replacing vacations this summer has grown. This week, 55.0 percent of American travelers agree that staycations may end up replacing vacations this summer (55.0% vs. 51.0% last week).
- Up from last week, 42.0 percent of Americans now say car travel may displace some of their air travel this year.



Key Findings

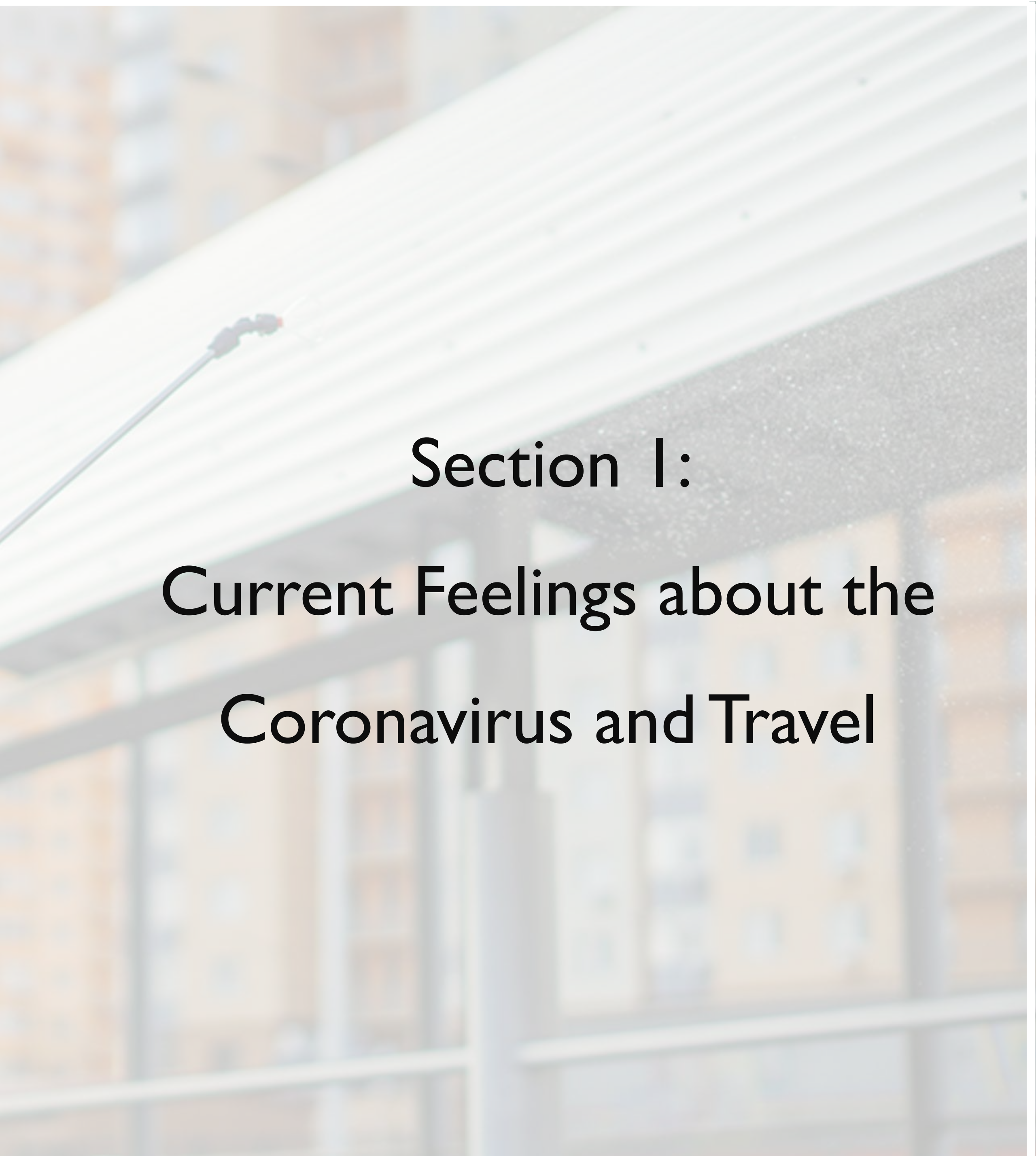


- Half (50.3%) still say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus (up slightly from last week at 48.8%).
- The likelihood of American travelers attending meetings in the current environment remains low. Under three-quarters of travelers (73.3%) say they will be unlikely to attend these events until the coronavirus situation is over (similar to last week at 73.9%).
- A majority (76.1%) still say they are unlikely to travel abroad until the coronavirus situation is resolved—down slightly from last week at 78.2 percent.
- American travelers are still largely uncomfortable about going out in their own communities to enjoy themselves. Less than a third (31.0%) say they are comfortable going out in their community (similar to 30.6% last week).
- Price cuts resonate with over a third of American travelers. When asked if price cutting made traveling in the next three months more interesting, 35.0 percent agree (unchanged from last week at 35.6%).

Key Findings

- Nearly two-thirds (64.7%) of American travelers say they have been taking action to try to support local businesses where they live (down slightly from 66.4% last week).
- American travelers largely do not want other travelers visiting their communities in the current environment. Now, 63.5 percent agree with this sentiment (up from 60.4% last week). Only 13.0 percent disagree.
- Opinions continue to be split on whether destinations should currently be marketing respondents' home communities—even for travel after the pandemic is over. While 31.2 percent said they would be happy to see such an advertisement (up slightly from 30.8% last week), 37.8 percent said they would be unhappy.
- Opinions are split on whether states should be reopening now. This week, 36.5 percent of American travelers say they are comfortable with their home state re-opening its economy, but a slightly larger proportion (40.2%) are not comfortable with this.





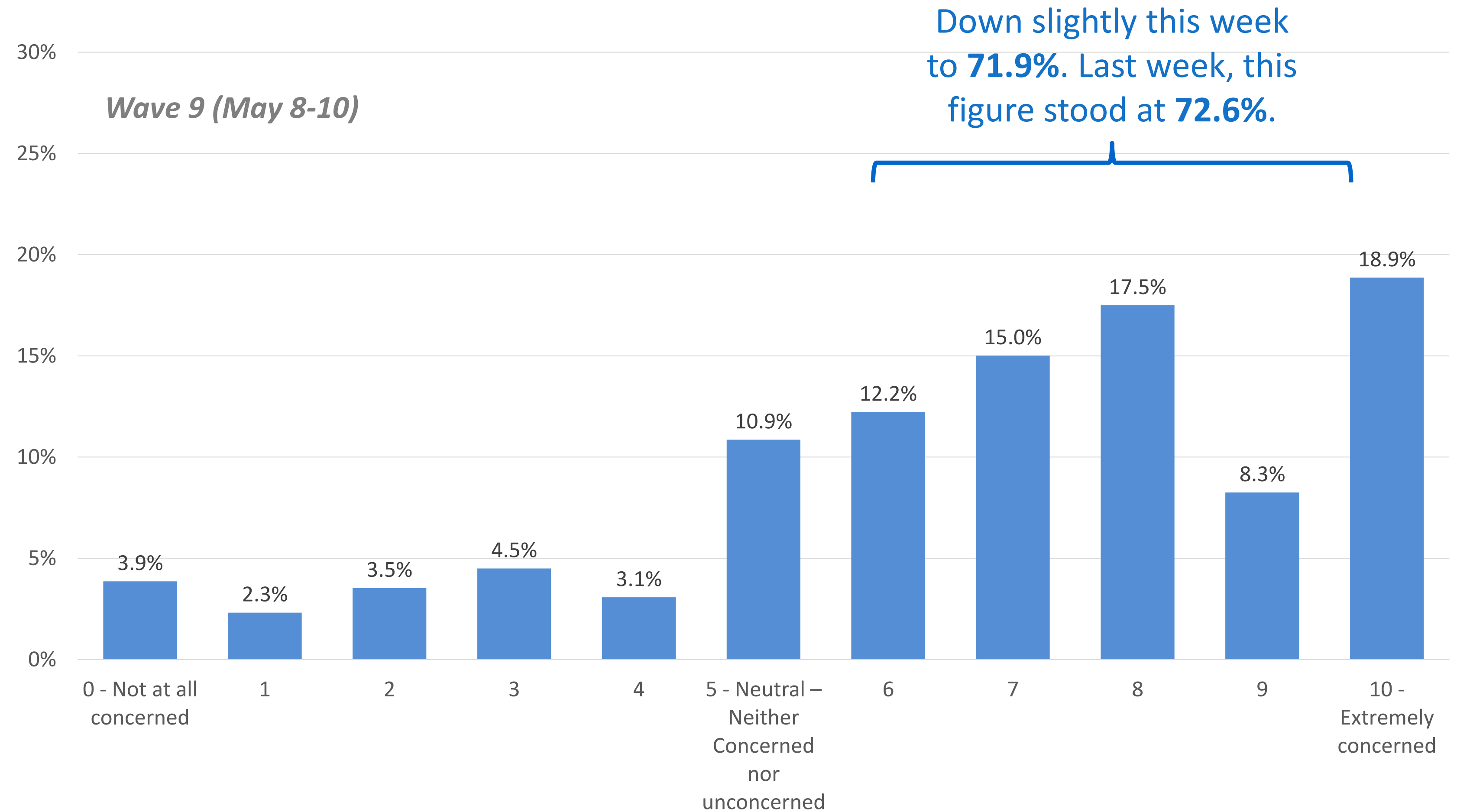
**Section I:
Current Feelings about the
Coronavirus and Travel**

Personal Health Concerns

Traveler worries about contracting the coronavirus remain high. Now, 71.9 percent of survey respondents say they have some level of concern about contracting the virus, down slightly from 72.6 percent last week.

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

(Base: Wave 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

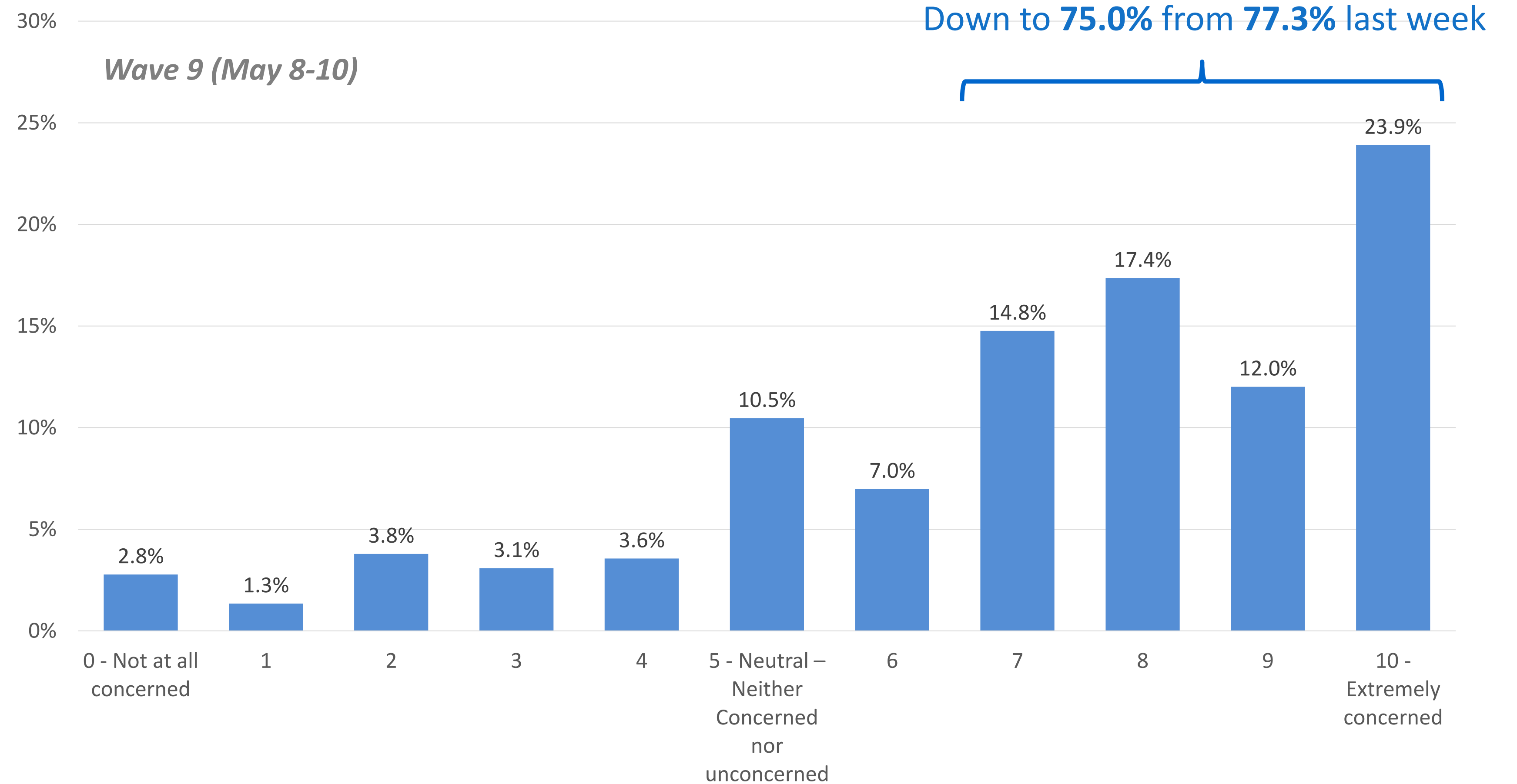


Health Concerns (Family & Friends)

For the fifth week in a row, concerns about the health of friends and family dropped again slightly, with 75.0 percent expressing concern for the safety of their loved ones, down slightly from 77.3 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 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

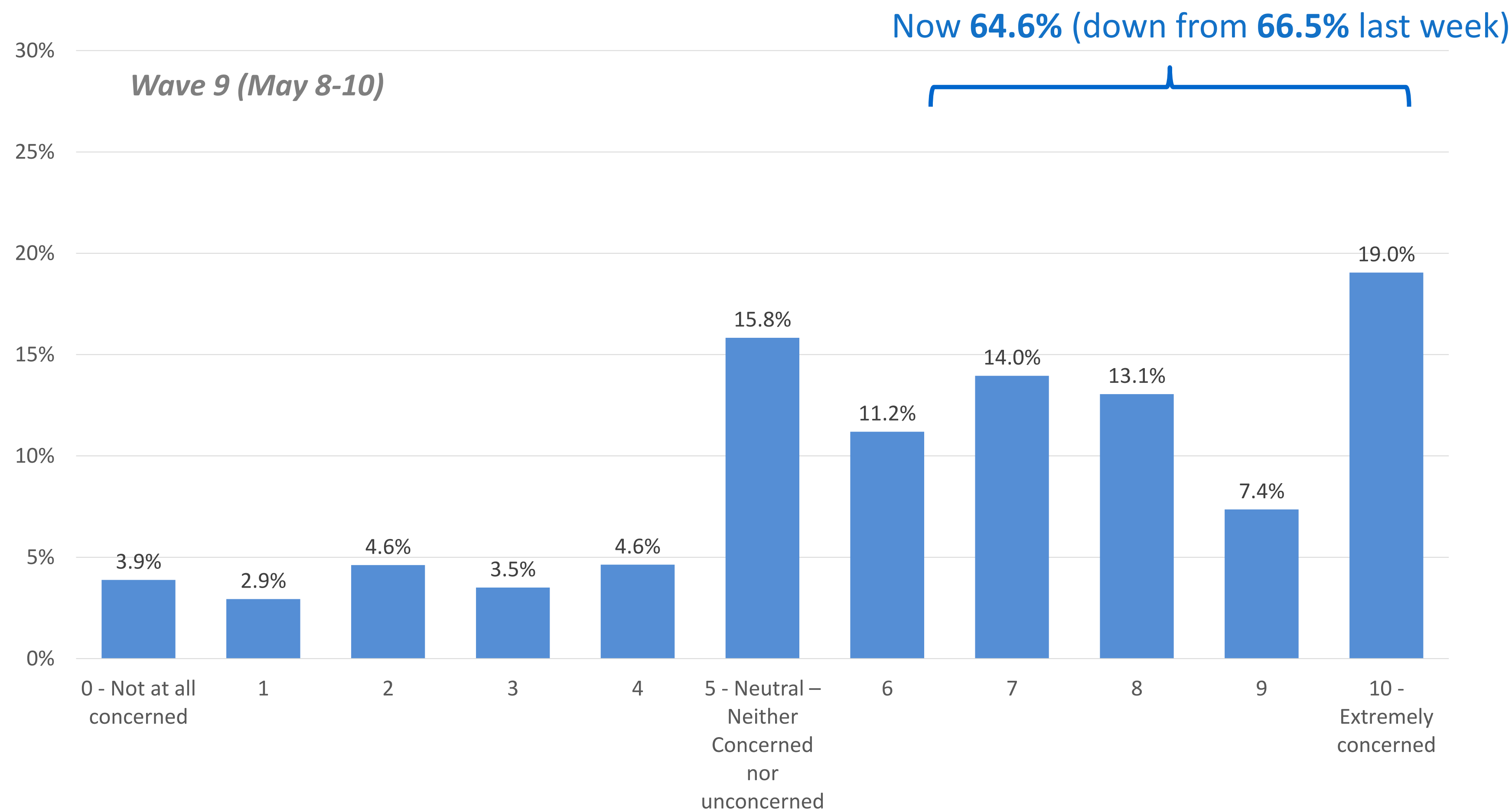


Concerns About Personal Finances

Concern that the pandemic will impact Americans' personal finances decreased this week, moving from 66.5 percent to 64.6 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 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

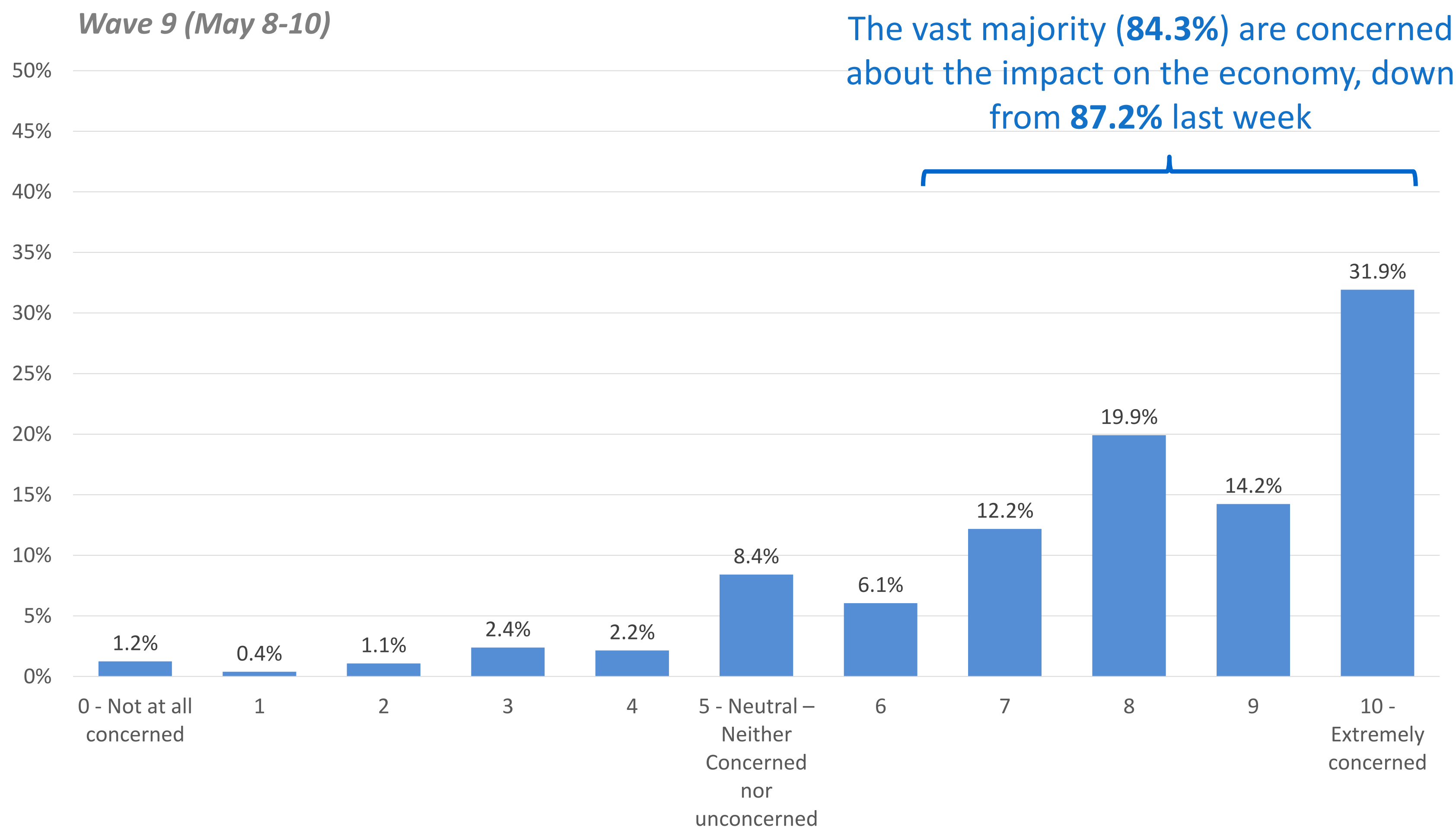


Concerns About National Economy

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 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

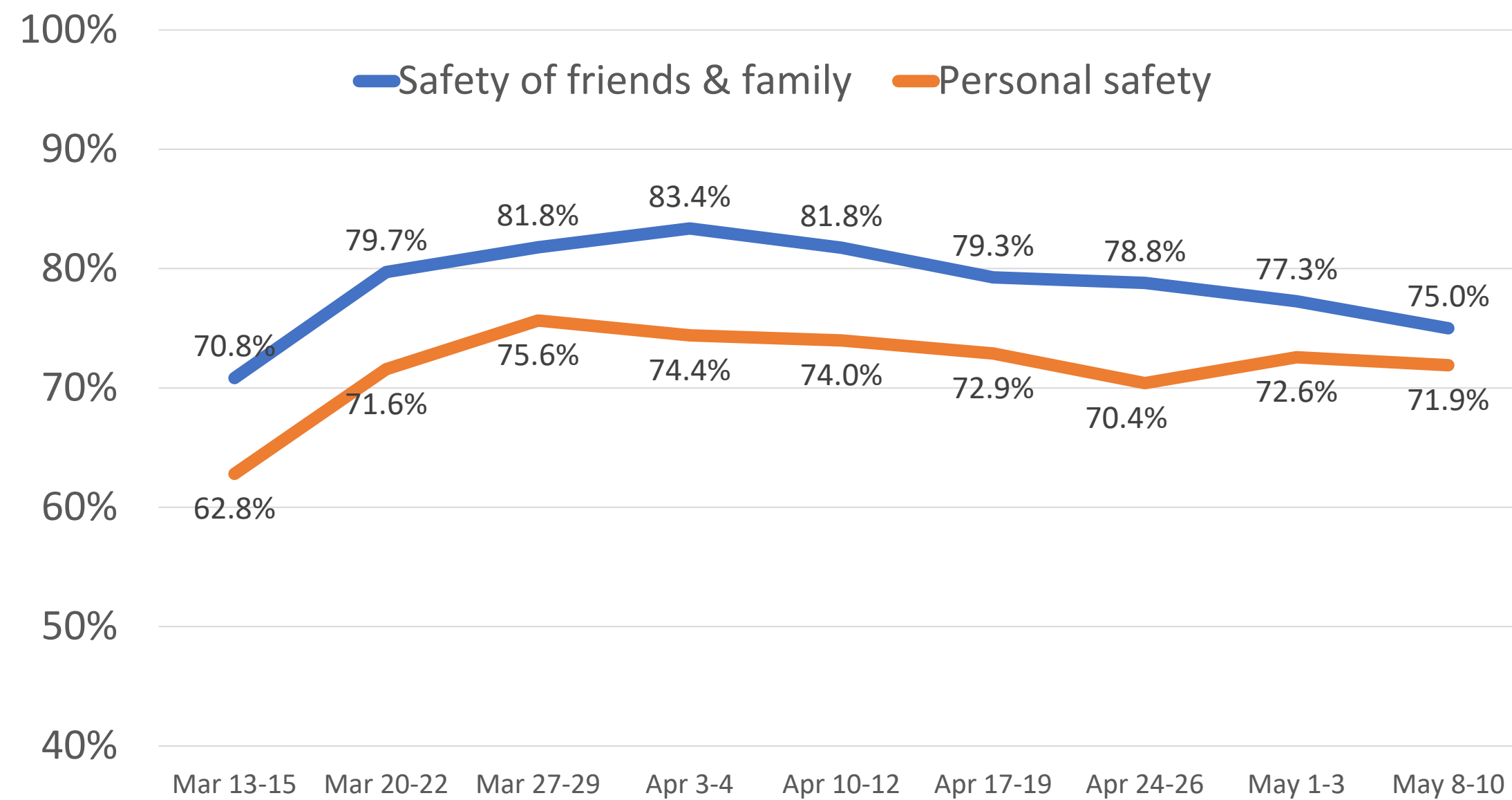


Summary: Personal vs. External Concerns

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

Safety Concerns

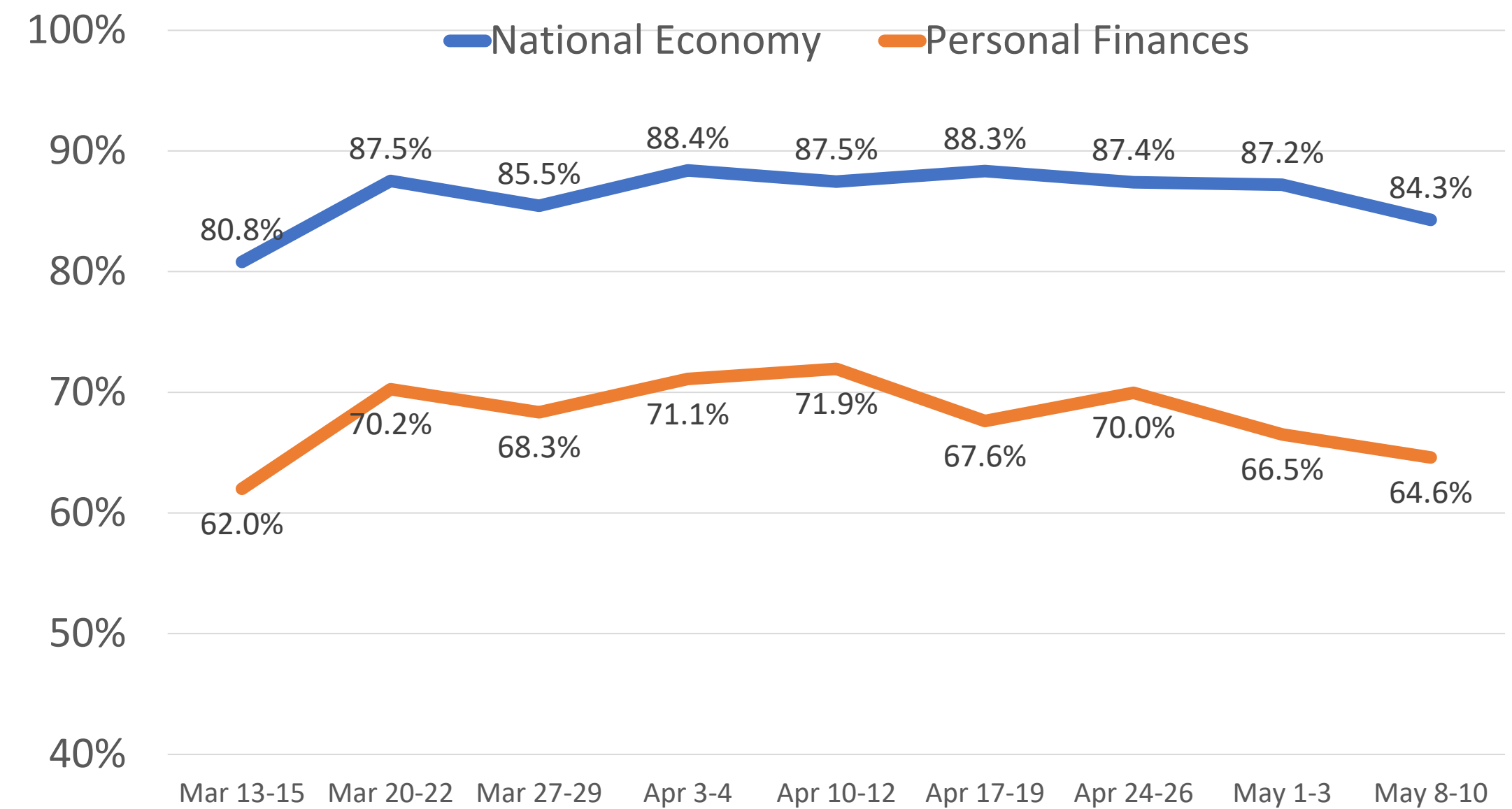
(% answering 10-6 on 11-point scale)



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?

Economic Concerns

(% 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? **Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?

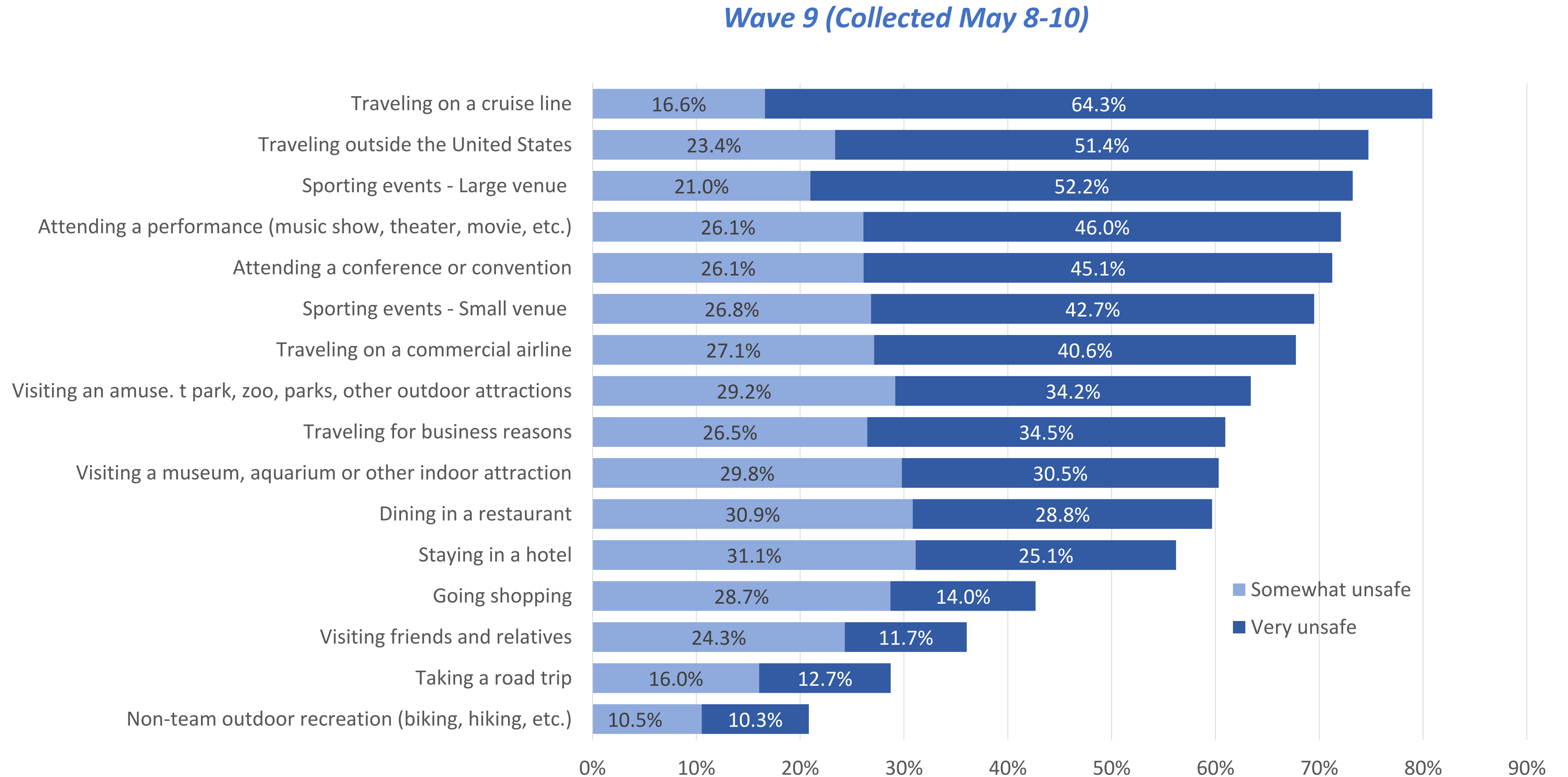
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

Perceived Safety of Travel Activities (Wave 9)

Cruises continue to be seen as the least safe travel activity. 80.9 percent of American travelers say that traveling on a cruise is either “Somewhat unsafe” or “Very unsafe.”

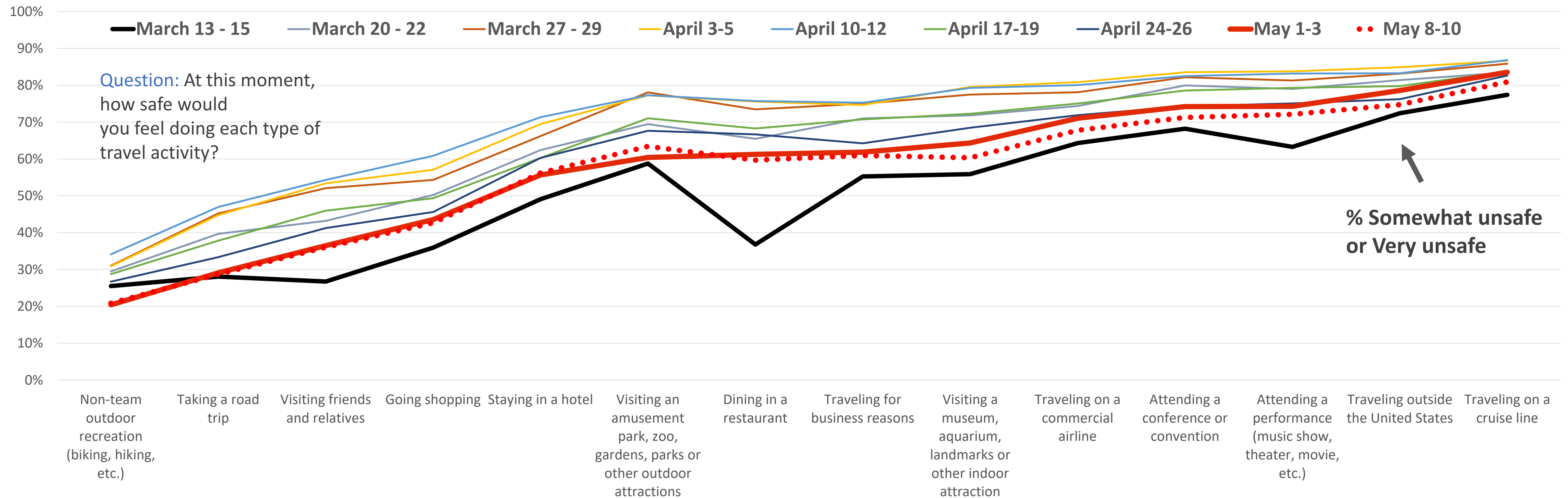
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)



Perceived Safety of Travel Activities (Waves 1-9 Comparison)

Traveler ratings of the safety of various travel activities improved again this week. In the ninth survey wave, the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe” decreased for most activities again.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 27--29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

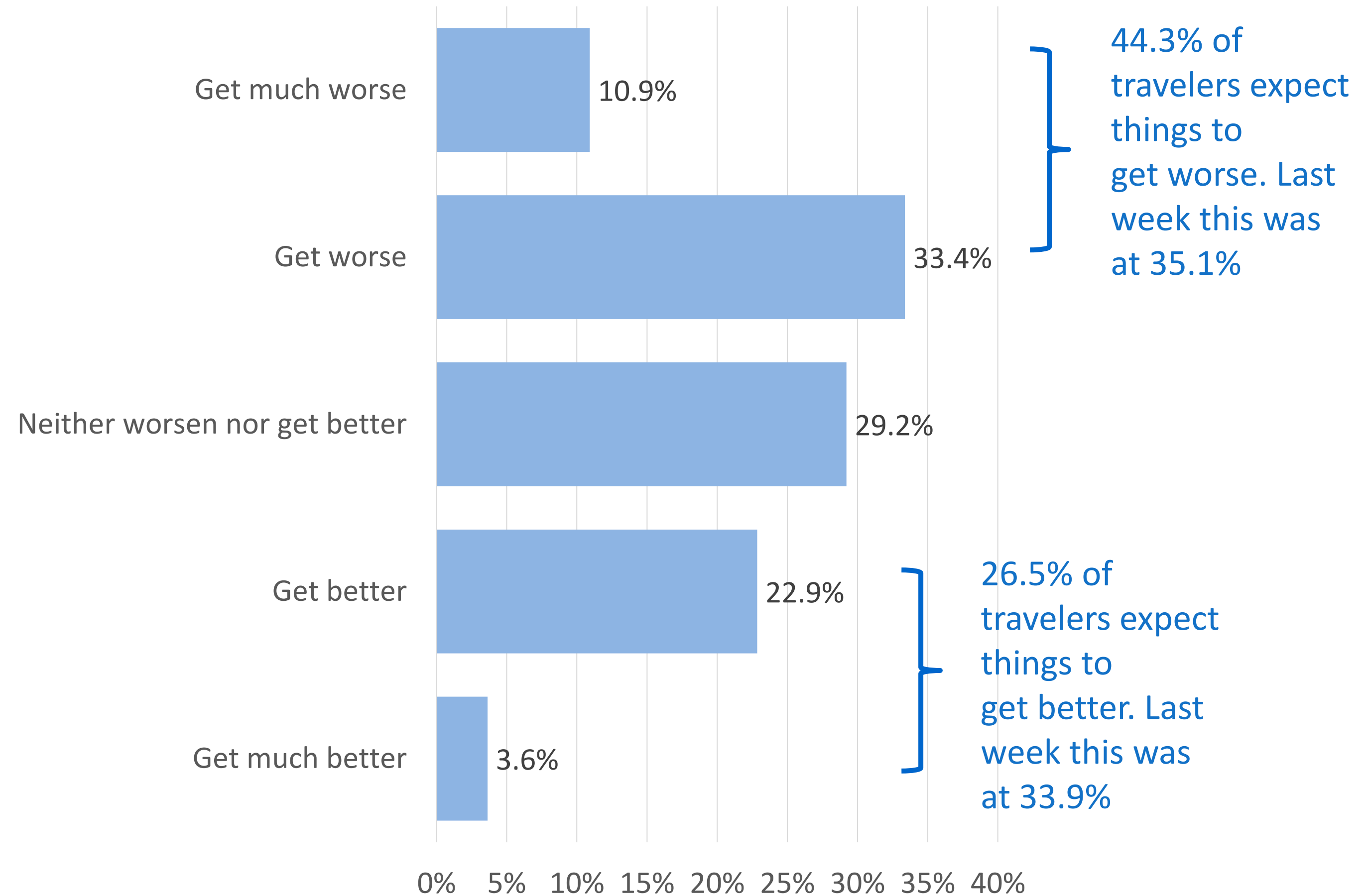
Expectations for the Coronavirus Outbreak

Optimism that the severity of pandemic will improve in the next month declined this week. Now 44.3 percent expect the coronavirus situation to get worse in the next month, up from 35.1 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 _____

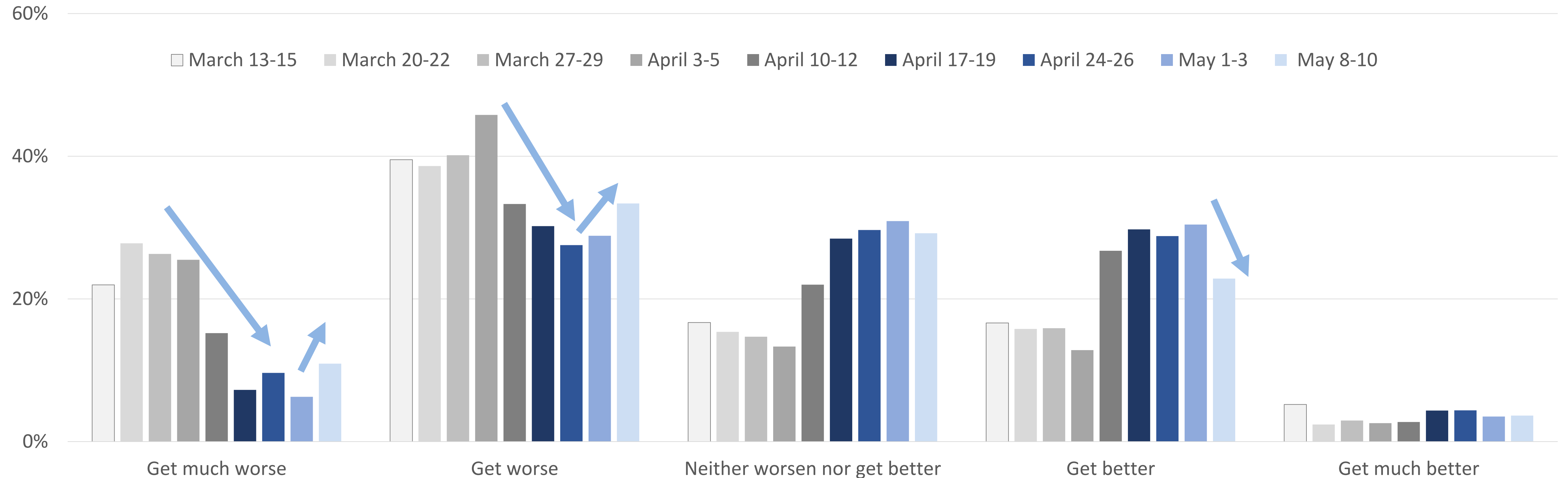
(Base: Wave 9 data. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)



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 _____

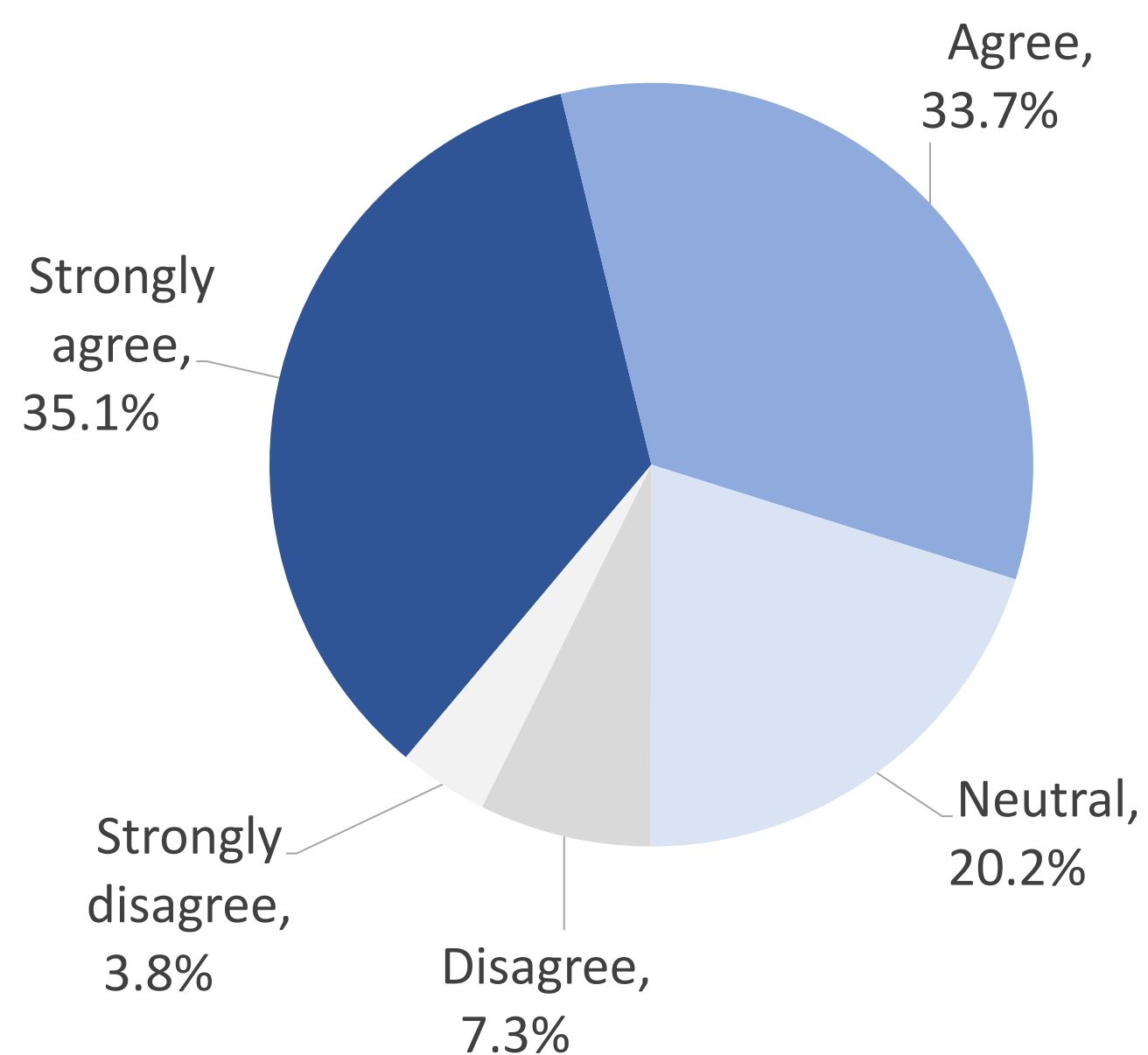


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

Excitement to Get Back to Travel

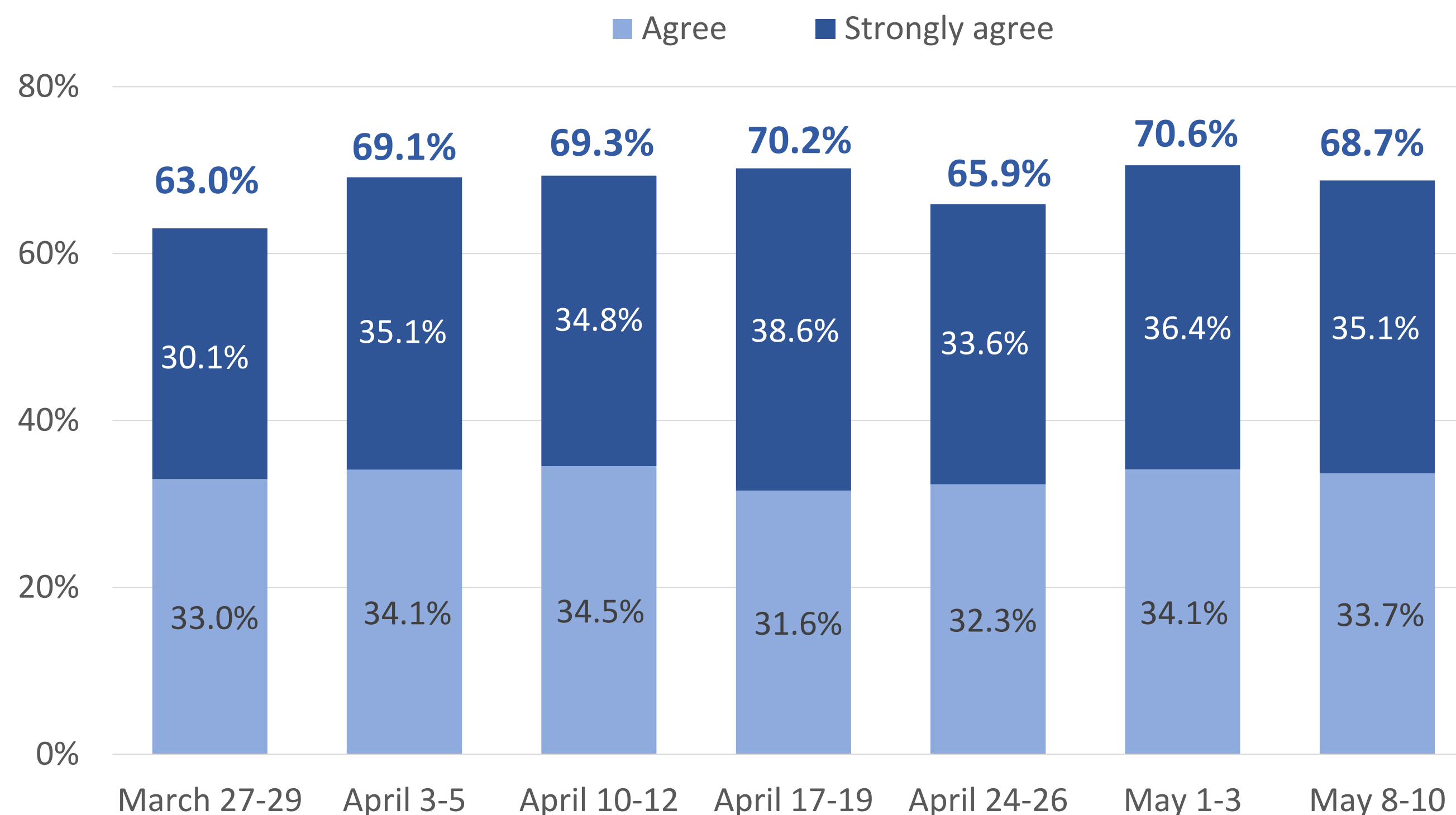
How much do you agree with the following statement?

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



(Base: All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

Overall excitement to get back out on the road decreased very slightly this week, as 68.7 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.



How Will They Get Back to Travel?

A visual-based survey question that was asked April 10-12 for the Week 5 survey wave was again asked this week. The question is presented below, with results 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

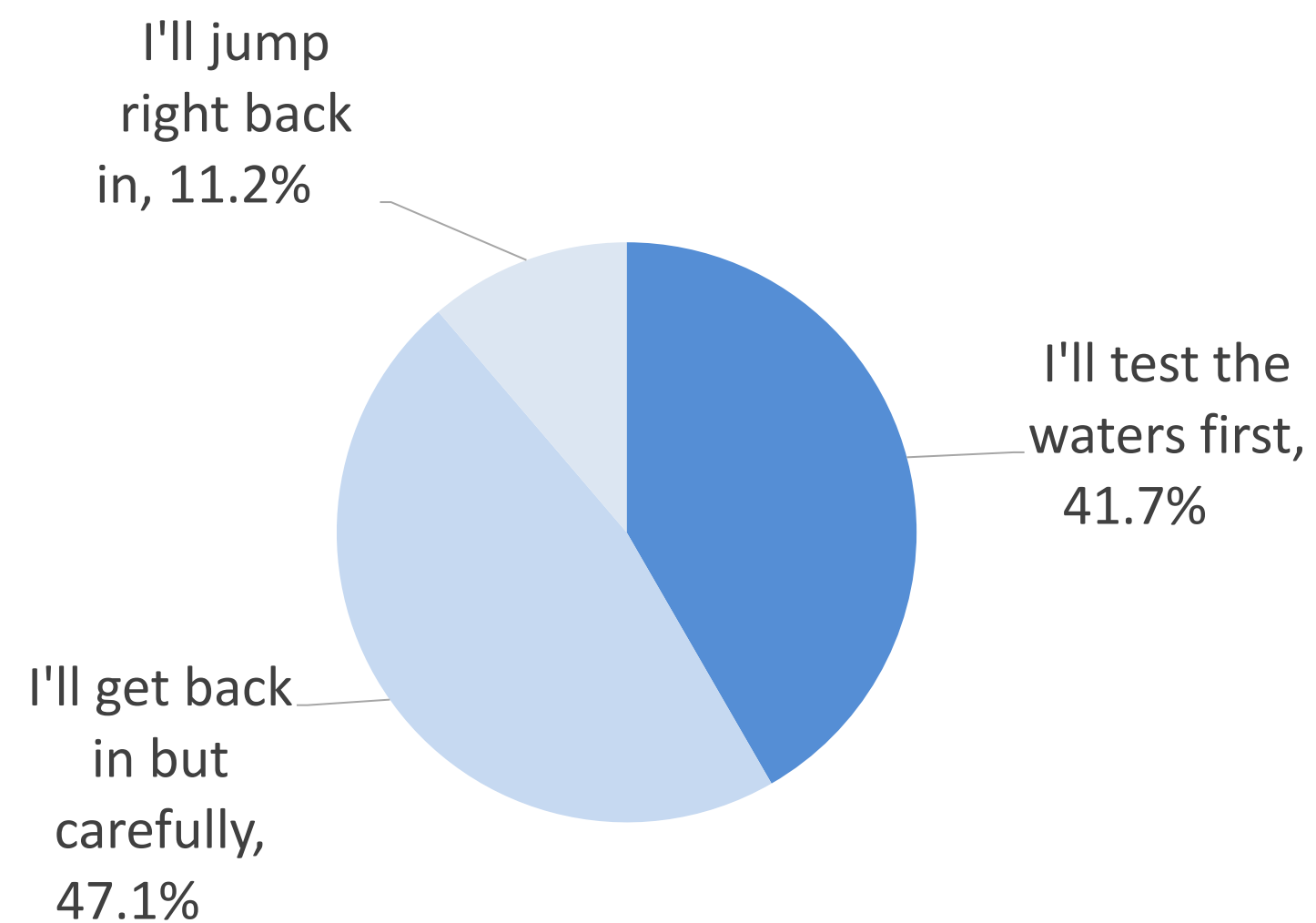


I'll jump right back in

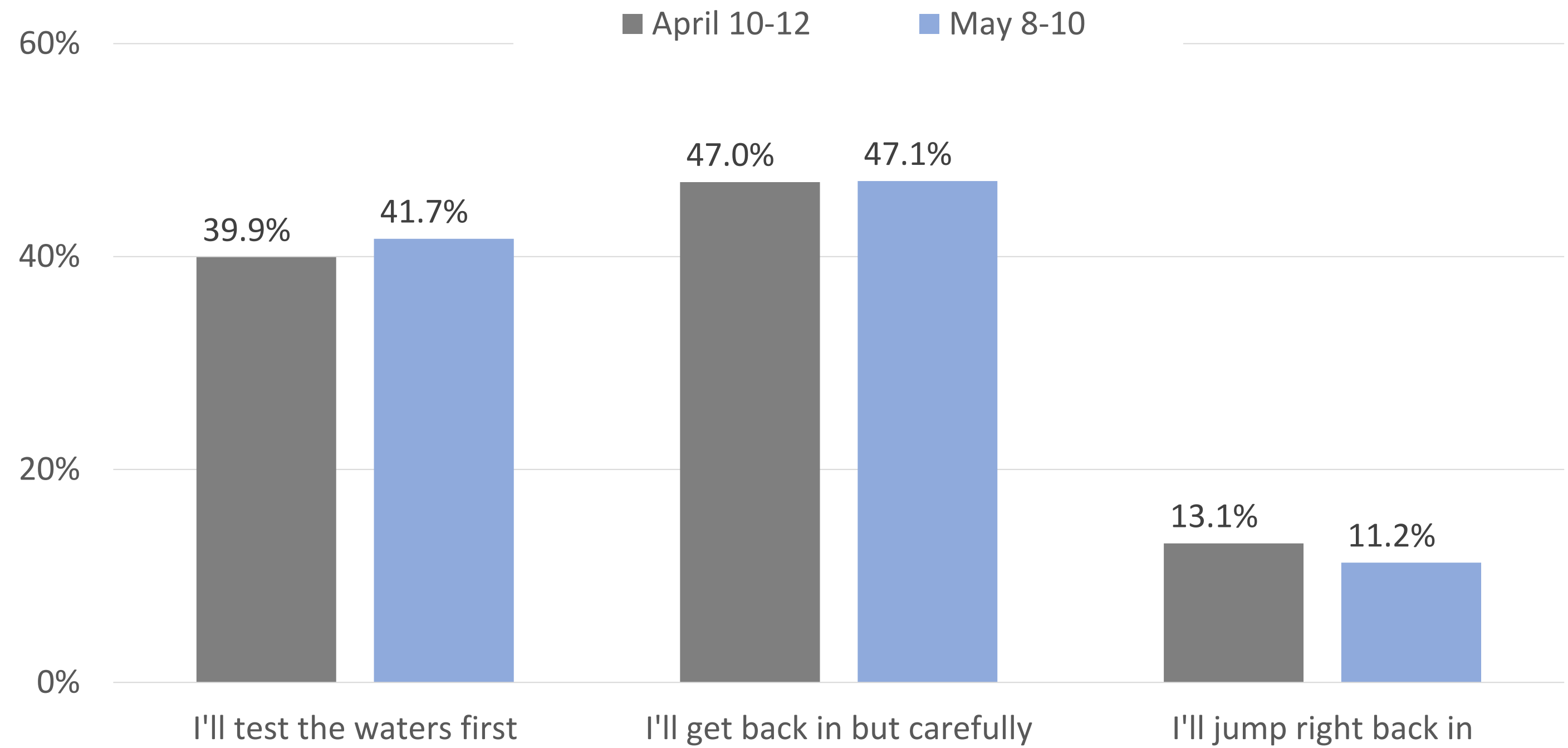
How Will They Get Back to Travel?

Unchanged from four weeks ago, relatively few American travelers expect to jump right back into traveling after the coronavirus situation abates. Just 1-in-10 say they will “jump right back in” while a vast majority will adopt 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, 1,200 completed surveys. Data collected May 8-10, 2020)



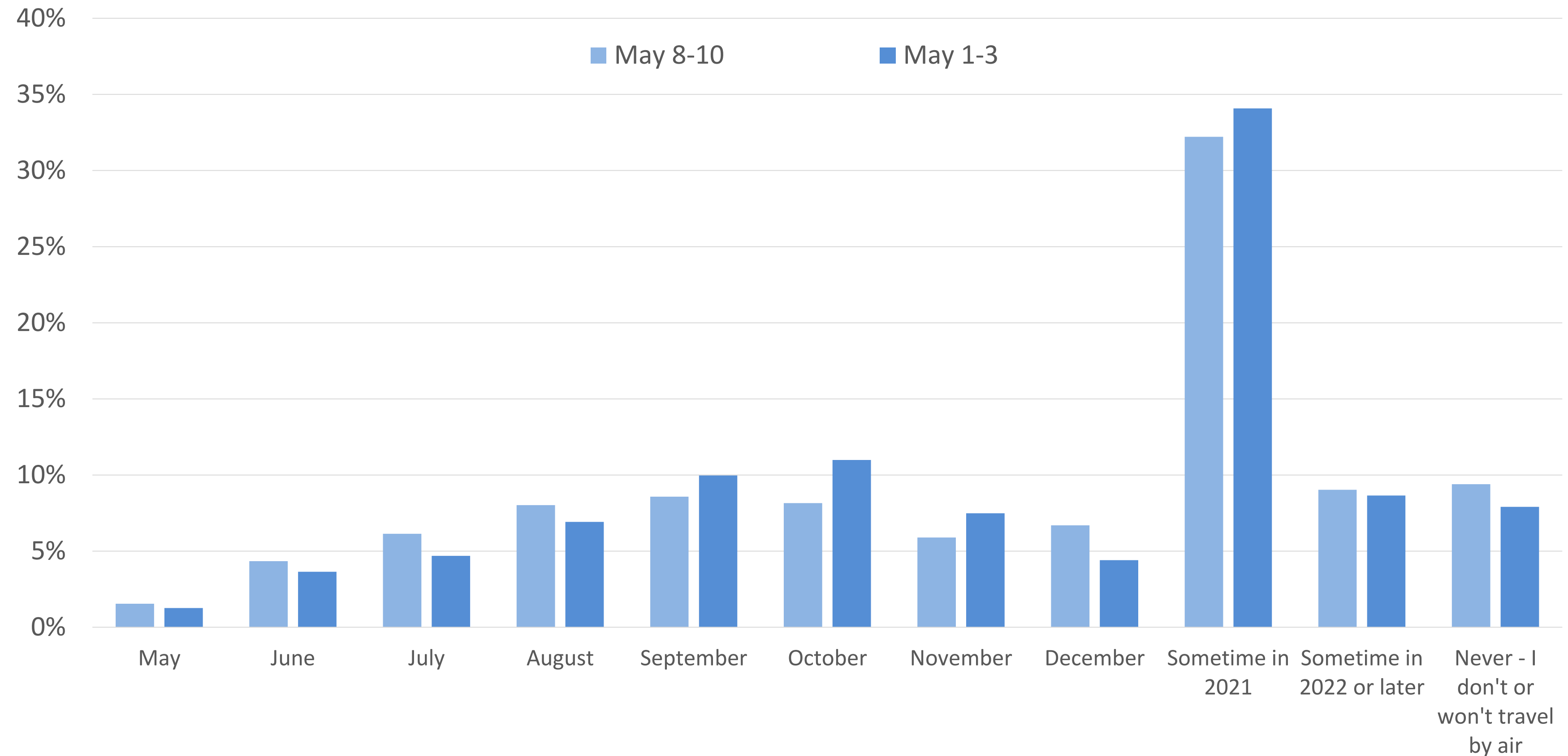
Month of Next Trip on a Commercial Airline

Most American travelers appear unlikely to take a trip by commercial air in 2020. Nearly a third (32.2%) said they expect to take their next commercial airline trip sometime next year.

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

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 8



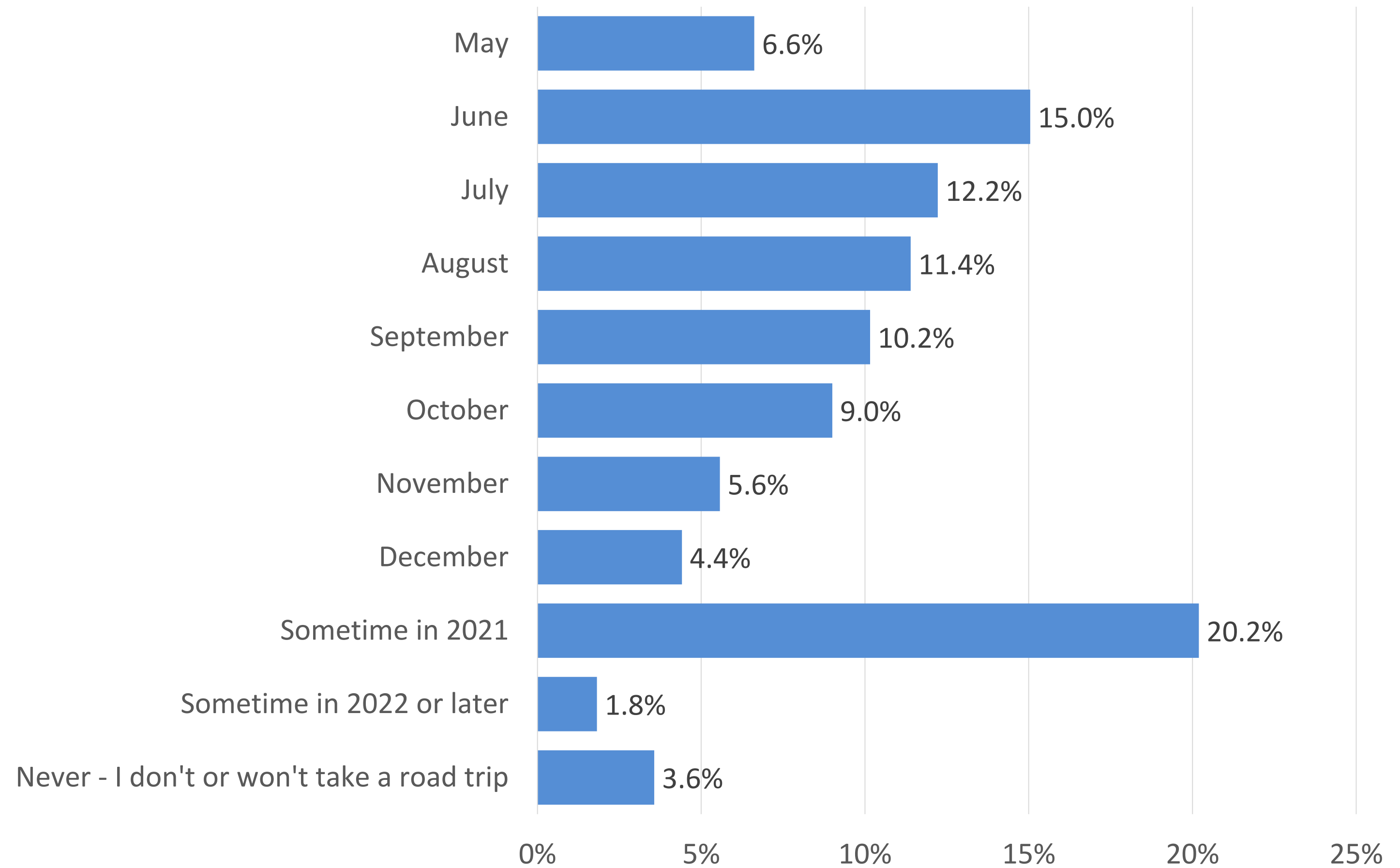
Month of Next Road Trip

While one-in-five travelers say they won't take their next road trip until 2021, over one-in-ten say they will take such a trip this summer.

Question: In what month do you expect you will take your NEXT ROAD TRIP (traveling in a personal automobile)?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



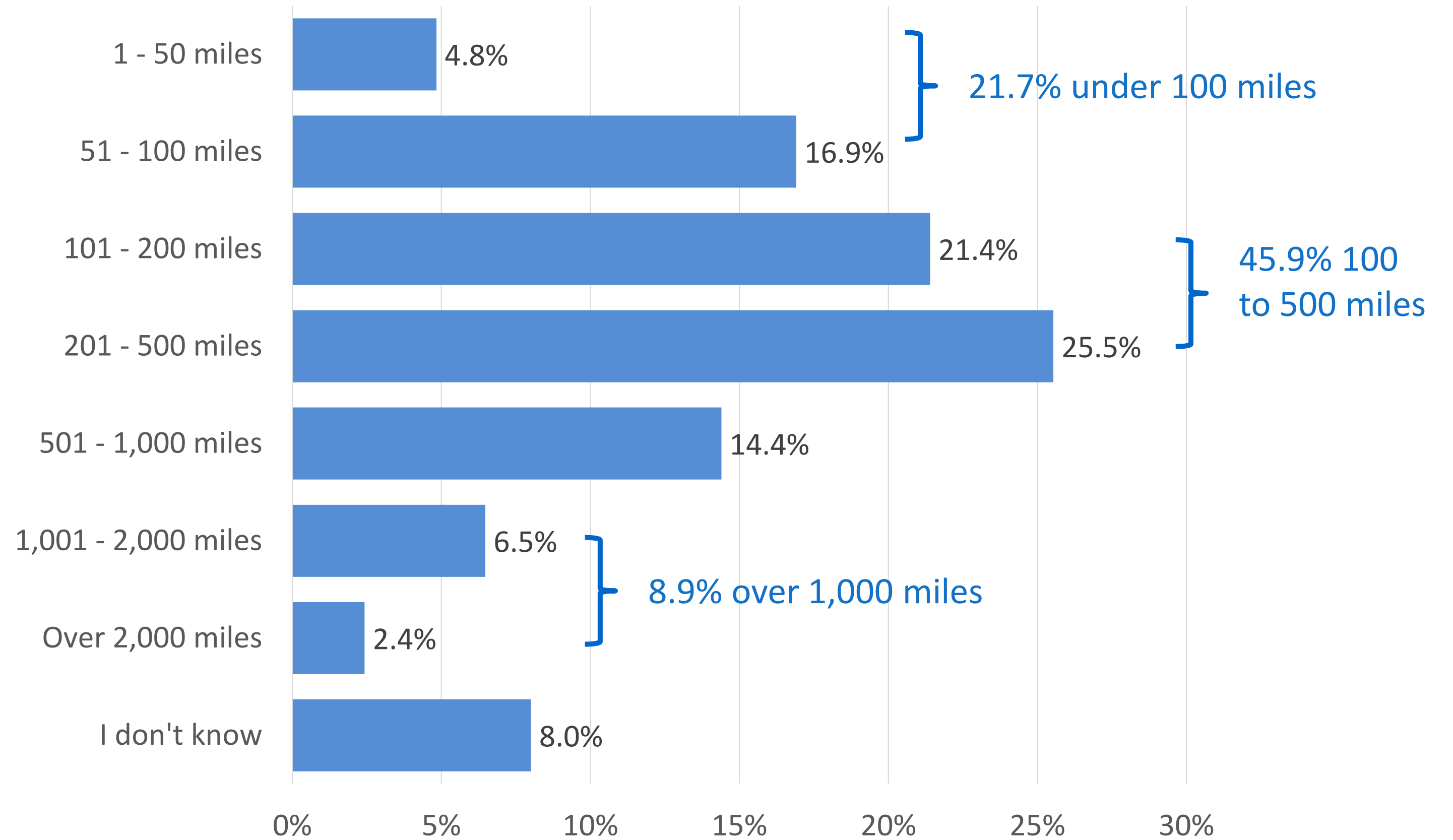
Distance from Home on Next Road Trip

The vast majority of “next” road trips are expected to be a distance less than 500 miles from home. 3-in-4 travelers say they will travel within this distance from home on their next road trip.

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

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Things Travelers Miss

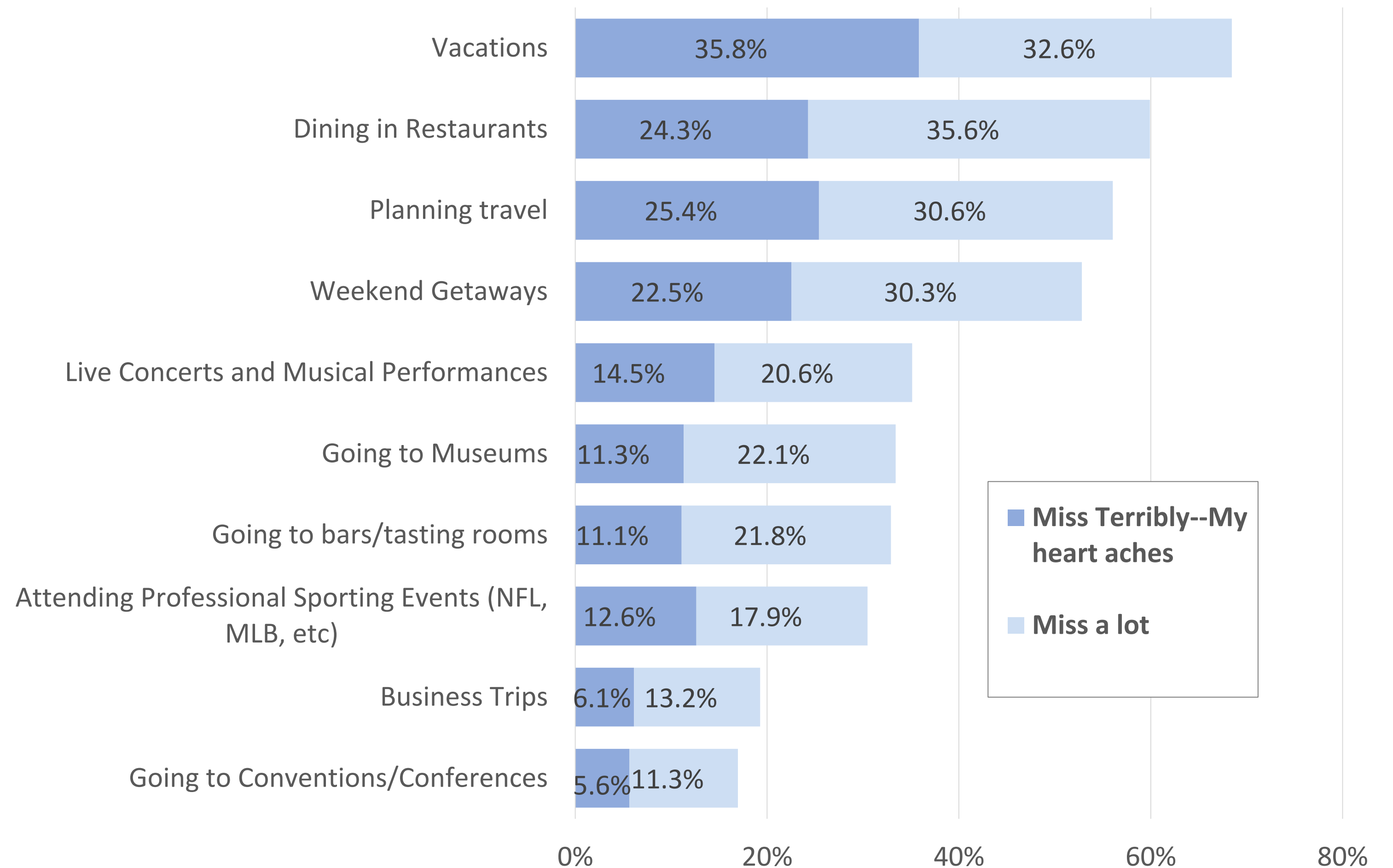
Given a list of things many travelers have not been able to enjoy since the pandemic, vacations emerged as the most missed activity.

More than 2-in-3 travelers said they missed vacations “terribly” or “a lot.”

Question: How much do you miss the following?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Emotional Reactions to Pandemic Mitigation Activity

A question was added to this week's survey to see how travelers felt they would react emotionally to three situations where service staff were acting as a result of the pandemic.

Question: Imagine your first reaction if you ran into the following three situations--represented by the images below. Would seeing this create any feeling of anxiety? (Select ONE to fill in the blank for each picture)

Seeing this would likely make me feel _____

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Servers in a restaurant wearing masks



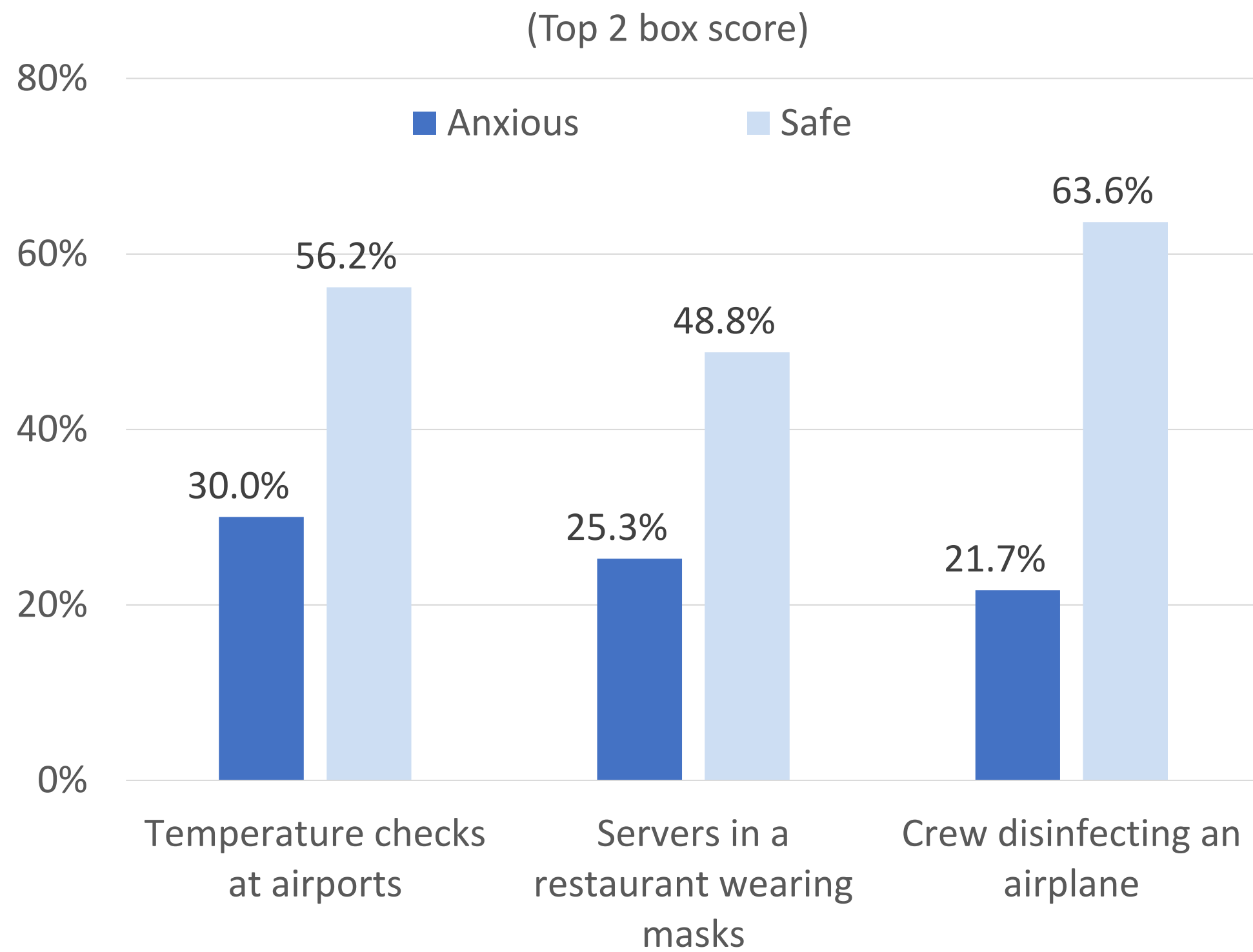
Temperature checks at airports



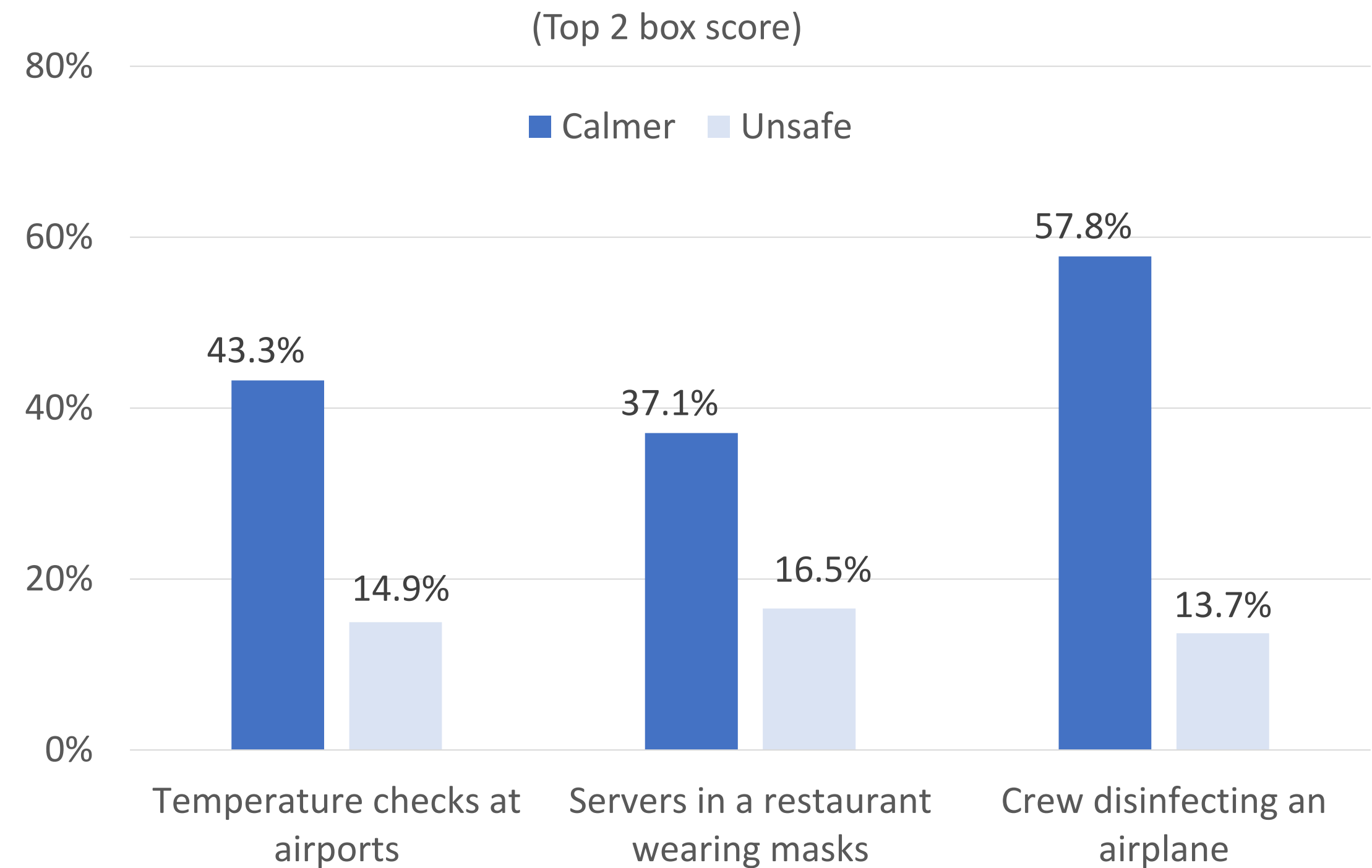
Crew disinfecting an airplane

Emotional Reactions to Pandemic Mitigation Activity

For all three scenarios, travelers would be more likely to have a first reaction of feeling safe, rather than anxious.



Travelers would be much more likely to say each situation would calm them than make them anxious. The greatest calming effect would come from crews disinfecting their planes.



Reaction to State Safety Guidelines

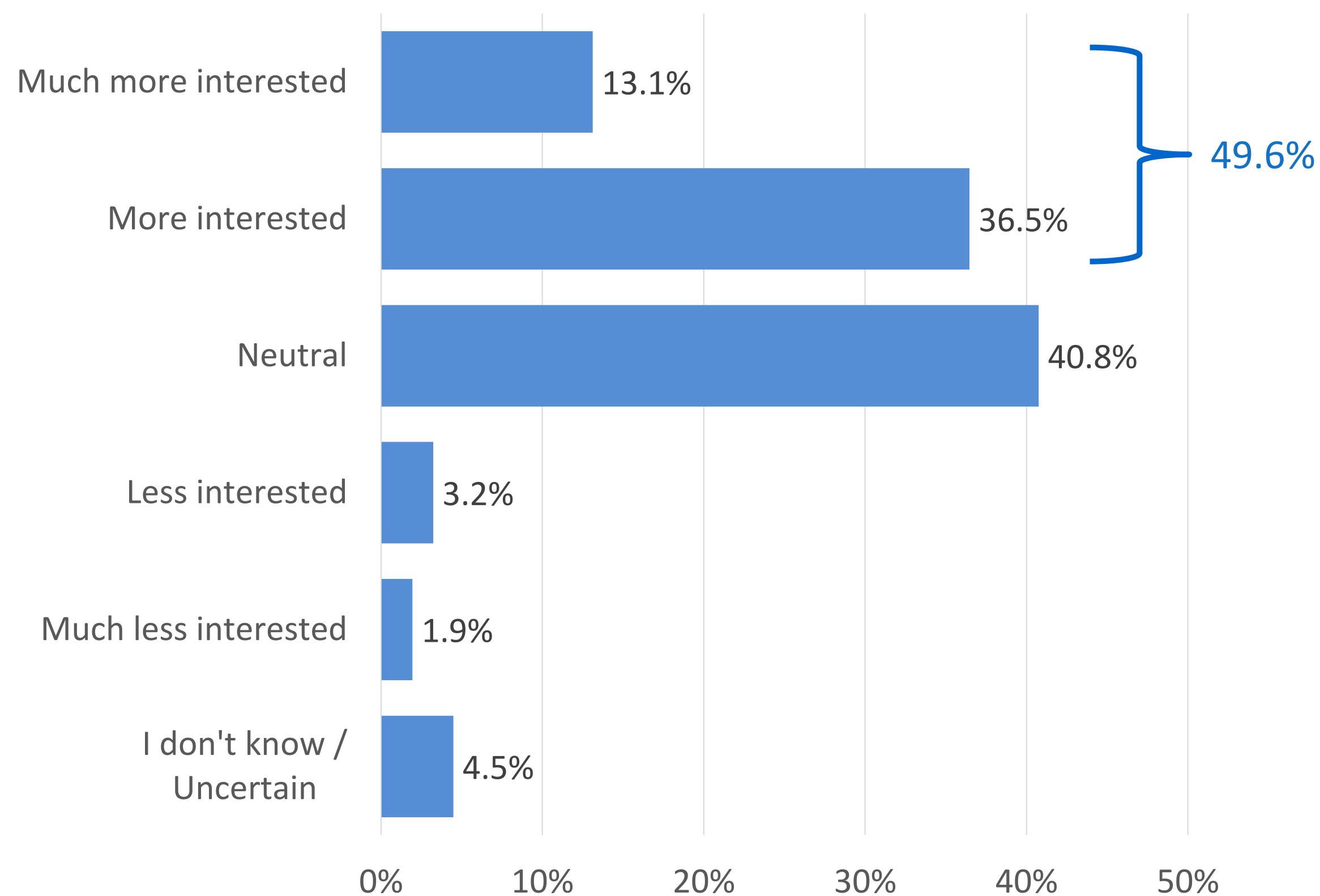
Approximately half (49.6%) of travelers say that a restaurant stating they follow state government guidelines to prevent the transmission of the coronavirus would make them more interested in visiting the restaurant.

Question: All else equal, if a business such as a hotel, attraction or restaurant stated that they follow health & safety guidelines to prevent the transmission of viruses issued by their state government, how would that affect your interest in visiting?

I would be _____

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9





**Section II:
Advertising in the
Covid-19 World**

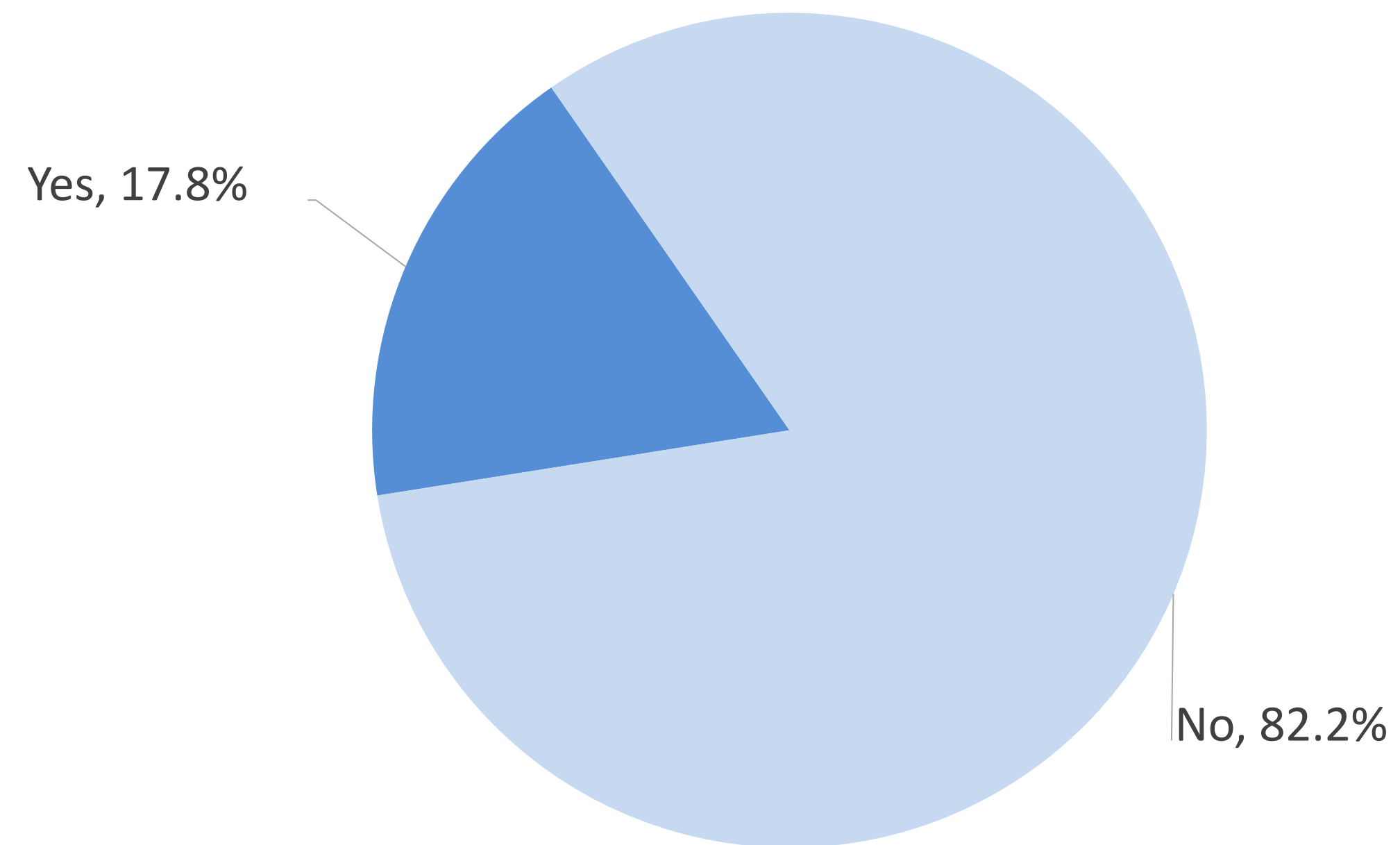
Recall of Destination Advertising

Just under 1-in-5 travelers (17.8%) recall having seen a destination advertisement at some point in the past month.

Question: Do you recall seeing any specific advertisements for any travel destinations in the past month?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



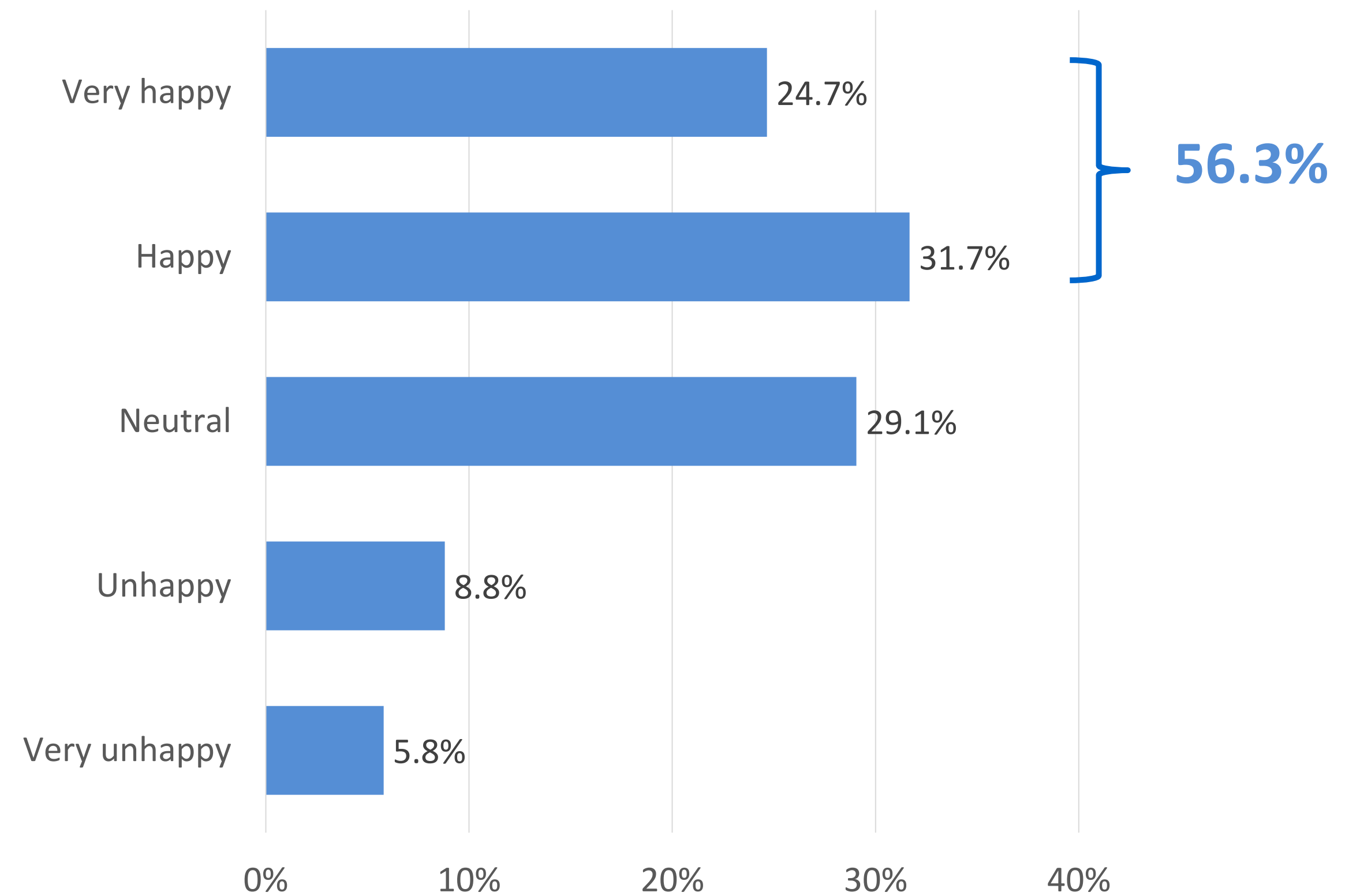
Feelings About Most Recent Advertisement Seen

Despite low overall recall, most travelers appear to be enjoying the destination ads that they do recall. Fully 56.3 percent of travelers say the last destination ad they saw made them feel happy or very happy.

Question: Please think about the most recent travel destination advertisement you saw. In general, how did that advertisement make you feel?

(Base: Respondents who recalled a travel ad in the past month, 192 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Receptivity to Advertising Channels

Travelers report that the channels they would be most receptive to being pitched by destinations are websites and email campaigns.

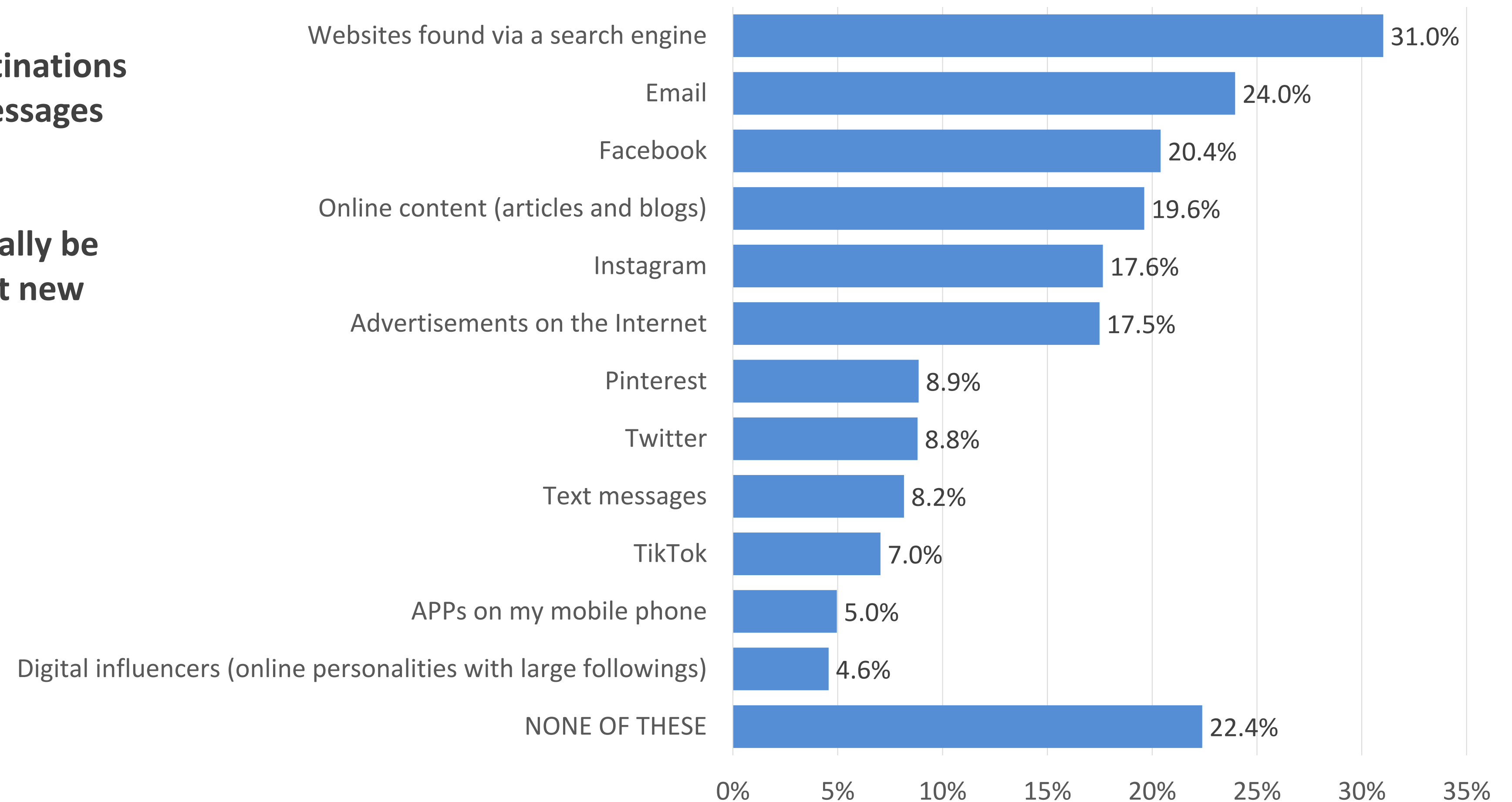
Suggesting these more traditional approaches shouldn't be neglected in these challenging times.

Please think about how travel destinations could best reach you with their messages right now.

Question: Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



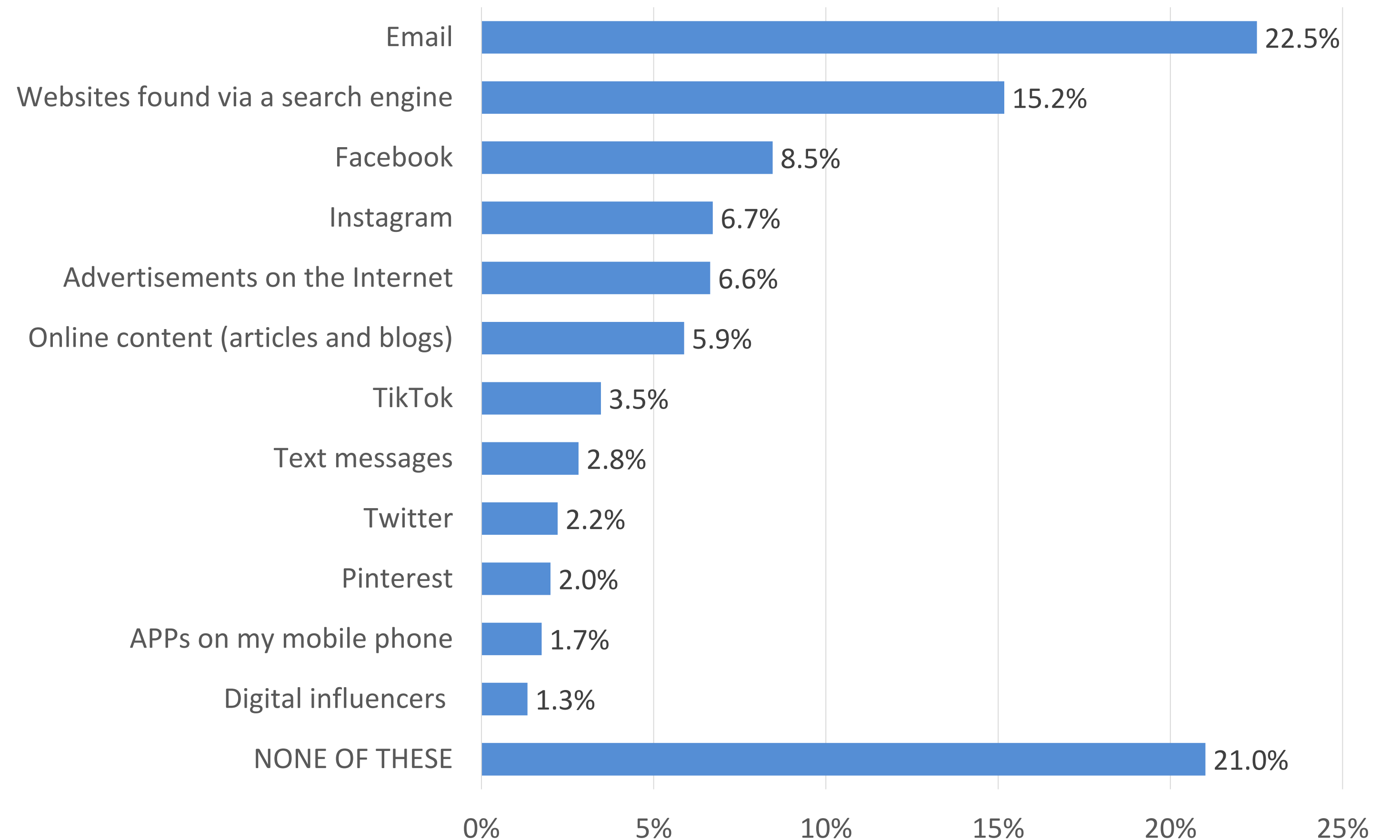
Single Best Way to Reach Travelers

When asked what the single best way to reach travelers was, the most frequently selected response was email.

Question: Which would be the SINGLE BEST WAY a travel destination could reach you right now? (Select one)

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Preferred Tone of Advertising Messaging

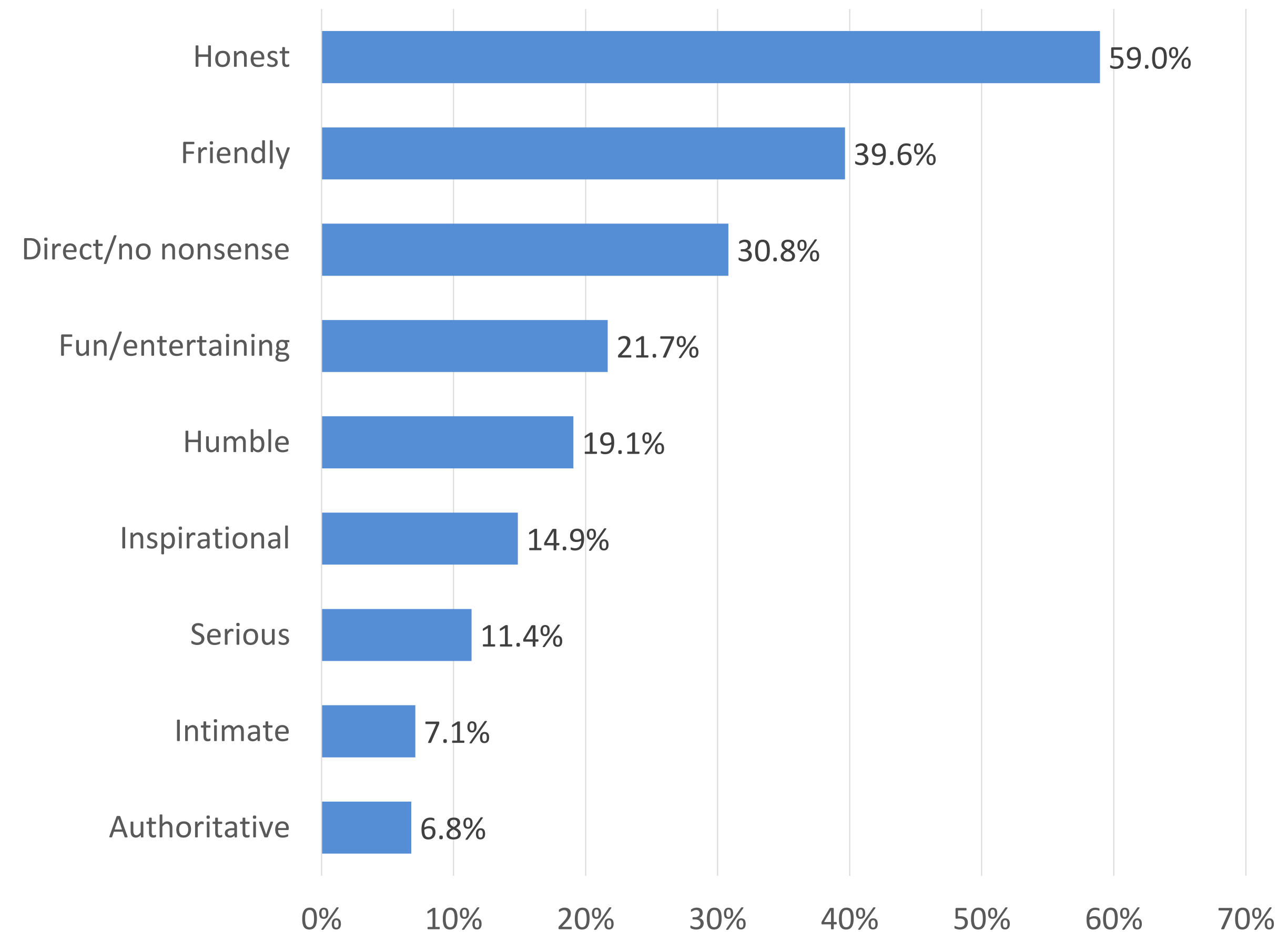
How do travelers want to be spoken to in this environment? With a tone of honesty. Presented a list of potential tones, travelers were asked how they would most want a destination to speak to them. An honest, friendly, no-nonsense approach appears to be favored.

Think about advertisements for travel destinations.

Question: How you would like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



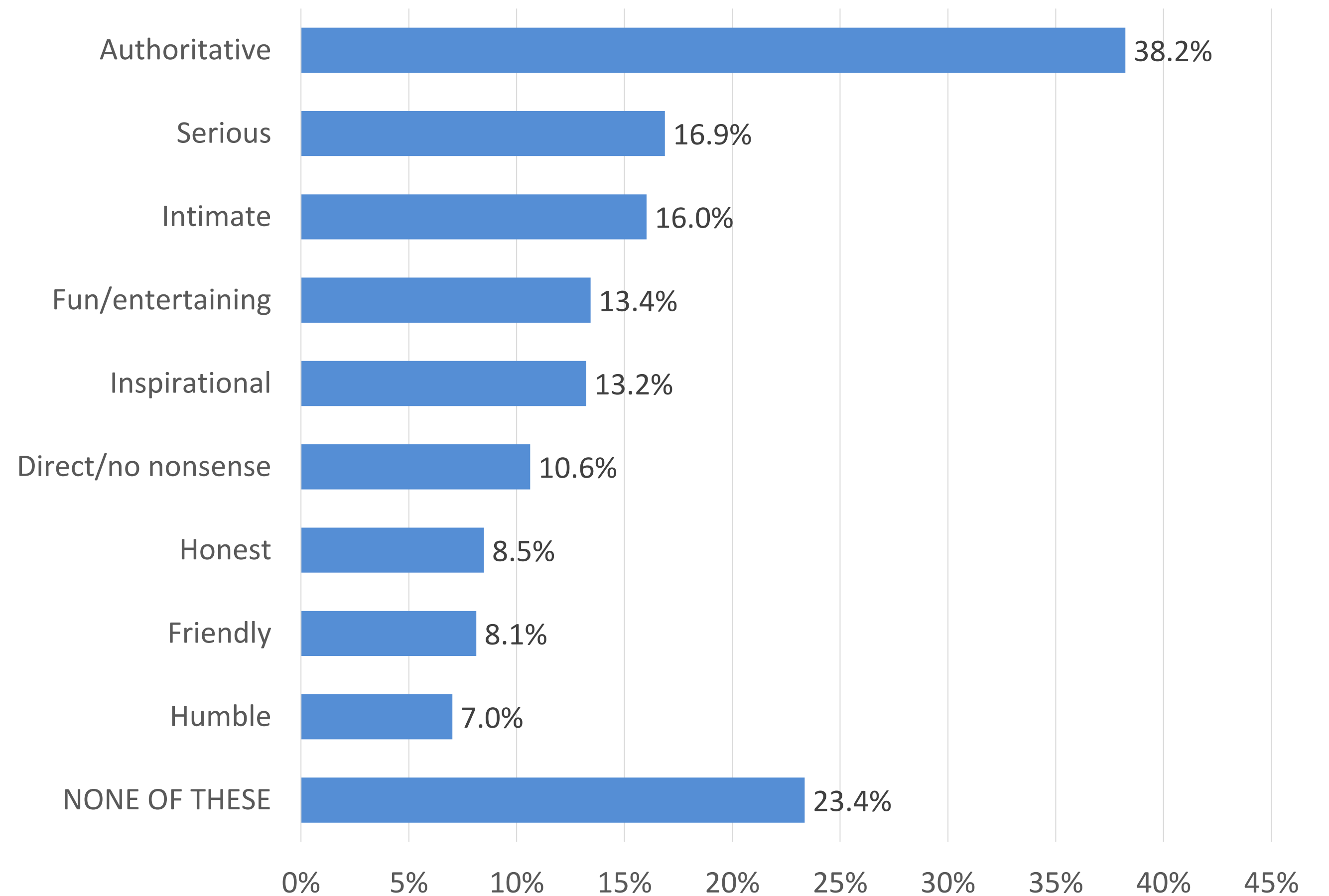
Turn-offs

Authoritative and serious tones were reported to be the biggest turn-offs. An interesting finding in this current climate of uncertainty.

Question: Would any of these tones (if used by a travel destination) turn you off? (Select any that apply)

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



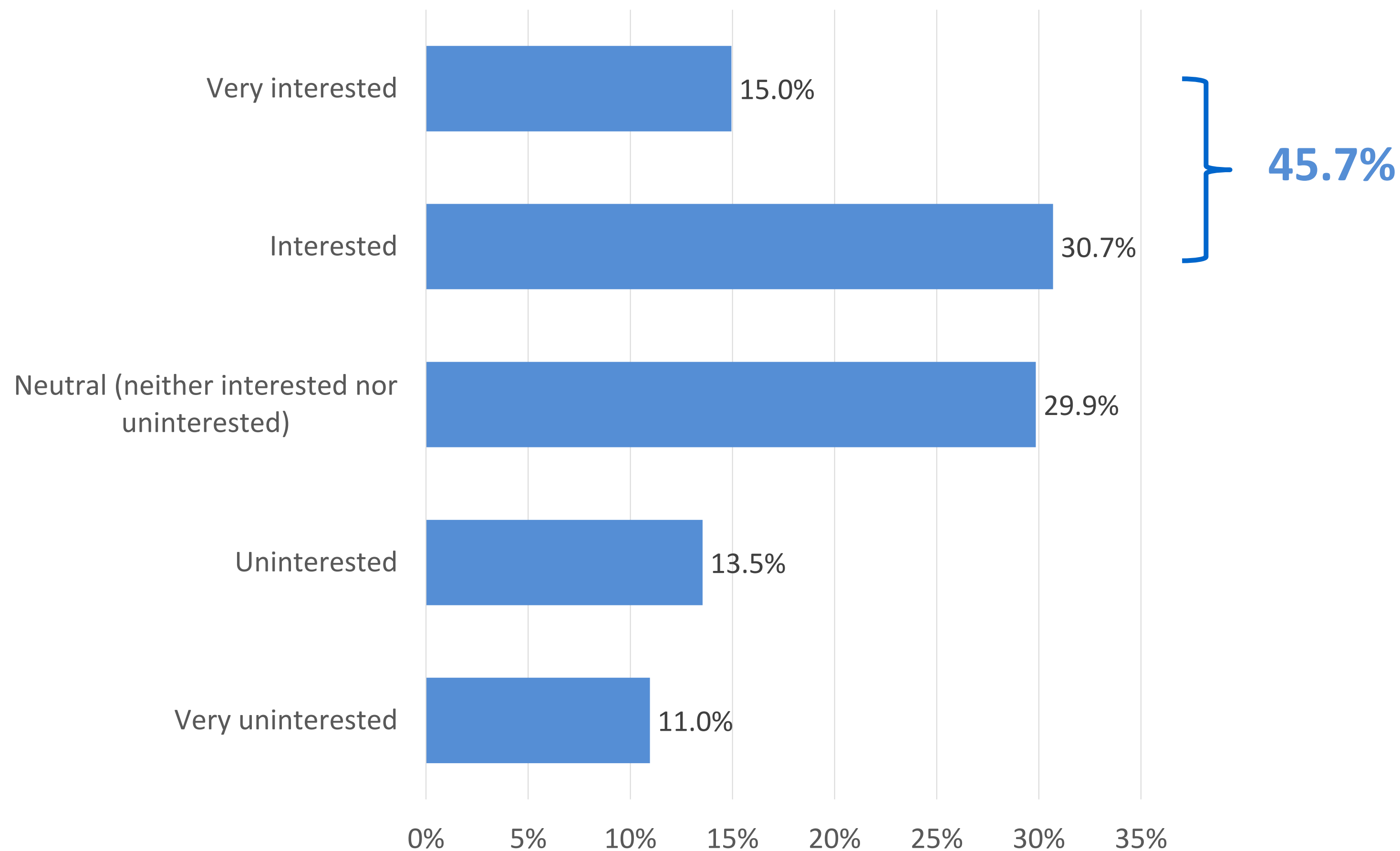
Interest in Virtual Destination Tours

About half of travelers expressed an interest in watching virtual tours of travel destinations.

Question: How interested would you be in taking virtual tours of travel destinations online?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



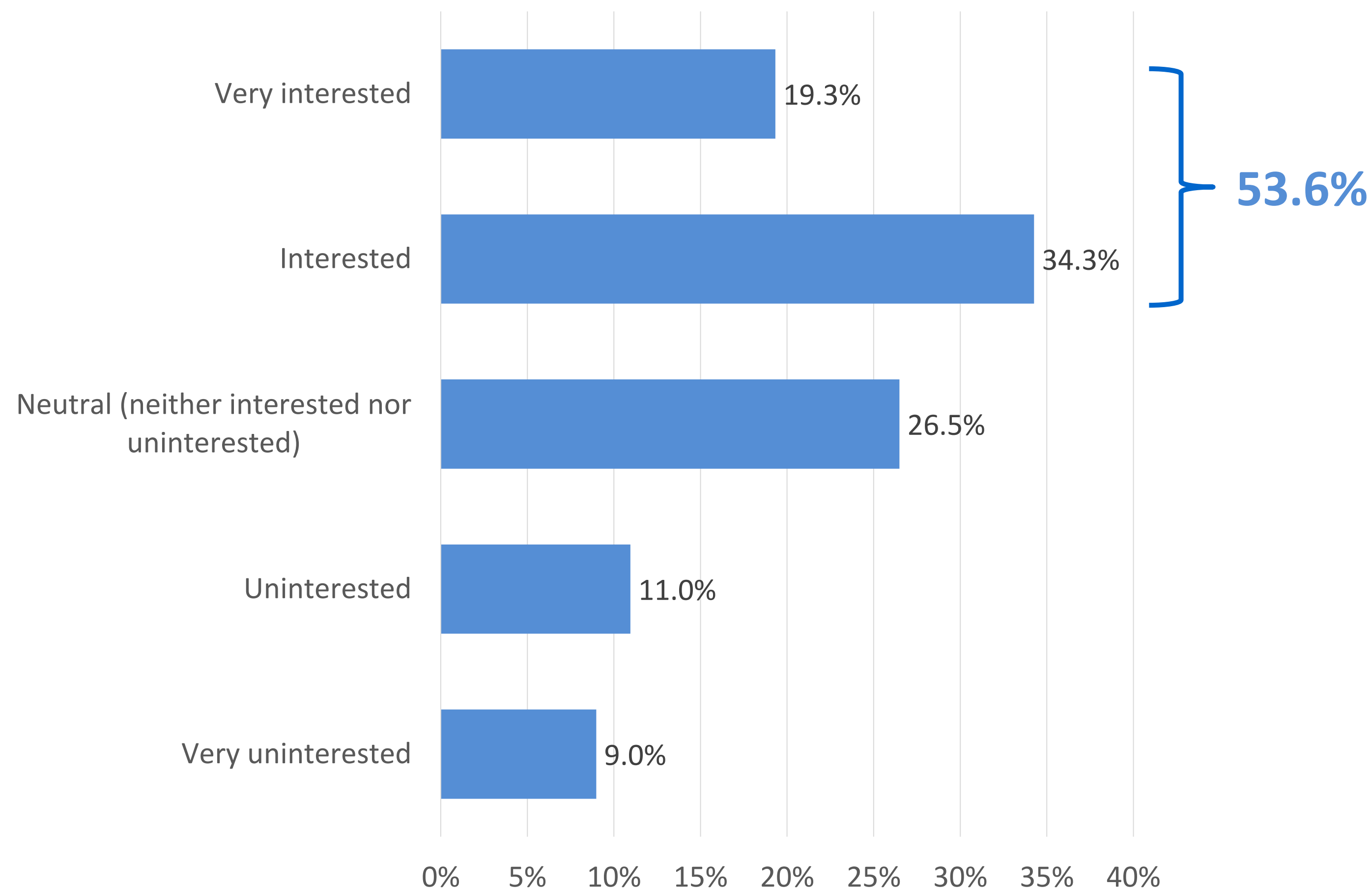
Interest in Virtual Hotel Tours

Slightly more popular, virtual tours of hotels were seen as interesting by 53.6 percent of travelers.

Question: How interested would you be in taking virtual tours of a hotel you are considering?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Interest in Online Watch Parties

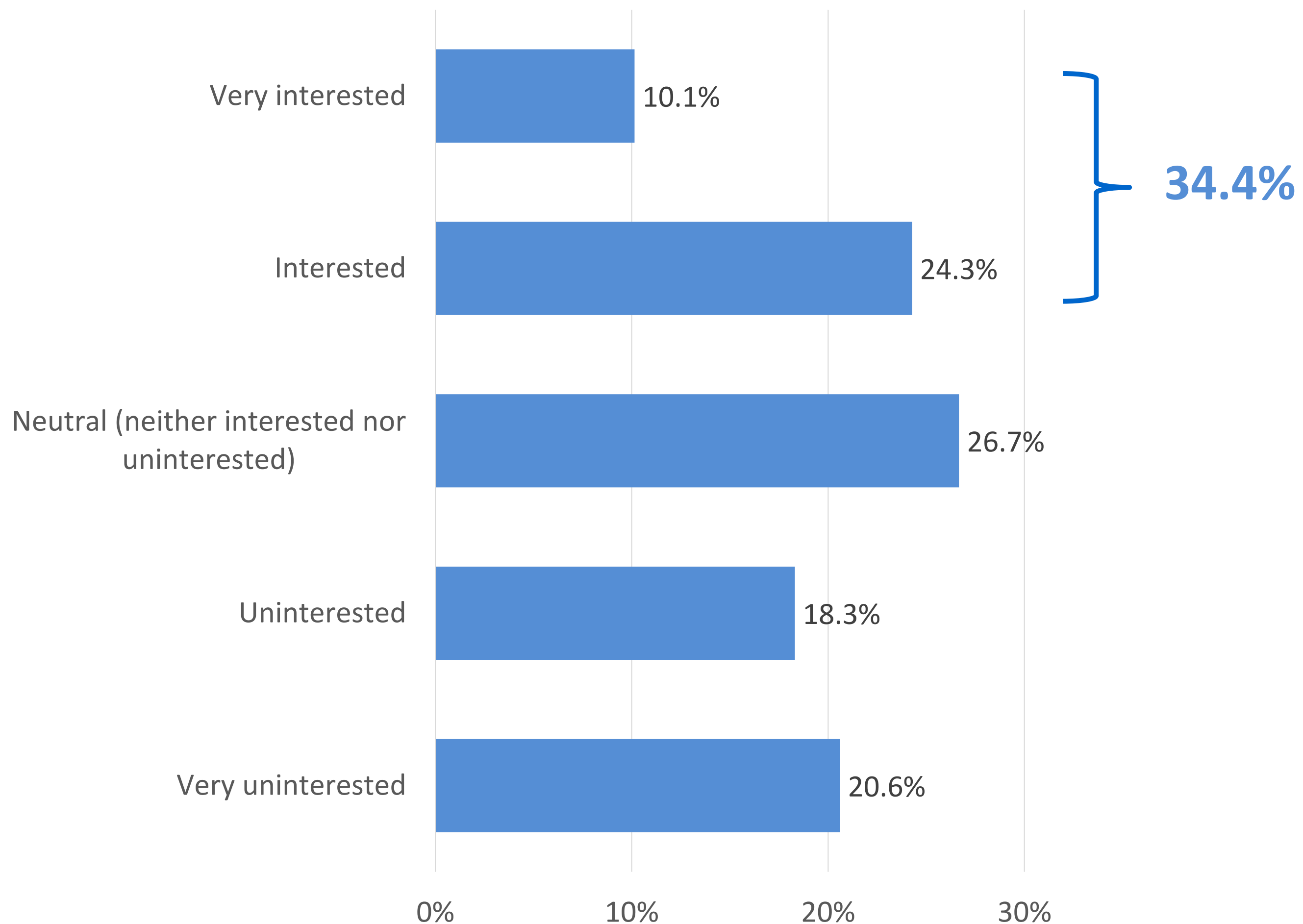
About 1-in-3 travelers said they would be interested in joining online destination watch parties, if they had the time and found the destination appealing.

Imagine you are on a social media channel and not feeling particularly busy.

Question: How interested would you be in joining an ONLINE WATCH PARTY to see something happening in a destination you find appealing?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



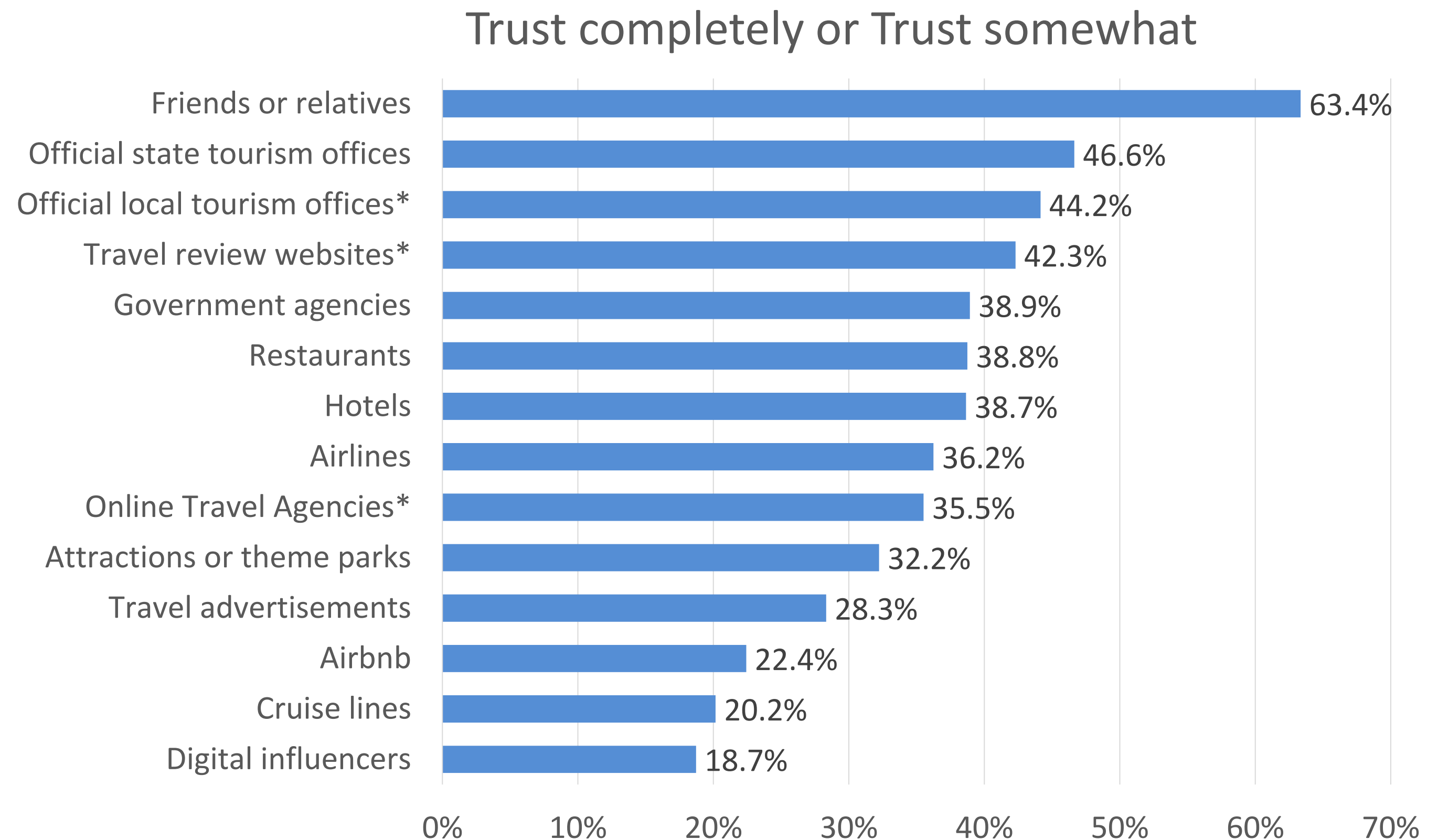
Planning Resources & Trust

DMOs appear to be the most widely trusted resource amongst travelers at the moment. Nearly 1-in-2 travelers said state or local tourism offices were somewhat trusted or trusted completely to provide information about travel safety.


Question: Thinking about planning your travel in the next **TWELVE (12) MONTHS**, how much would you trust each of the following to provide you with the information you need to travel safely?

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



**Concept explained to respondents in the survey questionnaire*



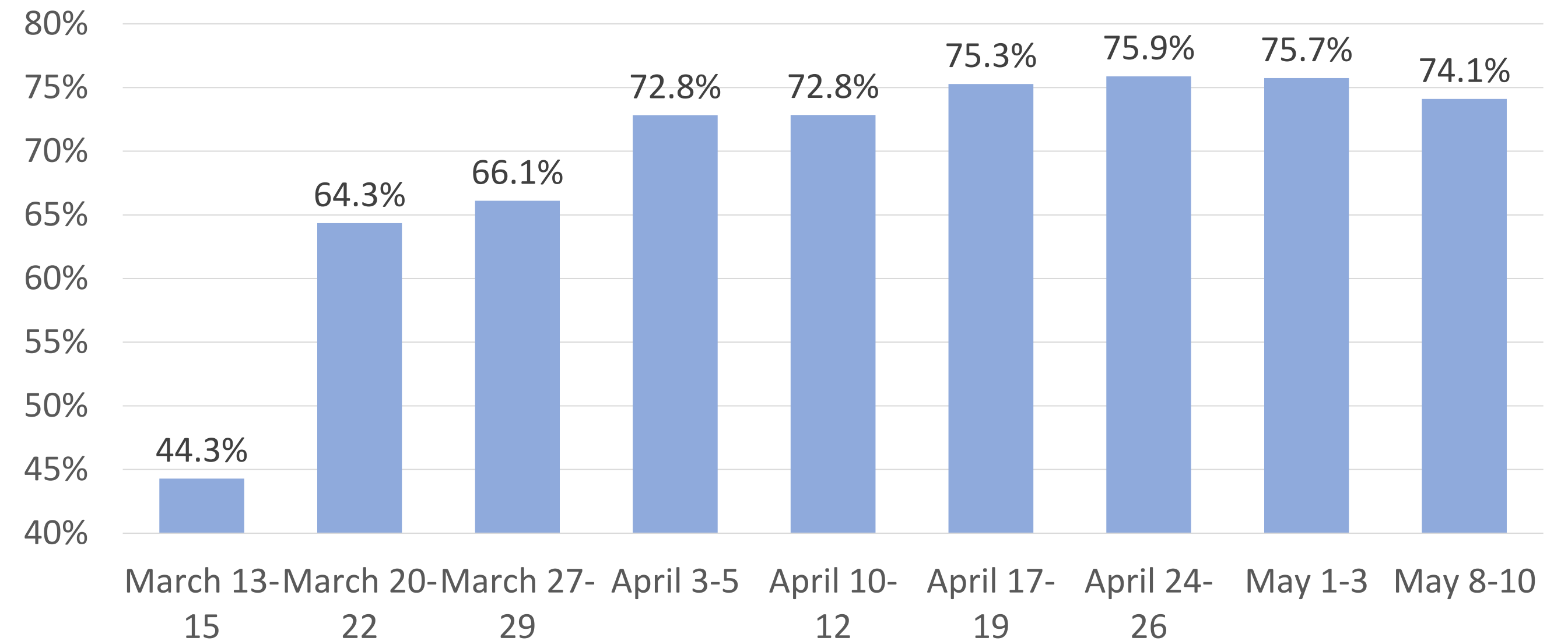
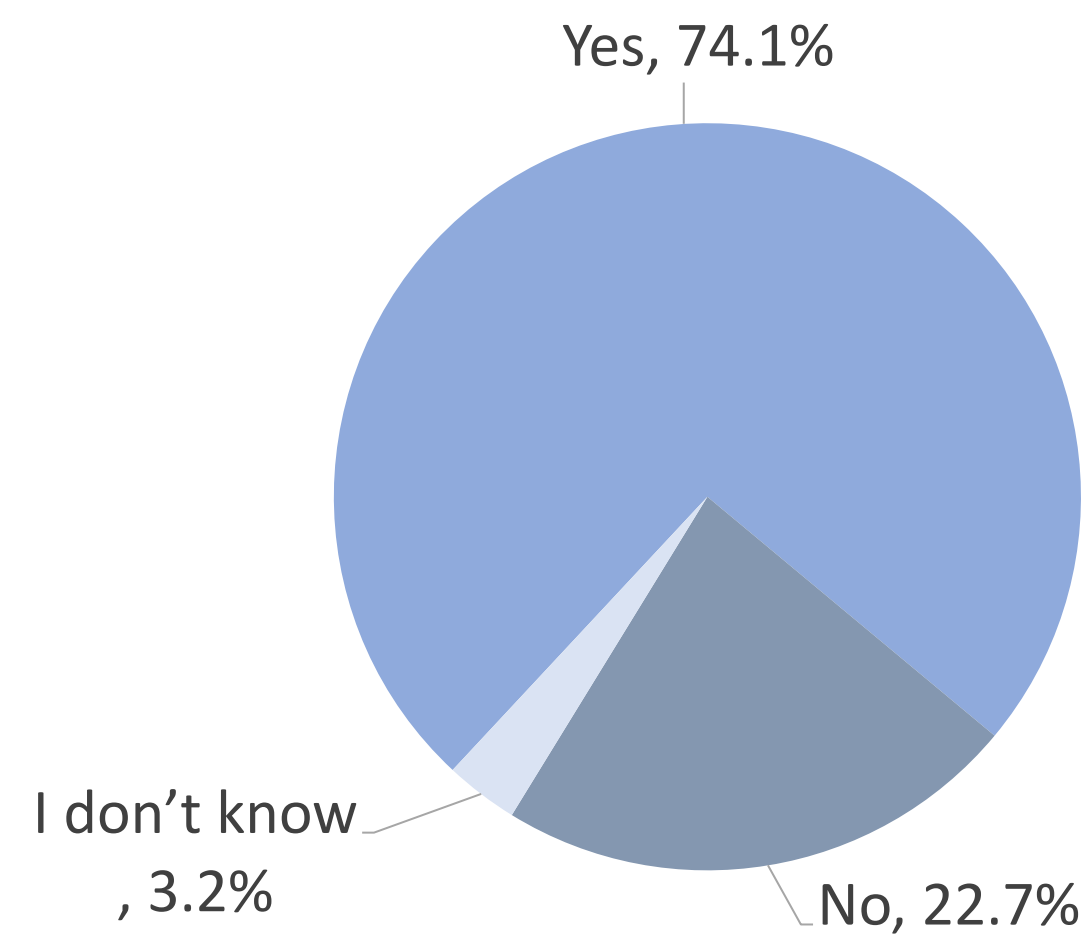
**Section III:
The Pandemic's
Impact on Travel**

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 ninth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus remained relatively stable at 74.1 percent.

Wave 9 (May 8-10)



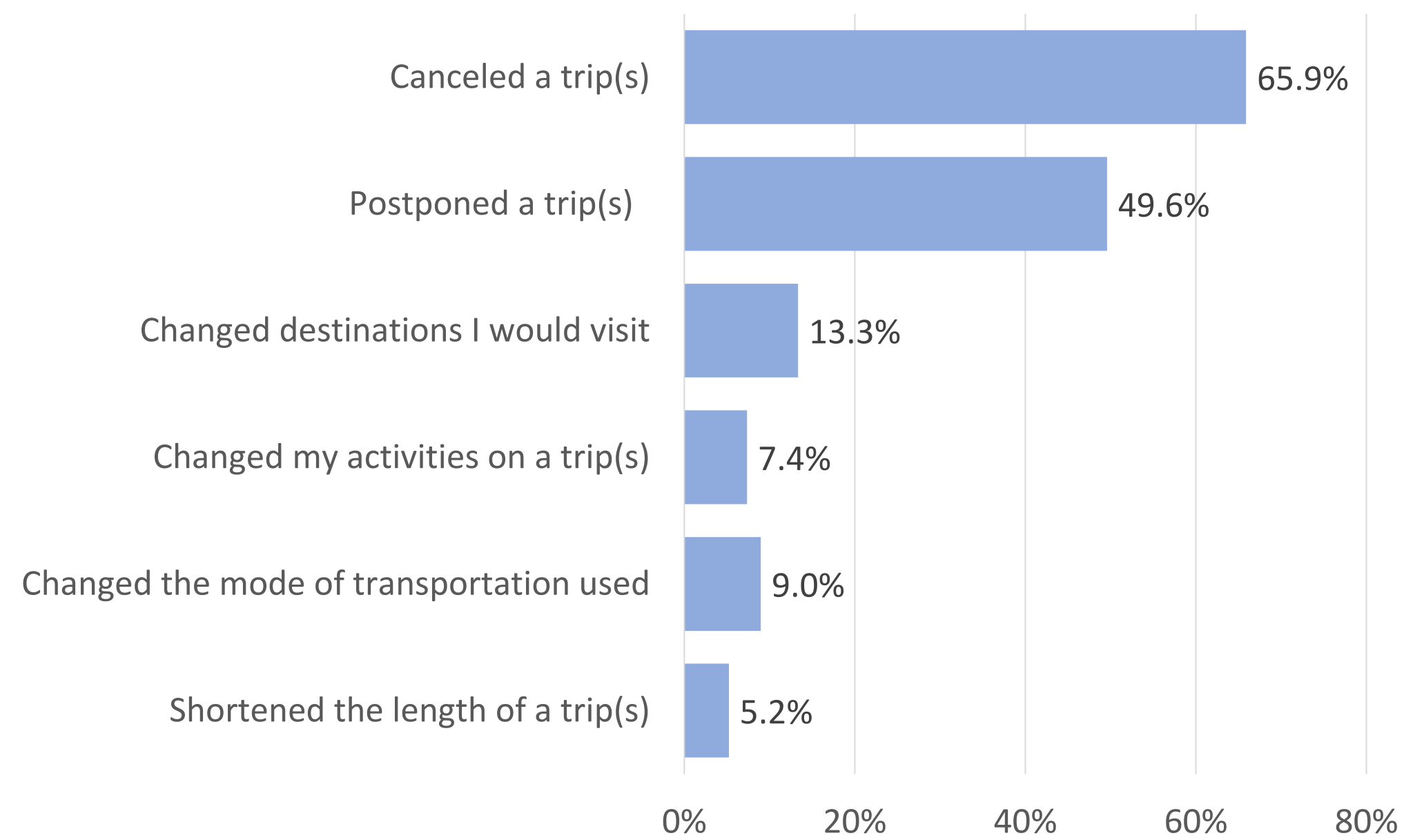
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

How the Coronavirus has Impacted Travel

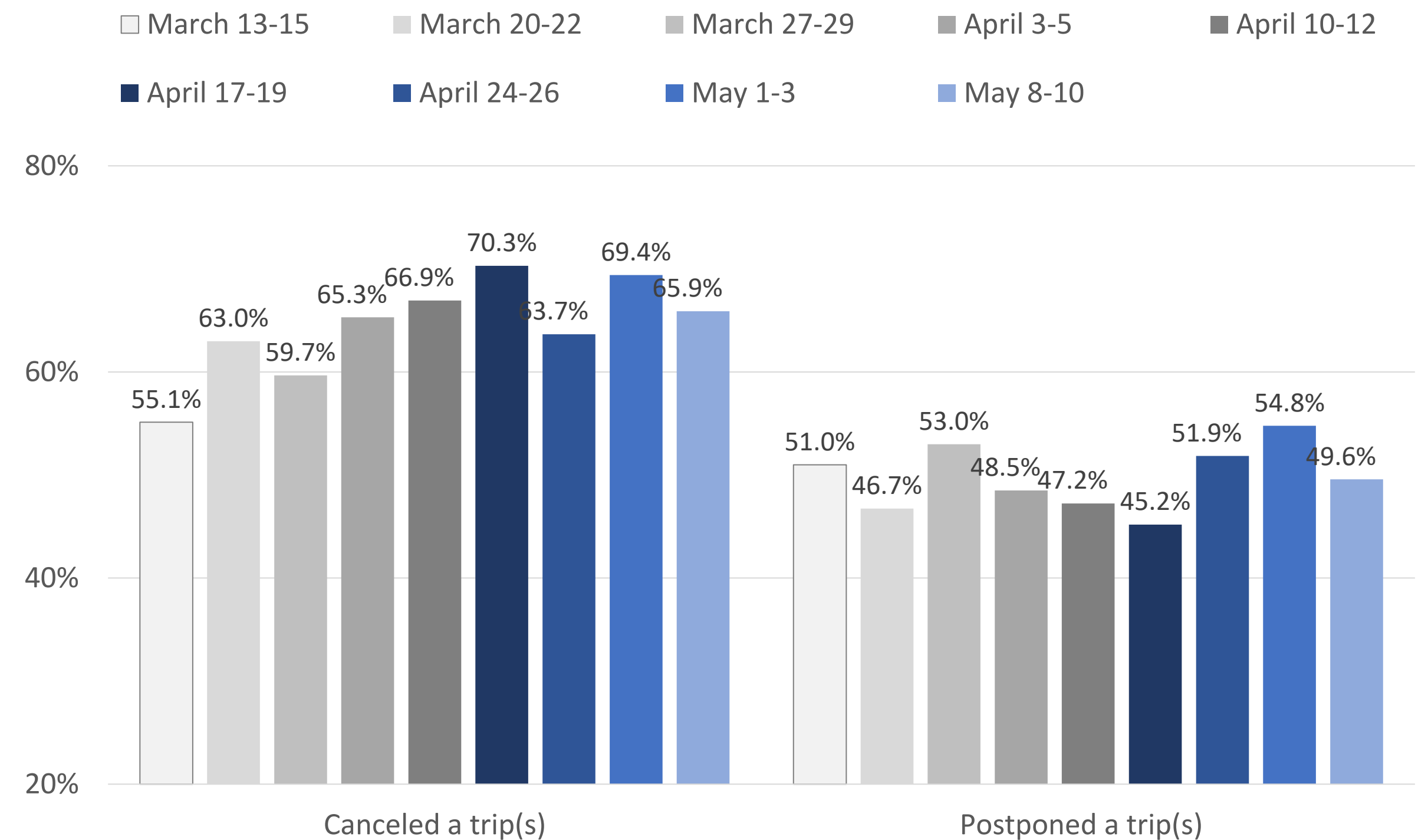
Question: How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have_____.

Wave 9 (May 8-10)



This week, the proportion of American travelers reporting they have cancelled trips due to the coronavirus fell to 65.9 percent from 69.4 percent last week.



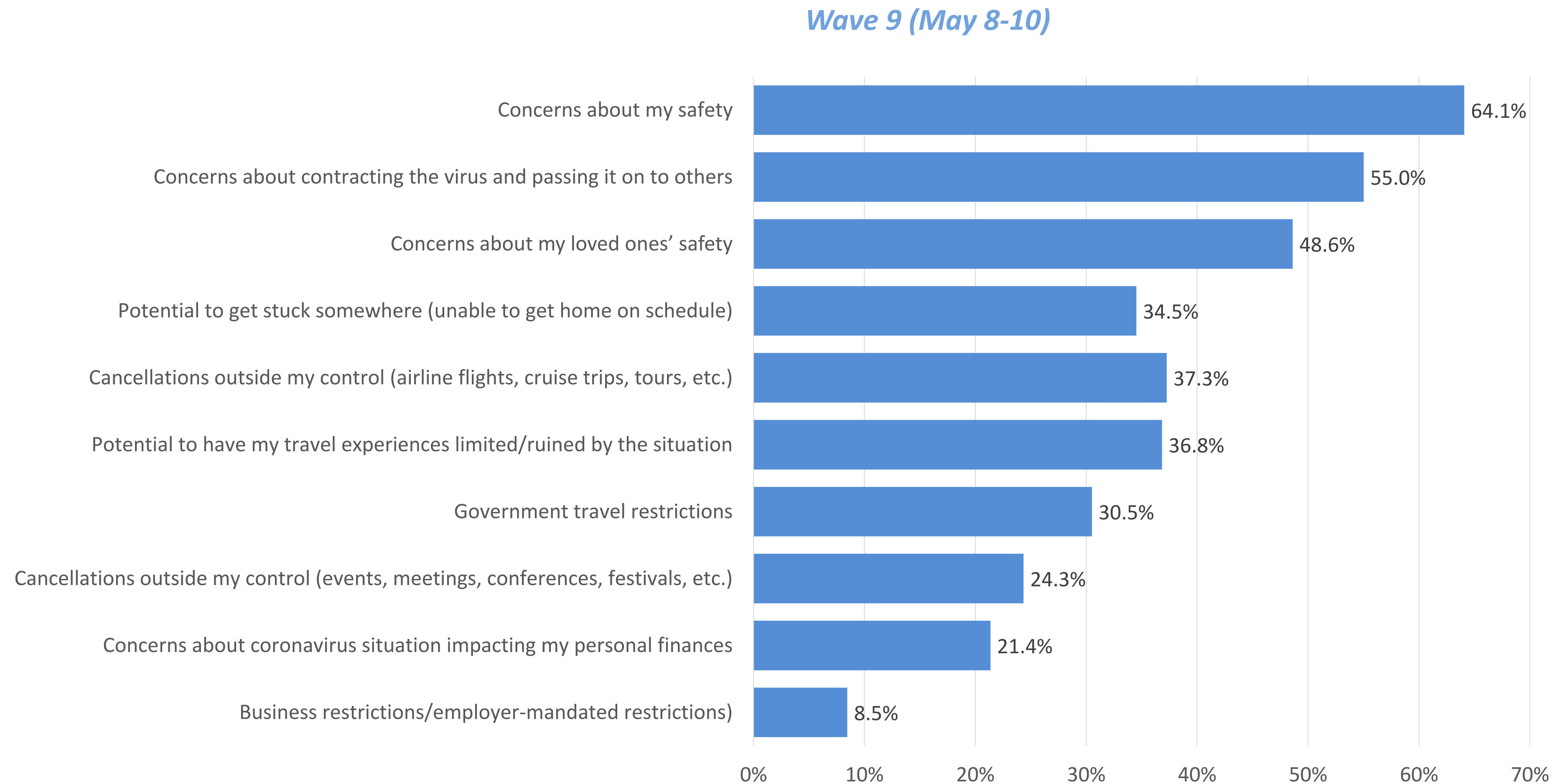
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

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 (64.1%).

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

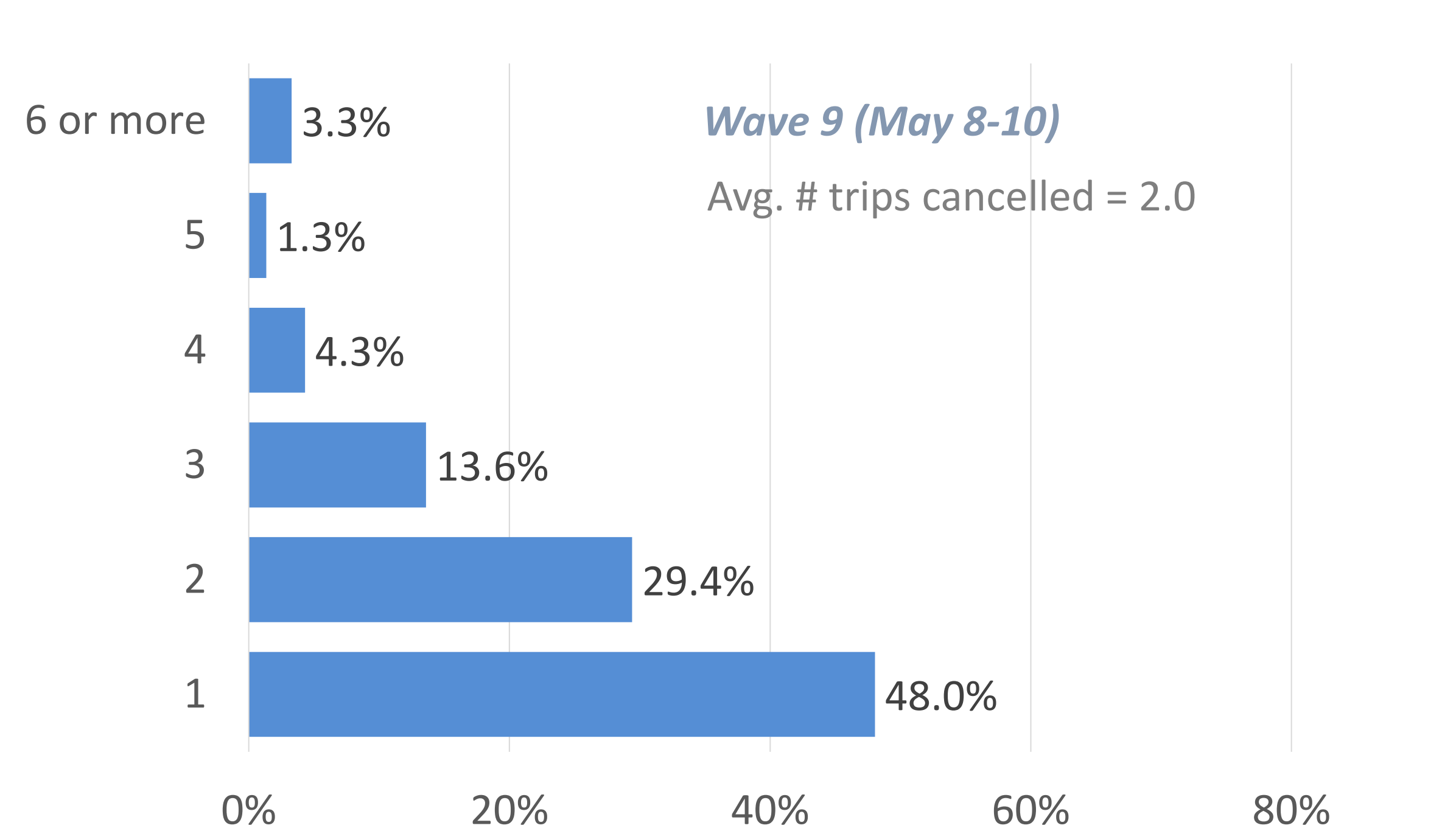
(Base: Wave 9. Respondents whose travel was impacted by the coronavirus, 926 completed surveys. Data collected May 8-10, 2020)



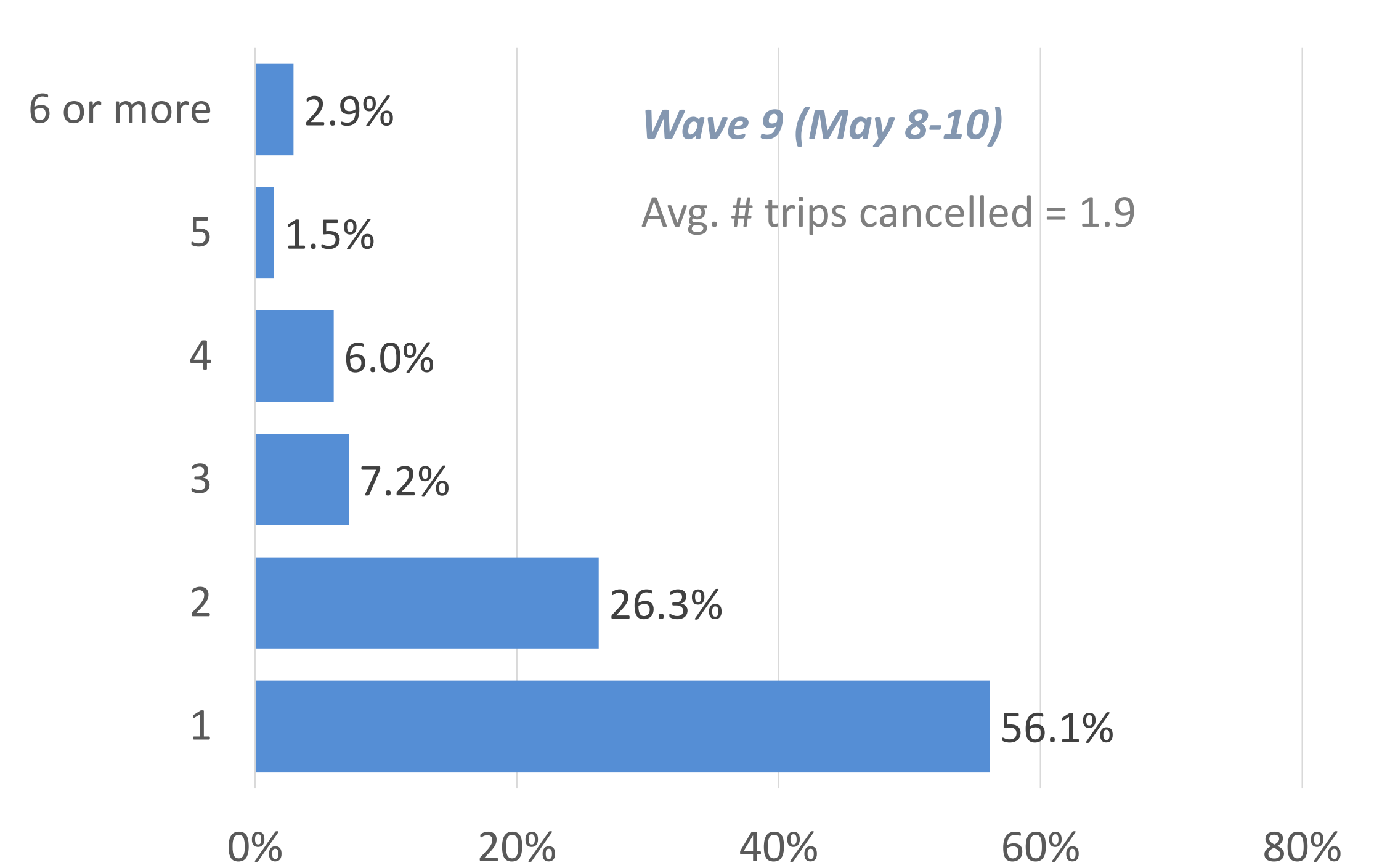
Trips Cancelled/Postponed

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 1.9 trips due to the crisis.

Question: How many trips did you cancel?



Question: How many trips did you postpone?



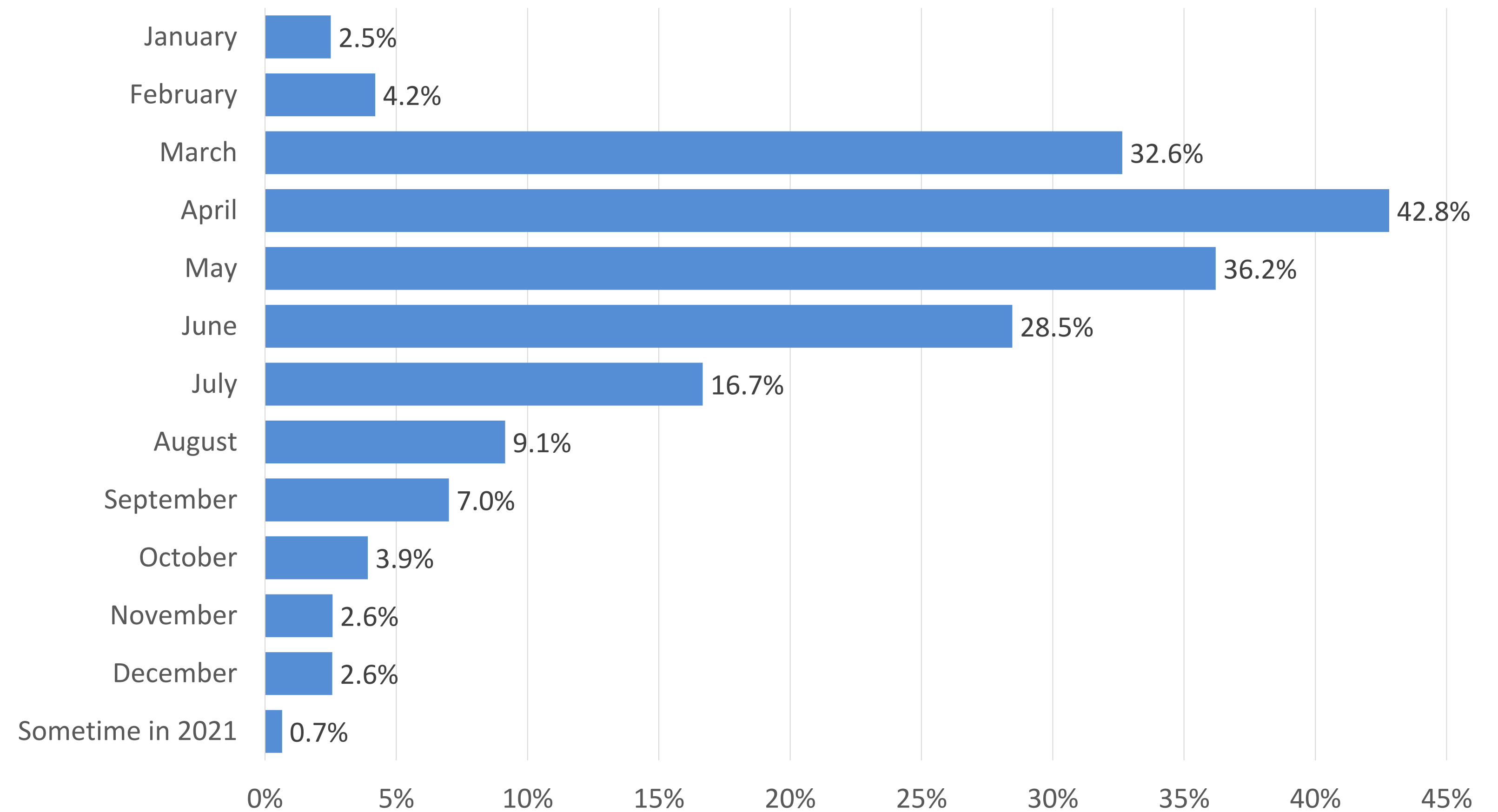
(Base: Wave 9, Respondents cancelling/postponing a trip, 606/442 completed surveys. Data collected May 8-10, 2020)

Month of Trip Cancellation

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

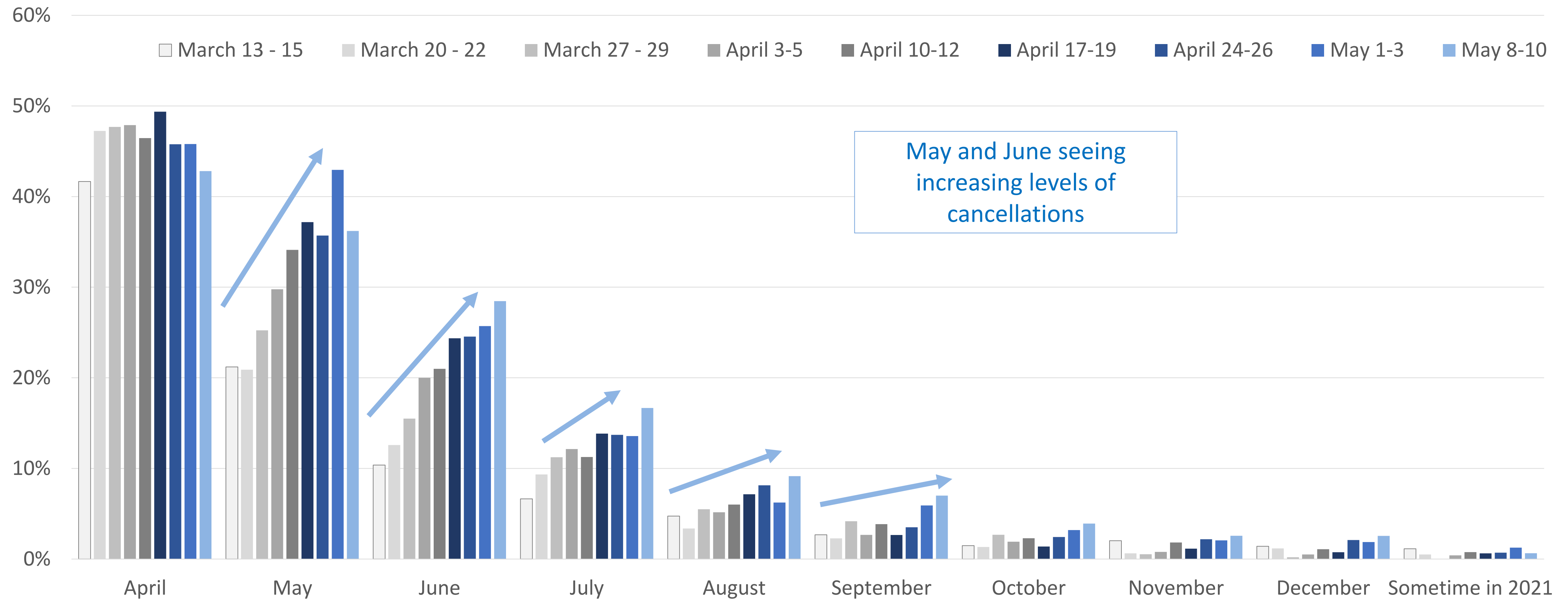
(Base: Wave 9. Cancelling trips, 605 completed surveys. Data collected May 8-10, 2020)

Cancellations of May, June and July 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)



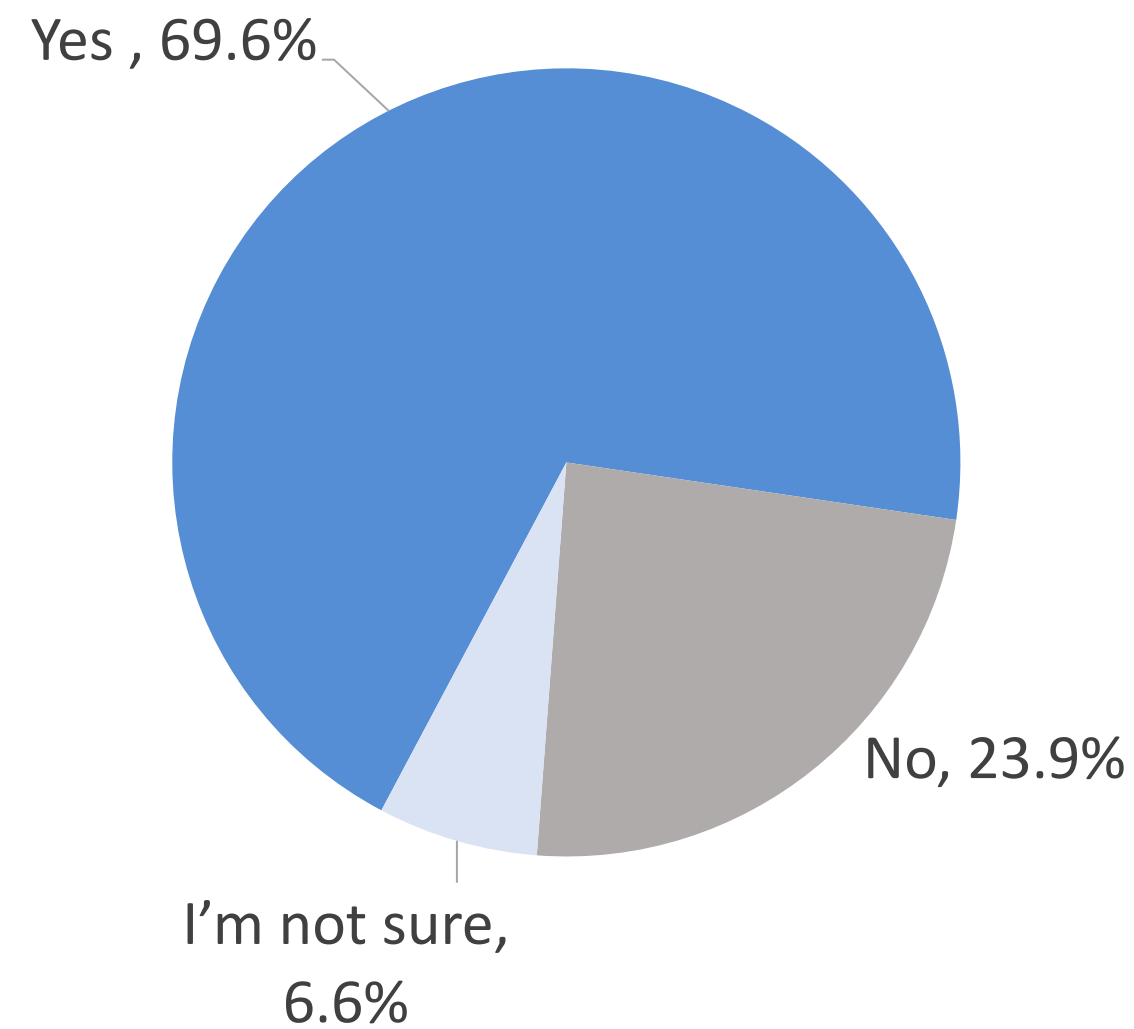
(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640 and 605 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3 and 8-10, 2020. Note: Data purposefully excluded from this chart for readability.)

Did Traveler Get Full Refunds?

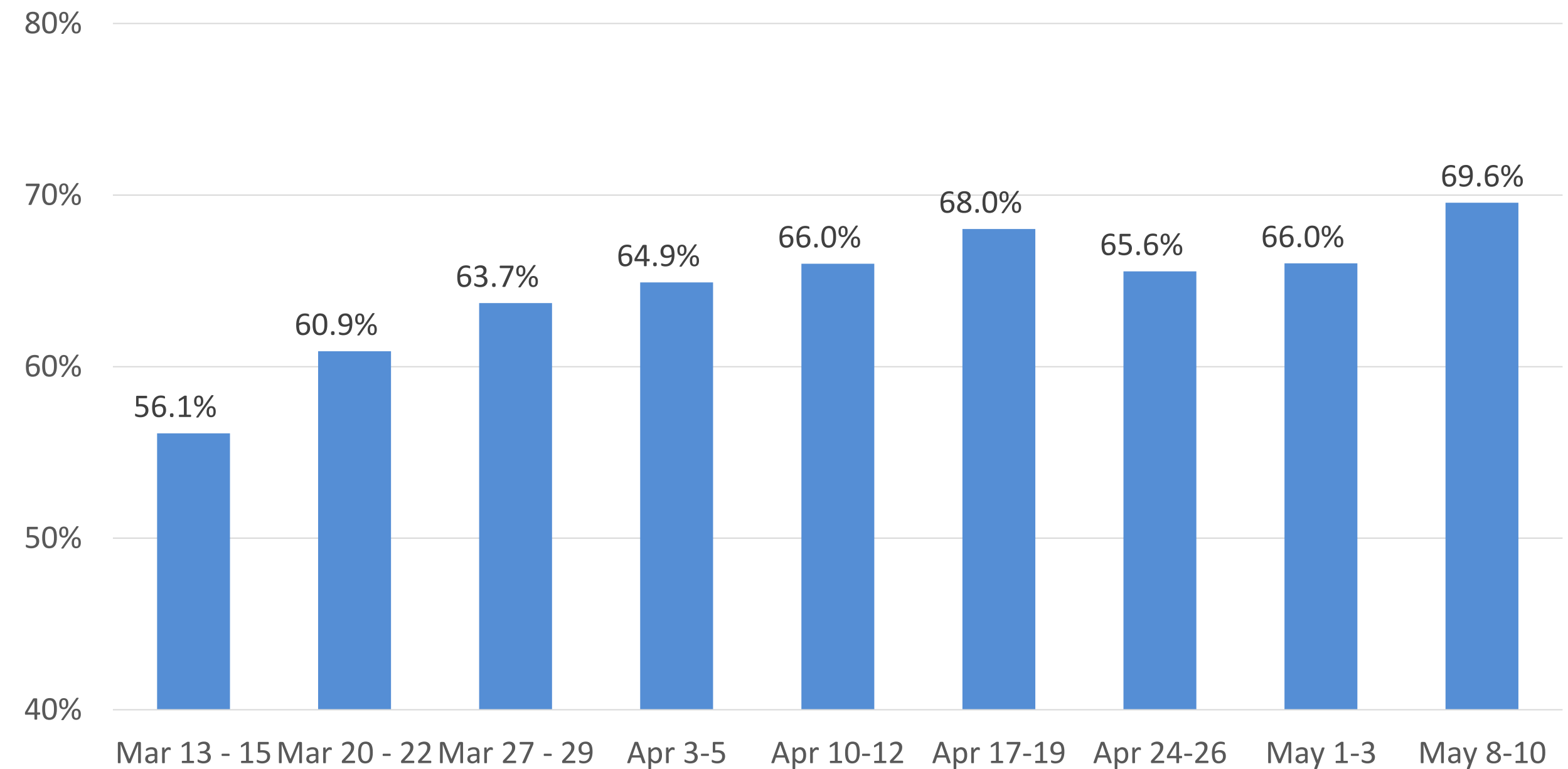
Question: Did you get full refunds for any reservations you canceled? (Select one)

The proportion of travelers being fully refunded for cancelled trips rose this week. 69.6 percent report receiving full refunds.

Wave 9 (May 8-10)



(Base: Wave 9. Respondents cancelling a trip, 606 completed surveys. Data collected May 8-10, 2020)

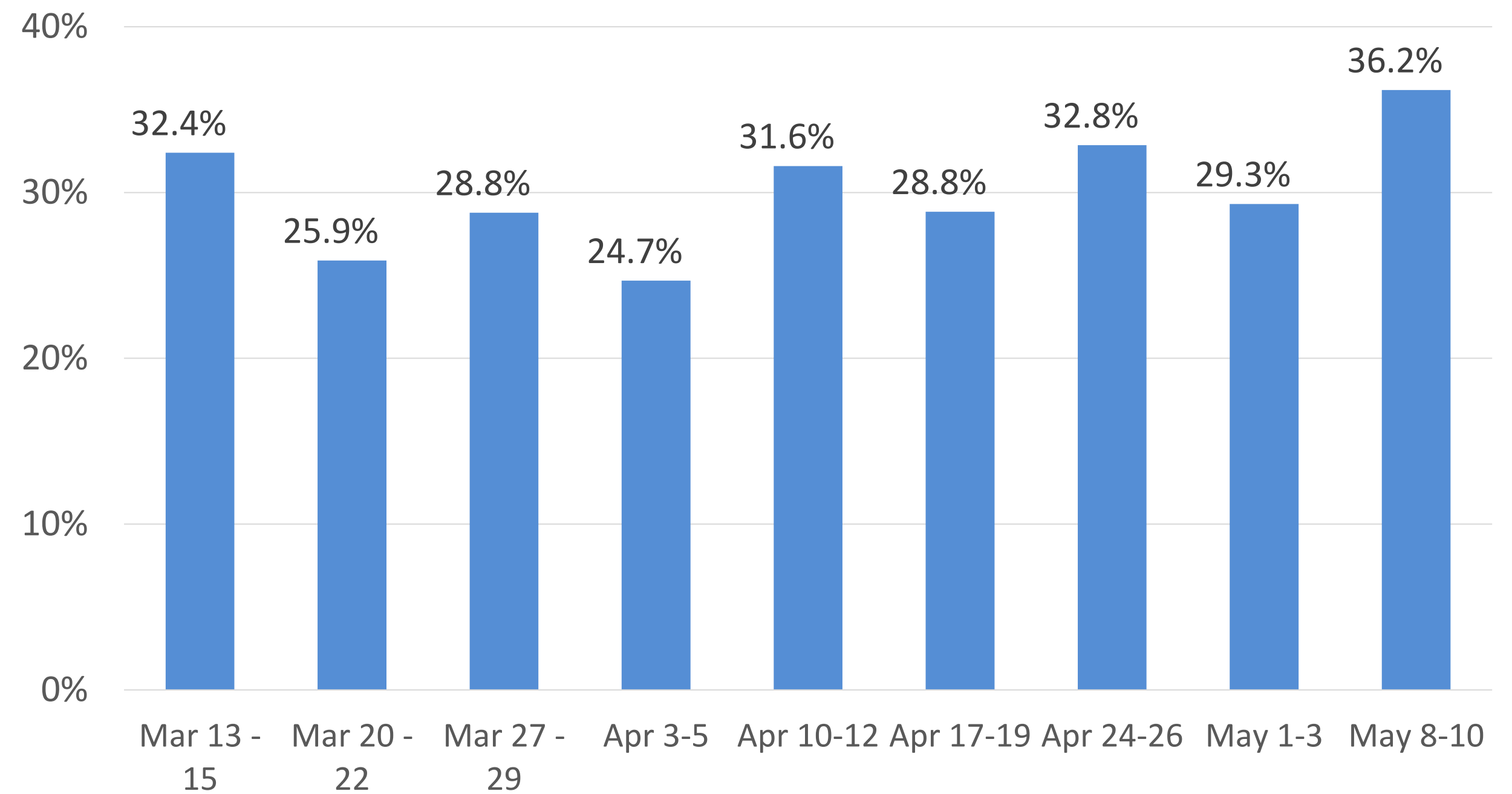
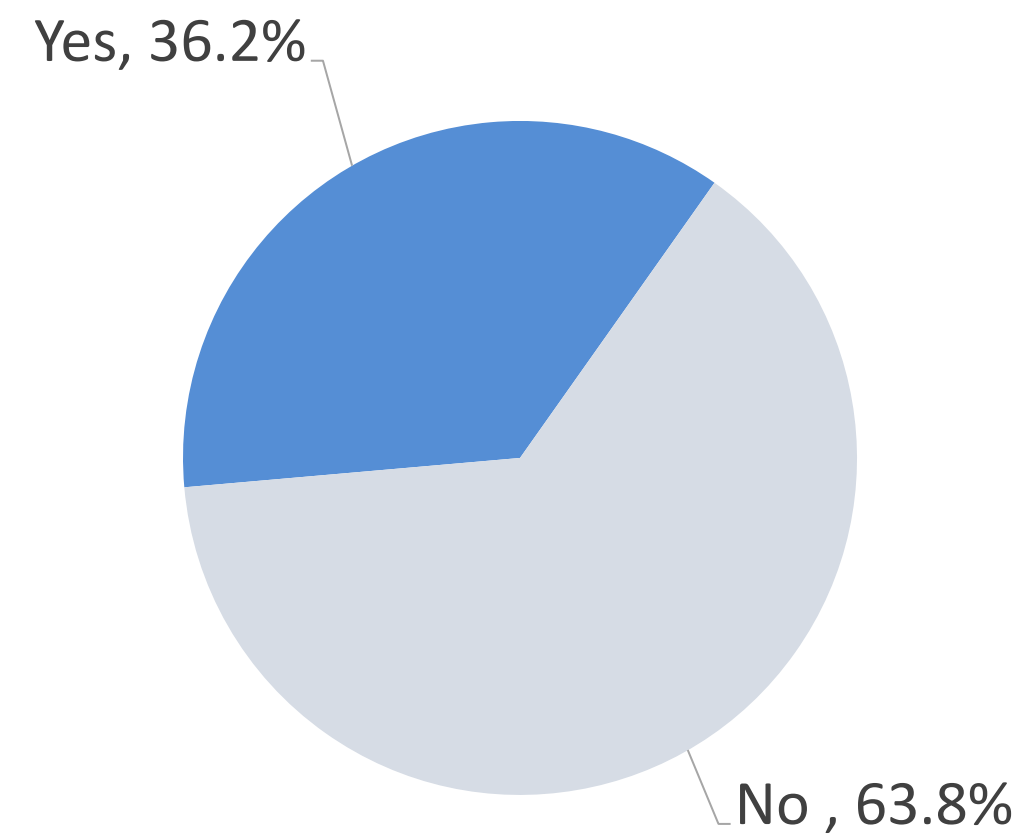


Were Postponed Trips Rescheduled?

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

Approximately 6-in-10 American travelers who have postponed a trip due to the pandemic have not yet rescheduled it.

Wave 9 (May 8-10)

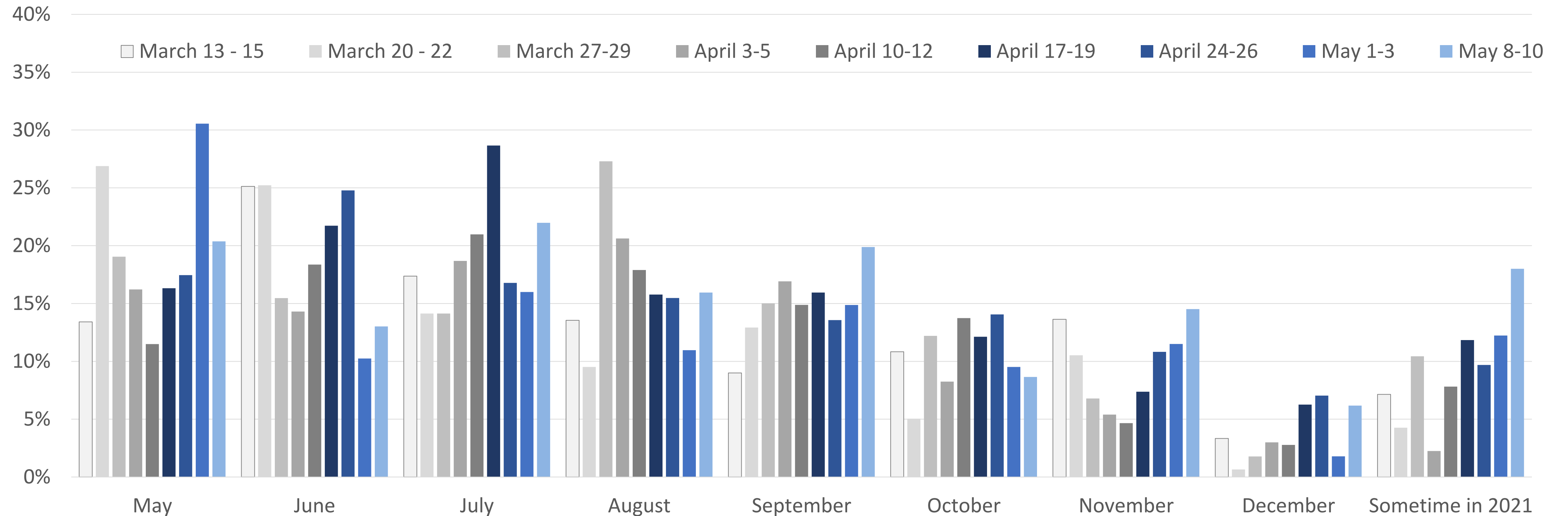


(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463, 506 and 442 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3 and 8-10, 2020)

Month Postponed Trips Rescheduled

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

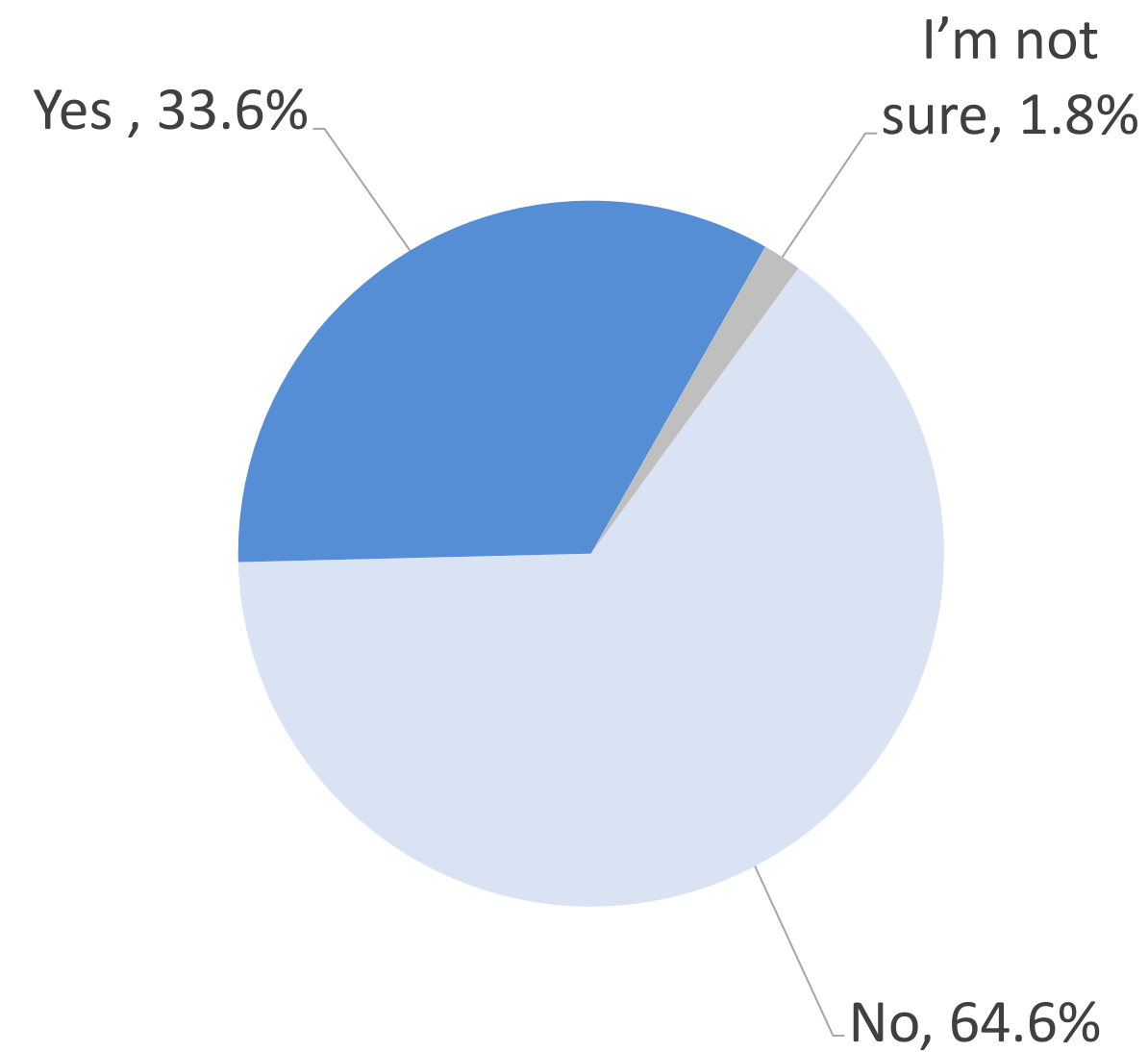
Question: The trip(s) you postponed were rescheduled to take place in which month(s)? (Select all that apply)



(Base: Postponing trips rescheduled, 99, 86, 120, 107, 132, 123, 145, 144 and 142 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3 and 8-10, 2020)

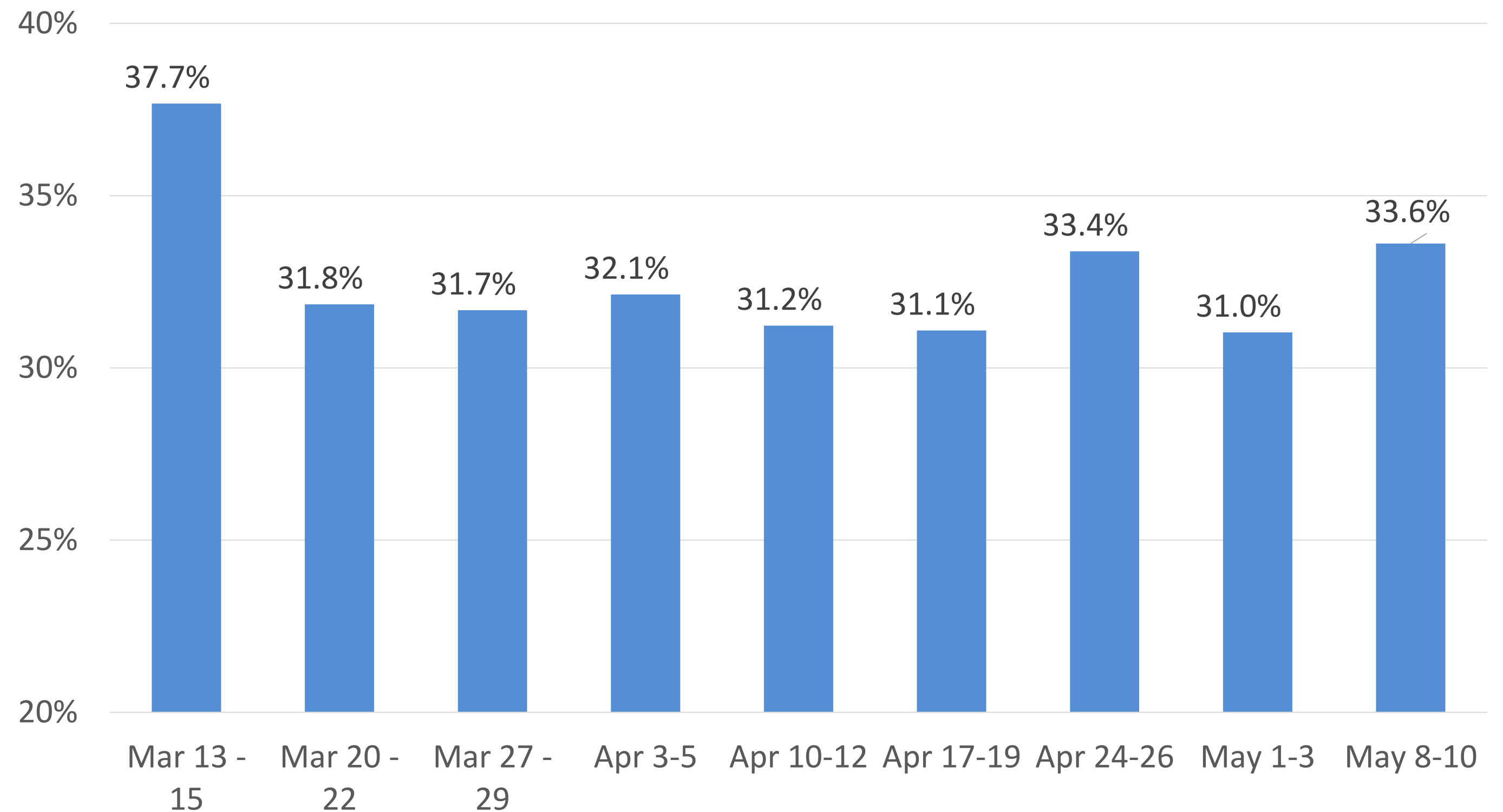
International Trips Postponed or Cancelled

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



(Base: Wave 9. Respondents cancelling or postponing a trip, 903 completed surveys. Data collected May 8-10, 2020)

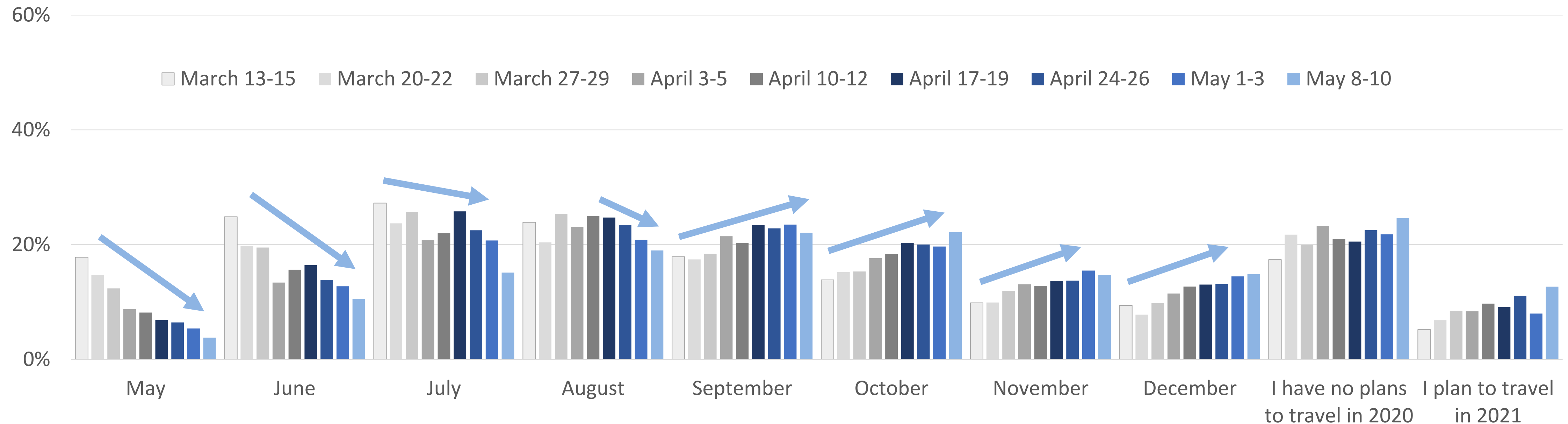
One-in-three (33.6%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure rose this week.



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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3 and 8-10, 2020)

Excitement to Travel Now

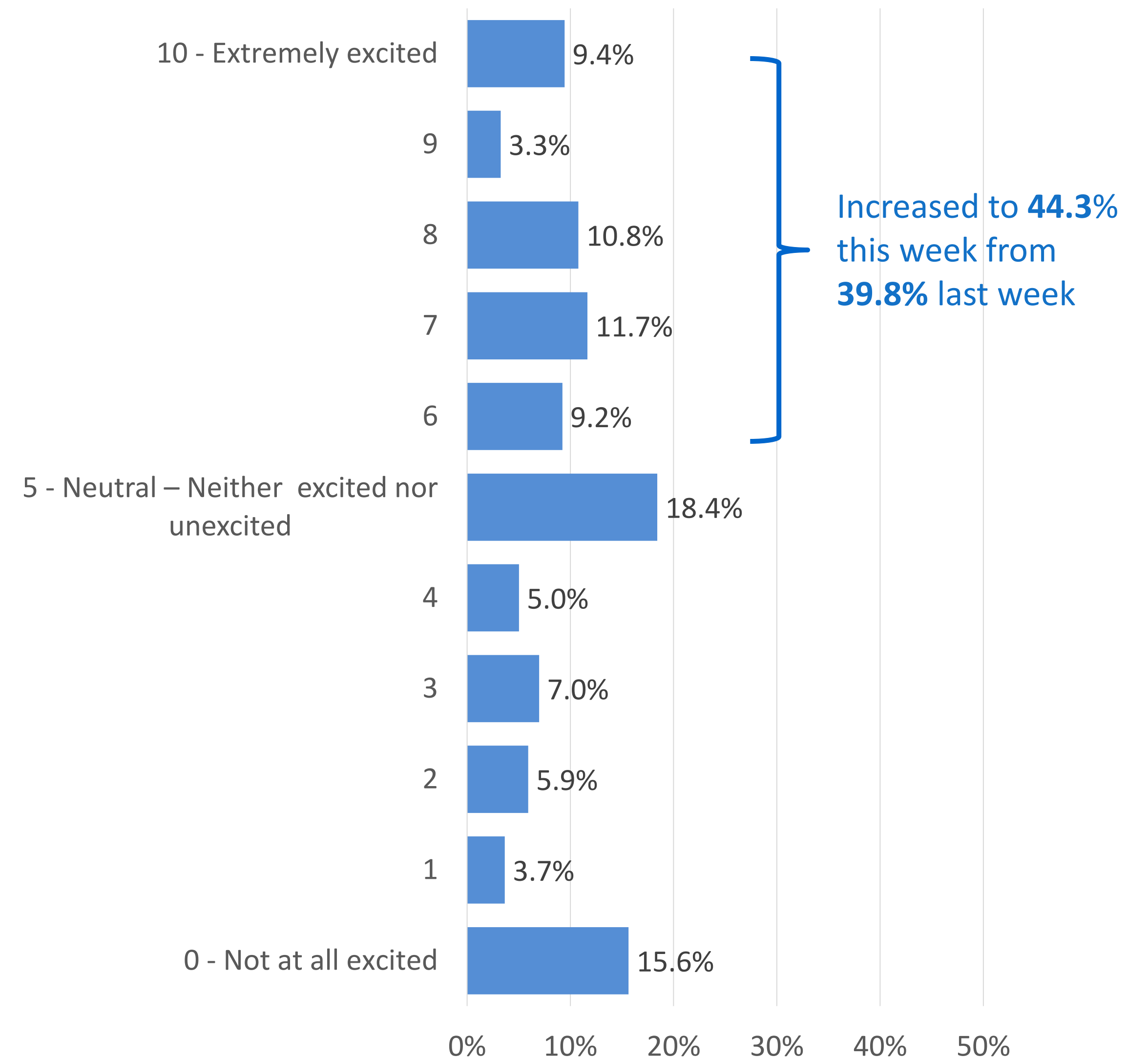
Interest in even short trips increased again slightly this week.

4-in-10 travelers (44.3%) 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 39.8 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 completed surveys.
Data collected May 8-10, 2020)*

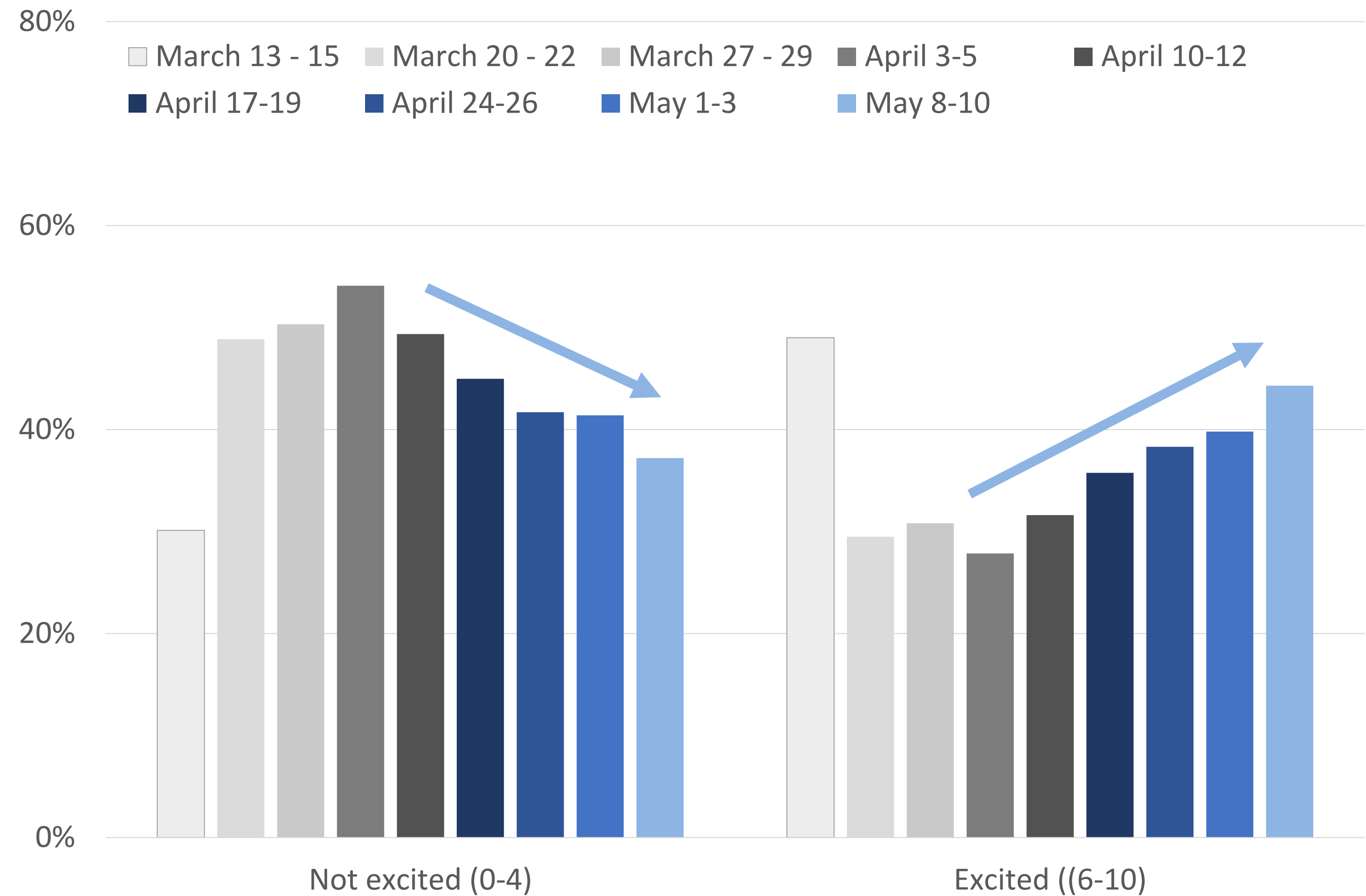


Excitement to Travel Now (Excited vs. Not Excited)

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

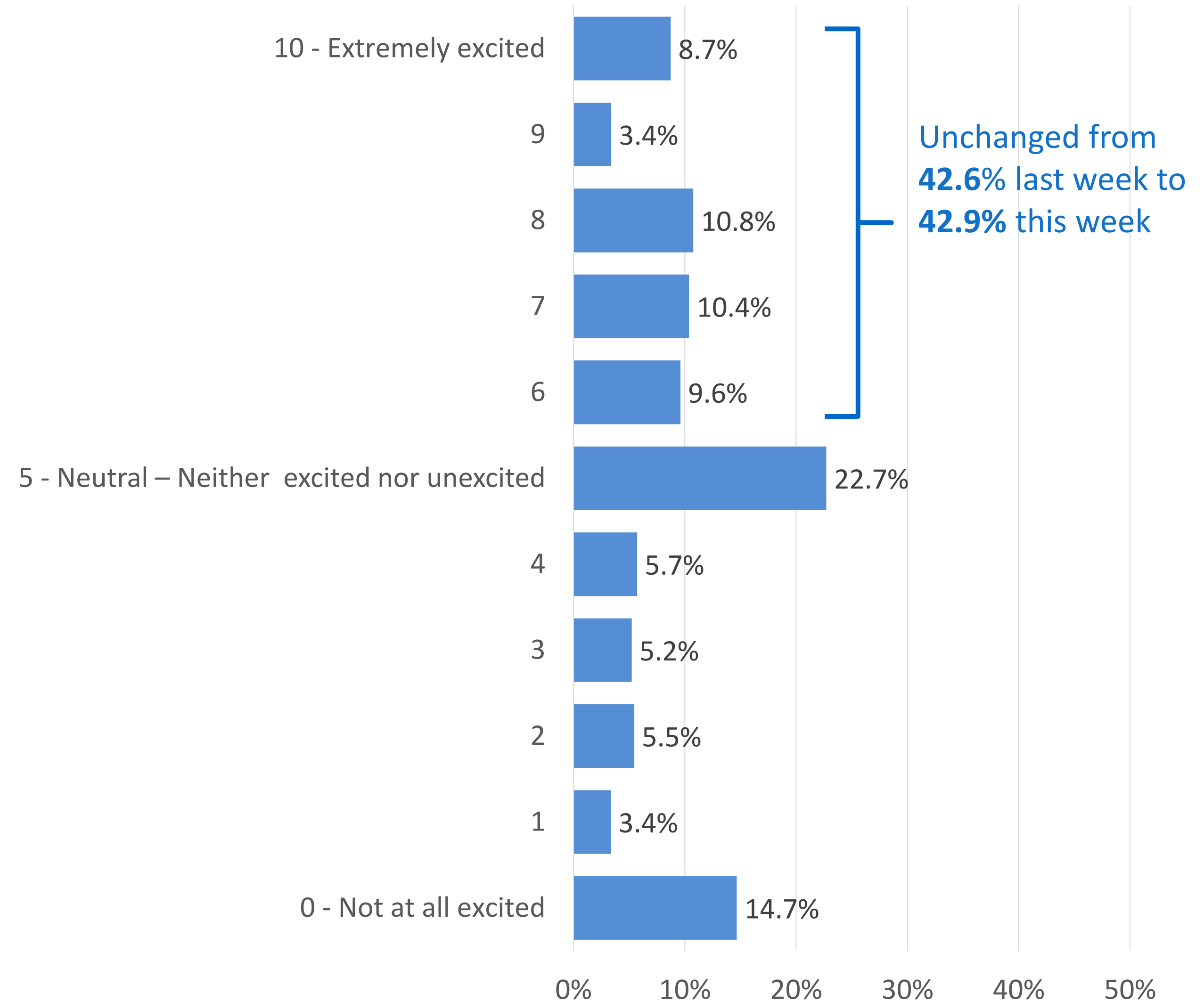


Openness to Travel Information

Travelers' interest in learning about new travel experiences and destinations was unchanged this week. Four-in-ten (42.9%) expressed some level of excitement about the topic.

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

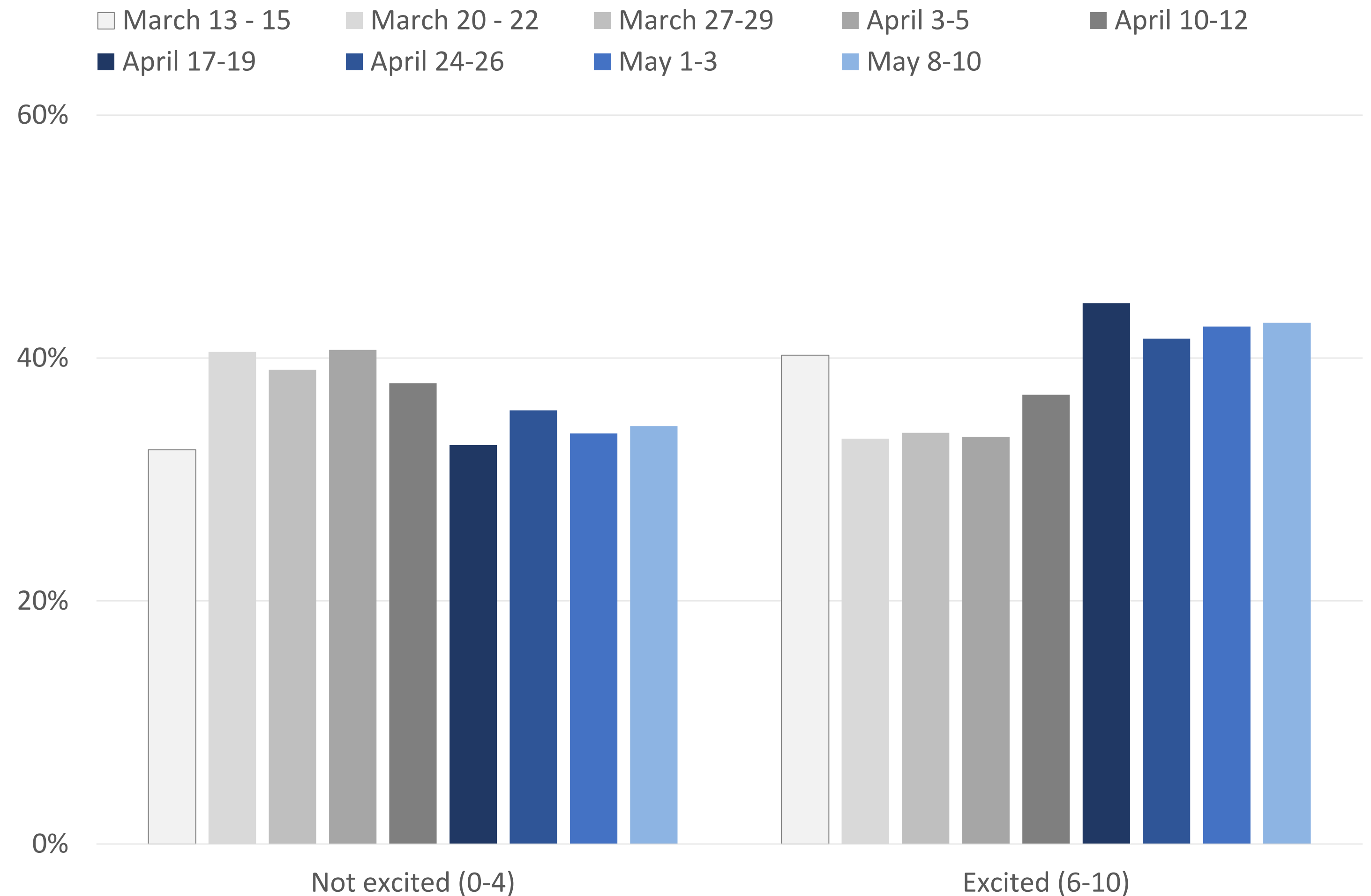
*(Base: All respondents, 1,200 completed surveys.
Data collected May 8-10, 2020)*



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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

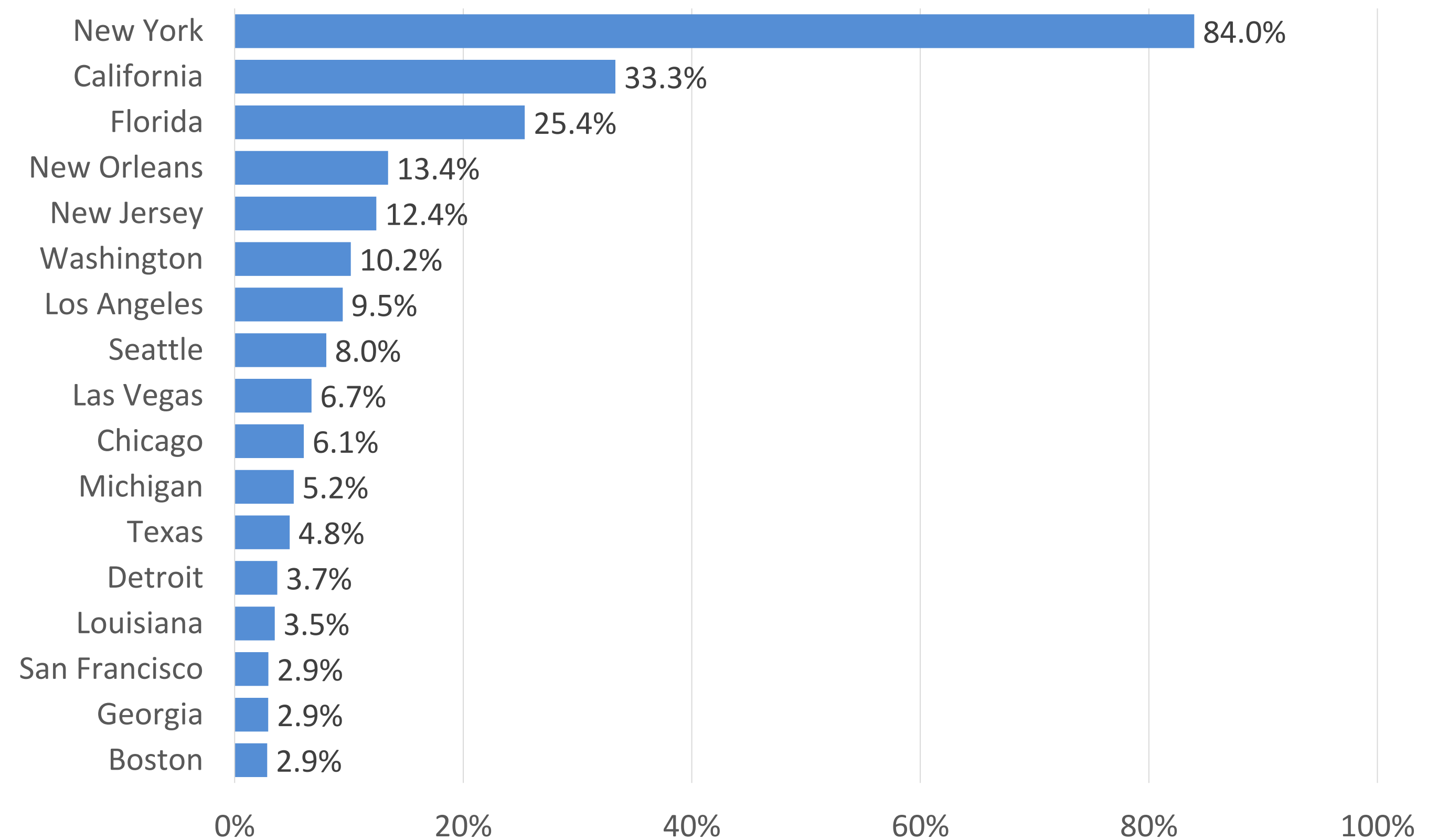


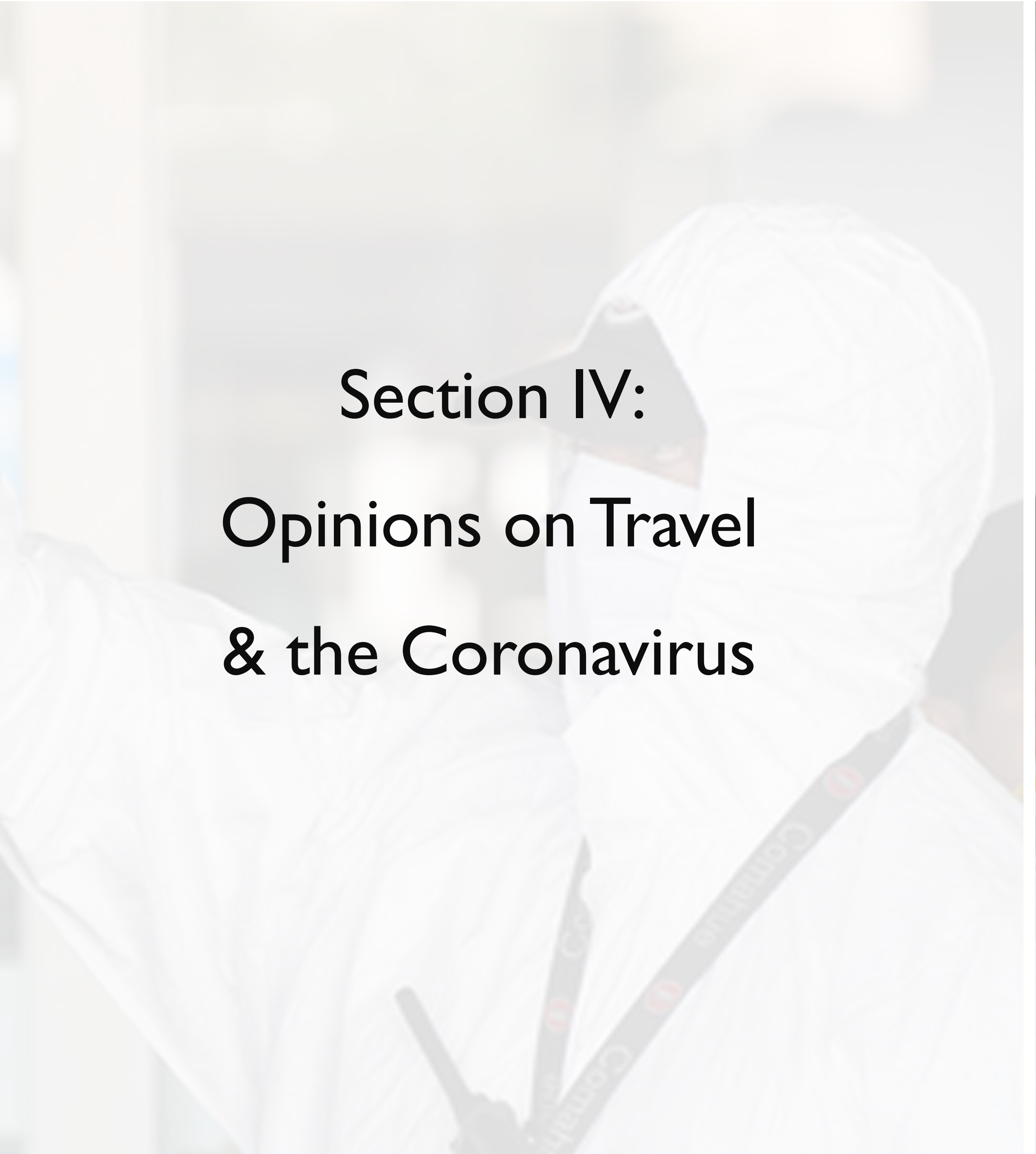
Most Talked About Coronavirus Hotspots

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

New York continues to be the most talked about destination with coronavirus issues. Nearly 84 percent of survey respondents identified New York as one of the three most talked about places.

(Base: Wave 9. All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)





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

Avoiding Travel Until the Crisis Blows Over

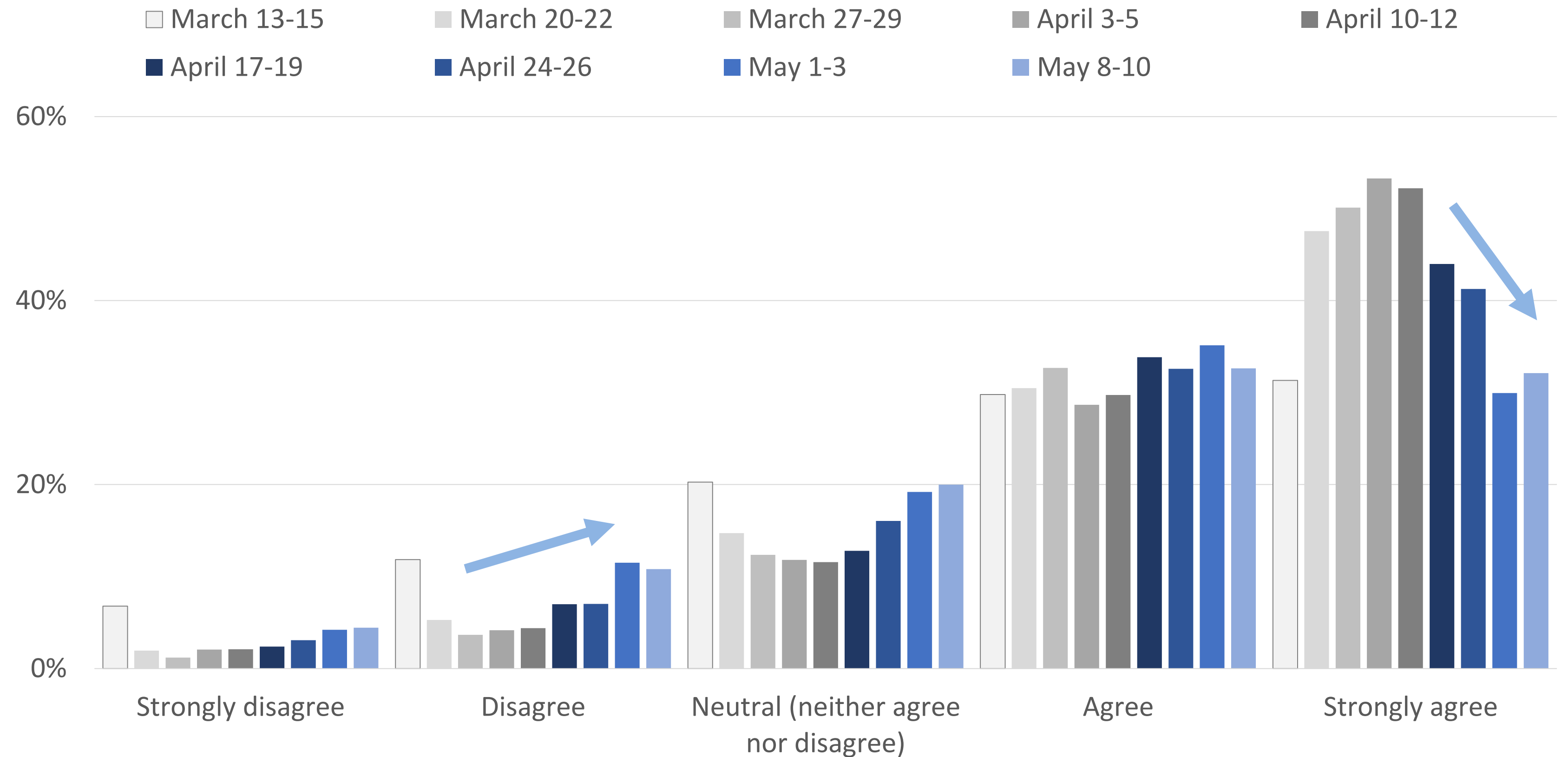
This week, just under two-thirds (64.8%) of American travelers say they are done traveling until the coronavirus situation blows over.

Strong agreement with this statement has declined significantly.

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



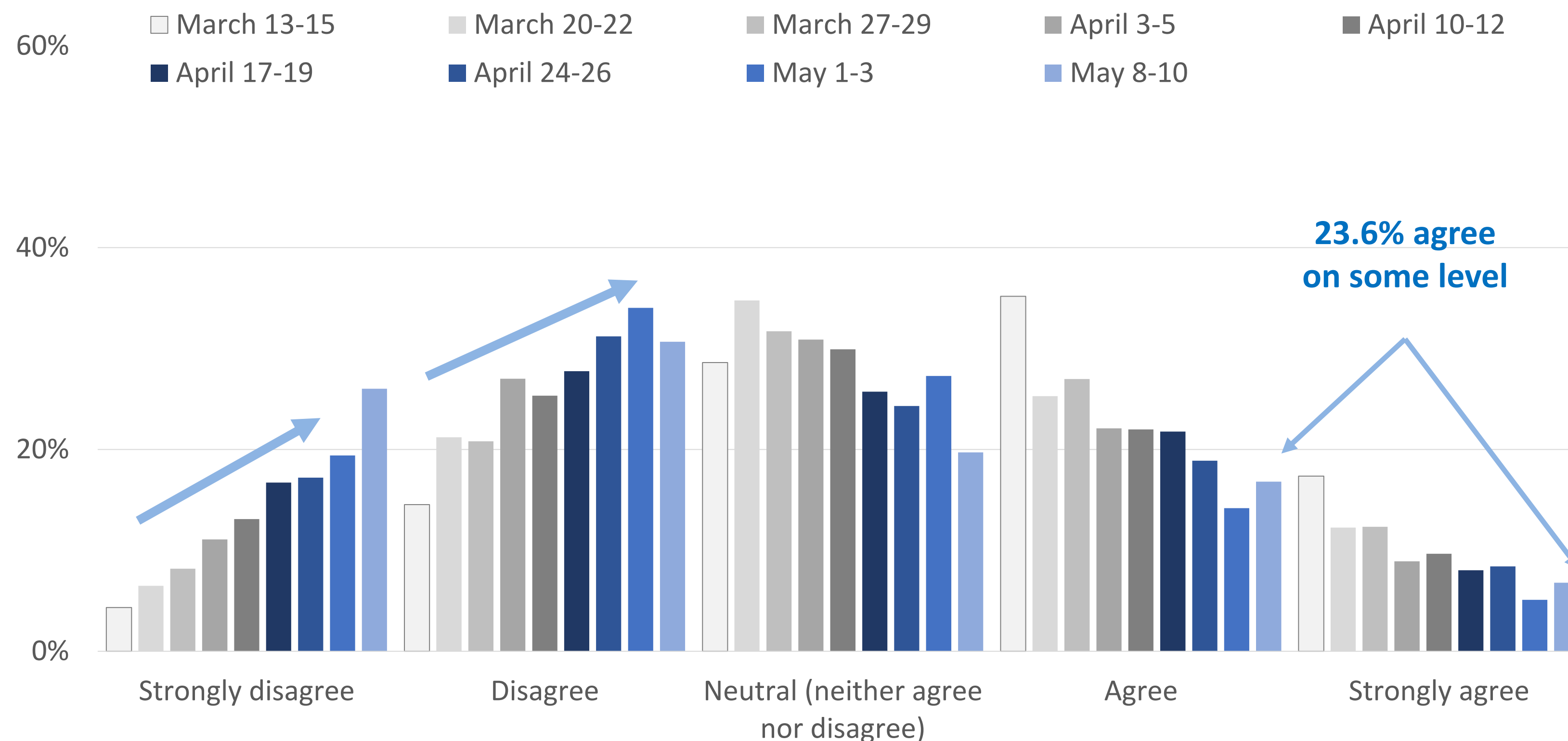
Expectations for Summer Travel Season

Agreement that the coronavirus situation will be resolved by the summer travel season continues to decline. Now, 56.7 percent of Americans disagree that the coronavirus situation will be resolved before summer (up from 53.4% last week).

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



Expectations for Fall Travel Season

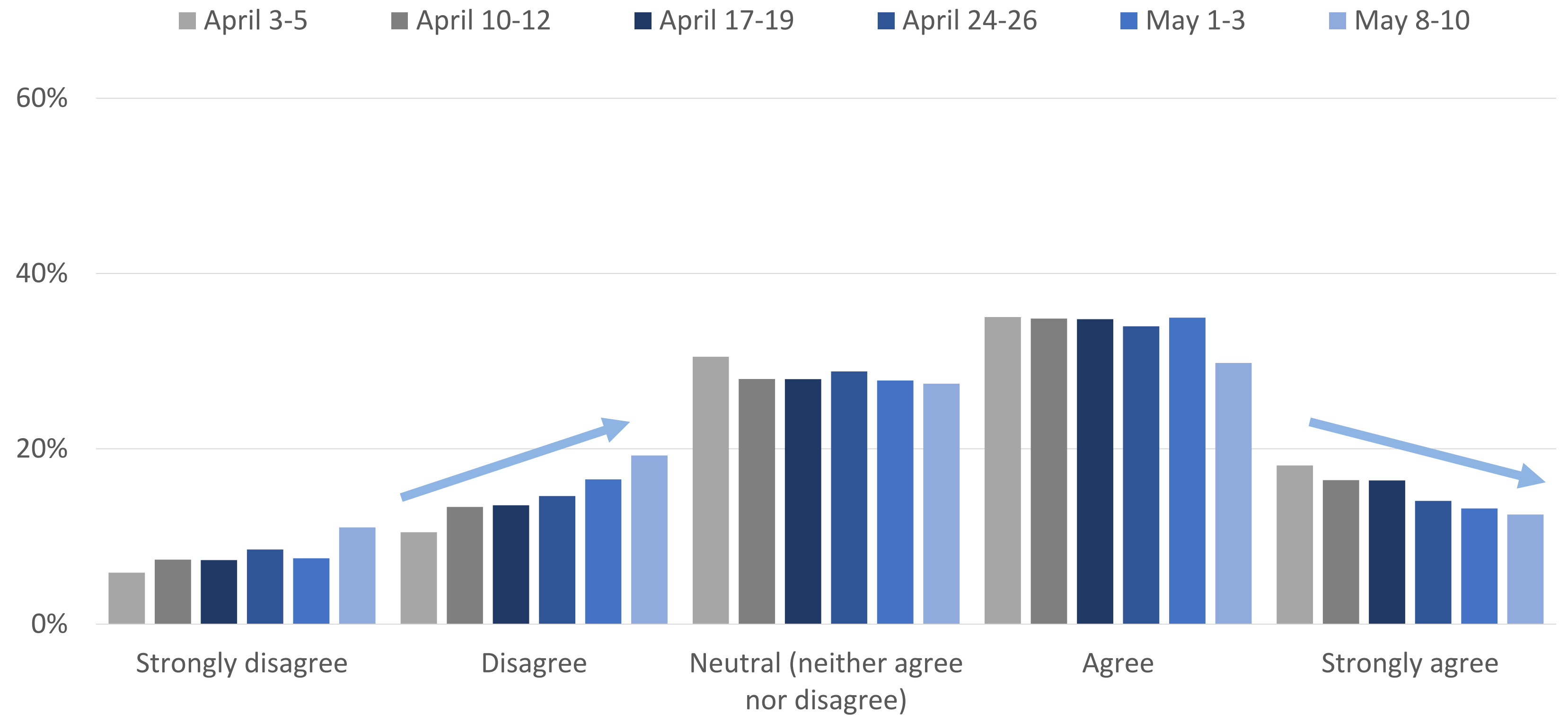
Americans' optimism for travel to return in the fall declined this week. Now, only 42.3 percent expect to be back traveling this Fall (down from 48.2% last week).

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, 1,263, 1238, 1,208, 1,204 and 1,200 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

Question Added in Wave 4



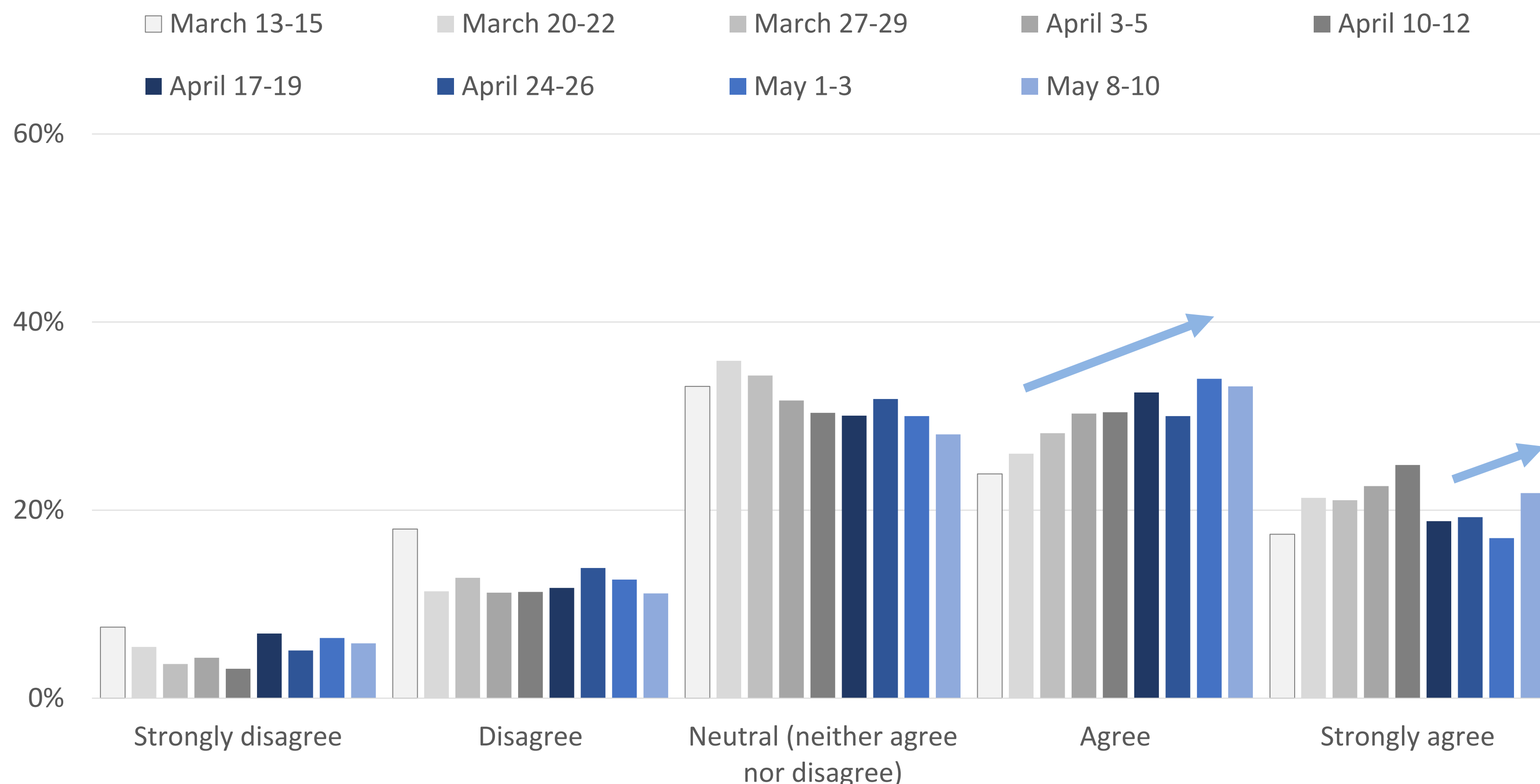
Staycations as a Replacement for Vacations

Opinions on staycations replacing vacations this summer has grown. This week, 55.0 percent of American travelers agree that staycations may end up replacing vacations this summer (55.0% vs. 51.0% 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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



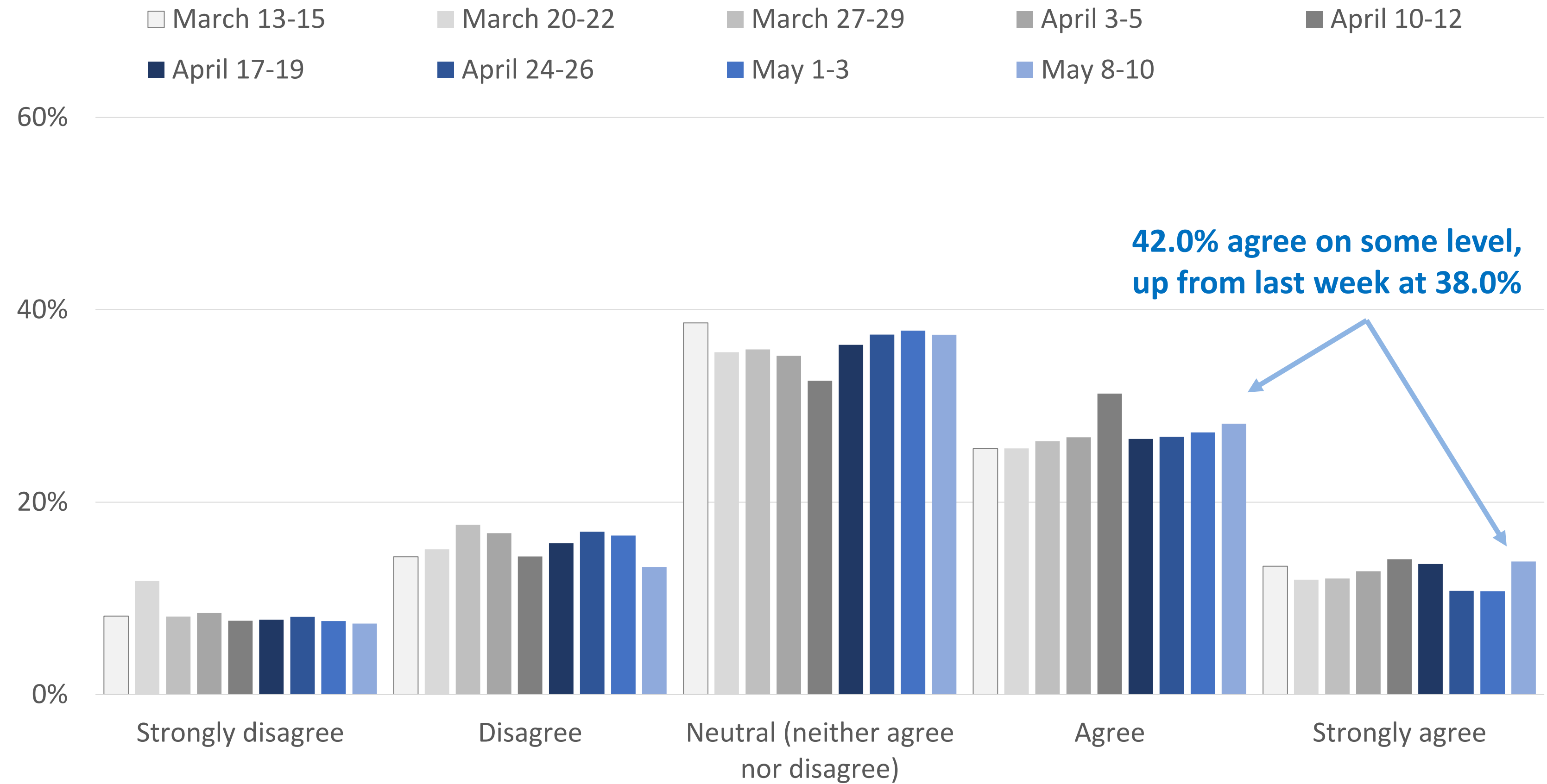
Replacing Air Travel With Road Trips

Up from last week, 42.0 percent of Americans now 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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



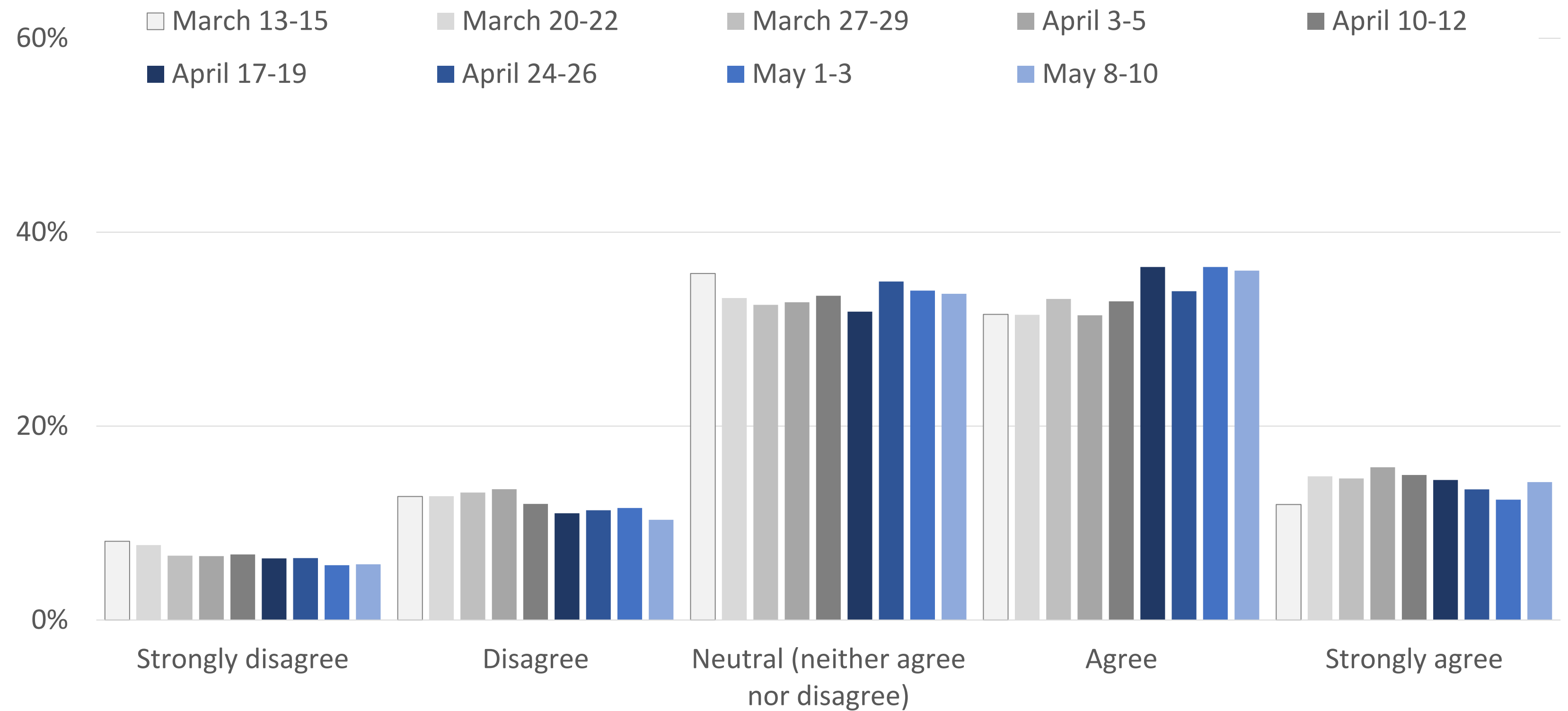
Replacing Long-Haul Travel with Regional Trips

Half (50.3%) still say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus (up slightly from last week at 48.8%).

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



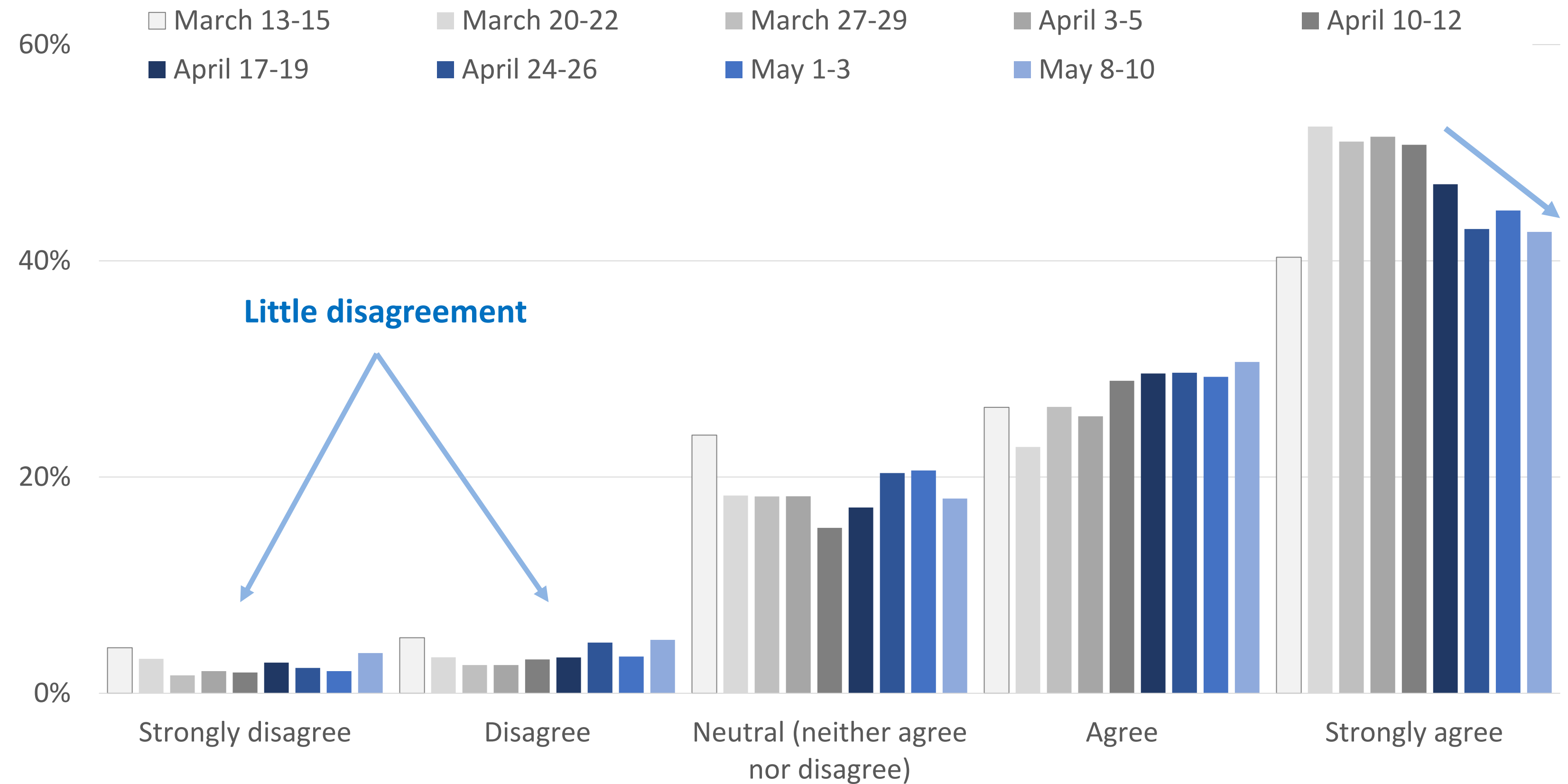
Avoiding Conventions & Conferences

The likelihood of American travelers attending meetings in the current environment remains low. Under three-quarters of travelers (73.3%) say they will be unlikely to attend these events until the coronavirus situation is over (similar to last week at 73.9%).

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



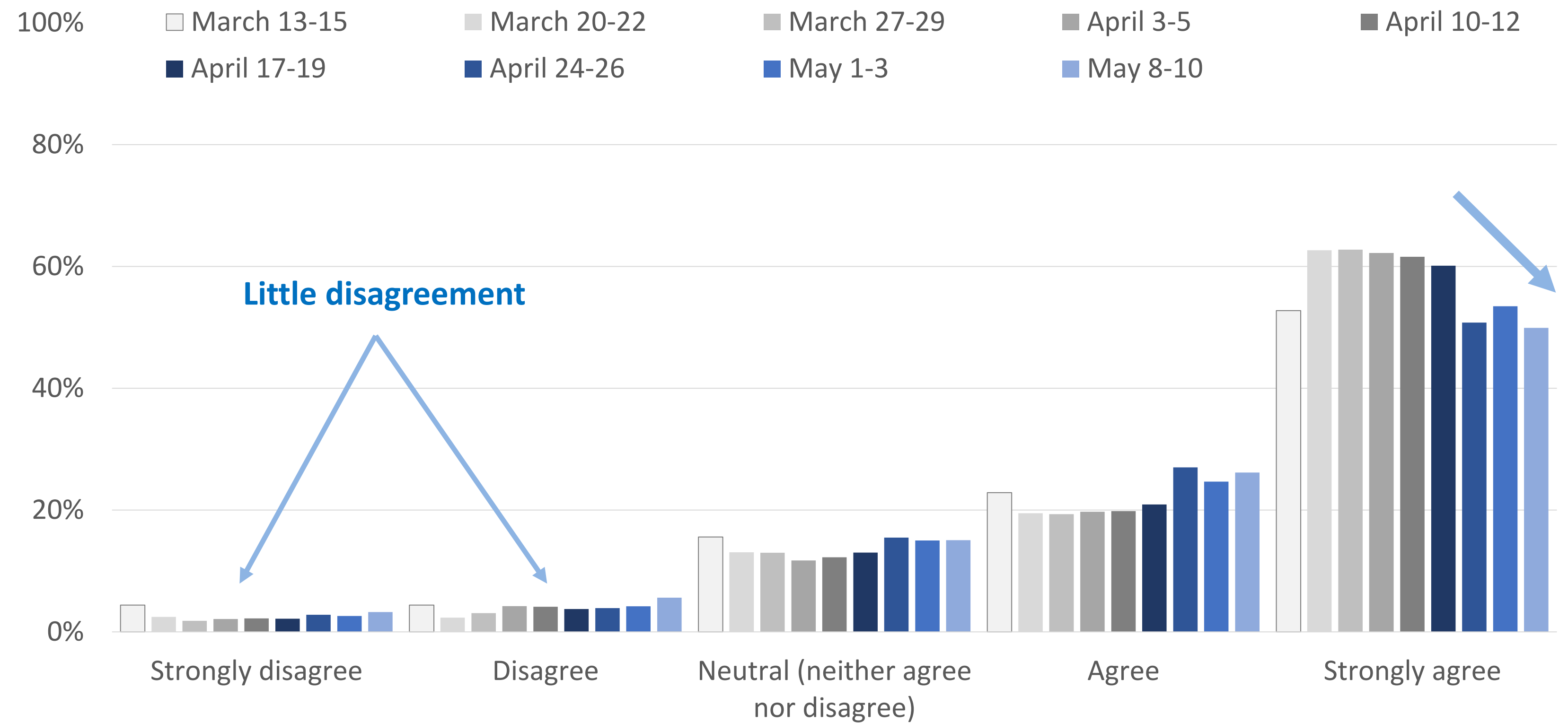
Avoiding International Travel

A majority (76.1%) still say they are unlikely to travel abroad until the coronavirus situation is resolved—down slightly from last week at 78.2 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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



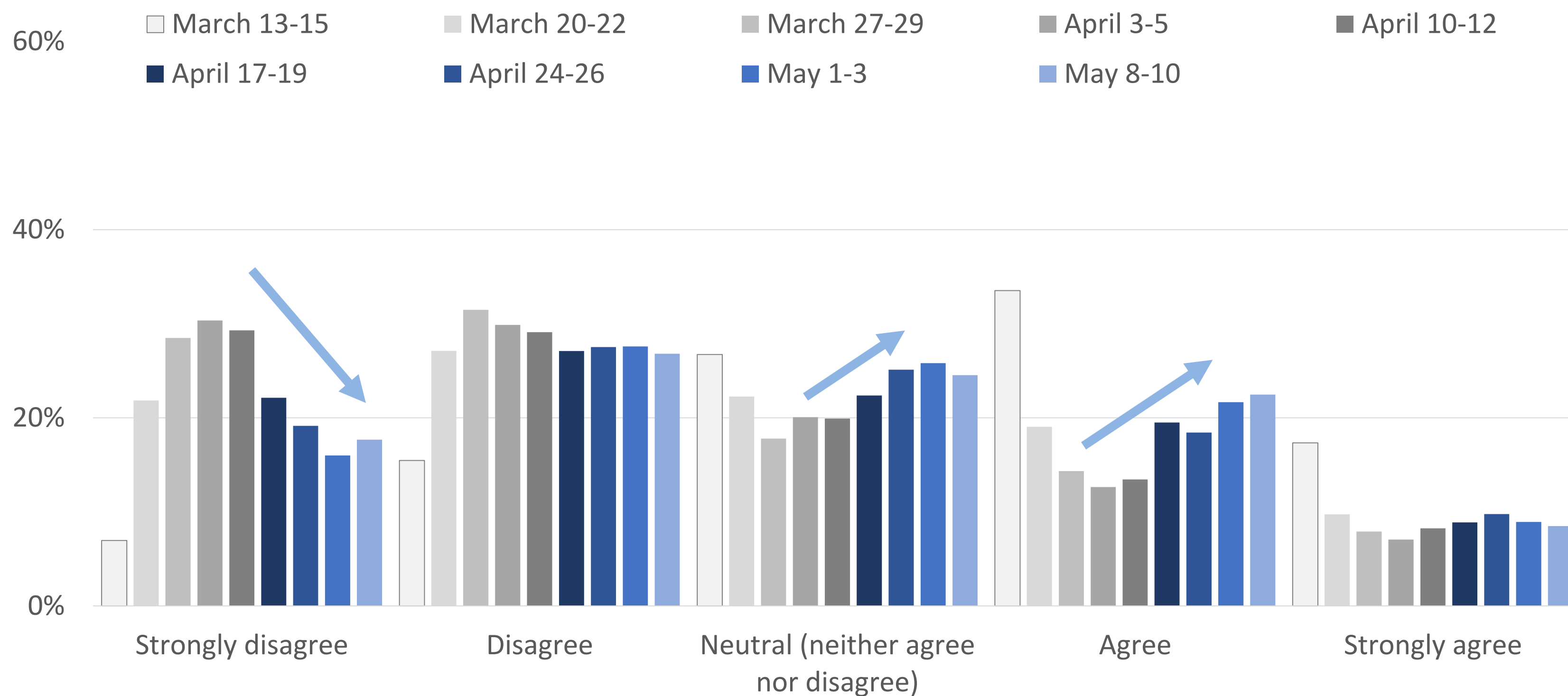
Comfort Enjoying Home Community

American travelers are still largely uncomfortable about going out in their own communities to enjoy themselves. Less than a third (31.0%) say they are comfortable going out in their community (similar to 30.6% last week).

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



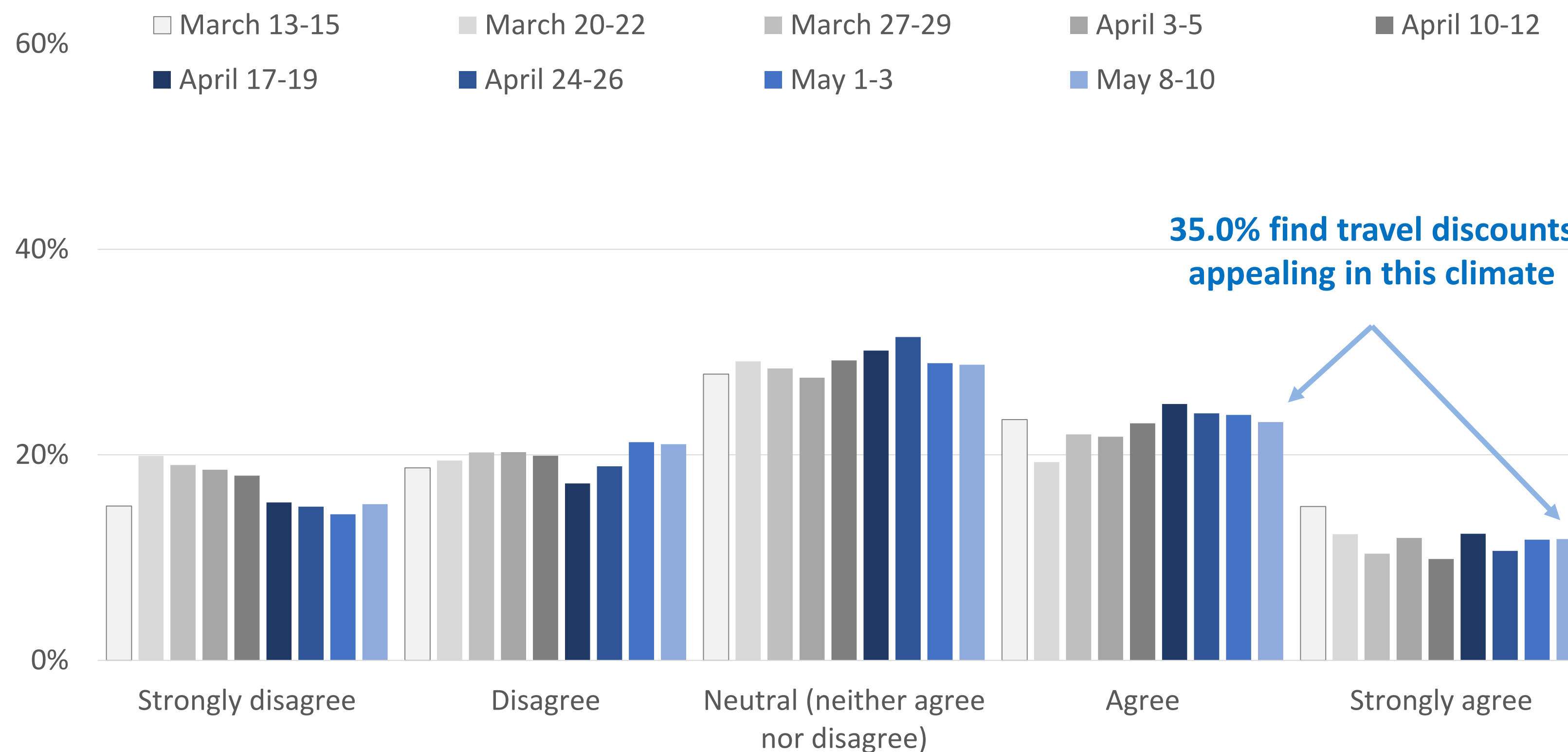
Discounts and Price Cuts

Price cuts resonate with over a third of American travelers. When asked if price cutting made traveling in the next three months more interesting, 35.0 percent agree (unchanged from last week at 35.6%).

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, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



Supporting Local Businesses

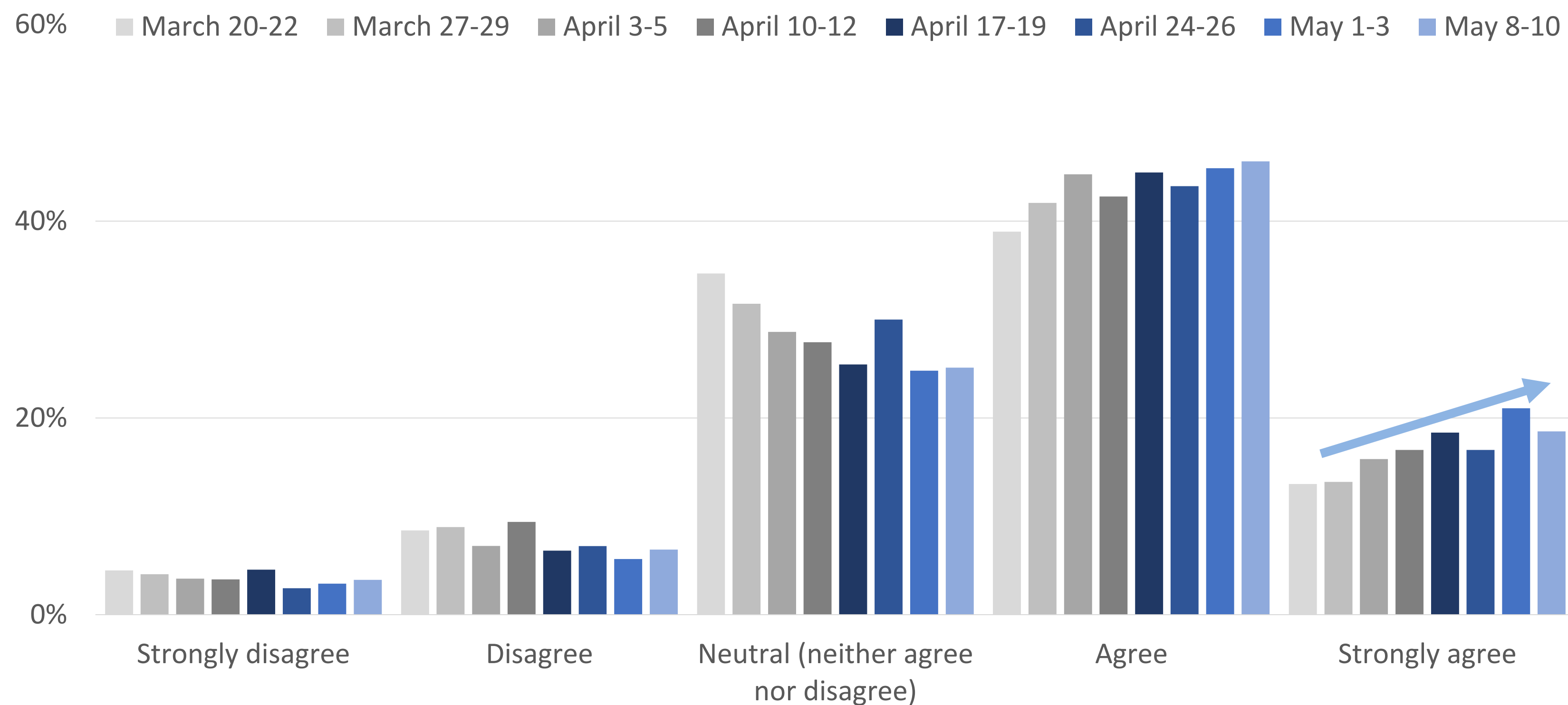
Nearly two-thirds (64.7%) of American travelers say they have been taking action to try to support local businesses where they live (down slightly from 66.4% last week).

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, 1,204 and 1,200 completed surveys. Data collected March 20-22, 27-29 April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

Question Added in Wave 2



Travelers in Community are Unwanted

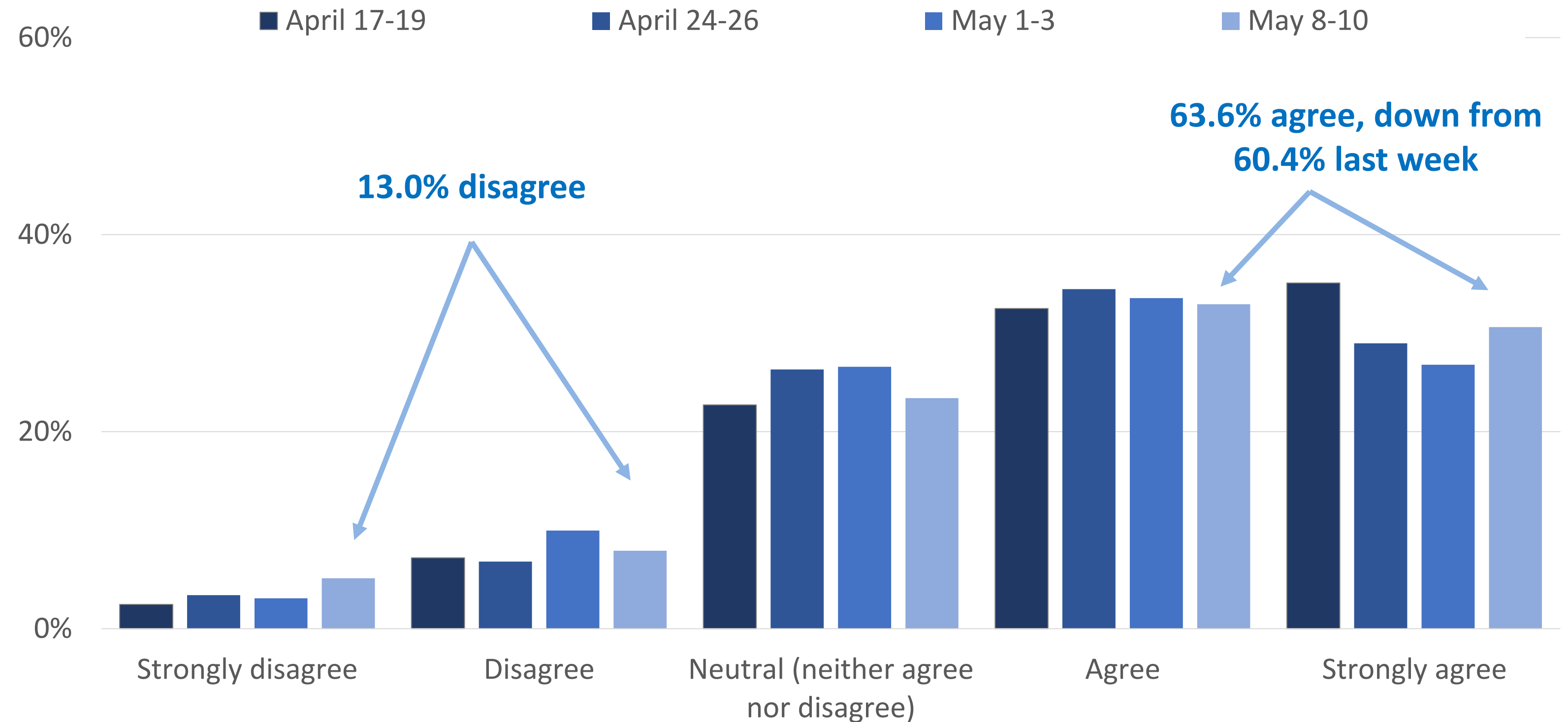
American travelers largely do not want other travelers visiting their communities in the current environment. Now, 63.5 percent agree with this sentiment (up from 60.4% last week). Only 13.0 percent disagree.

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, 1,204 and 1,200 completed surveys. Data collected April 17-19, 24-26, May 1-3 and 8-10, 2020)

Question Added in Wave 6



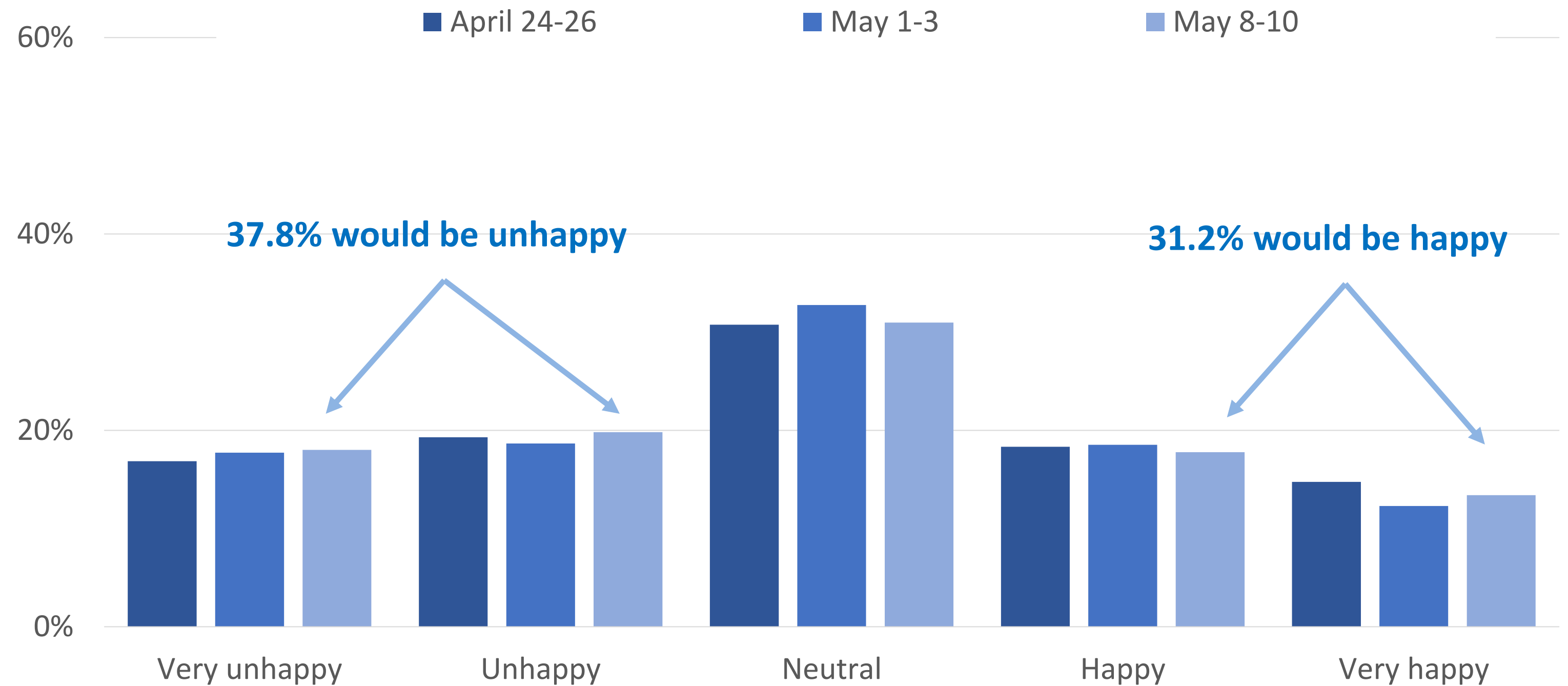
On Seeing Advertisements for Their Home Communities

Opinions continue to be split on whether destinations should currently be marketing respondents' home communities—even for travel after the pandemic is over. While 31.2 percent said they would be happy to see such an advertisement (up slightly from 30.8% last week), 37.8 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, 1,204 and 1,200 completed surveys. Data collected April 24-26, May 1-3 and 8-10, 2020)

Question Added in Wave 7



Won't Travel Without Vaccine

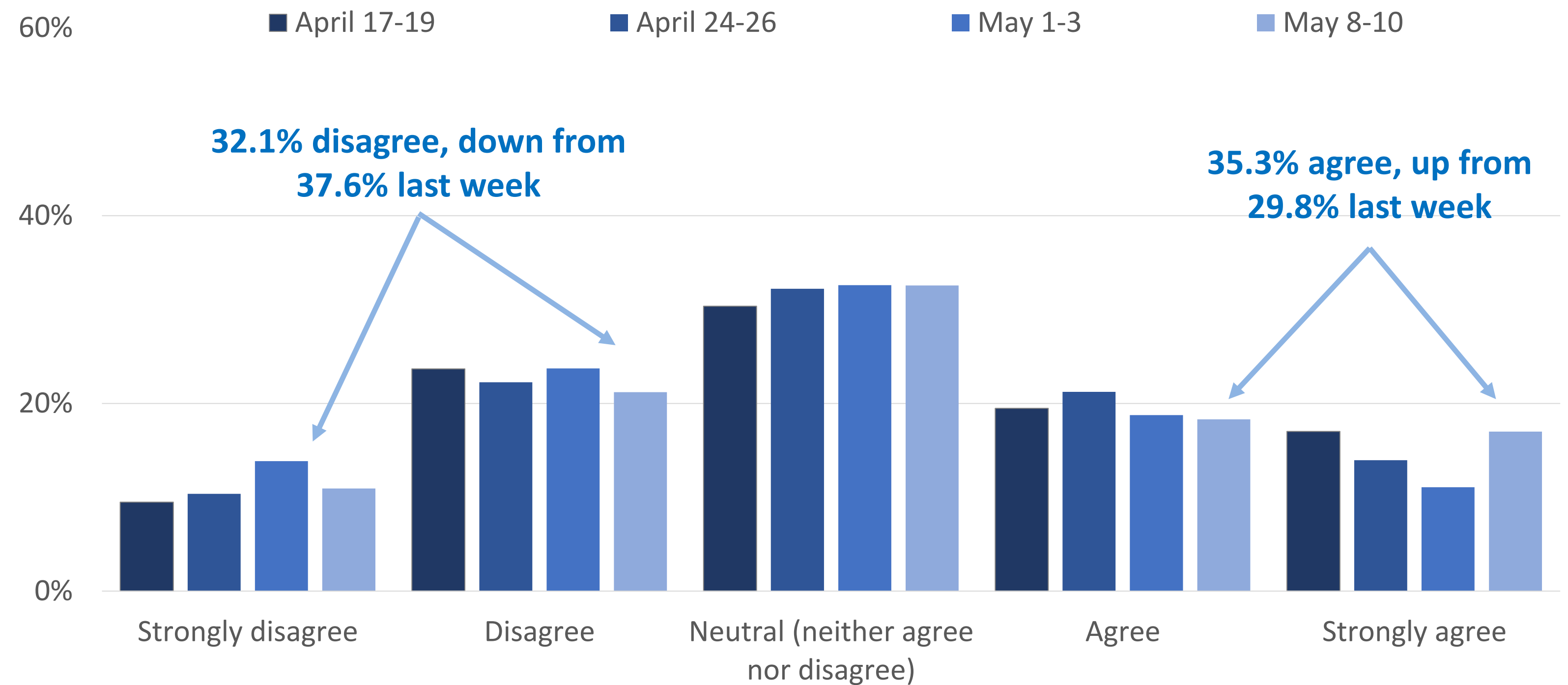
This week, over a third of American travelers say they will not be traveling until a Covid-19 vaccine is developed. 35.3 percent agree with this sentiment (up from 29.8% last week). However, 32.1 percent currently reject this idea (down from 37.6% last week).

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, 1,204 and 1,200 completed surveys. Data collected April 17-19, 24-26, May 1-3 and 8-10, 2020)

Question Added in Wave 6



Comfortability with Home State Re-Opening

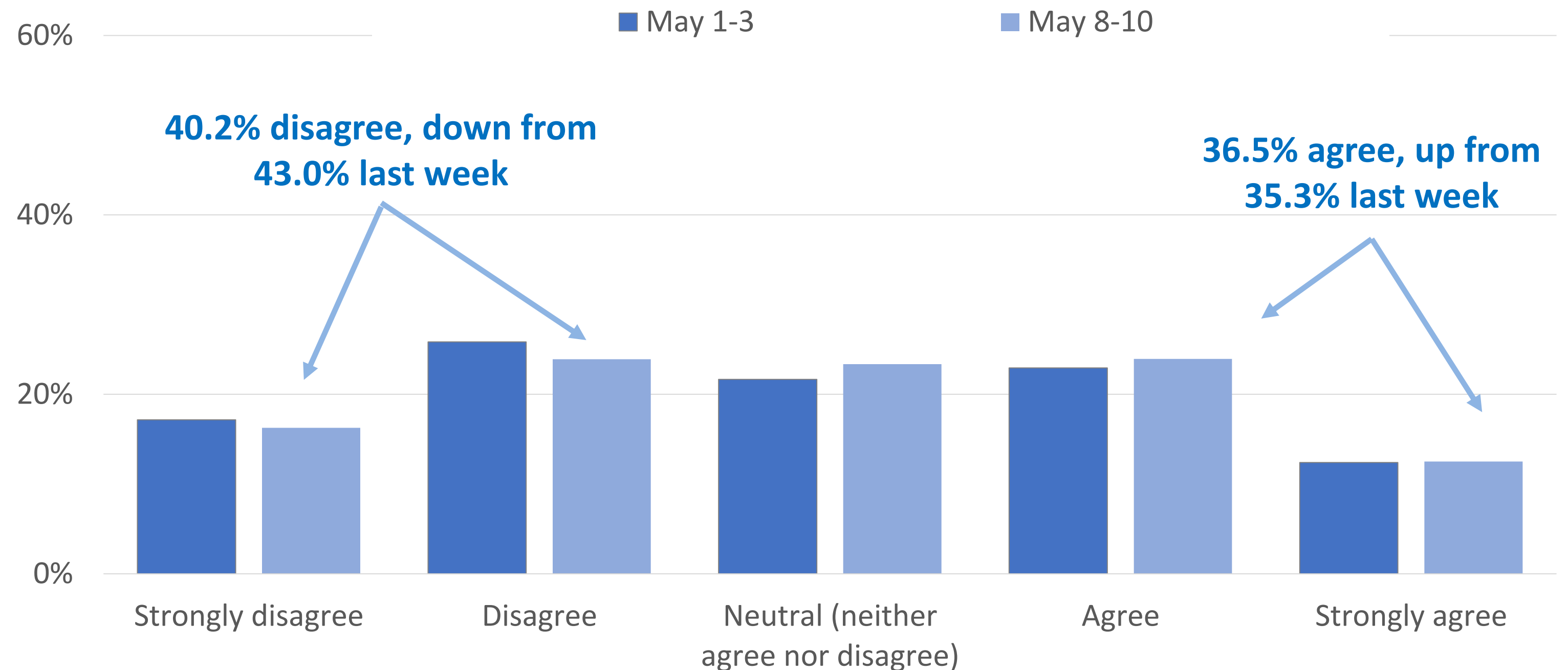
Opinions are split on whether states should be reopening now. This week, 36.5 percent of American travelers say they are comfortable with their home state re-opening its economy, but a slightly larger proportion (40.2%) are not comfortable with this.

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 and 1,200 completed surveys. Data collected May 1-3 and 8-10, 2020)

Question Added in Wave 8





Coronavirus Travel Sentiment Index

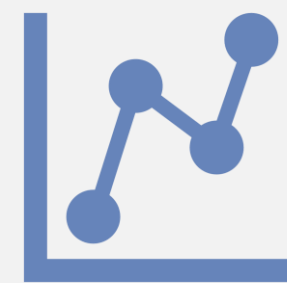
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 11th

What is a Predictive Index?



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



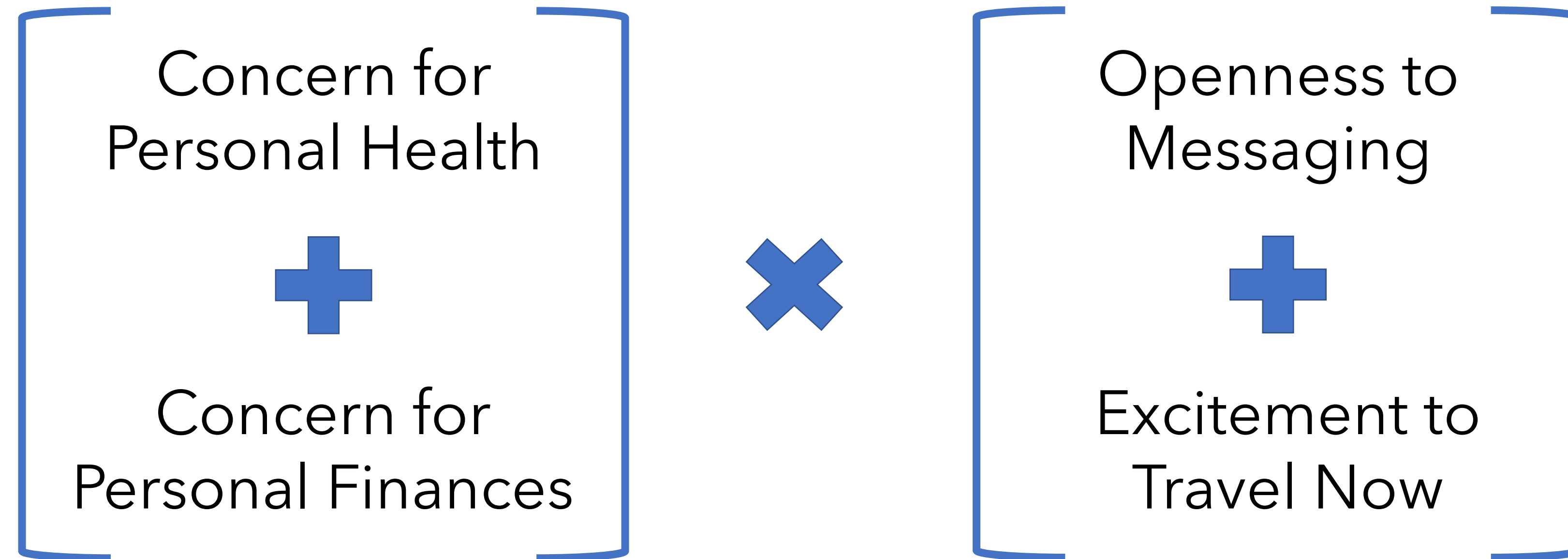
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

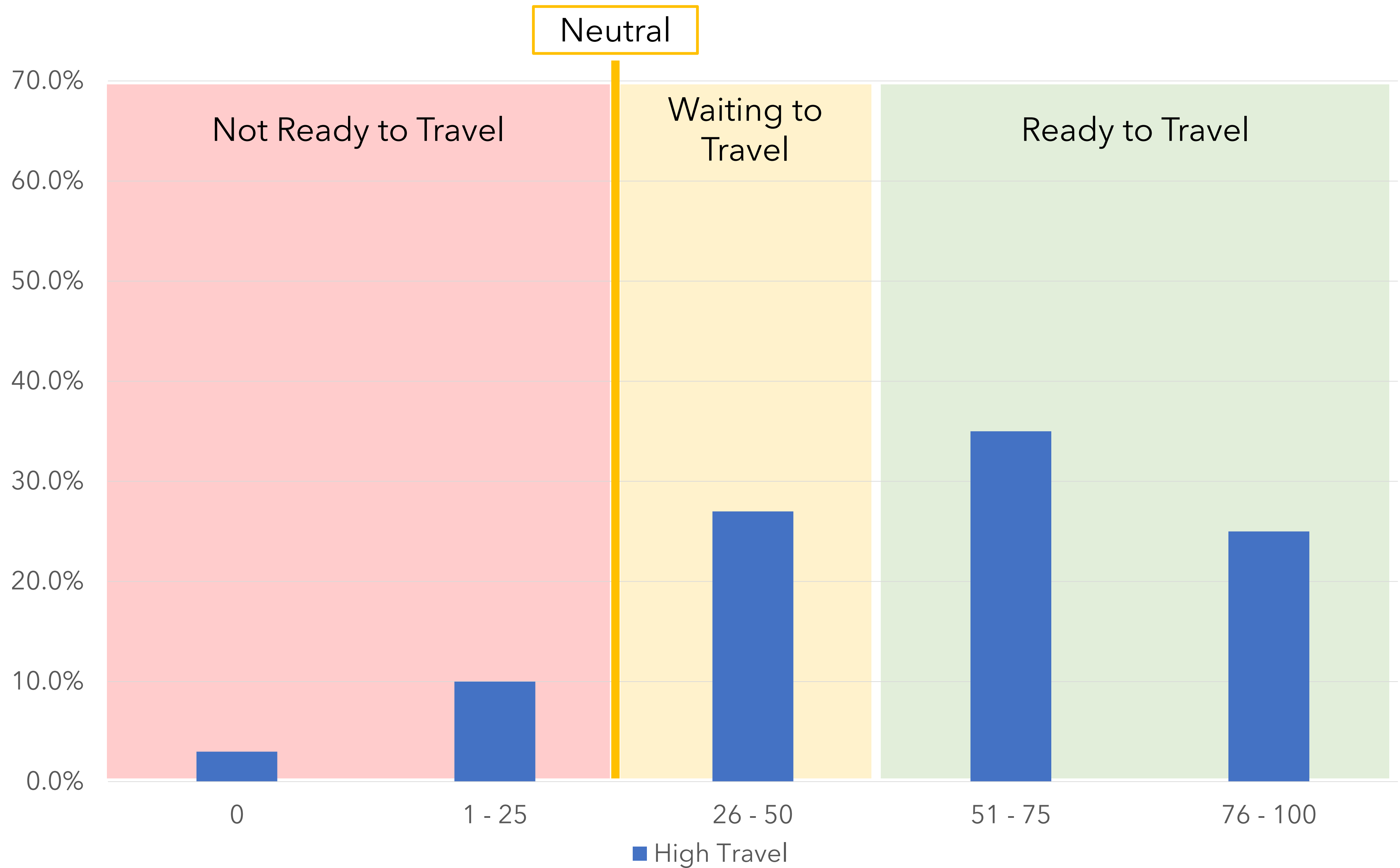
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

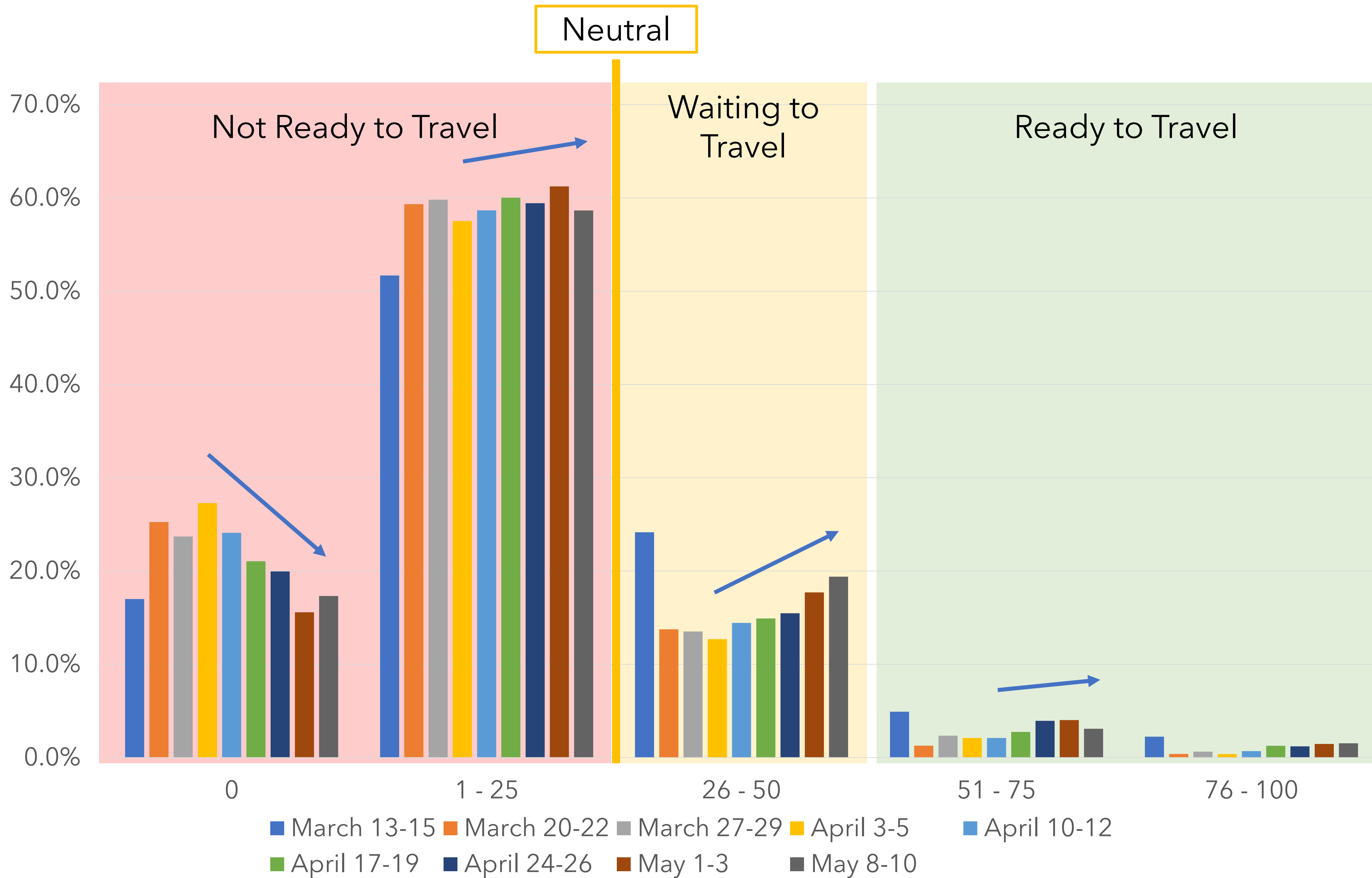


*Normalized to a 100pt scale

Healthy Travel Outlook



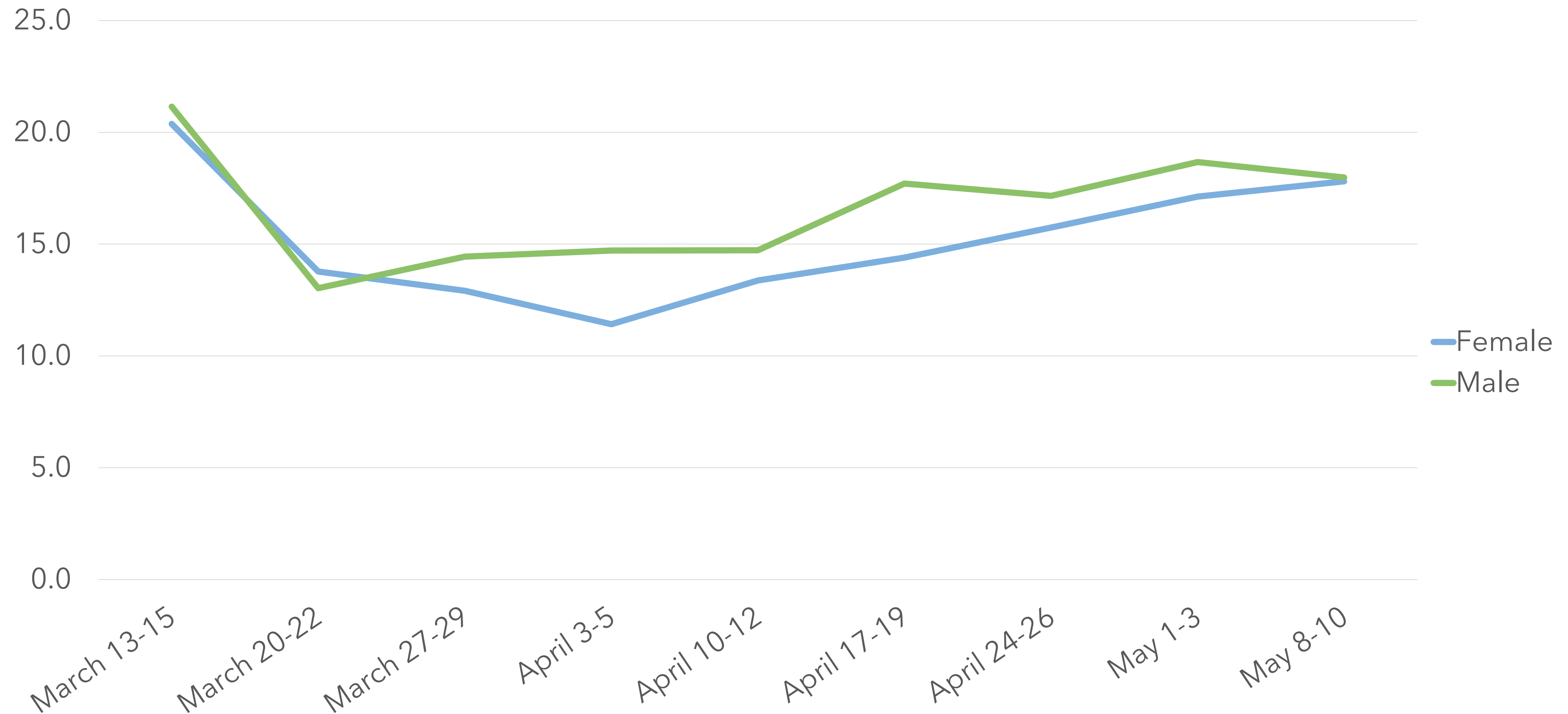
Travel Outlook: Week of May 11th



Gender

Points of Interest Impacting Index Scores:

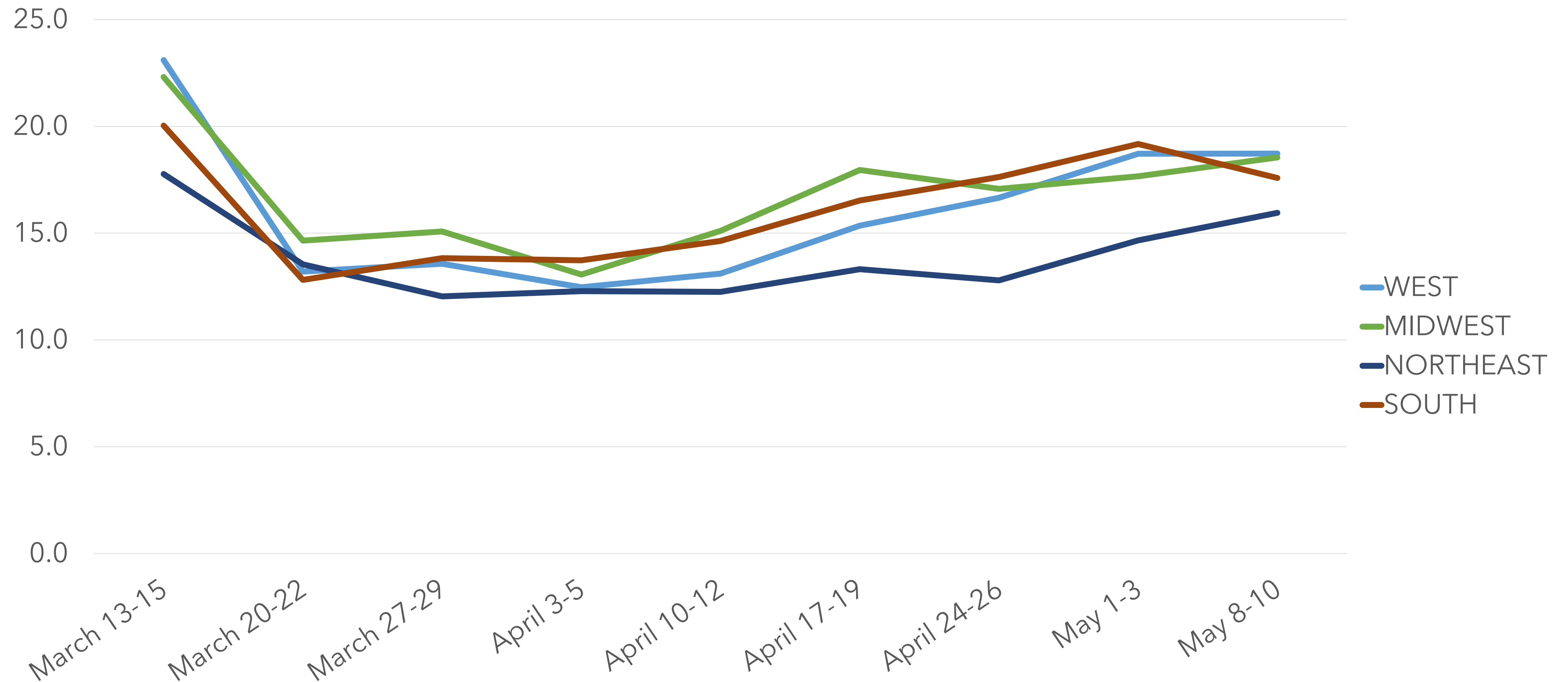
- Men and Women reported near identical levels of both safety and financial concerns this week as well as similar levels of excitement to travel.
- Men more likely to say they will “Jump right back in” to travel in the period right after the coronavirus. (14.1% vs 8.9% for women)



US Region

Points of Interest Impacting Index Scores:

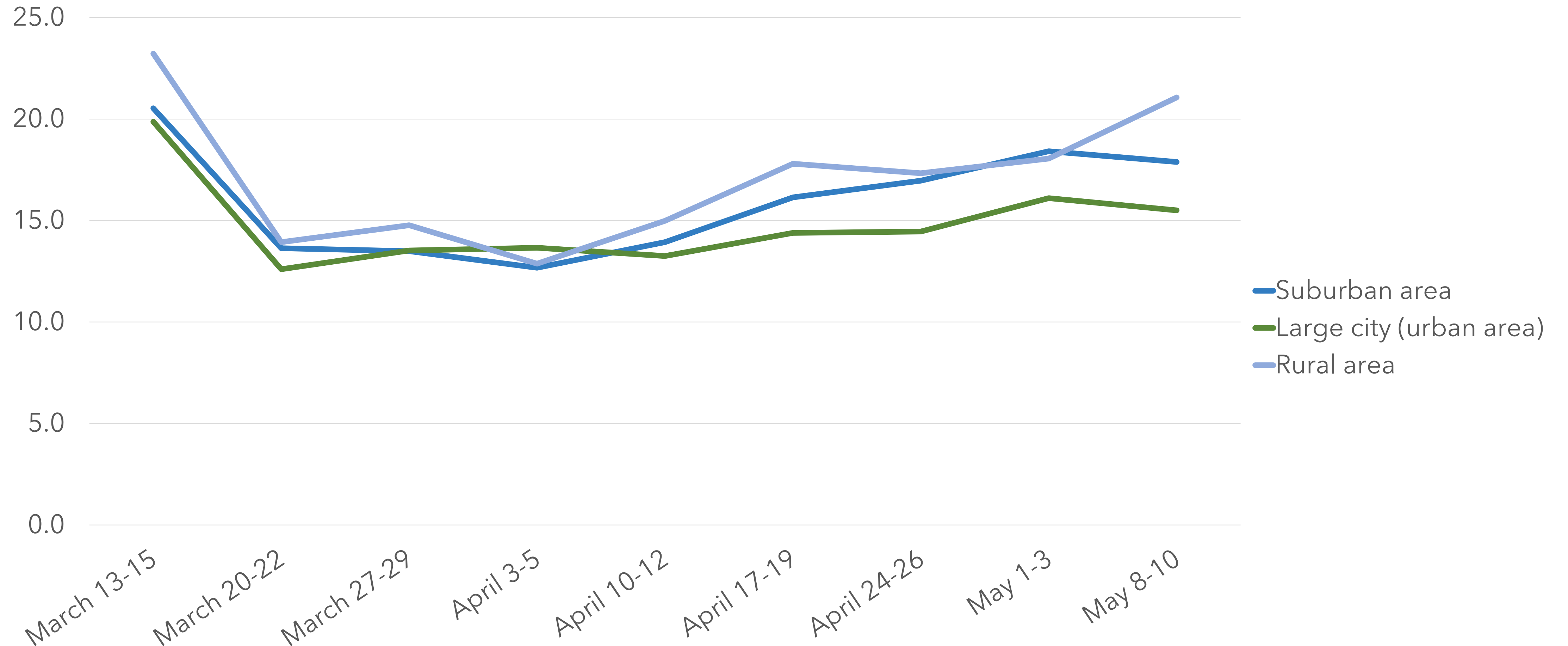
- Northeast continued to report the highest levels of personal concern for contracting the virus this week, consistently higher than other regions
- Even so, the Northeast this week showed the most optimism that the Coronavirus situation will get better or much better in the next month
- The South reports being most excited about traveling, while the West reports being most open to messaging this week



Type Of Residence

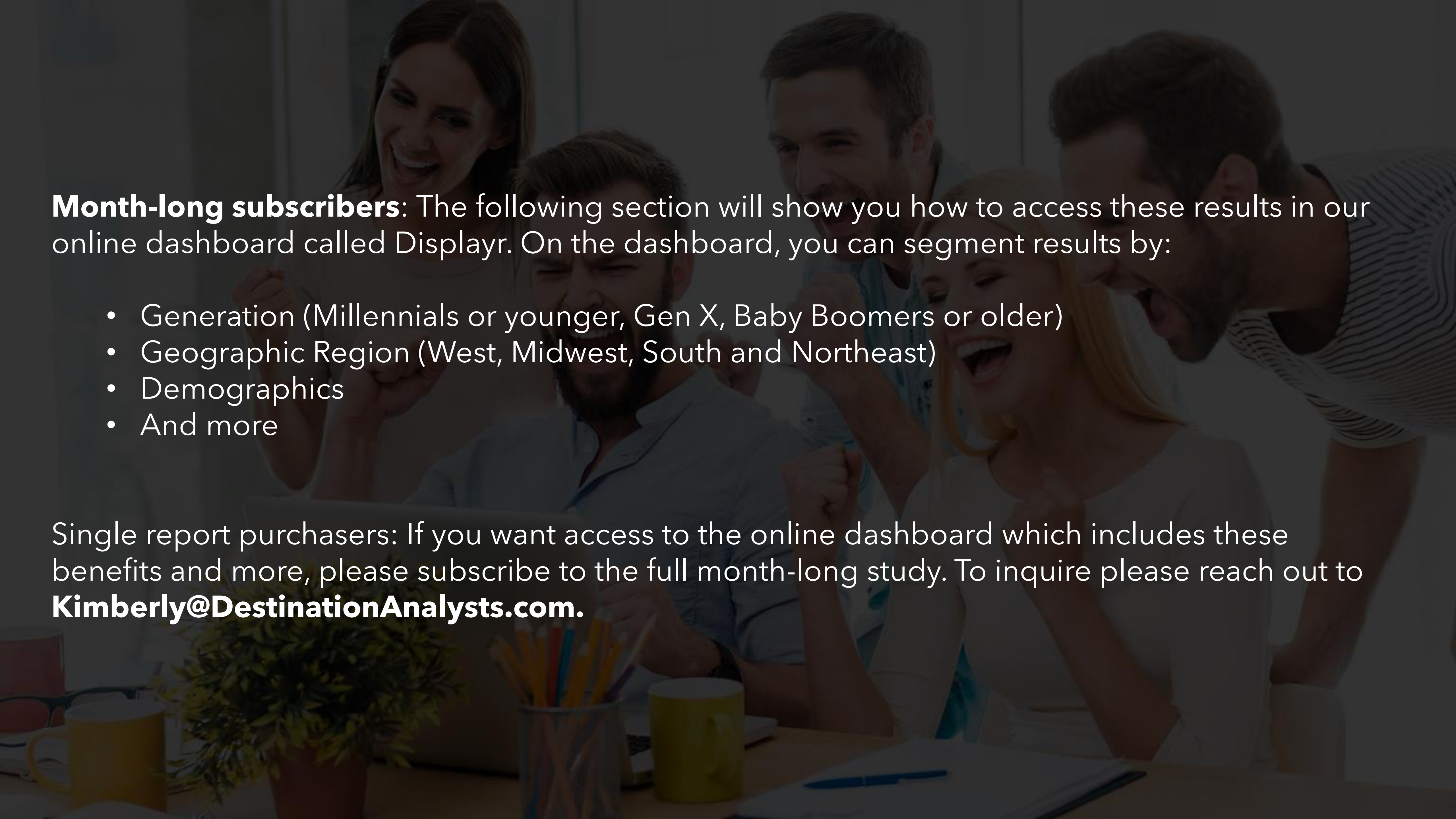
Points of Interest Impacting Index Scores:

- Large city/urban respondents report significantly higher levels of concern with both safety and finances than rural respondents this week.
- Even with higher levels of concern, urban respondents and rural respondents report similar levels of excitement to travel and open-ness for messaging.





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:

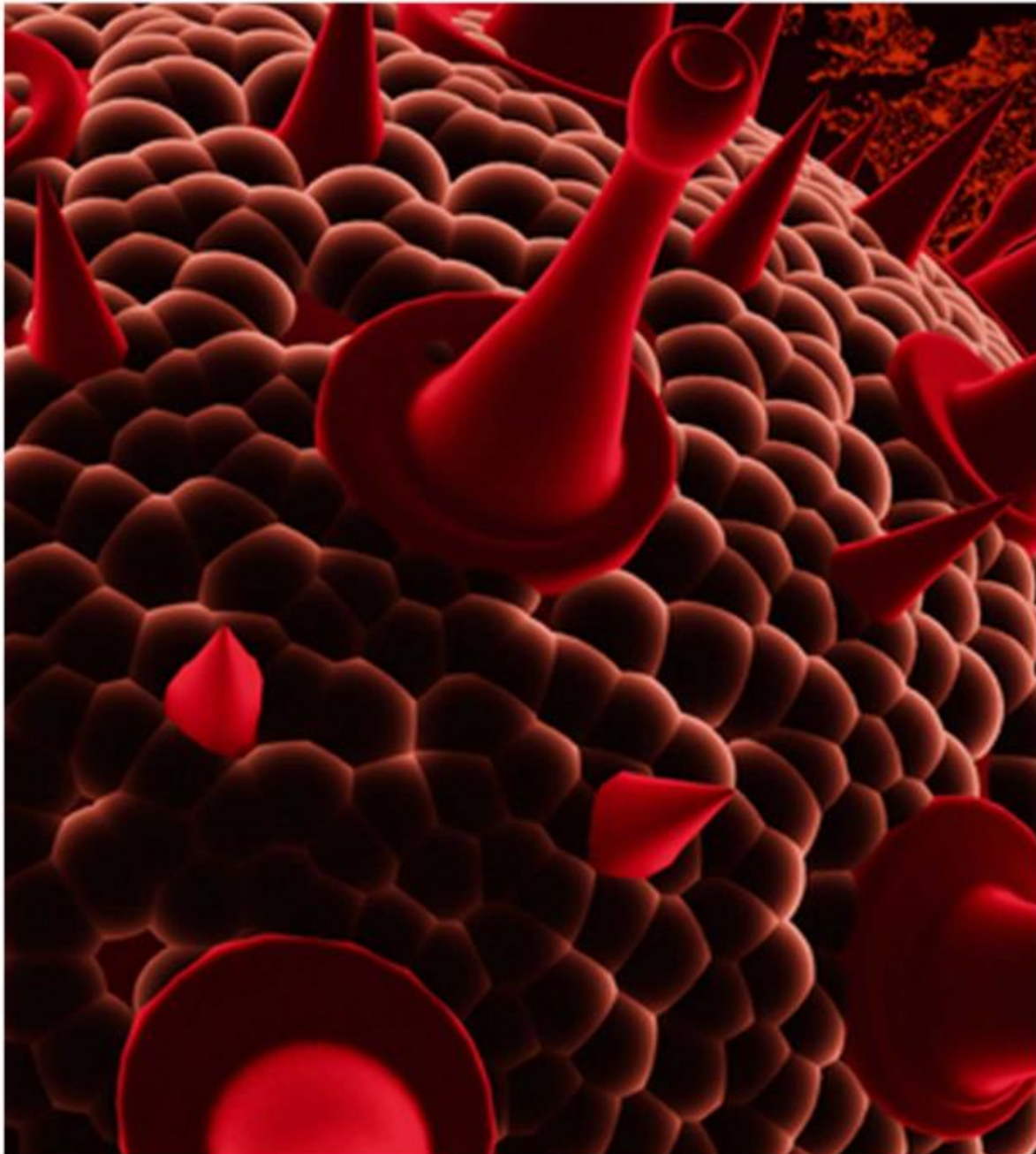
Toggle between the report sections by clicking on the header(s) in this navigation pane

Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ?

Search... 65%

- 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

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



FILTERING THE REPORT:

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



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

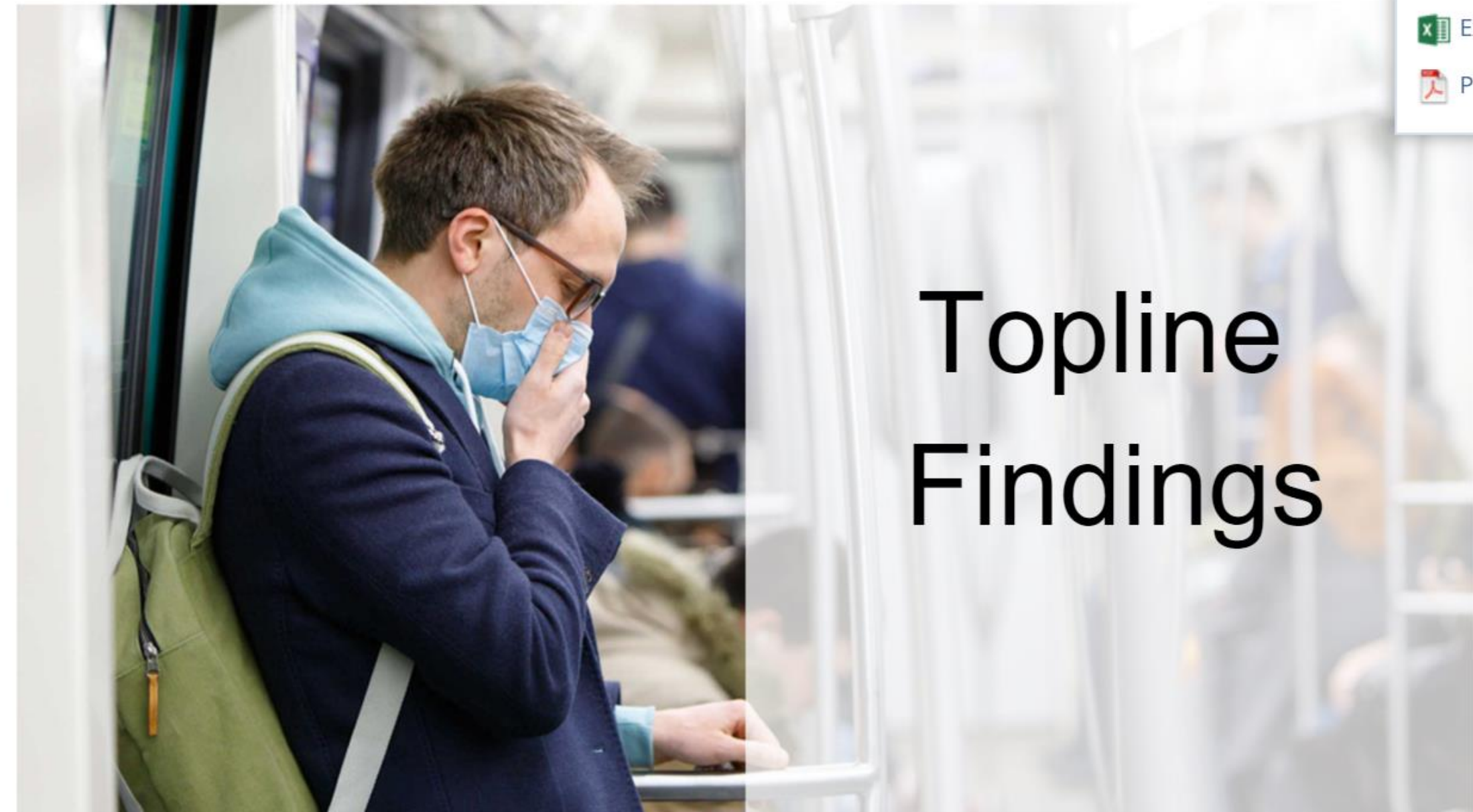
EXPORTING THE DATA:

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

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

Coronavirus Travel Sentiment Index Report

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



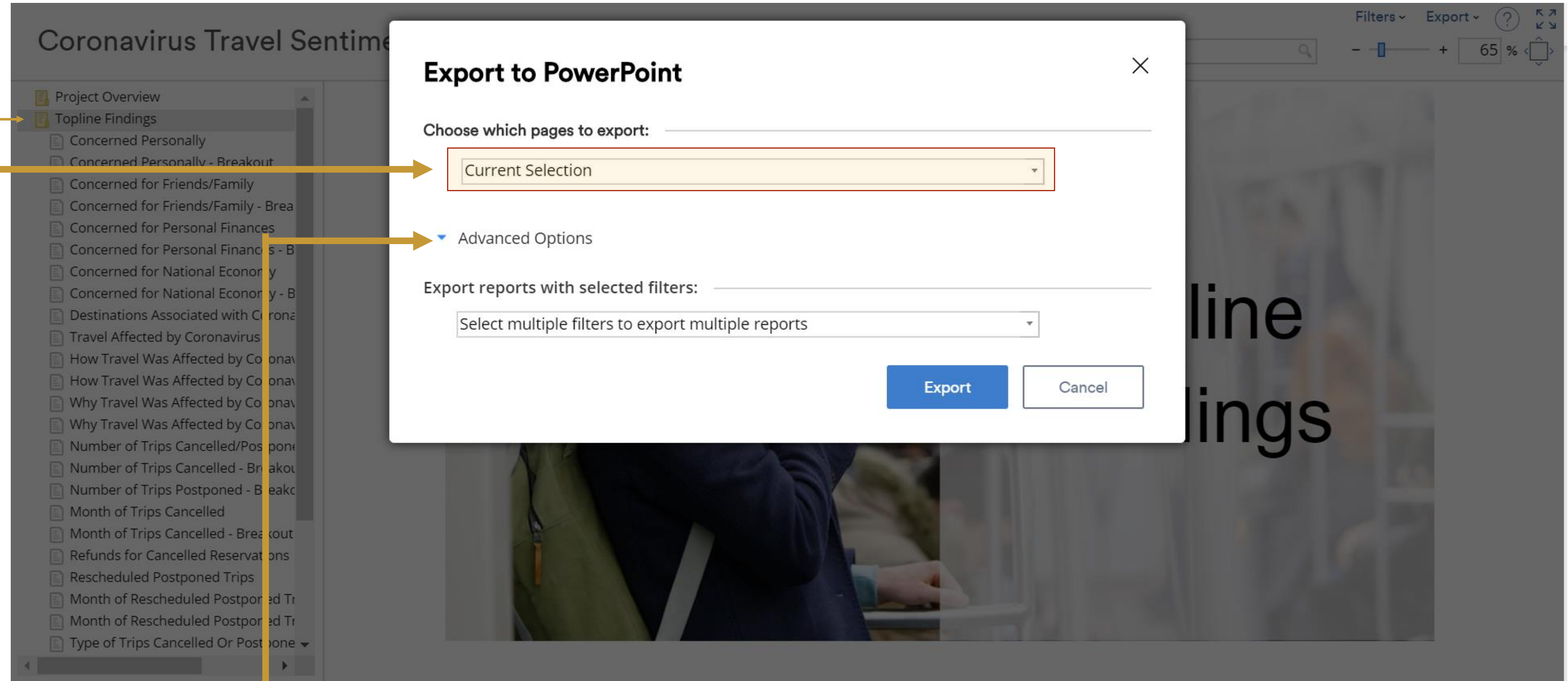
Topline Findings

EXPORTING THE DATA:

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

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

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



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

NEED MORE HELP?

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

Chingun Ganzorig

Research Manager

Chingun@DestinationAnalysts.com

(415) 722-2503

