# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 17

## RESEARCH FINDINGS

July 6, 2020

Destination Analysts

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# Project Overview

The goal of this research is to understand and track the widespread disruption and damage to the travel and tourism industry caused by the coronavirus. To do so, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the 17th wave of this project are presented in this report. The survey is being 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 17th wave of this survey was collected from July 3-5, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,365 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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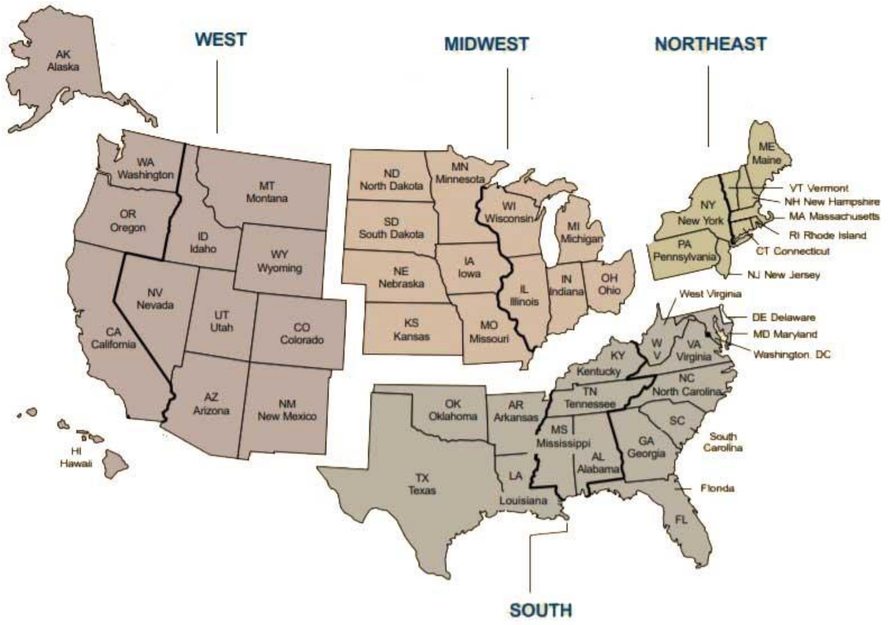
# Project Overview

**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 below. 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 have been, or will be, made on the following schedule at right.

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 |
| Wave #13 | June 5-7 | June 8 |
| Wave #14 | June 12-14 | June 15 |
| Wave #15 | June 19-21 | June 22 |
| Wave #16 | June 26-28 | June 29 |
| Wave #17 | July 3-5 | July 6 |
| Wave #18 | July 10-12 | July 13 |
| Wave #19 | July 17-19 | July 20 |
| Wave #20 | July 24-26 | July 27 |

# Key Findings

In this 17th wave of this consumer sentiment project, the following key findings emerged:

- During the Independence Day weekend, 16.5 percent of American travelers report having taken a trip. These travelers were more likely than others to be male, Millennials, residents of urban areas, have slightly higher incomes, stay in upscale hotels and have persons with a disability in their typical travel parties.

- Traveler concerns about contracting the coronavirus remain elevated. Now, 72.1 percent of survey respondents say they have some level of concern about contracting the virus, up slightly from 71.3 percent last week. Concerns about the health of friends and family also remain high, with 74.9 percent expressing concern for the safety of their loved ones, down from 77.2 percent last week.

- Worries that coronavirus will impact Americans' personal finances slightly decreased from 60.1 percent last week to 58.3 percent this week. Concerns about the nation's overall economic performance remain high. 84.4 percent of travelers expressed some level of concern for the national economy.

- Traveling on a cruise continues to be seen as the least safe travel activity. Traveler ratings of the safety of various travel activities reverted this week. In this most recent survey wave, the proportion of travelers rating each activity as either "Somewhat unsafe" or "Very unsafe" reversed its trend and increased slightly.

# Key Findings

- Concerns that the severity of the pandemic will get worse in the next month shifted negatively this week. 63.0 percent of American travelers expect the coronavirus situation to get worse in the next month, up from 60.6 percent last week.

- Interest in short trips increased this week. Just under half of travelers surveyed (46.7%) 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 slightly from 44.4 percent last week.

- Travelers' interest in learning about new experiences and destinations decreased slightly this week. In total, 42.3 percent of American travelers surveyed expressed some level of excitement about the topic.

- Florida is now the most talked about destination with coronavirus issues. Approximately 60 percent of survey respondents identified Florida as one of the three most talked about places, surpassing New York as the most talked about destination for the first time.

- Nearly 40 percent of American travelers say they will avoid destinations they would normally consider visiting for the remainder of the year.

# Key Findings

- Over half of travelers who will not visit specific destinations due to coronavirus say it will be in the second half of next year or later before they will consider such destinations again.

- One-in-five American travelers say they have a specific destination in mind to visit for leisure in 2020.

- Americans who already have a destination(s) in mind for their 2020 leisure travel plans continue to show an affinity for beaches (42.0%). Over a third of these travelers say they will visit a city this year and similarly, 32.0 percent say they will visit a small town or rural area.

- Approximately 30 percent of American travelers reported that they are likely to consider a leisure trip that they haven't already considered if a good opportunity was presented in the next three months.

- This week, 76.6 percent of American travelers reported having had their travels impacted by the coronavirus.

- This week, the percentage of American pandemic-affected travelers reporting they have cancelled trips due to the coronavirus is 68.1 percent.

# Key Findings

- Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with over two-thirds of respondents citing it as a reason (67.1 percent—up from 64.6 percent last week).
- The average American traveler who cancelled a trip has done so for 2.1 trips as a result of the outbreak. Meanwhile, the typical traveler has postponed 1.8 trips due to the crisis.
- The proportion of travelers who were fully refunded for cancelled trips decreased to 69.9 percent this week.
- About two-thirds of American travelers who have postponed a trip due to the pandemic have not yet rescheduled it.
- Only 13.9 percent of American travelers expect they will take their next road trip this month. On average, they will likely travel 311 miles away from home on their next road trip.
- American travelers' next commercial airline trip is further into the future than their next road trip, with 30.3 percent who plan to take an airline trip sometime later in 2021. They plan to travel an average of 1,041 miles away from home on their next air trip.

# Key Findings

- When American travelers were asked about the operational practices that would make them feel most confident that the hotel is looking out for their health, hotel employees wearing masks and gloves topped the list. They also want the cleaning procedures clearly communicated, socially distancing enforced, and to be provided with hand sanitizer and masks.

- When it comes to the services they will use the next time they stay in a hotel, half or more of American travelers reported that they are likely or very likely to use housekeeping and mobile check-in.

- The fitness center, breakfast buffet restaurants, spa and pool are the hotel features that Americans are less likely to use during their next hotel stay as a result of the coronavirus situation.

- 13.0 percent of American travelers have taken an overnight ski or snowboard vacation in the past three years. In total, 17.5 percent of American travelers reported that they are likely or very likely to take an overnight ski or snowboard vacation in the next three years.

- While one-in-five Americans would feel safe taking a ski or snowboard vacation in the next Winter season (19.0%), more than double would feel unsafe (41.8%).

# Key Findings

- One-in-ten respondents regularly visit a specific destination for ski/snowboard-related trips.
- Two-thirds of those who regularly visit a specific ski/snowboard destination are likely to take an overnight ski trip to that destination next season (67.6%).
- At this point in time, it appears that December, January and February will be the months in the upcoming season with the highest volume of American traveler ski/snowboard vacations.
- Road trips dominate the mode of transportation used by American ski/snowboard travelers, yet nearly 40 percent will likely travel by plane this season for such a trip.
- American travelers appear to be more interested in their current destinations than finding new ones. Only 21.0 percent said they were interested or very interested in visiting new destinations.
- Over half of Americans would feel happy if a destination they wanted to visit was issuing fines to those who do not wear face masks in public.

# Key Findings

- 27.5 percent of American travelers would feel happy if they saw an ad promoting their community as a place for tourists to visit, down from 35.8 percent last week.

- Unchanged from the last two weeks, over half of Americans still feel that too many in their community are not wearing masks in public. This week, 55.7 percent agree with this sentiment while 20.0 percent disagree.

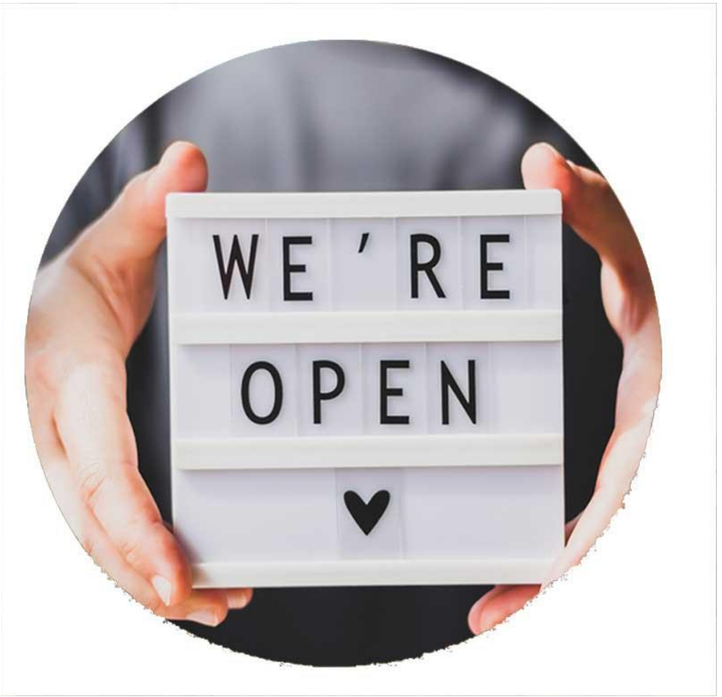
- An even larger proportion of Americans agree that too many people in their community are not maintaining appropriate social distancing while in public (61.2%).

- Up significantly from last week, 59.2 percent of Americans now say they are done traveling until the coronavirus situation blows over.

- Americans' optimism for travel to return in the Fall continues to decline. Now, 36.2 percent expect to be back traveling this Fall (down from 39.7% last week).

- Expectations that the coronavirus situation will be resolved before Fall remain low. Now just 15.7 percent agree it will be resolved by then, while two-thirds (64.2%) disagree.

# Key Findings




- Staycations replacing vacations this summer increased again this week. Now, 58.9 percent of American travelers agree they'll probably take a staycation rather than a vacation this summer (up from 56.0% last week).

- Largely unchanged for the last seven weeks, 43.9 percent of Americans say car travel may displace some of their air travel this year.

- Half (53.1%) of American travelers still say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus.

- The likelihood of American travelers attending meetings in the current environment remains low.

- The likelihood of American travelers traveling abroad in the current environment remains low.

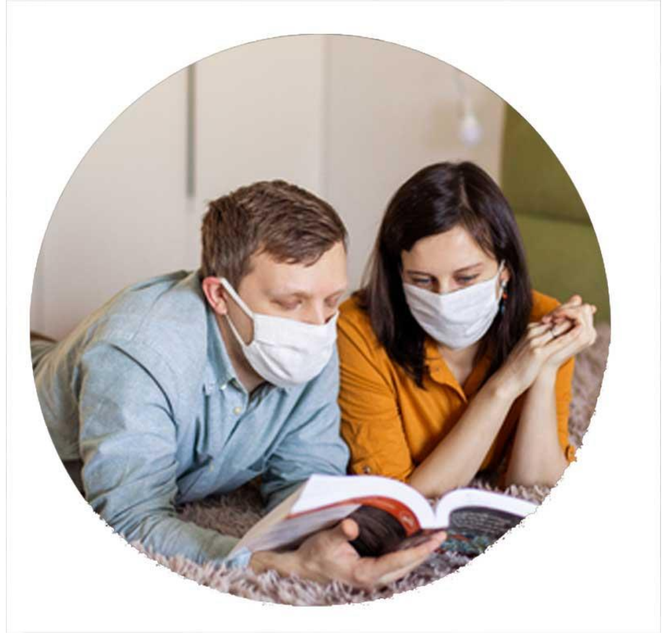
- Americans are reversing course on their comfortability with going out in their own communities. Now, 36.6 percent say they are comfortable undertaking local activities while 39.6 percent are uncomfortable.

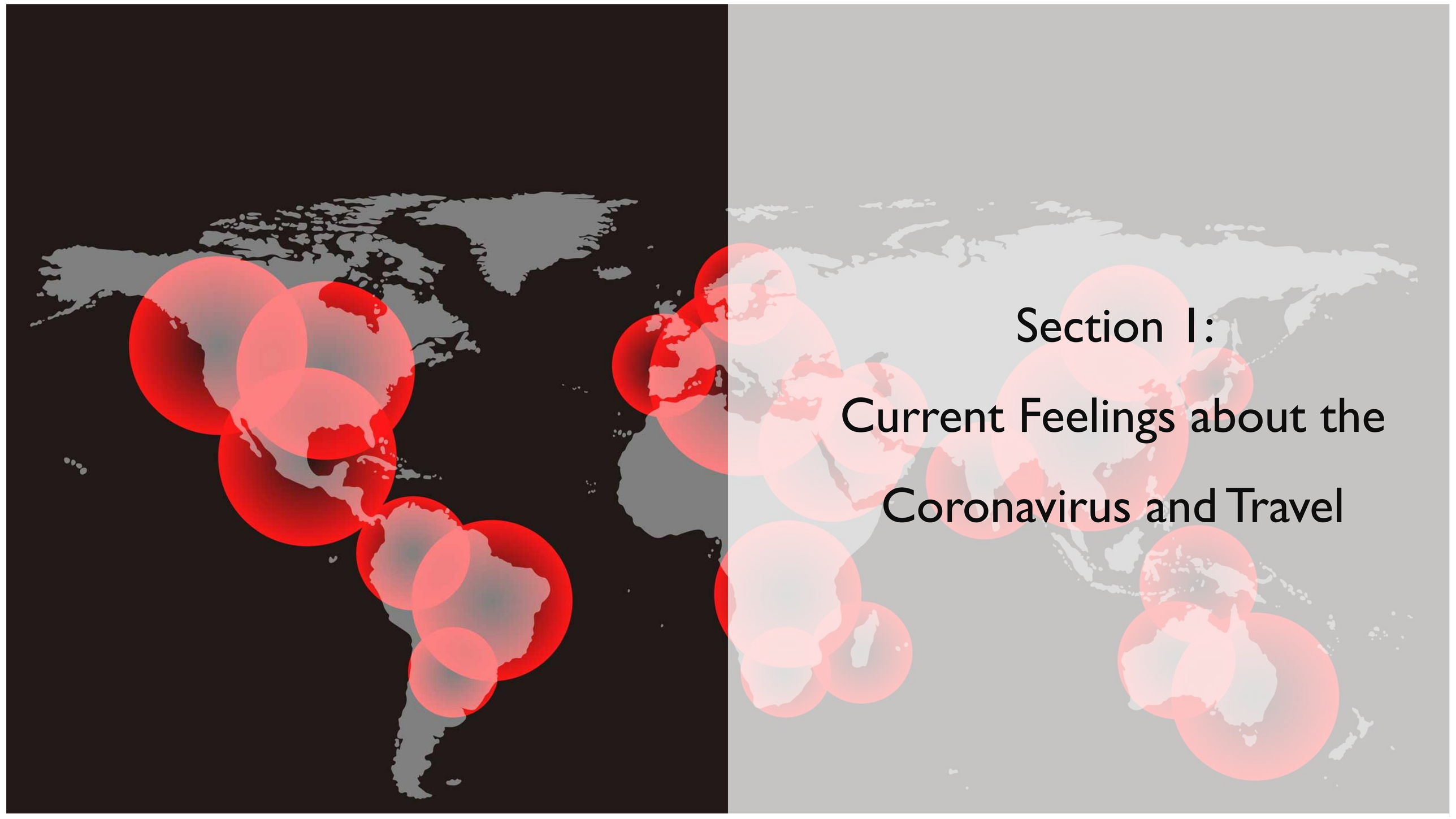
# Key Findings

- In the current environment, price cuts appear to have lost their luster. When asked if price cutting made traveling in the next three months more interesting, 33.8 percent now agree (down from a high of 39.3% one month ago).

- American travelers still largely do not want other travelers visiting their communities right now. In total, 60.0 percent agree with this sentiment. Only 13.2 percent disagree.

- At a 12-week high, now 44.1 percent of Americans say they will not travel until a COVID-19 vaccine is available. 28.5 percent reject this which is also at a 12-week low.



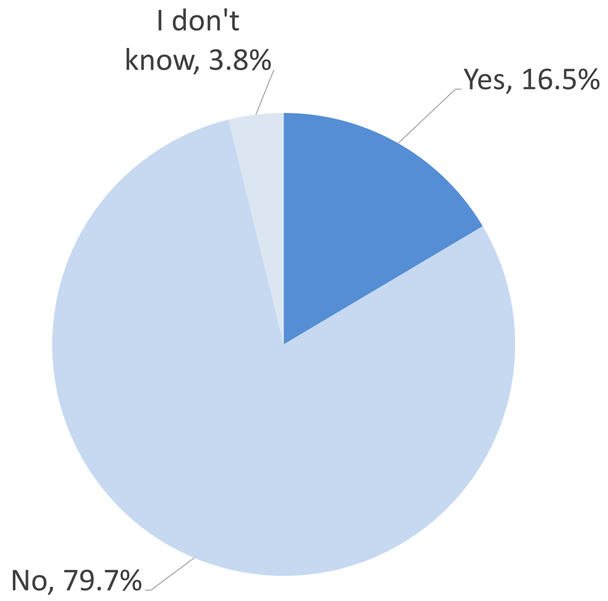


# Section 1:

# Current Feelings about the Coronavirus and Travel

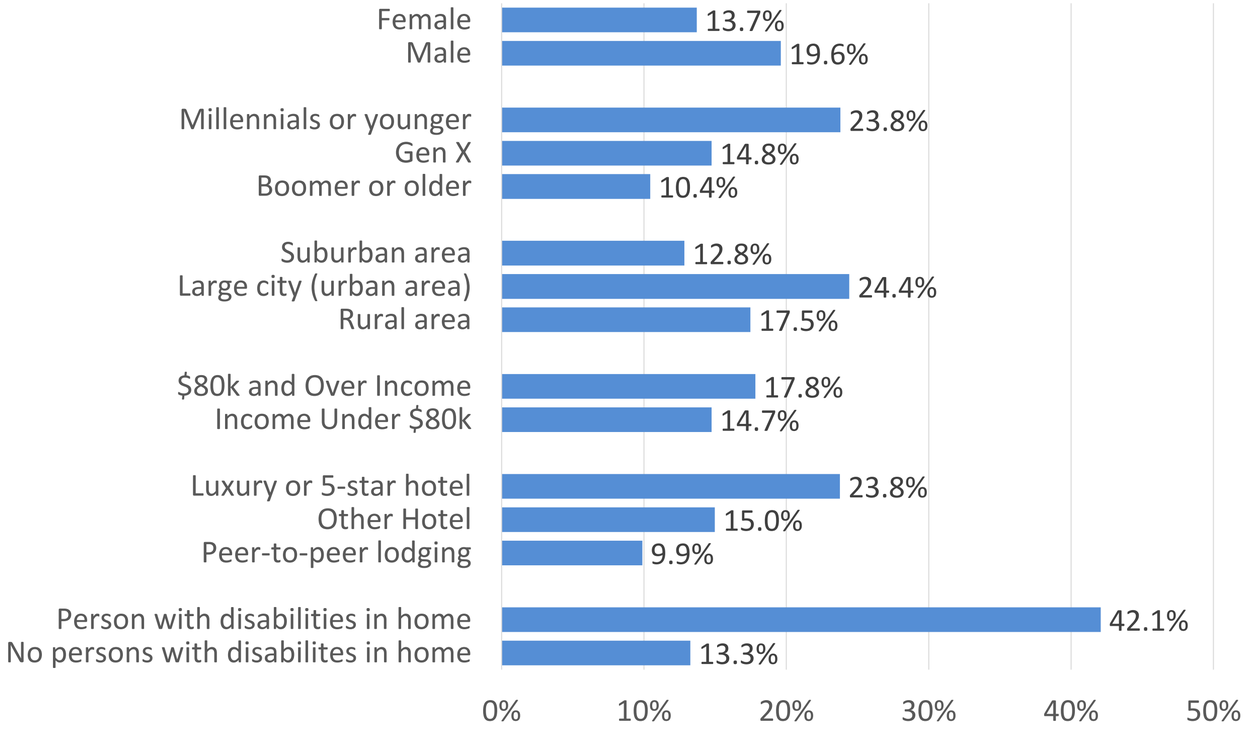
# Travel on the Fourth of July Weekend

**Question: Are you (or will you be) traveling during the Fourth of July holiday weekend?**




*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

During the Independence Day weekend, 16.5 percent of American travelers report having taken a trip. These travelers were more likely than others to be male, Millennials, residents of urban areas, have slightly higher incomes, stay in upscale hotels and have persons with a disability in their typical travel parties.

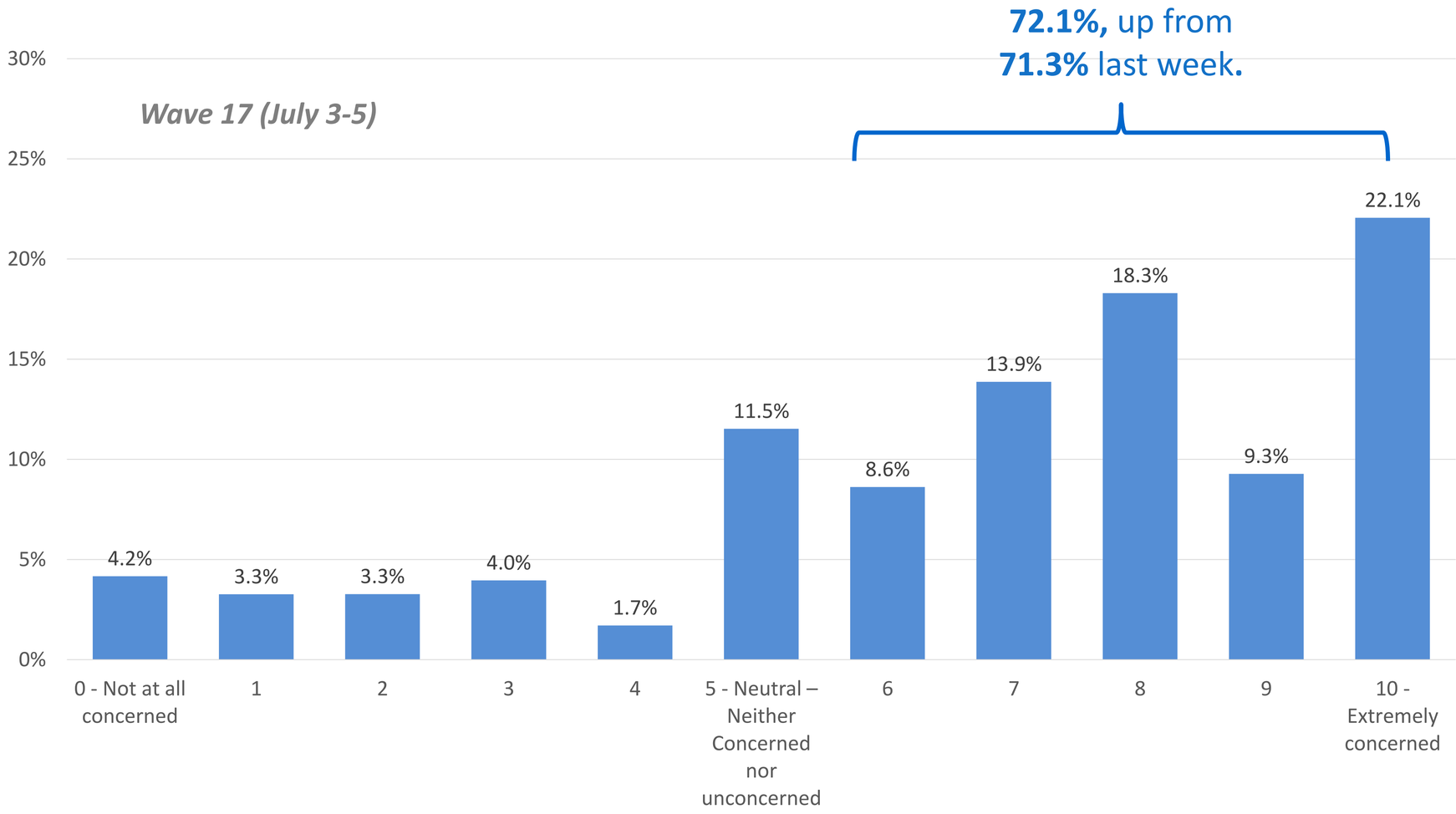


# Personal Health Concerns

**Traveler concerns about contracting the coronavirus remain elevated**. Now, 72.1 percent of survey respondents say they have some level of concern about contracting the virus, up slightly from 71.3 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 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

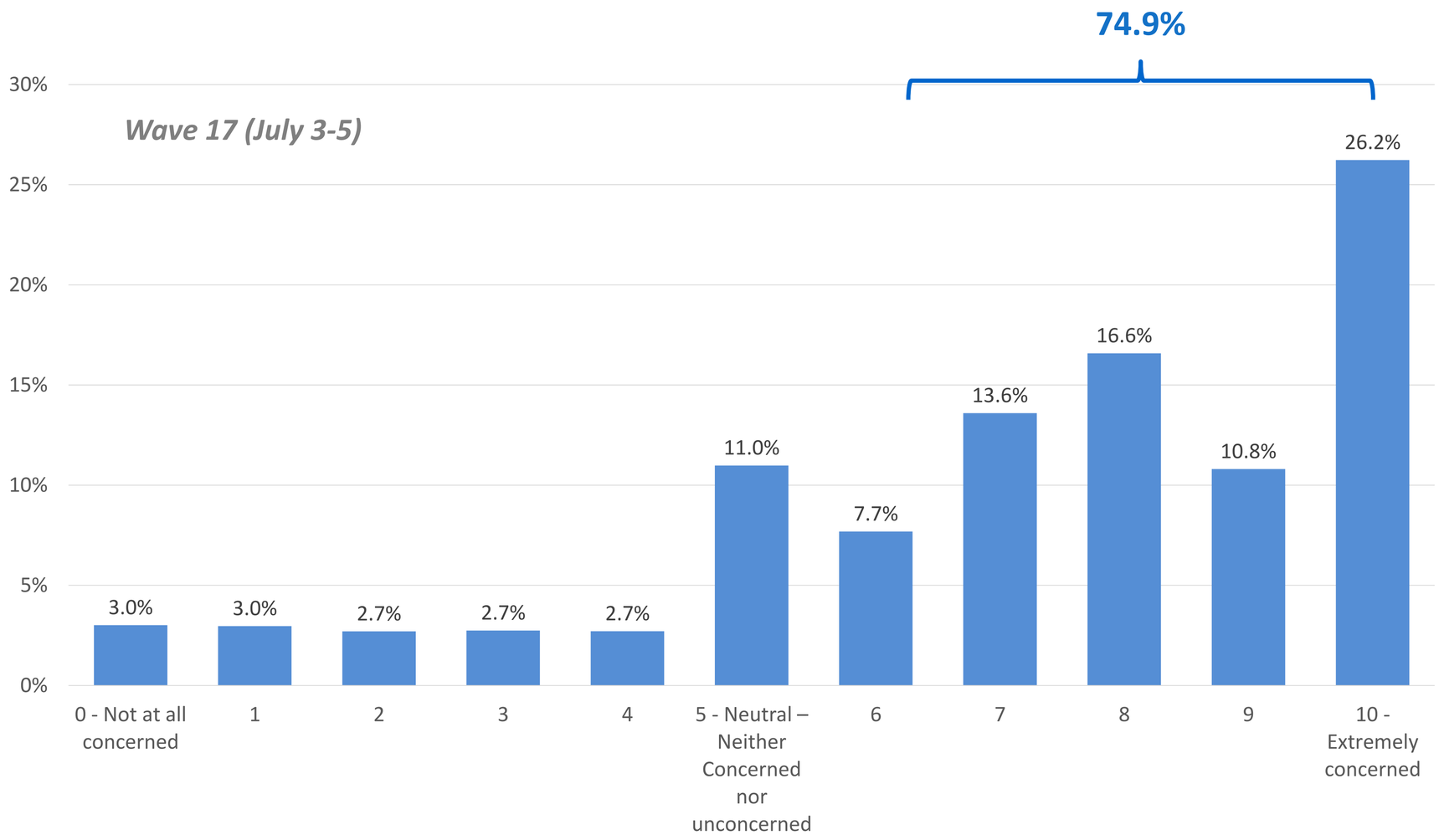


# Health Concerns (Family & Friends)

**Concerns about the health of friends and family also remain high**, with 74.9 percent expressing concern for the safety of their loved ones, down from 77.2 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 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

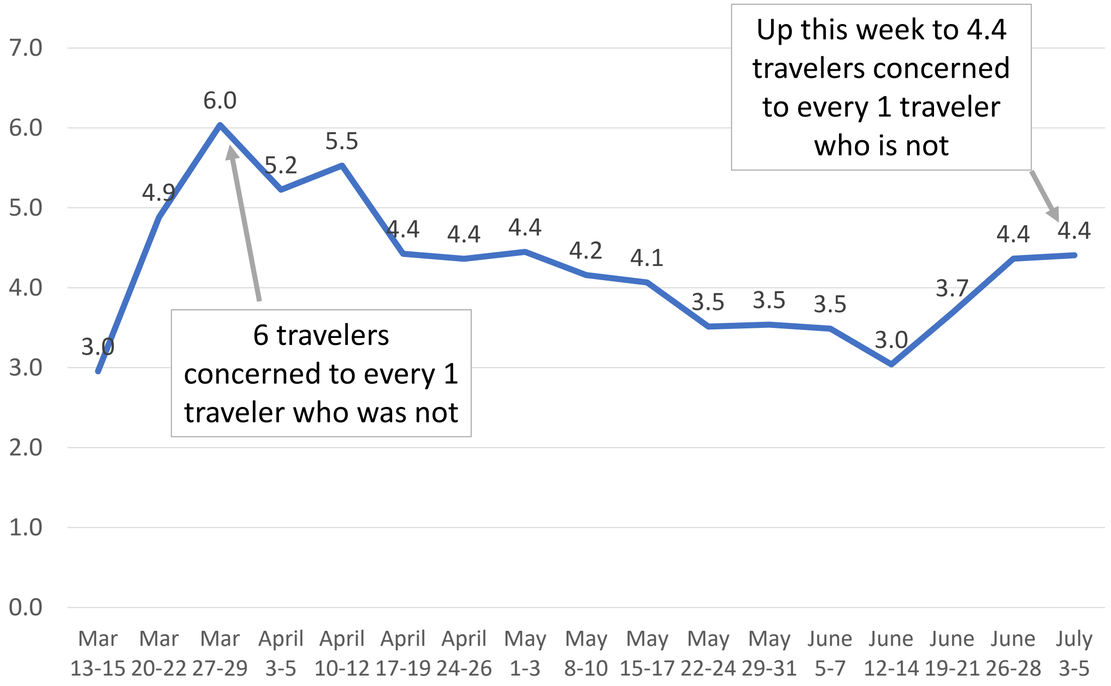


# Ratio of Concerned to Unconcerned Travelers: Safety

Looking at the ratio of travelers expressing concern for safety to those without concern shows improvement over the course of this study.

## Personal Safety

**Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale**

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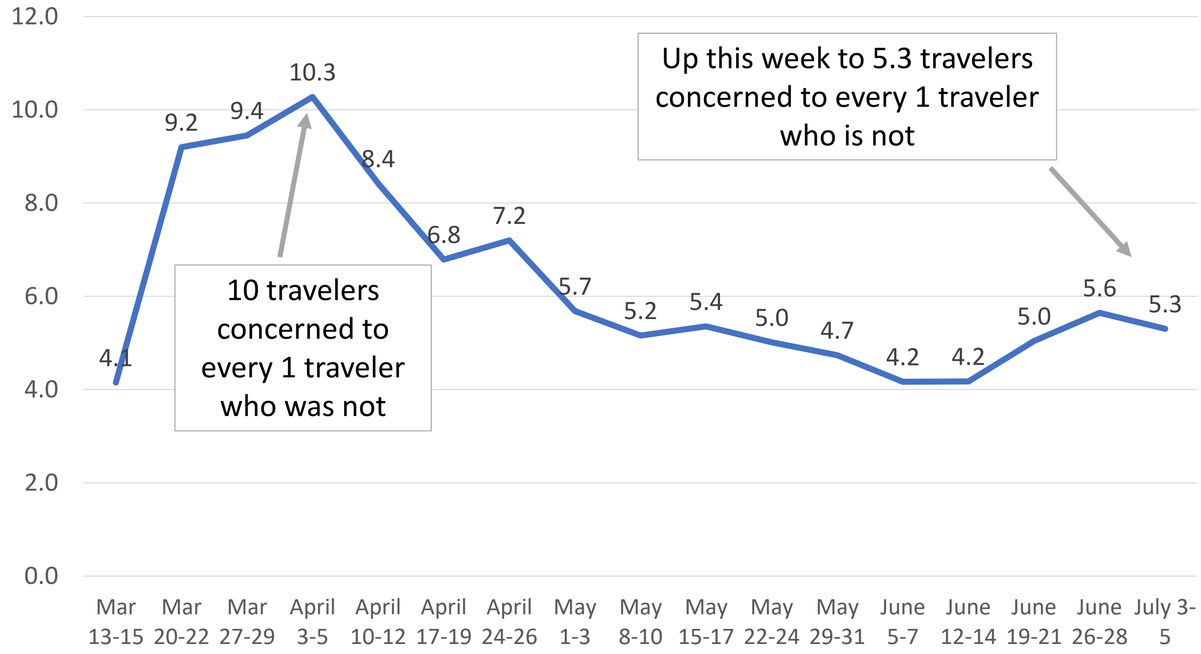
## Safety of Friends and Relatives

**Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale**




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

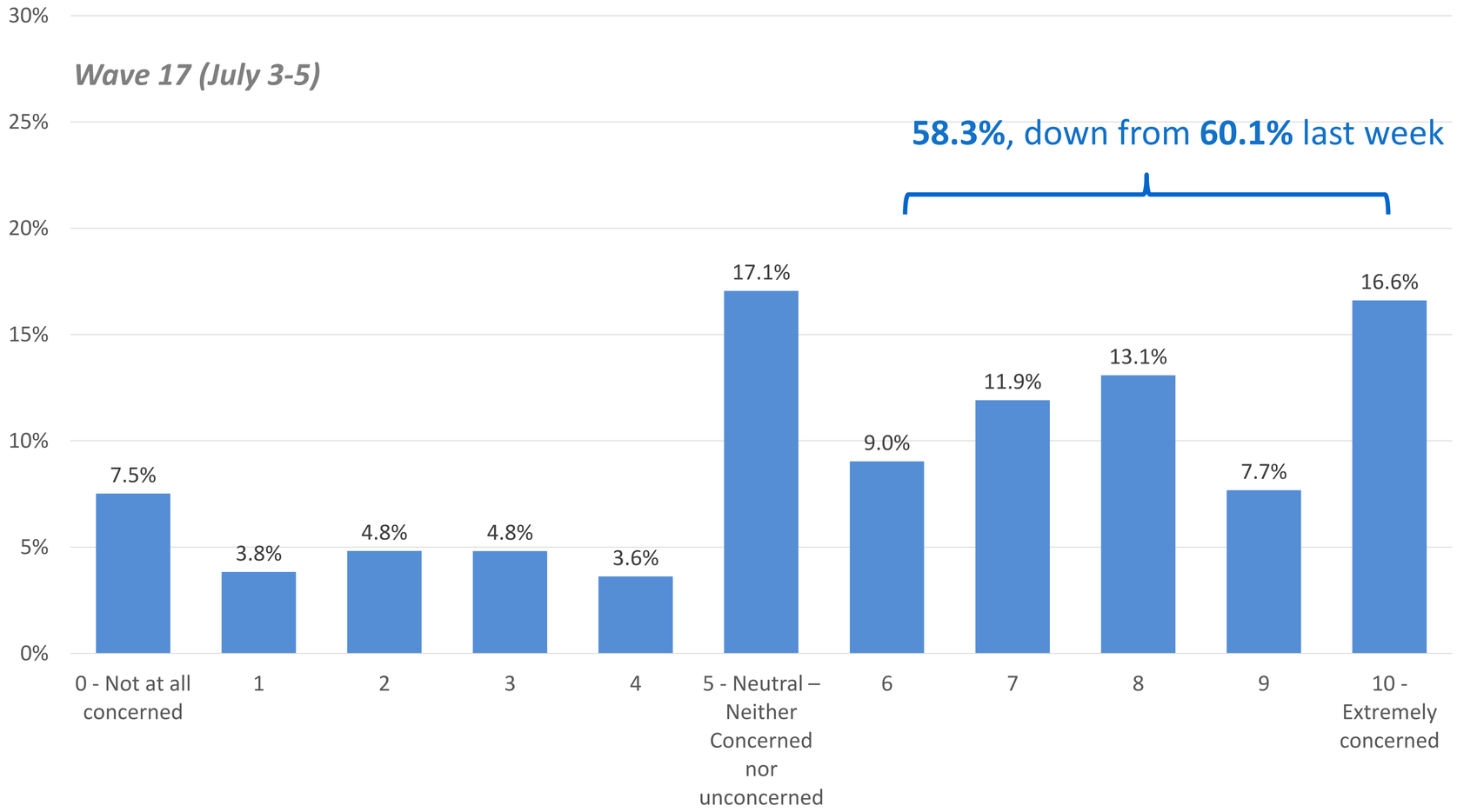
*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

# Concerns About Personal Finances

**Worries that coronavirus will impact Americans' personal finances slightly decreased from 60.1 percent last week to 58.3 percent this week.**

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

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

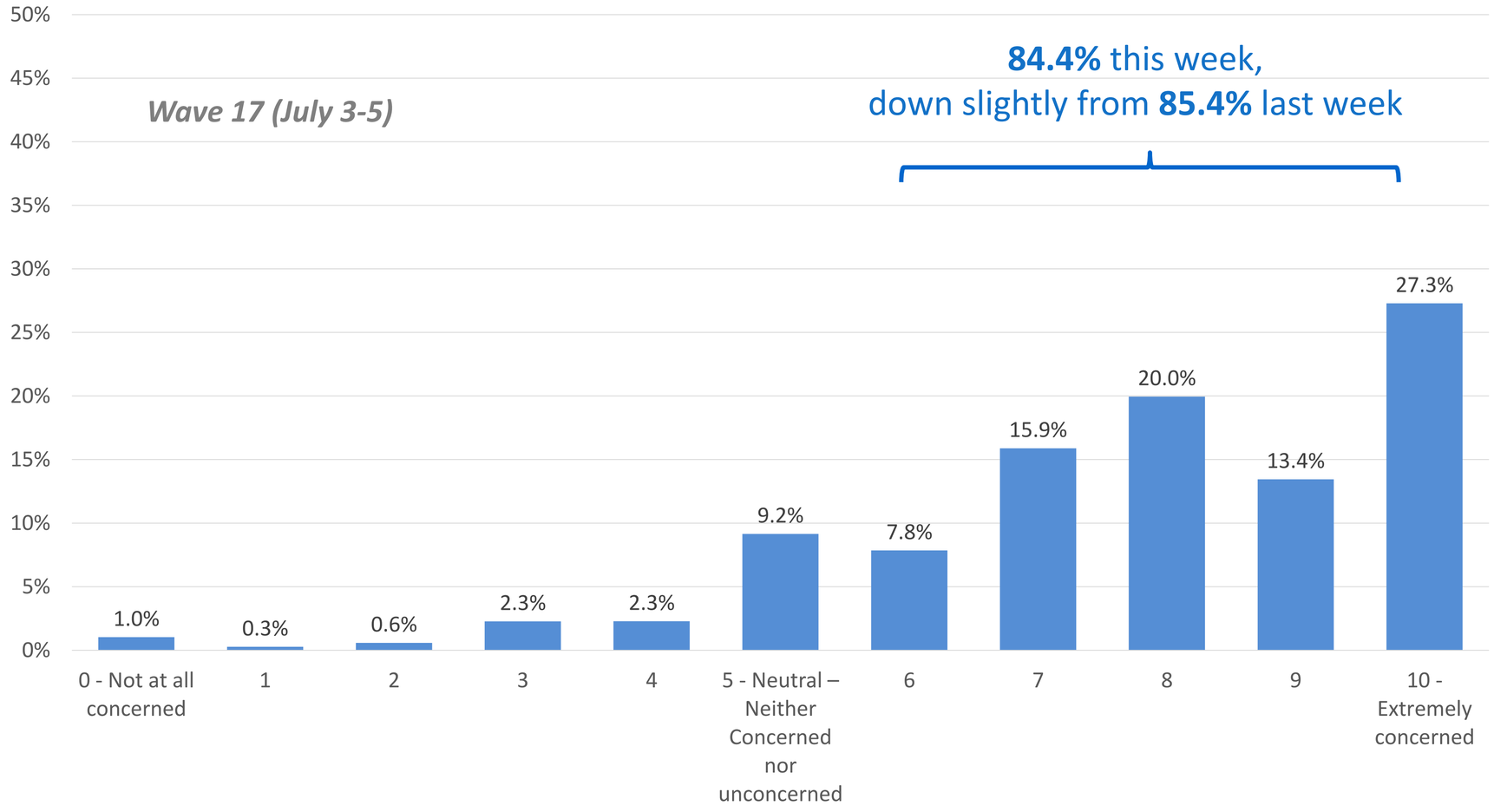


# Concerns About National Economy

**Concerns about the nation's overall economic performance remain high.** 84.4 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 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

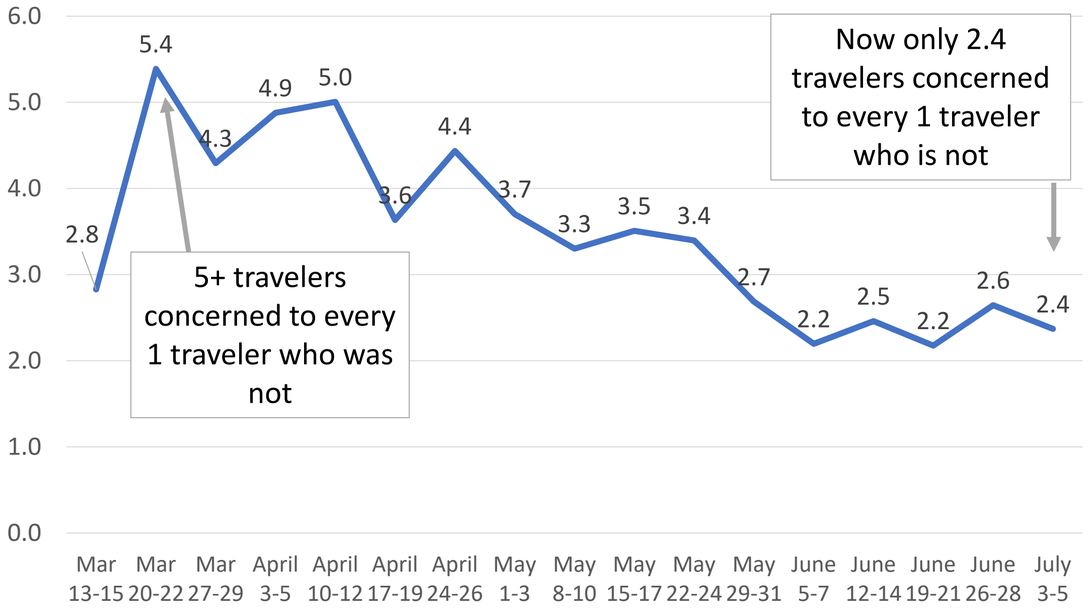


# Ratio of Concerned to Unconcerned Travelers: Economic Concerns

Looking at the ratio of travelers expressing economic concerns to those without concern shows improvement over the course of this study.

## Personal Finances

**Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale**

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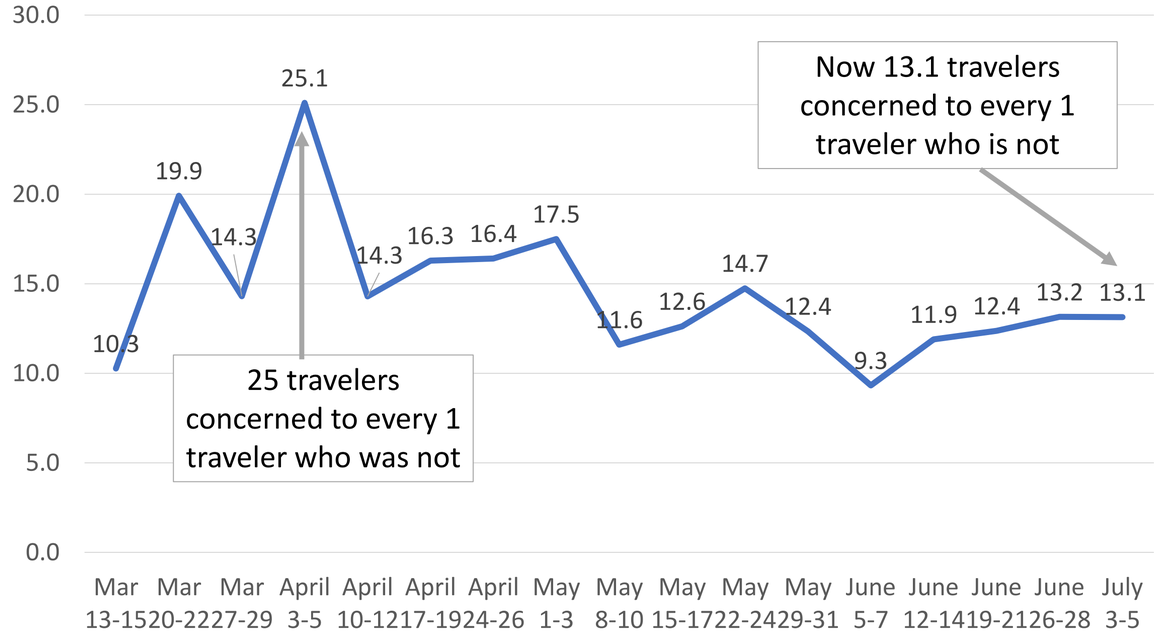
## National Economy

**Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale**




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

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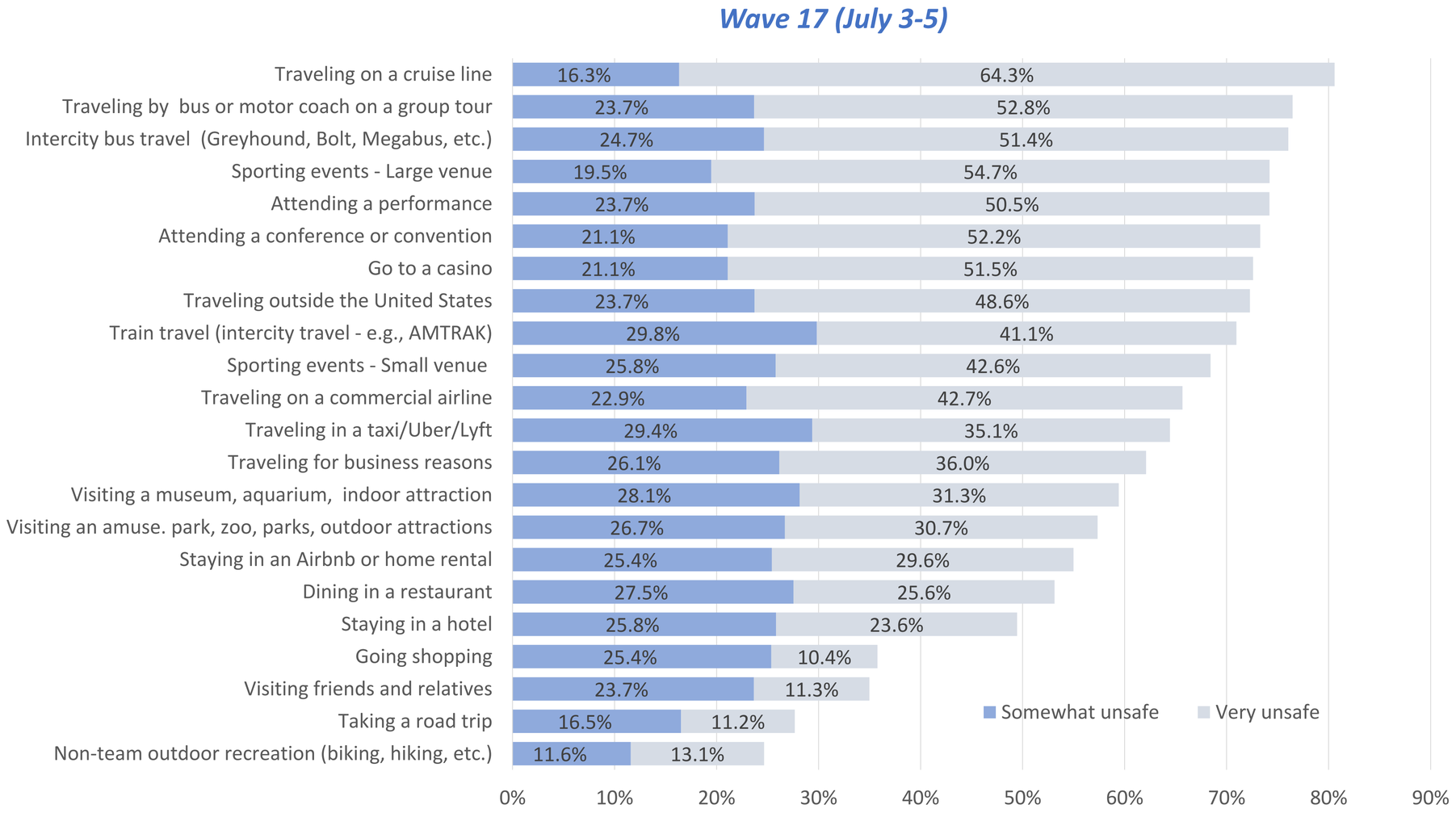
# Perceived Safety of Travel Activities (Wave 17)

Traveling on a cruise continues to be seen as the least safe travel activity.

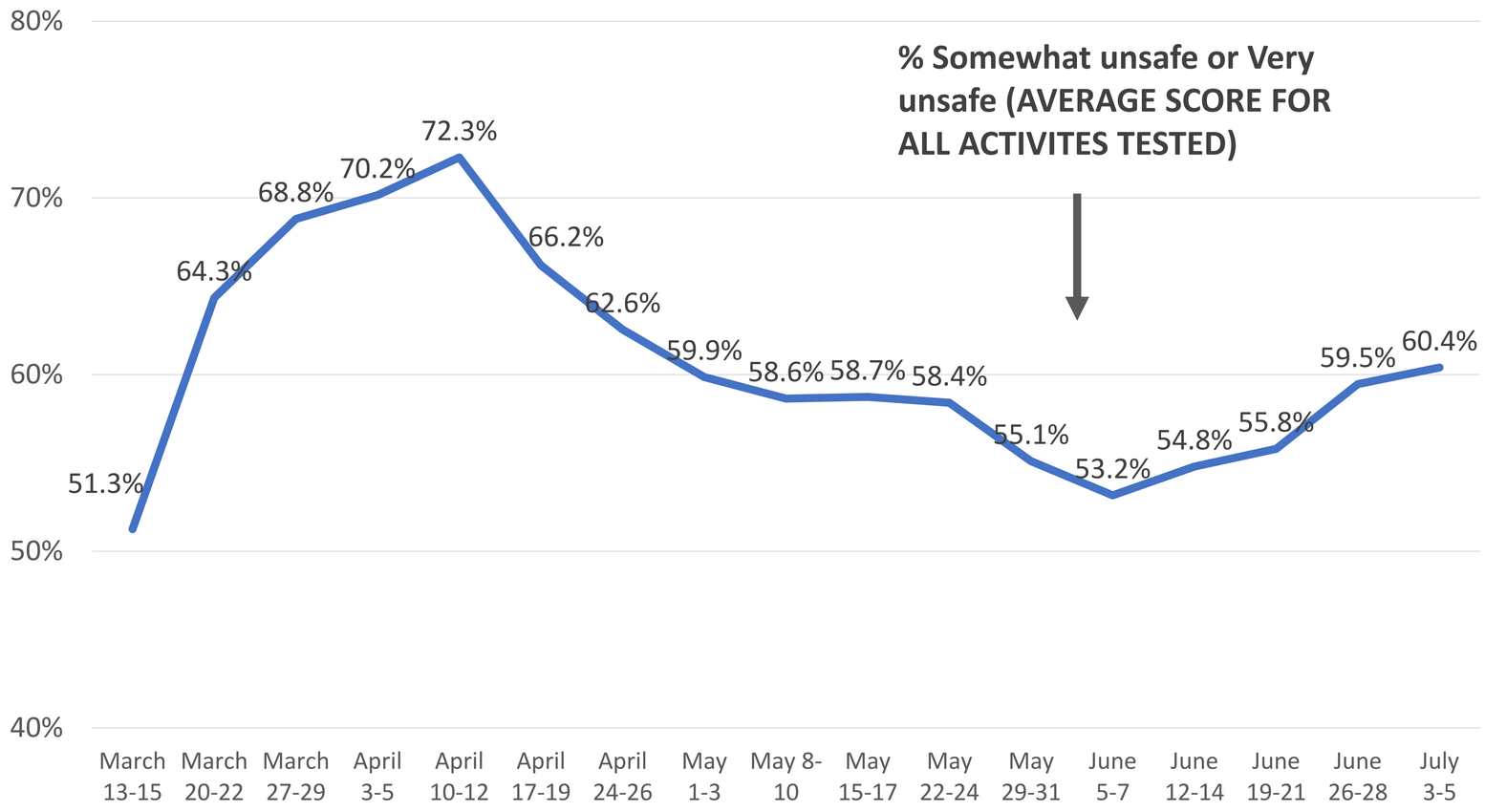
**Question: At this moment, how safe would you feel doing each type of travel activity?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*



# Perceived Safety of Travel Activities (Waves 1-17 Comparison)

**Traveler ratings of the safety of various travel activities reverted this week.** In this most recent survey wave, the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe” reversed its trend and increased slightly.

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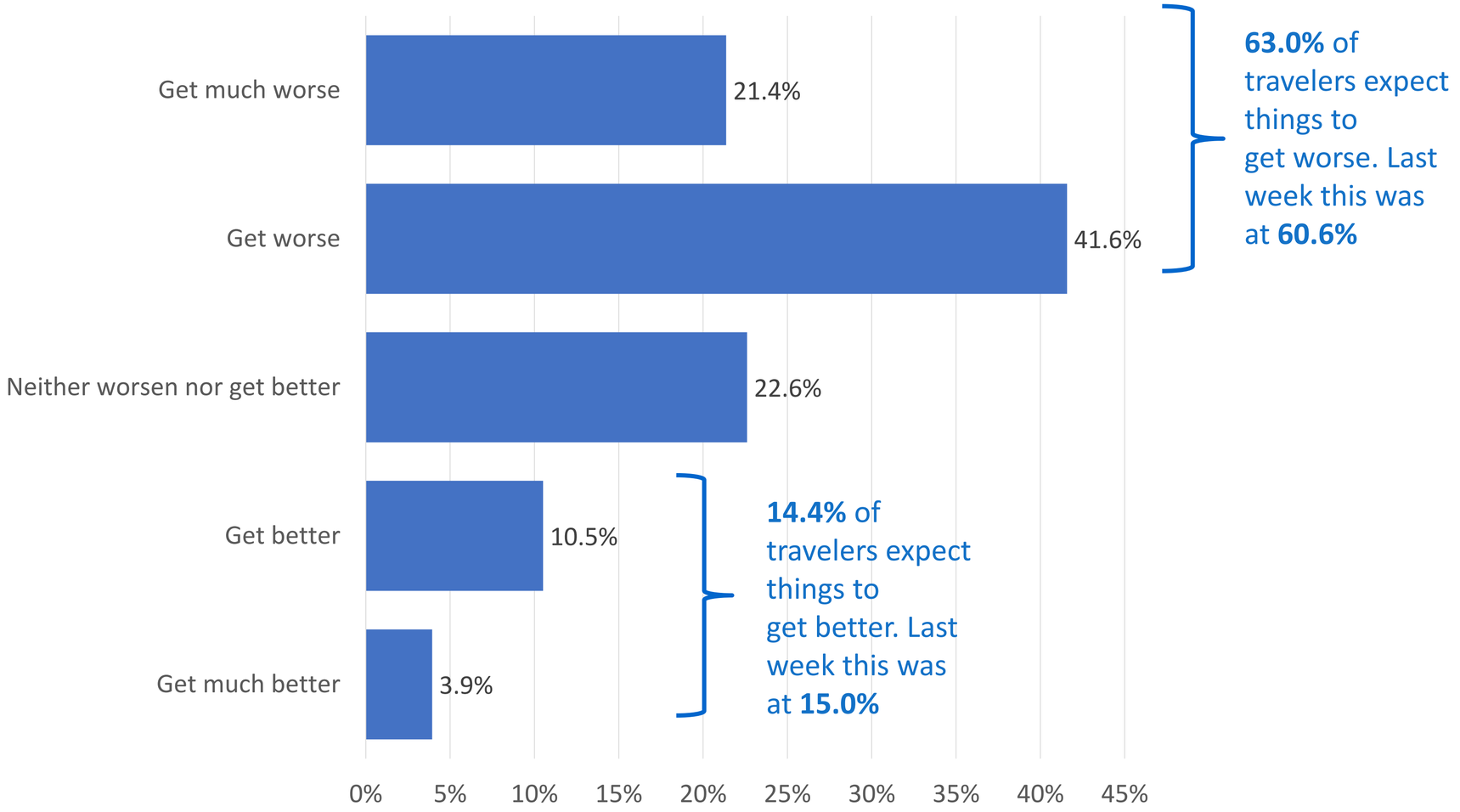
# Expectations for the Coronavirus Outbreak

**Concerns that the severity of the pandemic will get worse in the next month shifted negatively this week**. 63.0 percent of American travelers expect the coronavirus situation to get worse in the next month, up from 60.6 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 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

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# Expectations for the Coronavirus Outbreak

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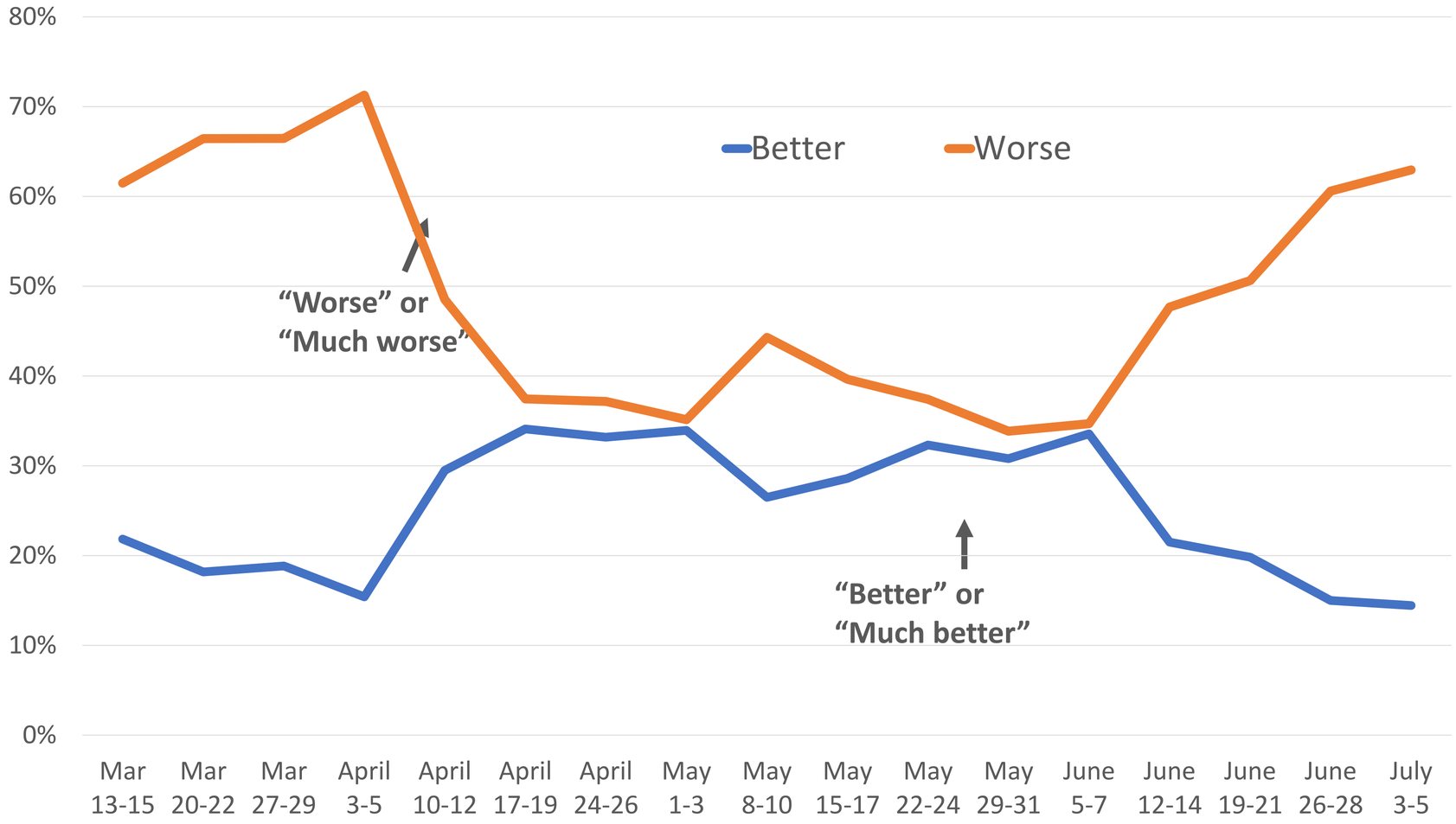


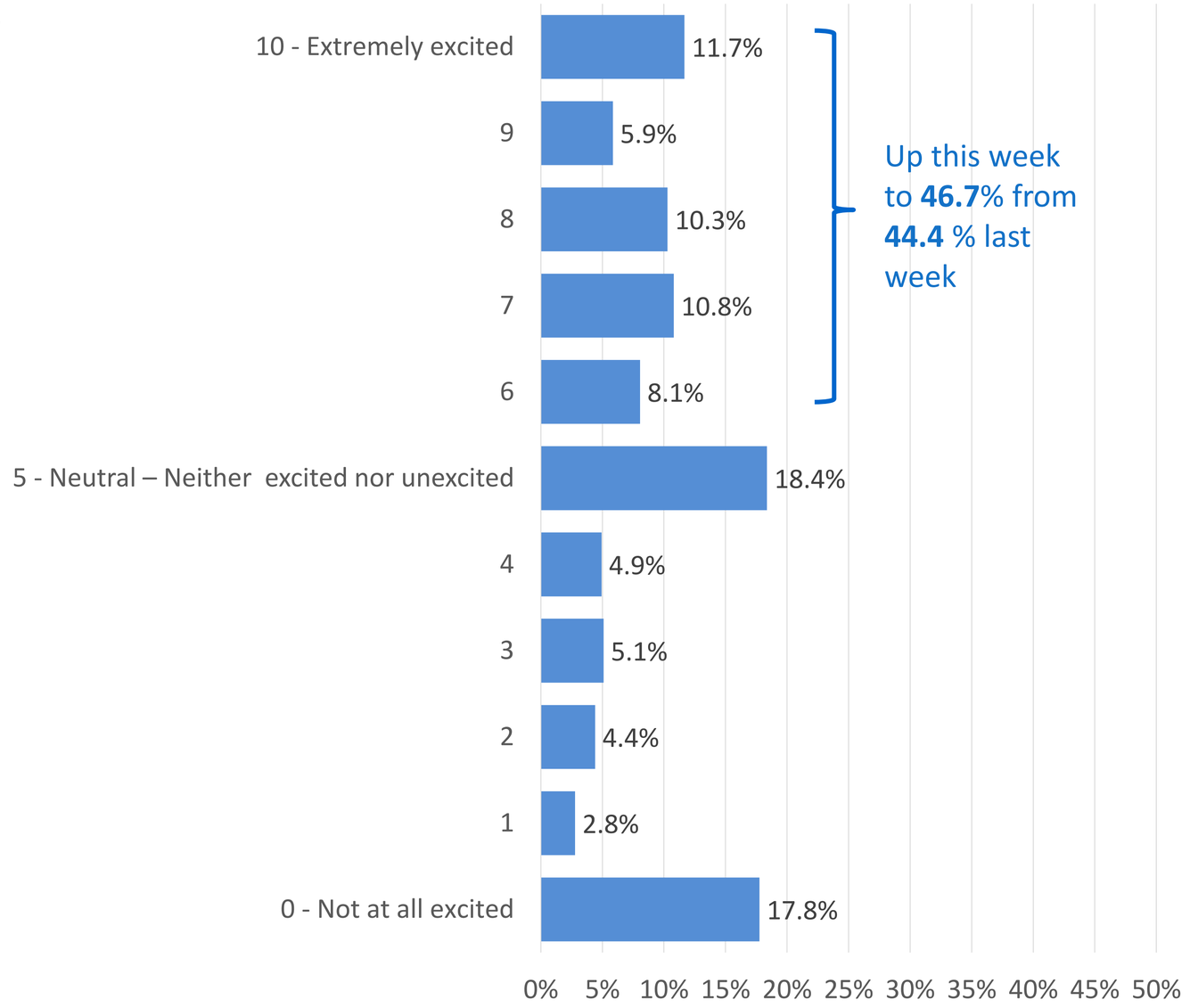
# Excitement to Travel Now

**Interest in short trips increased this week.** Just under half of travelers surveyed (46.7%) 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 slightly from 44.4 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: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

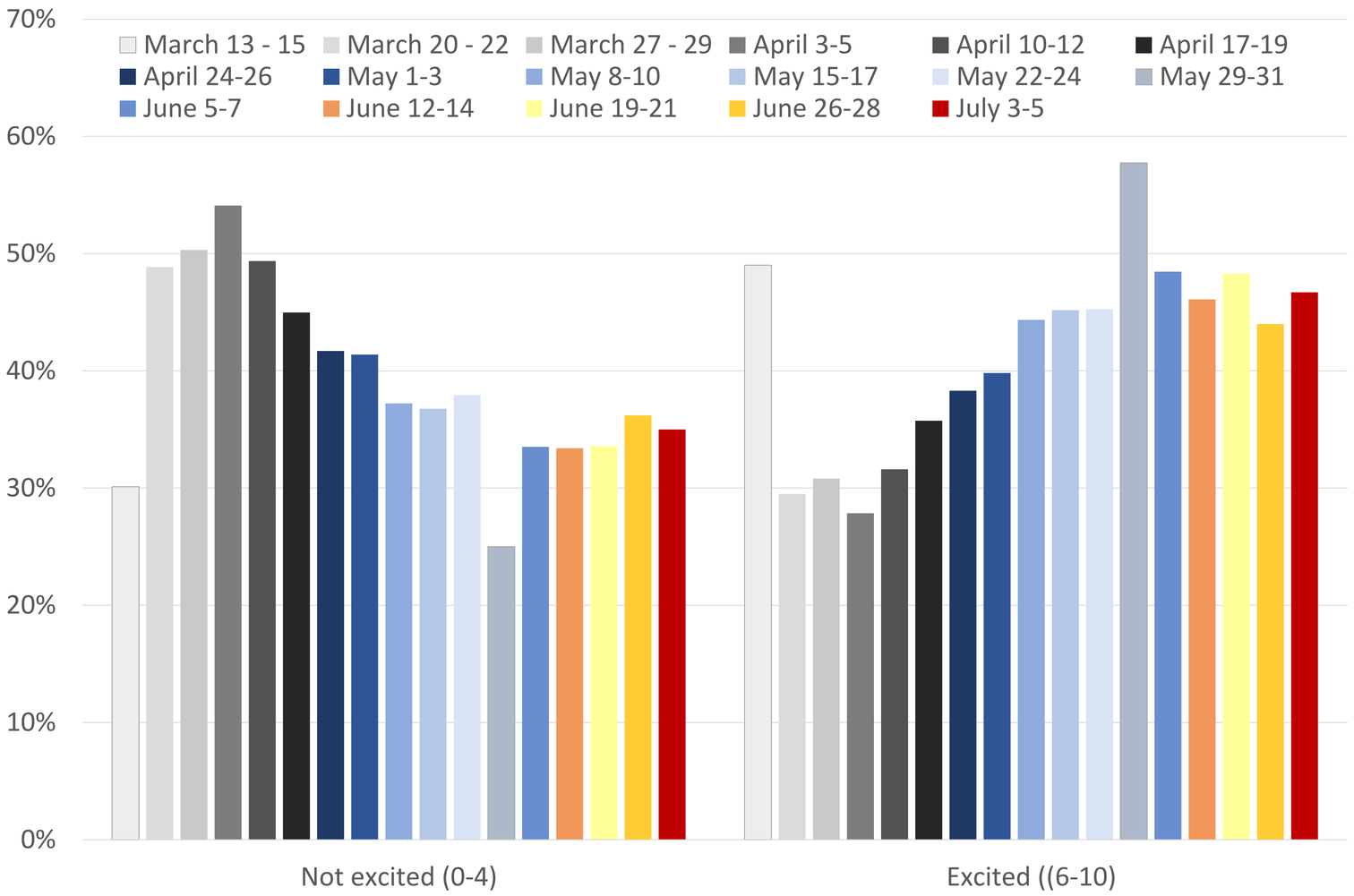


# Excitement to Travel Now (Excited vs. Not Excited)

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

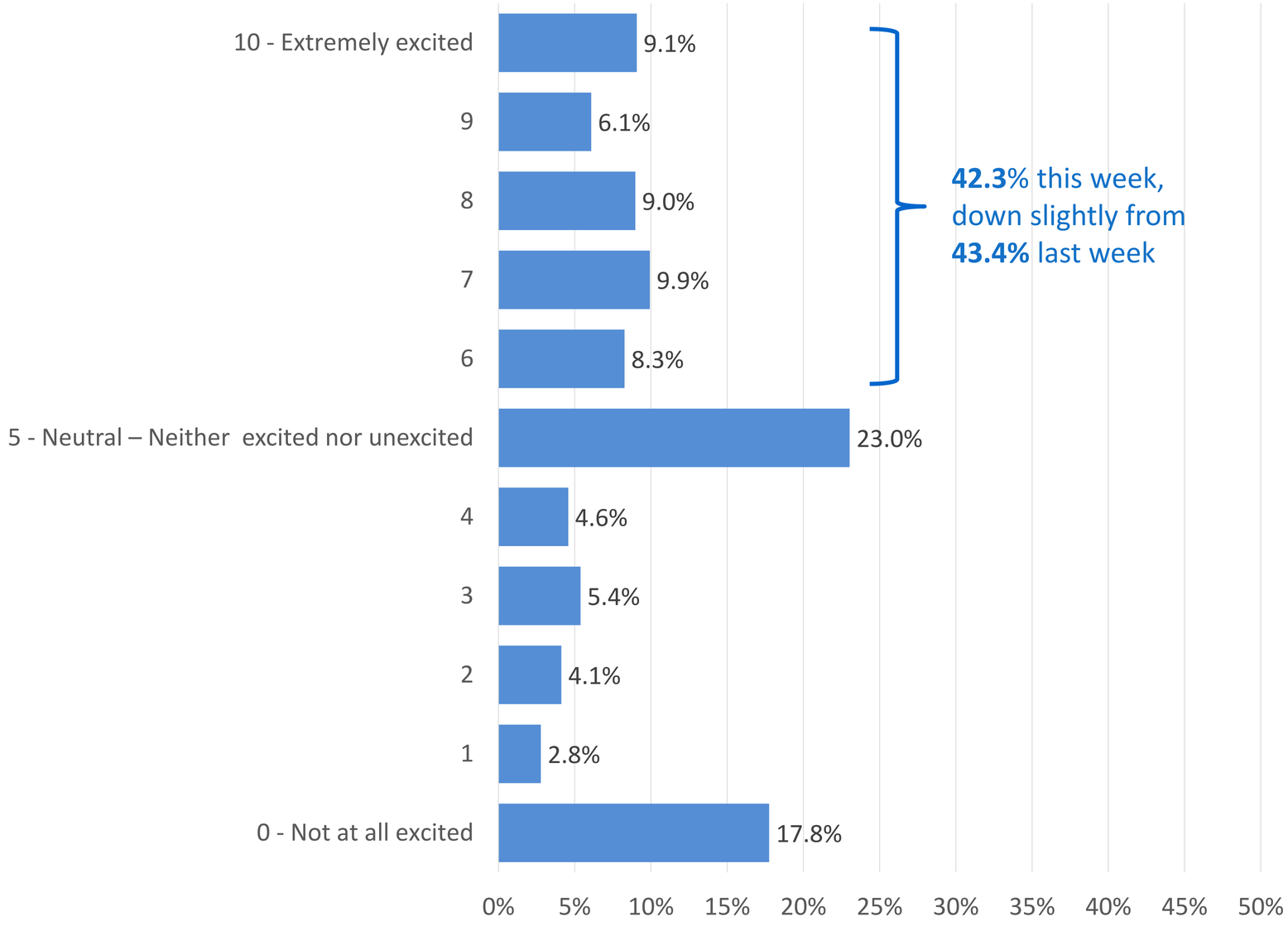


# Openness to Travel Information

**Travelers' interest in learning about new experiences and destinations decreased slightly this week.** In total, 42.3 percent of American travelers surveyed 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?**

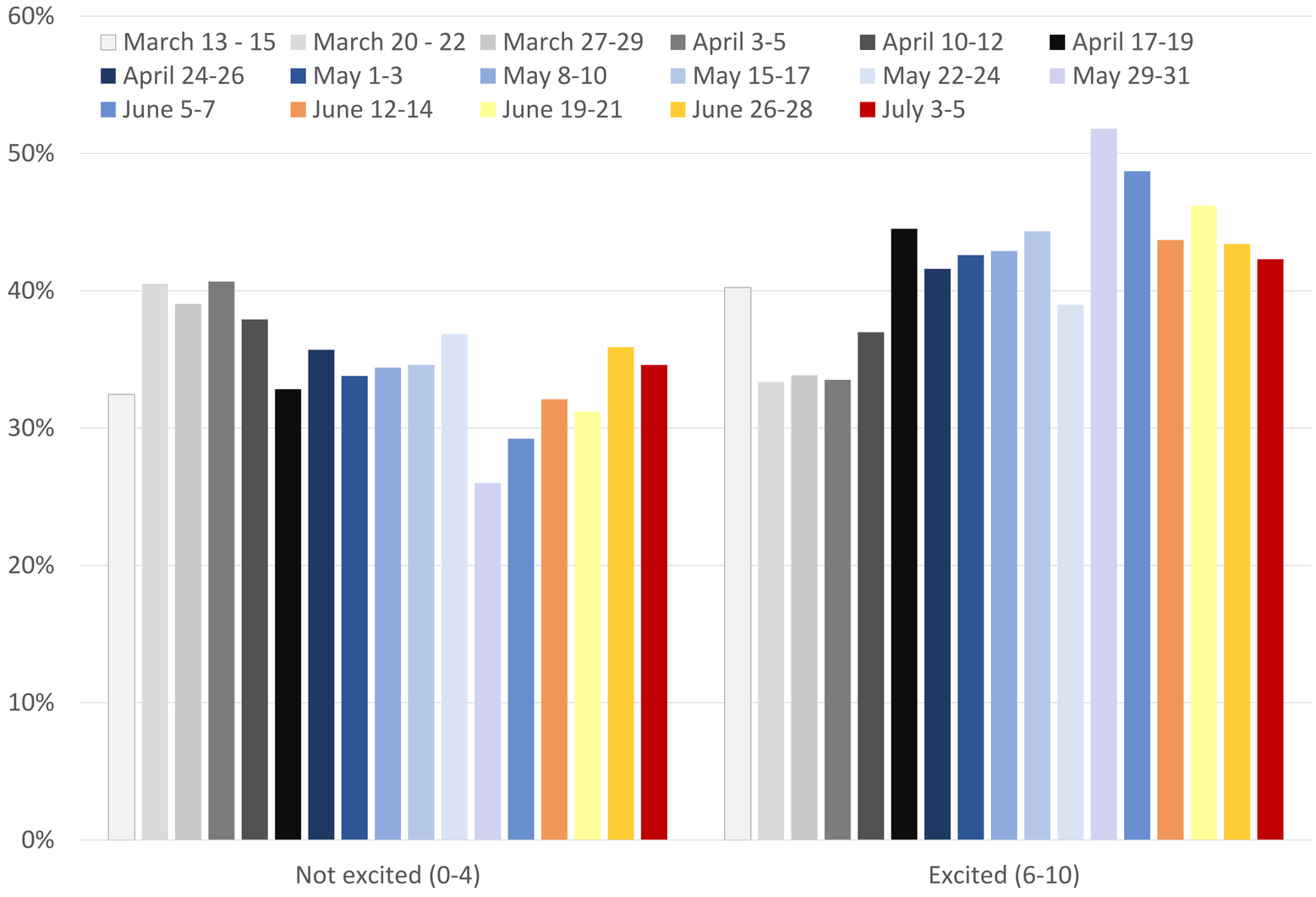
*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*



# 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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*



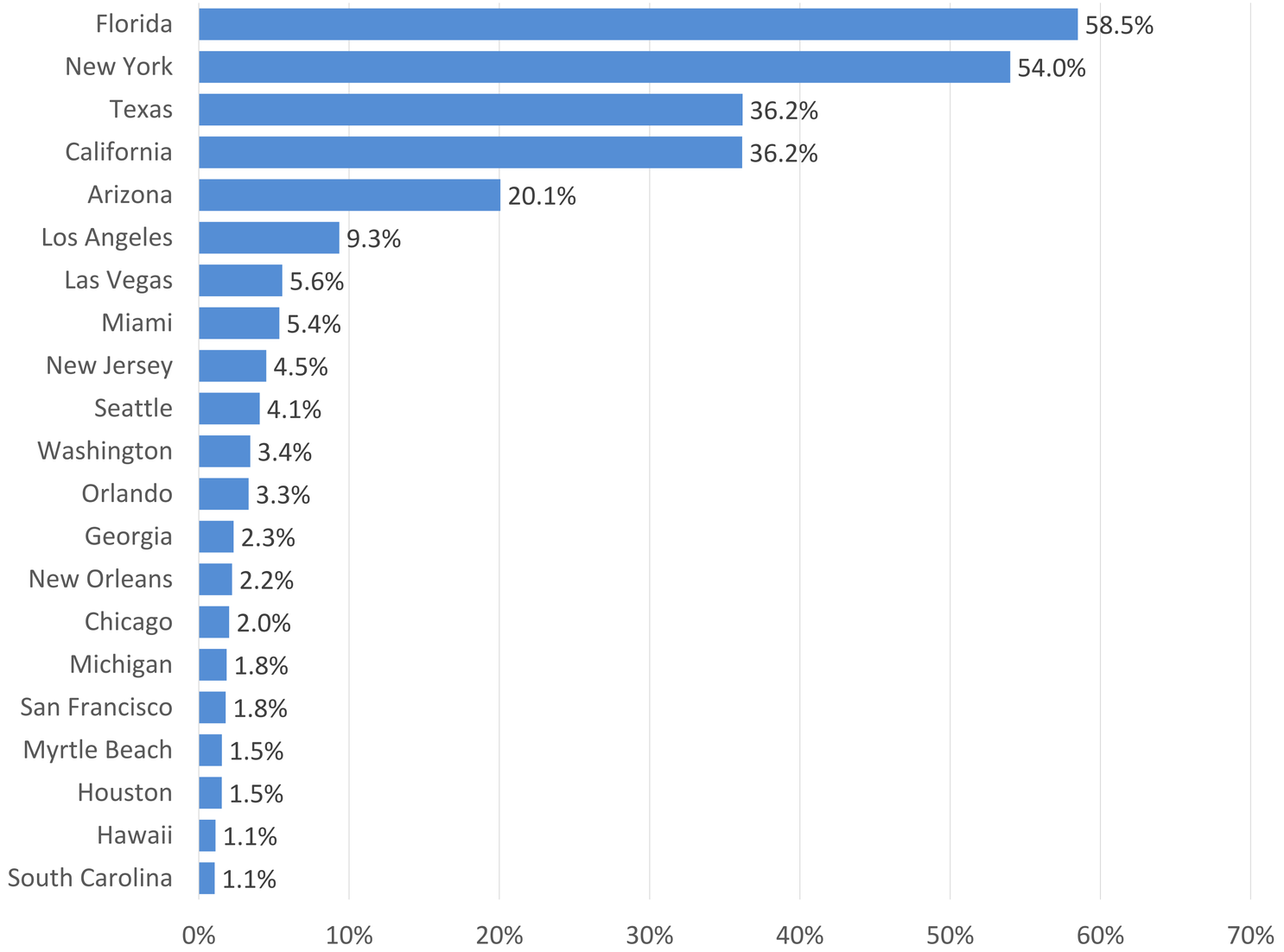
# Most Talked About Coronavirus Hotspots

**Florida is now the most talked about destination with coronavirus issues.**

Approximately 60 percent of survey respondents identified Florida as one of the three most talked about places, surpassing New York as the most talked about destination for the first time.

**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 17: All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

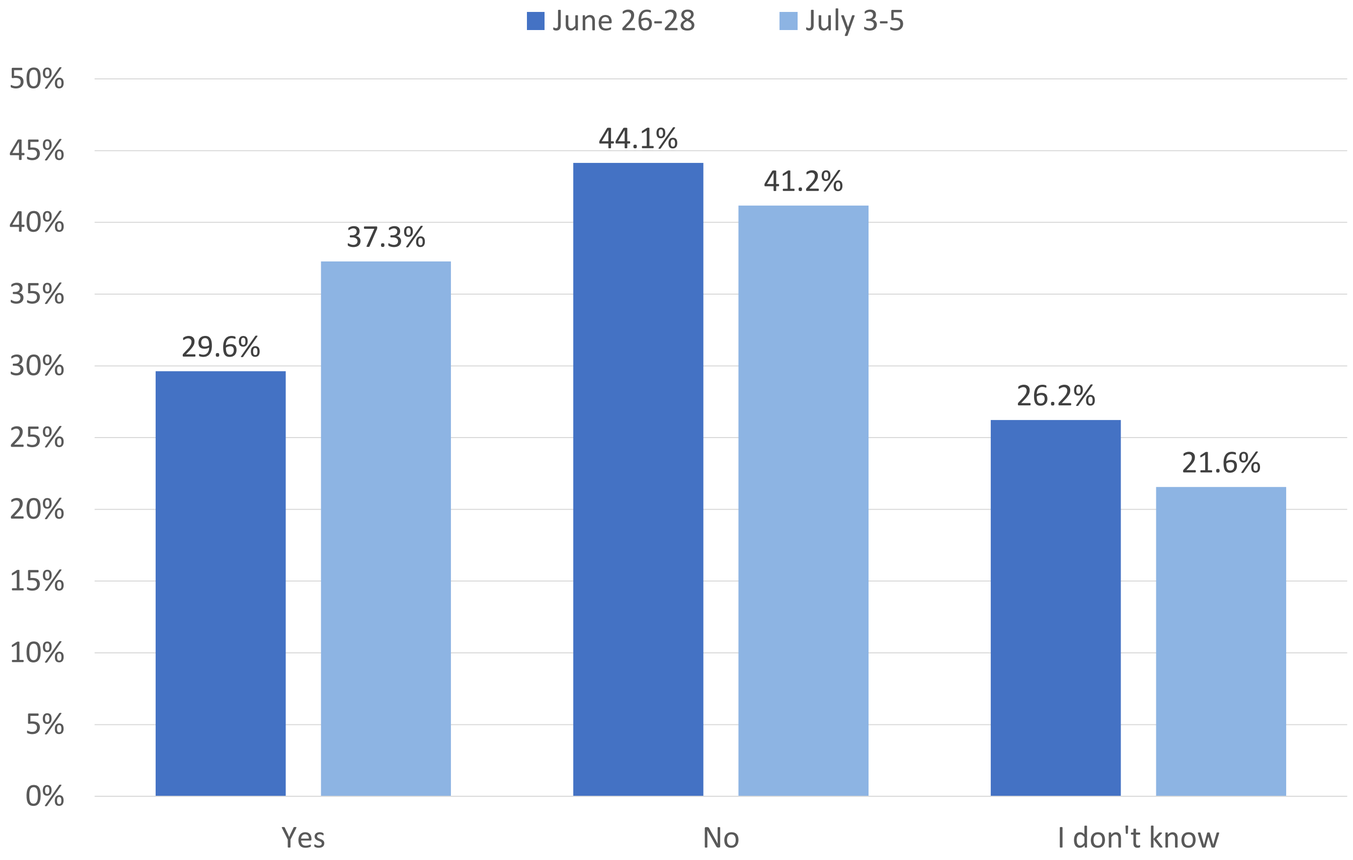


# Specific Destinations that Will be Avoided

**Question: Thinking about LATER THIS YEAR (2020), are there any domestic destinations YOU MIGHT NORMALLY CONSIDER VISITING that you would now ABSOLUTELY NOT VISIT due to the Coronavirus situation?**

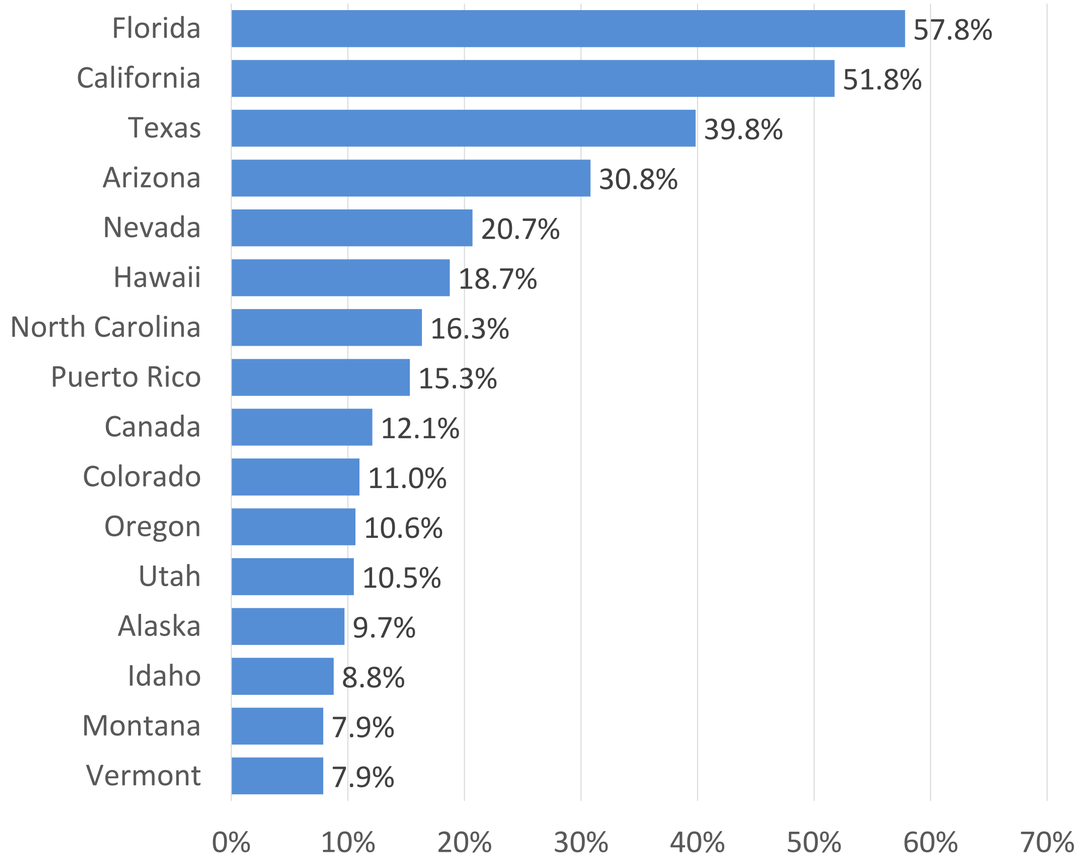
*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

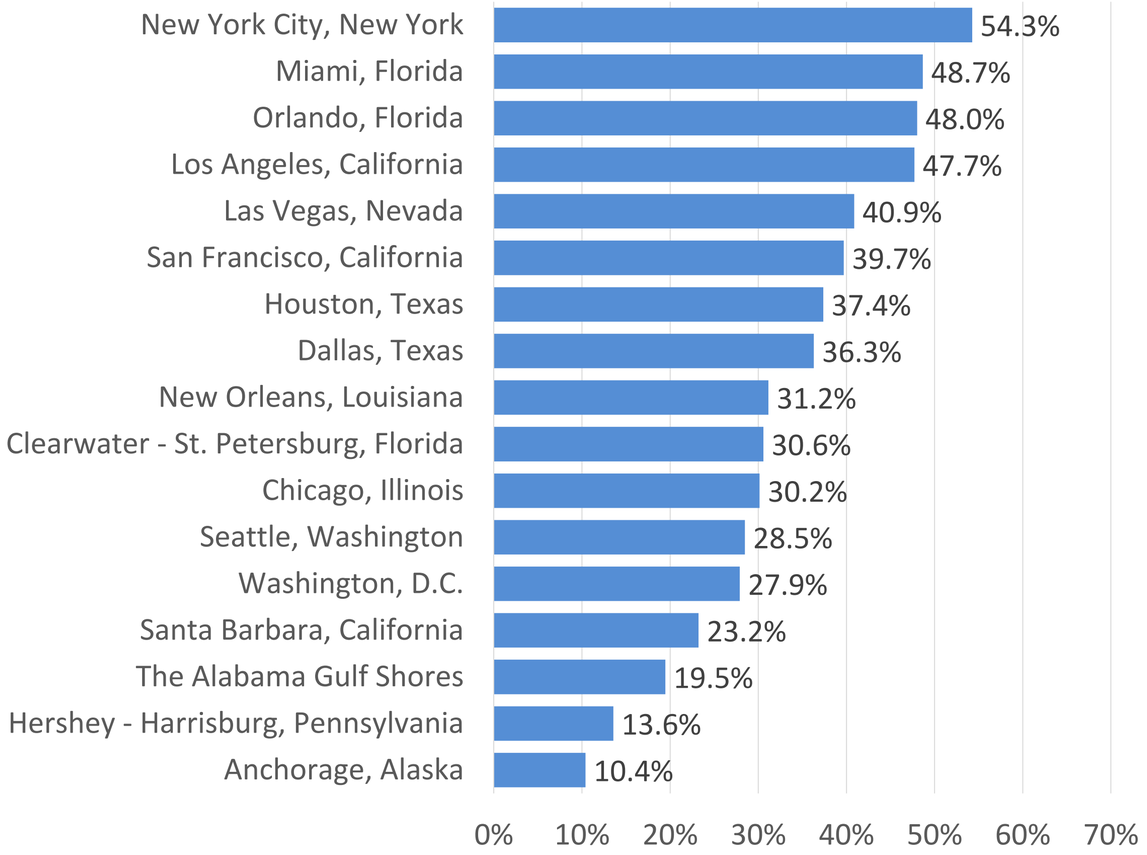
Nearly 40 percent of American travelers say they will avoid destinations they would normally consider visiting for the remainder of the year.



# Travelers Who Will Not Visit Specific Destinations: Destinations that Will be Avoided

**Question: What are these domestic destinations that you would absolutely not visit later this year? (closed-ended)**



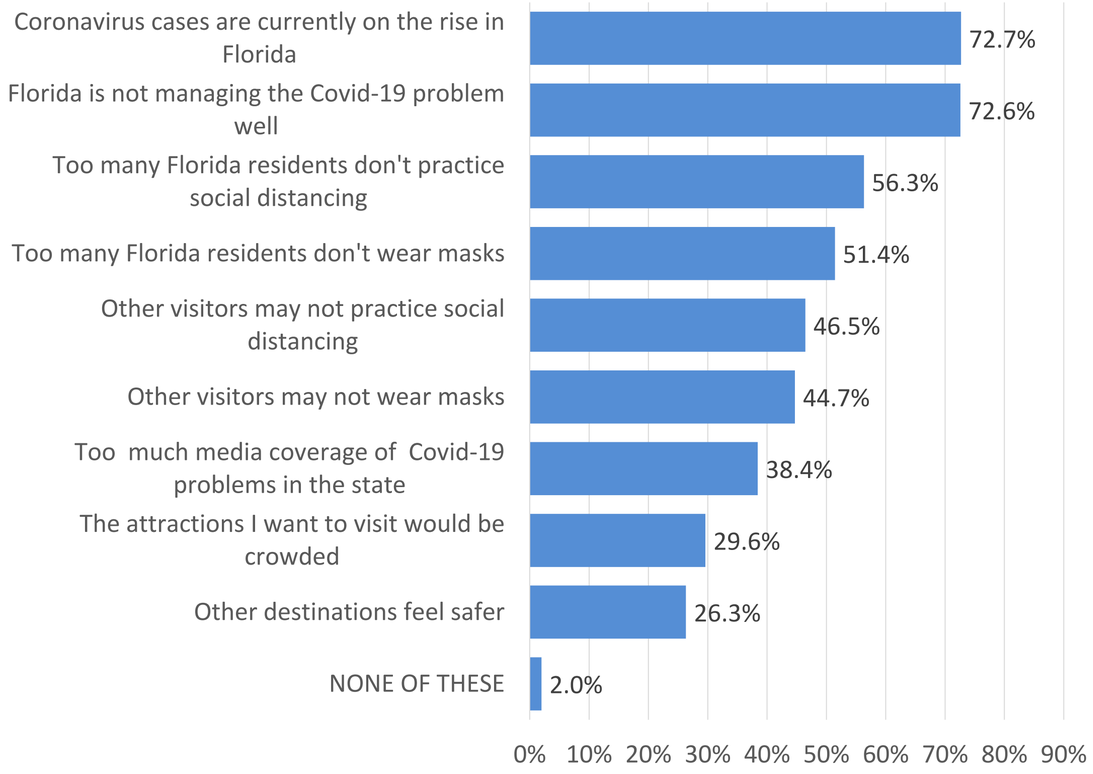




*(Base: Respondents who would not visit specific destinations due to pandemic, 494 completed surveys. Data collected July 3-5, 2020)*

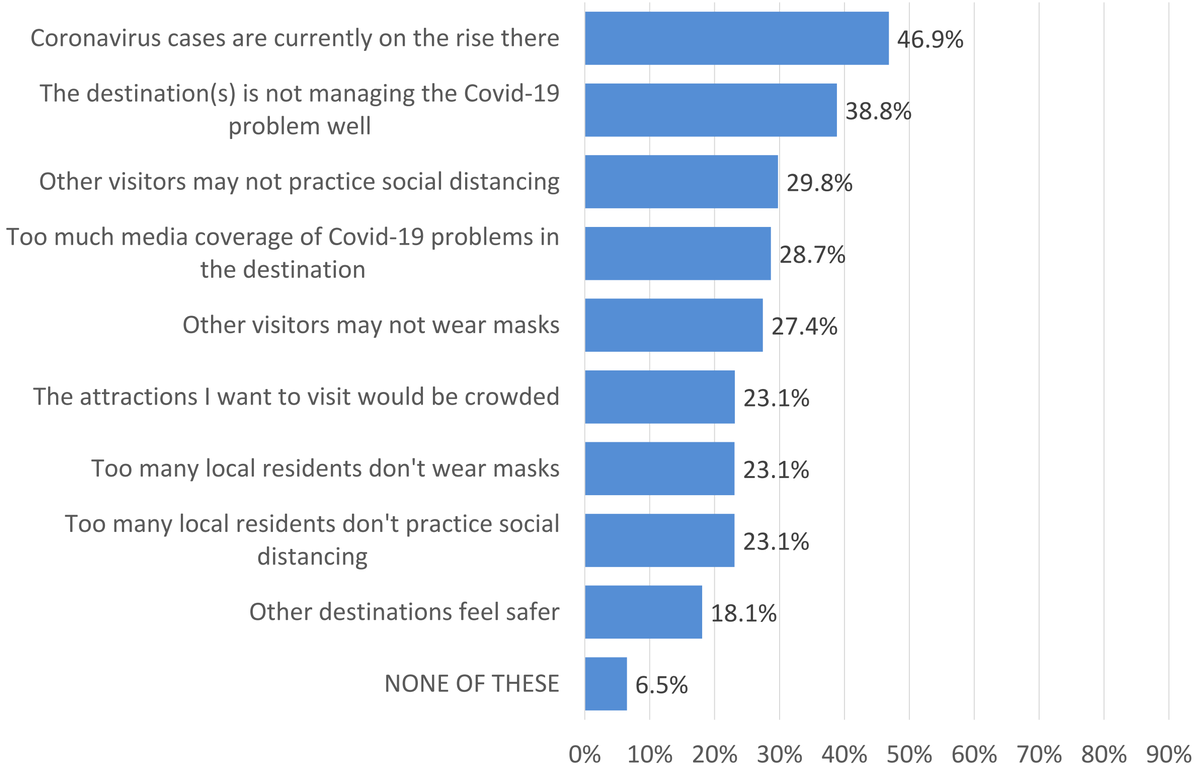
# Travelers Who Will Not Visit Specific Destinations: Reasons for Avoiding Destinations

**Question:** **You said you would now absolutely not visit at least one specific destination(s) later this year. Please tell us why by selecting each item that contributes to you not wanting to visit the destination(s).**

## *Travelers Unwilling to Visit Florida*




## *Travelers Unwilling to Visit Other Destinations*



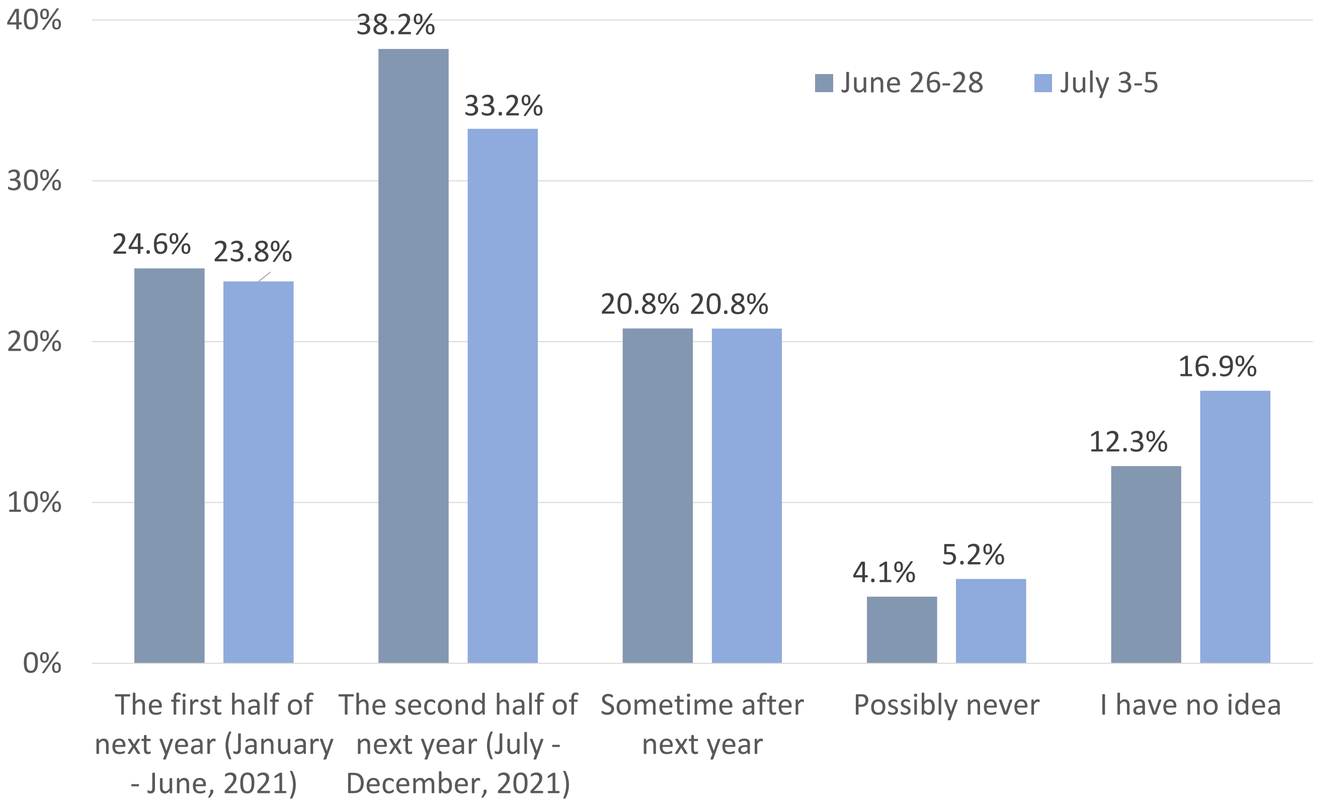

*(Base: Respondents who would not visit Florida/other specific destinations due to pandemic, 495/306 completed surveys. Data collected July 3-5, 2020)*

# Travelers Who Will Not Visit Specific Destinations: When Will They Return?

**Question: When do you expect you will feel comfortable visiting the destinations you listed? (Select the one that best describes you)**

*(Base: Respondents who would not visit specific destinations due to pandemic, 494 completed surveys. Data collected July 3-5, 2020)*

Over half of travelers who will not visit specific destinations due to coronavirus say it will be in the second half of next year or later before they will consider such destinations again.

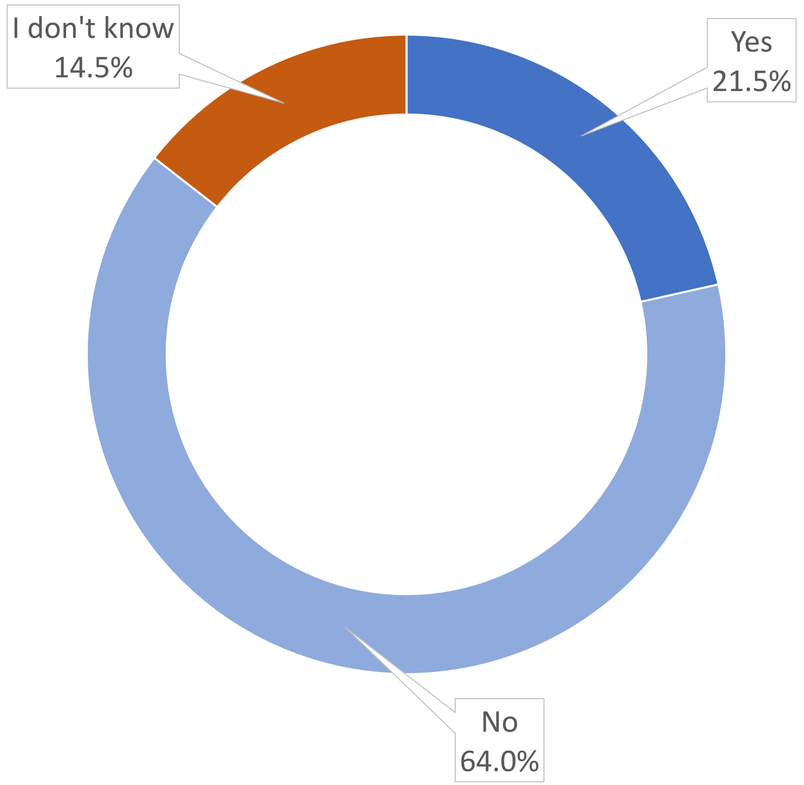


# Currently Considering Specific Destinations in 2020

**Question: Are you currently considering visiting any specific leisure destinations during the remainder of 2020?**

*(Base: Wave 17 data. All respondents, 1,360 completed surveys. Data collected July 3-5, 2020)*

One-in-five American travelers say they have a specific destination in mind to visit for leisure in 2020.

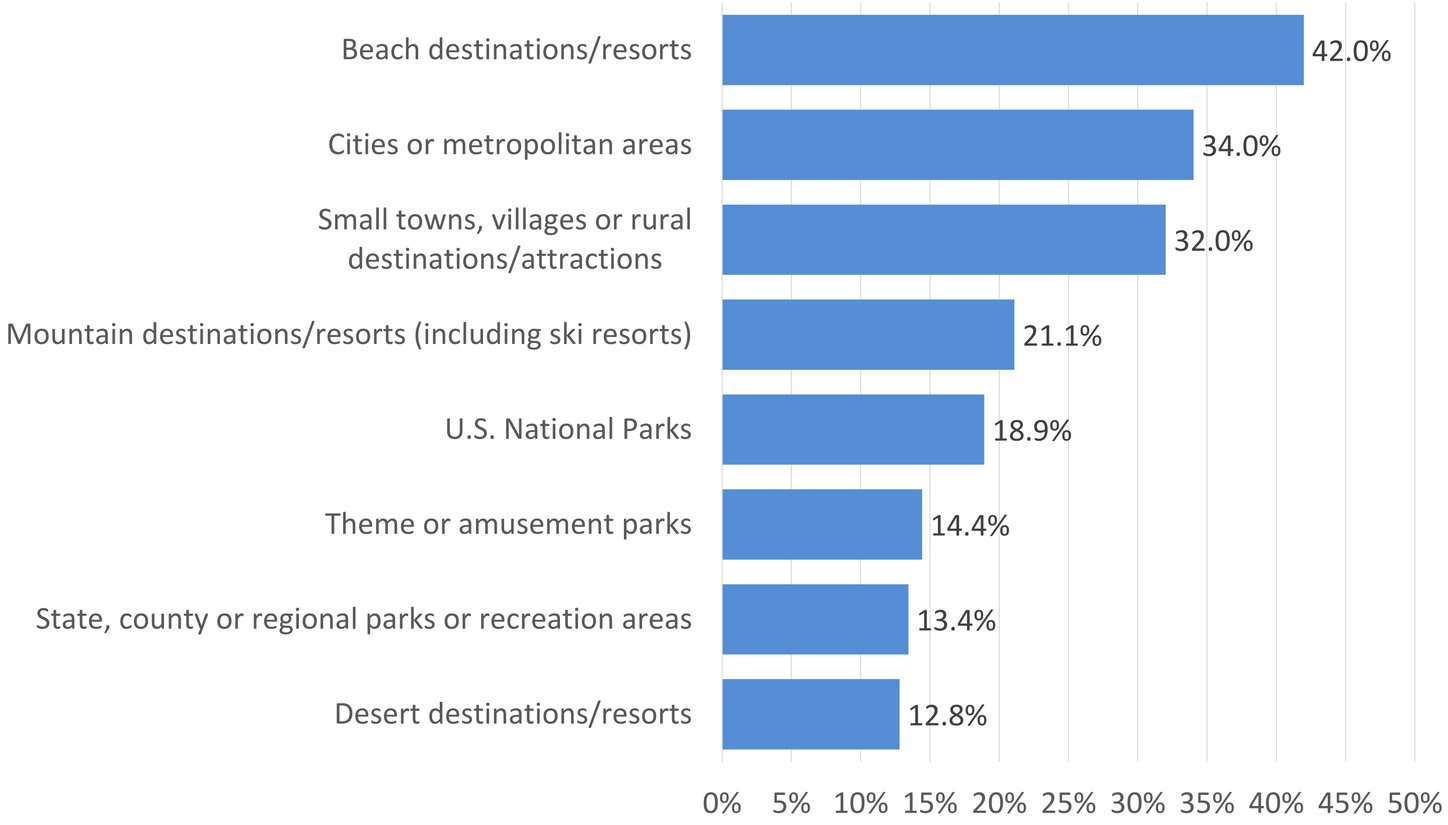


# Specific Destination Types Considered in 2020

**Question: Thinking about where you are currently considering visiting, which types of destinations are you considering? (Select all that apply)**

*(Base: Wave 17 data. Respondents currently considering specific leisure destinations for 2020, 294 completed surveys. Data collected July 3-5, 2020)*

Americans who already have a destination(s) in mind for their 2020 leisure travel plans continue to show an affinity for beaches (42.0%). Over a third of these travelers say they will visit a city this year and similarly, 32.0 percent say they will visit a small town or rural area.

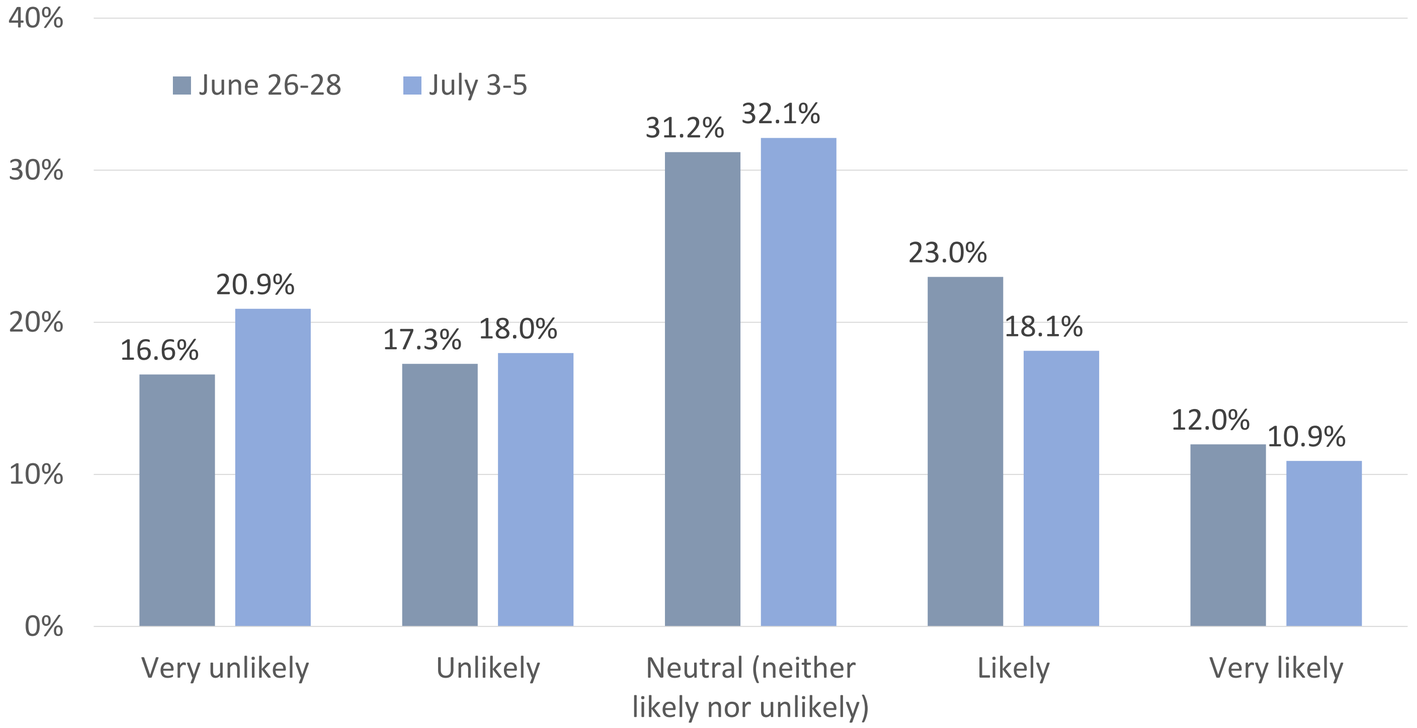


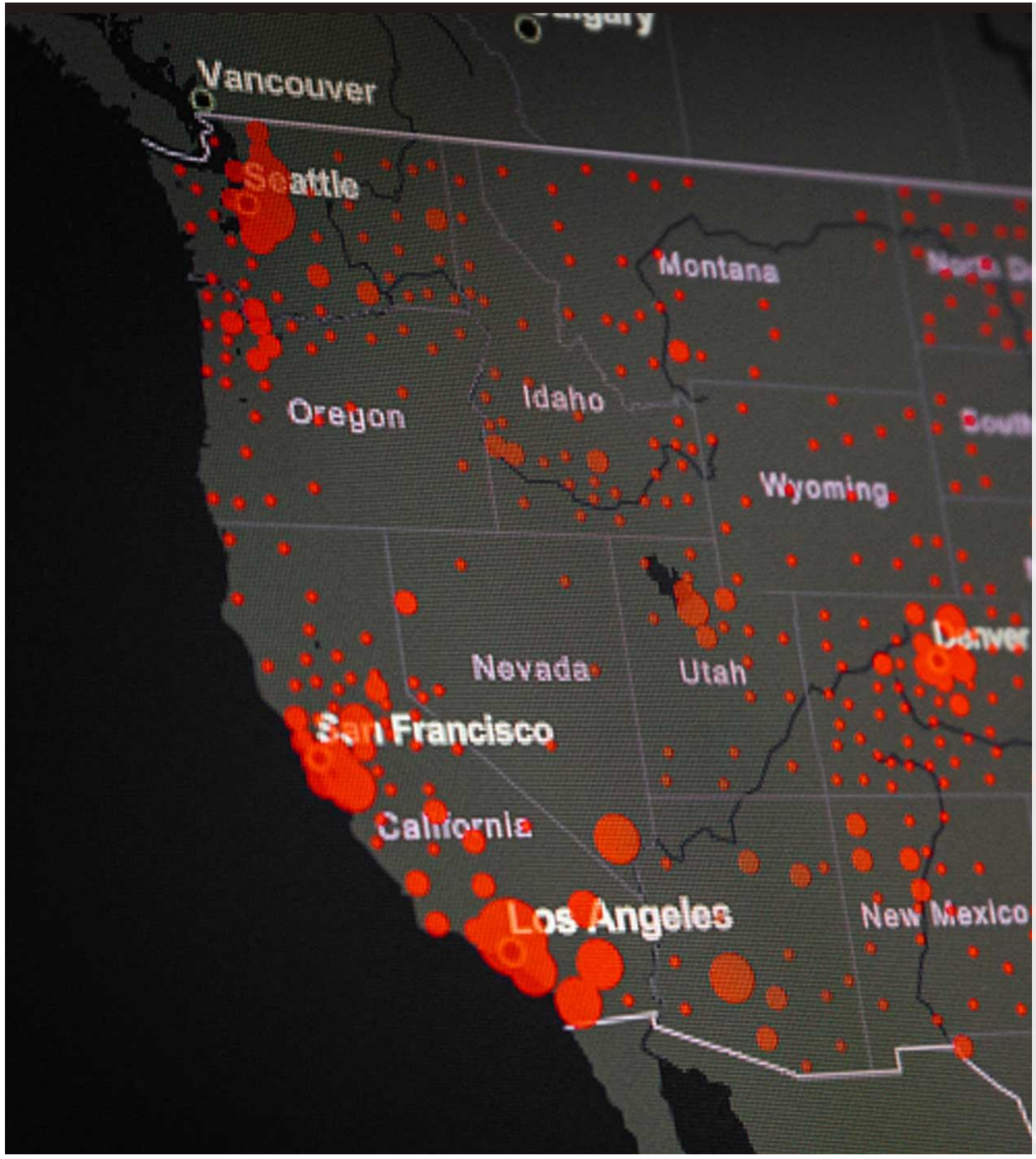
# Openness to New Destinations, Next 3 Months

**Question: IN THE NEXT 3 MONTHS, if a good opportunity presented itself, how likely would you be to take a leisure trip THAT YOU HAVEN'T ALREADY CONSIDERED?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

Approximately 30 percent of American travelers reported that they are likely to consider a leisure trip that they haven't already considered if a good opportunity was presented in the next three months.



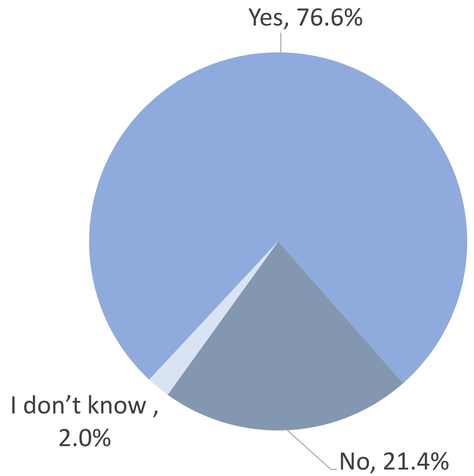



# Section II:

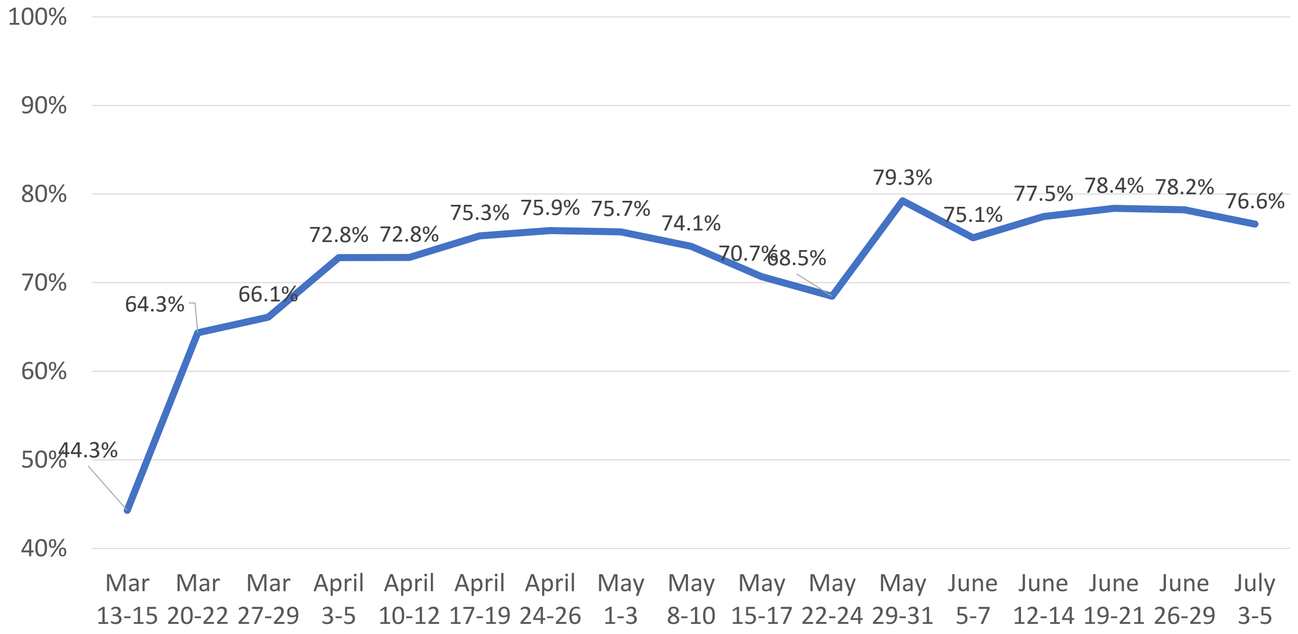
# The Pandemic's Impact on Travel

# 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.)**




This week, 76.6 percent of American travelers reported having had their travels impacted by the coronavirus.

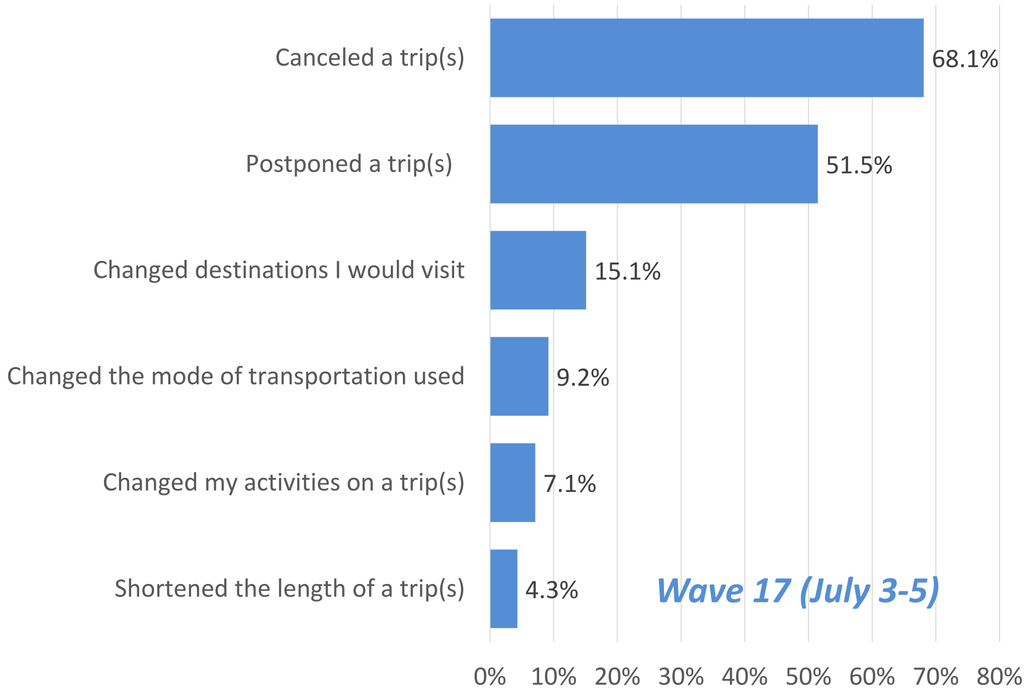



*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

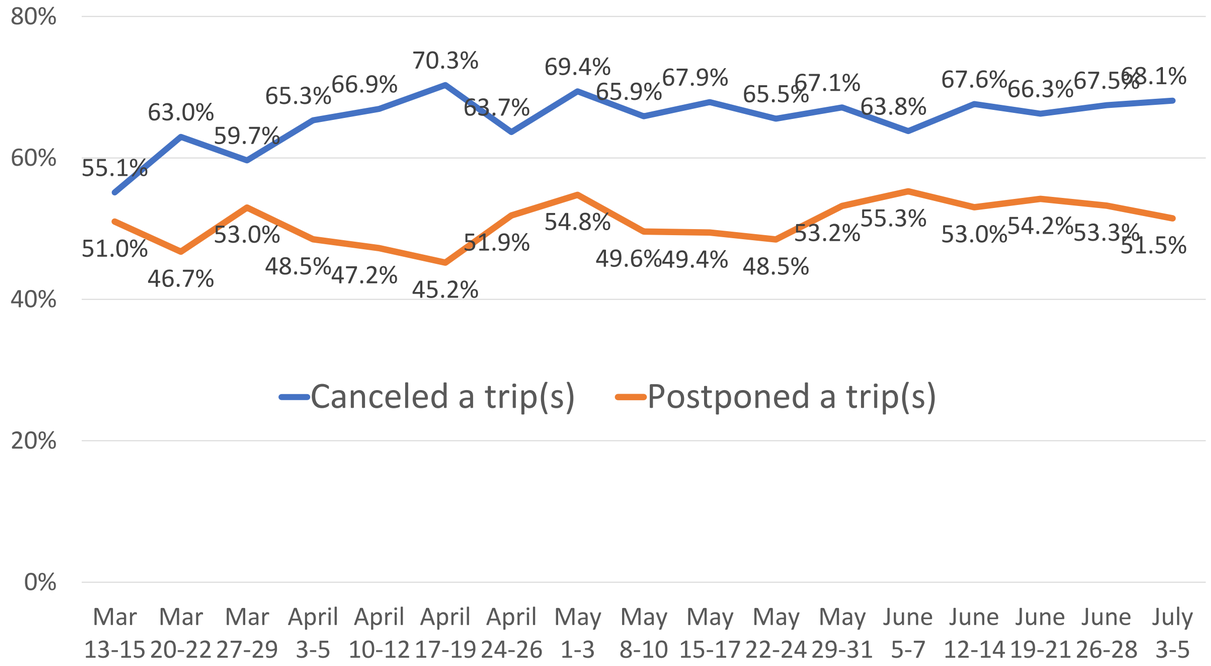
# How the Coronavirus has Impacted Travel

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

Due to the coronavirus situation, I have_____.




This week, the percentage of American pandemic-affected travelers reporting they have cancelled trips due to the coronavirus is 68.1 percent.



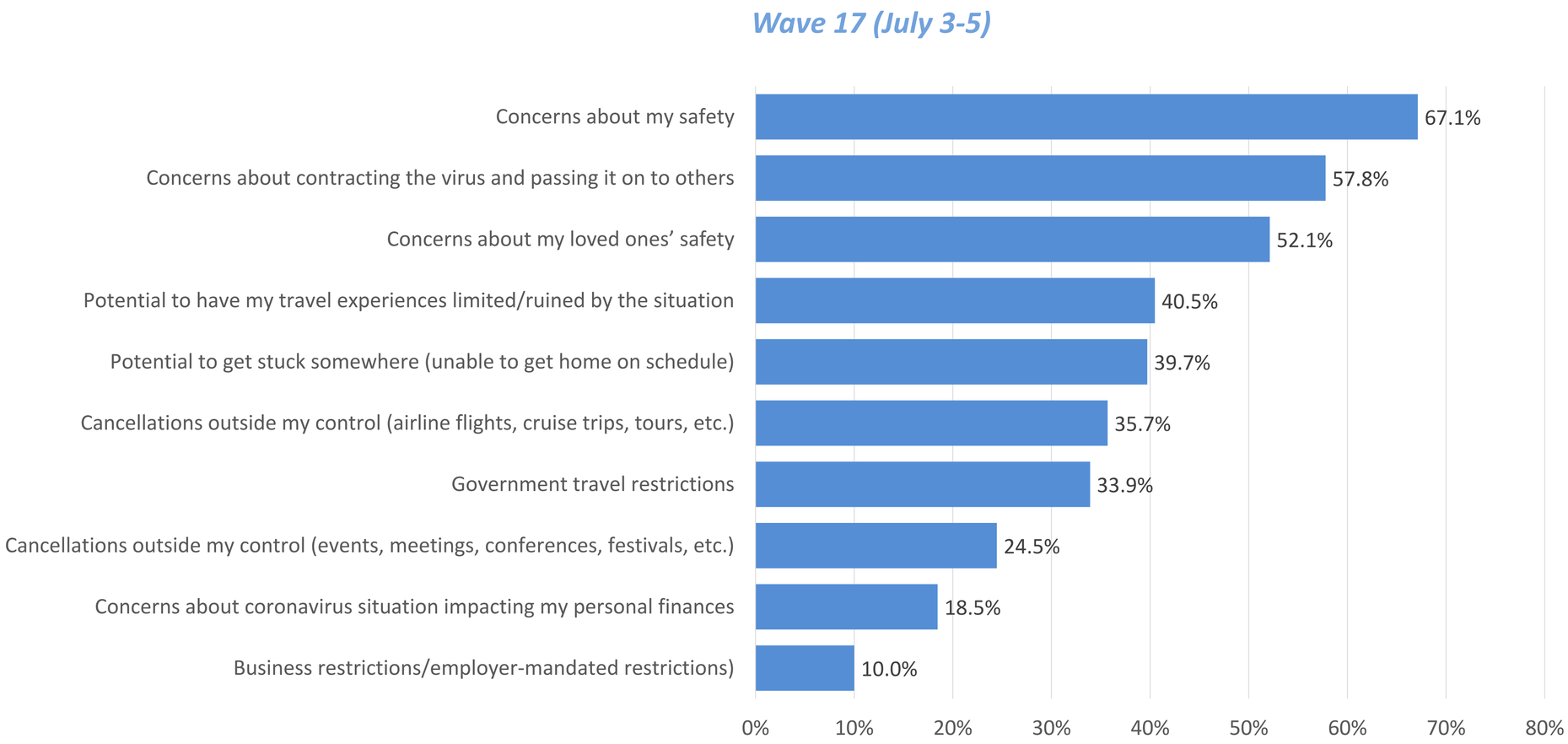

*(Base: All respondents with travel impacted by the pandemic, 553, 770, 795, 890, 937, 929, 903, 926, 903, 871, 843, 993, 923, 952, 957, 974 and 1,050 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14,19-21,26-28, and July 3-5, 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 over two-thirds of respondents citing it as a reason (67.1 percent—up from 64.6 percent last week).

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

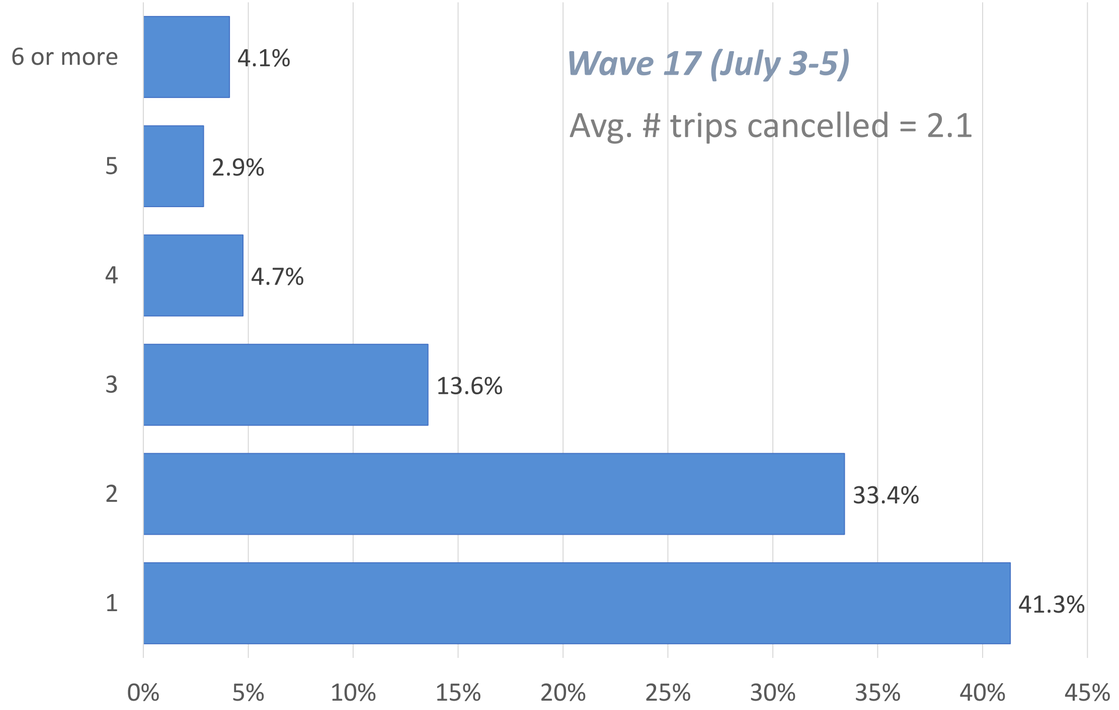
*(Base: Wave 17. Respondents whose travel was impacted by the coronavirus, 1,045 completed surveys. Data collected July 3-5, 2020)*



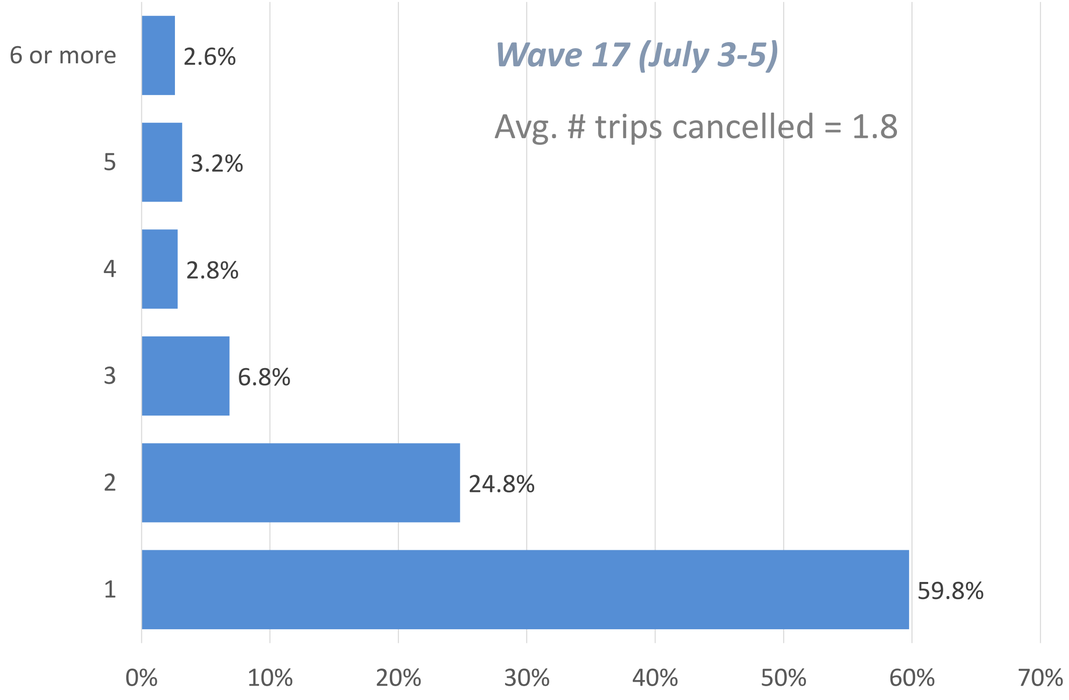
# Trips Cancelled/Postponed

**The average American traveler who cancelled a trip has done so for 2.1 trips as a result of the outbreak.** Meanwhile, the typical traveler has postponed 1.8 trips due to the crisis.

**Question: How many trips did you cancel?**




**Question: How many trips did you postpone?**

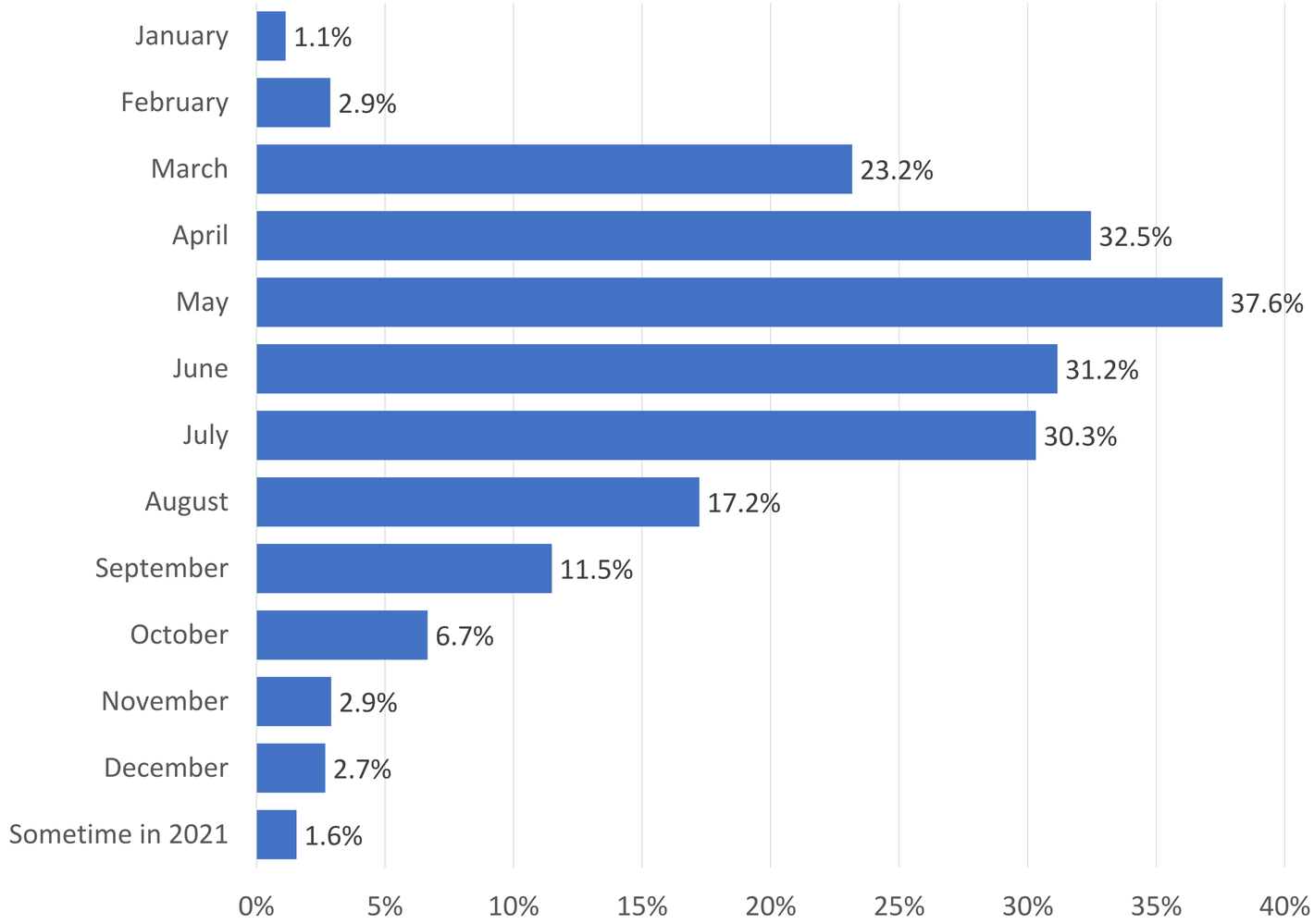



*(Base: Wave 17, Respondents cancelling/postponing a trip, 728/535 completed surveys. Data collected July 3-5, 2020)*

# Month of Trip Cancellation

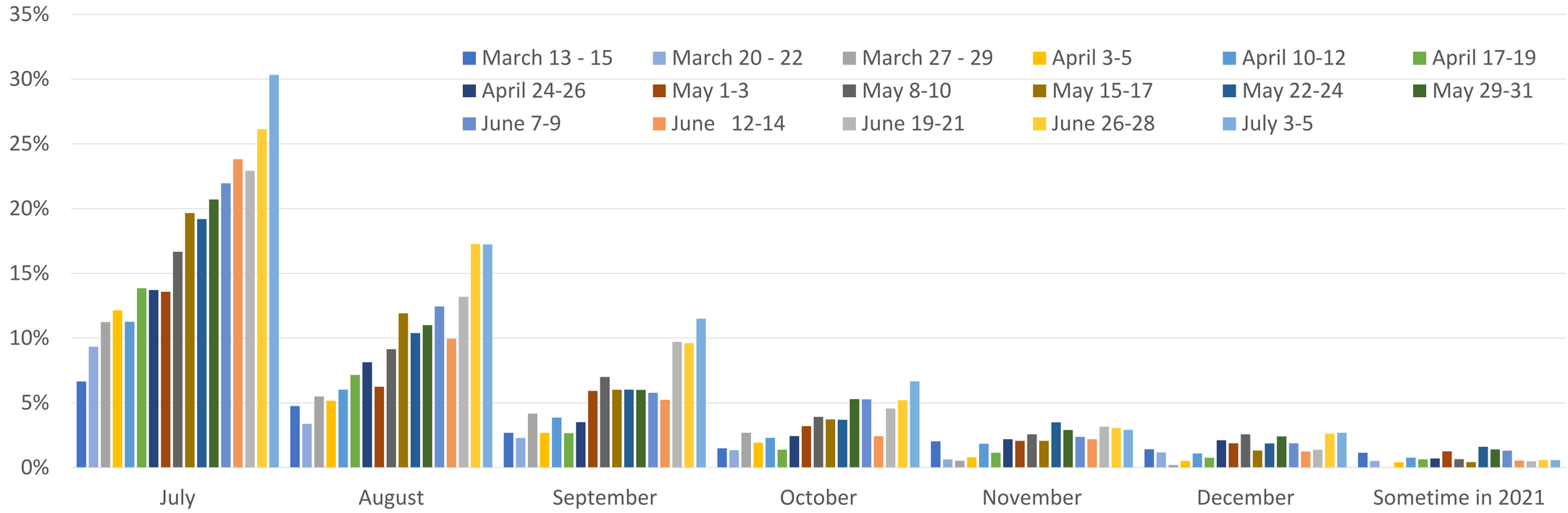
**Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)**

*(Base: Wave 17. Cancelling trips, 728 completed surveys. Data collected July 3-5, 2020)*



# Month of Trip Cancellation

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

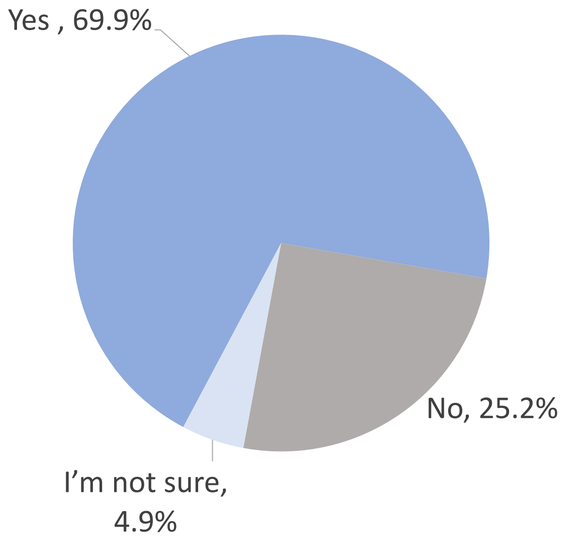



*(Base: Cancelling trips, 292, 477, 506, 580, 623, 643, 582, 640, 605, 582, 554, 651, 616, 645, 640, 665 and 728 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28 and July 3-5, 2020)*

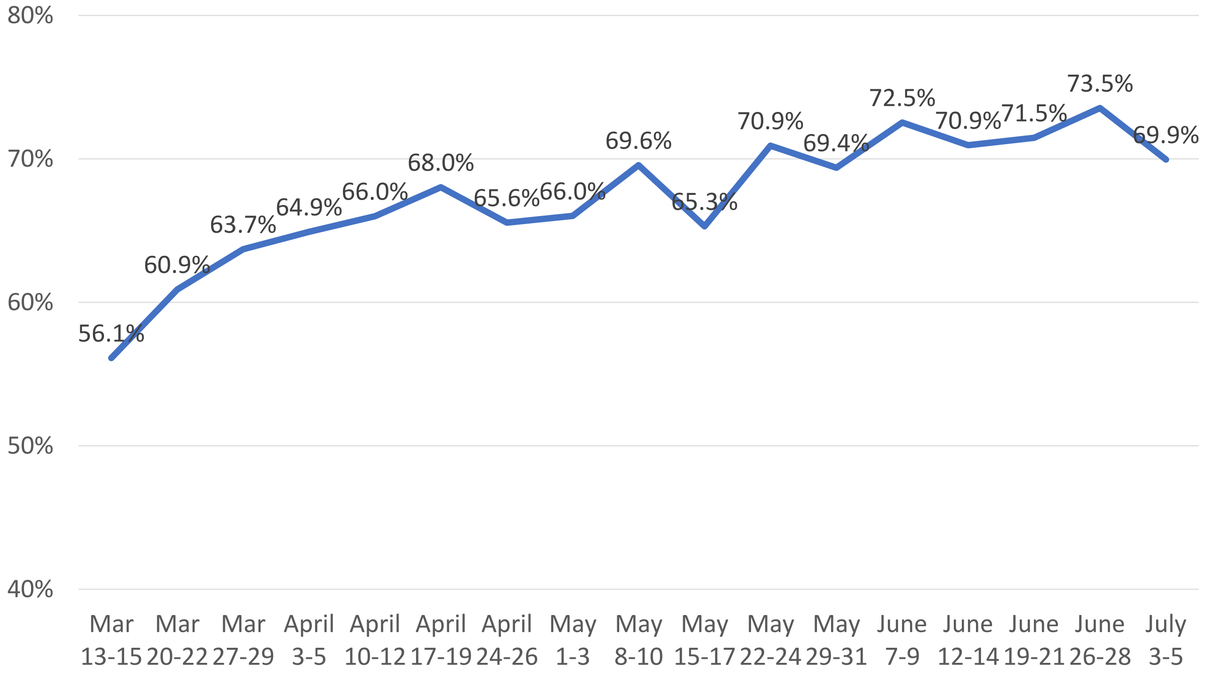
# Did Traveler Get Full Refunds?

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

*Wave 17 (July 3-5)*




**The proportion of travelers who were fully refunded for cancelled trips decreased to 69.9 percent this week.**



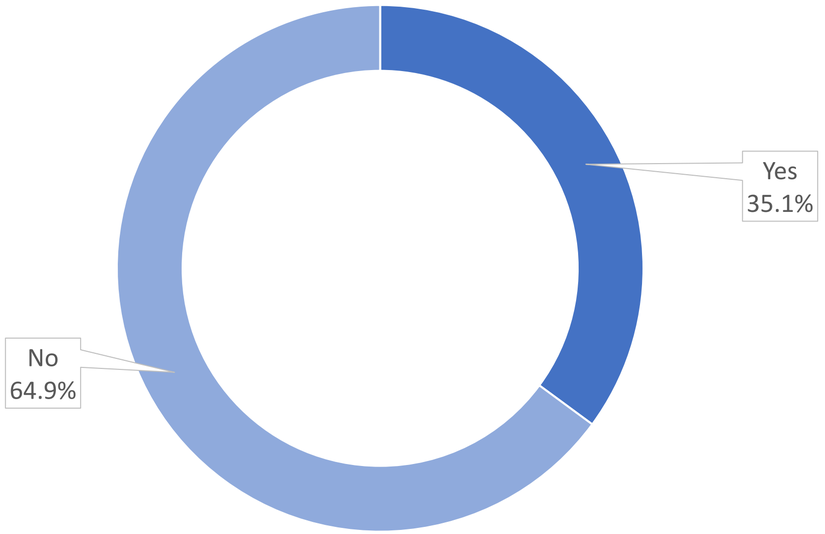

*(Base: Wave 1y. Cancelling trips, 728 completed surveys. Data collected July 3-5, 2020)*

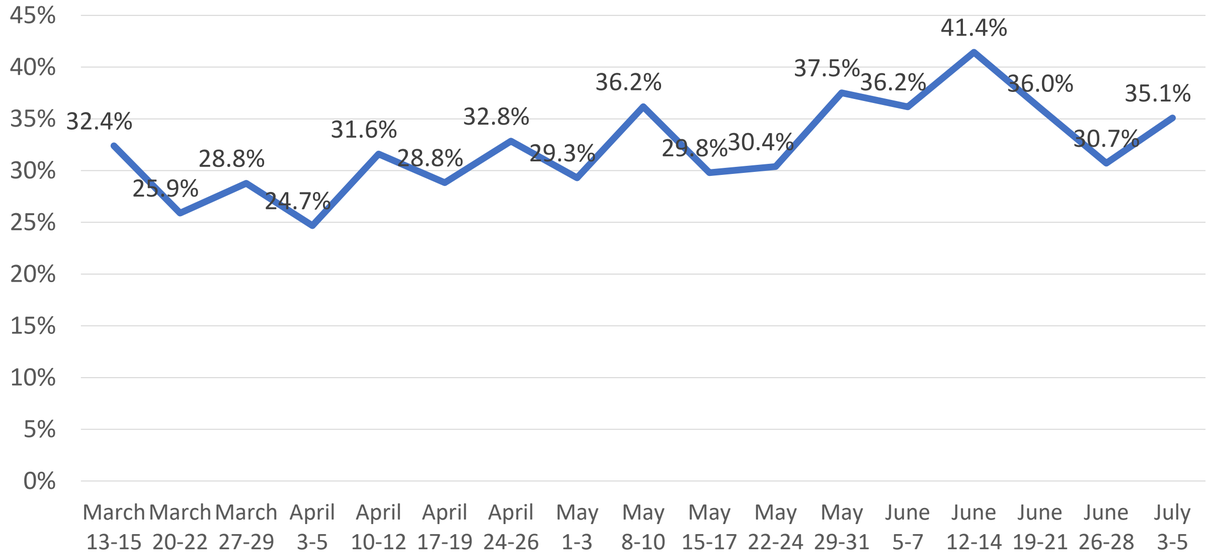
# Were Postponed Trips Rescheduled?

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

About two-thirds of American travelers who have postponed a trip due to the pandemic have not yet rescheduled it.

*Wave 17 (July 3-5)*

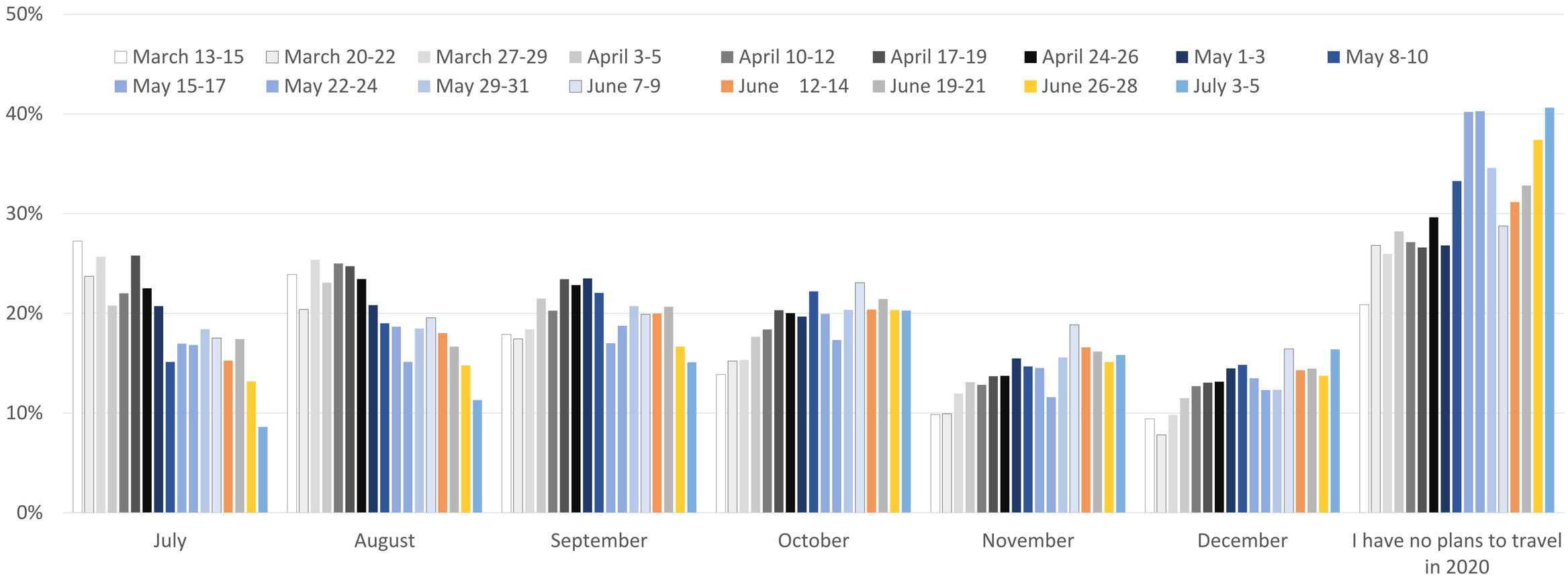



*(Base: Postponing trips, 277, 354, 404, 433, 438, 436, 463, 506, 442, 434, 413, 535, 498, 495, 517, 529 and 535 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 May 1-3, 8-10, 15-17, 22-24, 29-31, June 7-9, 12-14, 19-21, 26-28 and July 3-5, 2020)*

# Upcoming Travel Plans

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

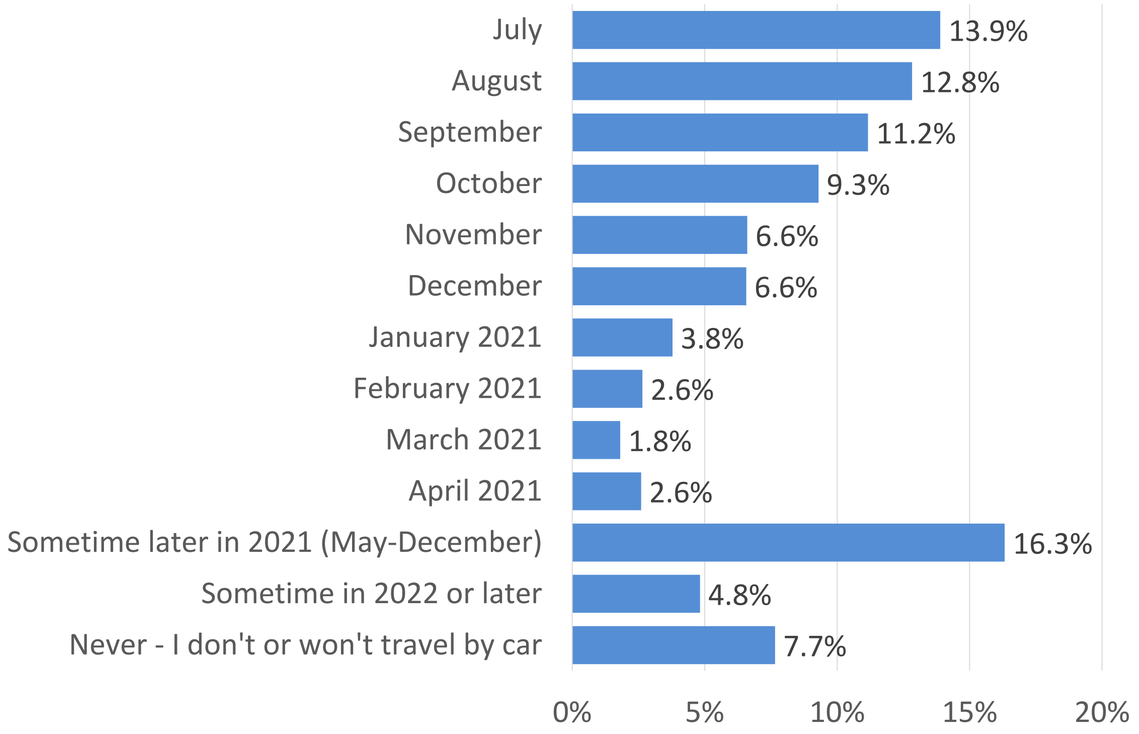



*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

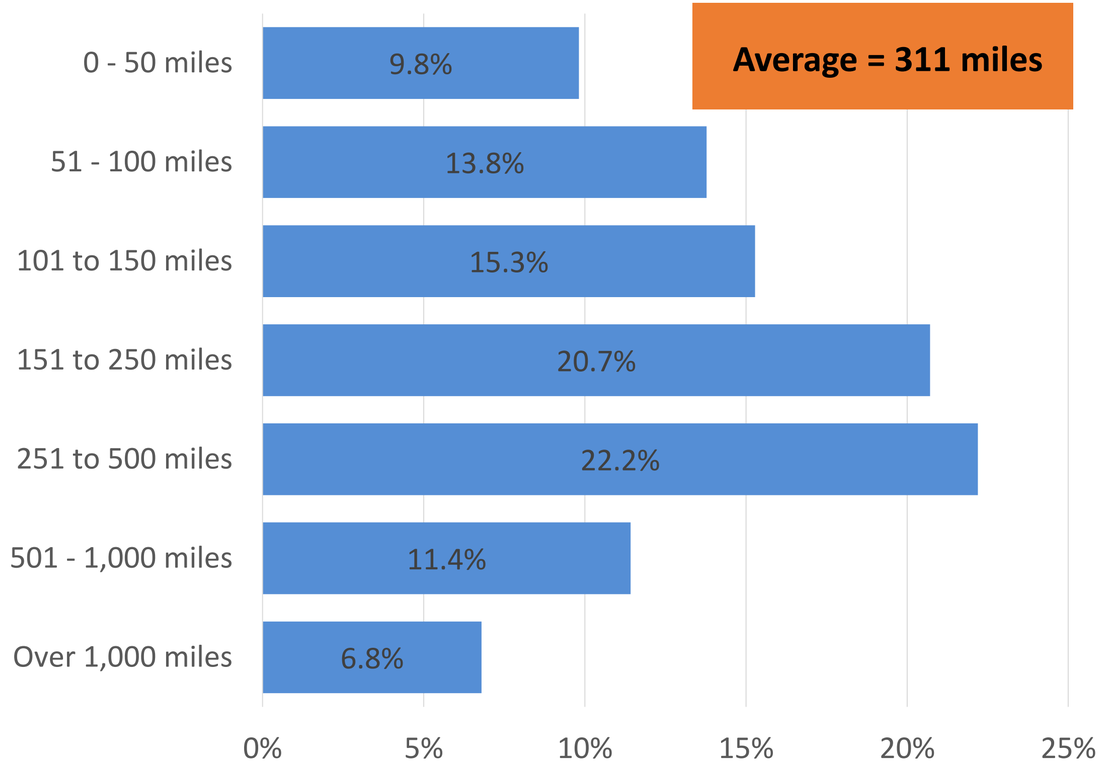
# Road Trips Expected

**Only 13.9 percent of American travelers expect they will take their next road trip this month.** On average, they will likely travel 311 miles away from home on their next road trip.

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




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

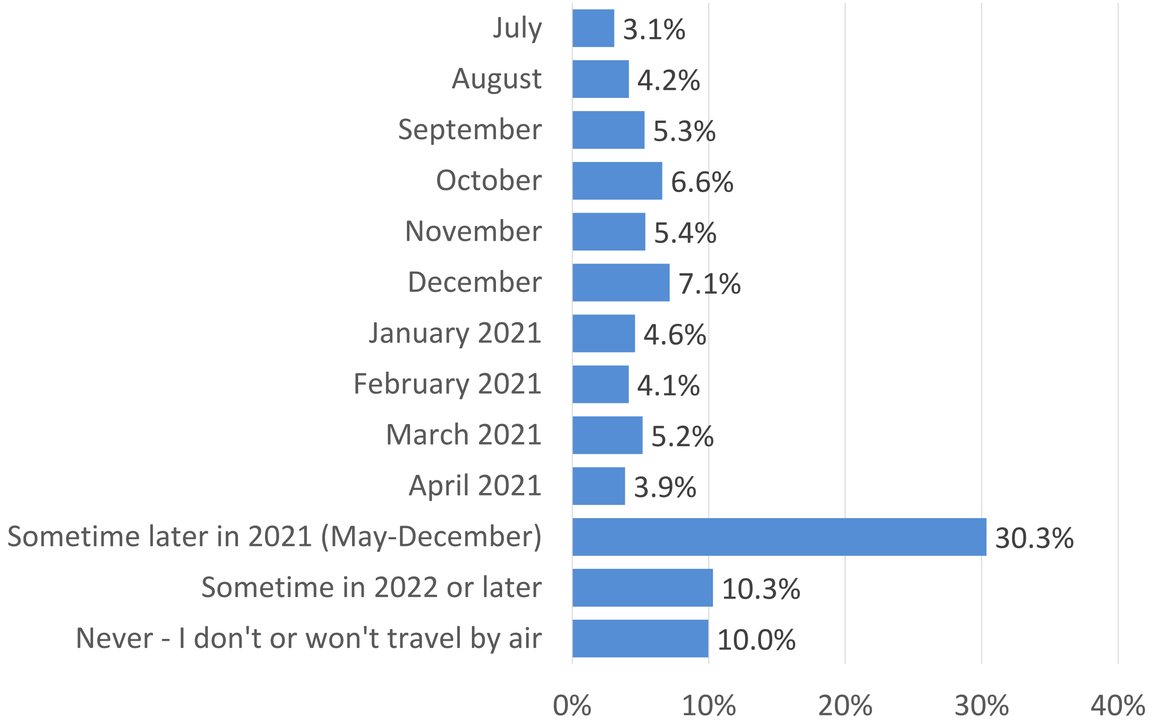



*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

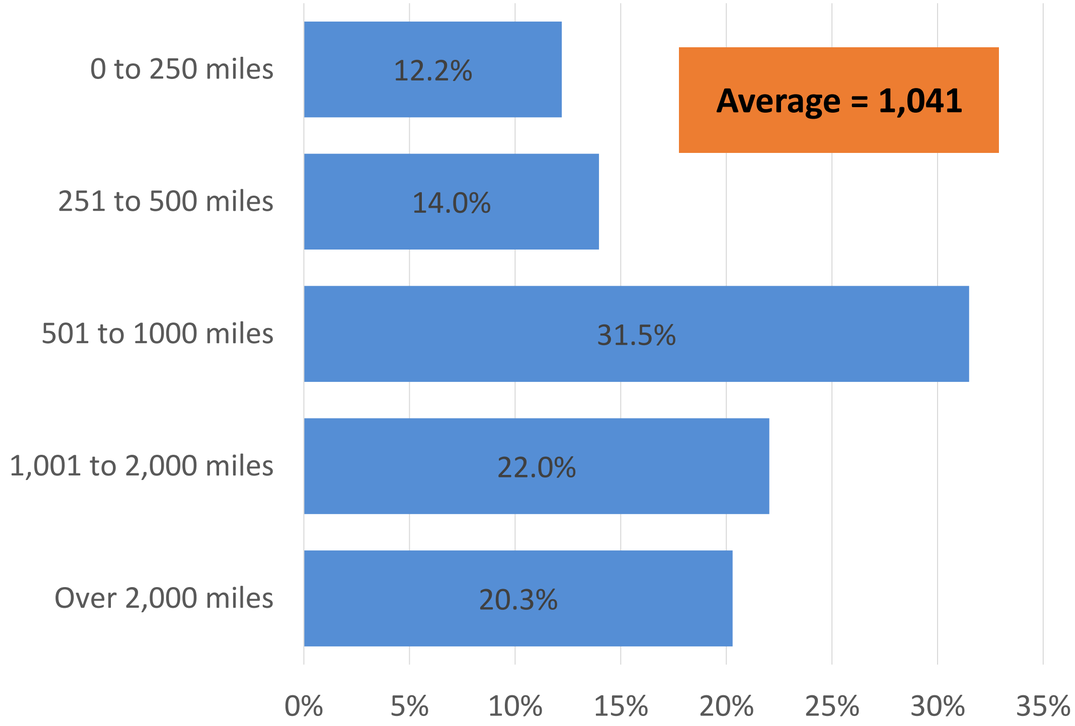
# Commercial Airline Trips Expected

**American travelers' next commercial airline trip is further into the future than their next road trip, with 30.3 percent who plan to take an airline trip sometime later in 2021.** They plan to travel an average of 1,041 miles away from home on their next air trip.

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




**Question: On your next TRIP ON A COMMERCIAL AIRLINE, how far away from home will be likely you travel?**




*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

# Section III:

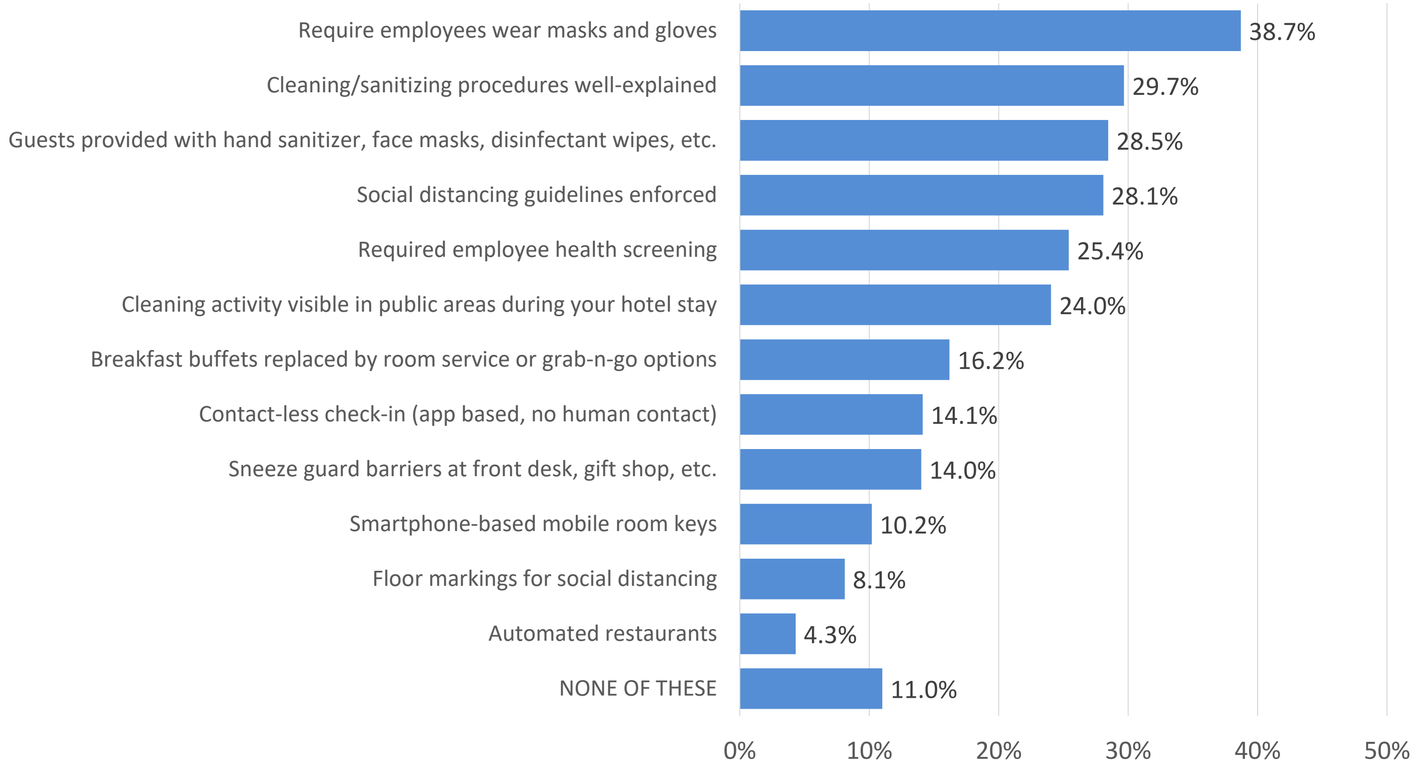
# Opinions on Hotel Usage

# Desired Hotel Sanitation Practices

**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. (Select as many as 3)**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

When American travelers were asked about the operational practices that would make them feel most confident that the hotel is looking out for their health, hotel employees wearing masks and gloves topped the list. They also want the cleaning procedures clearly communicated, socially distancing enforced, and to be provided with hand sanitizer and masks.

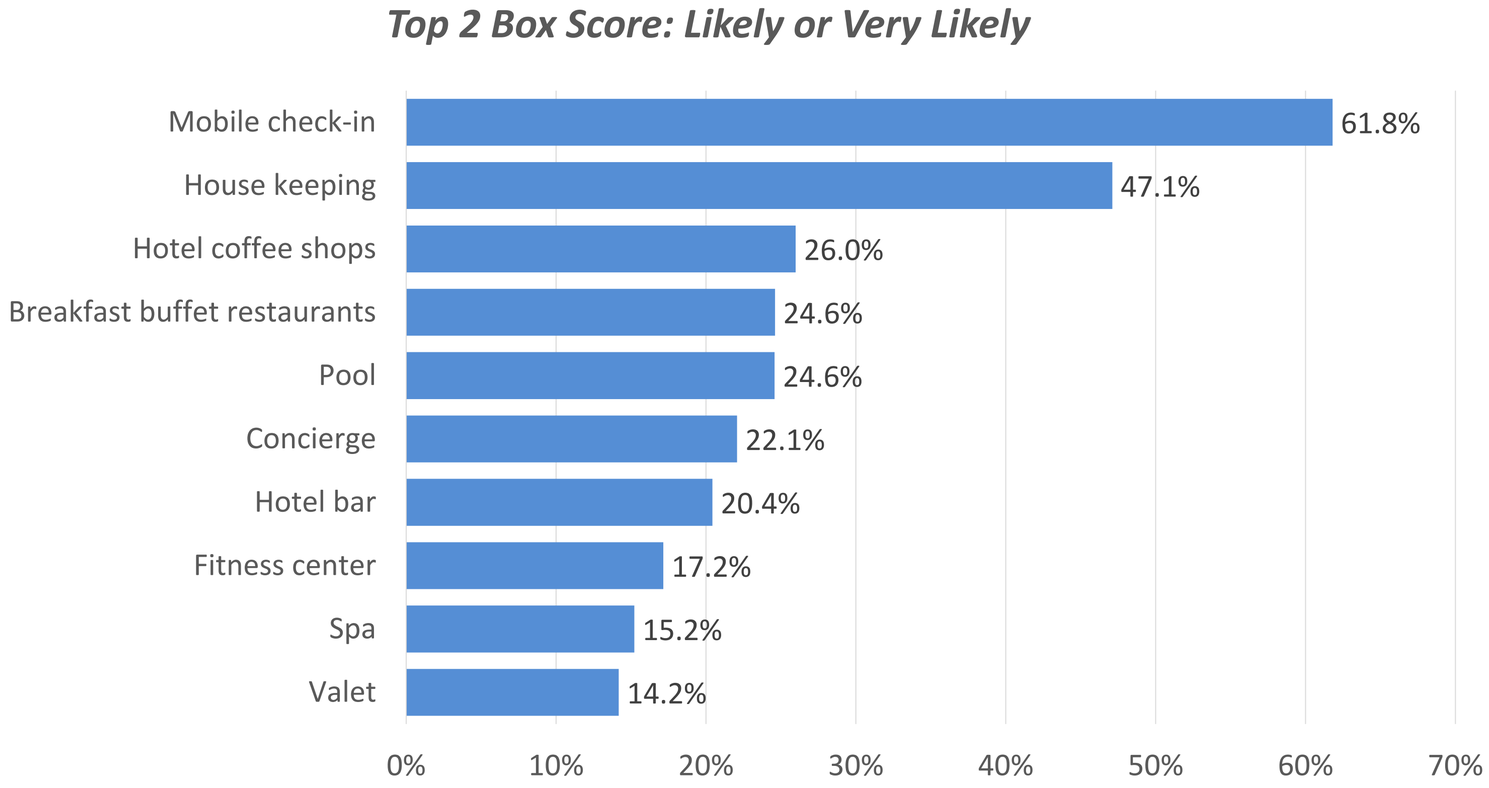


# Likelihood of Using Hotel Services on Next Trip

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

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

When it comes to the services they will use the next time they stay in a hotel, half or more of American travelers reported that they are likely or very likely to use housekeeping and mobile check-in.

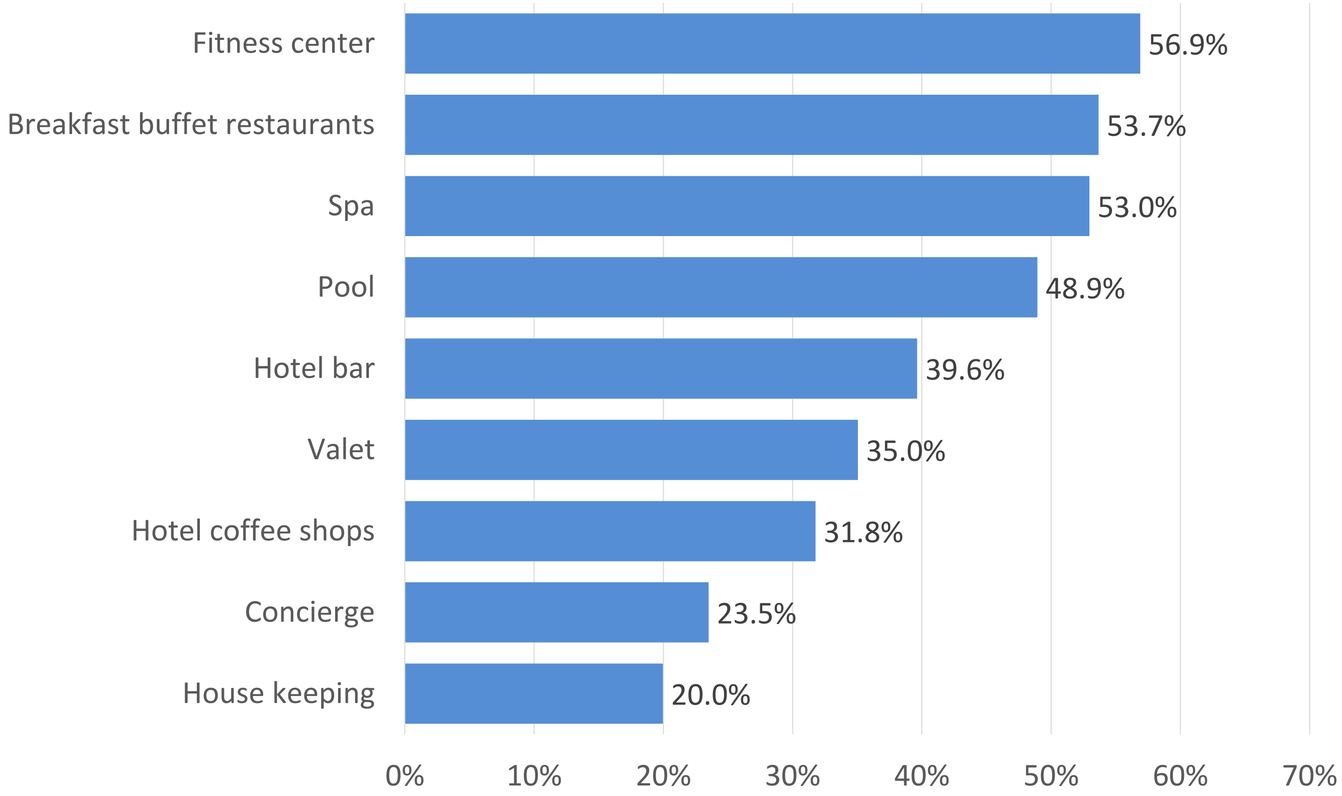


# Hotel Services Travelers are Less Likely to Use Due to Pandemic

**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: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

The fitness center, breakfast buffet restaurants, spa and pool are the hotel features that Americans are less likely to use during their next hotel stay as a result of the coronavirus situation.



# Section IV:

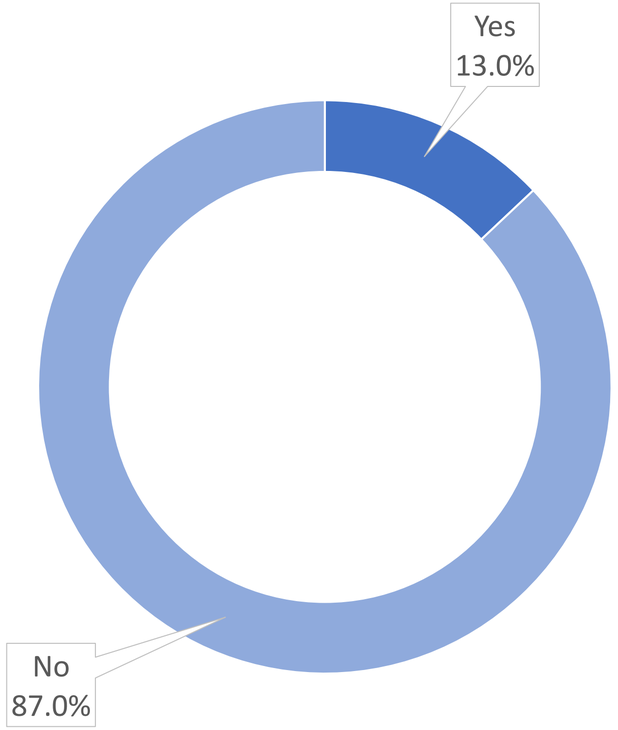
# The Upcoming Ski Season

# Ski/Snowboard Trips in Past 3 Years

**Question: Have you taken an overnight ski or snowboard vacation in the past three (3) years?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

13.0 percent of American travelers have taken an overnight ski or snowboard vacation in the past three years.

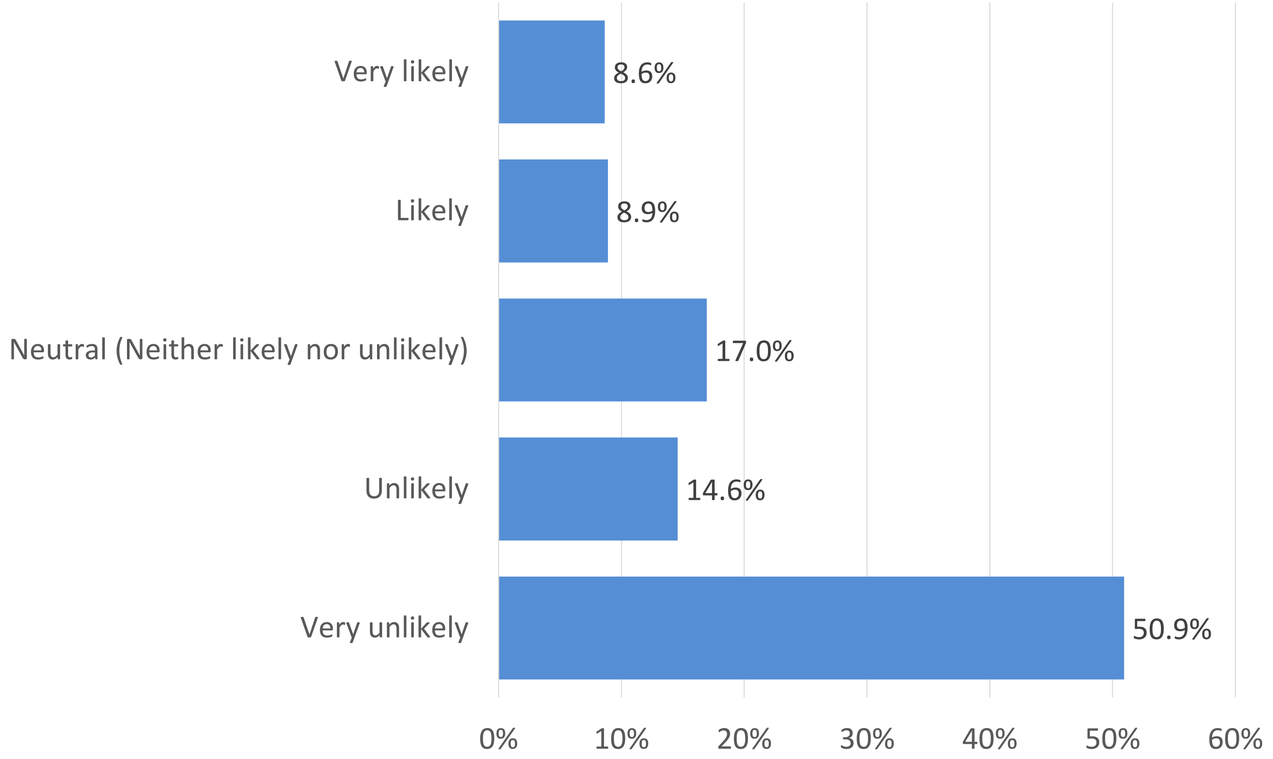


# Likelihood of Taking a Ski/Snowboard Trips in Next 3 Years

**Question: How likely are you to take an overnight ski or snowboard vacation in the NEXT THREE (3) YEARS?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

In total, 17.5 percent of American travelers reported that they are likely or very likely to take an overnight ski or snowboard vacation in the next three years.

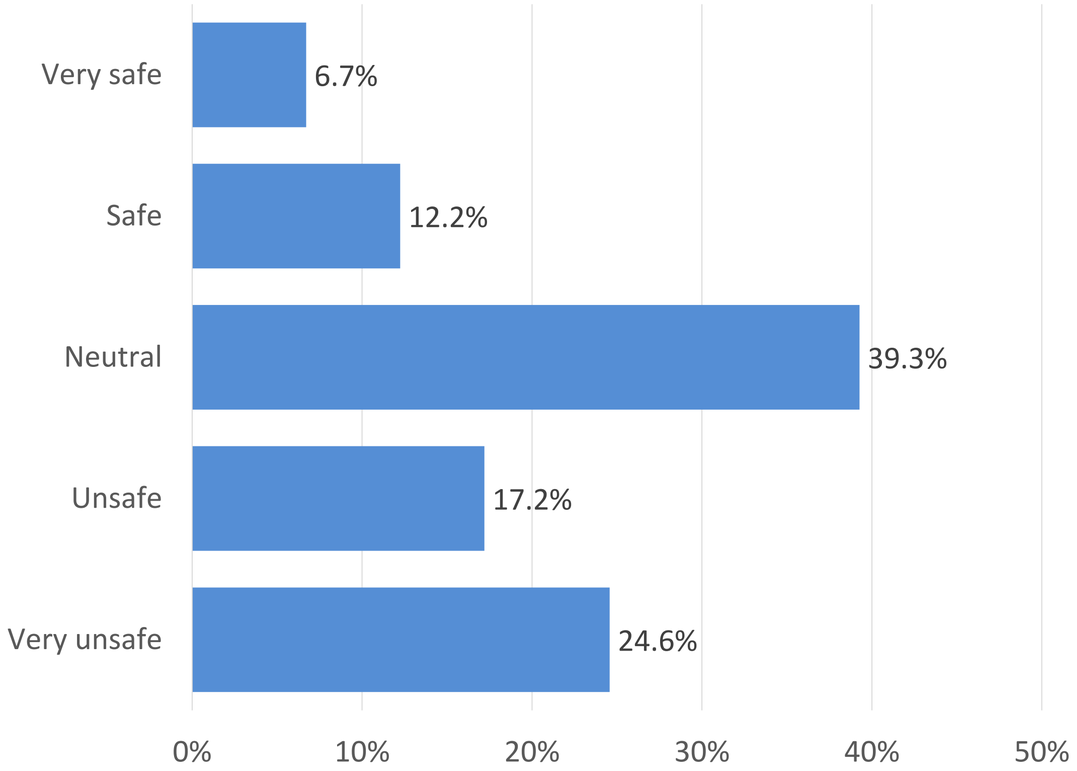


# Perceived Safety of a Ski/Snowboard Trip This Season

**Question: At this moment, how safe would you feel taking a ski/snowboard vacation next season (Winter 2020/2021)?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

While one-in-five Americans would feel safe taking a ski or snowboard vacation in the next Winter season (19.0%), more than double would feel unsafe (41.8%).

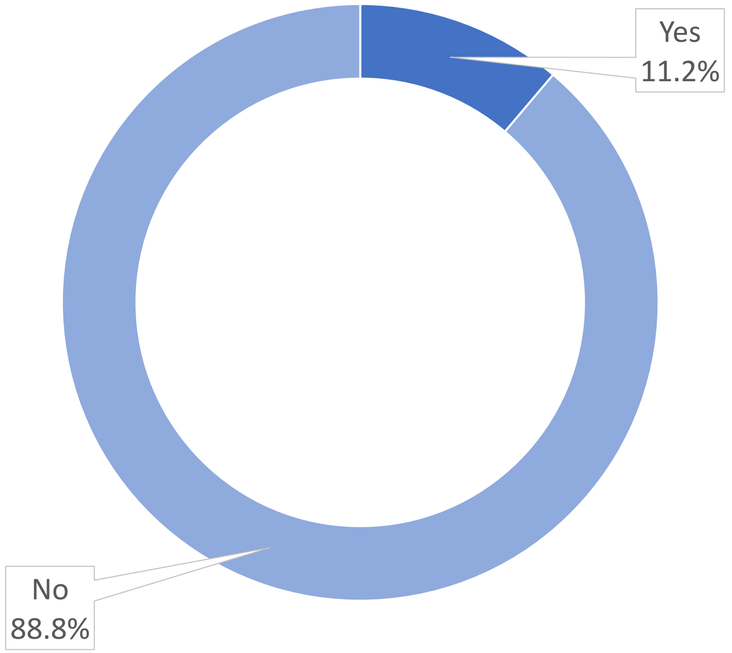


# Regularly Visited Ski/Snowboard Destinations

**Question: Is there a specific destination you regularly visit on overnight ski/snowboard-related trips?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

One-in-ten respondents regularly visit a specific destination for ski/snowboard-related trips.

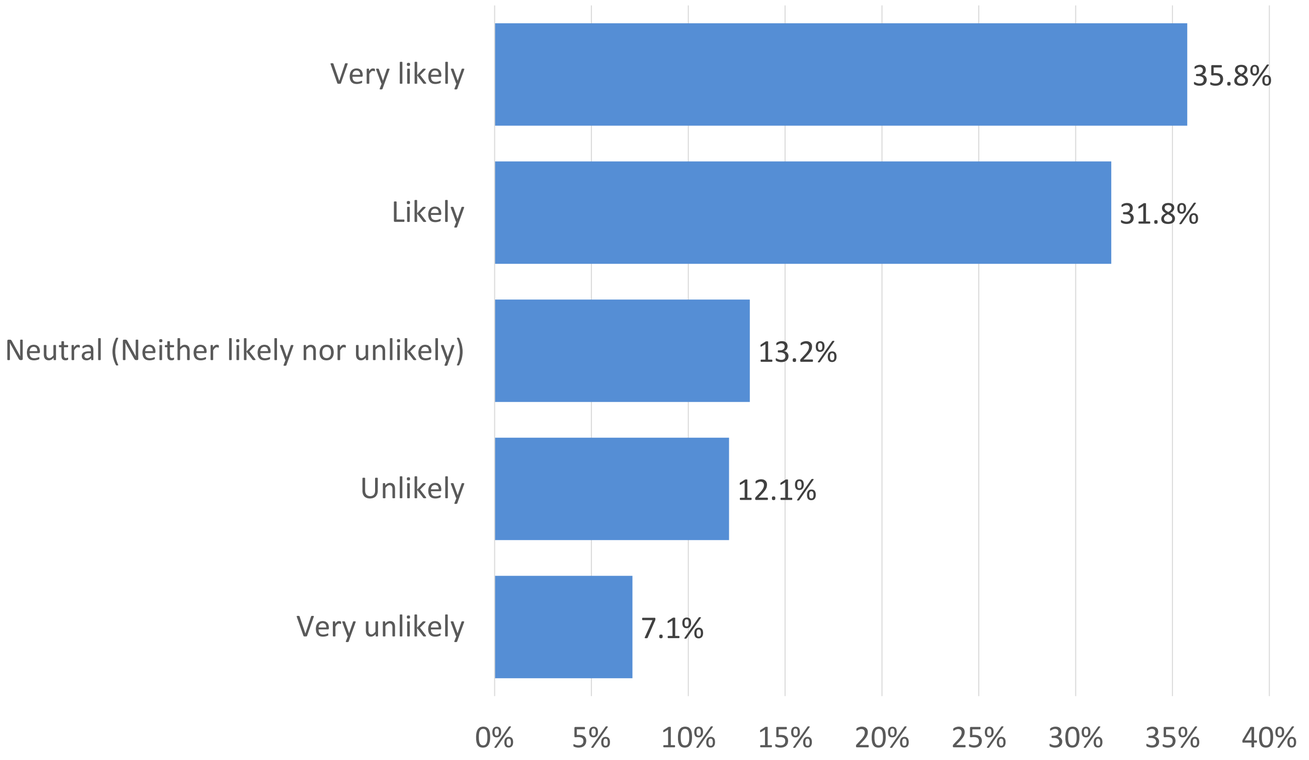


# Likelihood to Return this Season to Regularly-visited Ski/Snowboard Destination

**Question: How likely are you to take an overnight ski/snowboard-related trip to that destination next season (Winter 2020/2021)?**

*(Base: Wave 17 data. Respondents with a regularly visited ski/snowboard destination, 134 completed surveys. Data collected July 3-5, 2020)*

Two-thirds of those who regularly visit a specific ski/snowboard destination are likely to take an overnight ski trip to that destination next season (67.6%).

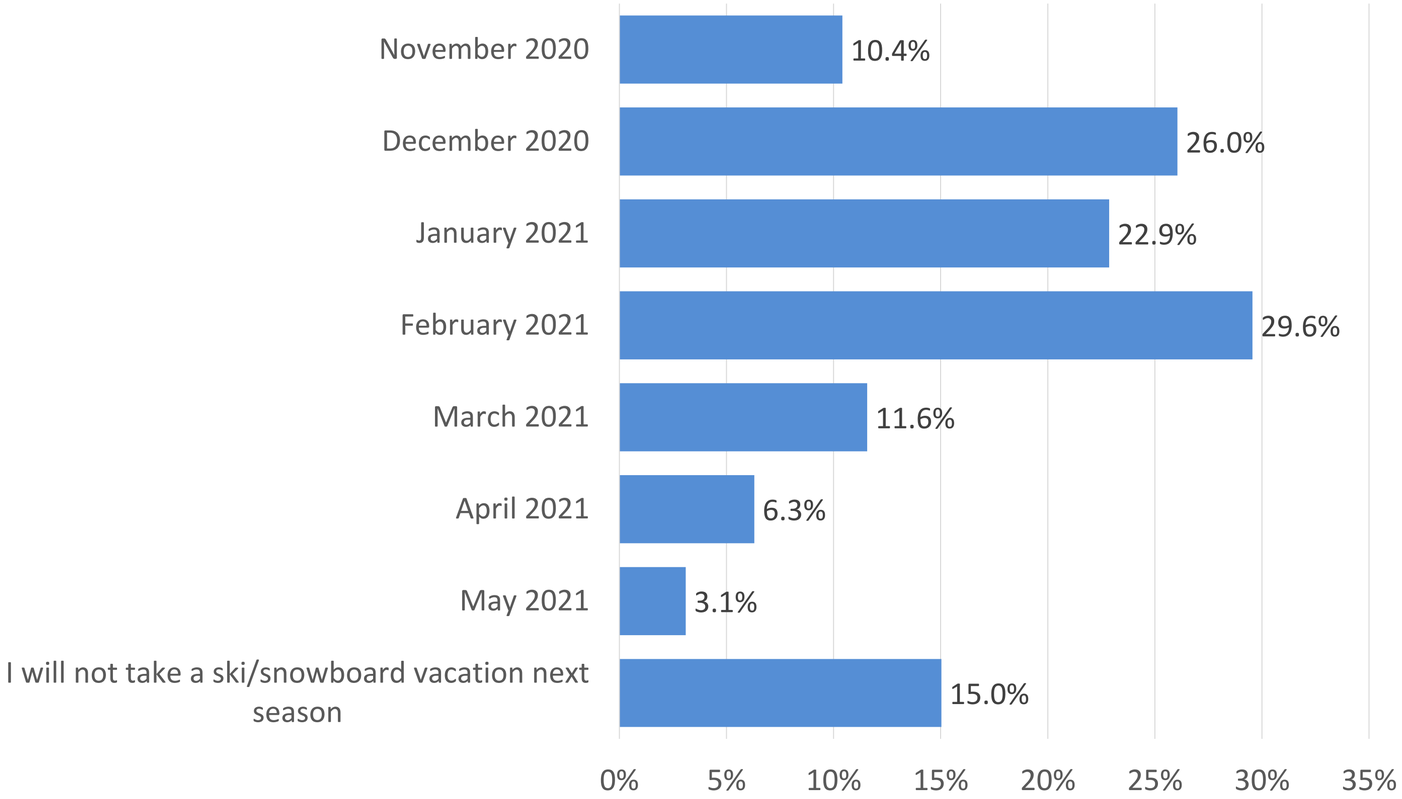


# Month of Likely Ski/Snowboard Trip

**Question: If you were going to take an overnight ski or snowboard vacation this next season, in which month(s) would you most likely take this trip?**

*(Base: Wave 17 data. Respondents likely or very likely to take a ski/snowboard trip in the next 3 years, 206 completed surveys. Data collected July 3-5, 2020)*

At this point in time, it appears that December, January and February will be the months in the upcoming season with the highest volume of American traveler ski/snowboard vacations.

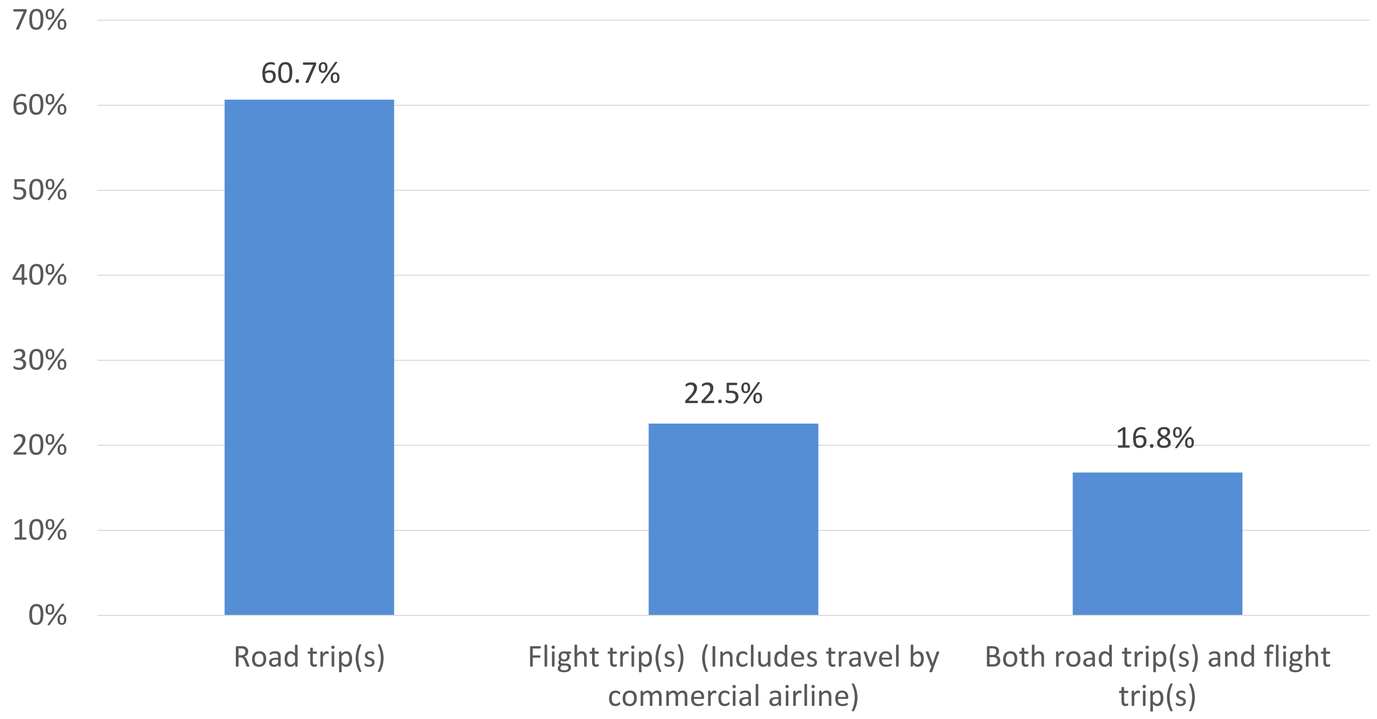


# Mode of Travel: Ski/Snowboard Trips

**Question: Thinking of your ski/snowboard-related overnight trips this year, which types of travel are you likely to take?**

*(Base: Wave 17 data. Respondents who are likely to take a ski/snowboard trip this year, 84 respondents. Data collected July 3-5, 2020)*

Road trips dominate the mode of transportation used by American ski/snowboard travelers, yet nearly 40 percent will likely travel by plane this season for such a trip.

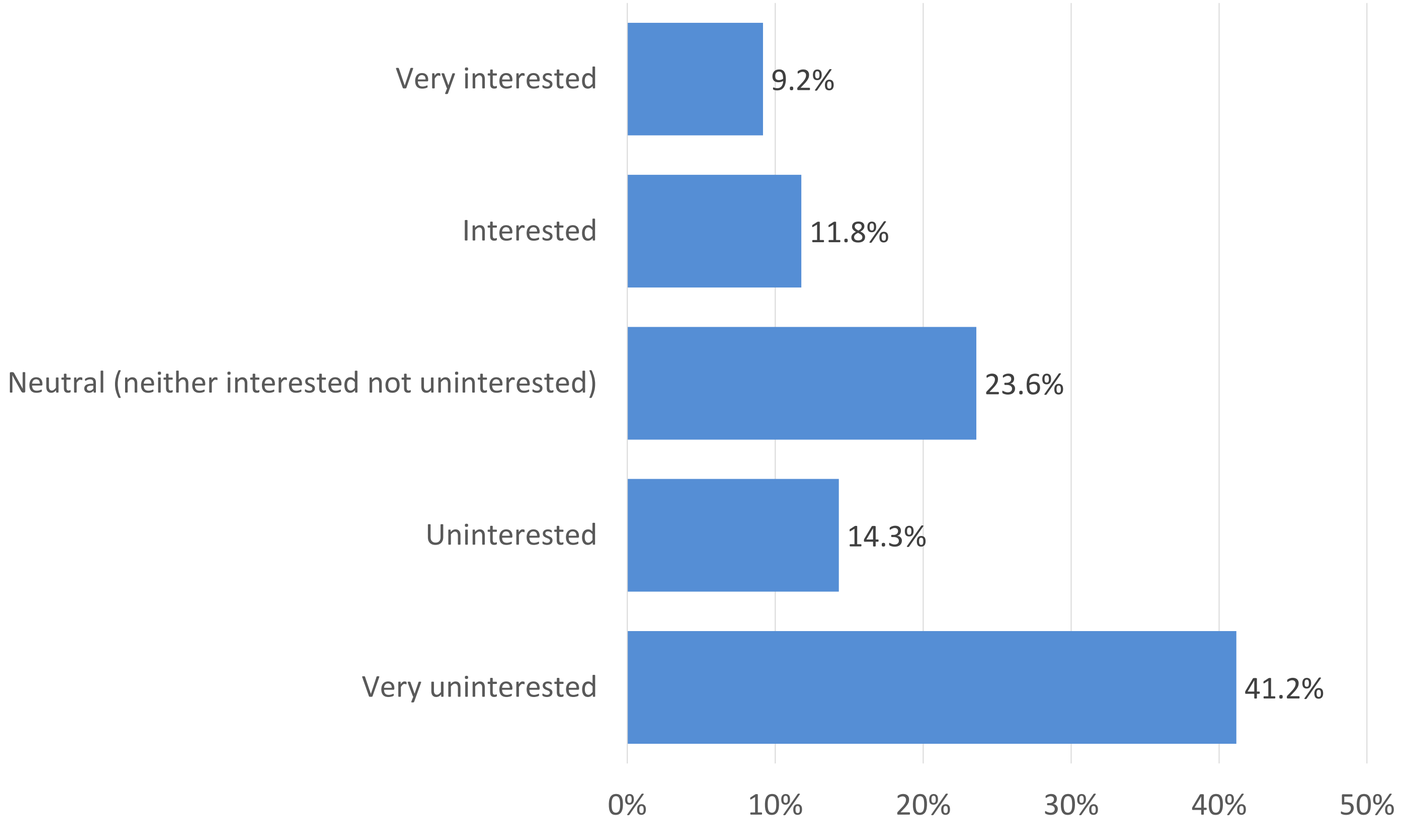


# Interest in New Ski/Snowboard Destinations

**Question: How interested are you to visiting new ski/snowboard destinations (i.e., ones that you have not previously visited)?**

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

American travelers appear to be more interested in their current destinations than finding new ones. Only 21.0 percent said they were interested or very interested in visiting new destinations.

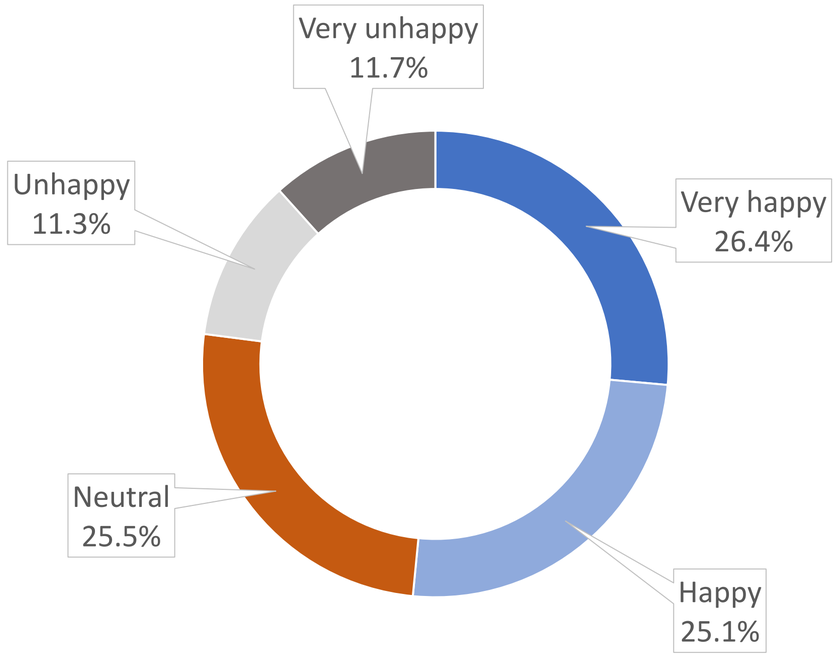


# Section V:

# Opinions on Travel & the Coronavirus

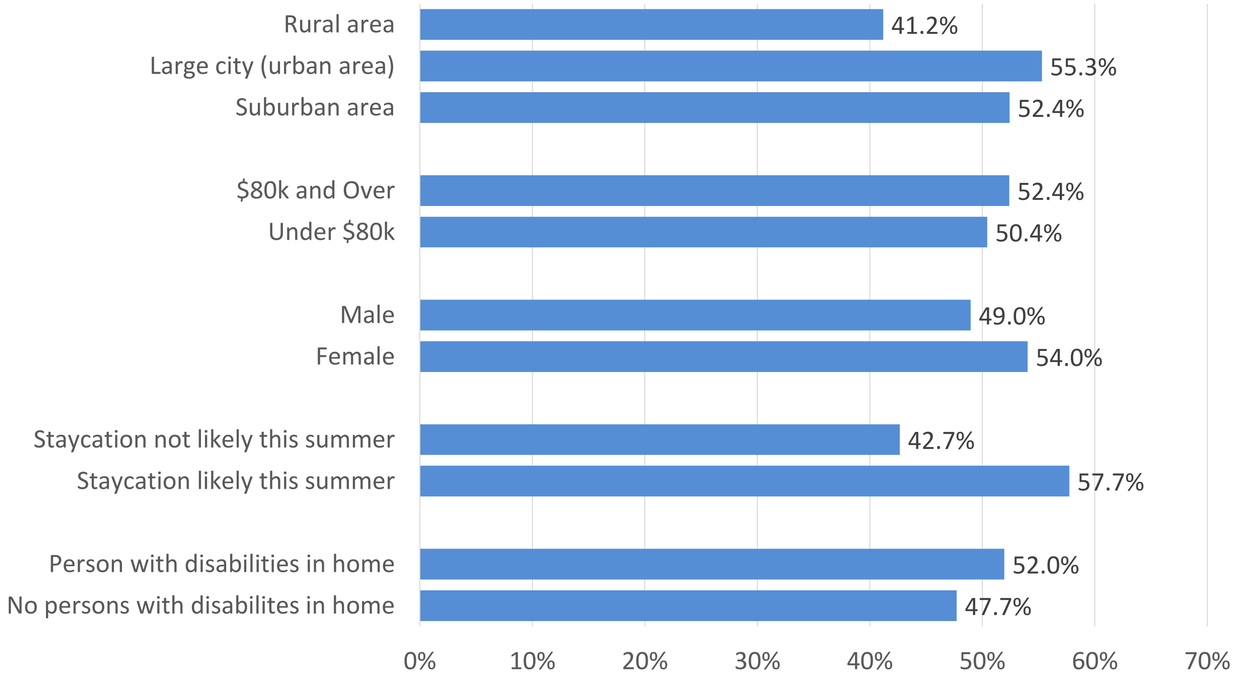
# Opinions on Tickets/Fines for Not Wearing Masks

**Question: Which best describes how you would feel if a destination you wanted to visit was giving tickets/fines to people who do not wear face masks in public?**




Over half of Americans would feel happy if a destination they wanted to visit was issuing fines to those who do not wear face masks in public. A profile of those who would feel happy is presented below.

***Top 2-Box Scores (% Happy or Very Happy)***



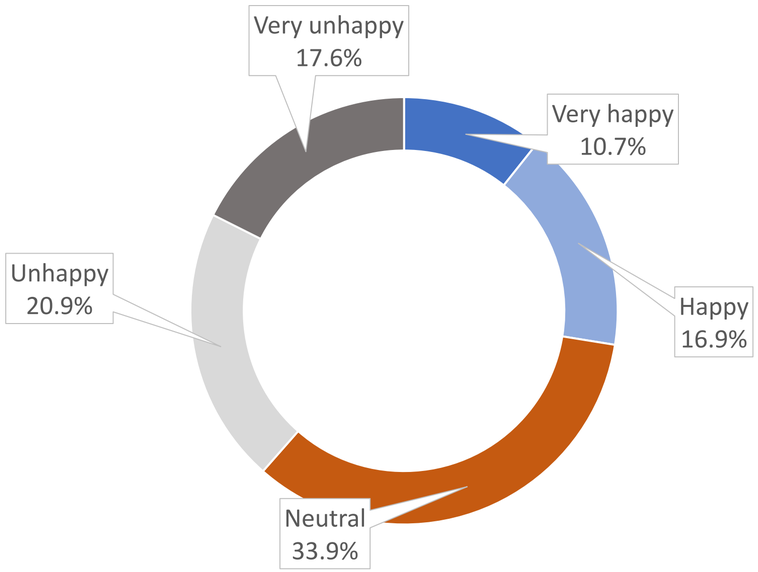

*(Base: Wave 17 data. All respondents, 1,365 completed surveys. Data collected July 3-5, 2020)*

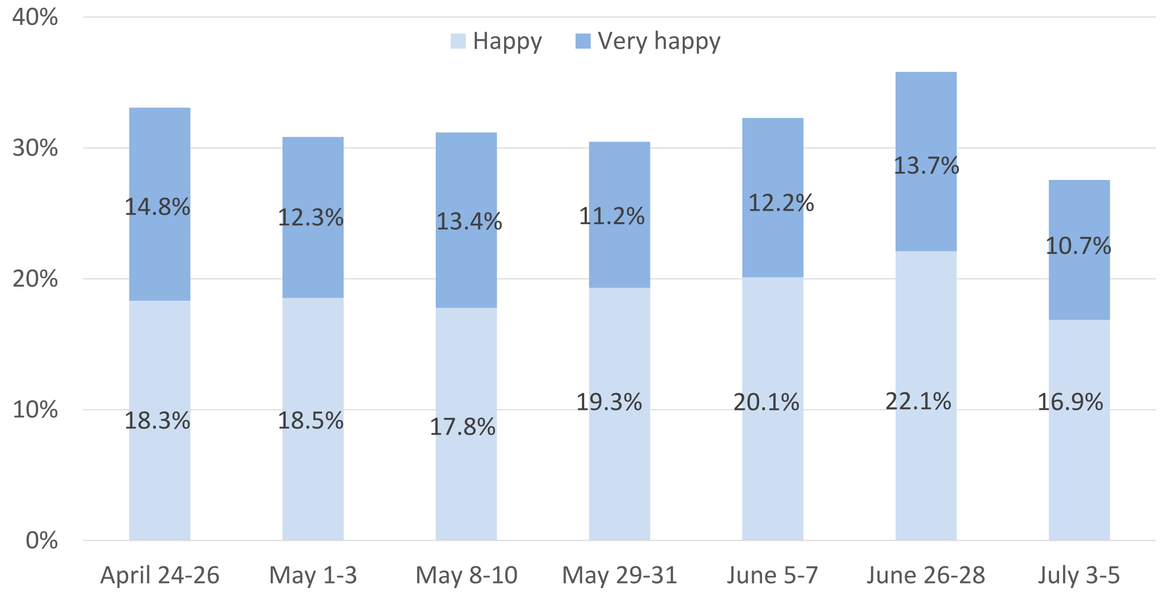
# Advertising Their Own Communities

**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?**

27.5 percent of American travelers would feel happy if they saw an ad promoting their community as a place for tourists to visit, down from 35.8 percent last week.

*Wave 17 (July 3-5)*



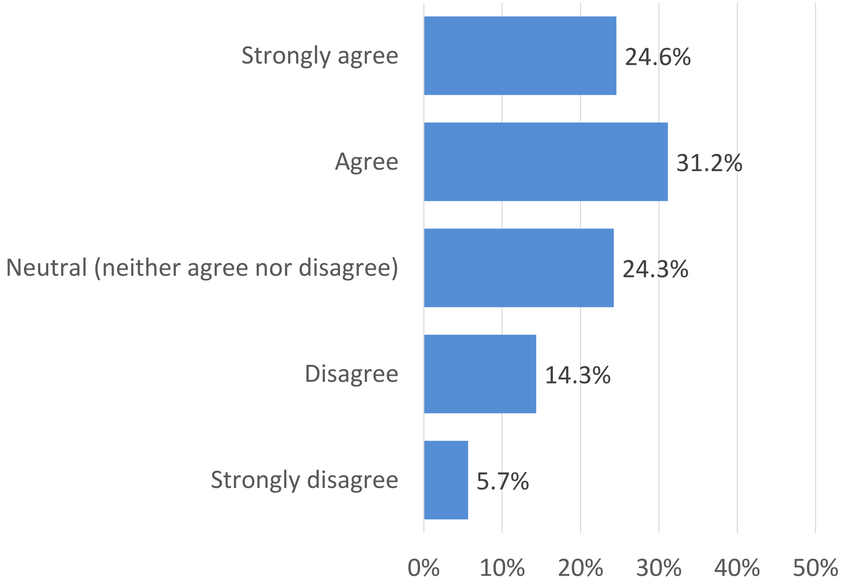




*(Base: All respondents, 1,198, 1,199, 1,195, 1,250, 1,203, 1,231 and 1,365 completed surveys. Data collected April 24-26, May 1-3, 8-10, 29-31, June 5-7, 26-28 and July 3-5, 2020)*

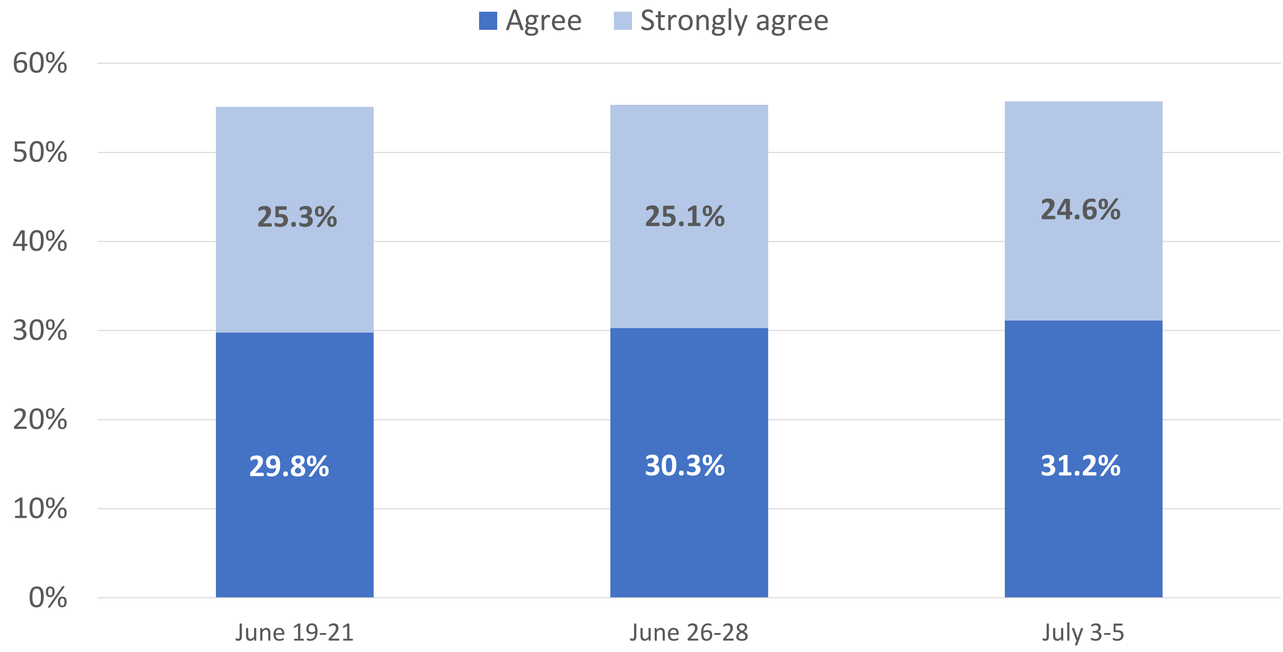
# Community Face Mask Wearing

**How much do you agree with the following statement?**

**Statement: In my community, too many people are not wearing face masks in public.**




**Unchanged from the last two weeks, over half of Americans still feel that too many in their community are not wearing masks in public.** This week, 55.7 percent agree with this sentiment while 20.0 percent disagree.

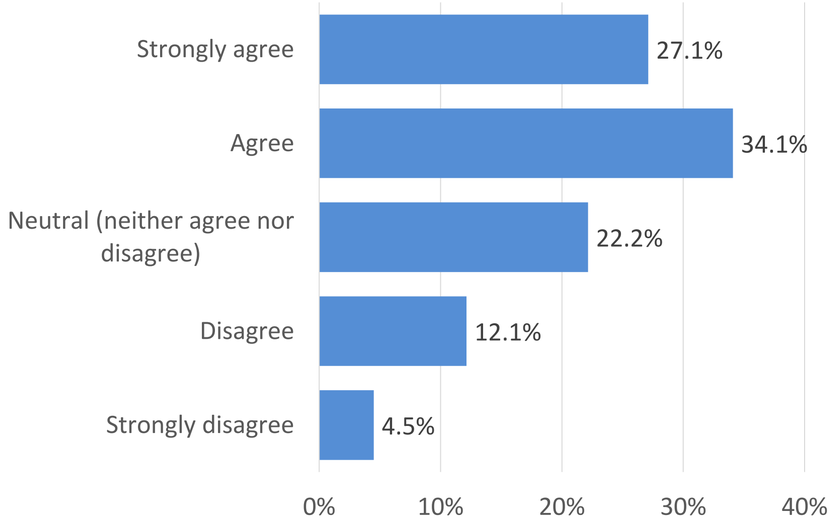



*(Base: All respondents, 1,205, 1,231 and 1,365 completed surveys. Data collected June 19-21, 26-28 and July 3-5, 2020)*

# Community Social Distancing

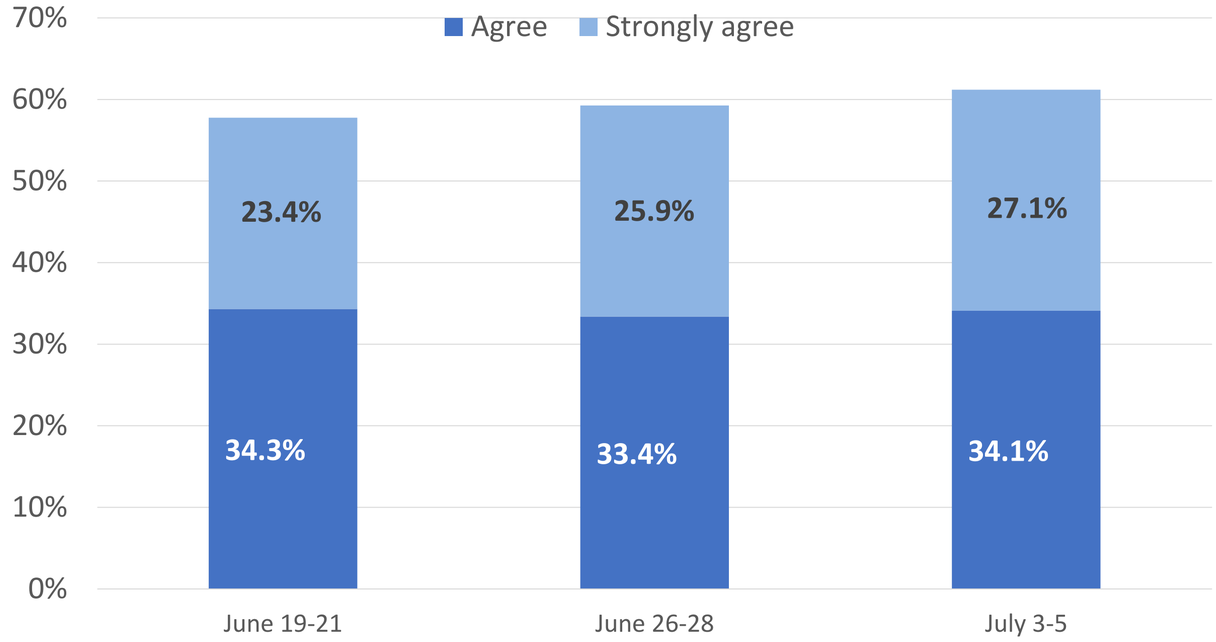
**How much do you agree with the following statement?**

**Statement: In my community, too many people are NOT maintaining appropriate social distancing when in public.**




*(Base: All respondents, 1,205, 1,231 and 1,365 completed surveys. Data collected June 19-21, 26-28 and July 3-5, 2020)*

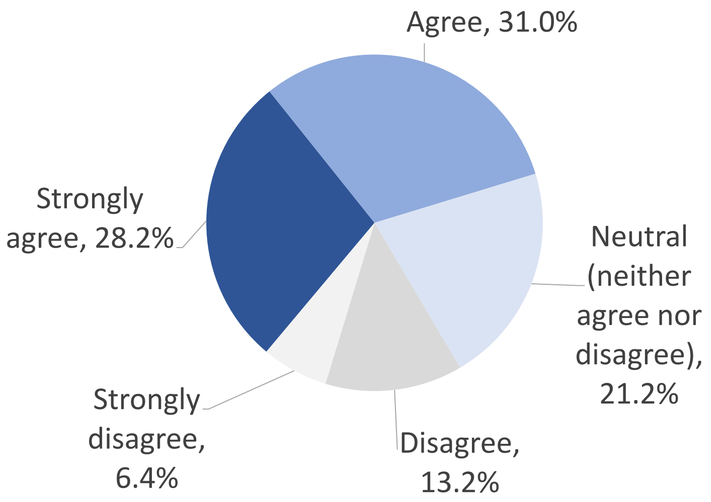
**An even larger proportion of Americans agree that too many people in their community are not maintaining appropriate social distancing while in public (61.2%).**



# Avoiding Travel Until the Crisis Blows Over

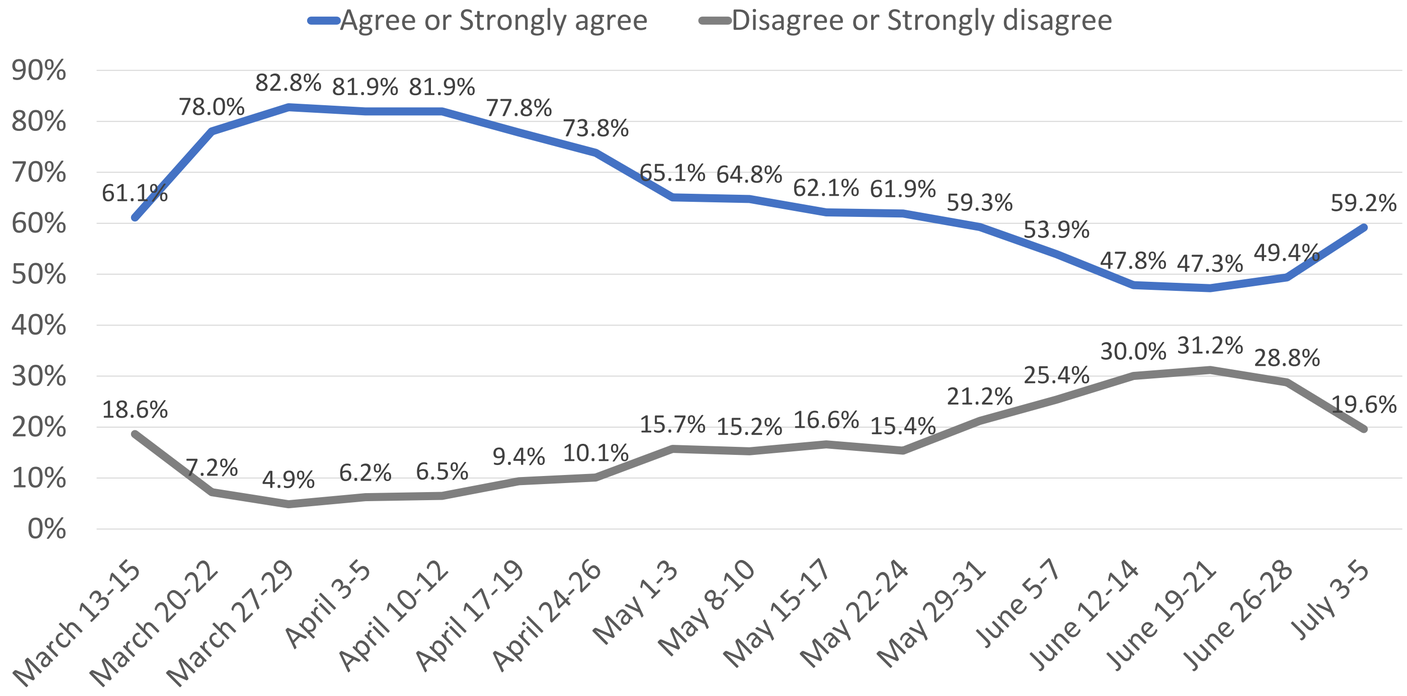
**How much do you agree with the following statement?**

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




*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

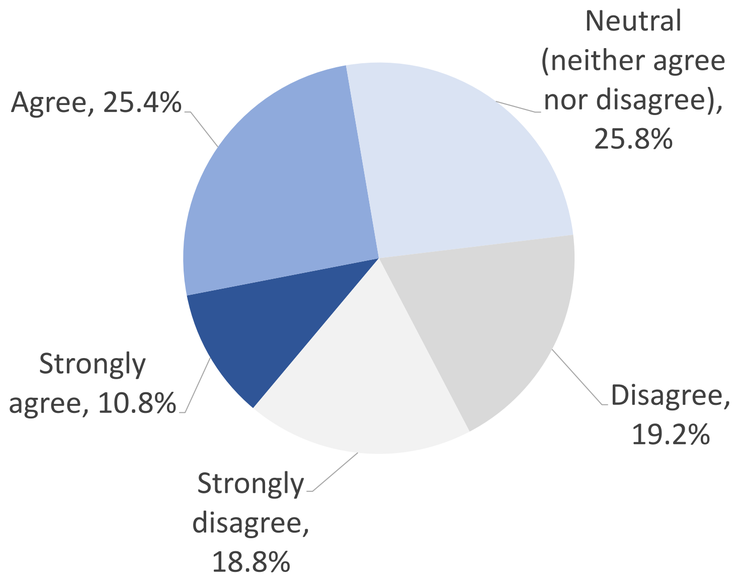
**Up significantly from last week, 59.2 percent of Americans now say they are done traveling until the coronavirus situation blows over.**



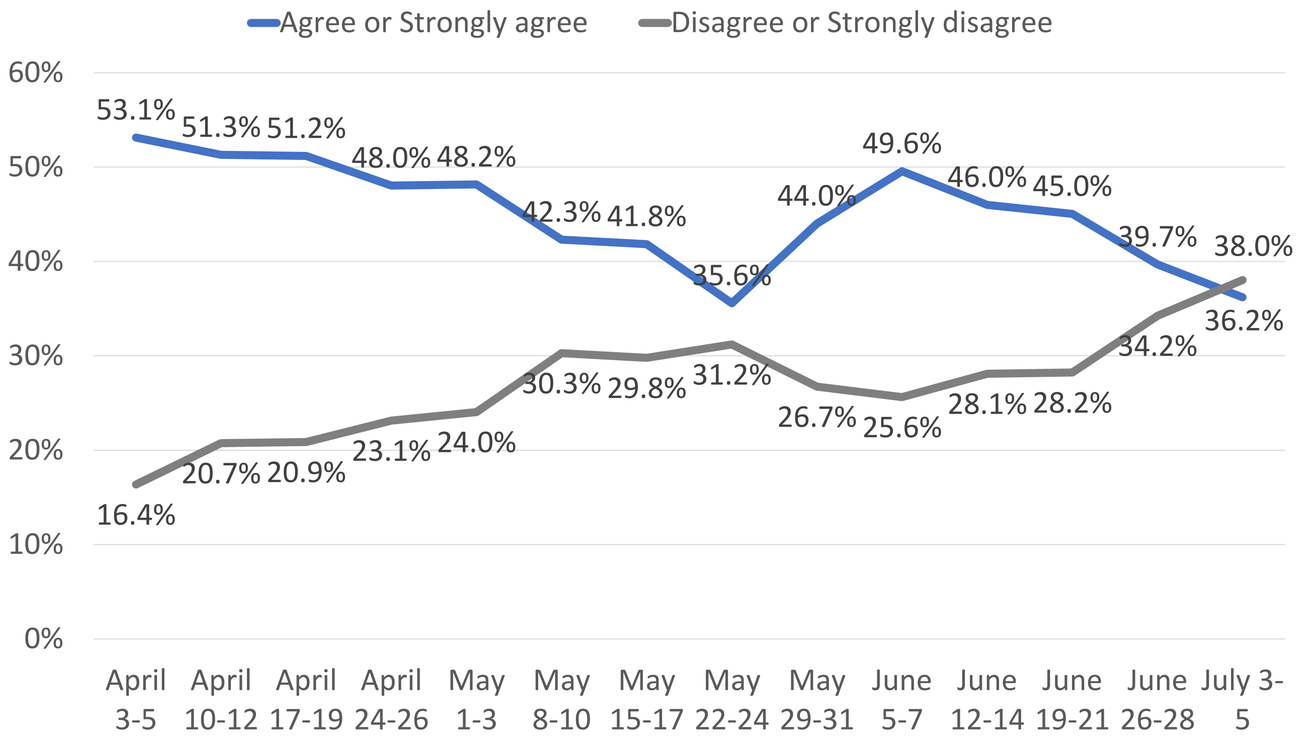
# Expectations for Traveling in the Fall

**How much do you agree with the following statement?**

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




**Americans' optimism for travel to return in the Fall continues to decline.** Now, 36.2 percent expect to be back traveling this Fall (down from 39.7% last week).

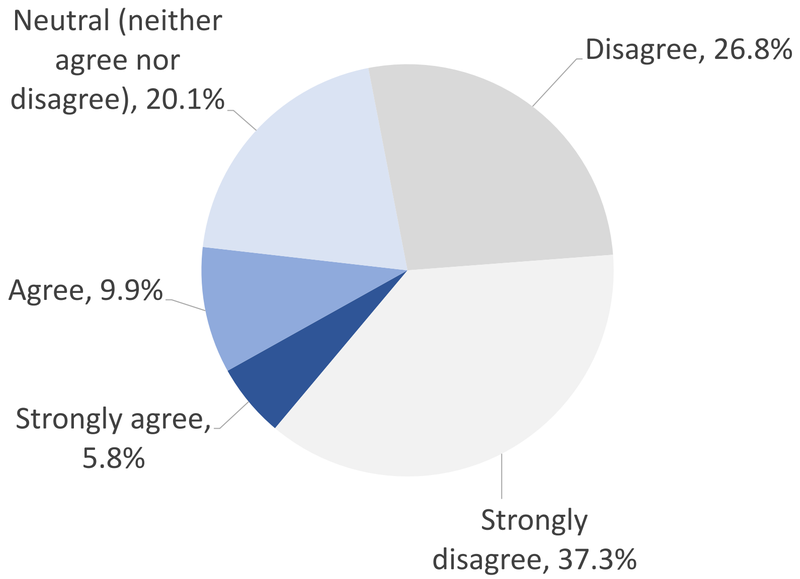



*(Base: All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

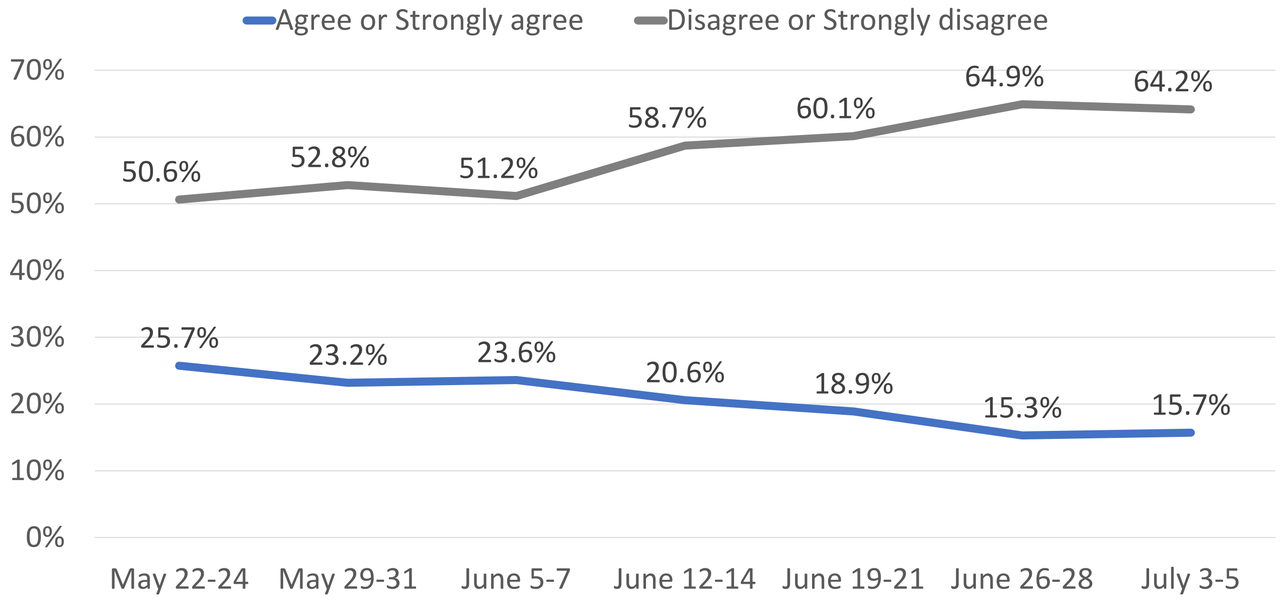
# Expectations for Fall Travel Season

**How much do you agree with the following statement?**

**Statement: I expect the coronavirus situation will be resolved before Fall begins.**




**Expectations that the coronavirus situation will be resolved before Fall remain low.** Now just 15.7 percent agree it will be resolved by then, while two-thirds (64.2%) disagree.

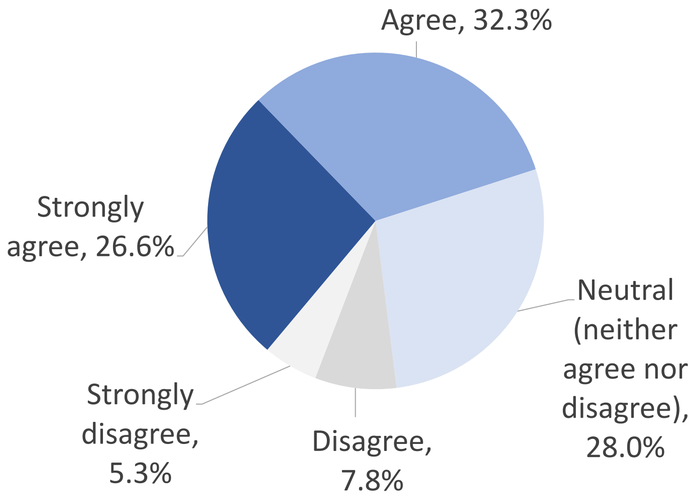



*(Base: All respondents, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected, May 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

# Staycations as a Replacement for Vacations

**How much do you agree with the following statement?**

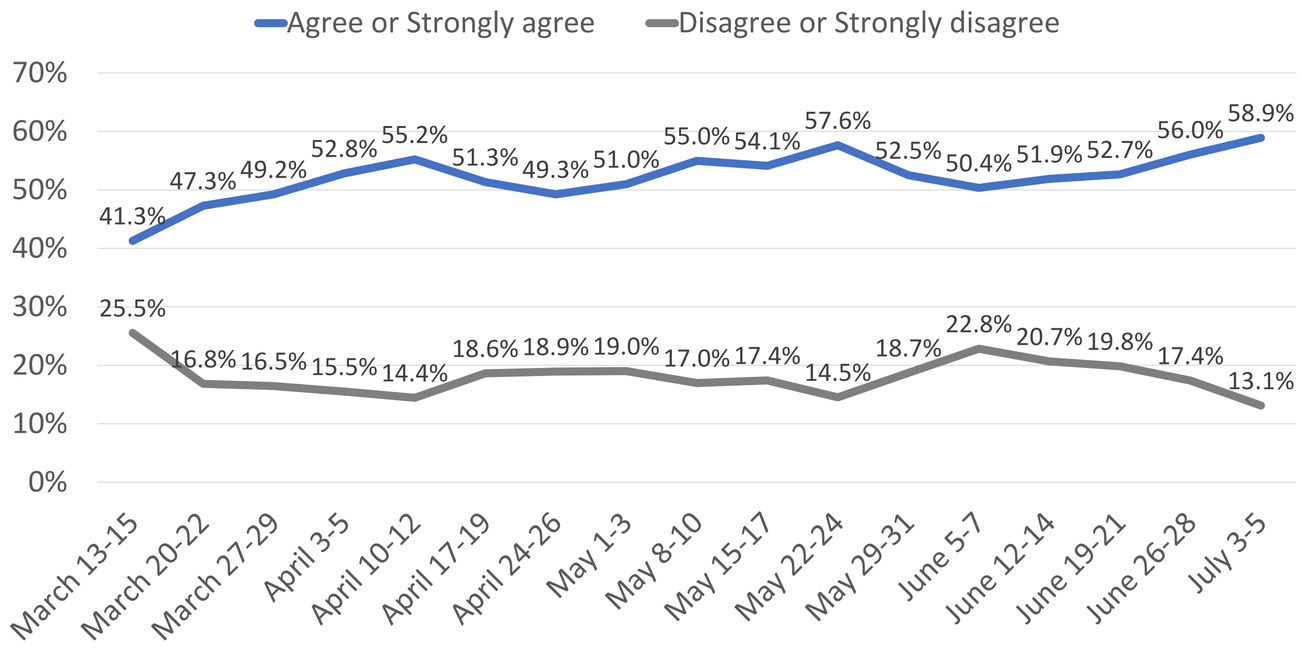
**Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).**




*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

**Staycations replacing vacations this summer increased again this week.**

Now, 58.9 percent of American travelers agree they'll probably take a staycation rather than a vacation this summer (up from 56.0% last week).

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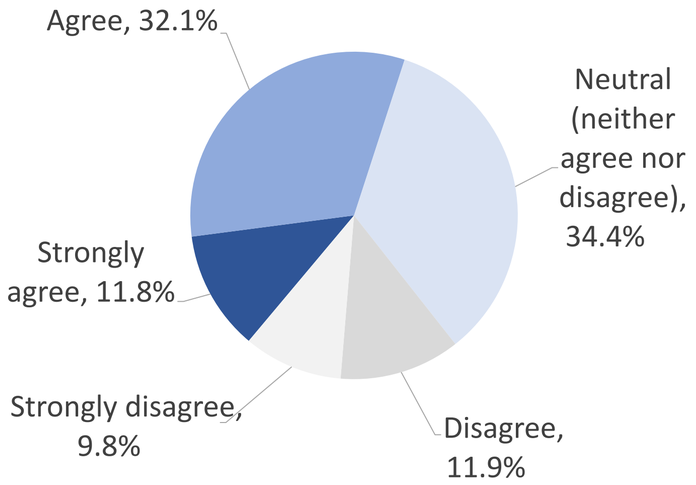
# Replacing Air Travel With Road Trips

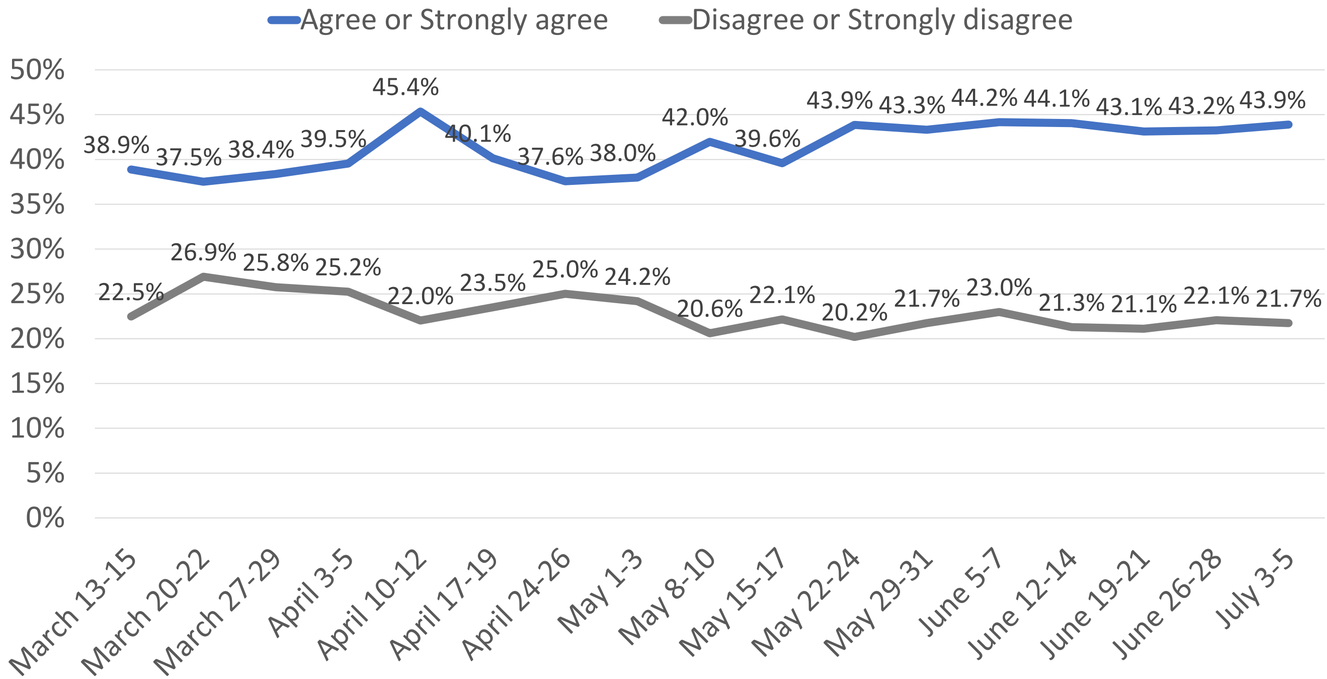
**How much do you agree with the following statement?**

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

**Largely unchanged for the last seven weeks, 43.9 percent of Americans say car travel may displace some of their air travel this year.**

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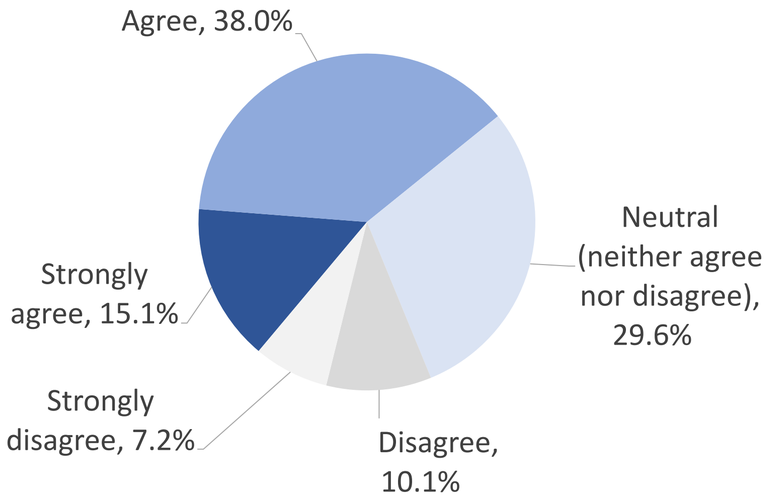
# Replacing Long-Haul Travel with Regional Trips

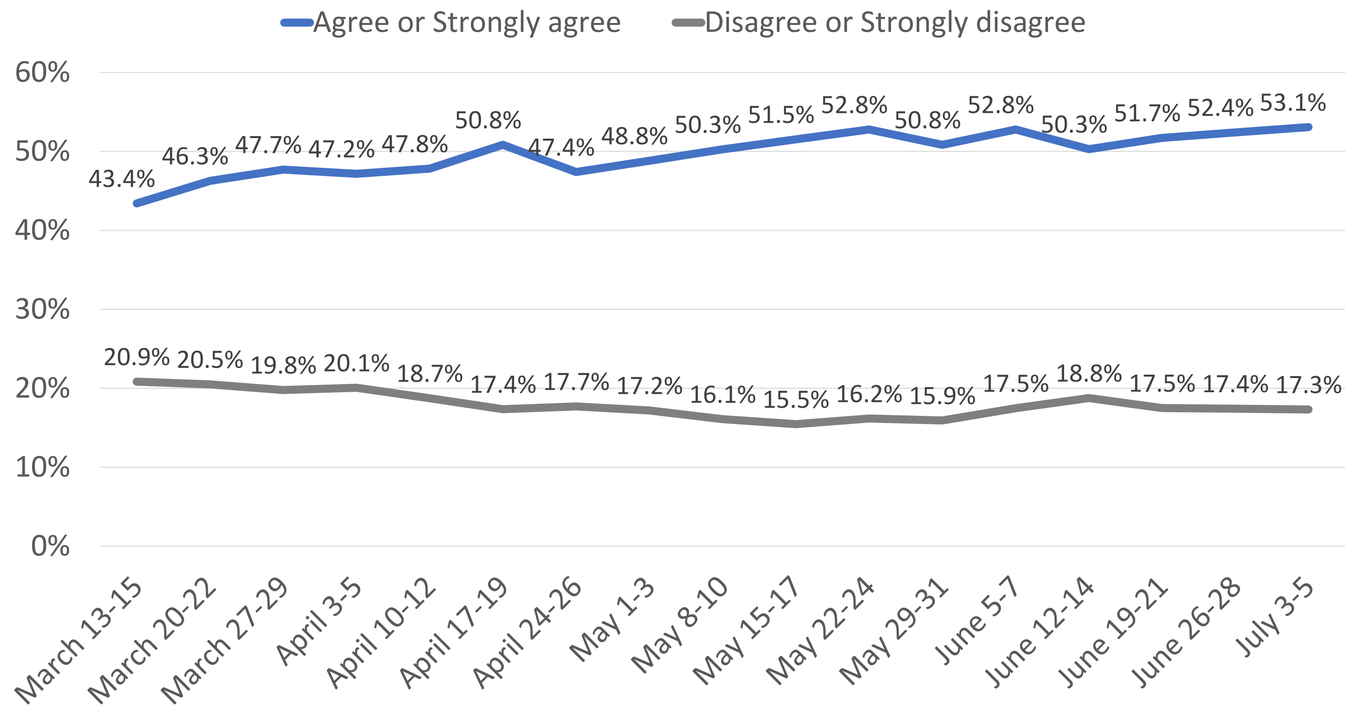
**How much do you agree with the following statement?**

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

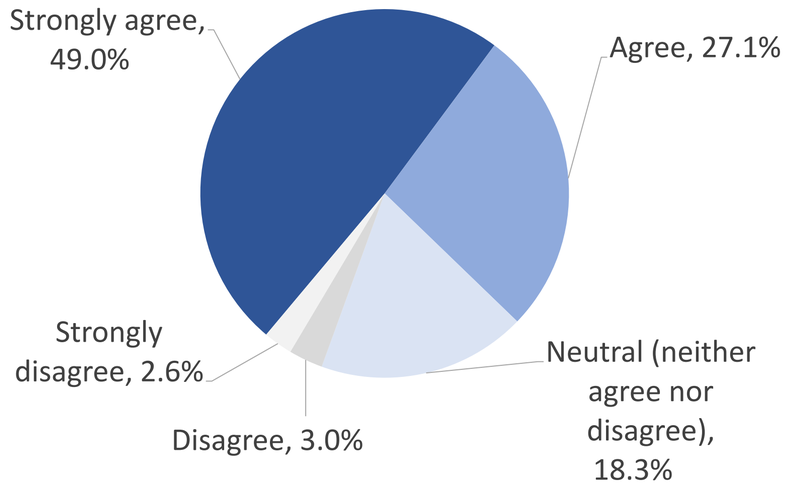
**Half (53.1%) of American travelers still say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus.**



# Avoiding Conventions & Conferences

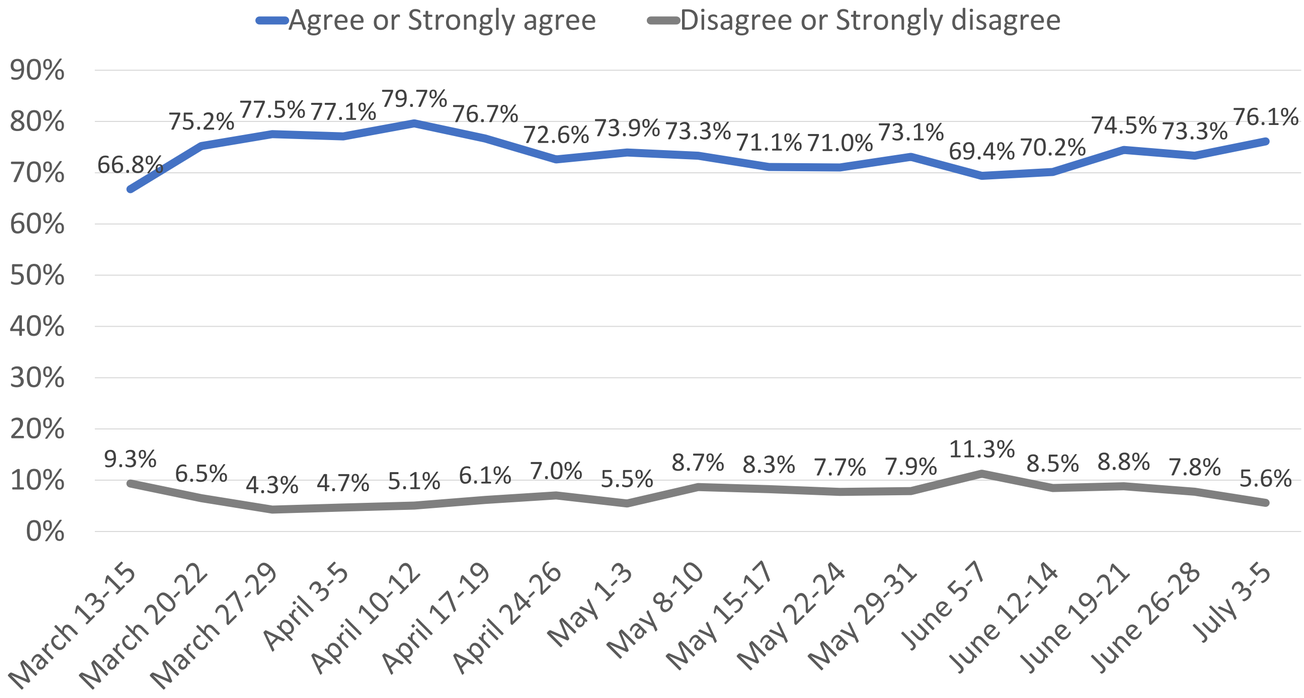
**How much do you agree with the following statement?**

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

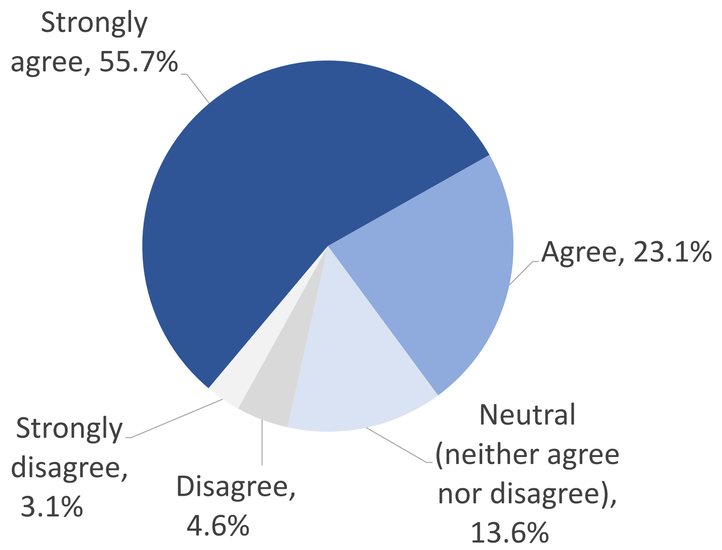
**The likelihood of American travelers attending meetings in the current environment remains low.**



# Avoiding International Travel

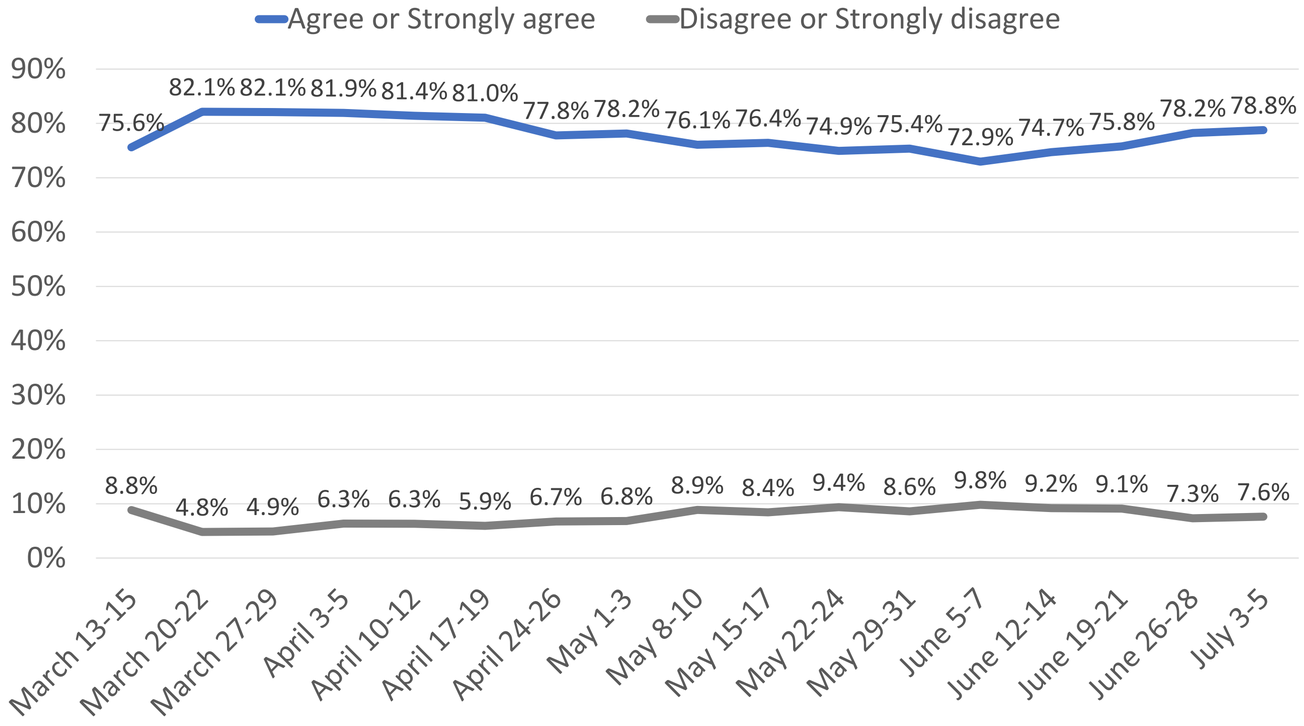
**How much do you agree with the following statement?**

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

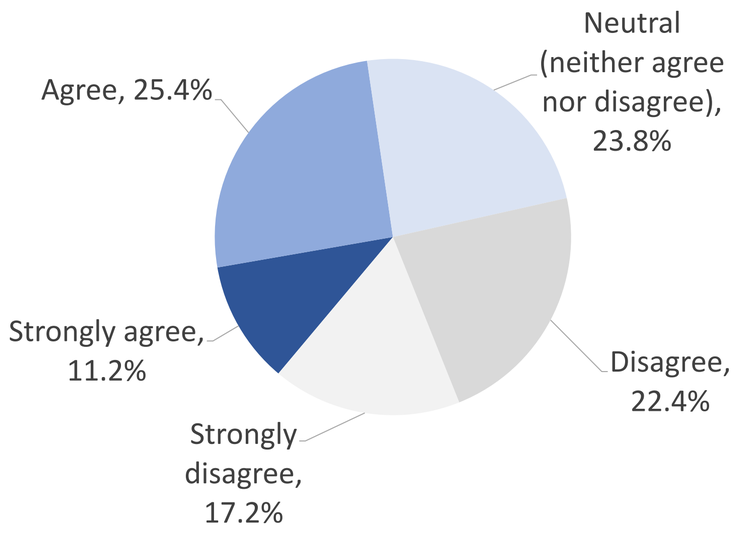
**The likelihood of American travelers traveling abroad in the current environment remains low.**



# Comfort Enjoying Home Community

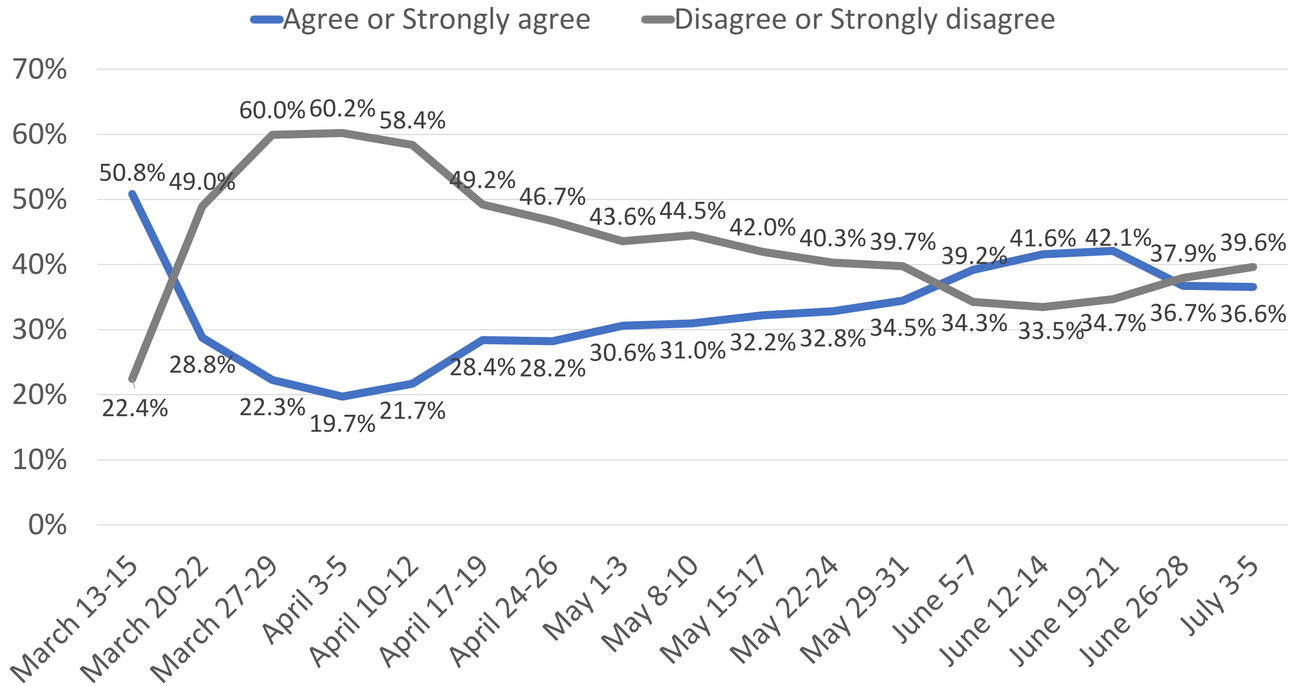
**How much do you agree with the following statement?**

**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, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

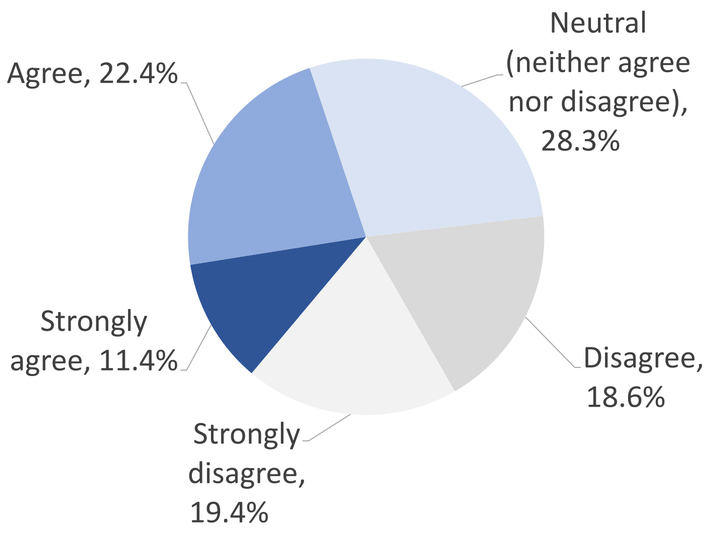
**Americans are reversing course on their comfortability with going out in their own communities.** Now, 36.6 percent say they are comfortable undertaking local activities while 39.6 percent are uncomfortable.



# Discounts and Price Cuts

**How much do you agree with the following statement?**

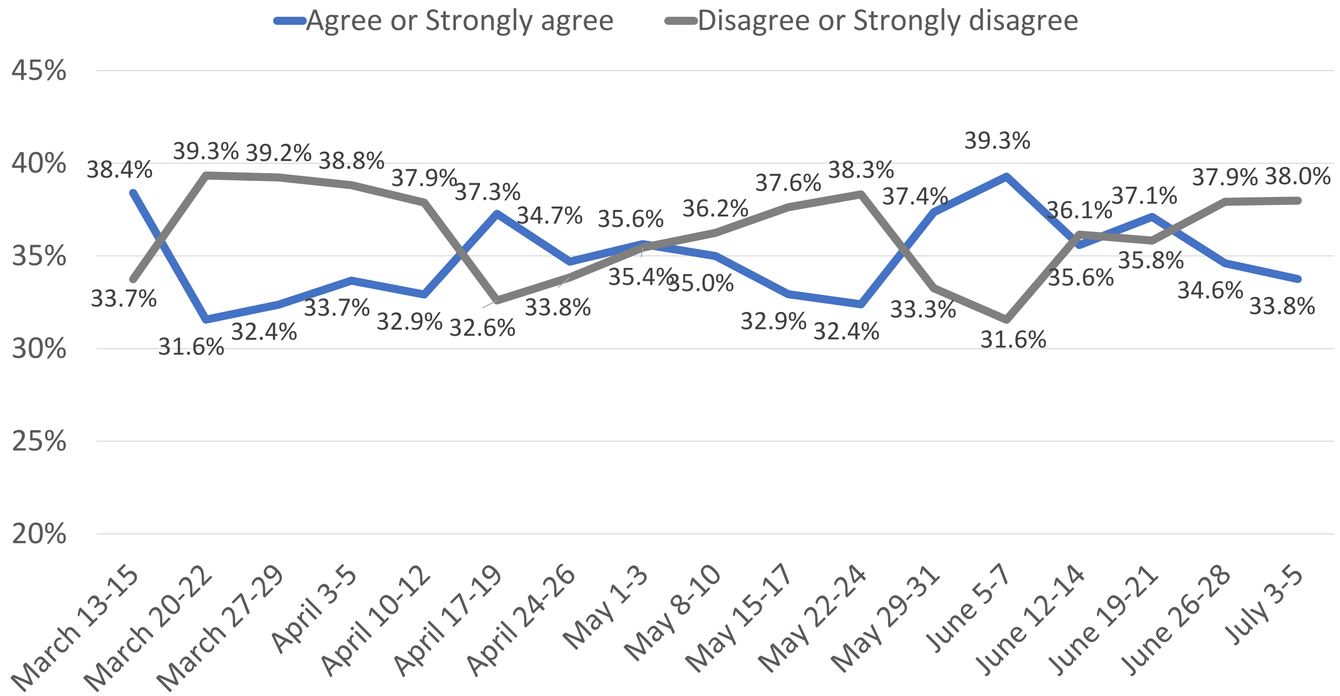
**Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.**




*(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

**In the current environment, price cuts appear to have lost their luster.**

When asked if price cutting made traveling in the next three months more interesting, 33.8 percent now agree (down from a high of 39.3% one month ago).

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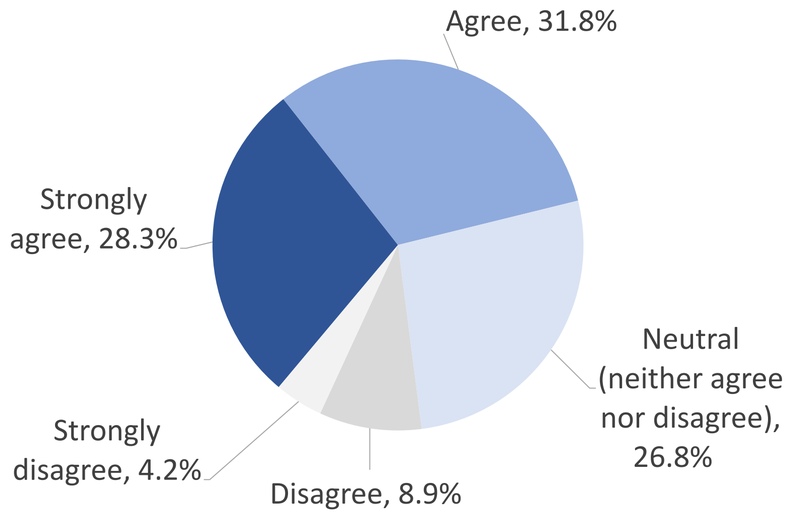
# Travelers in Community are Unwanted

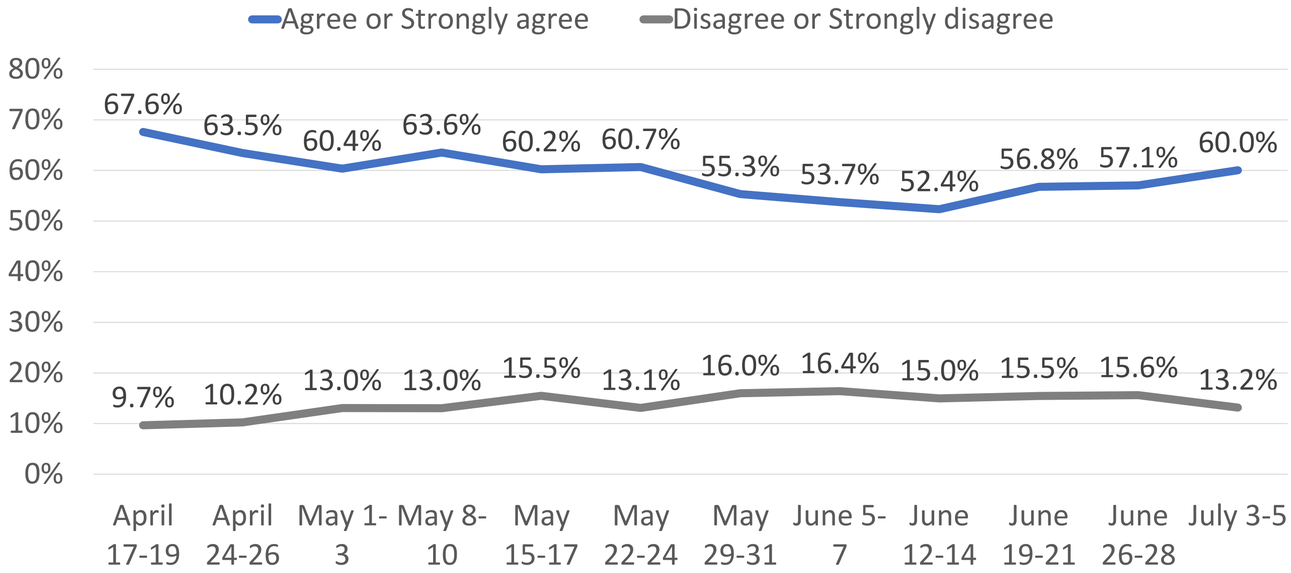
**How much do you agree with the following statement?**

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




*(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

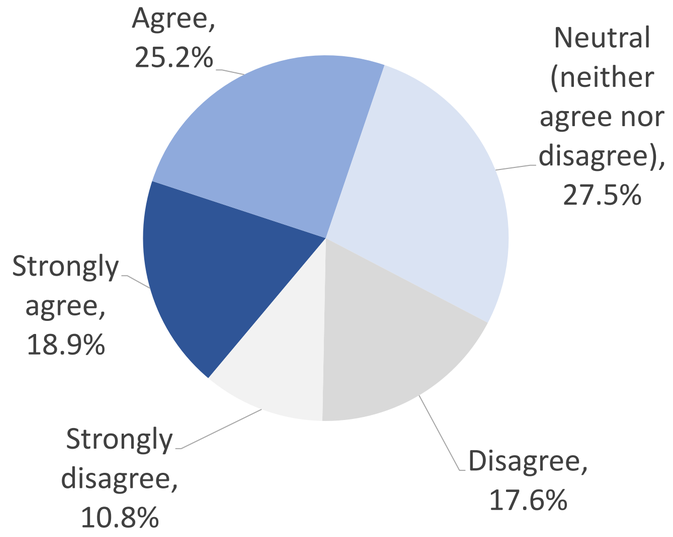
**American travelers still largely do not want other travelers visiting their communities right now.** In total, 60.0 percent agree with this sentiment. Only 13.2 percent disagree.



# Won’t Travel Without Vaccine

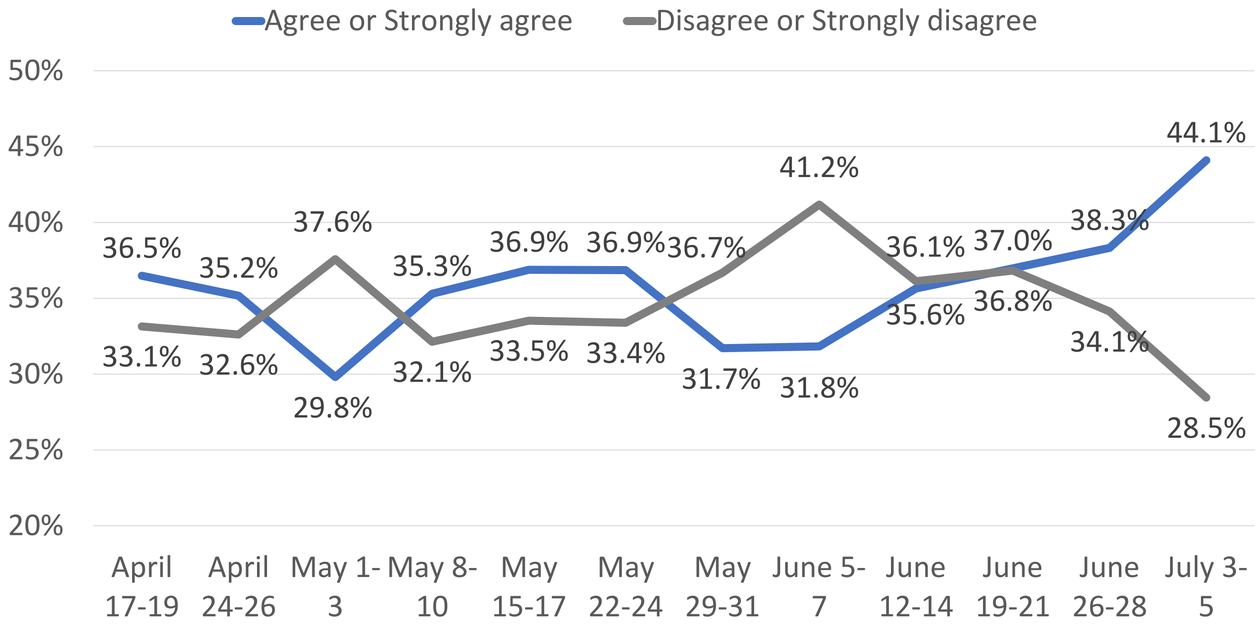
**How much do you agree with the following statement?**

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




*(Base: All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231 and 1,365 completed surveys. Data collected April 17-19 ,24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28 and July 3-5, 2020)*

**At a 12-week high, now 44.1 percent of Americans say they will not travel until a COVID-19 vaccine is available.** 28.5 percent reject this which is also at a 12-week low.



# Coronavirus Travel Sentiment Index

## Measuring the Potential Influence of Travel Marketing

### Highlights from the Week of July 5th

# What is a Predictive Index?

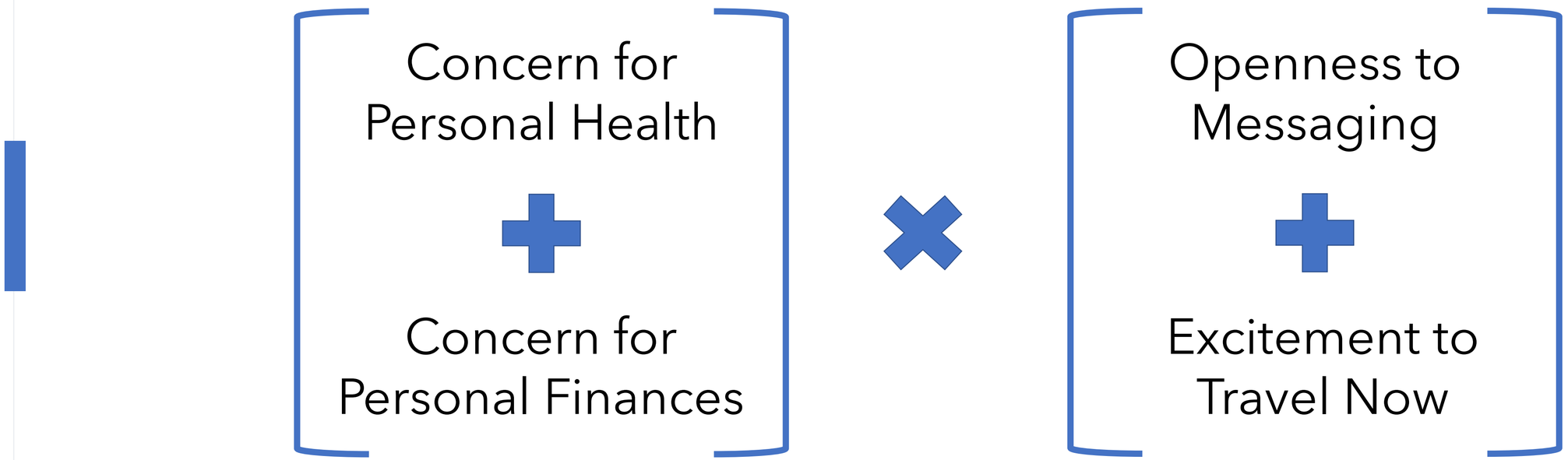
Indexing is the practice of compiling data into one single metric.

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:

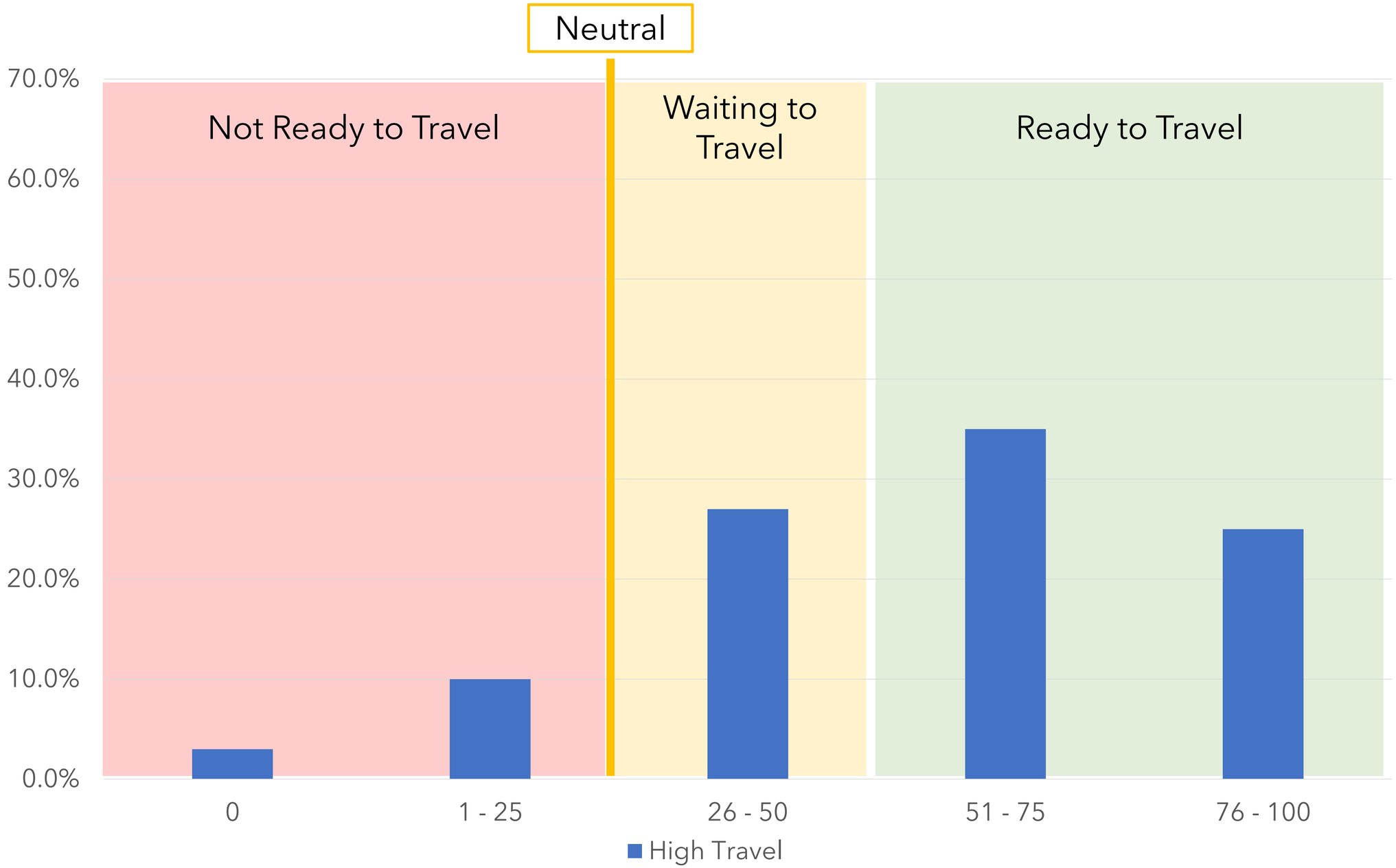
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

# Predictive Index Formula

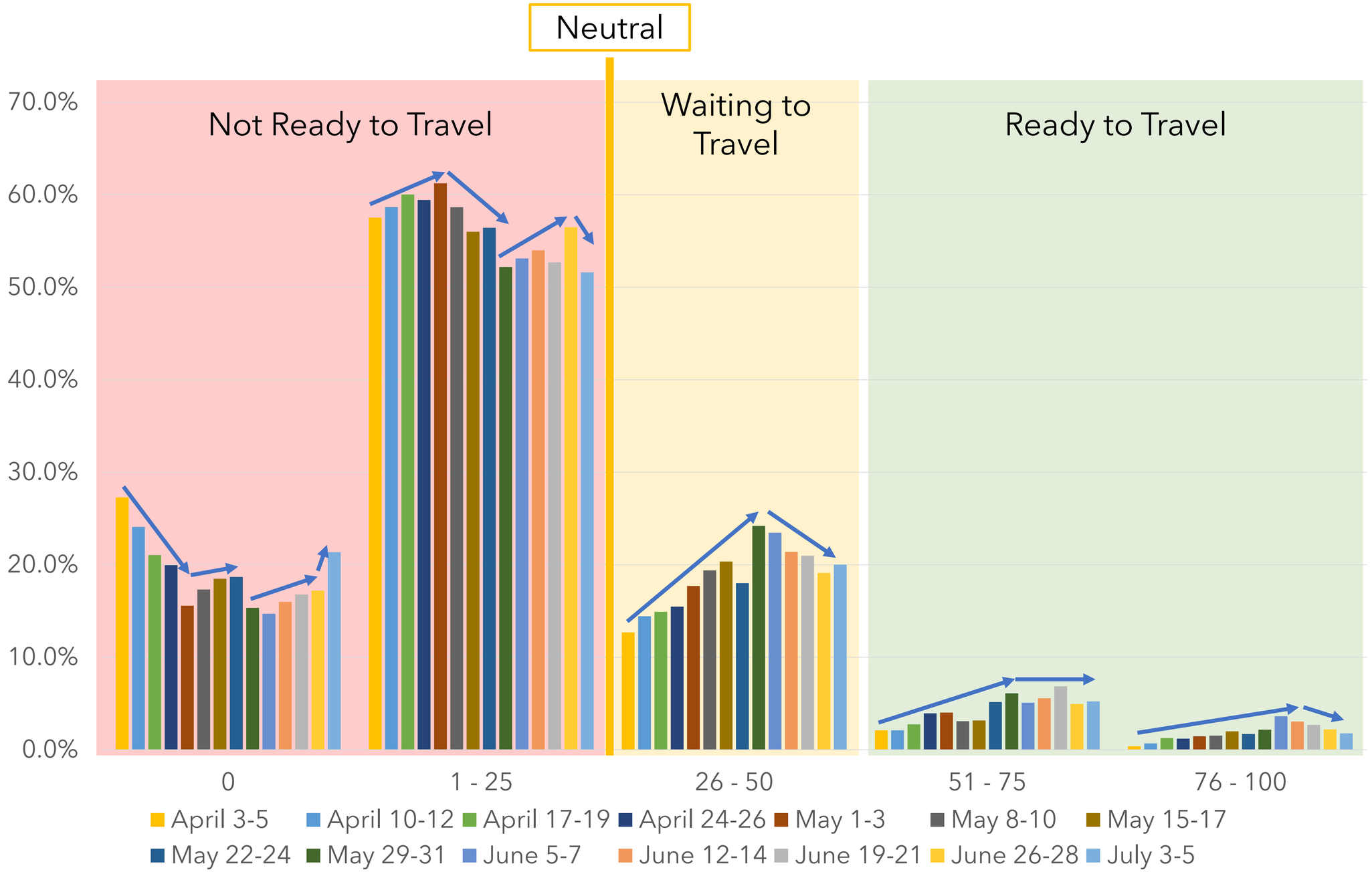


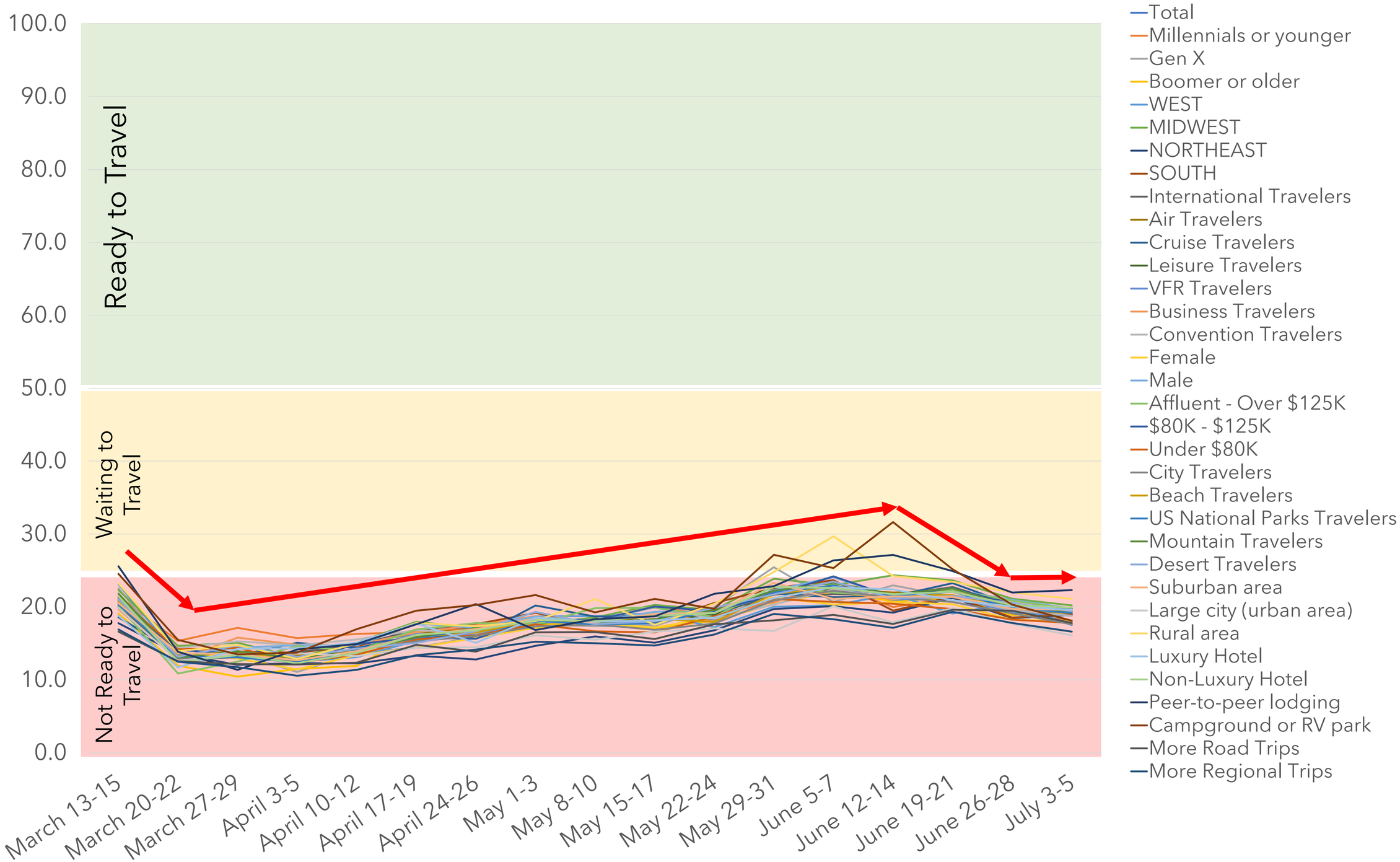

*Normalized to a 100pt scale

# Healthy Travel Outlook



# Travel Outlook

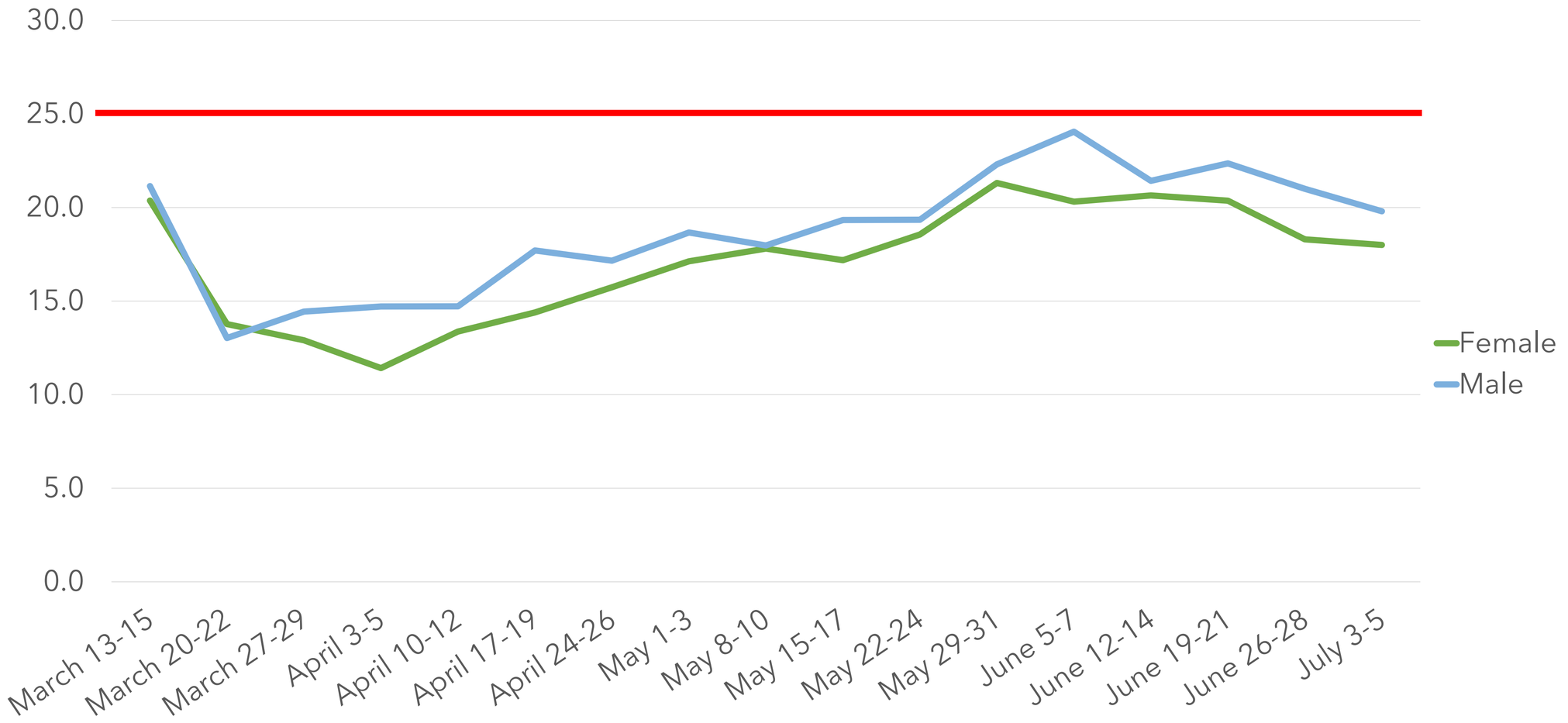



100.0
90.0
80.0
70.0
60.0
50.0
40.0
30.0
20.0
10.0
0.0
Ready to Travel
Waiting to Travel
Not Ready to Travel
March 13-15
March 20-22
March 27-29
April 3-5
April 10-12
April 17-19
April 24-26
May 1-3
May 8-10
May 15-17
May 22-24
May 29-31
June 5-7
June 12-14
June 19-21
June 26-28
July 3-5
Total
Millennials or younger
Gen X
Boomer or older
WEST
MIDWEST
NORTHEAST
SOUTH
International Travelers
Air Travelers
Cruise Travelers
Leisure Travelers
VFR Travelers
Business Travelers
Convention Travelers
Female
Male
Affluent - Over $125K
$80K - $125K
Under $80K
City Travelers
Beach Travelers
US National Parks Travelers
Mountain Travelers
Desert Travelers
Suburban area
Large city (urban area)
Rural area
Luxury Hotel
Non-Luxury Hotel
Peer-to-peer lodging
Campground or RV park
More Road Trips
More Regional Trips

# Gender

Points of Interest:

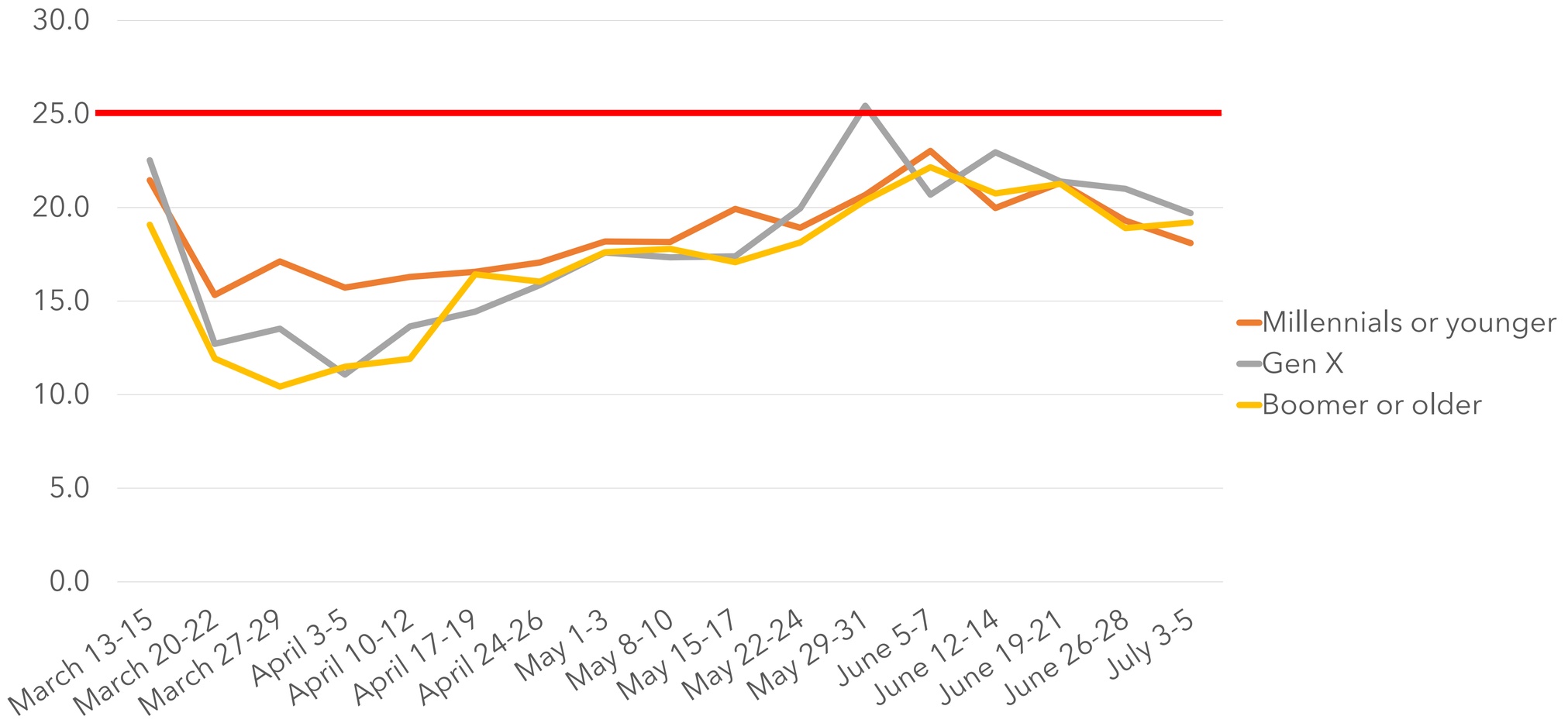
- Safety concerns increased for Men more so than for Women this week.
- This week, 41.2 percent of Women reported they have no plans to travel in 2020 (down slightly from 42.3% last week).
- About a quarter of Men this week (23.4%) said they are already traveling or ready to travel with no hesitations (compared to 17.8% of Women).



# Generation

Points of Interest:

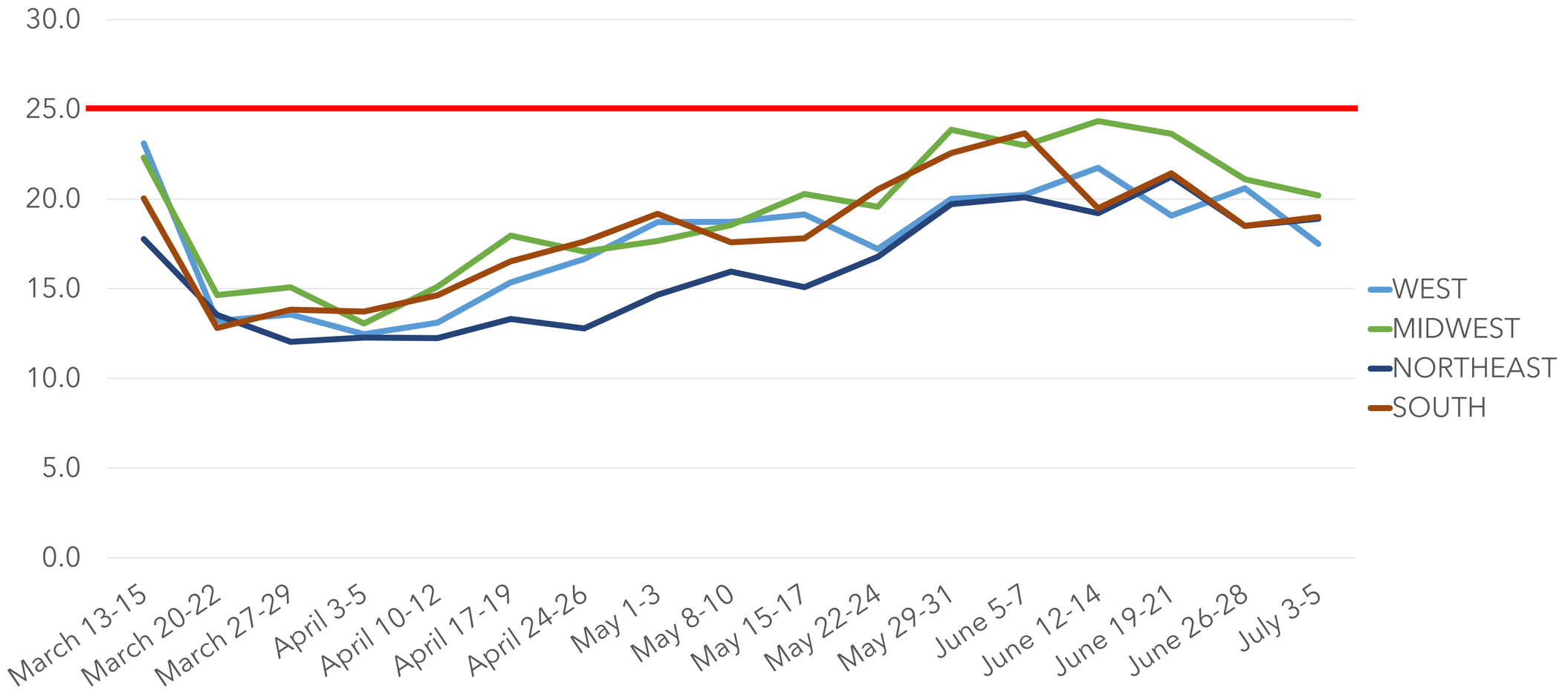
- Millennials indexed lower than the other generations this week, which has happened only once prior to three weeks ago.
- Millennials and Gen X showed slight increases in safety concerns this week.
- About a quarter of Millennials reported having plans to travel during the Fourth of July holiday weekend, while only one-in-ten Boomers said the same.



# US Region

Points of Interest:

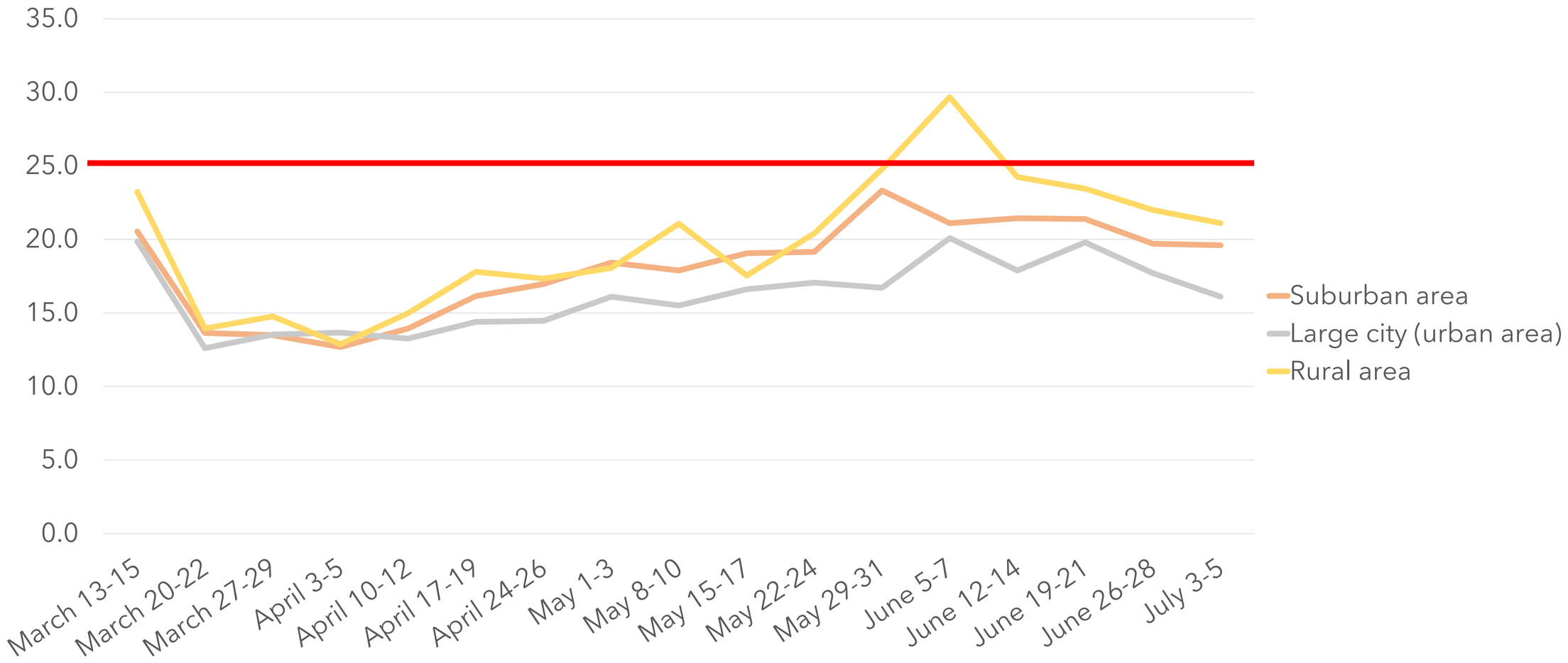
- The Midwest continue to index highest amongst US regions this week.
- The Northeast was the only region this week to report a slight decrease in safety concerns.
- The Midwest and South were the US regions that showed the most excitement for travel and openness for travel messaging.



# Type Of Residence

Points of Interest Impacting Index Scores:

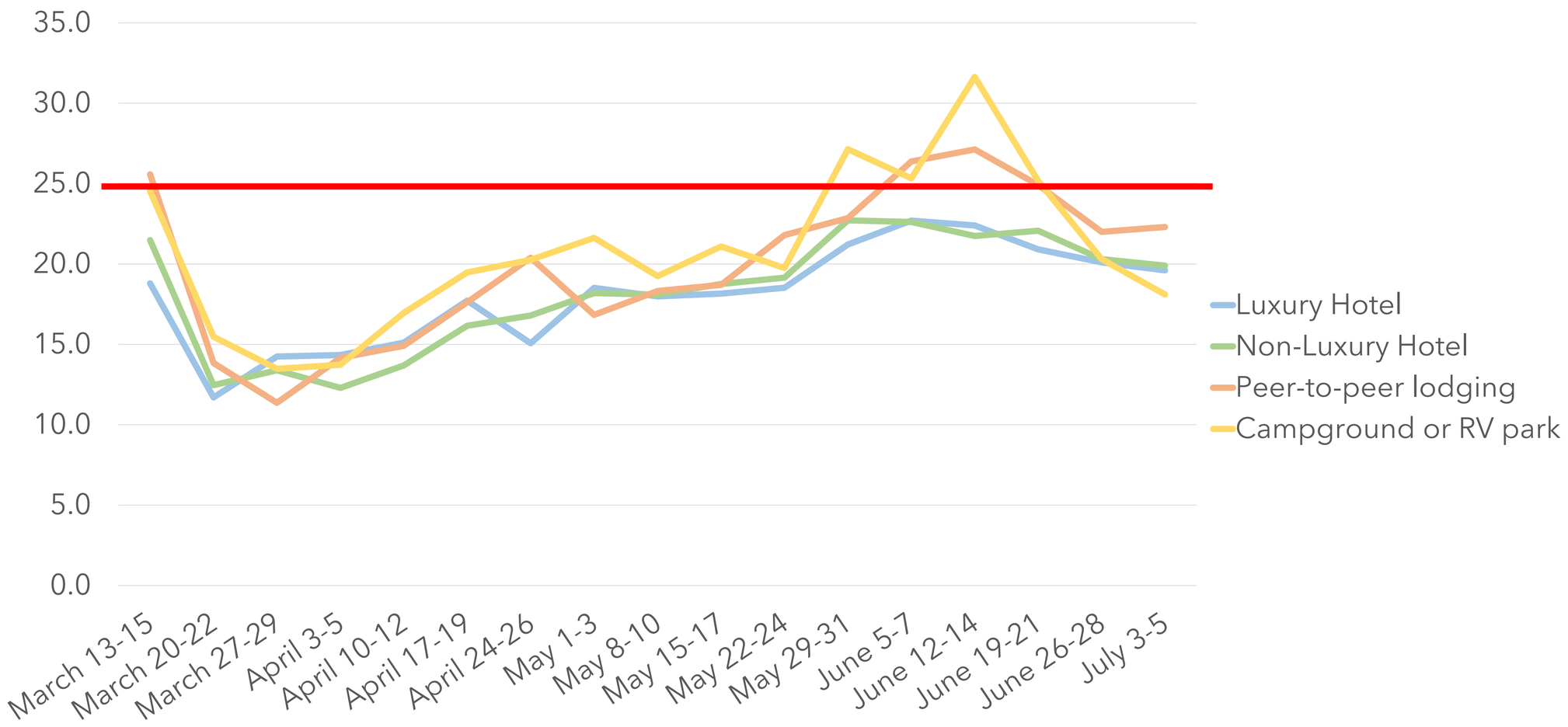
- Rural respondents continue to index higher than their Urban and Suburban counterparts this week.
- Rural and Urban respondents reported the largest relative increases in safety concerns this week.
- Suburban respondents were the most likely to report currently considering visiting a specific destination in the remainder of 2020.



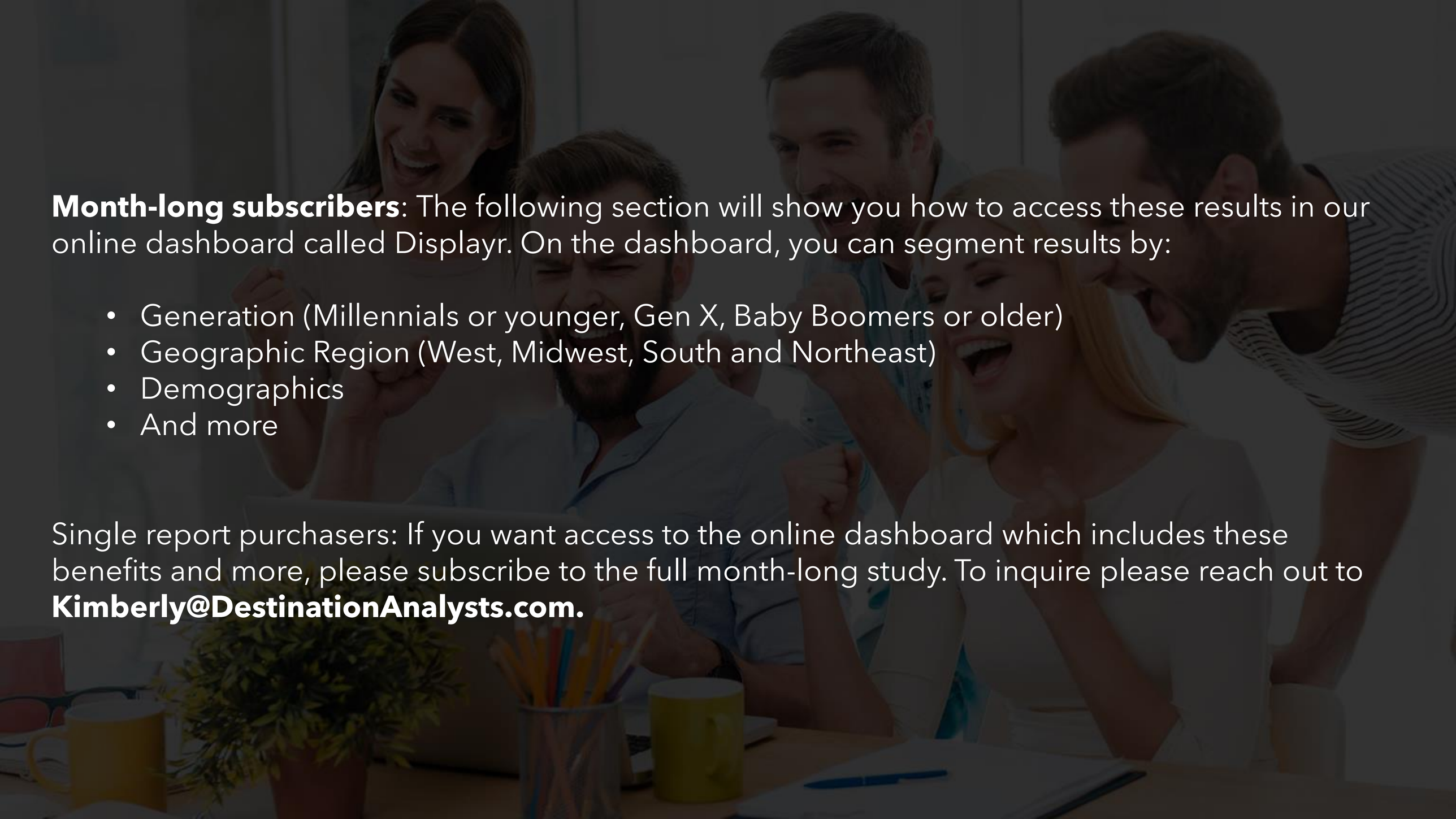
# Lodging Type Used in last 2 years

Points of Interest:

- Peer-to-peer lodging respondents indexed highest amongst lodging types this week.
- Luxury Hotel and Campground respondents were the most likely to say they'd be likely to take a trip they hadn't already considered if a good opportunity presented itself.



# 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

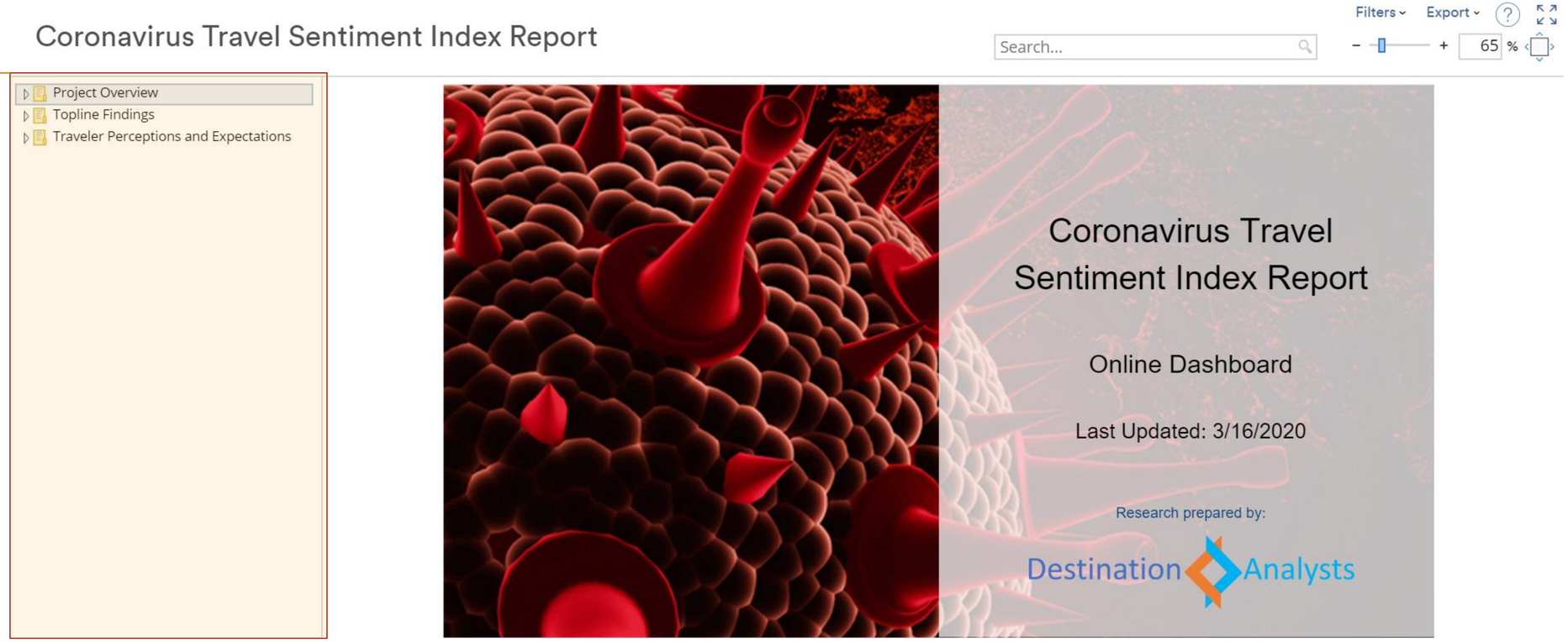
Single report purchasers: If you want access to the online dashboard which includes these benefits and more, please subscribe to the full month-long study. To inquire please reach out to **Kimberly@DestinationAnalysts.com.**

# HOW TO USE DISPLYR

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

# NAVIGATING THE DASHBOARD:

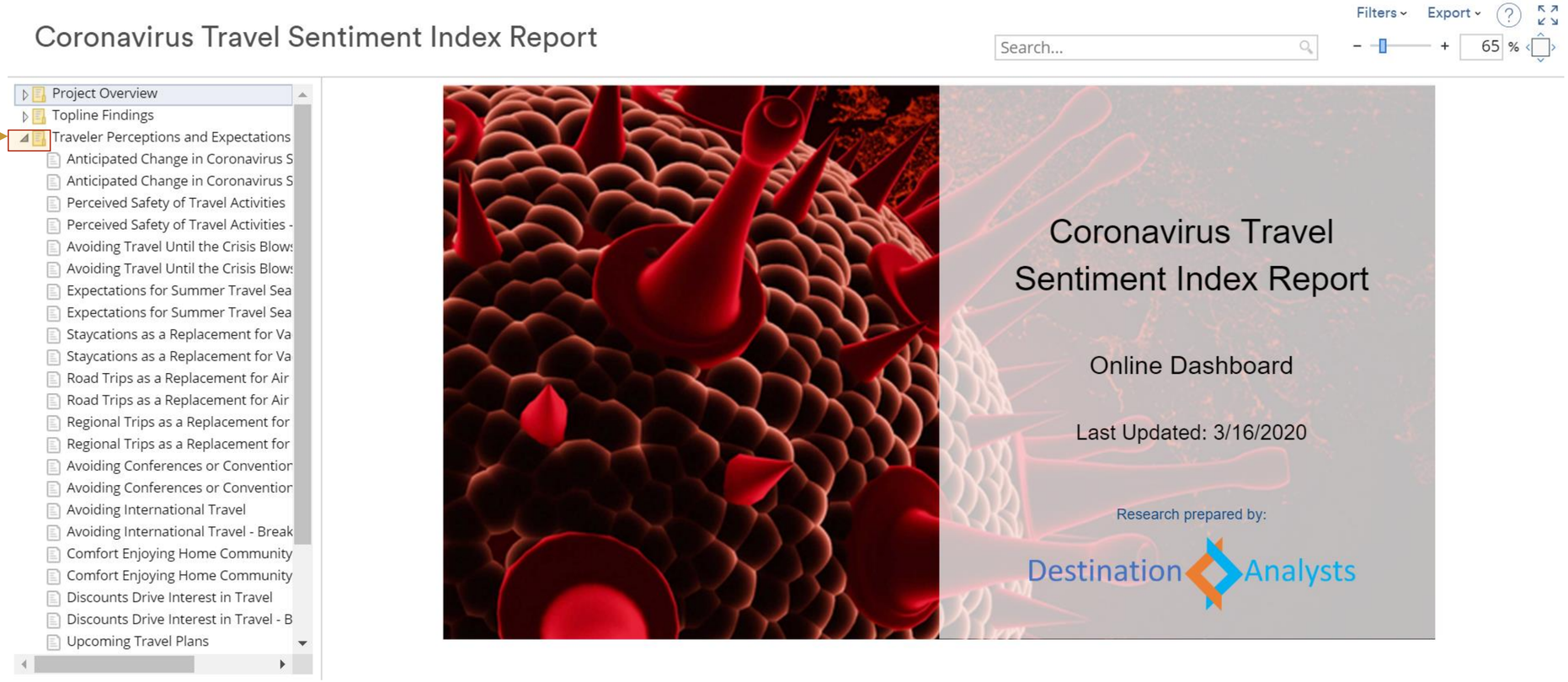
Toggle between the report sections by clicking on the header(s) in this navigation pane



# 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.



# FILTERING THE REPORT:

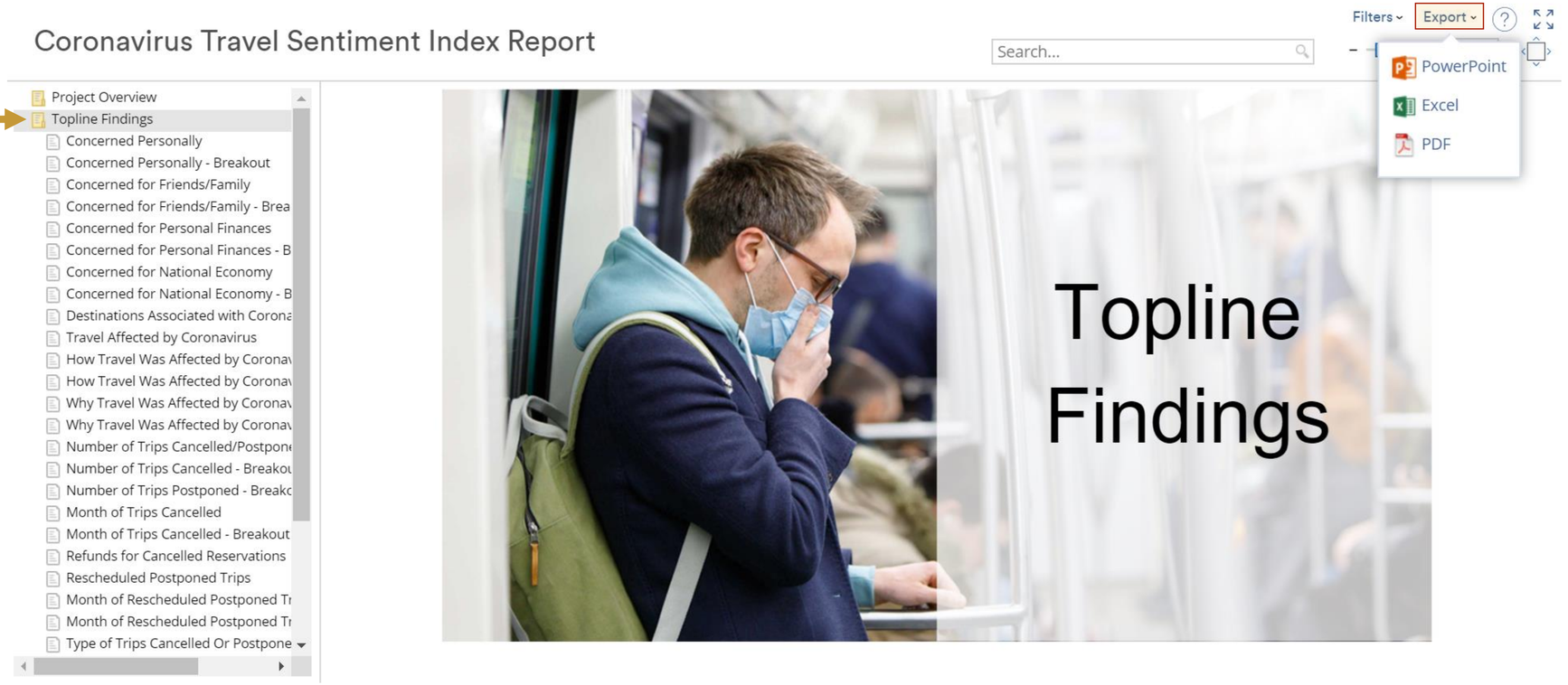
To segment the results by a specific group (generational, geographical, etc.)
Click on “Filters” in the top right corner.

**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”

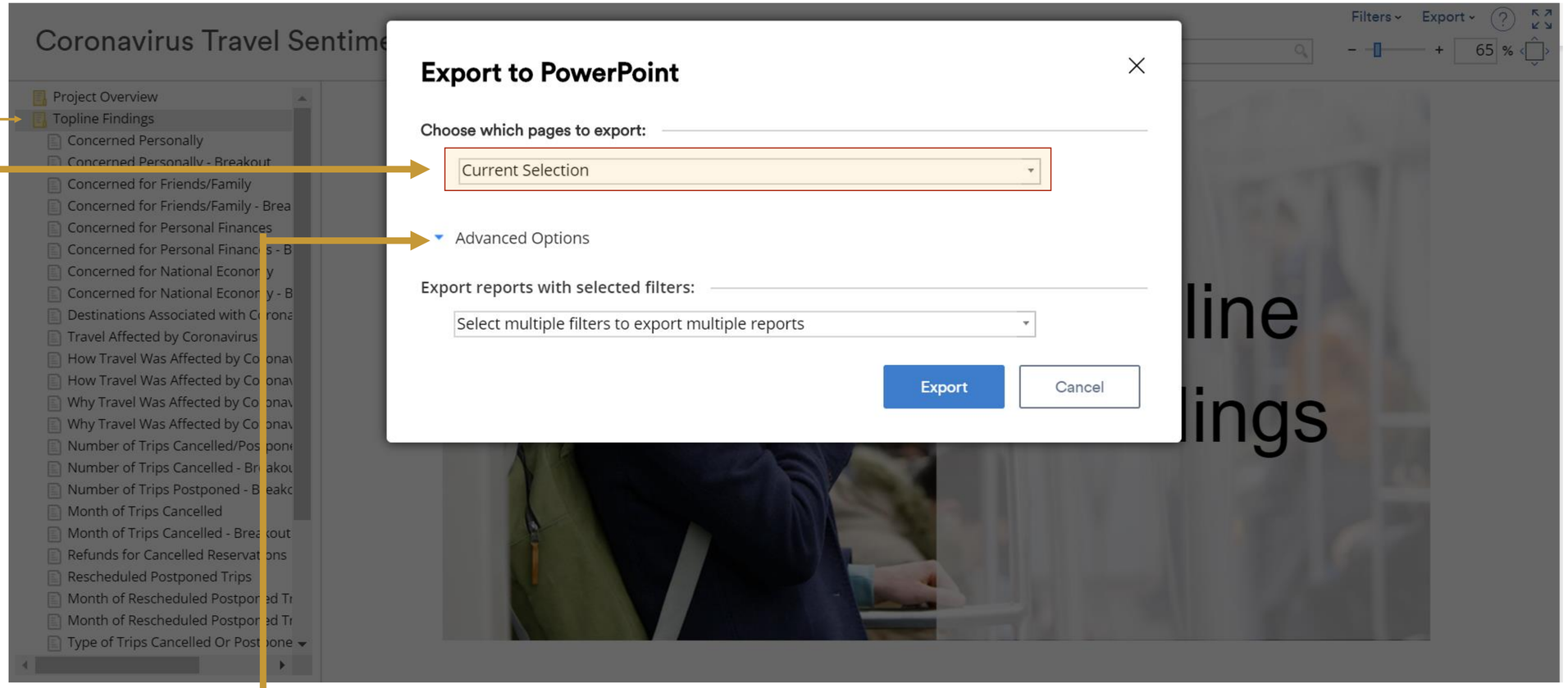


# EXPORTING THE DATA:

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**