

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 6

RESEARCH FINDINGS

April 20, 2020

Destination  Analysts

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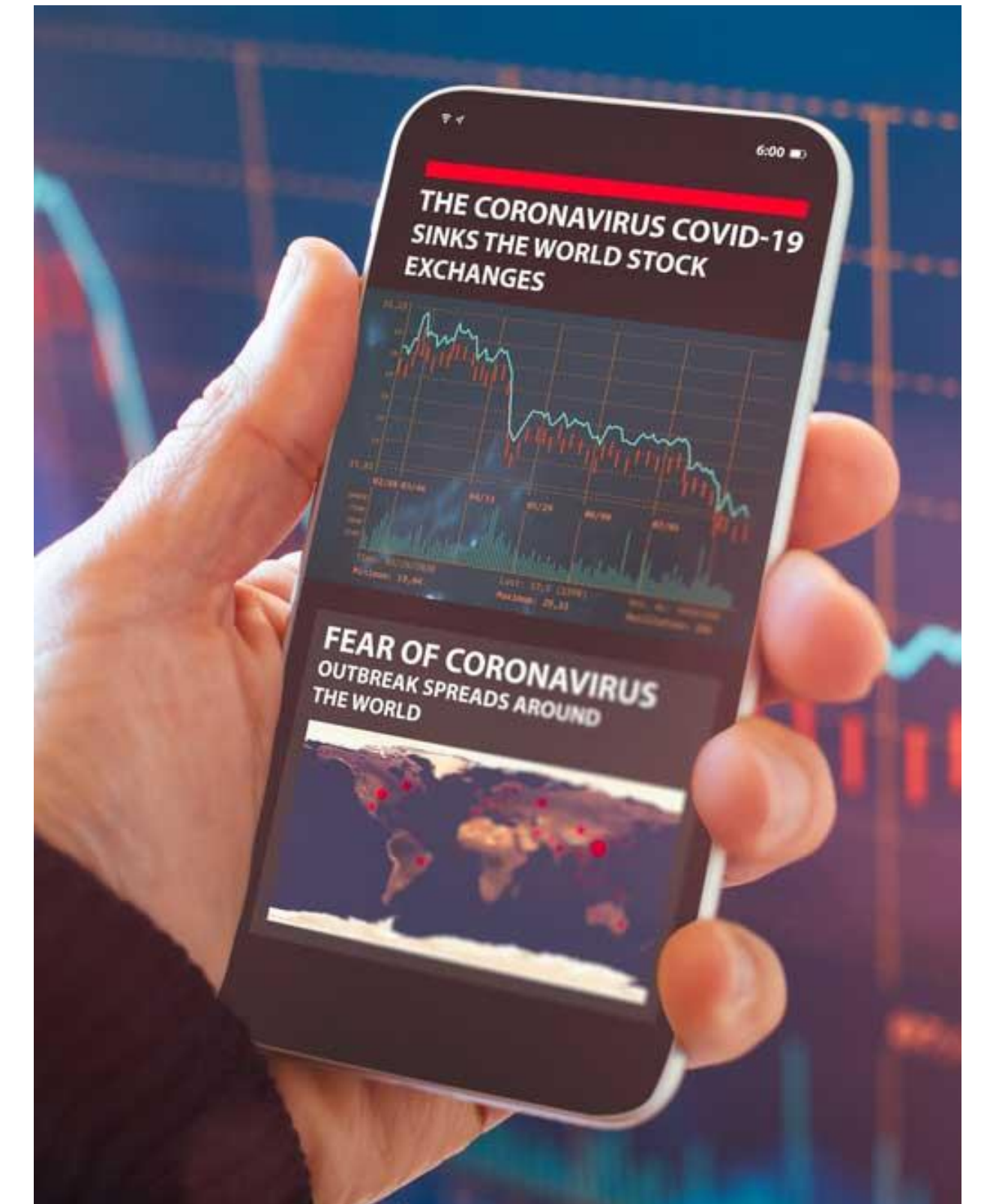
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Project Overview

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 sixth 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 sixth wave of this survey was collected from April 17-19, 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, 1,238 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.



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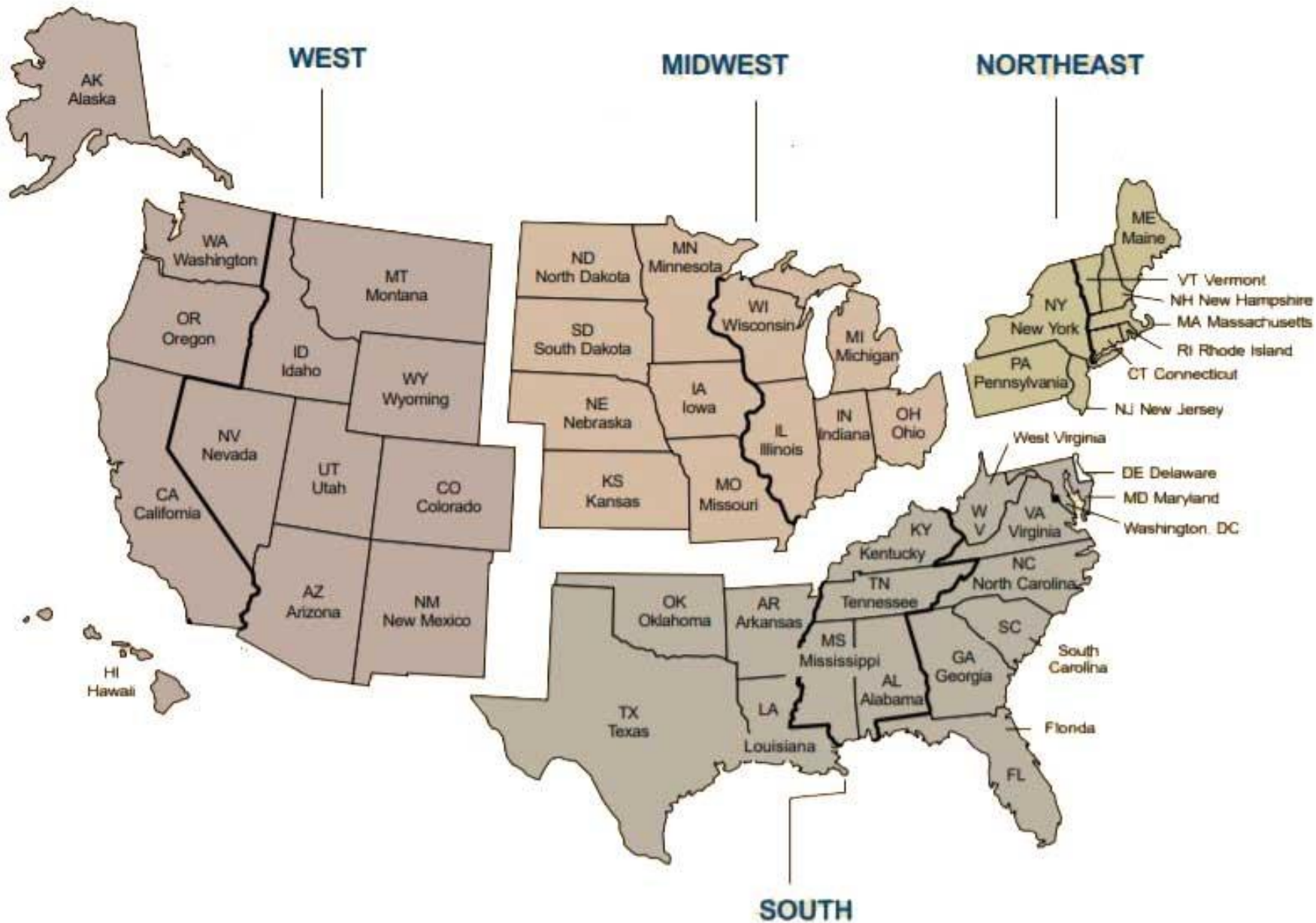
Project Overview

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

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

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

Map of U.S. Showing Survey Regions



Key Findings

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

- **Americans' concern about personally contracting the coronavirus inched downward this week.** In total, 72.9 percent of survey respondents now say they have some level of concern about contracting the virus, nearly the same as 74.0 percent last week. For the second week in a row, concerns about the health of friends and family dropped slightly, with 79.3 percent expressing concern for the safety of their loved ones, down slightly from 81.8 percent last week.
- **Financial worries also decreased very slightly this week.** While still at an extraordinarily high level, concern that the pandemic will impact their personal finances lessened somewhat this week, dropping from 71.9 percent to 67.6 percent. National economic concerns remain high. Nearly 90 percent of travelers expressed some level of concern for the national economy.



Key Findings



- **A wide range of travel activities are also mostly perceived as being dangerous.** Cruises continue to be seen as the least safe travel activity. 83.7 percent of American travelers say that traveling on a cruise is either “Somewhat unsafe” or “Very unsafe.” Over the last several weeks, the perceived safety of various travel activities had stabilized, and this week improved. In the sixth wave, the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe” decreased, in some cases significantly.
- **Signs of optimism appeared this week.** In a major change this week, fewer travelers feel the situation will get worse in the next month. This week, only 37.4 percent expect the coronavirus situation to get worse in the next month, down sharply from 48.5 percent last week. Traveler excitement to get back out on the road stayed constant this week, as 70.2 percent of American travelers agree that they miss traveling and can’t wait to get out and travel again.
- **In the sixth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus increased to 75.3 percent.** Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with two-thirds of respondents citing it as a reason (62.5%). A little over one-third of American travelers say they expect to change the types of travel destinations they choose to visit after the coronavirus situation blows over.

Key Findings

- **Cancellations.** Over the last six weeks, the proportion of American travelers cancelling trips due to the coronavirus has grown from 55.1 percent to 70.3 percent. The average American traveler who has cancelled a trip says they have done so for 1.9 trips as a result of the outbreak. Similarly, the typical traveler has postponed 1.9 trips due to the crisis. A majority of travel cancellations appear to be near-term bookings. In this survey wave, there are continued increases in the cancellation of May, June and July trips. The proportion of travelers being fully refunded for cancelled trips continues to climb slowly. This week, 68.0 percent report receiving full refunds, compared to 66.0 percent last week. Over the course of the month, we have seen a decrease in the proportion of travelers cancelling weekend getaways and trips to visit friends and family. Again, in this wave there were no major changes in the types of destinations being cancelled.
- **Postponements** are appearing to be spread across the summer months. Increasing numbers of trips are being postponed until June and July. Approximately 7-in-10 American travelers who have postponed a trip due to the pandemic have not yet rescheduled it. Vacations are still the most postponed trip type. Urban areas are still the most postponed destination type. Almost one-third (31.1%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure has remained stable over the past five survey waves.



Key Findings



- **While nearly 8-in-10 American travelers say they are done traveling until the coronavirus situation blows over, this sentiment has decreased for the first time in six weeks.** Last week more than half (52.2%) strongly agreed with this sentiment, which has dropped this week to 44.0 percent.
- **Now more travelers disagree the coronavirus situation will be resolved by the summer travel season.** In total, 44.5 percent of Americans disagree that the coronavirus situation will be resolved before summer. In contrast, 29.8 percent agree. About one-half of American travelers (51.2%) expect to be back traveling this Fall. This sentiment is unchanged from last week (51.3%).
- **Staycations.** While half of American travelers agree that staycations may end up replacing vacations this summer, this sentiment has decreased for the first time in six weeks. The percent of American travelers agreeing with this sentiment has decreased slightly from 55.2 percent last week to 51.3 percent in the most recent wave. When thinking of taking a staycation this summer, half of American travelers consider it to be “staying mostly at home” (49.7%). Meanwhile, one-in-five define this as “spending time devoted to enjoying the broader region in which they live” (19.8%). The top staycation activity American travelers will most likely engage in this summer will be taking time off work. Nearly a third also say they are likely to take day trips to area attractions (32.6%) and/or take road trips that are 50-miles or more away from their home (30.7%).

Key Findings

- **Regional road trips may be popular as the year moves forward.** Car travel may still displace some air travel this year, with 40.1 percent of American travelers saying they may avoid airlines and instead travel by car. This decreased from 45.4 percent last week. While the sentiment about replacing air travel with road travel has decreased slightly, agreement about taking more regional trips due to the coronavirus has increased. This week 50.8 percent said they'll probably take more regional trips while avoiding long-haul trips (up from 47.8% last week).
- **Trust that attending meetings in the current environment remains low.** Three-quarters of travelers (76.7%) say they will be unlikely to attend these events until the coronavirus situation is over. However, strong agreement with this sentiment has declined slightly this week.
- **Unchanged in the last five weeks, 4-in-5 American travelers (81.0%) said they're unlikely to travel outside the U.S. until the coronavirus situation is resolved.**
- **Price cuts now resonate with over 1-in-3 American travelers.** When asked if price cutting made traveling in the next three months more interesting, 37.3 percent now agree, up notably from last week (32.9%).



Key Findings



- **American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves.** However, this week it appears that Americans are starting to feel more comfortable about going out in their communities (28.4%—up from 21.7% last week). In total, 63.5 percent of American travelers now say they have been taking action to try to support local businesses where they live.
- Two-thirds of American travelers agree that they do not want travelers coming to visit their community in the current environment (67.6%). Only one-in-ten disagree with this sentiment.
- One-third of American travelers agree that they will not be traveling until a vaccine for Covid-19 is developed (36.5%). A similar proportion of travelers (33.1%), however, currently reject this idea.
- Nearly nine-in-ten American travelers now report living in a community with known cases of the virus.
- While the scheduling of leisure trips in the next two months has dropped sharply, there appears to be some increases on the horizon for the summer and late fall months.

Key Findings

- **Interest in short trips rebounded slightly this week.** Over a third of American travelers (35.7%) 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 from 31.6 percent last week.
- **Travelers’ interest in learning about new travel experiences and destinations grew slightly this week.** Now, over four-in-ten (44.5%) expressed high levels of excitement about the topic, up from 37.0 percent last week.
- **New York continues to be the most talked about destination with coronavirus issues.** Nearly 90 percent of survey respondents identified New York as one of the three most talked about places.
- **When asked which specific travel behaviors they will likely avoid after the crisis is over, well over half said they would avoid cruises (57.5%) and crowded destinations (56.3%).**
- **It seems that Americans most miss their friends.** When asked to select the activities they most want to do after sheltering in place is finished, dining out with friends (40.9%) and hanging out with friends (39.6%) topped the list.





Section I: Current Feelings About Travel

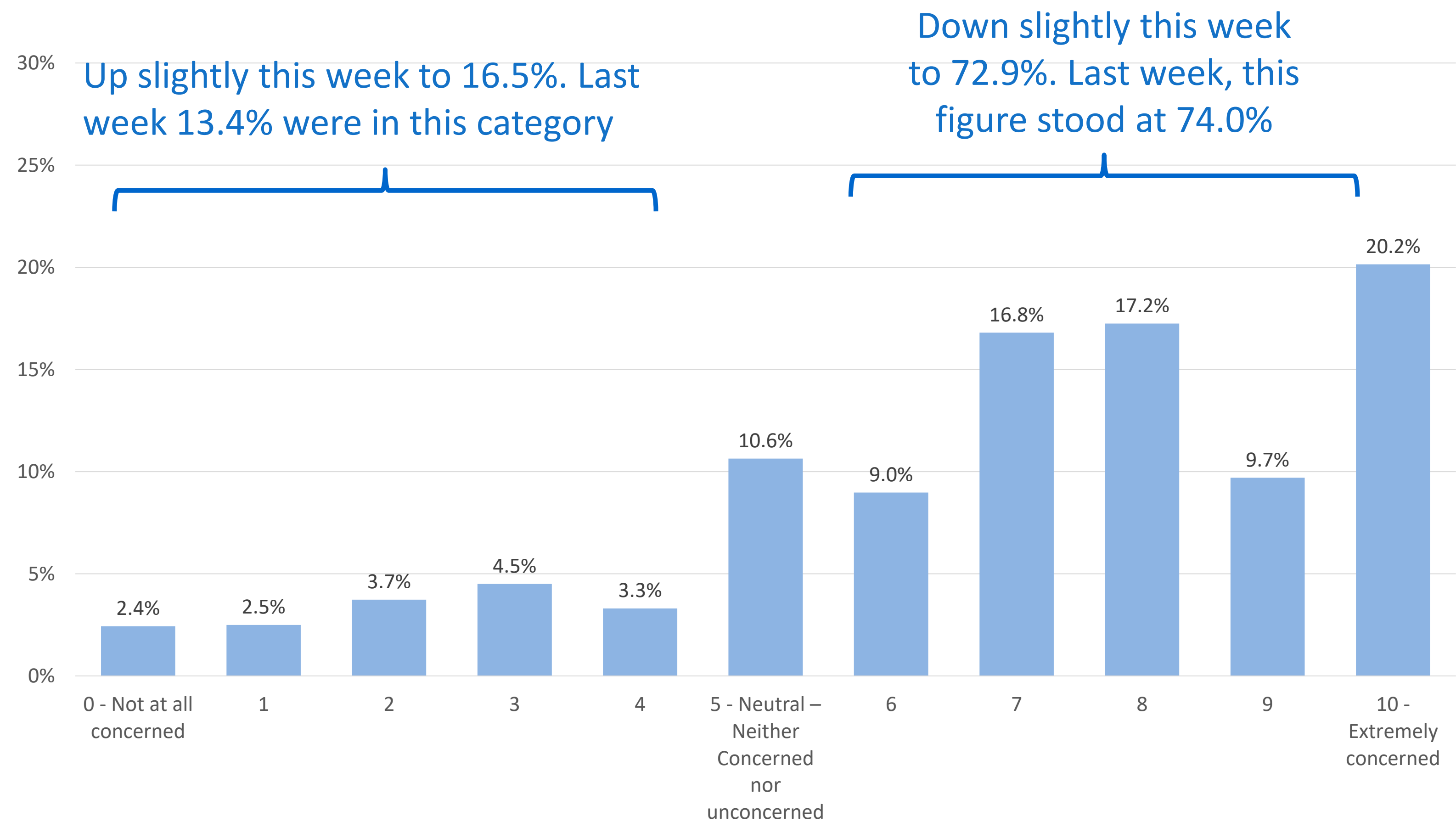


Personal Health Concerns

Americans’ concern about personally contracting the coronavirus inched downward this week. In total, 72.9 percent of survey respondents now say they have some level of concern about contracting the virus, nearly the same as 74.0 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 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



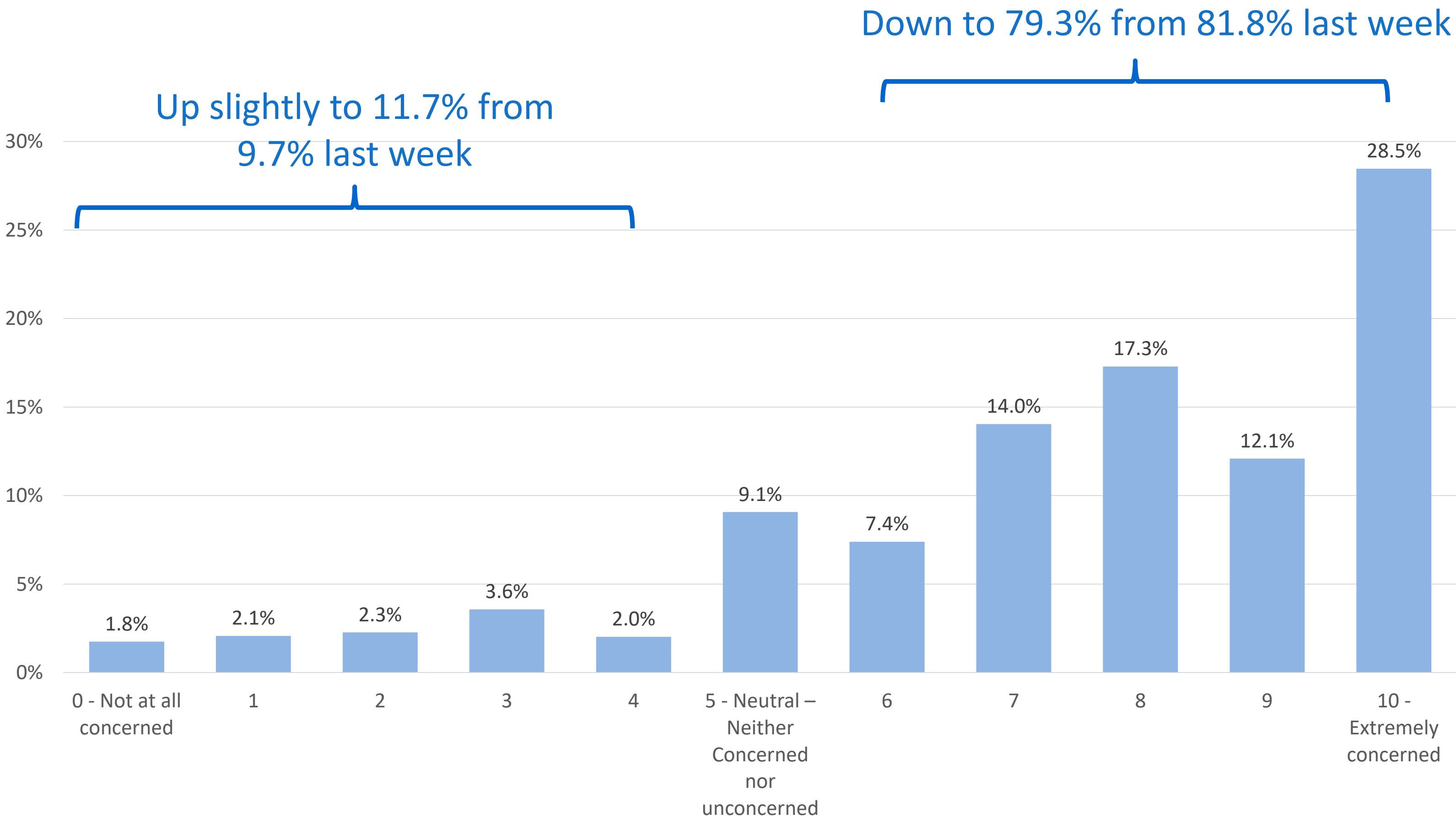
Wave 6 (April 17-19)

Health Concerns (Family & Friends)

For the second week in a row, concerns about the health of friends and family dropped slightly, with 79.3 percent expressing concern for the safety of their loved ones, down slightly from 81.8 percent last week.

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

(Base: Wave 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



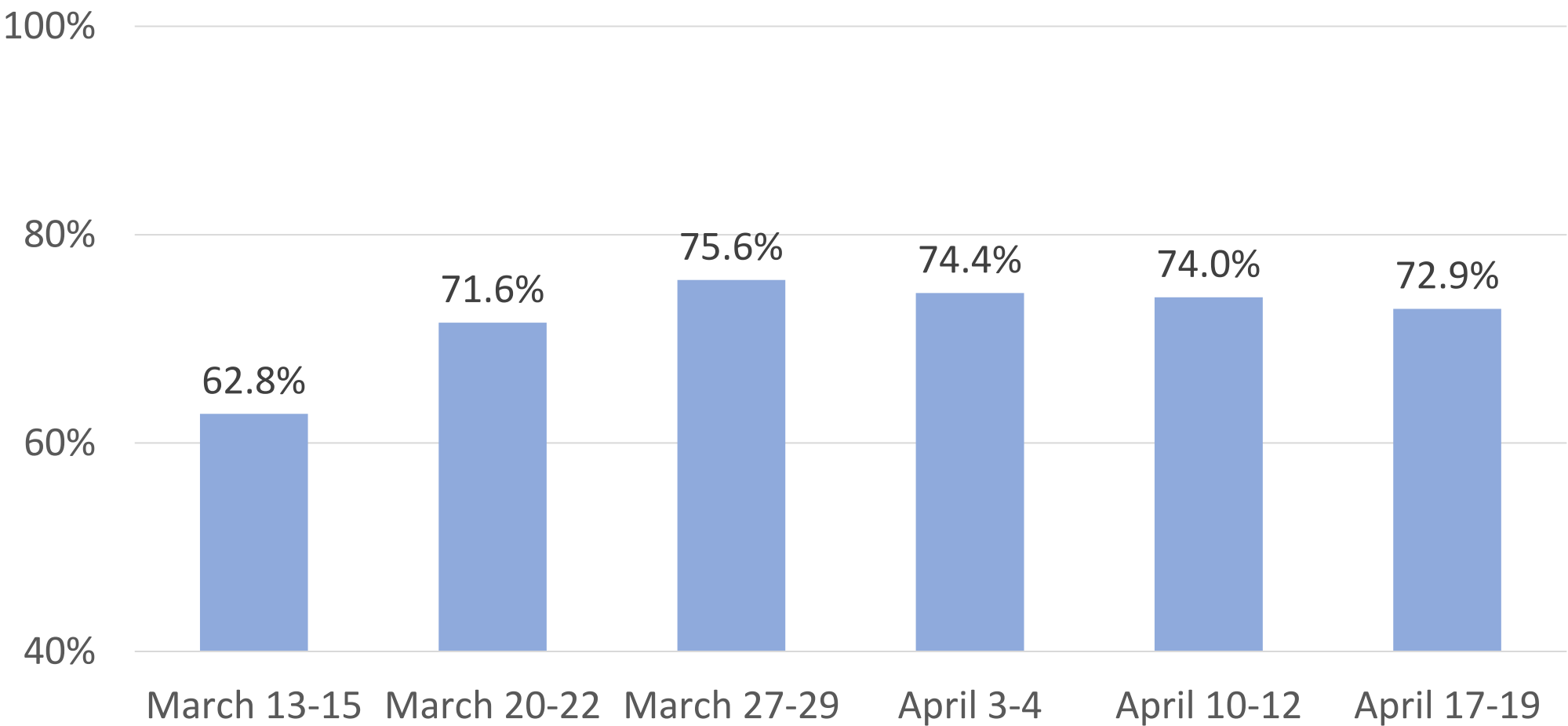
Wave 6 (April 17-19)

Summary: Safety Concern Metrics

Summary charts for the safety concern metrics are shown below.

Concern About Contracting Virus (Personally)

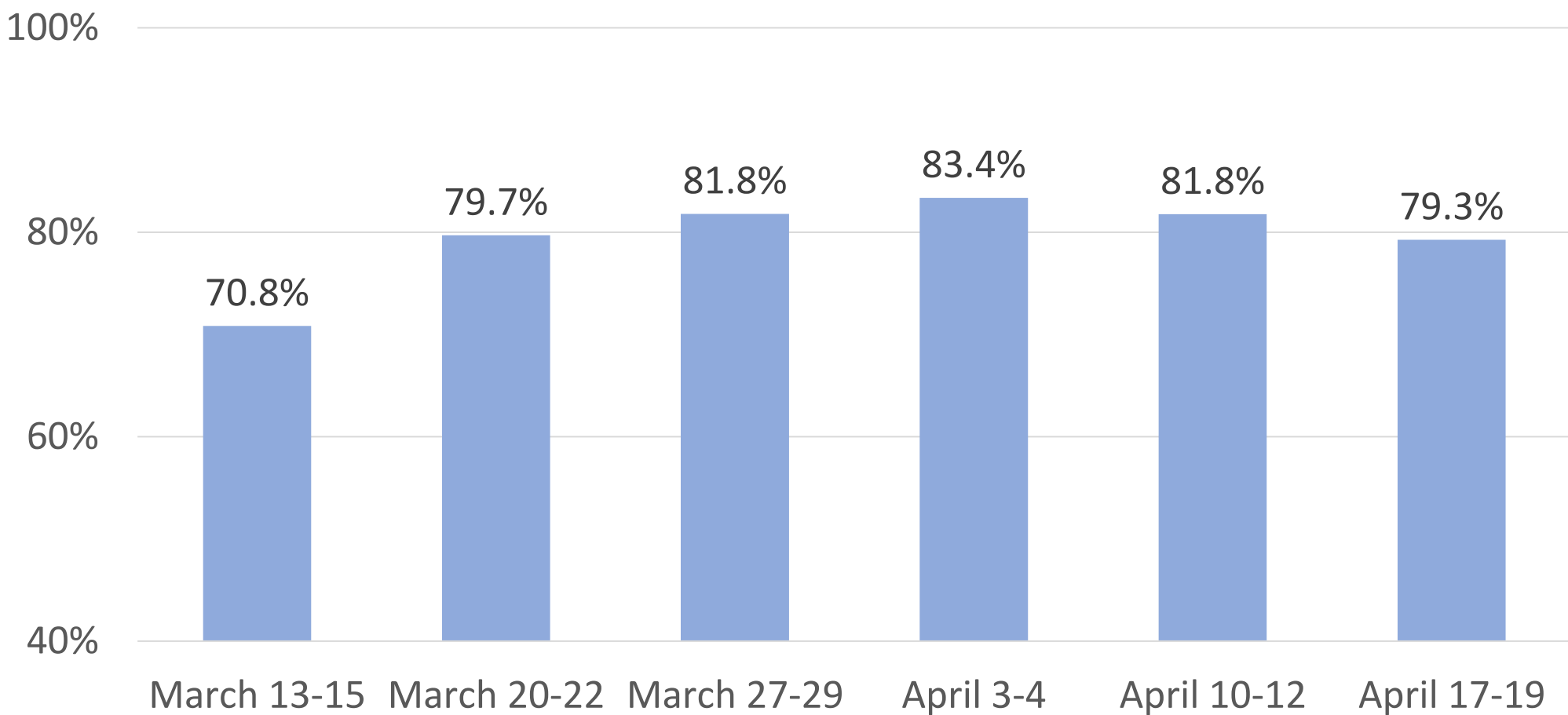
(% answering 6-10 on 11-point scale)



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

Concern About Loved Ones Contracting Virus

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



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

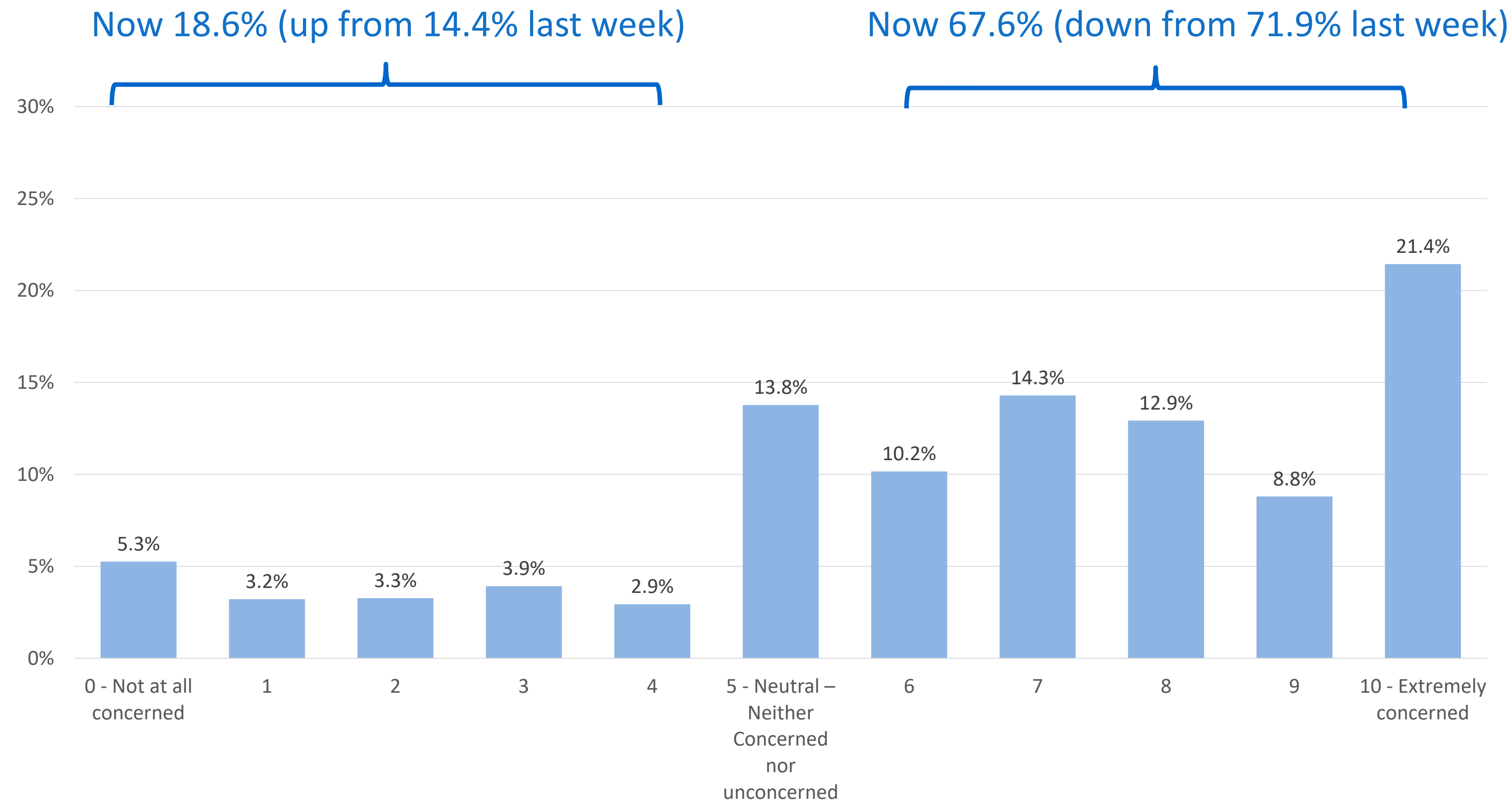
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Concerns About Personal Finances

Concern that the pandemic will impact their personal finances lessened somewhat this week, dropping from 71.9 percent to 67.6 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 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



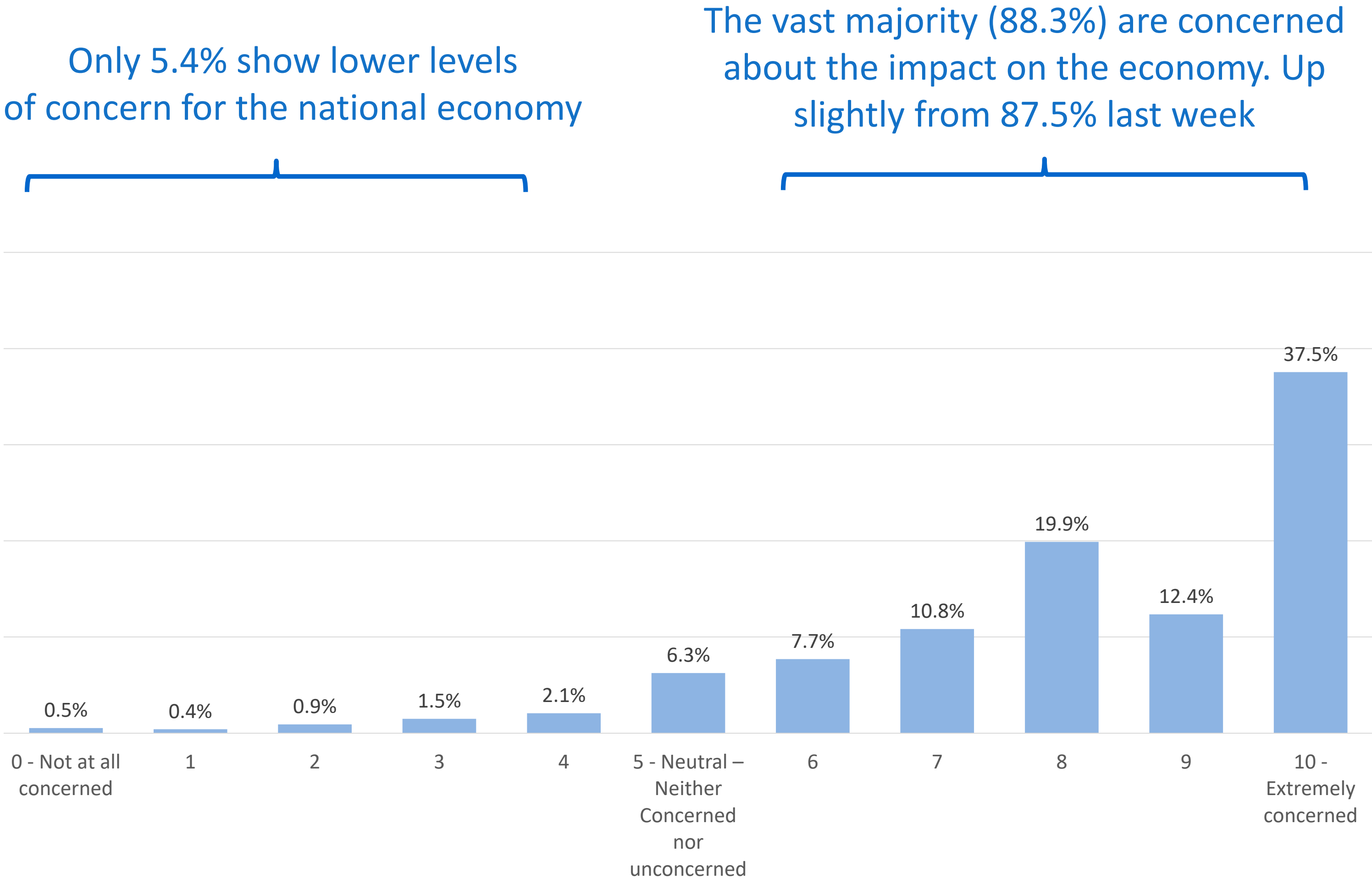
Wave 6 (April 17-19)

Concerns About National Economy

National economic concerns remain high. Nearly 90 percent of travelers expressed some level of concern for the national economy.

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

(Base: Wave 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



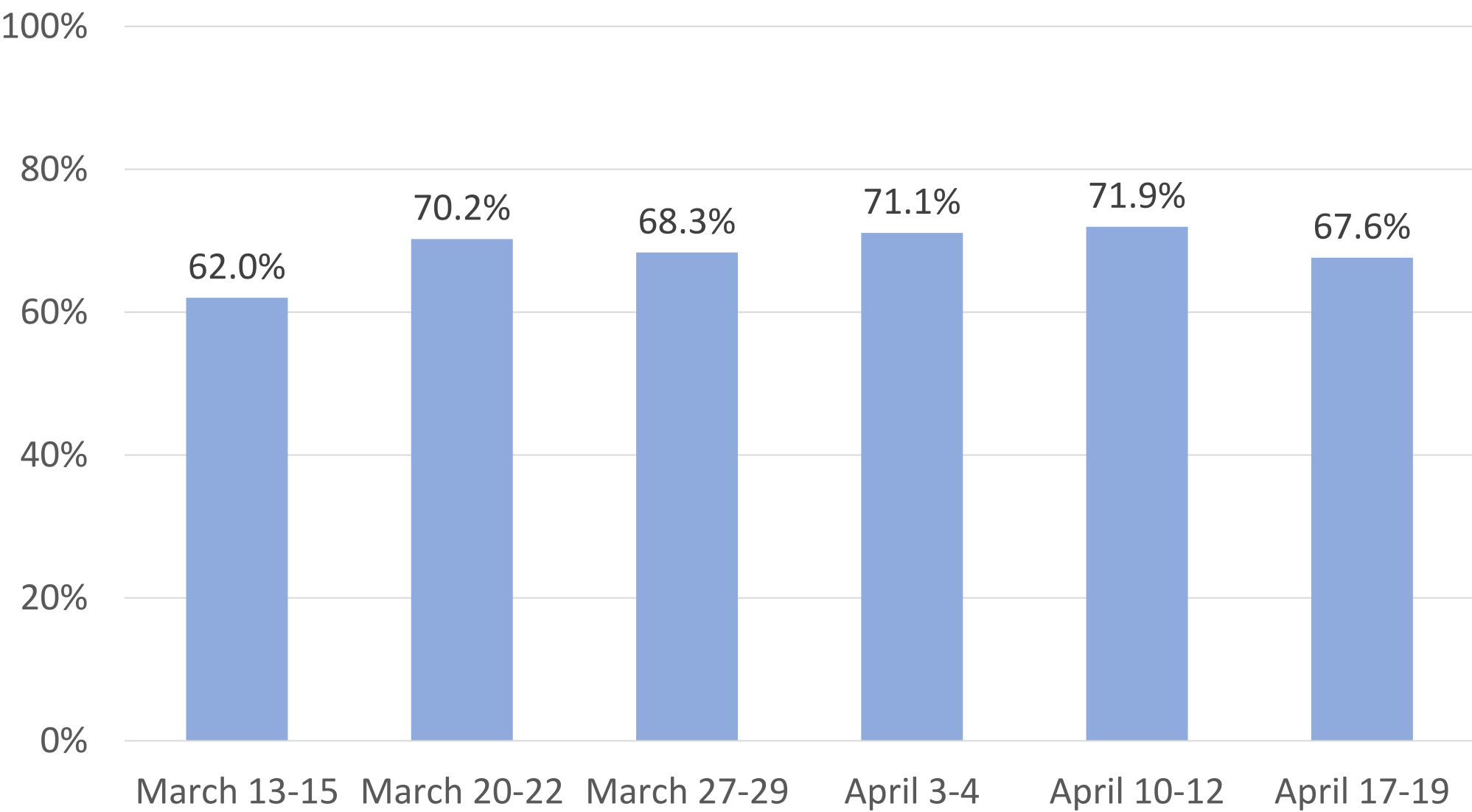
Wave 6 (April 17-19)

Summary: Economic Concern Metrics

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

Personal Finances

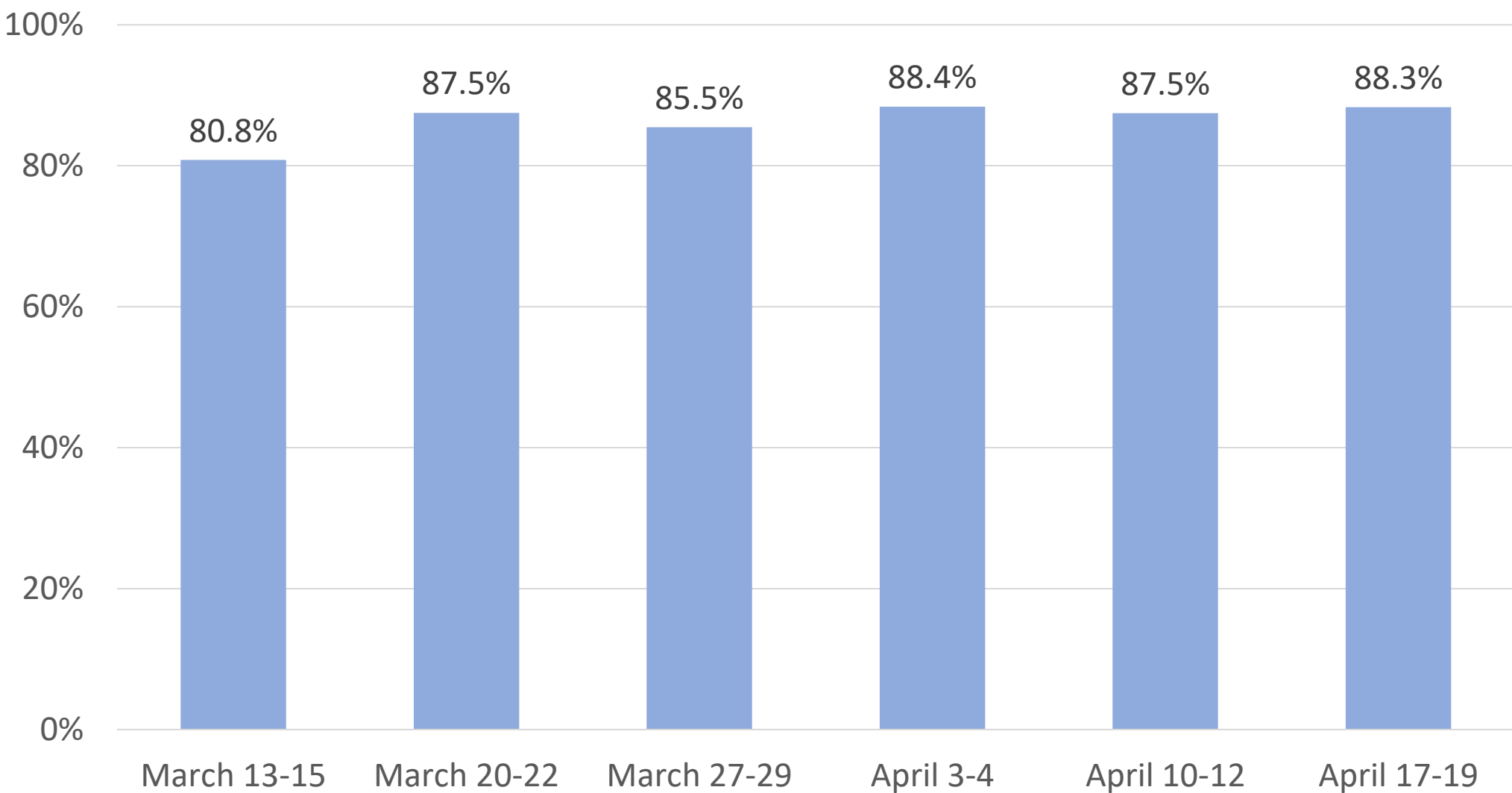
(% answering 10-6 on 11-point scale)



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

National Economy

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



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

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

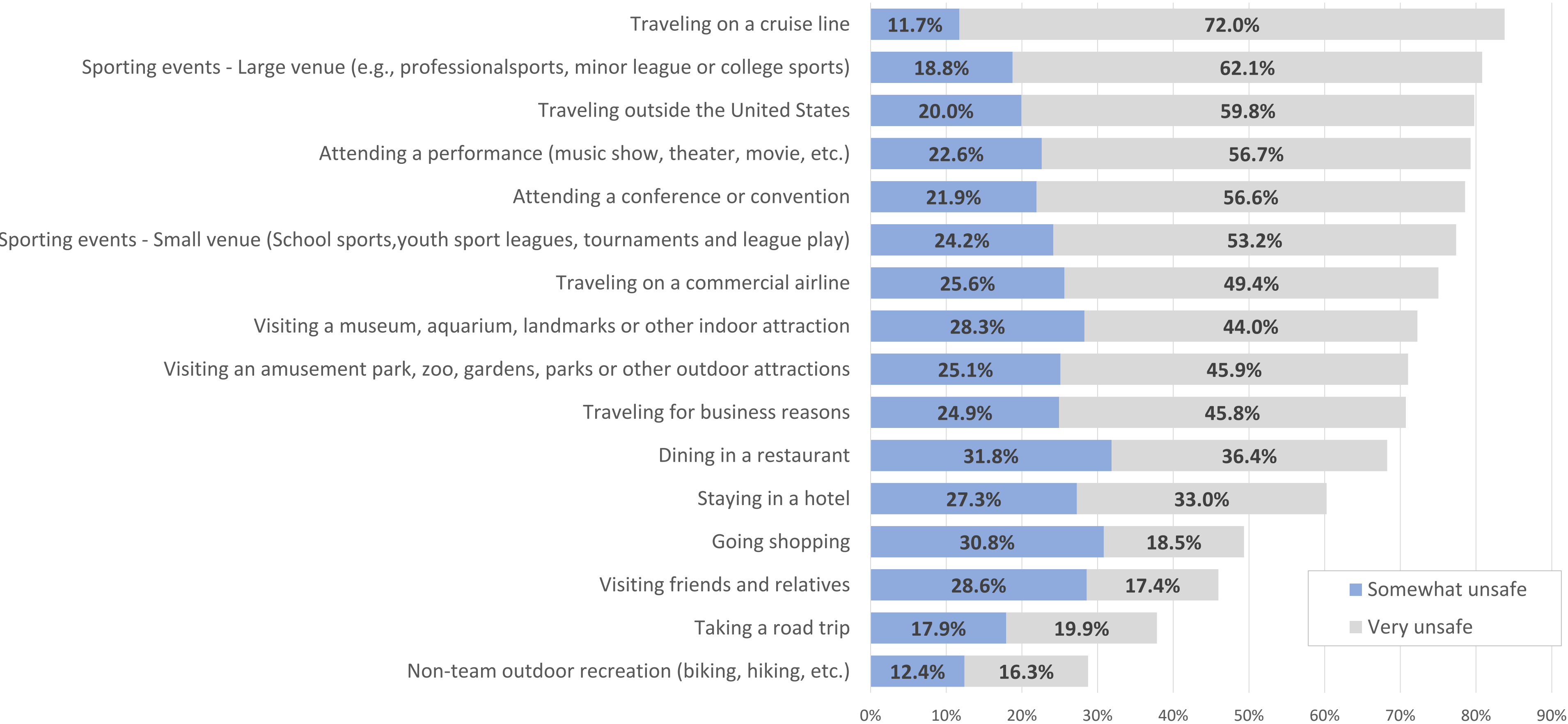
Perceived Safety of Travel Activities (Wave 6)

Cruises continue to be seen as the least safe travel activity. 83.7 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 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

Wave 6 (Collected April 17-19)

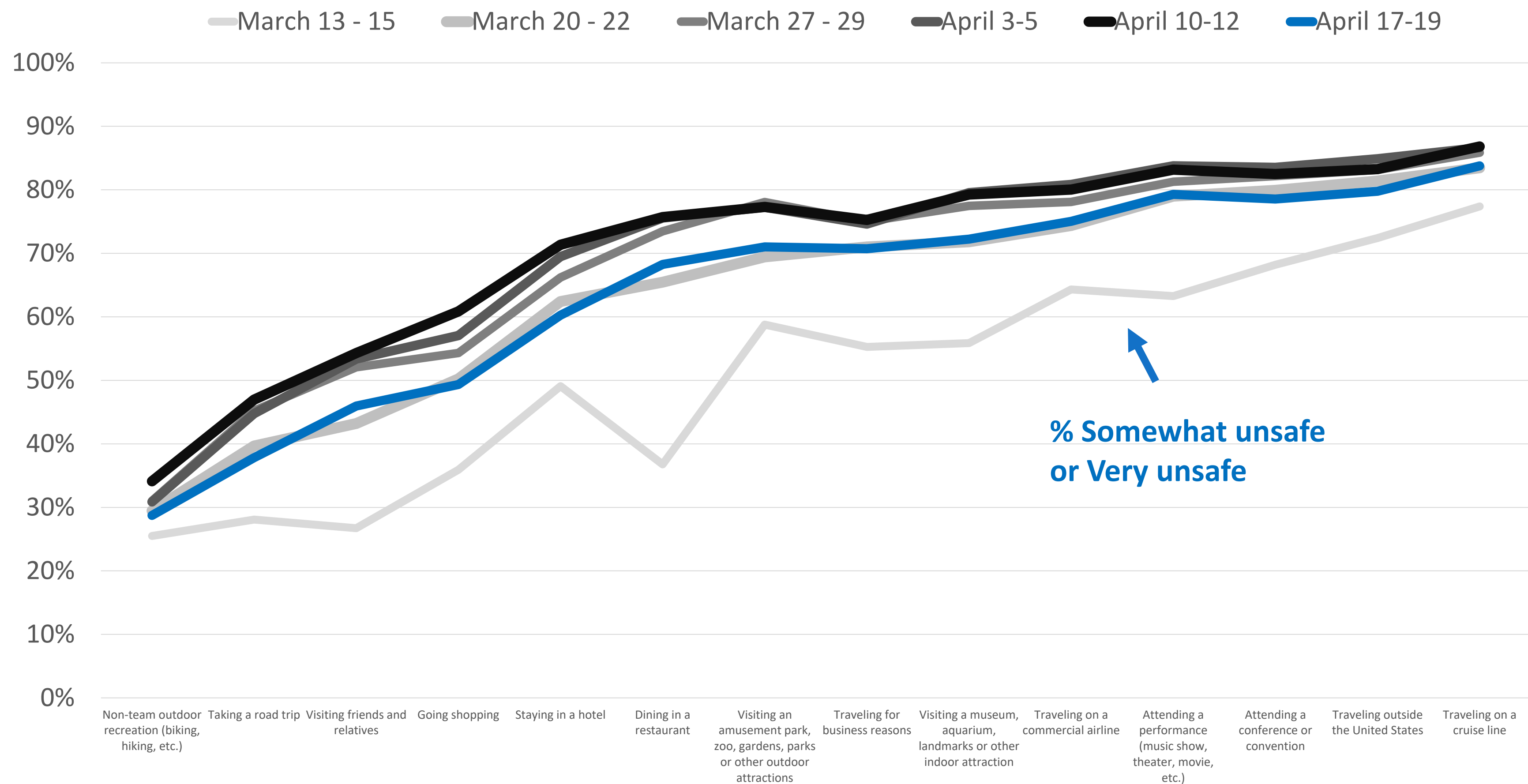


Perceived Safety of Travel Activities (Waves 1-6 Comparison)

Over the last several weeks, the perceived safety of various travel activities had stabilized, and this week improved. In the sixth wave, the proportion of travelers rating each activity as either “Somewhat unsafe” or “Very unsafe” decreased, in some cases significantly.

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

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



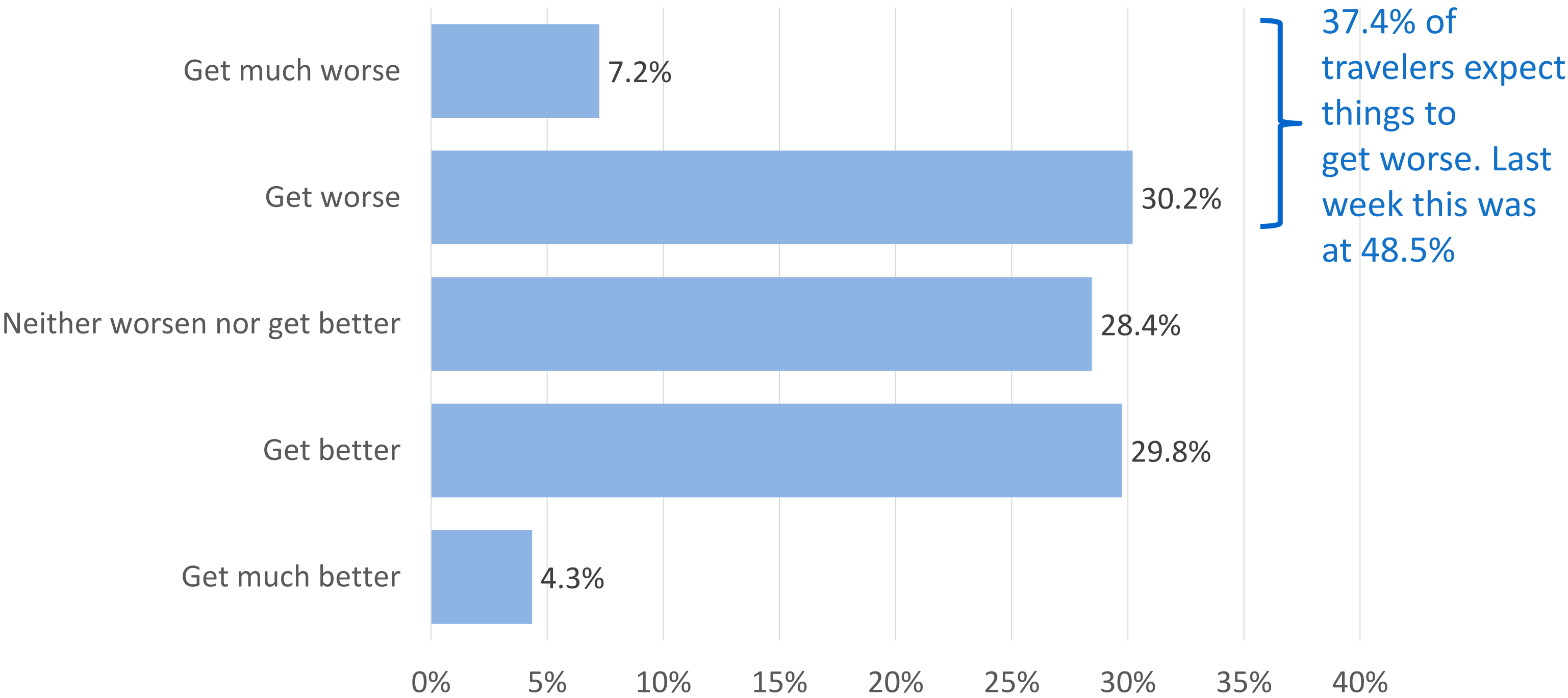
Expectations for the Coronavirus Outbreak

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: Wave 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

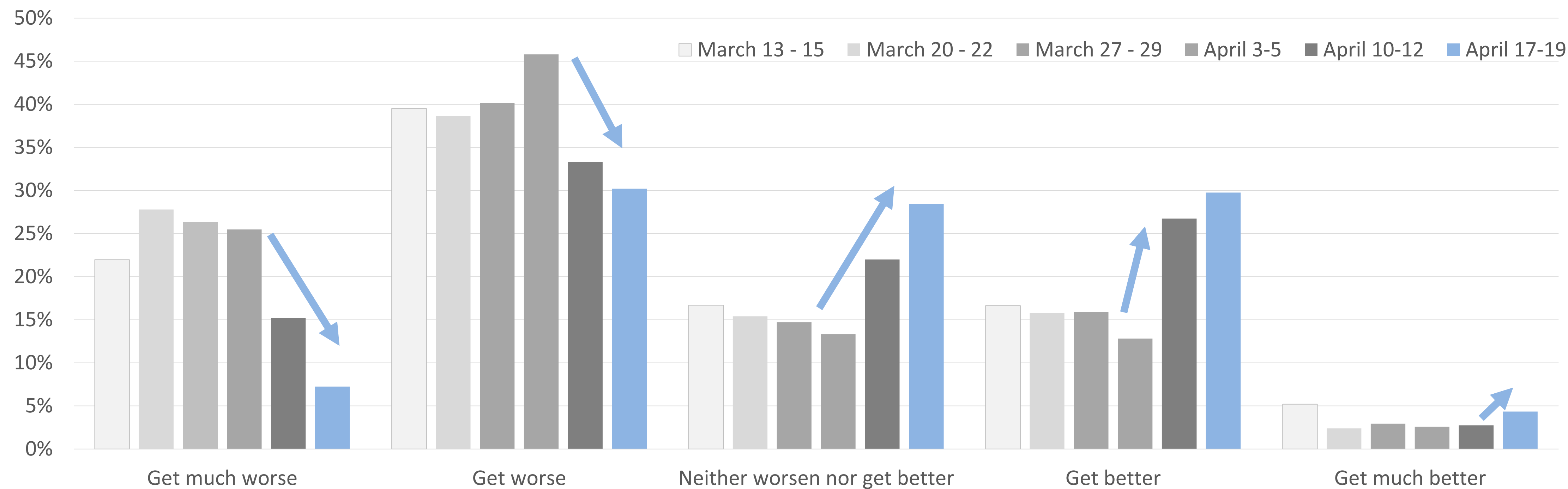
In a major change this week, far fewer travelers feel the situation will get worse in the next month. This week, only 37.4 percent expect the coronavirus situation to get worse in the next month, down sharply from 48.5 percent last week.



Expectations for the Coronavirus Outbreak

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

In the next month the coronavirus situation will _____

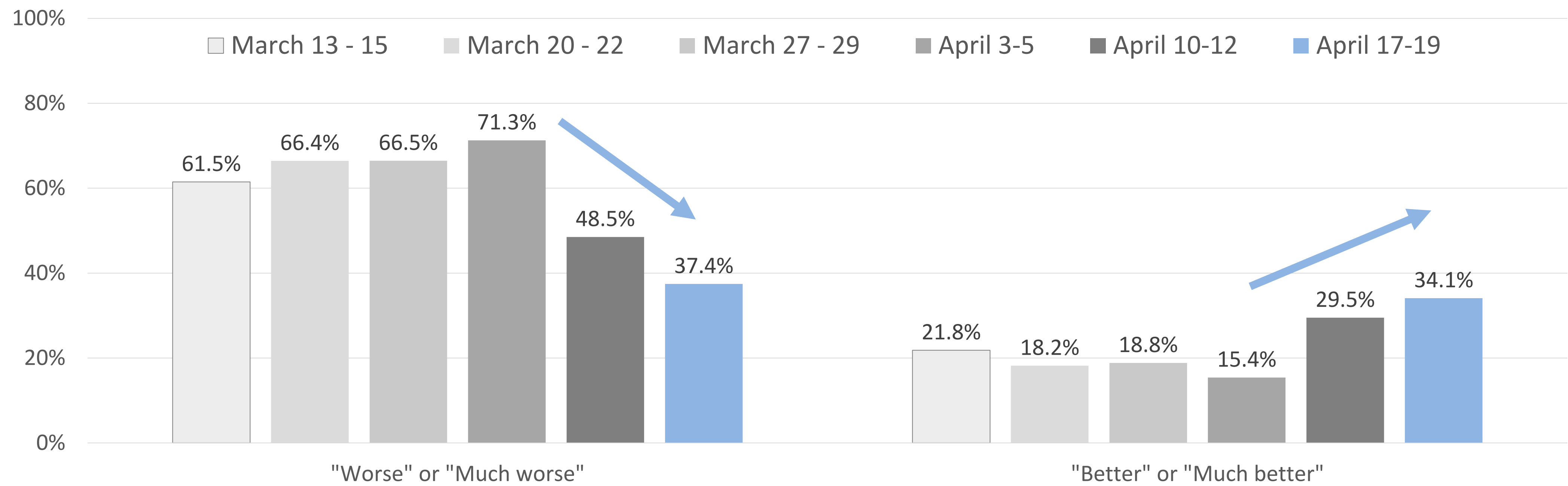


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

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 _____

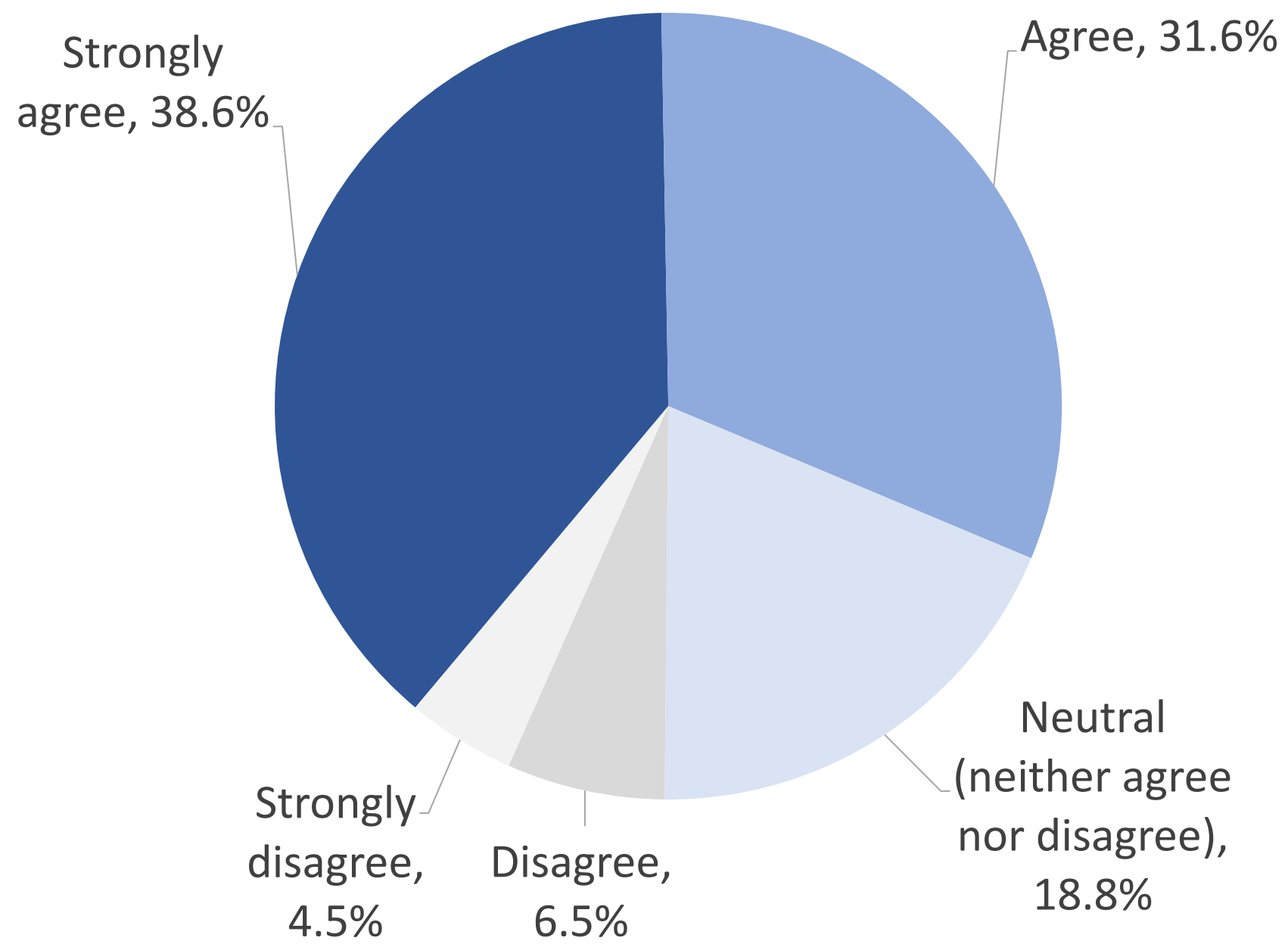


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Excitement to Get Back to Travel

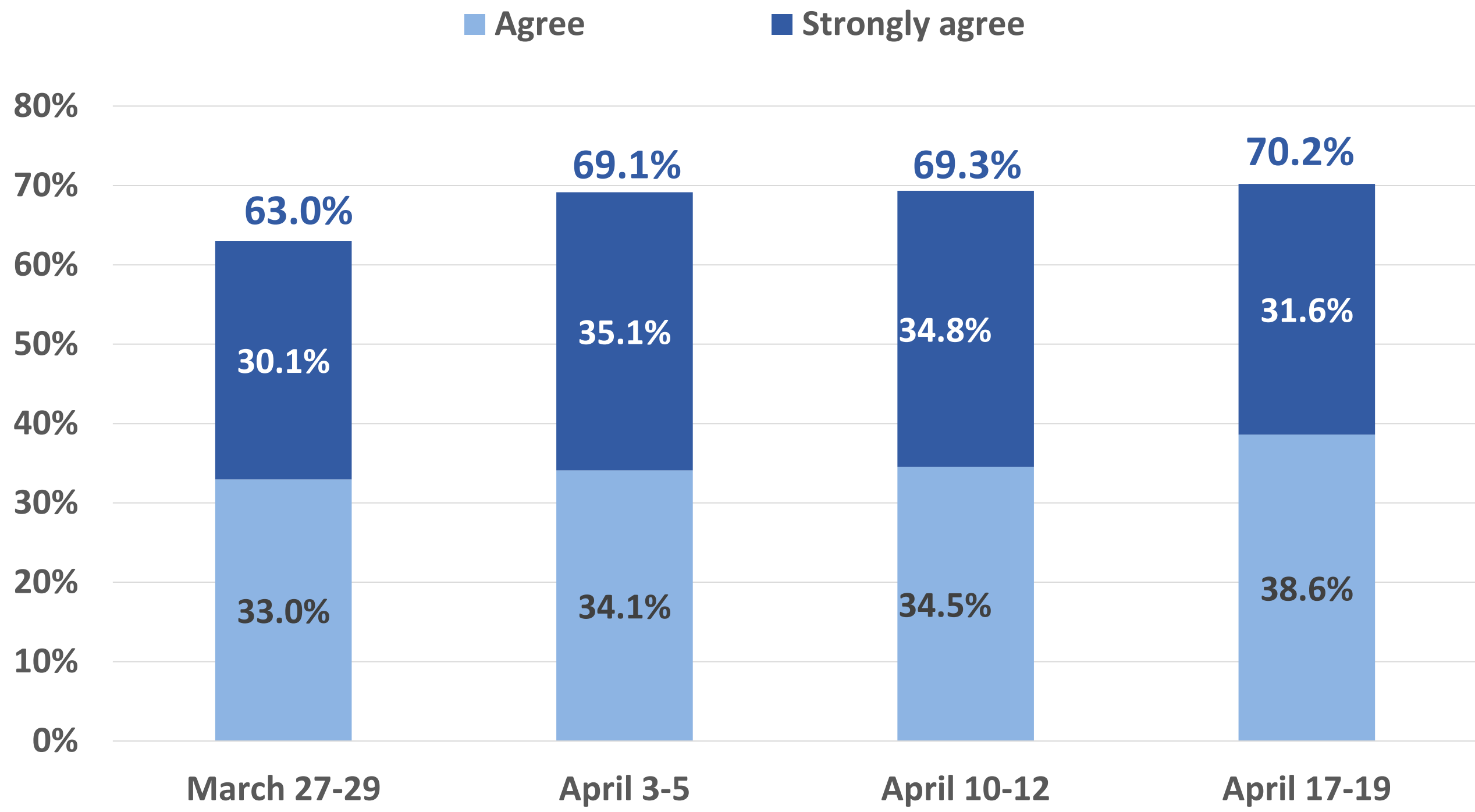
How much do you agree with the following statement?

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



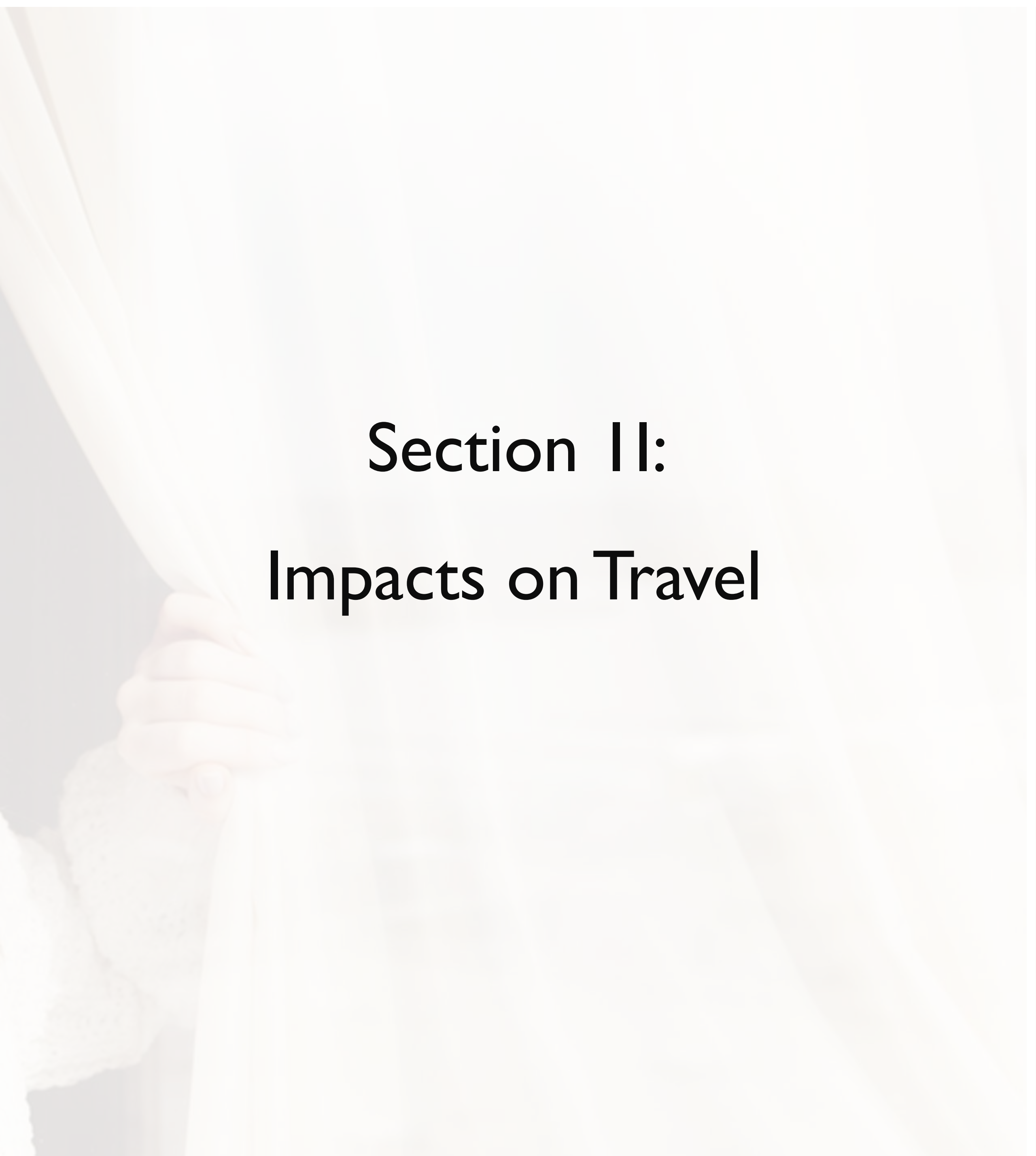
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Traveler excitement to get back out on the road stayed constant this week, as 70.2 percent of American travelers agree that they miss traveling and can't wait to get out and travel again.





Section II: Impacts on Travel

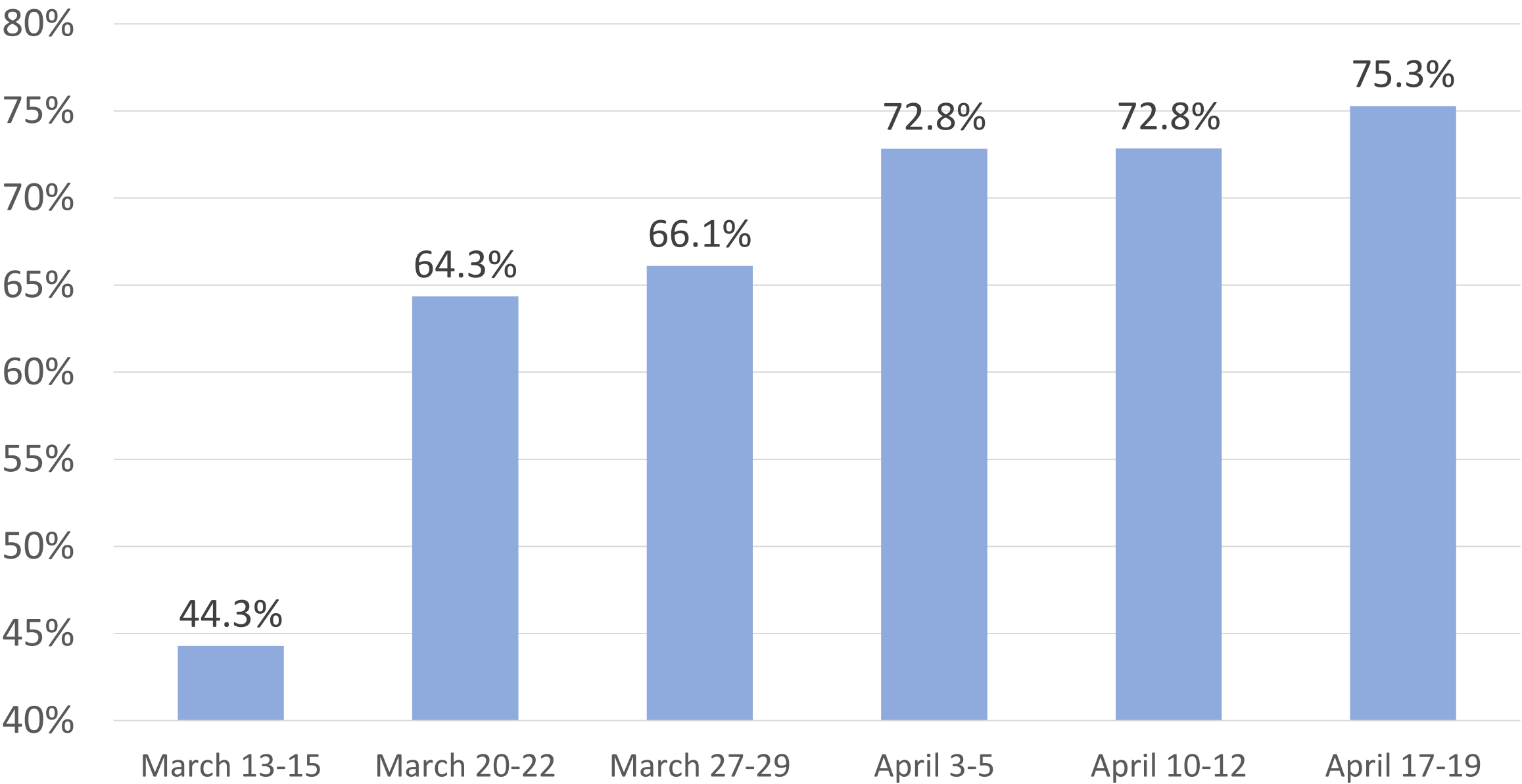
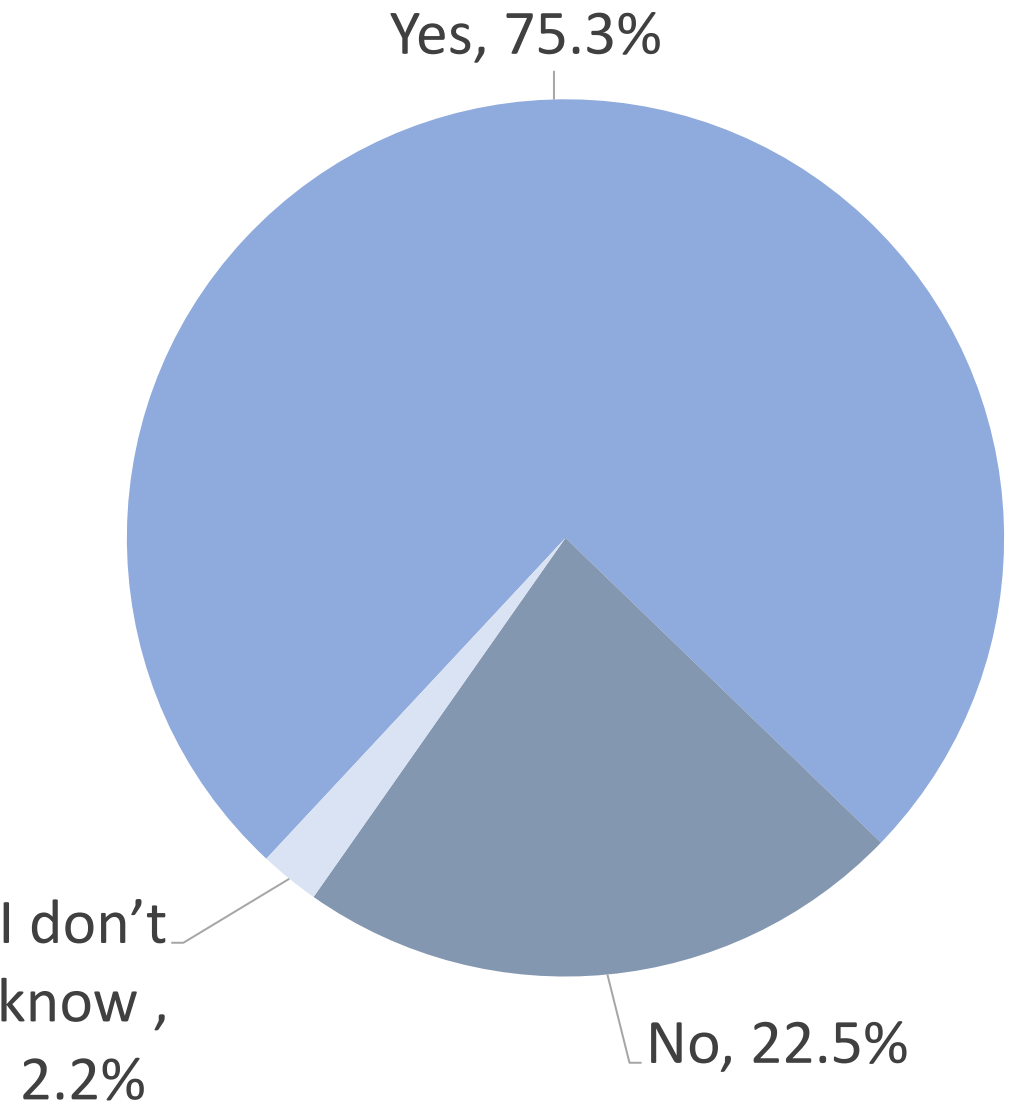


Impact of the Coronavirus on Travel

Question: Has the current coronavirus situation affected your travel in any way? (Please consider all your travel--leisure, business, group meeting, etc.)

In the sixth wave of this survey, the proportion of American travelers who reported having their travels impacted by the coronavirus increased to 75.3 percent.

Wave 6 (April 17-19)



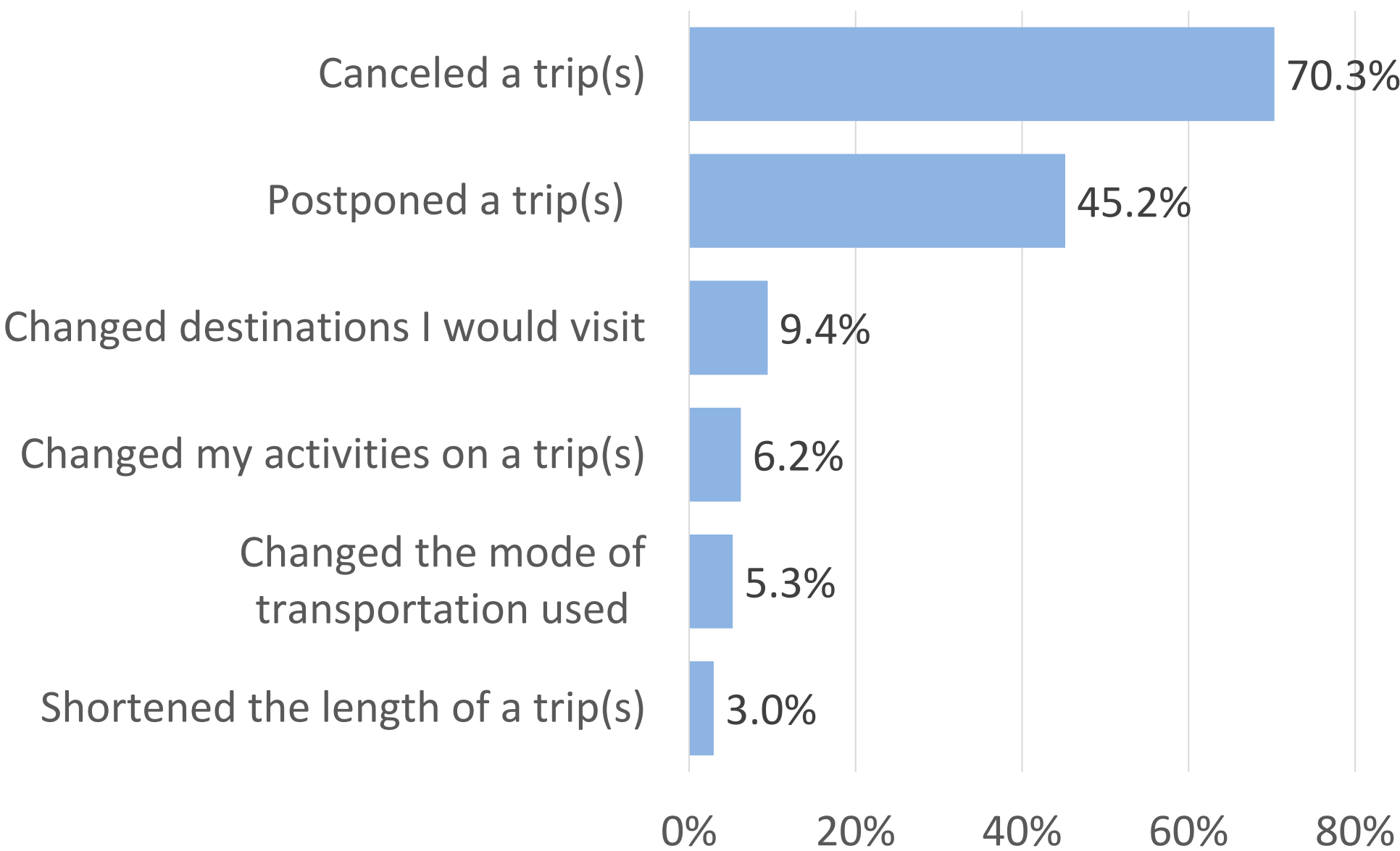
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

How the Coronavirus has Impacted Travel

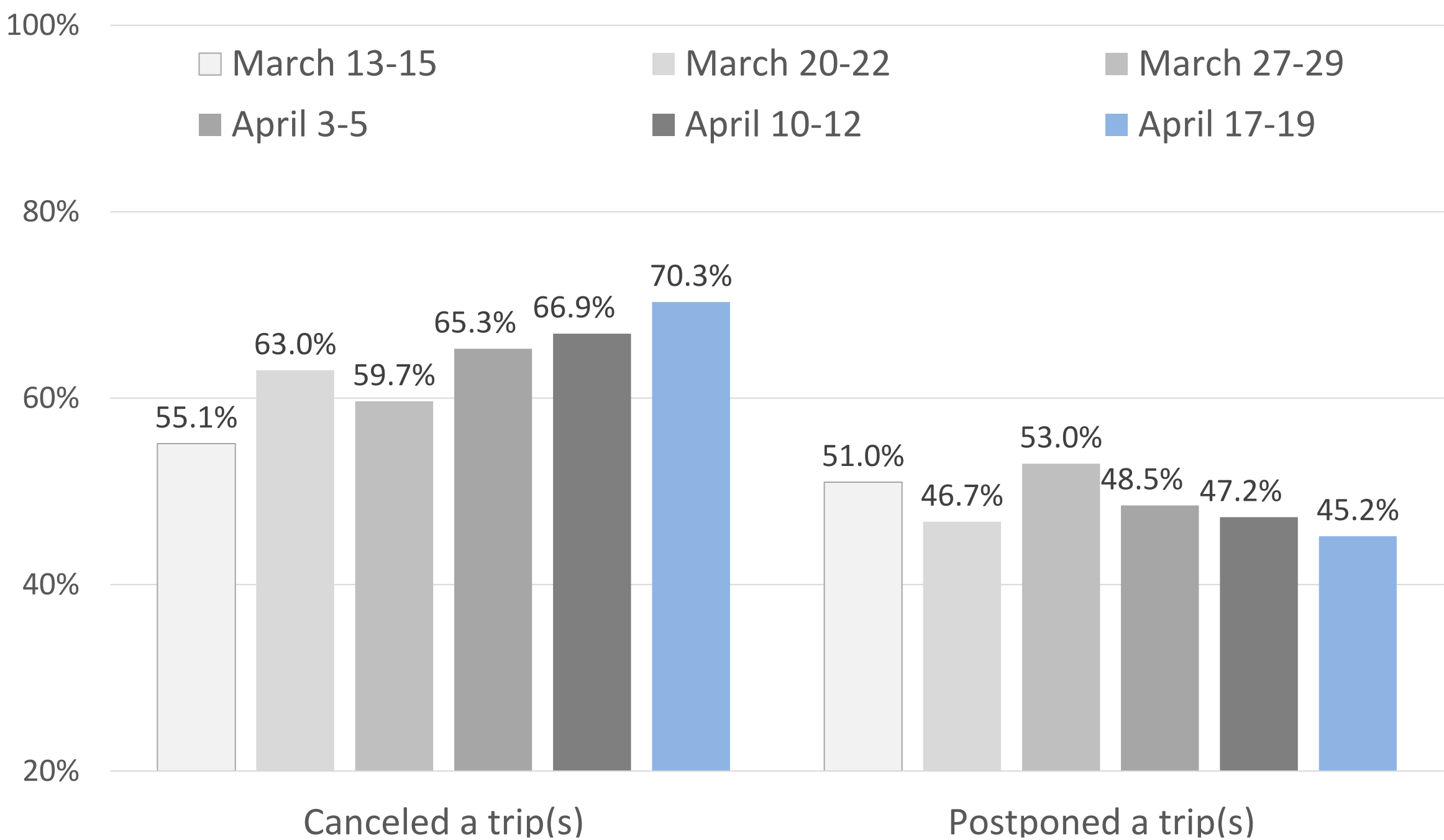
Question: How has the coronavirus situation affected your travel? (Select all that apply)

Due to the coronavirus situation, I have_____.

Wave 6 (April 17-19)



Over the last six weeks, the proportion of American travelers cancelling trips due to the coronavirus has grown from 55.1 percent to 70.3 percent.



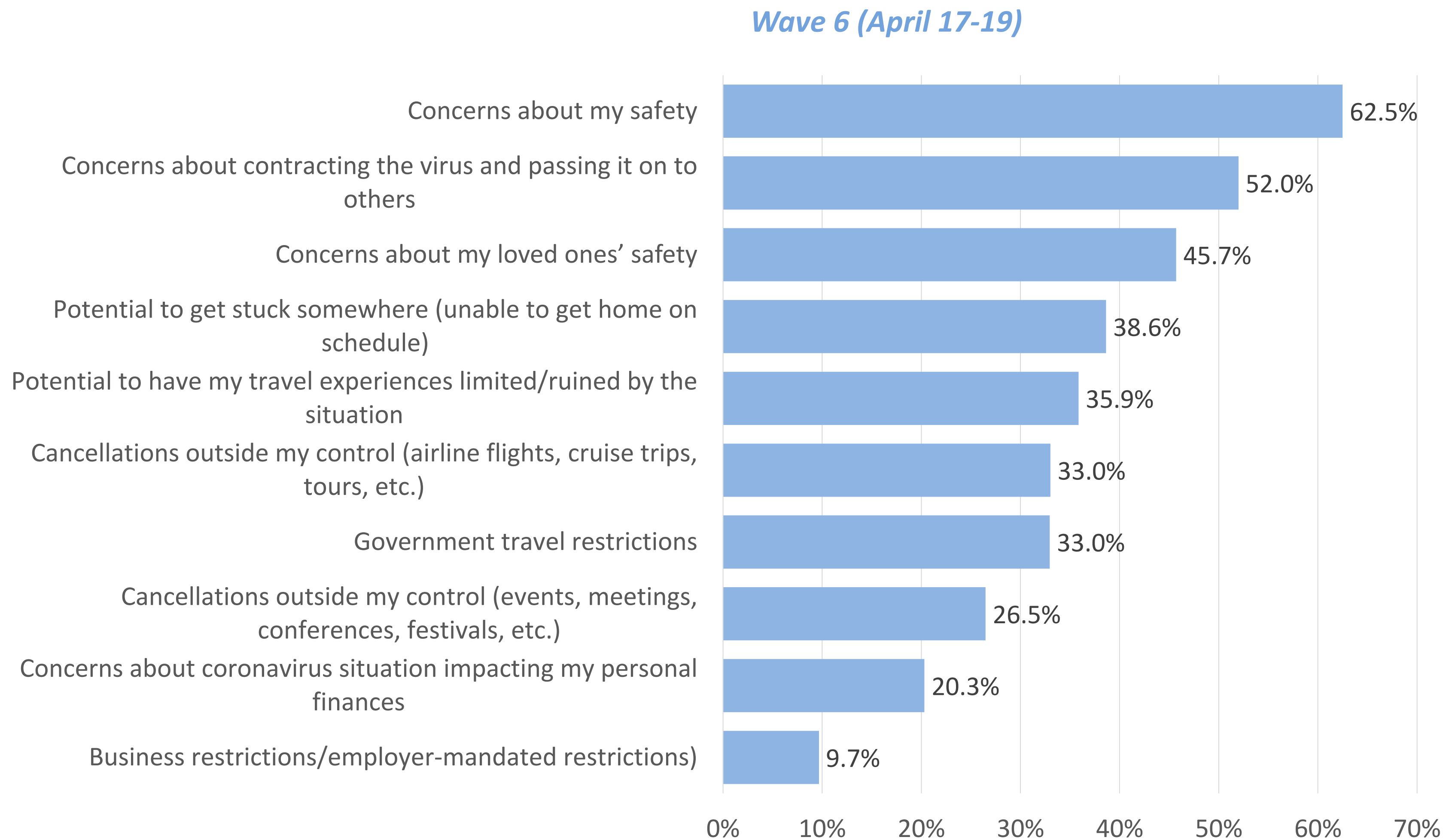
(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795, 890, 937 and 929 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12 and 17-19, 2020)

Why the Coronavirus is Impacting Travel

Concerns about personal safety continue to top the reasons expressed for why Americans have changed their travels, with two-thirds of respondents citing it as a reason (62.5%).

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

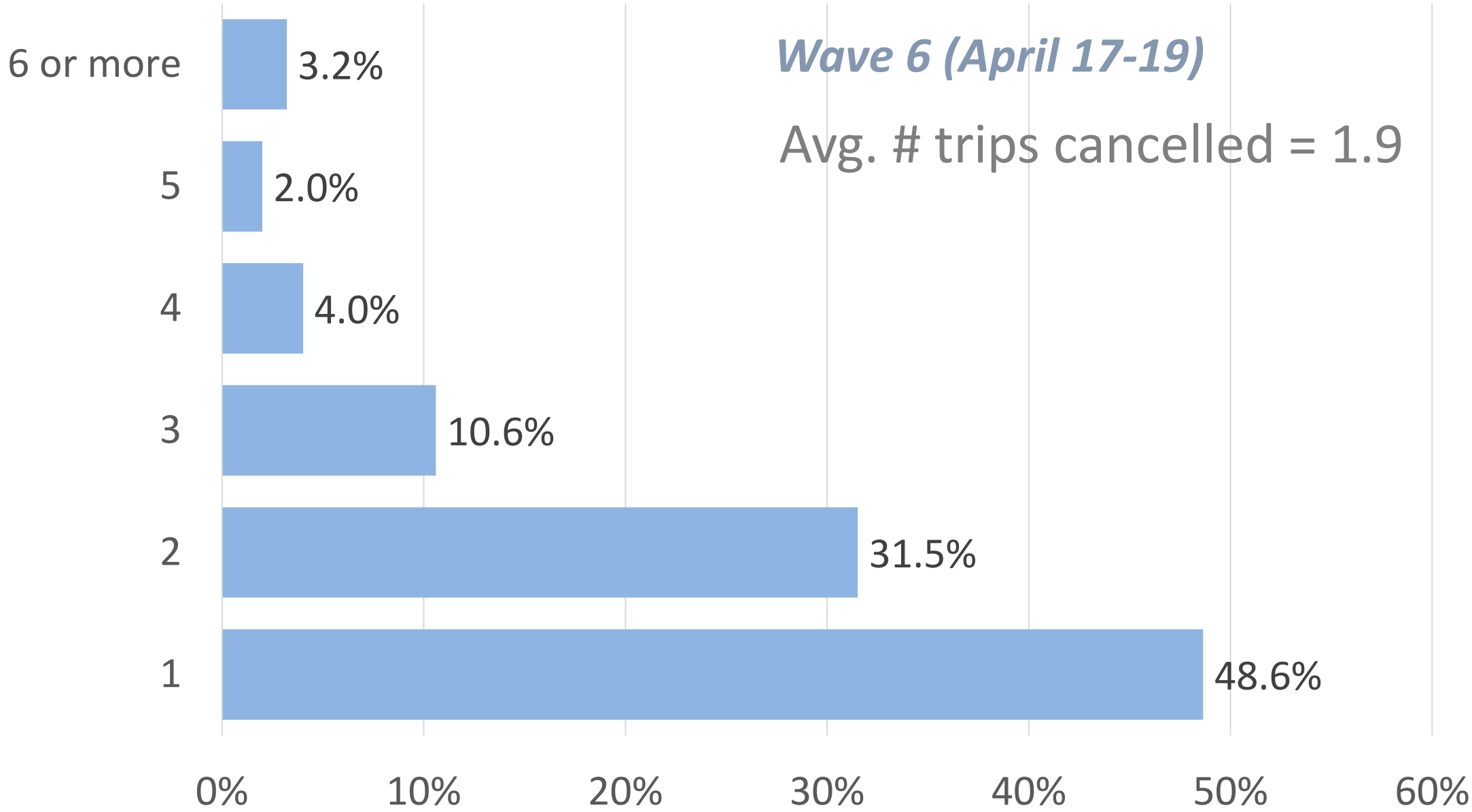
(Base: Wave 6. Respondents whose travel was impacted by the coronavirus, 927 completed surveys. Data collected April 17-19, 2020)



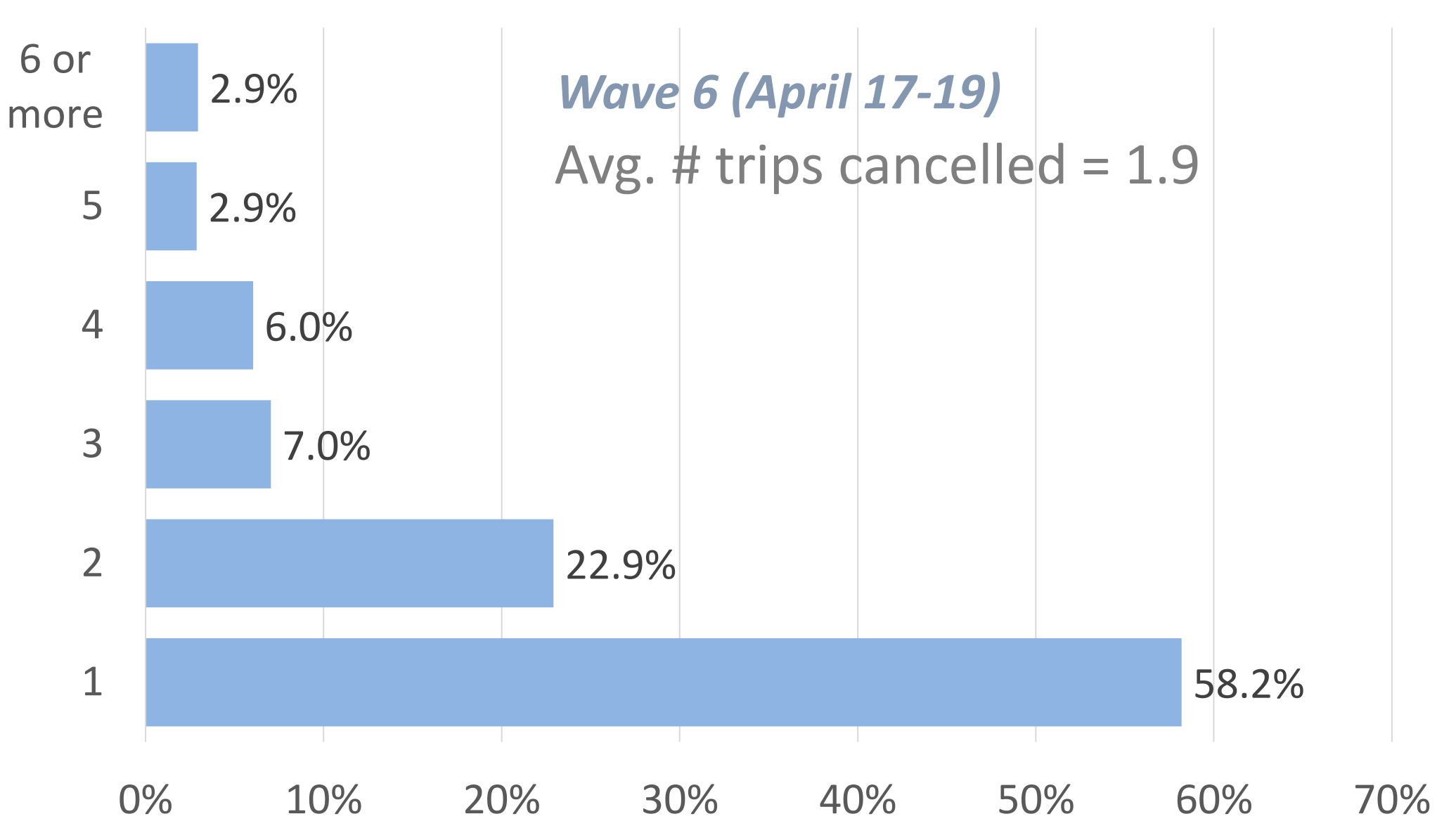
Trips Cancelled/Postponed

The average American traveler who has cancelled a trip says they have done so for 1.9 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?



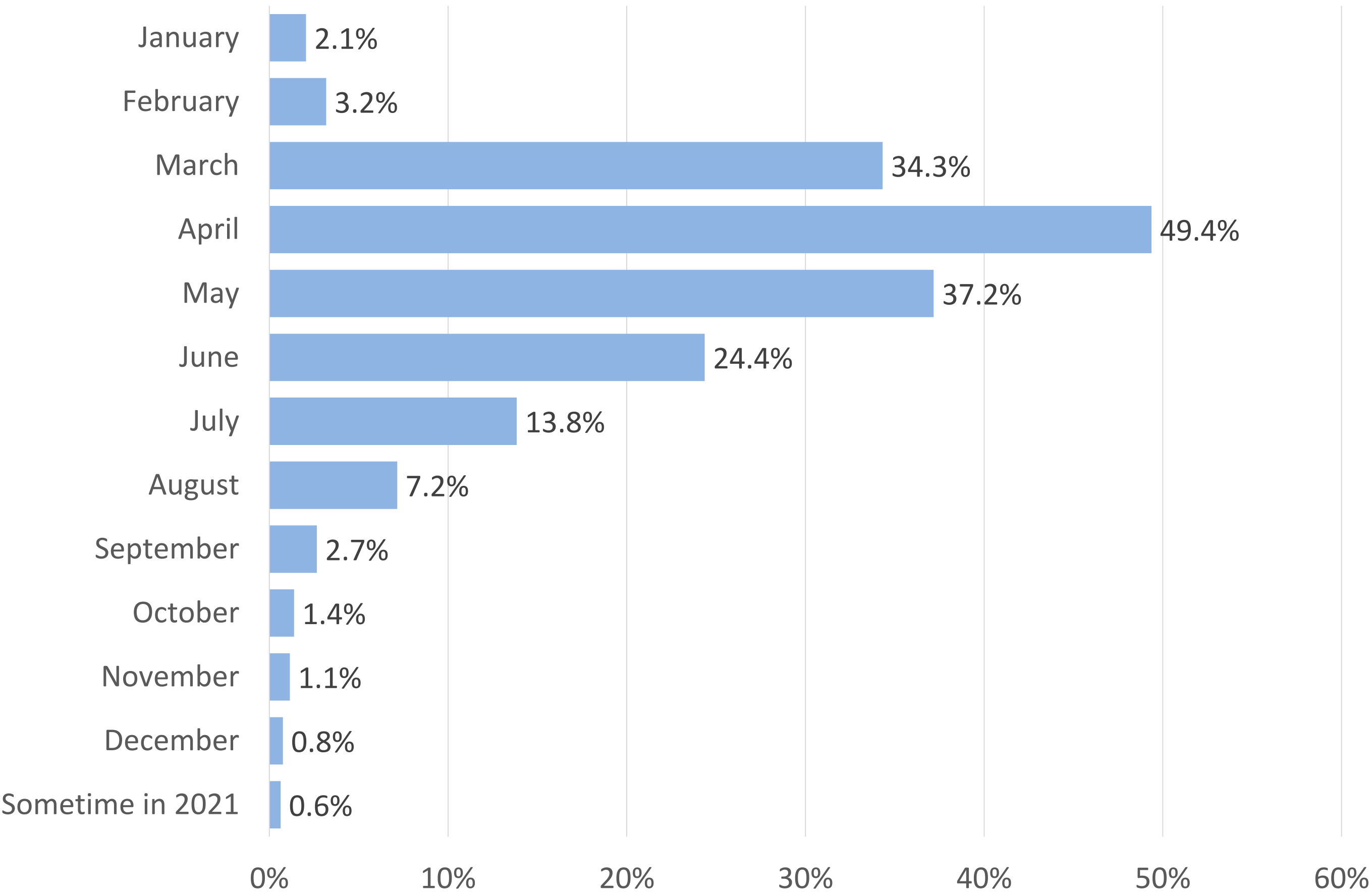
(Base: Wave 6. Respondents cancelling/postponing a trip, 644/438 completed surveys. Data collected April 17-19, 2020)

Month of Trip Cancellation

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

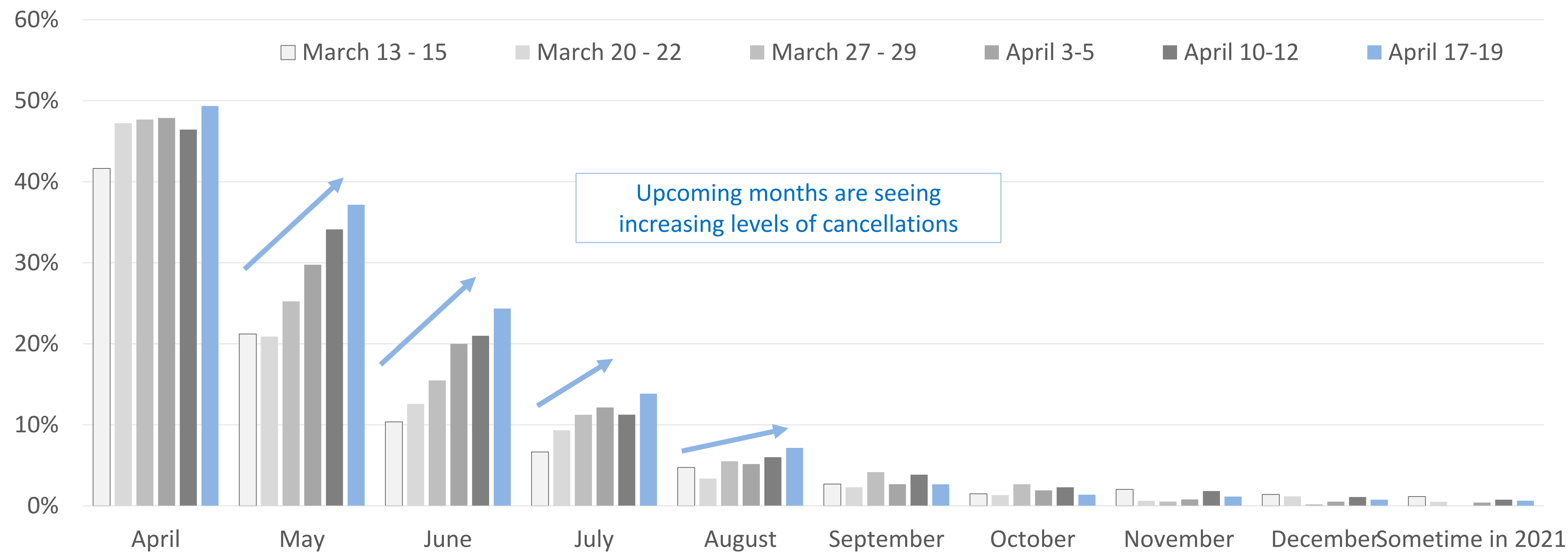
(Base: Wave 6. Cancelling trips, 643 completed surveys. Data collected April 17-19, 2020)

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



Month of Trip Cancellation

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

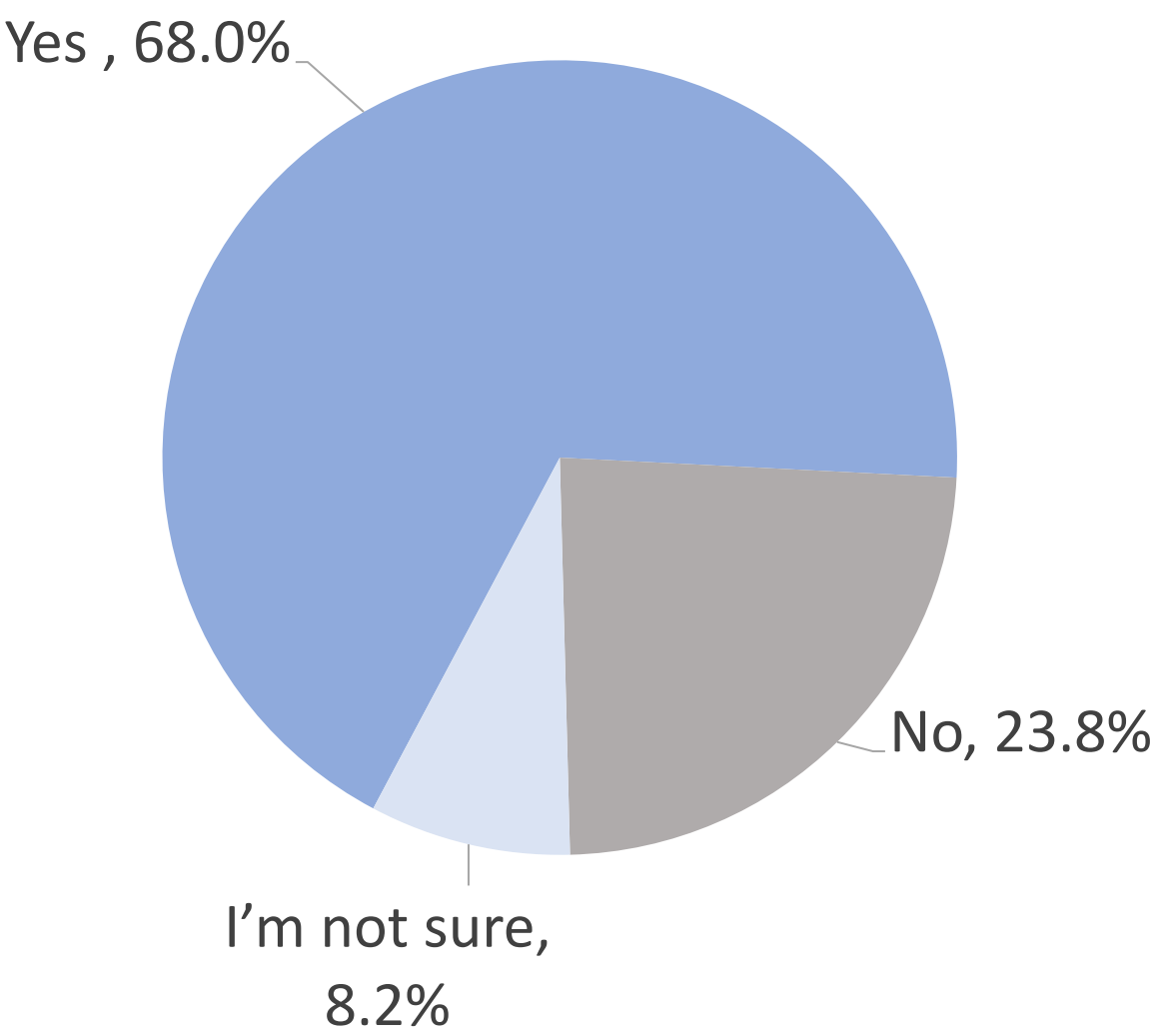


(Base: Cancelling trips, 292, 477, 506, 580, 623 and 643 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020. Note: Data purposefully excluded from this chart for readability.)

Did Traveler Get Full Refunds?

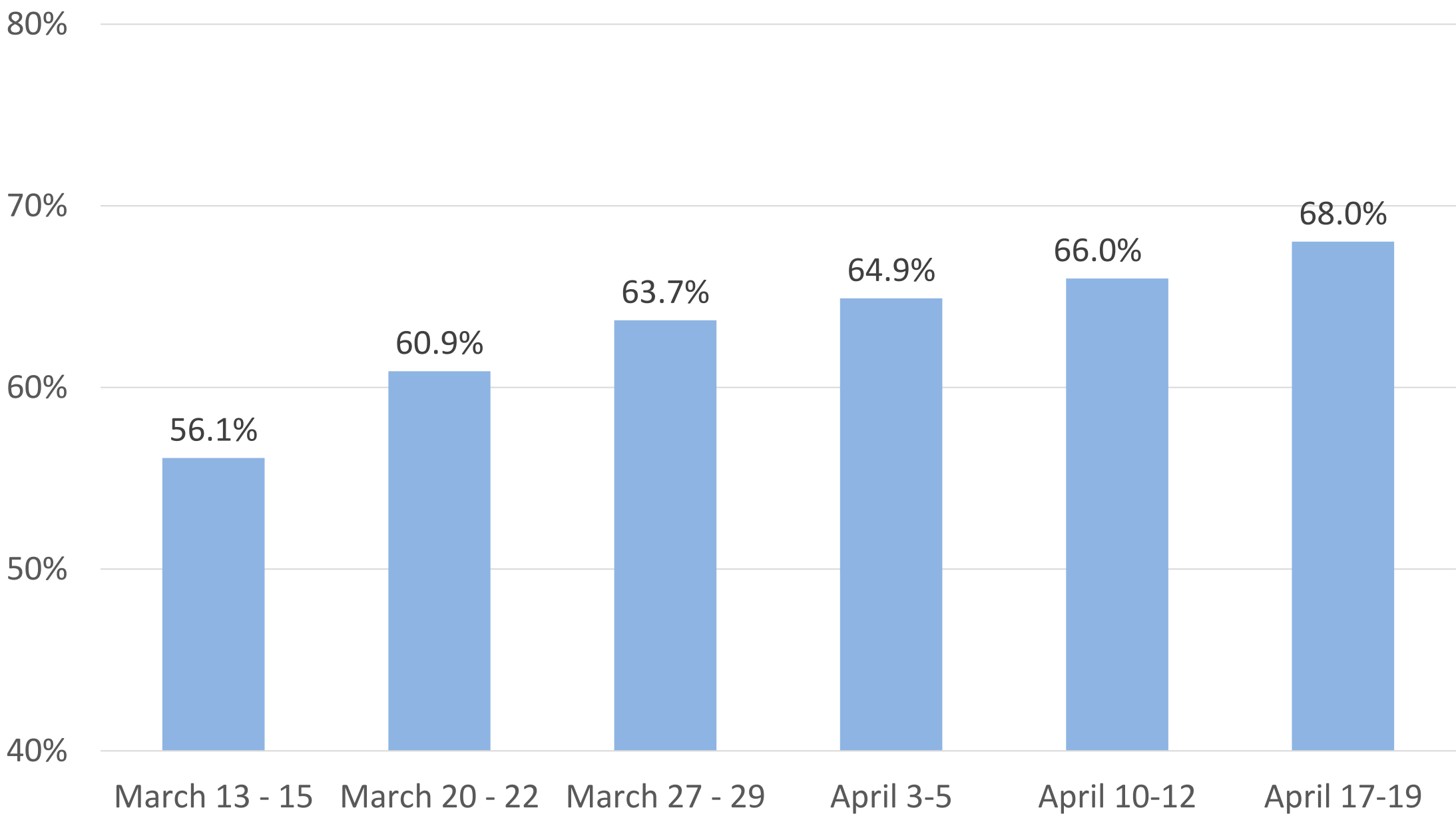
Question: Did you get full refunds for any reservations you canceled? (Select one)

Wave 6 (April 17-19)



(Base: Wave 6. Respondents cancelling a trip, 643 completed surveys. Data collected April 17-19, 2020)

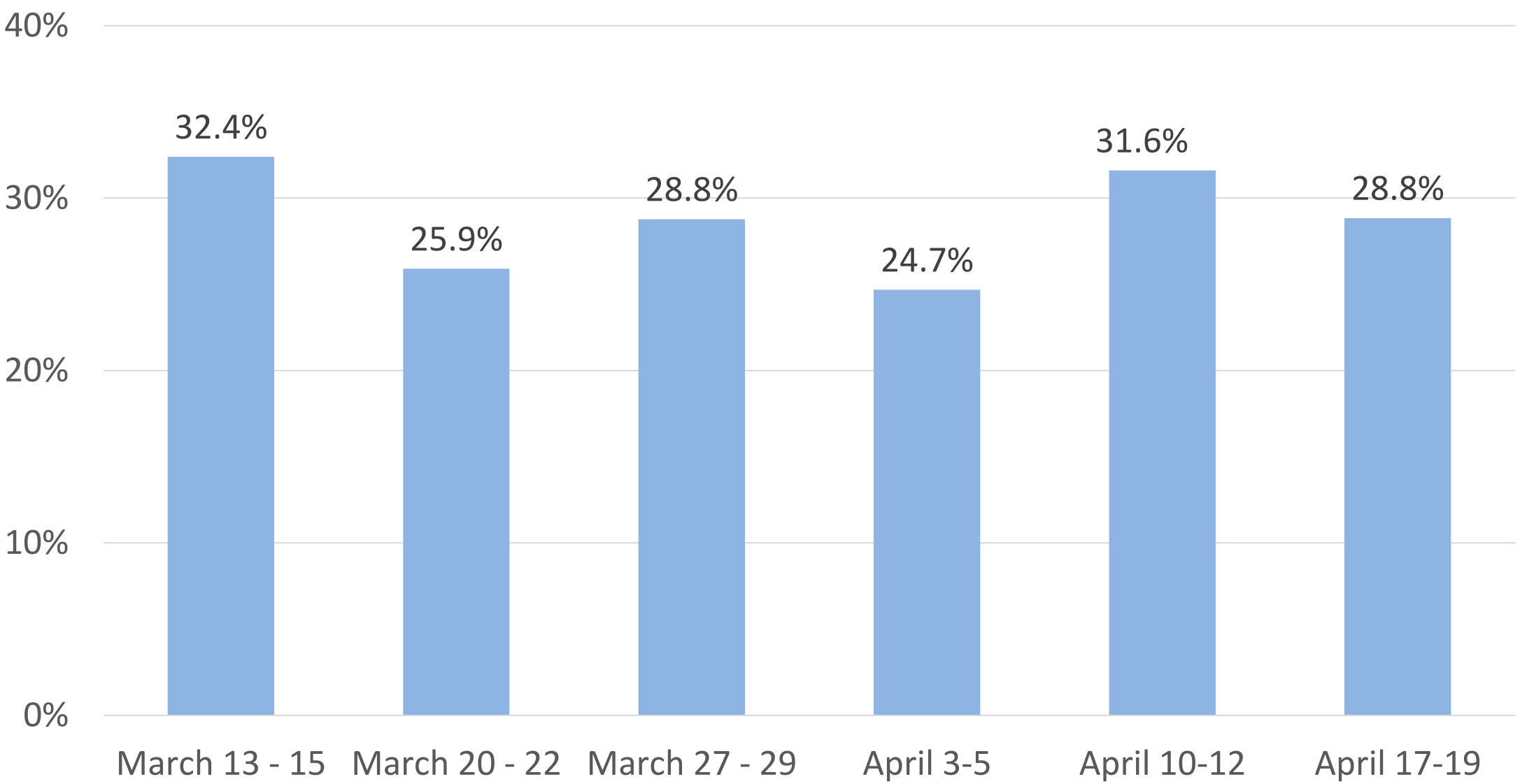
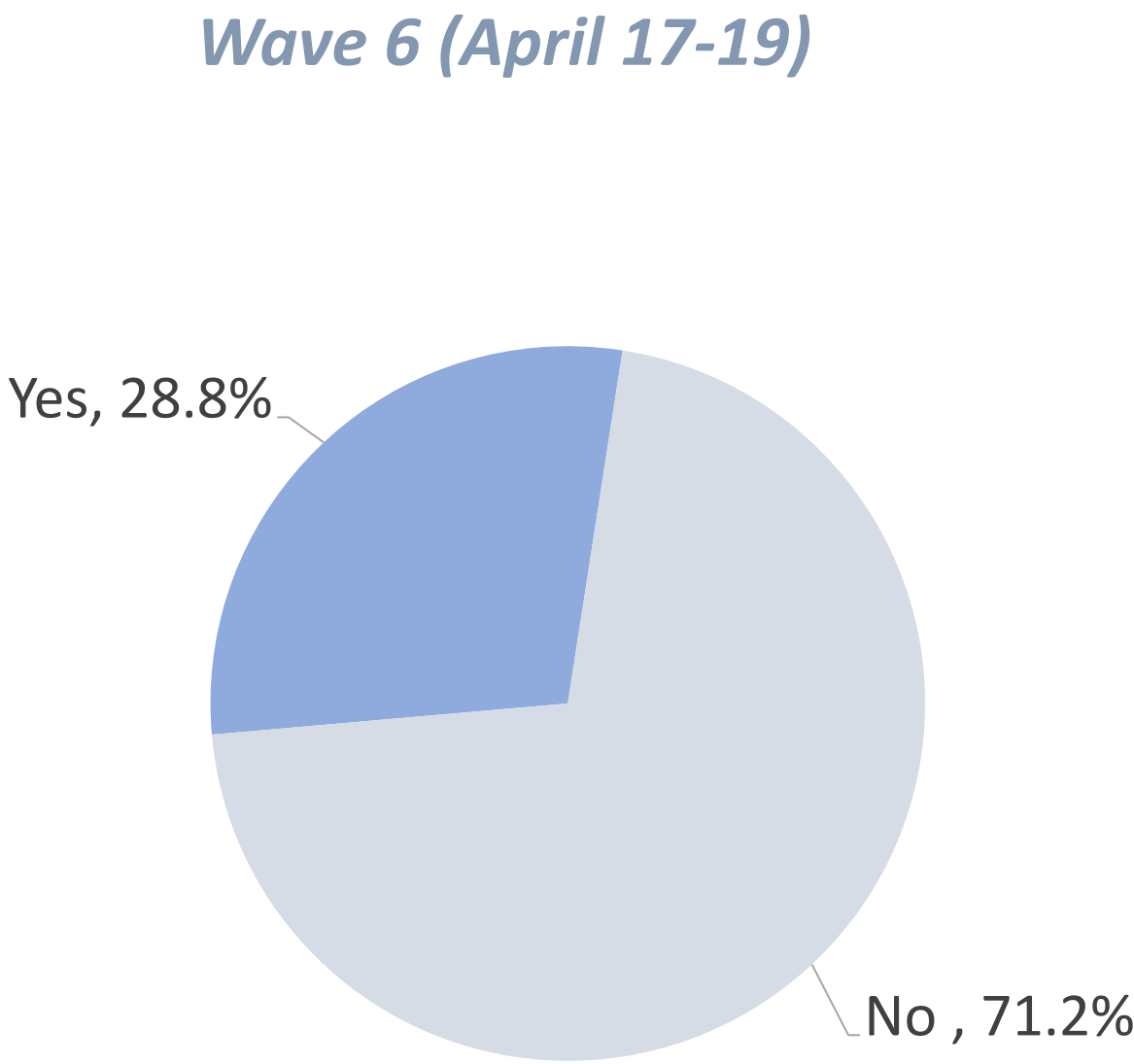
The proportion of travelers being fully refunded for cancelled trips continues to climb slowly. This week, 68.0 percent report receiving full refunds, compared to 66.0 percent last week.



Were Postponed Trips Rescheduled?

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

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

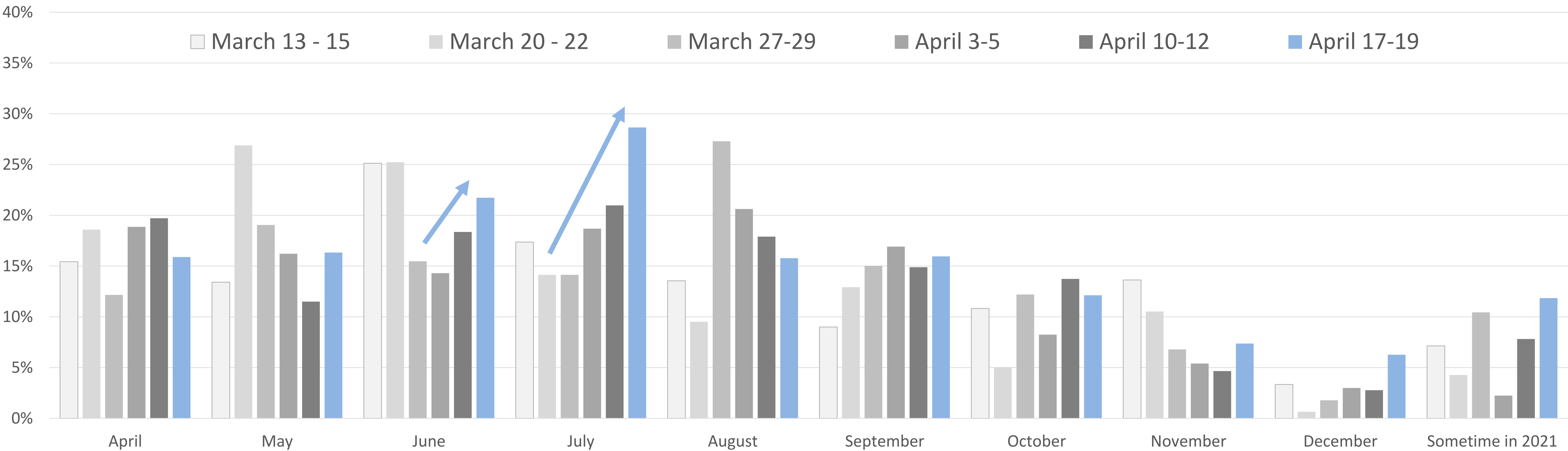


(Base: Postponing trips, 277, 354, 404, 433, 438 and 436 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Month Postponed Trips Rescheduled

Postponements are appearing to be spread across the summer months. Increasing numbers of trips are being postponed until June and July.

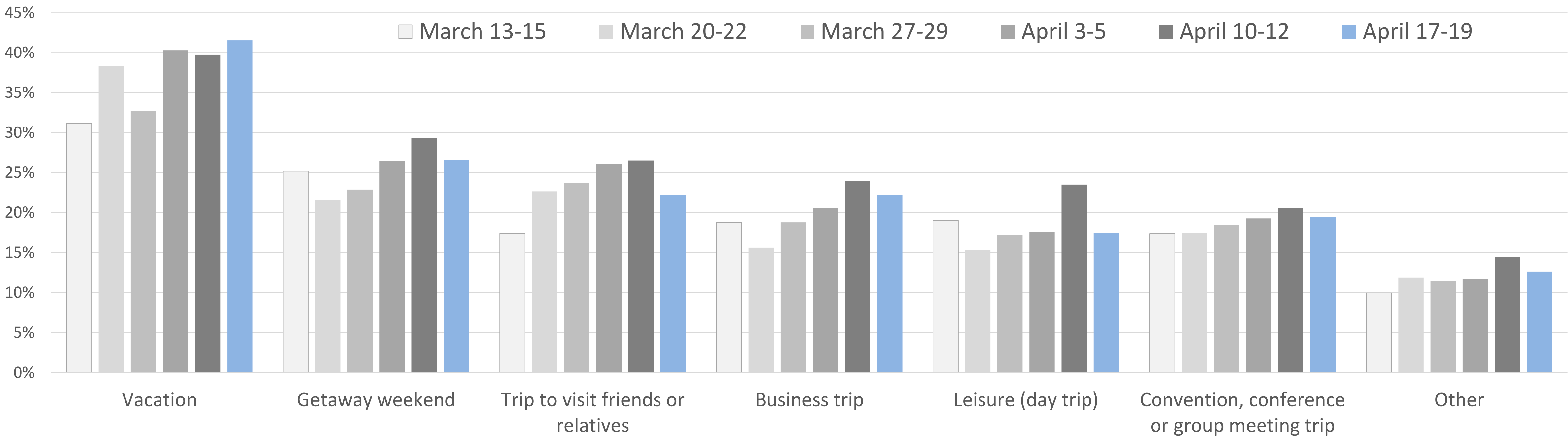
Question: The trip(s) you postponed were rescheduled to take place in which month(s)? (Select all that apply)



Types of Trips Cancelled

Over the course of the month, we have seen a decrease in the proportion of travelers cancelling weekend getaways and trips to visit friends and family.

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

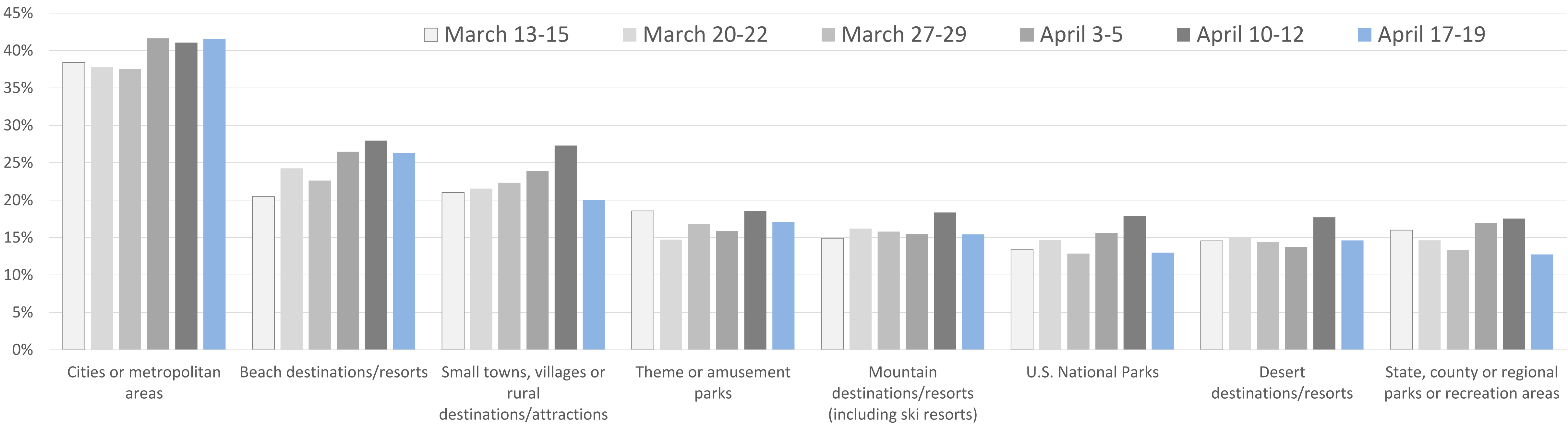


(Base: Cancelling trips, 292, 477, 506, 580, 624, and 643 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19 2020)

Types of Destinations Cancelled

Again, in this wave there were no major changes in the types of destinations being cancelled. However, unlike last week, it appears that beach destinations/resorts and small towns have seen decreases in cancellation activity.

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

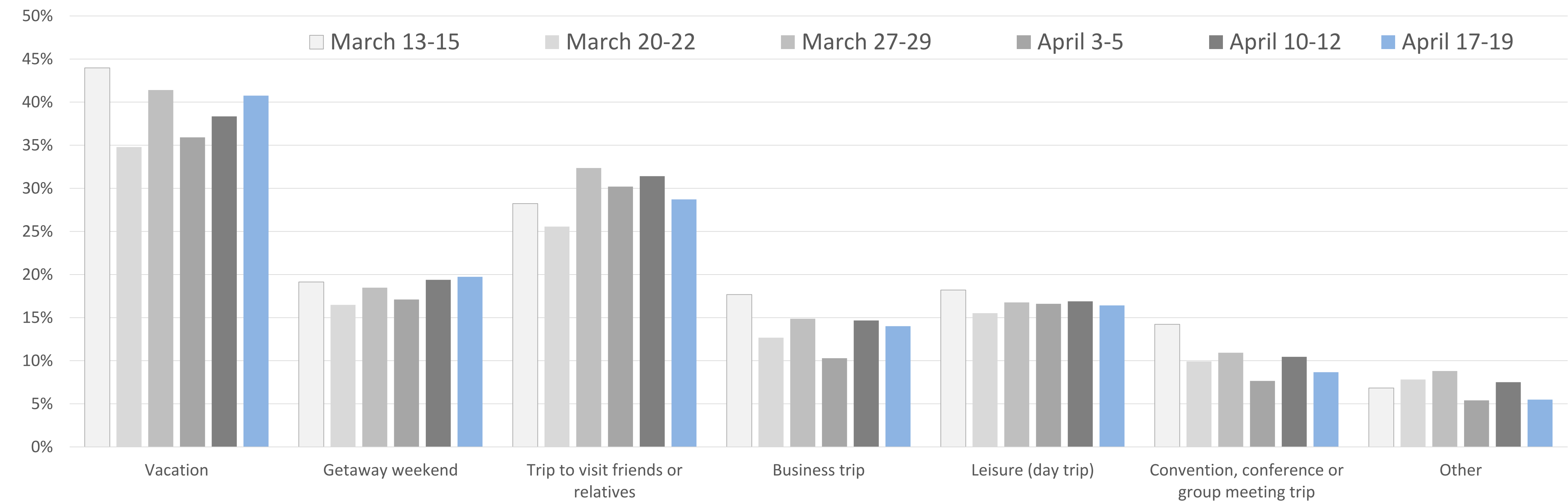


(Base: Cancelling trips, 292, 477, 506, 580, 624, and 643 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19 2020)

Types of Trips Postponed

Vacations are still the most postponed trip type.

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

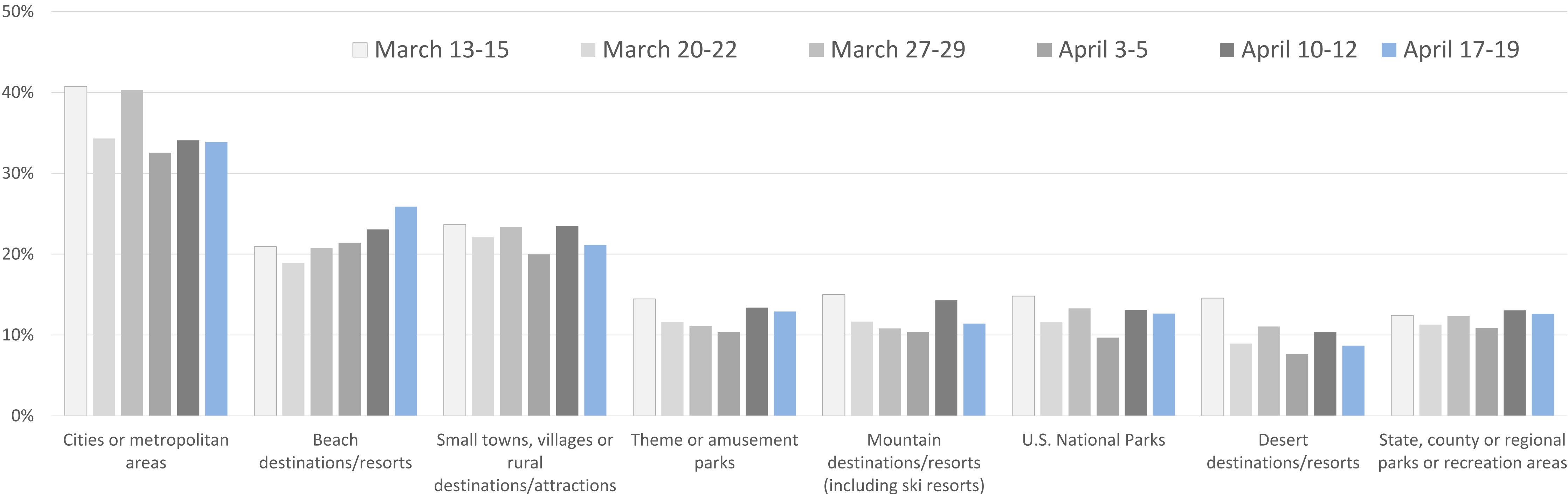


(Base: Postponing trips, 277, 354, 404, 433, 438 and 436 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Types of Destinations Postponed

Urban areas are still the most postponed destination type.

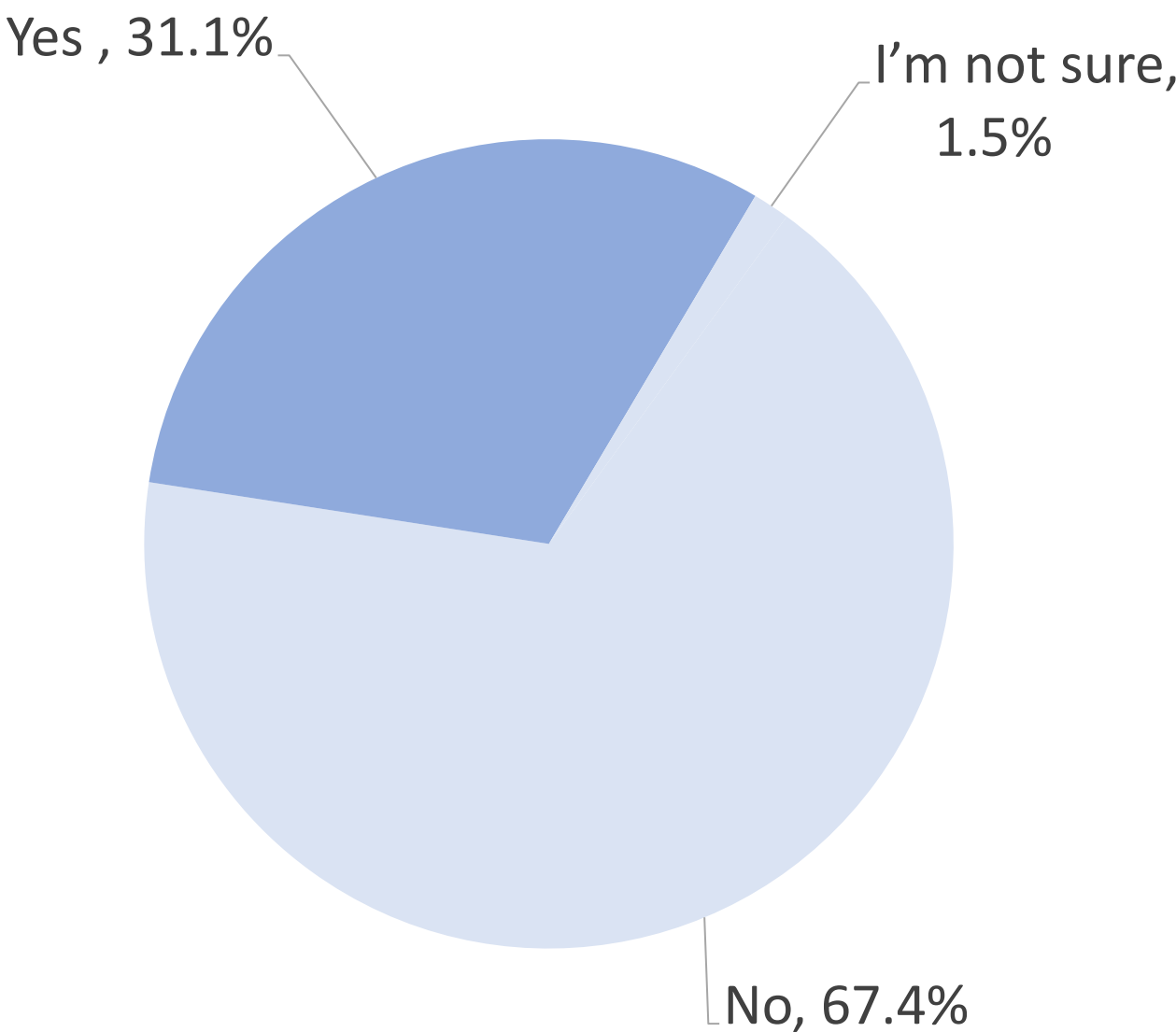
Question: Thinking about these postponed trips, which destination types were you planning to visit but ended up postponing?
(Select all that apply)



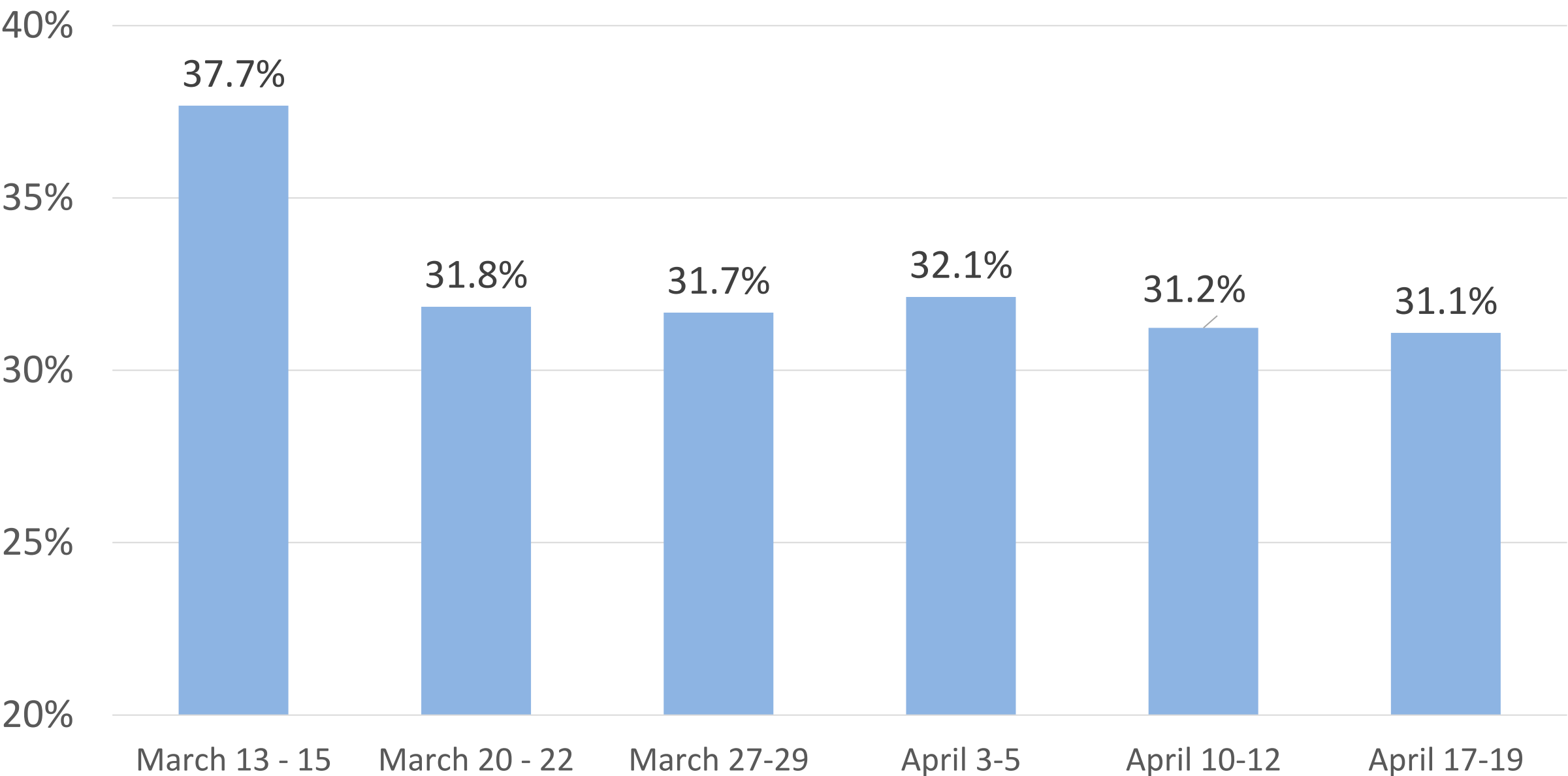
(Base: Postponing trips, 277, 354, 404, 433, 438 and 436 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

International Trips Postponed or Cancelled

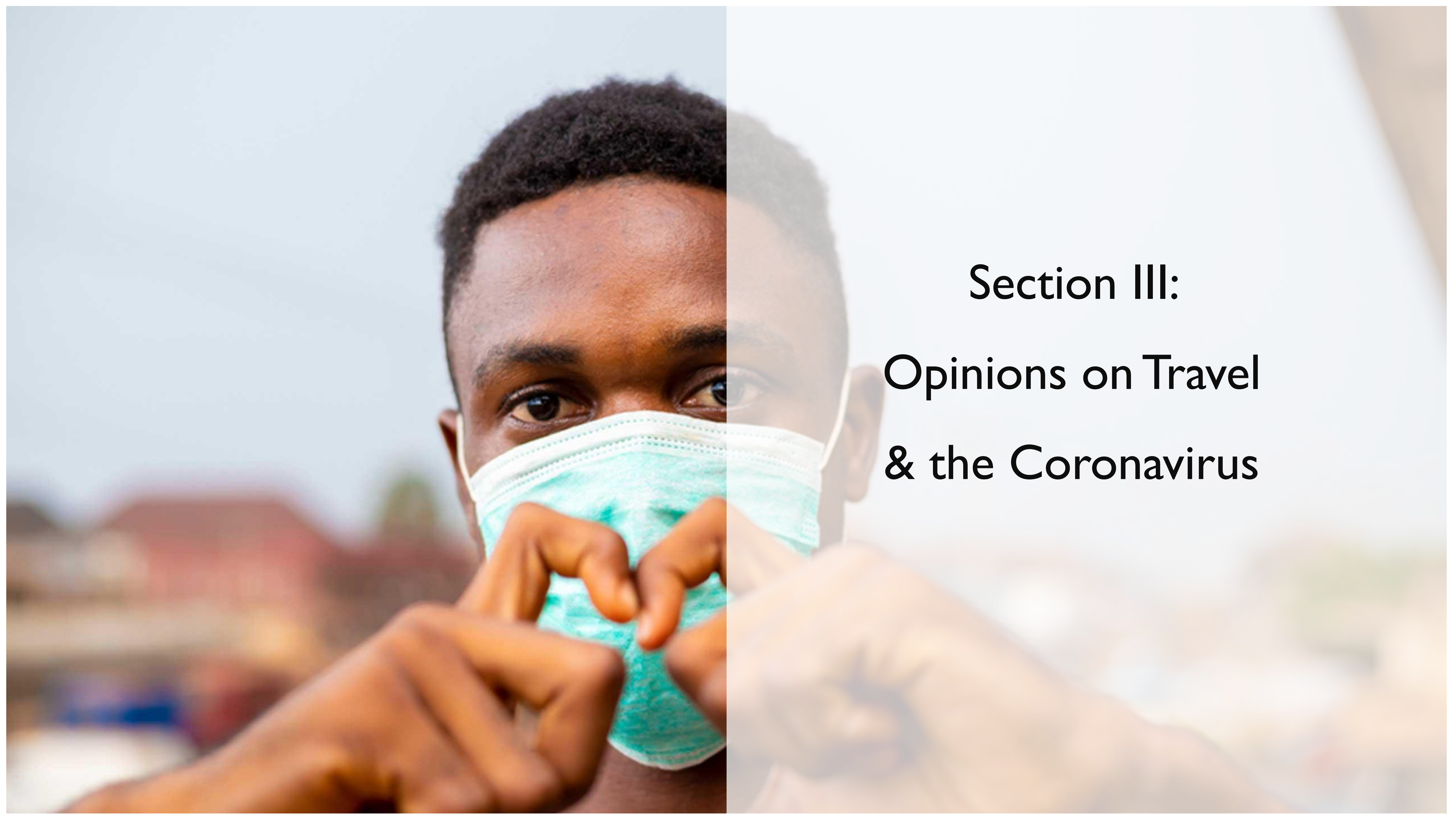
Question: Were any of the trips you canceled or postponed foreign trips (i.e., travel to countries outside the United States)?



Almost one-third (31.1%) of those postponing or cancelling a trip did so for a trip to a foreign country. This figure has remained stable over the past five survey waves.



(Base: Wave 6. Respondents cancelling or postponing a trip, 929 completed surveys. Data collected April 17-19, 2020)



Section III: Opinions on Travel & the Coronavirus

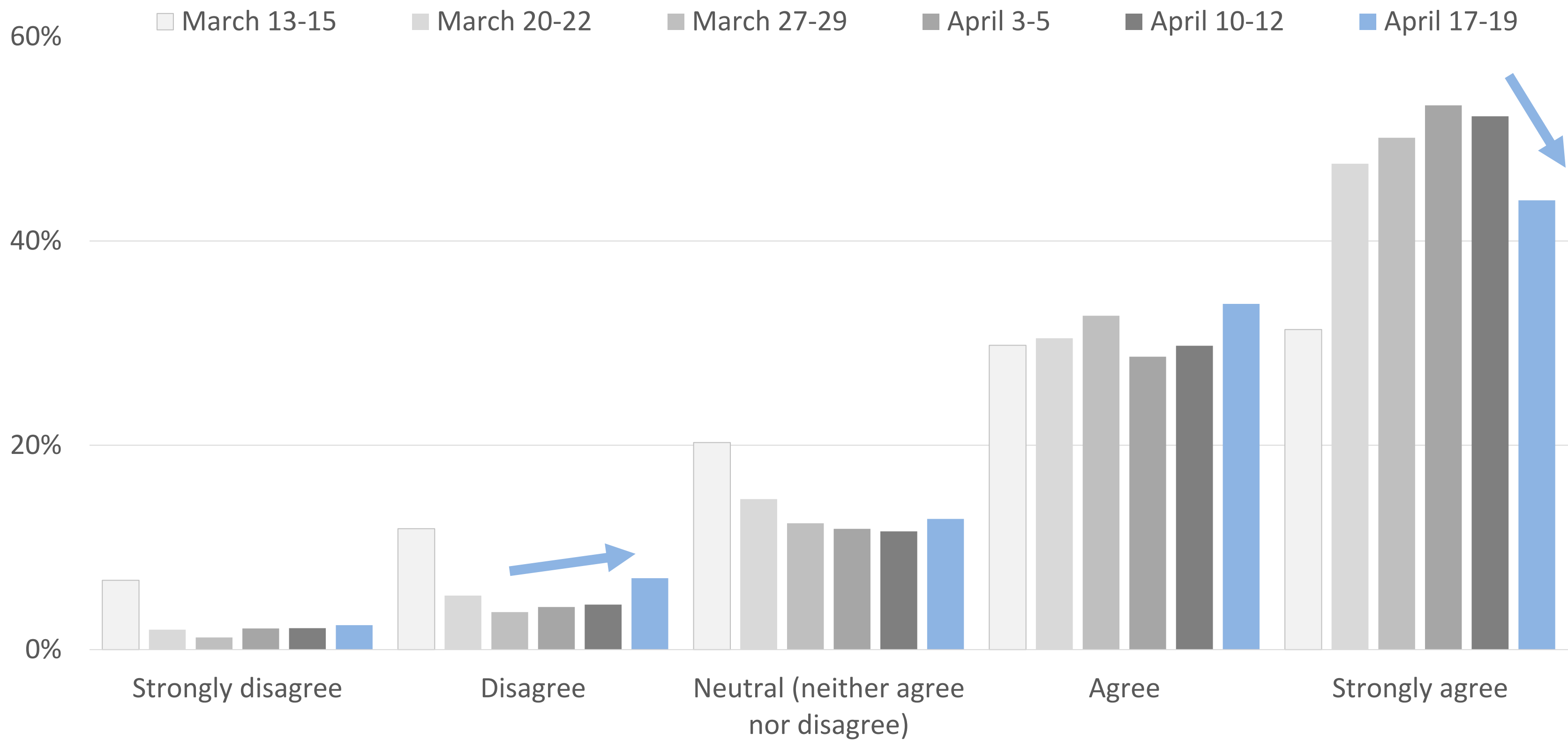
Avoiding Travel Until the Crisis Blows Over

While nearly 8-in-10 American travelers say they are done traveling until the coronavirus situation blows over, this sentiment has decreased for the first time in six weeks. Last week more than half (52.2%) strongly agreed with this sentiment, which has dropped this week to 44.0 percent.

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



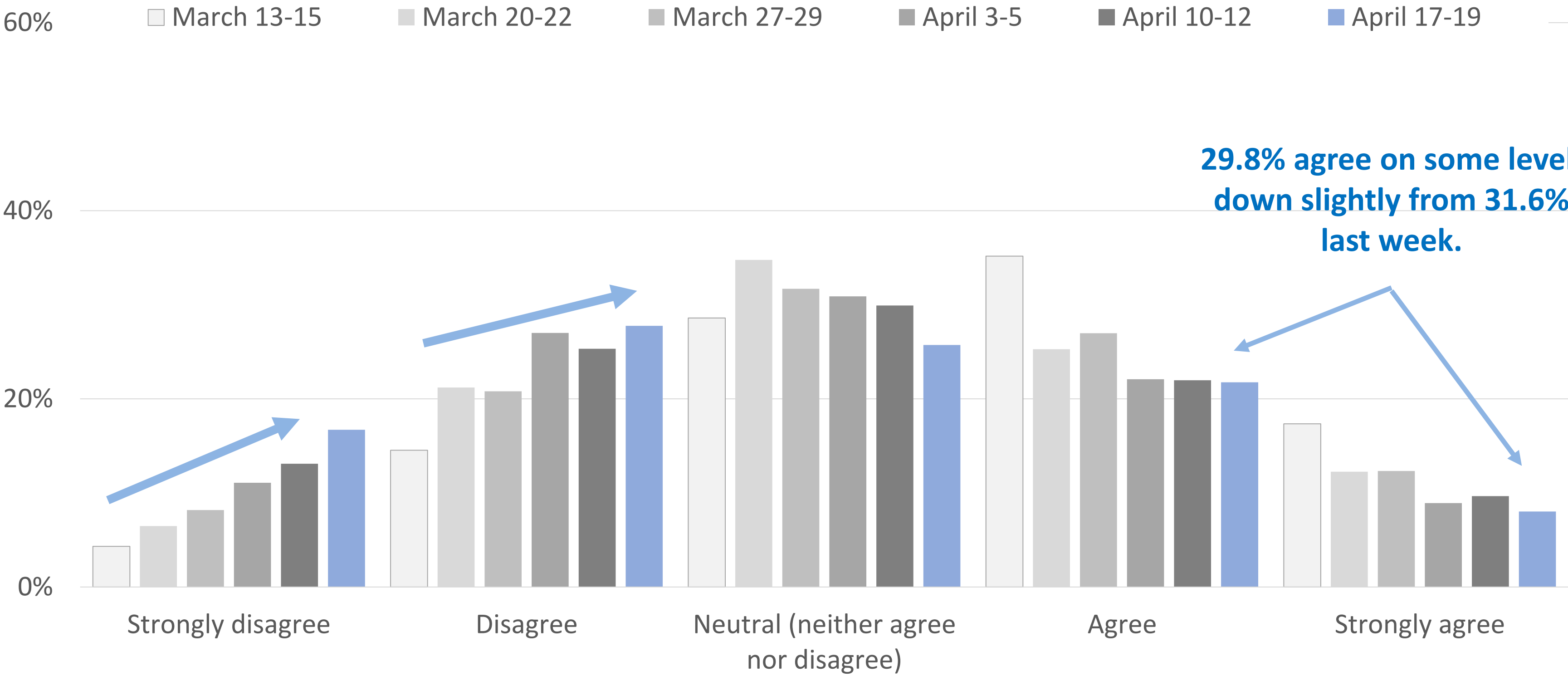
Expectations for Summer Travel Season

Now more travelers disagree the coronavirus situation will be resolved by the summer travel season. In total, 44.5 percent of Americans disagree that the coronavirus situation will be resolved before summer. In contrast, 29.8 percent agree.

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



Expectations for Fall Travel Season

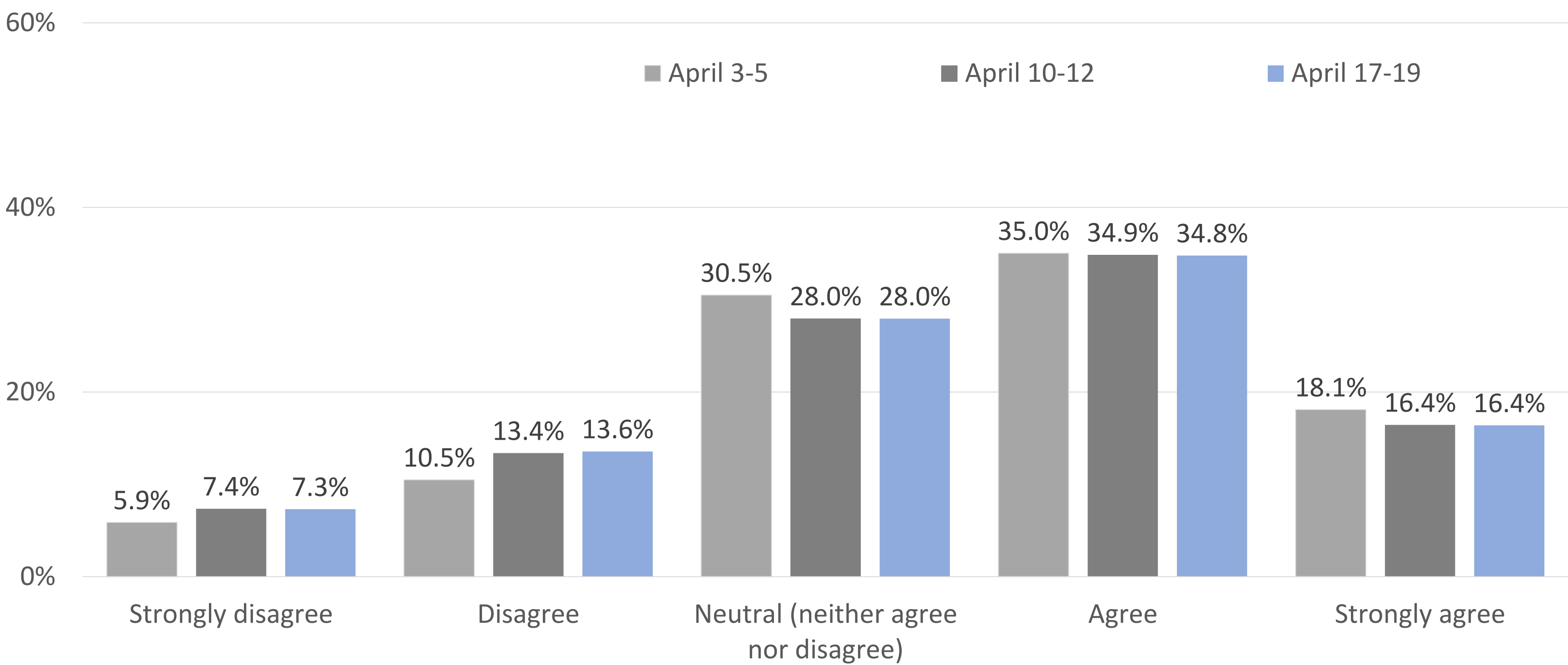
About one-half of American travelers (51.2%) expect to be back traveling this Fall. This sentiment is unchanged from last week (51.3%).

Question Added in Wave 4

How much do you agree with the following statement?

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

(Base: All respondents, 1,216, 1,263, 1238 completed surveys. Data collected April 3-5, 10-12 and 17-19, 2020)



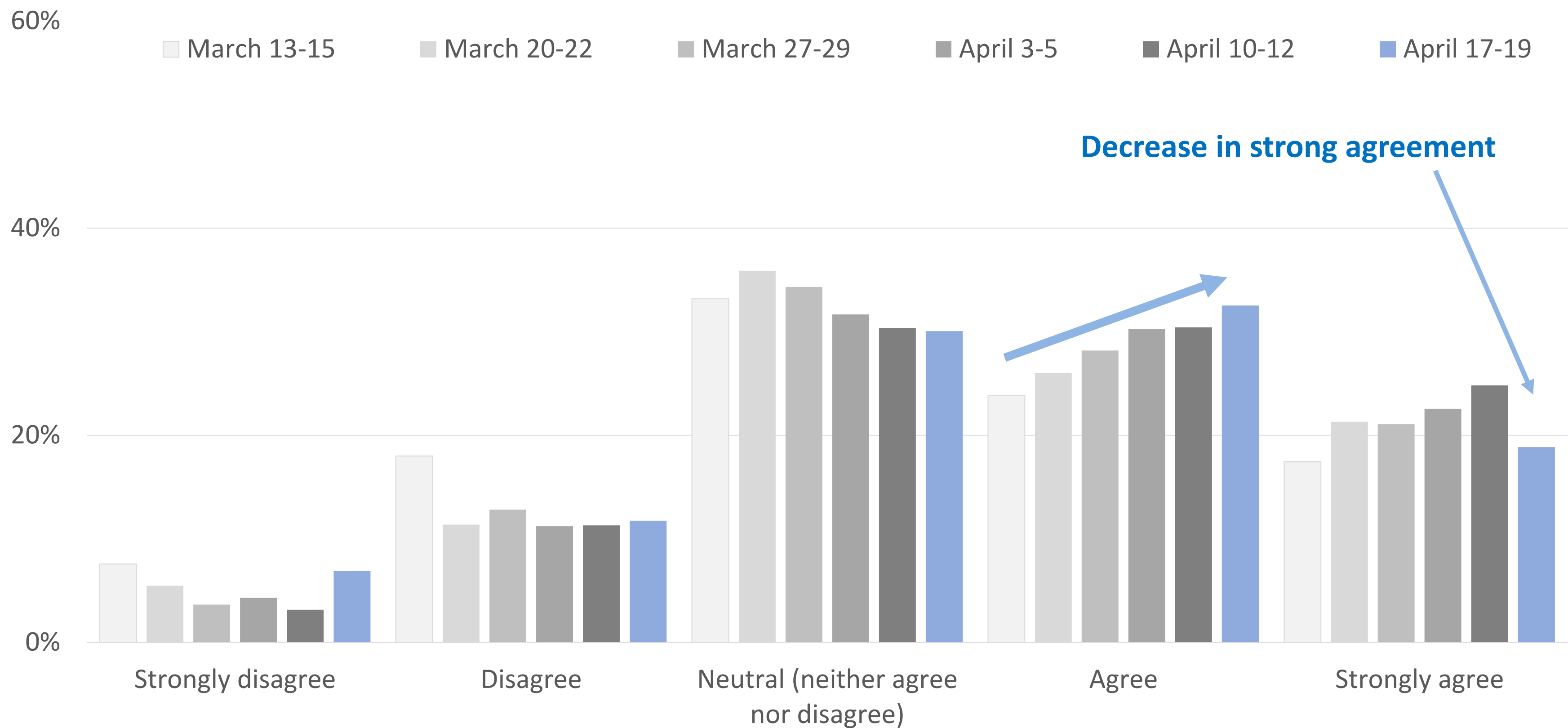
Staycations as a Replacement for Vacations

While half of American travelers agree that staycations may end up replacing vacations this summer, this sentiment has decreased for the first time in six weeks. The percent of American travelers agreeing with this sentiment has decreased slightly from 55.2 percent last week to 51.3 percent in the most recent wave.

How much do you agree with the following statement?

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

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



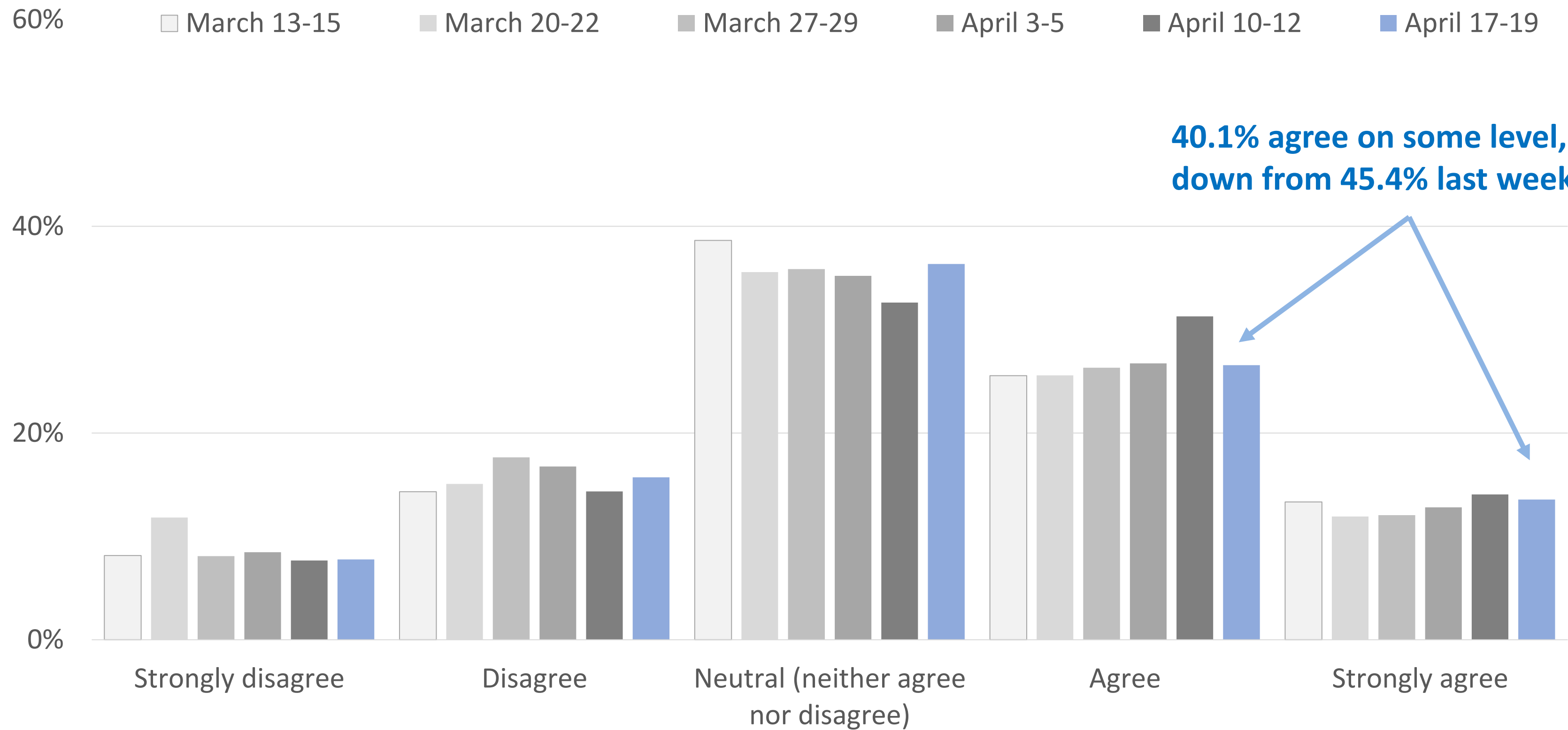
Replacing Air Travel With Road Trips

Car travel may still displace some air travel this year, with 40.1 percent of American travelers saying they may avoid airlines and instead travel by car. This decreased from 45.4 percent last week.

How much do you agree with the following statement?

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

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



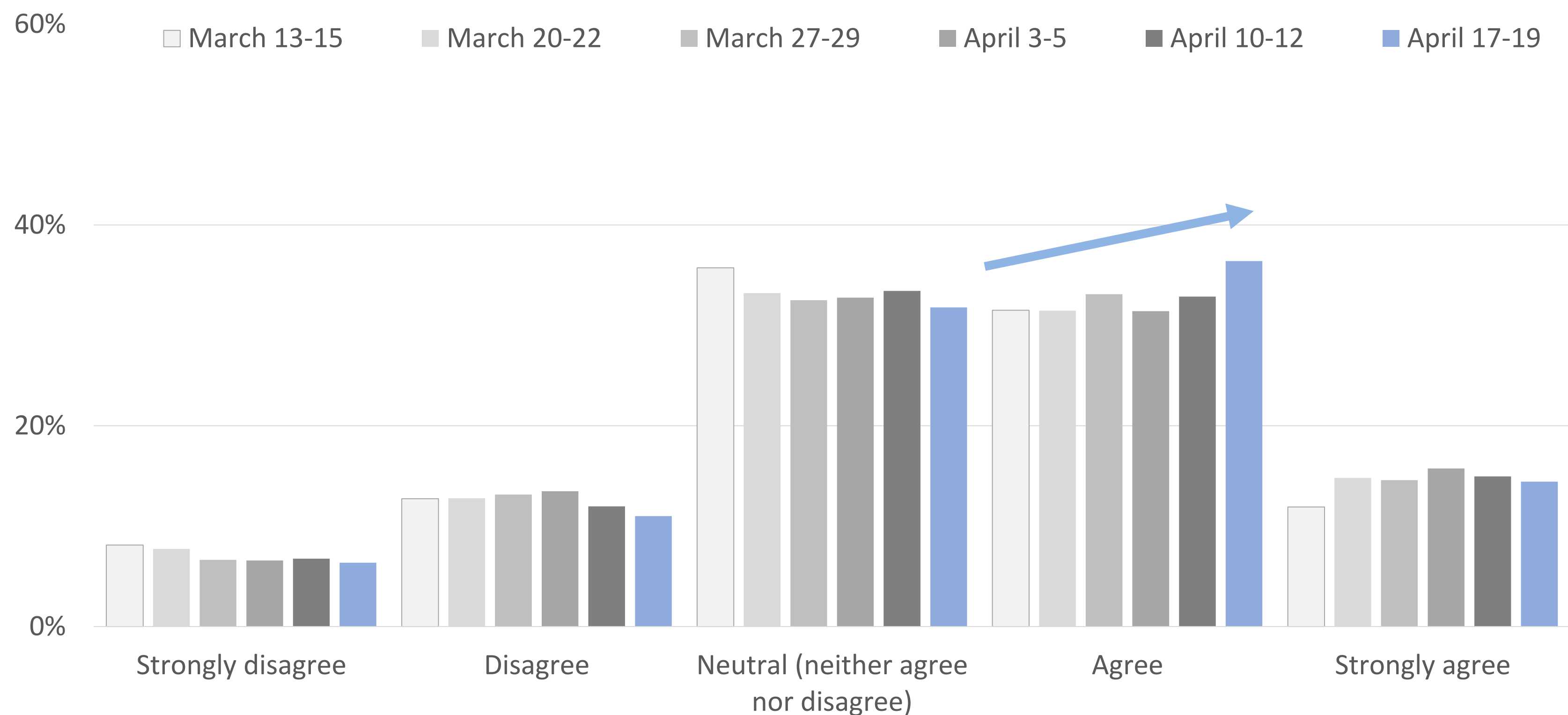
Replacing Long-Haul Travel with Regional Trips

While the sentiment about replacing air travel with road travel has decreased slightly, agreement about taking more regional trips due to the coronavirus has increased. This week 50.8 percent said they'll probably take more regional trips while avoiding long-haul trips (up from 47.8% last week).

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



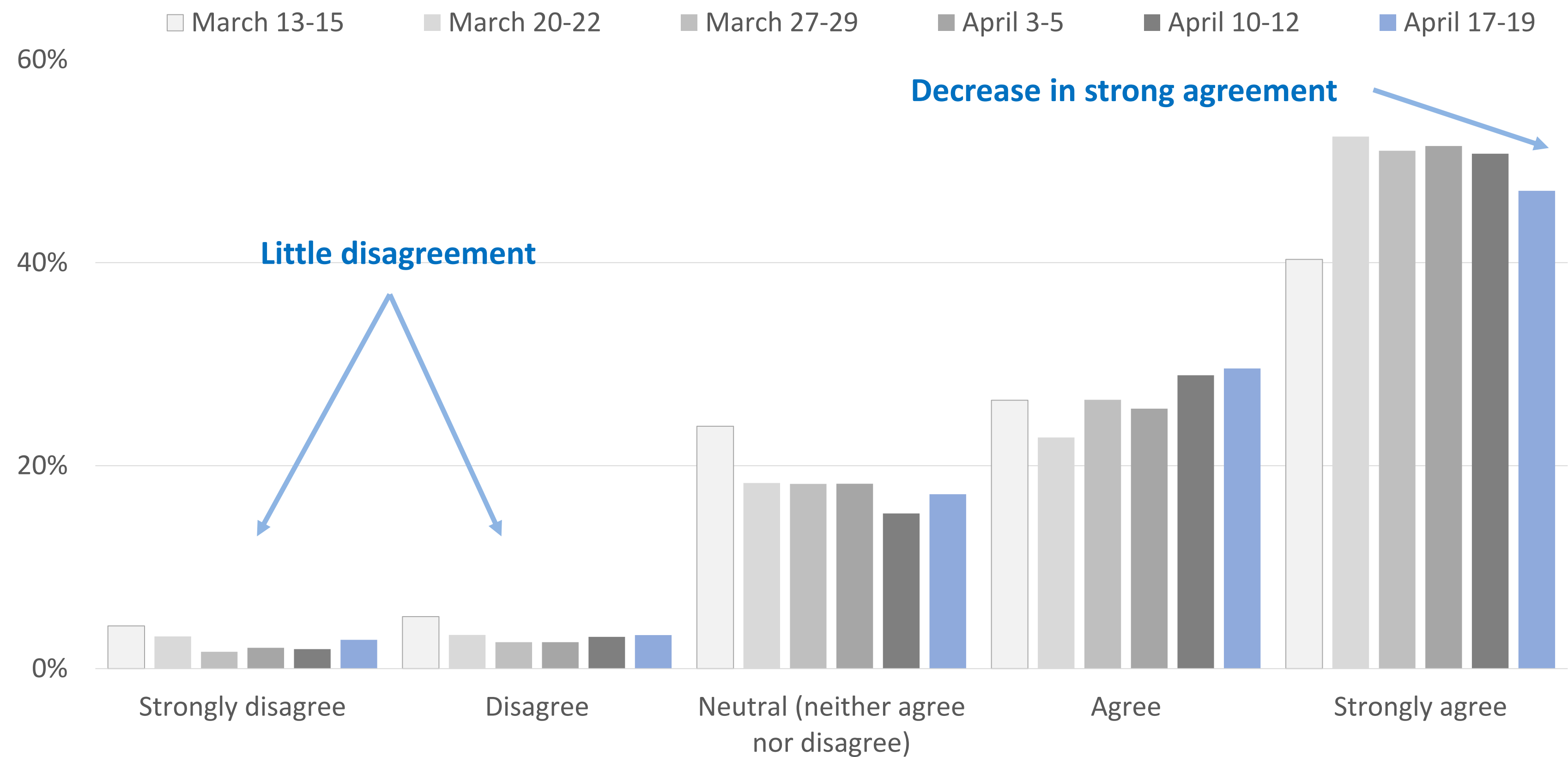
Avoiding Conventions & Conferences

Trust that attending meetings in the current environment remains low. Three-quarters of travelers (76.7%) say they will be unlikely to attend these events until the coronavirus situation is over. However, strong agreement with this sentiment has declined slightly this week.

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



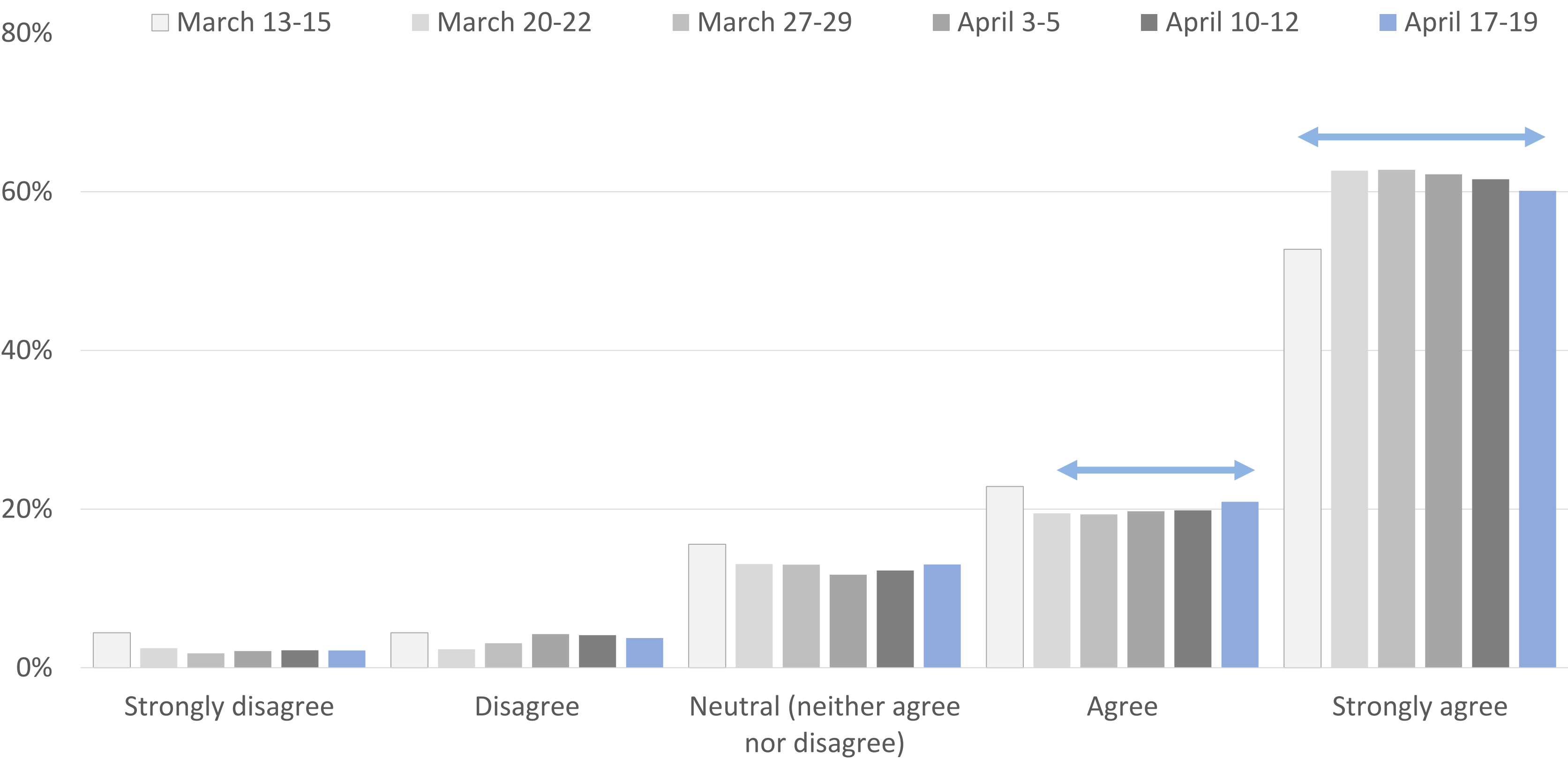
Avoiding International Travel

Unchanged in the last five weeks, 4-in-5 American travelers (81.0%) said they’re unlikely to travel outside the U.S. until the coronavirus situation is resolved.

How much do you agree with the following statement?

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

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



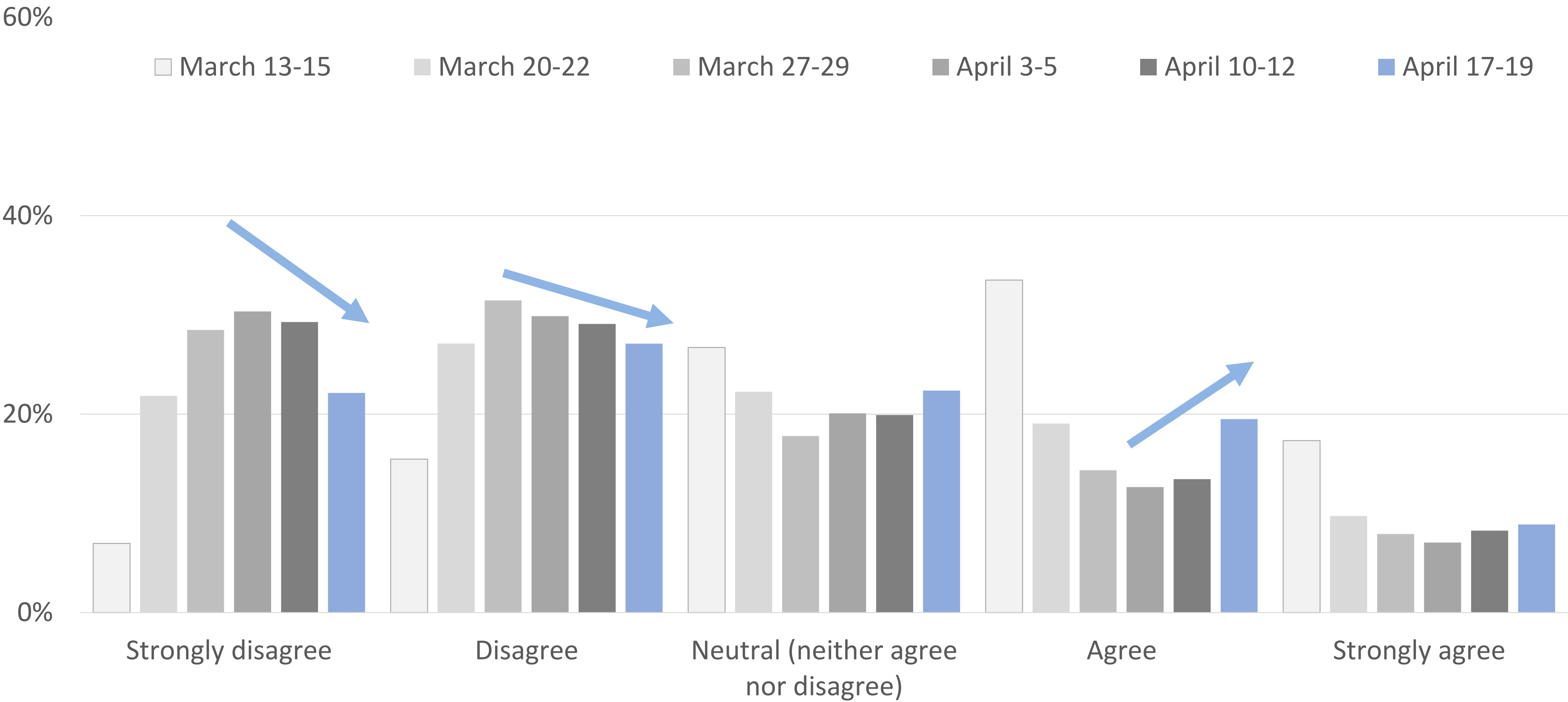
Comfort Enjoying Home Community

American travelers remain mostly uncomfortable about going out in their own communities to enjoy themselves. However, this week it appears that Americans are starting to feel more comfortable about going out in their communities (28.4%—up from 21.7% 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 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)



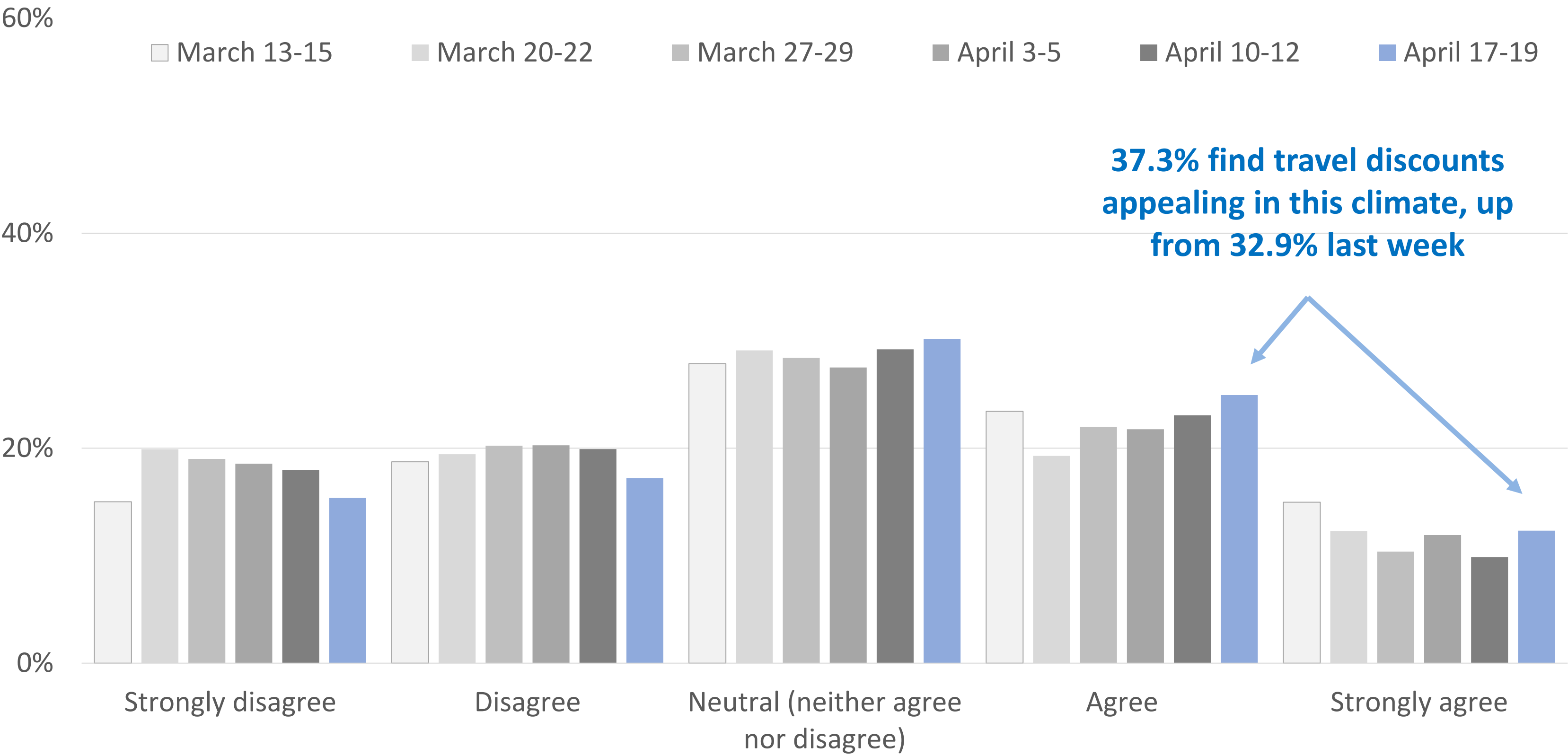
Discounts and Price Cuts

Price cuts now resonate with over 1-in-3 American travelers. When asked if price cutting made traveling in the next three months more interesting, 37.3 percent now agree, up notably from last week (32.9%).

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



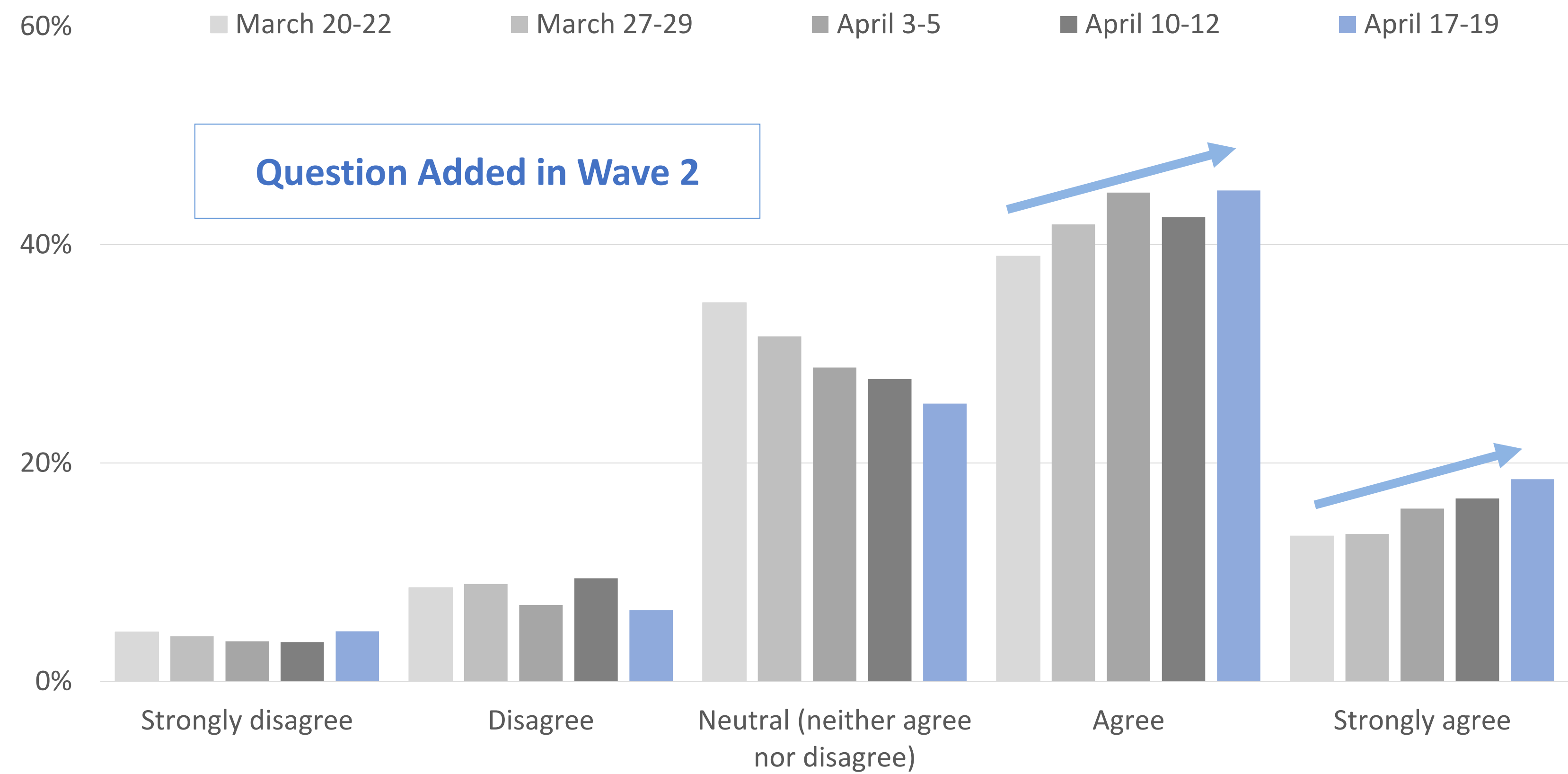
Supporting Local Businesses

In total, 63.5 percent of American travelers now say they have been taking action to try to support local businesses where they live.

How much do you agree with the following statement?

Statement: I have been taking action to try to support local businesses where I live.

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



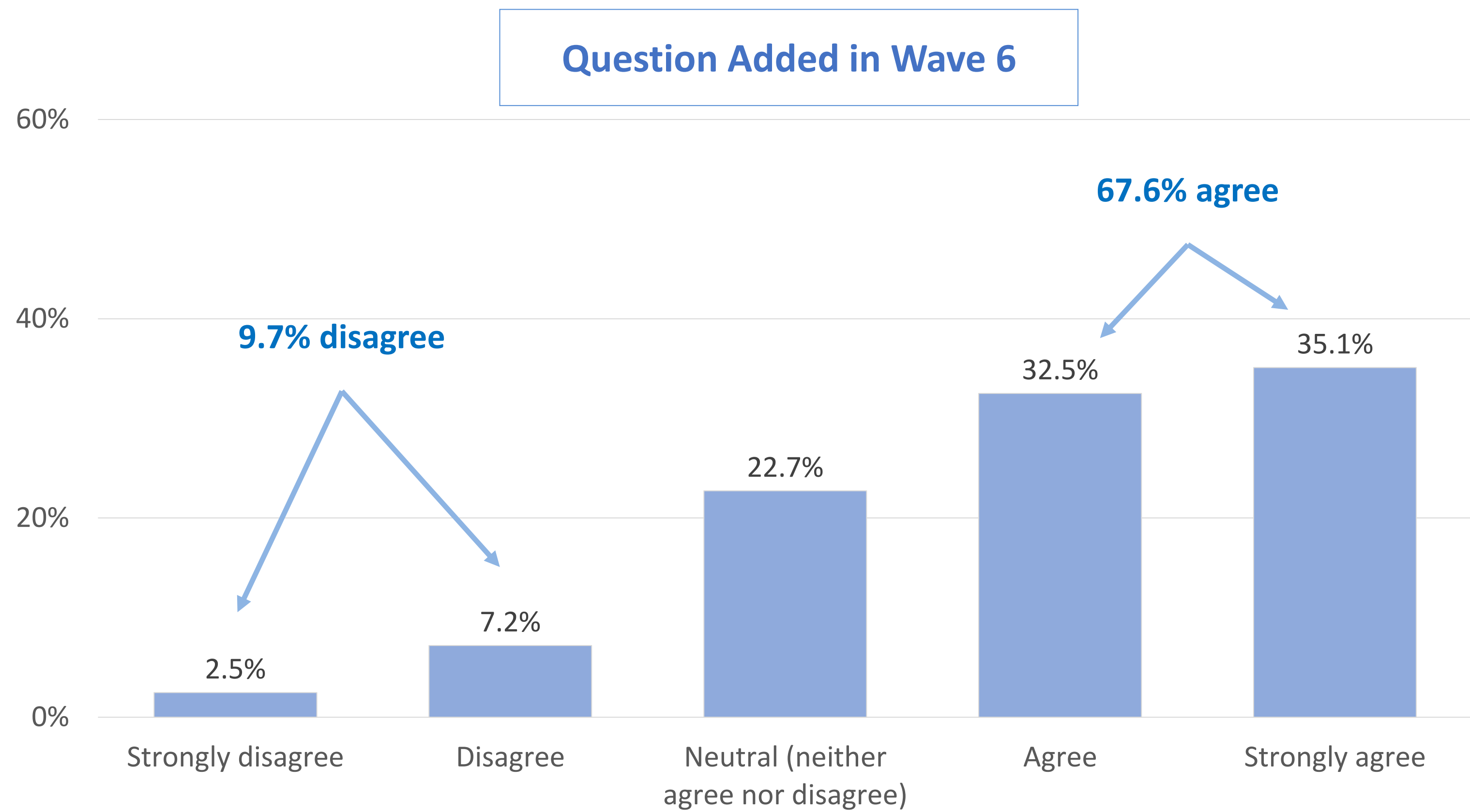
Travelers in Community are Unwanted

Two-thirds of American travelers agree that they do not want travelers coming to visit their community in the current environment (67.6%). Only one-in-ten disagree with this sentiment.

How much do you agree with the following statement?

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

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



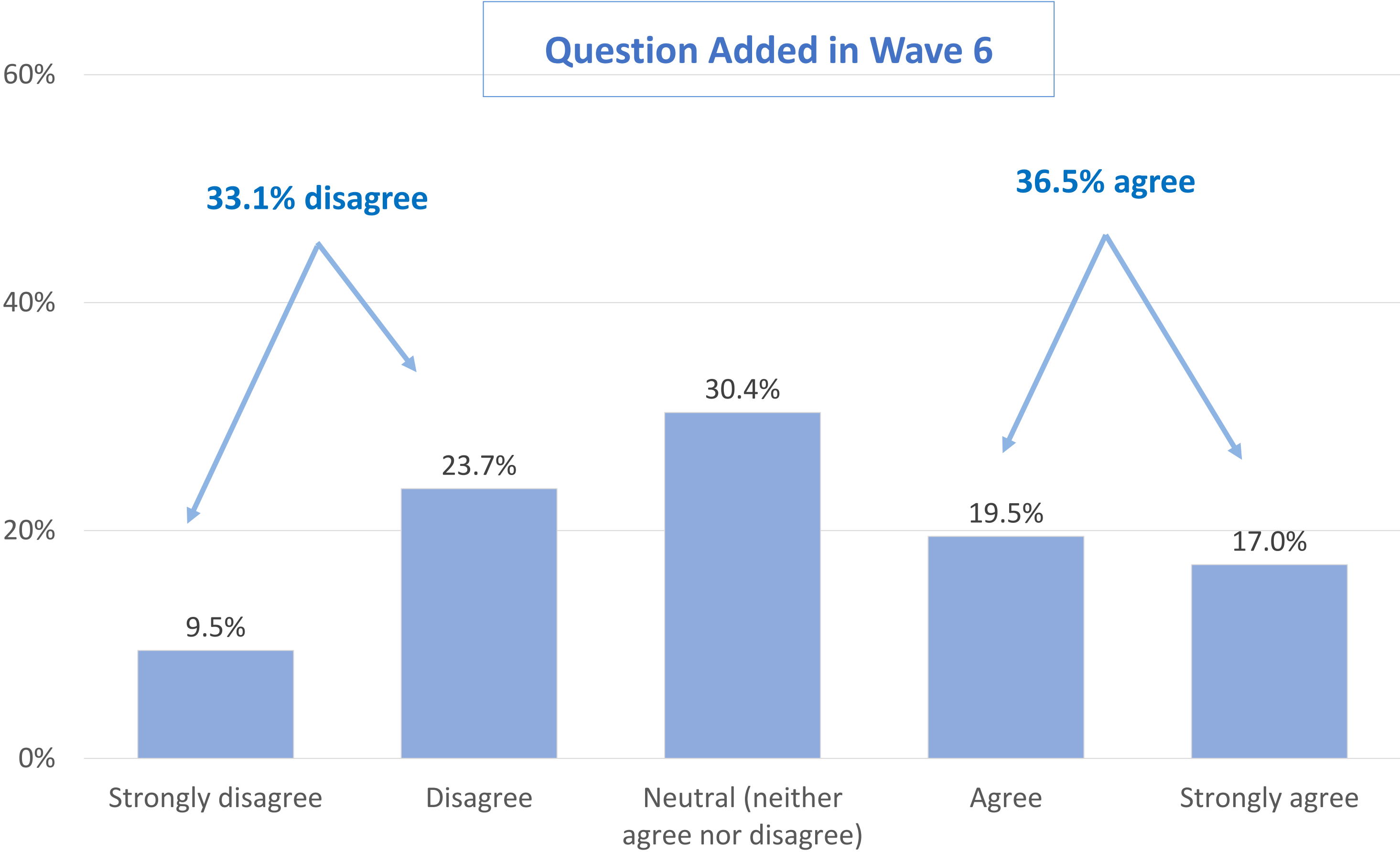
Won't Travel Without Vaccine

One-third of American travelers agree that they will not be traveling until a vaccine for Covid-19 is developed (36.5%). A similar proportion of travelers (33.1%), however, currently reject this idea.

How much do you agree with the following statement?

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

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

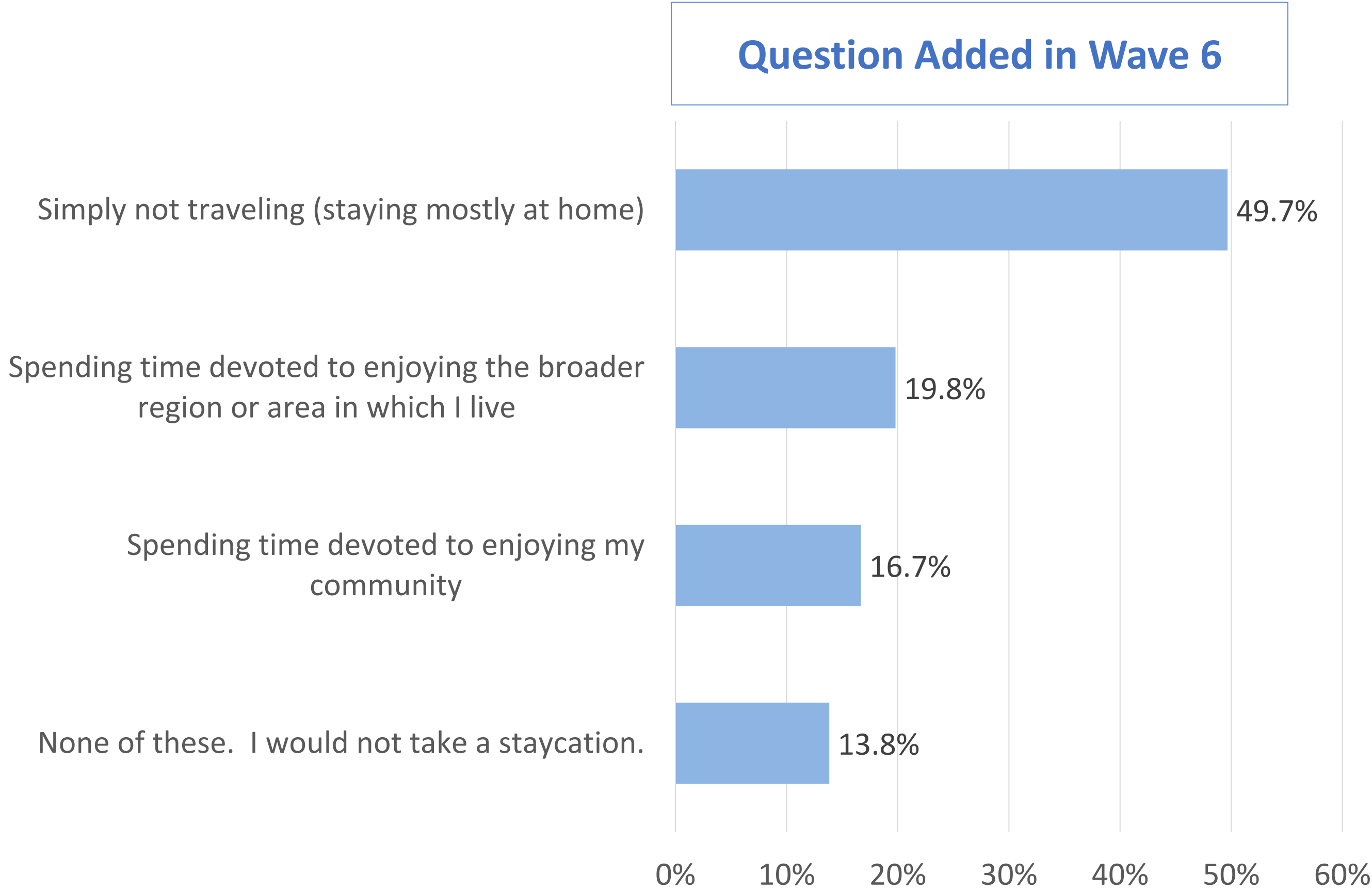


Travelers’ Definition of a Staycation

When thinking of taking a staycation this summer, half of American travelers consider it to be “staying mostly at home” (49.7%). Meanwhile, one-in-five define this as “spending time devoted to enjoying the broader region in which they live” (19.8%).

Question: Which best describes the type of staycation you would be most likely to take this summer? (Select one to complete the sentence below)
For me, a staycation would be

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

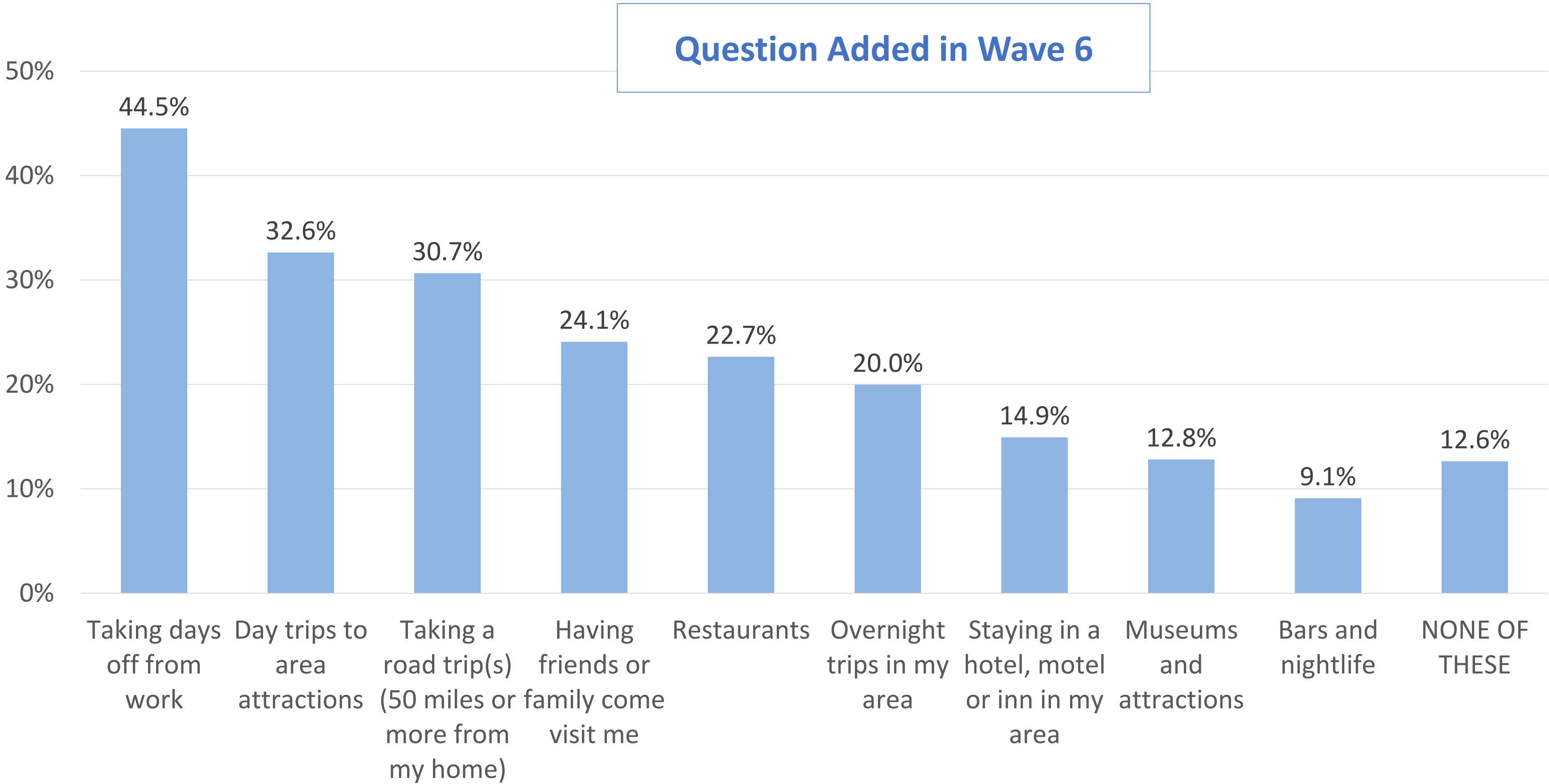


Staycation Activities

The top staycation activity American travelers will most likely engage in this summer will be taking time off work. Nearly a third also say they are likely to take day trips to area attractions (32.6%) and/or take road trips that are 50-miles or more away from their home (30.7%).

Question: If you were to take a staycation this summer, which of the following would it most likely include? (Select all that apply)

(Base: Wave 6. Respondents who would take a staycation this summer, 1,066 completed surveys. Data collected April 17-19, 2020)

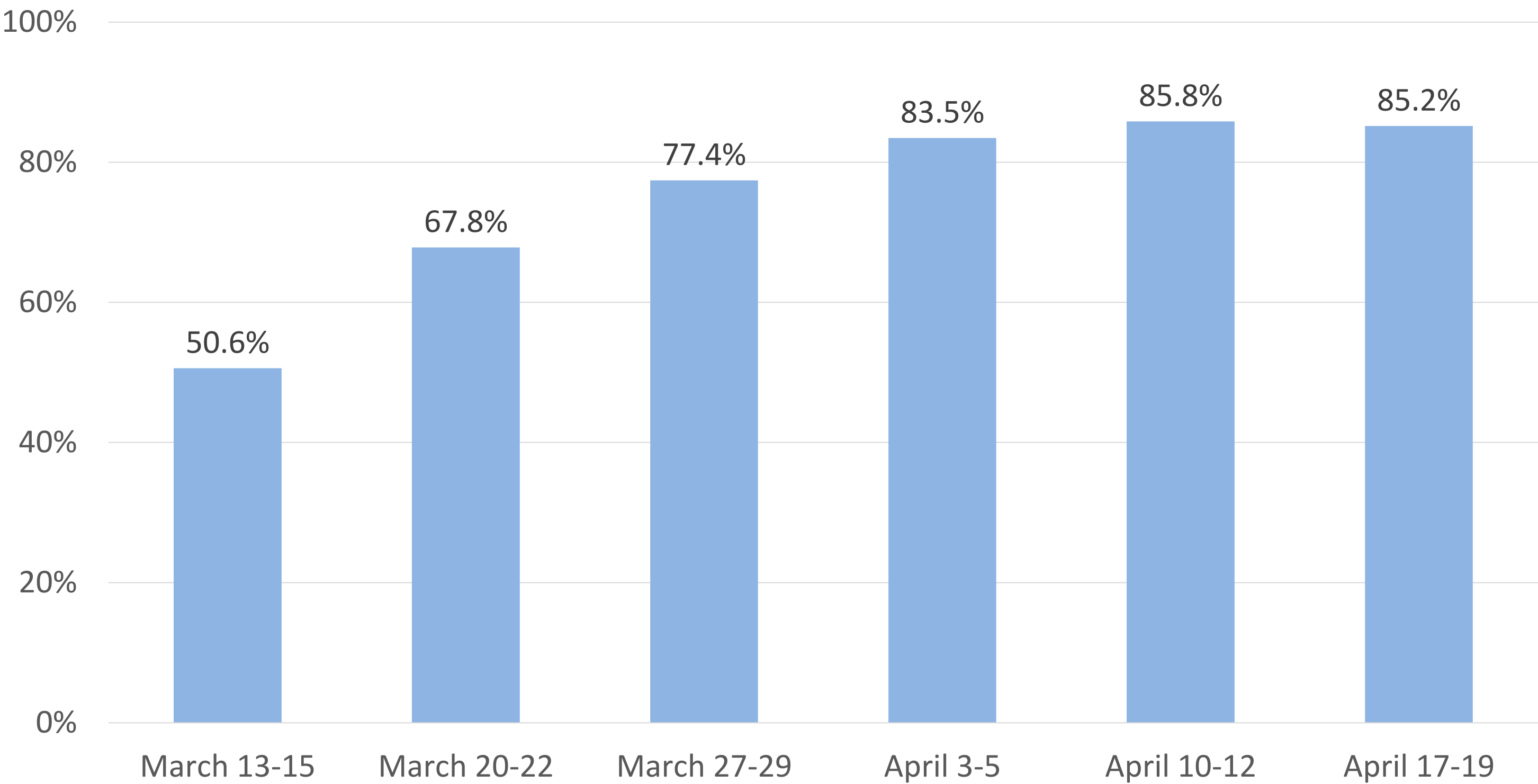


Lives in a Place with Reported Cases of Coronavirus

Nearly nine-in-ten American travelers now report living in a community with known cases of the virus.

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

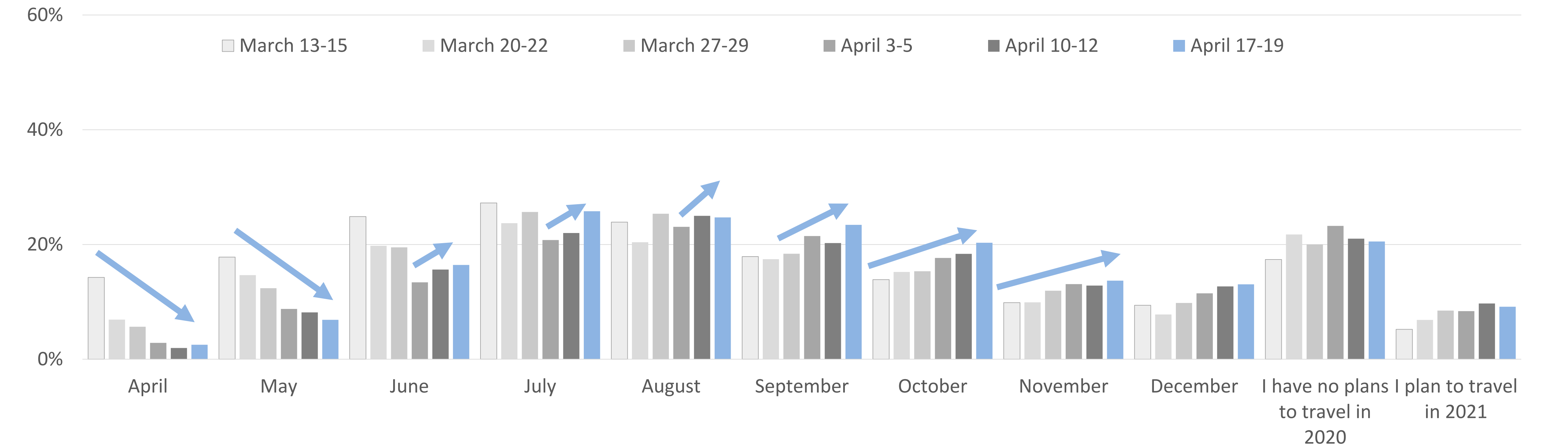
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)



Upcoming Travel Plans

While the scheduling of leisure trips in the next two months has dropped sharply, there appears to be some increases on the horizon for the summer and late fall months.

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



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

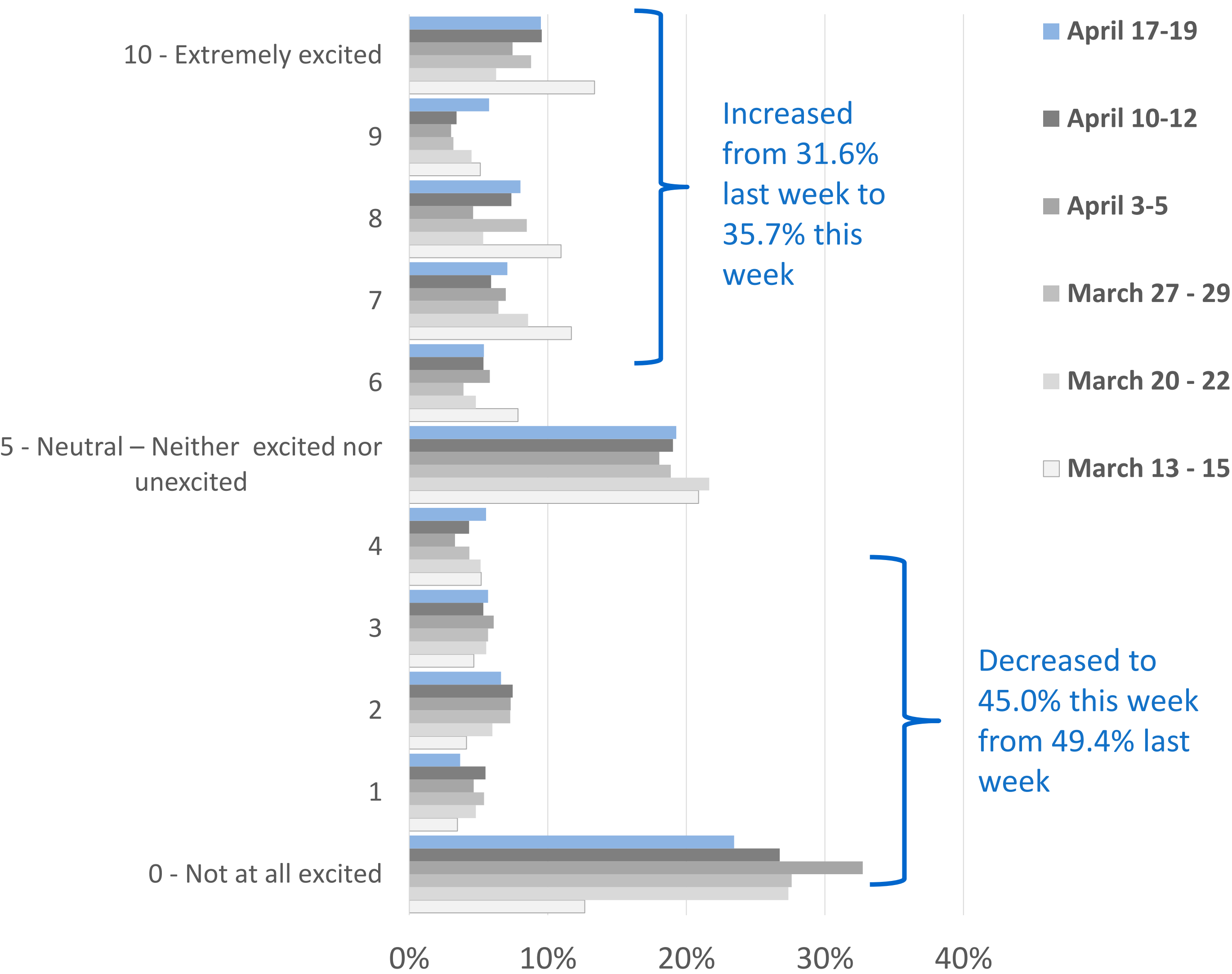
Excitement to Travel Now

Interest in even short trips rebounded slightly this week. Over a third of American travelers (35.7%) 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 from 31.6 percent last week.

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

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

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

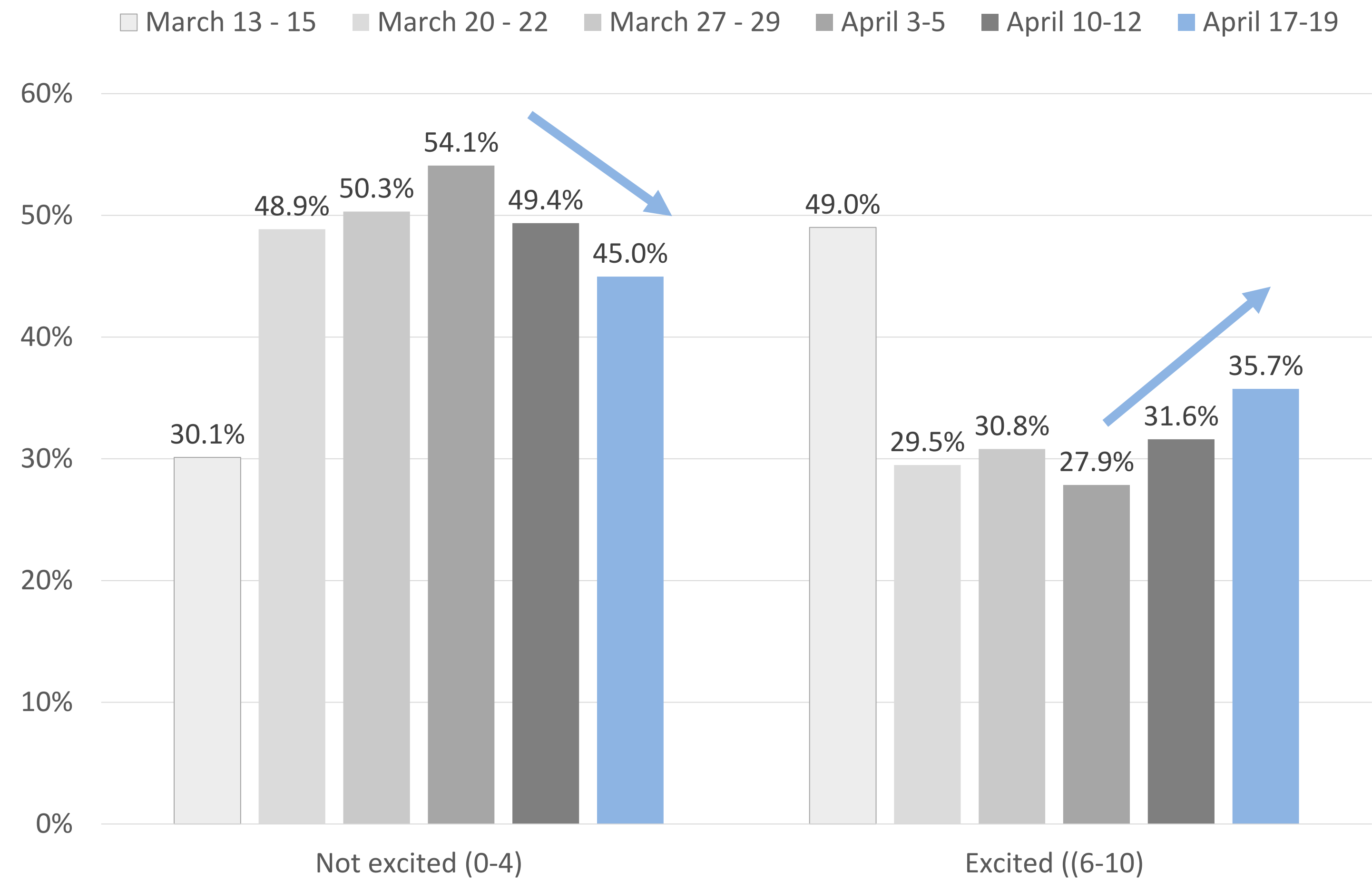


Excitement to Travel Now (Excited vs. Not Excited)

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

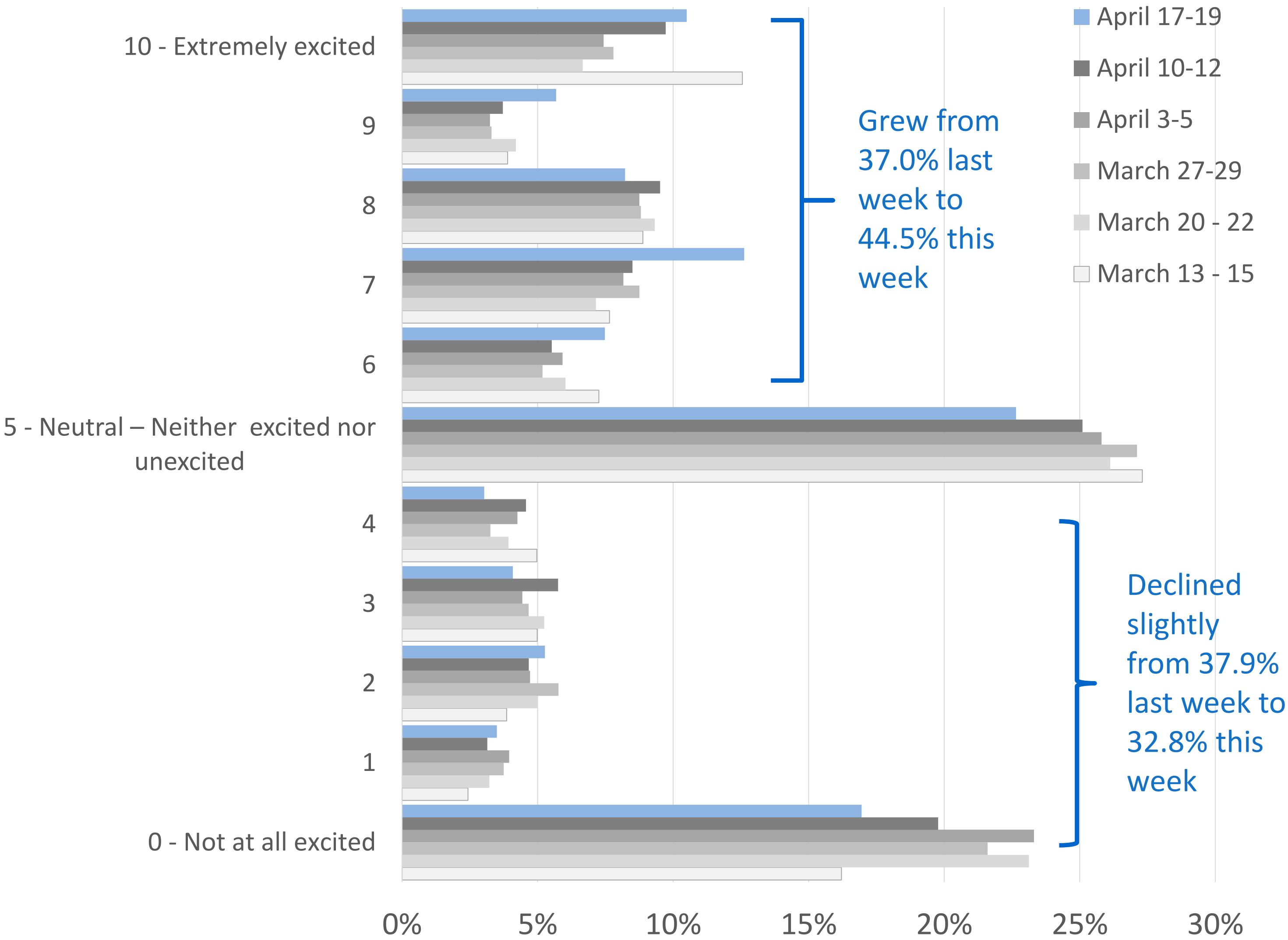


Openness to Travel Information

Travelers’ interest in learning about new travel experiences and destinations grew slightly this week. Now, over four-in-ten (44.5%) expressed high levels of excitement about the topic, up from 37.0 percent last week.

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

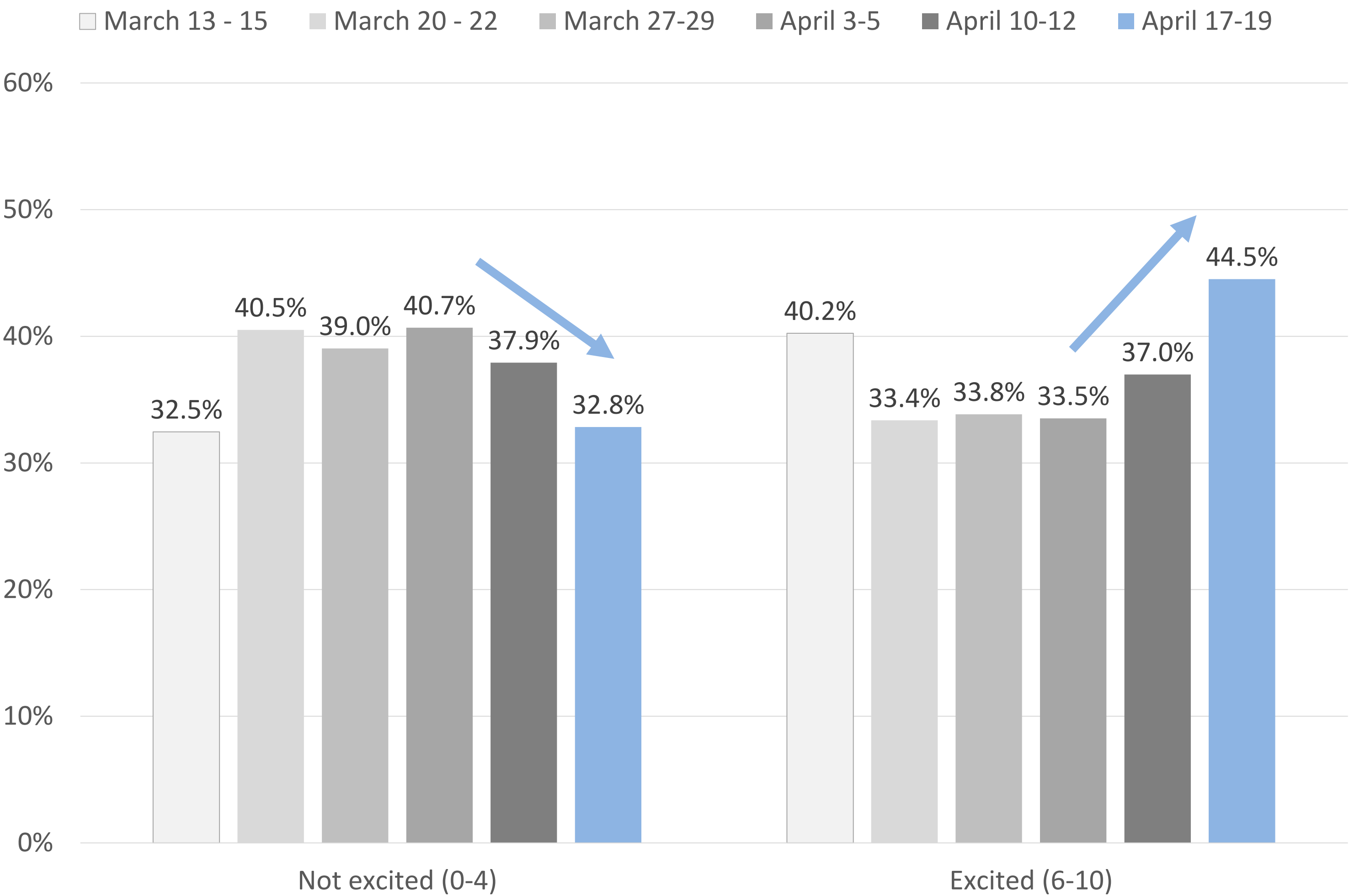
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)



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

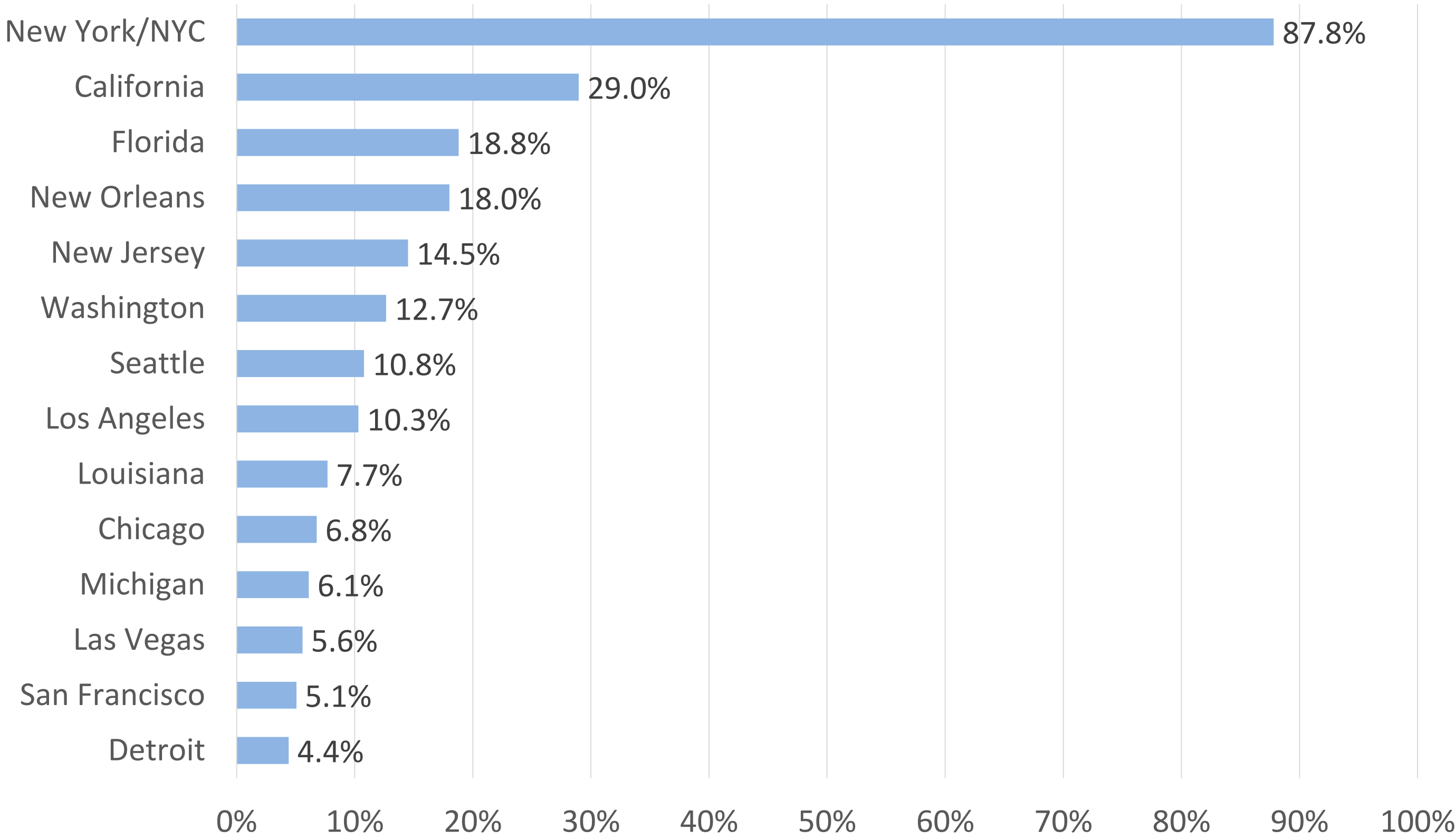


Most Talked About Coronavirus Hotspots

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

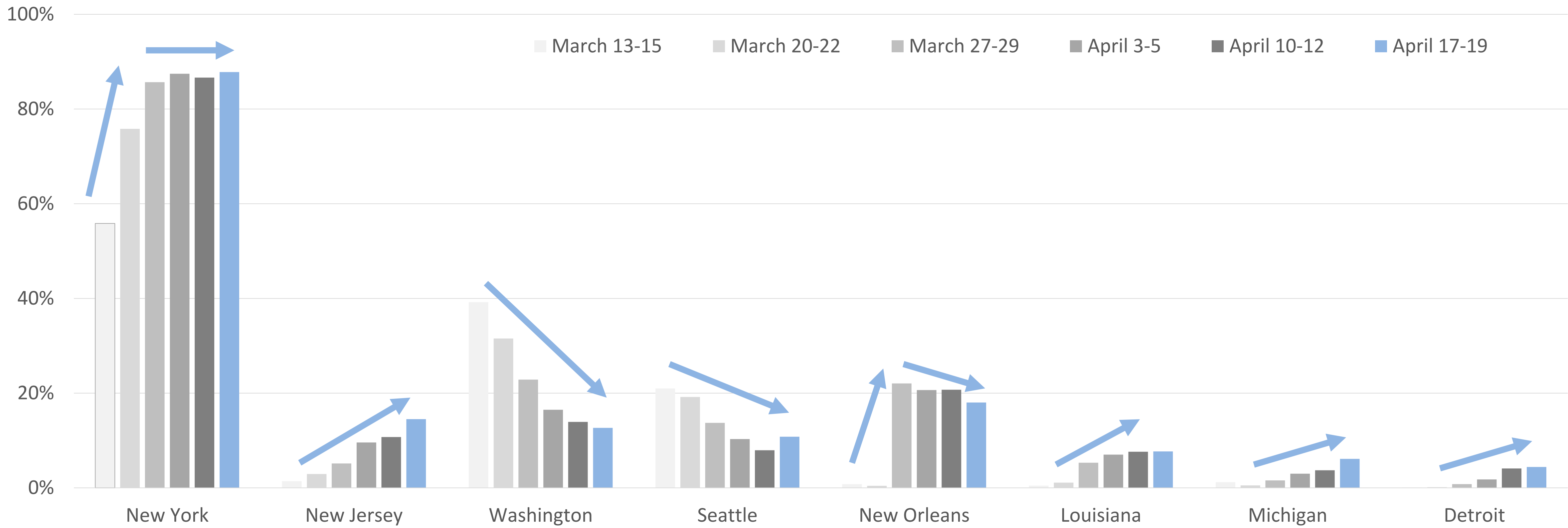
(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

New York continues to be the most talked about destination with coronavirus issues. Nearly 90 percent of survey respondents identified New York as one of the three most talked about places.



Most Talked About Coronavirus Hotspots

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



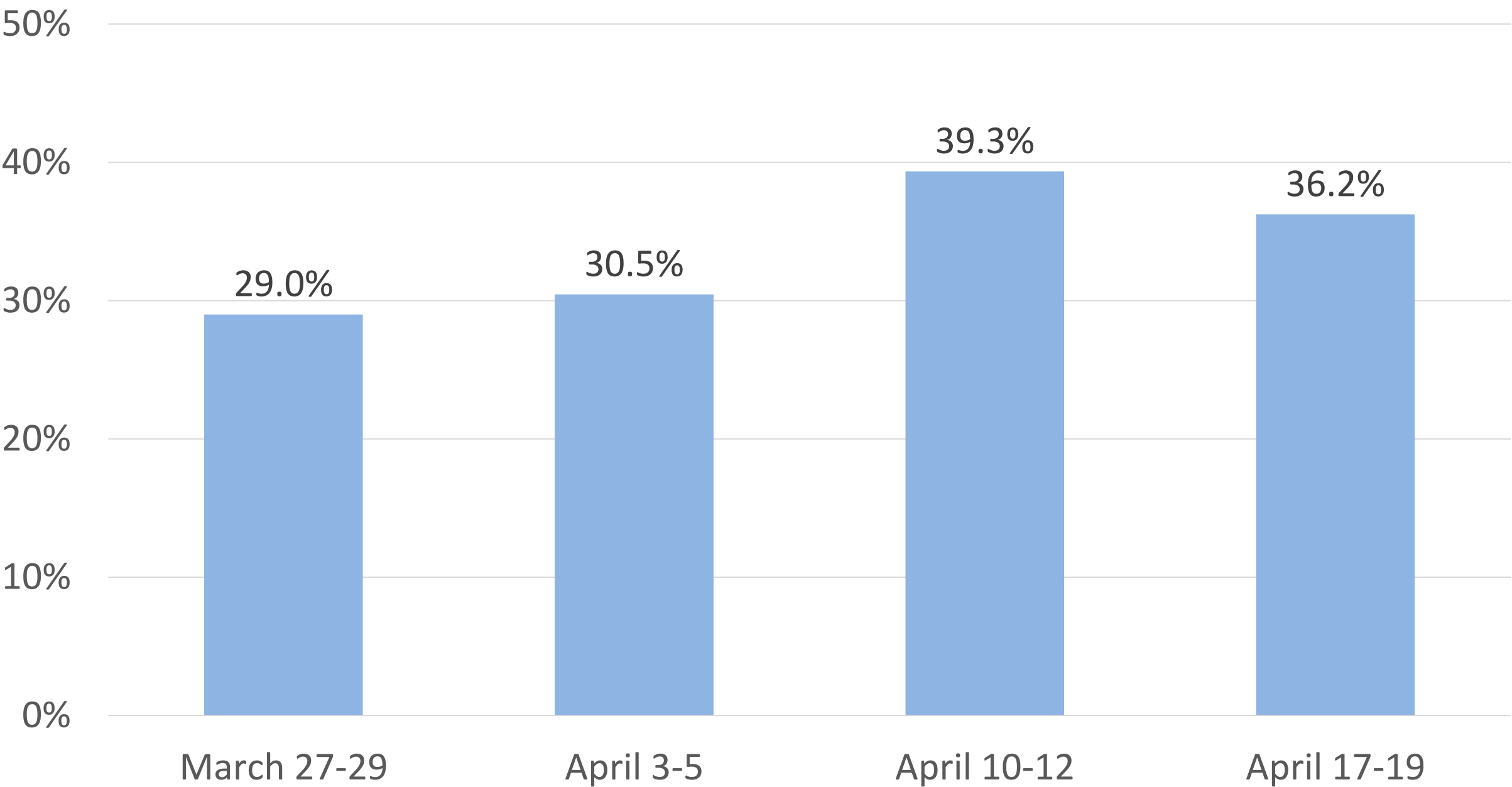
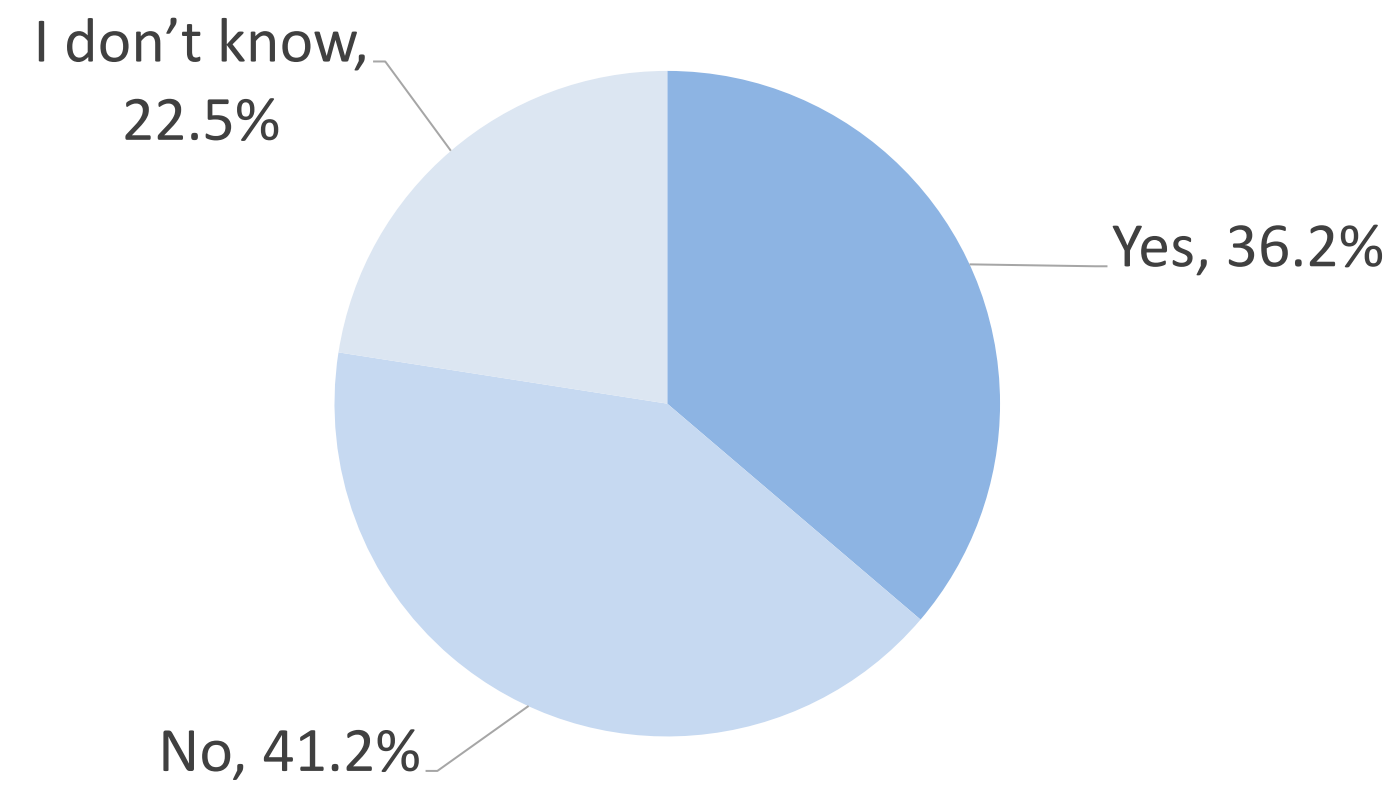
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

Changes in Travel after the Coronavirus Crisis

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

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

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



(Base: All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

Question Added in Wave 3

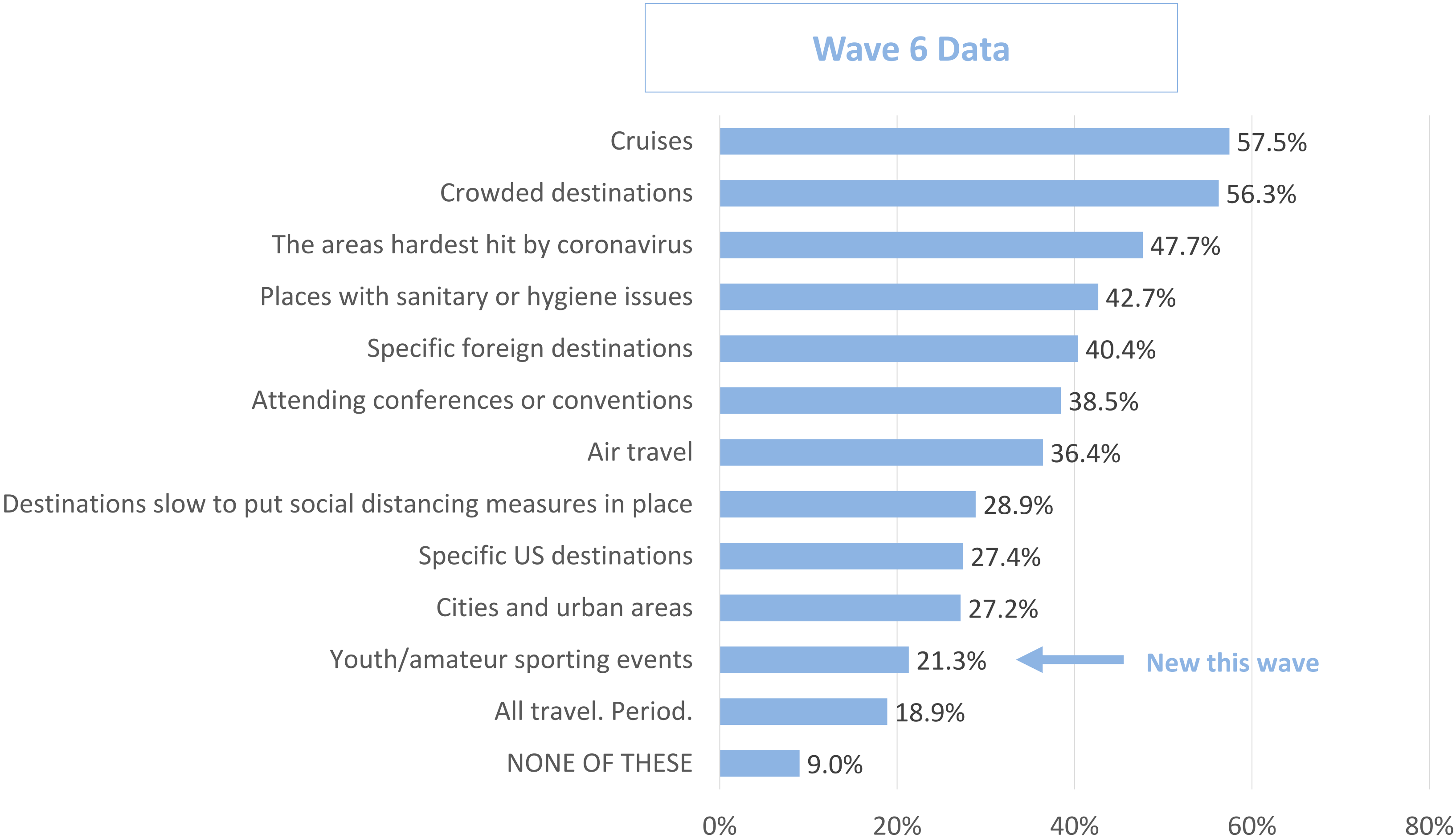
Changes in Travel after the Coronavirus Crisis: Aided

When asked which specific travel behaviors they will likely avoid after the crisis is over, well over half said they would avoid cruises (57.5%) and crowded destinations (56.3%).

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

I will most likely avoid _____.

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



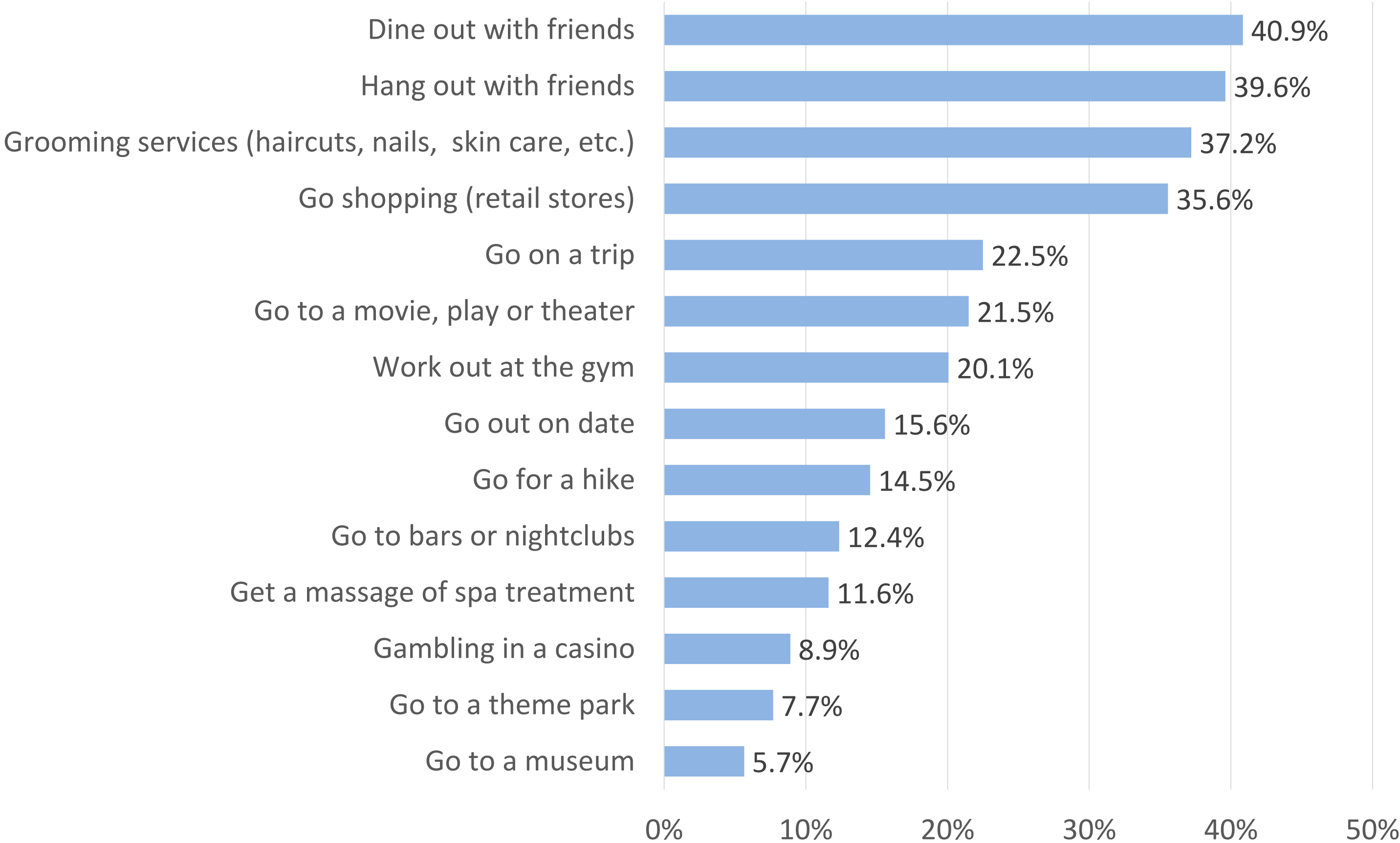
What They Most Want to Do After Sheltering

It seems that Americans most miss their friends. When asked to select the activities they most want to do after sheltering in place is finished, dining out with friends (40.9%) and hanging out with friends (39.6%) topped the list.

Question: What are the first things you are going to do when shelter-in-place restrictions are lifted? (Select as many as FIVE)

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

New Question Added in Wave 6



Most Desired Activities on First Post-Pandemic Trip

Question: Imagine it is some time later when you first begin feeling it is safe to travel again for leisure.

On your first trip what activities do you most want to do? (OPEN-ENDED QUESTION)

(Base: Wave 6. Cancelling trips, 643 completed surveys. Data collected April 17-19, 2020)



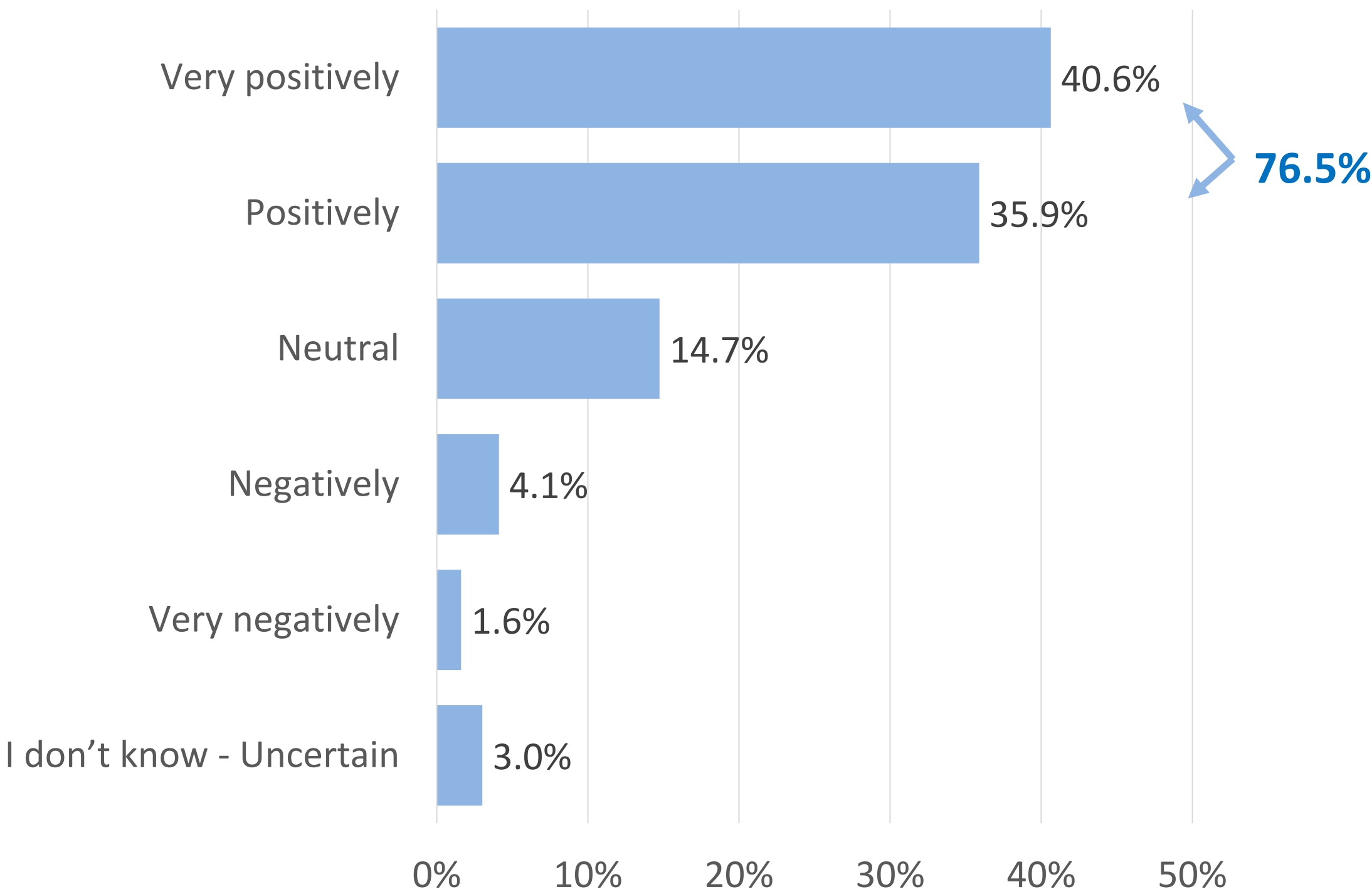
Opinions on Mandatory Airport Health Screenings

The final four questions dealt with a topic with which most respondents were expected to have little familiarity. Hence, they were given the following definition to use as a common point of reference for answering the questions:

Mandatory health screenings are currently being done at some U.S. airports. In these screenings, travelers fill out a short questionnaire about their travel, any symptoms they might have, and their contact information. Medical staff then take the temperature of each traveler with a hand-held thermometer that doesn't touch the skin and observe the traveler for any signs of illness, like a cough or difficulty breathing. These screenings are now primarily used for flights arriving into the United States and its territories.



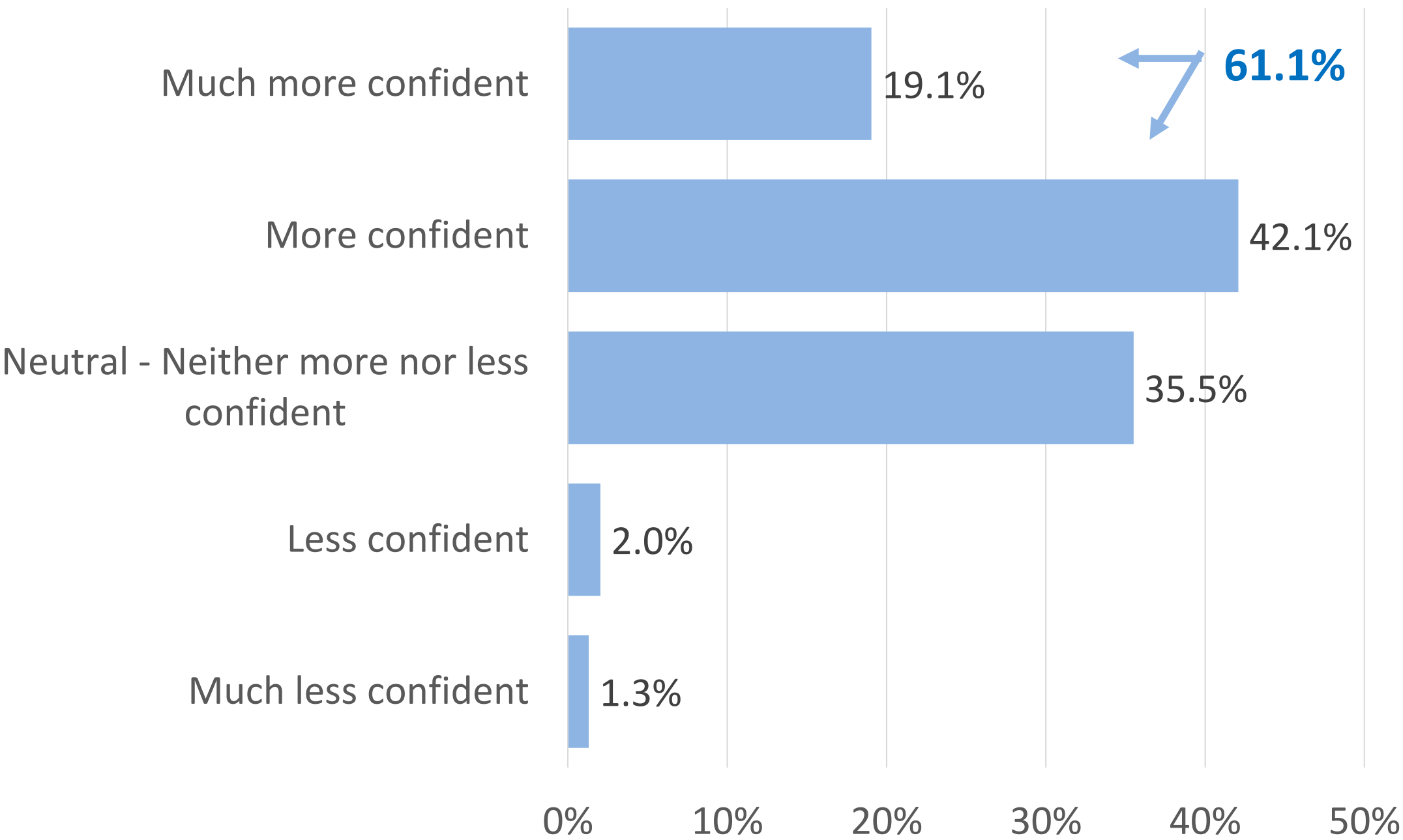
Question: In general, how do you feel about mandatory health screenings at airports?



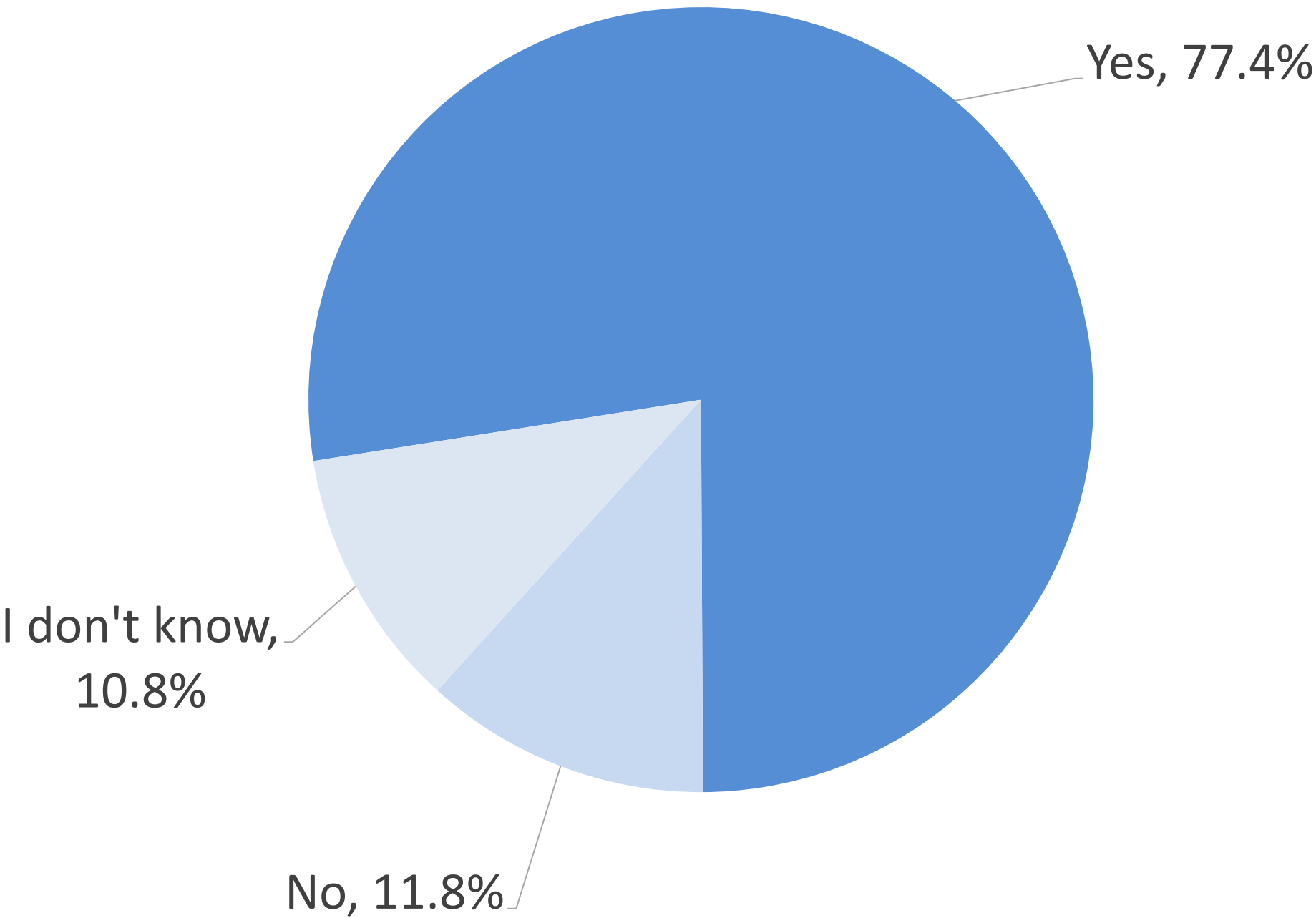
(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

Question: Would mandatory airport screening measures impact your confidence in traveling to a destination? (Select one that best fills in the blank)

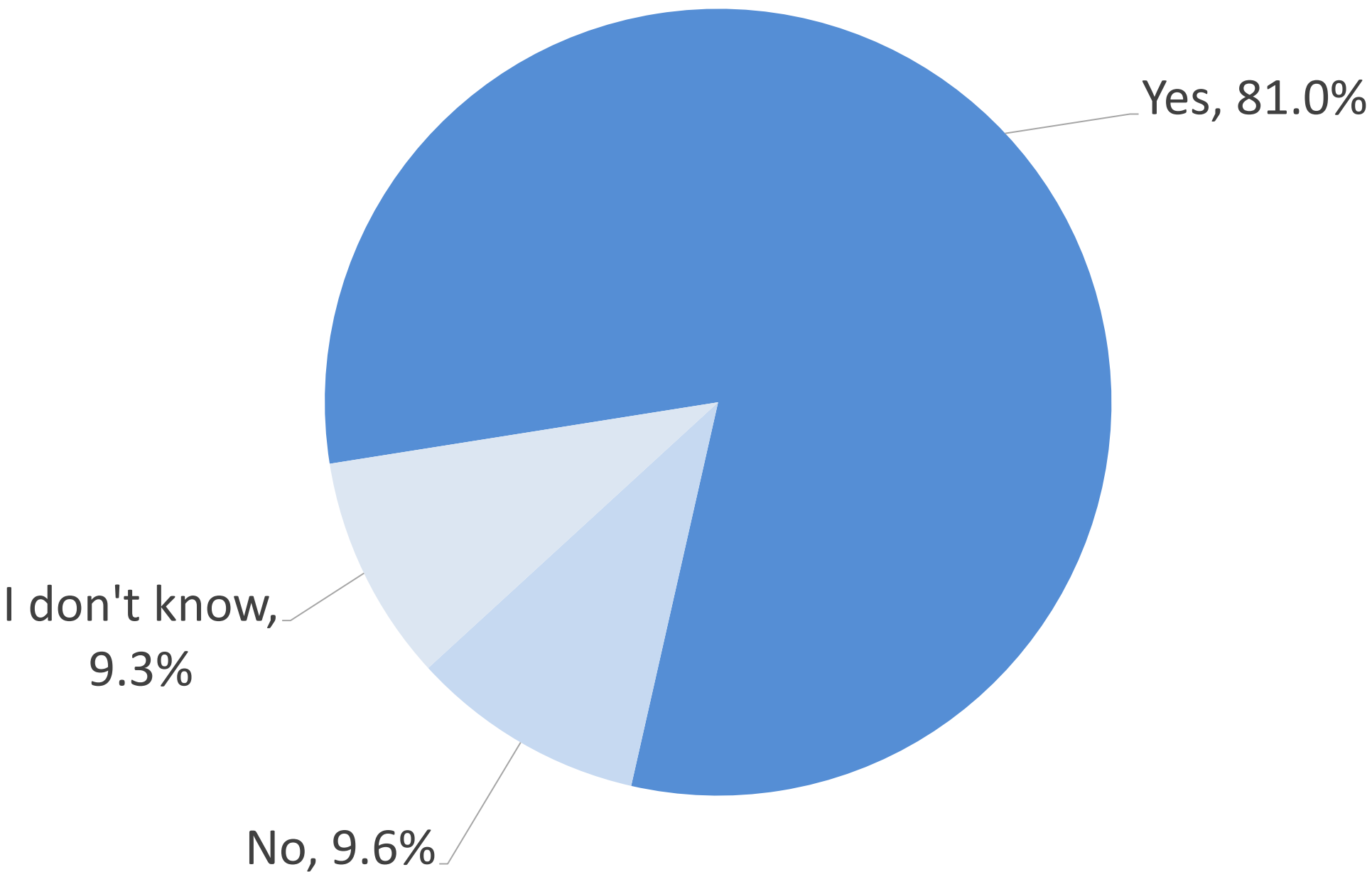
If a destination's airport had mandatory health screenings, I would feel _____ about visiting that destination.



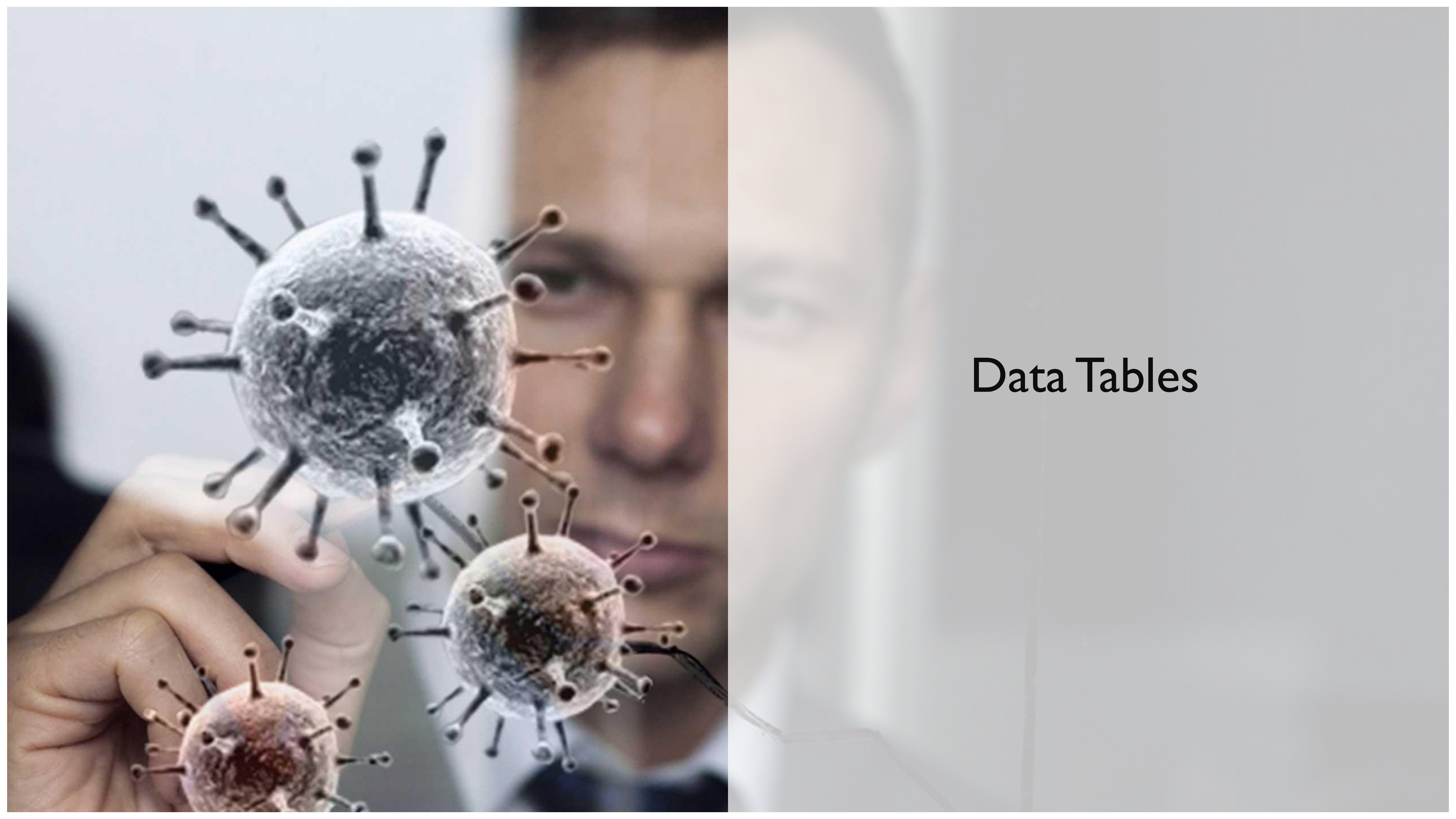
Question: Would you approve of mandatory health screenings for flights between destinations inside the continental United States?



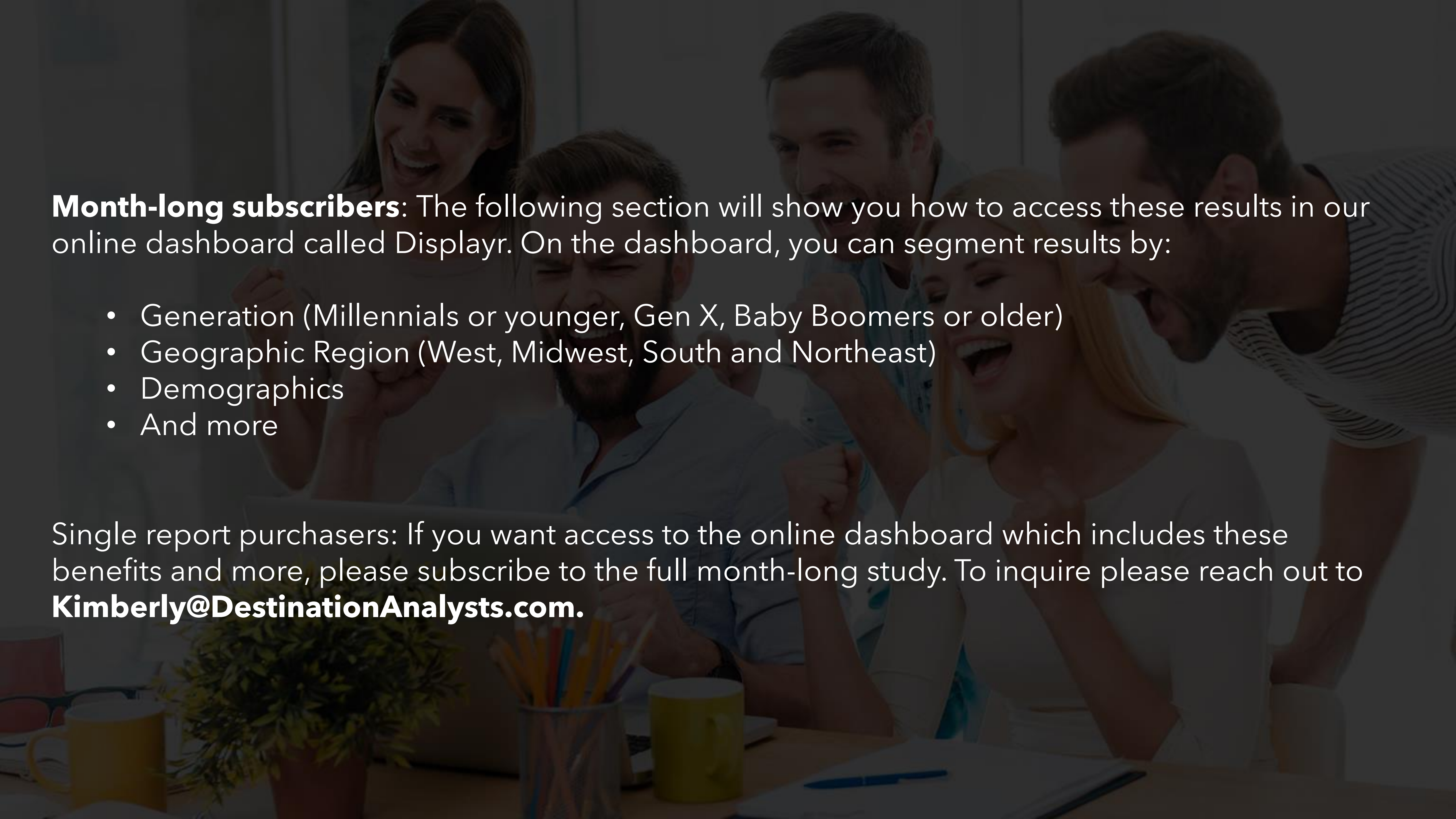
Question: Would you approve of mandatory health screenings prior to boarding airplanes?



(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



Data Tables



Month-long subscribers: The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

- Generation (Millennials or younger, Gen X, Baby Boomers or older)
- Geographic Region (West, Midwest, South and Northeast)
- Demographics
- And more

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

HOW TO USE DISPLYR

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



NAVIGATING THE DASHBOARD:

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

Coronavirus Travel Sentiment Index Report

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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.

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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

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Regional Trips as a Replacement for

Avoiding Conferences or Conventior

Avoiding Conferences or Conventior

Avoiding International Travel

Avoiding International Travel - Break

Comfort Enjoying Home Community

Comfort Enjoying Home Community

Discounts Drive Interest in Travel

Discounts Drive Interest in Travel - B

Upcoming Travel Plans

Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination Analysts

FILTERING THE REPORT:

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

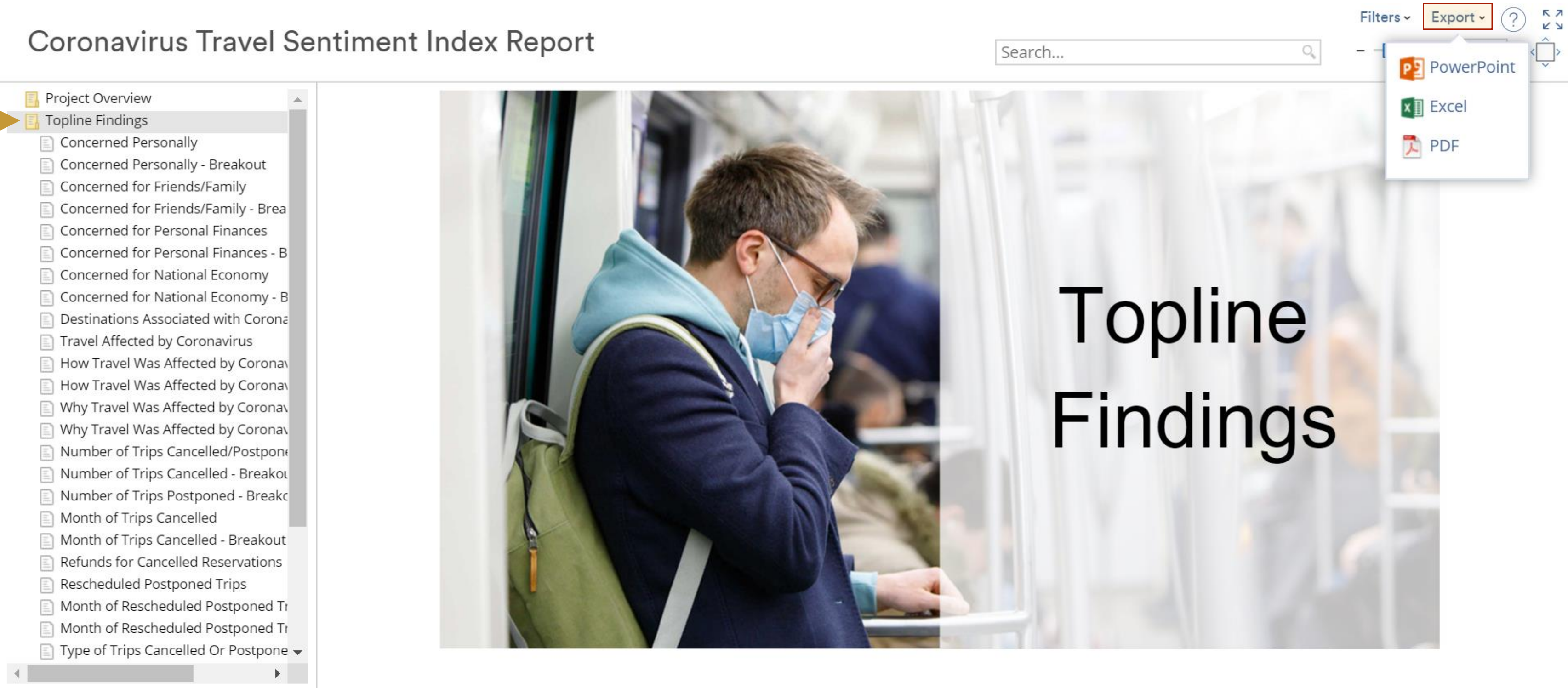


IMPORTANT NOTE: When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

EXPORTING THE DATA:

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

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

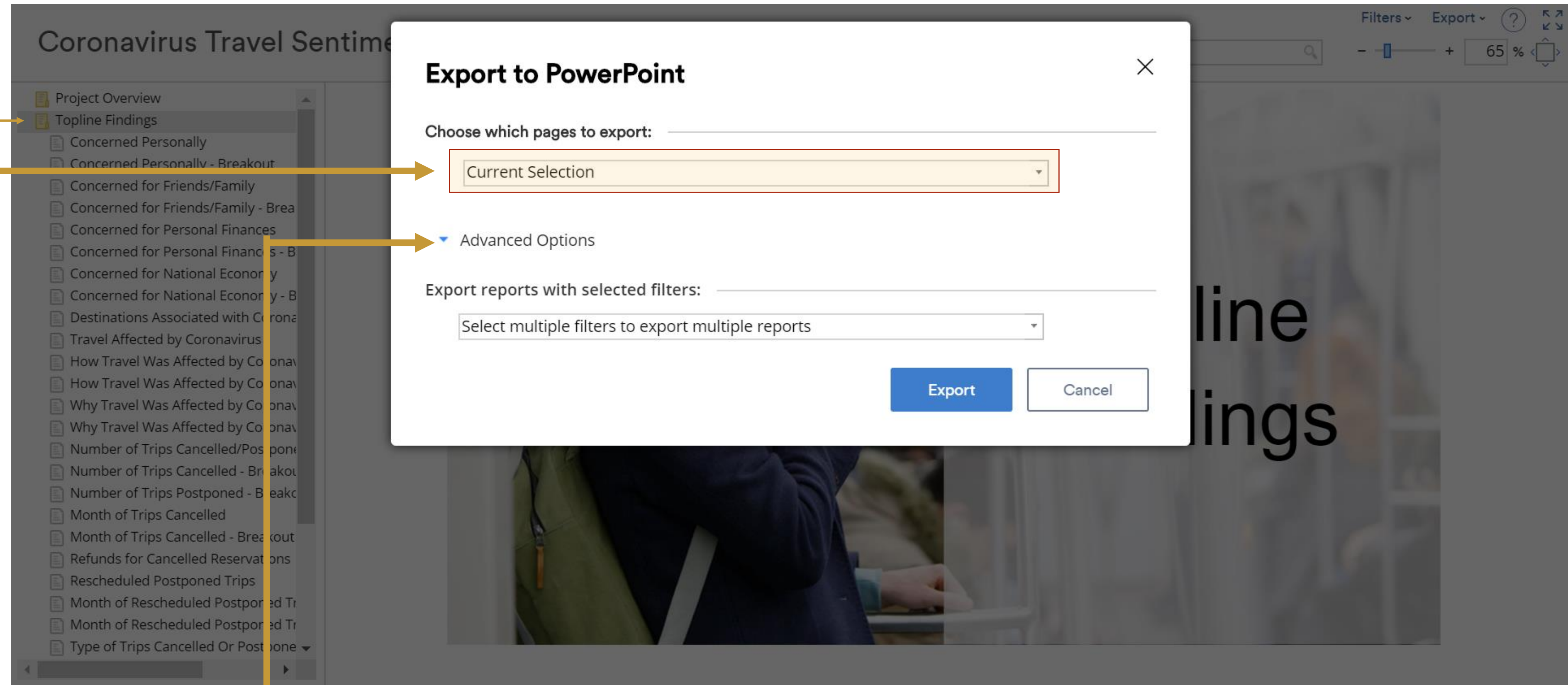


EXPORTING THE DATA:

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

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

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



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

NEED MORE HELP?

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

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