

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JUNE 8<sup>th</sup>, 2020



# About Destination Analysts

Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

In addition to this report, Destination Analysts conducts **The State of the American Traveler** and **The State of the International Traveler**—the travel industry's premier studies for tracking traveler sentiment and global destination brand performance—as well as **The CVB and the Future of the Meetings Industry** annual study helping destination marketing organizations transform their meetings sales and services strategies.





## IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

**THANK YOU IN ADVANCE**



The background image is a collage of travel-related items. On the left, a pair of hands holds up a world map. In the center, a pair of hands holds a pair of sunglasses. On the right, a hand holds several Euro banknotes, including 100 and 50 Euro notes. The entire image is overlaid with a semi-transparent dark grey filter.

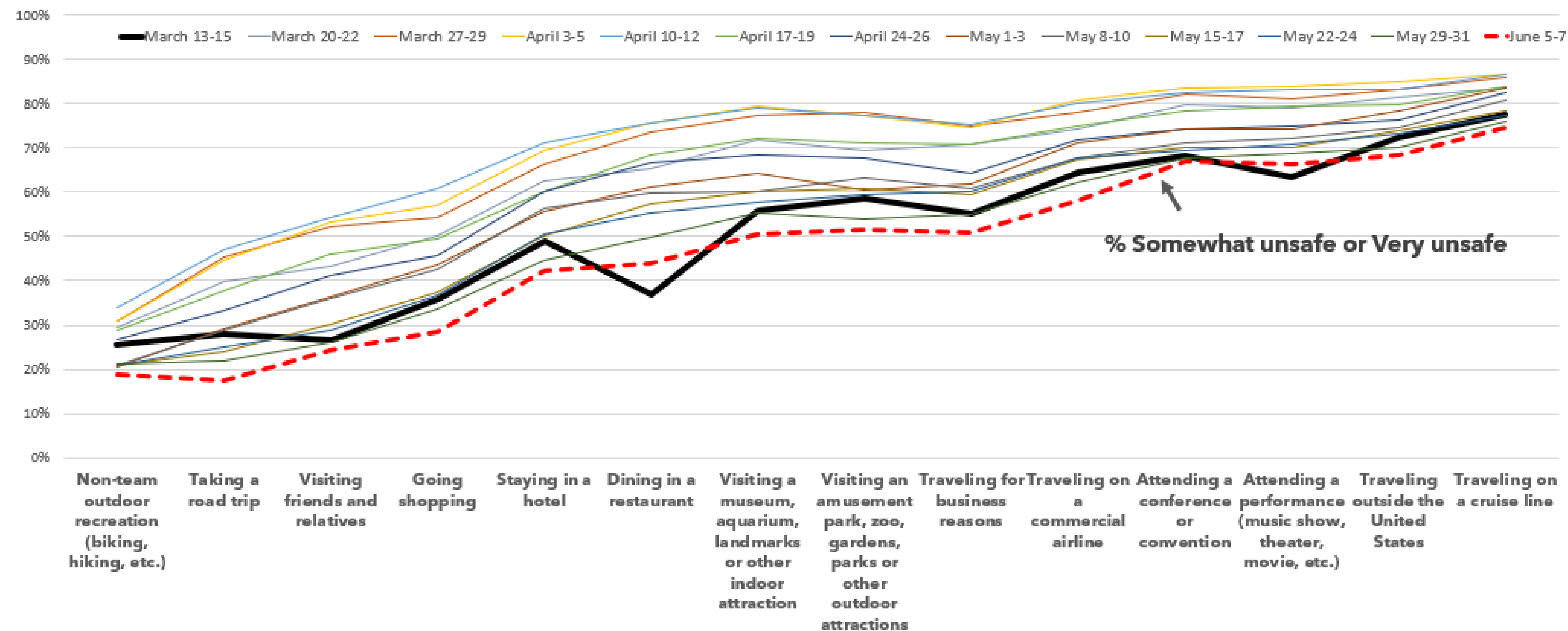
# Key Findings for the Week of June 8<sup>th</sup>

**Please cite Destination Analysts when using or distributing this data**

# Perceived Safety of Travel Activities (March 15<sup>th</sup> – June 7<sup>th</sup>)

American travelers’ feelings about their health and financial safety continue to improve and perceptions of the safety of travel-related activities are now better than they were in mid-March.

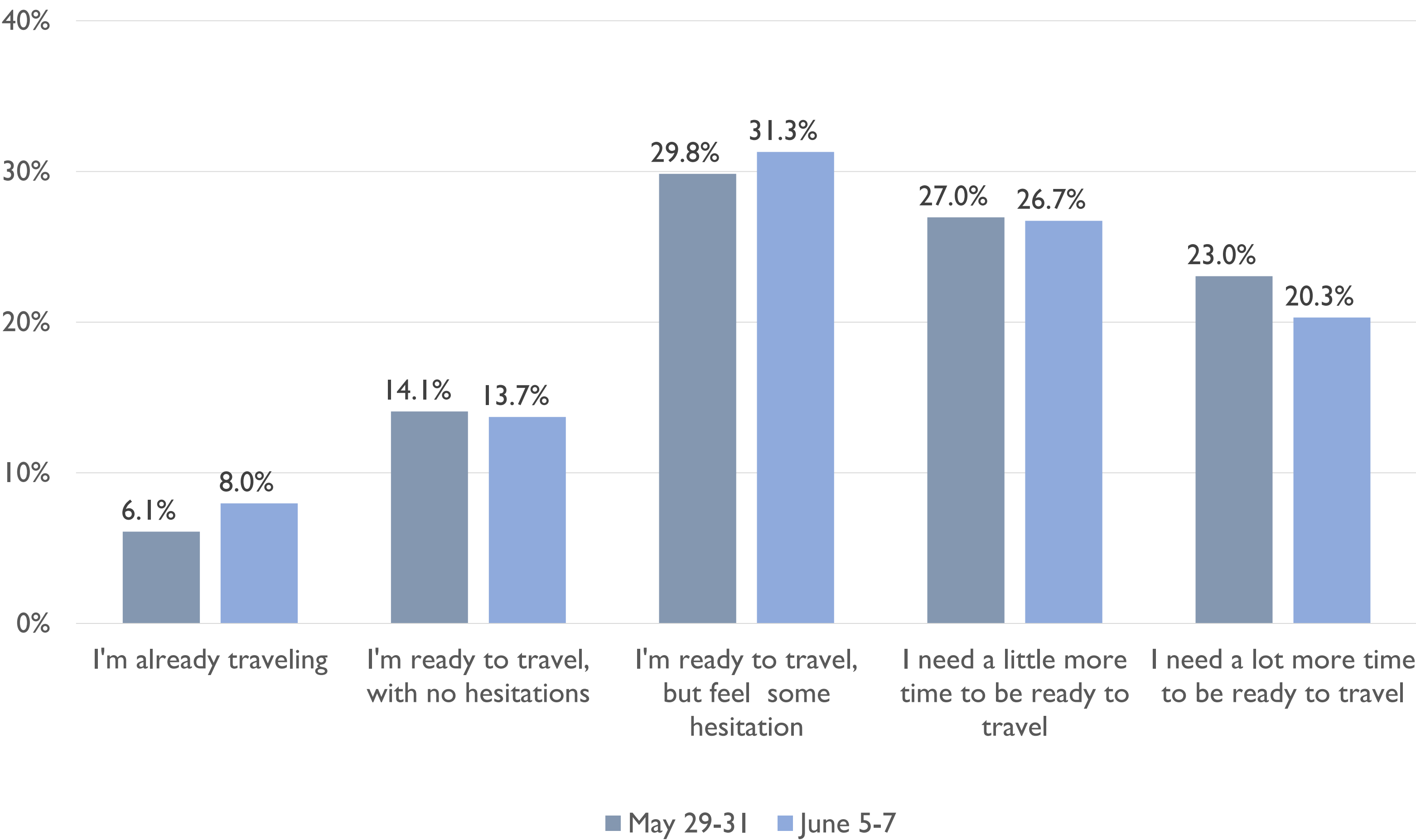
Question: At this moment, how safe would you feel doing each type of travel activity?



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257 and 1,214 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 and June 5-7, 2020)

# Americans' Travel State of Mind

**More Americans report they are already traveling or feel ready to travel compared to last week, and 70 percent continue to say they will take at least one leisure trip in the remainder of this year.**

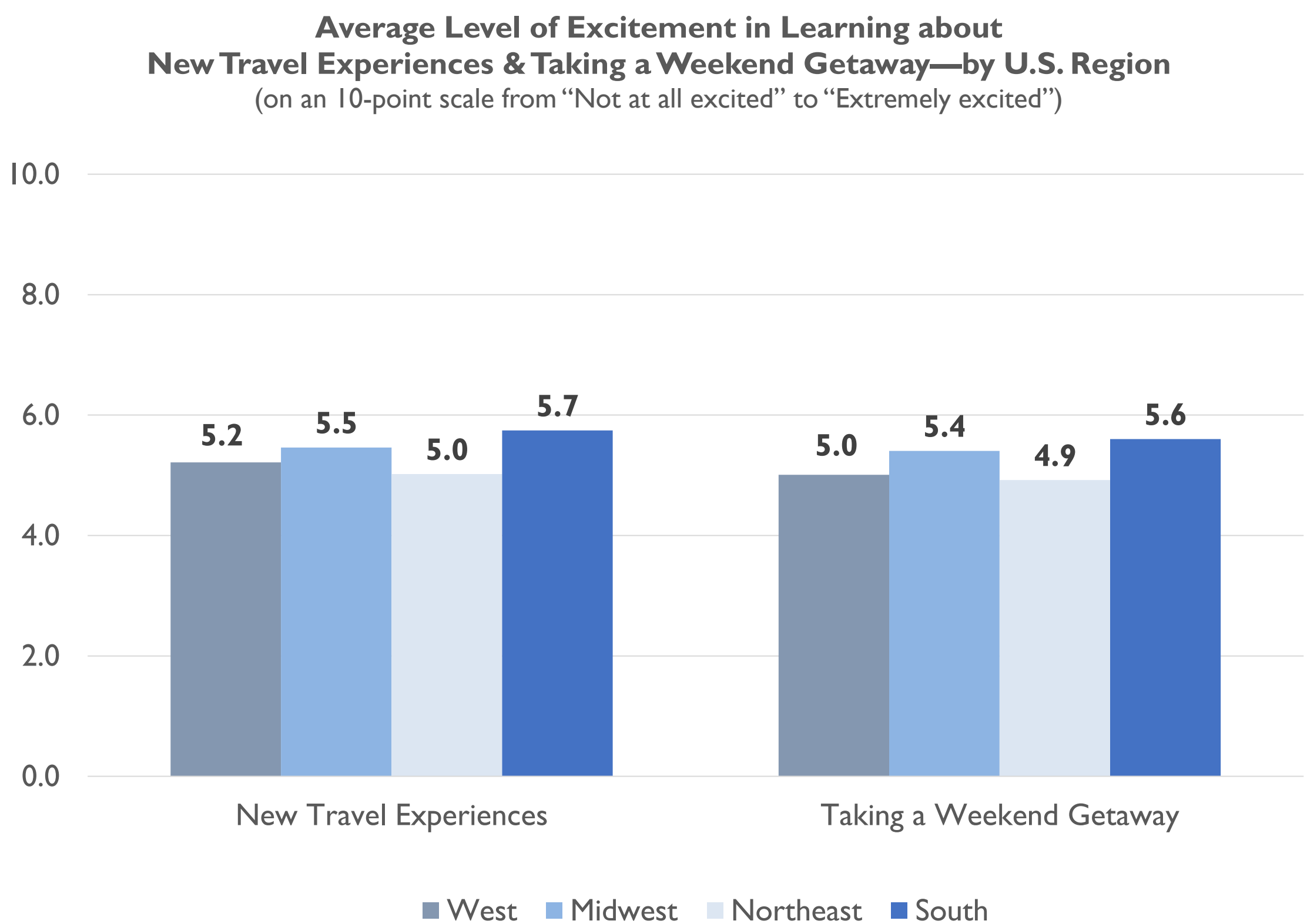
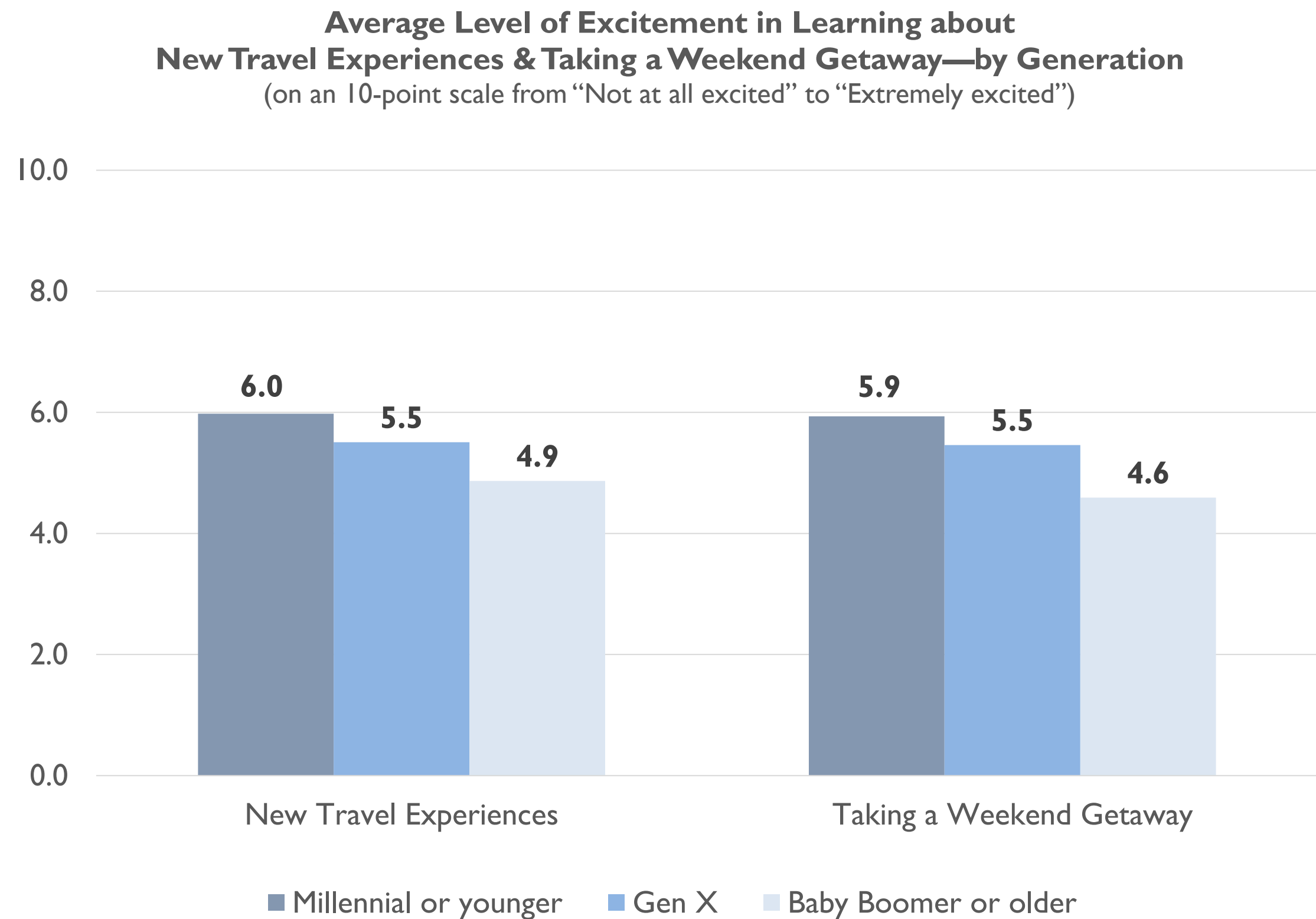


**Question:** When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

(Base: All respondents. 1,257 and 1,214 completed surveys. Data collected May 29-31 and June 5-7, 2020)

# Openness to Travel Inspiration & Excitement to Take a Getaway

Younger travelers —those in the Millennial and GenZ generations—and travelers in the Southern U.S. continue to be most excited to travel in the next month and open to travel inspiration.



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

**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)

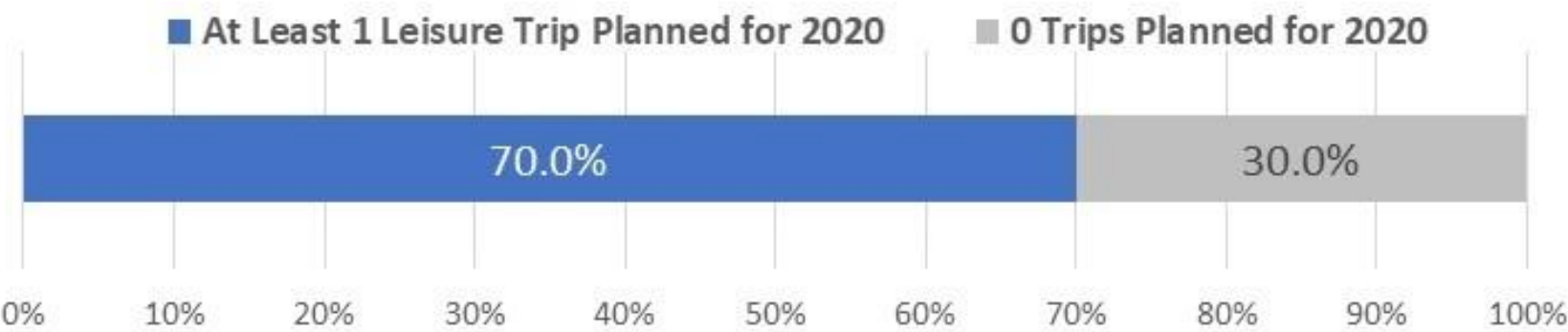


# American Travelers' Next Leisure Trip

Americans are also exhibiting conviction about their leisure travel plans, rather than tentativeness. In looking at their next leisure trip, over three-quarters (76.4%) have a developed sense of where and when this travel will take place.

(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)

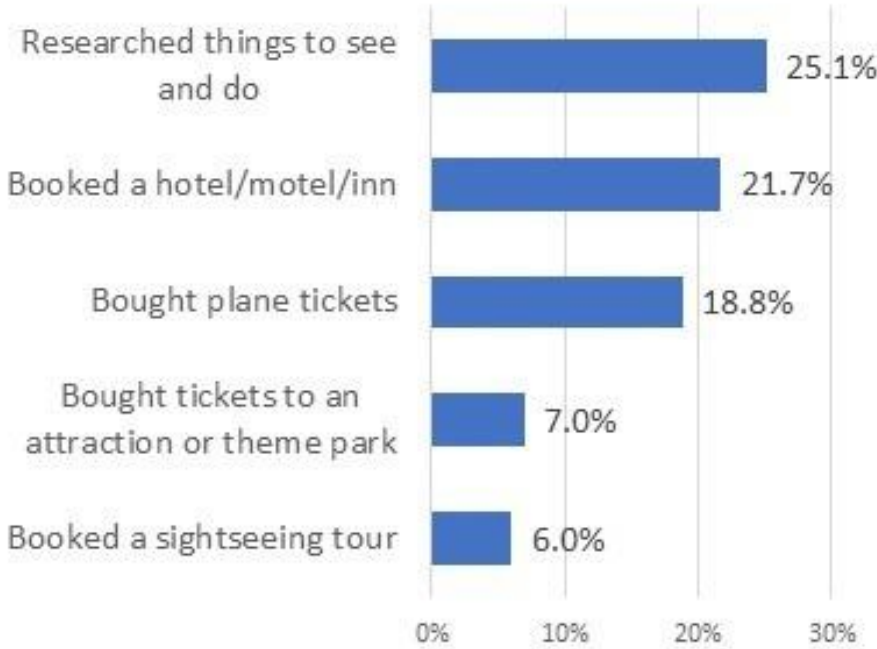
## AMERICAN TRAVELERS' NEXT LEISURE TRIP (AS OF JUNE 8<sup>TH</sup>, 2020)



### EXTENT OF TRIP PLAN DEVELOPMENT



### TRIP PLANNING ACTIONS COMPLETED





# American Travelers' Next Leisure Trip

There is also a notable degree of confidence that this trip will happen, in spite of coronavirus issues that may arise: 52.4% say there is absolutely no—or only a slight—chance they will cancel this next trip. Nevertheless, safety considerations are still important to travelers' decision-making, from which destination they choose for this trip, to their selection of lodging and transportation options. The majority of American travelers continue to opt for beach, outdoor and rural type experiences for their next leisure trips.

## AMERICAN TRAVELERS' NEXT LEISURE TRIP (AS OF JUNE 8<sup>TH</sup>, 2020)



### TRIP DETAILS & CONSIDERATIONS



### CHANCE OF TRIP CANCELLATION DUE TO CORONAVIRUS SITUATION



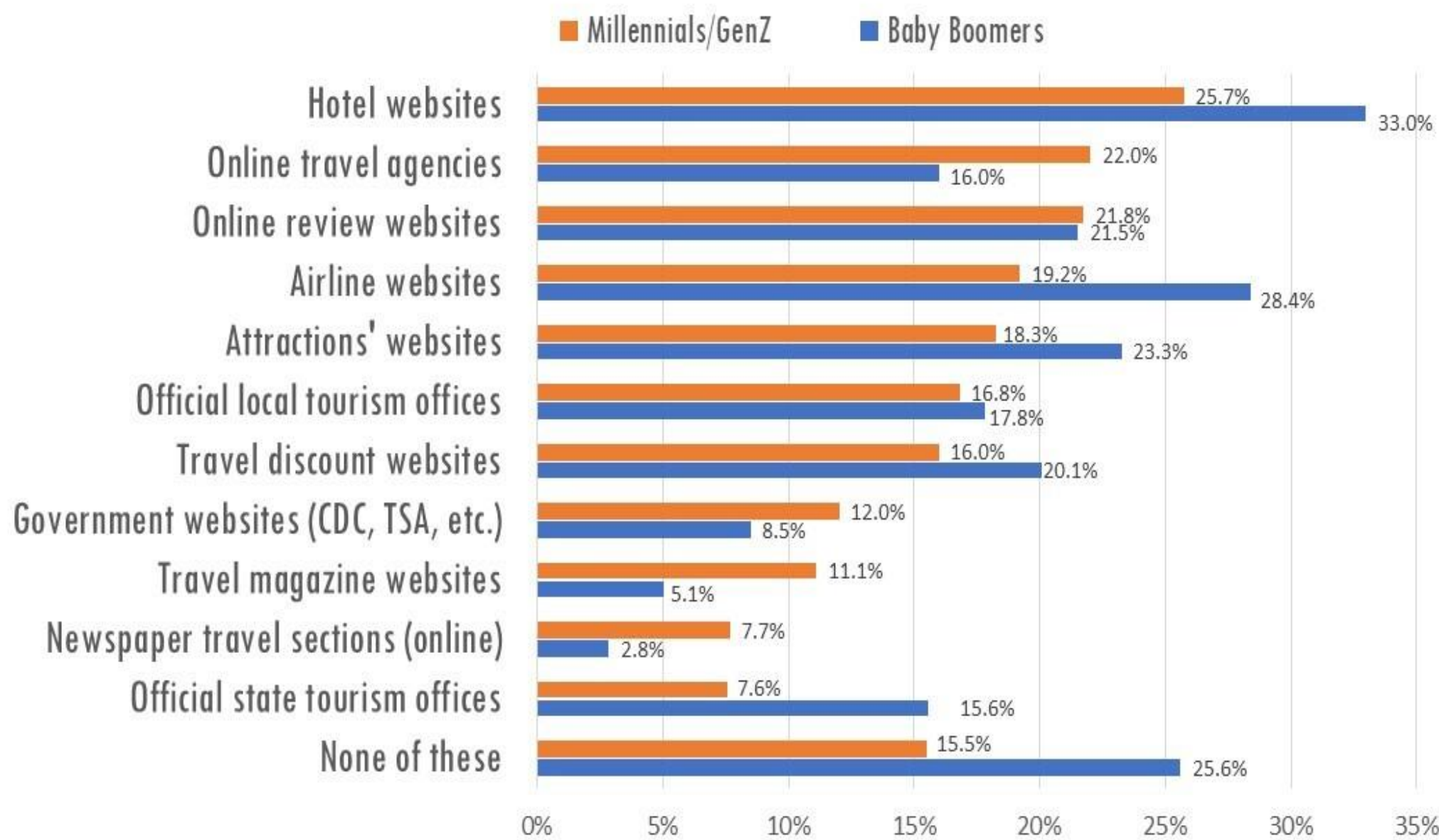
(Base: Respondents with a trip at least tentatively planned in 2020, 853 completed surveys. Data collected June 5-7, 2020)



# Online Trip Planning Resources & Means of Travel Research

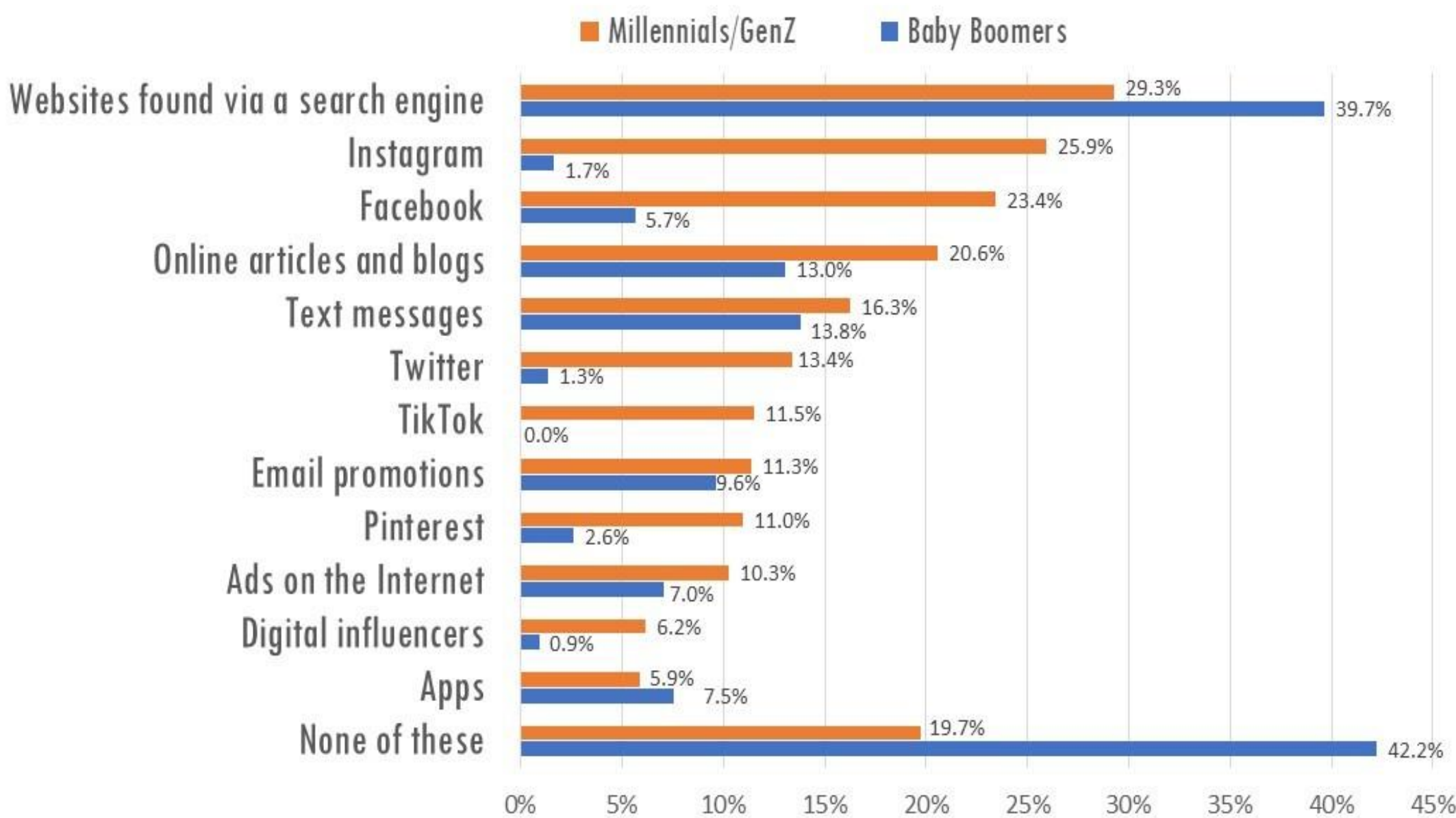
For their research and planning of this next trip, American travelers are now largely looking directly to travel providers and travel content producers rather than sources like the CDC—perhaps an additional display of their confidence about navigating the coronavirus situation. Younger generations are likelier to use a diverse set of social media and digital tools for their travel research for this next trip, while Baby Boomers are more likely to concentrate their travel research activity on web searches.

ONLINE TRIP PLANNING RESOURCES FOR NEXT LEISURE TRIP



Question: Which of these ONLINE RESOURCES will you be likely to use to plan this trip?

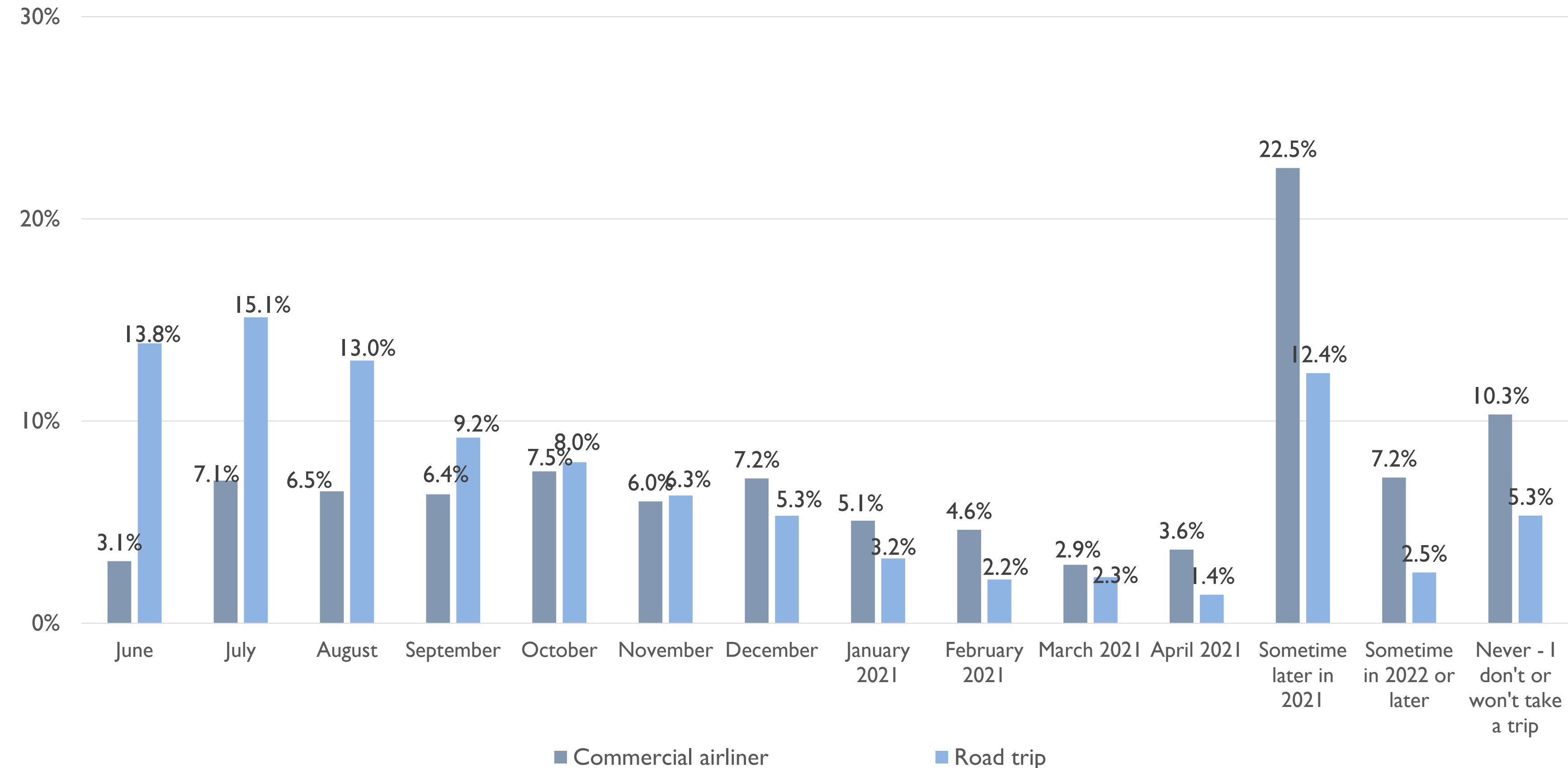
MEANS OF TRAVEL RESEARCH FOR NEXT LEISURE TRIP



Question: Please think about the planning you have done (or will do) for this upcoming trip. Which of these have you used (or will you use) to gather information for this trip?

# Month of Next Road and Commercial Airline Trip

**Many American travelers continue to say their next road trip will be this summer, with 40% listing June, July or August as their timing.** About half that number say their next trip by air will occur in the summer; 30% say their the next commercial airline trip will be September or later in 2020, with the remainder putting it off until 2021 or later.



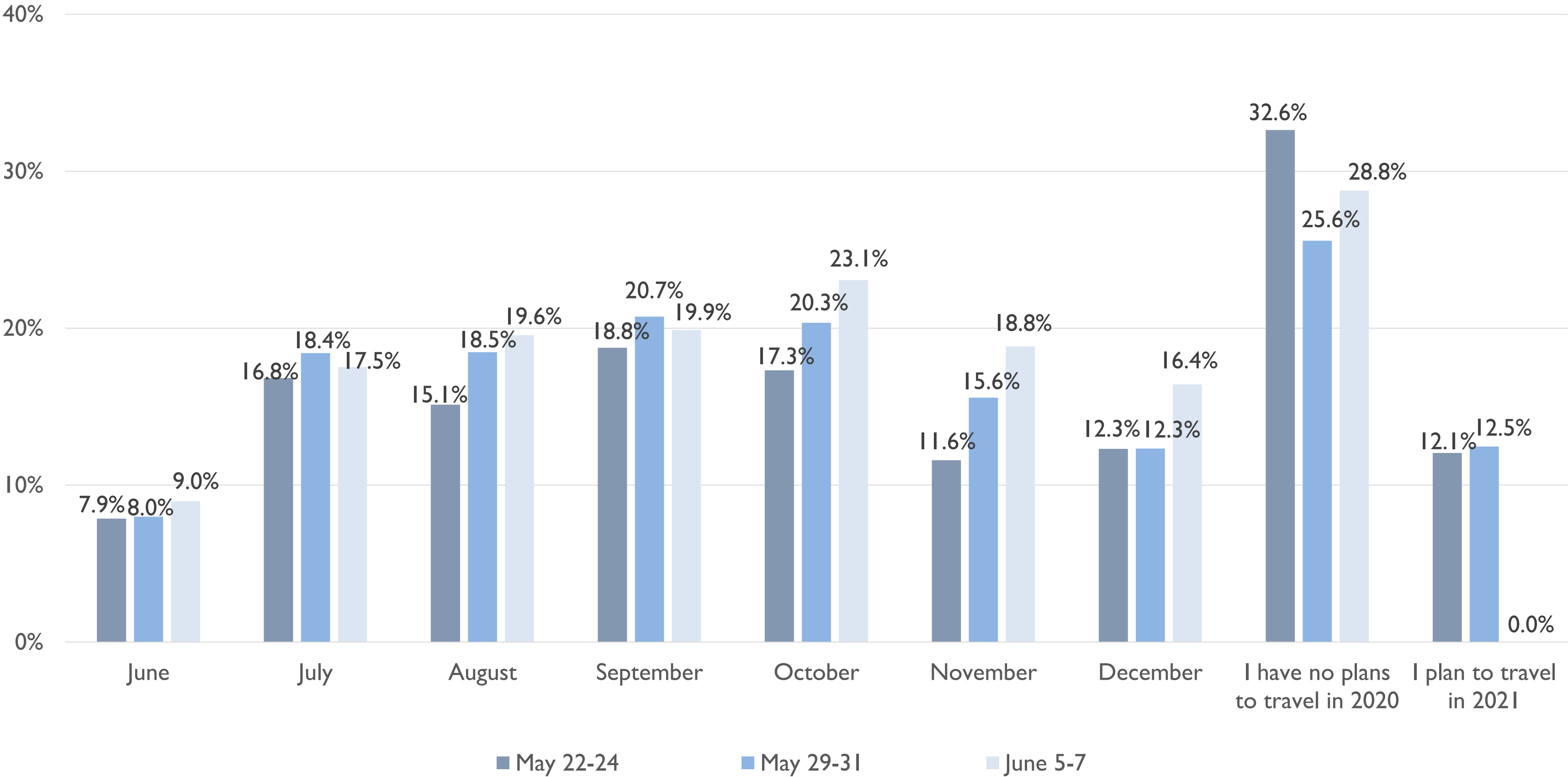
**Question:** In what month do you expect you will take your NEXT TRIP on a commercial airline?  
**Question:** In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

(Base: All respondents, 1,214 completed surveys. Data collected June 5-7, 2020)



# Months of Upcoming Travel Plans

This week, an increased number of Americans reported they have at least tentative leisure trip plans in the months of June, August, October, November and December.



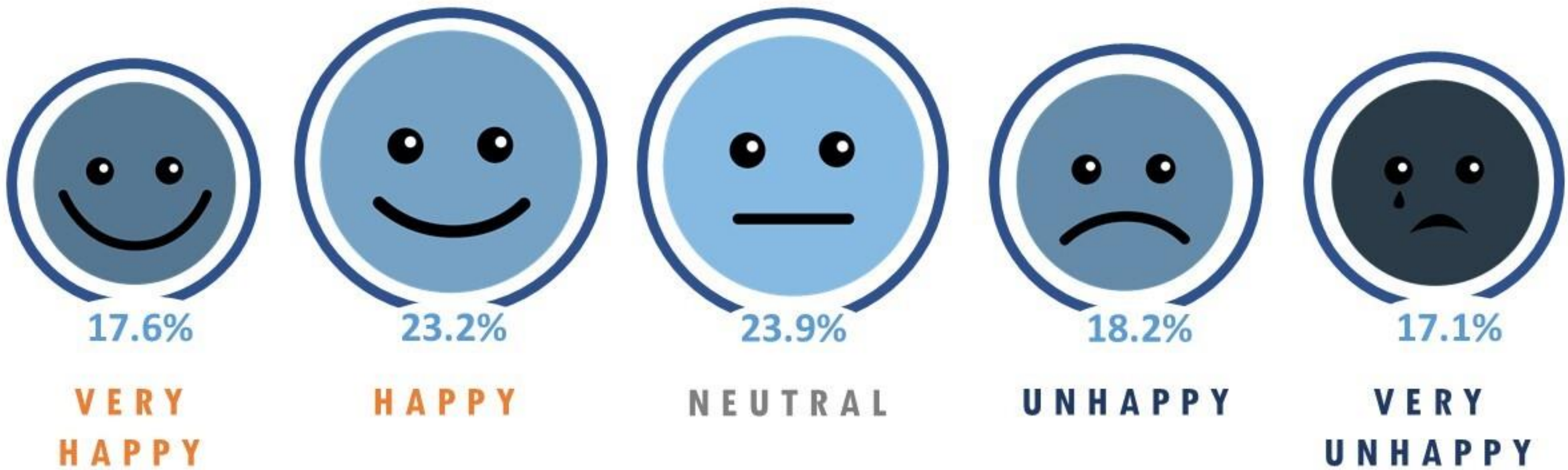
**Question:** Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

(Base: Waves 11-13. 1,223 ,1,257 and 1,214 completed surveys. Data collected May 22-24, 29-31 and June 5-7, 2020)

# Feelings About Being Asked to Attend a Conference, Convention or Meeting

To understand how employee feelings may play into when business and convention travel return, this week a series of questions were asked to gauge emotions around this type of travel in the Summer and Fall. Nearly half of employed Americans reported they would be unhappy if their employer asked them to take an out-of-state business trip in July; meanwhile, about a quarter would be happy to. However, 40.8% of those that typically travel for conventions and conferences said they would be happy if they were asked to attend a convention in the Fall (35.3% said they would be unhappy). As of this week, 25.0% of convention/conference travelers say they have at least a tentative plan to attend a group meeting in the remainder of 2020.

## CONVENTION TRAVELERS: RESPONSE TO BEING ASKED TO ATTEND A CONVENTION/CONFERENCE THIS FALL



**Question:** How would you feel if you were asked to attend a conference, convention or group meeting sometime this Fall?

*(Base: Respondents attending a conference, convention or group meeting in the past 2 years, 404 completed surveys.  
Data collected June 5-7, 2020)*





# Coronavirus Travel Sentiment Index

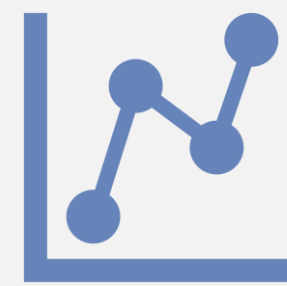
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 8<sup>th</sup>

# 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.

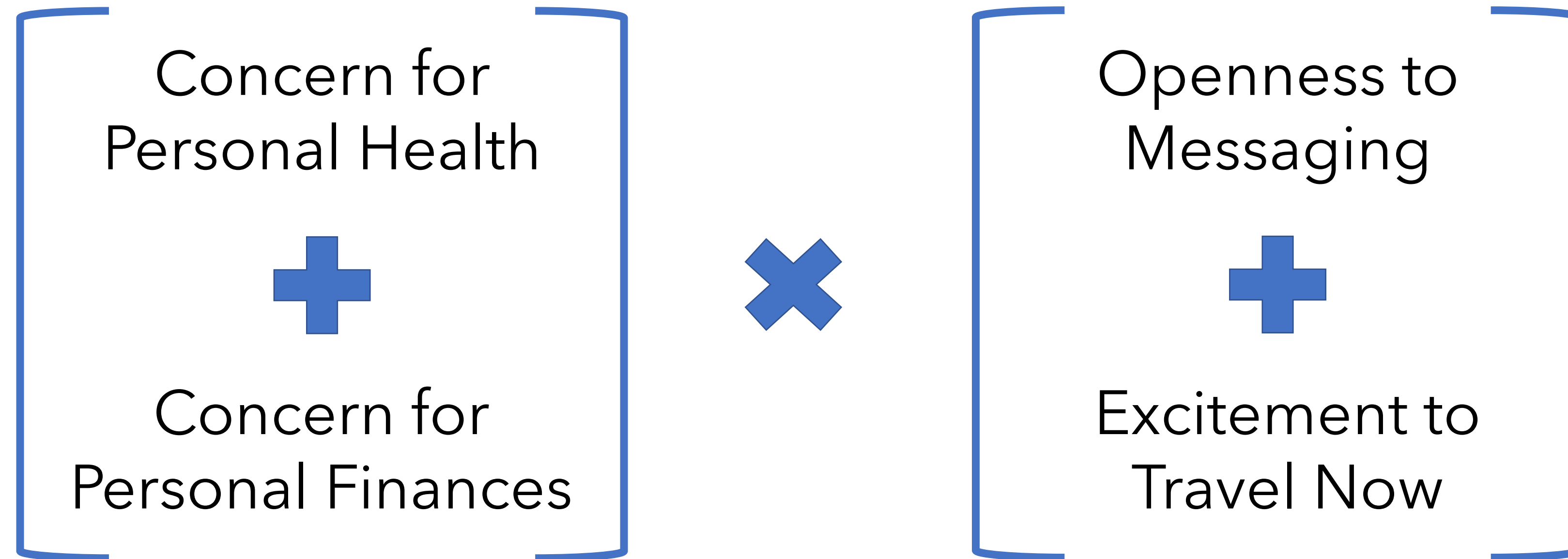


The goals are to identify:

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

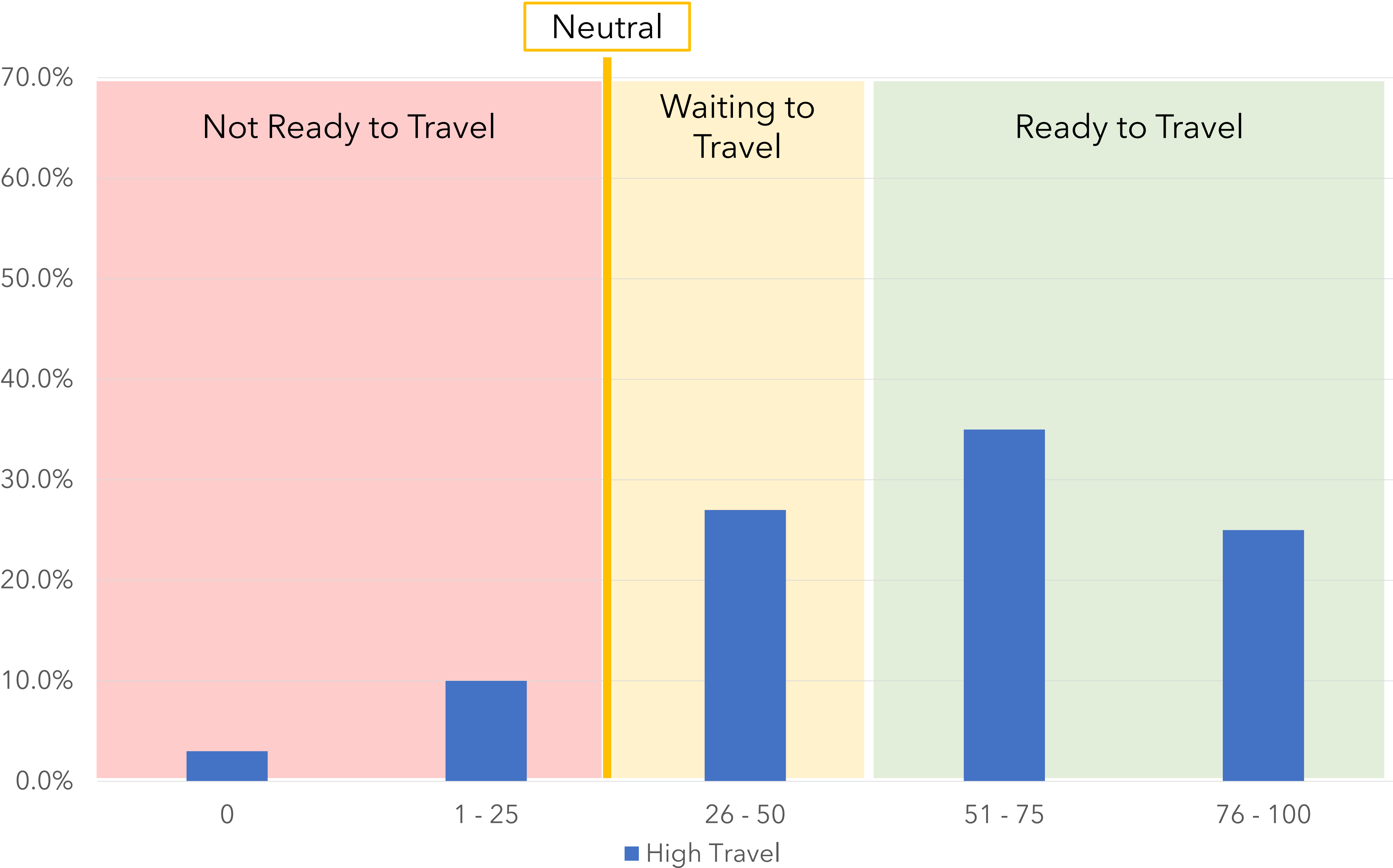


# Predictive Index Formula



\*Normalized to a 100pt scale

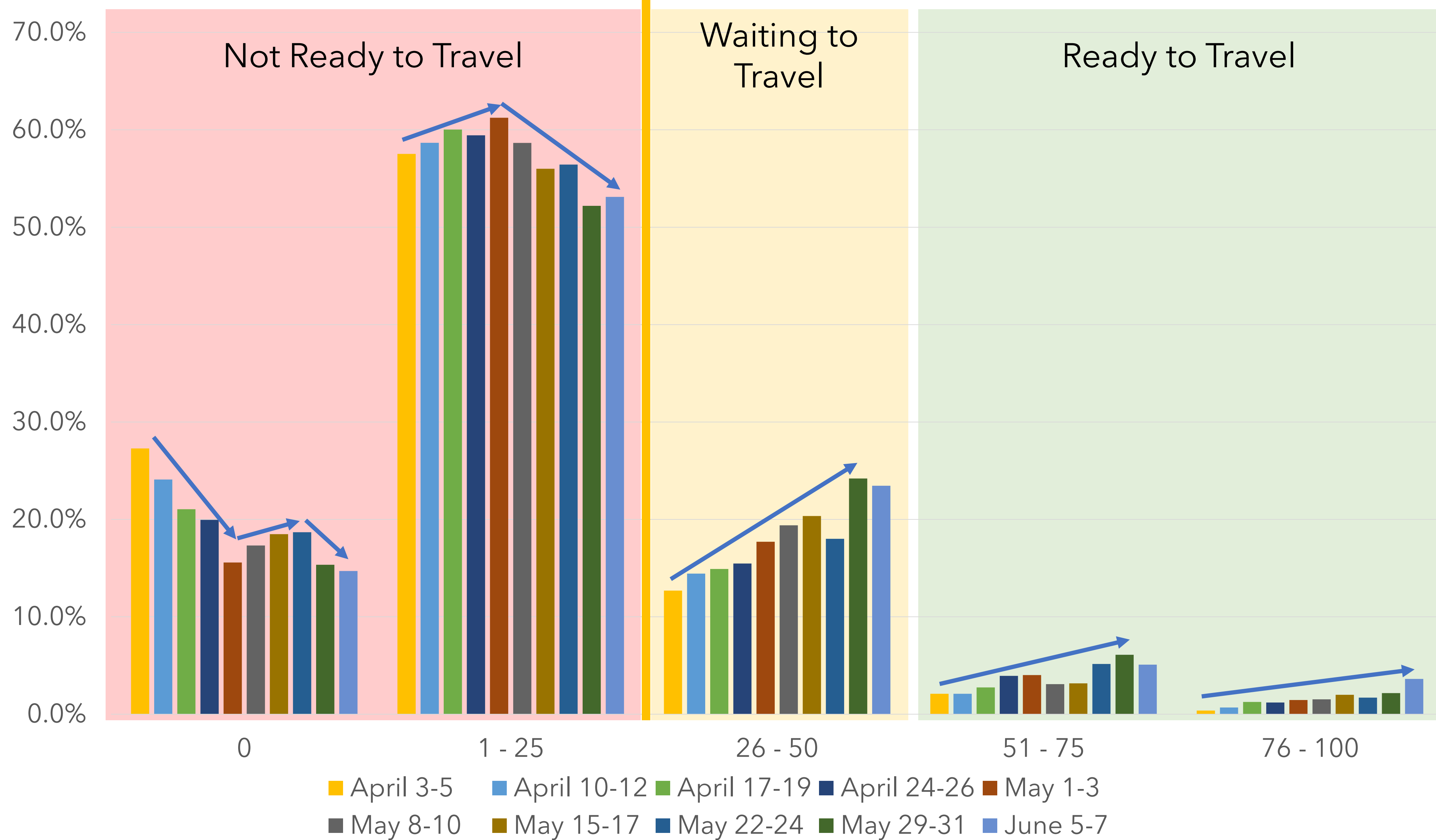
# Healthy Travel Outlook

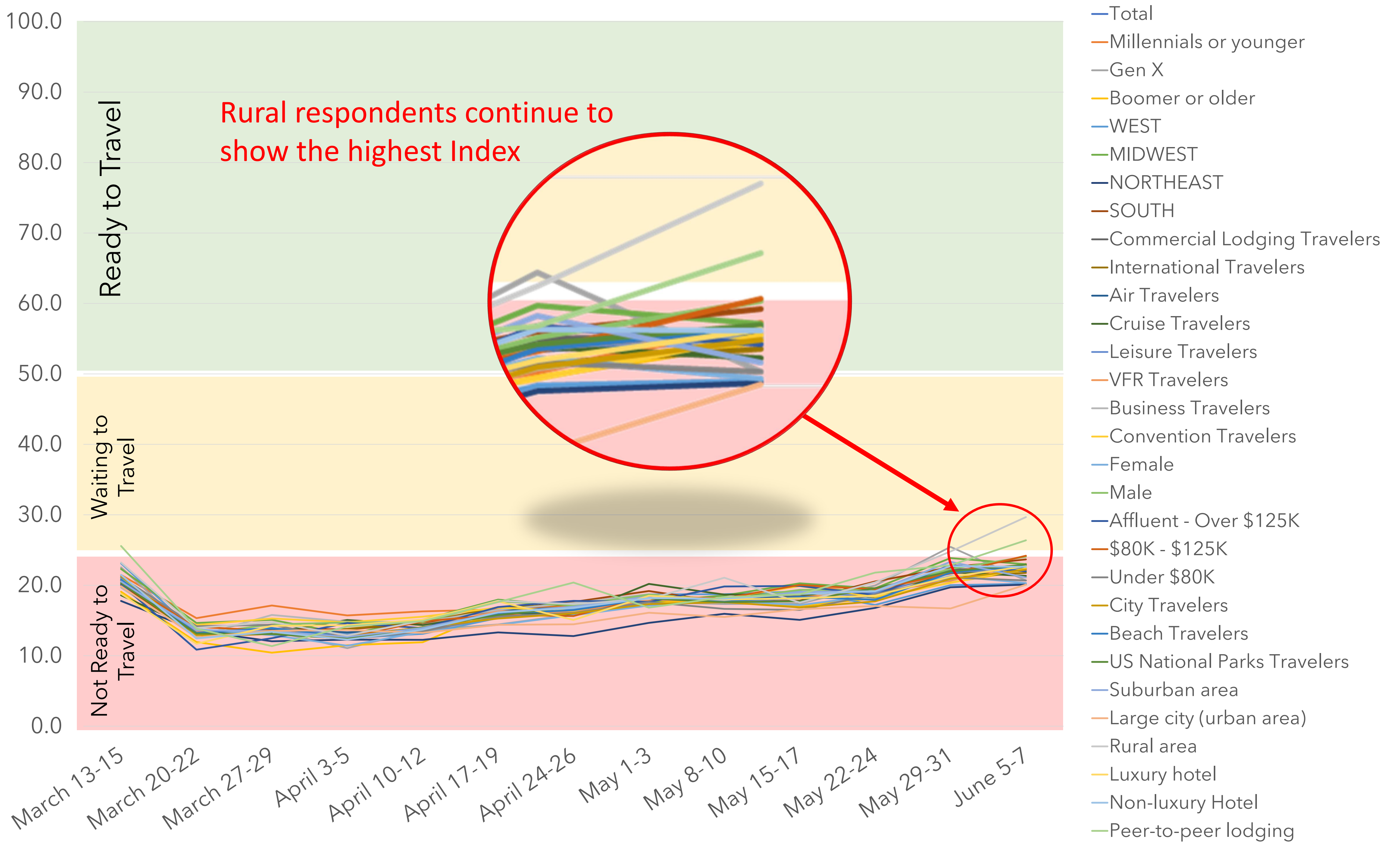




# Travel Outlook

Neutral



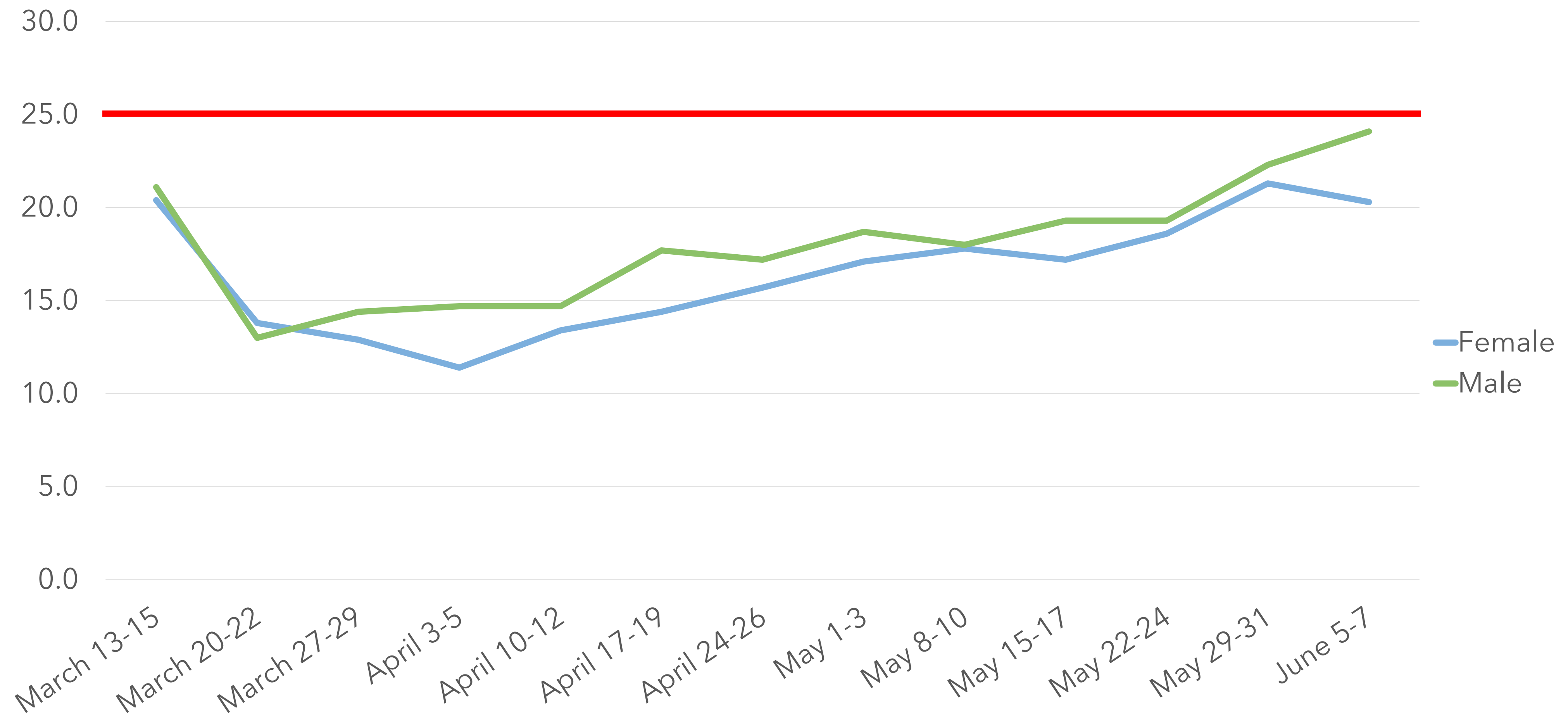




# Gender

## Points of Interest:

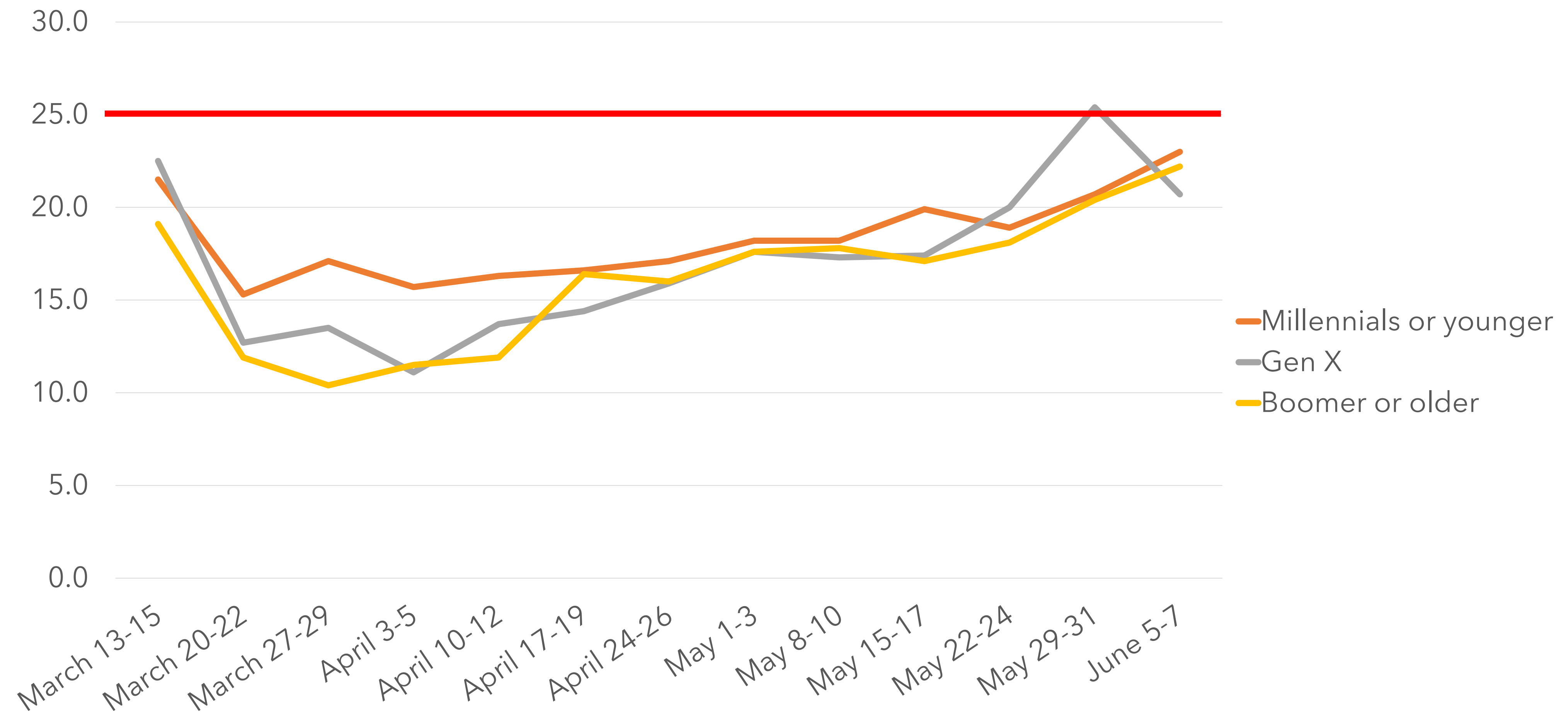
- Safety and financial concerns dropped for Men this week, while concerns for women largely remained consistent with previous weeks.
- Men reported a significant drop in the agreement with the statement, "I'm planning to avoid travel until the Coronavirus situation blows over" (50.6% down from 60.5% last week; top 2 box agreement).



# Generation

## Points of Interest:

- Gen X safety concerns rebounded this week (6.5 out of 10, up from 6.1 last week) while Millennials and Boomers showed modest drops in concern for safety.
- Millennials showed a slight rise in openness to travel messaging while both Gen X and Boomers saw slight drops.

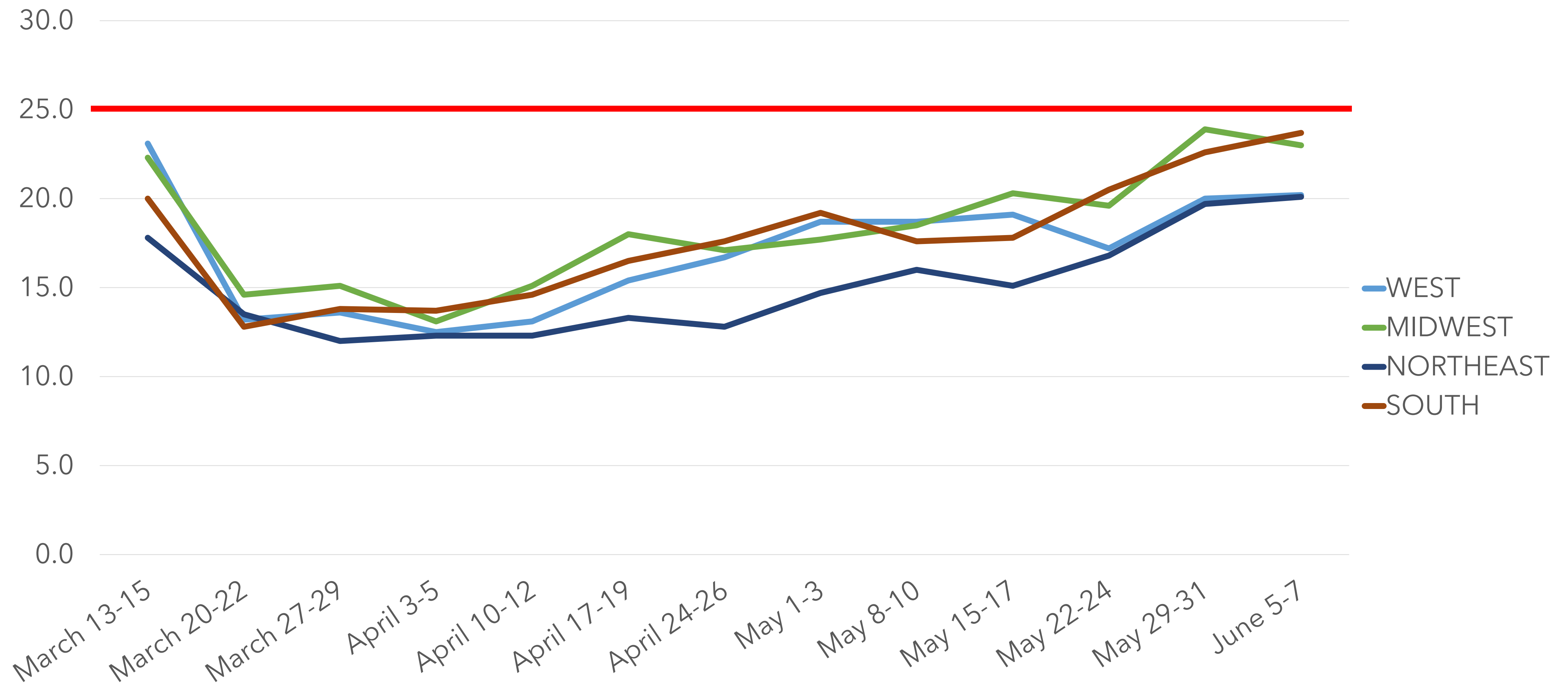




# US Region

## Points of Interest:

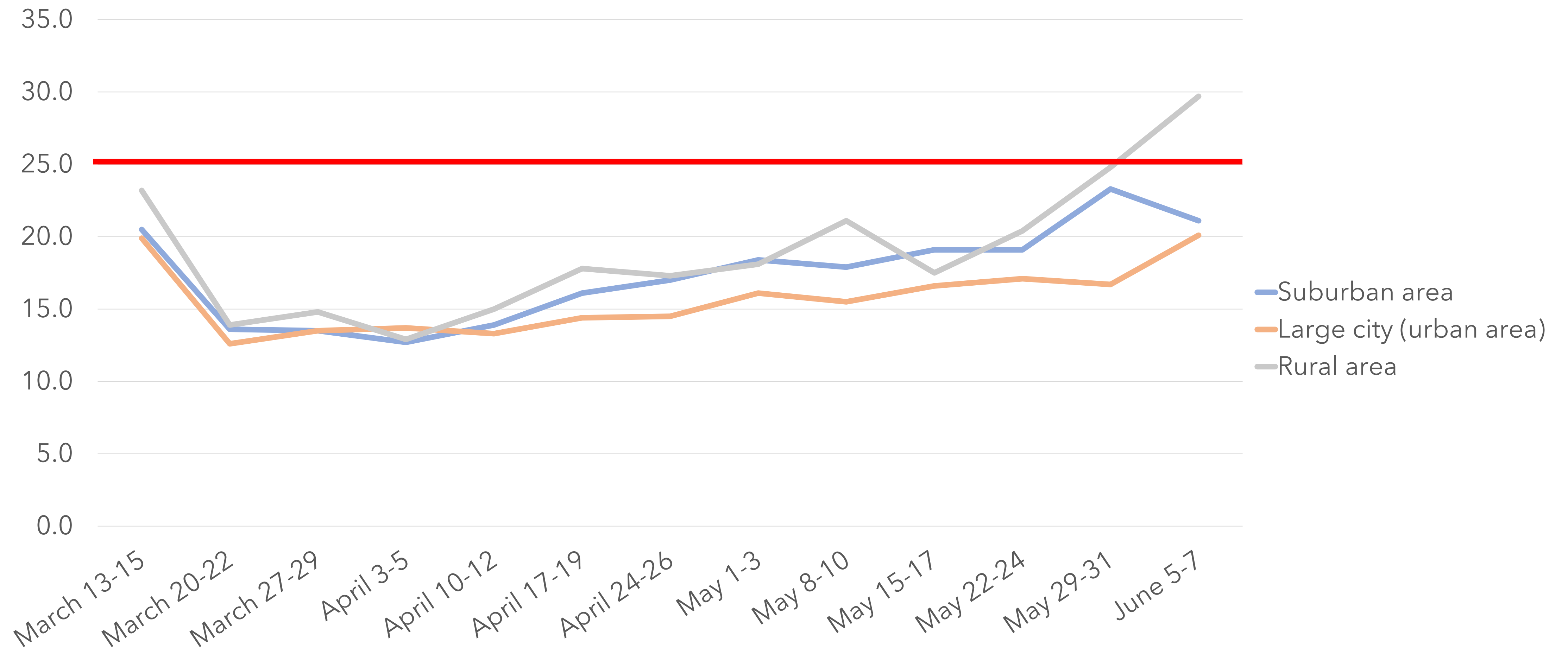
- Safety concerns in all regions except the Midwest showed slight drops this week while financial concerns showed drops most significantly in the South.
- Among all regions the Northeast again showed the most optimism about the coronavirus situation improving in the next month (44.4% up from 34.8% last week think the situation will get better or much better in the next month).



# Type Of Residence

## Points of Interest Impacting Index Scores:

- Safety concerns grew again among Suburban respondents this week while showing drops for Urban and Rural respondents.
- Rural respondents reported modest growth in openness to travel messaging and the relatively highest levels of excitement to travel now.

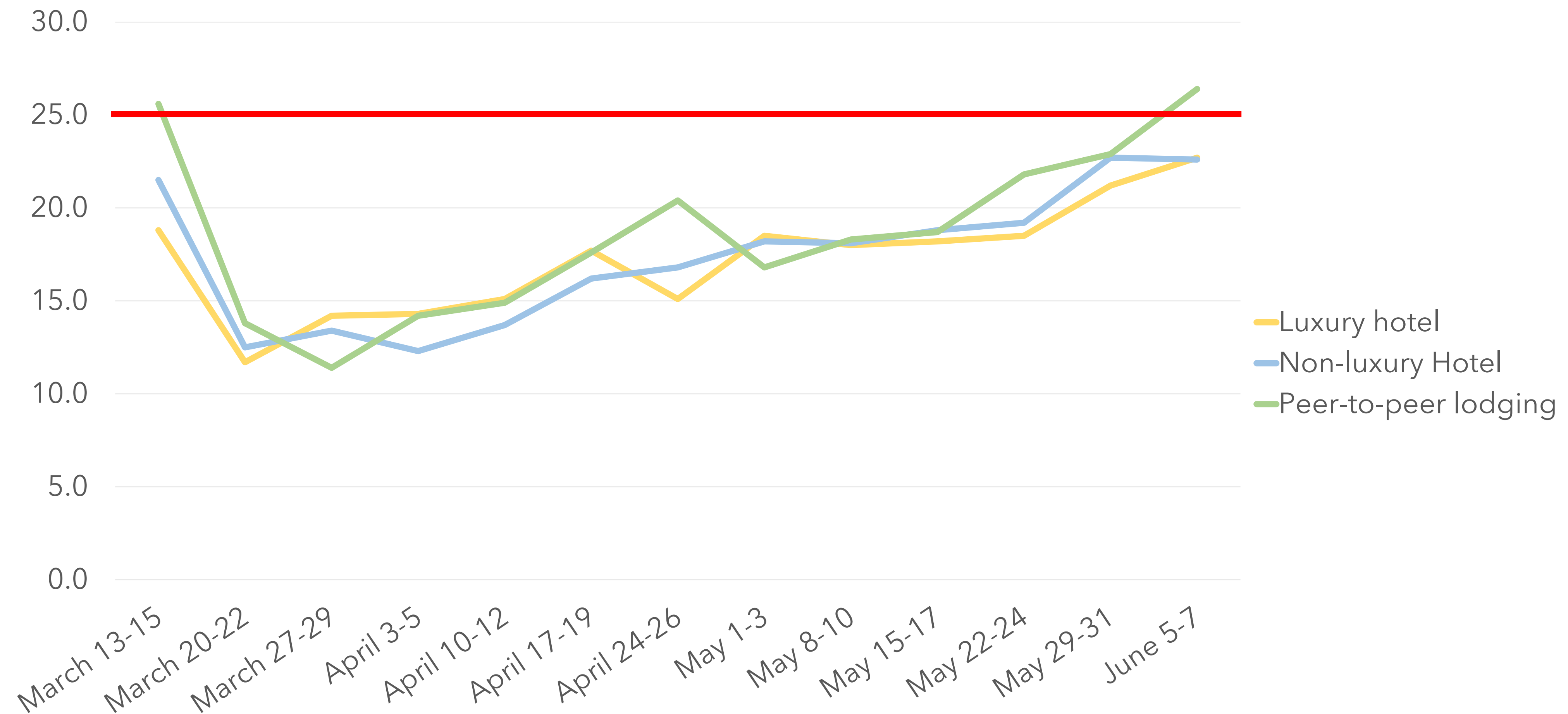




# Lodging Type Used in last 2 years

## Points of Interest:

- Peer-to-peer lodging travelers showed a significant decrease in concerns for personal safety this week (5.9 out of 10, down from 6.6 last week).
- Luxury hotel travelers were most likely to report they planned to travel before the end of 2020.







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- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>



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