

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF MAY 11<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.

---

**Please consider purchasing, subscribing or donating to support this research**  
<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

**THANK YOU IN ADVANCE**



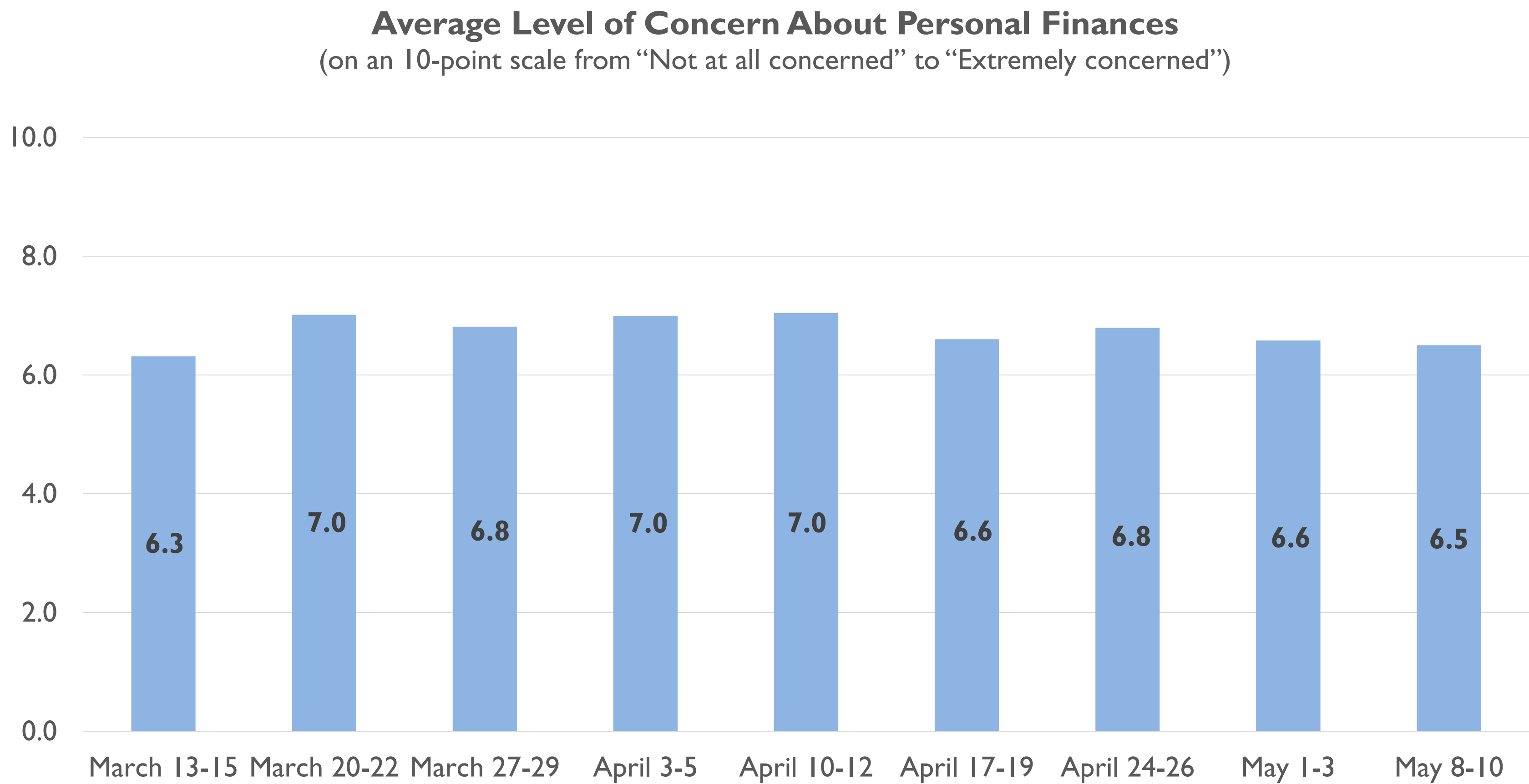


# Key Findings for the Week of May 11<sup>th</sup>

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

# Concerns About Personal Finances

American travelers’ feelings about COVID-19’s impact on their personal finances is at an 8-week low.

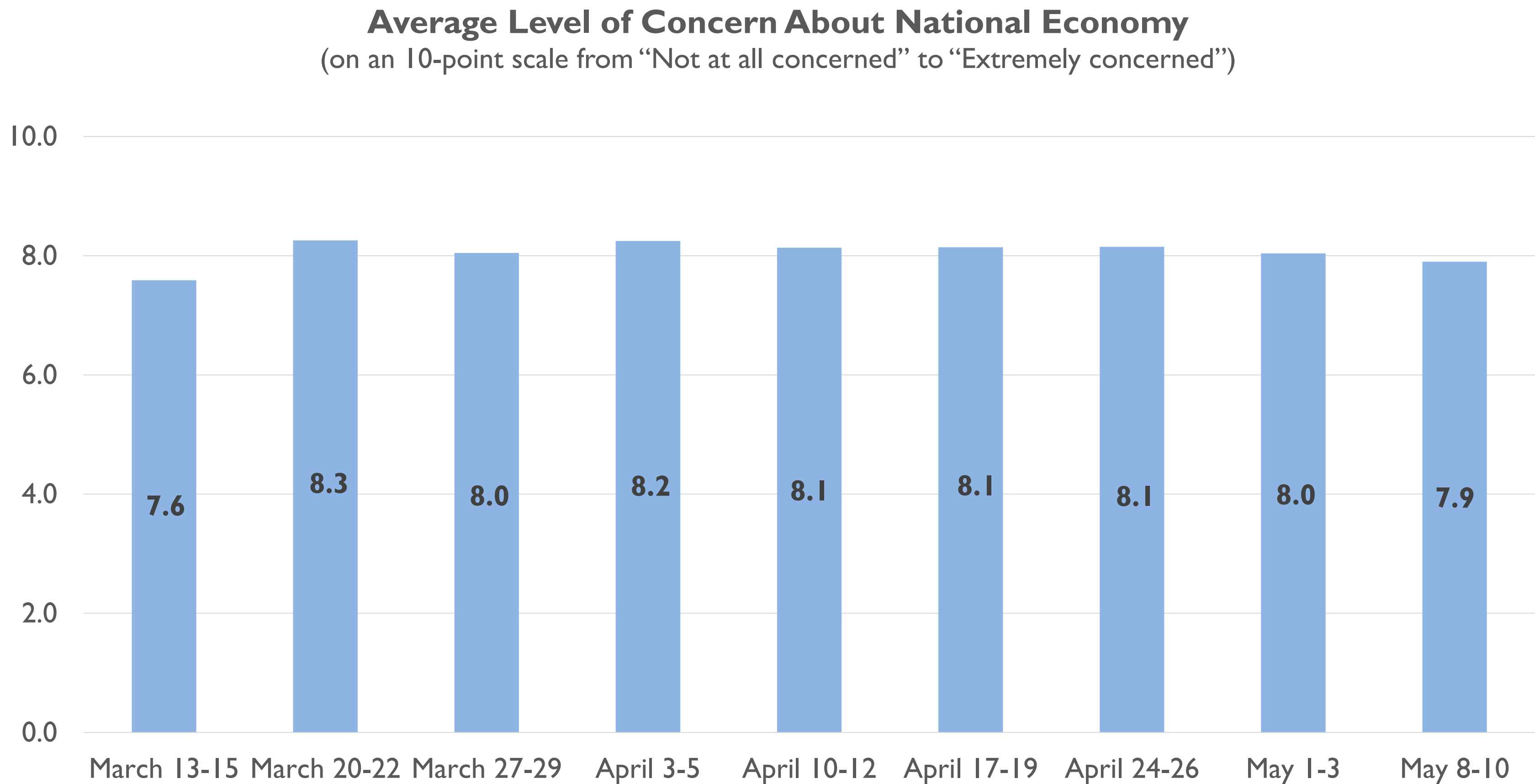


**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?  
(Please answer using the scale below)

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

# Concerns About National Economy

American travelers’ feelings about COVID-19’s impact on the national economy is also at an 8-week low.

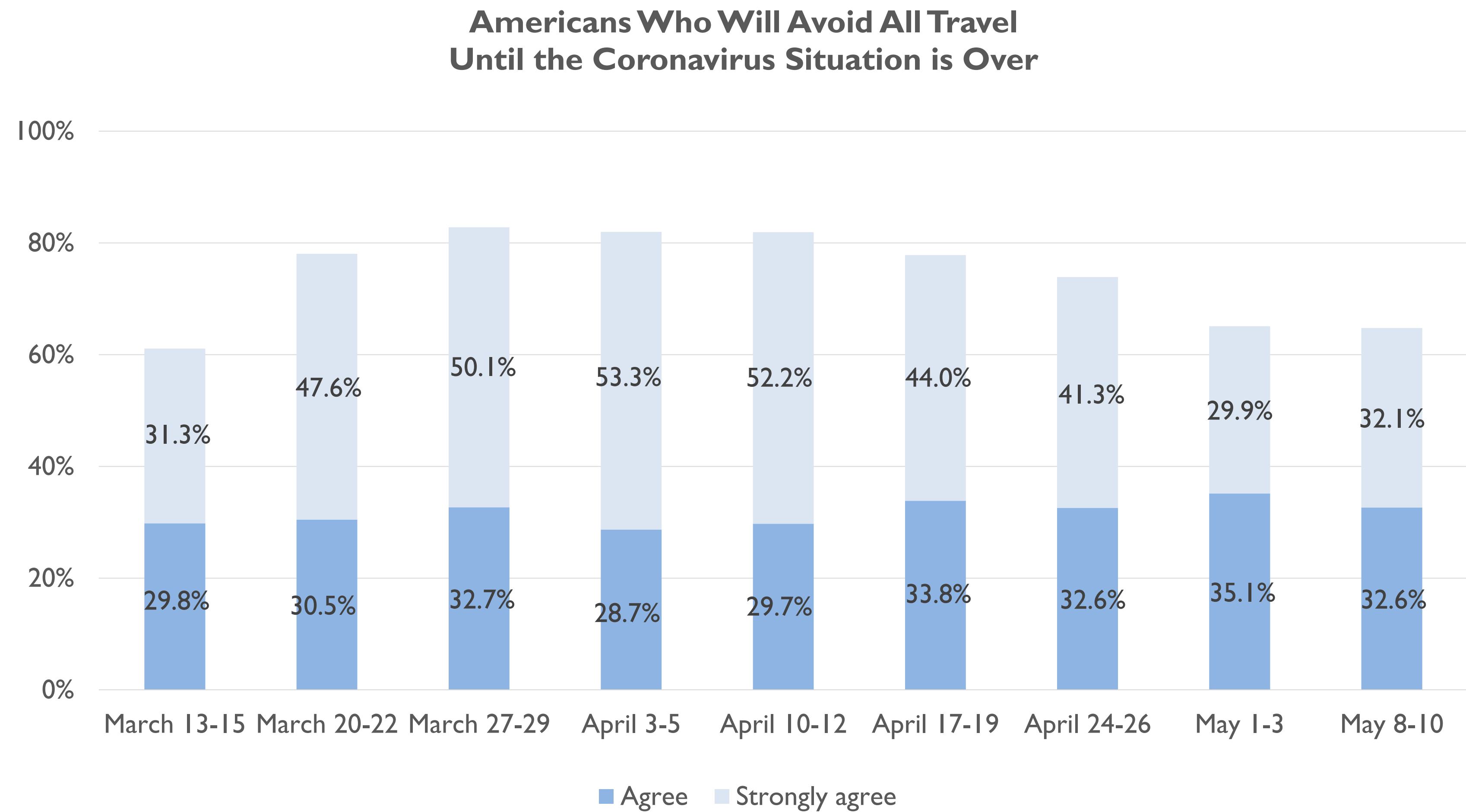


**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?  
(Please answer using the scale below)

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

# Avoiding Travel Until the Crisis Blows Over

Nevertheless, the percent of American travelers who feel they will avoid travel until coronavirus is resolved continues to slowly decline (64.8%).



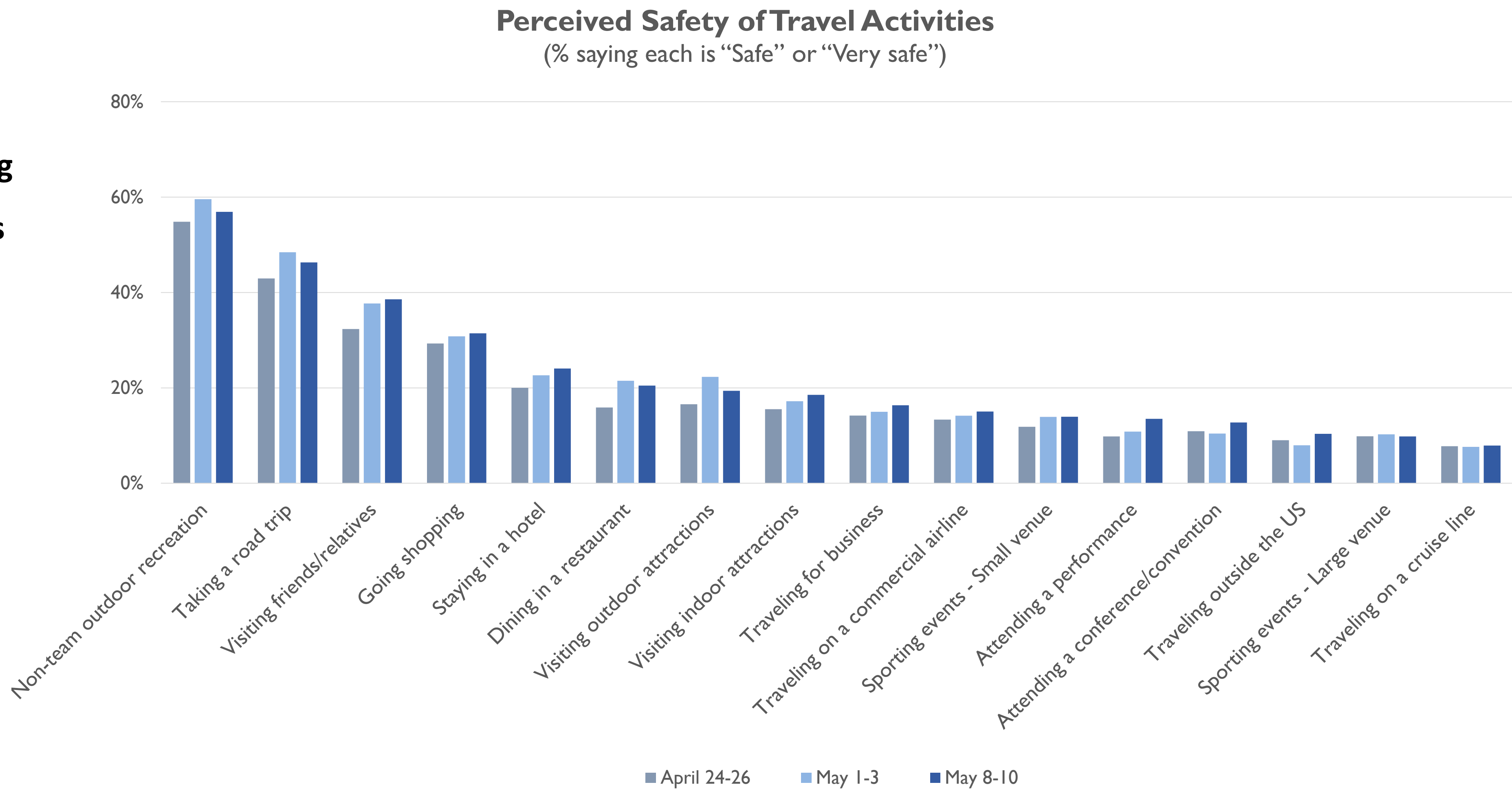
**Question:** How much do you agree with the following statement?  
**Statement:** I'm planning to avoid all travel until the Coronavirus situation blows over.

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



# Perceived Safety of Travel Activities

The perceived safety of flying on a commercial airline, staying in a hotel, dining in restaurants and visiting attractions continues to improve from lows seen in April.



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

(Base: Waves 7-9. 1,208, 1,204 and 1,200 completed surveys. Data collected April 24-26, May 1-3 and May 8-10, 2020)

# Things Travelers Miss

Nearly 7-in-10 American travelers say they miss vacationing a lot--their heart aches for it. Over half say they miss the very act of planning travel.

Question: How much do you miss the following?

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

## How Much Do You Miss the Following? (% Saying “Miss Terribly” or “Miss A Lot”)



Vacations  
(68.4%)



Dining in Restaurants  
(59.9%)



Planning Travel  
(56.1%)



Weekend  
Getaways  
(52.8%)



Live Concert/Musical  
Performance  
(35.1%)



Going to  
Museums  
(33.4%)



Going to Bars  
(32.9%)



Attend Professional  
Sporting Event (30.5%)



Business Trip  
(19.3%)



Going to Conventions  
(16.9%)



# How Will Americans Get Back into Travel?

However, the vast majority of Americans still say they will approach travel with trepidation as they think about starting again.

**Question:** In the period after coronavirus, how are you going to approach getting back into travel? (Pick the image that best describes you)

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



**47.1%**  
*I'll get back in but carefully*

**In the period after coronavirus, how are you going to approach getting back into travel?**



**41.7%**  
*I'll test the waters first*

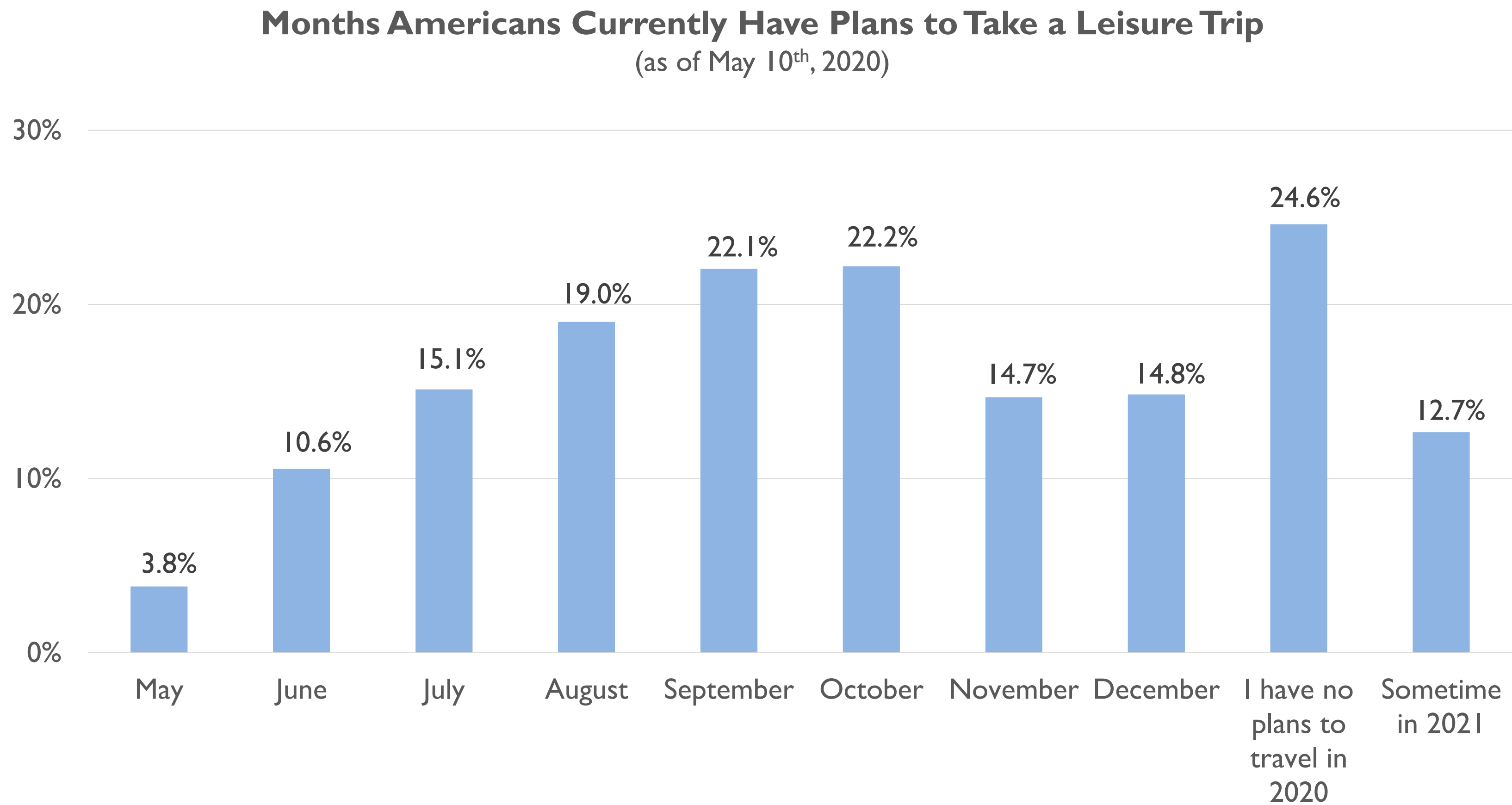


**11.2%**  
*I'll jump right back in*



# Months Americans Currently Have Plans to Take a Leisure Trip

This week, 36.0% of American travelers report having one or more trips planned between now and the end of August.

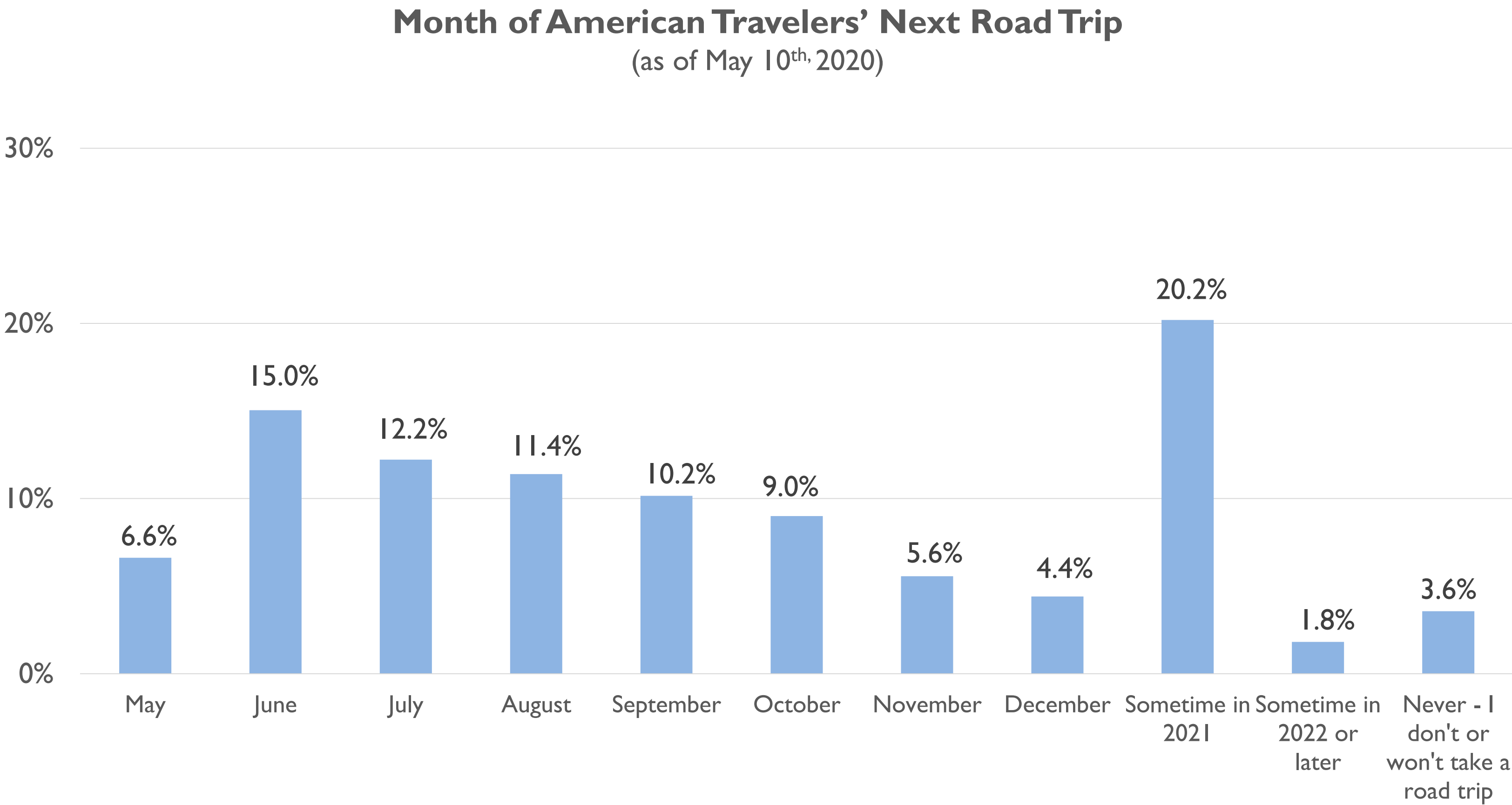


**Question:** Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips? (Select all that apply)

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

# American Travelers' Next Road Trip

But, 45.3% estimate they will end up taking their next road trip in this same period (and 20.1% their next air trip), suggesting higher trip volumes potentially on the horizon.

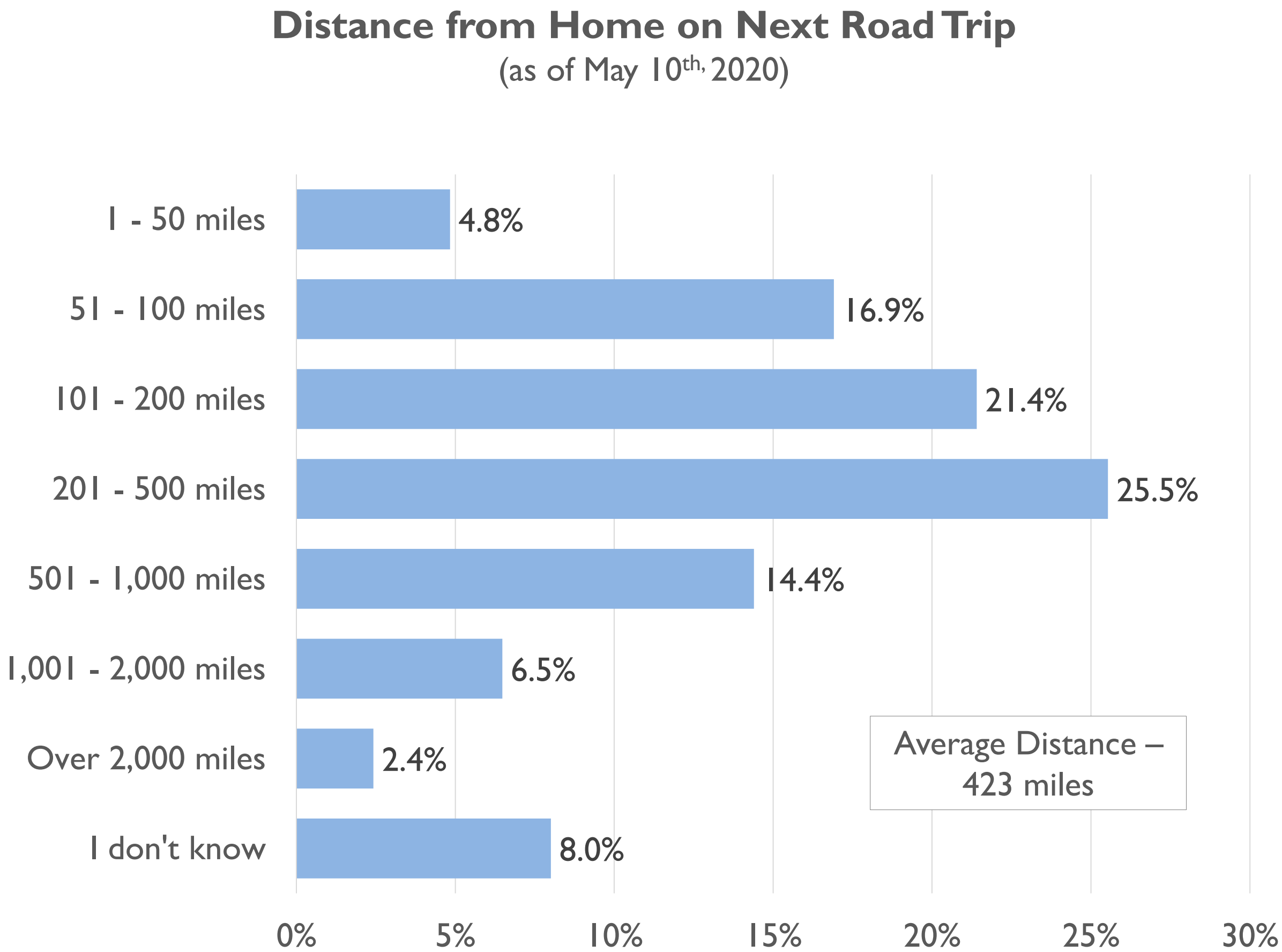


**Question:** In what month do you expect you will take your NEXT ROAD TRIP (traveling in a personal automobile)?

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

# Distance from Home on Next Road Trip

Americans estimate the distance of their next road trip to be 423 miles on average, although 43.2% report it will be under 200 miles.



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

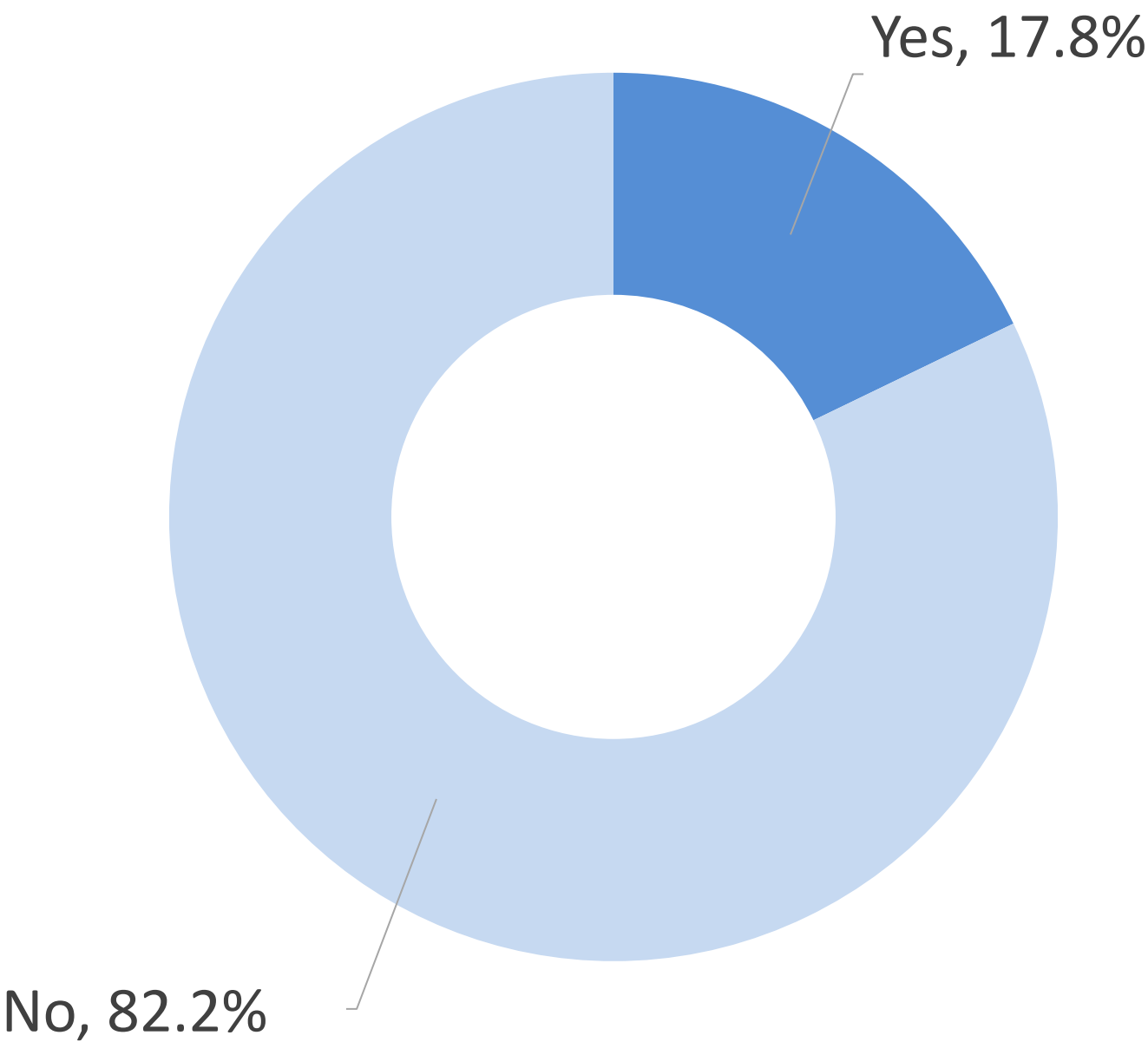
(Base: Wave 9. 1,200 completed surveys. Data collected May 8-10, 2020)



# Recall of Advertising & Feelings About Advertising

This week, 17.8% of American travelers recall seeing a travel destination ad within the past month and 56.3% say the most recent travel ad they saw made them feel happy.

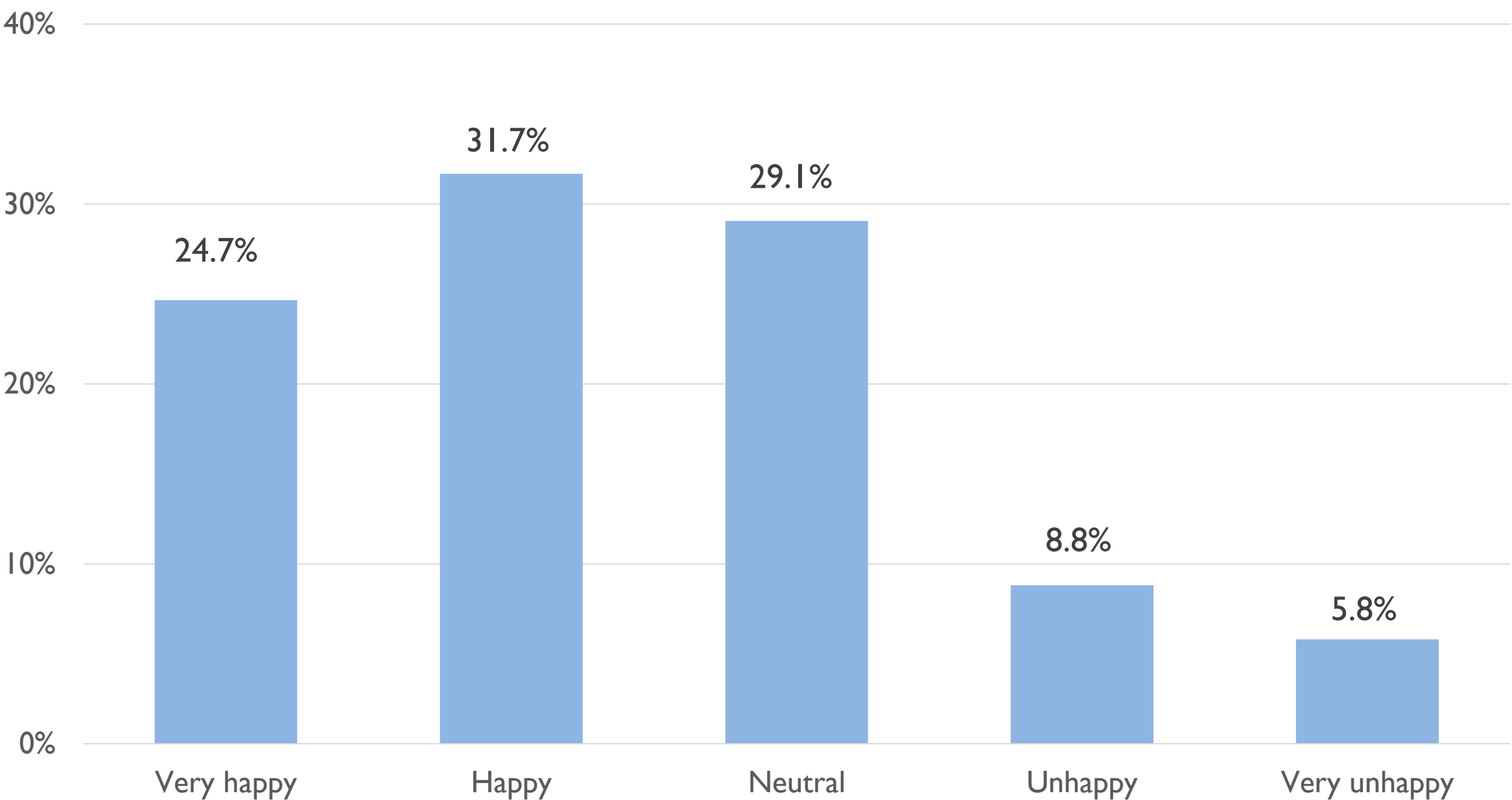
Recall of Destination Advertising



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

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

Feelings About Most Recent Advertisement Seen















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

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

# Receptivity to Advertising Channels

## Where Are You Most Receptive to Learning about Travel Destinations Right Now?

Over 85 percent of Millennial and GenZ travelers--and 7-in-10 GenX and Boomer travelers—cite a digital resource as where they will be most receptive to travel messaging reaching them, with social media powerhouses like Instagram and Facebook, as well as search engine marketing, appearing the likeliest means for meeting travelers where they are.

	Millennial/GenZ	GenX	Baby Boomers
 Instagram	32.7%	12.9%	5.8%
 Facebook	25.5%	20.7%	15.2%
 Websites found via Search Engine	20.4%	33.5%	40.1%
 Online Articles/Blogs	18.6%	19.6%	20.7%
 TikTok	16.6%	2.0%	0.8%
 Ads around the Internet	16.6%	16.5%	19.0%
 Email	16.1%	25.8%	30.6%
 Twitter	15.9%	6.3%	3.3%
 Pinterest	15.4%	5.5%	4.5%
 Text Messages	13.7%	7.3%	3.2%
 Digital Influencers	8.4%	4.2%	1.0%
 Apps	7.6%	4.3%	2.7%
None of these	14.1%	29.8%	25.8%

**Question:** Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?













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



# Single Best Way to Reach Travelers

Email also looks to be one of the best ways to reach all ages of travelers in a state of openness to travel messaging.

Which would be the **SINGLE BEST WAY** a travel destination could reach you right now?

	Millennial/GenZ	GenX	Baby Boomers
 Email	13.5%	23.2%	31.1%
 Websites found via Search Engine	11.5%	17.6%	17.2%
 Facebook	8.3%	10.6%	7.2%
 Instagram	14.0%	3.2%	1.8%
 Ads around the Internet	6.8%	7.5%	5.9%
 Online Articles/Blogs	6.0%	5.2%	6.2%
 TikTok	8.4%	0.9%	0.2%
 Text messages	3.8%	1.8%	2.5%
 Twitter	4.7%	0.9%	0.6%
 Pinterest	3.6%	1.2%	1.0%
 Apps	2.4%	0.7%	1.8%
 Digital Influencers	2.0%	1.7%	0.4%
None of these	15.1%	25.4%	24.1%

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

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

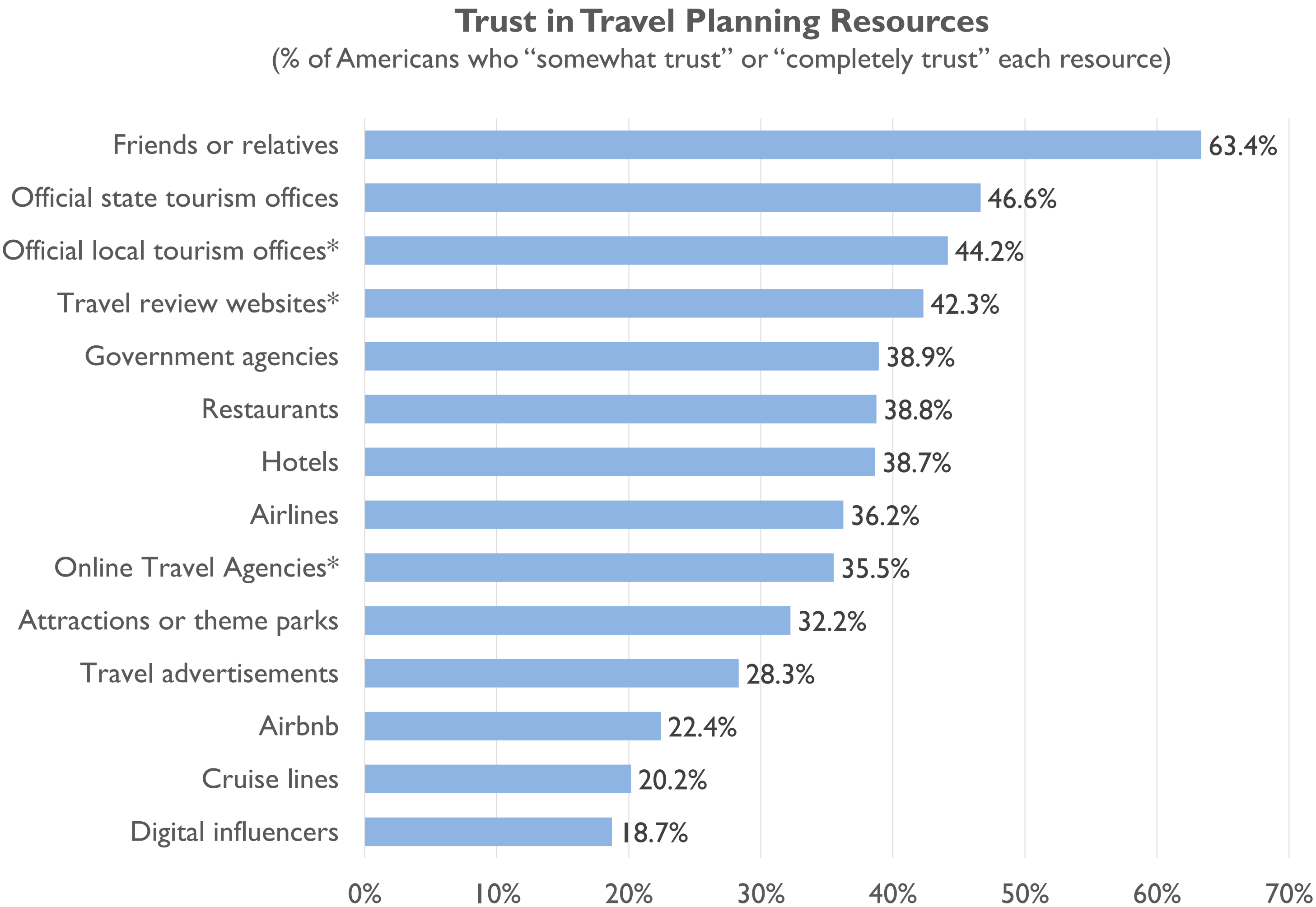


# Planning Resources & Trust

**Travelers are exhibiting strong trust in official destination marketing organizations.** When asked about the resources they would trust to provide the information needed to travel safely, official state tourism offices and local visitors bureaus were cited second behind friends and family.

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

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



*\*Concept explained to respondents in the survey questionnaire*

# Emotional Reactions to Pandemic Mitigation Activity

In reaction to new safety protocols being introduced, seeing crews disinfecting an airplane, temperature checks being performed at airports and masks on restaurant staff largely increase travelers’ feelings of personal safety; although they stimulate some anxiety, as well.

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

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

## Feelings About Safety Protocols



**Crew Disinfecting an Airplane**

Makes Me Feel:  
**Safe (63.6%)**  
**Anxious (21.7%)**



**Temperature Checks at Airports**

Make Me Feel:  
**Safe (56.2%)**  
**Anxious (30.0%)**



**Servers in a Restaurant Wearing Masks**

Make Me Feel:  
**Safe (48.8%)**  
**Anxious (25.3%)**





# Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

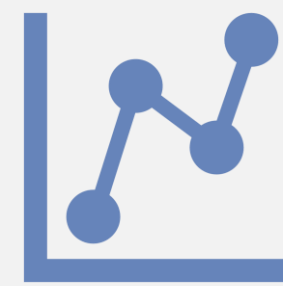
Highlights from the Week of May 11th



# What is a Predictive Index?



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



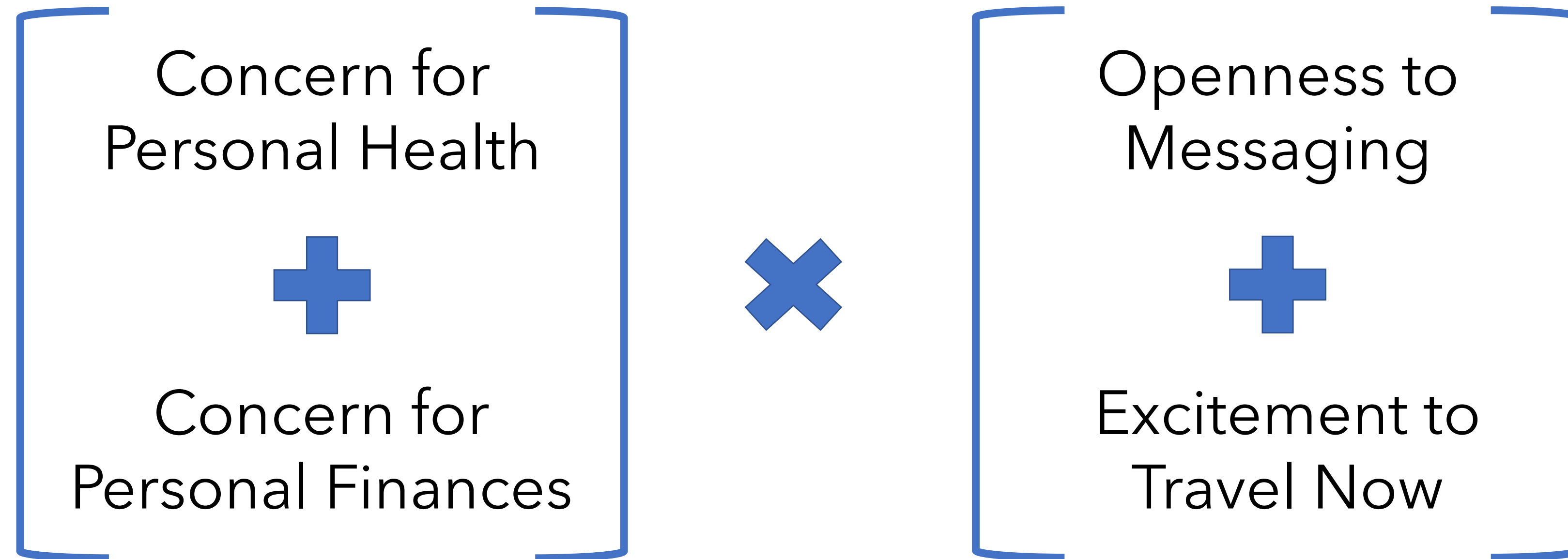
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

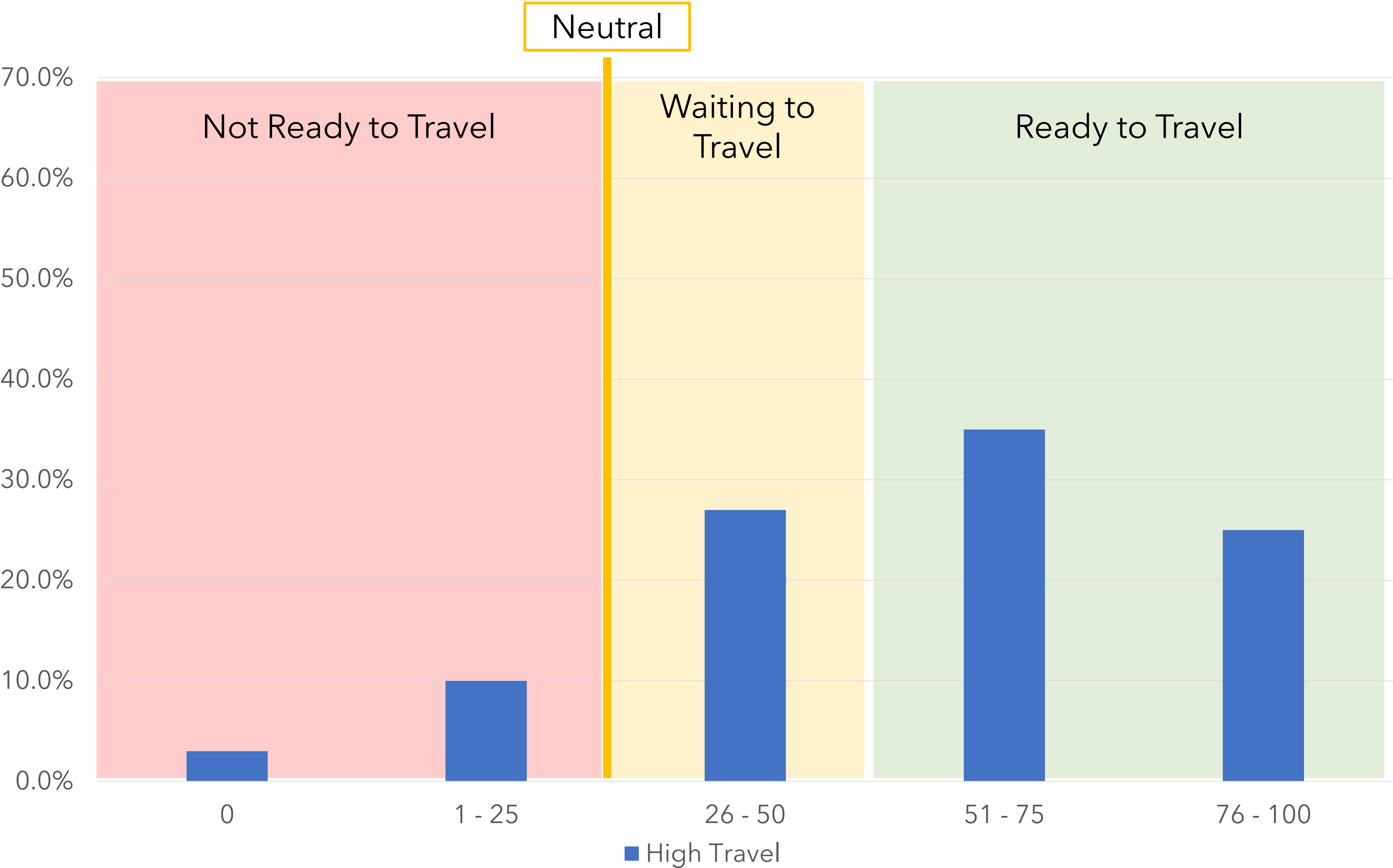
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

# Predictive Index Formula



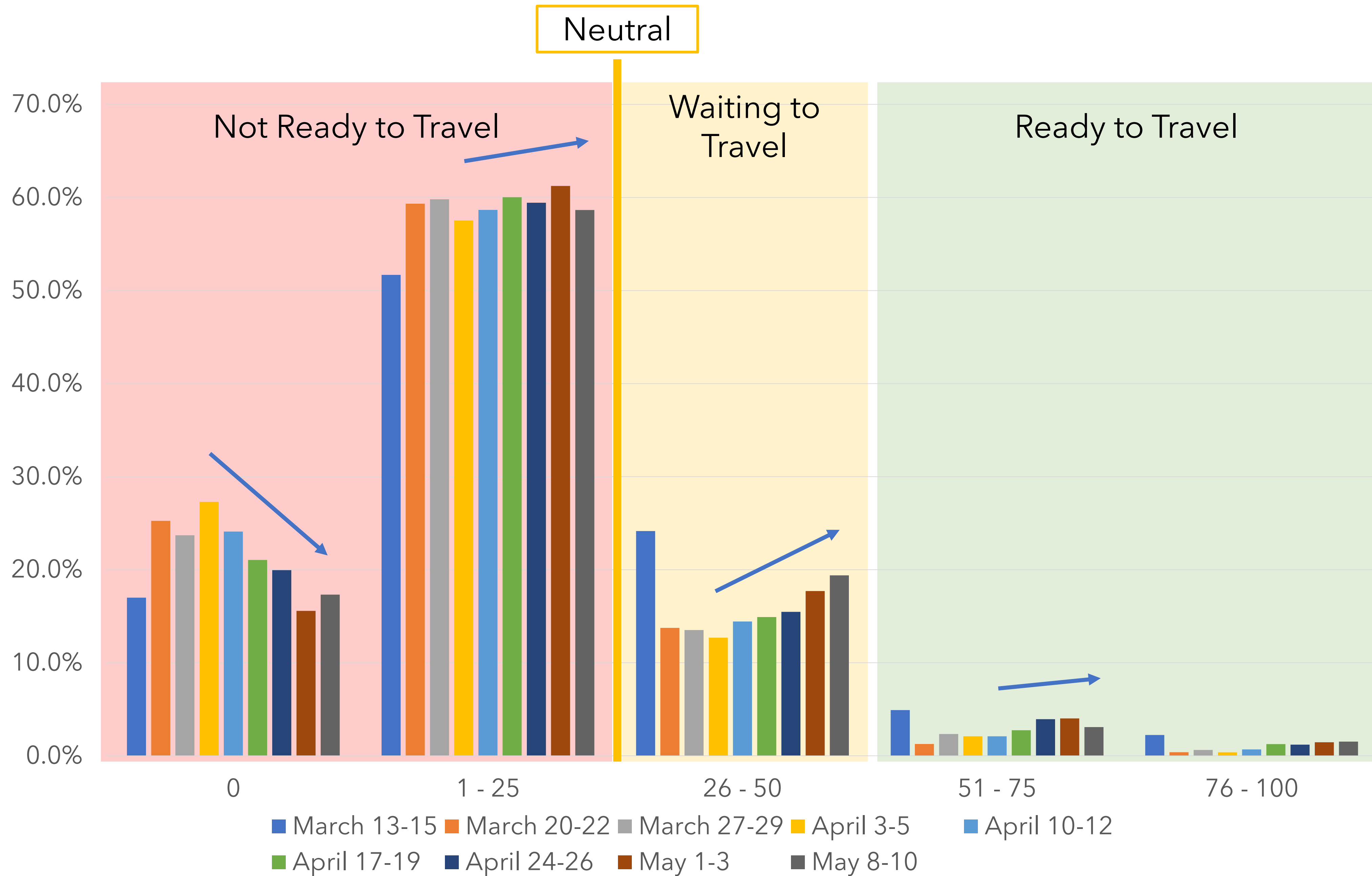
\*Normalized to a 100pt scale

# Healthy Travel Outlook





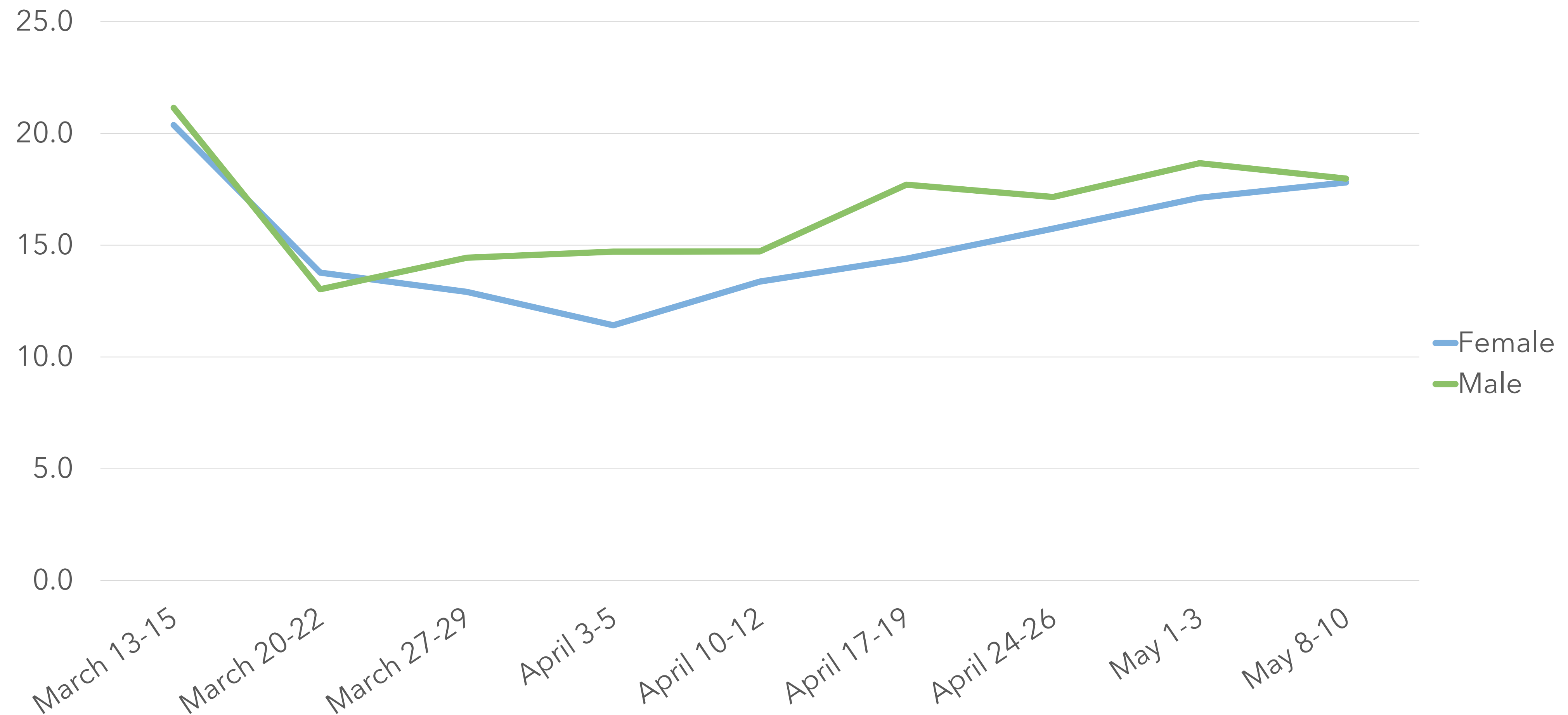
# Travel Outlook: Week of May 11<sup>th</sup>



# Gender

## Points of Interest Impacting Index Scores:

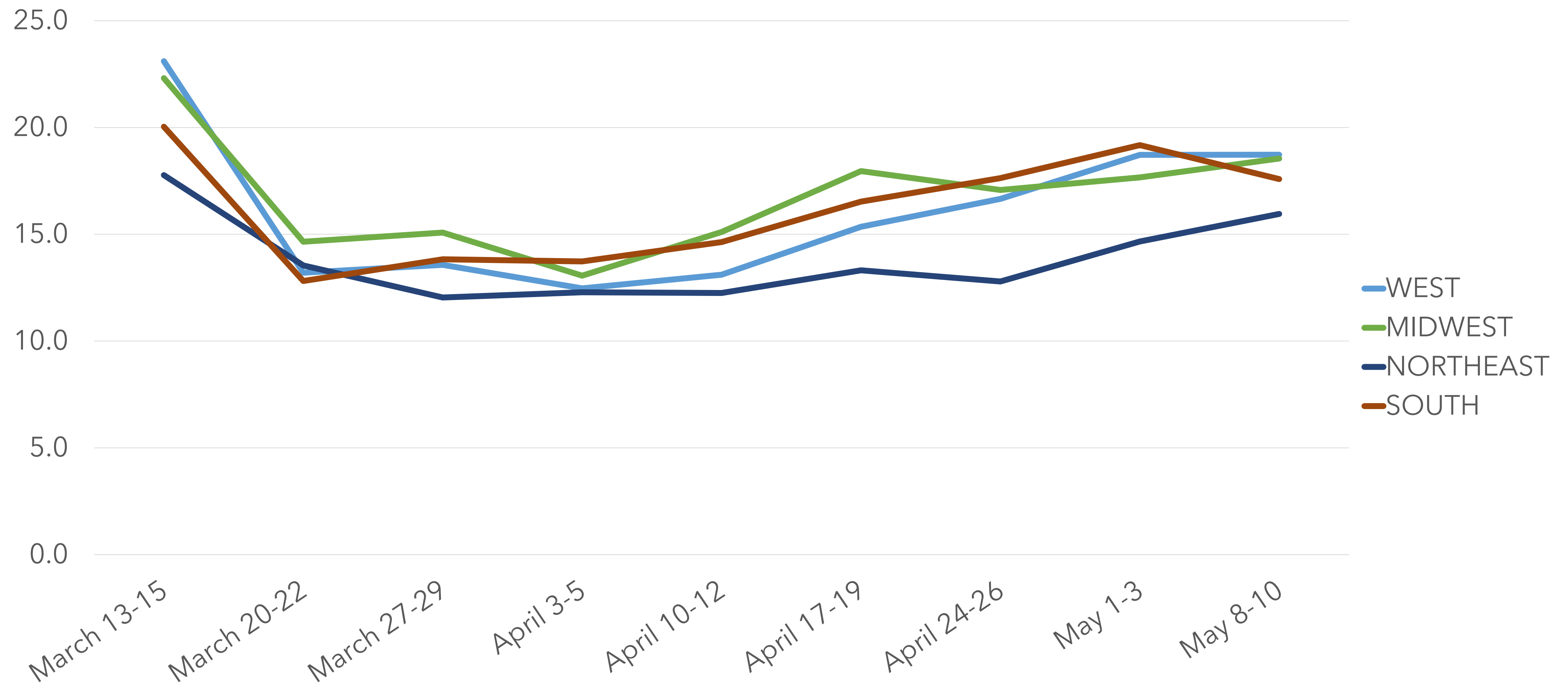
- Men and Women reported near identical levels of both safety and financial concerns this week as well as similar levels of excitement to travel.
- Men more likely to say they will “Jump right back in” to travel in the period right after the coronavirus. (14.1% vs 8.9% for women)



# US Region

## Points of Interest Impacting Index Scores:

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

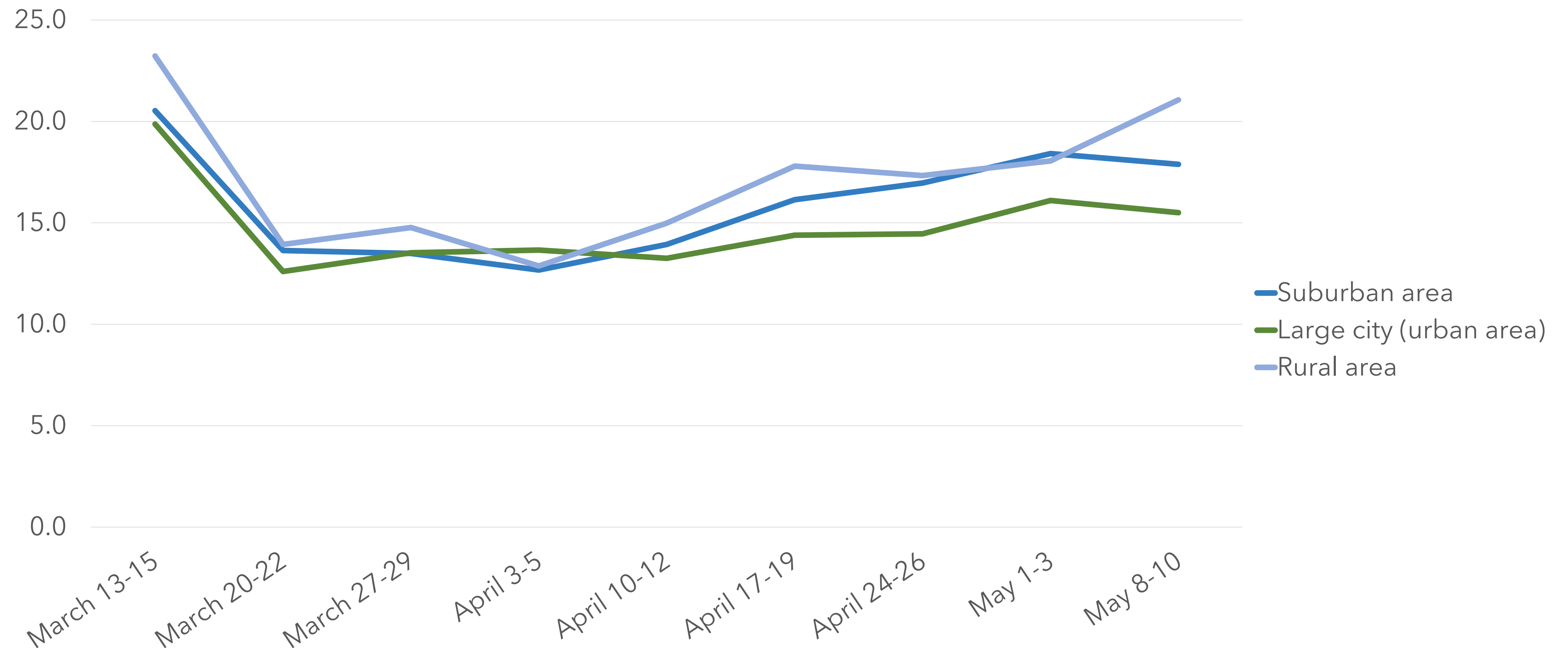




# Type Of Residence

## Points of Interest Impacting Index Scores:

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







Questions?  
Need More  
Information?

- We're here for you. Please email us at [info@destinationanalysts.com](mailto:info@destinationanalysts.com).
- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>