

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF MAY 18TH, 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

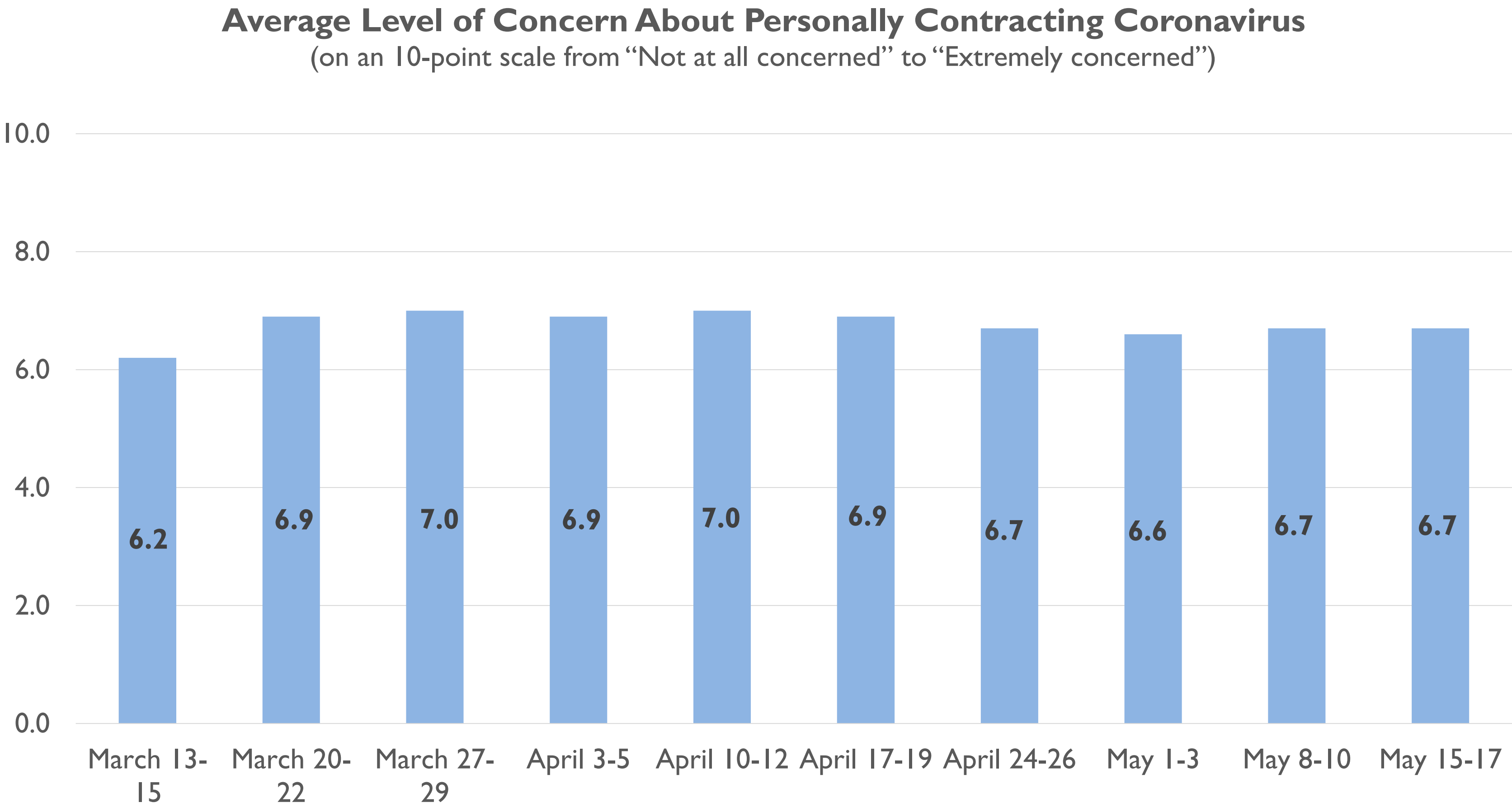
A woman with blonde hair and a man with dark hair are sitting at a table, both wearing white face masks. The woman is on the left, holding a glass of orange juice with a straw. The man is on the right, with his hands clasped on the table. The background is a textured blue wall.

Key Findings for the Week of May 18th

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Personal Health Concerns

American travelers are demonstrating increased comfort with, or in spite of, their concerns surrounding COVID-19. Personal concerns about contracting the virus remained constant over the last two weeks.

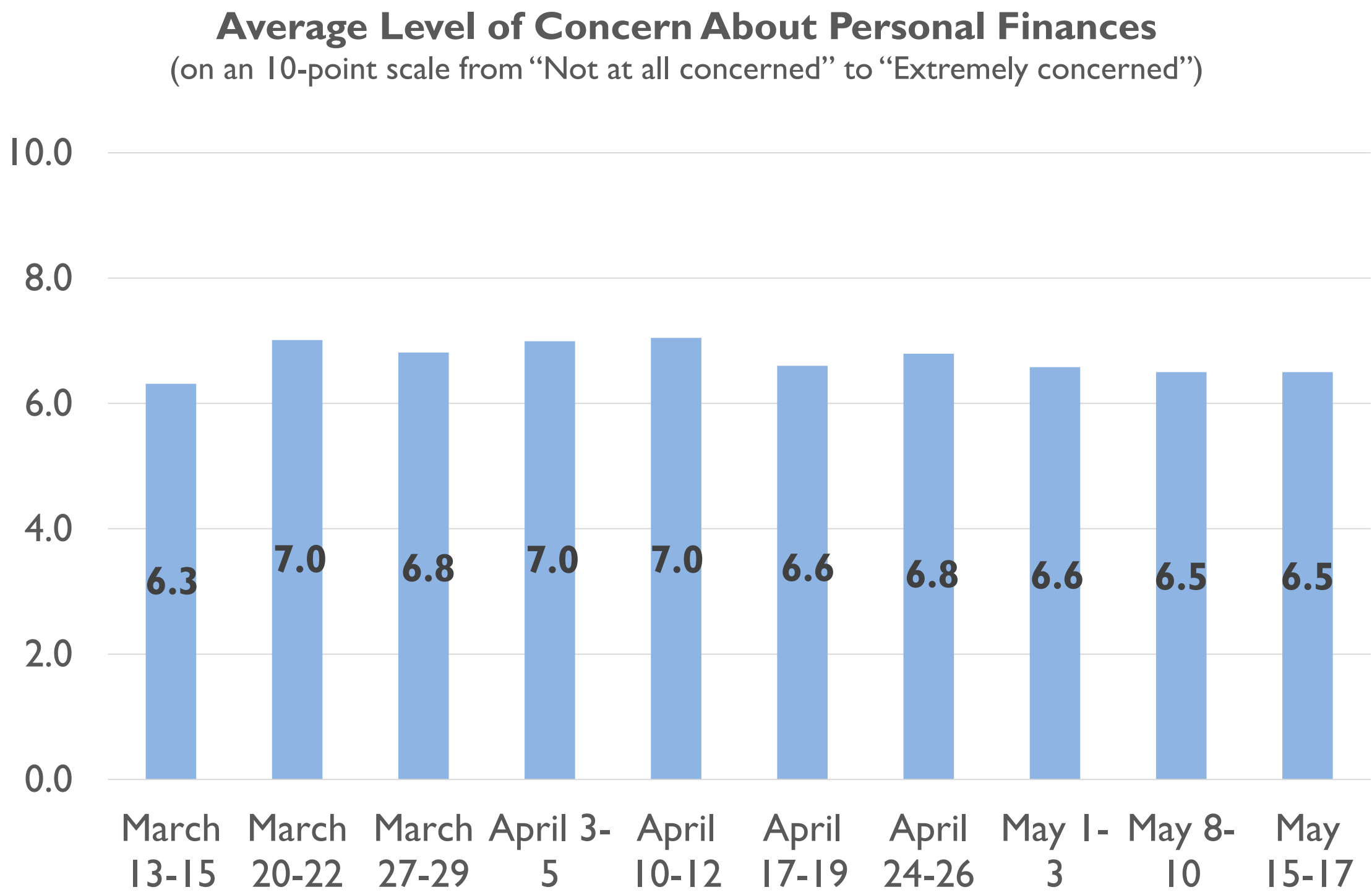


Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200 and 1,212 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 and 15-17, 2020)

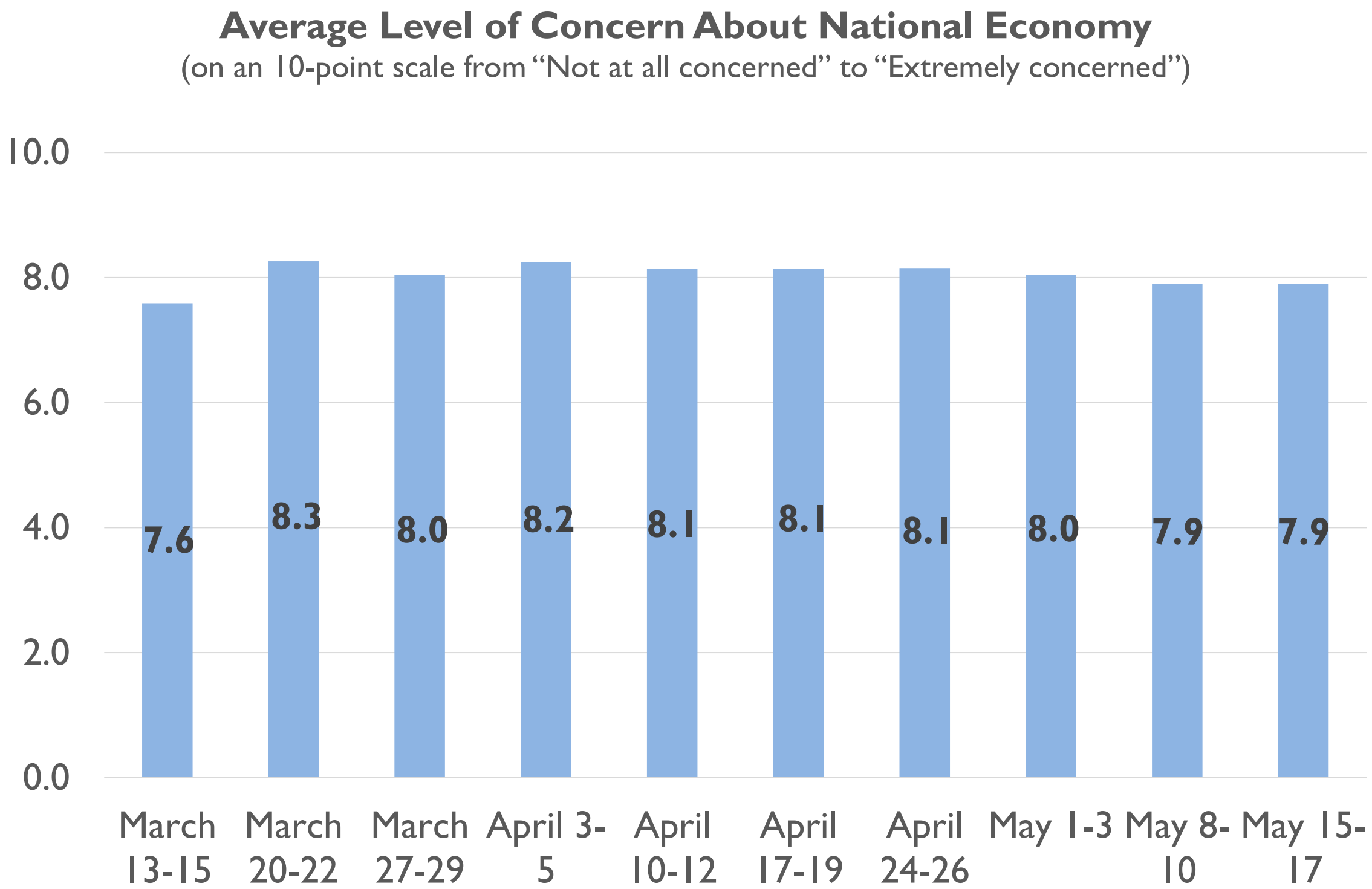
Concerns About Personal Finances & National Economy

Concerns about the virus’ impact on personal finances and the national economy also remained constant over the last two weeks.



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, 1,200 and 1,212 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 and 15-17, 2020)

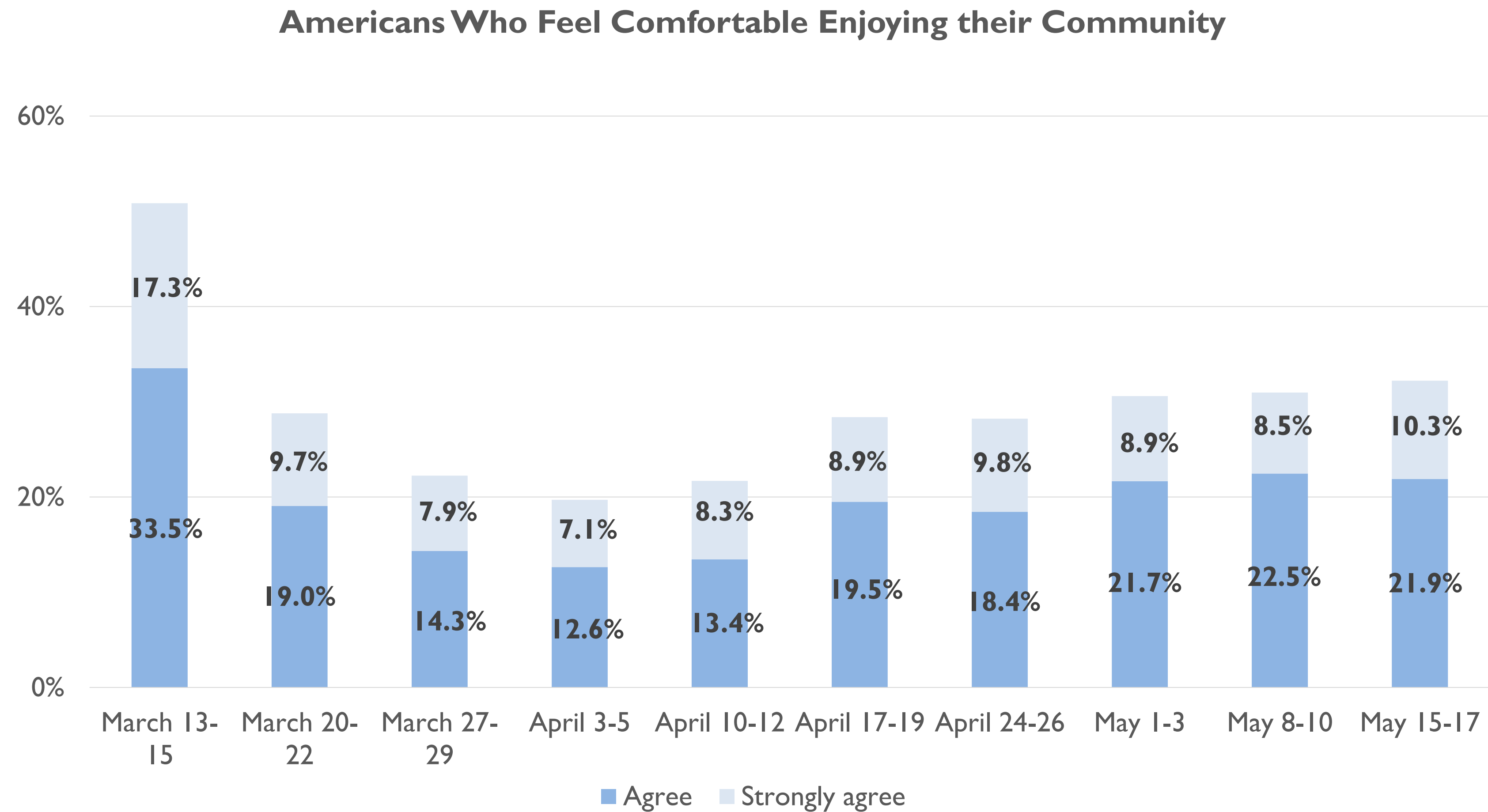


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the **NATIONAL ECONOMY**? (Please answer using the scale below)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200 and 1,212 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 and 15-17, 2020)

Comfort Enjoying Home Community

The proportion of Americans comfortable going out to engage in activities in their own community is at a 9-week high (32.2%).

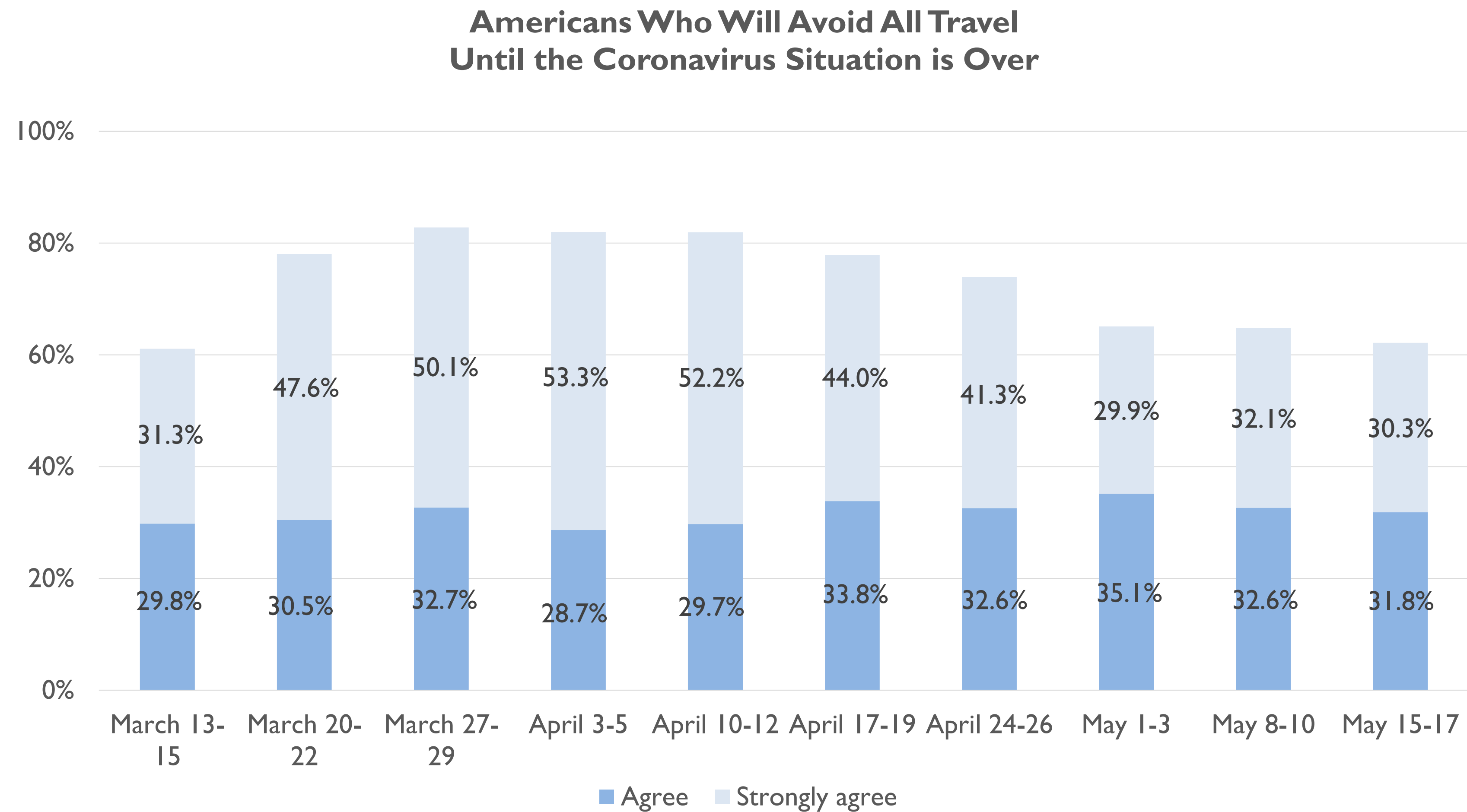


Question: How much do you agree with the following statement?
Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200 and 1,212 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 and 15-17, 2020)

Avoiding Travel Until the Crisis Blows Over

The percent saying they are avoiding travel until the coronavirus situation is over has fallen back to the level it was March 15th.

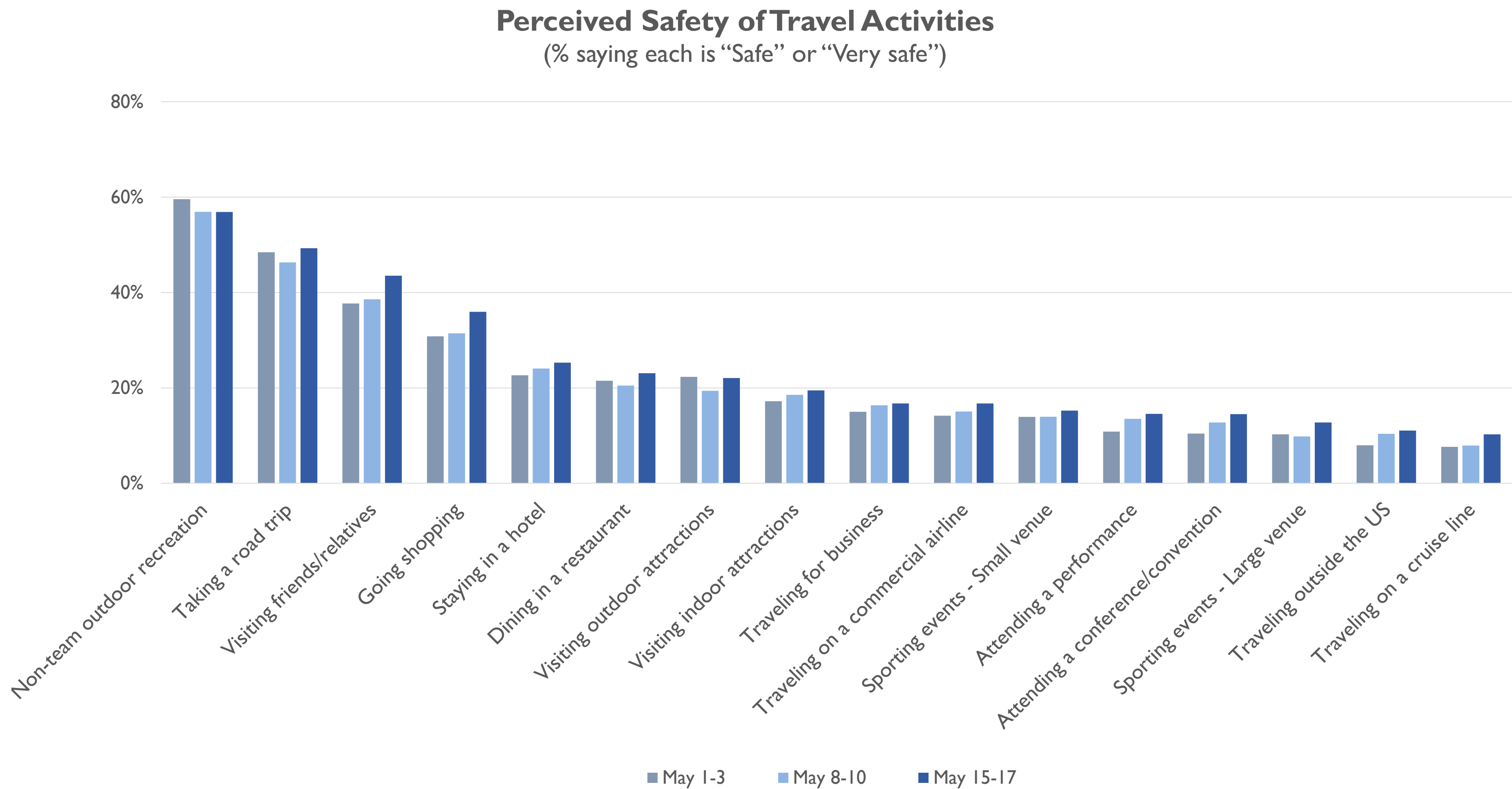


Question: How much do you agree with the following statement?
Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200 and 1,212 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 and 15-17, 2020)

Perceived Safety of Travel Activities

Increasing numbers of Americans are feeling it's safe to go shopping (36.0%), visit friends and relatives (43.5%), take a road trip (49.3%) and engage in (non-team) outdoor recreational activities (56.9%).



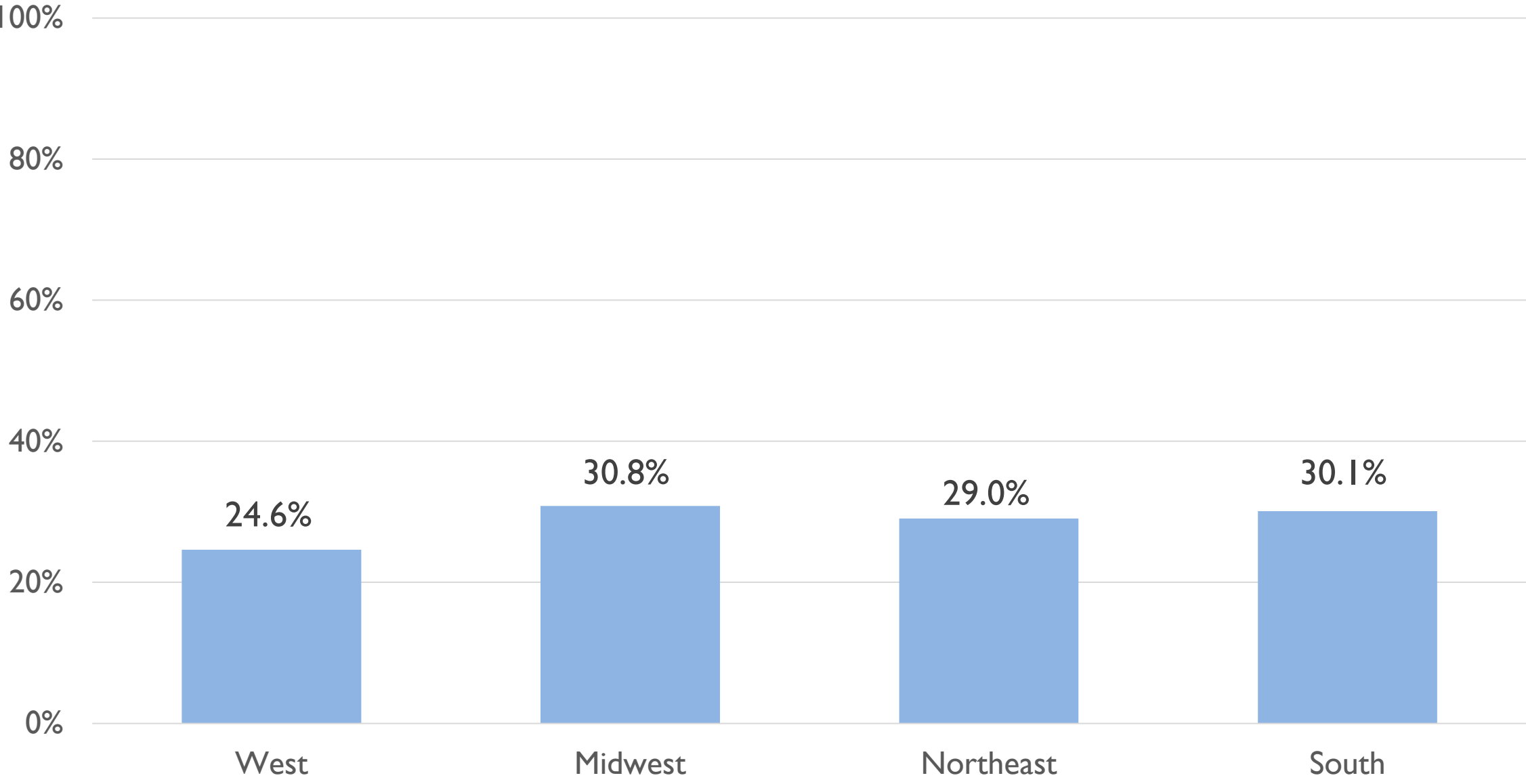
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 8-10. 1,204, 1,200 and 1,212 completed surveys. Data collected May 1-3, 8-10 and 15-17, 2020)

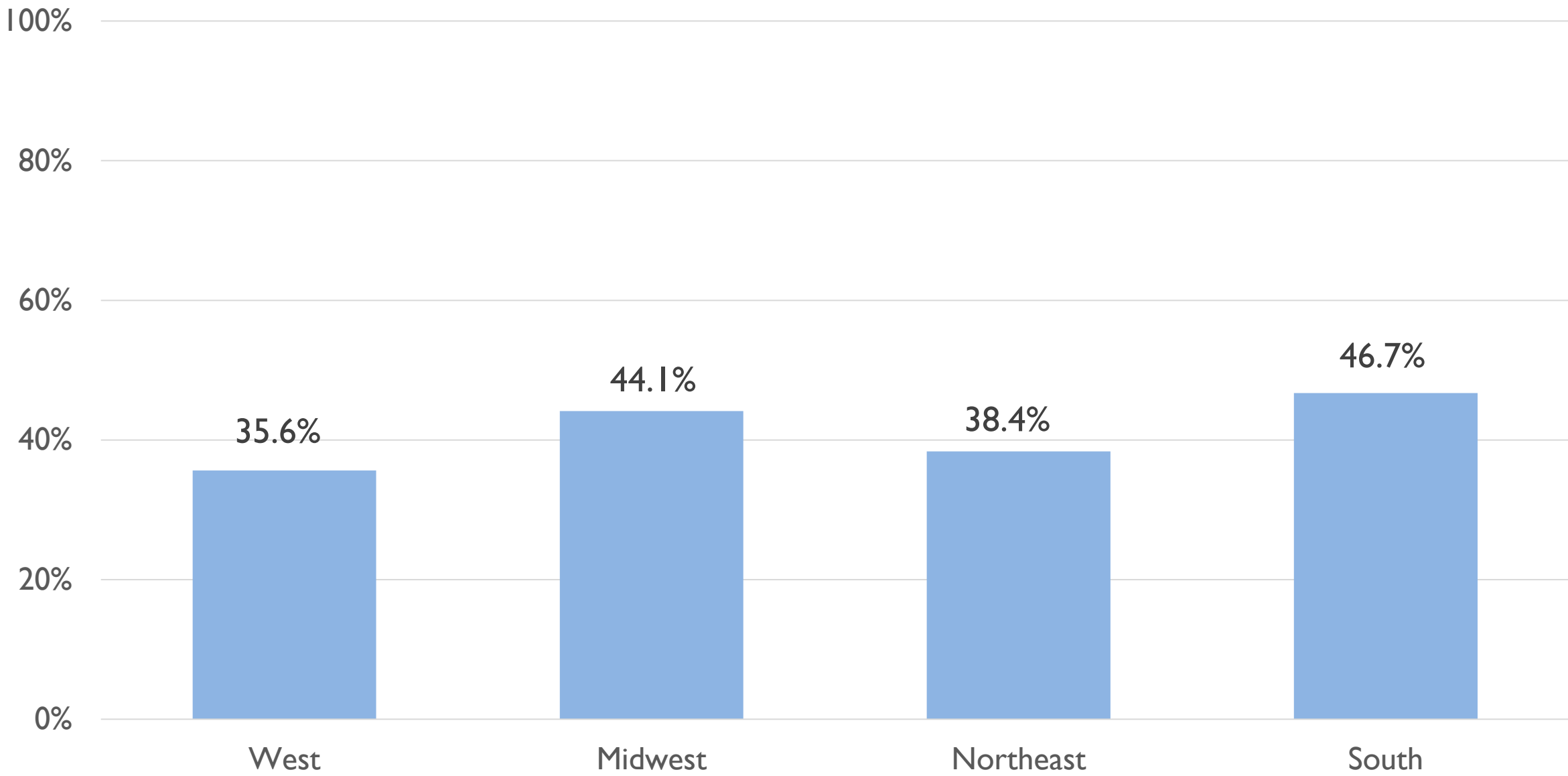
Expectations of the Situation and Travel in the Fall

Of course, feelings about the virus and travel are not uniform. Travelers in the Midwest and South are most optimistic that the coronavirus situation will stay the same or improve in the next month and demonstrate the most agreement that they will be traveling in the Fall.

Americans Who Expect the Coronavirus Situation Will Get Better in the Next Month—by U.S. Region



Americans Who Expect to Travel in Fall 2020—by U.S. Region



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 _____

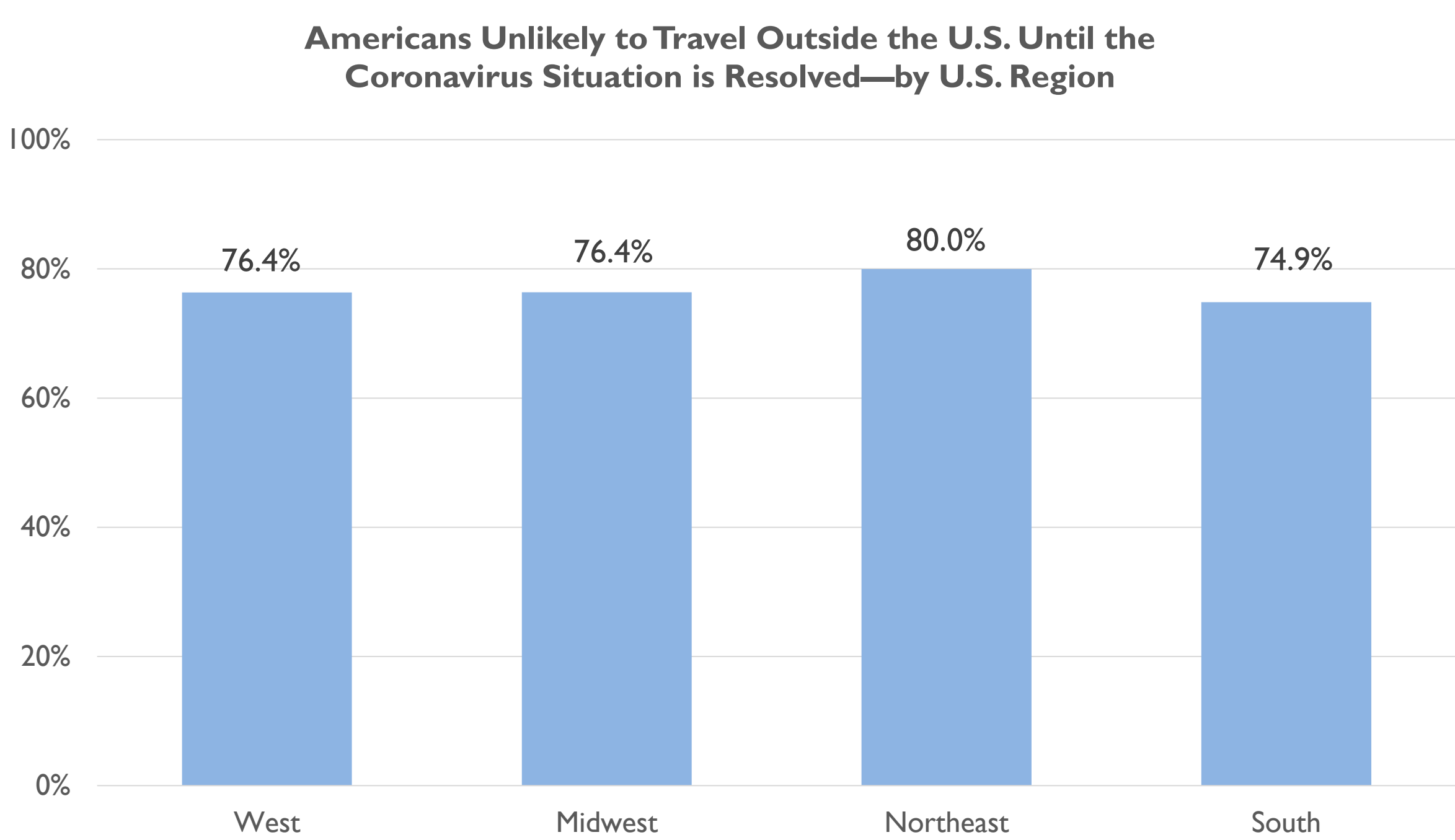
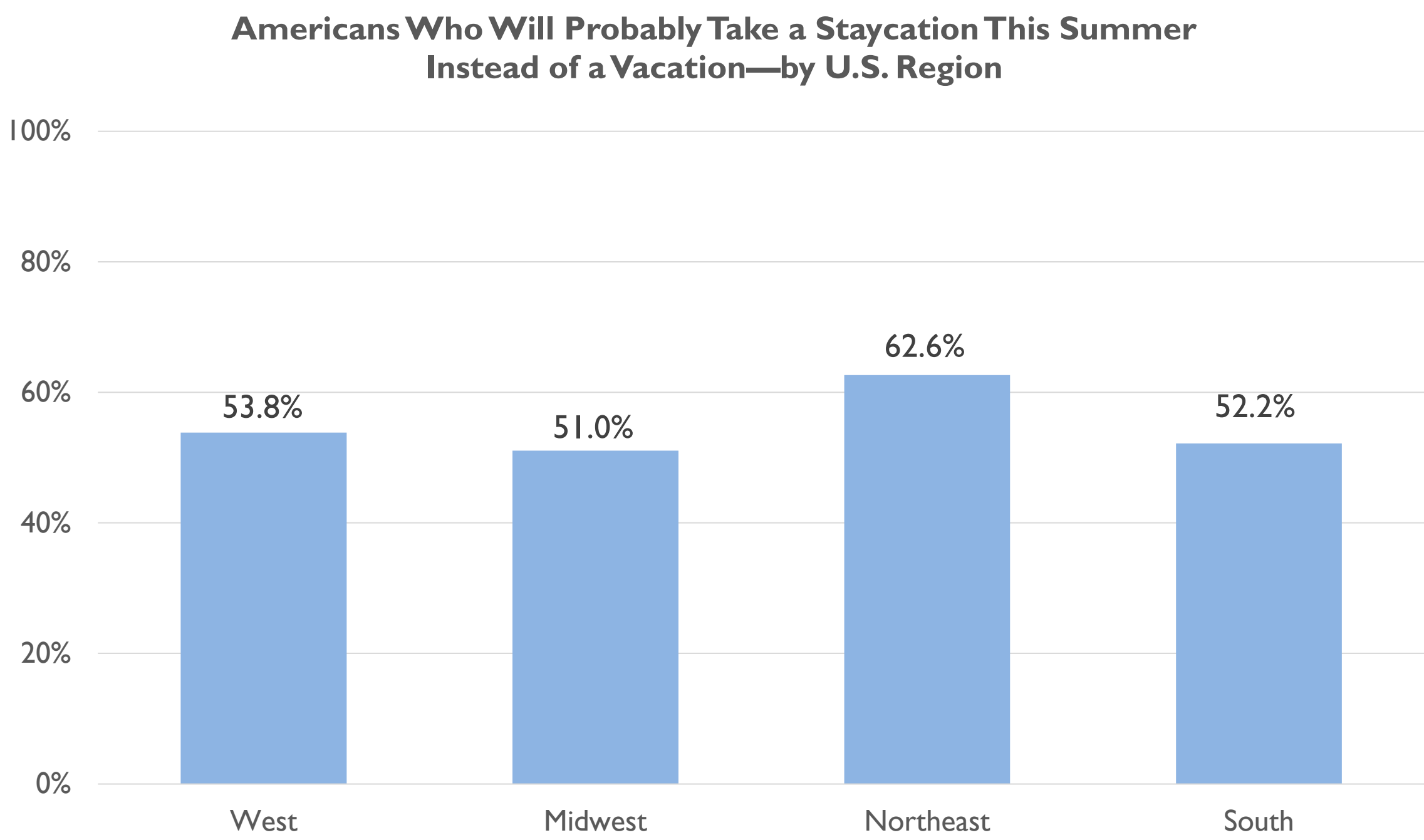
(Base: Wave 10. 1,212 completed surveys. Data collected May 15-17, 2020)

Question: How much do you agree with the following statement?
Statement: I expect that I will be traveling in the Fall of 2020.

(Base: Wave 10. 1,212 completed surveys. Data collected May 15-17, 2020)

Staycations and Avoiding International Travel

In contrast, travelers in the Northeast are more likely to say they are going to take a staycation this summer and avoid international travel in response to COVID-19.



Question: 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: Wave 10. 1,212 completed surveys. Data collected May 15-17, 2020)

Question: 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.

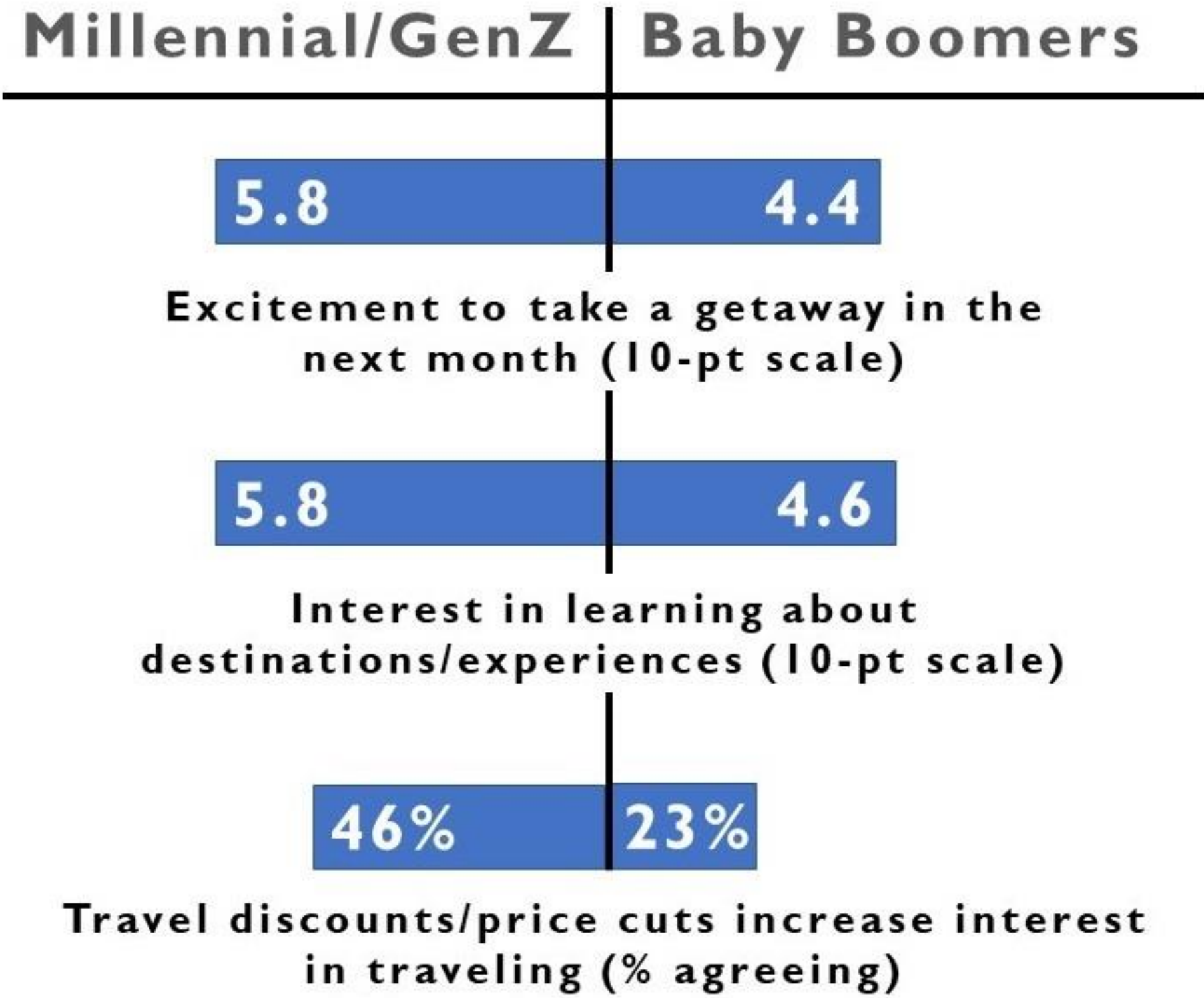
(Base: Wave 10. 1,212 completed surveys. Data collected May 15-17, 2020)

Excitement About Taking a Getaway, Interest in Learning About New Travel Experiences and Interest in Traveling due to Discounts

Millennial and GenZ travelers express a greater sense of safety. Their levels of excitement to travel within the next month and interest in learning about travel destinations are notably higher than Baby Boomers. Millennials and GenZ travelers can be particularly motivated to travel by price-cuts and discounts (45.6%).

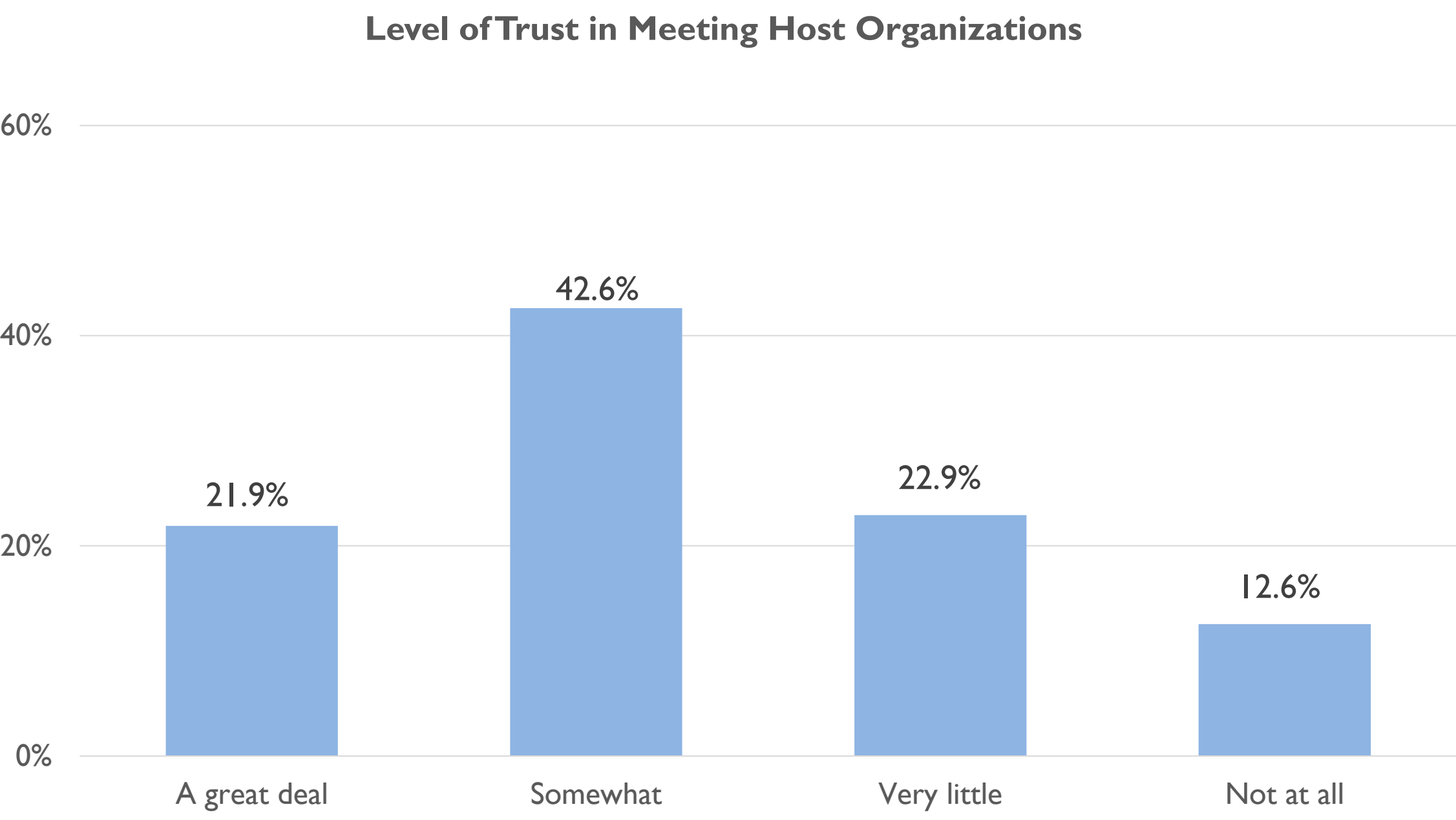
- Question:** Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)
- Question:** At this moment, how interested are you in learning about new, exciting travel experiences or destinations to visit?
- Question:** 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: Wave 10. 1,212 completed surveys. Data collected May 15-17, 2020)

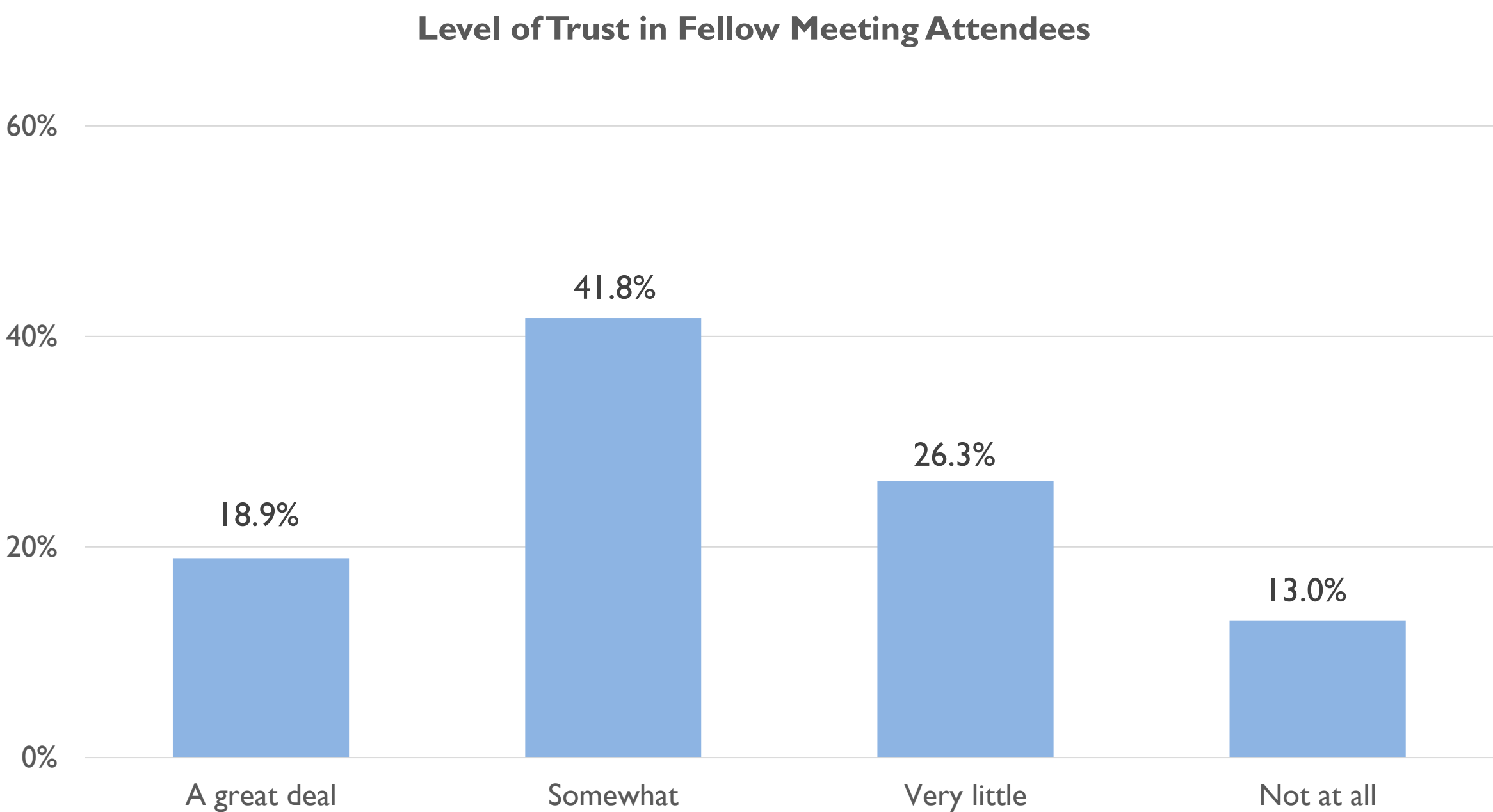


Trust in Meeting Host Organizations and Trust in Meeting Attendees

American travelers are opening back up to attending conferences and conventions. While the perceived safety of conferences and conventions remains depressed, it has improved since the lows recorded in the first half of April. The percent of conference/convention travelers saying they are avoiding these events until the coronavirus situation is resolved is at a 9-week low (67.5%). Right now, 64.5% of conference/convention travelers trust the hosting organizations to look out for their health, while 60.7% say they trust their fellow attendees will conduct themselves appropriately to protect against the spread of viruses.



Question: In general, how much would you trust the organization hosting the conference or convention to look out for your health?
I would trust the hosting organization _____.



Question: Suppose you were to attend a conference or convention sometime in the next year. In general, how much would you trust your fellow attendees to conduct themselves appropriately, doing what they can to protect other attendees from exposure to the COVID-19 virus? I trust my fellow attendees _____.

(Base: Wave 10 convention/conference travelers. 368 completed surveys. Data collected May 15-17, 2020)

(Base: Wave 10 convention/conference travelers. 368 completed surveys. Data collected May 15-17, 2020)

Preparations Completed for Next Leisure Trip

Americans are starting to plan travel. Of the 64.1% of American travelers who have one or more trips at least tentatively planned this year, seven-in-ten have taken some action towards their very next trip, including researching things to see and do (23.3%) and making hotel/lodging reservations (22.4%).

Question: Have you already done any of the following in preparation for your NEXT LEISURE TRIP?

(Base: Wave 10 respondents who have plans to travel this year. 772 completed surveys. Data collected May 15-17, 2020)

Preparations Already Completed for Next Leisure Trip

(% of travelers selecting any of the following)



Talked to friends/relatives about trip (31.7%)



Researched things to see and do on trip (23.3%)



Booked hotel, motel or inn (22.4%)



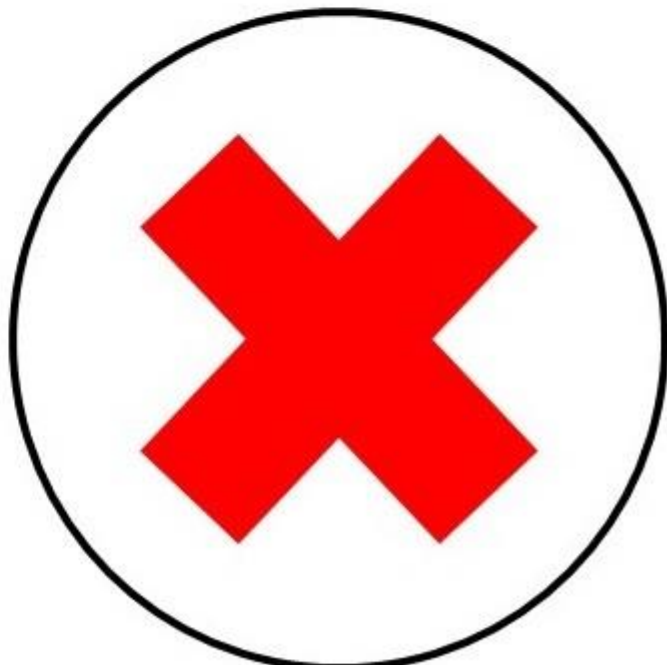
Bought plane tickets (17.9%)



Booked passage of a cruise liner (9.7%)



Purchased train tickets (5.6%)



None of these (29.6%)

Americans Who Will Take a Vacation/Weekend Getaway for their Next Trip

Over half of American travelers who have one or more trips at least tentatively planned this year describe their next trip as a vacation or weekend getaway (54.4%).

27.7% say their next trip will be for the explicit purpose of visiting friends and relatives and 13.4% will travel to attend a festival, sports or other event. Of those who will take a vacation or getaway, over half are still not fully decided on where they will go and could be potentially influenced through marketing. Beaches, parks and other natural environments appear particularly attractive to this group right now.

(Base: Wave 10 respondents who plan to take a vacation or weekend getaway for their next trip this year. 430 completed surveys. Data collected May 15-17, 2020)

Americans Who Will Take a Vacation/Weekend Getaway for their Next Trip



Preparations Completed for Next Leisure Trip

No matter that type of trip, three-quarters of Americans who plan to travel this year will research how the destination they visit and its businesses are managing the coronavirus situation—demonstrating the need for destination-level information on safety. A majority of these travelers plan to carry hand sanitizer, follow social distancing guidelines, avoid crowds, and wear a face mask on their trips.

Question: Which of the following will you be likely to do on your NEXT LEISURE TRIP? (Select all that apply)

(Base: Wave 10 respondents who have plans to travel this year. 772 completed surveys. Data collected May 15-17, 2020)

Which of These Will You Be Likely to Do on Your Next Trip?

(% of travelers selecting any of the following)



Carry hand sanitizer
(65.5%)



Follow social distancing
guidelines (64.4%)



Avoid crowds
(58.5%)



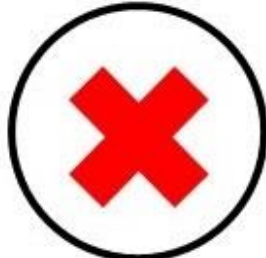
Wear a face mask
(57.3%)



Only eat restaurant
take-out (28.3%)



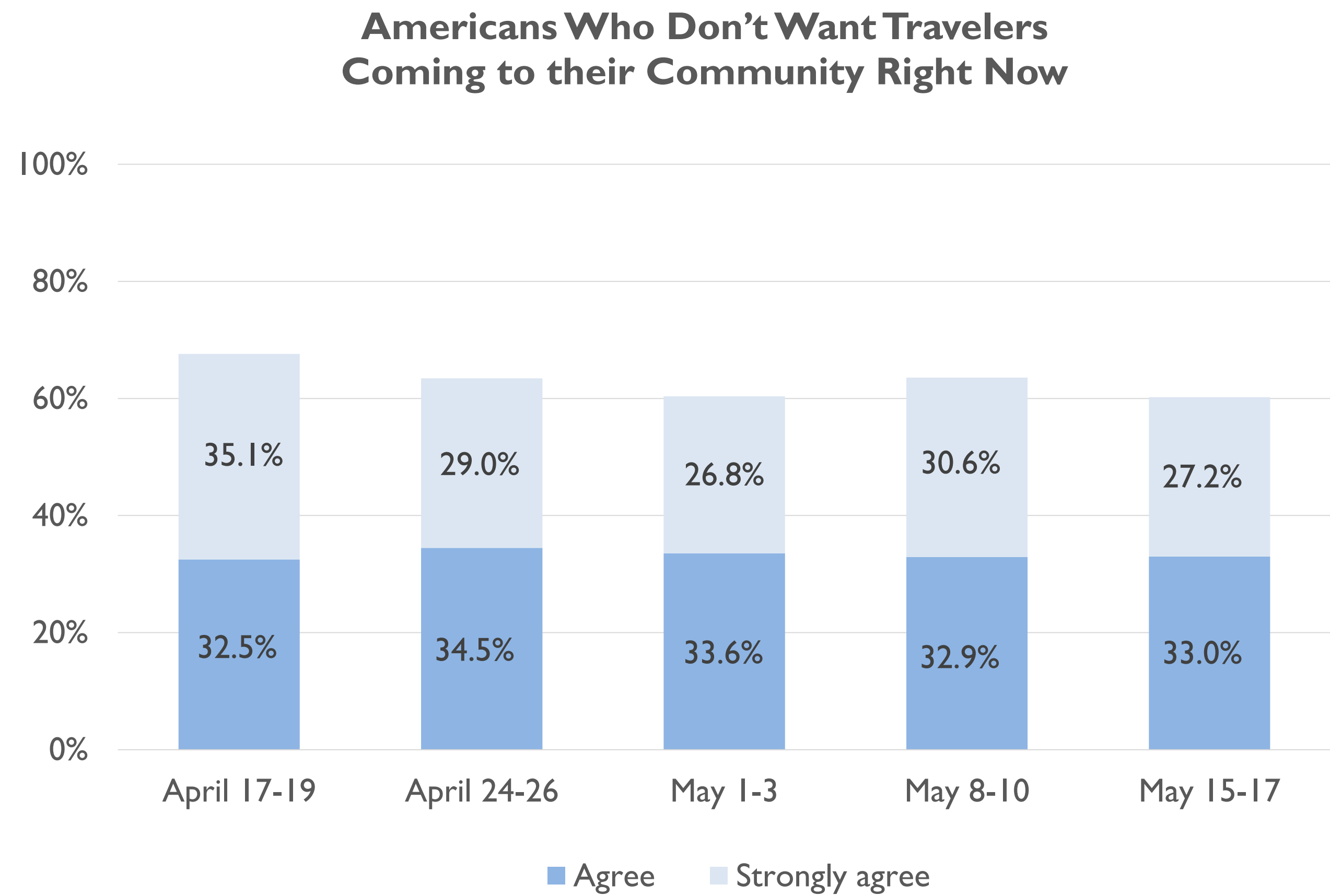
Wear gloves
(22.8%)



None of these
(5.7%)

Travelers in Community

When it comes to visitors in their own communities, the percent of American travelers who say they don't want them remains high (60.2%), but is at a 4-week low. Rural residents are the least comfortable with tourists presently (66.3%), followed by urban (64.0%) and suburban (56.9%) residents. With travelers showing a desire for the type of tourism assets most commonly associated with a rural experience, some tensions may arise.



Question: How much do you agree with the following statement?
Statement: I do not want travelers coming to visit my community right now.

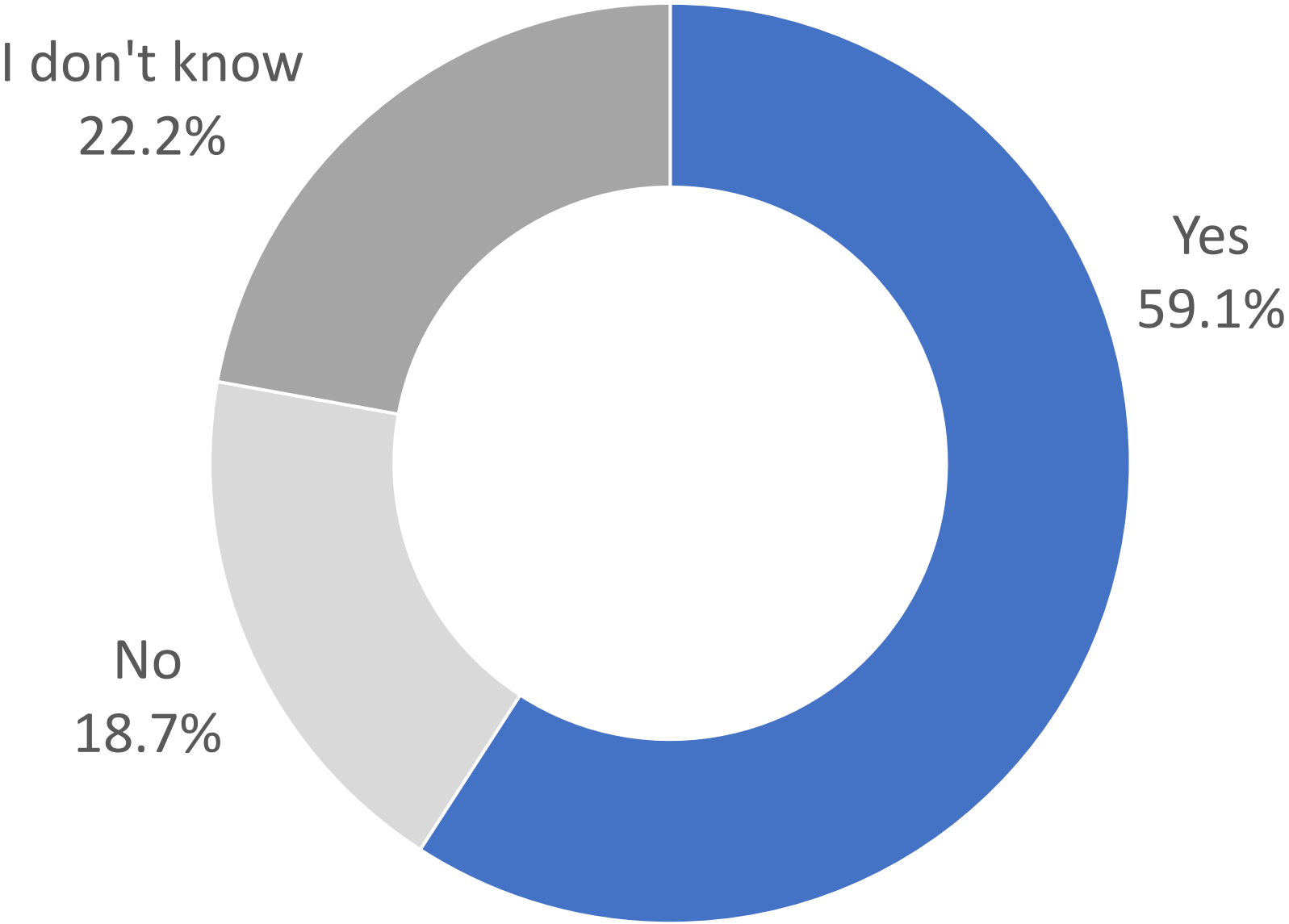
(Base: Waves 6-10. All respondents, 1,238, 1,208, 1,204, 1,200 and 1,212 completed surveys. Data collected April 17-19, 24-26, May 1-3, 8-10 and 15-17, 2020)

Family Travel After Sheltering-in-Place

Nevertheless, travel is still recognized for its positive emotional benefits. For those American travelers currently under shelter-in-place orders, 59.1% feel that traveling together when the Coronavirus situation is over would be good for their family.

Question: Do you feel that traveling together when the Coronavirus situation is over would be good for your family?

*(Base: All respondents living under shelter-in-place restrictions, 1,005 completed surveys.
Data collected May 15-17, 2020)*





Coronavirus Travel Sentiment Index

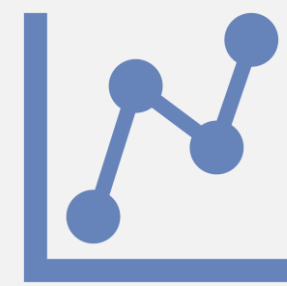
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 18th

What is a Predictive Index?



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



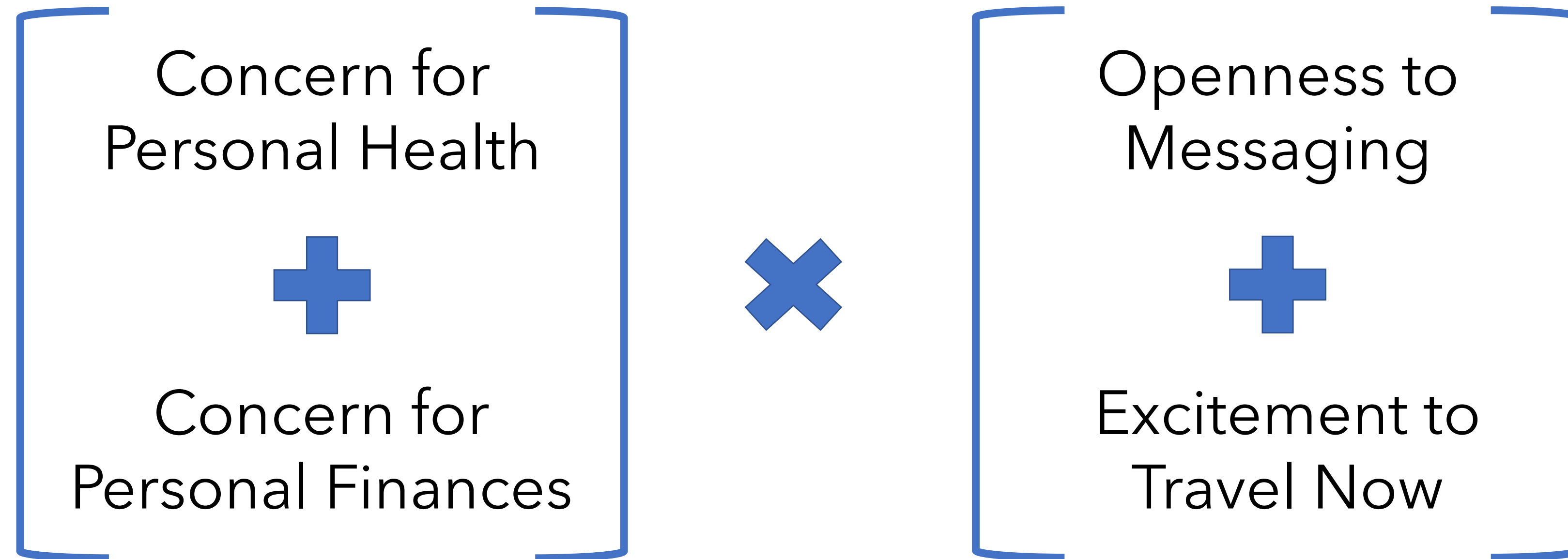
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

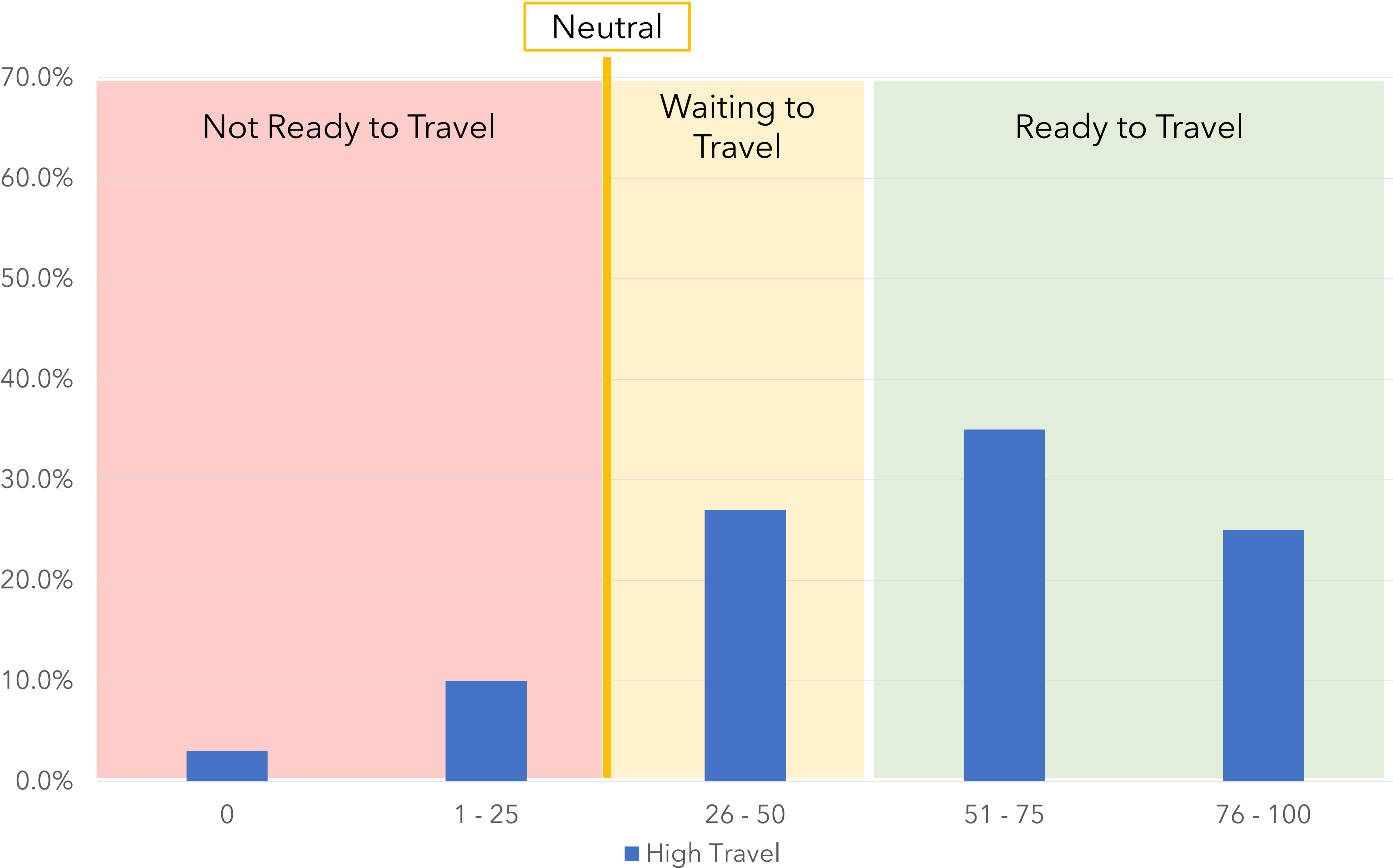
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

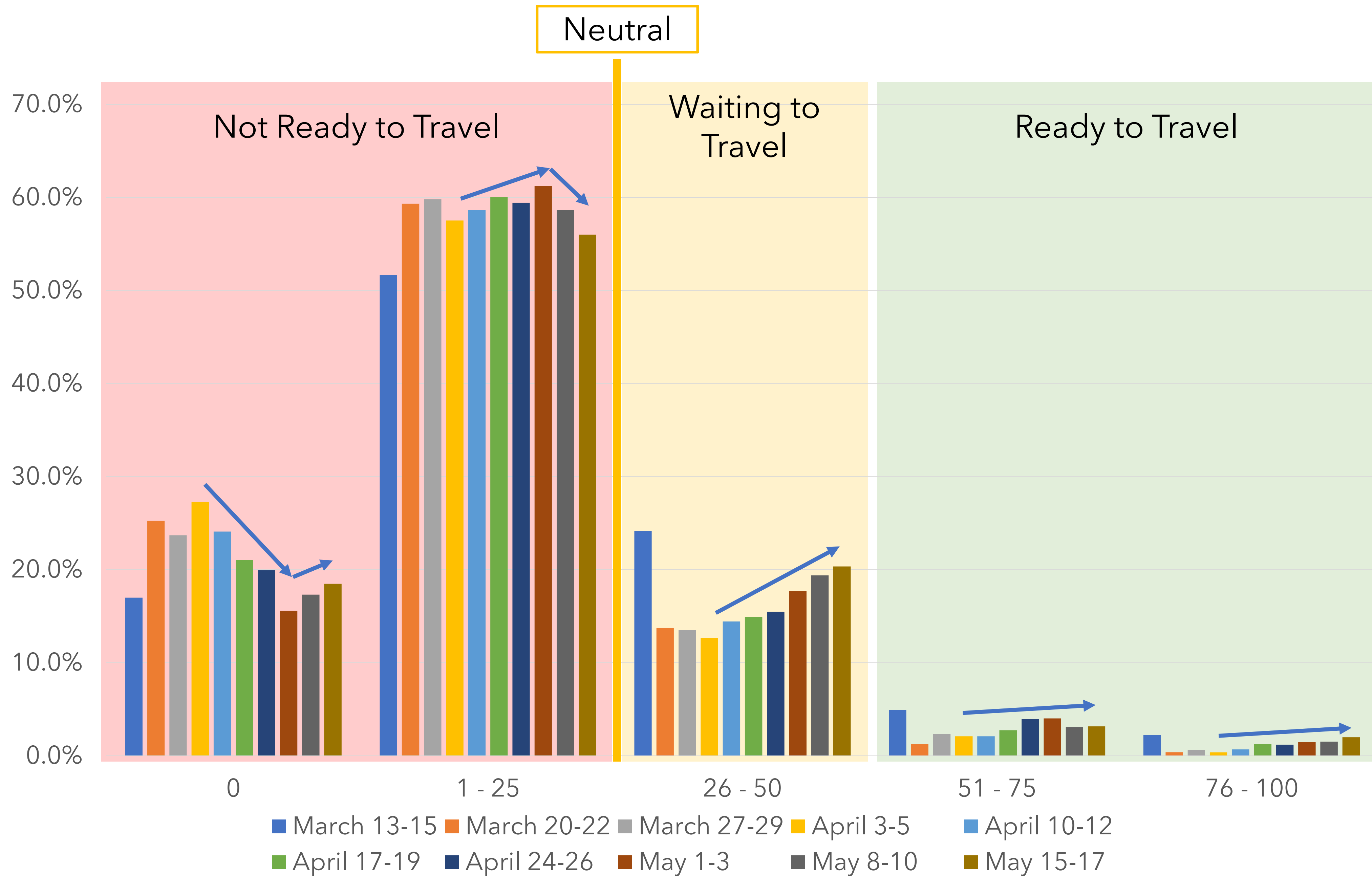


*Normalized to a 100pt scale

Healthy Travel Outlook



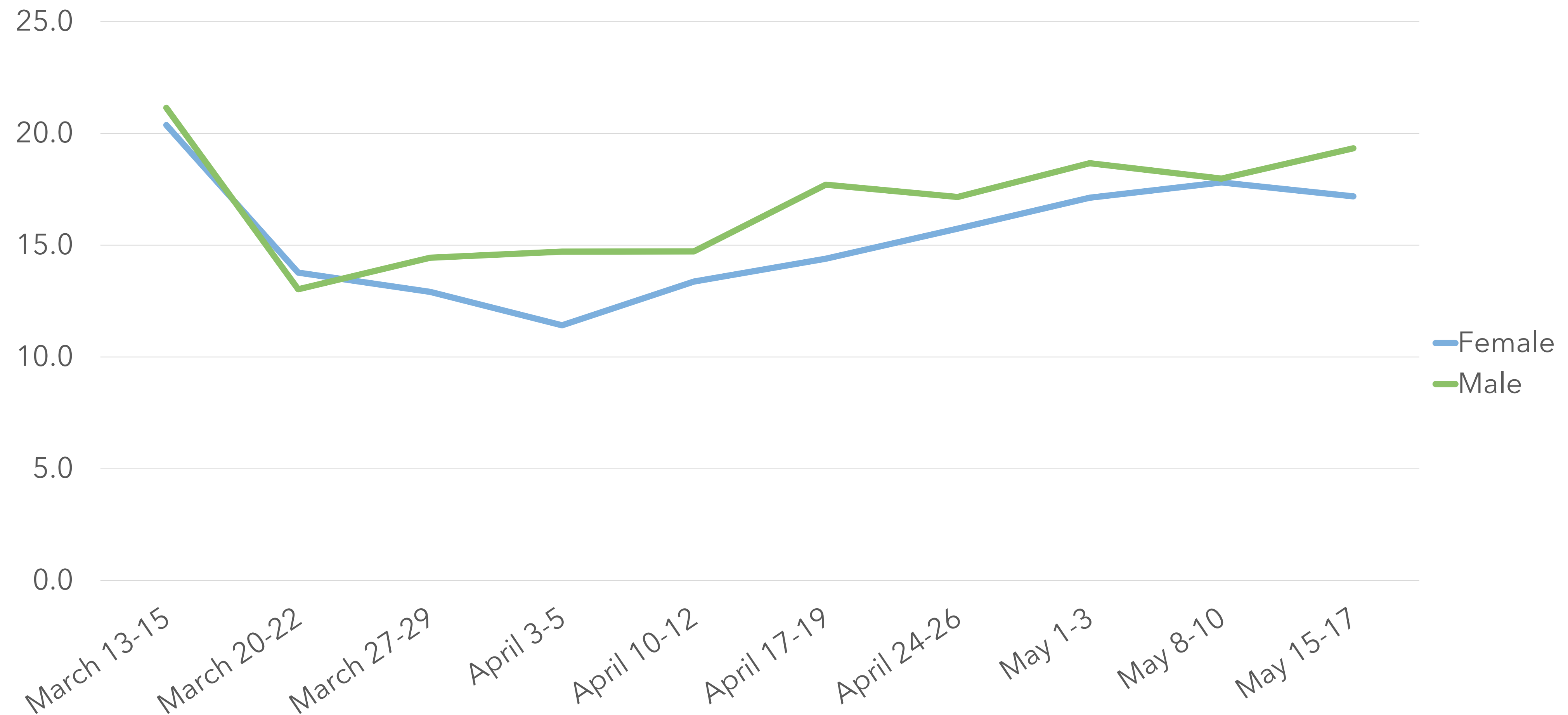
Travel Outlook: Week of May 18th



Gender

Points of Interest:

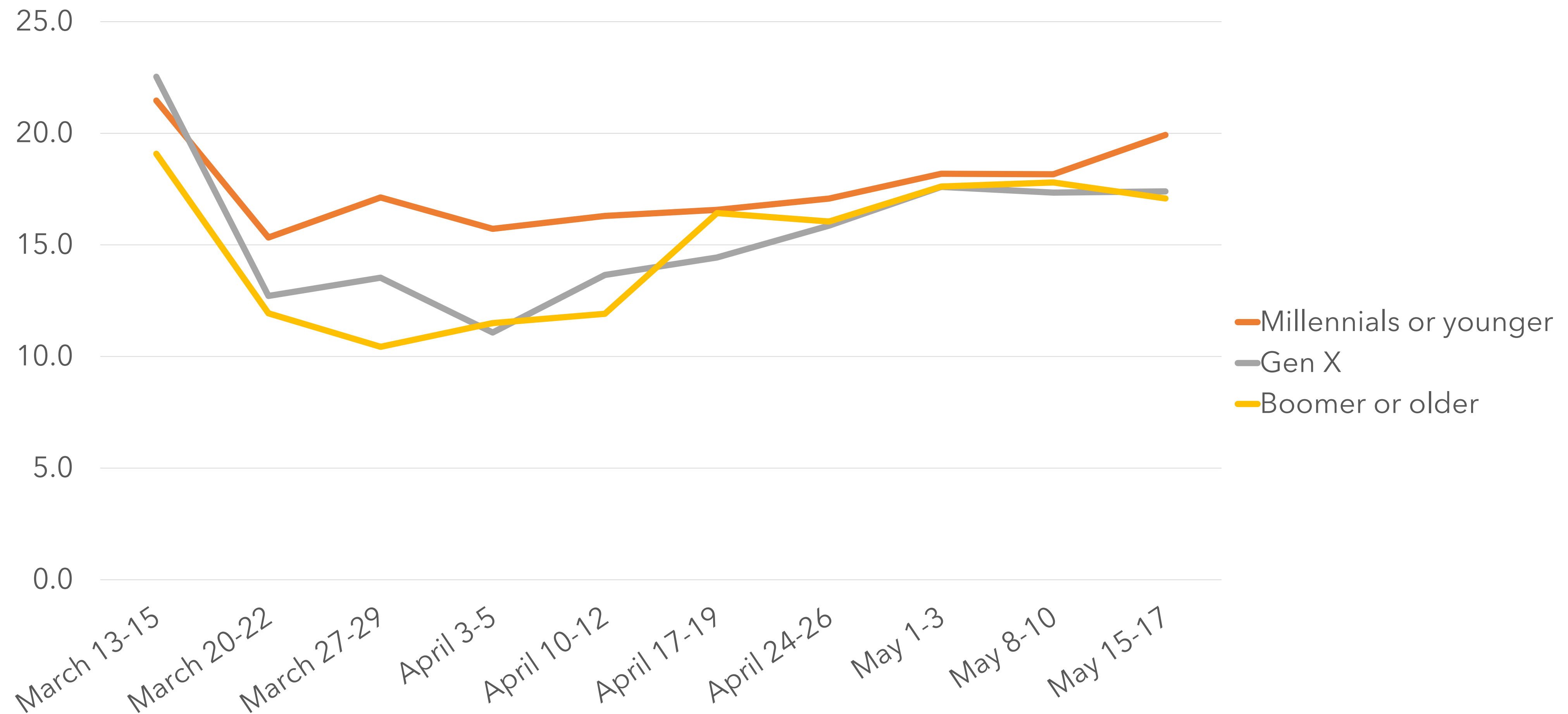
- Financial concerns for men dropped slightly this week while safety concerns for both men and women remained consistent with previous waves.
- A third of women this week said they have no plans to travel in 2020 (33.2%) while only a quarter of men (26.0%) said the same.



Generation

Points of Interest:

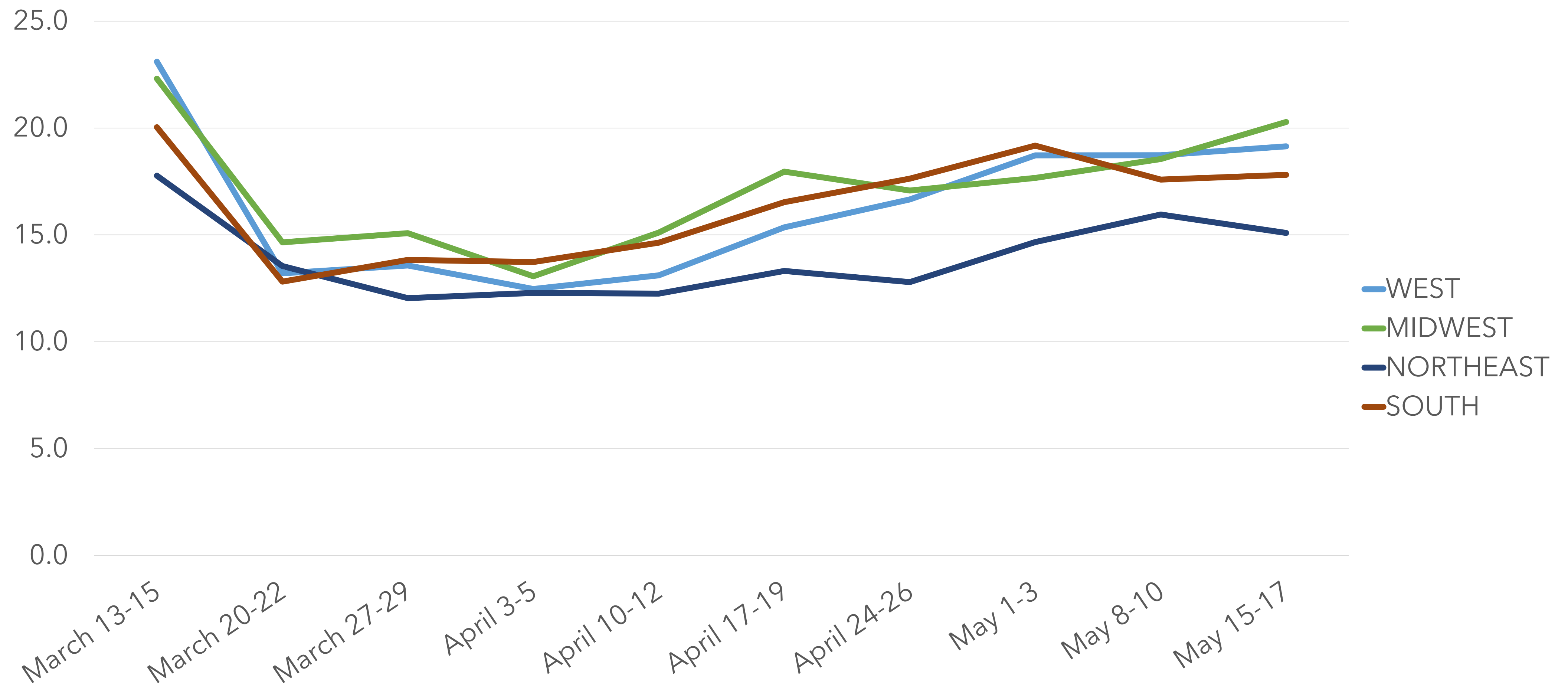
- Millennials reported a slight drop in safety concerns this week while safety concerns for Gen X and Boomers slightly grew.
- Millennials this week show optimism for the severity of the coronavirus situation; 34.5% (down from 45.5% last week) said they expect the situation to get worse or much worse. Comparatively both Gen X and Boomers showed little change in this expectation week over week.



US Region

Points of Interest:

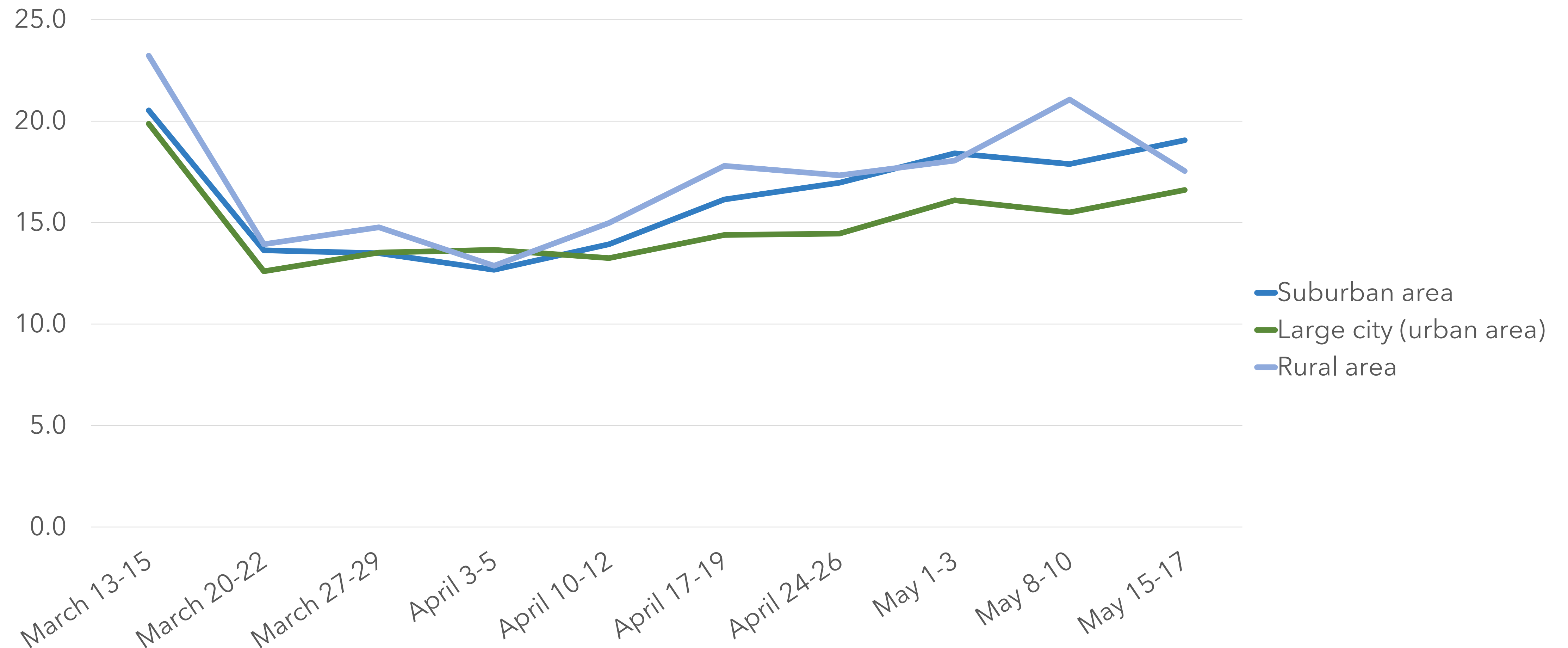
- Safety concerns in the West grew this week while similar concerns dropped in the Midwest and remained consistent in the Northeast and South.
- Financial concerns also dropped in the Midwest but grew in the Northeast.
- Both excitement to travel and openness to messaging grew overall this week.
- Excitement grew most notably in the West and Northeast while openness grew most significantly in the South.



Type Of Residence

Points of Interest Impacting Index Scores:

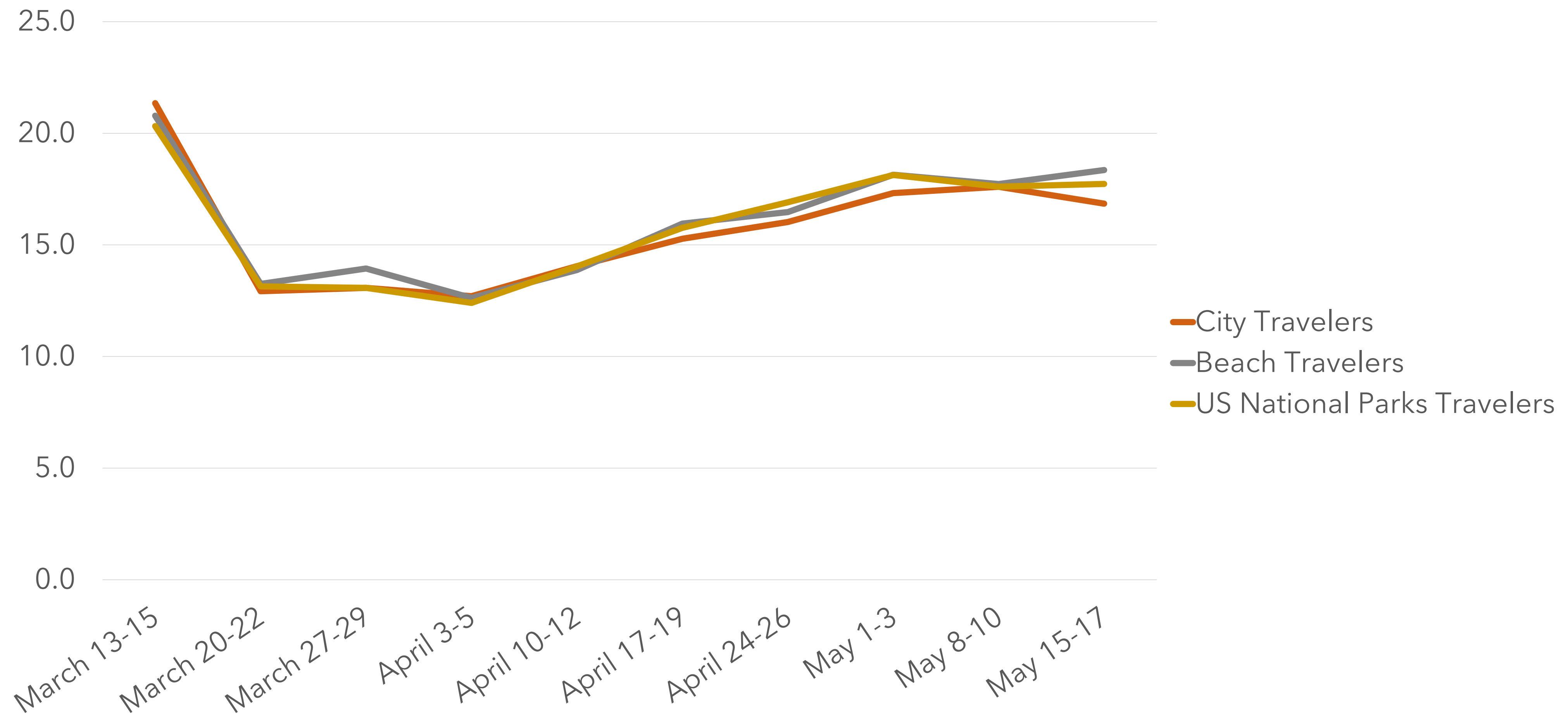
- Showing a dramatic shift from last week, Rural respondents showed the highest levels of both personal and financial concerns this week compared to their Urban and Suburban counterparts.
- Excitement to travel also dipped this week for Rural respondents.



Favorite Destination Types

Points of Interest:

- Travelers who love beach destinations report the highest relative excitement for travel this week.
- Travelers who love cities report higher levels of safety concerns than beach and National Park travelers.
- However, city travelers report wanting to travel the farthest distance from home on their next leisure trip.





Questions?
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Information?

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

15-minute presentations for your board and stakeholders

info@destinationanalysts.com

