

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF MAY 25TH, 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

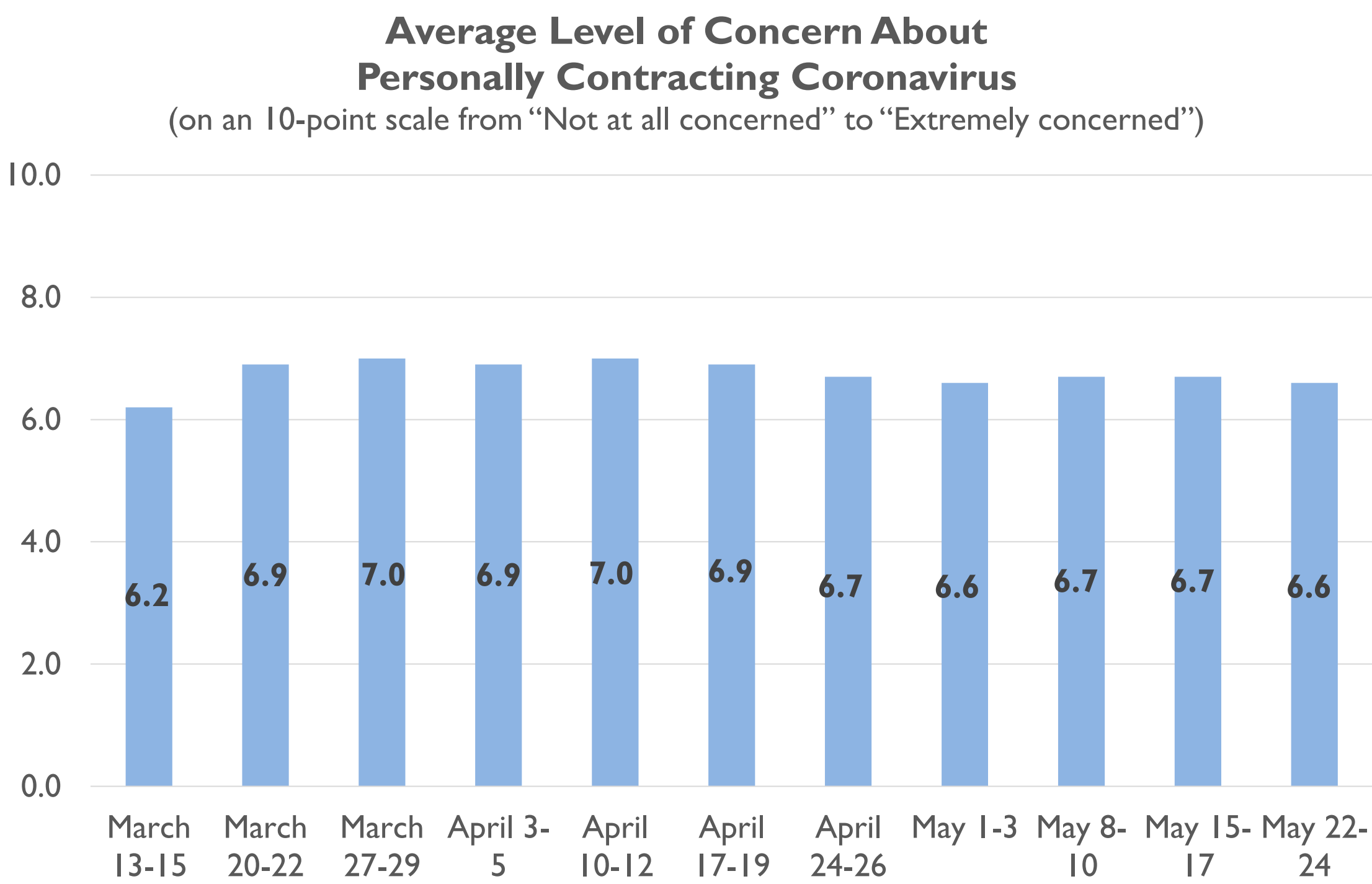
A hand is reaching out from the left side of the frame, palm facing forward, against a background of a sunset over the ocean. The sky is a deep blue, and the water is dark with white foam from the waves. The hand is positioned as if it's about to touch something or is gesturing towards the text.

Key Findings for the Week of May 25th

Please cite Destination Analysts when using or distributing this data

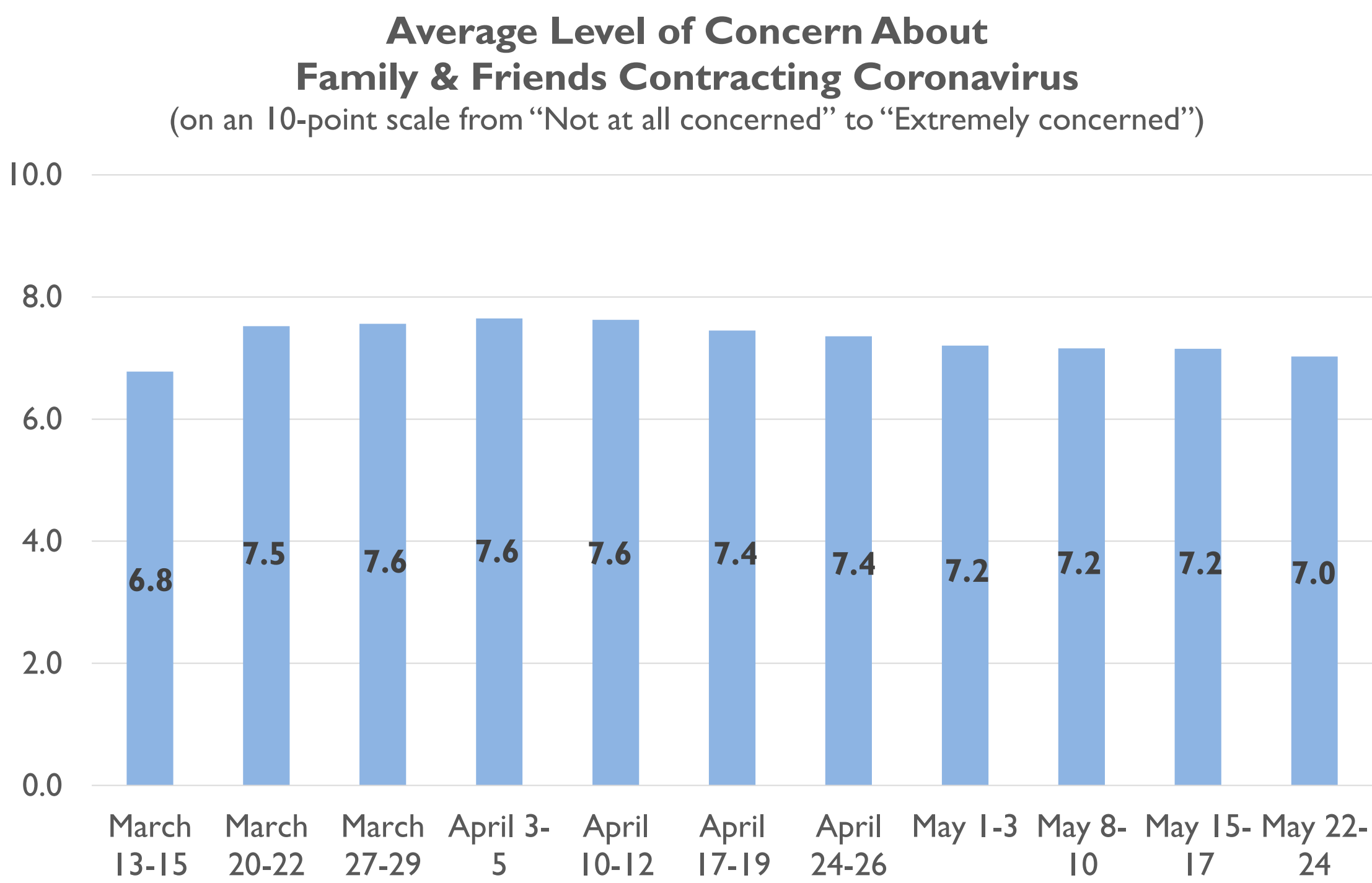
Personal Health Concerns & Concerns About Family & Friends

American travelers continue their slow march towards feeling safer. This week brought another improvement in their concerns about personally contracting the virus (6.6/10) and their friends or family contracting it (7.0/10, an 11-week low).



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, 1,212 and 1,223 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 and 22-24, 2020)

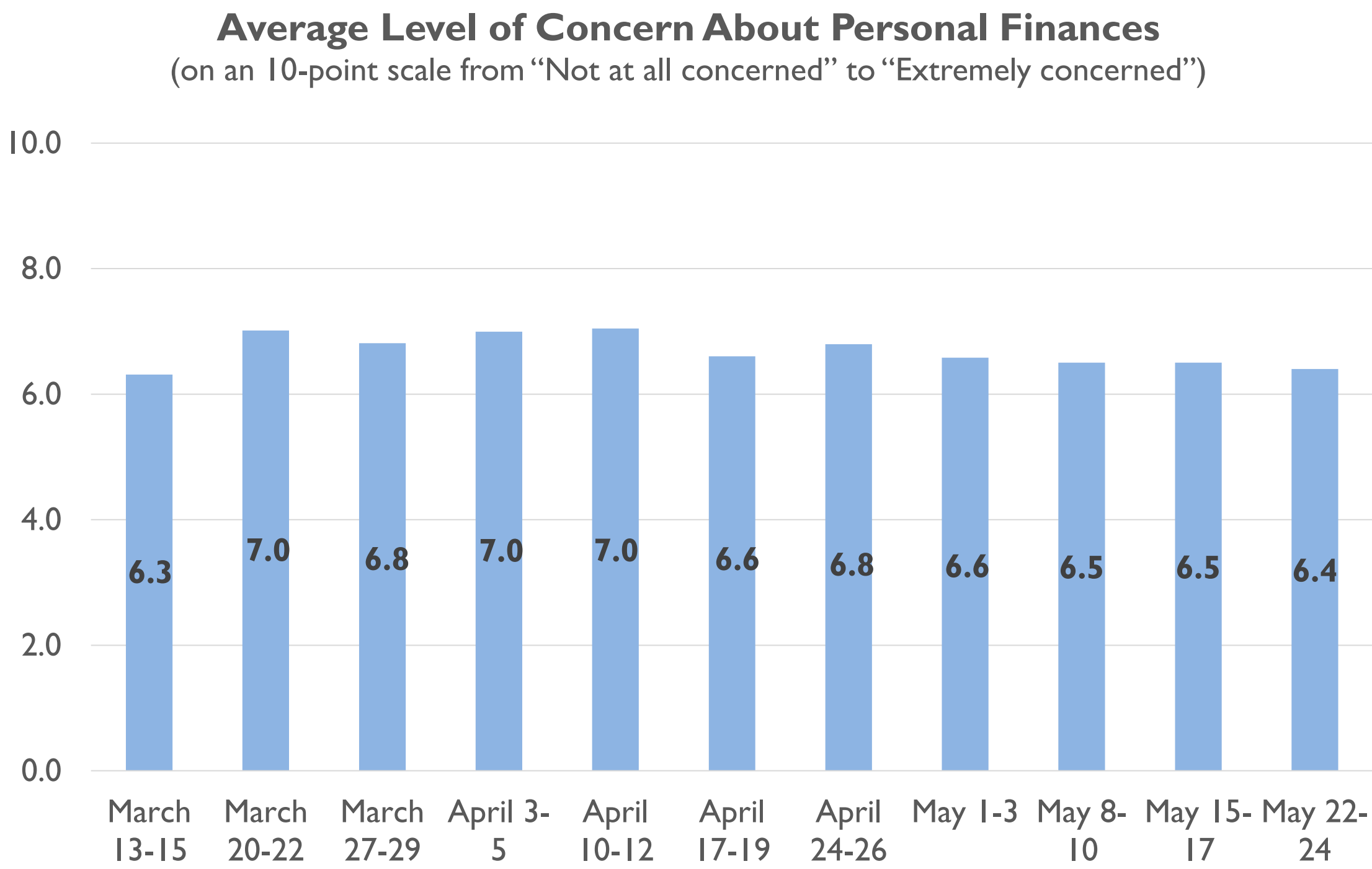


Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

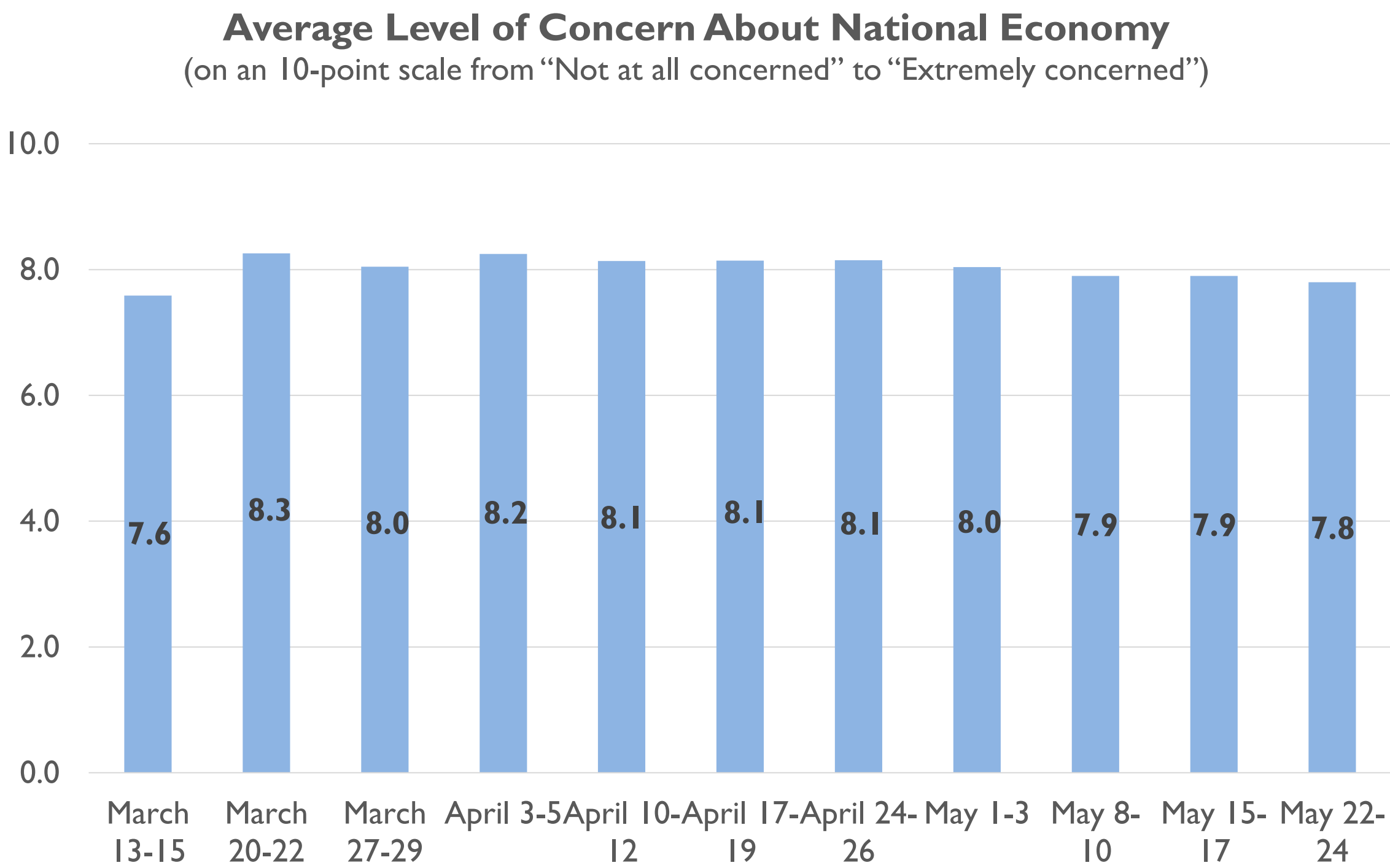
Concerns About Personal Finances & National Economy

There are also improvements in concerns the impact the virus has on personal finances (6.4/10—near the level it was the week of March 15) and its impact on the national economy (7.8/10, the lowest its been since March 15).



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, 1,212 and 1,223 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 and 22-24, 2020)

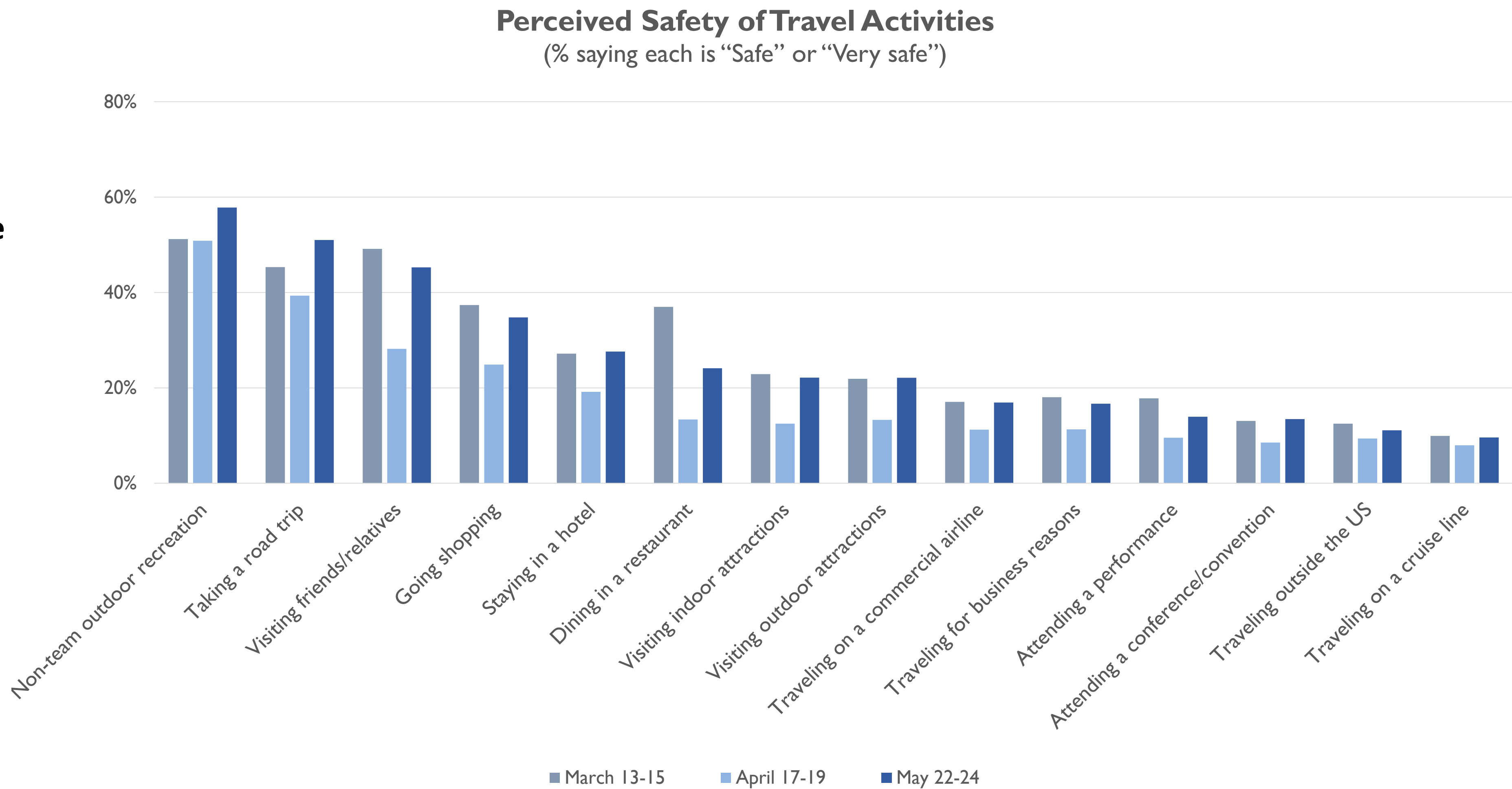


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the **NATIONAL ECONOMY**? (Please answer using the scale below)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

Perceived Safety of Travel Activities

Perceptions of the safety of various travel activities are nearing what was recorded the week of March 15th when we began this measurement (and before the most dramatic drop in safety perceptions, which occurred between March 15 and 22nd).

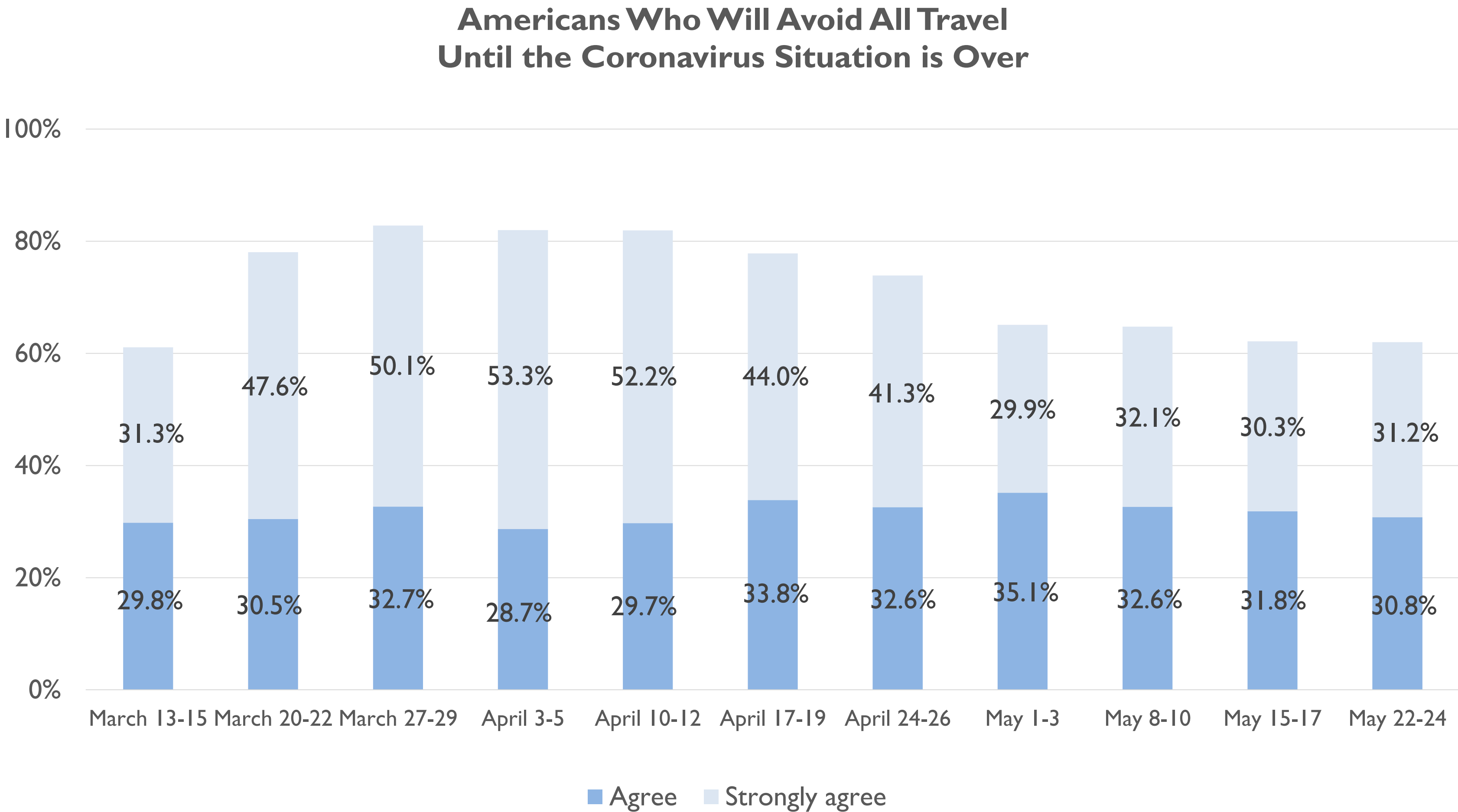


Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 1, 6 and 11. 1,201, 1,238 and 1,223 completed surveys. Data collected March 13-15, April 17-19 and May 22-24, 2020)

Avoiding Travel Until the Crisis Blows Over

The proportion agreeing they are going to avoid all travel until the coronavirus situation is blown over in their mind is also near the level it was March 15th (61.1%).



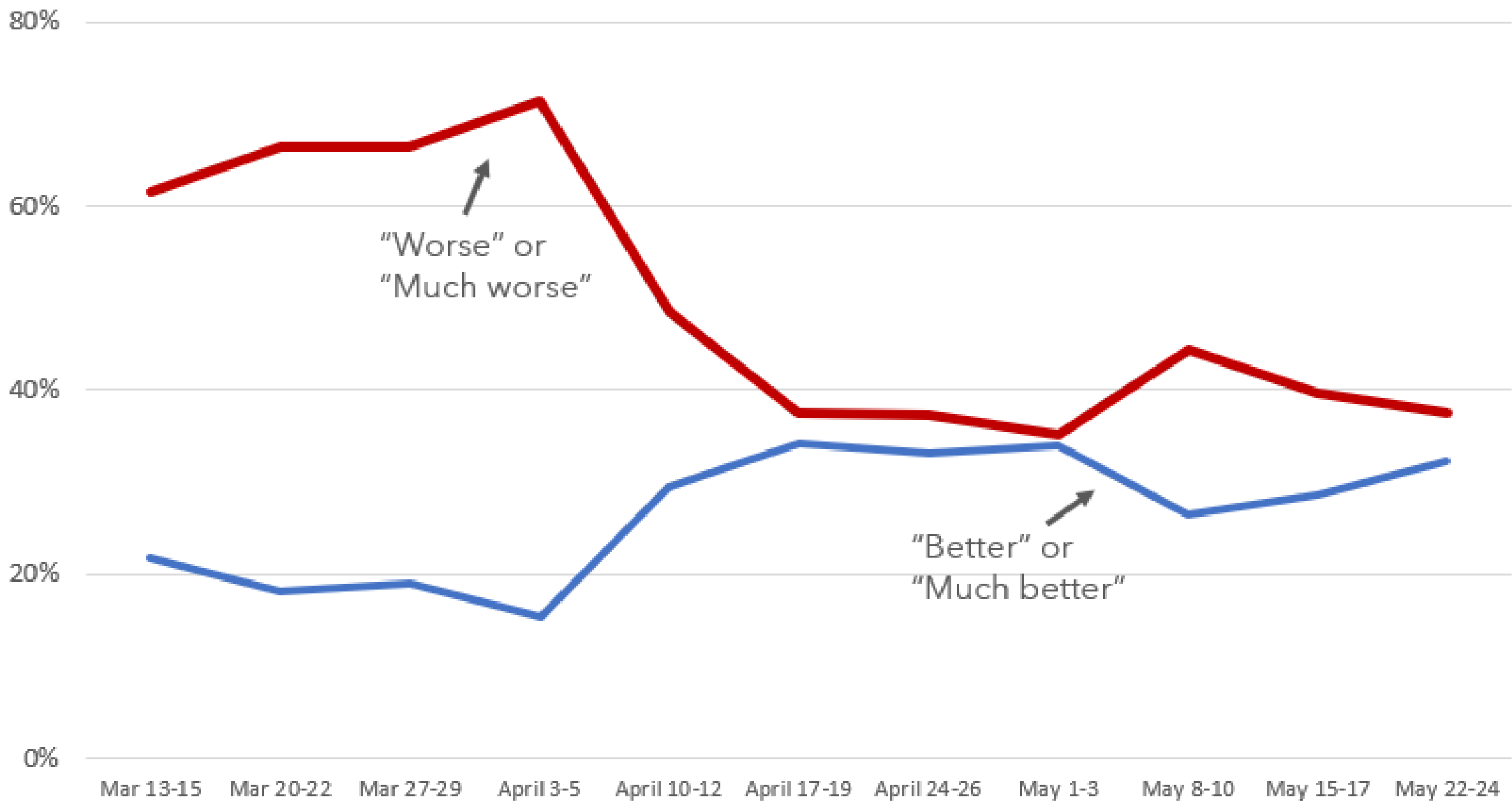
Question: How much do you agree with the following statement?
Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

Expectations for the Coronavirus Situation

Opinion that the coronavirus situation will get better in the U.S. in the next month again increased from the dip seen the week of May 8th (32.3%).

Expectations for the Coronavirus Situation in the U.S. (Over the Next Month)

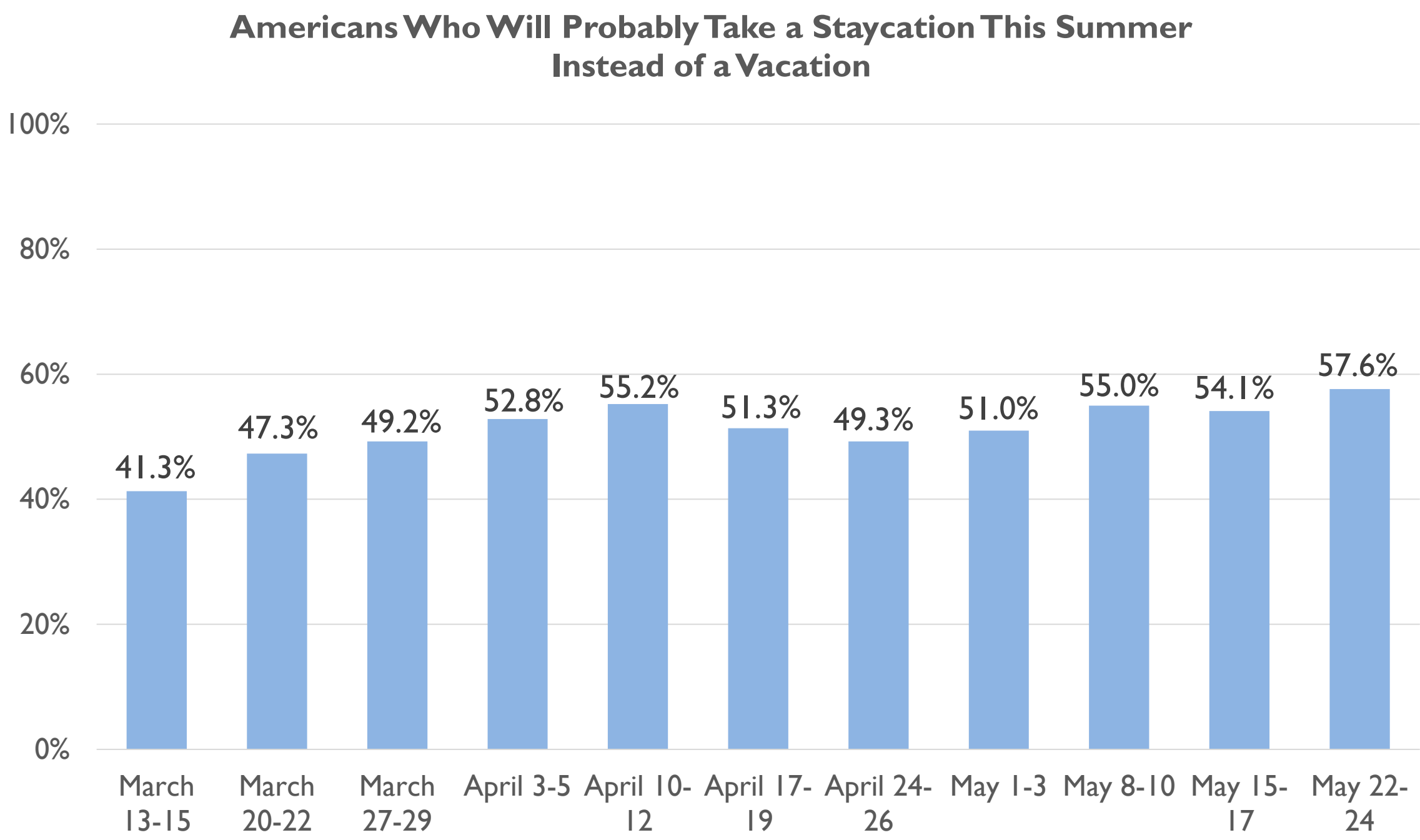


Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?
(Select one) In the next month the coronavirus situation will _____

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1223 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, and May 22-24, 2020)

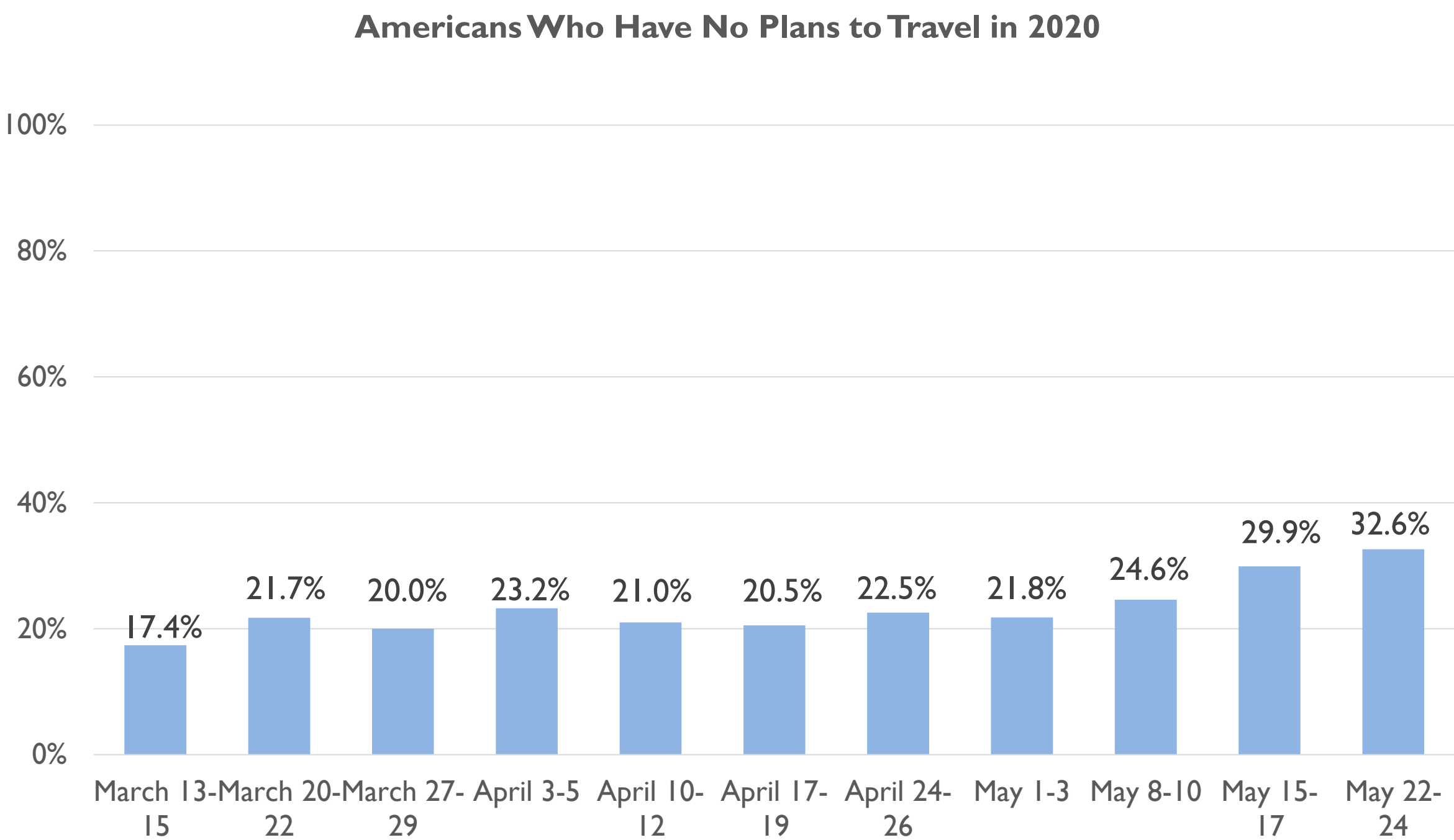
Staycations and Avoiding International Travel

In addition to the significant drops in expected trip volume and spending on travel, this week the percent saying they will take a staycation rather than a vacation this summer (57.6%) and the percent saying they are going to wait until 2021 to travel again (32.6%) both reached a high.



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: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

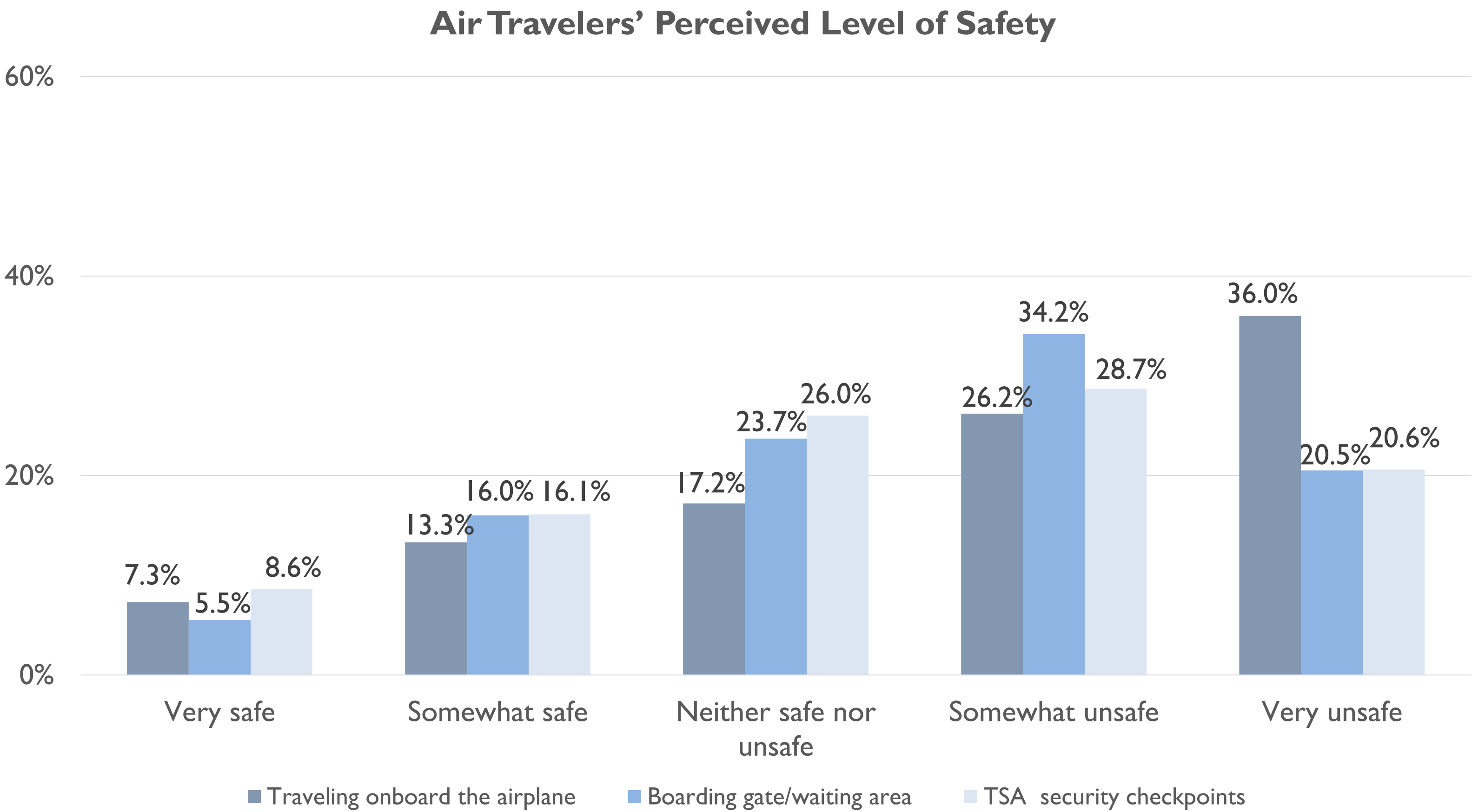


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips? (Select all that apply)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

Safety Traveling By Commercial Airline

Health and safety remain central to this measured outlook and behaviors toward travel, and this is profoundly seen in current perceptions of air travel. Over one-third of airline travelers still characterize traveling onboard an airplane as “very unsafe” (and another quarter say it is “somewhat unsafe”).

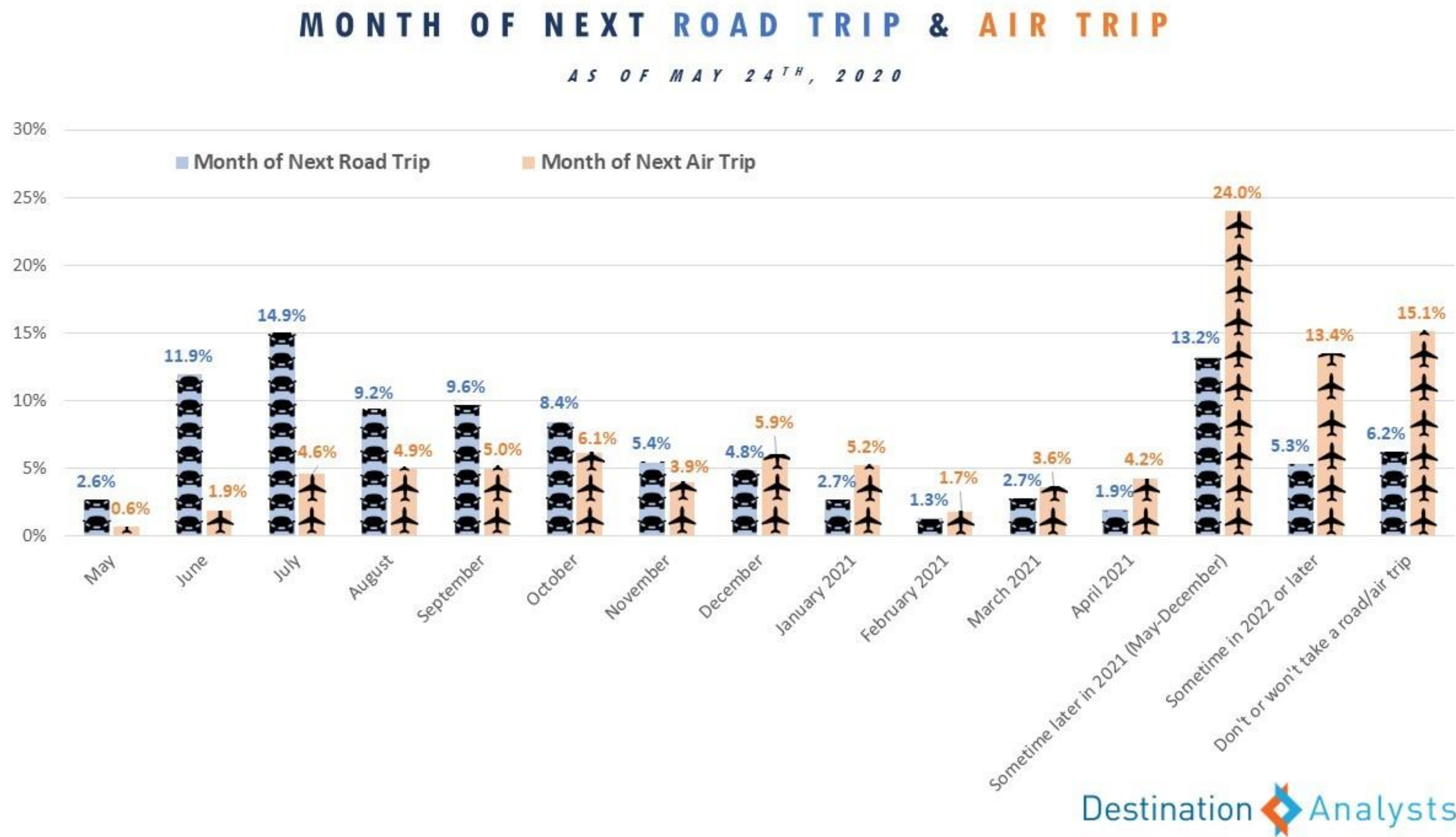


Question: Imagine you are taking a trip in the United States, and you will travel by commercial airline. Using the scale below, please tell us how safe you would generally consider each of the following right now.

(Base: Wave 11 air travelers. 758 completed surveys. Data collected May 22-24, 2020)

Air and Road Trip Plans

While they show lesser concerns about the boarding gate/waiting areas and TSA security checkpoints, many Americans are looking to put off their next air trip 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)?

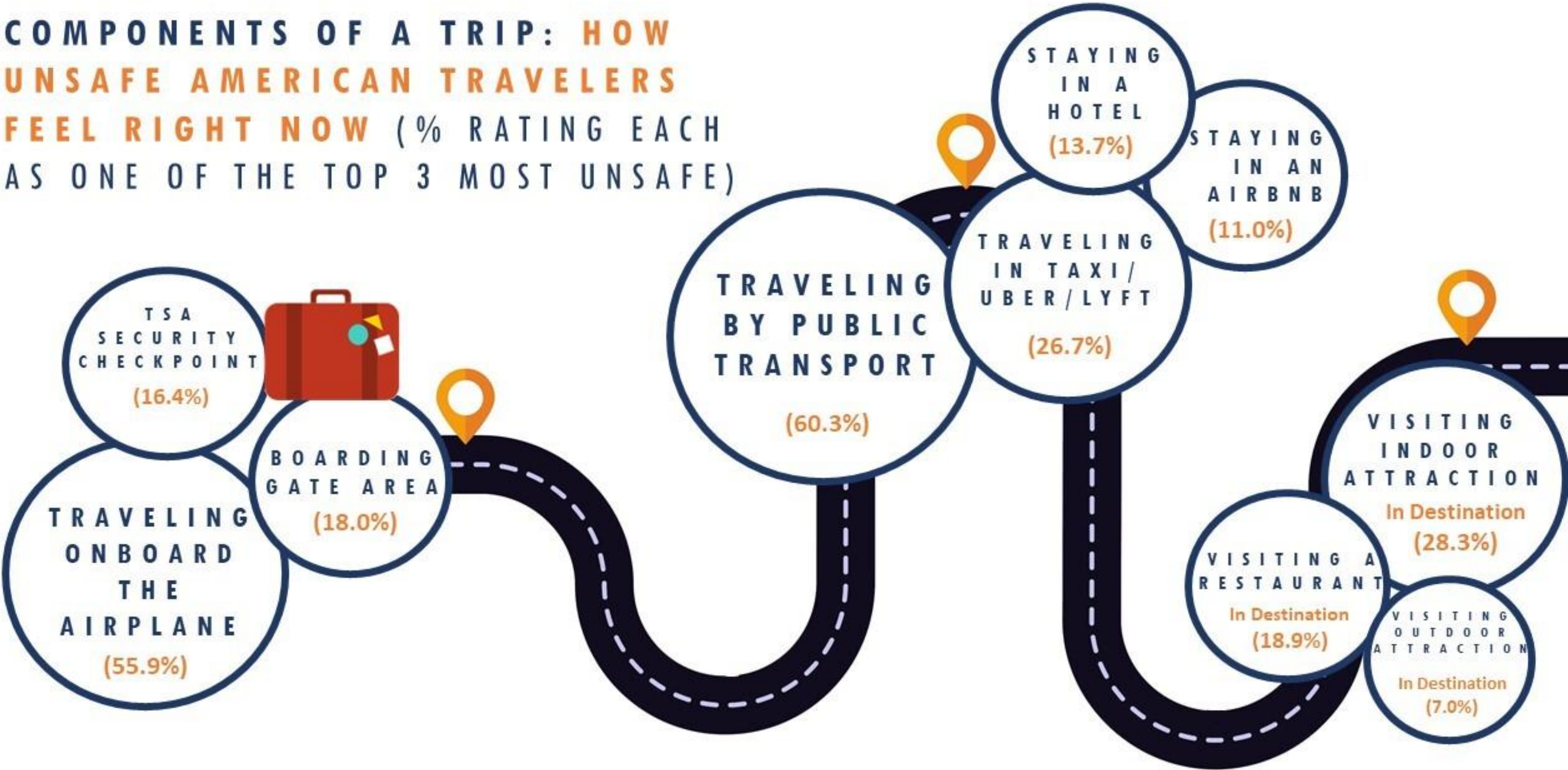
(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)

Travel Activities Considered the Most Unsafe

It's imperative to the industry's recovery that travelers feel they will be safe in every aspect of their journey, and certainly travel industry related businesses are working hard to ensure this is a reality. To examine where the strongest points of resistance may be and/or which experiences may need more safety guidelines communicated, we asked travelers to rate what they feel are the TOP THREE most unsafe components of a common travel experience. Right now, taking public transportation, traveling onboard the airplane, visiting indoor attractions in their trip destination, and traveling in taxis/Ubers/Lyfts are most agreed upon as the least safe aspects of a potential trip.

Question: Thinking about the Coronavirus situation, which of these would you consider to be the most unsafe travel activities? YOU MAY SELECT AS MANY AS THREE (3)

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)



Question: Thinking about the coronavirus situation, which of these would you consider to be the most UNSAFE travel activities? Select up to 3

Perceived Safety of Staying in Lodging

Although lodging was not as commonly chosen as the least safe aspect of a typical trip, it is important to understand the degree to which travelers are feeling they will be safe at Airbnbs/vacation home rentals (often perceived as easier to socially distance but without the formalized levels of housekeeping/sanitation) and hotels (often perceived as being more difficult to avoid other travelers but with the ability to enact strict sanitation protocols). Staying in a hotel is currently perceived as safe by 27.6% of American travelers and staying in an Airbnb/vacation home rental by 21.3%. Note that younger travelers are much more trusting of Airbnb/vacation home rental safety compared to older travelers.



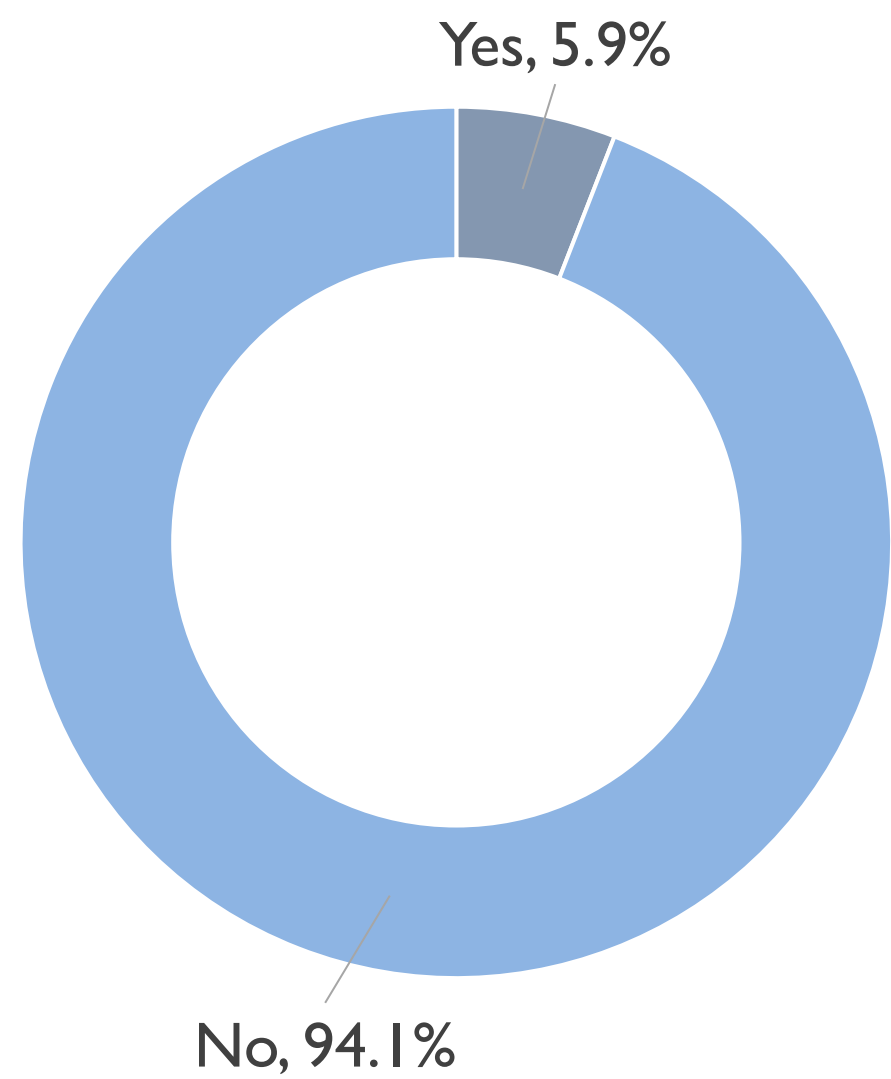
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)

Memorial Day Weekend Trip

With Memorial Day weekend traditionally considered the (un)official start of the summer travel season--and now the first national holiday celebrated during the COVID-19 pandemic, with all 50 states under loosened restrictions, this made for an interesting study. Did Americans, in fact, travel? As of the morning of May 24th—the Sunday of Memorial Day weekend 2020—just 5.9% of American travelers reported they were taking a trip this holiday. Of those that went on a trip, 42.7% made the decision to take it within the last week. Similarly, a recent Harris Poll conducted about Memorial Day travel plans found that 95% of the American population believed it was too soon to travel. In addition, AAA declined to put out its annual Memorial Day travel estimate citing COVID-19’s impact on the accuracy of their data, but expected it to be a record low in their two decades of this forecast.

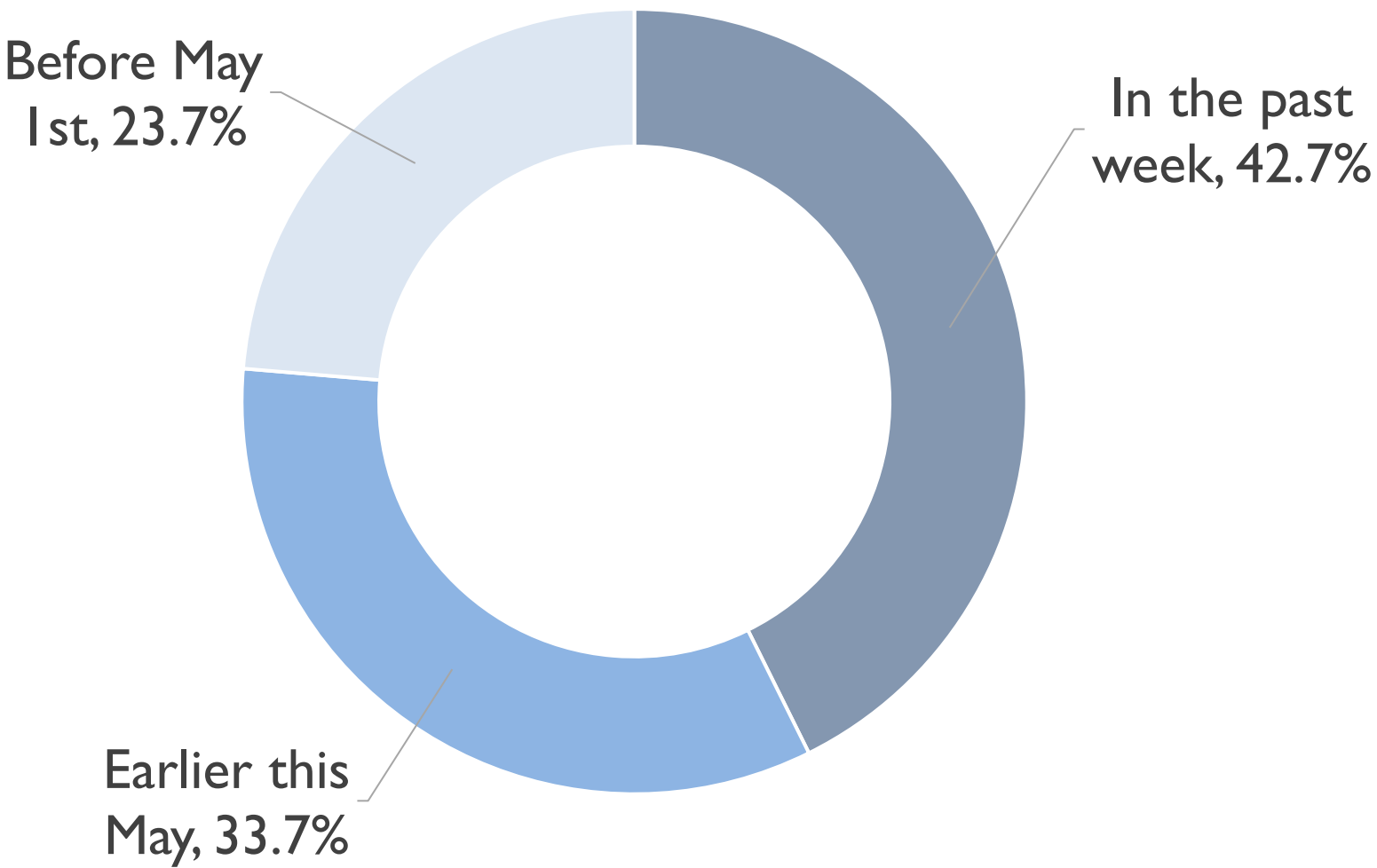
Americans Who Took a Trip Memorial Day Weekend



Question: Are you taking a trip the Memorial Day weekend?

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)

When Memorial Day Weekend Trip Was Decided
(% of Americans who took a trip)

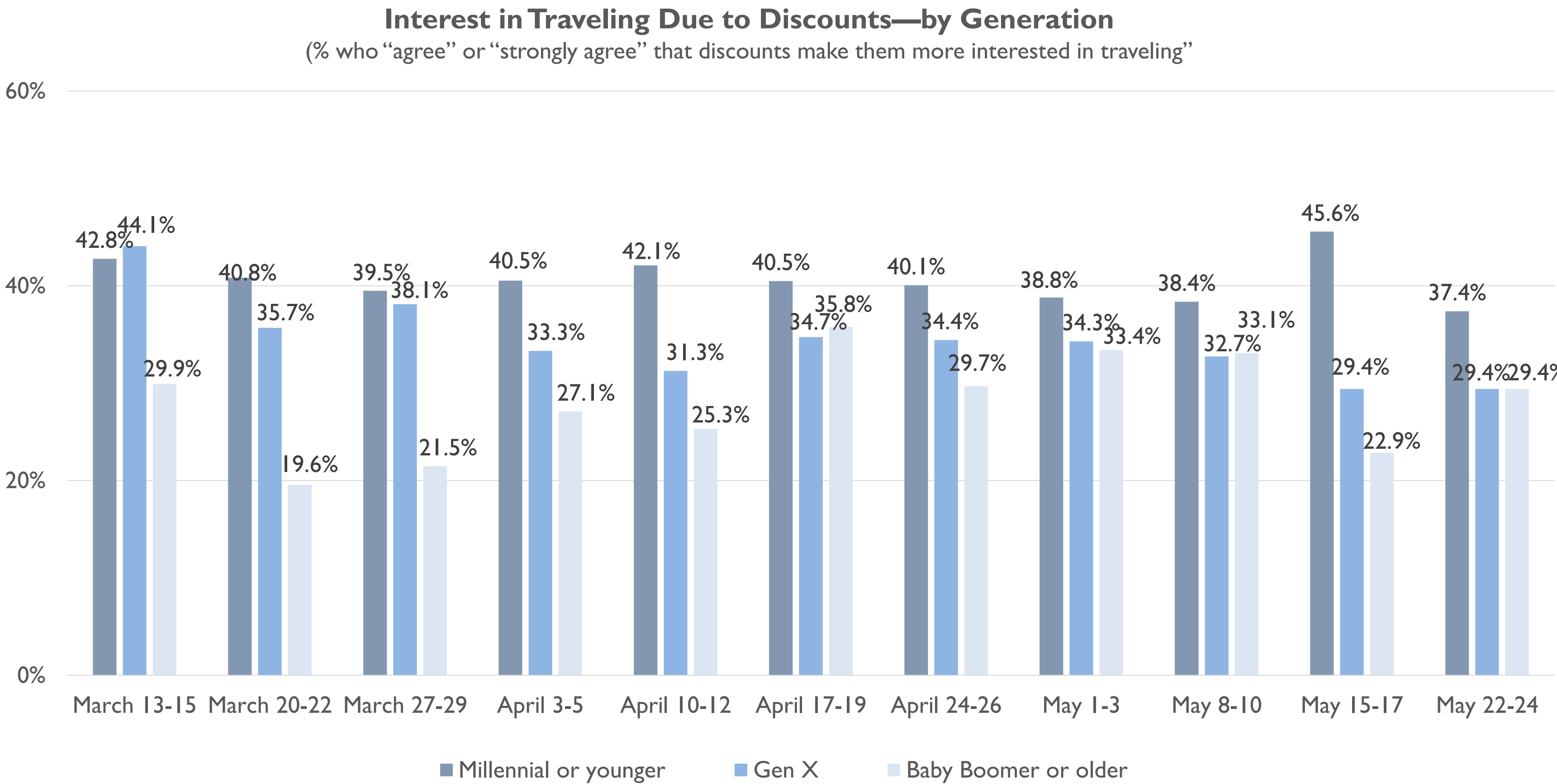


Question: When did you decide to take this trip? (Select one)

(Base: Wave 11 respondents taking a Memorial Day weekend trip. 74 completed surveys. Data collected May 22-24, 2020)

Interest in Traveling Due to Discounts

Younger travelers will very likely be key to many destinations’ and travel providers’ recovery. Last week we reported that Millennial travelers will be at the forefront of the industry’s recovery, due to their relatively higher sense of safety for themselves and travel activities, combined with the ability to motivate them to travel with discounts—things that we continue to see this week.

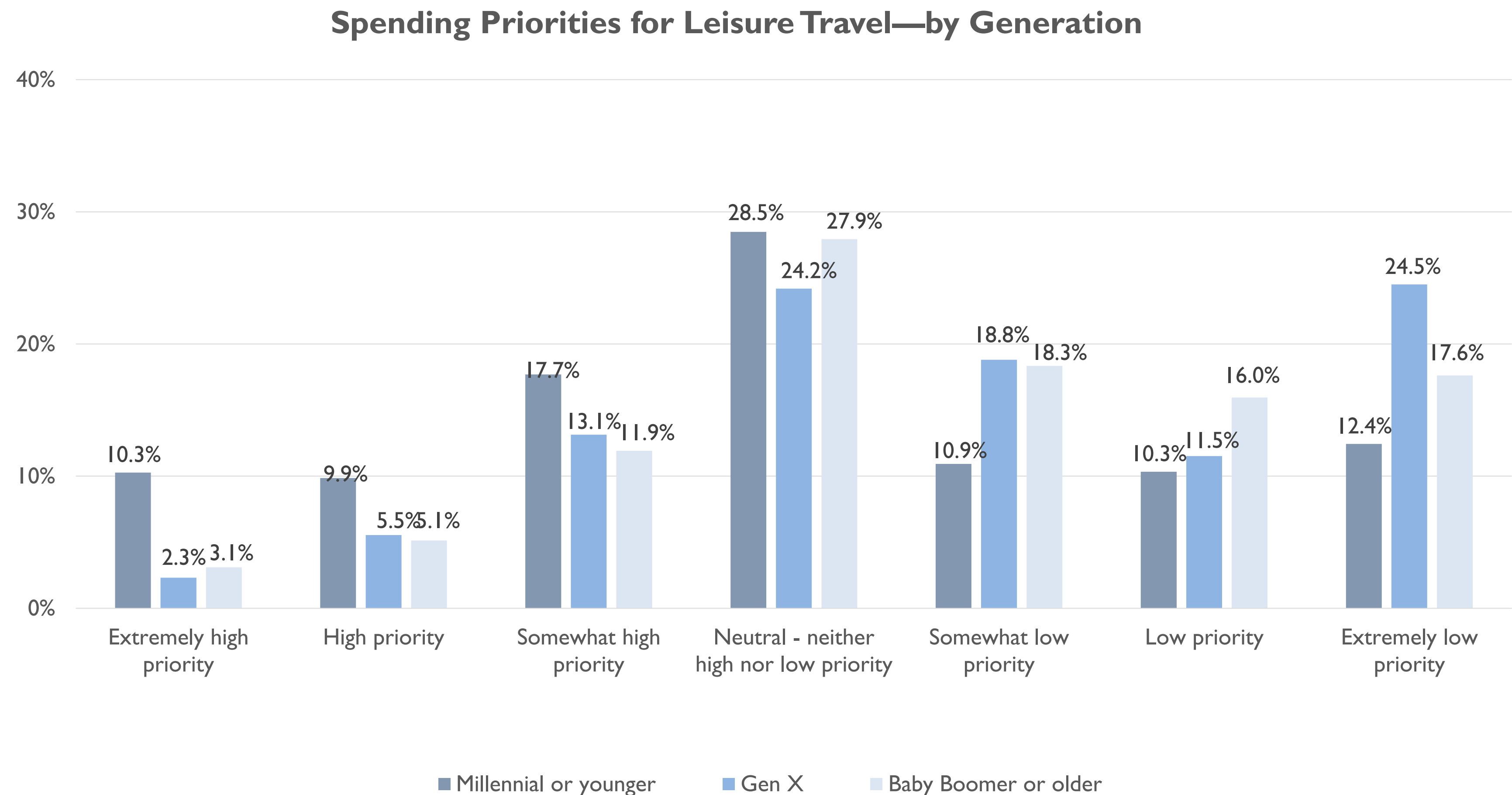


Question: How much do you agree with the following statement?
Statement: The Coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212 and 1,223 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 and 22-24, 2020)

Spending Priorities for Leisure Travel

Nearly 40 percent of Millennial travelers report they will make travel at least a somewhat high priority in their lifestyle—double the number of Baby Boomers who said the same—and plan to spend \$3,000 on leisure travel in the next three months--\$1,000 more than Baby Boomers report. They also plan to visit a more diverse set of destinations in the next year.



Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.
Leisure travel will be a...

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)



Coronavirus Travel Sentiment Index

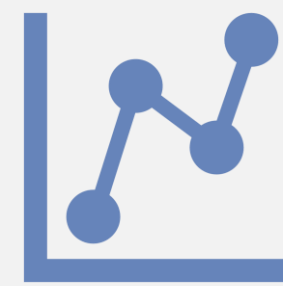
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 25th

What is a Predictive Index?



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



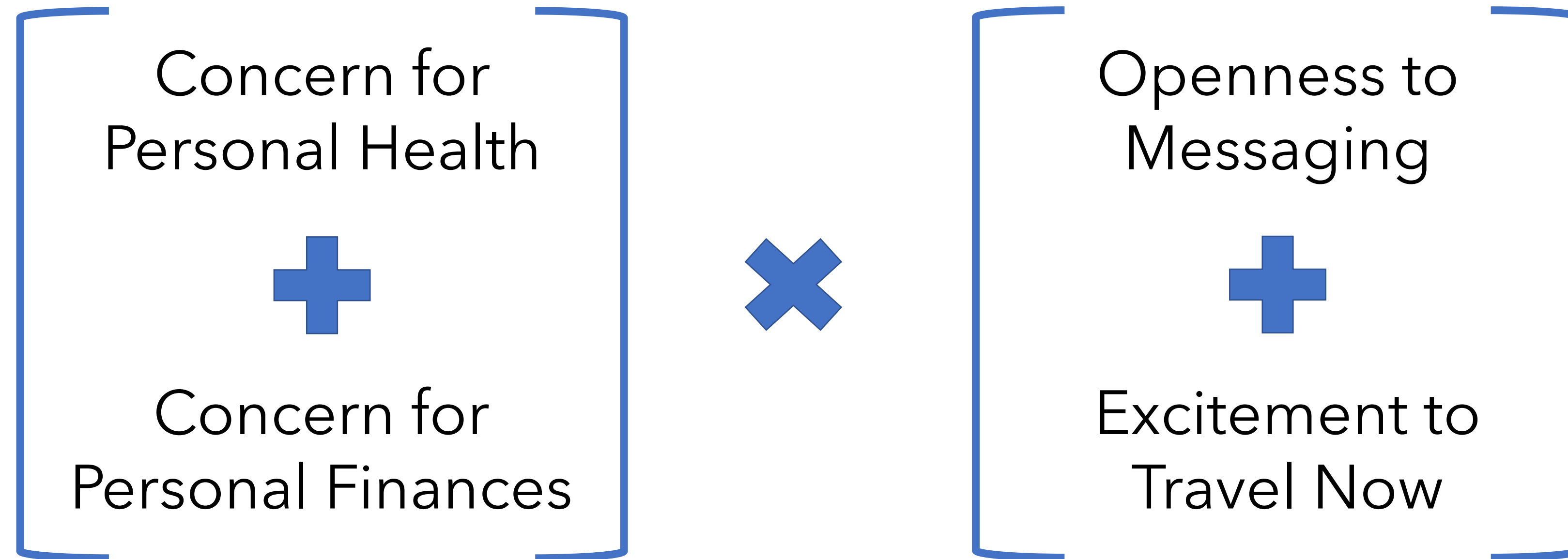
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

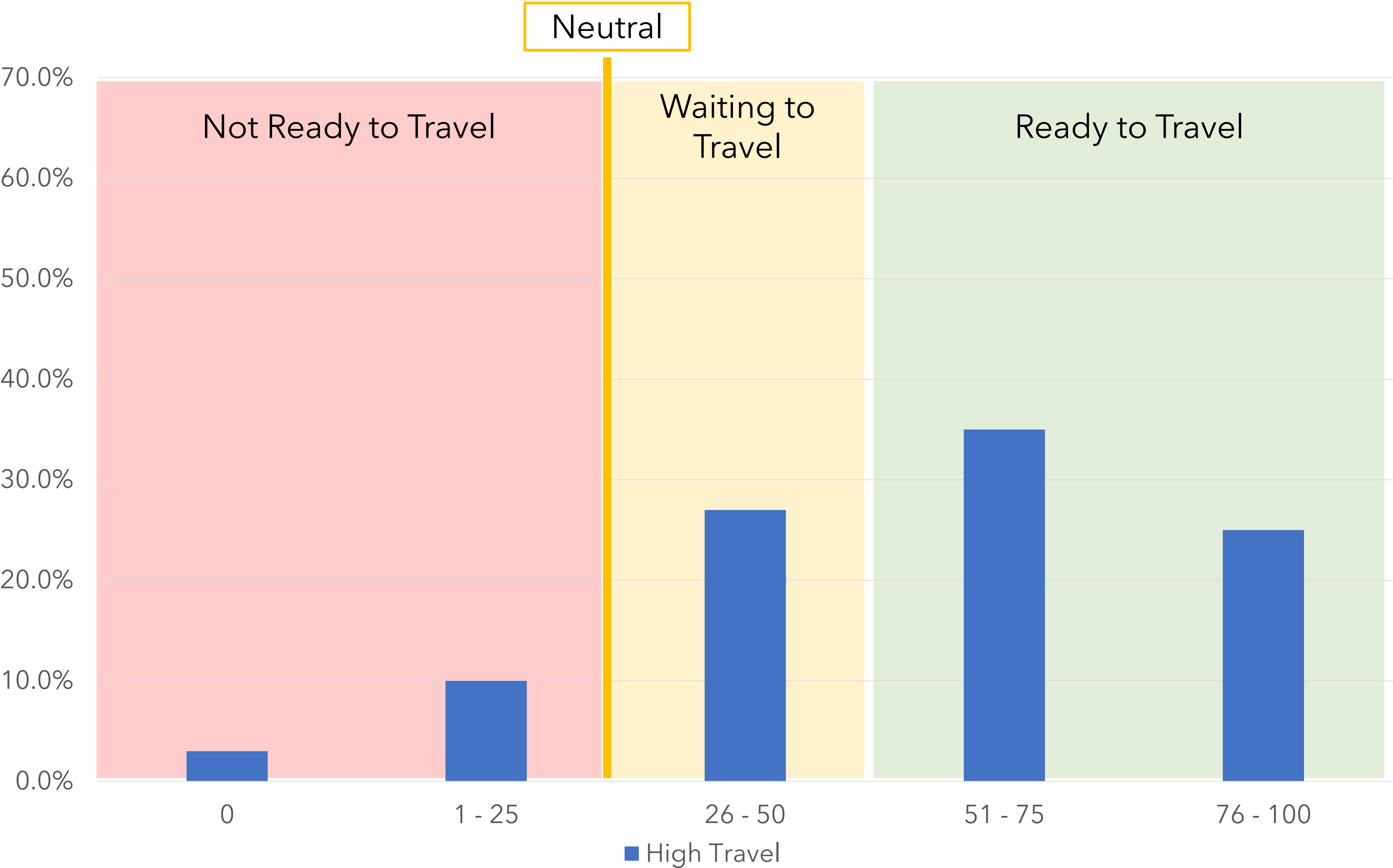
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

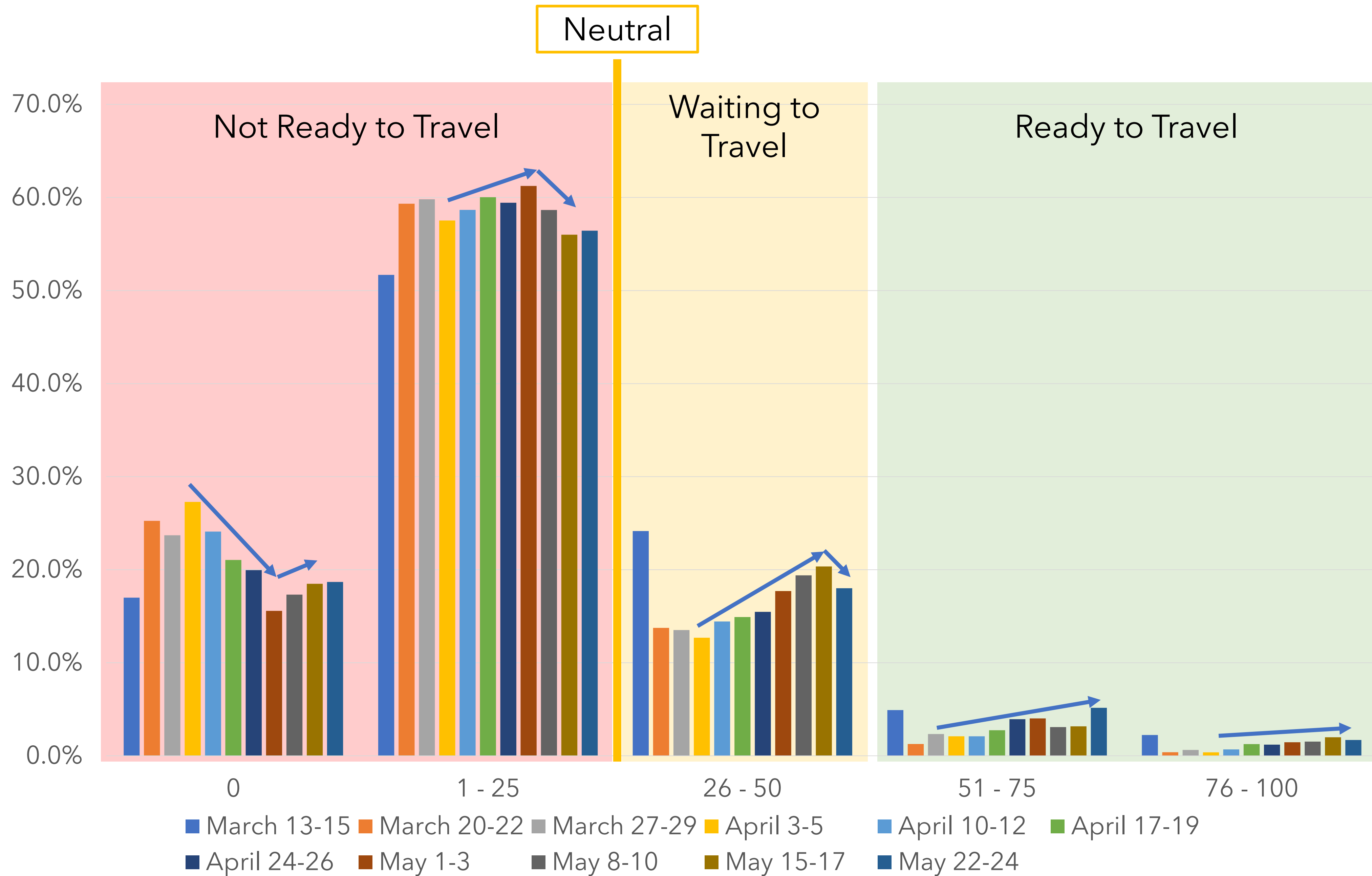


*Normalized to a 100pt scale

Healthy Travel Outlook



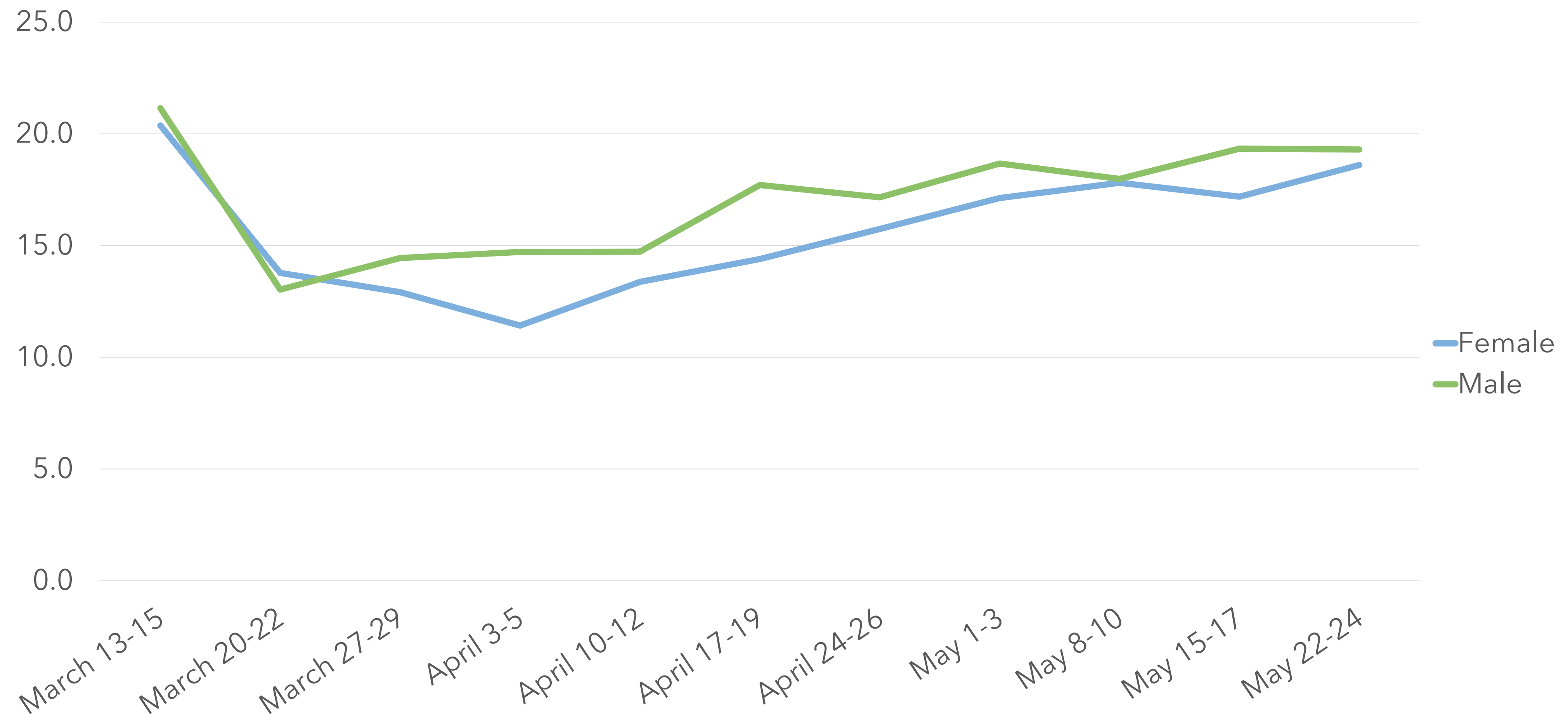
Travel Outlook: Week of May 25th



Gender

Points of Interest:

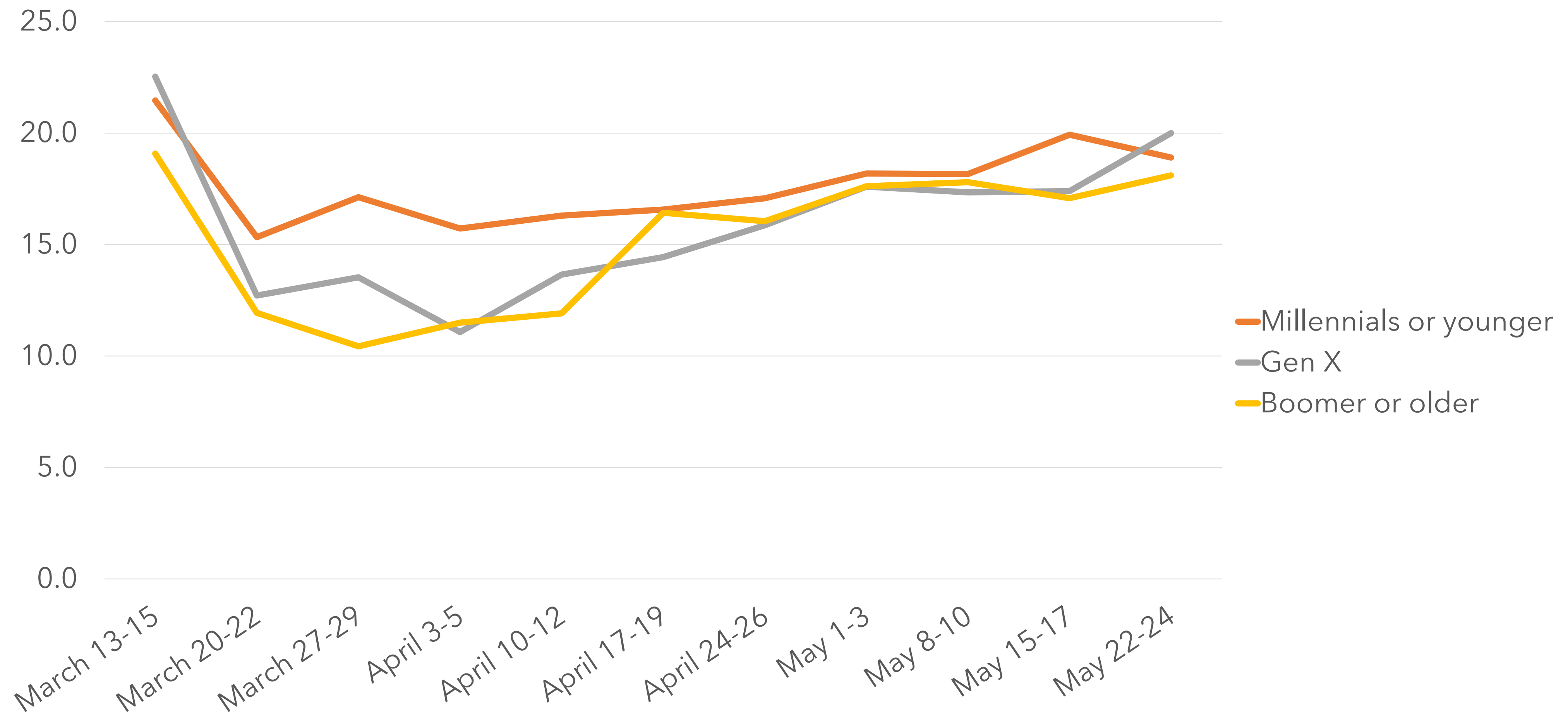
- Women continue to report higher levels of safety and financial concerns than Men this week, though concerns for both groups show slight drops.
- A third of women this week again said they have no plans to travel in 2020 (35.2% up from 33.2%) while only a quarter of men (28.8% up from 26.0%) said the same.



Generation

Points of Interest:

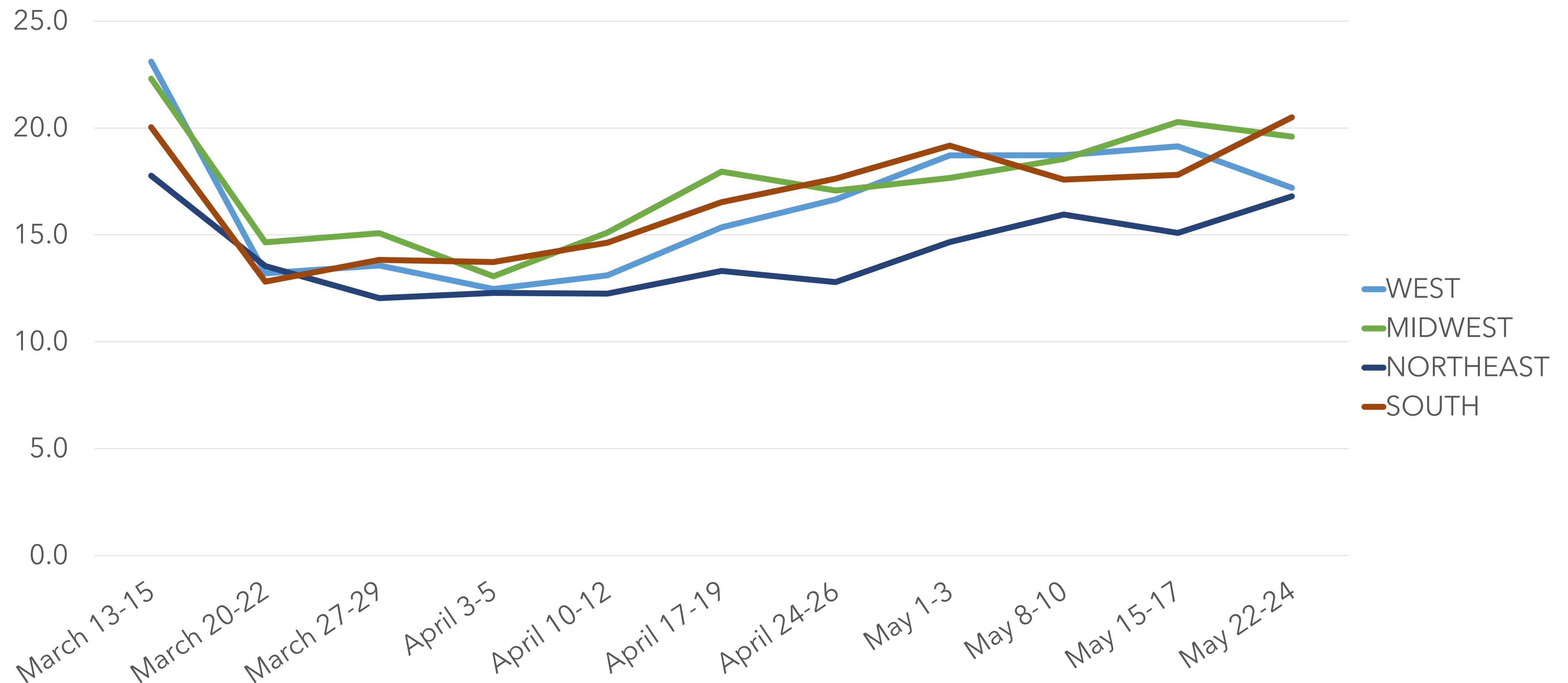
- While Millennials and Boomers reported concern levels similar to previous waves, this week Gen X showed a slight drop in safety concerns.
- Contrasting from previous weeks, Gen X and Boomers rather than Millennials this week show the most optimism for the severity of the coronavirus situation.



US Region

Points of Interest:

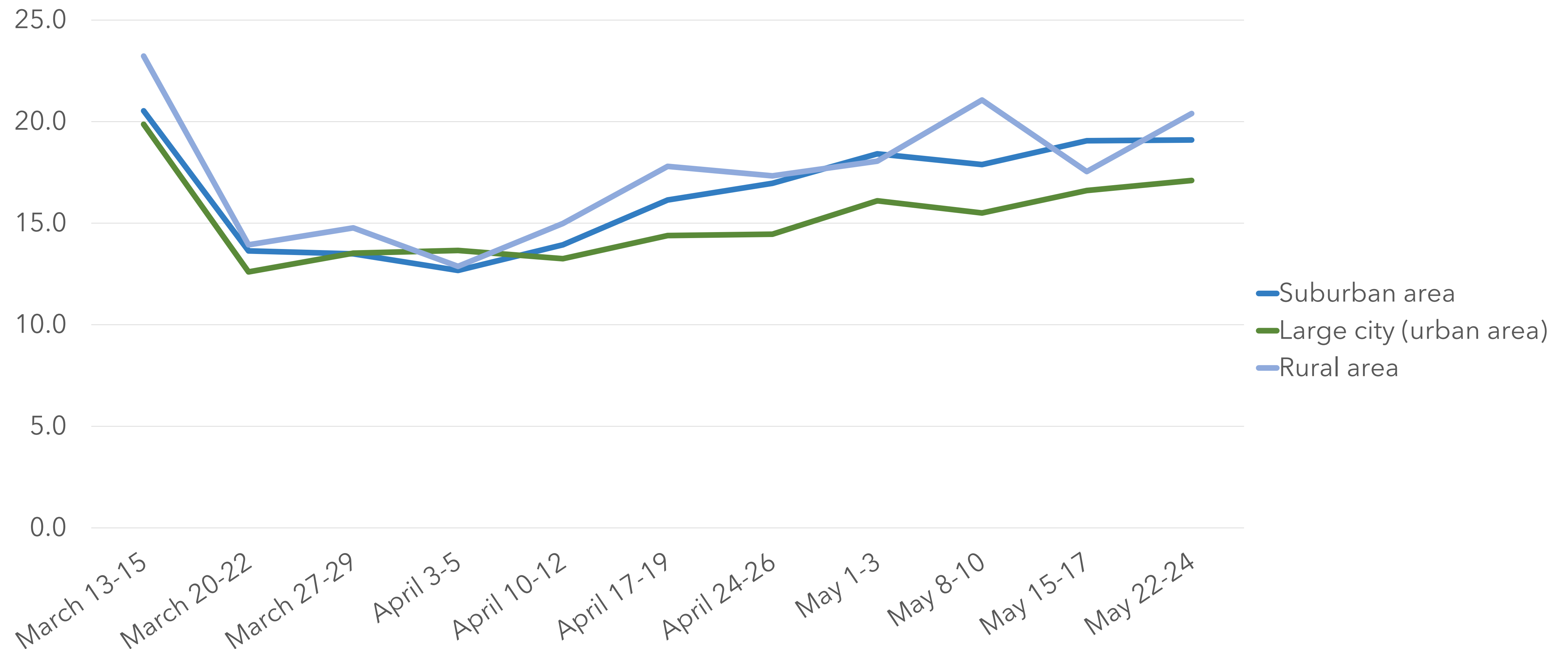
- Safety concerns in the West grew again this week while similar concerns dropped in the South.
- Financial concerns grew in the West and Midwest and dropped in the Northeast and South.
- The South reported their biggest drop this week in openness to travel messaging, but even still remains more open than the Midwest and Northeast.



Type Of Residence

Points of Interest Impacting Index Scores:

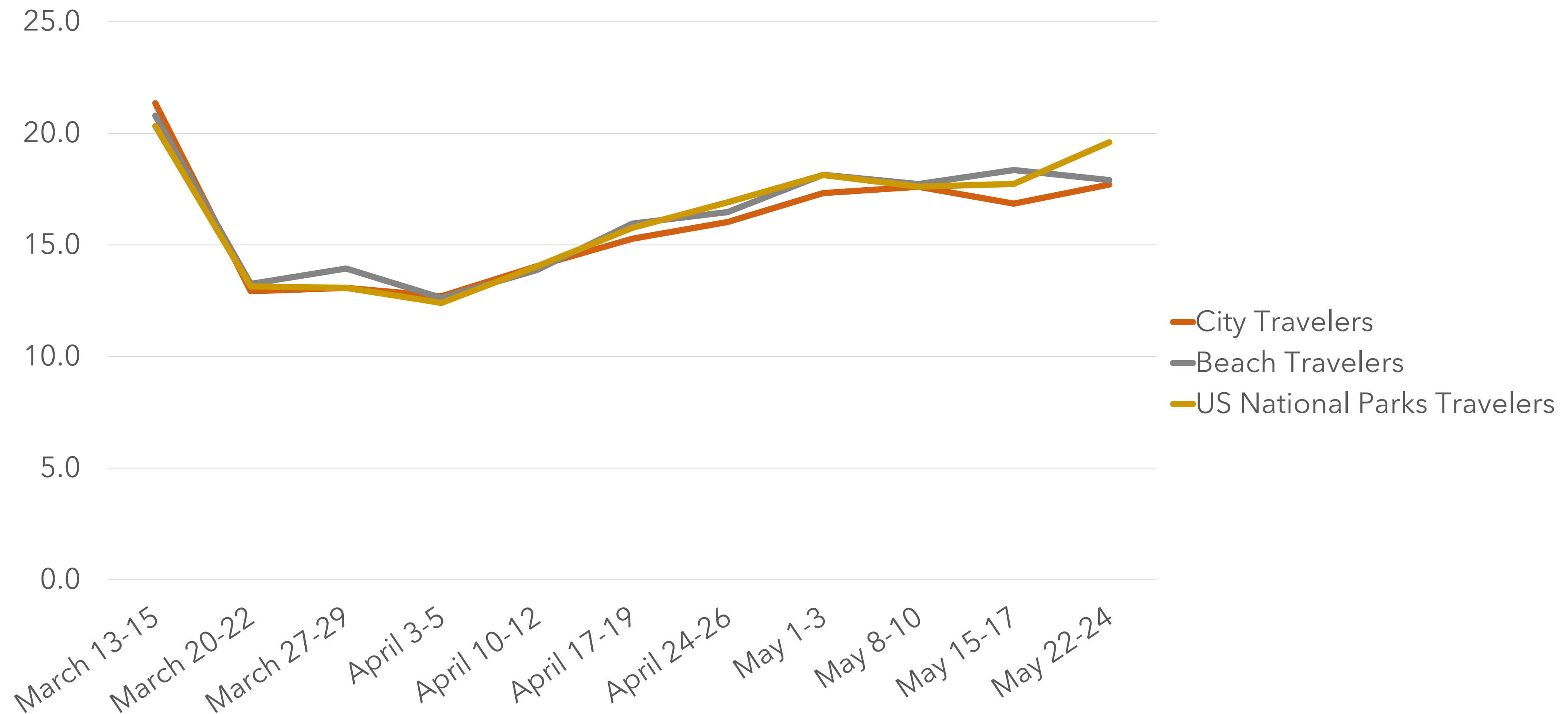
- Urban respondents returned to being the most concerned with both personal safety and financial wellbeing this week.
- Even with the highest concerns, Urban respondents reported being the most excited to travel and are tied with Rural respondents for the most open to messaging.



Favorite Destination Types

Points of Interest:

- Travelers who love National Parks reported the lowest comparative levels of safety concerns this week.
- National Park travelers also show the most optimism this week that the Coronavirus situation will improve.
- Beach travelers followed by National Park travelers report being likely to travel the furthest on their next road trip.





Benchmarking Traveler Sentiment

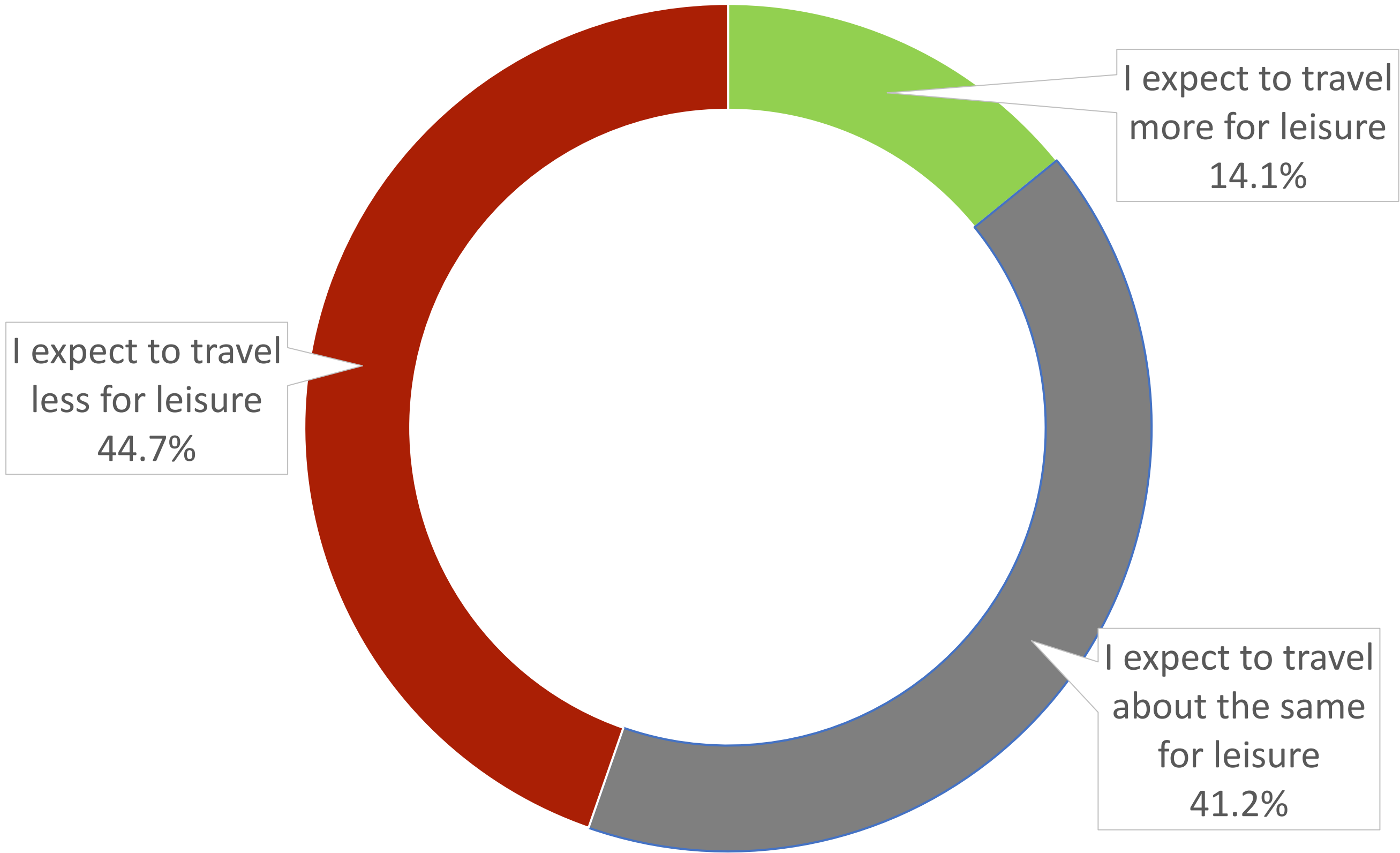
Destination Analysts' *The State of the American Traveler Study*—begun in 2006—tracks traveler sentiment each quarter—most recently in January 2020. In this week's Coronavirus Travel Sentiment Index study, we asked several identical questions to our *The State of the American Traveler Study* in order to benchmark how travelers feel now compared to in the past. These are presented following.

Leisure Travel Expectations (Trips Taken)

The proportion of leisure travelers who report that they will decrease the number of trips they will take, compared to the past 12 months, has skyrocketed in the past 4 months. Now, nearly half (44.7%) say they will travel less this year. In January, this figure stood at 8.7 percent.

Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)

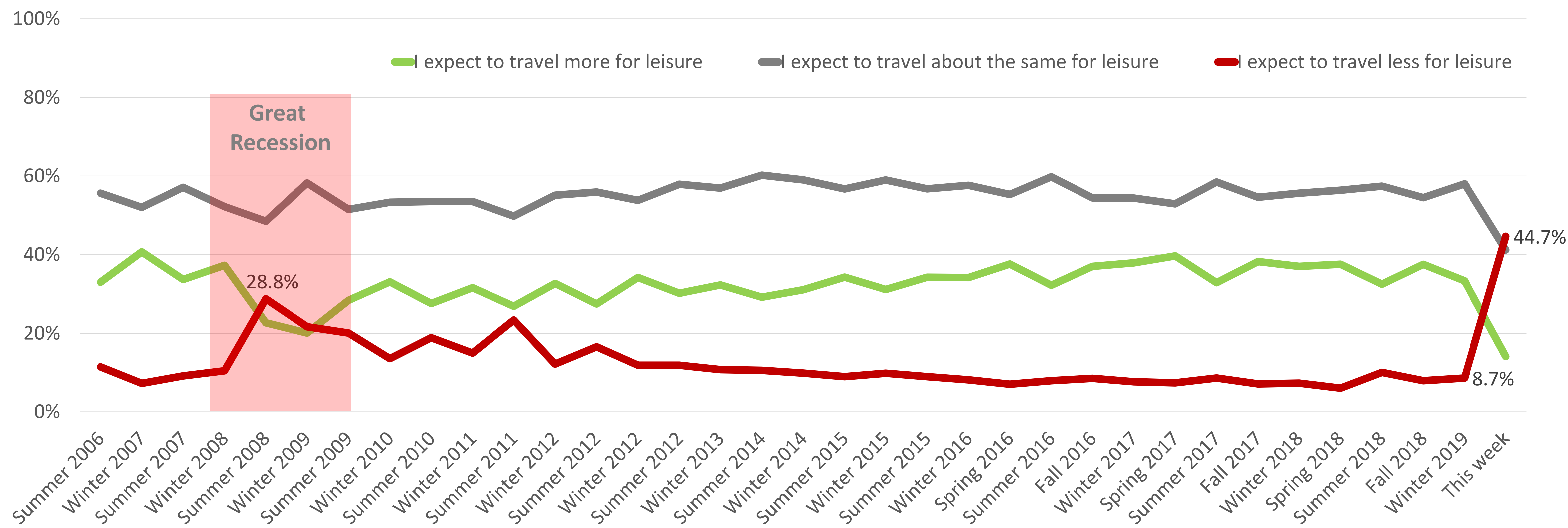
*(Base: Wave 11. 1,223 completed surveys.
Data collected May 22-24, 2020)*



Historical Perspective: Leisure Travel Expectations (Trips Taken)

Prior to this week, the highest recorded percentage of American travelers to say they would be taking LESS leisure trips in the coming year compared to the previous year was in July 2008, as the Great Recession loomed.

Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?

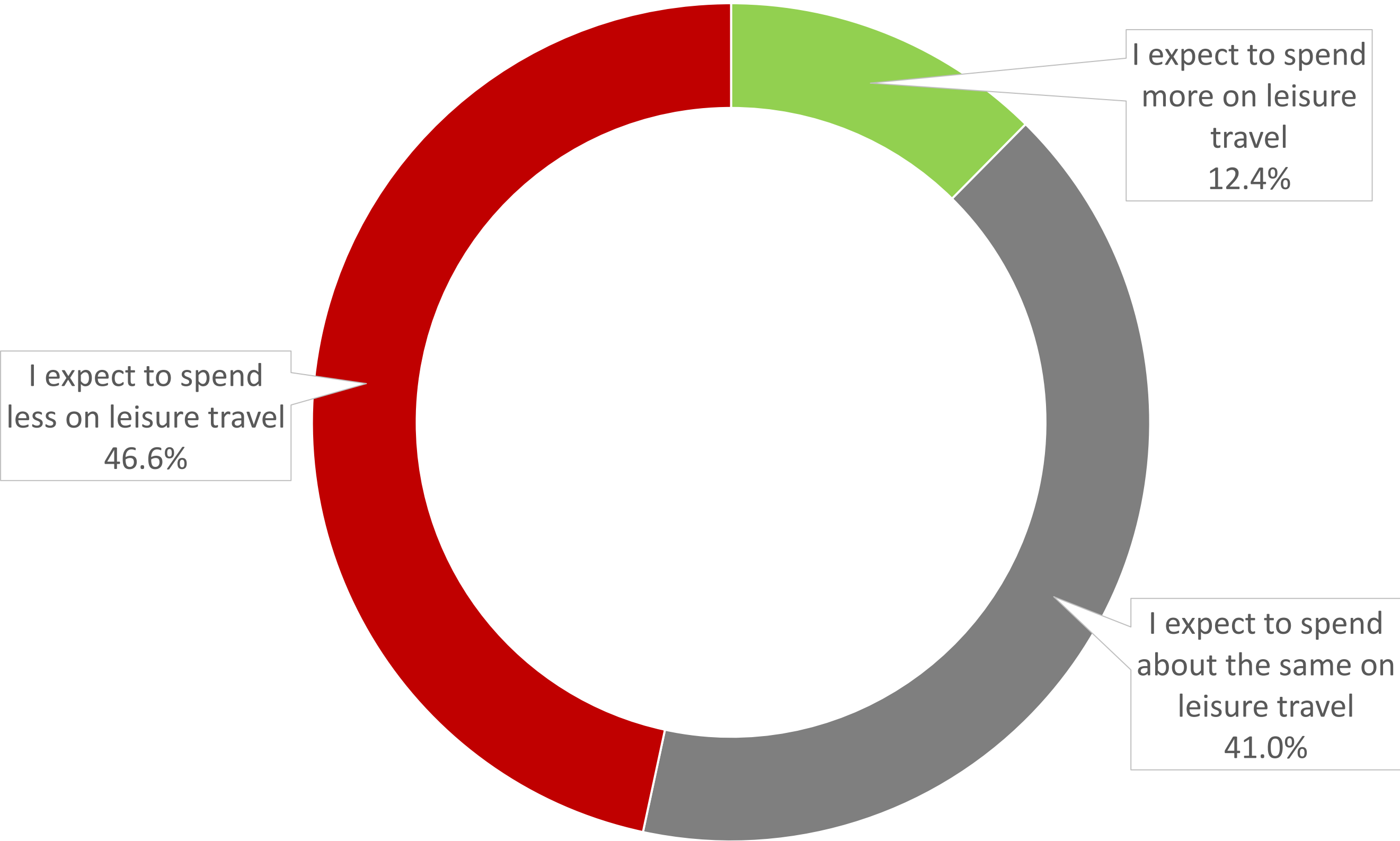


Leisure Travel Expectations (Spending)

The percent of leisure travelers who reports that they will decrease their travel spending this year compared to the past 12 months has also grown sharply. Now, 46.6 percent say they will reduce their travel spending. In January, this figure stood at 10.7 percent.

Question: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period? (Select one)

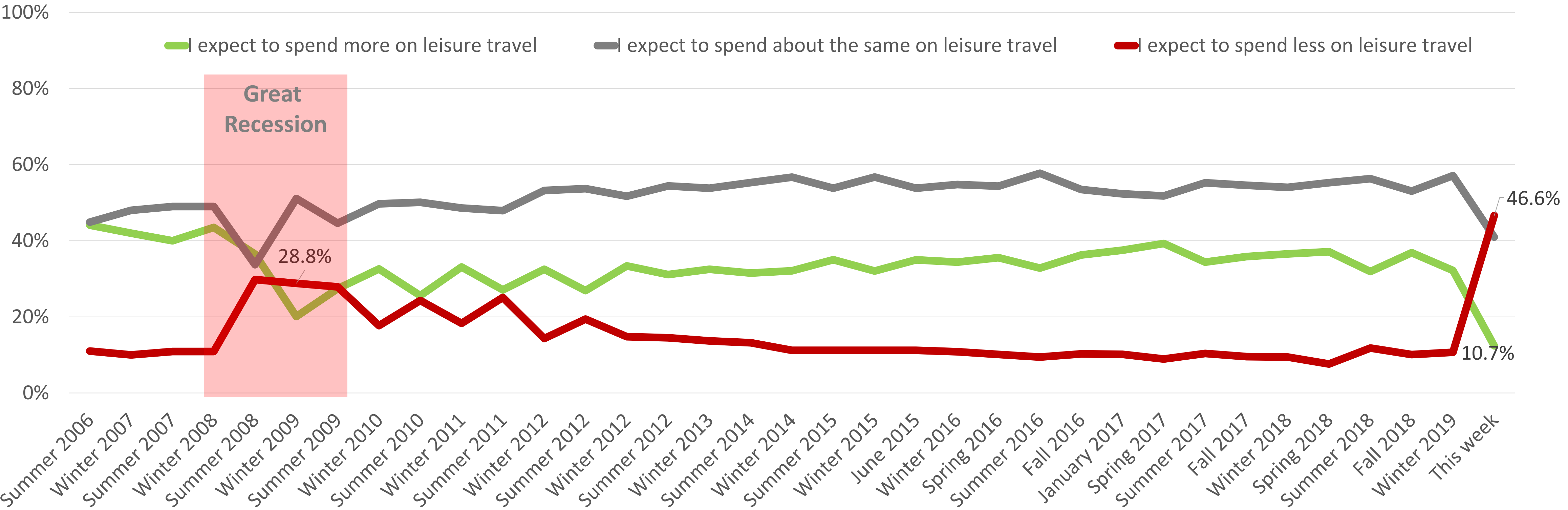
(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)



Historical Perspective: Leisure Travel Expectations (Spending)

Prior to this week, the highest recorded percentage of American travelers to say they would be spending LESS on leisure trips in the coming year compared to the previous year was 28.8 percent, during the Great Recession.

Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?

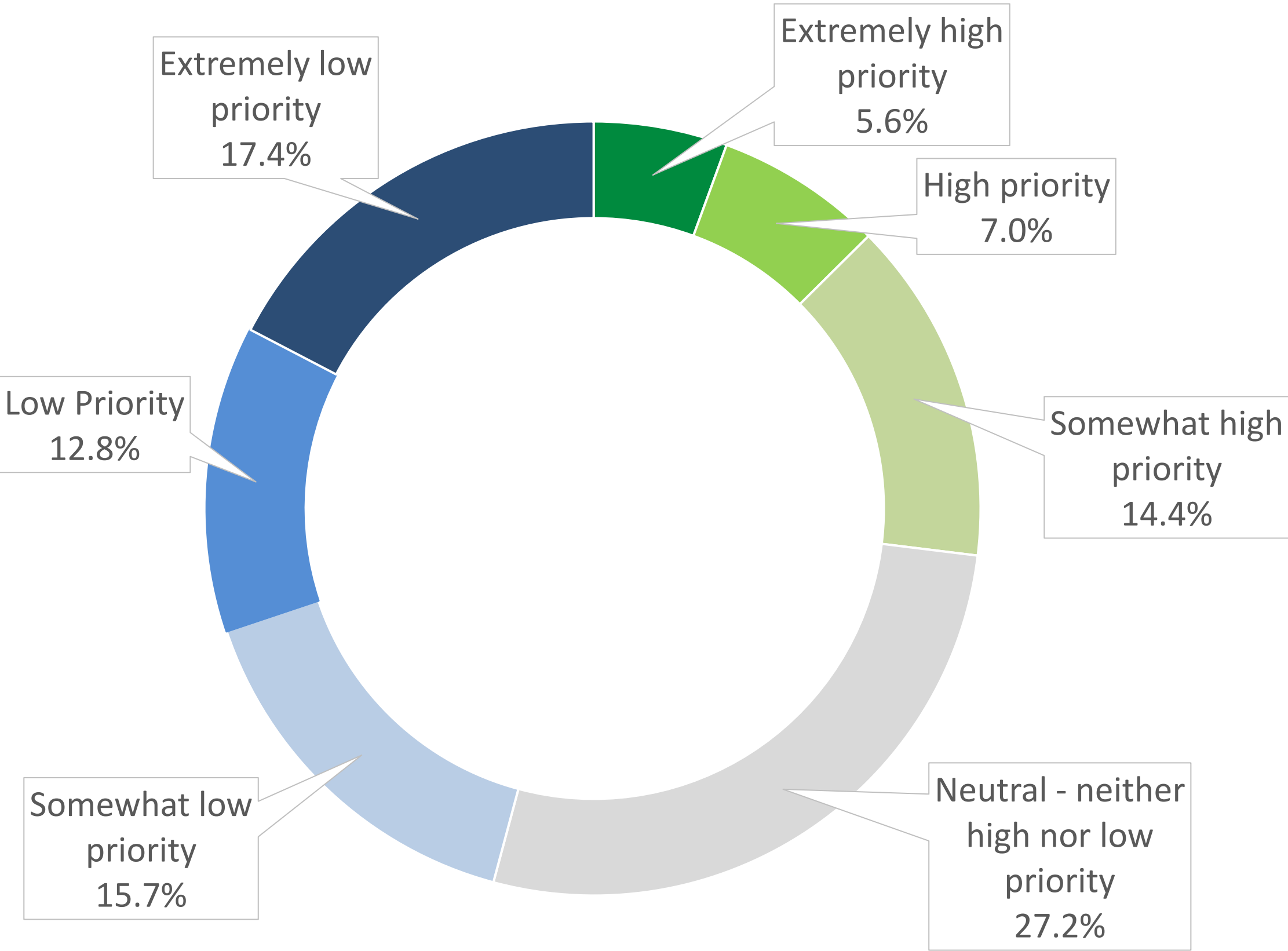


Leisure Travel as a Budget Priority

Four months ago, 59.6 percent of travelers said that leisure travel would be at least somewhat of a budget priority in the coming year. Now, only 26.9 percent agrees. For perspective, back in January 2018, 65.3 percent said they would prioritize leisure travel in their spending (shown on the following page).

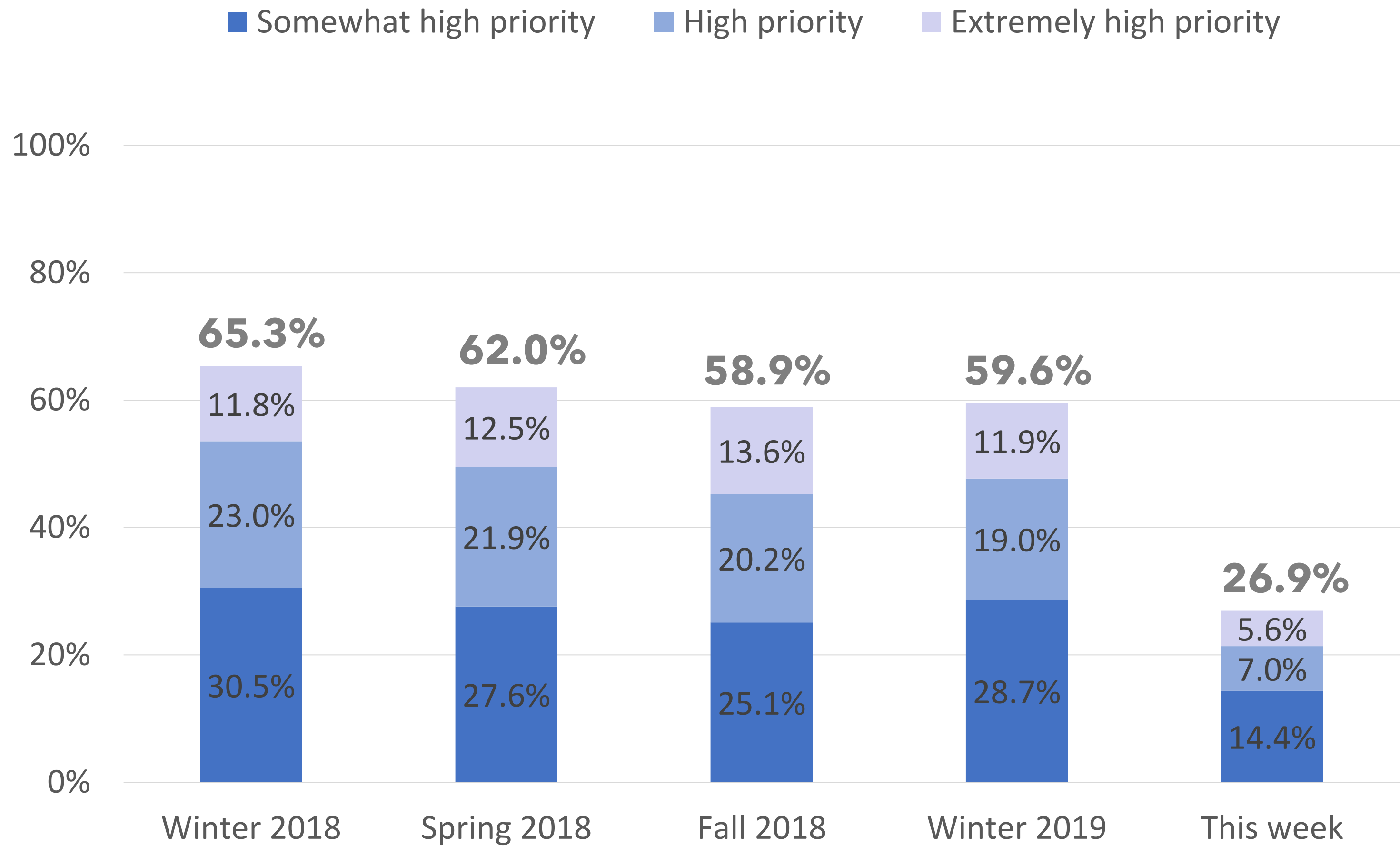
Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

*(Base: Wave 11. 1,223 completed surveys.
Data collected May 22-24, 2020)*



Historical Perspective: Leisure Travel as a Budget Priority

Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in the next year.



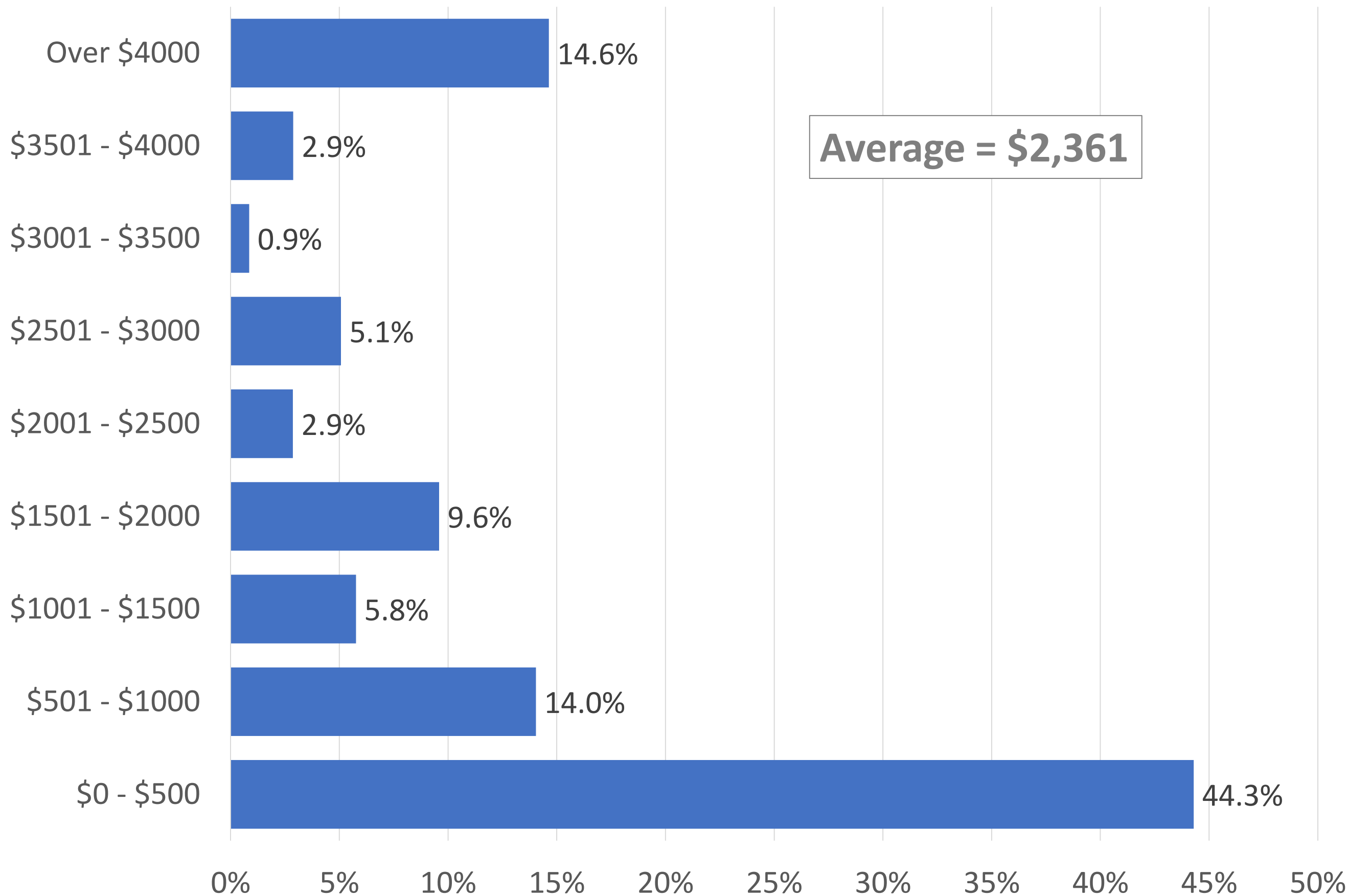
(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

Expected Leisure Travel Spending (Next 12 Months)

Right now, the typical American traveler expects to spend \$2,361 in the next 12 months on leisure travel, down 35 percent from January when the result was \$3,649. In total, 44.3 percent say they are going to spend less than \$500 on leisure travel this year—a 5-year high—and just 14.6 percent say they will spend more than \$4,000—a 5-year low (shown on next page).

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

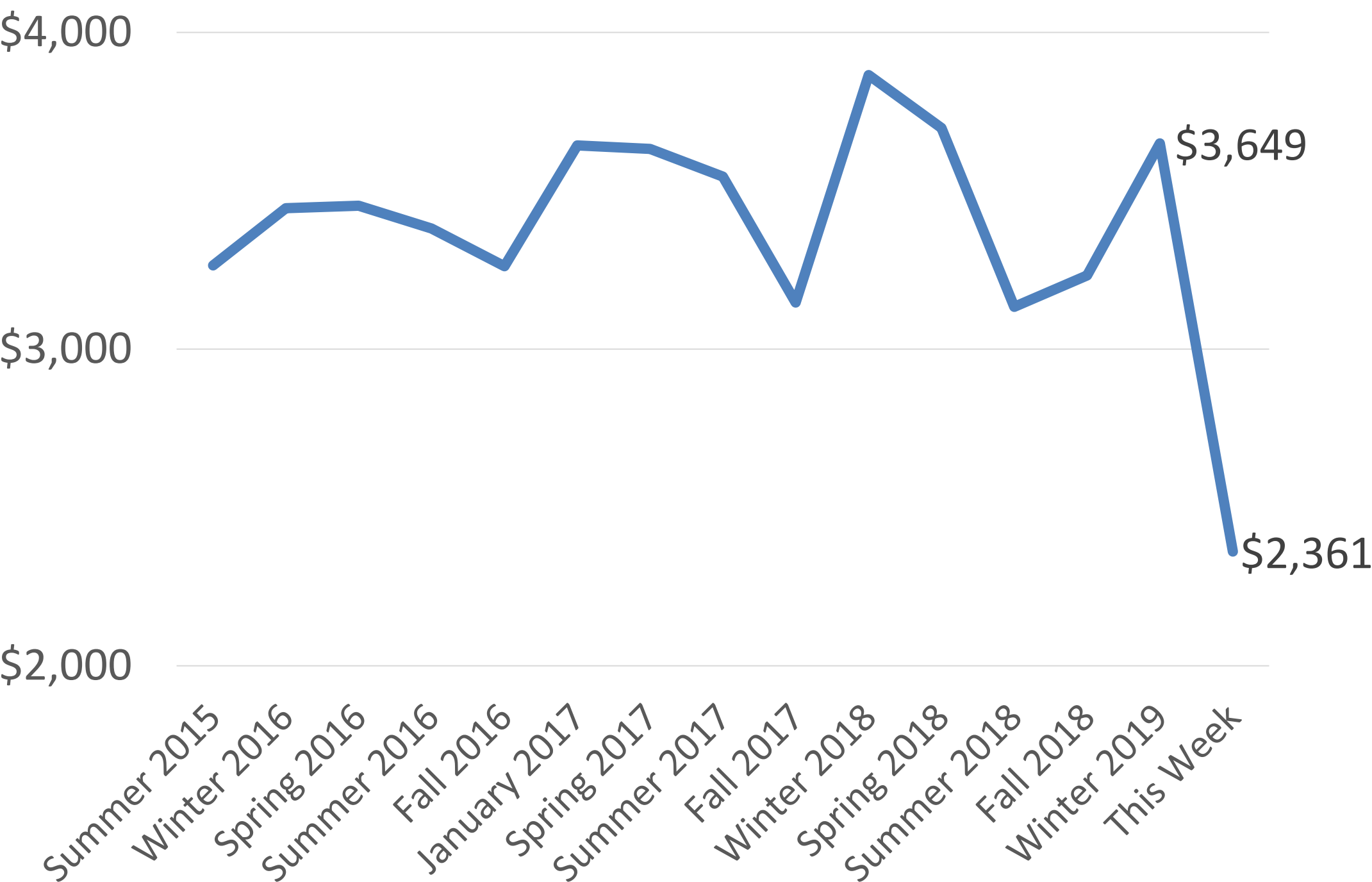
*(Base: Wave 11. 1,223 completed surveys.
Data collected May 22-24, 2020)*



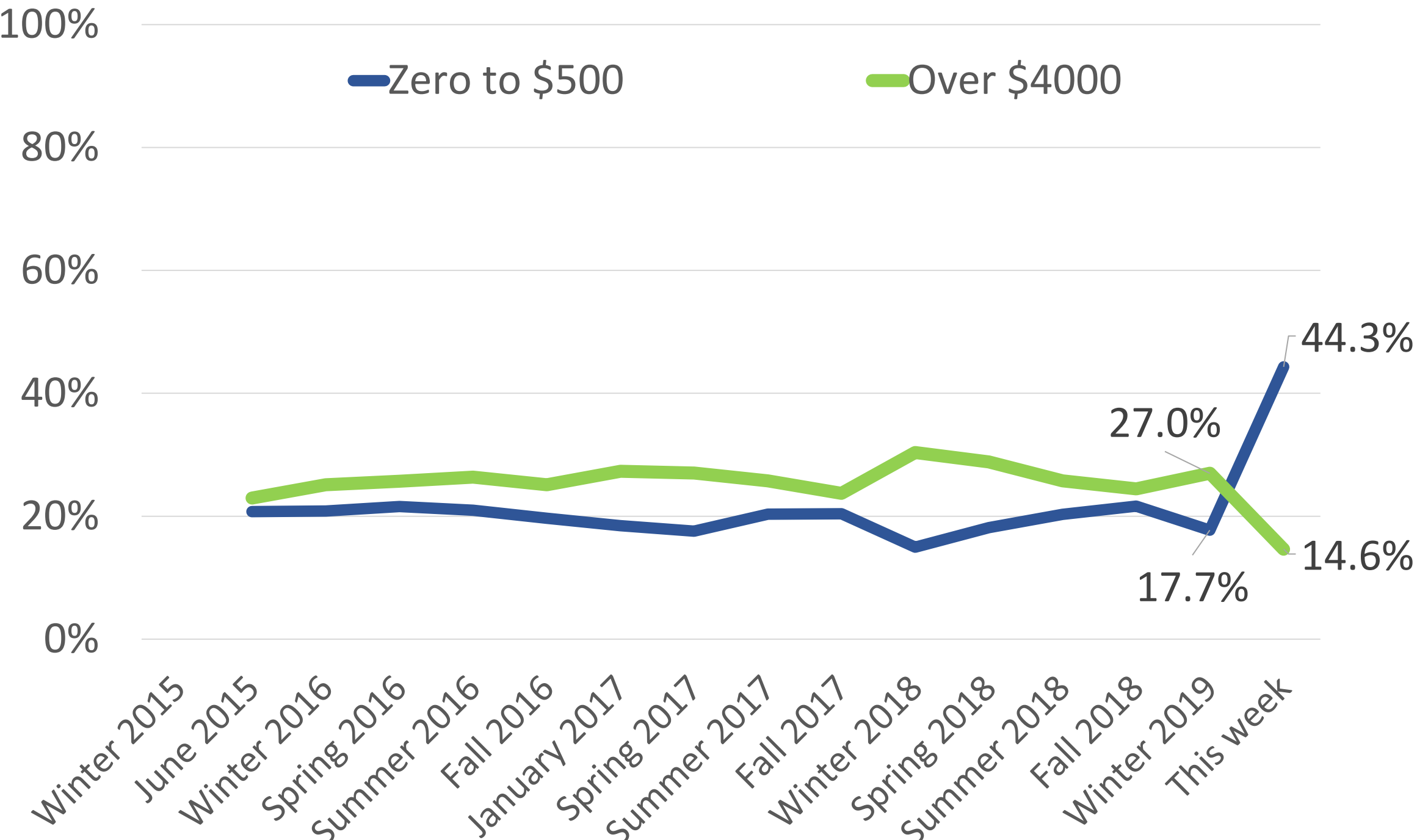
Expected Leisure Travel Spending (Next 12 Months)

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

Average Expected Spending



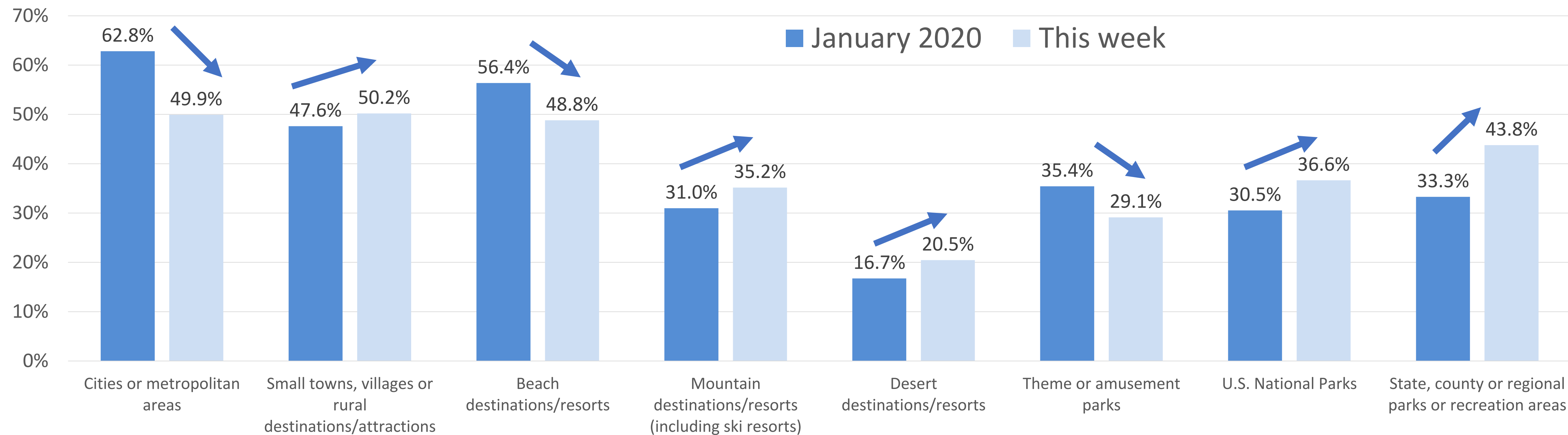
% in the Highest/Lowest Spending Categories



Leisure Travel by Destination Type (Intent to Visit, Next 12 Months)

Compared to January, more American travelers are planning to visit small towns, mountain and desert destinations, and National and other parks. Fewer Americans plan to visit large cities, beach destinations and theme or amusement parks.

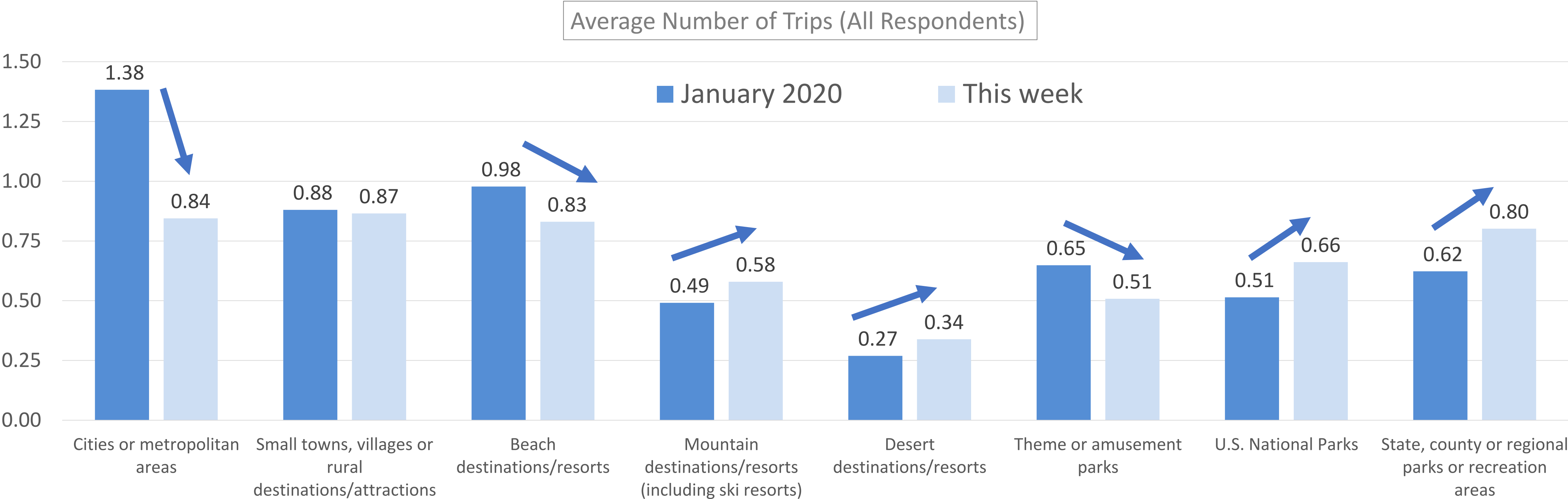
Question: In the next 12 months, HOW MANY TRIPS will you take that will include each of the following types of leisure destinations?



Leisure Travel by Destination Type (Expected # of Trips in the Next 12 Months)

Not only are more travelers planning to visit National and other parks, the average number of trips they plan to take is greater, compared to only four months ago. The number of trips Americans expect to take to cities, beaches and theme/amusement parks has fallen.

Question: In the next 12 months, HOW MANY TRIPS will you take that will include each of the following types of leisure destinations?

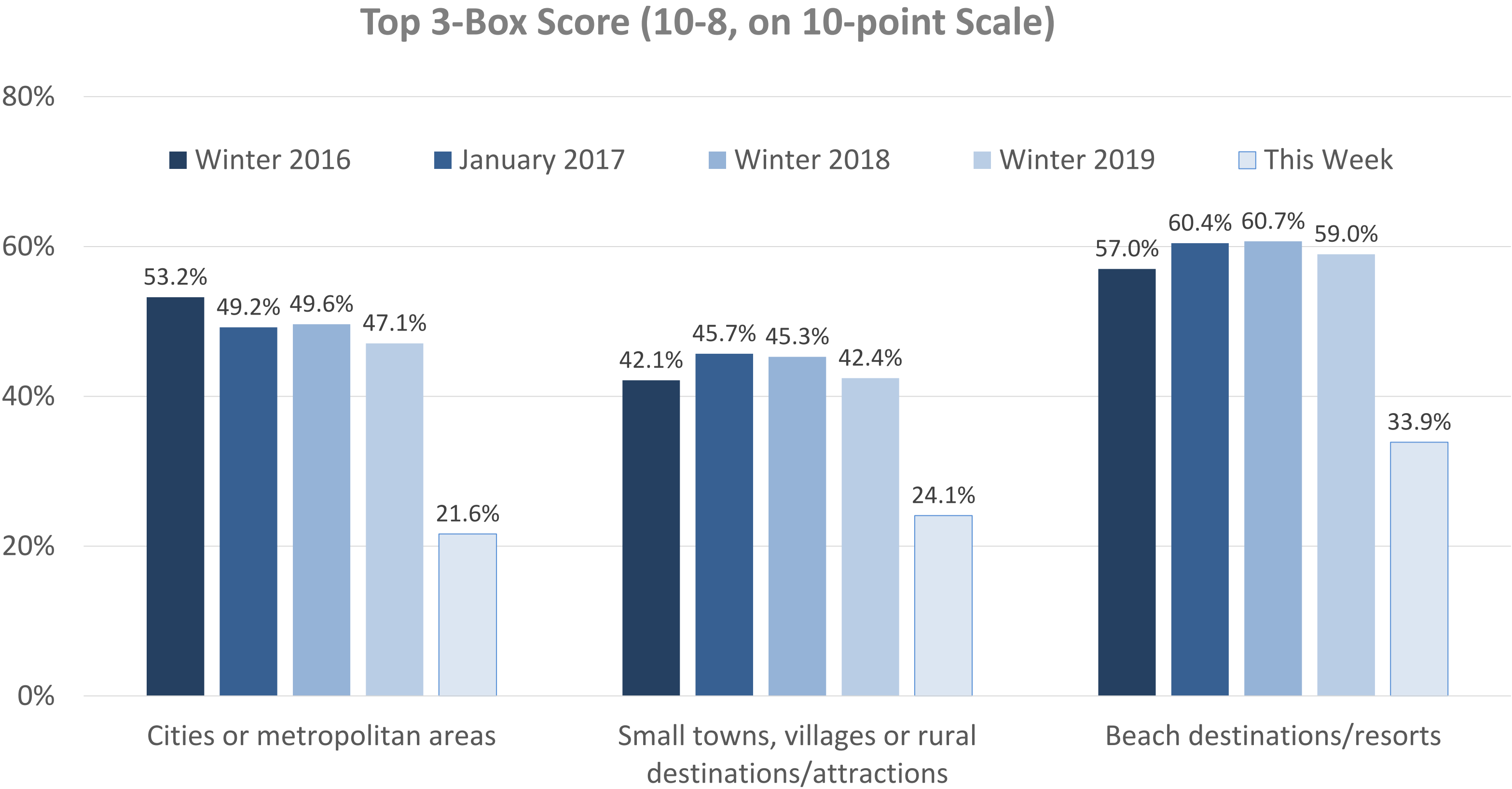


Excitement for Each Destination Type (Top 3-Box Score)

Despite the travel patterns described, when asked how excited they were to visit all destination types, excitement levels are much lower than they were in January.

Question: Thinking carefully about the destinations you are MOST EXCITED TO VISIT IN THE NEXT TWELVE (12) MONTHS for leisure reasons.

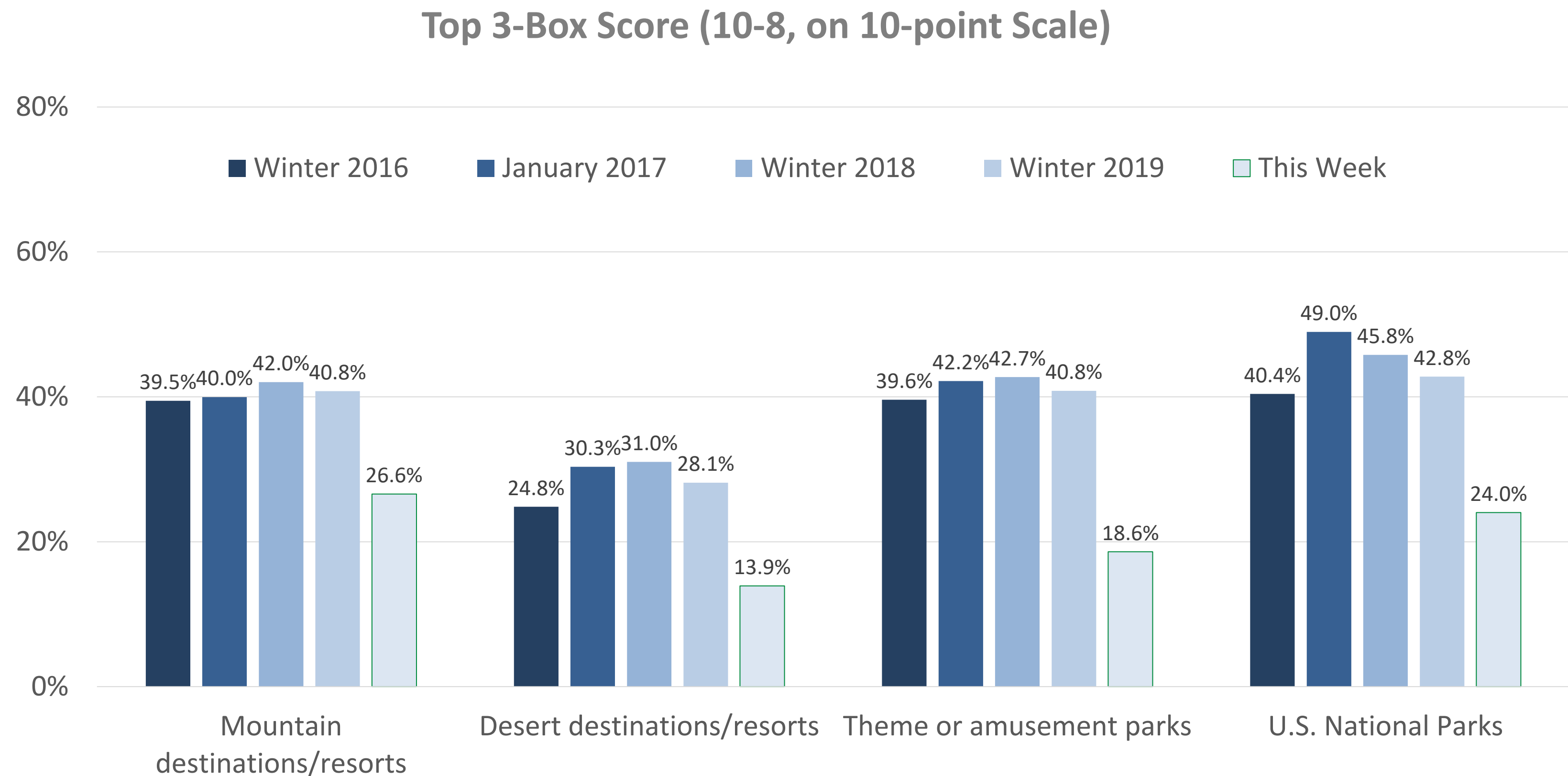
Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year?



Excitement for Each Destination Type (Top 3-Box Score)

Question: Thinking carefully about the destinations you are **MOST EXCITED TO VISIT IN THE NEXT TWELVE (12) MONTHS** for leisure reasons.

Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year?



General Interest in Travel Experiences (Top 2-Box Score)

Interest in all types of travel experiences is greatly muted at the moment. In January and this past week, American travelers were asked about their general interests in various travel experiences. Sadly, all travel experiences are of less interest now than four months ago.

Question: In general how interested are you in taking LEISURE TRIPS which would include the following.

Top 2-Box Score (Interested or Very interested)	January 2020	This Week	% CHNG
Enjoying scenic beauty	73.2%	61.7%	-15.7%
Outdoor activities (warm weather)	68.0%	53.4%	-21.5%
Visits to beach destinations or resorts	65.1%	51.0%	-21.8%
Take Road Trips	60.3%	50.5%	-16.3%
Cuisine and food experiences	56.2%	47.4%	-15.6%
Visit U.S. National Parks	57.7%	46.7%	-19.2%
Visiting historical attractions	58.4%	46.5%	-20.5%
Visit State, local or regional parks	53.2%	45.2%	-15.0%
Small towns, villages or rural destinations/attractions	52.2%	40.6%	-22.2%
Big city experiences	46.0%	34.3%	-25.5%
Visits to mountain destinations/resorts (including ski resorts)	44.2%	34.1%	-22.8%
Attend Festivals and Special Events	45.9%	33.2%	-27.6%
Arts & culture	45.9%	31.7%	-31.0%
Visits to foreign countries	47.5%	30.4%	-36.0%
Theme or amusement parks	44.9%	30.1%	-33.0%
Visits to desert destinations or resorts	36.6%	23.8%	-34.9%
Outdoor activities (winter)	28.5%	23.1%	-19.1%

Drivers of Destination Aspiration (Top 3-Box Score)

The coronavirus pandemic appears to be draining much of the joy out of travel aspiration. Survey respondents were asked to name the destination they most wanted to visit in the next year (one that they reasonably expected to visit), and then asked to select from a list of reasons which represented why they aspired to visit that particular destination. Only two reasons saw increases—beaches/water sports and connecting with nature. American travelers are now less likely to say any other reasons were driving their travel aspirations.

Question: On the last page you said you would like to visit <<DESTINATION NAME>> in the next year.

Which of the following are reasons you want to visit <<DESTINATION NAME>> this year?

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

	January 2020	This Week	% CHNG
Beaches or water sports	20.1%	22.7%	13.4%
Connecting with nature	17.5%	18.2%	4.4%
Friends or family are there	32.8%	30.4%	-7.6%
Bucket list destination	11.5%	9.7%	-16.3%
Music scene	9.0%	7.3%	-19.2%
Romance	8.5%	6.7%	-21.1%
Adventure	20.8%	16.0%	-23.0%
Food & cuisine	27.0%	20.5%	-24.0%
Winter fun (skiing, snowboarding etc.)	4.4%	3.3%	-25.3%
Shopping	18.8%	13.7%	-27.1%
History	17.5%	12.7%	-27.4%
Arts & culture	14.3%	10.3%	-28.1%
General atmosphere	30.1%	21.4%	-28.7%
Visited before and want to return	36.2%	25.7%	-28.9%
It's mysterious or exotic	7.8%	5.5%	-29.3%
Nightlife	13.0%	9.2%	-29.5%
Special event, sporting event or festival	13.2%	8.8%	-33.5%
Theme or amusement park	16.5%	9.7%	-41.3%
Word of mouth	9.7%	4.9%	-49.6%

← Only two reasons increased between January to this week.
←



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