

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF APRIL 20TH, 2020



IMPORTANT

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

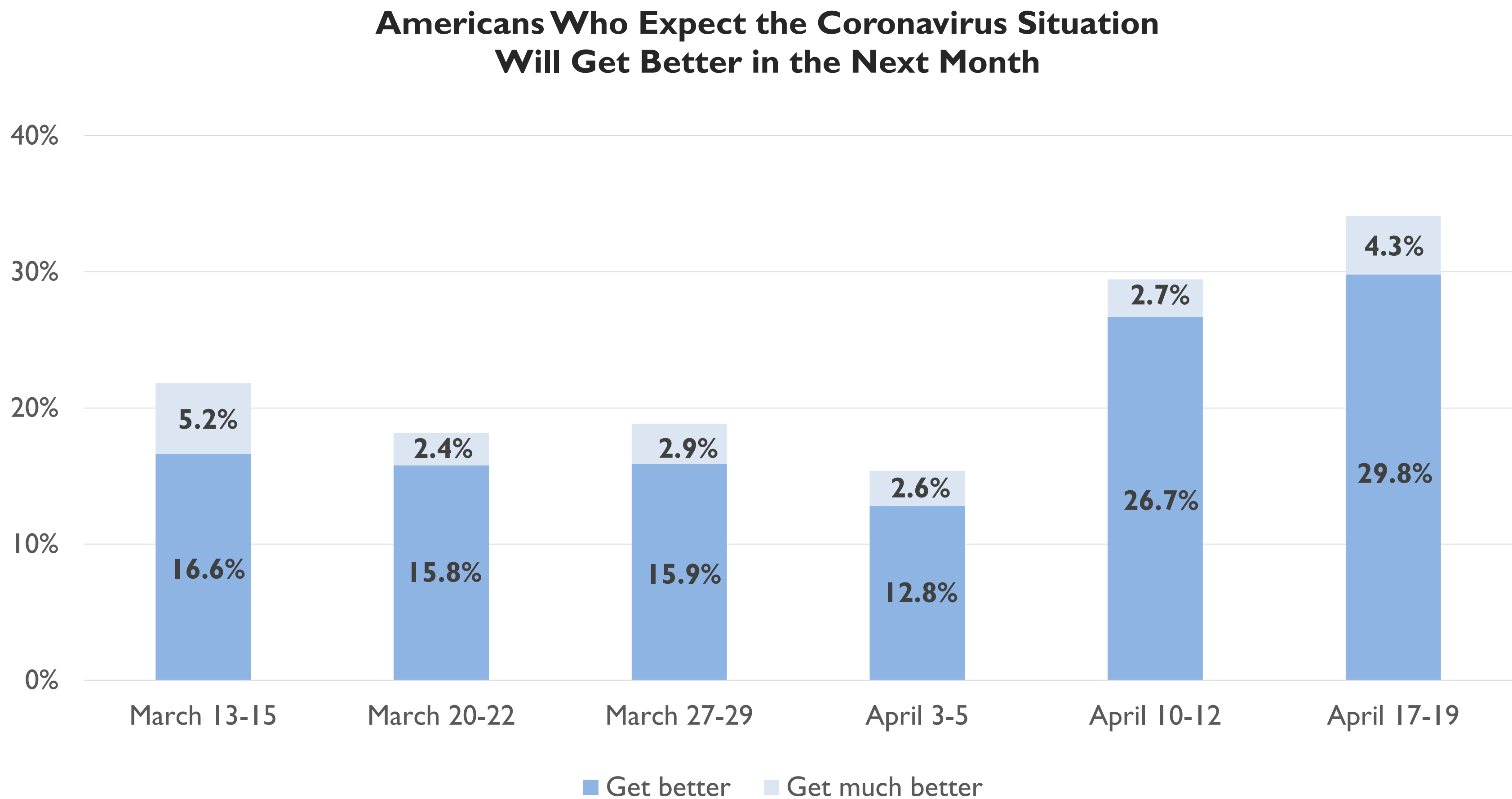
THANK YOU IN ADVANCE

Key Findings for the Week of April 20th

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Expectations for Coronavirus Outbreak

American travelers continue to feel better that the worst of COVID-19 may be on the horizon. Now 34.1% think the situation will improve in the U.S. in the next month, up from 29.5% last week.

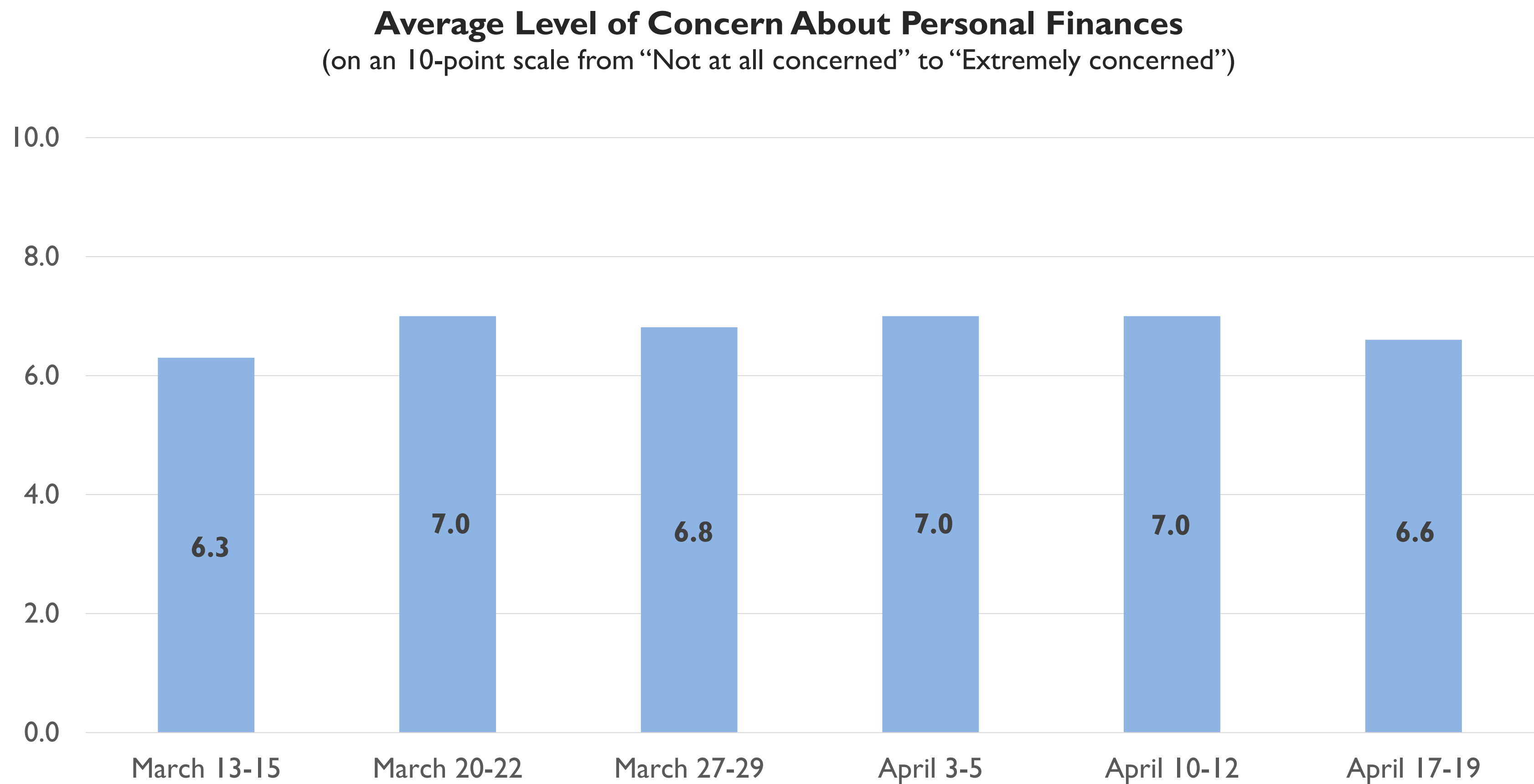


Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)
In the next month the coronavirus situation will _____

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 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

The impact Americans feel the pandemic will have on their personal finances is at a five-week low (6.6 on a 10-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)

(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

Additionally, the perceived safety of travel activities has improved this week relative to last week.

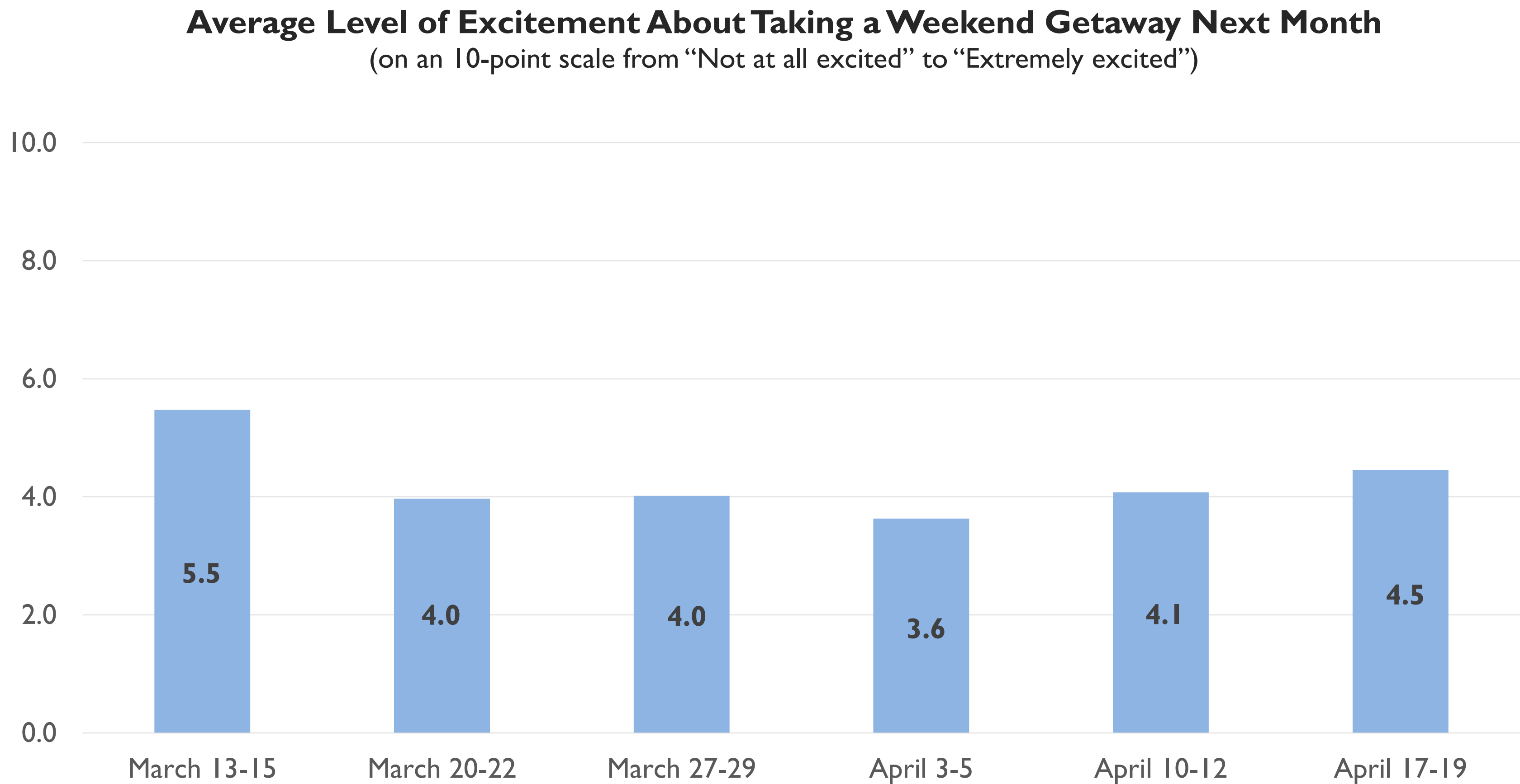


Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 5-6. 1,263 and 1,238 completed surveys. Data collected April 10-12 and 17-19, 2020)

Excitement About Taking a Weekend Getaway

Excitement levels towards taking a getaway in the next month remain low but are at a 5-week high (4.5/10.0).



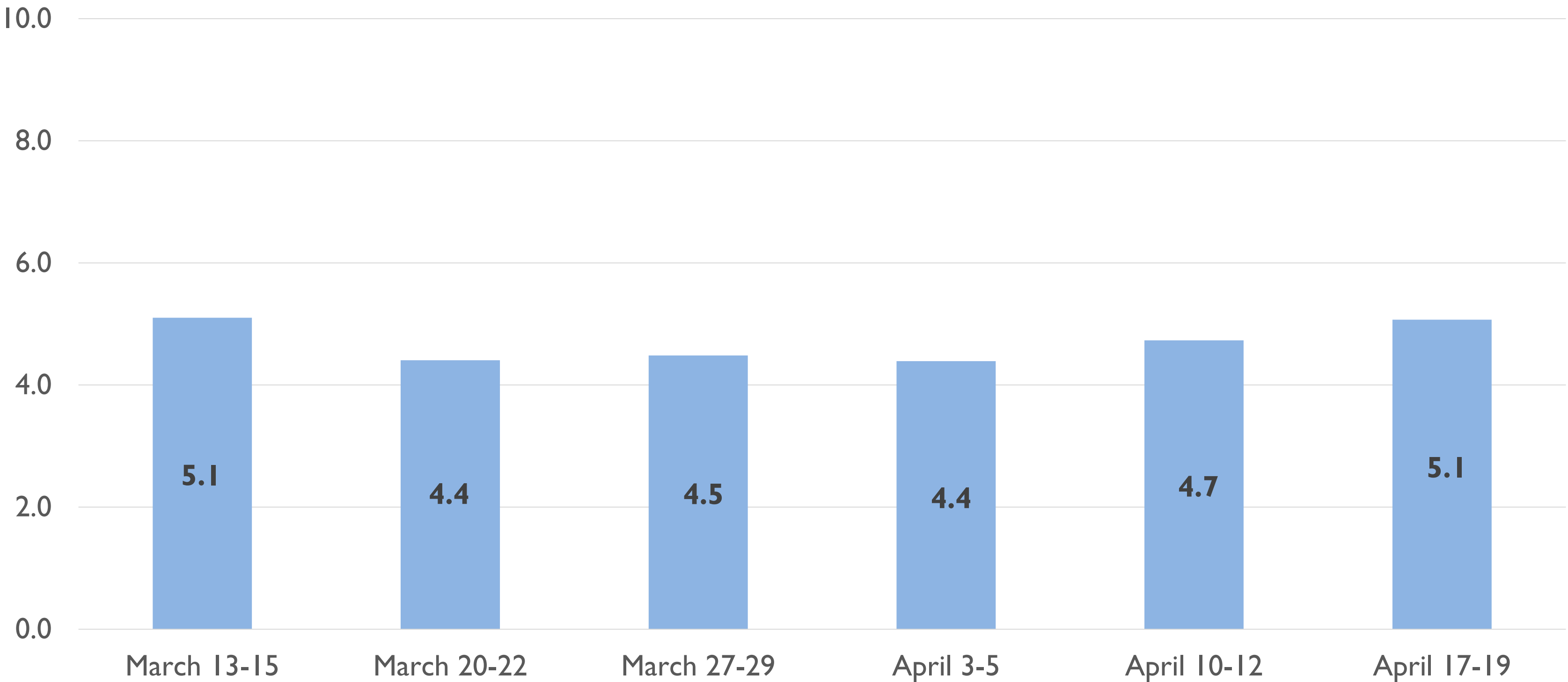
Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)

(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

Average Level of Excitement About Learning About New Travel Experiences
(on an 10-point scale from “Not at all excited” to “Extremely excited”)

Similarly, interest in learning about travel destinations remains low but is also at the highest its been since March 15th (5.1/10.0).

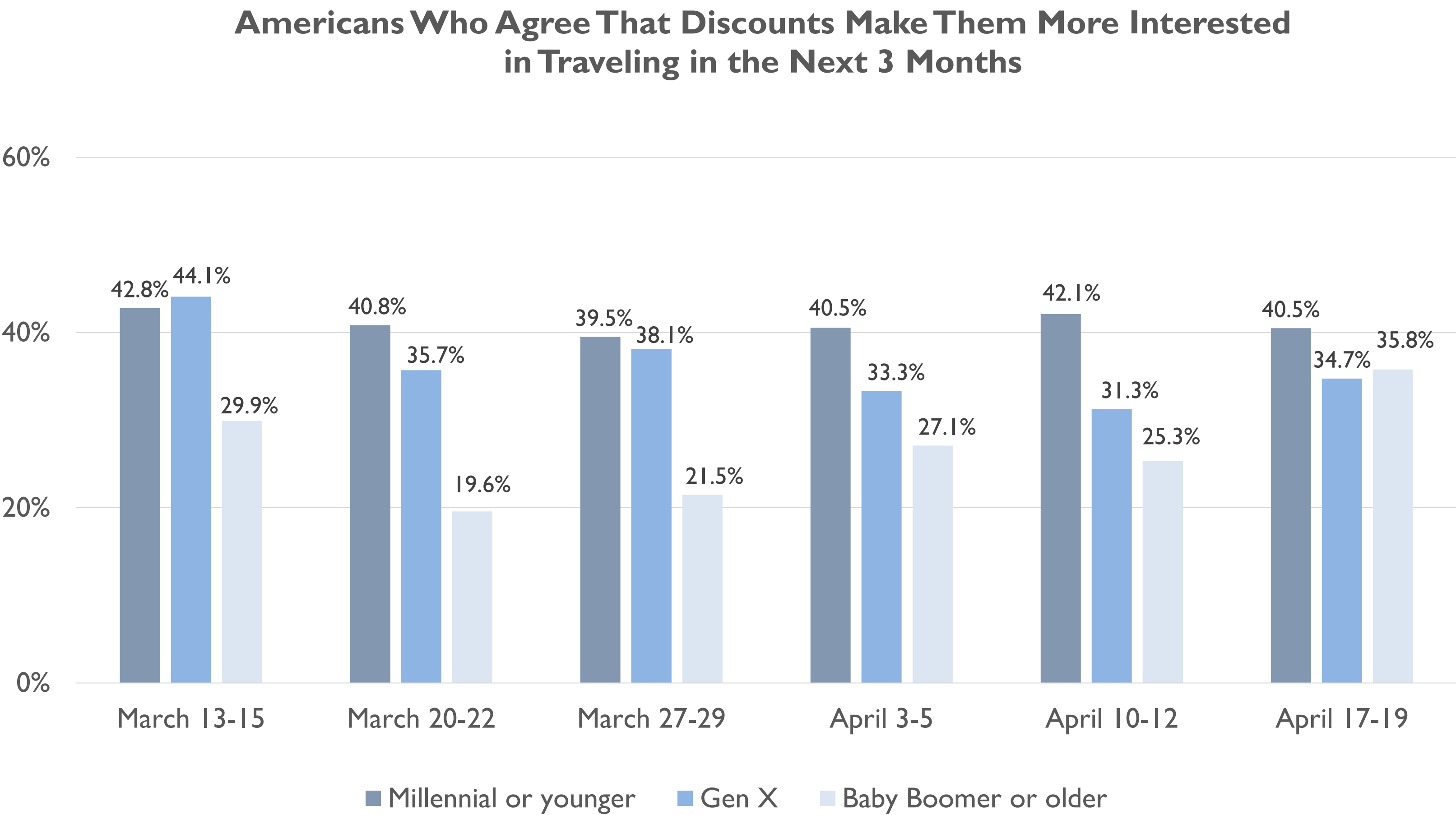


Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(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)

Discounts and Price Cuts

Boomers’ motivation to travel because of discounts and deals bounced back (up to 35.8% from 25.3% a week ago).



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

First Activities After Sheltering

When presented a list of leisure and personal activities and asked to select the first things they were going to do when shelter-in-place restrictions are lifted, 22.5% said taking a trip would be among their top 5. Taking a trip comes behind dining out and hangouts with friends, grooming services and shopping in a retail store, and beats going out on a date or to the gym.

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

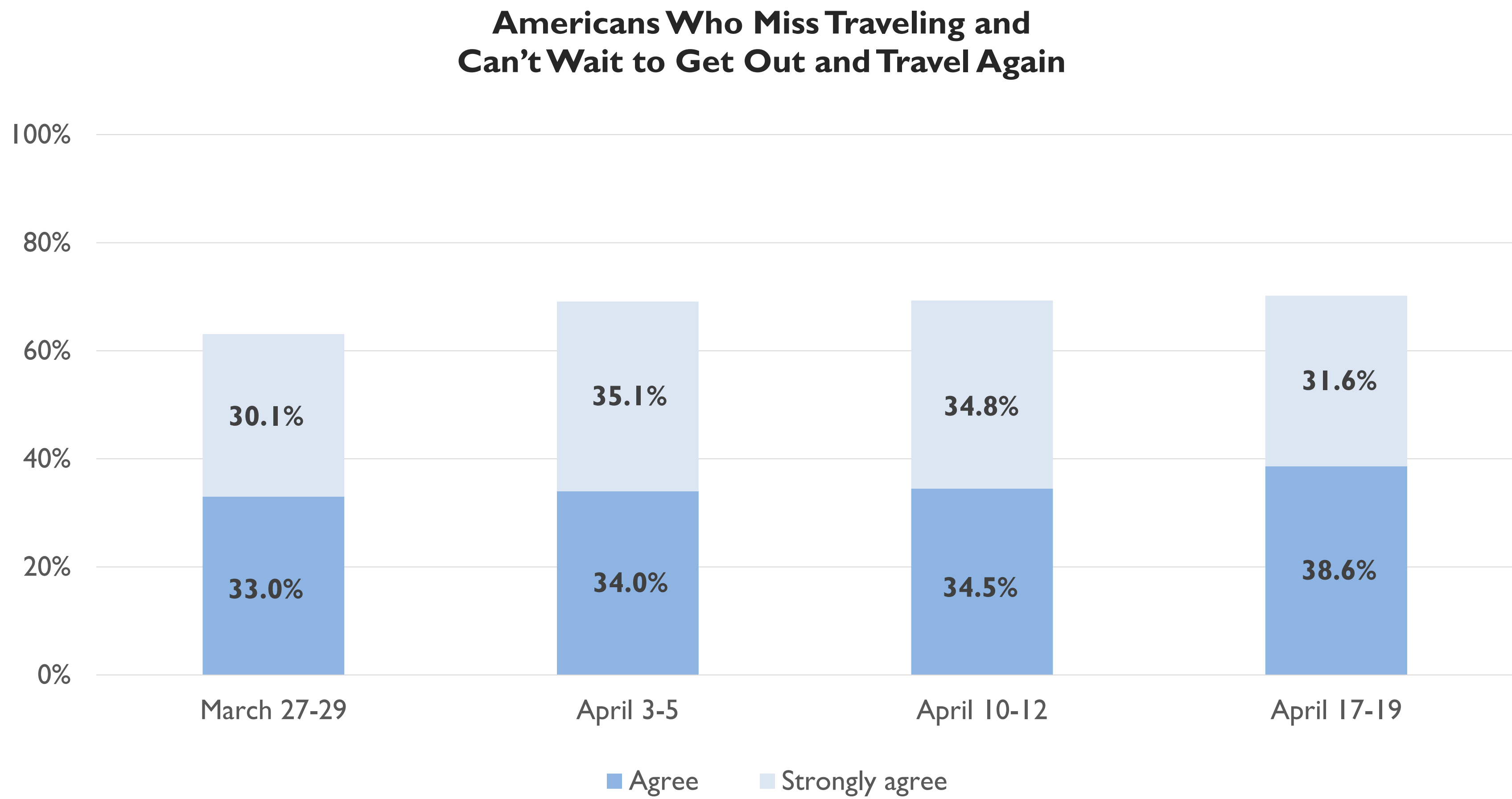
(Base: Wave 6. 1,238 completed surveys. Data collected April 17-19, 2020)

What are the first things you are going to do when shelter-in-place restrictions are lifted?



Excitement to Get Back to Travel

A majority of American travelers, 70.2%, say they miss travel this week--with 38.6% strongly agreeing they do.

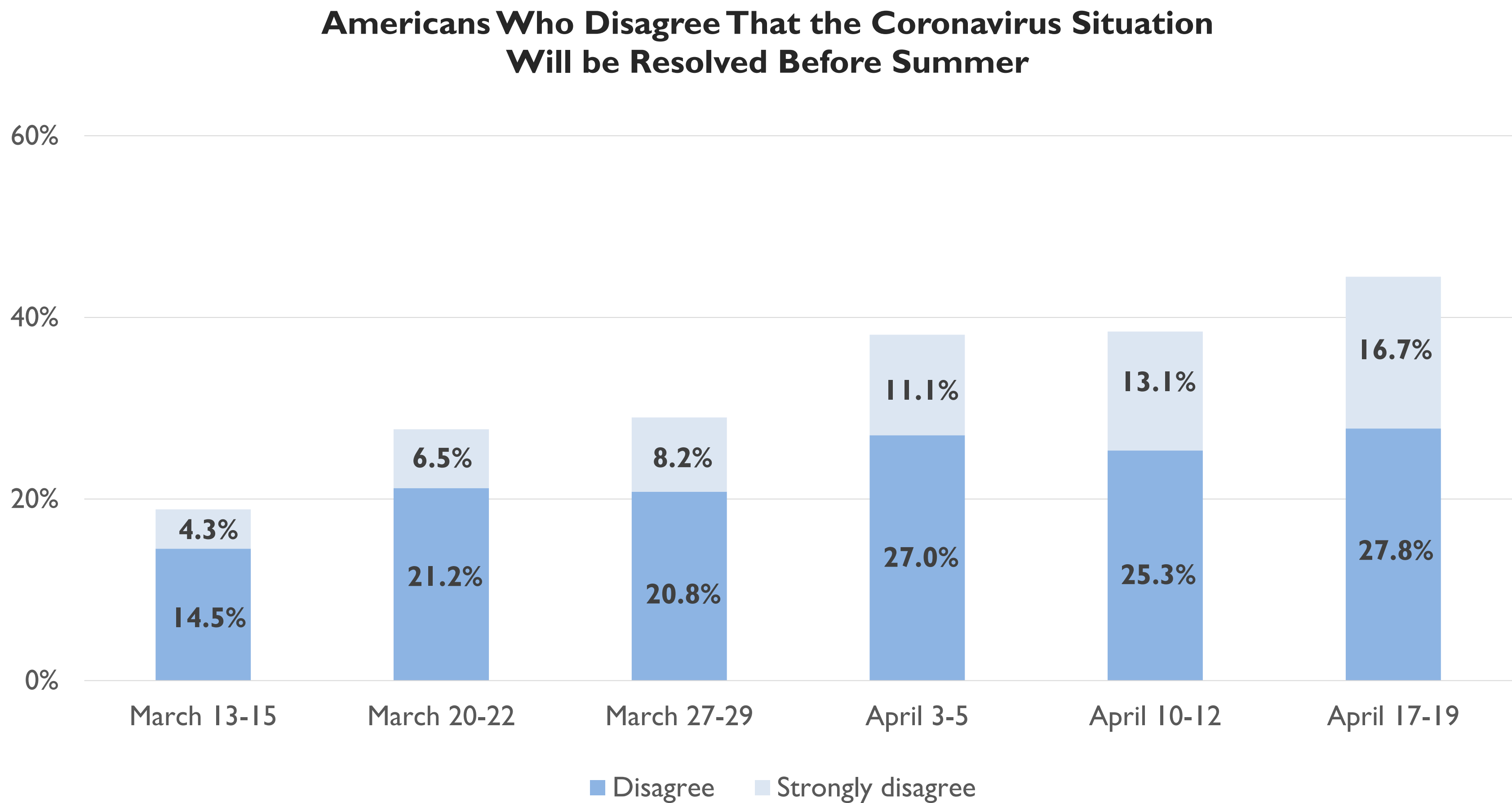


Question: How much do you agree with the following statement?
Statement: I miss traveling. I can't wait to get out and travel again.

(Base: Waves 3-6. 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 27-29, April 3-5, 10-12 and 17-19, 2020)

Expectations for Summer Travel Season

Regarding timing, American travelers increasingly don't believe or are unsure that the pandemic will be resolved by the summer travel season (44.5% disagree it will).

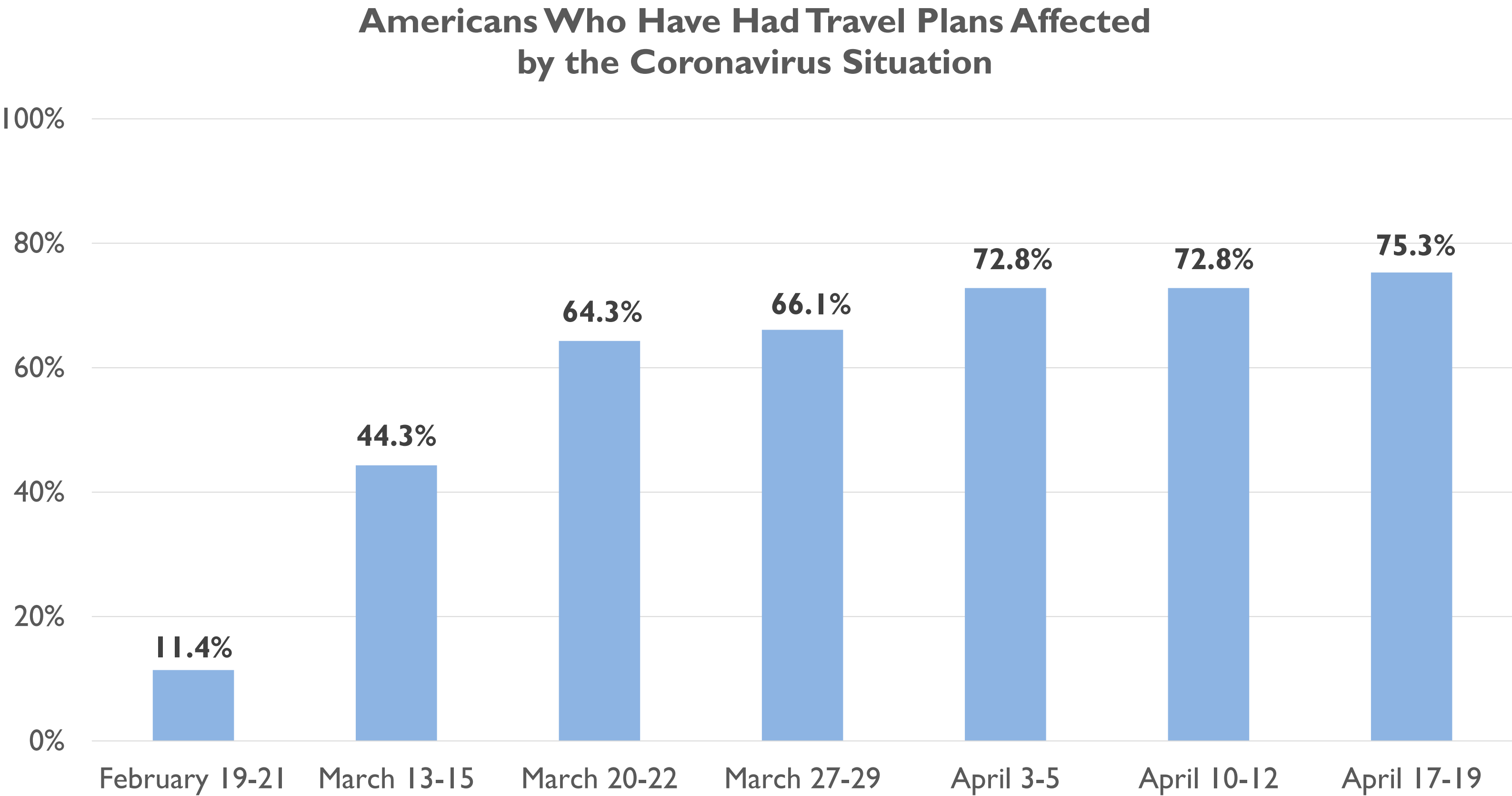


Question: How much do you agree with the following statement?
Statement: I expect the coronavirus situation will be resolved before the summer travel season.

(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)

Impact of the Coronavirus on Travel

Americans with travel impacted by coronavirus is up 75.3% from 72.8%.

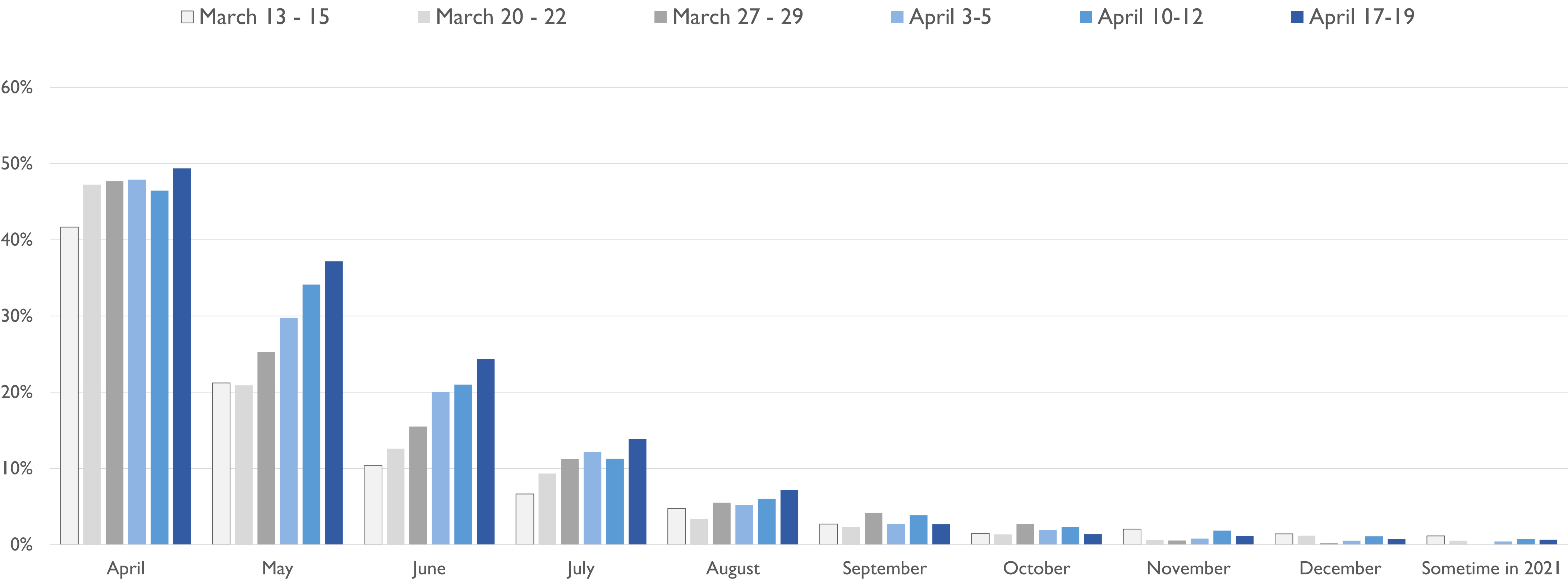


Question: Has the current coronavirus situation affected your travel in any way? (Please consider all your travel--leisure, business, group meeting, etc.)

(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)

Month of Trip Cancellation

The number reporting trip cancellations increased (70.3% from 66.9%), particularly in May and June.

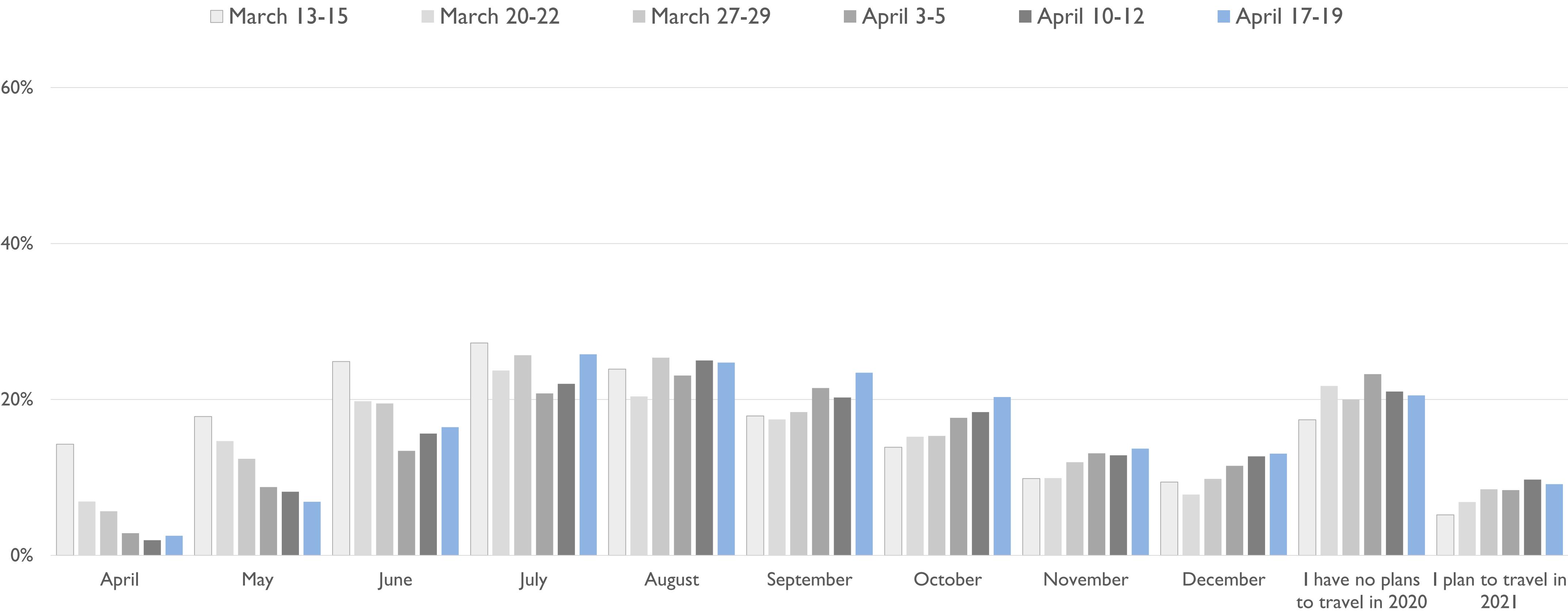


Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(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.)

Upcoming Travel Plans

Nevertheless, 51.2% continue to feel they will be traveling by Fall, with reported increases in travel plans for September and October.

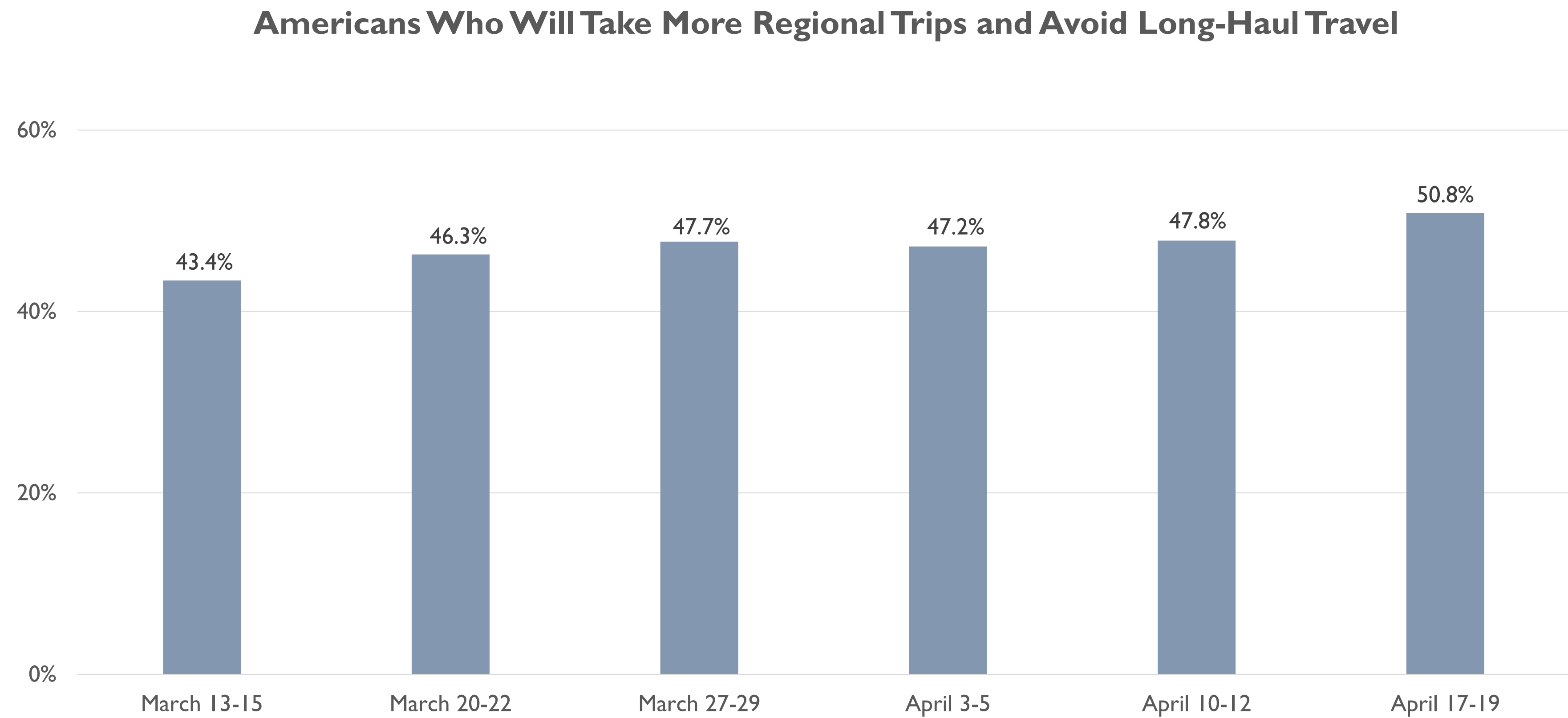


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

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

Regional Trips

There is a continued sign that travel is unlikely to quickly return to what it was pre-pandemic. The number of American travelers saying they will choose regional rather than long-haul destinations (50.8%) this year continues to grow and is at the highest recorded level since this study began.



Question: How much do you agree with the following statement?
Statement: Because of the Coronavirus, I'll probably be taking more regional trips and avoid long-haul 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)

Most Desired Activities on First Post-Pandemic Trip

Americans appear to strongly want to get to a beach on their first trip post-pandemic.



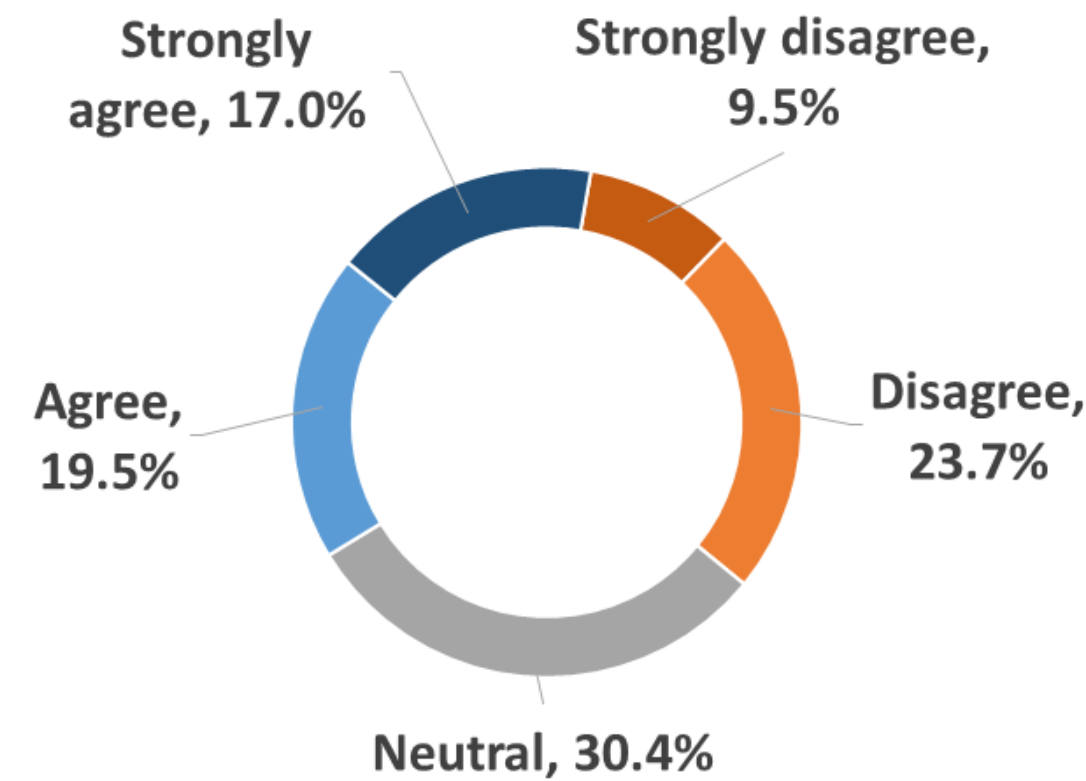
Question: Imagine it is some time later when you first begin feeling it is safe to travel again for leisure. On your first trip what activities do you most want to do? (OPEN_ENDED QUESTION)

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

Traveling Until There is a Vaccine

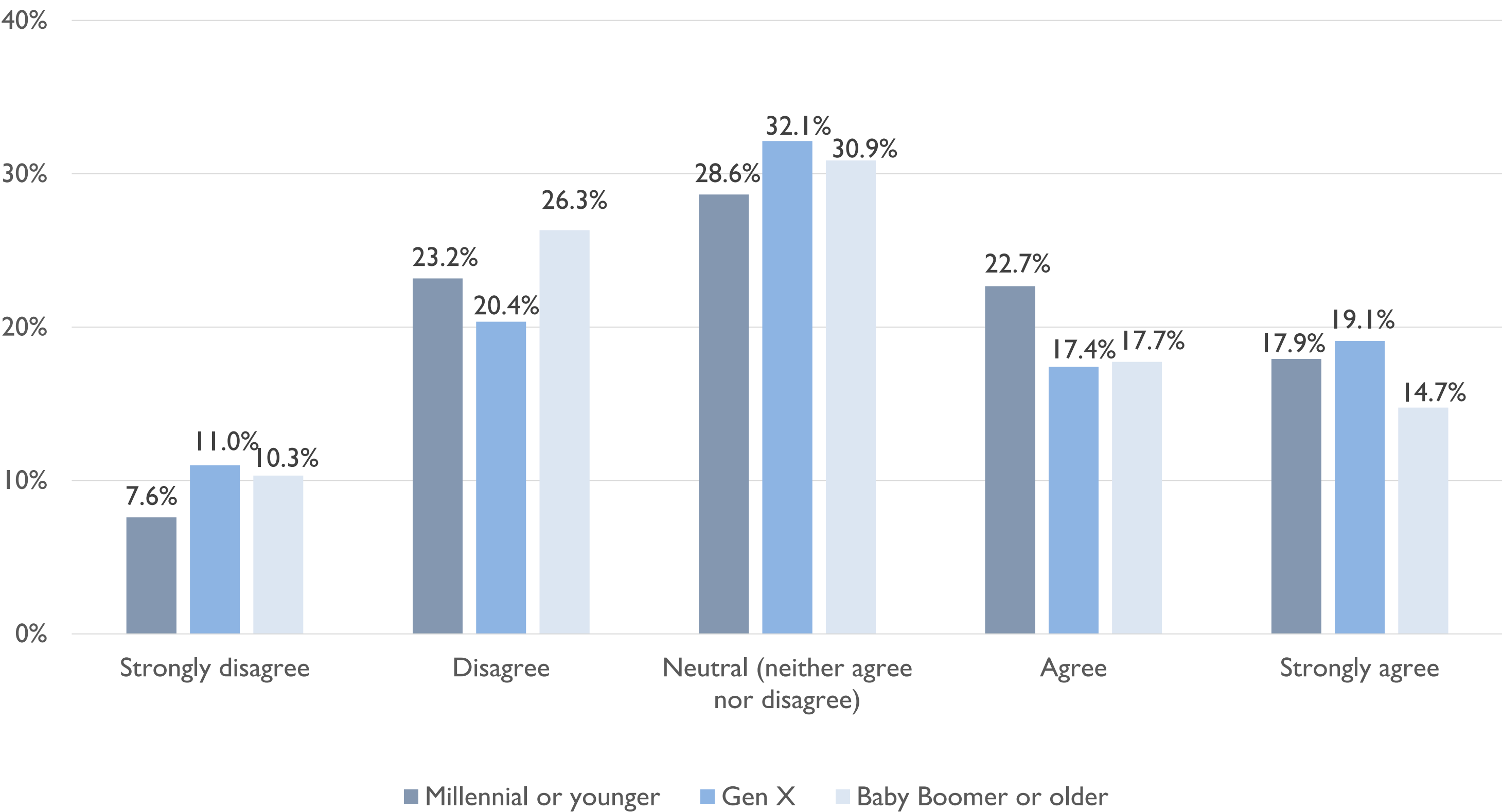
36.5% of American travelers say they agree to some degree with the statement “I’m not traveling until there is a (COVID-19) vaccine”; 43.2% disagree. Younger travelers were actually the most likely to agree they may not travel until there is a vaccine.

“I’m not traveling until there is a vaccine.”



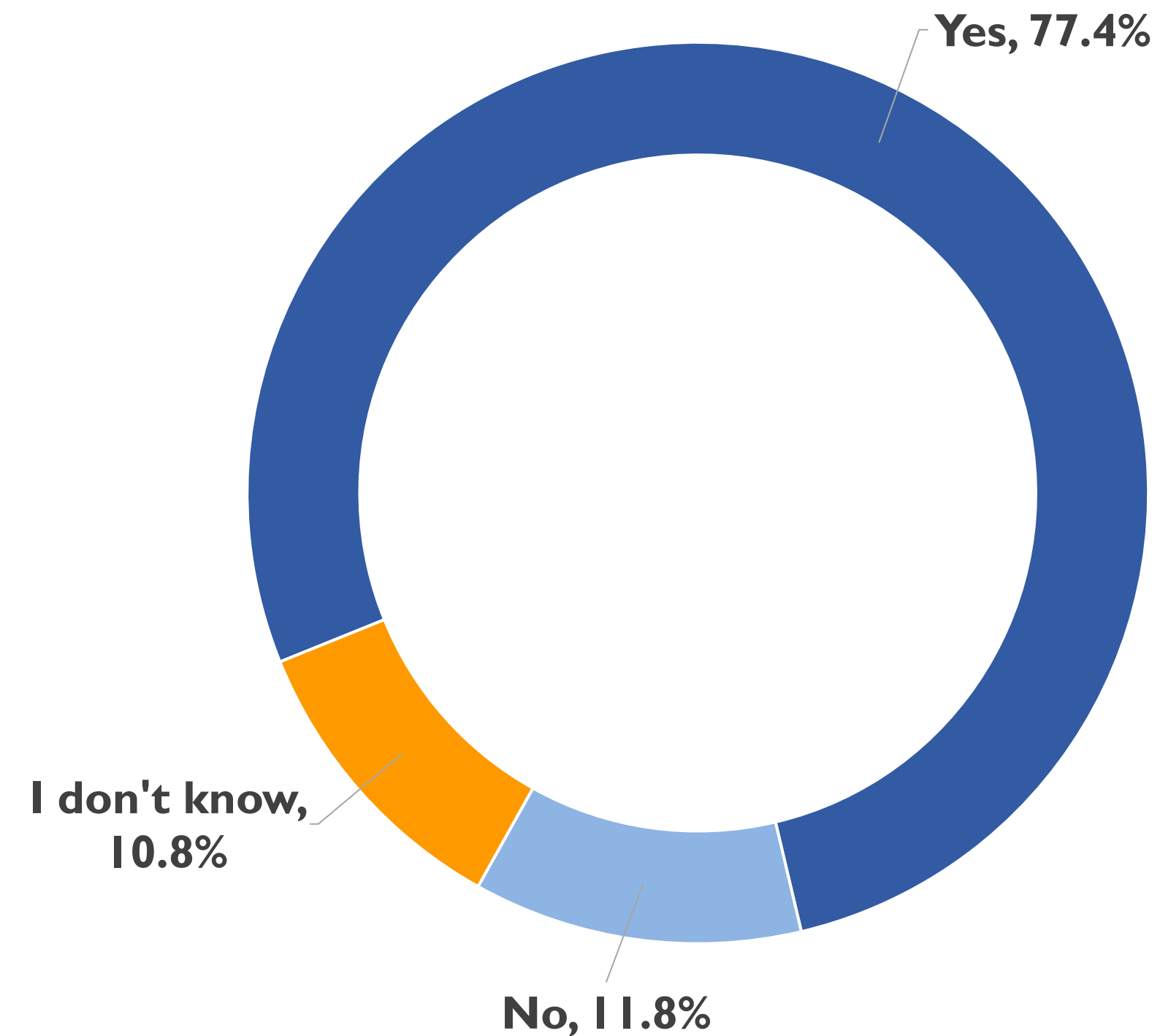
Question: How much do you agree with the following statement?
Statement: I'm not traveling until there is a vaccine.

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



Airport Health Screenings

77.4% of American travelers say they would approve of mandatory health screenings for flights between destinations inside the continental United States.

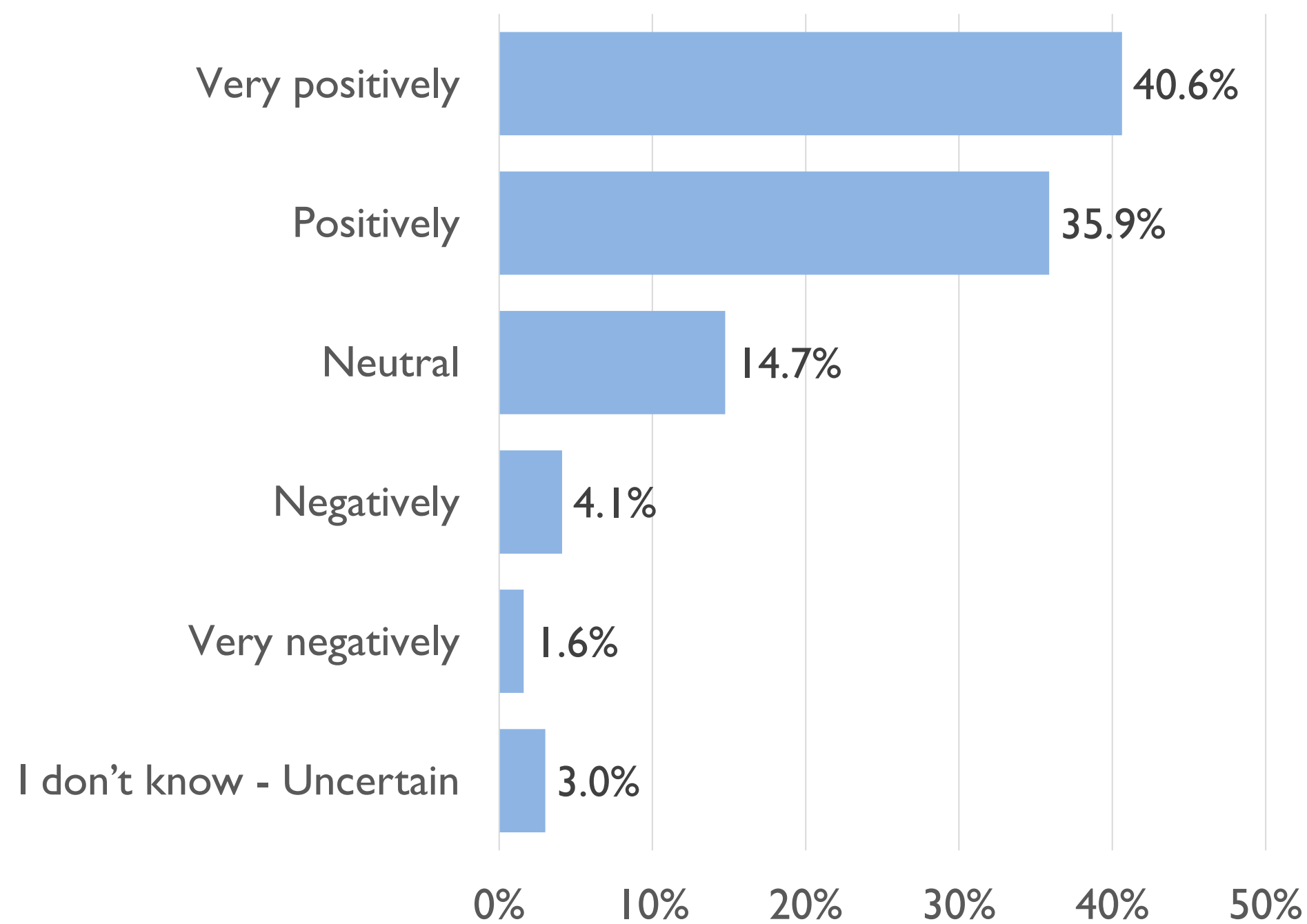


Question: Would you approve of mandatory health screenings for flights between destinations inside the continental United States?

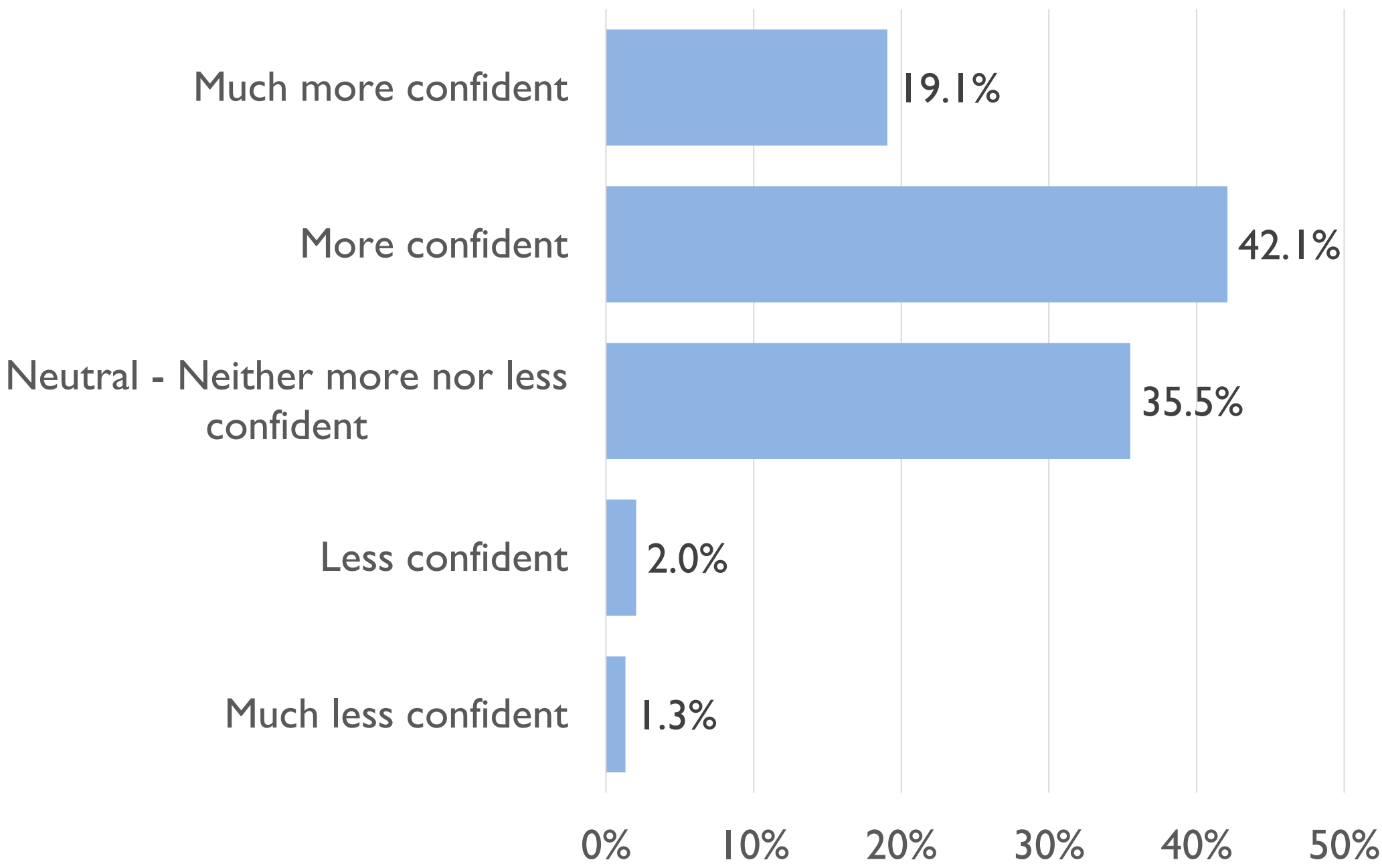
(Base: Wave 6. 1,238 completed surveys. Data collected April 17-19, 2020)

Opinions on Airport Health Screenings

76.5% feel positively about the notion of mandatory health screenings at airports and 61.2% say such measures will increase their confidence traveling to a destination.



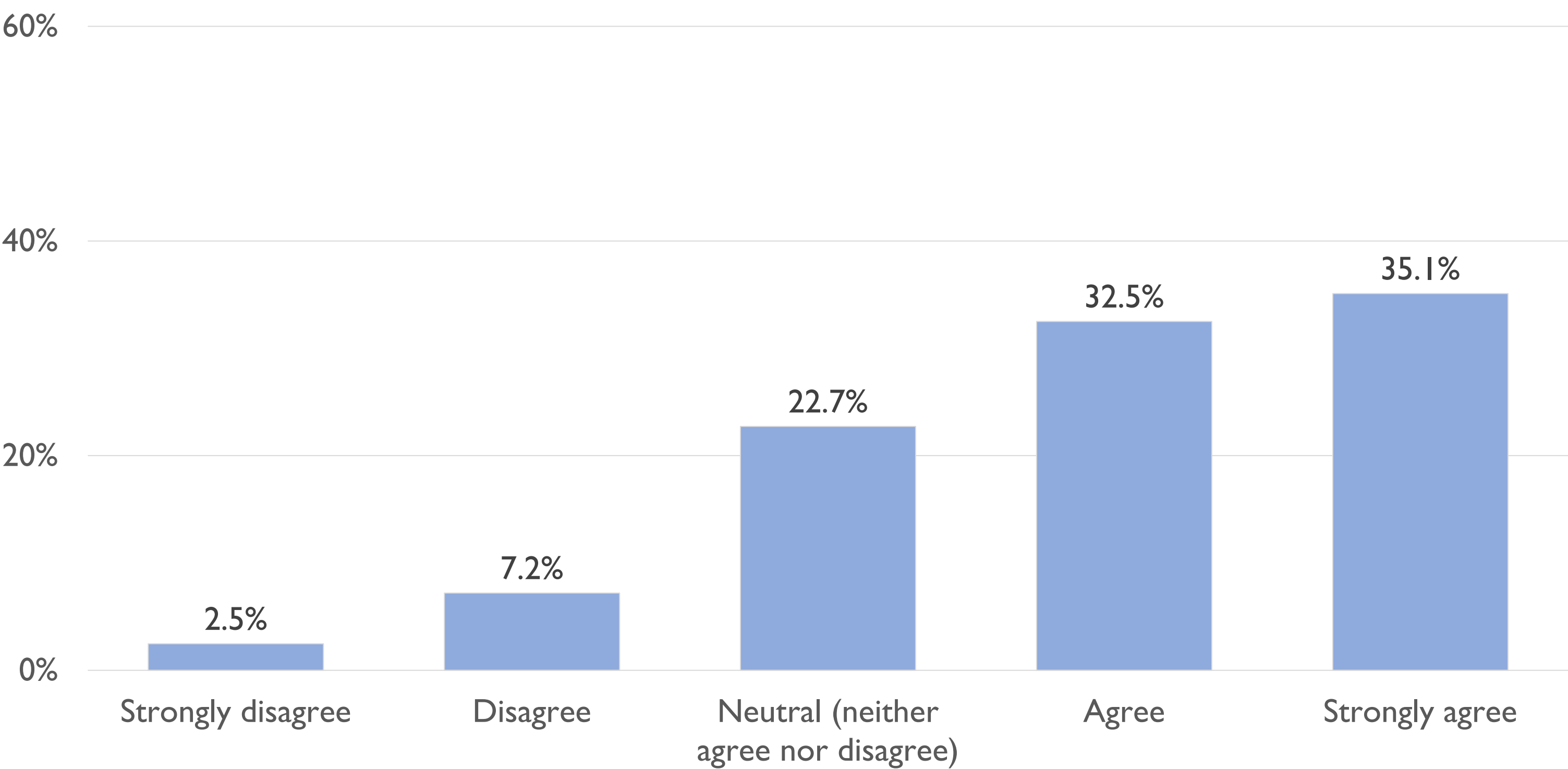
Question: In general, how do you feel about mandatory health screenings at airports?
*(Base: Wave 6. All respondents, 1,238 completed surveys.
Data collected April 17-19, 2020)*



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

Travelers in Community

The present moment is not the time to travel in the U.S., according to the majority of American travelers. Over two-thirds say they do not want other travelers coming to their community right now.



Question: 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)



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