

DESTINATION ANALYSTS'
CORONAVIRUS
TRAVEL SENTIMENT
INDEX REPORT

KEY FINDINGS—WEEK OF MAY 4TH, 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



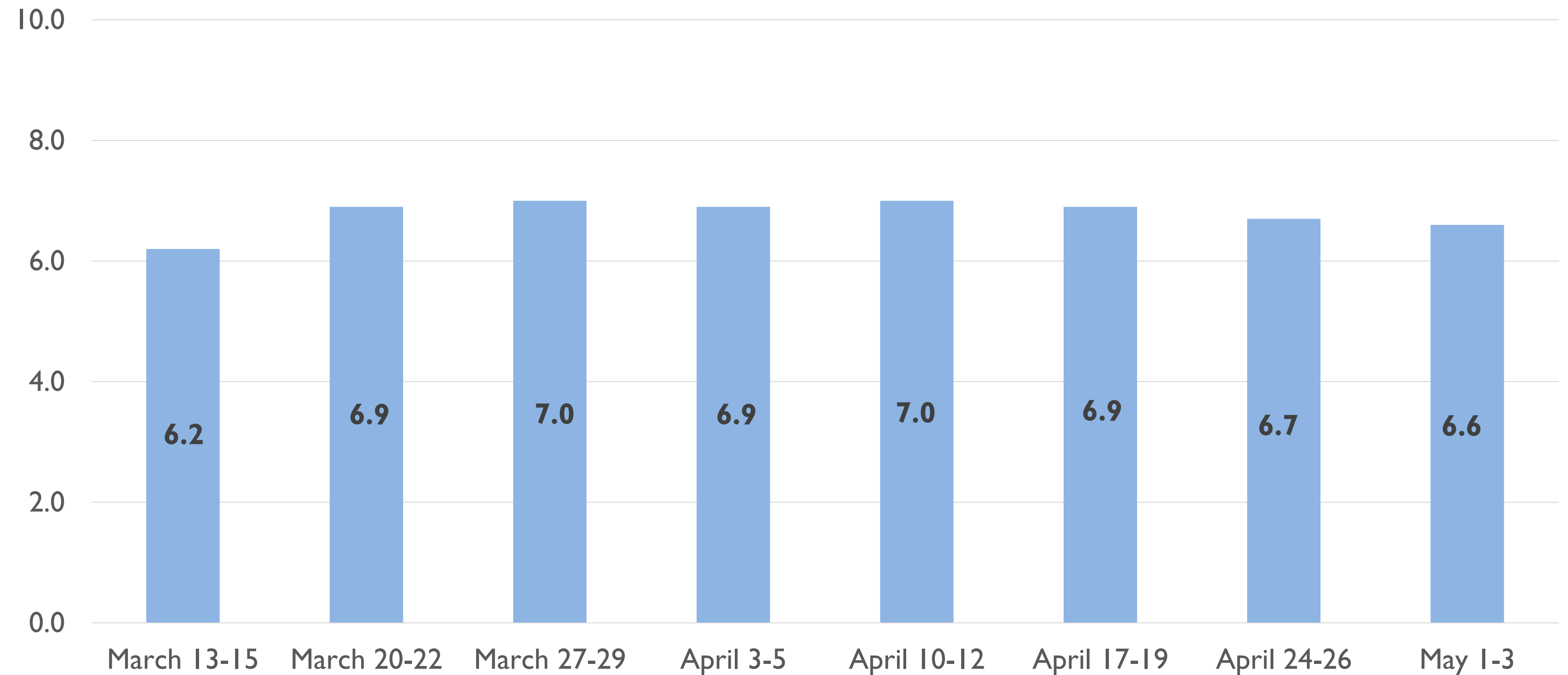
Key Findings for the Week of May 4th

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Personal Health Concerns

Average Level of Concern About Personally Contracting Coronavirus
(on an 10-point scale from “Not at all concerned” to “Extremely concerned”)

**Concern about personally
(6.6/10) contracting the
virus is at the lowest level it
has been since March 15th.**



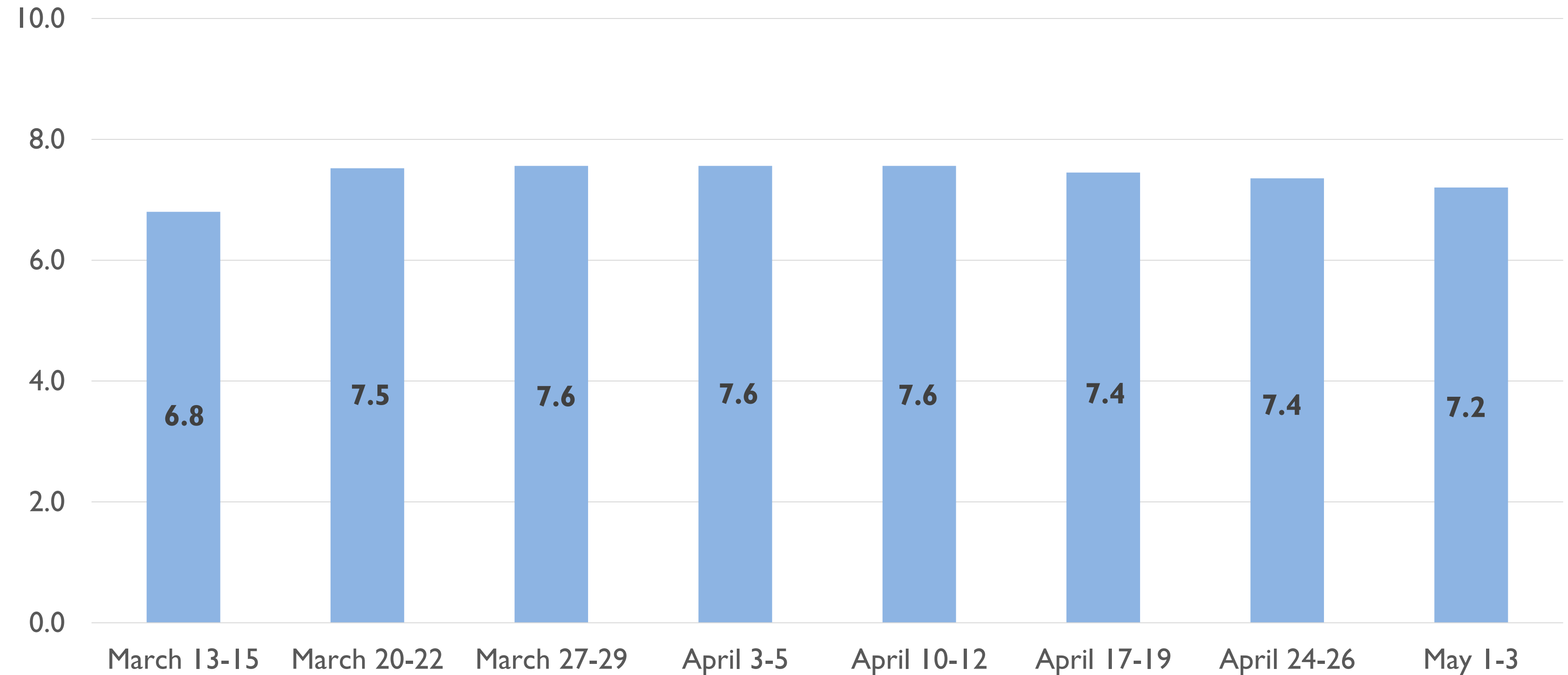
Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

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

Health Concerns About Family & Friends

Average Level of Concern About Family & Friends Contracting Coronavirus
(on an 10-point scale from “Not at all concerned” to “Extremely concerned”)

Similarly, concern about friends & family (7.2/10) contracting the virus is at a 7-week low.



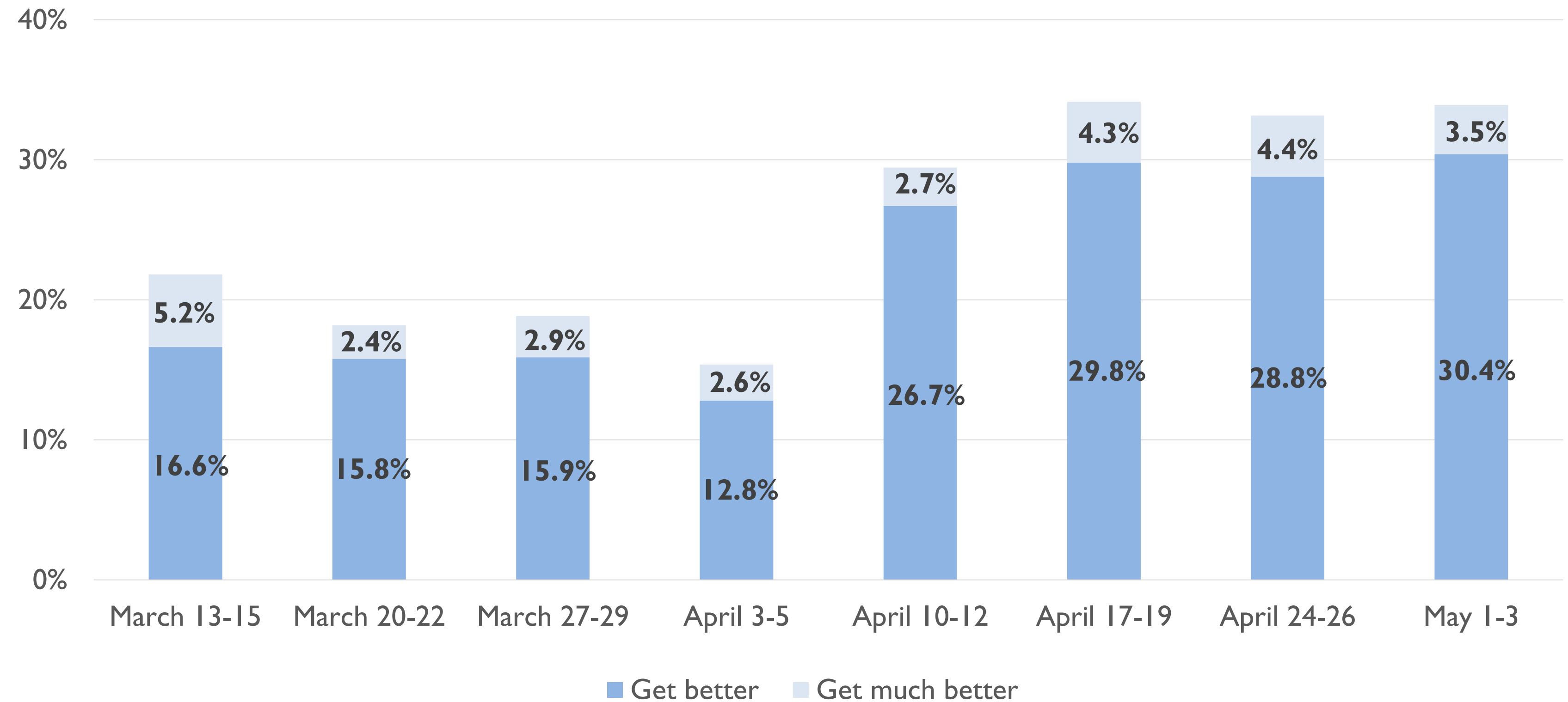
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

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

Expectations for Coronavirus Outbreak

Now, 33.9% of American travelers feels the coronavirus situation in the US will get better in the next month.

Americans Who Expect the Coronavirus Situation Will Get Better in the Next Month



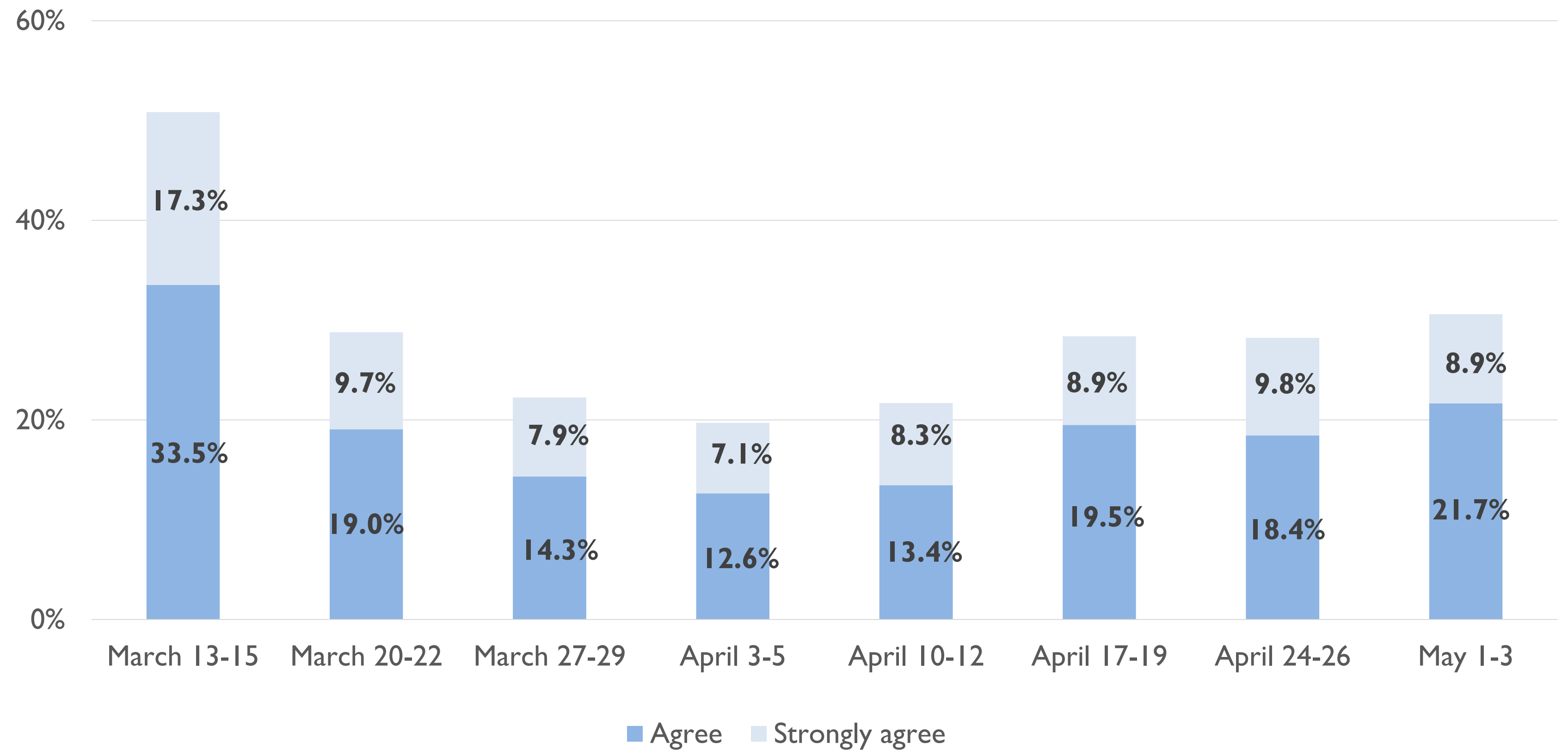
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)
In the next month the coronavirus situation will _____

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

Comfort Enjoying Home Community

Americans Who Feel Comfortable Enjoying their Community

Comfort going out in their own communities to undertake local activities is slowly returning—30.6% now feel comfortable from a low of 19.7% April 5th.



Question: How much do you agree with the following statement?

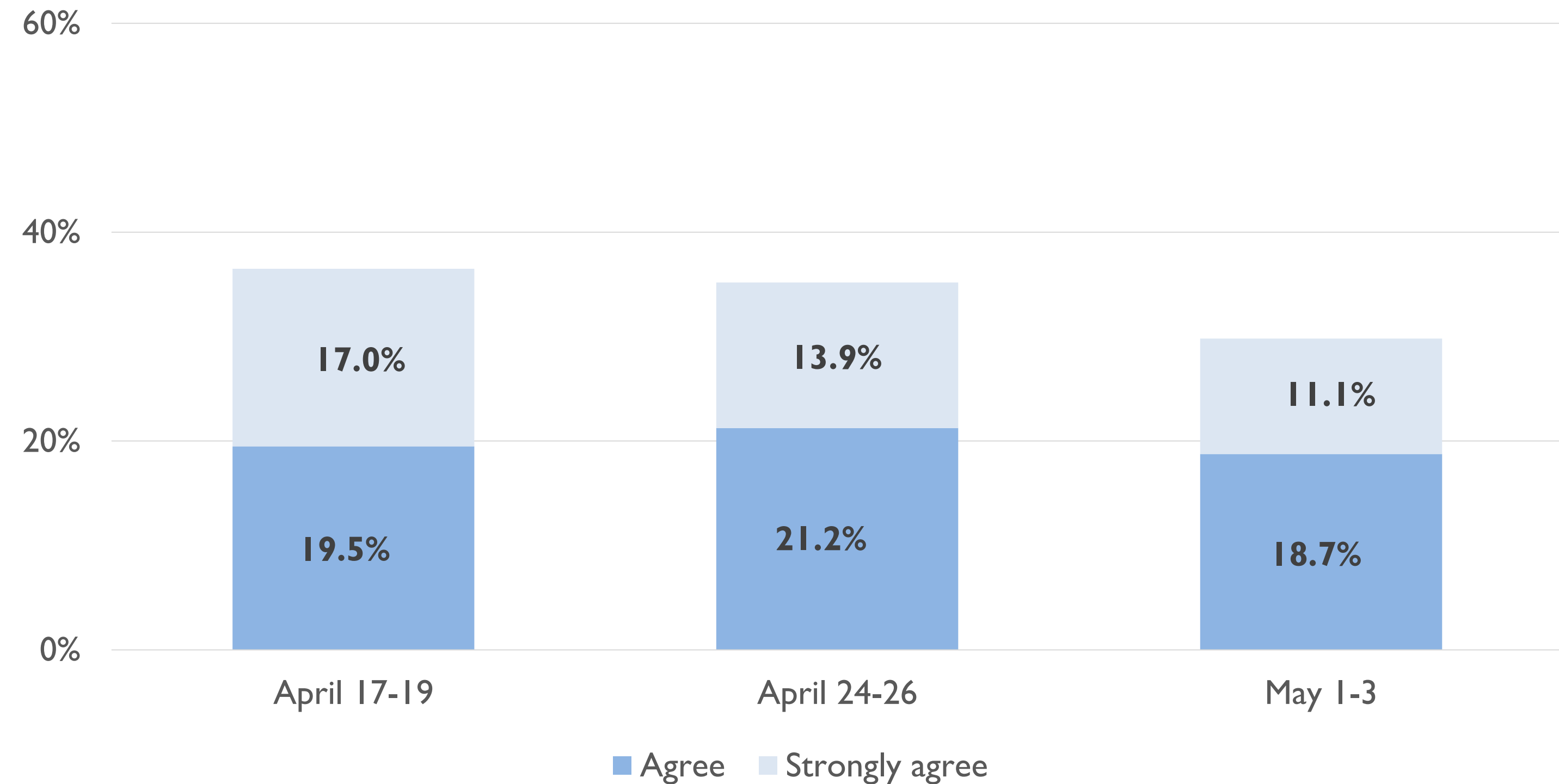
Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

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

Won't Travel Without Vaccine

The percent agreeing they won't travel until there is a vaccine continues to decline (29.8% down from 36.5% April 19th).

Americans Who Won't Travel Until There is a Vaccine



Question: How much do you agree with the following statement?

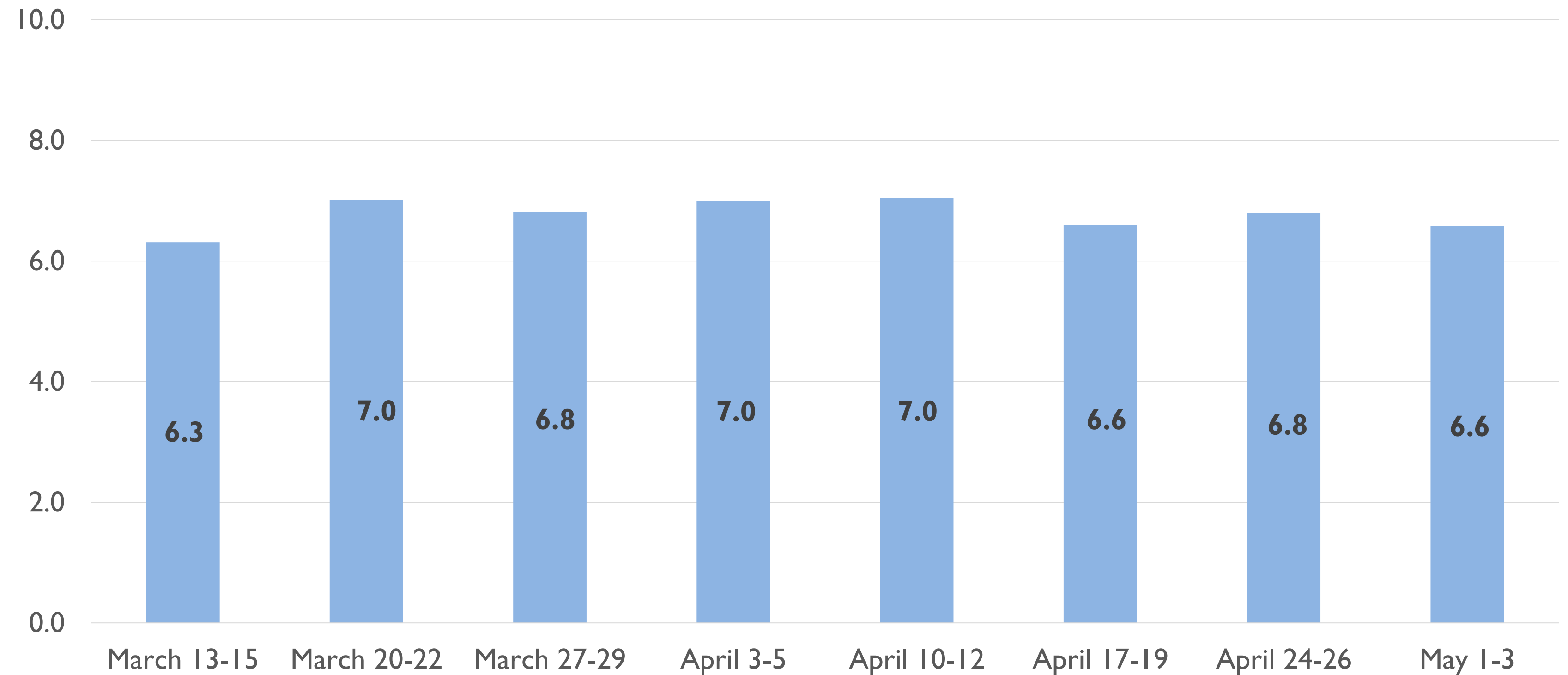
Statement: I'm not traveling until there is a vaccine.

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

Concerns About Personal Finances

Concern about the personal financial impact of the coronavirus is at a lower level (6.6/10) relative to previous weeks.

Average Level of Concern About Personal Finances
(on an 10-point scale from “Not at all concerned” to “Extremely concerned”)



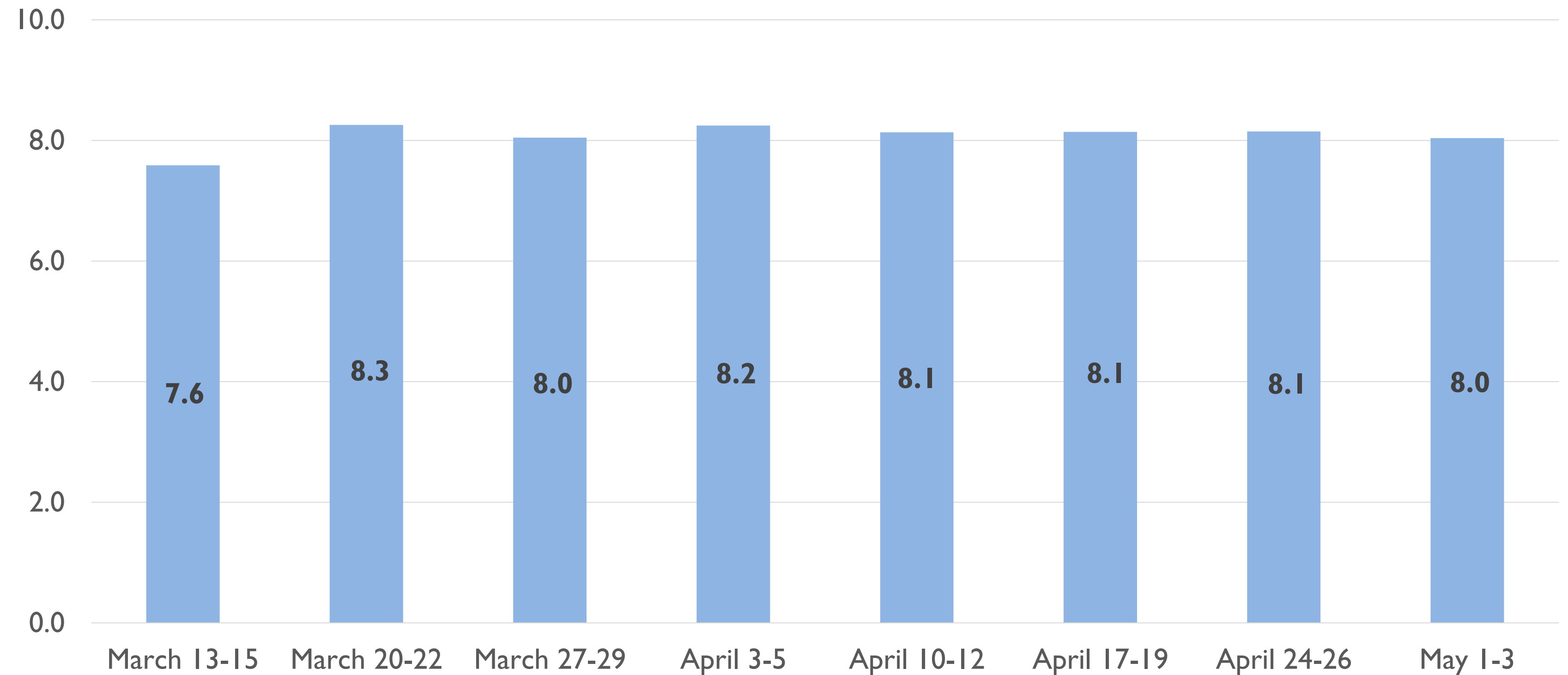
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?
(Please answer using the scale below)

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

Concerns About National Economy

However, concerns for the national economy remain high (8.0/10).

Average Level of Concern About National Economy
(on an 10-point scale from “Not at all concerned” to “Extremely concerned”)



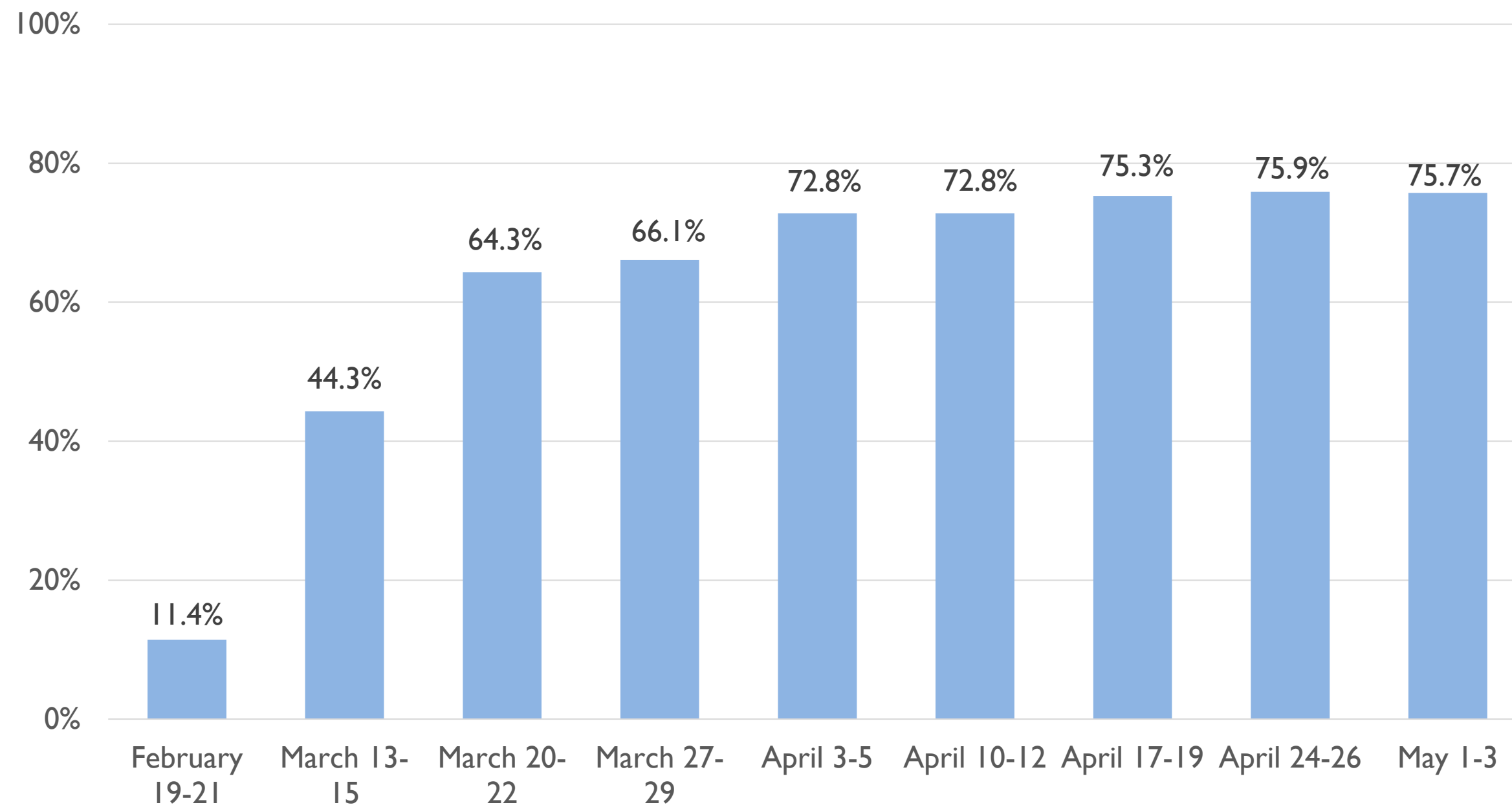
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?
(Please answer using the scale below)

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

Impact of the Coronavirus on Travel

In looking forward for travel, the coronavirus' impact on American travel remains at 75.7%, with 69.4% canceling a trip and 54.8% postponing.

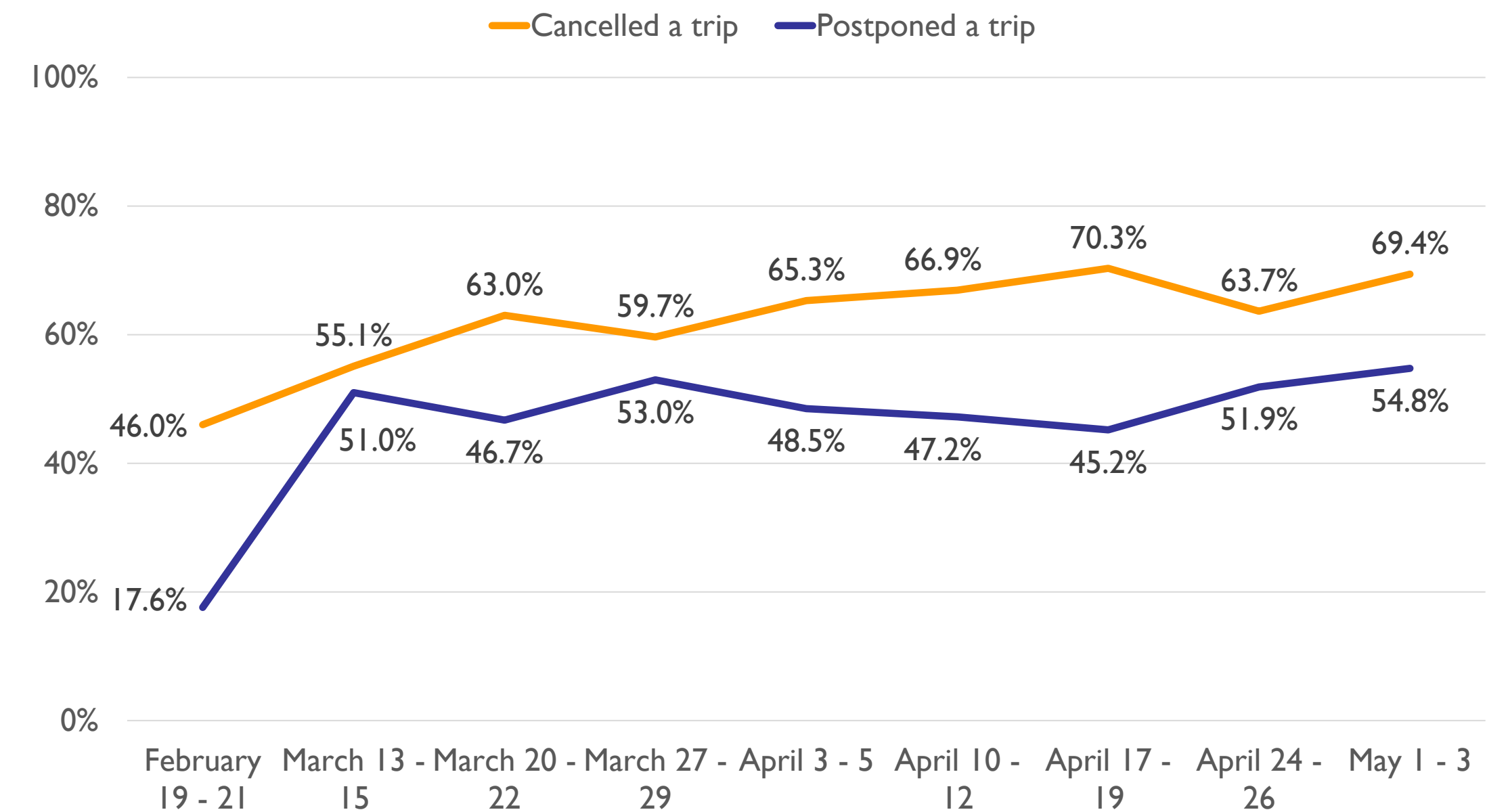
Americans Who Have Had Travel Plans Affected by the Coronavirus Situation



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, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26 and May 1-3, 2020)

How the Coronavirus has Impacted Travel

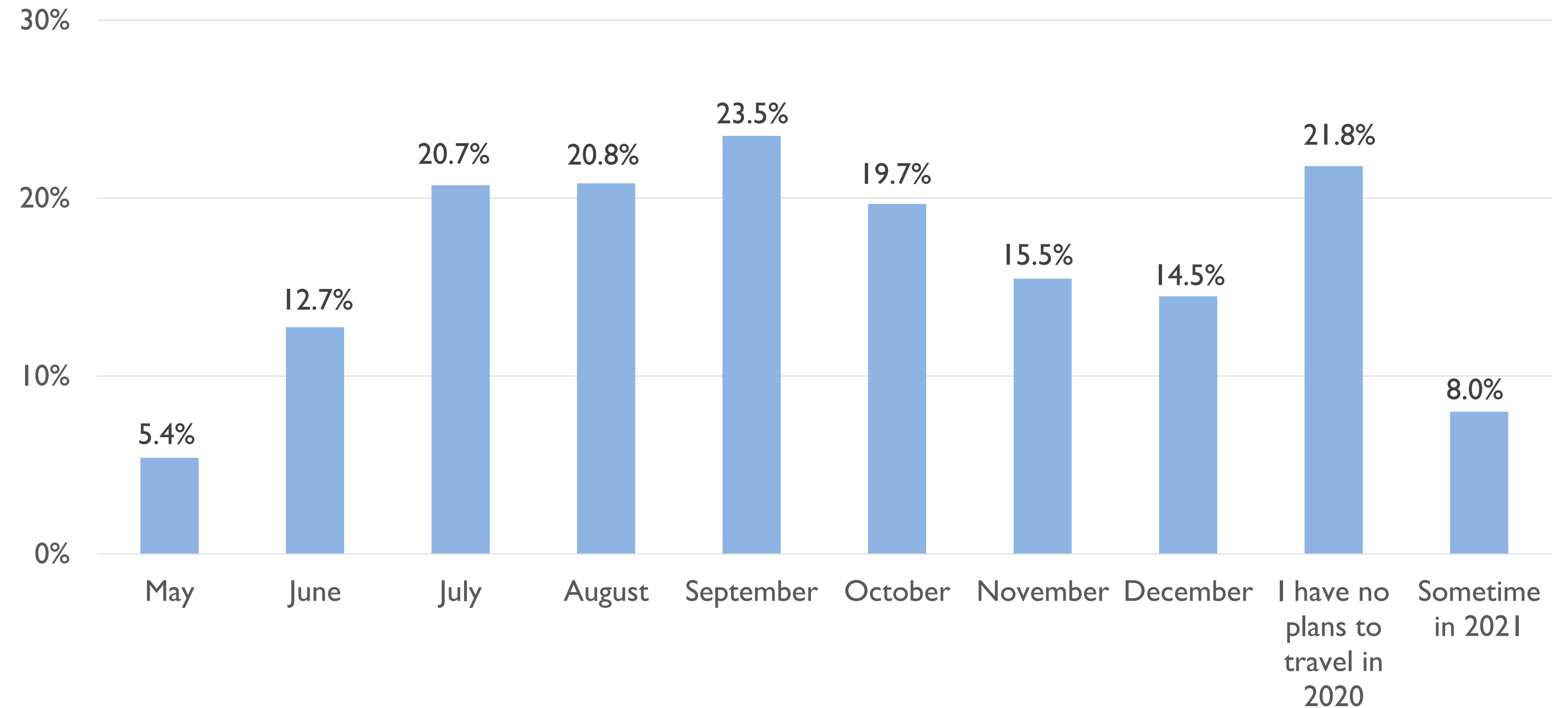


Question: How has the coronavirus situation affected your travel? (Select all that apply)
Due to the coronavirus situation, I have _____.

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

Months Americans Currently Have Plans to Take a Leisure Trip

Months Americans Currently Have Plans to Take a Leisure Trip
(as of May 3rd, 2020)



September now has the highest number of American travelers having at least tentative trip plans (23.5%), with increases reported in November (15.5%) and December (14.5%), as well.

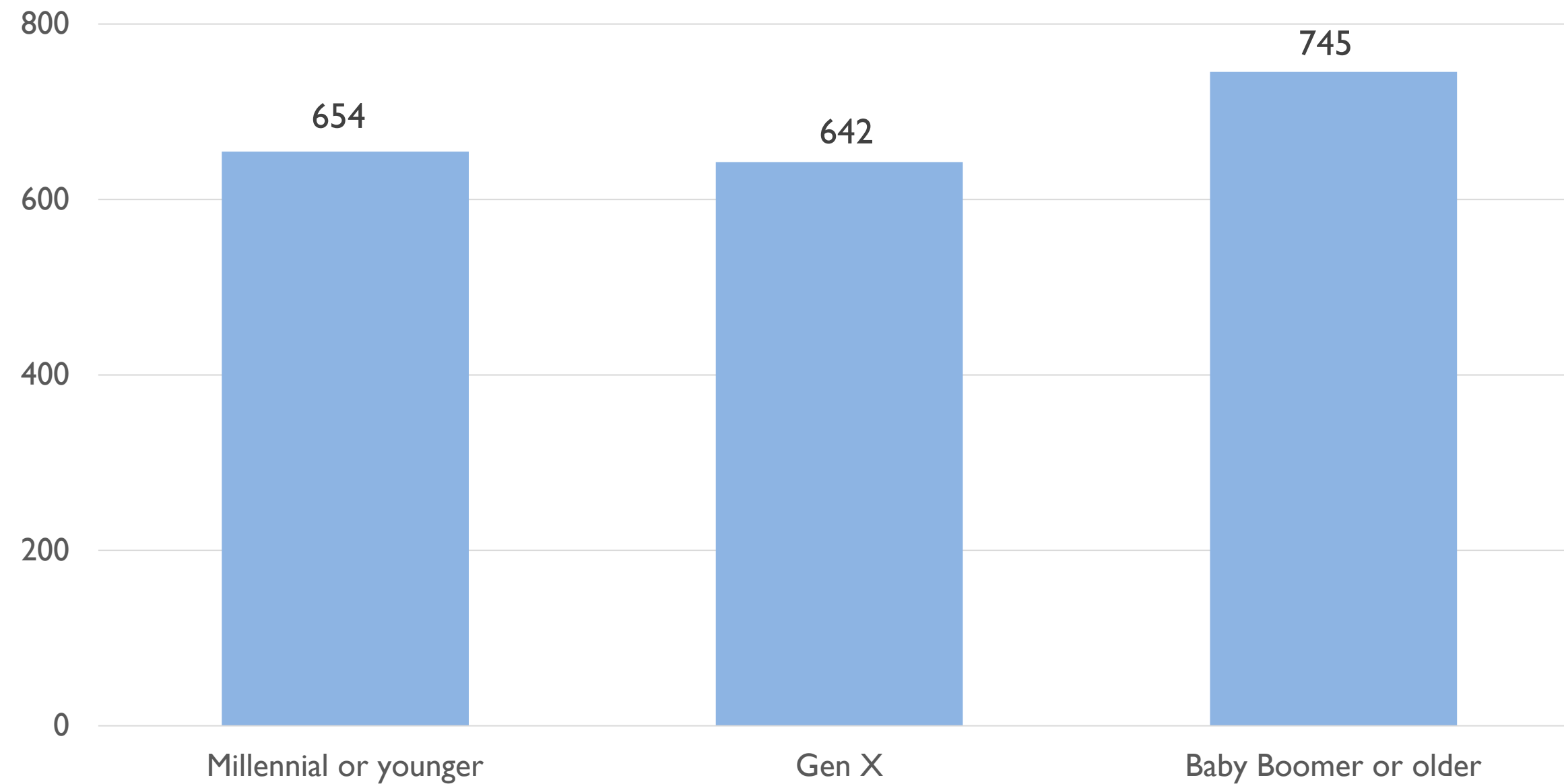
Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips? (Select all that apply)

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Distance of Next Leisure Trip

The average distance of American travelers' next leisure trip is 686 miles overall, with Baby Boomers and travelers in the West and South reporting trip averages over 700 miles, and affluent travelers reporting nearly 800 miles.

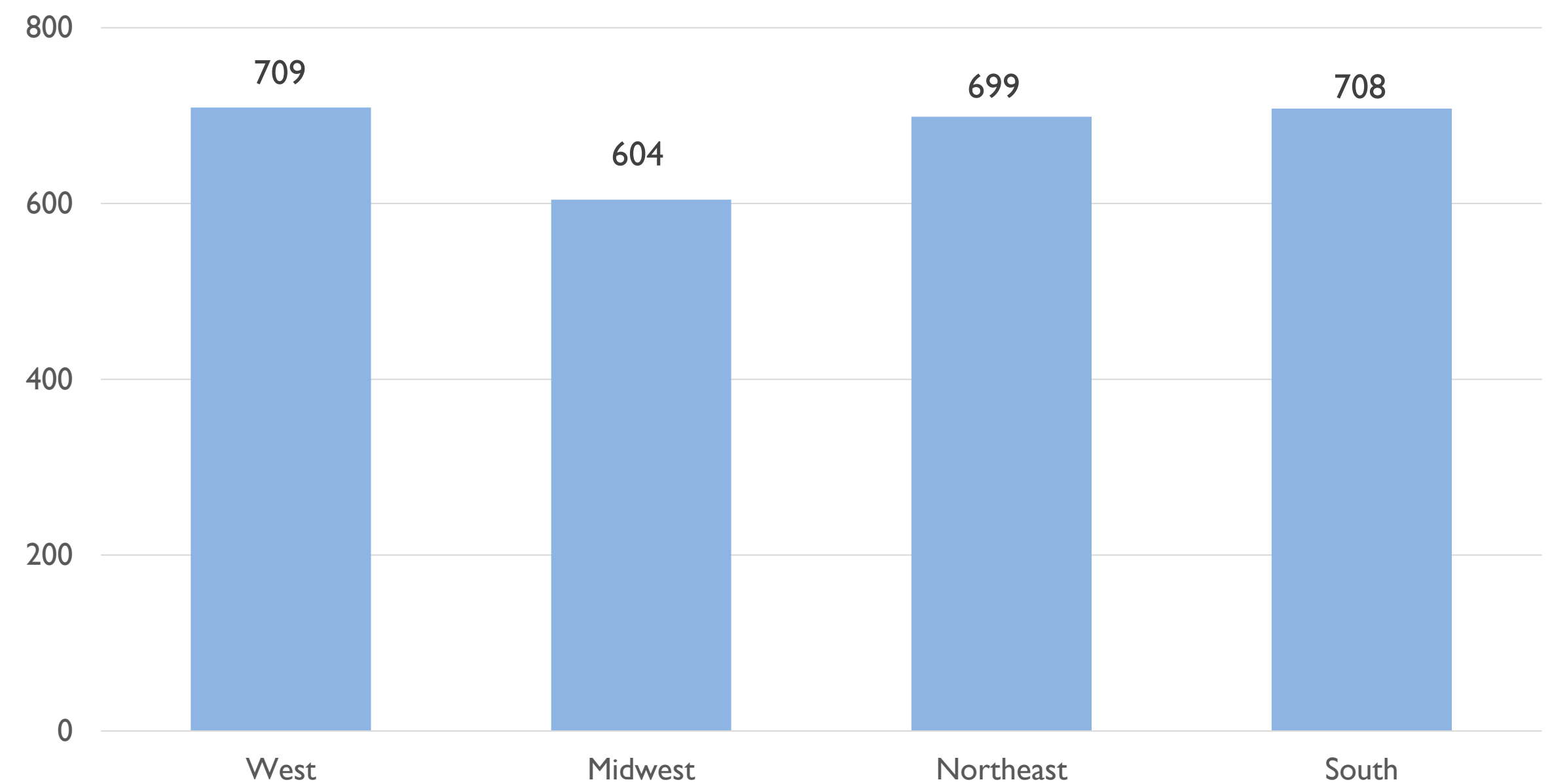
Average Distance of Next Leisure Trip—by Generation



Question: On your next leisure trip, how far away from home will be likely you travel?

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Average Distance of Next Leisure Trip—by U.S. Region



Question: On your next leisure trip, how far away from home will be likely you travel?

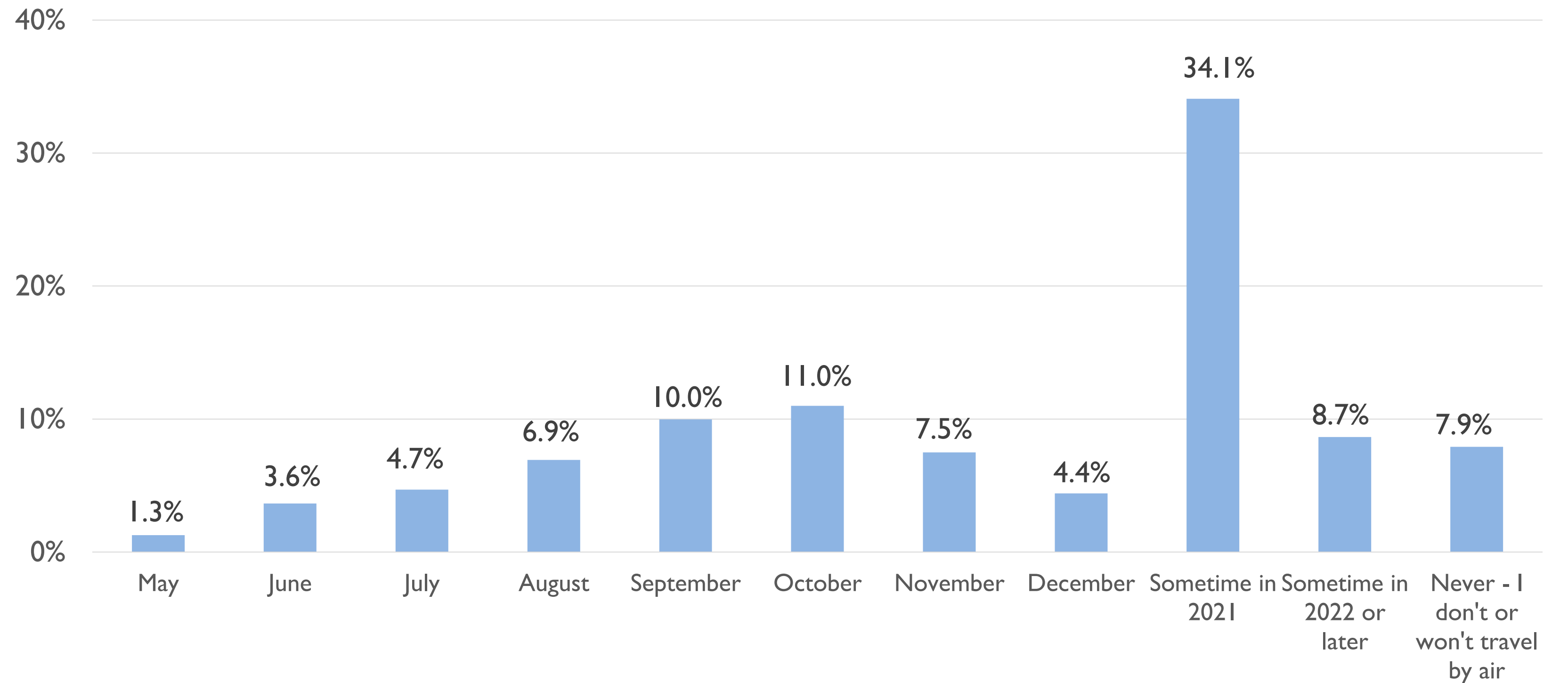
(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

American Travelers' Next Flight on a Commercial Airline

Half of American travelers feel it is too risky to travel on an airplane right now, with 42.8% saying their next trip by air will not be until 2021 or later.

Millennial and GenZ travelers are somewhat less uncomfortable, with more saying their next trip by air will be this year compared to older generations. Although most have some concerns about the safety of flying on commercial airlines, business travelers are the relatively most comfortable traveling by air right now.

American Travelers' Next Flight on a Commercial Airline
(as of May 3rd, 2020)



Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Desired Operational Practices on Commercial Airlines

The practices that will make travelers feel *most confident* an airline is looking out for their health are high-tech cleaning of planes' interiors between flights (44.4%) and requiring passenger health screenings (44.2%).

Question: If traveling on a COMMERCIAL AIRLINE in the future, which operational practices do you think should be used? (Select all that apply)

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

If traveling on a **commercial airline** in the future, which operational practices do you think should be used?



High-tech cleaning of plane's interior between flights (71.0%)



Passengers provided with hand sanitizer, face masks, disinfectant wipes, etc. (70.3%)



Passenger health screenings (64.8%)



Empty middle seat policy (62.2%)



Health screening required for flight crew (62.1%)



Social distancing enforced at boarding area (60.9%)



Flight crew required to wear masks and gloves (57.7%)



Plane bathroom cleaned after each use (52.4%)



Sneeze guard barriers between seats (38.6%)

Desired Operational Practices in Hotels

At hotels, guests will feel *most confident* a property is looking out for their health and safety if guests are provided with hand sanitizer, face masks, disinfectant wipes, etc. (36.8%) and the property's cleaning/sanitizing procedures are well-explained (32.0%).

When staying in a **hotel** in the future, which operational practices do you think should be used?



Guests provided with hand sanitizer, face masks, disinfectant wipes, etc. (55.9%)



Cleaning/sanitizing procedures well-explained (54.0%)



Required employee health screening (53.0%)



Cleaning activity visible in public areas during your hotel stay (51.4%)



Social distancing guidelines enforced (47.2%)



Breakfast buffets replaced by room service or grab-n-go options (46.9%)



Require employees wear masks and gloves (45.8%)



Contact-less check-in (40.1%)



Sneeze guard barriers at front desk, gift shop, etc. (36.3%)



Smartphone-based mobile room keys (34.7%)



Floor markings for social distancing (30.3%)



Automated restaurants (14.8%)

Question: When staying in a hotel in the future, which operational practices do you think should be used?

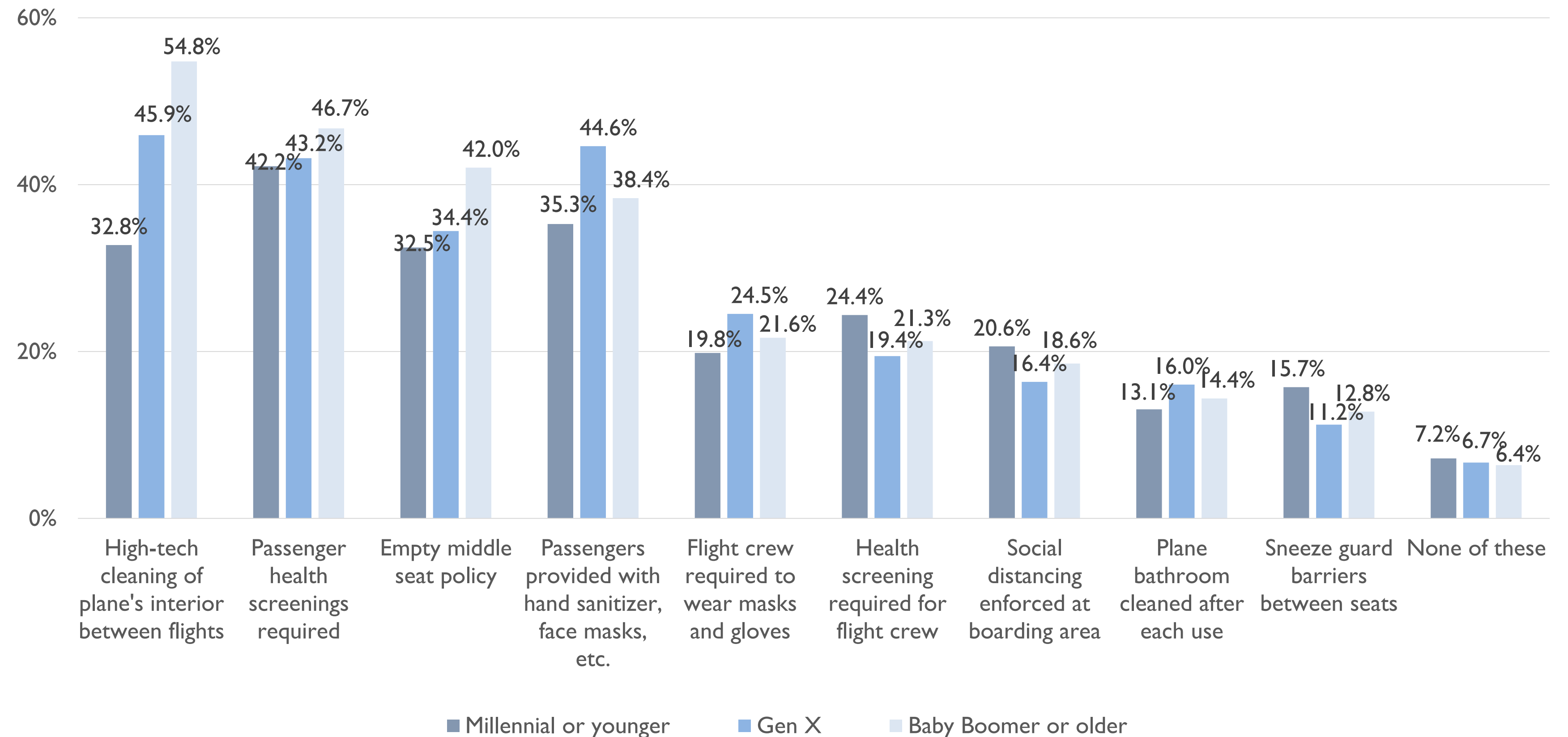
(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Desired Operational Practices on Commercial Airlines—by Generation

Younger travelers show less agreement that these new operational practices for airlines and hotels should go into effect.

Interestingly, however, what would inspire the most confidence in them about airlines is passenger health screening. Millennial and GenZ travelers are also a little more likely than older travelers to want sneeze guards between seats and social distancing enforced at boarding area.

Operational Practices on Commercial Airlines—by Generation



Question: If traveling on a COMMERCIAL AIRLINE in the future, which operational practices would MAKE YOU FEEL MOST CONFIDENT that the airline is looking out for your health? (Please select the 3 that would be most important to you)

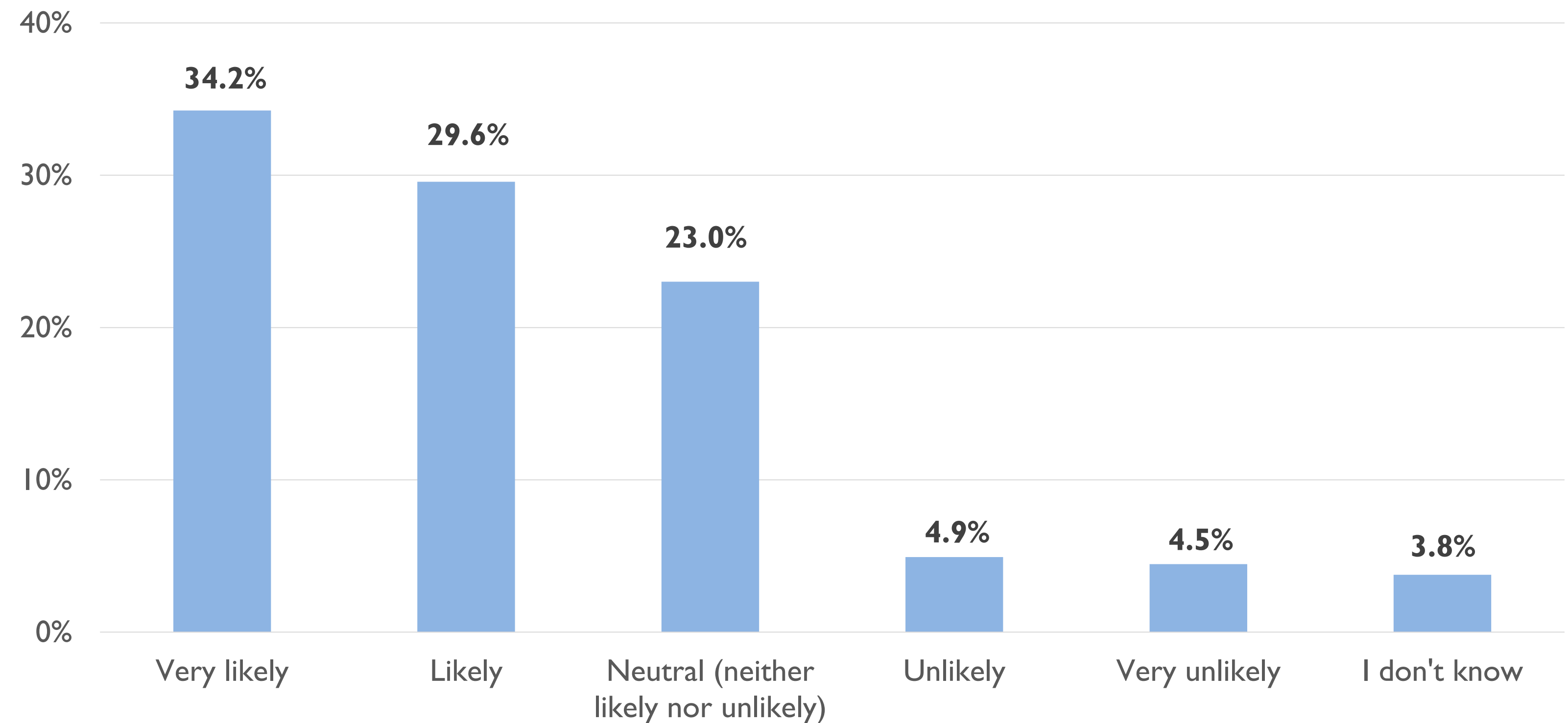
(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Likelihood to Withhold Future Purchases from Businesses

We should expect shaming to occur.

63.8% of American travelers say they would be likely to withhold business from a company if it was operating in a way that did not make them feel confident the company was looking out for their health. 68.8% say they would share that experience with others.

Likelihood Americans Would Withhold Future Purchases from Businesses That Aren't Looking Out for Customer Health



Question: In the coming months, suppose a business (a restaurant, retail store, airline, hotel, etc.) operates in a way that DOES NOT MAKE YOU FEEL CONFIDENT that they are looking out for your health. How likely would you be to withhold future purchases from that business?

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

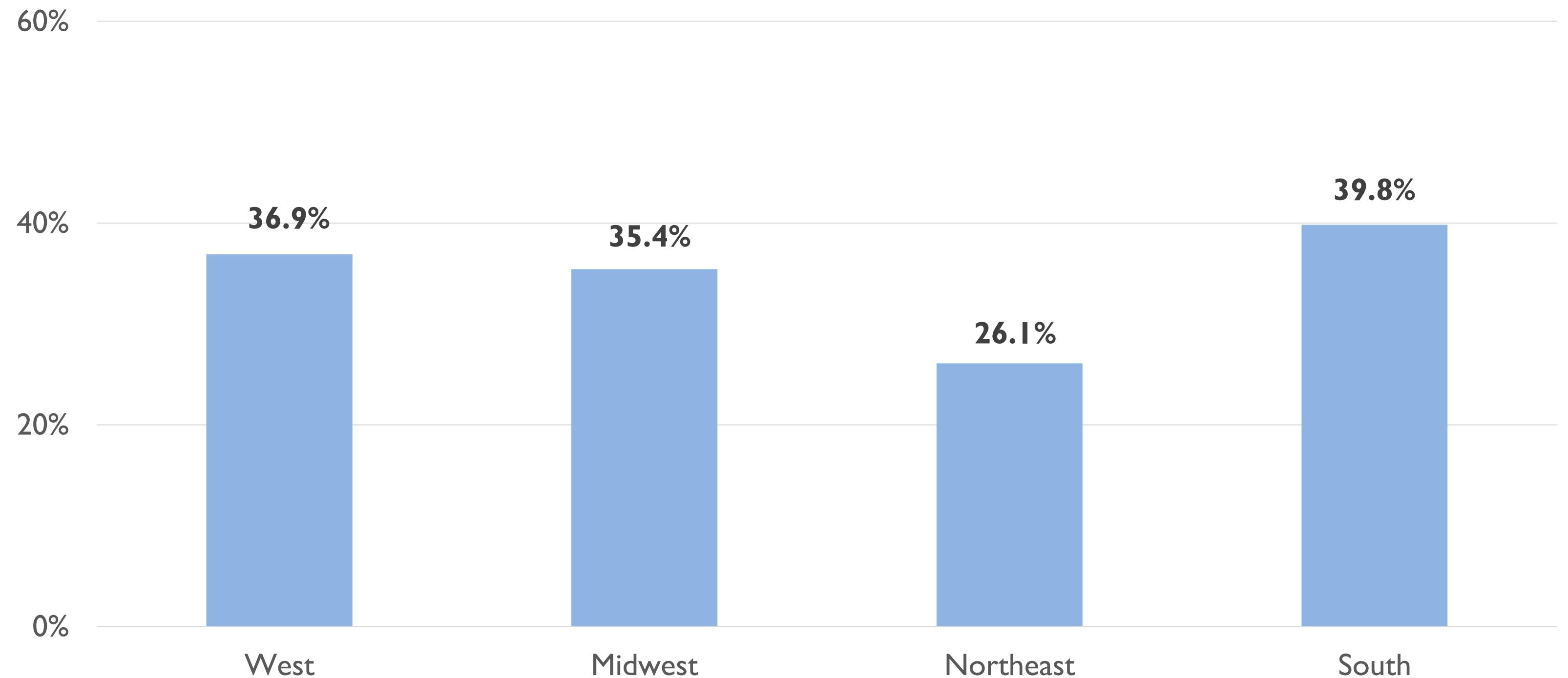
Comfort with Home State Re-Opening

Americans appear largely uncertain about the reopening.

Overall, 35.3% of American travelers say they are comfortable with their home state re-opening its economy right now. While there appears little difference by generation, as expected, there are significant differences by region of residence—only 26.1% of travelers in the Northeast are comfortable with this, while 39.8% of those in the South are.

Americans Comfortable with Their Home State Re-Opening—by Region

(% of respondents in each region who “agree” or “strongly agree” with the statement “I am comfortable with my home state re-opening its economy right now.”)



Question: How much do you agree with the following statement?

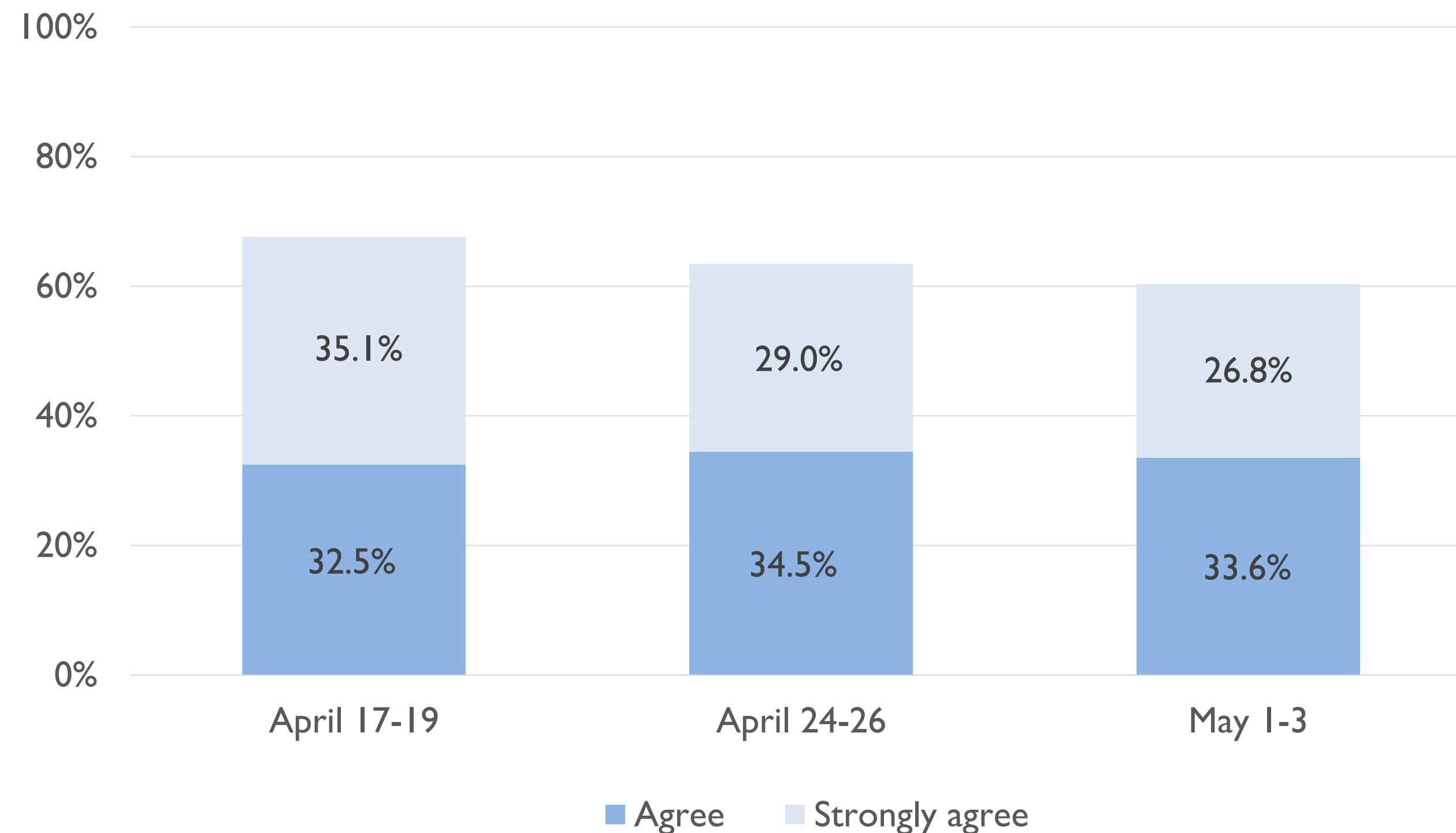
Statement: I am comfortable with my home state re-opening its economy right now.

(Base: Wave 8. 1,204 completed surveys. Data collected May 1-3, 2020)

Travelers in Community

The percent of American travelers agreeing they don't want travelers in their community right now is still notable at 60.4%, but down from 67.6% April 19th.

Americans Who Don't Want Travelers Coming to their Community Right Now



Question: How much do you agree with the following statement?

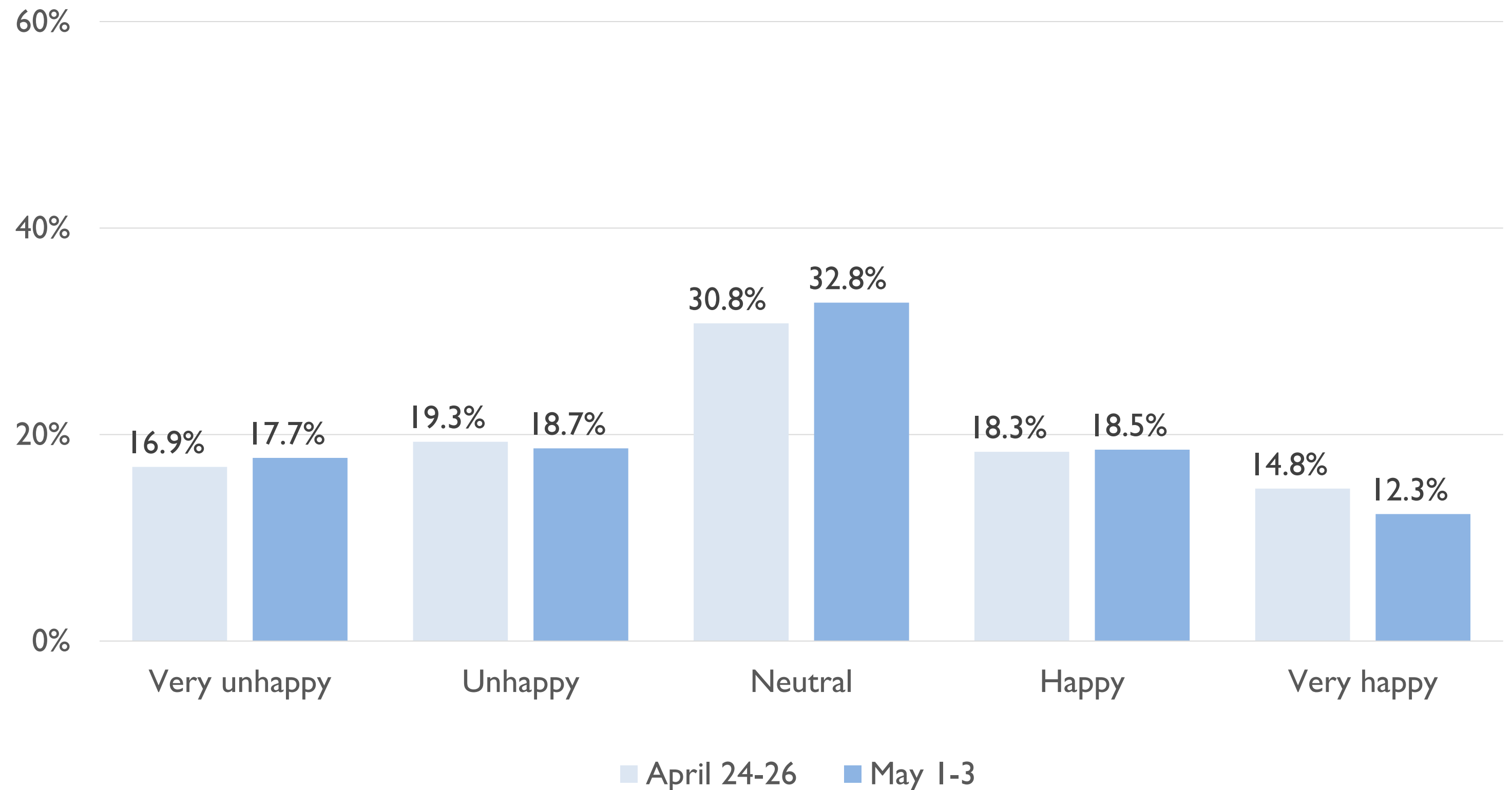
Statement: I do not want travelers coming to visit my community right now.

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

On Seeing Advertisements for Their Home Communities

Travelers continue to be split on whether they would be happy seeing an ad right now promoting their community as a place to visit when it's safe. 36.4% say they would be unhappy, 32.8% are neutral, and 30.8% would be happy.

Feeling About Seeing Ads that Promote Home Community for Tourists to Visit



Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

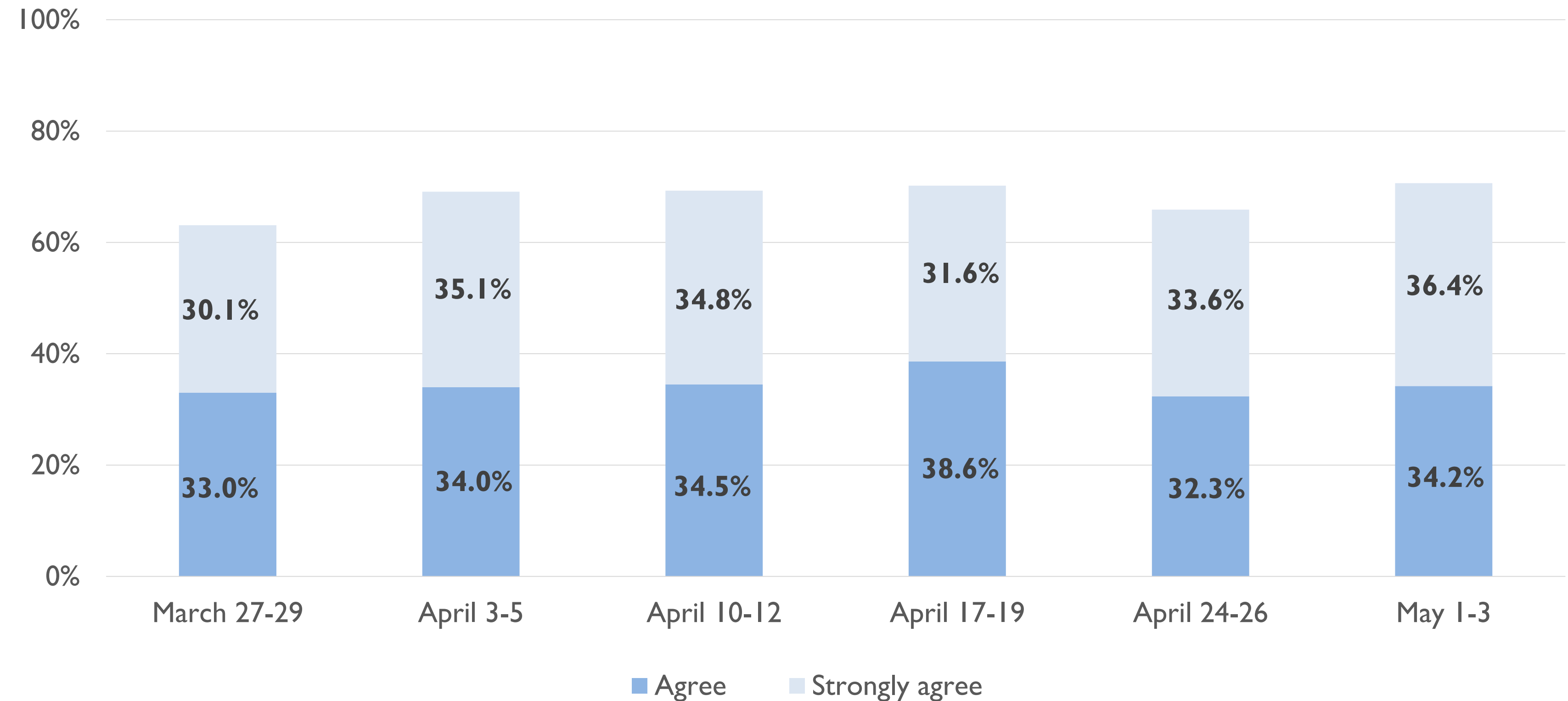
(Base: Waves 7--8. All respondents, 1,208 and 1,204 completed surveys. Data collected April 24-26 and May 1-3, 2020)

Excitement to Get Back to Travel

Americans Who Miss Traveling and Can't Wait to Get Out and Travel Again

Travel is still missed.

70.6% of Americans say they miss traveling, especially the most frequent travelers. Many travelers expressed an excitement to return to travel when they feel it is safe, which will include the travel industry's participation in adopting health/safety protocols.



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



Coronavirus Travel Sentiment Index

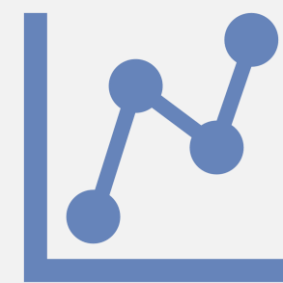
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of May 4th

What is a Predictive Index?



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



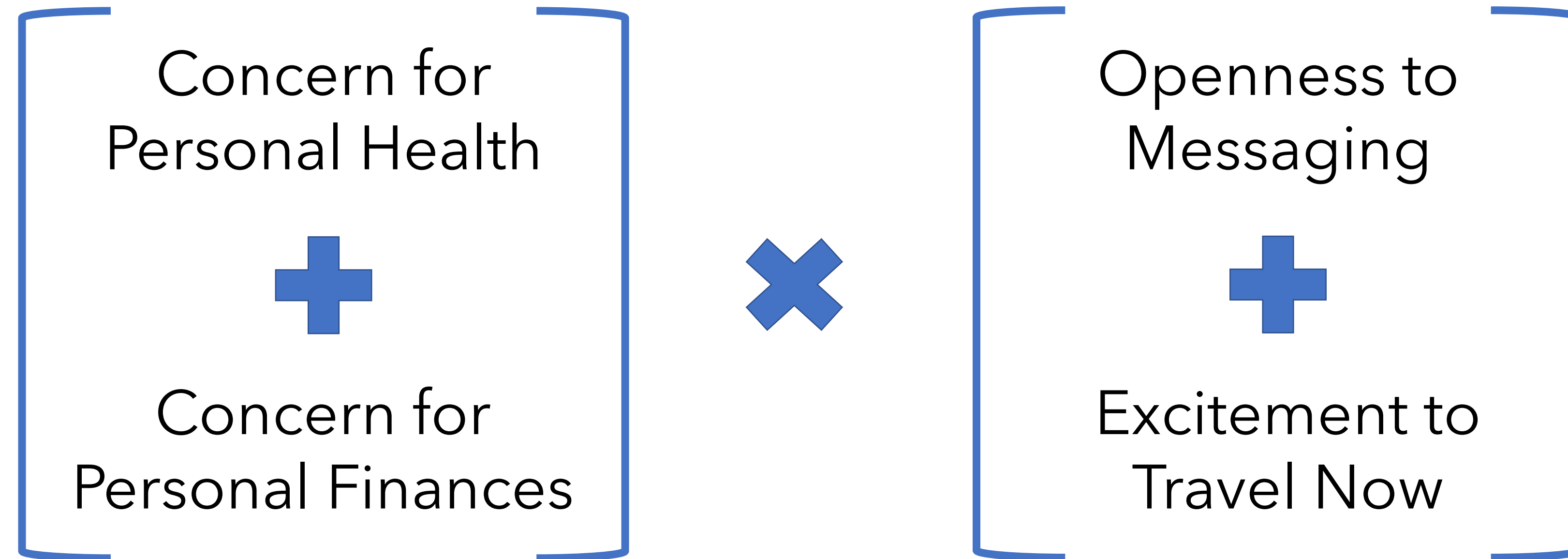
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

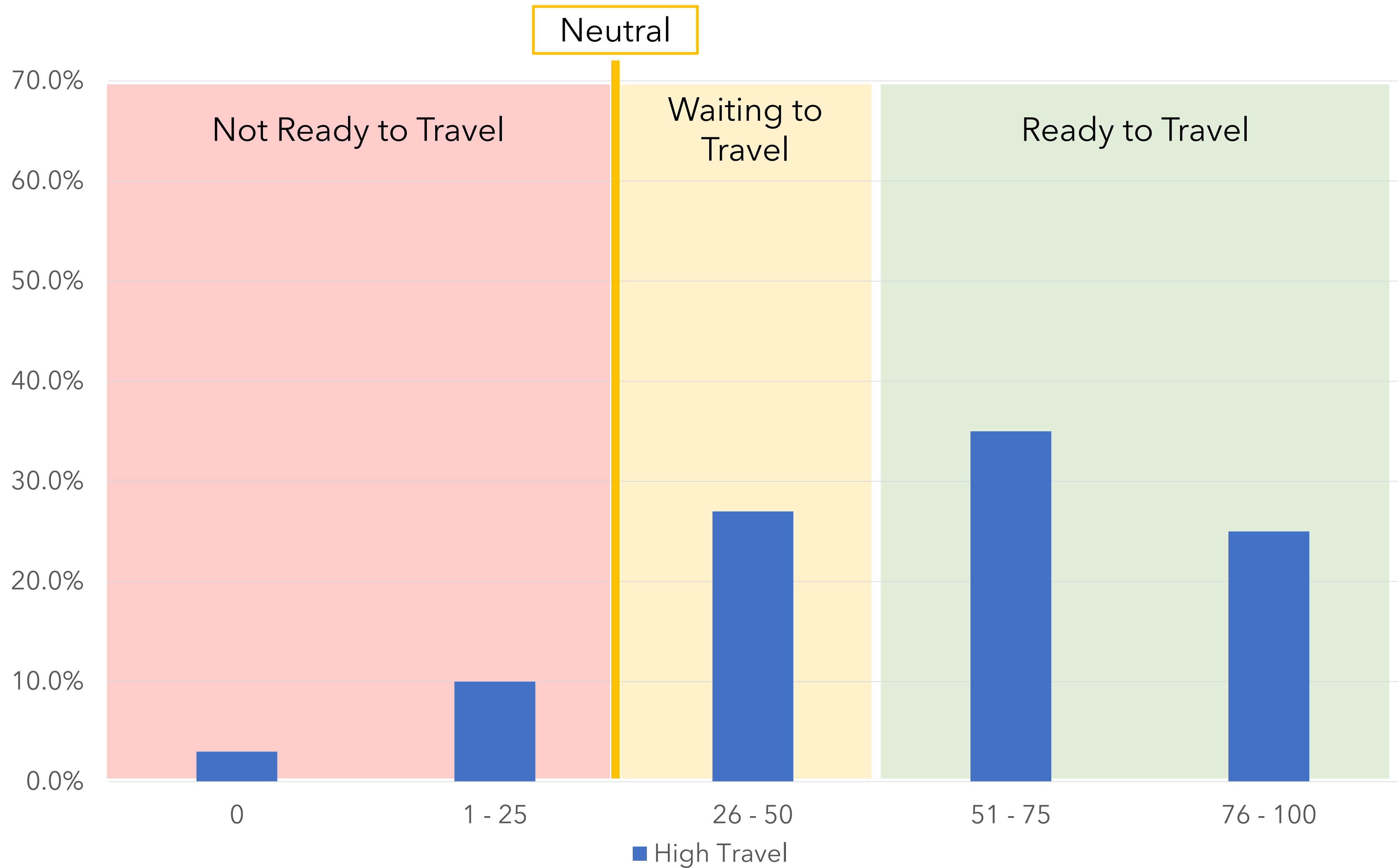
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

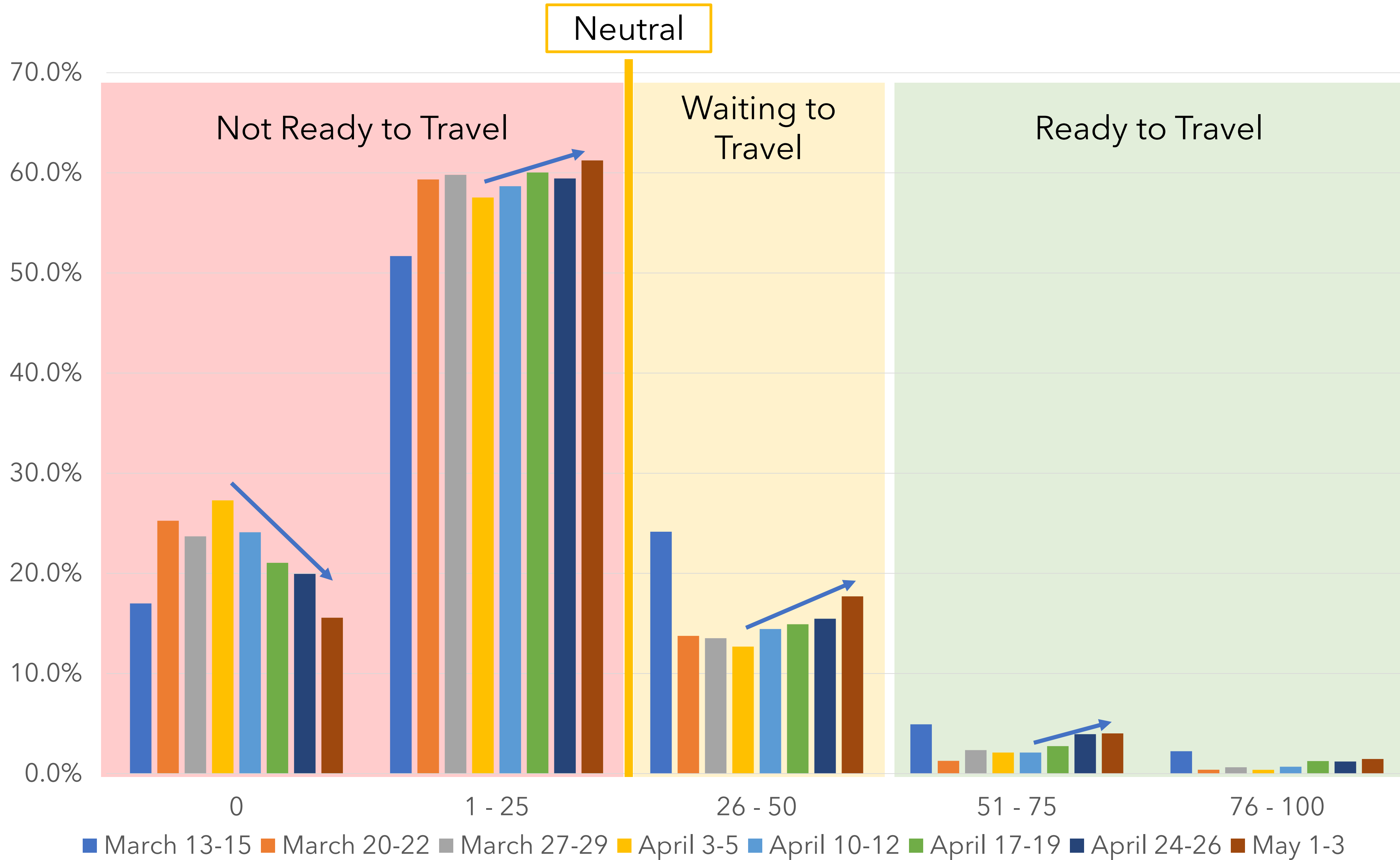


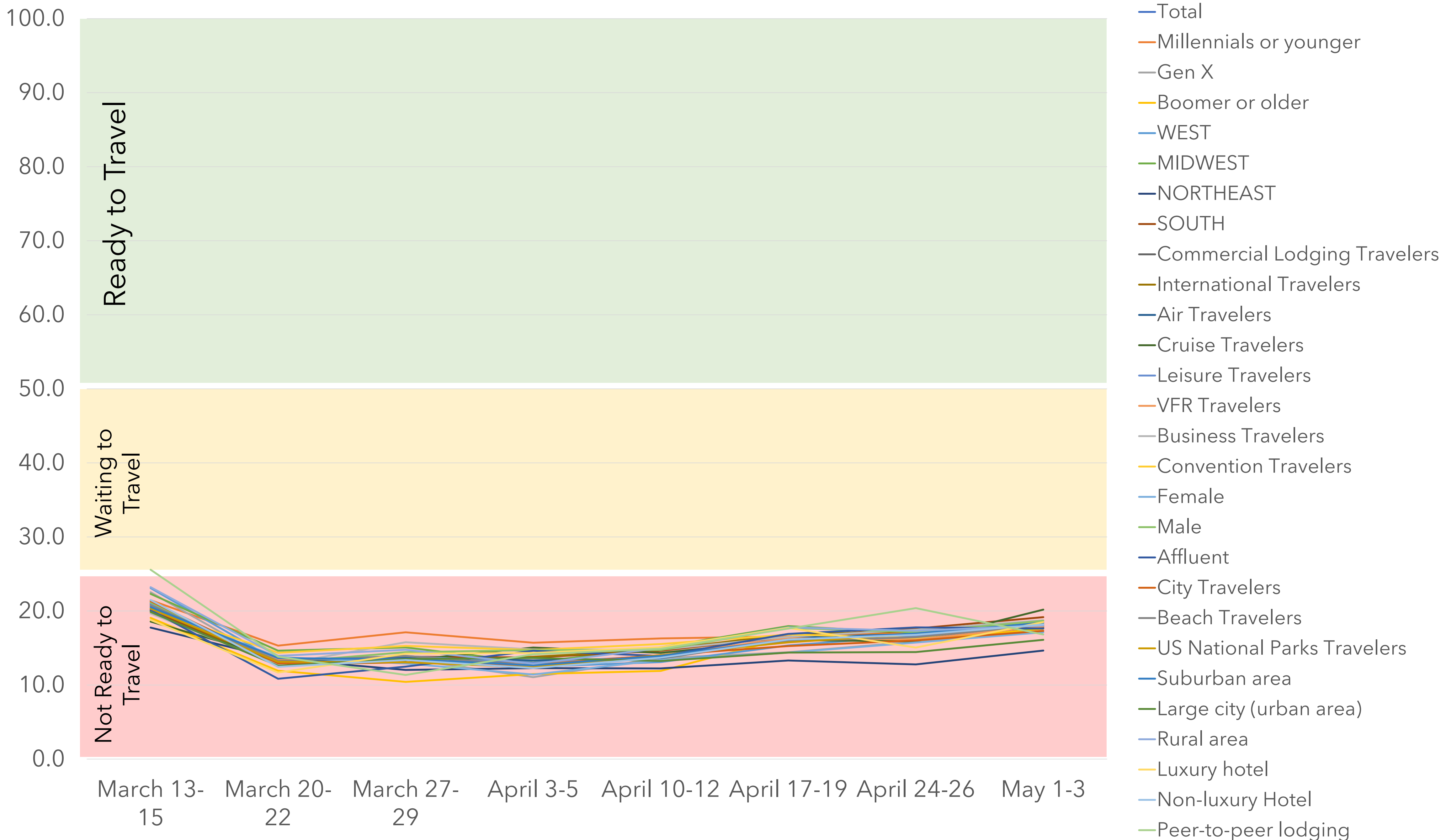
*Normalized to a 100pt scale

Healthy Travel Outlook



Travel Outlook: Week of May 4th

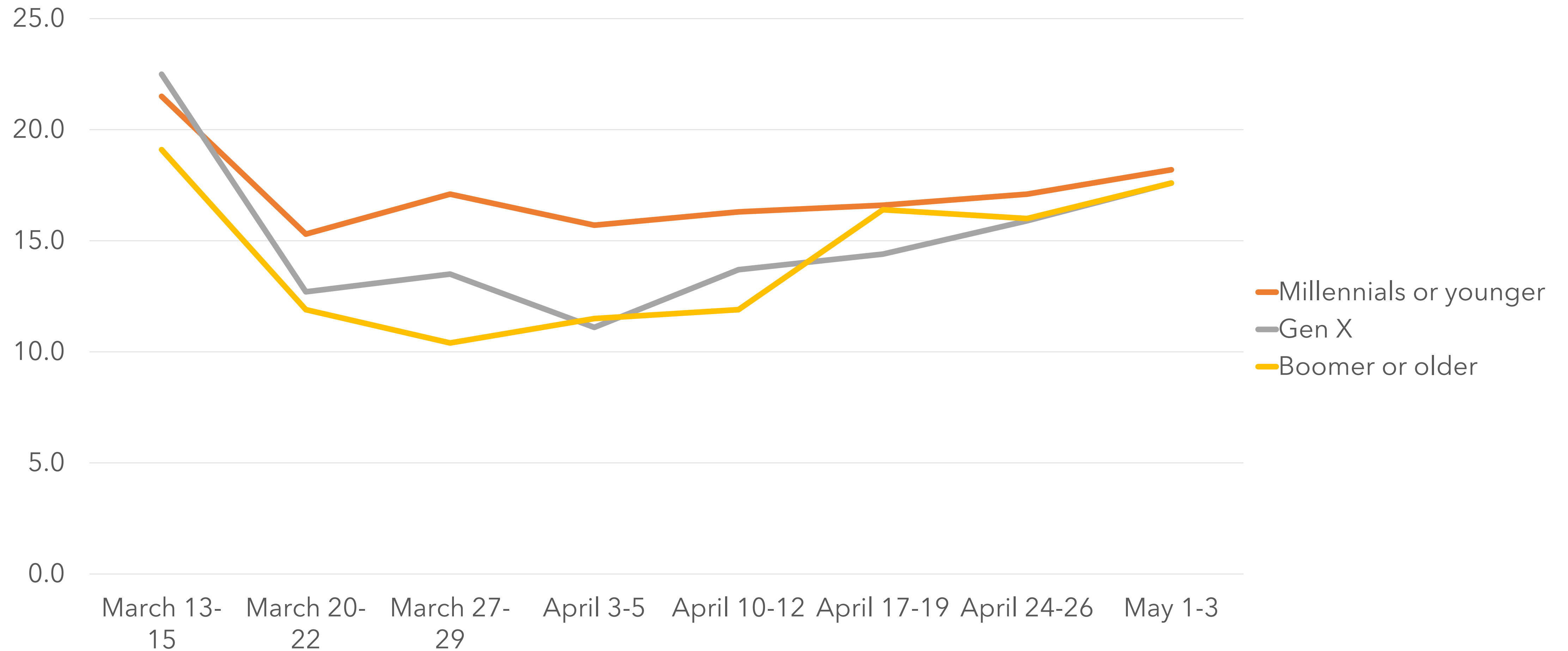




Generation

Points of Interest Impacting Index Scores:

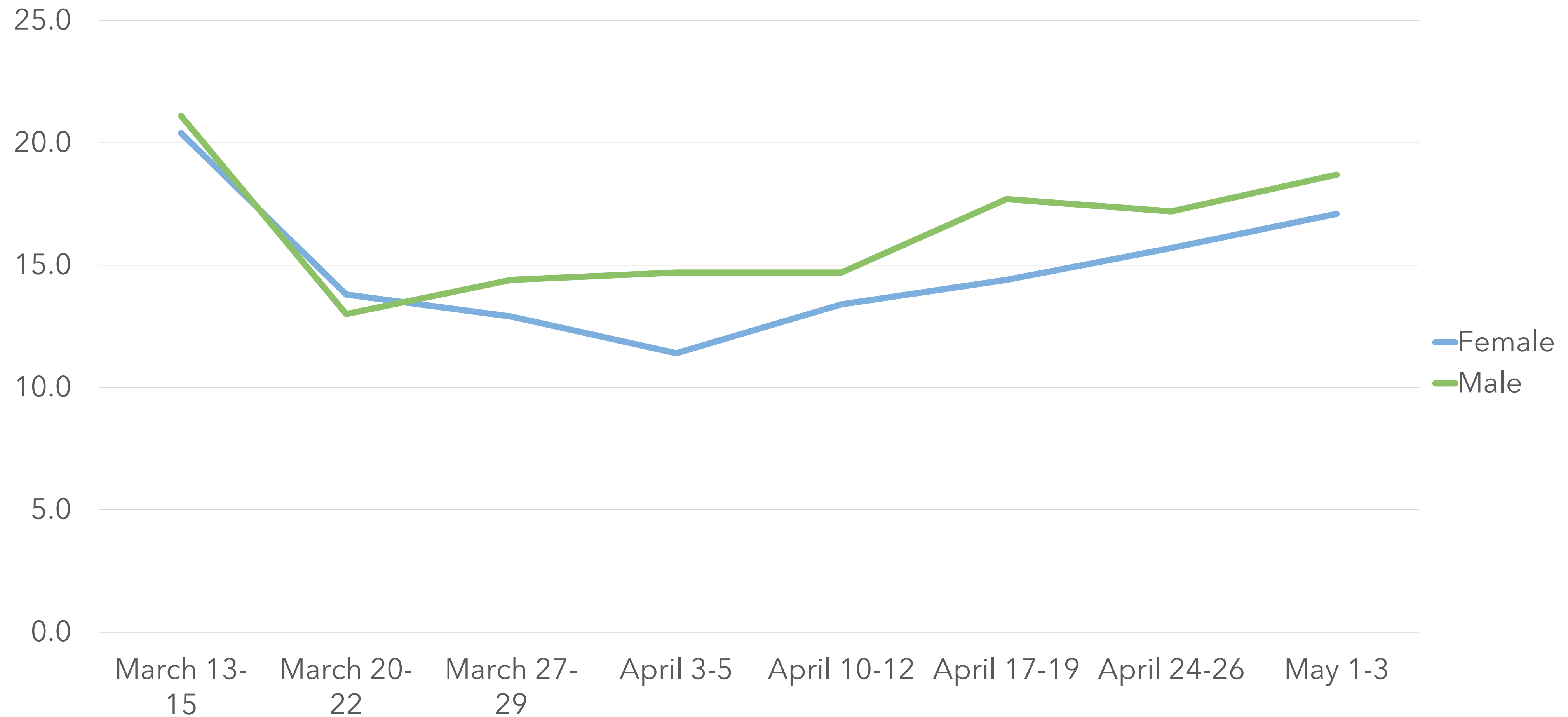
- All generations this week showed similar levels of concern for personally contracting the virus, a significant shift from the differences seen in previous weeks.
- Boomers this week continued to show the most concern for the national economy.
- Millennials are the first to show a decrease in travel affected by the virus week over week.



Gender

Points of Interest Impacting Index Scores:

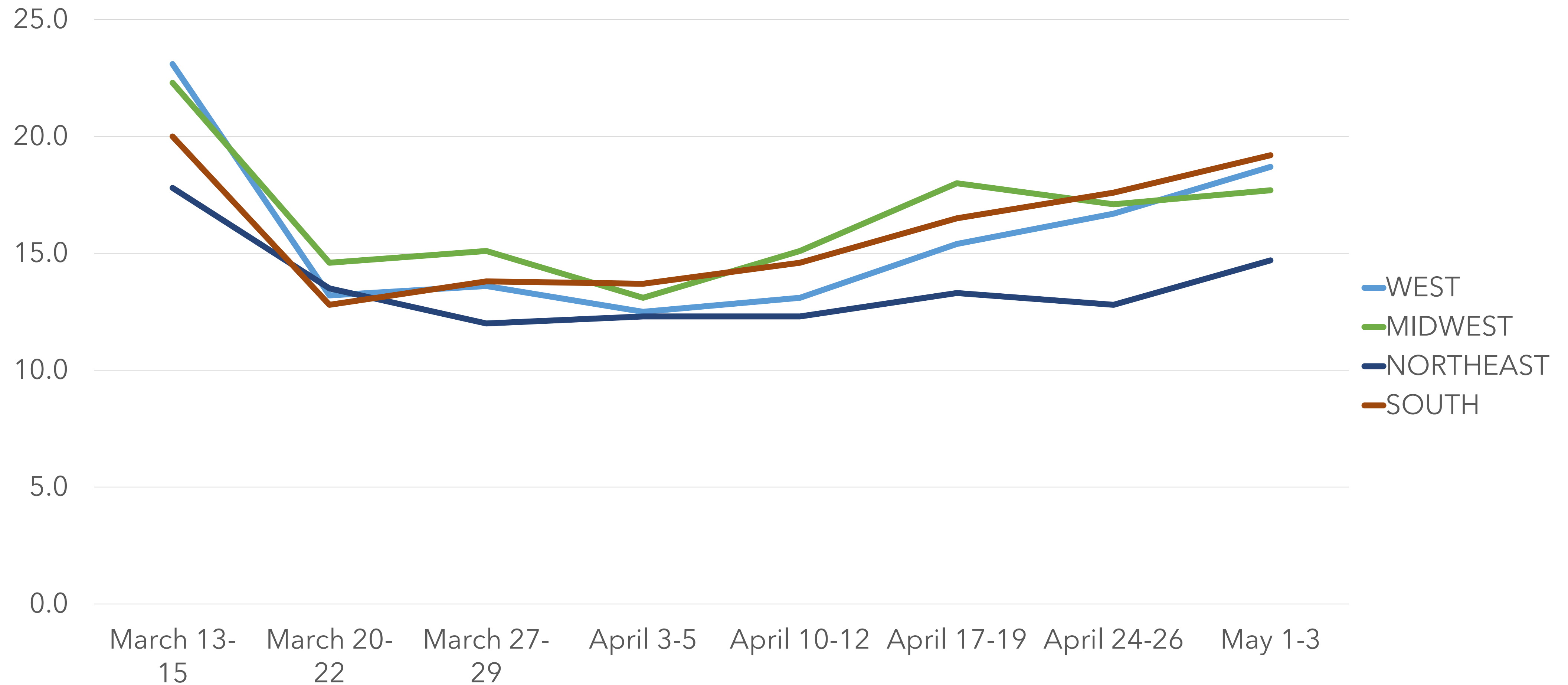
- Men and Women continued to report similar levels of both safety and financial concerns this week (previously women showing more concern)
- Men however continue to show more excitement to travel now and more openness to travel messaging
- Men more likely to say they are comfortable with their home state re-opening its economy right now (40.6% vs 30.9% 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
- South showed highest expectation to being traveling again by Fall 2020 and continued to show the most openness for travel messaging this week
- Although Midwest continued to be the least optimistic, all regions showed an increase in optimism this week being more likely to say the Coronavirus situation will get better or much better in the next month





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/>