

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF APRIL 27TH, 2020



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/>

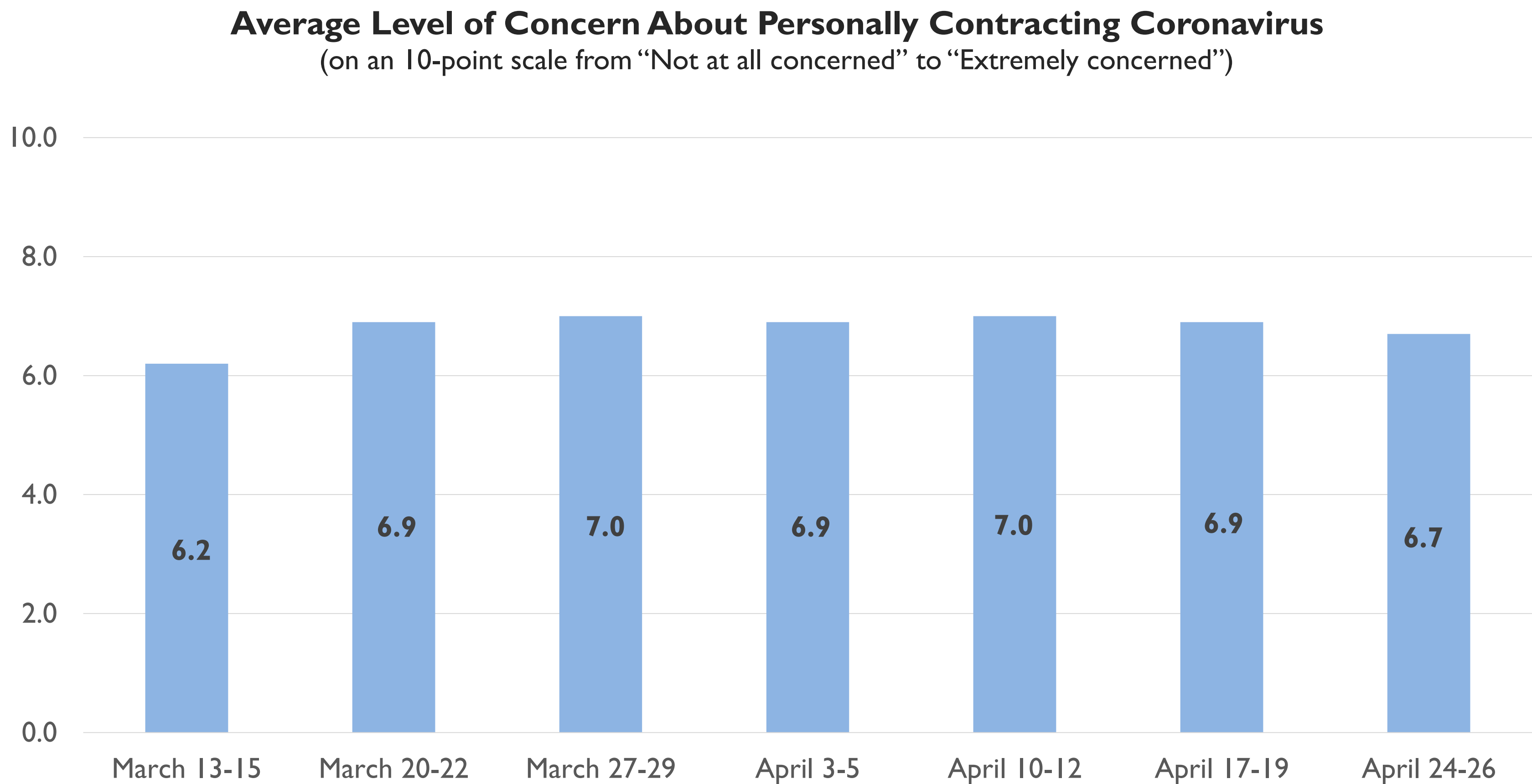
THANK YOU IN ADVANCE

Key Findings for the Week of April 27th

Please cite Destination Analysts when using or distributing this data

Personal Health Concerns

Personal concern about contracting the virus is at a 6-week low (6.7/10.0).

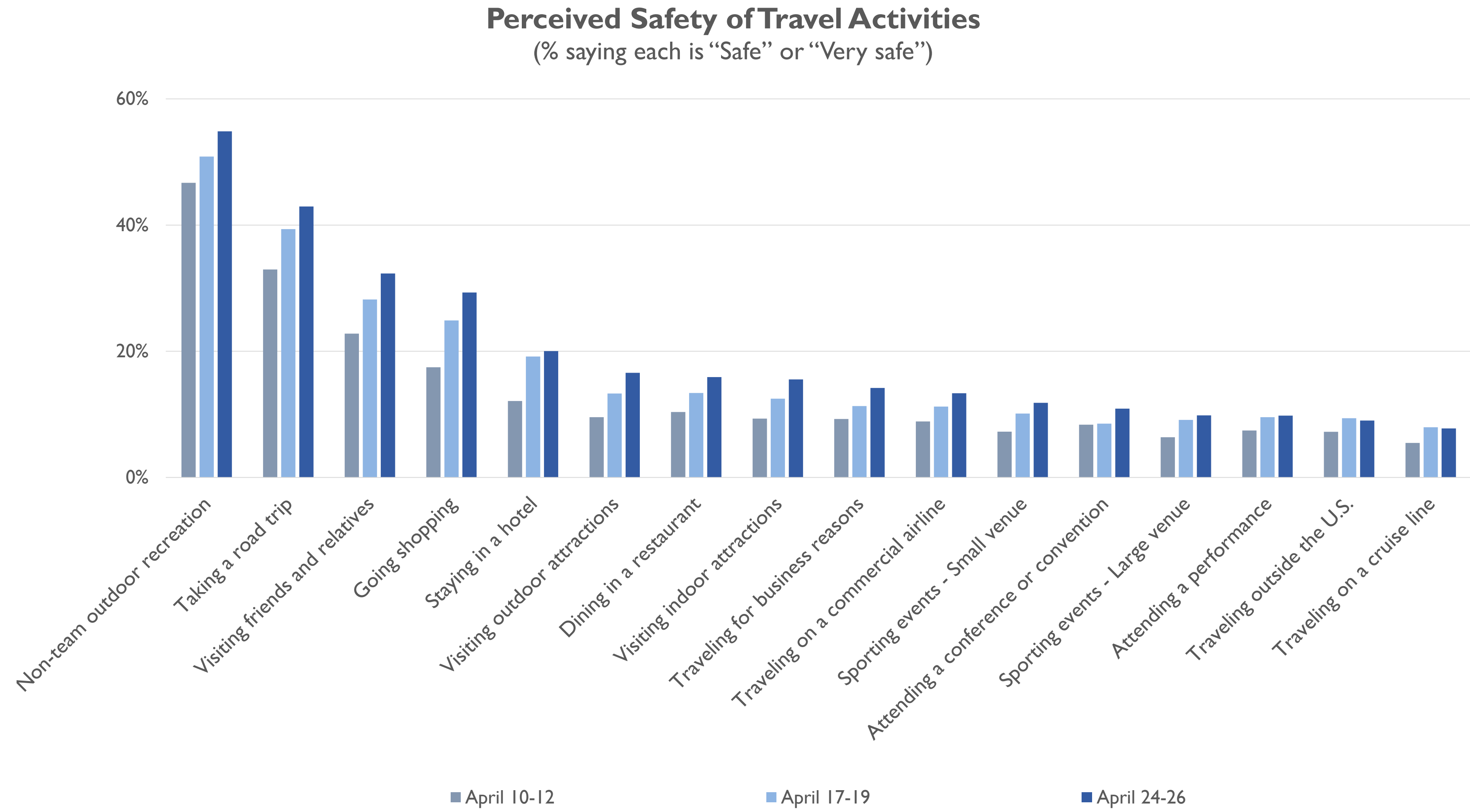


Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

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

Perceived Safety of Travel Activities

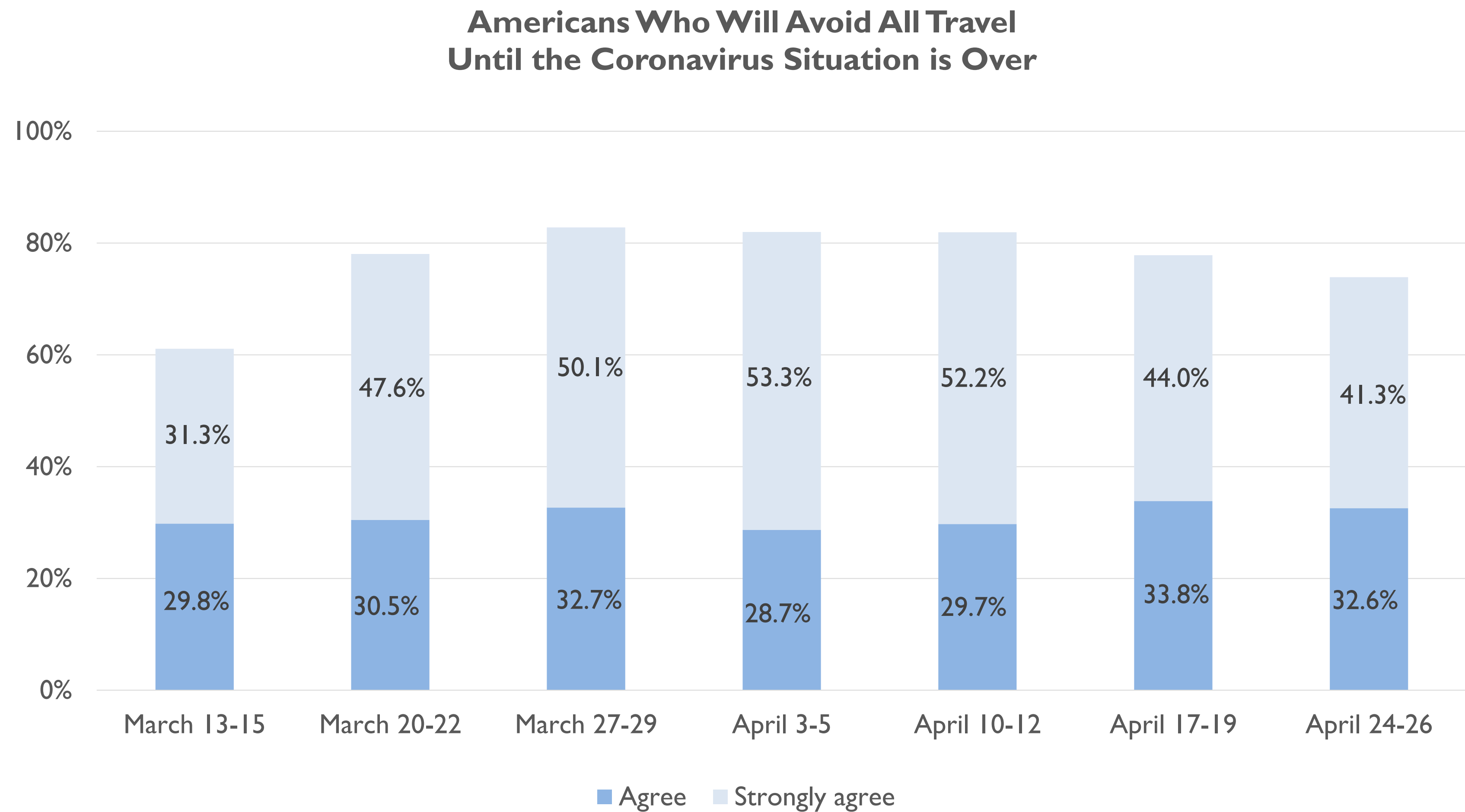
The perceived safety of large events like professional sports games and live performances remains low but continues to improve.



Question: At this moment, how safe would you feel doing each type of travel activity?
(Base: Waves 5-7. 1,263, 1,238 and 1,208 completed surveys. Data collected April 10-12, 17-19 and 24-26, 2020)

Avoiding Travel Until the Crisis Blows Over

There is continued decline in the number of Americans saying they will avoid all travel until the coronavirus situation is over.

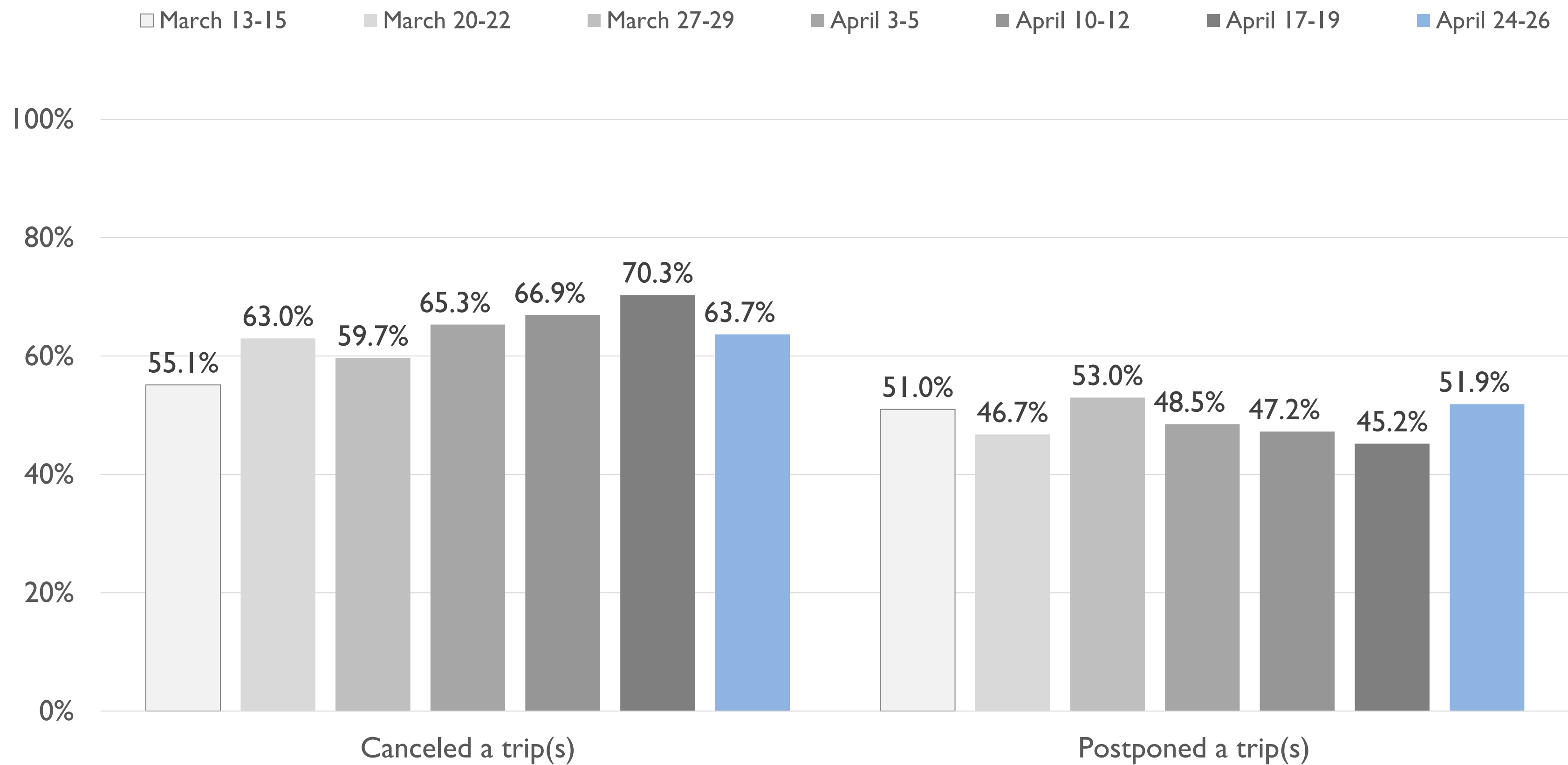


Question: How much do you agree with the following statement?
Statement: I’m planning to avoid all travel until the Coronavirus situation blows over.

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

Trip Cancellations and Postponements

The percent cancelling a trip because of the coronavirus is at a 4-week low (63.7%), meanwhile postponements are at a 4-week high (51.9%).

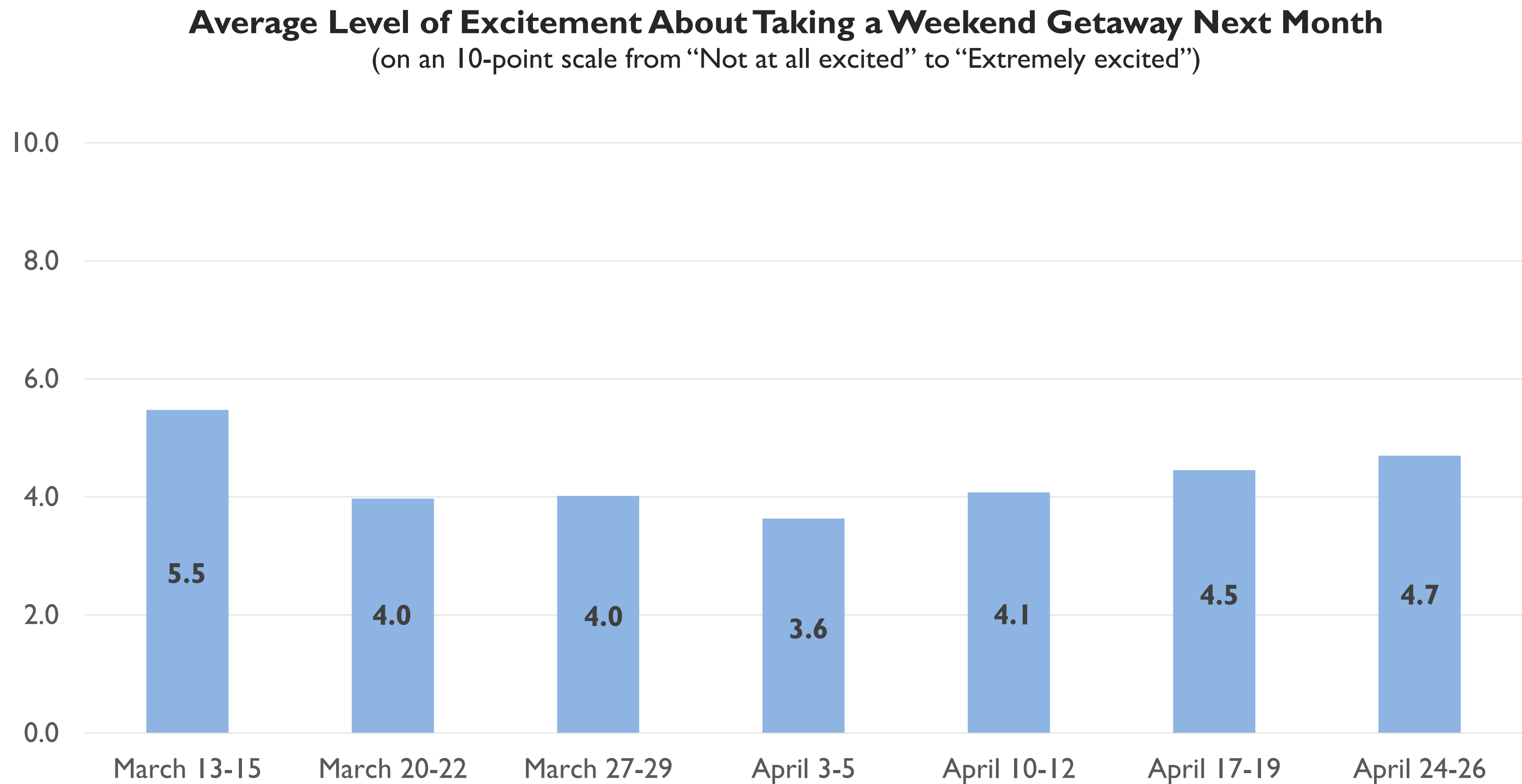


Question: How has the coronavirus situation affected your travel? (Select all that apply)
Due to the coronavirus situation, I have_____.

(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795, 890, 937, 929 and 903 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 , 10-12, 17-19 and 24-26, 2020)

Excitement About Taking a Weekend Getaway

Excitement levels to take a getaway in the next month are depressed but at a 5-week high (4.7/10.0).

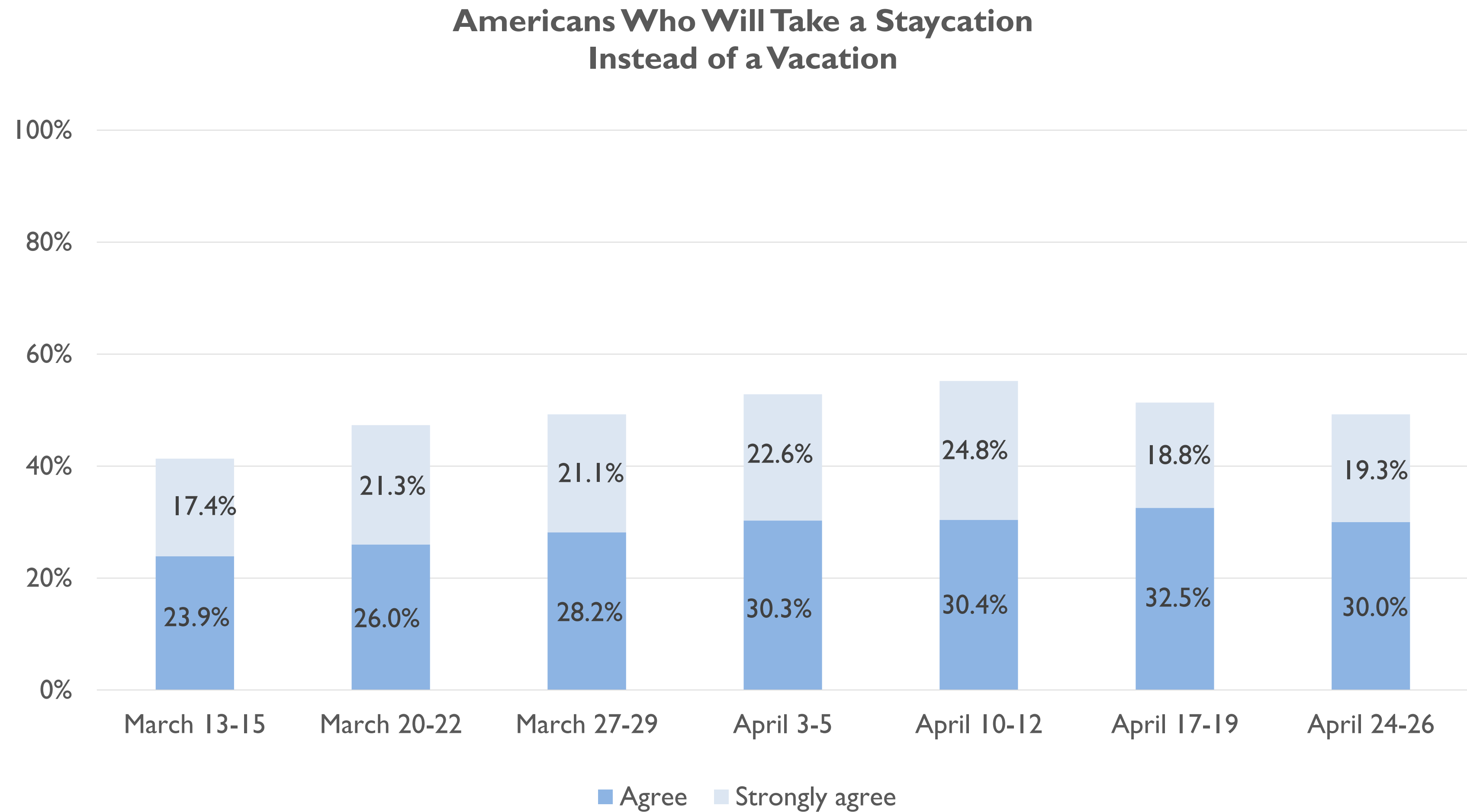


Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)

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

Staycations as a Replacement for Vacations

Agreement about staycationing is at a 3-week low (49.3%).

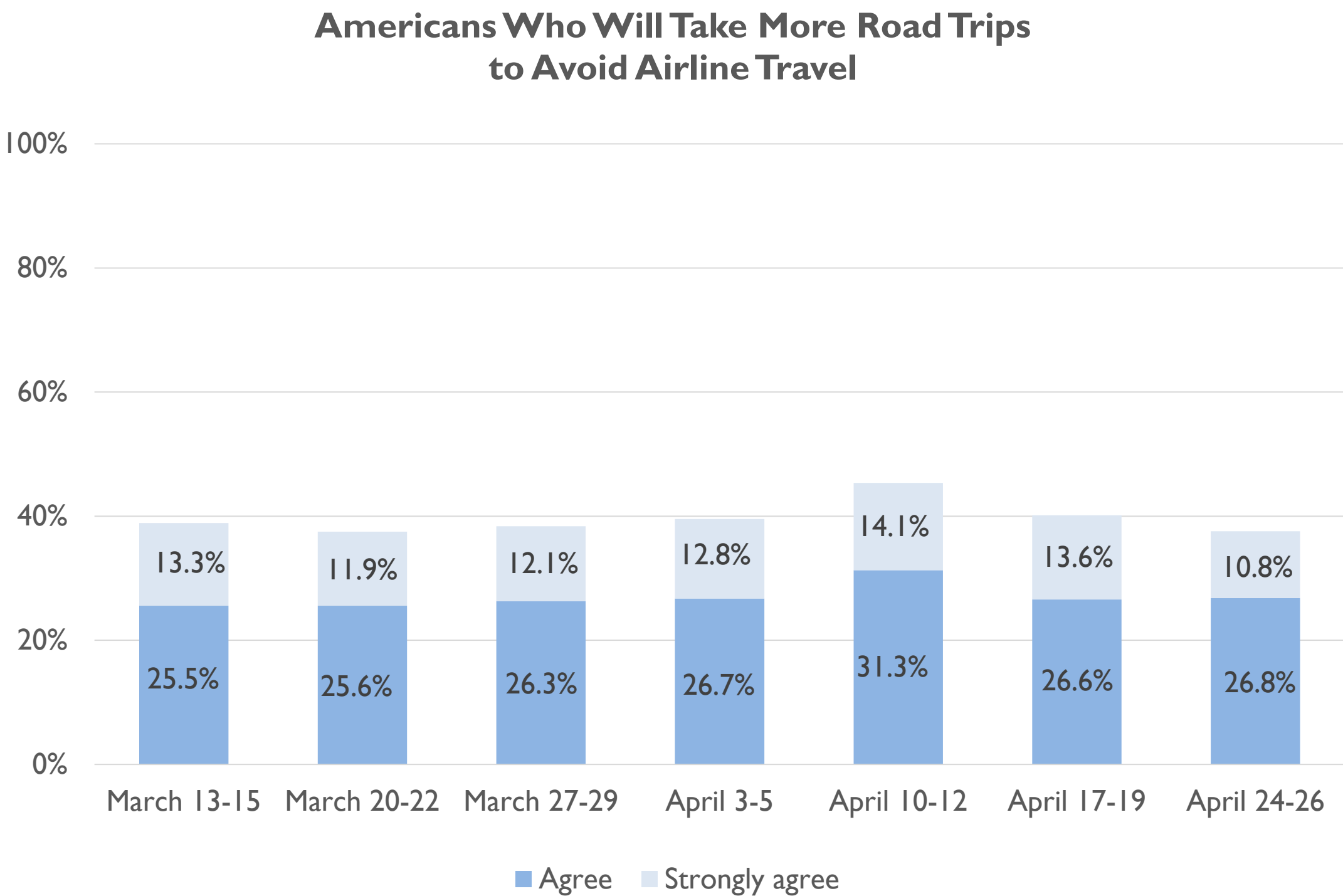


Question: How much do you agree with the following statement?
Statement: Because of the coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).

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

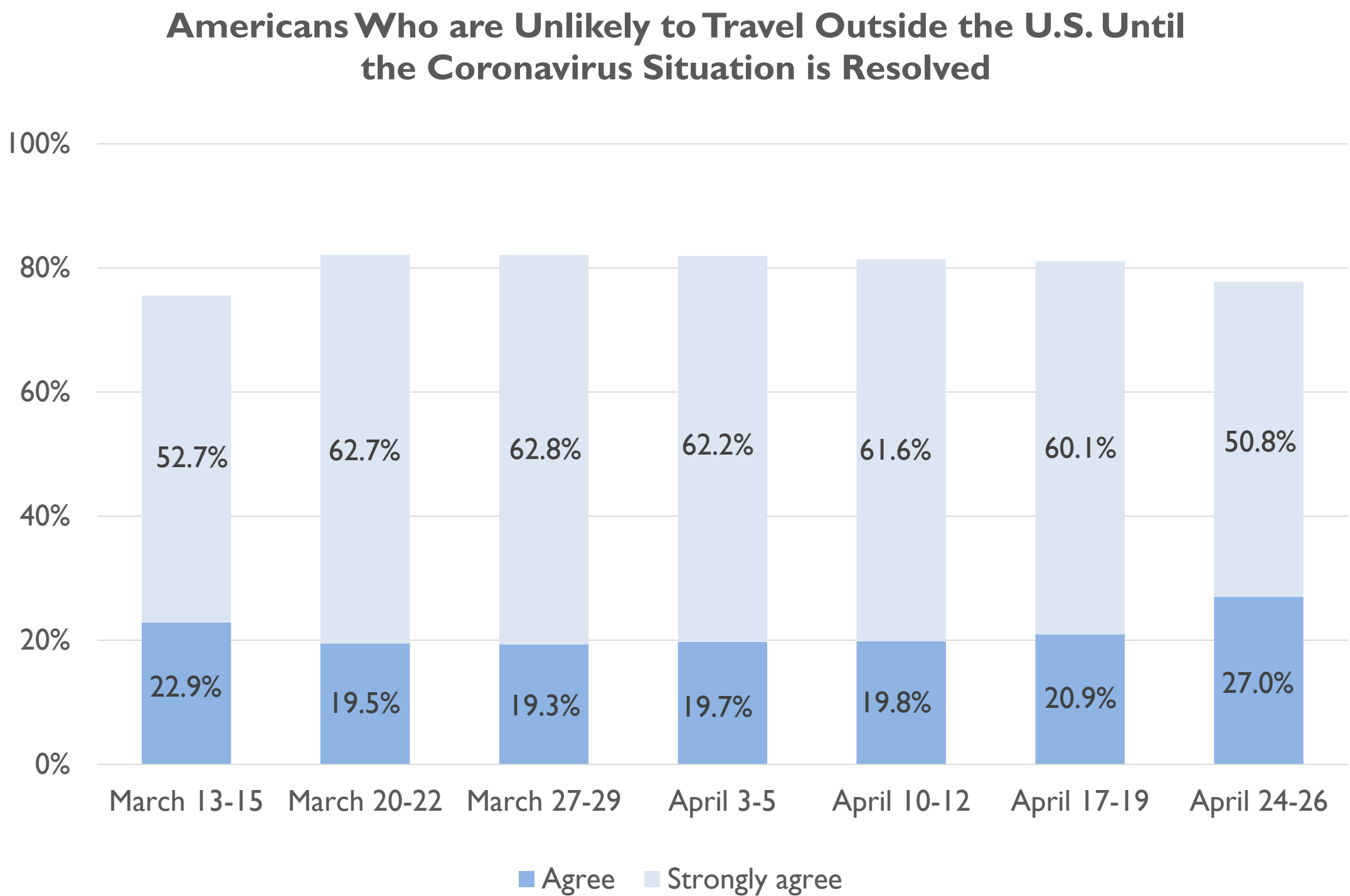
Road Trips and Travel Outside the United States

The percent who will take more road trips this year to avoid air travel (37.6%) and the percent who will avoid travel outside the United States (77.8%) are both at 6-week lows.



Question: How much do you agree with the following statement?
Statement: Because of the Coronavirus, I'll probably be taking more road trips this year to avoid airline travel.

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

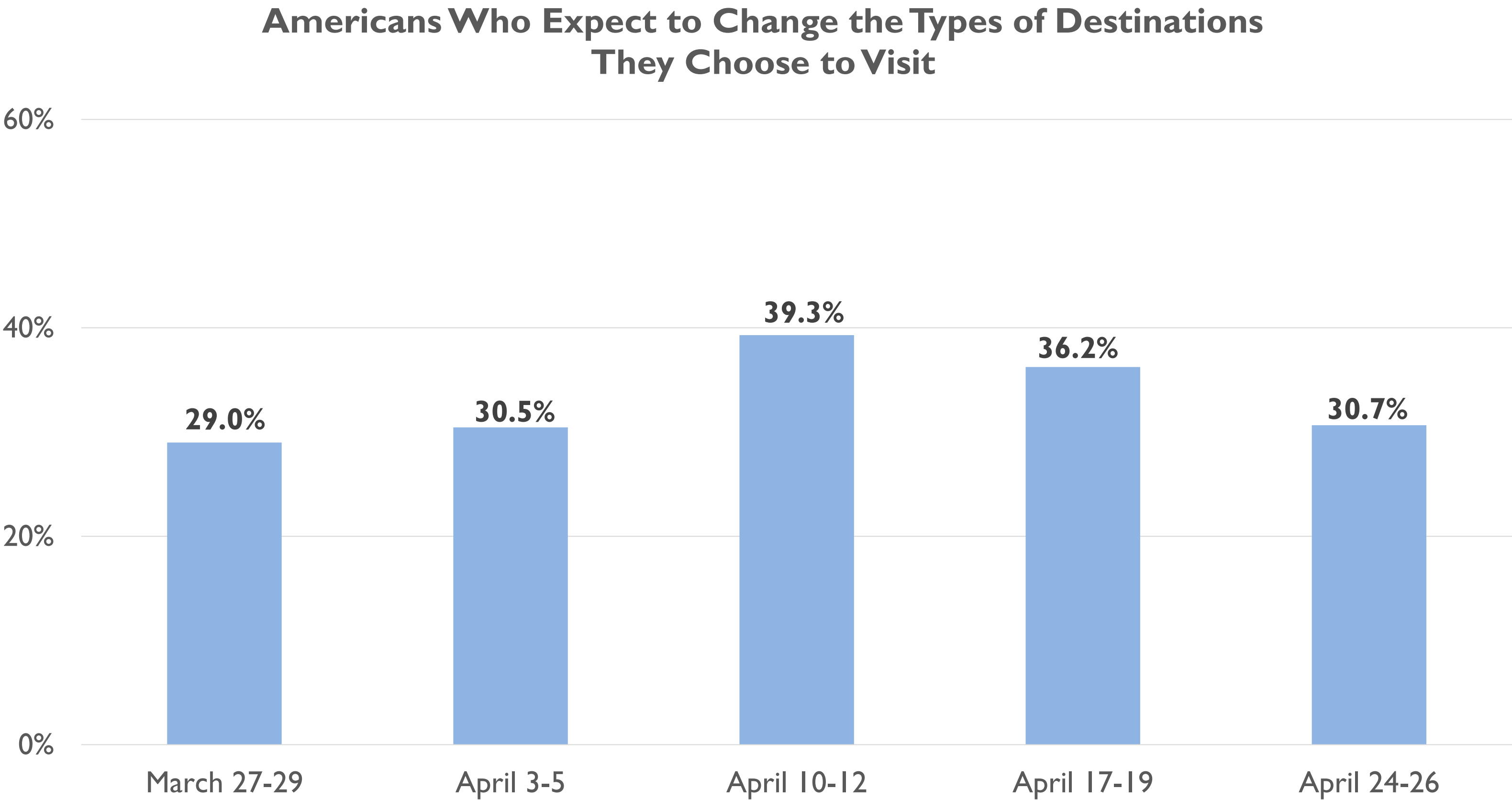


Question: How much do you agree with the following statement?
Statement: I will be unlikely to travel outside the United States until the Coronavirus situation is resolved.

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

Changing the Types of Destinations Americans Choose to Visit

The percent who say they will change the types of travel destinations they choose to visit is back down to 30.7% from a high of 39.3% on April 10th.

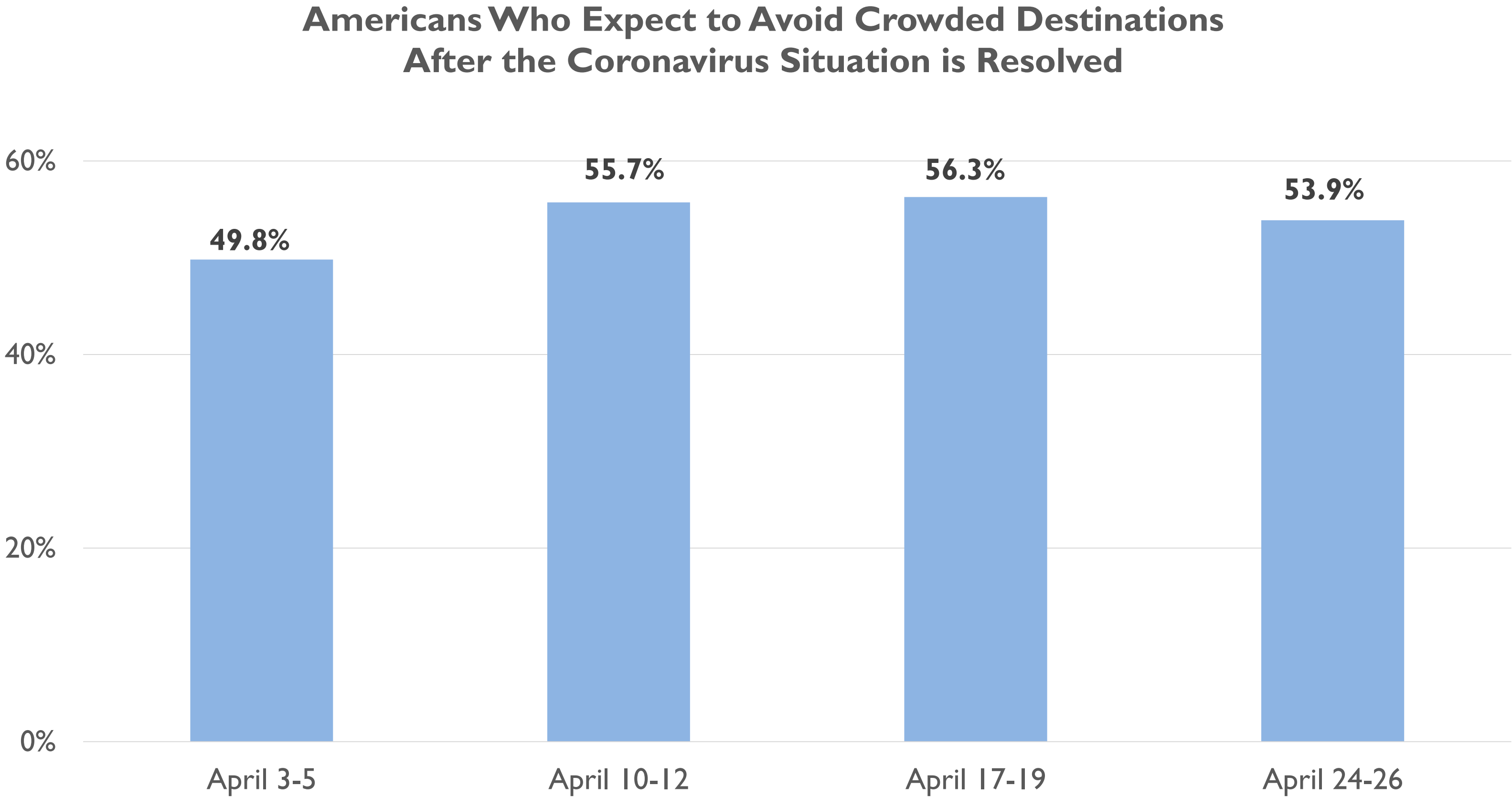


Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit? (Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

(Base: Waves 3-7. 1,201, 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected March 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

Avoiding Crowded Destinations

Over half of American travelers continue to say they will avoid crowded destinations when they travel again.



Question: Do you expect that you will avoid any of the following in the SIX (6) MONTH period immediately after the coronavirus situation is resolved? (Select all that would complete the following sentence for you) I will most likely avoid _____.

(Base: Waves 4-7. 1,216, 1,263, 1,238 and 1,208 completed surveys. Data collected April 3-5, 10-12, 17-19 and 24-26, 2020)

Feelings About Traveling Now

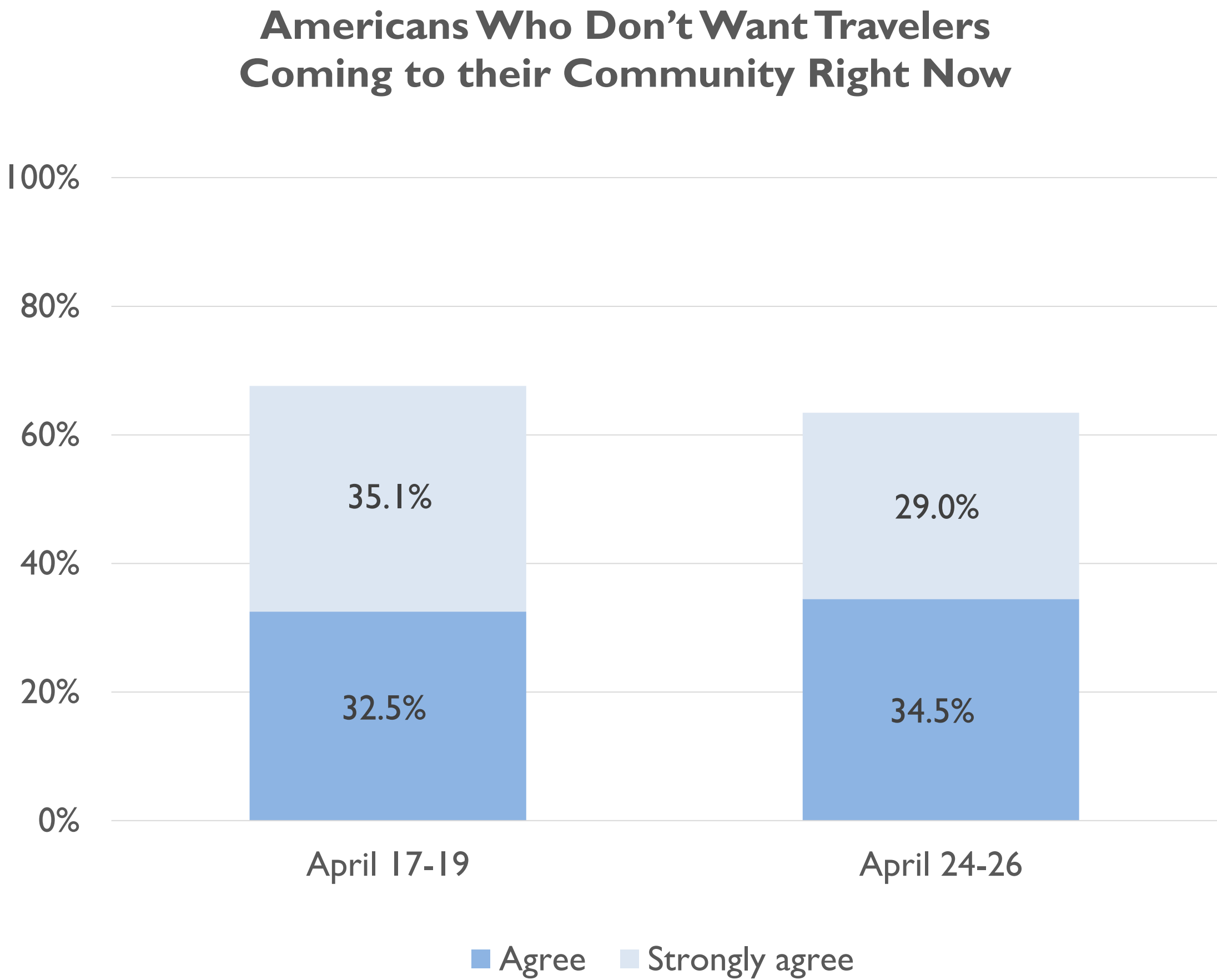
While there are more positive emotions than 5 weeks ago, Americans largely associate fear and uncertainty with travel right now.



Question: What ONE WORD best describes how you feel about travel right now?

(Base: All respondents 1,208 completed surveys. Data collected April 24-26, 2020)

This week, 63.5% agree they don't want visitors coming to their community right now, although the strength of their agreement with this sentiment has lessened.

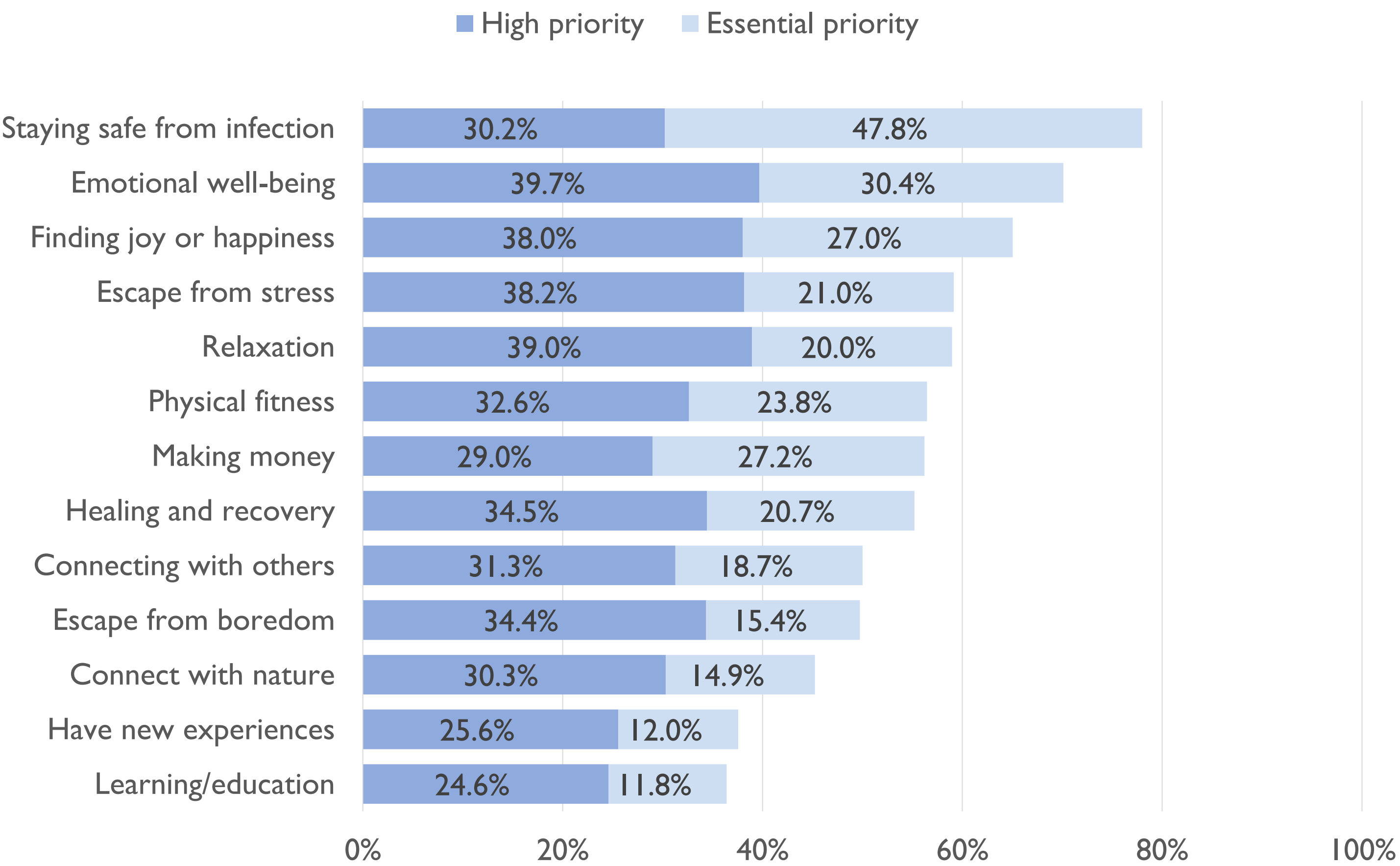


Question: How much do you agree with the following statement?
Statement: I do not want travelers coming to visit my community right now.

(Base: Waves 6-7. All respondents, 1,238 and 1,208 completed surveys. Data collected April 17-19 and 24-26, 2020)

Lifestyle Priorities

Looking at their lifestyle priorities over the next six months, Americans are most in sync on staying safe from infection (47.8%)--even more so than on making money (27.2%) or their emotional well-being (30.4%).



Question: Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.]

(Base: Wave 7. 1,208 completed surveys. Data collected April 24-26, 2020)

Operational Practices in Commercial Public Places

When asked about the operational practices they want to see used at restaurants and commercial locations like malls and sports venues, Americans are in most agreement about hand sanitizer, disinfectant wipes and well-explained cleaning procedures.

Question: Moving forward, which of these would you want to see as common business practices? (Select all that apply)

(Base: Wave 7. 1,208 completed surveys. Data collected April 24-26, 2020)

When thinking about visiting commercial public locations like theme parks, sports venues and malls, what operational practices will you want to see used?



Provide hand sanitizer (64.1%)



Provide disinfectant wipes (57.3%)



Cleaning activity during your stay (55.9%)



Clean procedures well-explained (55.1%)



Required employee health screening (51.9%)



Enforces social distancing (49.6%)



Sneeze guards/other barriers (47.5%)



Requires employees wear masks (43.4%)



Body temperature screening upon entry (42.1%)



Requires employees to wear gloves (42.1%)



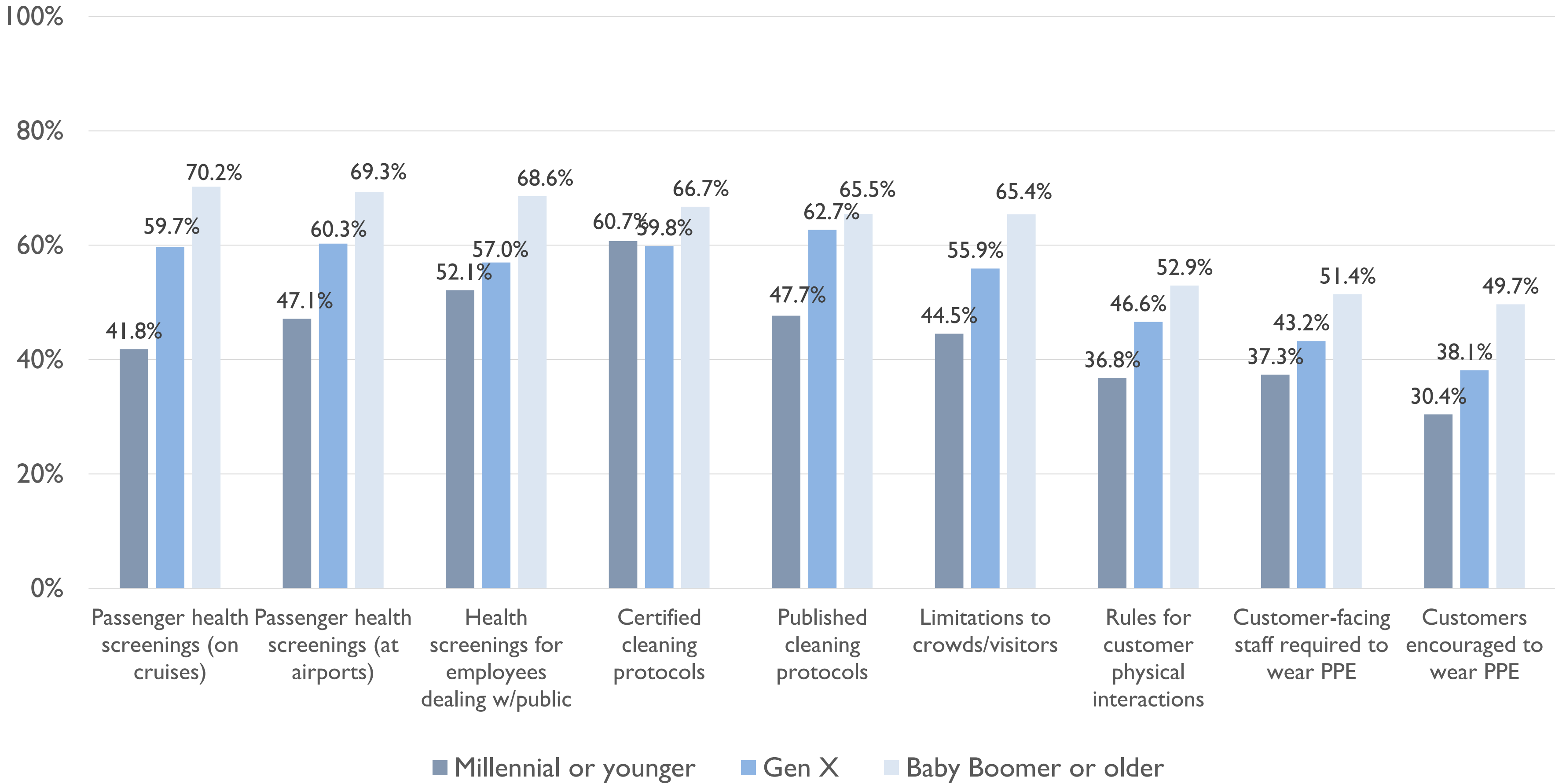
Encourage visitors to wear masks (41.9%)



Pre-arrival health questionnaire (30.8%)

Common Business Practices

However, in what becomes common business practices, Boomers want new policies like health screenings more than younger travelers.



Question: Moving forward, which of these would you want to see as common business practices? (Select all that apply)

(Base: Wave 7. 1,208 completed surveys. Data collected April 24-26, 2020)



Coronavirus Travel Sentiment Index

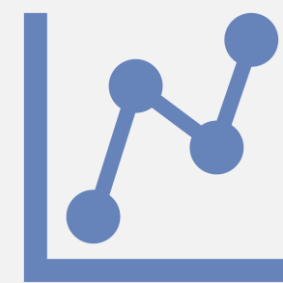
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of April 27th

What is a Predictive Index?



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



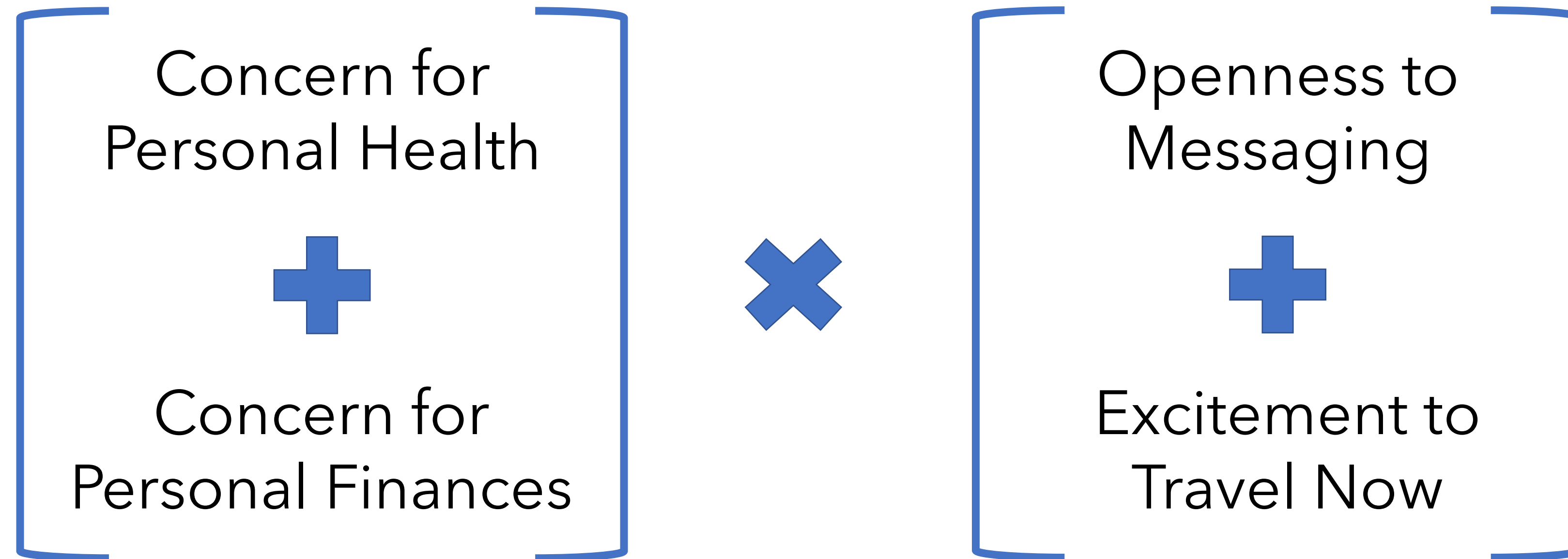
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



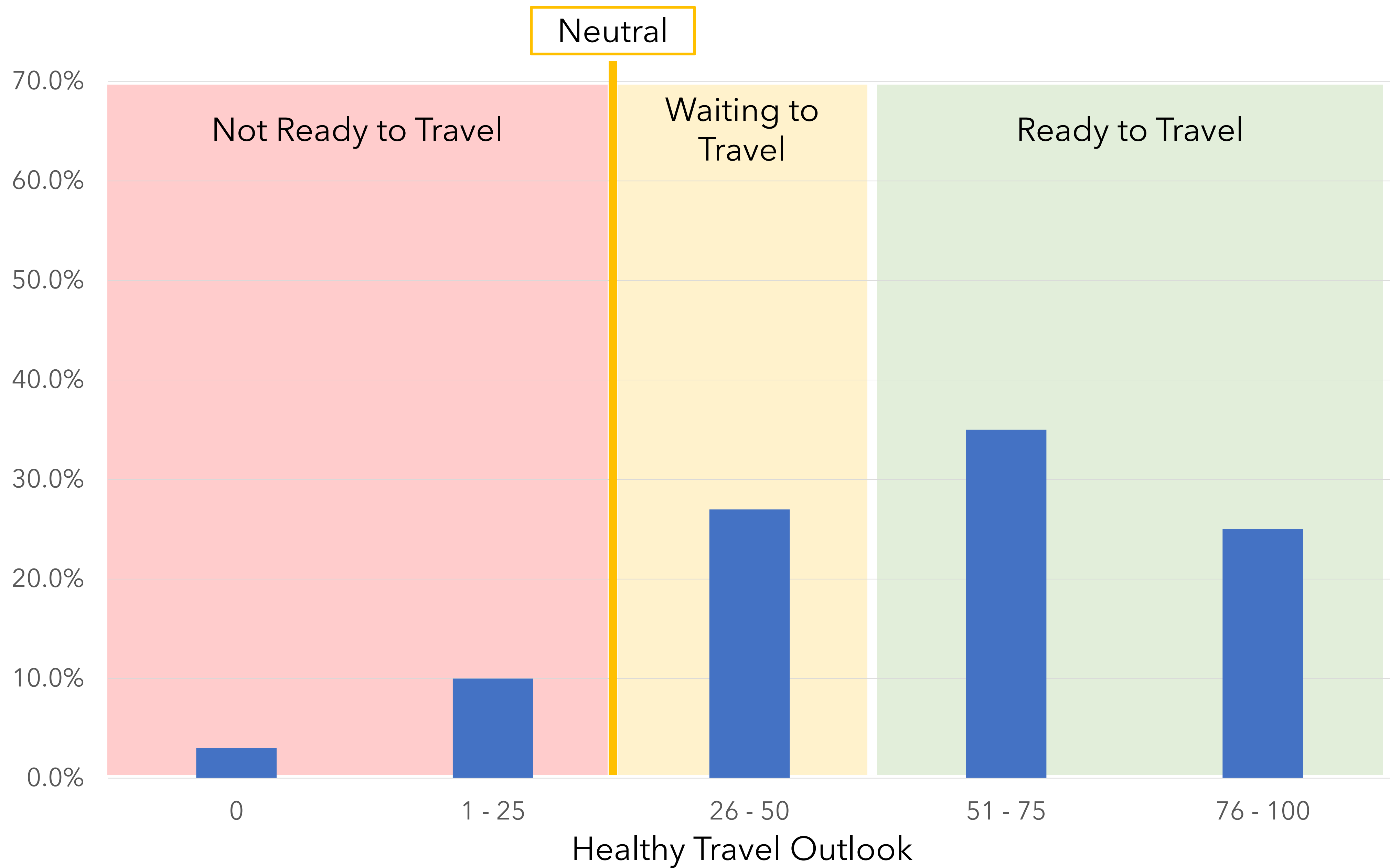
The goals are to identify:

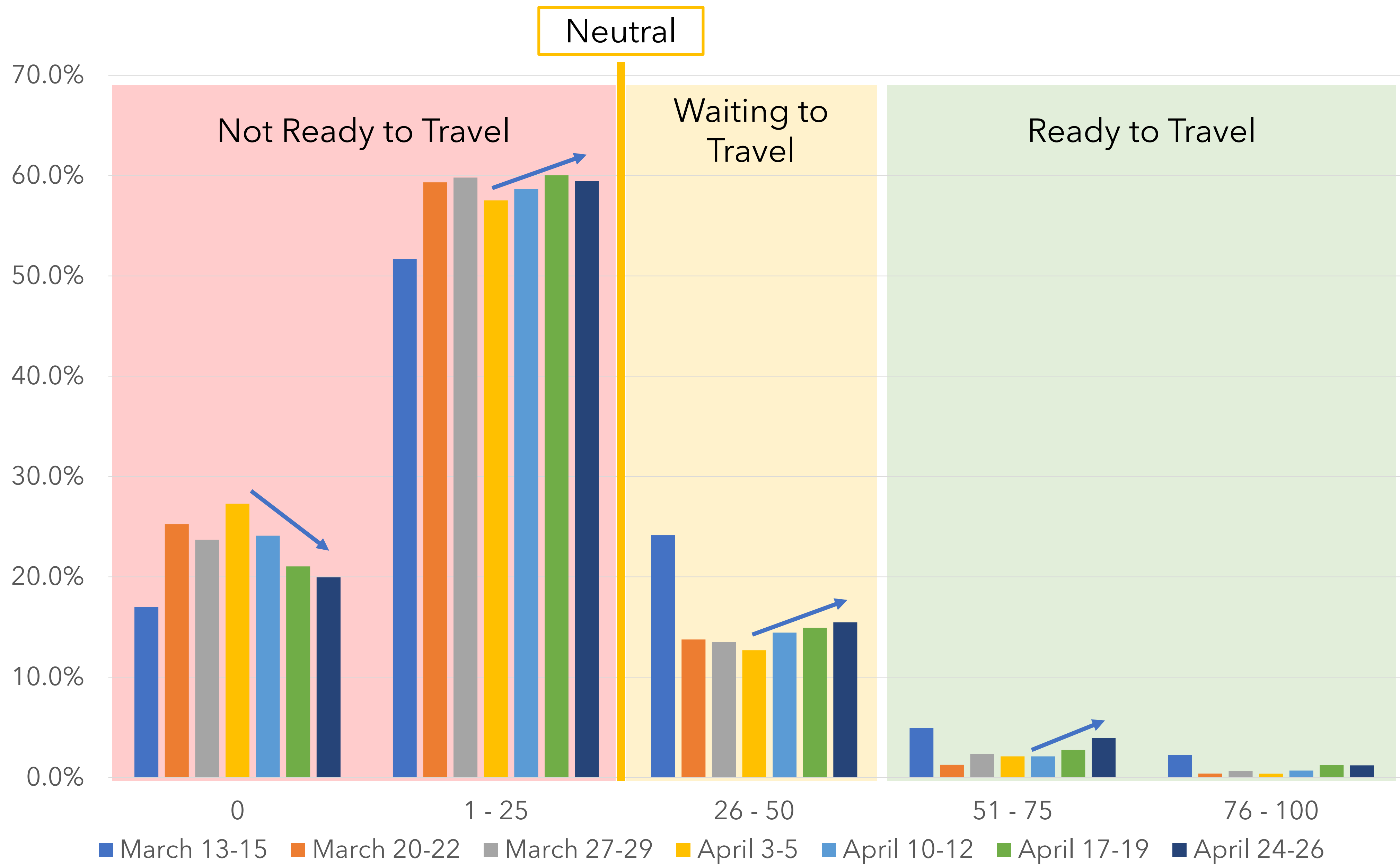
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

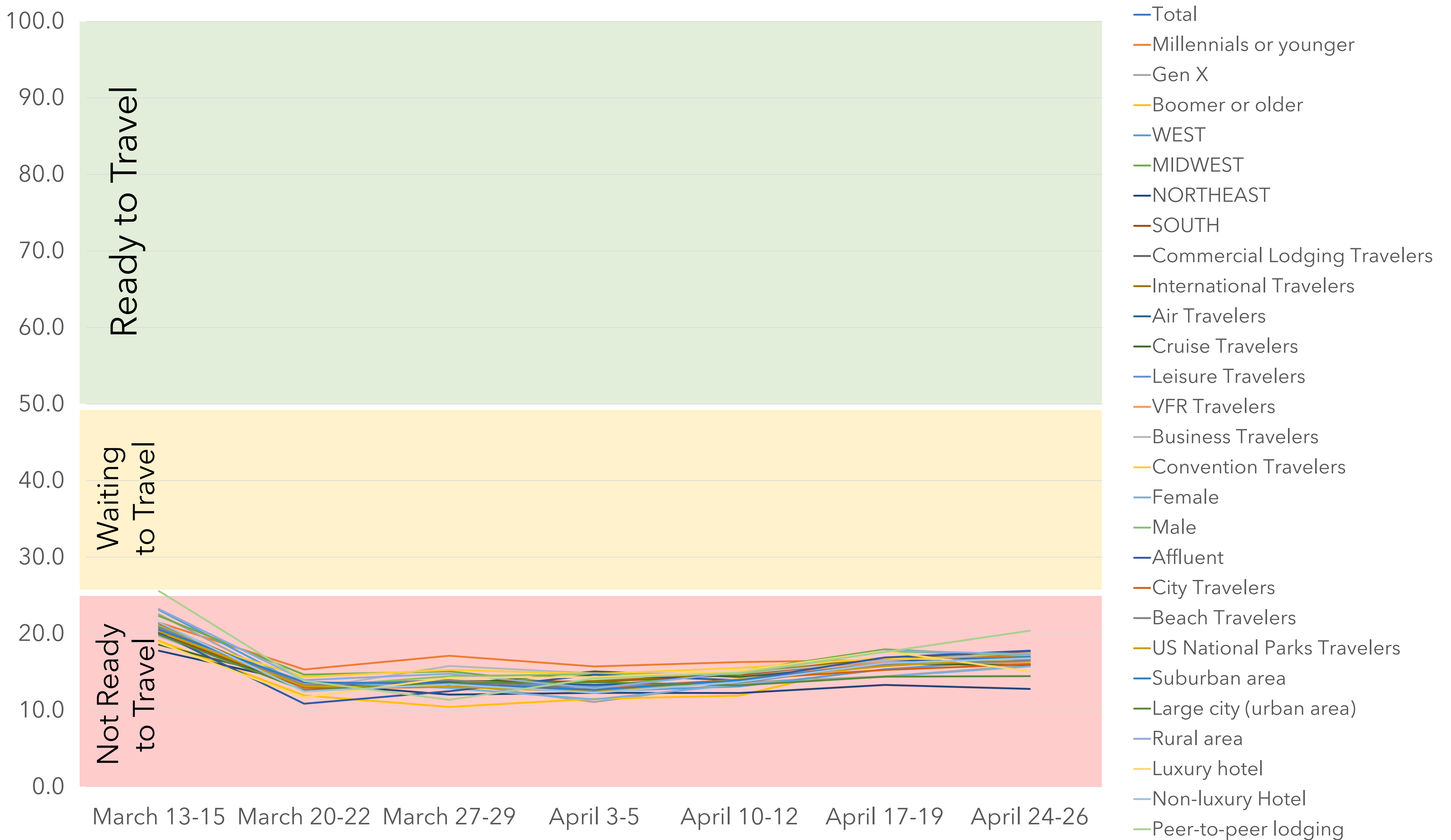
Predictive Index Formula



*Normalized to a 100-point scale



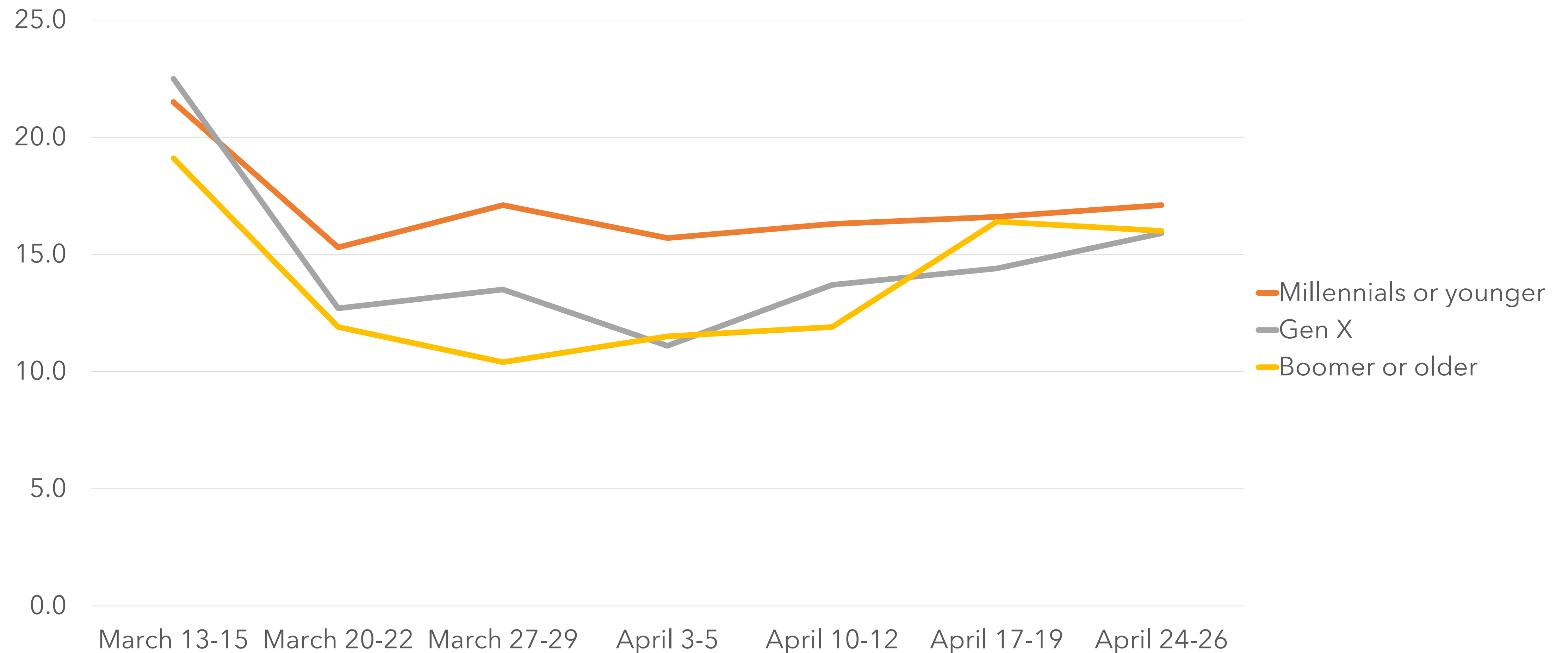




Generation

Points of Interest Impacting Index Scores:

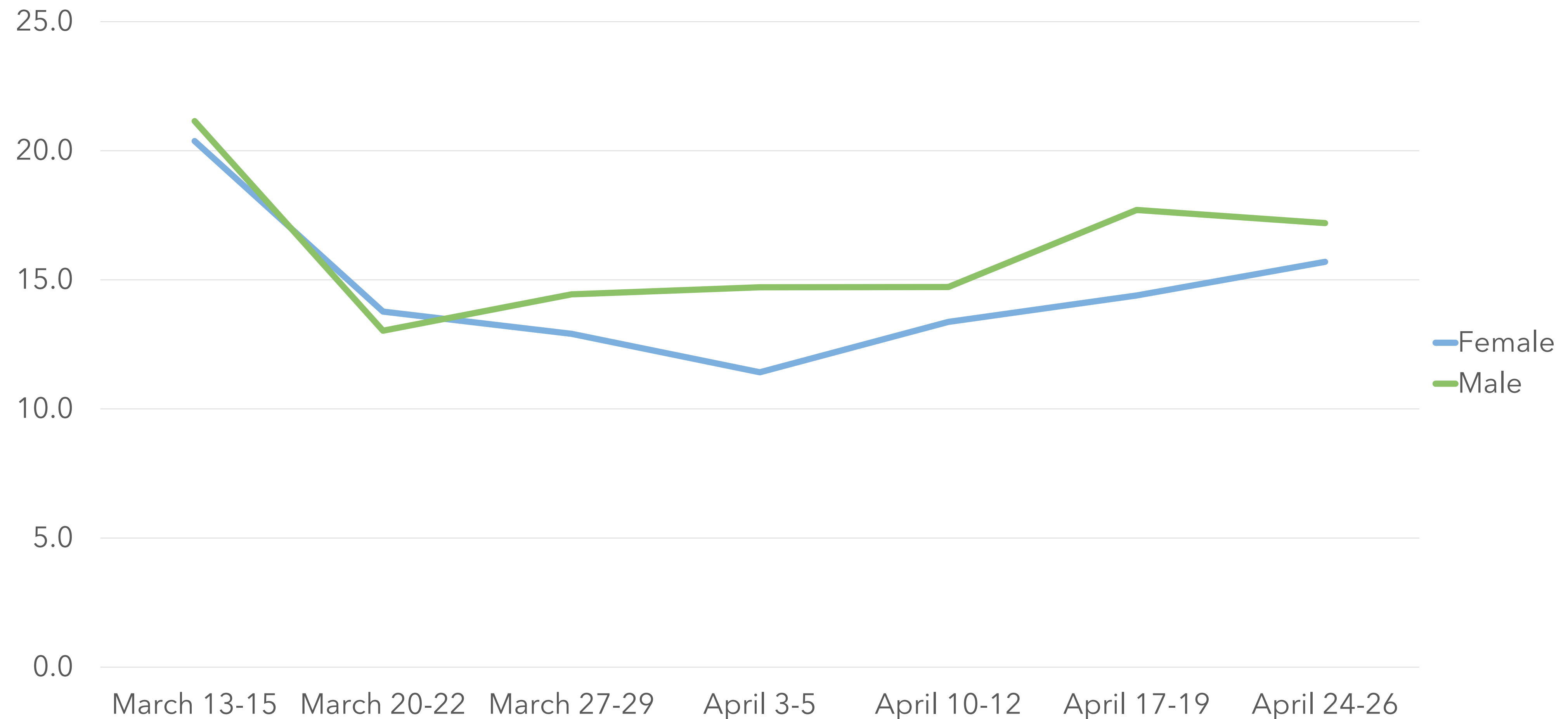
- For the first time in weeks, Gen X is NOT the most concerned personally for contracting the virus. Surprisingly Millennials are highest, Boomers lowest.
- Boomers this week showing rise in levels of concern for the national economy this week.
- All generations show similar agreement about traveling in Fall 2020, but Millennials show slightly more optimism about Summer travel than older generations.



Gender

Points of Interest Impacting Index Scores:

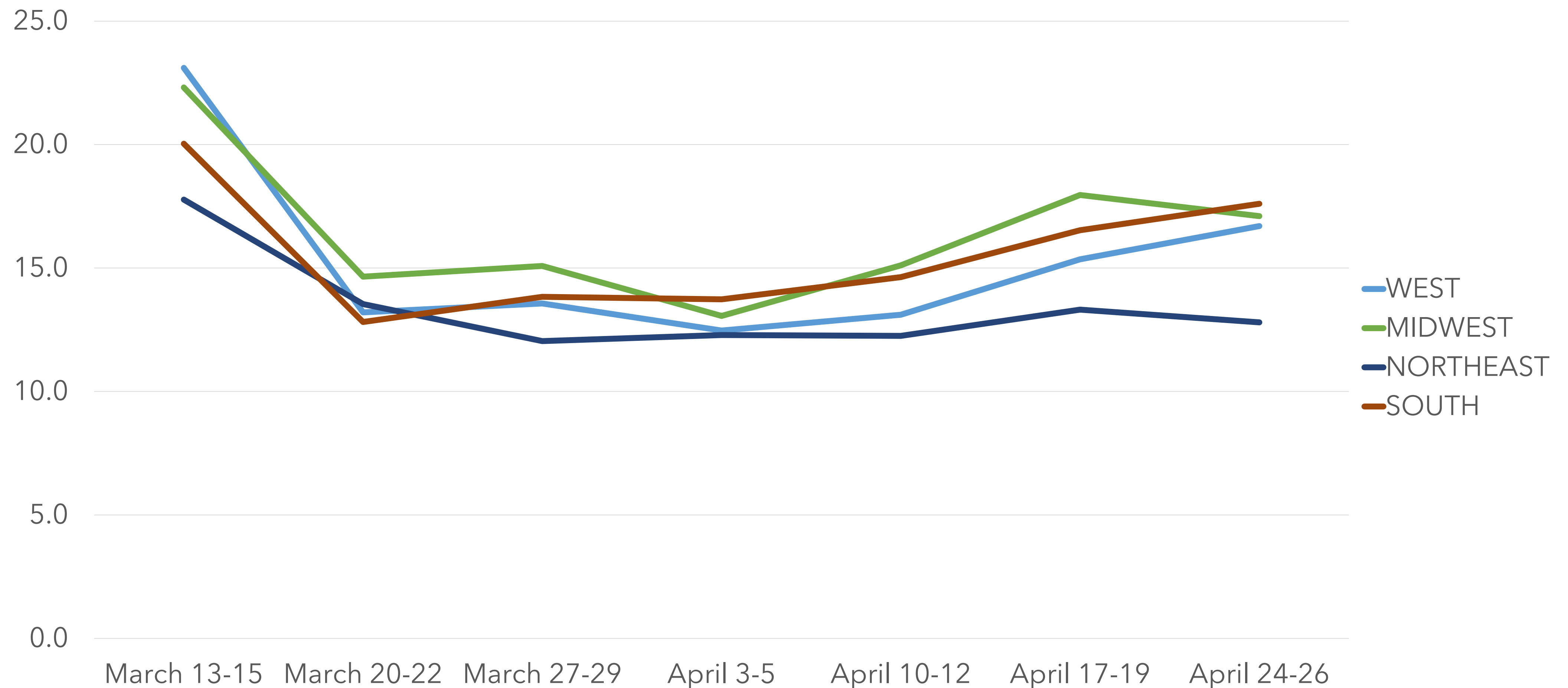
- Men and Women reported similar levels of both safety and financial concerns this week (previously women showing more concern).
- Men, however, continue to show more excitement to travel now and more openness to travel messaging.
- Women more likely to say they will avoid crowded destinations (60.3% vs. 46.6% for men) after COVID-19.



US Region

Points of Interest Impacting Index Scores:

- Northeast reported the highest levels of personal concern for contracting the virus again this week, consistently higher than other regions.
- South showed the most excitement to travel now and the most openness to travel messaging.
- Midwest shifted back to being the least optimistic this week, being the least likely to say the Coronavirus situation will get better or much better in the next month, South is the most optimistic.





Questions?
Need More
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/>