



Coronavirus Travel Sentiment Index

Report of Findings—Week of April 6th

Destination  Analysts



IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or 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
so much to our clients and partners who have

TODAY

Overview of Findings

Travel Marketing
Potential Influence Index

Update from the Meetings
Industry: Meeting Planner
Panel

Discussion + Questions



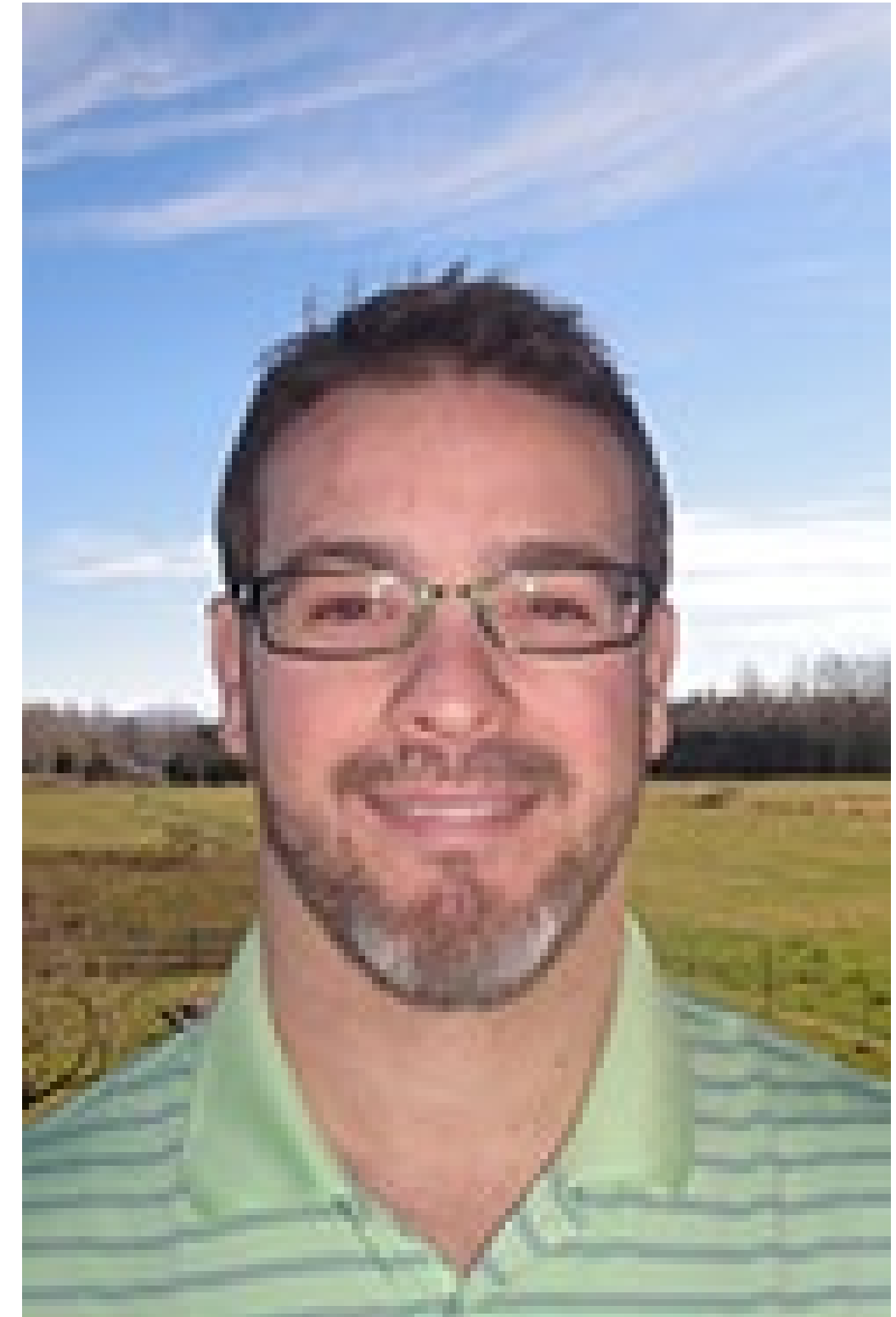
With Us



Cammie Bridges
Corporate Planner



Steve Collins
Third Party Planner



Cody Short
Corporate Planner



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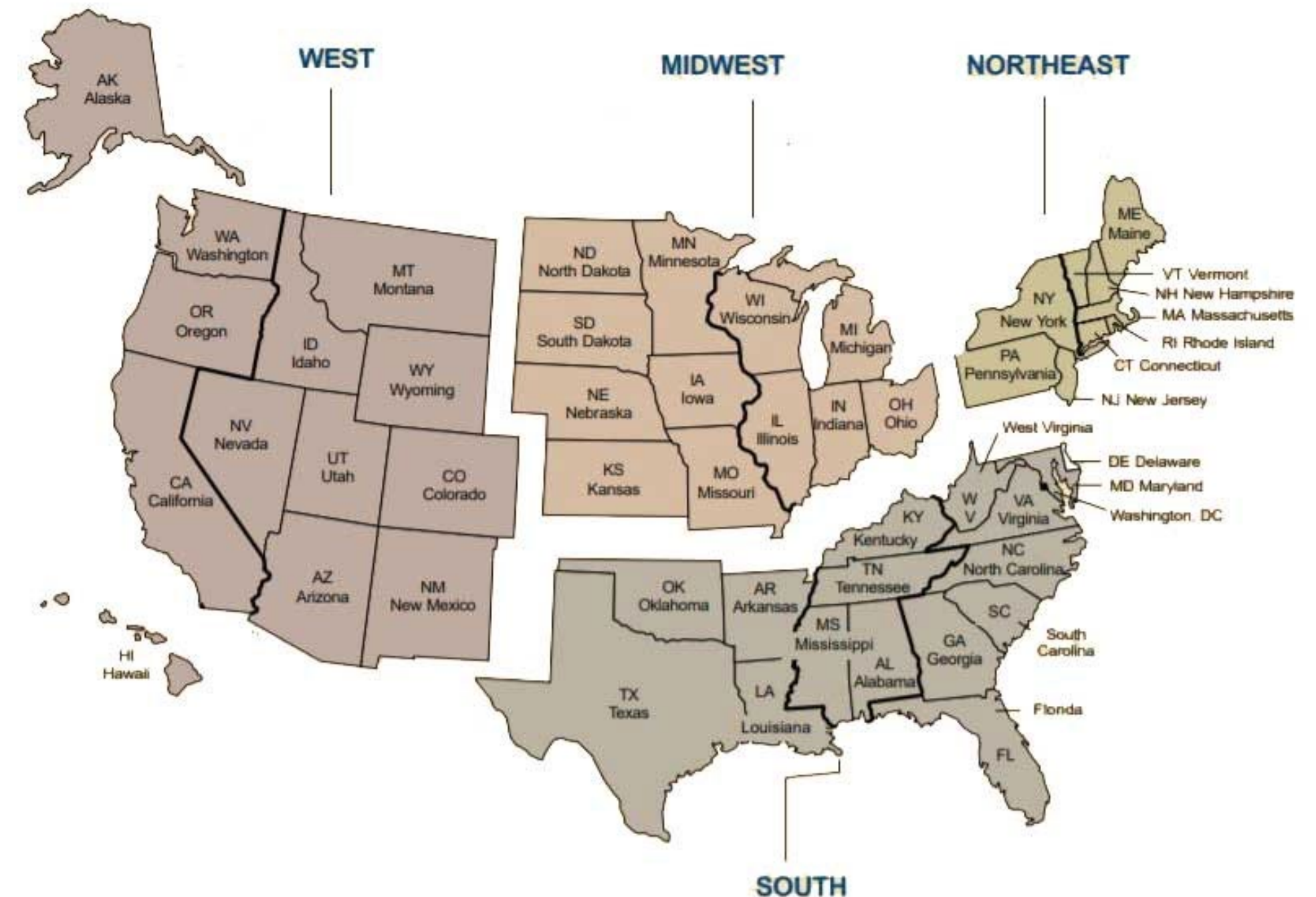
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Project Overview & Methodology

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 4 data (fielded April 3rd-5th) will be presented today**
- **1,200 fully completed surveys were collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

Map of U.S. Showing Survey Regions



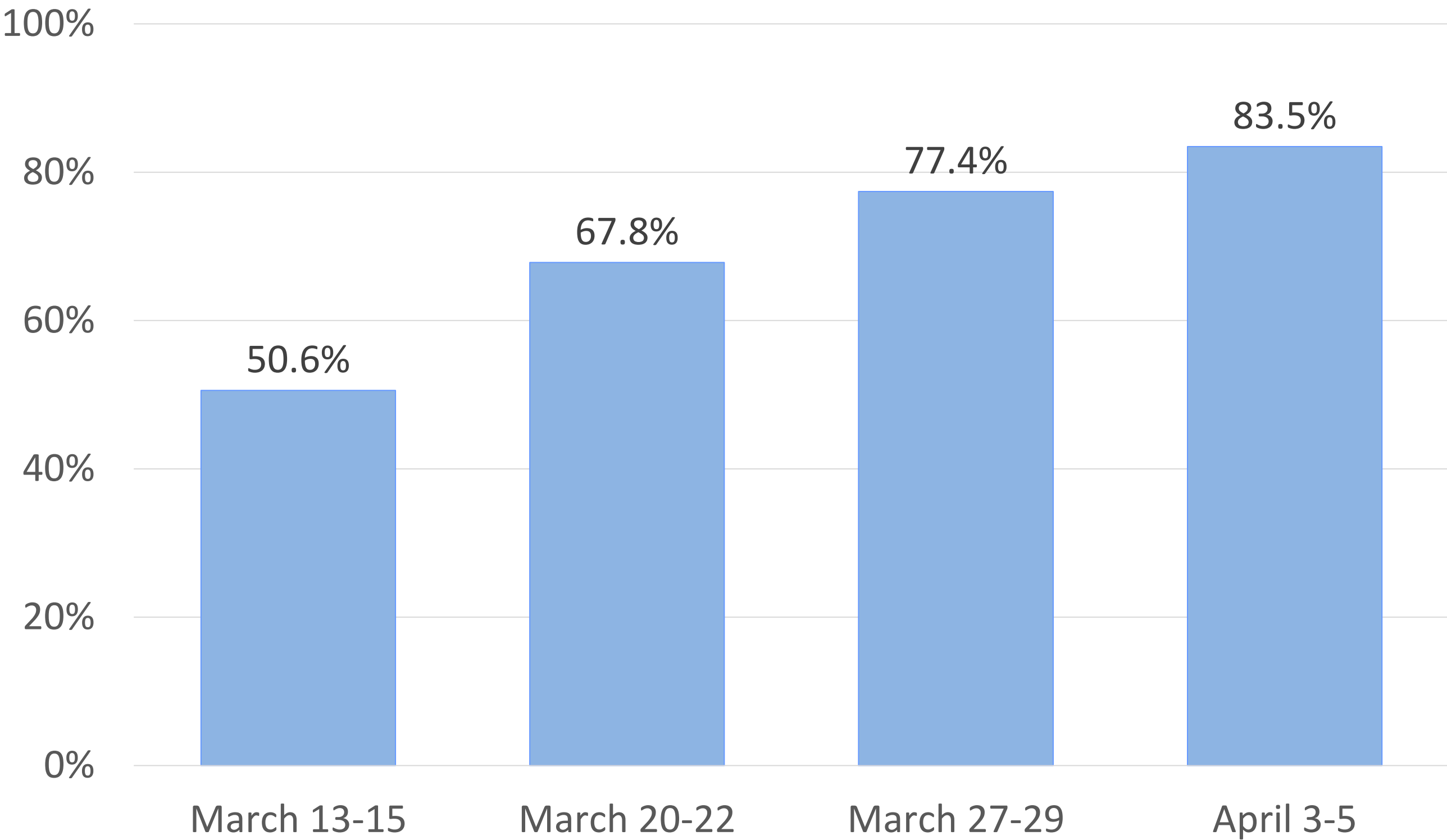
A woman and two children are walking through a brightly lit shopping mall. The woman, on the right, is wearing a blue sleeveless top and a white skirt with a colorful scalloped pattern. She is holding the hand of a young boy in the middle. The boy is wearing a blue and white striped t-shirt and white shorts. To his left is a young girl wearing a blue short-sleeved top and a white lace skirt. All three are wearing face masks. The background is filled with blurred lights and festive decorations, suggesting a holiday season. The text "Personal Concerns" is overlaid in the center of the image.

Personal Concerns

Lives in a Place with Reported Cases of Coronavirus

Question: Do you live in an area with reported cases of coronavirus?

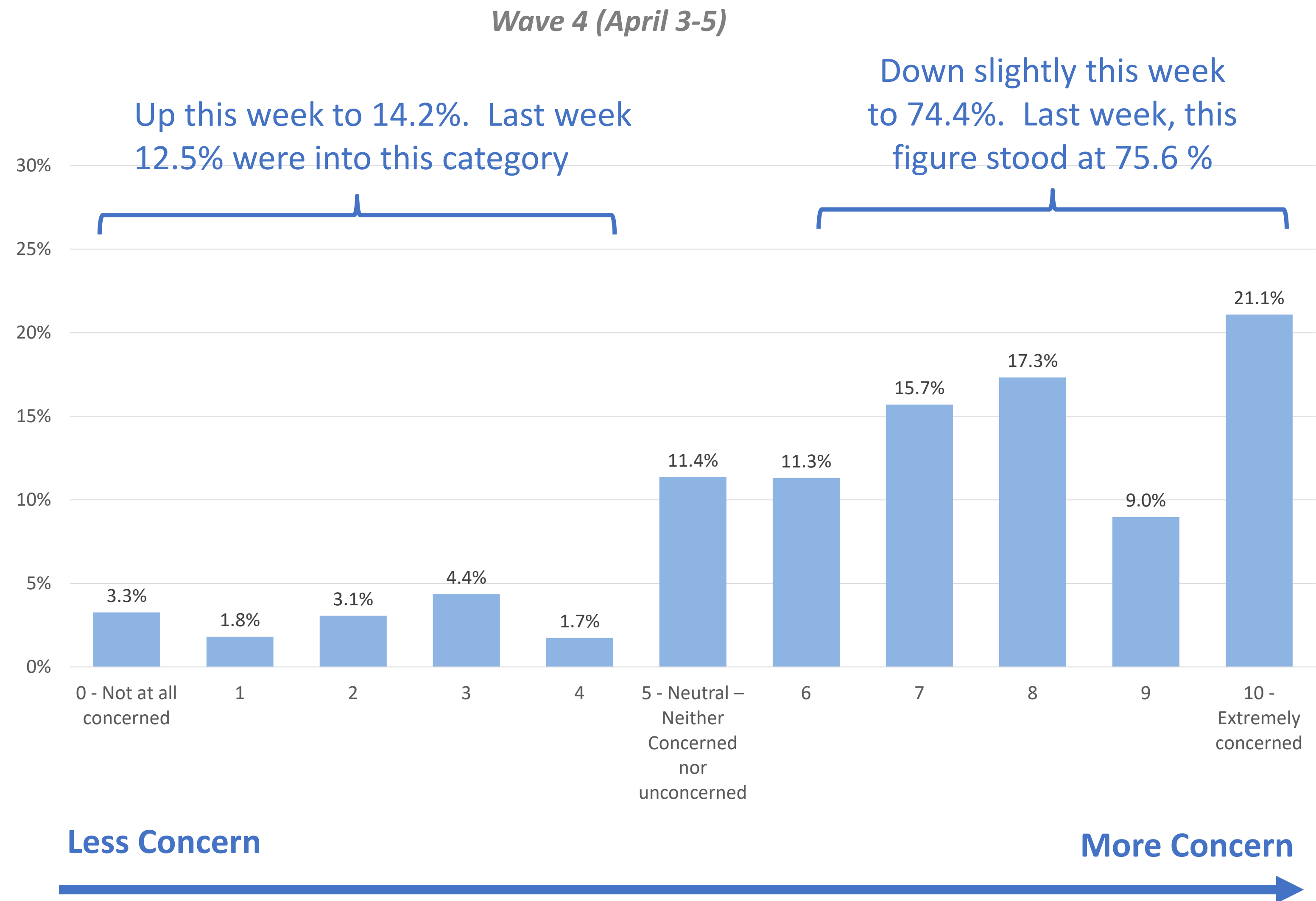
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)



Personal Health Concerns

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

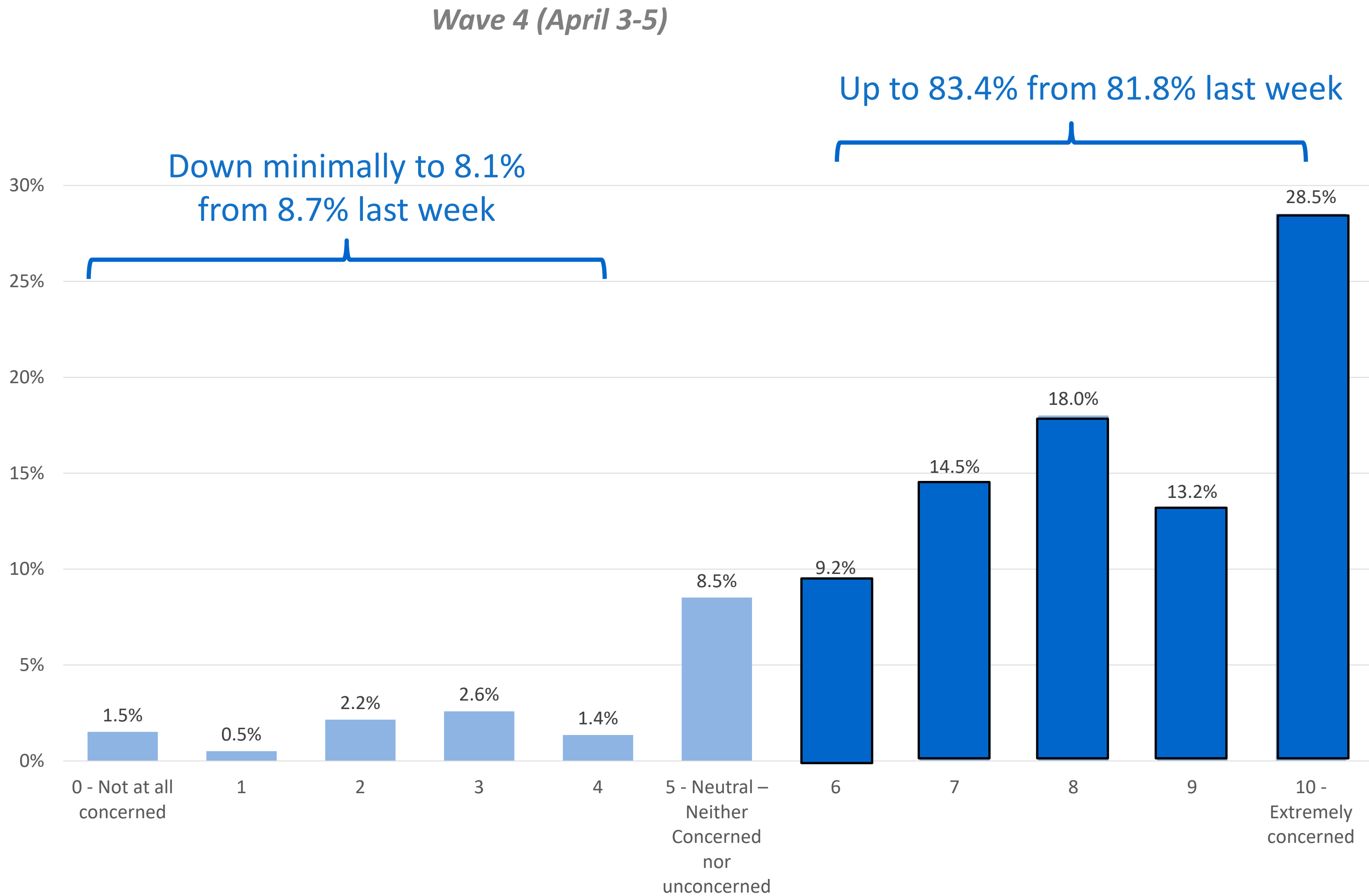
(Base: Wave 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



Health Concerns (Family & Friends)

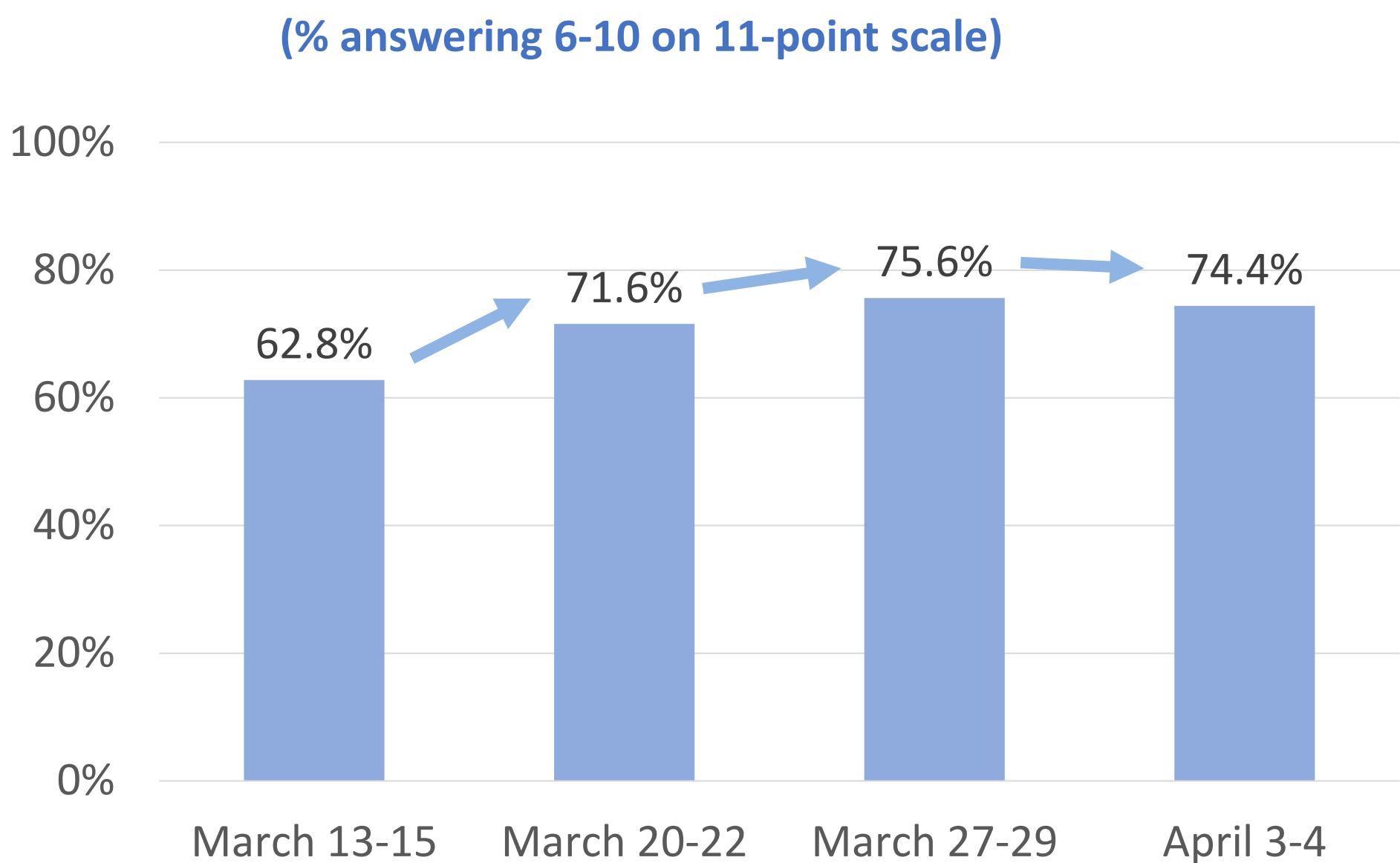
Question: Thinking about the current Coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



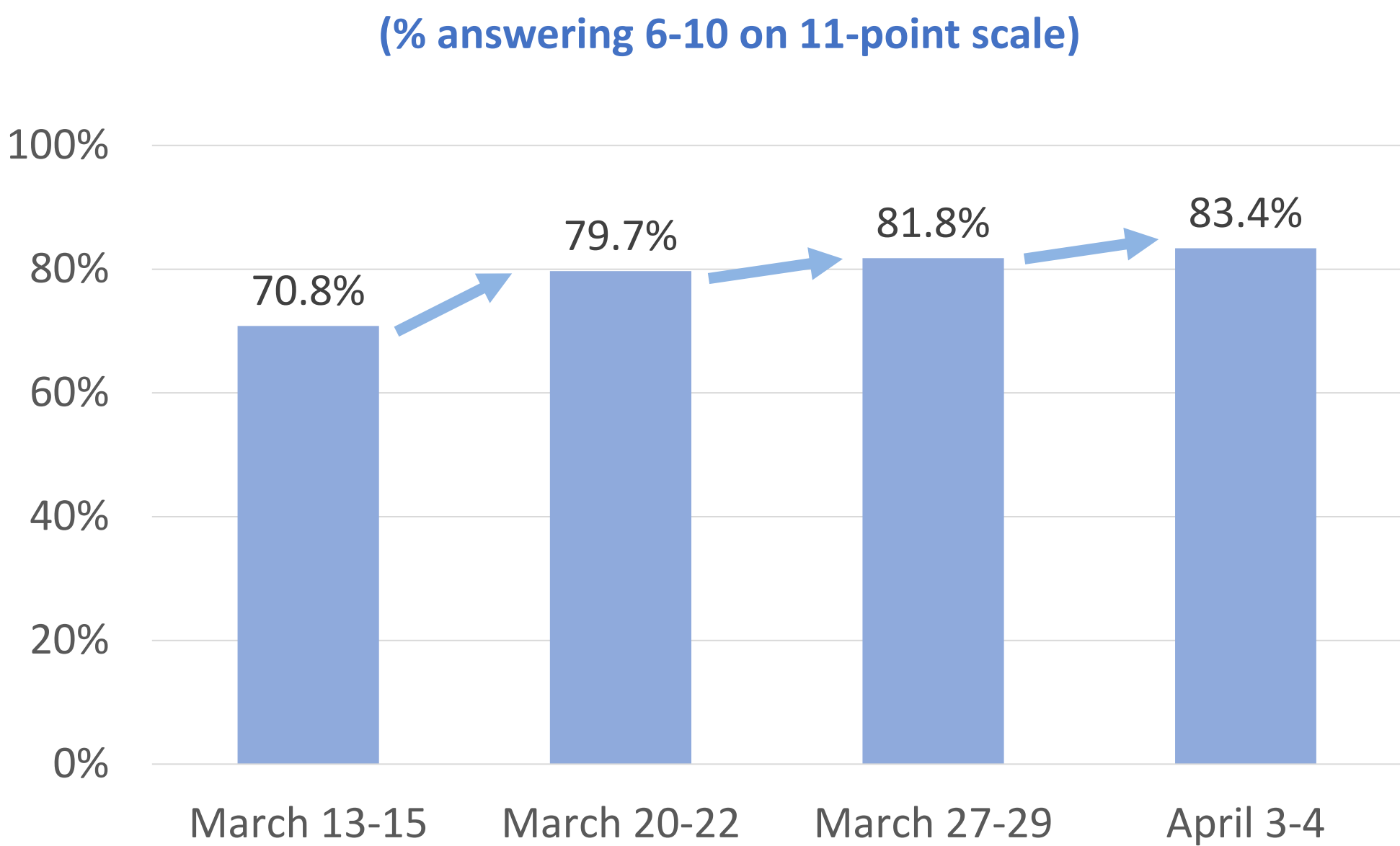
Summary: Safety Concern Metrics

Concern About Contracting Virus (Personally)



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

Concern About Loved Ones Contracting Virus

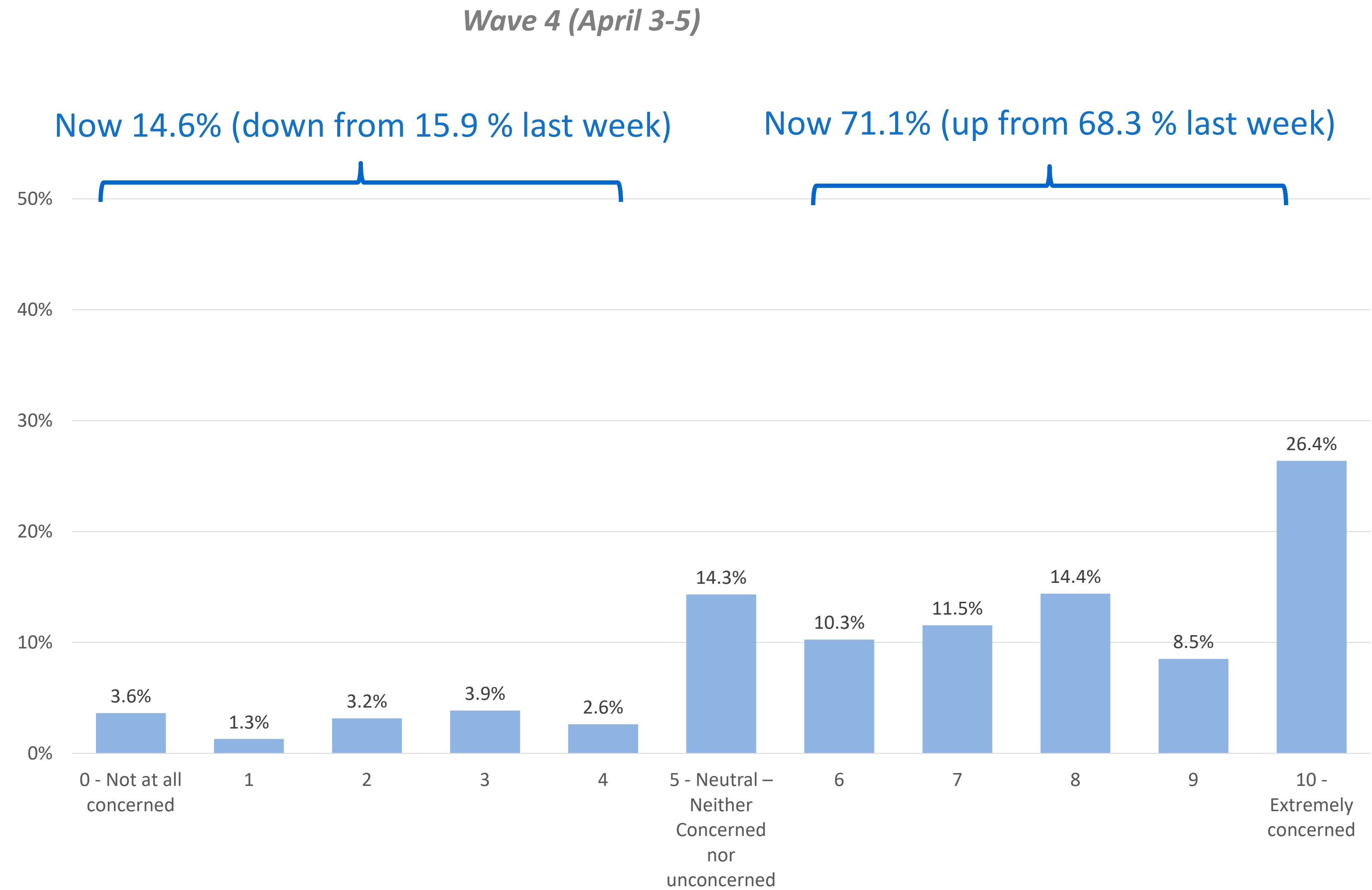


Question: Thinking about the current Coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

Concerns About Personal Finances

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)

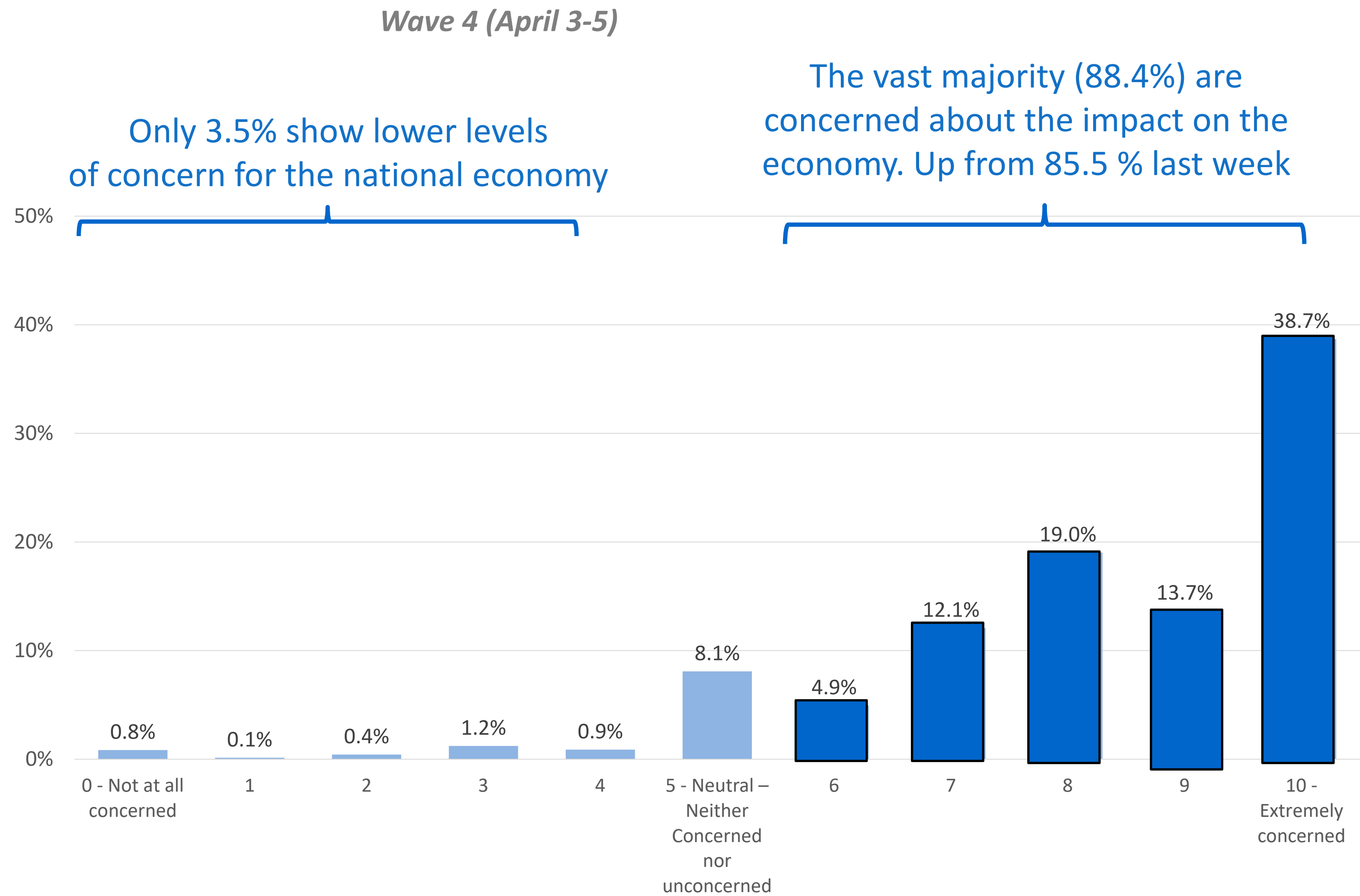
(Base: Wave 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



Concerns About National Economy

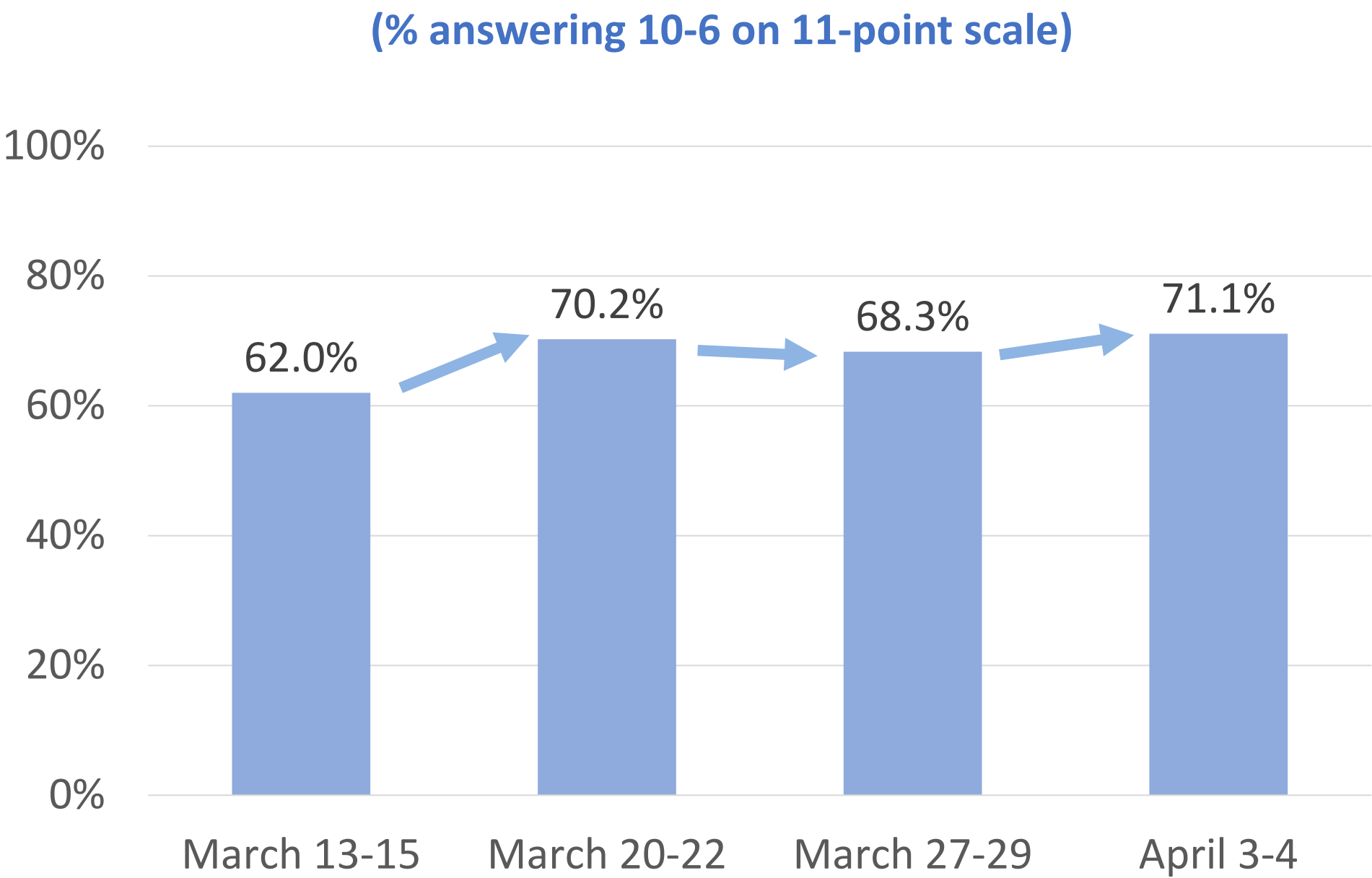
Question: Thinking about the current Coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 4 data. All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)



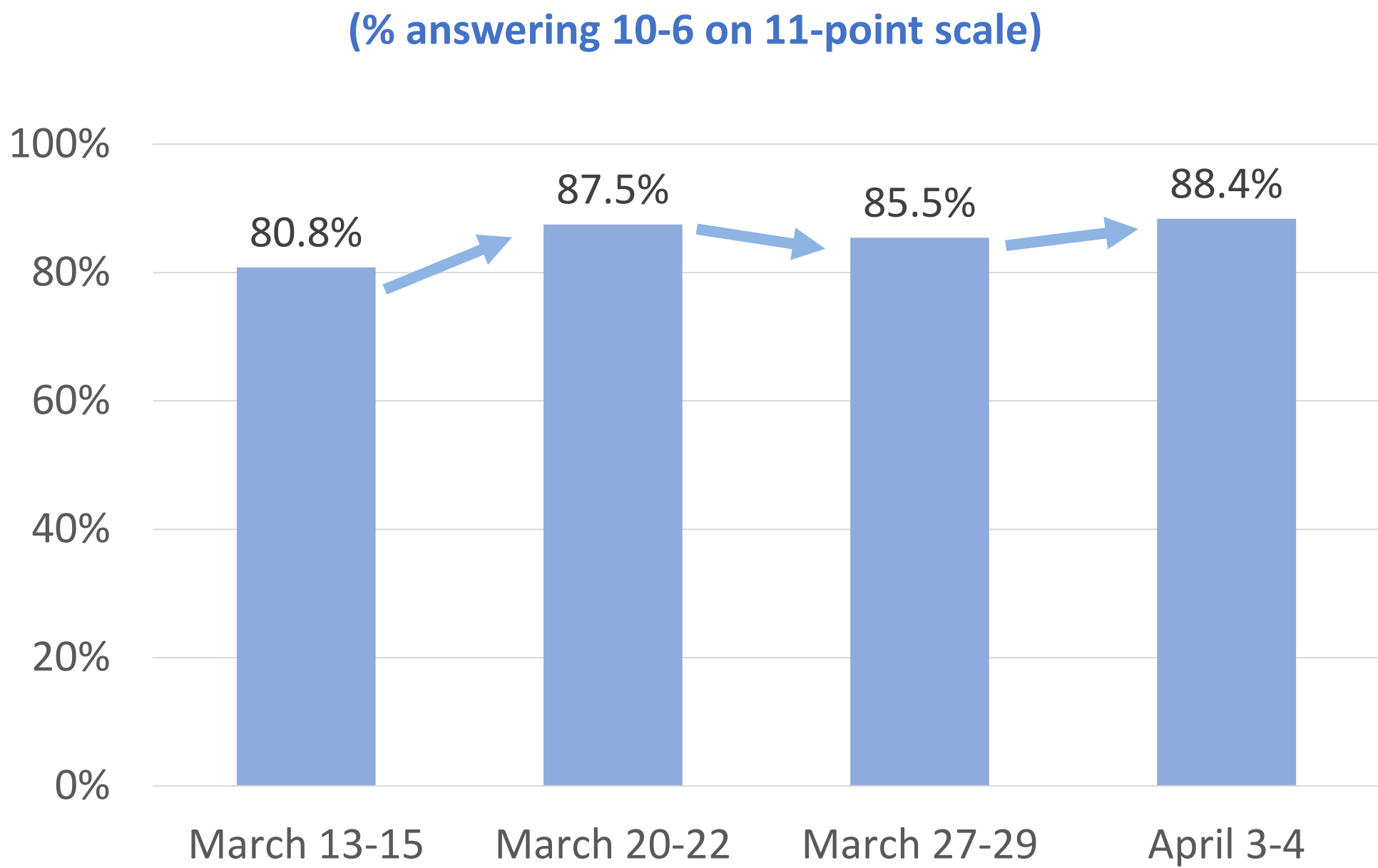
Summary: Economic Concern Metrics

Personal Finances



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)

National Economy



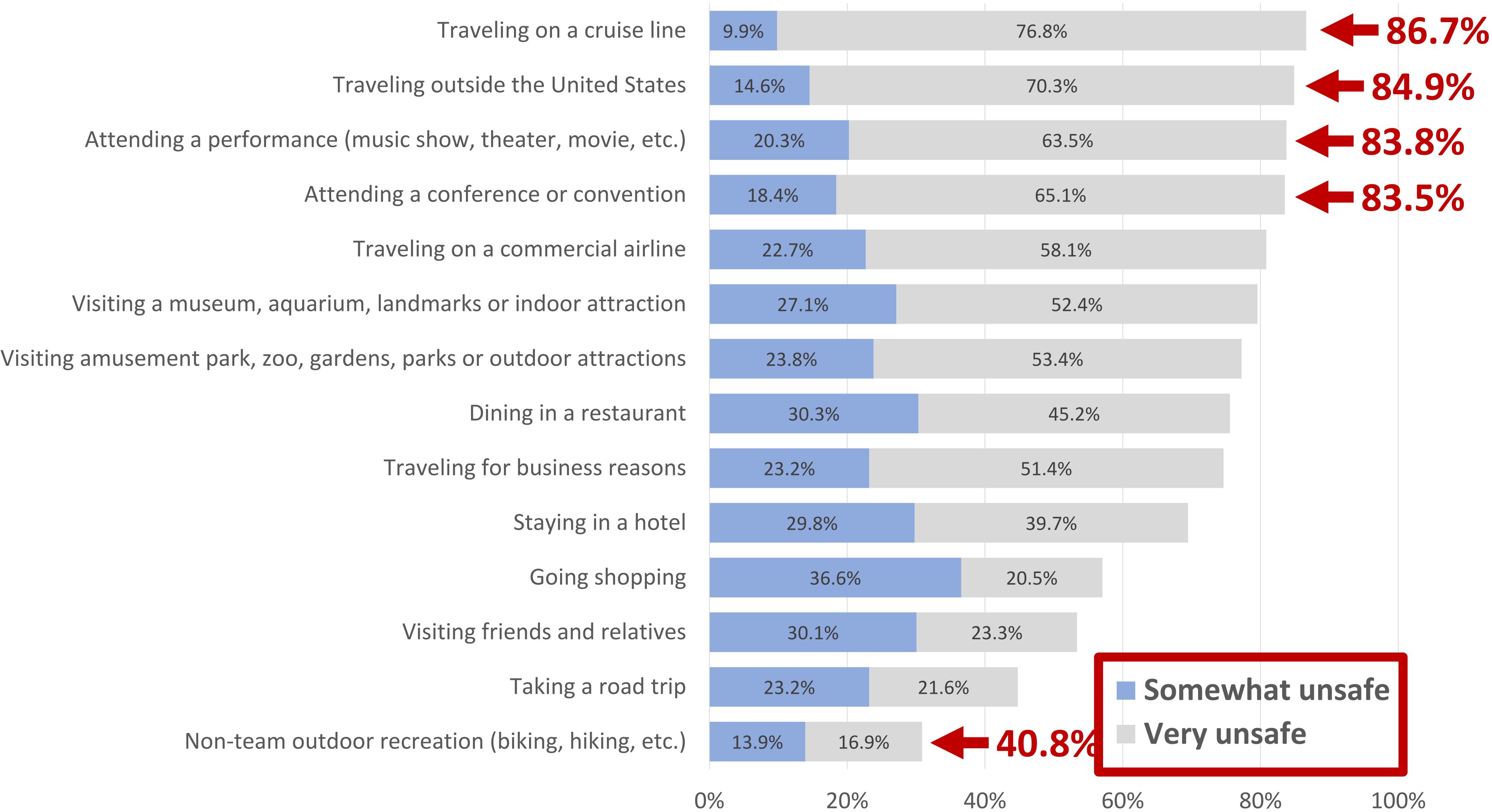
Question: Thinking about the current Coronavirus situation, how concerned are you about the impact it may have on the **NATIONAL ECONOMY**?

Perceived Safety of Travel Activities (Wave 3)

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

(Base: All respondents, 1,201 completed surveys. Data collected April 3-5, 2020)

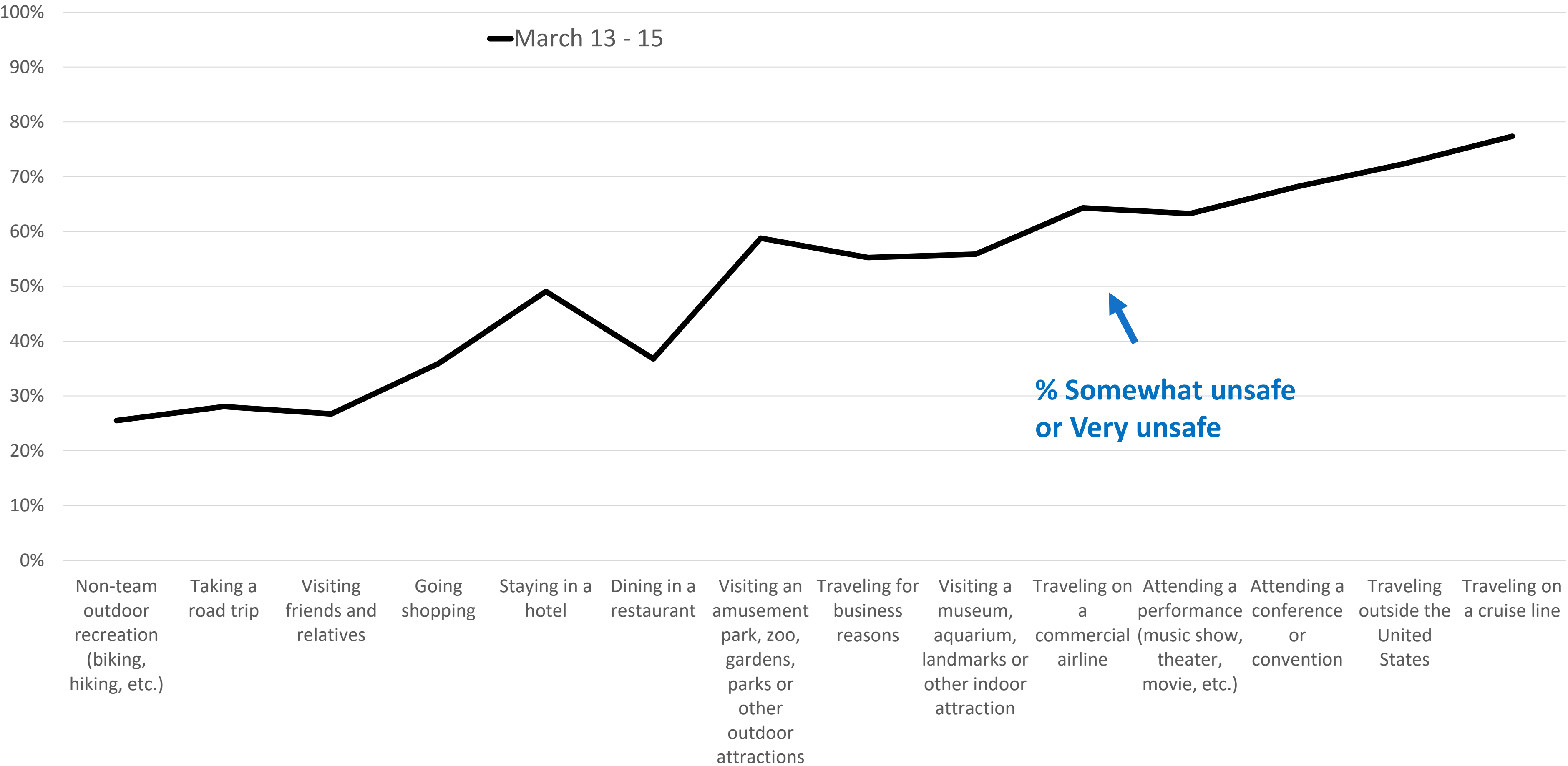
Wave 4 (Collected April 3-5)



Perceived Safety of Travel Activities (Wave 1)

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

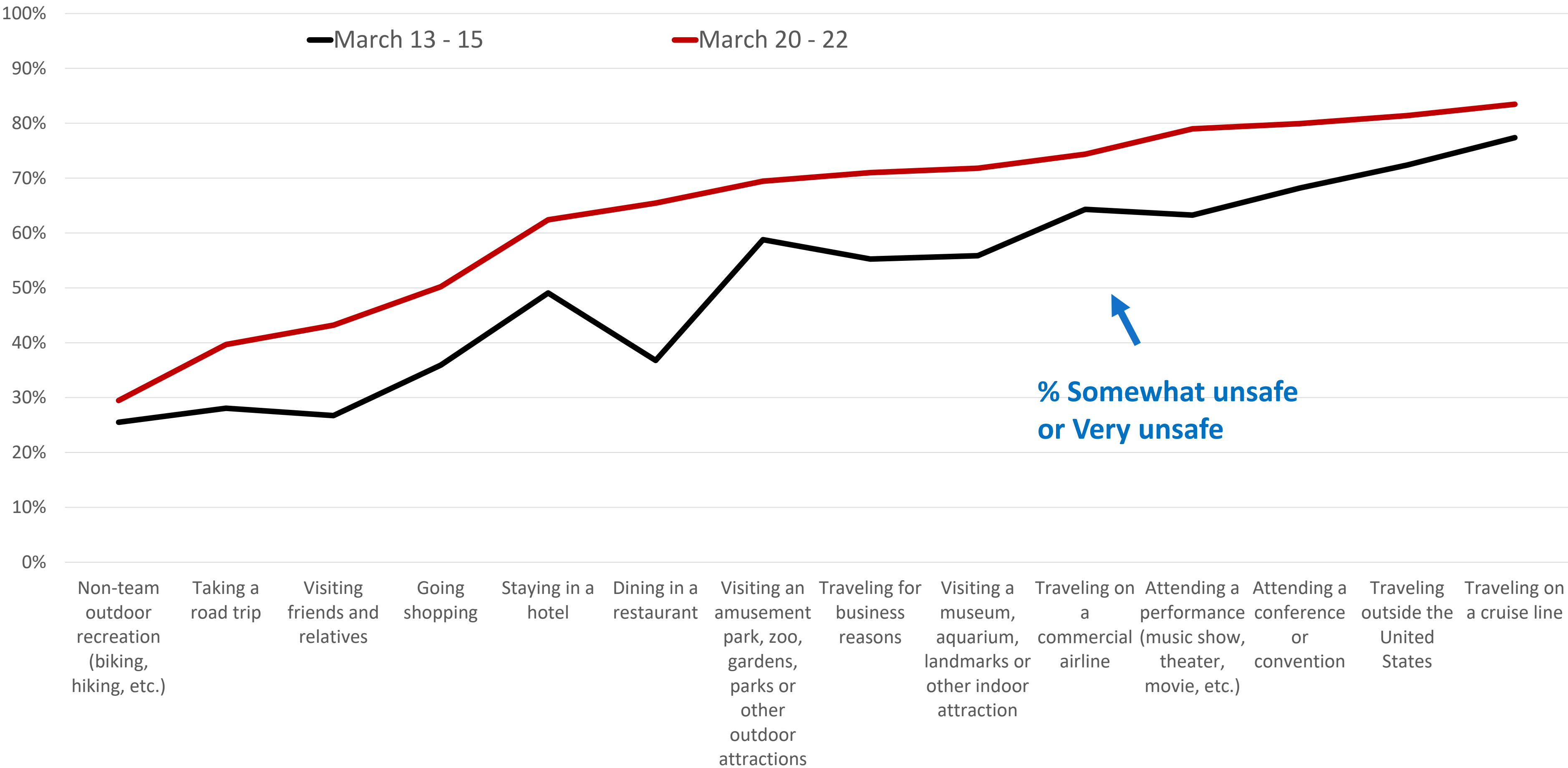
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-4)



Perceived Safety of Travel Activities (Wave 1 & 2)

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

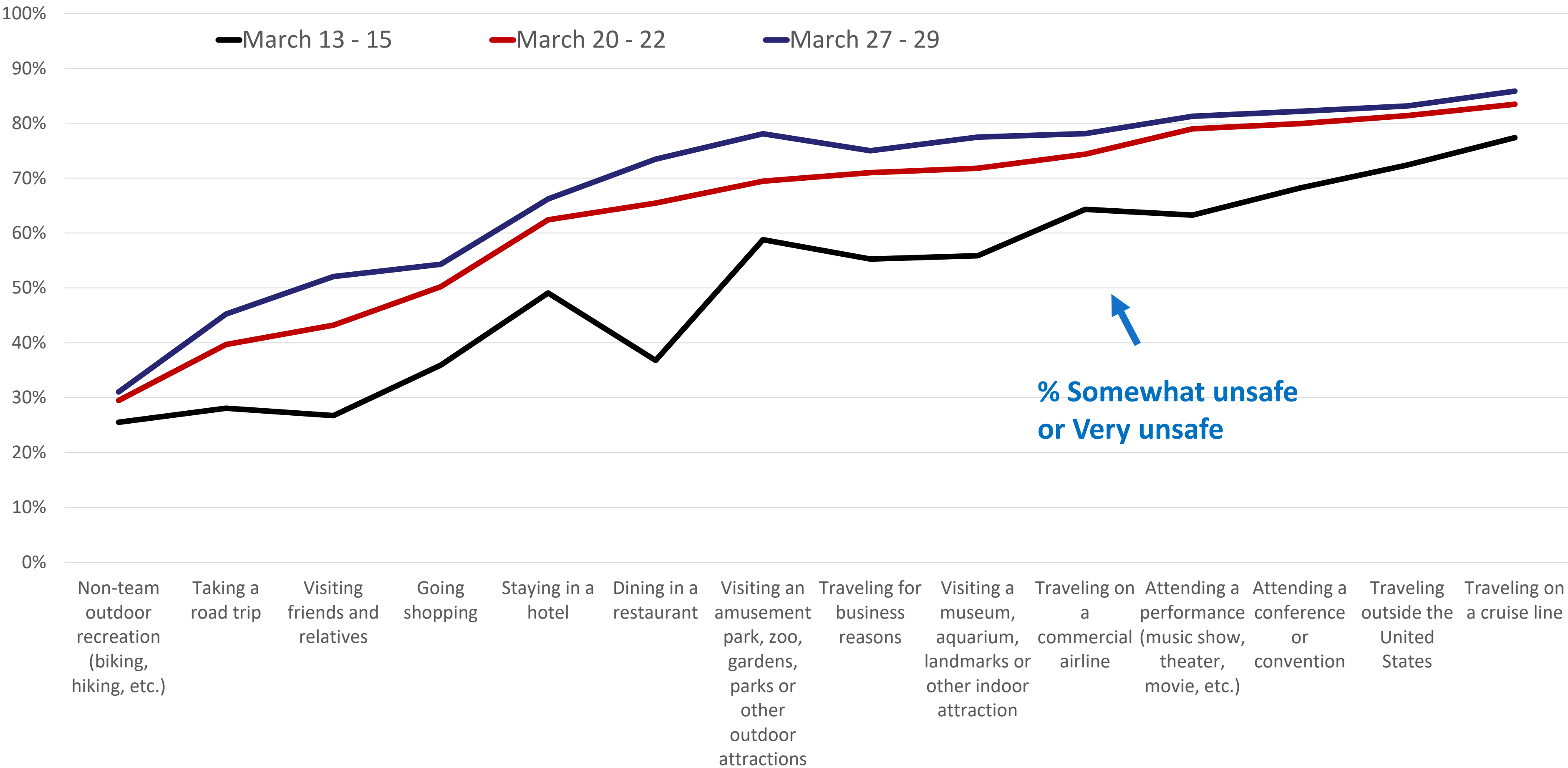
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-4)



Perceived Safety of Travel Activities (Wave 1, 2 & 3)

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

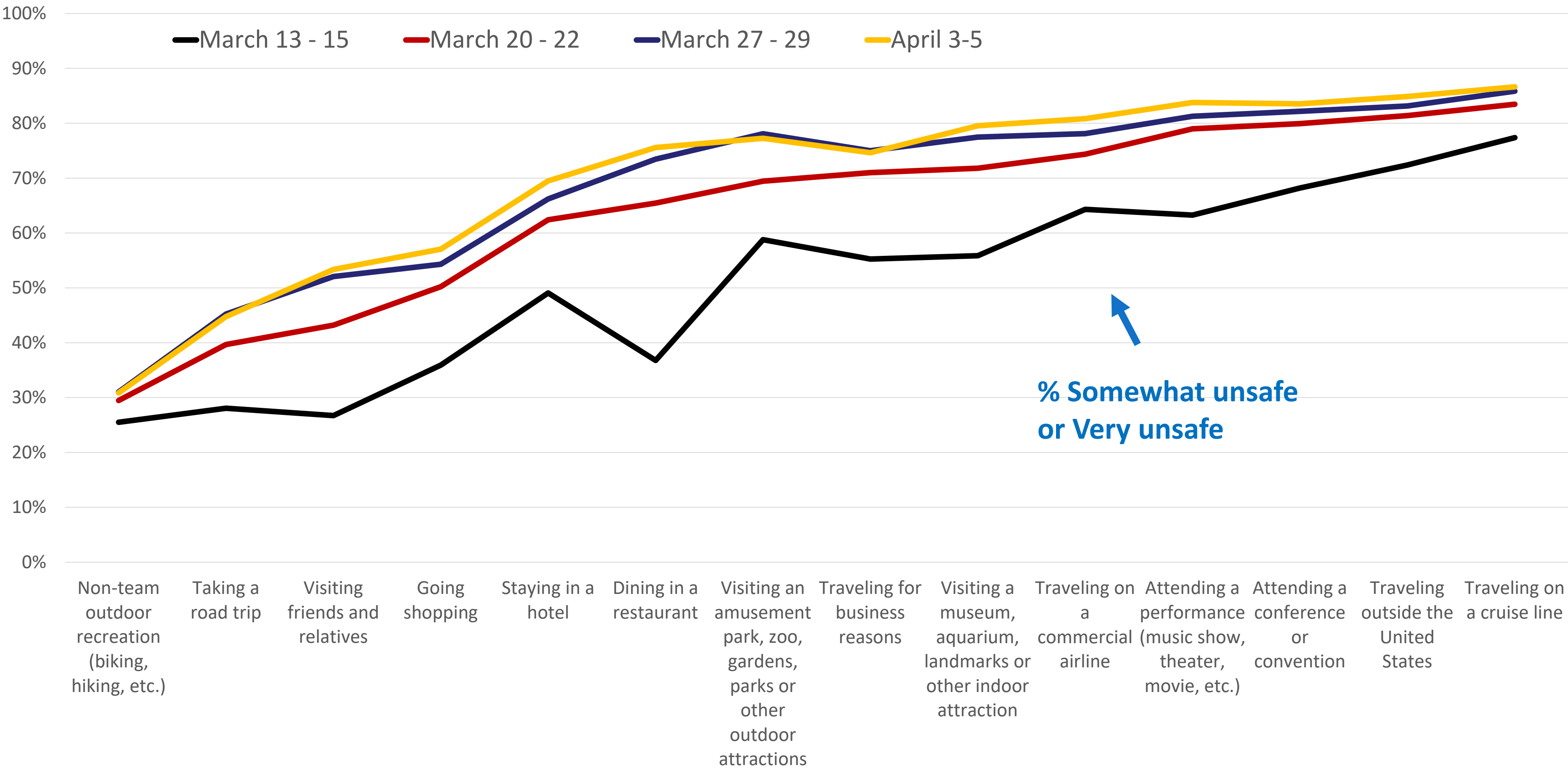
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-4)



Perceived Safety of Travel Activities (Wave 1,2,3 & 4)

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

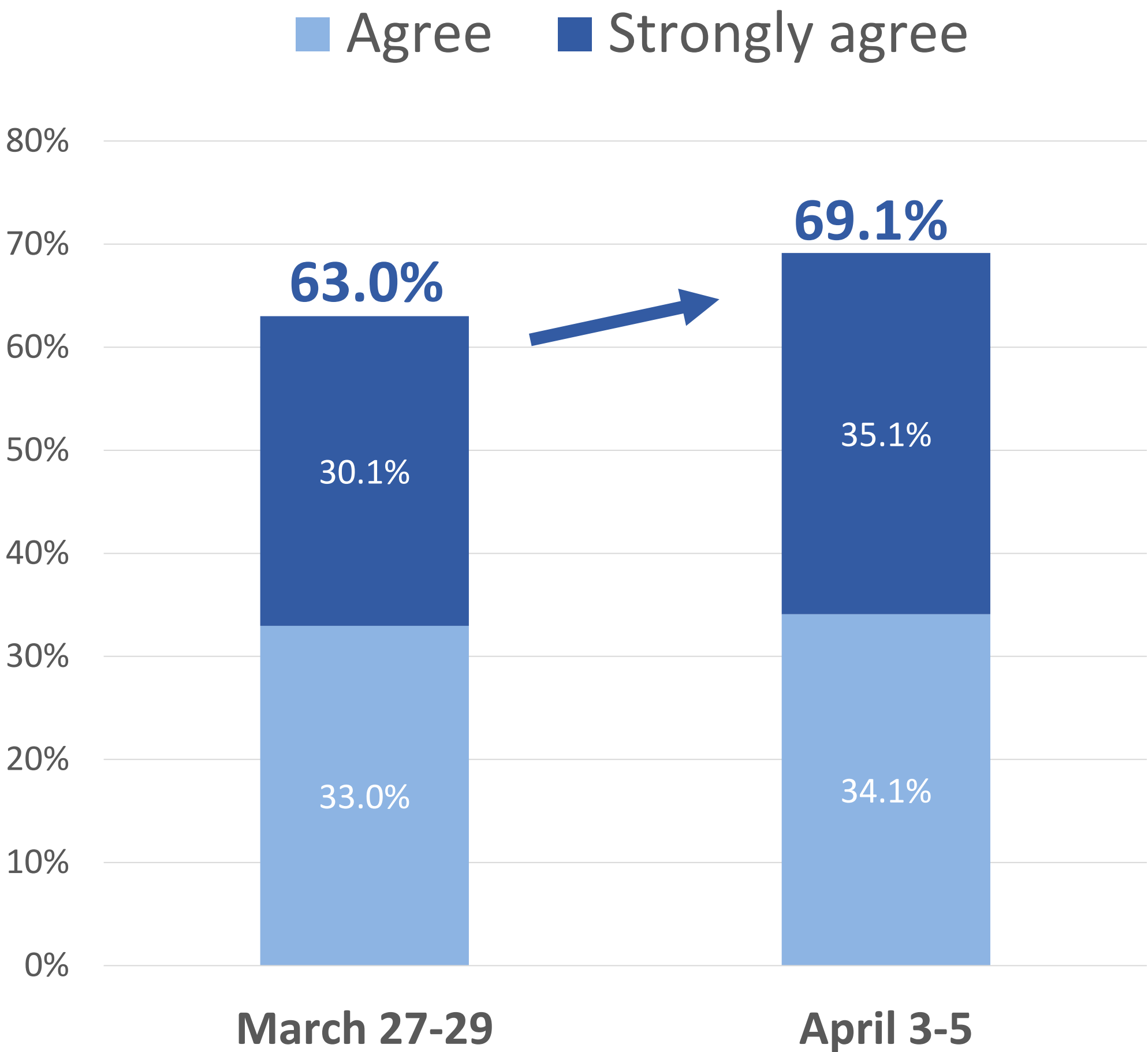
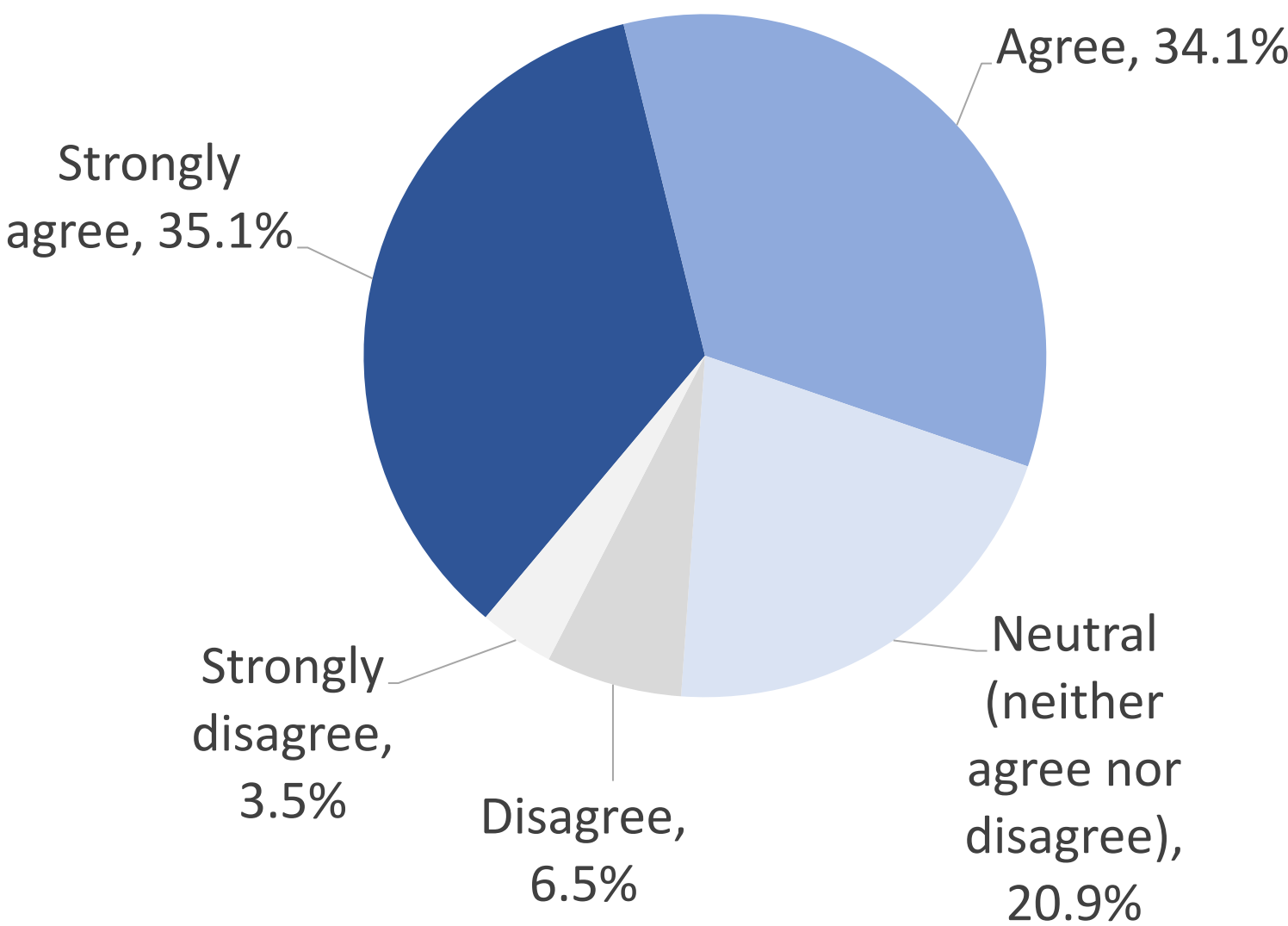
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-4)



Excited to Get Back to Traveling

How much do you agree with the following statement?

Question: I miss traveling. I can't wait to get out and travel again.



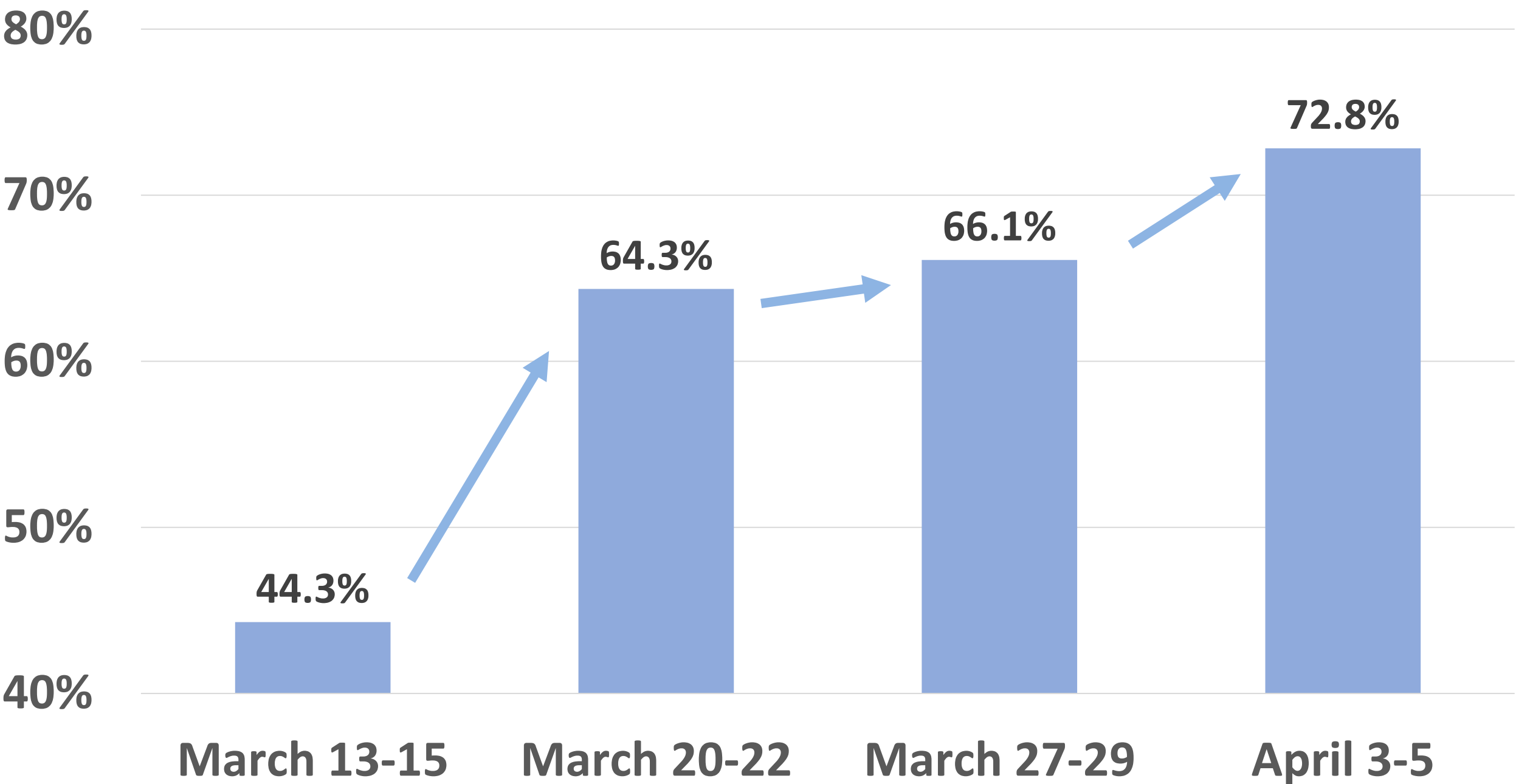
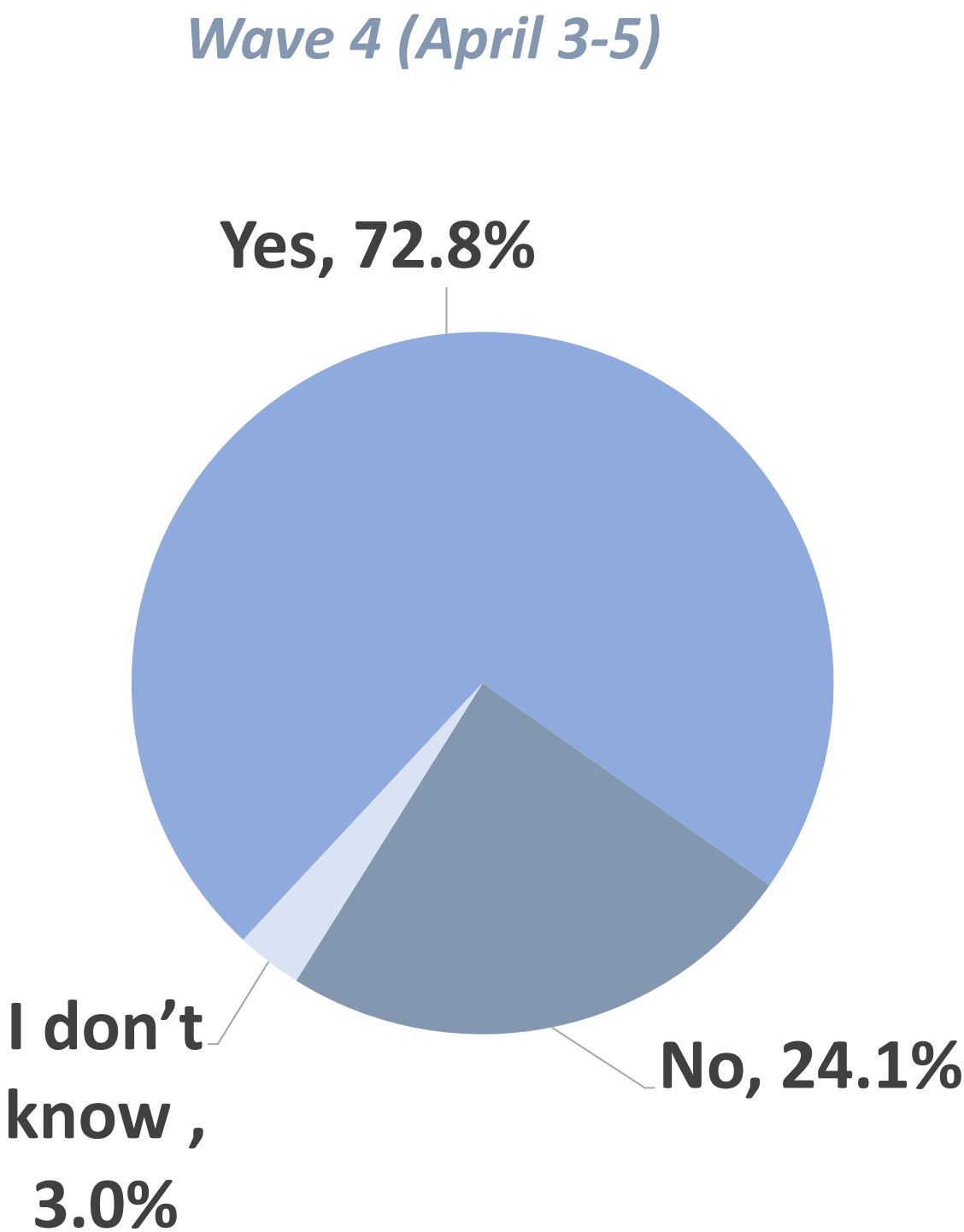
(Base: All respondents, 1,201 and 1,216 completed surveys. Data collected March 27-29 and April 3-5)

The image shows a wide-angle view of an empty airport security checkpoint. In the foreground, a series of blue retractable belt stanchions are arranged in a line, creating a queue area. The floor is a dark, polished material that reflects the overhead lights and the structure of the terminal. In the background, there are several security screening stations, each equipped with a large, glowing blue monitor. The ceiling is high and features a complex, geometric steel truss structure. Large windows on the right side of the frame allow natural light to enter the space. The overall atmosphere is quiet and deserted, suggesting a time of low passenger volume or a temporary closure.

Impact on Travel Behaviors

Impact of the Coronavirus on Travel

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

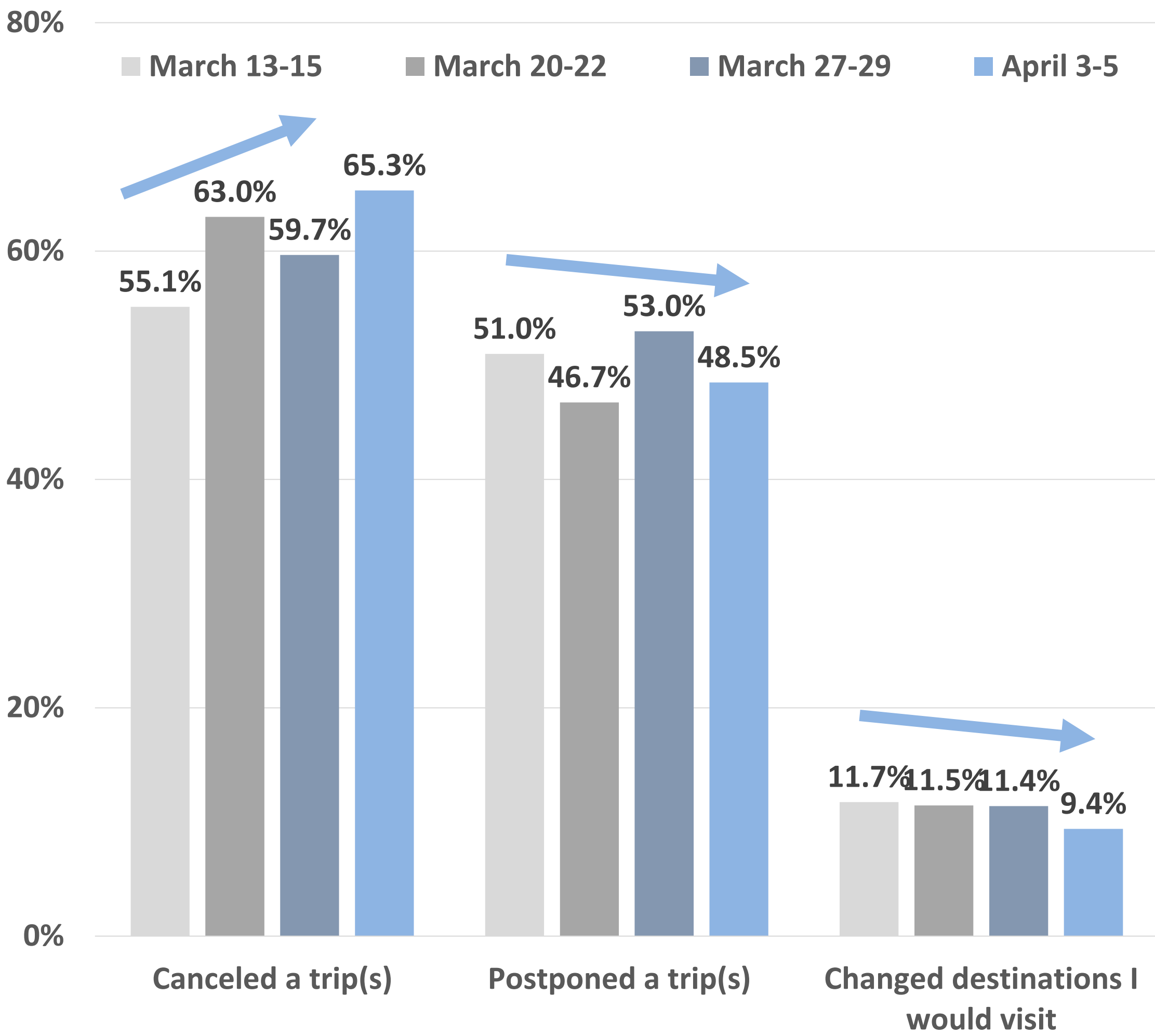
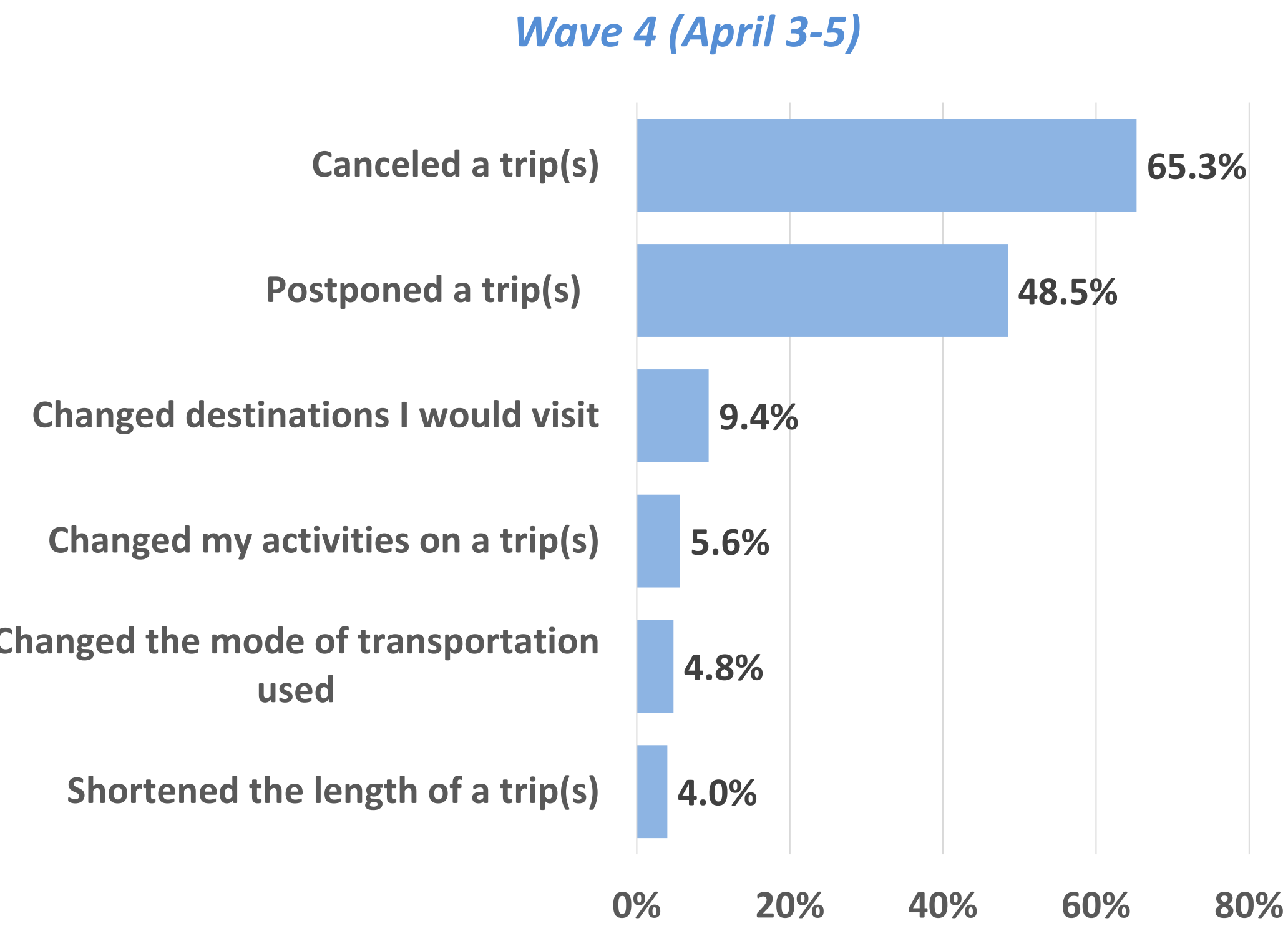


(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5)

How the Coronavirus has Impacted Travel

Question: How has Coronavirus situation affected your travel? (Select all that apply) ?

Due to the Coronavirus situation, I have_____.

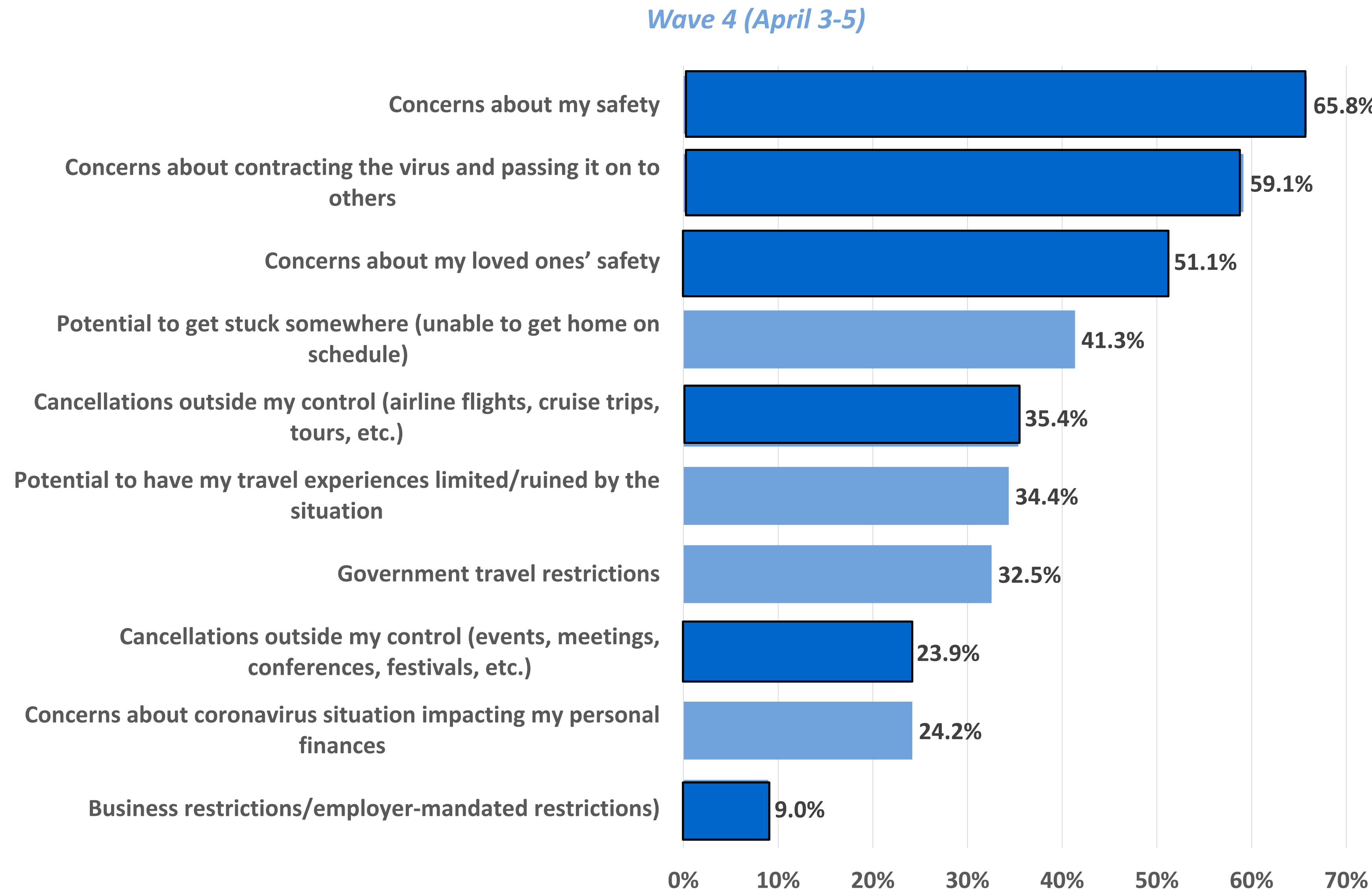


(Base: Respondents whose travel was impacted by the Coronavirus, 533, 770, 795 and 890 completed surveys. Data collected March 13-16, 20-22, 27-29, and April 3-5, 2020)

Why the Coronavirus is Impacting Travel

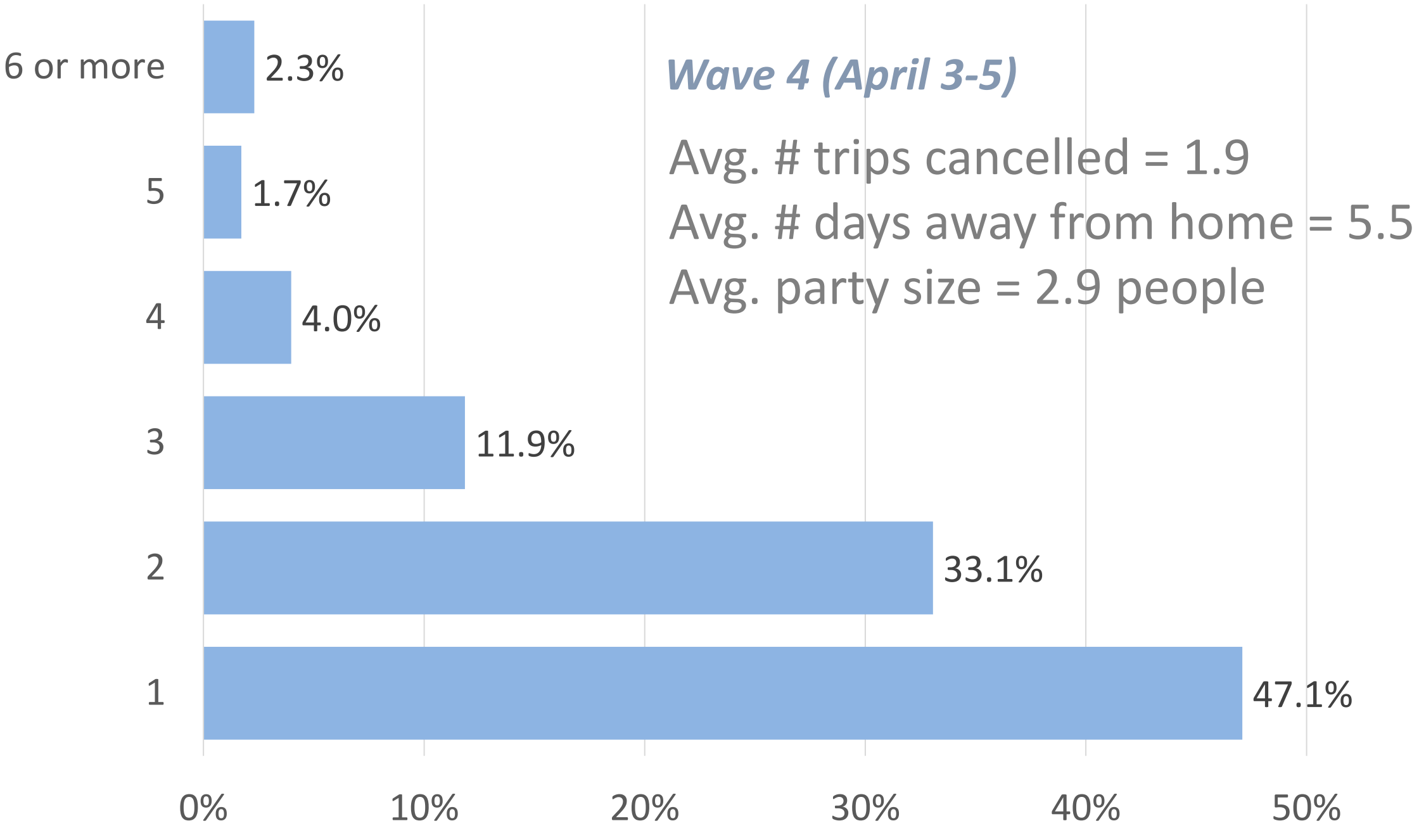
Question: Which of the following are reasons the Coronavirus situation has changed your travels?

(Base: Respondents whose travel was impacted by the Coronavirus, 889 completed surveys. Data collected April 3-5, 2020)

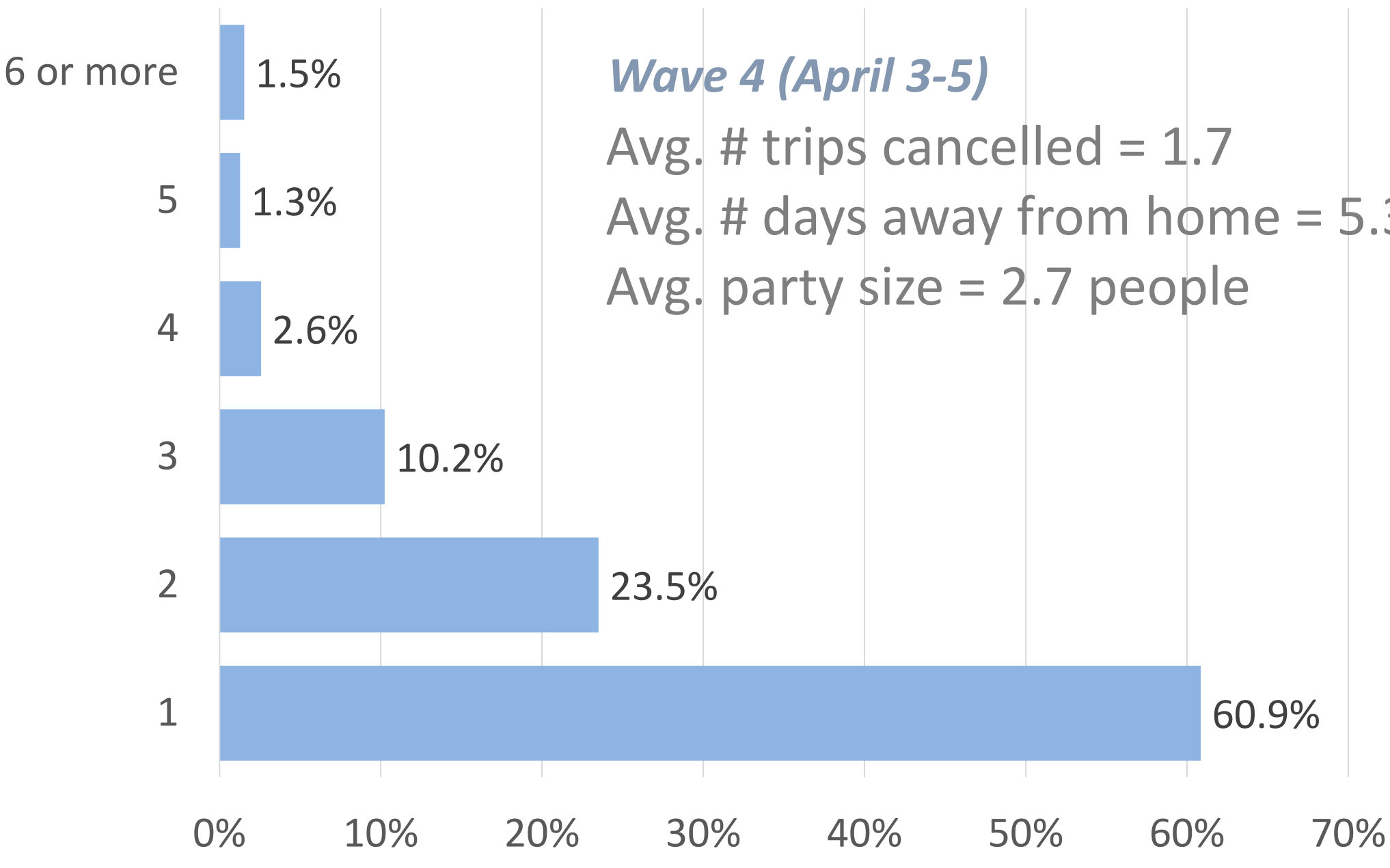


Trips Cancelled/Postponed

Question: How many trips did you cancel?



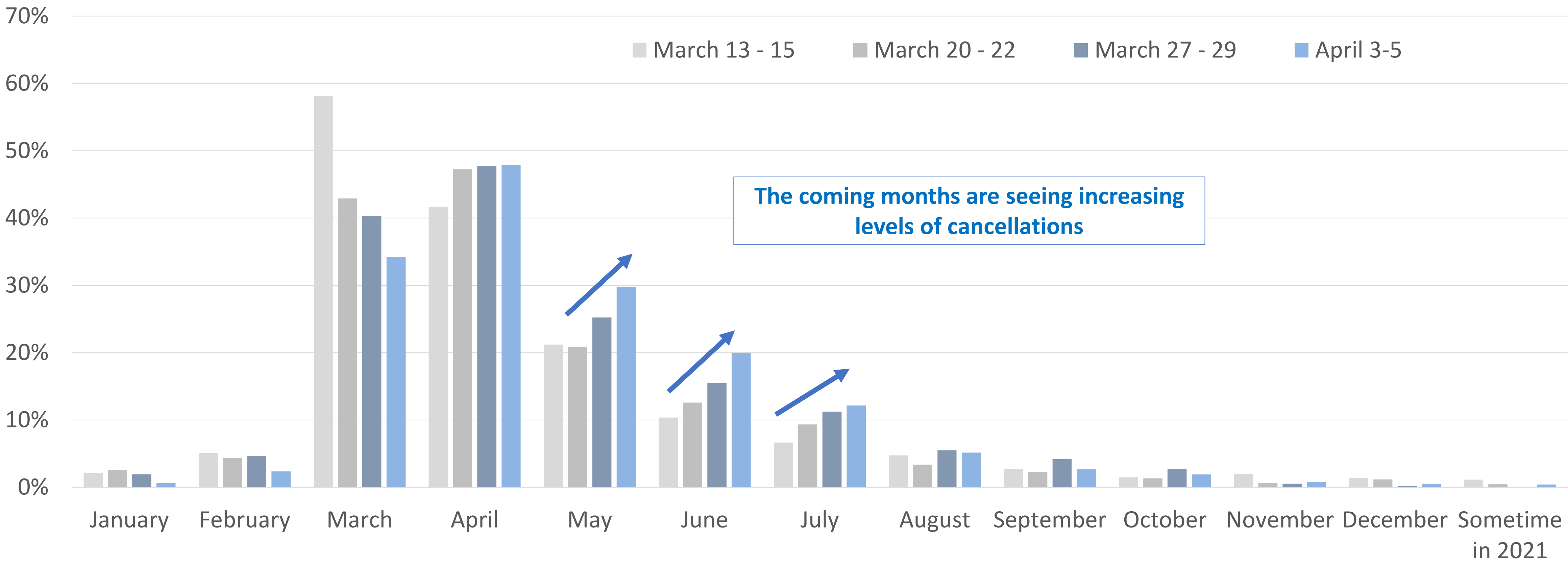
Question: How many trips did you postpone?



(Base: Respondents cancelling/postponing a trip, 581/435 completed surveys. Data collected April 3-5th, 2020)

Month of Trip Cancellation

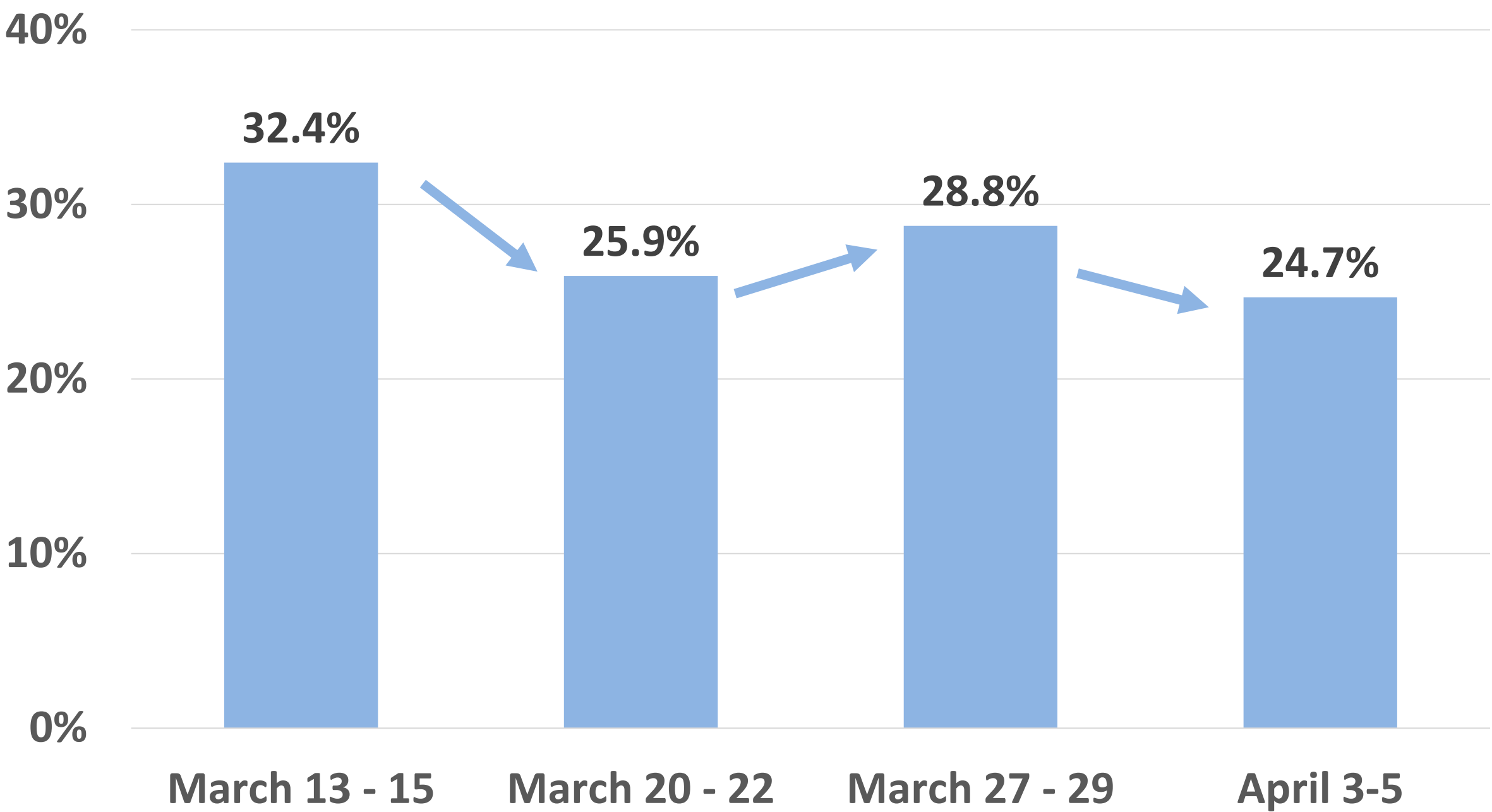
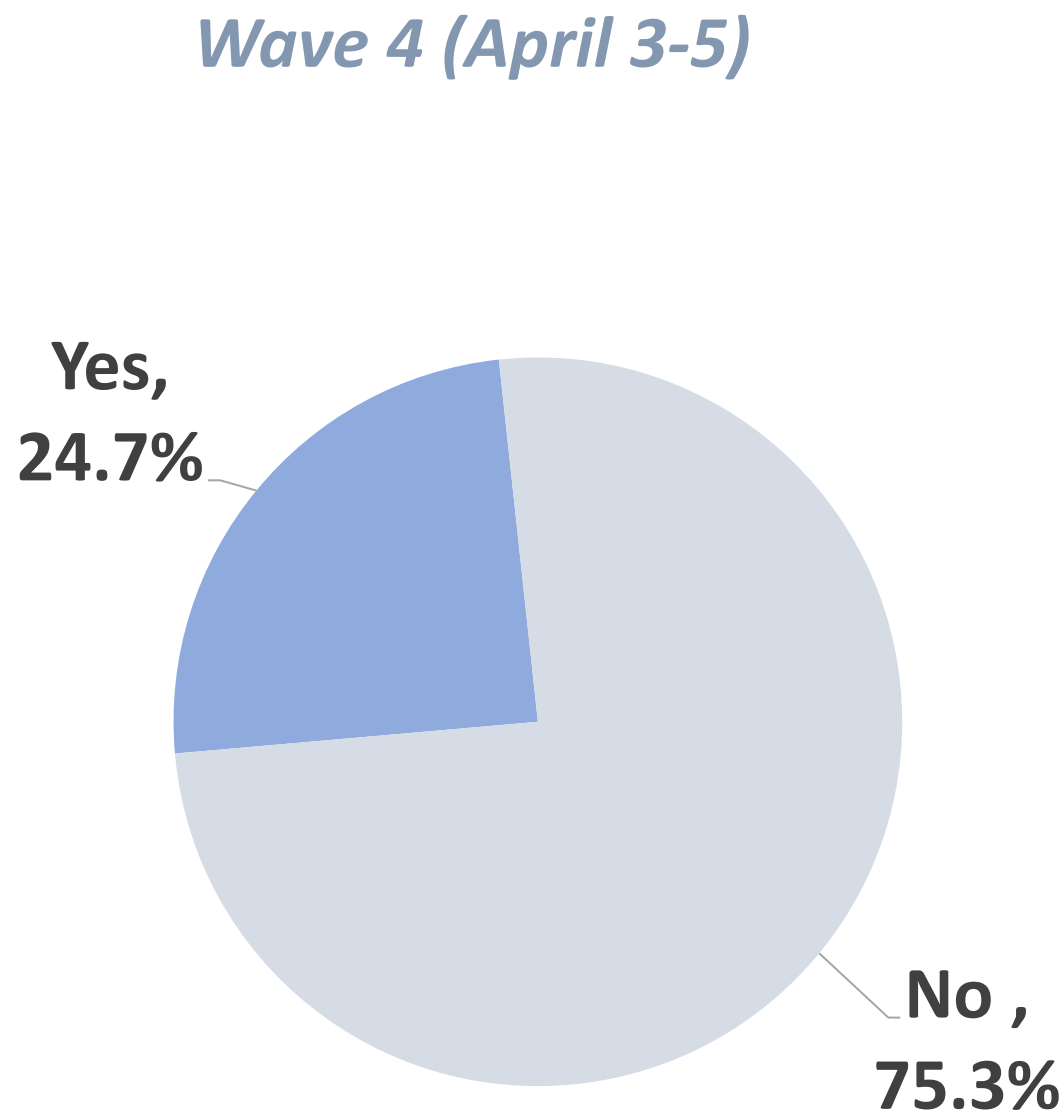
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)



(Base: Cancelling trips , 292,477, 506 and 580 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020.
Note: Data purposefully excluded from this chart for readability.)

Were Postponed Trips Rescheduled?

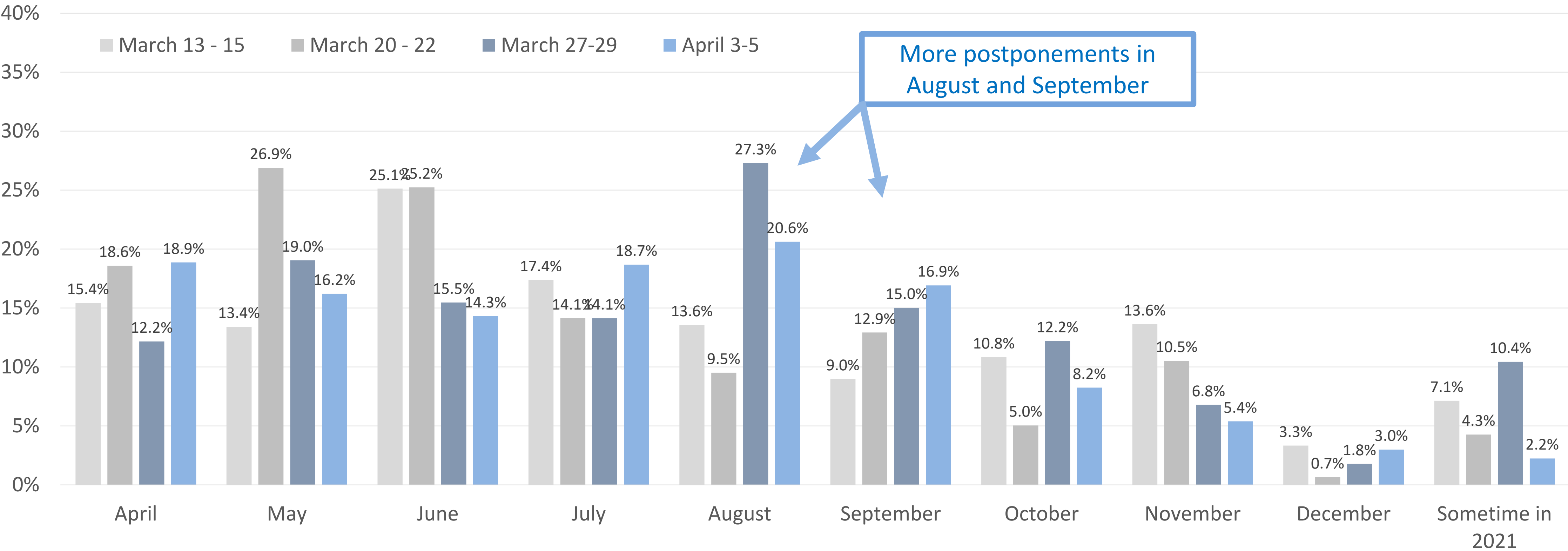
Question: You said earlier that you had POSTPONED at least one trip. Have you rescheduled a date (even tentatively) for this travel?



(Base: Postponing trips , 277, 354, 404, and 433 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Month Postponed Trips Rescheduled

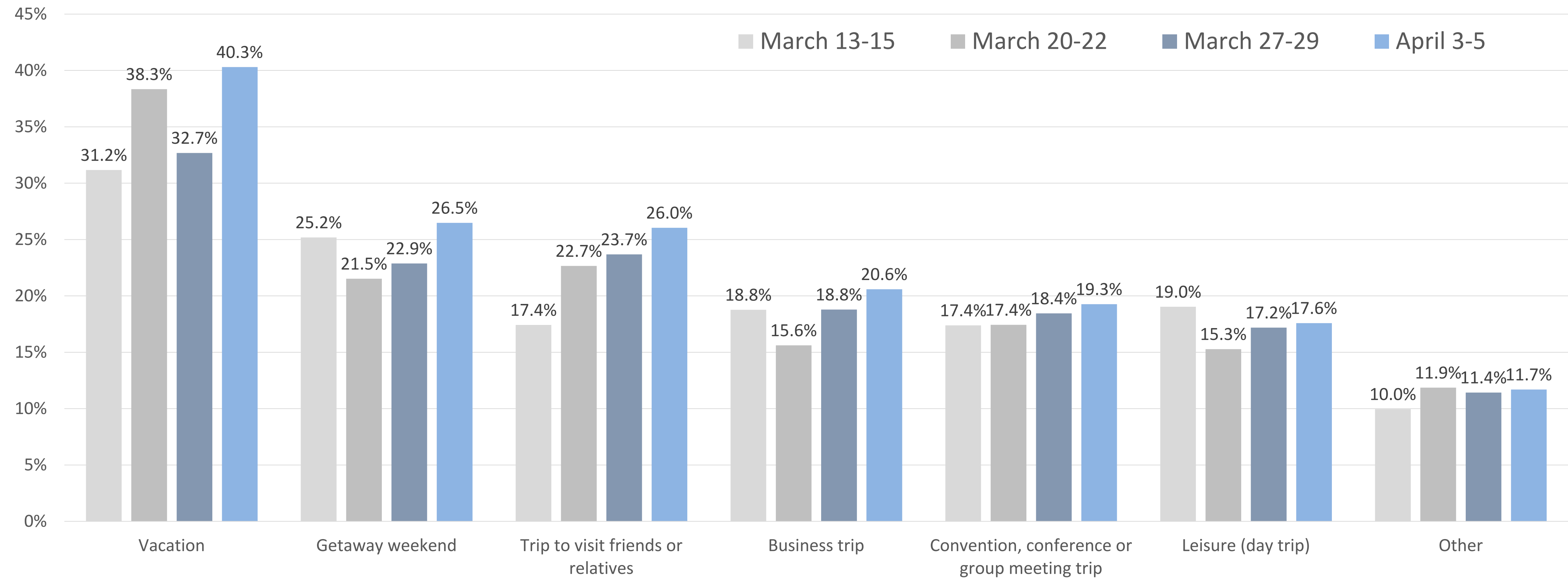
Question: The trip(s) you postponed were rescheduled to take place in which month(s)? (Select all that apply)



(Base: Postponing trips rescheduled , 99,86, 120 and 107 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Types of Trips Cancelled

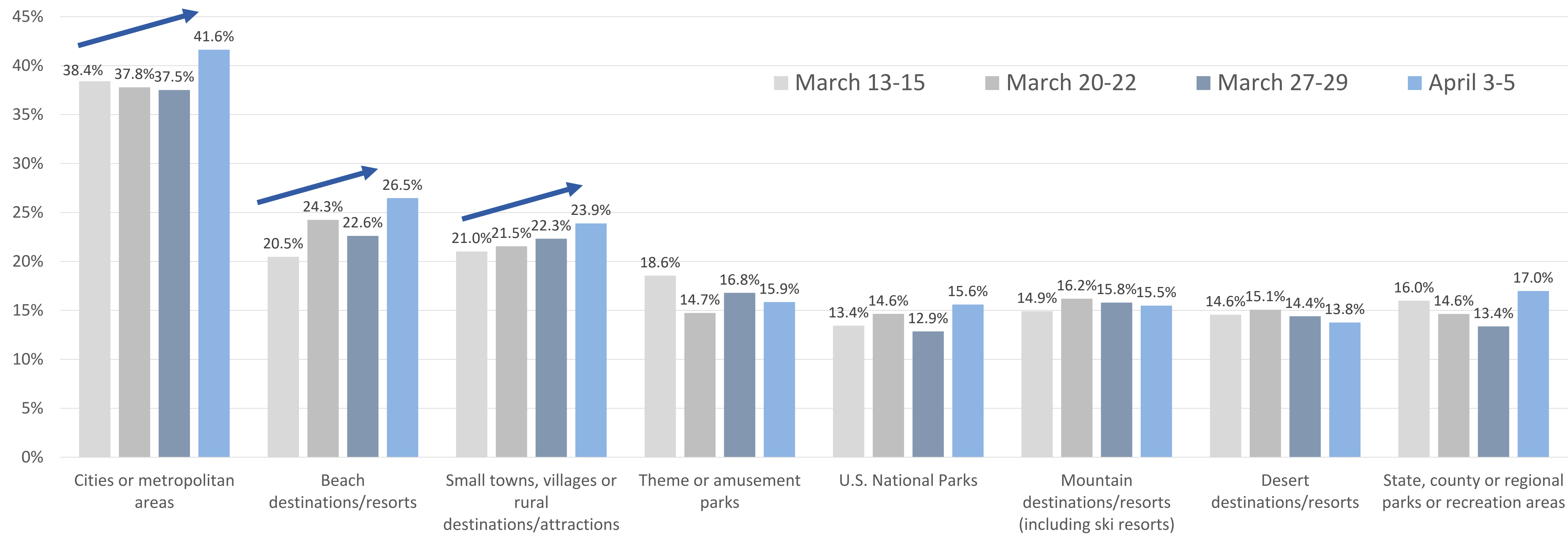
Question: What kind of trip (or trips) did you cancel? (Select all that apply)



(Base: Cancelling trips , 292,477, 506 and 580 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Type of Destination Being Cancelled

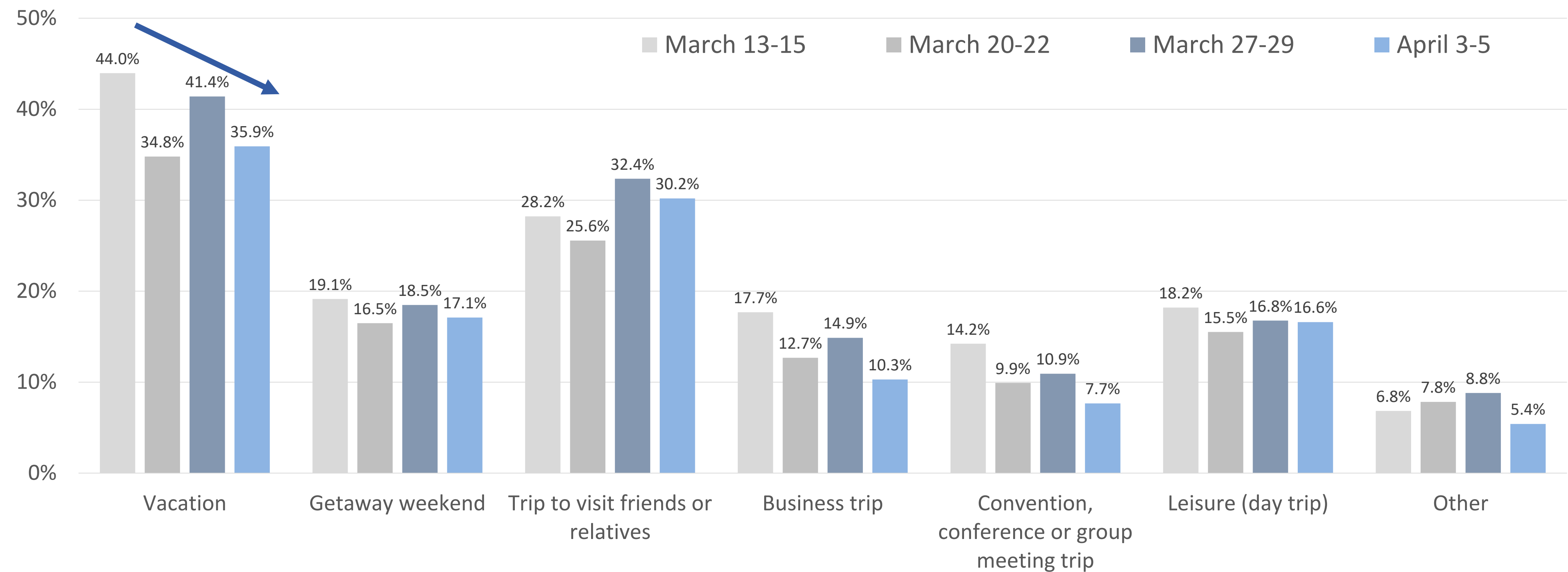
Question: Thinking about these canceled trips, which destination types were you planning to visit but ended up canceling? (Select all that apply)



(Base: Cancelling trips , 292,477, 506 and 580 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Types of Trips Postponed

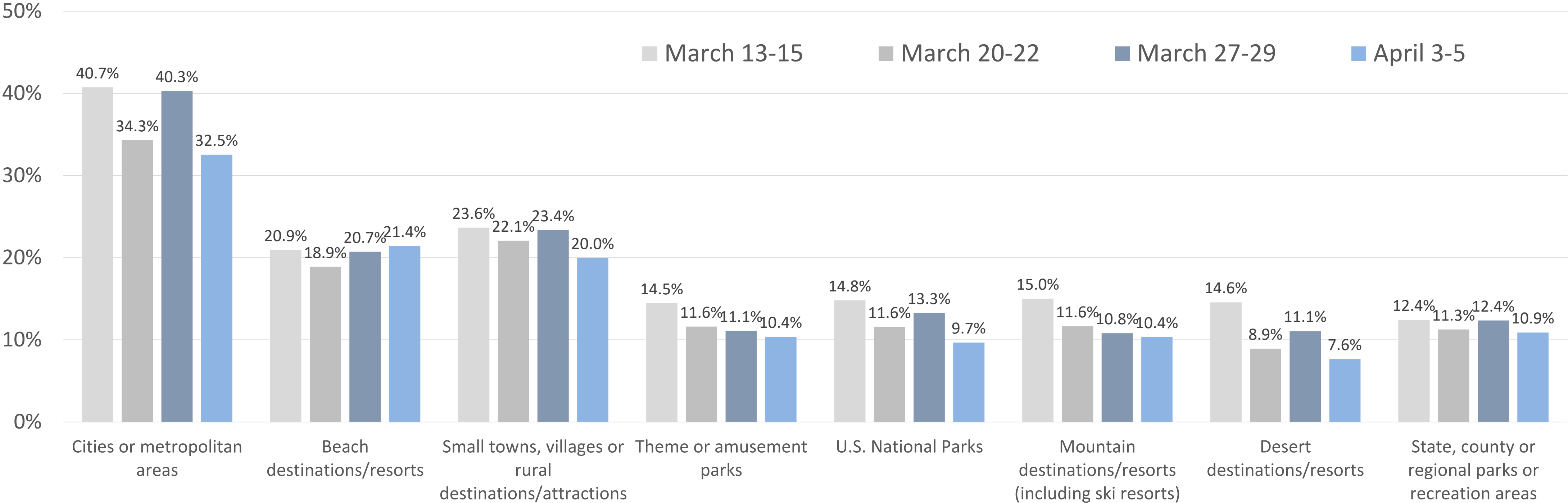
Question: What kind of trip (or trips) did you postpone? (Select all that apply)



(Base: Postponing trips , 277, 354, 404 and 435 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

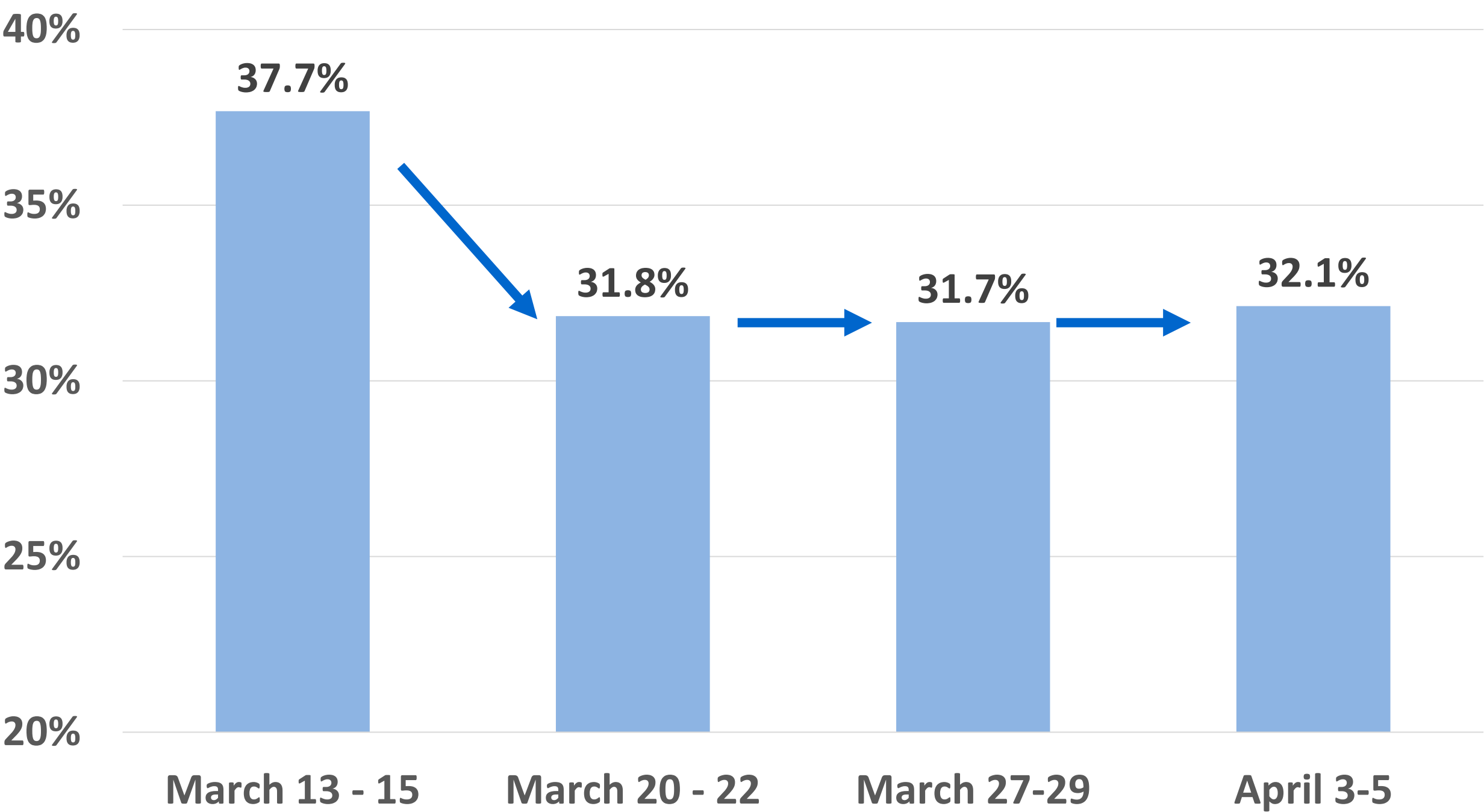
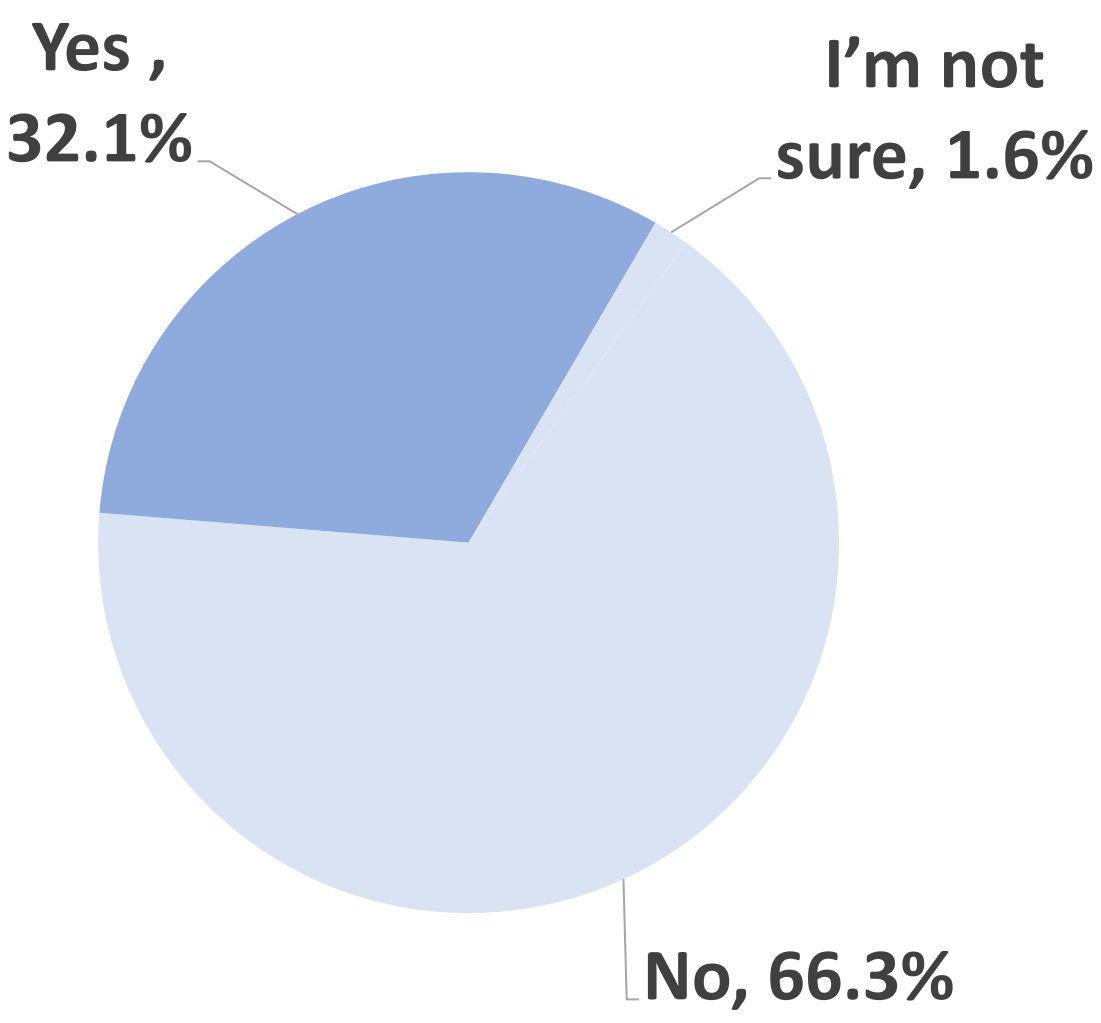
Type of Destination Being Postponed

Question: Thinking about these postponed trips, which destination types were you planning to visit but ended up postponing?
(Select all that apply)



International Trips Postponed and Cancelled

Question: Were any of the trips you canceled or postponed foreign trips (i.e., travel to countries outside the United States)?



(Base: Respondents cancelling or postponing a trip, 890 completed surveys. Data collected April 3-5, 2020)

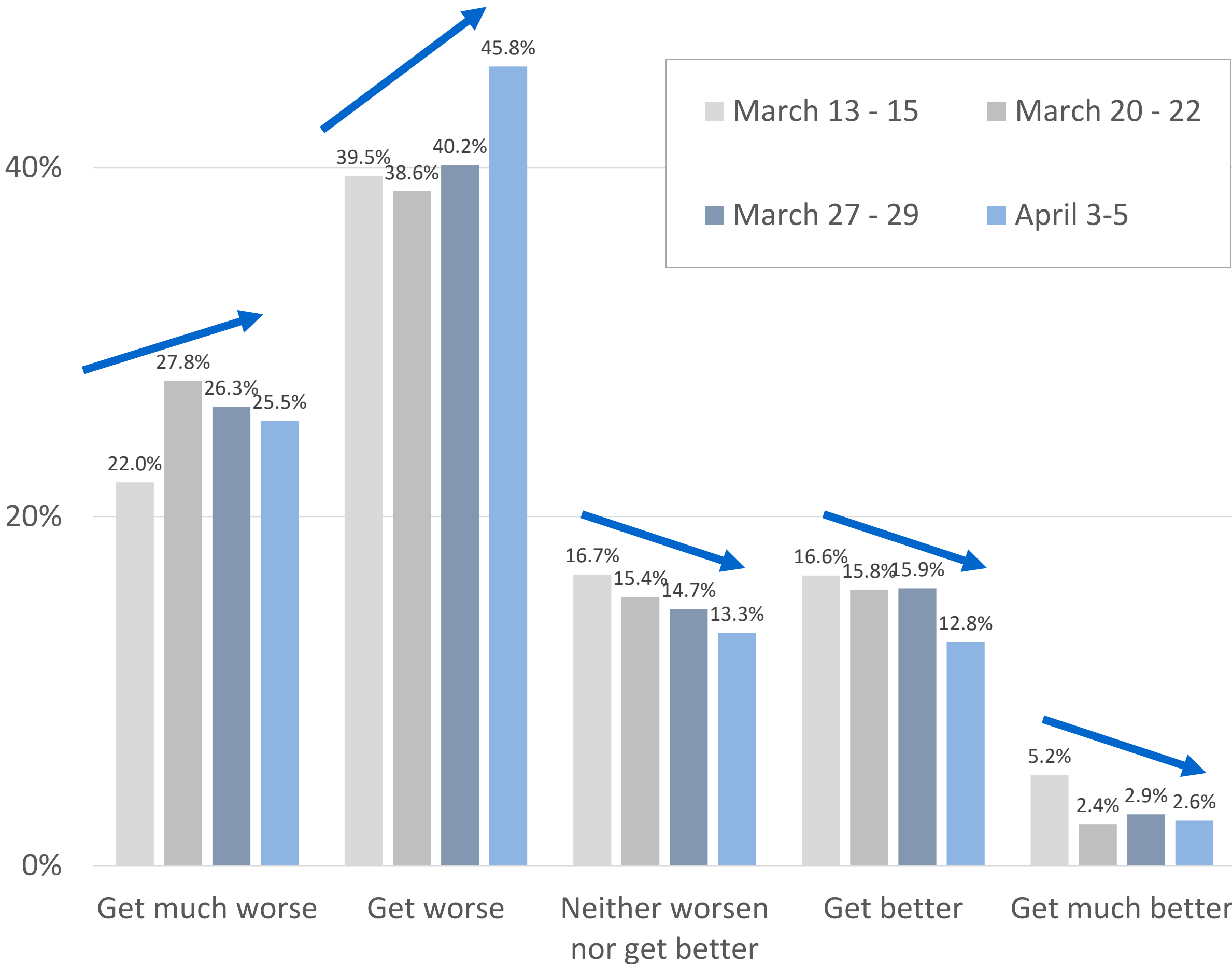
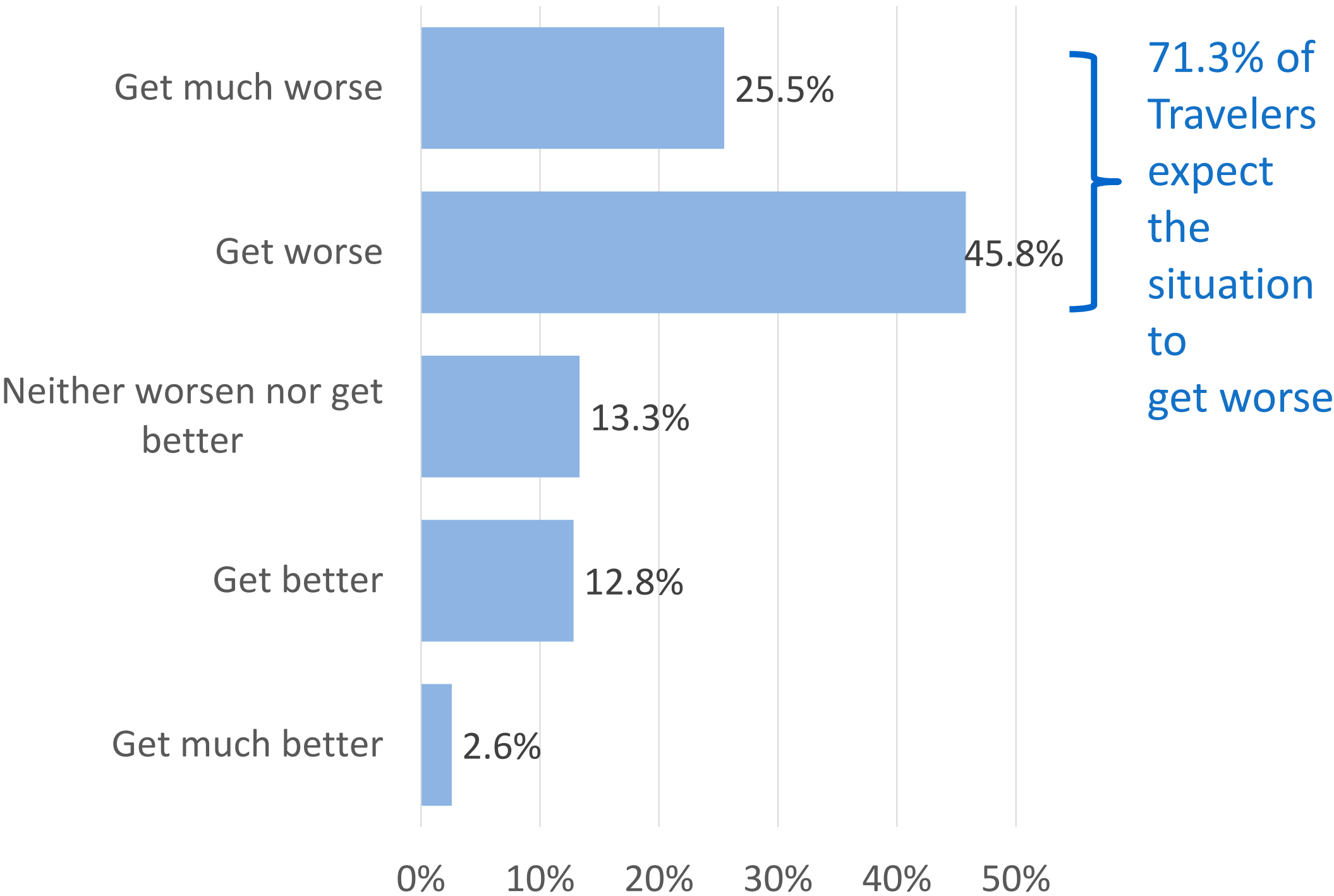
Impact on Sentiment & Perceptions



Expectations for Coronavirus Outbreak

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 _____



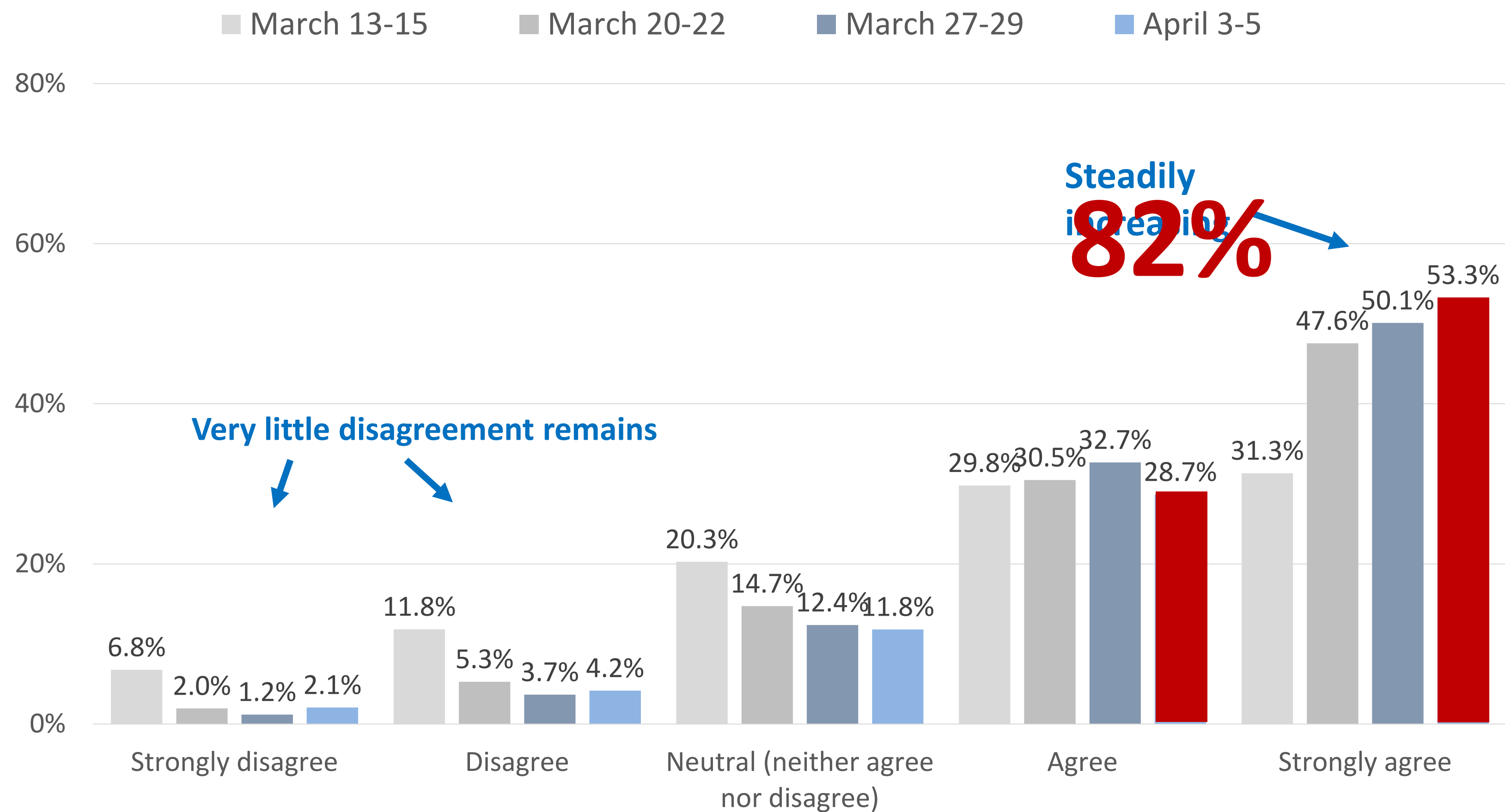
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Avoiding Travel Until the Crisis Blows Over

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

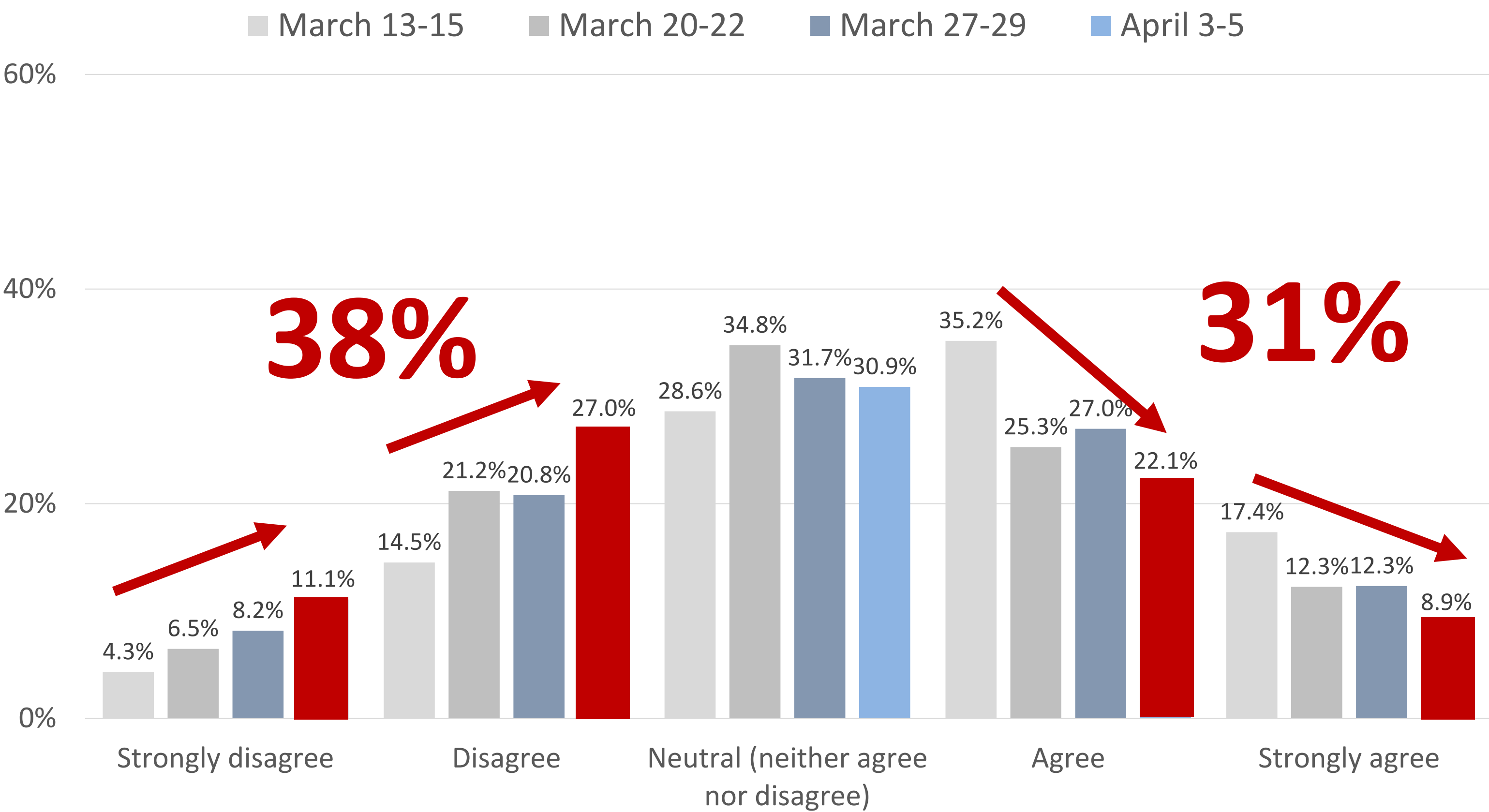


Expectations for Summer Travel Season

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

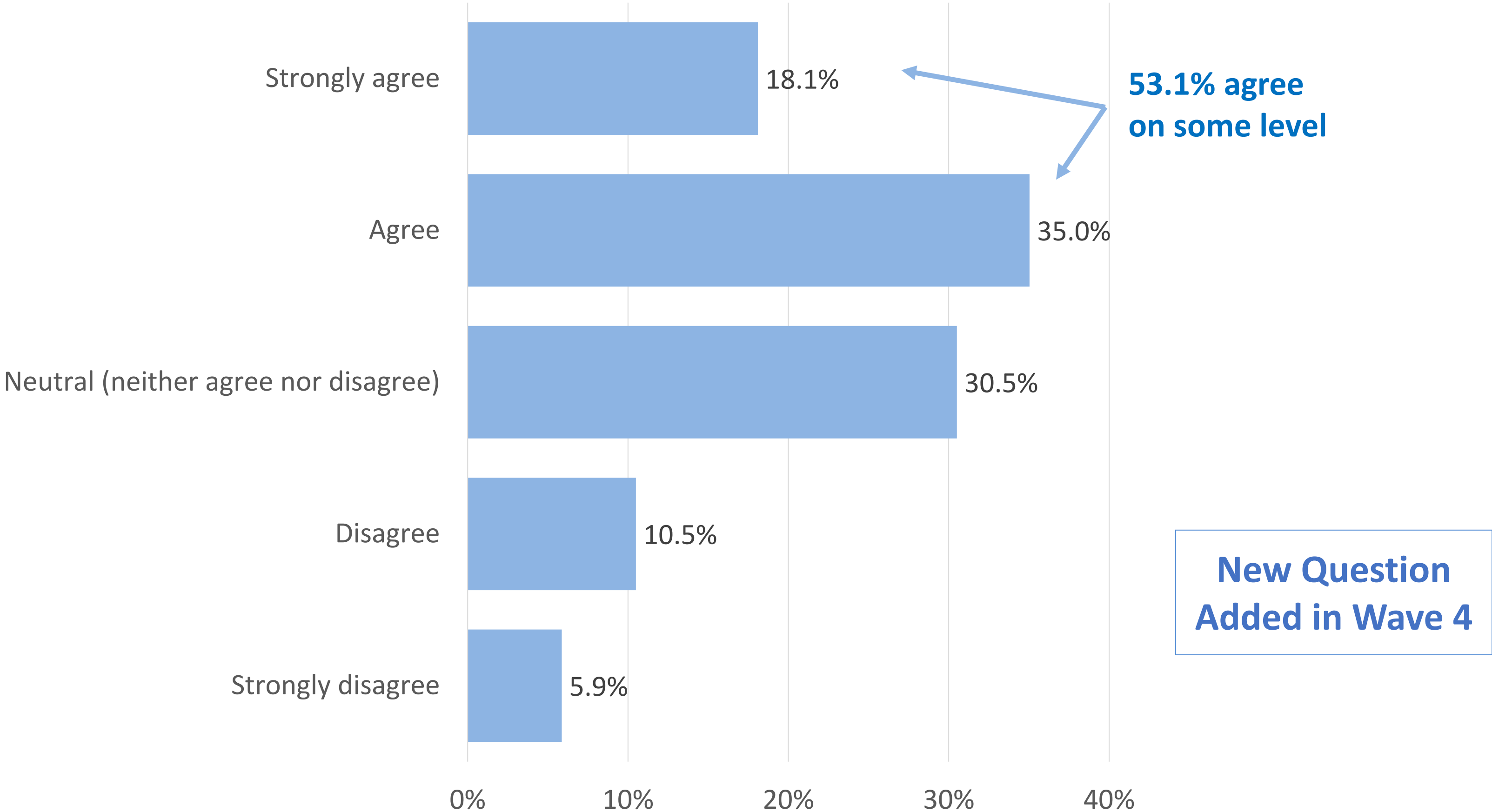


Expectations for Fall Travel Season

How much do you agree with the following statement?

Statement: I expect that I will be traveling in the Fall of 2020.

(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

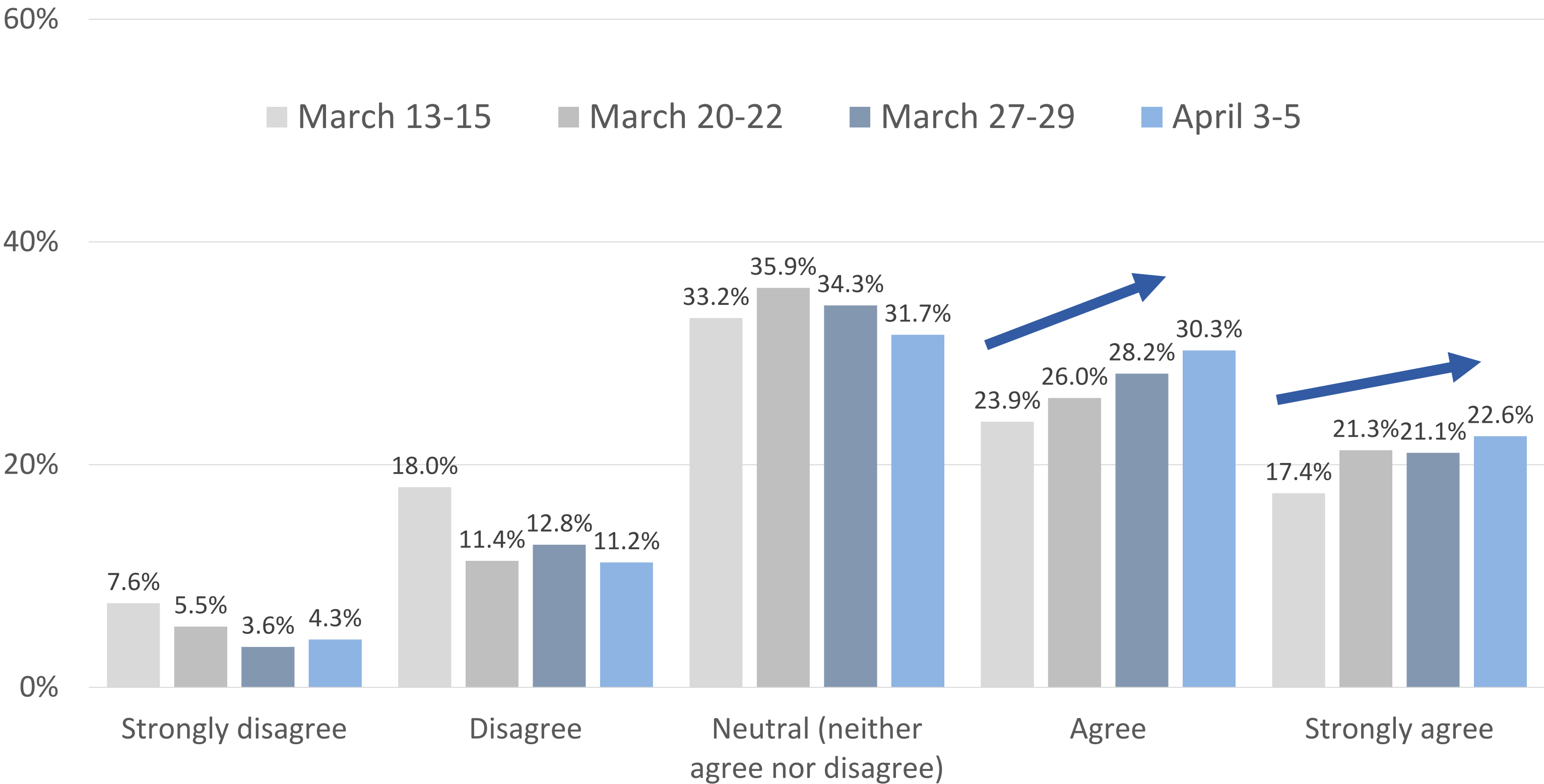


Staycations as a Replacement for Vacations

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

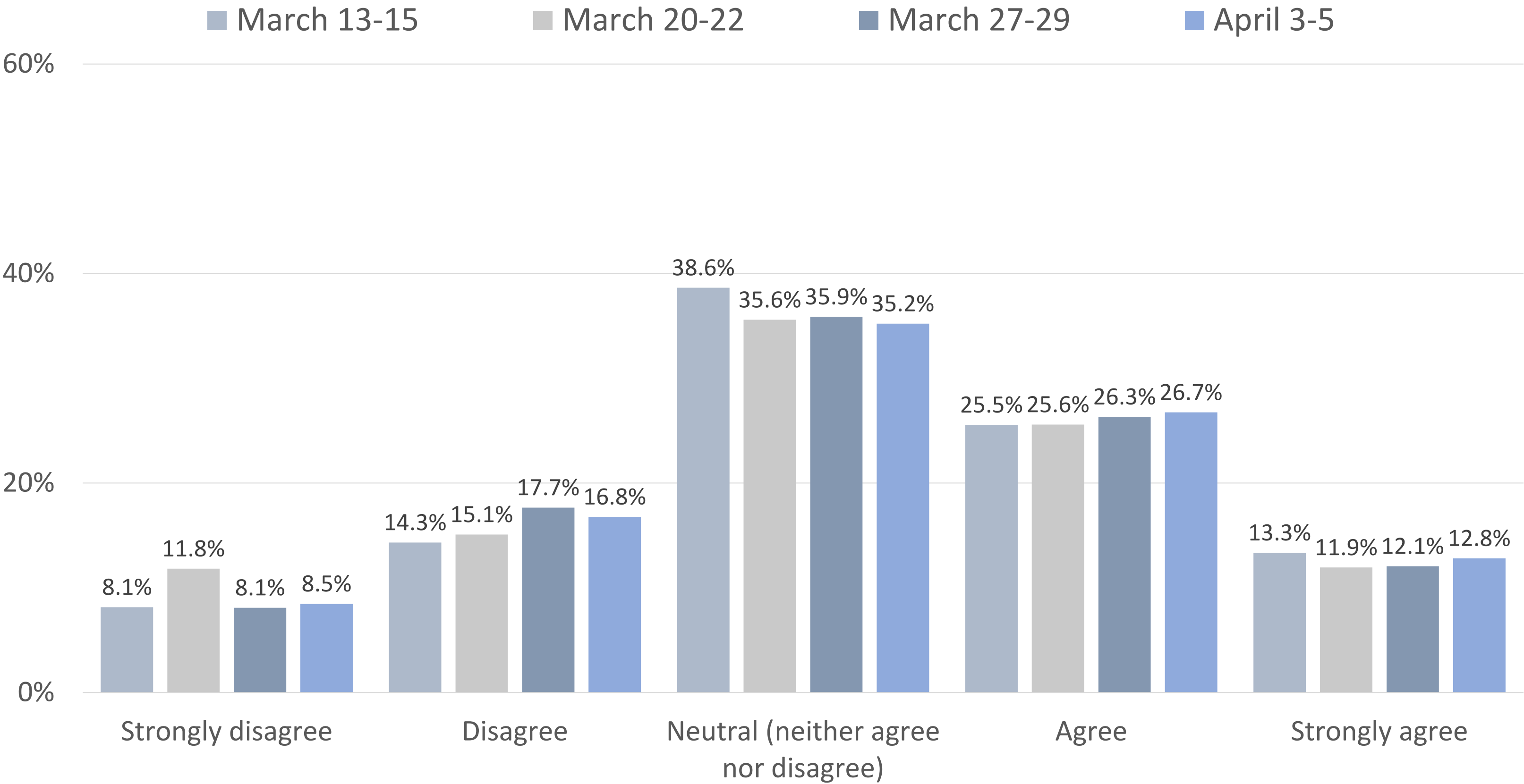


Replacing Air Travel With Road Trips

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

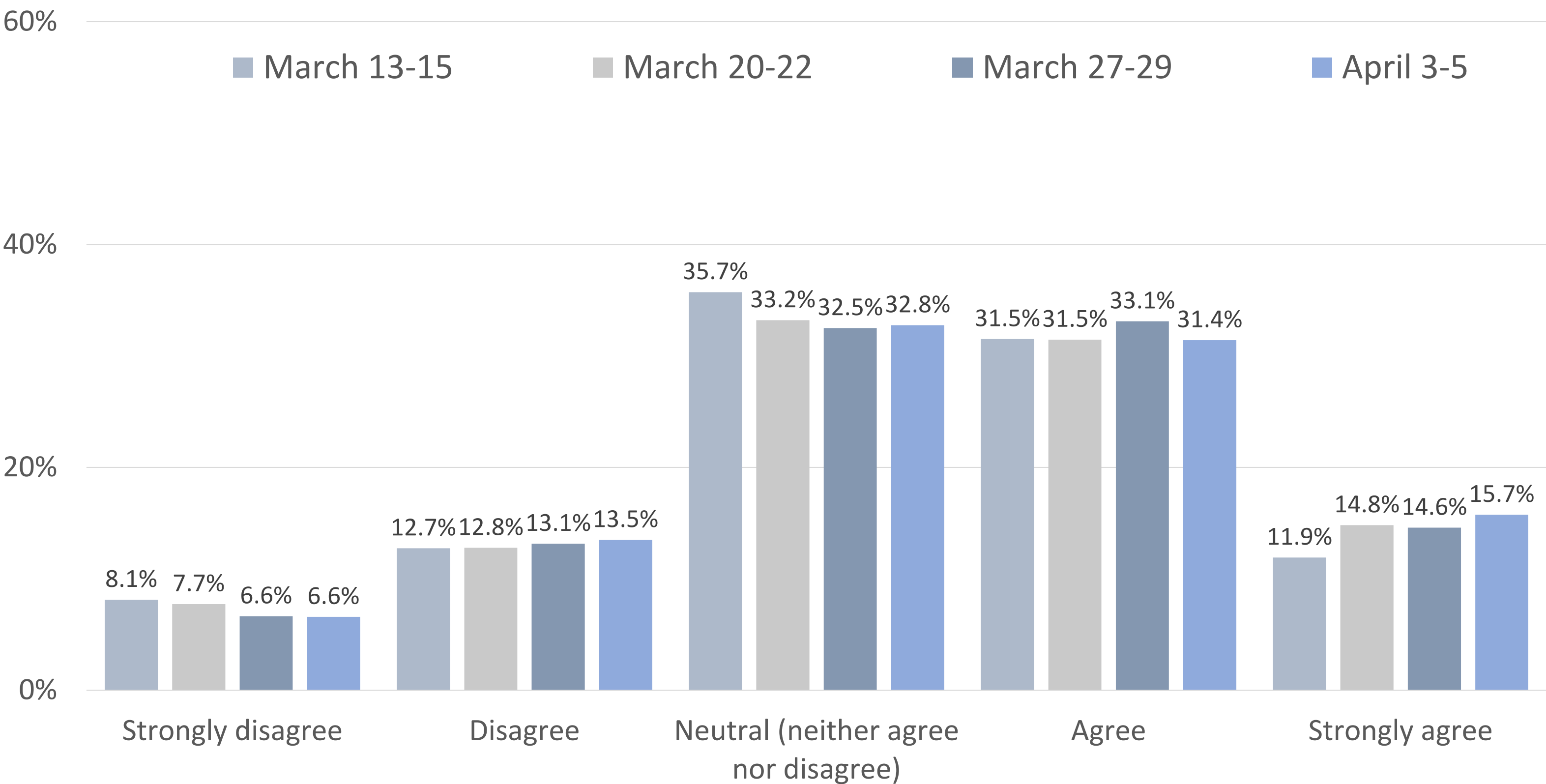


Replacing Long-haul Travel with Regional Trips

How much do you agree with the following statement?

Statement: Because of the Coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

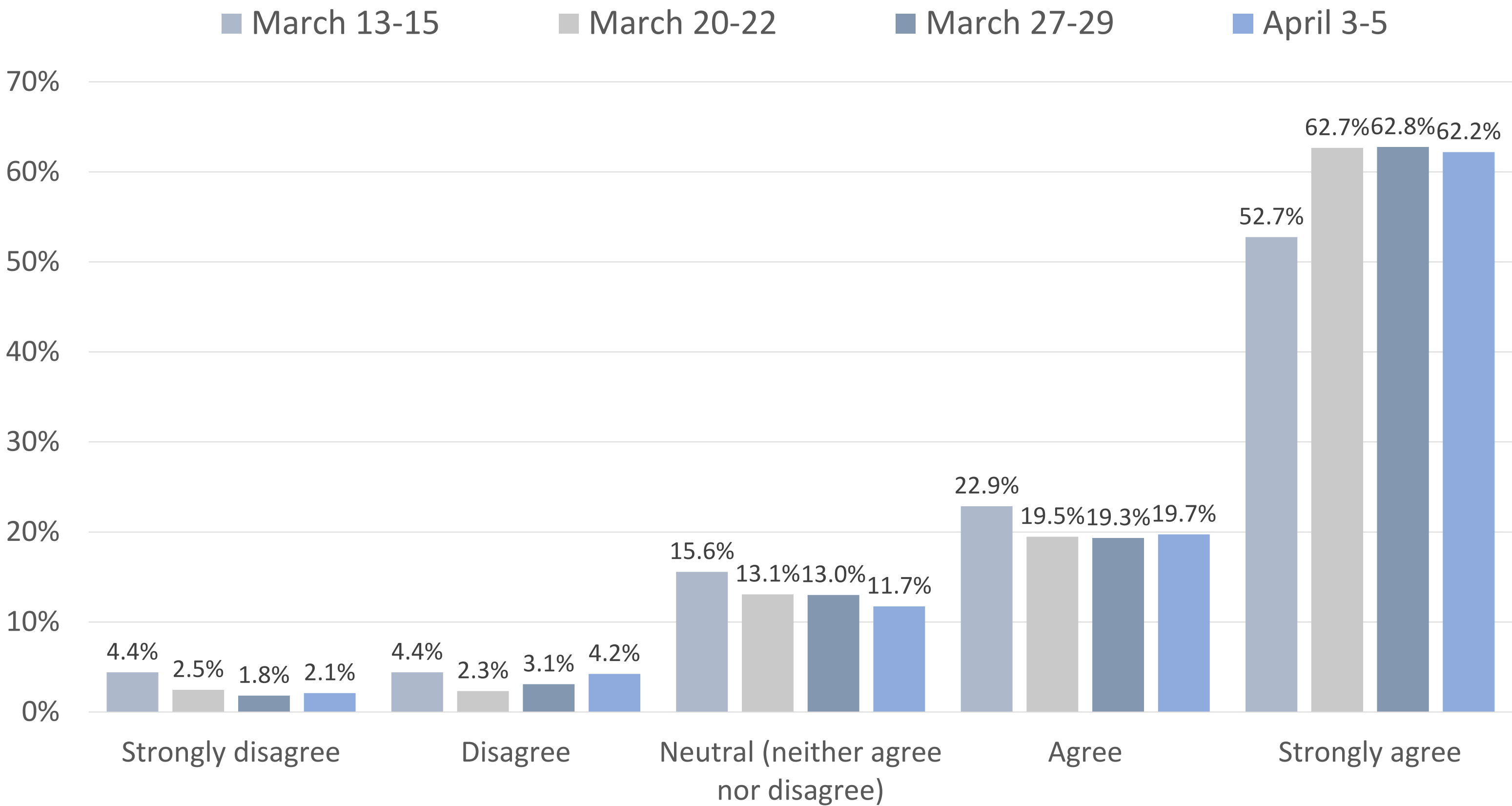


Avoiding International Travel

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020))

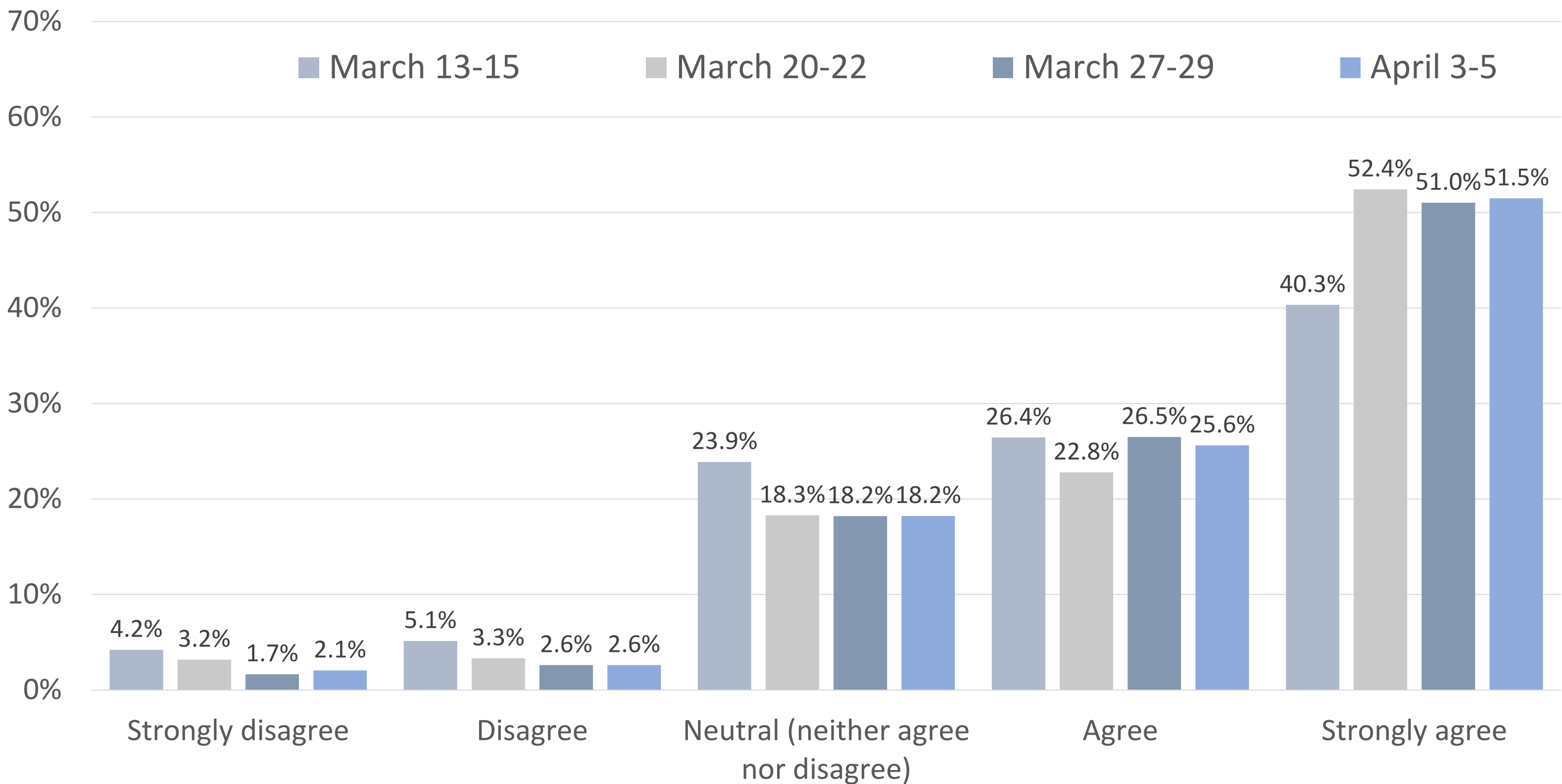


Avoiding Conventions & Conferences

How much do you agree with the following statement?

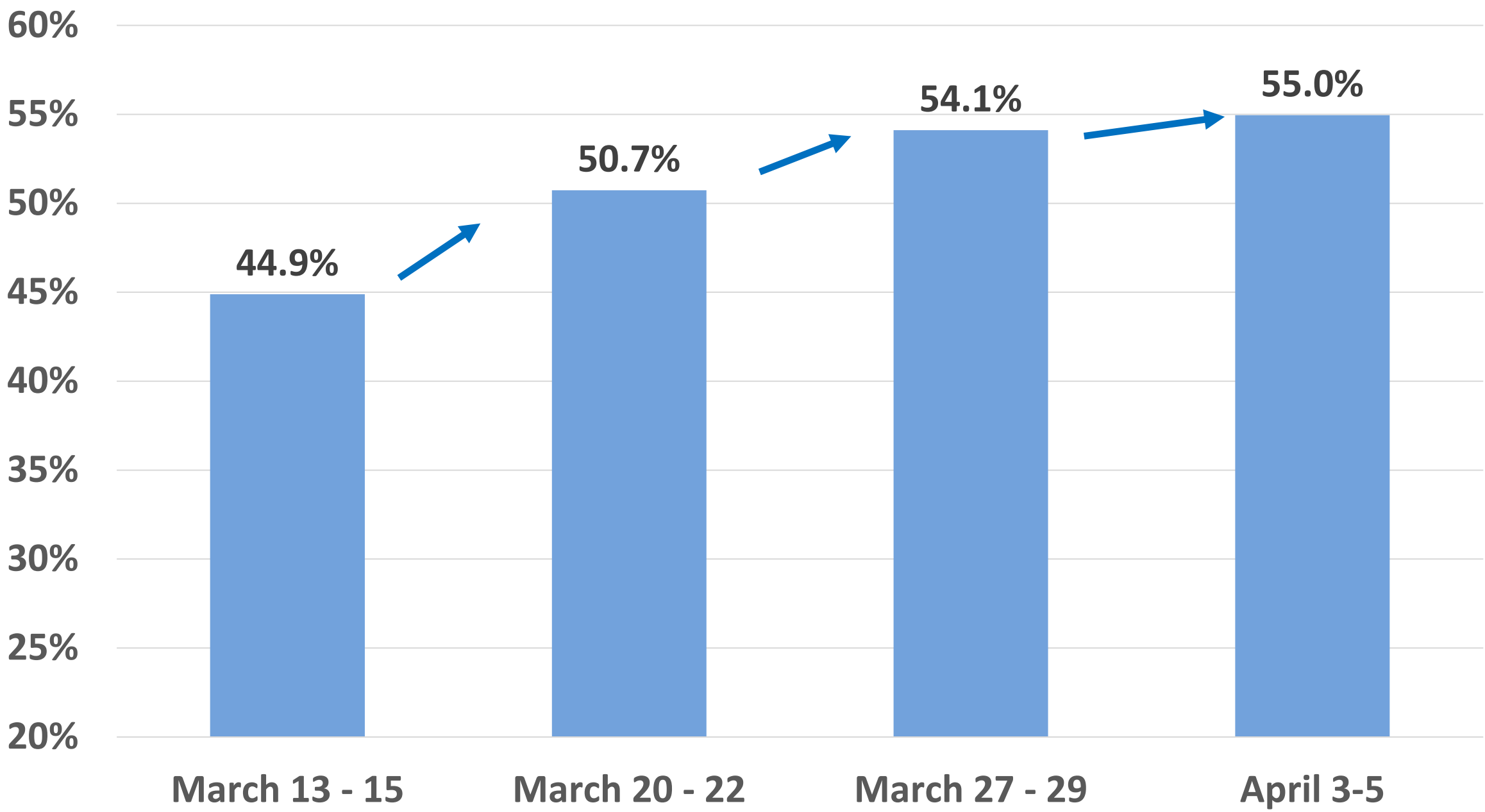
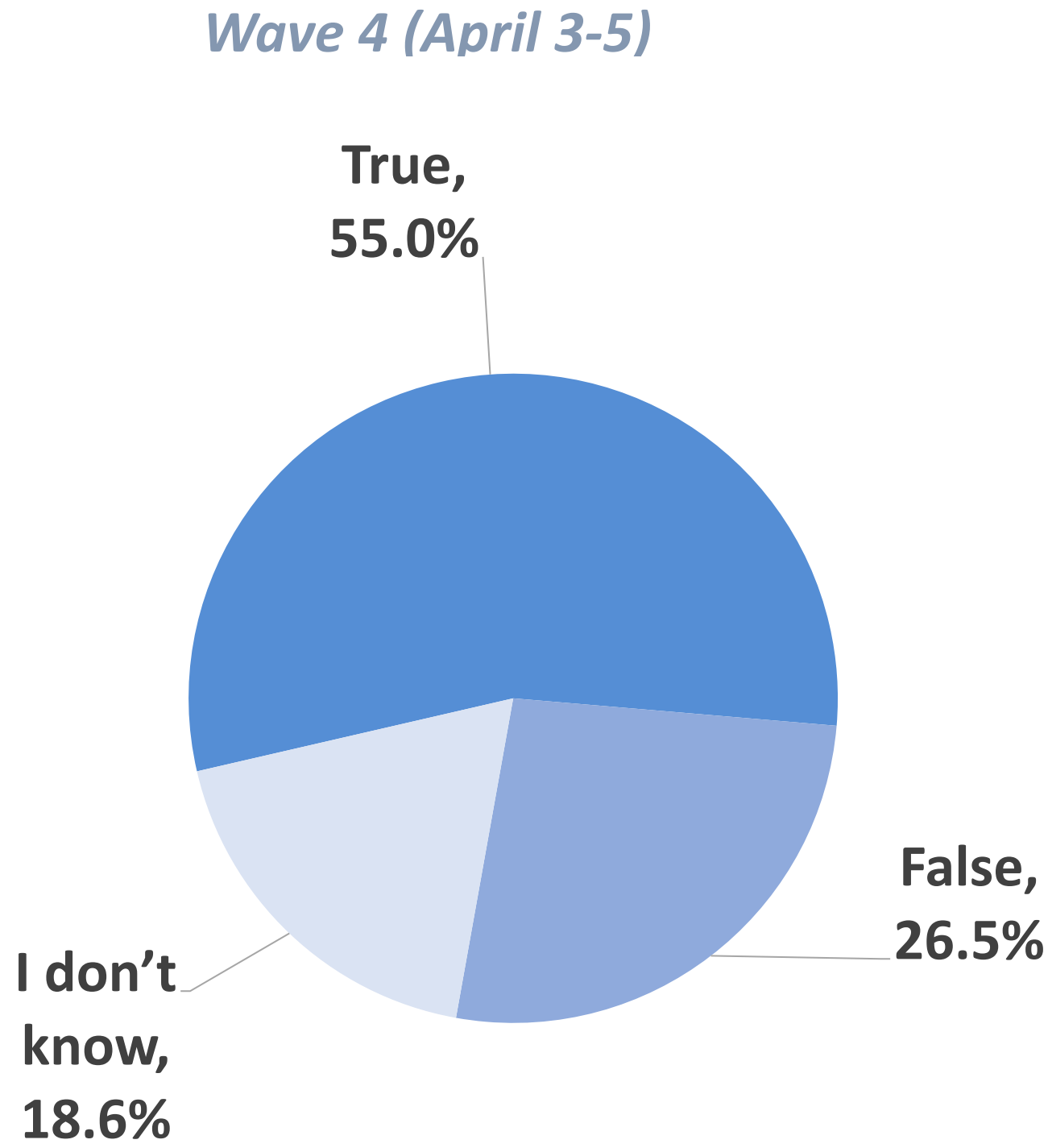
Statement: I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)



Business Travel Restrictions

True or False: My employer has put travel restrictions in place due to the Coronavirus situation.

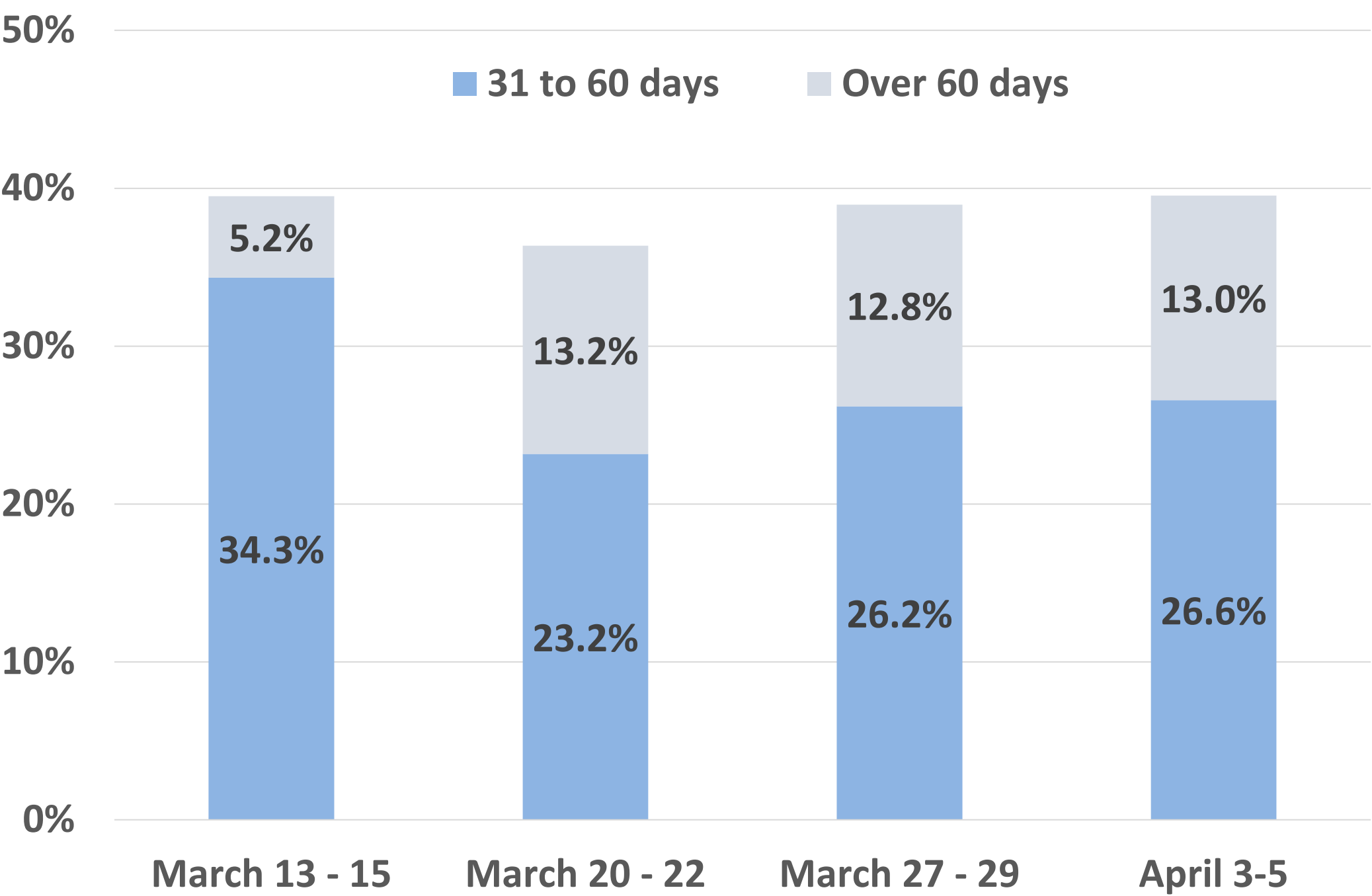
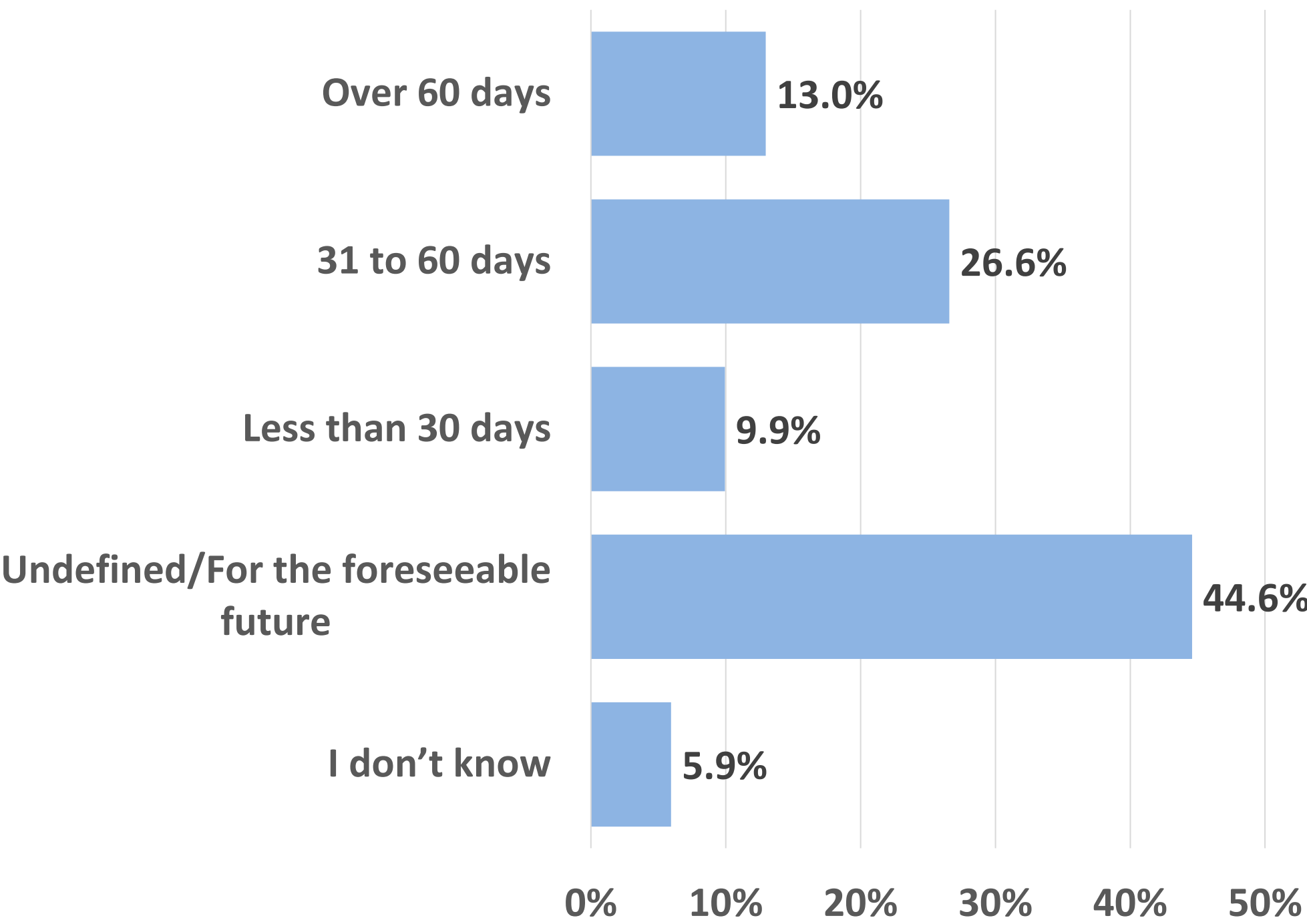


(Base: Employed respondents, 909, 916, 753 and 1,041 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Business Travel Restrictions

Question: From today, how much longer has your employer said these travel restrictions will be in place? (Select one)

Wave 4 (April 3-5)



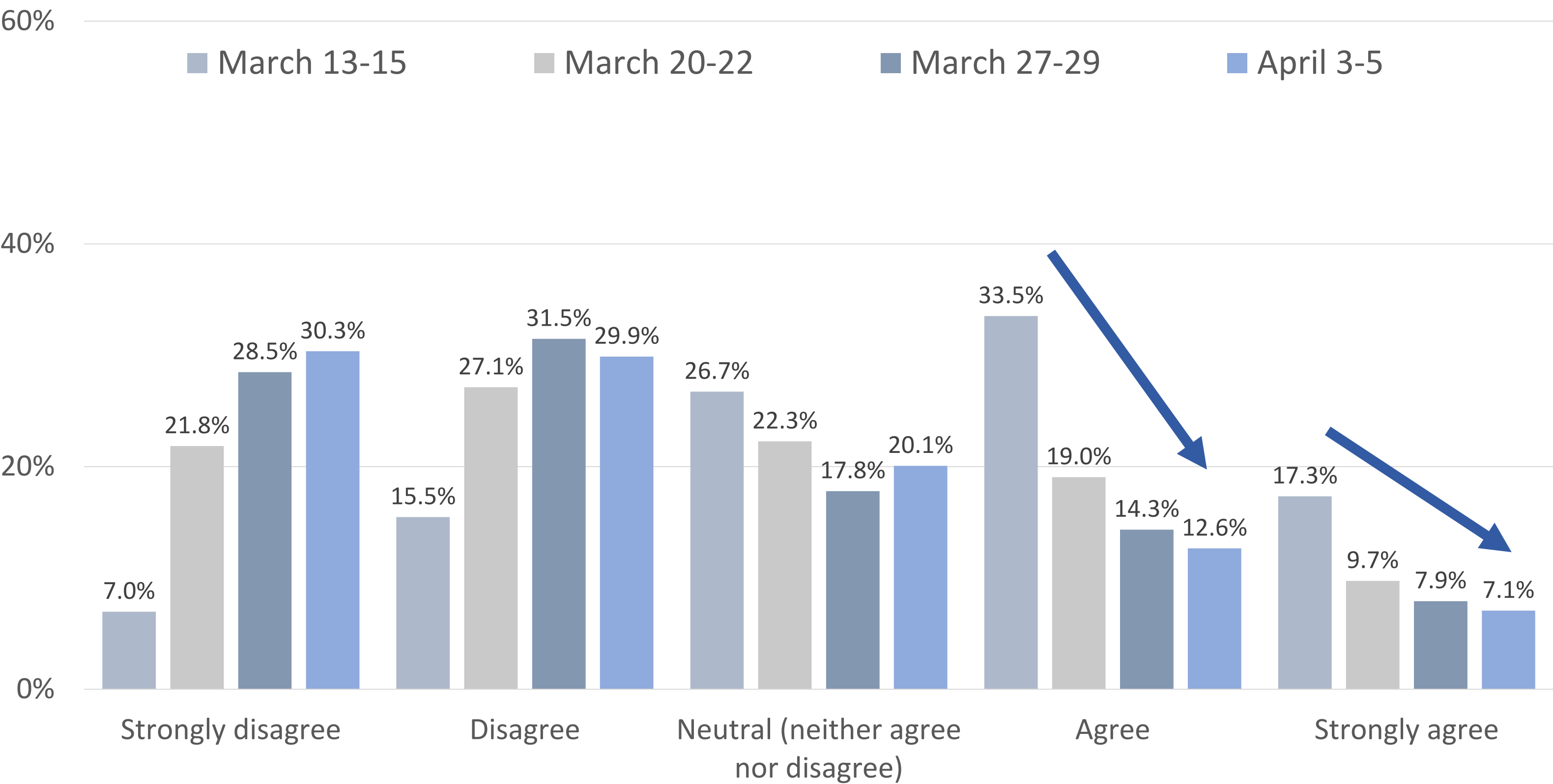
(Base: Employed respondents with travel restrictions, 488, 371, 488 and 581 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

Comfort Enjoying Home Community

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

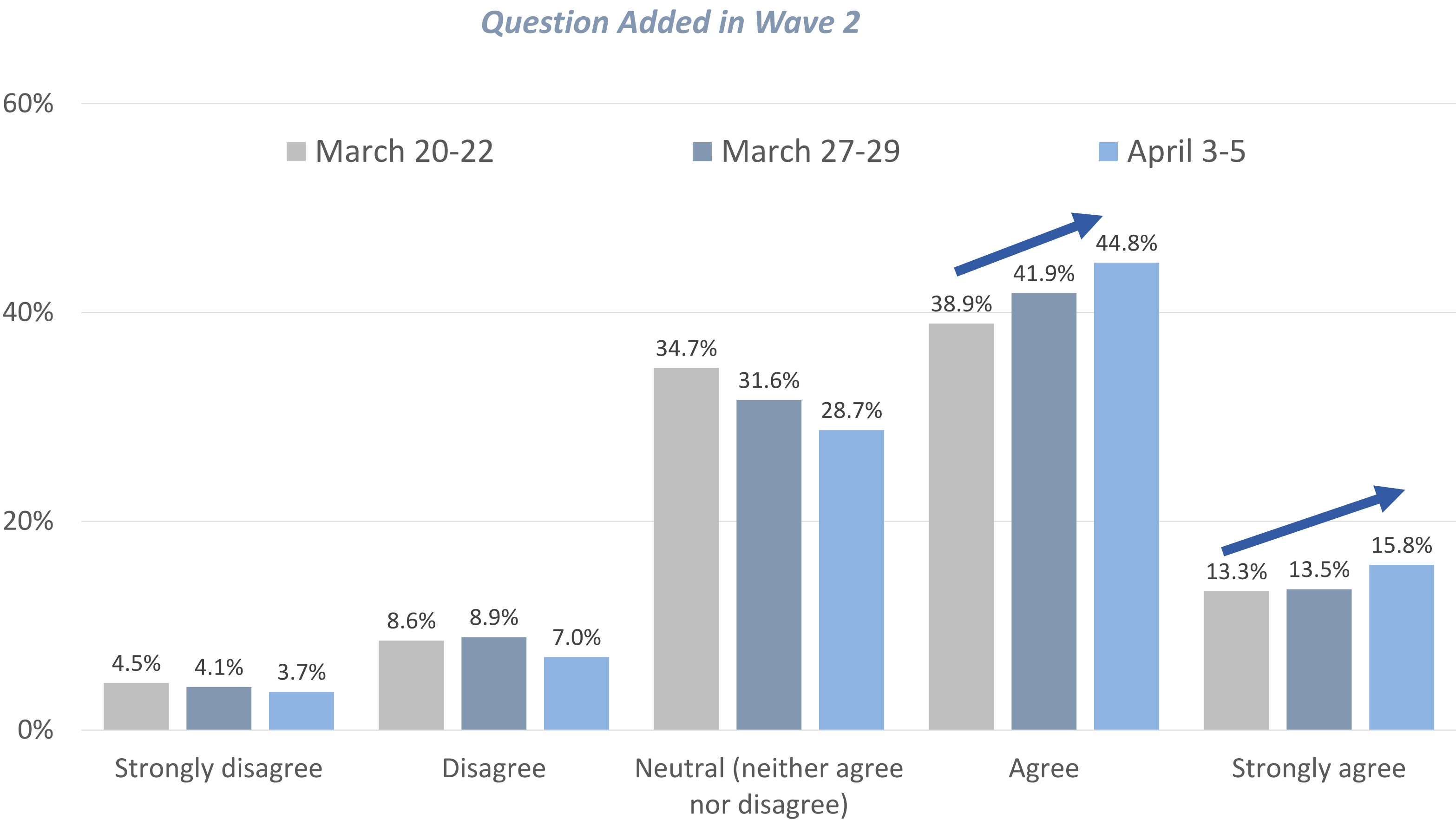


Supporting Local Businesses

How much do you agree with the following statement?

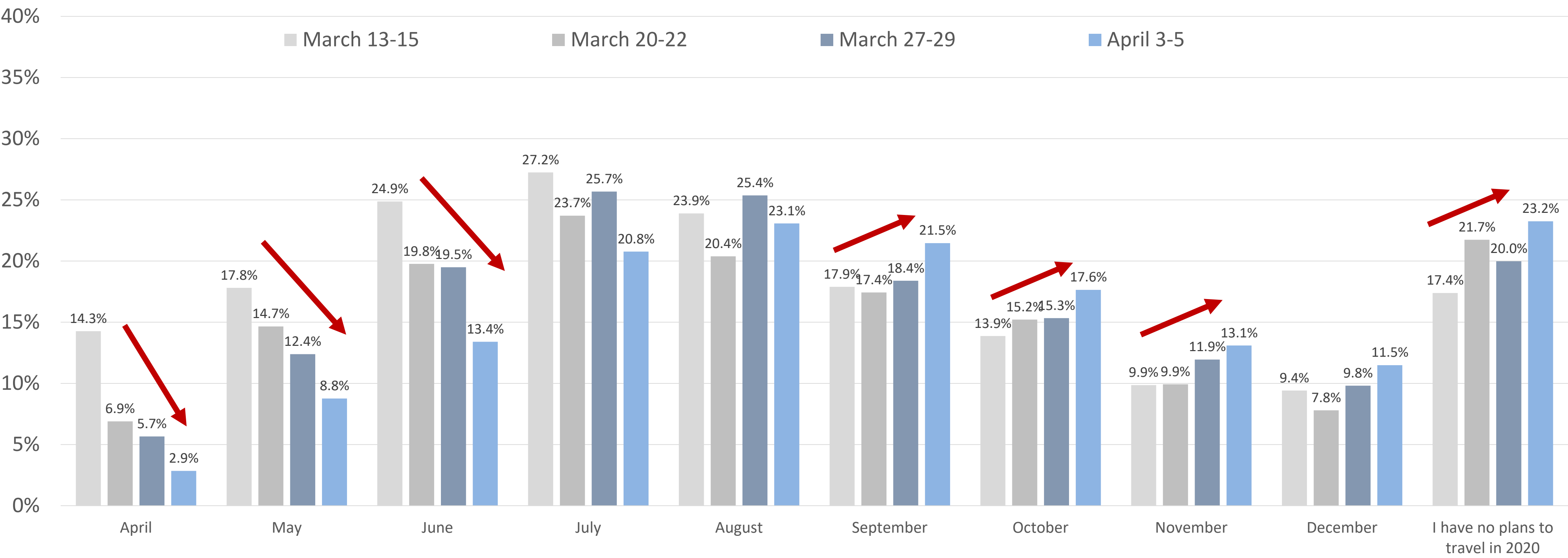
Statement: I have been taking action to try to support local businesses where I live.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)



Upcoming Travel Plans

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



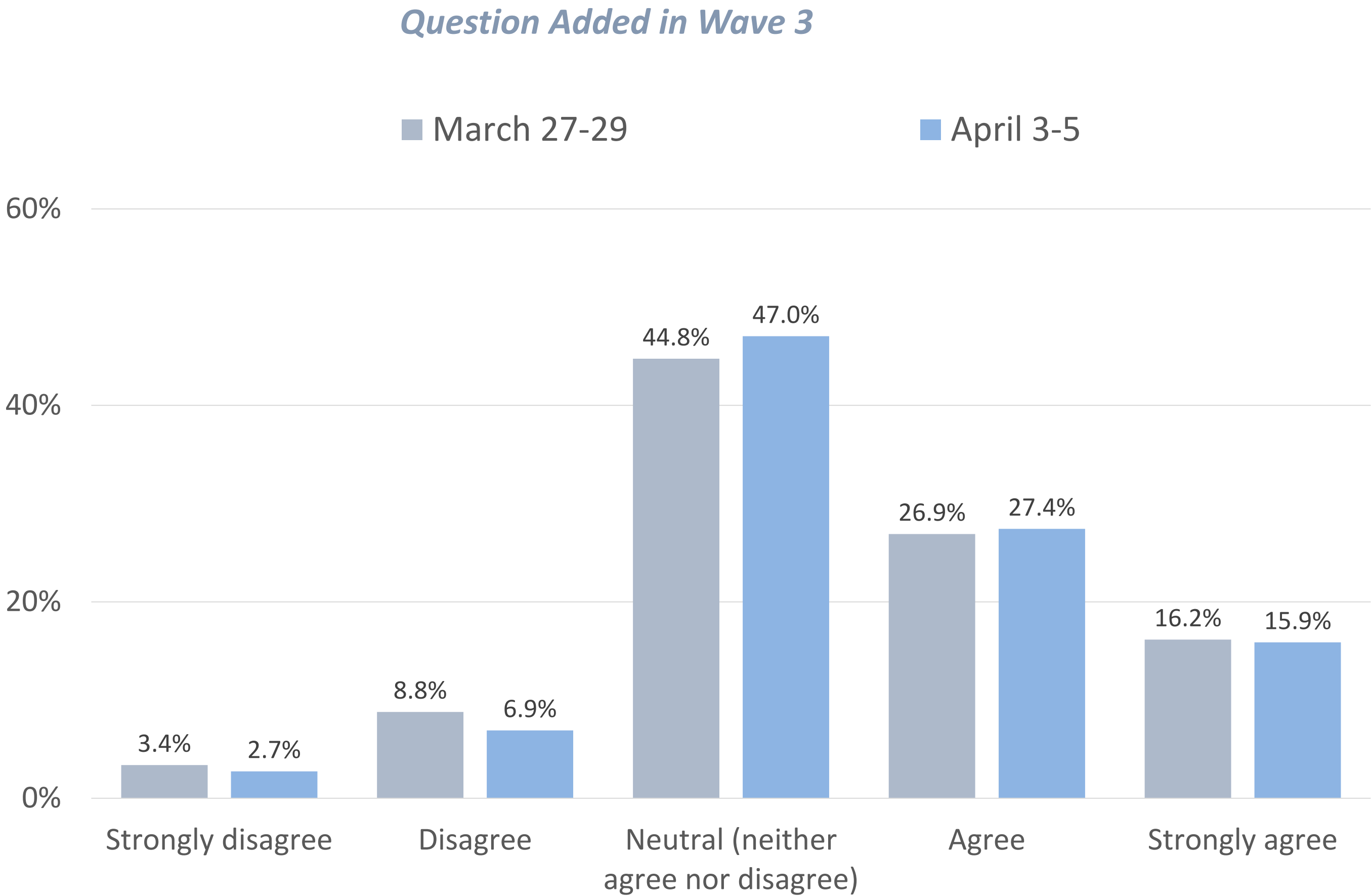
On Destinations Acting Quickly to Deal with Coronavirus

How much do you agree with the following statement?

Some U.S. States and destinations acted more rapidly than others in making preparations and putting in travel restrictions and shelter in place orders.

Statement: When the coronavirus situation is resolved, I'll be more likely to visit places that acted rapidly than those that acted more slowly.

(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

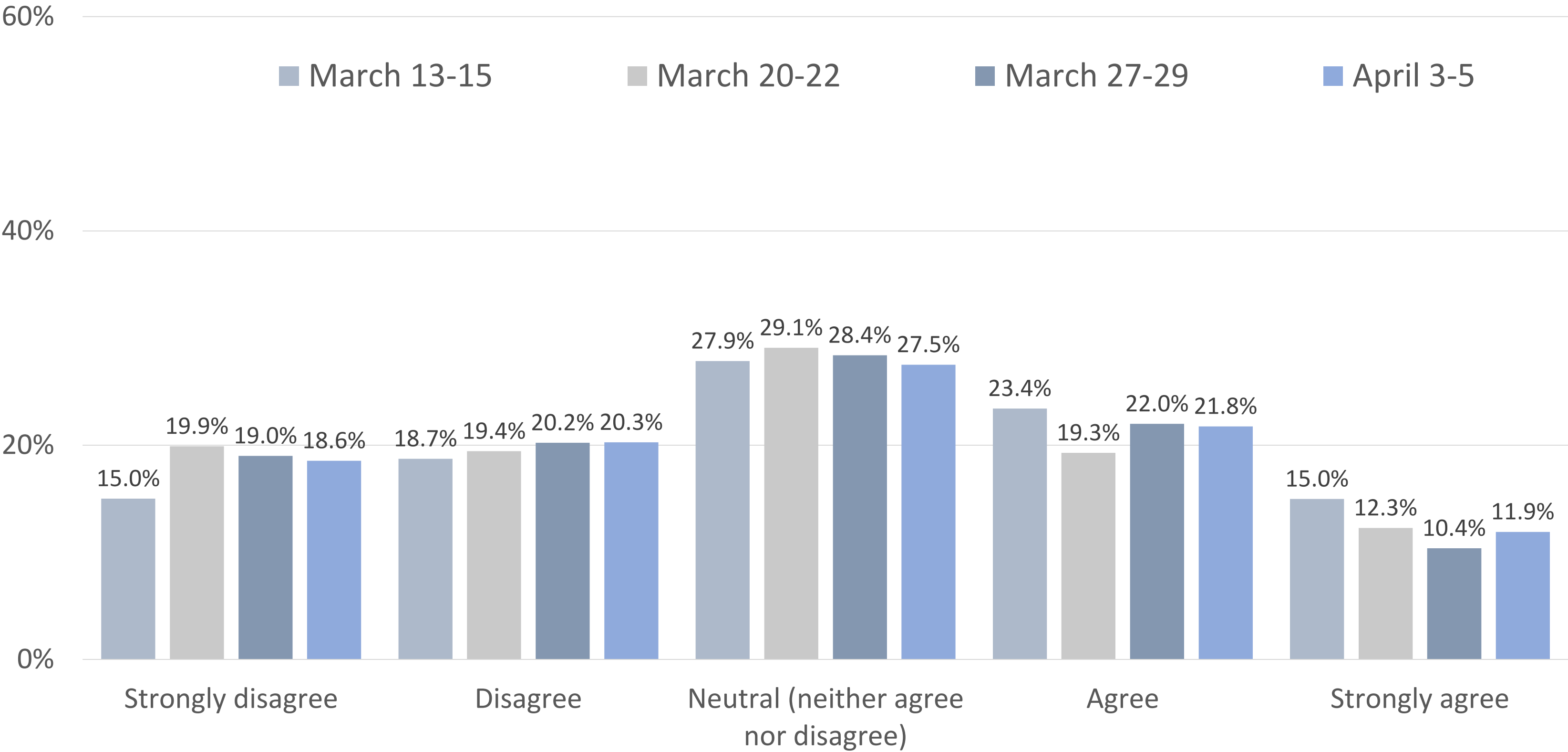


Discounts and Price Cuts

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 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)

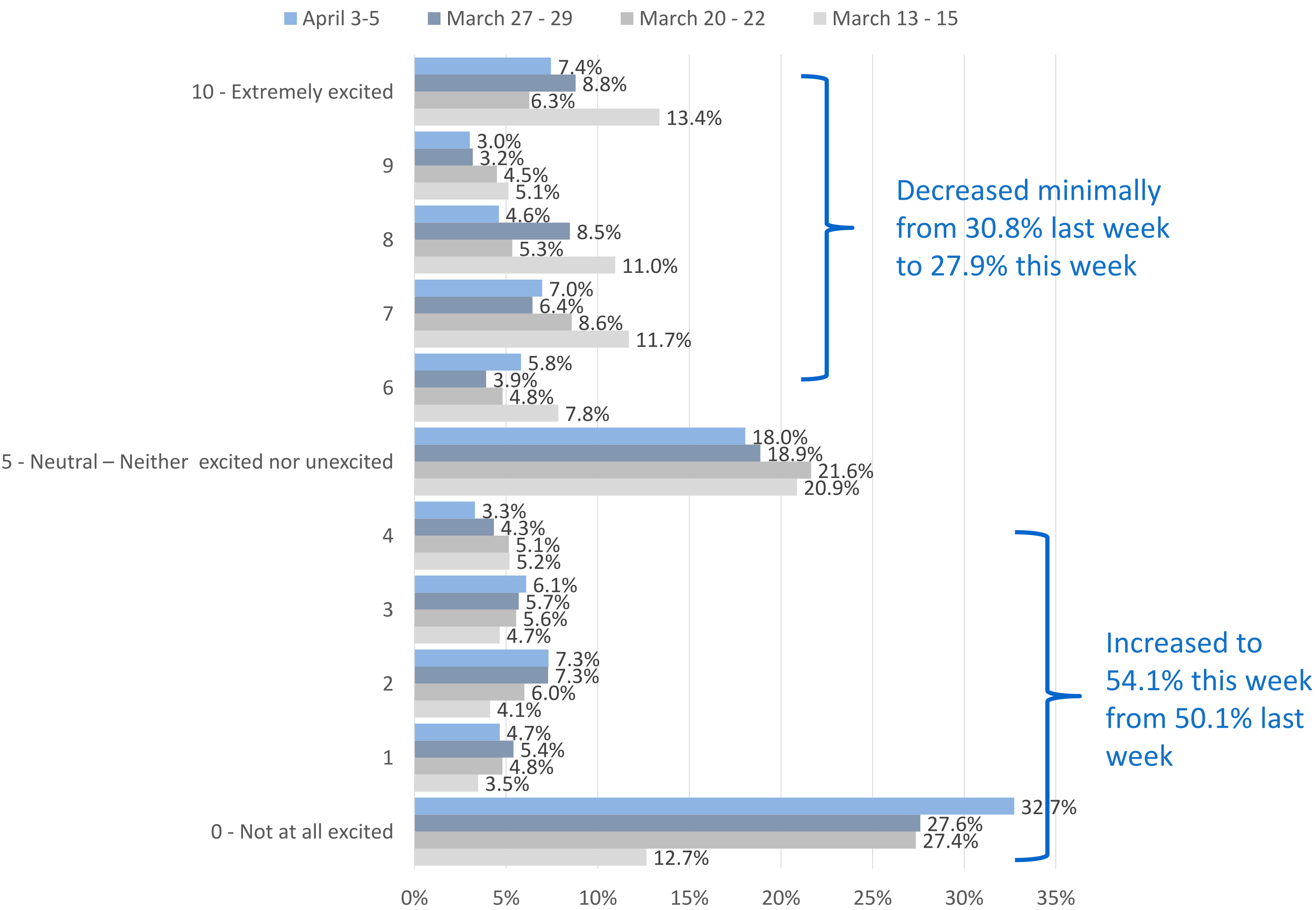


Excitement to Travel Now

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)

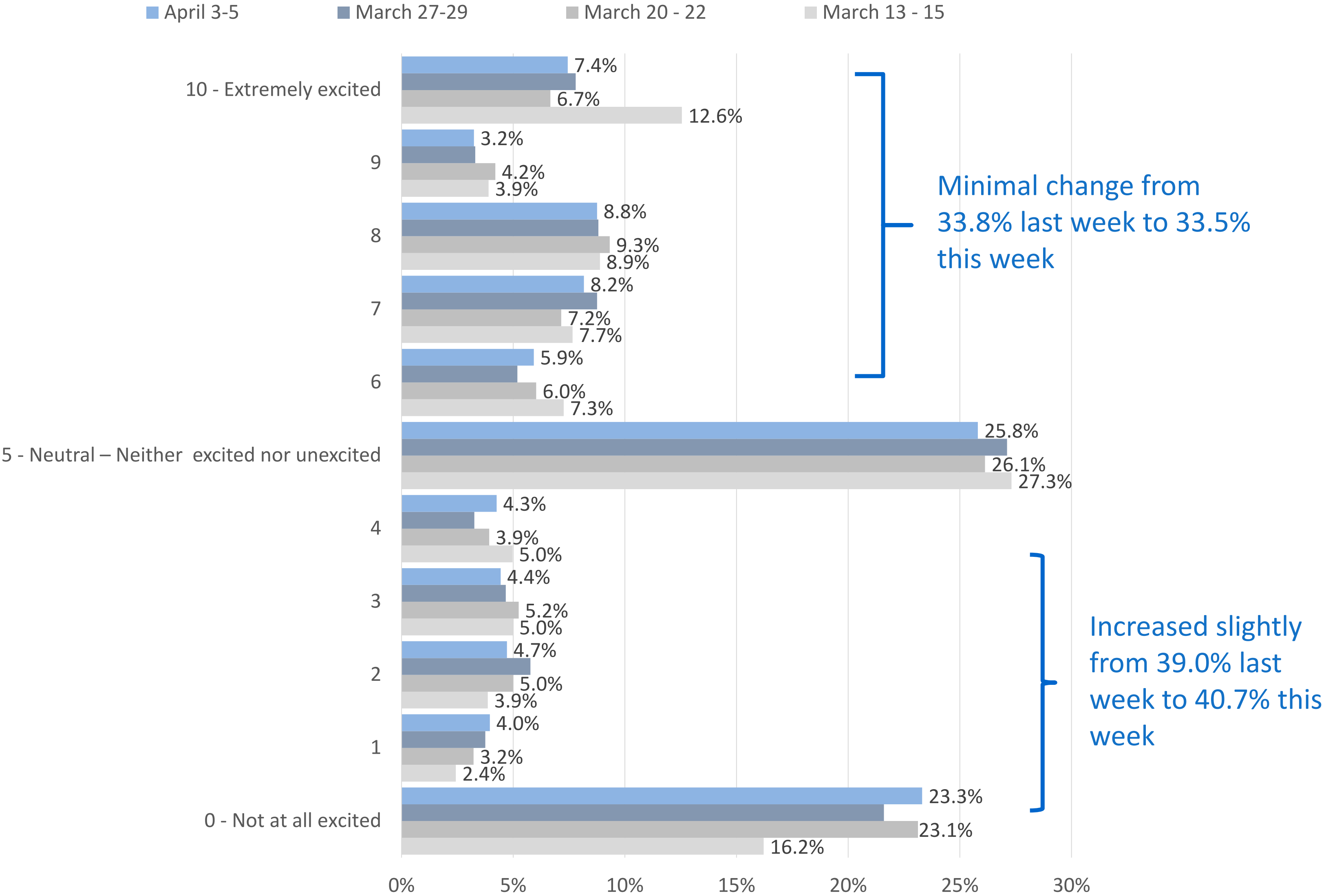
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)



Openness to Travel Information

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

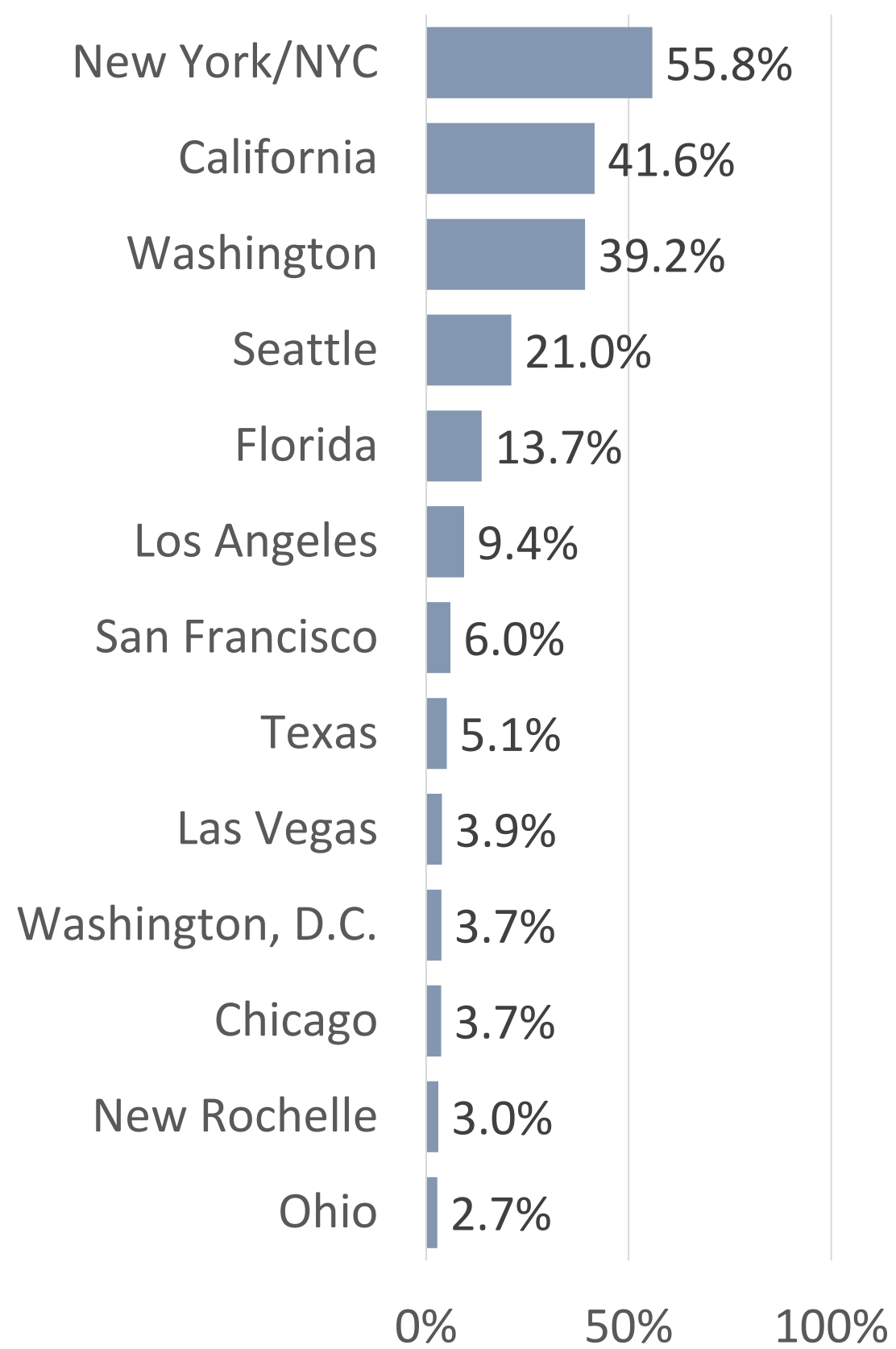
(Base: All respondents, 1,201, 1,200, 1,201 and 1,216 completed surveys. Data collected March 13-16, 20-22, 27-29 and April 3-5, 2020)



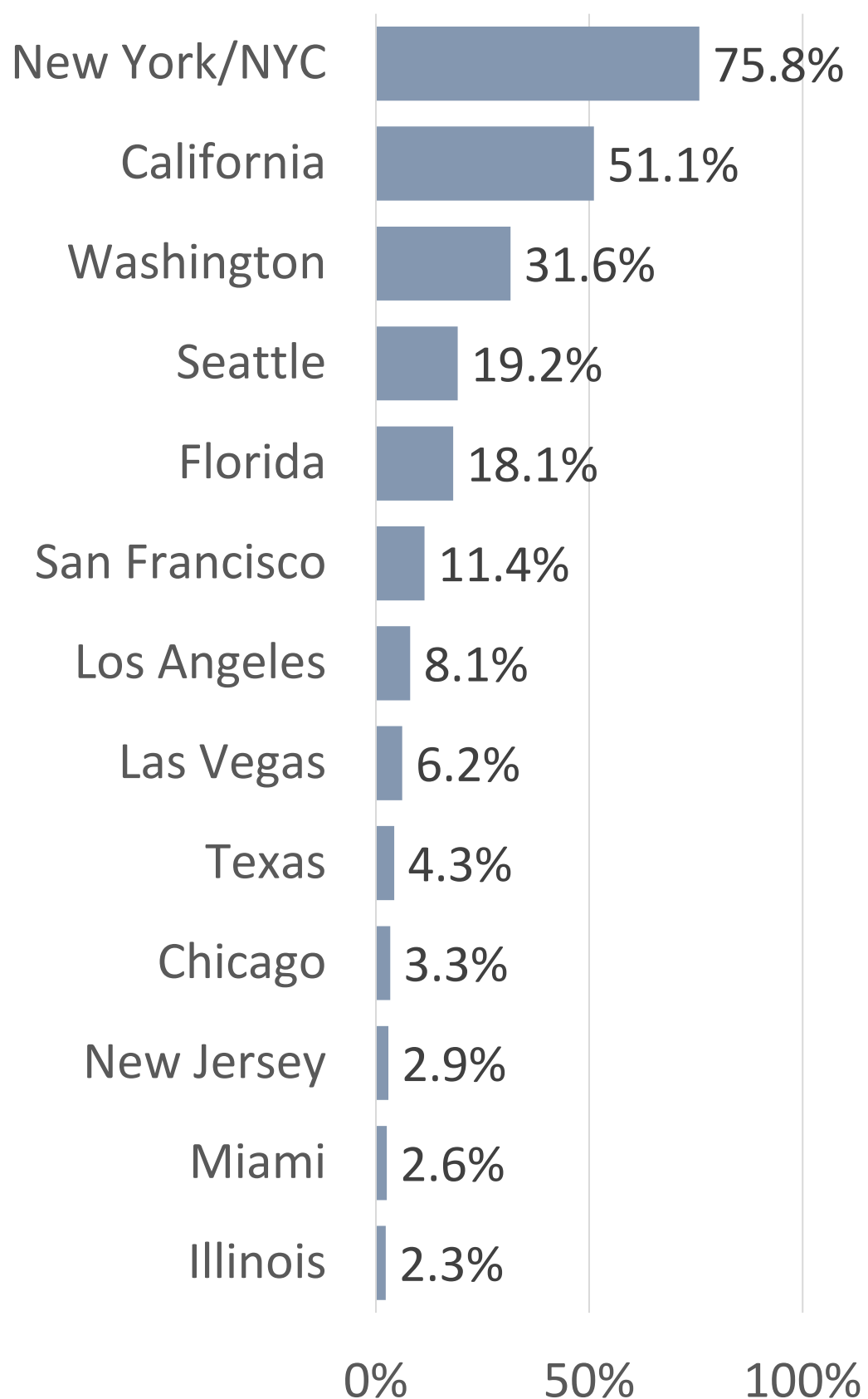
Most Talked About Coronavirus Hotspots

Question: What are the THREE (3) U.S. travel destinations (if any) that have been most talked about as places with Coronavirus issues?

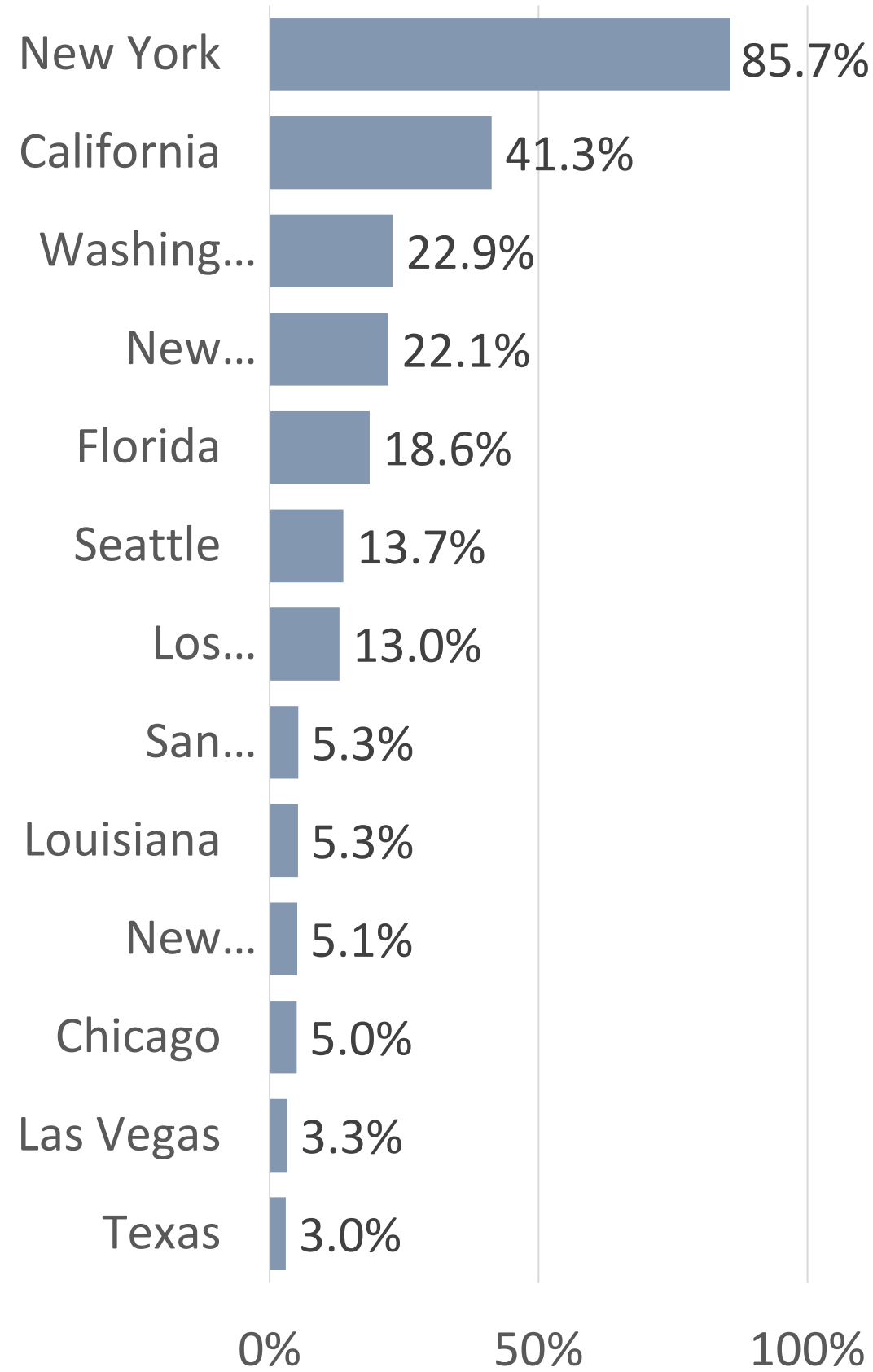
Wave 1 (March 15-17)



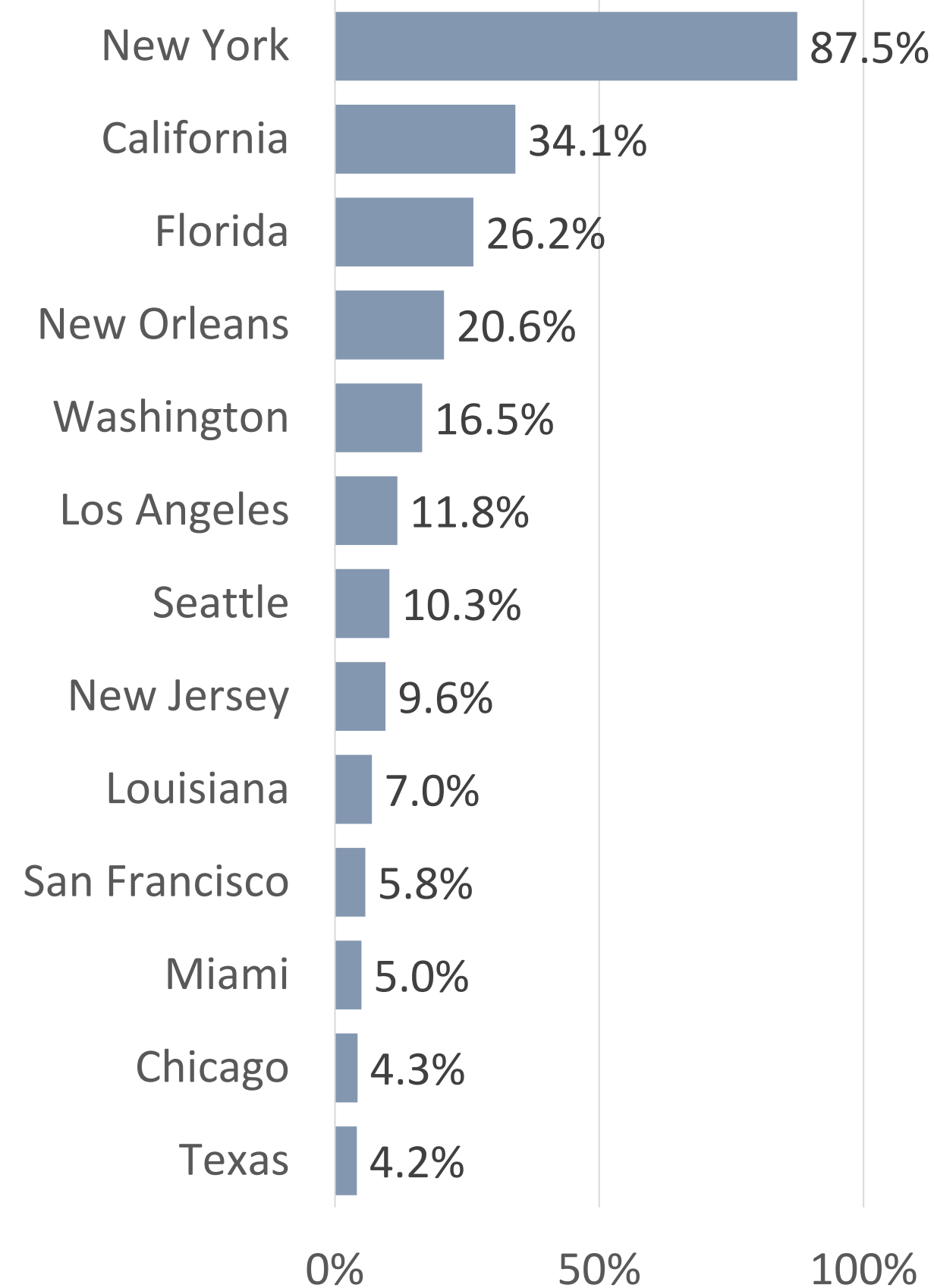
Wave 2 (March 20-22)



Wave 3 (March 27-29)



Wave 4 (April 3-5)



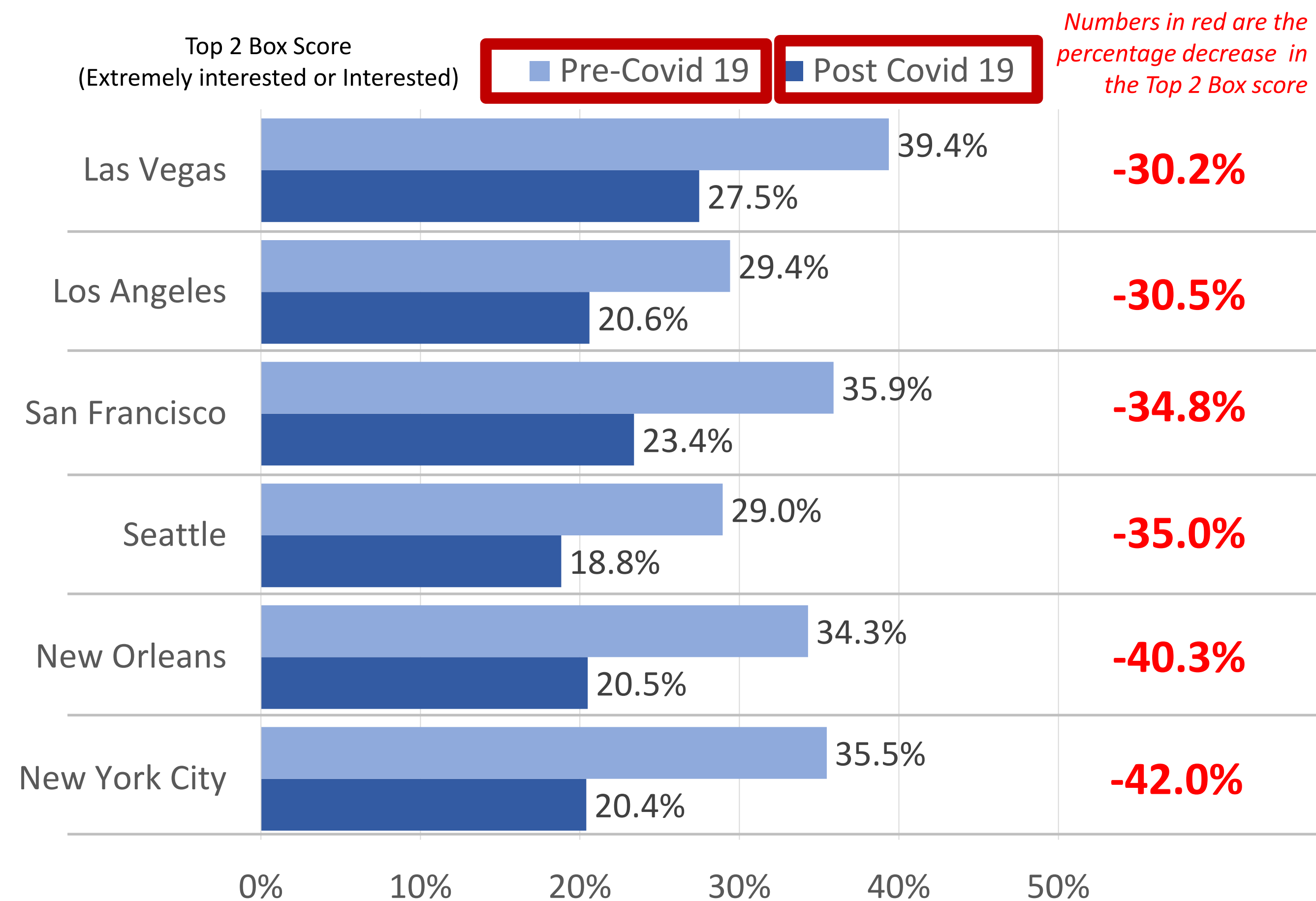
Impact of Coronavirus on Destination Interest

Question 1: Please think back to a few months ago -- JUST PRIOR TO THE CORONAVIRUS SITUATION.

At that time, how interested would you say you were in visiting each of these destinations sometime during 2020.

Question 2: Now please imagine the period of time immediately after the coronavirus situation blows over.

How interested will you likely be in visiting these destinations in the SIX (6) MONTHS immediately after the coronavirus situation blows over.



(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

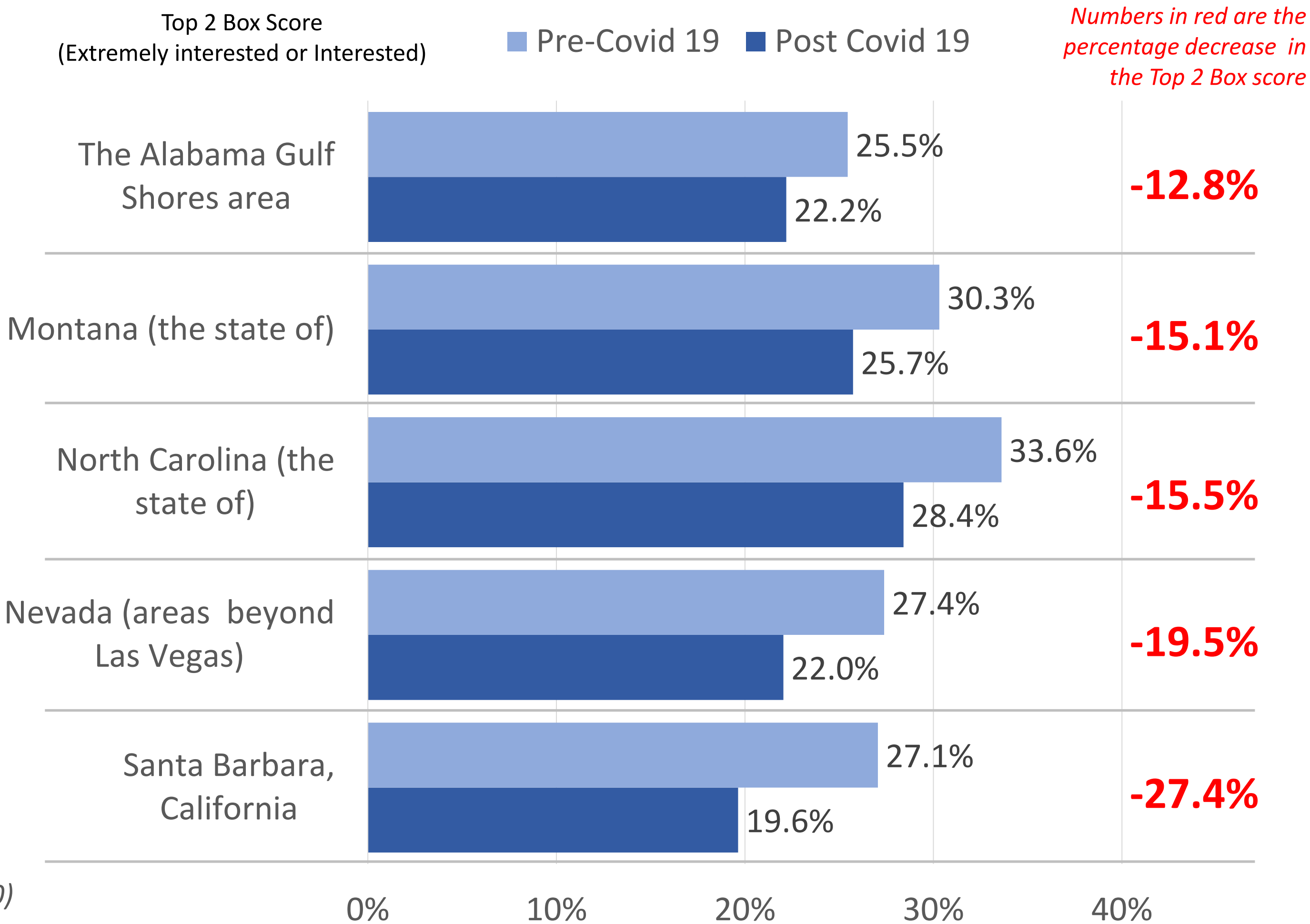
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How interested will you likely be in visiting these destinations in the SIX (6) MONTHS immediately after the coronavirus situation blows over.

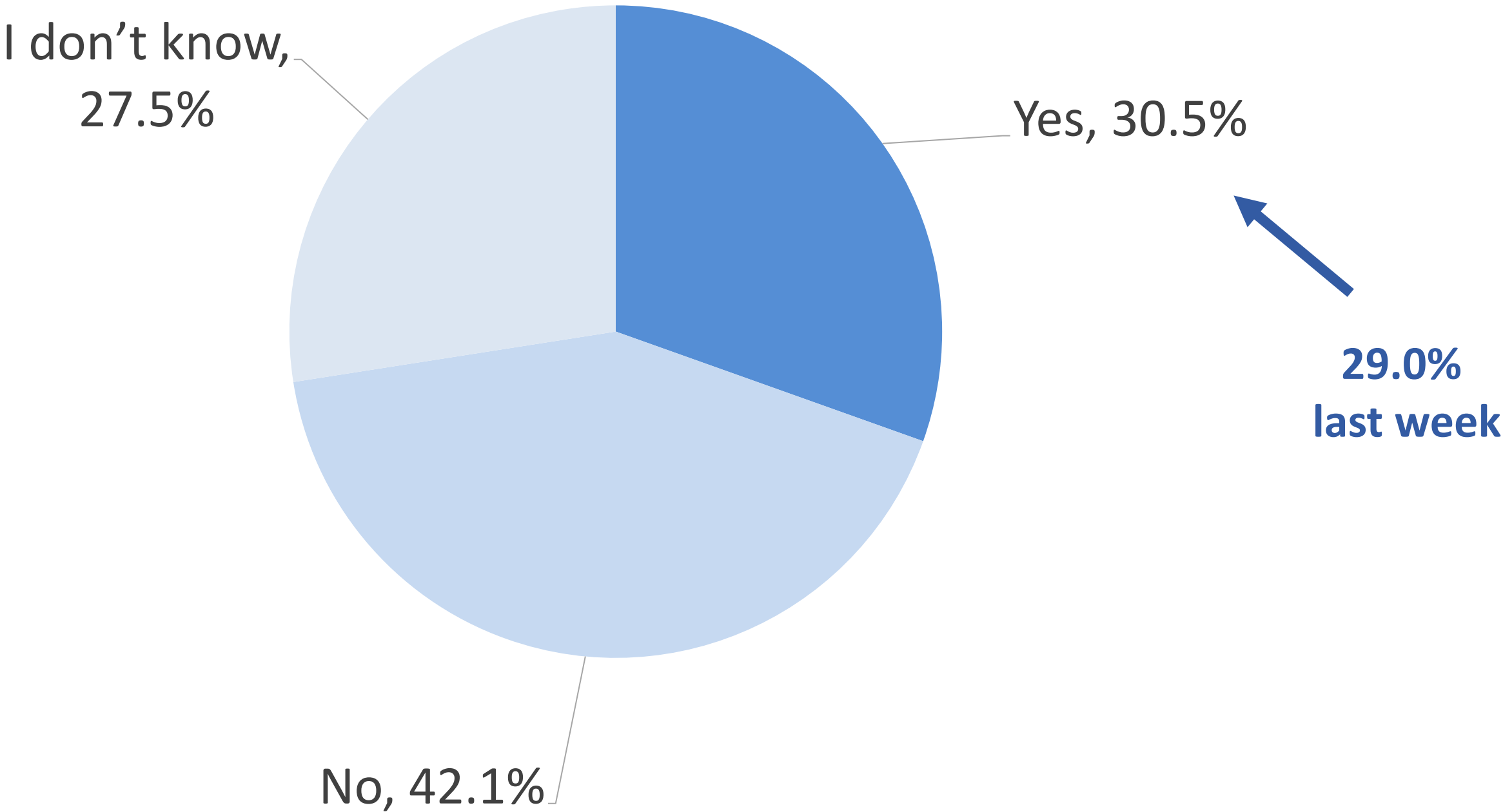


(Base: All respondents, 1,216 completed surveys. Data collected April 3-5, 2020)

Changes in Travel After The Coronavirus Crisis

True or False: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit?

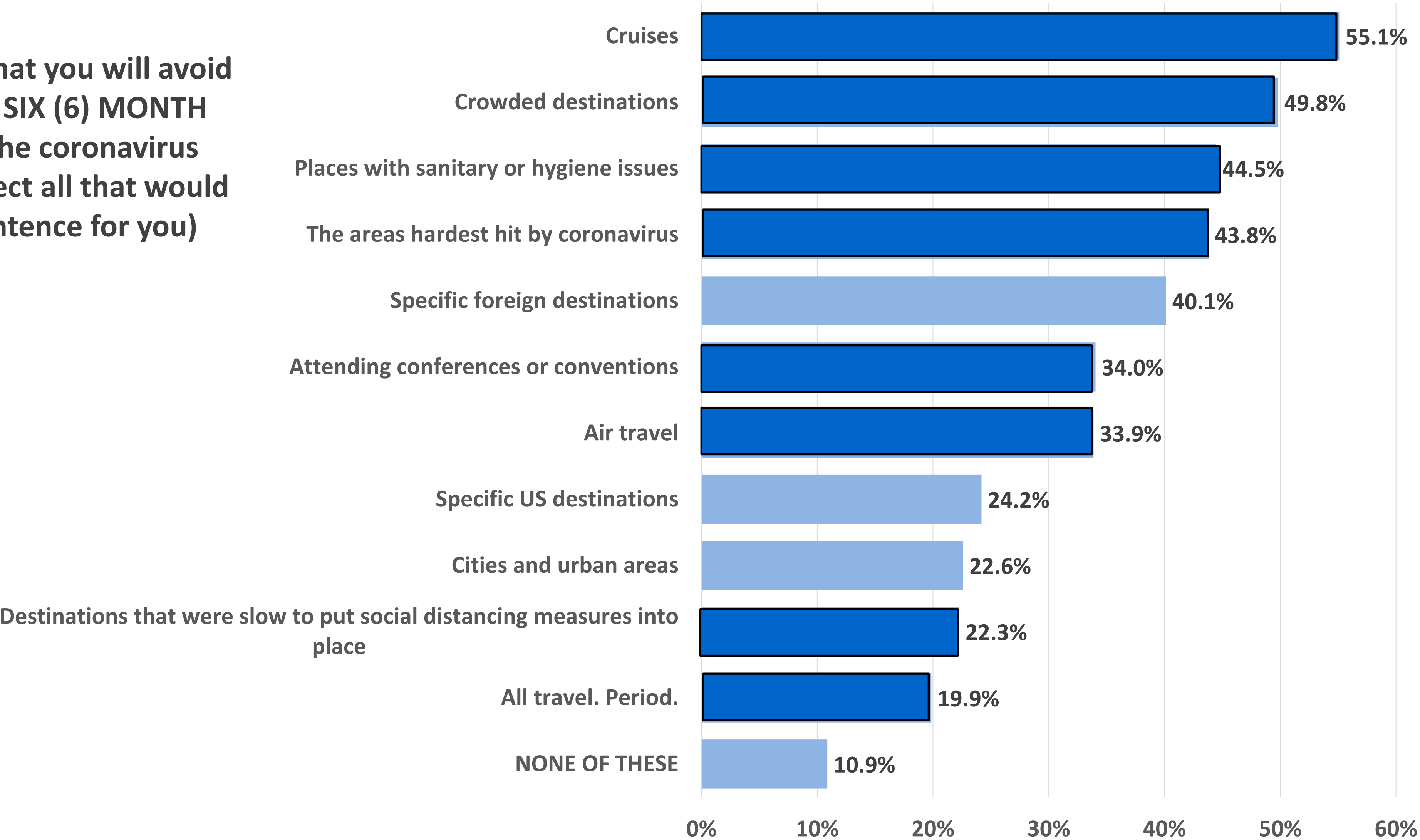
(Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)



Changes in Travel After The Coronavirus Crisis: Aided

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 _____.

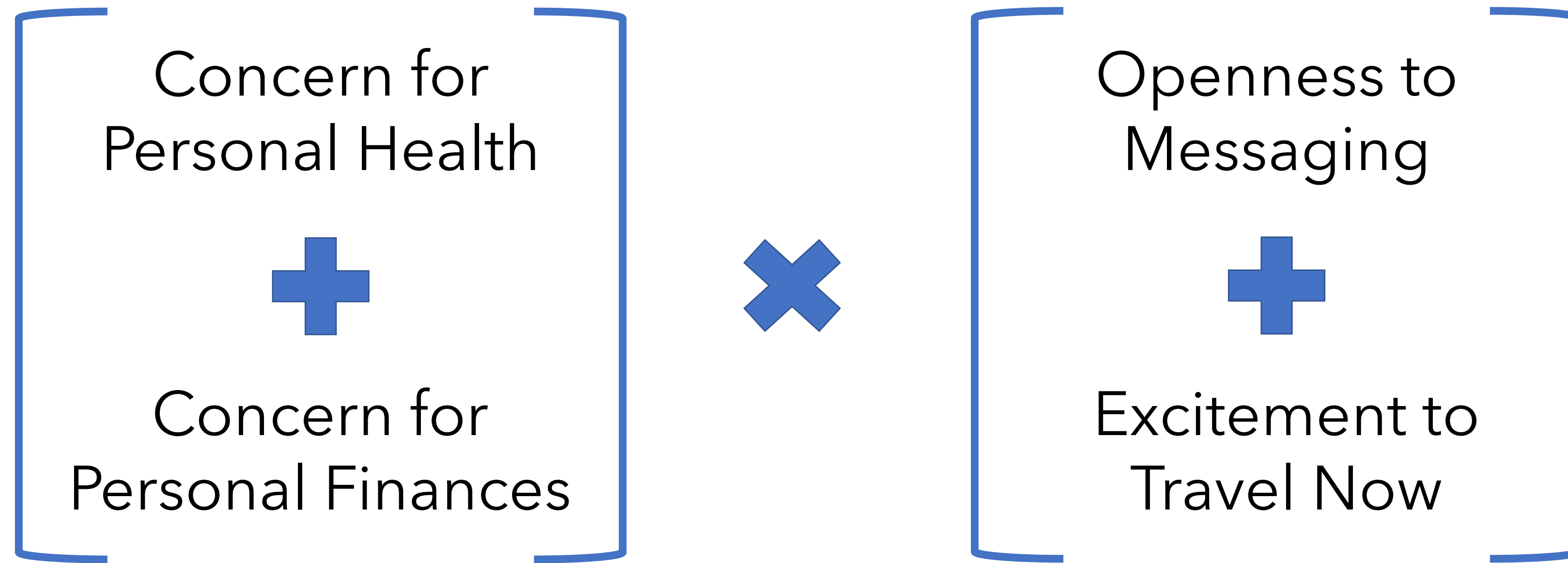




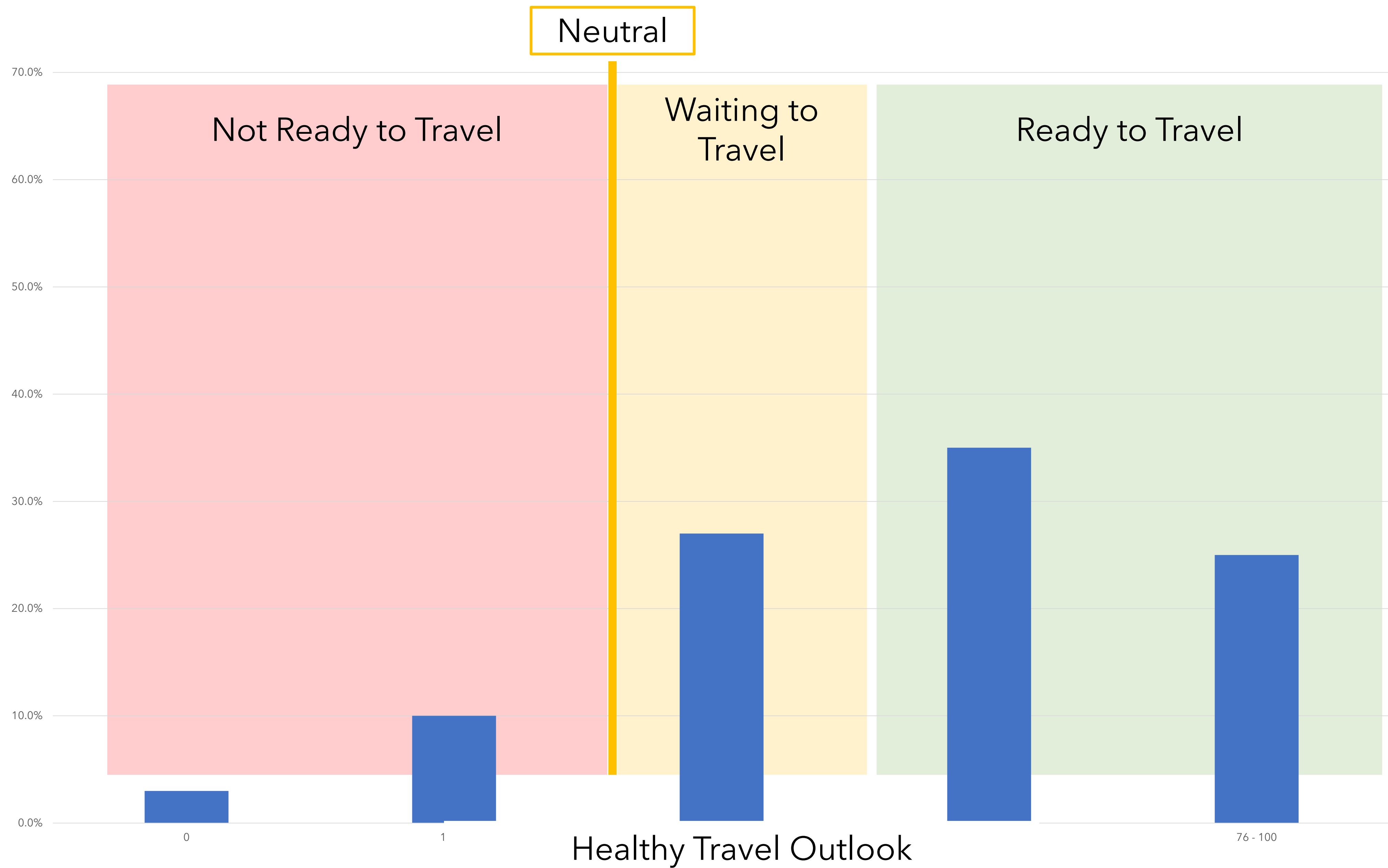
Coronavirus Travel Marketing Potential Influence Index

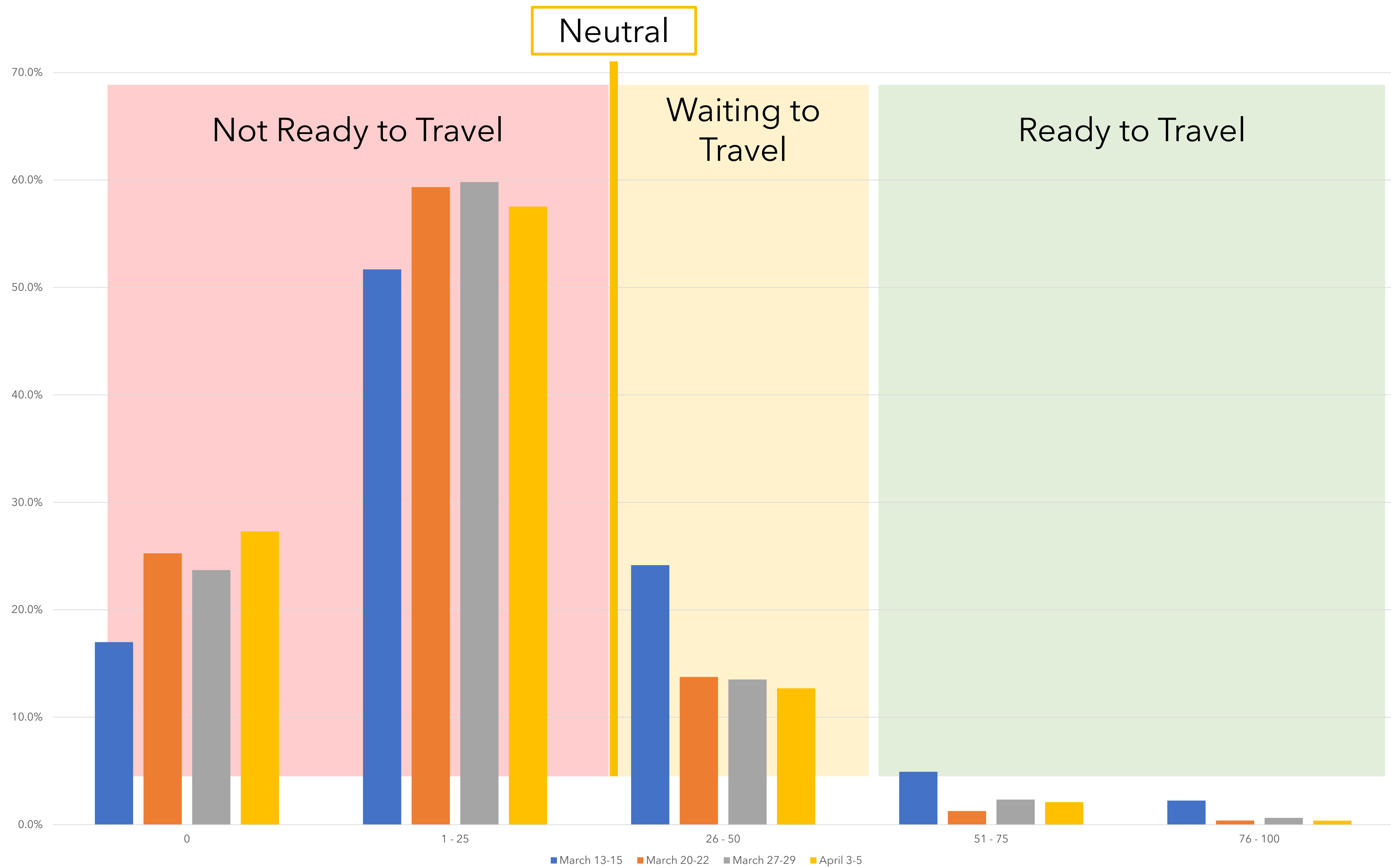
Week 4 Summary

Raw Index Formula



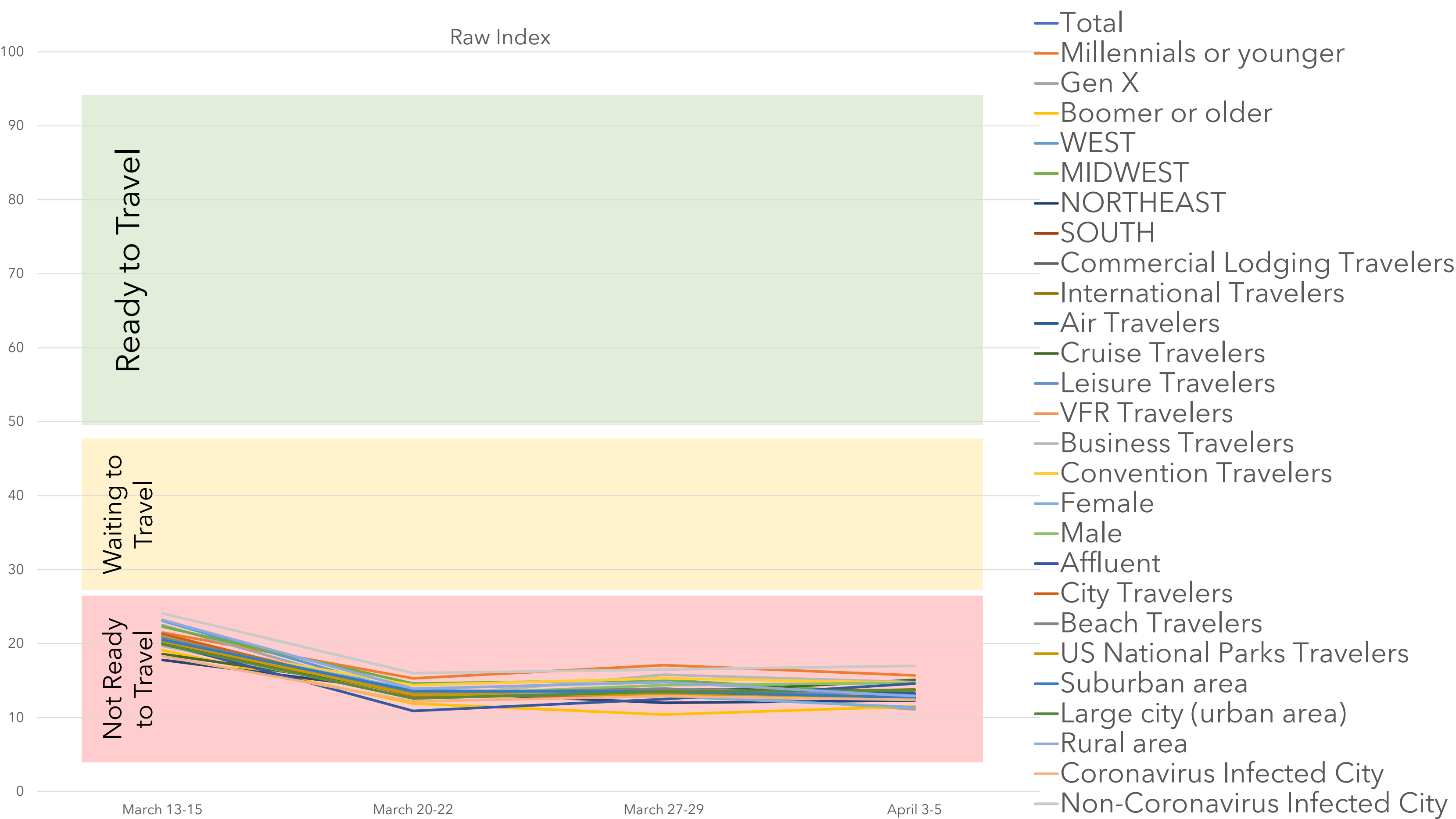
*Normalized to a 100pt scale



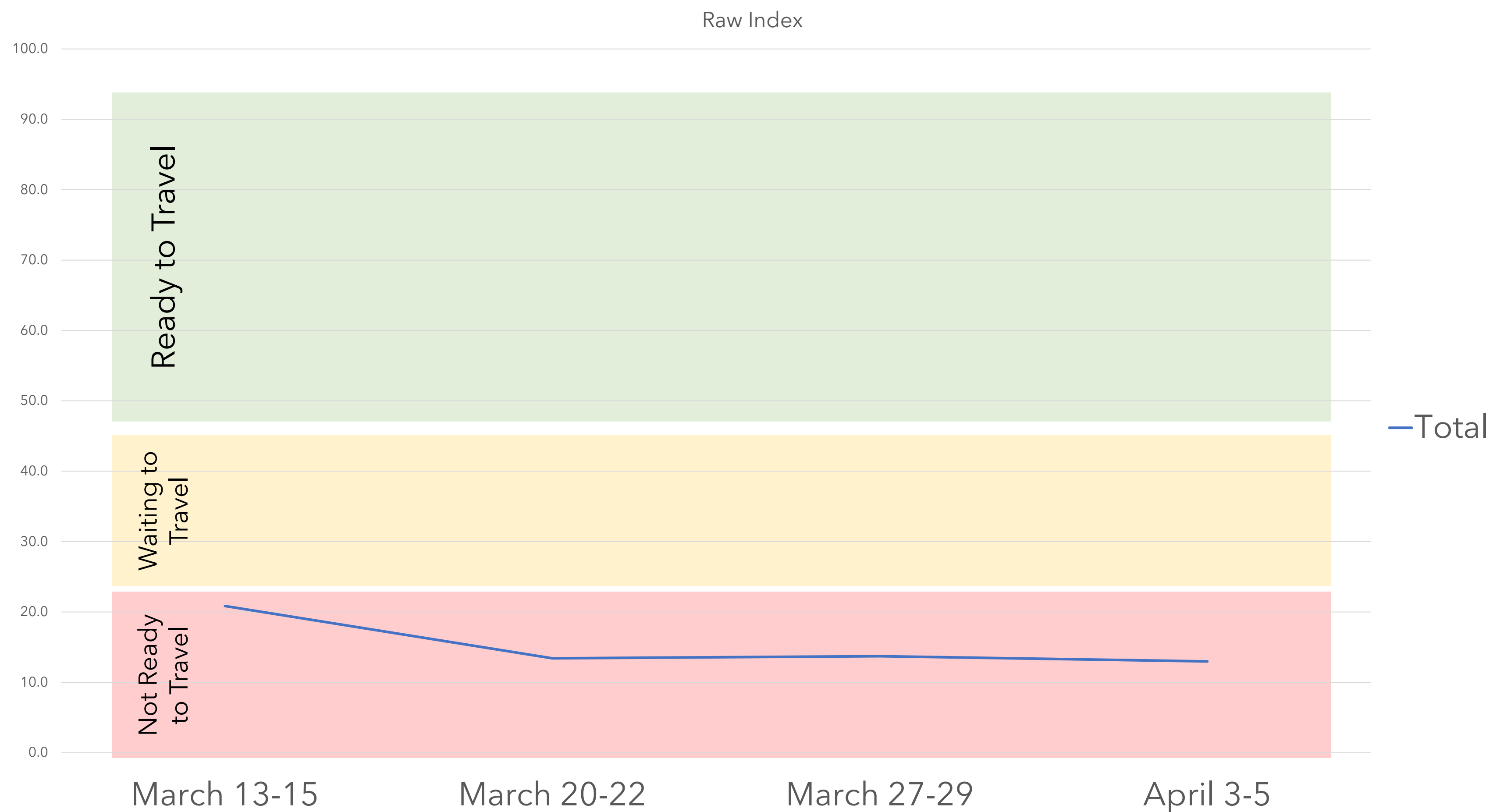


Raw Index Charted

	March 13-15	March 20-22	March 27-29	April 3-5
Total	20.9	13.4	13.7	13.0
Millennial or Younger	21.5	15.3	17.1	15.7
Gen X	22.5	12.7	13.5	11.1
Boomers or Older	19.1	11.9	10.4	11.5
WEST	23.1	13.2	13.6	12.5
MIDWEST	22.3	14.6	15.1	13.1
NORTHEAST	17.8	13.5	12.0	12.3
SOUTH	20.0	12.8	13.8	13.7
Commercial Lodging Travelers	21.1	12.8	13.7	13.0
International Travelers	20.4	12.8	13.1	13.8
Air Travelers	21.1	13.1	13.7	13.3
Cruise Travelers	18.6	13.7	13.3	15.1
Leisure Travelers	21.0	13.4	13.9	13.0
VFR Travelers	20.7	13.5	13.5	12.8
Business Travelers	19.7	12.7	15.8	14.8
Convention Travelers	20.2	14.4	15.3	14.7
Female	20.4	13.8	12.9	11.4
Male	21.1	13.0	14.4	14.7
Affluent	20.1	10.9	12.5	14.6
City Travelers	21.3	12.9	13.1	12.7
Beach Travelers	20.8	13.3	13.9	12.6
US National Parks Travelers	20.3	13.1	13.1	12.4
Suburban area	20.5	13.6	13.5	12.7
Large city (urban area)	19.9	12.6	13.5	13.7
Rural area	23.2	13.9	14.8	12.9
Coronavirus Infected City	18.3	12.2	12.9	12.4
Non-Coronavirus Infected City	24.1	16.0	16.5	17.0



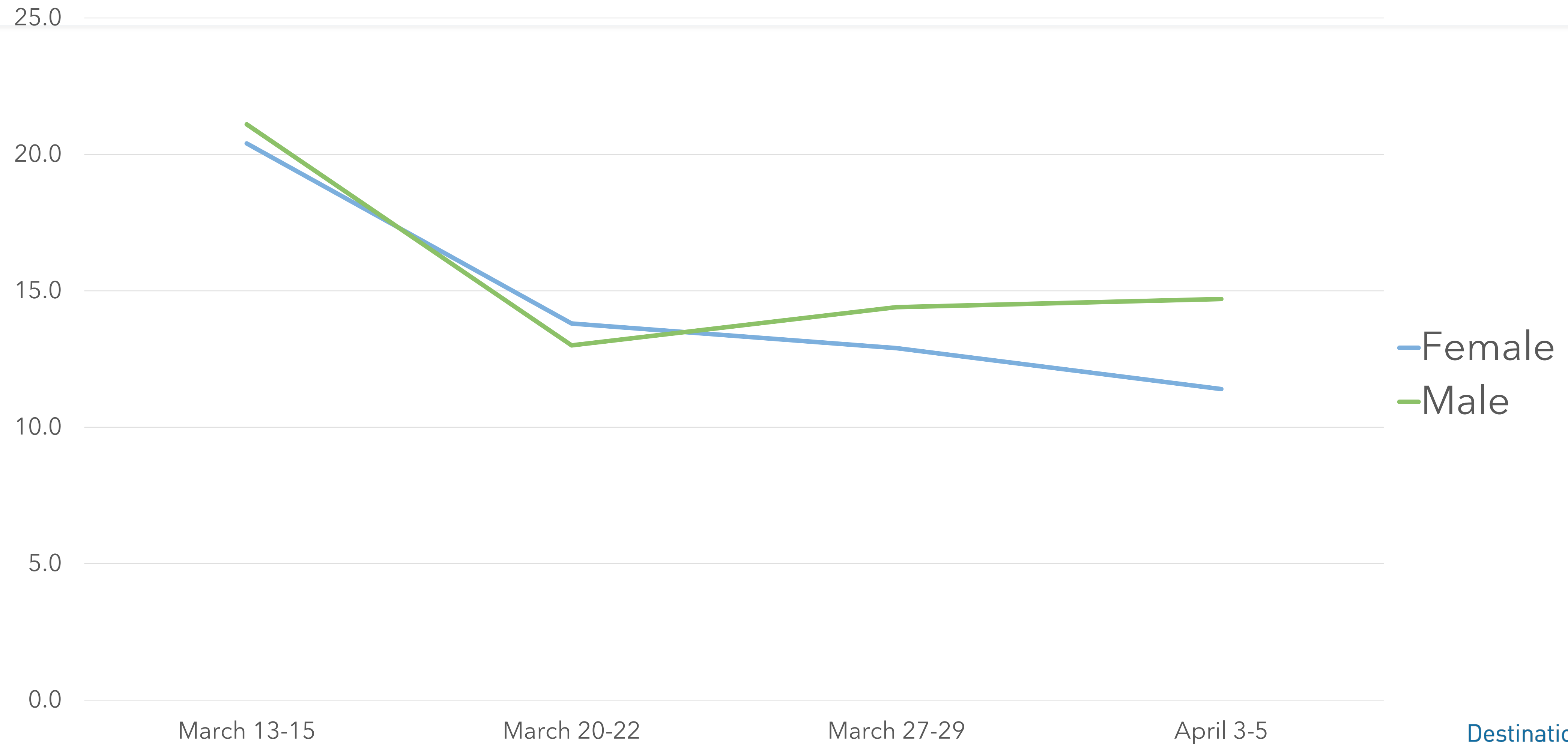
Raw Index Charted



Gender

Points of Interest Impacting Index Scores:

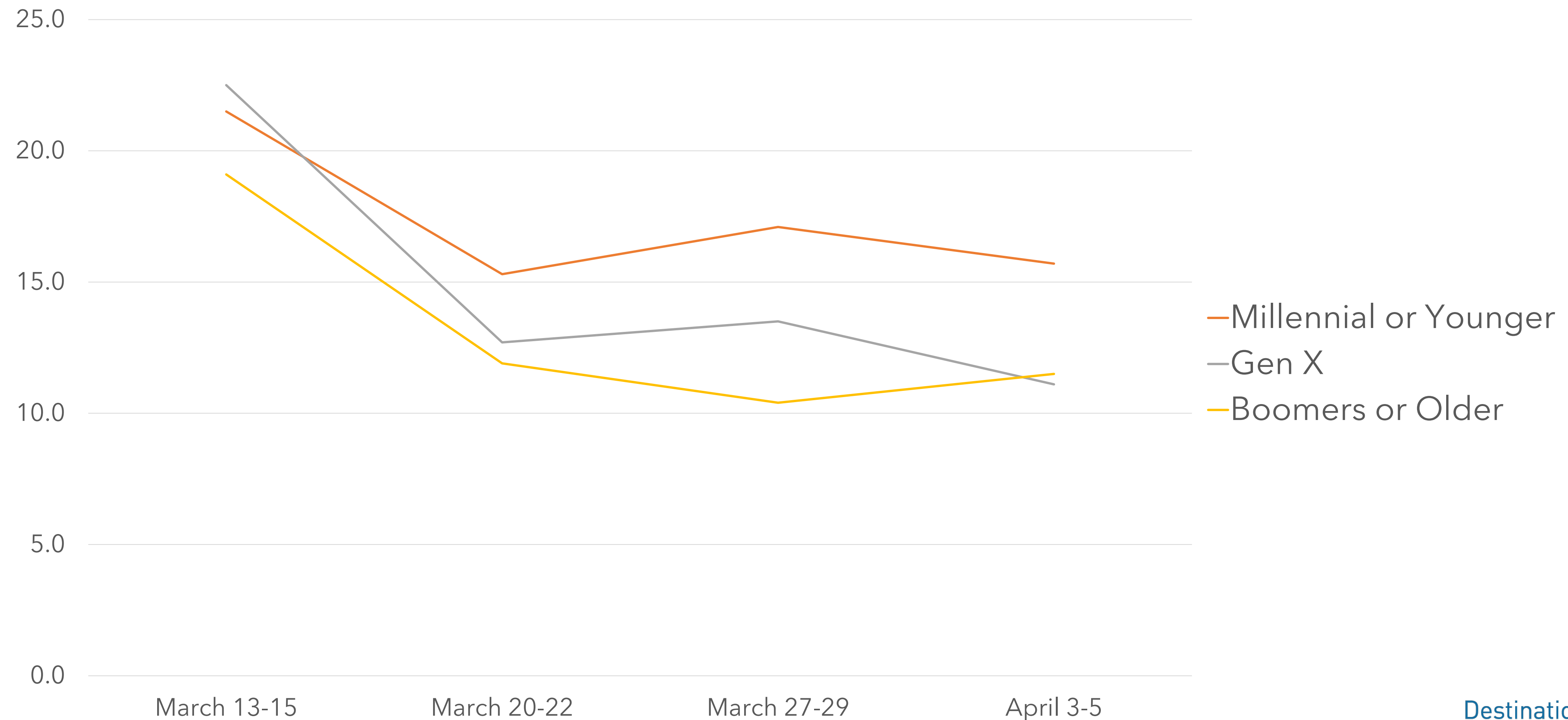
- Women in recent waves report higher levels of personal concern for contracting the virus as well as concern for personal finances
- Men more likely to report travel impacted by coronavirus
- Men more likely to report having canceled international and business trips
- Women more likely to say, "I have no plans to travel in 2020" in most recent wave



Generations

Points of Interest Impacting Index Scores:

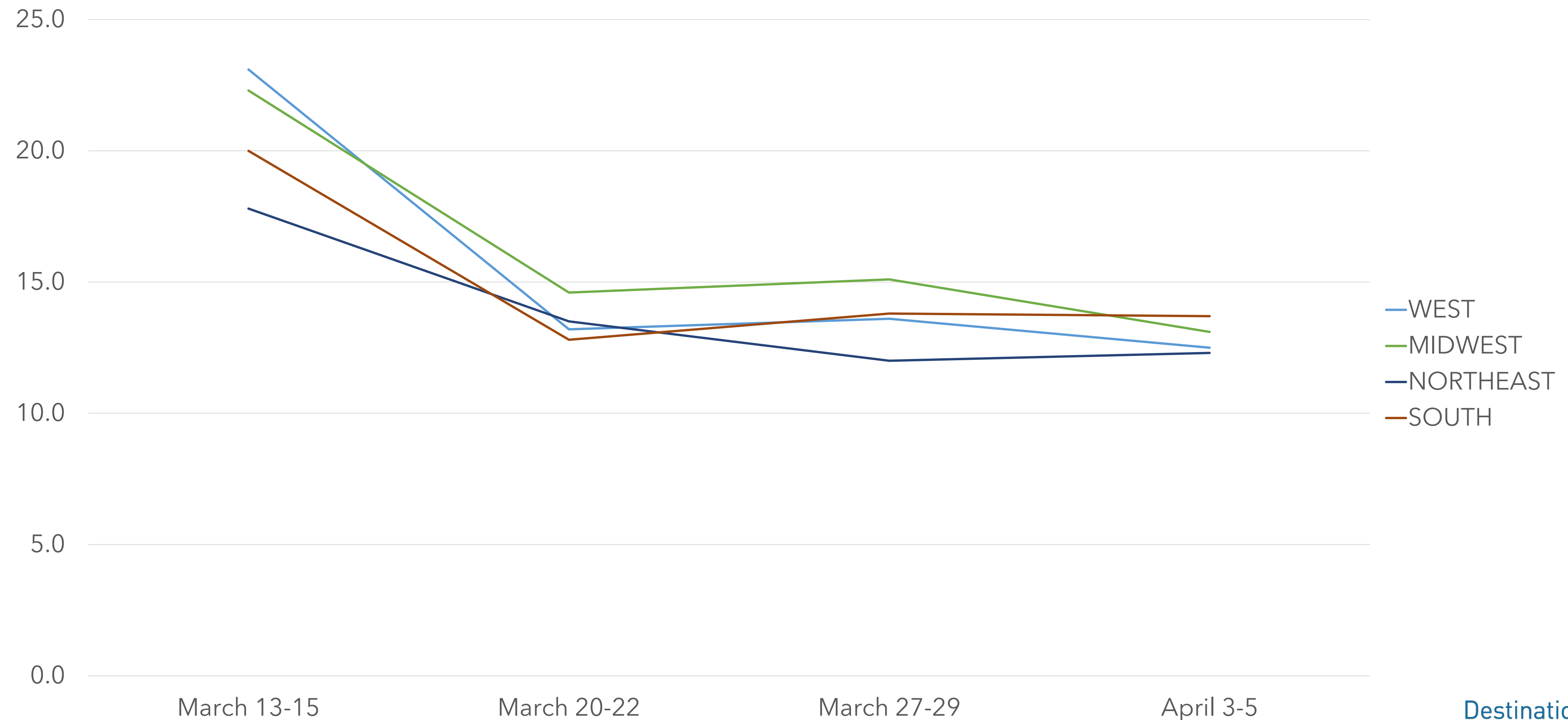
- Boomers experienced the largest spike in personal concern for contracting the virus between waves 2 & 3
- Gen X is consistently more concerned about personal finances than the other generations
- All generations are concerned about safety, but Boomers were significantly more concerned about passing the virus on to others
- Millennials show the relatively highest openness to messaging about travel.



US Regions

Points of Interest Impacting Index Scores:

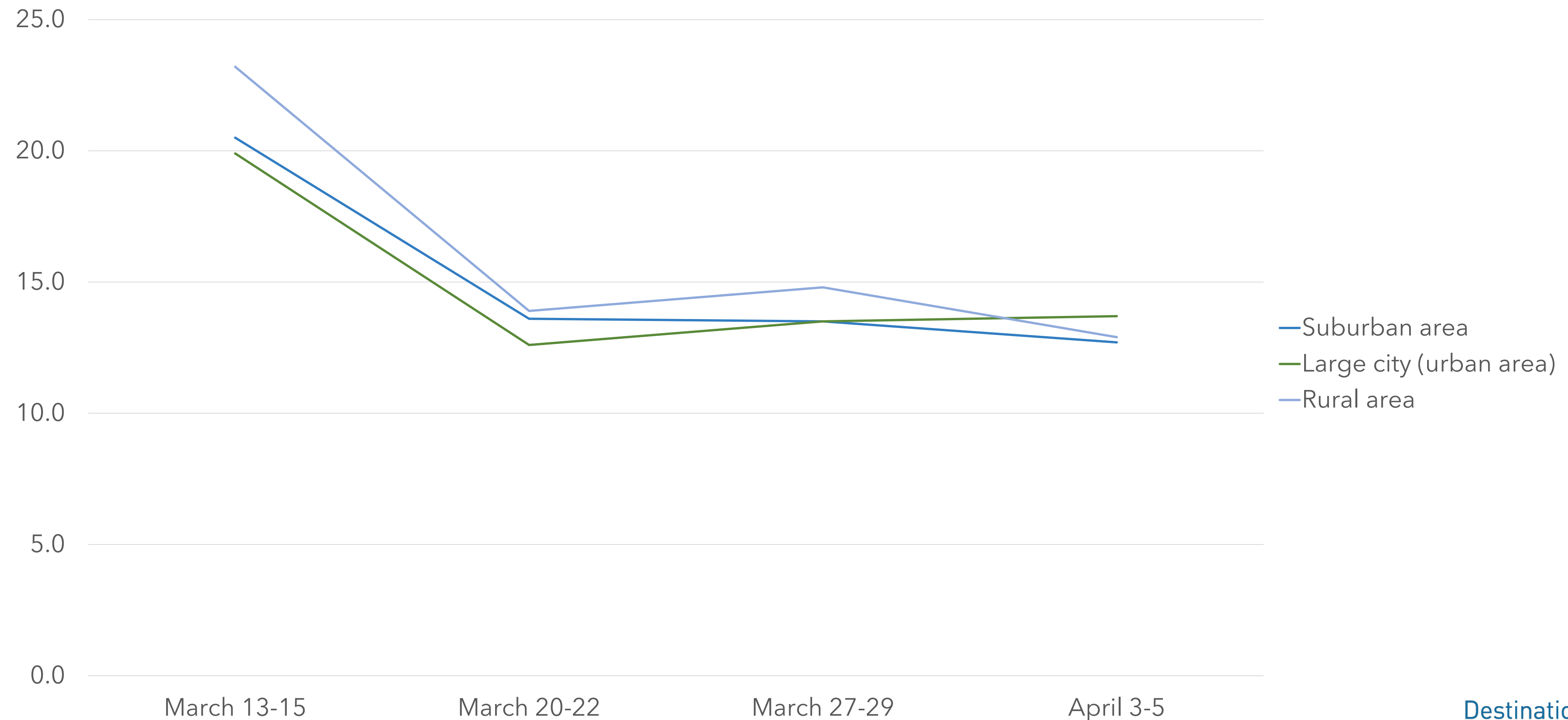
- Northeast shows highest levels of personal concern for contracting the virus in most recent waves
- Northeast also most likely to have canceled a trip in most recent waves
- South in recent waves shows relatively most openness to travel messaging compared to West's least openness to messaging.



Type of Residence

Points of Interest Impacting Index Scores:

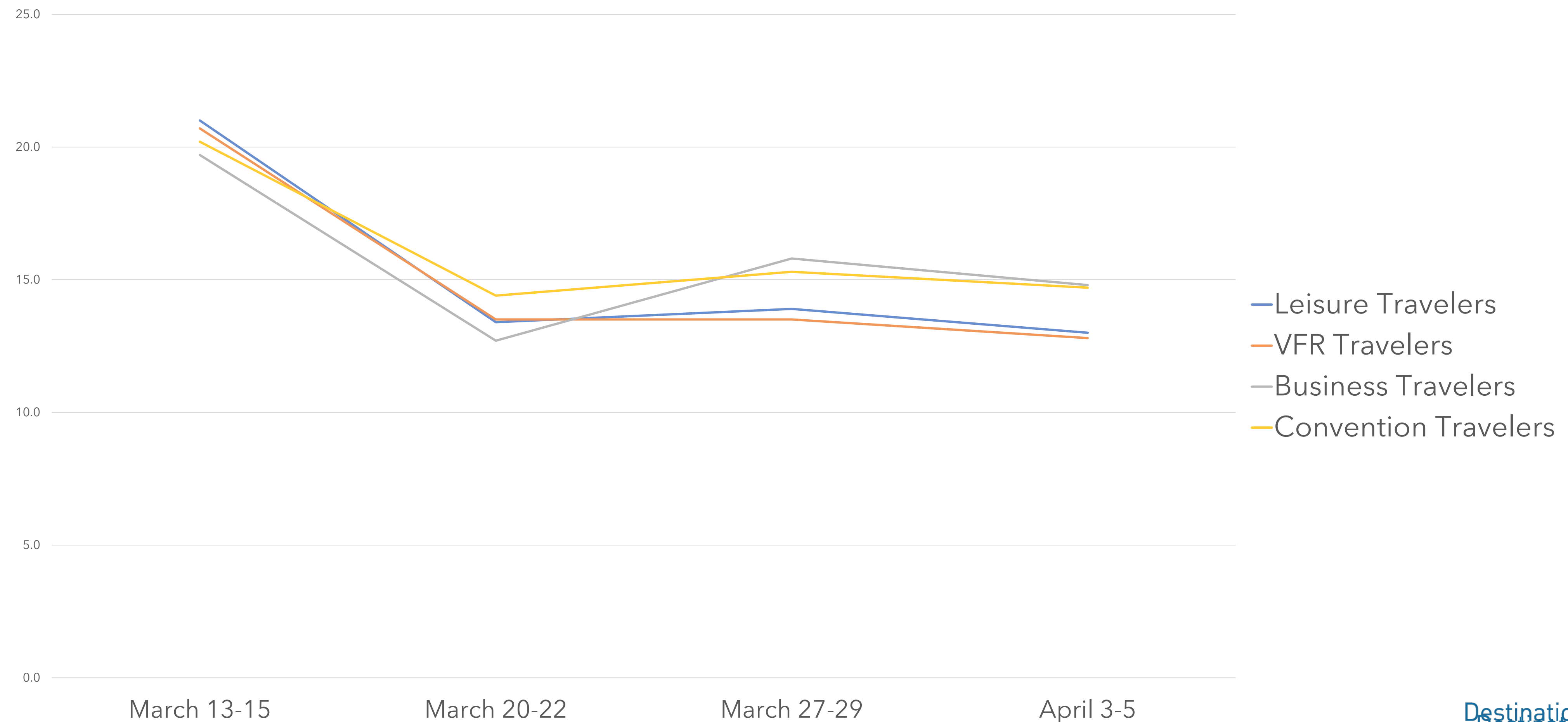
- Interestingly similar levels of concern for personal safety and personal finances in most recent waves across residence types
- Openness to travel messaging decreasing for all, but relatively highest for large city, urban residents



Type of Traveler

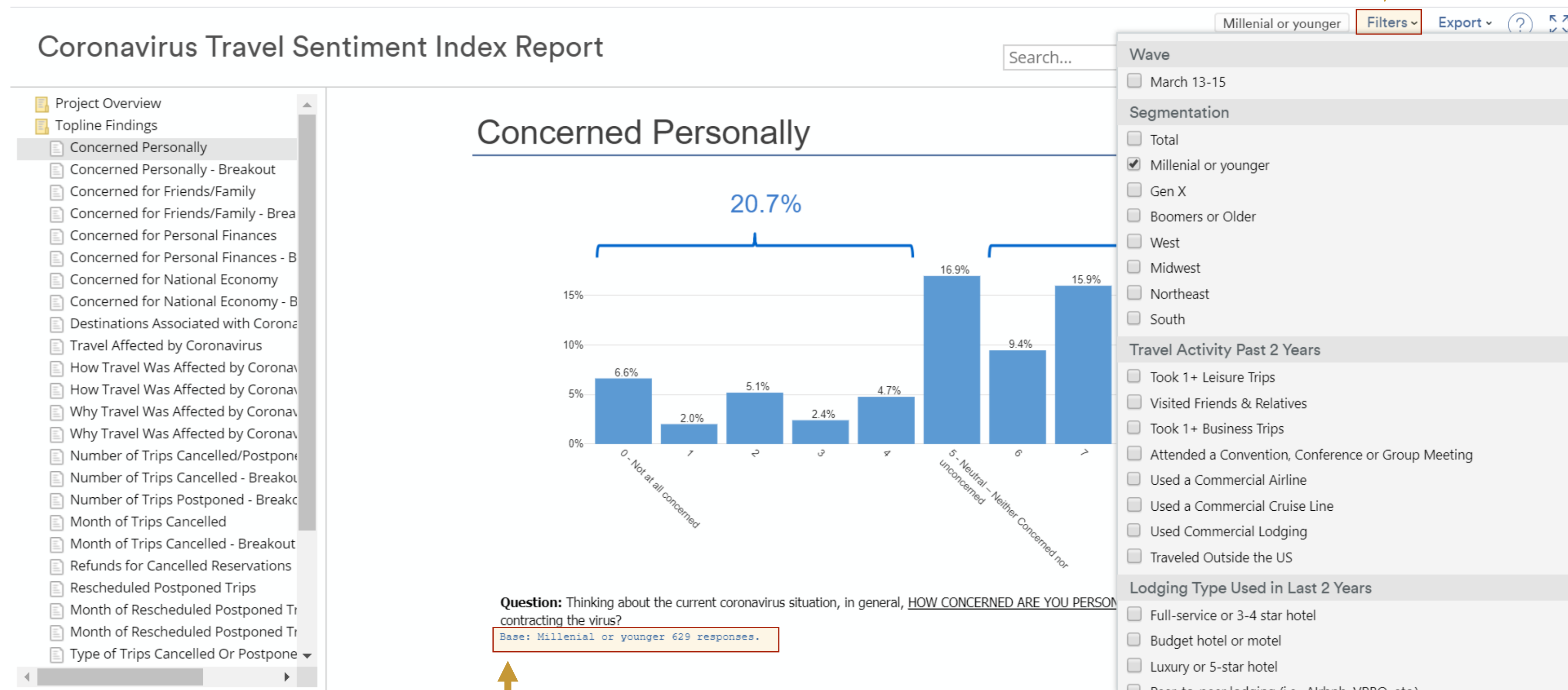
Points of Interest Impacting Index Scores:

- Leisure and VFR travelers most likely to report personal safety concerns
- Business travelers unsurprisingly most likely to cite business restrictions/ employer mandates as reason for travel impact
- Business and Convention travelers report most openness to travel messaging
- Leisure and VFR travelers report least excitement to travel "now"



More Insights Available in our Online Dashboard (for Subscribers)

To segment the results by a specific group
(generational, geographical, etc.)
Click on "Filters" in the top right corner.



Next/Ongoing Updates



- Key Findings to Know released via email every Monday morning
- Complete Report of Findings sent (and dashboard updated) by each Tuesday morning
- Online Presentation of Findings every Tuesday at 8:00am PST/11:00am EST
- Shareable infographics and gifs week-daily



Upcoming for You

- Meeting Planner Sentiment Survey Findings
- Live Online Focus Group with Travelers
- [Let us know](#) if you would like us to make this Presentation for your Board of Directors or other stakeholders

The background image shows a person wearing a yellow long-sleeved shirt, sitting at a wooden table and using a laptop. The laptop screen displays a survey interface with the word "SURVEY" at the top, a magnifying glass icon over a list, and a "CLICK" button. Below the button, there is a link that says "click here to get more information".

DMO/Website IMPORTANCE STUDY [FREE TO PARTICIPATE]

***Measuring the importance of DMOs and their
marketing/communications assets in a period of crisis***

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