

## Coronavirus Travel Sentiment Index

Presentation of Findings—Week of April 13<sup>th</sup>

# 







#### **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.

Ĩ	
	Destination Analys



## Please consider purchasing, subscribing or donating to support this research <a href="https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/">https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/</a>

### **THANKYOU** so much to our clients and partners who have







## TODAY

Overview of Findings

Travel Marketing Potential Influence Index

Hear from Real Travelers: Panel Discussion

Questions + Answers



### 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 5 data (fielded April 9<sup>th</sup>-11<sup>th</sup>) 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

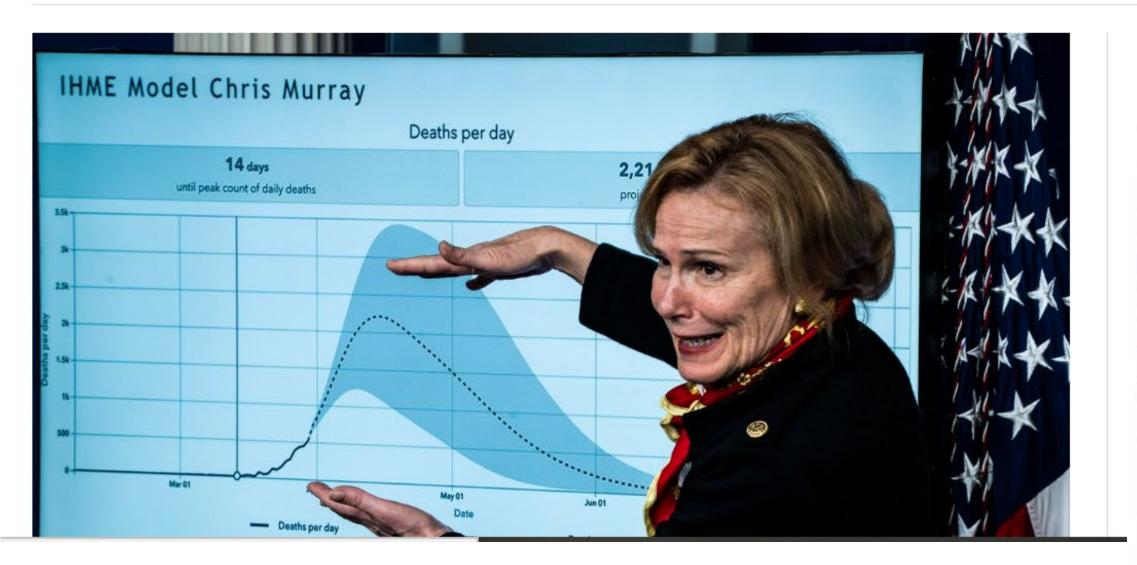
Vermont New Hampshire Massachusetts Rhode Island acticut sey

are and

n DC

#### Social distancing works. The earlier the better, California and Washington data show.

Two weeks into stay-at-home orders and business and school closures in the San Francisco Bay area and Washington state, there's evidence the curve of infections is flattening compared with other U.S. metro areas



#### Officials: Social distancing efforts appear to be working a should stay in place





and the second

## Personal Concerns

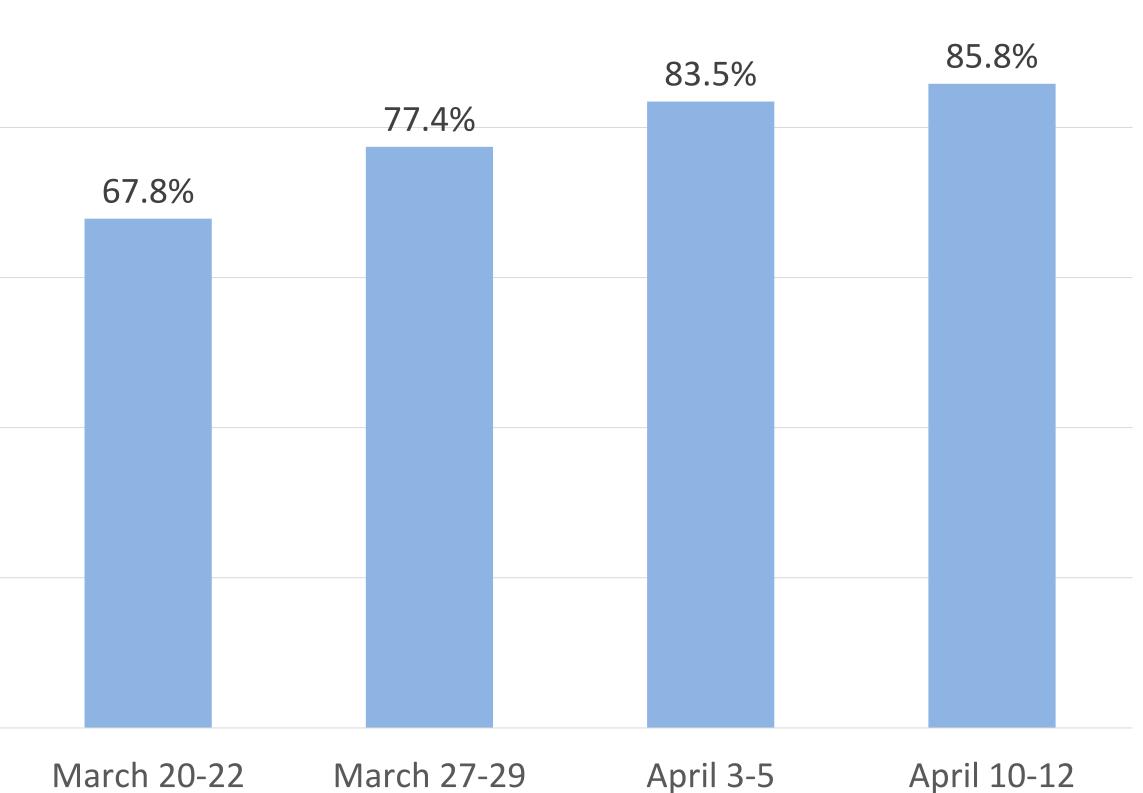


### Lives in a Place with Reported Cases of Coronavirus

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

100%			
80%			
60%		50.6%	
		50.070	
40%			
20%			
00/			
0%	M	arch 13-	15

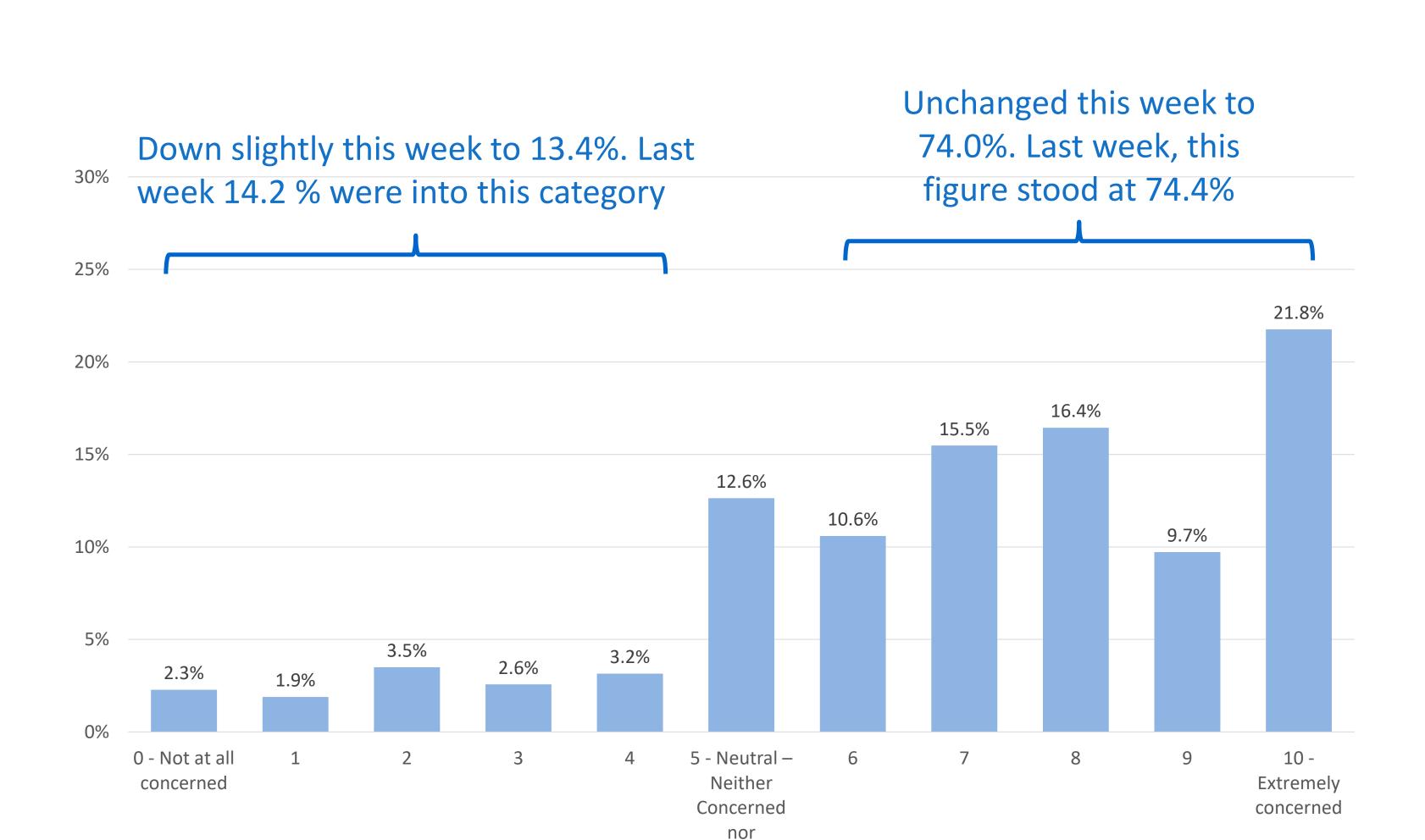




### Personal Health Concerns

**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 5 data. All respondents, 1,263 completed surveys. Data *collected April 10-12, 2020*)



unconcerned

Wave 5 (April 10-12)

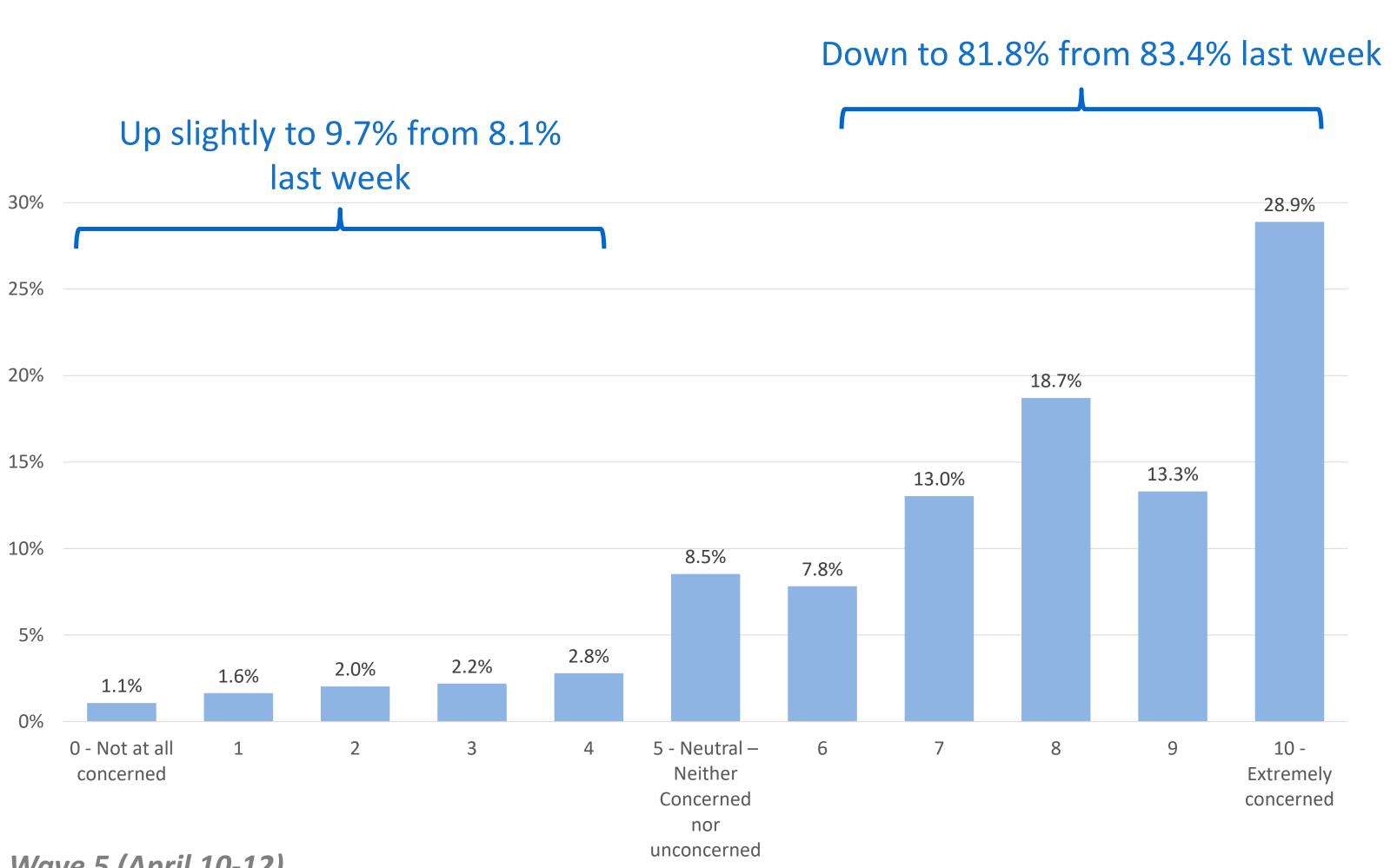




### Health Concerns (Family & Friends)

**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 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

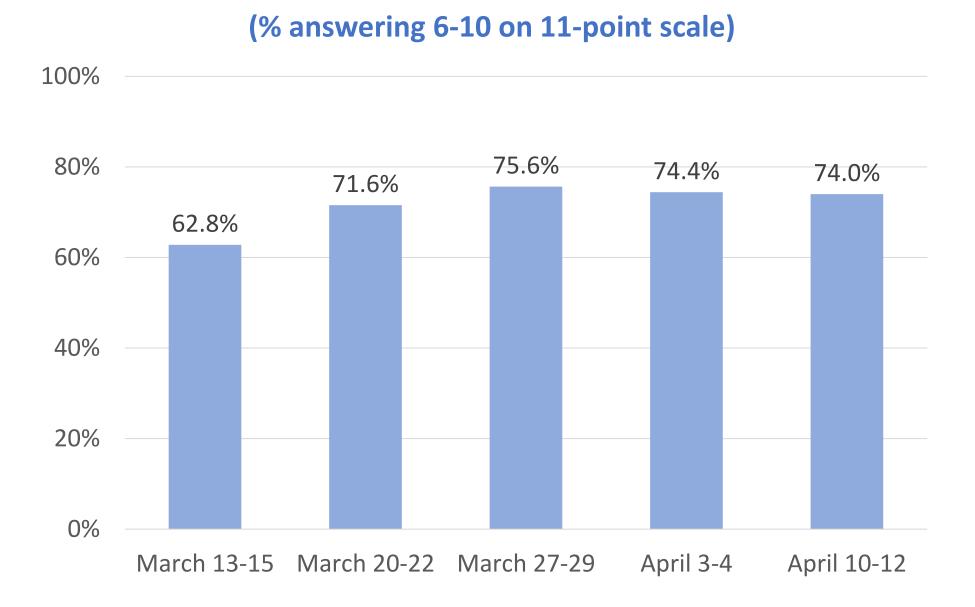


Wave 5 (April 10-12)



#### Summary: Safety Concern Metrics

#### **Concern About Contracting Virus (Personally)**

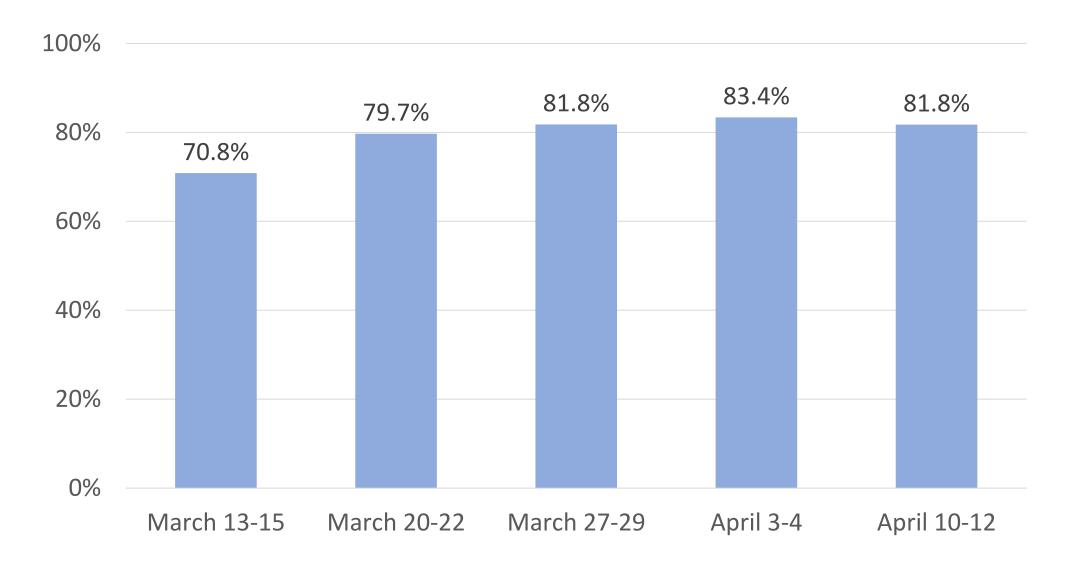


**Question:** Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

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



#### **Concern About Loved Ones Contracting Virus**



(% answering 6-10 on 11-point scale)

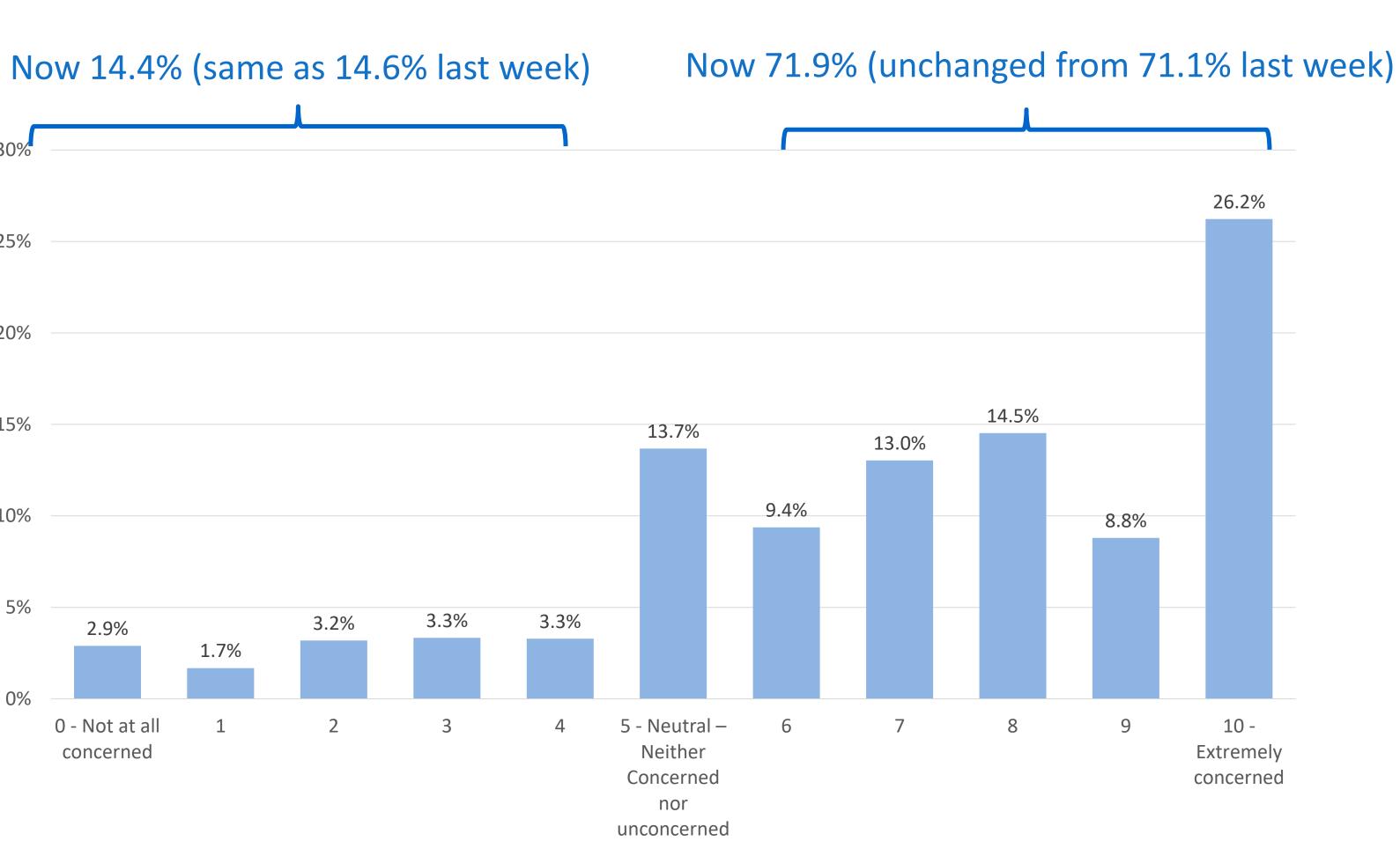
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

#### **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 5 data. All respondents, 1,263 completed surveys. Data *collected April 10-12, 2020*)

Now	14.4%	6 (same	as	14
30%				
25%				
20%				
15%				
10%				
5%	2.9%		3.	2%
		1 70/		



Wave 5 (April 10-12)



### **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?** 

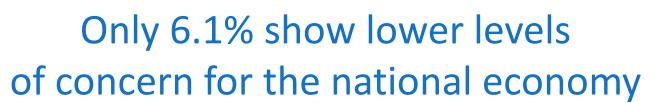
(Base: Wave 5 data. All respondents, 1,263 completed surveys. Data *collected April 10-12, 2020*)

### Only 6.1% show lower levels

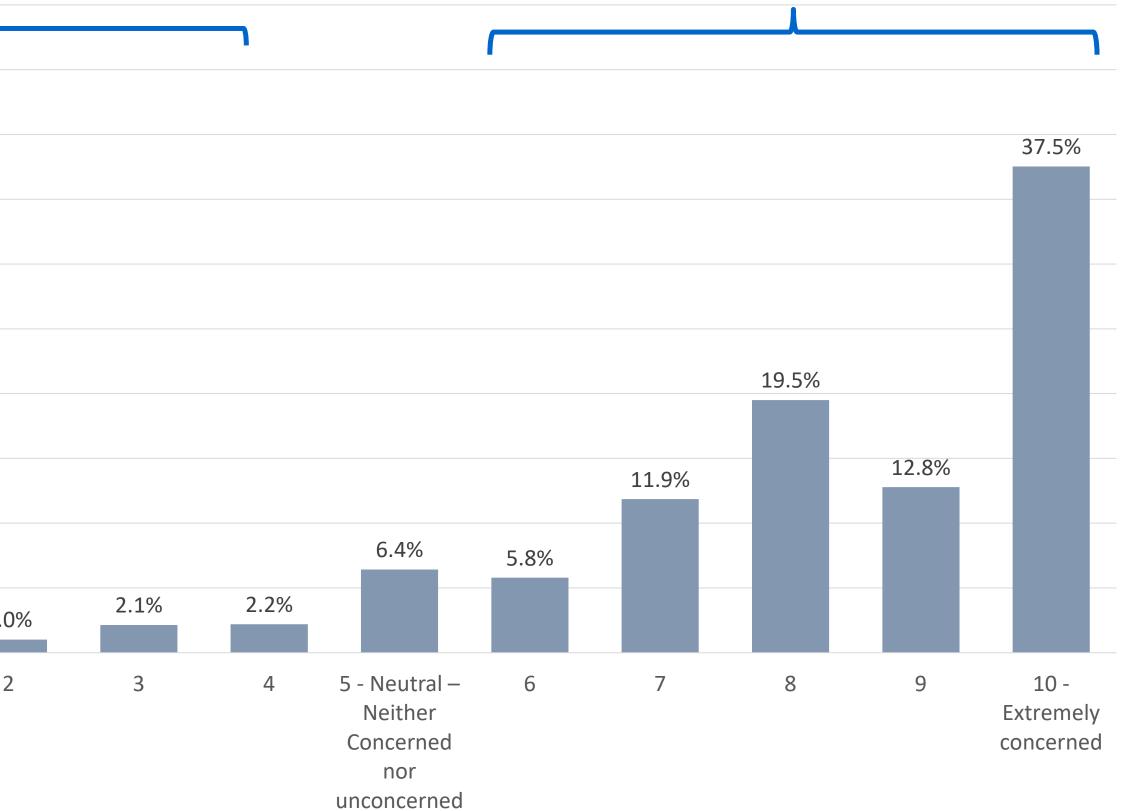
50%			
45%			
40%			
35%			
30%			
25%			
20%			
15%			
10%			
5%			
0%	0.6%	0.1%	1.0
	0 - Not at all concerned	1	:

Wave 5 (April 10-12)



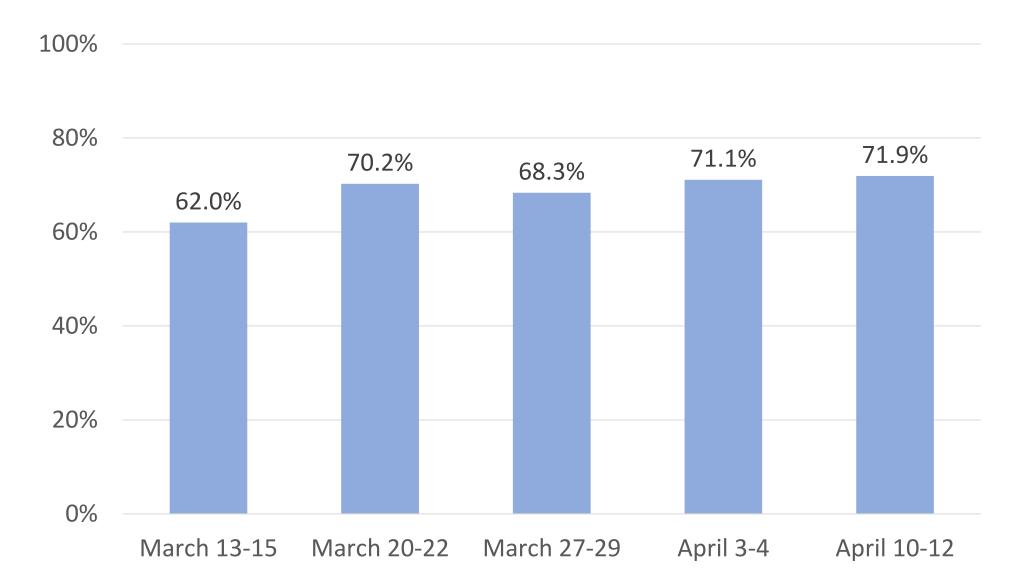


#### The vast majority (87.5%) are concerned about the impact on the economy. Down slightly from 88.4% last week



### Summary: Economic Concern Metrics

#### **Personal Finances**



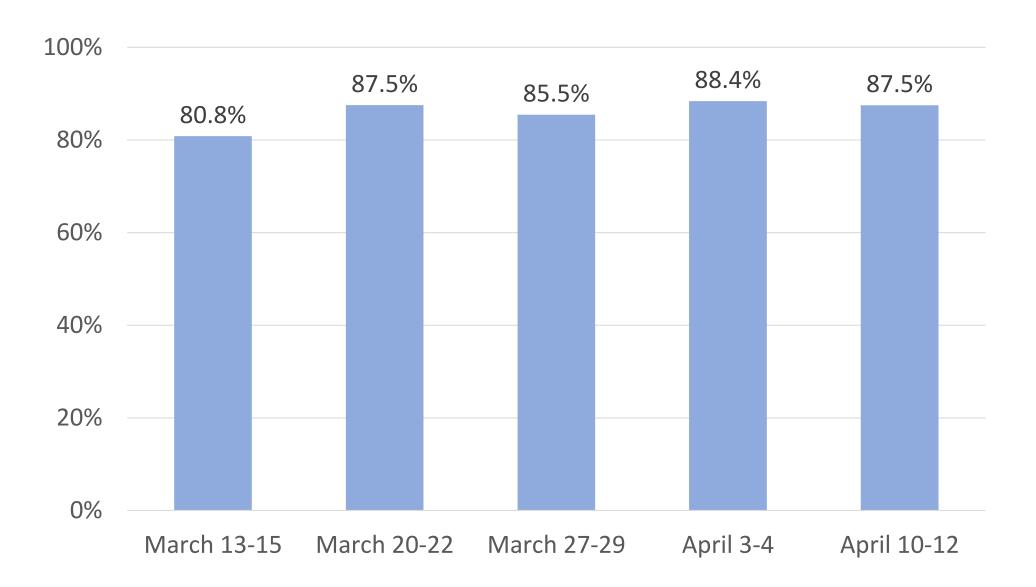
#### (% answering 10-6 on 11-point scale)

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 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29d April 10-12)



#### **National Economy**



#### (% answering 10-6 on 11-point scale)

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

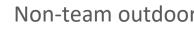
### Perceived Safety of Travel Activities (Wave 5)

Traveling on a cruise line Sporting events - Large venue (e.g., professionalsports, minor league or college sports) Traveling outside the United States Attending a performance (music show, theater, movie, etc.) Attending a conference or convention Sporting events - Small venue (School sports, youth sport leagues, tournaments and league play) Traveling on a commercial airline Visiting a museum, aquarium, landmarks or other indoor attraction Visiting an amusement park, zoo, gardens, parks or other outdoor attractions

moment, how safe would you feel doing each type of travel activity?

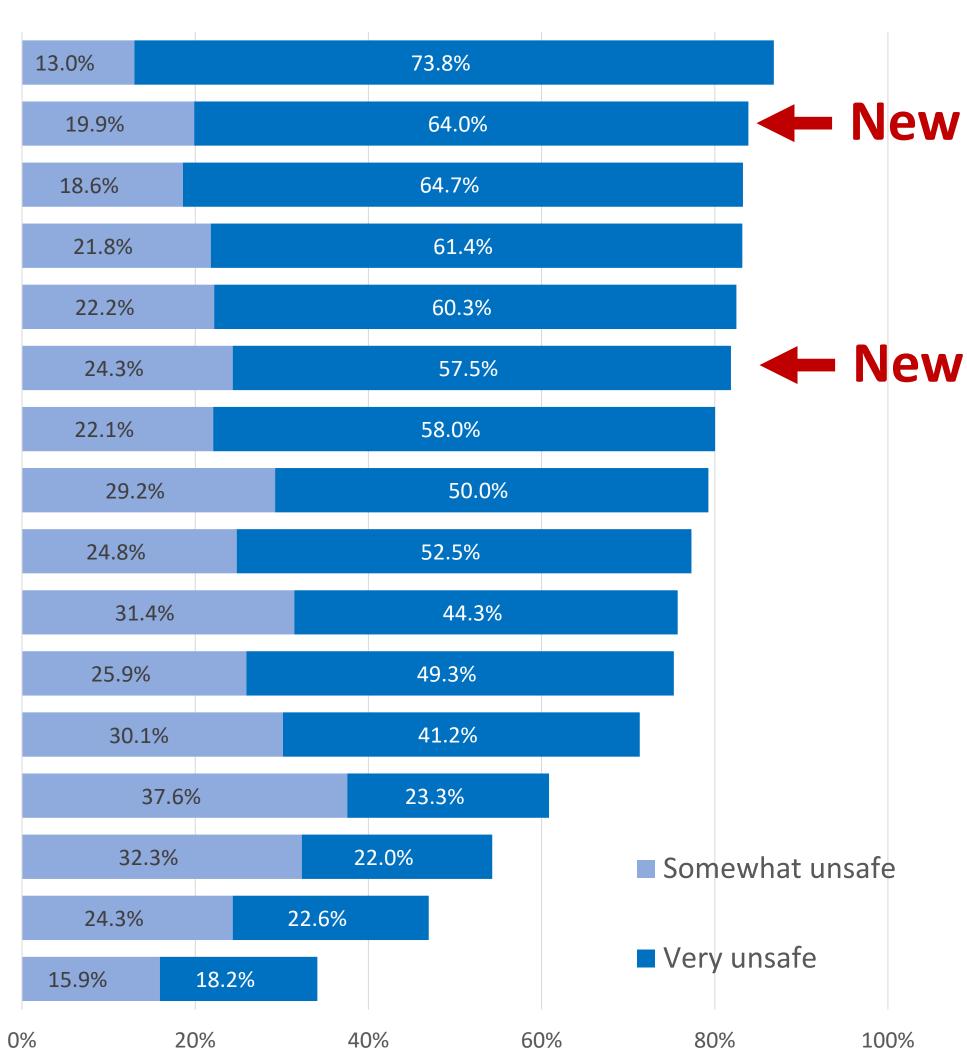
**Question:** At this

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

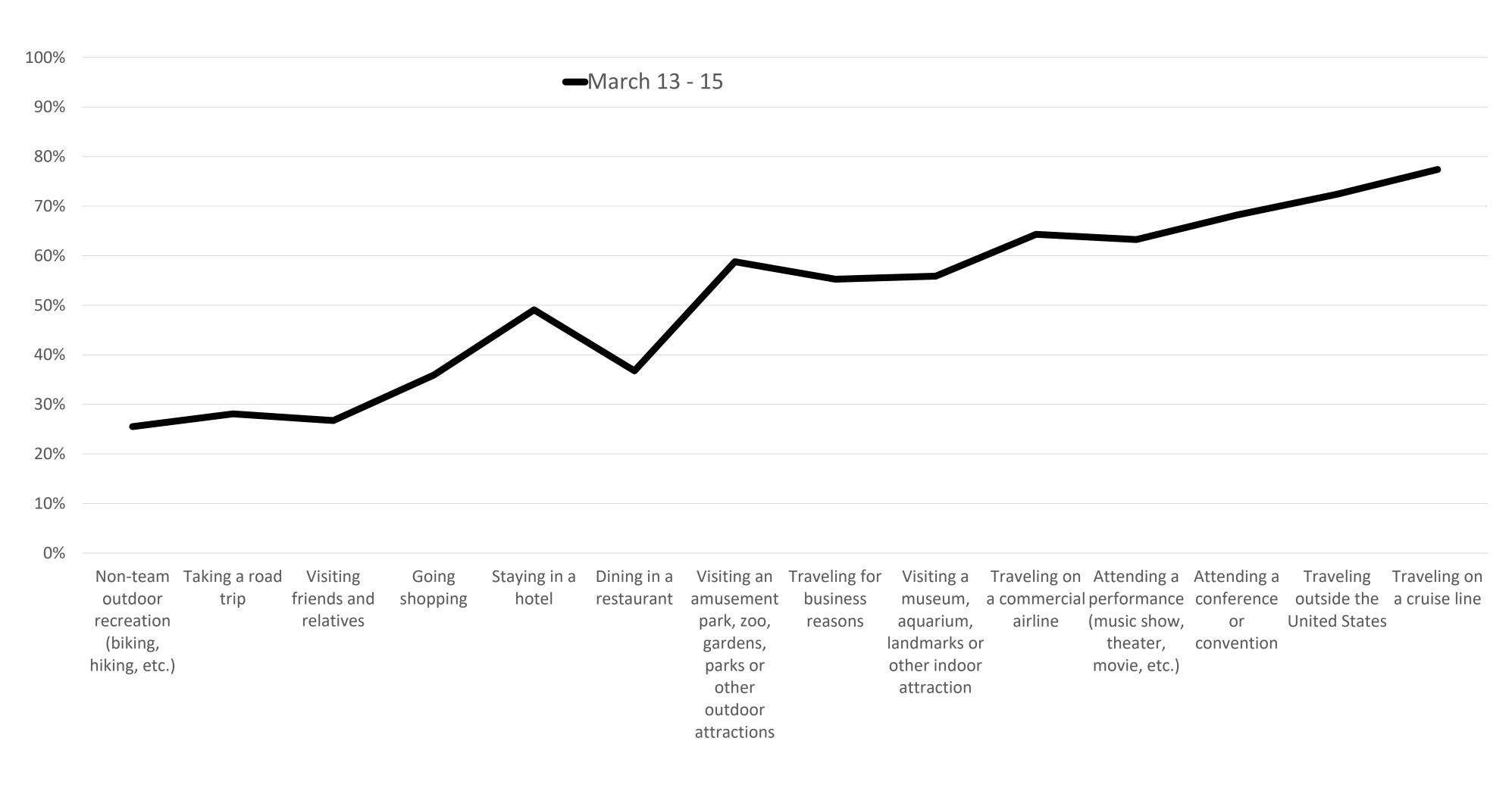




Dining in a restaurant Traveling for business reasons Staying in a hotel Going shopping Visiting friends and relatives Taking a road trip Non-team outdoor recreation (biking, hiking, etc.)

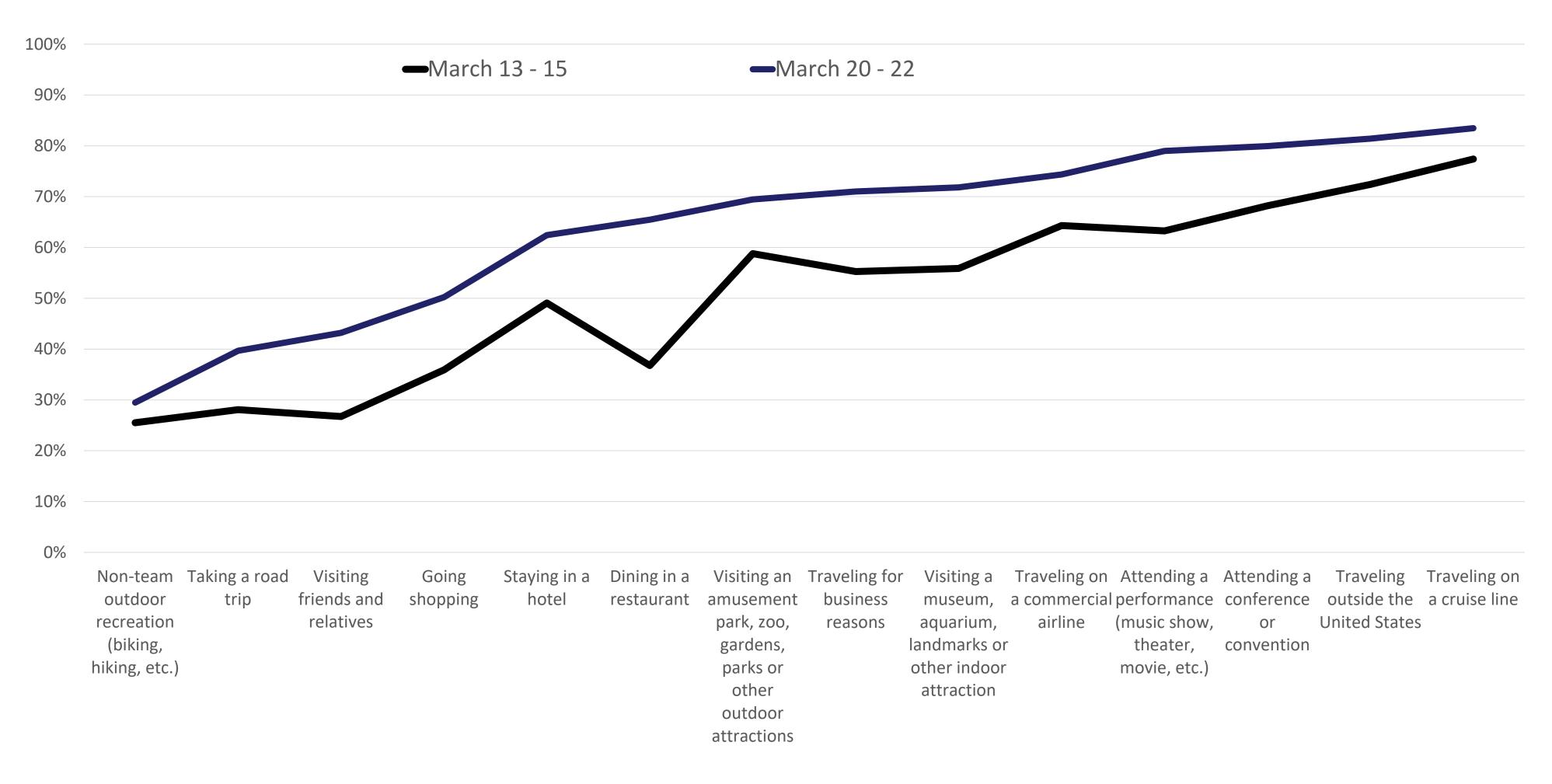


#### Question: At this moment, how safe would you feel doing each type of travel activity?



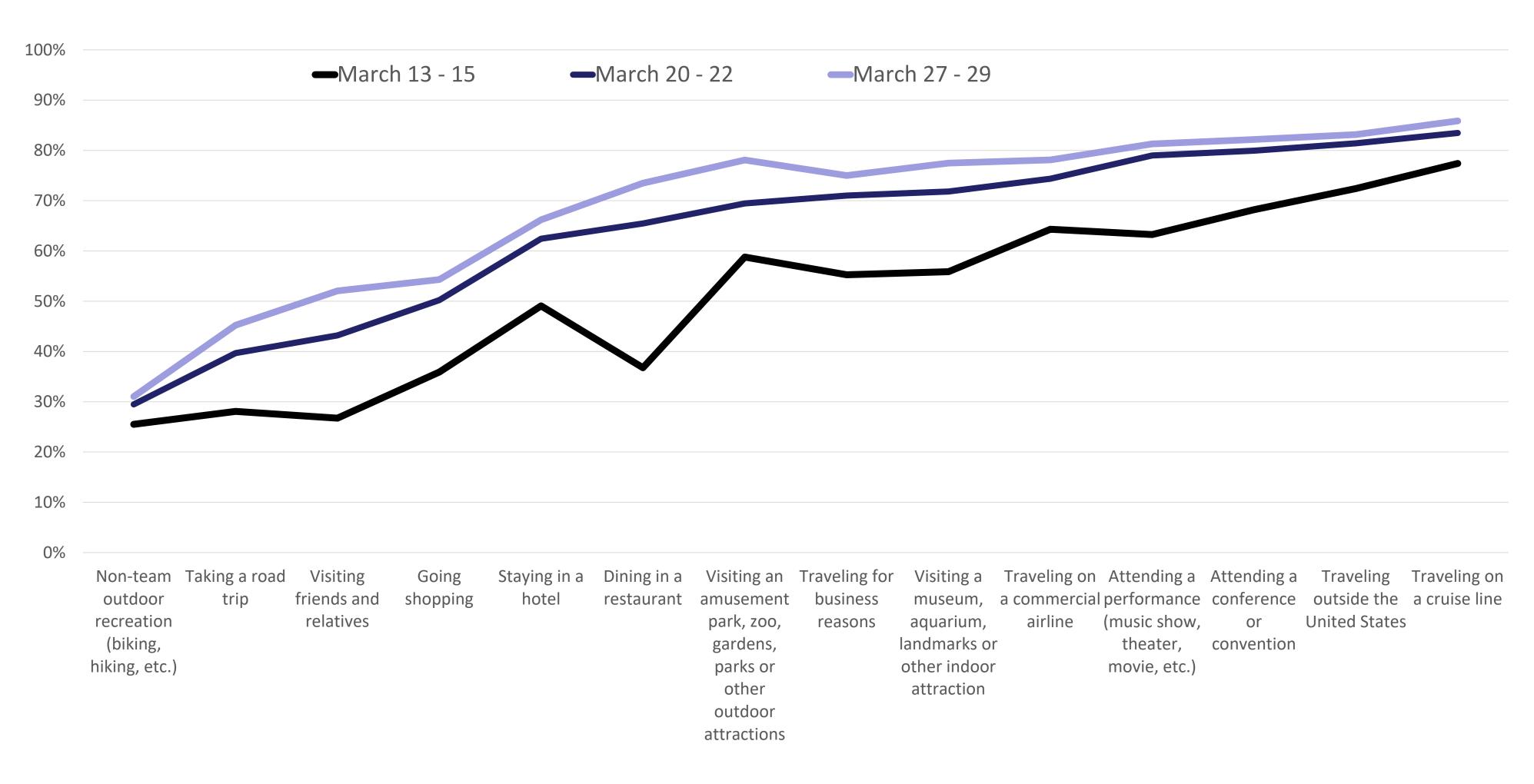


#### Question: At this moment, how safe would you feel doing each type of travel activity?



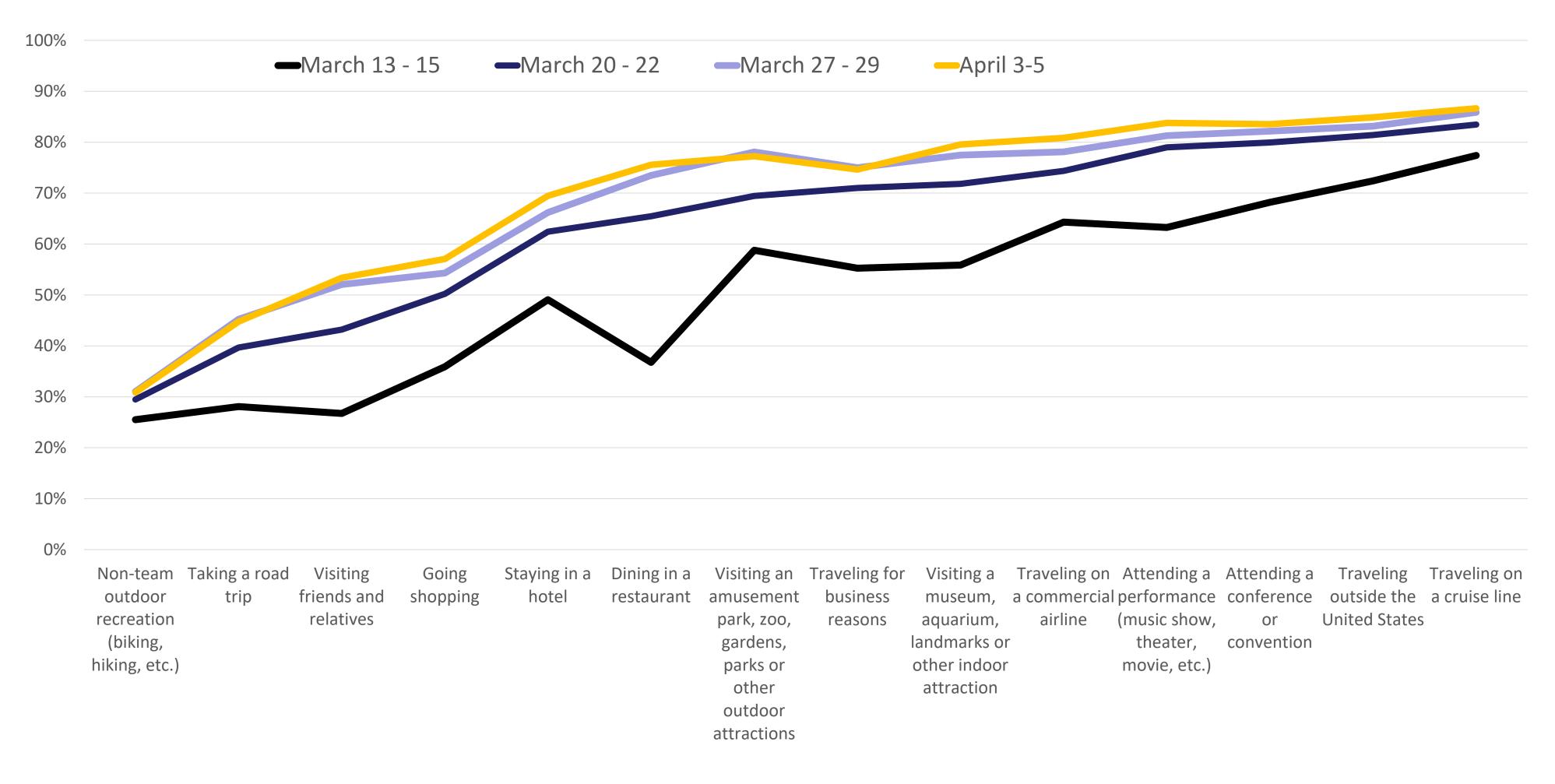


#### Question: At this moment, how safe would you feel doing each type of travel activity?



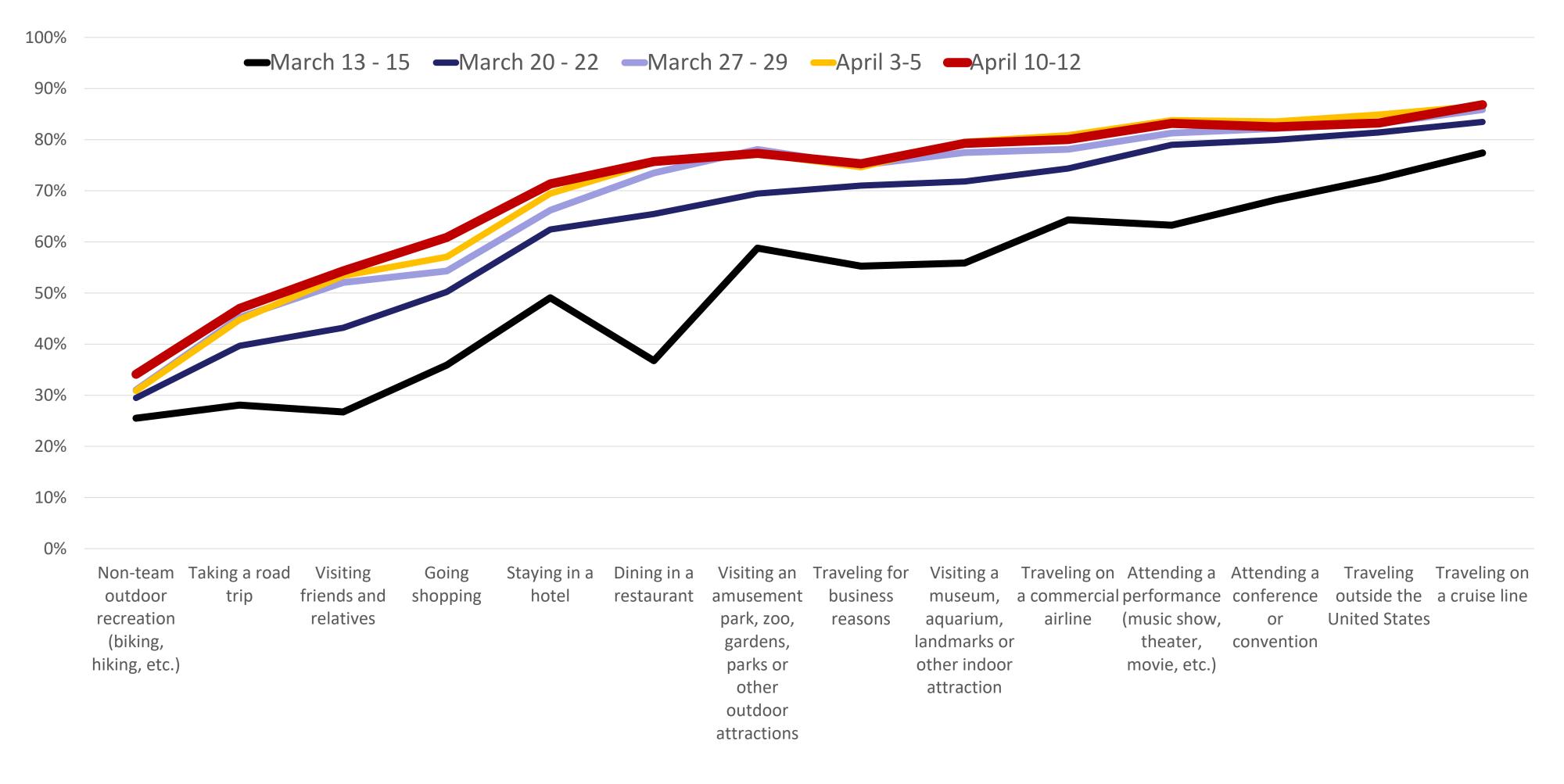


#### Question: At this moment, how safe would you feel doing each type of travel activity?

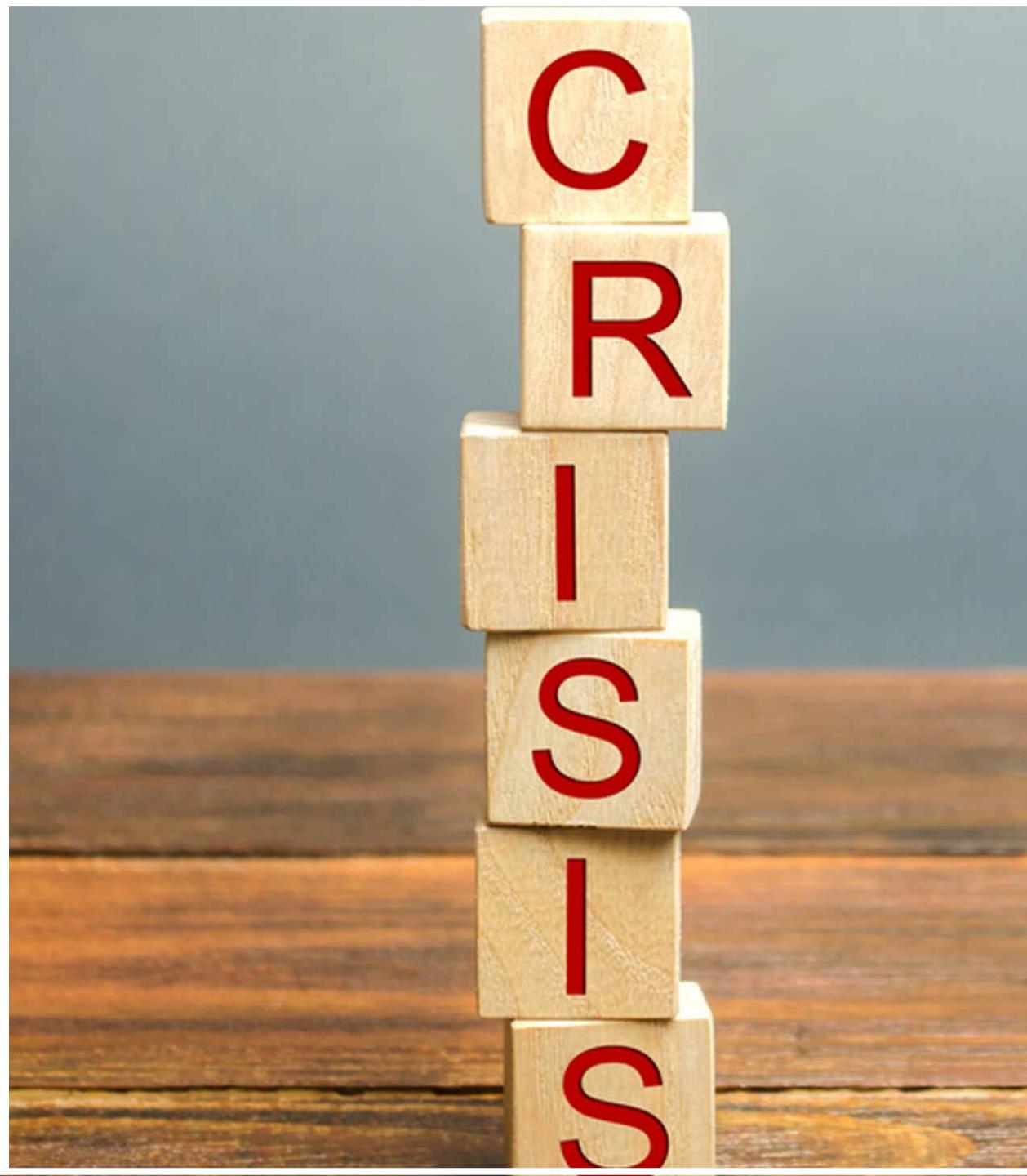




#### Question: At this moment, how safe would you feel doing each type of travel activity?







### **Concerns for:**

- Safety (Personal/friends/family)
- Economics
- Travel activity safety

Highly elevated, yet seem to have slowed or even topped-out

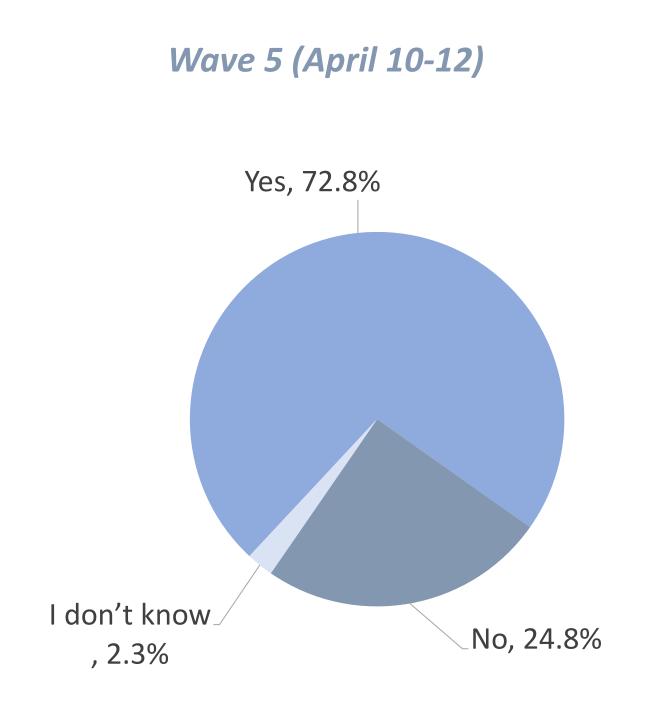


## Impact on Travel Behaviors

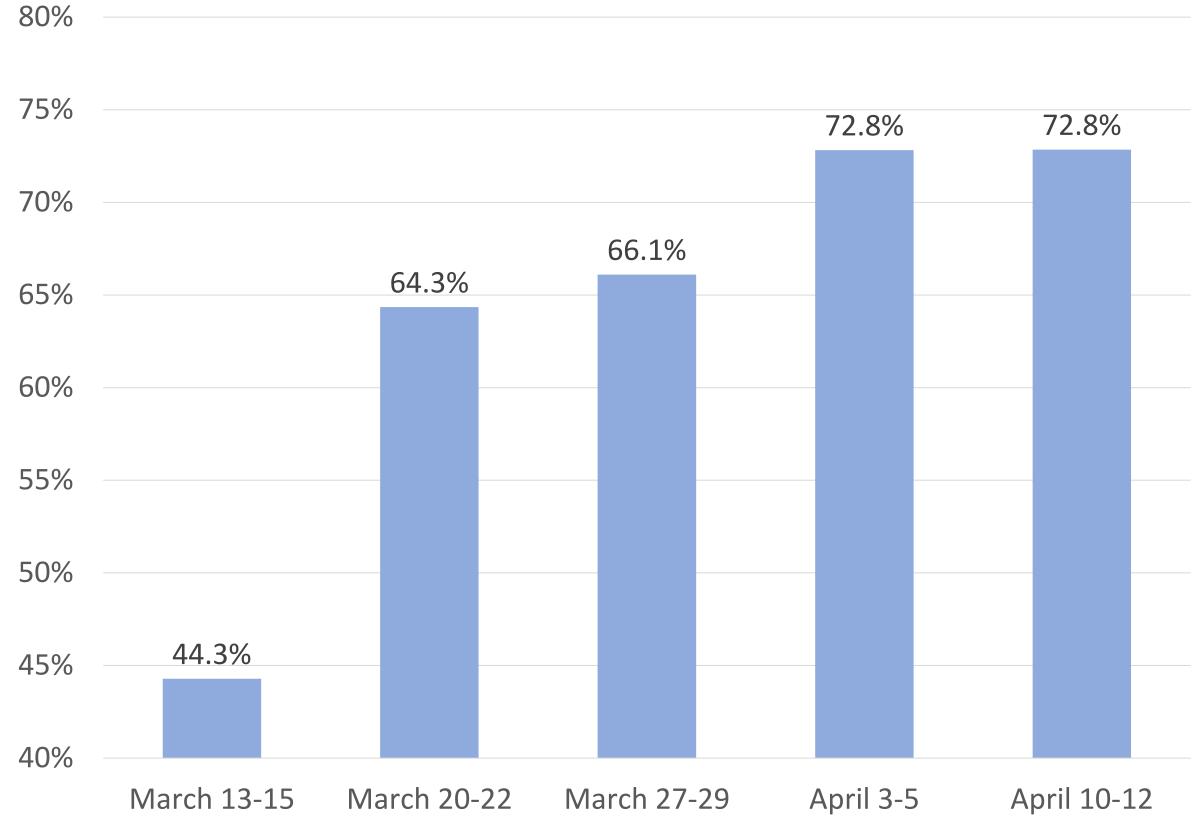


### Impact of the Coronavirus on Travel

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



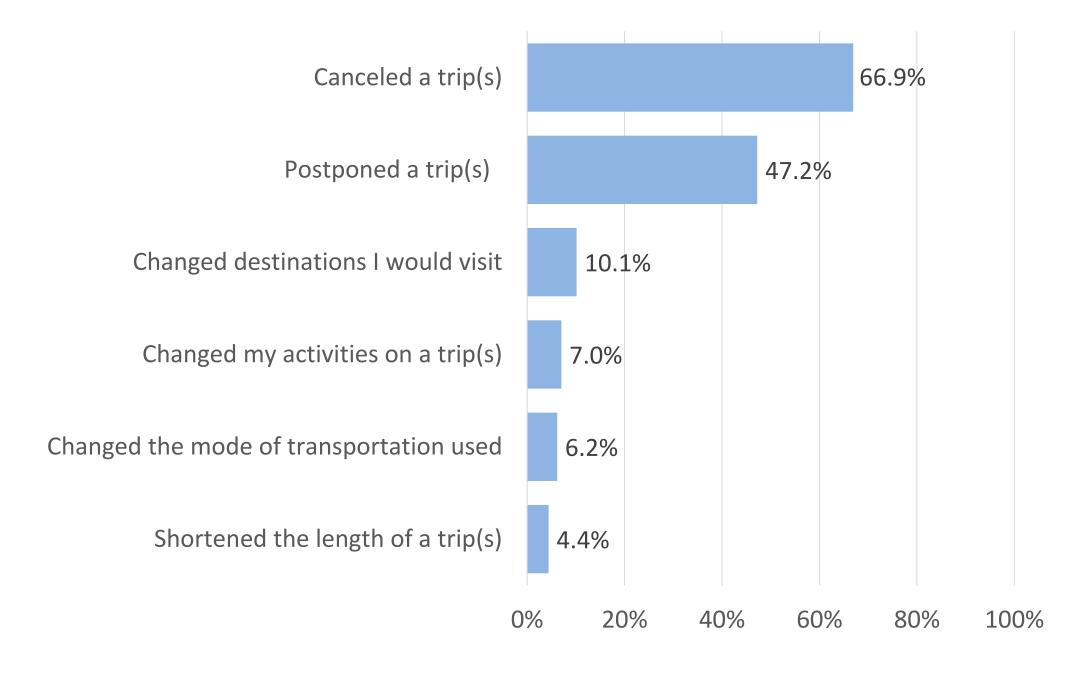




### How the Coronavirus has Impacted Travel

#### **Question:** How has coronavirus situation affected your travel? (Select all that apply)

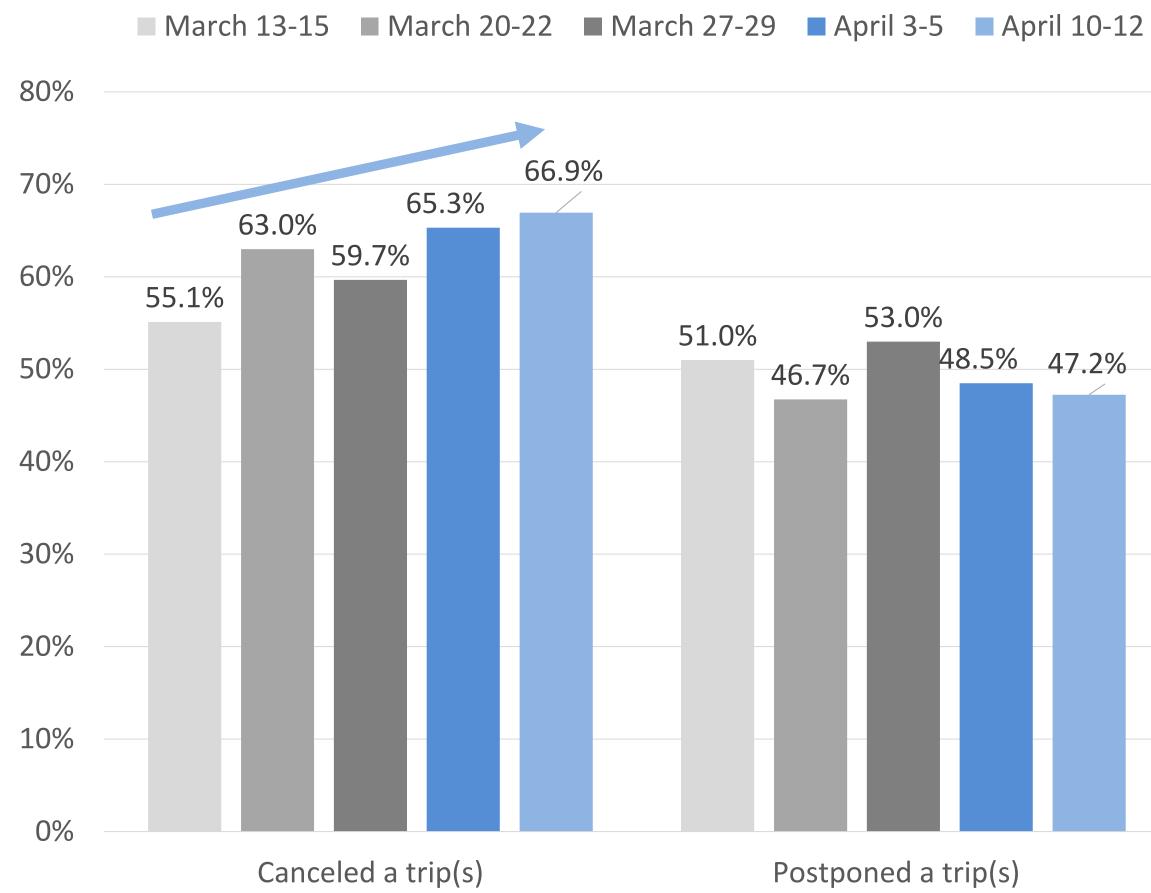




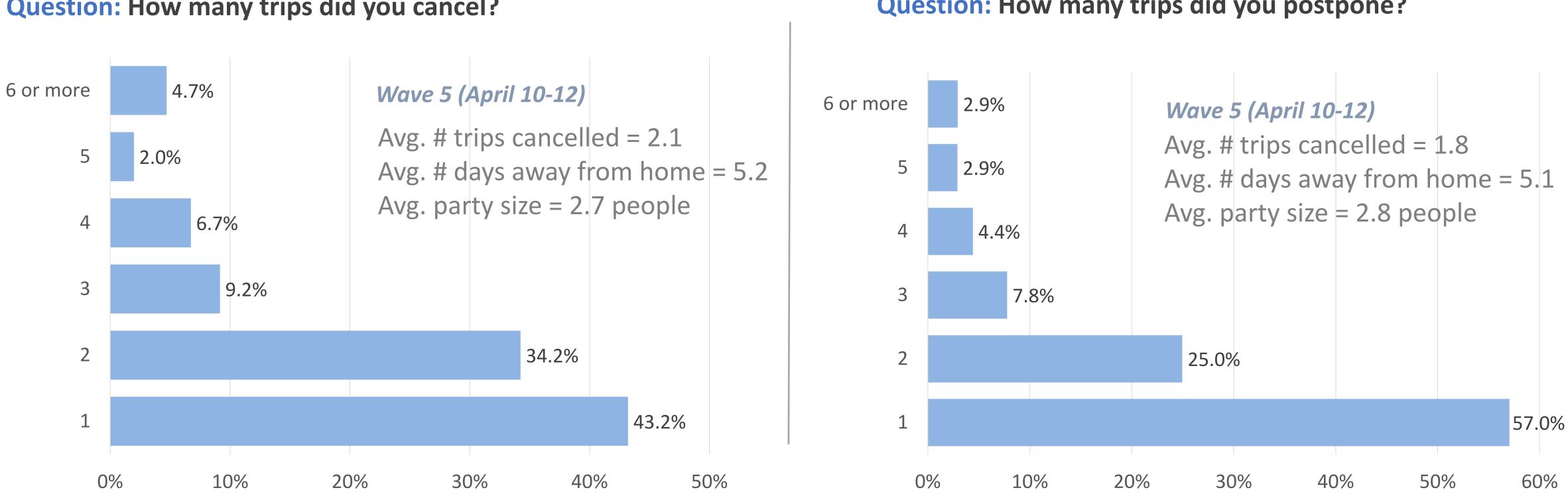
Wave 5 (April 10-12)



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



### **Trips Cancelled/Postponed**



#### **Question:** How many trips did you cancel?



#### **Question:** How many trips did you postpone?

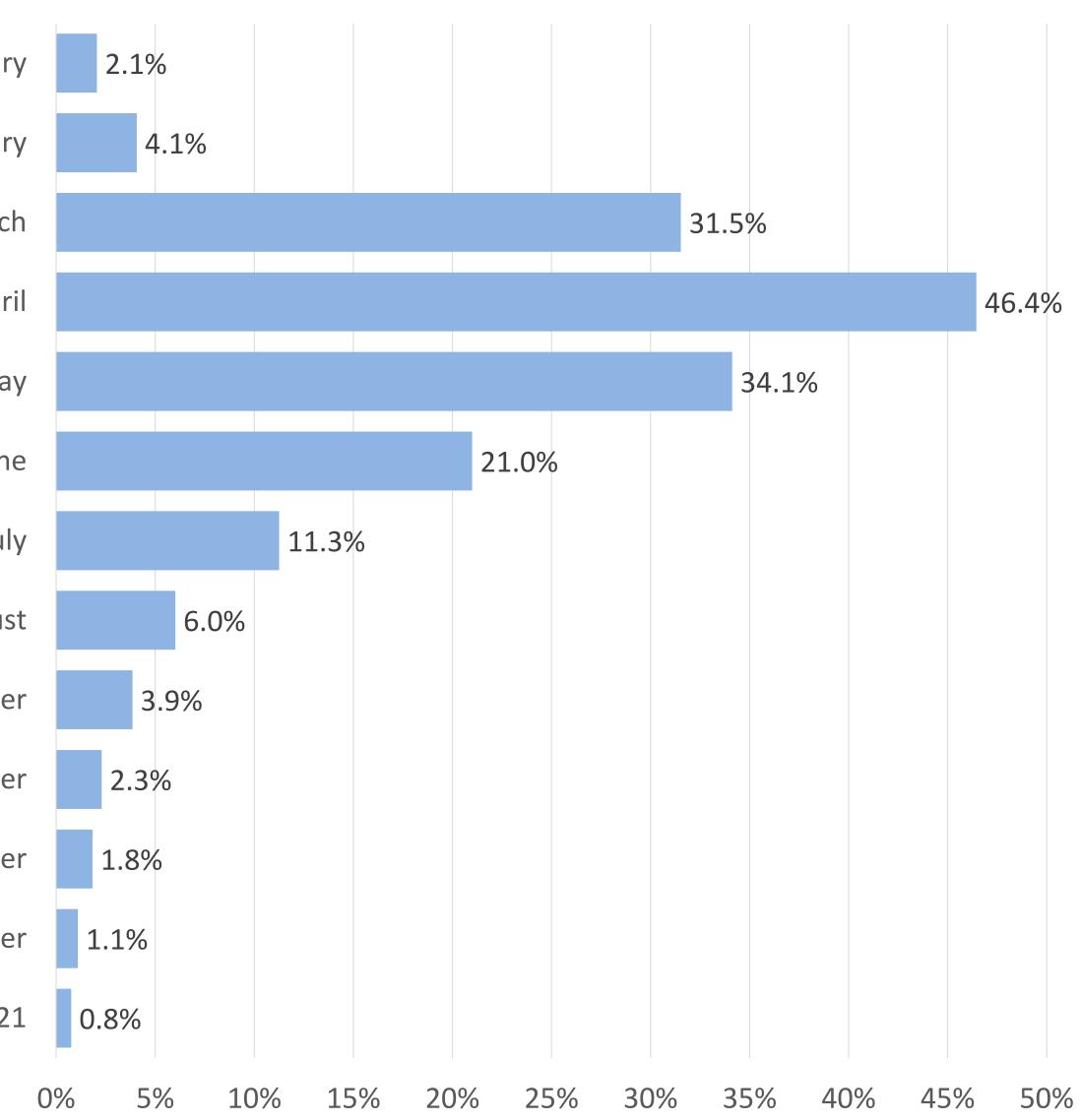
(Base: Respondents cancelling/postponing a trip, 624/440 completed surveys. Data collected April 10-12, 2020)



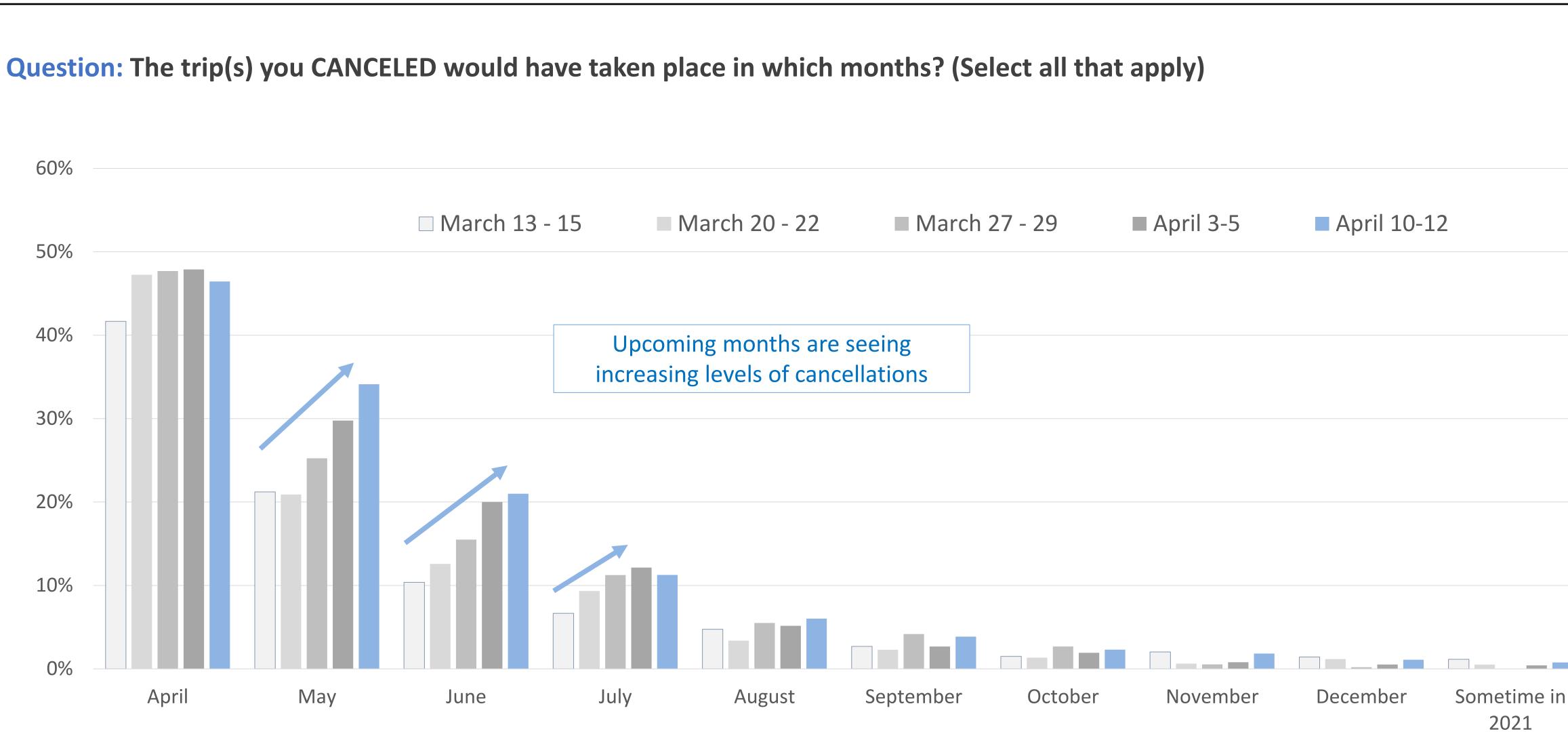
### Month of Trip Cancellation

Question: The trip(s) you CANCELED	January
would have taken place in which months? (Select all that apply)	February
	March
(Base: Cancelling trips, 624 completed surveys.	Apri
Data collected April 10-12, 2020)	May
	June
	July
	Augus
	September
	October
	November
	December
	Sometime in 2021





### Month of Trip Cancellation

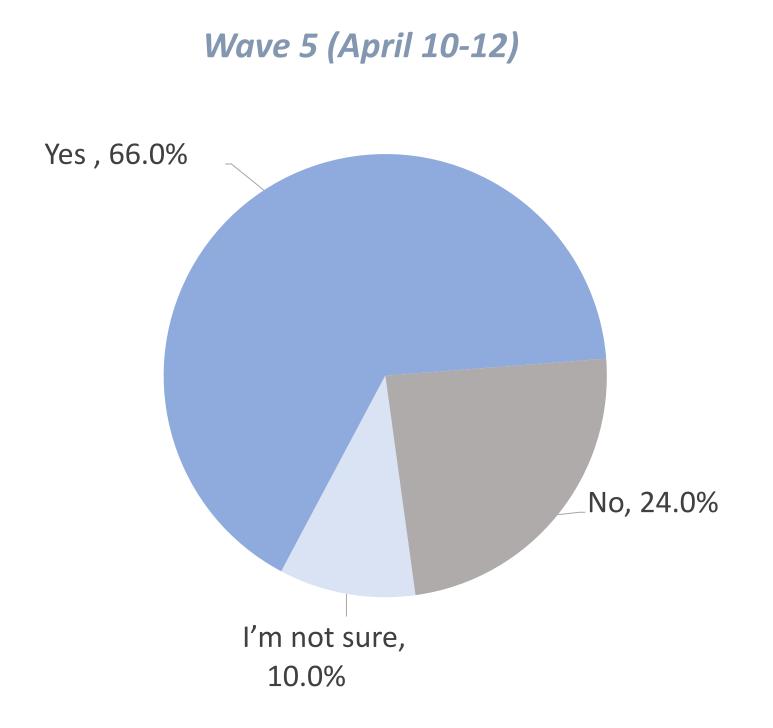


(Base: Cancelling trips, 292, 477, 506, 580 and 623 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 2020. Note: Data purposefully excluded from this chart for readability.)



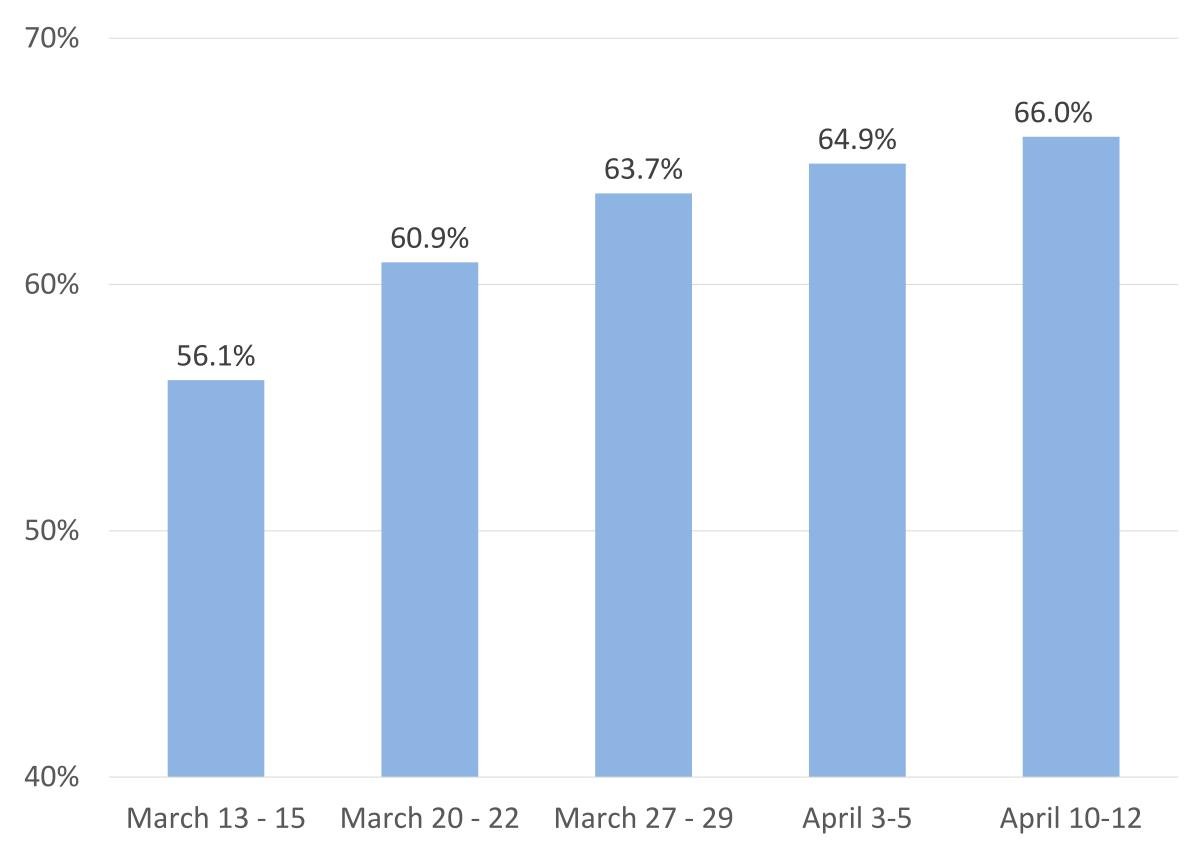
### Did Traveler Get Full Refunds?

### **Question:** Did you get full refunds for any reservations you canceled? (Select one)



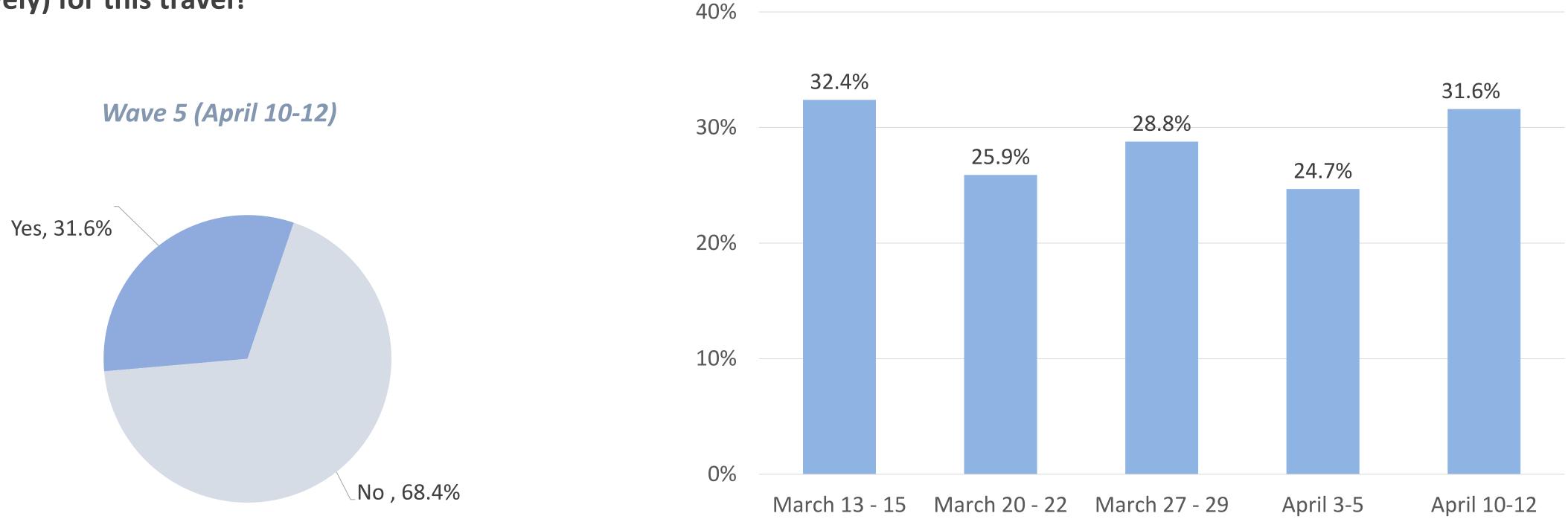
(Base: Respondents cancelling a trip, 623 completed surveys. Data collected April 10-12, 2020)





### 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?

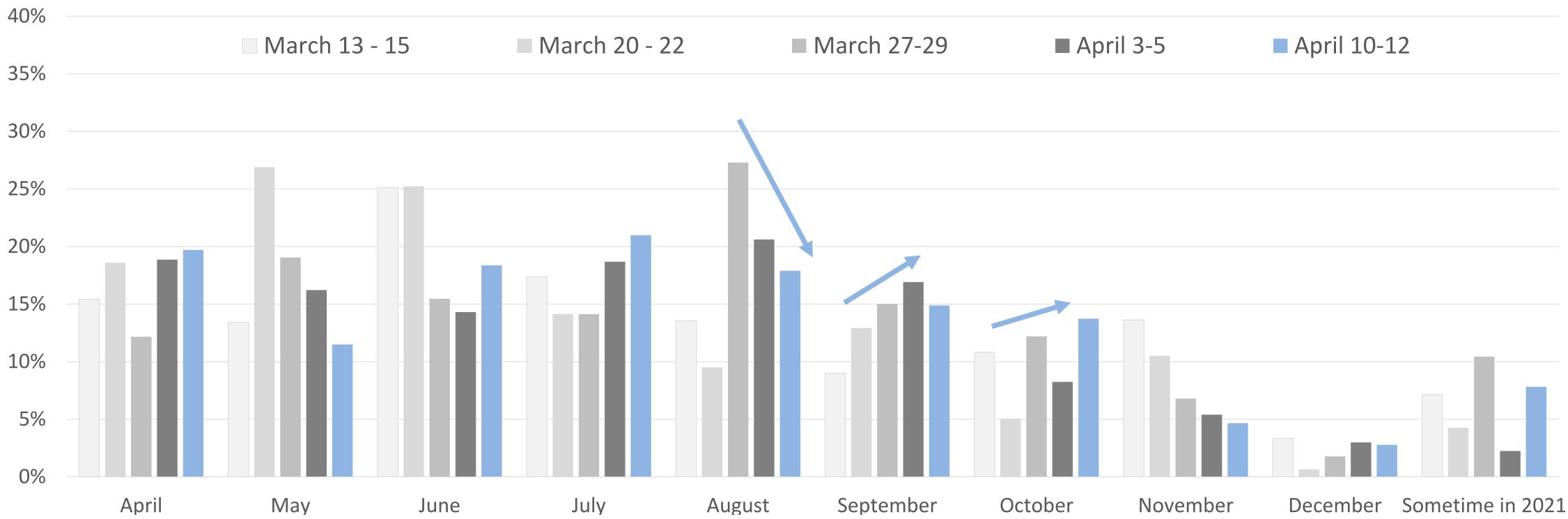




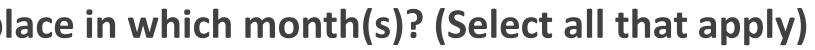
(Base: Postponing trips, 277, 354, 404, 433, 435 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

### Month Postponed Trips Rescheduled

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

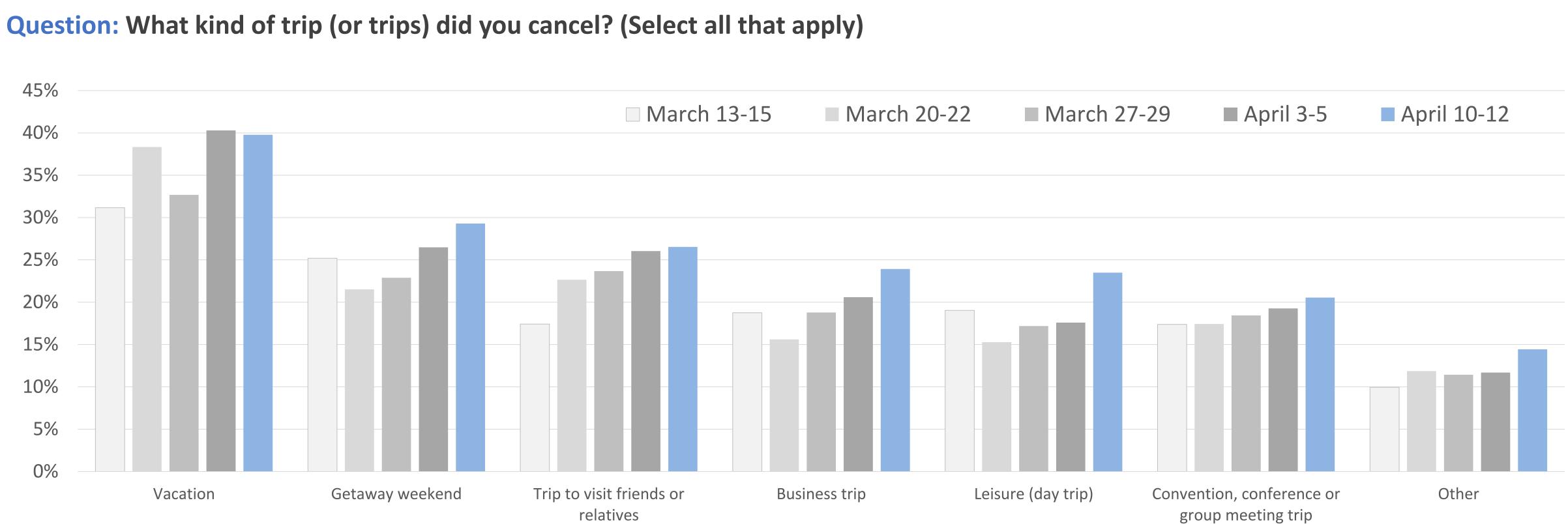






(Base: Postponing trips rescheduled, 99,86, 120, 107 and 132 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12 2020)

### **Types of Trips Cancelled**

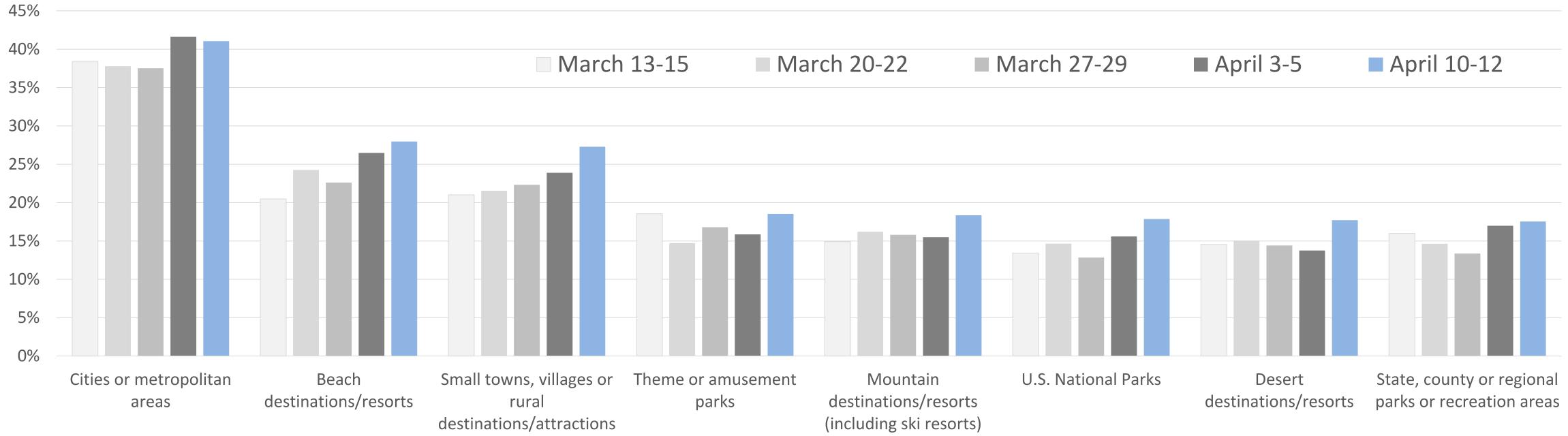


(Base: Cancelling trips, 292, 477, 506, 580, 624 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



### **Types of Destinations 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, 580, 624 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



### Types of Trips Postponed

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

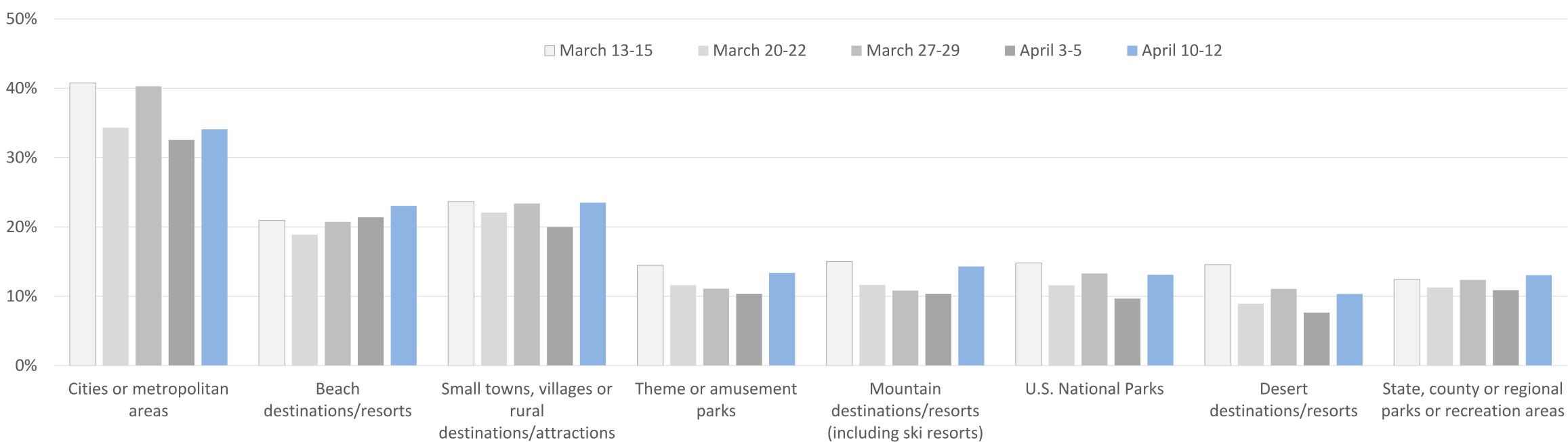


(Base: Postponing trips, 277, 354, 404, 435 and 440 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



### **Types of Destinations Postponed**

**Question:** Thinking about these postponed trips, which destin (Select all that apply)



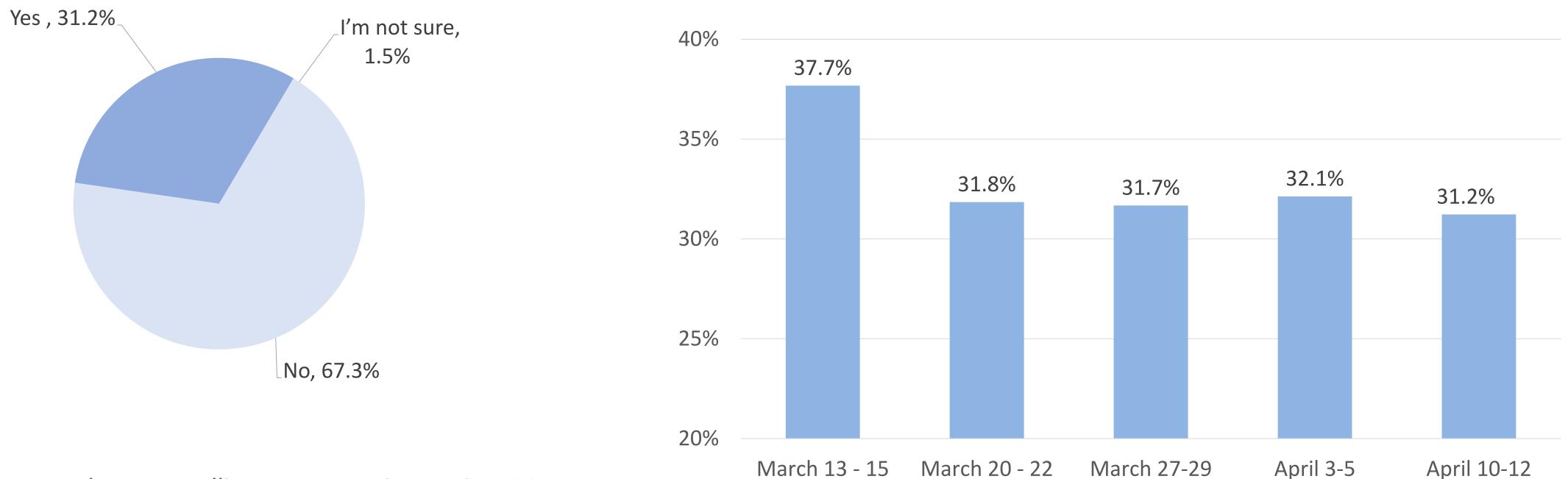
(Base: Postponing trips, 277, 354, 404, 435 and 440 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)





### International Trips Postponed or 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)

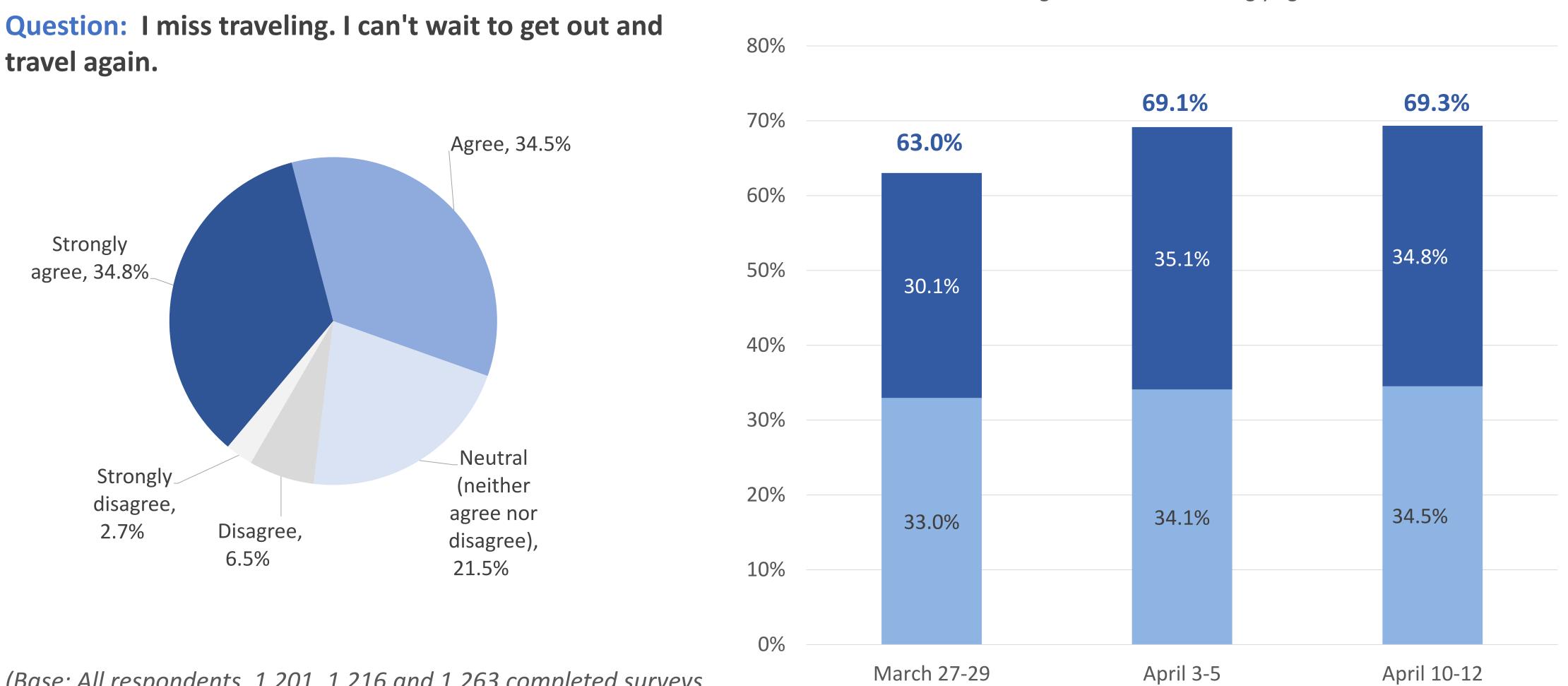


# **Impact on Sentiment & Perceptions**



# **Excitement to Get Back to Travel**

How much do you agree with the following statement?



(Base: All respondents, 1,201, 1,216 and 1,263 completed surveys. Data collected March 27-29 and April 3-5 and 10-12 2020)



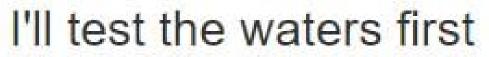
## ■ Strongly agree

Agree

# How Will They Get Back to Travel?

## In the period after coronavirus, how are you going to approach getting back into travel? (Pick the image that best describes you)







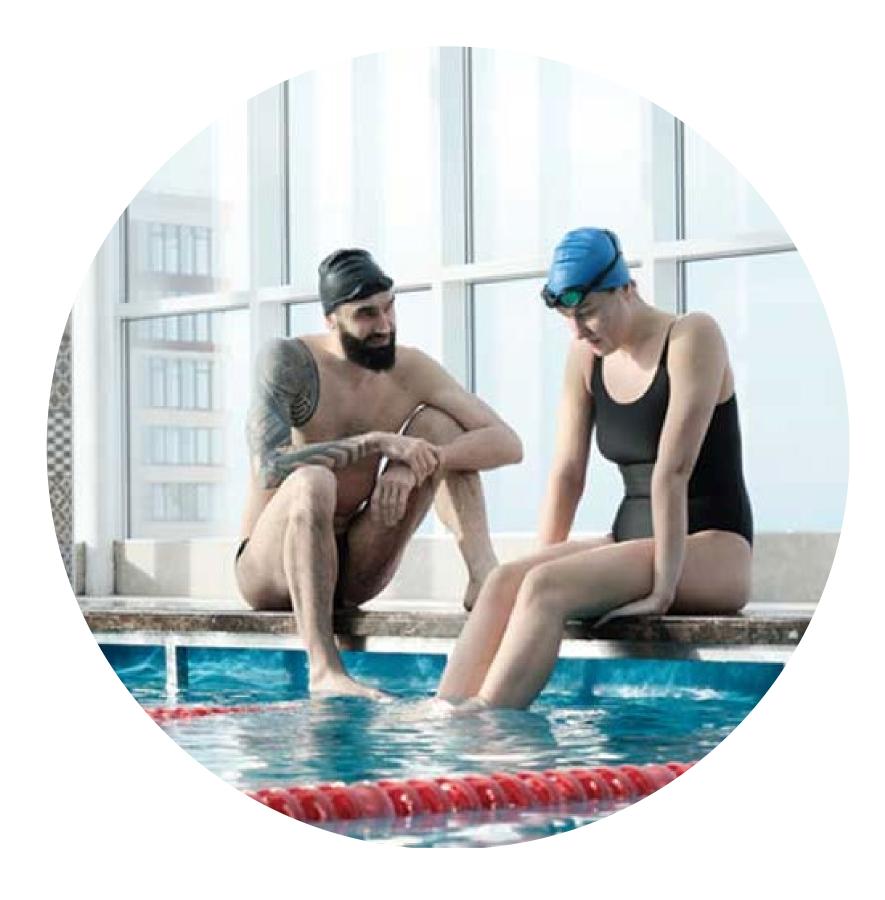
I'll get back in but carefully







I'll jump right back in



## 47.0%

I'll get back in but carefully



# In the period after coronavirus, how are you going to approach getting back into travel?





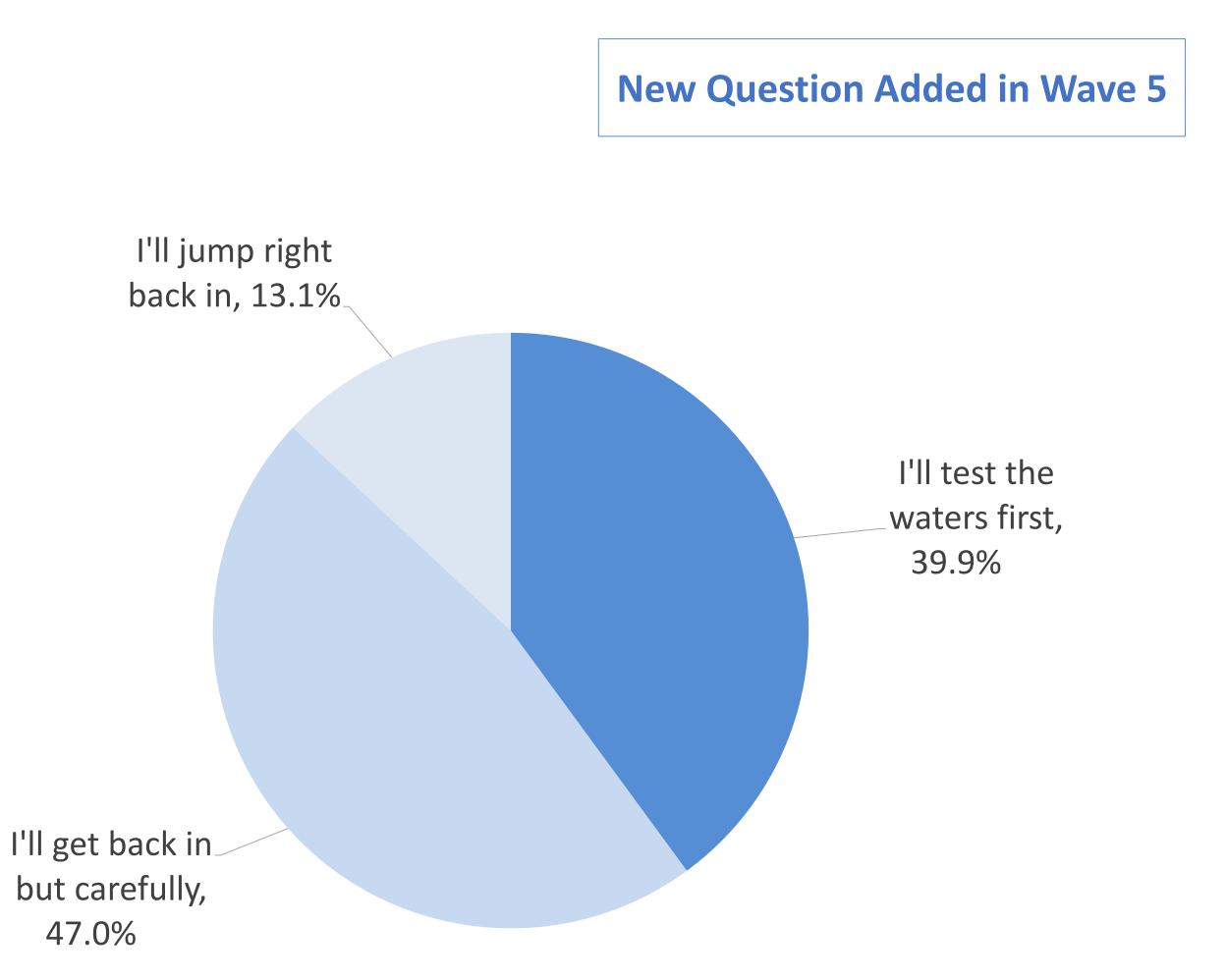
## 13.1% I'll jump right back in

## 39.9% I'll test the waters first

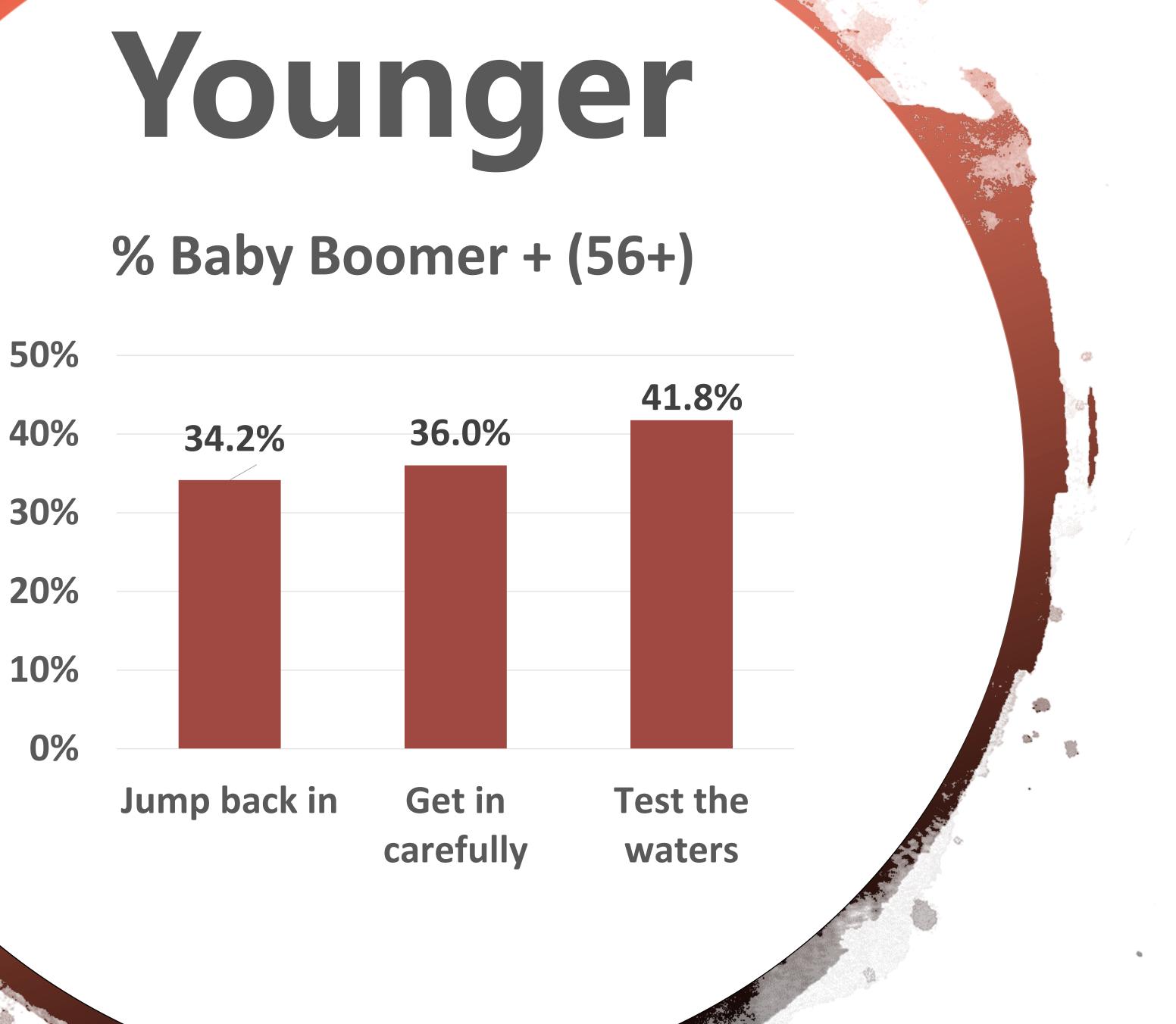
**Question:** In the period after coronavirus, how are you going to approach getting back into travel? (Pick the image that best describes you)

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



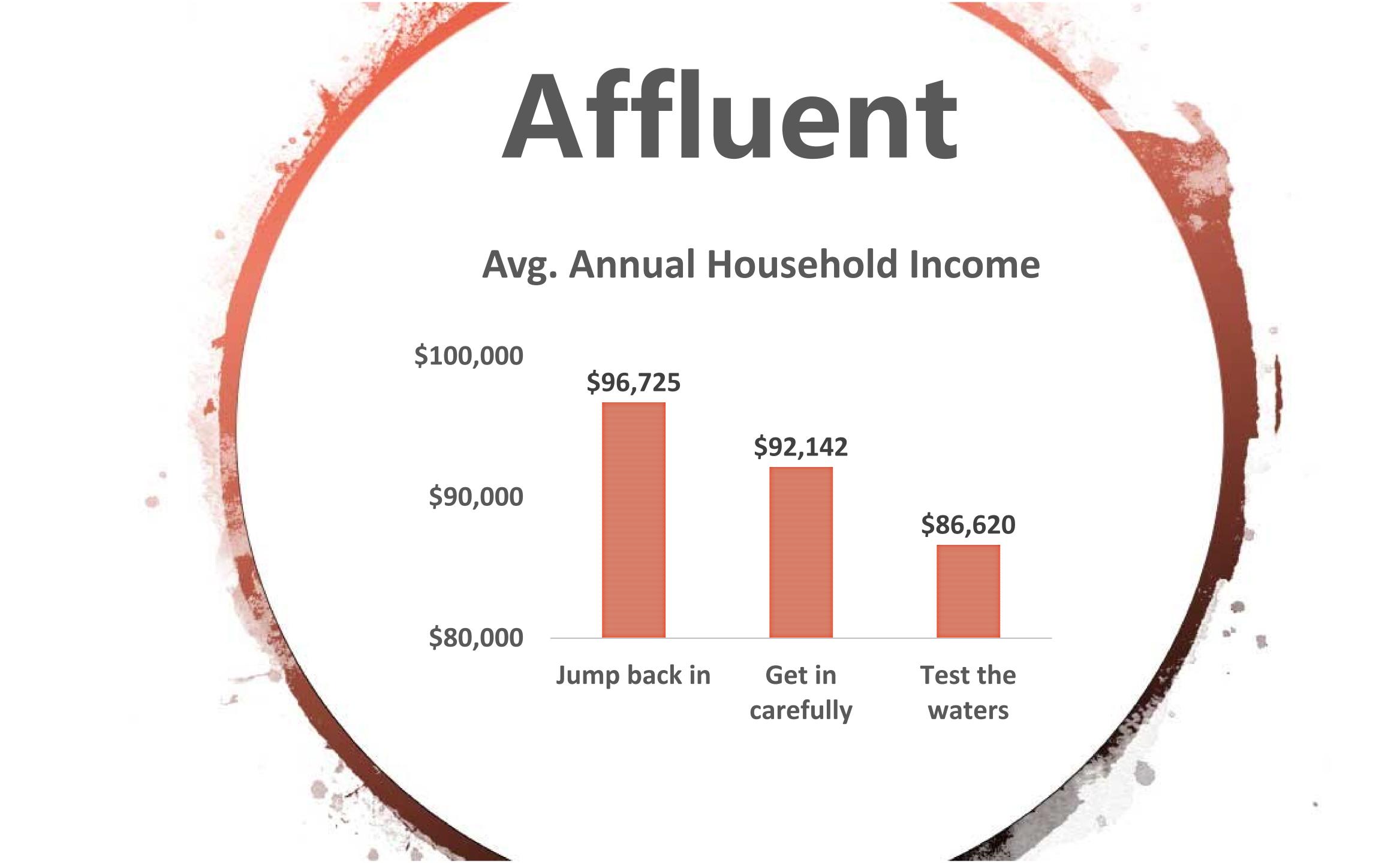


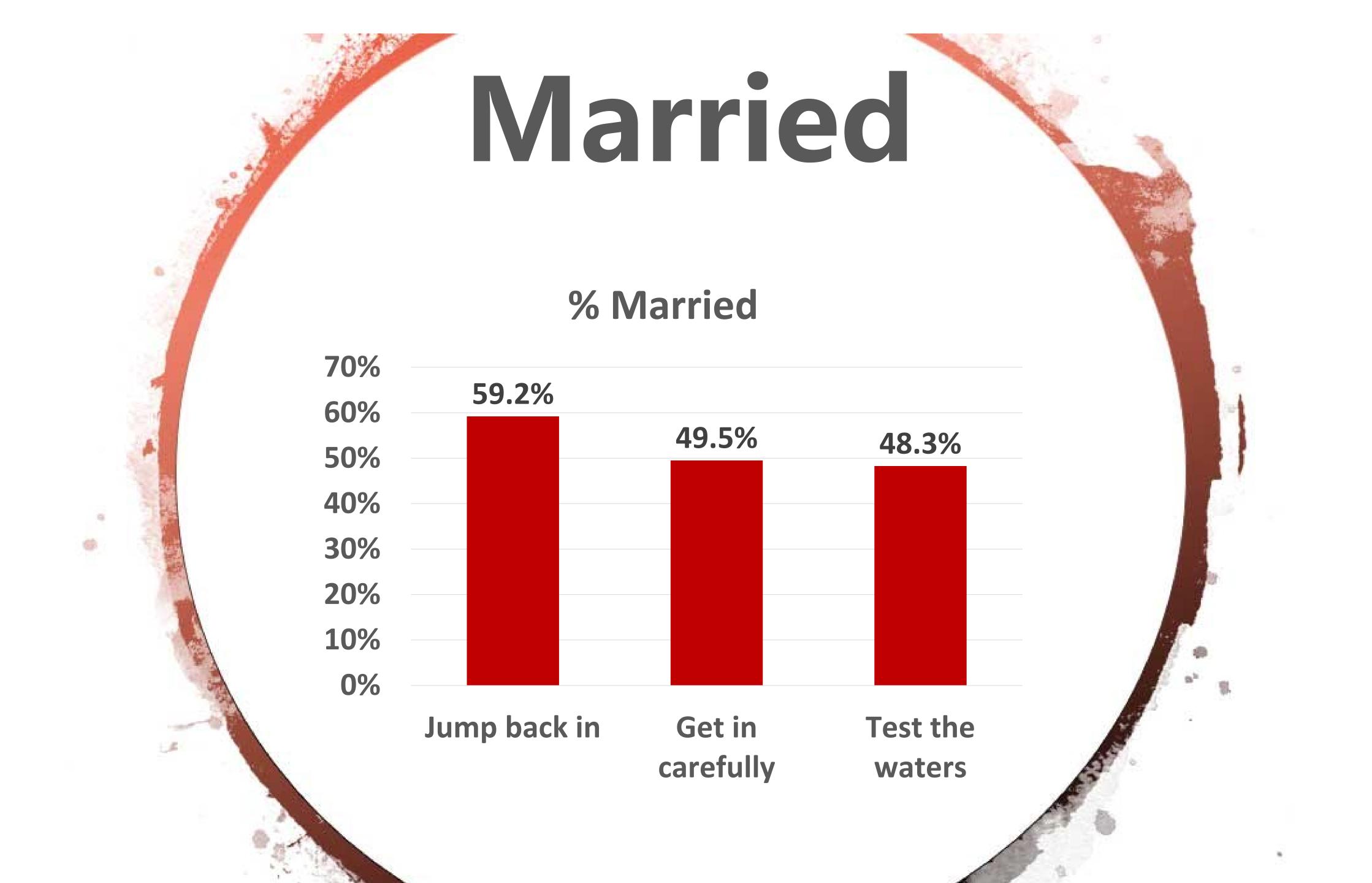
# WHO Plans To Jump Right In?

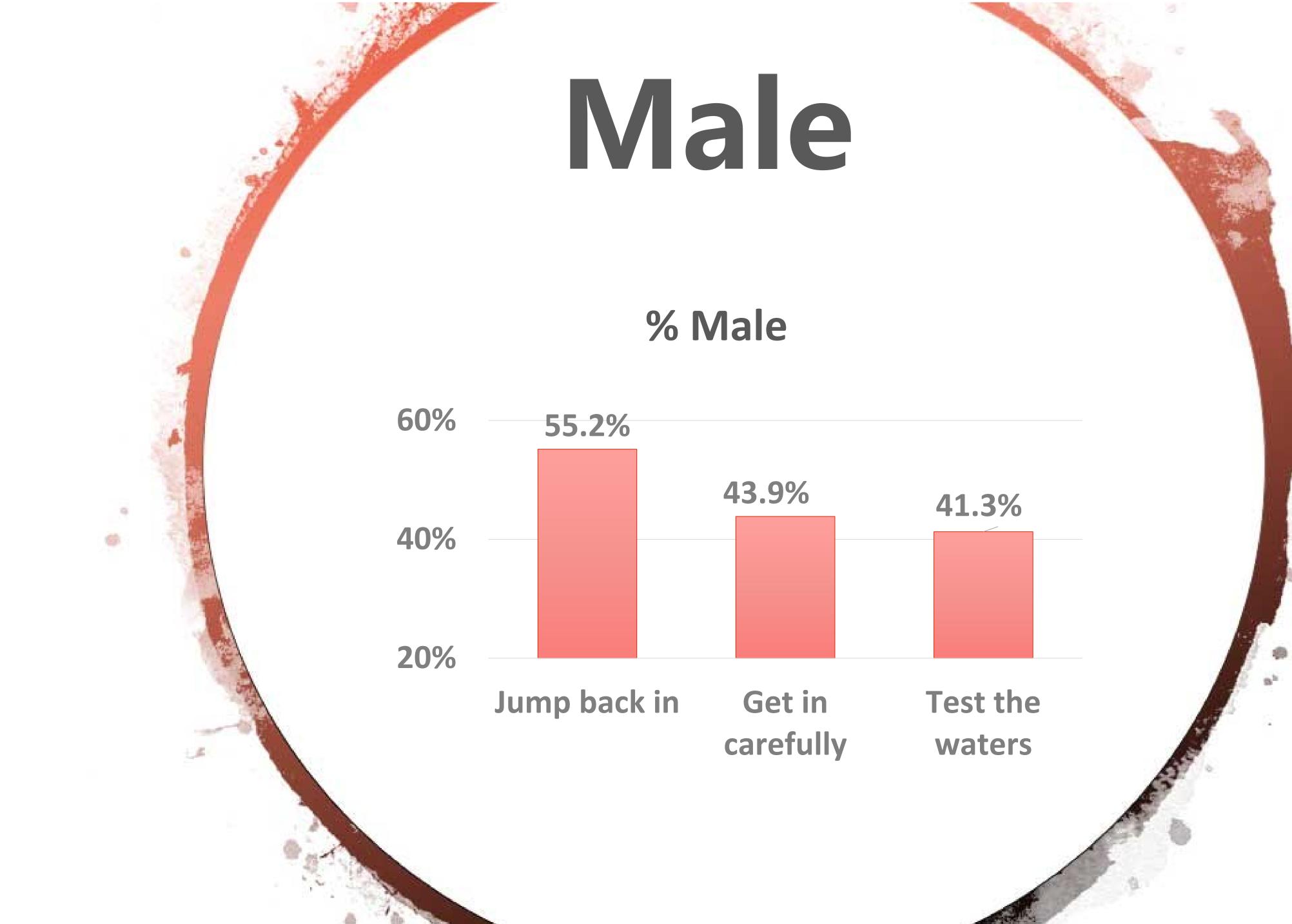


3

S.







# Different Travel Disability Profile

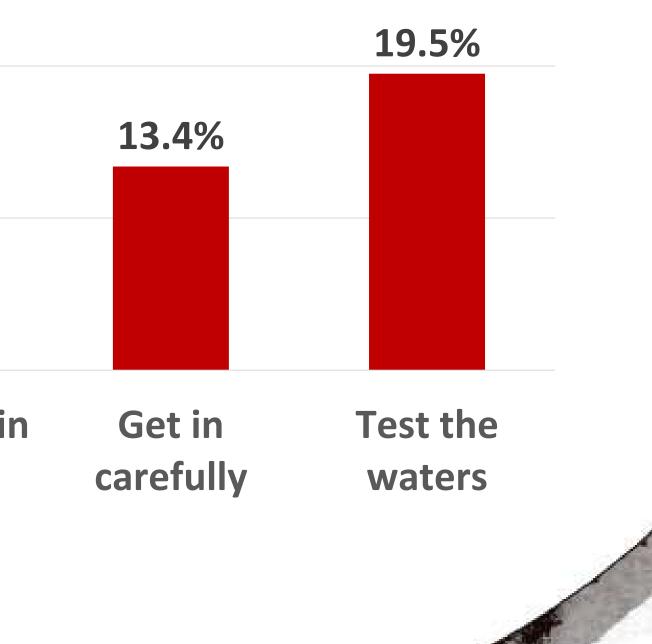
# % Traveling with a person with disabilities

30%

-

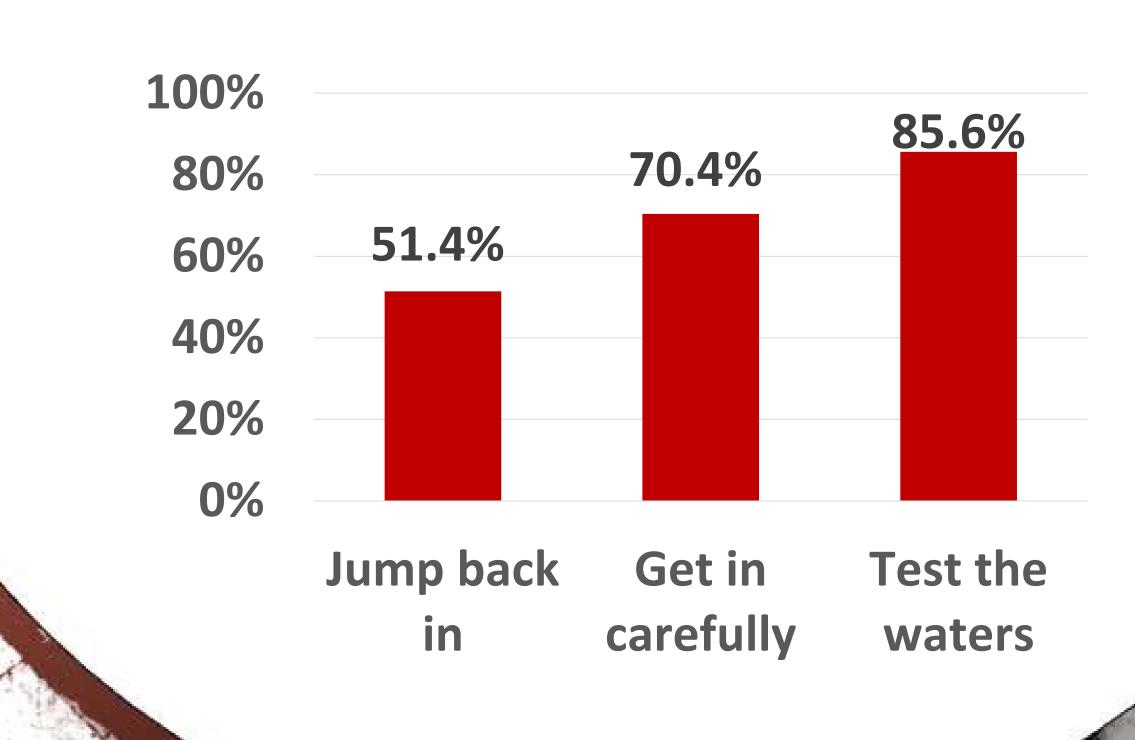
11.7% 10%

Jump back in

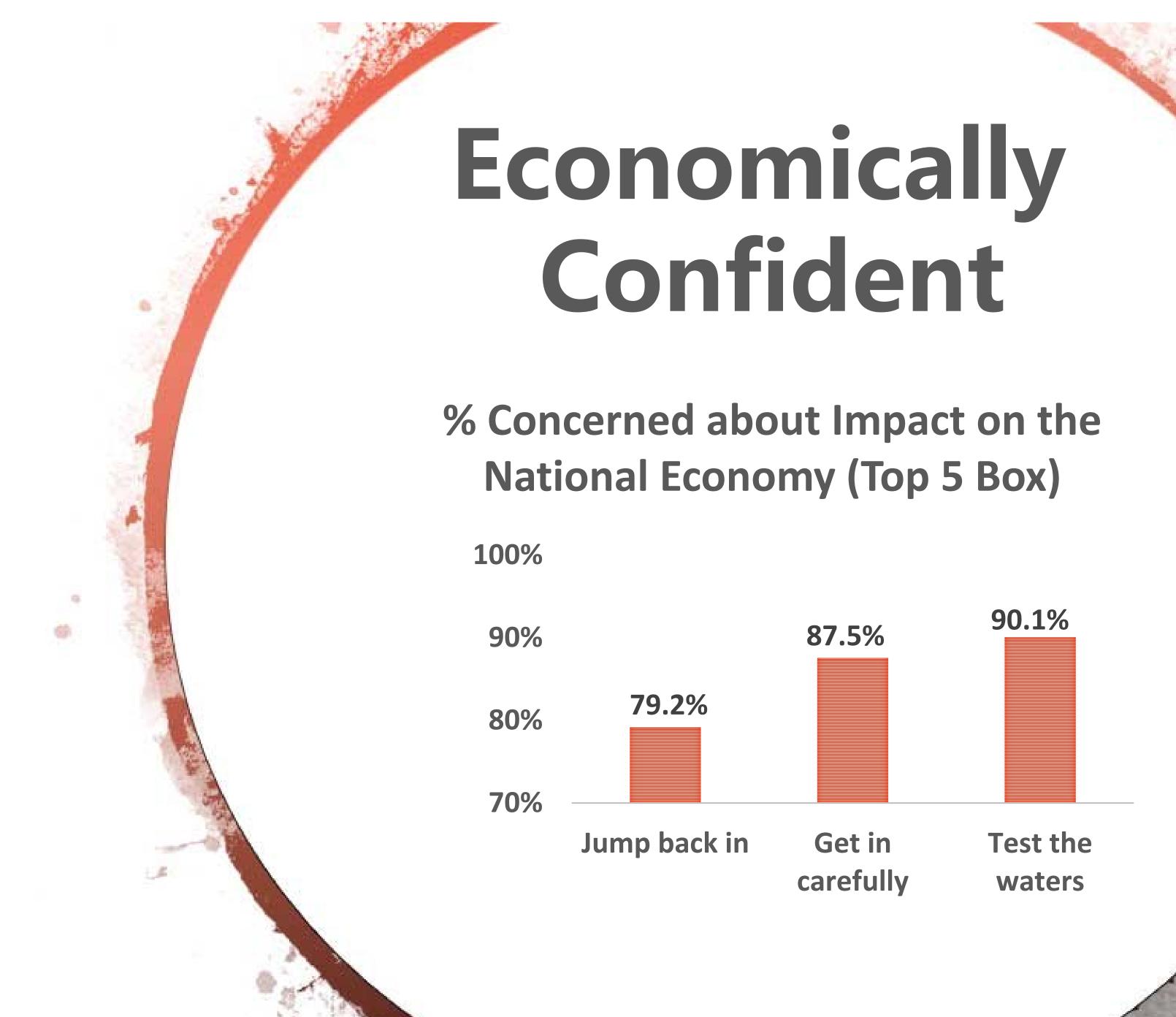


# Less Personally Fearful

# % Personally concerned about Contracting COVID-19 (Top 5 Box)



1.5



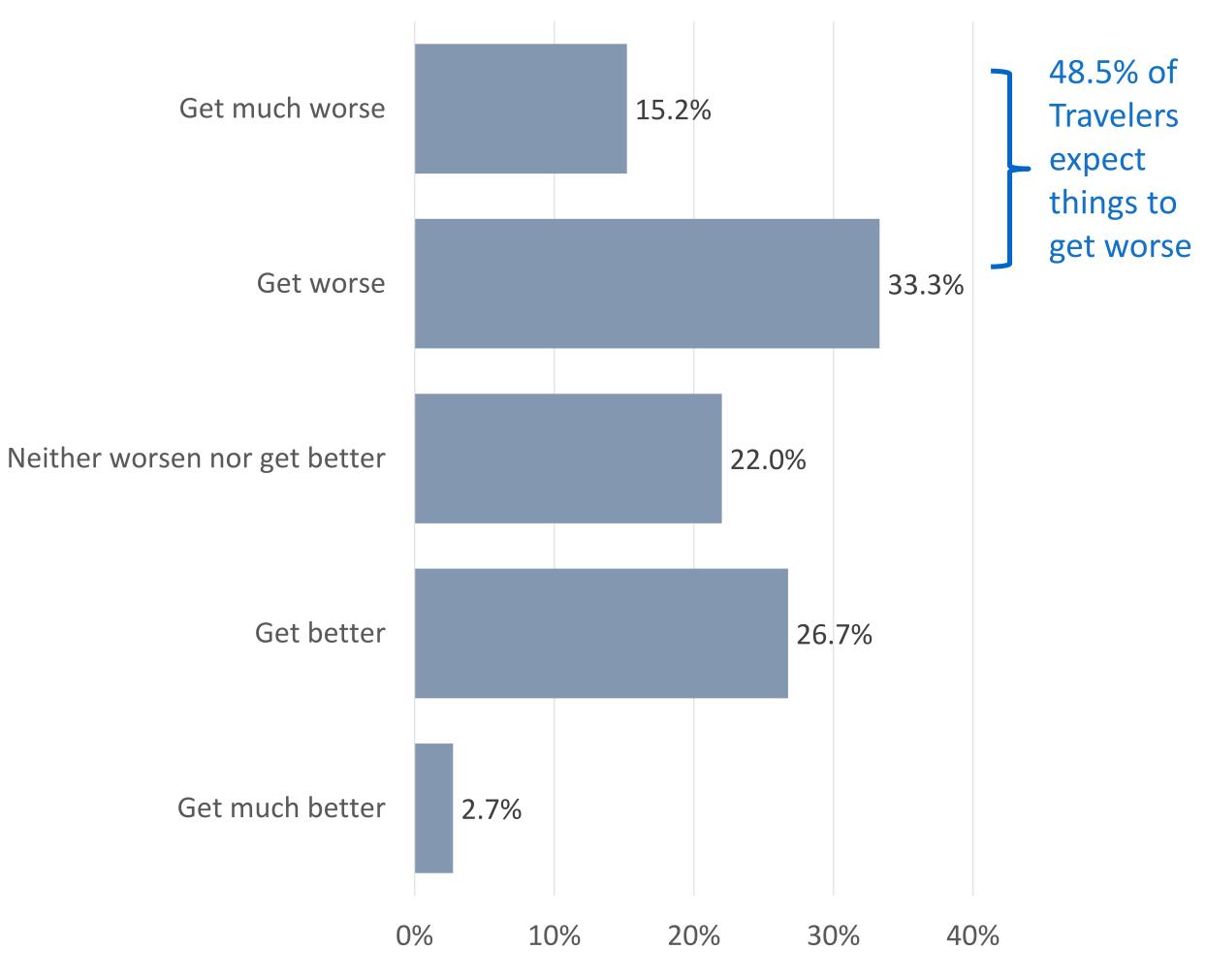
# **Expectations for Coronavirus Outbreak**

**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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

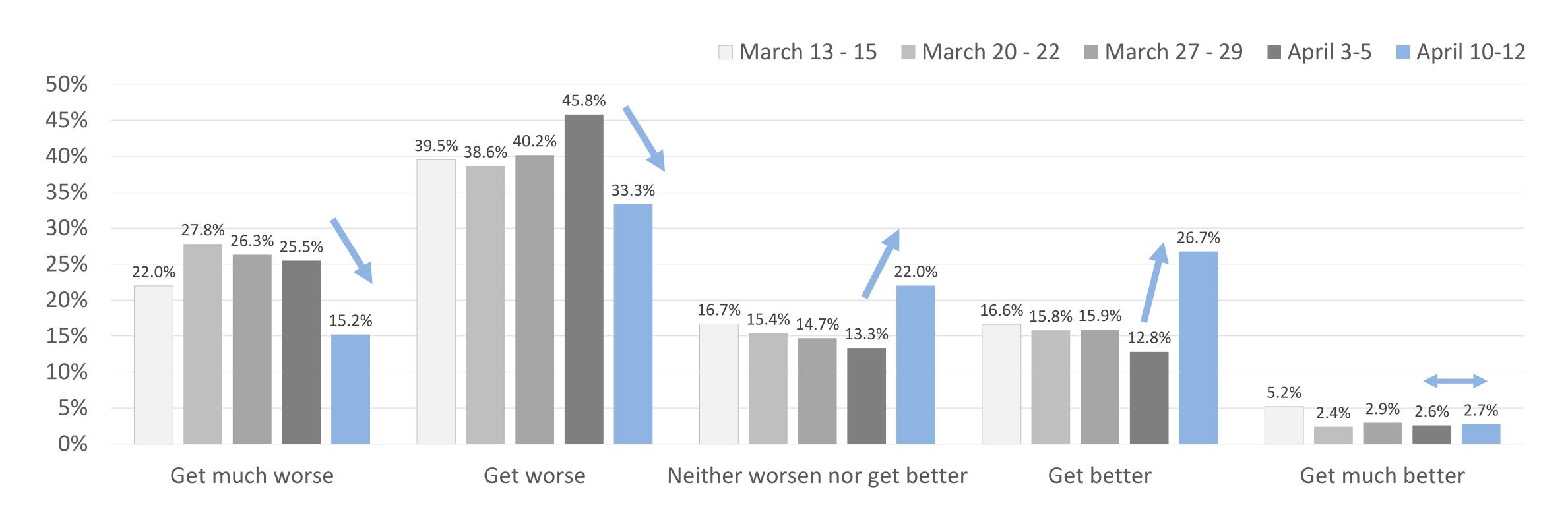




# Expectations for the Coronavirus Outbreak

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 \_\_\_\_\_





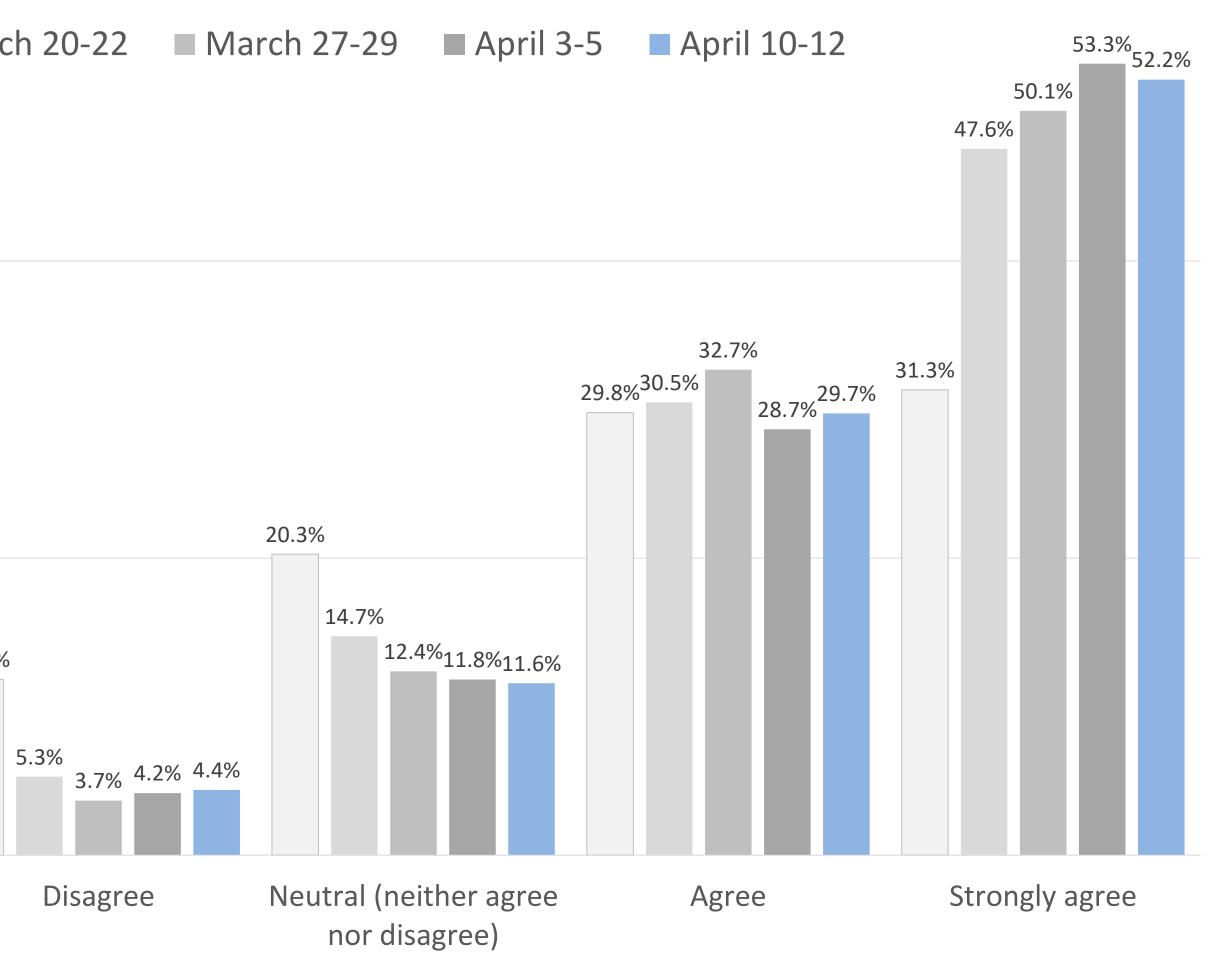


<sup>(</sup>Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

# Avoiding Travel Until the Crisis Blows Over

	60%		
How much do you agree with the following statement?	0070	March 13-15	March
Statement: I'm planning to avoid all travel until the coronavirus situation blows over.	40%		
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)	20%		11.8%
	0%	6.8% 2.0% 1.2% 2.1% 2.1% Strongly disagree	





# **Expectations for Summer Travel Season**

## How much do you agree with the following statement? **Statement:** I expect the coronavirus situation will be

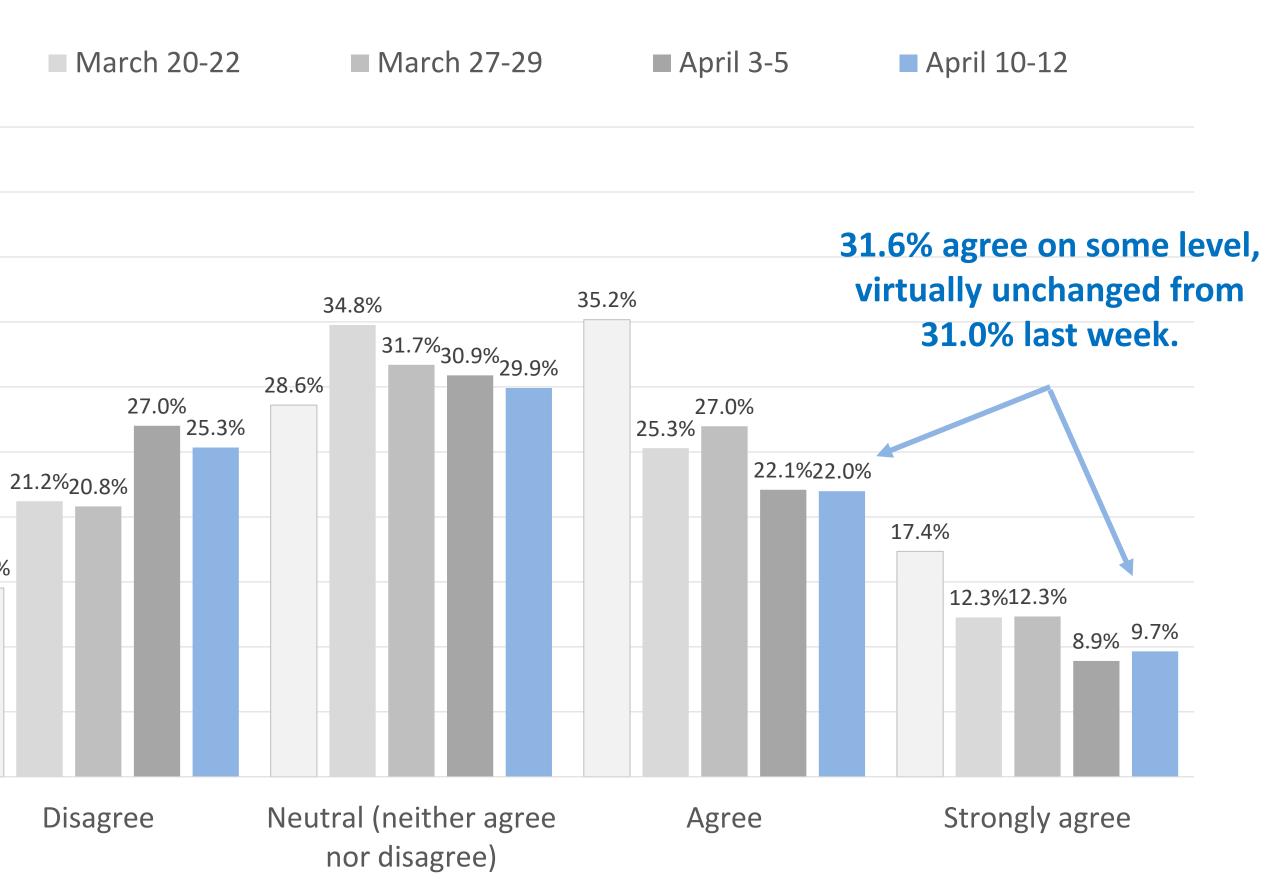
resolved before the summer travel season.

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

March 13-15 50% 45% 40% 35% 30% 25% 20% 14.5% 15% 13.1% 11.1% 10% 8.2% 6.5% 4.3% 5% 0%

Strongly disagree







How much do you agree with the
following statement?

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

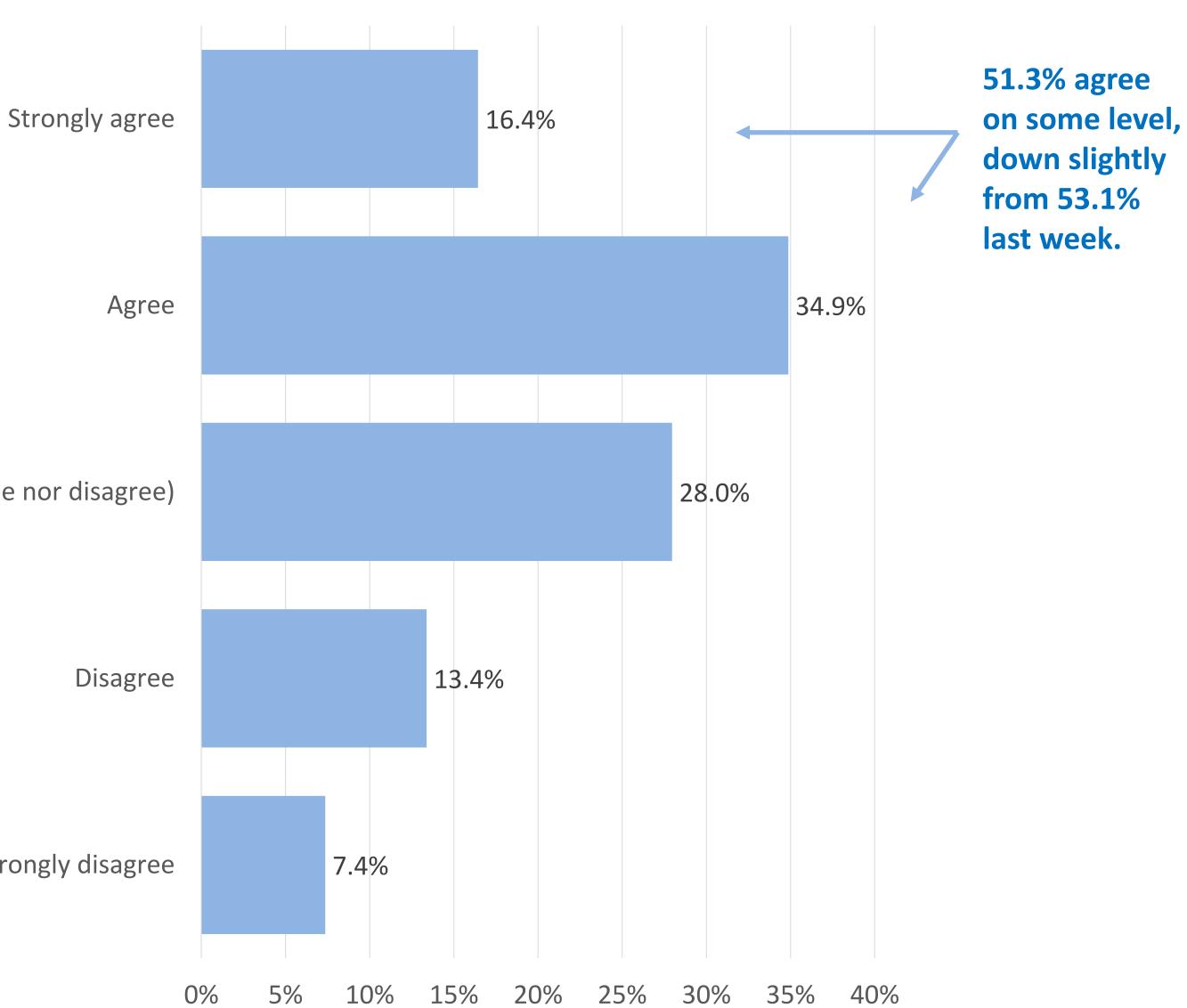
(Base: All respondents, 1,216 and 1,263 completed surveys. Data collected April 3-5, an 10-12 2020)

Neutral (neither agree nor disagree)

**Question Added in Wave 4** 

Strongly disagree





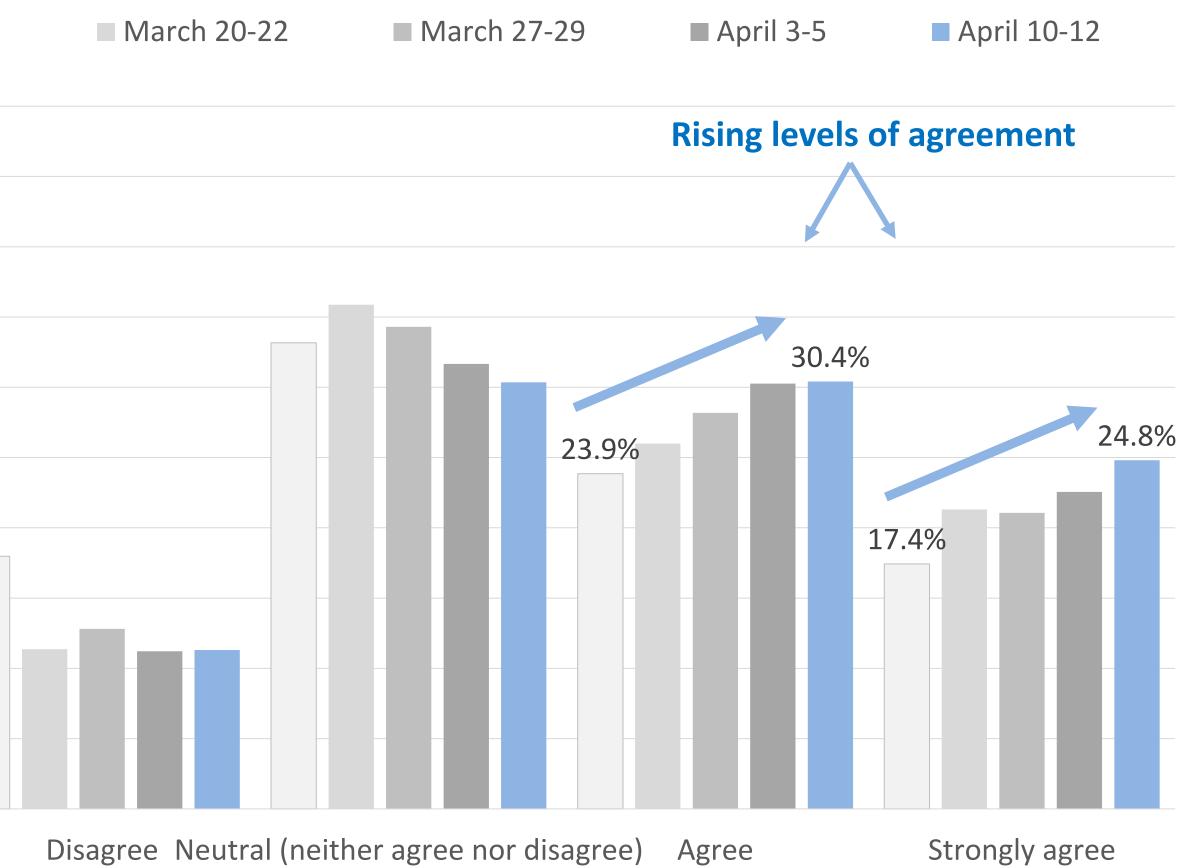
# Staycations as a Replacement for Vacations

How much do you agree with the following statement?		March 13-15
<b>Statement: Because of the</b>	50% —	
coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s).	45%	
	40%	
	35%	
(Base: All respondents, 1,201, 1,200,	30%	
1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15,	25%	
20-22, 27-29, April 3-5 and 10-12, 2020)	20%	
	15%	
	10%	
	5%	

0%

Strongly disagree





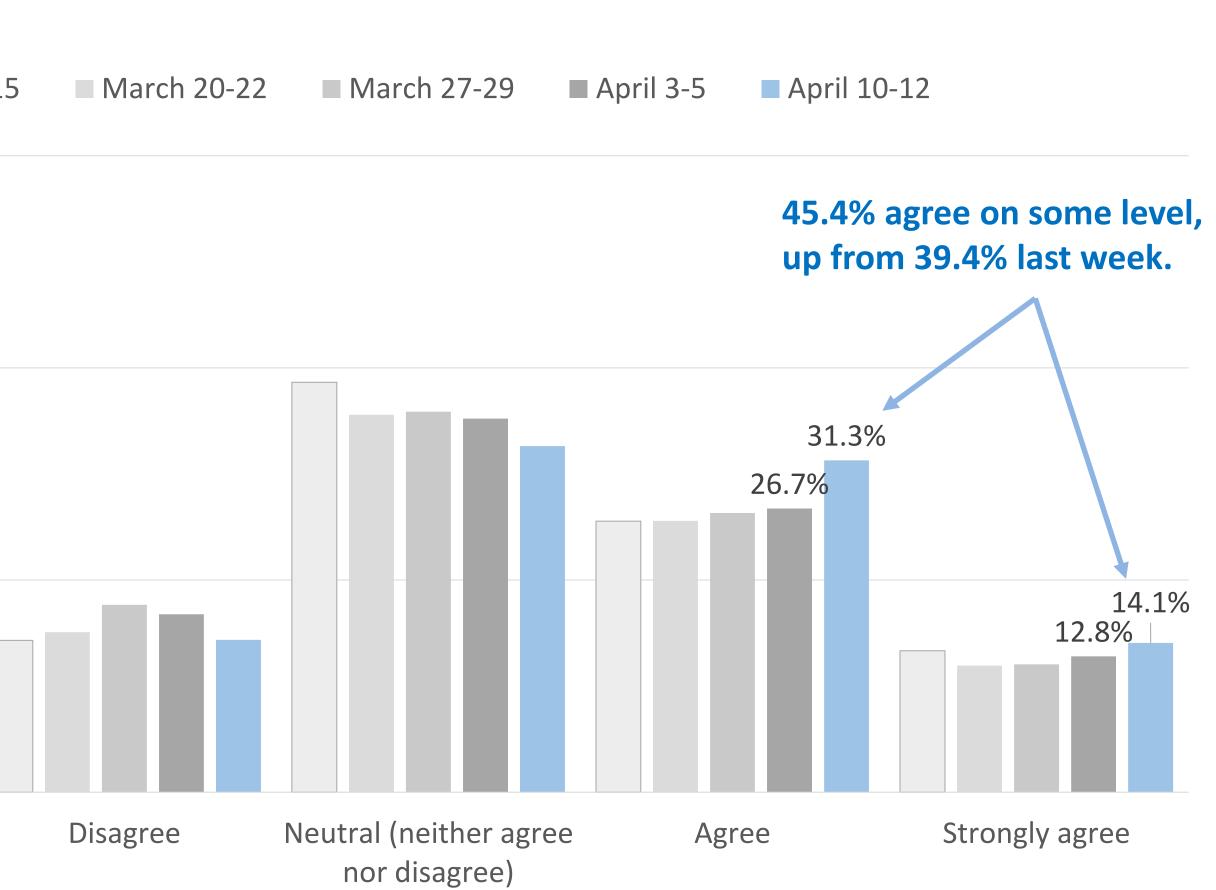
# Replacing Air Travel with Road Trips

How much do you agree with the following statement?		March 13-15
Statement: Because of the coronavirus, I'll probably be takin more road trips this year to avoid	60%	
airline travel.	40%	
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)	20%	

Strongly disagree

0%



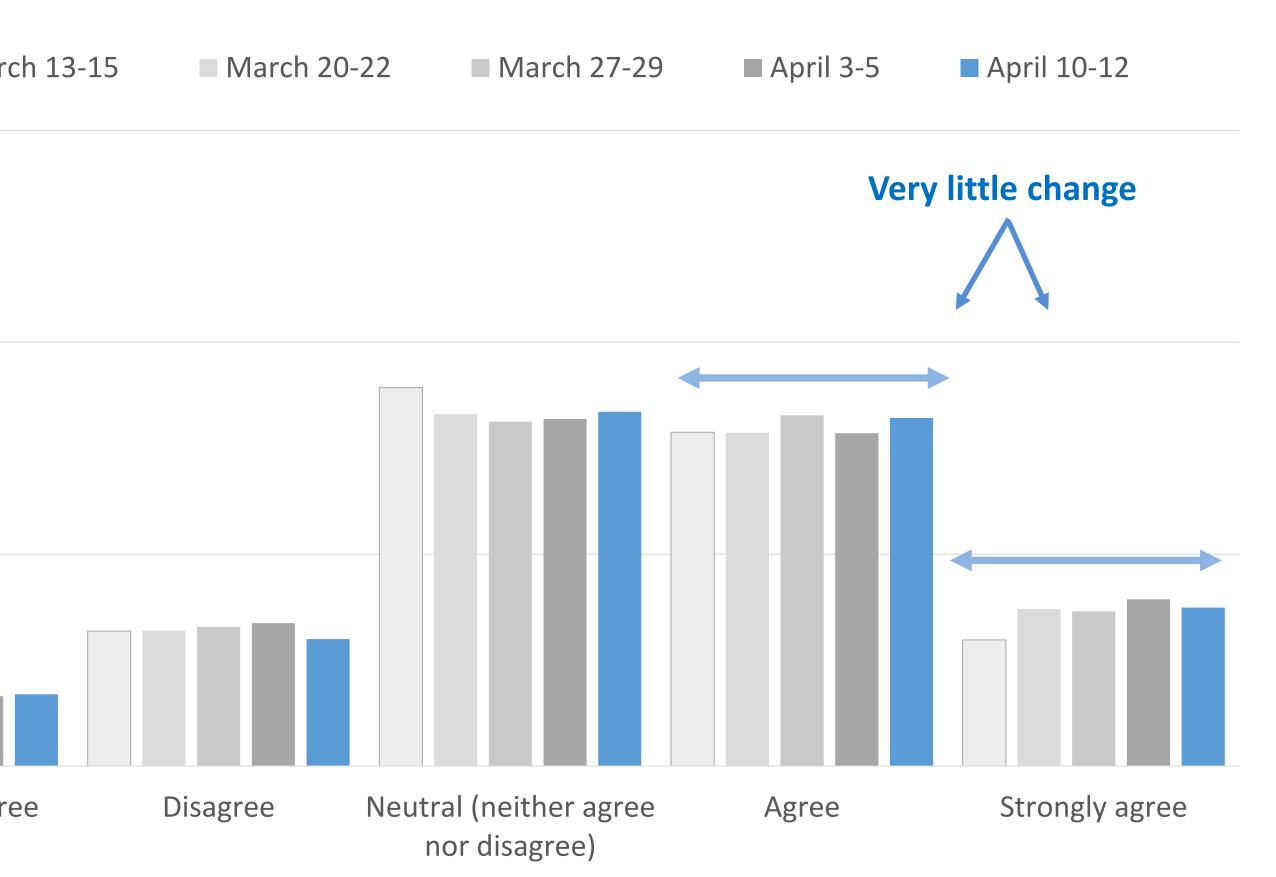


# Replacing Long-Haul Travel with Regional Trips

How much do you agree with the following statement?	60%	🗆 Mar
Statement: Because of the coronavirus, I'll probably be taking more regional trips (near	40%	
my home) and avoid long-haul travel (further from home).		
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12,	20%	
20-22, 27-29, April 3-5 und 10-12, 2020)	0%	

Strongly disagree





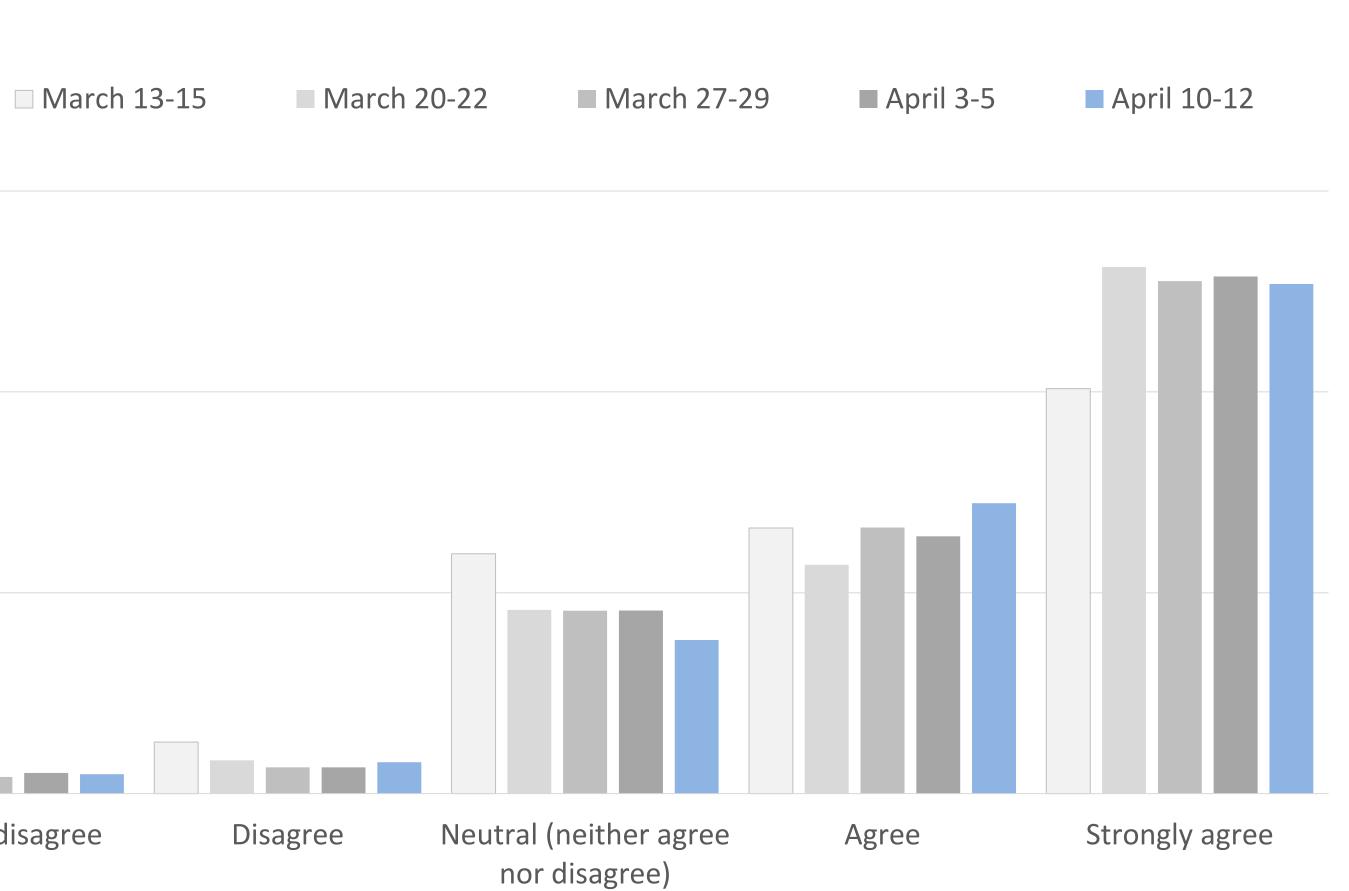
# **Avoiding Conventions & Conferences**

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, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12,

60%	
0070	
40%	
20%	
2070	
	I
0%	
	Strongly disagree



2020)



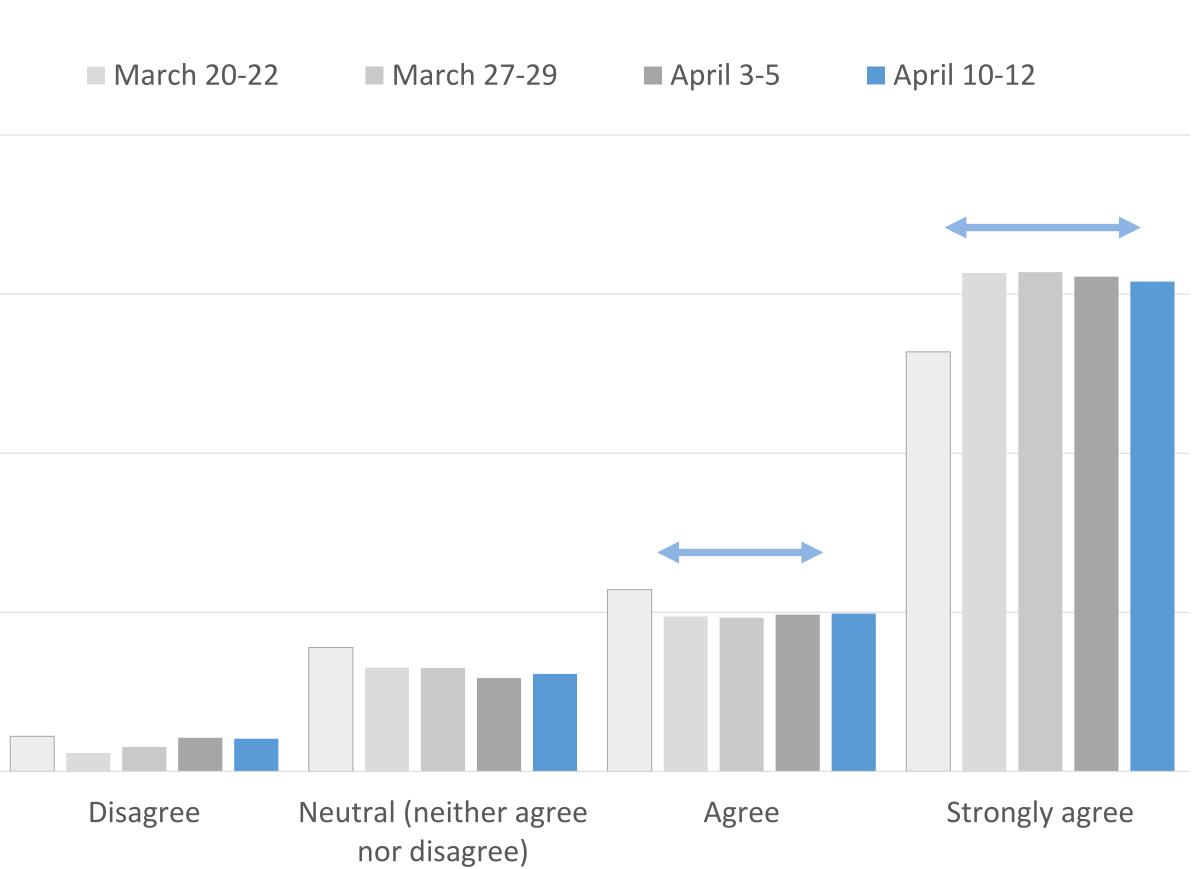
# **Avoiding International Travel**

How much do you agree with the following statement?	809
Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.	609
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15,	409
20-22, 27-29, April 3-5 and 10-12,	

2221	March 13-15
80%	
60%	
40%	
20%	
0%	Strongly disagree



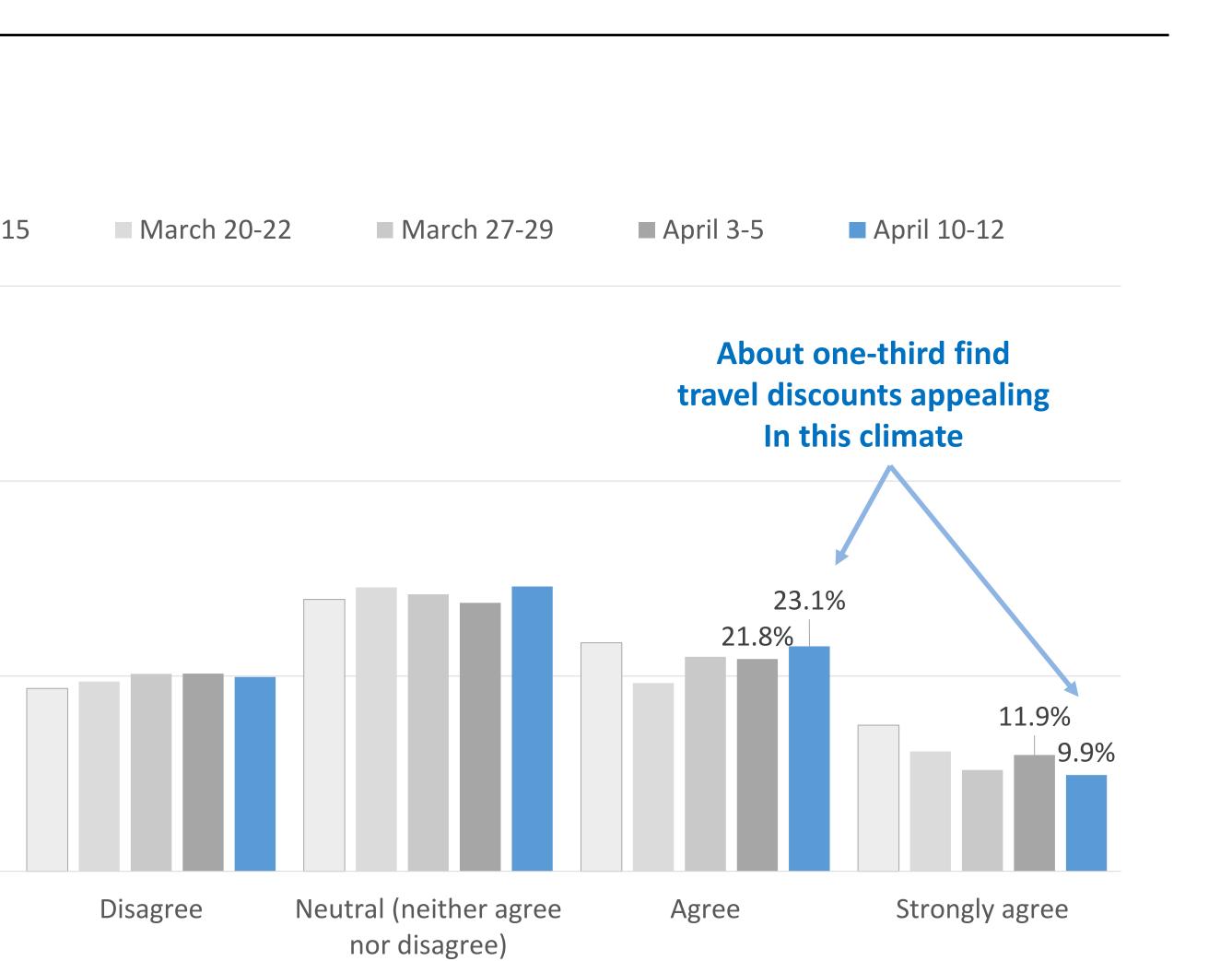
2020)



# **Discounts and Price Cuts**

How much do you agree with the following statement?		March 13-15
Statement: The coronavirus has led many travel providers to cut their	60%	
prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.	40%	
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)	20%	
	0%	Strongly disagree

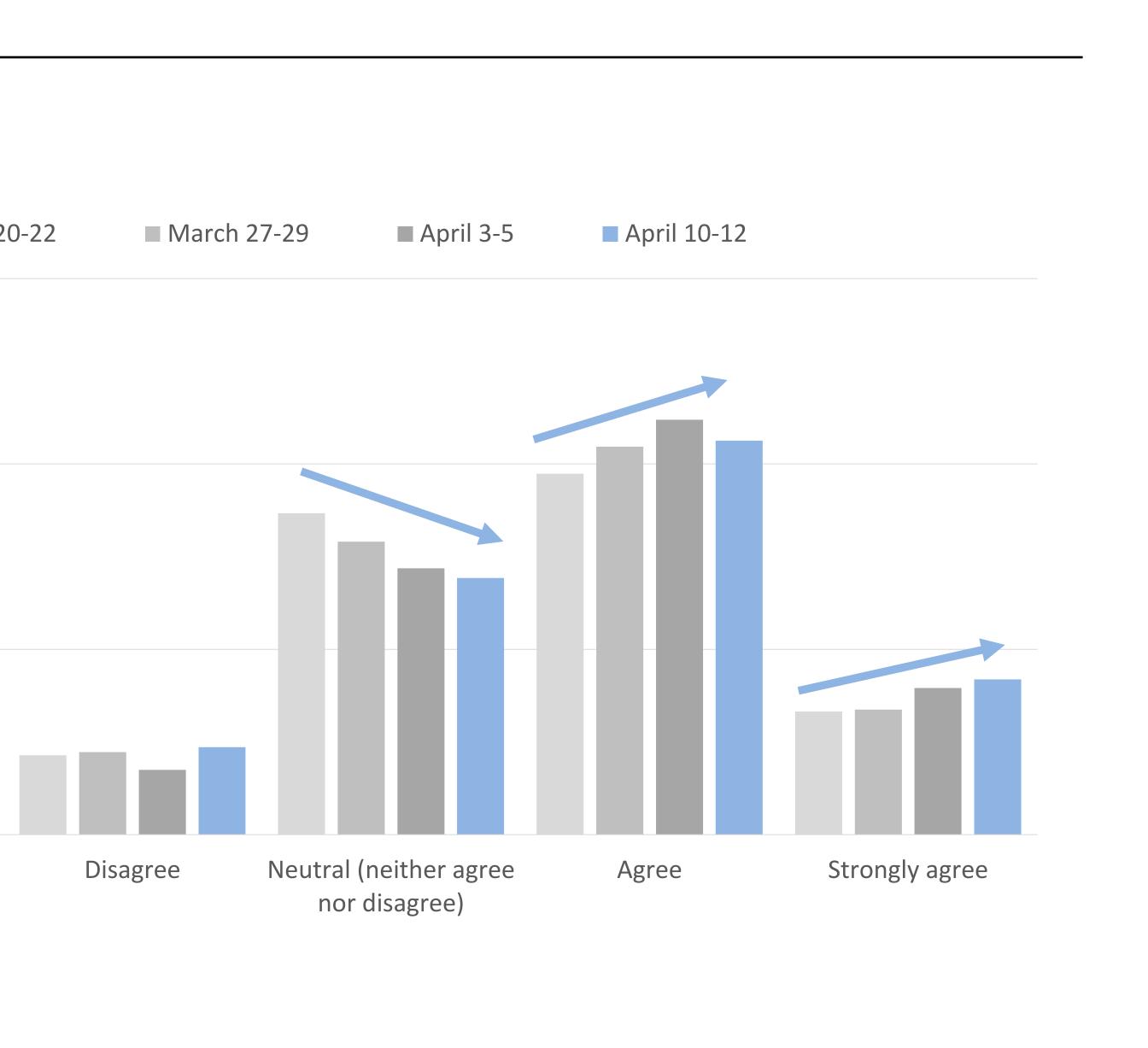




# Supporting Local Businesses

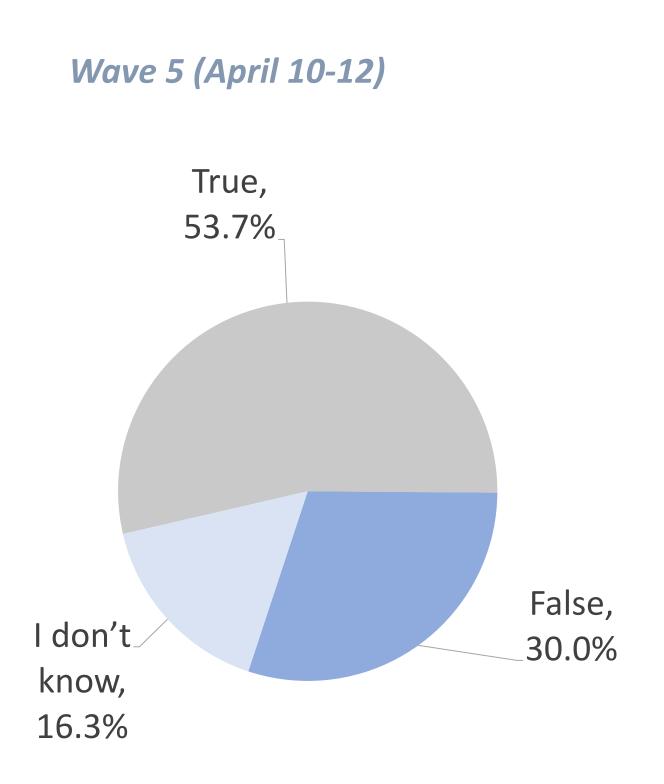
How much do you agree with the following statement?		March 20
Statement: I have been taking action to try to support local businesses where I live.	60%	
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29	40%	
and April 3-5, and 10-12, 2020) Question Added in Wave 2	20% —	
	0%	Strongly disagree





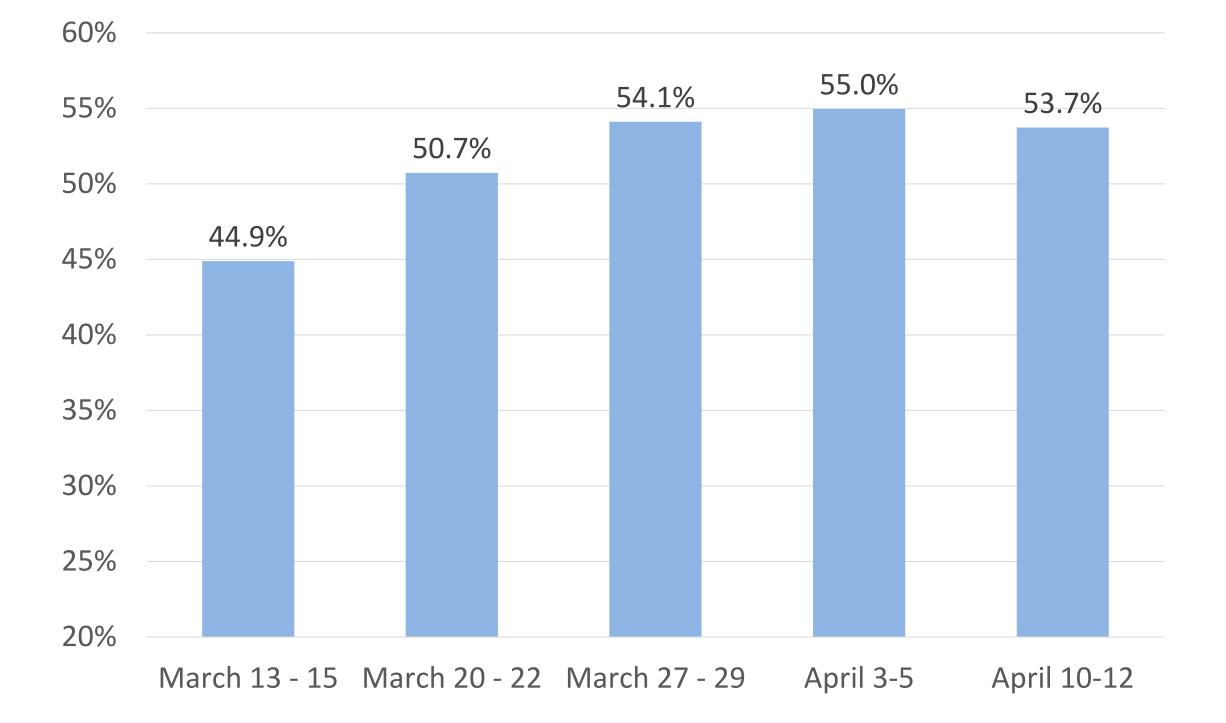
# **Business Travel Restrictions**

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



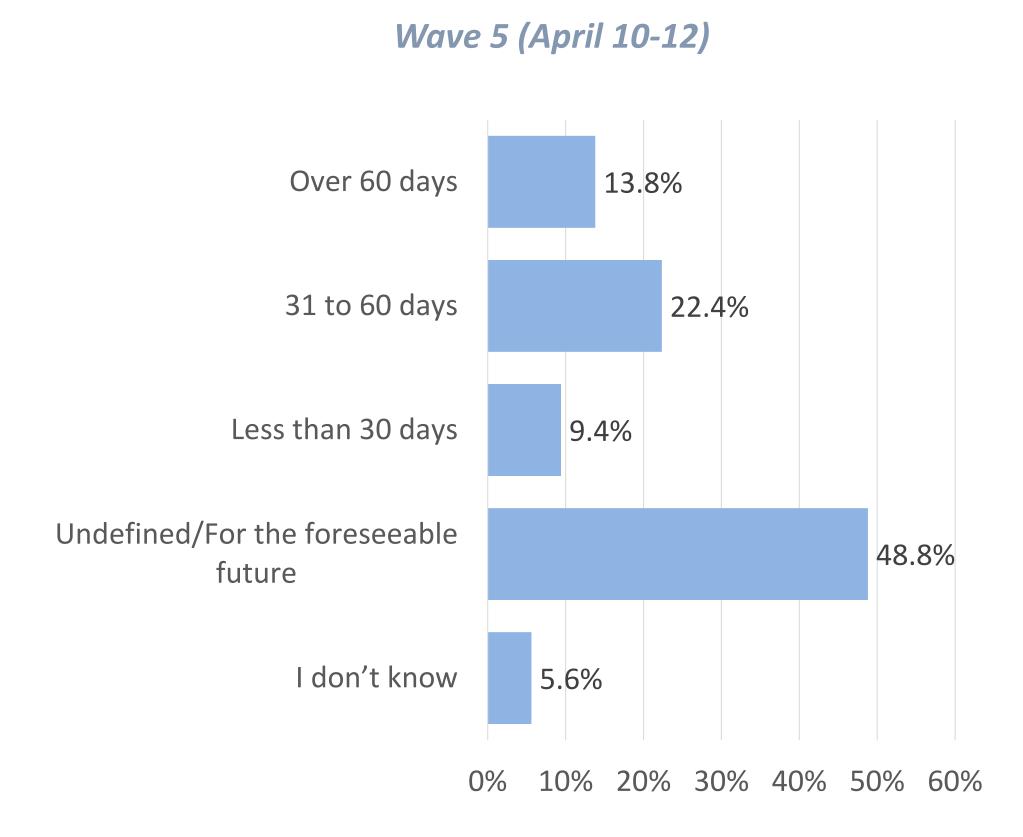
(Base: Employed respondents, 909, 916, 753 and 1,041 completed surveys. Data collected March 13-15, 20-22, 27-29 and April 3-5, 2020)





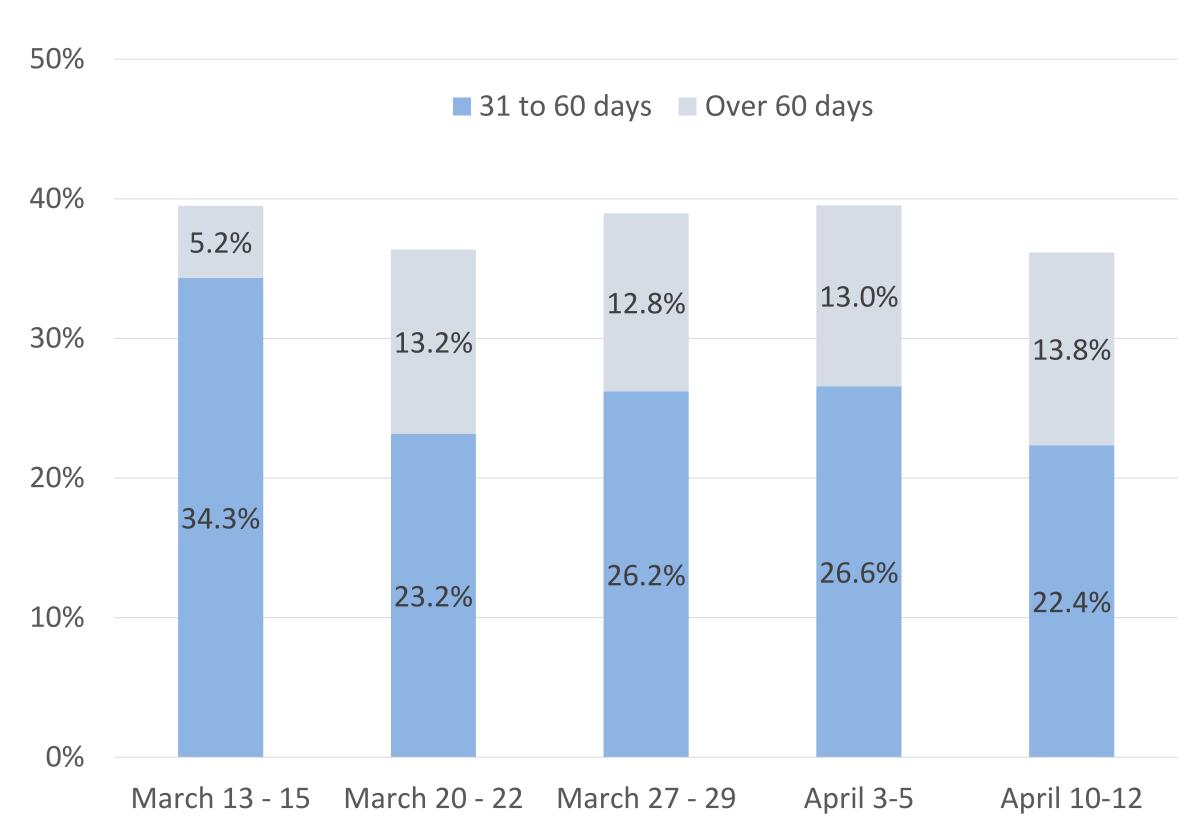
# **Business Travel Restrictions**

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



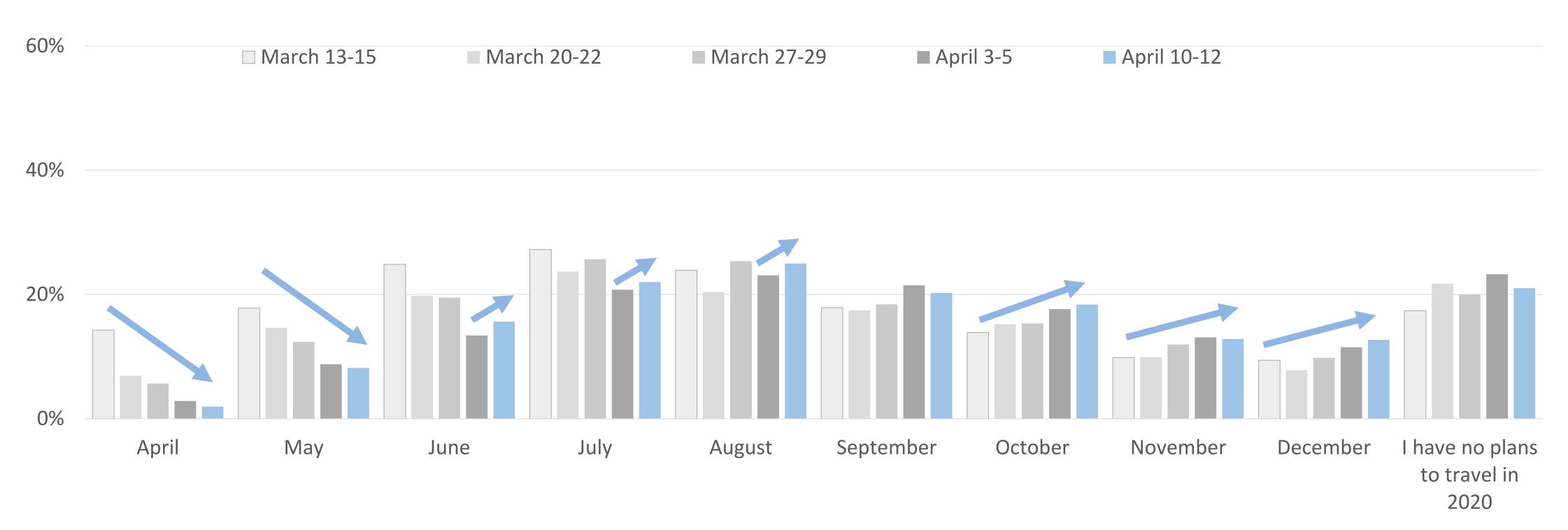
(Base: Employed respondents with travel restrictions, 488, 371, 488, 581 and 616 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)





# **Upcoming Travel Plans**

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





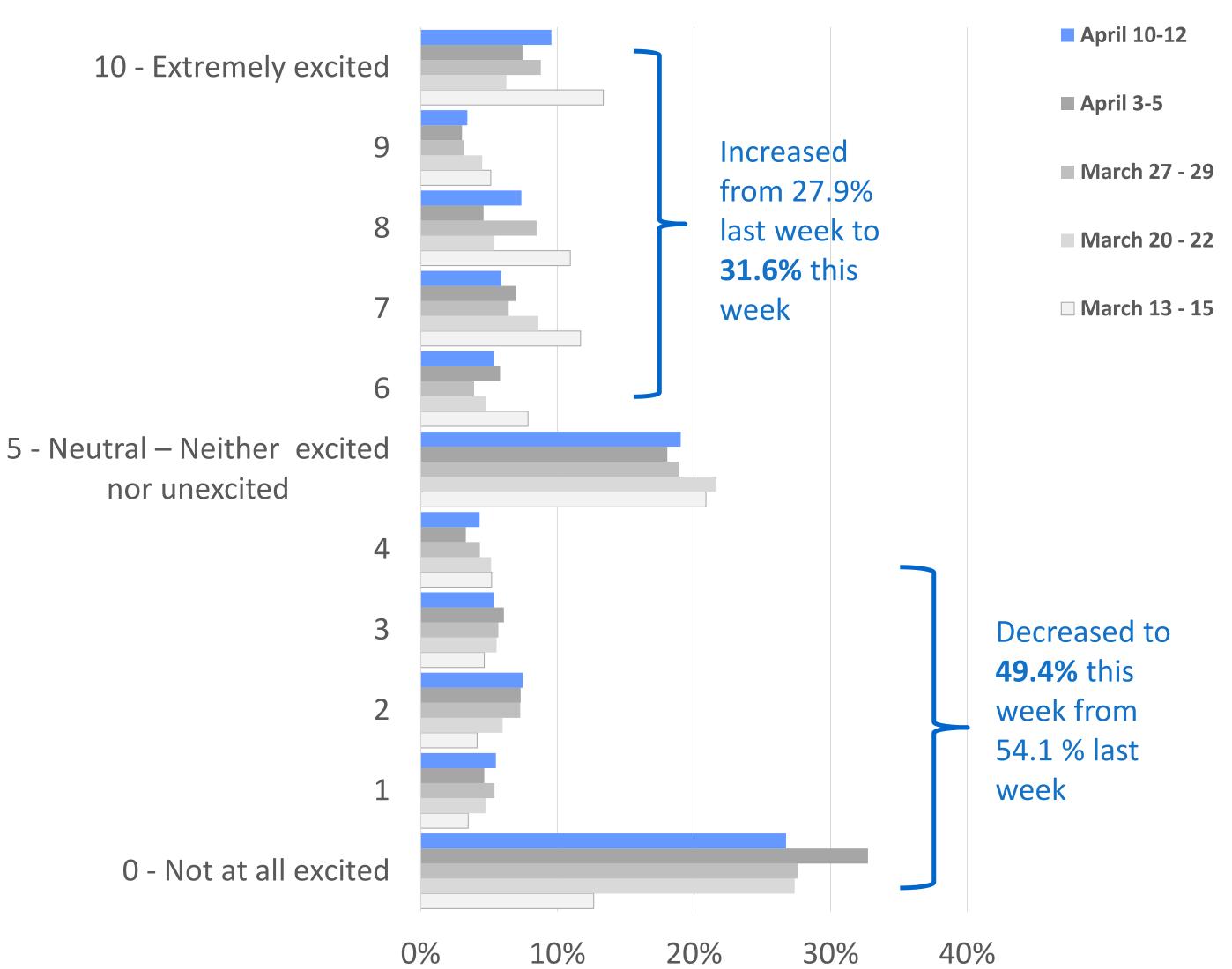
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

**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, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)



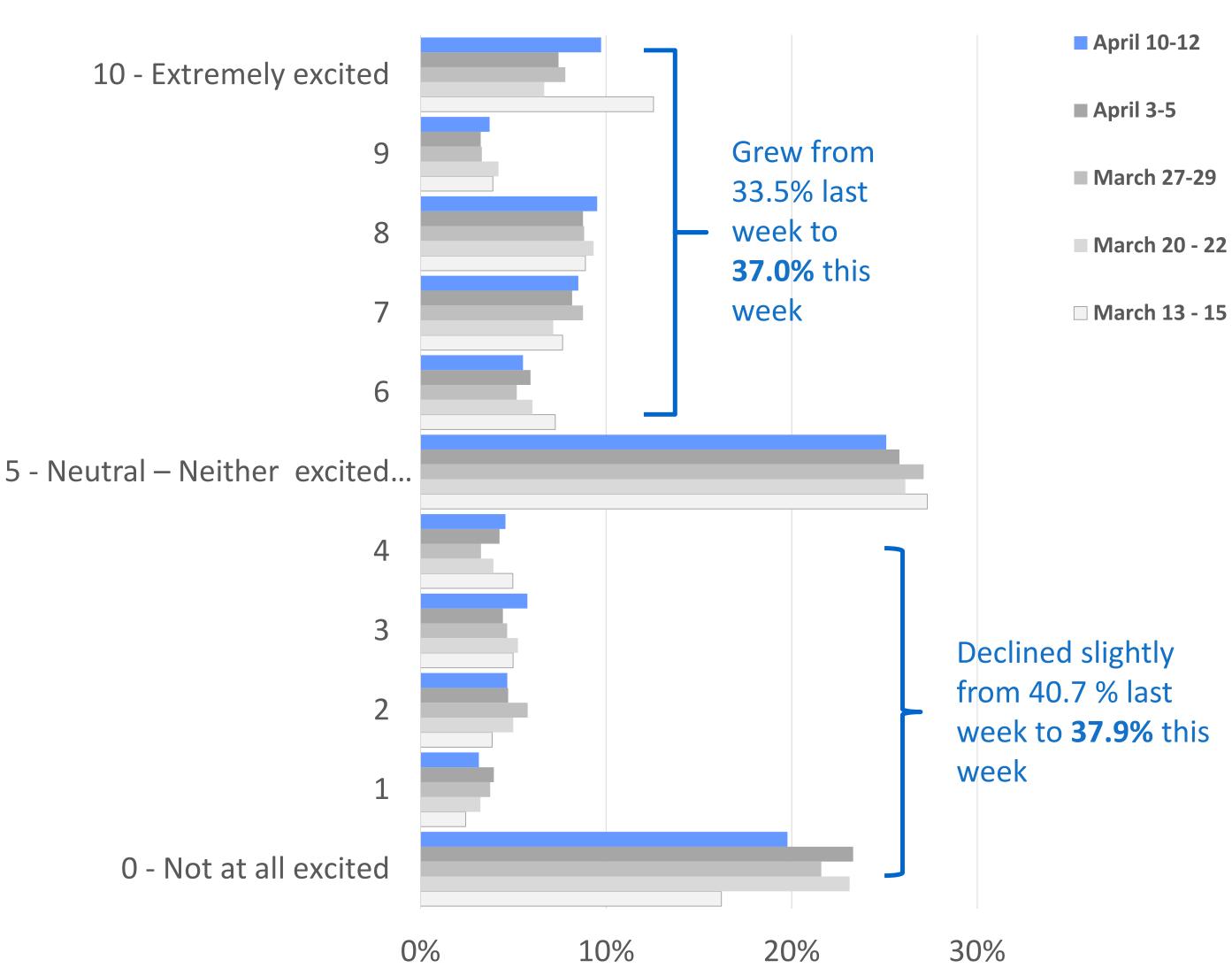


# **Openness to Travel Information**

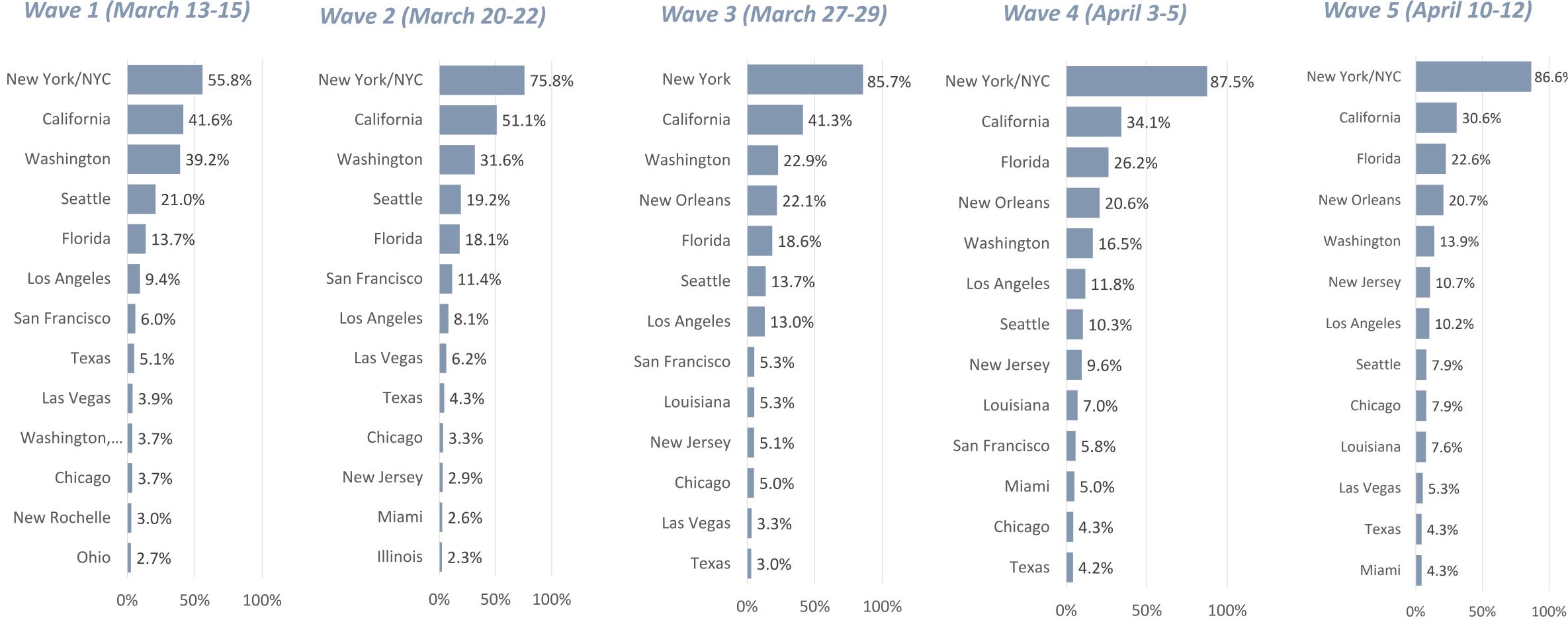
**Question:** At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

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





# Most Talked About Coronavirus Hotspots





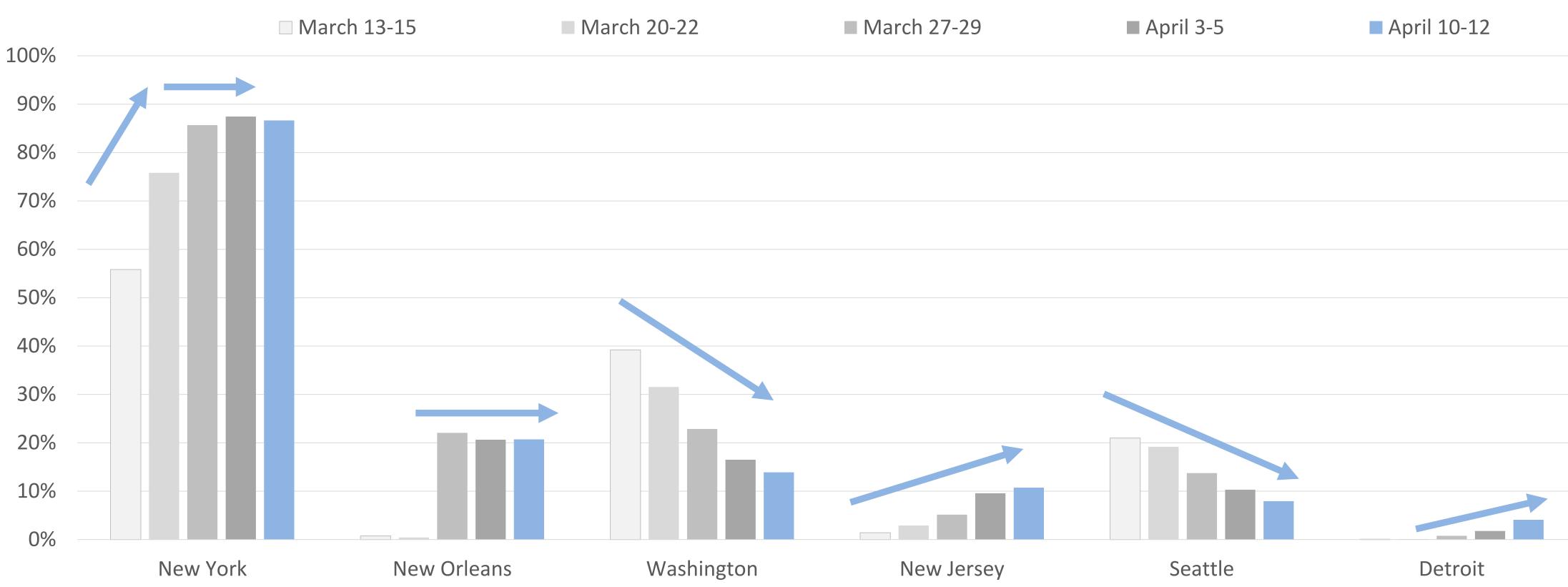
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

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

86.6%



# Most Talked About Coronavirus Hotspots







<sup>(</sup>Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

# 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	New
during 2020.	New
	San F
<b>Question 2:</b> Now please imagine the period of time immediately after the coronavirus situation blows	
over.	Los
How interested will you likely be in visiting these destinations in the SIX (6) MONTHS immediately after	La

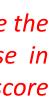


the coronavirus situation blows over.

## **Top 2 Box Score** (Extremely interested or Interested)

Numbers in red are the percentage decrease in the Top 2 Box score

	P	re-Covid	19 Po	st Covic	19		I	
York City			21.6%	34.	6%			-37.6%
w Orleans			21.8%	34.	3%			<b>-36.4%</b>
Seattle			20.3%	29.4%				-31.1%
Francisco			24.1	33.8	3%			<b>-28.8%</b>
Hawaii					38.7%		51.9%	-25.4%
s Angeles			24.3	31.9% %	0			<b>-24.0%</b>
Las Vegas				31.4%	41.2	%		-23.8%
Florida				3	6.6%	47.	1%	-22.4%
0	% 10	)% 20	% 30	)% 4	0%	50%	60%	6



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.



Santa Nevada Mon North Card

The Ala

(Extreme	Numbers in red are th percentage decrease i the Top 2 Box scor				
	Pre-Covid	19	Post	t Covid 19	
Anchorage, Alaska			27	34.1% .2%	-25.2%
Puerto Rico			28 22.5%	8.0%	-24.5%
Barbara, California			26 21.7%	.9%	<b>-23.9%</b>
(areas beyond Las Vegas)			28 22.8%	8.1%	-23.2%
ntana (the state of)			28 24.69	8.0% %	-14.2%
rolina (the state of)			27	30.8% .1%	-13.6%
labama Gulf Shores area			23.8% 22.0%	0	-8.2%
	0% 10	)% 20%	5 <b>30</b>	% 409	%

the in ore

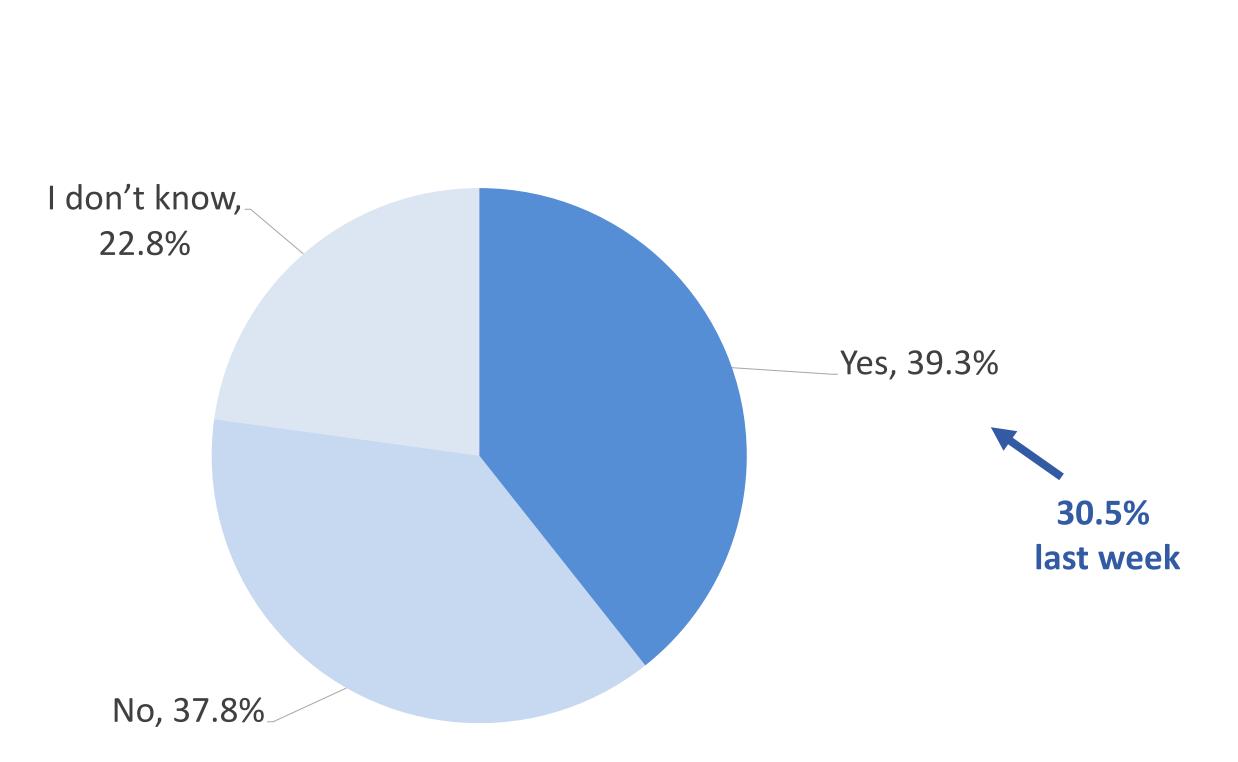
Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit?

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

(Base: All respondents, 1,216 and 1,263 completed surveys. Data collected April 3-5, and 10-12, 2020)

**New Question Added in Wave 3** 





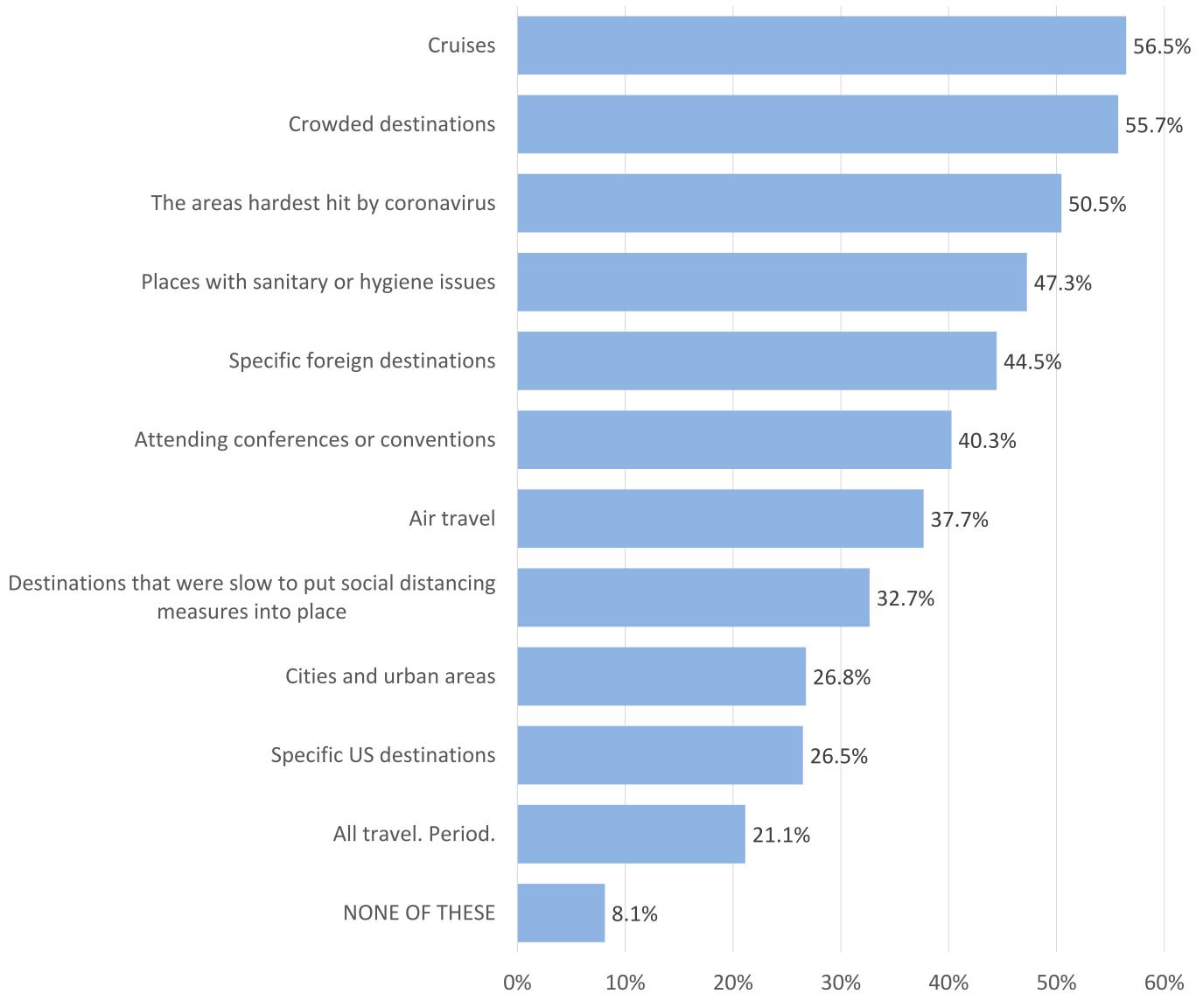
**Question:** Do you expect that you will avoid any of the following in the SIX (6) MONTH period immediately after the coronavirus situation is resolved? (Select all that would complete the following sentence for you)

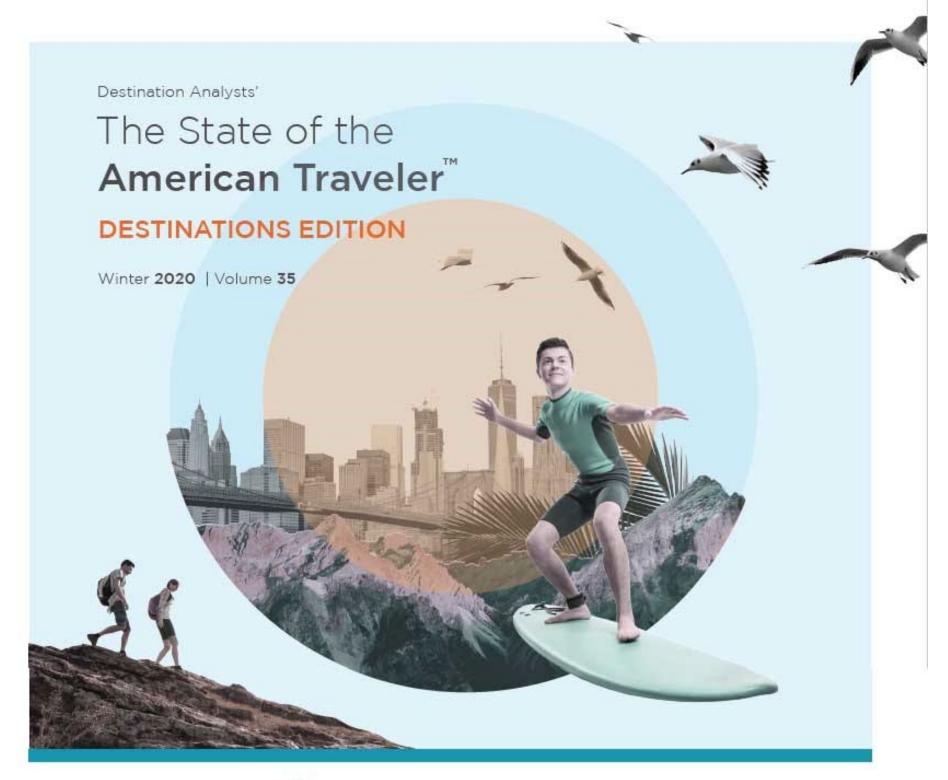
I will most likely avoid

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

Wave 5 Data







#### Destination 🔷 Analysts

#### The Destinations Edition

THE DESTINATIONS EDITION of *The State of the American* spending and b *Traveler*<sup>™</sup> finds a high baseline level of leisure traveler that as the curre optimism, yet the unfortunate outbreak of coronavirus will power the indus undoubtedly greatly dampen expectations in the near-term. If you should have The survey of American leisure travelers was taken in the we welcome yo early stages of the outbreak, before the virus was noted in info@destination the United States. The overall outlook at the time of our poll @DA\_Research was strong, with high levels of travel optimism, expected

spending and budgetary prioritization. Our hopes are that as the current crisis passes, this baseline optimism will power the industry's success as the year moves forward. If you should have questions or ideas for future survey topics, we welcome you to message us: Info@destinationanalysts.com or @DA\_Research.

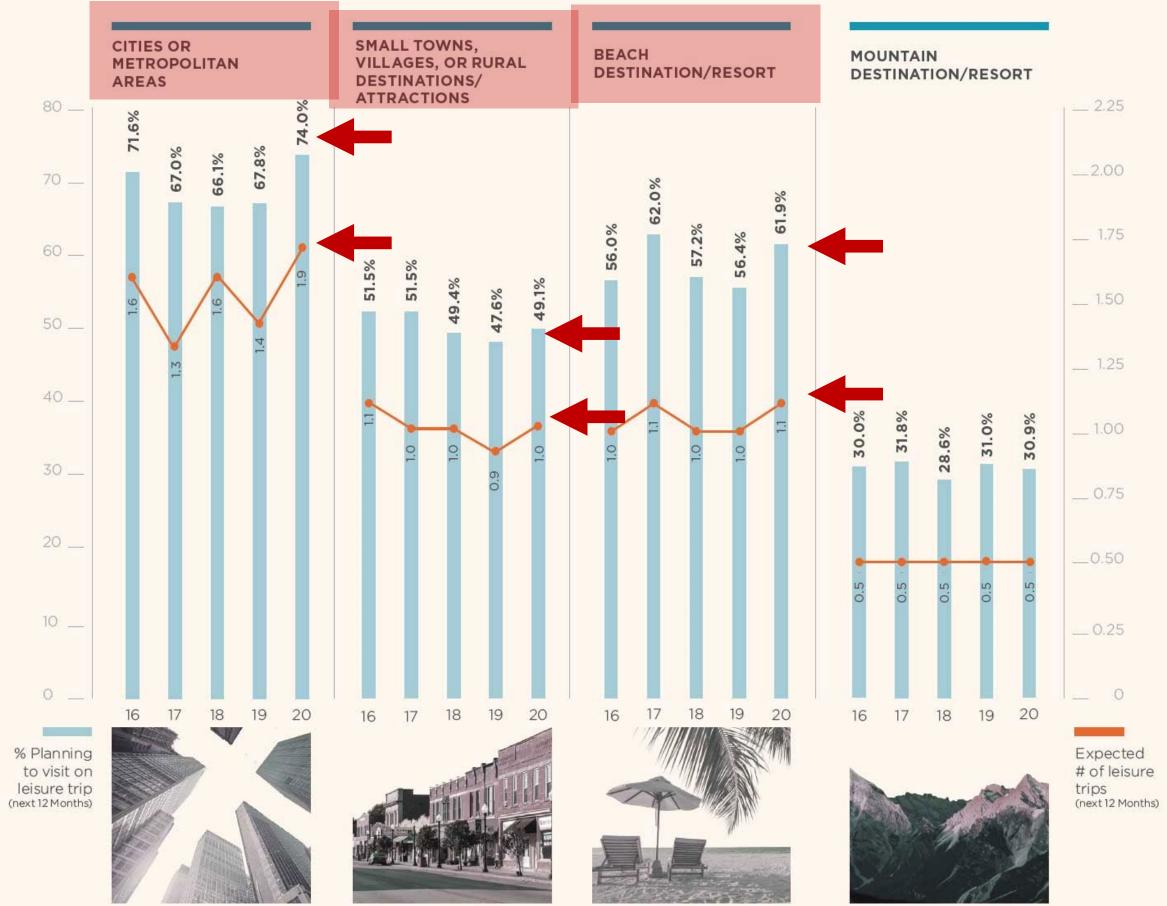


info@destinationanalysts.com

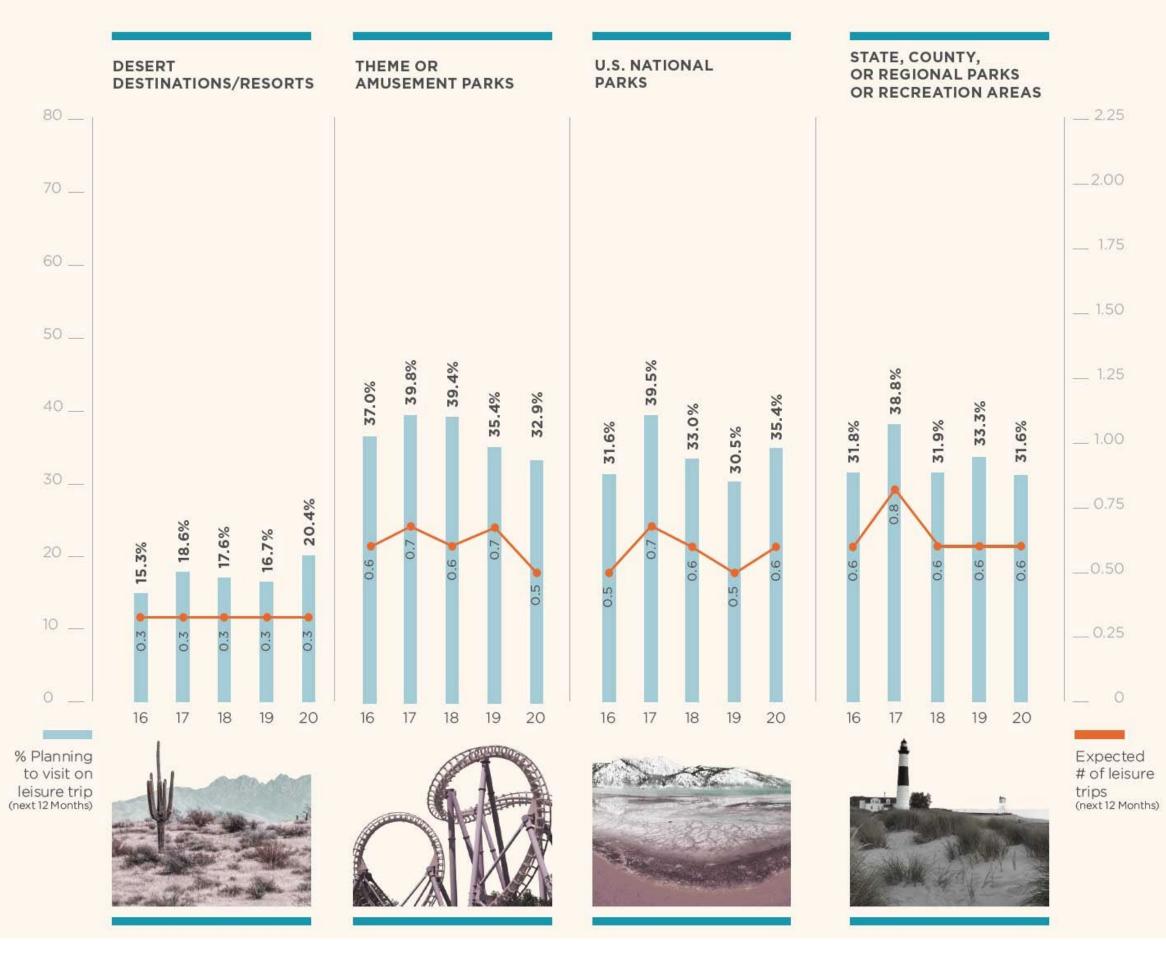
#### **Destinations Edition, January 2020**

Asked a simple expectations question:

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



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



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

\_\_\_\_ 2.25 \_2.00 \_ 1.75 \_ 1.50 \_ 1.25 1.00 \_ 0.75 \_0.50 0.25 0 Expected # of leisure

#### First Trip After the Pandemic

**Question:** Imagine it is sometime later when you're first begin feeling it is safe to travel again for leisure.

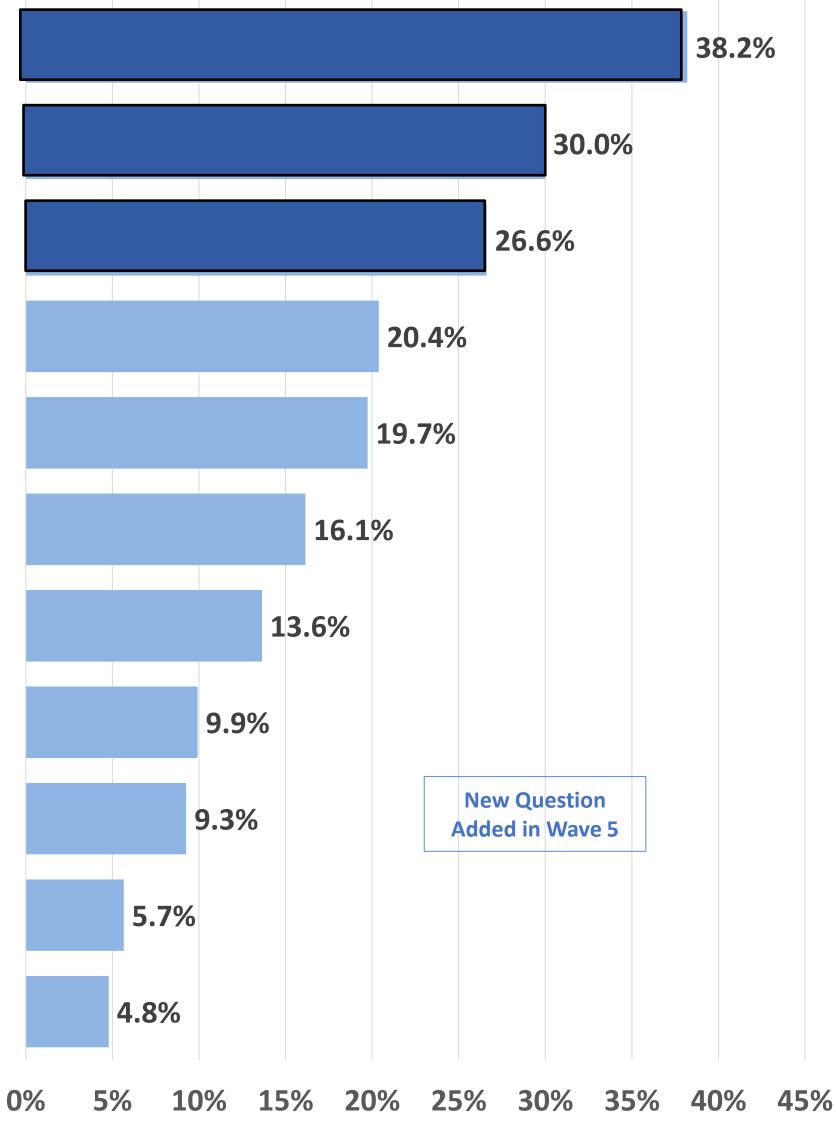
#### Which best describes the places you will visit on THE FIRST TRIP YOU WILL TAKE?

(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)

**Beach destinations/resorts Cities or metropolitan areas U.S. National Parks** State, county or regional parks or recreation areas Theme or amusement parks **Desert destinations/resorts Campground or cabin site Cruise trip RV or motorhome trip** 



Small towns, villages or rural destinations/attractions **Mountain destinations/resorts (including ski resorts)** 



### Beach & Rural Destinations

Will there be an opportunity to?

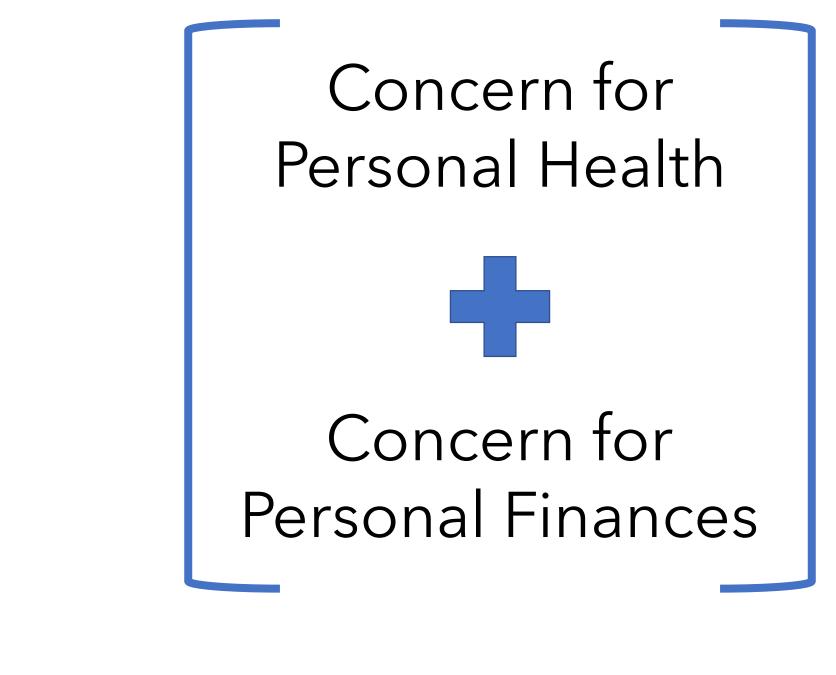
- Position themselves as attractive post-pandemic alternatives to urban centers
- •Grow new market share
- Introduce themselves to new visitors



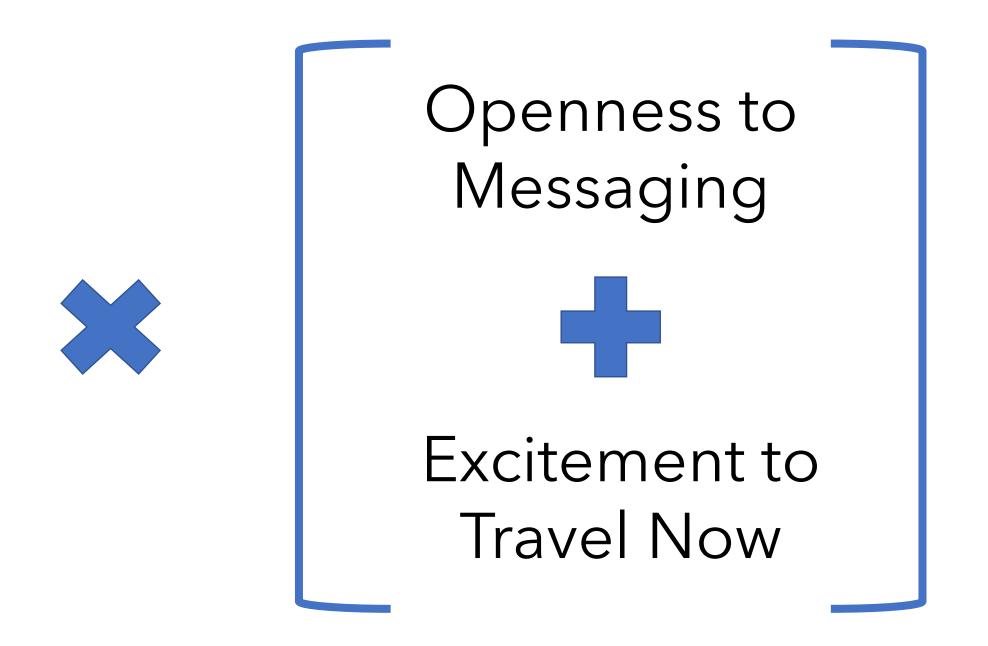
# Coronavirus Research Index Calculation

Week 5 Summary

# Raw Index Formula

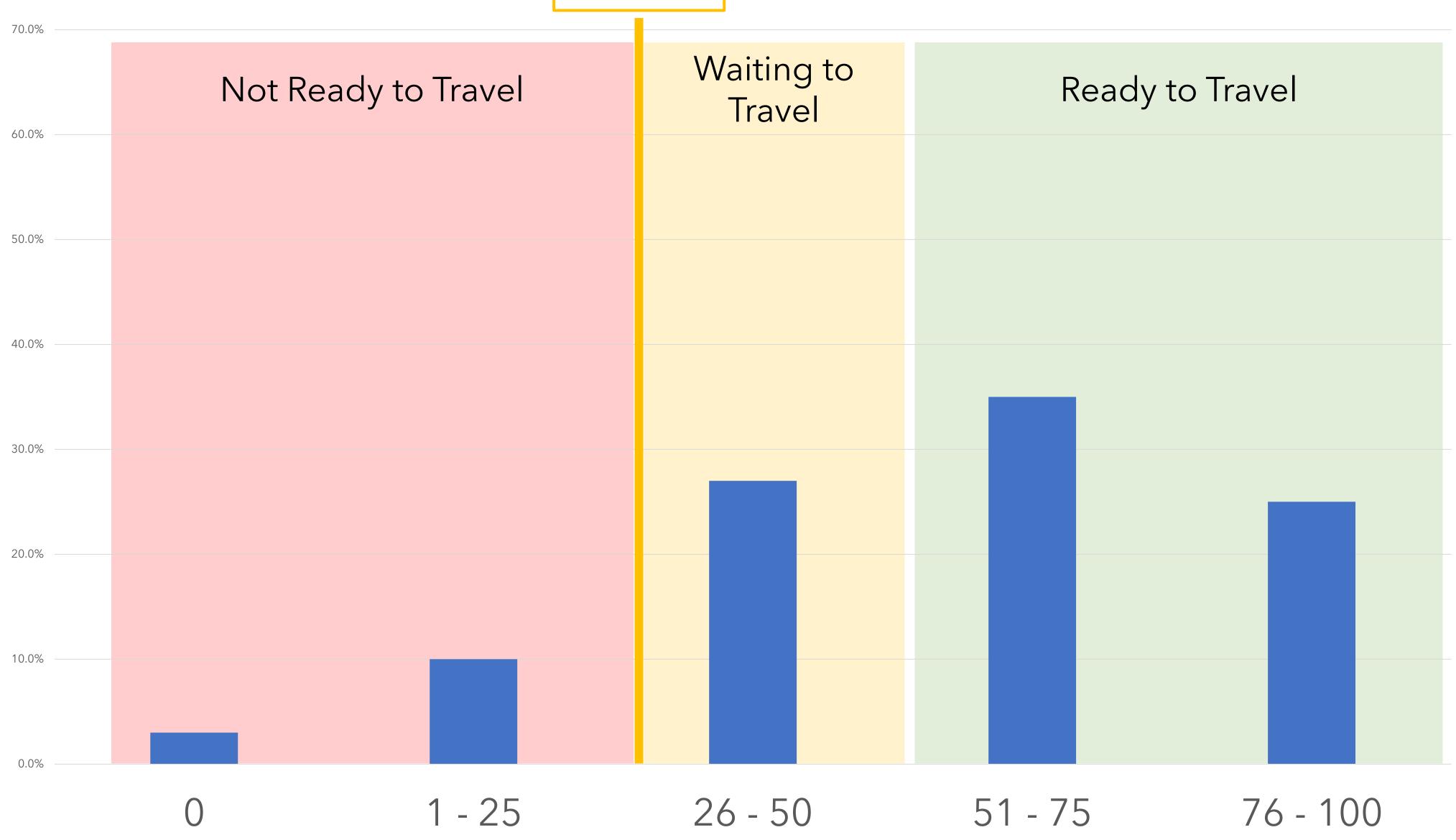


### \*Normalized to a 100pt scale



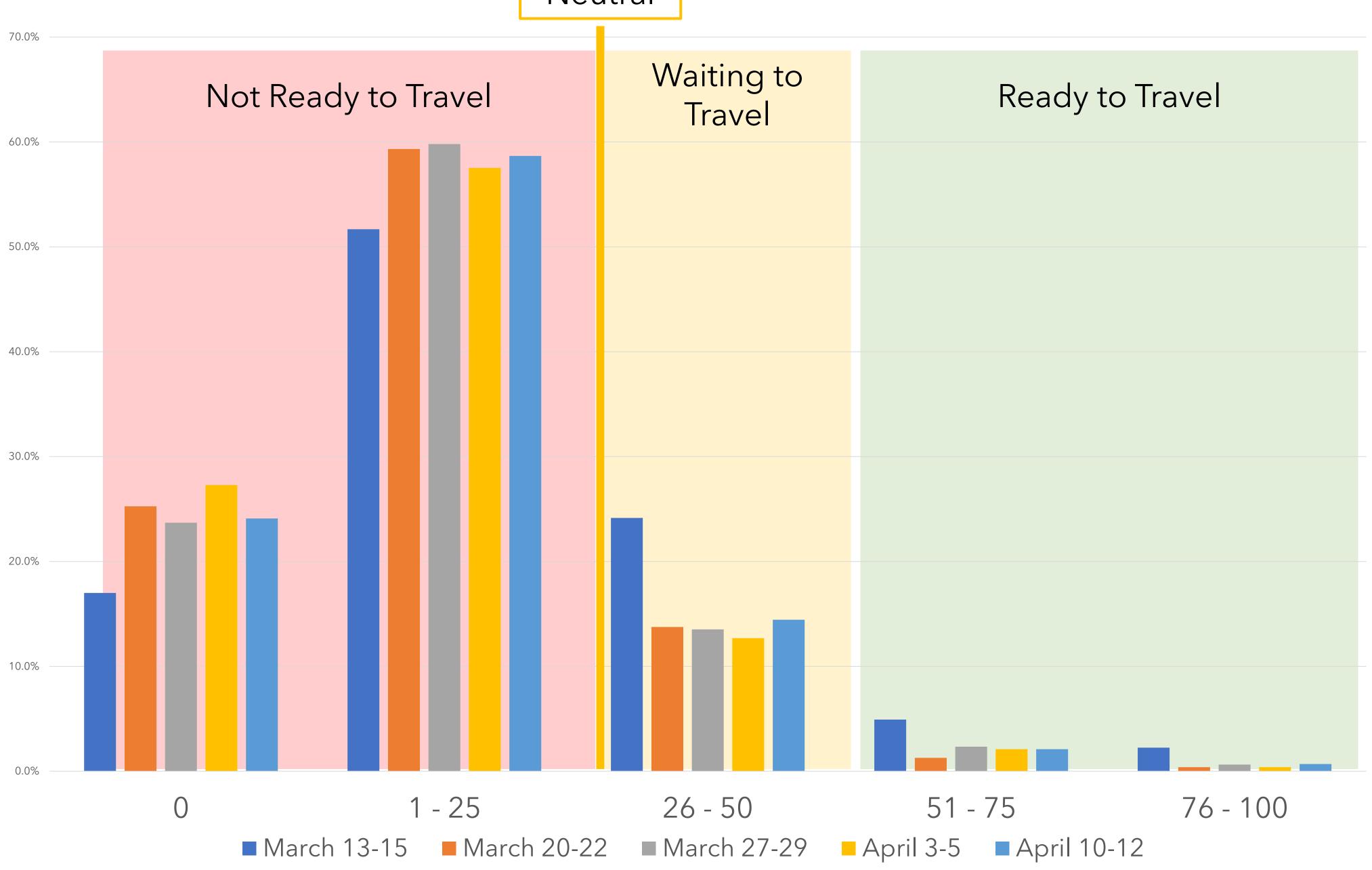


#### Neutral



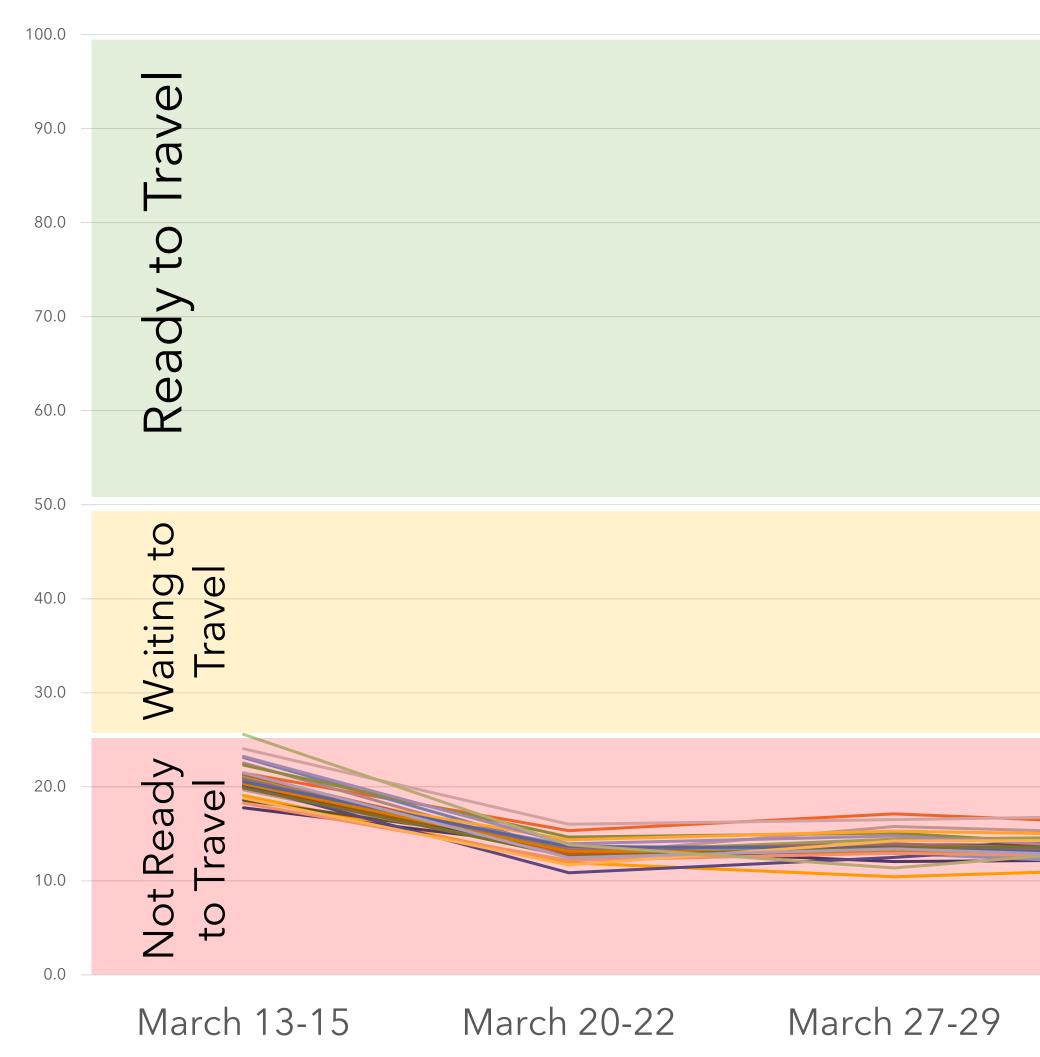
Healthy Travel Outlook

#### Neutral



## Raw Index Charted

Raw Index



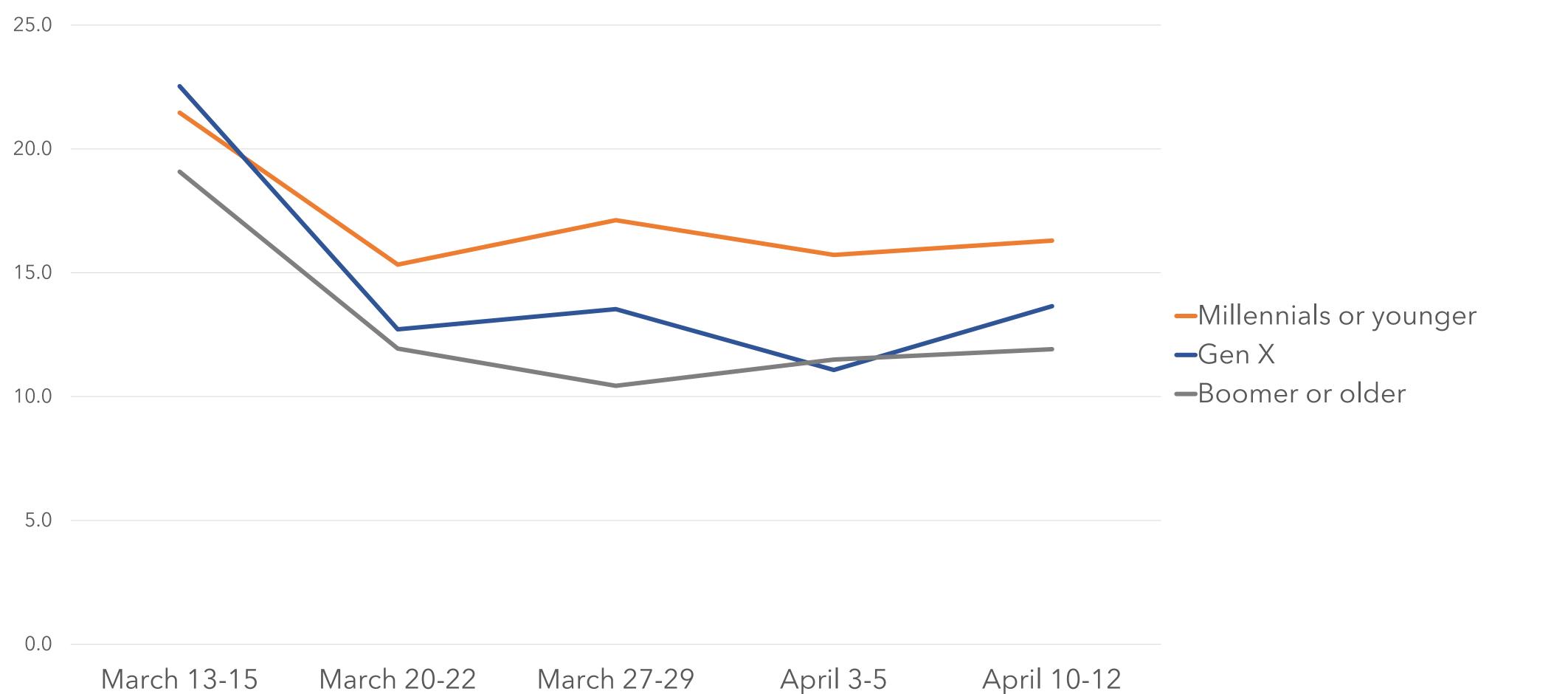


- -Millennials or younger
- —Gen X
- -Boomer or older
- -WEST
- -MIDWEST
- -NORTHEAST
- -SOUTH
- -Commercial Lodging Travelers
- -International Travelers
- -Air Travelers
- -Cruise Travelers
- -Leisure Travelers
- -VFR Travelers
- -Business Travelers
- -Convention Travelers
- -Female
- -Male
- -Affluent
- -City Travelers
- -Beach Travelers
- -US National Parks Travelers
- -Suburban area
- -Large city (urban area)
- -Rural area
- -Coronavirus Infected City
- -Non-Coronavirus Infected City
- -Luxury hotel
- -Non-luxury Hotel
- -Peer-to-peer lodging

April 3-5

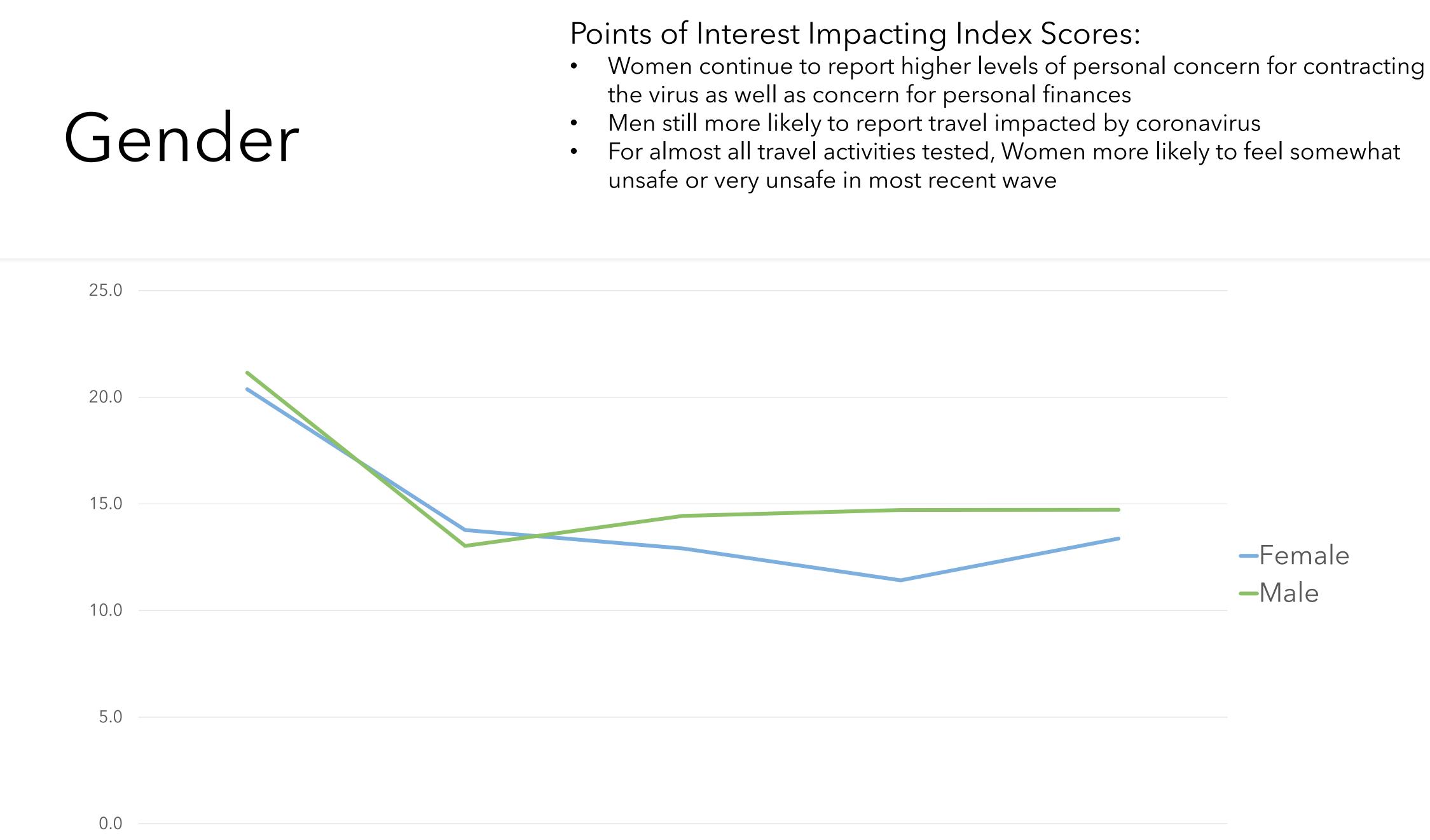
April 10-12

### • Generation $\bullet$ $\bullet$



- Points of Interest Impacting Index Scores:
  - Gen X showed the most personal concern for contracting the virus this week, Millennials the least.
    - Boomers and Gen X both show high concern for personal finances this week Millennials are more likely to have rescheduled a postponed trip
    - Millennials continue to index relatively higher on openness to messaging and excitement to travel now

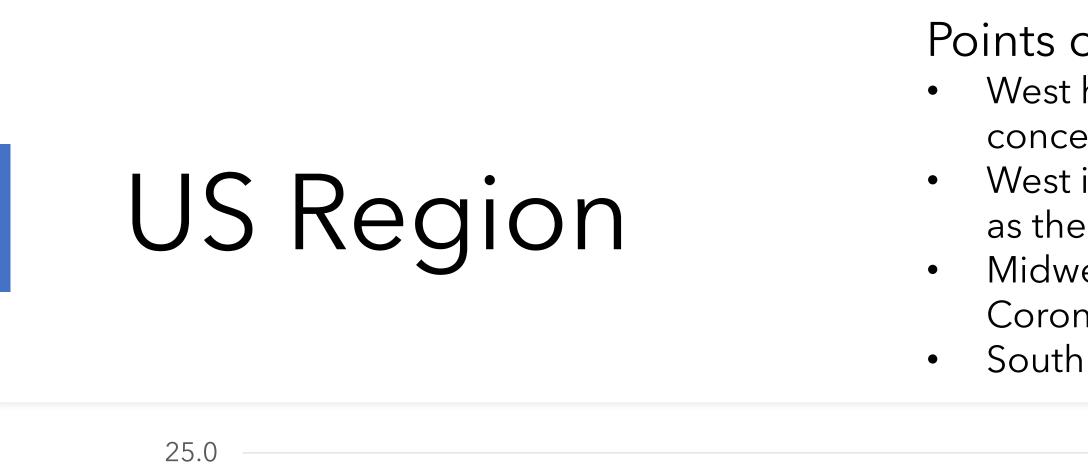


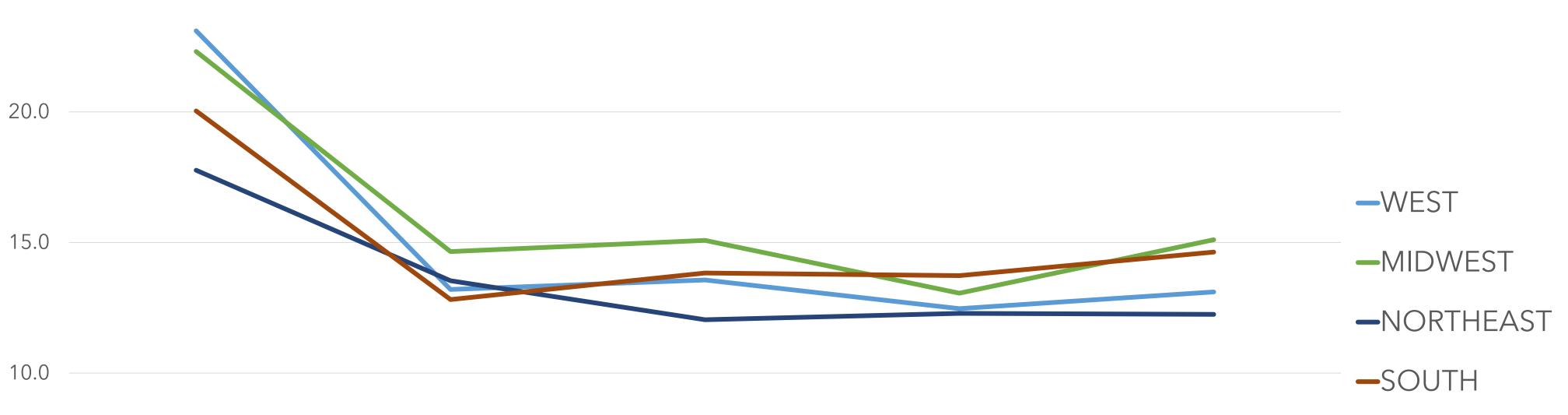


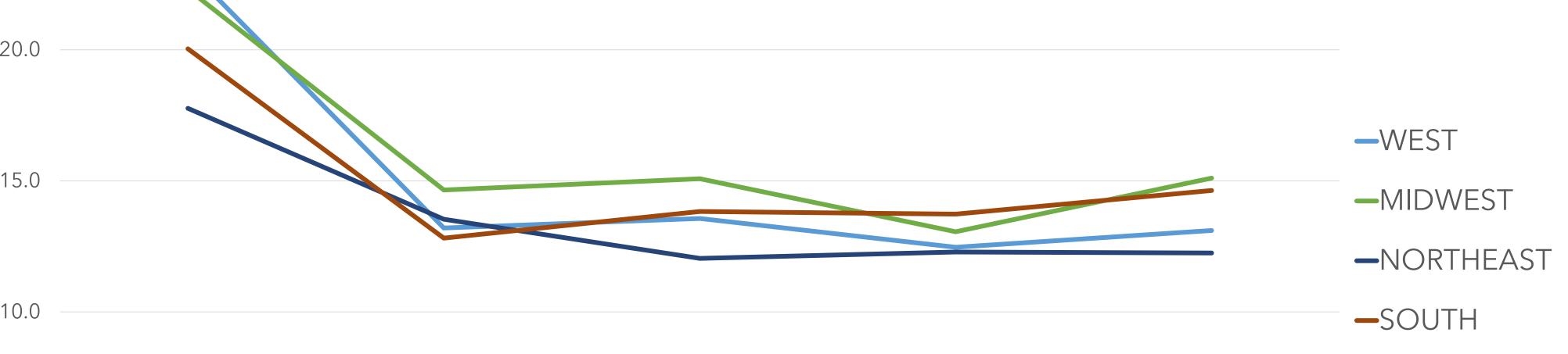
March 13-15

March 20-22









5.0

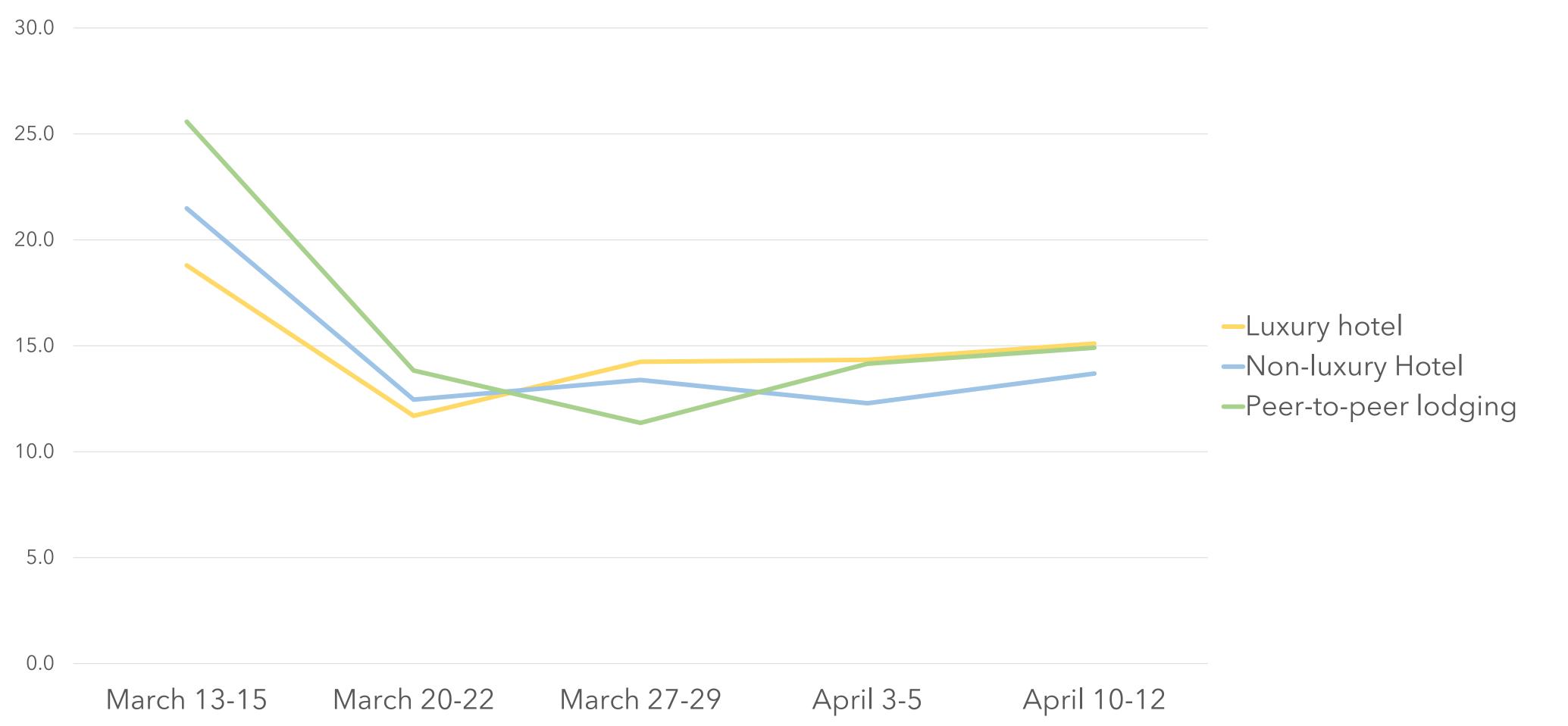
0.0 March 27-29 March 13-15 March 20-22

#### Points of Interest Impacting Index Scores:

- West has tied Northeast this week with the highest levels of personal concern for contracting the virus
- West is highest this week for both concerns about personal finances as well as the national economy
- Midwest is least optimistic this week being the most likely to say the Coronavirus situation will get worse or much worse in the next month South shows relatively most excitement to travel now this week



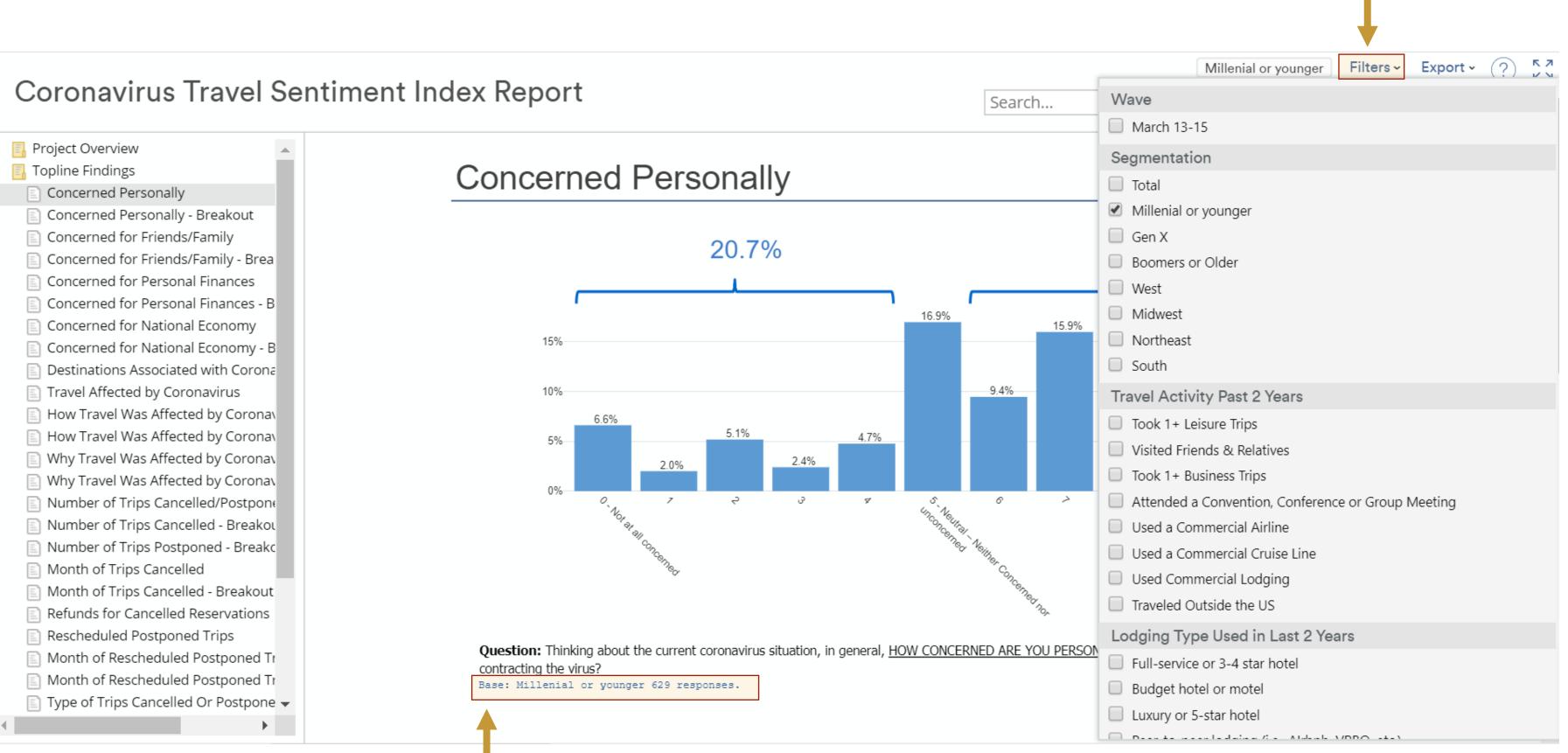
## Commercial Lodging



Points of Interest Impacting Index Scores:

- Luxury hotel guests show the relatively lowest concern for personal finances while non-luxury hotel guests show the lowest personal concern for contracting the virus
- Both luxury and non-luxury hotel guests show higher than average optimism for the coronavirus situation improving.
- Luxury hotel guests show relatively more openness to messaging and excitement to travel





#### 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

• Online Focus Group with Travelers

International Traveler Study





#### **DMO/Website IMPORTANCE STUDY** [FREE TO PARTICIPATE]

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

You may sign up to participate in this free research at: www.destinationanalysts.com/dmo-website-value-study



### THANK YOU

Questions and requests for more information: info@destinationanalysts.com Please consider purchasing, subscribing or donating to support this research https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/



