

# DESTINATION ANALYSTS' TRAVEL SENTIMENT BENCHMARKS

UNDERSTANDING THE LOSS & IMPACT OF COVID-19  
ON THE TRAVEL INDUSTRY

*updated May 26<sup>th</sup>, 2020*

Destination  Analysts

# About Destination Analysts

Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

In addition to this report, Destination Analysts conducts **The State of the American Traveler** and **The State of the International Traveler**—the travel industry's premier studies for tracking traveler sentiment and global destination brand performance—as well as **The CVB and the Future of the Meetings Industry** annual study helping destination marketing organizations transform their meetings sales and services strategies.





# Benchmarking Traveler Sentiment

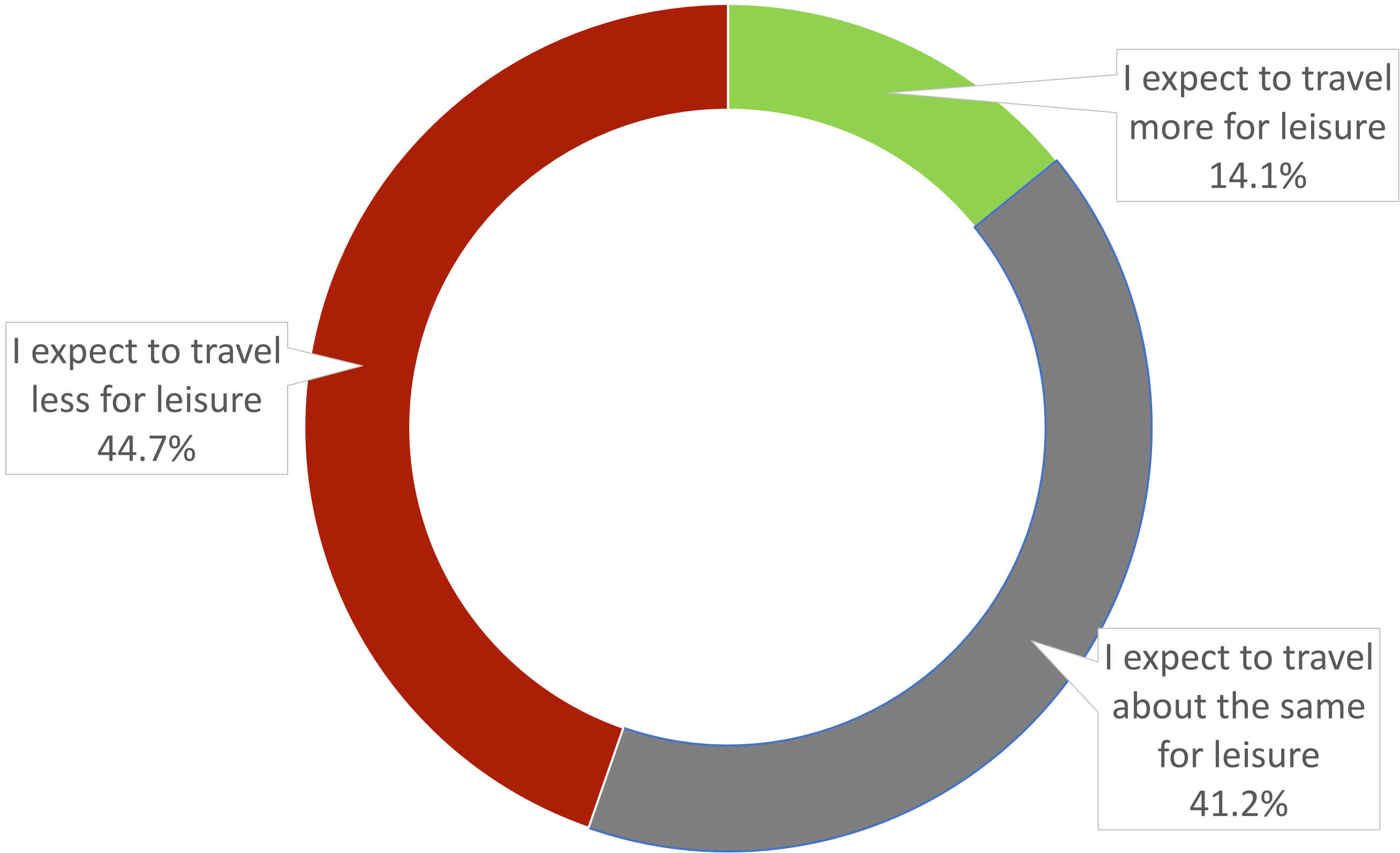
**Destination Analysts' *The State of the American Traveler Study*—begun in 2006—tracks traveler sentiment each quarter—most recently in January 2020. In this week's Coronavirus Travel Sentiment Index study, we asked several identical questions to our *The State of the American Traveler Study* in order to benchmark how travelers feel now compared to in the past. These are presented following.**

# Leisure Travel Expectations (Trips Taken)

The proportion of leisure travelers who report that they will decrease the number of trips they will take, compared to the past 12 months, has skyrocketed in the past 4 months. Now, nearly half (44.7%) say they will travel less this year. In January, this figure stood at 6.8 percent.

**Question:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)

*(Base: Wave 11. 1,223 completed surveys.  
Data collected May 22-24, 2020)*

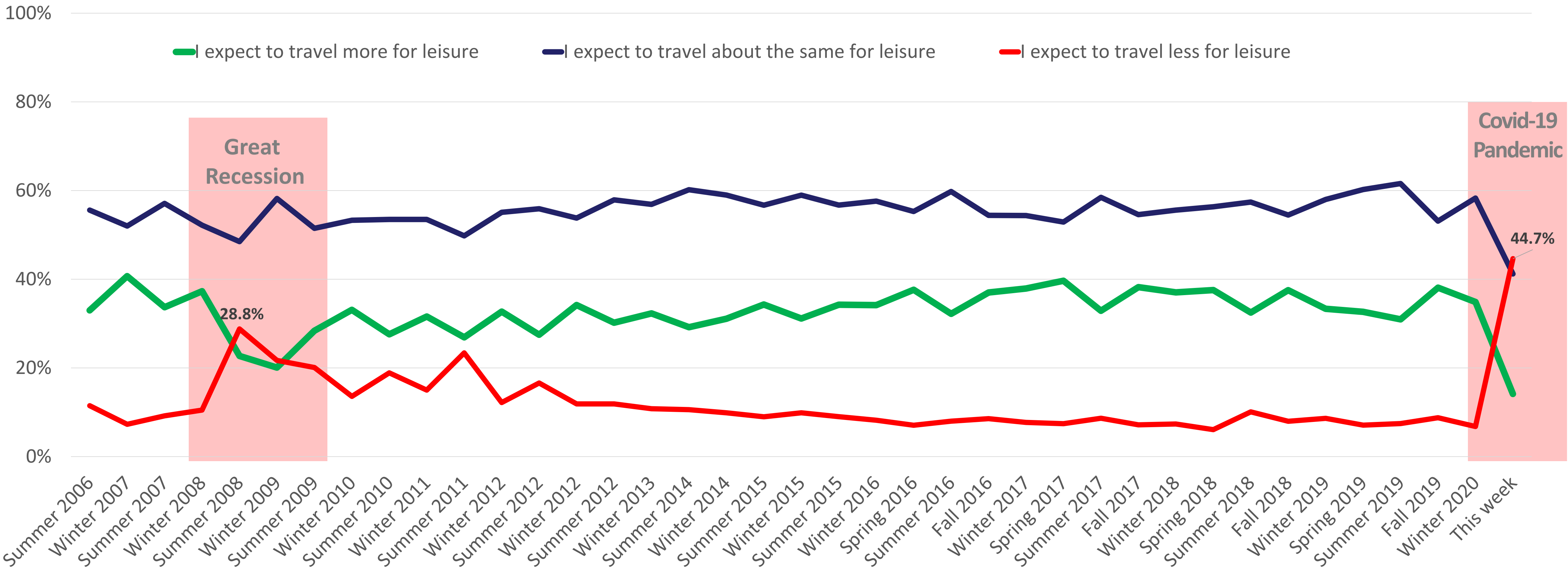




# Historical Perspective: Leisure Travel Expectations (Trips Taken)

Prior to this week, the highest recorded percentage of American travelers to say they would be taking LESS leisure trips in the coming year compared to the previous year was in July 2008, as the Great Recession loomed.

**Question:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?



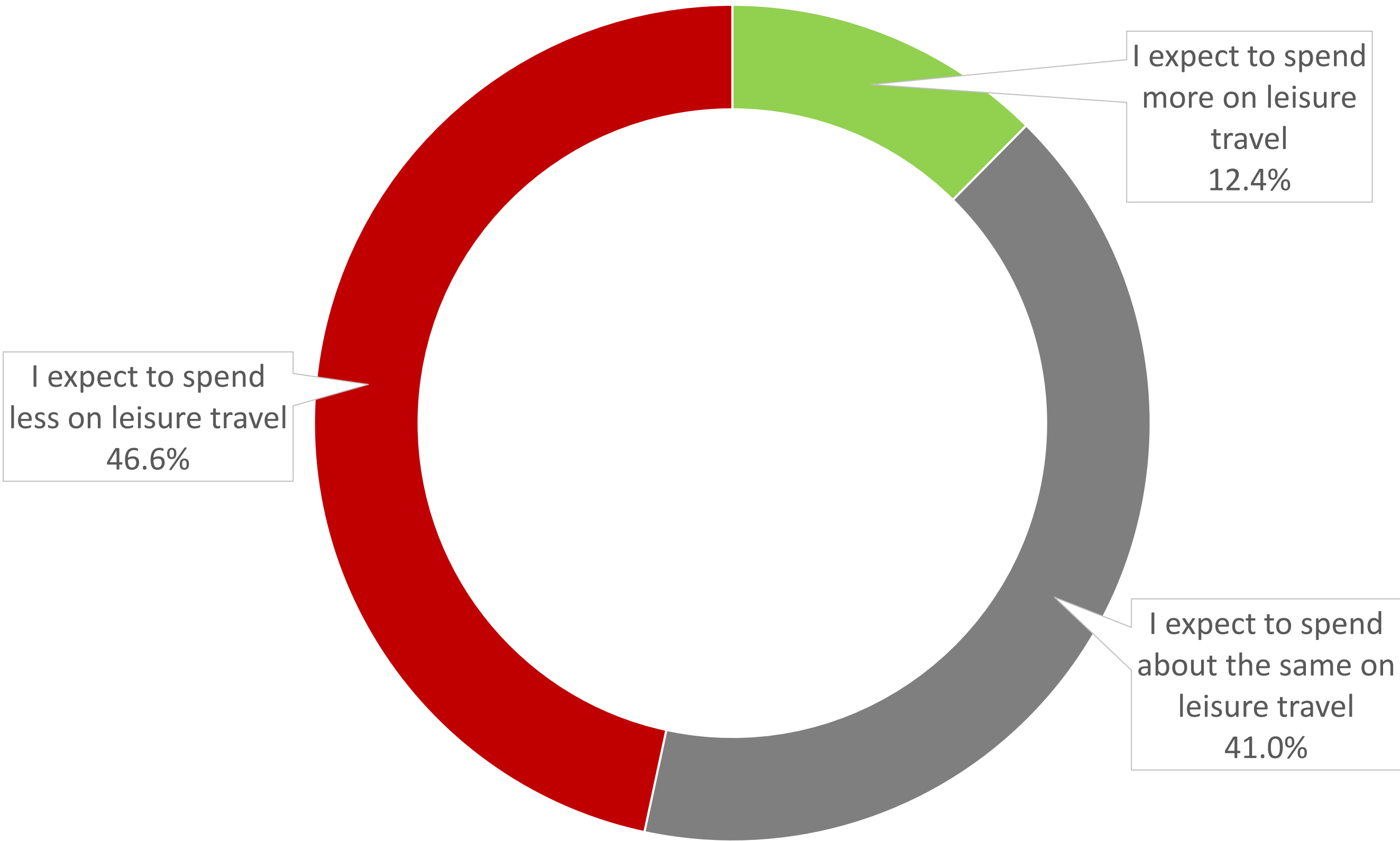
(Base: All respondents, 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

# Leisure Travel Expectations (Spending)

The percent of leisure travelers who reports that they will decrease their travel spending this year compared to the past 12 months has also grown sharply. Now, 46.6 percent say they will reduce their travel spending. In January, this figure stood at 9.4 percent.

**Question:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period? (Select one)

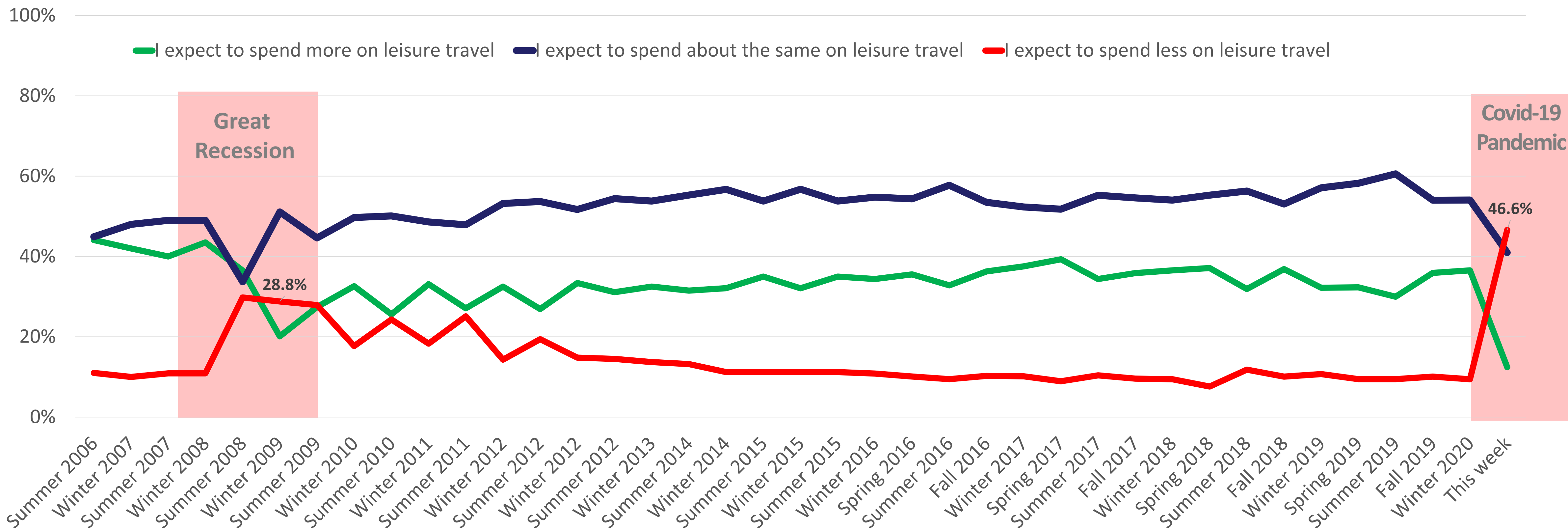
*(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020)*



# Historical Perspective: Leisure Travel Expectations (Spending)

Prior to this week, the highest recorded percentage of American travelers to say they would be spending LESS on leisure trips in the coming year compared to the previous year was 28.8 percent, during the Great Recession.

**Question:** In the next 12 months, do you expect to spend more or less for leisure than you did in the most recent 12-month period?



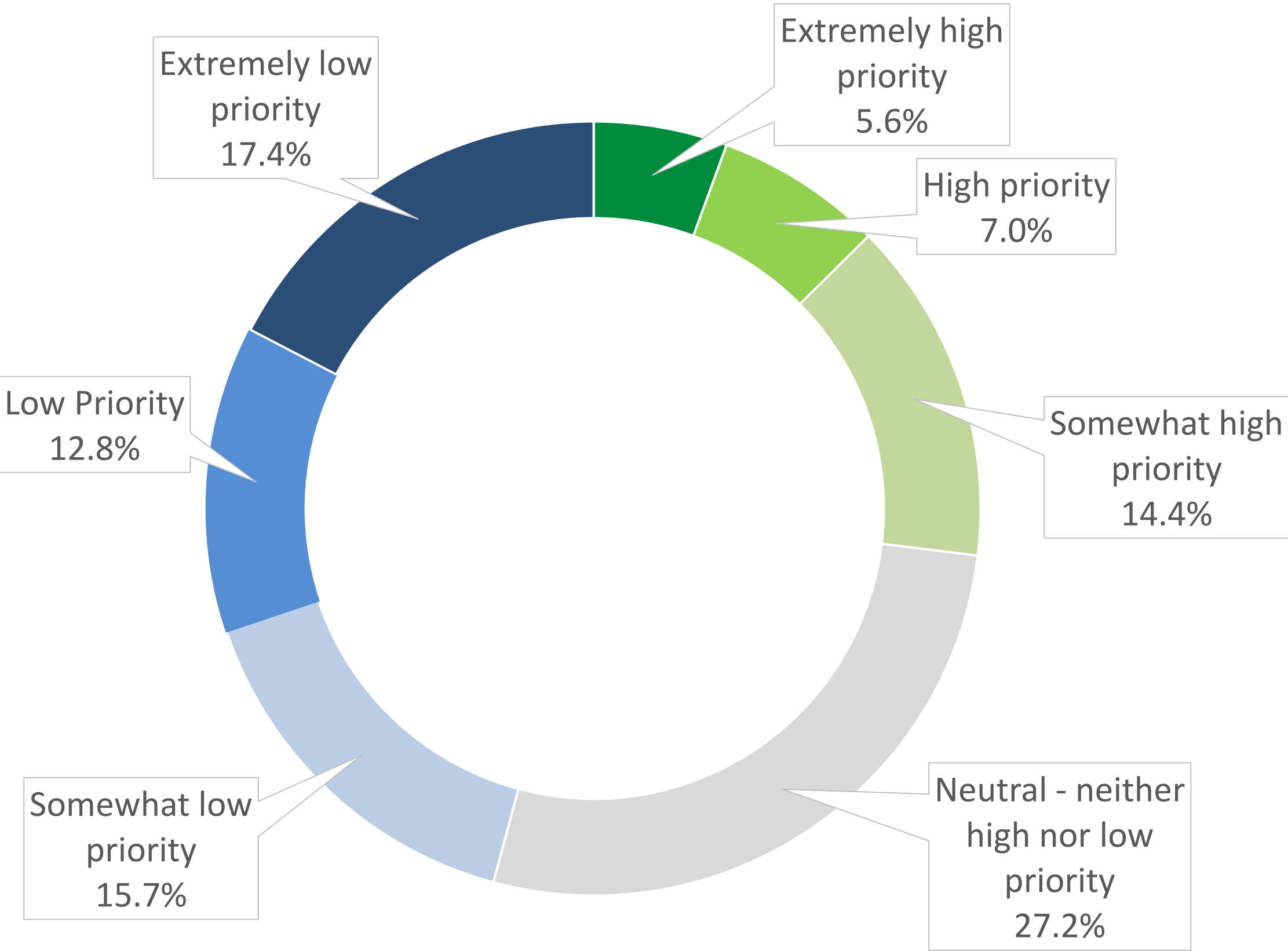
(Base: All respondents, 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

# Leisure Travel as a Budget Priority

Four months ago, 70.6 percent of travelers said that leisure travel would be at least somewhat of a budget priority in the coming year. Now, only 26.9 percent agrees. For perspective, back in January 2018, 65.3 percent said they would prioritize leisure travel in their spending (shown on the following page).

**Question:** Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

*(Base: Wave 11. 1,223 completed surveys.  
Data collected May 22-24, 2020)*

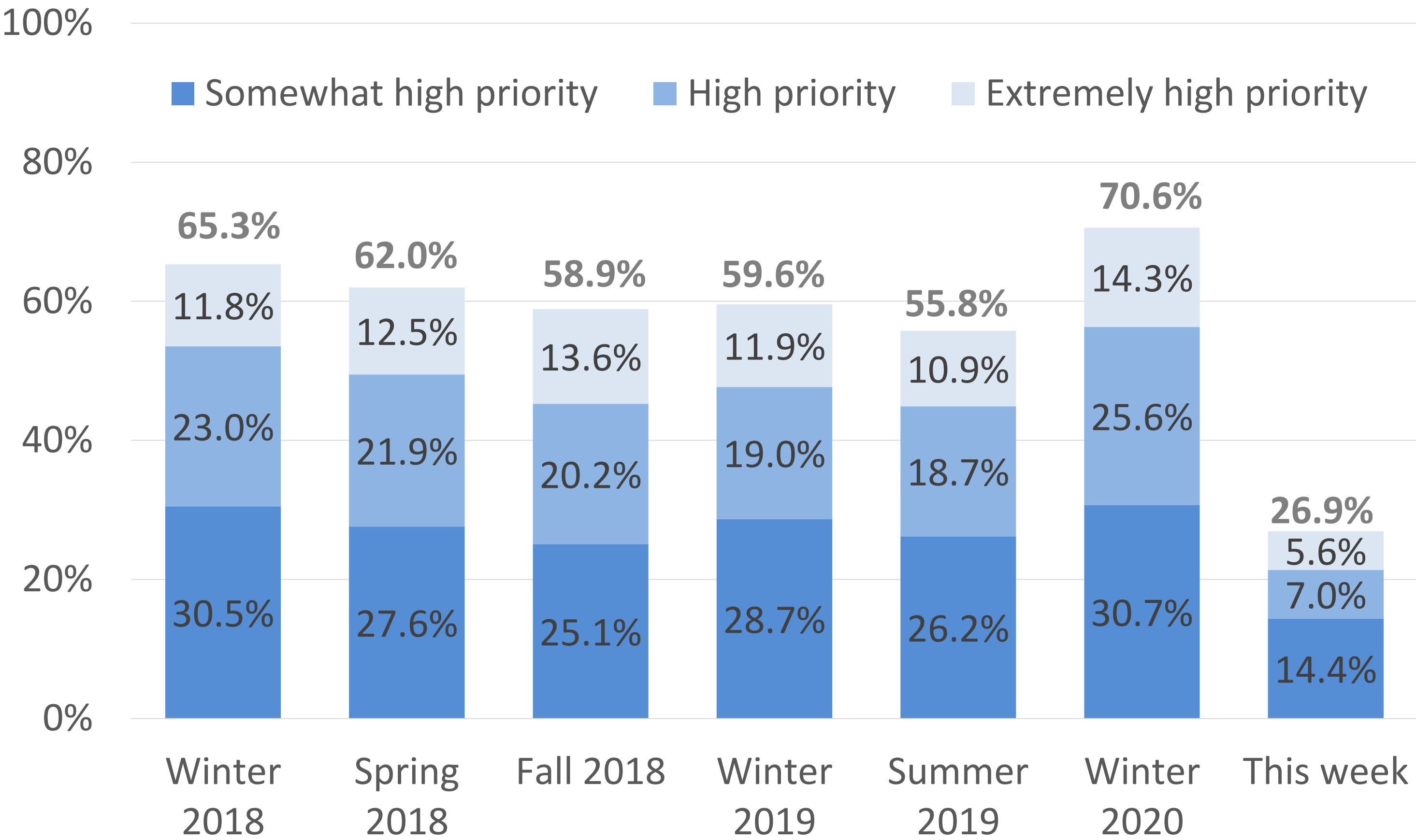




# Historical Perspective: Leisure Travel as a Budget Priority

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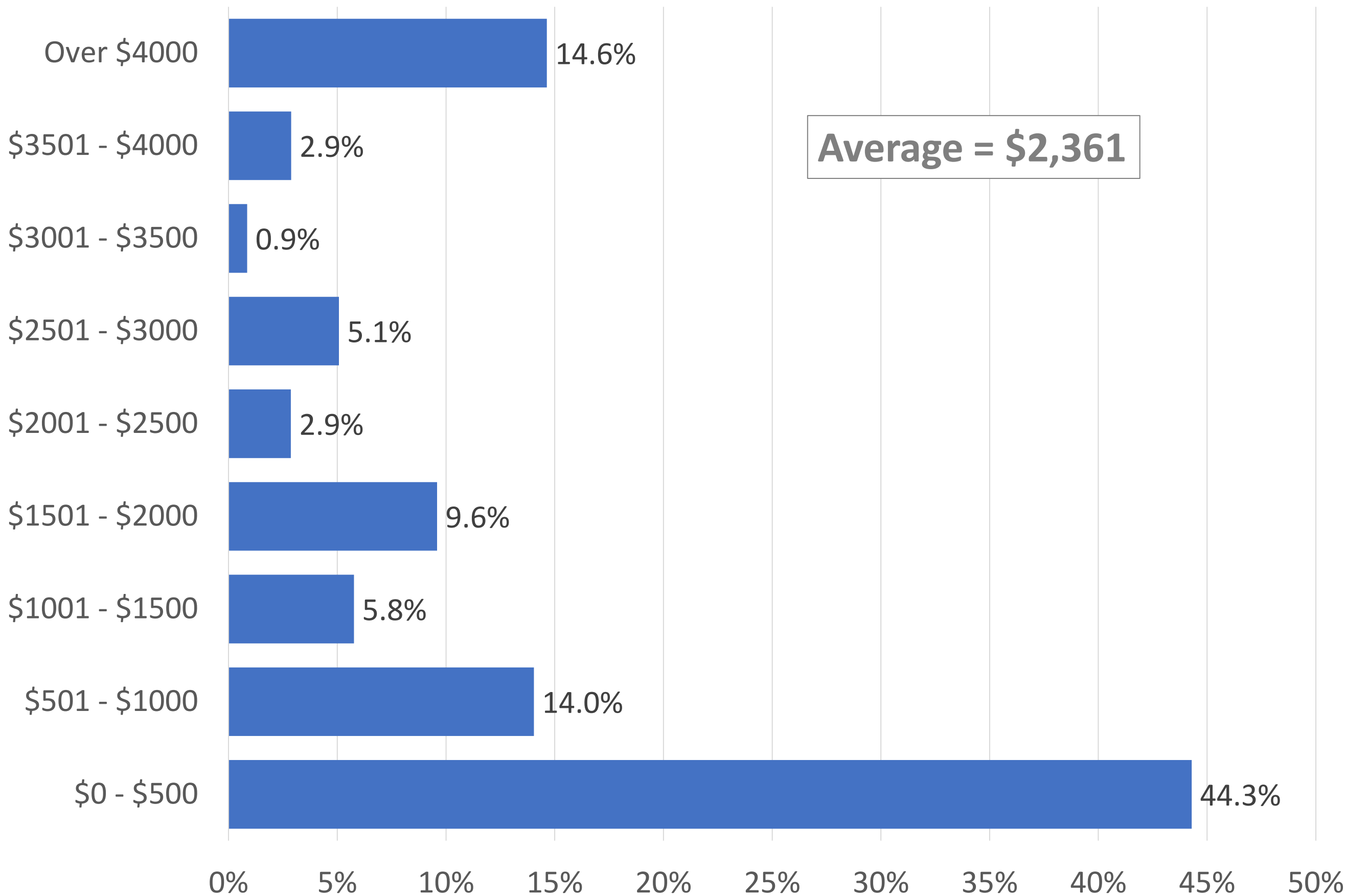


# Expected Leisure Travel Spending (Next 12 Months)

Right now, the typical American traveler expects to spend \$2,361 in the next 12 months on leisure travel, down 40 percent from January when the result was \$3,882. In total, 44.3 percent say they are going to spend less than \$500 on leisure travel this year—a 5-year high—and just 14.6 percent say they will spend more than \$4,000—a 5-year low (shown on next page).

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

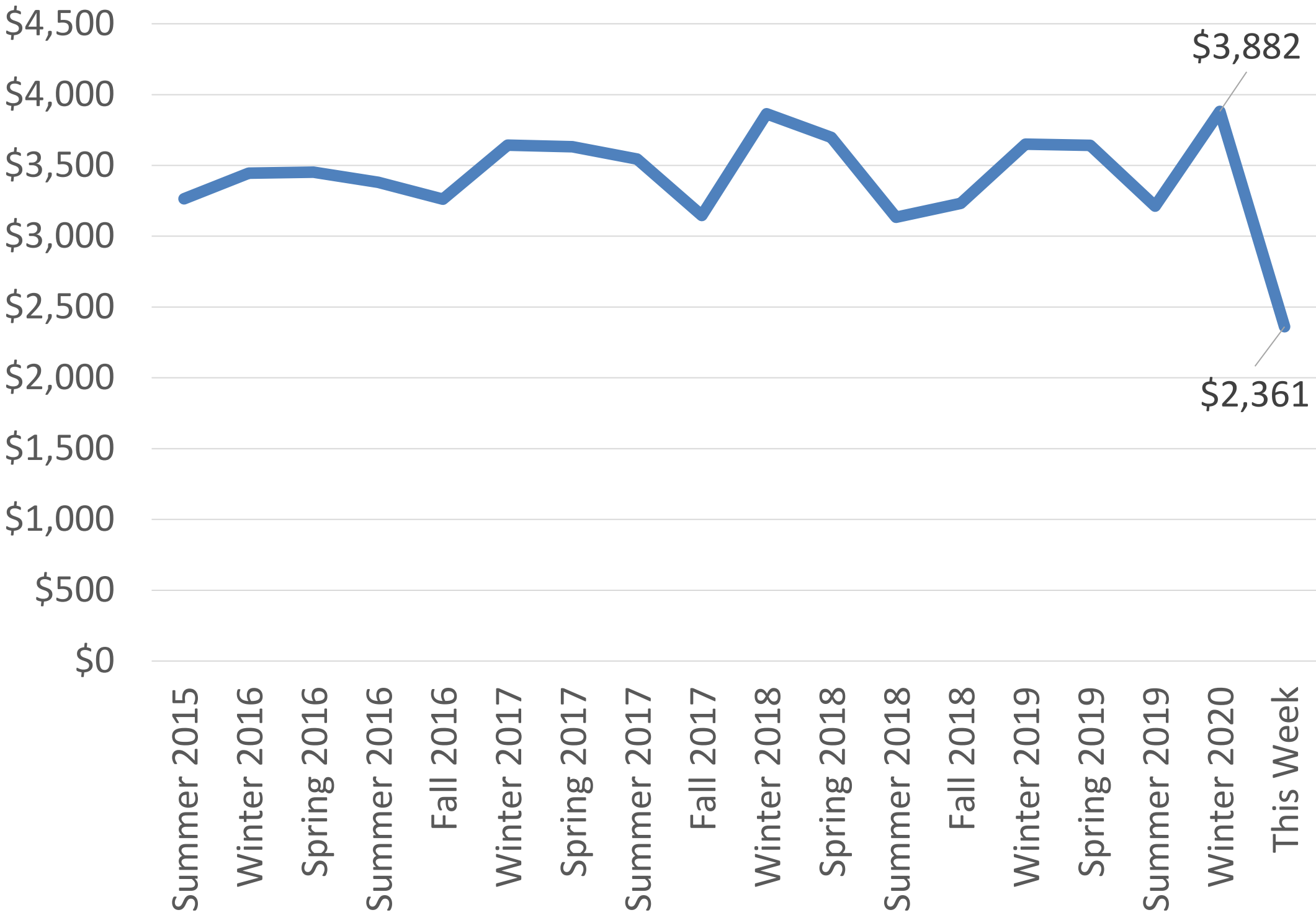
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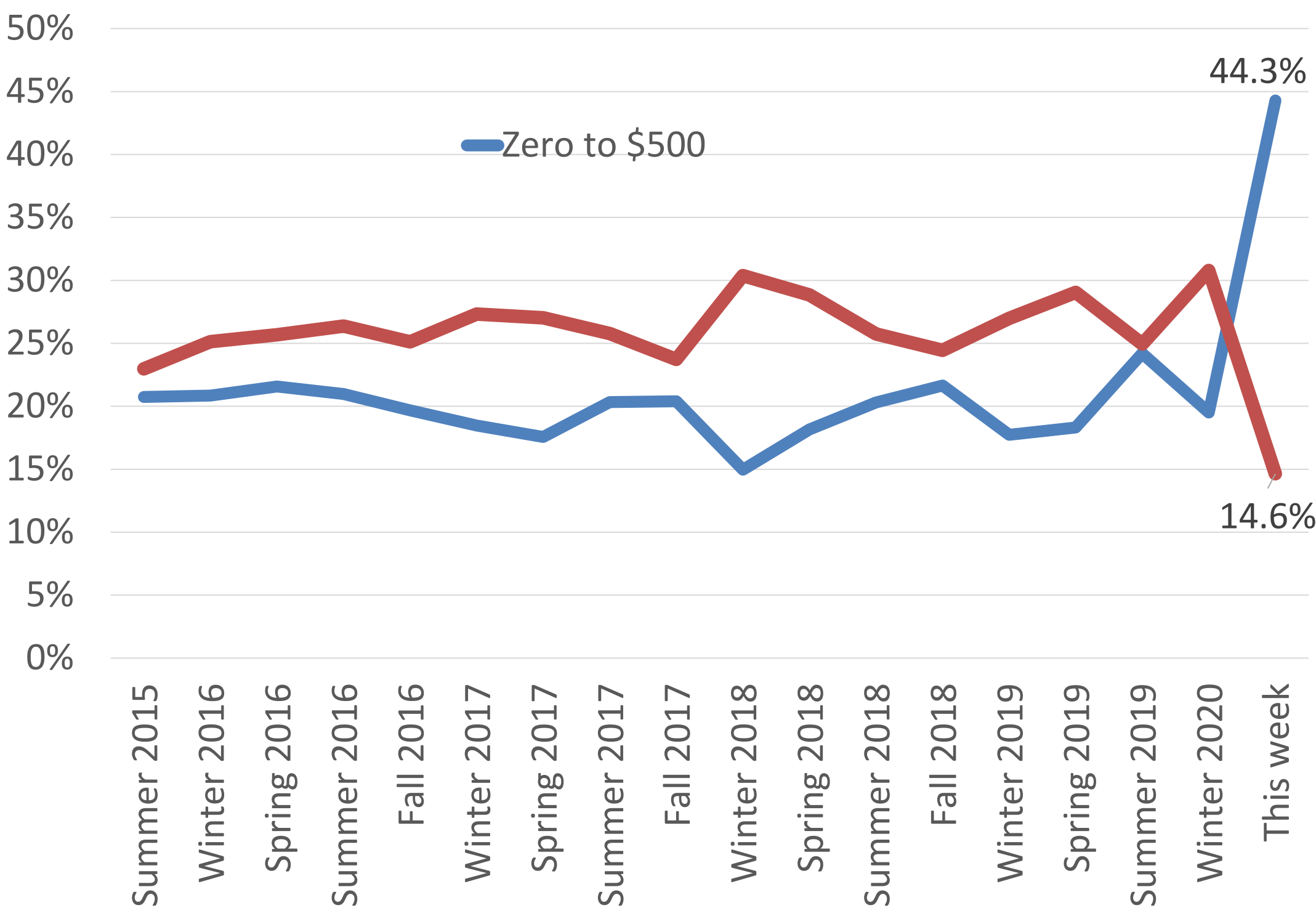
# Expected Leisure Travel Spending (Next 12 Months)

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

Average Expected Spending



% in the Highest/Lowest Spending Categories

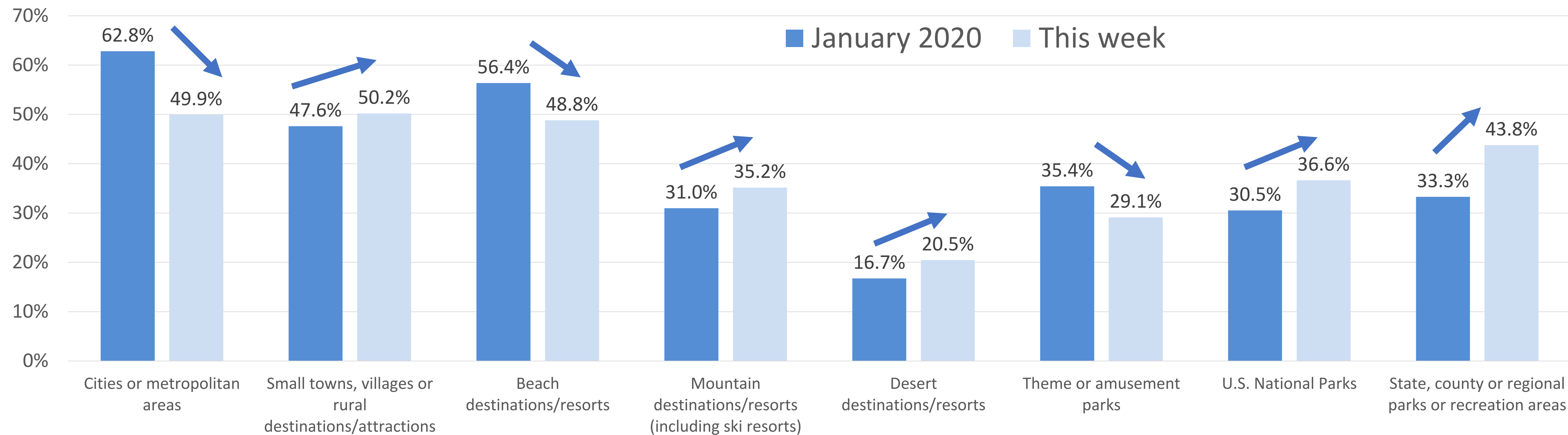




# Leisure Travel by Destination Type (Intent to Visit, Next 12 Months)

Compared to January, more American travelers are planning to visit small towns, mountain and desert destinations, and National and other parks. Fewer Americans plan to visit large cities, beach destinations and theme or amusement parks.

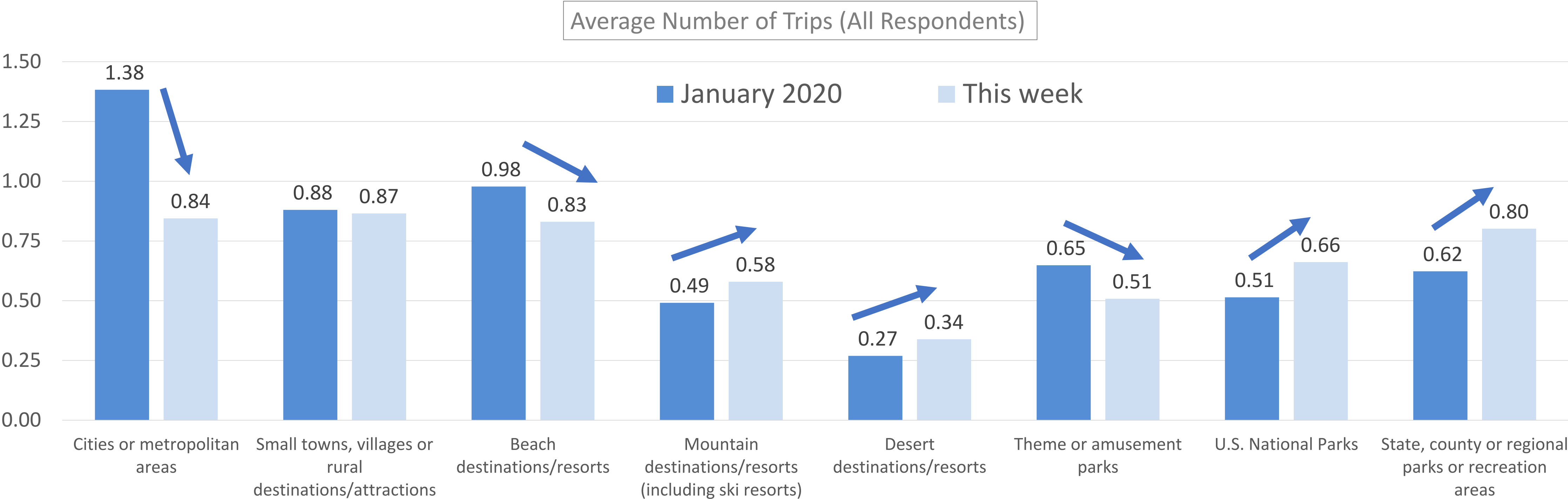
**Question:** In the next 12 months, HOW MANY TRIPS will you take that will include each of the following types of leisure destinations?



# Leisure Travel by Destination Type (Expected # of Trips in the Next 12 Months)

Not only are more travelers planning to visit National and other parks, the average number of trips they plan to take is greater, compared to only four months ago. The number of trips Americans expect to take to cities, beaches and theme/amusement parks has fallen.

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

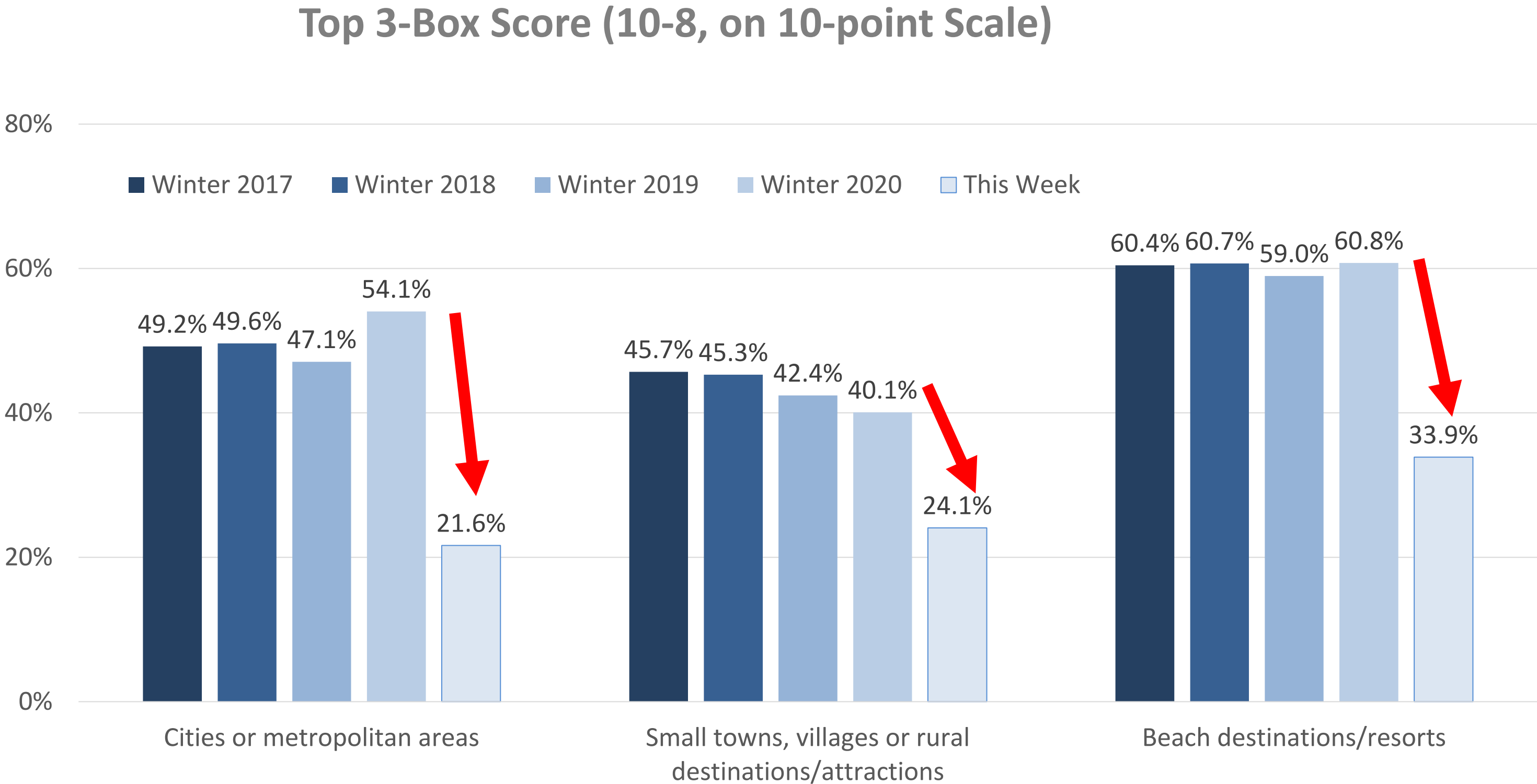


# Excitement for Each Destination Type (Top 3-Box Score)

Despite the travel patterns described earlier, when asked how excited they were to visit all destination types, excitement levels are much lower than they were in January.

**Question:** Thinking carefully about the destinations you are MOST EXCITED TO VISIT IN THE NEXT TWELVE (12) MONTHS for leisure reasons.

Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year.



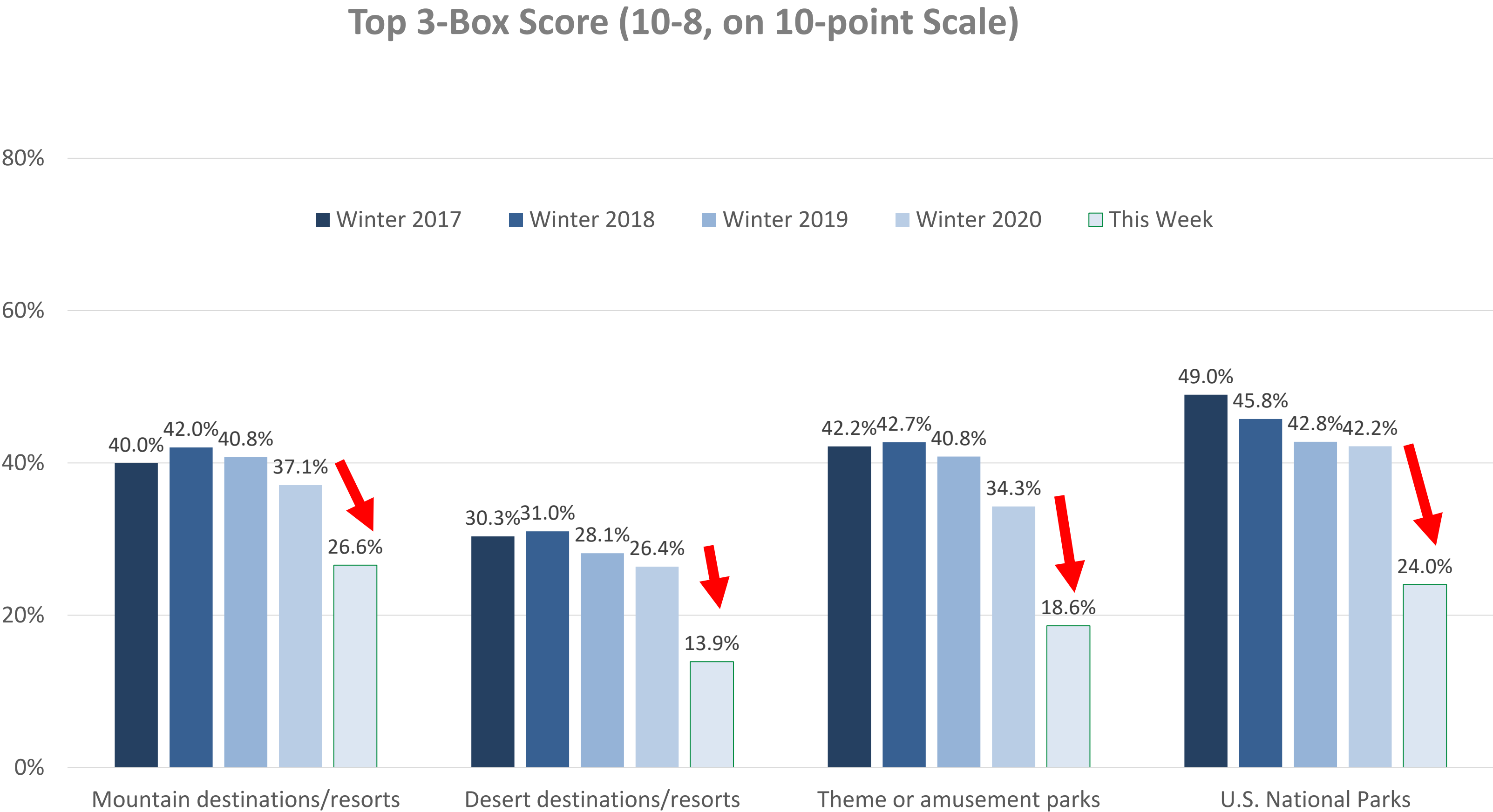
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# Excitement for Each Destination Type (Top 3-Box Score)

**Question:** Thinking carefully about the destinations you are **MOST EXCITED TO VISIT IN THE NEXT TWELVE (12) MONTHS** for leisure reasons.

Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year.



# General Interest in Travel Experiences (Top 2-Box Score)

**Interest in all types of travel experiences is greatly muted at the moment.** In January and this past week, American travelers were asked about their general interests in various travel experiences. Sadly, all travel experiences are of less interest now than four months ago.

**Question:** In general how interested are you in taking LEISURE TRIPS which would include the following.

Top 2-Box Score (Interested or Very interested)	January 2020	This Week	% CHNG
Visit State, local or regional parks	48.7%	45.2%	-7.2%
Outdoor activities (winter)	25.1%	23.1%	-8.1%
Take Road Trips	57.4%	50.5%	-12.1%
Small towns, villages or rural destinations/attractions	47.4%	40.6%	-14.4%
Visits to mountain destinations/resorts (including ski reso	40.6%	34.1%	-16.0%
Visit U.S. National Parks	57.0%	46.7%	-18.1%
Cuisine and food experiences	58.3%	47.4%	-18.6%
Enjoying scenic beauty	76.1%	61.7%	-19.0%
Theme or amusement parks	38.3%	30.1%	-21.5%
Outdoor activities (warm weather)	68.7%	53.4%	-22.3%
Visits to beach destinations or resorts	66.2%	51.0%	-23.0%
Attend Festivals and Special Events	43.4%	33.2%	-23.5%
Visiting historical attractions	62.2%	46.5%	-25.2%
Arts & culture	47.8%	31.7%	-33.7%
Visits to desert destinations or resorts	36.8%	23.8%	-35.3%
Big city experiences	53.8%	34.3%	-36.3%
Visits to foreign countries	58.0%	30.4%	-47.6%

# Drivers of Destination Aspiration

The coronavirus pandemic appears to be draining much of the joy out of travel aspiration. Survey respondents were asked to name the destination they most wanted to visit in the next year (one that they reasonably expected to visit), and then asked to select from a list of reasons which represented why they aspired to visit that particular destination. Only two reasons saw increases—beaches/water sports and friends or family in the destination. American travelers are now less likely to say any other reasons were driving their travel aspirations.

**Question:** On the last page you said you would like to visit <<DESTINATION NAME>> in the next year.

Which of the following are reasons you want to visit <<DESTINATION NAME>> this year?

(Base: Wave 11. 1,223 completed surveys. Data collected May 22-24, 2020) Source for historical data, The State of the American Traveler, Destination Analysts, Inc.

	January 2020	This Week	% CHNG
Beaches or water sports	19.5%	22.7%	16.4%
Friends or family are there	28.0%	30.4%	8.5%
Connecting with nature	20.4%	18.2%	-10.6%
Shopping	15.8%	13.7%	-12.8%
Music scene	8.8%	7.3%	-16.8%
Theme or amusement park	12.9%	9.7%	-25.1%
Adventure	22.0%	16.0%	-27.2%
It's mysterious or exotic	7.8%	5.5%	-29.2%
Special event, sporting event or festival	12.8%	8.8%	-31.2%
Winter fun (skiing, snowboarding etc.)	4.9%	3.3%	-31.8%
Bucket list destination	14.7%	9.7%	-34.2%
History	19.4%	12.7%	-34.3%
Visited before and want to return	40.1%	25.7%	-35.8%
Food & cuisine	32.3%	20.5%	-36.4%
Arts & culture	17.3%	10.3%	-40.6%
Nightlife	15.5%	9.2%	-41.0%
General atmosphere	36.6%	21.4%	-41.4%
Word of mouth	8.9%	4.9%	-44.9%
Romance	12.2%	6.7%	-45.0%

← Only two reasons increased between January to this week.





Questions?  
Need More  
Information?

- We're here for you. Please email us at [info@destinationanalysts.com](mailto:info@destinationanalysts.com).
- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>



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