



Coronavirus Travel Sentiment Index

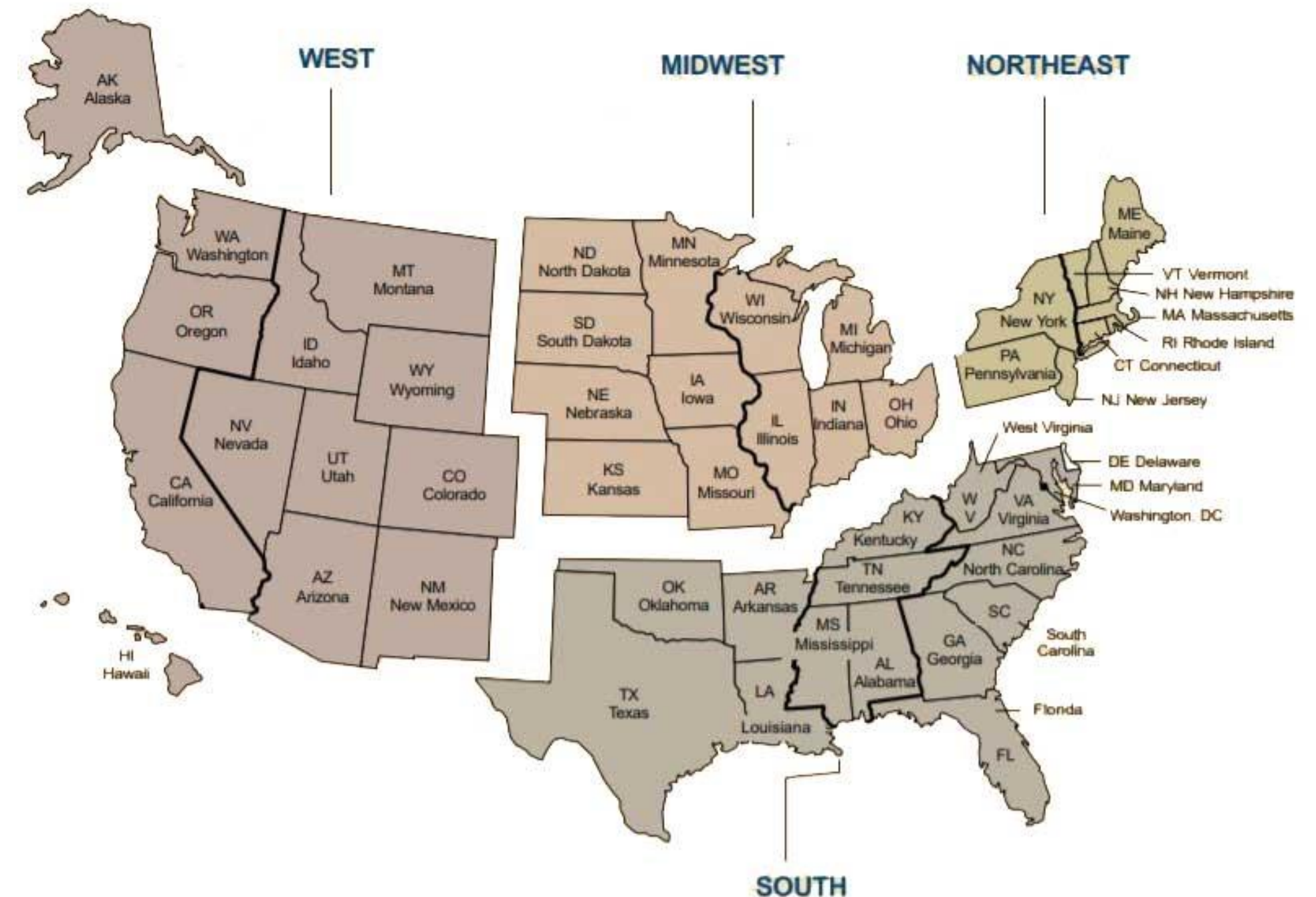
Presentation of Findings—Week of April 13th

Destination  Analysts

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 9th-11th) 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



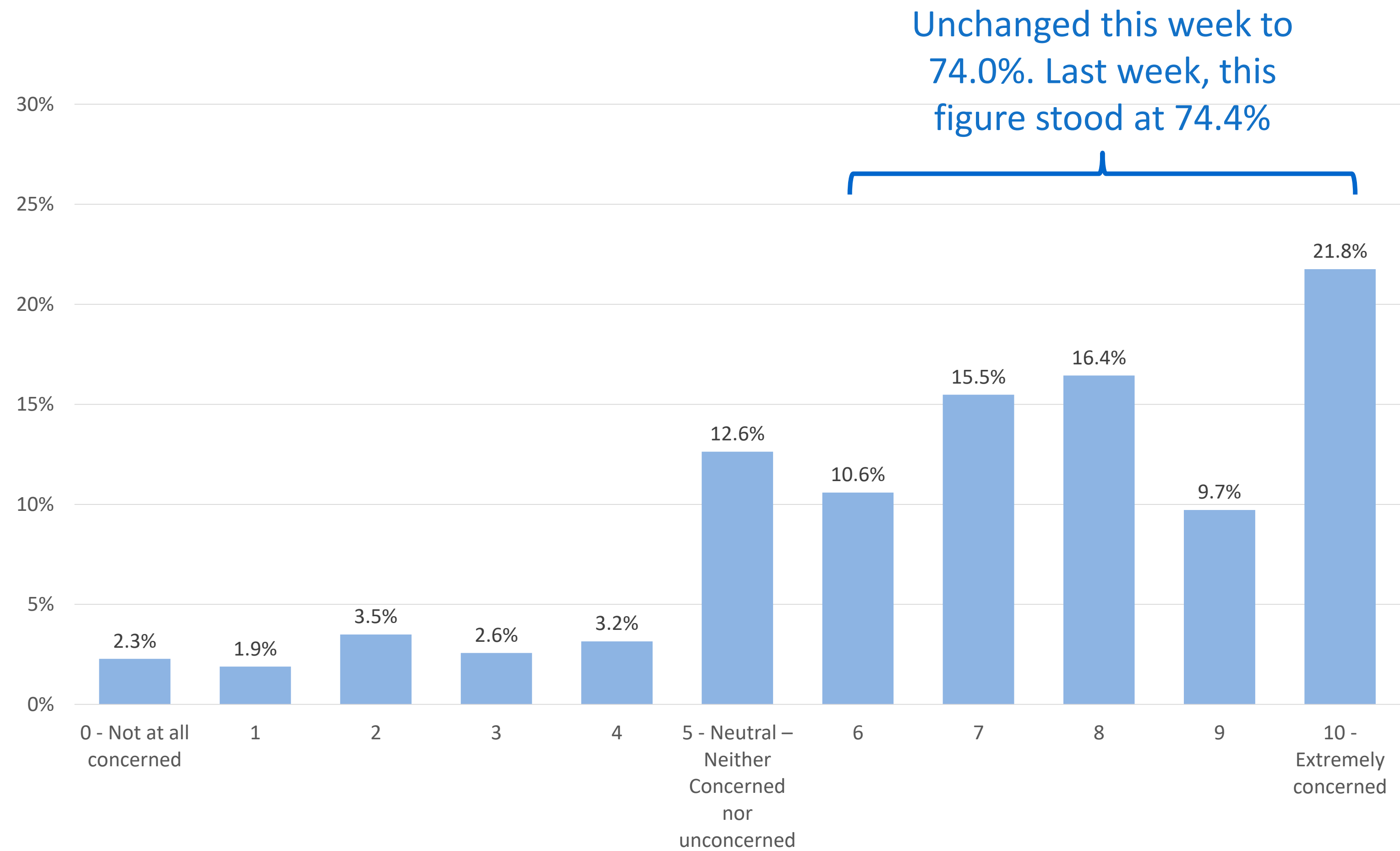
A woman and two children are walking through a brightly lit shopping mall. The woman, on the right, is wearing a blue sleeveless top and a white skirt with a colorful scalloped pattern. She is holding the hand of a young child with curly hair who is wearing a blue and white striped shirt and white shorts. To the left of the child is a young girl with long brown hair, wearing a blue short-sleeved top and a white skirt. All three individuals are wearing face masks. The woman is also carrying a large beige shoulder bag. The background shows the interior of a mall with various shops and festive decorations, including red and white striped banners. The text "Personal Concerns" is overlaid in the center of the image.

Personal Concerns

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)

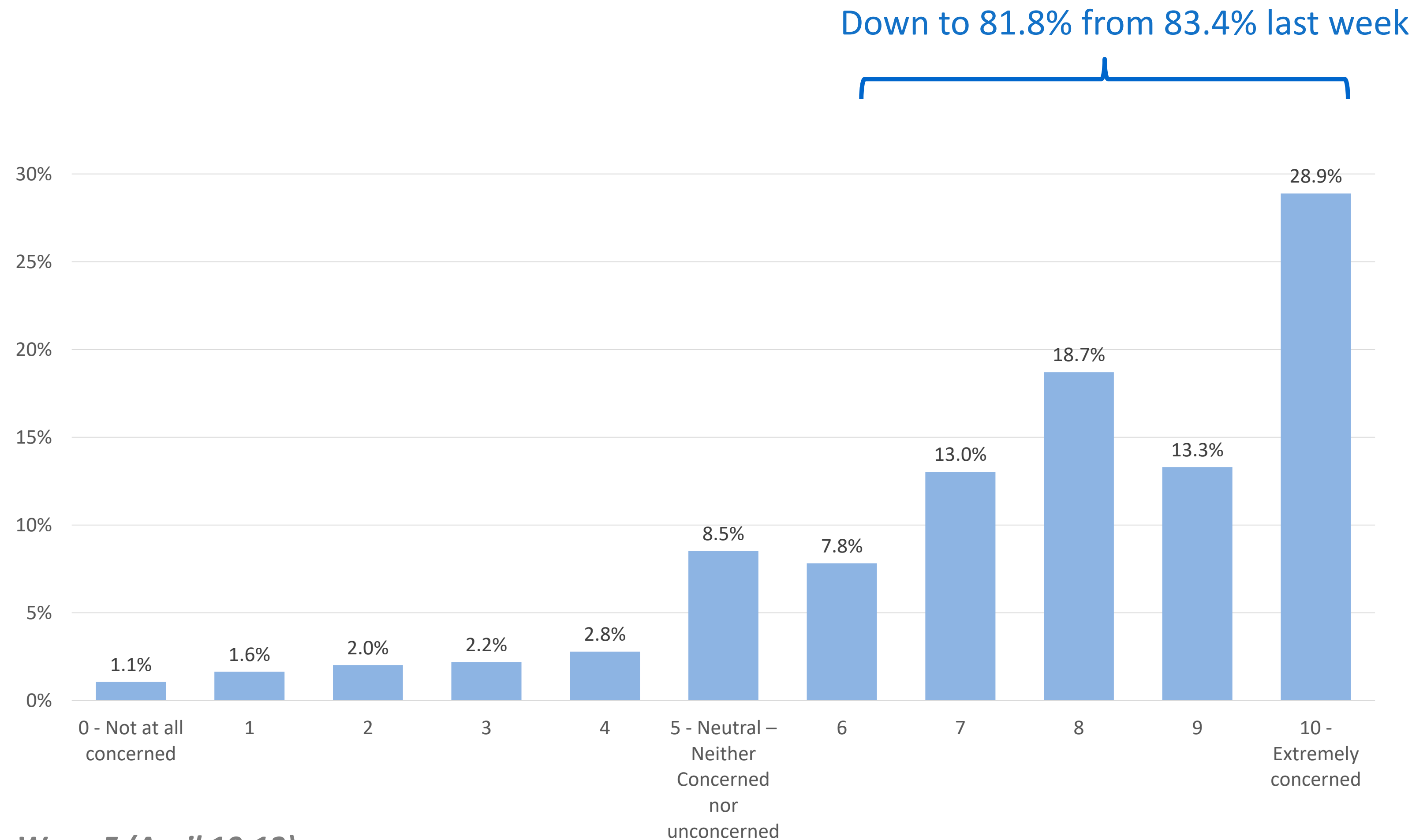


Wave 5 (April 10-12)

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)

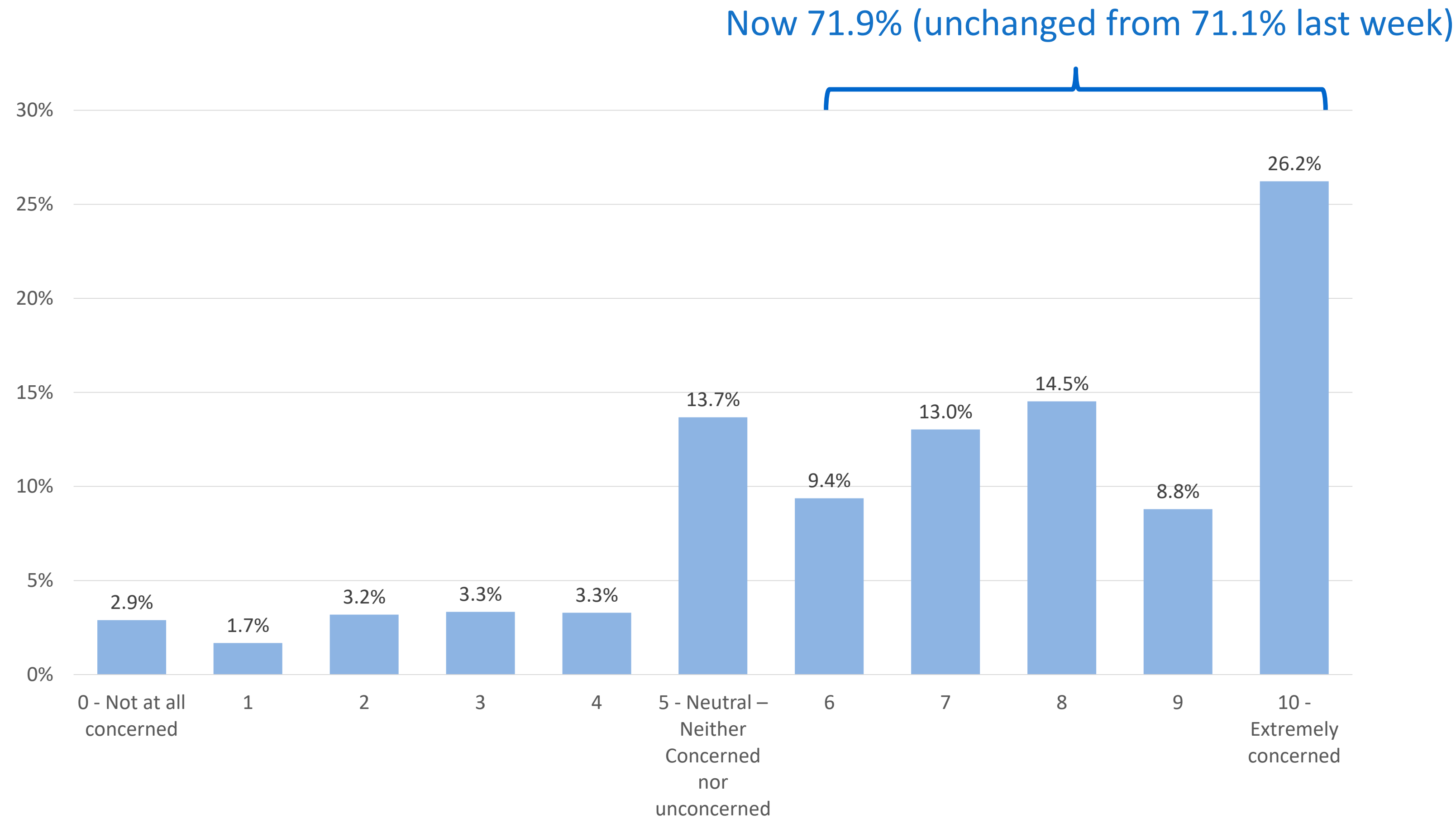


Wave 5 (April 10-12)

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)

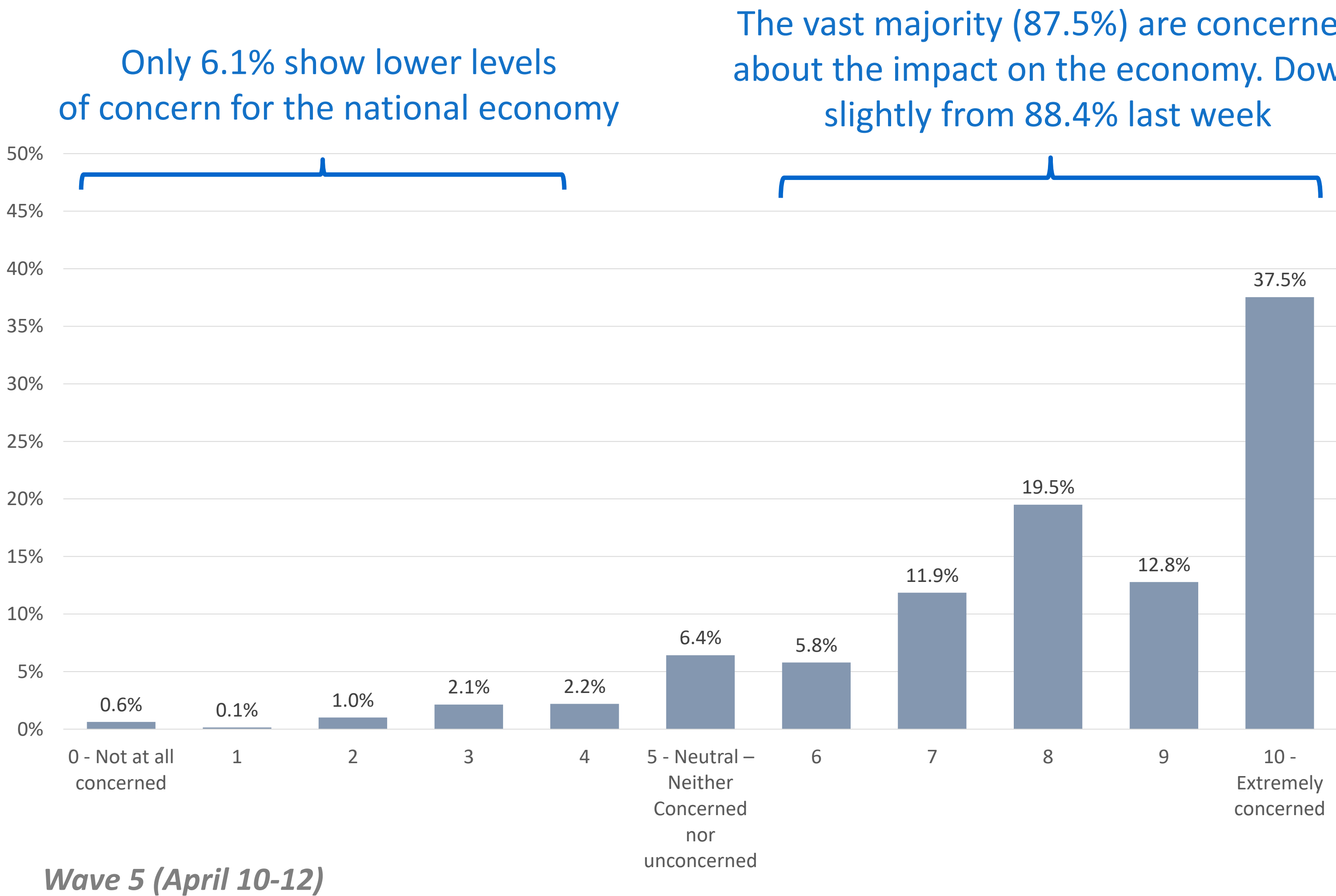


Wave 5 (April 10-12)

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?

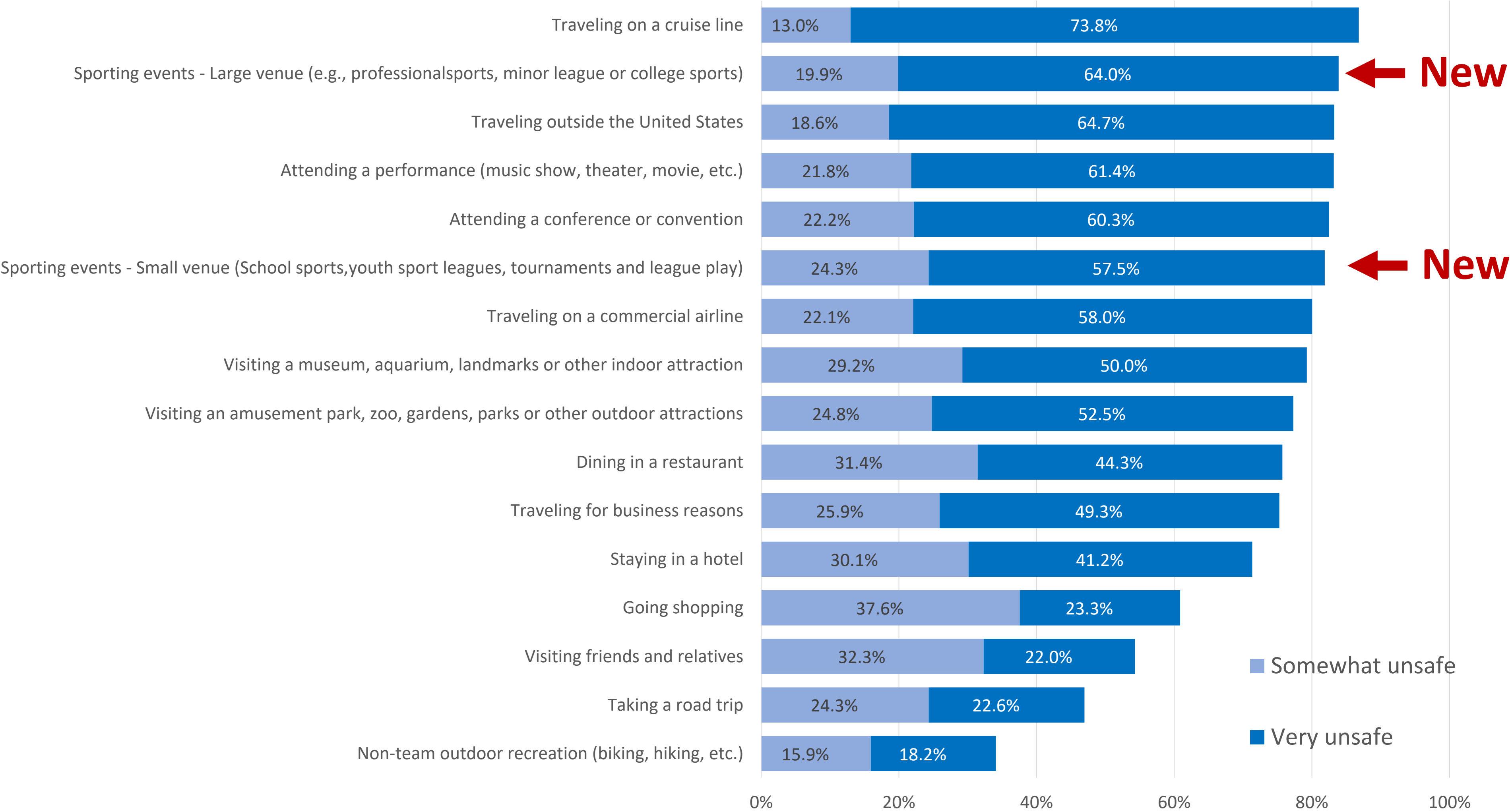
(Base: Wave 5 data. All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



Perceived Safety of Travel Activities (Wave 5)

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

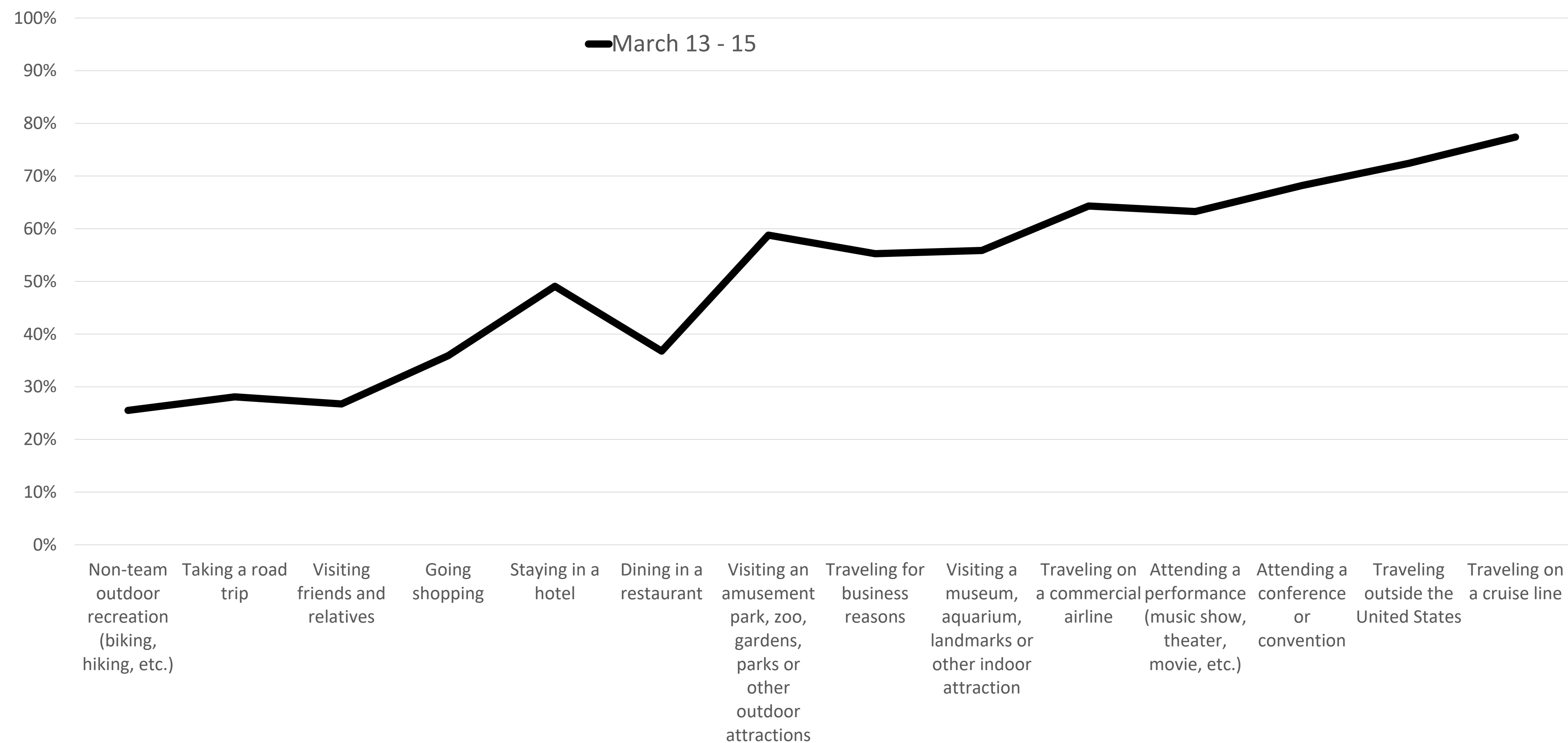
(Base: All respondents, 1,263 completed surveys. Data collected April 10-12, 2020)



Perceived Safety of Travel Activities (Waves 1-5 Comparison)

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

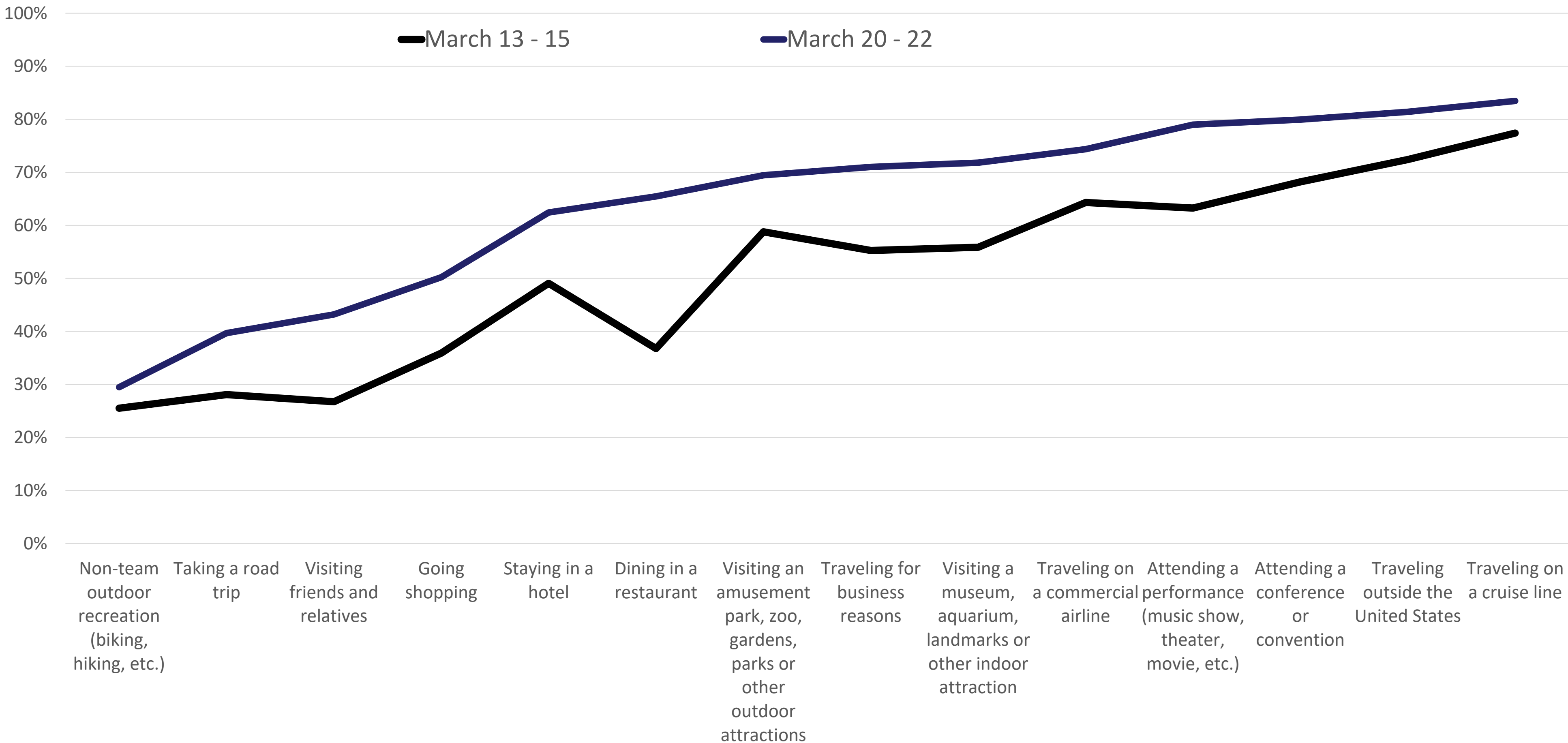
(Base: (Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



Perceived Safety of Travel Activities (Waves 1-5 Comparison)

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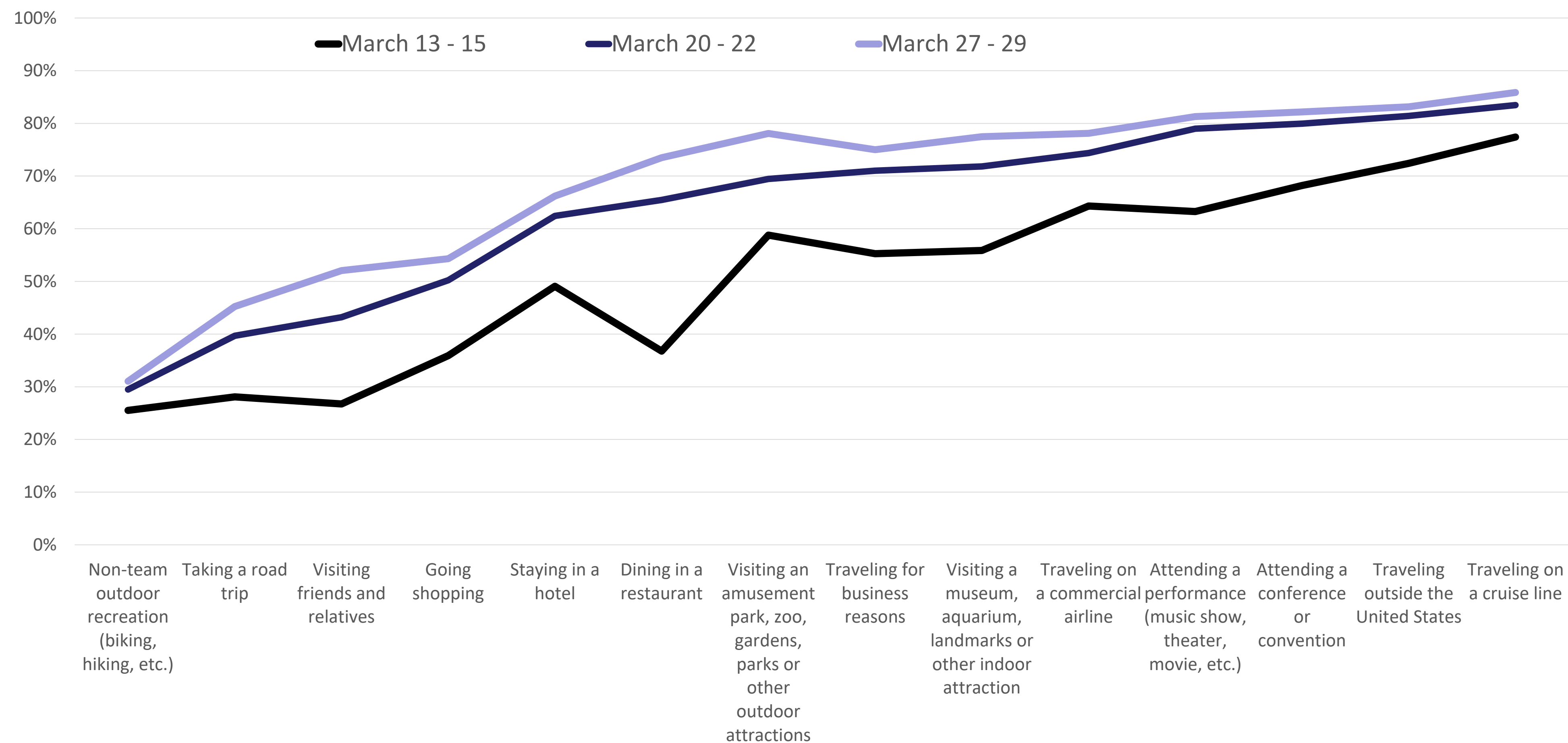
(Base: (Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



Perceived Safety of Travel Activities (Waves 1-5 Comparison)

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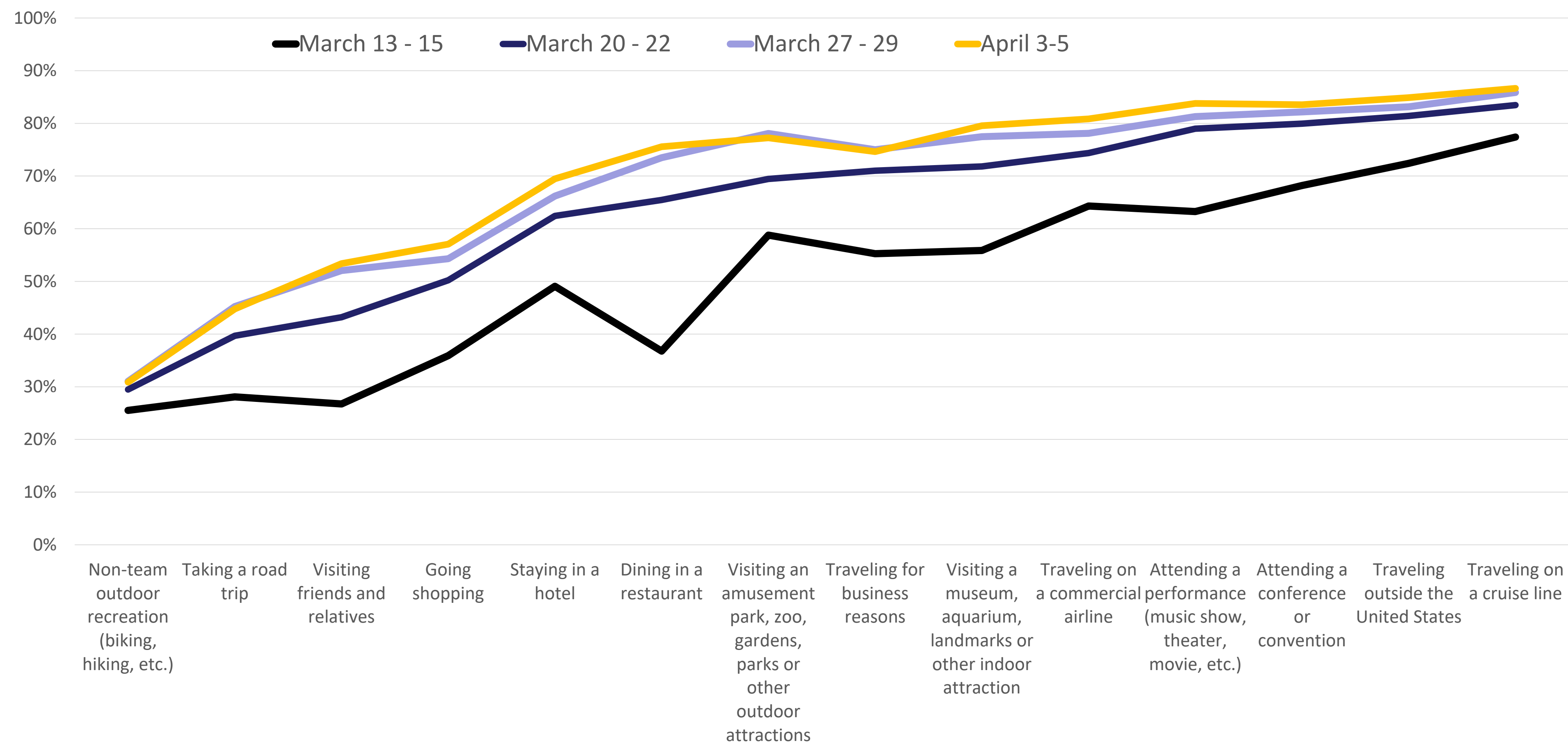
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Perceived Safety of Travel Activities (Waves 1-5 Comparison)

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

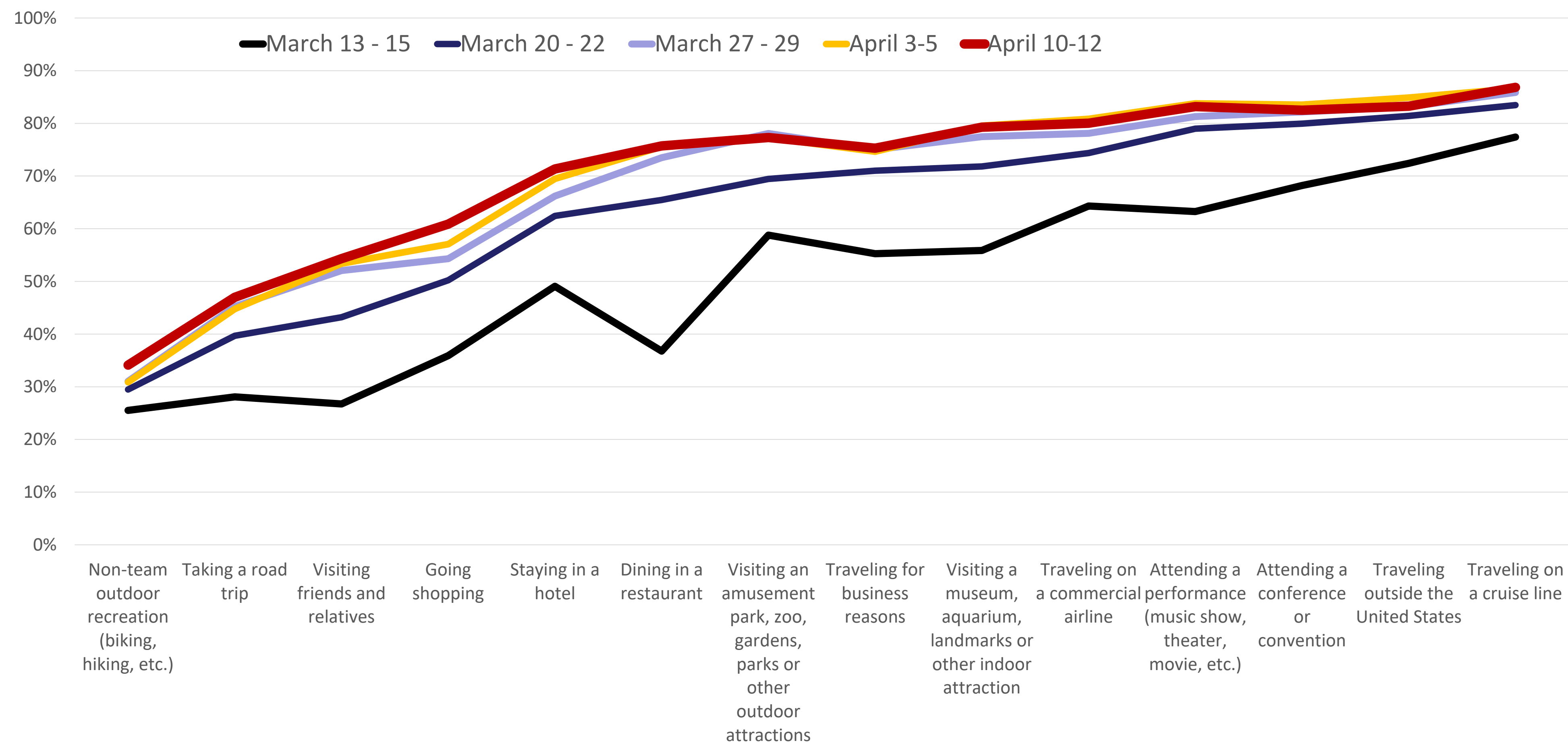
(Base: (Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



Perceived Safety of Travel Activities (Waves 1-5 Comparison)

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

(Base: (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)





Concerns for:

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

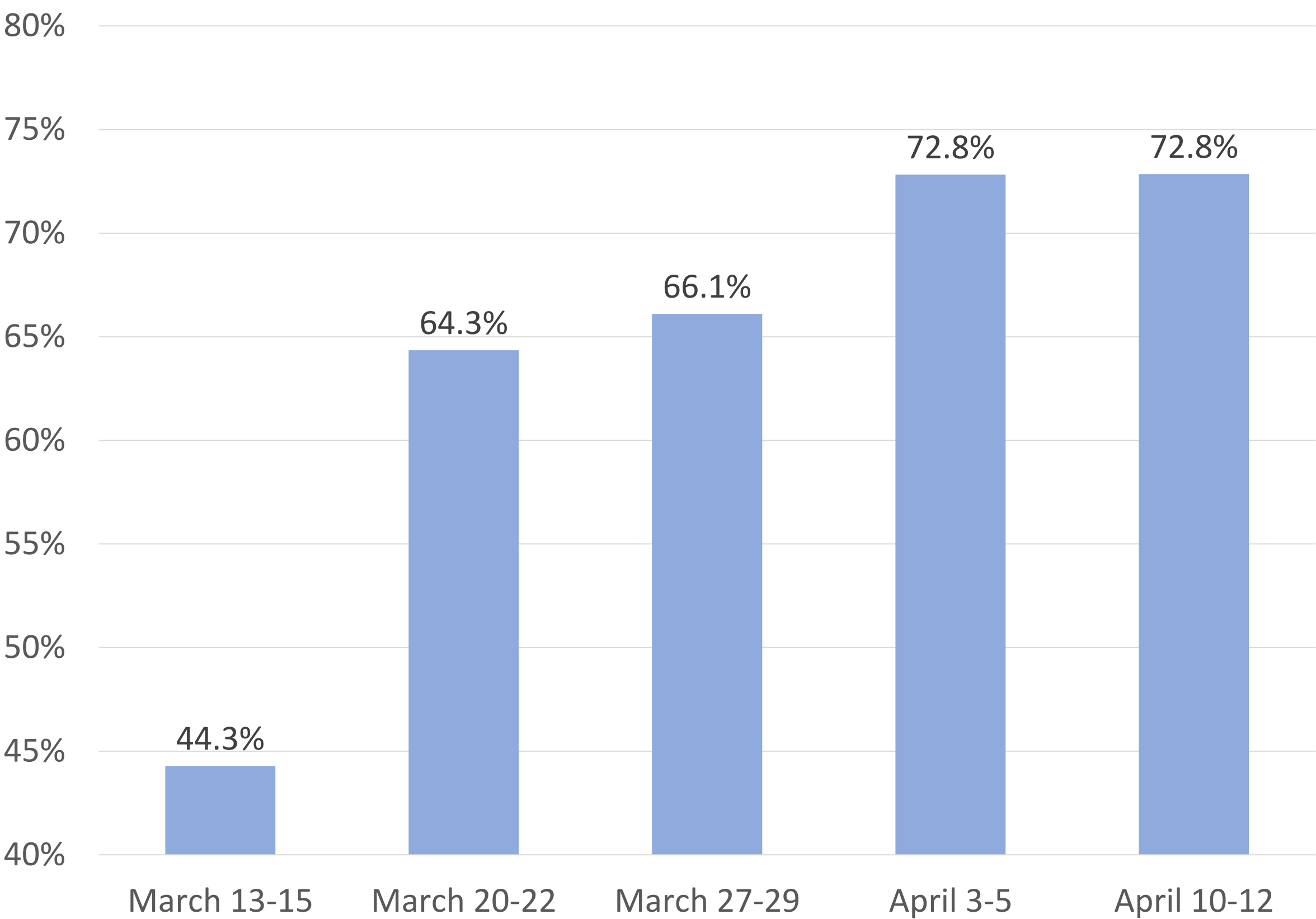
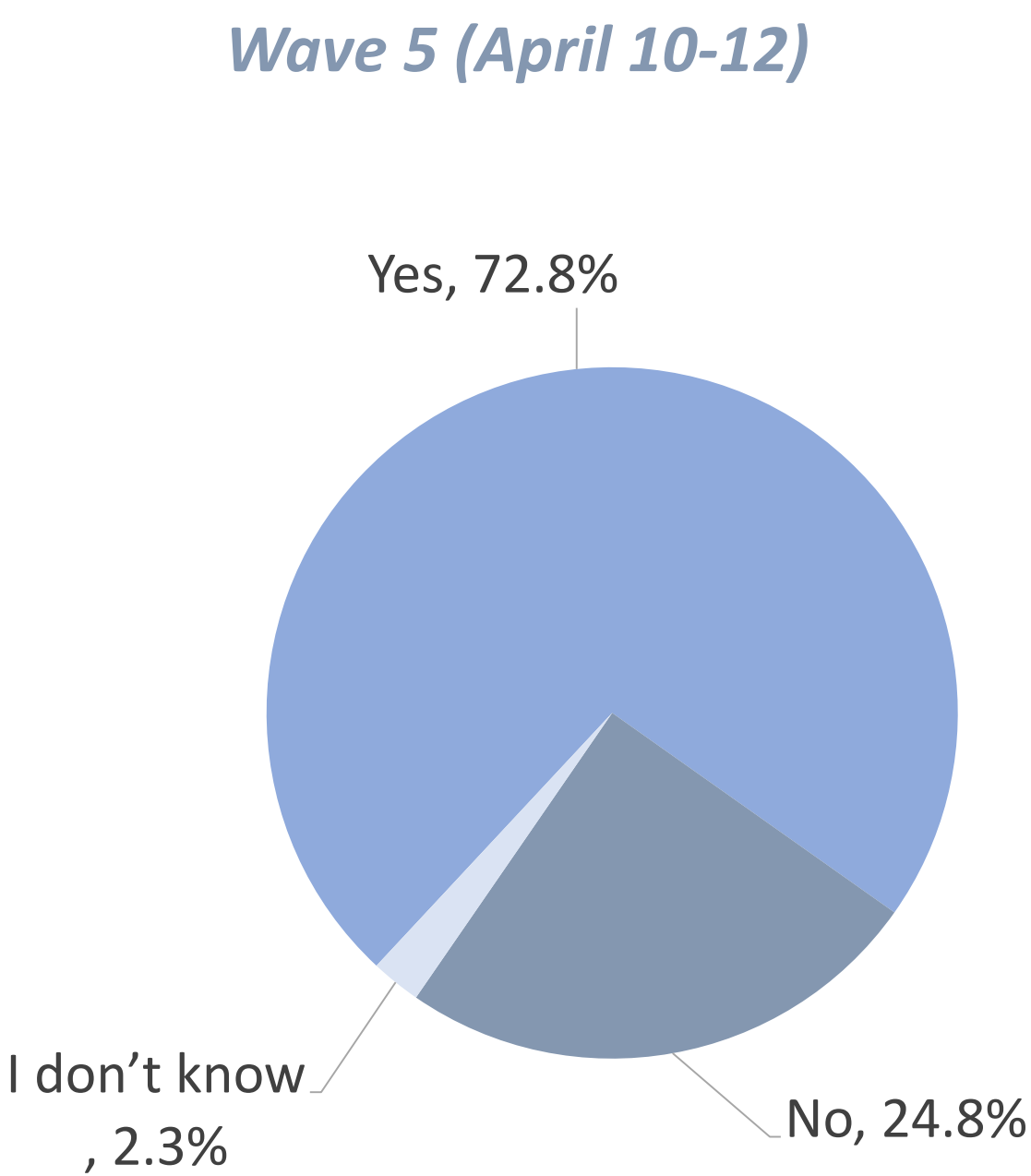
Highly elevated, yet seem to have slowed or even topped-out

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 monitor displaying a blue screen. The ceiling is high and features a complex network of white structural beams and large glass panels that 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.)

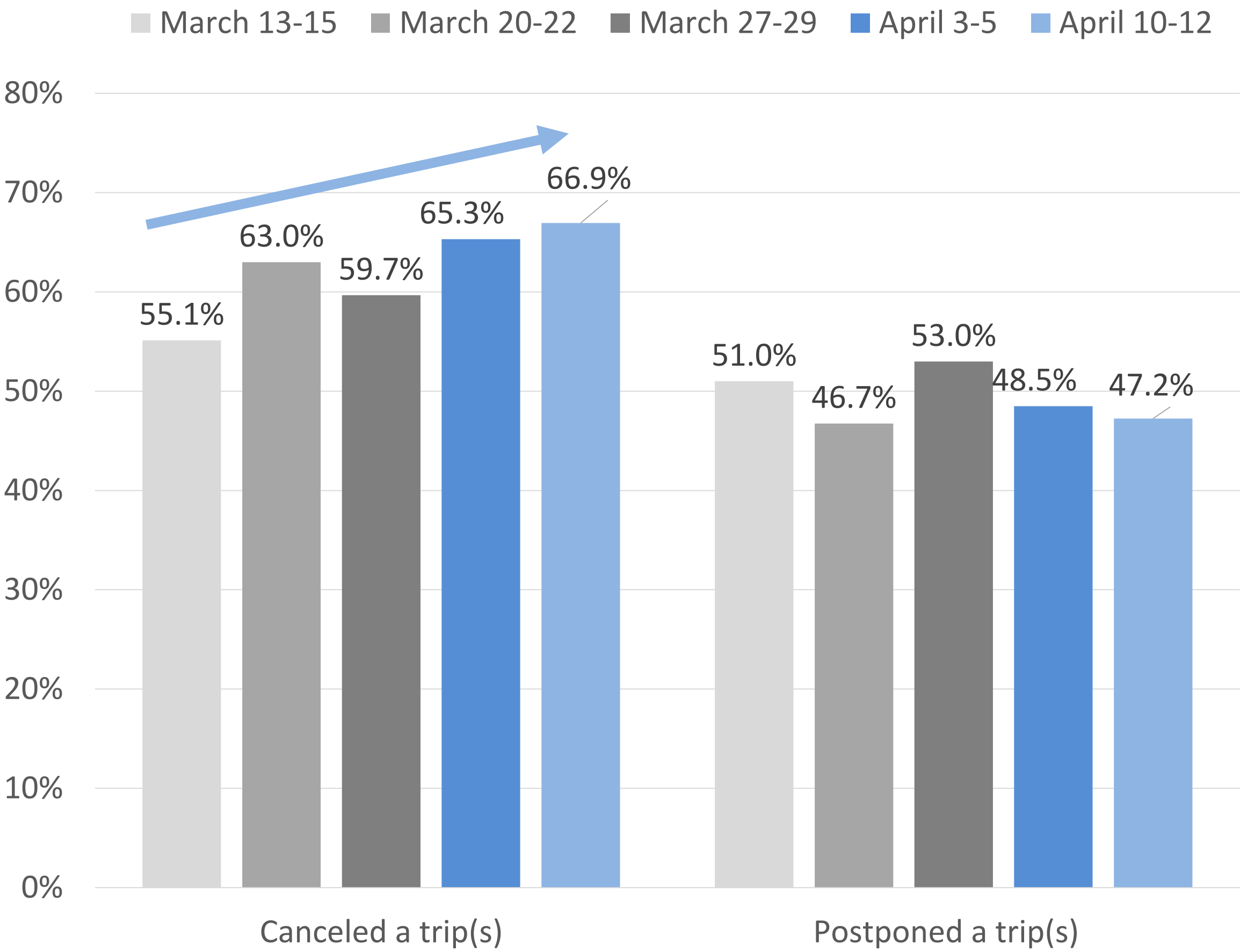
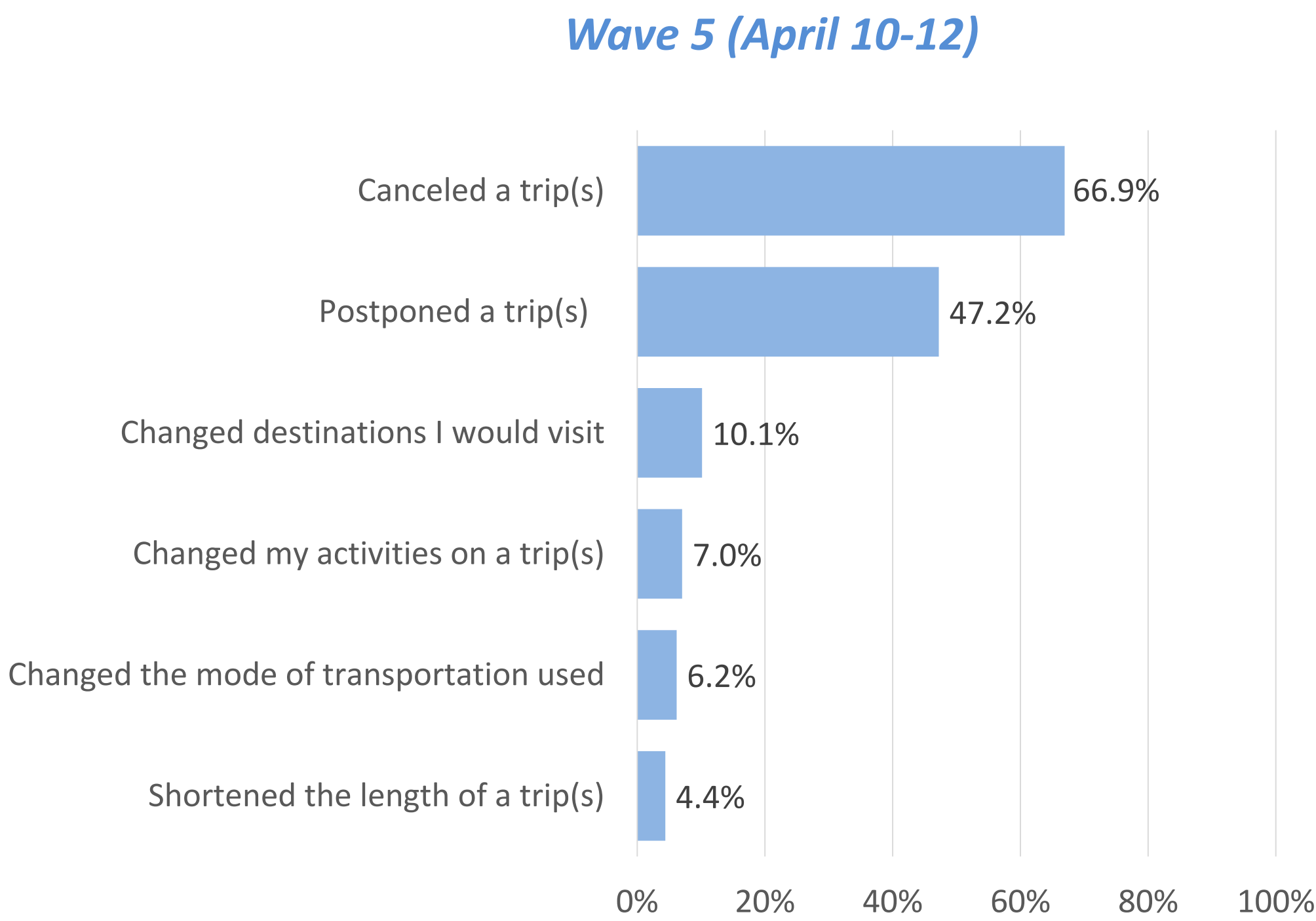


(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12)

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_____.

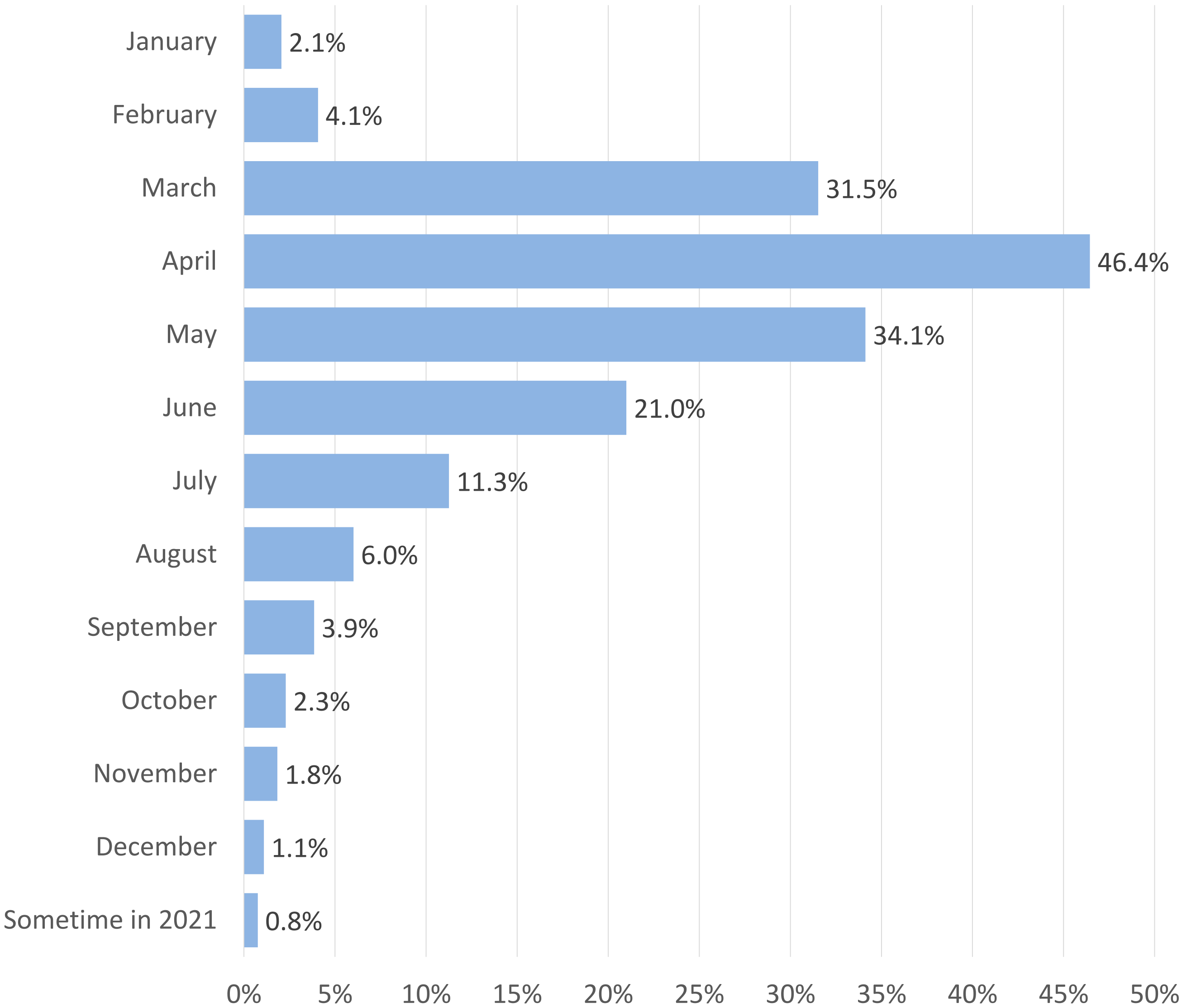


(Base: Respondents whose travel was impacted by the coronavirus, 553, 770, 795, 890, and 937 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Month of Trip Cancellation

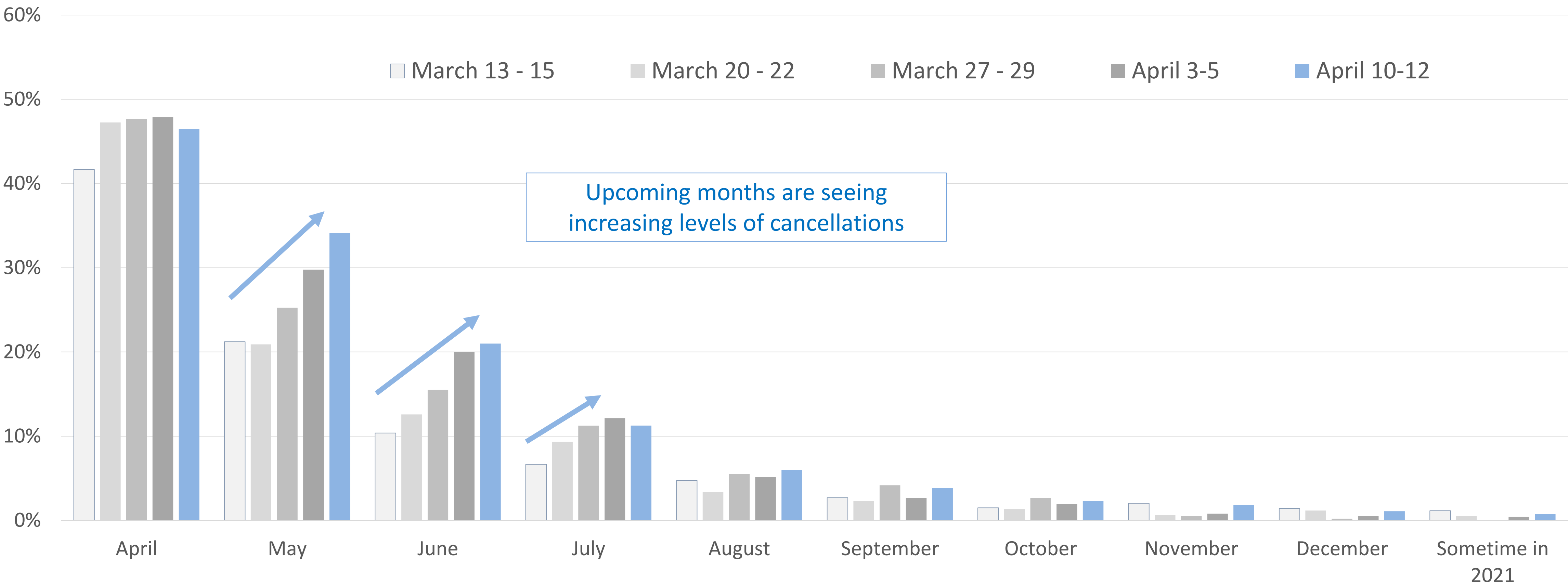
Question: The trip(s) you **CANCELED** would have taken place in which months? (Select all that apply)

*(Base: Cancelling trips, 624 completed surveys.
Data collected April 10-12, 2020)*



Month of Trip Cancellation

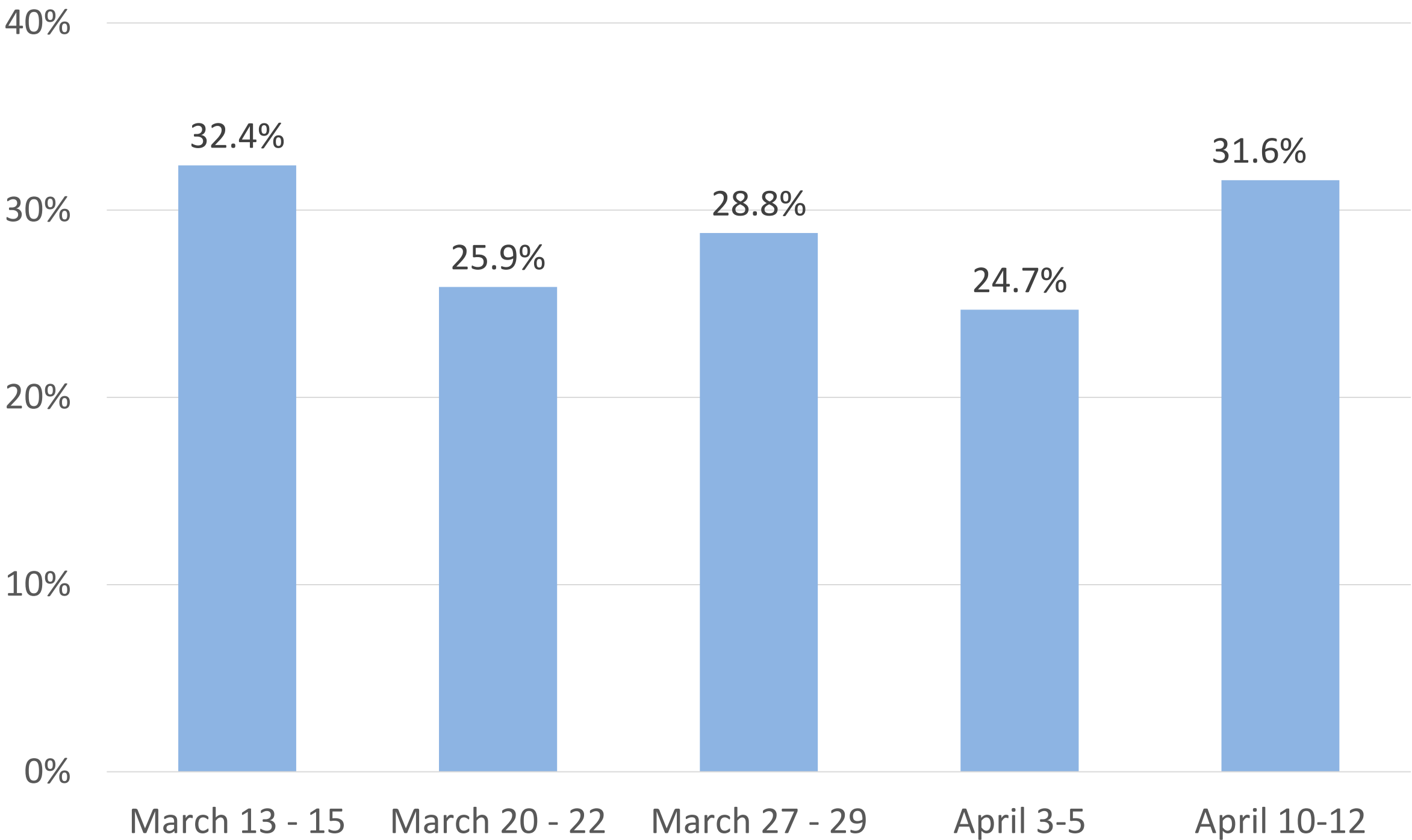
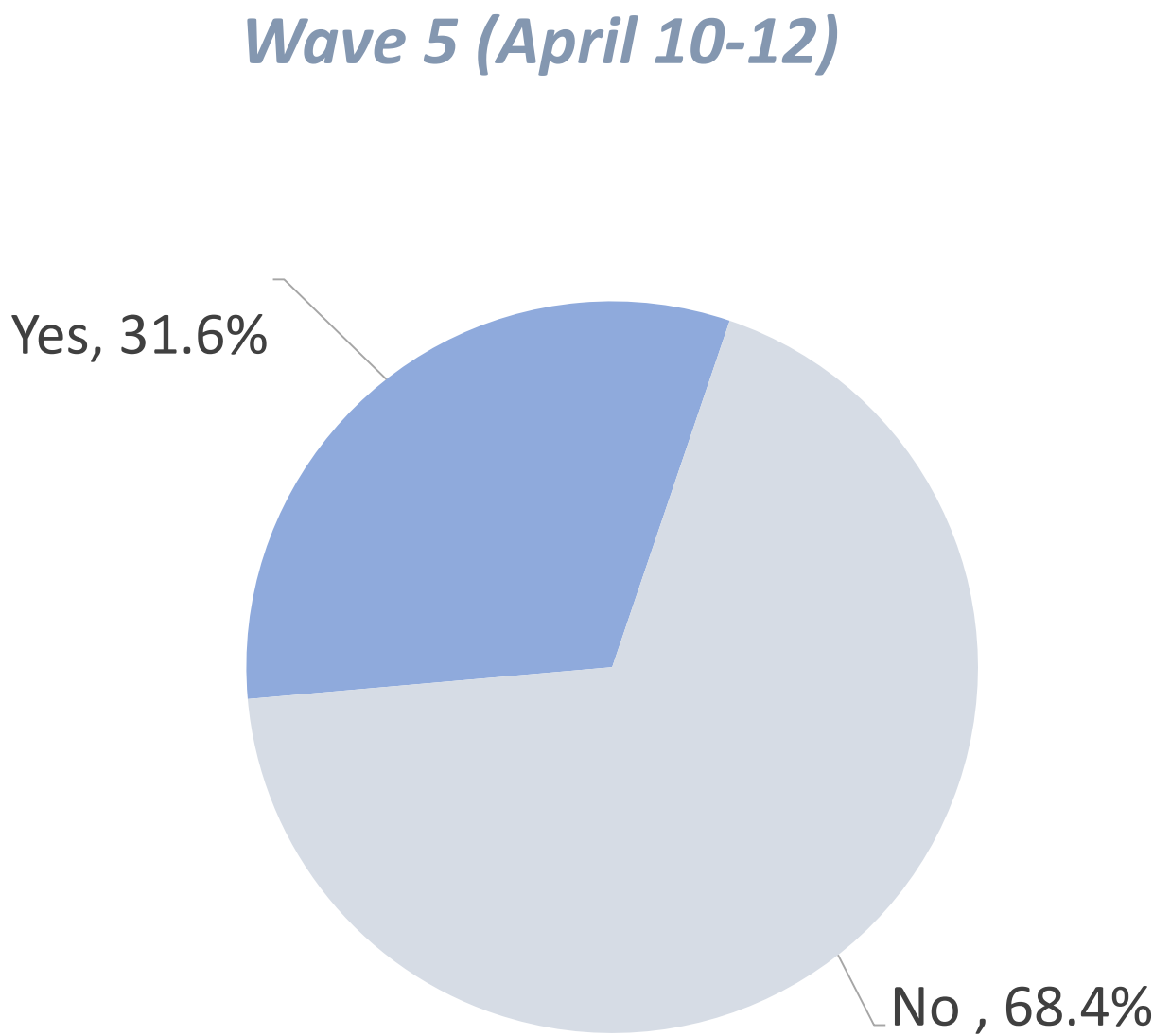
Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)



(Base: Cancelling trips, 292, 477, 506, 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.)

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)

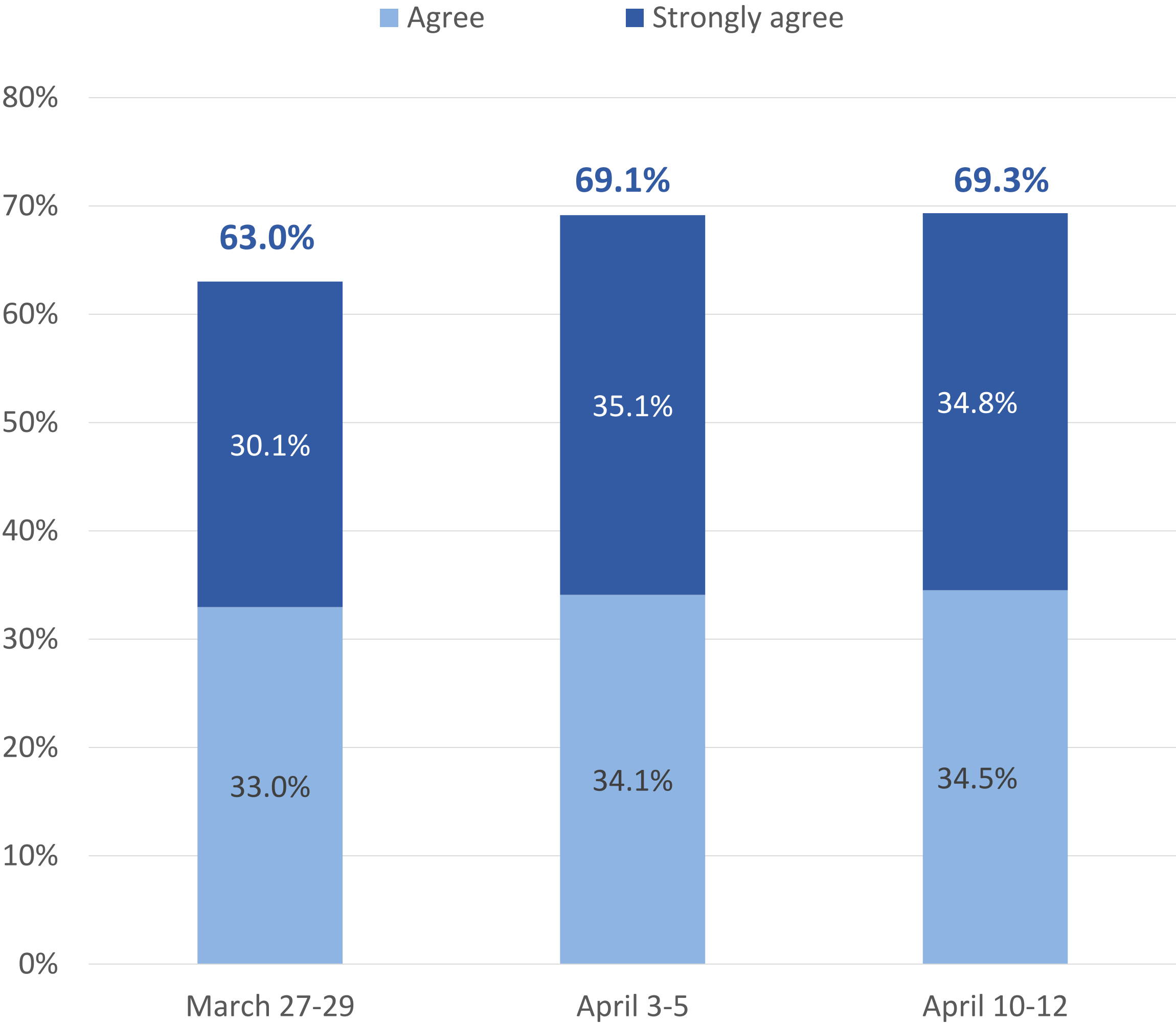
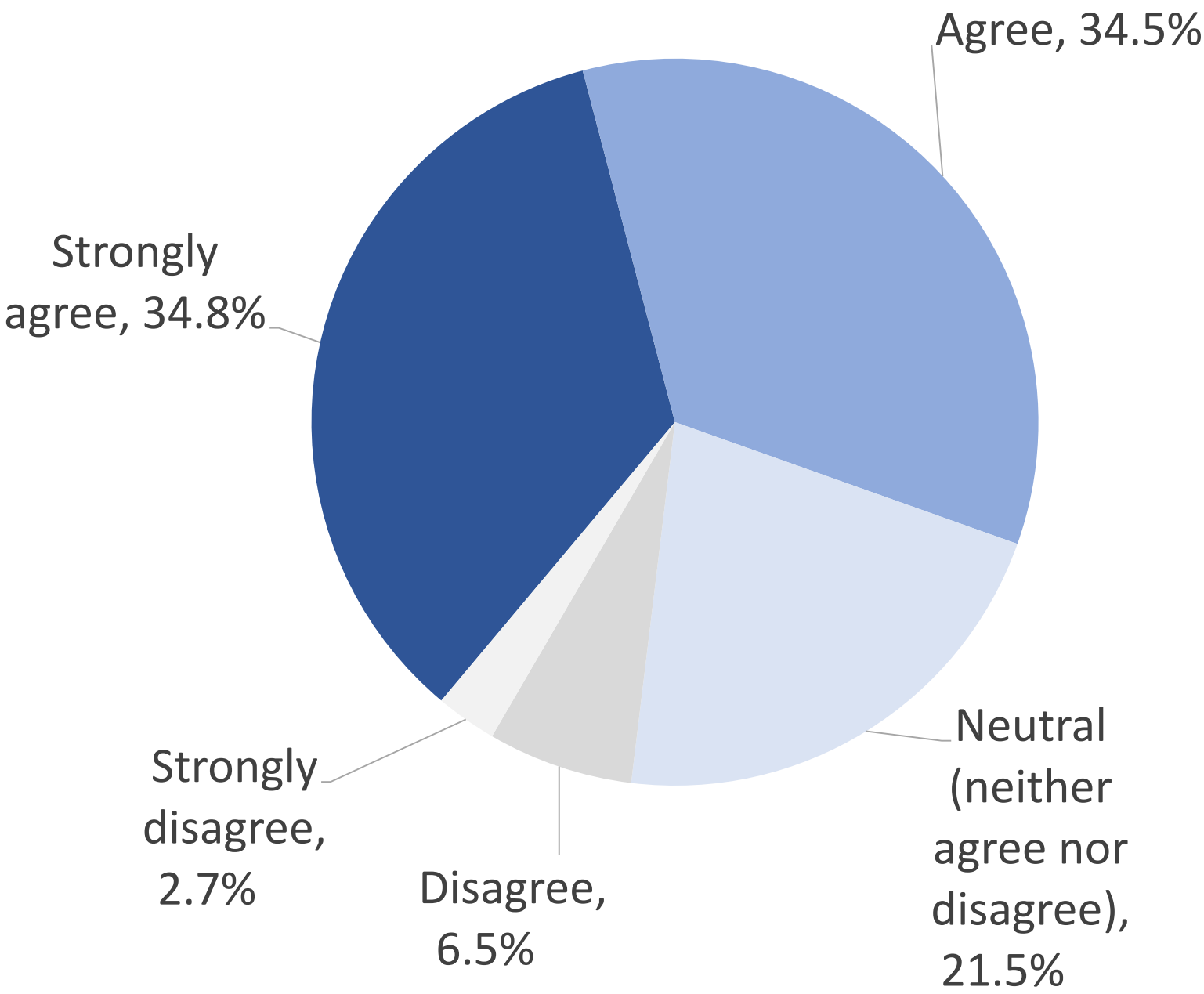
Impact on Sentiment & Perceptions



Excitement to Get Back to Travel

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

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 test the waters first



I'll get back in but carefully



I'll jump right back in

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



47.0%

I'll get back in but carefully



39.9%

I'll test the waters first



13.1%

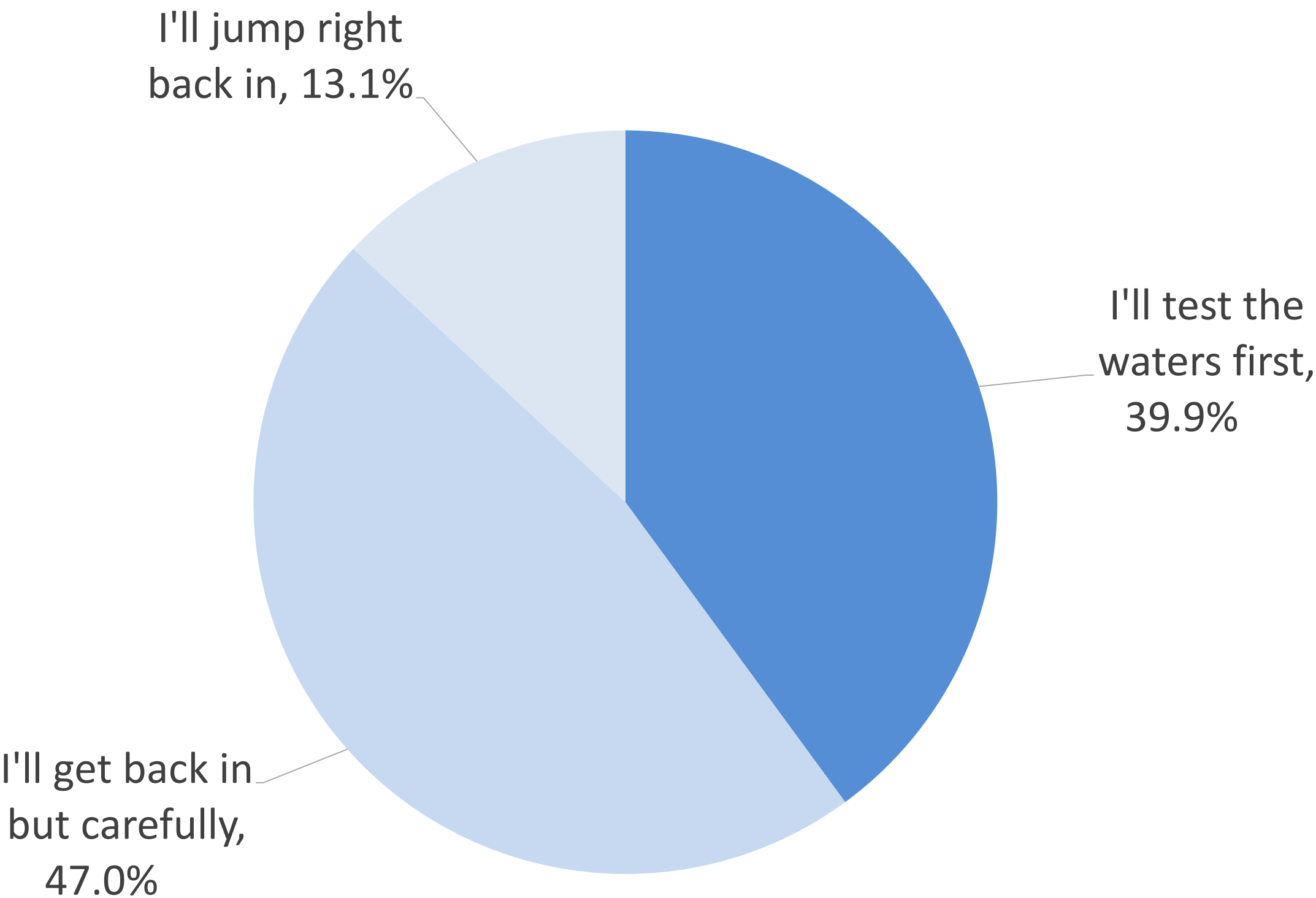
I'll jump right back in

How Will They Get Back to Travel?

New Question Added in Wave 5

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)

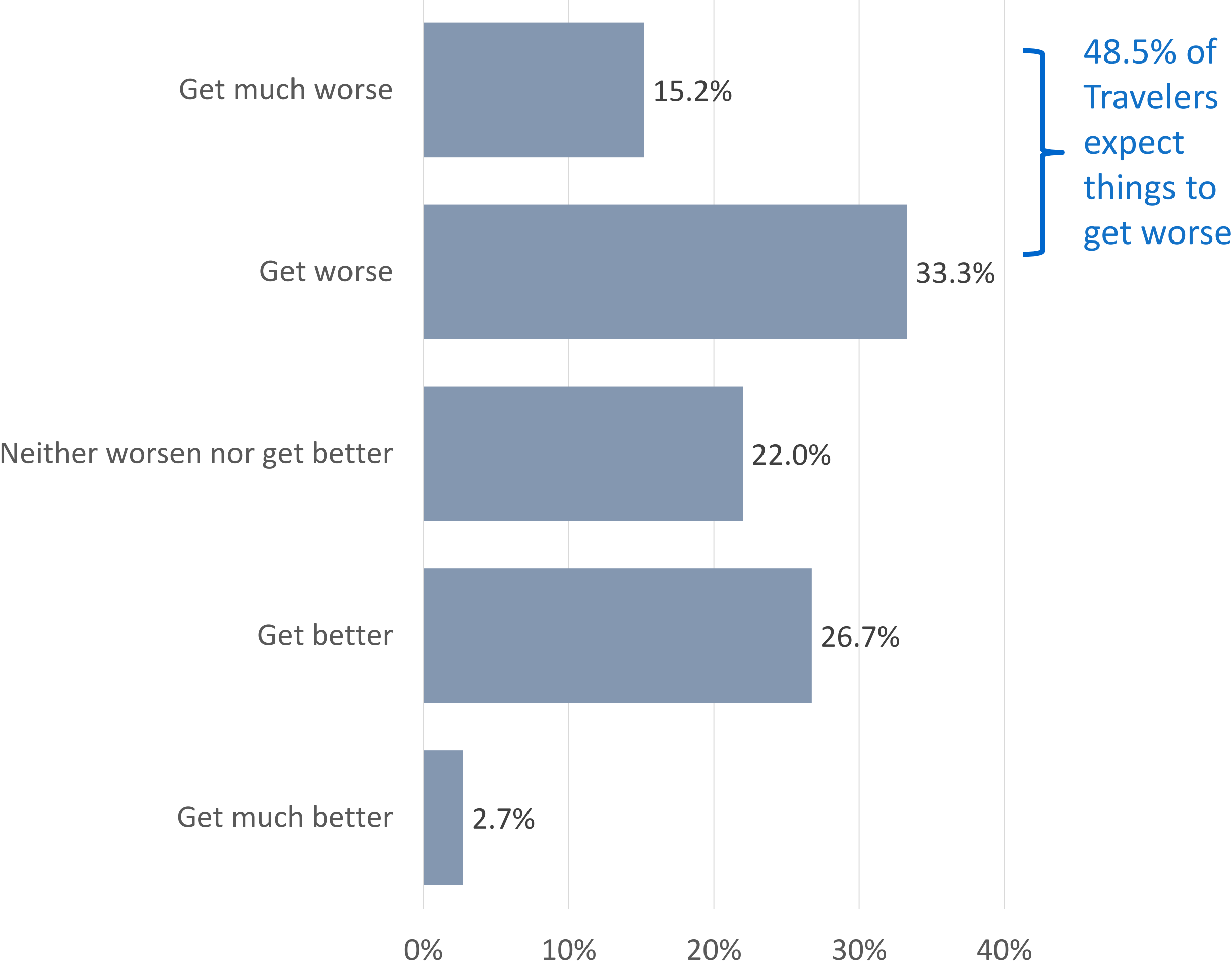


Expectations for Coronavirus Outbreak

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 _____

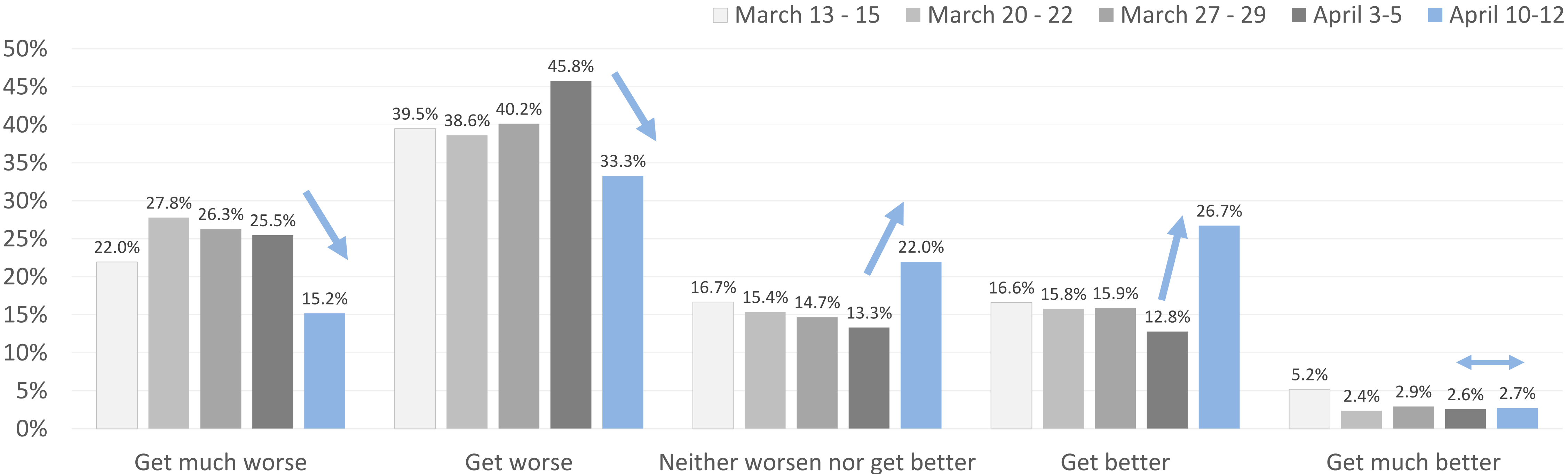
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)



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 _____



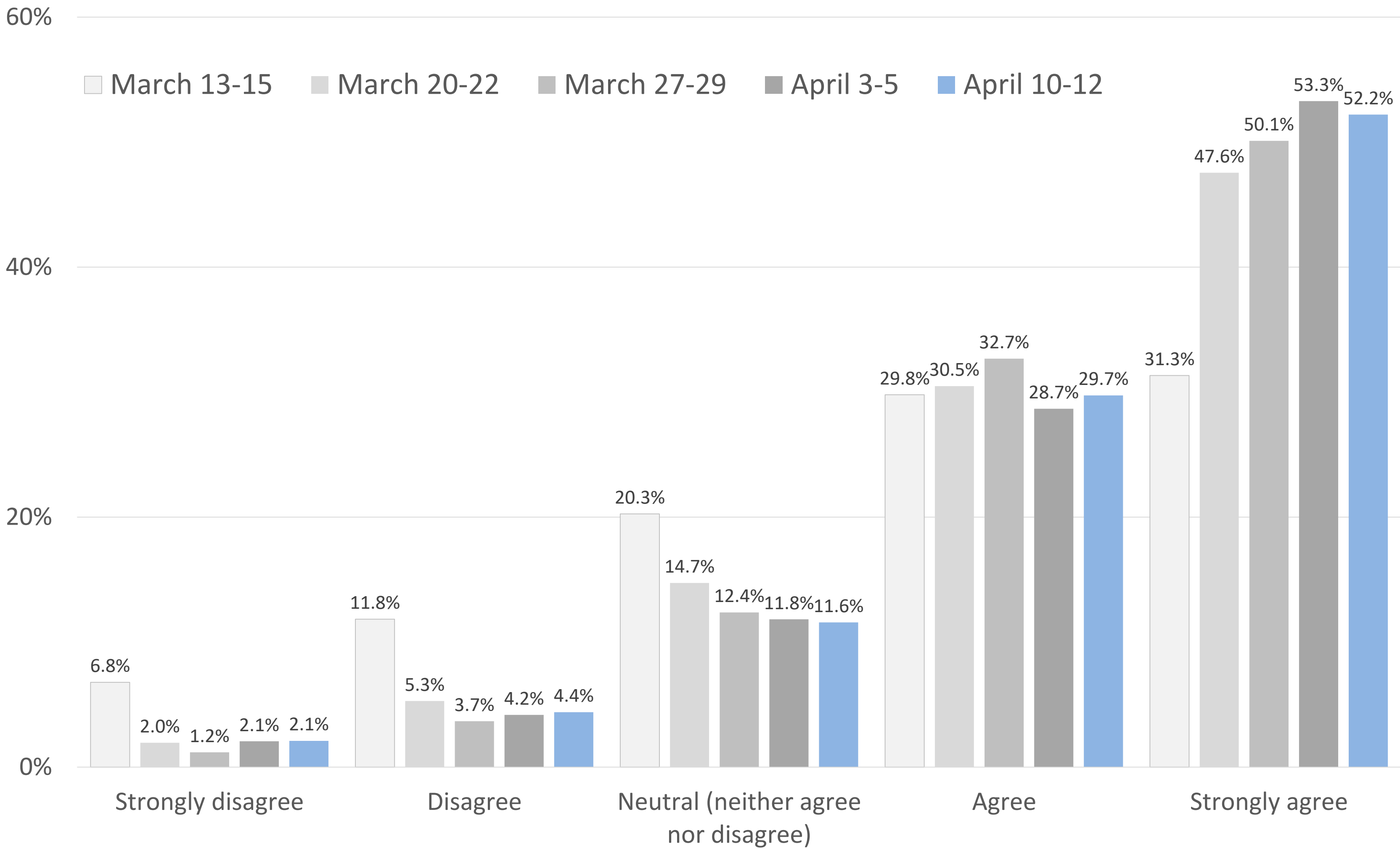
(Base: All respondents, 1,201, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5 and 10-12, 2020)

Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the coronavirus situation blows over.

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

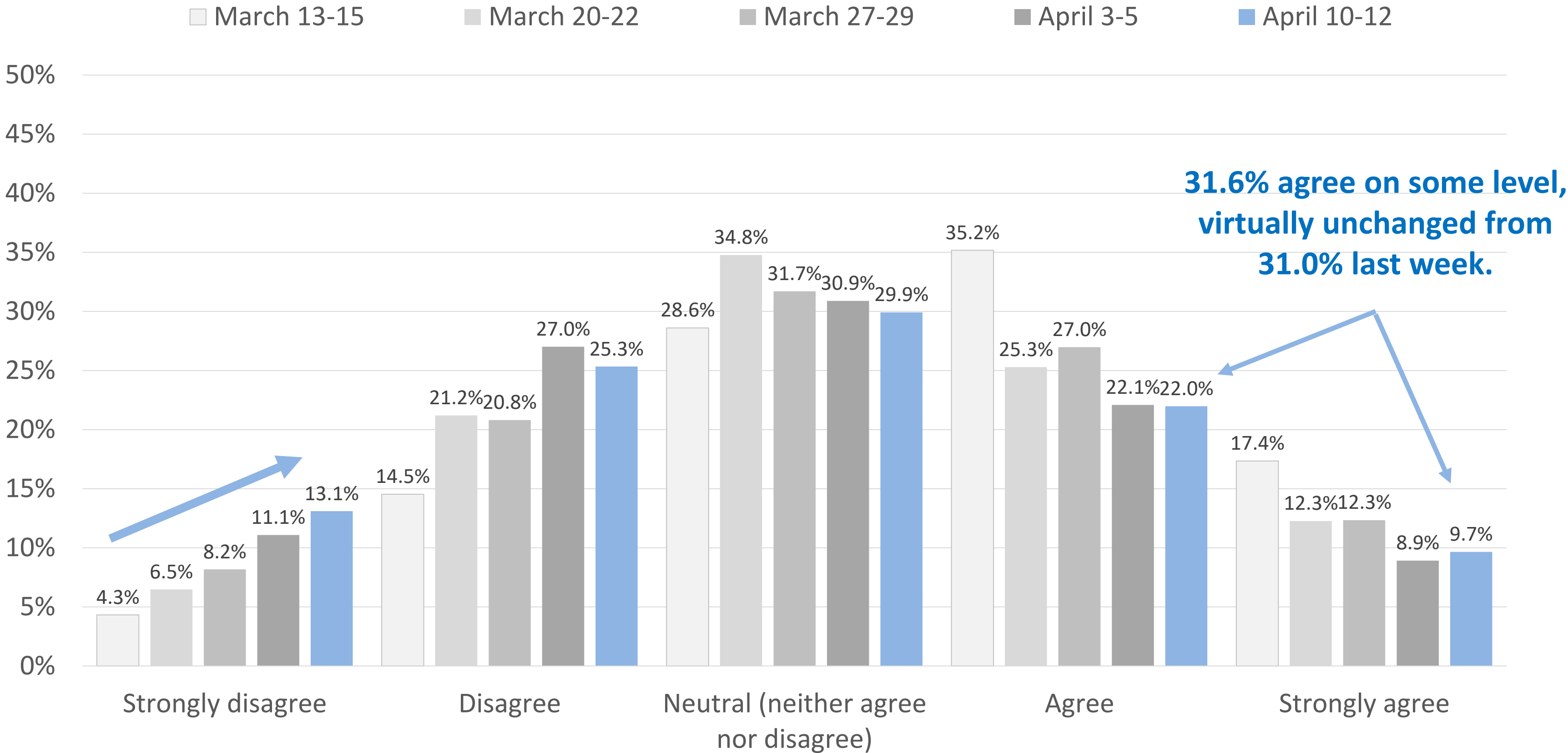


Expectations for Summer Travel Season

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



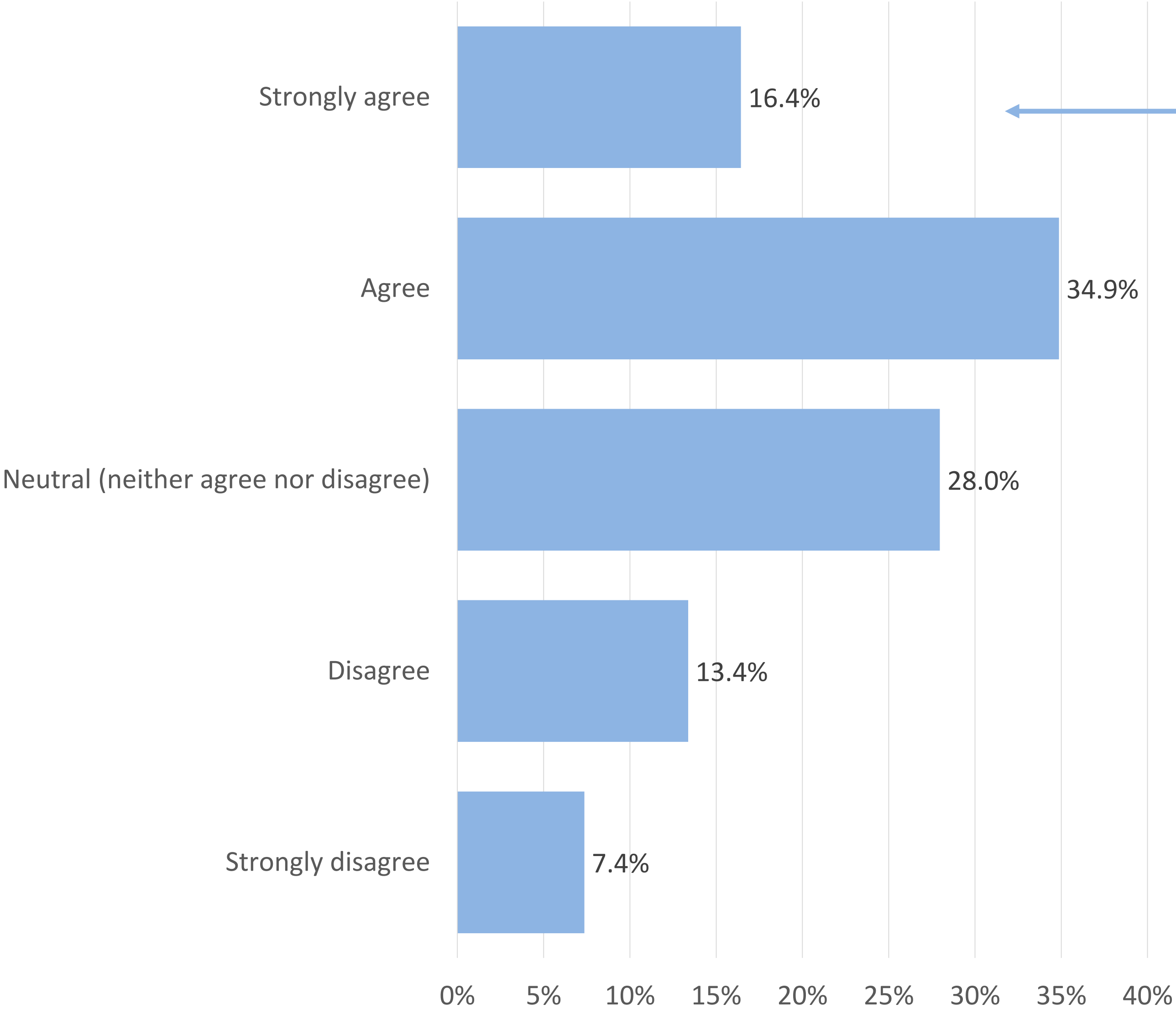
Expectations for Fall Travel Season

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 and 1,263 completed surveys. Data collected April 3-5, an 10-12 2020)

Question Added in Wave 4



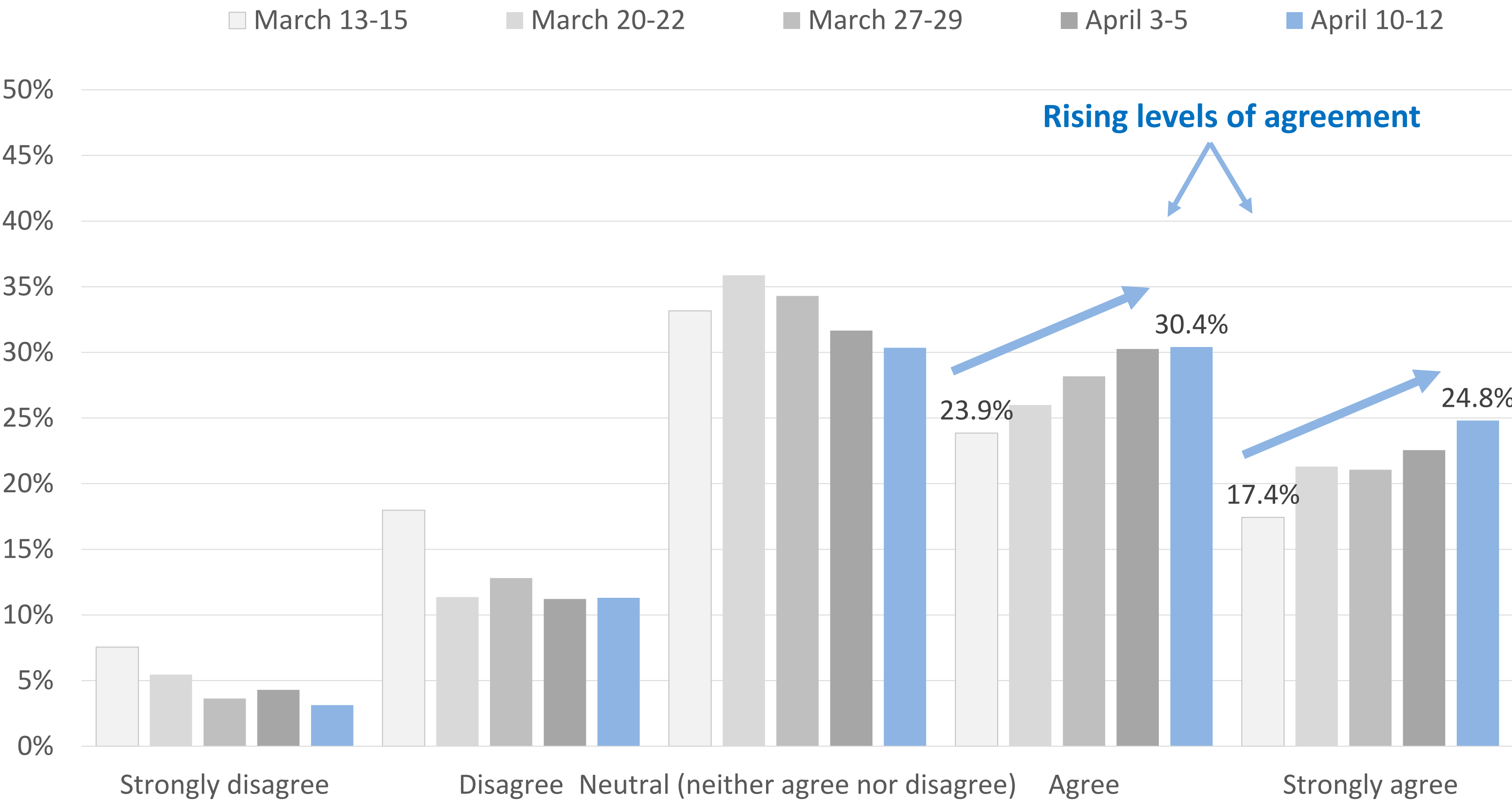
51.3% agree on some level, down slightly from 53.1% last week.

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

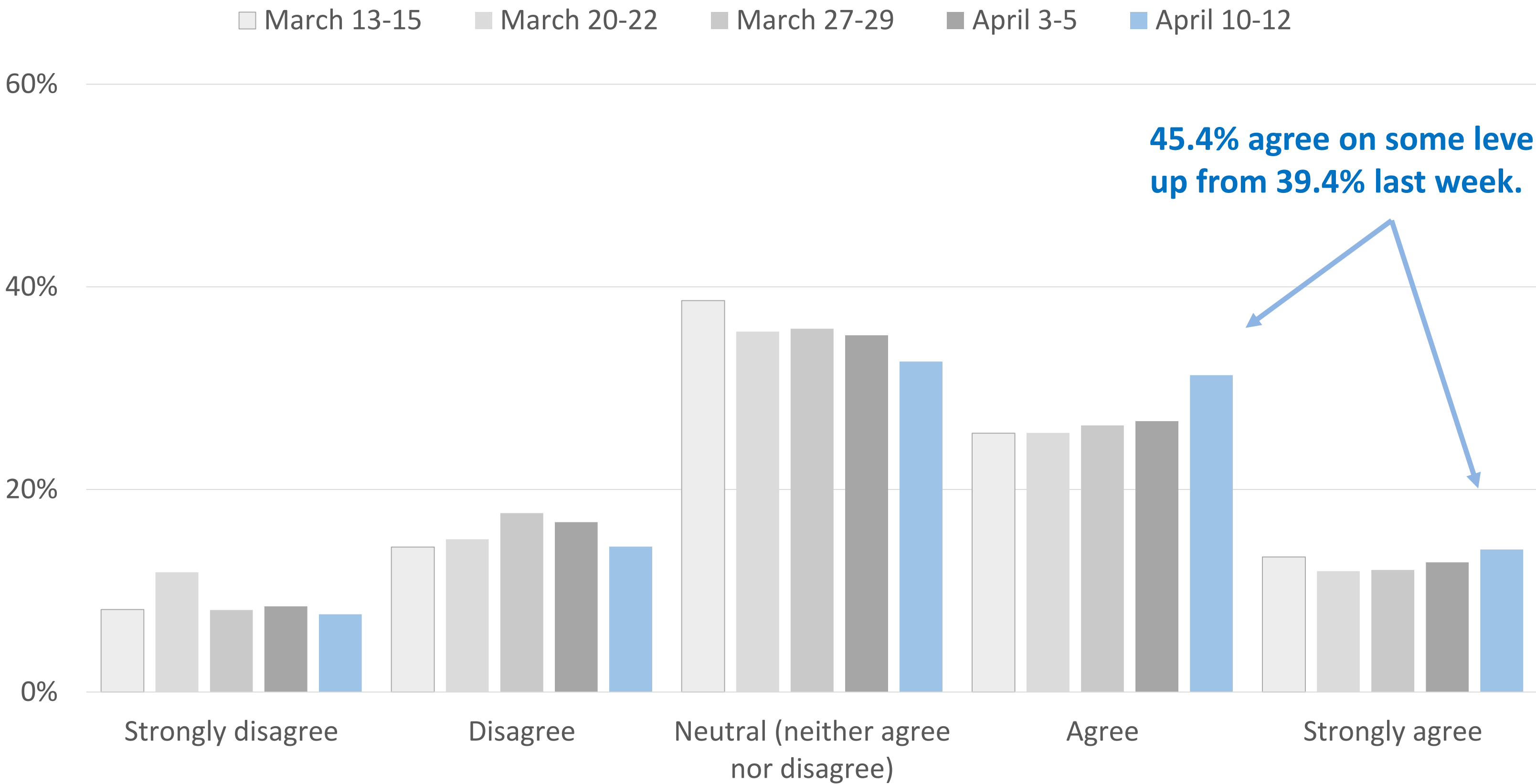


Replacing Air Travel with Road Trips

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

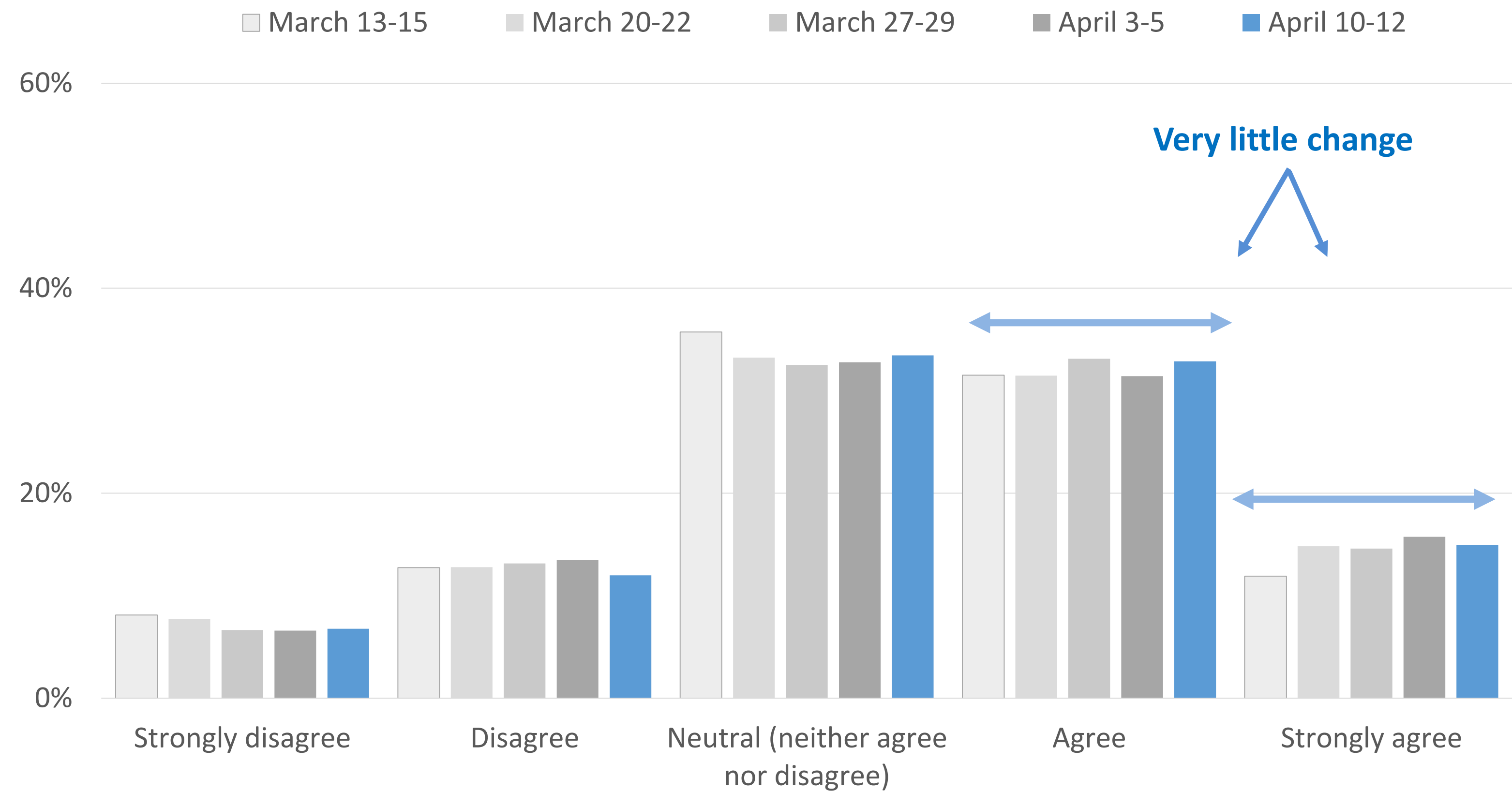


Replacing Long-Haul Travel with Regional Trips

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

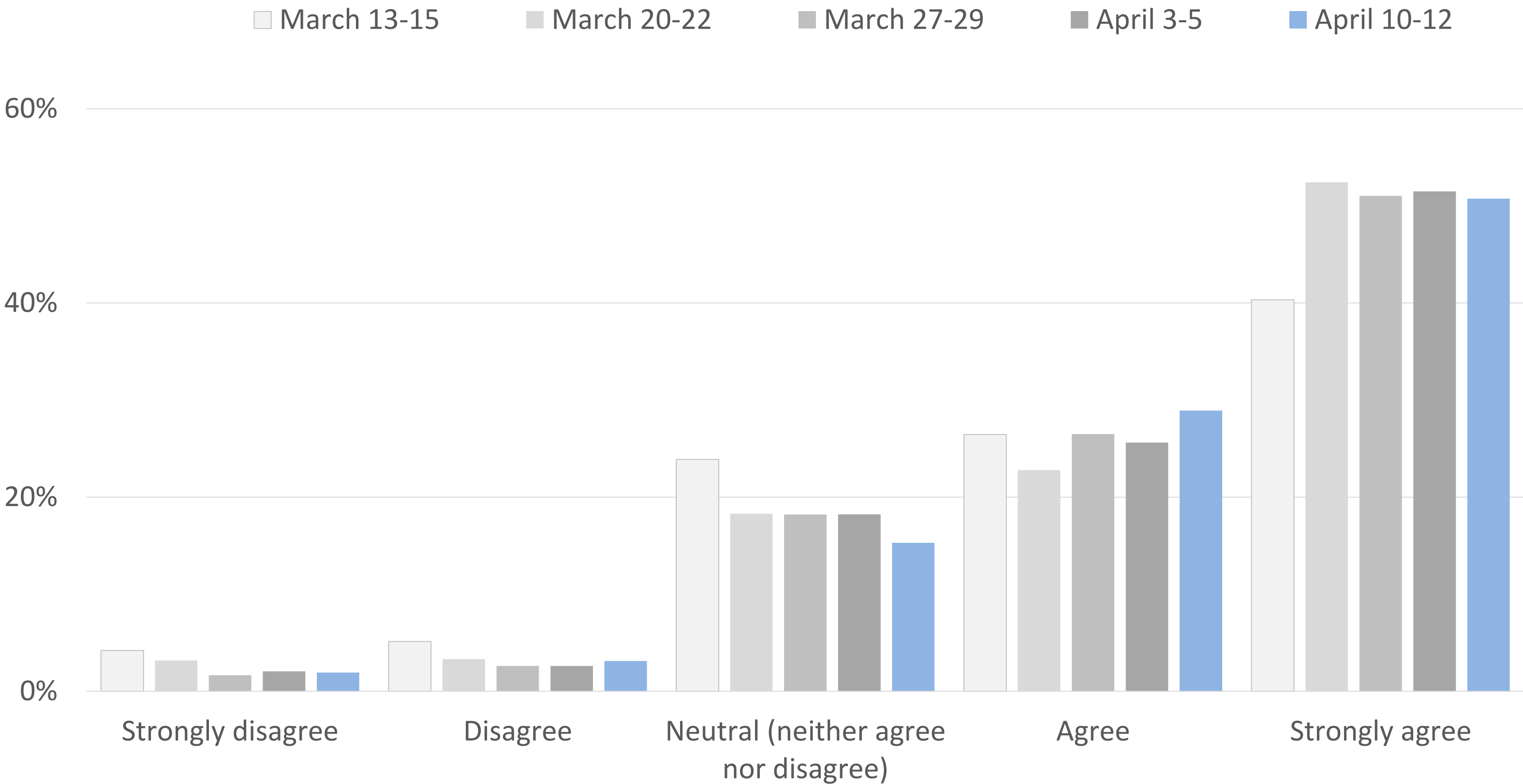


Avoiding Conventions & Conferences

How much do you agree with the following statement?

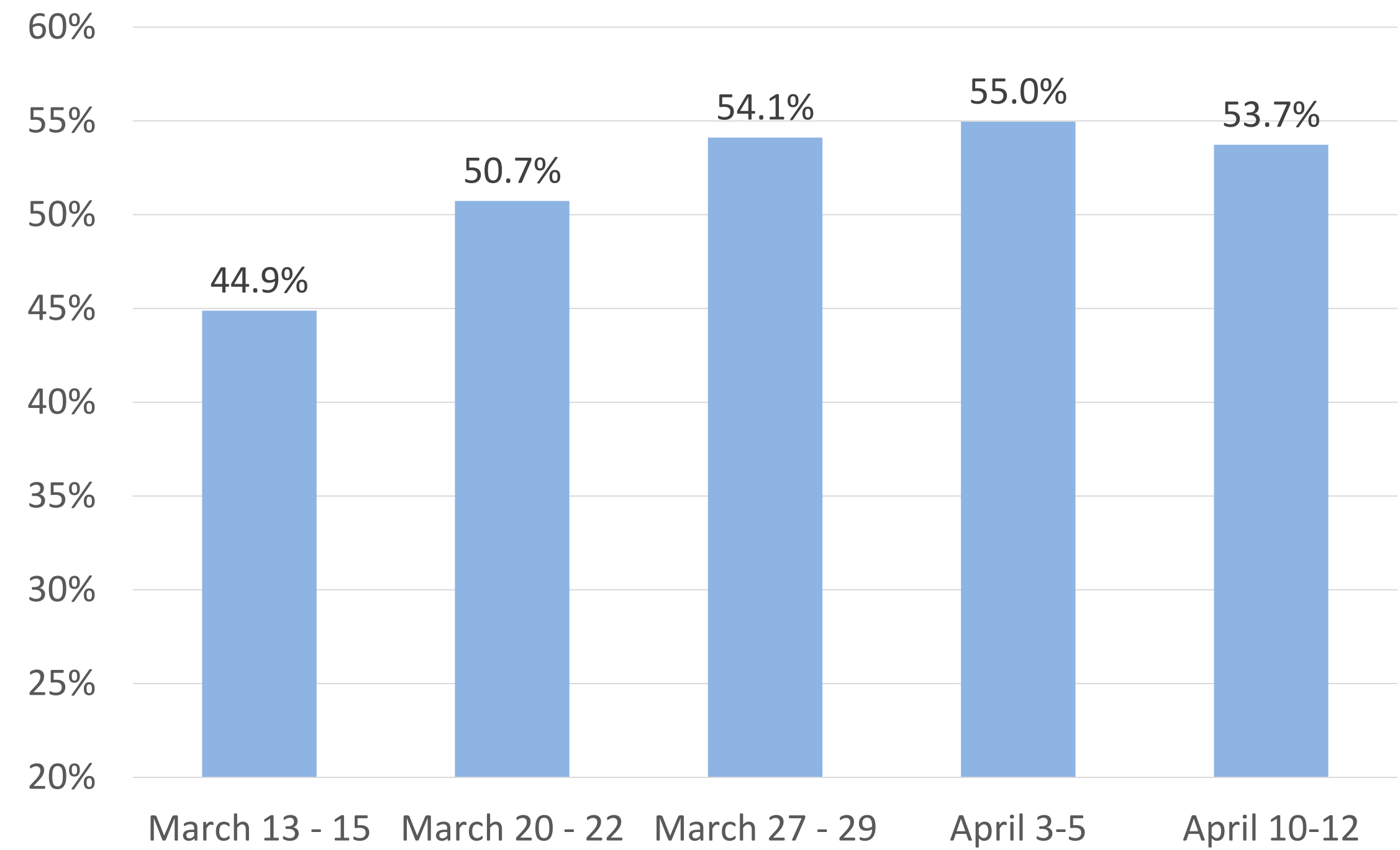
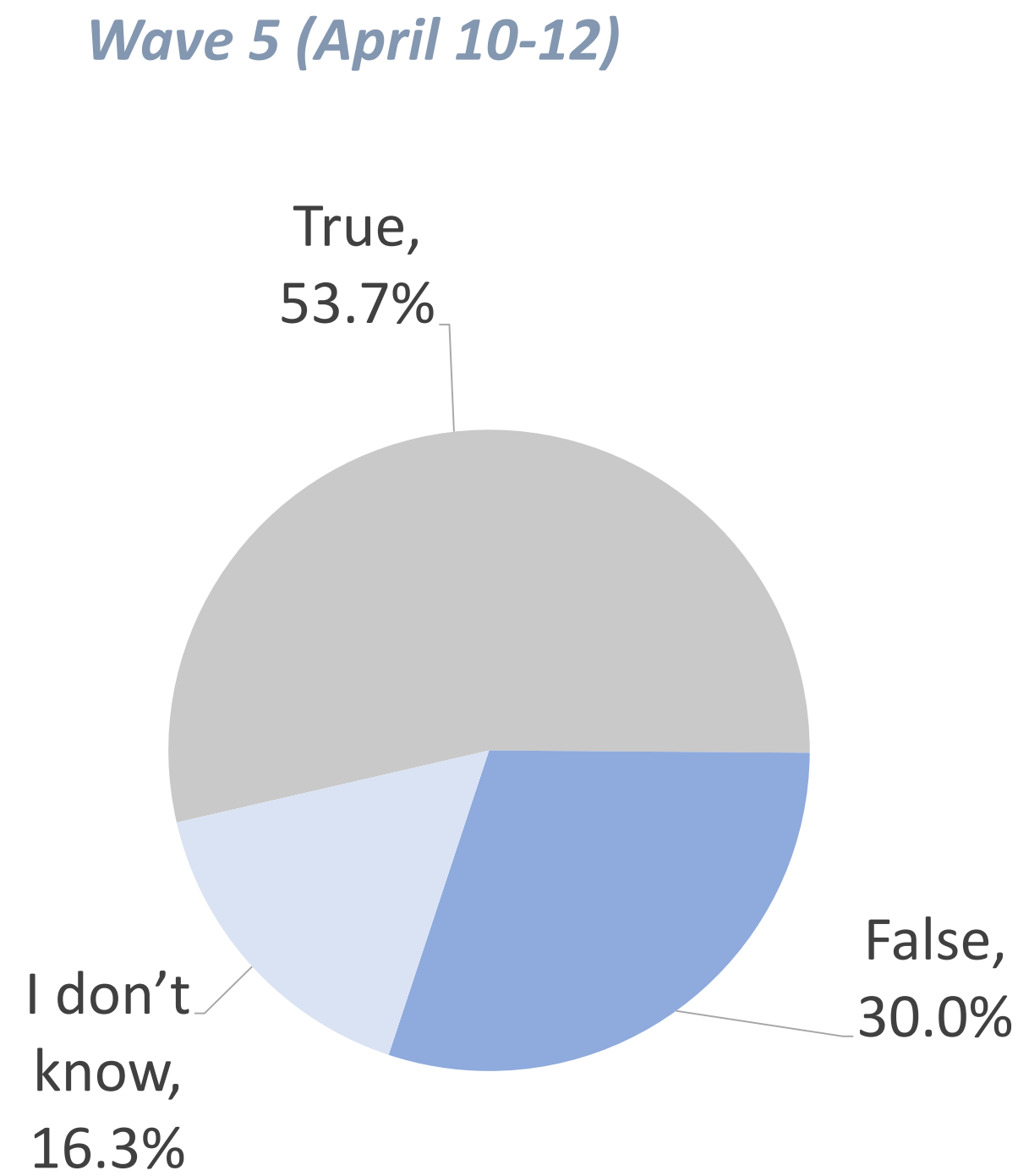
Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.

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



Business Travel Restrictions

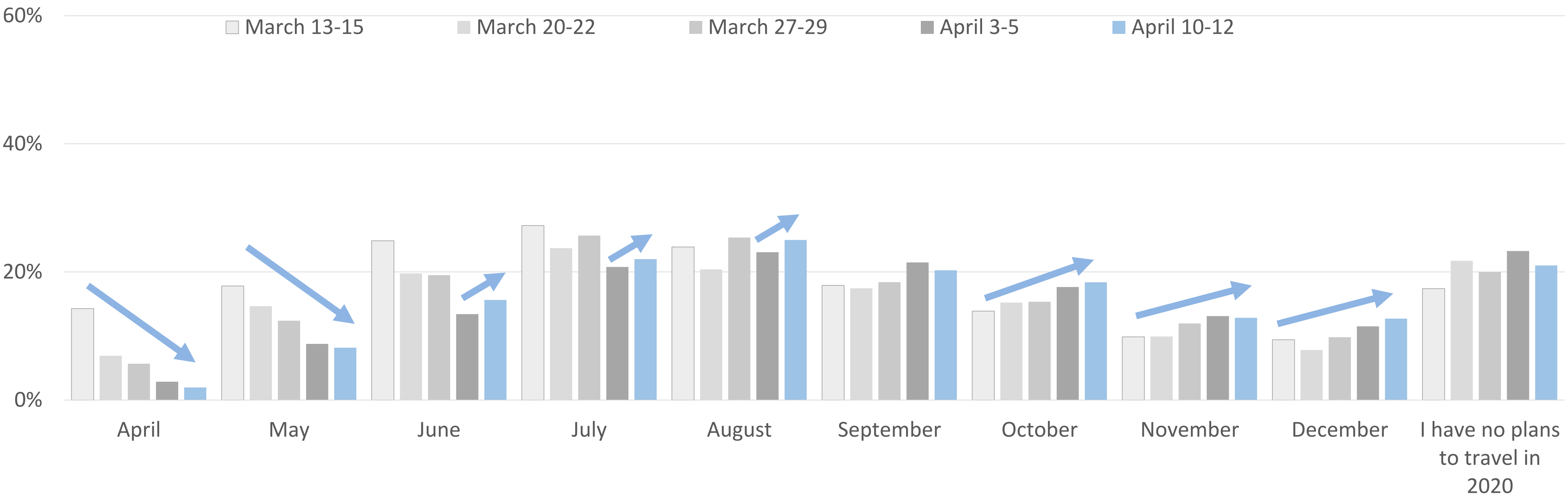
True or False: My employer has put travel restrictions in place due to the coronavirus situation.



(Base: Employed respondents, 909, 916, 753 and 1,041 completed surveys. Data collected March 13-15, 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?



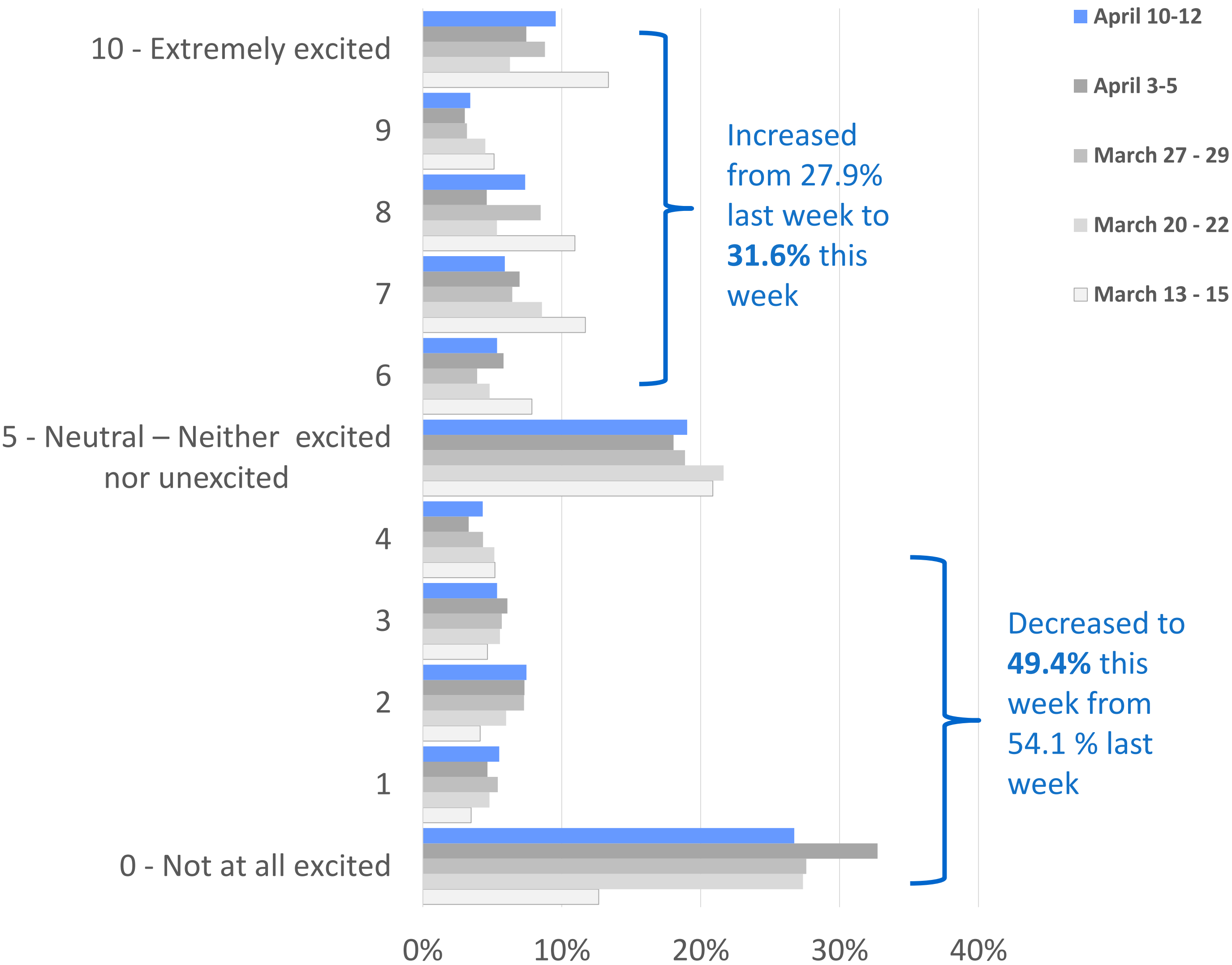
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)

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)

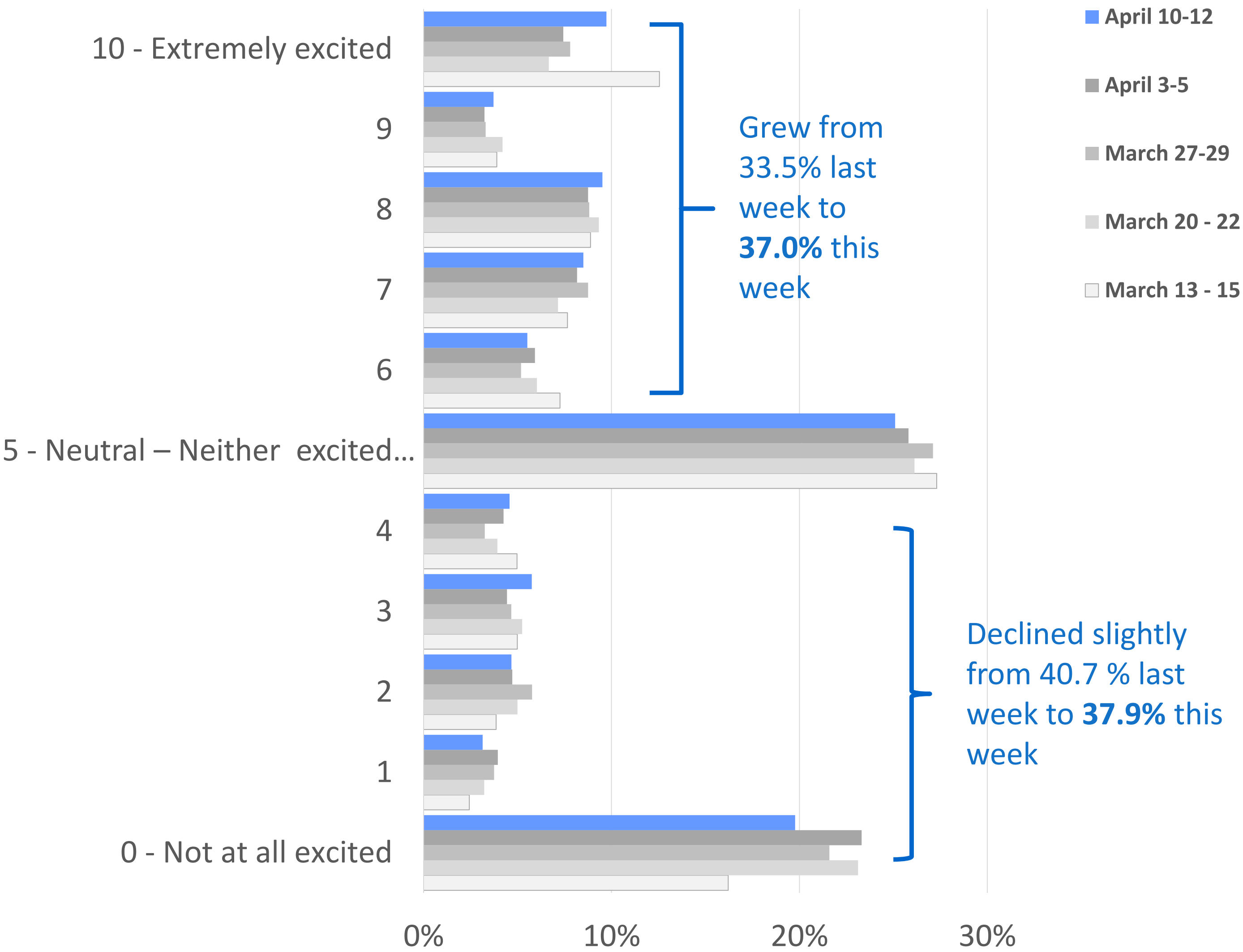
(Base: All respondents, 1,200, 1,201, 1,216 and 1,263 completed surveys. Data collected March 20-22, 27-29 and April 3-5, and 10-12, 2020)



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)



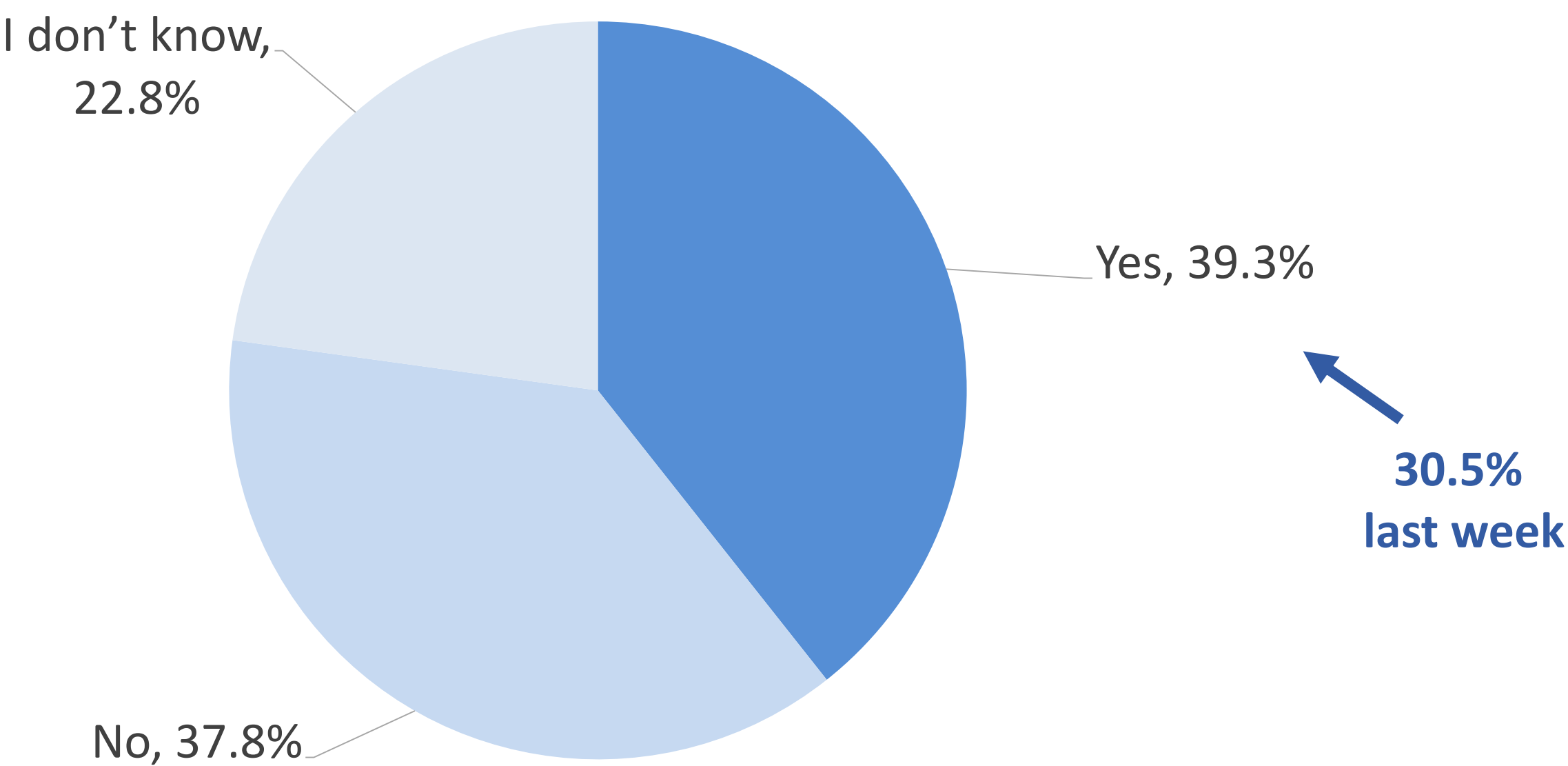
Changes in Travel after the Coronavirus Crisis

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



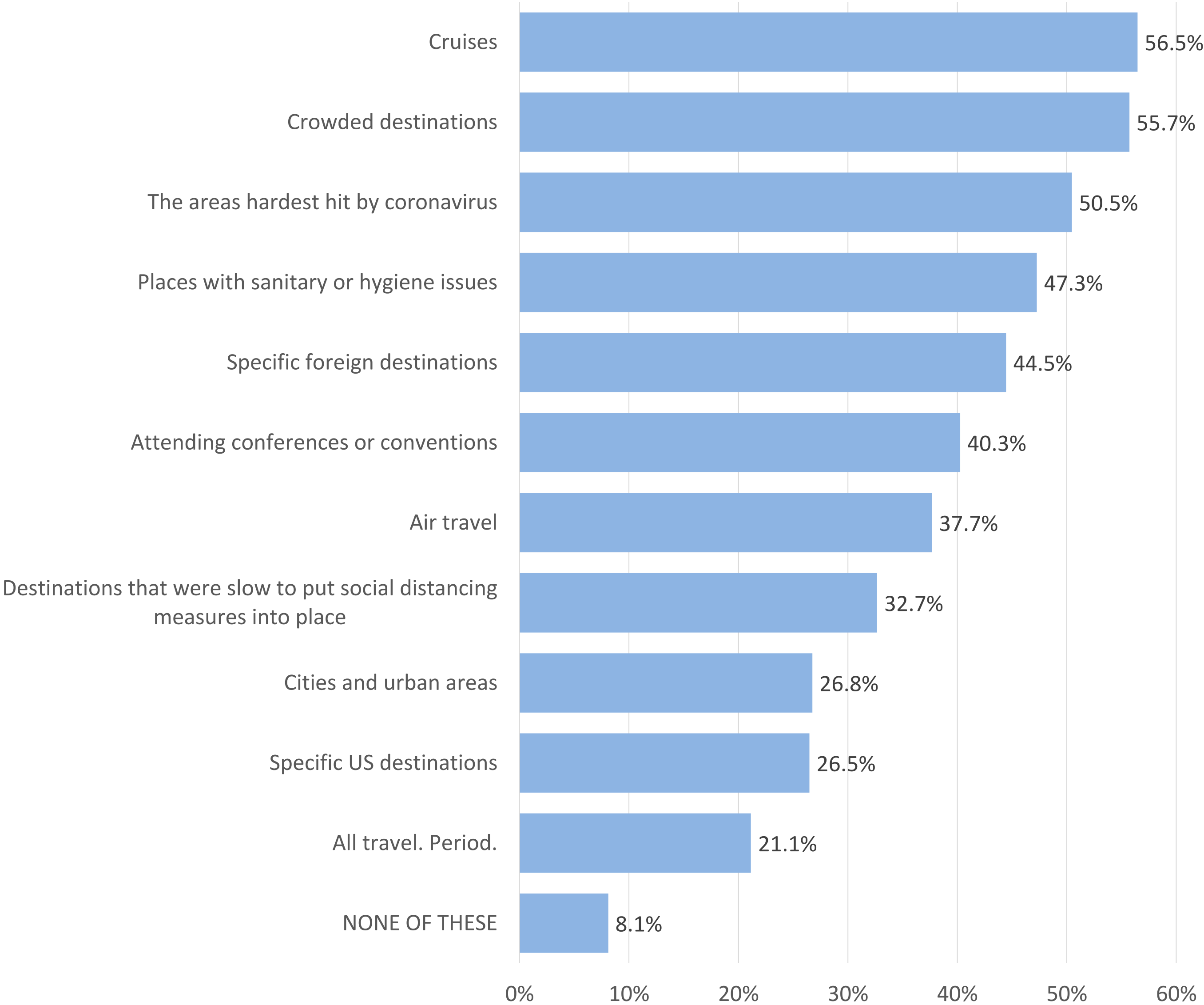
Changes in Travel after the Coronavirus Crisis: Aided

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 _____.

(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 Traveler*™ finds a high baseline level of leisure traveler optimism, yet the unfortunate outbreak of coronavirus will undoubtedly greatly dampen expectations in the near-term. The survey of American leisure travelers was taken in the early stages of the outbreak, before the virus was noted in the United States. The overall outlook at the time of our poll 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](https://twitter.com/DA_Research).

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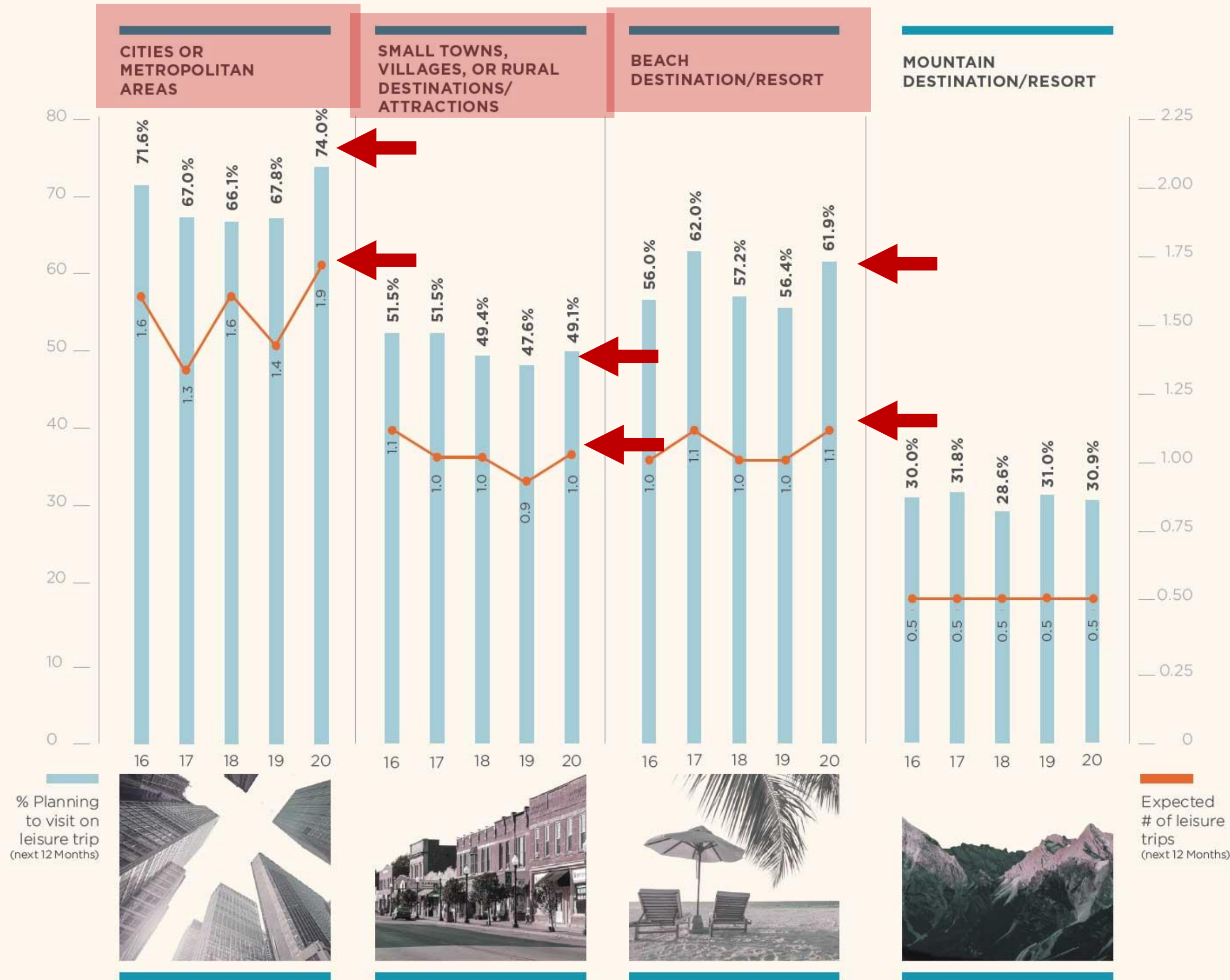
 [@DA_Research](https://twitter.com/DA_Research)

Destinations Edition, January 2020

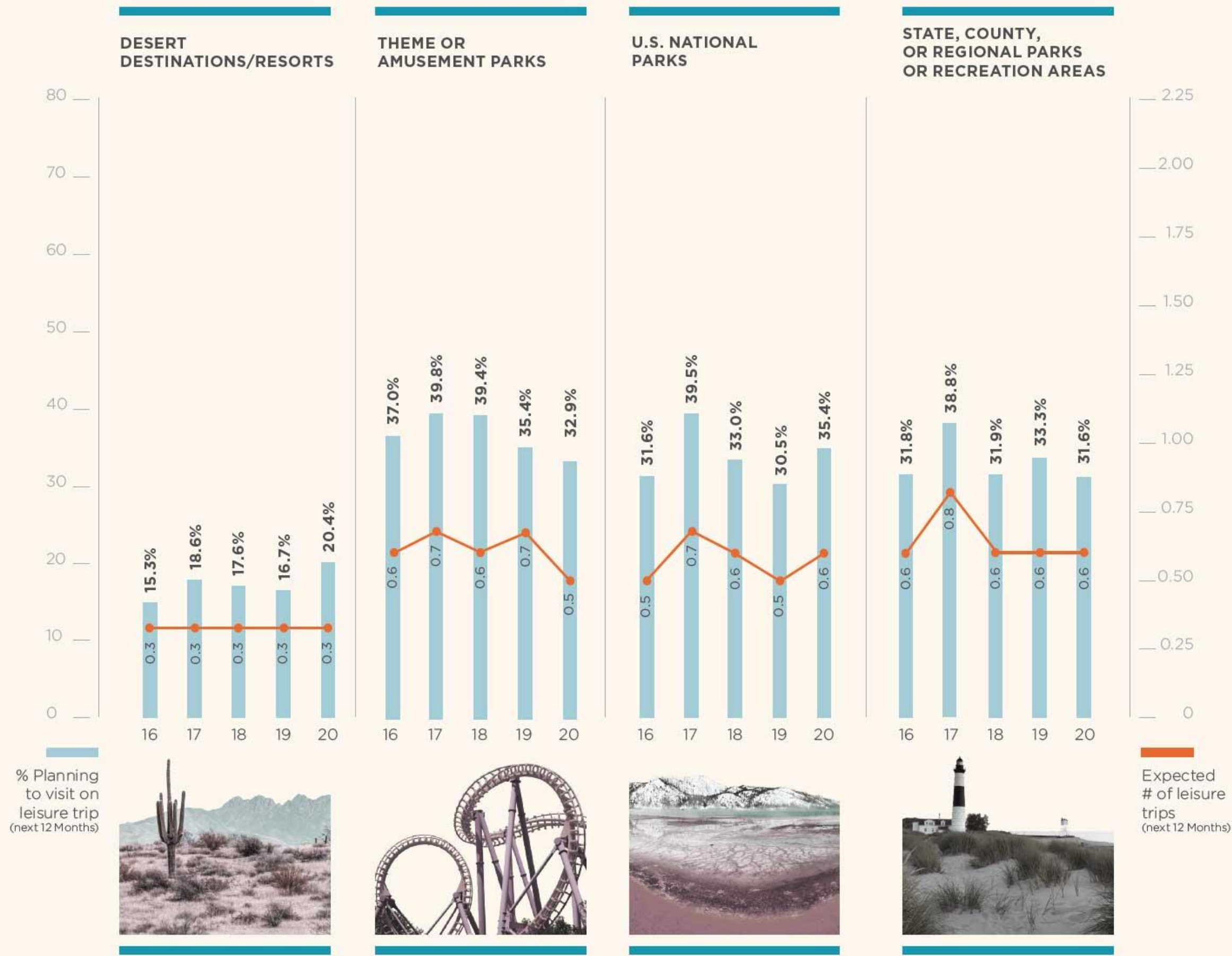
Asked a simple expectations question:

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

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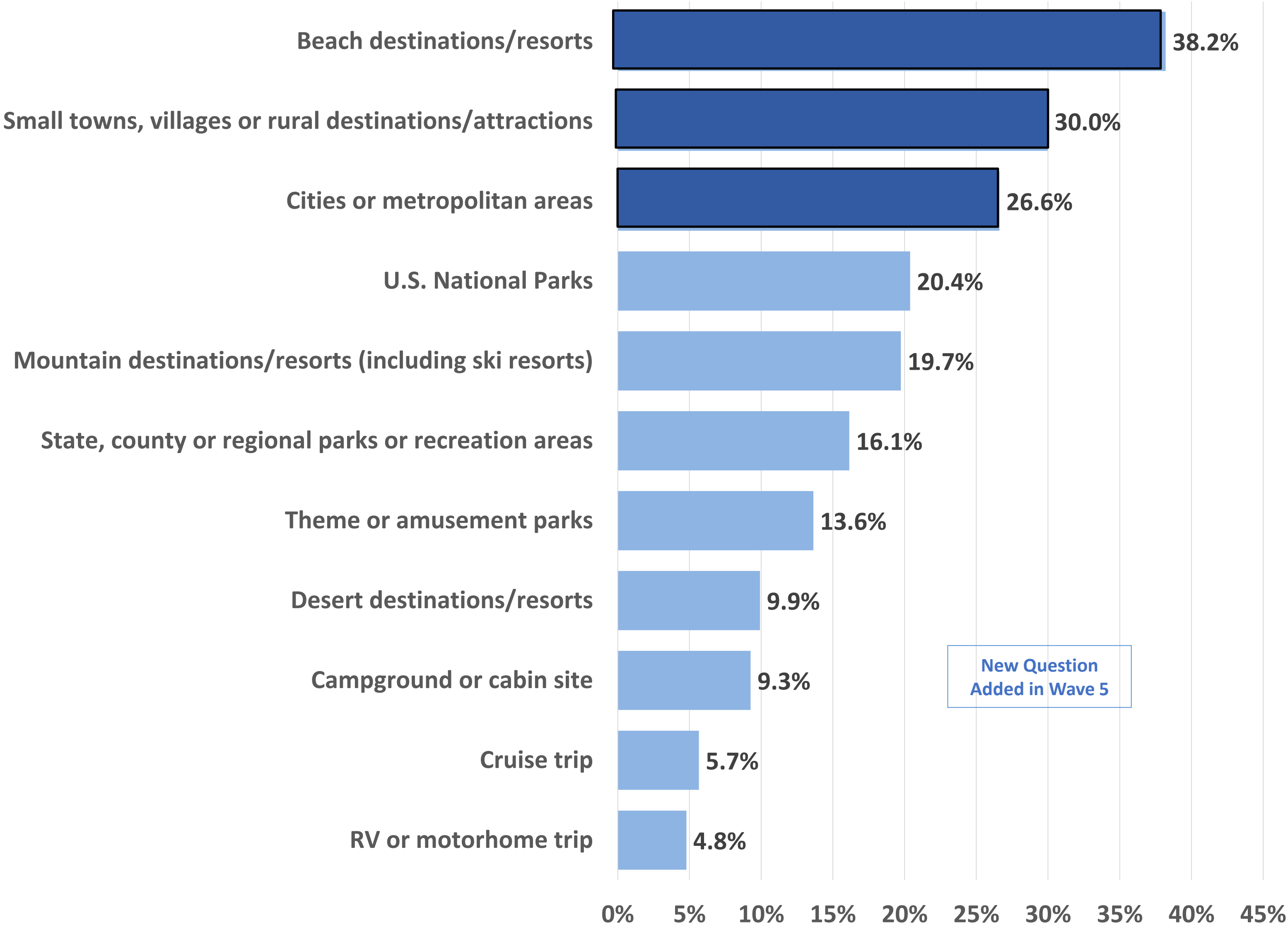


First Trip After the Pandemic

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 & 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

