

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JUNE 1<sup>st</sup>, 2020



# 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.





## IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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<https://destination-analysts-coronavirus-travel-sentiment-index-report.square.site/>

**THANK YOU IN ADVANCE**



A yellow vintage car, possibly a Mini, is parked on a grassy field. The car's roof is heavily loaded with various items, including several suitcases in red, blue, and white, a bicycle, and other travel gear. The background features a large, dark, rocky mountain peak on the right and a line of green trees on the left. The overall scene is bathed in a warm, golden light, suggesting a sunset or sunrise. The image has a slightly desaturated, artistic feel.

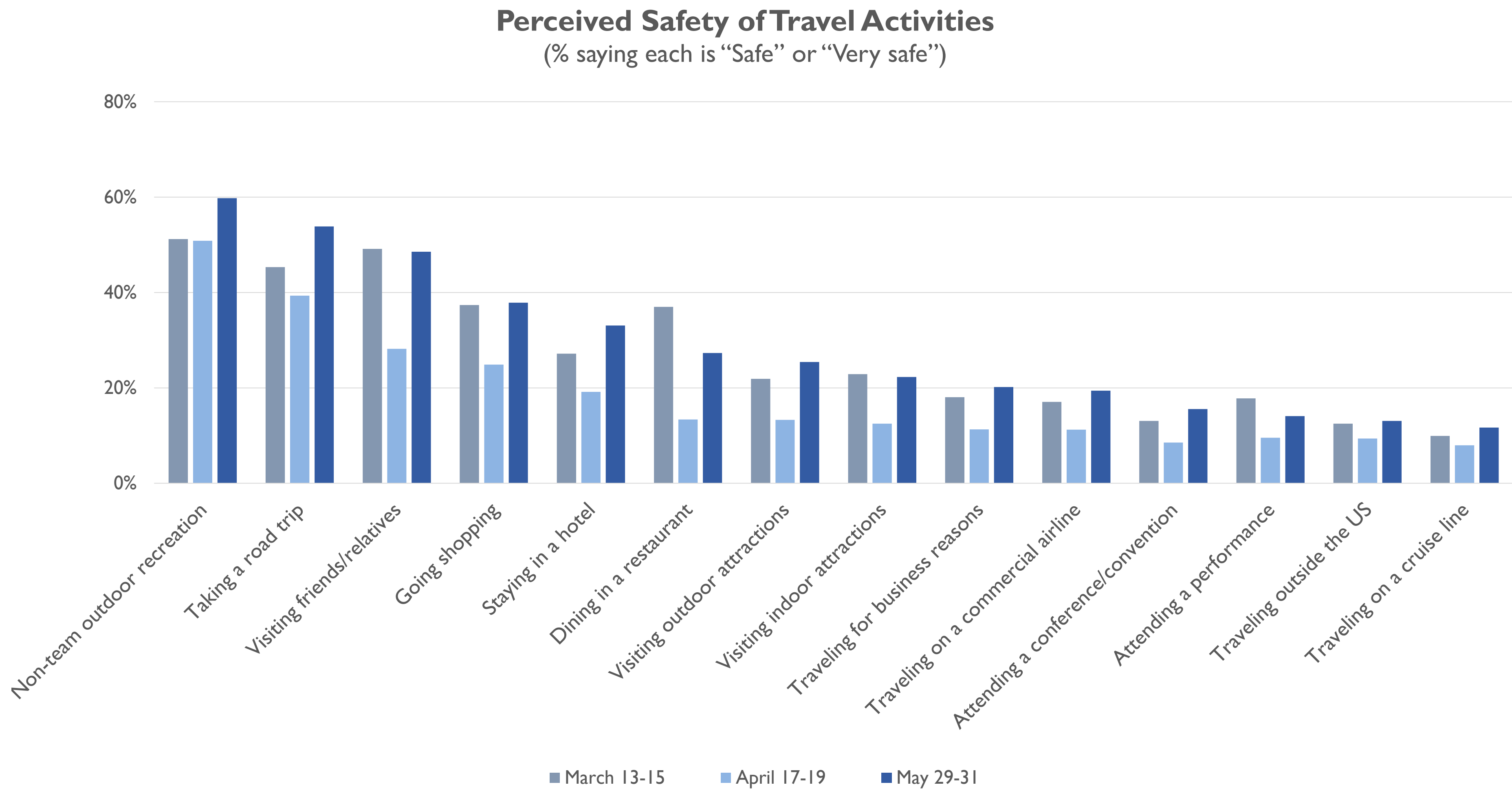
# Key Findings for the Week of June 1<sup>st</sup>

**Please cite Destination Analysts when using or distributing this data**



# Perceived Safety of Travel Activities

Americans continue to exhibit greater feelings of safety, including in their perceptions of travel activities.



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

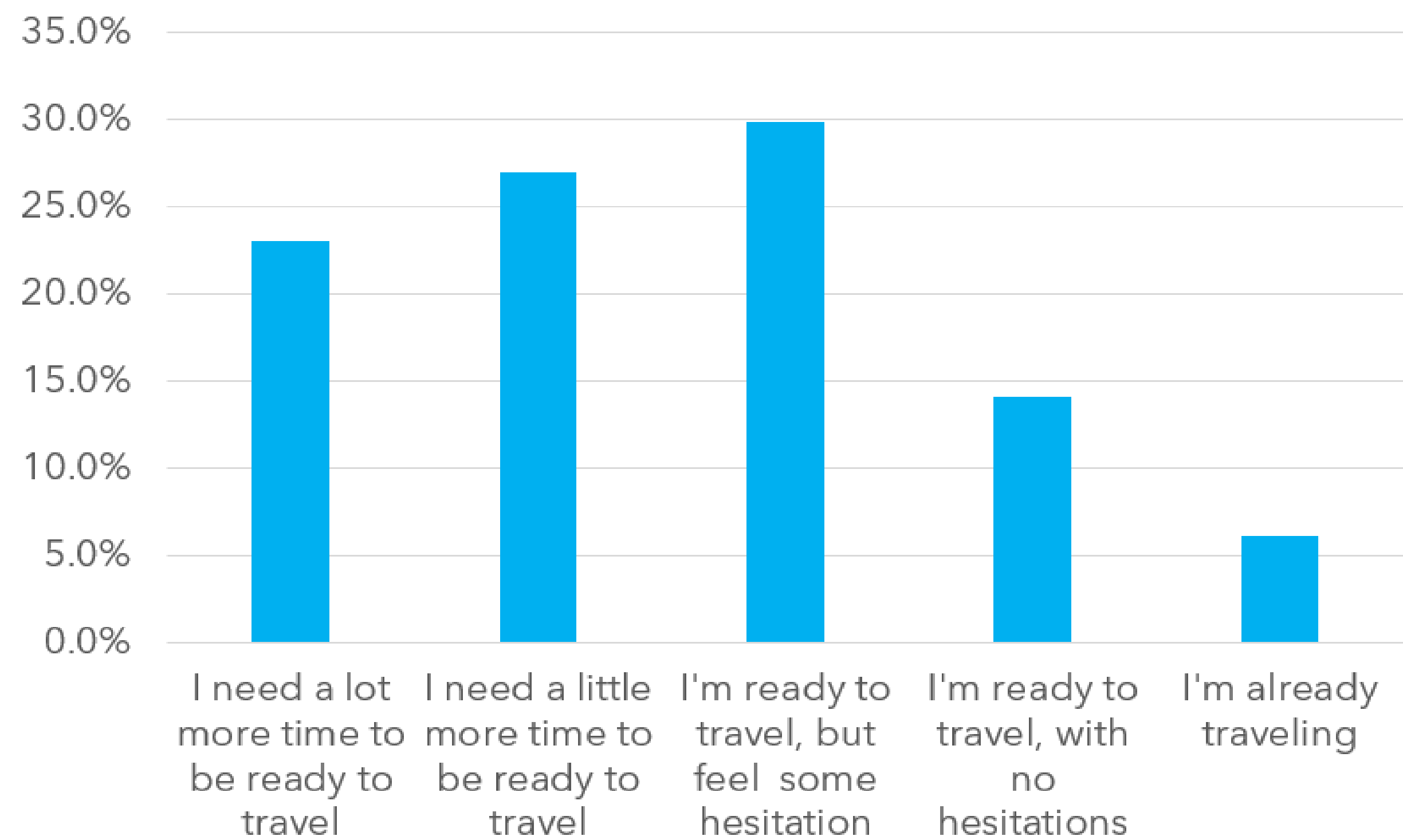
(Base: Waves 1, 6 and 12. 1,201, 1,238 and 1,257 completed surveys. Data collected March 13-15, April 17-19 and May 29-31, 2020)

# Americans' Travel State of Mind

**One-in-five are now already traveling or ready to travel with no hesitations.**

These Americans have less concerns about the impact of the virus and are more optimistic about its course. They are more likely to prioritize having new experiences in their lives and seek joy and relaxation. Conversely, these travelers are less likely to avoid long haul travel and be motivated by a staycation message. They are also more likely to be Caucasian and between 41 and 55 years old (Gen X).

Americans' Travel State of Mind *as of May 31<sup>st</sup>, 2020*



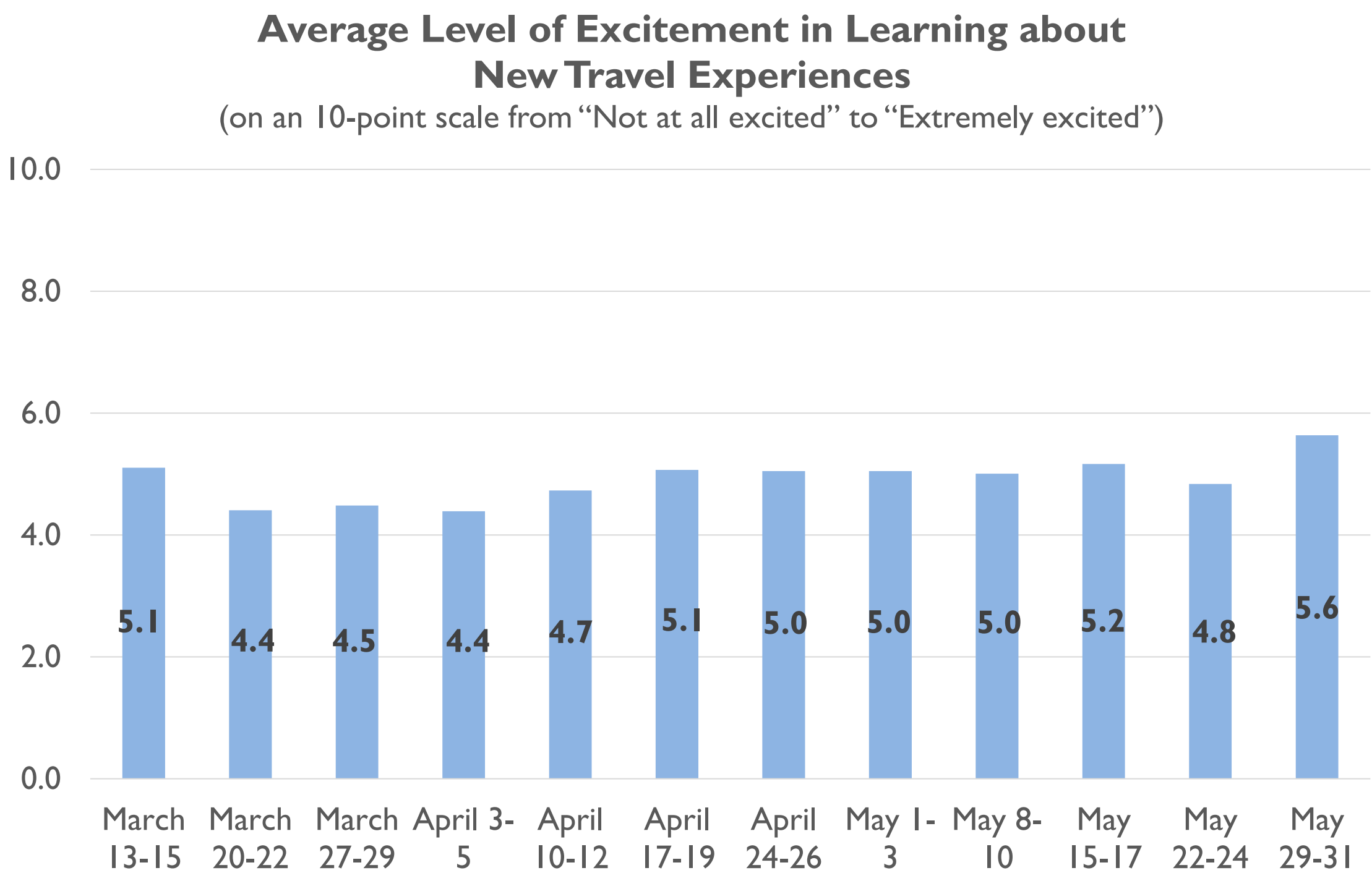
Destination Analysts  
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(Base: All respondents, 1,257 completed surveys. Data collected May 29-31, 2020)

**Question:** When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

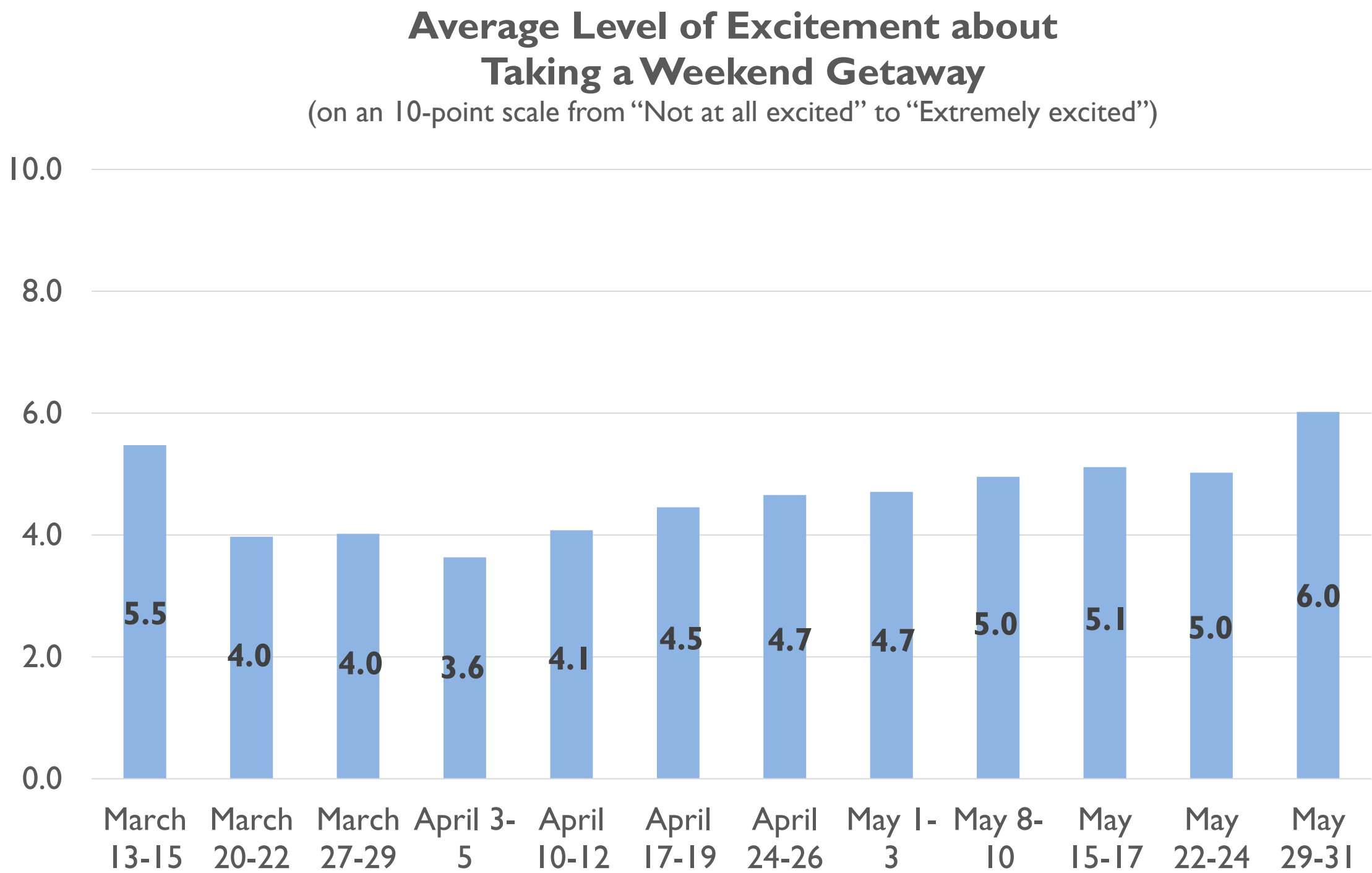
# Openness to Travel Inspiration & Excitement to Take a Getaway

Openness to travel inspiration and excitement to take a getaway in the next month jumped up this week.



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

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



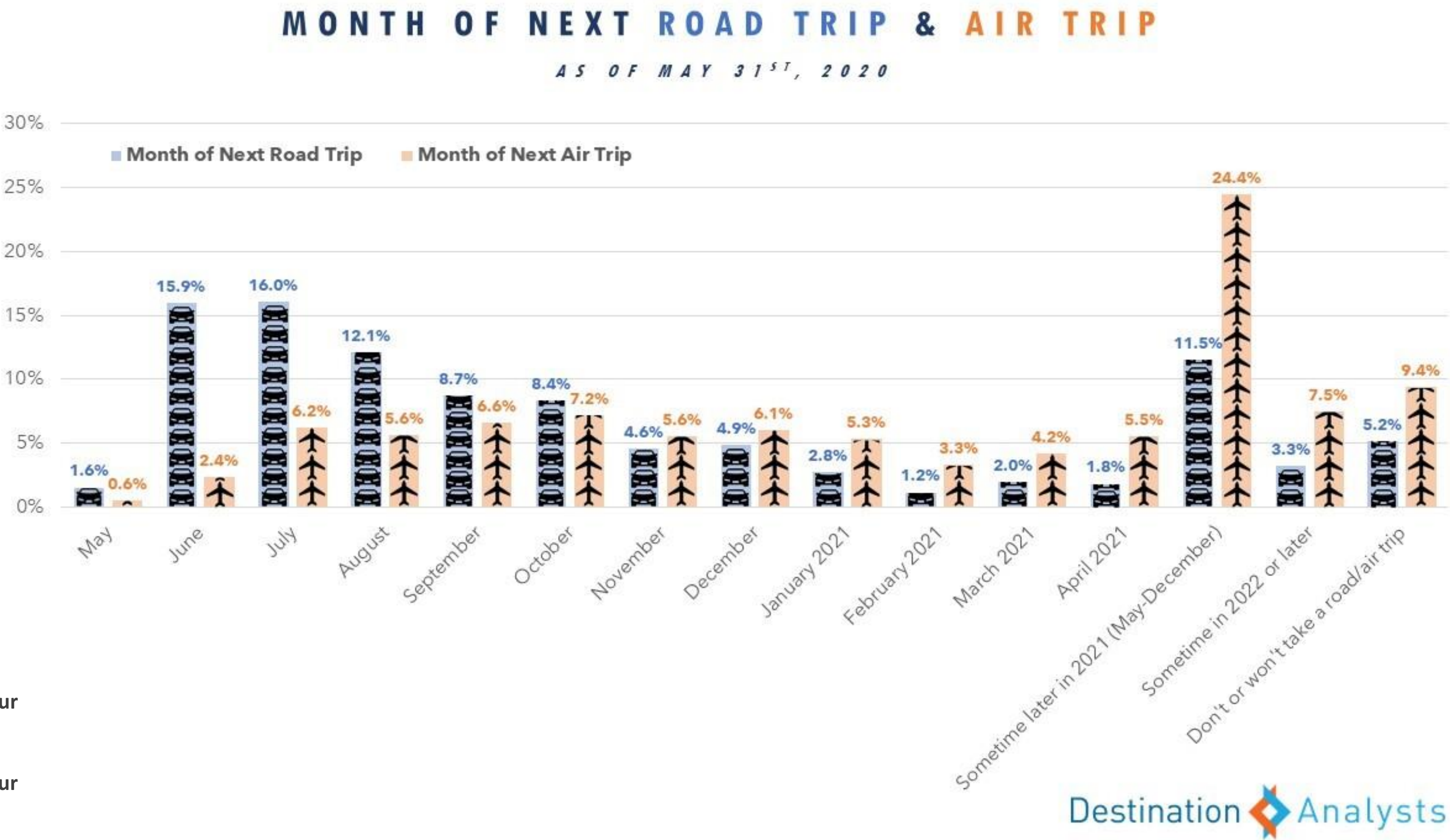
**Question:** Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223 and 1,257 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24 and 29-31, 2020)



# Air and Road Trip Plans

Americans’ next air and road trips will be sooner than they were reporting last week.



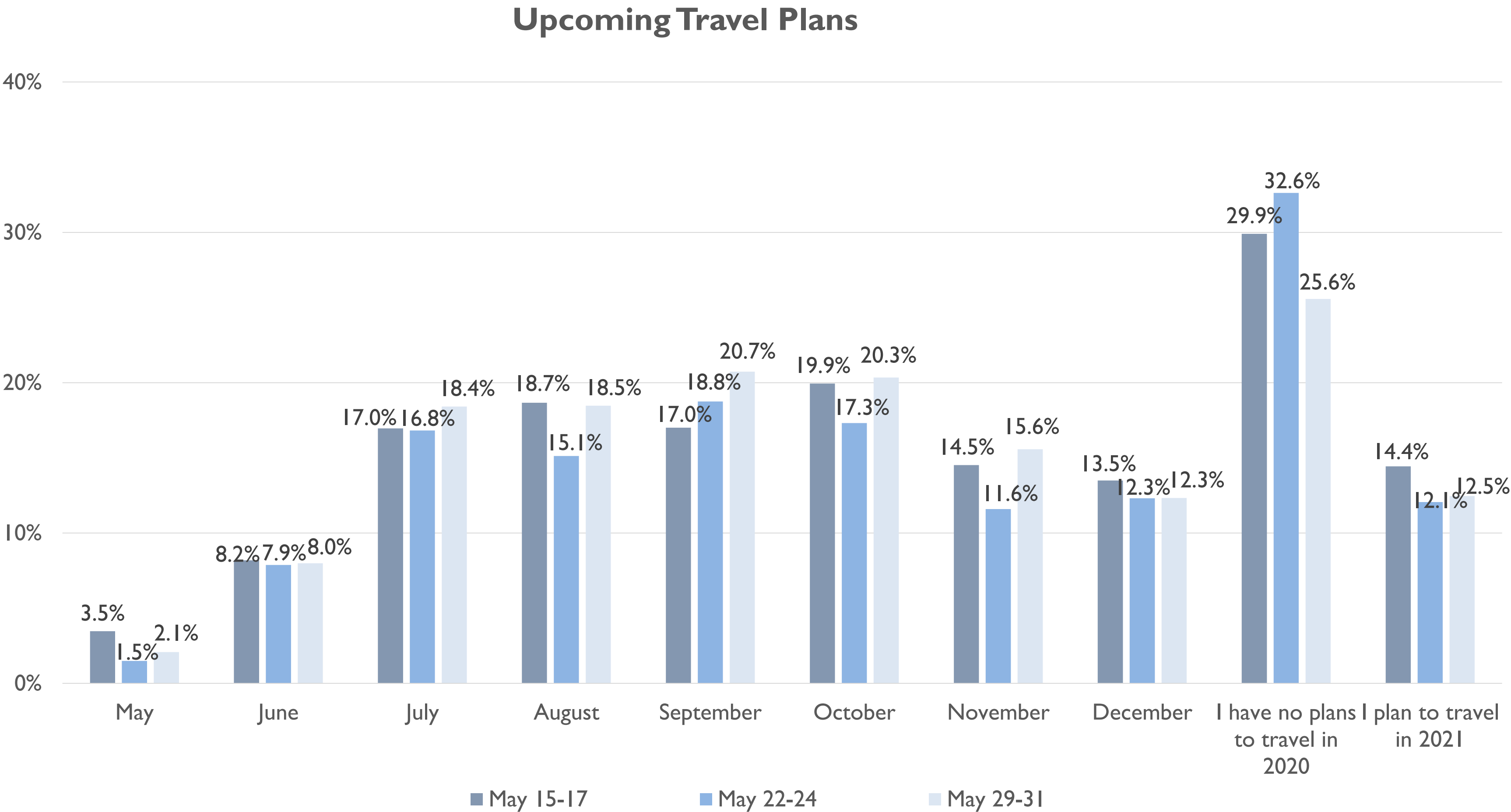
**Question:** In what month do you expect you will take your NEXT TRIP on a commercial airline?

**Question:** In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

(Base: All respondents. 1,257 completed surveys. Data collected May 29-31, 2020)

# Upcoming Travel Plans

The proportion of American travelers who have at least tentative trip plans in 2020 grew to nearly 70 percent, and the months of July through November saw increases in the percent of travelers reporting they have plans in them.



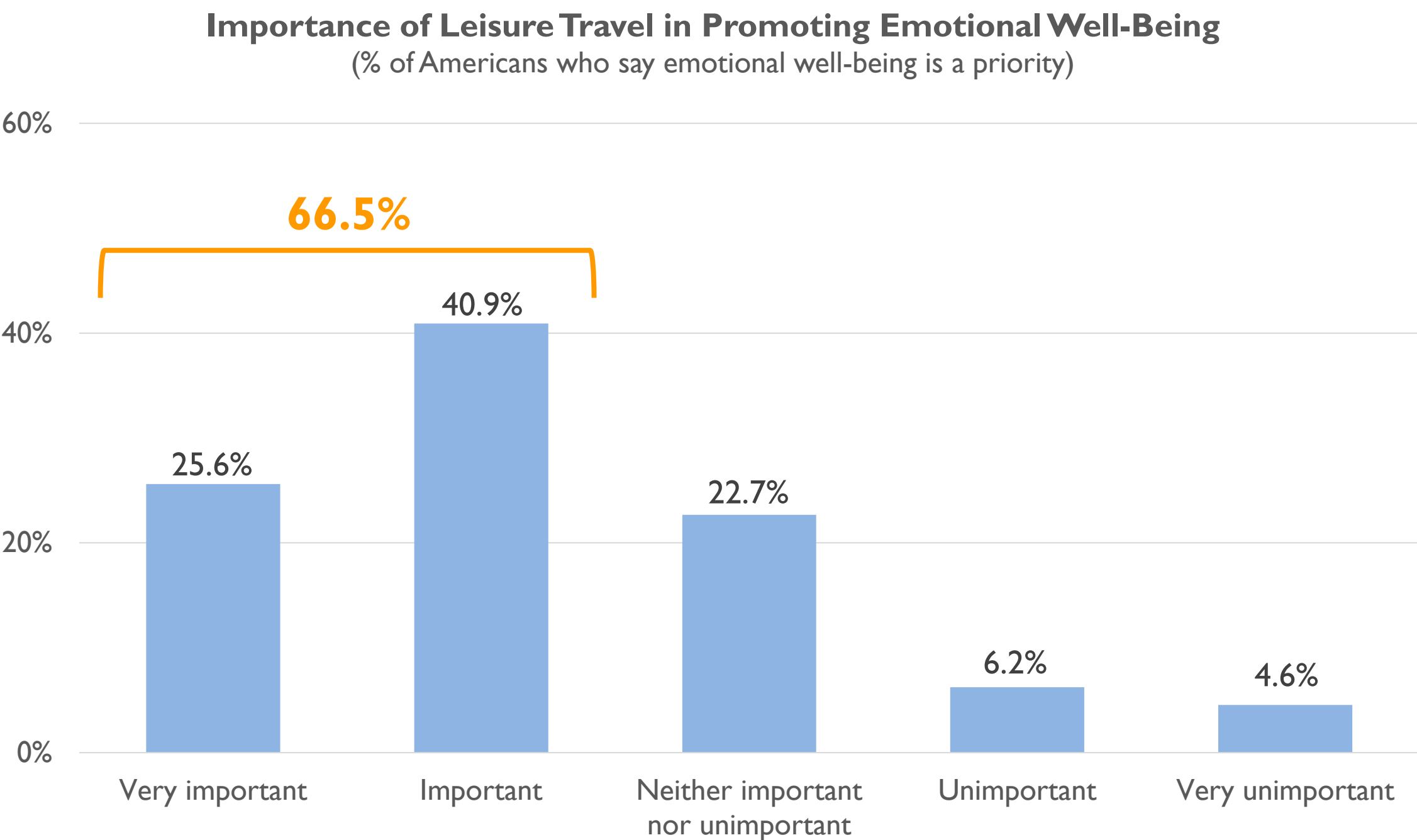
**Question:** Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

(Base: Waves 10-12. 1,212, 1,223 and 1,257 completed surveys. Data collected May 15-17, 22-24 and 29-31, 2020)



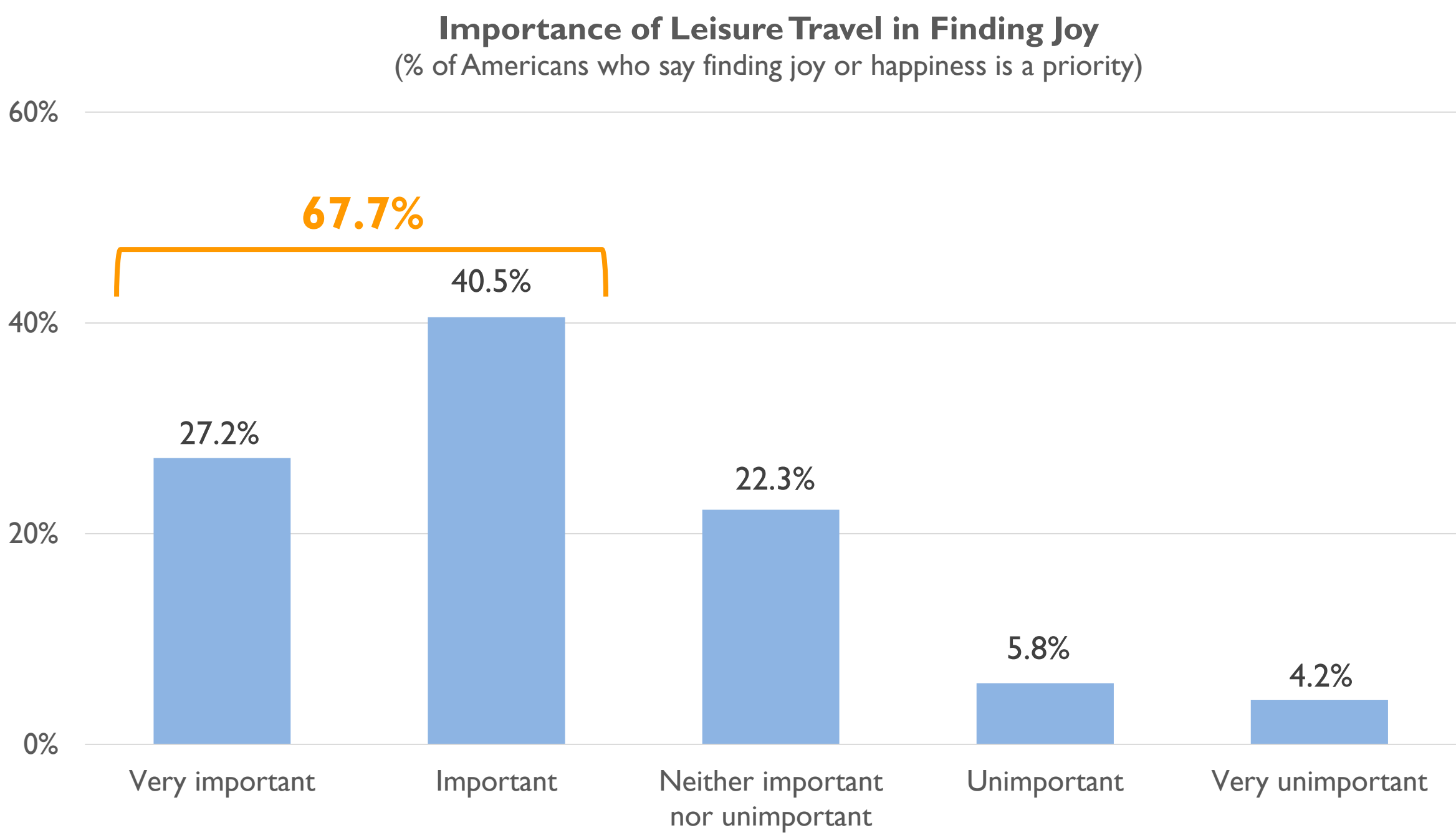
# Travel’s Importance to Emotional Well-Being and Joy

**What’s motivating the return to travel? It appears that travel is commonly seen as integral to health and wellness, with two-thirds of those prioritizing their emotional well-being and finding joy in their lives saying that leisure travel will be important in helping them do so.**



**Question:** You said above that your "Emotional Well-being" will be a priority in the next year. How important do you expect leisure travel will be in promoting you emotional well-being?

*(Base: Respondents seeking emotional well-being, 1,171 completed surveys. Data collected May 29-31, 2020)*



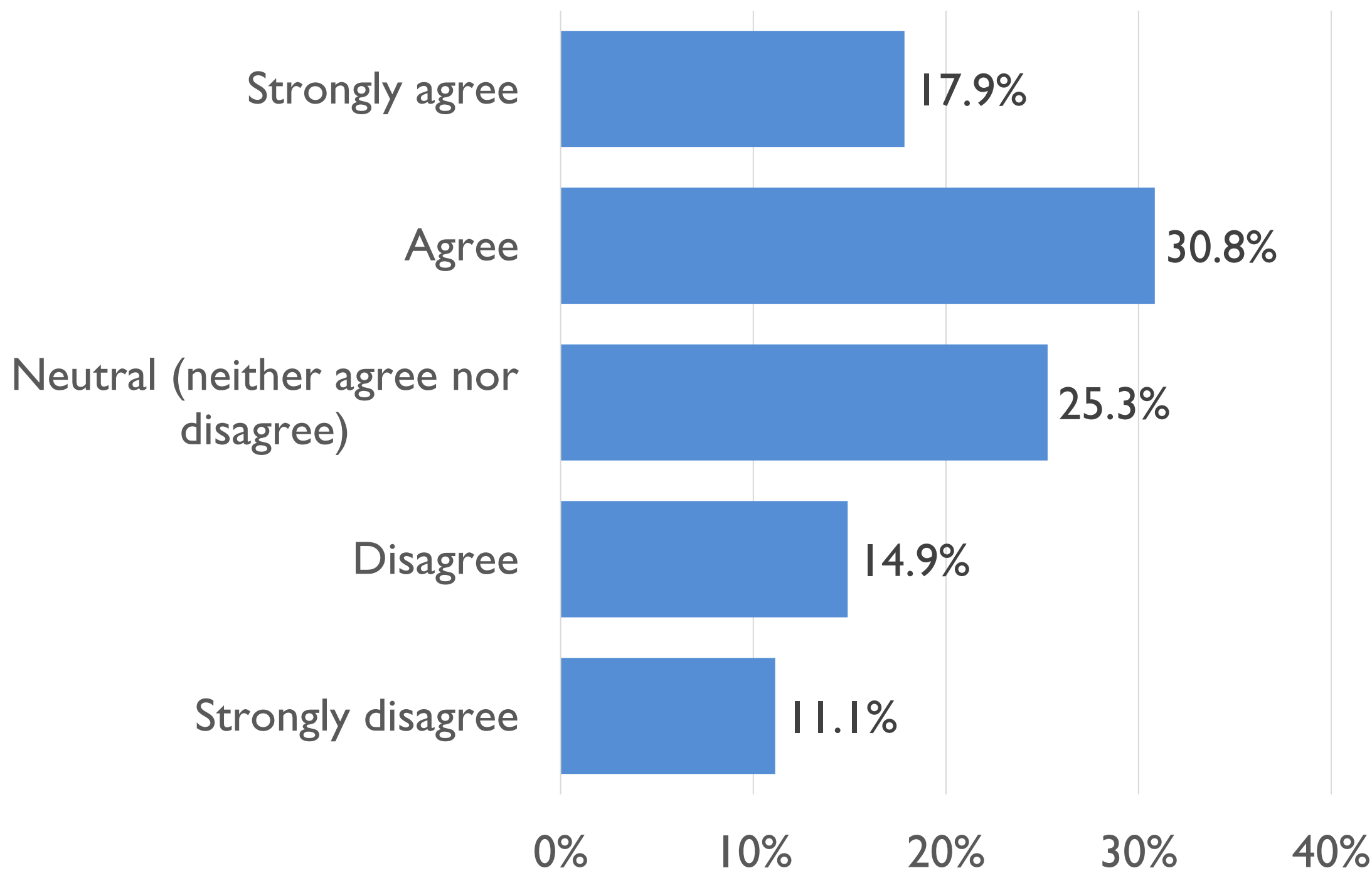
**Question:** You said above that your "Finding Joy or happiness" will be a priority in the next year. How important do you expect leisure travel will be in helping you find joy or happiness?

*(Base: Respondents seeking joy/happiness, 1,177 completed surveys. Data collected May 29-31, 2020)*

# Travel's Role in Stress Management

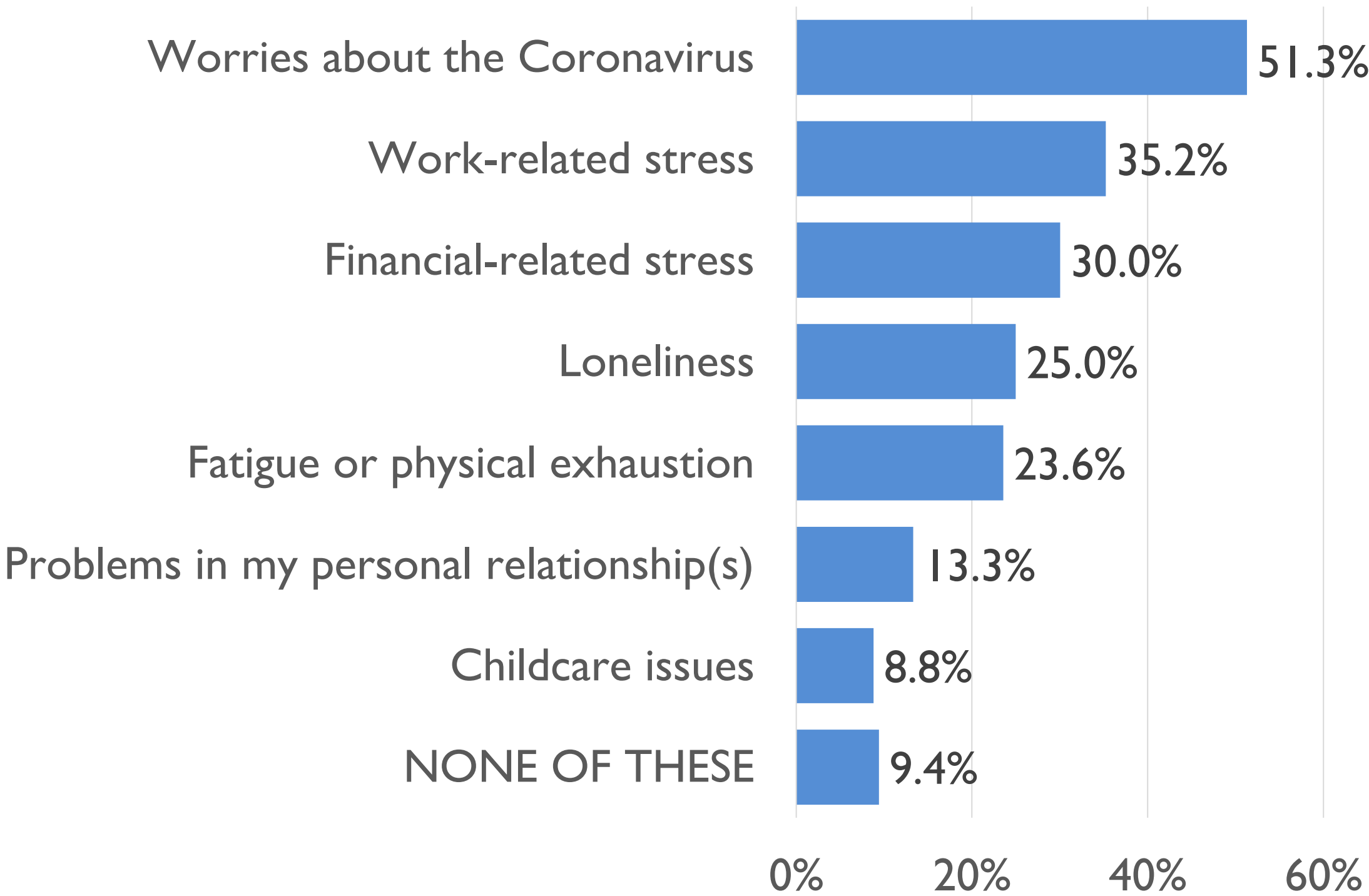
The majority of Americans who are prioritizing their stress management think that vacations are a good way to do so (48.7%). What's stressing them out? Worries about coronavirus first, then work and their finances.

Agreement that a Vacation will Help Manage Stress in Life



**Question:** How much do you agree with this statement?  
**Statement:** In the current environment, taking a vacation would help me manage the stress in my life.

Types of Stress Hoping to Reduce

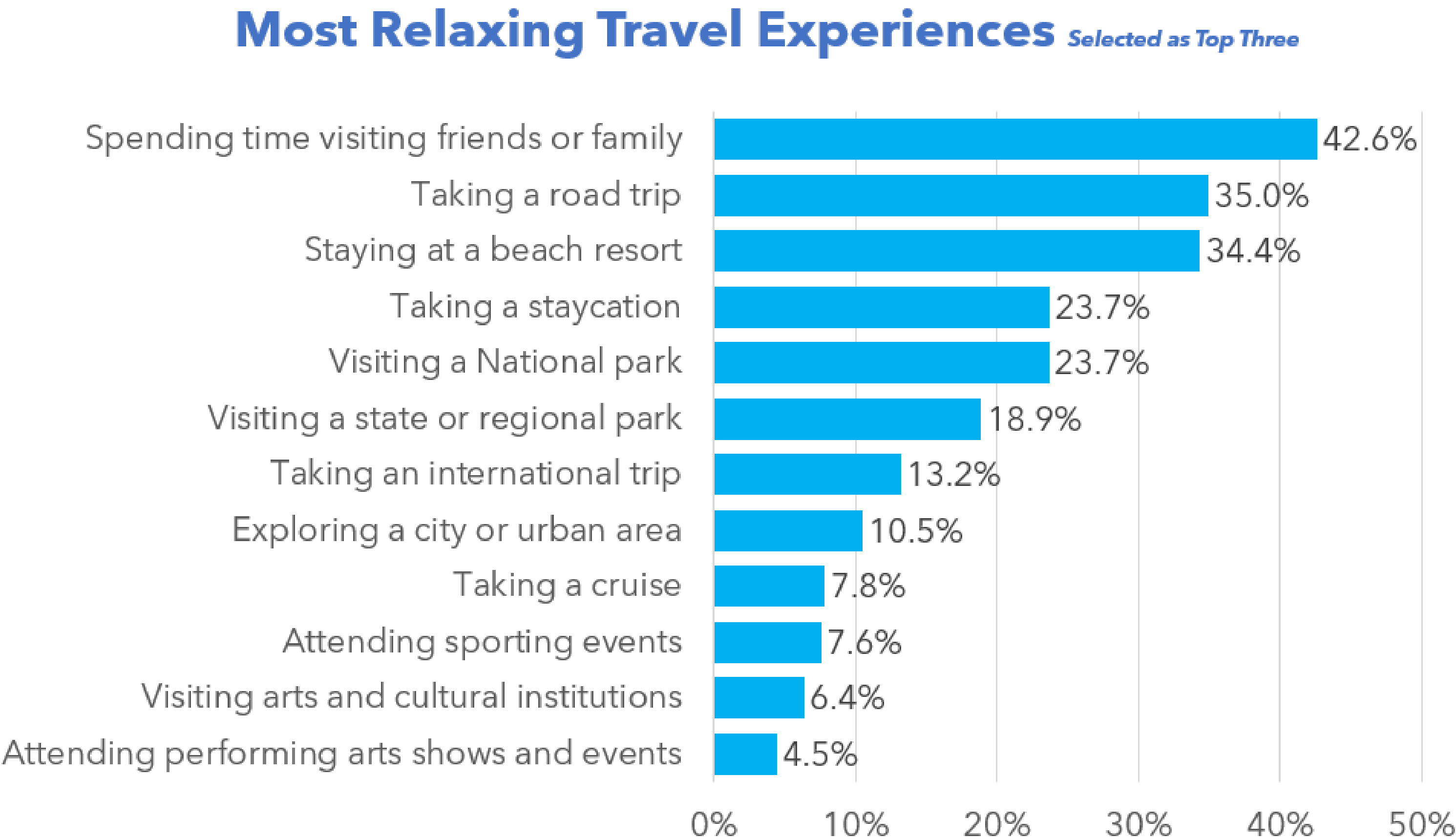


**Question:** You said earlier that "Escape from stress" will be a priority in your life this year. Which of types of stress are you hoping to reduce? (Select all that apply)



# Most Relaxing Travel Experiences

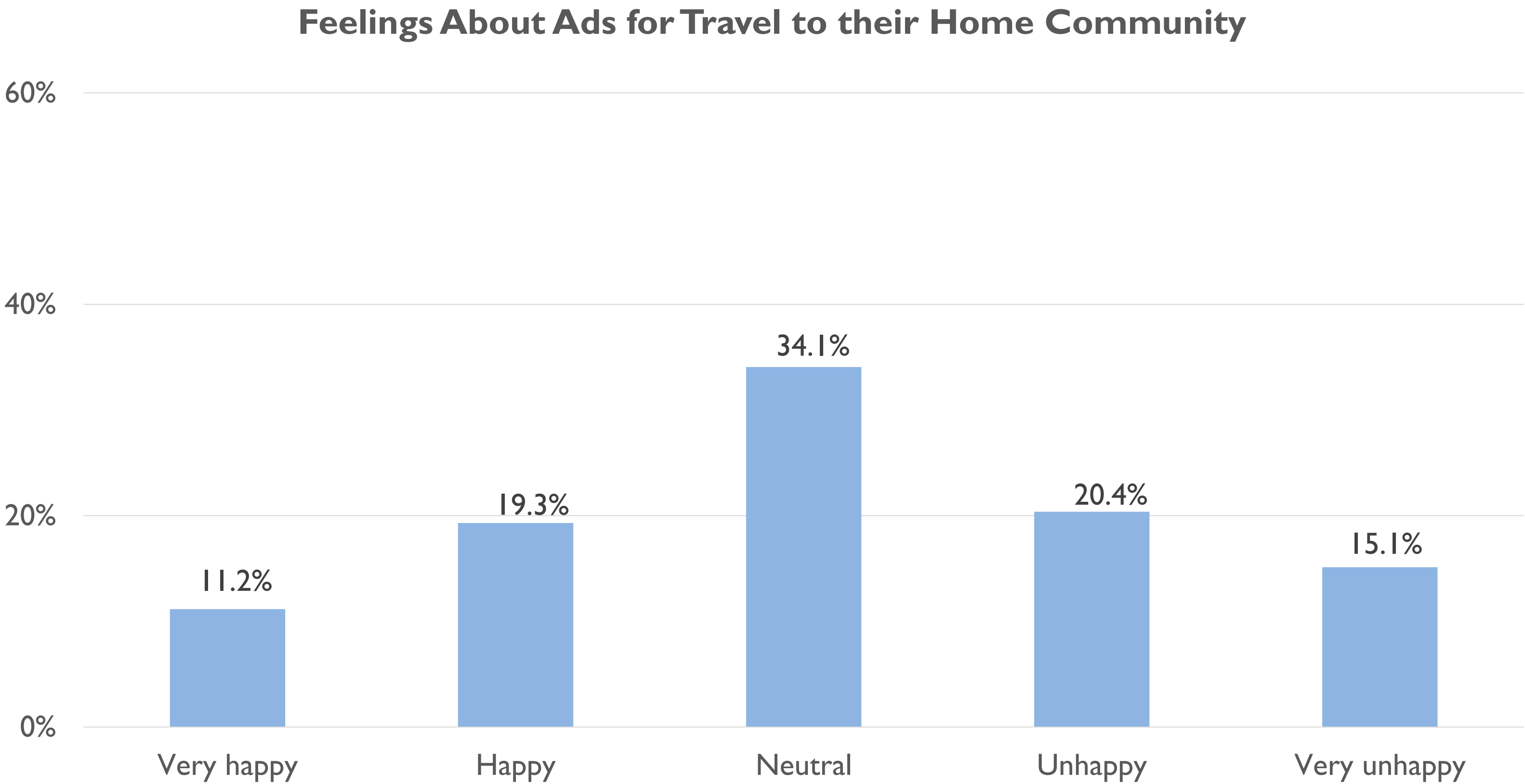
After spending time with friends and family, road trips, staying at a beach resort, and visiting national and other parks are among the highest rated relaxing travel experiences.



Question: In the next TWELVE (12) MONTHS, which of types of travel experiences would you find most relaxing? (Select at most 3)

# Feelings About Advertisements for Travel to their Home Communities

**Not only are American travelers feeling safer going out in their own communities, they are also getting more comfortable with tourists in town.** Three-in-ten even say they would be happy to see an advertisement promoting their community as a place for tourism.



**Question:** How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe? (Select one)

*(Base: All respondents. 1,257 completed surveys. Data collected May 29-31, 2020)*





# Coronavirus Travel Sentiment Index

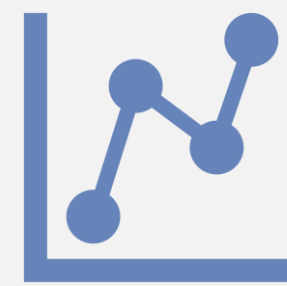
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of June 1st

# What is a Predictive Index?



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



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

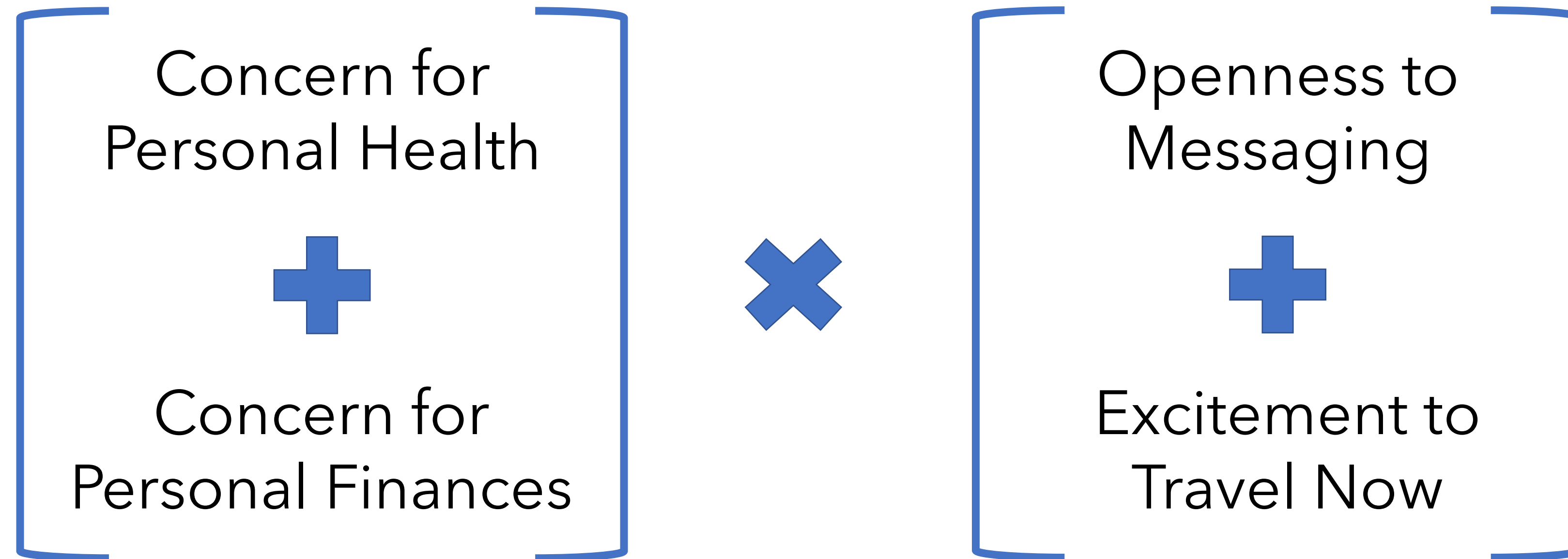


The goals are to identify:

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

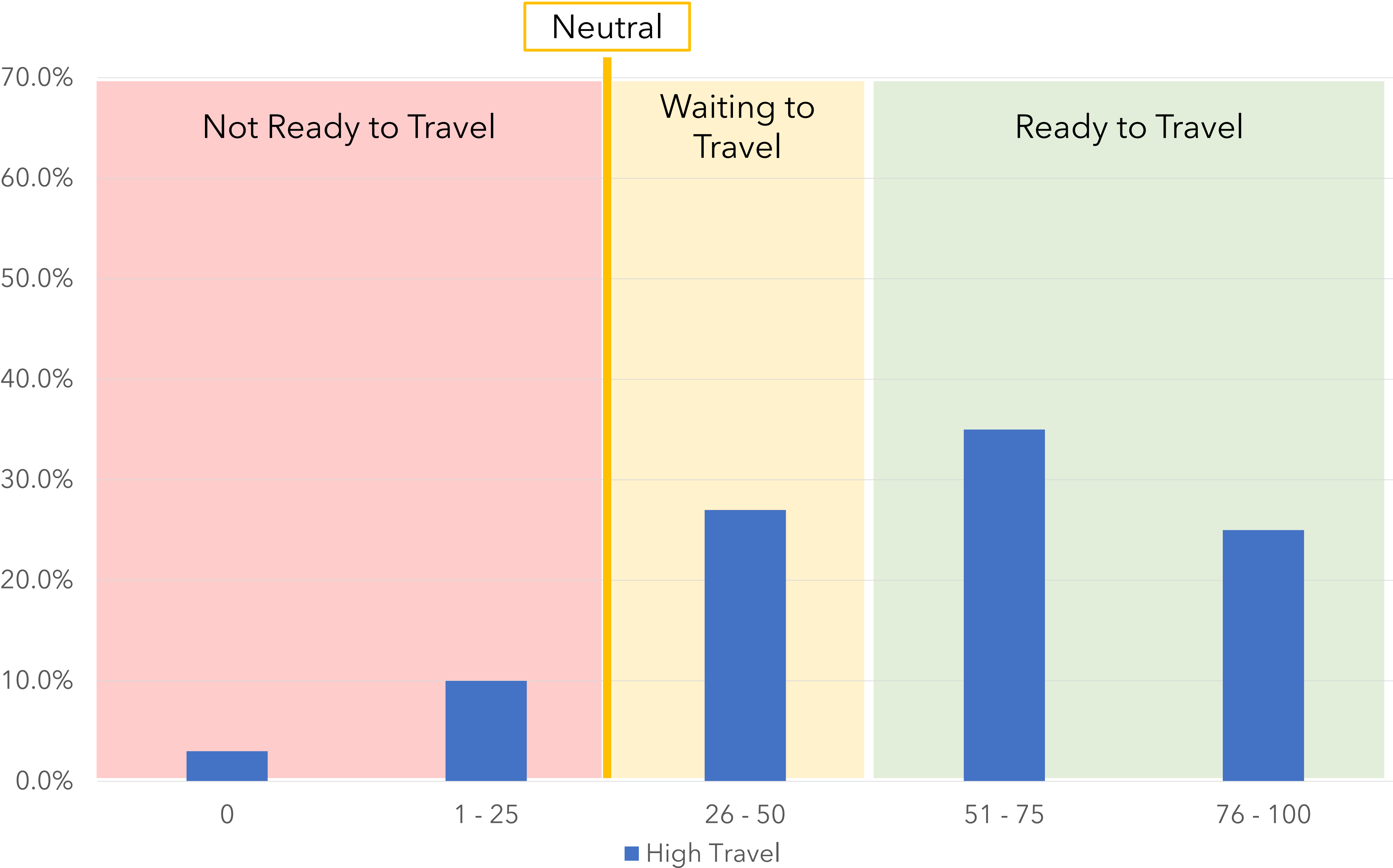


# Predictive Index Formula



\*Normalized to a 100pt scale

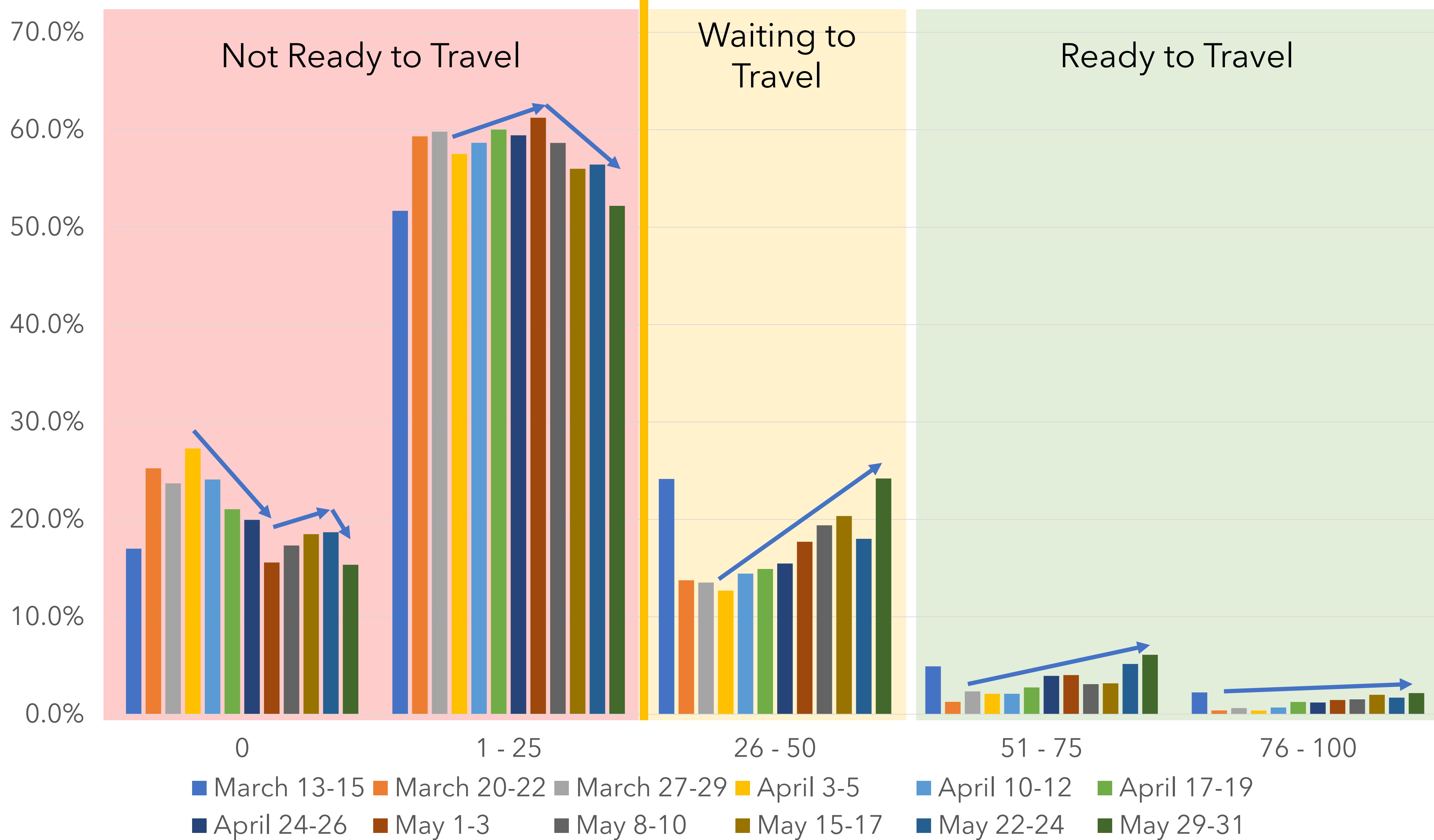
# Healthy Travel Outlook

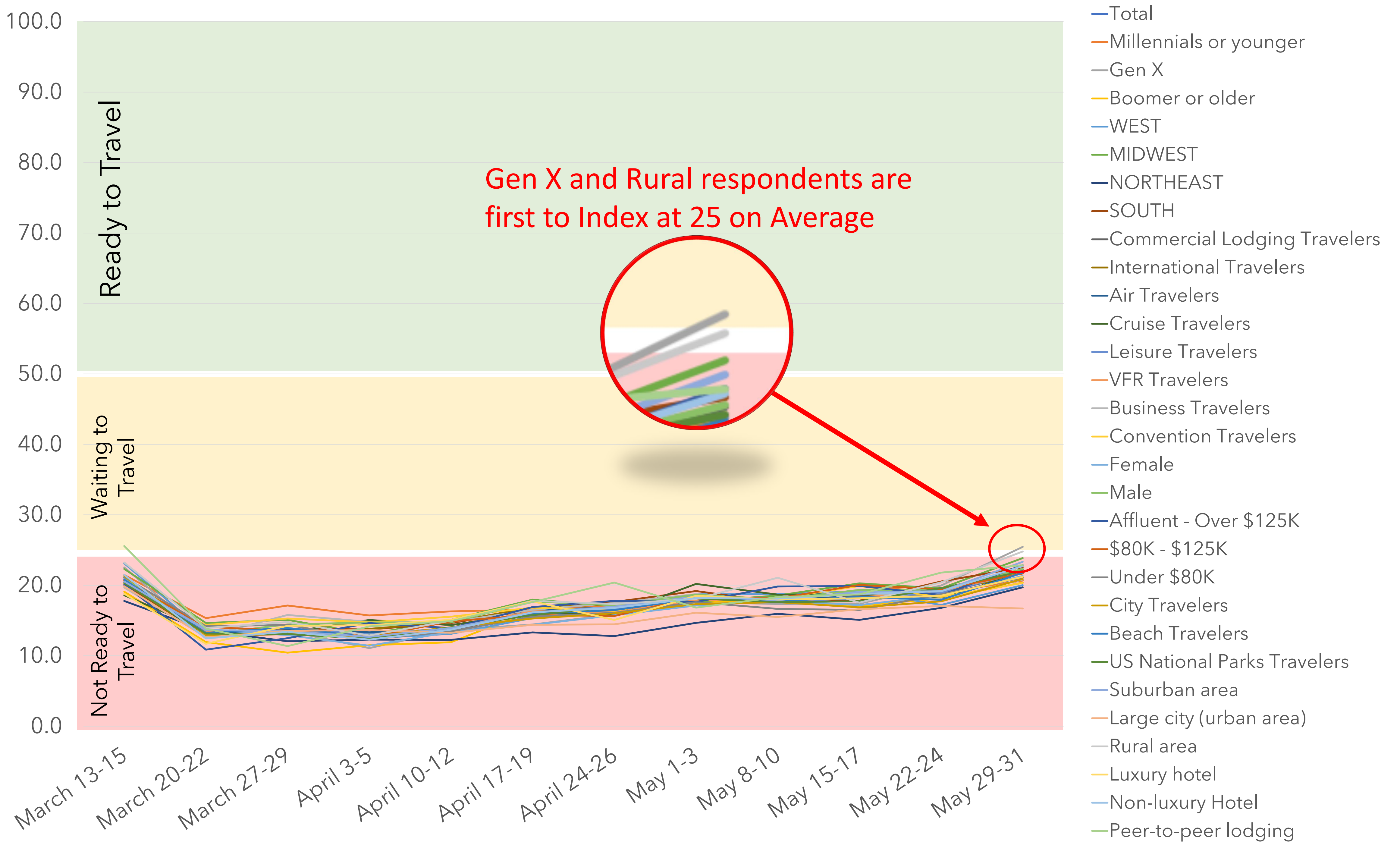




# Travel Outlook

Neutral



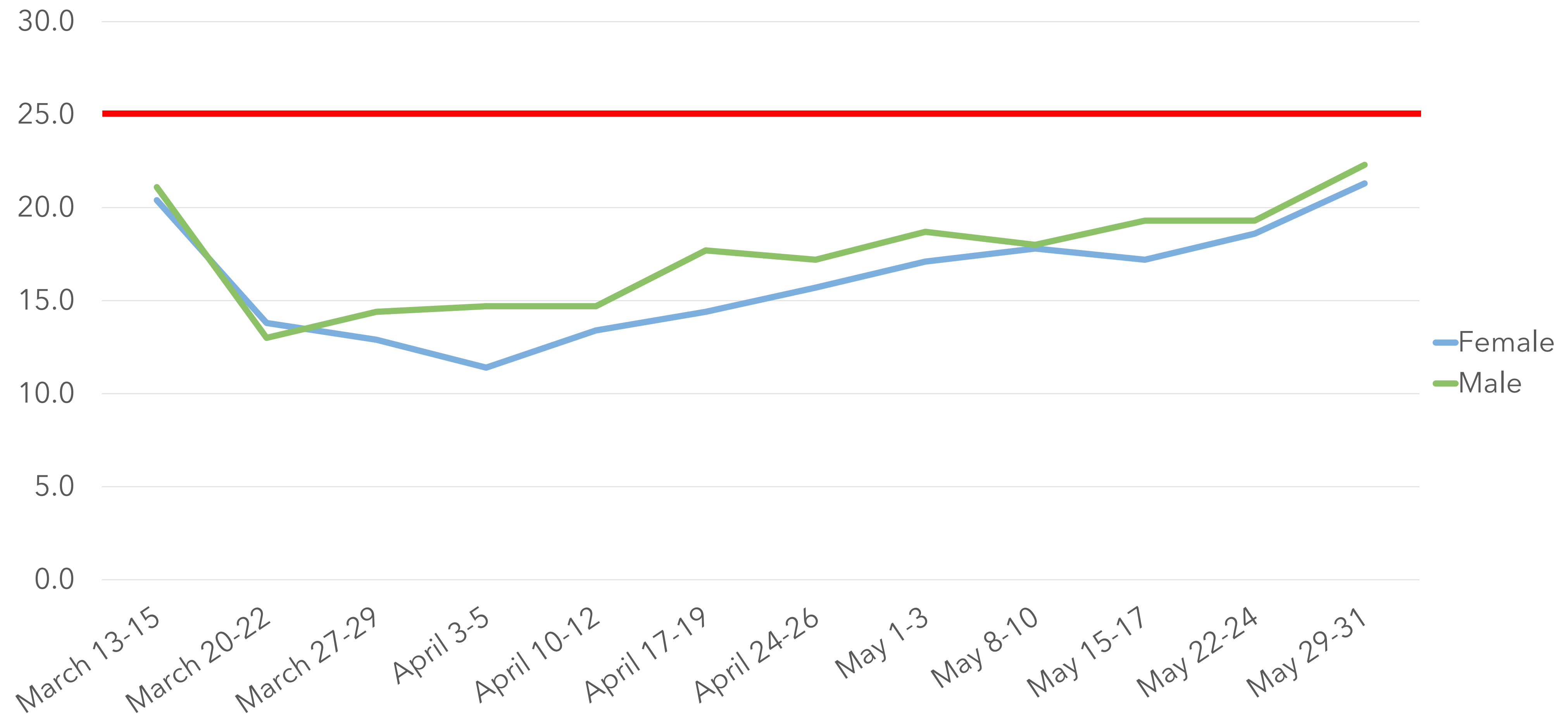




# Gender

## Points of Interest:

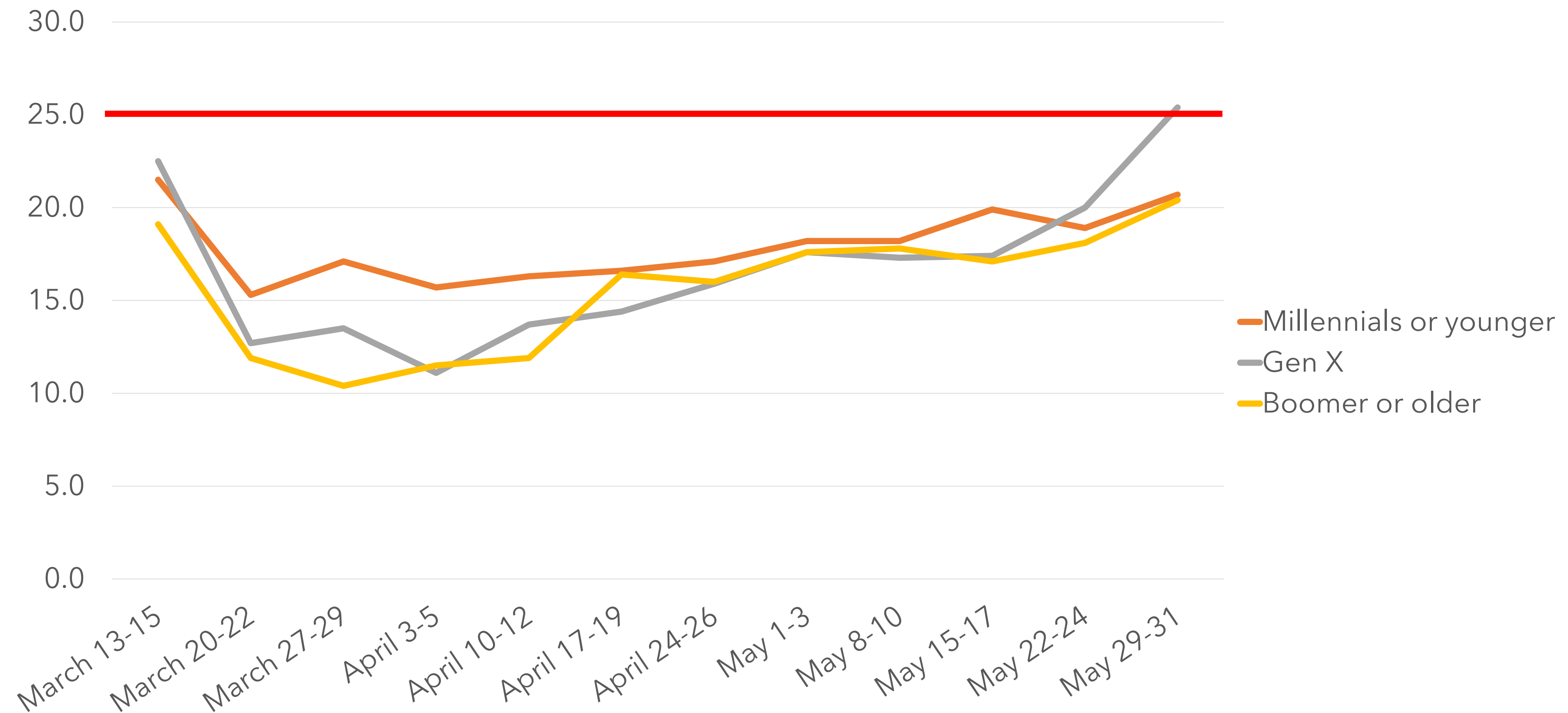
- Safety concerns for both Men and Women stayed the same this week, while financial concerns dropped for both groups, more significantly for Men.
- Less than a third of women this week said they have no plans to travel in 2020 (29.5% down from 35.2%) while only a fifth of men (21.1% down from 28.8%) said the same.



# Generation

## Points of Interest:

- While safety concerns for Millennials and Boomers grew slightly this week, Gen X showed a relatively dramatic drop in safety concerns (6.1 out of 10, down from 6.9 just two weeks ago).
- All generations show an increase in excitement to travel and openness to messaging, and most significant growth was among Gen X this week.

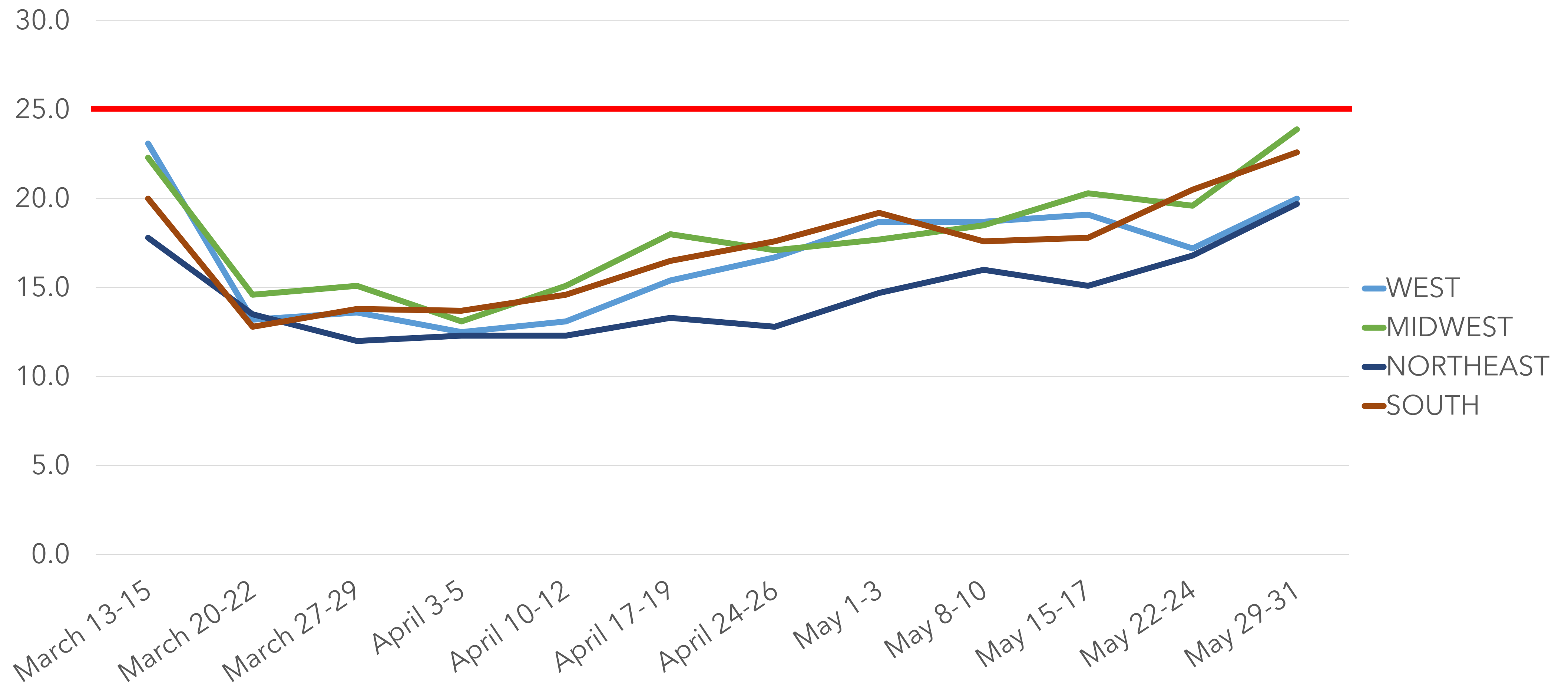




# US Region

## Points of Interest:

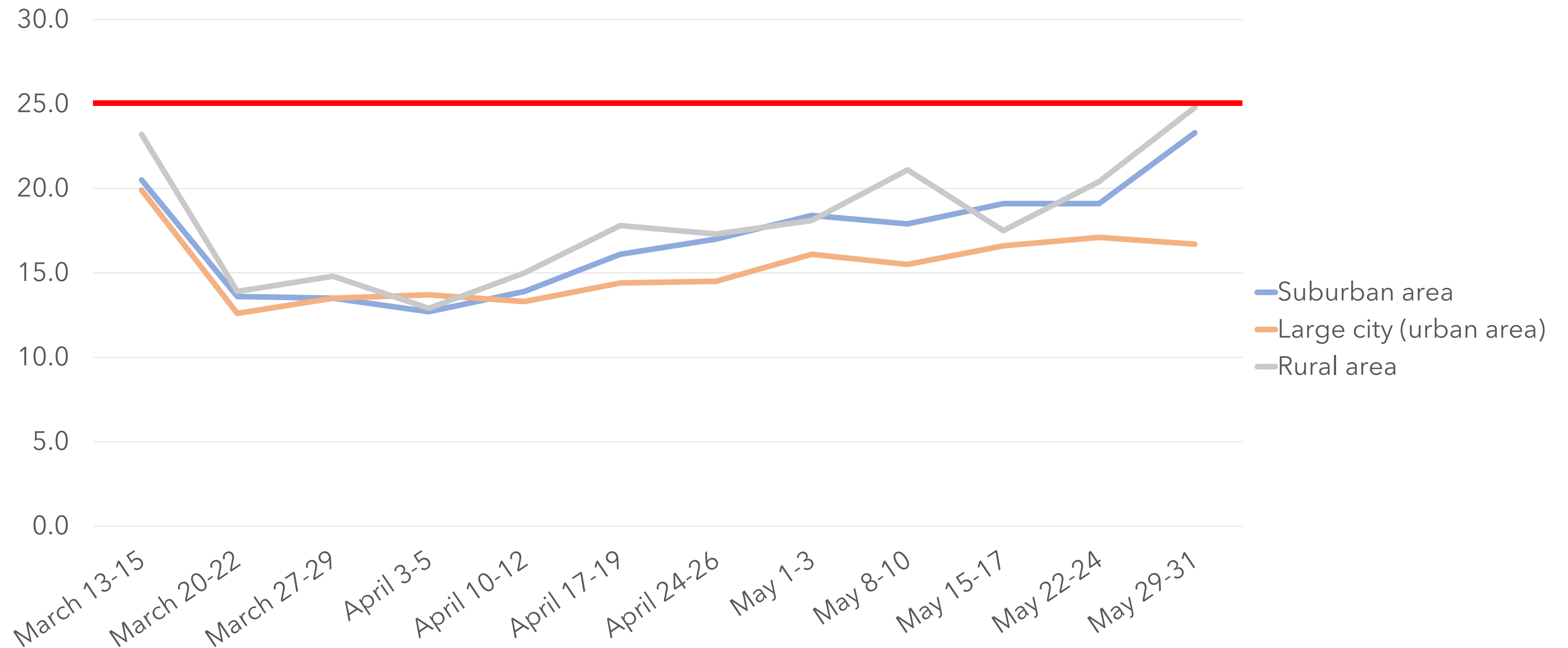
- Safety concerns in all regions except the Northeast showed slight drops this week while financial concerns showed drops most significantly in the Midwest.
- Among all regions, the Northeast showed the most optimism about the coronavirus situation improving in the next month.



# Type Of Residence

## Points of Interest Impacting Index Scores:

- Safety concerns grew again among Urban respondents this week while showing drops for Suburban and Rural respondents.
- Rural respondents reported being the most excited to travel and Suburban reported being the most open to messaging.

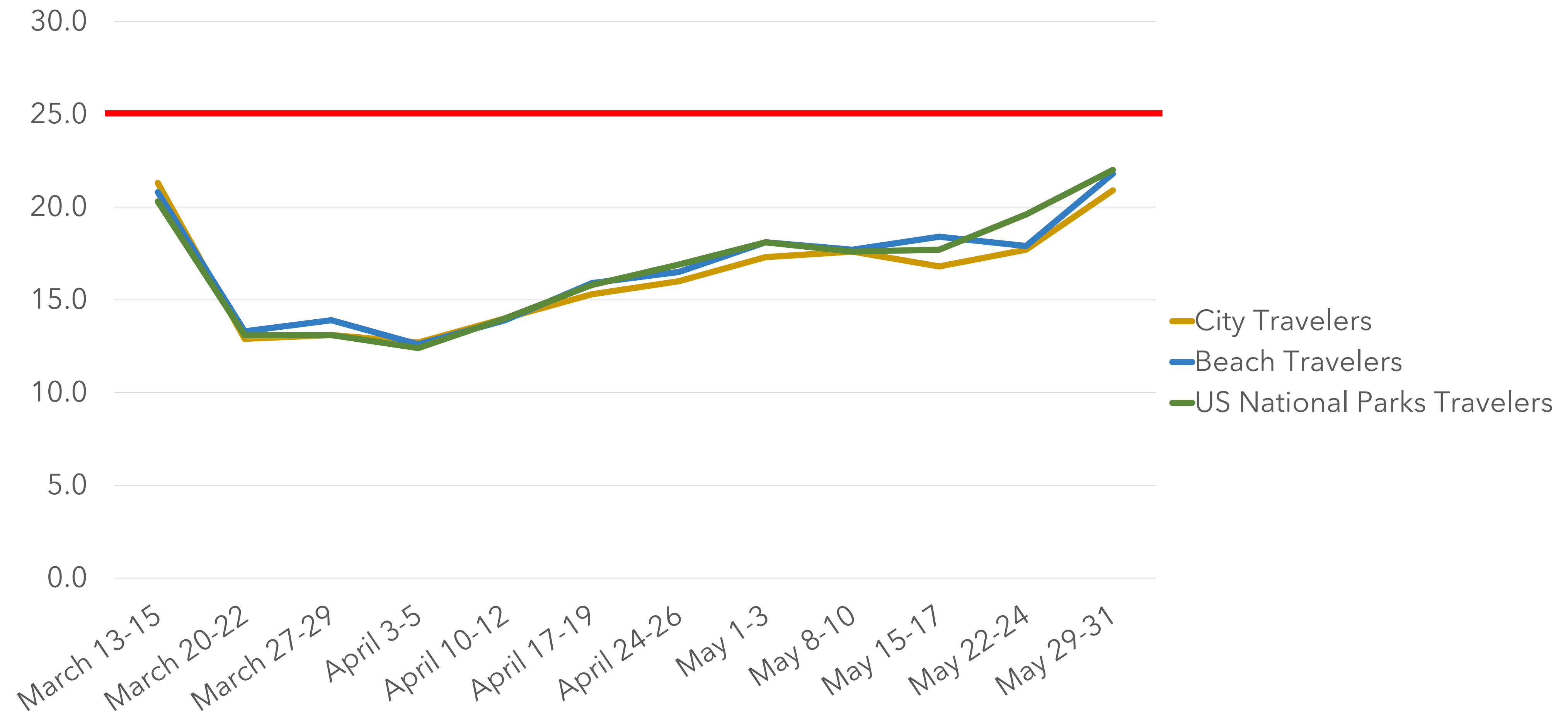




# Favorite Destination Types

## Points of Interest:

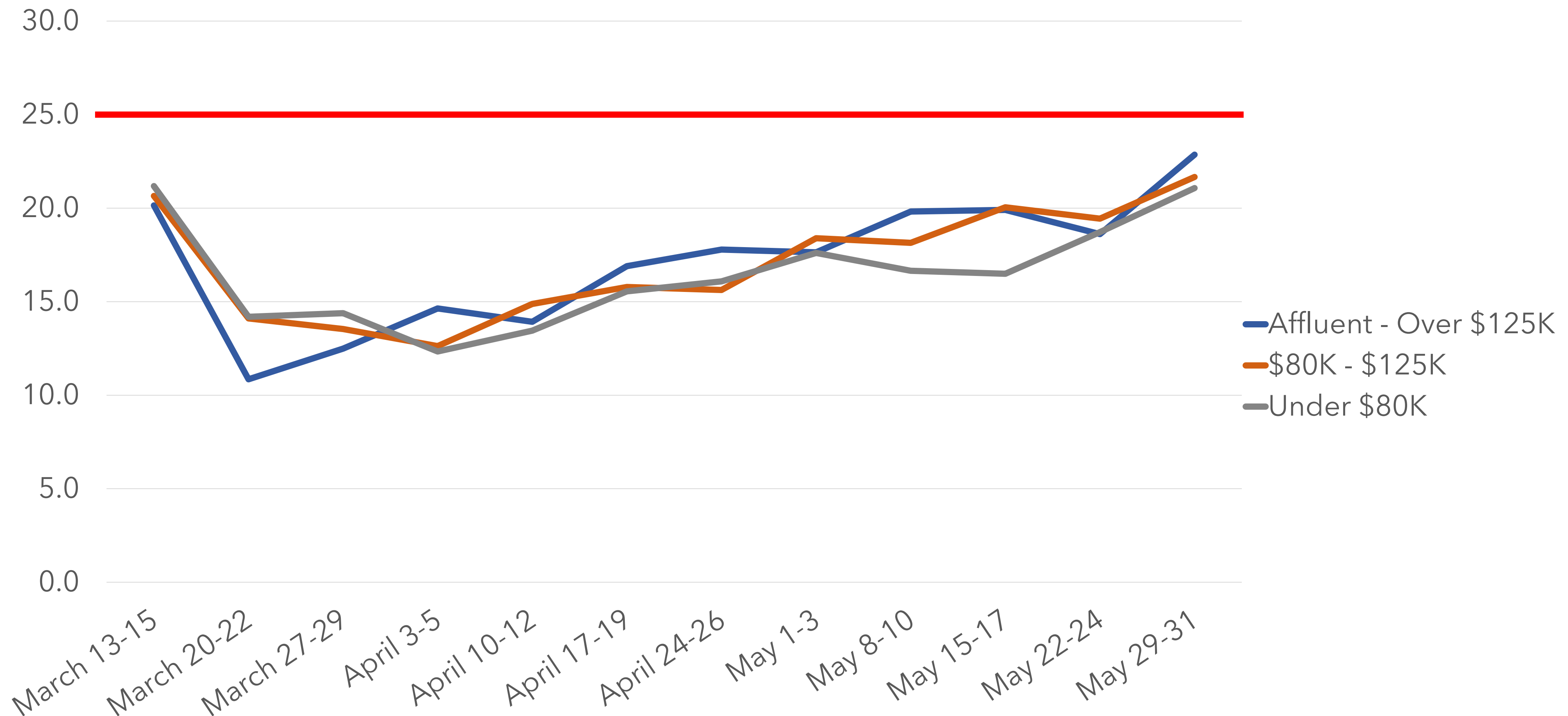
- Travelers who love National Parks again reported the lowest comparative levels of safety concerns this week.
- National Park travelers are the likeliest to travel the farthest on their next road trip (335 miles on average) as well as on their next commercial airline trip (1,135 miles on average).



# Average Income

## Points of Interest:

- Safety and financial concerns among Affluent respondents dropped this week while non-affluent respondents showed less significant drops or slight growth in those concerns.
- Affluent respondents were the most open to travel-related messaging this week, but the least excited about traveling on average.







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