

# Domestic leisure traveler sentiment in light of coronavirus/COVID-19

March 16, 2020

# Key Findings

- 14% have already changed leisure travel plans (up from 6% a week ago)
- 50% are likely to change leisure travel plans
- 36% are delaying leisure travel decisions
- Mountain areas are seen as the safest places to go (57% agree they're safe)
- Cities are viewed as the riskiest places (63% agree they're risky)
- Attitudes generally did not vary significantly by age

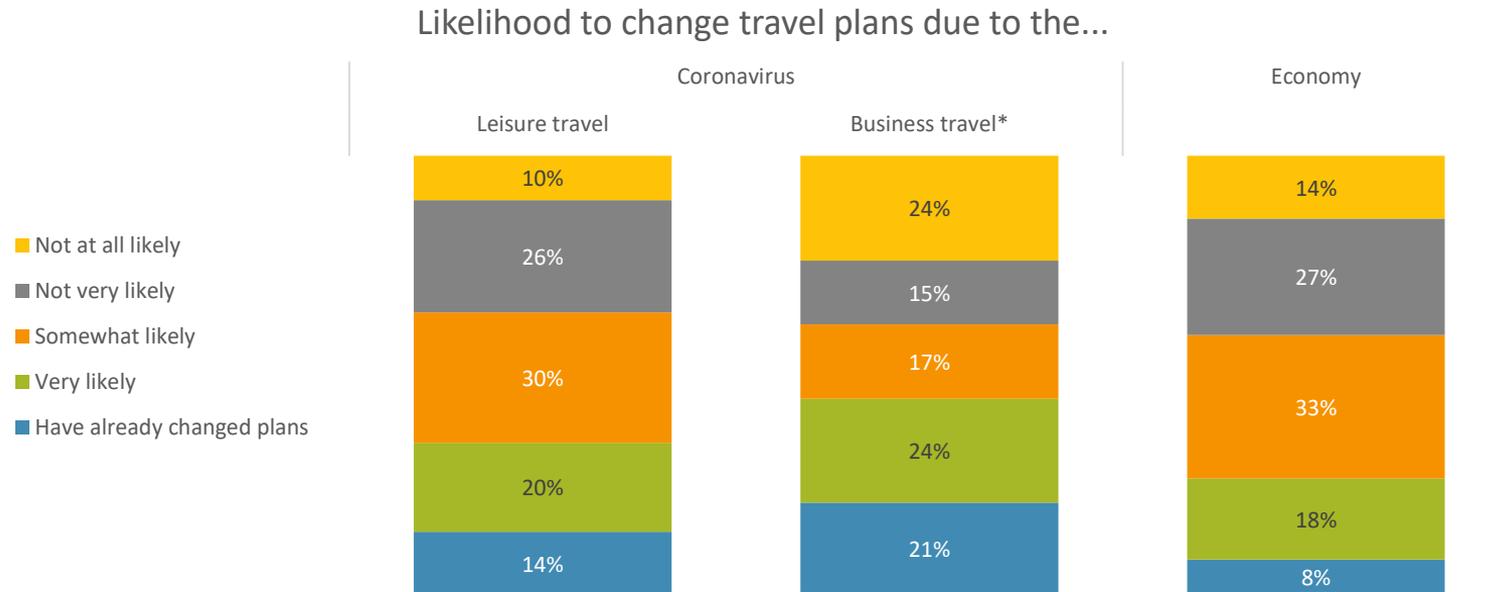
# Methodology

- The initial wave, fielded on March 5, 2020, surveyed 600 domestic leisure travelers from a national sample, screened to ensure they:
  - Regularly take leisure trips of at least 50 miles from home and/or that include an overnight stay
  - Are leisure travel decision-makers for their households
  - Are 18 years or older
- The second wave, fielded on March 12, surveyed 750 domestic leisure travelers from a national sample, using the same screening criteria as above.
- Data were cleaned, coded, and prepared for analysis.

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# **MARCH 16, 2020, REPORT**

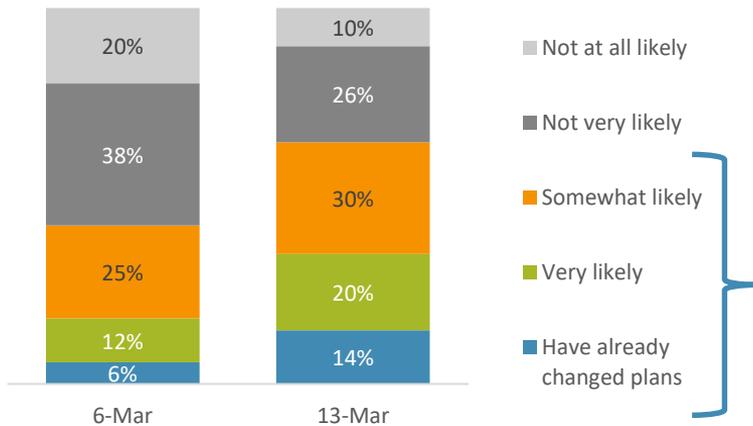
# Traveler sentiment snapshot – March 13



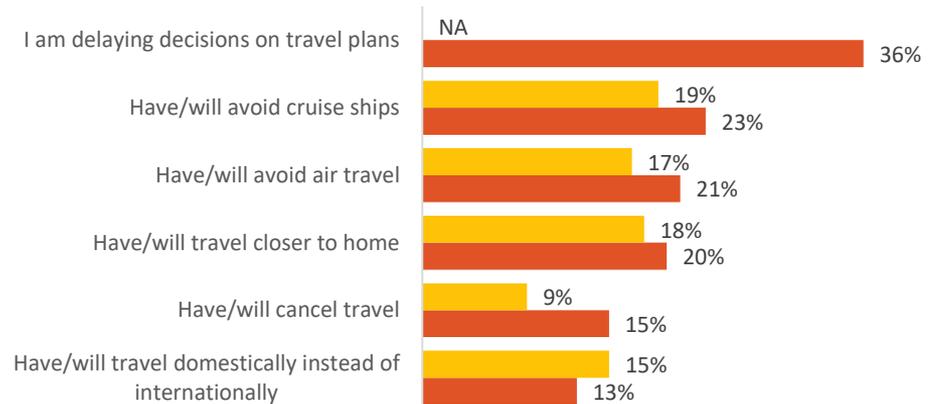
\*Results are for the 52% of travelers for whom business travel applies.

Travelers are taking a wait-and-see approach to their leisure travel; just over a third are delaying decisions on their leisure travel plans. This is probably a function of how far in the future consumers typically plan travel.

How likely is the coronavirus to change your leisure travel plans?

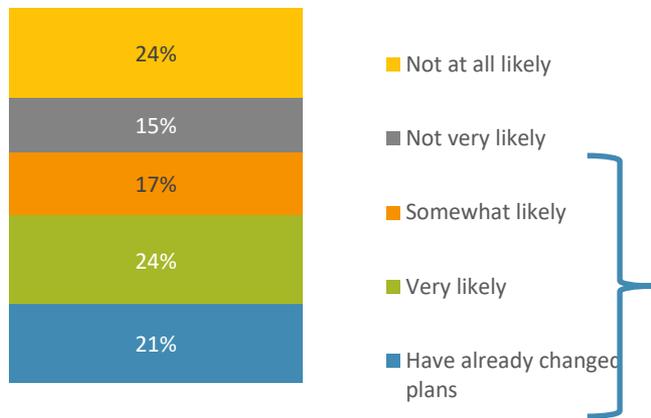


How has/will the coronavirus influence your leisure travel plans? (% of total respondents)

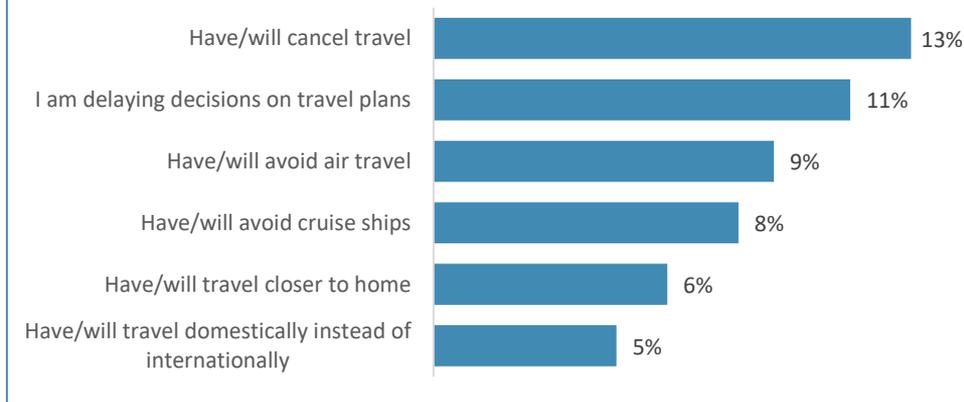


Half of travelers also take business/conference trips. Those are the first plans to change since these may have a shorter planning window; 11% of travelers are delaying decisions on their business/conference travel plans – as many as have already changed business travel plans.

How likely is the coronavirus to change your business/conference travel plans?  
(% of total respondents)



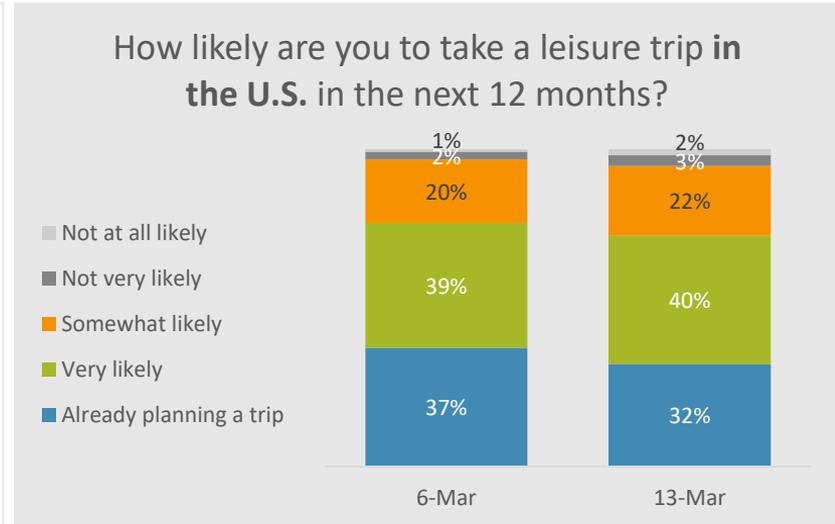
How has/will the coronavirus influence your business/conference travel plans?  
(% of total respondents)



No tracking data available for business travel questions.

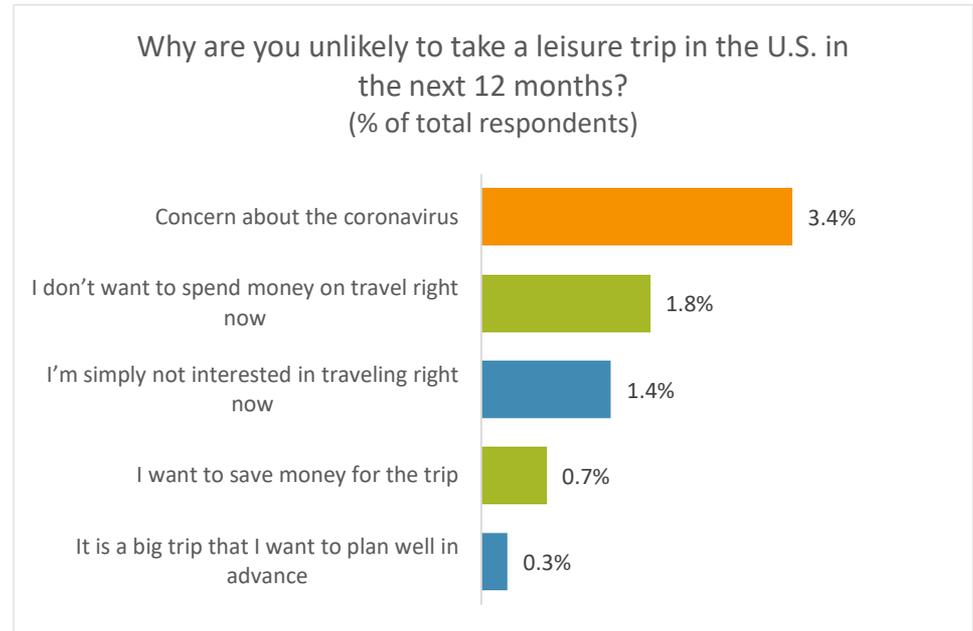
# 12-month planning window

- In terms of travel expectations for the coming year, there is little change week to week. Fewer people may be making specific plans for the immediate future, but 95% are still likely or planning to take a domestic leisure trip in the next year.



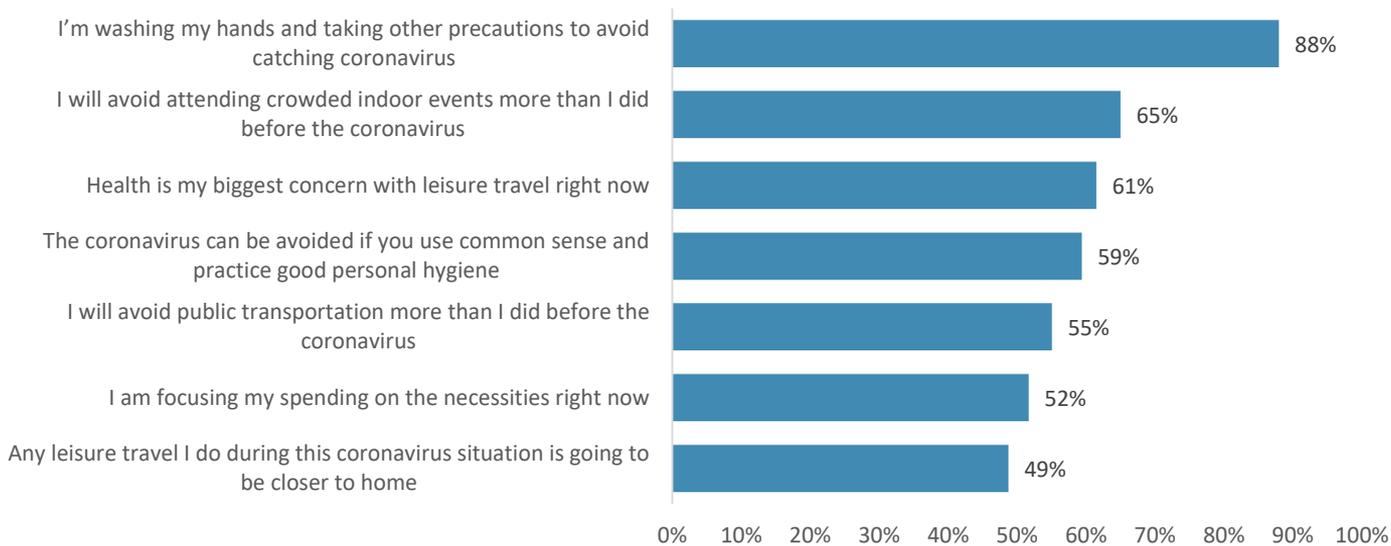
# Concern about the coronavirus is growing.

- Of leisure travelers, 3.4% are unlikely to travel for leisure domestically due to concern about the coronavirus, up from 0.7% a week ago.
- Slightly fewer – 2.5% – gave economic reasons for not wanting to travel right now (want to save for a trip and/or don't want to spend money on travel right now).
- However, these concerns are impacting immediate plans. Travelers still expect to be taking trips at some point in the coming year.



# About half of travelers will stay closer to home for leisure travel and nearly two-thirds will avoid crowded indoor events.

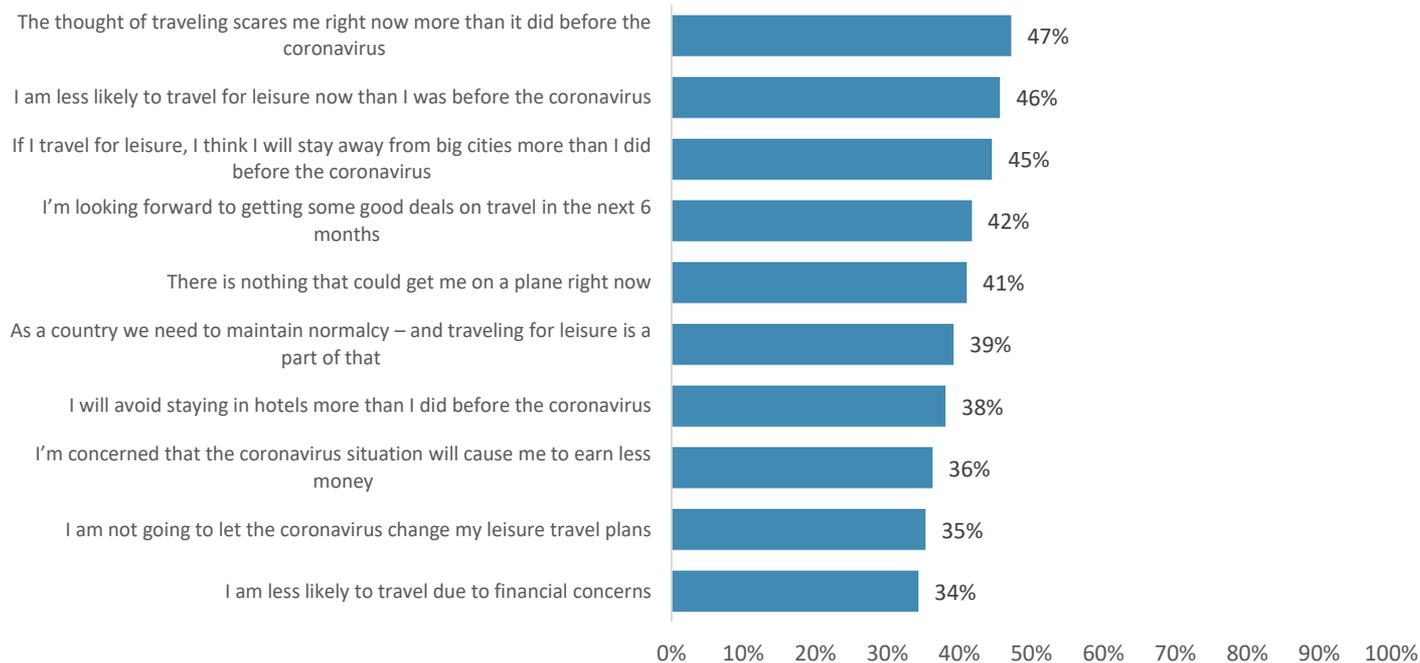
## Higher agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

# While travel is scary for some right now, nearly as many view this as an opportunity for travel deals.

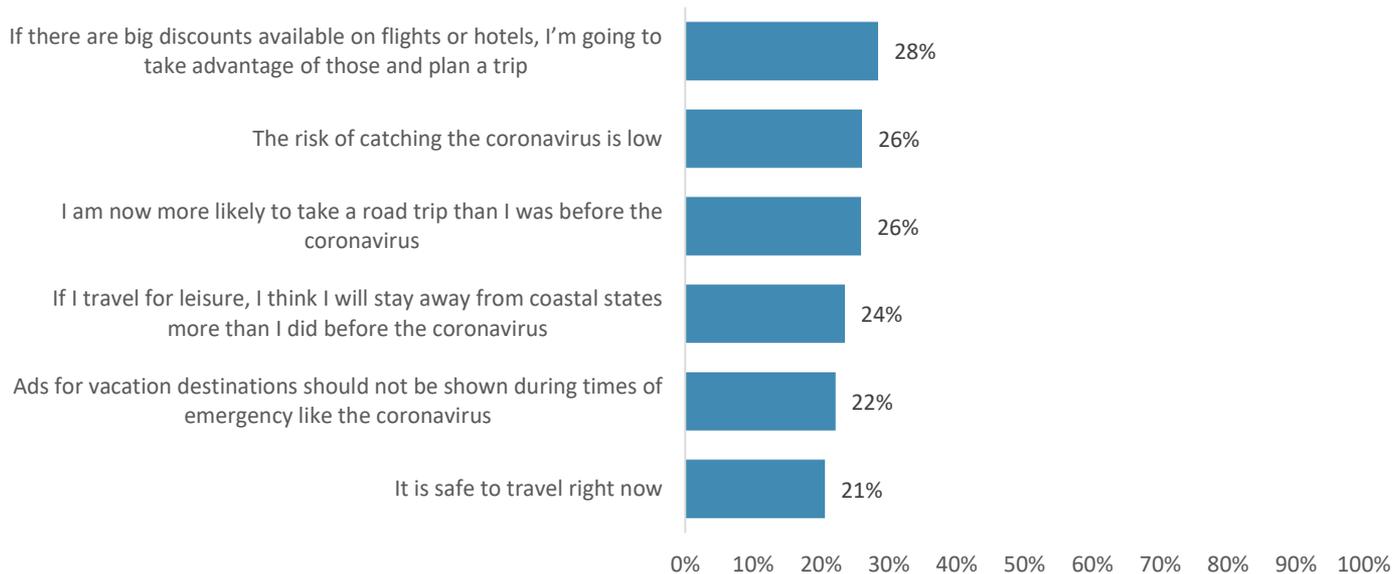
## Mid-range agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

# Fewer than a third of consumers are actively looking for travel discounts, but views toward travel are shifting.

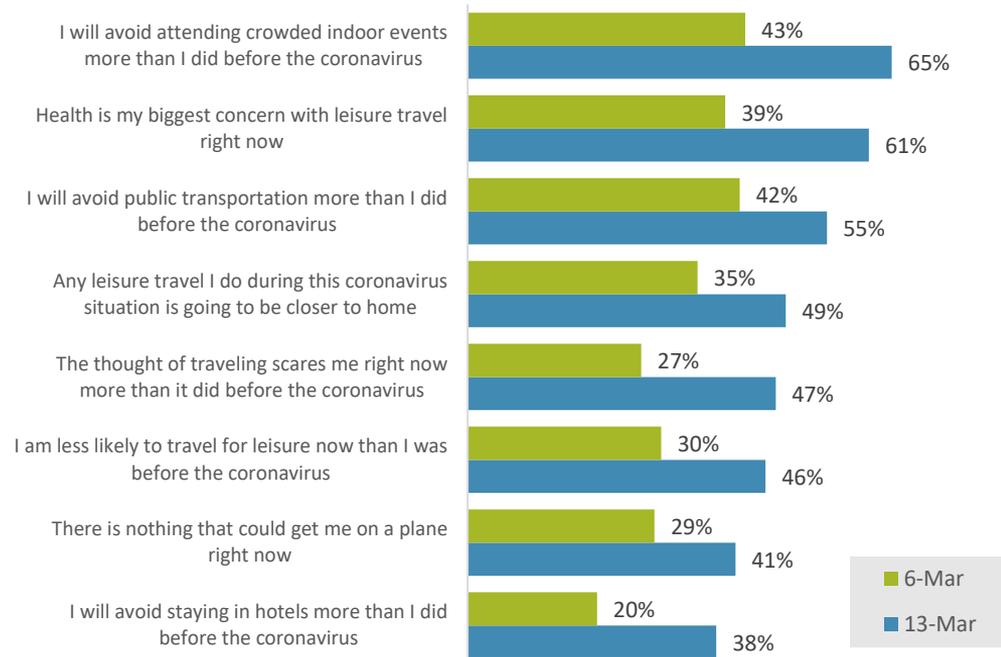
## Lower agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

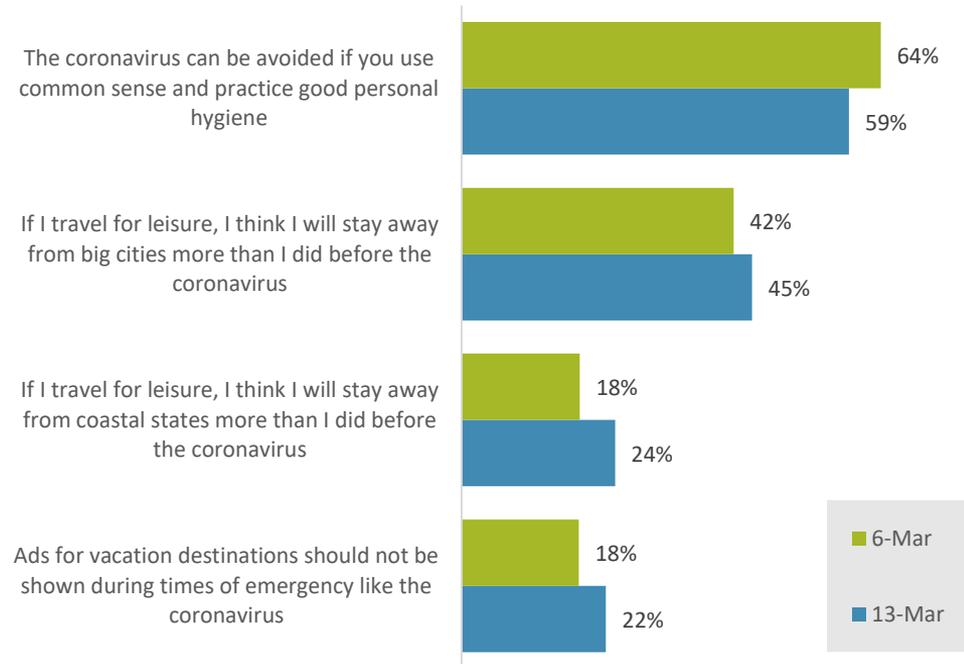
Travelers are now more cautious than a week ago about crowded indoor events, public transportation, long-haul travel and hotels.

### Higher agreement this week than last

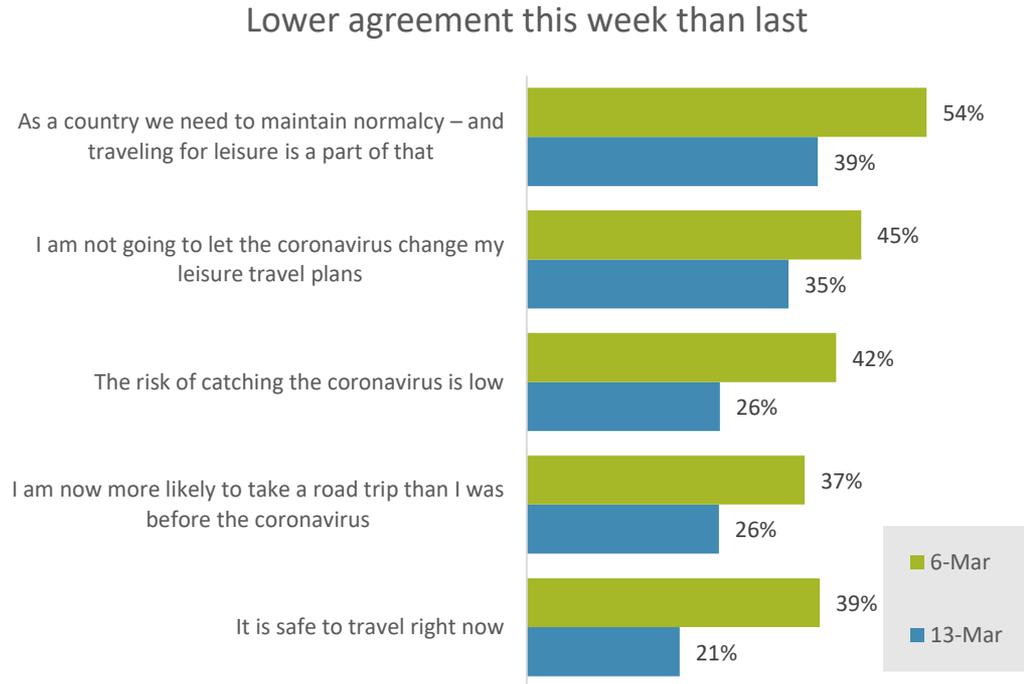


Attitudes have not changed much toward a common-sense approach to the virus, cities and coastal areas as travel destinations, and leisure advertising.

Similar agreement this week to last

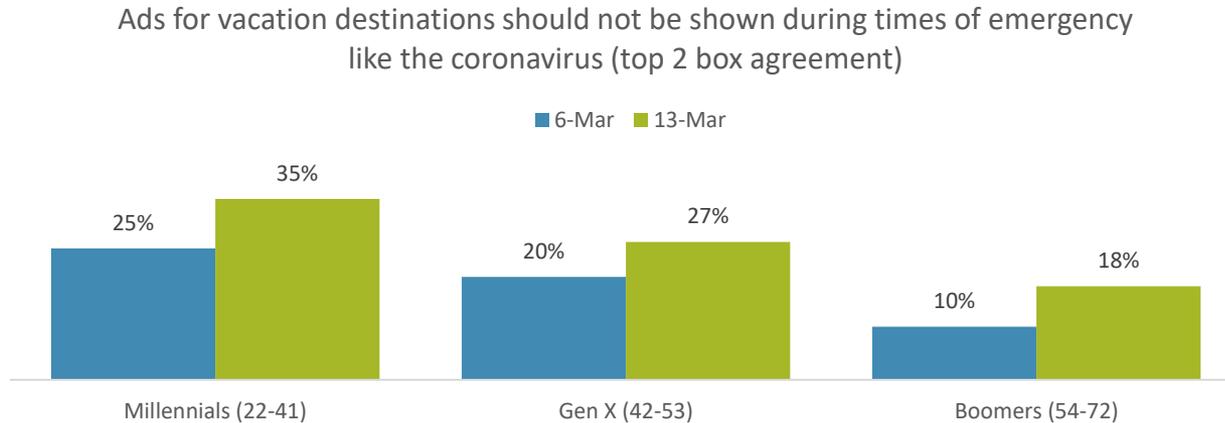


Travelers are more cautious now than a week ago about the virus itself and about travel.



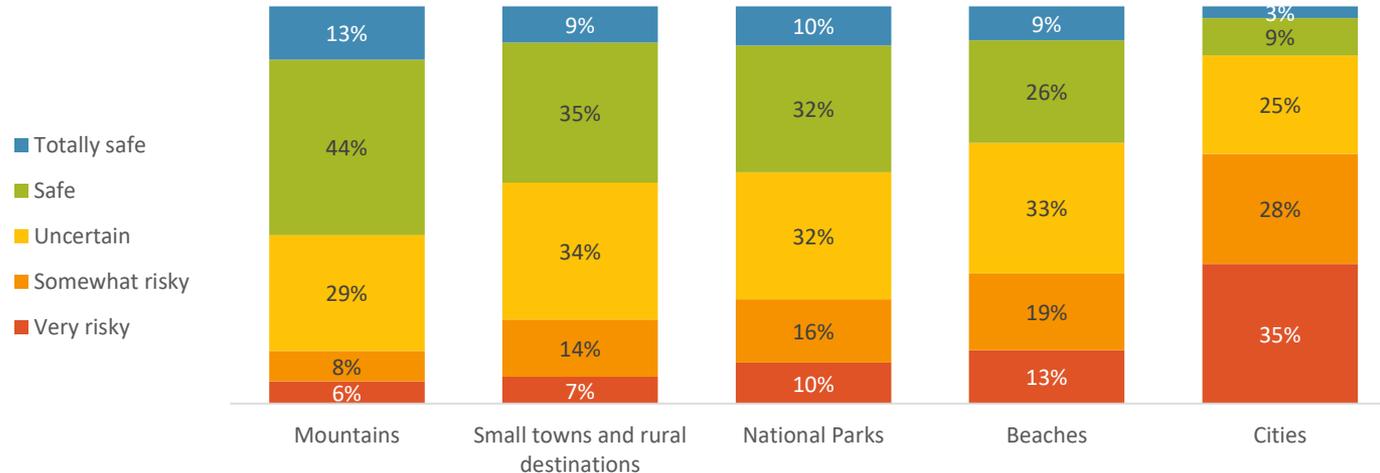
# Older travelers are less concerned about leisure travel advertising right now than younger travelers are.

- In general, Gen X and Boomer travelers do not have a problem with leisure destination advertising during the current pandemic. This may be due to future planning and thinking about places to go after the crisis has passed, while younger travelers are more consumed by the moment.



# Travelers view cities as risky places to visit right now; outdoor and small/rural destinations seem safer.

How safe do each of these types of destinations feel to you given the coronavirus?



# Right now, travelers prefer more solitary leisure trip activities and remote locales that limit interaction with others.

Keeping coronavirus in mind, which of these activities or experiences are you more likely to participate in on a vacation?

<b>Taking a drive with scenic views</b>	<b>52%</b>
<b>Going on a hike</b>	<b>40%</b>
<b>Relaxing in a cabin or vacation rental</b>	<b>34%</b>
<b>Participating in outdoor activities</b>	<b>27%</b>
Indulging in local cuisine and restaurants	19%
Shopping at local, independent stores and boutiques	16%
Visiting museums or attractions	10%
Staying in a hotel in a city center	9%
Going to a brewery or out for cocktails	8%
Exploring a vibrant downtown area	7%
Participating in an outdoor festival	6%
Going to a spa	6%
Attending theater or concerts at small venues	6%
Taking a sightseeing tour on a bus or trolley	5%
Participating in an immersive activity with other people where you have a new experience or learn something different	4%
Going to art galleries or studios	3%

Respondents could choose up to three activities.