



site PULSE SURVEY

**Destination Selection in a
Time of Geopolitical
Uncertainty | April 2026**

Executive Summary

This report presents the final analysis of the SITE Pulse survey on destination selection, examining how escalating geopolitical tensions, and in particular the actions of the USA and Israel in the region known informally as "Iran", are influencing travel planning intentions. A total of 193 valid submissions were collected between 25 March and 6 April 2026.

Respondents were drawn from four geographic cohorts: the United States (n=85, 44%), Europe (n=53, 27%), Asia (n=17, 9%), and a Rest of World group comprising Canada, Oceania, Mexico, Central and South America, Southern Africa, the Caribbean, and the Gulf States (n=38, 20%).

The survey asked respondents to indicate, for each of eleven potential destinations (plus cruise), whether current geopolitical conditions had changed their travel intentions: choices ranged from "Will not consider" through "Less than initially planned", "Same as initially planned", "More than initially planned", to "Will now consider". Responses coded as "Not Applicable" were excluded from percentage calculations on a per-destination basis.

Key Findings

Gulf States emerged as the single most negatively affected destination across all four respondent groups, with net sentiment scores of -82% (USA), -72% (Europe), -21% (Asia), and -54% (Rest of World). This represents the sharpest and most consistent global consensus among all destinations tested.

Northern Africa recorded strongly negative sentiment among USA (-55%), European (-33%), and Rest of World respondents (-65%), while Asian respondents were marginally positive (+7%), suggesting the region's associations with conflict spillover vary significantly by geography.

The United States as a destination is experiencing a sharp divergence. American respondents themselves remain moderately positive (+23%), treating domestic travel as a default alternative. All other groups, however, are substantially negative: European respondents score the USA at -19%, Asian at -33%, and Rest of World at -35%.

Europe and Canada are the principal beneficiaries of geopolitical disruption. European respondents show strong positive intent toward remaining in Europe (+54%), Canada (+67%), Central and South America (+56%), and Asia (+31%). USA respondents pivot modestly toward domestic travel, the Caribbean (+24%), and Europe (+17%). Asian respondents are moving toward Southern Africa (+53%) and their own region (+31%), while Rest of World respondents favour Canada (+46%) and Central and South America (+40%).

Asia and Oceania as destinations are also gaining, particularly among European respondents (Asia +31%, Oceania +32%) and Asian respondents themselves (Asia +31%, Oceania +19%). These patterns suggest that travellers are rotating away from Middle Eastern and North African itineraries toward destinations perceived as geopolitically stable.

Methodology

The SITE Pulse survey was distributed digitally from 25 March through 6 April 2026. Respondents self-identified their home region, which was then used to assign them to one of four analytical groups.

The survey instrument presented eleven destination categories, plus a cruise option, and asked respondents to indicate the direction of change in their travel intentions relative to pre-crisis planning. Responses were recorded on a five-point directional scale. "Not Applicable" responses indicate that the respondent did not have relevant travel plans for a given destination and are excluded from all percentage calculations, meaning base sizes (n) vary by destination and group.

The net sentiment score used throughout this report is calculated as the percentage selecting "More than initially planned" or "Will now consider" minus the percentage selecting "Less than initially planned" or "Will not consider". A positive score indicates net upward intent; a negative score indicates net downward intent.

Given the relatively small size of the Asia cohort (n=17), findings for that group should be interpreted with particular caution. Percentages derived from small valid bases at the destination level may be highly sensitive to individual responses.

Respondent Composition

Group	n	%	Regions Included
USA	85	44%	United States (incl. Alaska & Hawai'i)
Europe	53	27%	Europe
Asia	17	9%	Asia
Rest of World	38	20%	Canada, Oceania, Mexico, C&S America, S. Africa, Caribbean, Gulf States
Total	193	100%	

Net Sentiment Scores: All Groups

The table below shows the net sentiment score for each destination, broken out by respondent group. Scores are colour-coded from strong negative (red) to strong positive (dark green).

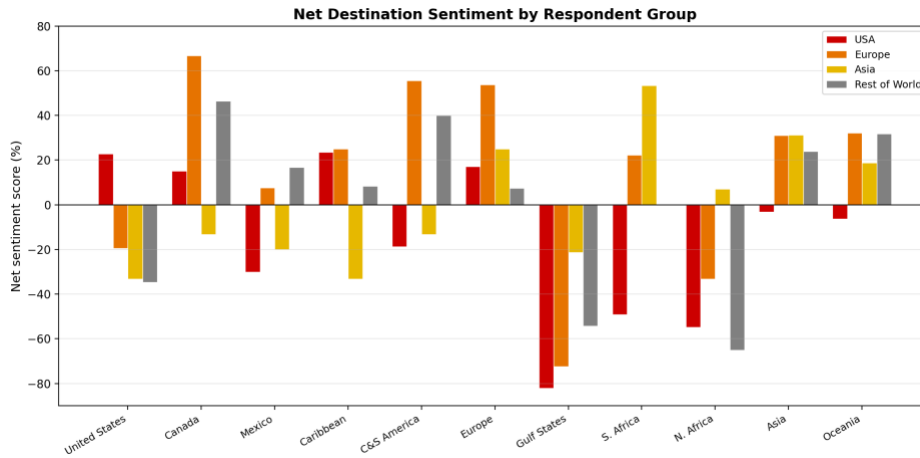
■ Dark green = strong positive (+40% or above) ■ Light green = moderate positive ■ Light pink = moderate negative ■ Red = strong negative (-40% or below)

Destination	USA (n=85)	Europe (n=53)	Asia (n=17)	Rest of World (n=38)
United States	+22.8%	-19.4%	-33.3%	-34.6%
Canada	+15.1%	+66.7%	-13.3%	+46.4%
Mexico	-30.1%	+7.7%	-20.0%	+16.7%
Caribbean	+23.6%	+25.0%	-33.3%	+8.3%
Central & South America	-18.8%	+55.6%	-13.3%	+40.0%
Europe	+17.1%	+53.7%	+25.0%	+7.4%
Gulf States	-82.1%	-72.4%	-21.4%	-54.2%
Southern Africa	-49.2%	+22.2%	+53.3%	0.0%
Northern Africa	-54.8%	-33.3%	+7.1%	-65.0%
Asia	-3.1%	+31.0%	+31.2%	+24.0%
Oceania	-6.3%	+32.1%	+18.8%	+31.8%

Source: SITE Pulse Survey, March to April 2026. Net score = % (More than planned + Will now consider) minus % (Less than planned + Will not consider). "Not Applicable" responses excluded from base.

Cross-Group Comparison

The chart below plots the net sentiment score for all four respondent groups side by side for each destination, making regional contrasts immediately visible.



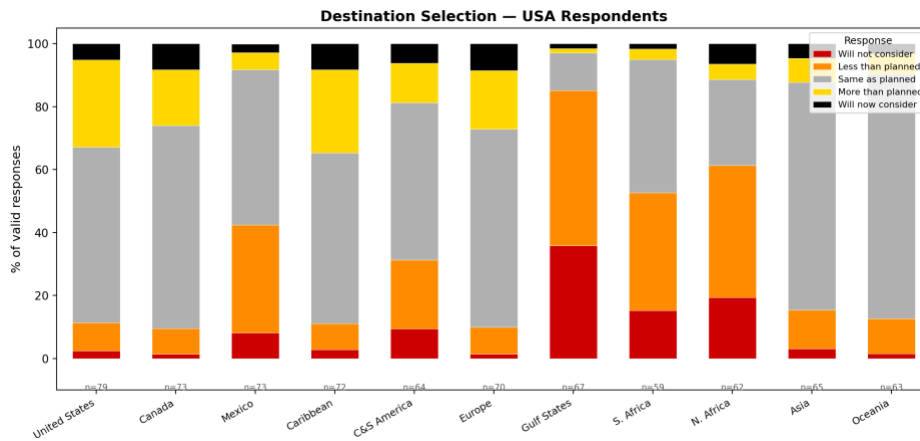
Section 1: USA Respondents (n=85)

American respondents show a clear domestic pivot. The United States itself records the highest net positive score among USA respondents at +23%, closely followed by the Caribbean (+24%) and Canada (+15%). Europe is also mildly positive at +17%, reflecting continued appetite for transatlantic travel.

The strongest negatives among American respondents are directed at the Gulf States (-82%) and Northern Africa (-55%), both of which sit within or adjacent to the theatre of conflict. Southern Africa (-49%) also records a substantial negative, which may reflect broader hesitancy about long-haul destinations during a period of uncertainty rather than direct conflict exposure.

Mexico records a notable negative among US respondents (-30%), which likely reflects the compounding of geopolitical uncertainty with existing bilateral tensions, tariff disputes, and security concerns rather than any direct link to the Iran context. Central and South America is also negative at -19%, contrasting with the positive signals these destinations receive from non-US groups.

Asia and Oceania sit close to zero for US respondents (-3% and -6% respectively), suggesting uncertainty rather than strong intent in either direction. Europe at +17% is the one long-haul positive, possibly reinforced by a sense of shared Western identity and political alignment.



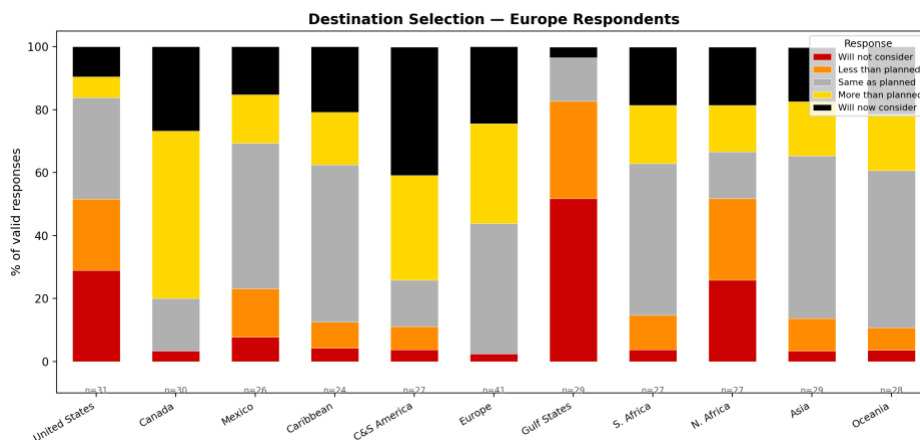
Section 2: European Respondents (n=53)

European respondents show the most diversified positive travel intentions of any group. Canada (+67%) and Central and South America (+56%) record the highest net scores in the entire dataset, suggesting European travellers are actively rotating long-haul itineraries away from conflict-adjacent zones toward the Americas.

Europe itself is strongly positive (+54%), which may indicate that some European respondents who had considered transatlantic or Middle Eastern travel are now opting to travel within the continent. Asia (+31%) and Oceania (+32%) are also solidly positive, and Southern Africa registers +22%.

The United States records a negative score among European respondents at -19%, a finding with significant commercial implications. European travellers are clearly factoring US political positioning into their destination choices, and the signal is directionally negative, albeit moderate. This contrasts sharply with the positive view American respondents hold of their own domestic market.

The Gulf States (-72%) and Northern Africa (-33%) are strongly negative among European respondents, consistent with the overall pattern.



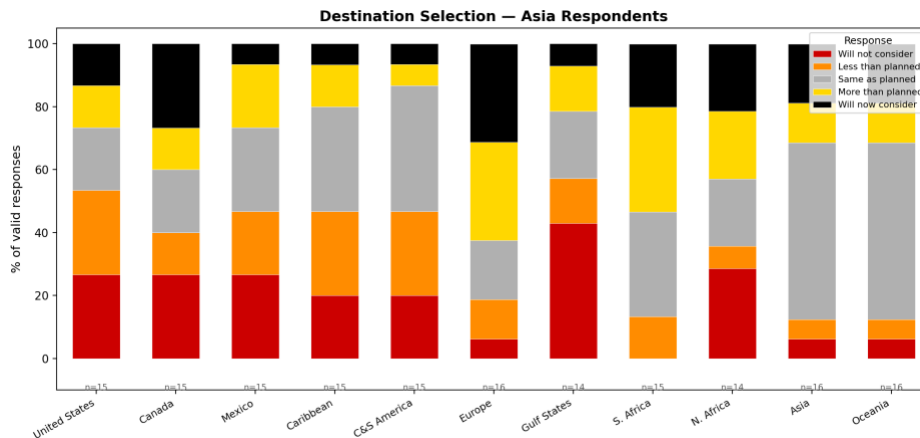
Section 3: Asian Respondents (n=17)

The Asian cohort is the smallest in this dataset and all findings should be treated as indicative rather than definitive. That said, the directional signals are striking and often diverge sharply from the other groups.

Southern Africa (+53%) is the single highest score among Asian respondents across the entire survey, suggesting that long-haul safari and Southern African itineraries are actively gaining interest. Asia itself (+31%) and Europe (+25%) are also positive, along with Oceania (+19%).

In contrast, the United States records -33% among Asian respondents and the Caribbean -33%, both strongly negative. Canada and Central and South America are mildly negative at -13% each. This suggests that Asian travellers are not pivoting toward North American or Caribbean destinations as a response to Middle Eastern disruption. Instead, they appear to be either staying closer to home or selecting long-haul alternatives such as Southern Africa.

Northern Africa is marginally positive at +7% among Asian respondents, the only group to register a positive score for this destination. Gulf States are negative at -21%, less extreme than USA or European respondents but still clearly net negative.



Section 4: Rest of World Respondents (n=38)

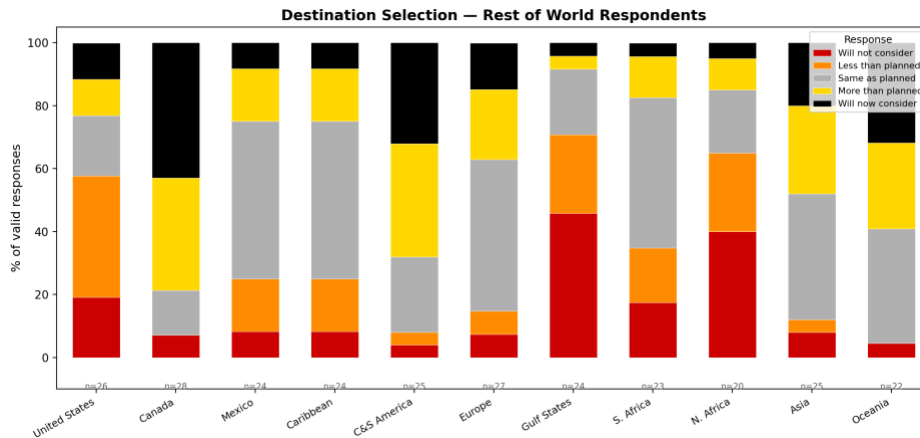
This cohort brings together respondents from Canada, Oceania, Mexico, Central and South America, Southern Africa, the Caribbean, and the Gulf States. While internally diverse, this group collectively represents a non-US, non-European, non-Asian perspective and shows some distinctive patterns.

Canada (+46%) and Central and South America (+40%) record the highest net scores for this group, likely reflecting intra-regional preference and a general pivot toward the Americas. Oceania (+32%) and Asia (+24%) are also strongly positive.

The United States records -35% among Rest of World respondents, a signal that broadly mirrors the European and Asian finding. This is a commercially significant result: across all non-US groups, the United States as a destination is registering net negative intent, driven by the perception of the US as a geopolitical actor in the current crisis.

Northern Africa (-65%) is the most strongly negative score in the entire dataset for this group, even exceeding their negative view of the Gulf States (-54%). This may reflect the specific composition of this cohort, including respondents from Mexico and Central and South America who may have particularly limited interest in North African travel.

Southern Africa sits at exactly 0% for Rest of World respondents, suggesting a balance between those increasing and decreasing intent, in contrast to the positive signal seen from Asian and European respondents.



Conclusions and Implications

The Gulf States and Northern Africa are the clearest casualties

Across all four respondent groups, the Gulf States record the strongest negative net scores in the dataset. Northern Africa is broadly negative except among Asian respondents. These two destinations, both geographically proximate to the conflict, are experiencing the most consistent and severe decline in travel intent. The industry should anticipate significant short-to-medium-term reductions in business from all major source markets to these destinations.

The USA faces a growing perception problem as a destination

The most commercially significant finding for the incentive travel industry may be the consistently negative view of the United States as a destination among all non-US respondent groups. European, Asian, and Rest of World respondents all rate the USA negatively, with net scores ranging from -19% to -35%. This reflects a broader political response to US foreign policy positioning. Destination marketing organisations and incentive travel operators serving the US market should treat this as a material risk.

Europe and Canada are the principal beneficiaries

Europe and Canada emerge as the two destinations with the most consistent and substantial positive signals across multiple respondent groups. For European respondents, this represents a consolidation of intra-regional travel. For non-European respondents, it reflects a rotation toward destinations perceived as politically stable and geographically distant from conflict. Canadian and European DMOs are well positioned to capitalise, provided they can increase capacity and competitive programming.

Asia and Oceania are gaining, particularly outside the USA

European, Asian, and Rest of World respondents all show positive intent toward Asia and Oceania. These long-haul destinations are benefiting from their perceived distance from the conflict zone and, in Asia's case, from active investment in meeting and incentive infrastructure. US respondents are marginally negative or flat on these destinations, suggesting the positive rotation toward Asia and Oceania is primarily a non-American phenomenon.

Central and South America: a split verdict

Central and South America is strongly positive for European (+56%) and Rest of World respondents (+40%), but negative for US respondents (-19%). This split suggests that the region's growth as an incentive destination is driven by international, particularly European, interest rather than by its traditional North American feeder markets.

Limitations

This survey captures stated intent at a specific moment and should not be treated as a firm behavioural forecast. The Asia cohort (n=17) is small and findings for that group are indicative only. The "Rest of World" group is internally heterogeneous. The survey does not disaggregate by industry sector, spend level, or programme type. A follow-up survey in six to twelve months would help determine whether stated intentions are translating into confirmed bookings.