CORONAWIRUS TRAWEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF DECEMBER 14th, 2020

Destination Analysts

About Destination Analysts

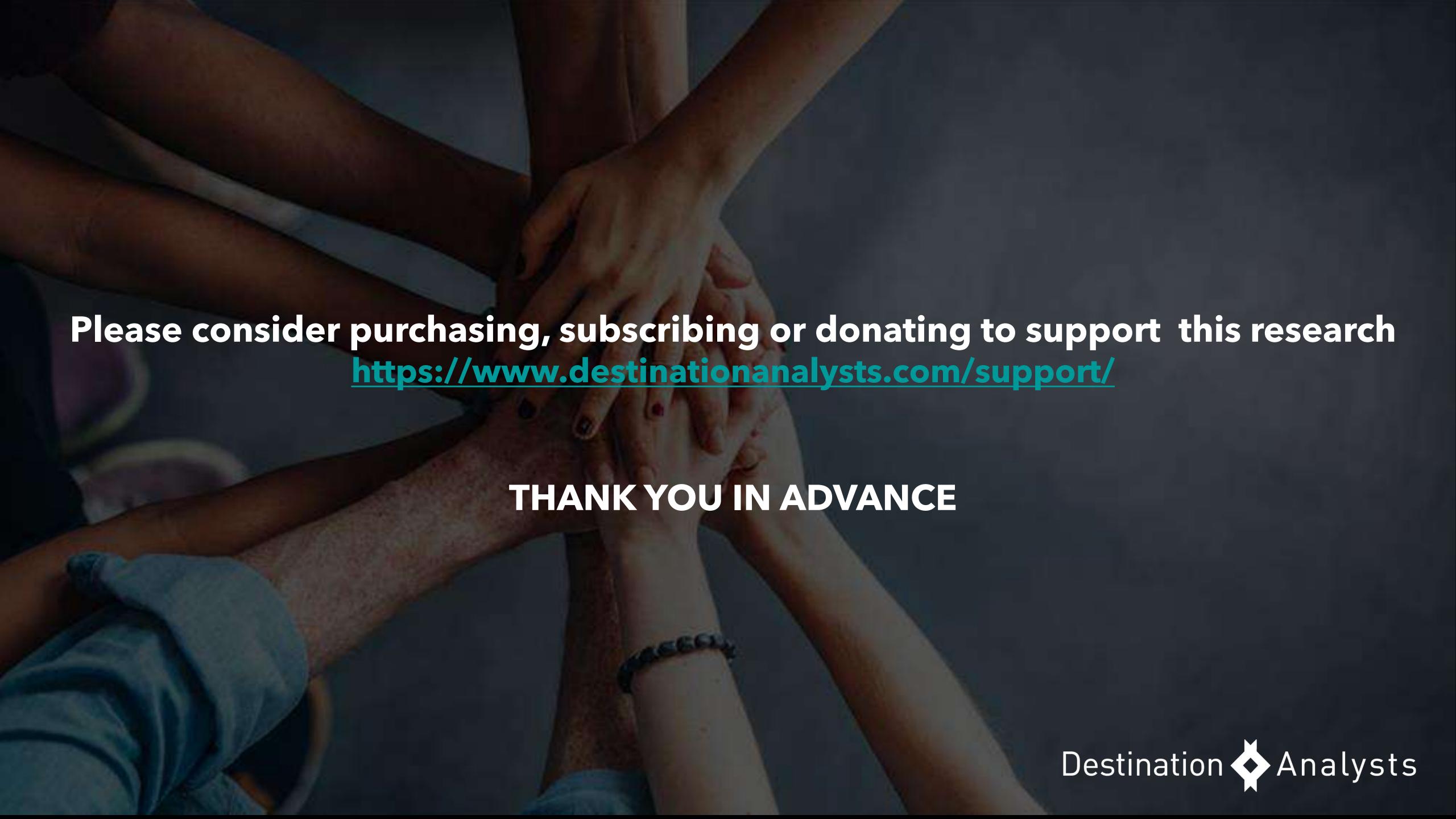
Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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.

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.





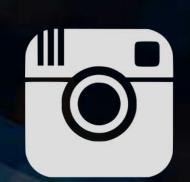
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Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week will feature a panel of meeting & event planners to discuss the types of events they are planning for 2021, the destinations they are looking at and what a prolonged impact of the crisis may be.

Sign up to attend the webinar on Tuesday, December 15th at 11:00am ET <u>here</u>.





High Concerns About COVID-19's Impact

After dipping last week, Americans' anxiety about the coronavirus came on strong again this week.

The percent of Americans with high degrees of concern about personally contracting the virus jumped up to 73.3% from 66.7%, and the intensity of the concern to 6.9 on an 11-point scale, up from 6.5 last week. In similar fashion, those highly concerned about their friends and family contracting the virus rose to 77.8%, and the average level of concern grew to 7.4 from 7.1. This is the first time during this current surge that these anxieties have reached levels hit during the spring and summer virus surges. With a relief bill still not yet passed in Congress, financial worries also grew, with concern about the virus' impact on personal finances now at 6.0 and concerns for the national economy at 7.7. While down somewhat from last week, still 60.7% of Americans feels the severity of the coronavirus situation in the U.S. will worsen in the next month.

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NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT

AS OF DECEMBER 13TH

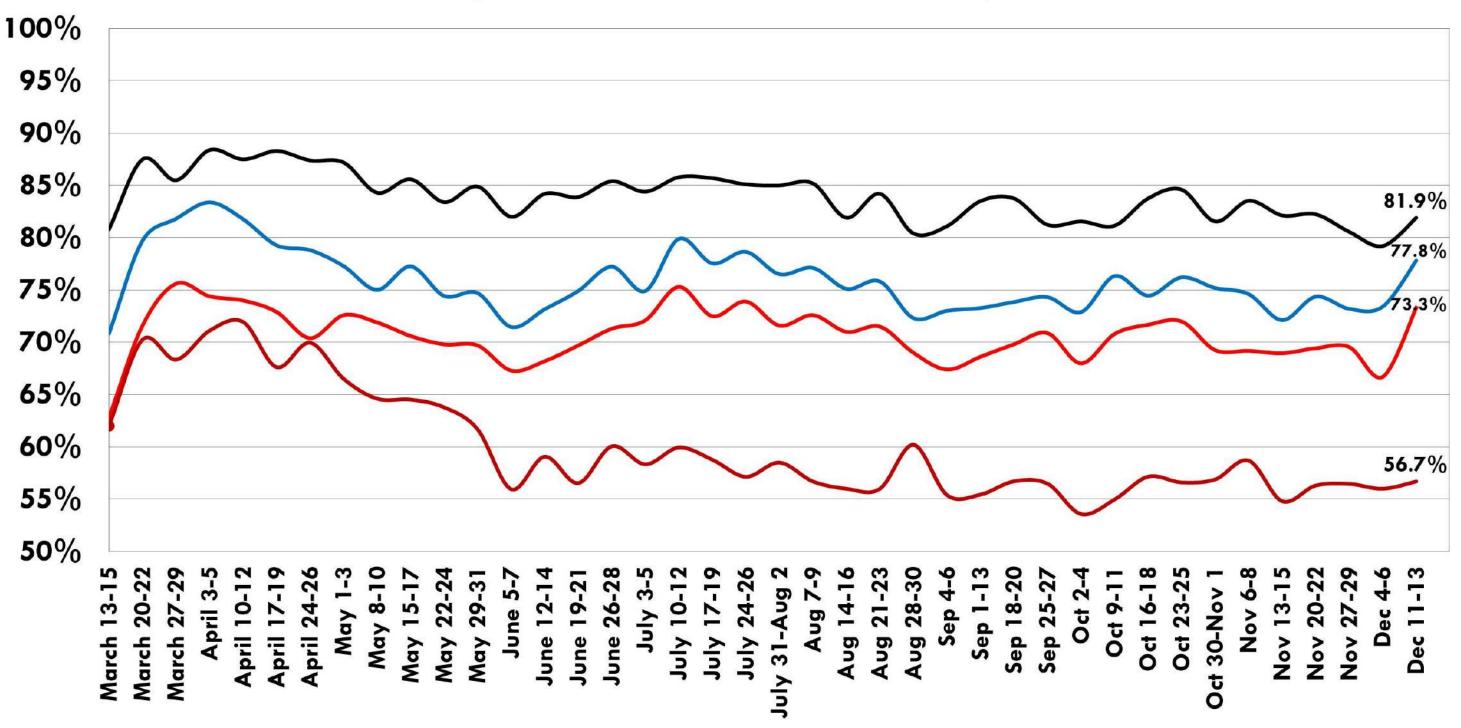








(% ANSWERING 10-6 ON 11-POINT SCALE)



Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the/your____

(Base: Waves 1-40. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,365, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,204, 1,203, 1,203, 1,203, 1,205, 1,205, 1,205, 1,205, 1,204 and 1,206 completed surveys.)

Americans' Travel State-of-Mind

These anxieties are hammering sentiment about travel right now. Rather than skewing towards readiness,

Americans' travel mindset is now evenly split between readiness and hesitation—the last time this occurred was more than three months ago.

This week, 54.6% of Americans said they would feel guilty traveling right now and loss of interest in traveling for the time being returned to 49.5% after falling to 43.1% last week. Over 58% feel travel should be limited to essential needs only and 54.8% agree they don't want travelers coming to their own communities right now.

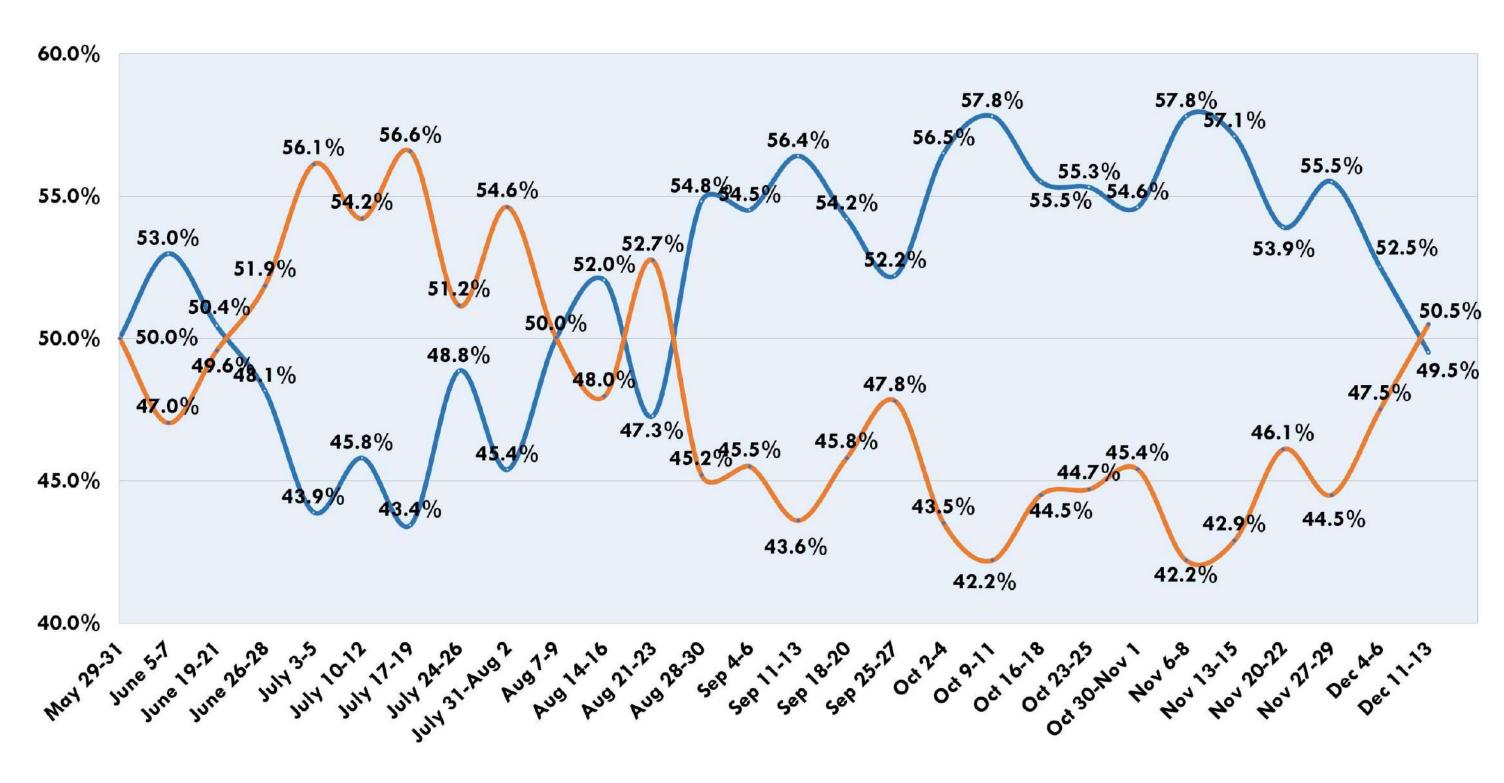
Nearing two-thirds of Americans say the current pandemic situation makes them less likely to travel over the next three months. Such sentiments have led to inevitable behaviors—48.4% report they cancelled or postponed a trip specifically because of this current surge.

AMERICANS' TRAVEL STATE-OF-MIND

MAY 29 - DECEMBER 13







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

(Base: Waves 12-13 and 15-40 data. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,204 and 1,206 completed surveys.)



The COVID-19 Vaccine & Travel

Americans did receive a good "dose" of positive news in the last week, however, which is appearing to have a profound affect on their outlook for 2021. Last week the first person outside of trials was vaccinated for COVID-19 and shipments for an FDA approved COVID-19 vaccine began rolling out of a Pfizer plant in Michigan over the weekend.

With vaccines imminent, the percent of Americans who say they are not traveling without one leapt up to 49.5% from 40.8% just last week. The percent of Americans who feel the recently developed COVID-19 vaccines are safe jumped to 62.4% from 53.3% last week. Now a study high of 49.6% affirm they will take the recently developed vaccine—up more than 10 percentage points in 5-weeks. 45.2% of parents with children under age 18 say they will vaccinate their children for COVID-19, up from 37.9% last week. Importantly, 58.9% of Americans are back to feeling that the vaccine developments make them more optimistic about life returning to normal in the next six months, while 51.0% say the vaccines makes them more optimistic they can travel safely by then.

THE COVID-19 VACCINE & TRAVEL

49.5% Agree they won't travel until there is a vaccine available

Of parents with children under 18 will vaccinate them

45.2%

49.6%

Are willing to take the COVID vaccines recently developed

COVID 19 CORONAVIRUS VACCINE

62.4%
believes the recently
developed COVID-19
vaccines are safe

Feel the recently developed COVID-19 vaccines make them more optimistic about life returning to normal in the next 6 months

Feel the recently developed COVID-19 vaccines make them more optimistic about being able to travel safely in the next 6 months

51.0%

(Base: Wave 40 data. All respondents, 1,206 completed surveys. Data collected December 11-13, 2020)

COVID-19



The Impact of the Pandemic on Americans' Emotional Life

As Americans look at what the coronavirus has taken away from us, they also see areas of their lives which the pandemic situation has strengthened.

The pandemic has, unsurprisingly, most weakened Americans sense of physical safety, as well as, sadly, their excitement about the future. However, an important percentage of Americans feels the pandemic has strengthened their feeling of being loved by others, and made them feel proud of themselves and what they have been able to accomplish. When asked what emotions are priorities for them, two of the top four are happiness and relaxation--things travel still is called to provide when they are comfortable.

THE IMPACT OF THE PANDEMIC ON AMERICANS' EMOTIONAL LIFE

AS OF DECEMBER 13TH

WHAT THE PANDEMIC HAS STRENGTHENED

38.9%

32.6%

FEELING LOVED BY OTHERS

FEELING PROUD OF ONESELF/
ONE'S ACCOMPLISHMENTS

WHAT THE PANDEMIC HAS WEAKENED

42.7%

41.9%

FEELING SAFE—
PHYSICALLY SECURE

FEELING EXCITED ABOUT THE FUTURE

Question: In your daily life, how has the coronavirus pandemic affected your personal sense of each? (Select one for each)

The coronavirus pandemic has _____ how I feel this in my daily life.

(Base: Wave 40 data. All respondents, 1,206 completed surveys. Data collected December 11-13, 2020)



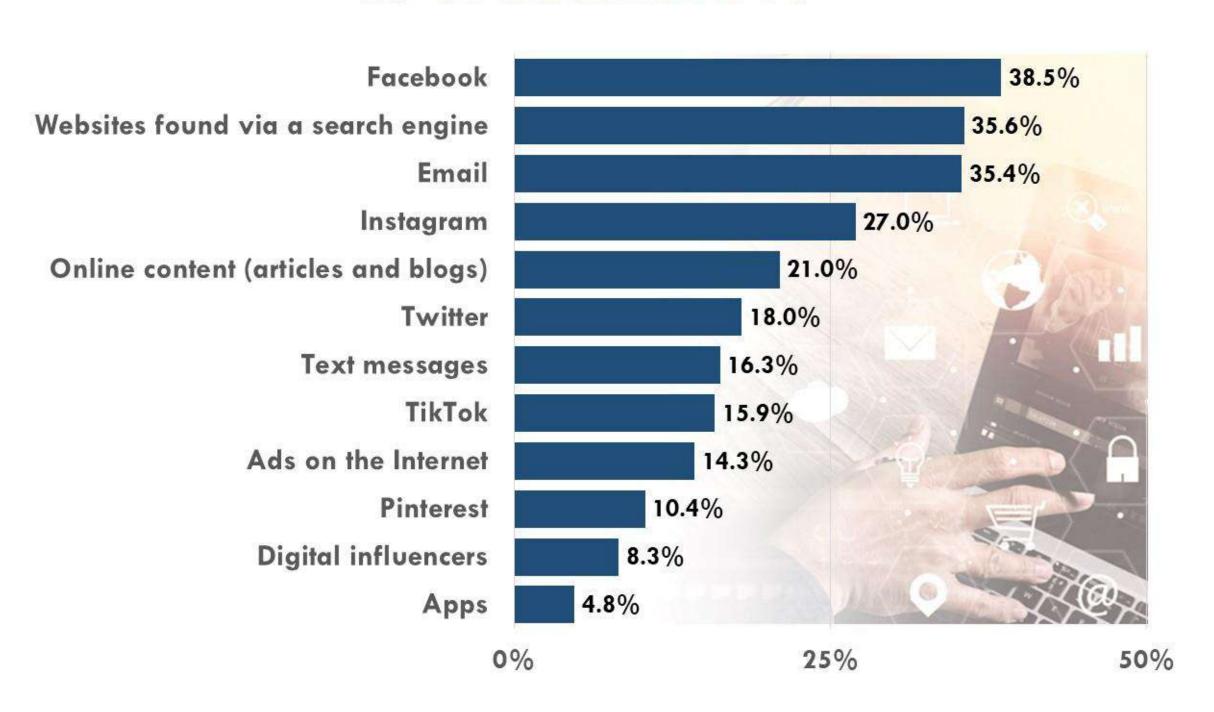
Top Channels for Travel Inspiration Among Americans Most Ready to Travel

Americans continue to exhibit receptivity to travel marketing for future trips.

50.1% continued to show higher degrees of excitement about taking a getaway soon, a metric continuing to recover from a low point hit the week of November 16th. And 45.7% continue to have higher levels of openness to travel inspiration. In fact, the percent of Americans who recalls seeing a travel advertisement recently has risen steadily since May—up to 31.1% from 17.8%. When asked how the most recent travel ad they saw made them feel, 56.7% report this ad made them feel happy or very happy. Looking at the preferred channels for travel inspiration among those Americans most ready to travel, Facebook and Instagram, search engines and email campaigns is where these travelers will be most receptive.

TOP CHANNELS FOR TRAVEL INSPIRATION AMONG AMERICANS MOST READY TO TRAVEL

AS OF DECEMBER 13TH



Question: Now let's talk about travel advertising and promotions. Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

(Base: Wave 40 data. Respondents who selected 'I'm already traveling' or 'I'm ready to travel, with no hesitations' to the question: "When it comes to getting back out and traveling again, which best describes your current state-of-mind?", 278 completed surveys. Data collected December 11-13, 2020)



Convention Travelers Comfort Attending Events—By Month

Looking at the recovery of the meetings industry, the percent of American travelers who have at least tentative plans to attend a convention or conference in the next year has risen to 23.5% from 15.7% two months ago.

Just 26.3% said they would be happy if they were asked by their employer to attend a conference within the next six months, while 42.0% would be unhappy. You can see this sentiment when looking at comfort levels in attending such events in each of the next several months. As shown in the chart to the right, comfort grows in June 2021 and continues throughout the subsequent months.

Right now, 54.3% of American travelers say they at least somewhat trust other conference attendees to behave in a way that keeps others safe from COVID-19, while 60.7% say they trust the event producers to look out for their health.

CONVENTION TRAVELERS COMFORT ATTENDING EVENTS—BY MONTH [% WHO FEEL COMFORTABLE OF VERY COMFORTABLE ATTENDING AN EVENT IN EACH MONTH] AS OF DECEMBER 13TH



Question: Please think about the current path of the COVID-19 situation, and imagine your employer asks you to attend a convention of conference next year. For each month listed, how comfortable do you expect you would be attending the convention or conference? (Select one to fill in the blank for each month

I would be _____ attending a conference or convention in this month.

(Base: Wave 40 data. Respondents who have traveled for a convention/conference in the last 2 years, 364 completed surveys. Data collected December 11-13, 2020)



Convention Travelers' In-Person vs. Hybrid Meetings Preference

In our many recent interviews of meeting planners, it looks like hybrid events will be a norm in 2021.

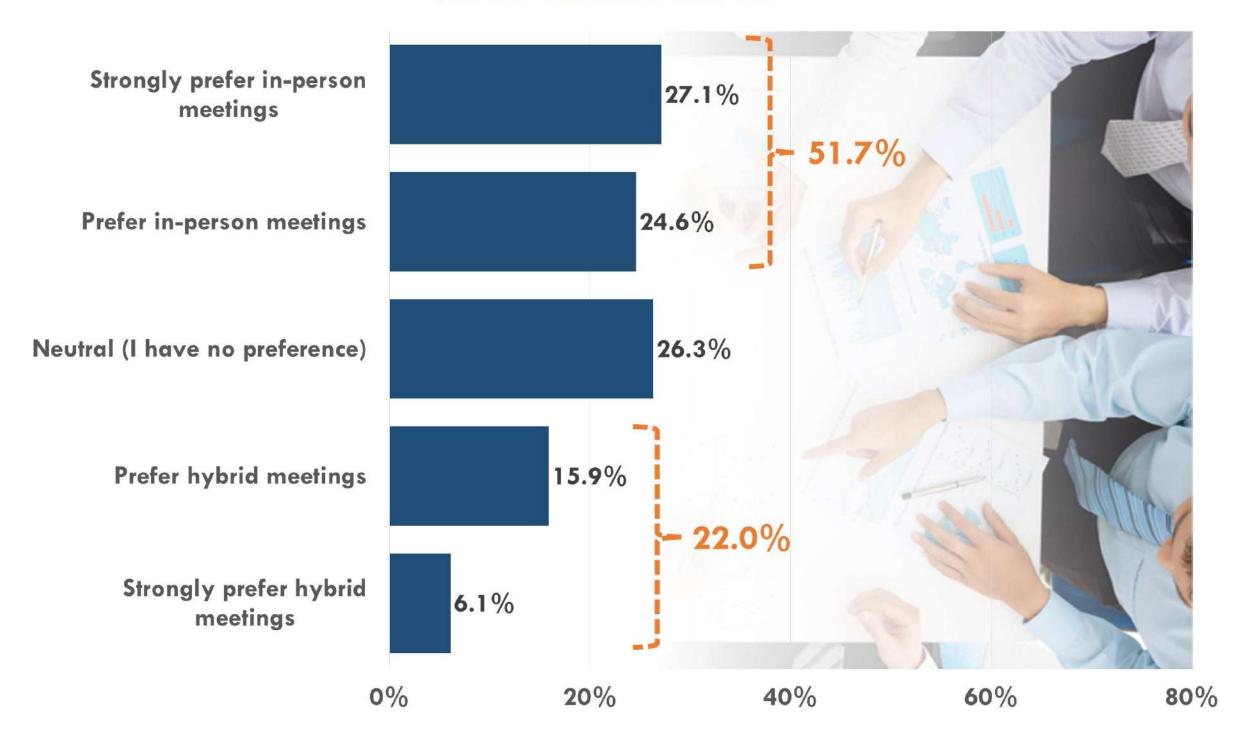
It is also important to track the level of threat virtual events pose to the recovery of the convention industry.

Fortunately, among those who have traveled for conventions in the last two years, 51.7% say they prefer in-person events. Yet, greater than one in five of these travelers (22.0%) say they prefer hybrid meetings. However, the destination in which a meeting is held could still sway a preference for in-person.

56.7% of convention travelers say that where a convention is held would affect their preference for an in-person versus hybrid meeting.

CONVENTION TRAVELERS' IN-PERSON VS. HYBRID MEETINGS PREFERENCE

AS OF DECEMBER 13TH



Question: If given a choice between in-person and hybrid meetings, which would you generally prefer? (Select one)

(Base: Wave 40 data. Respondents who have traveled for a convention/conference in the last 2 years, 364 completed surveys. Data collected December 11-13, 2020)







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

What is a Predictive Index?



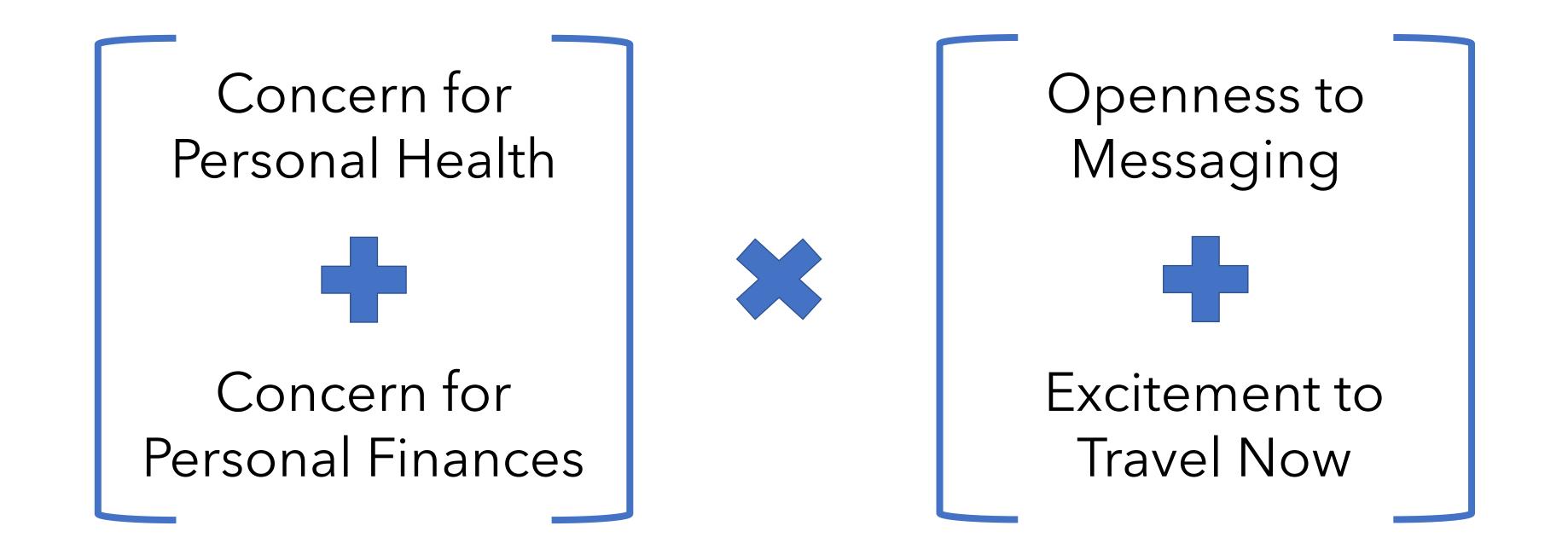
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make datadriven predictions.



The goals are to identify:

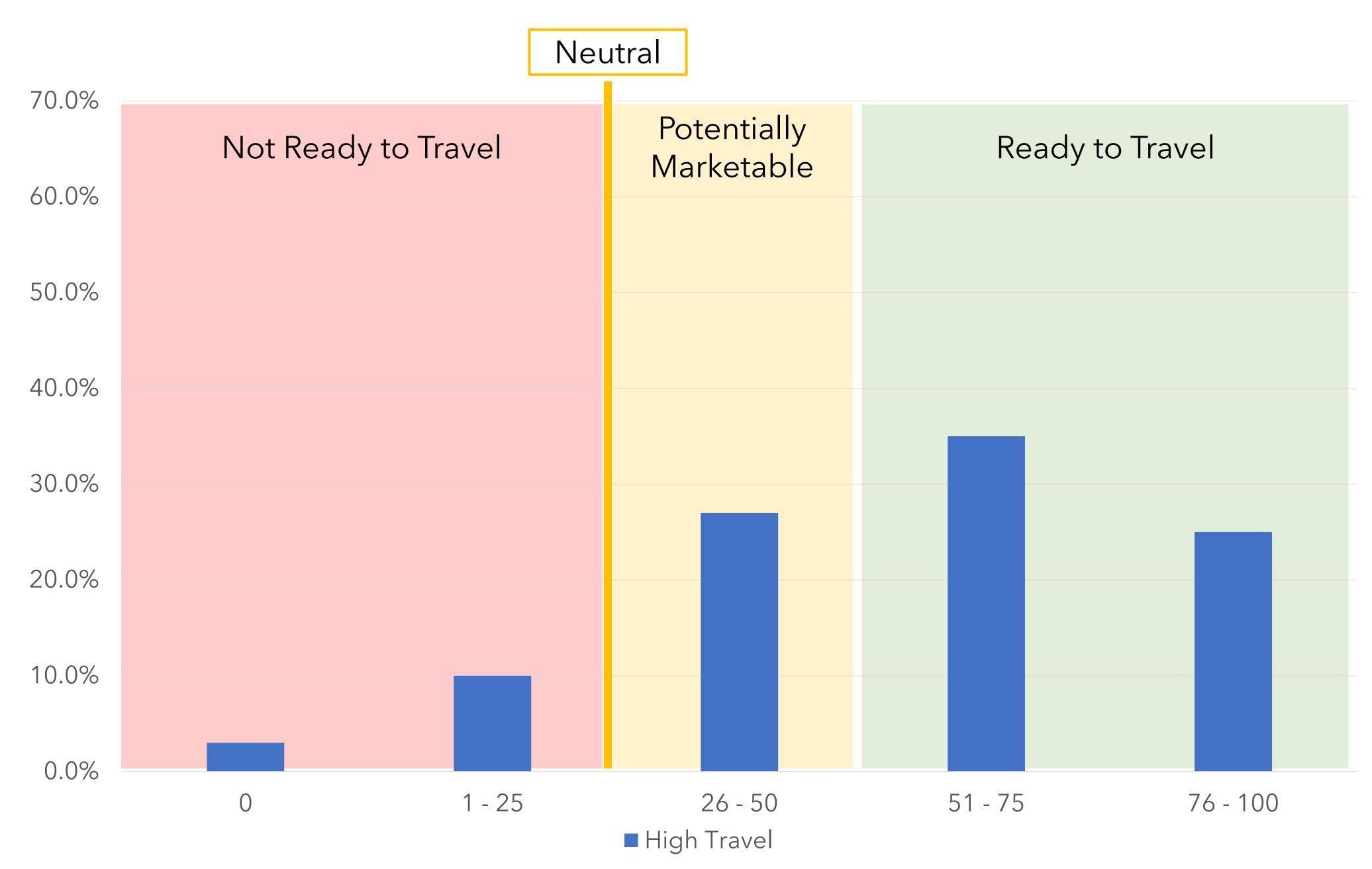
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

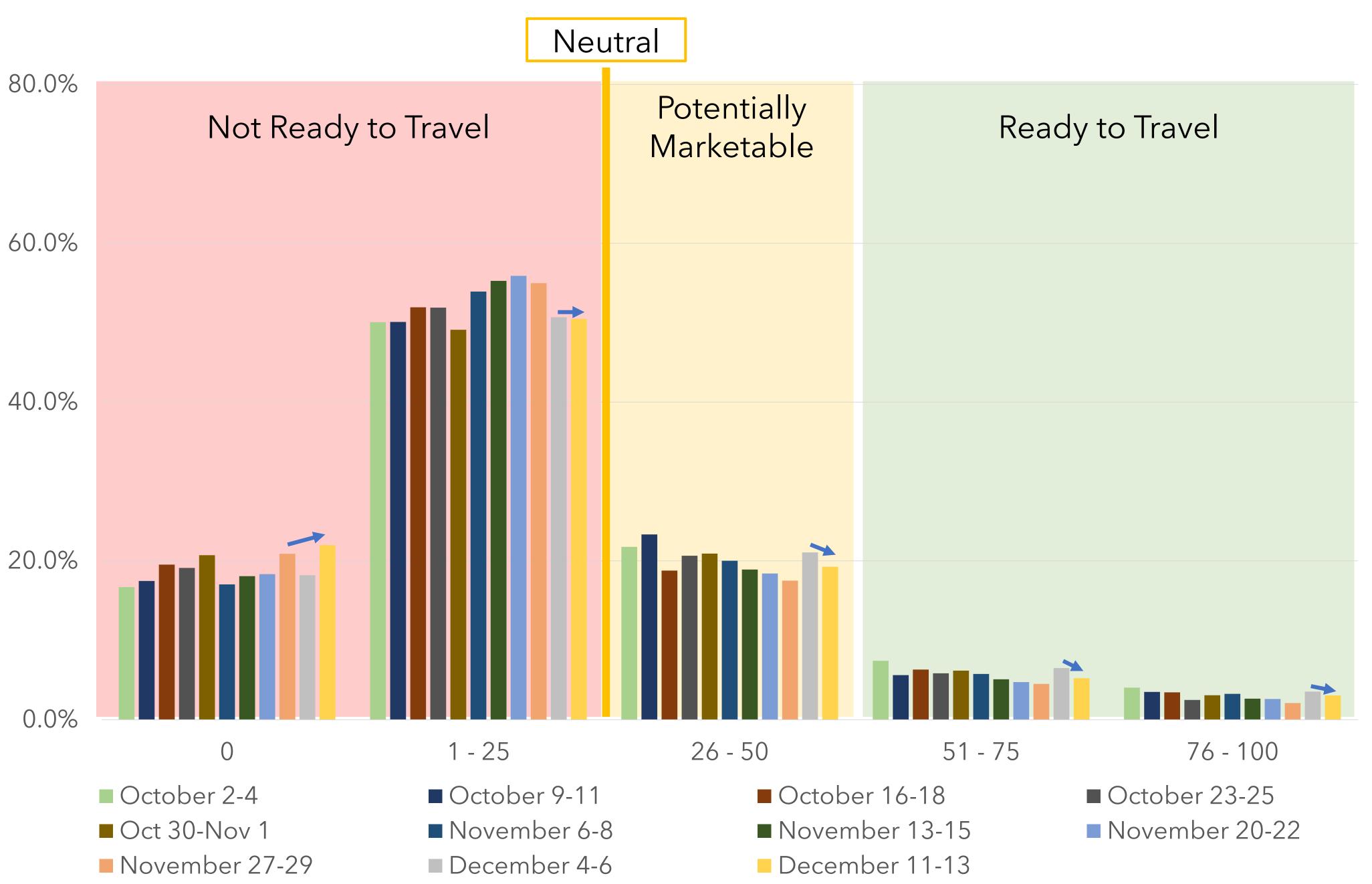


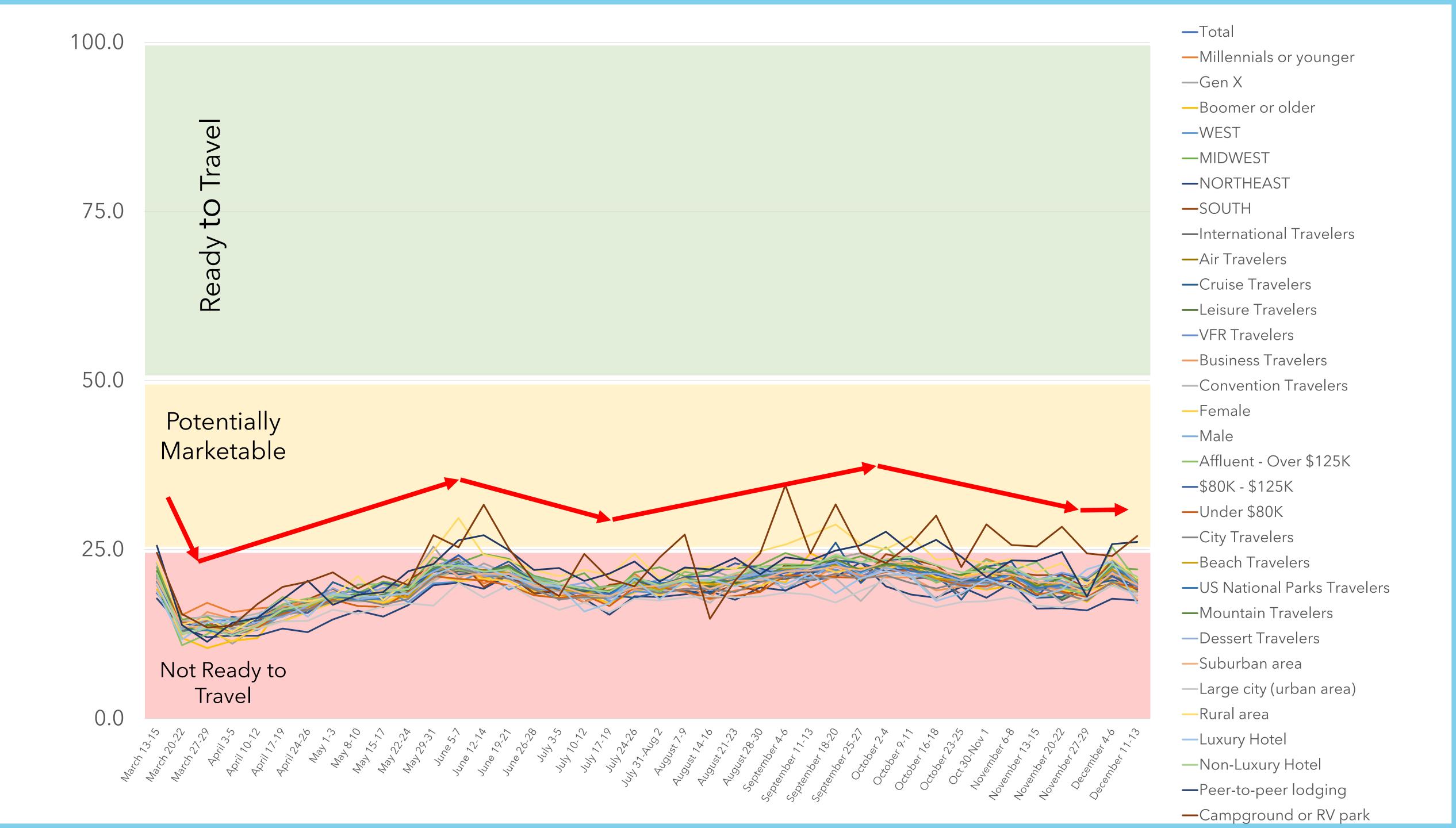
*Normalized to a 100pt scale

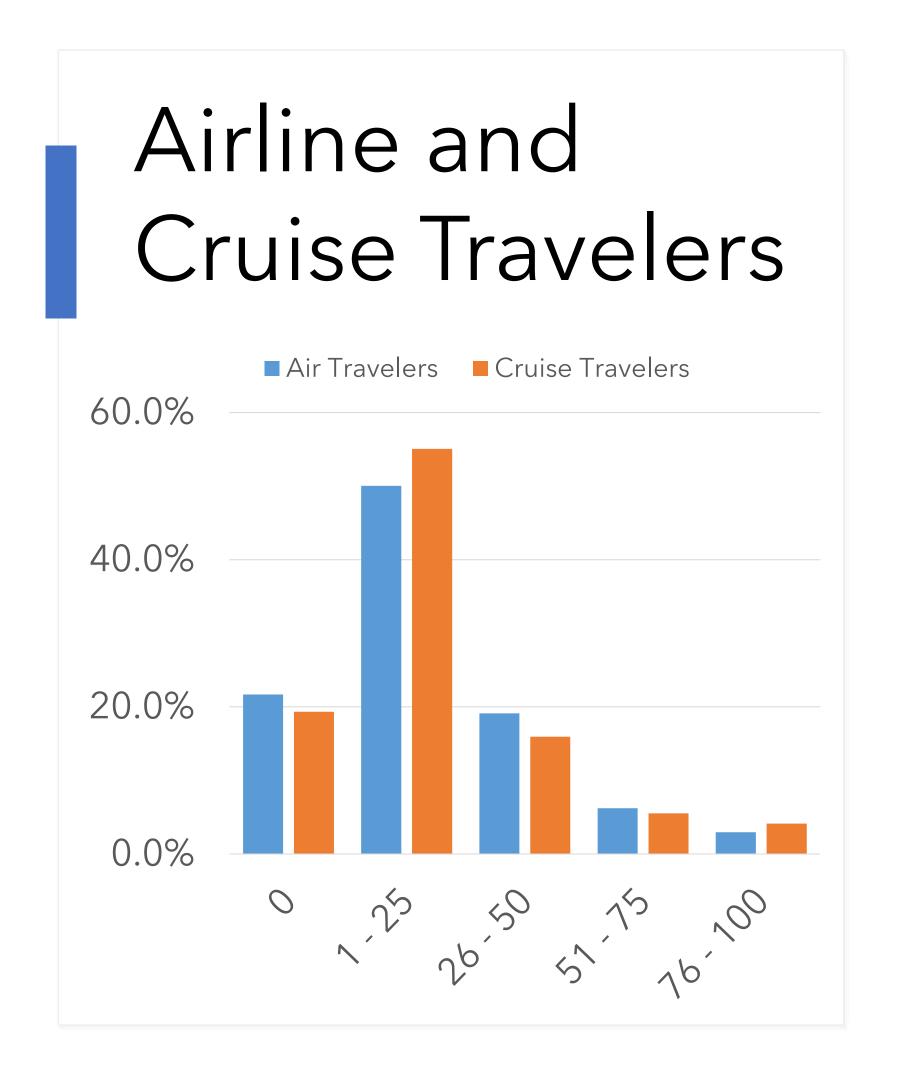
Healthy Travel Outlook

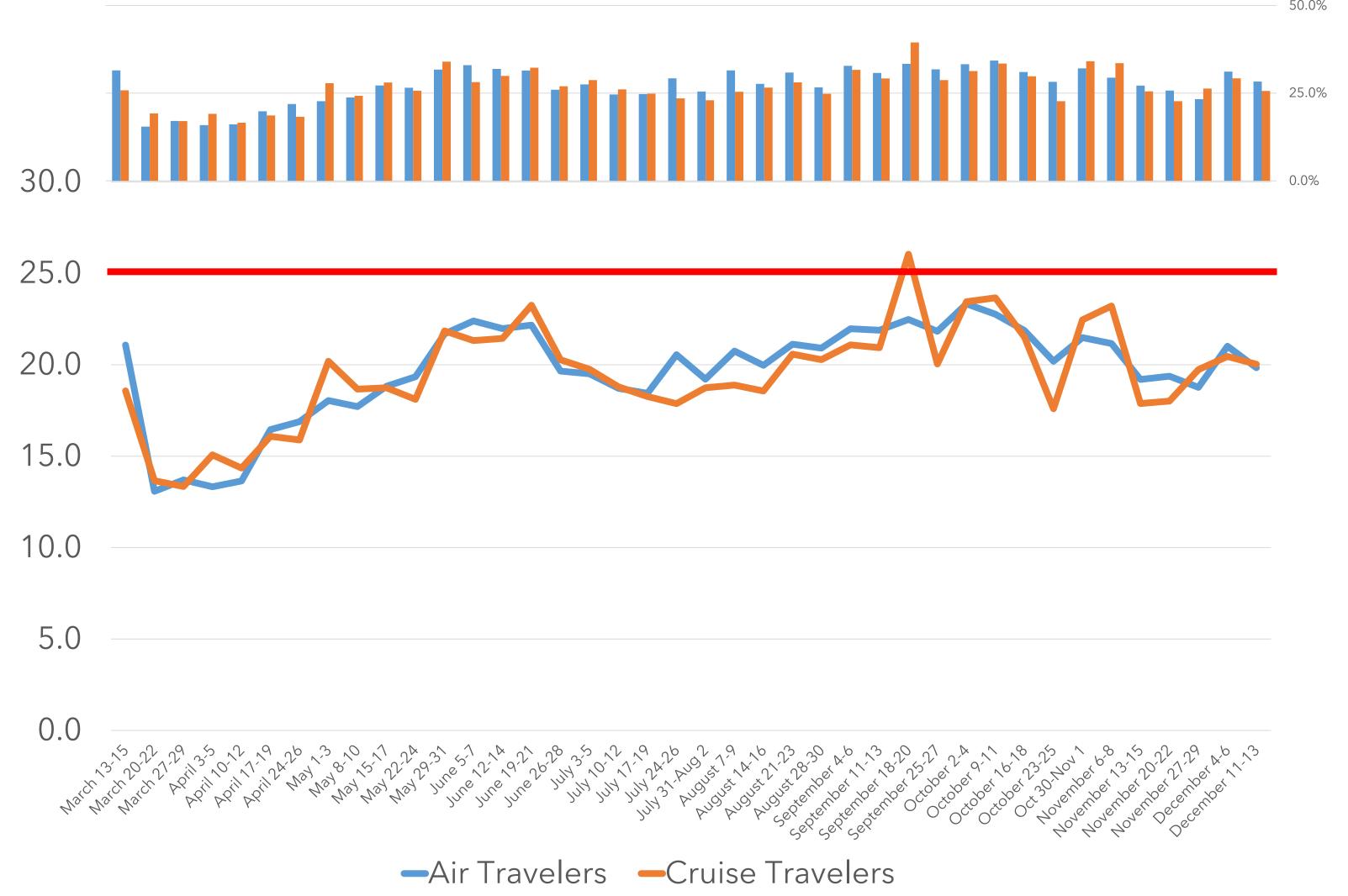


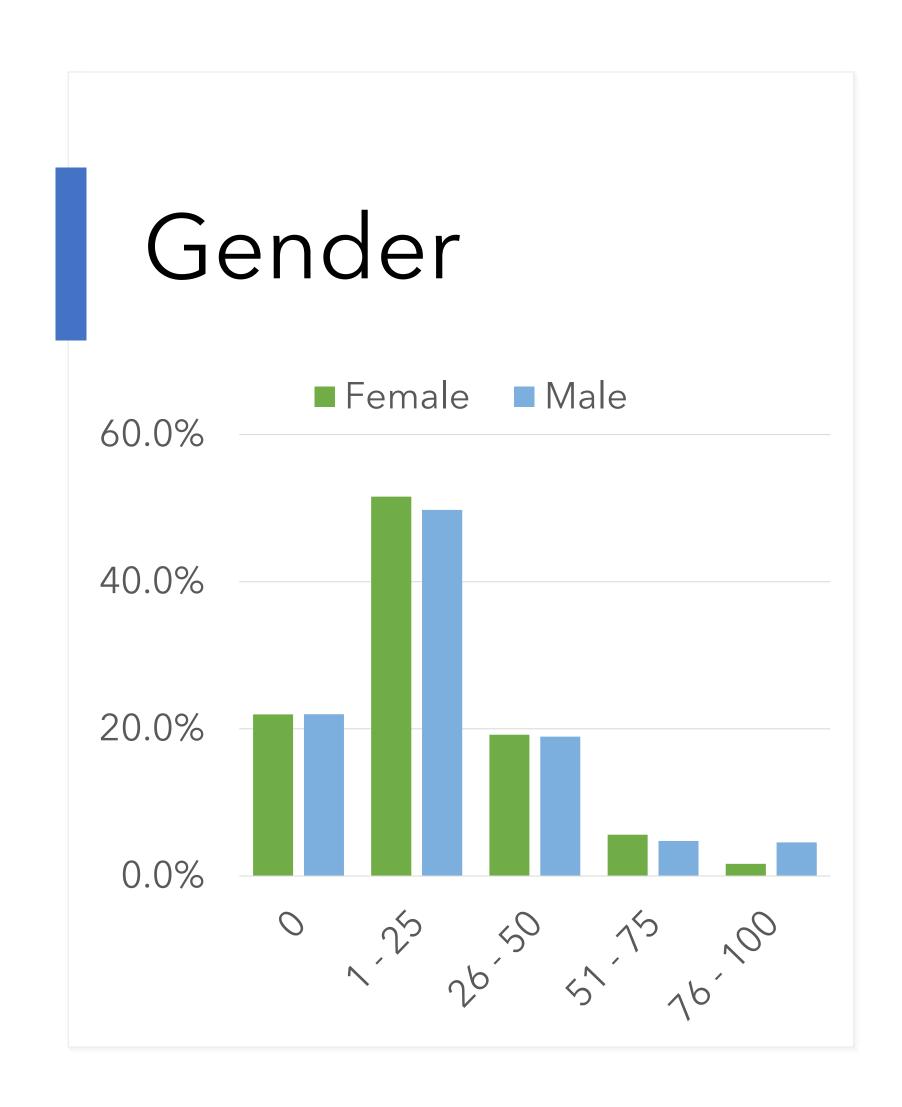
Travel Outlook

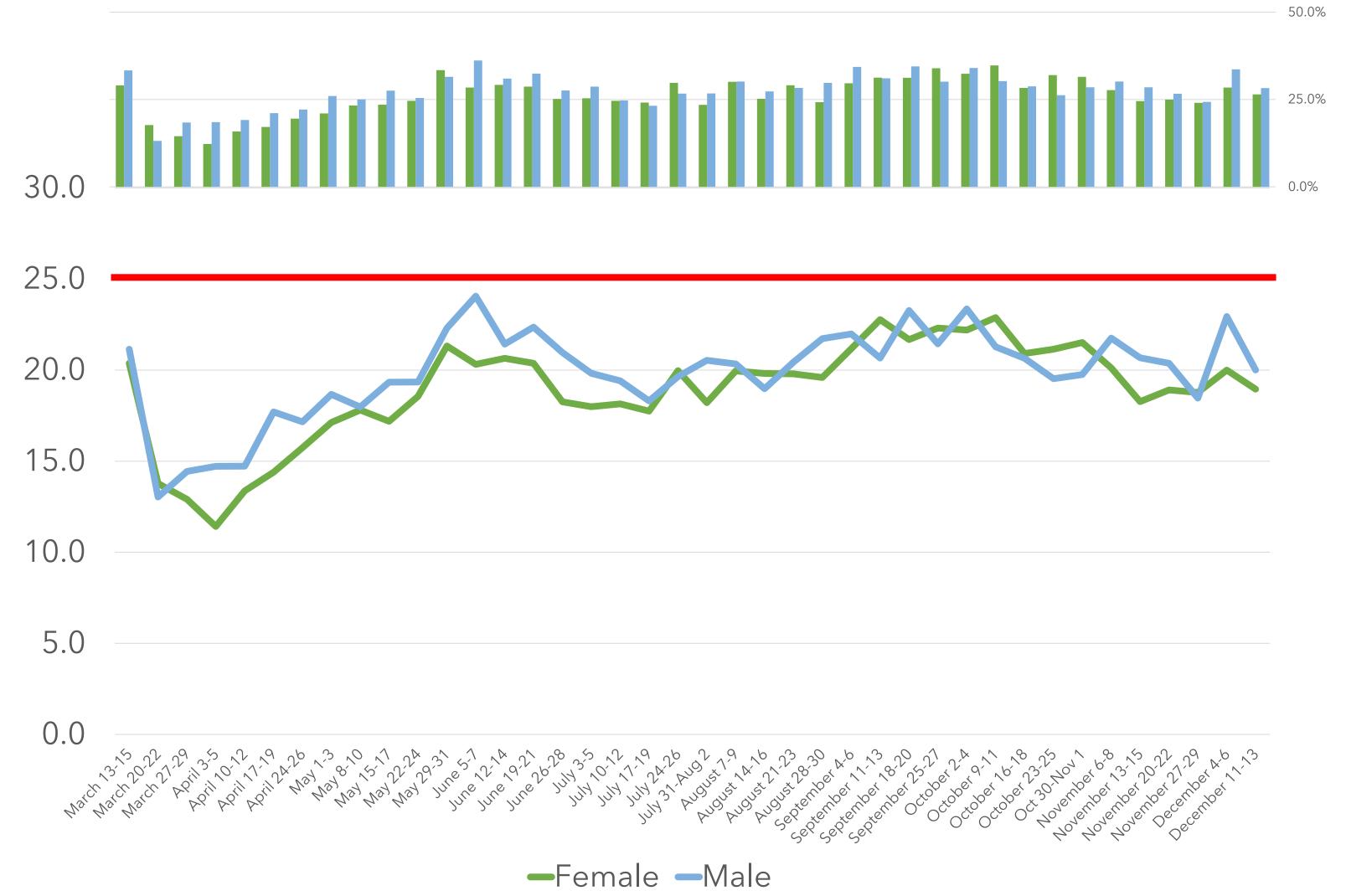


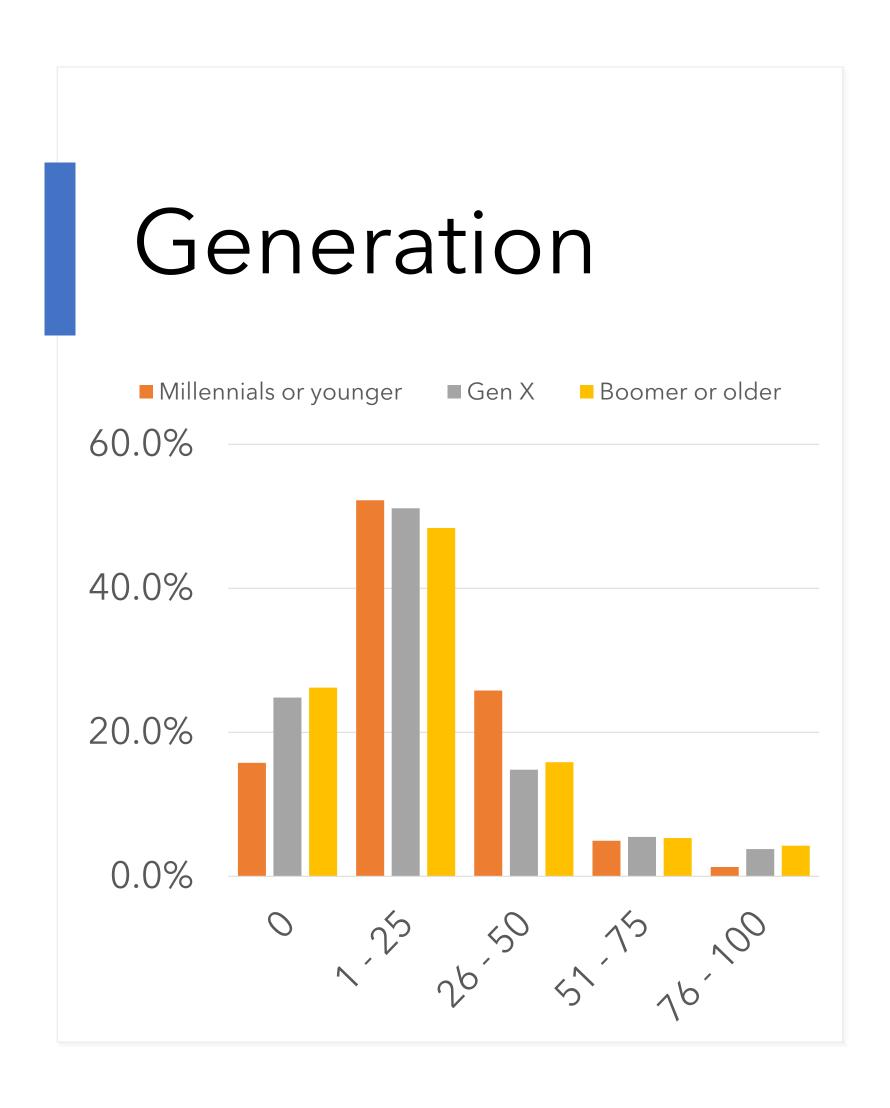


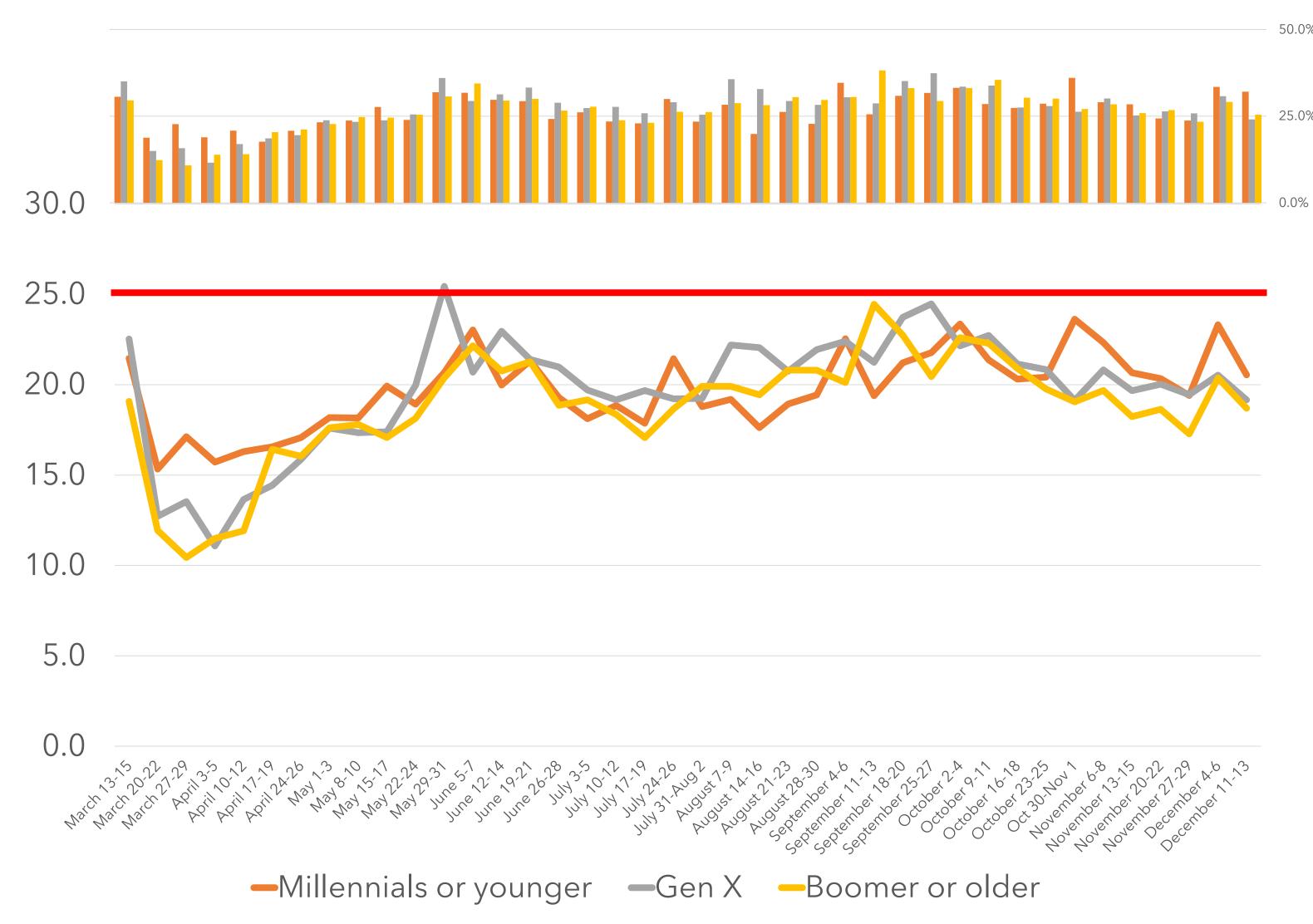


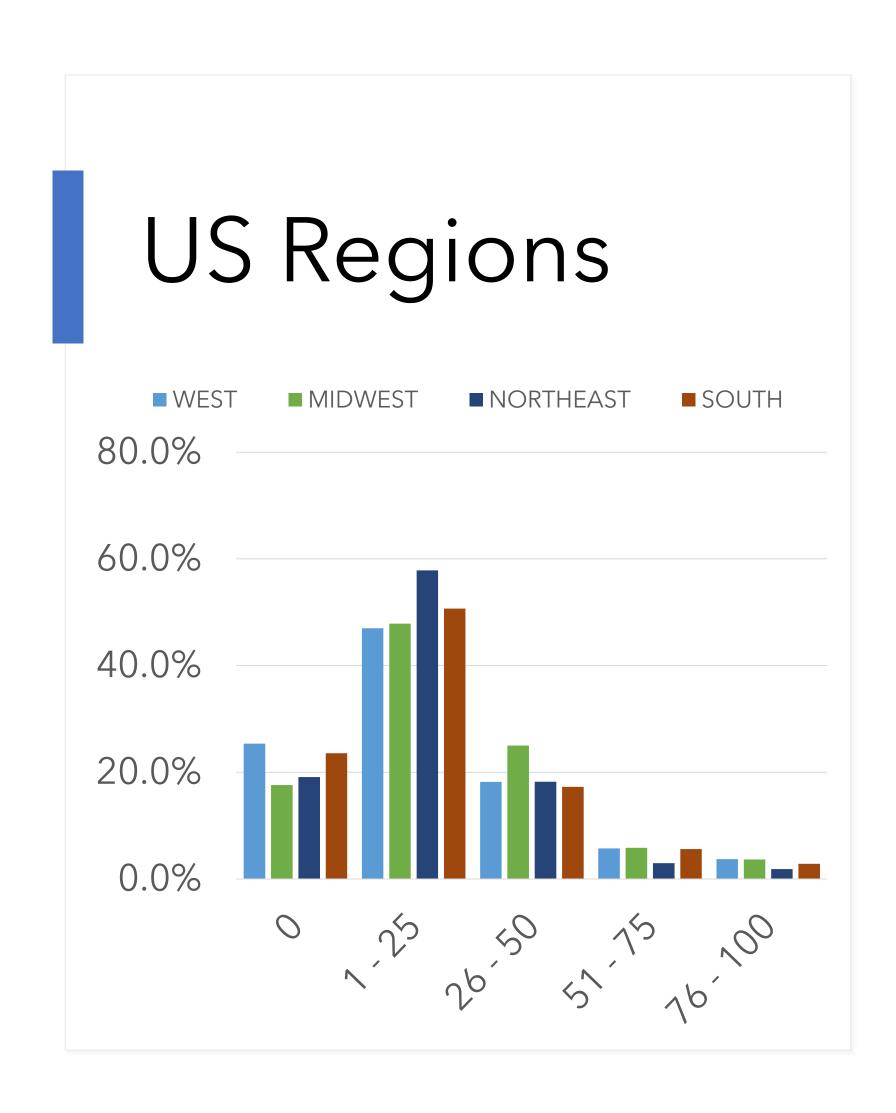


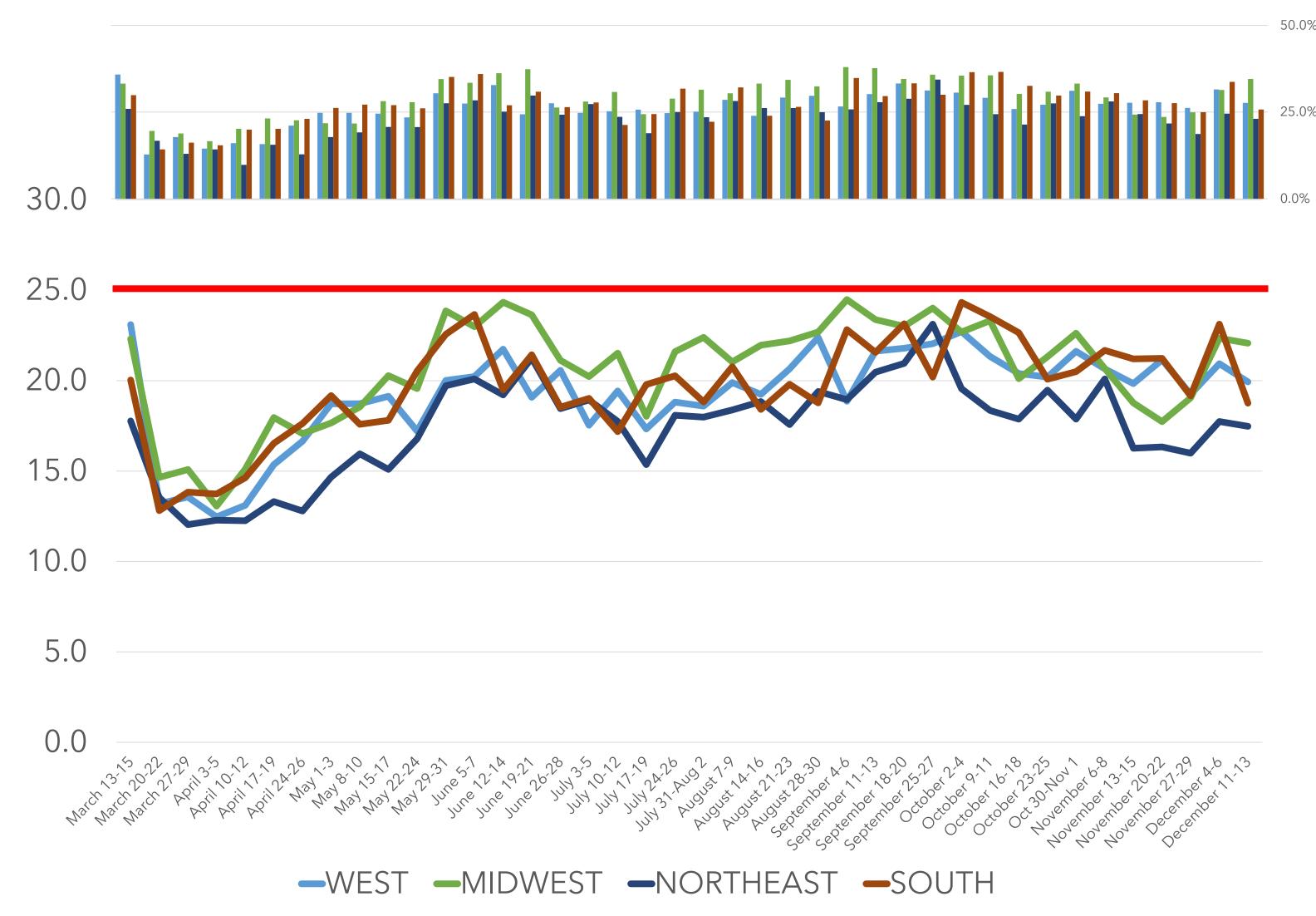


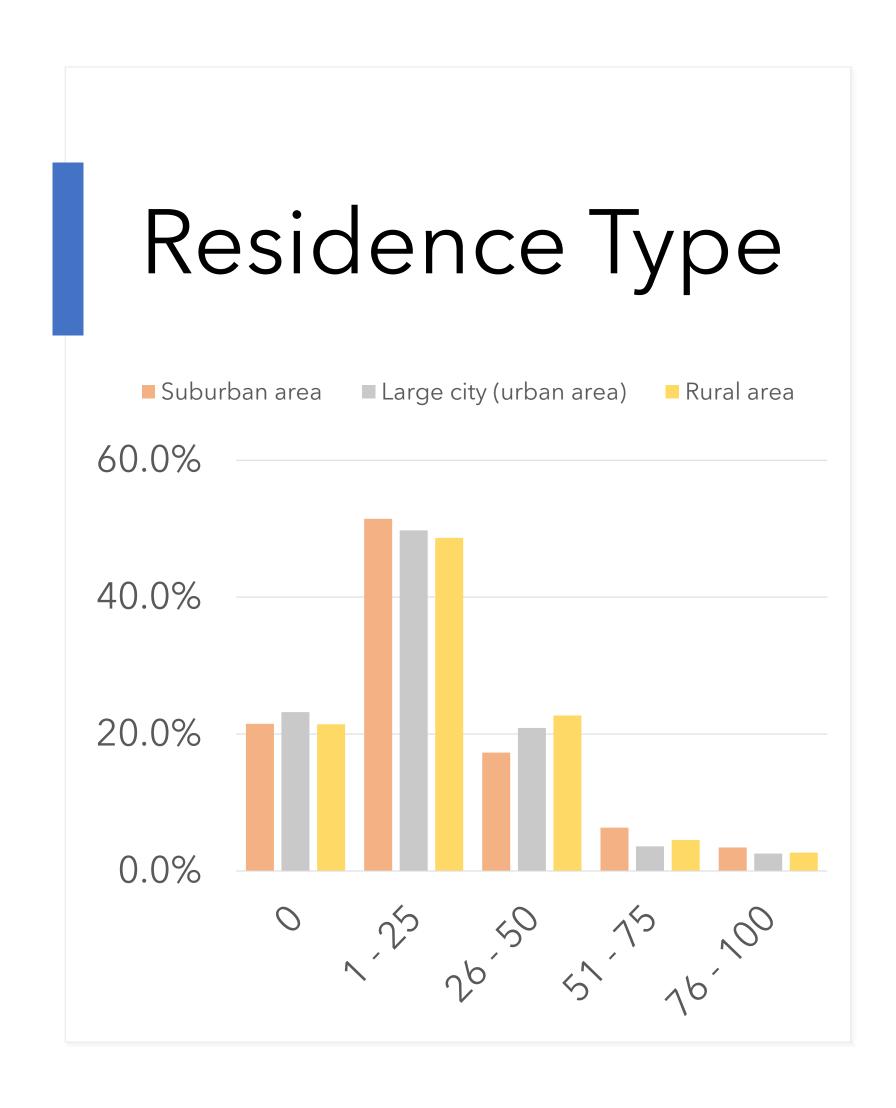


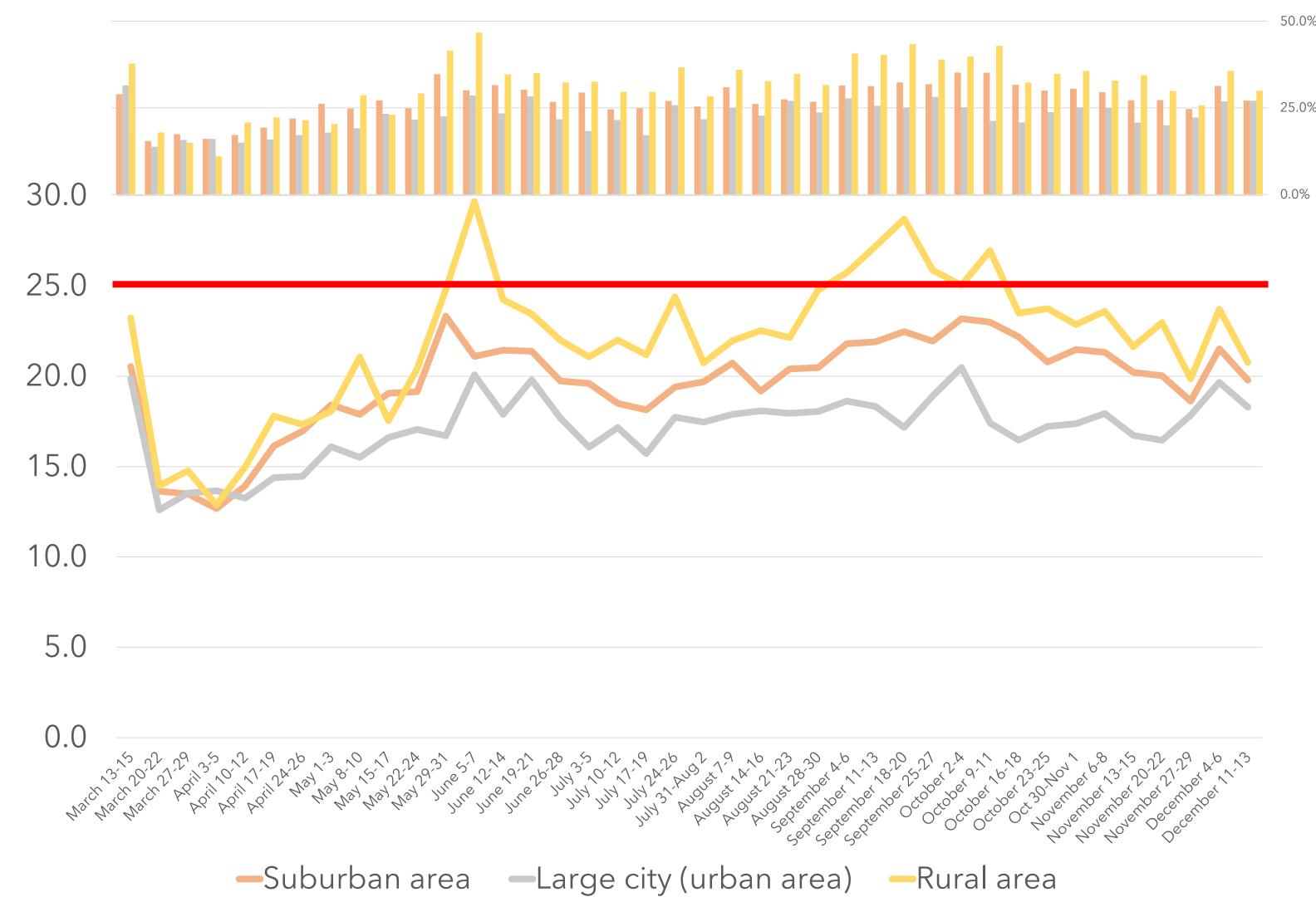


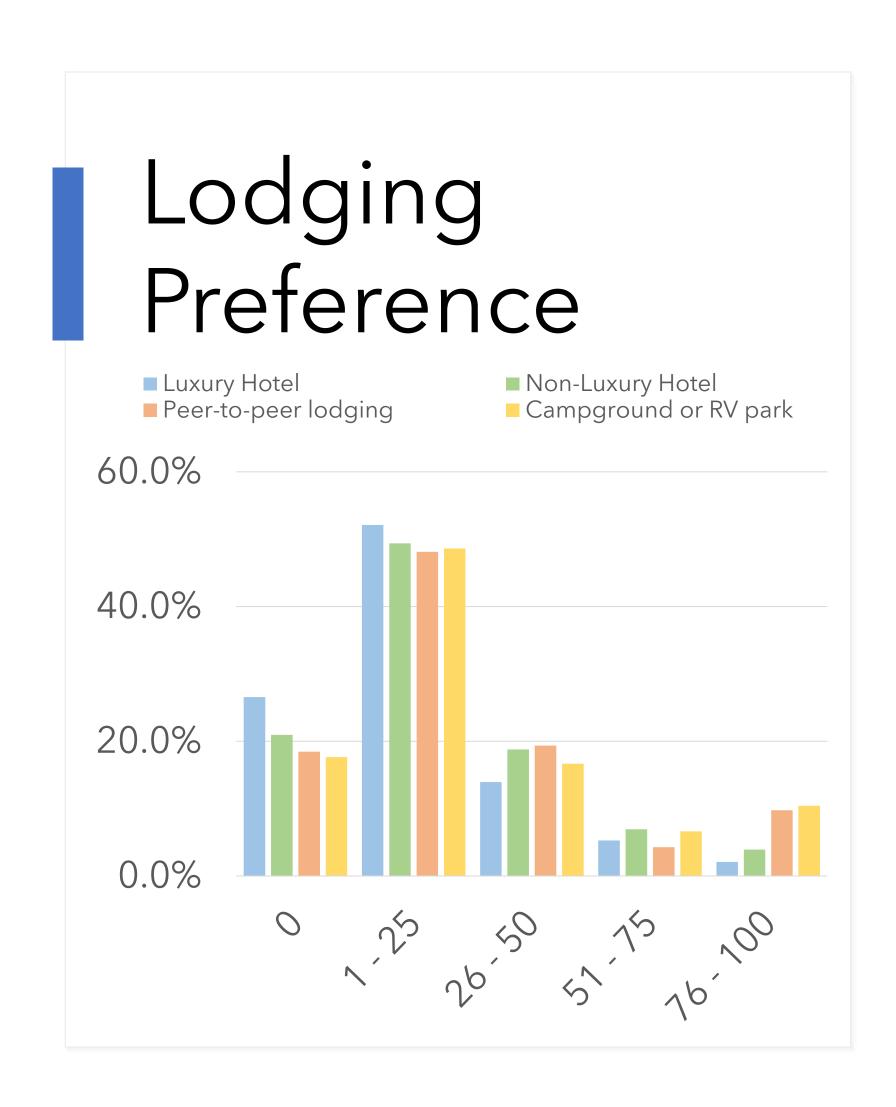


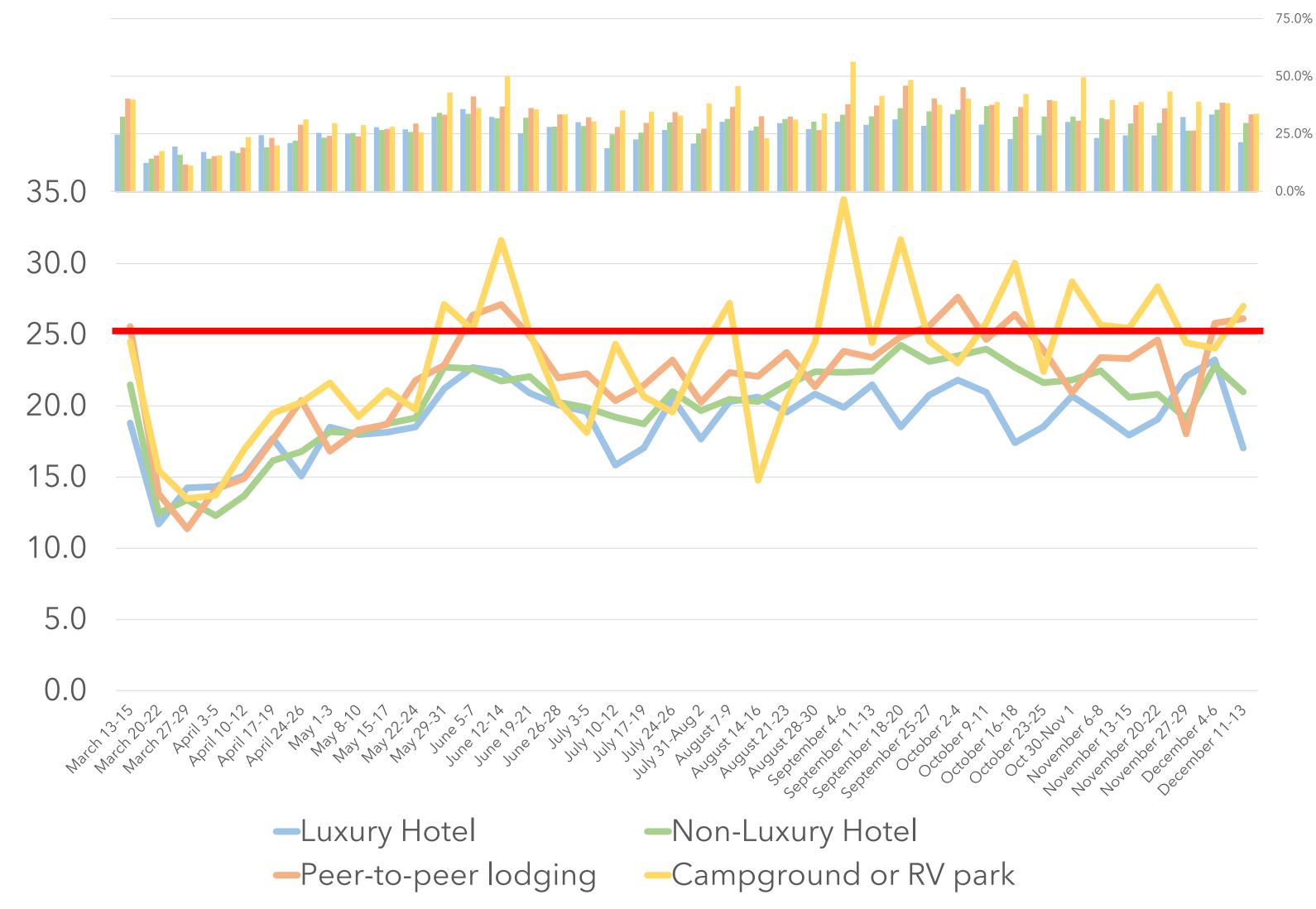














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 Our full hub of insights is available at https://www.destinationanalysts.com/covid-19-insights/





We Can Help You

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Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

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