

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF DECEMBER 21st, 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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Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week we will be joined by a panel of GenZ-age travelers. With their increasing impact on the travel economy, their habits and tastes significantly defining marketing strategies, and the long travel life ahead of them, we will learn about what they anticipate for 2021 and what motivates them to book.

**Sign up to attend the webinar on
Tuesday, December 22nd at 11:00am ET [here](#).**

Key Findings for the Week of December 21st

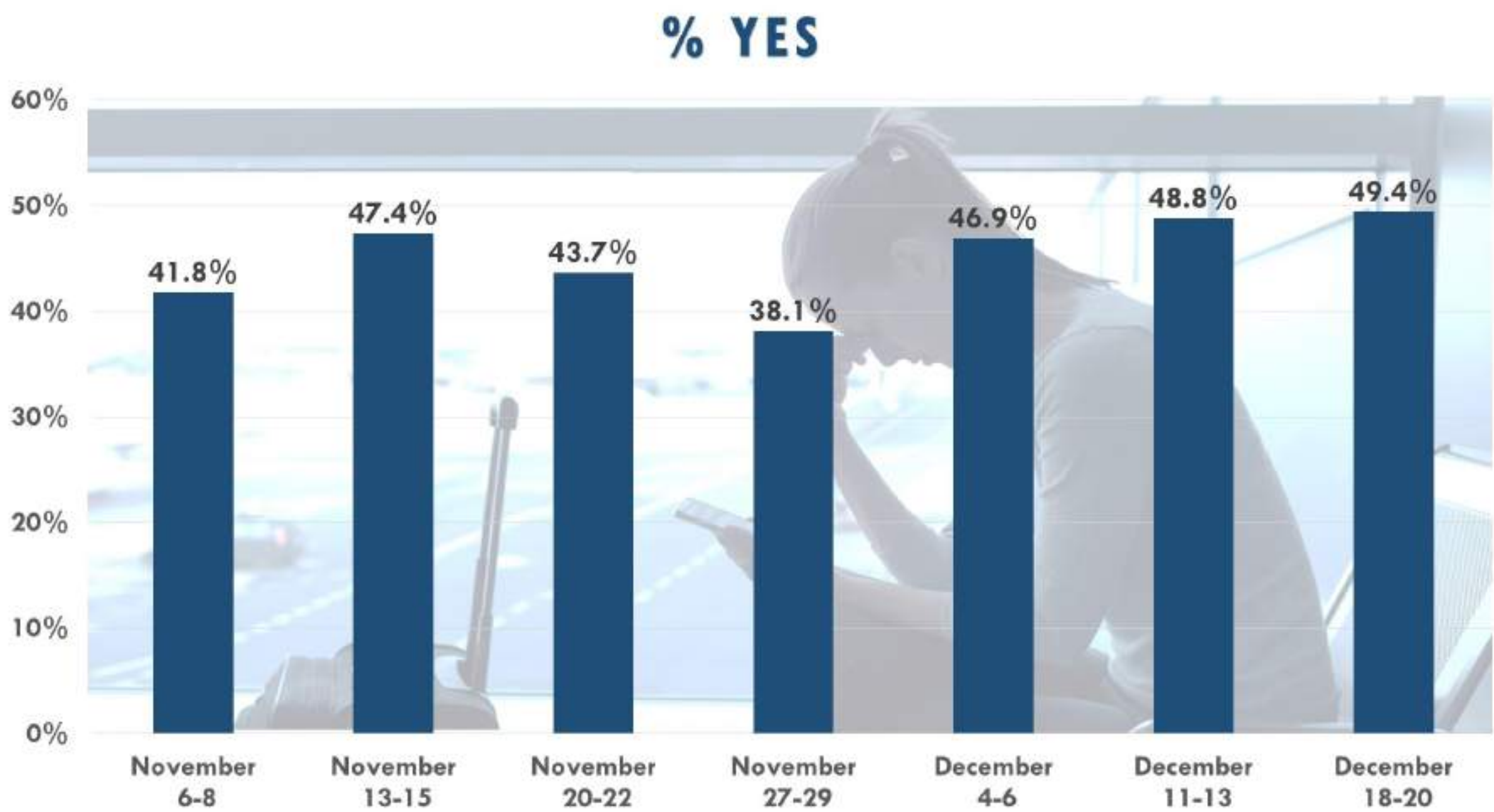
Please cite **Destination Analysts** when using or distributing this data

Trips Cancelled or Postponed Due to Recent Coronavirus Surge

As American travelers answered our survey questions this weekend, daily new coronavirus cases reached nearly a quarter million in the United States.

Thus, after a sustained period of skewing towards readiness between August and November, half of American travelers feel their mindset around travel right now is one of hesitation and delay. Only 41.9% feel confident they can travel safely right now, down from a high of 49.7% just two weeks ago. Over half of American travelers continue to say they would feel guilty traveling now and fully 60.0% wouldn't be able to fully enjoy it if they did. A majority feel traveling on a commercial airline is unsafe (57.5%), while 42.0% feel similarly about staying in a hotel and 49.9% believe staying in an AirBnB or home rental is also unsafe. **Nearing half of American travelers (49.4%) report they have cancelled or postponed an upcoming trip specifically due this current surge in COVID cases. The greatest leap in cancellations and postponements caused by this increased outbreak occurred after the Thanksgiving holiday (when the percent jumped from 38.1% to 46.9%), but has incrementally grown each week since.**

TRIPS CANCELLED OR POSTPONED DUE TO RECENT CORONAVIRUS SURGE AS OF DECEMBER 20TH



Question: Have you cancelled or postponed any upcoming leisure trips because of the recent increase in COVID-19 cases seen around the United States?

(Base: Waves 35-41 data. All respondents, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206 and 1,201 completed surveys.)

Christmas Travel in 2020

As AAA and other sources are also predicting, Christmas travel will be down significantly from 2019, when nearly one-third of American travelers took a Christmas holiday trip.

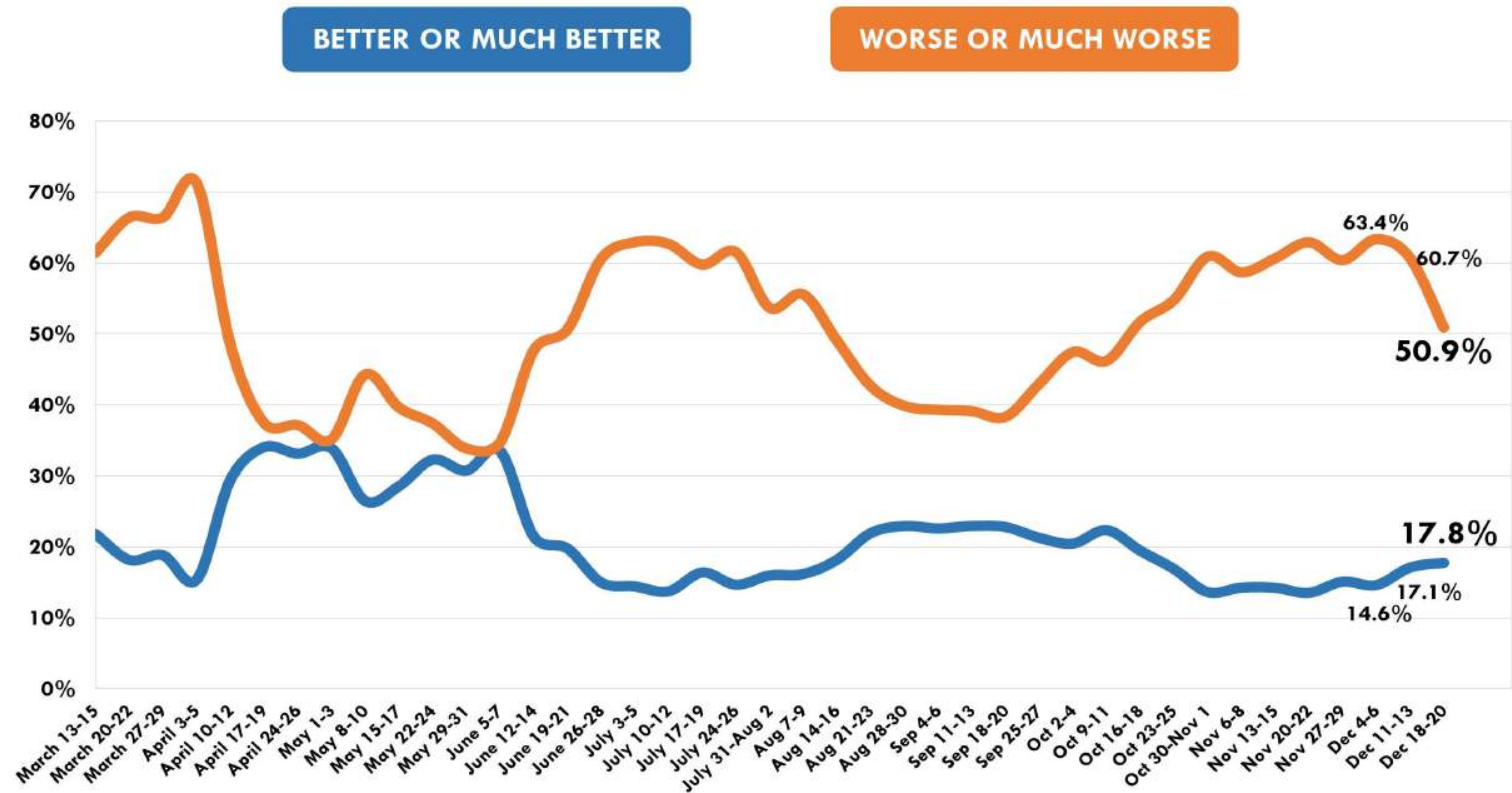
This week, just 17.4% of American travelers say they will take a trip for the holiday, with 6.9% still unsure. Cancellations of a Christmas trip due to the pandemic were reported by 28.5%, and 45.3% say they have friends or family who would normally travel for the holiday but are not this year. For those who are traveling for Christmas, being with friends and family is, of course, the most common primary reason for their trip, but nearly half say they are also driven by taking a vacation/getaway. While staying in the homes of their friends and family is likeliest, hotels and other lodging will certainly see Christmas travelers. The average Christmas trip will be 4.6 days to a destination 597 miles away—although 56.7% will be under 500 miles.



Expectations for the Coronavirus Outbreak

Thankfully, there was further progress on the vaccine front. As Moderna’s vaccine was approved and healthcare workers across the U.S. began receiving the first doses, national anxiety levels about contraction of the coronavirus and its impact on personal finances and the economy all dropped. **Most notably, there was a 10-point drop in the percent of Americans who feel the coronavirus situation will get worse in the next month. Instead, nearly a third feel the situation will stay the same.**

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK MARCH 15 – DECEMBER 20



Question: In the next month, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

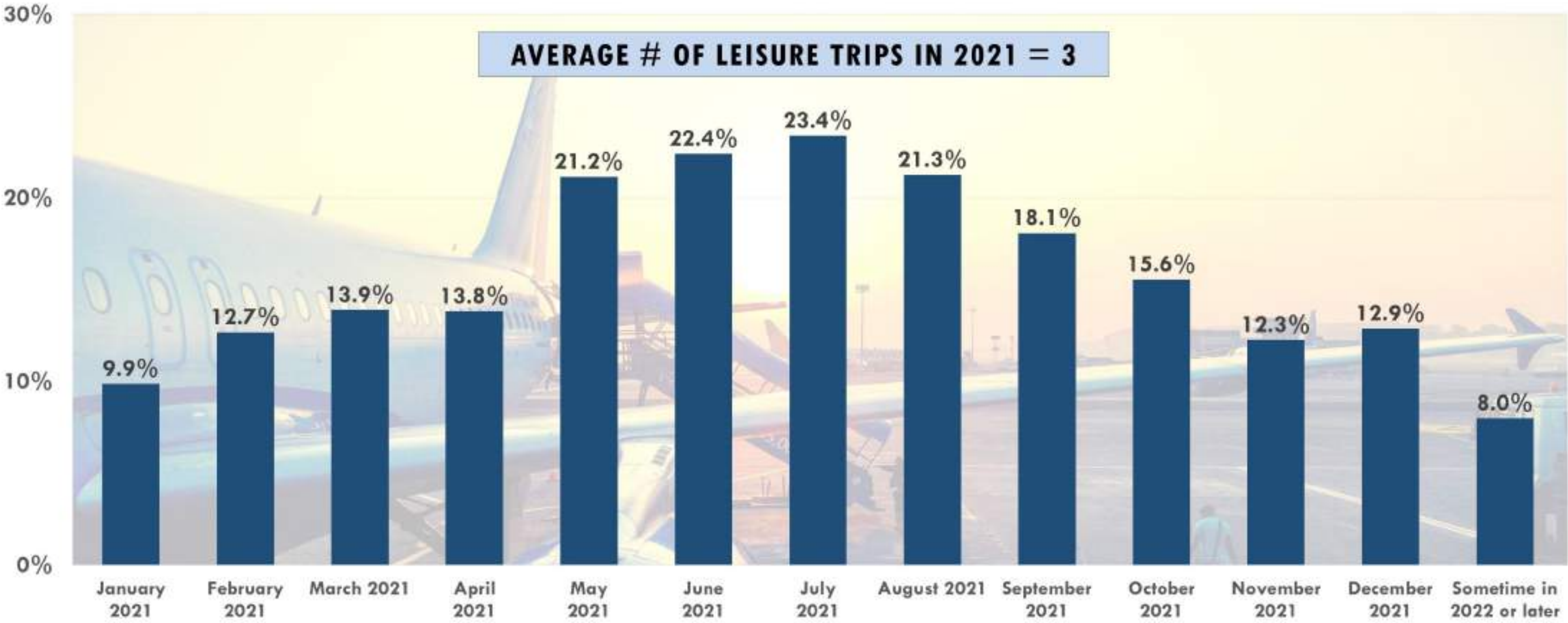
(Base: Waves 1-41. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206 and 1,201 completed surveys.)

Influence on Americans' Travel Sentiment for the Future

The vaccine news appears to continue to have a positive influence on Americans' travel sentiment for the future.

The percent reporting an avoidance of international travel and conventions/conferences are both at 42-week lows (70.9% and 65.0%, respectively). Openness to travel inspiration rebounded to 5.4 on an 11-point scale after dipping to 4.9 three weeks ago. **American travelers are saying they will take an average of 3 leisure trips in 2021. The May-August period looks to be the most common for travel; over 20% say they already have at least tentative trip plans in those months.**

**TIMING OF AMERICANS' UPCOMING TRAVEL PLANS
AS OF DECEMBER 20TH**



Question: Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (Select all that apply)

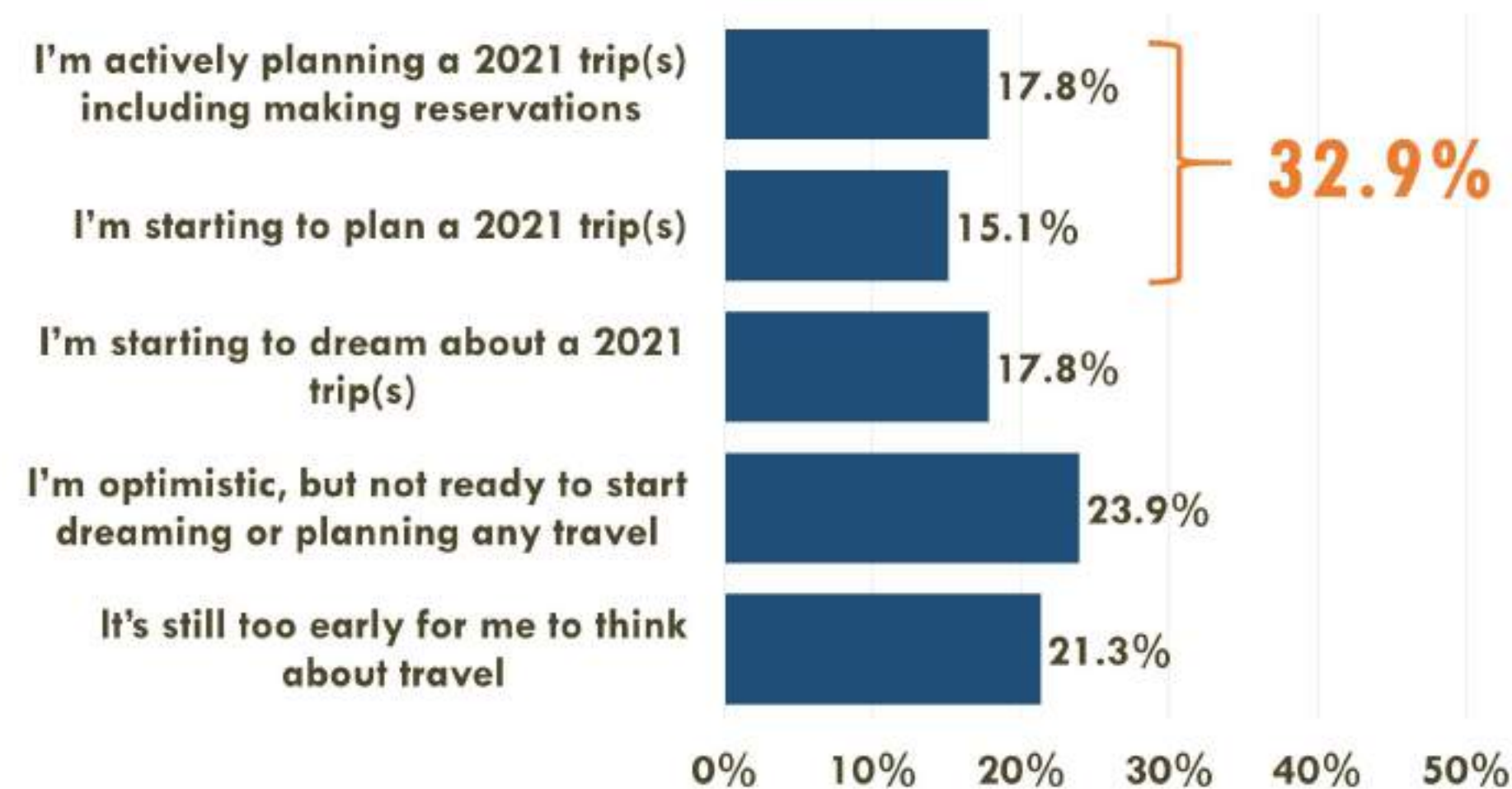
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

Vaccine Distribution Has Begun: The Impact on Travel

Looking more deeply into the impact of the COVID-19 vaccine on travel, 49.6% agree they are not traveling until vaccines are made widely available. Fortunately, Americans are showing a growing agreement to take the vaccine. This week, the majority (51.7%) say they will take one of the recently developed vaccines (up from 39.2% the week of November 7th), and 61.6% feel they are safe. **With the vaccine distribution timeline increasingly clear, 32.9% of Americans are now in the starting or actively planning a trip stage for 2021.** However, the pandemic effects may linger for some time as Americans still express some travel hesitation, even with the vaccines. When asked to describe how they are going to approach getting back into travel in the period immediately after vaccines become widely available to the public, three quarters of American travelers say that they will get back carefully (37.2%) or test the waters first (37.0%).

VACCINE DISTRIBUTION HAS BEGUN: THE IMPACT ON TRAVEL AS OF DECEMBER 20TH

TRAVEL PLANNING & DREAMING FOR 2021



Question: With the first COVID-19 vaccine now being distributed in the U.S., which best describes your feelings about travel in 2021?

(Base: Wave 41. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

FEELINGS ABOUT TRAVEL



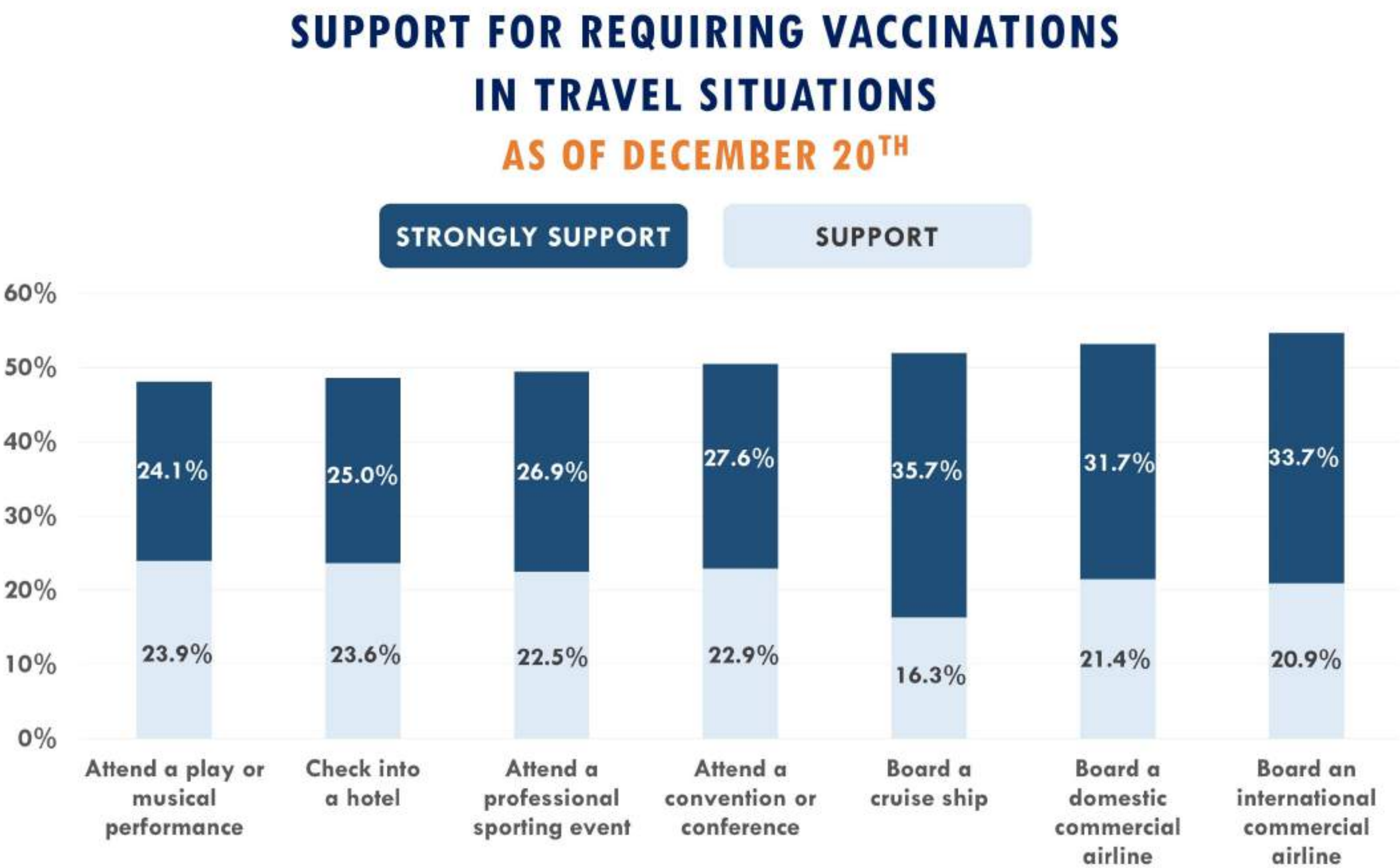
Question: What one word best describes how you feel about travel now that vaccines are becoming available?
(Unaided)

(Base: Wave 41. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

Support for Requiring Vaccinations in Travel Situations

Now that the COVID-19 vaccine is here, new questions about vaccine requirements inevitably arise.

There is the strongest support among American travelers for vaccine requirements for boarding flights and cruise ships. Although there is lesser agreement for vaccine requirements for conventions, hotel stays, sports and other live events, support among Americans right now approaches half.



Question: Imagine that proof of having taken a COVID-19 vaccine is required to do each of the following travel activities.

Use the scale below to indicate how you would feel about this requirement. (Select one for each to complete this sentence)

I would _____ requiring vaccination for this.

(Base: Wave 41 data. All respondents. 1,201 completed surveys. Data collected Dec 18-20, 2020)



Coronavirus Travel Sentiment Index

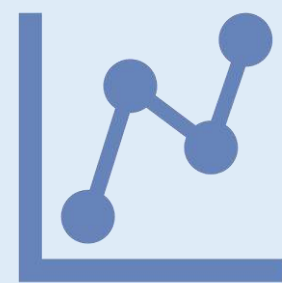
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of December 21st

What is a Predictive Index?



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



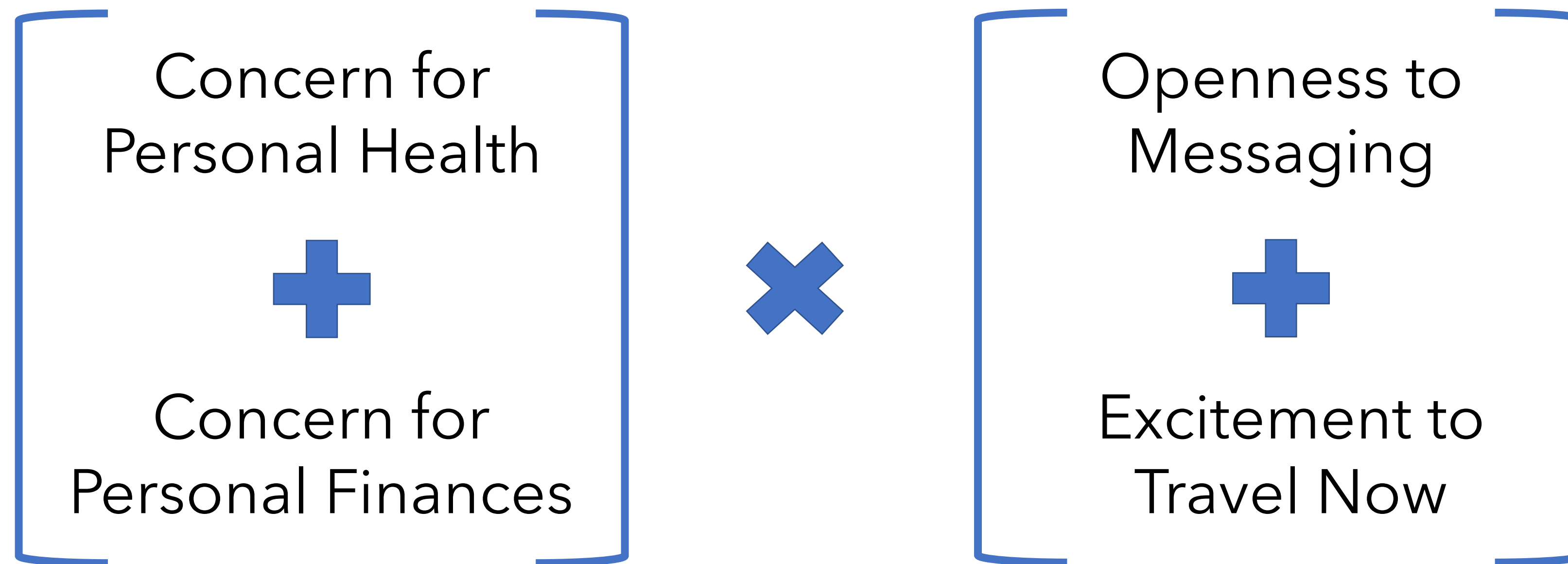
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

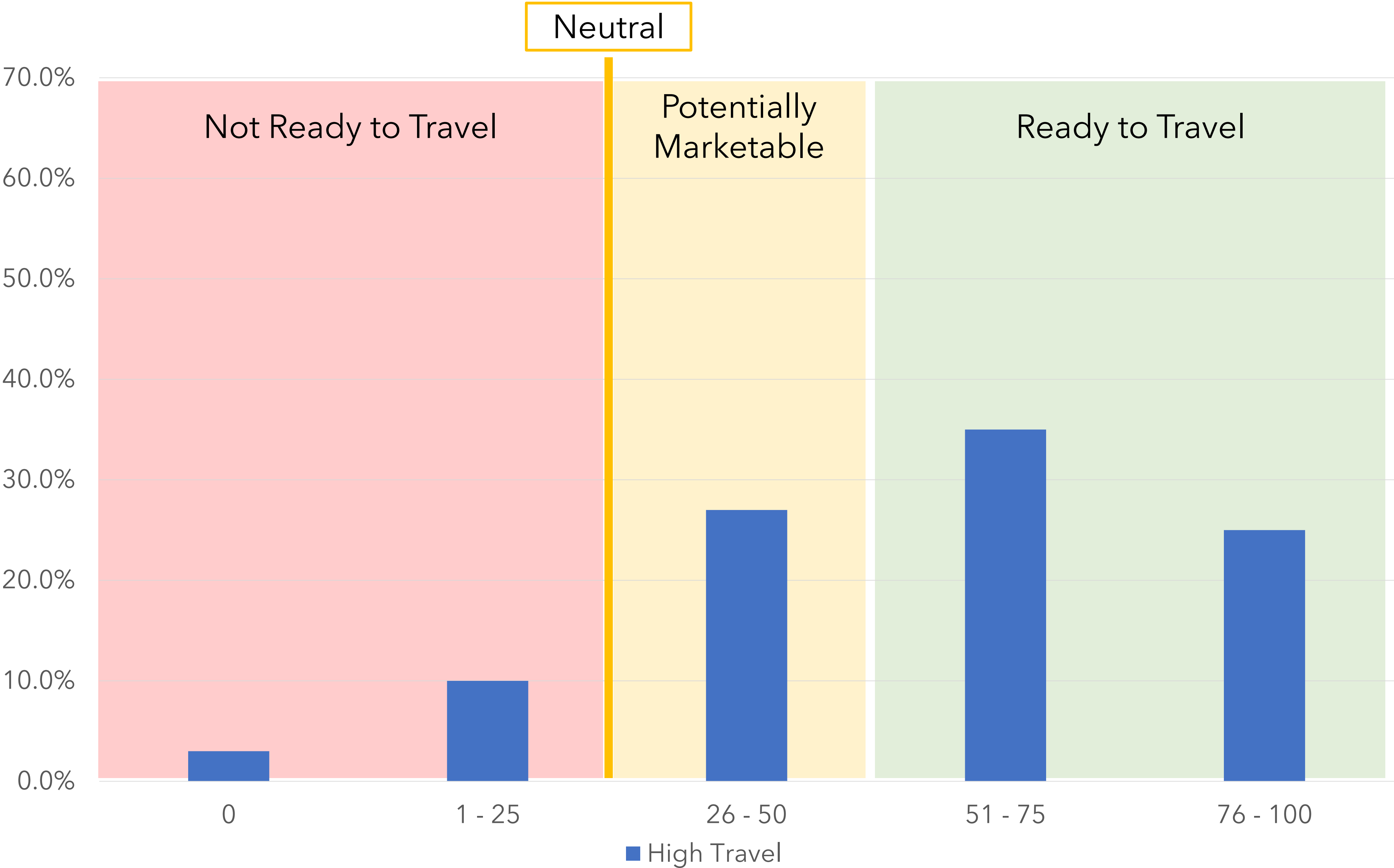
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



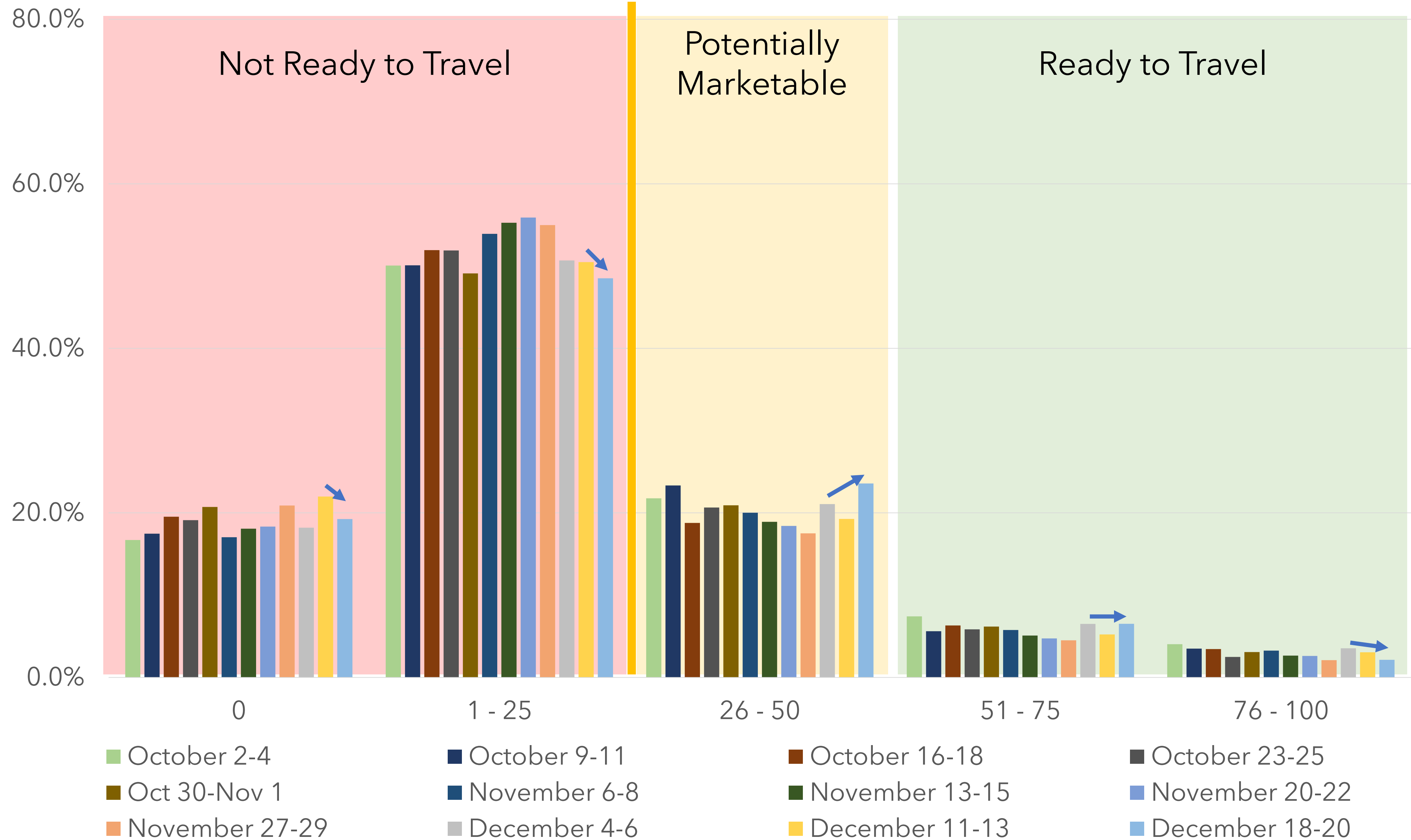
*Normalized to a 100pt scale

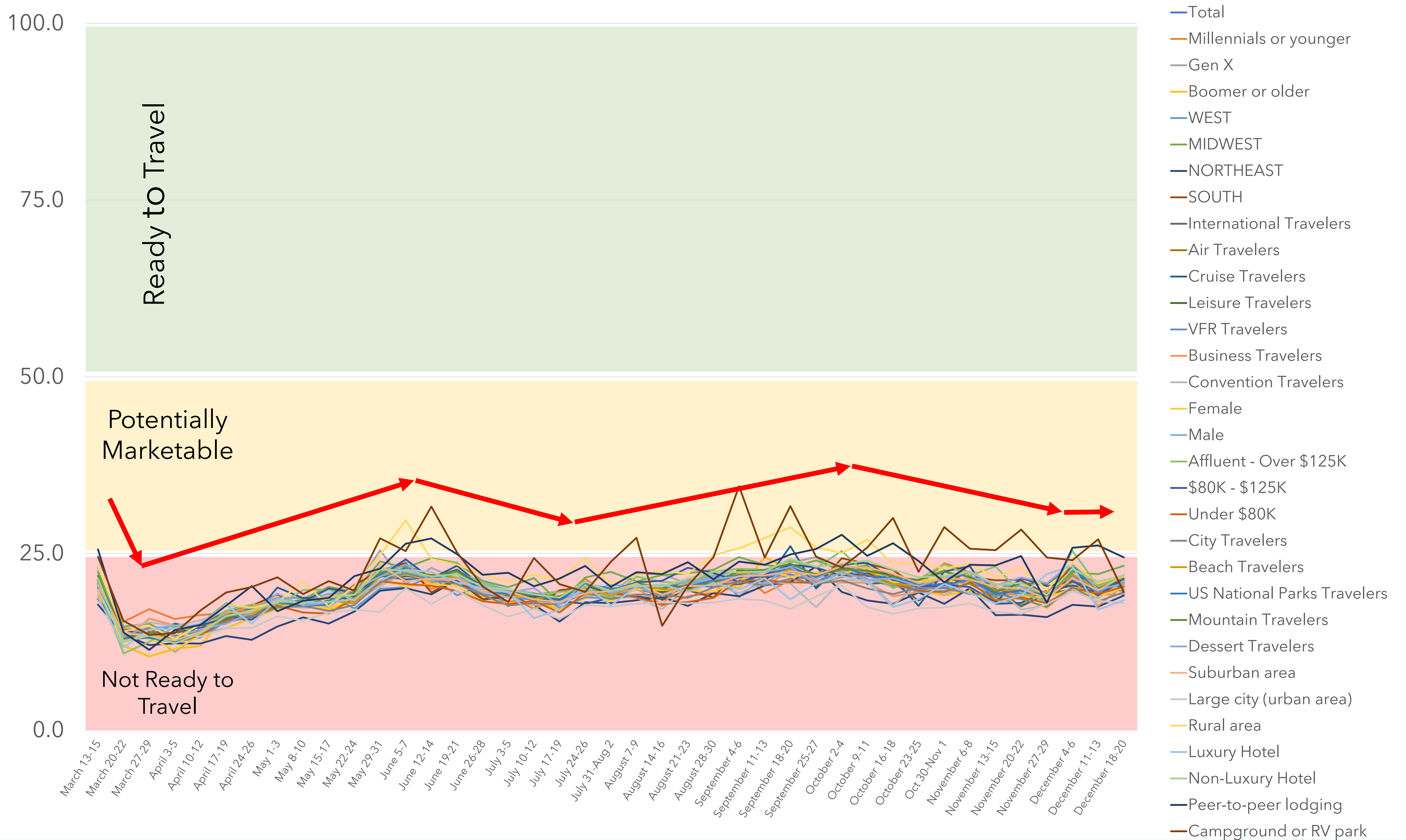
Healthy Travel Outlook

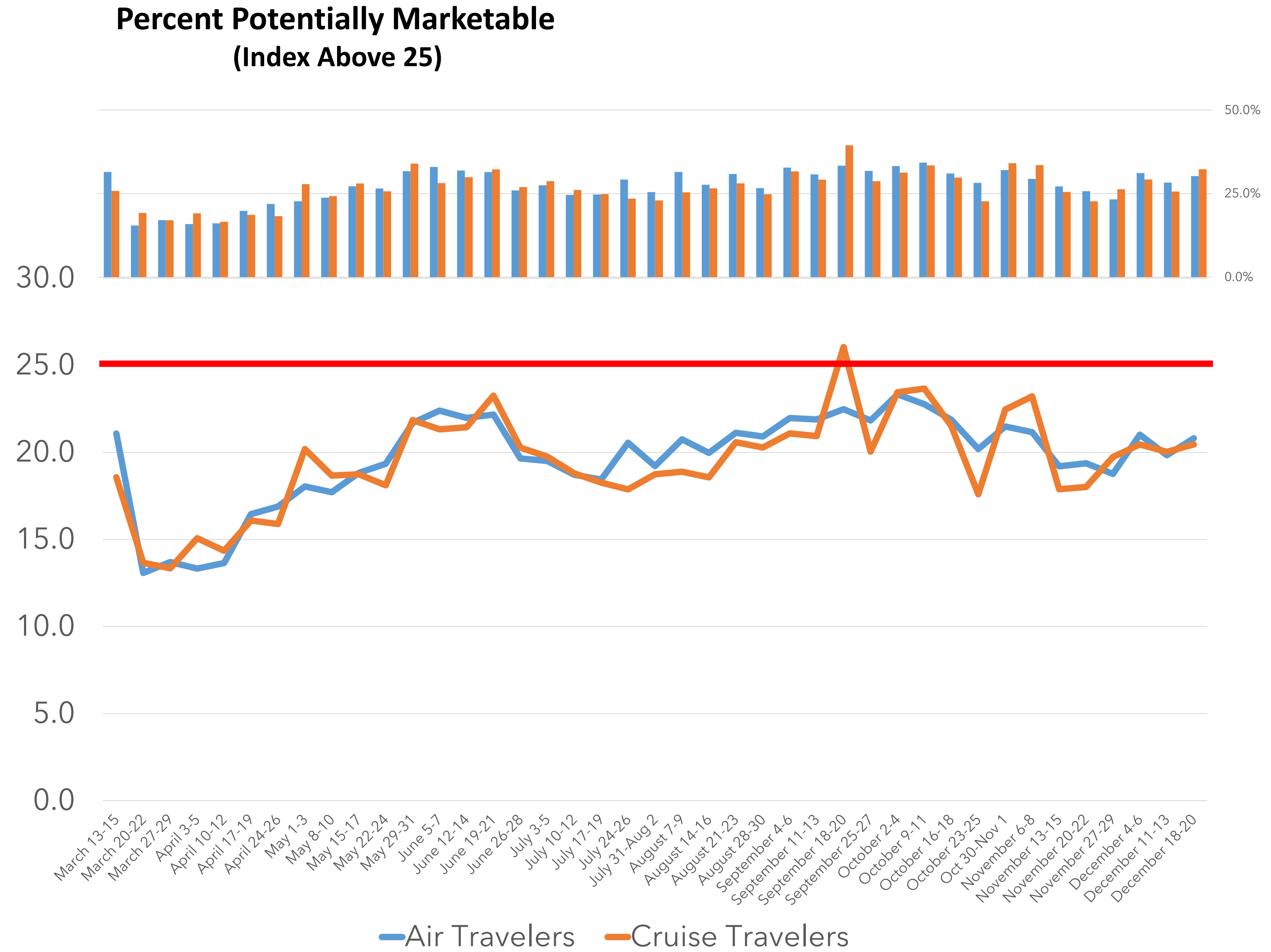
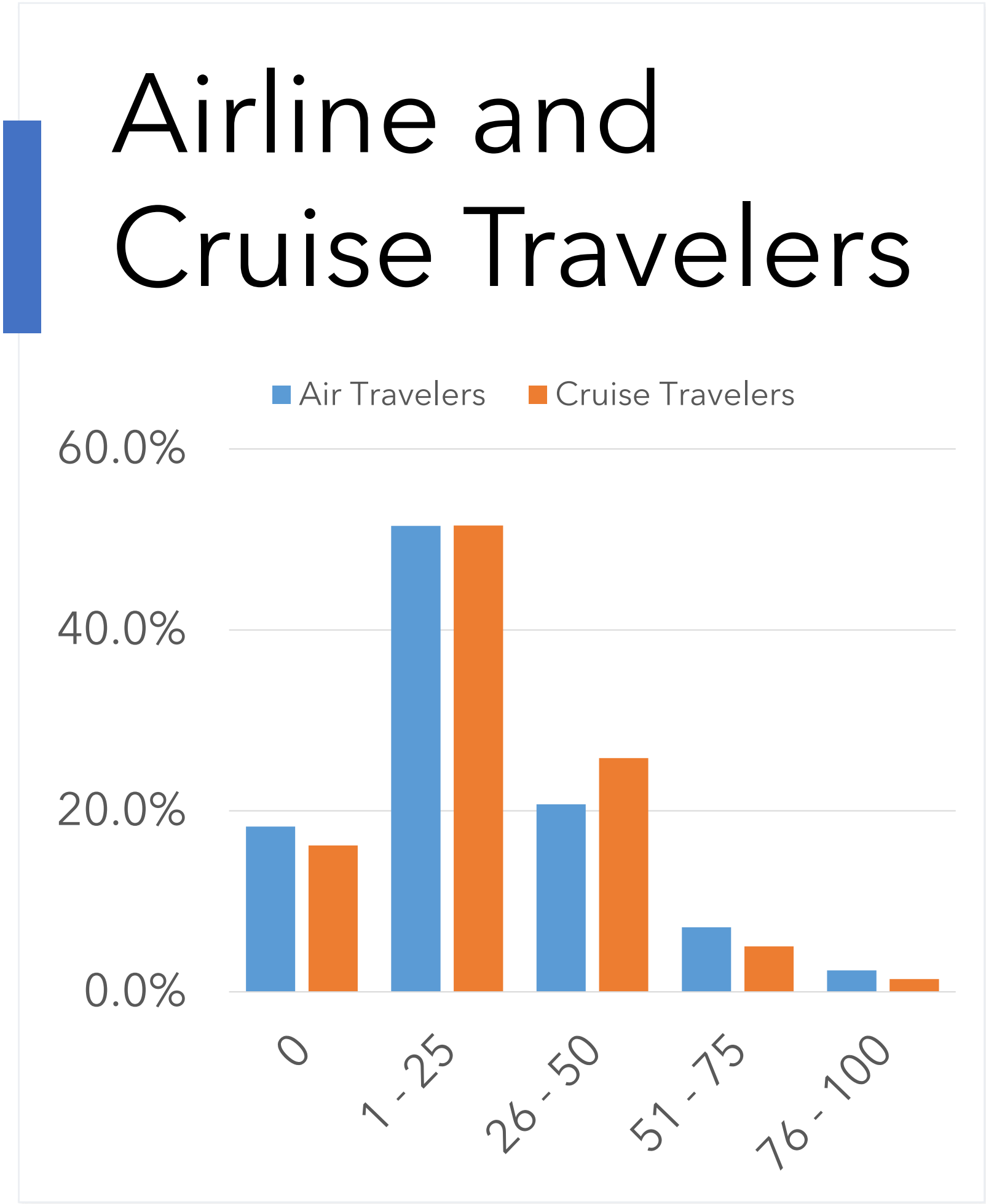


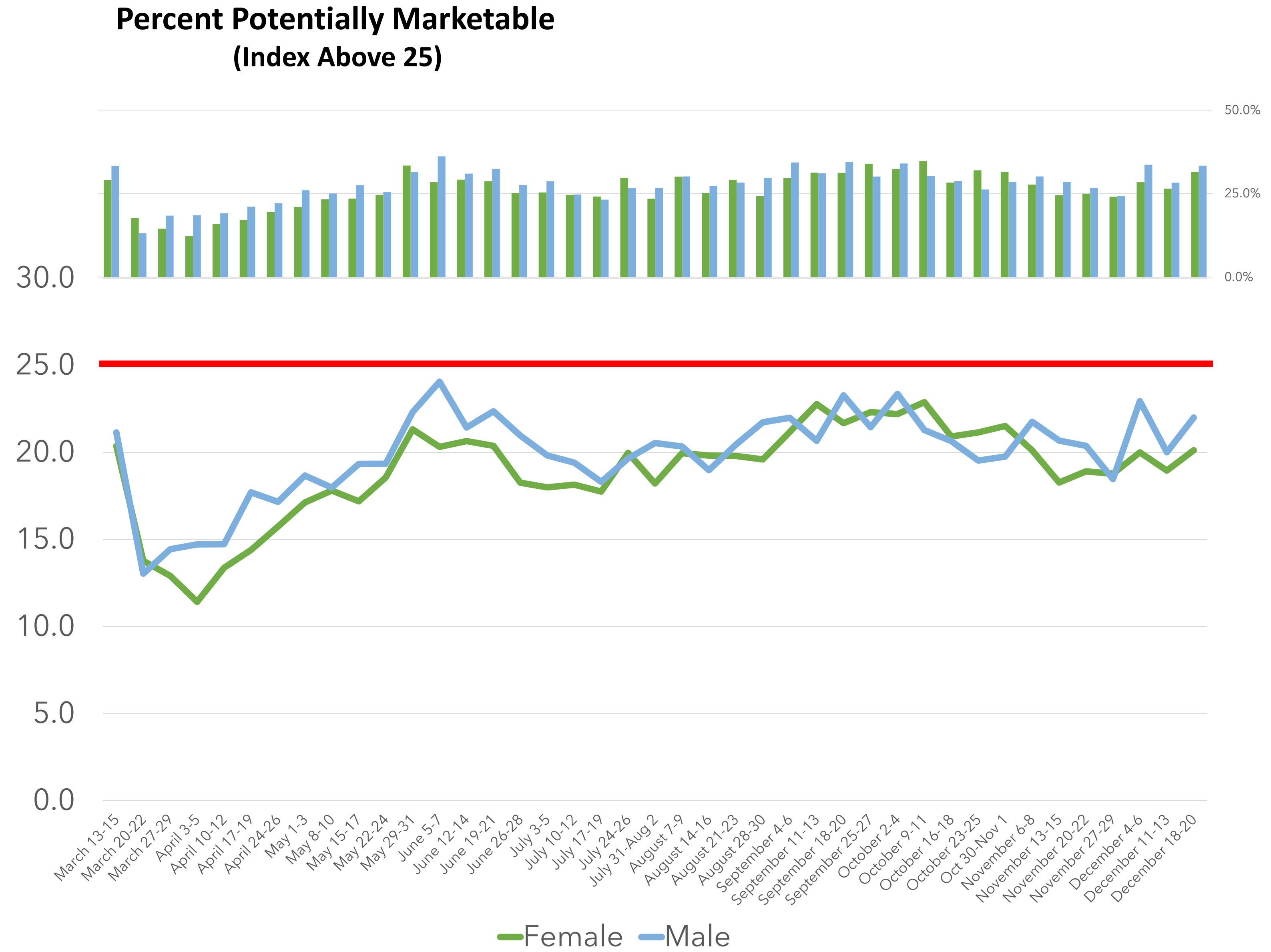
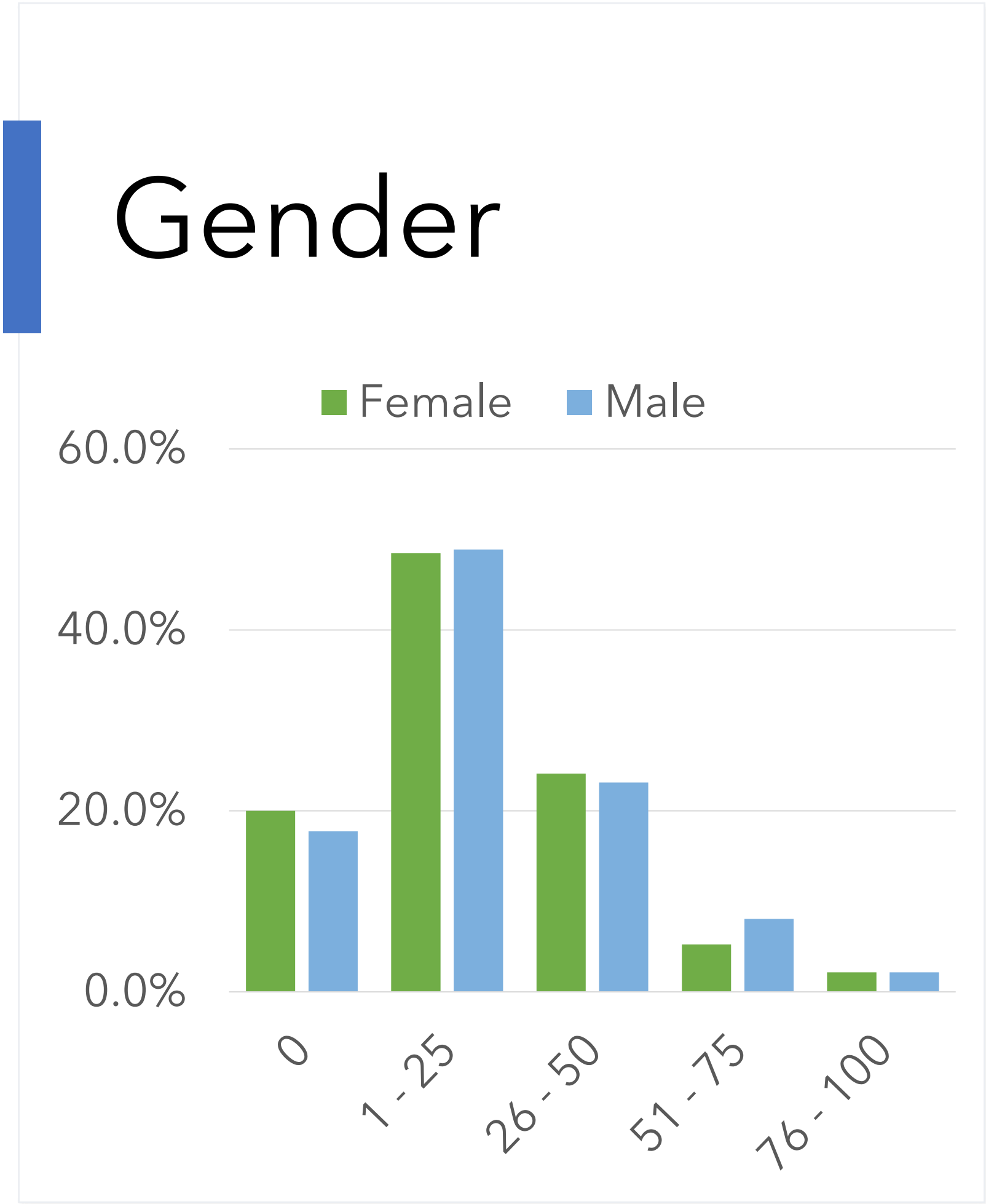
Travel Outlook

Neutral



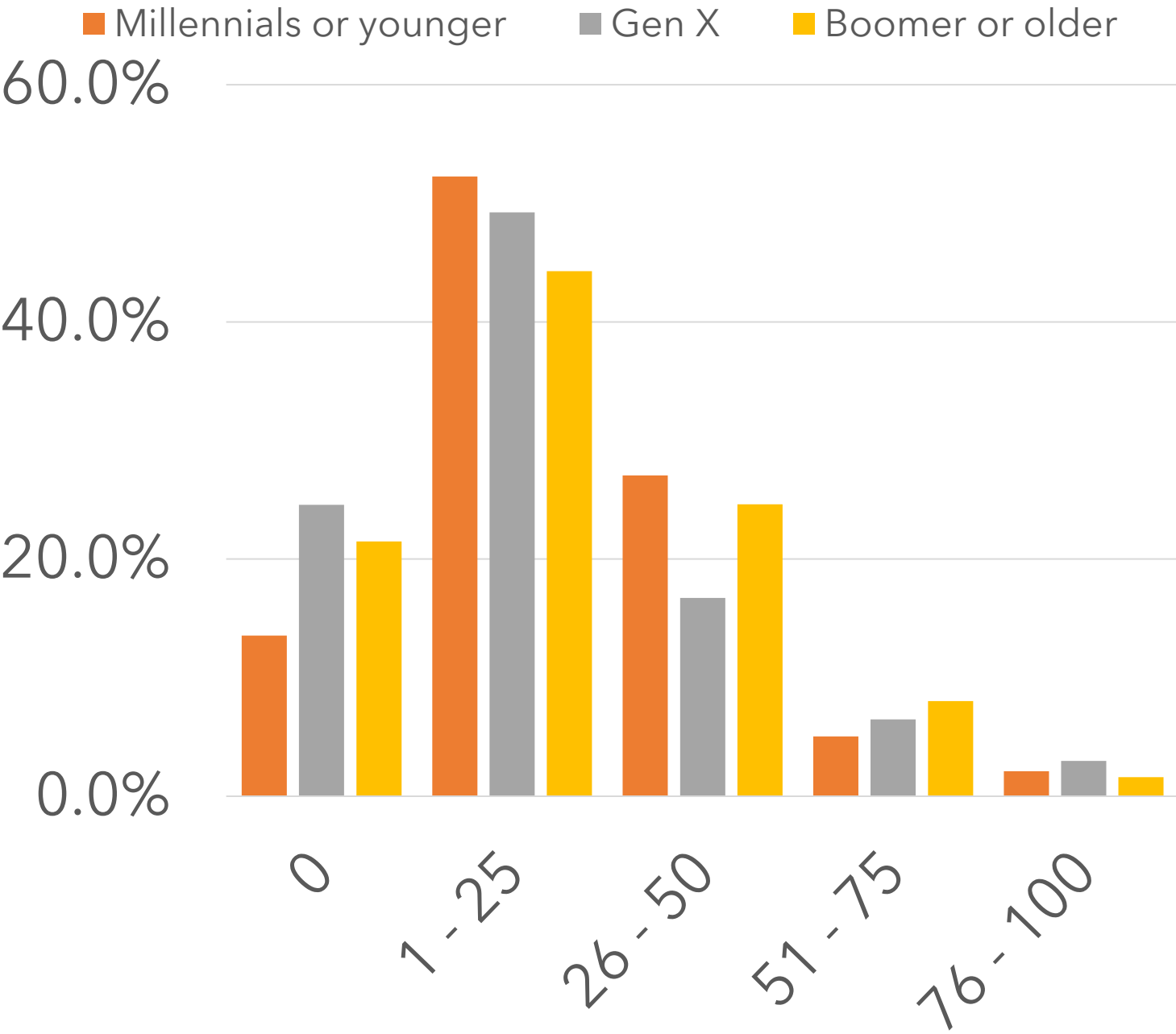




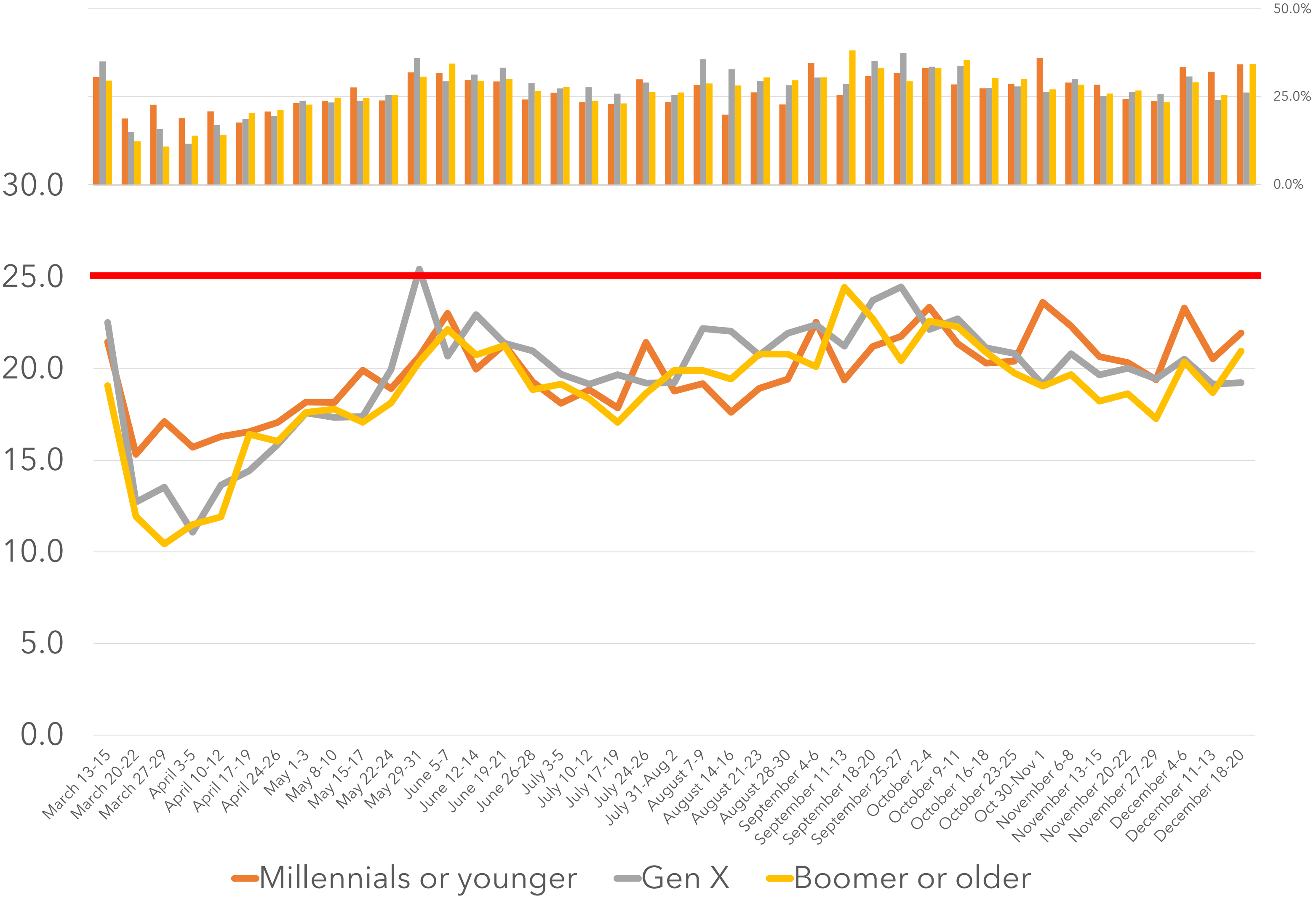


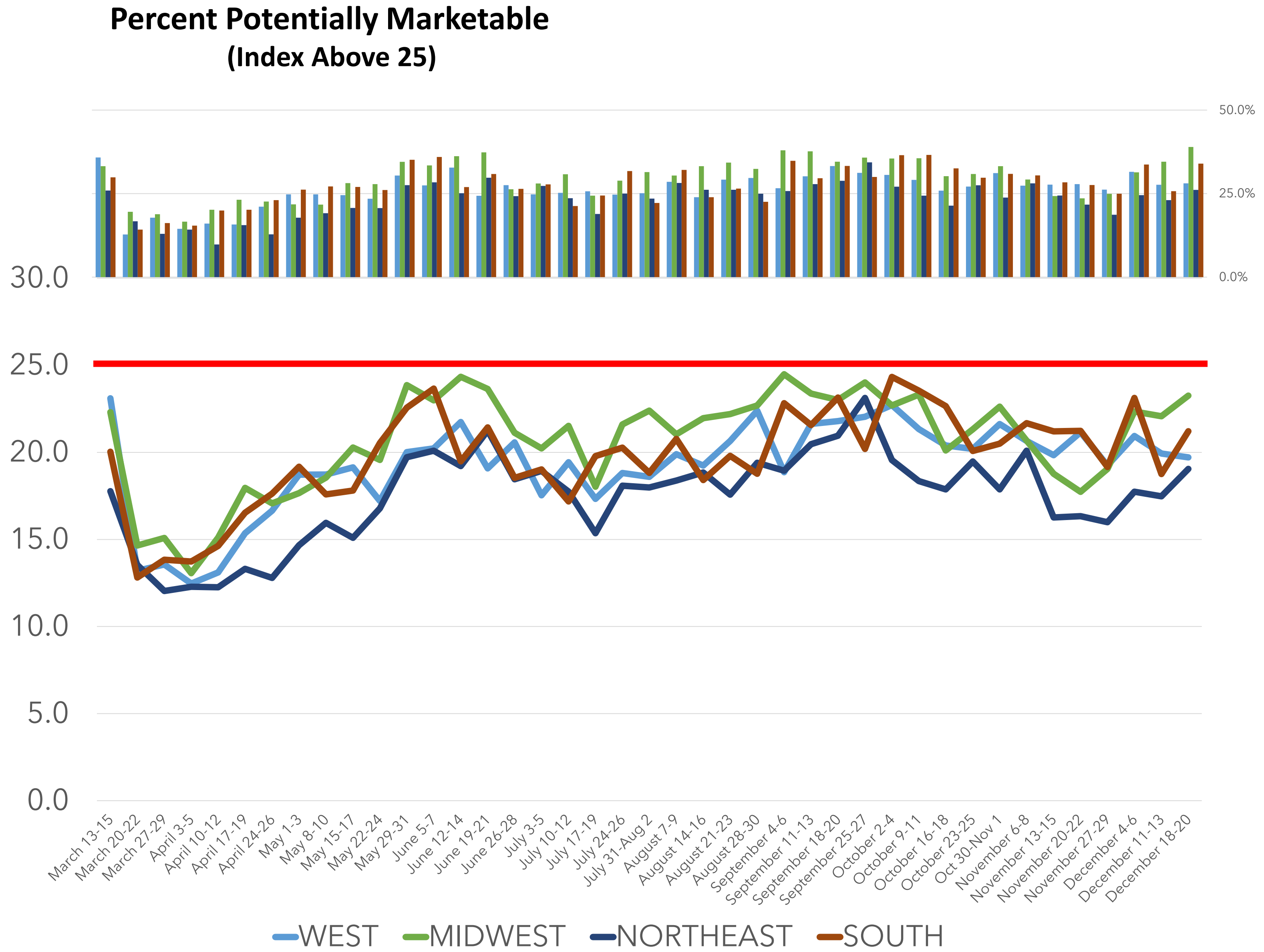
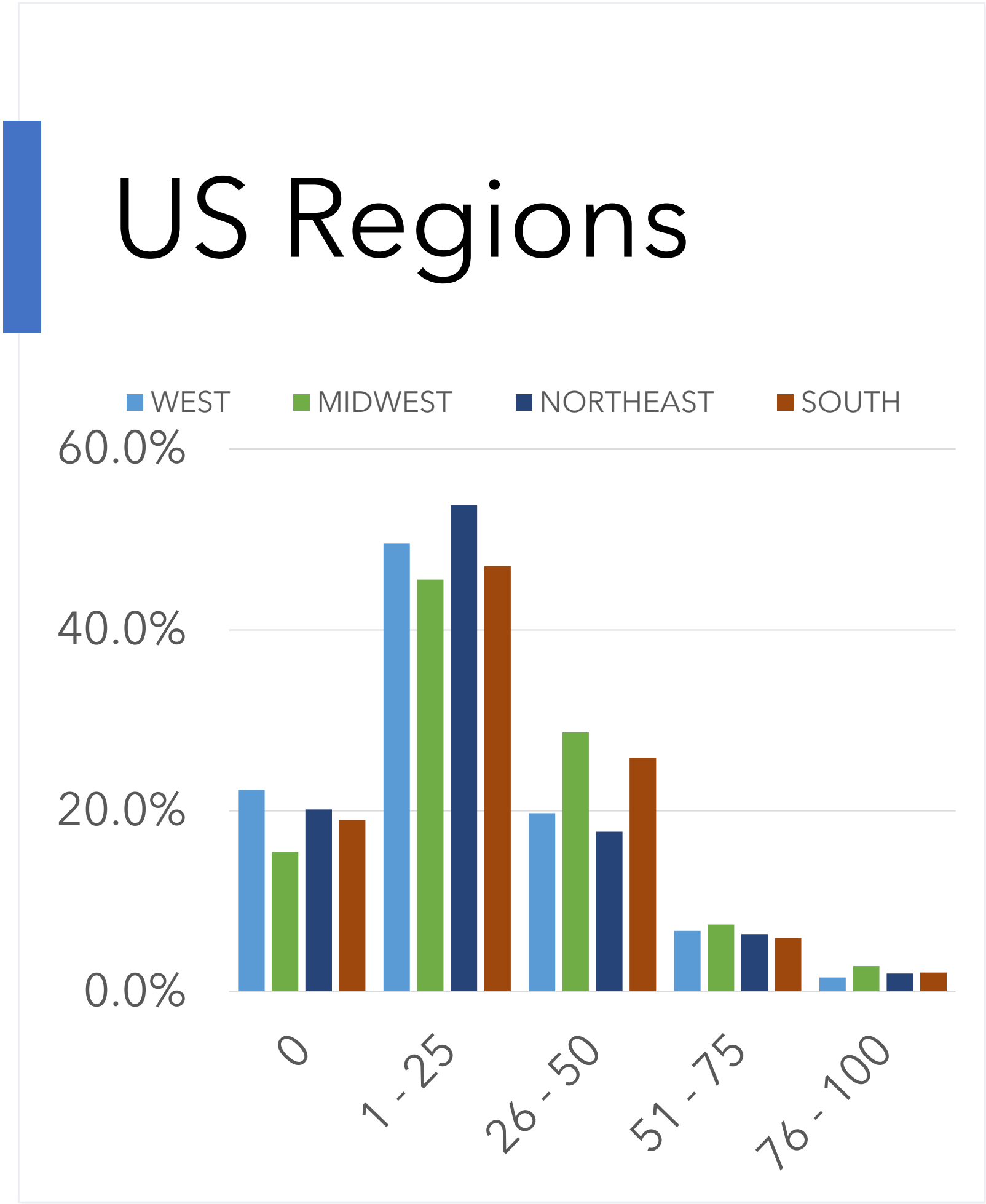


Generation



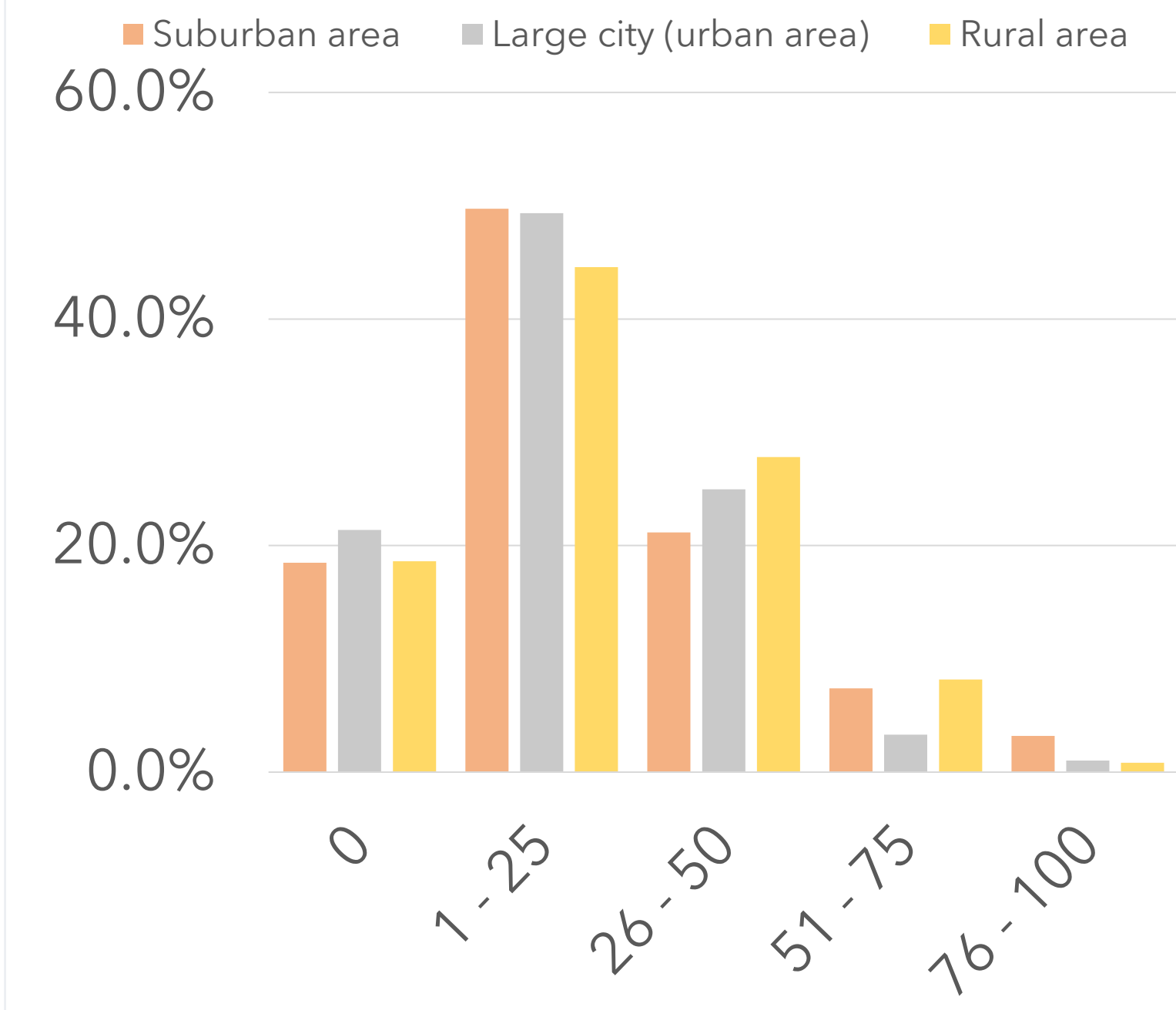
Percent Potentially Marketable (Index Above 25)



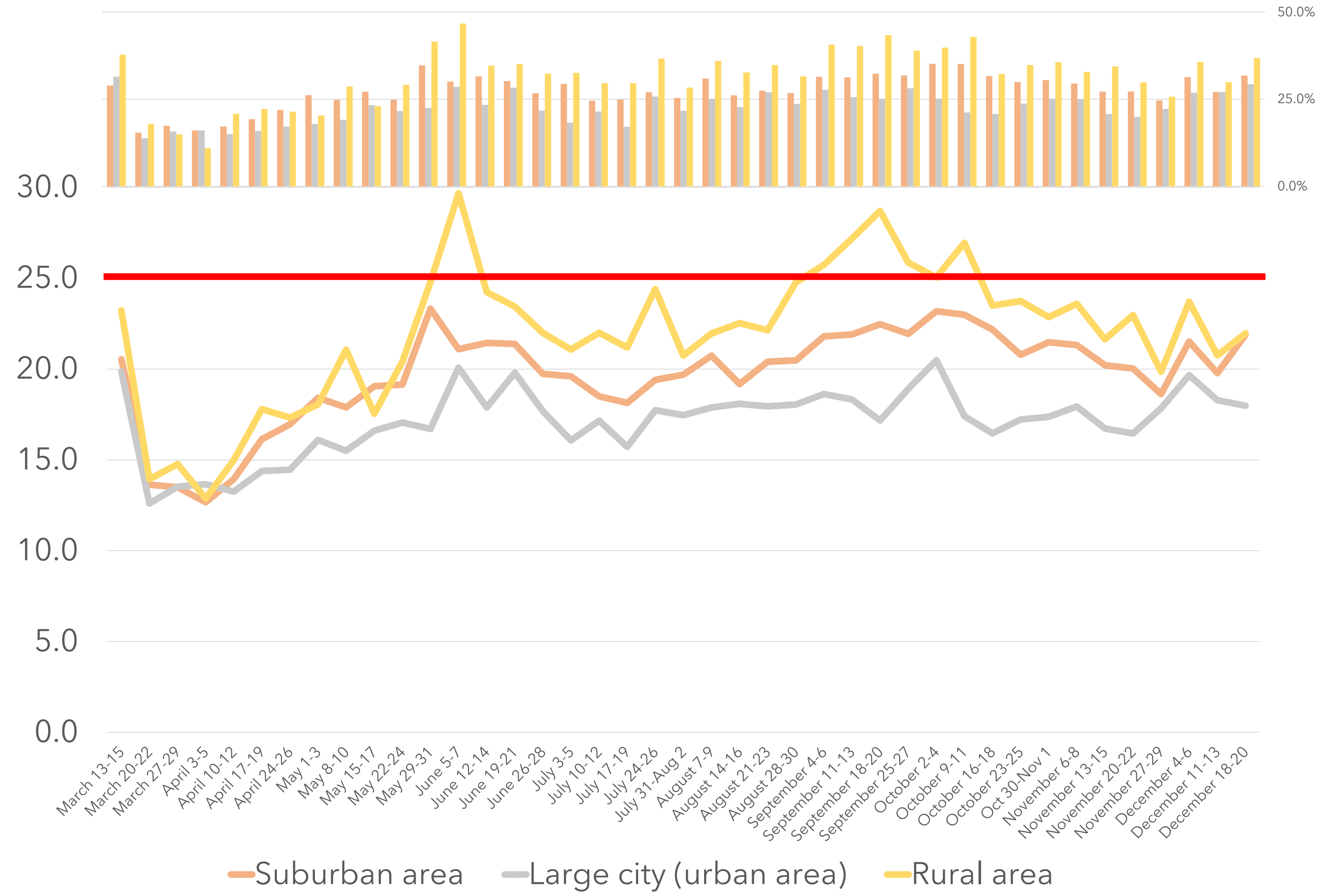


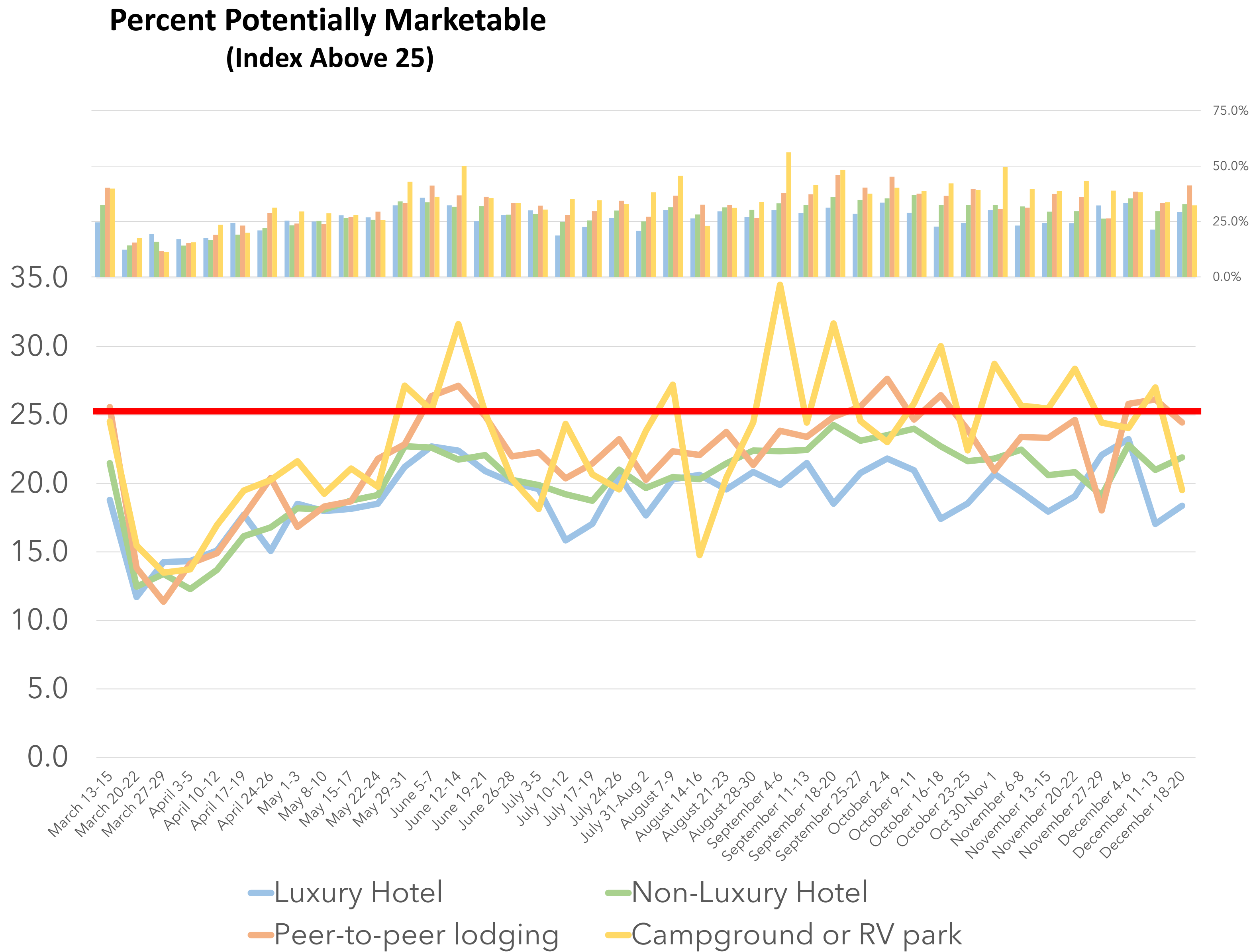
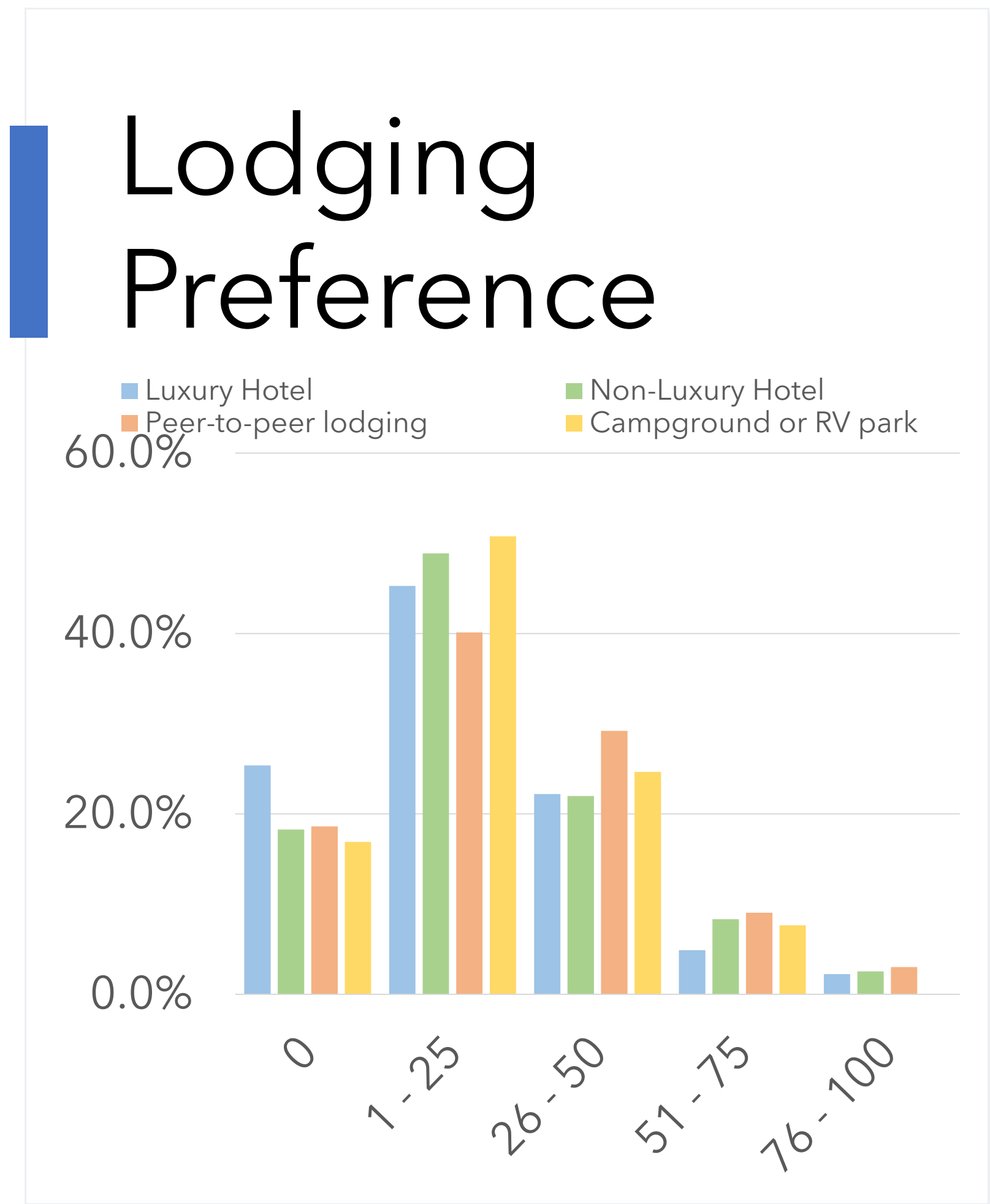


Residence Type



Percent Potentially Marketable (Index Above 25)







Questions?
Need More
Information?

- We're here for you. Please email us at info@destinationanalysts.com.
- Our full hub of insights is available at <https://www.destinationanalysts.com/covid-19-insights/>

15-minute presentations for your board and stakeholders

info@destinationanalysts.com



We Can Help You

Visitor & Target Audience Profiles

Brand Performance

Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

Custom Insights

info@destinationanalysts.com



CORONAVIRUS TRAVEL SENTIMENT INDEX:

WHAT TO EXPECT FOR THE REMAINDER OF 2020 & BEYOND

**We will continue this weekly survey of
1,200 American travelers into 2021 indefinitely.**

**The study will be conducted the weeks of Christmas & New Years
holidays, and findings will be released via email and blog.**

**We WILL have our regular industry webinar Christmas week:
Tuesday, December 22nd at 11AM ET.**

**A presentation of findings will be made on
Tuesday, December 28th at 11AM ET to our research subscribers only.**

**Industry webinars will resume again weekly on
Tuesdays at 11 AM ET starting January 5th.**



Wishing You a Joyous Christmas Holiday!

The Destination Analysts team hopes you enjoy a restful, peaceful and relaxing Christmas holiday and sends you happy wishes for the year ahead.

Destination  Analysts