

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF DECEMBER 7th, 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 will feature a panel of traveling consumers who will share their expectations for 2021, the types of destinations they're most interested in visiting in the upcoming year and the factors that will be influential in getting them out traveling.

Sign up to attend the webinar on Tuesday, December 8th at 11:00am ET [here](#).

Key Findings for the Week of December 7th

Please cite Destination Analysts when using or distributing this data

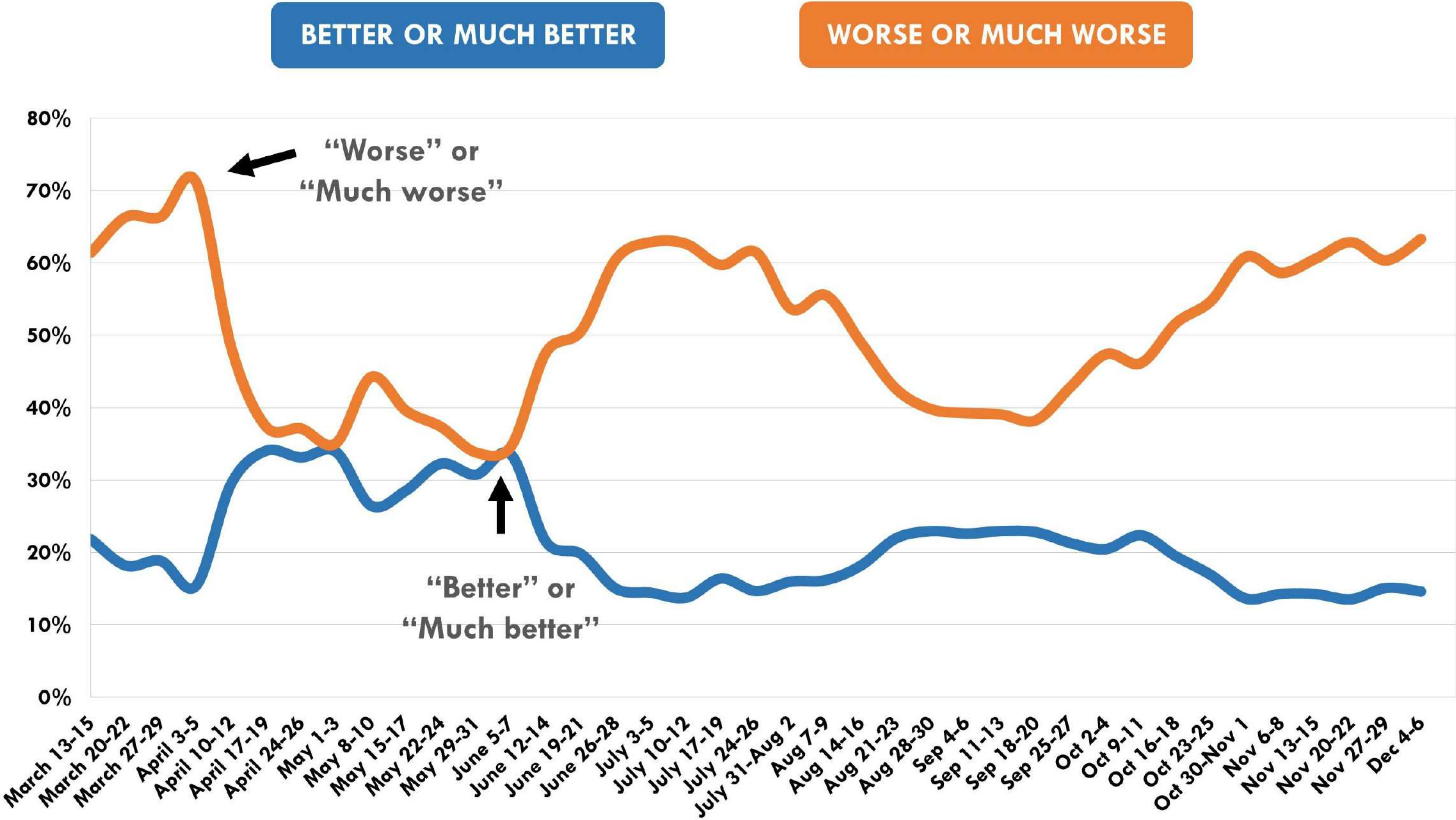
Expectations for the Coronavirus Outbreak

Over the weekend, COVID-19 surpassed heart disease as the top killer in the U.S. and 1 million more cases were recorded in just 5 days.

Yet while 73.4% of Americans continue to have a high degree of concern about their friends or family contracting the virus, those with similar concerns about personally contracting the virus declined to 66.7%.

Nevertheless, Americans largely see the last month of 2020 as one in which the pandemic situation is going to worsen. In fact, Americans' comfort going out for leisure activities even within their own community has declined for the last 3 weeks.

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK MARCH 15 – DECEMBER 6



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 1-39. 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 and 1,204 completed surveys.)

Confidence in Traveling Safely

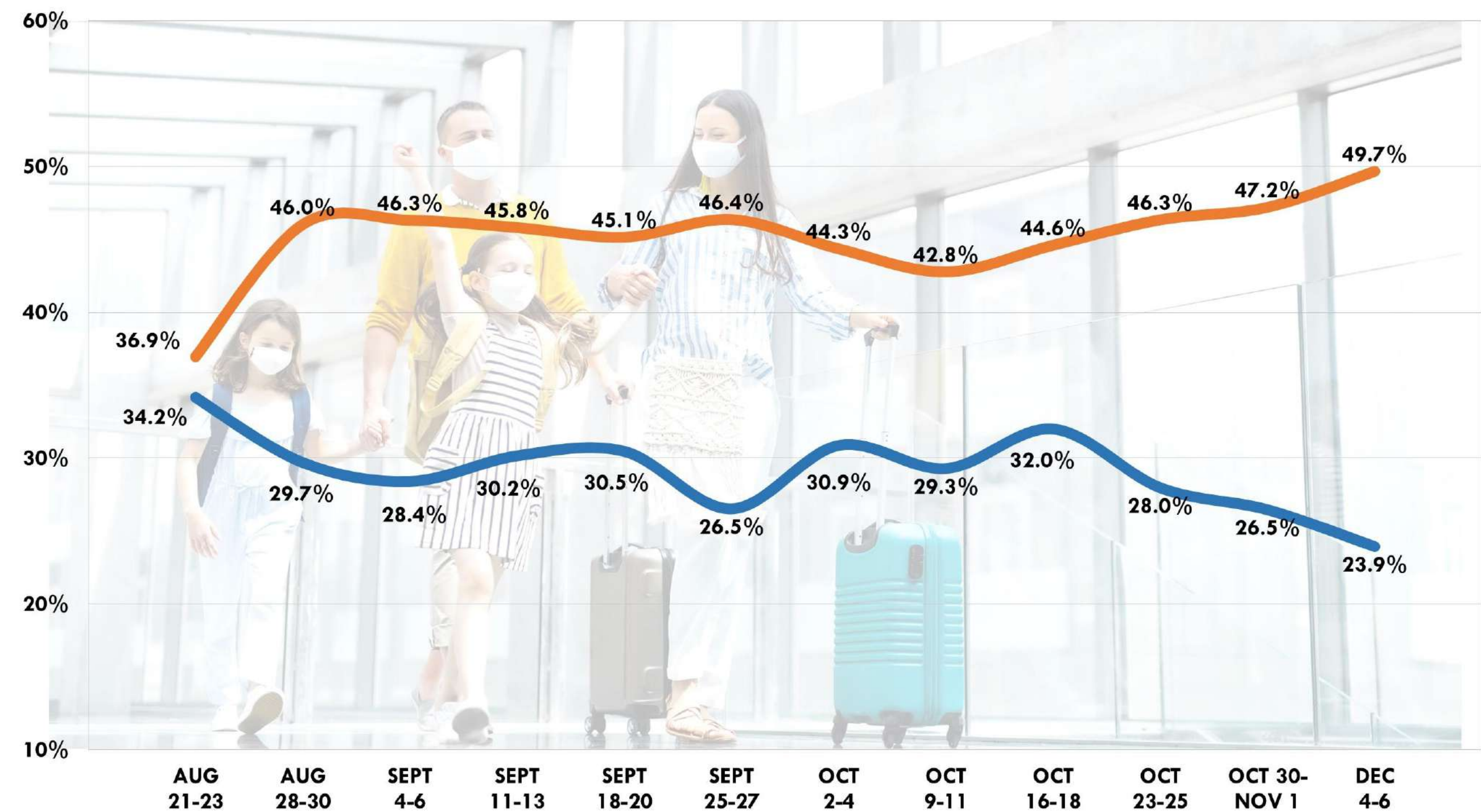
Although there has not been a return to strong feelings that travel activities are generally unsafe, the current state of the pandemic has eroded Americans' confidence that travel can be done safely.

Half feel not very or not at all confident that they can travel safely in the current environment, while just 23.9% are confident or very confident—down from nearly one third six weeks ago.

CONFIDENCE IN TRAVELING SAFELY
AS OF DECEMBER 6TH

CONFIDENT OR VERY CONFIDENT

NOT VERY CONFIDENT OR NOT CONFIDENT AT ALL



Question: How confident are you that you can travel safely in the current environment?

(Base: Waves 24-34 and 39 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, and 1,204 completed surveys.)

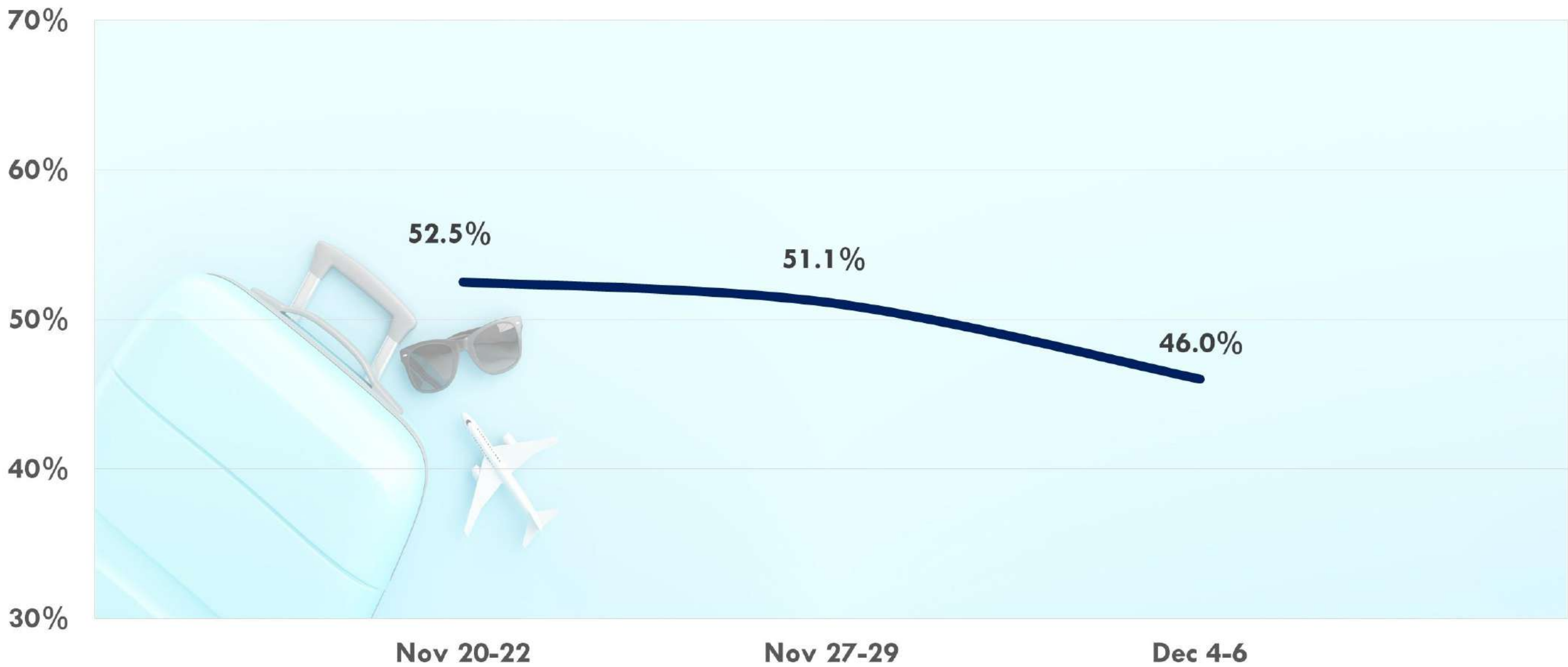
Vaccine Developments Impact on Optimism for Safe Travel

The gloominess combined with more clarity on timelines for production and distribution appear to have muted some of the strong hope initially felt about a COVID vaccine.

After Pfizer’s announcement ahead of the week of November 23rd, 58.1% said vaccine developments made them more optimistic about life returning to normal (or near normal) in the next six months. This week the percent that still feels this way dropped to 49.1%. **Similarly, the percent who say the recent vaccine developments have made them more optimistic that they can travel safely in the next six months has declined to 46.0% from 52.5% three weeks ago.**

VACCINE DEVELOPMENTS IMPACT ON OPTIMISM FOR SAFE TRAVEL (IN NEXT 6 MONTHS) NOVEMBER 20 – DECEMBER 6

% OF AMERICANS WHO ARE MORE OR MUCH MORE OPTIMISTIC



Question: Does recent news about vaccine developments affect your optimism about being able to travel safely in the next six (6) months? (select one to fill in the blank).

The vaccine news has made me _____ about being able to travel safely in the next six months.

(Base: Waves 37-39 data. All respondents, 1,205, 1,205 and 1,204 completed surveys.)

Openness to Travel Inspiration

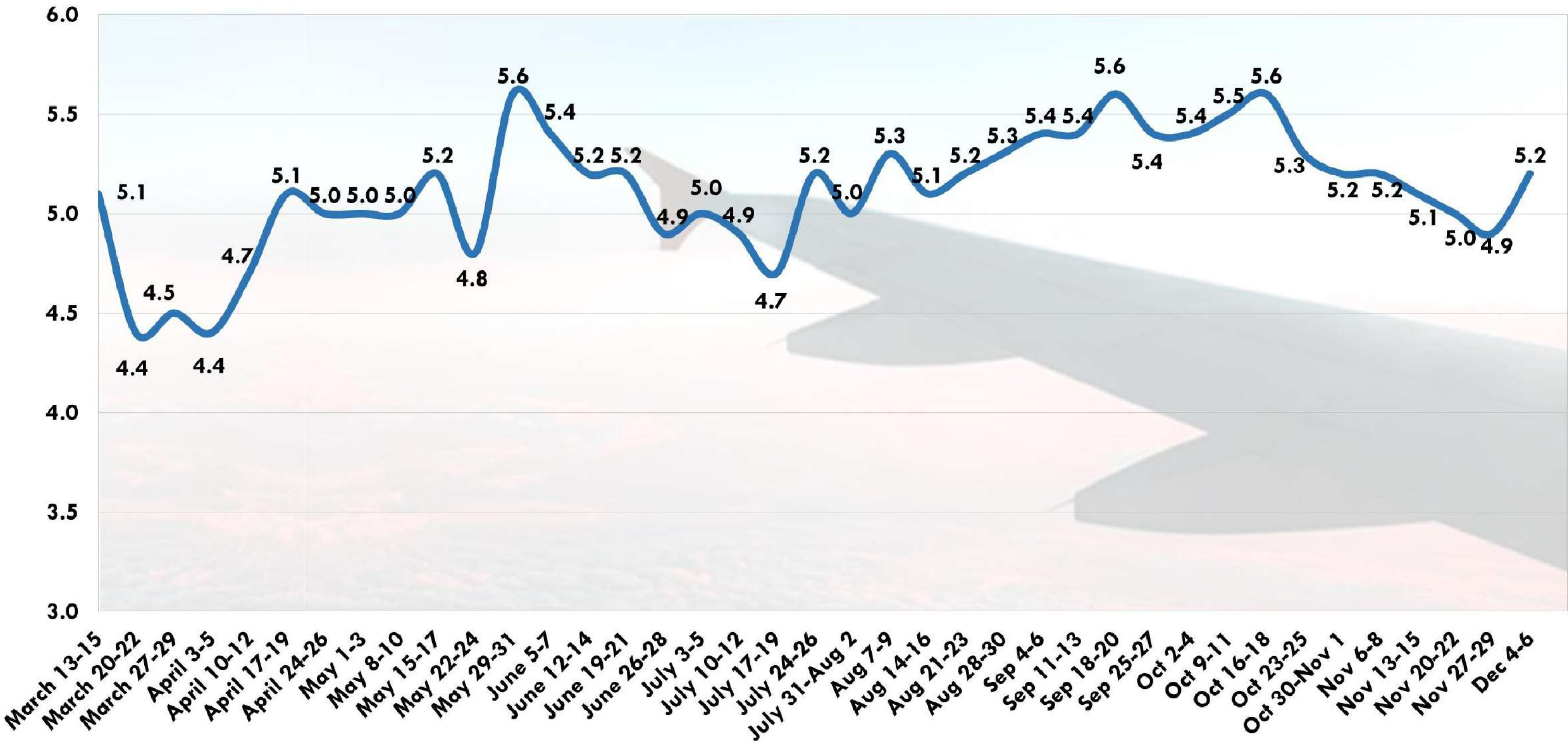
Americans' current sentiment has some impact on marketability for travel.

Those in a travel readiness state of mind dropped to 52.5% from 55.5% in the last week, and those that can be motivated by discounts and price cuts to travel in the near-term dropped to 36.0% after hitting 40.3% two weeks ago. However, Americans also still demonstrate openness to travel messaging. Those that agree that they have lost their interest in travel for the time being dropped to 43.1% from a high of 50.0% last week. **And after consistently declining for a month, the proportion excited to learn about new, exciting travel experiences or destinations to visit improved to 44.2%.**

OPENNESS TO TRAVEL INSPIRATION MARCH 13 – DECEMBER 6



OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE)



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

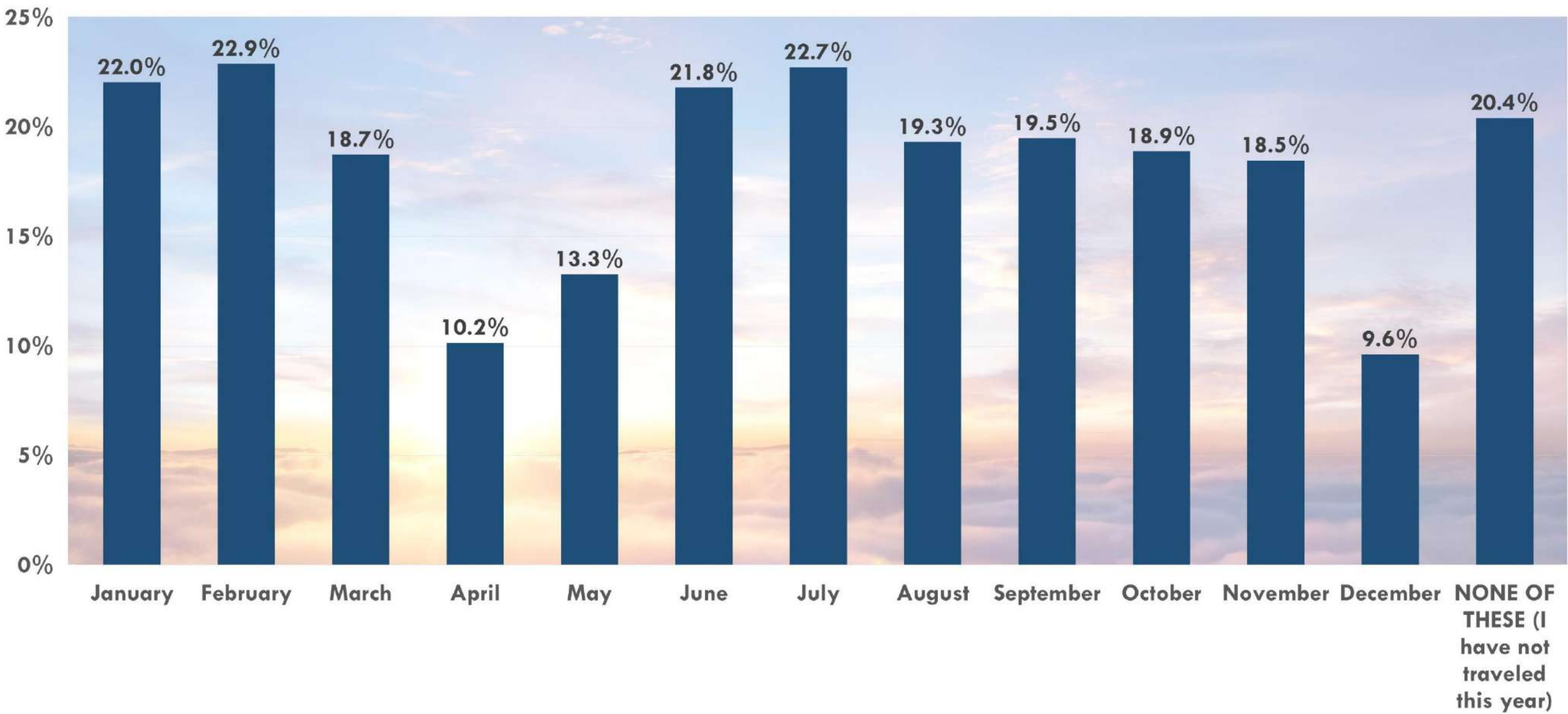
(Base: Waves 1-39 All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205 and 1,204 completed surveys.)

When Americans Traveled in 2020

As we look to the quickly approaching new year and what travel may look like, it's helpful to start with a look back on the travel that occurred throughout 2020, when less was known about, and when Americans were less experienced with, the virus. **About 80% of American travelers took at least one trip in 2020, with an average of 2.9 leisure trips reported.**

Looking at the months Americans report taking trips in, **the months with the highest rates of travel post onset of the coronavirus—and after the initial shutdowns-- were June and July.** Lesser but relatively consistent numbers of **Americans traveled in the Fall months.** Fully one in five American travelers 20.4% traveled by air since the pandemic began. But Americans response to surges in cases is a reminder about what the travel industry will contend with until a vaccine is widely available. Nearly 47% of American travelers said they cancelled an upcoming trip specifically because of this recent surge we are in.

WHEN AMERICANS TRAVELED IN 2020
AS OF DECEMBER 6TH



Question: In which month(s) of 2020 did you travel for any reason?

(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)

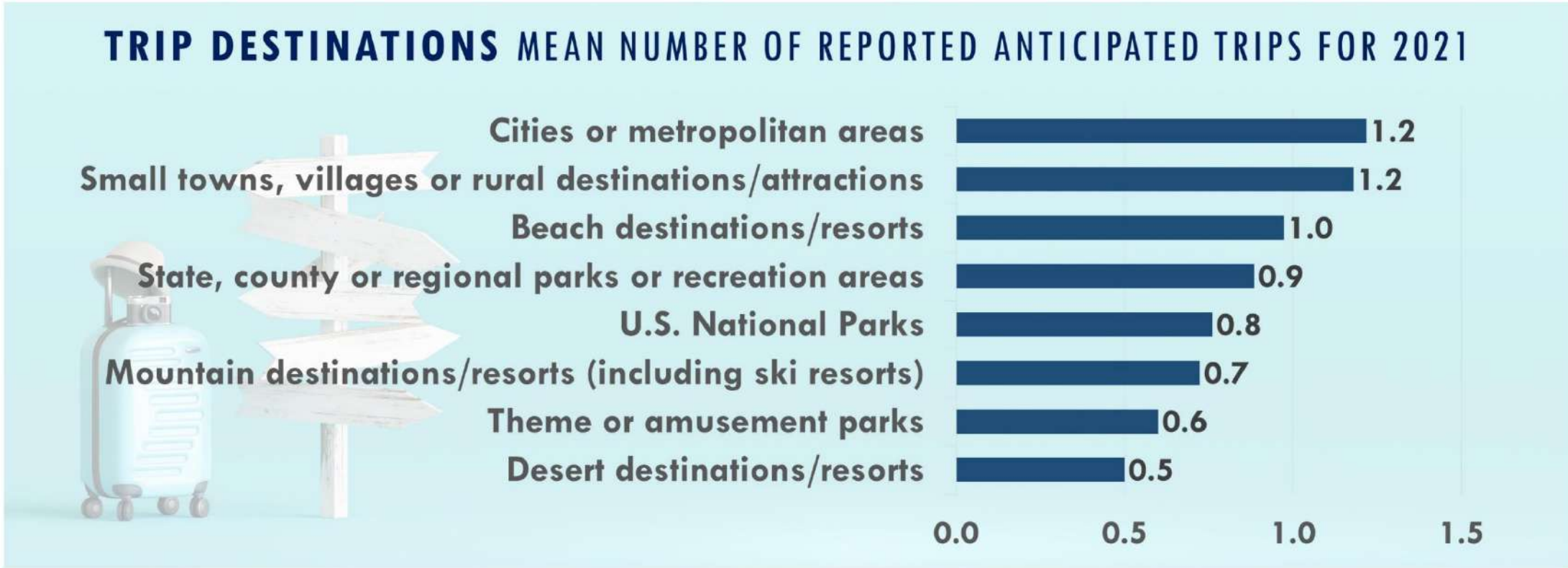
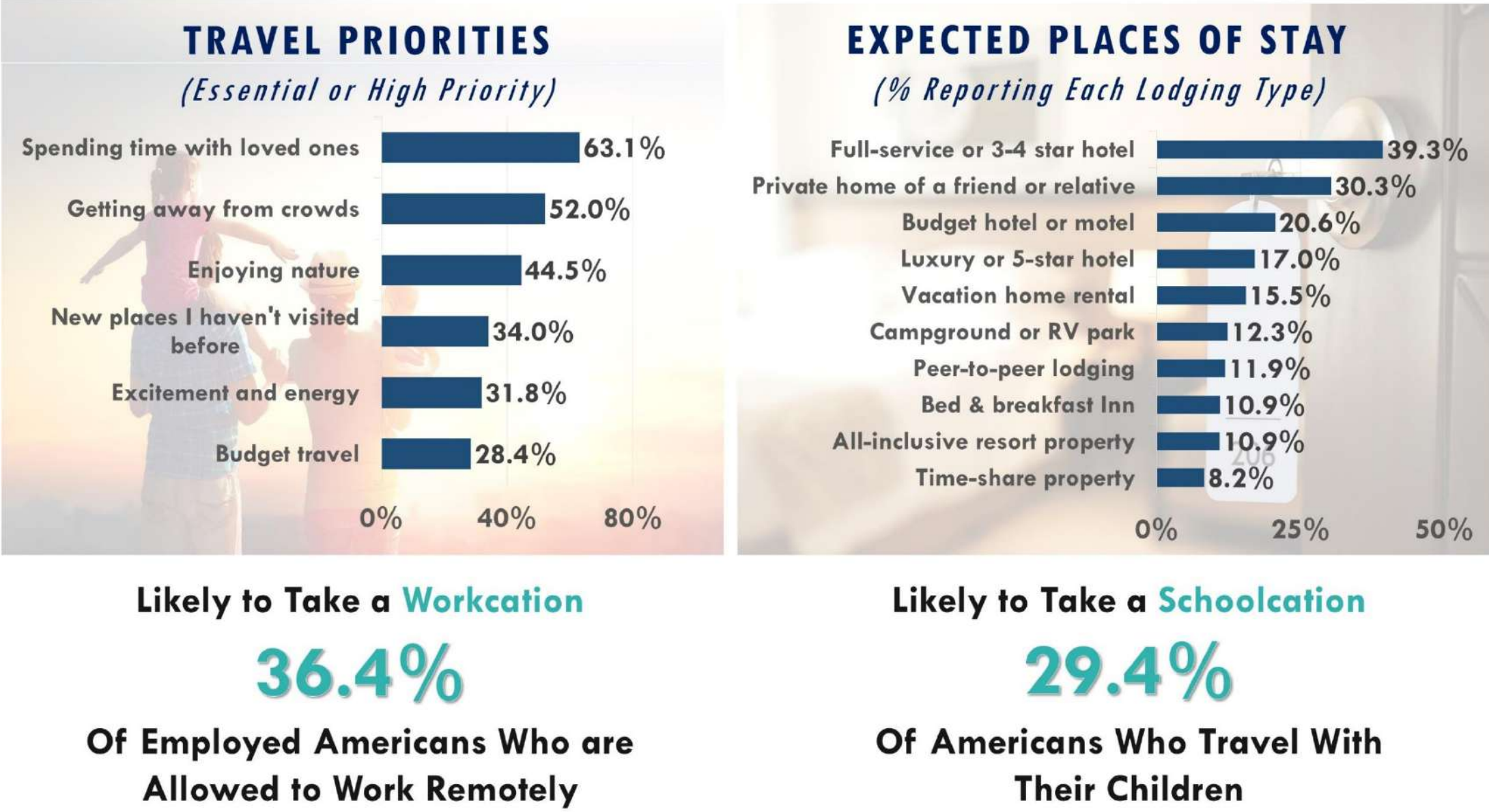
American Travel in 2021

As so many feel their 2021 will be an improvement over their 2020, this week we asked American travelers what they anticipate about their travel in the new year.

As detailed in the infographic to the right, **Americans plan on taking about 3 leisure trips on average (approximately 1 trip less than pre-pandemic)—primarily to cities, small towns and beaches. One in five of these travelers anticipate at least one of these trips will be international.** Well over a third of Americans whose job allows them to telecommute say they are likely to take a “workcation” in 2021. Meanwhile, 29.4% of Americans who travel with school-aged children say they are likely to take a “schoolcation.” Over 47% say they will prioritize leisure travel in their personal budget. In terms of the actual experiences they will prioritize, spending time with loved ones, getting away from crowds, enjoying nature, going to new places they haven’t been before, excitement and energy, as well as budget travel will be top. Hotels will still be the most common lodging type.

(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)

AMERICAN TRAVEL IN 2021

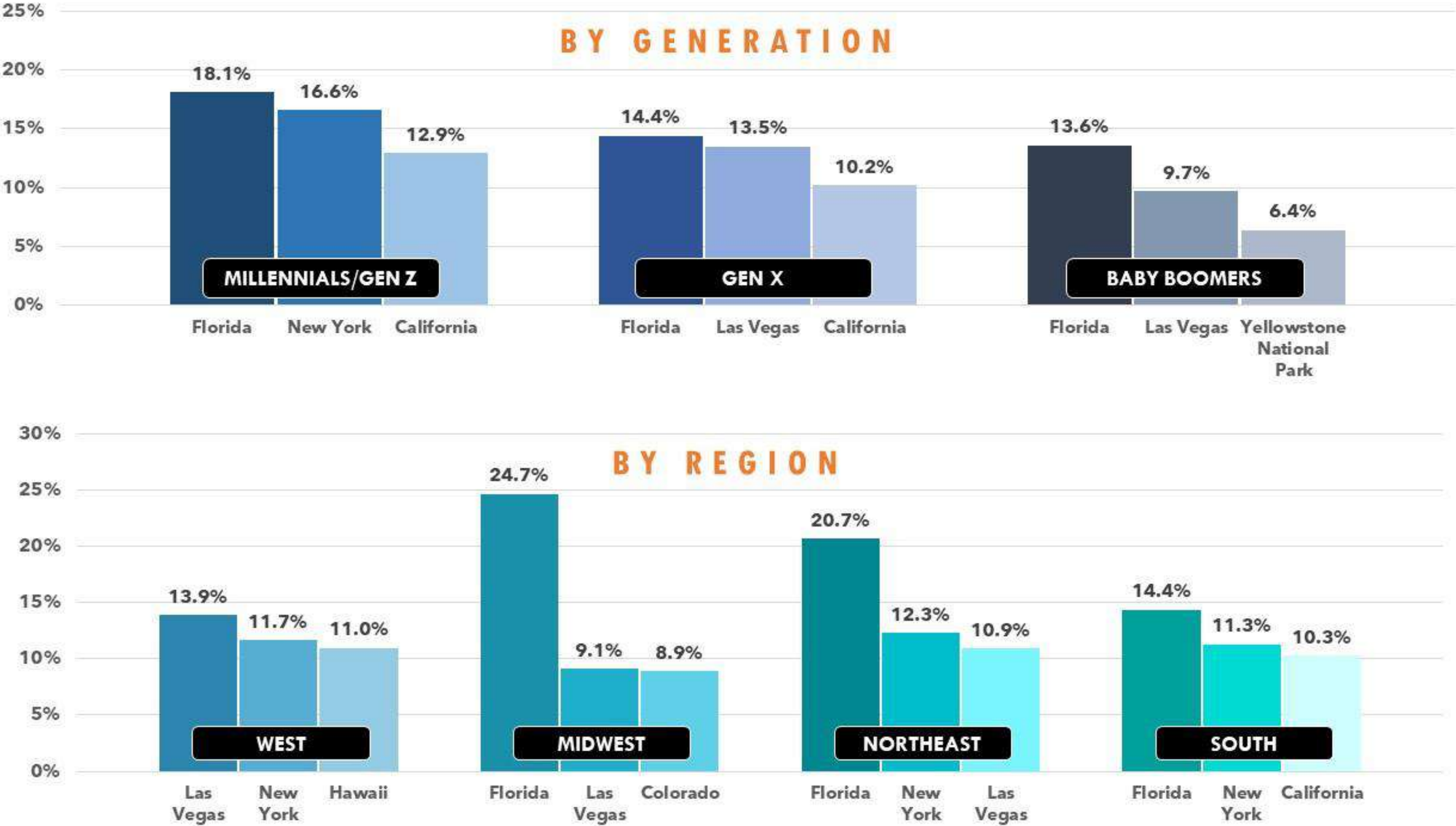


Americans' Top Destinations for 2021

As to the most popular destinations Americans plan to visit in 2021, Florida, New York, Las Vegas and California look to remain tourism powerhouses.

Of course, those in different generations and regions of the country have various travel tastes, with attraction to destinations like Hawaii, Colorado and Yellowstone National Park rising depending on age and residence.

AMERICANS' TOP DESTINATIONS FOR 2021 AS OF DECEMBER 6TH



Question: Which domestic destinations (if any) are you planning to visit or considering visiting next year (2021)? (Write in up to you top 3)

(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)



Coronavirus Travel Sentiment Index

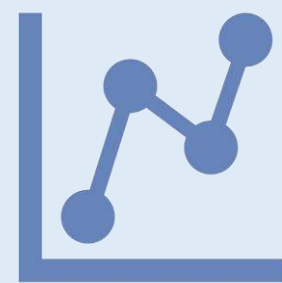
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of December 7th

What is a Predictive Index?



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



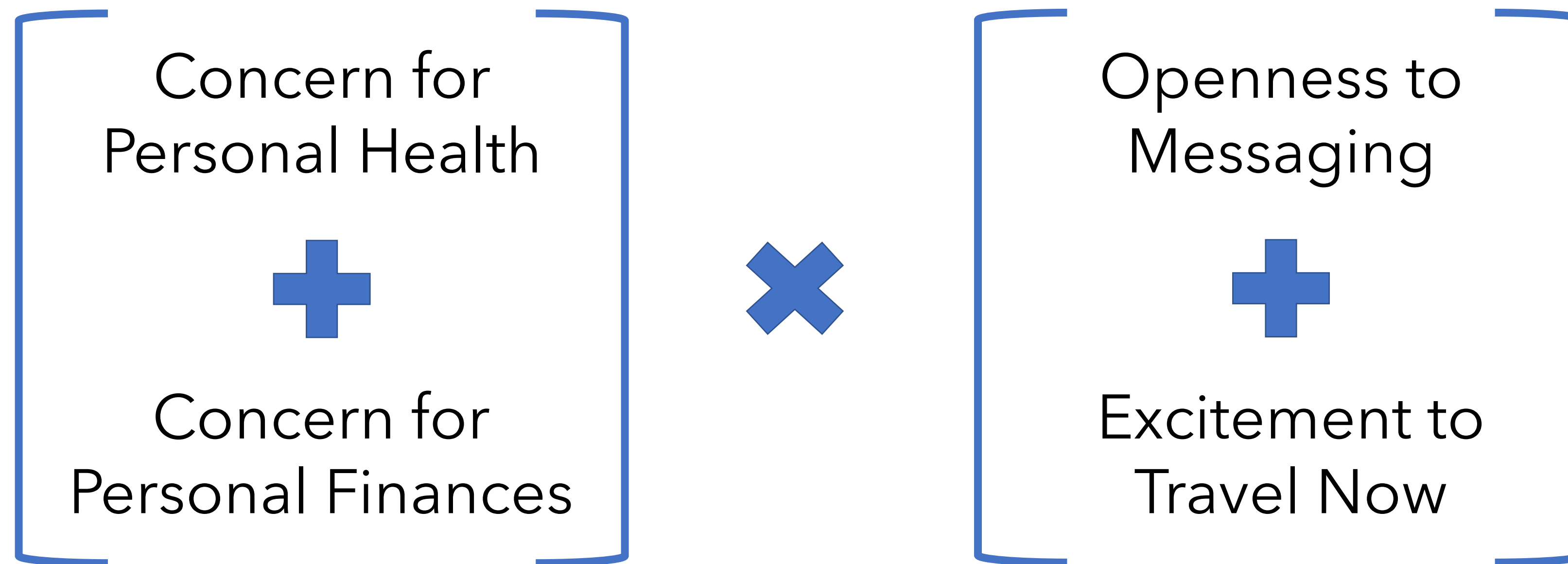
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

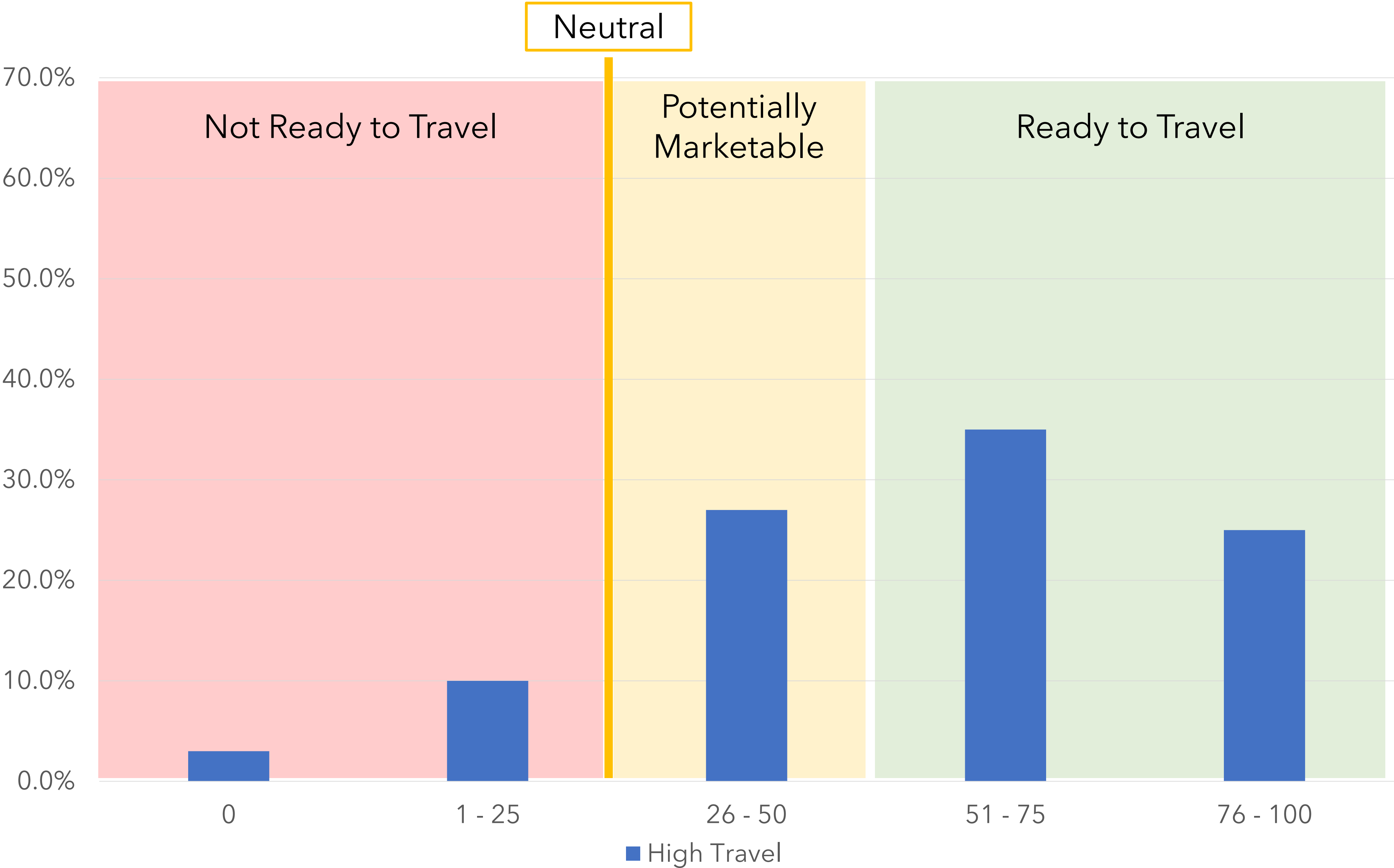
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

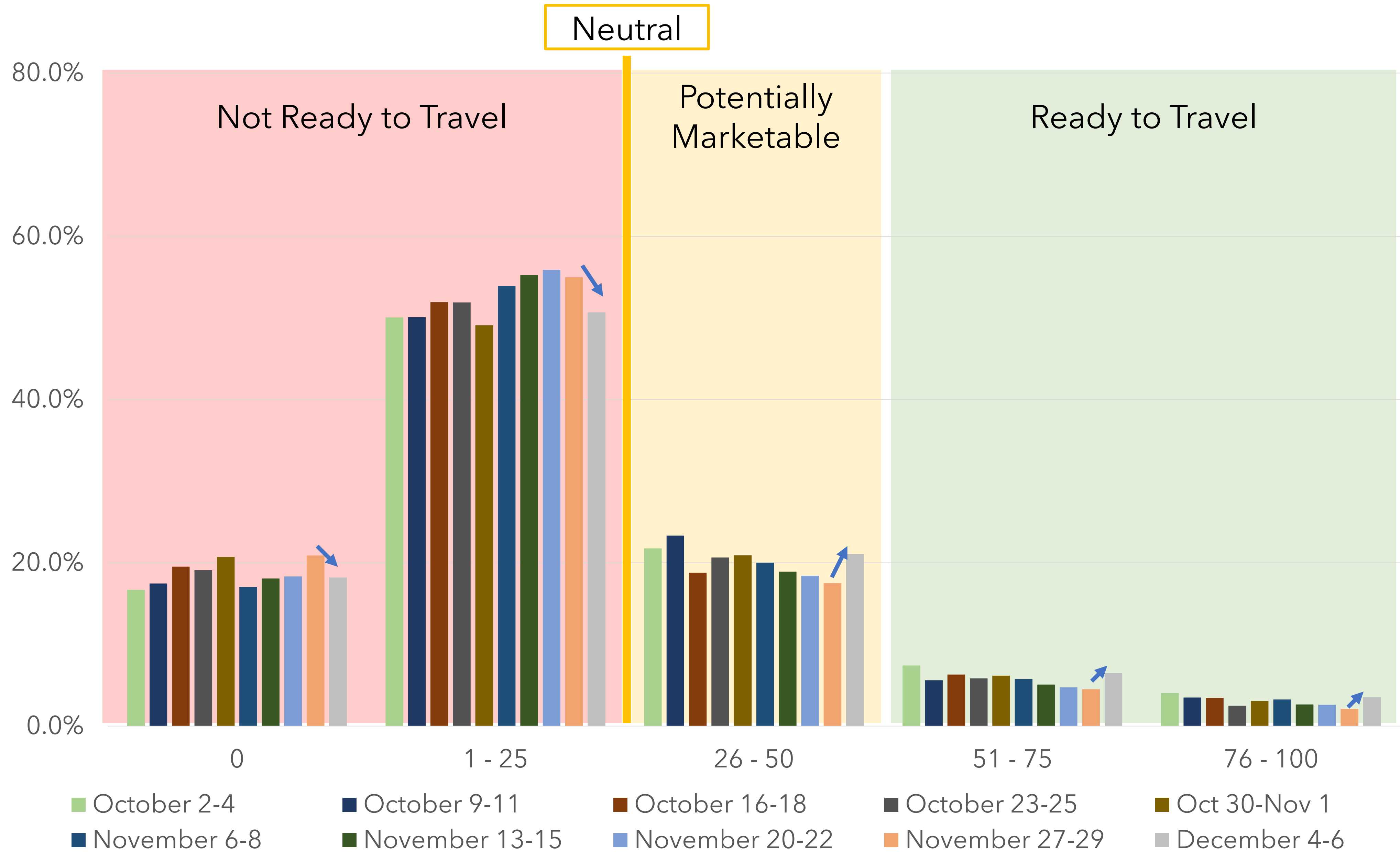


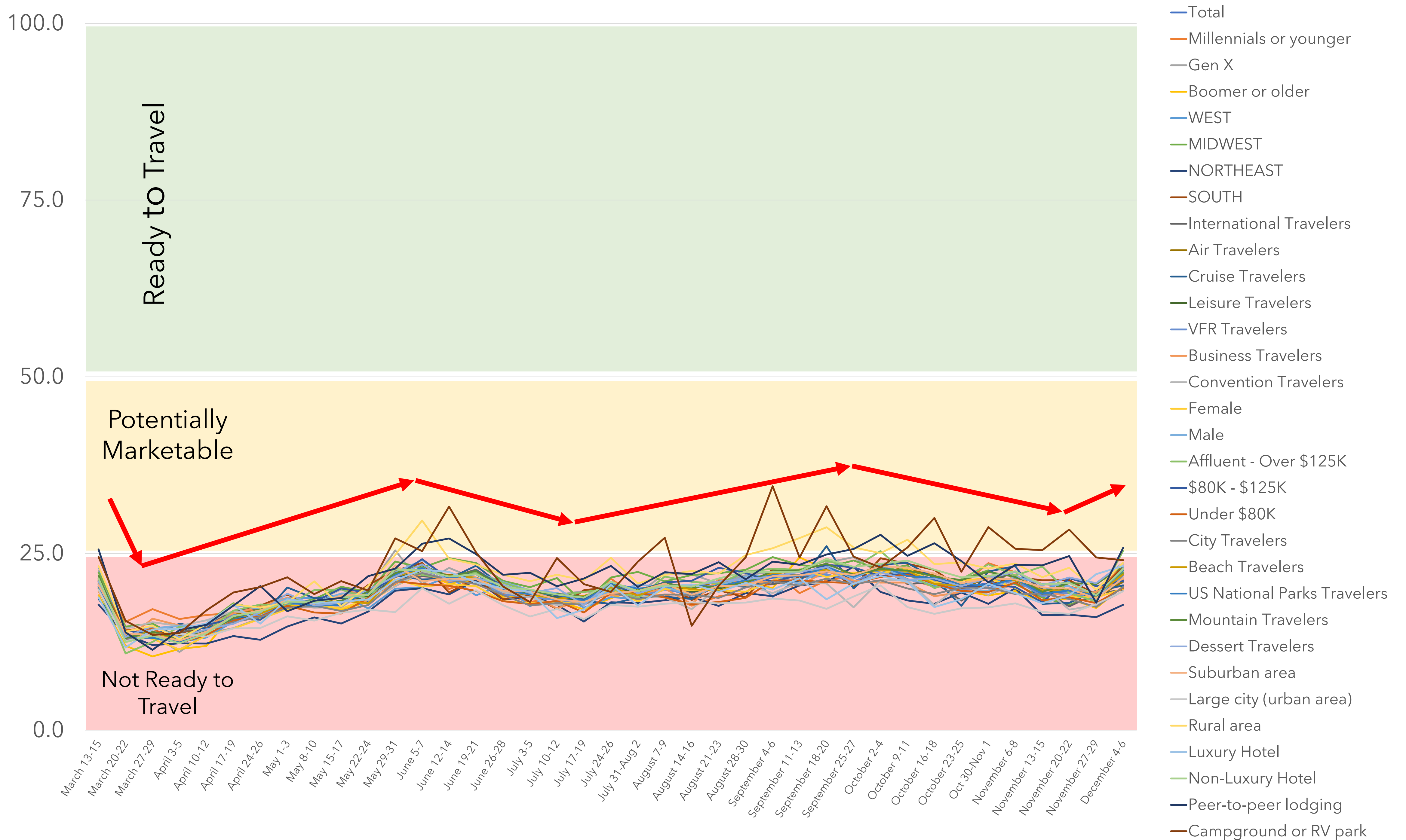
*Normalized to a 100pt scale

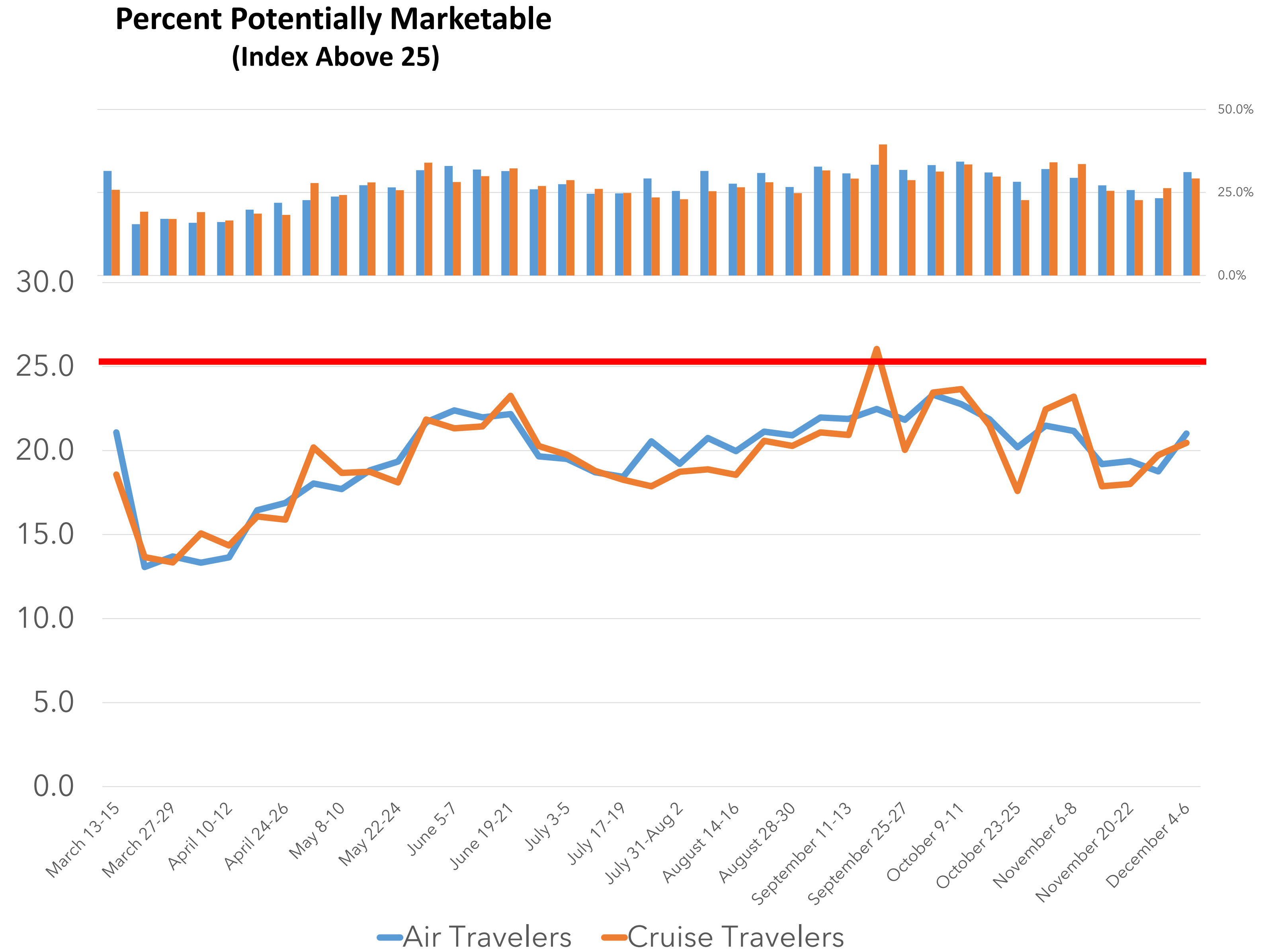
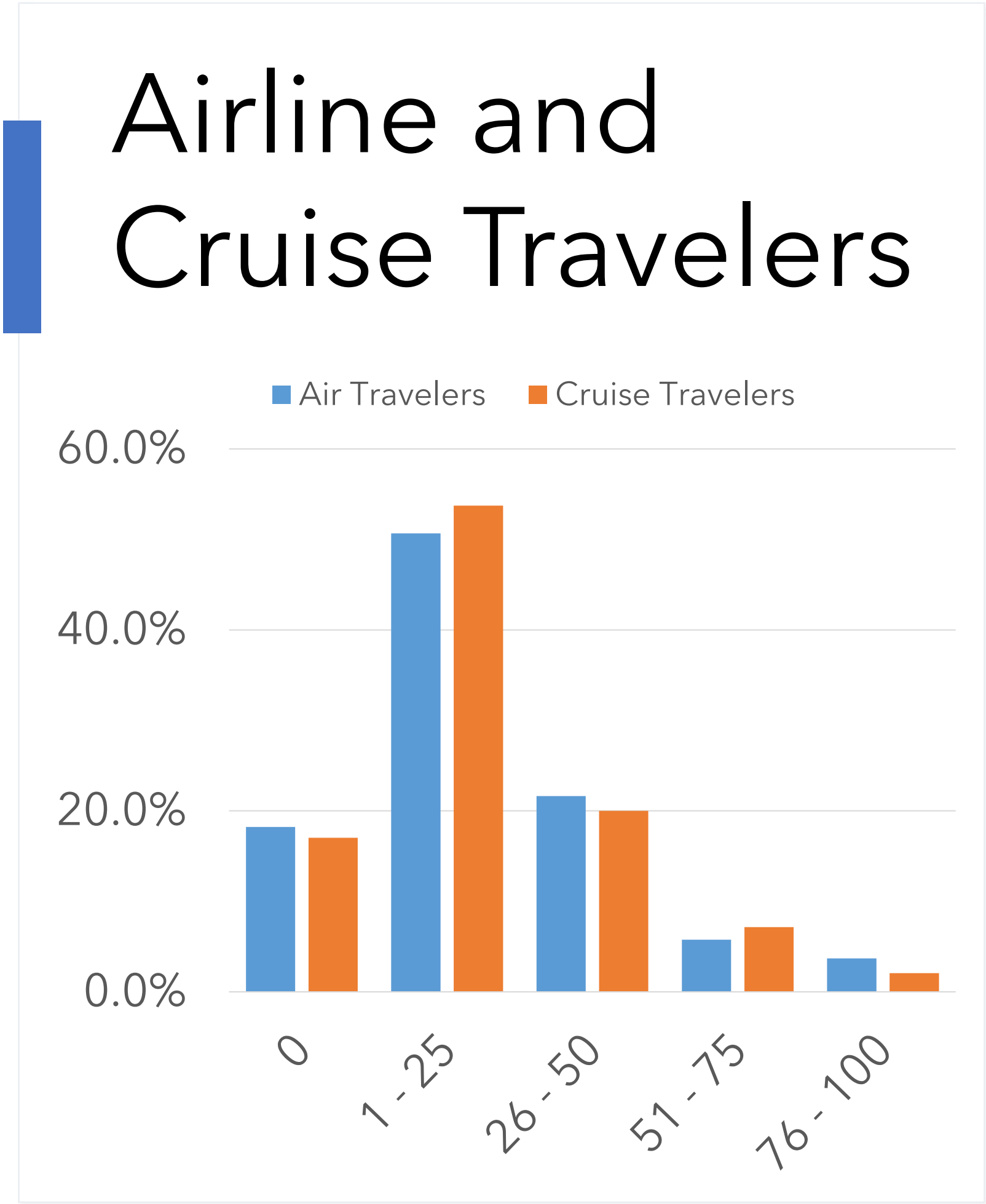
Healthy Travel Outlook

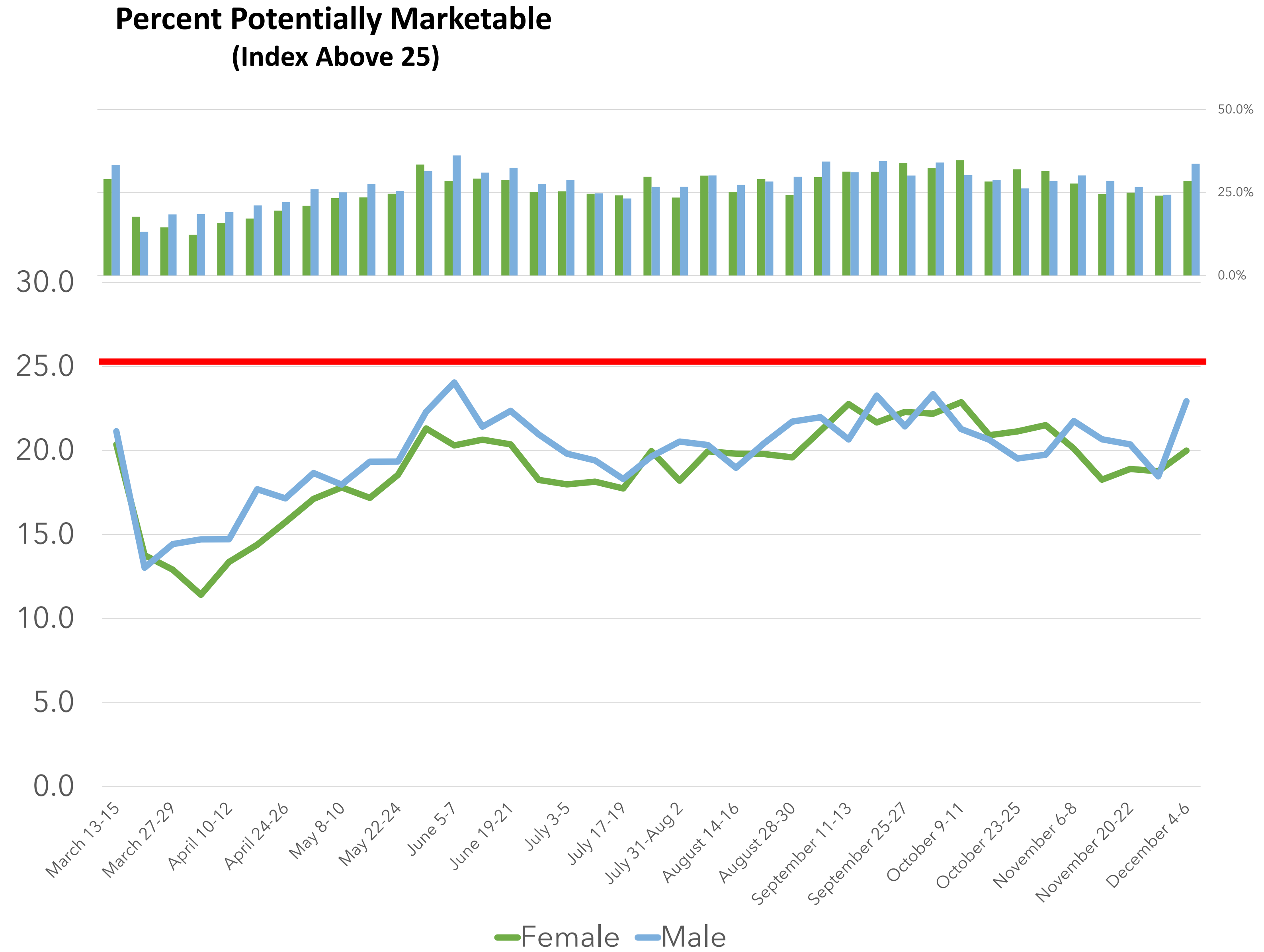
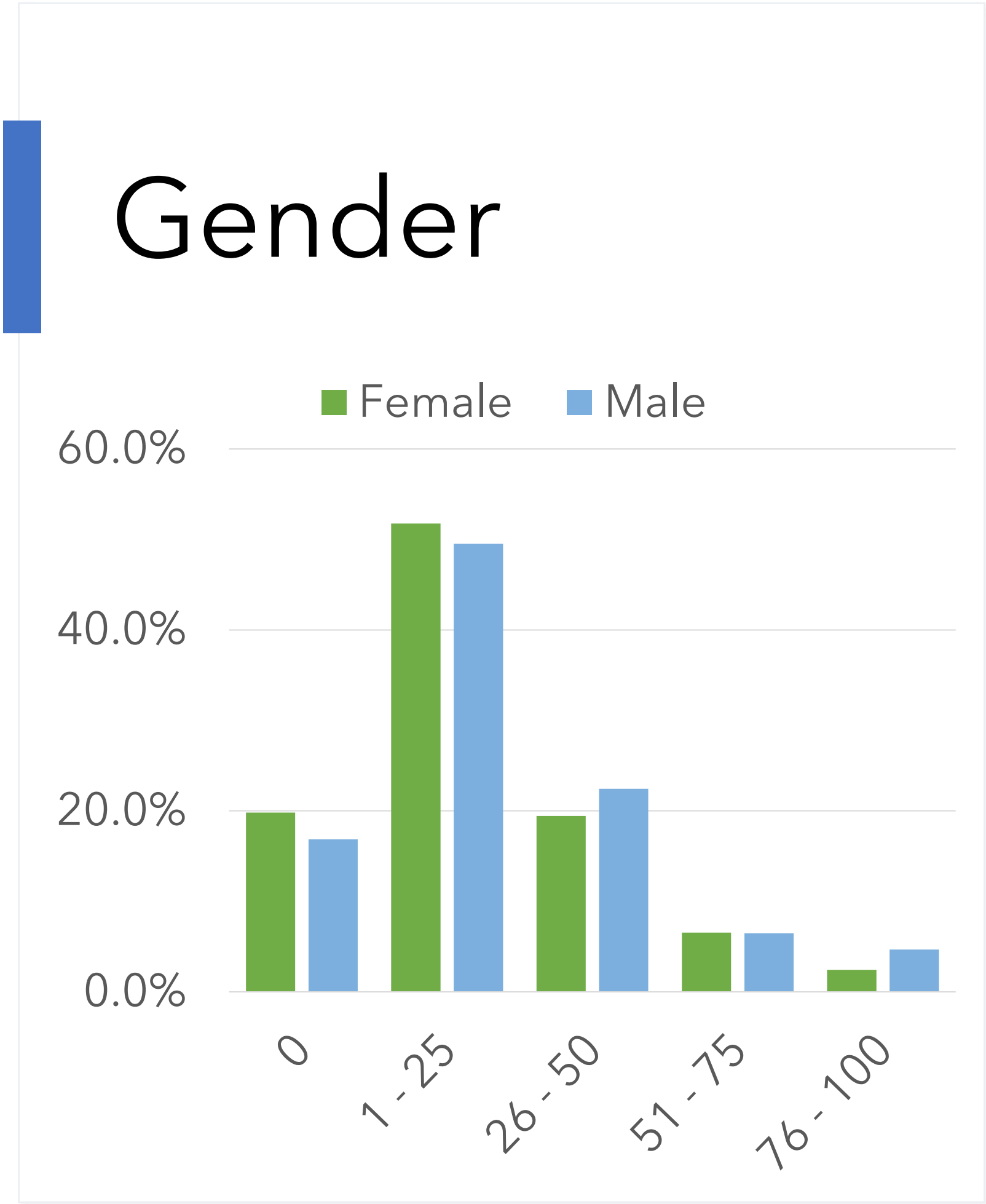


Travel Outlook



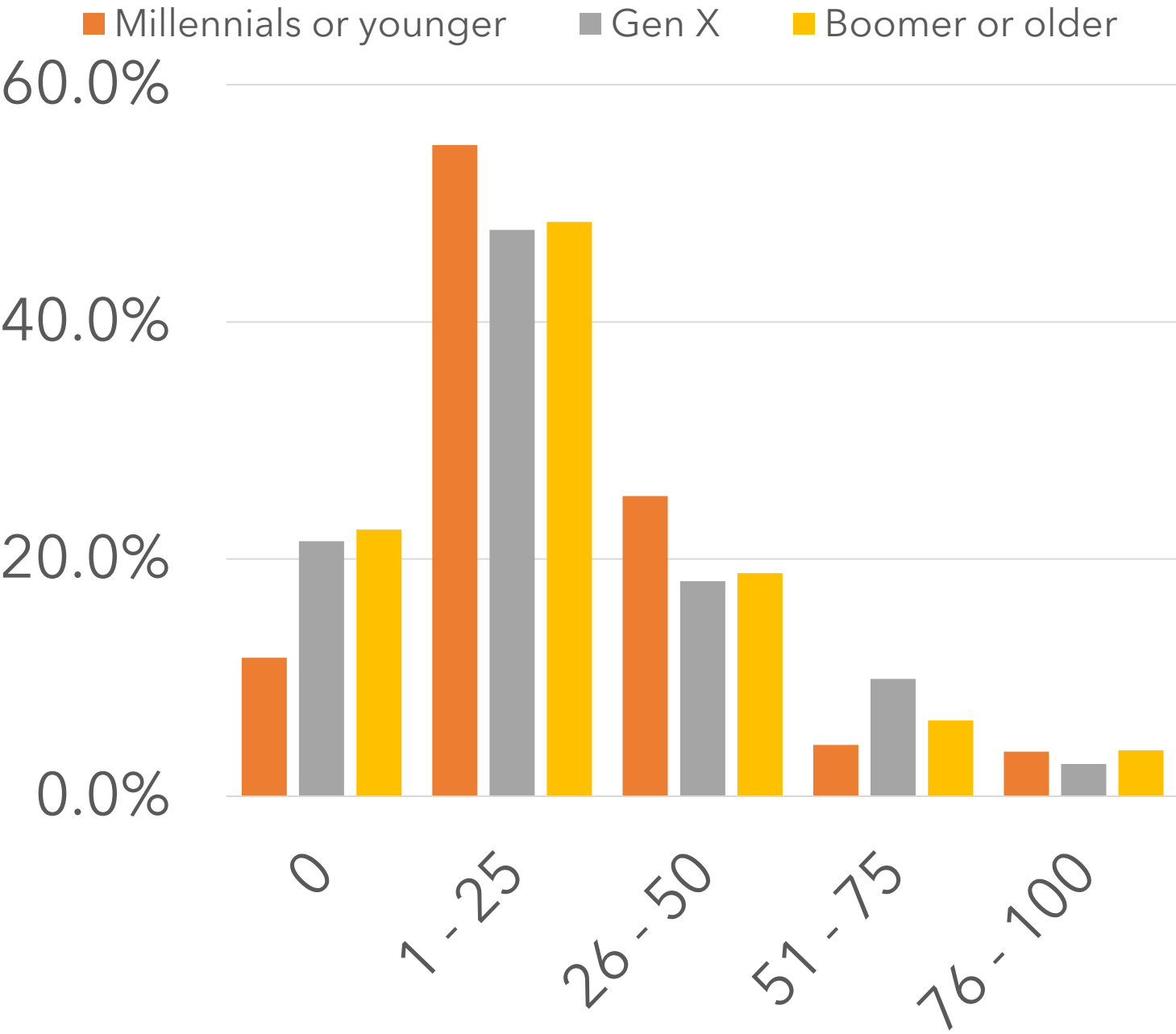




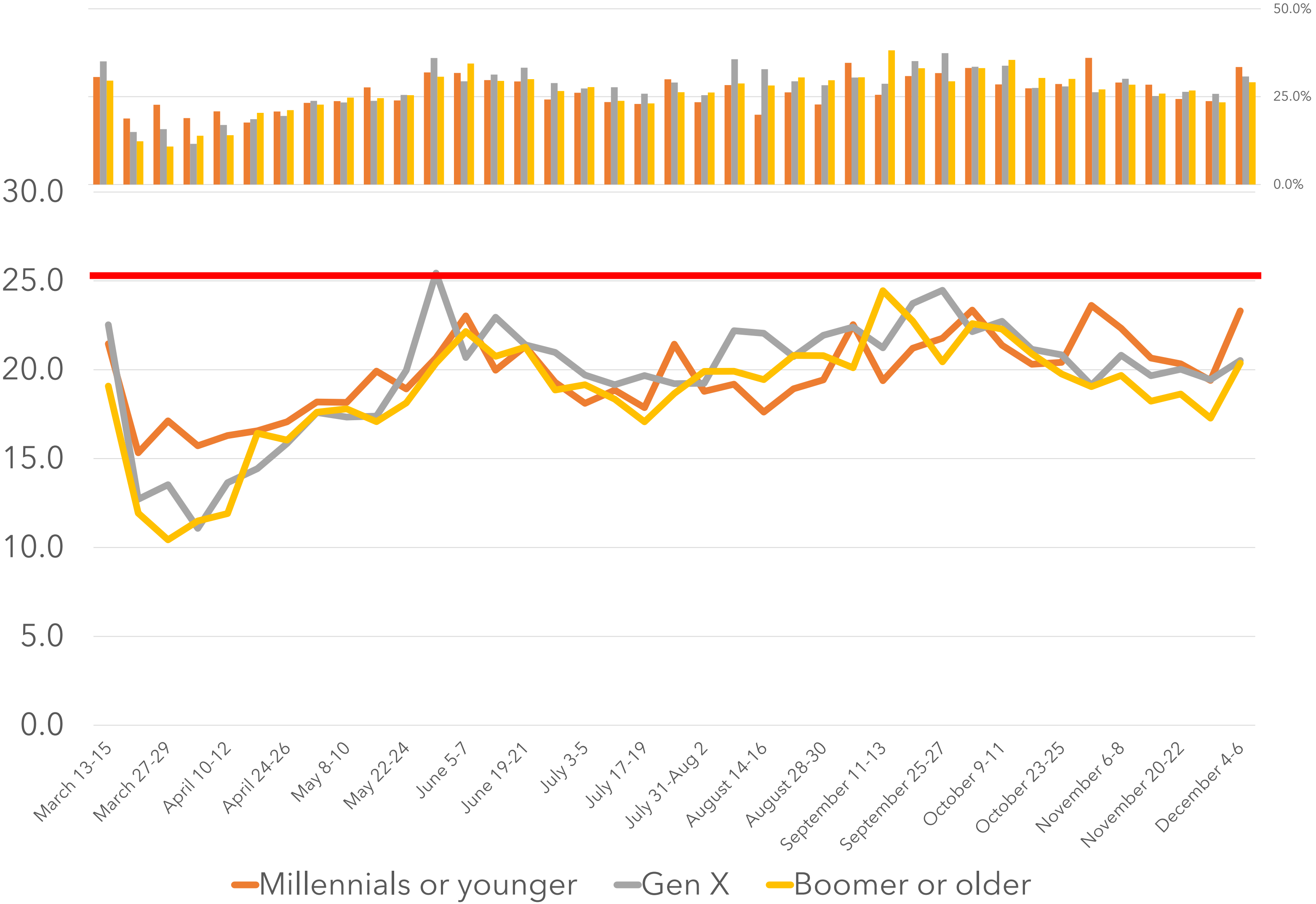


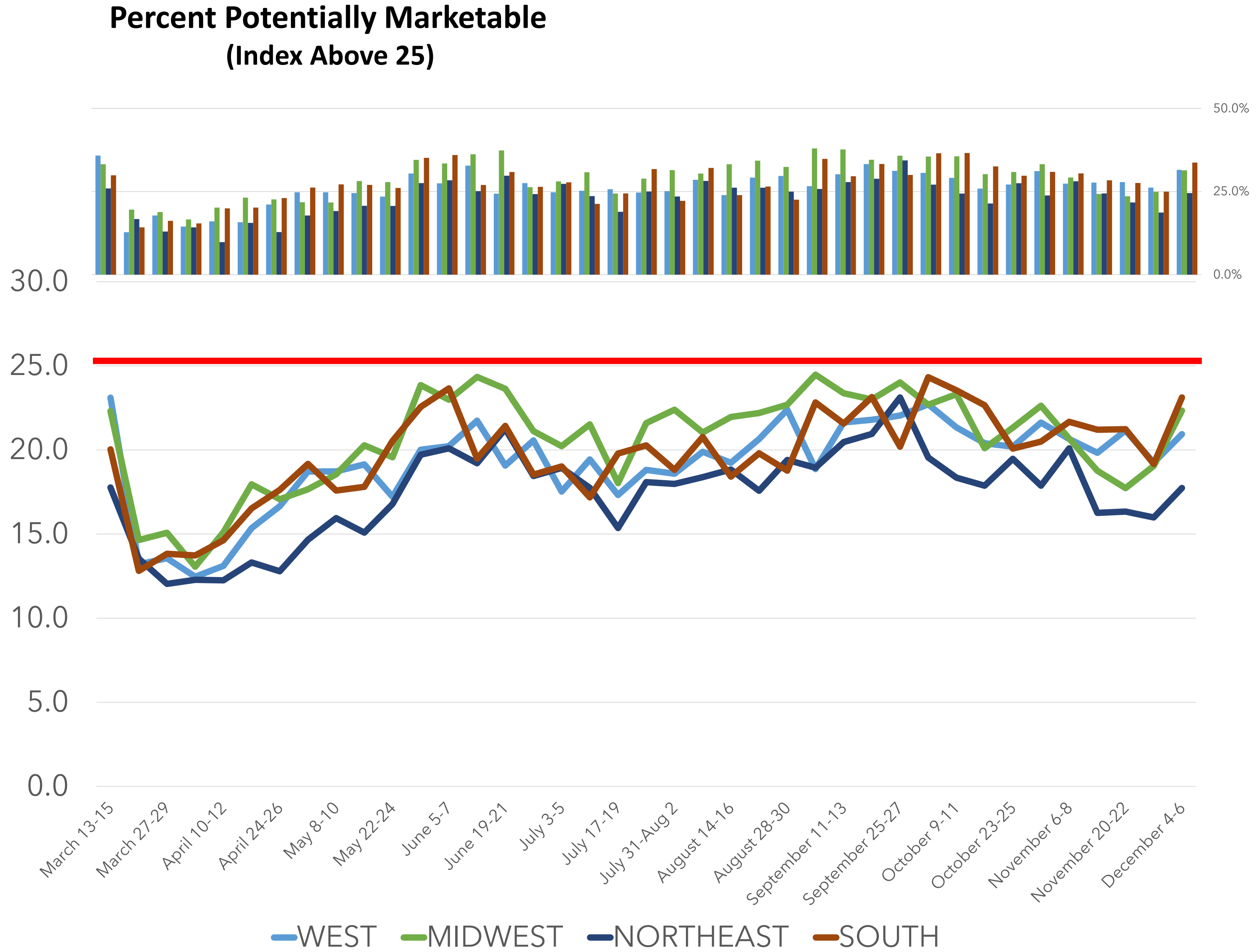
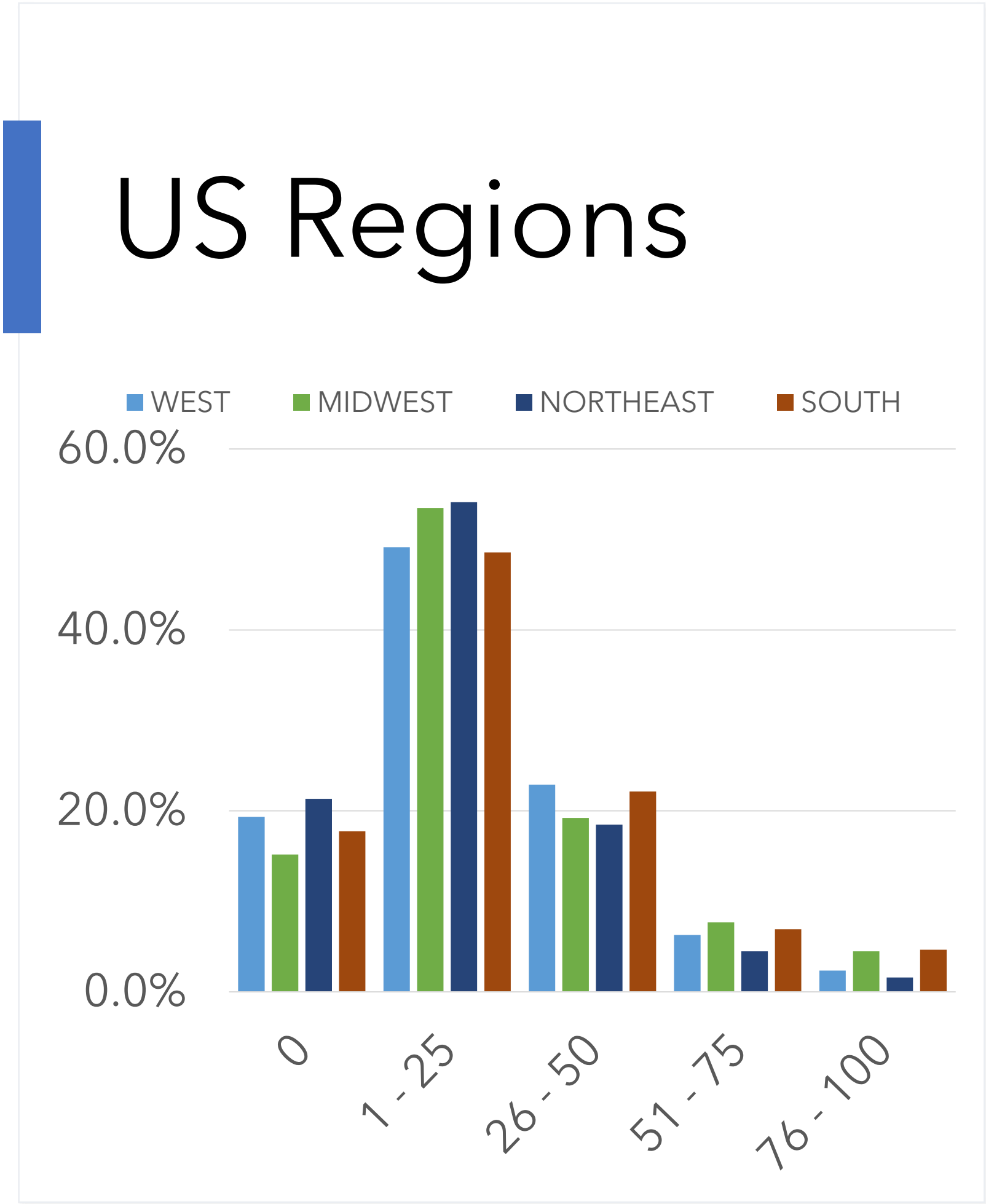


Generation



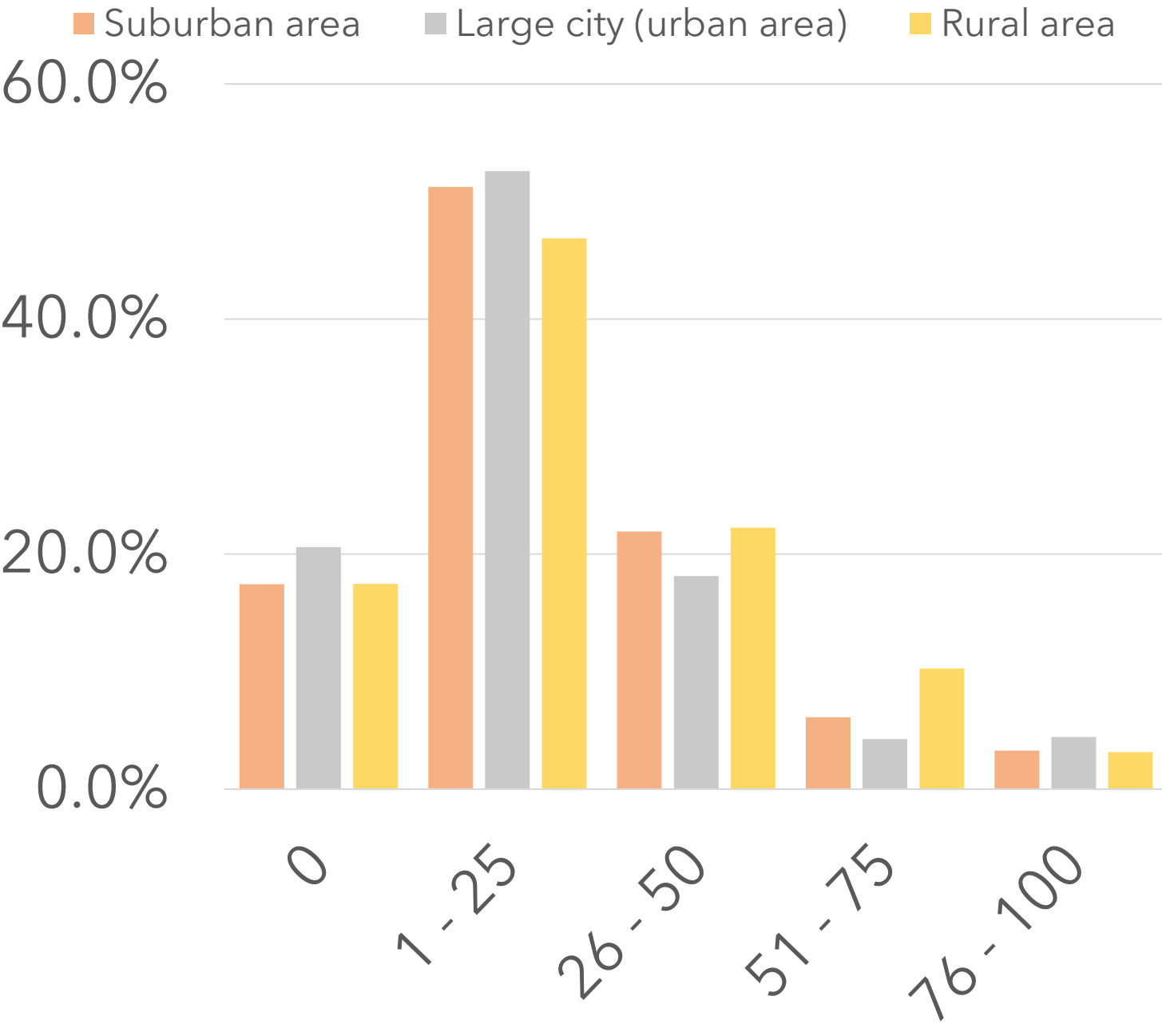
Percent Potentially Marketable (Index Above 25)



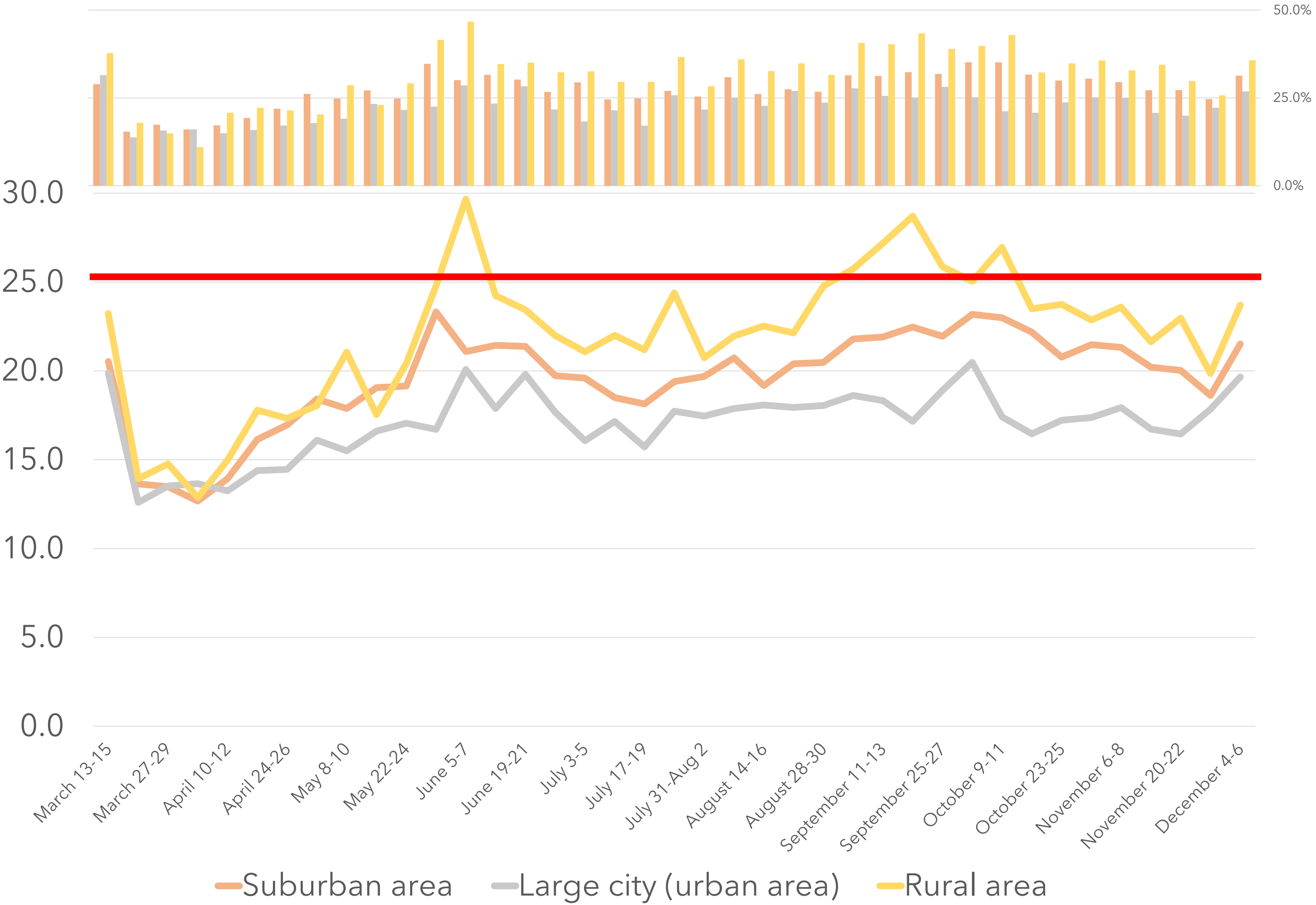


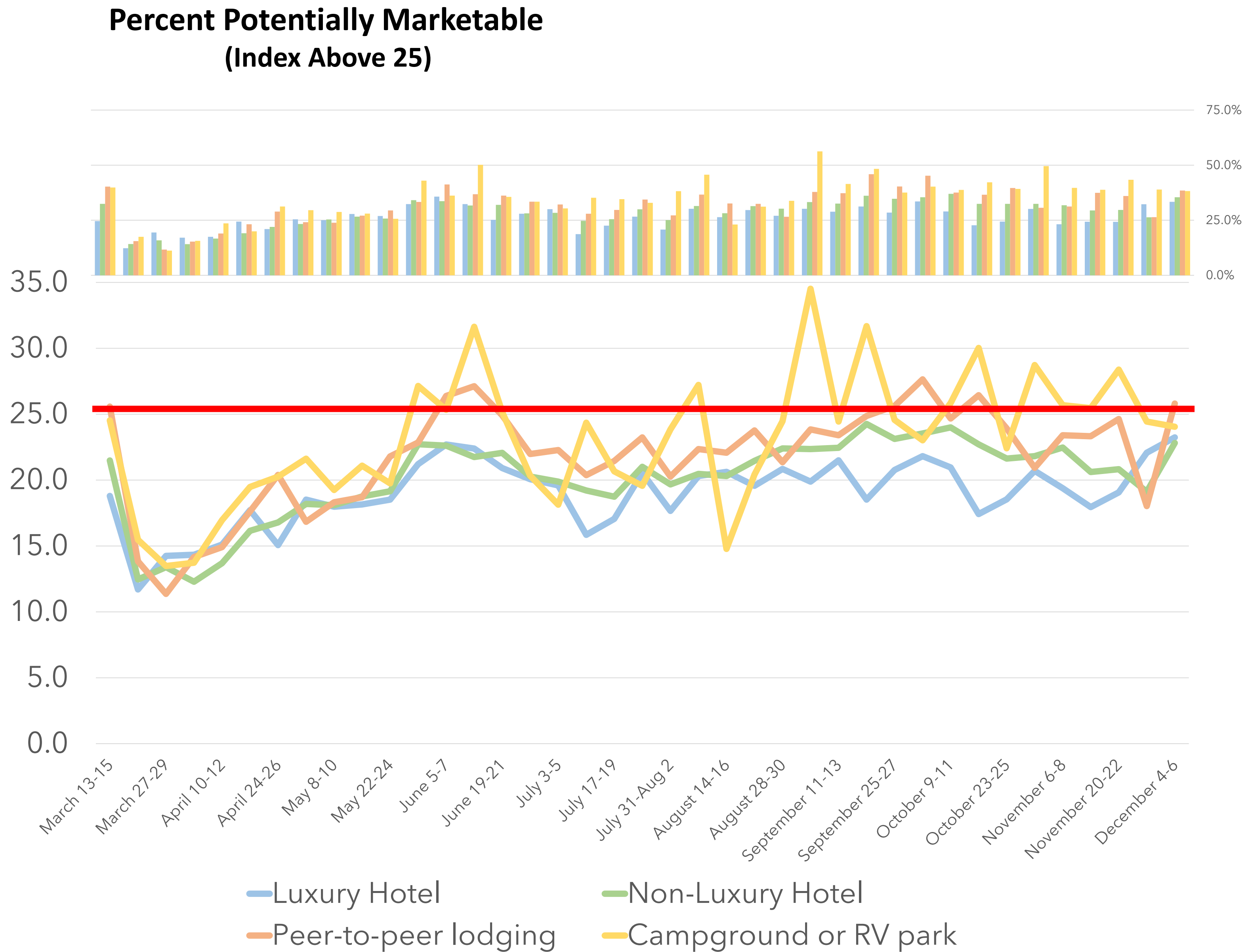
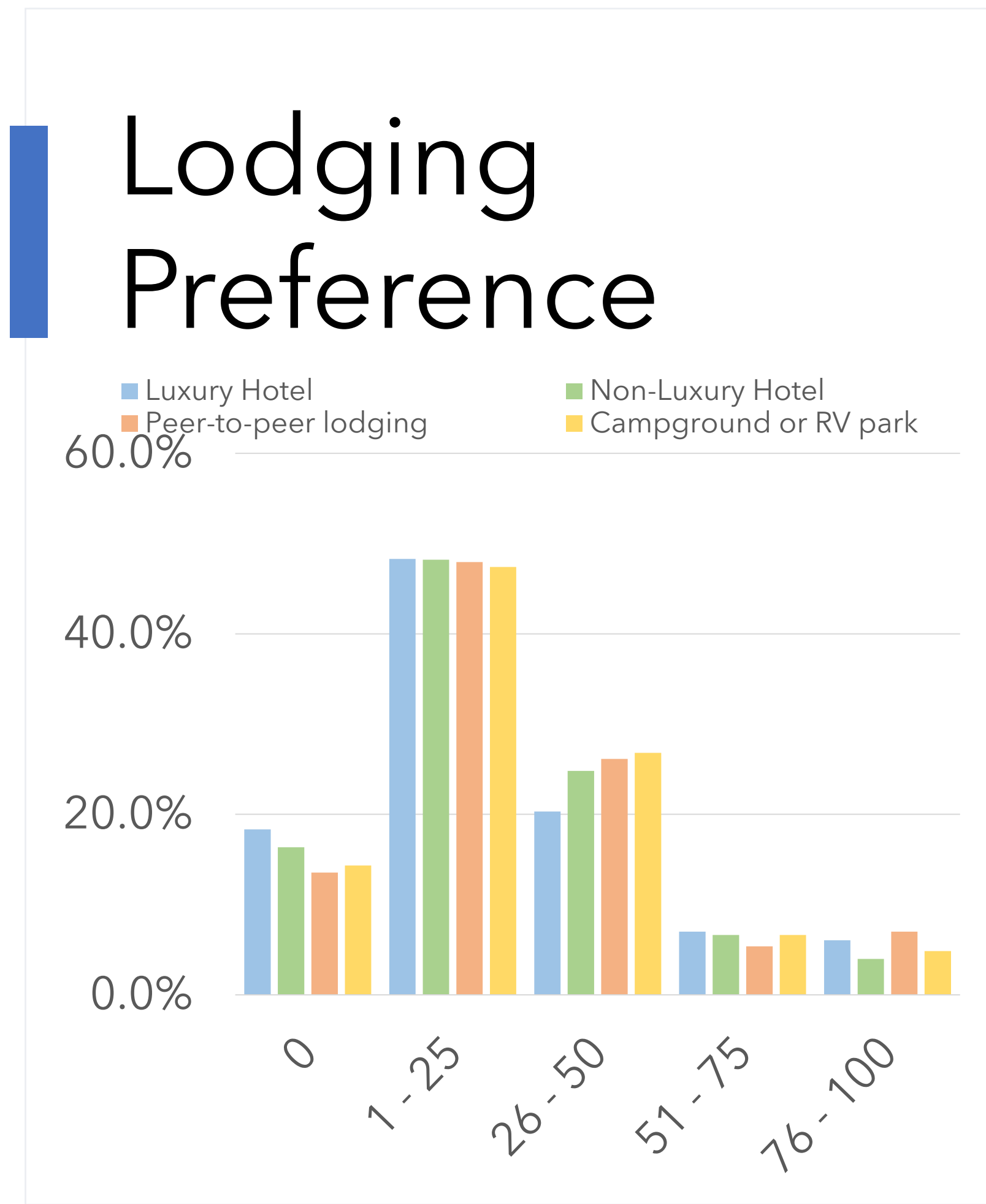


Residence Type



Percent Potentially Marketable (Index Above 25)







Questions?
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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



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Visitor Activity Analysis & Segmentation

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