



CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings
November 17th, 2020

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 and economic analysis.

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.

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- Visitor Activity Analysis & Segmentation
- Persona Research
- Resident + Stakeholder Research
- Advertising Testing
- Grant Support

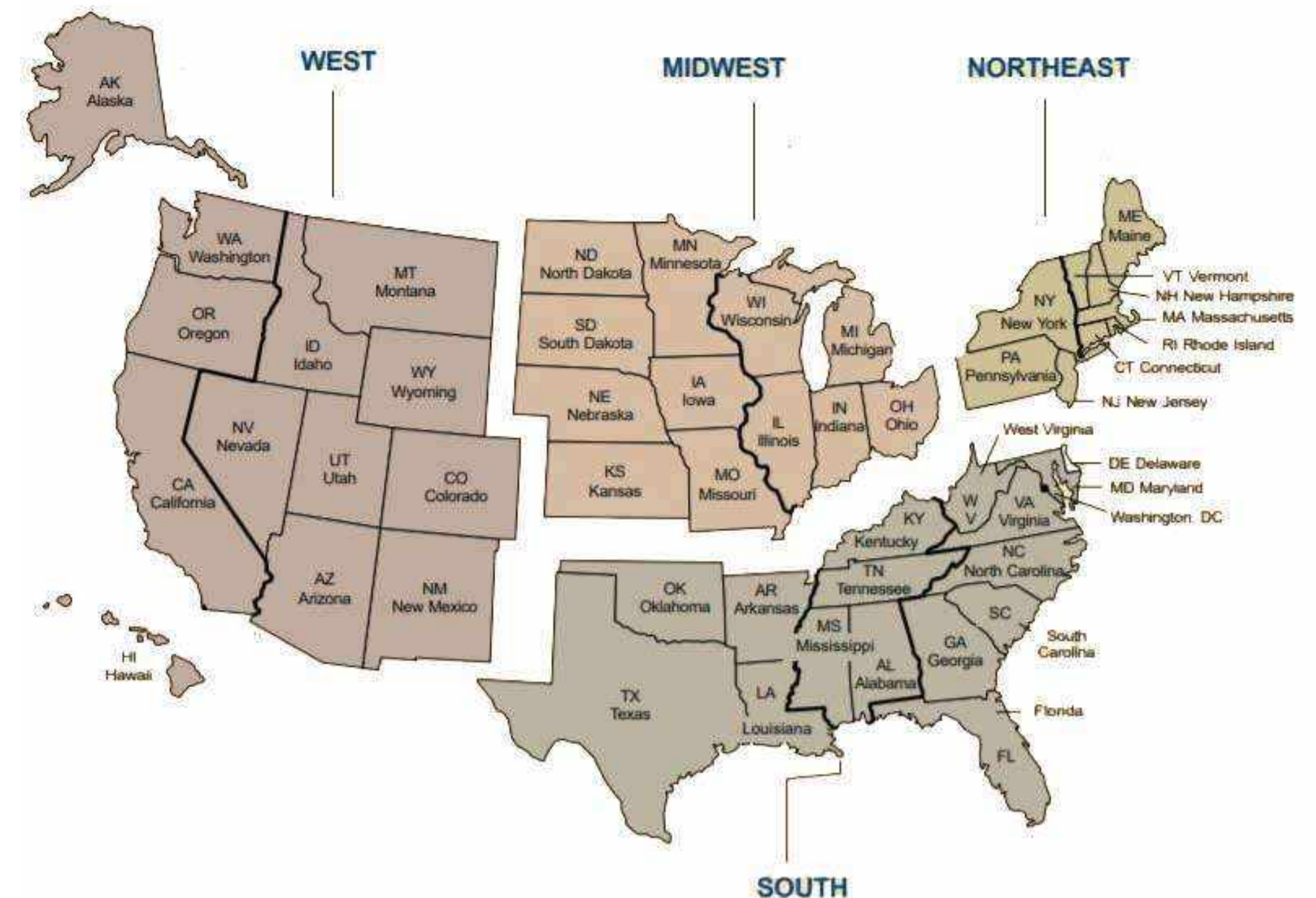
info@destinationanalysts.com



RESEARCH OVERVIEW & METHODOLOGY

- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 36 data (fielded November 13th-15th) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S.Regions



Independent Unbiased Research



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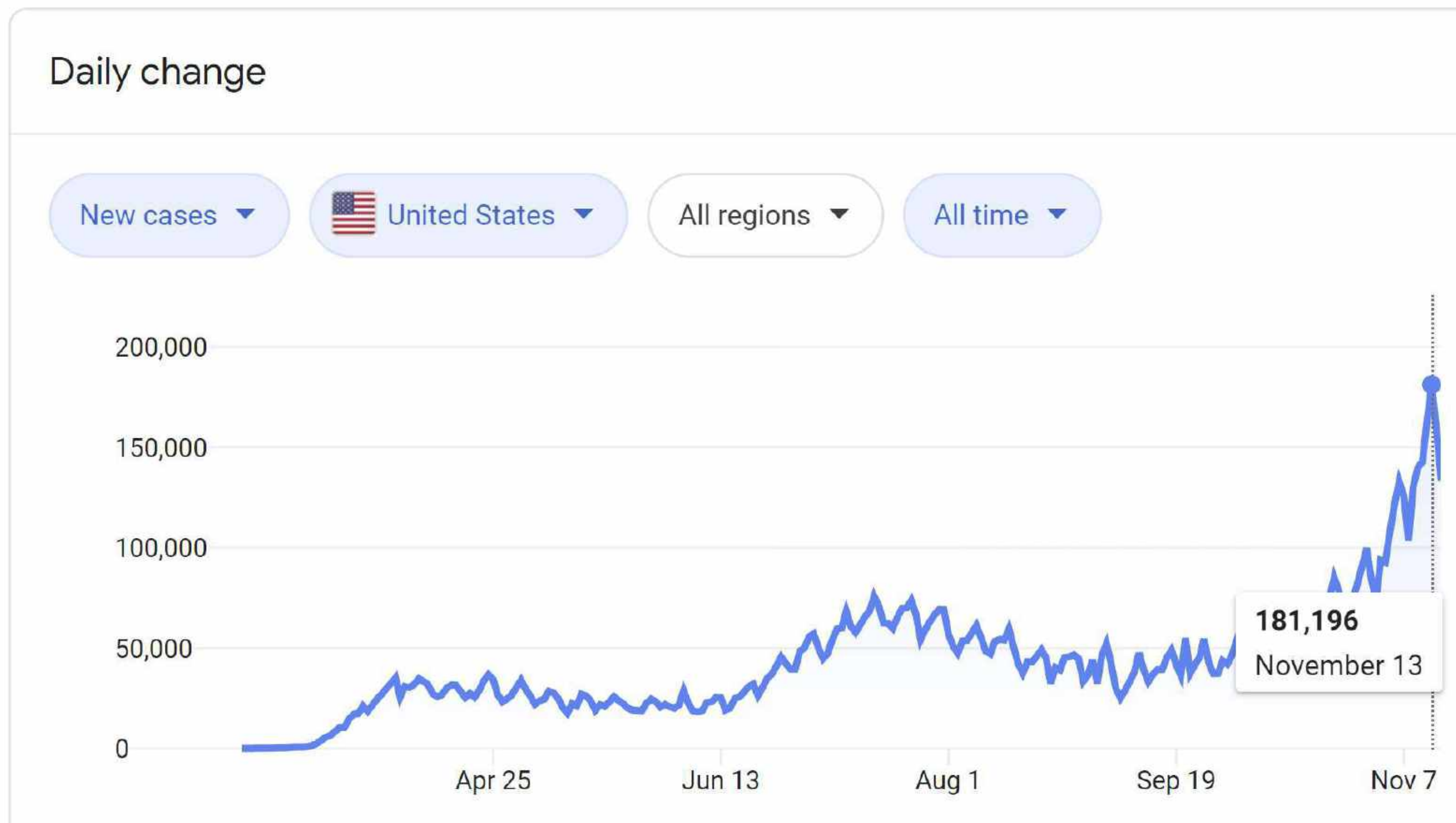
DestinationAnalysts.com/Support

A group of hands holding light bulbs, symbolizing ideas and innovation.

**Presentation deck and webinar
recording available on our website:**

DestinationAnalysts.com/covid-webinars





Covid Is Resurging, and This Time It's Everywhere

Pervasive spread in smaller communities fuels nationwide case record, though mortality rates are lower than in the spring



Medical professionals at United Memorial Medical Center in Houston check on a Covid-19 patient who was flown in from El Paso last week. **CREDIT:** CALLAGHAN O'HARE/REUTERS

Governors ratchet up restrictions ahead of Thanksgiving

By DAVID EGGERT and RACHEL LA CORTE 2 hours ago



Click to copy

From California to Pennsylvania, governors and mayors across the U.S. are ratcheting up COVID-19 restrictions amid the record-shattering resurgence of the virus that is all but certain to get worse because of holiday travel and family gatherings over Thanksgiving.

HEALTH

Cancel Thanksgiving

This is a moment for creativity.

JAMES HAMBLIN 6:45 PM ET



6:23 ↗



Pfizer says COVID-19 vaccine is looking 90% effective

By LAURAN NEERGAARD and LINDA A. JOHNSON November 10, 2020



Click to copy

RELATED TOPICS

Donald Trump

Business

U.S. News

Pfizer Inc. said Monday that its COVID-19 vaccine may be a remarkable 90% effective, based on early and incomplete test results that nevertheless brought a big burst of optimism to a world desperate for the means to finally bring the catastrophic outbreak under control.

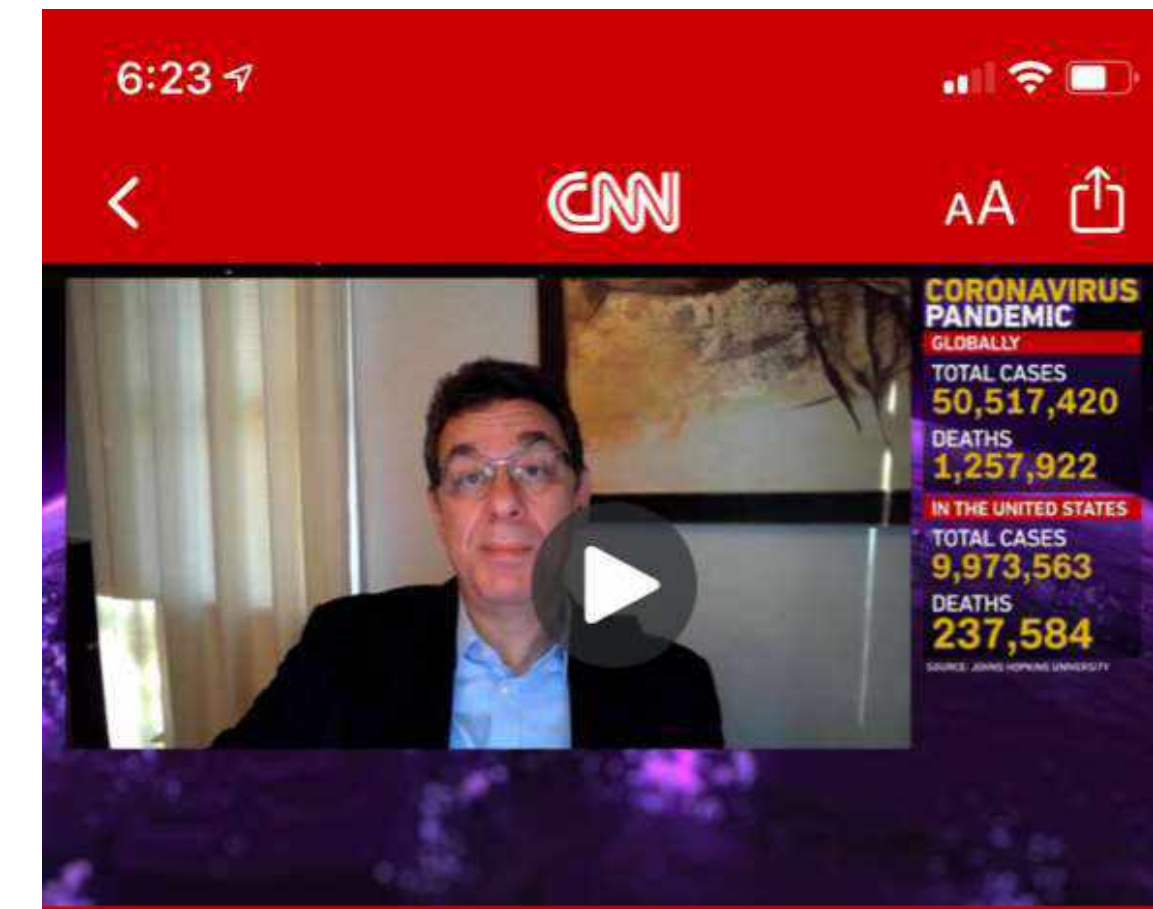
The announcement came less than a week after an election seen as a referendum on President Donald Trump's handling of the scourge, which has killed more than 1.2 million people worldwide, including almost a quarter-million in the United States alone.

"We're in a position potentially to be able to offer some hope," Dr. Bill Gruber, Pfizer's senior vice president of clinical development, told The Associated Press. "We're very encouraged."

APPLE NEWS SPOTLIGHT

The coronavirus-vaccine good news we've been waiting for — and more uplifting stories

16m ago



How a Covid-19 vaccine could change travel for good

Julia Buckley, CNN

4:47 AM EST November 14, 2020

It was the good news that gave the world hope.

On November 9 it was announced that

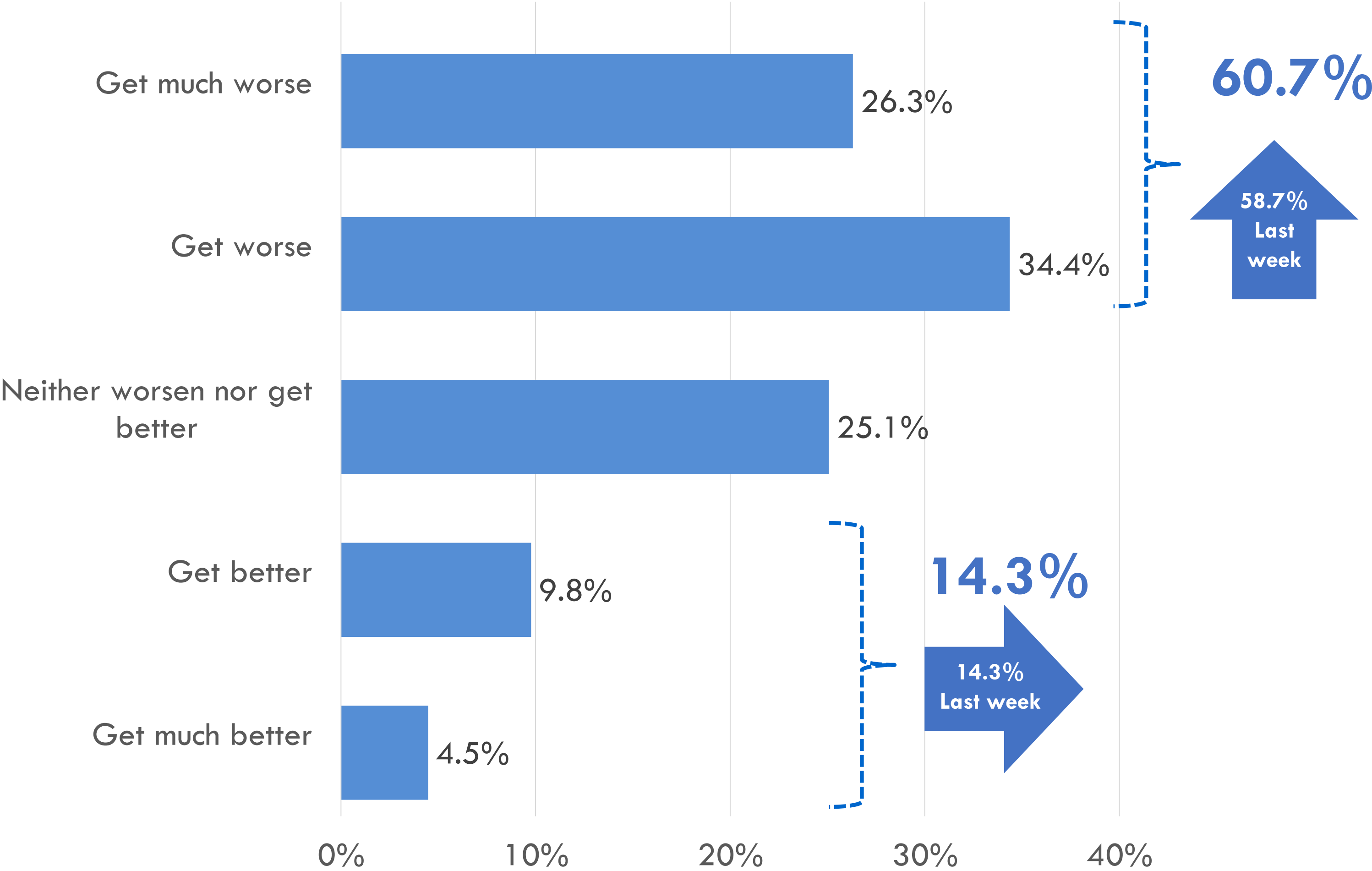


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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

In the next month the coronavirus situation will _____

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

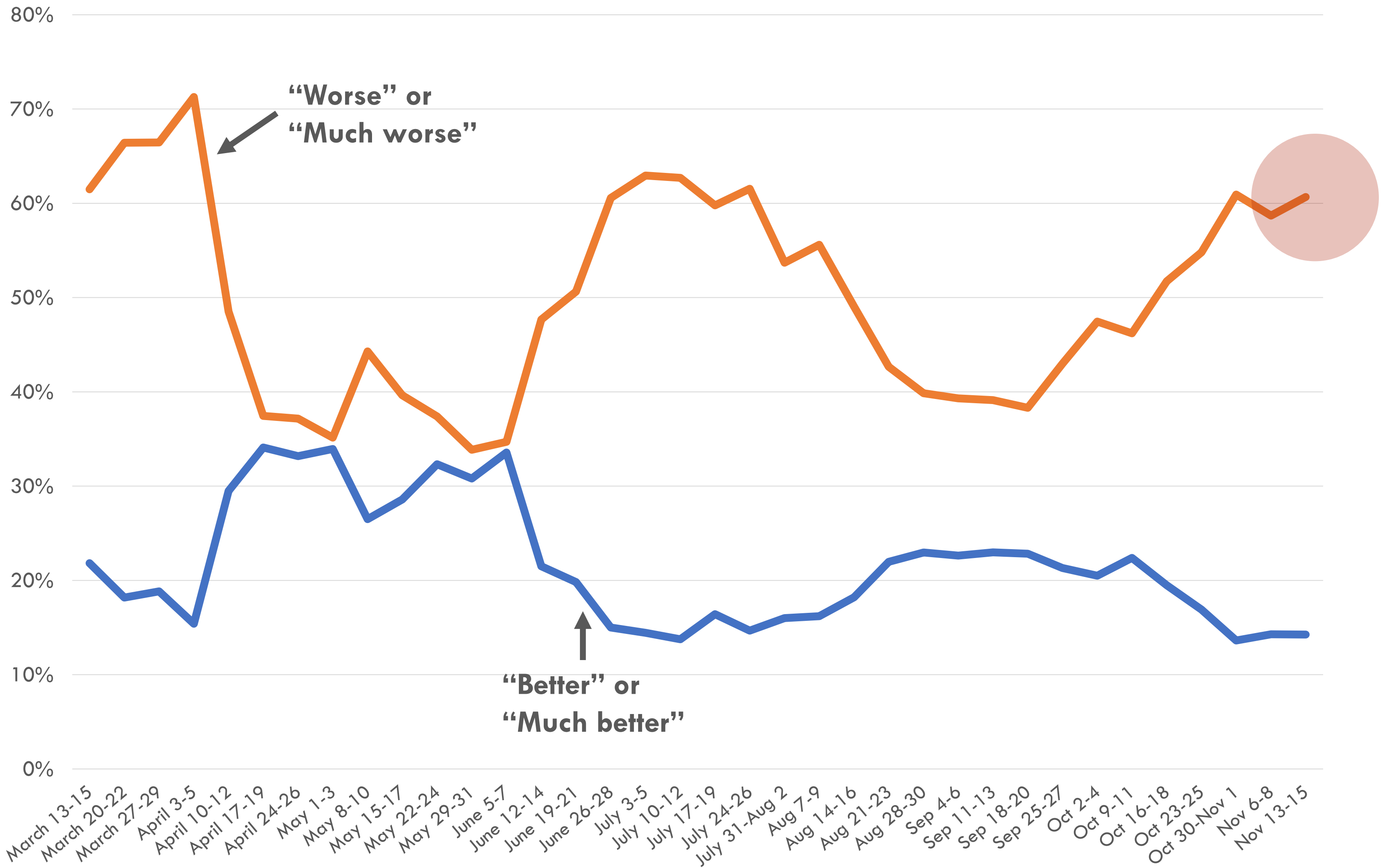


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-36)

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 _____

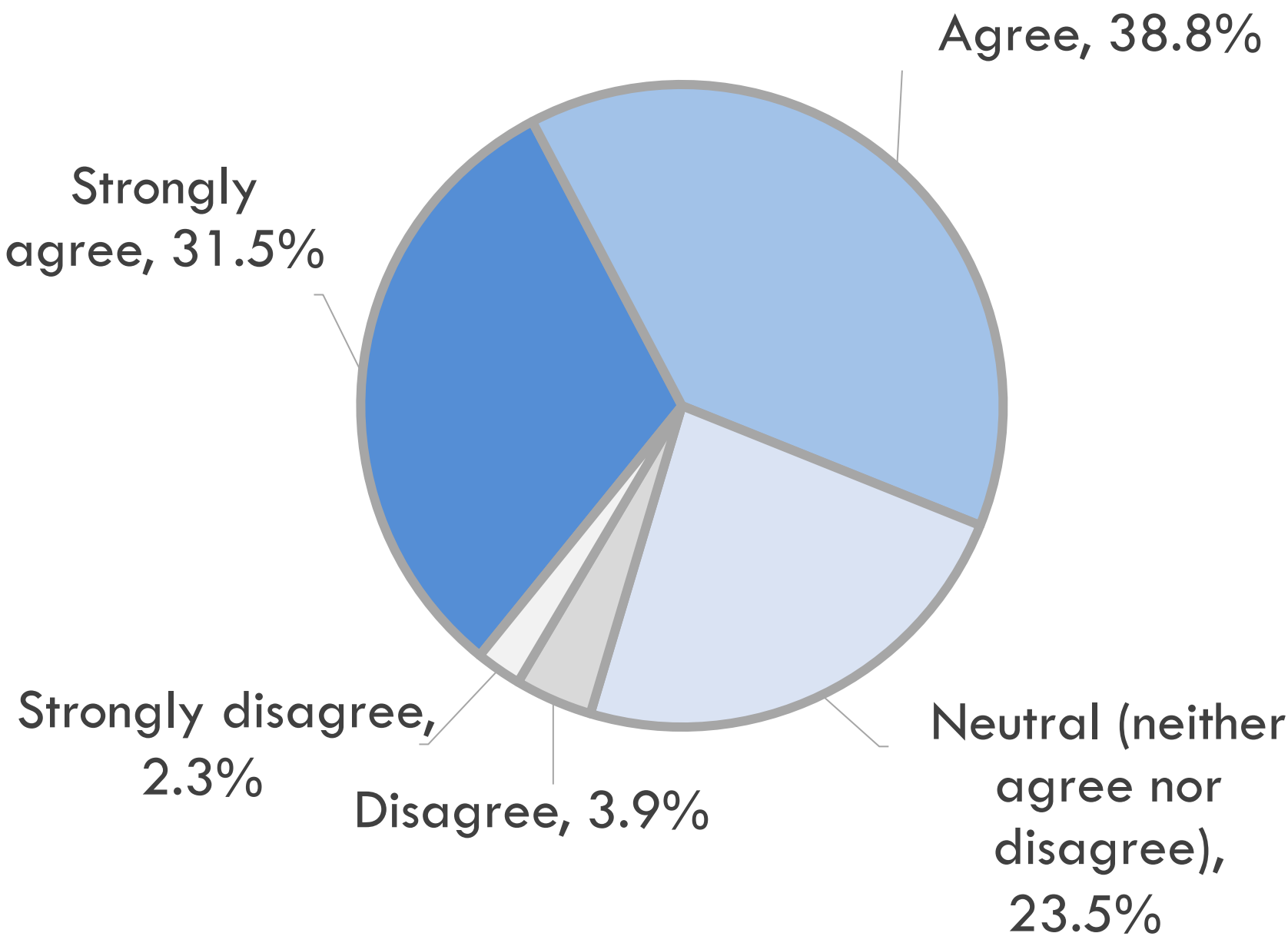
(Base: Waves 1-36. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)



EXPECTATIONS FOR THE CORONAVIRUS' COURSE IN COLD WEATHER

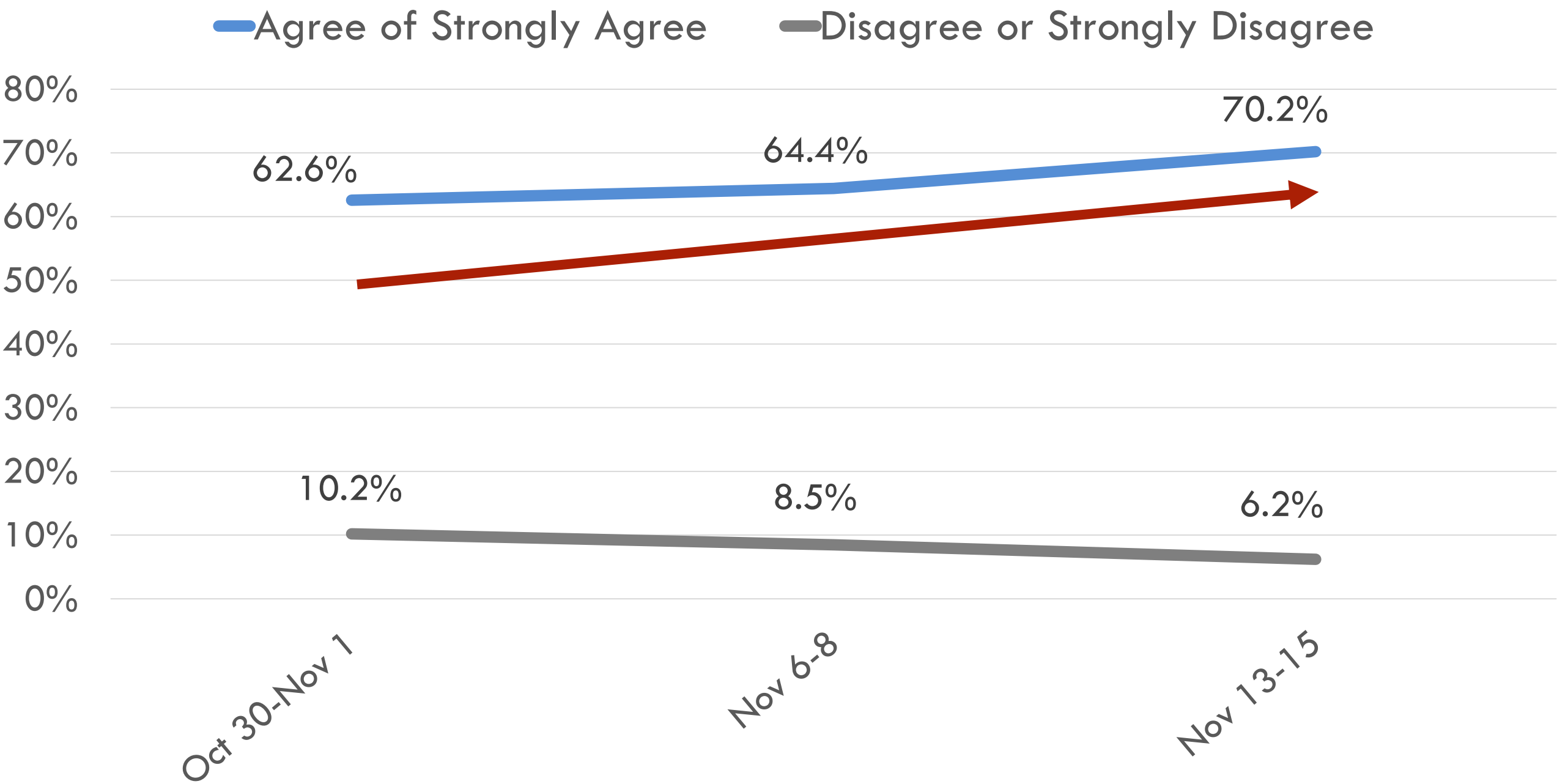
How much do you agree with the following statement?

Statement: I expect the Coronavirus will thrive in the upcoming cold weather.



(Base: Waves 34-36 data. All respondents, 1,203, 1,205 and 1,206 completed surveys.)

Historical data



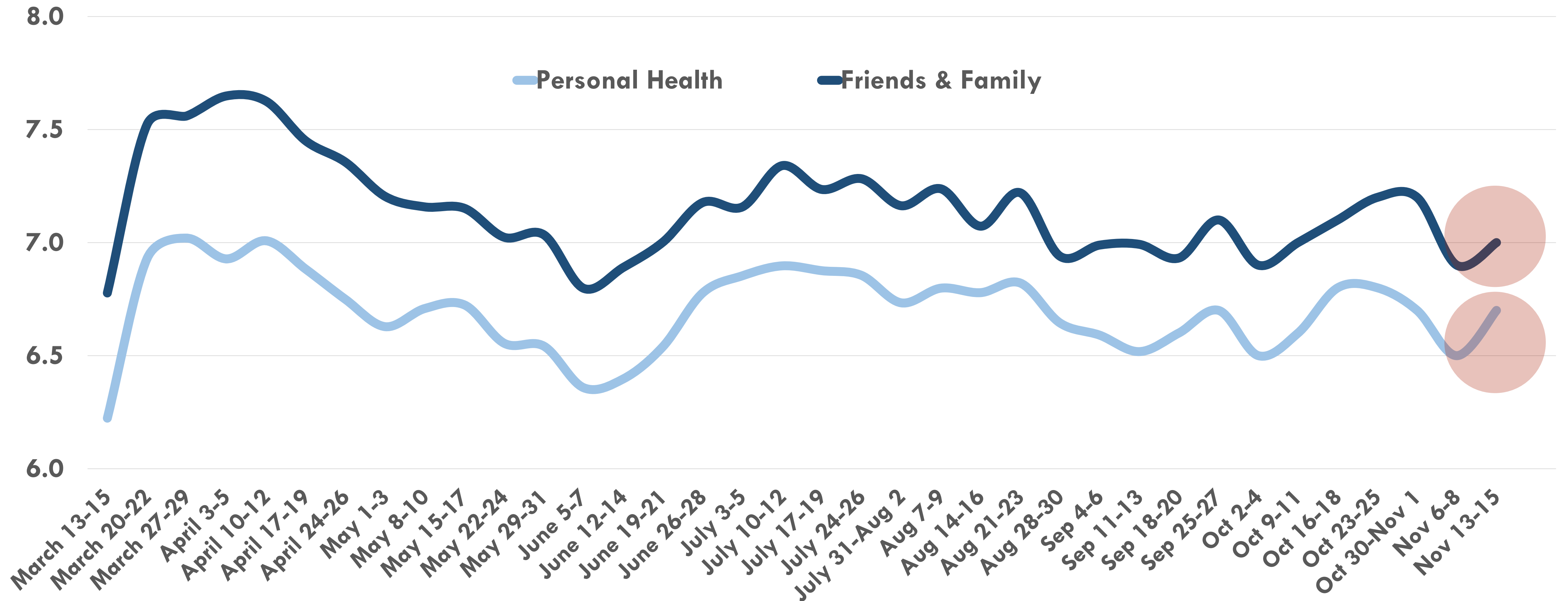
A woman with long brown hair, wearing glasses, a blue surgical mask, a white turtleneck, a brown coat, and blue jeans, stands in an airport security line. She is holding a yellow suitcase with her right hand and a small red passport in her left. The background shows a blurred airport terminal with other travelers and security equipment. The text "THE IMPACT OF THE SURGE ON TRAVEL" is overlaid in the center of the image.

THE IMPACT OF THE SURGE ON TRAVEL

CONCERN LEVELS ABOUT CONTRACTING COVID-19

AS OF NOVEMBER 15TH

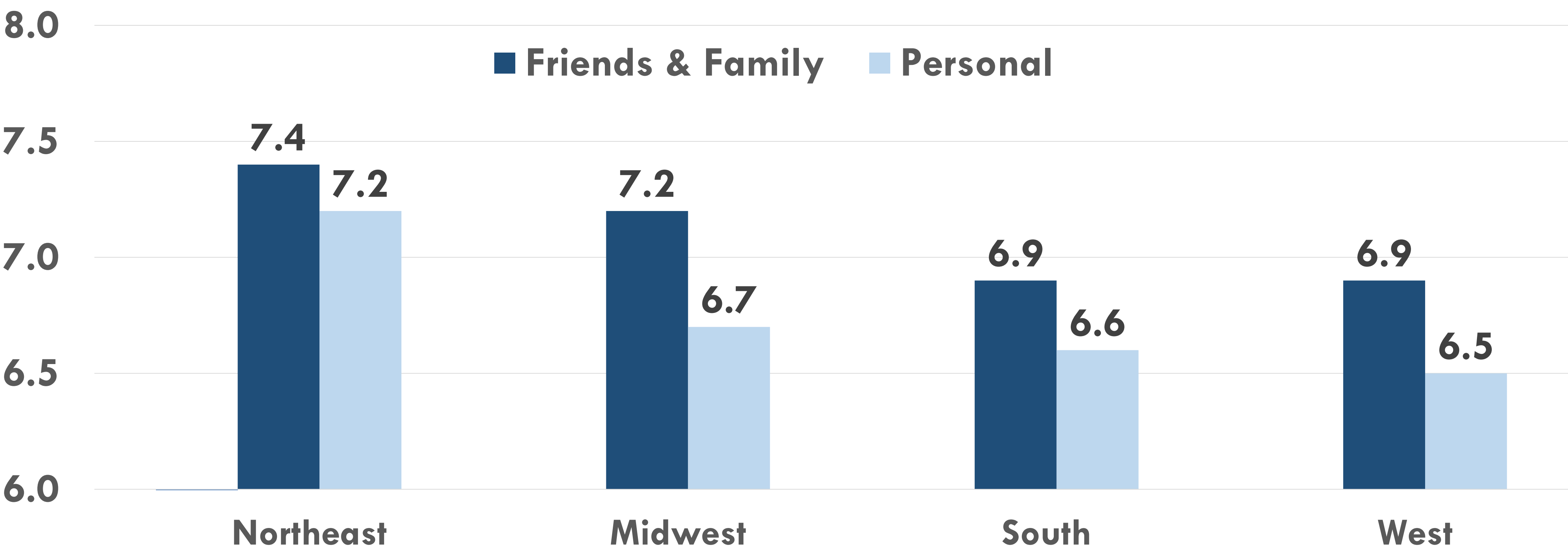
HISTORICAL DATA
(AVERAGE SCORE ON AN 11-POINT SCALE)



CONCERN LEVELS ABOUT CONTRACTING COVID-19 BY REGION

AS OF NOVEMBER 15TH

REGIONAL DATA
(AVERAGE SCORE ON AN 11-POINT SCALE)

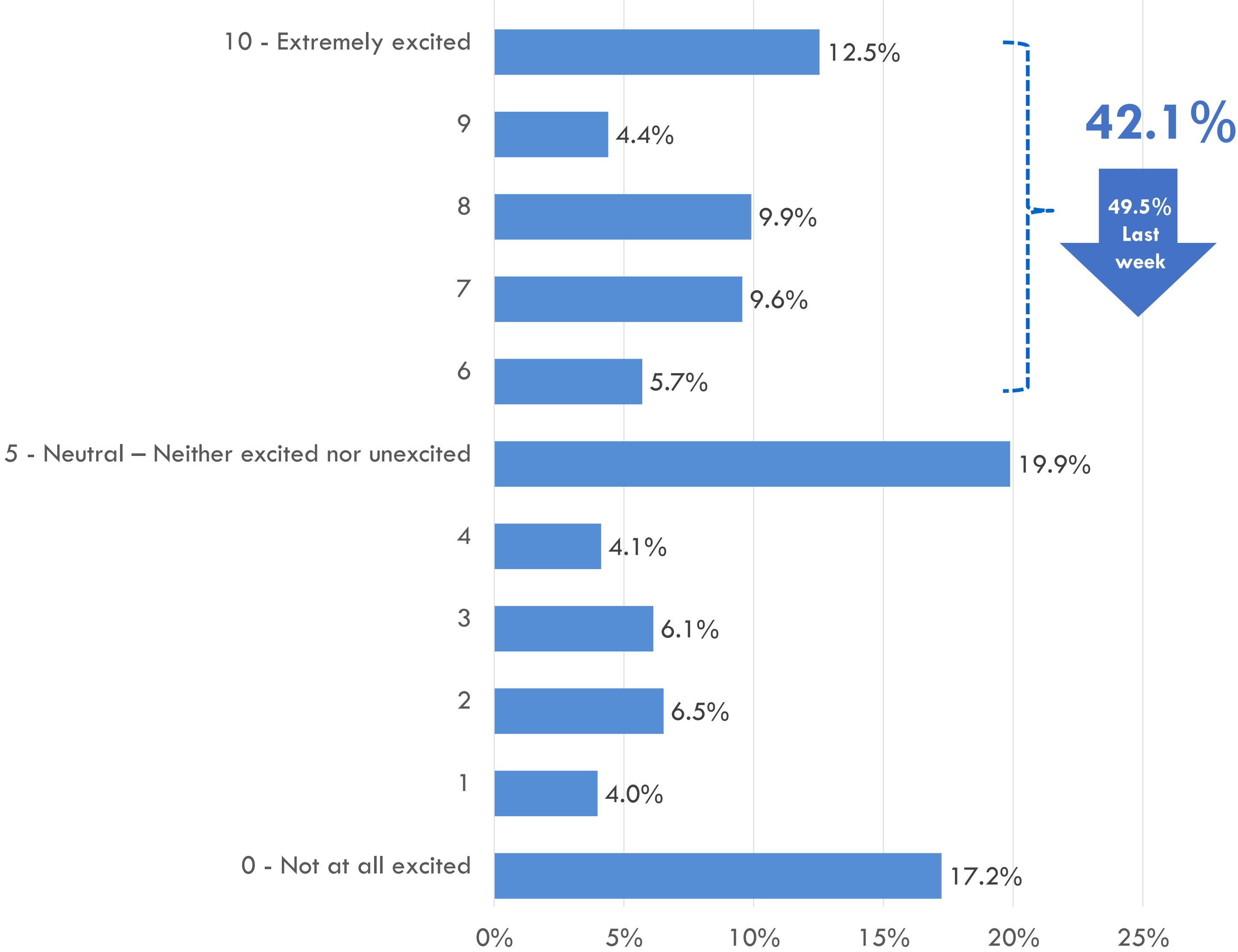


EXCITEMENT TO TRAVEL NOW

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

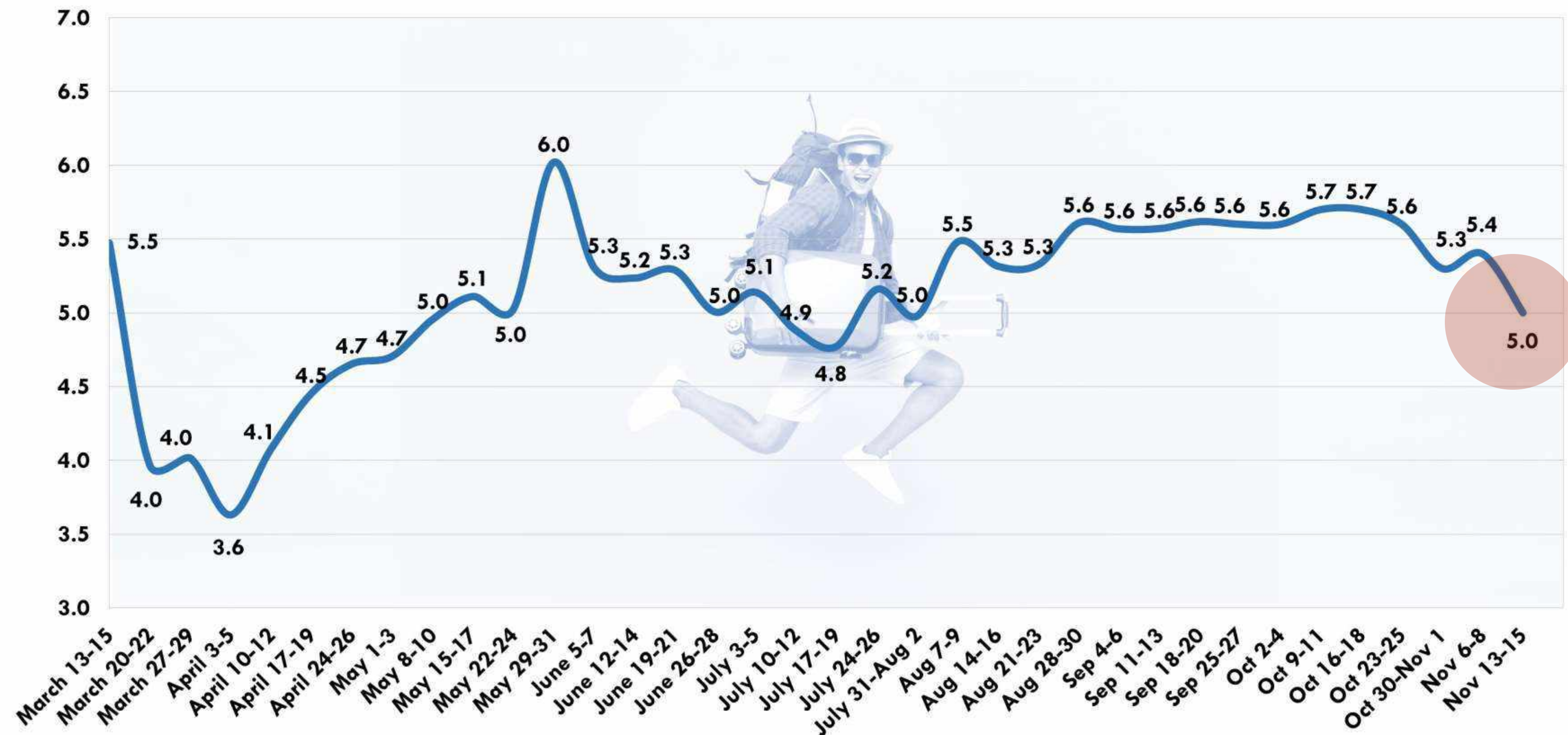


EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – NOVEMBER 15



EXCITED TO TRAVEL RIGHT NOW (AVERAGE SCORE ON AN 11-POINT SCALE)

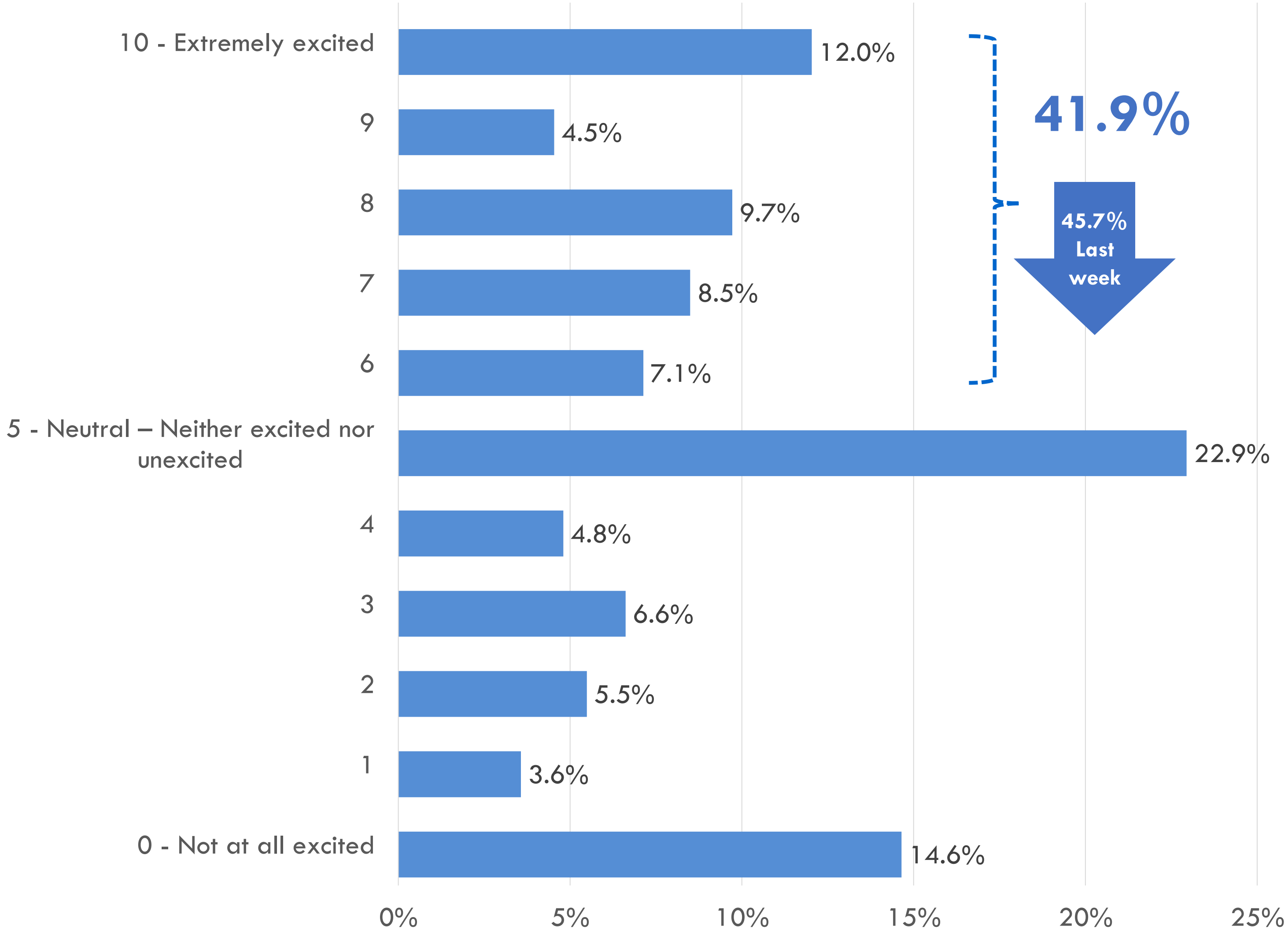


QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

OPENNESS TO TRAVEL INFORMATION

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

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

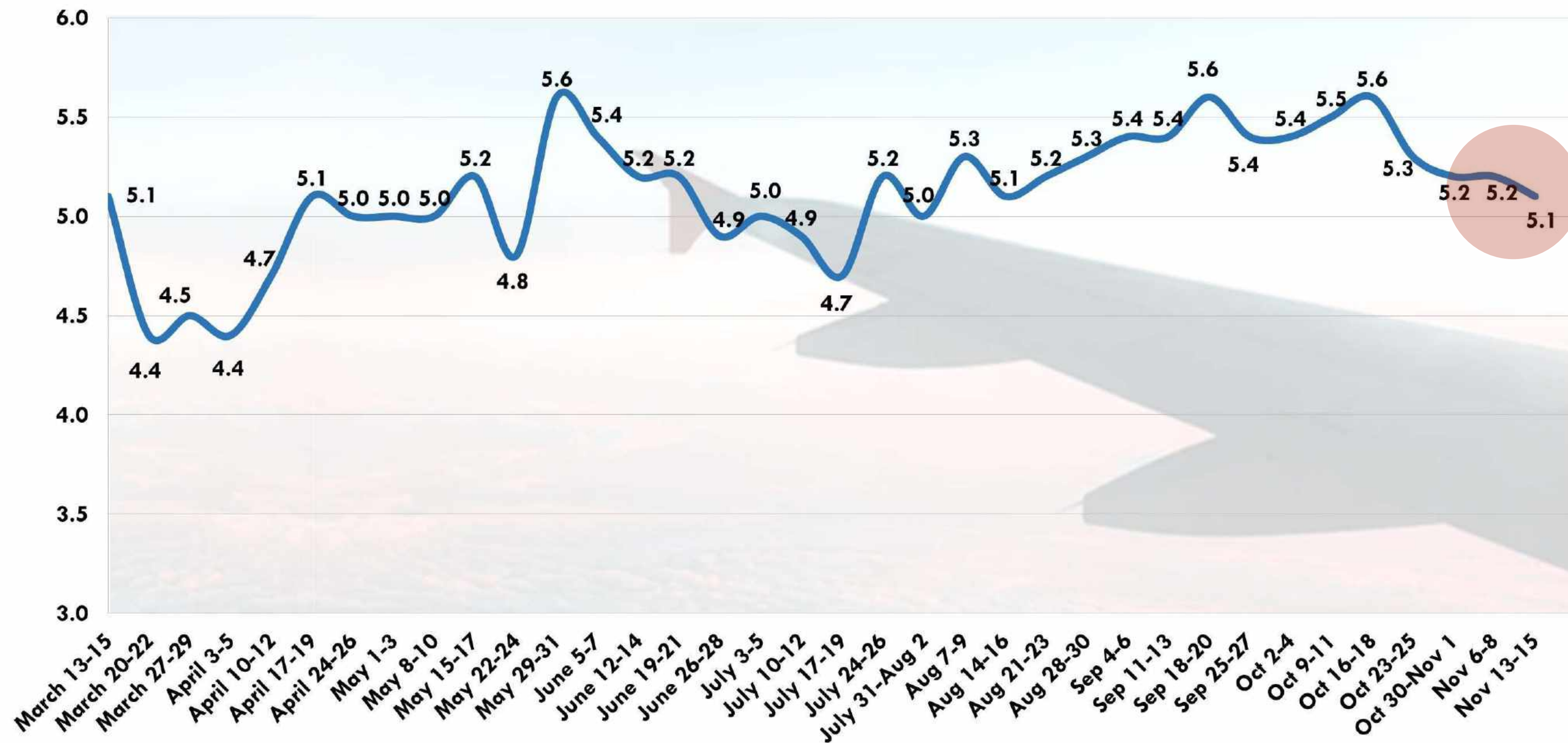


OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – NOVEMBER 15



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

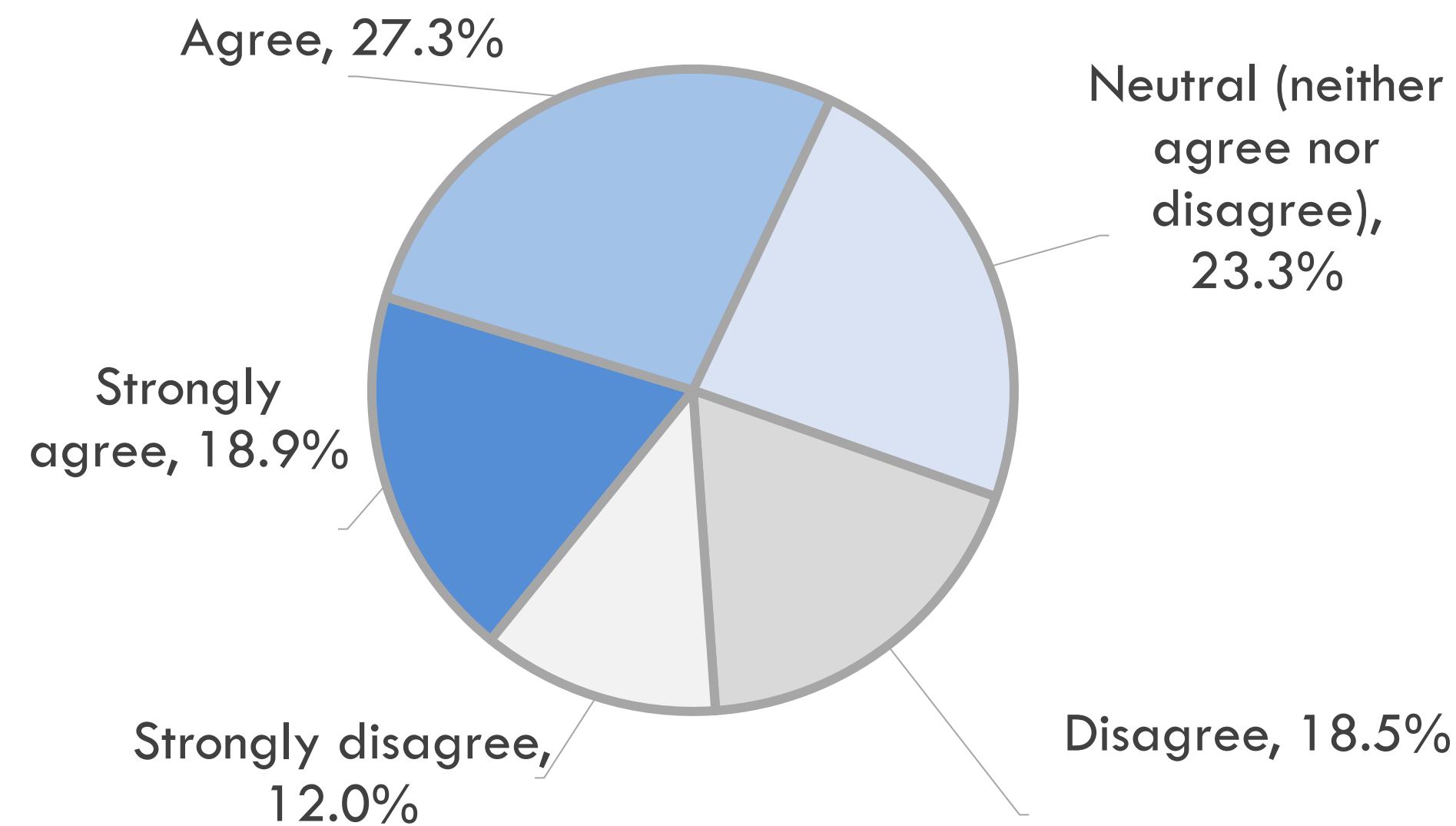


QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

LOSS OF INTEREST IN TRAVEL

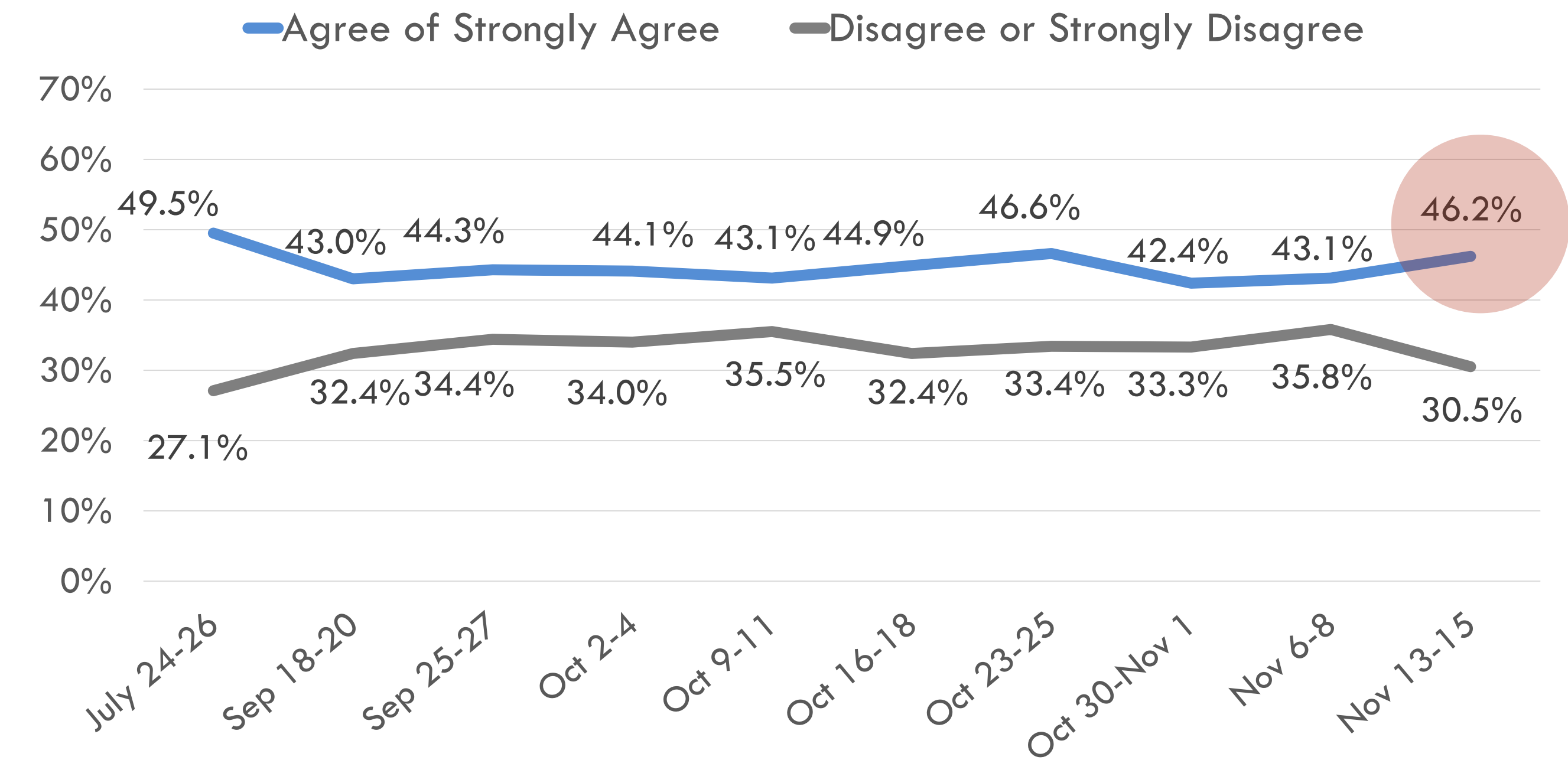
How much do you agree with the following statement?

Statement: I have lost my interest in/taste for traveling for the time being.



(Base: Waves 20, 28-36 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

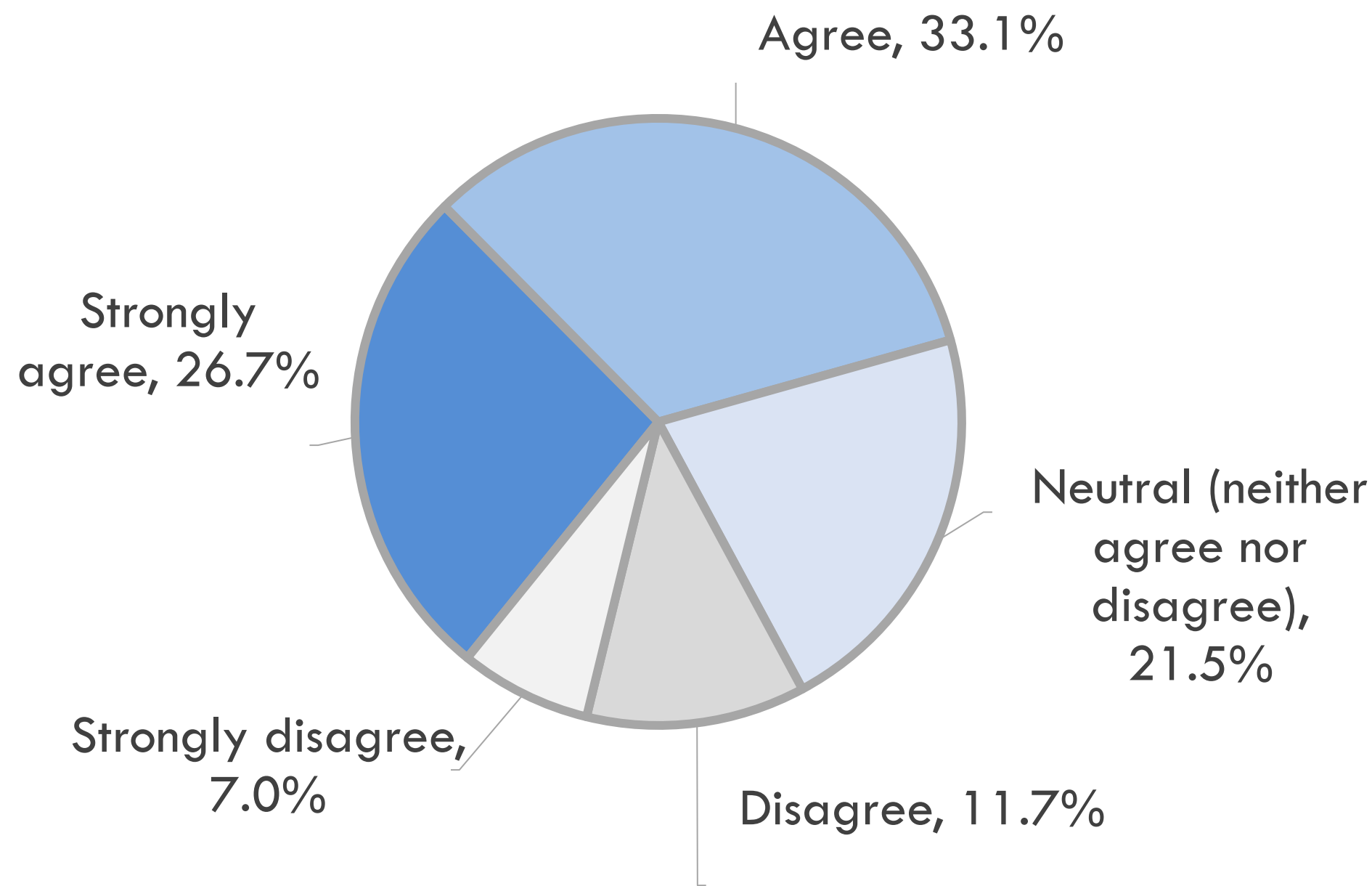
Historical data



INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

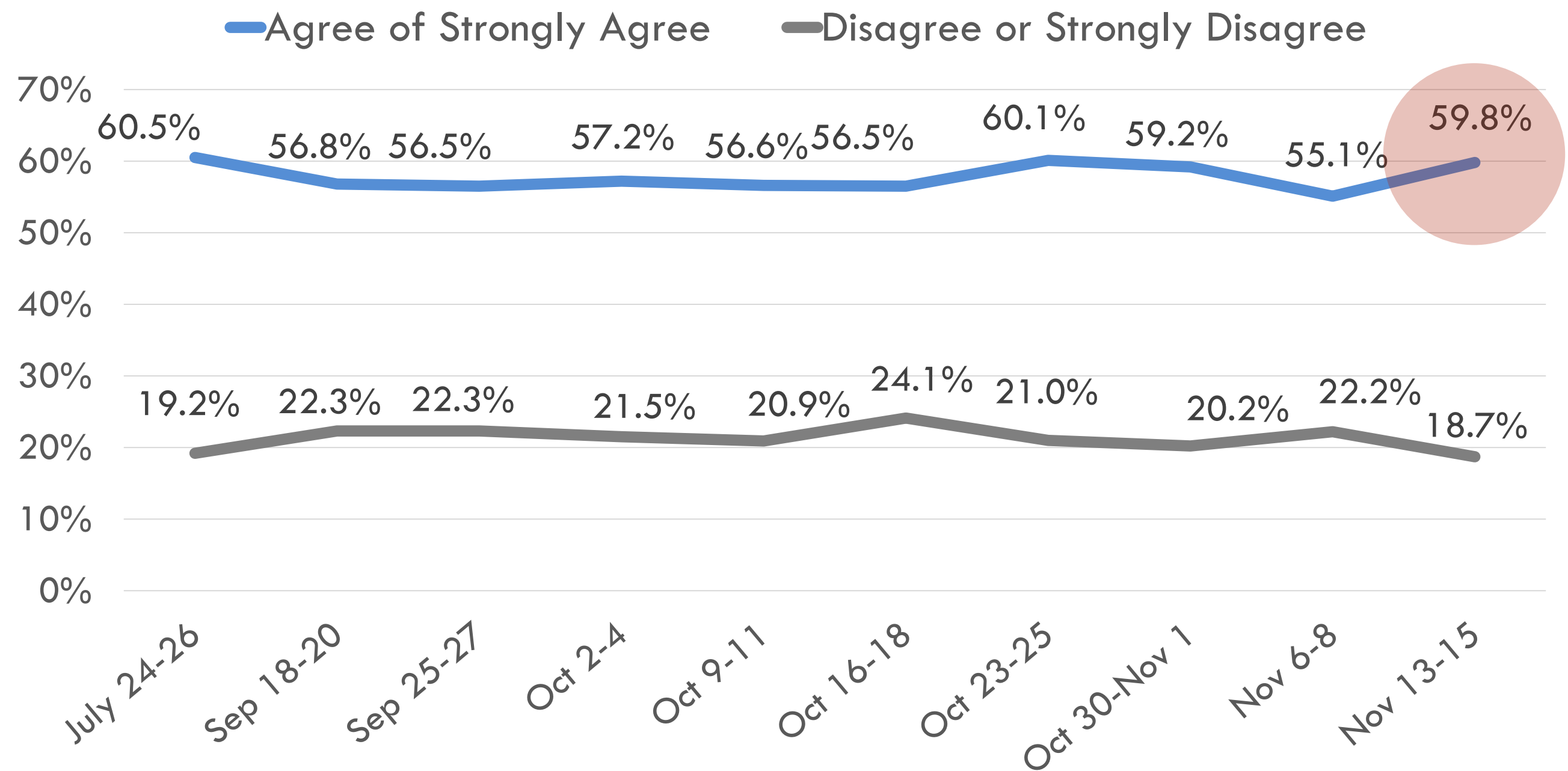
How much do you agree with the following statement?

Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.



(Base: Waves 20, 28-36 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

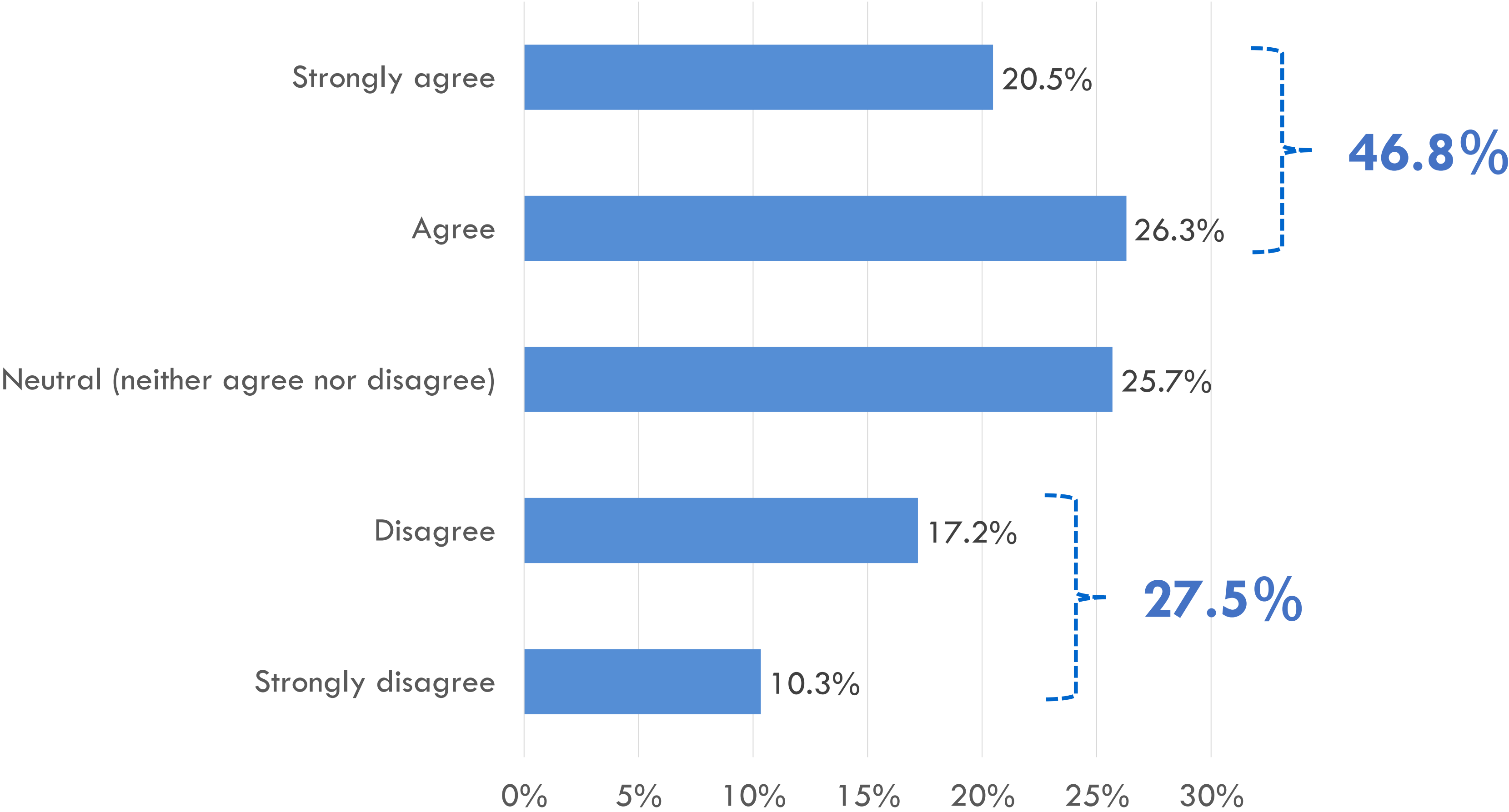
Historical data



TRAVEL GUILT

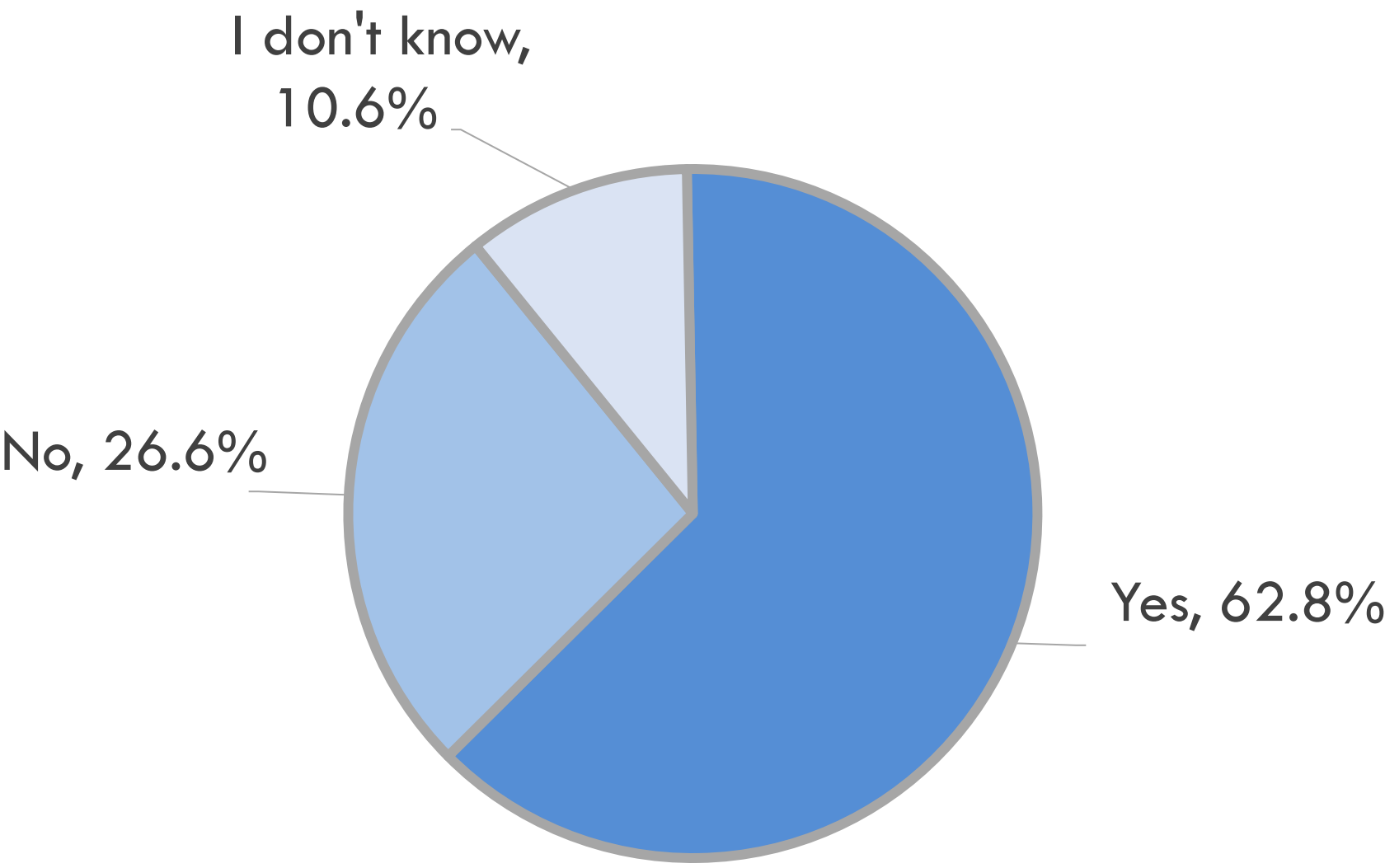
Question: I would feel guilty traveling right now.

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

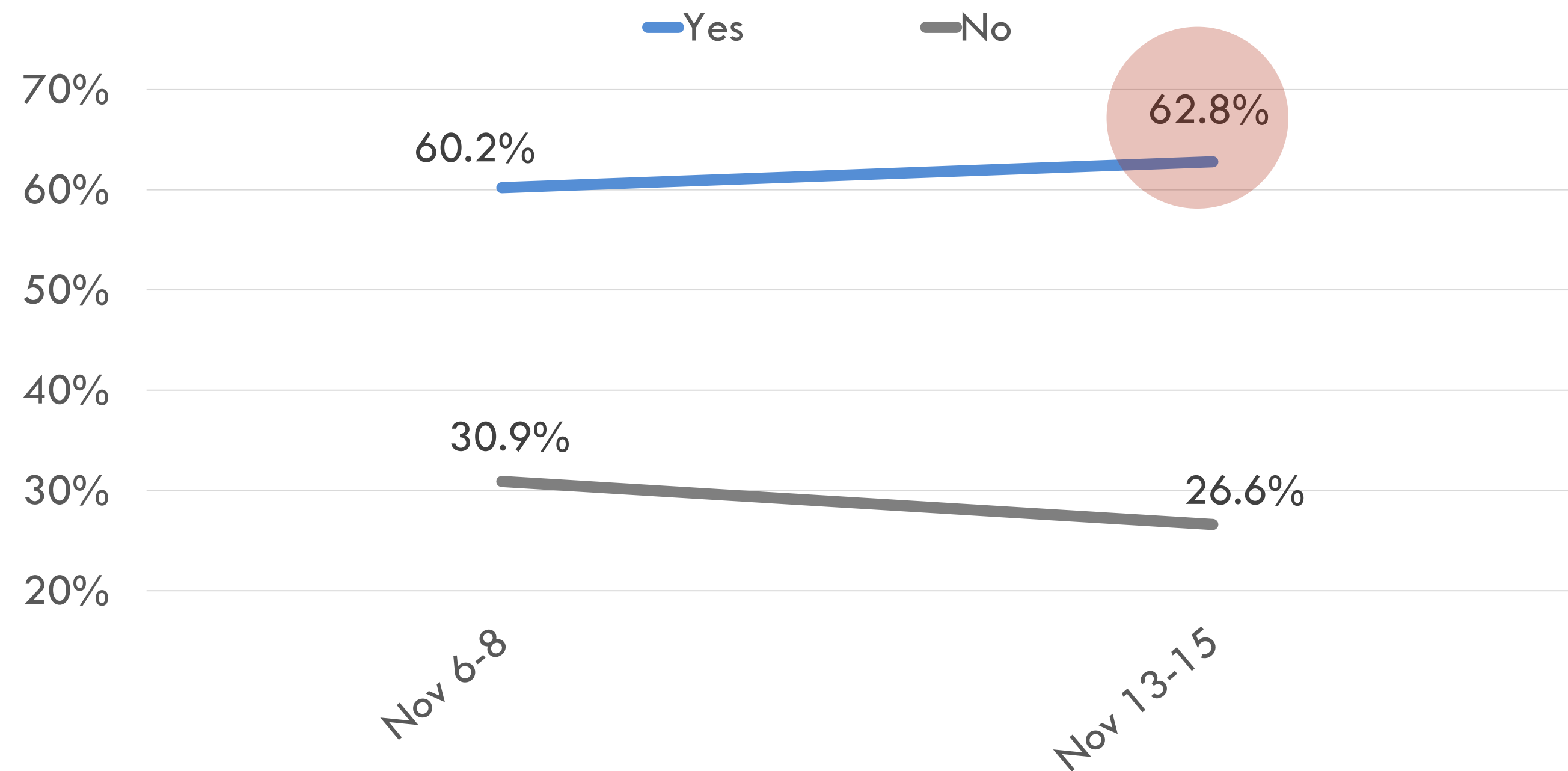


EFFECTS OF RECENT CORONAVIRUS SURGES

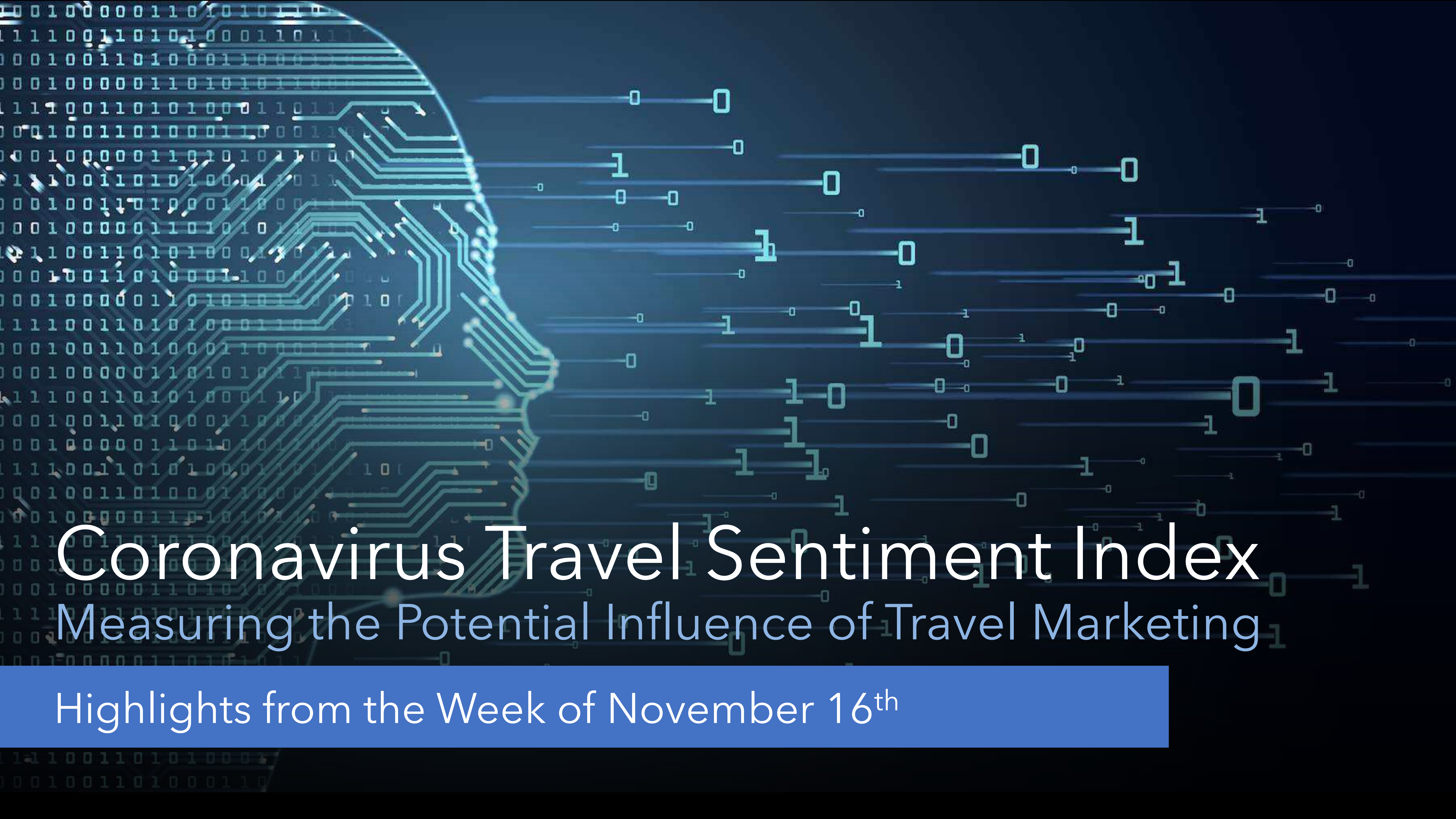
Question: Have recent increases in COVID-19 cases around the country made you LESS LIKELY to travel in the next THREE (3) MONTHS?



Historical data



(Base: Waves 35-36 data. All respondents, 1,200 and 1,200 completed surveys.)

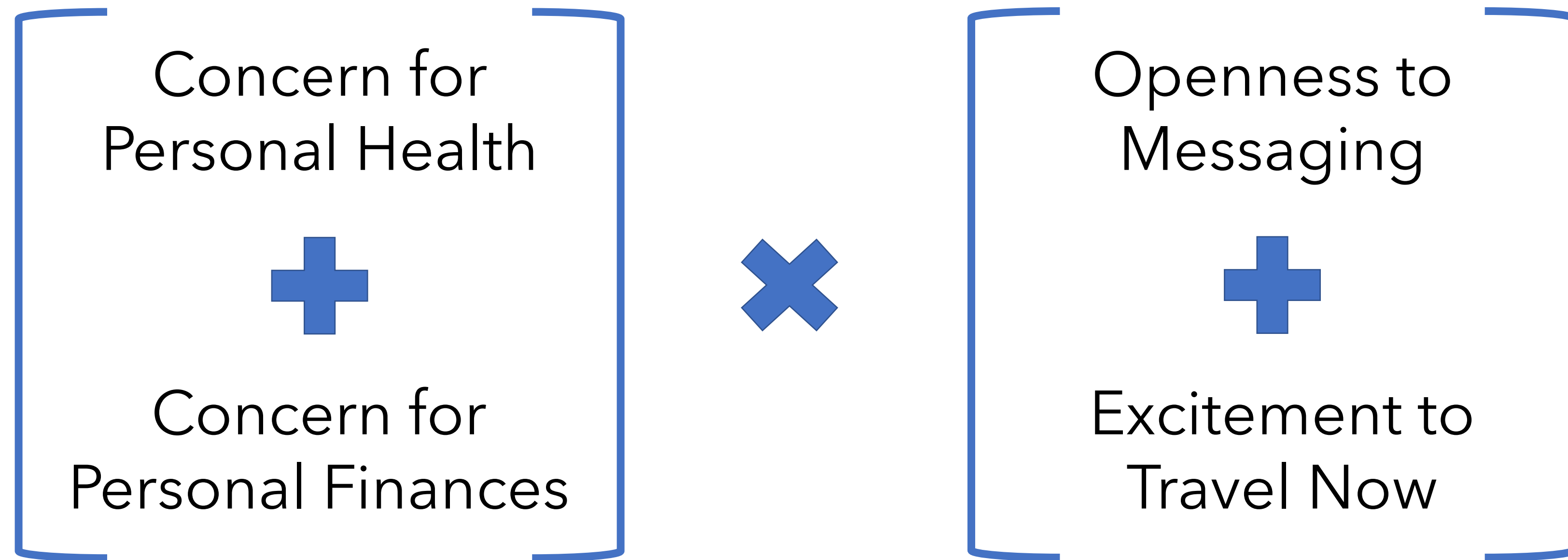


Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 16th

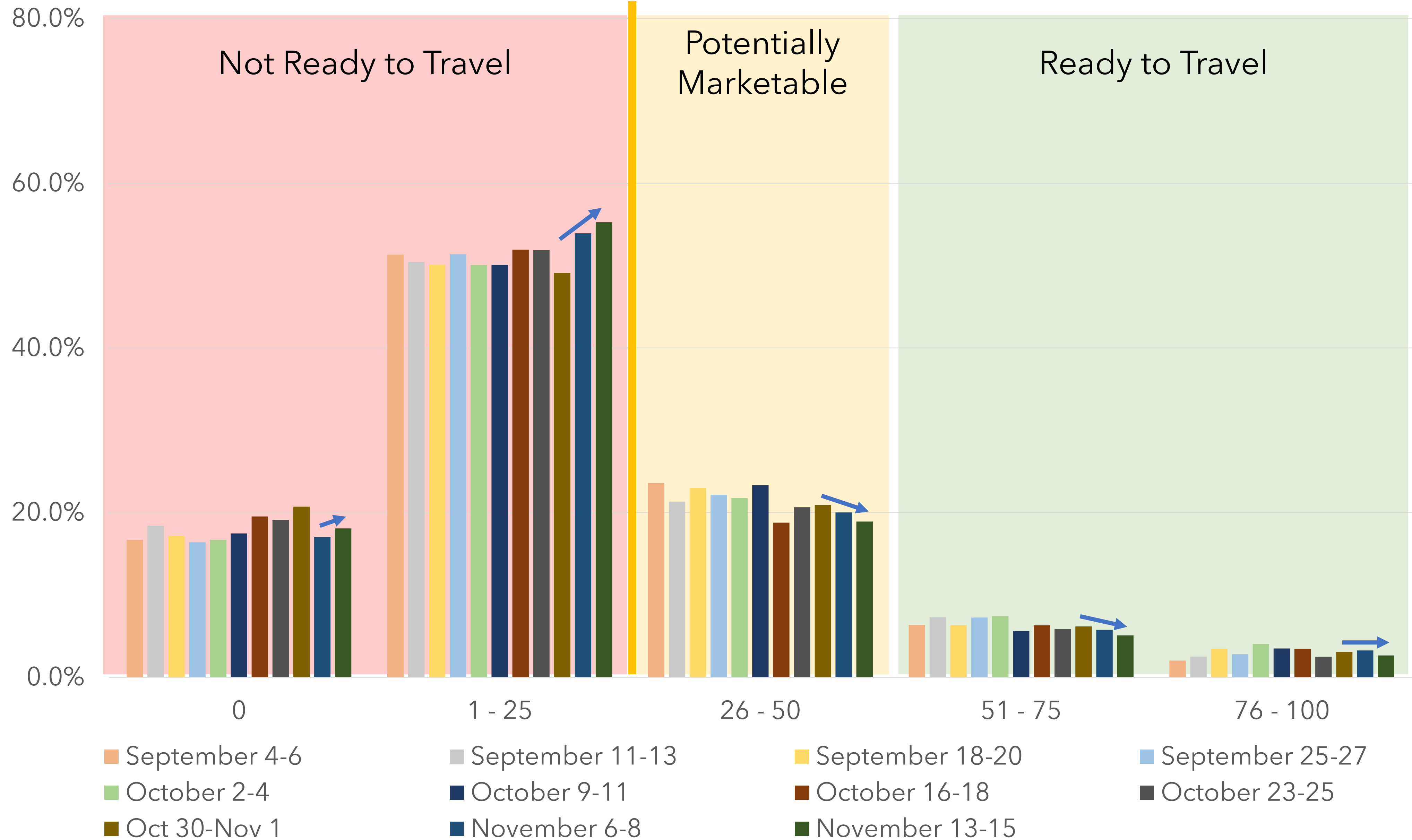
Predictive Index Formula

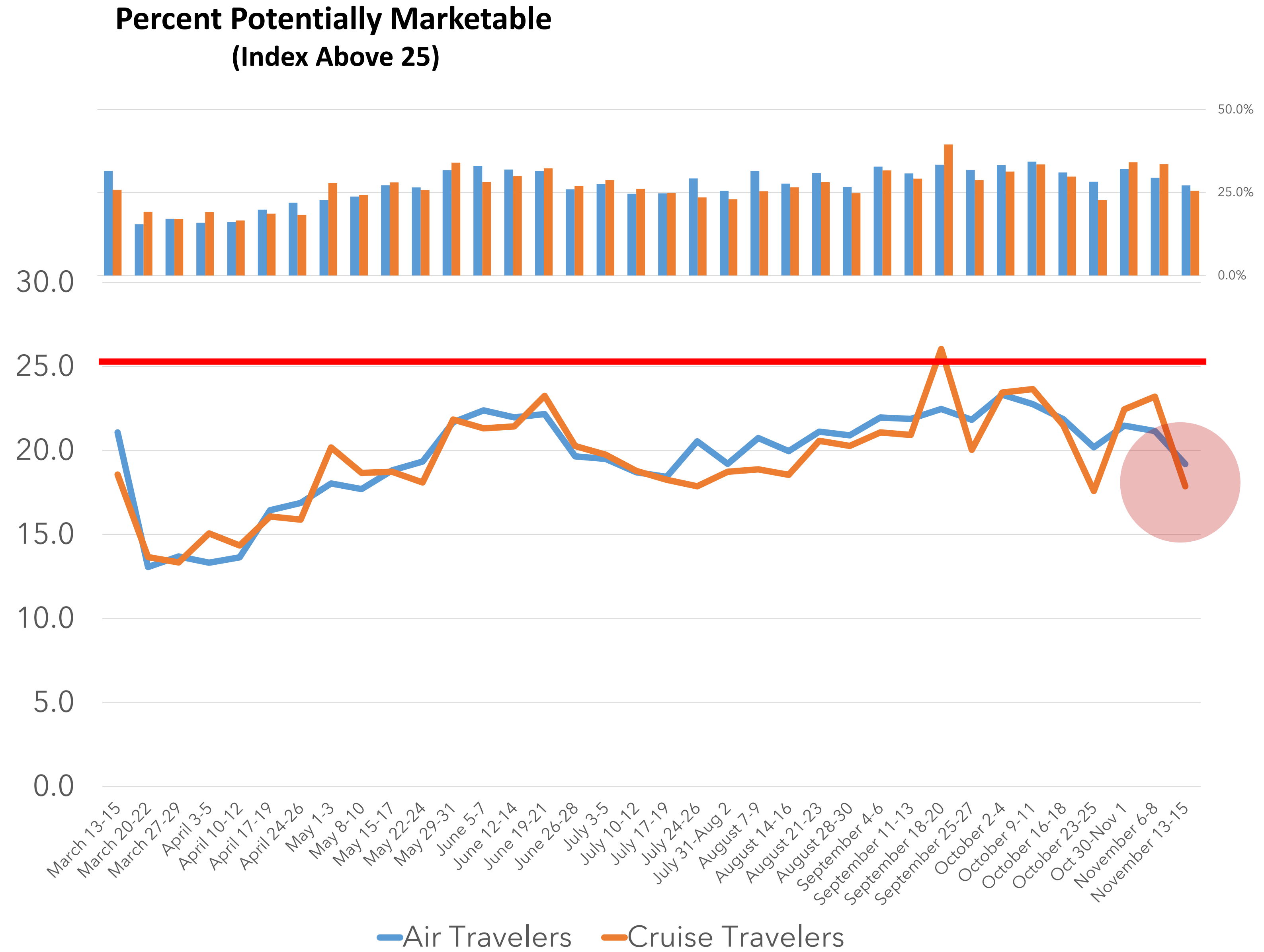
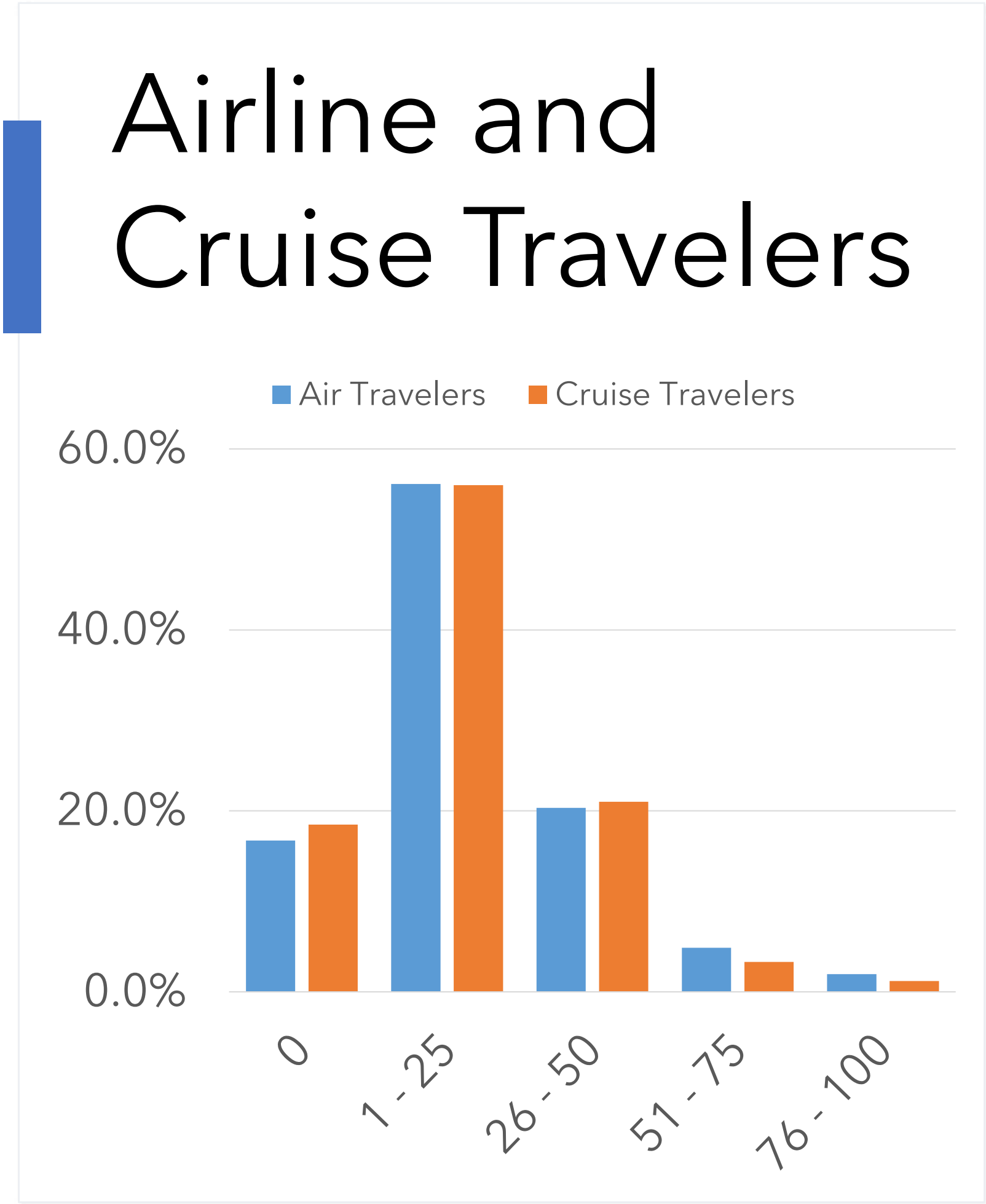


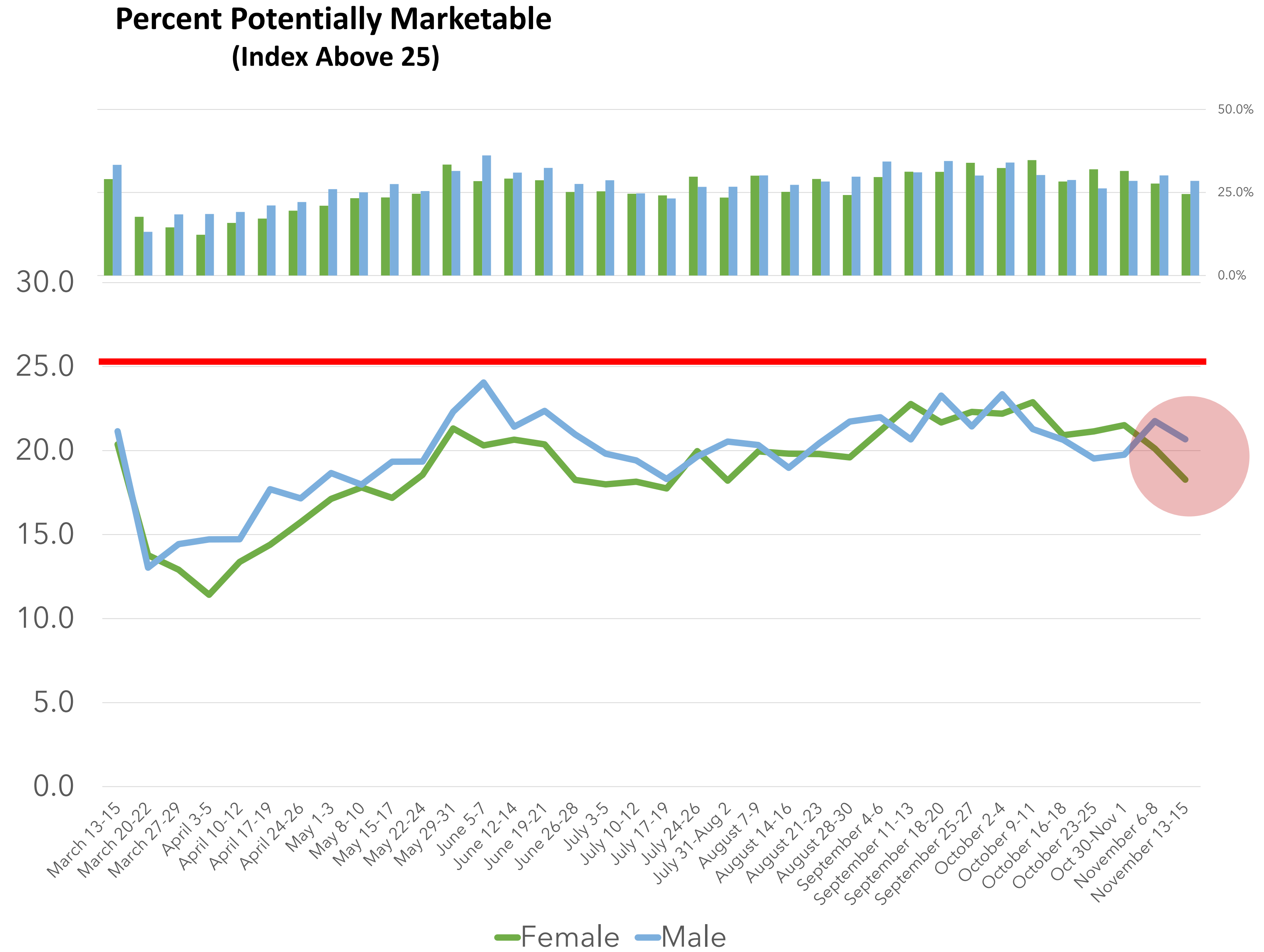
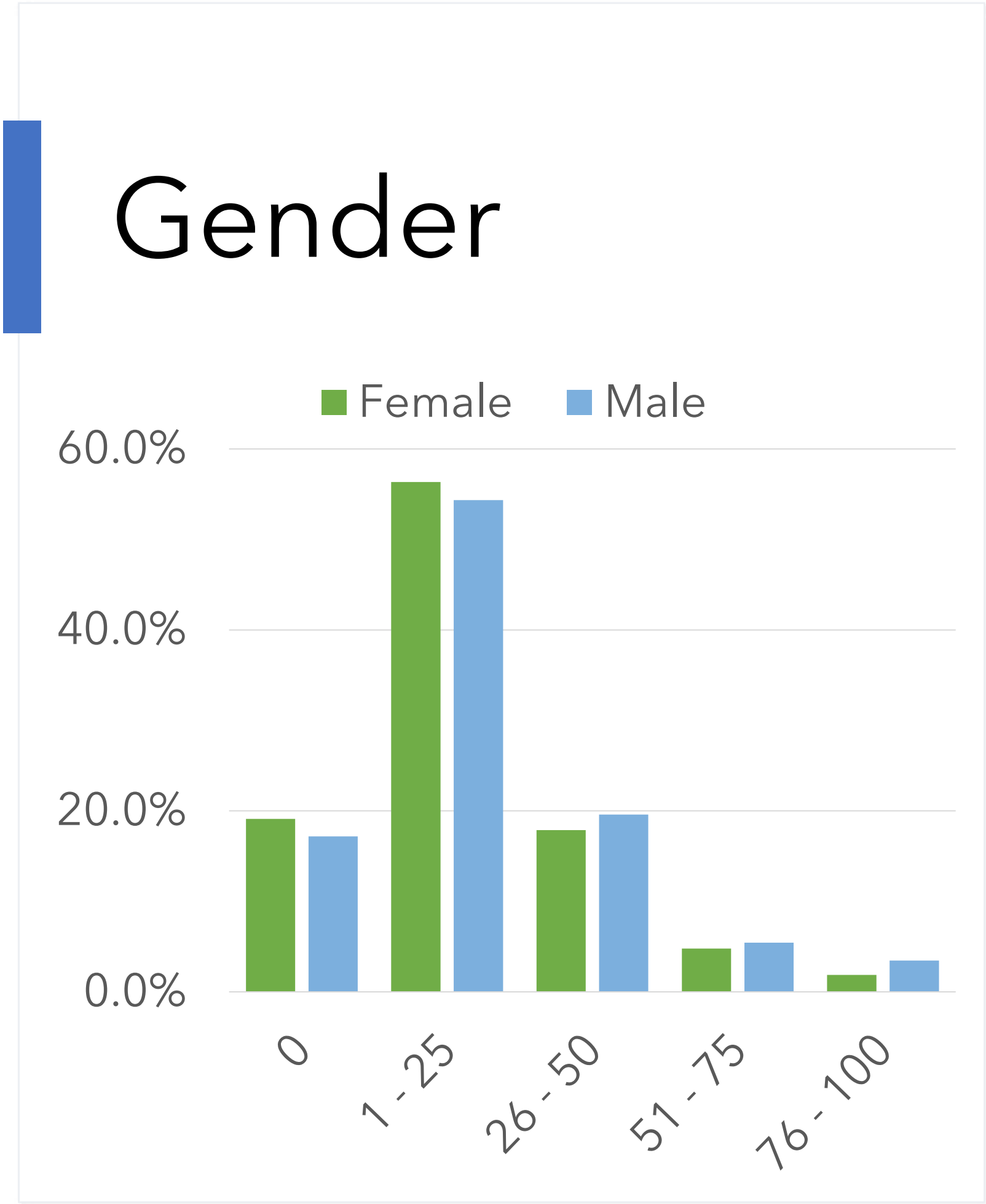
*Normalized to a 100pt scale

Travel Outlook

Neutral

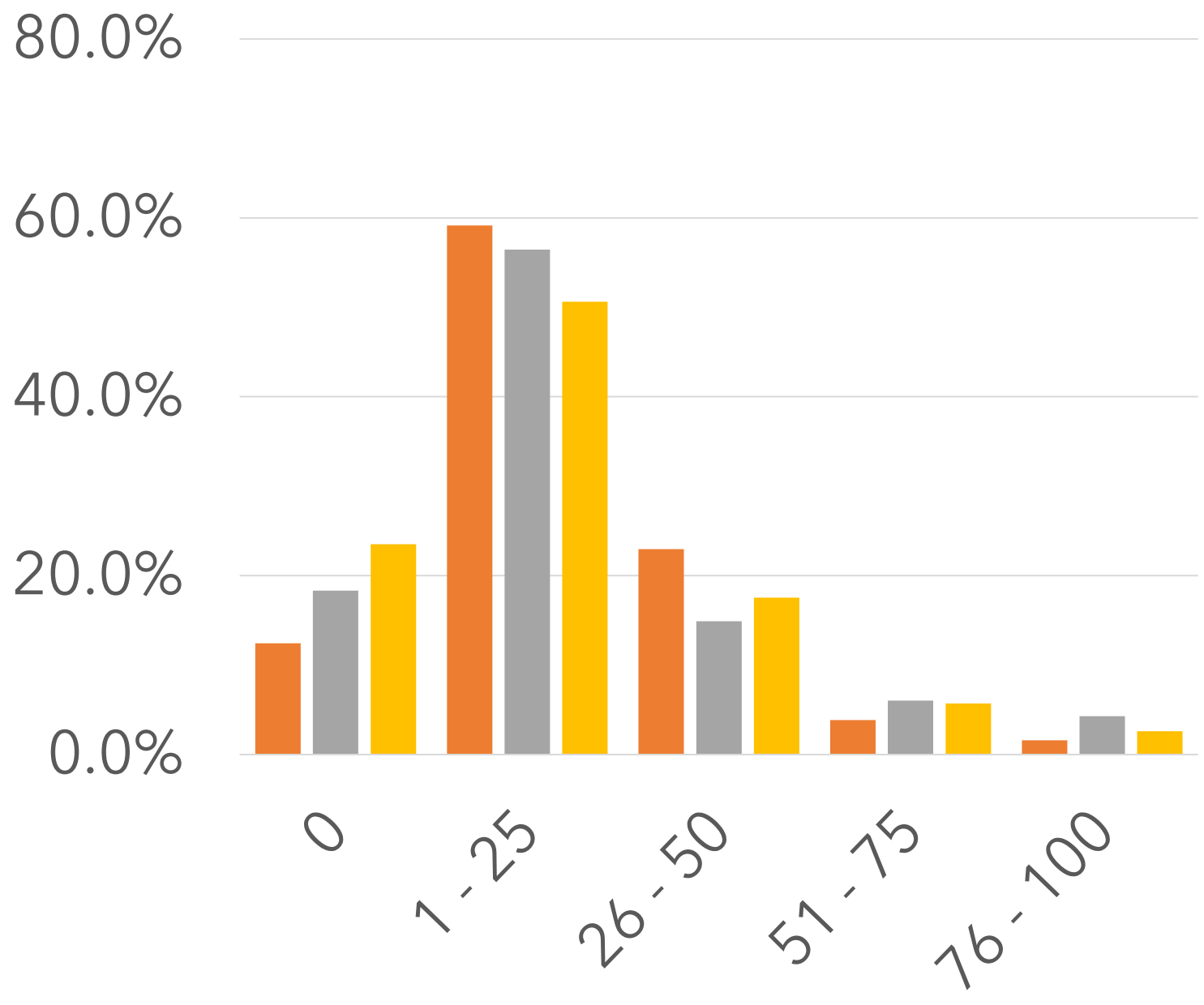




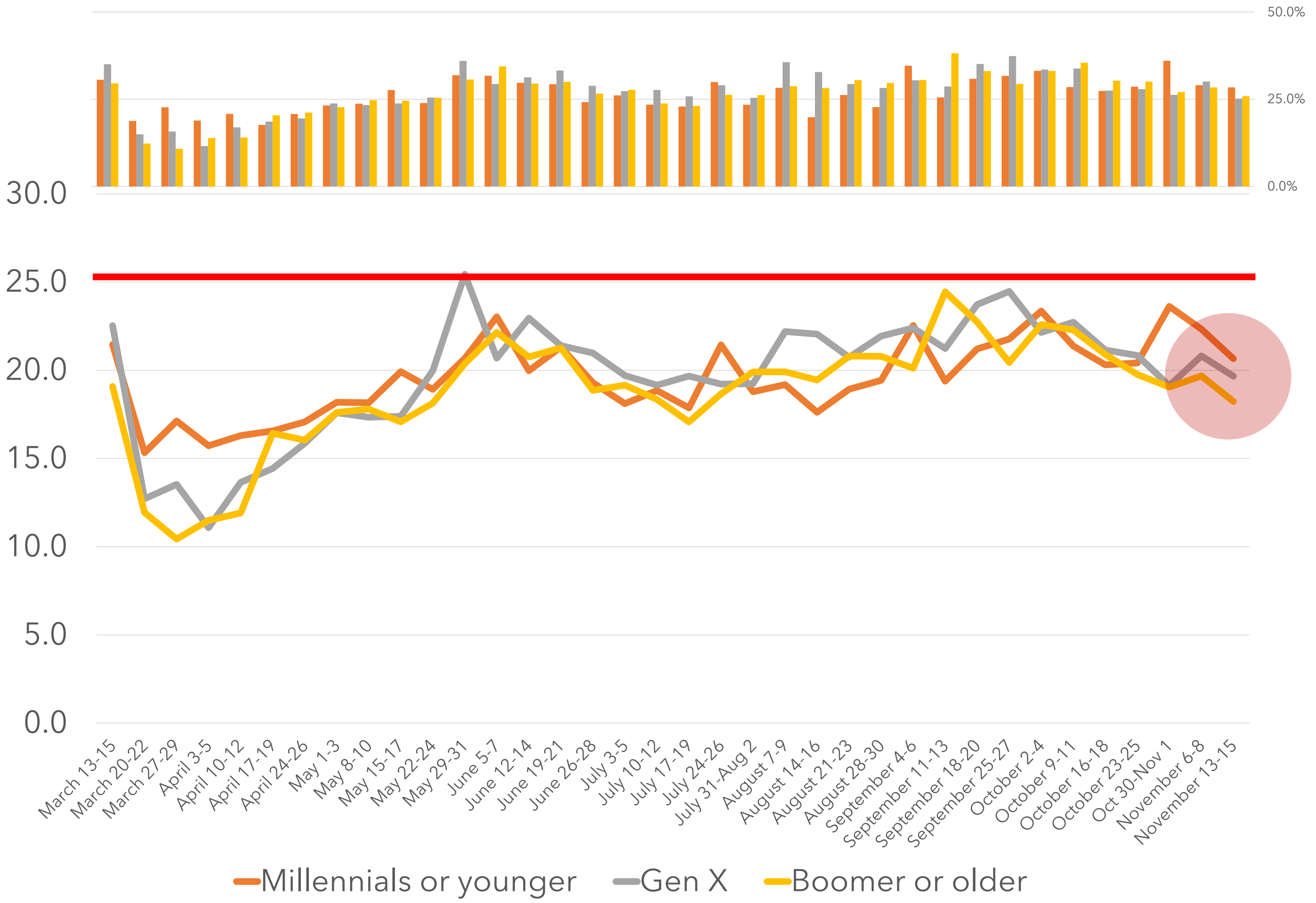


Generation

Millennials or younger Gen X Boomer or older

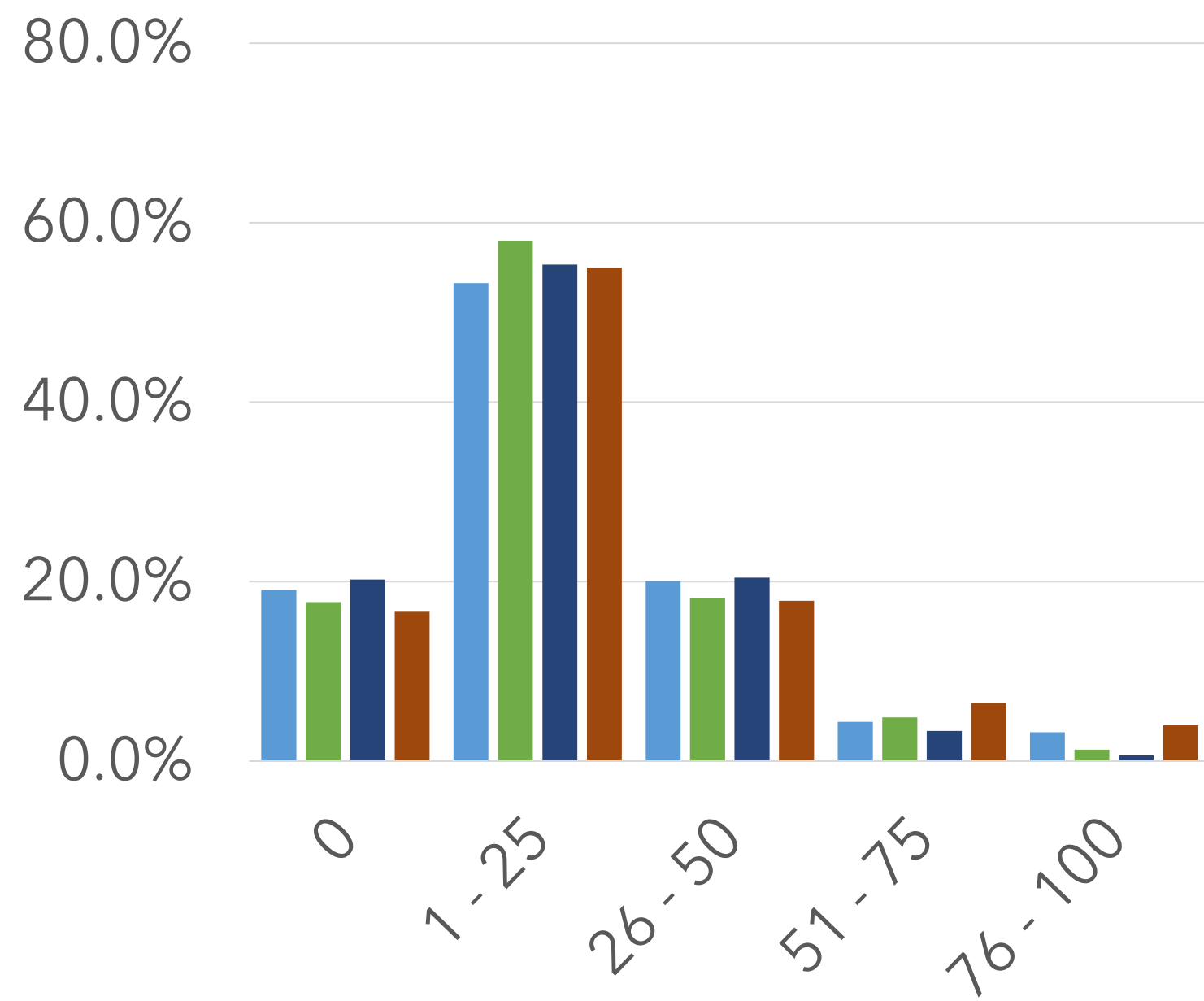


Percent Potentially Marketable (Index Above 25)

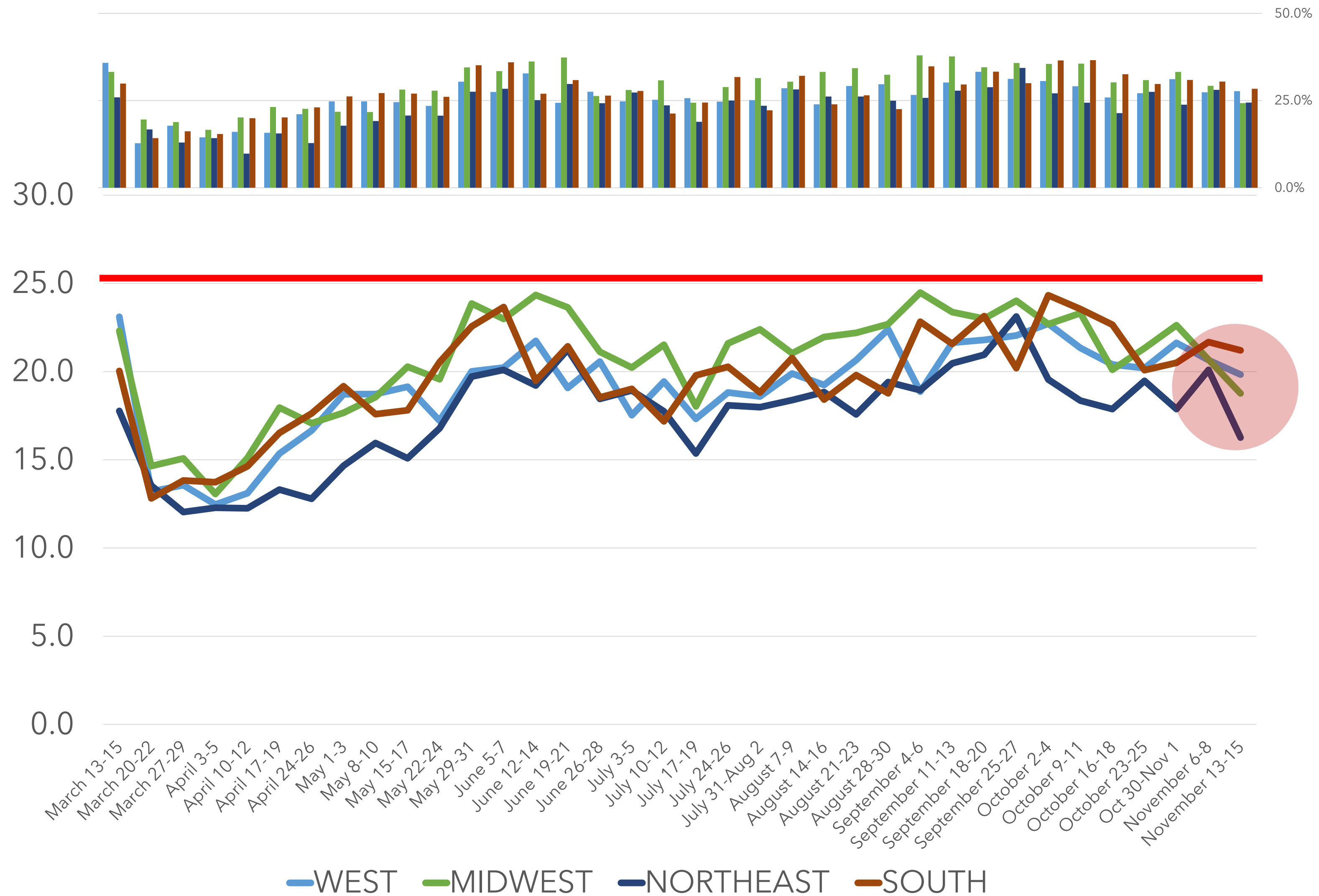


US Regions

WEST MIDWEST NORTHEAST SOUTH

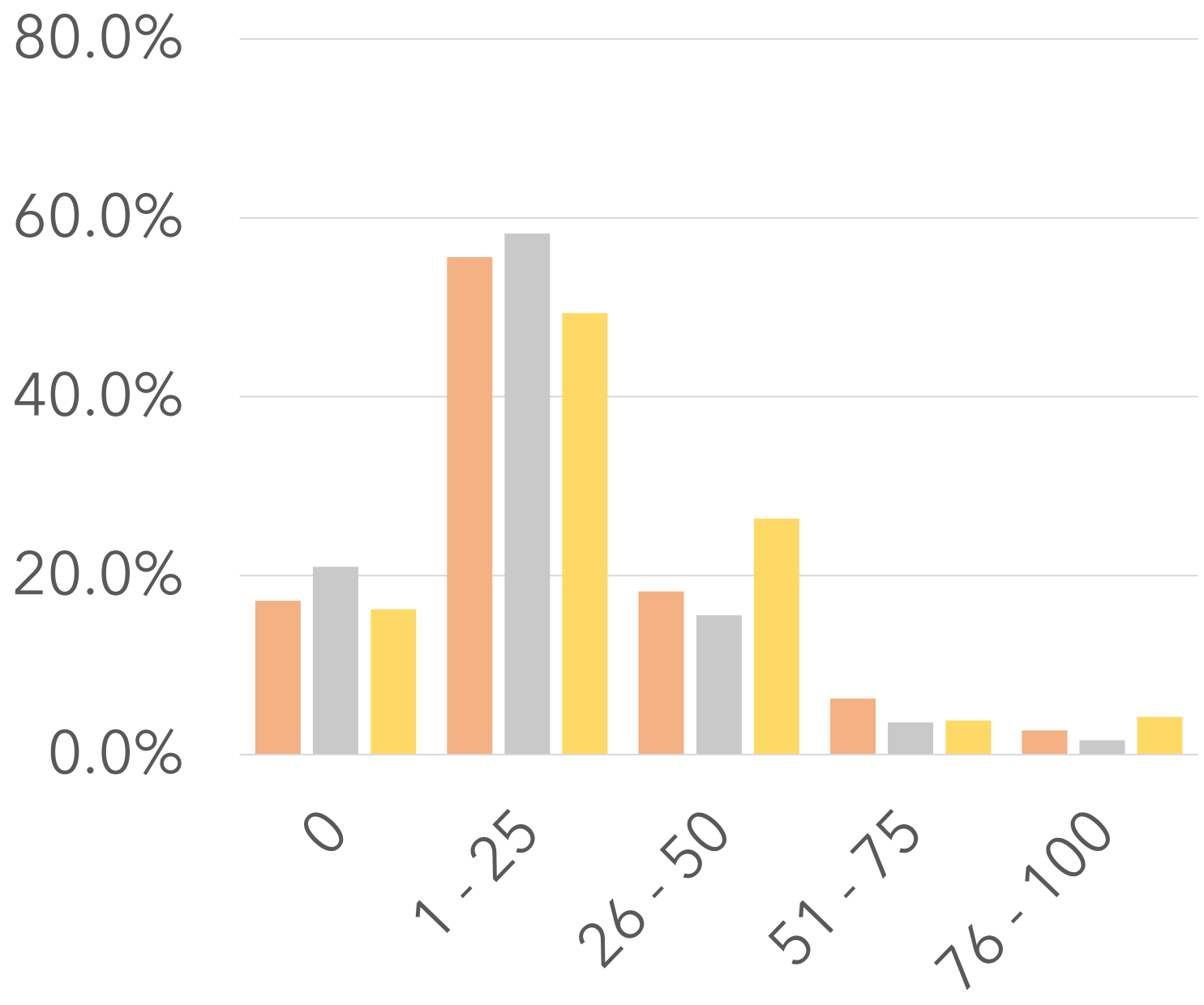


Percent Potentially Marketable (Index Above 25)

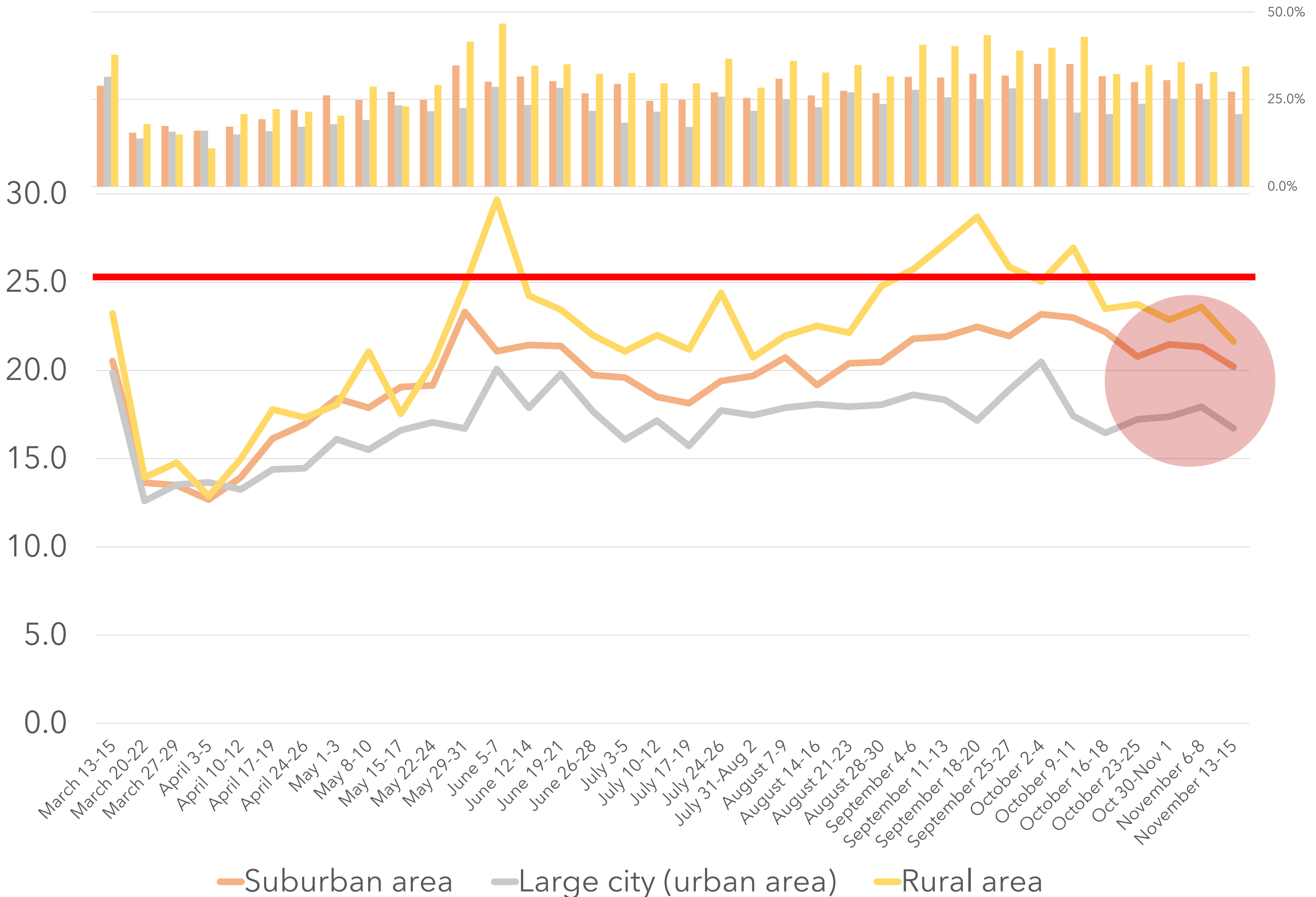


Residence Type

Suburban area Large city (urban area) Rural area



Percent Potentially Marketable (Index Above 25)



Lodging Preference

Luxury Hotel
Peer-to-peer lodging
Non-Luxury Hotel
Campground or RV park

60.0%

40.0%

20.0%

0.0%

0

1 - 25

26 - 50

51 - 75

76 - 100

Percent Potentially Marketable (Index Above 25)

35.0

30.0

25.0

20.0

15.0

10.0

5.0

0.0

75.0%

50.0%

25.0%

0.0%

March 13-15

March 20-22

March 27-29

April 3-5

April 10-12

April 17-19

April 24-26

May 1-3

May 8-10

May 15-17

May 22-24

May 29-31

June 5-7

June 12-14

June 19-21

June 26-28

July 3-5

July 10-12

July 17-19

July 24-26

July 31-Aug 2

August 7-9

August 14-16

August 21-23

August 28-30

September 4-6

September 11-13

September 18-20

October 2-4

October 9-11

October 16-18

October 23-25

Oct 30-Nov 1

November 6-8

November 13-15

Luxury Hotel

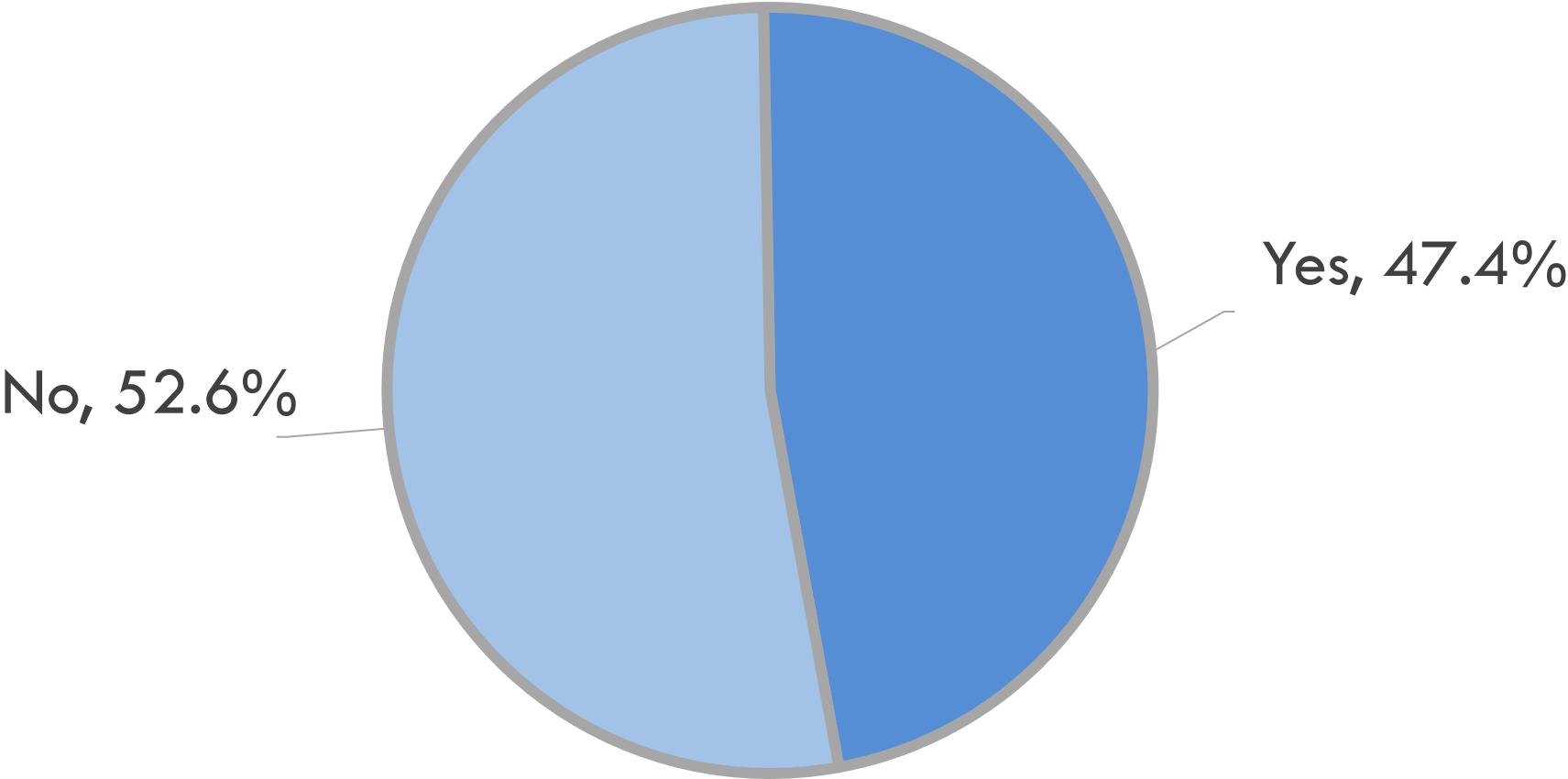
Peer-to-peer lodging

Non-Luxury Hotel

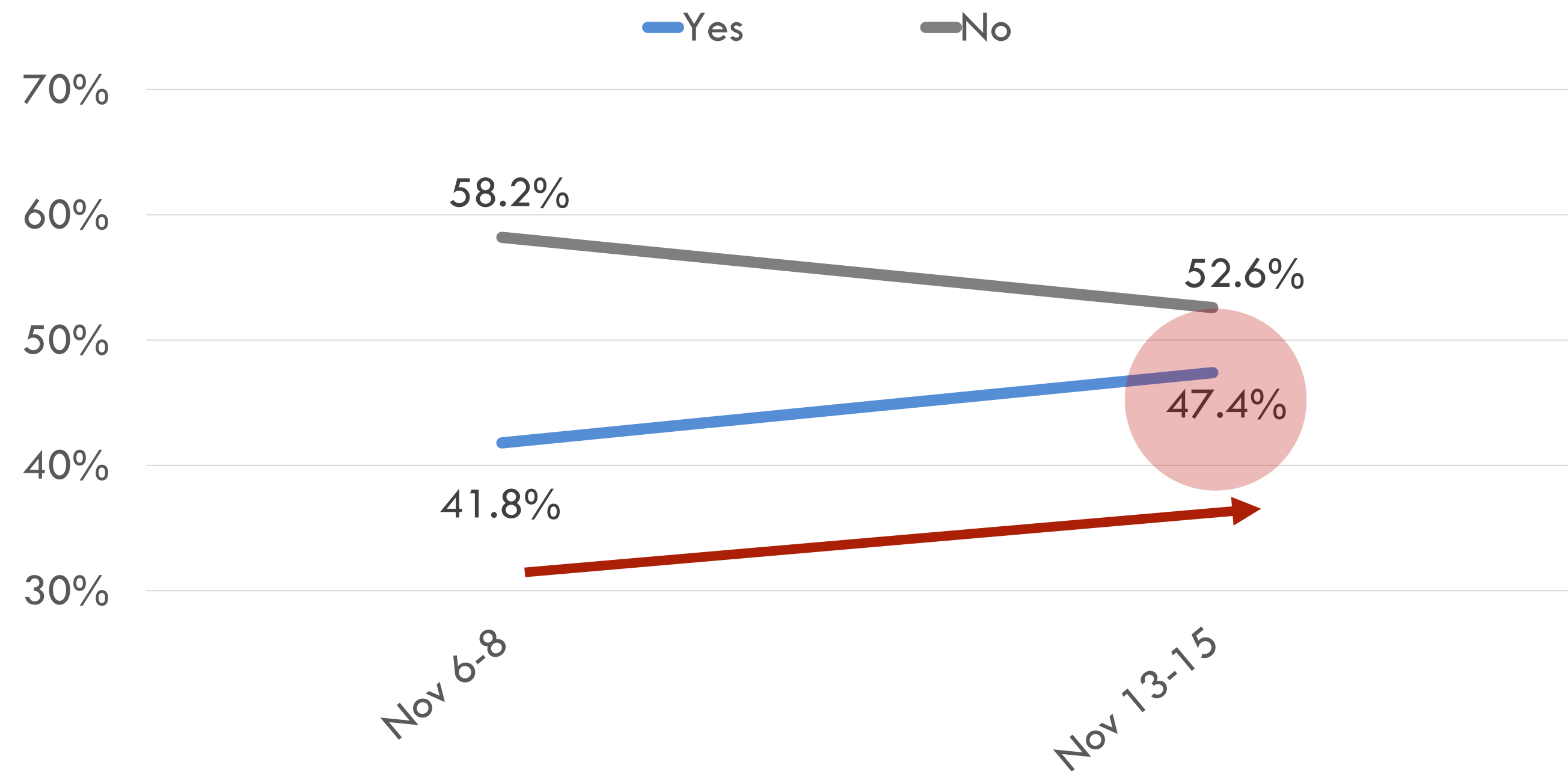
Campground or RV park

CHANGES TO TRAVEL PLANS DUE TO RECENT CORONAVIRUS SURGES

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



Historical data

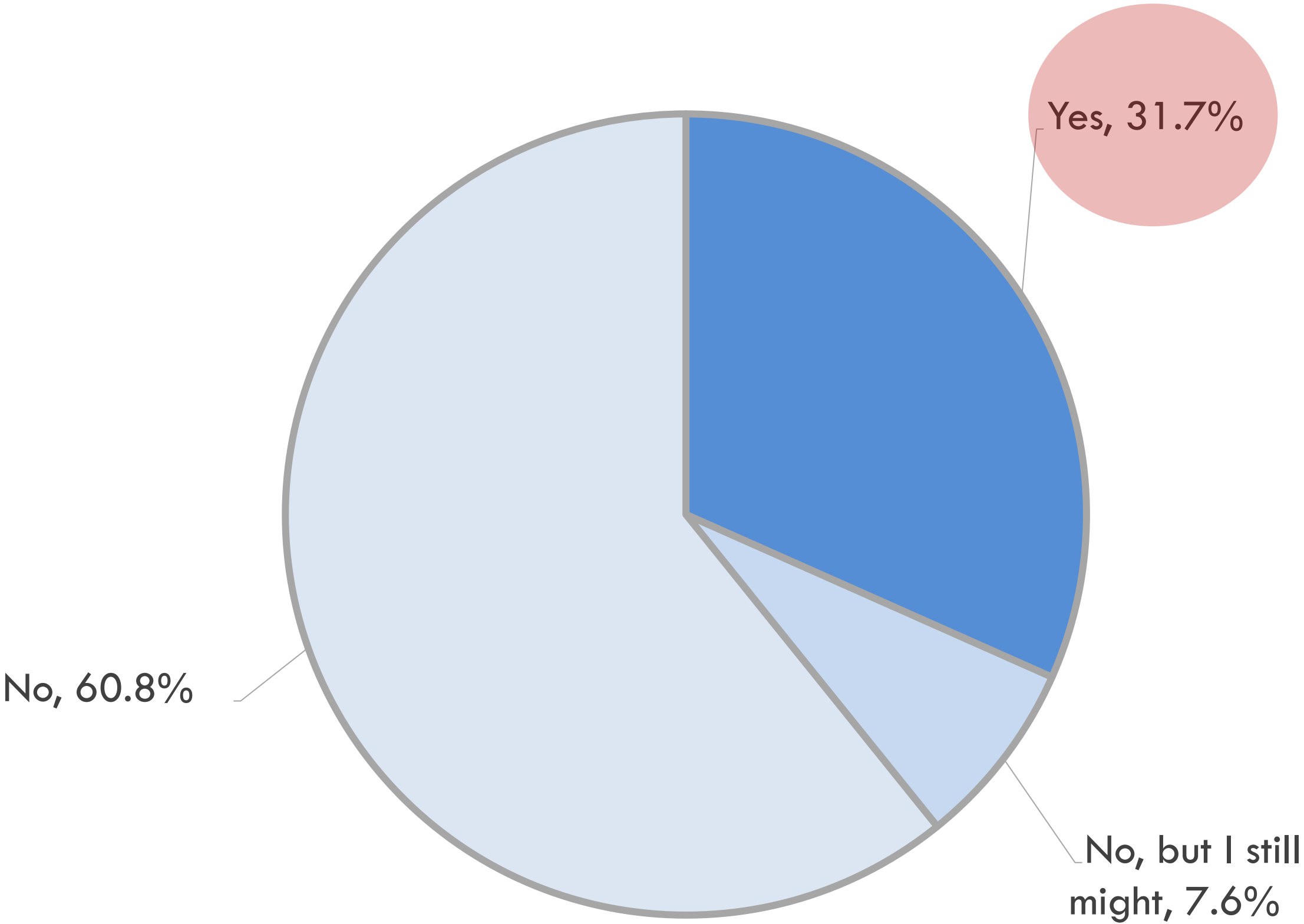


(Base: Waves 35-36 data. All respondents, 1,205 and 1,206 completed surveys.)

CANCELLATION OF THANKSGIVING DAY TRIP

Question: Due to the Coronavirus situation, have you cancelled a Thanksgiving Day trip this year that you were planning? (Select one)

(Base: Wave 36 data. Respondents who will not travel to celebrate Thanksgiving this year, 1,041 completed surveys. Data collected Nov 13-15, 2020)



KEY TAKEAWAYS

- American travelers are largely feeling that the pandemic situation isn't going to improve in the next month
- American travelers are increasingly concerned about contracting the virus
- The trajectory of the pandemic and the anxiety it is causing continues to depress how Americans feel about travel for the near-term, with excitement and openness down but guilt and discomfort up
- The decline in travel marketability spans across traveler segments
- The recent surge has resulted in nearly half of American travelers cancelling or postponing a trip and nearly one-third cancelling a Thanksgiving Day trip they were planning



HOLIDAY TRAVEL

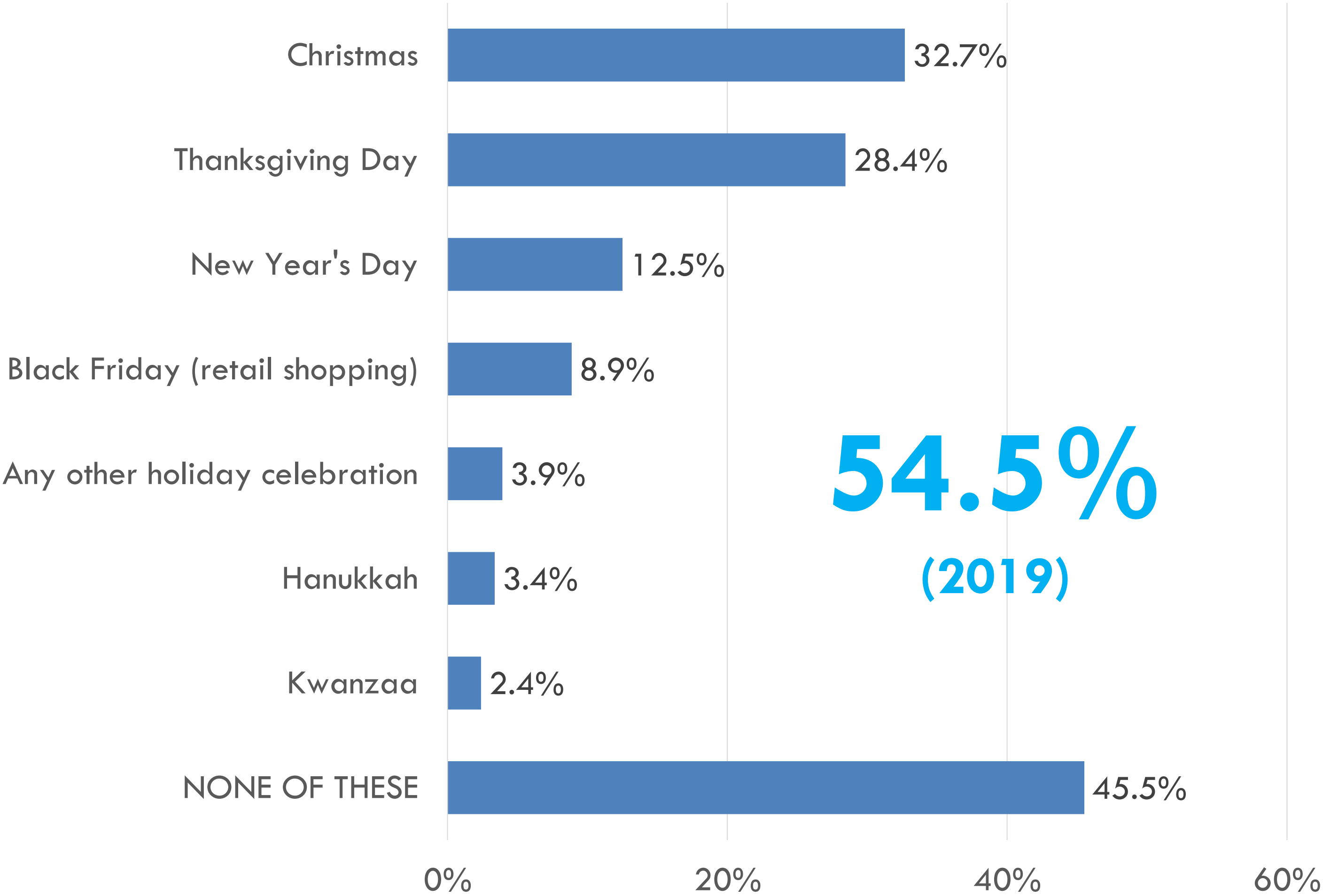


TRAVEL DURING THE HOLIDAYS: LAST YEAR

Question: Tell us about your holiday season travel LAST YEAR (the 2019 Holiday season).

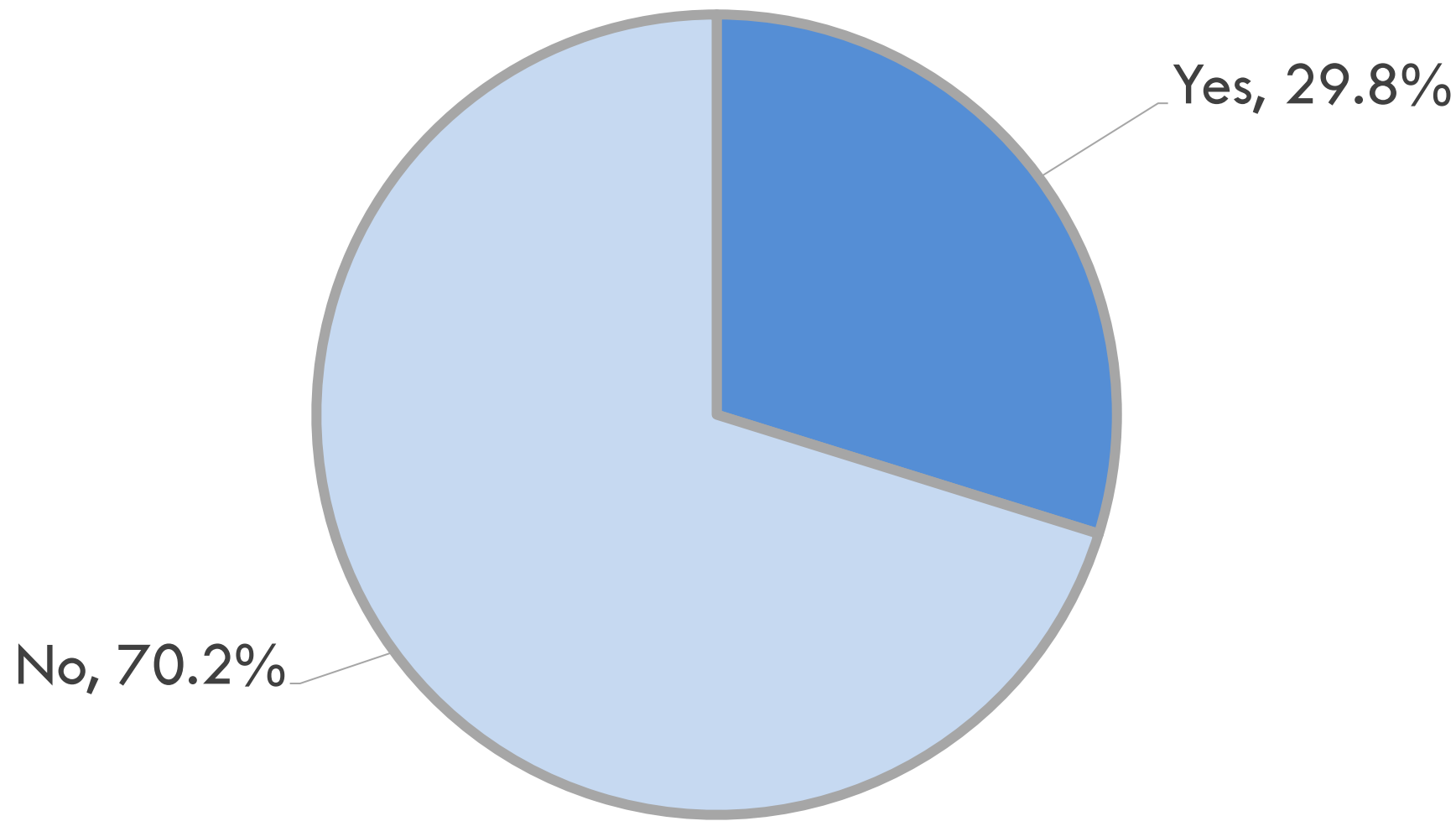
Did you travel (50 miles or more from your home) to celebrate/participate in any of the following LAST YEAR?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

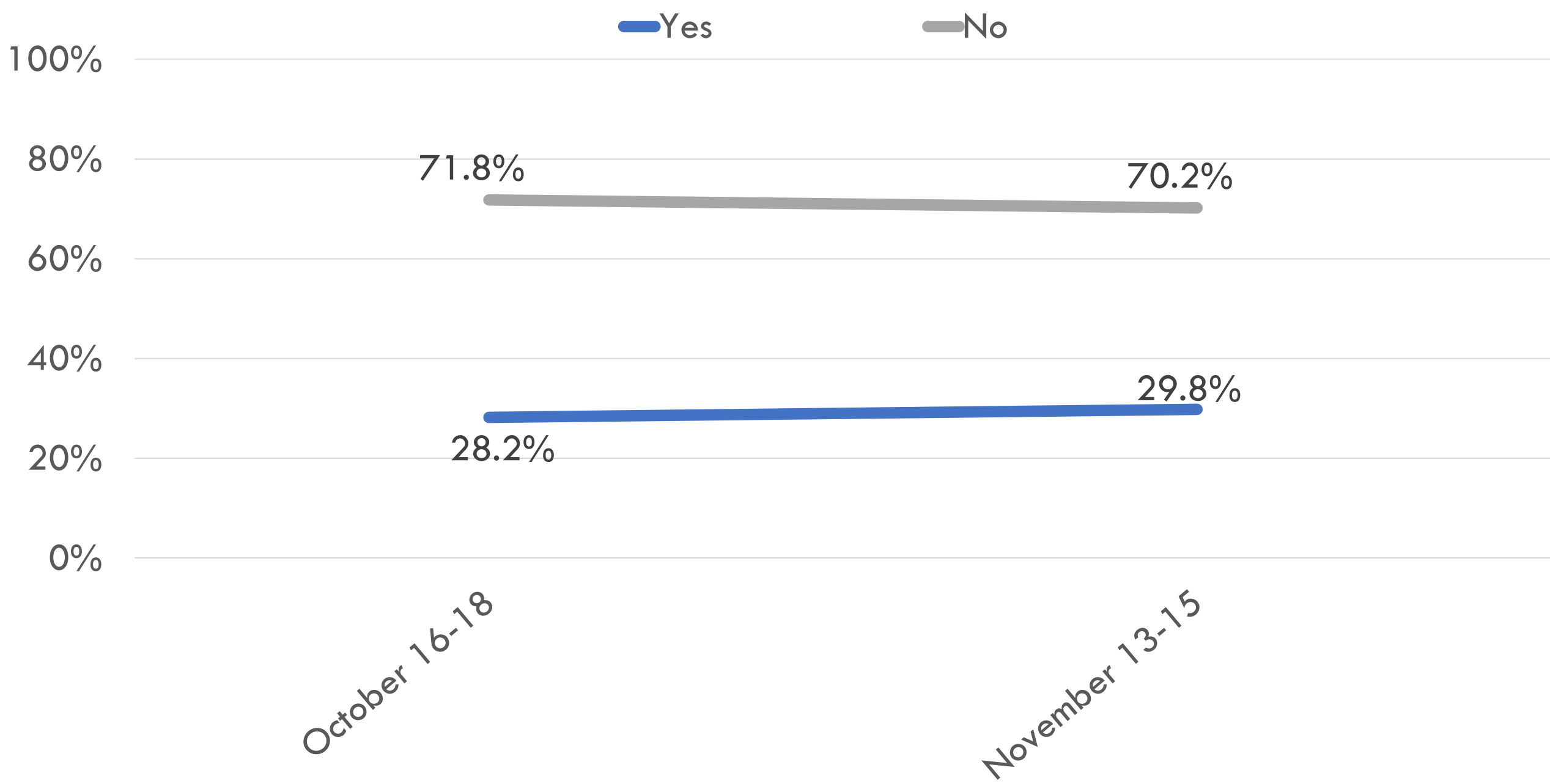


TRAVEL PLANS IN THE HOLIDAY SEASON: THIS YEAR

Question: Do you have any travel plans (even if tentative) for the holiday season this year?



Historical data

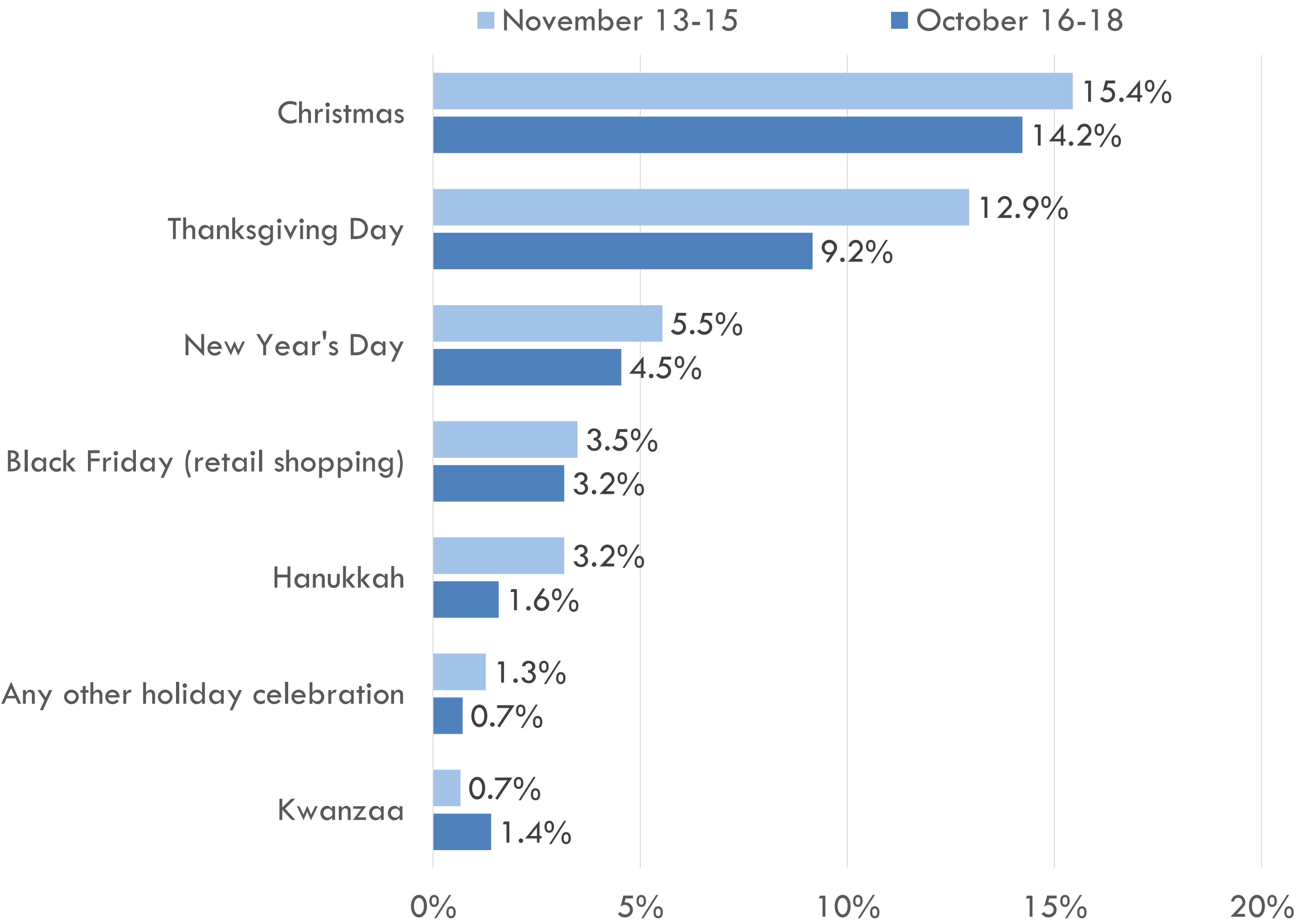


(Base: Wave 32 and 36 data. All respondents, 1,204 and 1,206 completed surveys. Data collected Oct 16-18 and Nov 13-15, 2020)

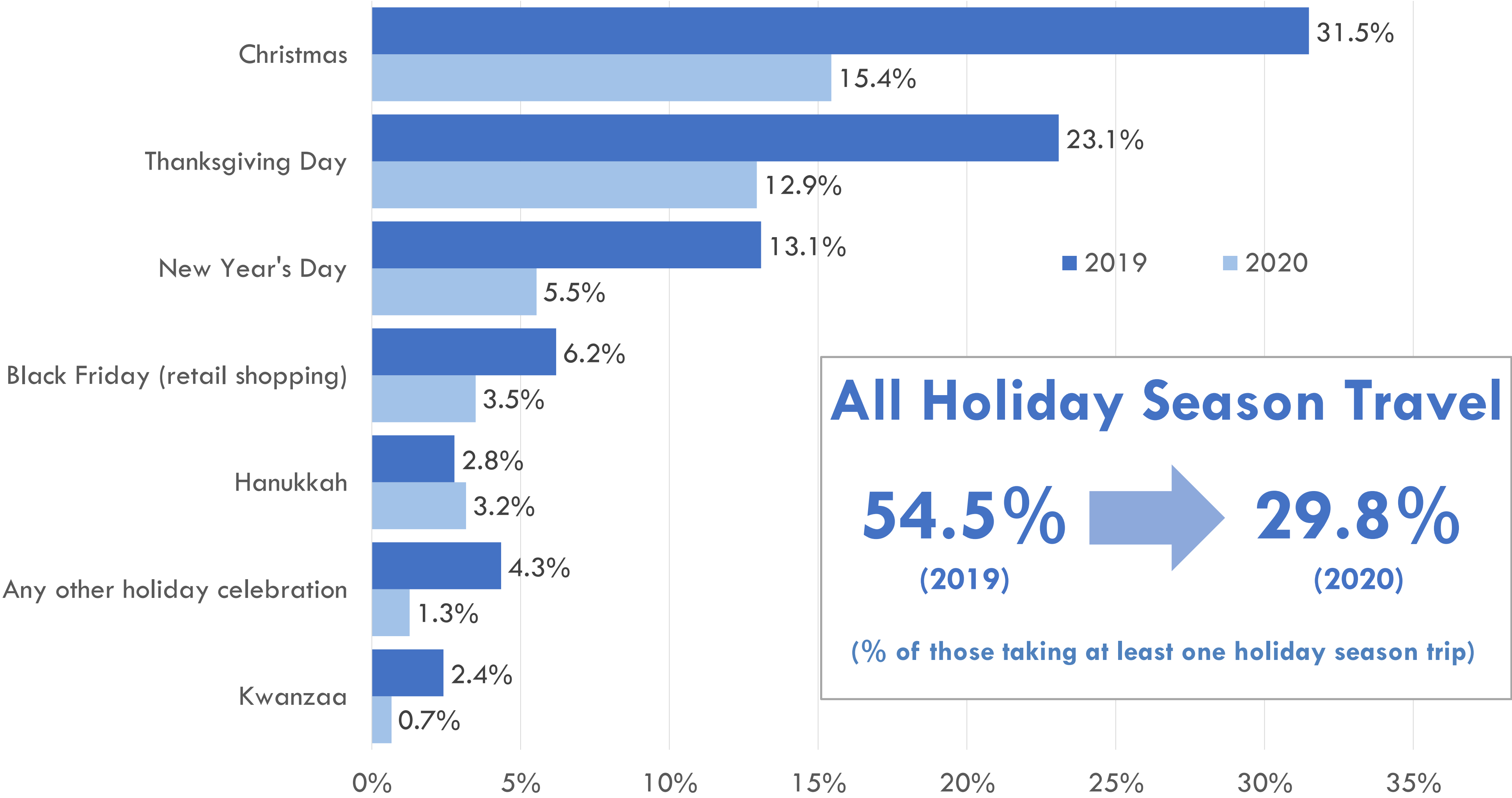
SPECIFIC HOLIDAY TRAVEL THIS YEAR

Question: Will you travel (50 miles or more from your home) to celebrate/participate in any of the following this year?

(Base: Wave 32 and 36 data. Those who have tentative holiday travel plans, 293 and 321 completed surveys. Data collected Oct 16-18 and Nov 13-15, 2020)

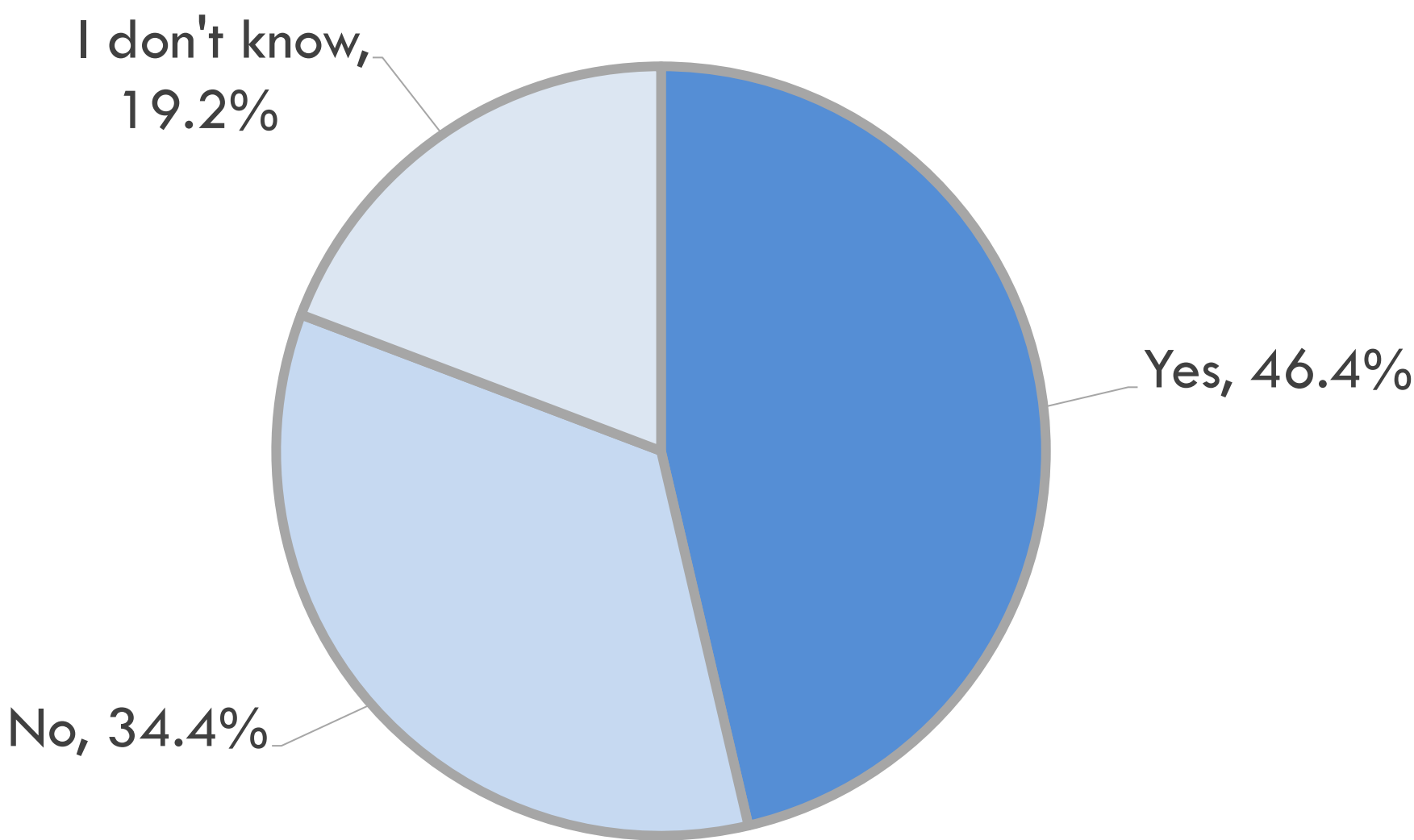


SPECIFIC HOLIDAY TRAVEL: 2019 VS. 2020

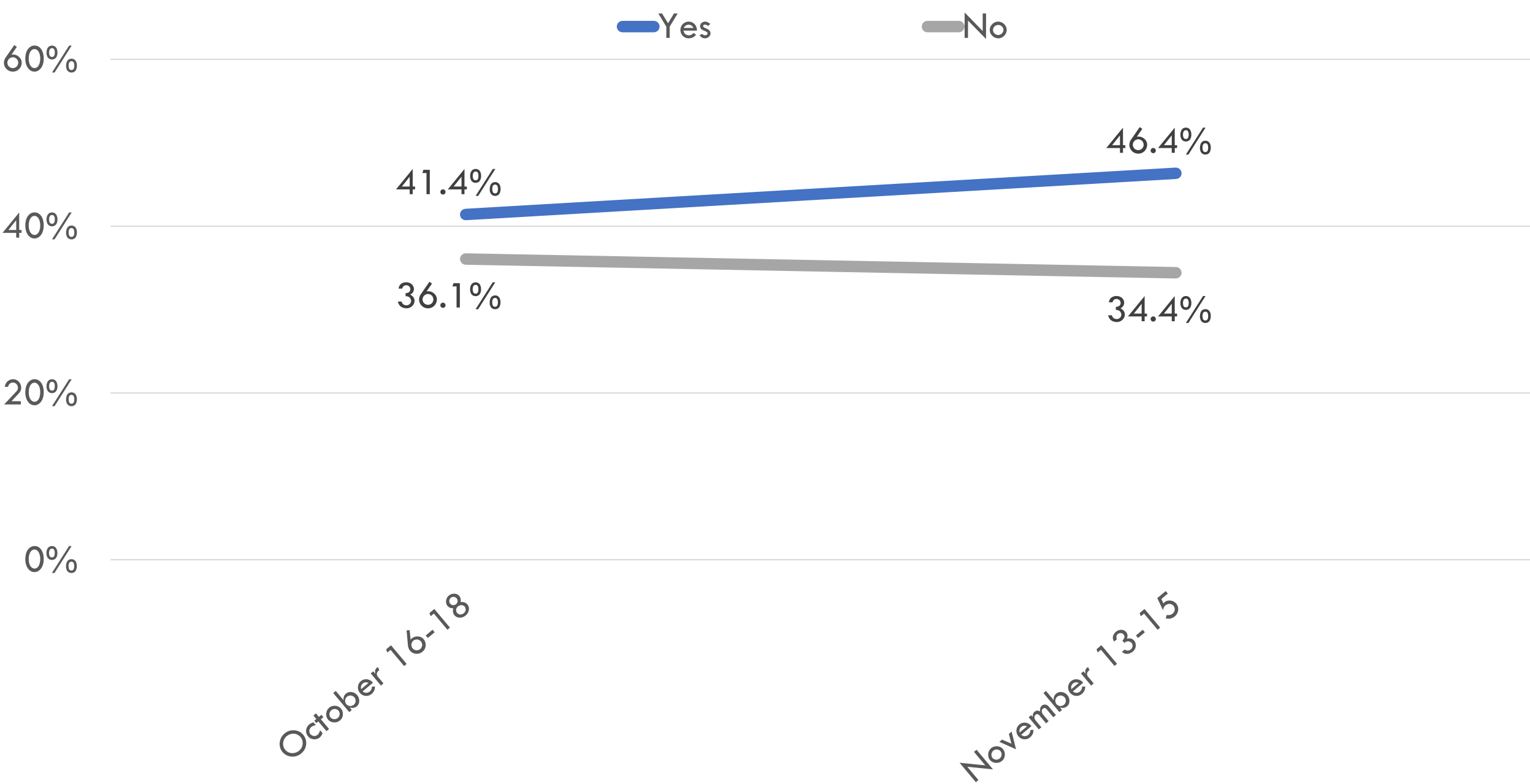


FRIENDS/RELATIVES NOT TRAVELING DURING THE HOLIDAYS

Question: Do you have any friends or family members who would normally travel during the holidays, but will not this



Historical data

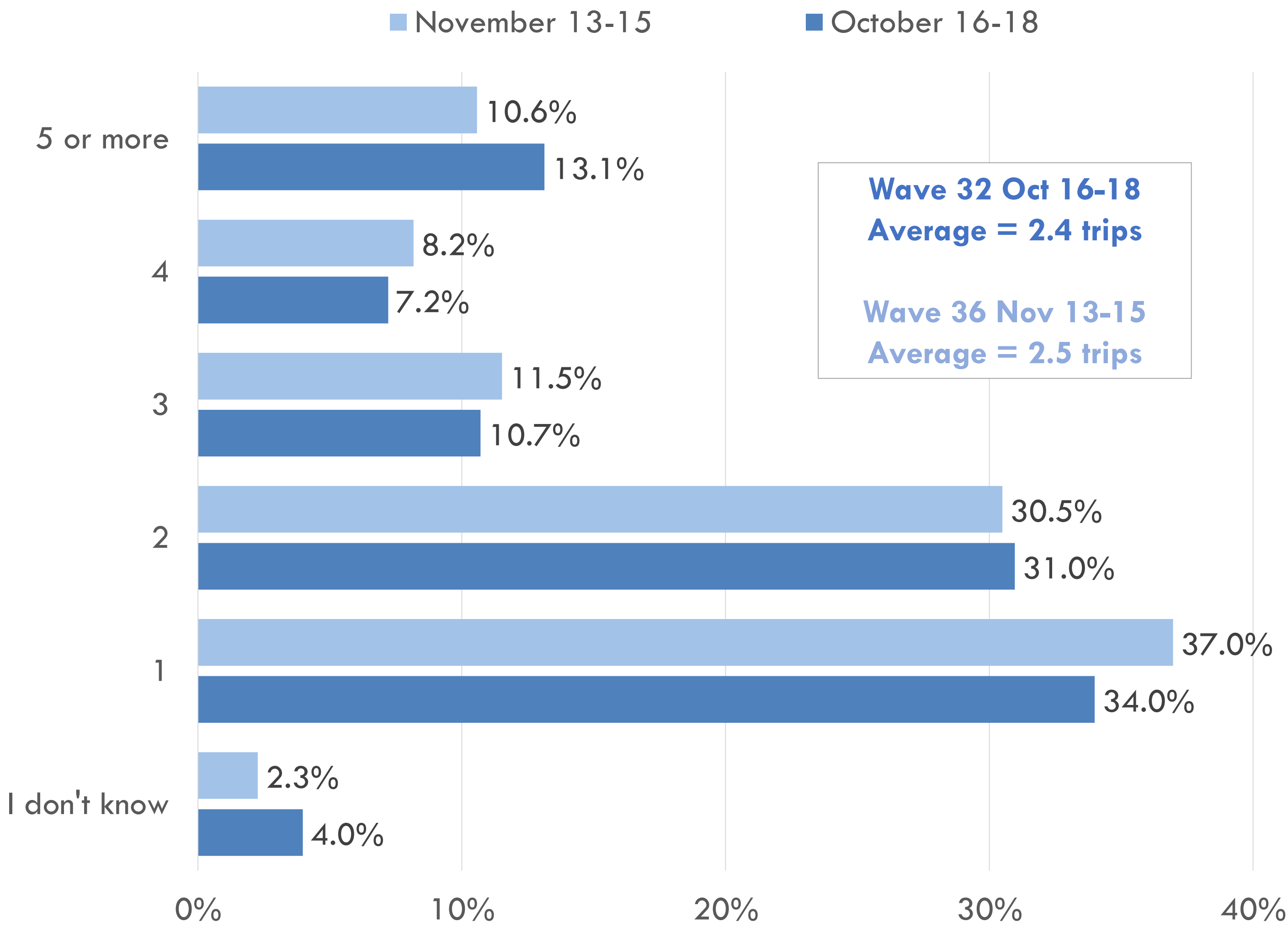


(Base: Wave 32 and 36 data. All respondents, 1,204 and 1,206 completed surveys. Data collected Oct 16-18 and Nov 13-15, 2020)

NUMBER OF HOLIDAY TRIPS THIS HOLIDAY SEASON

Question: How many trips (of 50 miles or more from your home) will you take this year to participate in/celebrate these holiday season events? (Select one)

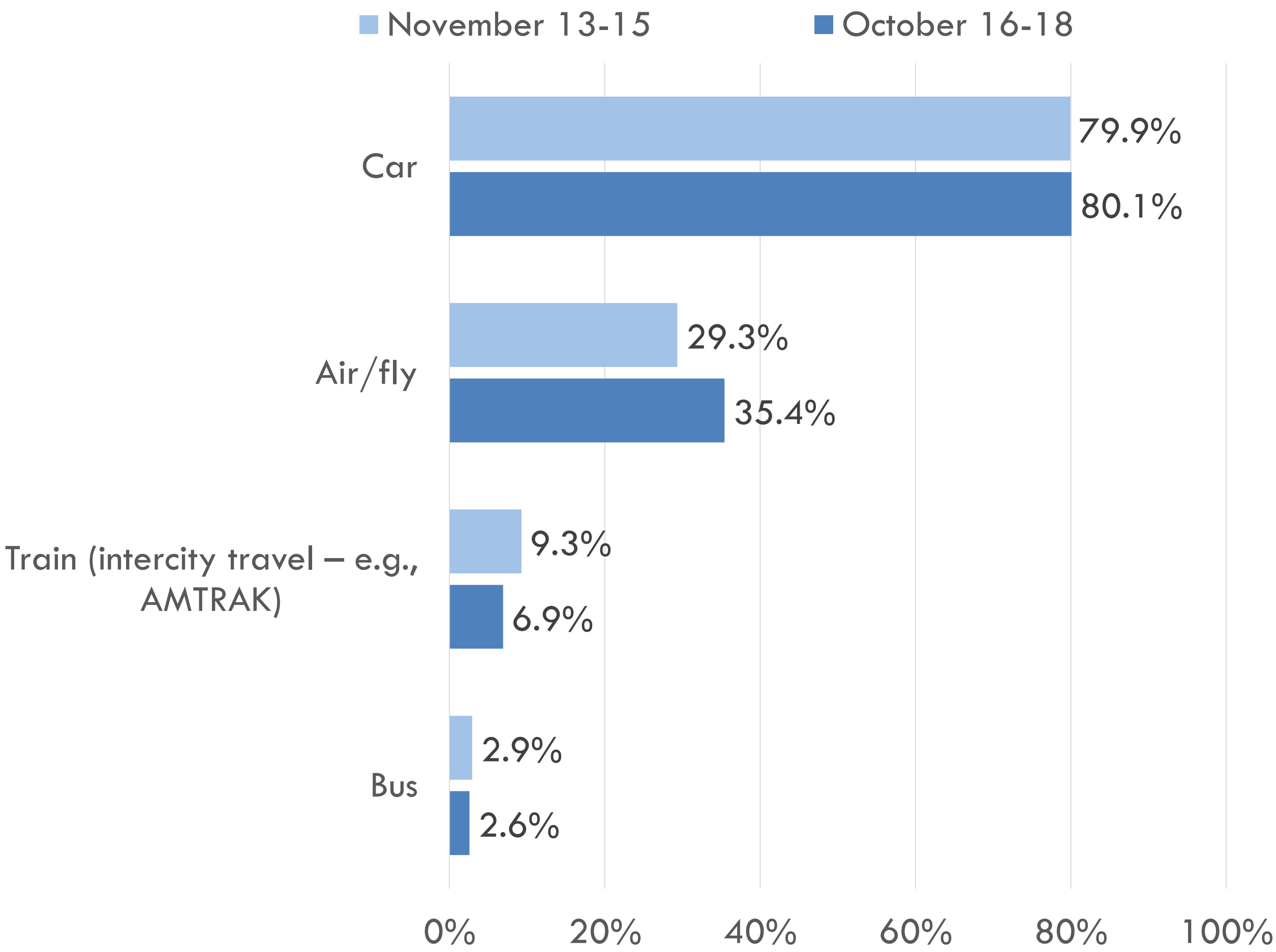
(Base: Wave 32 and 36 data. Those who have tentative holiday travel plans, 280 and 315 completed surveys. Data collected Oct 16-18 and Nov 13-15, 2020)



MODES OF TRAVEL USED FOR HOLIDAY TRIPS

Question: For these holiday season trip(s), which mode of transportation will you use to travel to your intended destination(s)?

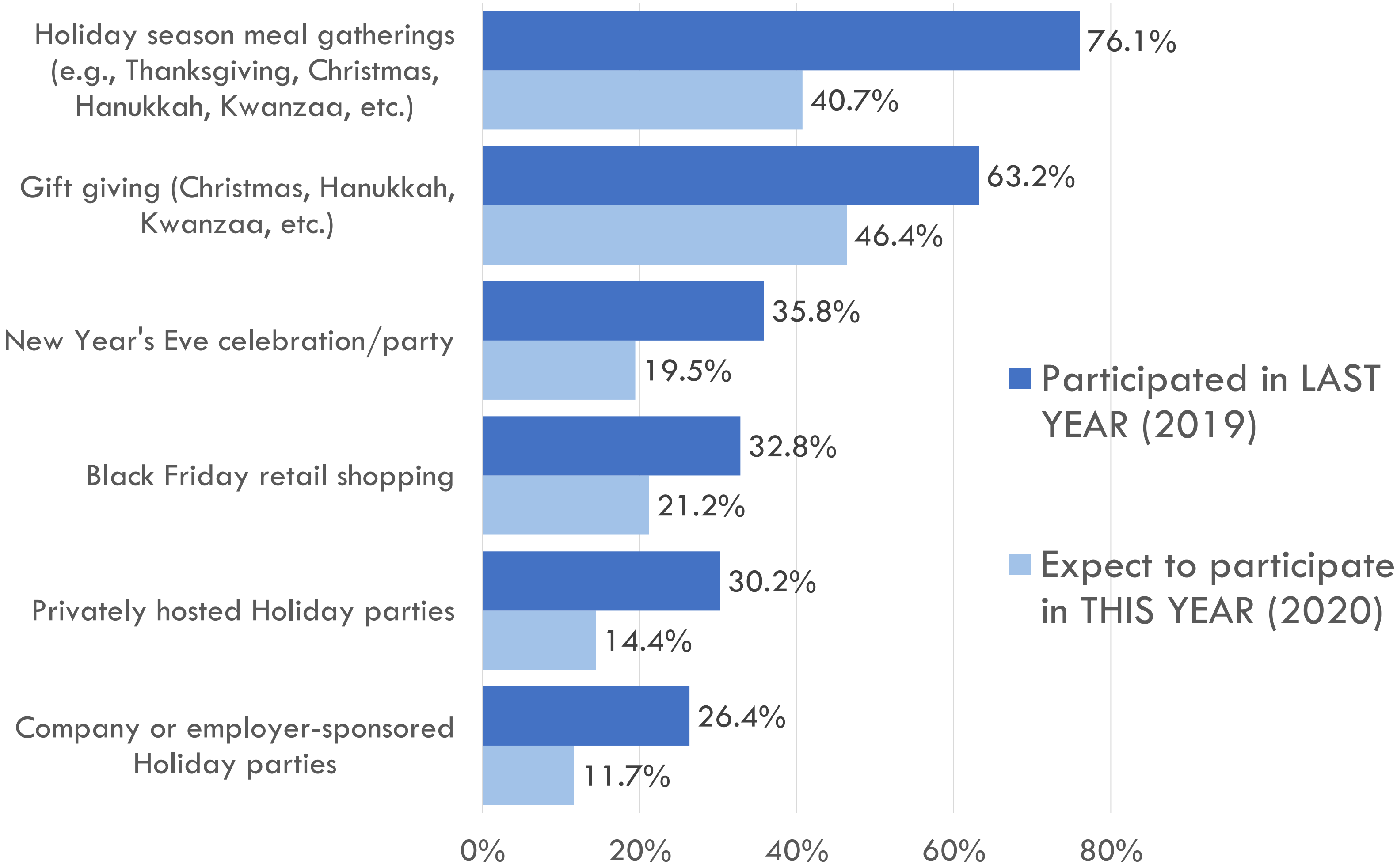
(Base: Wave 32 and 36 data. Those who have tentative holiday travel plans, 293 and 321 completed surveys. Data collected Oct 16-18 and Nov 13-15, 2020)



HOLIDAY TRADITIONS

Question: Which of these holiday traditions did you participate in last year? Which do you expect to participate in this year?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

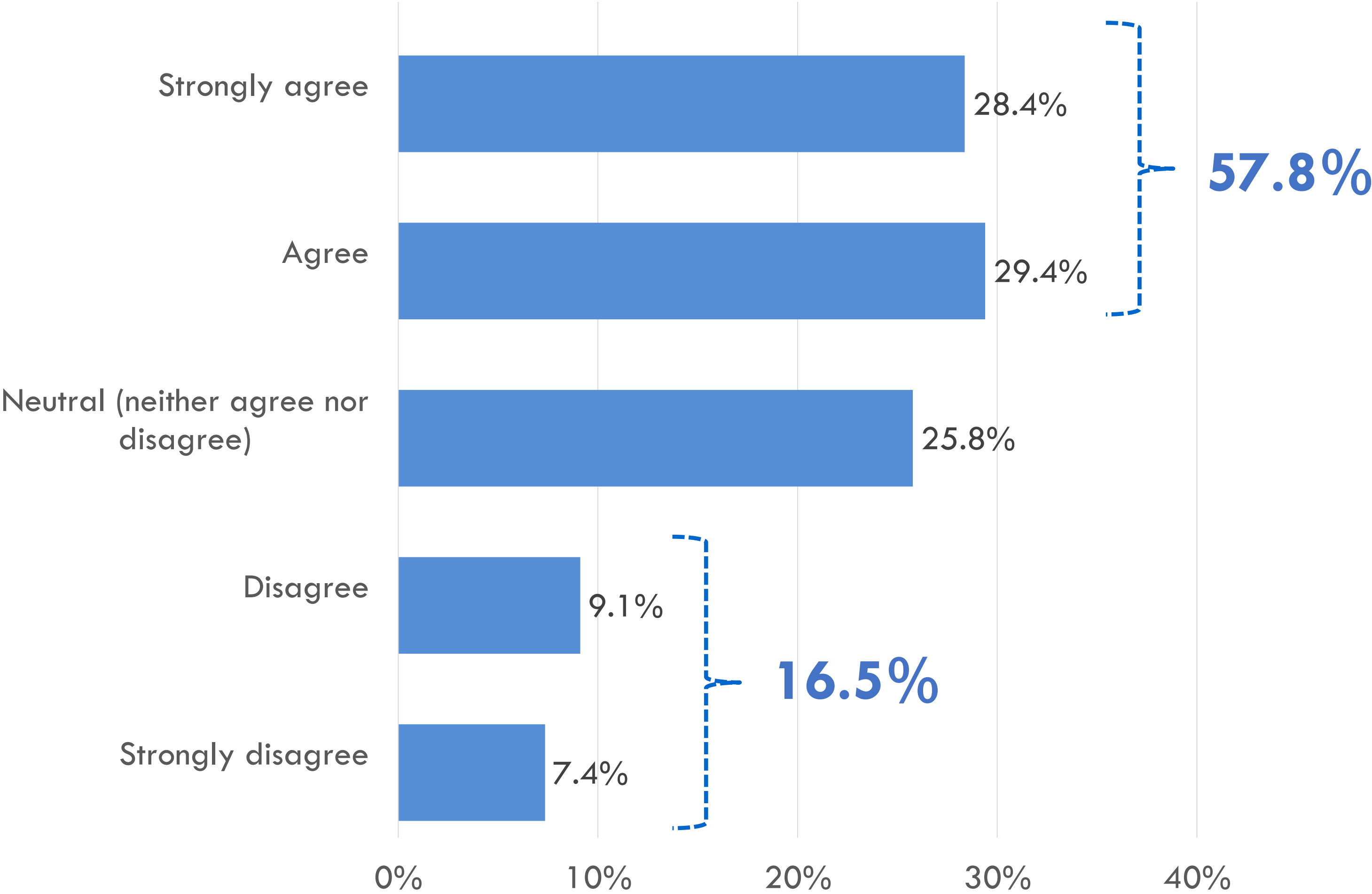


CHANGES TO HOLIDAY TRADITION ASPECTS

Question: How much do you agree or disagree with the following statements?

Because of the Coronavirus situation, I will be changing aspects of one (or more) holiday traditions this year

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

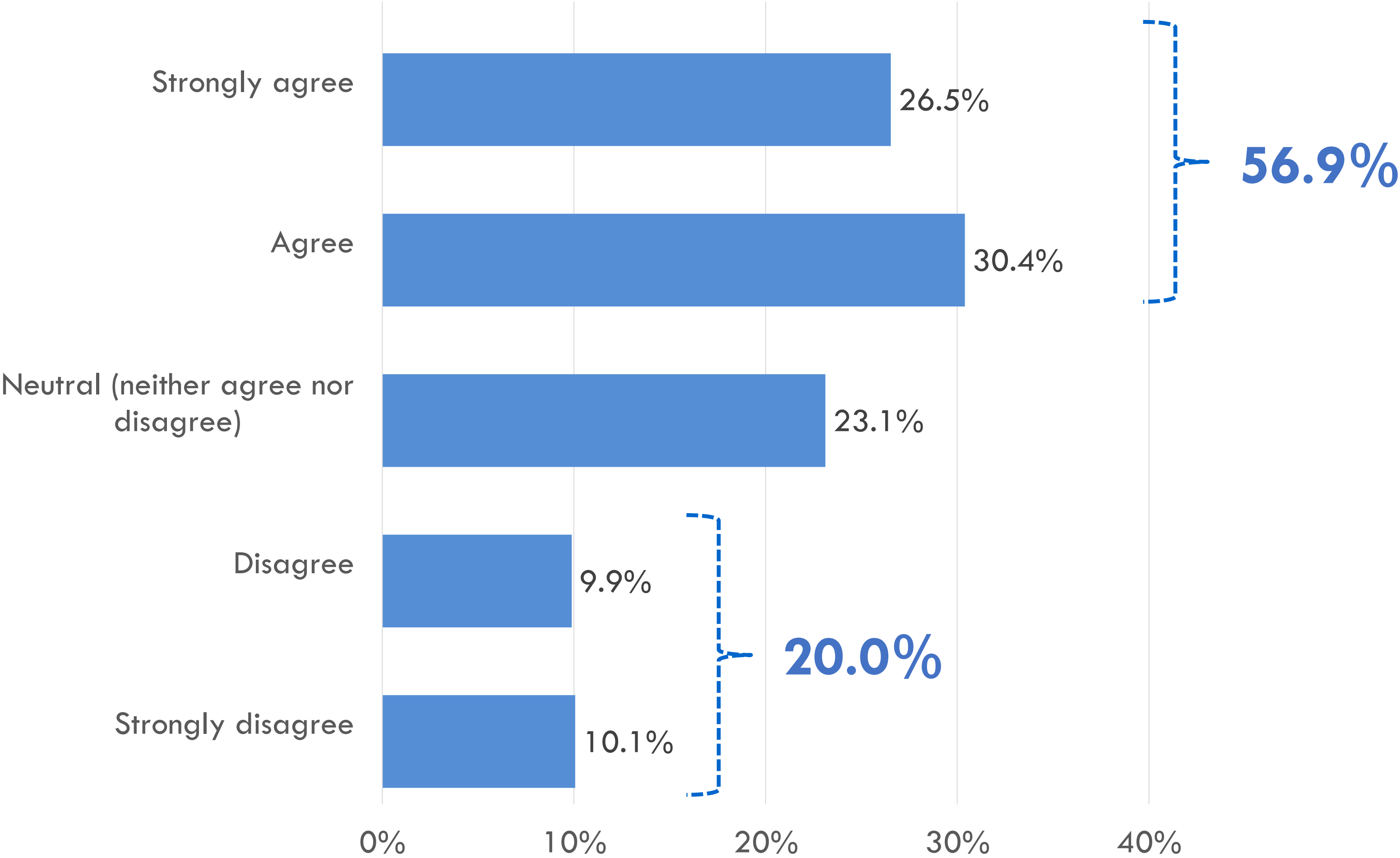


WORRIES ABOUT SPENDING HOLIDAY FAMILY TIME

Question: How much do you agree or disagree with the following statements?

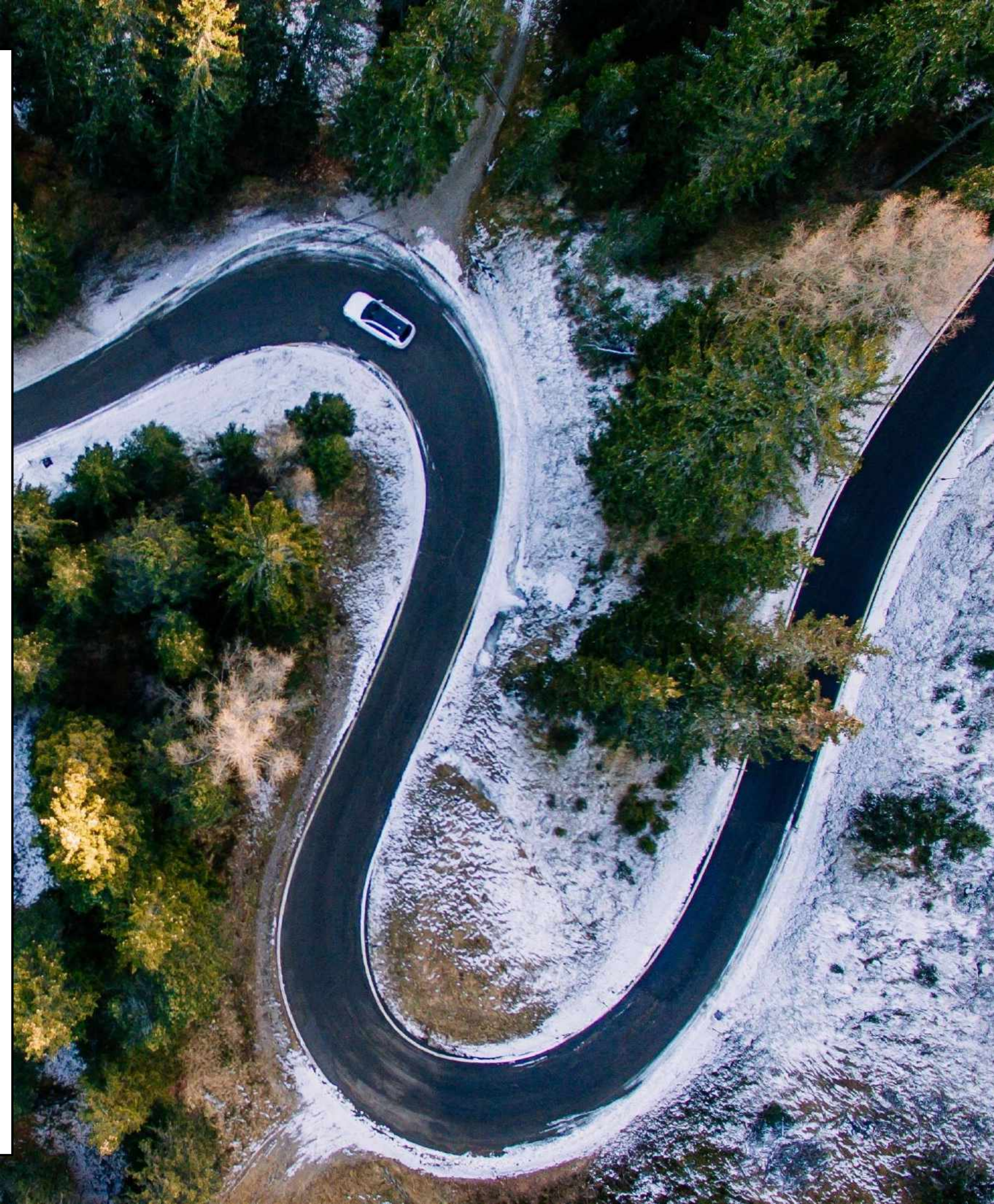
Because of the Coronavirus situation, I am worried about spending time with my family over the holidays.

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)



KEY TAKEAWAYS

- Holiday travel expectations are tracking below levels actual experienced last year—the percent of Americans who will be taking a holiday season-related trip is down ~25%
- Those who will travel during the holidays are planning on taking 2.5 trips on average, with 29.3% saying they will travel by air
- Worry about spending time with loved ones this holiday season may further dampen holiday expectations



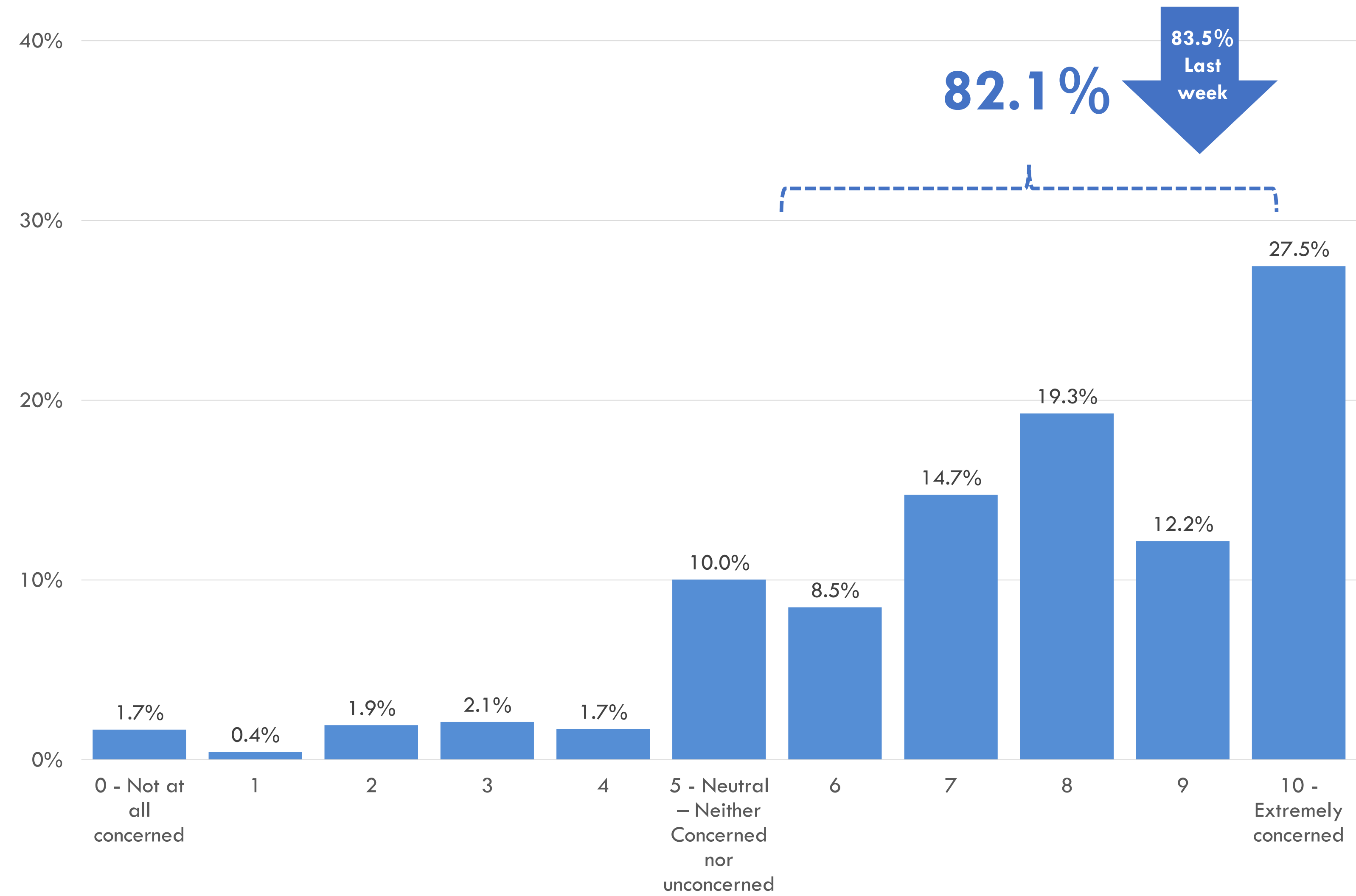
A low-angle, upward-looking perspective of several modern skyscrapers with glass facades, reaching towards a bright blue sky with scattered white clouds. The buildings are arranged in a circular pattern around the center of the frame, creating a sense of height and architectural grandeur. The text "POSITIVE INDICATORS FOR TRAVEL" is superimposed in the center in a bold, white, sans-serif font.

POSITIVE INDICATORS FOR TRAVEL

CONCERNS ABOUT NATIONAL ECONOMY

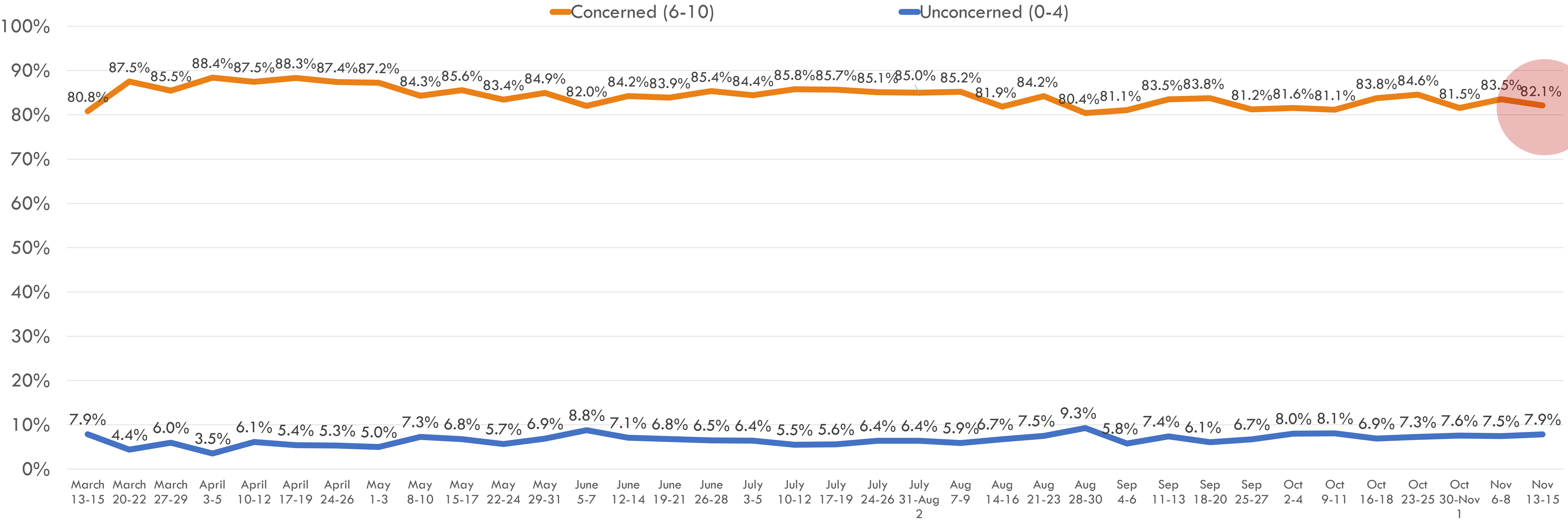
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)



CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-36)

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

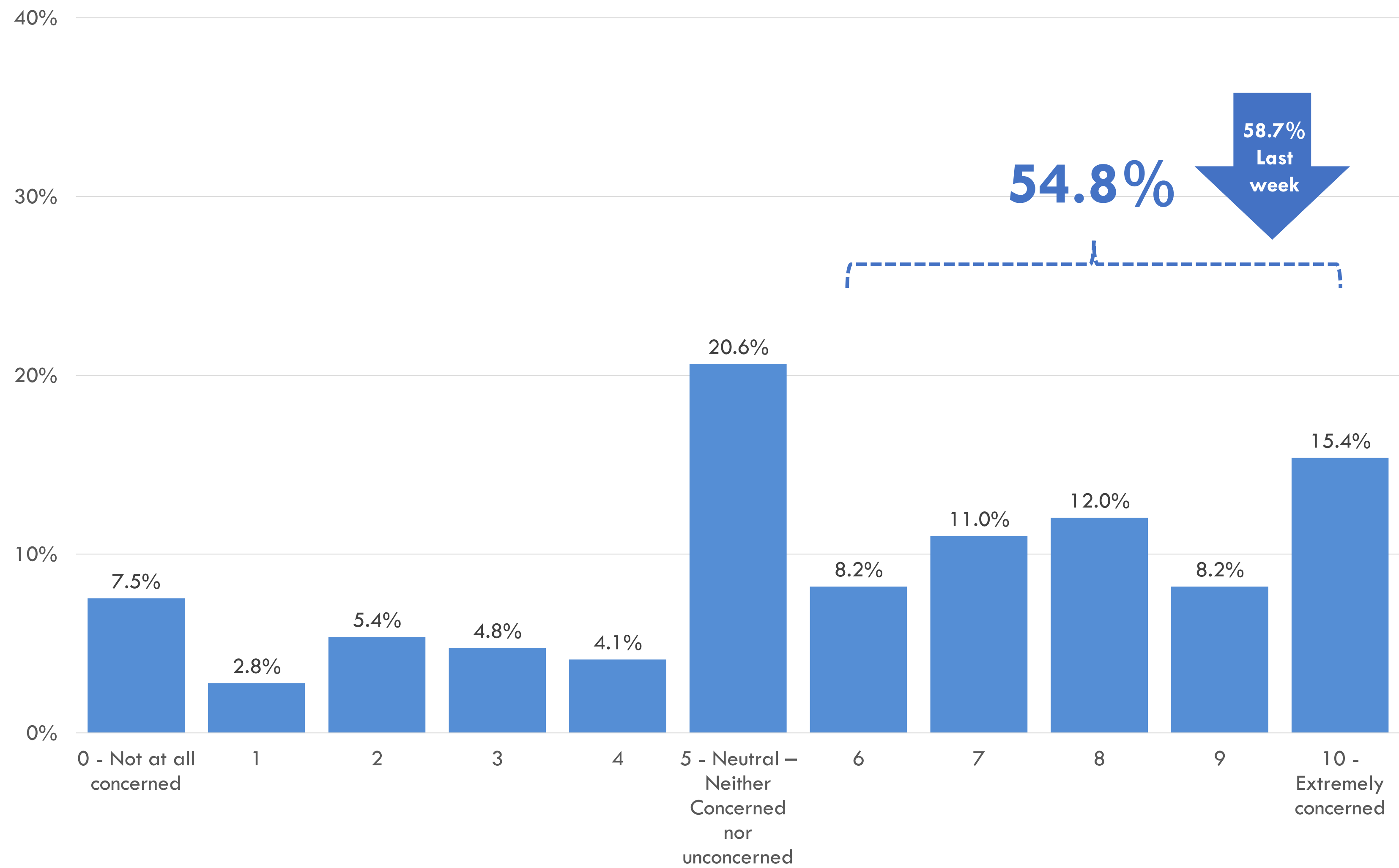


(Base: Waves 1-36. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

CONCERNS ABOUT PERSONAL FINANCES

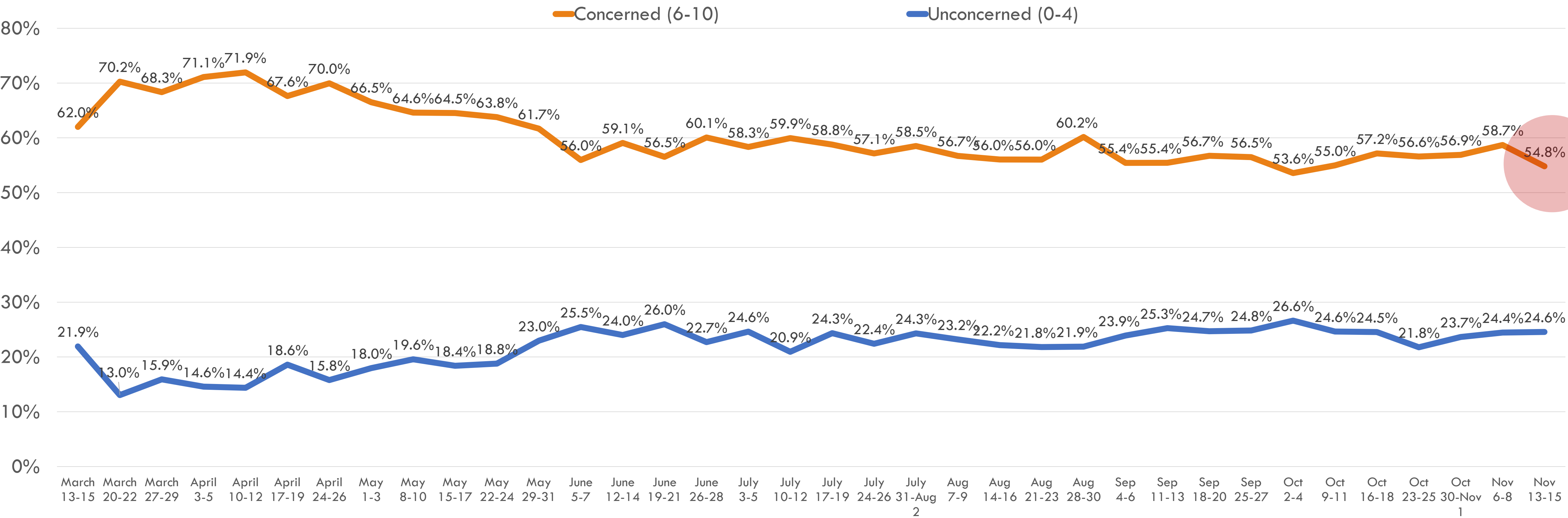
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)



CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-36)

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES**? (Please answer using the scale below)

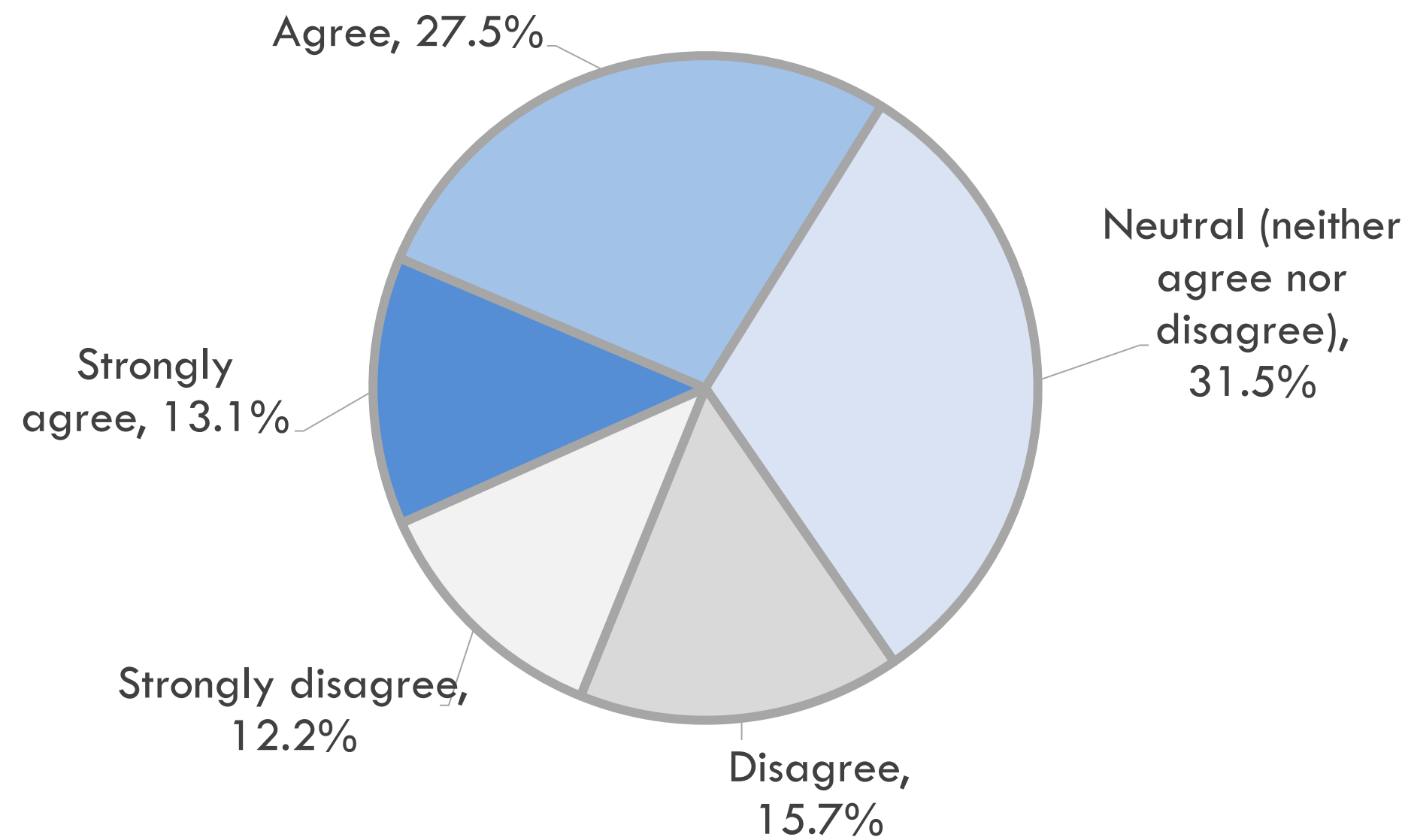


(Base: Waves 1-36. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

DISCOUNTS AND PRICE CUTS

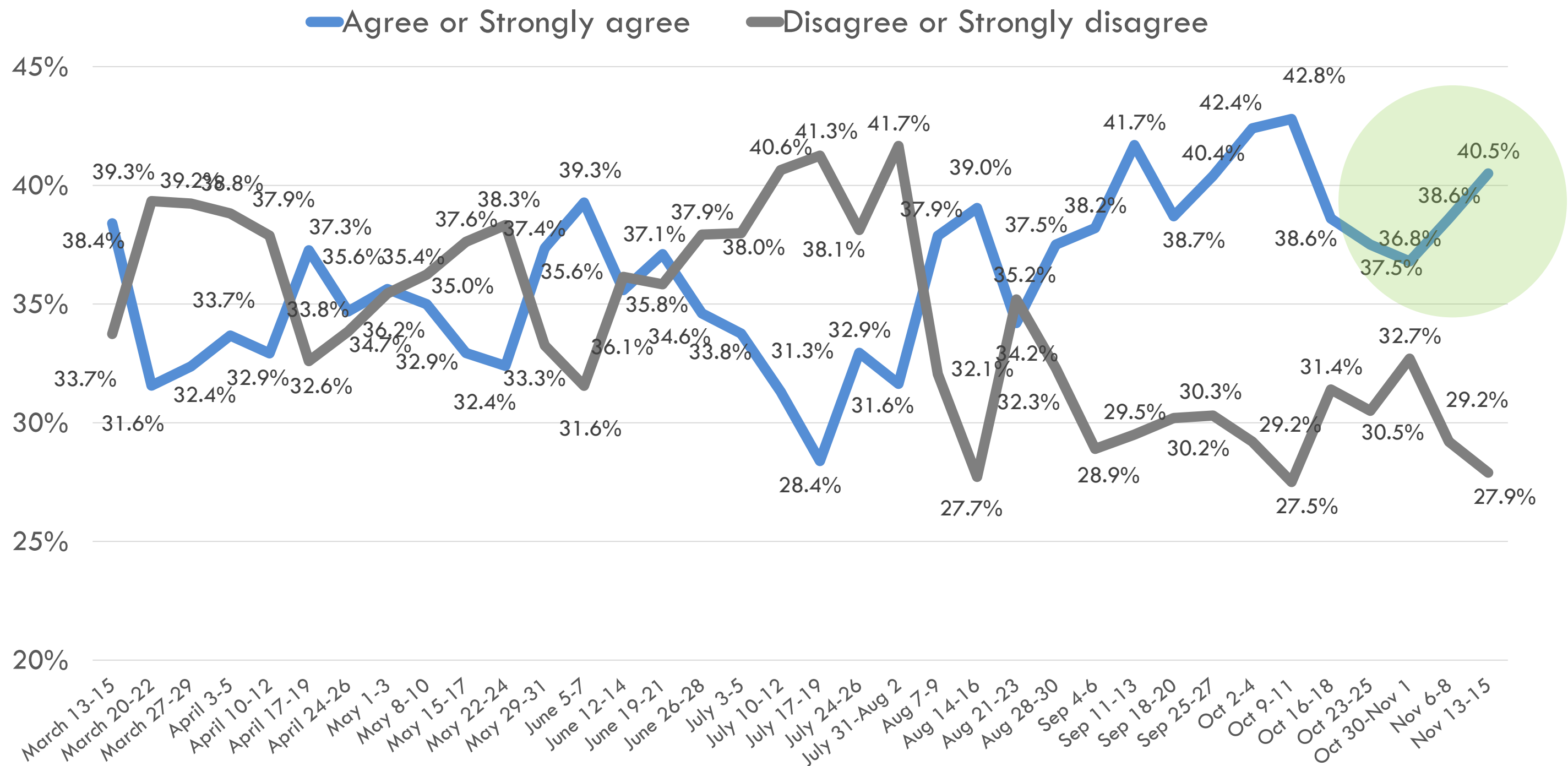
How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.



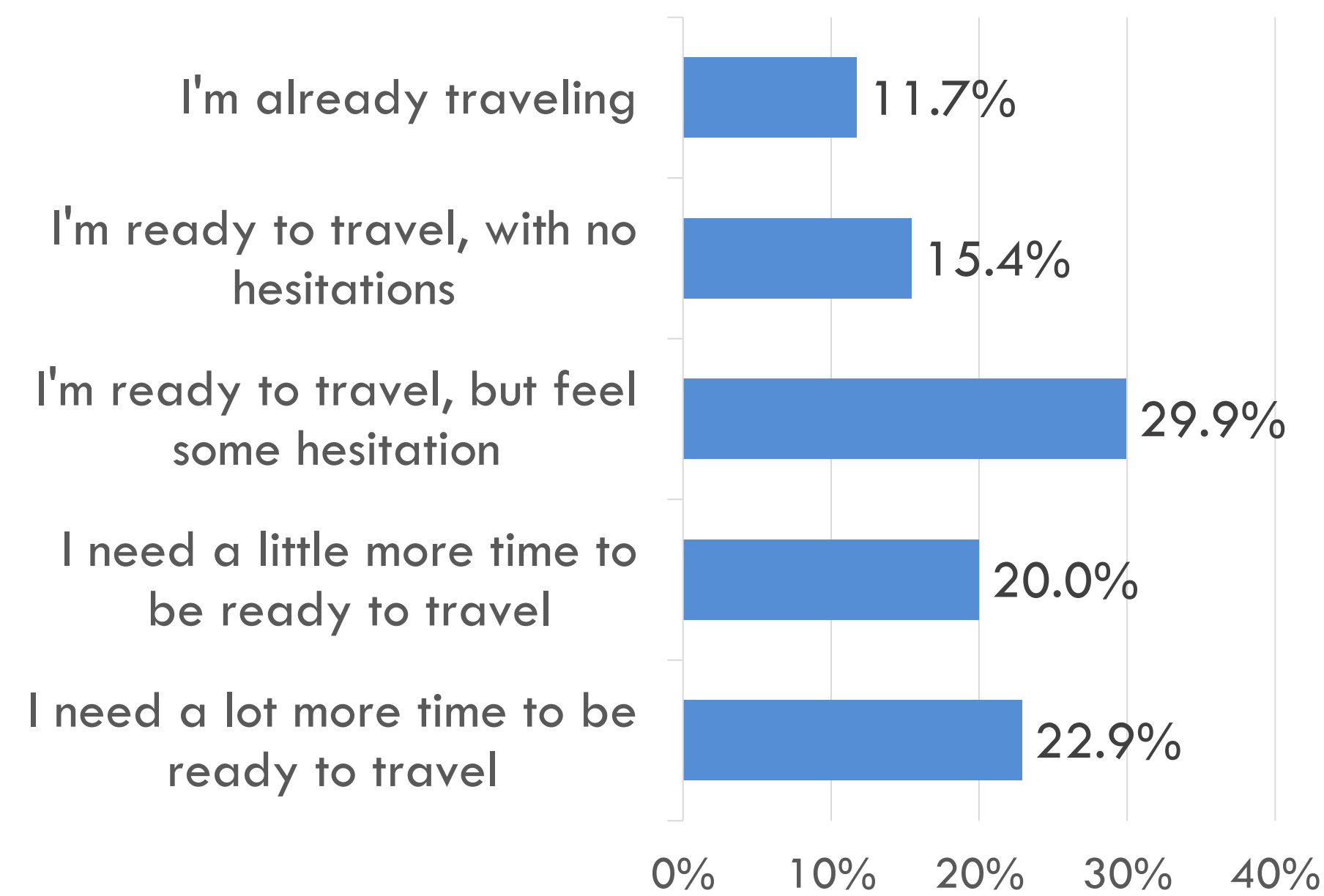
(Base: Waves 1-36. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

Historical data



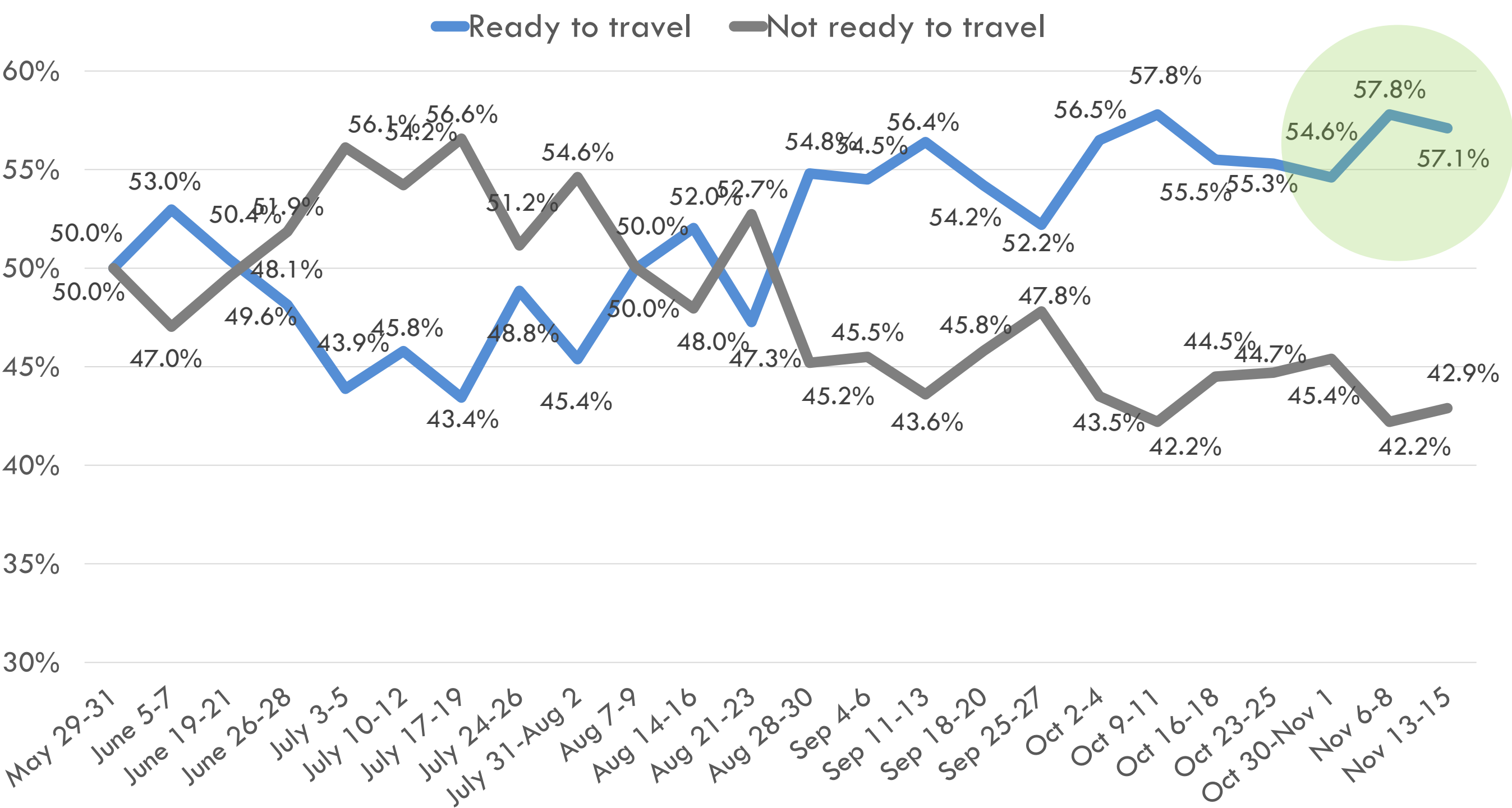
TRAVEL STATE-OF-MIND

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 15-36. 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 and 1,206 completed surveys.)

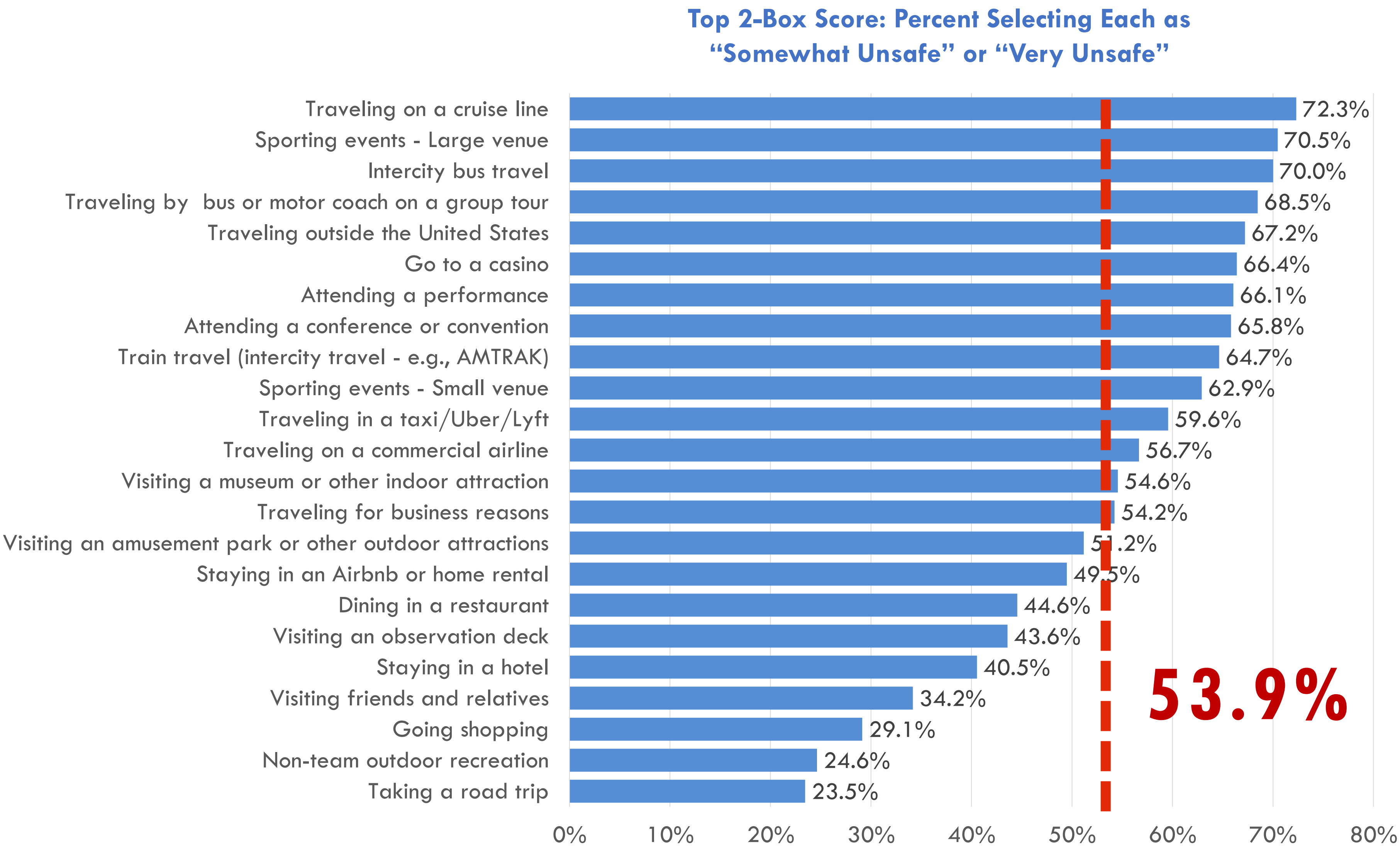
Historical data



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 36)

Question: At this moment, how safe would you feel doing each type of travel activity?

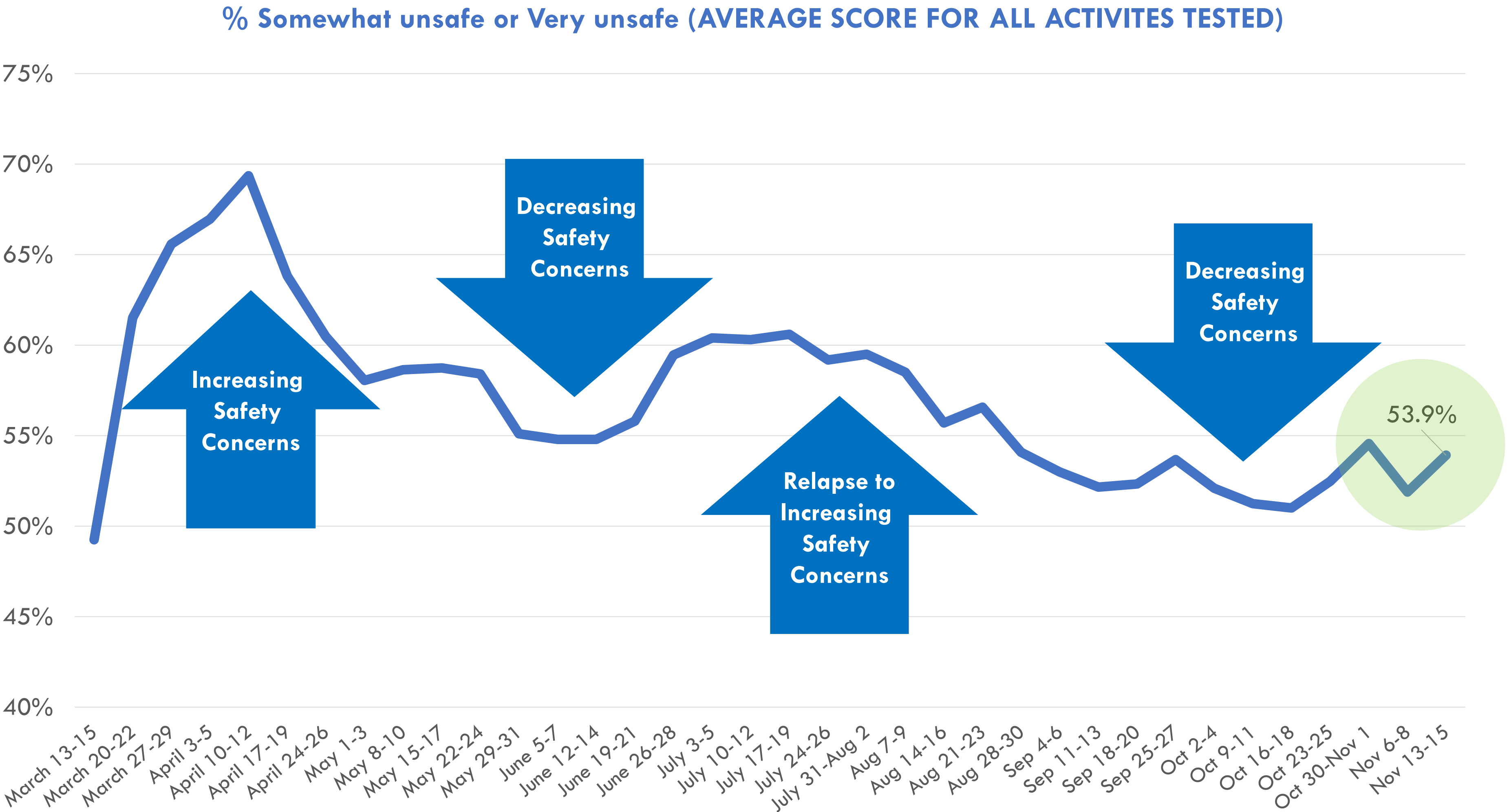
(Base: Wave 36 data. All respondents, 1,206 completed surveys.
Data collected Nov 13-15, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-36 COMPARISON)

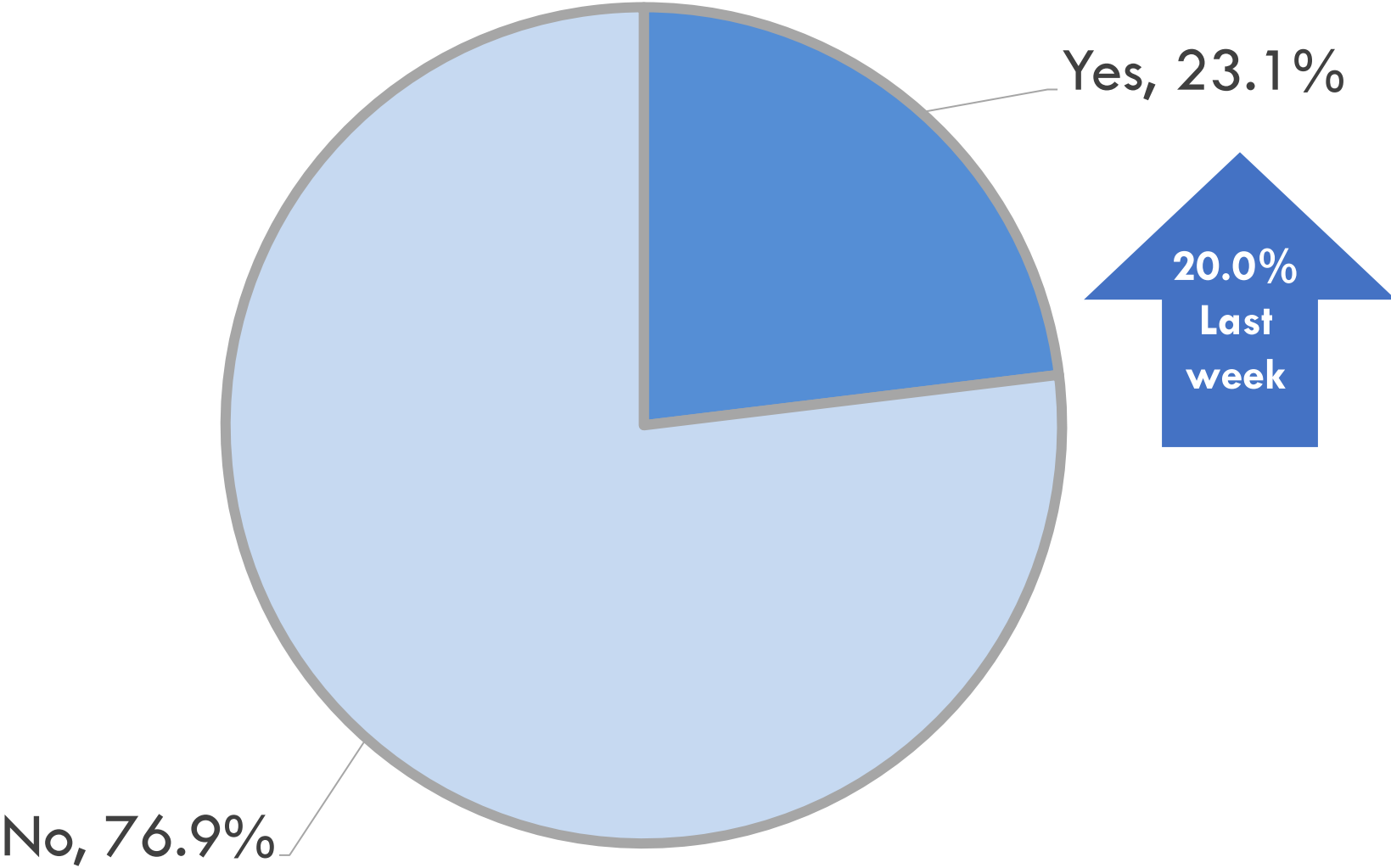
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 1-36. 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 and 1,206 completed surveys.)

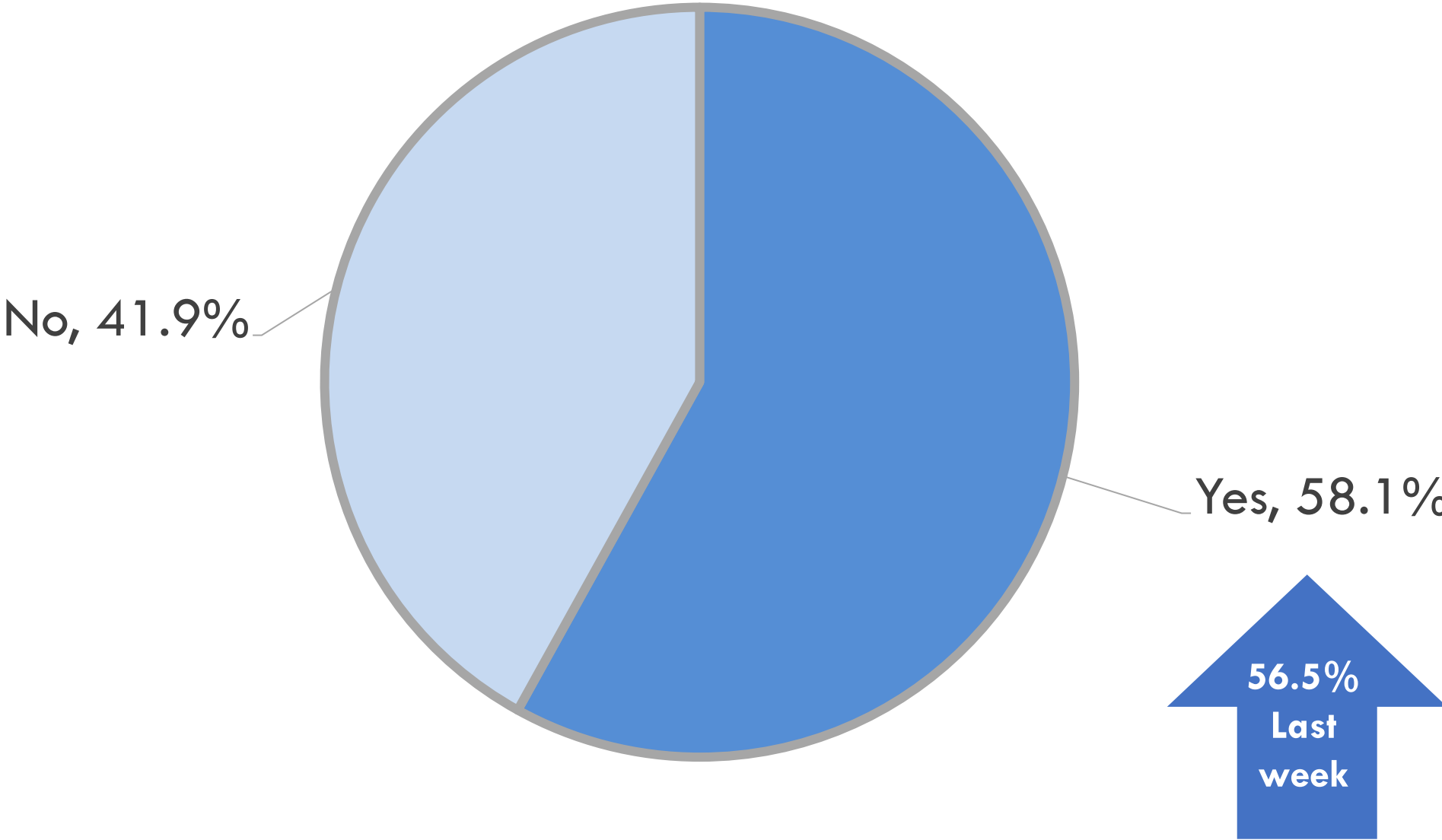


ROAD & AIR TRAVEL DURING THE PANDEMIC

Question: Have you traveled on a commercial airline since the start of the Coronavirus pandemic (March 2020 to today)?



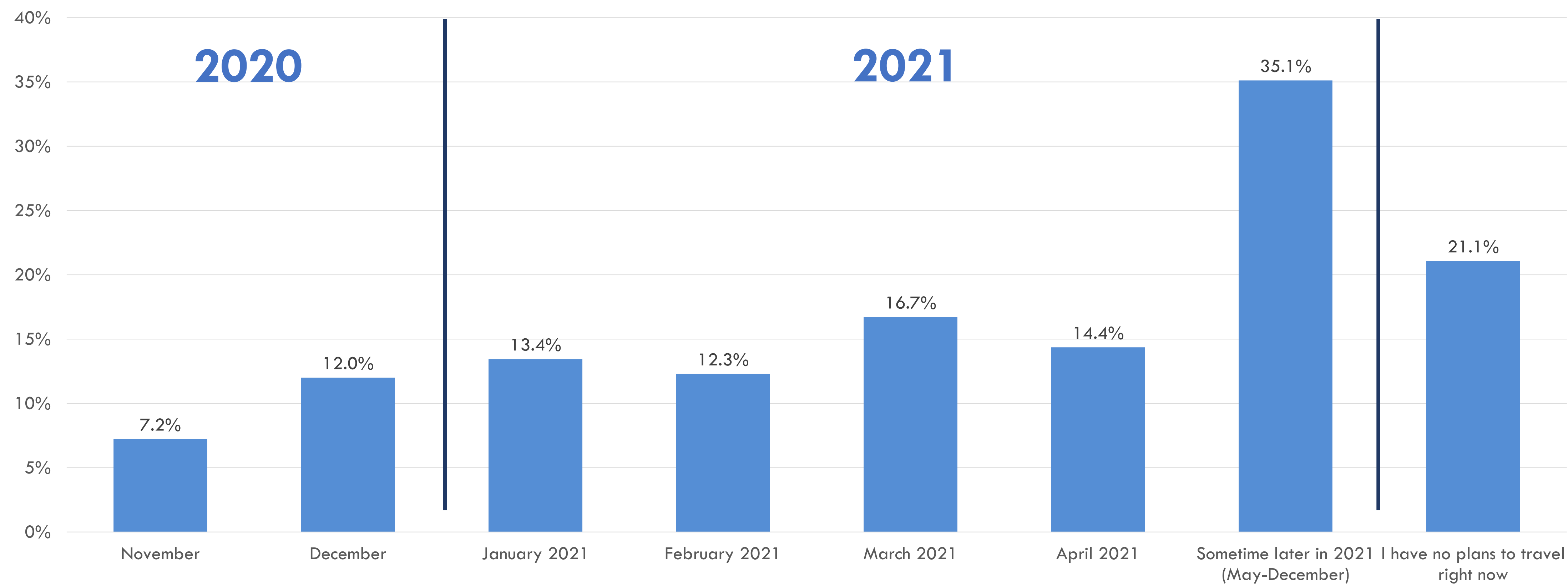
Question: Have you taken any road trips (50 miles or more from your home) since the start of the Coronavirus pandemic (March 2020 to today)?



(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

UPCOMING TRAVEL PLANS

Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?

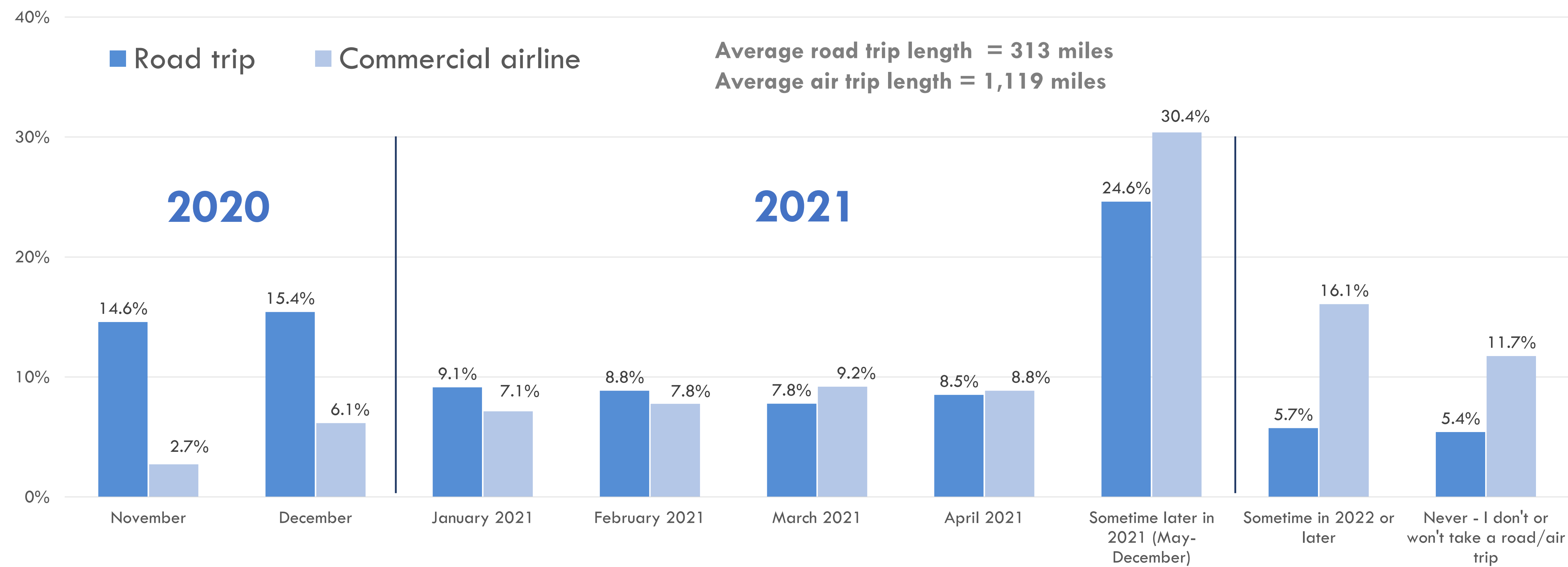


(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

ROAD & AIR TRIPS EXPECTED

Question: In what month do you expect you will take your **NEXT ROAD TRIP** (Traveling in a personal automobile)?

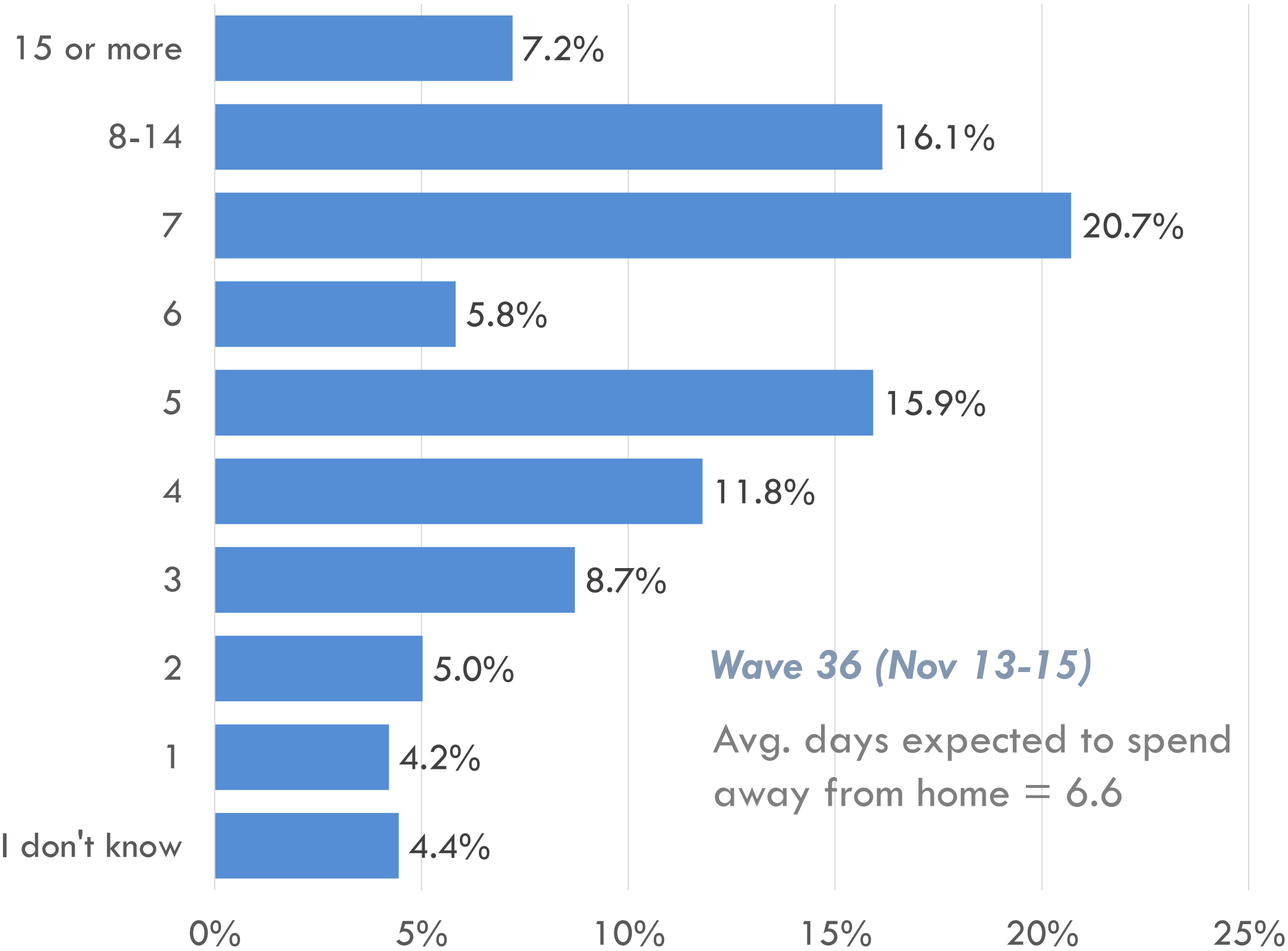
Question: In what month do you expect you will take your **NEXT TRIP** on a commercial airline?



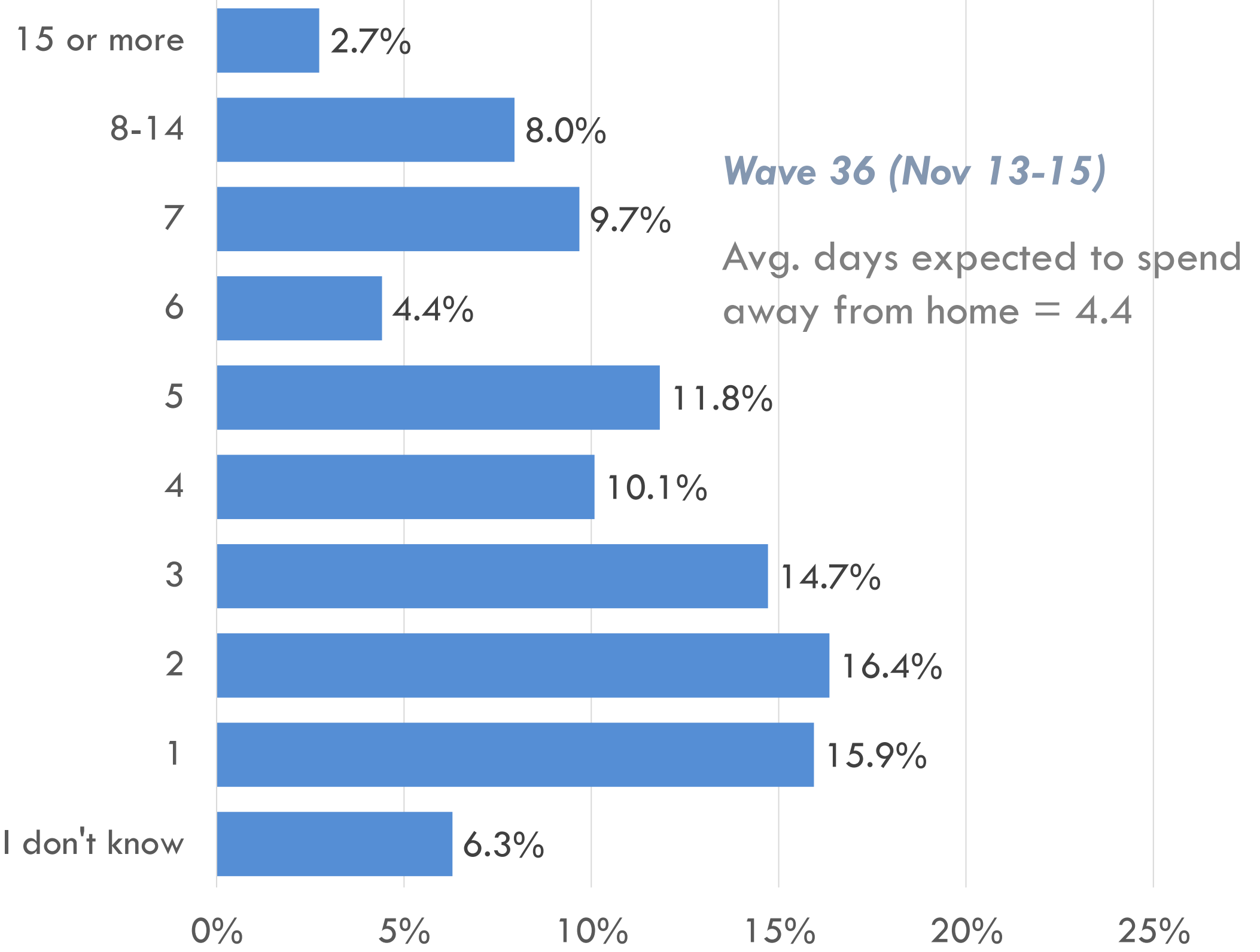
(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

DAYS EXPECTED TO SPEND AWAY FROM HOME

Question: On your next TRIP ON A COMMERCIAL AIRLINE, how many days away from home do you expect to spend? (Select one)



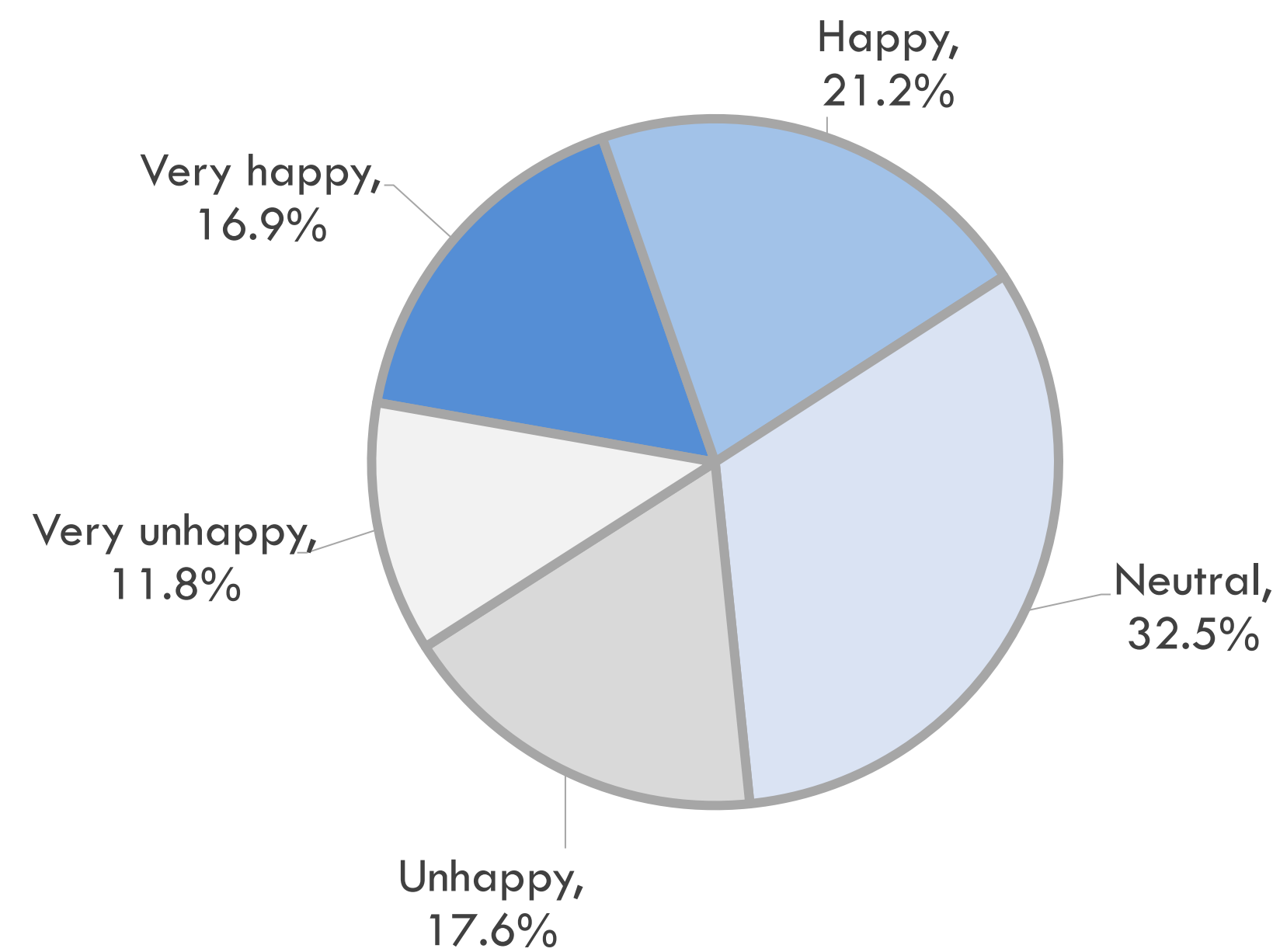
Question: On your next ROAD TRIP, how many days away from home do you expect to spend? (Select one)



(Base: Wave 36 data. Respondents expecting to take a trip in the future on a commercial airline/road trip, 1,011/1,053 completed surveys. Data collected Nov 13-15, 2020)

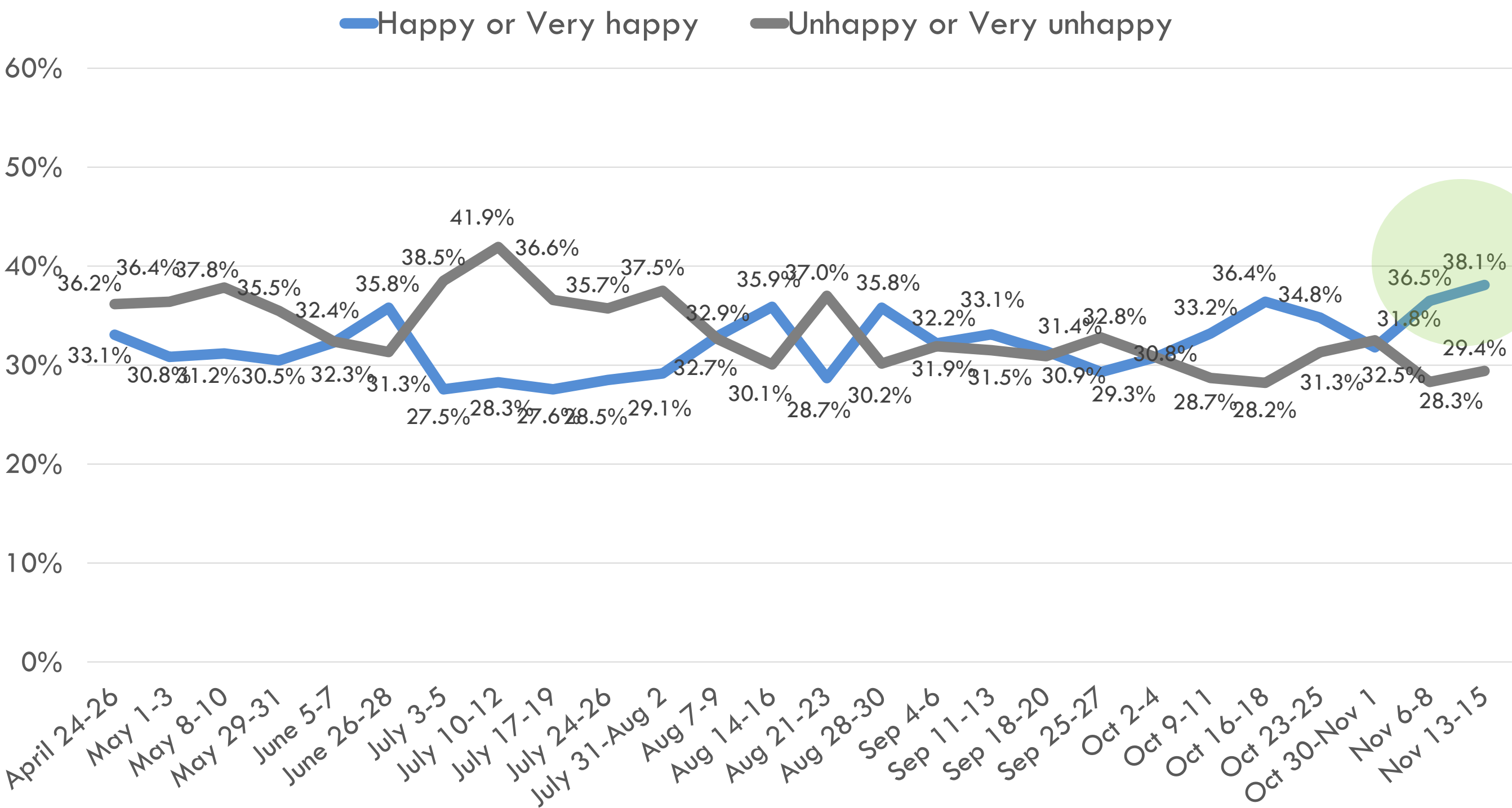
FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

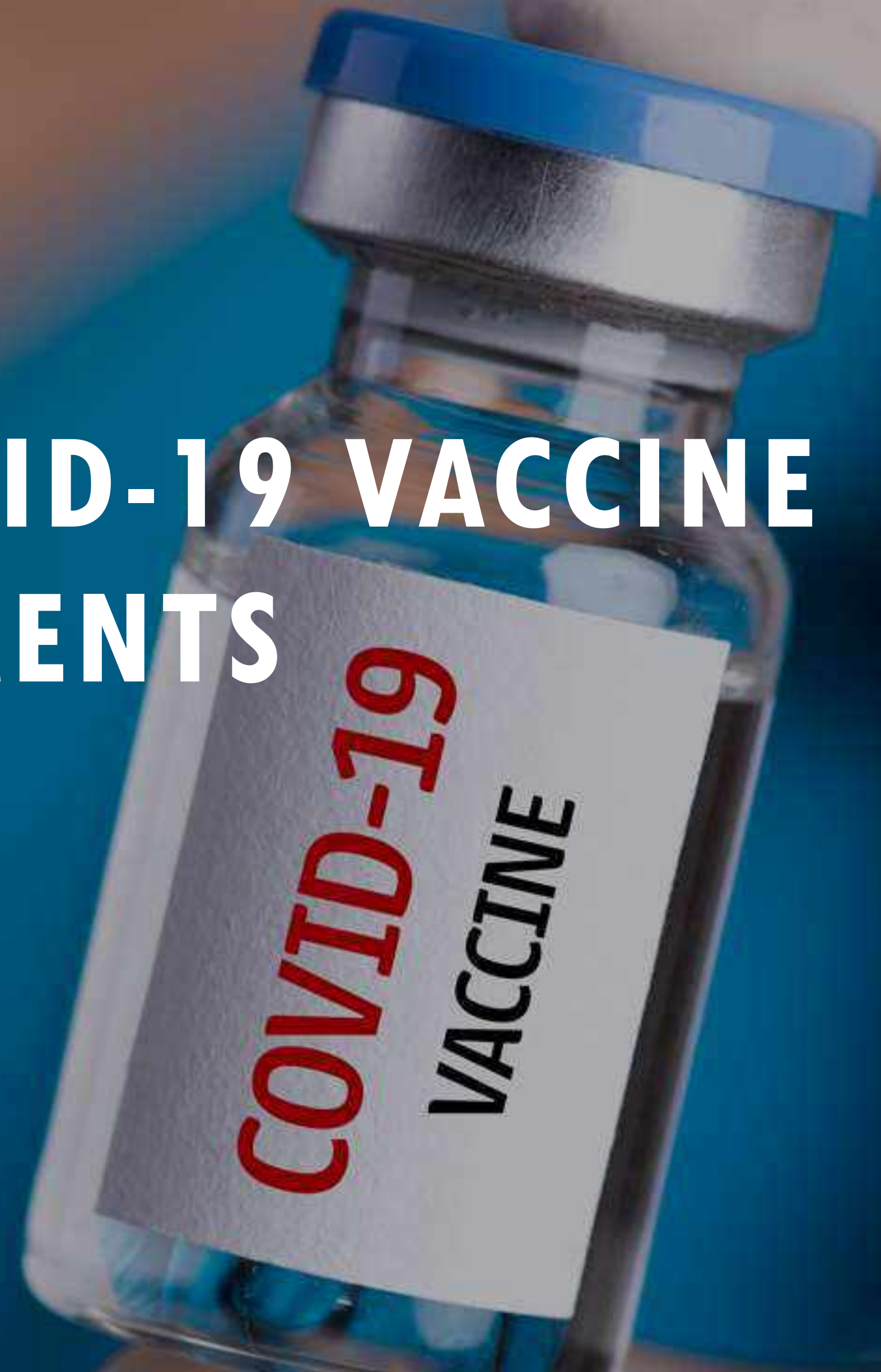


(Base: Waves 7-9, 12-13 and 16-36. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,206 completed surveys.)

Historical data



THE IMPACT OF COVID-19 VACCINE DEVELOPMENTS

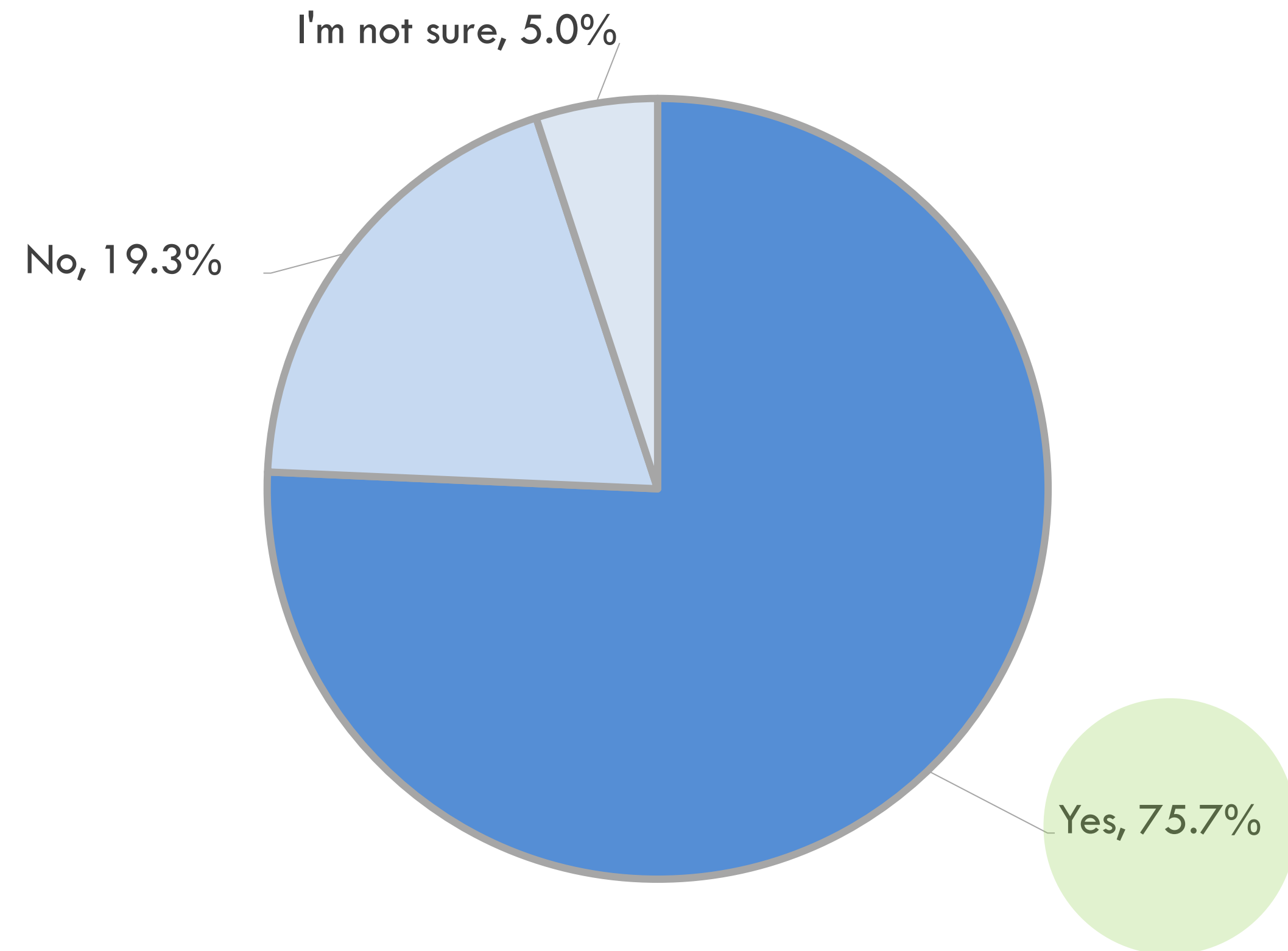


AWARENESS OF PFIZER'S EXPERIMENTAL VACCINE

This week, Pharmaceutical company Pfizer (and its German partner BioNTech) announced that a preliminary analysis suggests their experimental vaccine is more than 90 percent effective at preventing the Coronavirus disease.

Question: Before taking this survey, were you aware of this news?

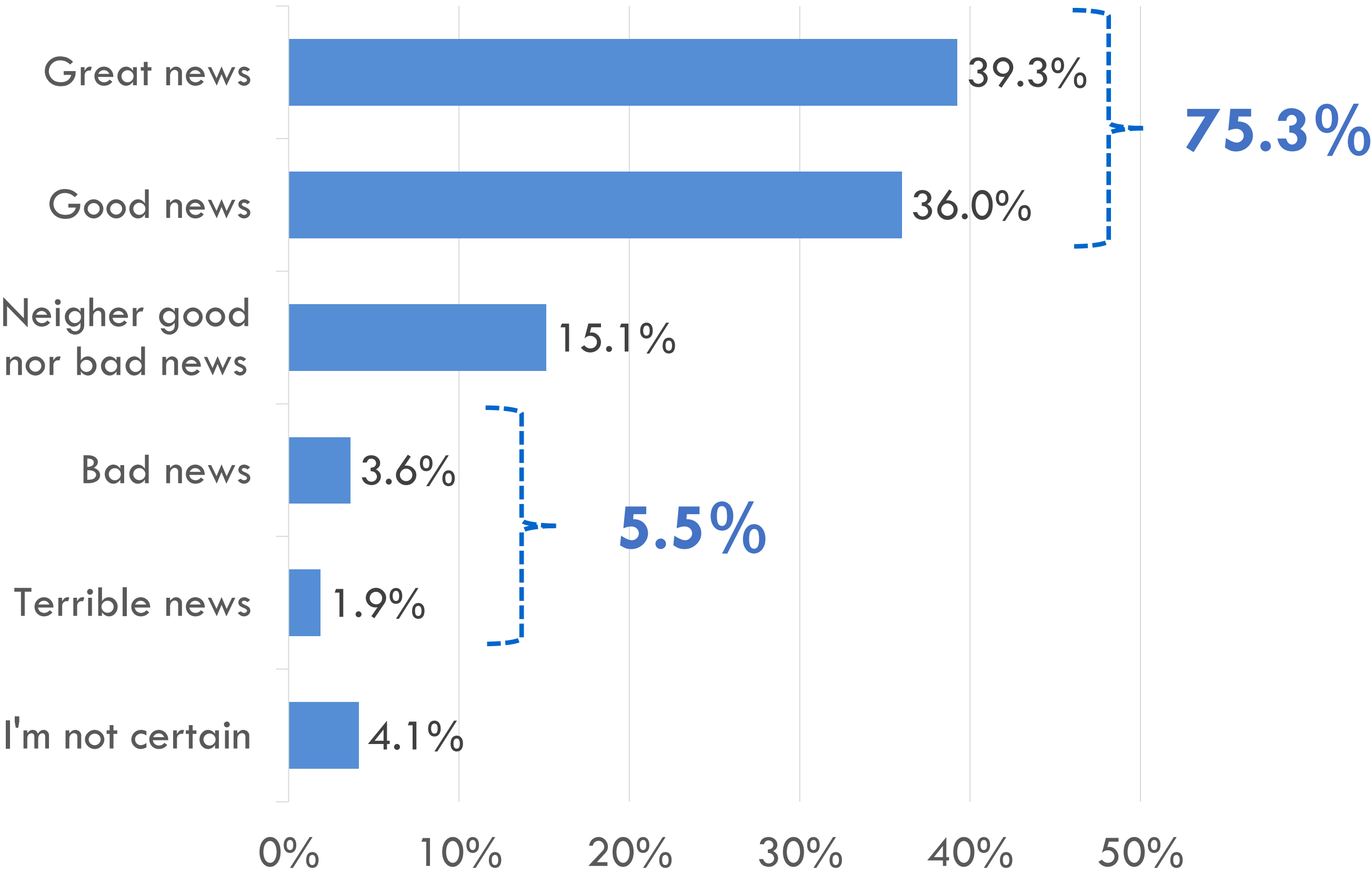
(Base: Wave 36 data. All respondents, 1,201 completed surveys. Data collected Nov 13-15, 2020)



PERCEPTION OF PFIZER'S VACCINE NEWS

Question: Which would you consider the news about potentially effective Pfizer vaccine to be? (Select one)

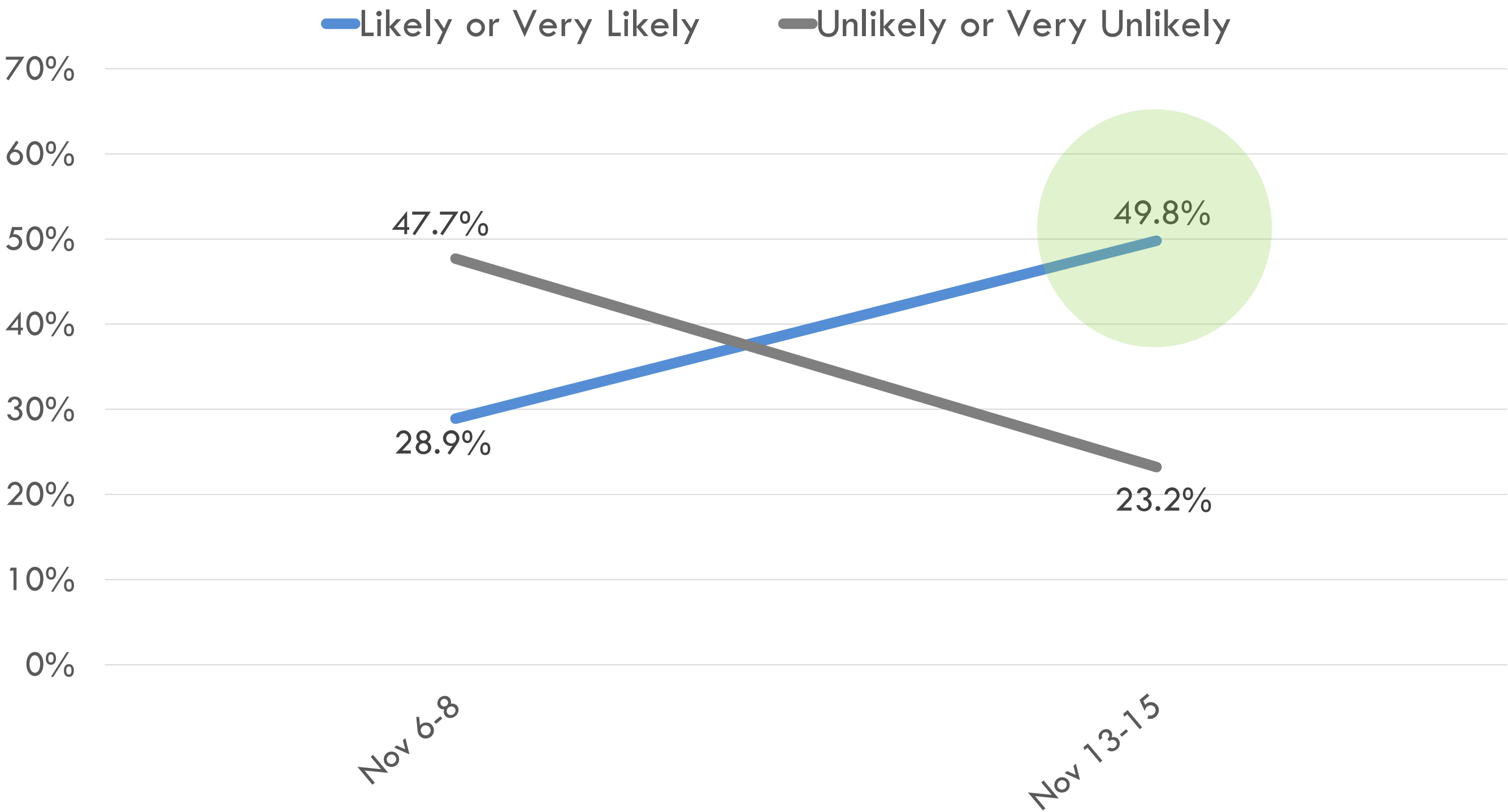
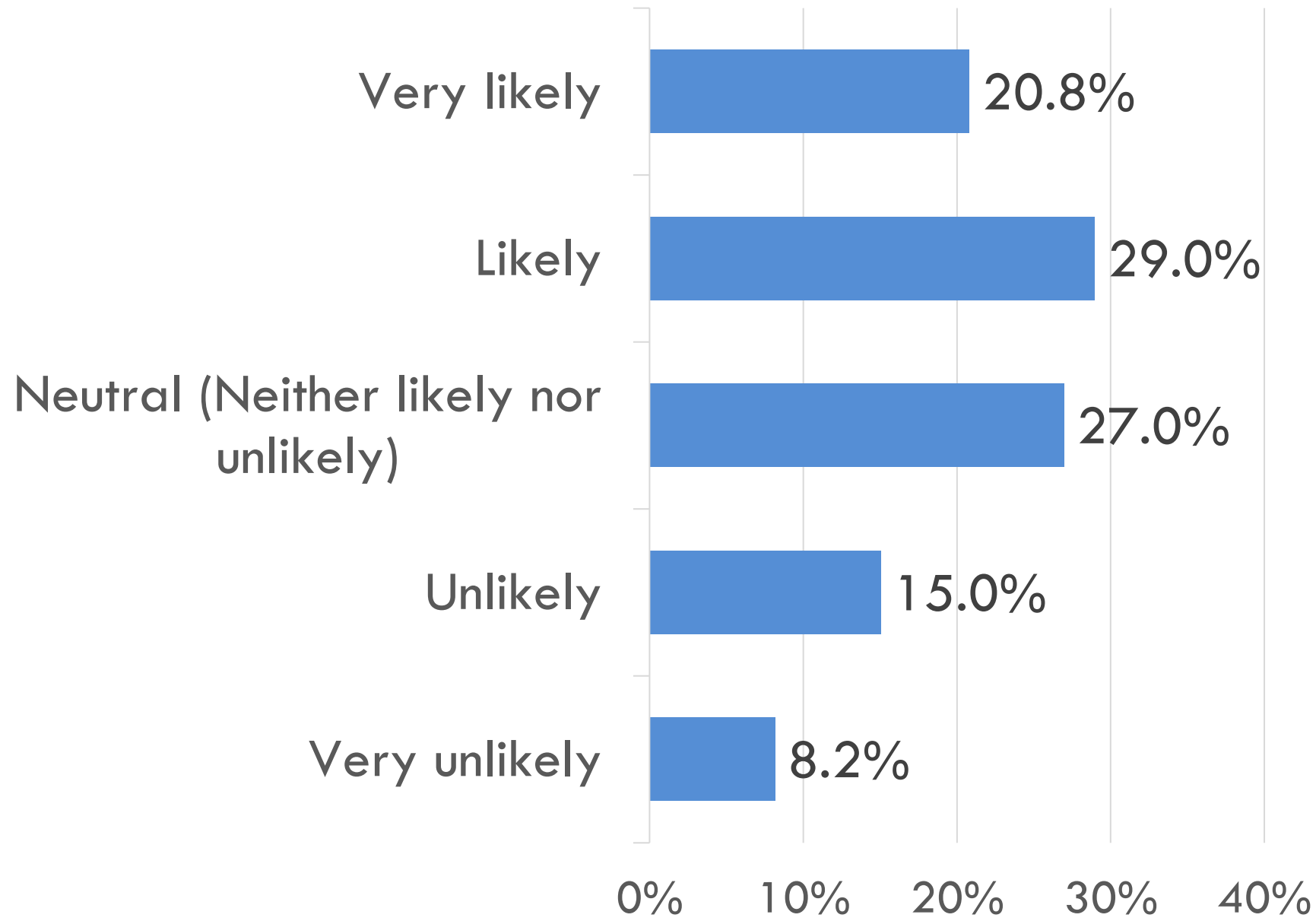
(Base: Wave 36 data. All respondents, 1,203 completed surveys. Data collected Nov 13-15, 2020)



LIKELIHOOD OF AN EFFECTIVE VACCINE BEING DEVELOPED BY YEAR END

Question: How likely do you think it is that an effective COVID-19 vaccine will be developed by the end of this year? (Select one)

Historical data



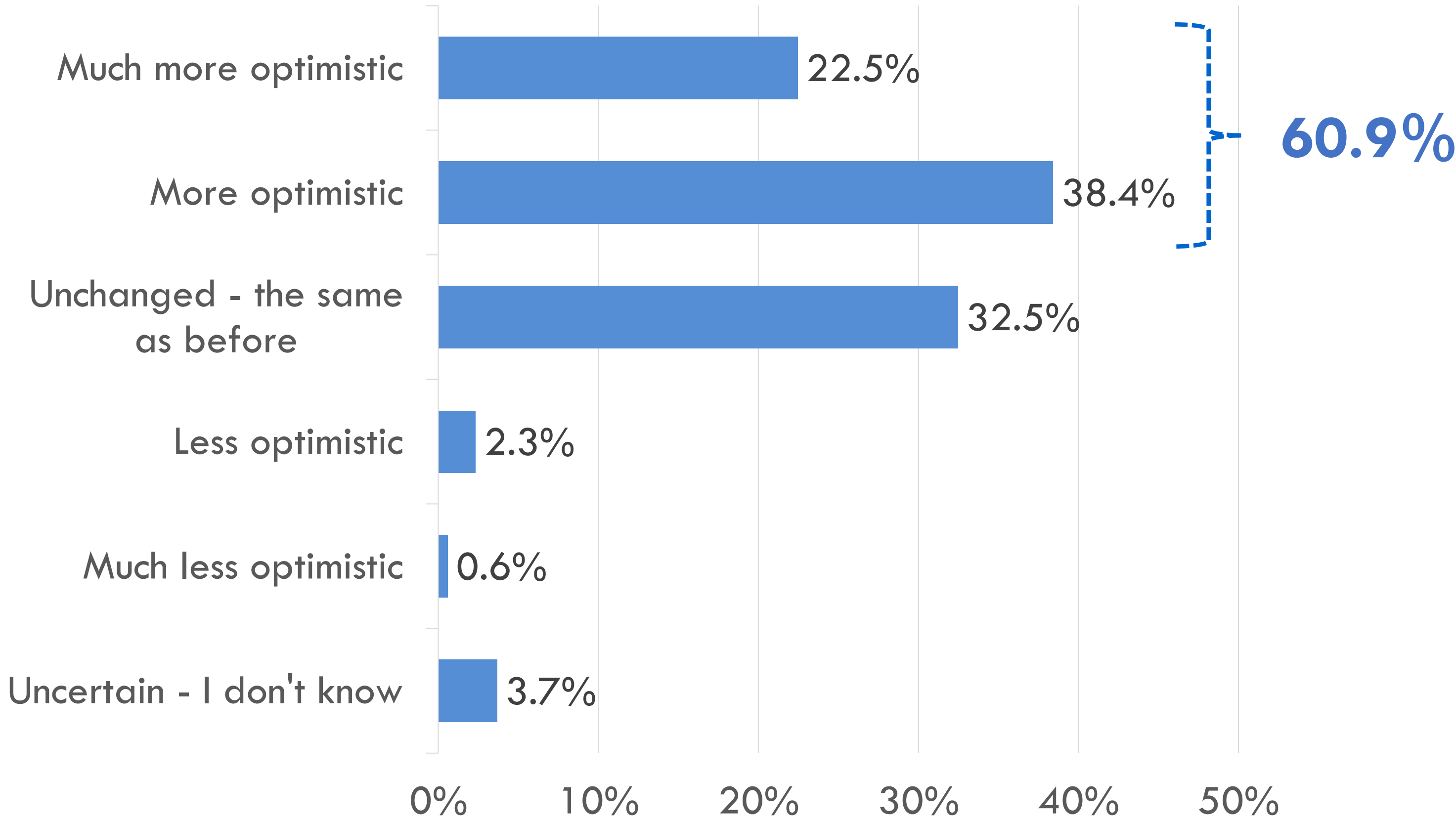
(Base: Wave 35-36 data. All respondents, 1,205 and 1,206 completed surveys.)

PFIZER'S EFFECT ON OPTIMISM ABOUT TRAVELING SAFELY

Question: How does the news about potentially effective Pfizer vaccine affect your optimism about being able to travel safely next year? (Select one to complete the sentence)

This news makes me _____
about traveling safely next year.

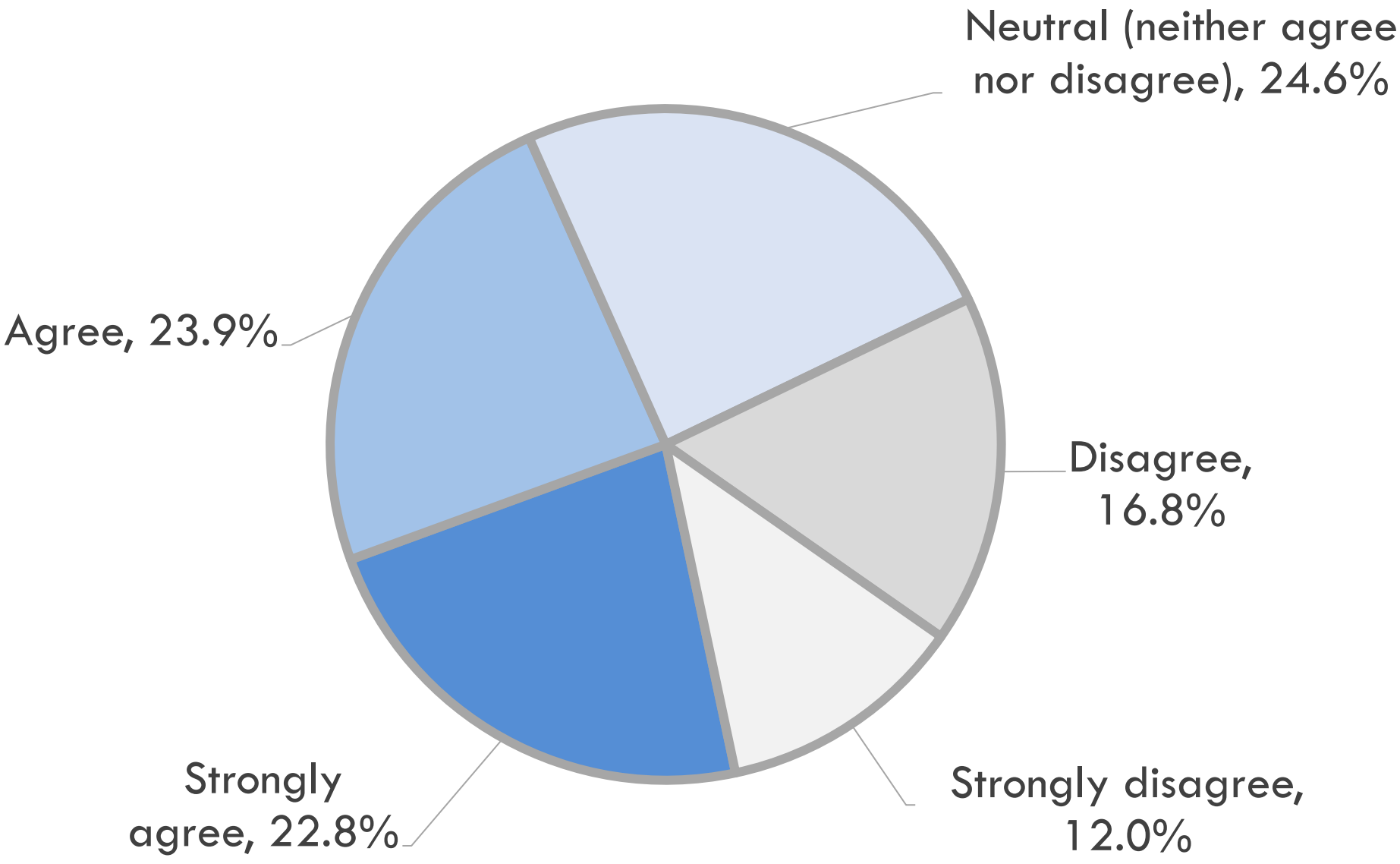
(Base: Wave 36 data. All respondents, 1,200 completed surveys. Data collected Nov 13-15, 2020)



WON'T TRAVEL WITHOUT VACCINE

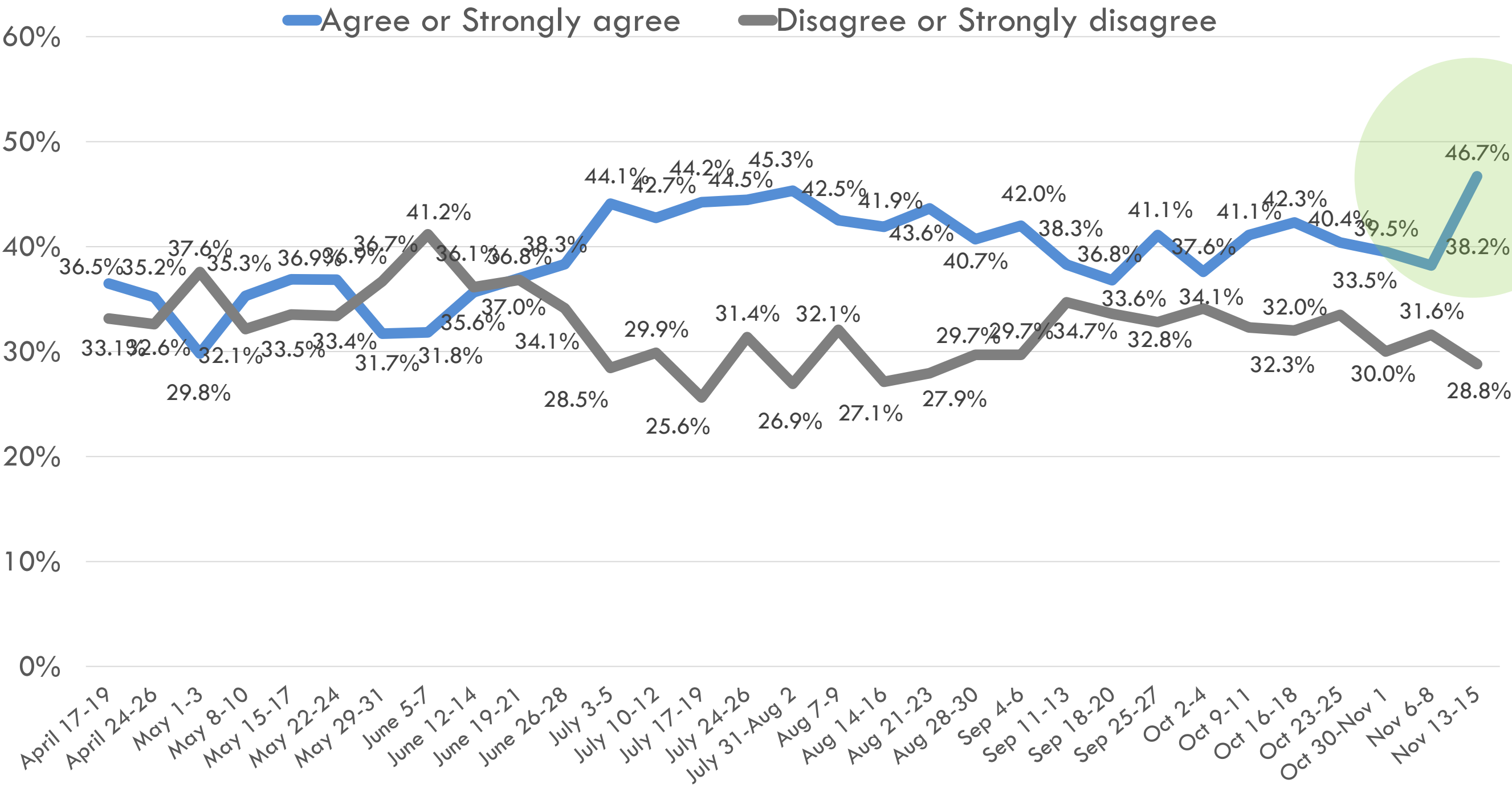
How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.



(Base: Waves 6-36. All respondents, 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 and 1,206 completed surveys.)

Historical data

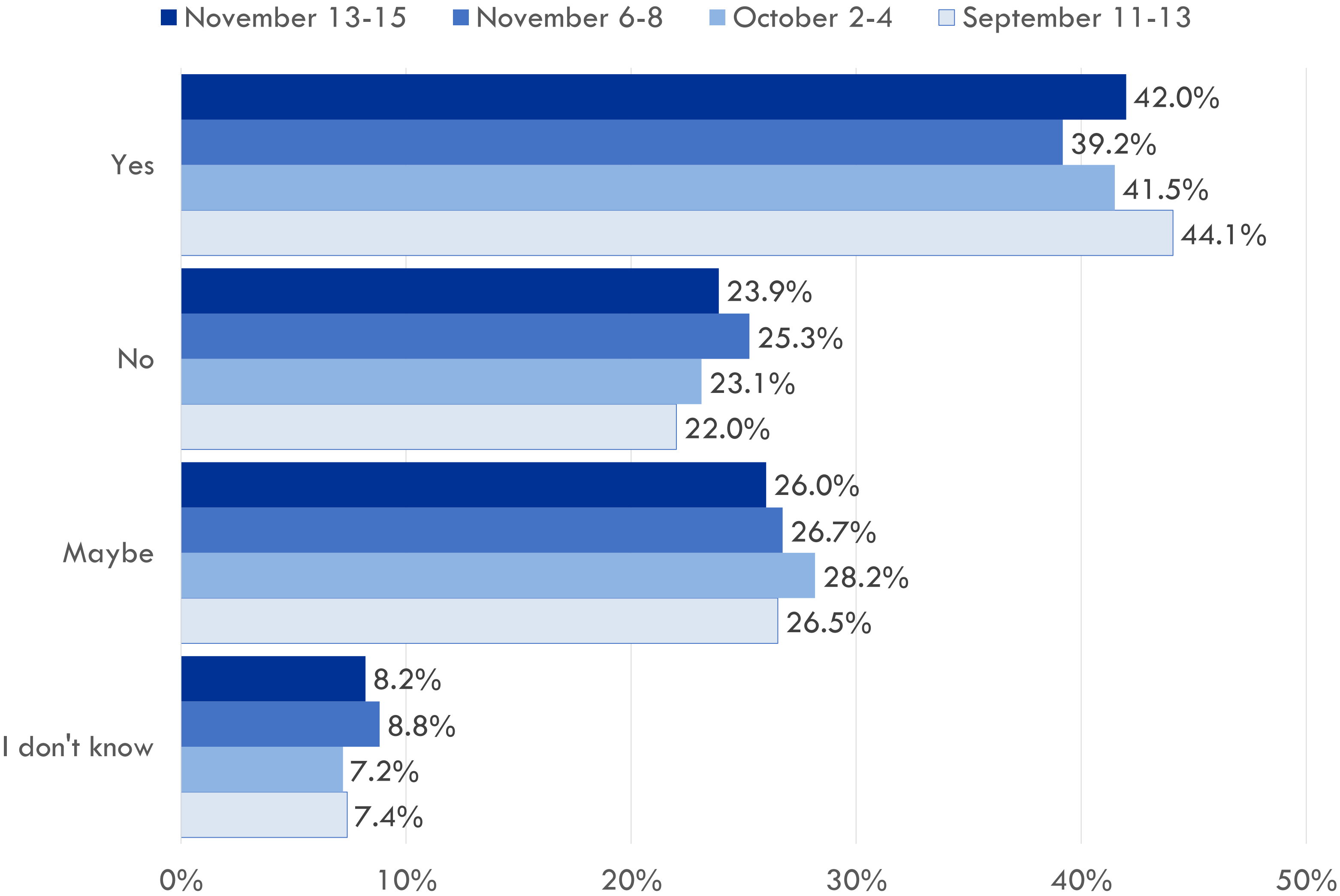


WILL TRAVELERS TAKE A VACCINE

Question: If a COVID-19 vaccine is developed later this year (or early next year) and approved for use, would you take it?

(Assume the vaccine is 75% effective and has mild to moderate side effects)

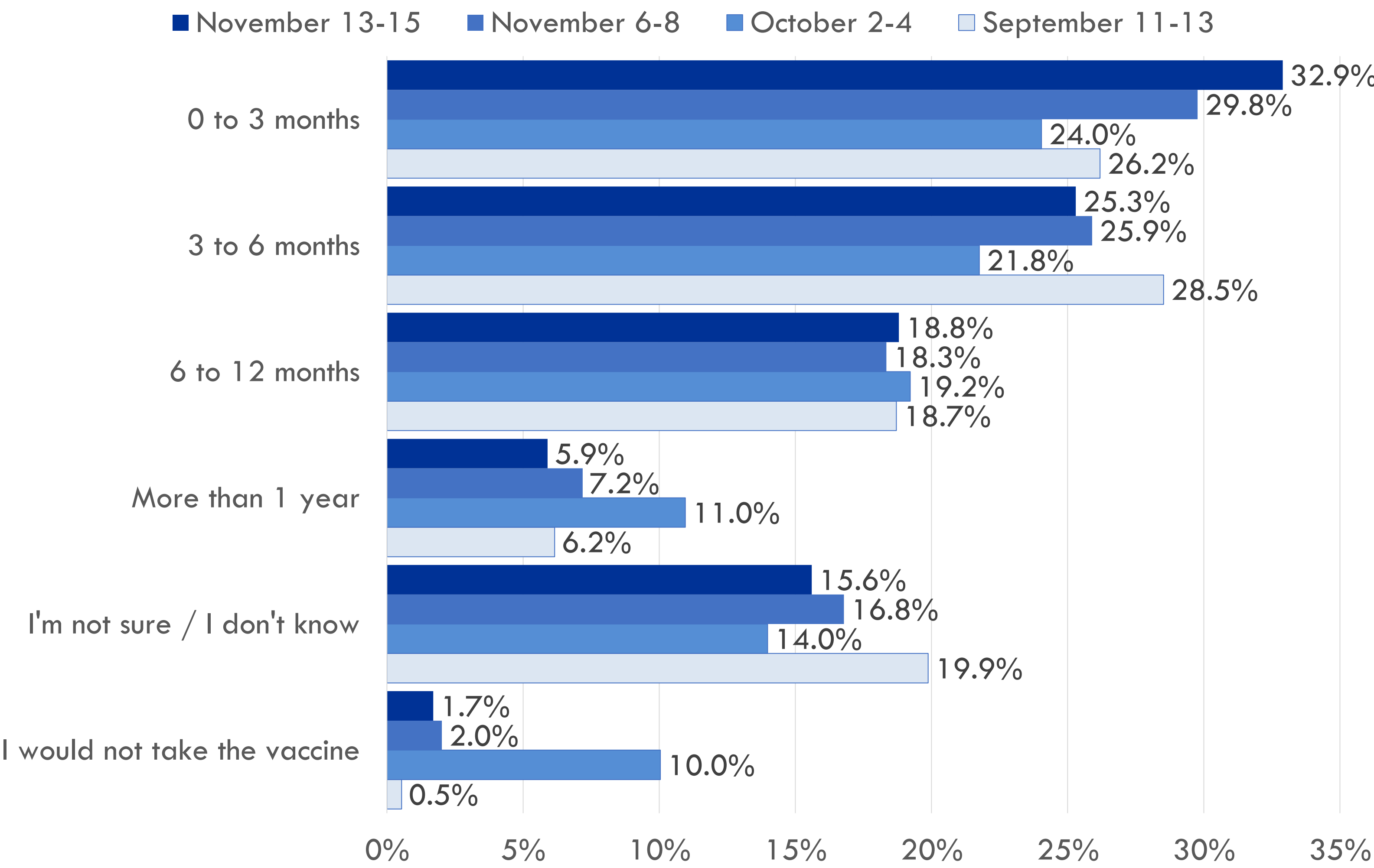
(Base: Wave 27, 30 and 35-36 data. All respondents, 1,205, 1,203, 1,205 and 1,206 completed surveys.)



HOW LONG BEFORE TAKING A VACCINE

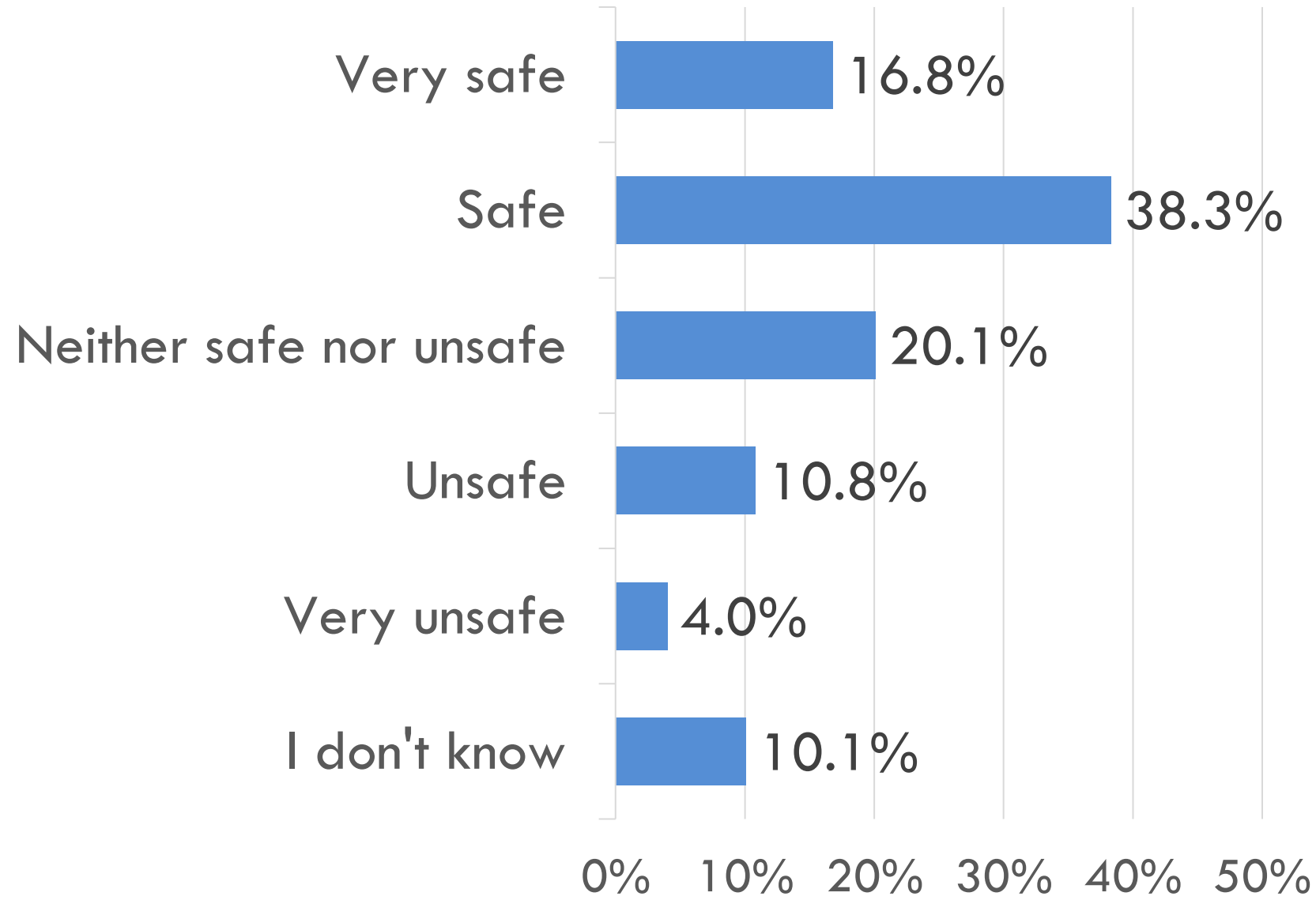
Question: How long would you prefer to wait before taking the vaccine? (Select one)

(Base: Wave 27, 30 and 35-36 data.
Respondents who will or maybe take the vaccine,
946, 1,203, 909 and 952 completed surveys.)



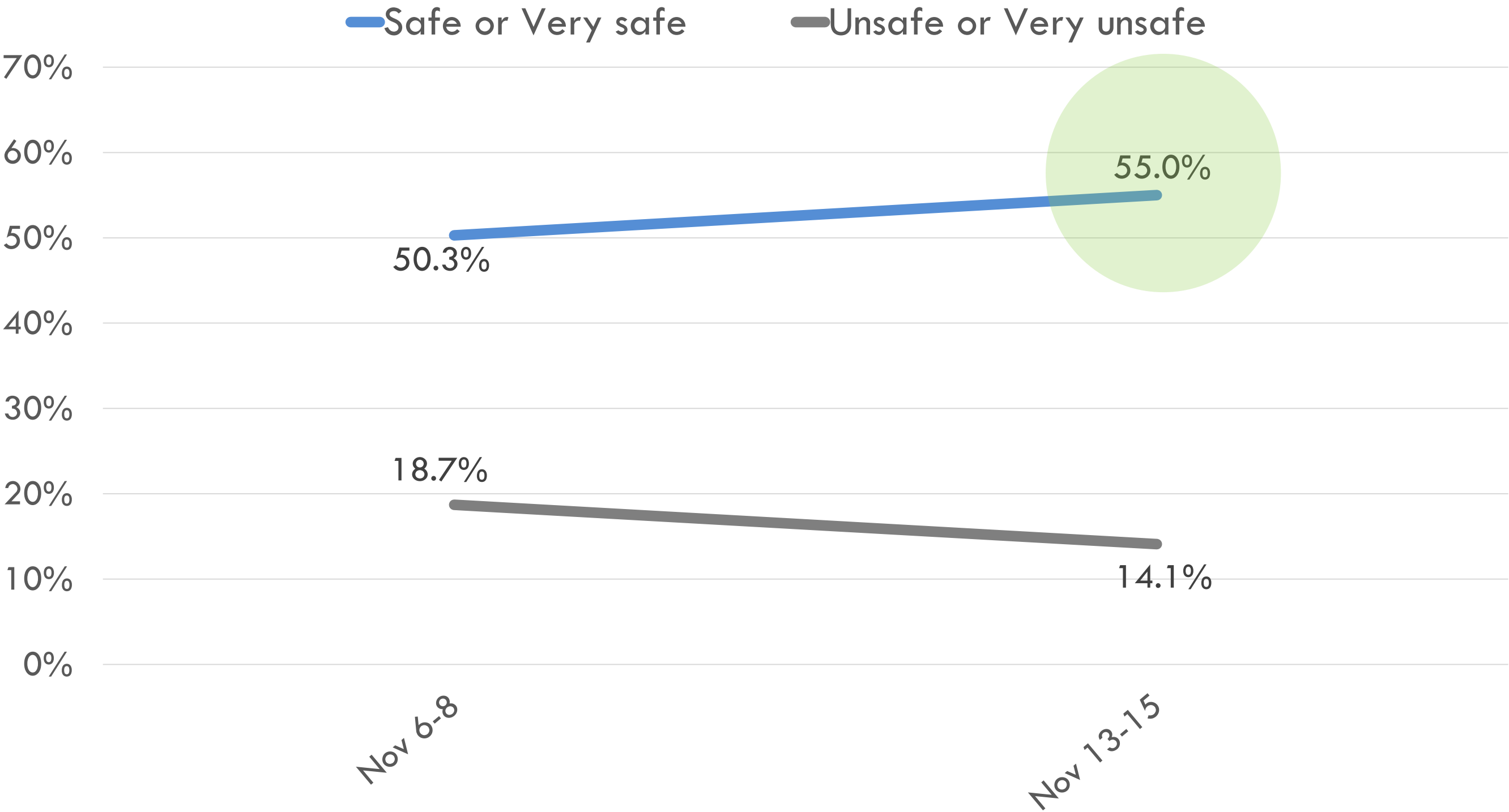
SAFETY OF COVID-19 VACCINES

Question: How safe do you expect a COVID-19 vaccine will ultimately be? (Select one)



(Base: Wave 35-36 data. All respondents, 1,205 and 1,206 completed surveys.)

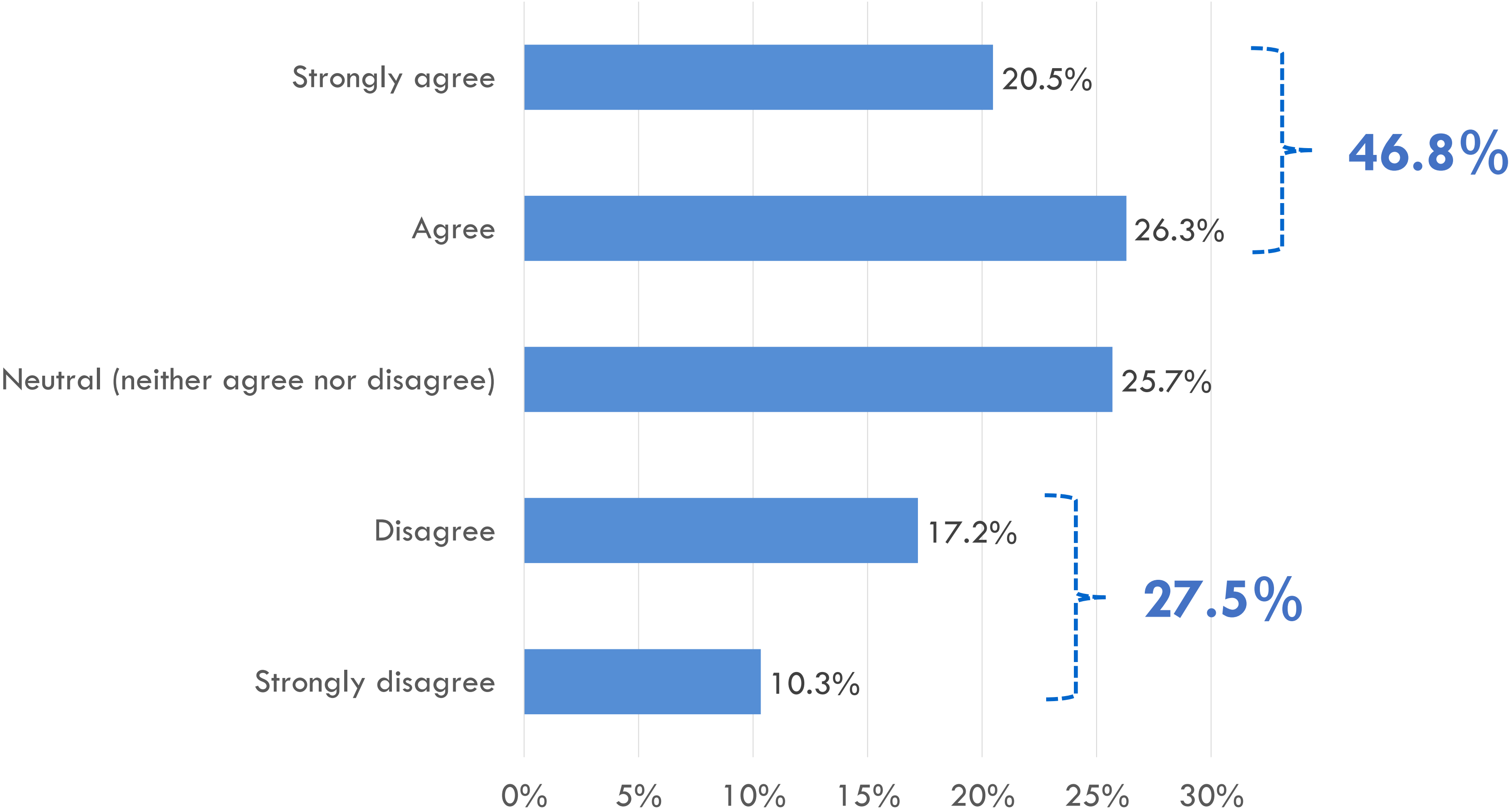
Historical data



TRAVEL GUILT

Question: I would feel guilty traveling right now.

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

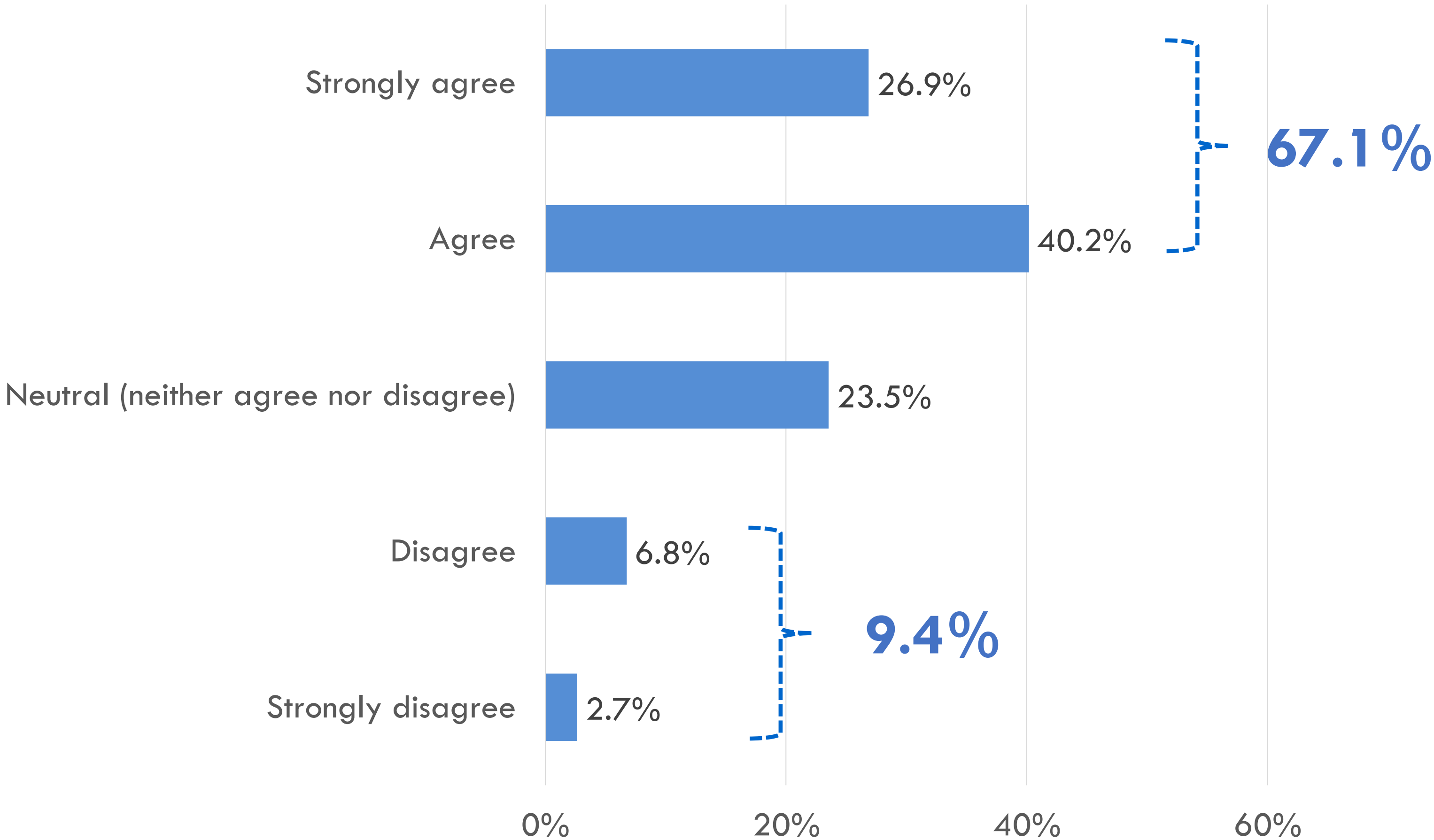


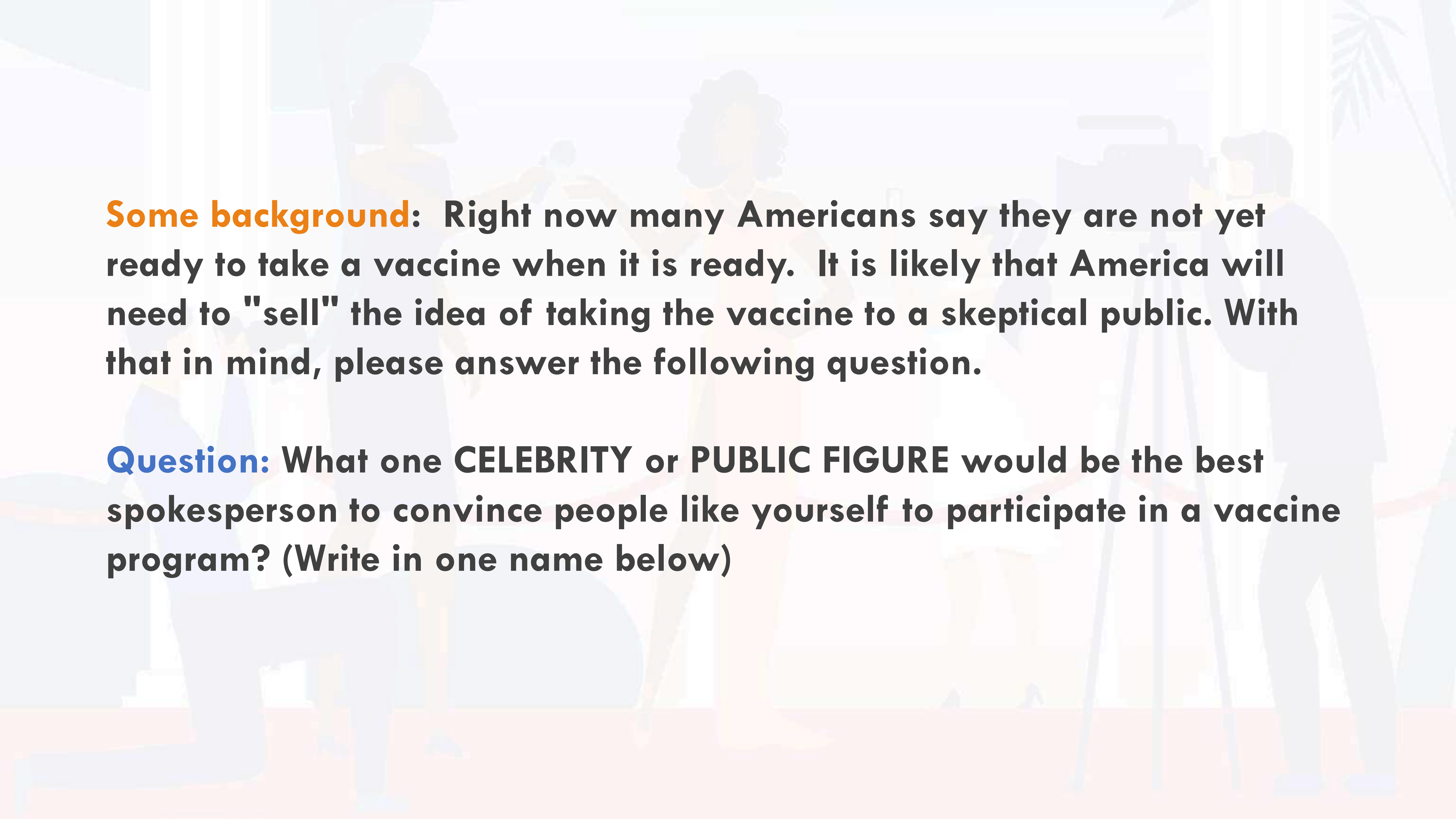
VACCINE'S EFFECT ON TRAVEL GUILT

How much do you agree with the following statement?

Statement: If an effective coronavirus vaccine was made available to the public, I think I would feel less guilty traveling.

(Base: Wave 36 data. Respondents who feel guilty traveling right now, 578 completed surveys. Data collected Nov 13-15, 2020)

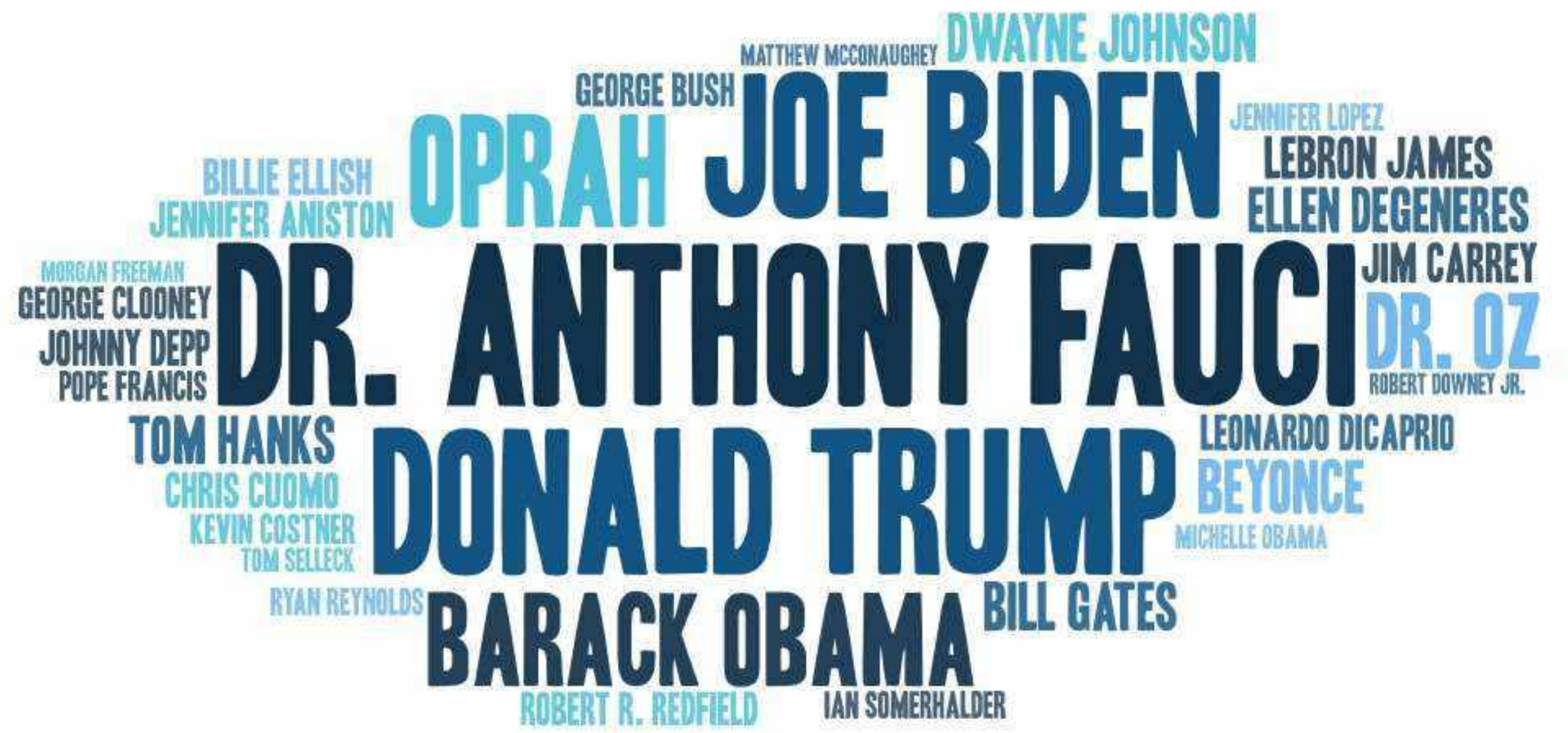




Some background: Right now many Americans say they are not yet ready to take a vaccine when it is ready. It is likely that America will need to "sell" the idea of taking the vaccine to a skeptical public. With that in mind, please answer the following question.

Question: What one **CELEBRITY** or **PUBLIC FIGURE** would be the best spokesperson to convince people like yourself to participate in a vaccine program? (Write in one name below)

BEST SPOKESPERSON FOR VACCINE PROGRAM



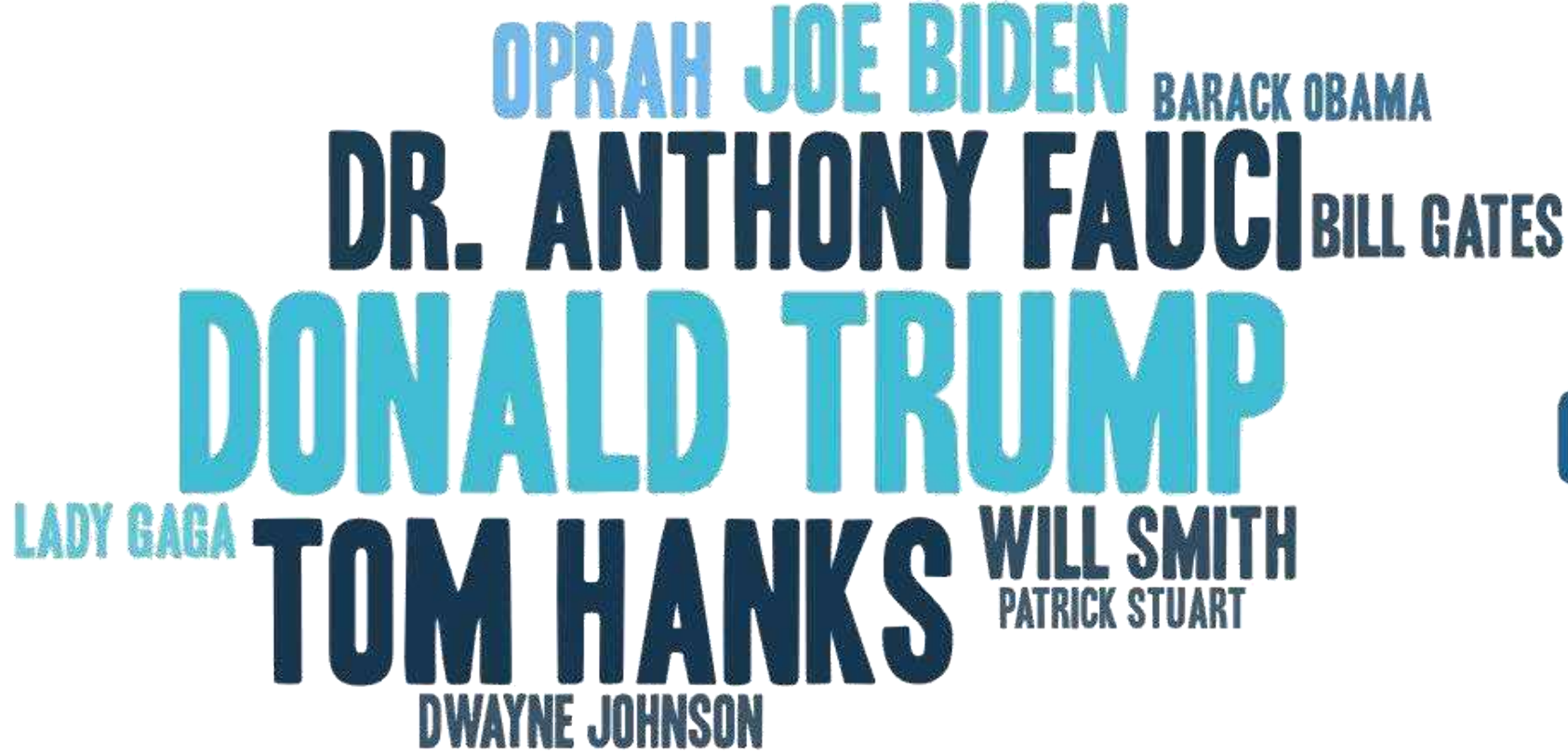
(Base: Wave 36 data. All respondents, 337 completed surveys. Data collected Nov 13-15, 2020)

BEST SPOKESPERSON FOR VACCINE PROGRAM BY GENERATION

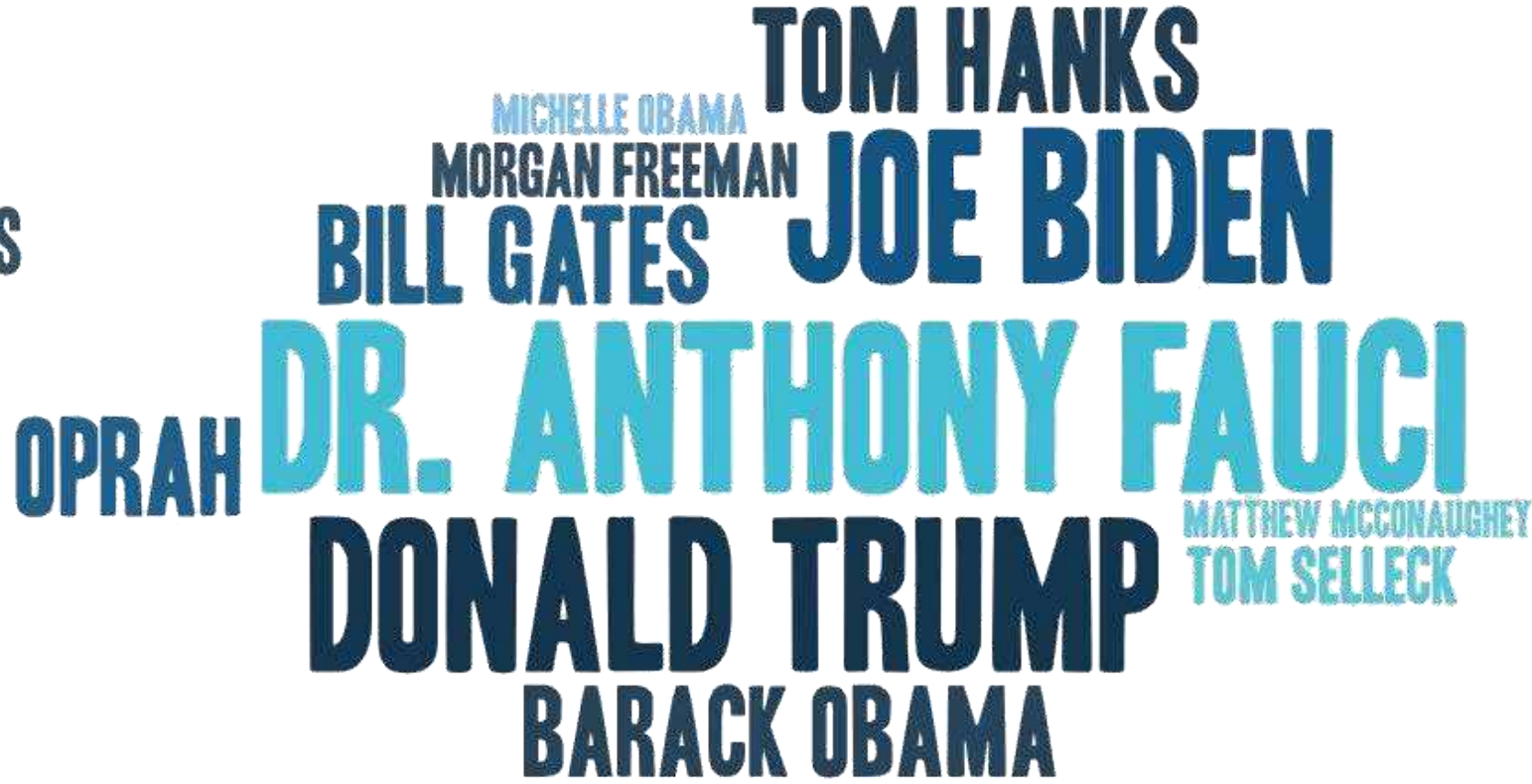
MILLENNIALS



GEN X



BABY BOOMERS





KEY TAKEAWAYS

- There continue to be positive indicators for travel's future, including American travelers' personal financial concerns at a pandemic low-point, and stability in the perception of travel and leisure activities as unsafe and a travel readiness mindset
- Travel has happened during the pandemic and continues to be planned

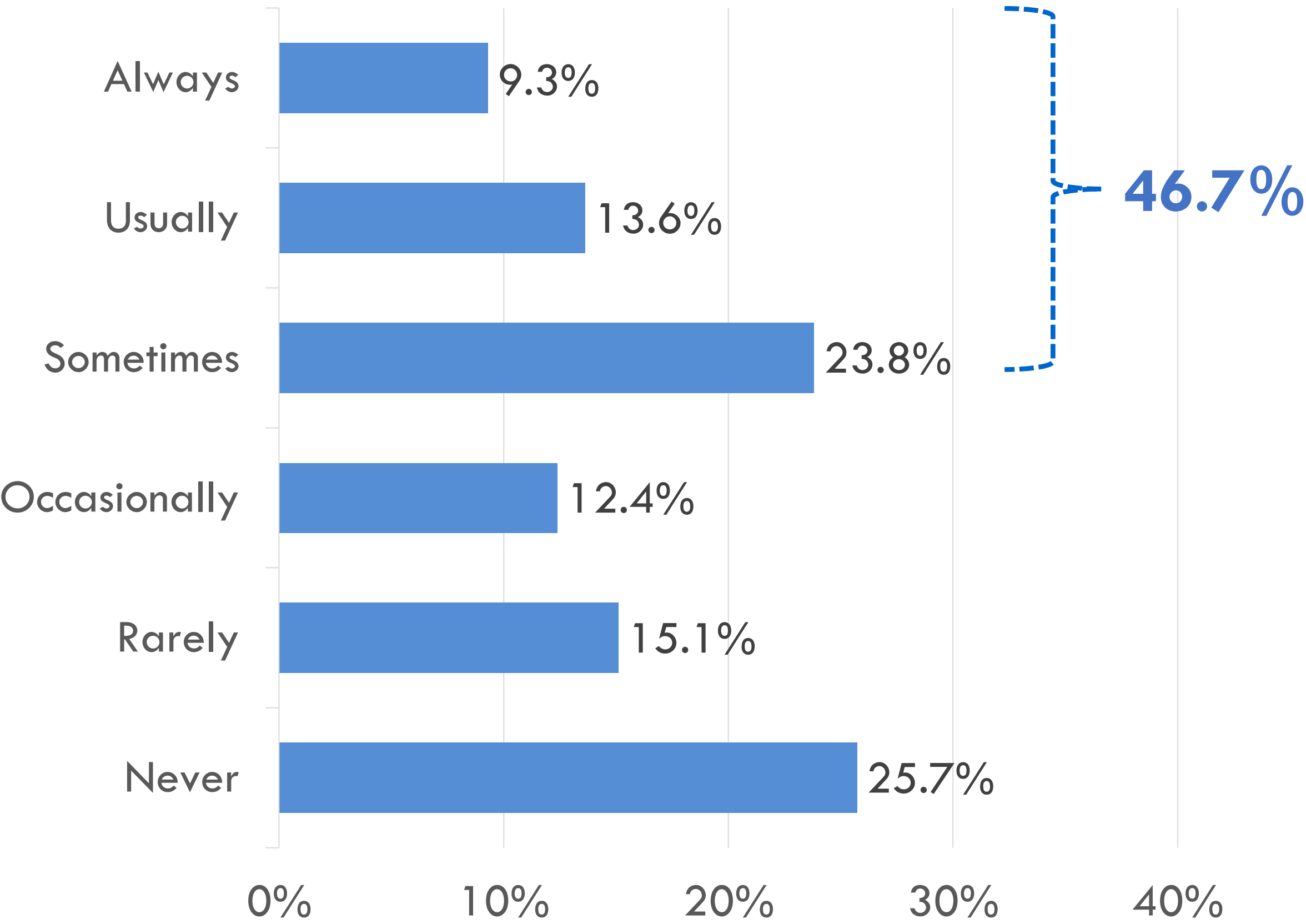
A man and a woman are smiling and standing together in what appears to be a cafe or a small shop. They are both wearing dark-colored aprons over their casual clothing. The man is on the right, wearing a grey hoodie, and the woman is on the left, wearing a light-colored button-down shirt. They are both looking directly at the camera. The background is slightly blurred, showing shelves with various items and a brick wall. The text "CONSCIOUS TRAVEL" is overlaid in the center of the image in a bold, white, sans-serif font.

CONSCIOUS TRAVEL

SEARCHING FOR MINORITY-OWNED LOCAL BUSINESSES

Question: When planning your trips, how often do you actively search for **MINORITY-OWNED LOCAL BUSINESSES** in the destinations you're visiting?

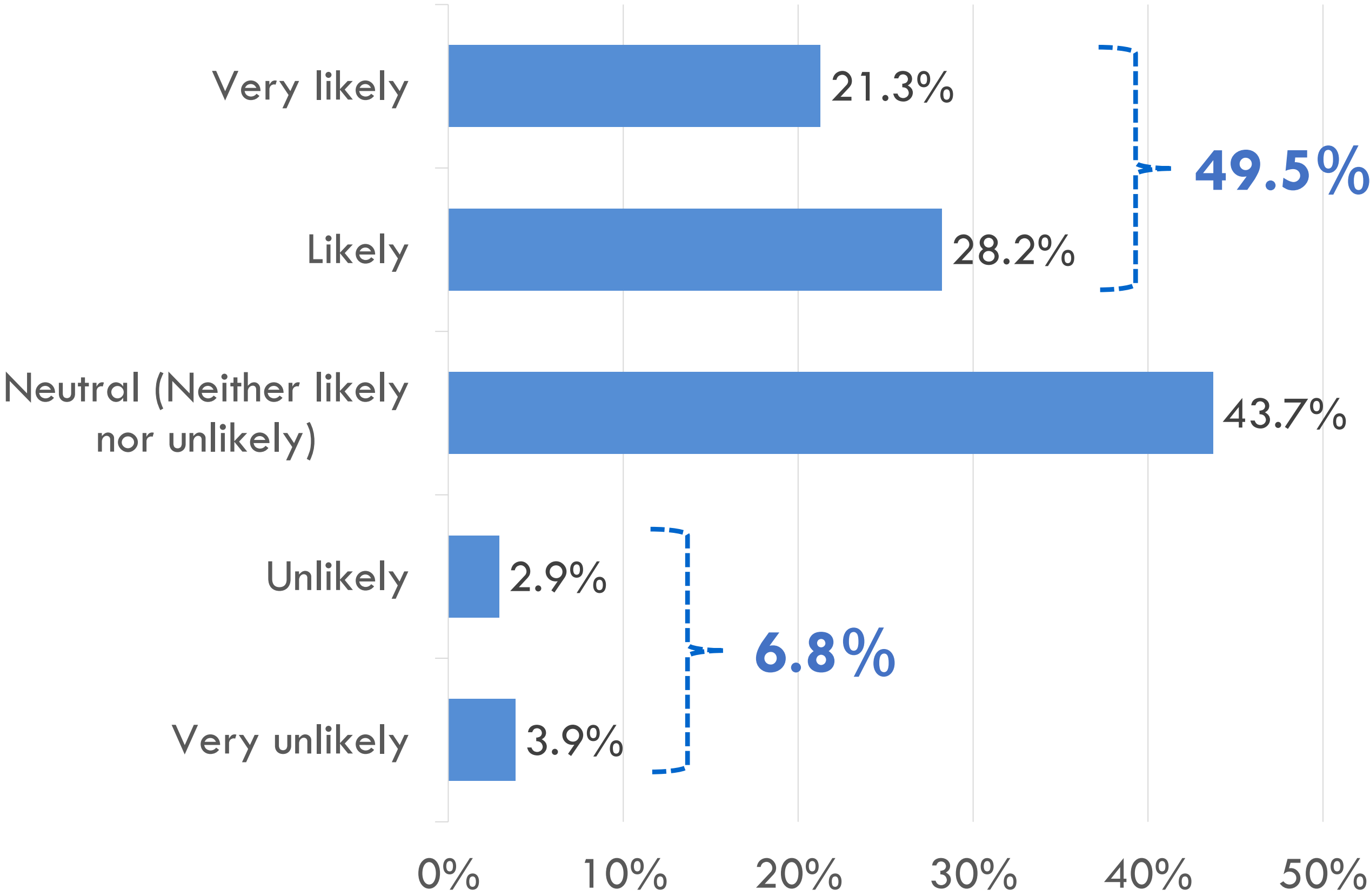
(Base: Wave 36 data. All respondents, 1,189 completed surveys. Data collected Nov 13-15, 2020)



LIKELIHOOD TO SUPPORT MINORITY-OWNED BUSINESSES

Question: On your next trip, how likely are you to support minority-owned businesses? (Select one)

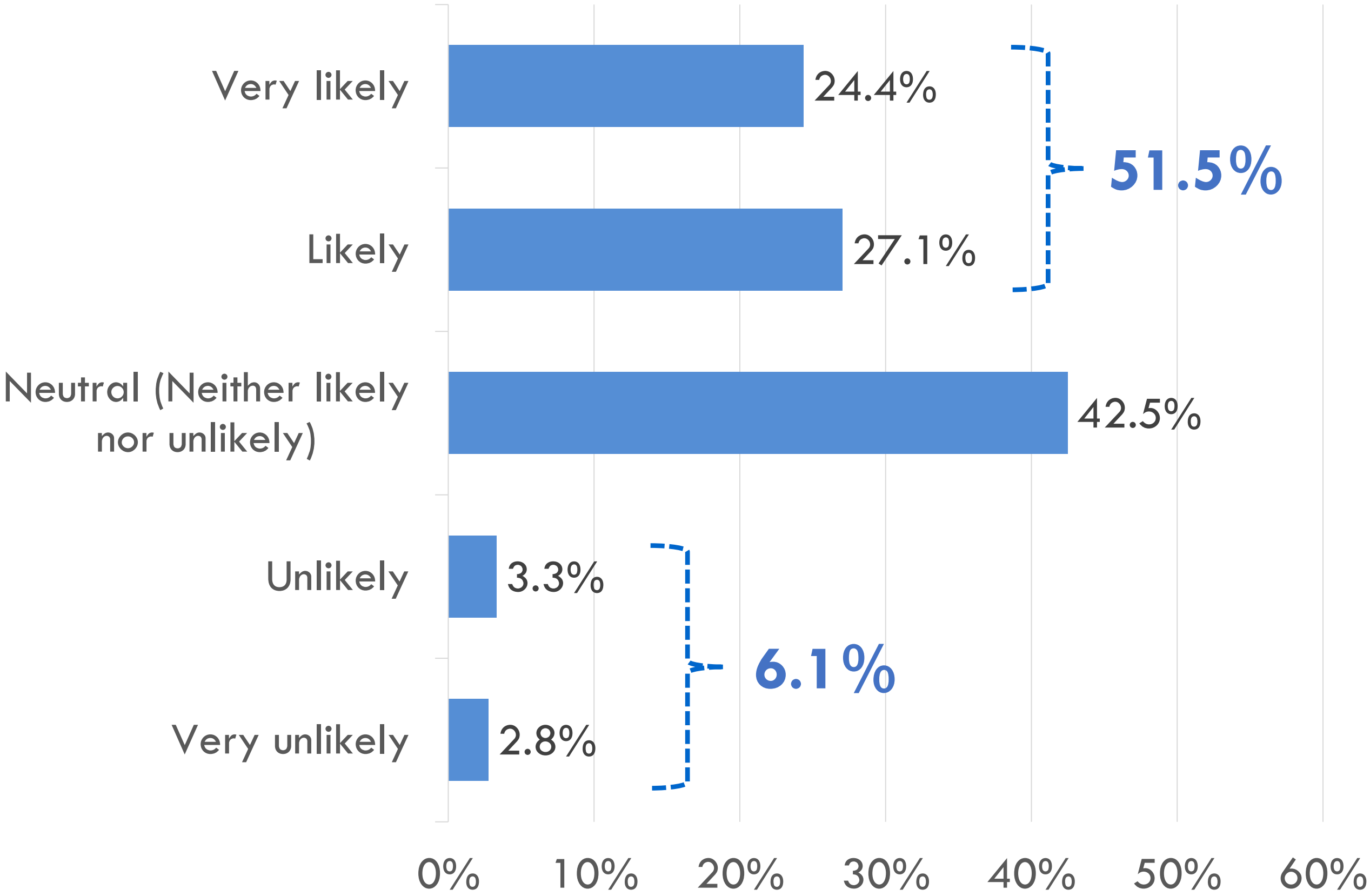
(Base: Wave 36 data. All respondents, 1,170 completed surveys. Data collected Nov 13-15, 2020)



LIKELIHOOD TO SUPPORT BUSINESSES THAT MAKE A POSITIVE SOCIETAL IMPACT

Question: On your next trip, how likely are you to support businesses that you believe make a positive societal impact? (Select one)

(Base: Wave 36 data. All respondents, 1,184 completed surveys. Data collected Nov 13-15, 2020)



**Do you have a survey topic you
want us to explore?**

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**



Coming soon!

THE STATE OF THE INTERNATIONAL TRAVELER

15-minute presentations for your board and stakeholders

info@destinationanalysts.com

