

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings
November 24, 2020

Destination  Analysts



Independent Unbiased Research





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

DestinationAnalysts.com/covid-webinars

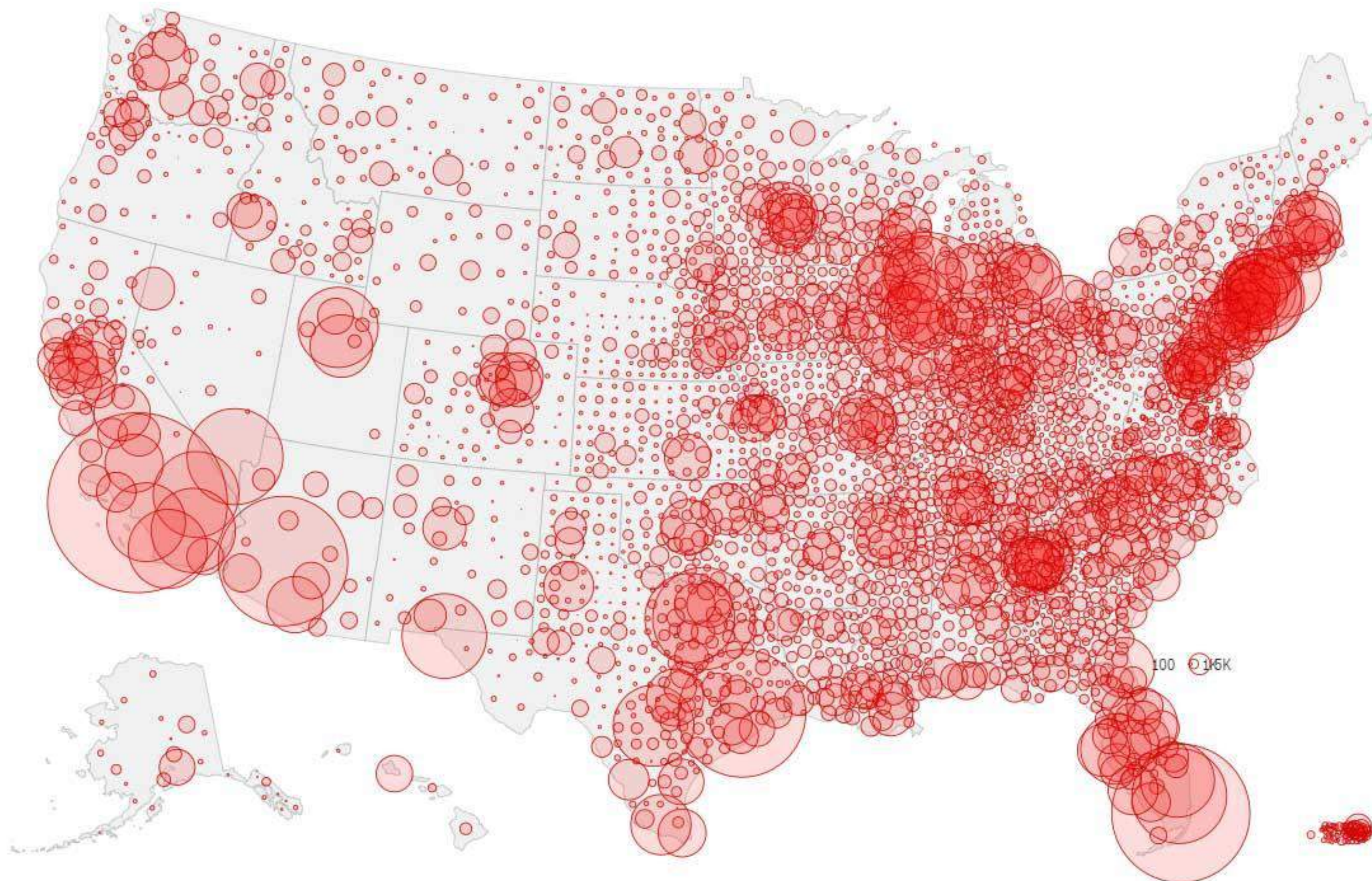
RESEARCH OVERVIEW & METHODOLOGY

- **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 37 data (fielded November 18th-20th) 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





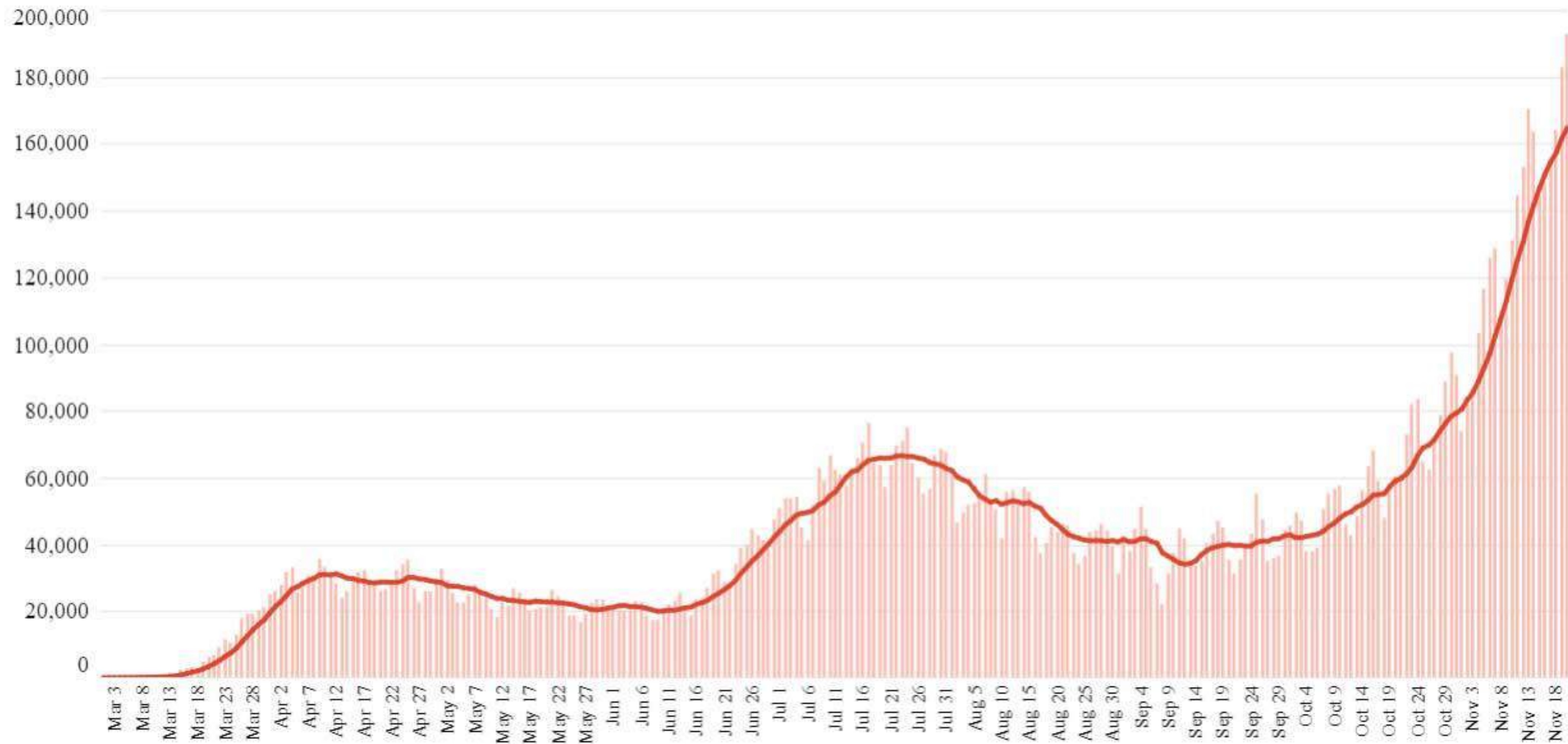


Last updated: November 21, 2020 at 5:45 p.m. ET
Source: Johns Hopkins University Center for Systems Science and Engineering

Cases	Deaths
12,044,934	255,541

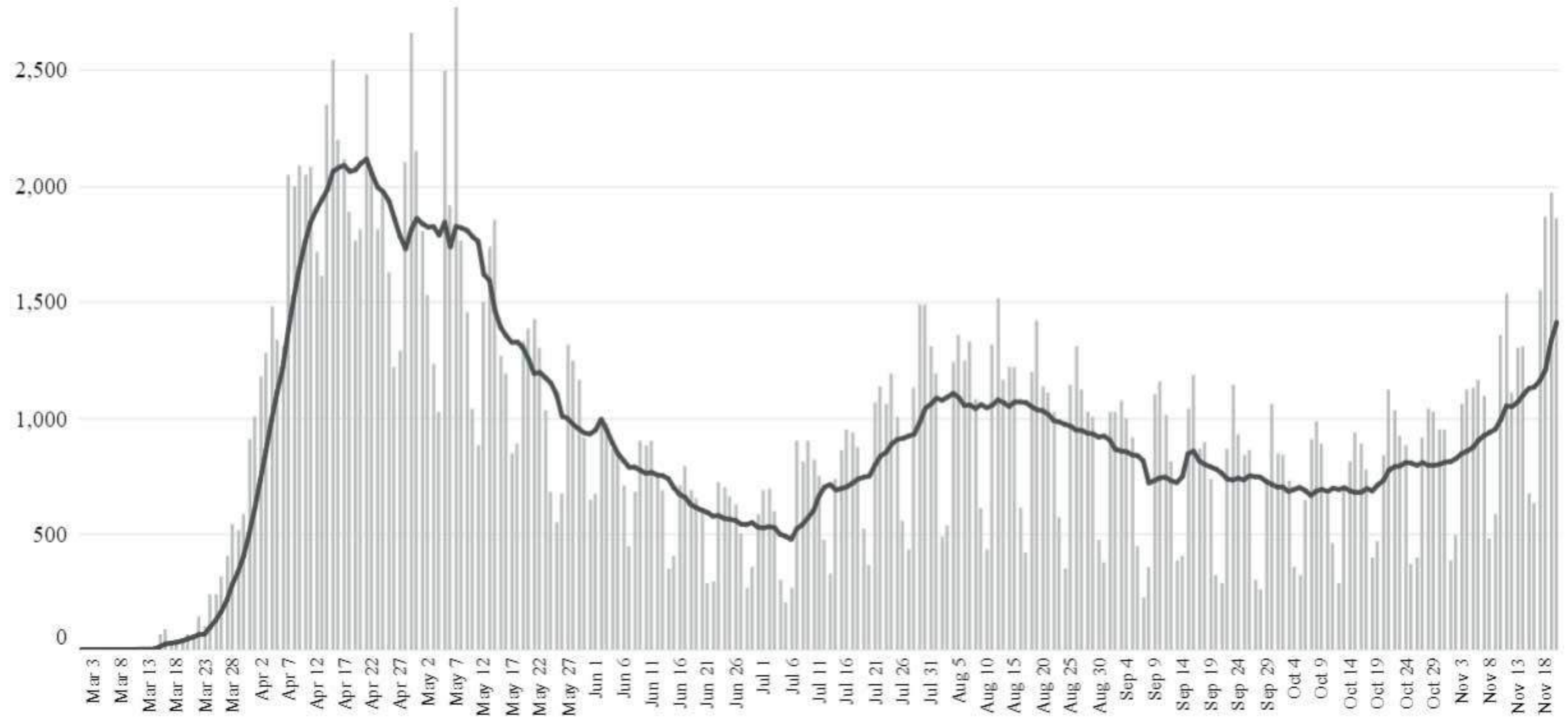
US DAILY CASES. 7-DAY AVERAGE LINE

Mar 1 Nov 20



US DAILY DEATHS. 7-DAY AVERAGE LINE

Mar 1 Nov 20



Daily California coronavirus cases triple as pandemic dramatically worsens

Rong-Gong Lin II

Sun, November 22, 2020, 7:29 AM PST - 9 min read



A pedestrian walks past a sign in San Francisco on Saturday. (Jeff Chiu / Associated Press)

California's average daily number of coronavirus cases has tripled in the last month, a Times analysis has found, as pandemic conditions deteriorated dramatically around the state.

The coronavirus is now infecting more Californians daily than at any previous point in the COVID-19 pandemic, raising concerns about a new peak in coronavirus-related deaths by Christmas.

As of Saturday night, California was averaging more than 11,500 new coronavirus cases a day over the last seven days, more than triple the number a month earlier, on Oct. 21, which was nearly 3,200, according to a Times analysis.

Even during the summertime surge, which led to the season with California's worst COVID-19 death toll, the average daily number of coronavirus cases over a seven-day period never exceeded 10,000.

COVID-19 hospitalizations have doubled in the last month, the analysis found. And COVID-19 deaths have suddenly begun to climb in recent days. In the last week, an average of 65 Californian deaths have been reported daily, a more than 50% increase from two weeks ago, when 43 fatalities were reported daily on average.

CORONAVIRUS CALIFORNIA

Bay Area businesses adjust to new California COVID-19 related curfew, some police departments won't enforce it



By Luz Pena and Cornell Barnard

Sunday, November 22, 2020 12:19AM



EMBED <>

MORE VIDEOS ▶

A majority of Californians, including six Bay Area counties are under a curfew beginning Saturday as surging coronavirus cases threaten to swamp hospitals, and the state's largest county warned that an even more drastic lockdown could be imminent.

SAN FRANCISCO (KGO) -- A majority of Californians, including six Bay Area counties are under a nighttime curfew beginning Saturday as surging [novel coronavirus](#) cases threaten to swamp health care systems, and the state's largest county warned that an even more drastic lockdown could be imminent.

The newest restrictions require people to stay home from 10 p.m. to 5 a.m. unless they are responding to an emergency, shopping for groceries, picking up takeout or walking their dogs. The curfew will last until Dec. 21, with a possible extension if rapidly worsening trends don't improve.

RELATED: [Gov. Newsom orders curfew for most California counties](#)

Travelers ignore guidance to stay home, pack airports for holiday travel

By [Melissa Klein](#)

November 21, 2020 | 6:23pm | Updated



Sign up for our [special edition newsletter](#) to get a daily update on the coronavirus pandemic.

Air travelers are aghast at the number of people crowding into airports in defiance of recommendations to stay home for the Thanksgiving holiday.

Dr. Dena Grayson, a doctor and researcher who describes herself as an Ebola expert, [tweeted video](#) Saturday taken in Arizona of a jammed Sky Harbor Airport in Phoenix.

"New #coronavirus cases will SKYROCKET in December, followed by hospitalizations, then deaths," wrote Grayson, who in 2016 ran unsuccessfully for Congress in Florida.

Lines to get tested for coronavirus are growing long ahead of Thanksgiving and amid rising cases

By [Jason Hanna, CNN](#)

Updated 9:58 AM ET, Sat November 21, 2020



Motorists wait in line at a drive-up Covid-19 test site last week in Aurora, Illinois.

(CNN) — As US coronavirus cases [soar](#) and people seek tests ahead of Thanksgiving travel, long lines are forming outside testing sites around the country, appointments are filling up, and commercial labs are warning that their capacities are being stretched.



Related Article: Don't rely on a negative test result to see your family for Thanksgiving

And while the US Centers for Disease Control and Prevention on Thursday recommended [not traveling for Thanksgiving](#) and encouraged people to celebrate in person only with [their own households](#), some health officials have offered competing messages about how - and whether -- people without symptoms should get tested if they insist on gathering for the holiday.

Queues of cars have been forming outside testing sites run by states, counties, health care systems and pharmacies in numerous cities in recent days, including

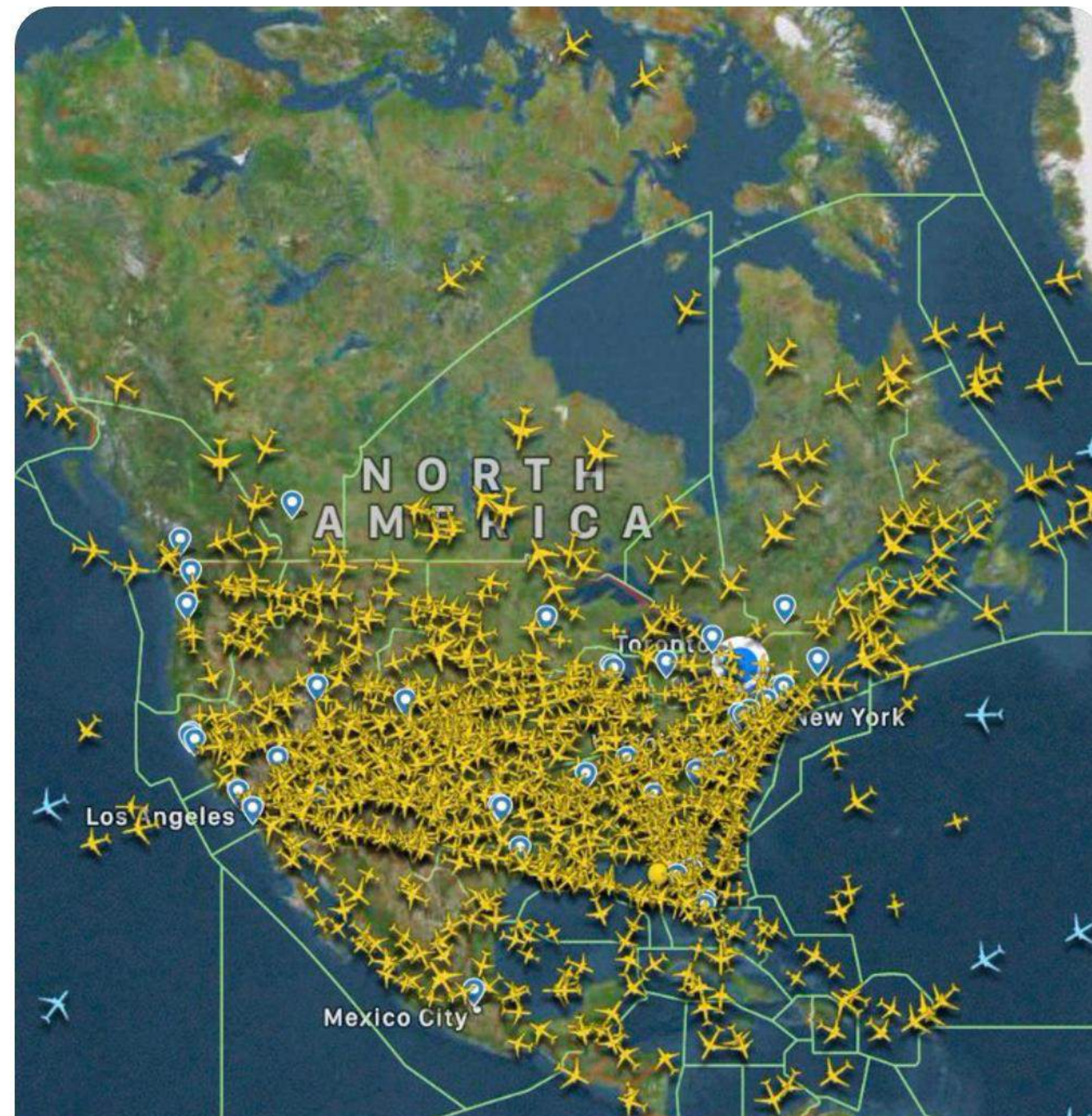


Laura Miers

@LauraMiers



I'm sure it will be fine.



Tweet your reply

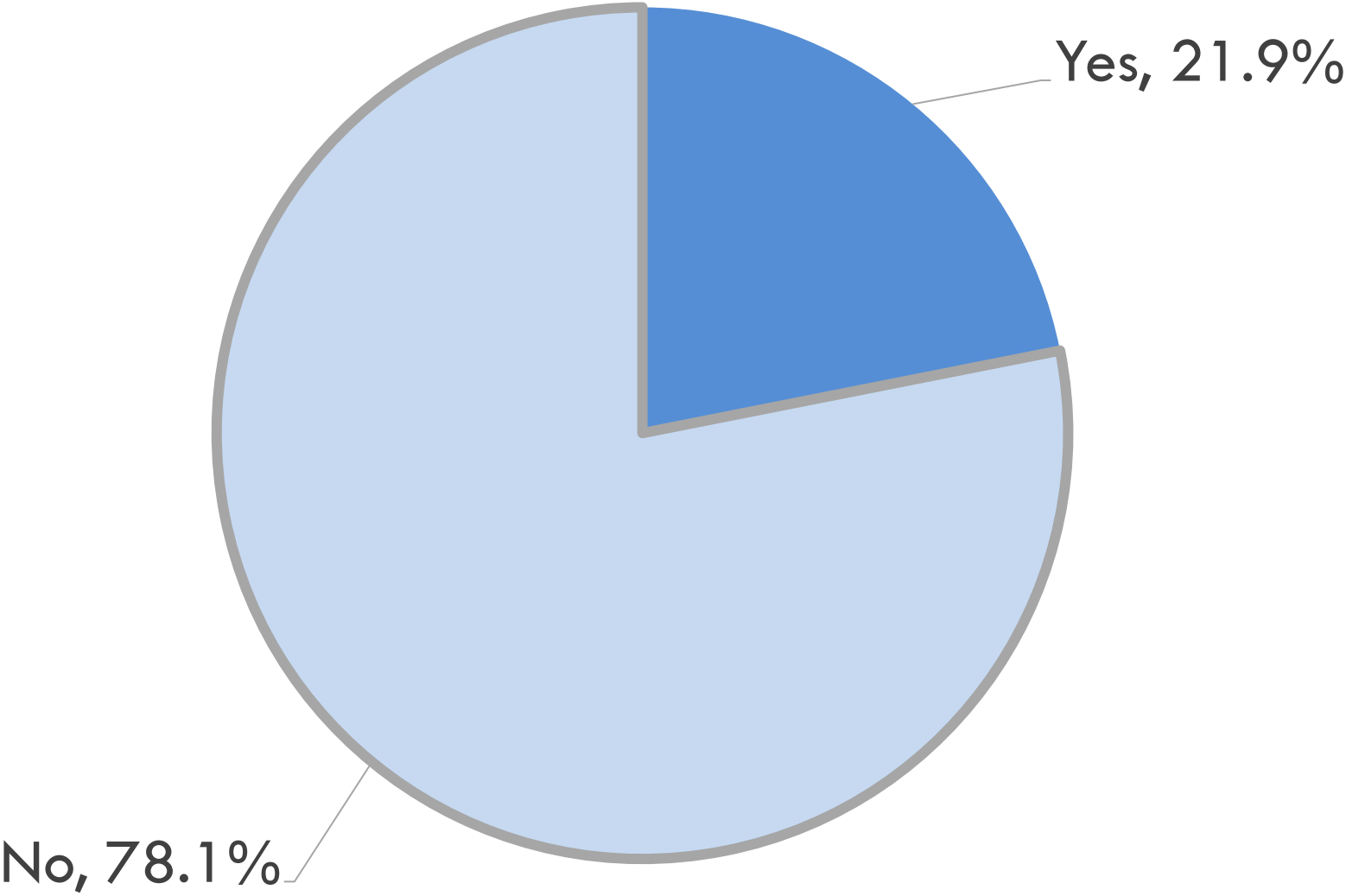


Current Traveler Sentiment

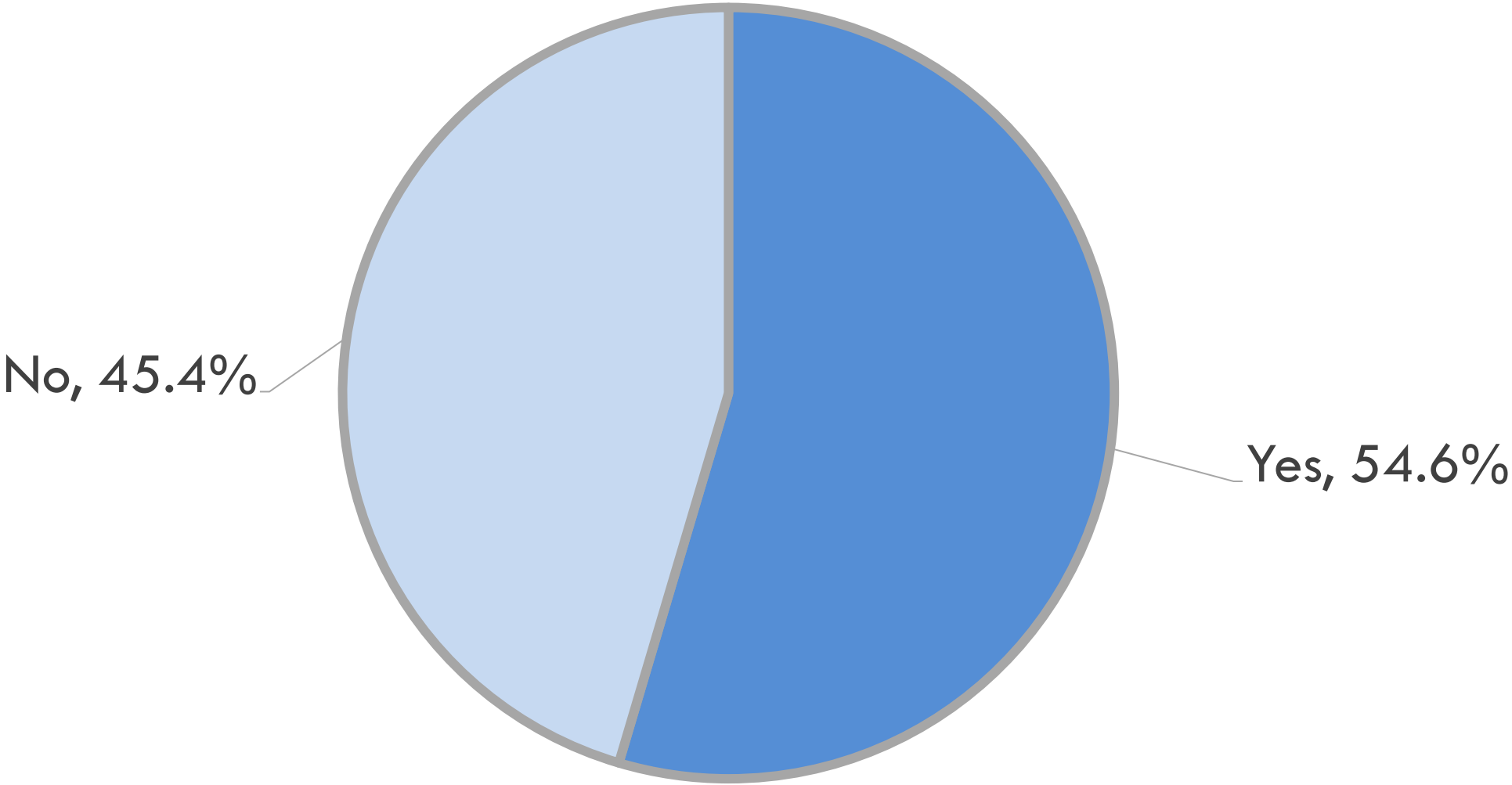


ROAD & AIR TRAVEL DURING THE PANDEMIC

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



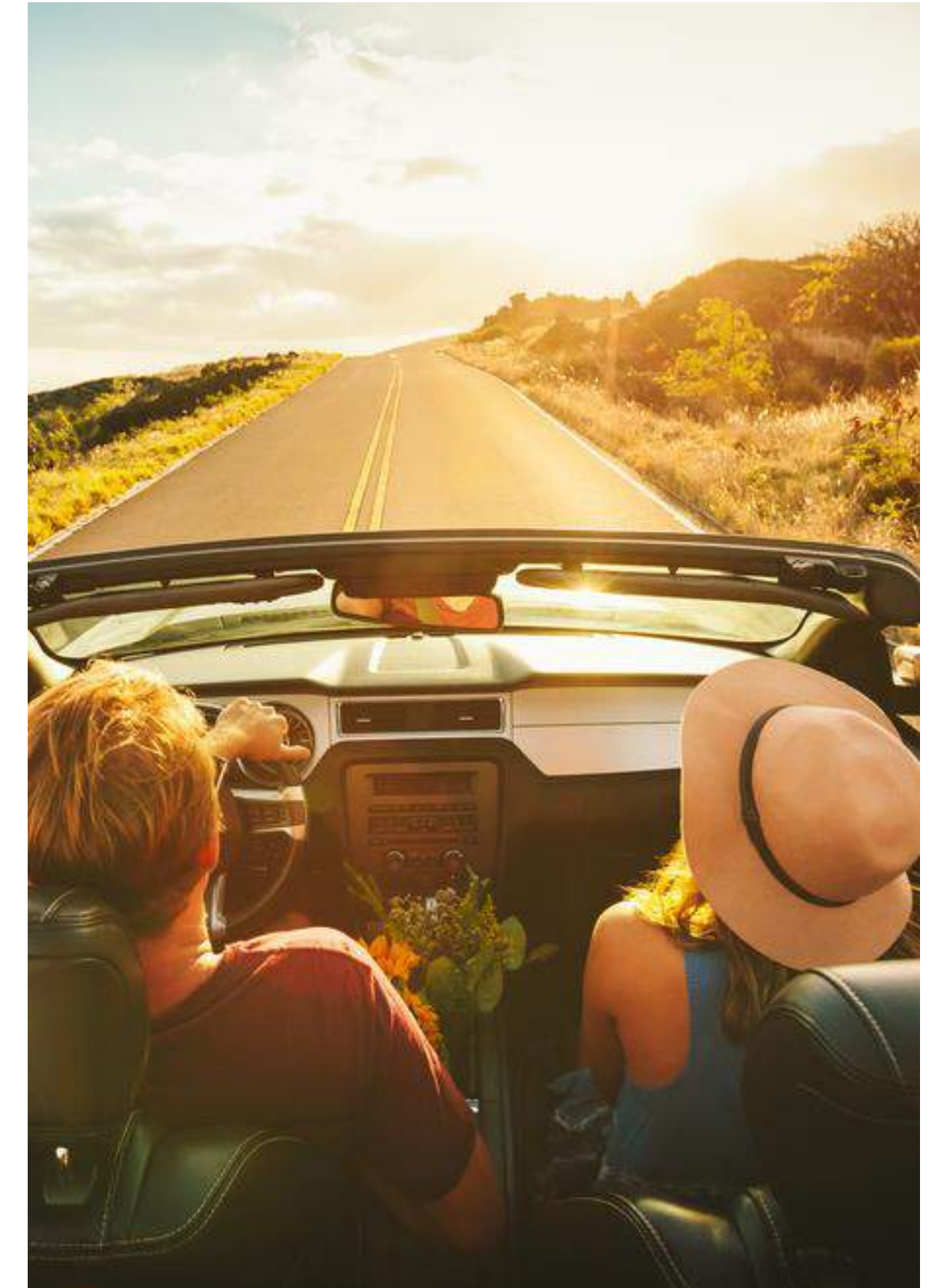
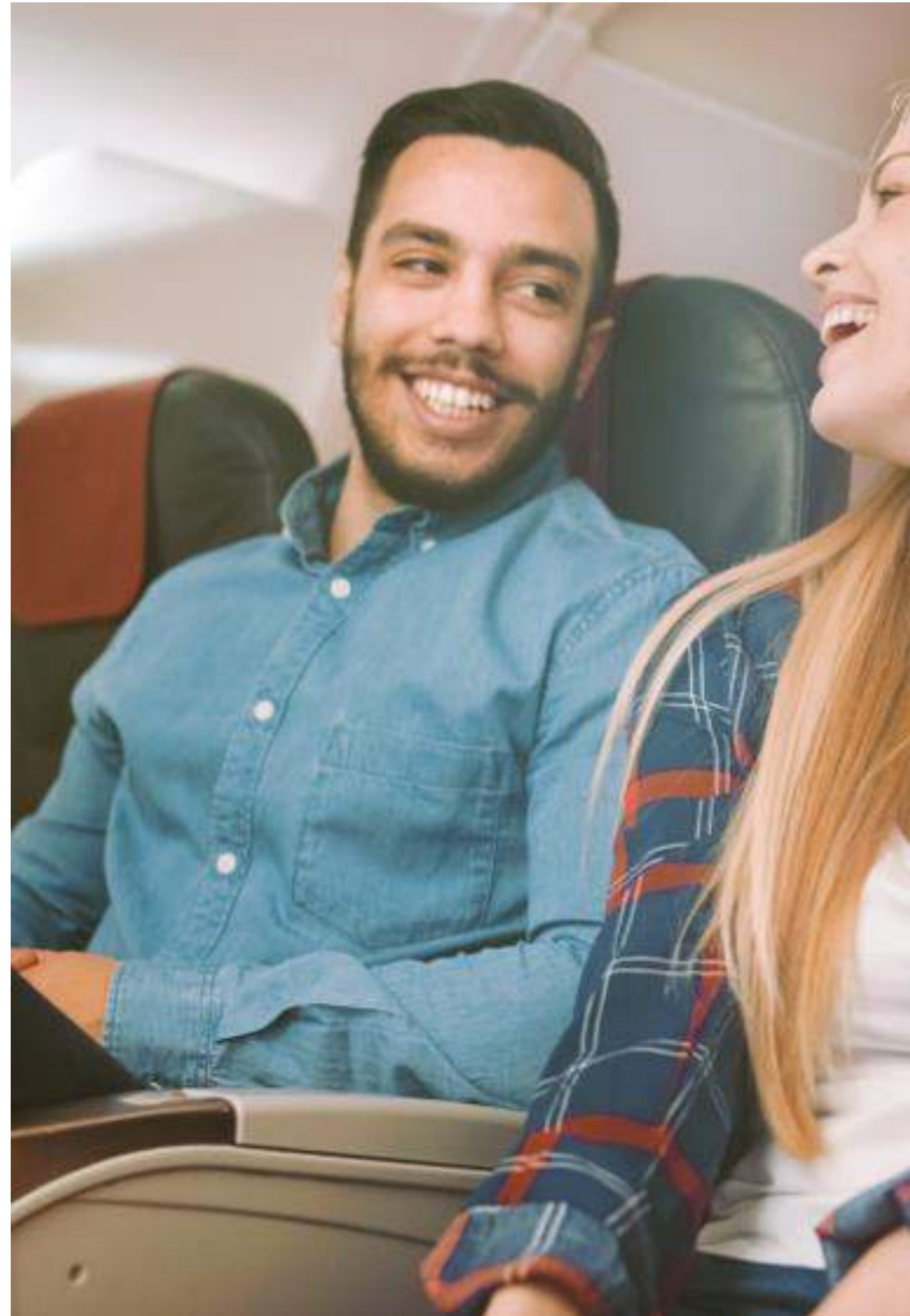
Question: Have you taken any road trips (50 miles or more from your home) since the start of the Coronavirus pandemic (March 2020 to today)?



(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

60.4% took either

Road trip or traveled by commercial airline



WHEN AMERICANS HAVE TRAVEL PLANS AS OF NOVEMBER 22ND

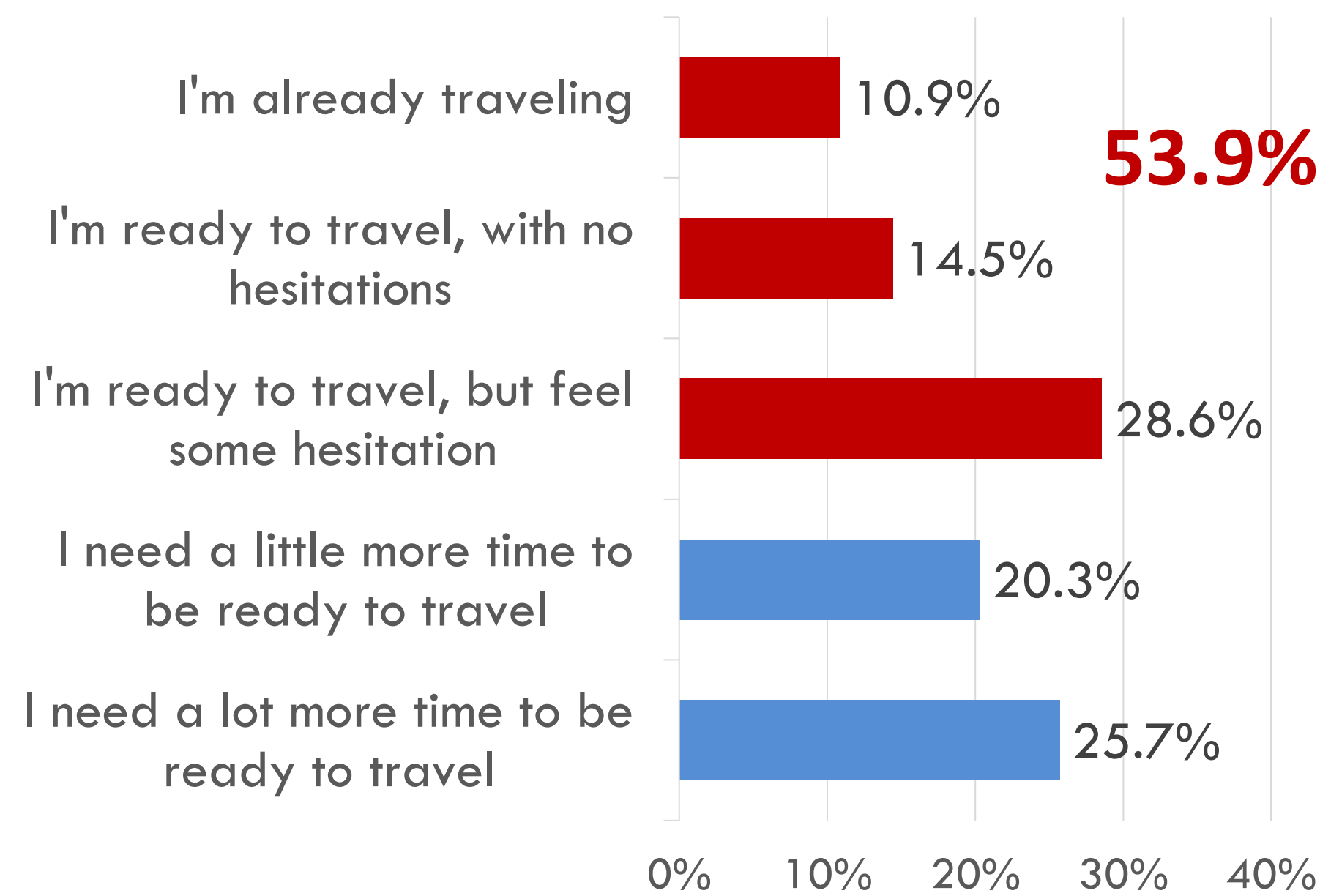


QUESTION: EVEN IF ONLY TENTATIVELY SCHEDULED, IN WHICH MONTHS OF THIS YEAR DO YOU CURRENTLY PLAN TO TAKE ANY LEISURE TRIPS?

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

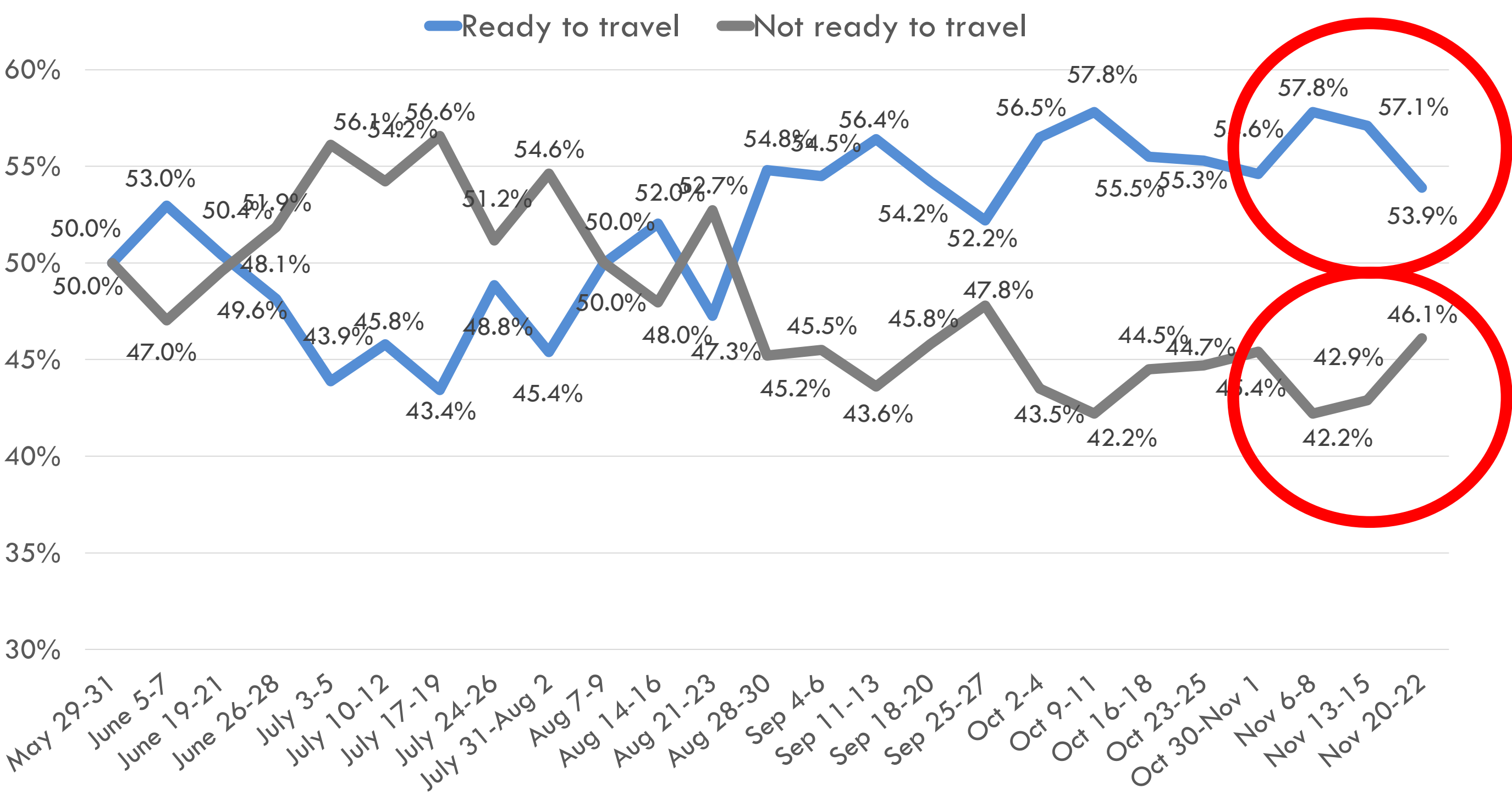
TRAVEL STATE-OF-MIND

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 15-37. 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 and 1,205 completed surveys.

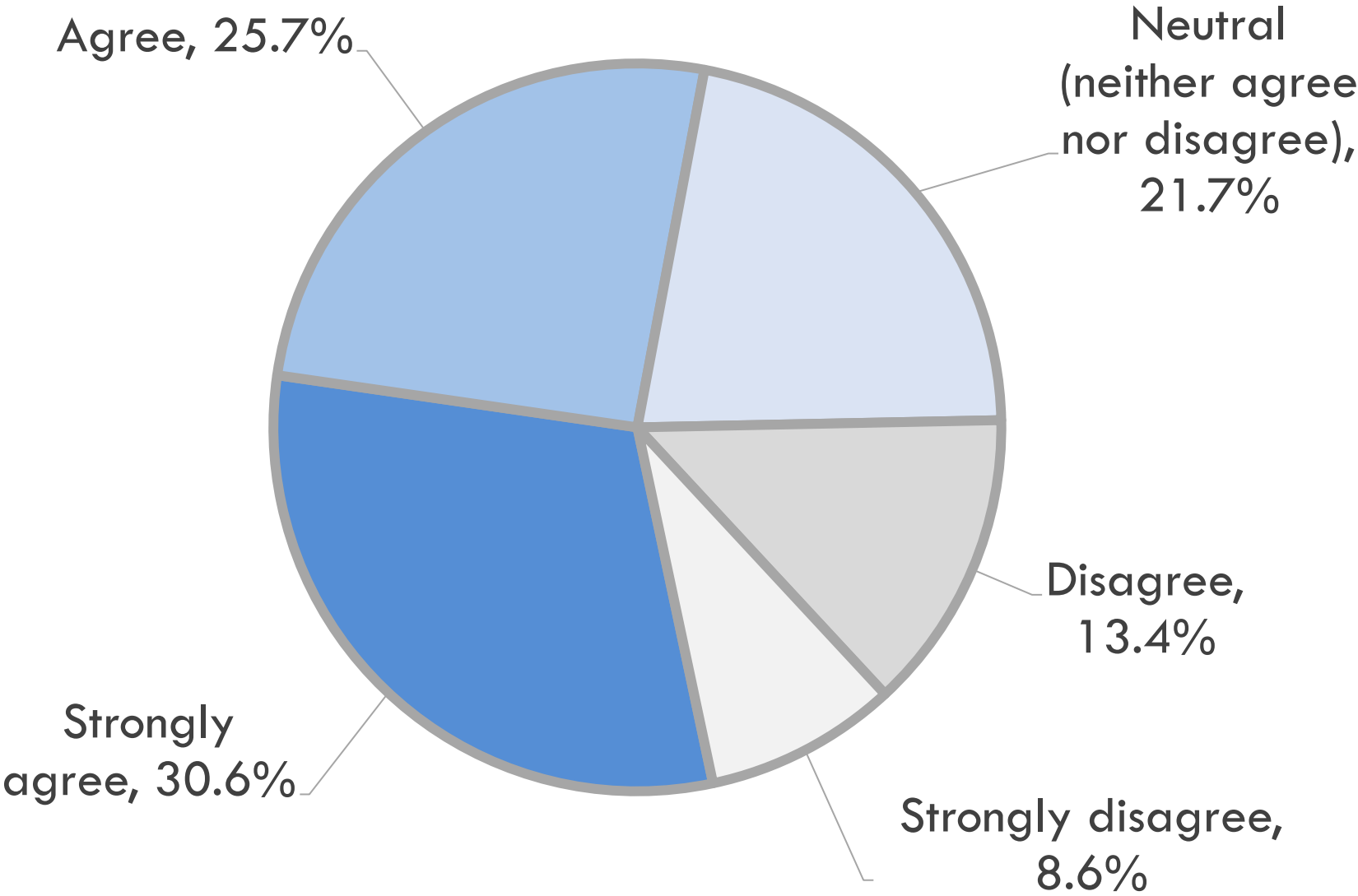
Historical data



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

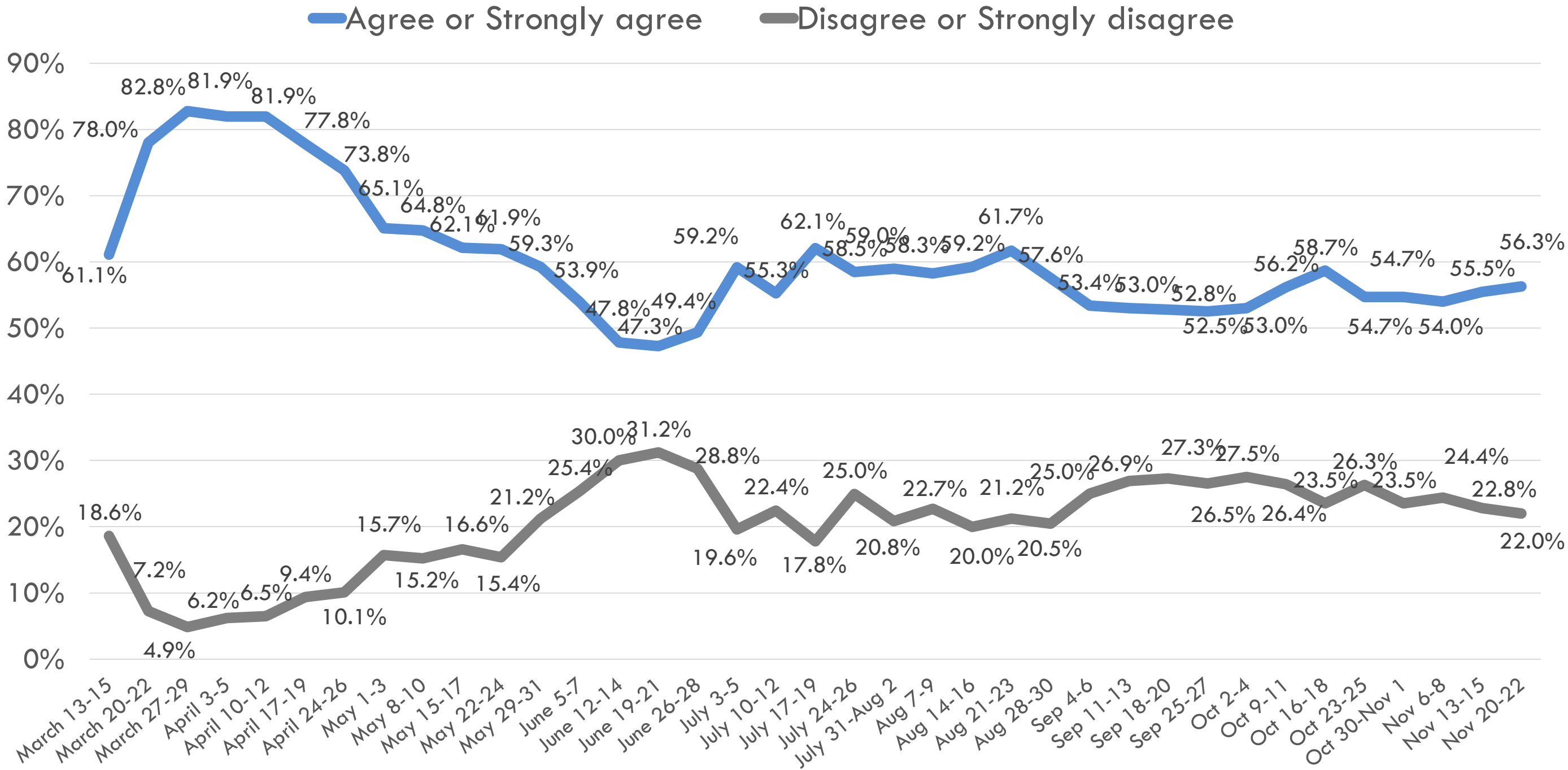
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



(Base: Waves 1-37. 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 and 1,205 completed surveys.

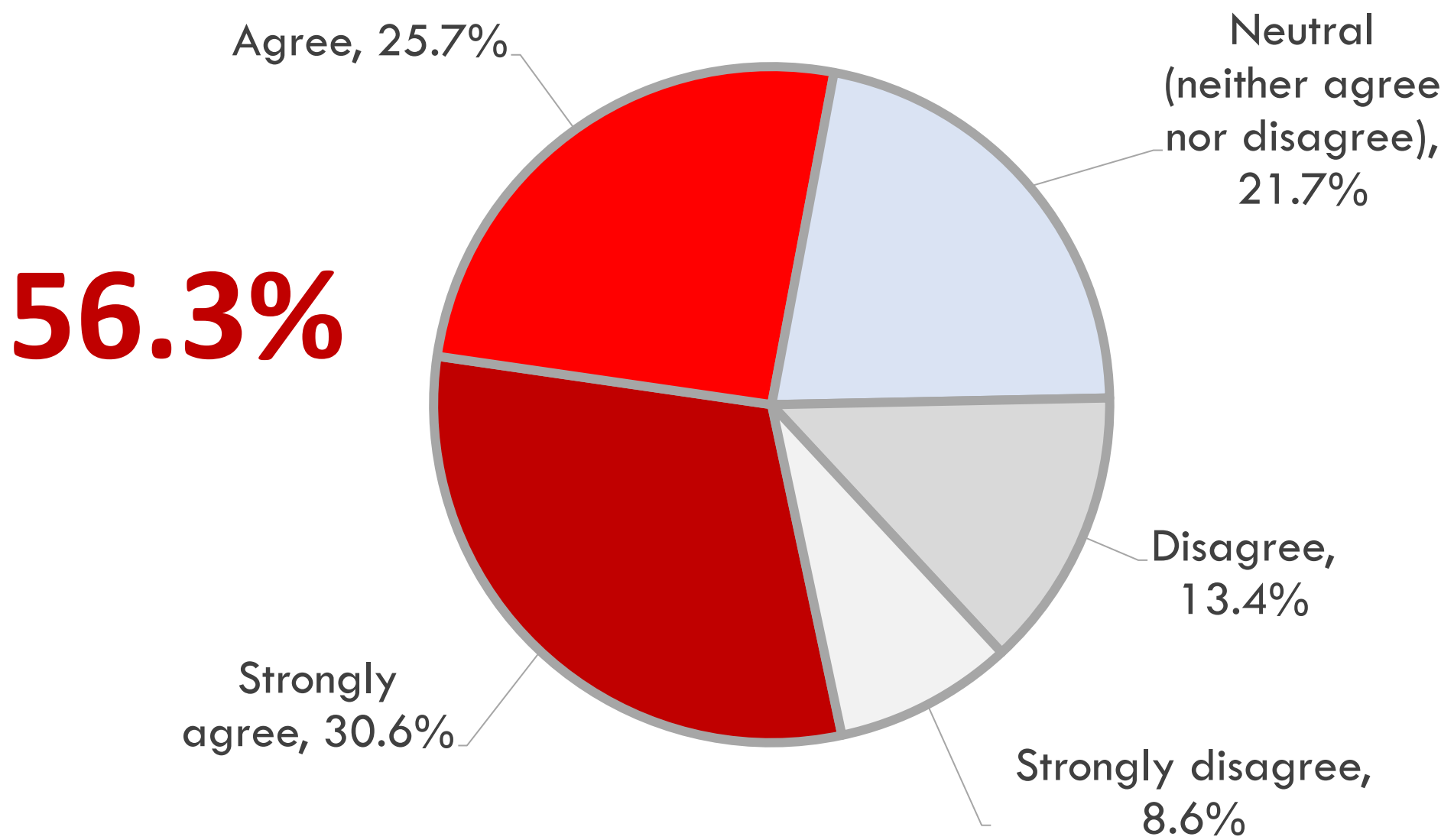
Historical data



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

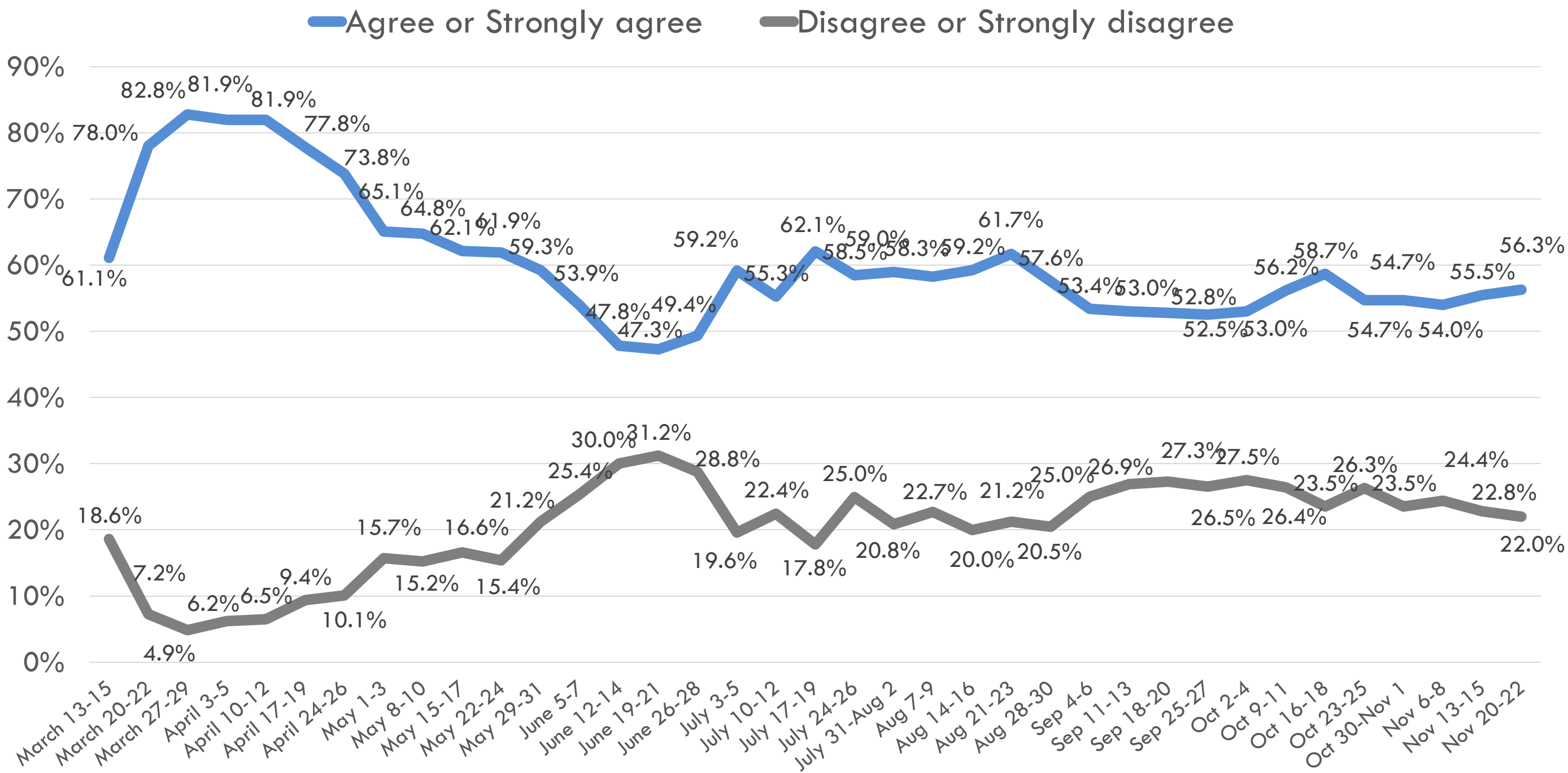
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



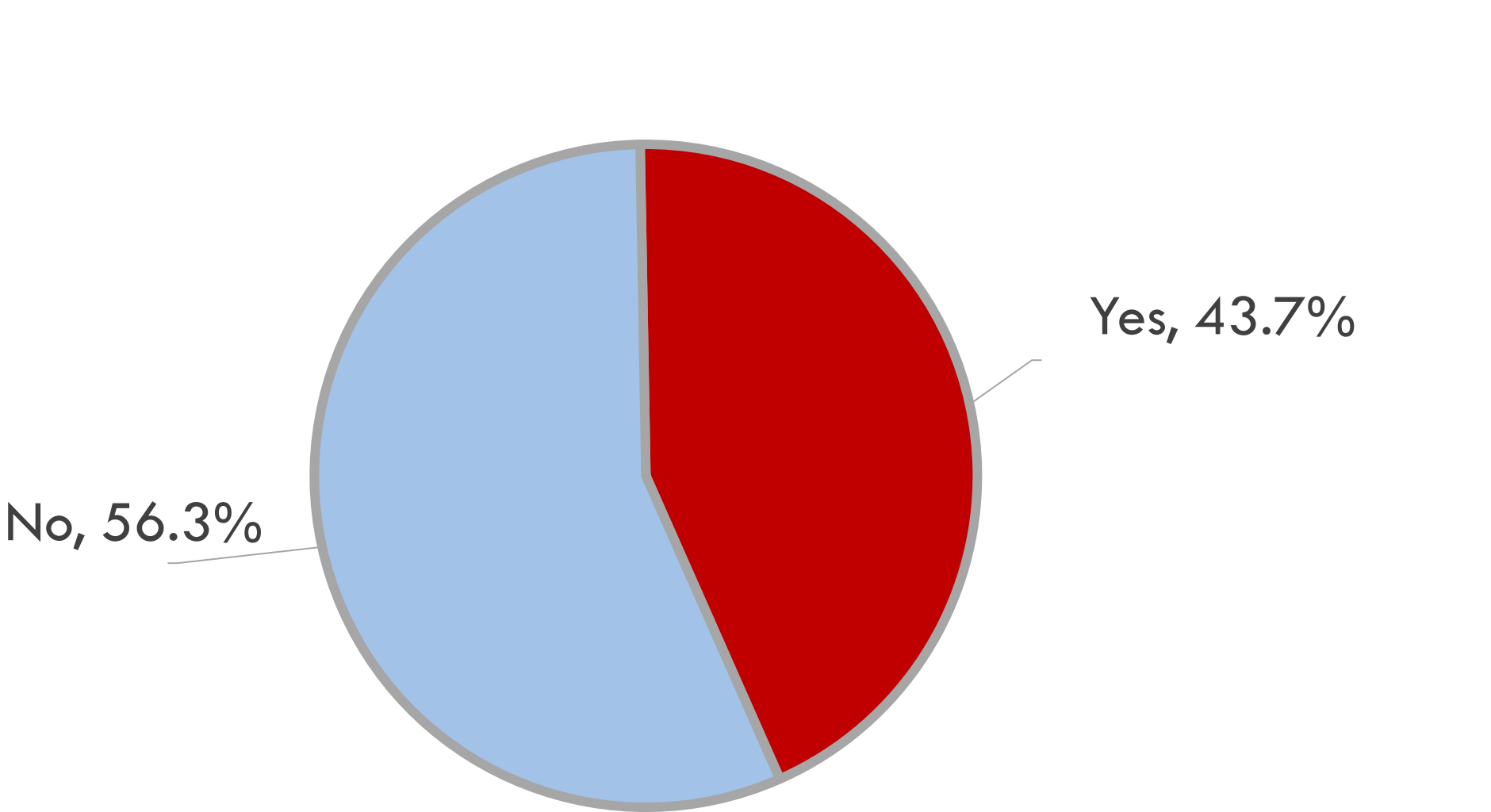
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Historical data

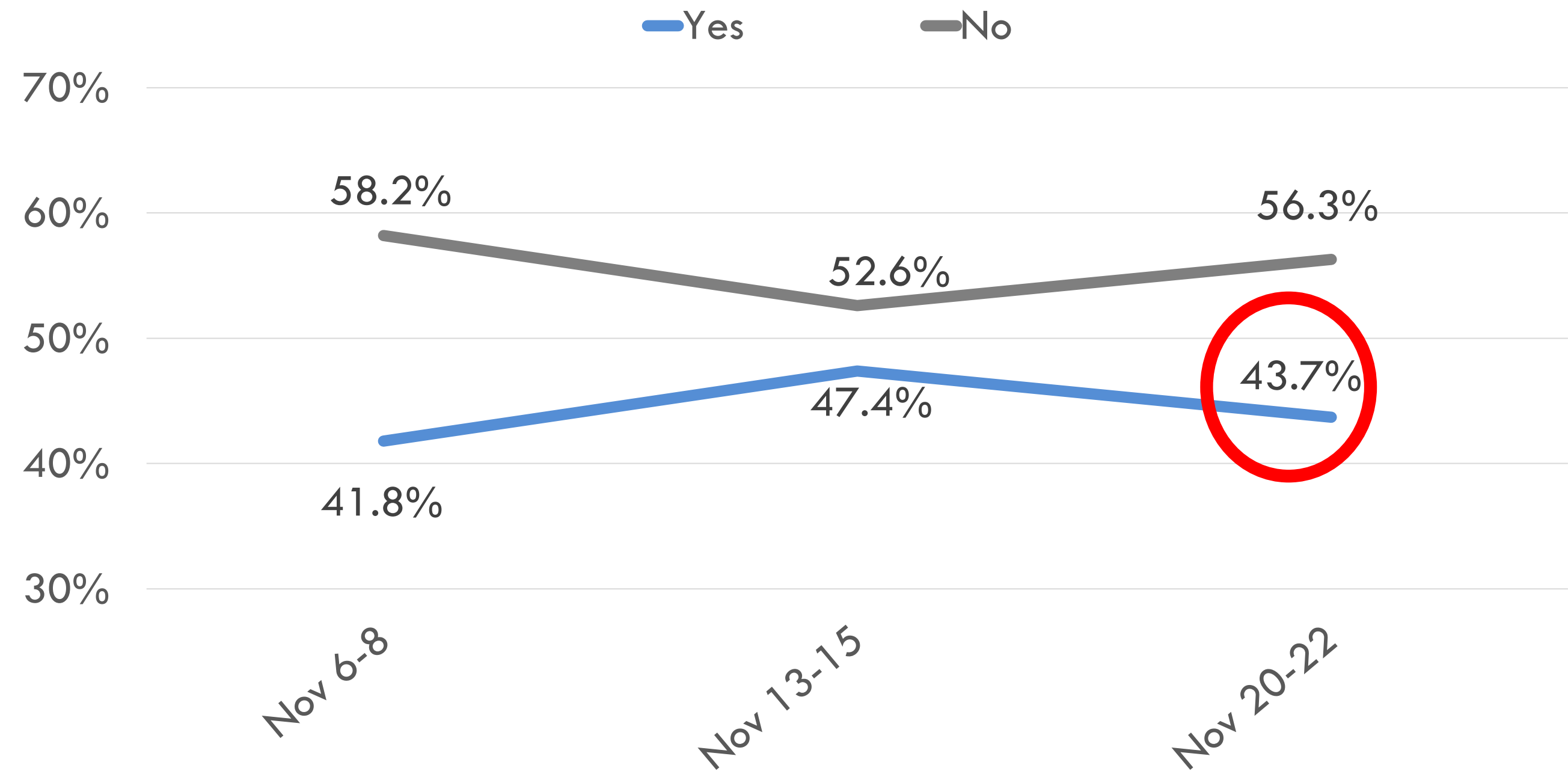


CHANGES TO TRAVEL PLANS DUE TO RECENT CORONAVIRUS SURGES

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



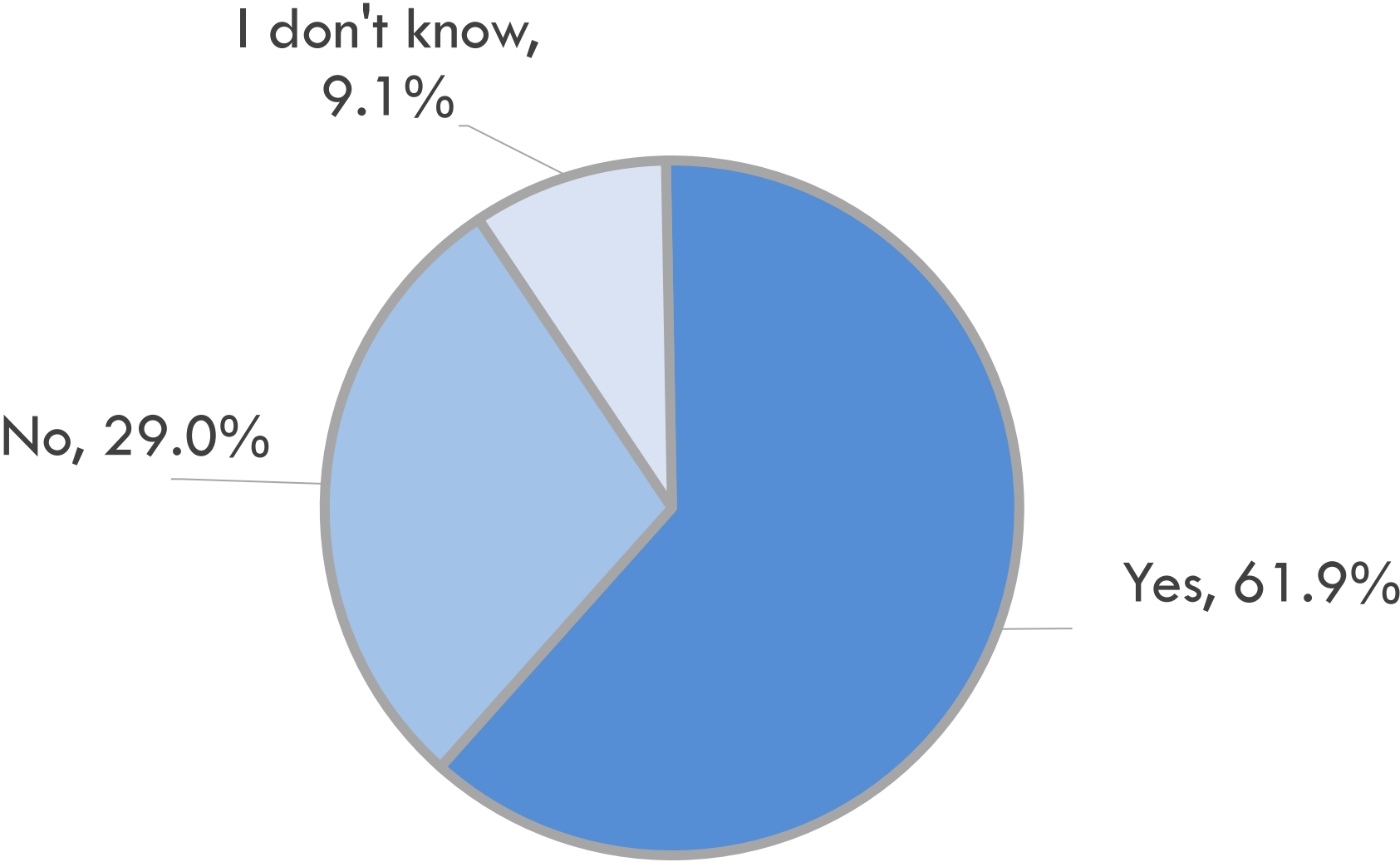
Historical data



(Base: Waves 35-37 data. All respondents, 1,205, 1,206 and 1,205 completed surveys.)

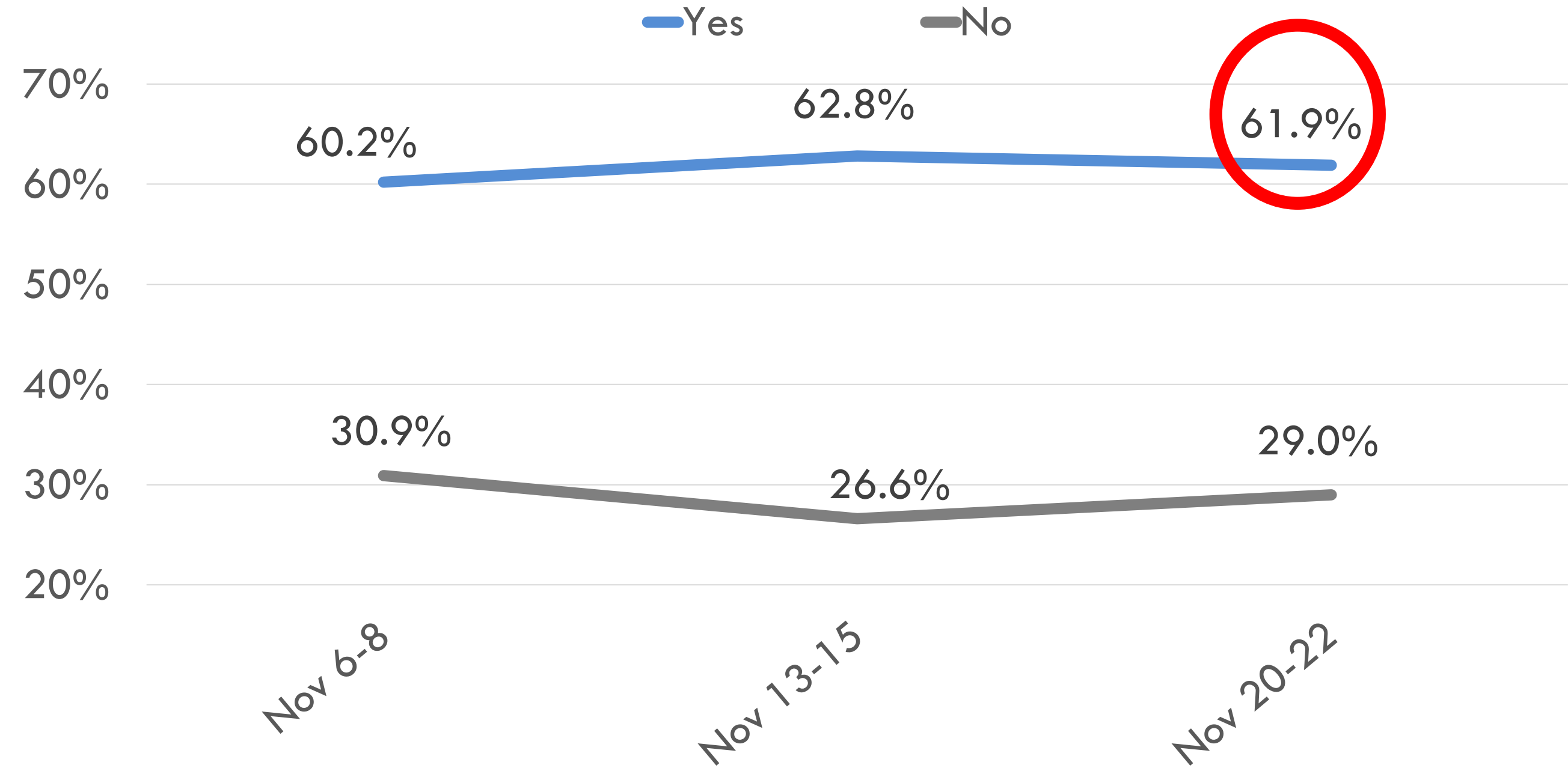
EFFECTS OF RECENT CORONAVIRUS SURGES

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



(Base: Waves 35-37 data. All respondents, 1,205, 1,206 and 1,205 completed surveys.)

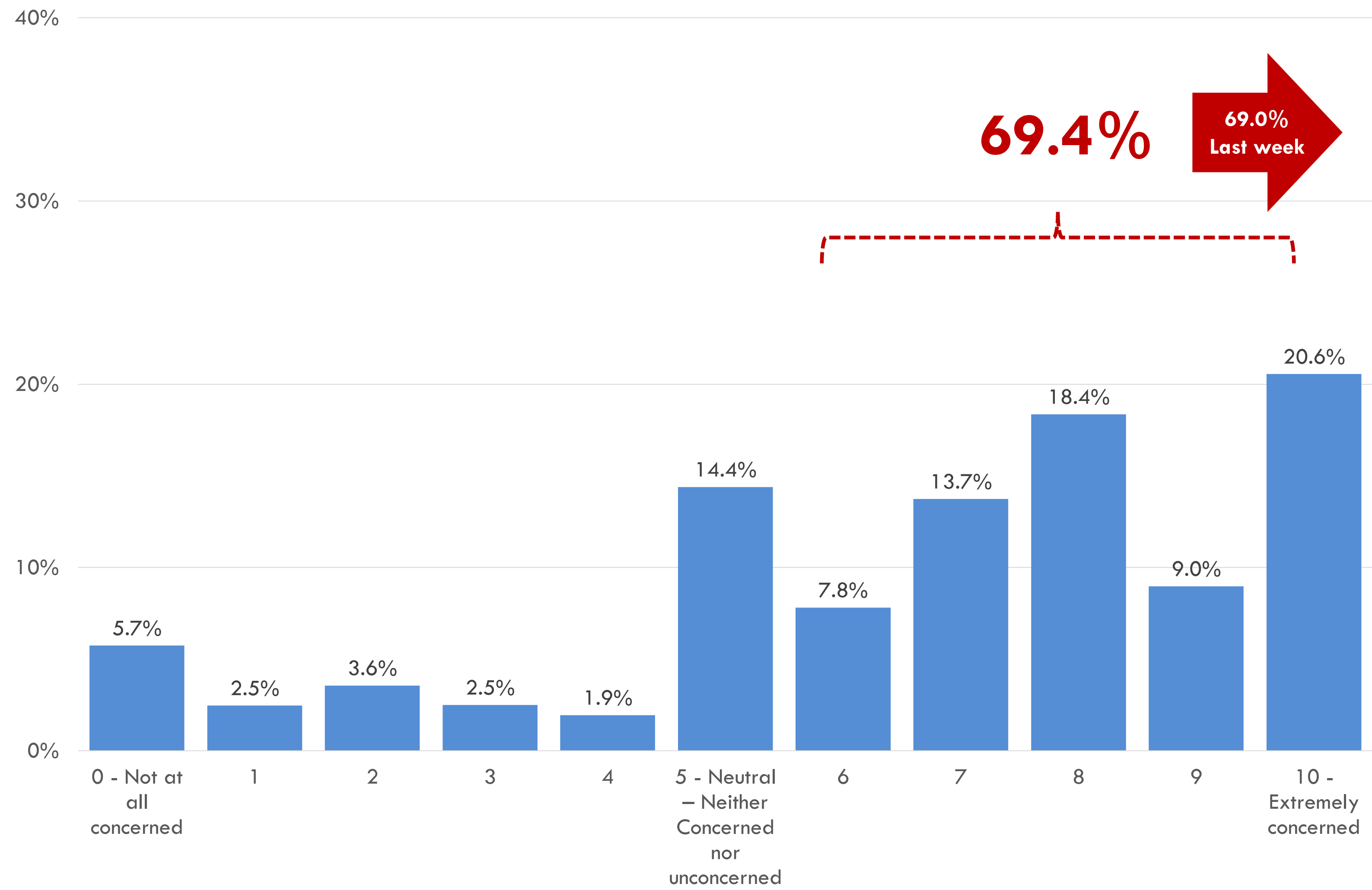
Historical data



PERSONAL HEALTH CONCERNS

Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

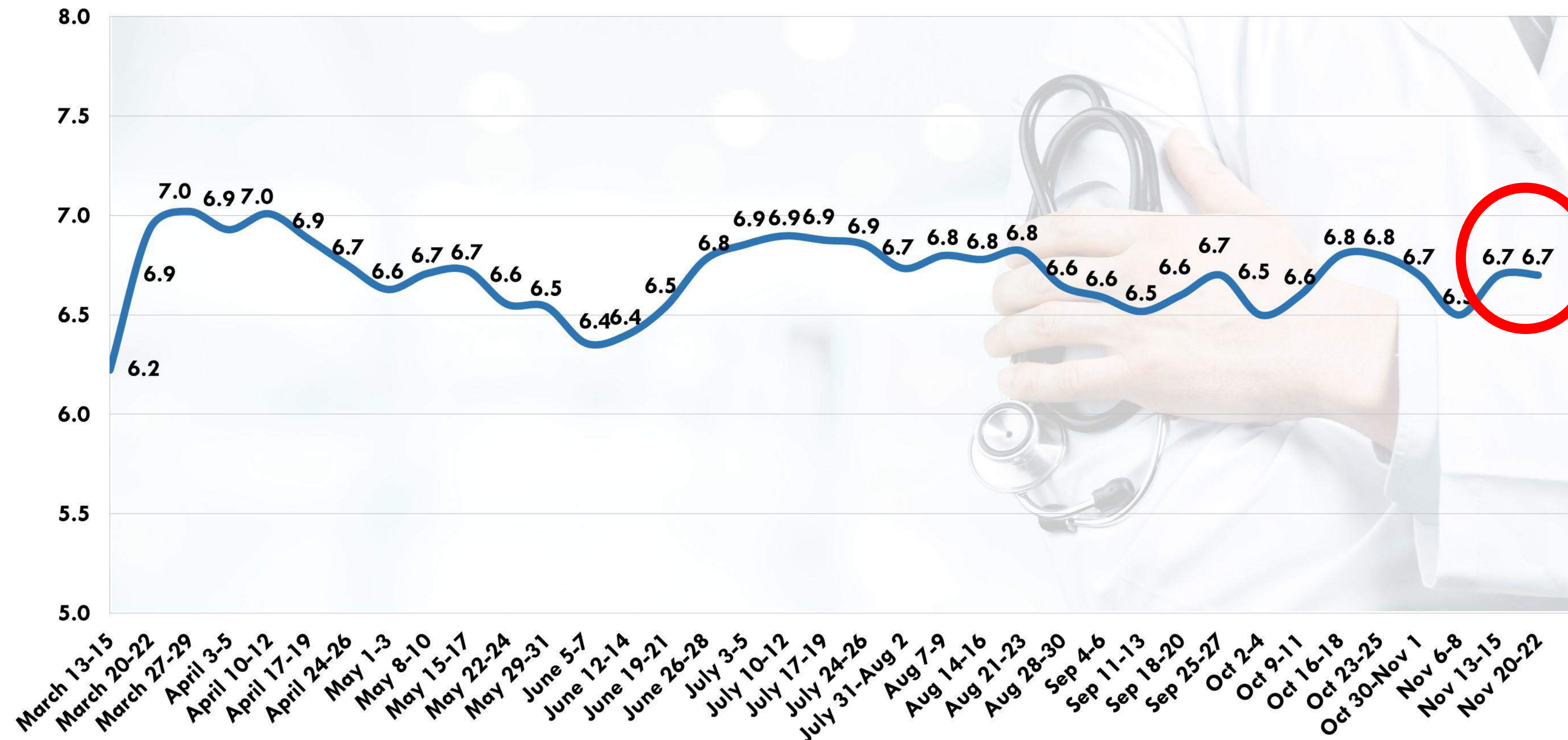


PERSONAL HEALTH CONCERNS

MARCH 13 – NOVEMBER 22



CONCERNED ABOUT PERSONAL HEALTH (AVERAGE SCORE ON AN 11-POINT SCALE)



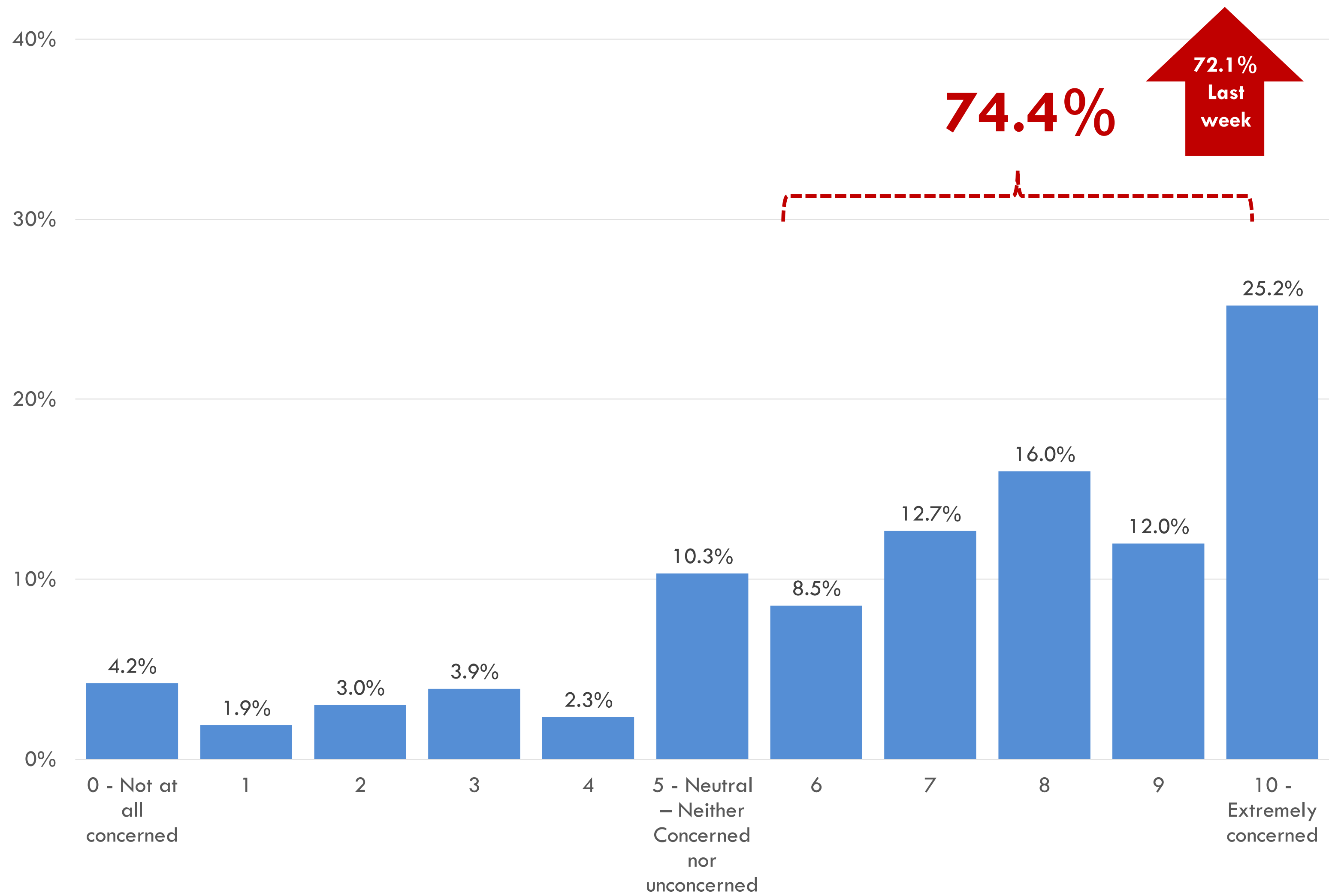
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?

(Base: Waves 1-37. 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 and 1,205 completed surveys.

HEALTH CONCERNS (FAMILY & FRIENDS)

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your **FRIENDS OR FAMILY** contracting the virus? (Please answer using the scale below)

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

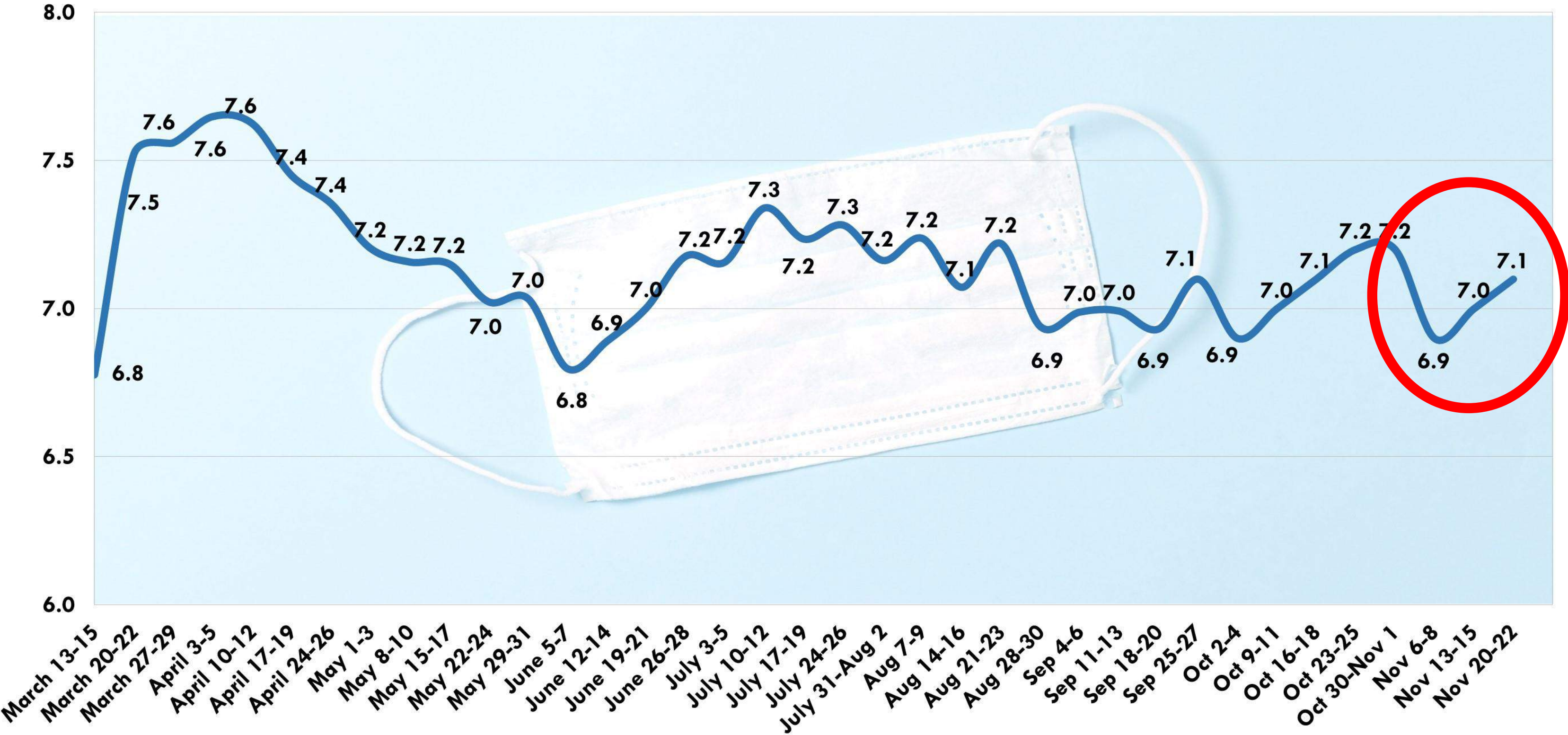


HEALTH CONCERNS (FAMILY & FRIENDS)

MARCH 13 – NOVEMBER 22



CONCERNED ABOUT THE HEALTH OF FAMILY OR FRIENDS
(AVERAGE SCORE ON AN 11-POINT SCALE)



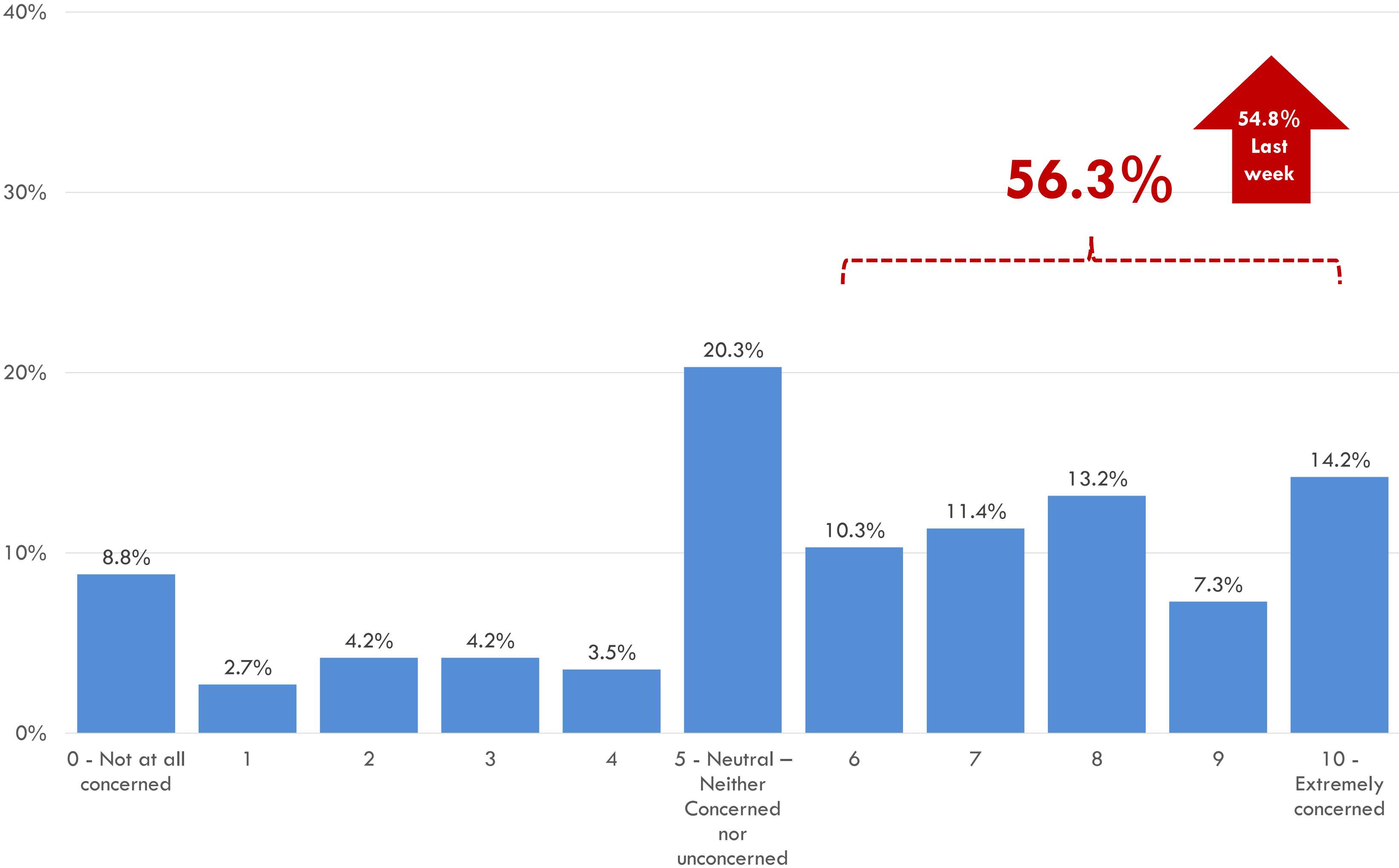
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?

(Base: Waves 1-37. 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 and 1,205 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 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)



CONCERNS ABOUT PERSONAL FINANCES

MARCH 13 – NOVEMBER 22



CONCERNED ABOUT PERSONAL FINANCES (AVERAGE SCORE ON AN 11-POINT SCALE)



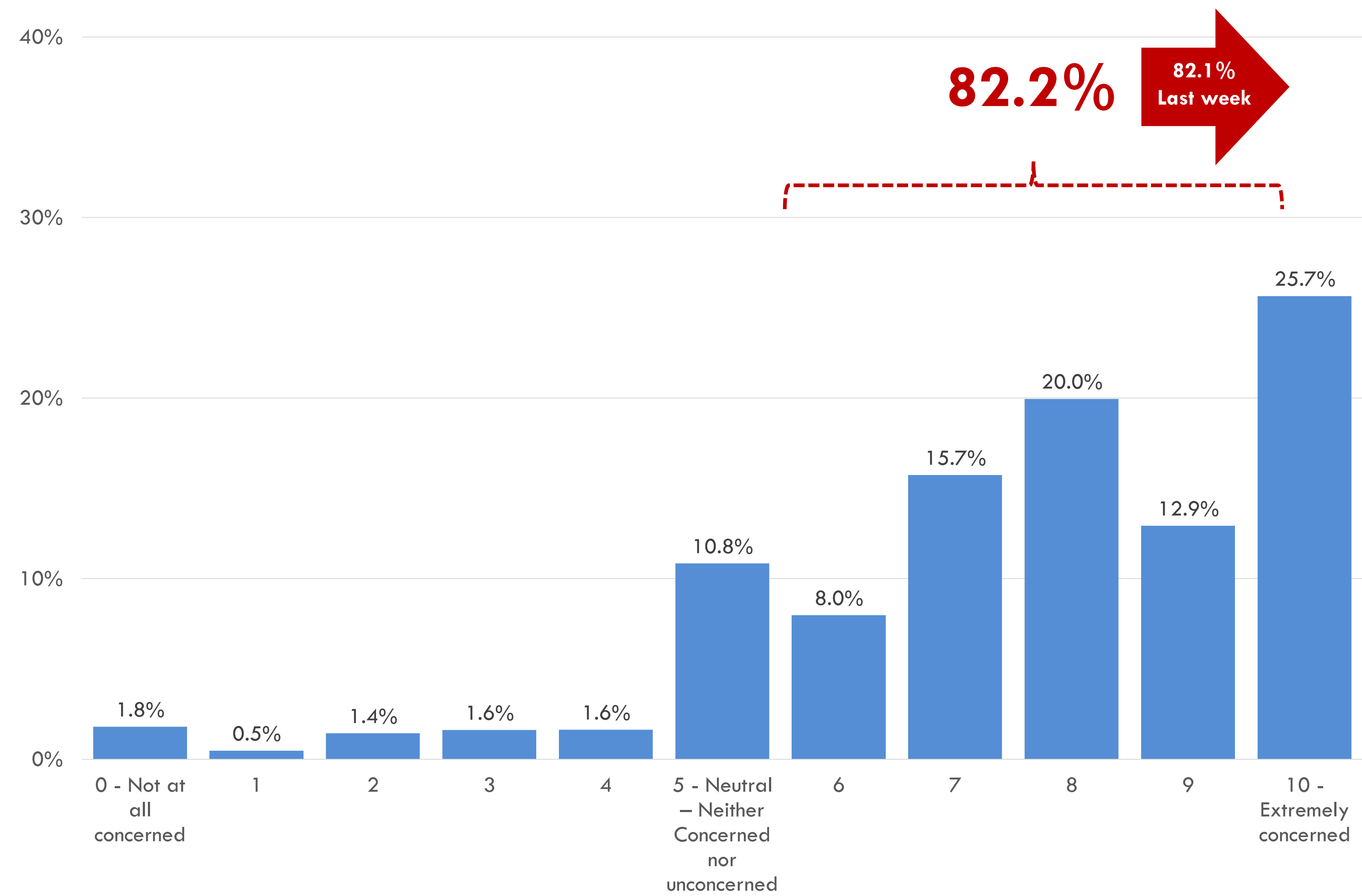
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON YOUR PERSONAL FINANCES?

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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 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

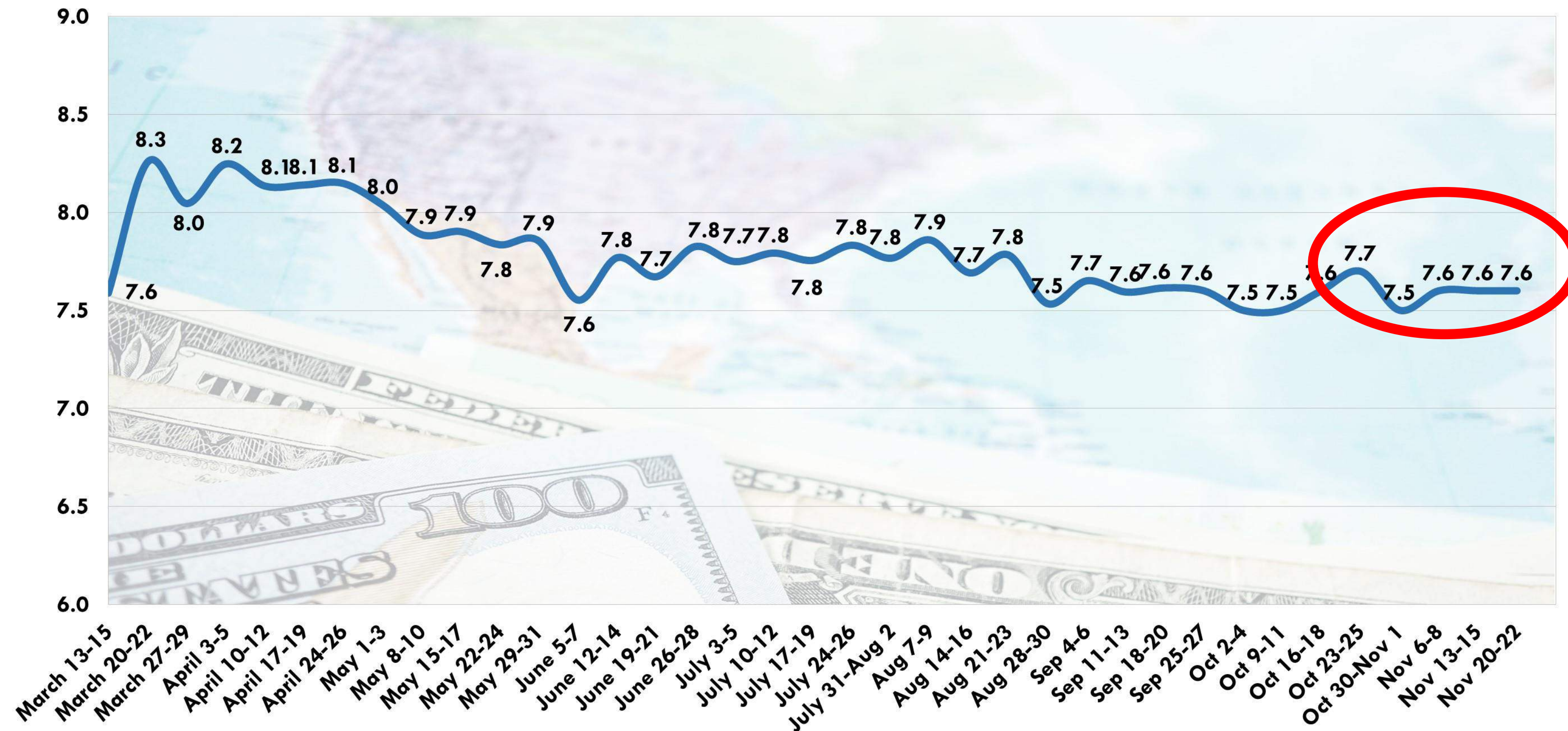


CONCERNS ABOUT NATIONAL ECONOMY

MARCH 13 – NOVEMBER 22



CONCERNED ABOUT NATIONAL ECONOMY (AVERAGE SCORE ON AN 11-POINT SCALE)



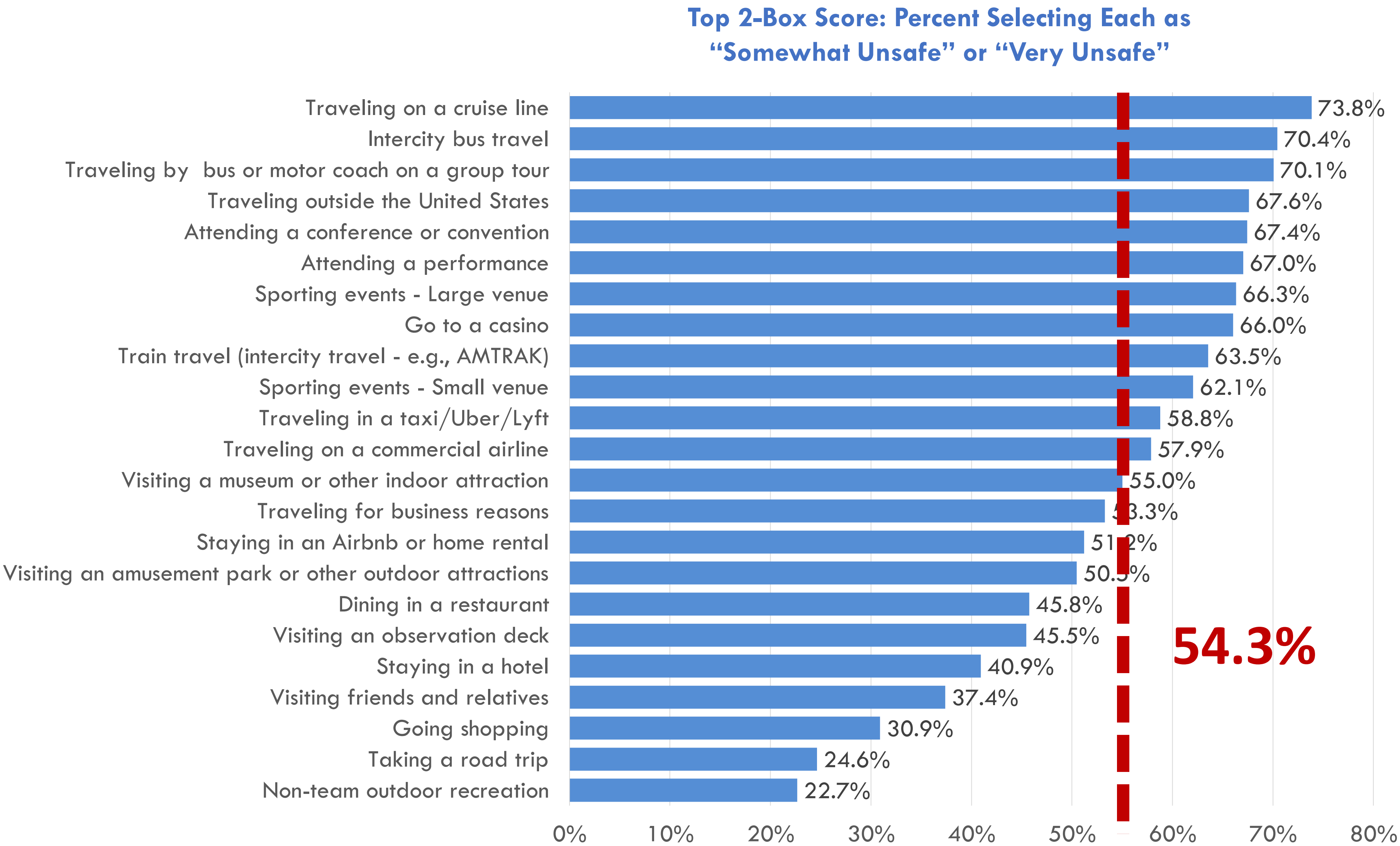
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE NATIONAL ECONOMY?

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PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 37)

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

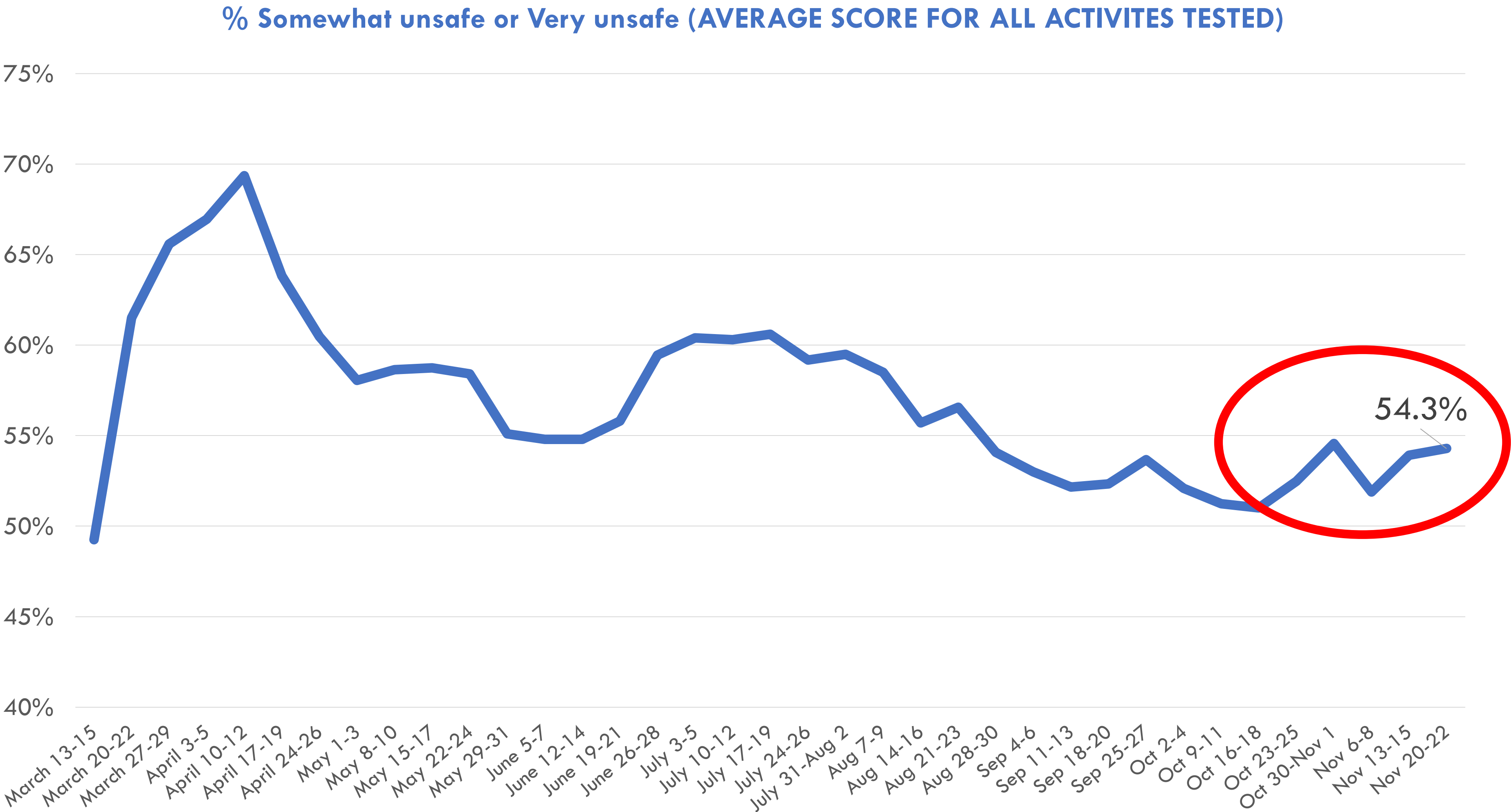
(Base: Wave 37 data. All respondents, 1,205 completed surveys.
Data collected Nov 20-22, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-37 COMPARISON)

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

(Base: Waves 1-37. 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 and 1,205 completed surveys.)

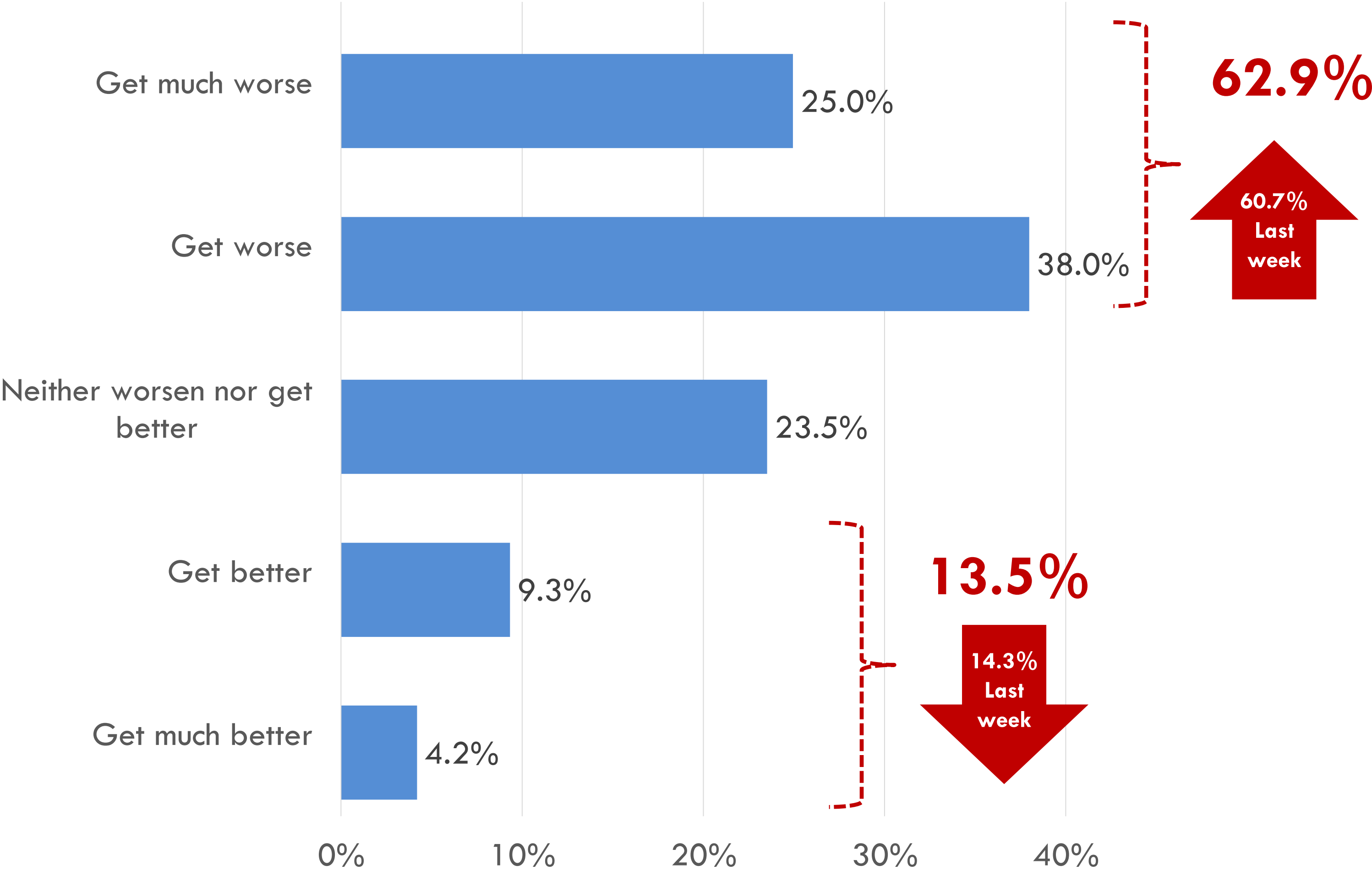


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

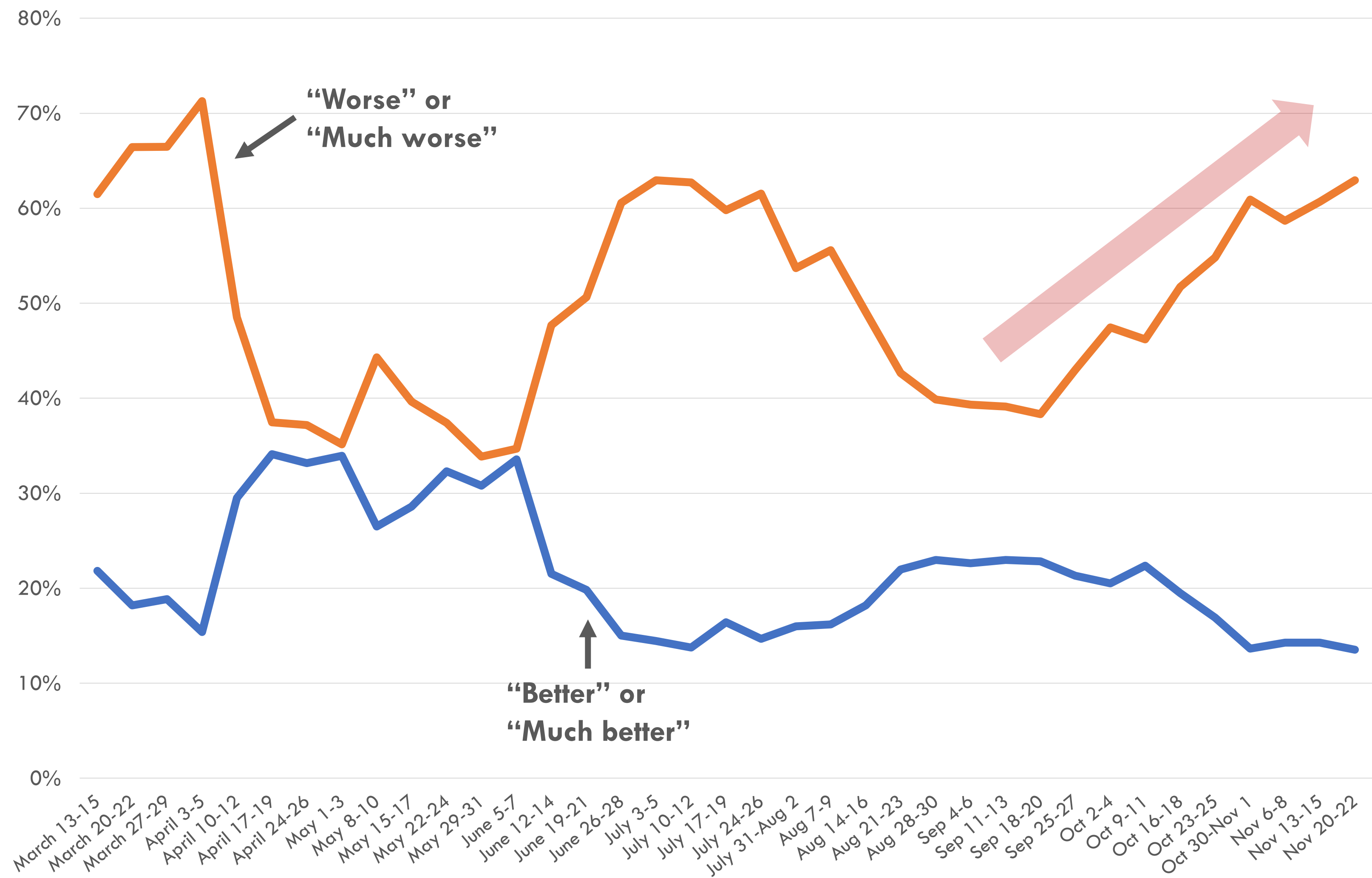


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-37)

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(Base: Waves 1-37. 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 and 1,205 completed surveys.)

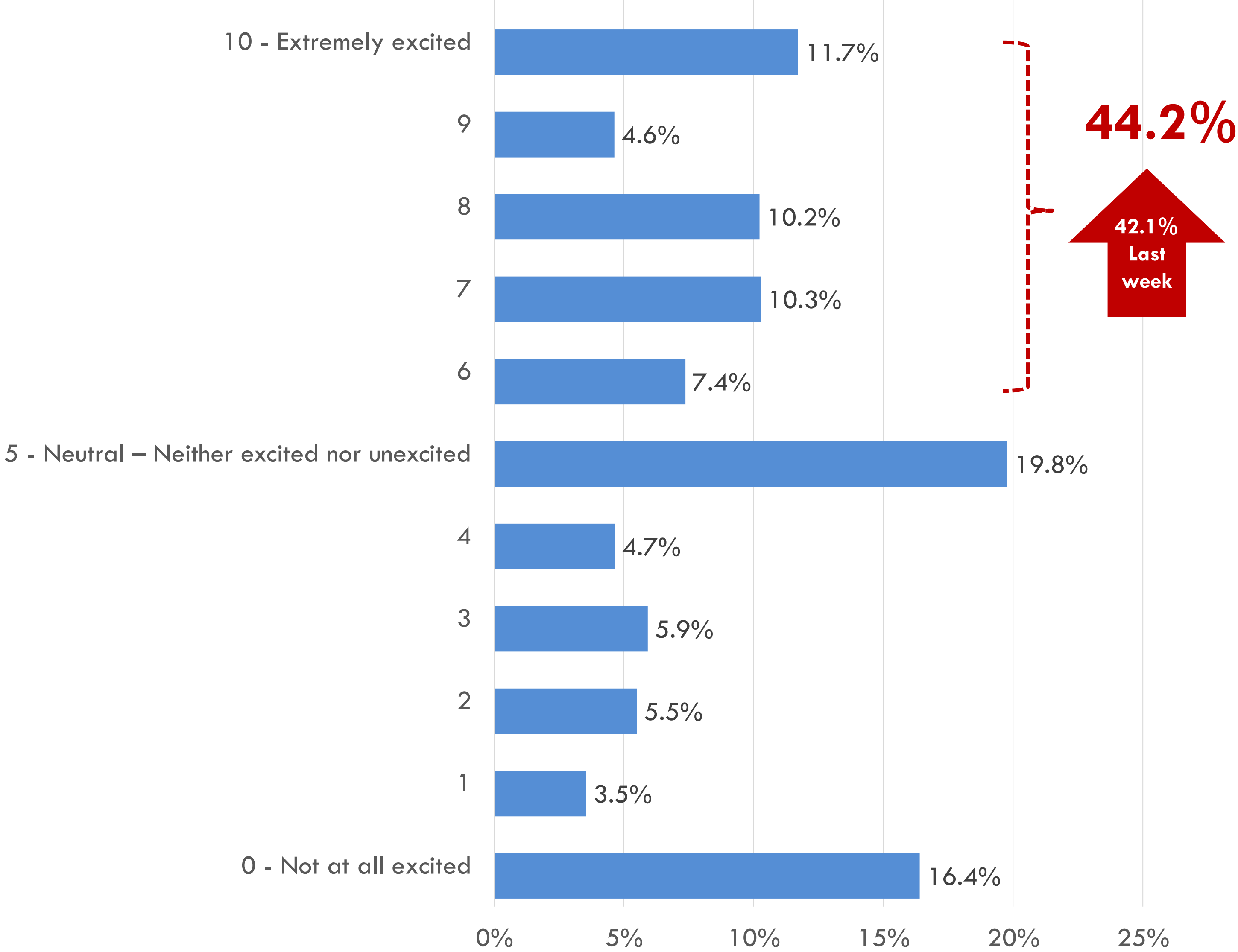


EXCITEMENT TO TRAVEL NOW

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 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

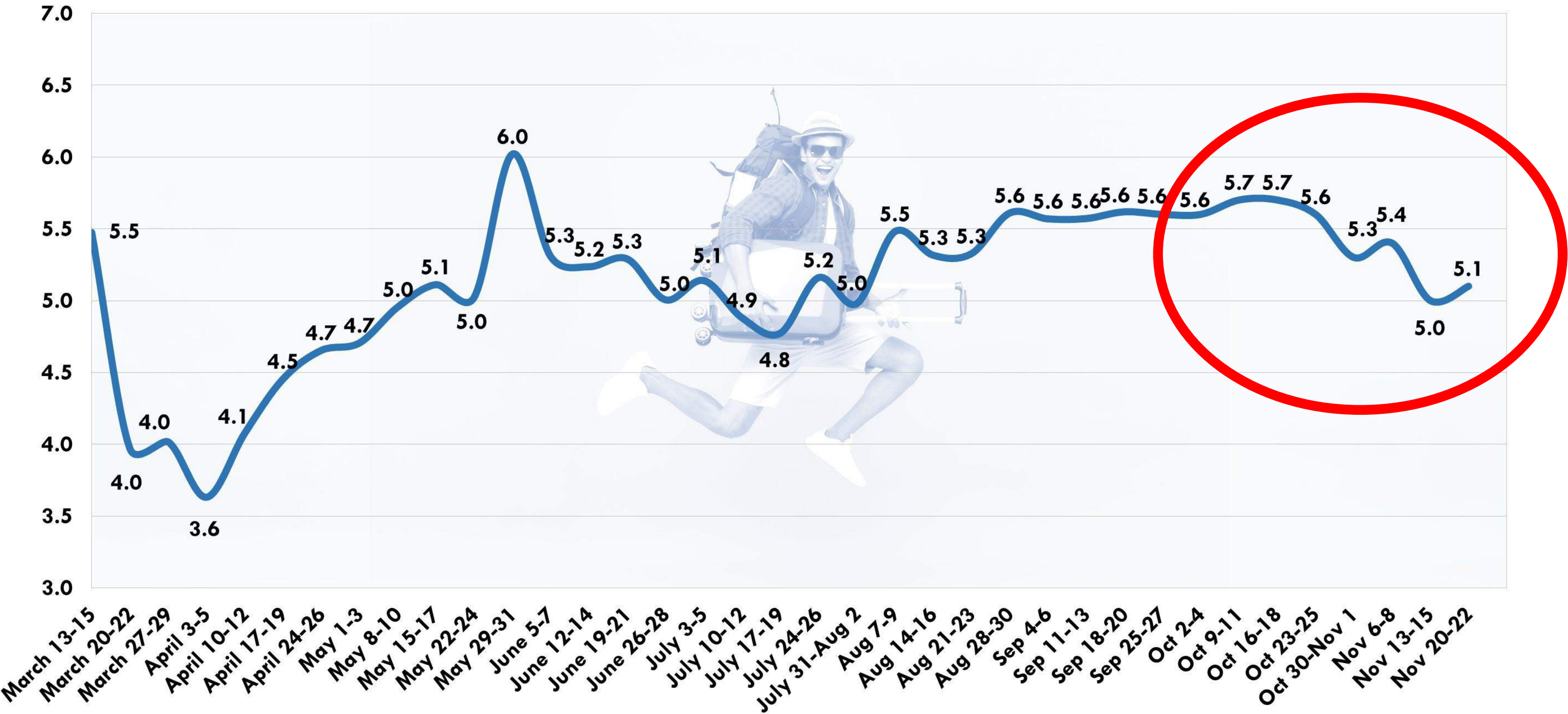


EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – NOVEMBER 22



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



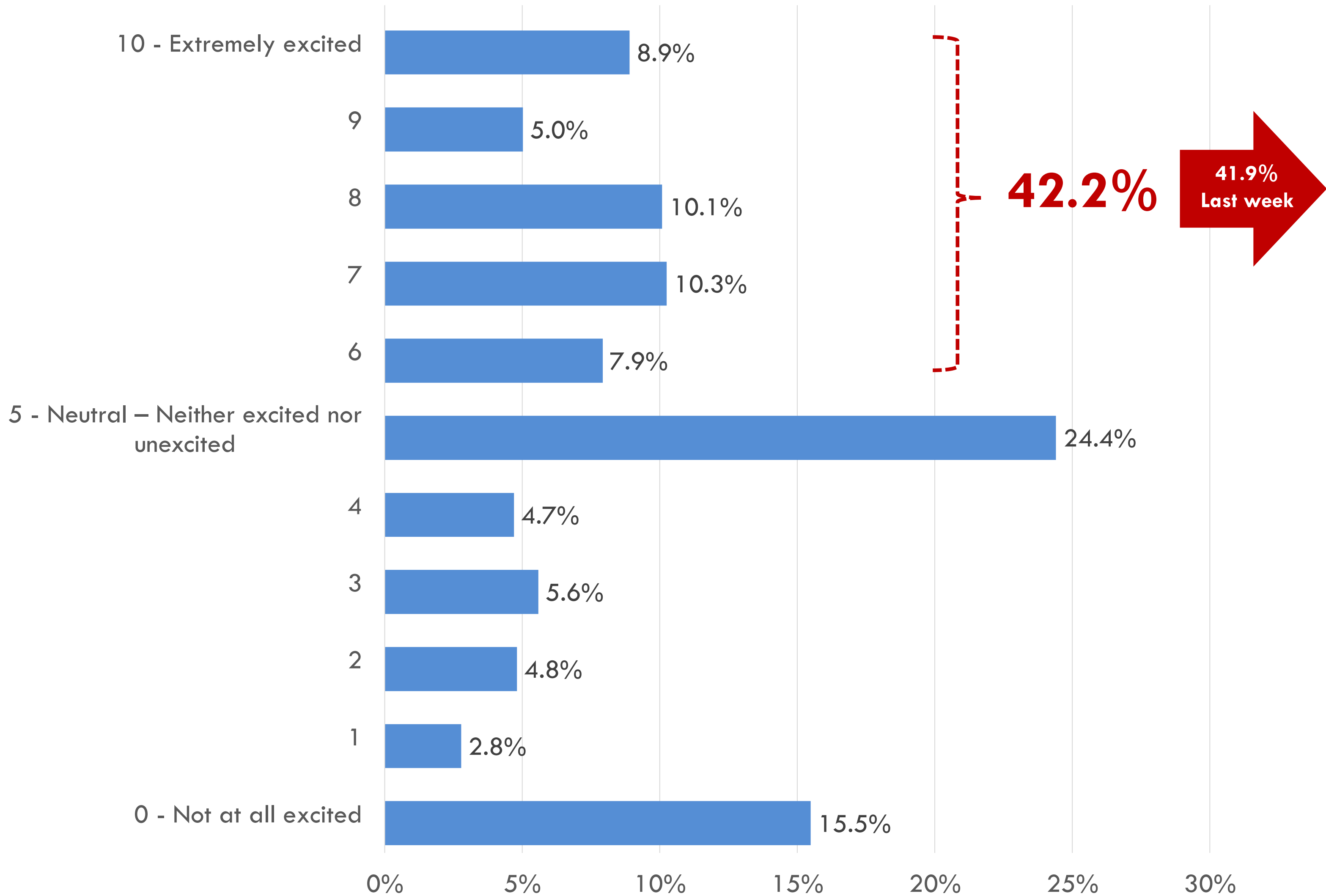
QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

(Base: Waves 1-37. 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 and 1,205 completed surveys.

OPENNESS TO TRAVEL INSPIRATION

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

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected Nov 20-22, 2020)

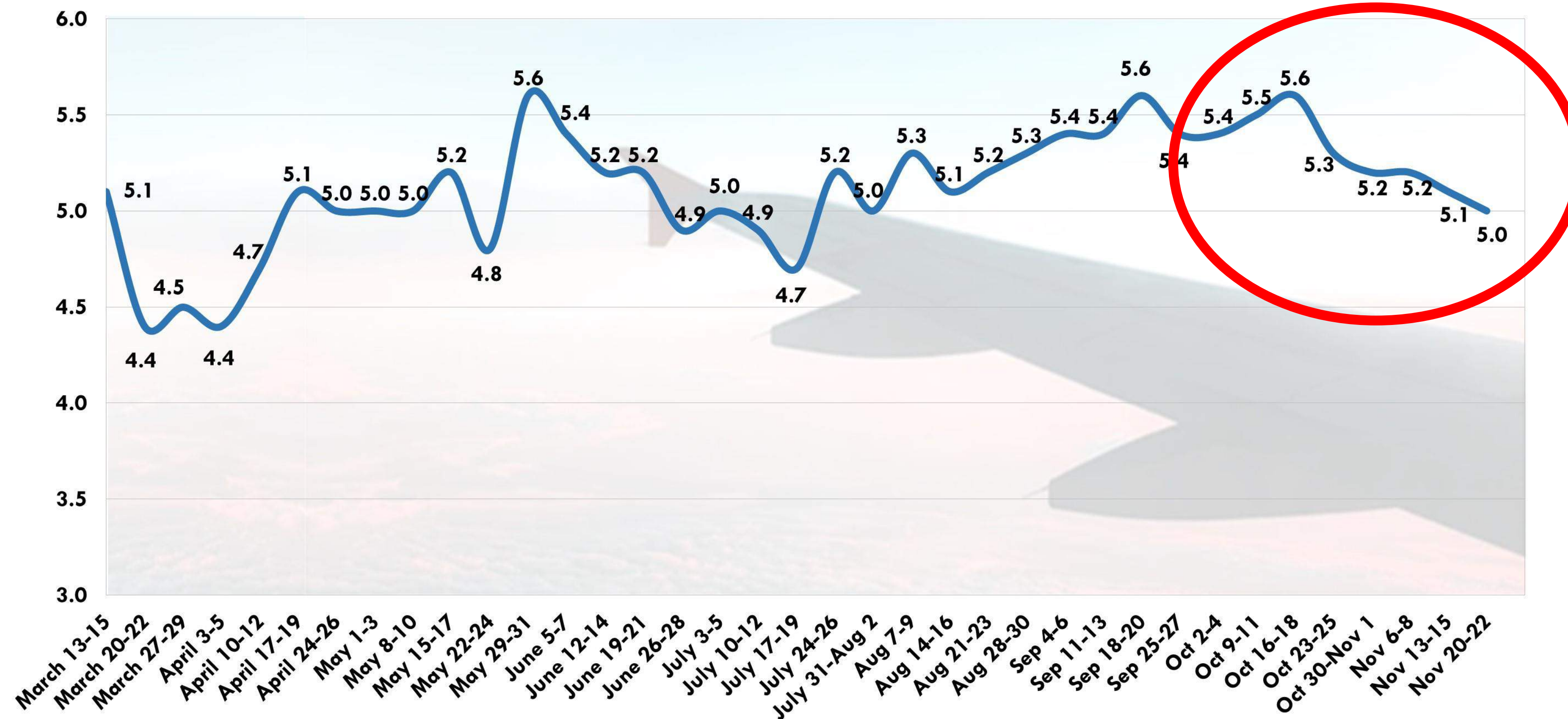


OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – NOVEMBER 22



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 1-37. 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 and 1,205 completed surveys.

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

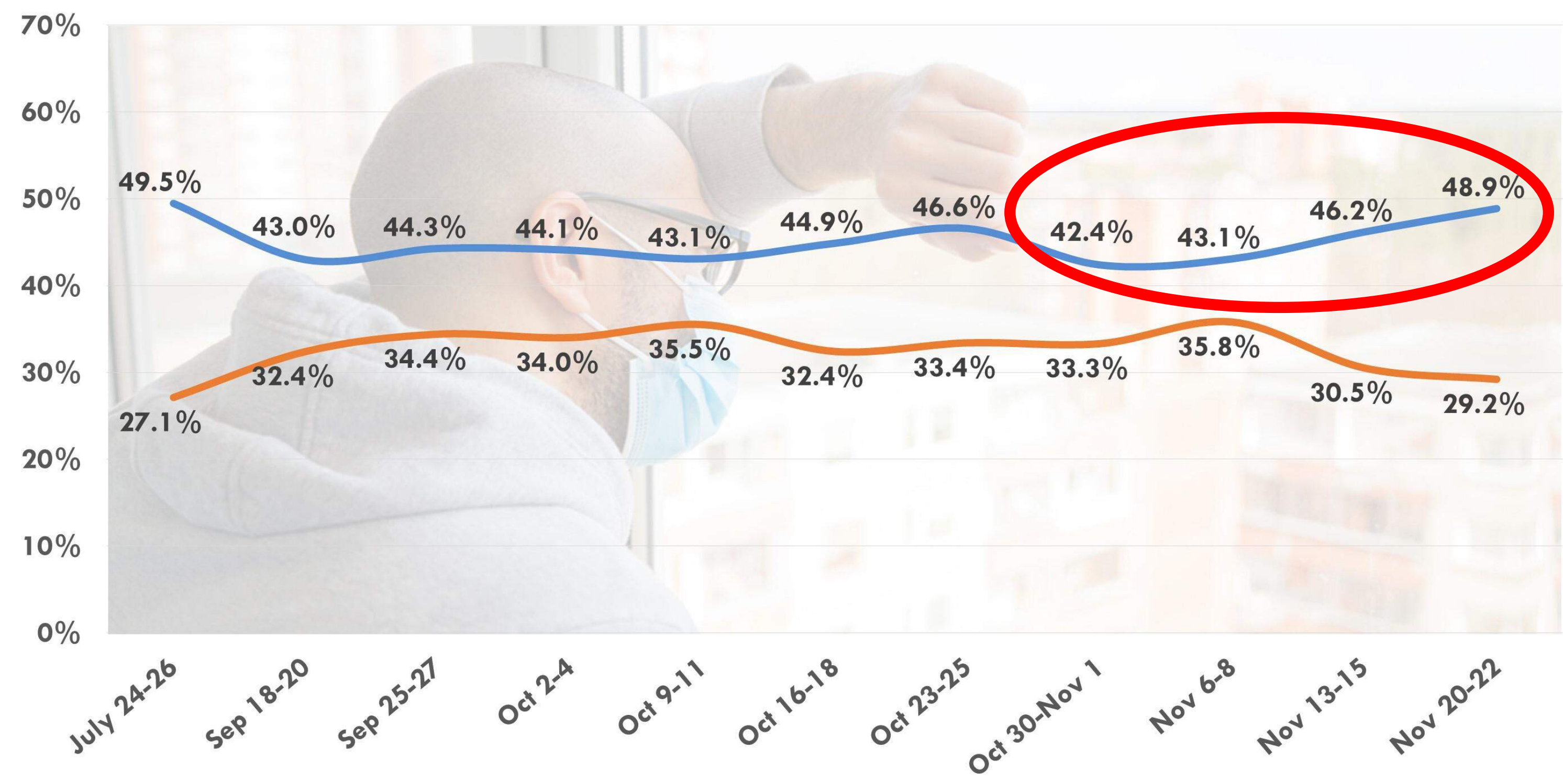


LOSS OF INTEREST IN TRAVEL

JULY 24 – NOVEMBER 22

AGREE OR STRONGLY AGREE

DISAGREE OR STRONGLY DISAGREE

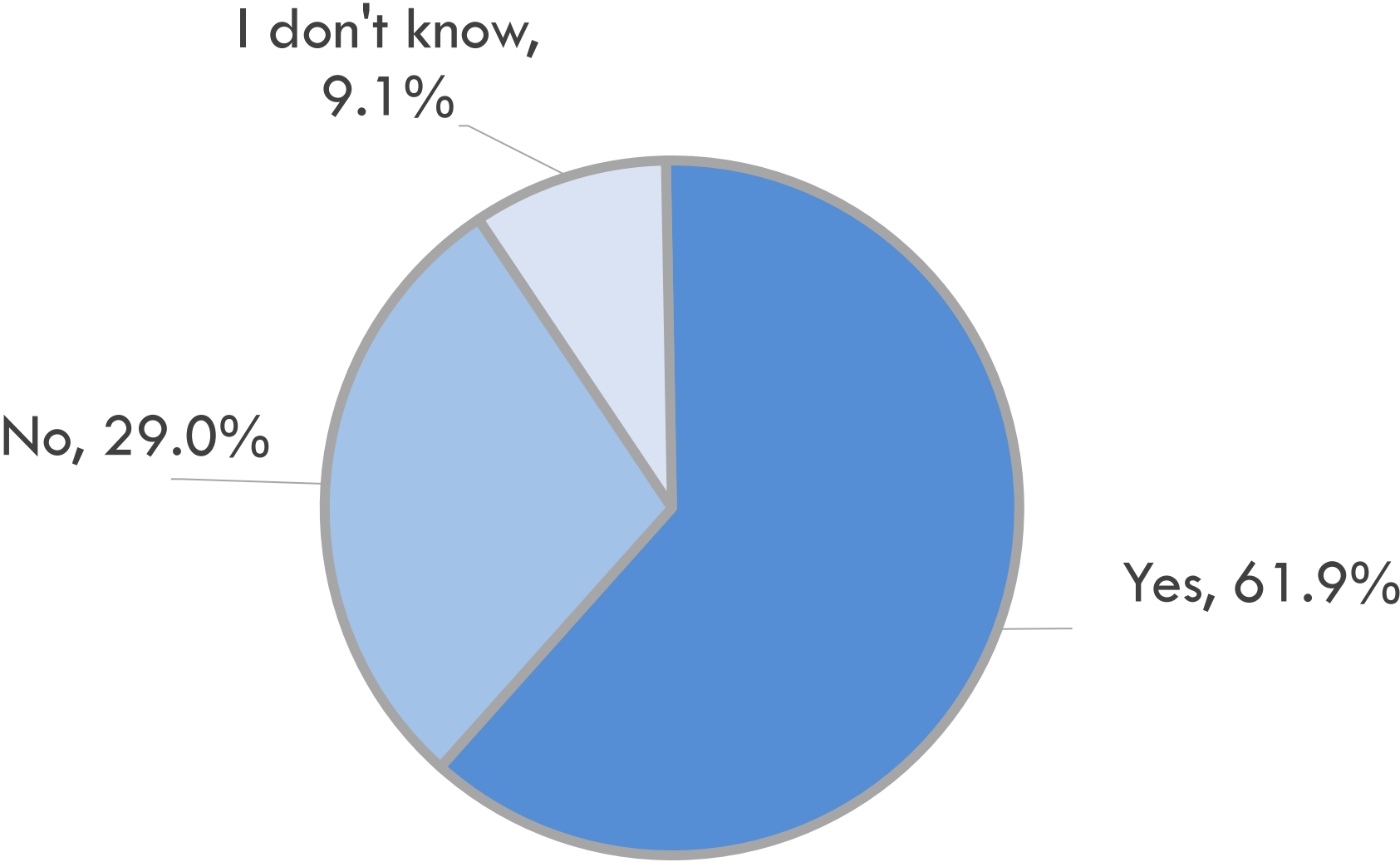


QUESTION: HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT?
STATEMENT: I HAVE LOST MY INTEREST IN/TASTE FOR TRAVELING FOR THE TIME BEING.

(Base: Waves 20, 28-37 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.

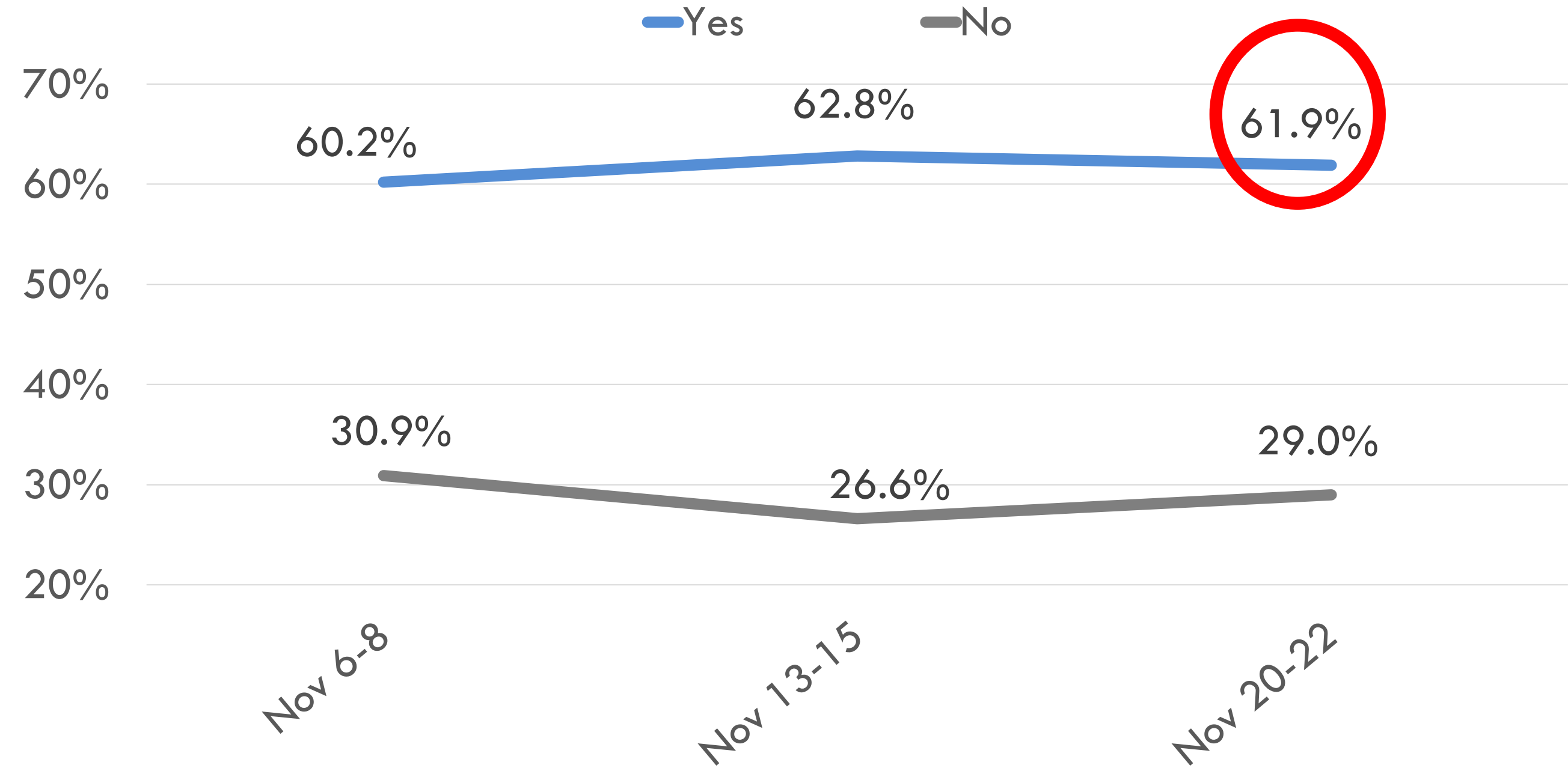
EFFECTS OF RECENT CORONAVIRUS SURGES

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



(Base: Waves 35-37 data. All respondents, 1,205, 1,206 and 1,205 completed surveys.)

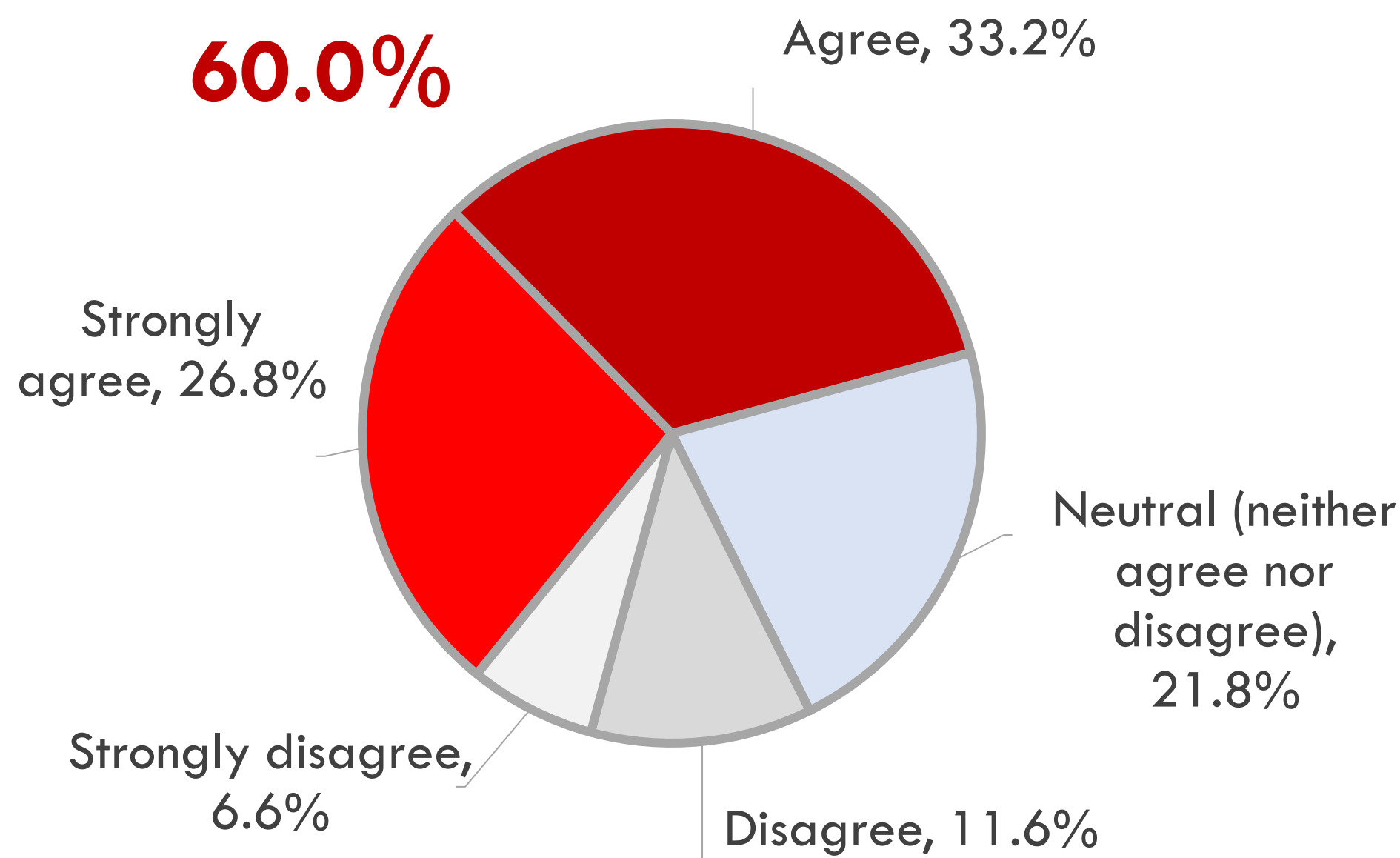
Historical data



INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

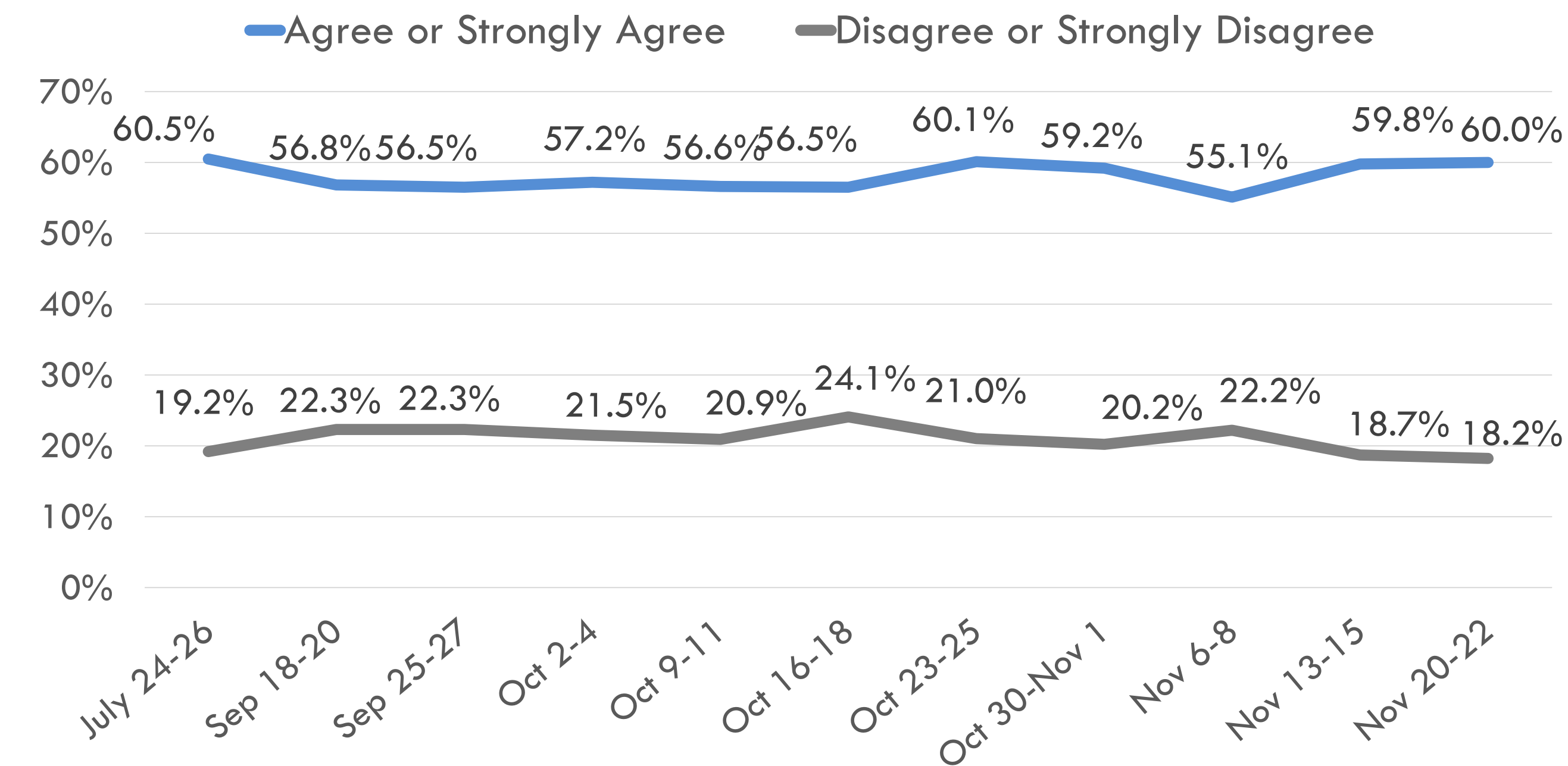
How much do you agree with the following statement?

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



(Base: Waves 20, 28-37 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.)

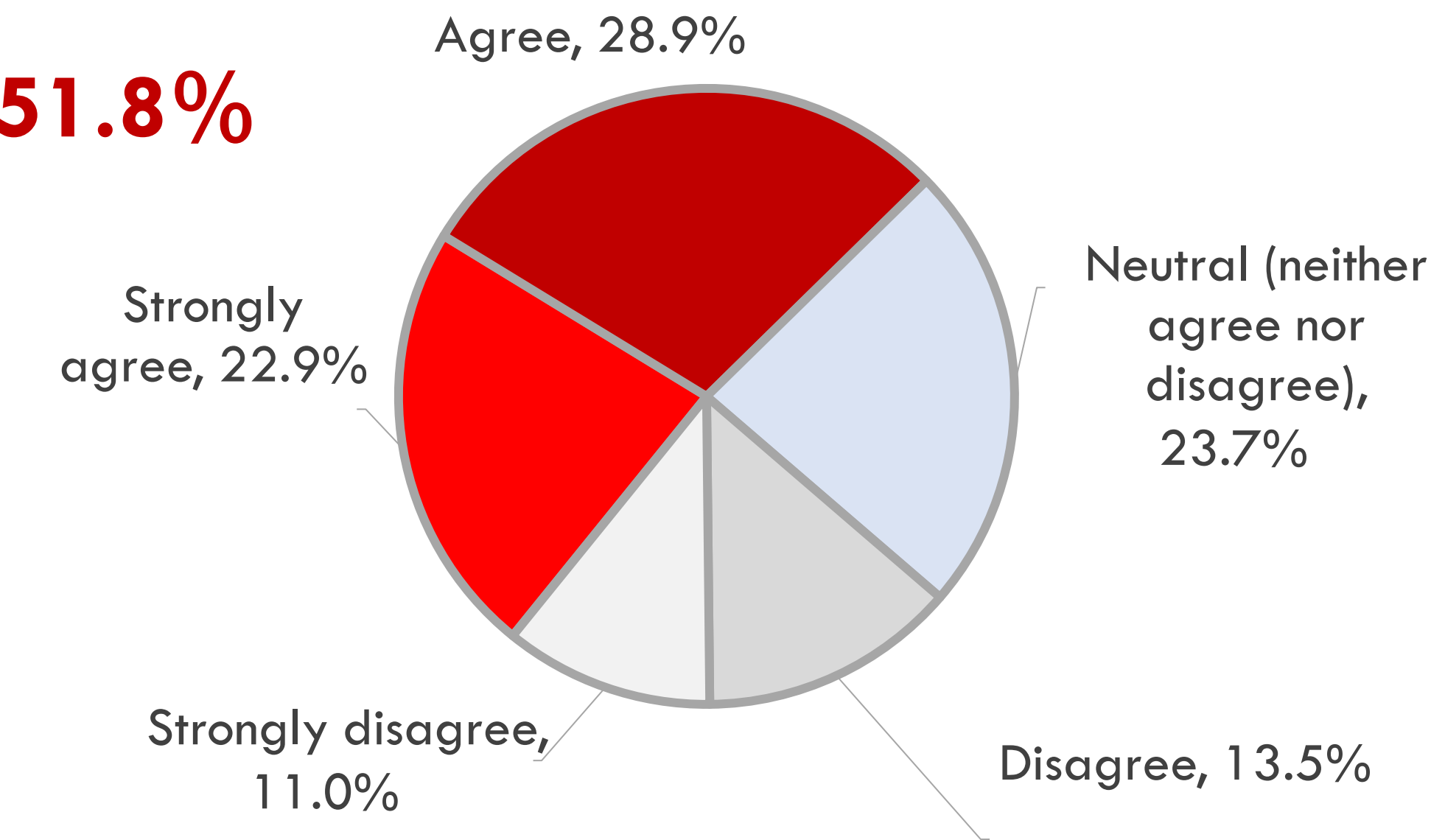
Historical data



TRAVEL GUILT

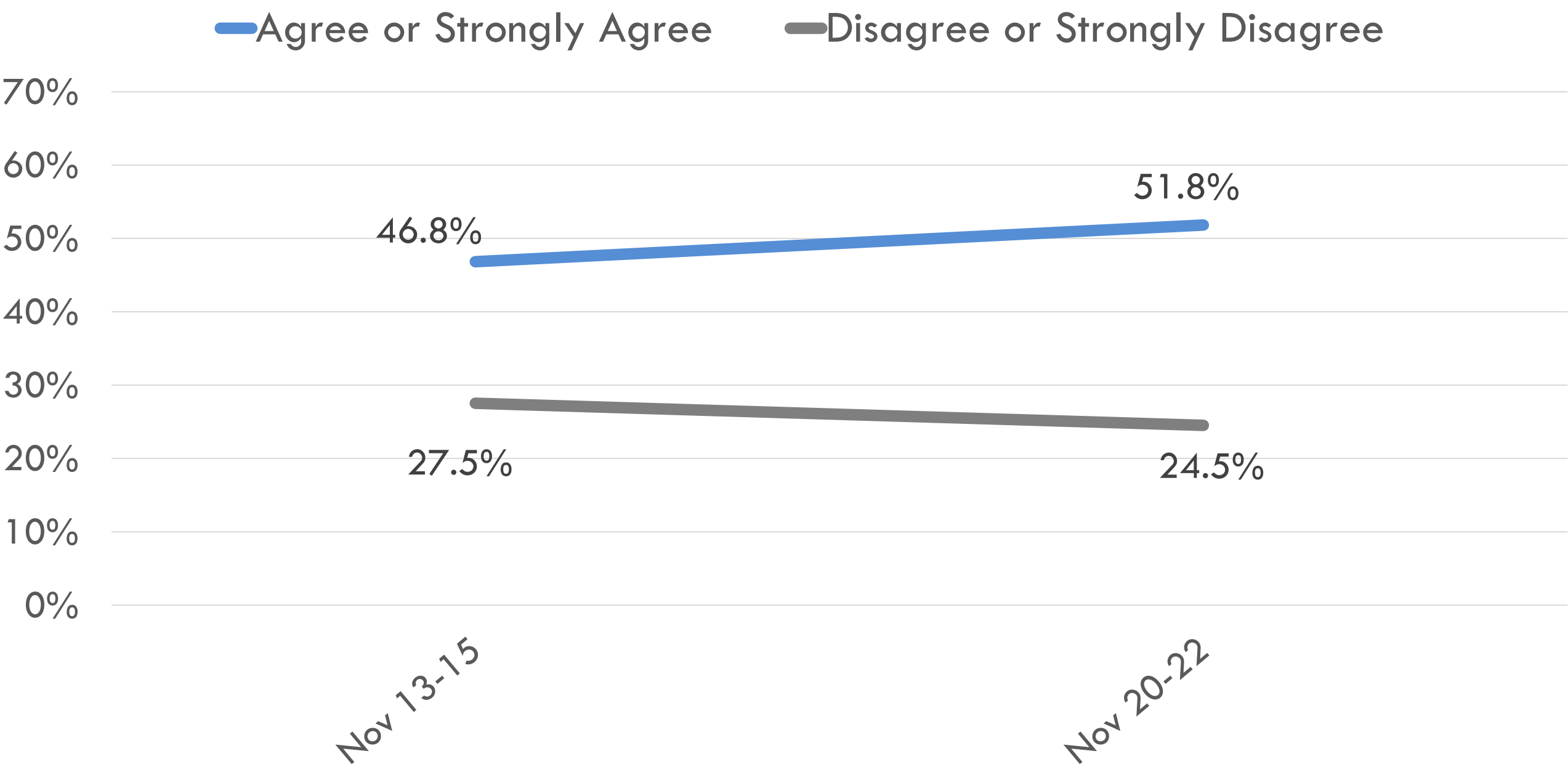
How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



(Base: Waves 36 and 37 data. All respondents, 1,206 and 1,205 completed surveys.)

Historical data



Key Takeaway

The Fall wave of infections has clearly impacting traveler sentiment over the last several weeks.

- Readiness to travel
- Expectations for the pandemic worsening
- Excitement to travel right now
- Openness to travel inspiration
- Loss of interest in travel
- Perceived ability to enjoy travel

Me: This show is boring.

Boss: Again, this is a Zoom meeting.



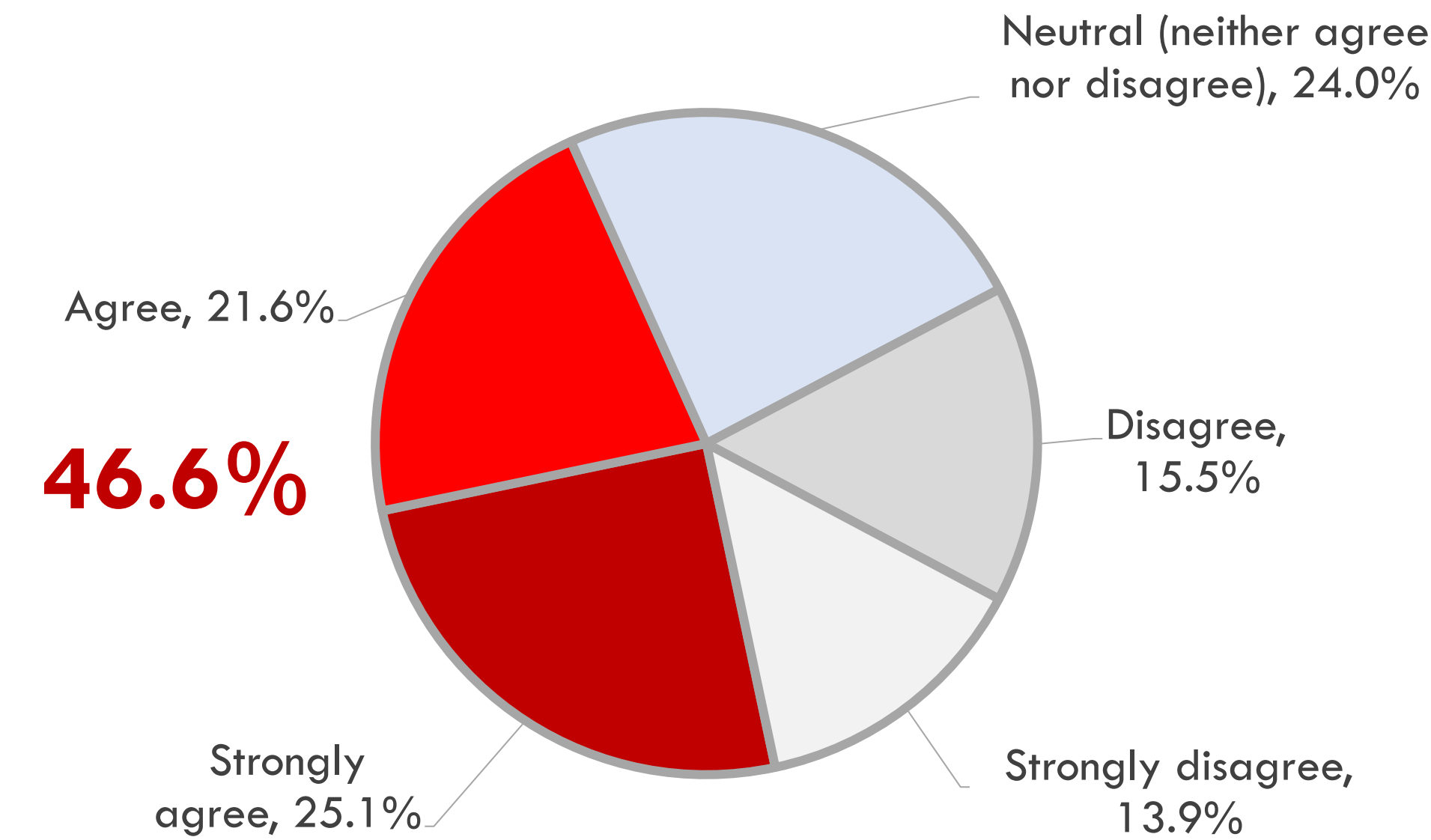
Travelers & Vaccines



WON'T TRAVEL WITHOUT VACCINE

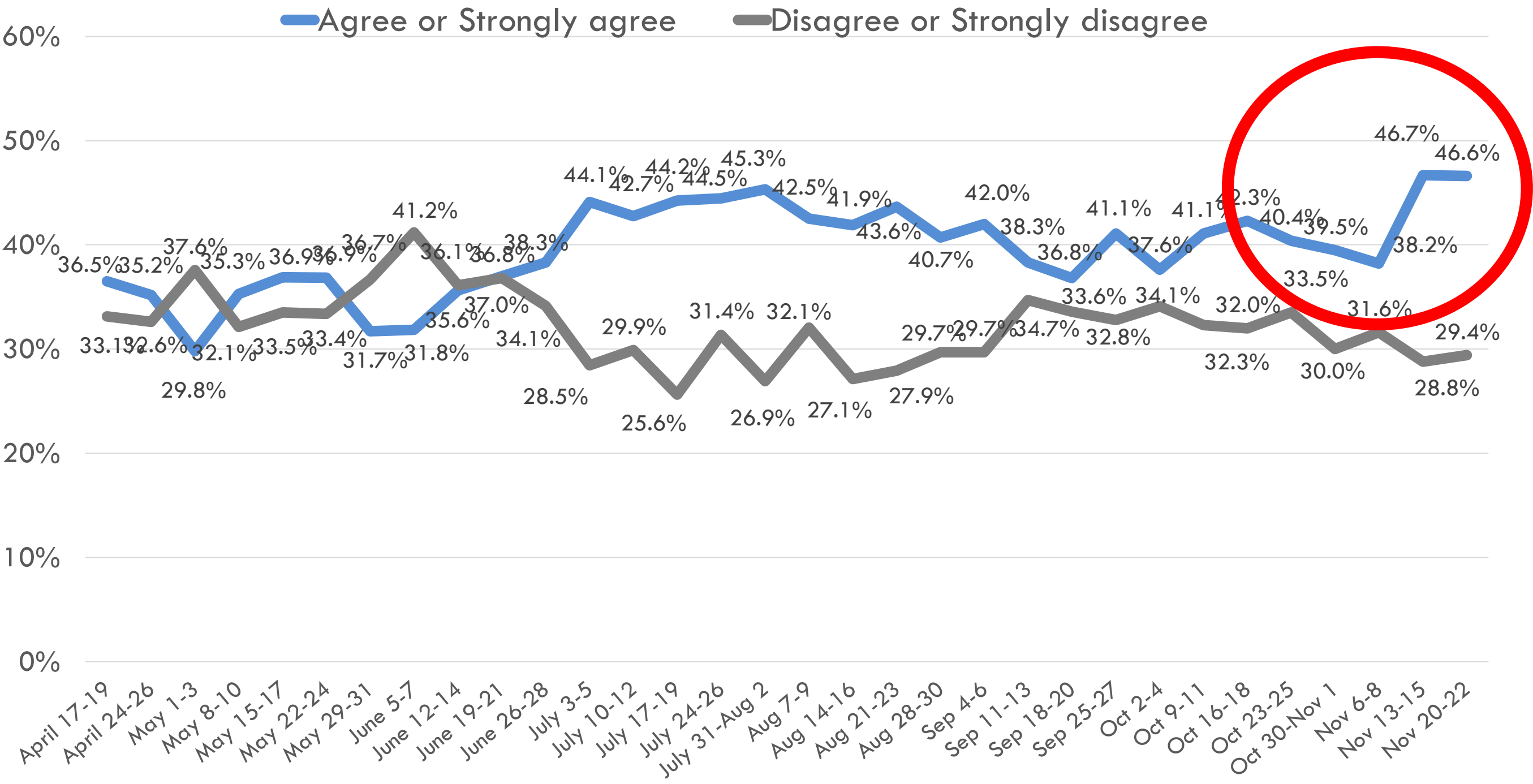
How much do you agree with the following statement?

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



(Base: Waves 6-37. 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, 1,206 and 1,205 completed surveys.

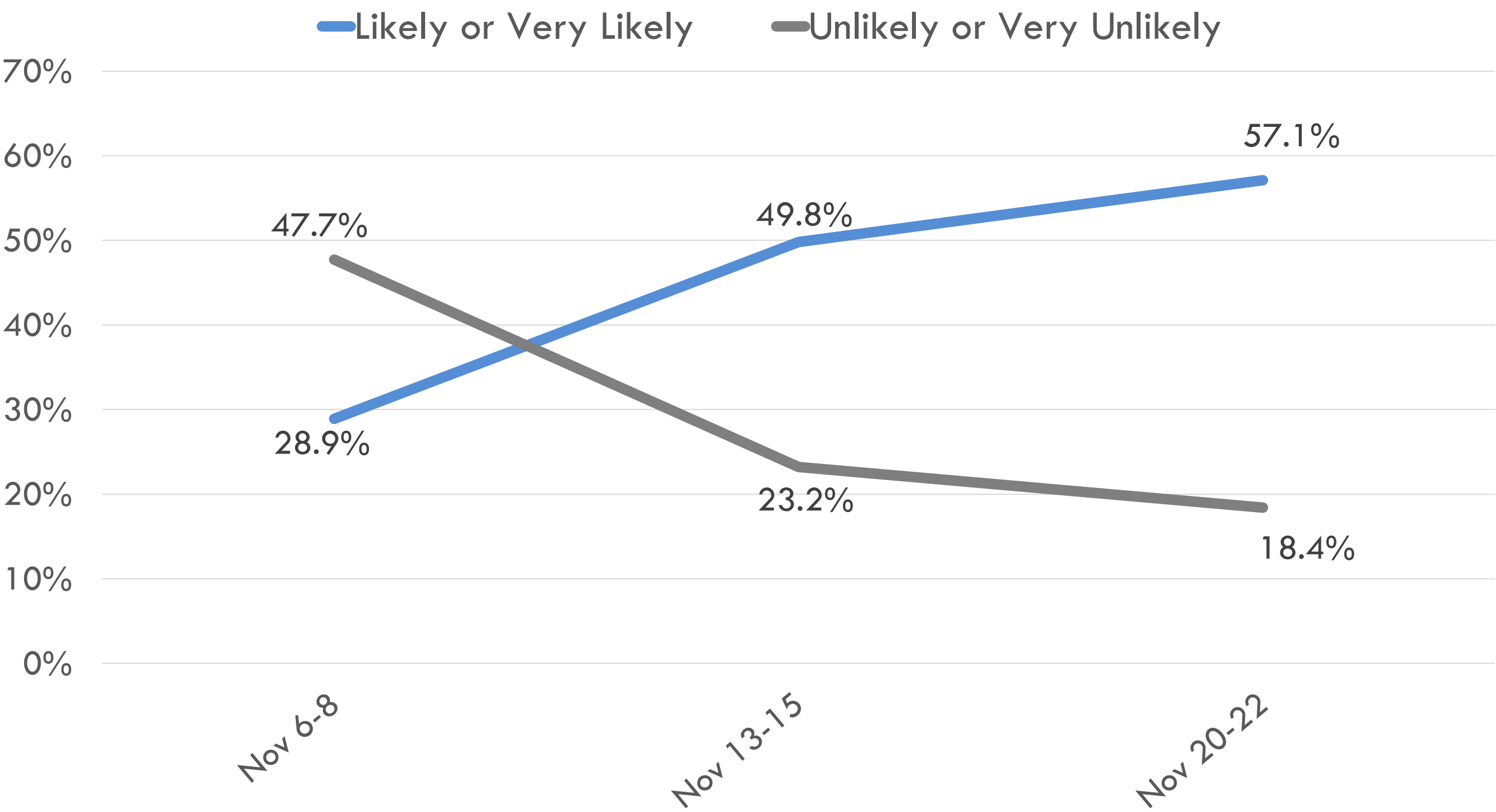
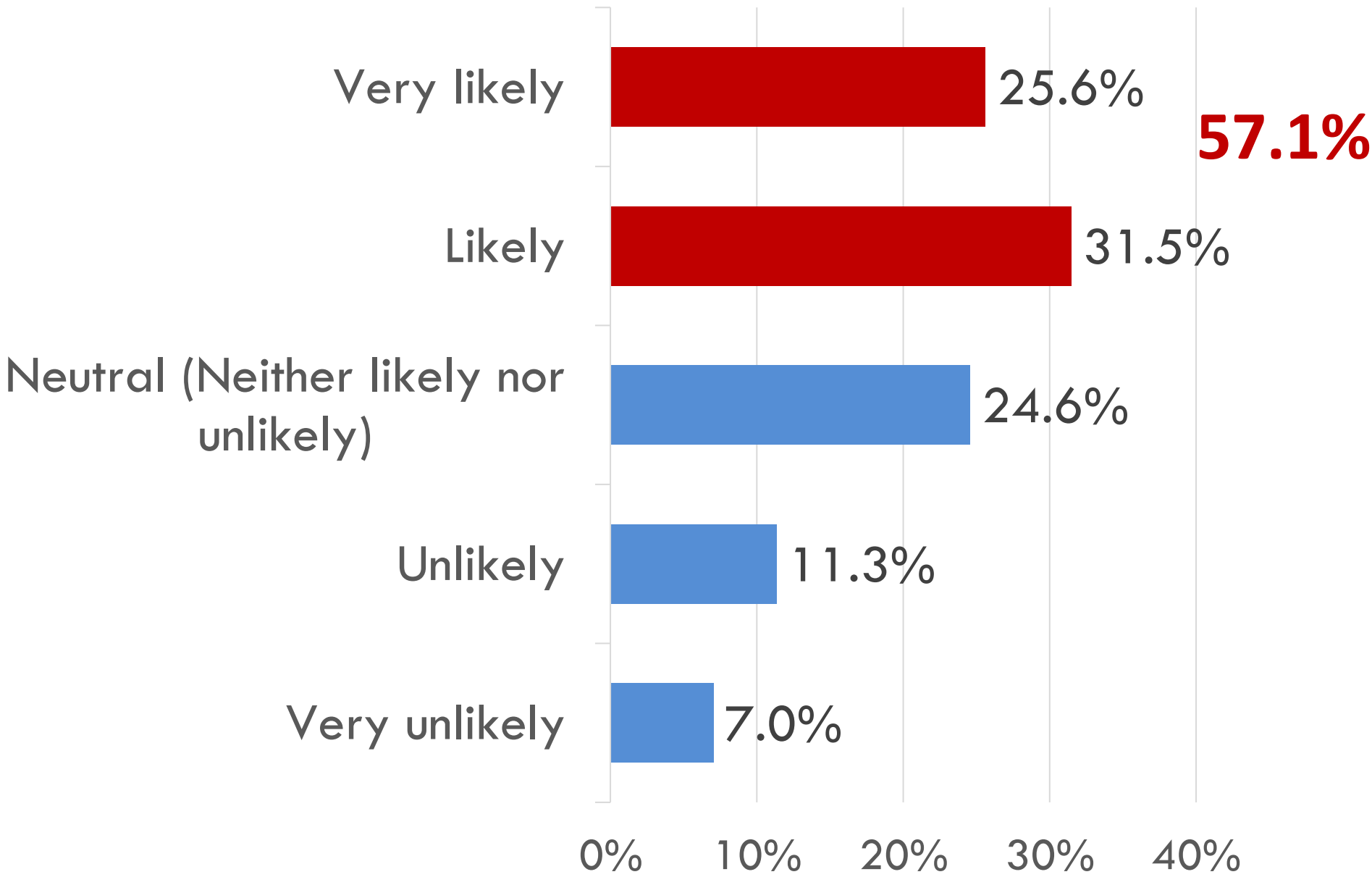
Historical data



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



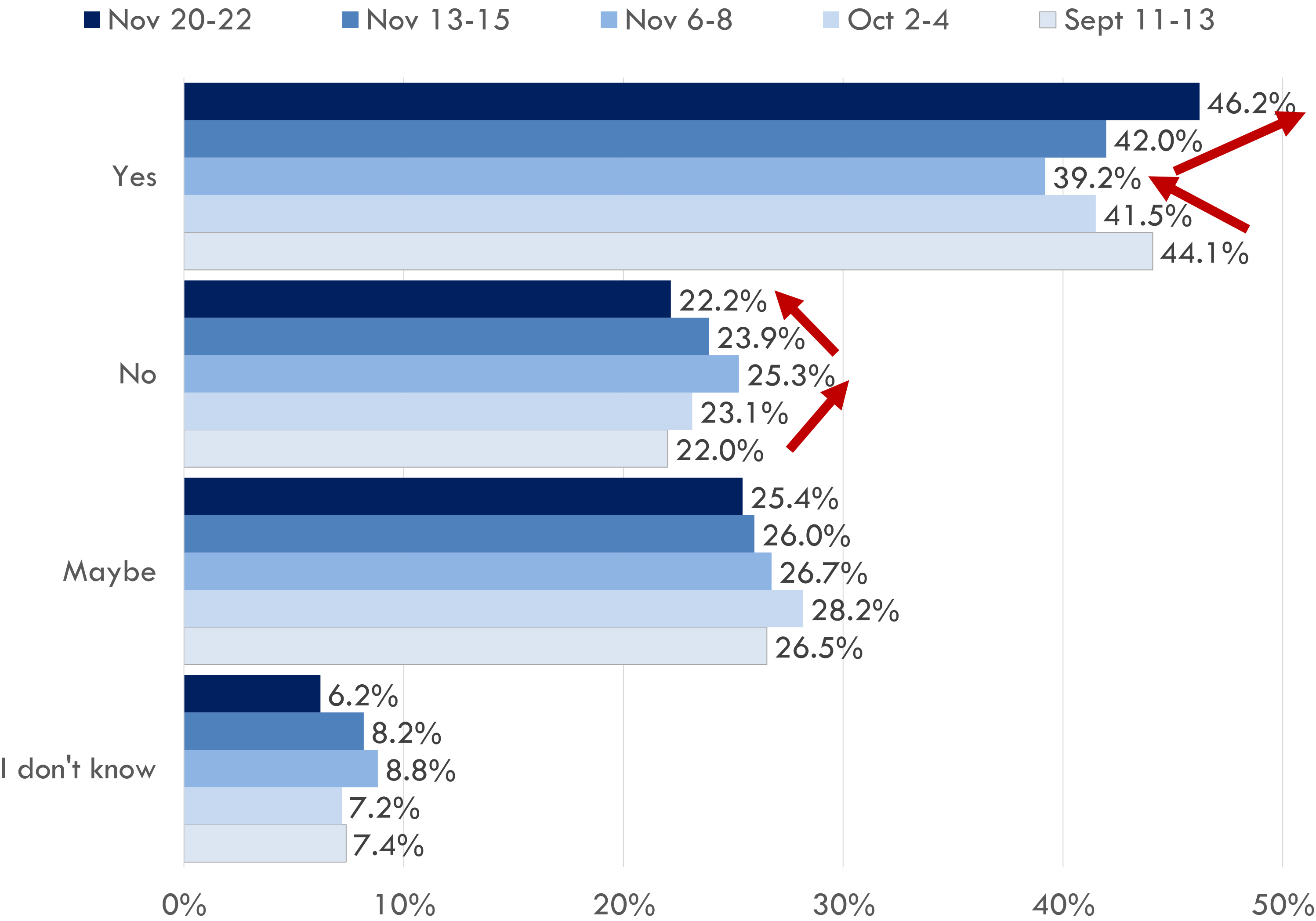
(Base: Wave 35-37 data. All respondents, 1,205, 1,206 and 1,205 completed surveys.)

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 35-37 data. All respondents, 1,205, 1,203, 1,205, 1,206 and 1,205 completed surveys.)

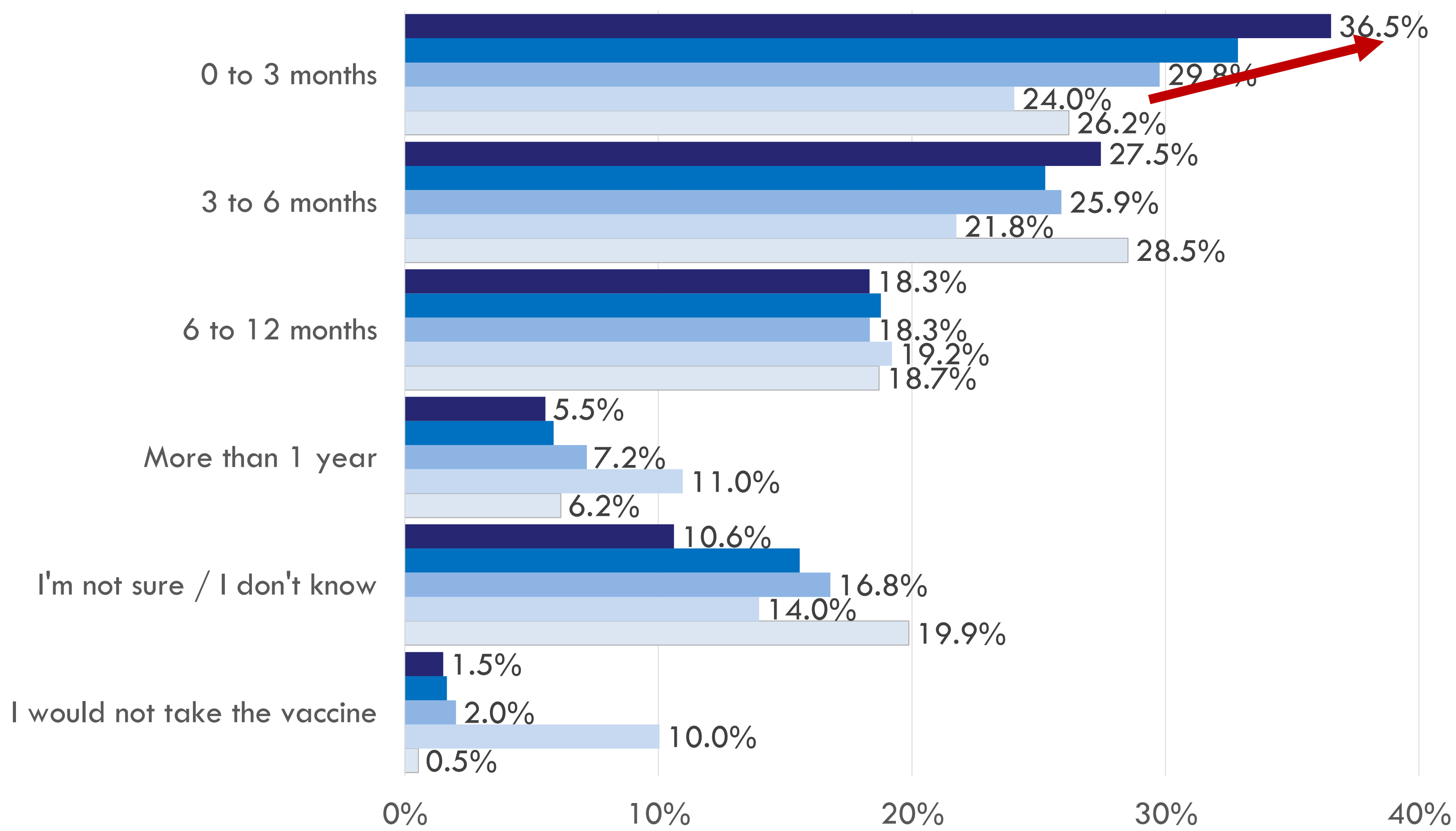


HOW LONG BEFORE TAKING A VACCINE

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

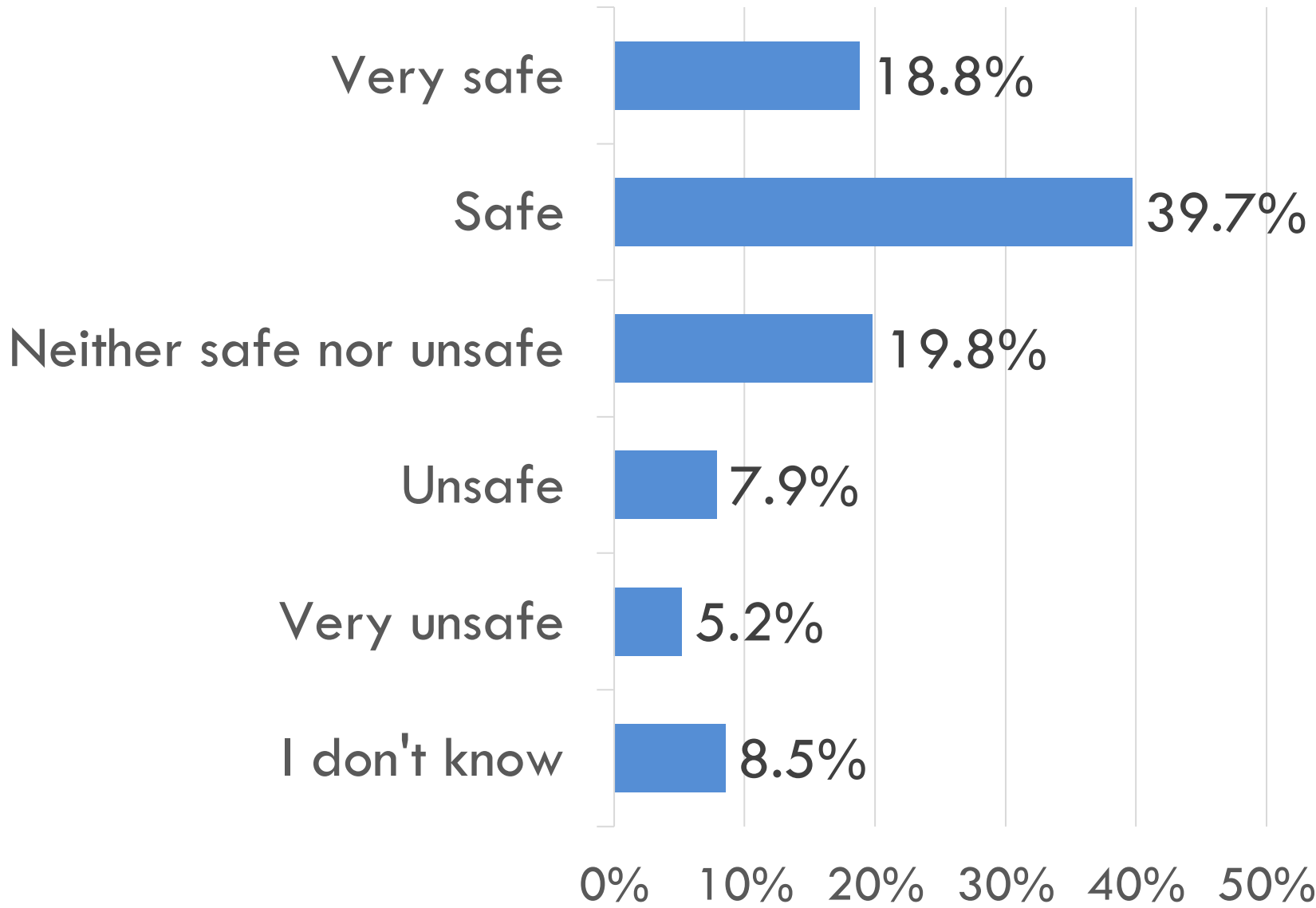
(Base: Wave 27, 30 and 35-37 data.
Respondents who will or maybe take the vaccine,
946, 1,203, 909, 952 and 950 completed
surveys.)

■ November 20-22 ■ November 13-15 ■ November 6-8 ■ October 2-4 ■ September 11-13



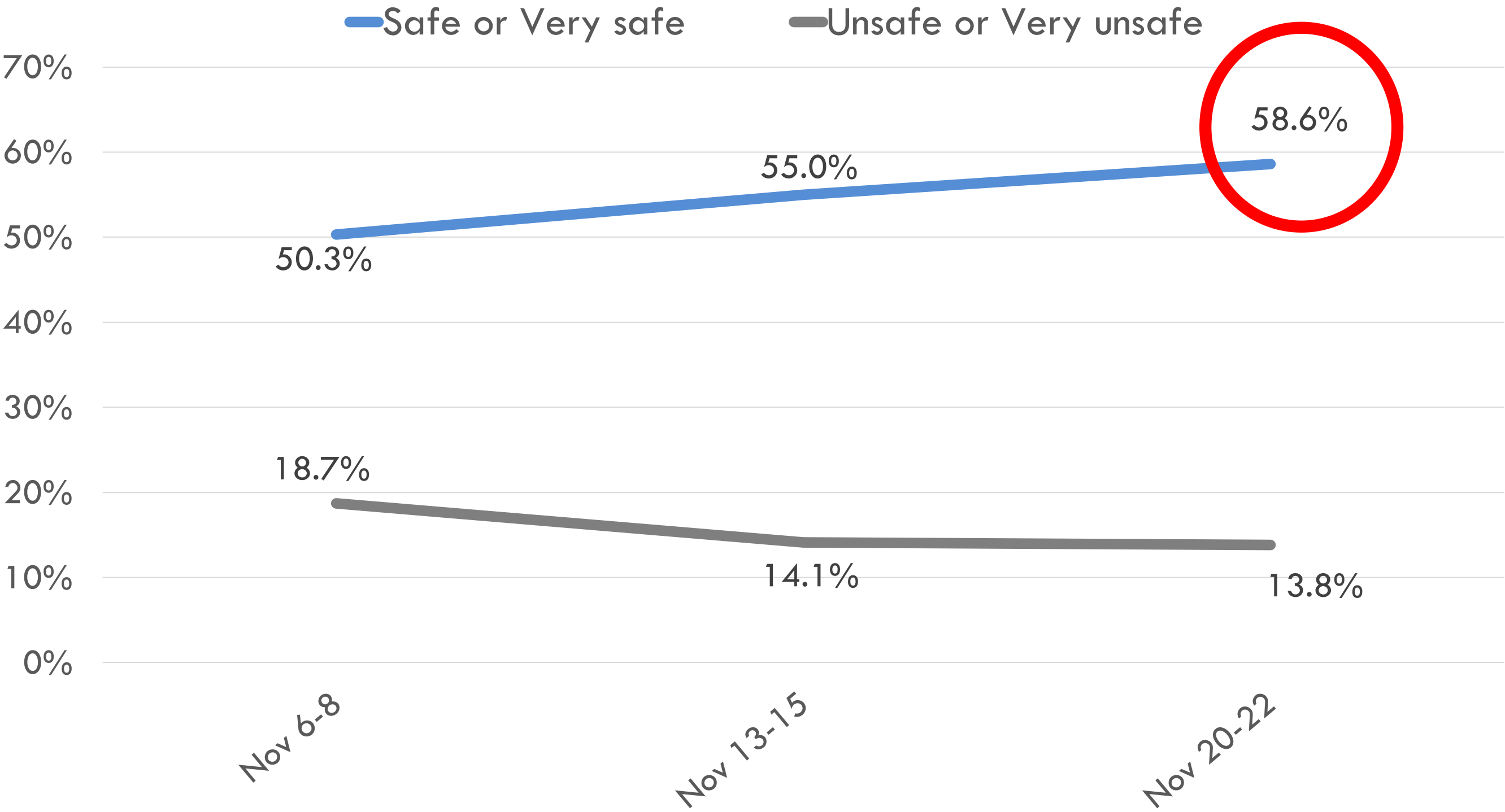
SAFETY OF COVID-19 VACCINES

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



(Base: Wave 35-37 data. All respondents, 1,205, 1,206 and 1,205 completed surveys.)

Historical data

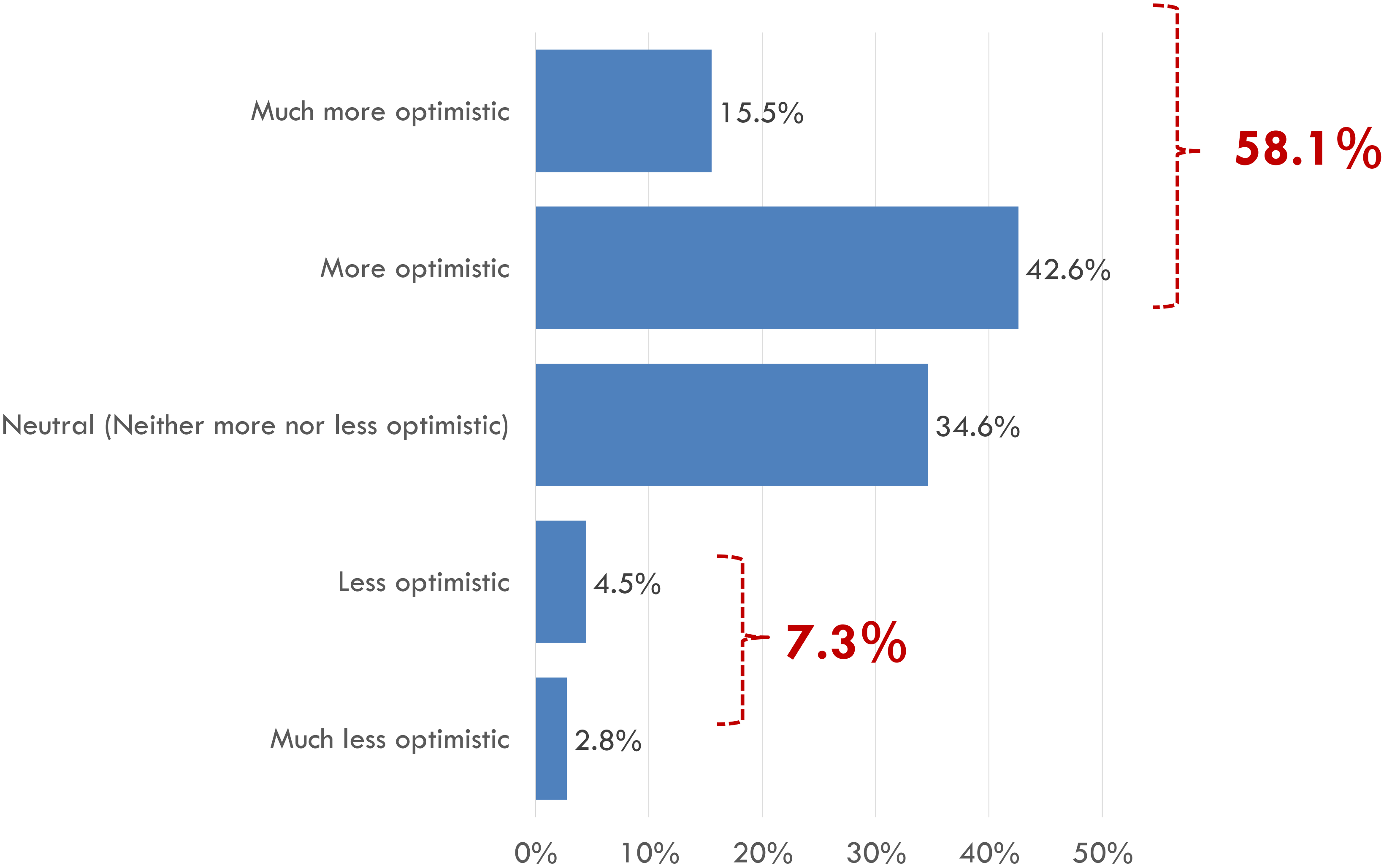


VACCINES AND EXPECTED RETURN TO NORMALCY

Question: Does recent news about vaccine developments affect your optimism about life returning to normal (or near normal) in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about life returning to normal (or near normal) in the next six months.

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

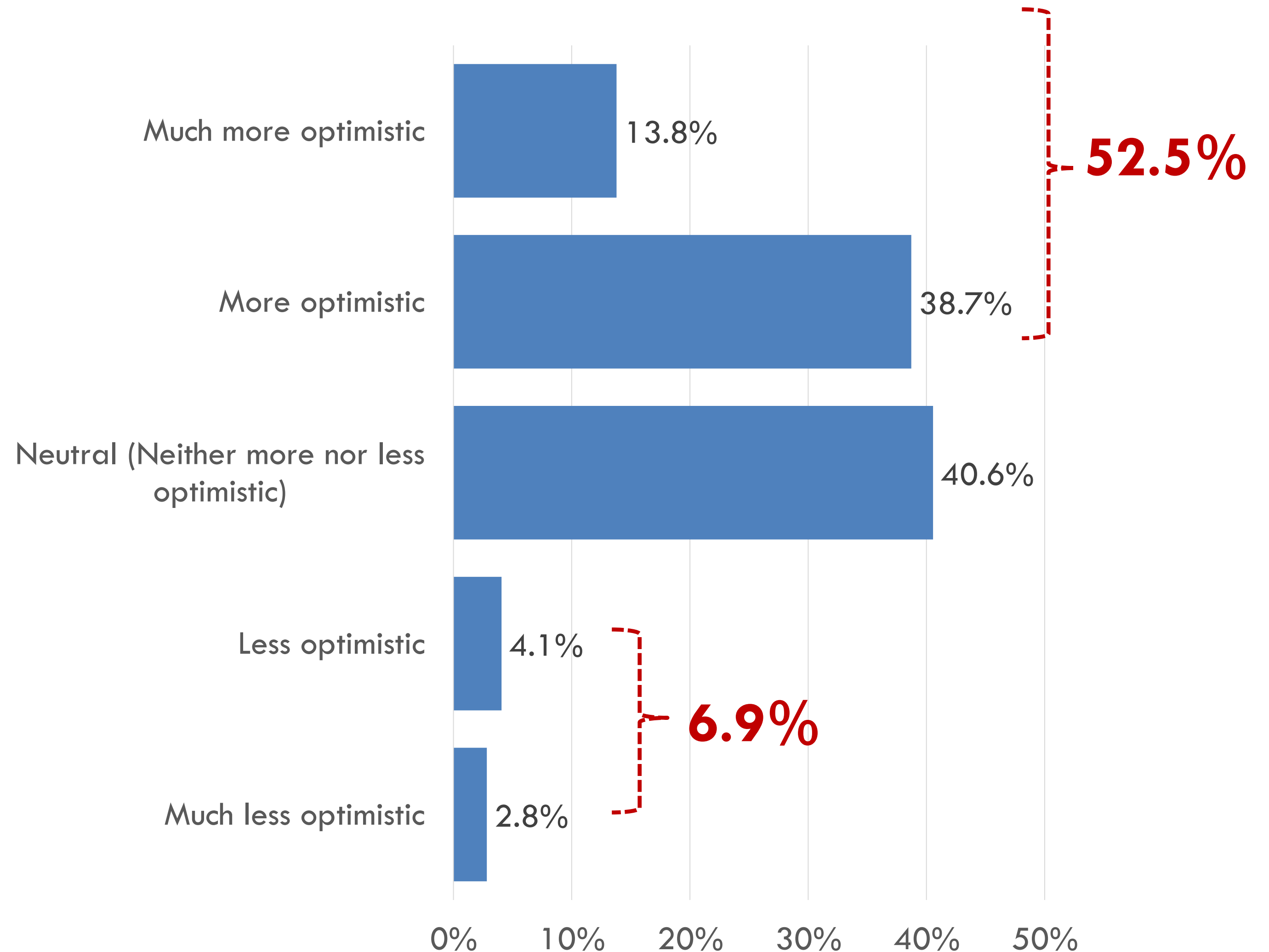


VACCINES AND EXPECTED RETURN TO TRAVEL SAFETY

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: Wave 37 data. All respondents,
1,205 completed surveys. Data collected
November 20-22, 2020)



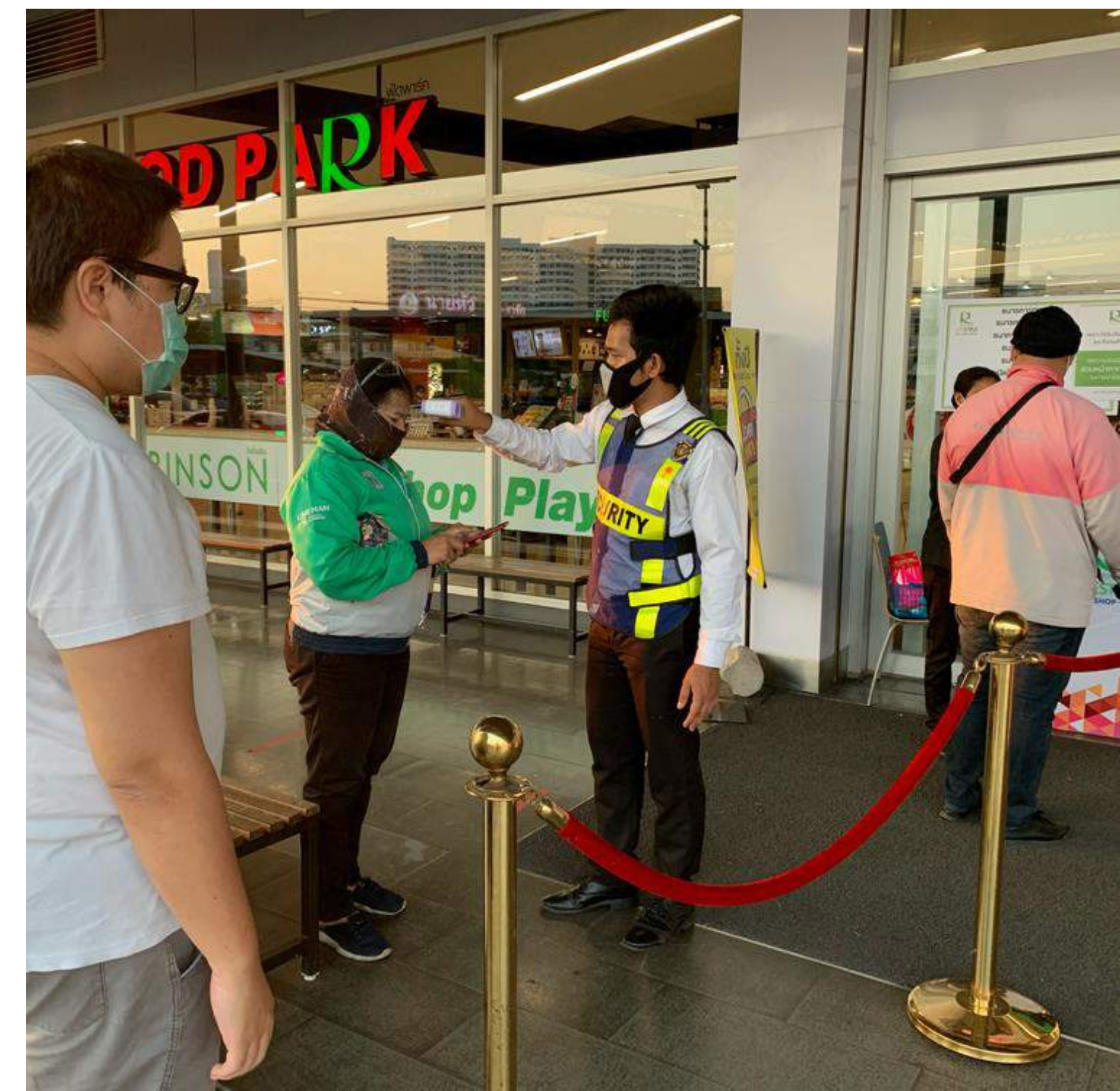
Key Takeaways

1. The proportion of travelers saying they won't travel without a vaccine is at a pandemic high
2. Optimism that a vaccine will be ready by year end is quickly growing, as is its perceived safety
3. Traveler willingness to take a vaccine is improving but still problematic
4. Recent news about successes in vaccine development have buoyed optimism about a return to normalcy in the upcoming six months

The First Word You See is Where You're Going in December



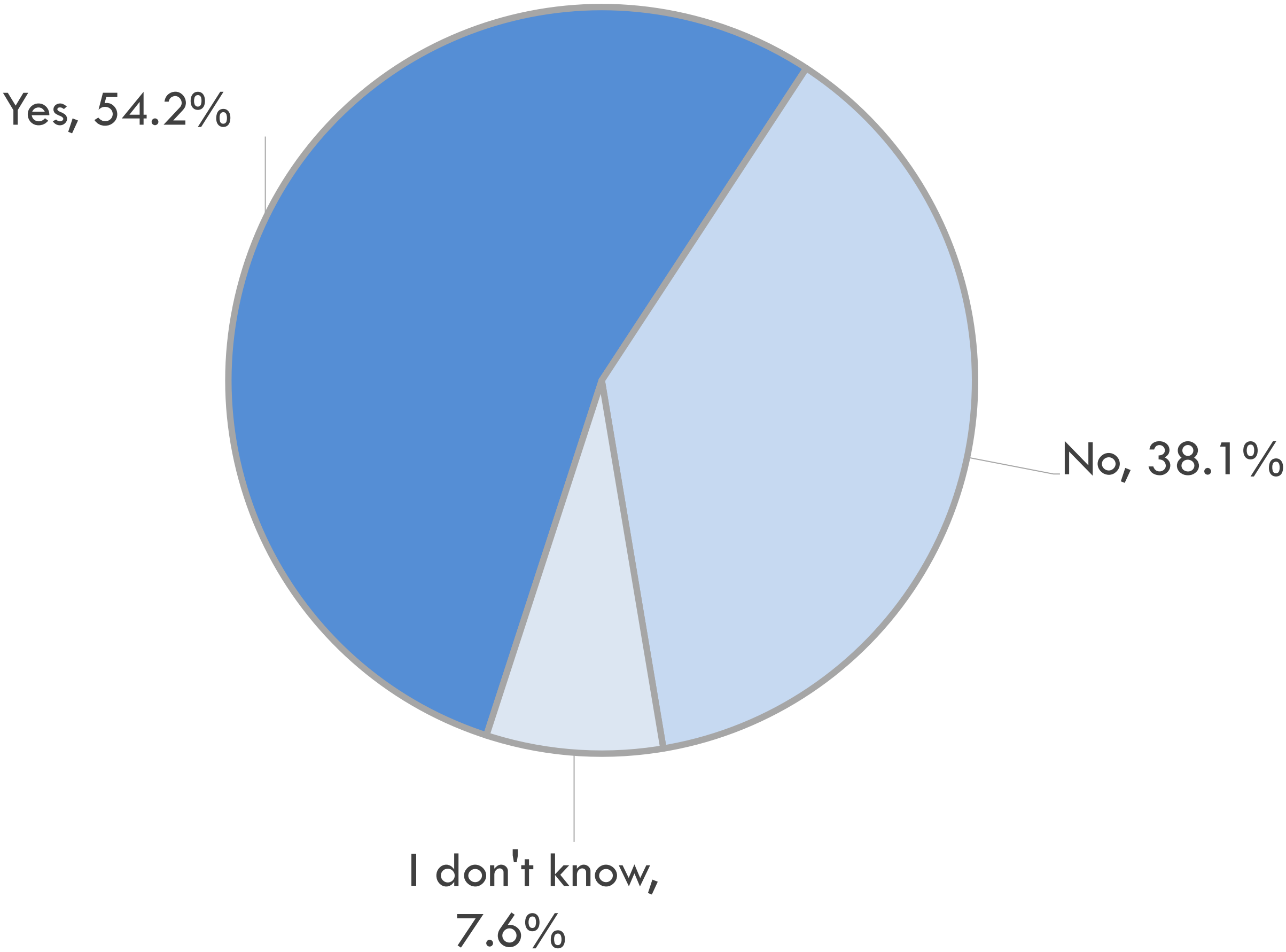
Covid-19 Regulations



INCREASES IN LOCAL COVID-19 RELATED RESTRICTIONS

Question: In the PAST TWO (2) WEEKS, has the community where you live instituted more restrictive COVID-19 rules?

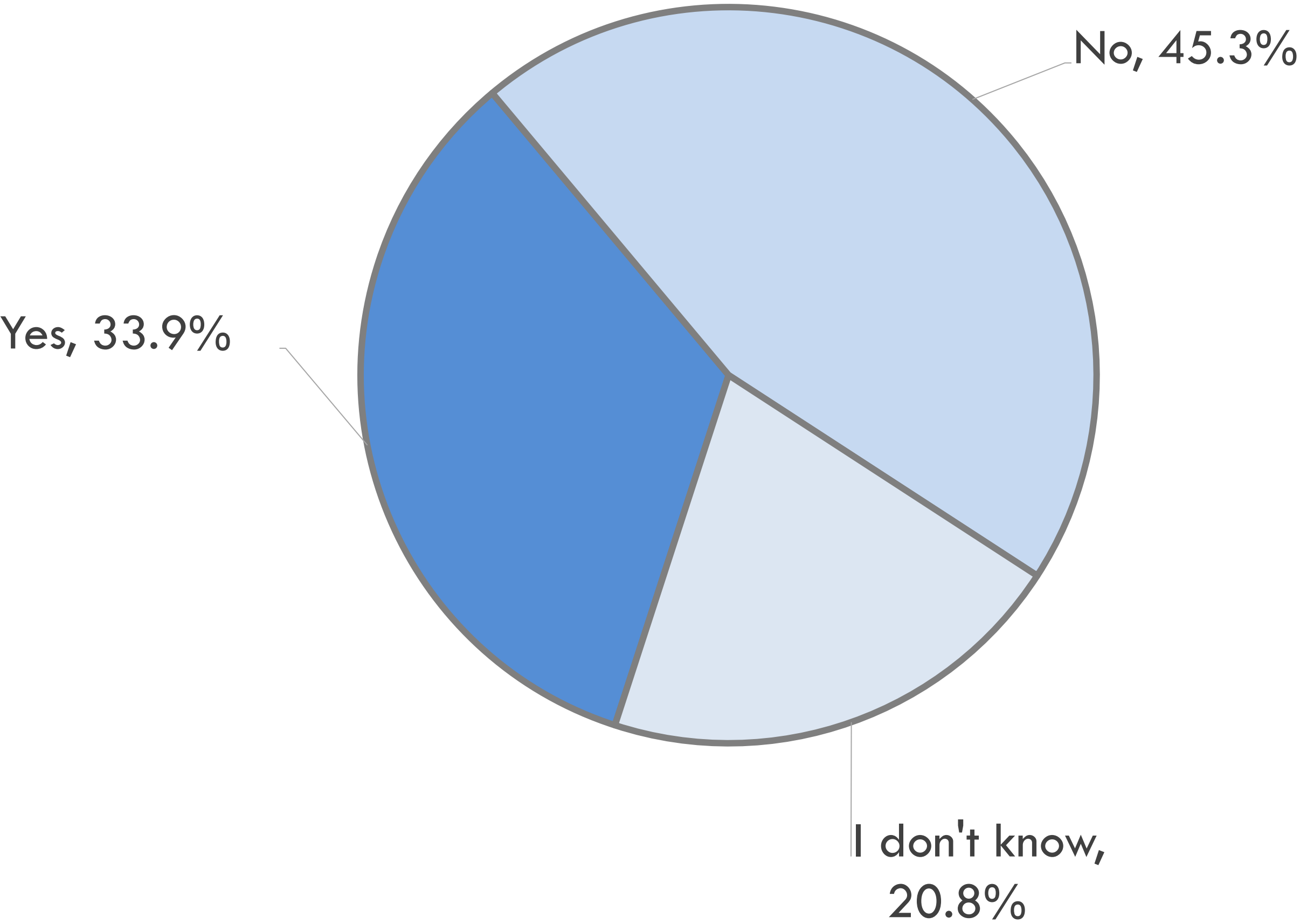
(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)



STATE IMPOSITION ON NEW TRAVEL RESTRICTIONS

Question: To the best of your knowledge, has the state where you reside **IMPOSED ANY NEW TRAVEL RESTRICTIONS** in the past month? (Select one)

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

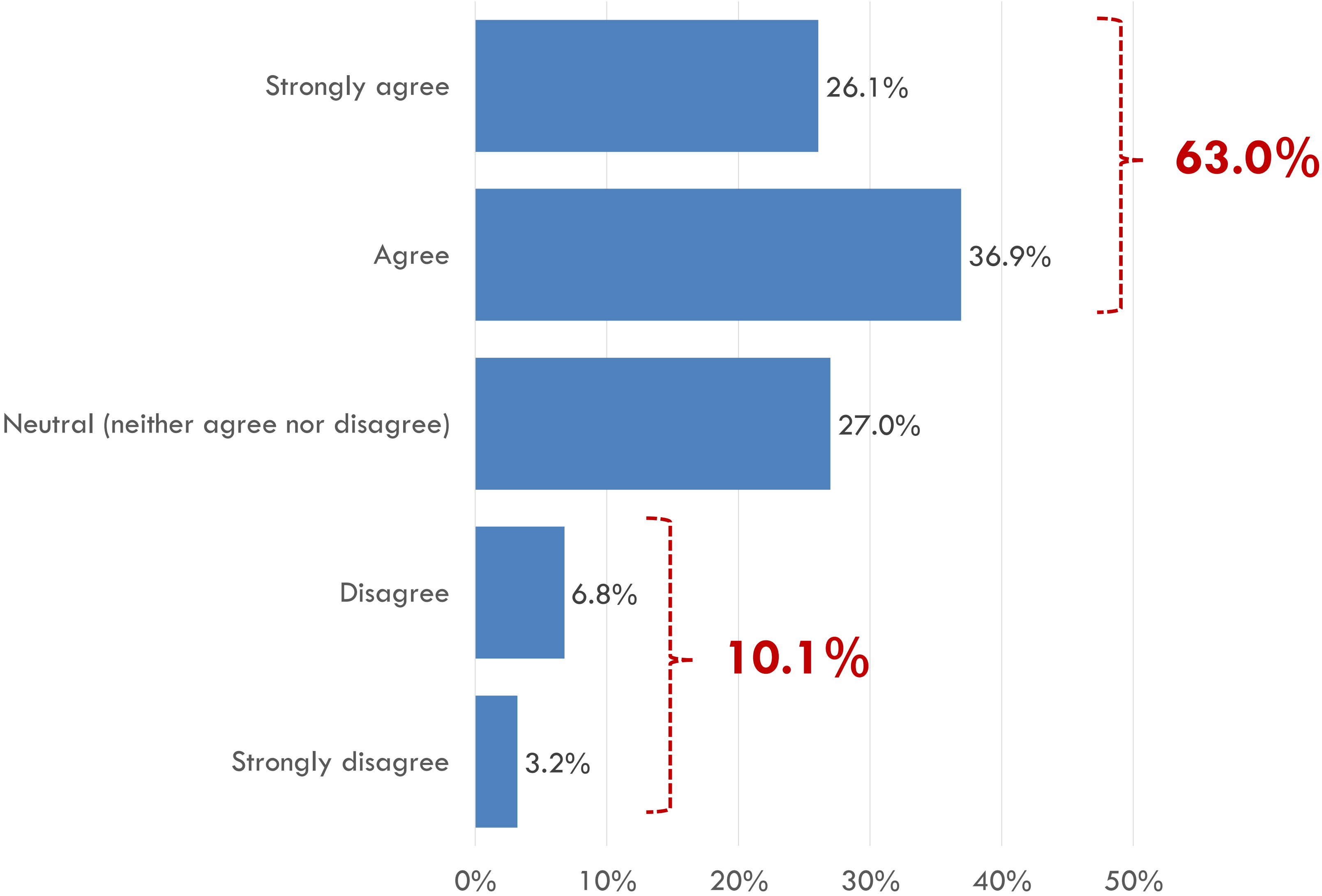


LIKELIHOOD OF MORE RESTRICTIVE COVID-19 RULES

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

The community where I live is **LIKELY** to implement more restrictive COVID-19 rules soon.

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

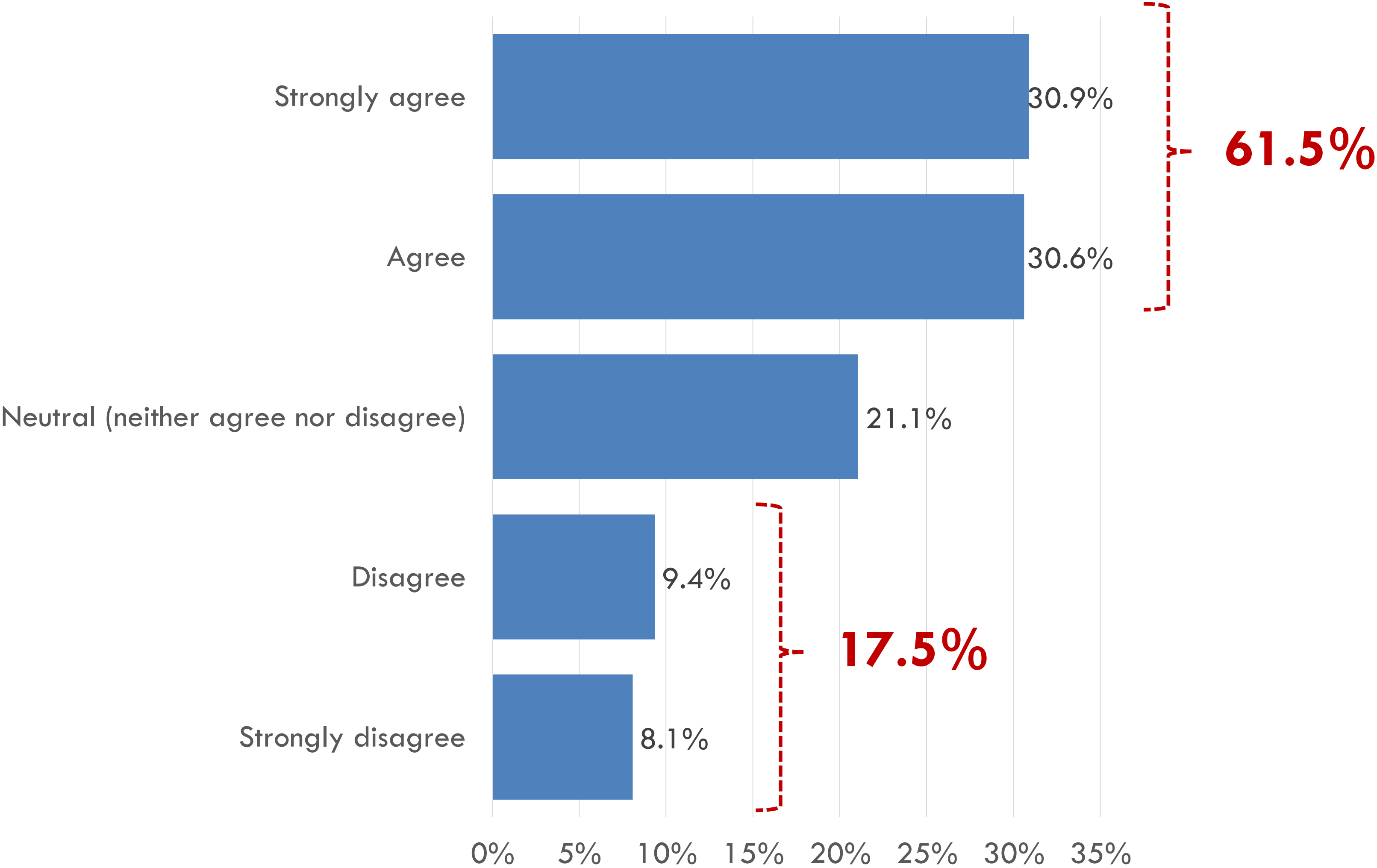


SUPPORT FOR MORE RESTRICTIVE COVID-19 RULES

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

I support more restrictive COVID-19 rules being implemented in my home community.

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

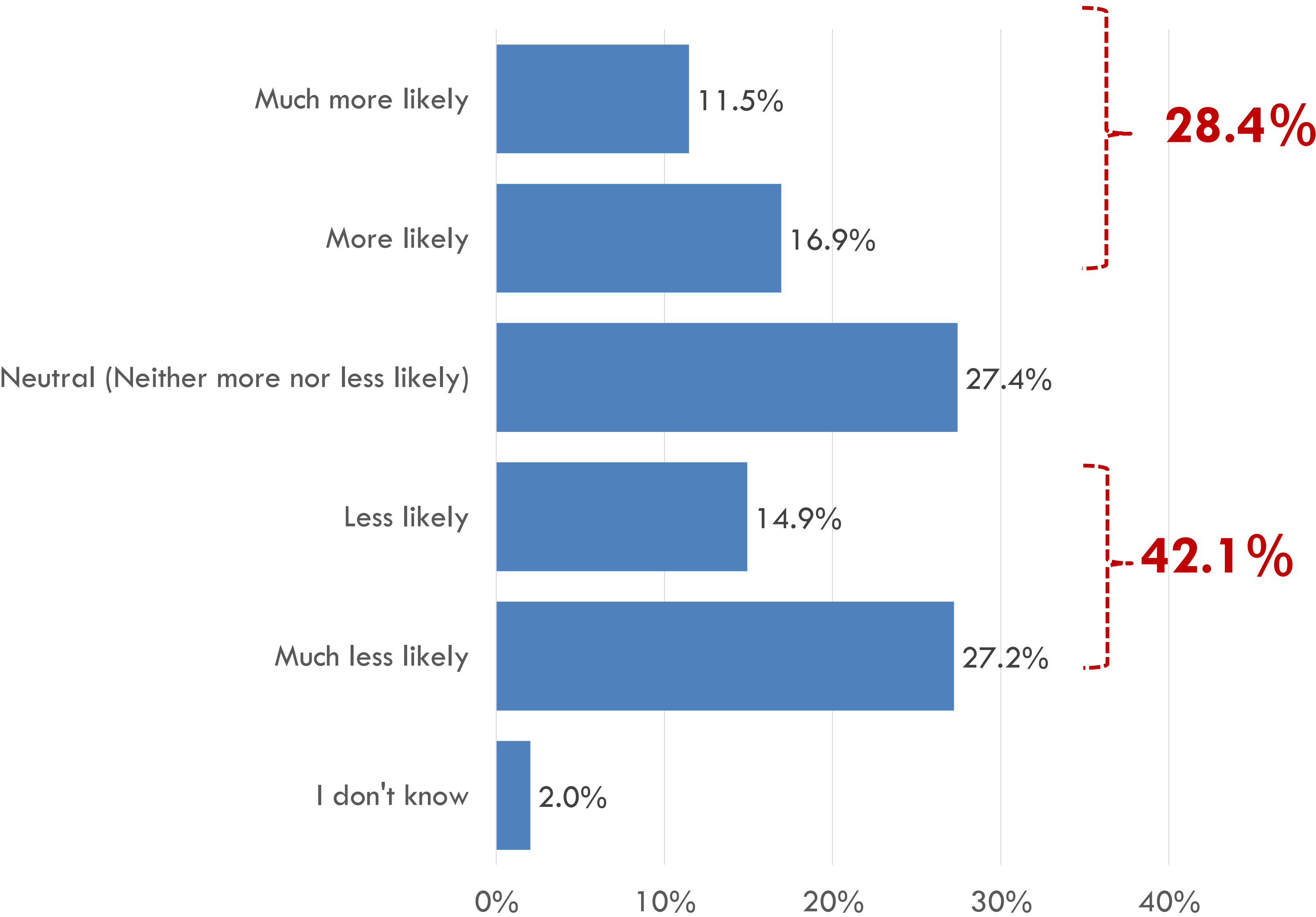


RESTRICTIONS AND EFFECT ON LIKELIHOOD OF TRAVEL

Question: Do these new restrictions affect the likelihood that you will travel in the next TWO (2) MONTHS? (Select one to fill in the blank)

The new restrictions make me _____ to travel.

(Base: Wave 37 data. Respondents living in states with new restrictions, 452 completed surveys. Data collected November 20-22, 2020)

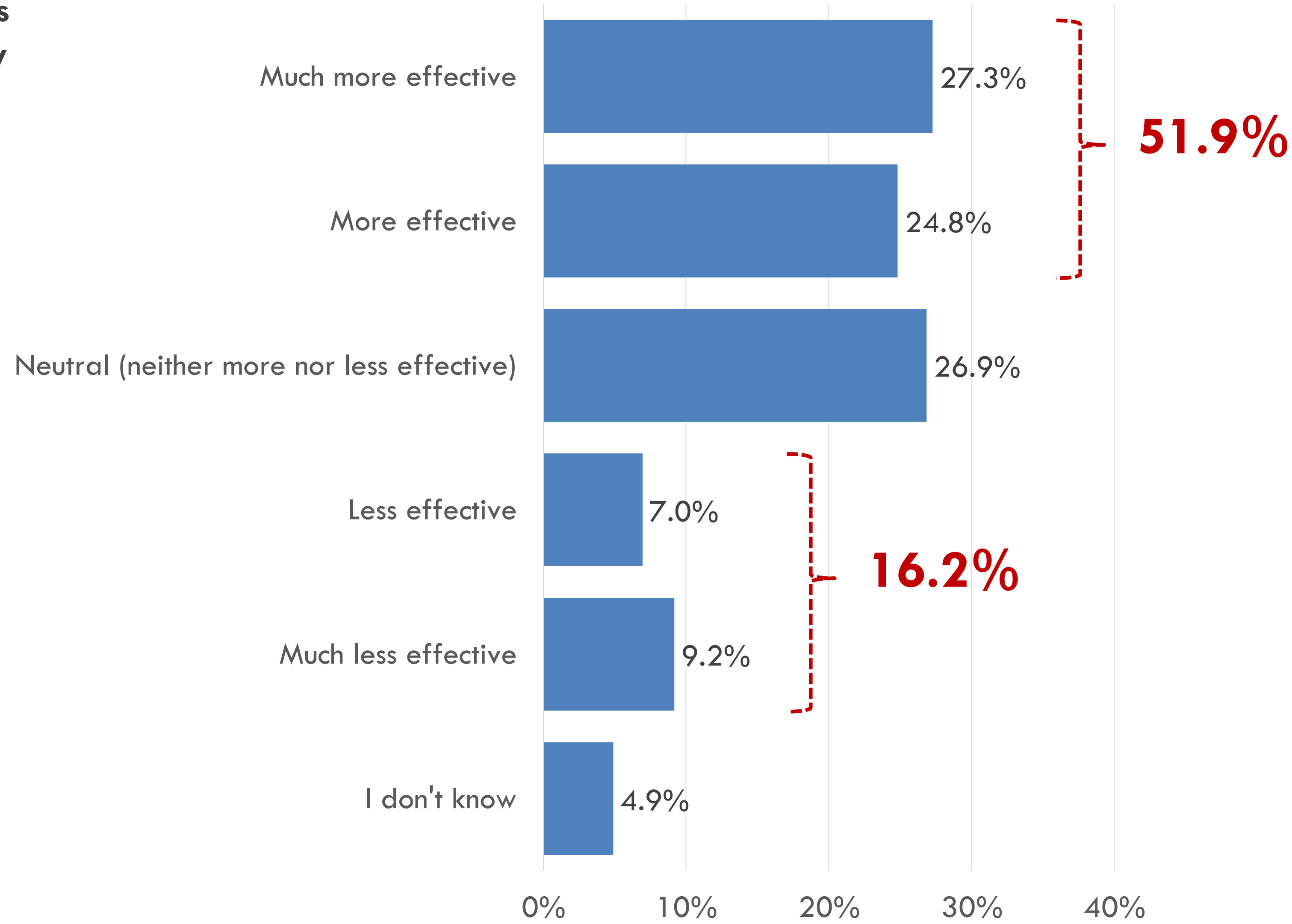


CHANGE IN PRESIDENTIAL ADMINISTRATIONS

Question: Will the upcoming change in the nation's Presidential administration lead to changes in how effectively the country manages the COVID-19 situation? (Select one the fill in the blank)

A change in administration will lead to _____ management of the COVID-19 situation.

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)



Key Takeaways

1. Travelers are feeling the weight of new restrictions at the local and state levels, with most expecting more to come.
2. Support for these restrictions, while not universal is high
3. Covid restrictions appear to have offsetting effects on travel sentiment, with some feeling it will spur travel, other feeling it will diminish the likelihood they will travel



If 2020 was an Ice Cream truck

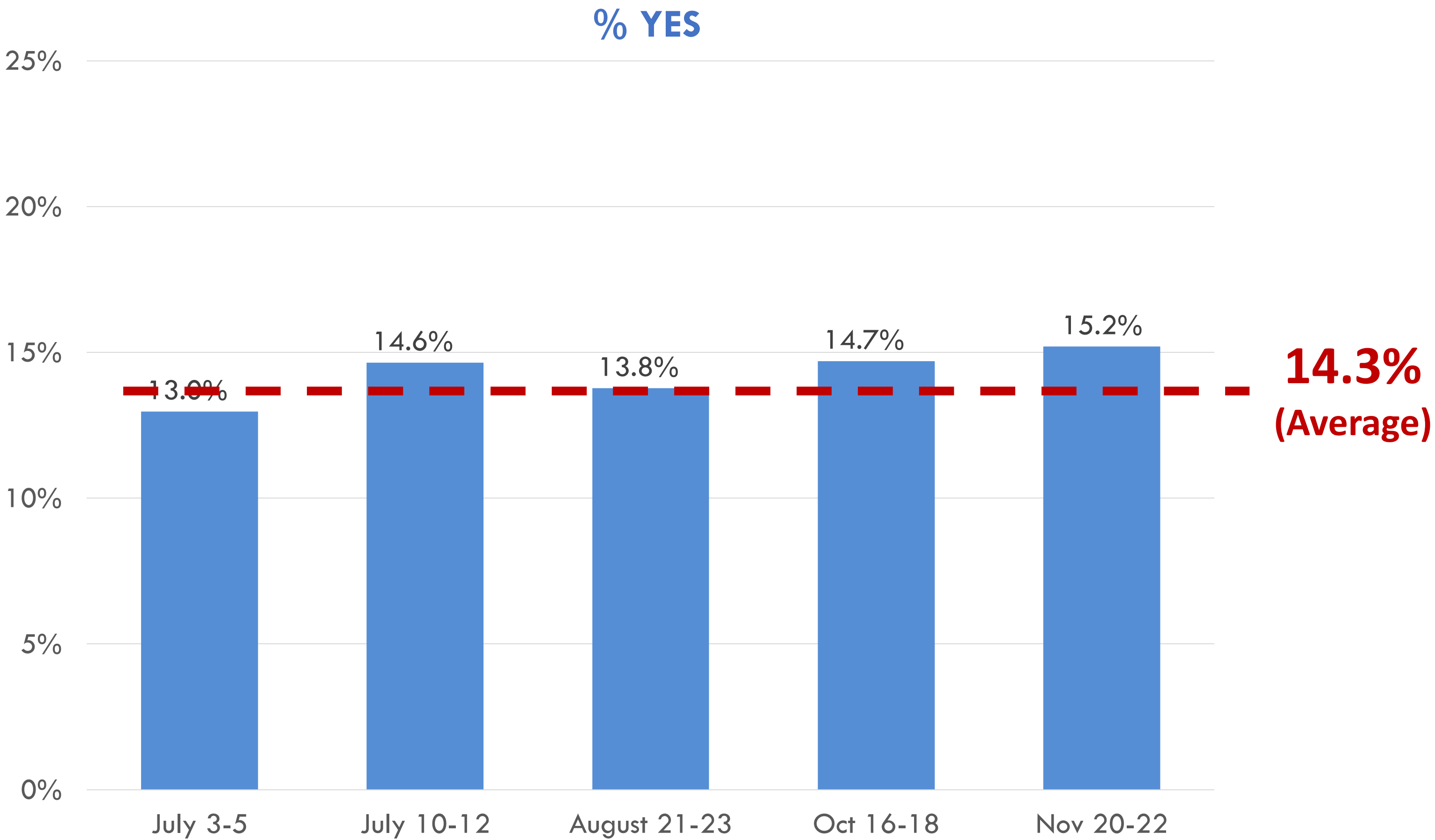
Ski Season



SKI OR SNOWBOARD VACATION (PAST 3 YEARS)

Question: Have you taken an overnight ski or snowboard vacation in the past three (3) years?

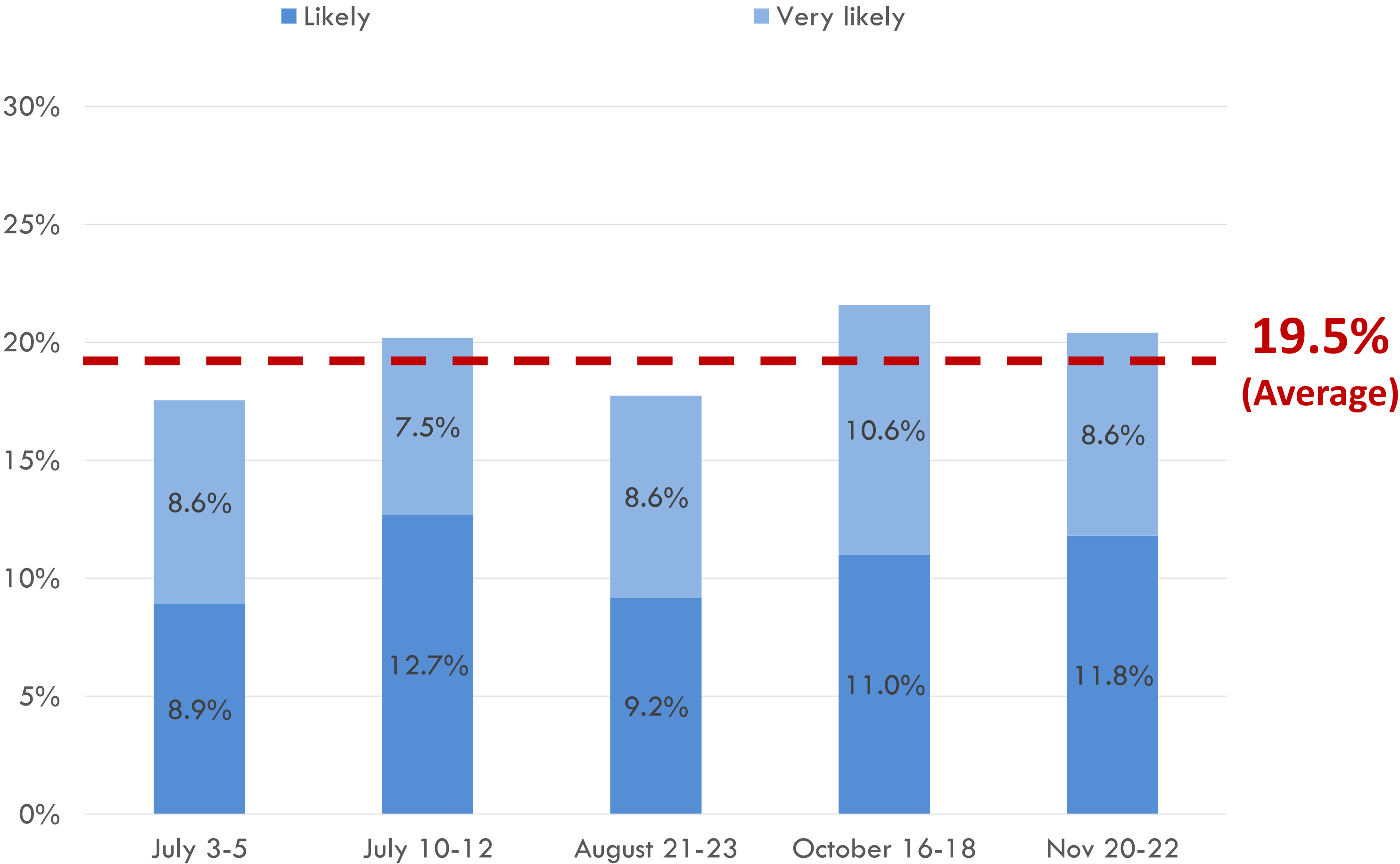
(Base: Waves 17, 18, 24, 32 and 37. All respondents, 1,365, 1,213, 1,207, 1,204 and 1,205 completed surveys.)



LIKELIHOOD OF TAKING A SKI/SNOWBOARD VACATION (NEXT 3 YEARS)

Question: How likely are you to take an overnight ski or snowboard vacation in the NEXT THREE (3) YEARS?

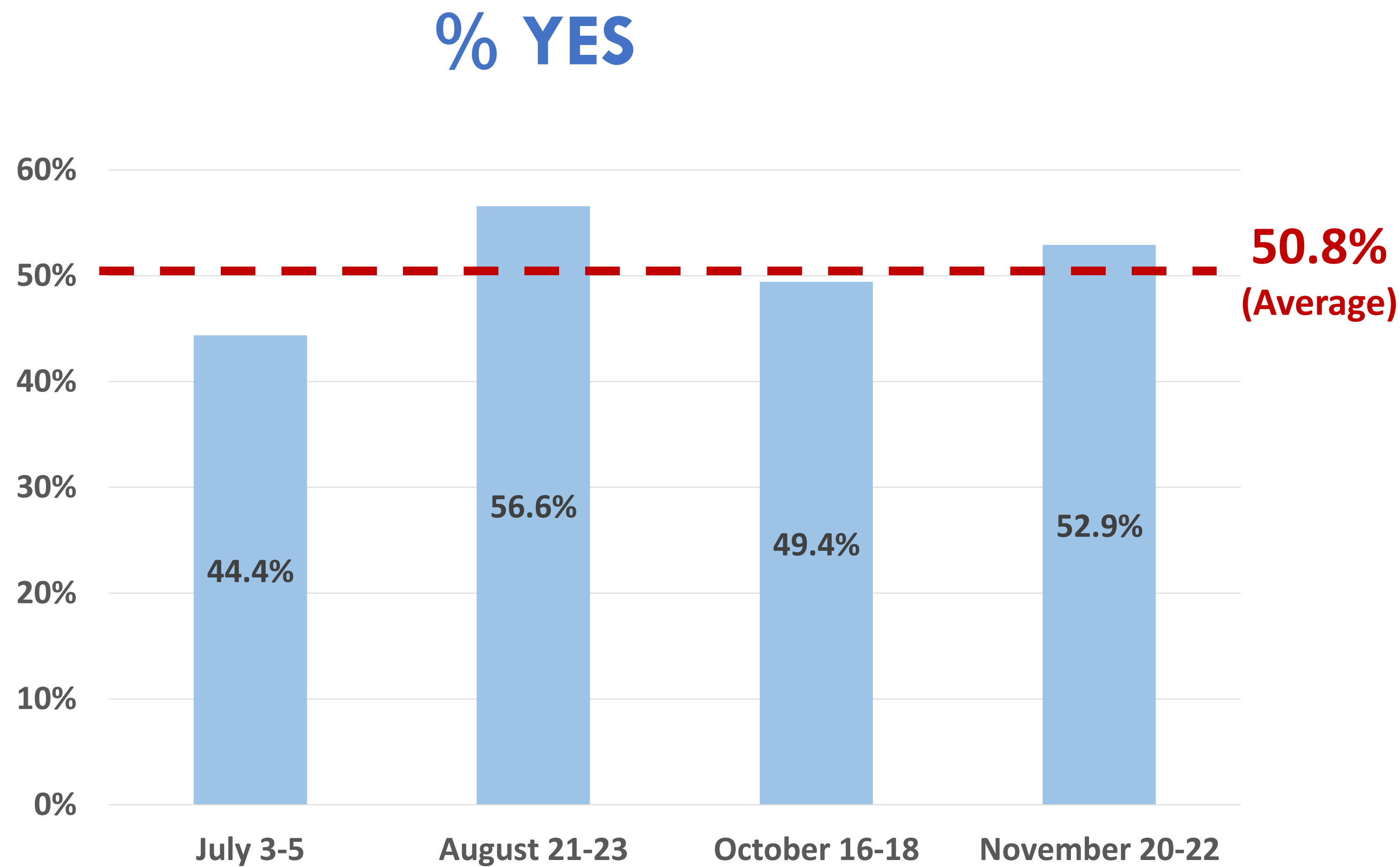
(Base: Waves 17, 18, 24, 32 and 37. All respondents, 1,365, 1,213, 1,207, 1,204 and 1,205 completed surveys.)



REGULARLY VISITED SKI/SNOWBOARD DESTINATIONS

Question: Is there a specific destination you regularly visit on overnight ski/snowboard-related trips?

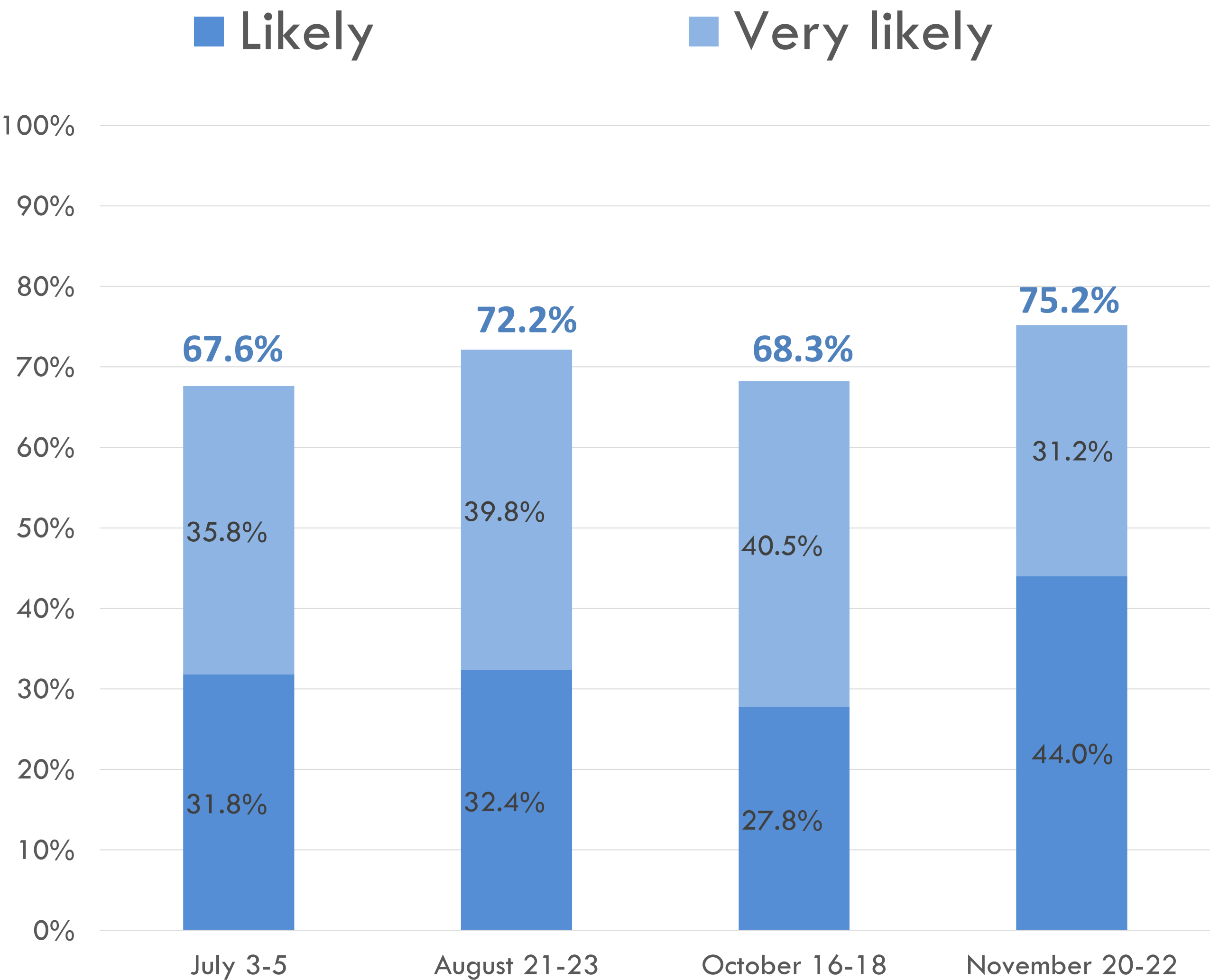
(Base: Waves 17, 24, 32 and 37.
Respondents likely to take a ski trip in next
3 years, 206, 188, 203 and 210
completed surveys.)



LIKELIHOOD TO RETURN THIS SEASON (REGULAR SKI/SNOWBOARD DESTINATION)

Question: How likely are you to take an overnight ski/snowboard-related trip to that destination next season (Winter 2020/2021)?

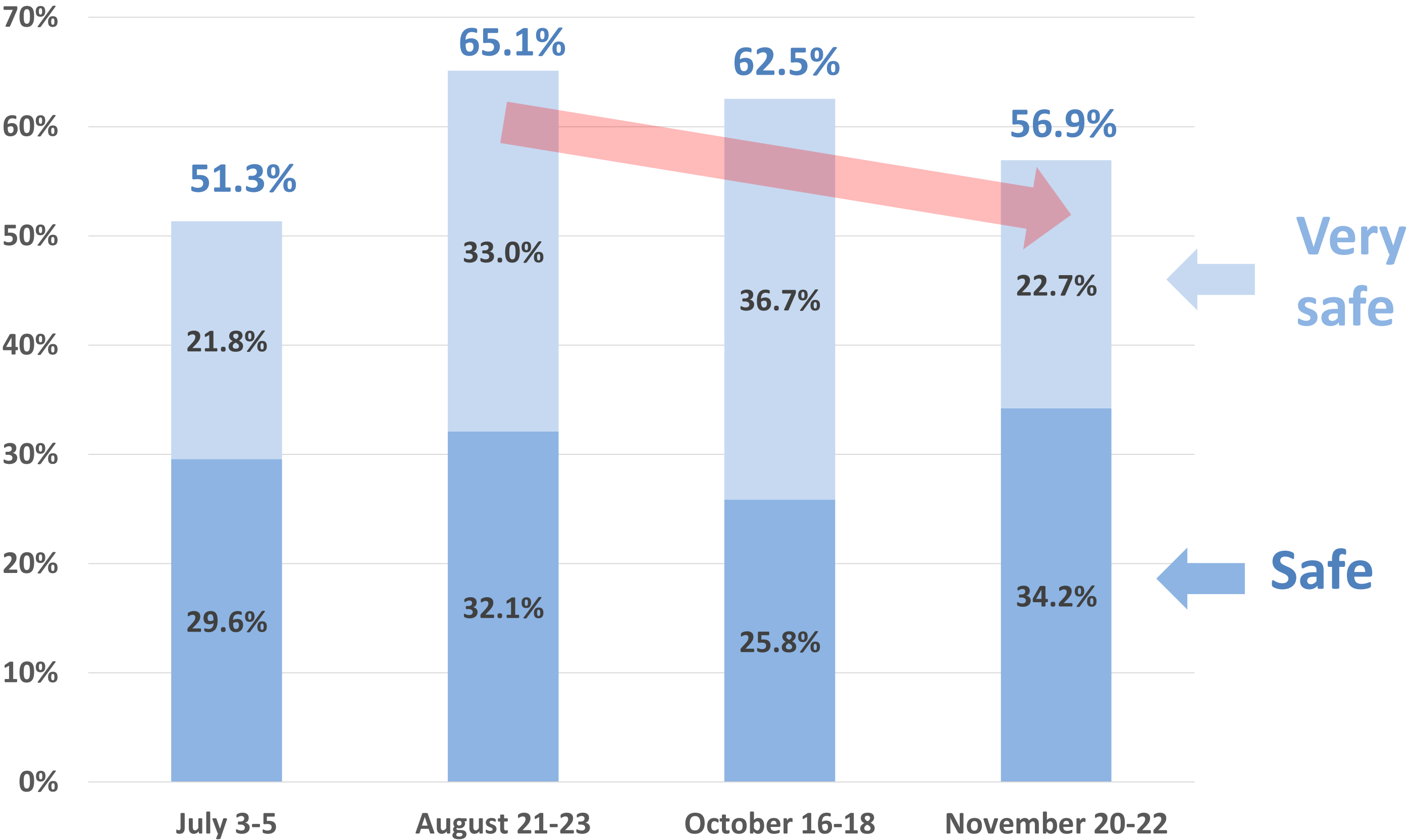
(Base: Waves 17, 24, 32 and 37 data. Respondents who have a regular ski destination they visit, 134, 150, 139 and 127 completed surveys.)



PERCEIVED SAFETY OF A SKI/SNOWBOARD VACATION (THIS SEASON)

Question: At this moment, how safe would you feel taking a ski/snowboard vacation next season (Winter 2020/2021)?

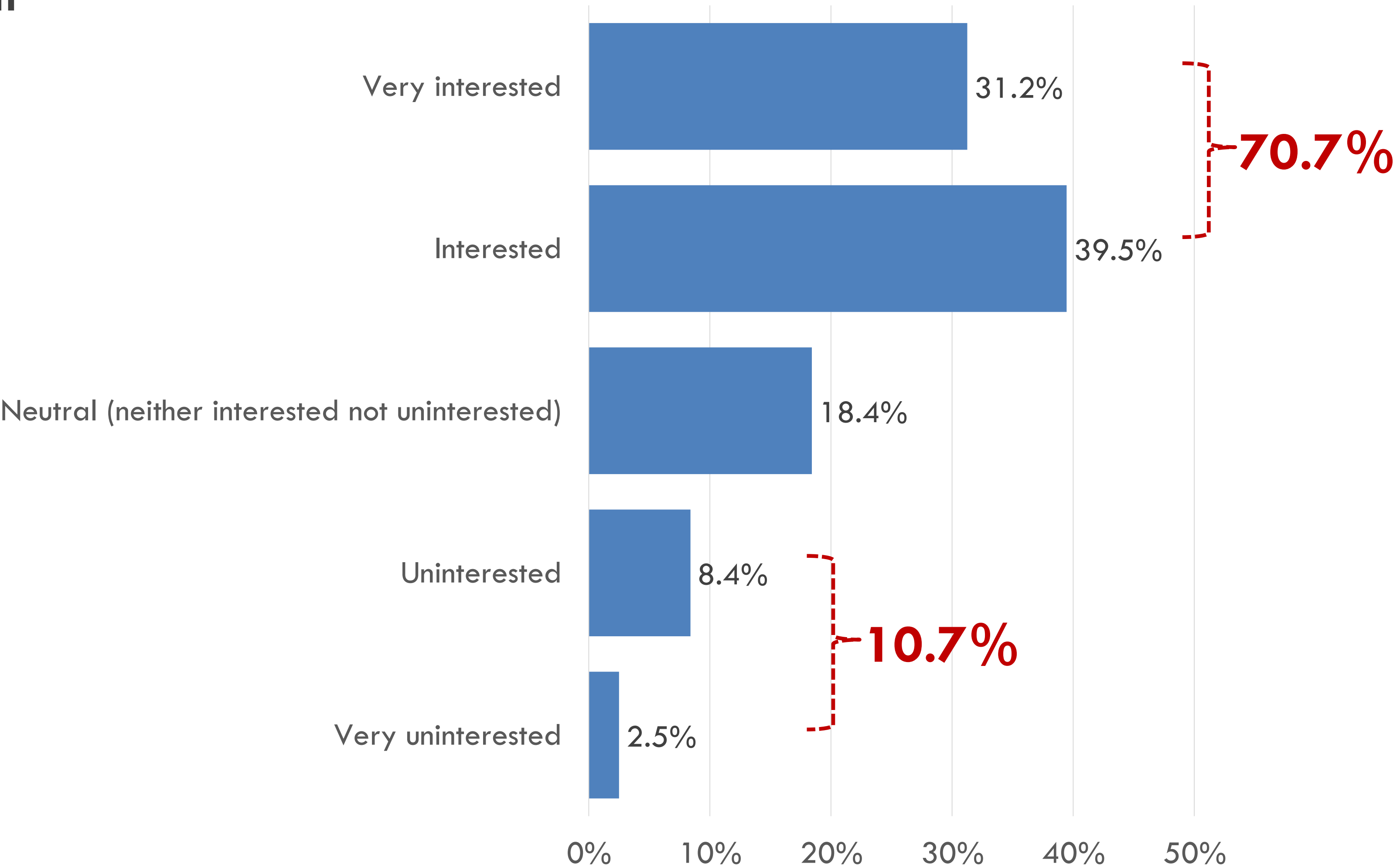
(Base: Waves 17, 24, 32 and 37.
Respondents likely to take a ski trip in next
3 years, 206, 188, 203 and 210
completed surveys.)



INTEREST IN NEW SKI/SNOWBOARD DESTINATIONS THIS SEASON

Question: How interested are you in visiting new ski/snowboard destinations this season (i.e., ones that you have not previously visited)?

(Base: Wave 37 data. Respondents likely to take a ski trip in next 3 years, 210 completed surveys. Data collected November 20-22, 2020)

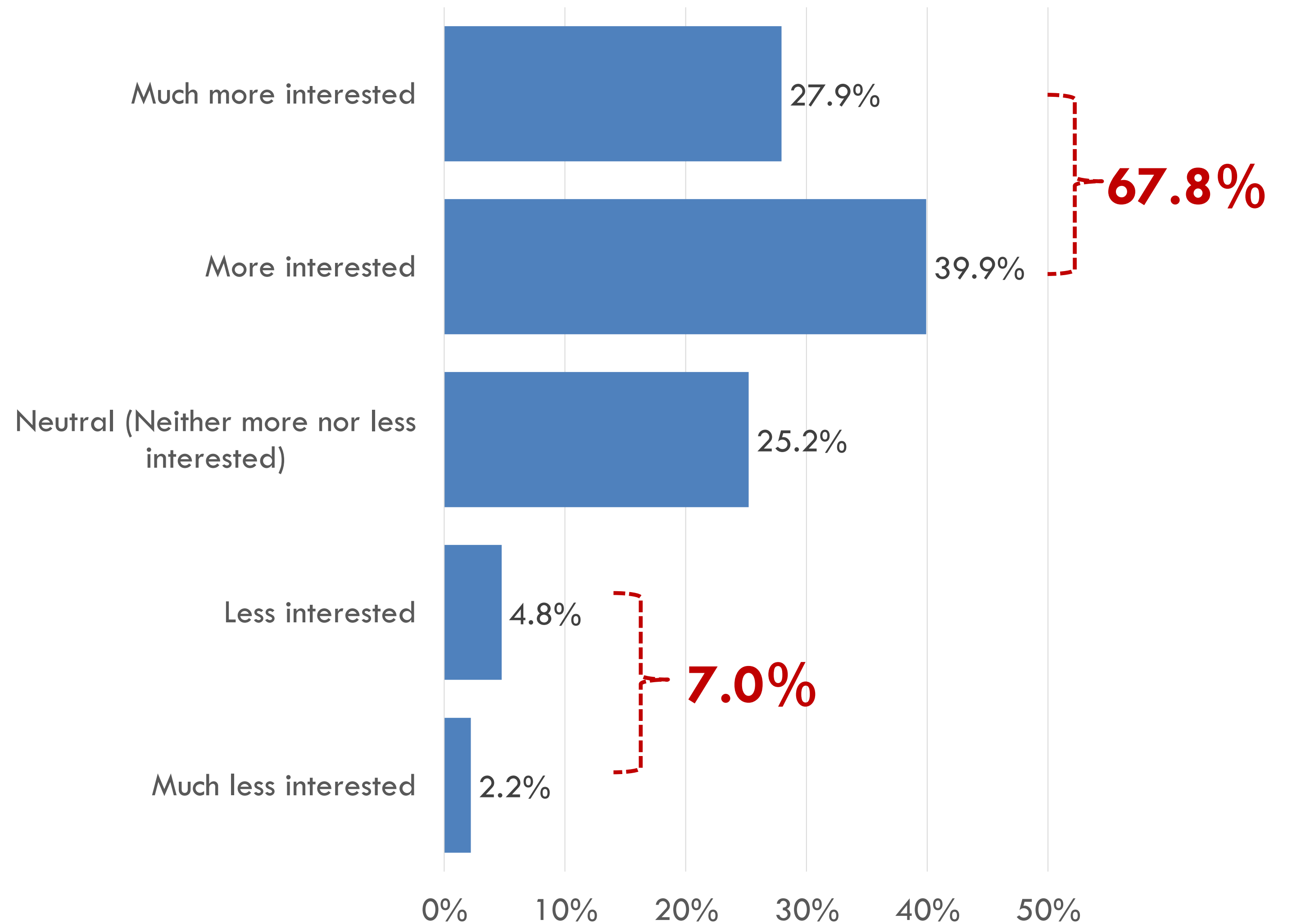


WILL SKI/SNOWBOARD RESORT PROTOCOLS EFFECT DESTINATION SELECTION?

Question: To allow for social distancing, many ski resorts are requiring guests to book their ski dates in advance and are limiting the number of people they let on the mountain.

How does this affect your interest in taking a ski/snowboarding trip this season?

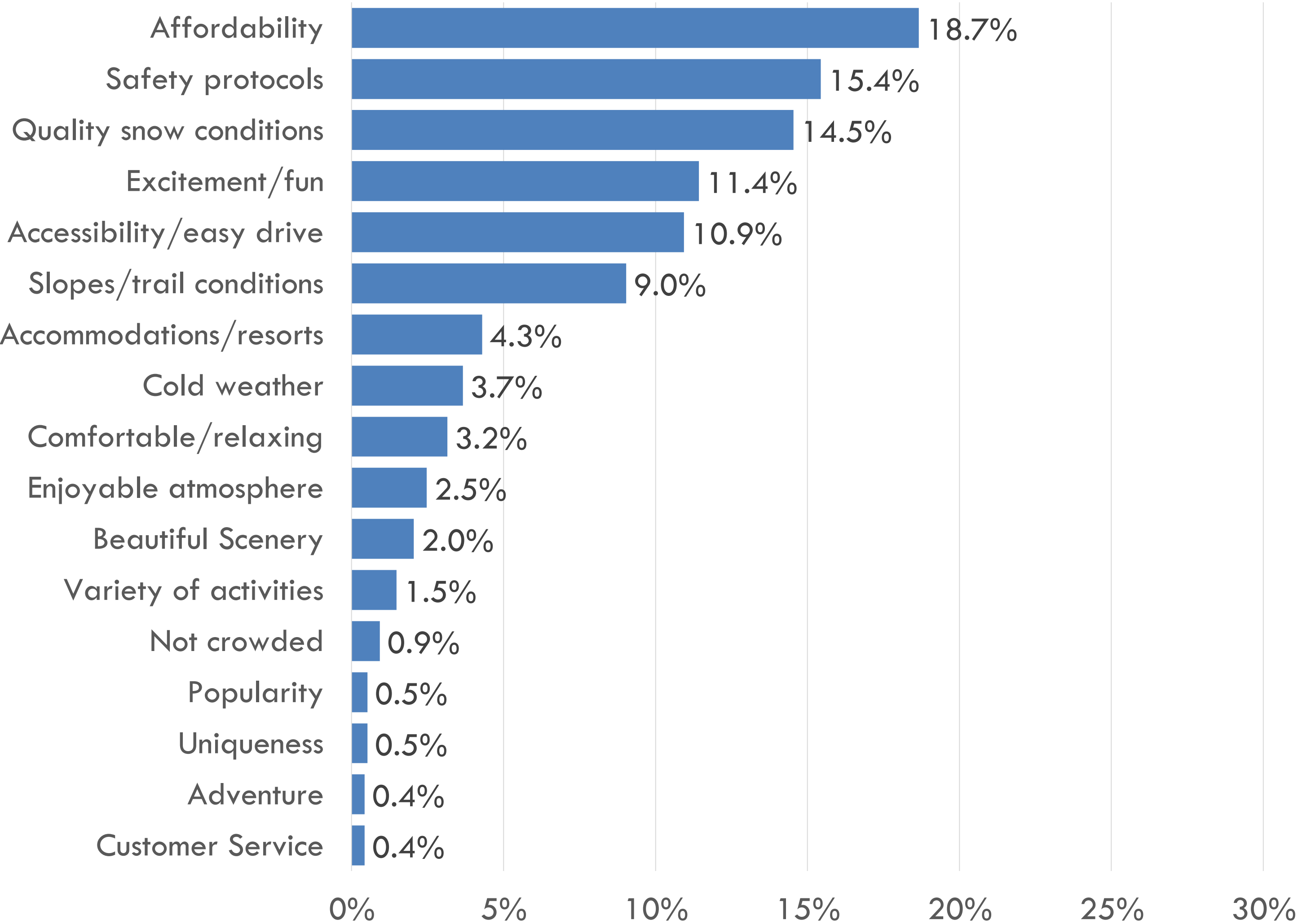
(Base: Wave 37 data. Respondents likely to take a ski trip in next 3 years, 210 completed surveys. Data collected November 20-22, 2020)



MOST IMPORTANT FACTOR IN SKI/SNOWBOARD DESTINATION SELECTION

Question: What is the #1 factor you consider in choosing ski destinations?

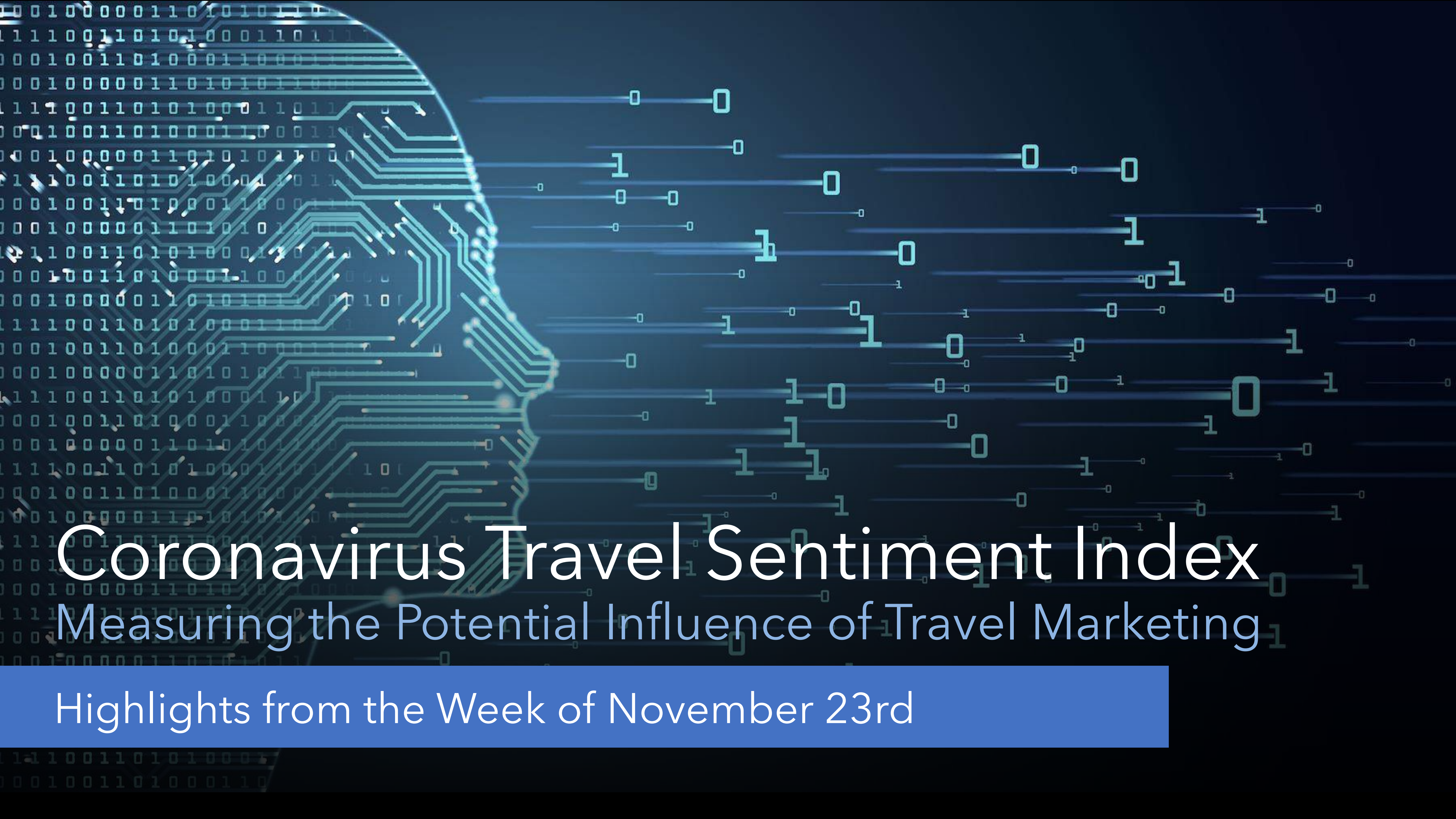
(Base: Wave 37 data. Respondents likely to take a ski trip in next 3 years, 156 completed surveys. Data collected November 20-22, 2020)



Key Takeaways

1. The perceived safety of ski/snowboard trips this season has dipped.
2. While about half of ski/snowboarders have a go-to destination, interest in new places is high
3. The safety protocols at resorts are likely to impact many destination decisions
4. Affordability, safety protocols and snow quality are top factors in picking a destination





Coronavirus Travel Sentiment Index

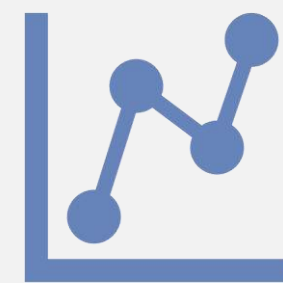
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 23rd

What is a Predictive Index?



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



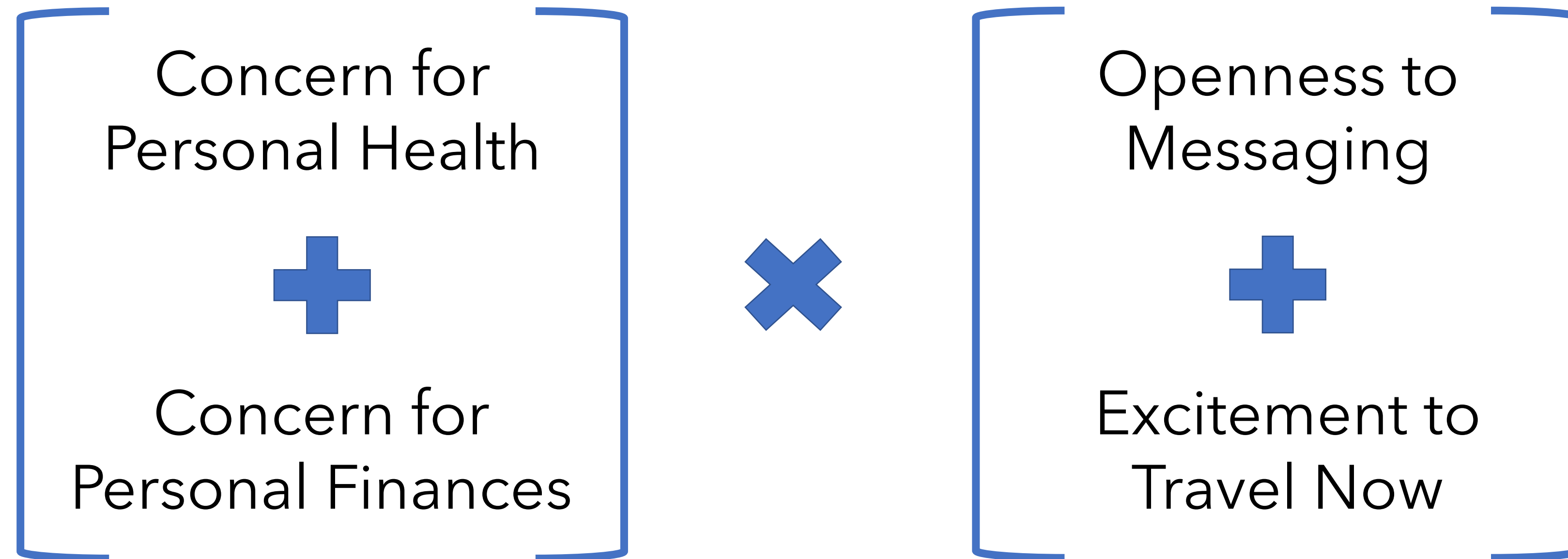
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

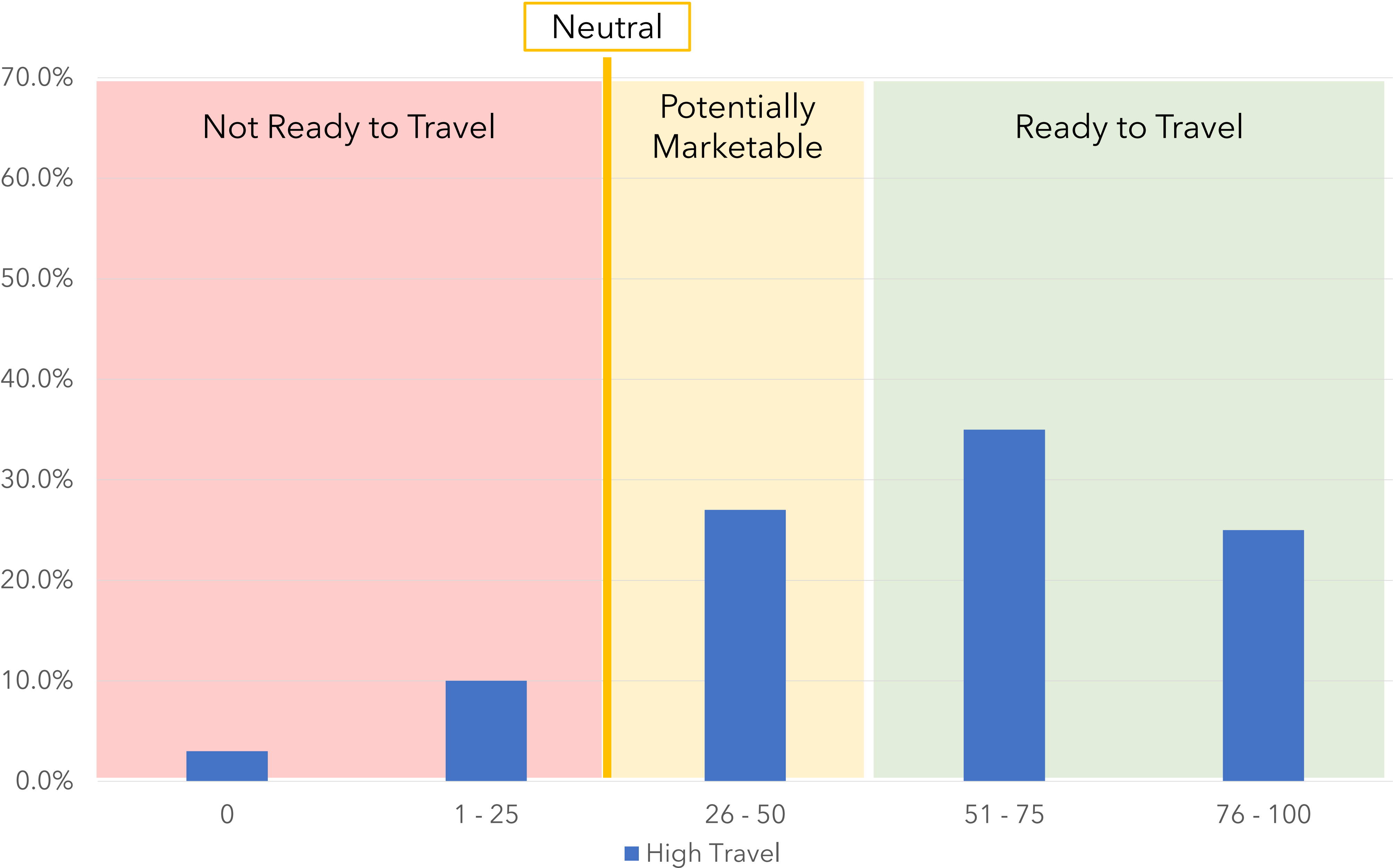
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



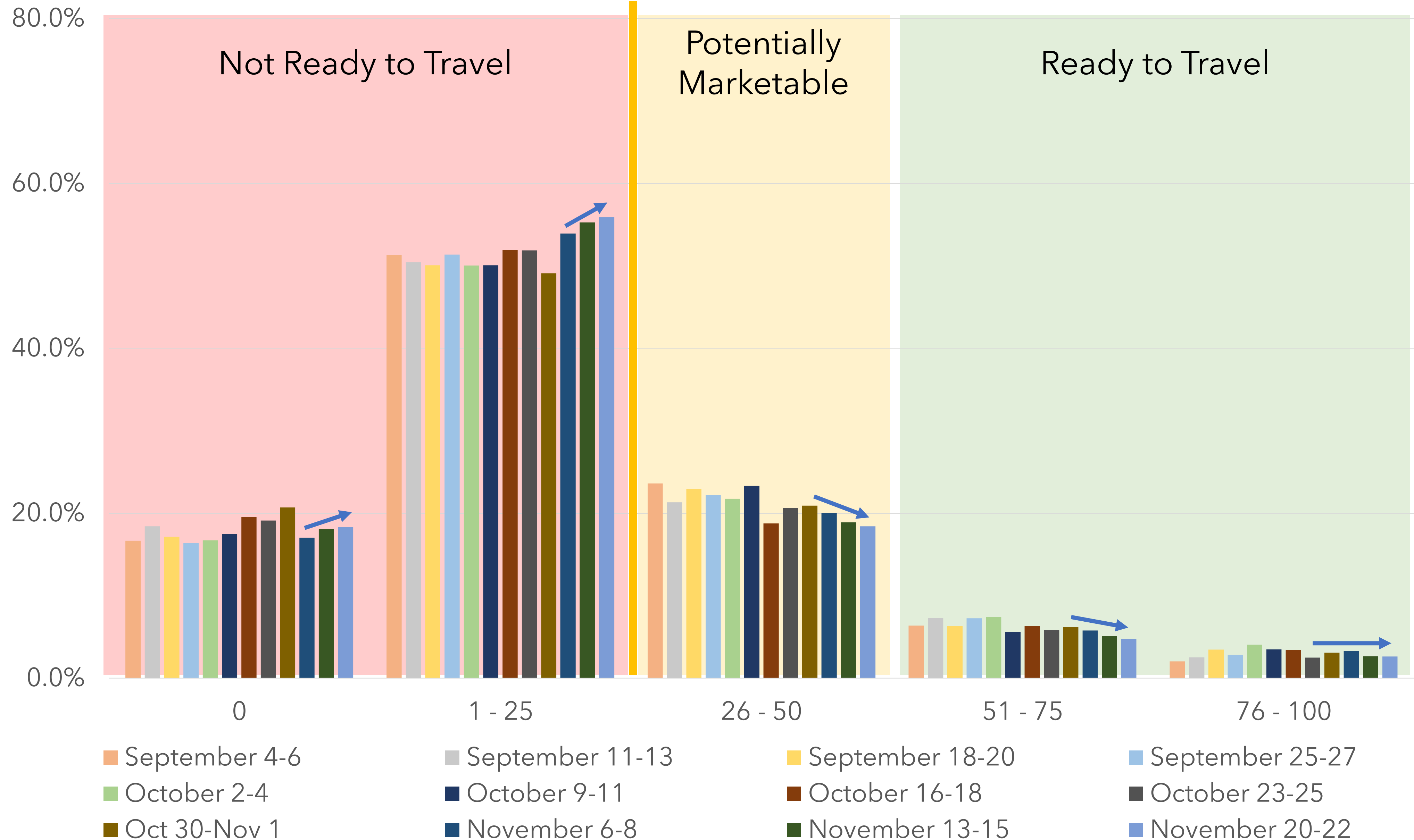
*Normalized to a 100pt scale

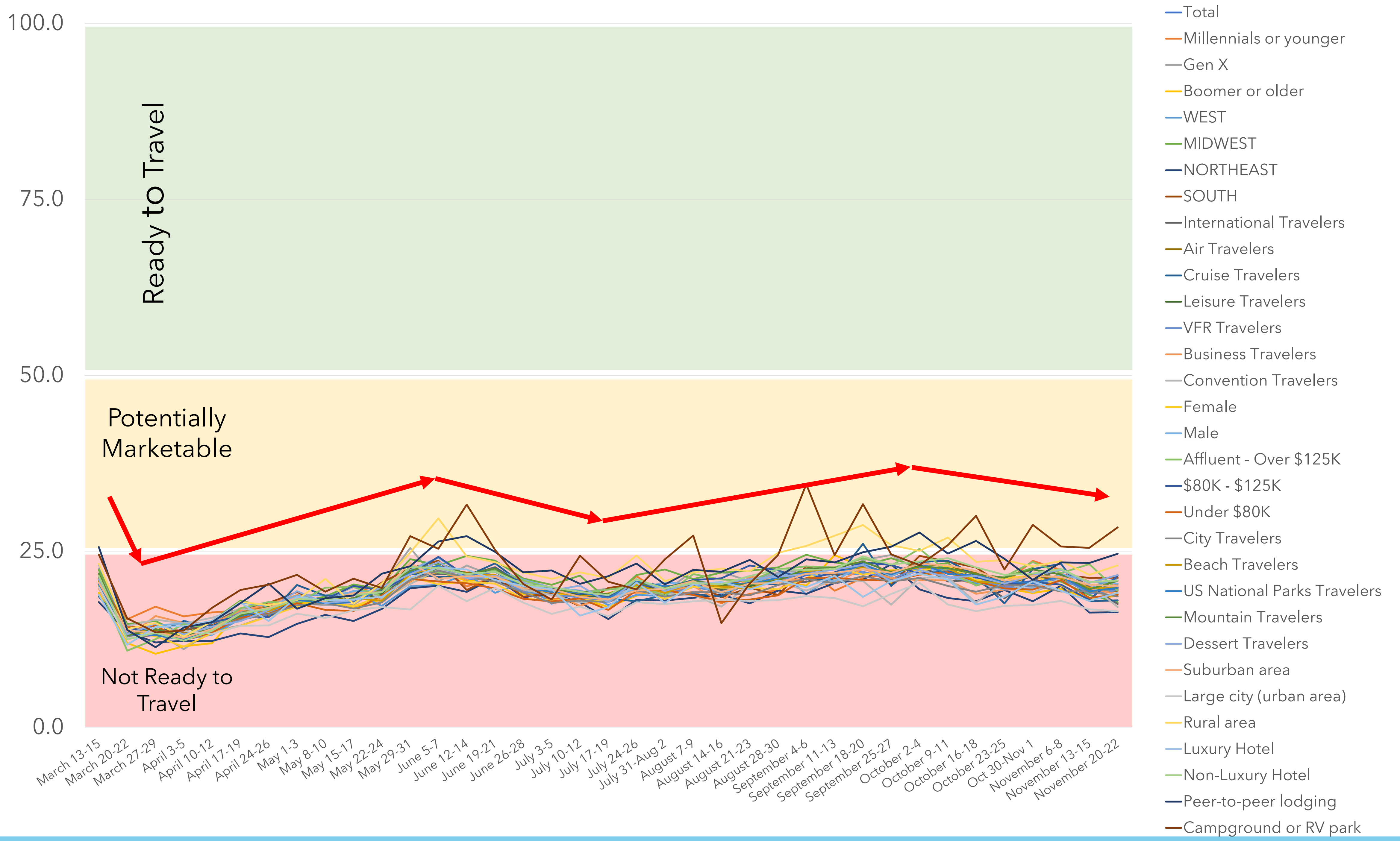
Healthy Travel Outlook

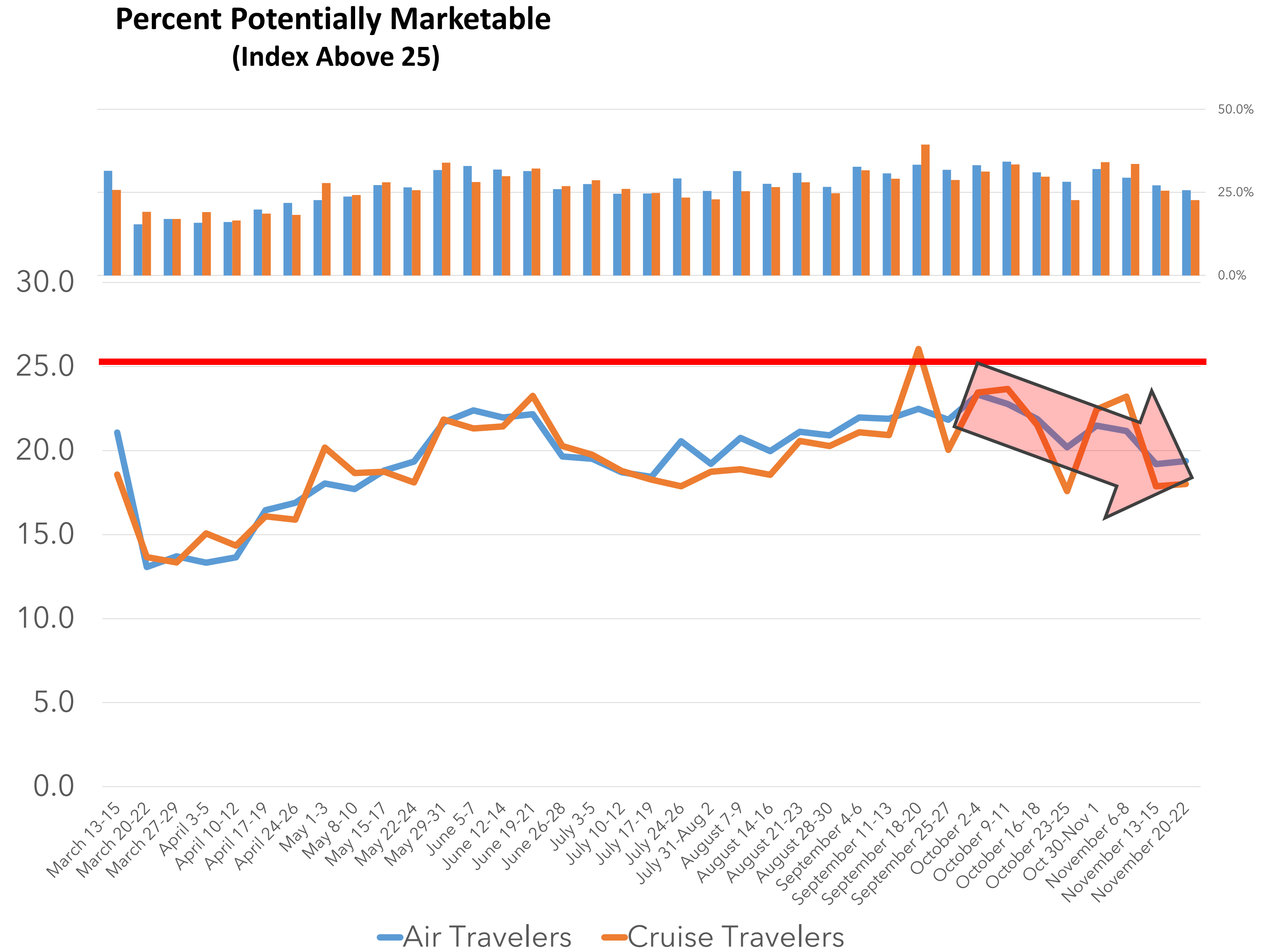
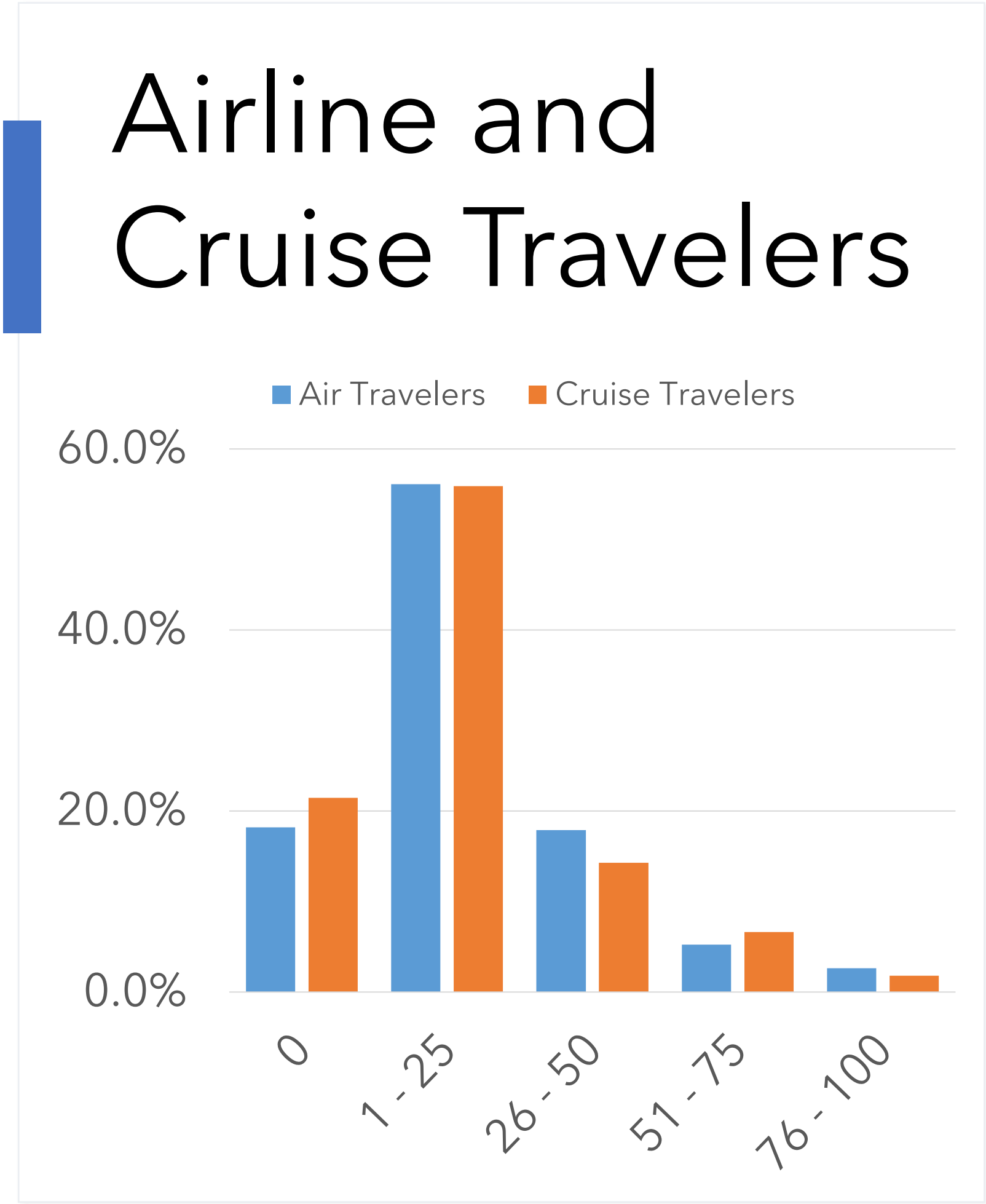


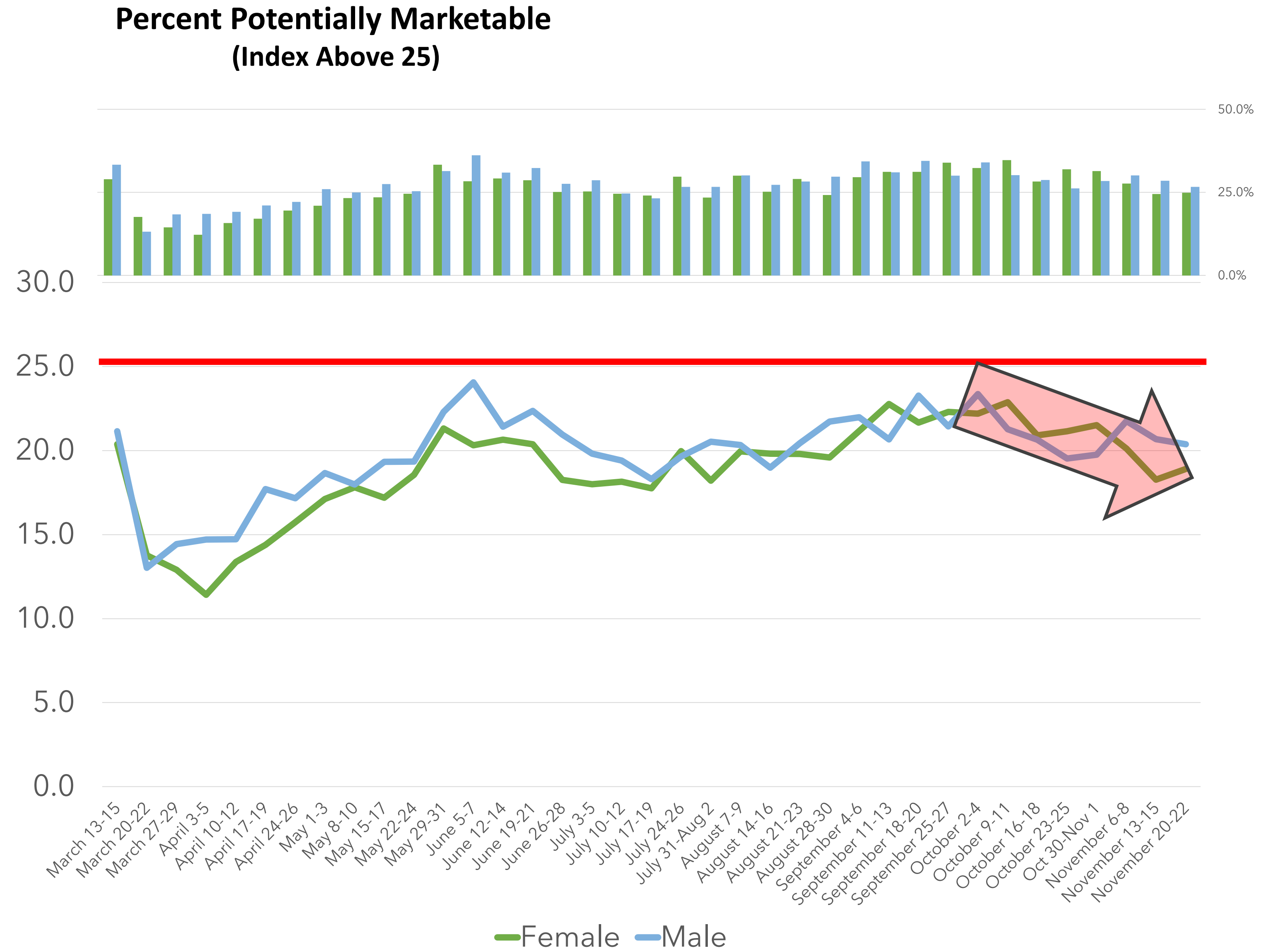
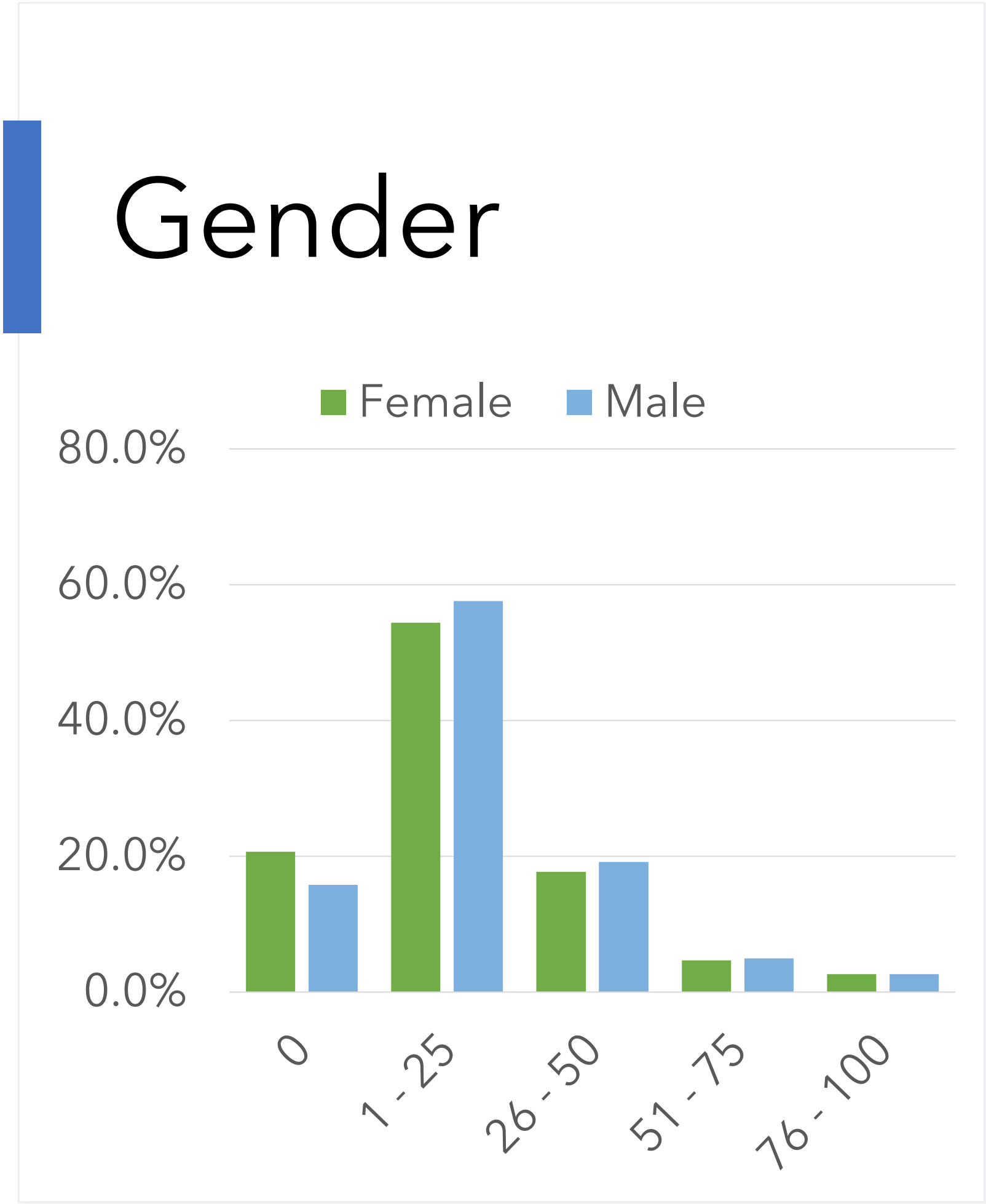
Travel Outlook

Neutral



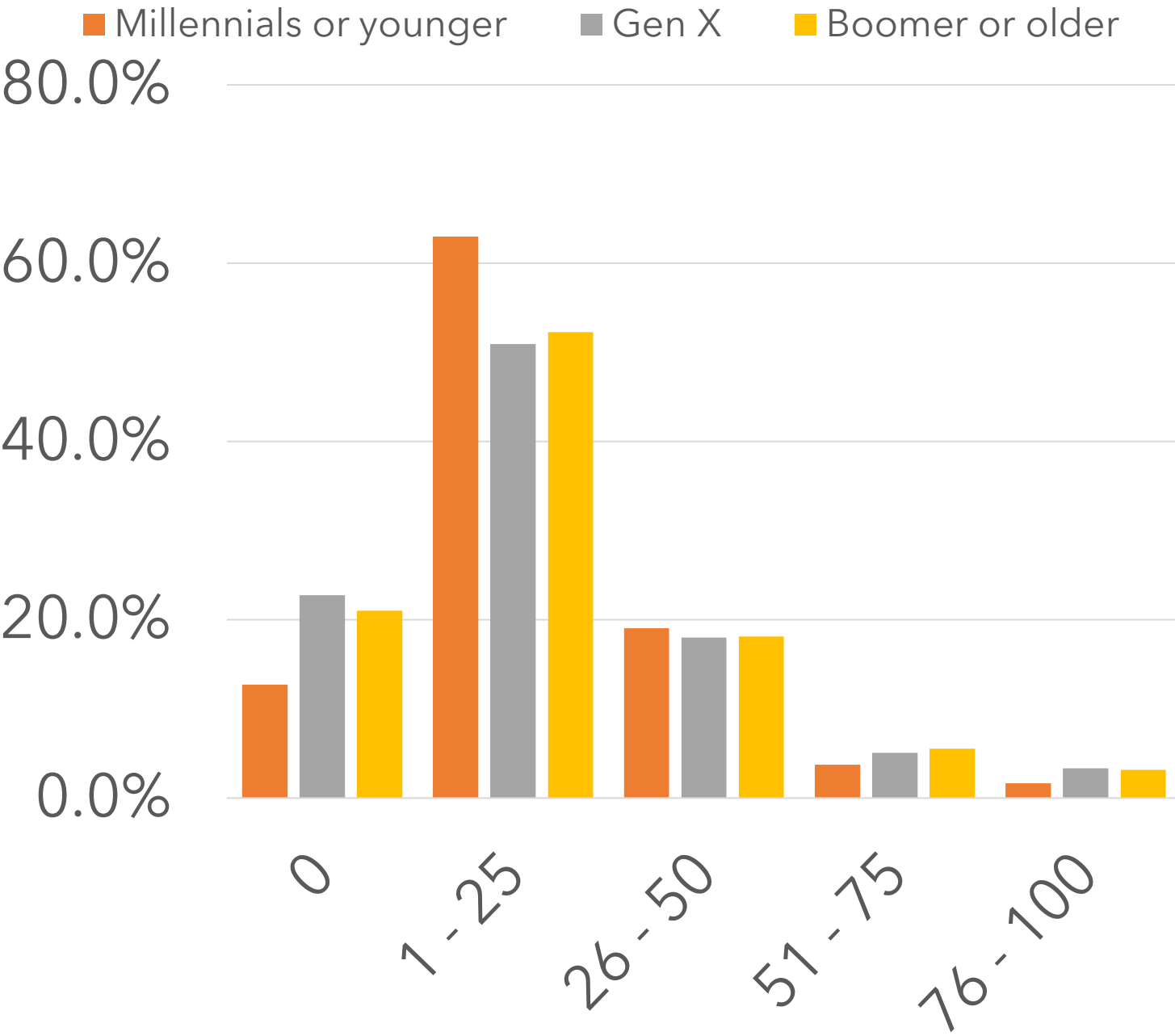




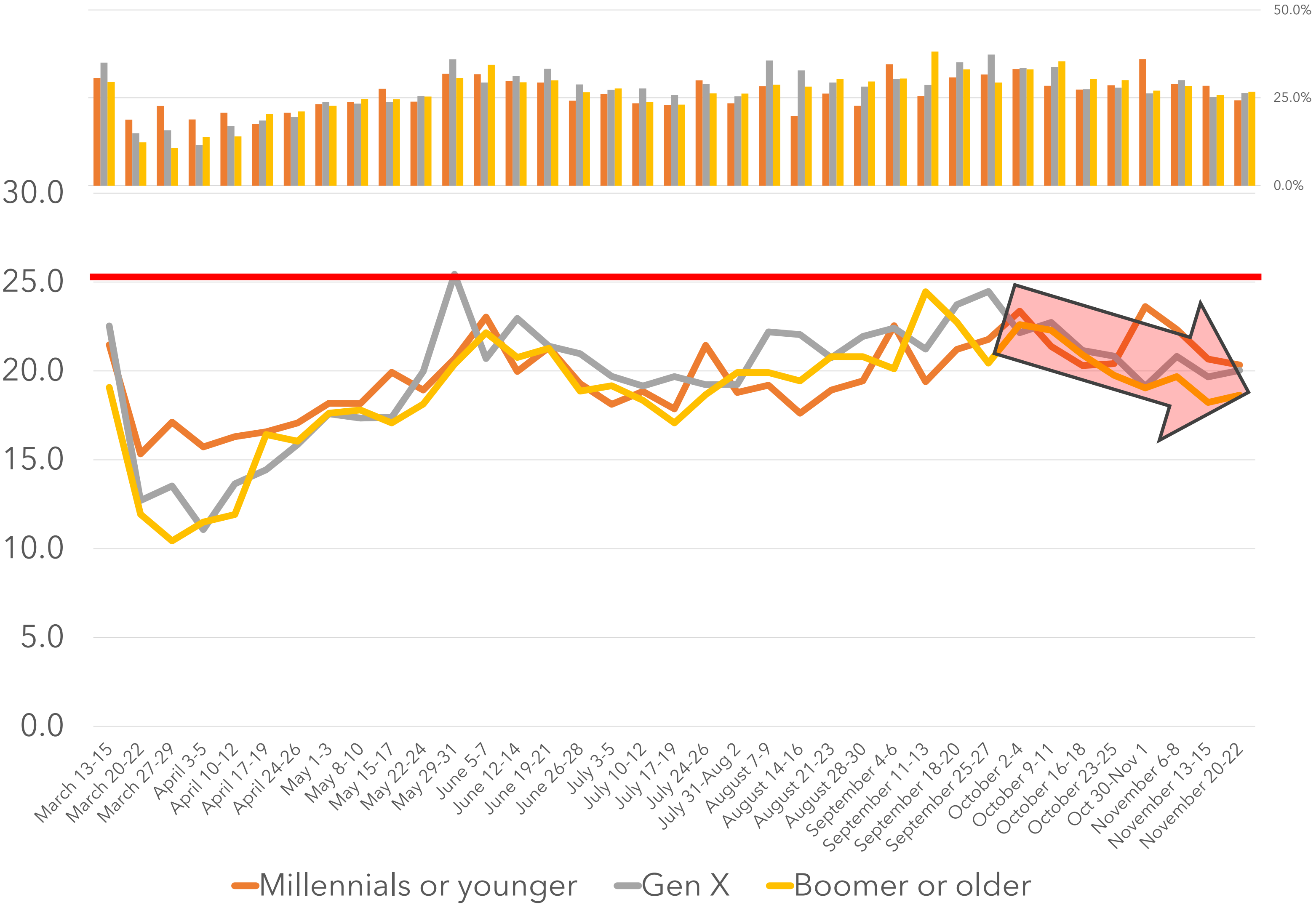


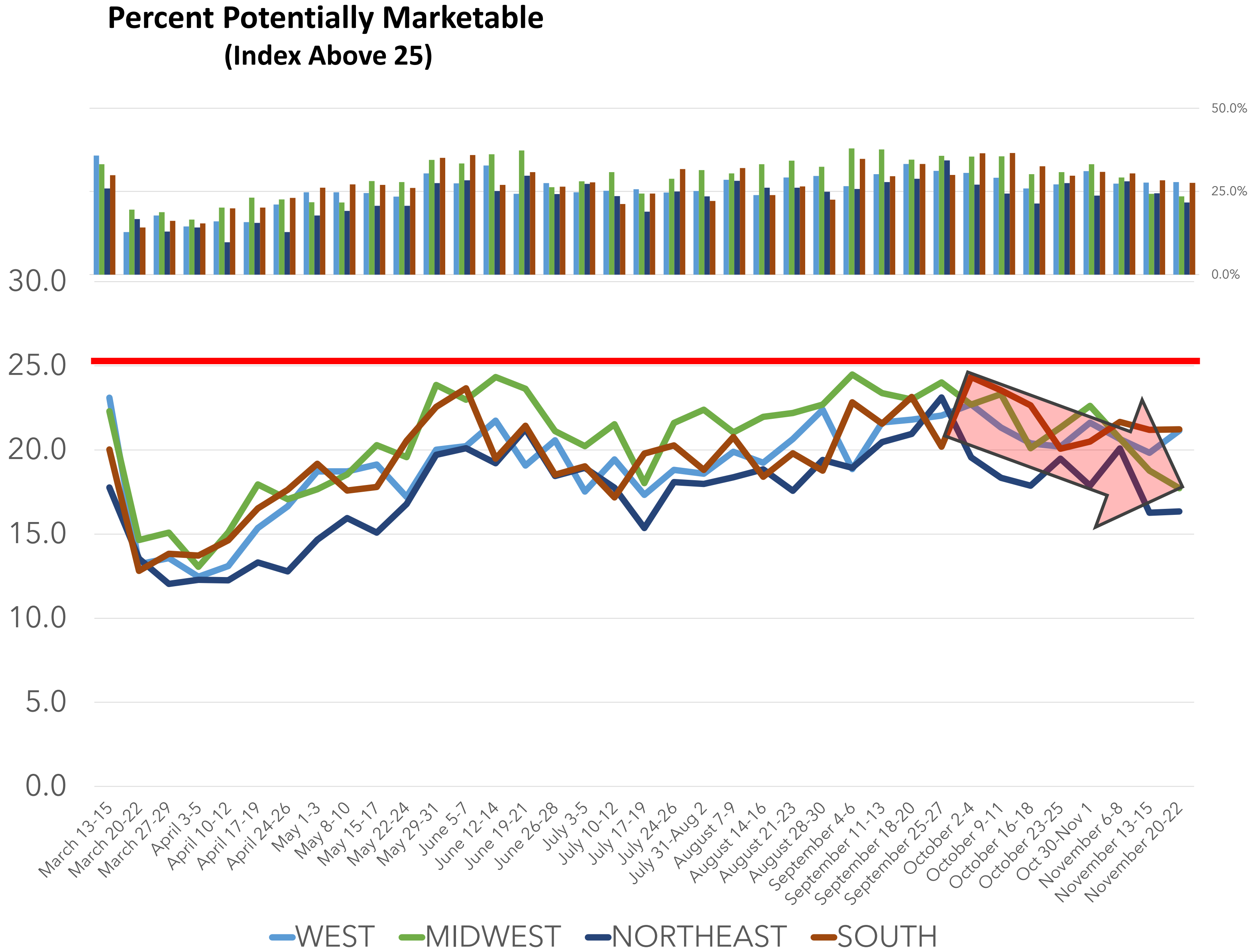
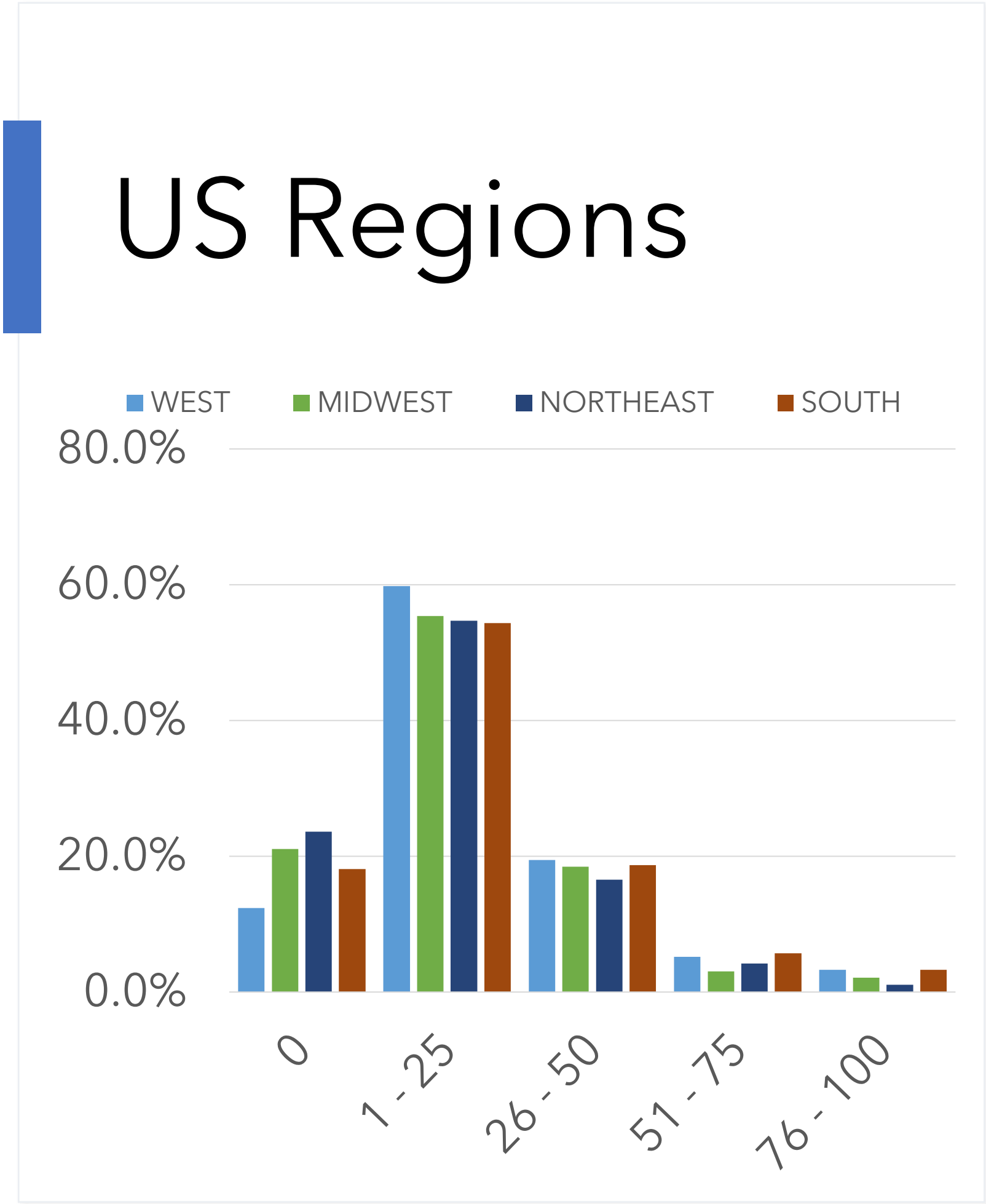


Generation



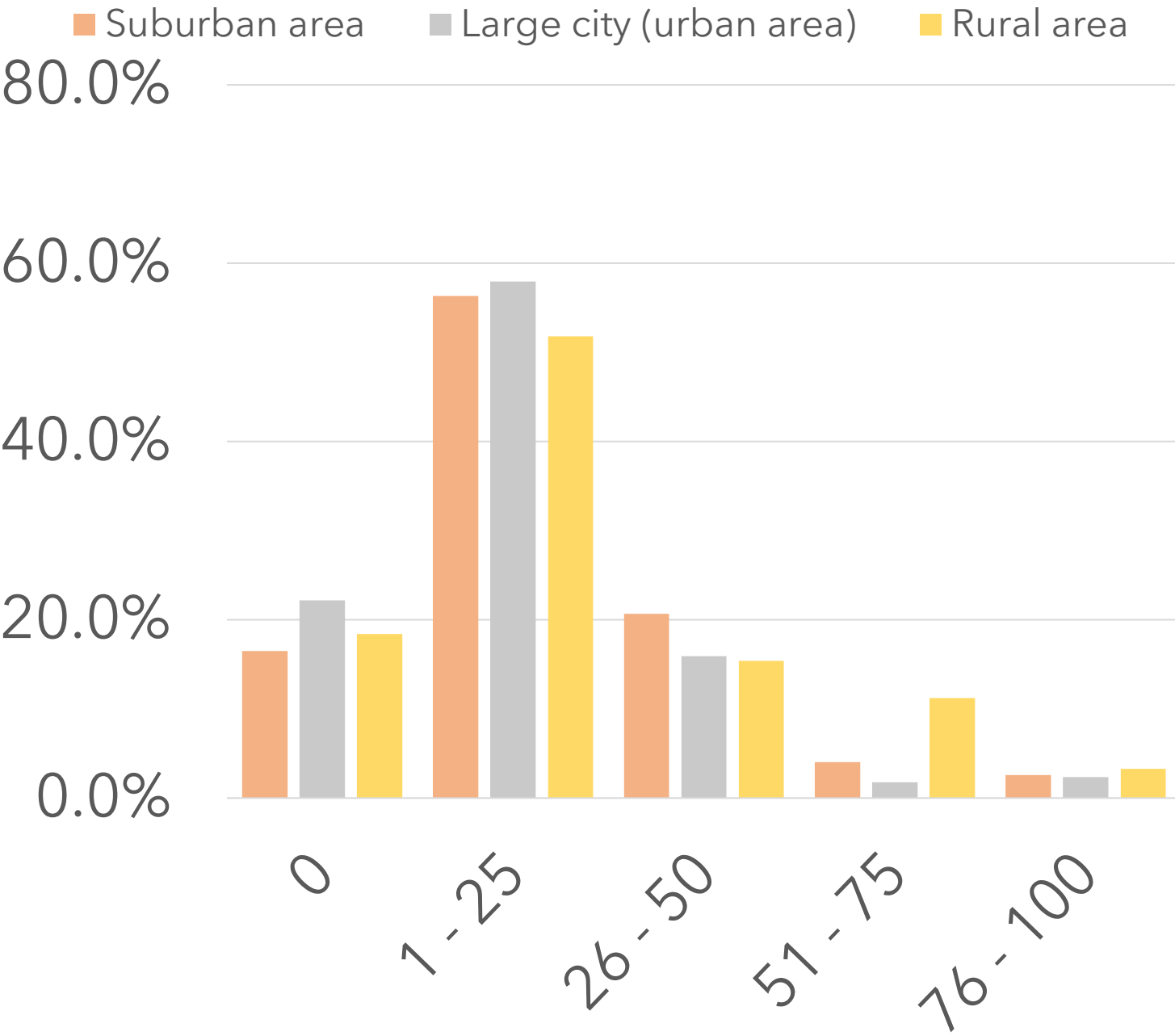
Percent Potentially Marketable (Index Above 25)



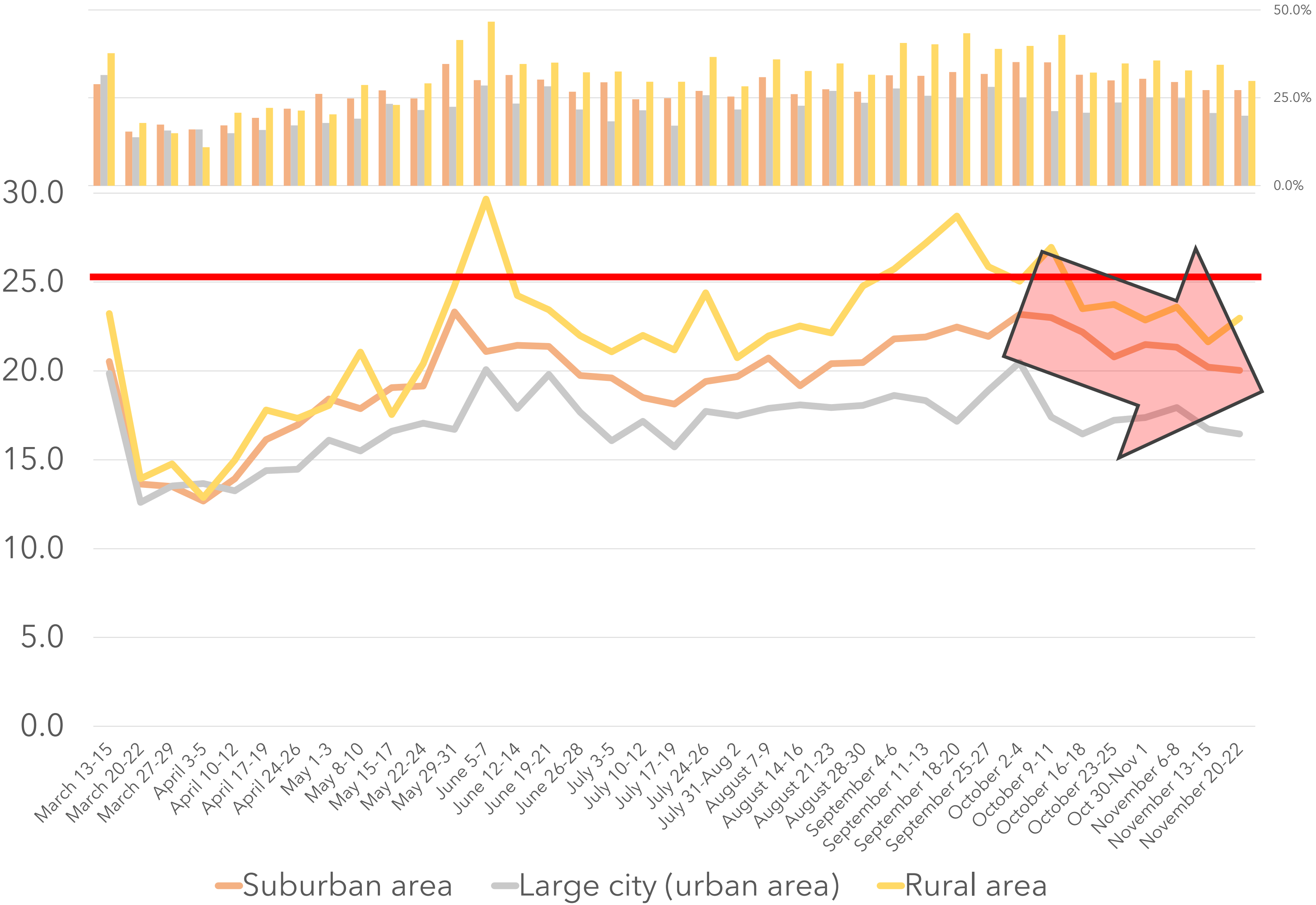




Residence Type



Percent Potentially Marketable (Index Above 25)



Key Takeaway


1. Across segments, marketability has been slipping in the past month.



Ben Rosen
@ben_rosen



zoom needs a button that plays wrap
it up music like at the oscars



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The State of the International Traveler

Coming soon!



The show airs Sunday at 11:00 AM EST, and you can catch it either with Live Streaming on wchv.com or download the WCHV APP on either iTunes or Google Play.

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want us to explore?**

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