

# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

PRESENTATION OF FINDINGS

WAVE 43

January 5, 2021

Destination  Analysts







# 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 43 data (fielded January 1<sup>st</sup>-3<sup>rd</sup>) 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**

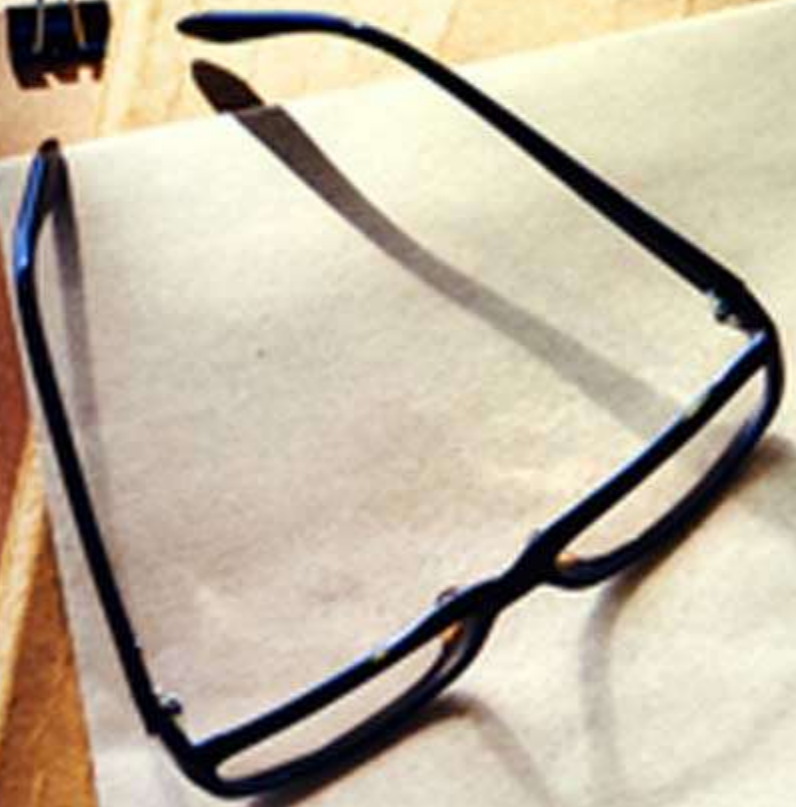




**Presentation deck and webinar  
recording available on our website:**

[DestinationAnalysts.com/covid-webinars](https://DestinationAnalysts.com/covid-webinars)







YEAR IN REVIEW

# Goodbye, 2020



## QUARANTINE HAS LEFT US CRAVING ADVENTURE. HERE'S WHAT 2021 HAS IN STORE.

25 under-the-radar dream destinations, how to rewrite your adventure-travel bucket list, a dreamy trip to Finland's far north, and luxe socially distanced lodging.



# US coronavirus death toll surpasses 350,000 as experts anticipate post-holiday surge

More than 20 million people in the country have been infected



By Danielle Wallace | Fox News



## Dr. Siegel on coronavirus vaccine rollout across the country

Fox News medical contributor Dr. Marc Siegel weighs in on COVID vaccine distribution

The [coronavirus](#) death toll in the United States surpassed 350,000 early Sunday, as experts anticipate another surge in [cases](#) and fatalities stemming from [Christmas](#) and [New Year's](#) holiday gatherings.

Data compiled by Johns Hopkins University showed the U.S. passed the threshold early Sunday morning. More than 20 million people in the country have been infected.



# COVID-19 Cases Surge In U.S. As Vaccinations Fall Below Government Predictions

January 3, 2021 · 4:58 PM ET

WYNNE DAVIS



Norman Einspruch, 88, a cardiology patient at Jackson Memorial Hospital in Miami, Fla., receives his first dose of the Pfizer-BioNtech COVID-19 vaccine Dec. 30.

*Eva Marie Uzategui/AFP via Getty Images*



## A new COVID-19 strain is spreading

At least three states — California, Colorado and Florida — and 33 countries have identified a more contagious coronavirus variant, known as B.1.1.7. The strain was first spotted in September in southeastern England and accounted for a quarter of cases in London by November. By the week of Dec. 9, it was responsible for 60% of cases in the city. There is no evidence that B.1.1.7 causes more severe illness or increased risk of death, according to the Centers for Disease Control and Prevention.

**On the vaccine front:** the United States fell far short of its goal to inoculate 20 million front-line workers and the elderly in December, according to CDC data. More than 4.2 million people received the first of two required doses as of Jan. 3. More than 13 million doses were distributed across the nation.



Nurse Debbie Mahoney administers a COVID-19 vaccine to nurse Alexa Zarlengo at Ascension Saint Thomas Hospital West in Nashville, Tenn., on Dec. 17. *Andrew Nelles, The Tennessean*



# When will you get your stimulus payment, and how?



By [Katie Lobosco](#), CNN

Updated 5:06 PM ET, Mon January 4, 2021



## MORE FROM



Don  
supp



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well



A woman with long brown hair, wearing glasses, a blue surgical face mask, a white turtleneck, a light-colored button-down shirt, and a long brown coat, stands in an airport. She is holding a bright yellow rolling suitcase with her right hand. She is looking upwards and to the right. The background is a blurred airport terminal with white structural elements and a red retractable belt stanchion. The text "CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL" is overlaid in the center in a bold, white, sans-serif font, with the ampersand in blue.

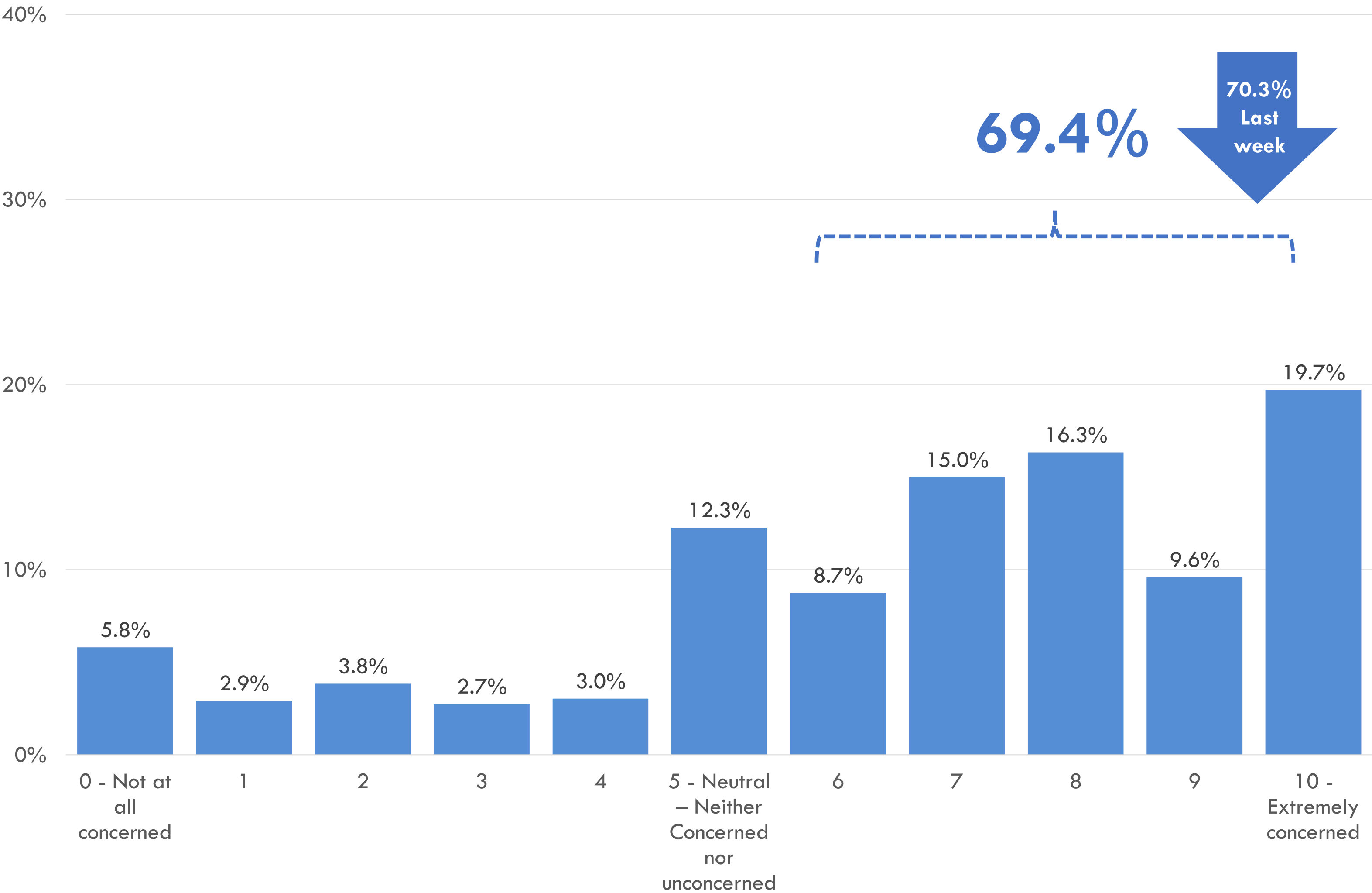
# CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL



# 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 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



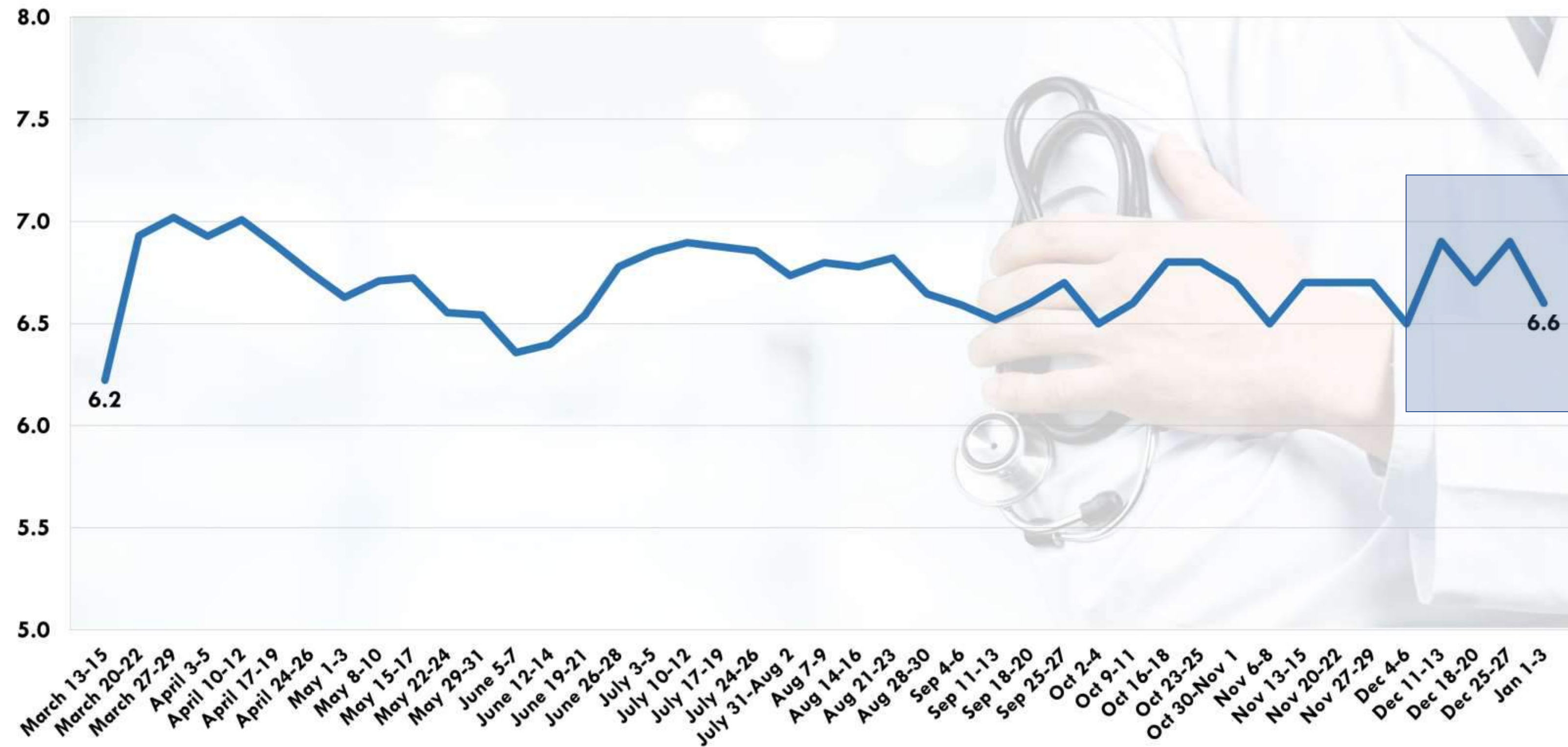


# PERSONAL HEALTH CONCERNS

## MARCH 13, 2020 – JANUARY 3, 2021



**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?**

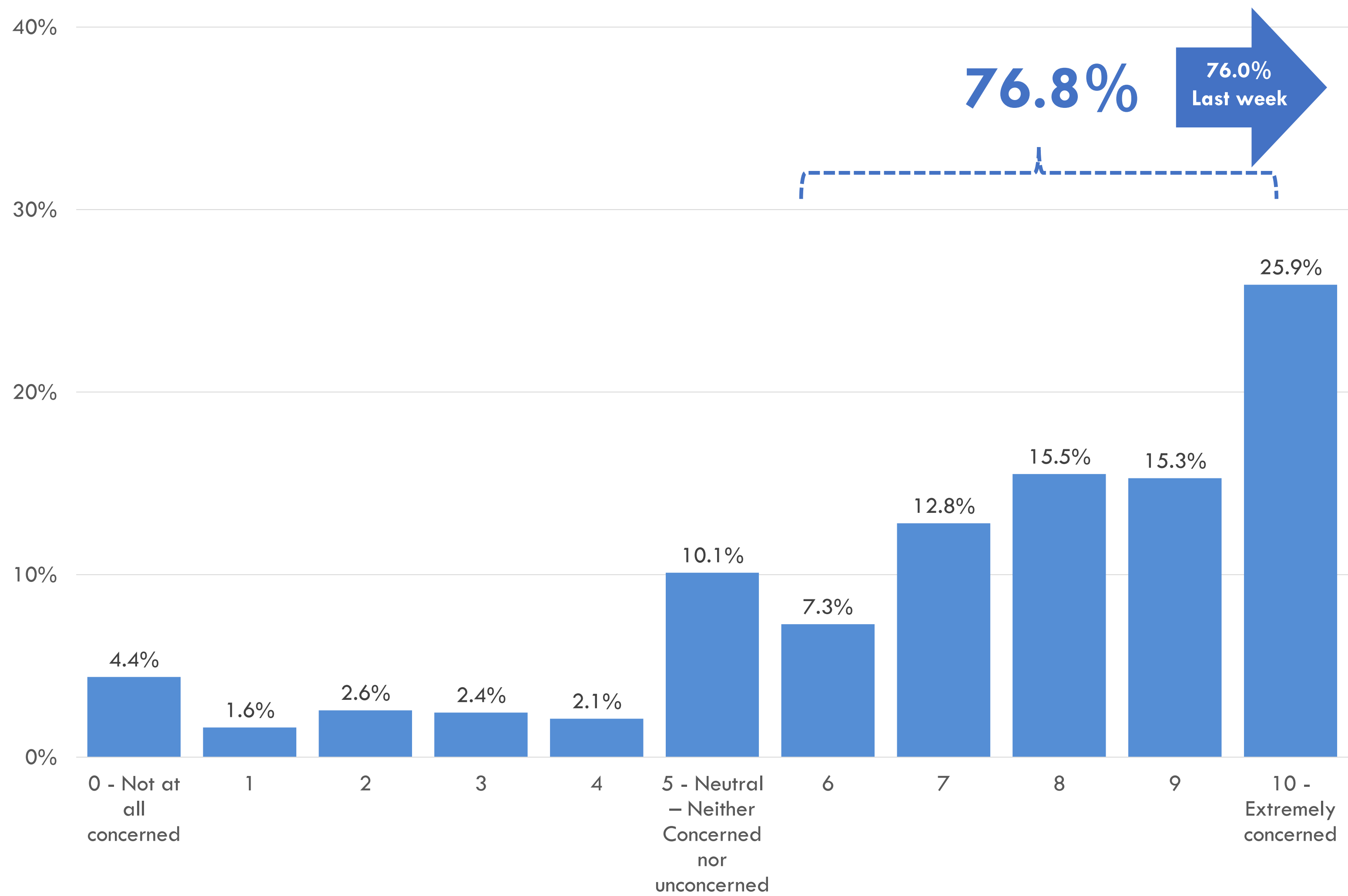
(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 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 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



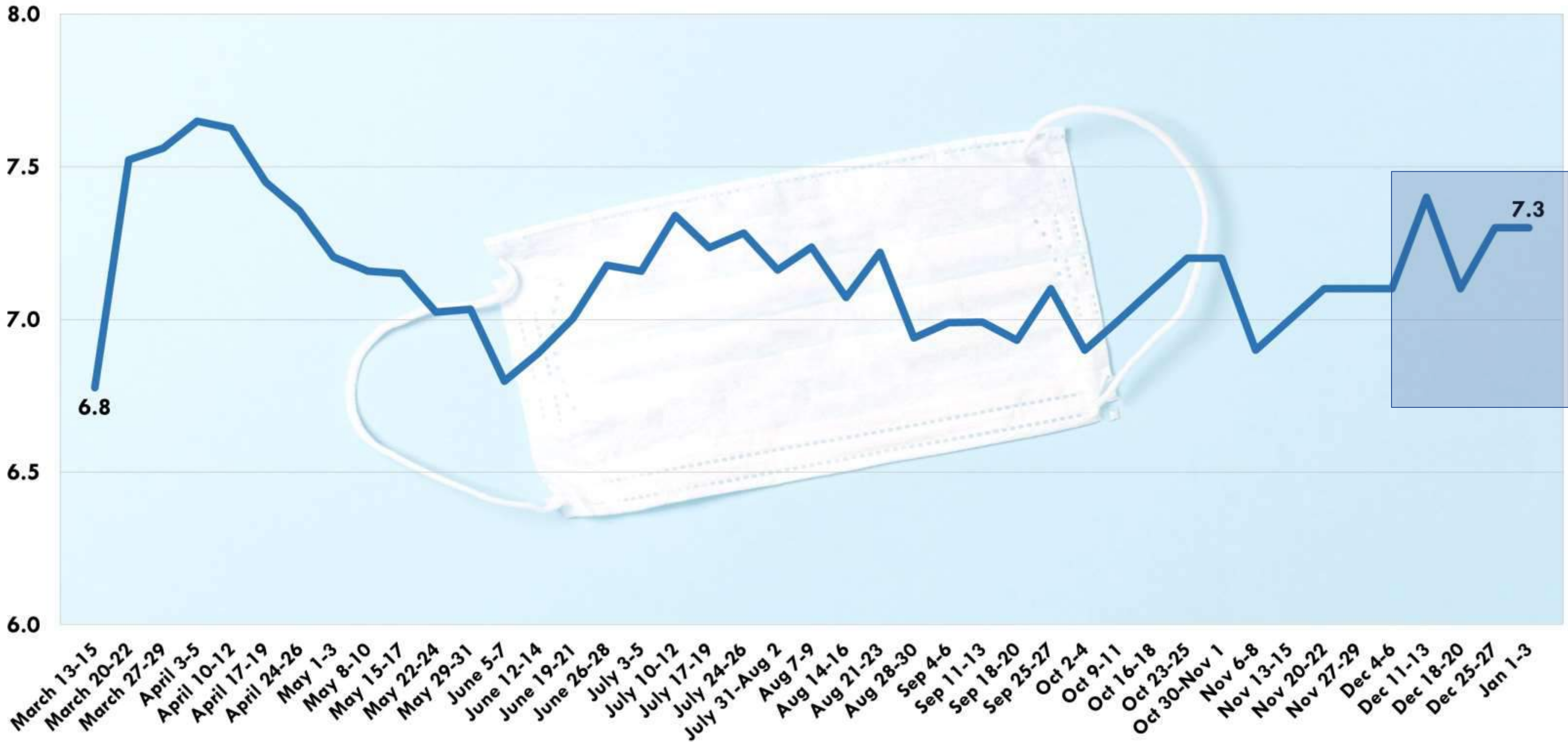


# HEALTH CONCERNS (FAMILY & FRIENDS)

MARCH 13, 2020 – JANUARY 3, 2021



**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?**

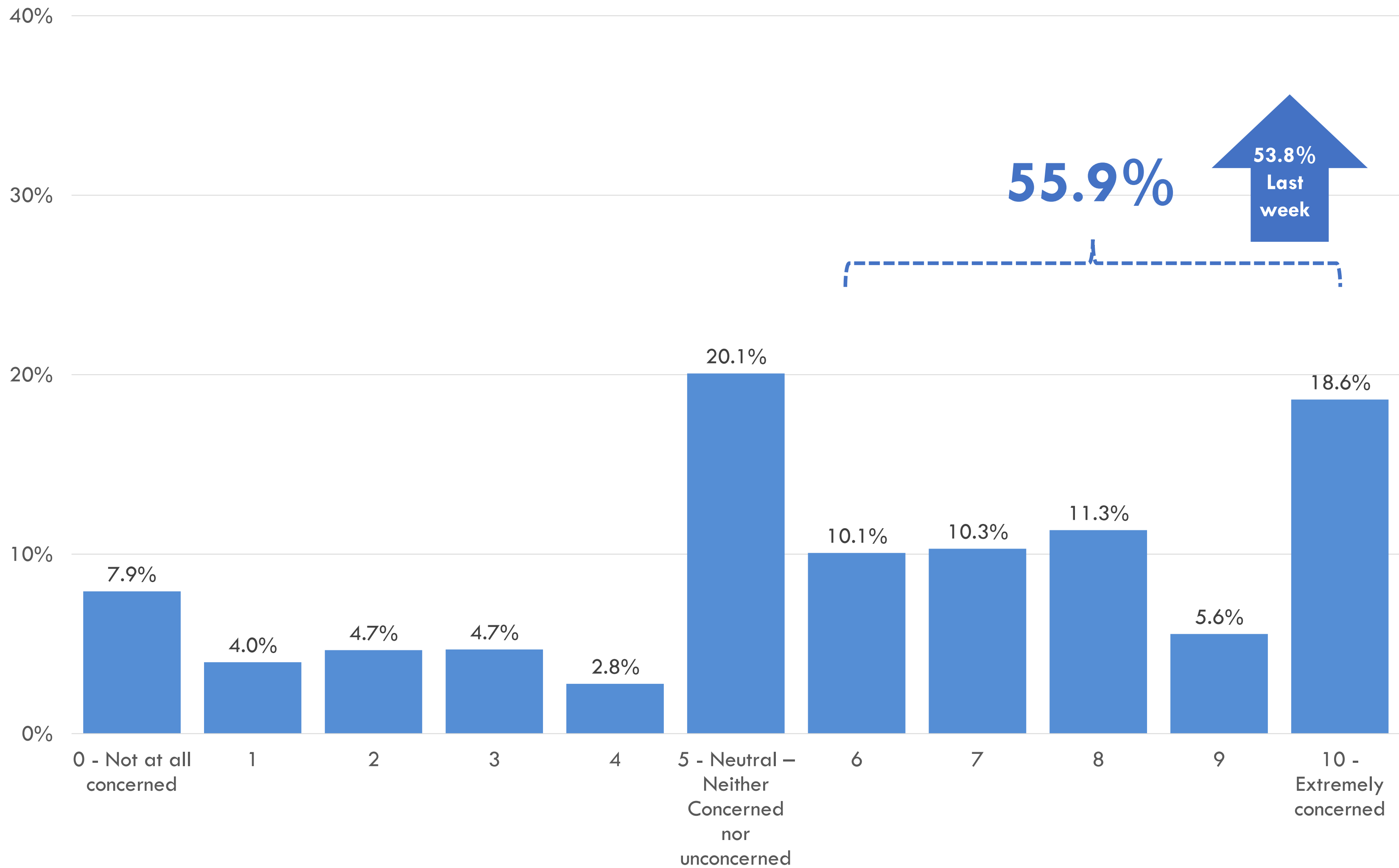
(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 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 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



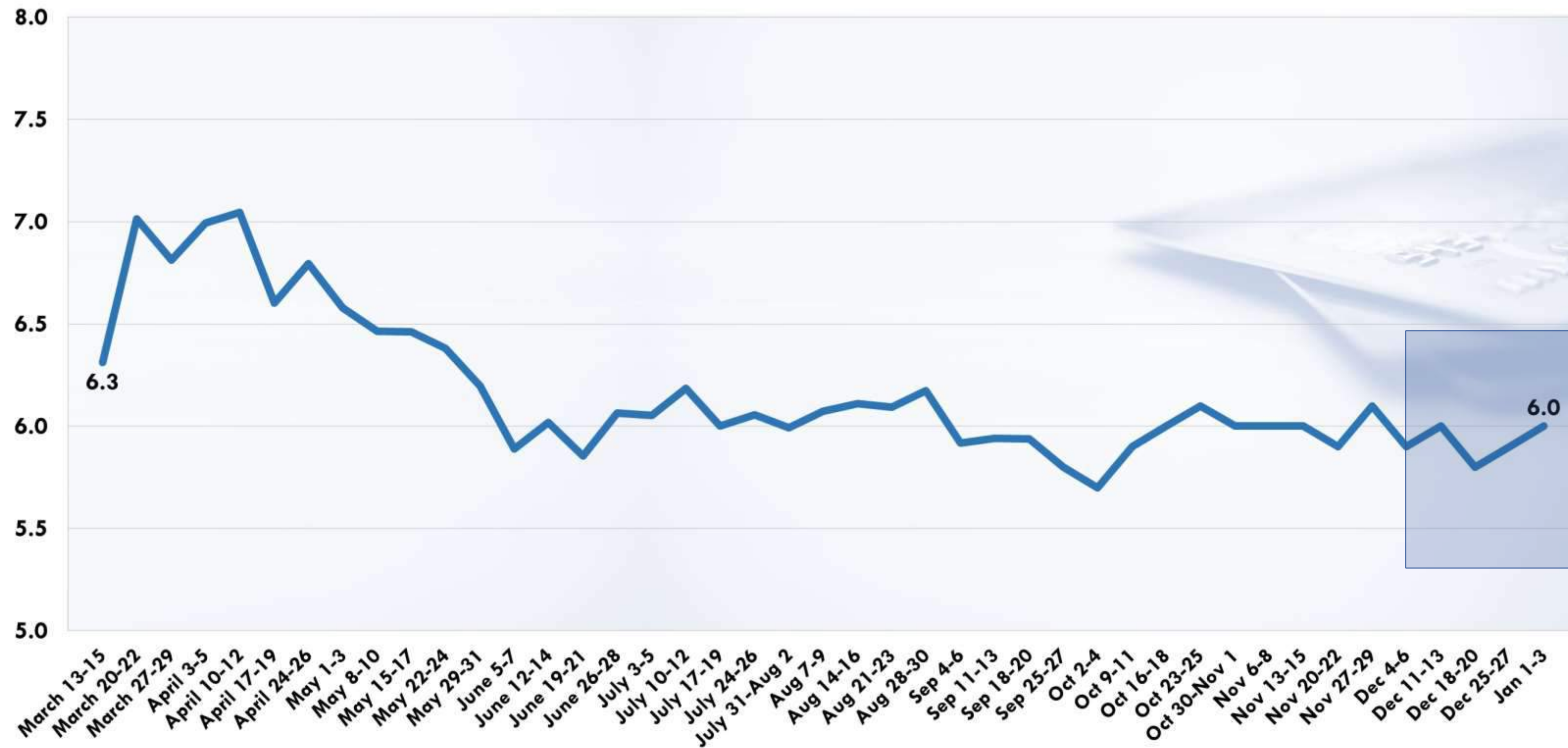


# CONCERNS ABOUT PERSONAL FINANCES

MARCH 13, 2020 – JANUARY 3, 2021



**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?**

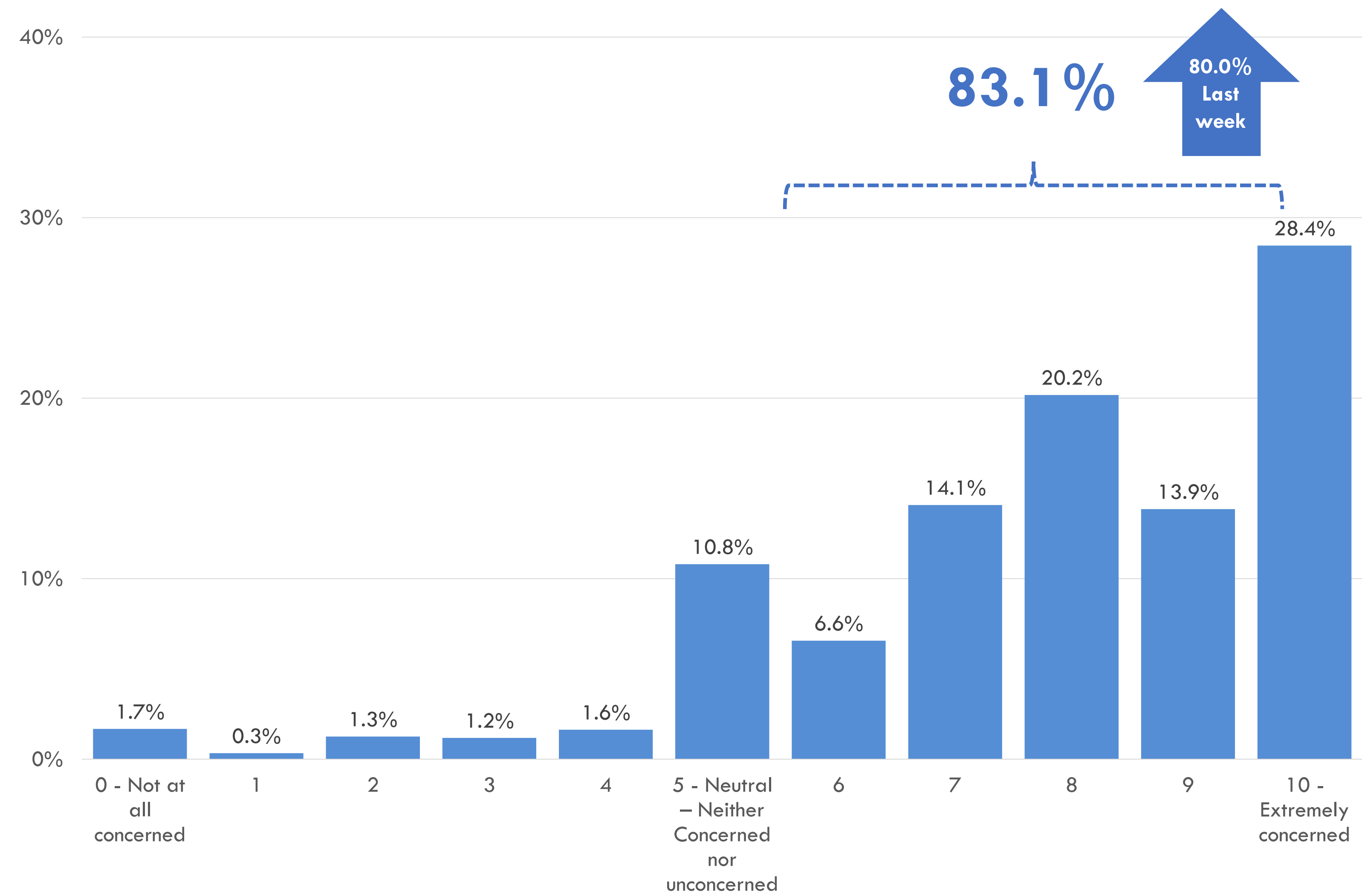
(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)



# 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 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



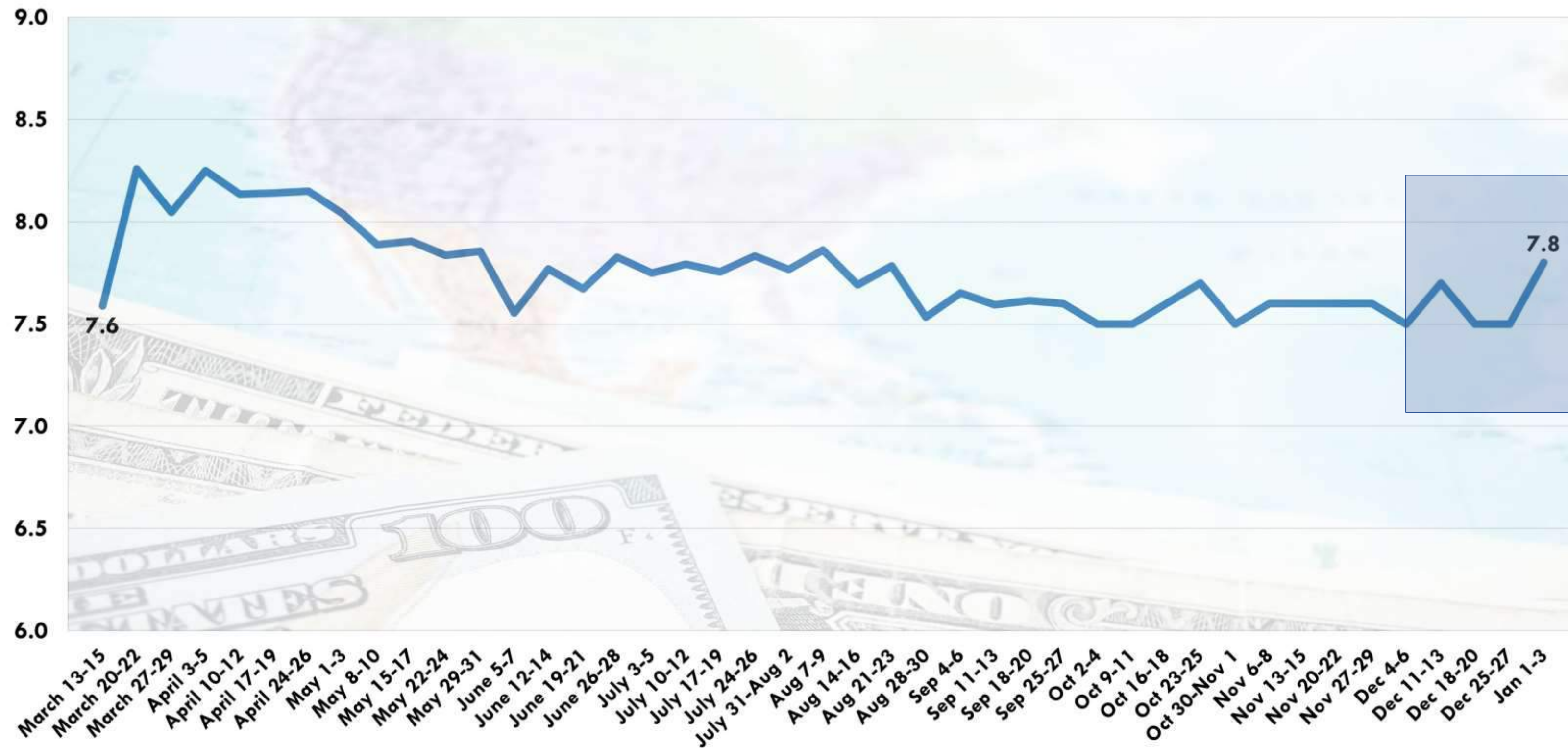


# CONCERNS ABOUT NATIONAL ECONOMY

MARCH 13, 2020 – JANUARY 3, 2021



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?**

(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

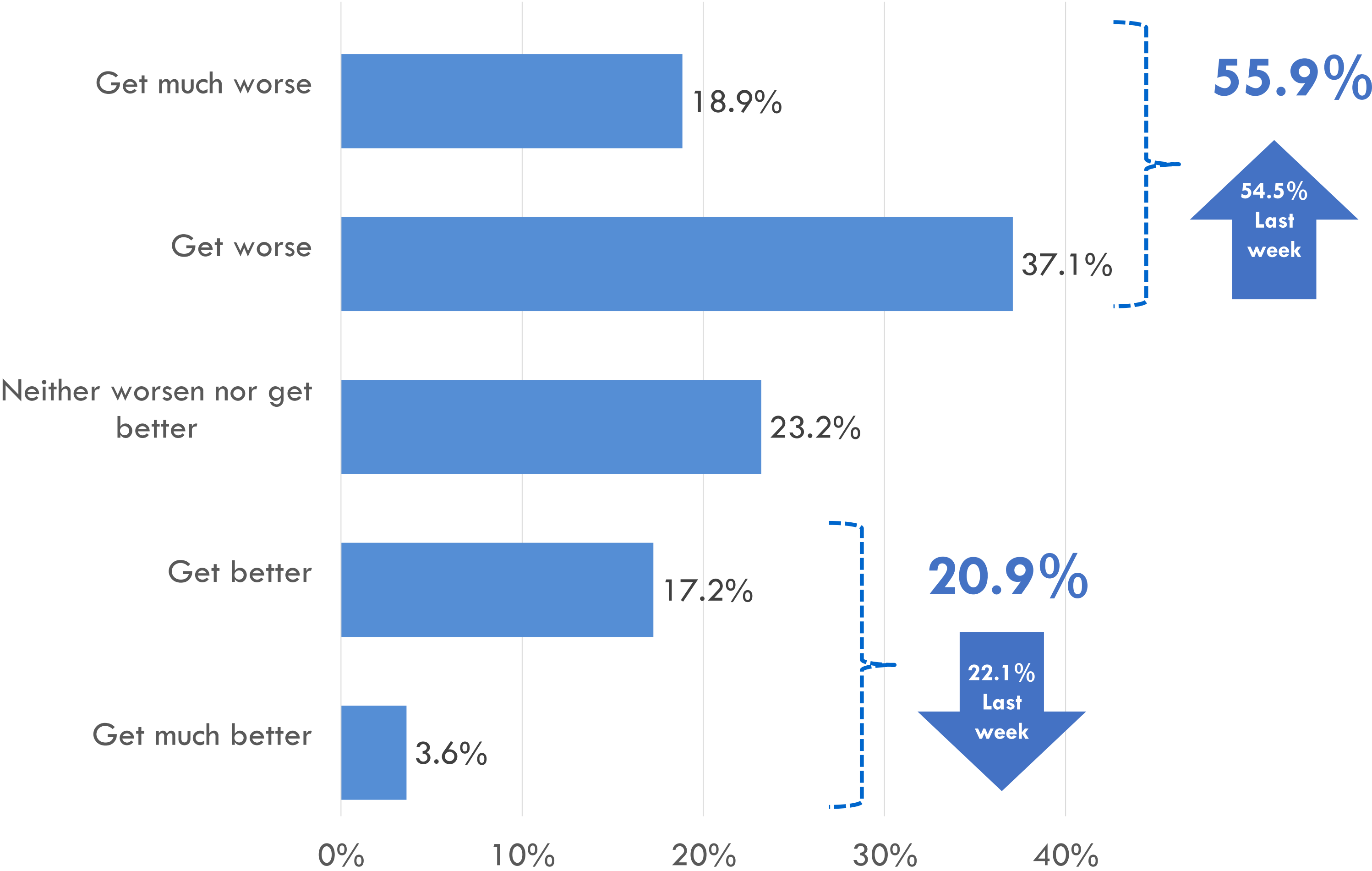


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

**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 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



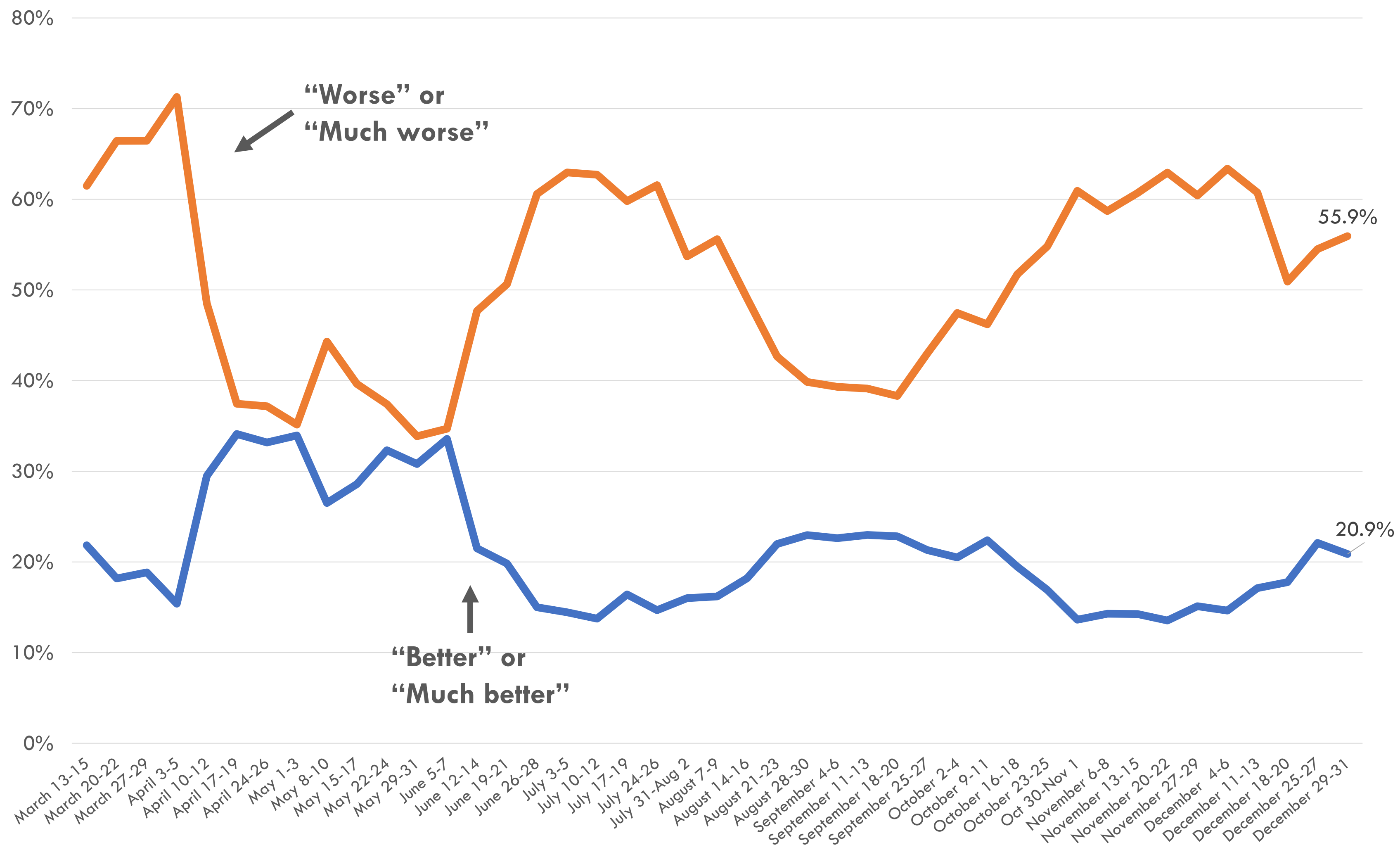


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-43)

**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 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206 1,201, 1,207 and 1,206 completed surveys.)





OPEN

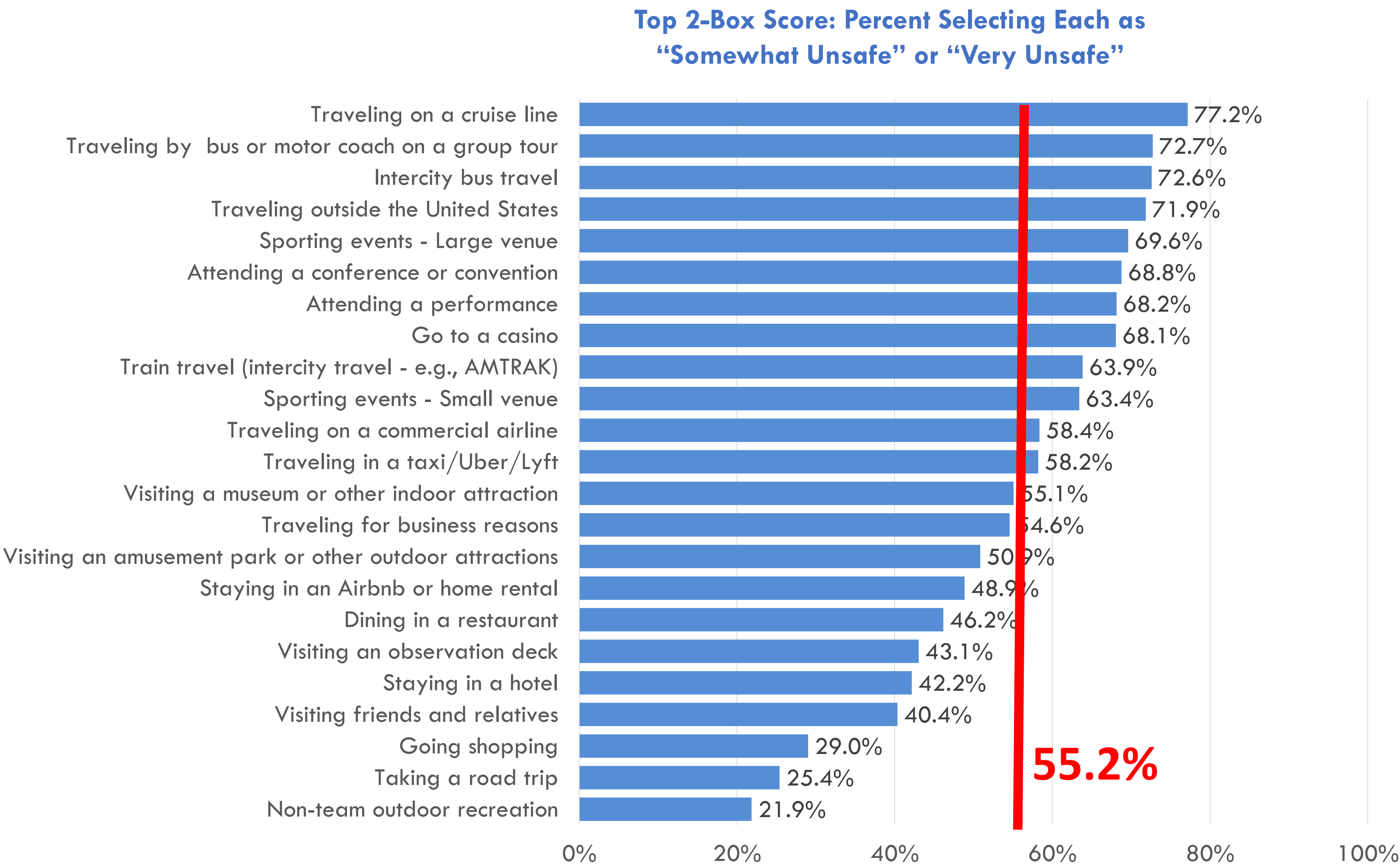
C L O S E D



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 43)

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

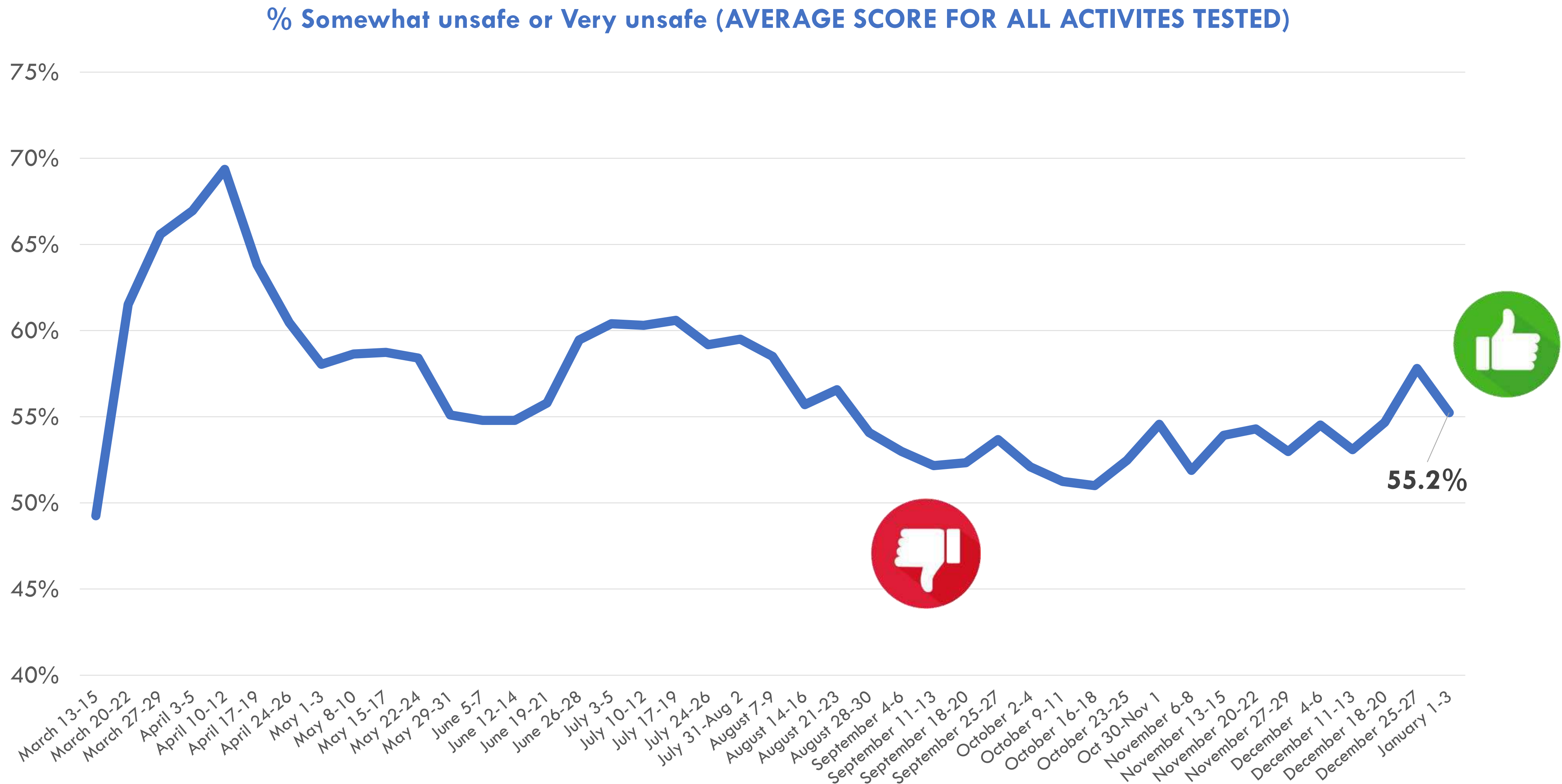
(Base: Wave 43 data. All respondents, 1,206 completed surveys.  
Data collected January 1-3, 2021)





# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-43 COMPARISON)

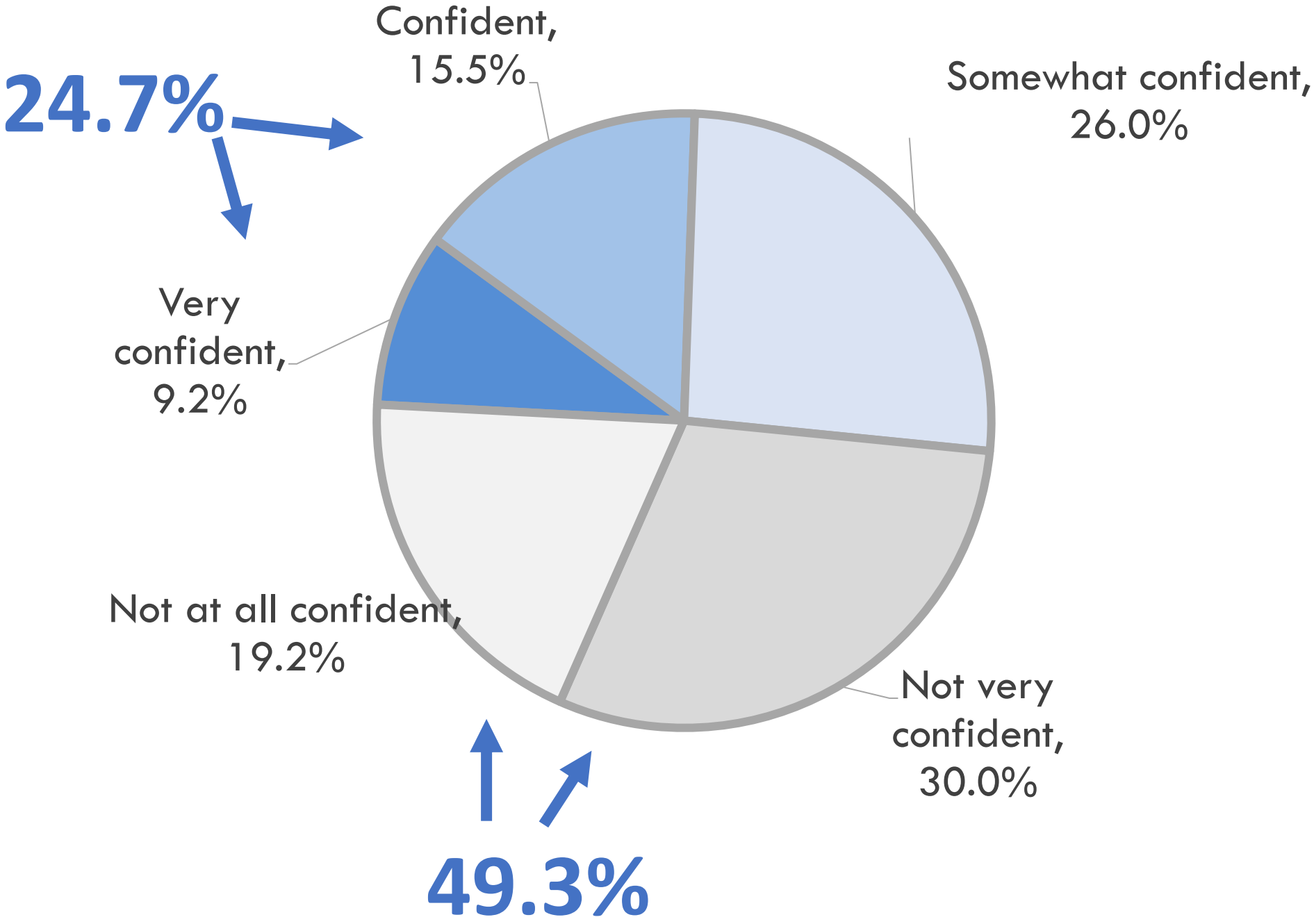
**Question:** At this moment, how safe would you feel doing each type of travel activity?





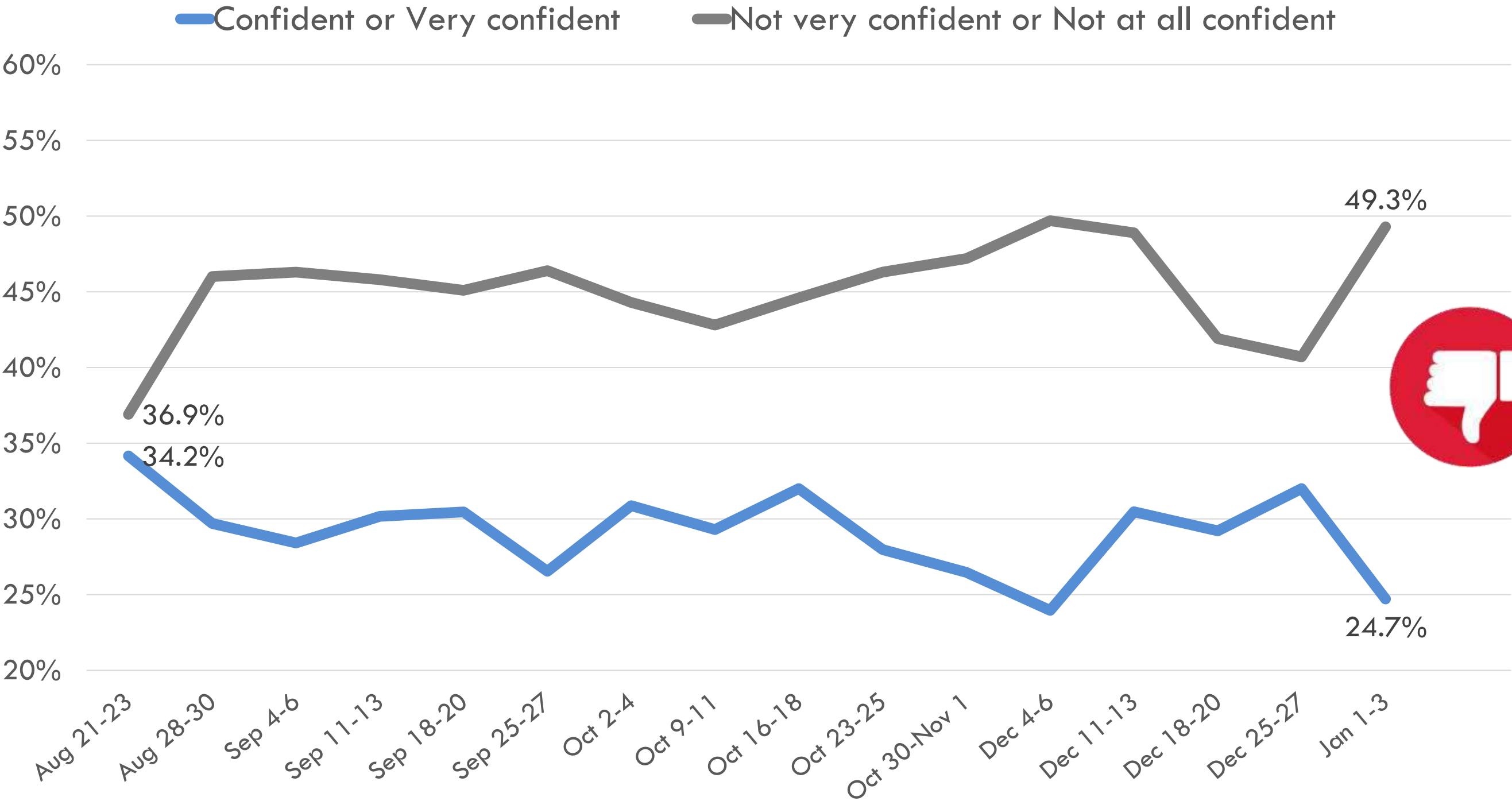
# CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



(Base: Wave 24-34 and 39-43 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, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data





# EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13, 2020 – JANUARY 3, 2021



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)

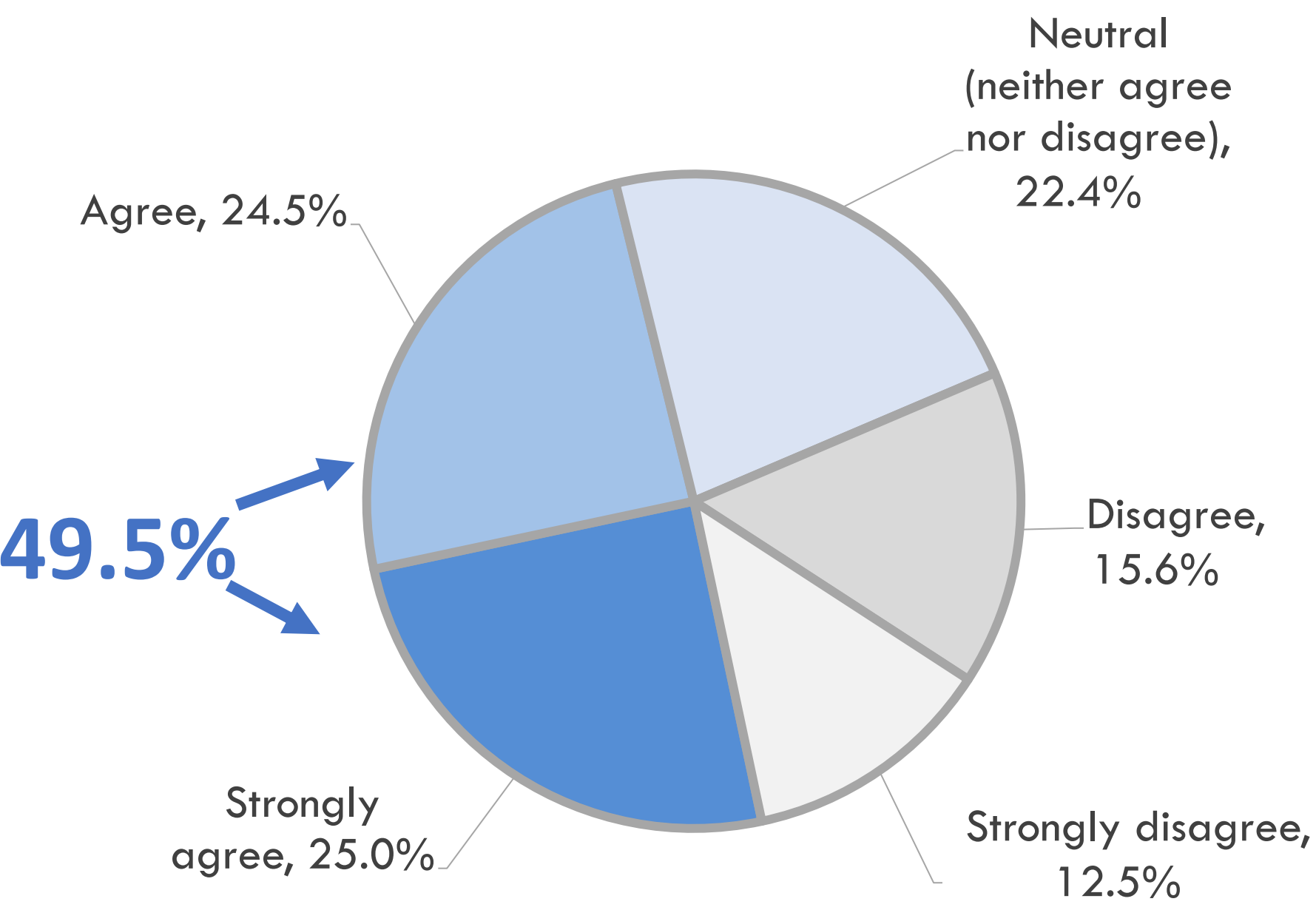
(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)



# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

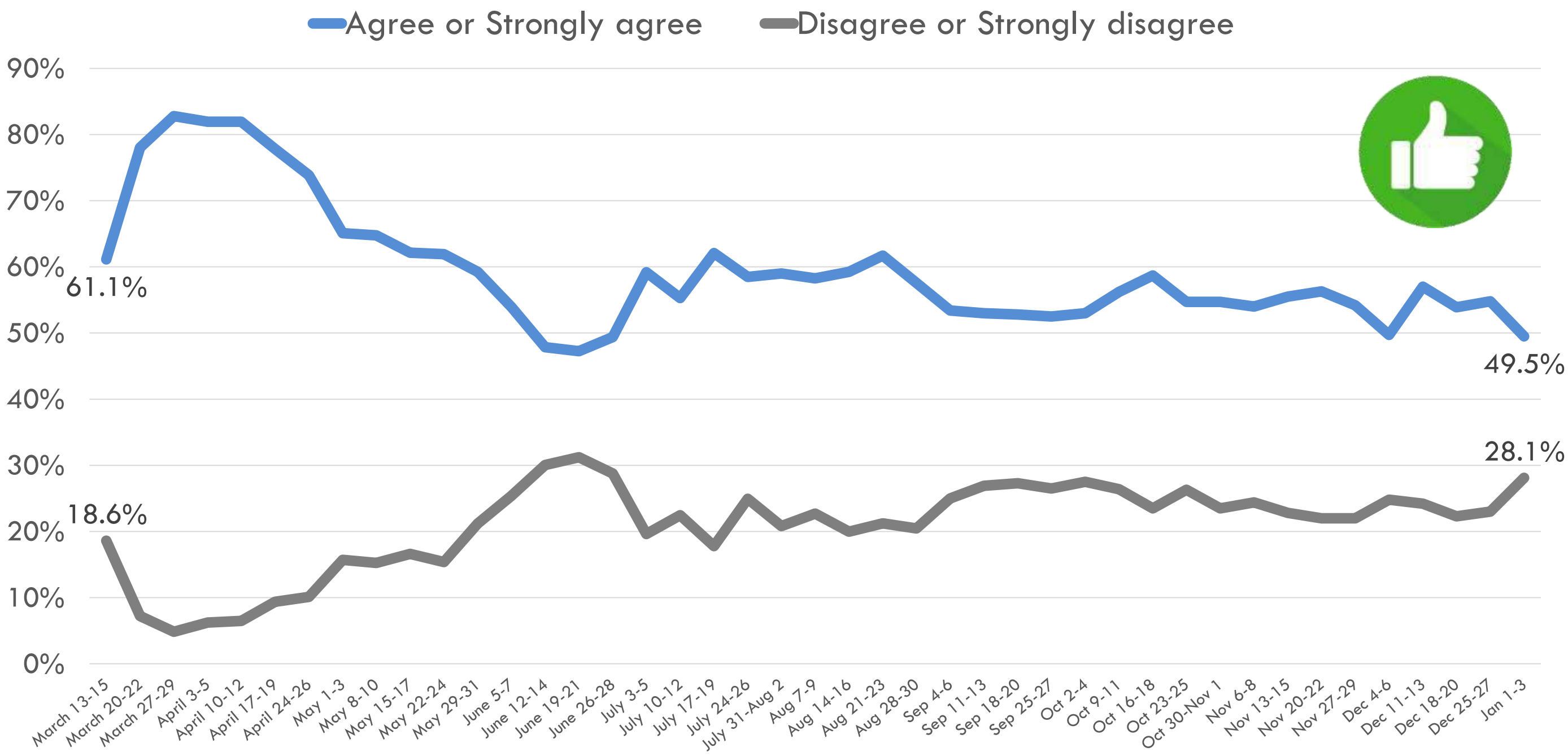
How much do you agree with the following statement?

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



(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data

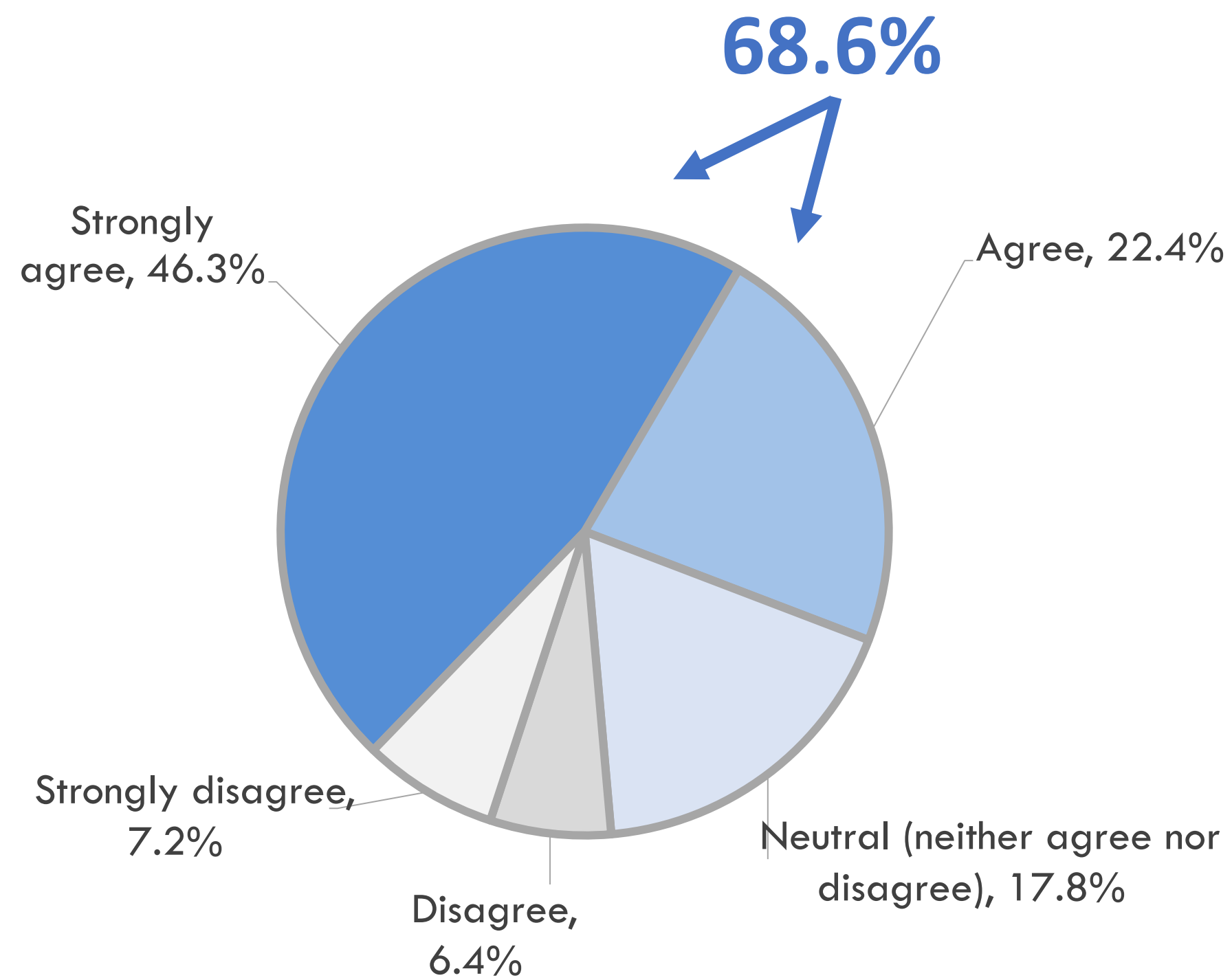




# AVOIDING CONVENTIONS & CONFERENCES

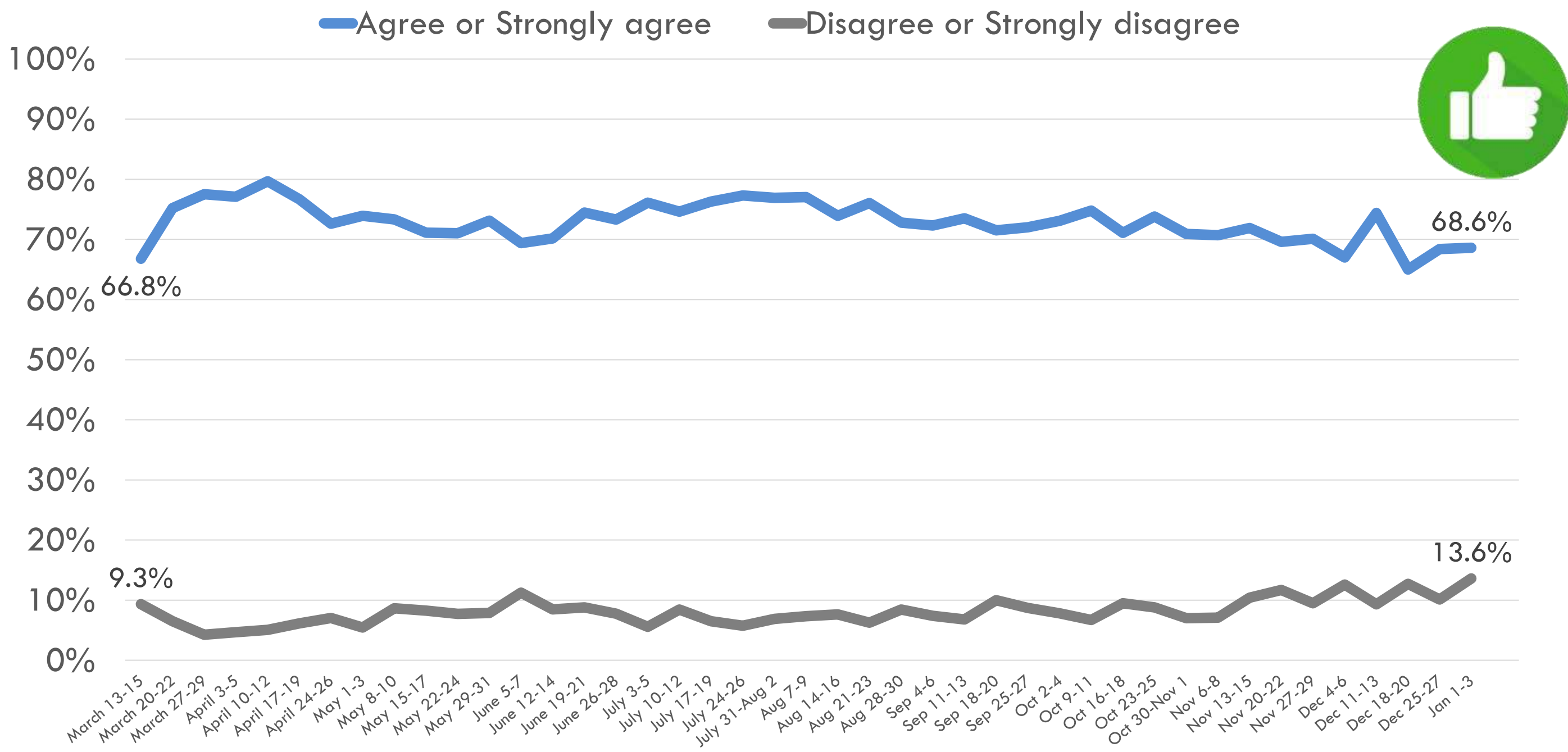
How much do you agree with the following statement?

**Statement:** I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data

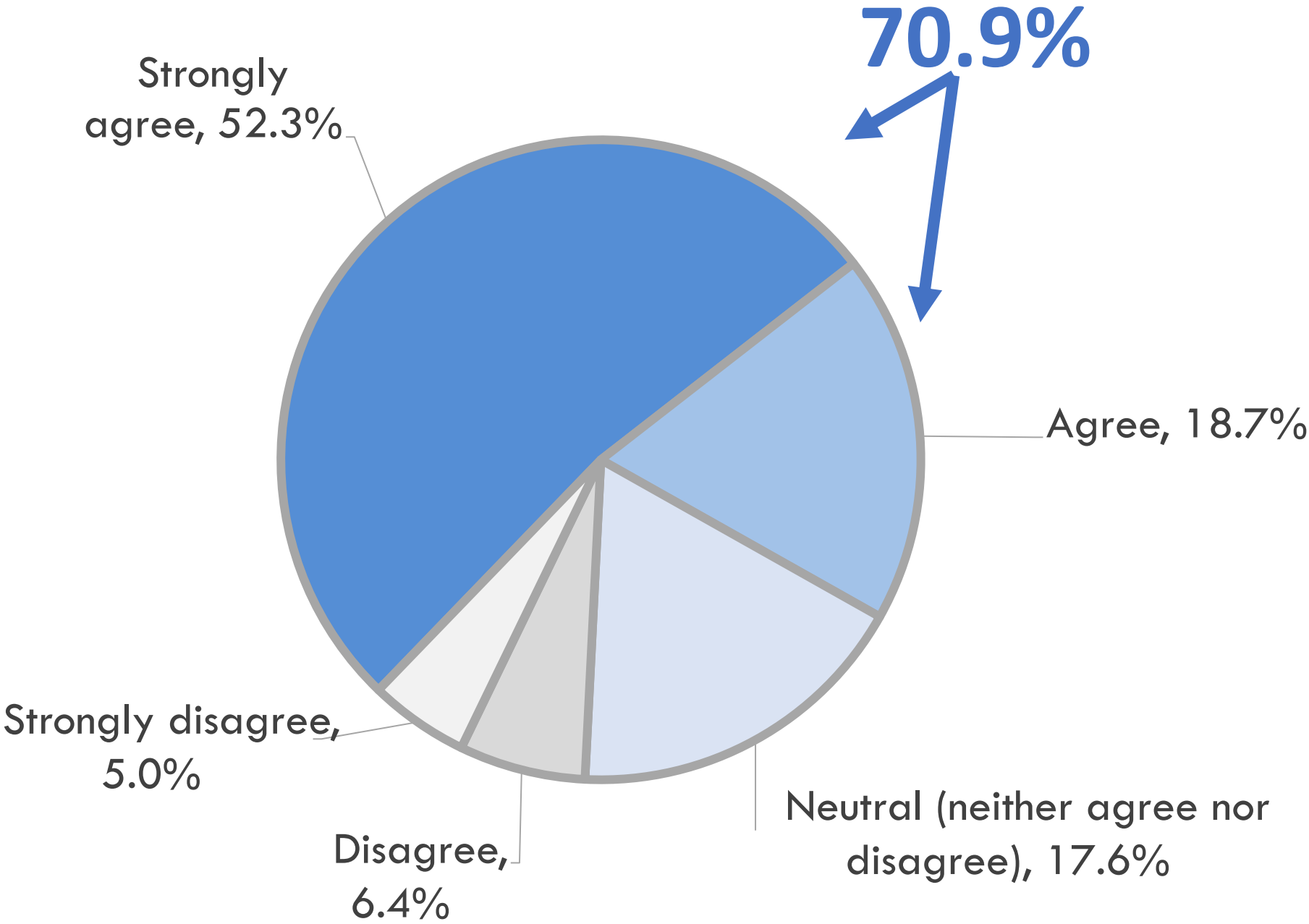




# AVOIDING INTERNATIONAL TRAVEL

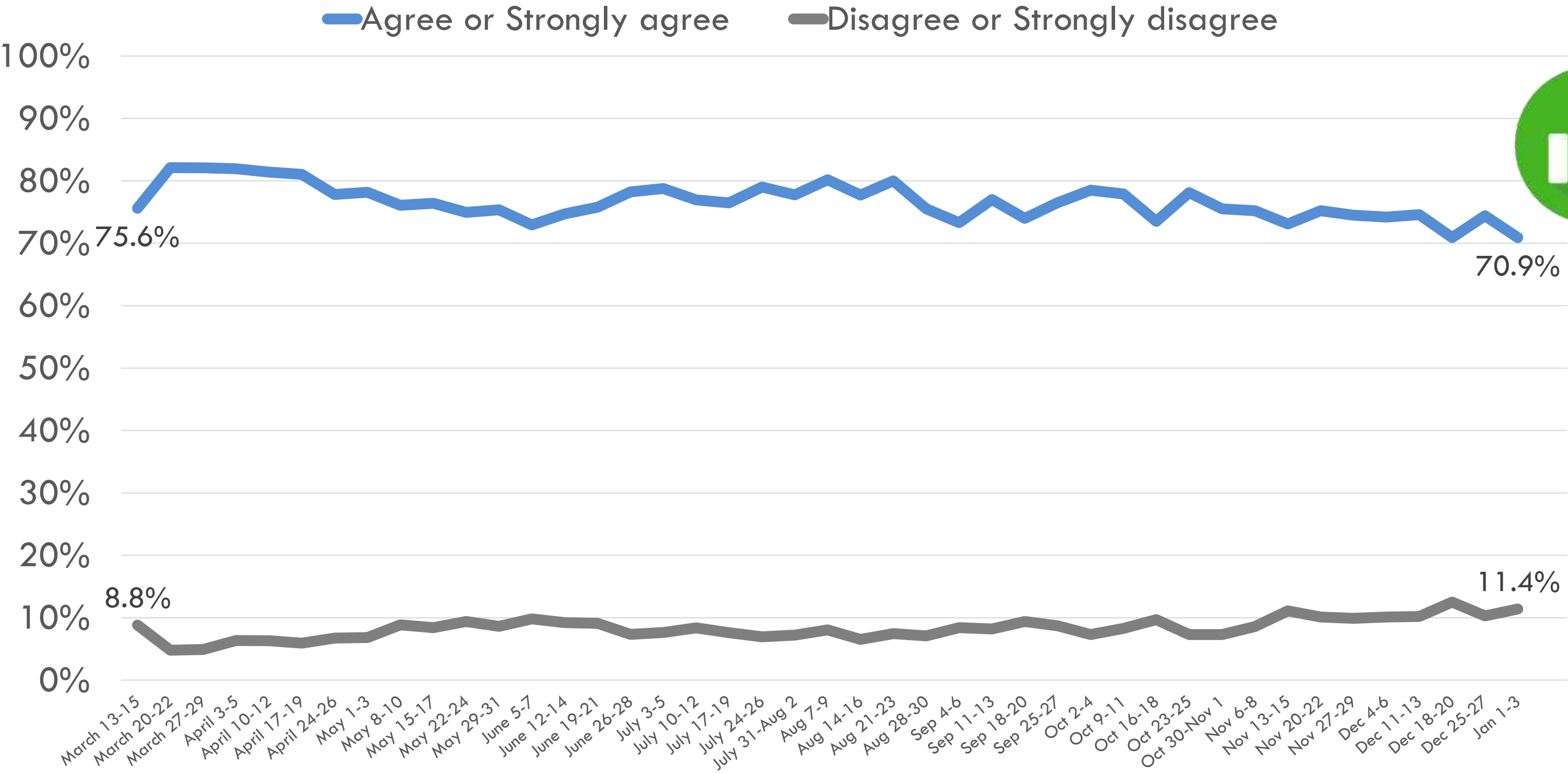
How much do you agree with the following statement?

**Statement:** I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data

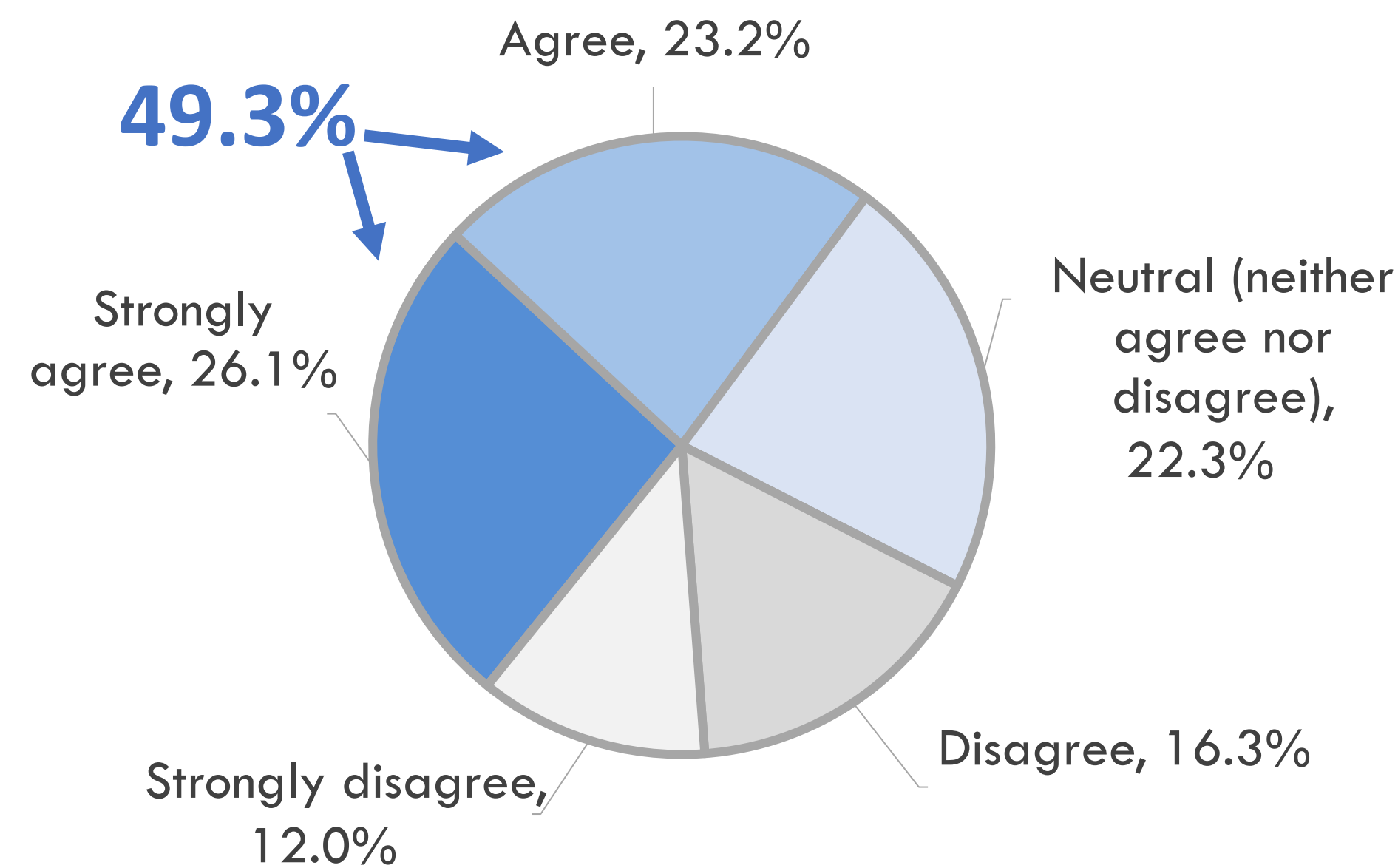




# TRAVEL GUILT

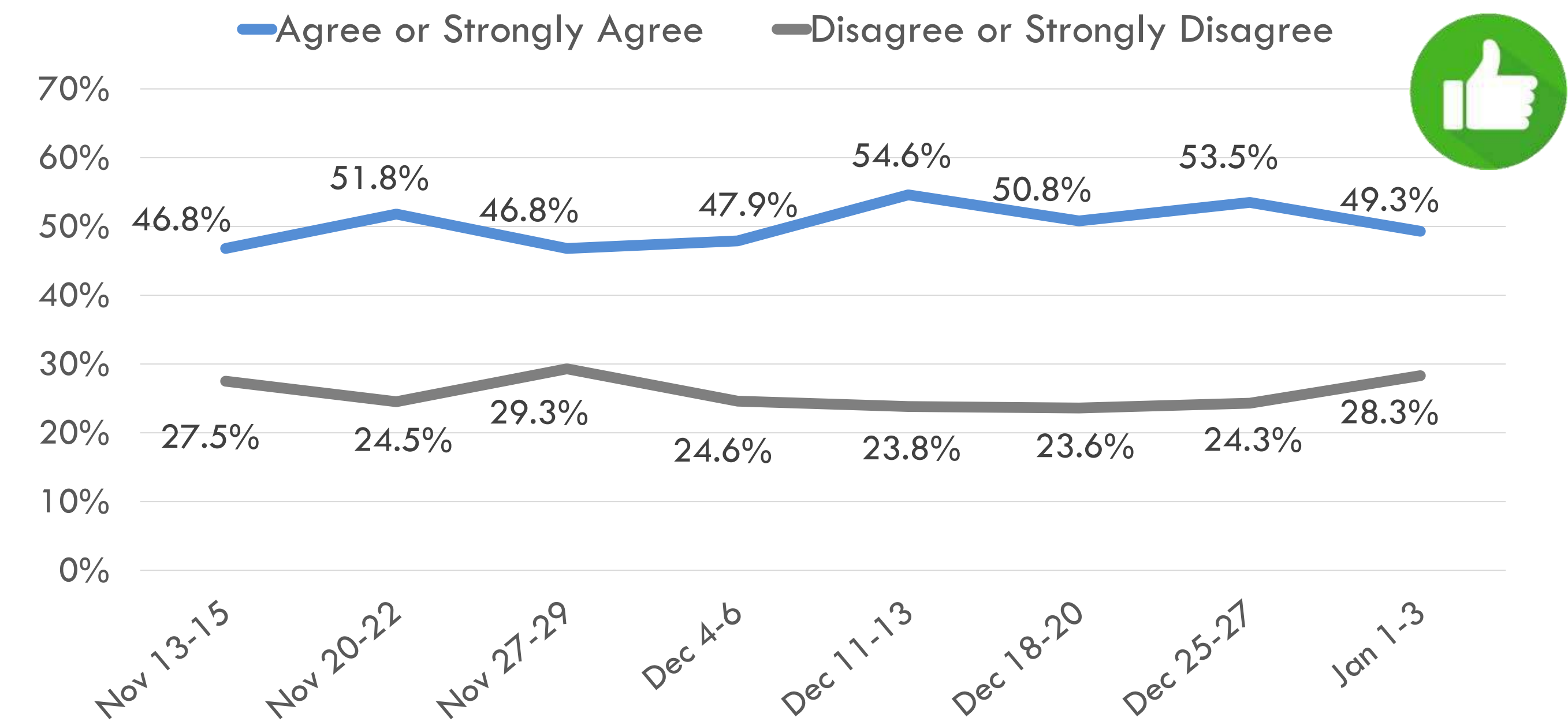
How much do you agree with the following statement?

**Statement:** I would feel guilty traveling right now.



(Base: Waves 36-43 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

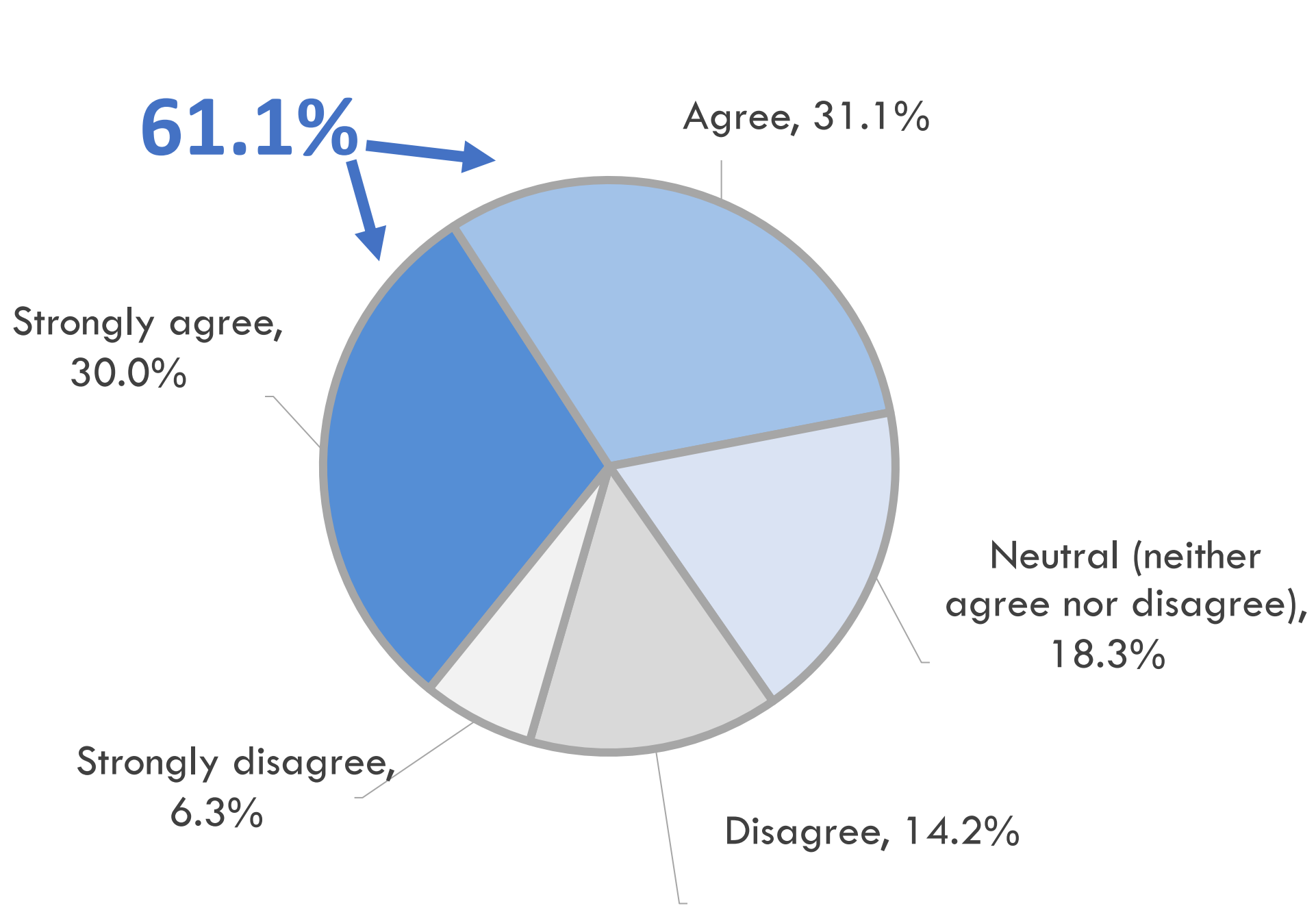
Historical data



# INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

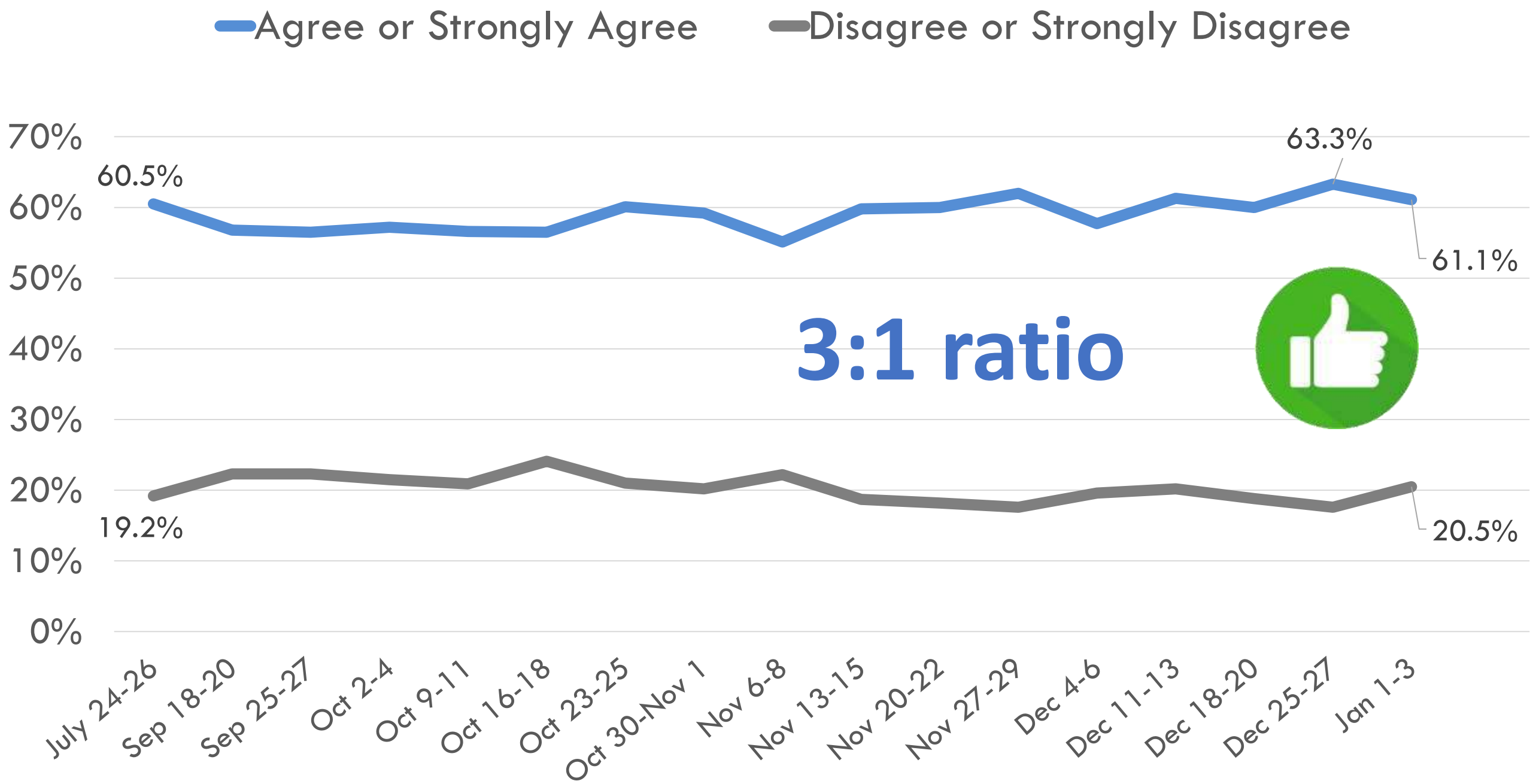
How much do you agree with the following statement?

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



(Base: Waves 20, 28-43 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data

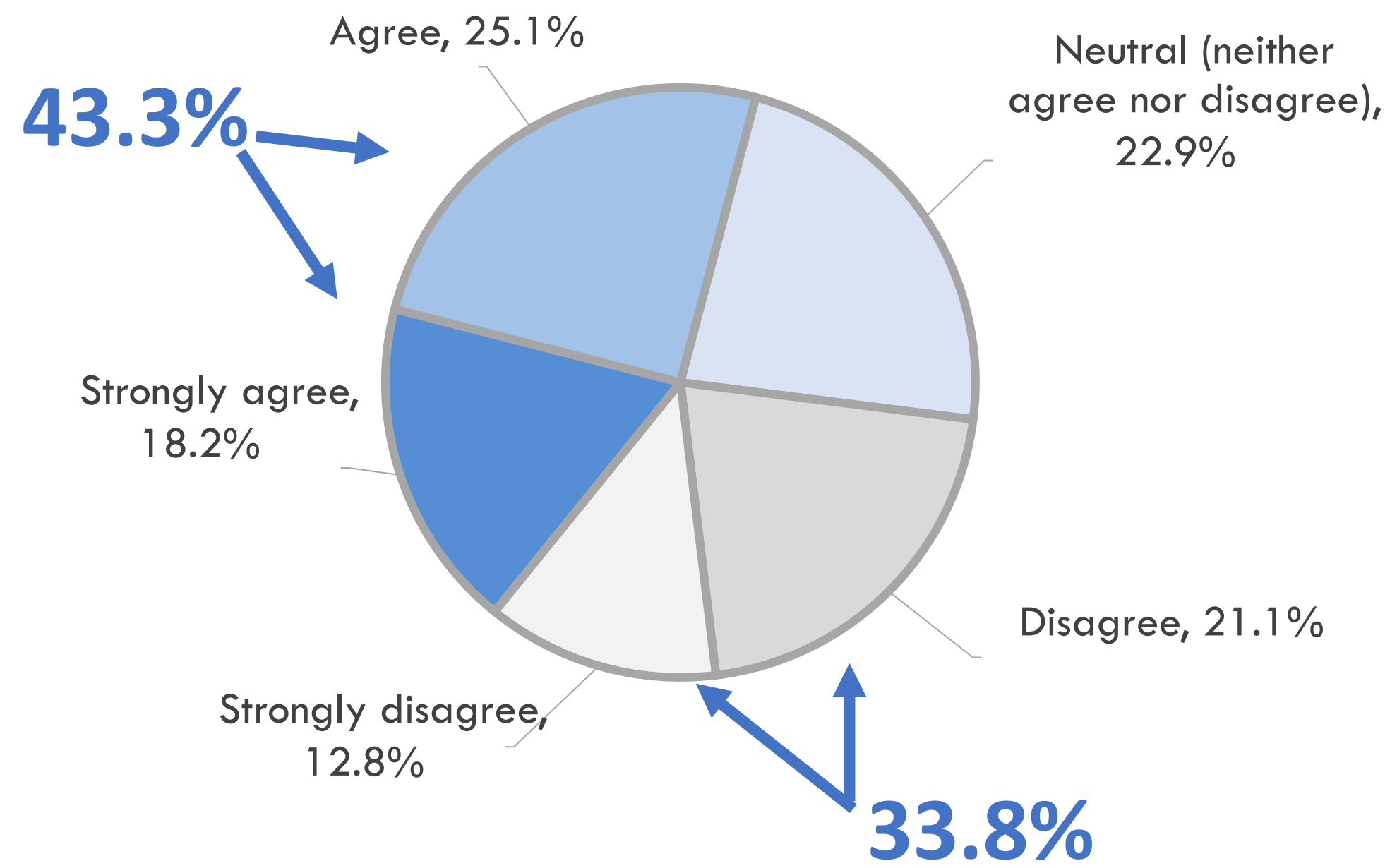




# LOSS OF INTEREST IN TRAVEL

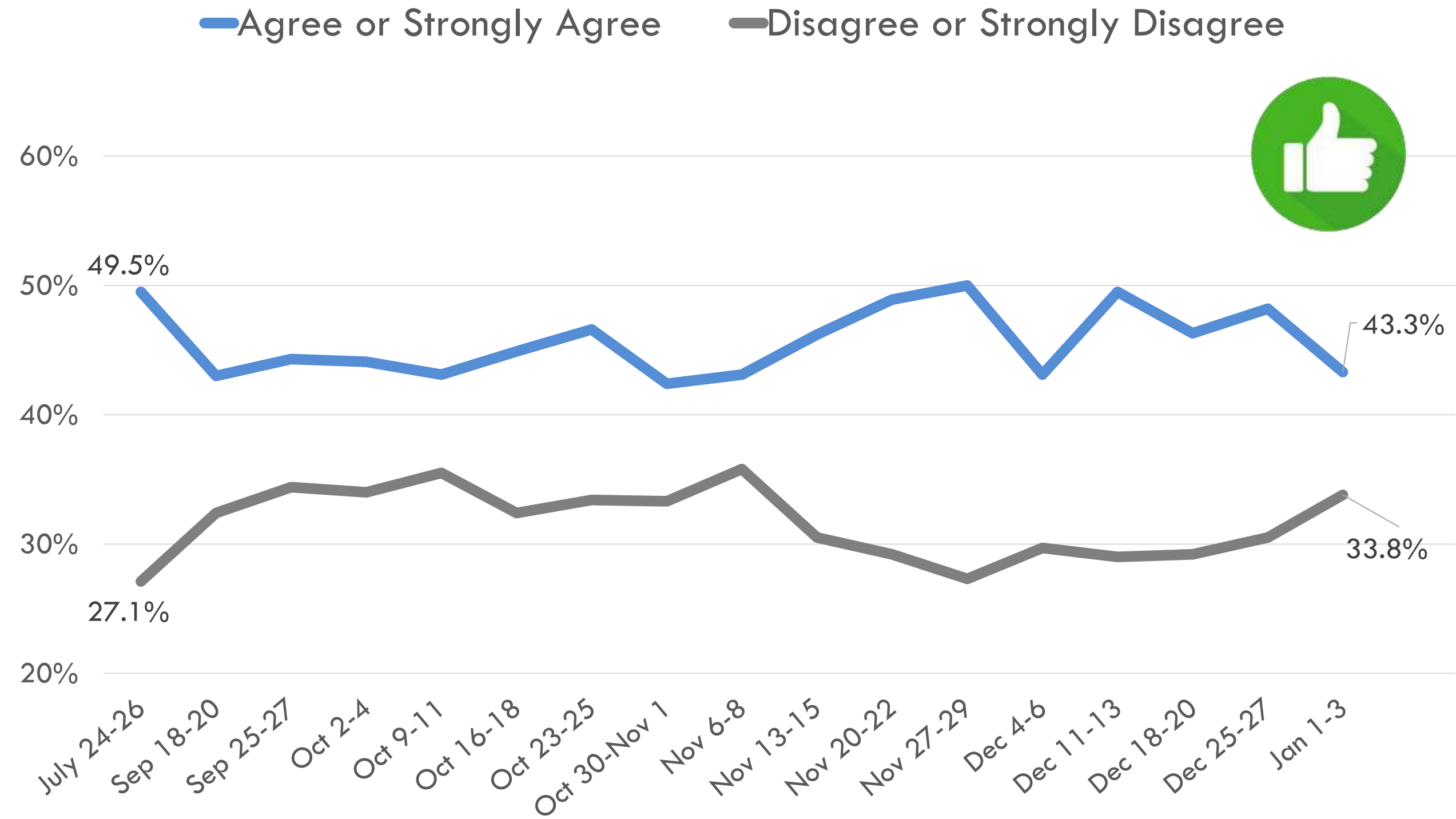
How much do you agree with the following statement?

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



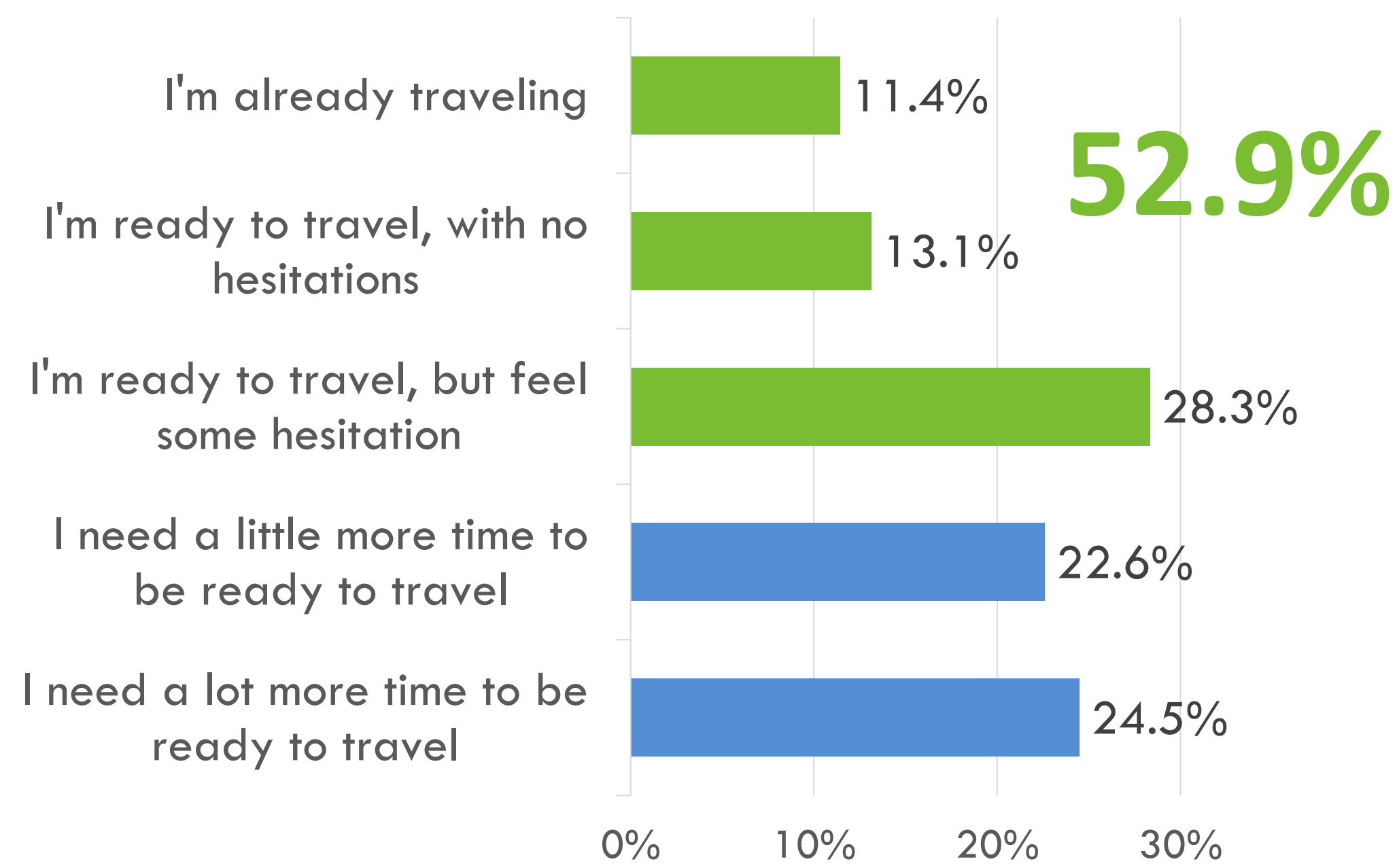
(Base: Waves 20, 28-43 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data



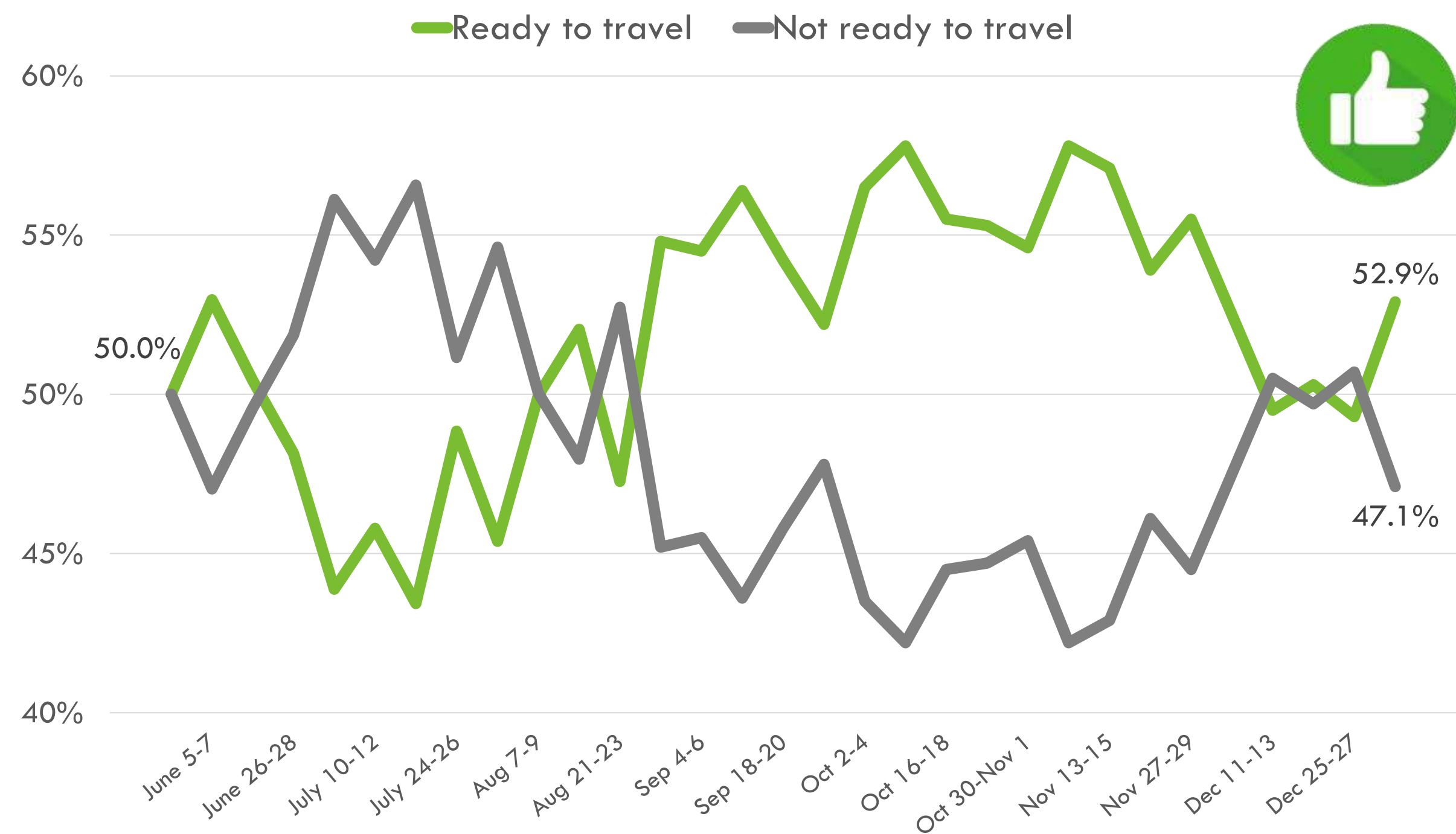
# TRAVEL STATE-OF-MIND

**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 15-43. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data



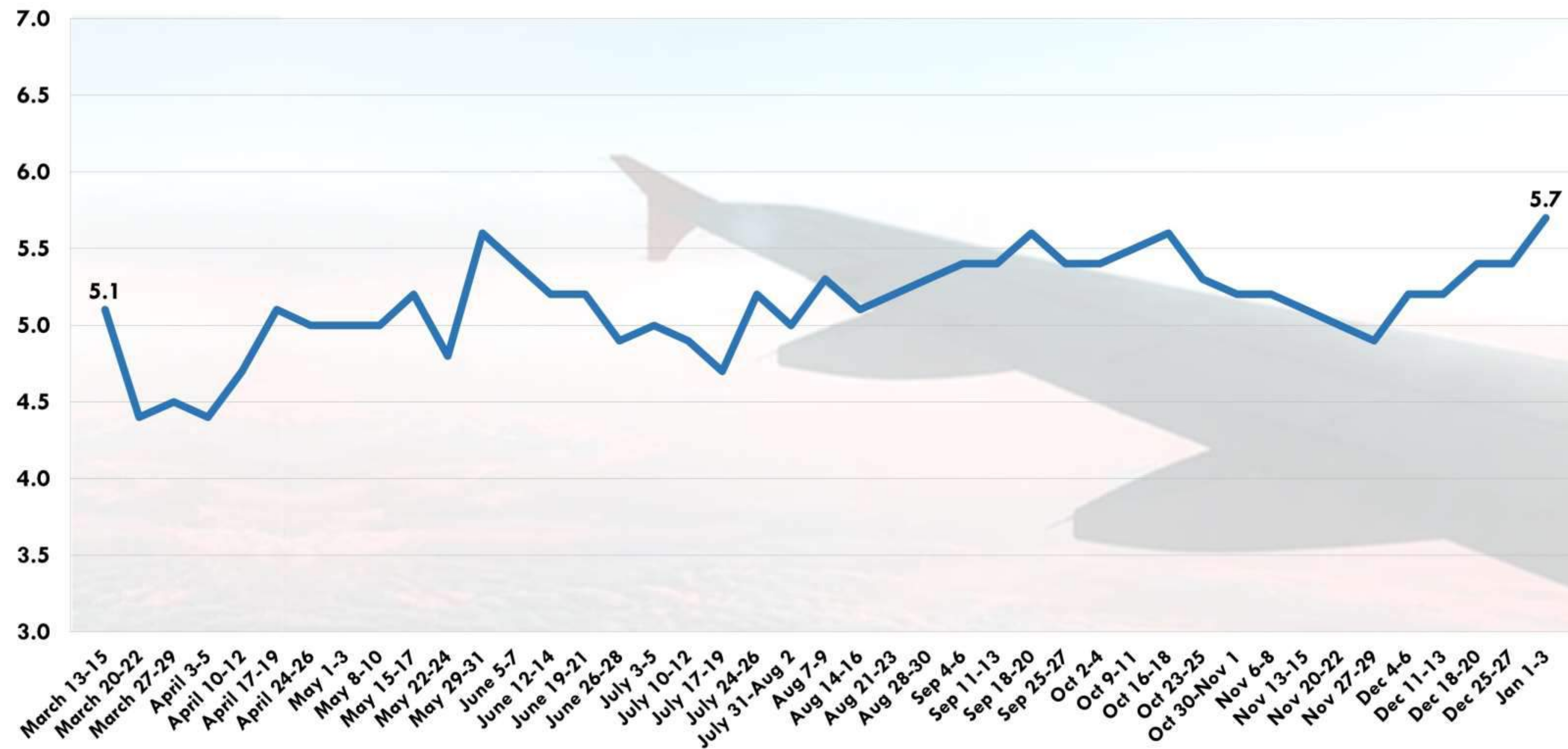


# OPENNESS TO TRAVEL INSPIRATION

MARCH 13, 2020 – JANUARY 3, 2021



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



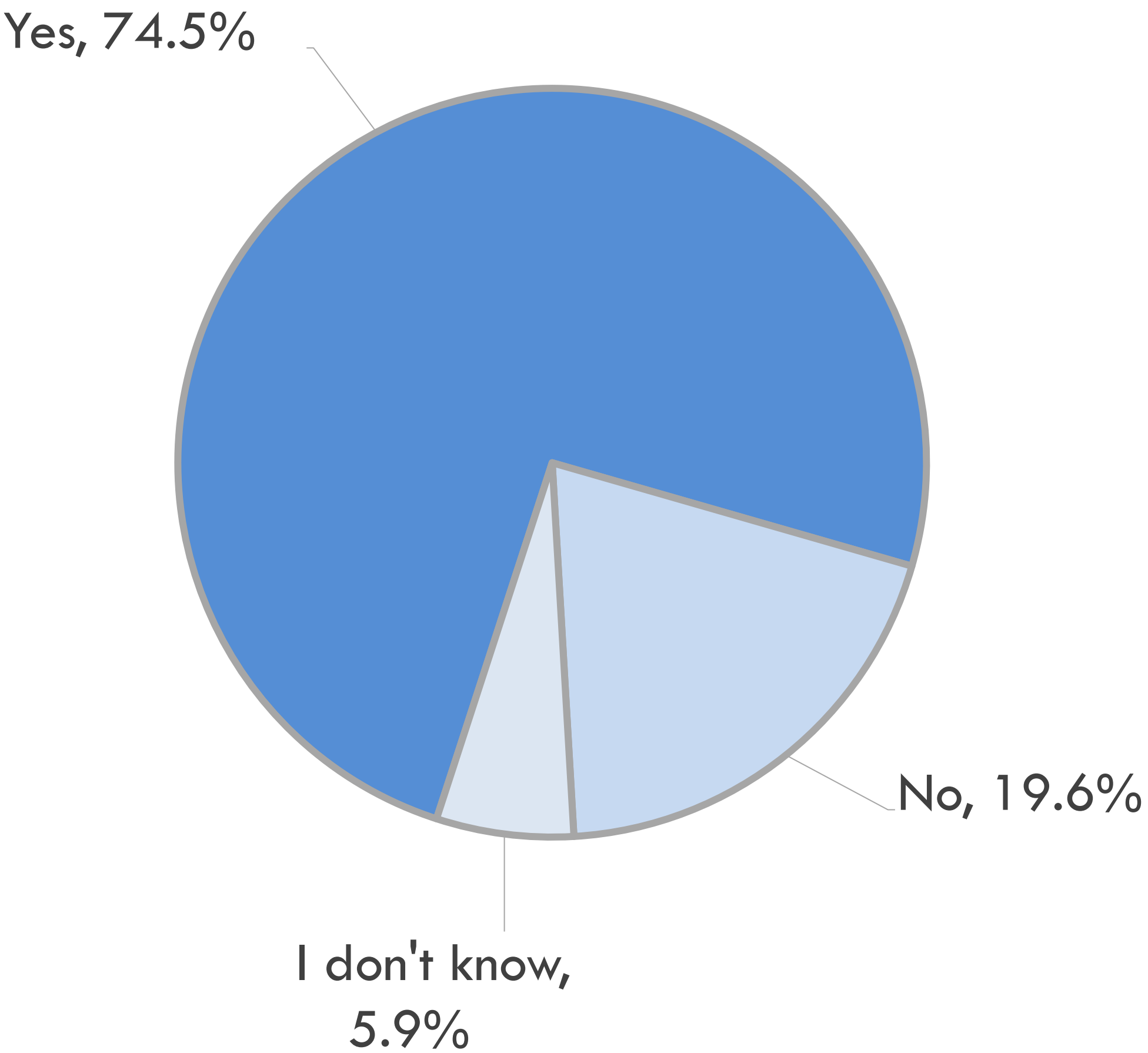
**QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?**

(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

# HAS PANDEMIC CHANGED NORMAL LEISURE TRAVEL PATTERNS

**Question:** Has the COVID-19 pandemic changed your normal leisure travel patterns in any way? (Select one)

*(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)*



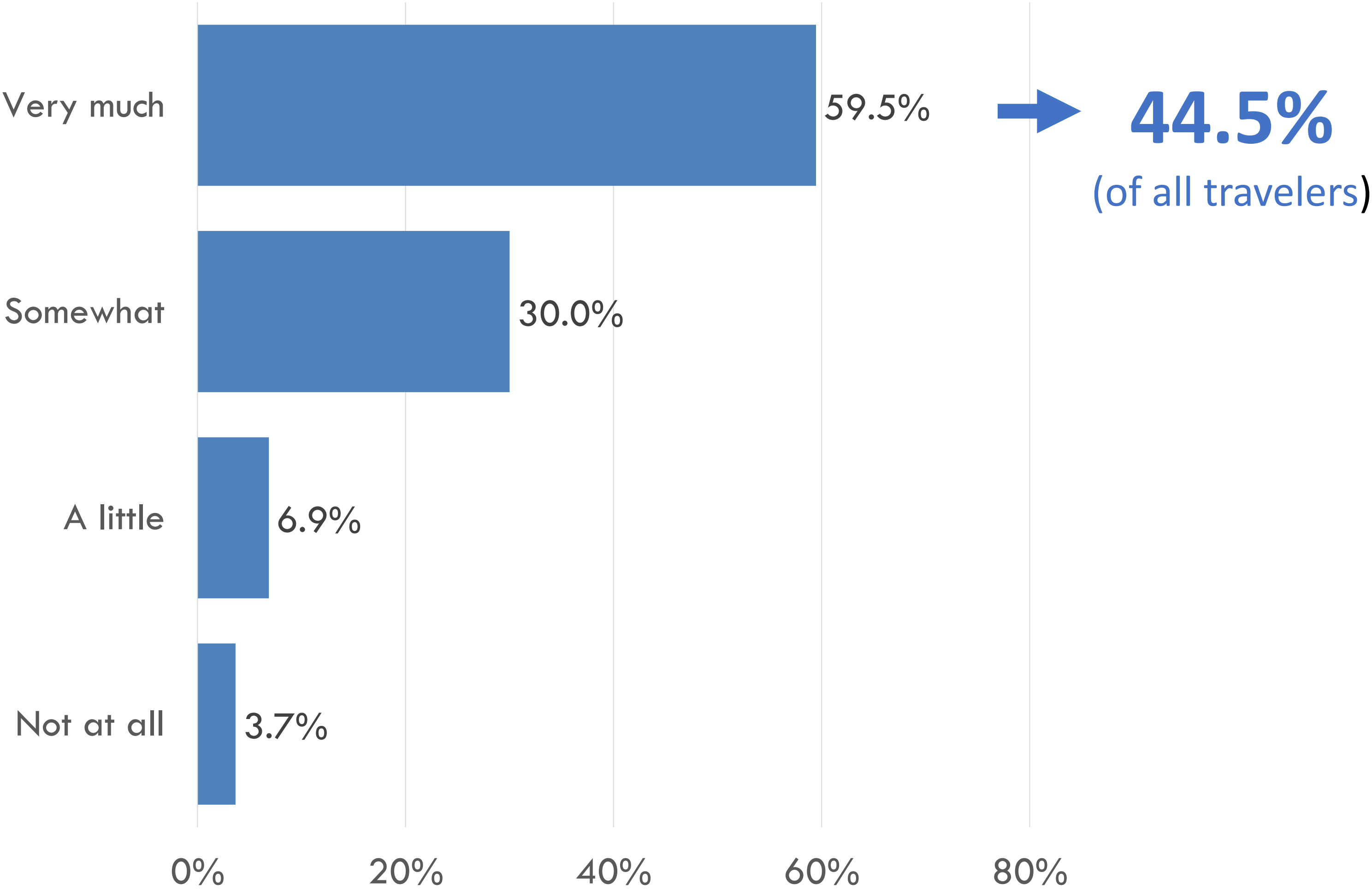


# HOW MUCH DO YOU MISS TRAVELING

**Question:** How much do you miss traveling? (Select one to fill in the blank)

**I miss traveling**

(Base: Waves 43 data. Respondents who have changed their travel patterns in response to the pandemic, 921 completed surveys. Data collected January 1-3, 2021)

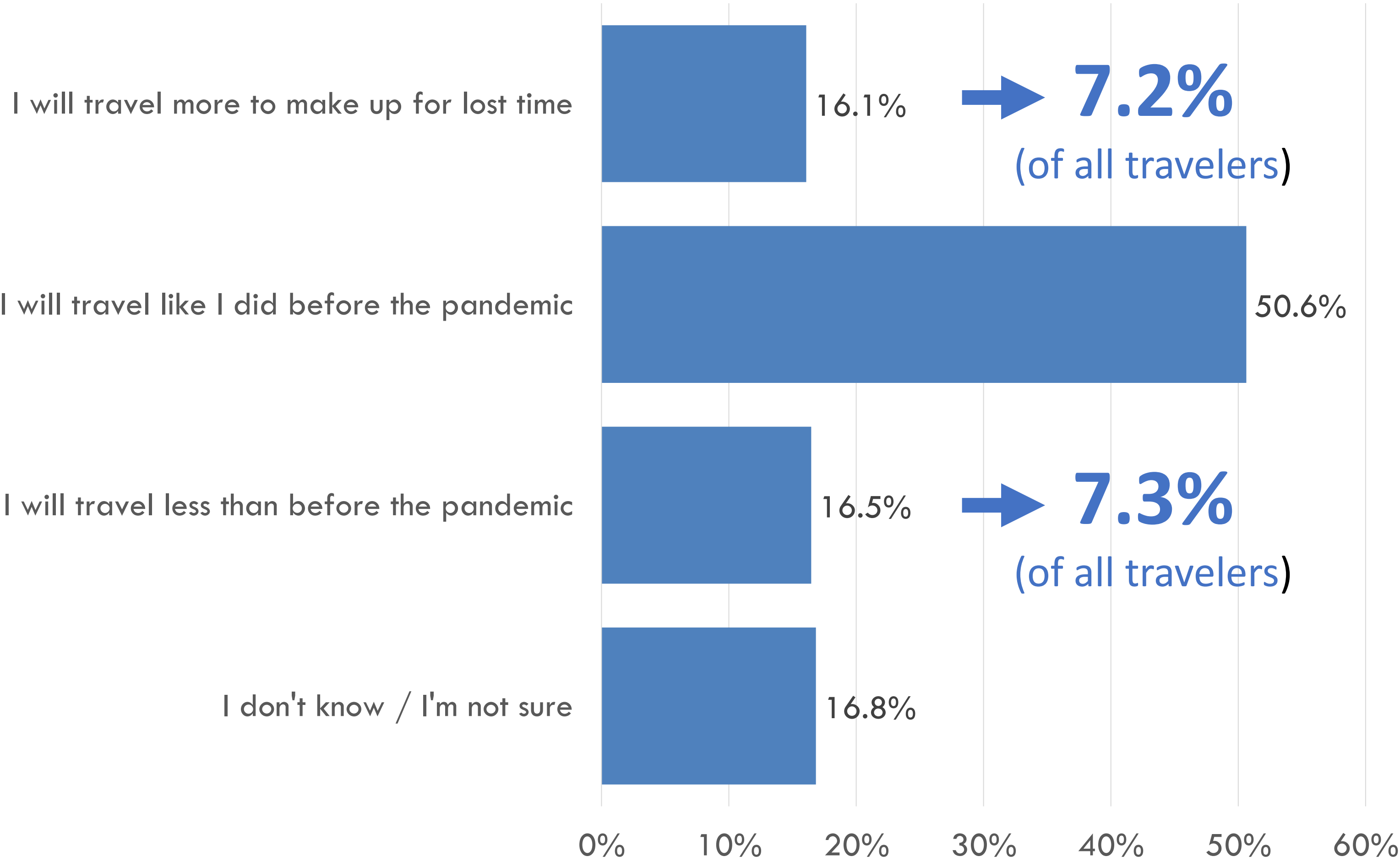


# APPROACH TO LEISURE TRAVEL AMONG THOSE WHO MISS IT MOST

**Question:** Please tell us how you're looking at the future right now.

Which best describes how you will approach leisure travel as life returns to normalcy (or near normalcy) after the COVID-19 pandemic?

*(Base: Waves 43 data. Respondents who miss travel to some degree, 892 completed surveys. Data collected January 1-3, 2020)*



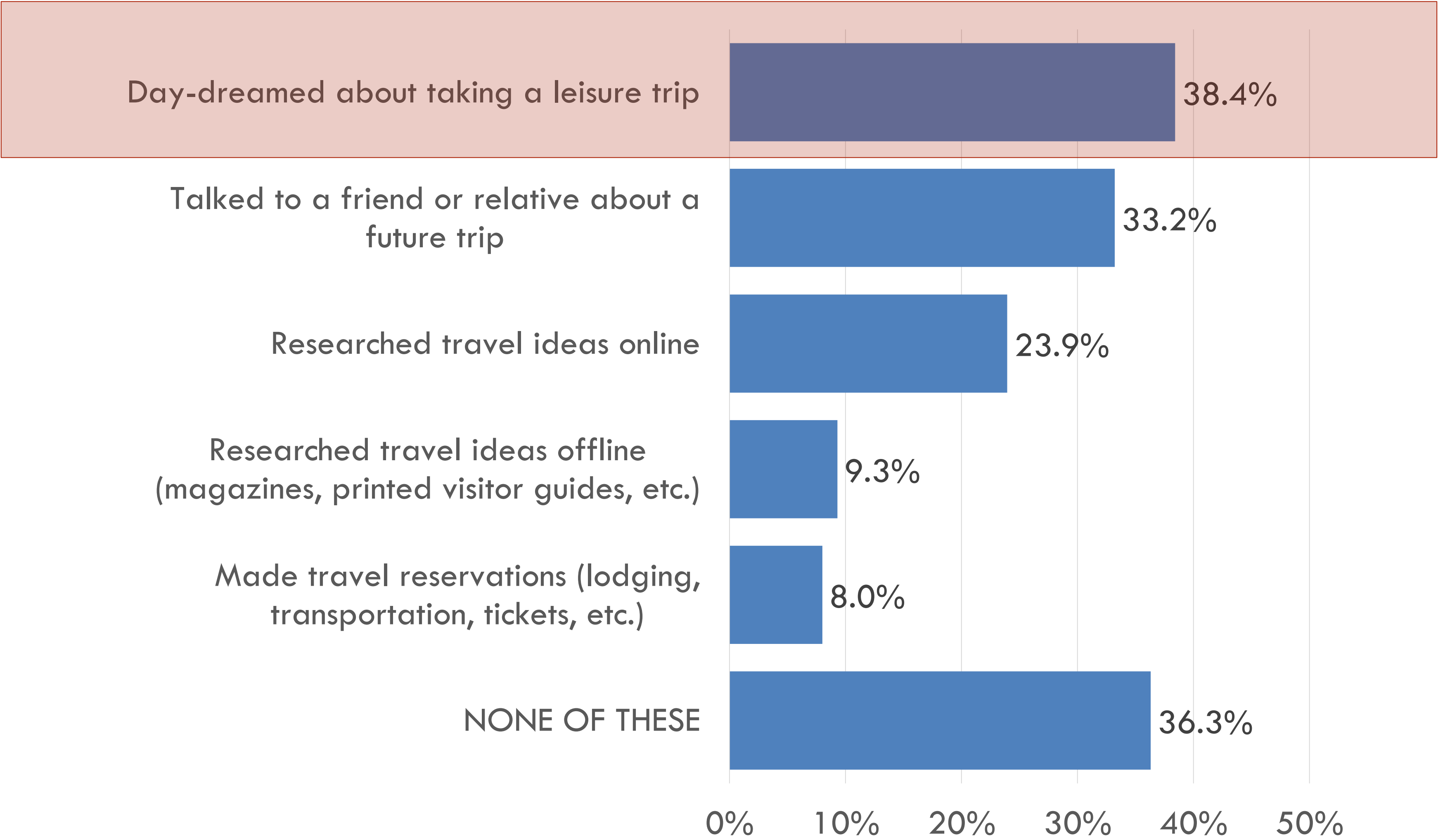


# AMERICANS' TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)







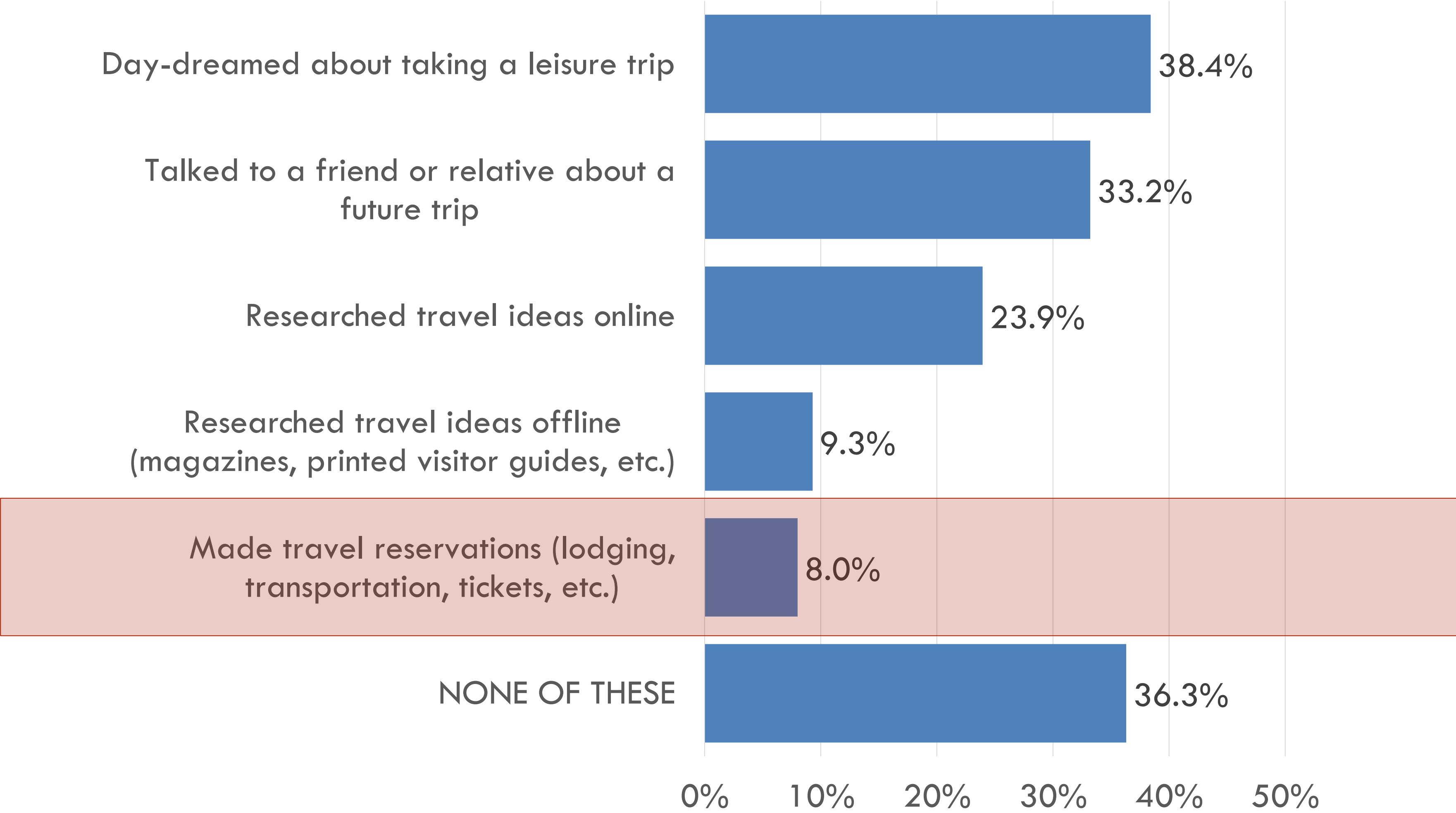


# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have

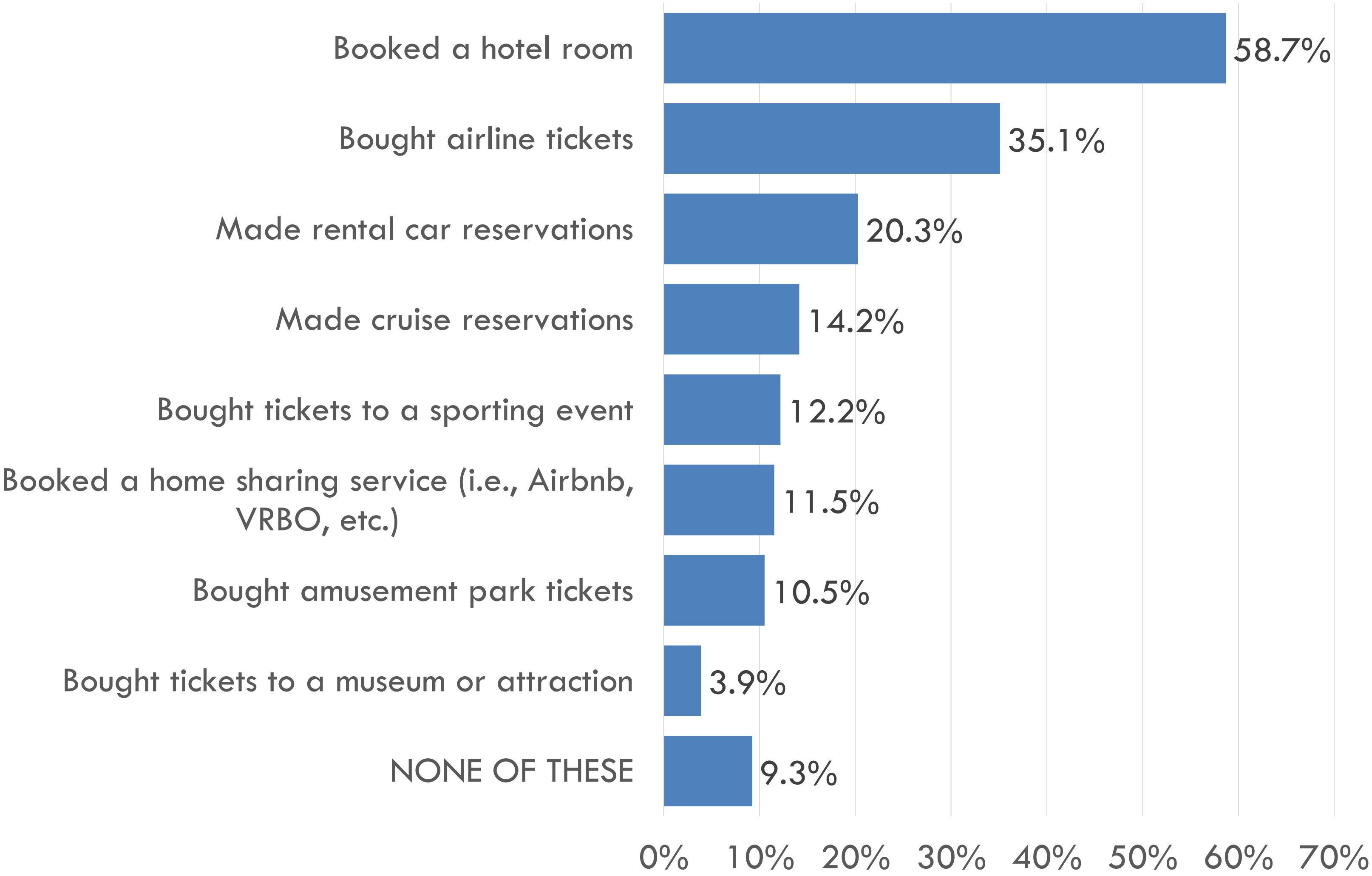
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



# TRAVEL RESERVATIONS MADE IN THE PAST WEEK

**Question:** Which of these travel reservations did you make this week? (Select all that apply)

*(Base: Waves 43 data. Respondents who made travel reservations this week, 94 completed surveys. Data collected January 1-3, 2021)*





# KEY TAKEAWAYS

- **Coronavirus concerns remain strong, particularly as related to finances and the economy this week**
- **Feelings of safety around travel have been adversely impacted for now**
- **Nevertheless, Americans are easing their feelings of travel avoidance for the future and their travel readiness mindset has grown**
- **Americans are more open to travel inspiration than at any point during the pandemic**
- **Travel is missed—exhibited through daydreaming, sharing with friends and family, and researching travel ideas online**





# LOOKING AHEAD

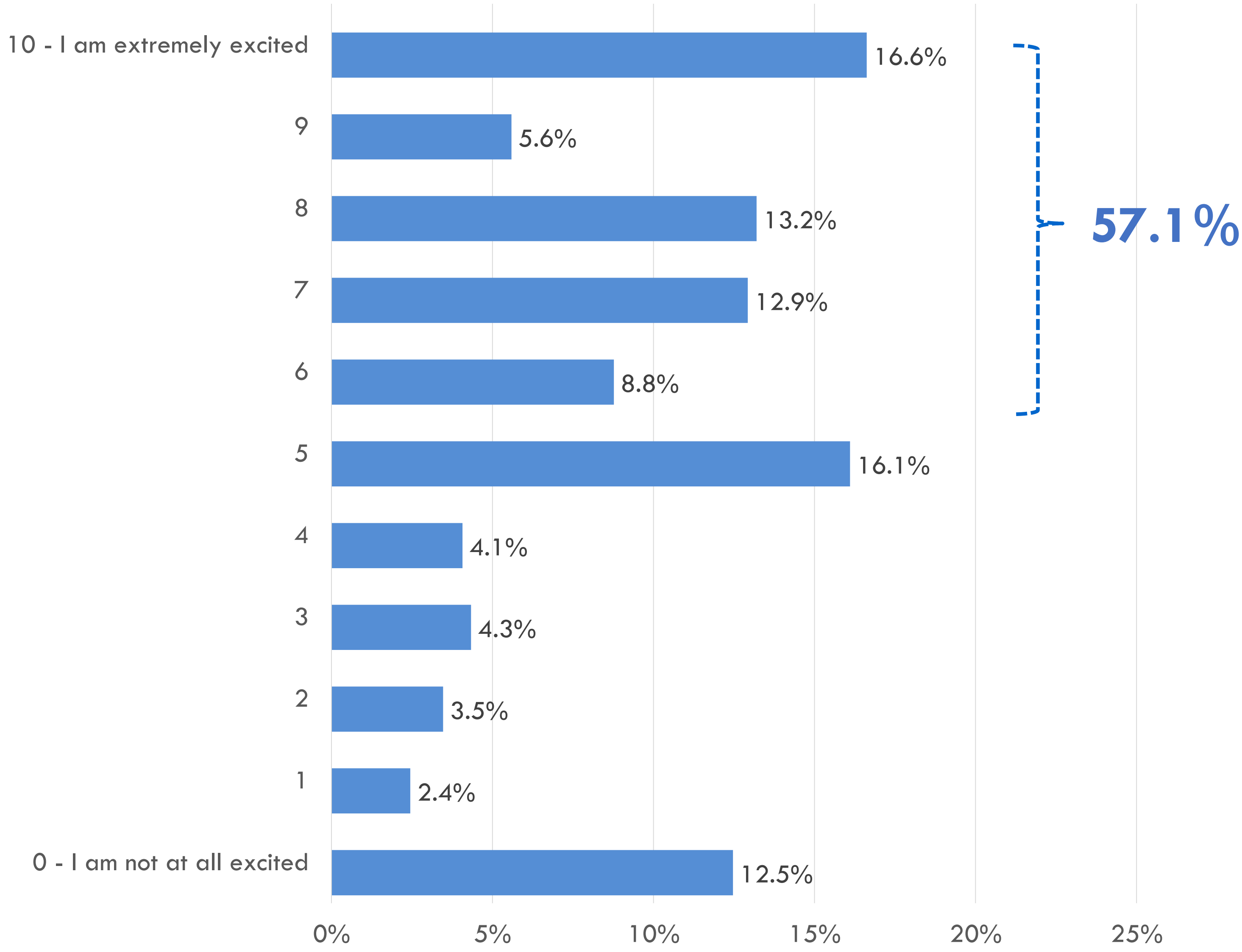




# EXCITEMENT ABOUT TRAVEL IN 2021

**Question:** Which best describes how excited you are about LEISURE TRAVEL this upcoming year (2021)?

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



# The Most Excited to Travel: A Profile

- Plan to take 4.3 leisure trips this year
- They expect to take their next commercial airline trip within the first 4 months of this year
- Can be motivated by discounts and deals to travel in the near-term
- The majority are more optimistic about life returning to normal and being able to travel safely in the next 6 months due to vaccine developments
- Nearly half have started planning future travel in anticipation of the vaccine being widely available
- Over 40 percent researched travel ideas online in the past week
- More affluent (average HHI: \$99K), but no other major demographic differences from other travelers





2020

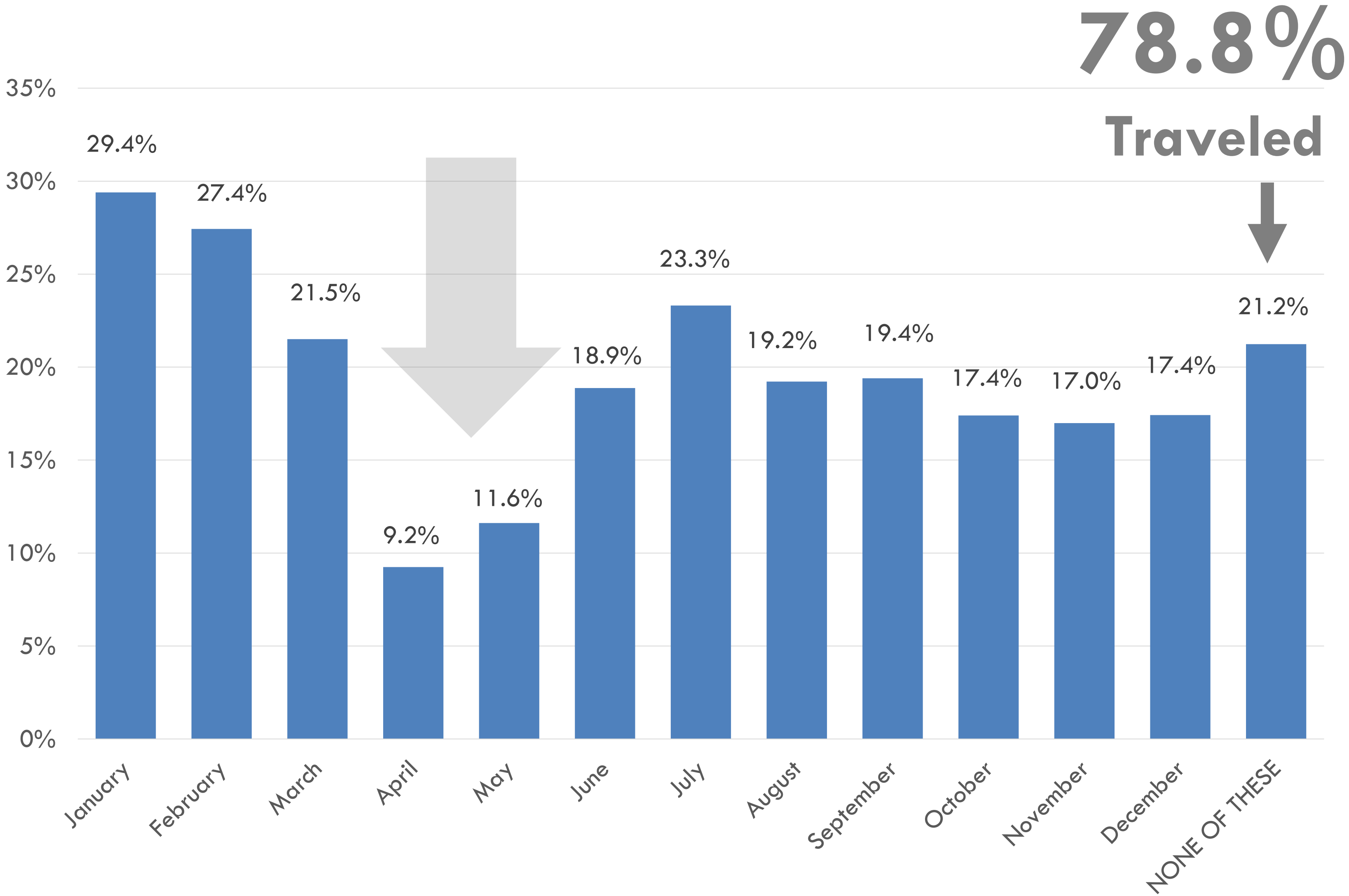


2021

# MONTHS TRIPS WERE TAKEN IN 2020

**Question:** In which month(s) of 2020 did you travel for any reason? (Select all the months you traveled)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

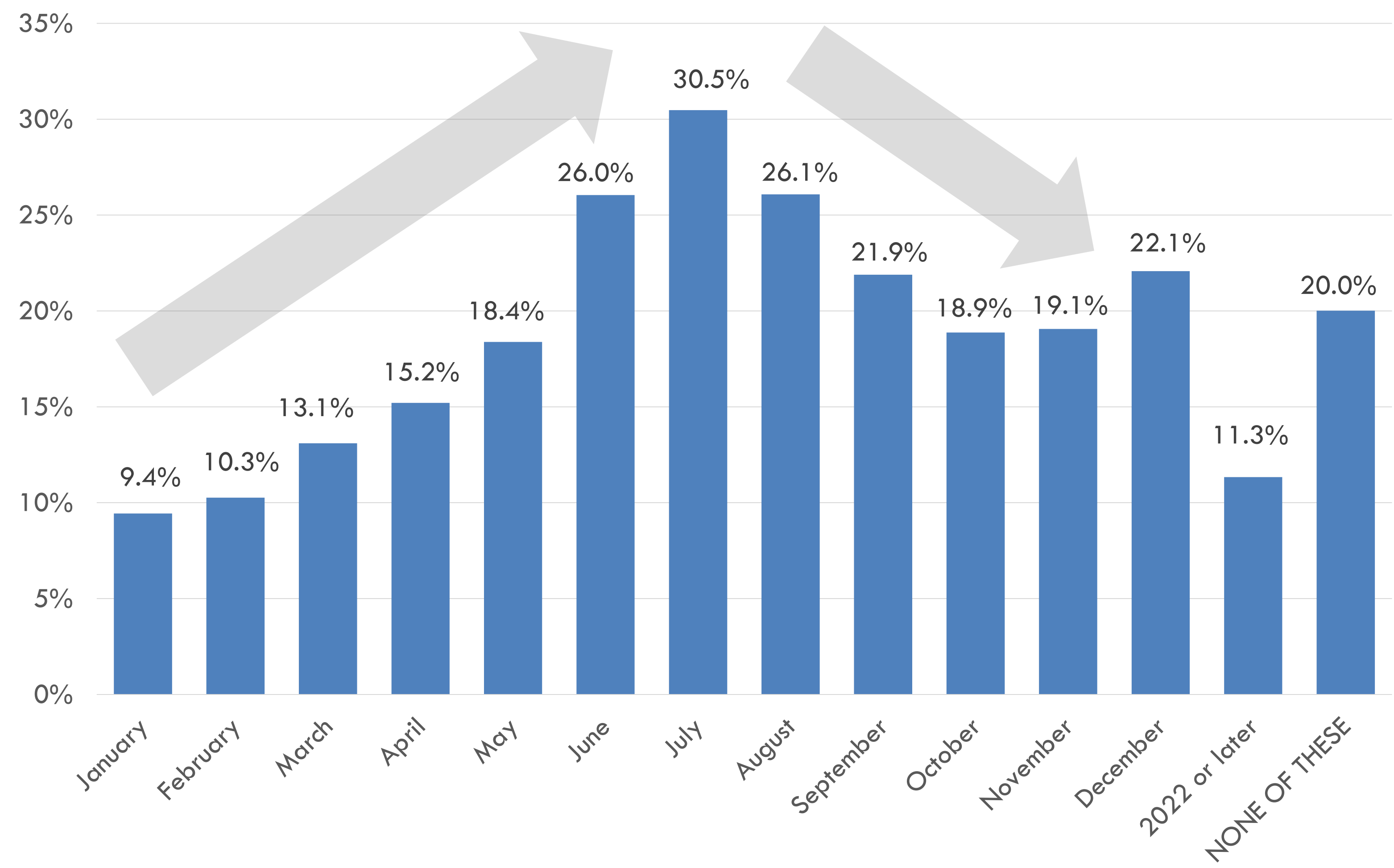




# EXPECTED LEISURE TRIPS IN 2021

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

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

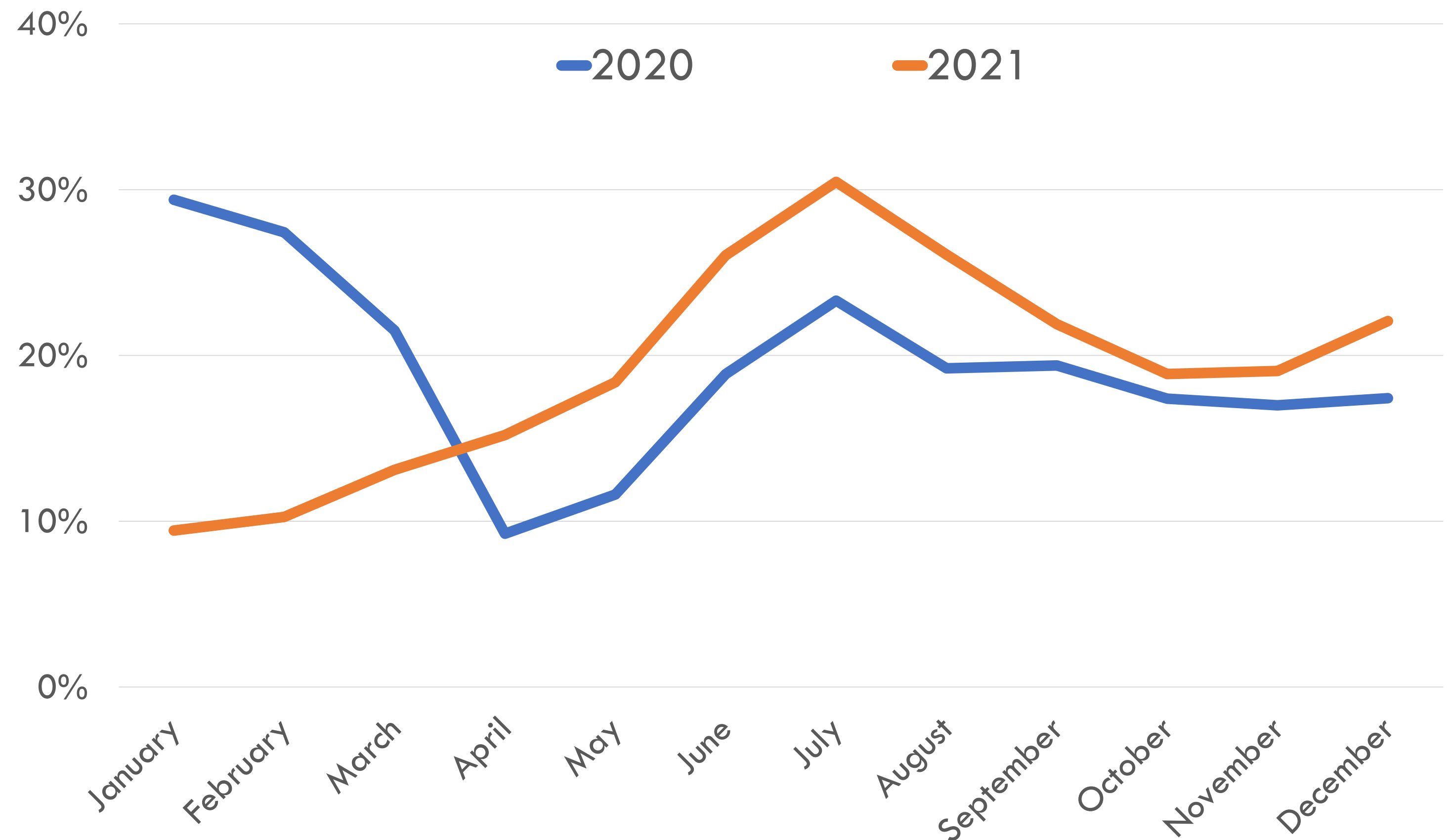


# 2020 VS. EXPECTED 2021: MONTH OF LEISURE TRAVEL

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

**Question:** In which month(s) of 2020 did you travel for any reason? (Select all the months you traveled)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

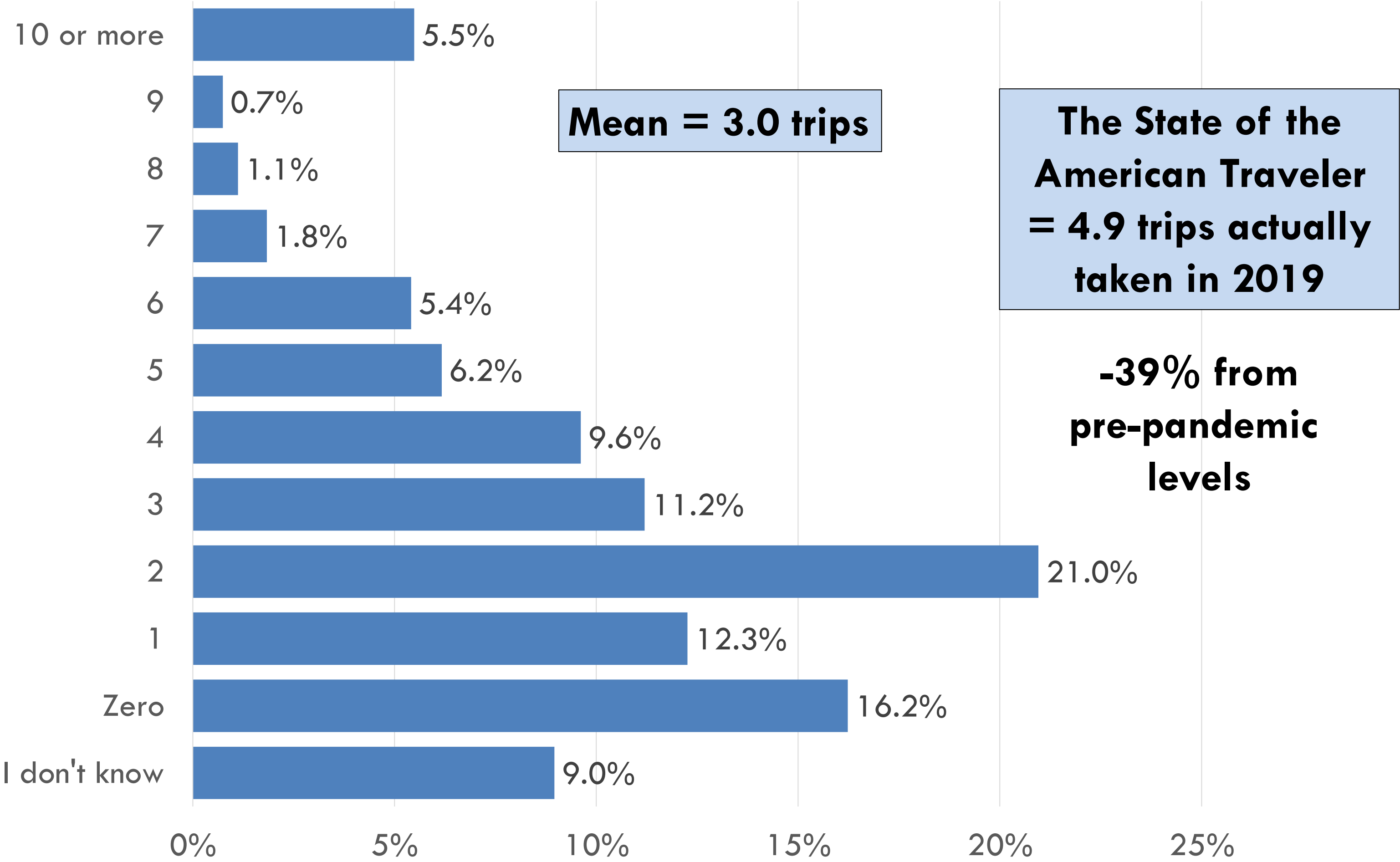


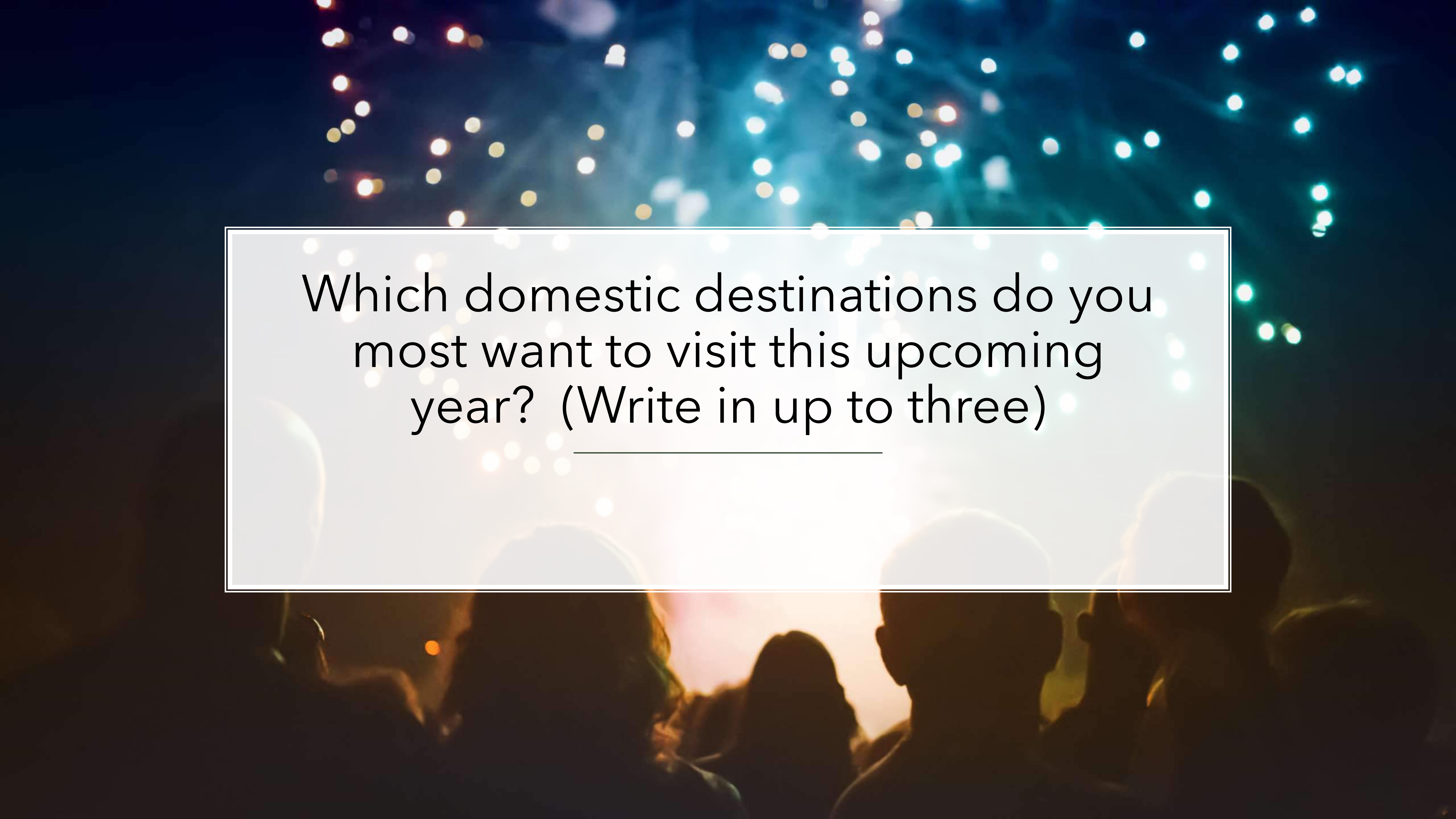


# EXPECTED NUMBER OF LEISURE TRIPS IN 2021

**Question:** IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in 2021? (Select one)

(Base: Waves 43 data. All respondents, 1,094 completed surveys. Data collected January 1-3, 2021)



The background of the slide features a dark, out-of-focus scene of a crowd at night. Numerous small, bright lights in shades of blue, white, and yellow are scattered across the upper half, creating a bokeh effect. In the lower half, the silhouettes of people's heads and shoulders are visible against a warm, orange-glowing light source, possibly a sunset or stage lighting.

Which domestic destinations do you  
most want to visit this upcoming  
year? (Write in up to three)

---





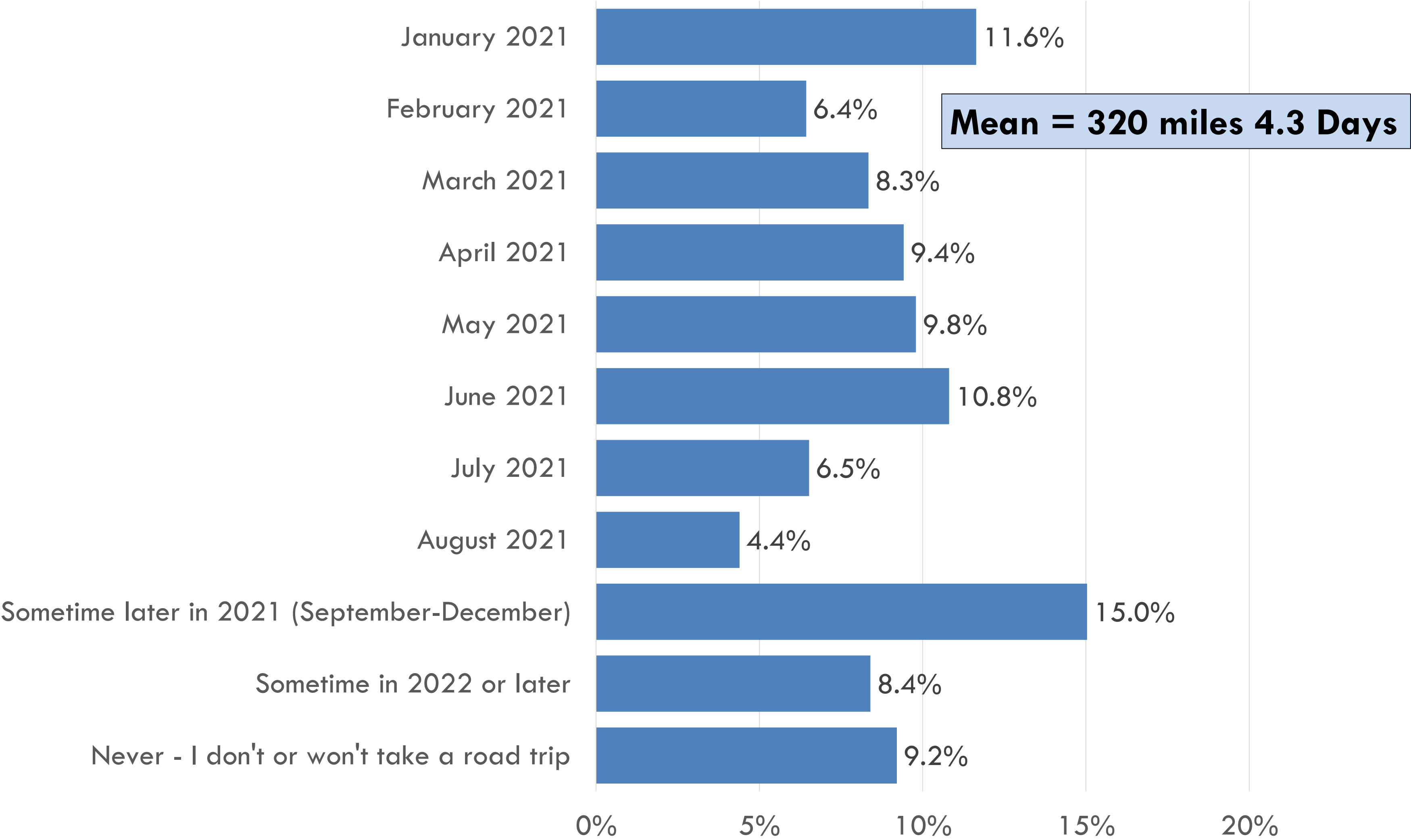
A word cloud of US destinations. The words are arranged in a horizontal, cloud-like shape. The colors range from dark blue to light blue. The words are of various sizes, with 'NEW YORK' and 'FLORIDA' being the largest. Other prominent words include 'LAS VEGAS', 'CALIFORNIA', 'SAN FRANCISCO', 'SAN DIEGO', 'WASHINGTON, D.C.', 'COLORADO', 'NEW YORK CITY', 'HAWAII', 'CHICAGO', 'MONTANA', 'ORLANDO', 'NEW ORLEANS', 'MIAMI', 'OREGON', 'ATLANTA', 'LOS ANGELES', 'TEXAS', 'DISNEY WORLD', 'MAINE', 'ARIZONA', and 'SEATTLE'.

SAN DIEGO  
WASHINGTON, D.C.  
NEW YORK  
MAINE  
ARIZONA  
SEATTLE  
SAN FRANCISCO  
COLORADO  
CALIFORNIA  
NEW YORK CITY  
HAWAII  
CHICAGO  
MONTANA  
FLORIDA  
TEXAS  
ORLANDO  
MIAMI  
OREGON  
ATLANTA  
LAS VEGAS  
NEW ORLEANS  
LOS ANGELES  
DISNEY WORLD

# MONTH OF NEXT ROAD TRIP

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

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

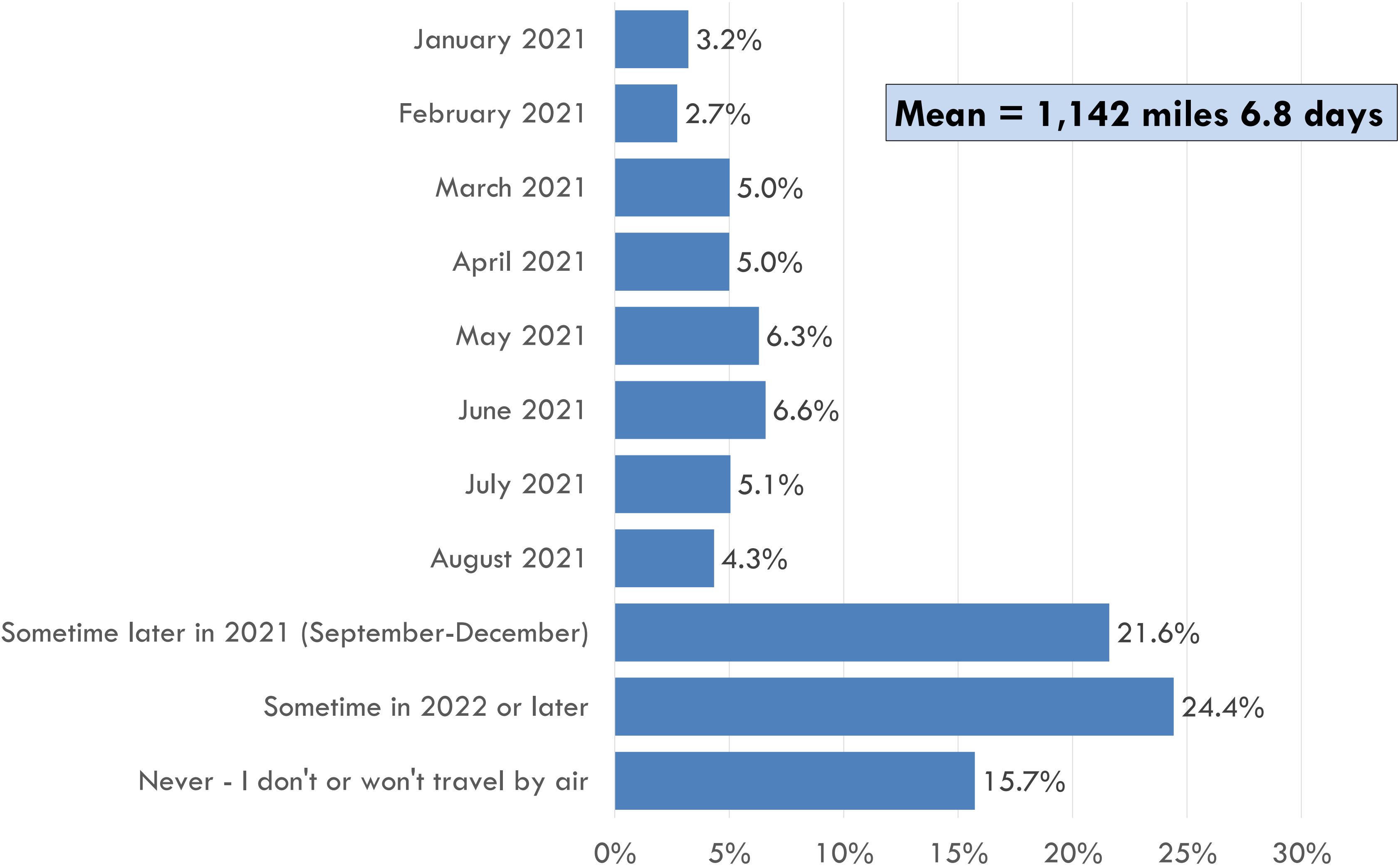




# MONTH OF NEXT COMMERCIAL AIRLINE FLIGHT

**Question:** In what month do you expect you will take your NEXT TRIP ON A COMMERCIAL AIRLINE?

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



# 2020

# 2021

## The Next 3 Months

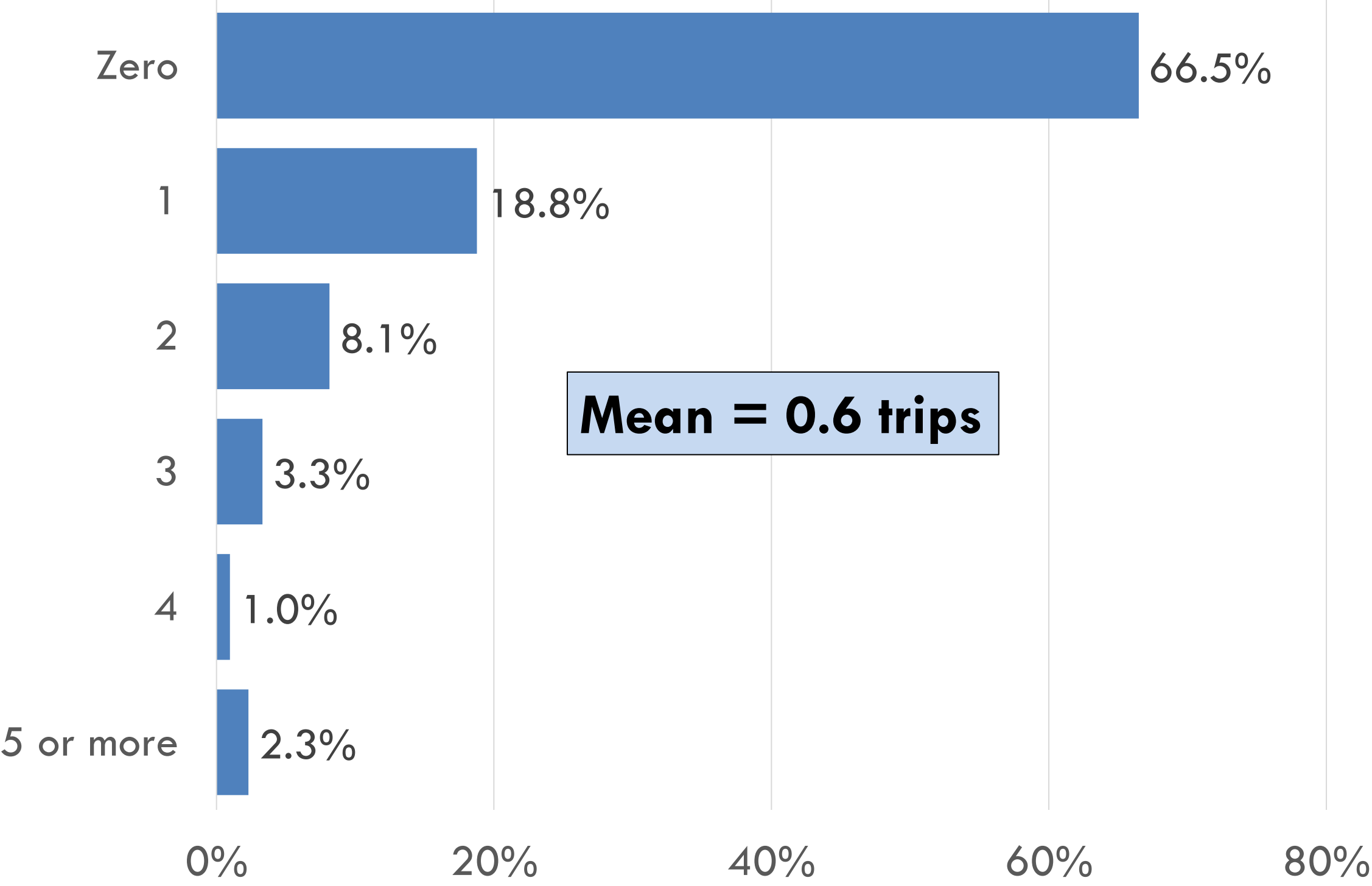
JANUARY	FEBRUARY	MARCH
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
APRIL	MAY	JUNE
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JULY	AUGUST	SEPTEMBER
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
OCTOBER	NOVEMBER	DECEMBER
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

JANUARY	FEBRUARY	MARCH
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
APRIL	MAY	JUNE
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JULY	AUGUST	SEPTEMBER
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OCTOBER	NOVEMBER	DECEMBER
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31



# LEISURE TRIPS

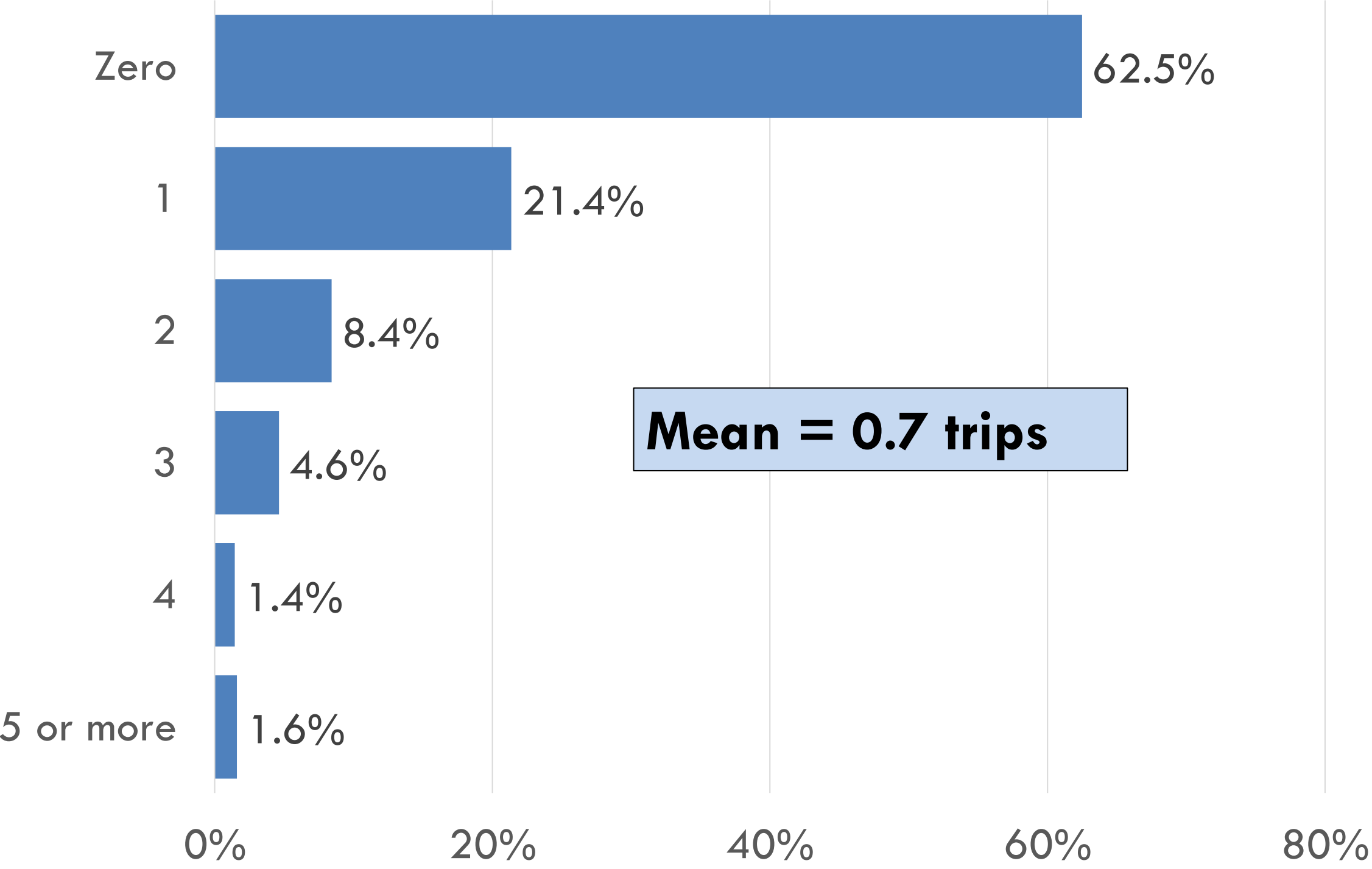
PAST 3 MONTHS



**Question:** In the MOST RECENT THREE (3) MONTHS, how many total leisure trips did you take? (Select one to fill in the blank)

I took \_\_\_\_\_ leisure trips

NEXT 3 MONTHS

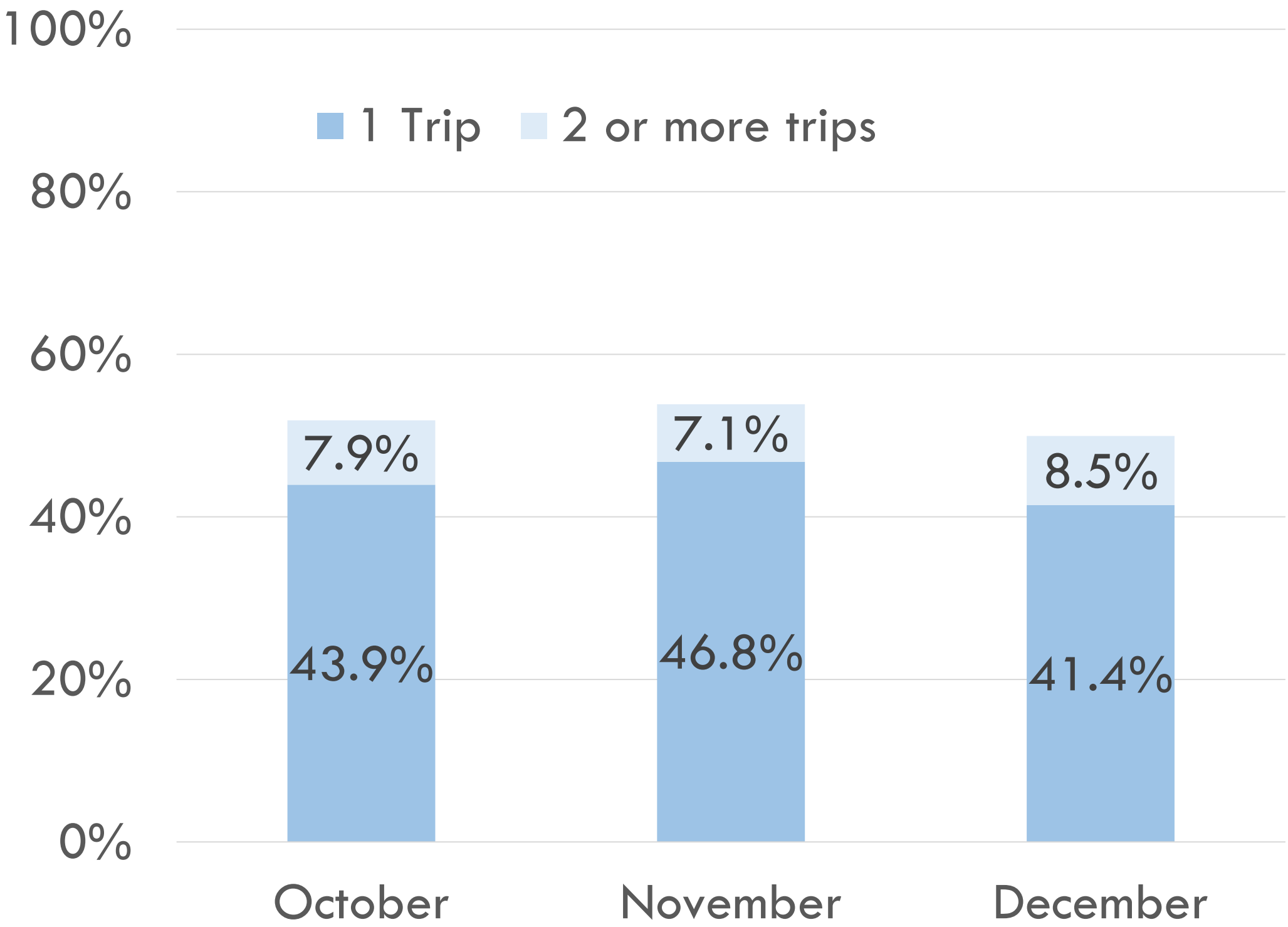


**Question:** HOW MANY LEISURE TRIPS do you expect to take (even if tentatively) during the first three months of the year?

I expect to take \_\_\_\_\_ leisure trips

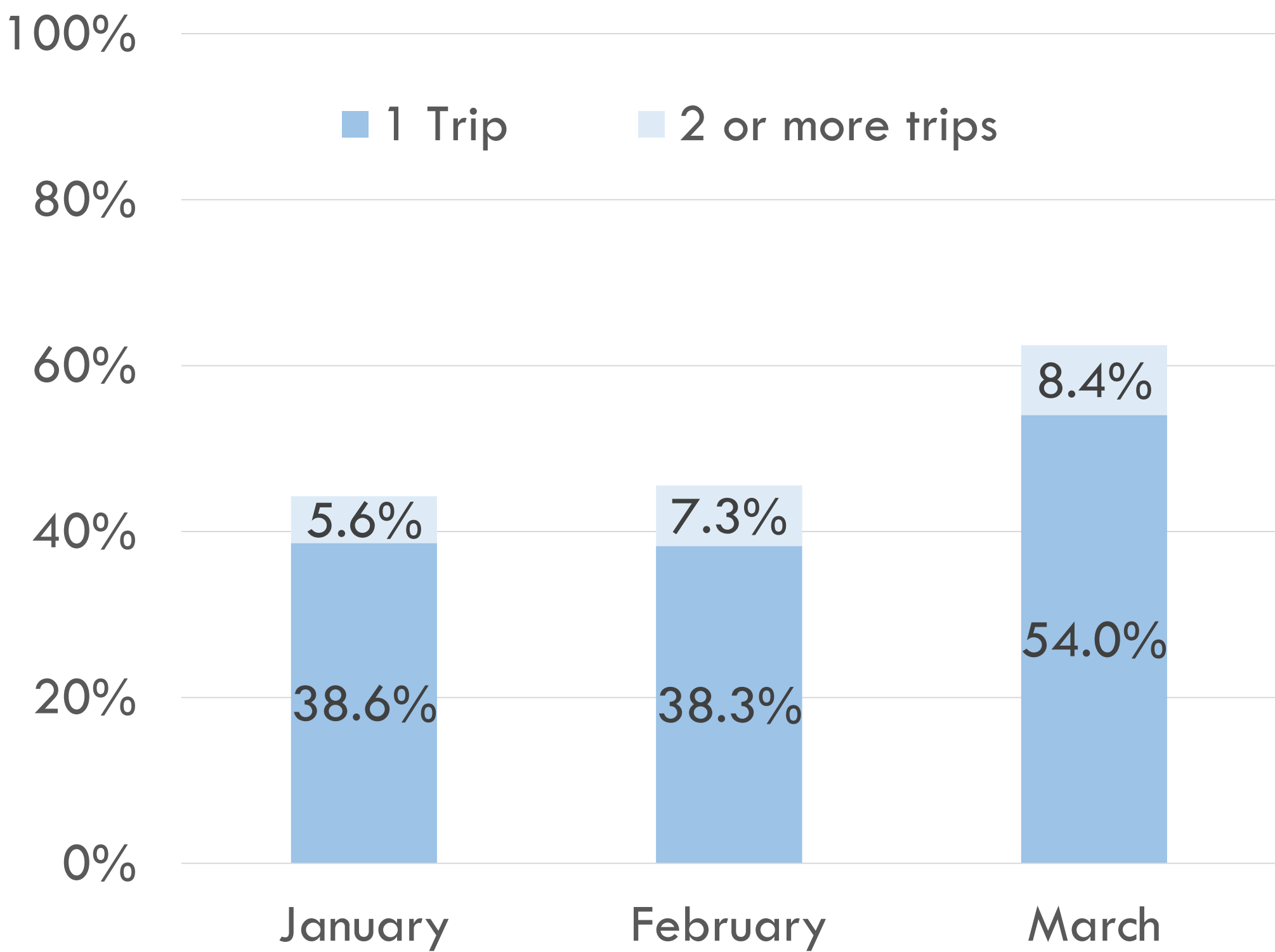
# AMERICANS WHO DID/WILL TRAVEL: TRIPS TAKEN BY MONTH

PAST 3 MONTHS



**Question:** How many leisure trips did you take in each of these MOST RECENT THREE MONTHS? (Select the number of trips you took in each month)

NEXT 3 MONTHS

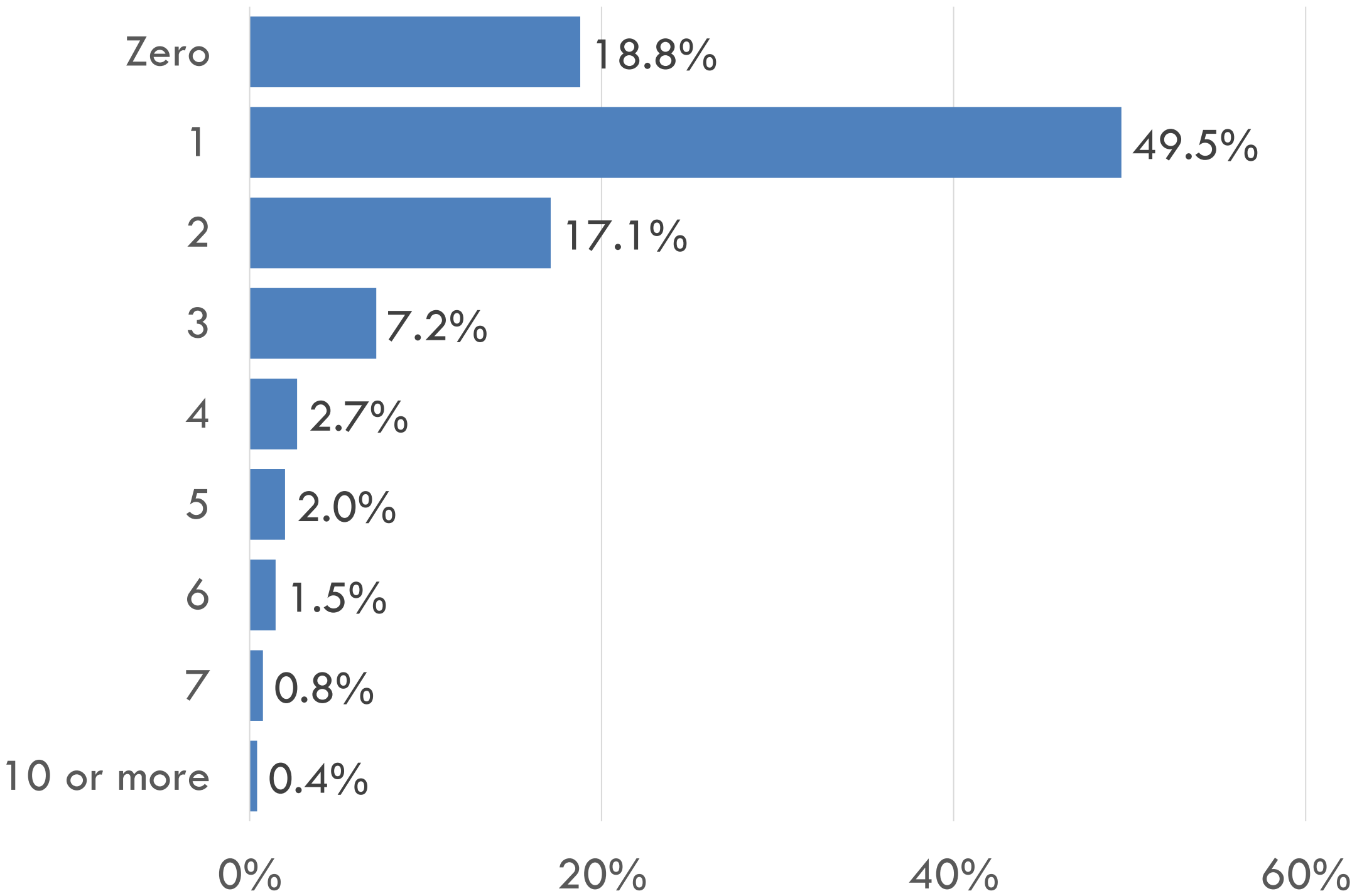


**Question:** How many leisure trips do you expect to take (even if tentatively) in each of these months?



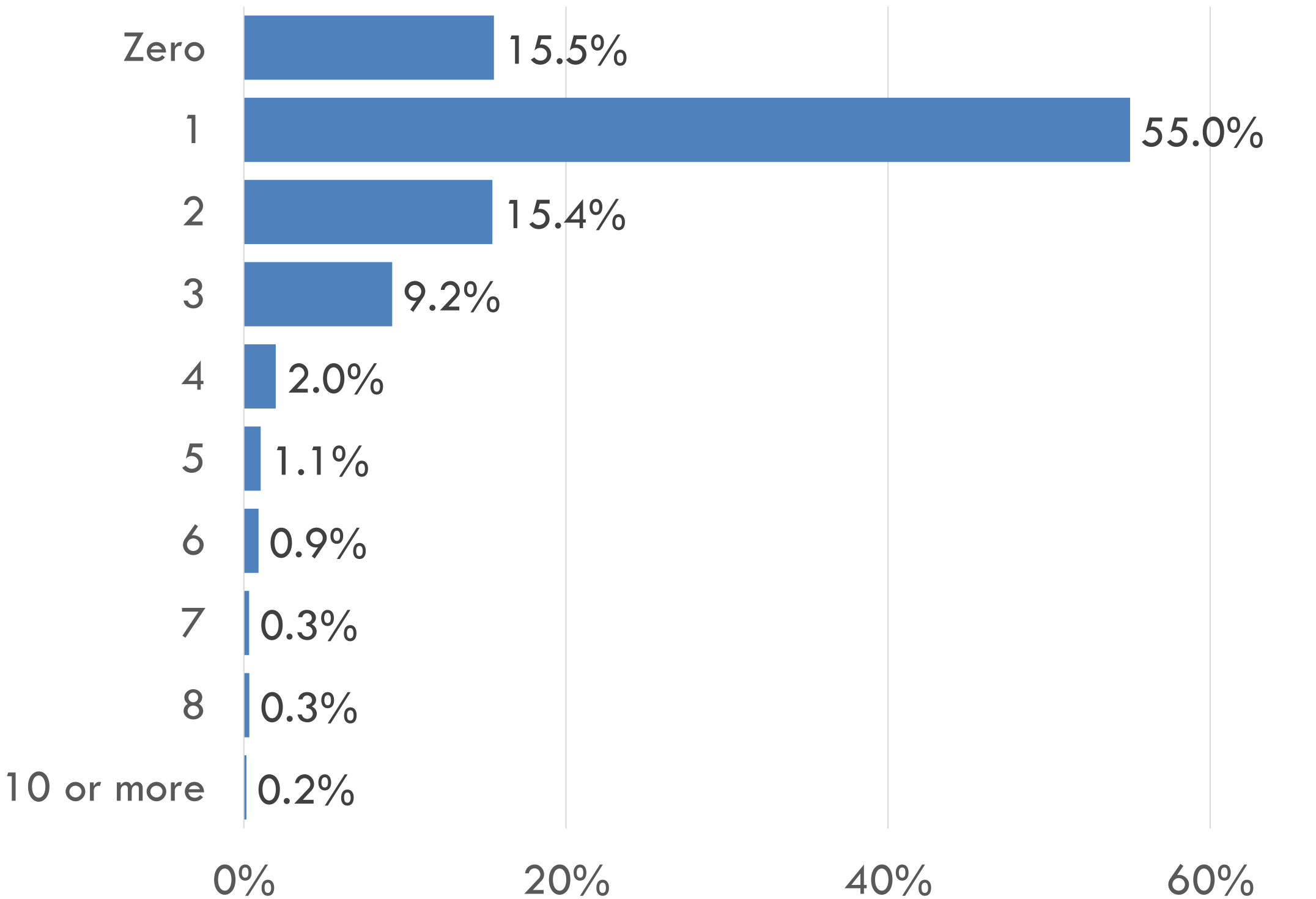
# AMERICANS WHO DID/WILL TRAVEL: OVERNIGHT LEISURE TRIPS

PAST 3 MONTHS



**Question:** How many of these leisure trips were OVERNIGHT TRIPS (i.e., trips including at least one night away from your home)?

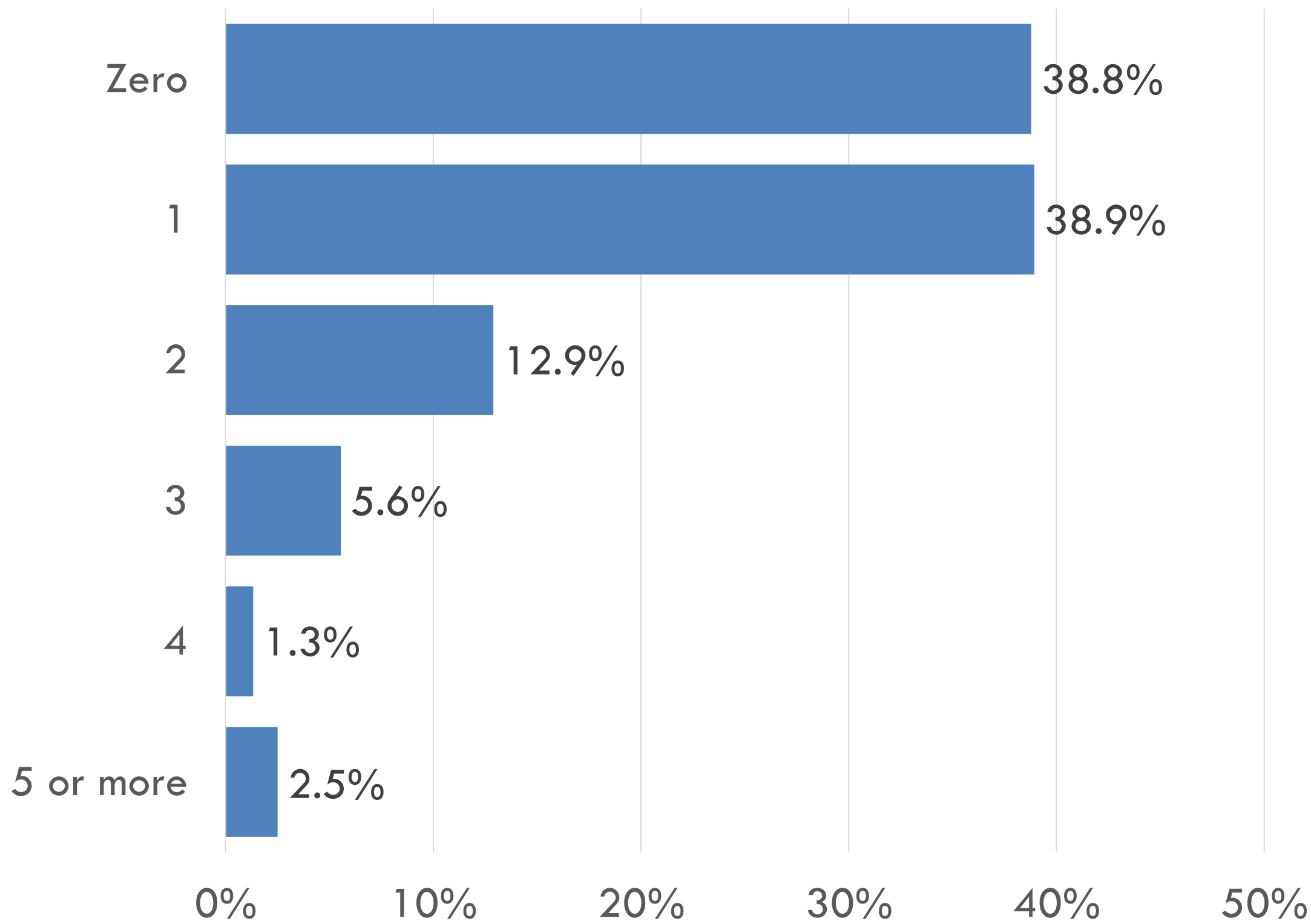
NEXT 3 MONTHS



**Question:** How many of these leisure trips will be OVERNIGHT TRIPS (i.e., trips including at least one night away from your home)?

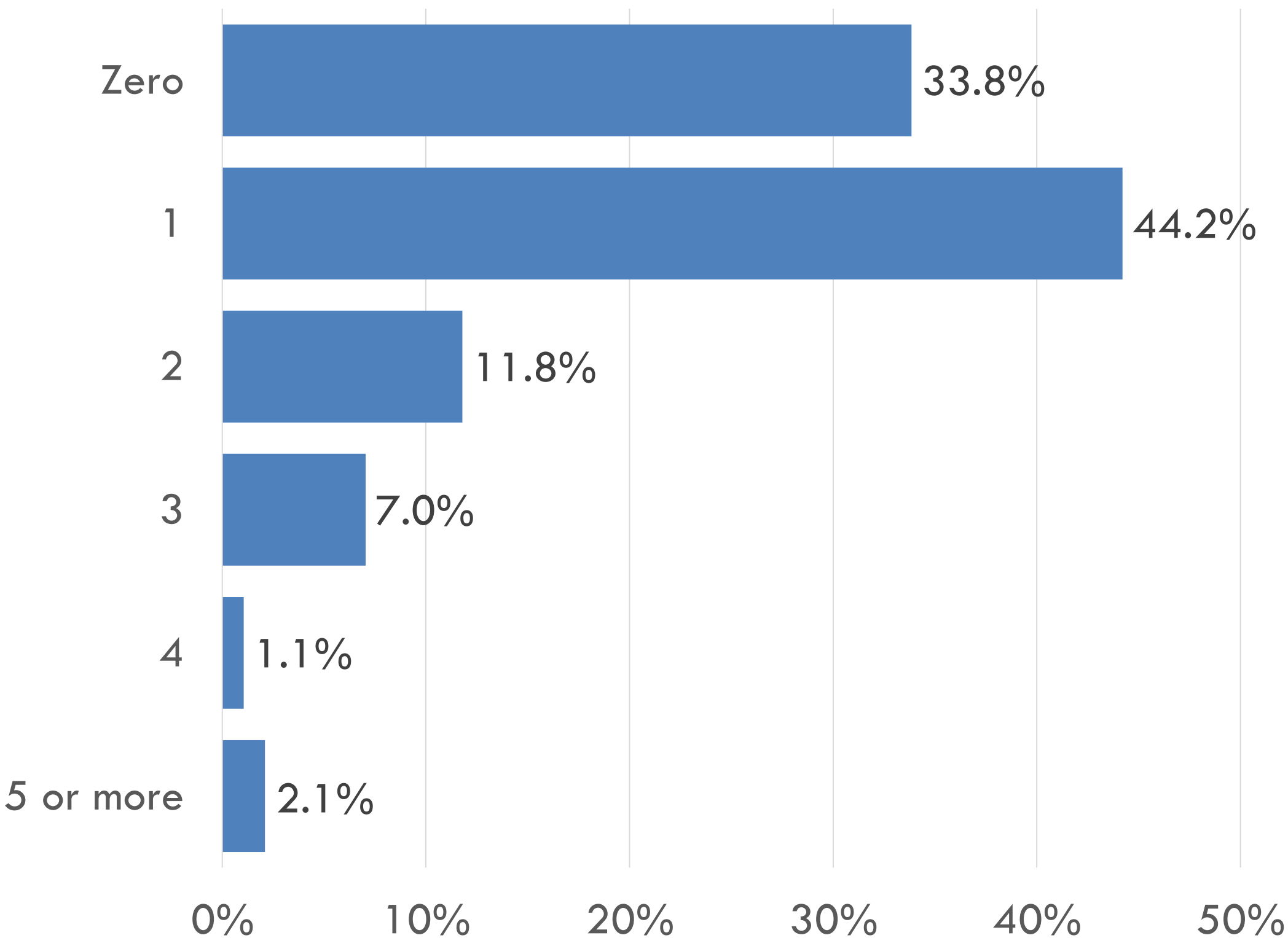
# AMERICANS WHO DID/WILL TRAVEL: REGIONAL TRIPS

PAST 3 MONTHS



**Question:** How many of these leisure trips were REGIONAL TRIPS (travel less than 250 miles from home) away from home?

NEXT 3 MONTHS

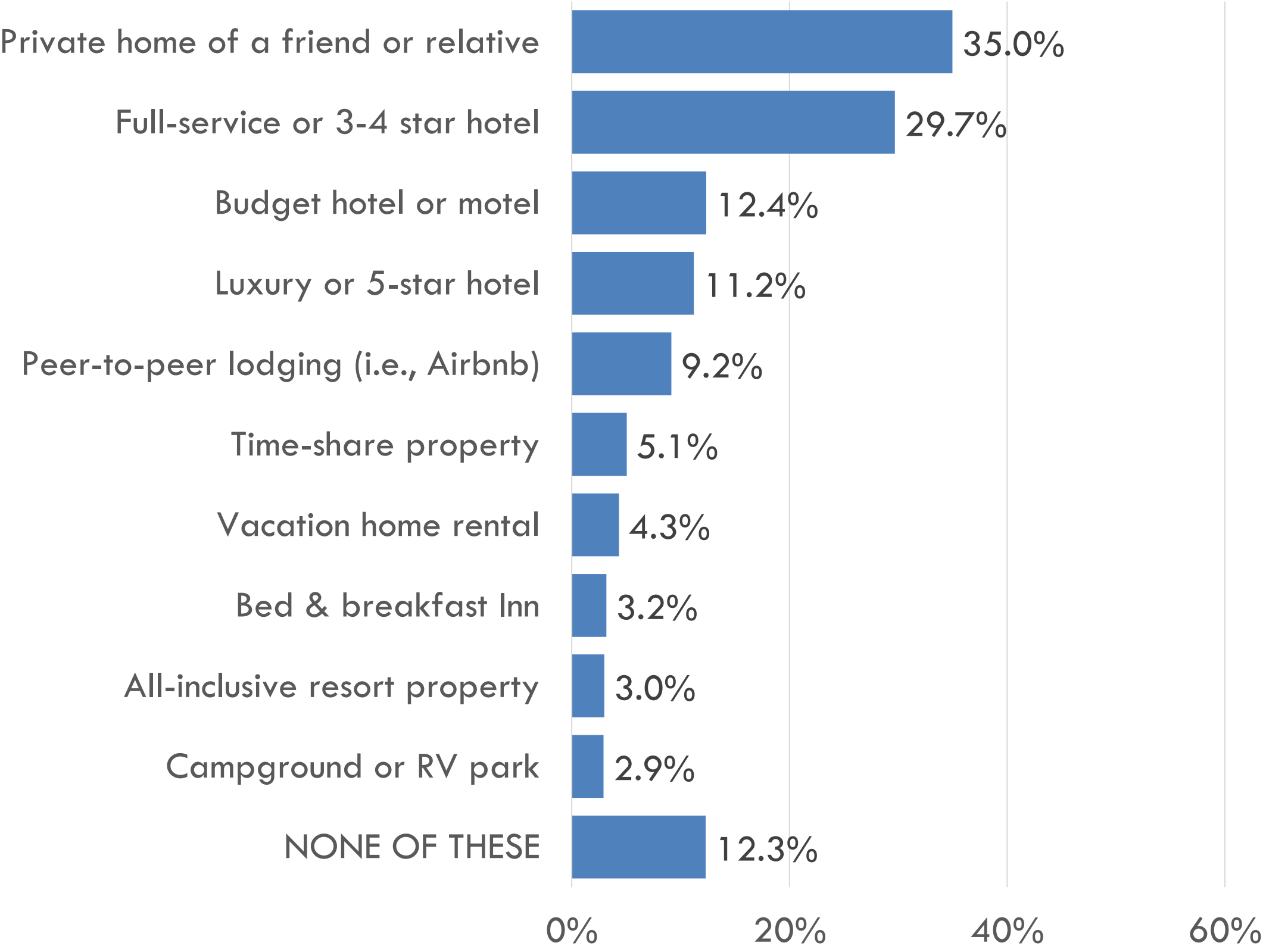


**Question:** How many of these leisure trips will be REGIONAL TRIPS (travel less than 250 miles from your home)?



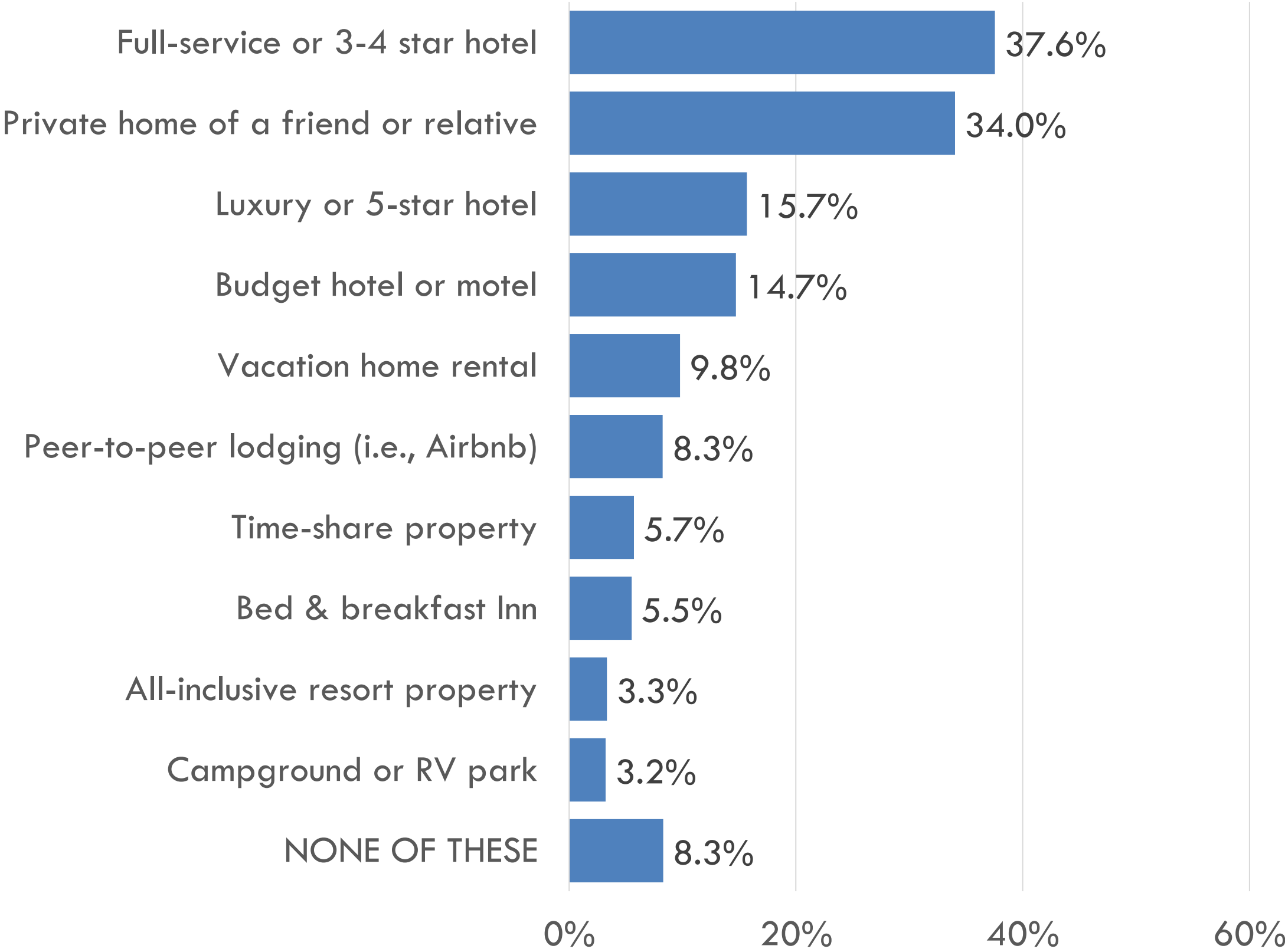
# EXPECTED PLACE OF STAY

## PAST 3 MONTHS



**Question:** On these leisure trips, in which of the following did you stay overnight?

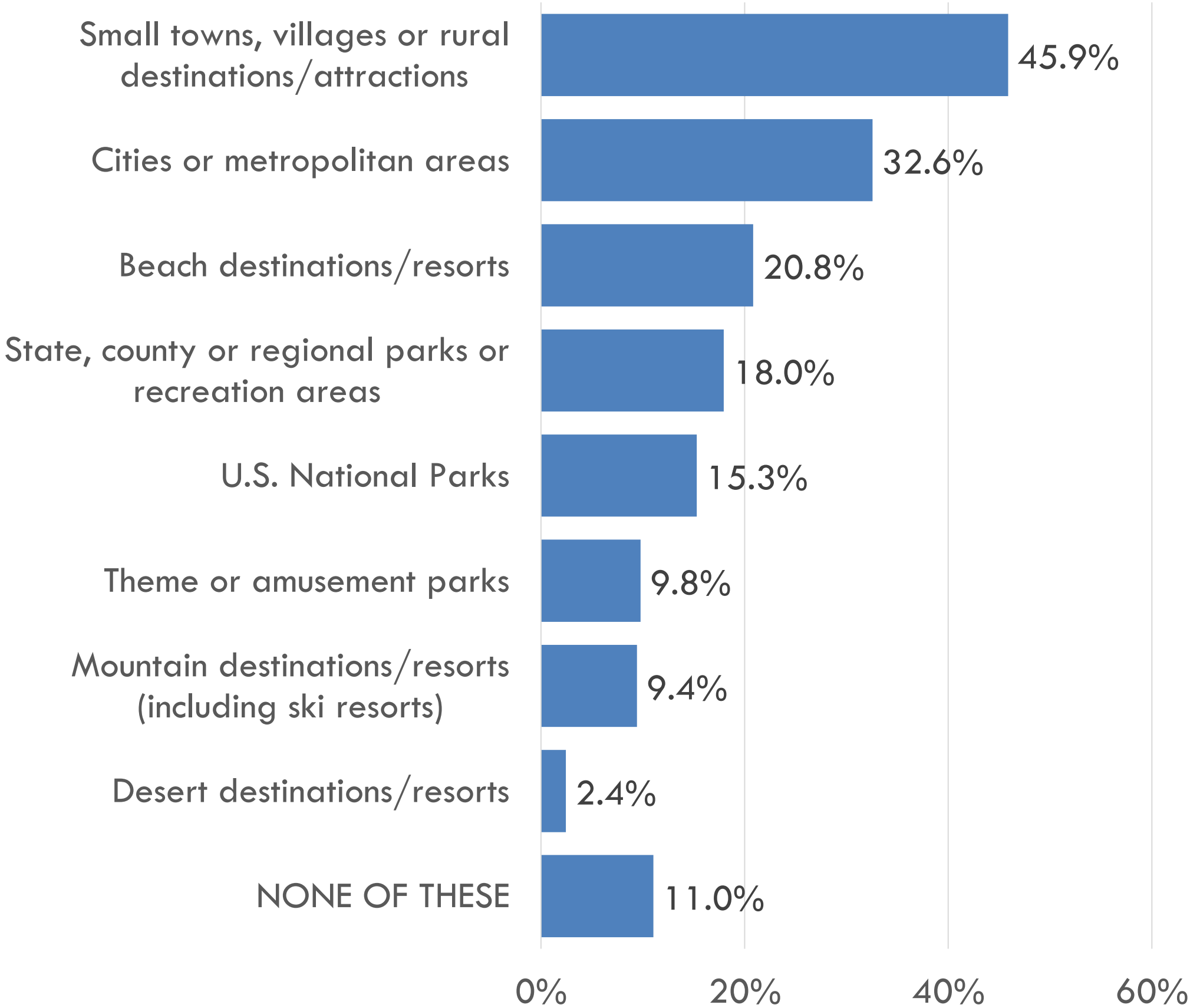
## NEXT 3 MONTHS



**Question:** On these leisure trips, in which of the following are you expecting to stay overnight?

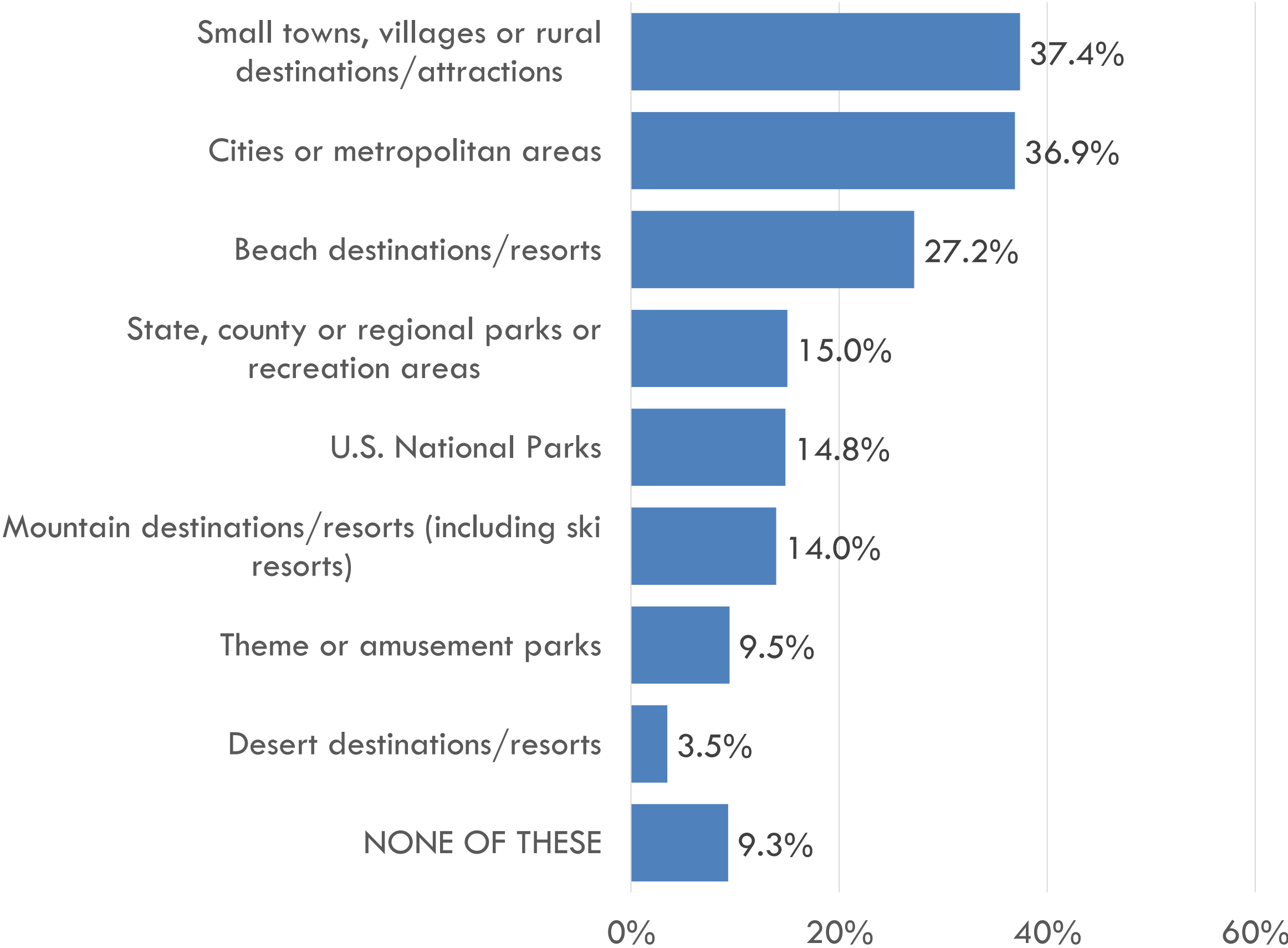
# DESTINATION TYPES EXPECTED (NEXT THREE MONTHS)

PAST 3 MONTHS



**Question:** On these leisure trips, which of the following did you visit?

NEXT 3 MONTHS

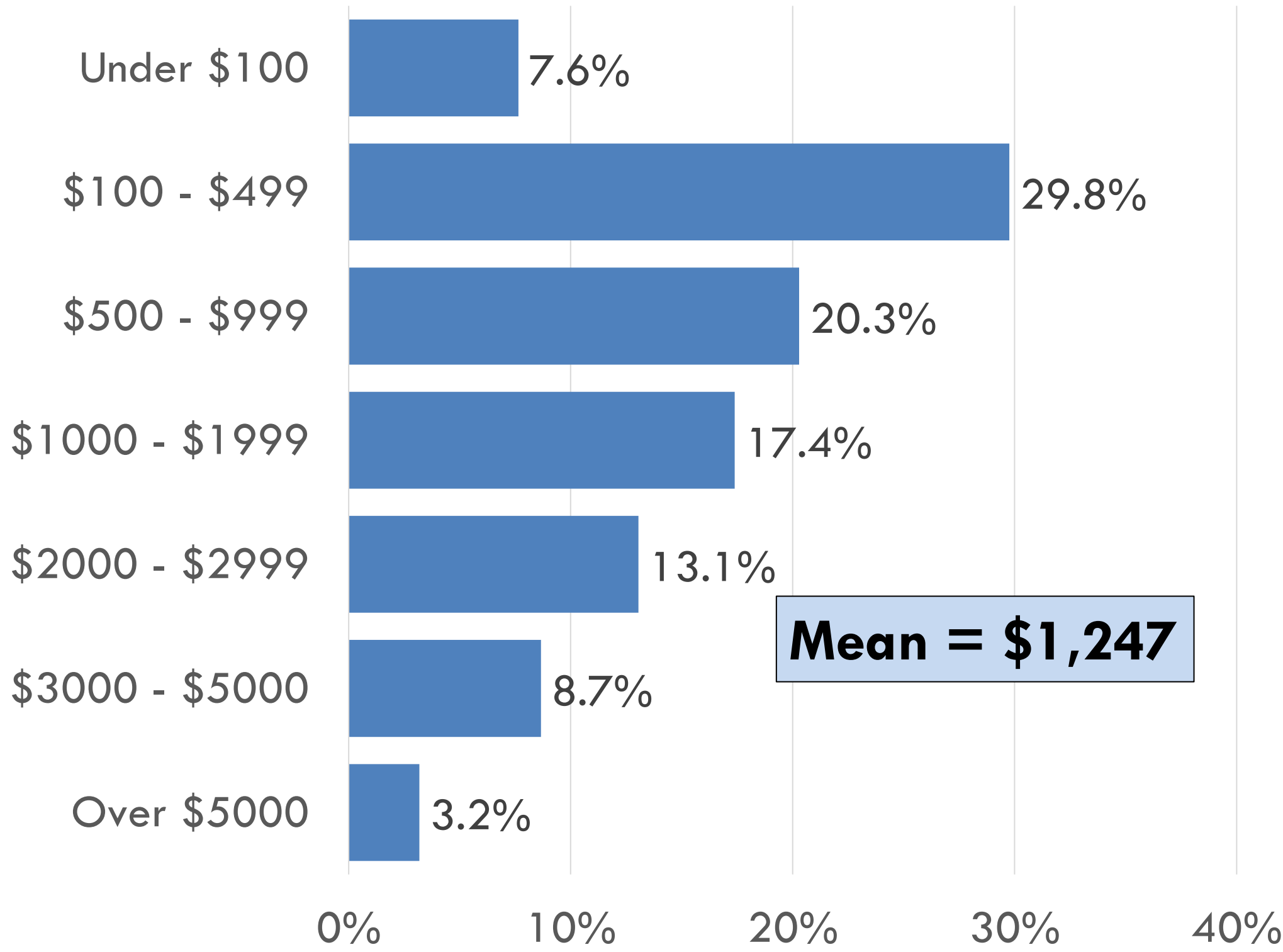


**Question:** On these leisure trips, which of the following are you expecting to visit?



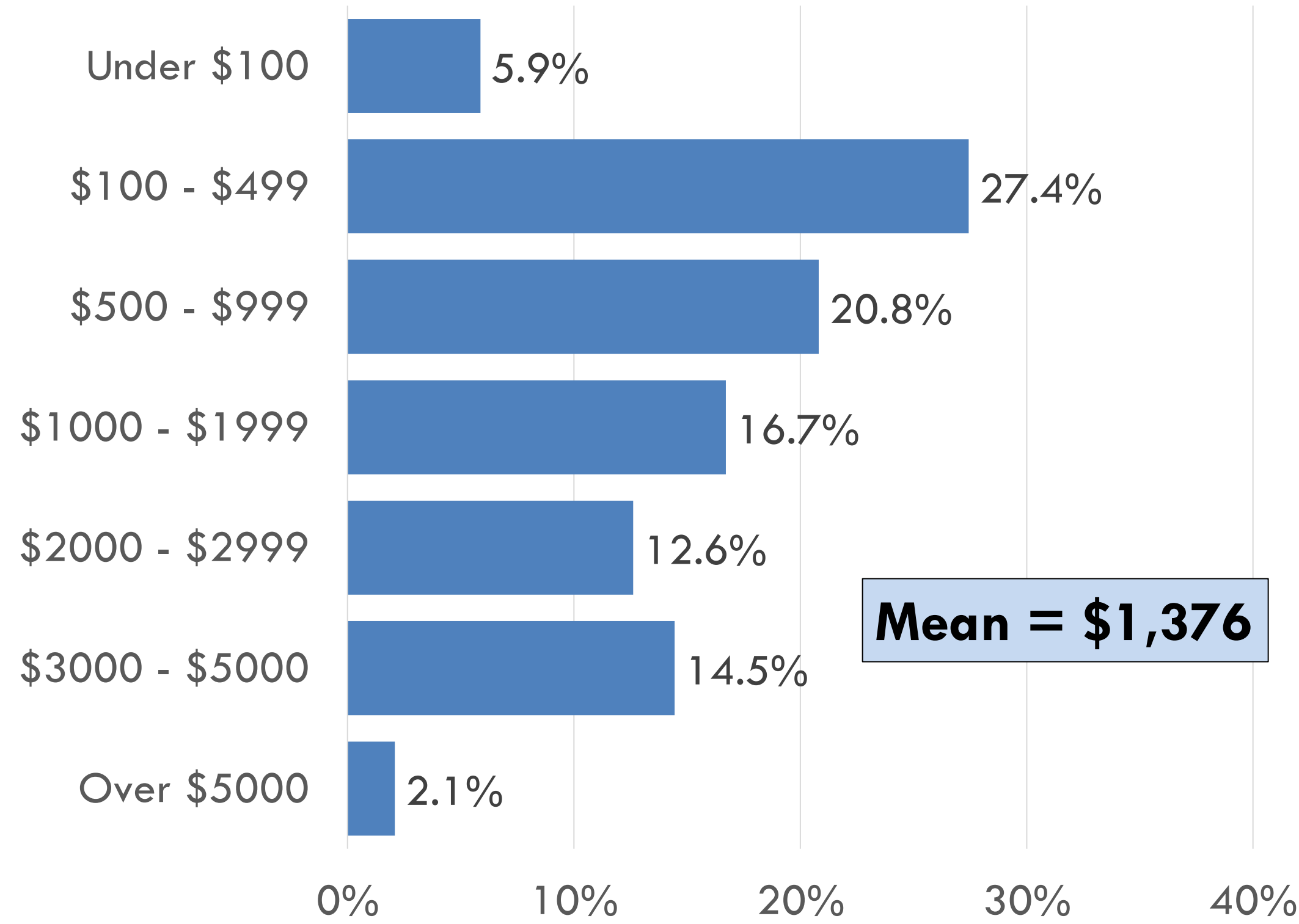
# LEISURE TRAVEL SPENDING

PAST 3 MONTHS



**Question:** How much IN TOTAL did you spend on the leisure trips you took in the most recent three-month period (October 1 to December 31)?

NEXT 3 MONTHS



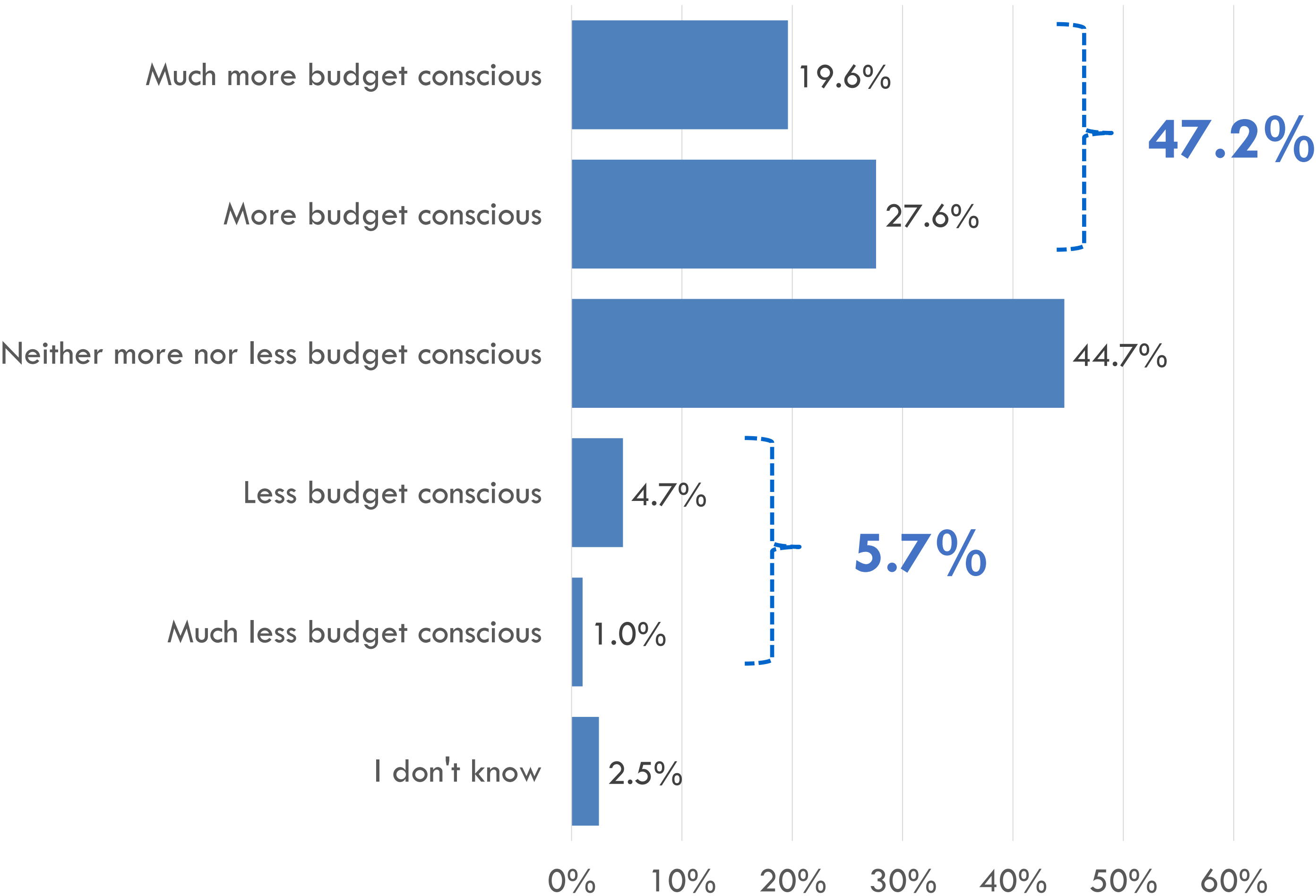
**Question:** How much IN TOTAL do you expect to spend on the leisure trips you will take in the next three-month period (January to March)?

# BUDGET CONSCIOUSNESS AROUND TRAVEL (NEXT 3 MONTHS)

**Question:** Compared to most recent three months, how budget conscious will you be while traveling in the NEXT THREE MONTHS?

I will be \_\_\_\_\_ while traveling.

(Base: Waves 43 data. Respondents expecting to travel in the next three months, 436 completed surveys. Data collected January 1-3, 2021)



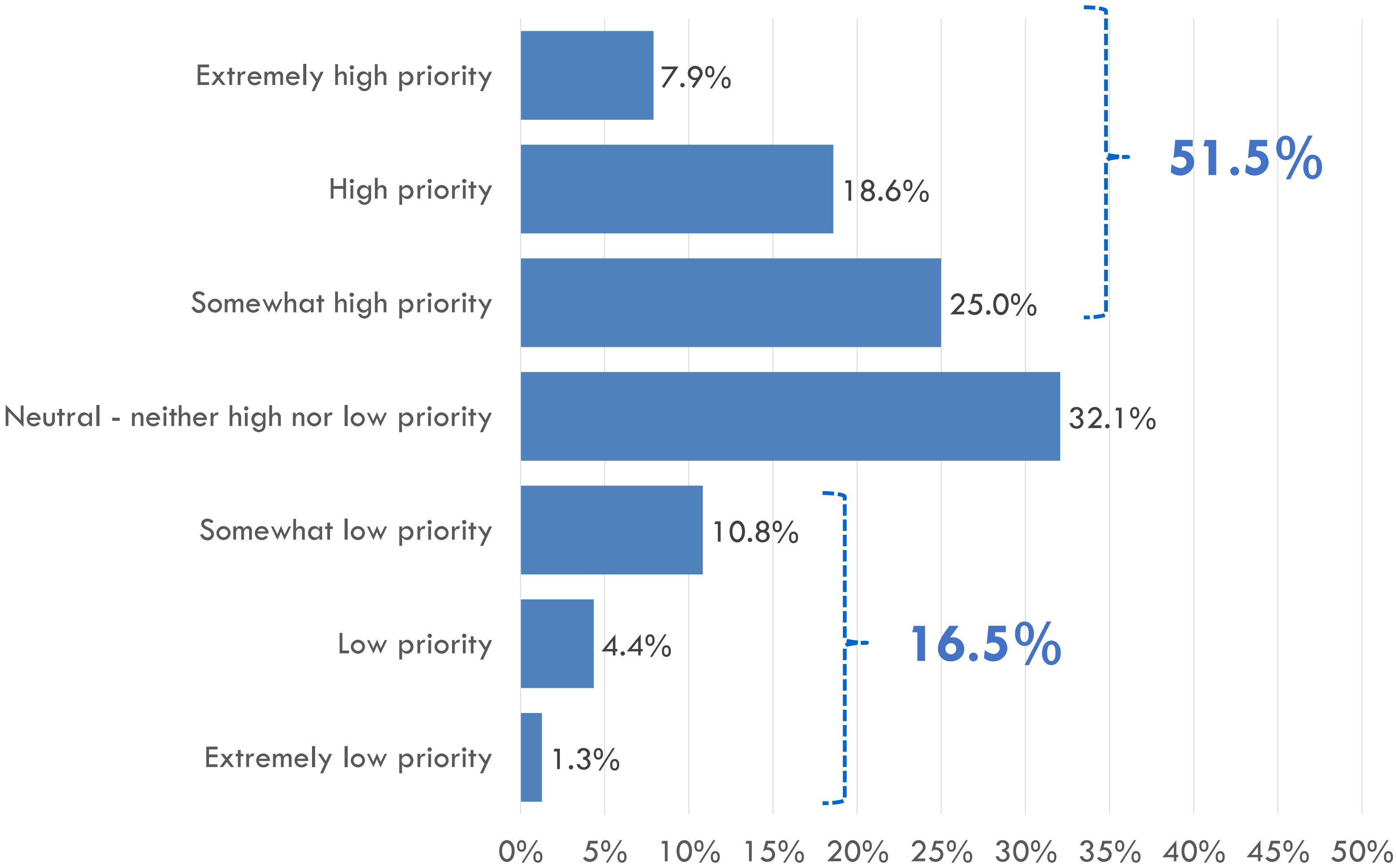


# LEISURE TRAVEL AS A BUDGET PRIORITY (NEXT 3 MONTHS)

**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a

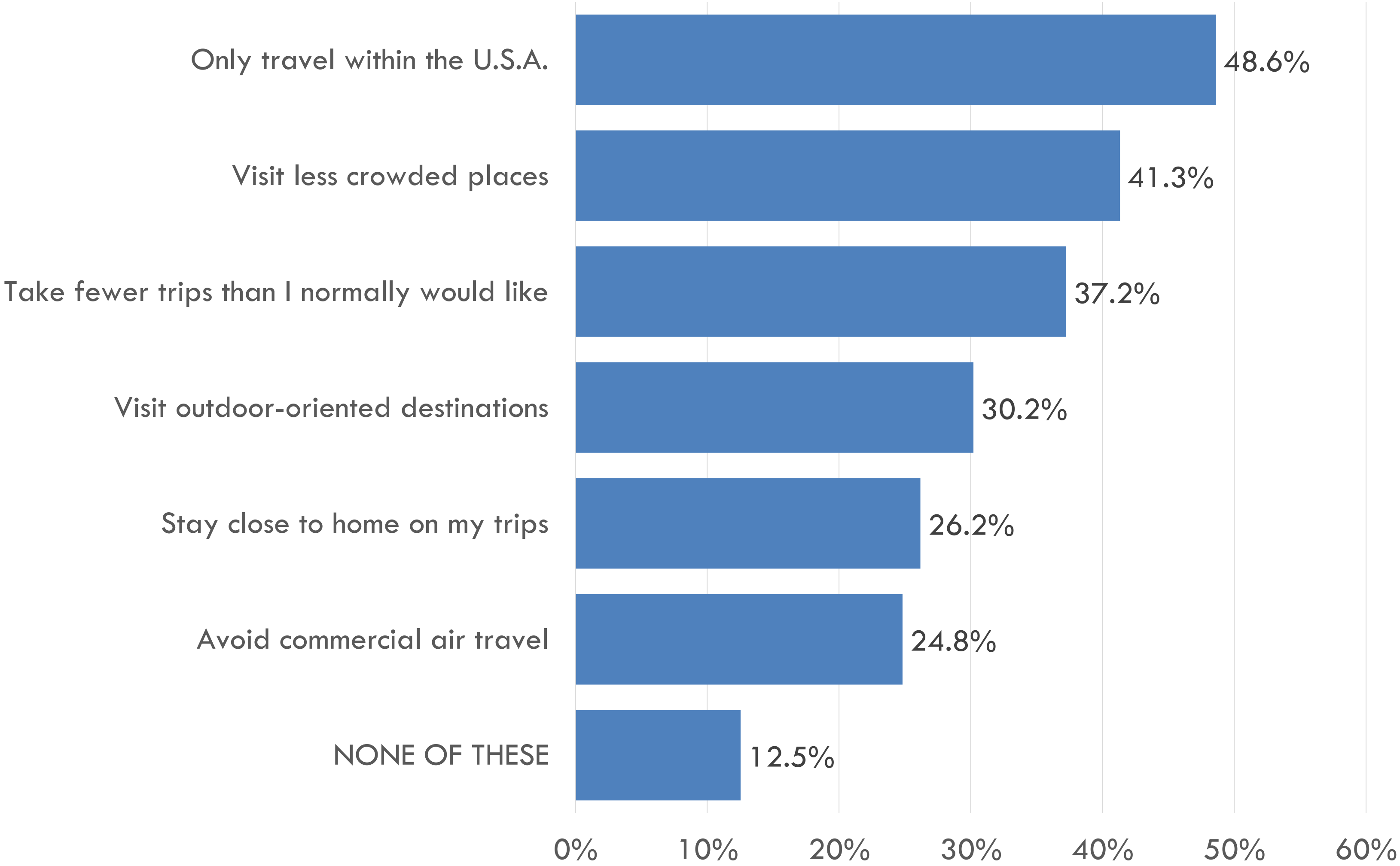
(Base: Waves 43 data. Respondents expecting to travel in the next three months, 436 completed surveys. Data collected January 1-3, 2021)



# EXPECTATIONS FOR ADAPTING TO THE PANDEMIC (NEXT 3 MONTHS)

**Question:** In the NEXT THREE MONTHS, which of these actions do you expect to take as a result of the ongoing COVID-19 pandemic? (Select all that apply)

(Base: Waves 43 data. Respondents expecting to travel in the next three months, 436 completed surveys. Data collected January 1-3, 2021)





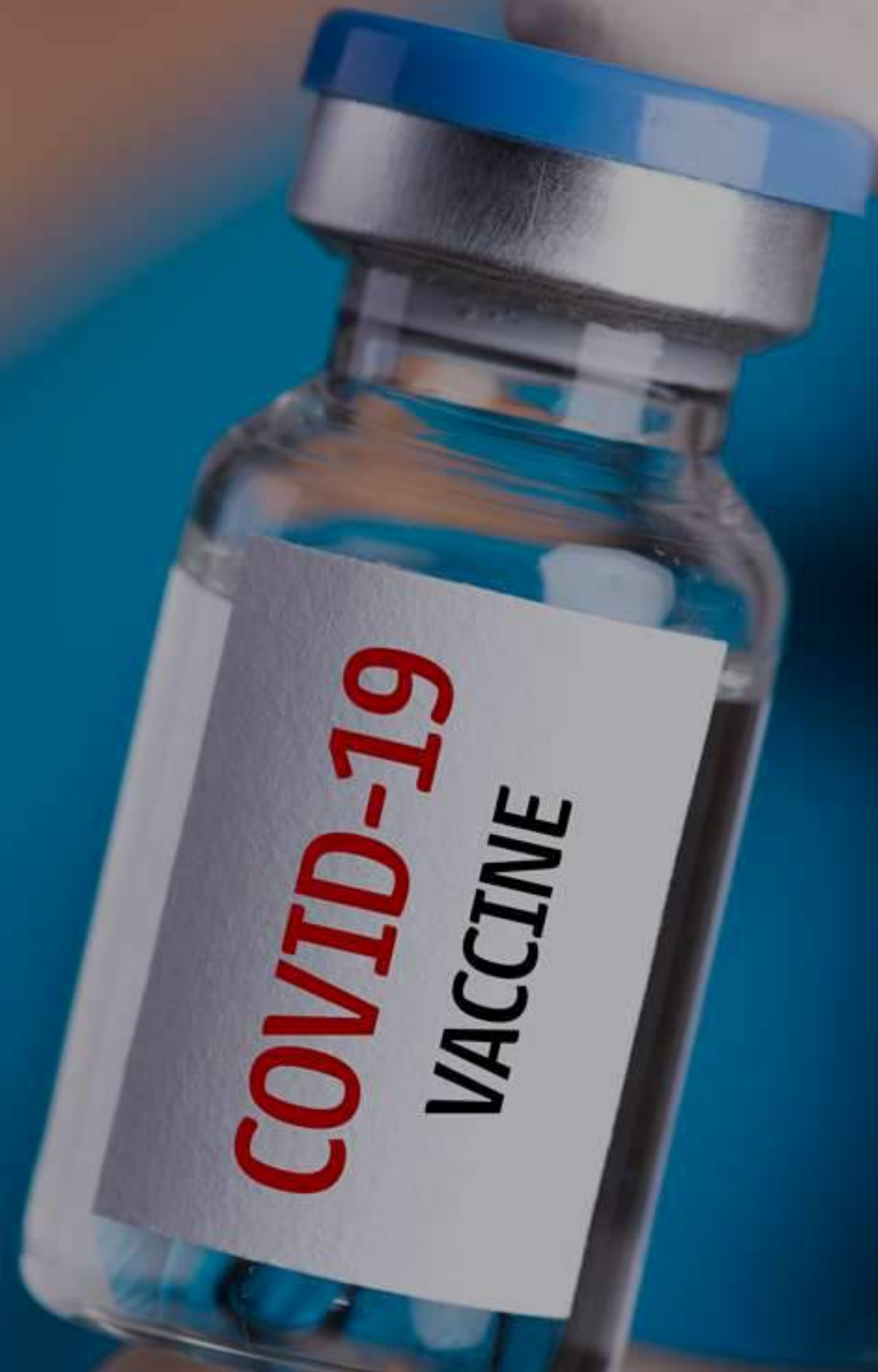
# Key Takeaways

- Travel will be greater in 2021 than 2020, but may be ~39% off 2019 levels
- Large proportions of those travelers most excited for travel in 2021 are already online researching travel and planning post-vaccine-widely-distributed trips
- The majority of American travelers do not plan to leisure travel in Q1, but 37.5% do. This travel is likelier to occur in March than in January and February
- The pandemic hangover will continue in the next 3 months, with greater budget consciousness, and targeting less crowded and outdoor-oriented destinations





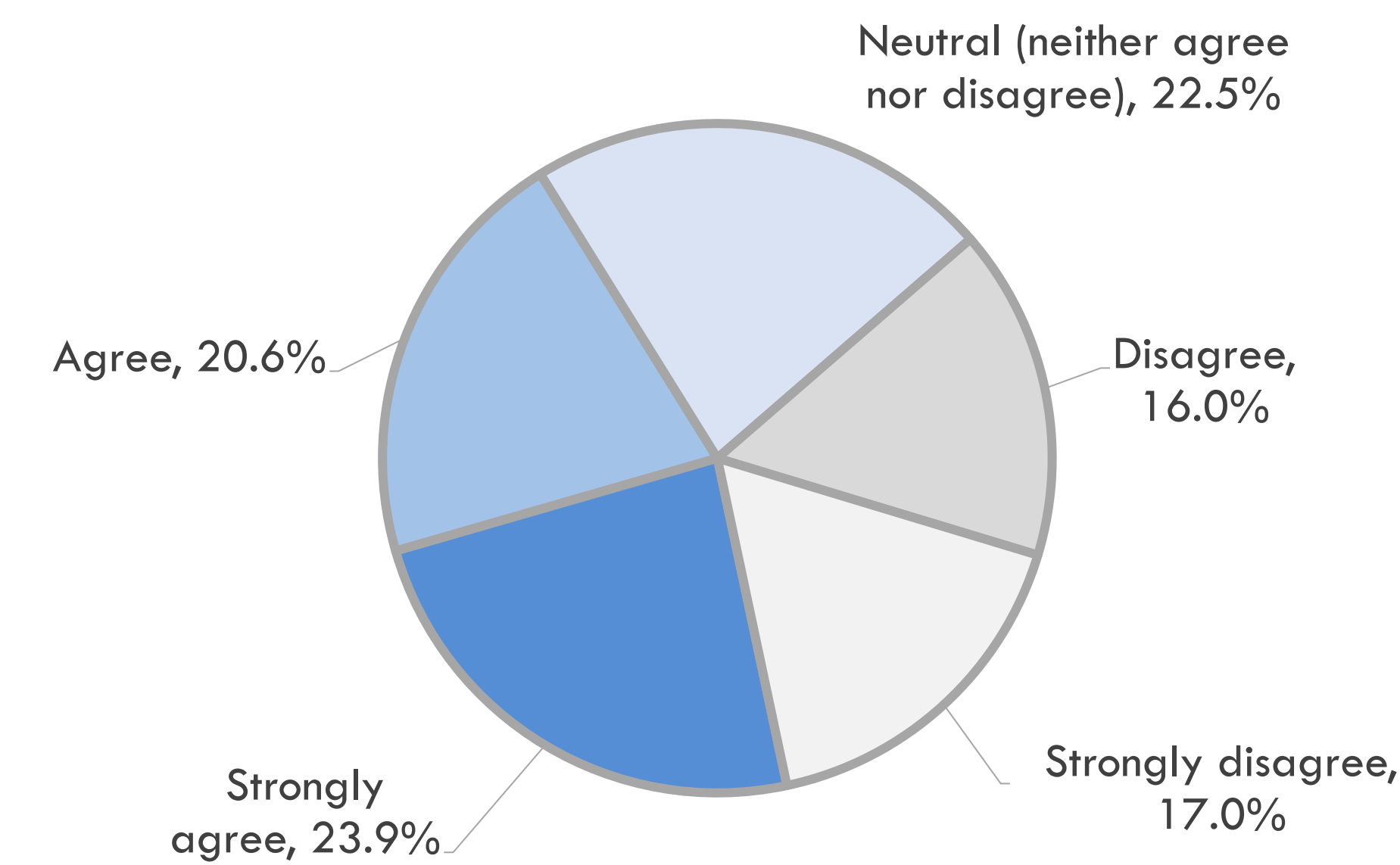
# FEELINGS ABOUT A COVID-19 VACCINE





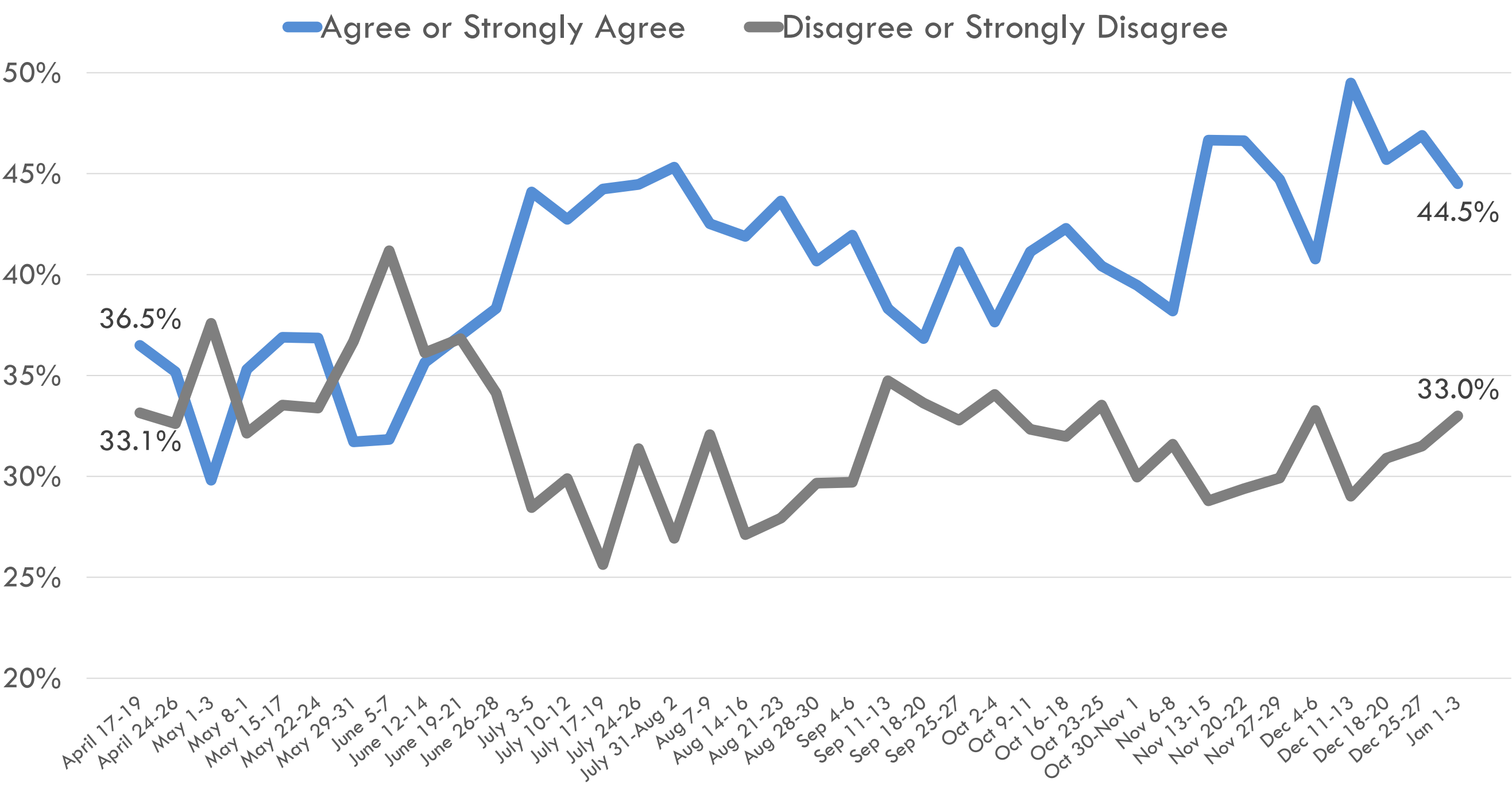
# TRAVEL UNTIL GETTING THE VACCINE

How much do you agree with the following statement?  
**Statement:** I'm not traveling until I am able to get a vaccine.



(Base: Waves 6-43. 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, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

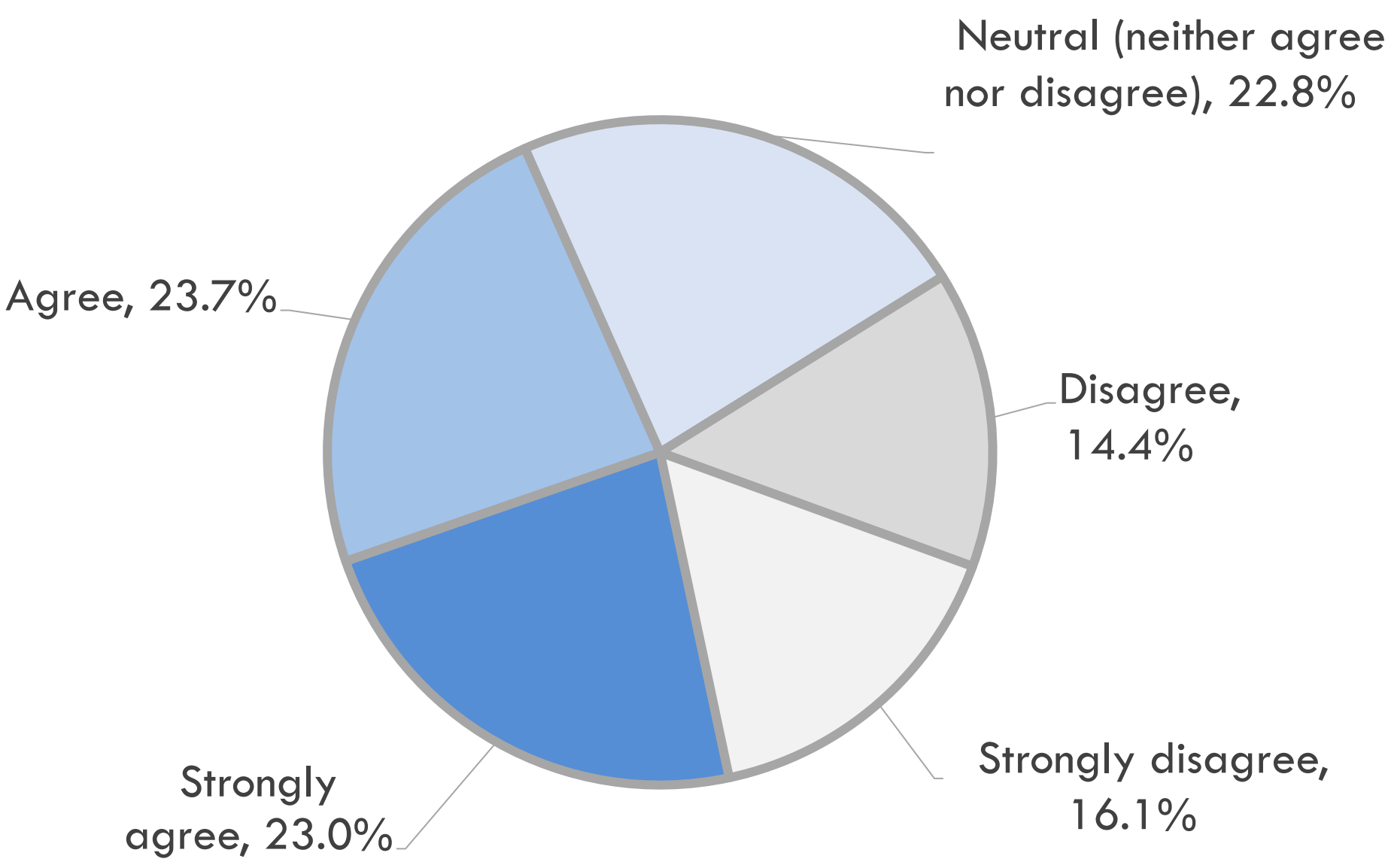
## Historical data



# TRAVEL UNTIL VACCINES ARE MADE WIDELY AVAILABLE

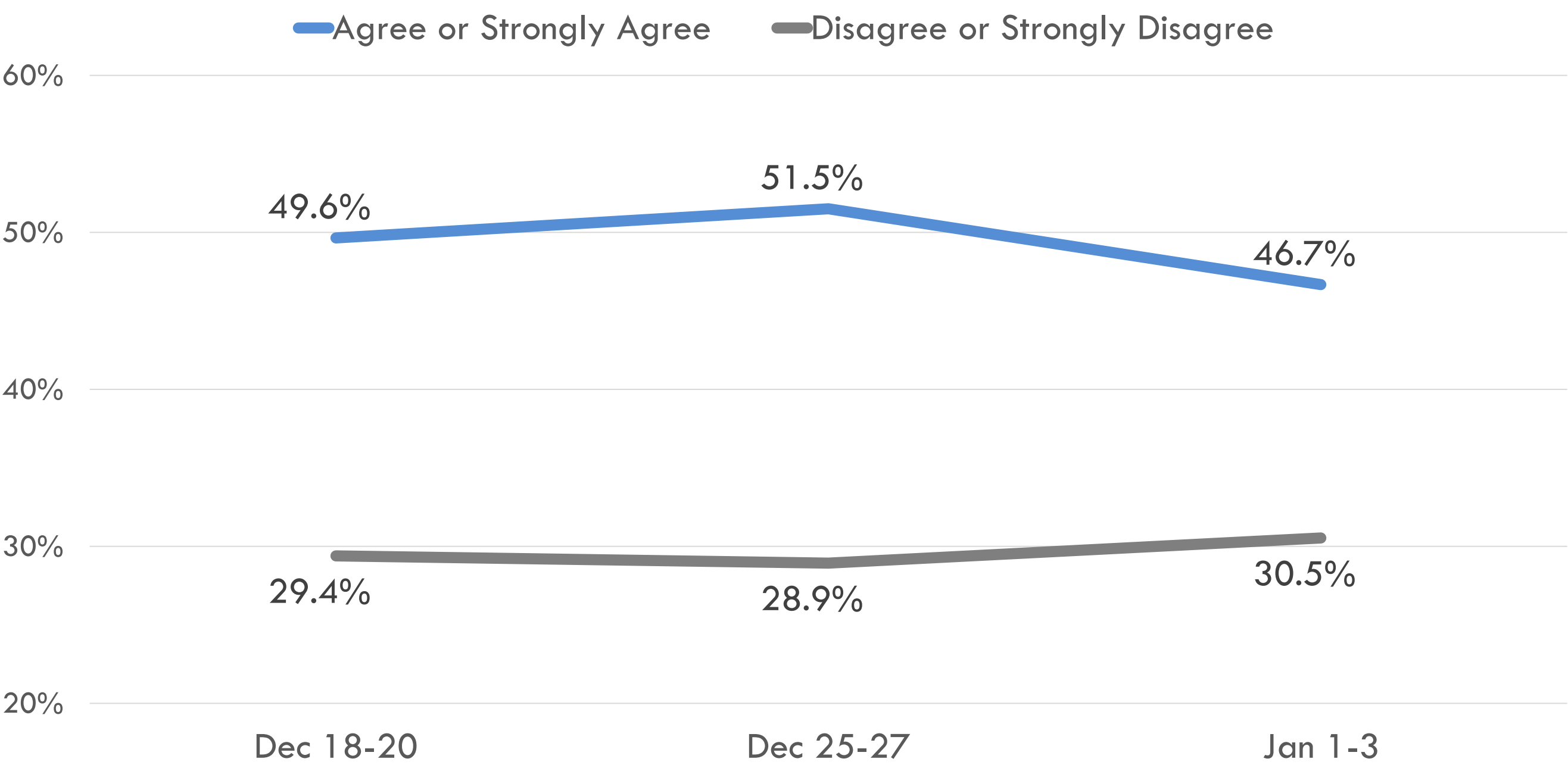
How much do you agree with the following statement?

**Statement:** I'm not traveling until vaccines are made widely available.



(Base: Waves 41-43. All respondents, 1,201, 1,207 and 1,206 completed surveys.)

## Historical data

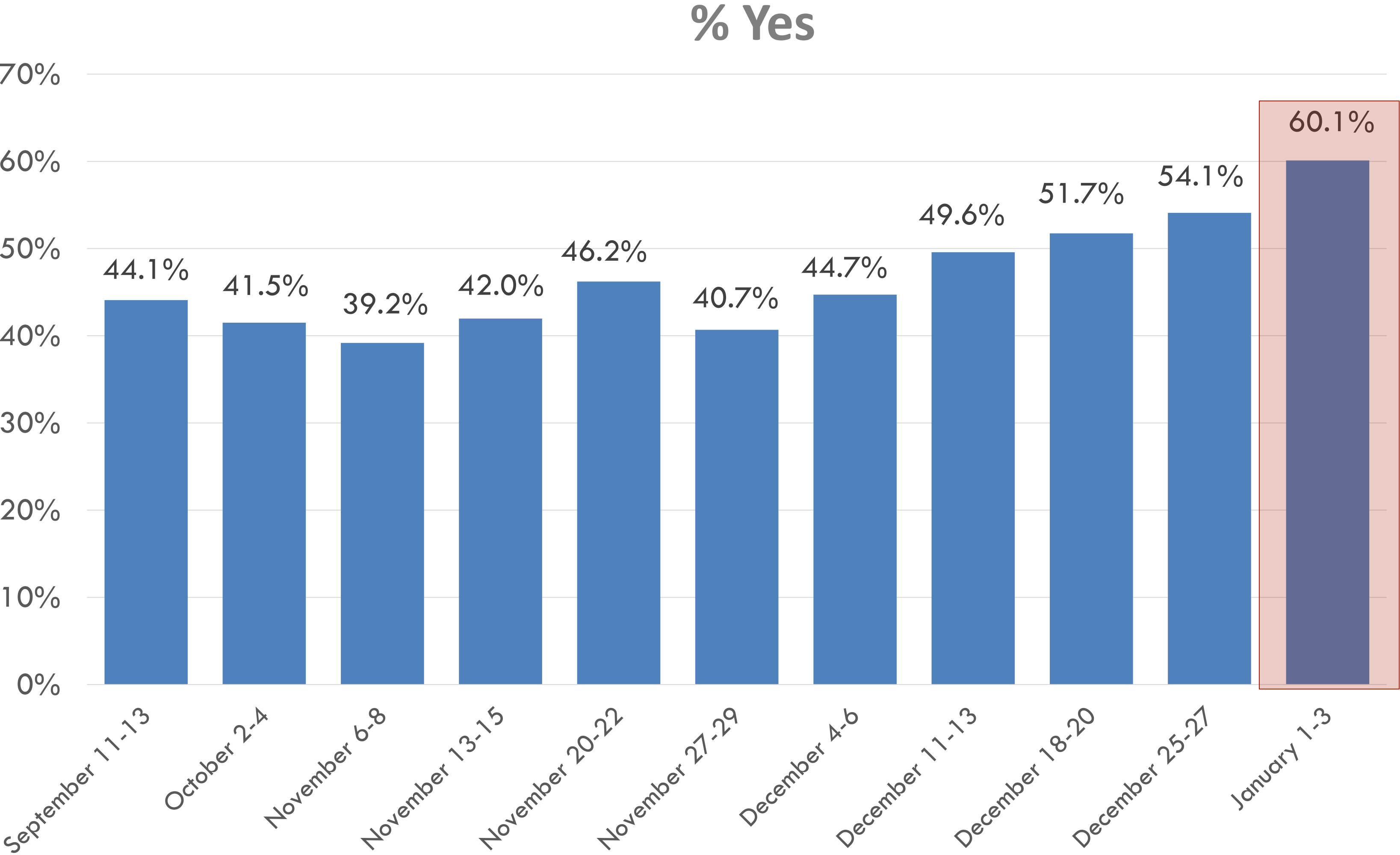




# EXPECTATIONS TO TAKE A COVID-19 VACCINE

**Question:** Do you expect that you will take one of the recently developed COVID-19 vaccines?

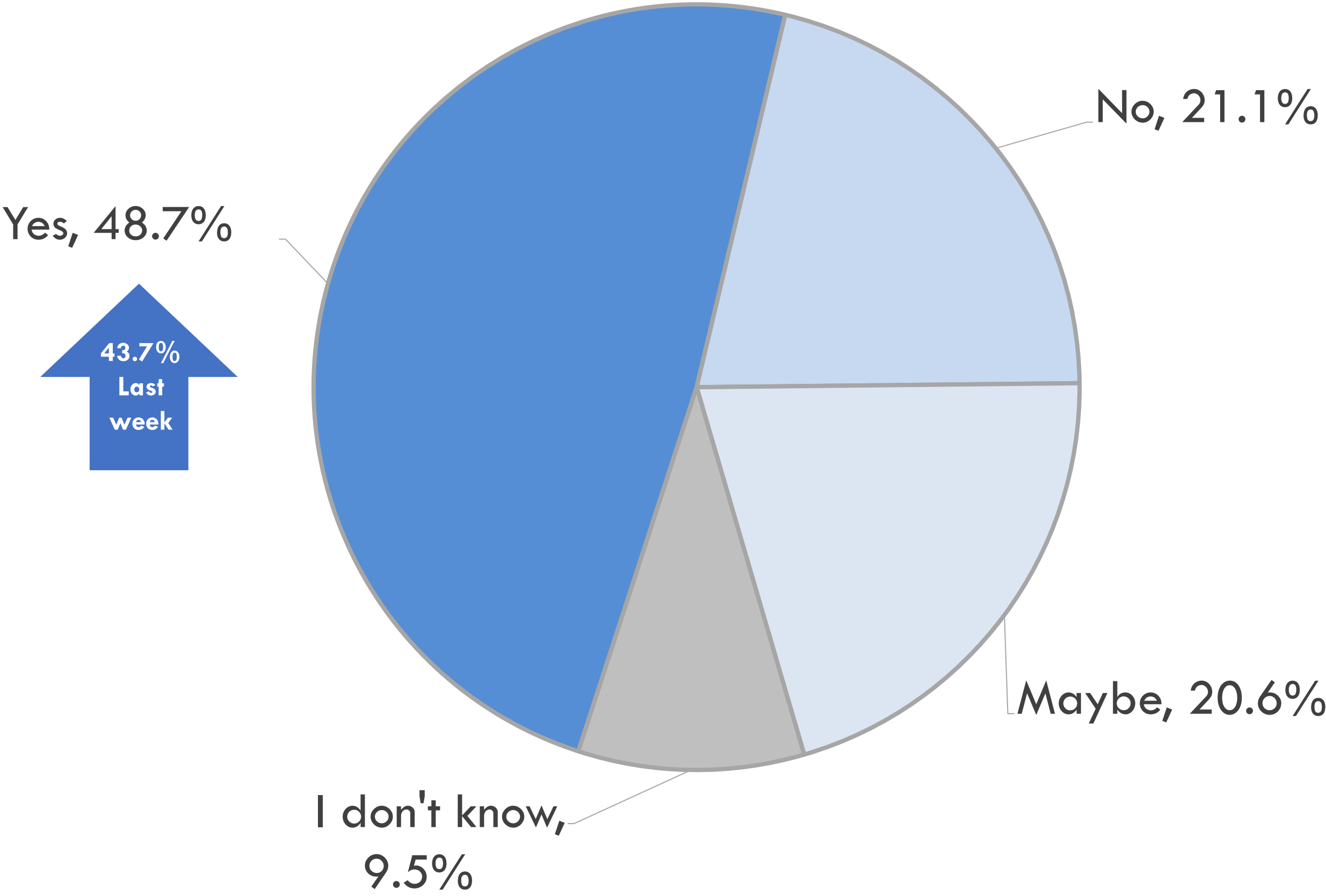
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



# VACCINES FOR CHILDREN

**Question:** Will you have your children take a COVID-19 vaccine? (Select one)

(Base: Wave 43 data. Respondents with school-aged children, 308 completed surveys. Data collected Jan 1-3, 2020)

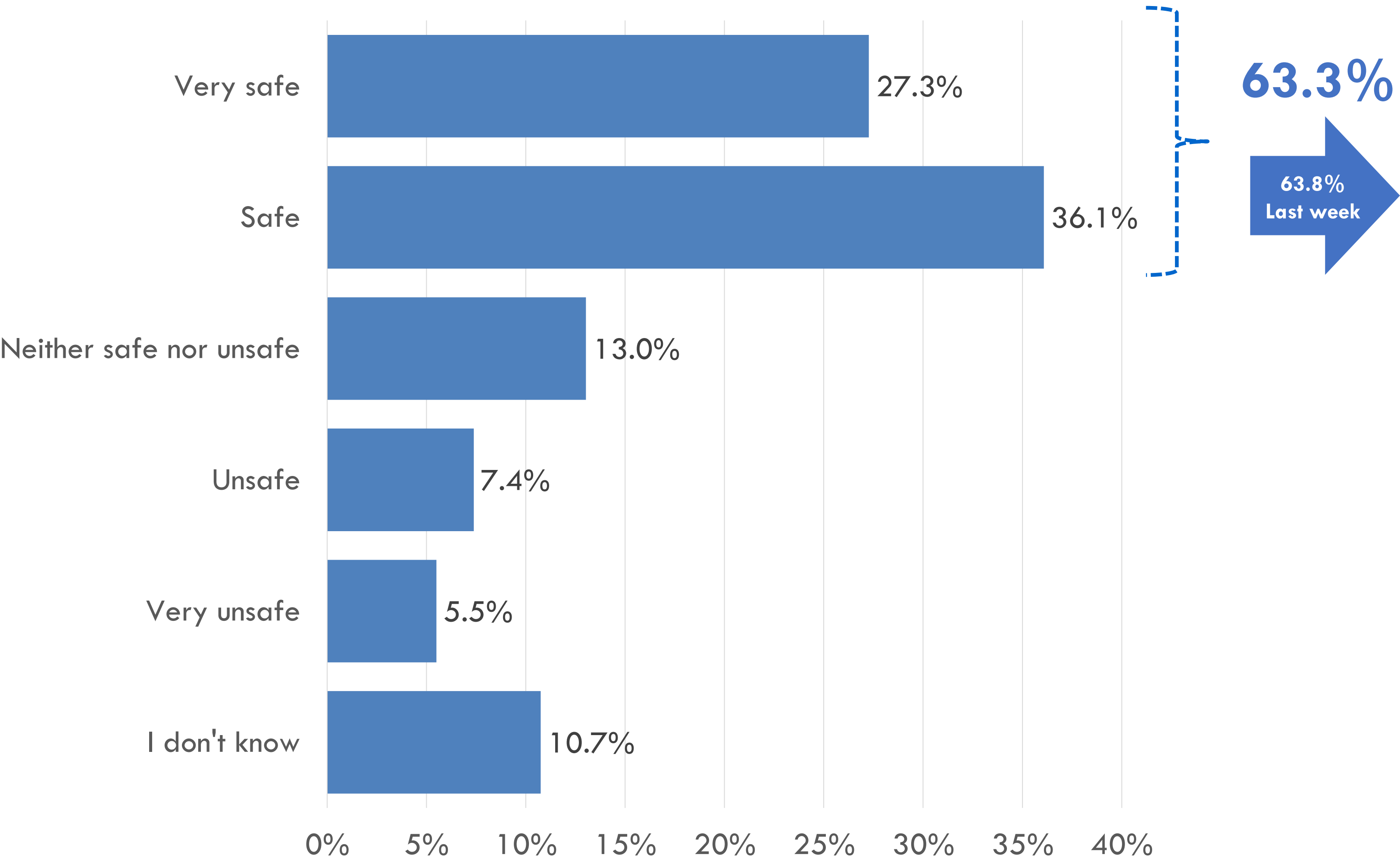




# EXPECTED SAFETY OF COVID-19 VACCINES

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

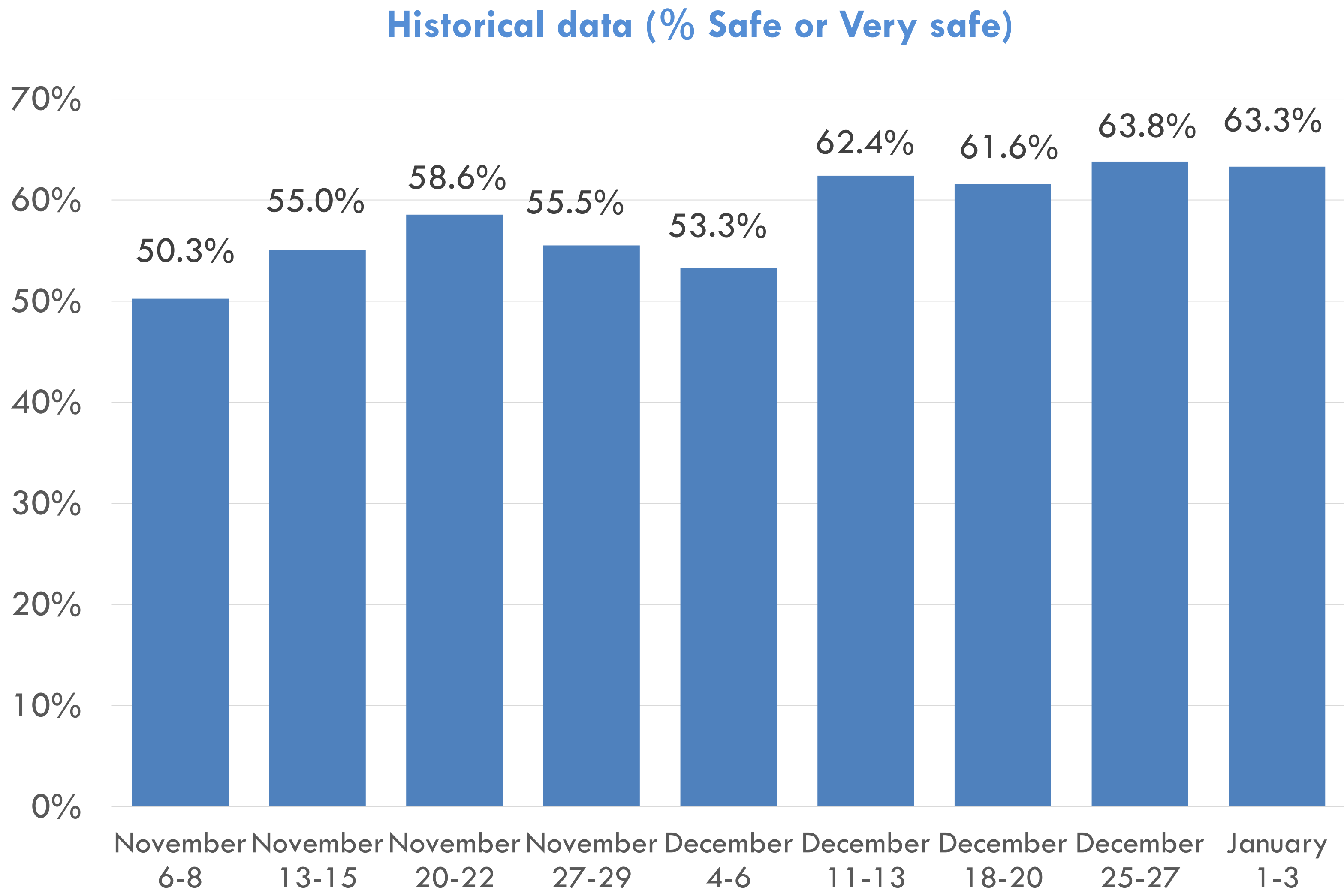
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



# EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



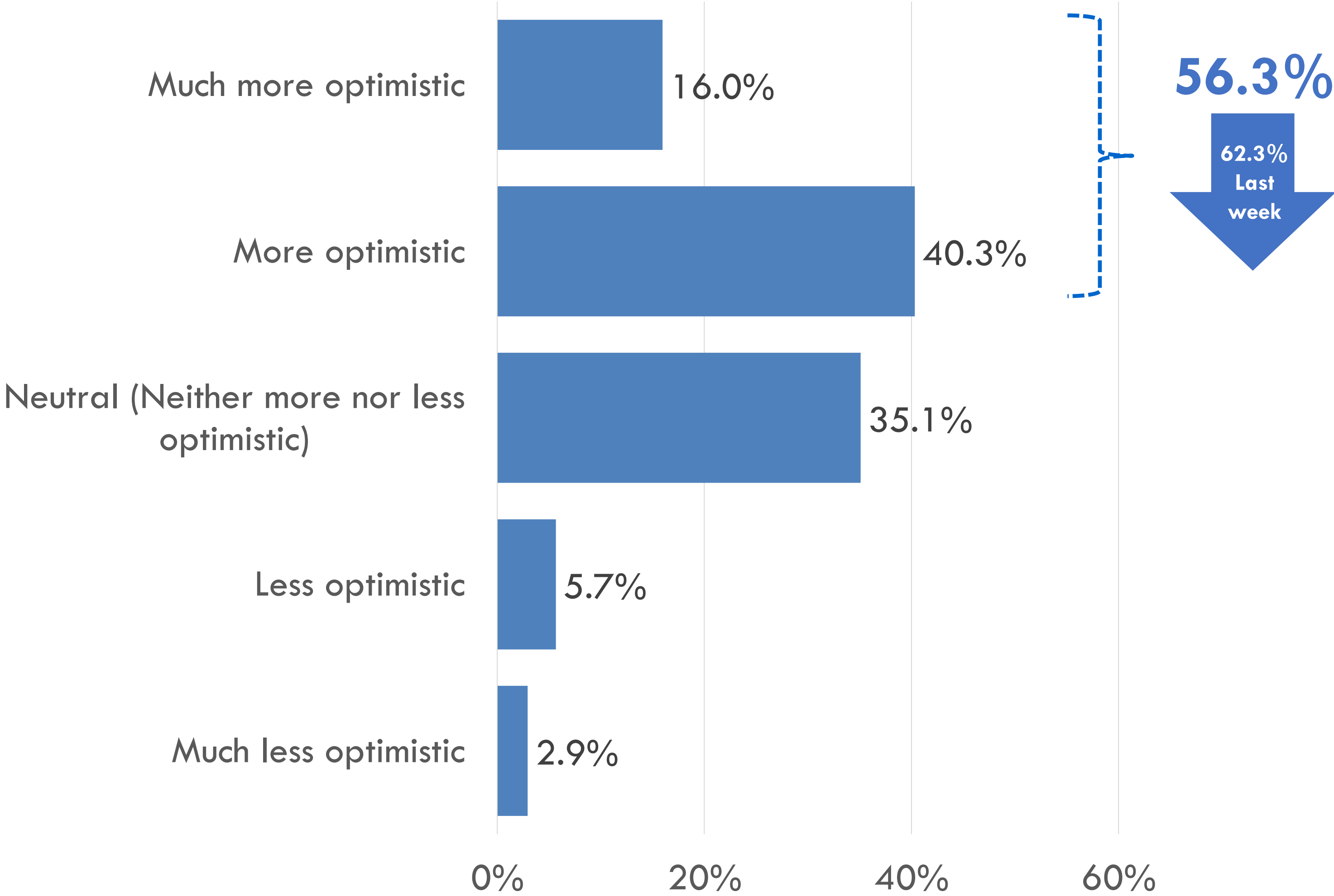


# VACCINES & OPTIMISM FOR RETURN TO NORMAL IN NEXT 6 MONTHS

**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: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)*

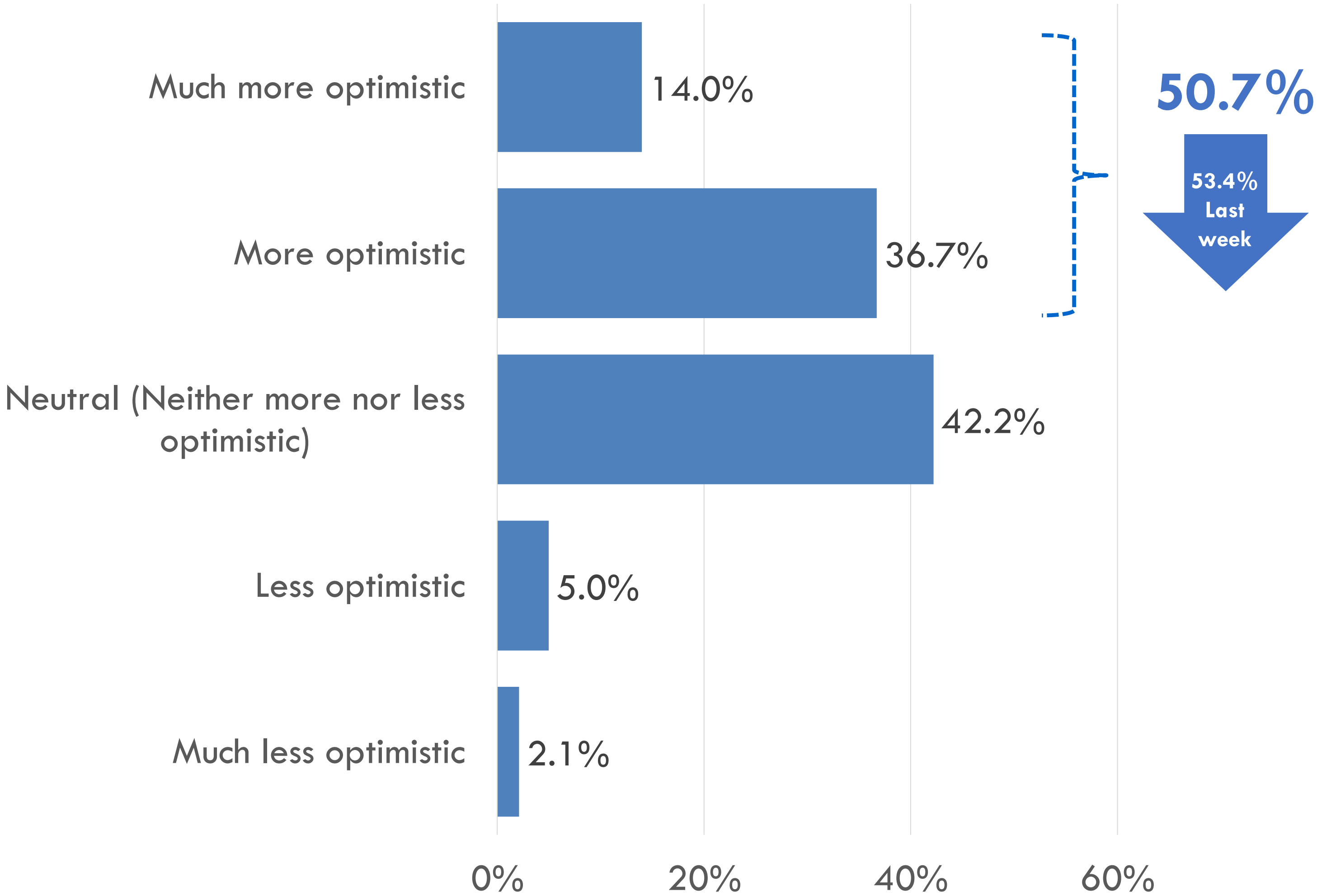


# VACCINES & OPTIMISM FOR SAFE TRAVEL IN NEXT 6 MONTHS

**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 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)*

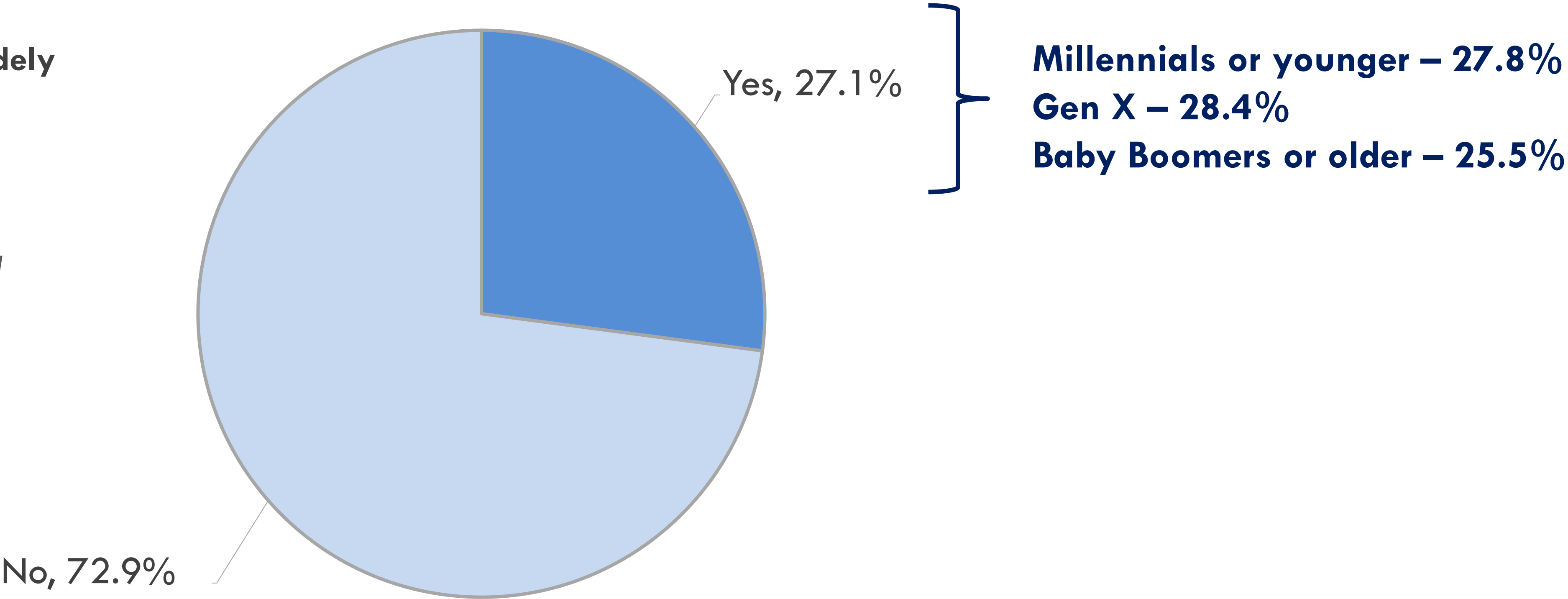




# TRAVEL PLANS DUE TO COVID-19 VACCINES

**Question:** Have you begun planning (or booking) any future travel in anticipation of the COVID-19 vaccine being widely available? (Select one)

*(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)*

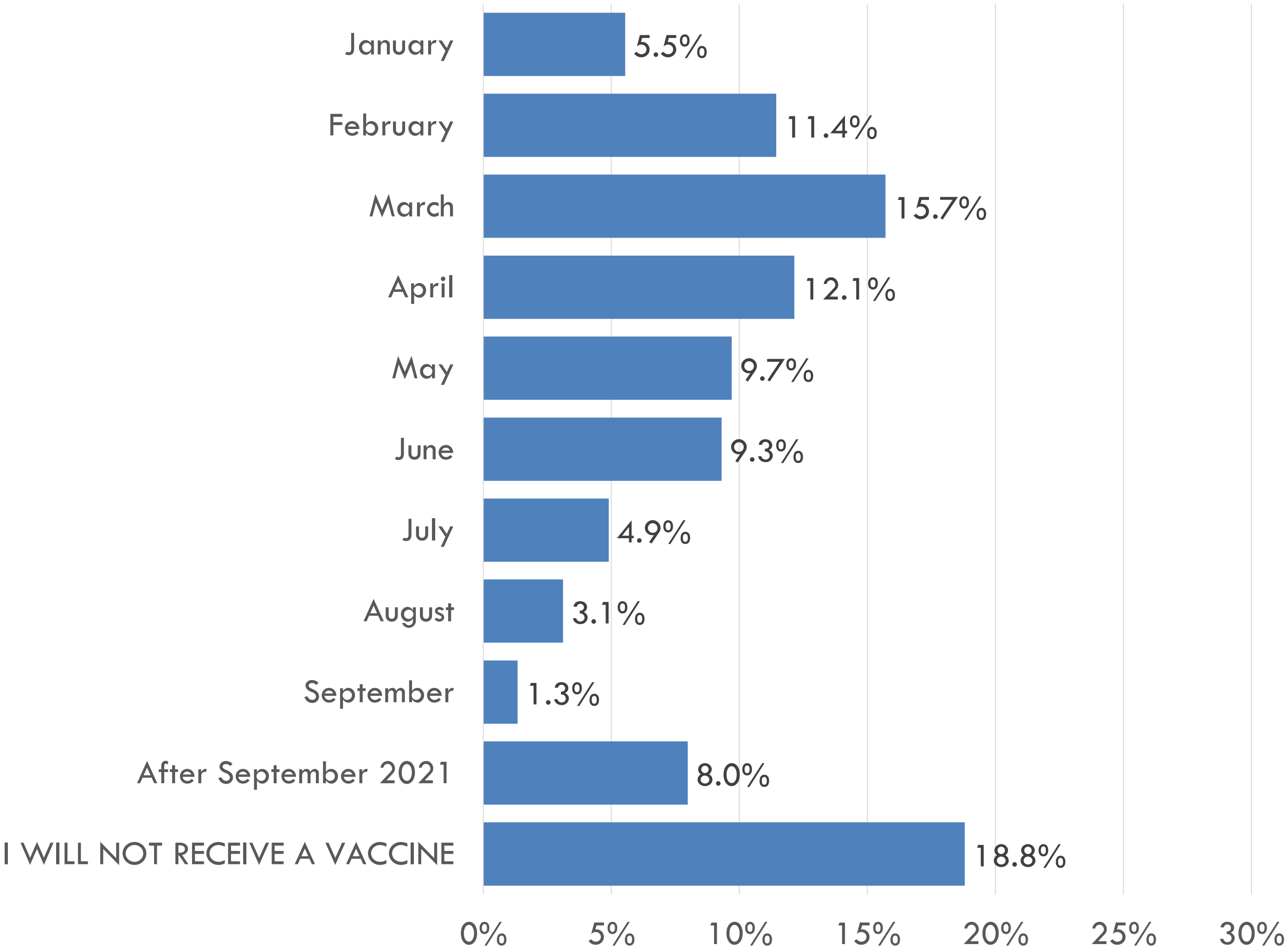


# EXPECTED MONTH OF VACCINATION

**Question:** Given what you know now, in which month do you expect to receive a vaccine? (Select one)

(If you are uncertain, select the month you think it is **MOST LIKELY** you will get a vaccination)

(Base: Waves 43 data. Respondents who have not yet been vaccinated, 1,143 completed surveys. Data collected January 1-3, 2021)





# Key Takeaways

- Fewer Americans say they will avoid travel until vaccines are widely available and more Americans than ever are saying they will take the vaccine.
- Americans continue to feel that the vaccine is safe.
- However, with the vaccine rollout going slower than anticipated, fewer Americans are optimistic about life returning to normal and being able to travel safely in the next 6 months.
- Over a quarter of American travelers have started planning future trips in anticipation of the COVID-19 vaccine being widely available.







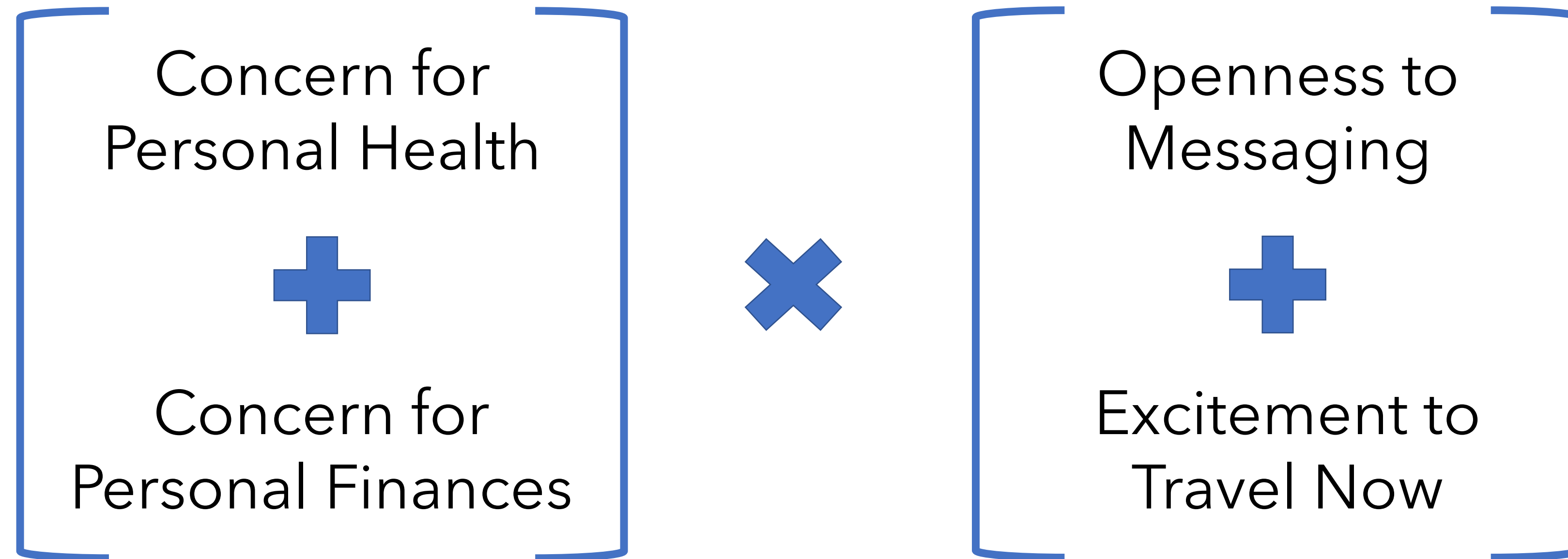
# Coronavirus Travel Sentiment Index

## Measuring the Potential Influence of Travel Marketing

Highlights from the Week of January 4th

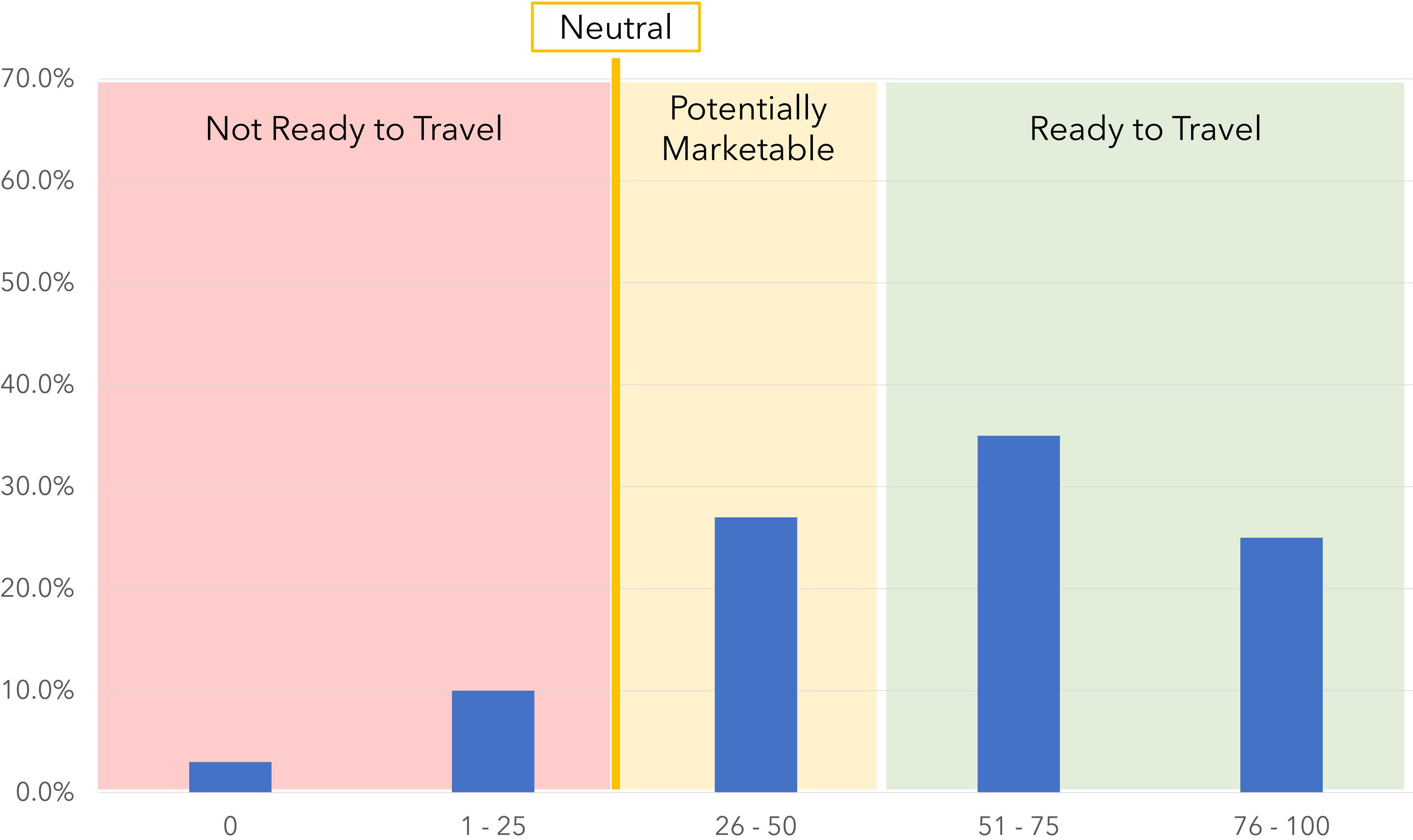


# Predictive Index Formula



\*Normalized to a 100pt scale

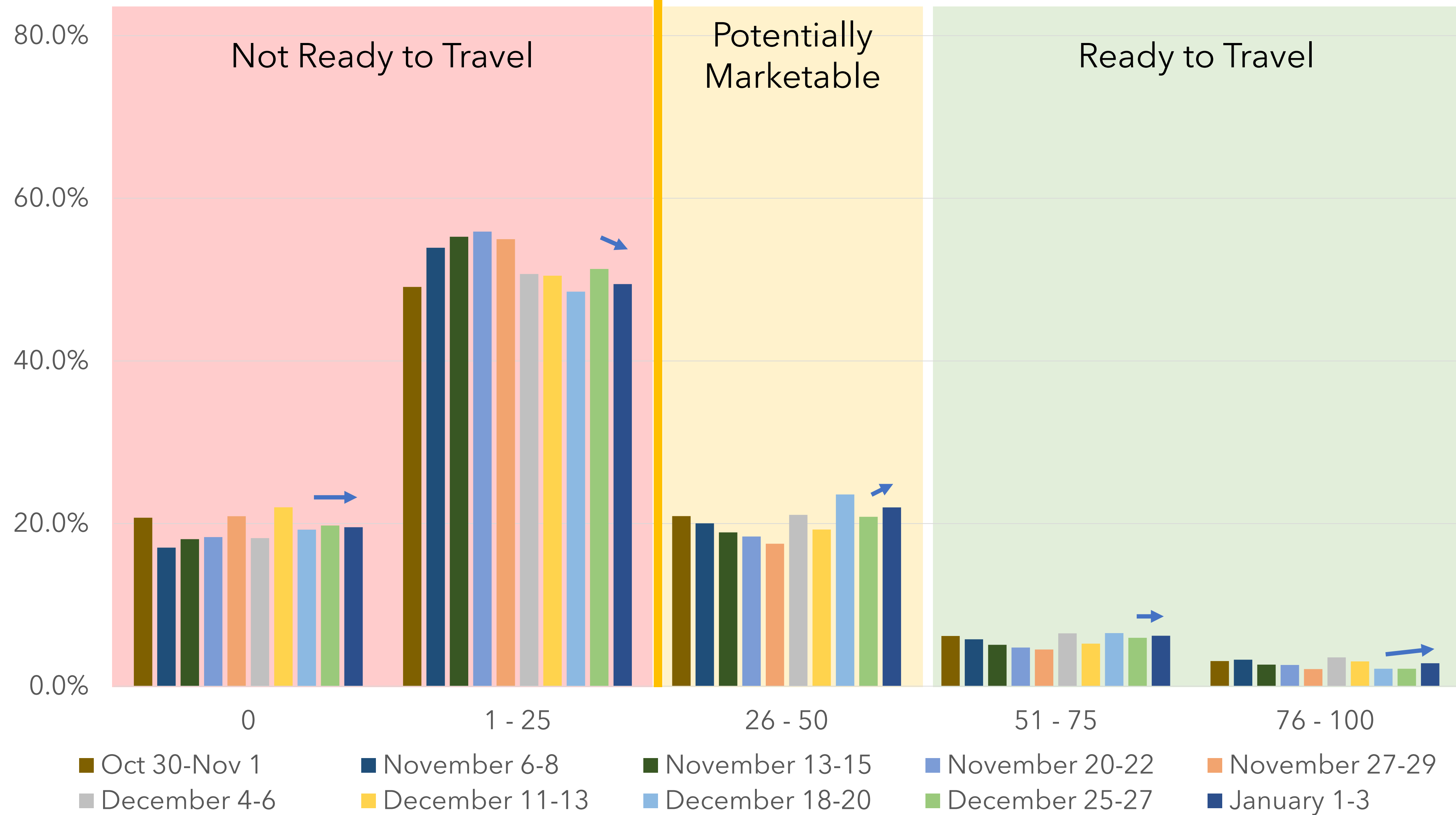
# Healthy Travel Outlook

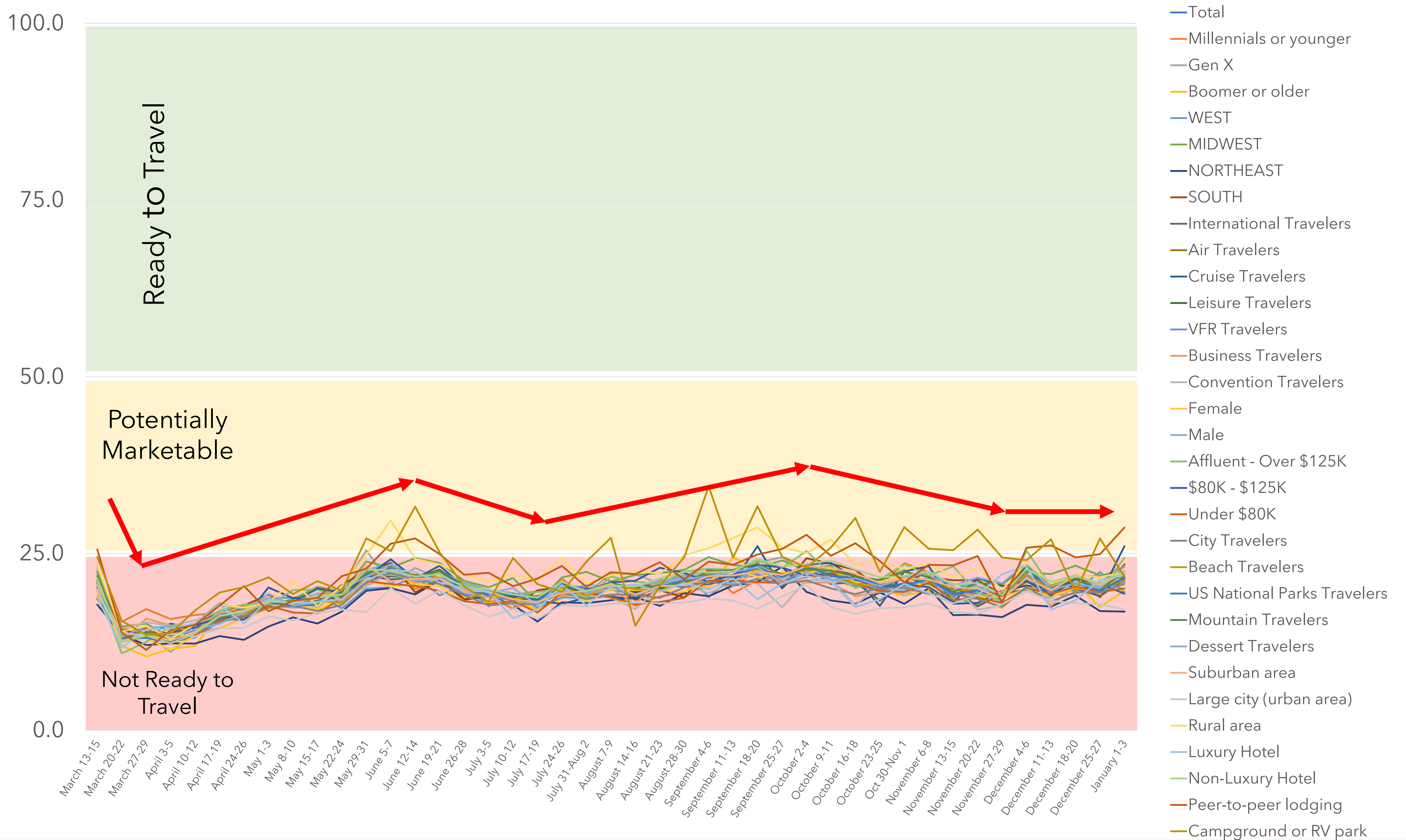




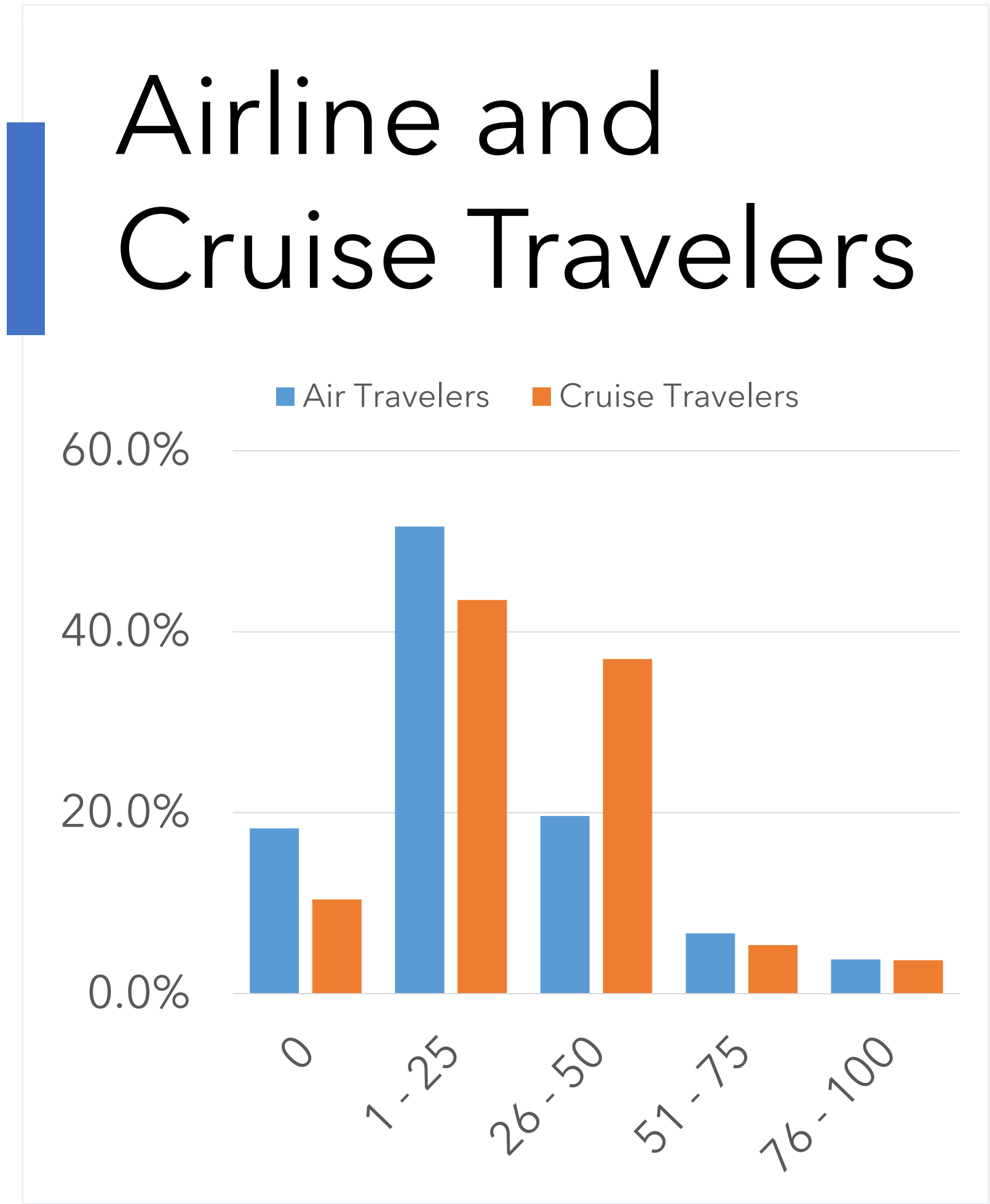
# Travel Outlook

Neutral

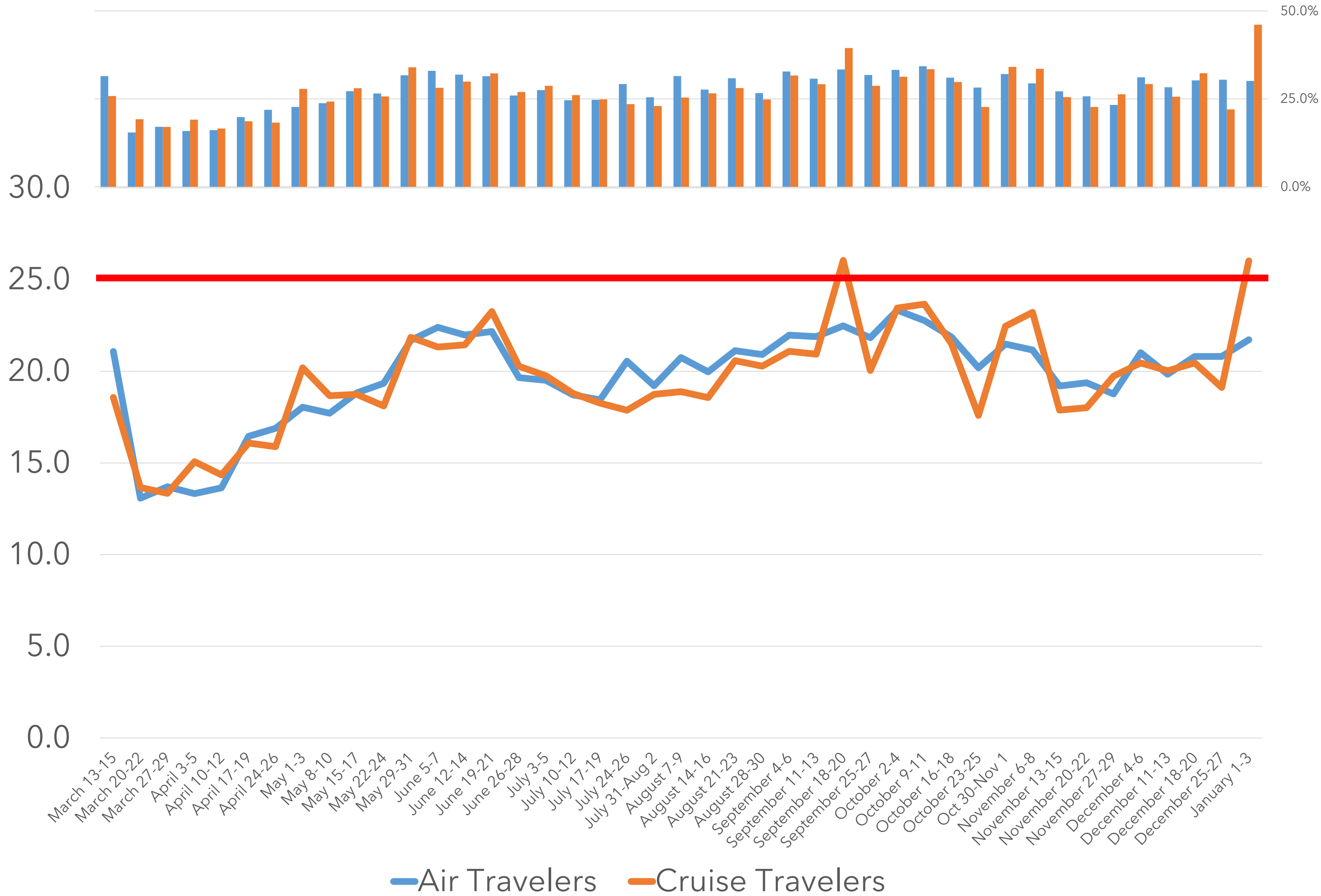




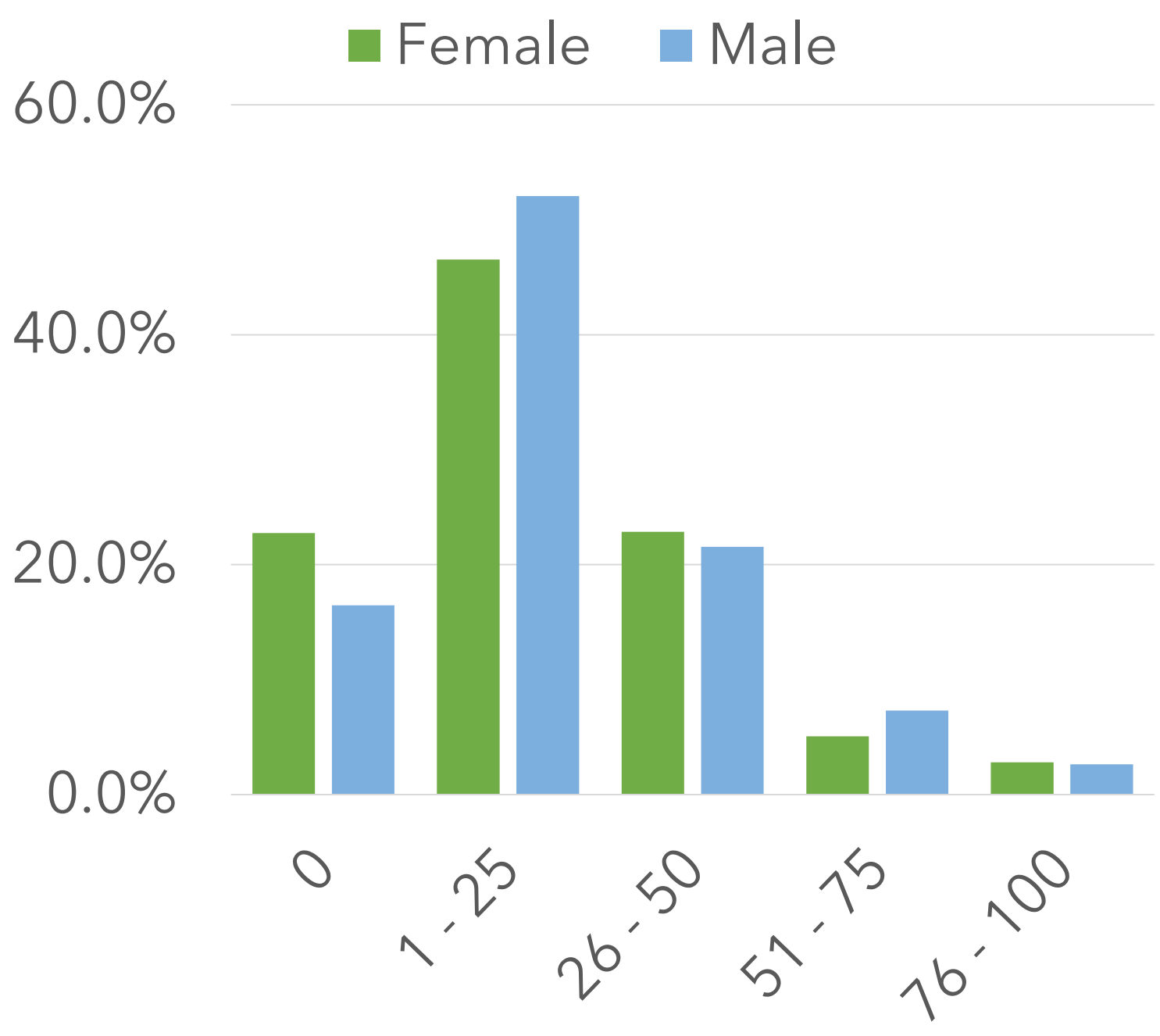




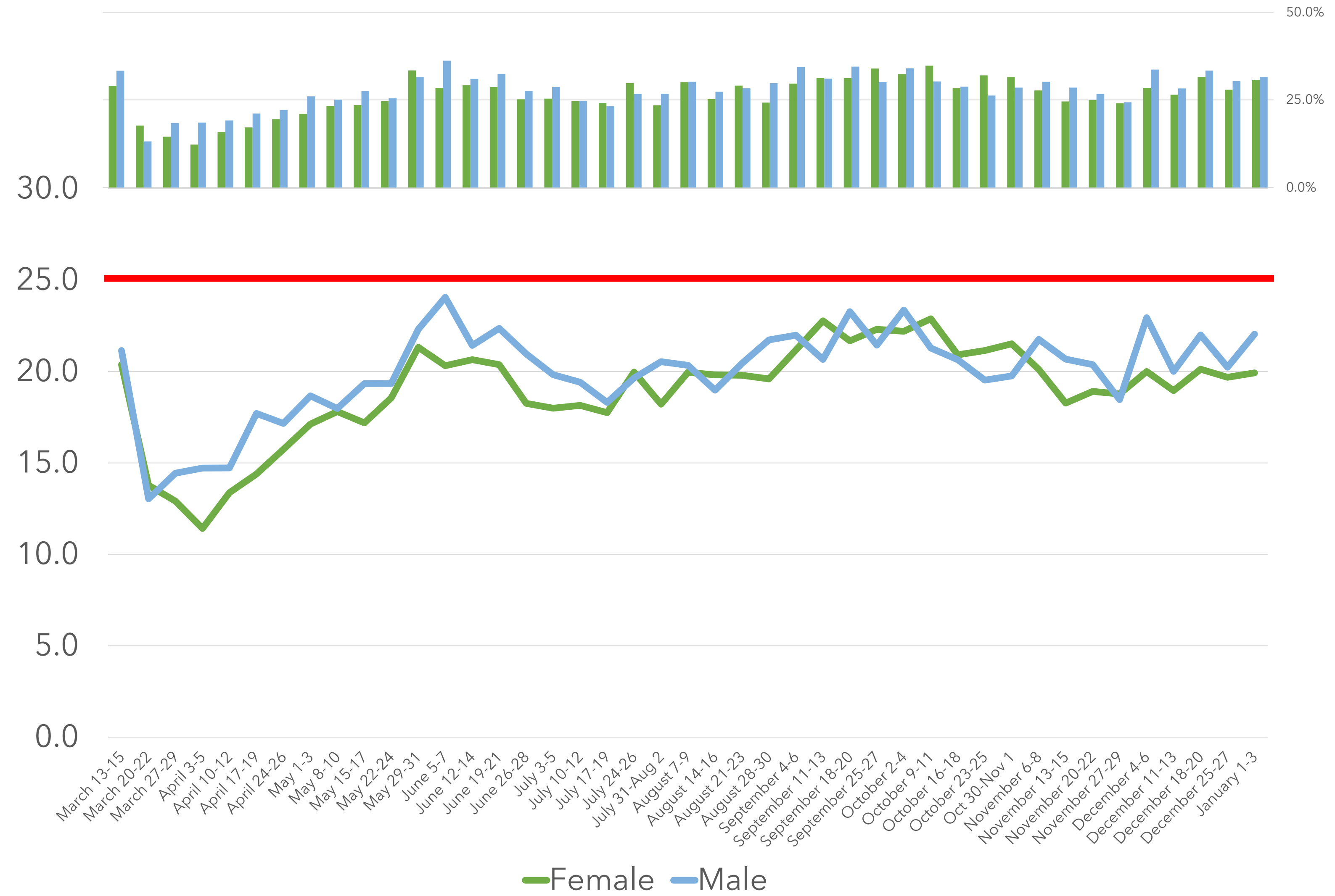
Percent Potentially Marketable  
(Index Above 25)



# Gender



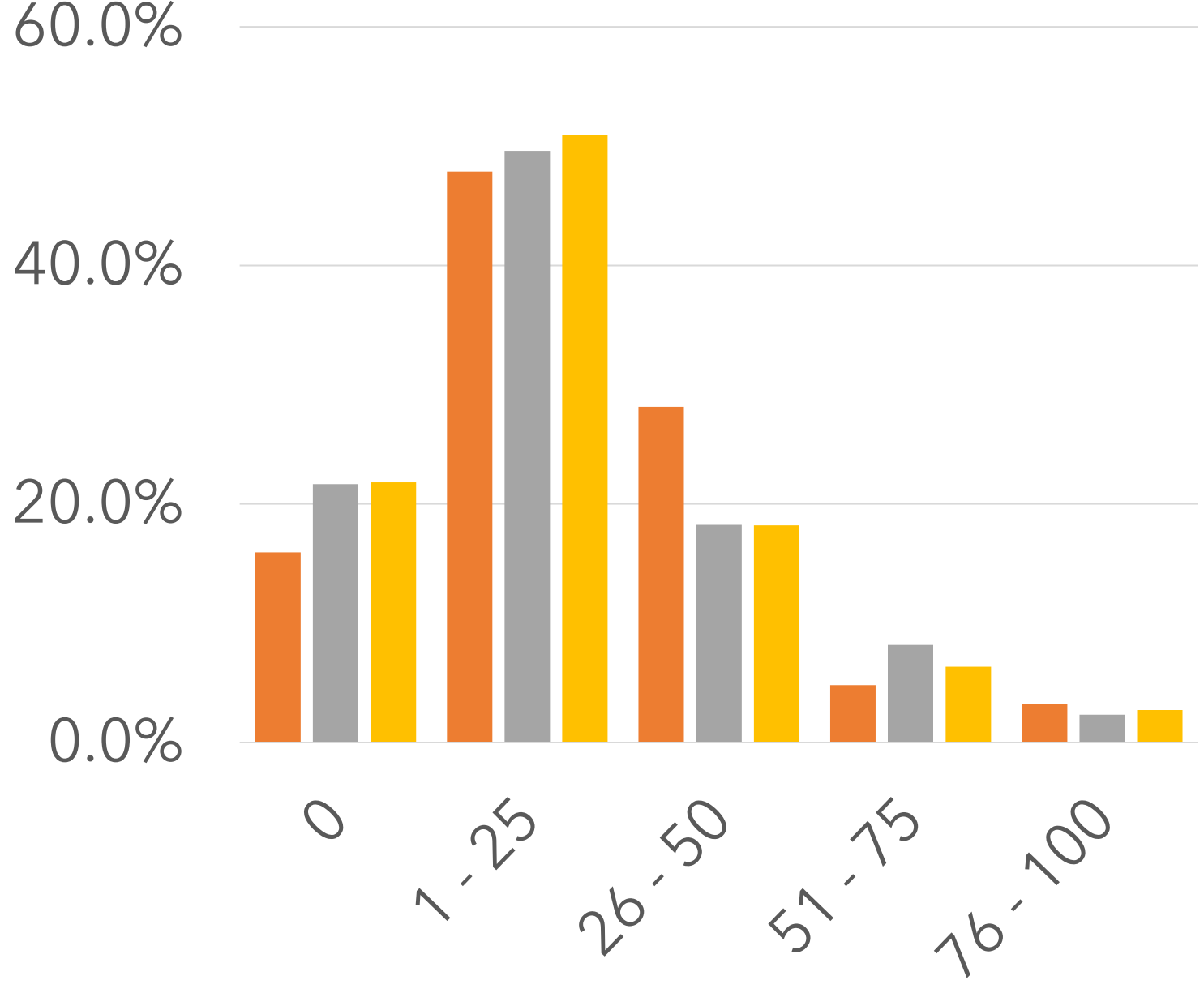
## Percent Potentially Marketable (Index Above 25)



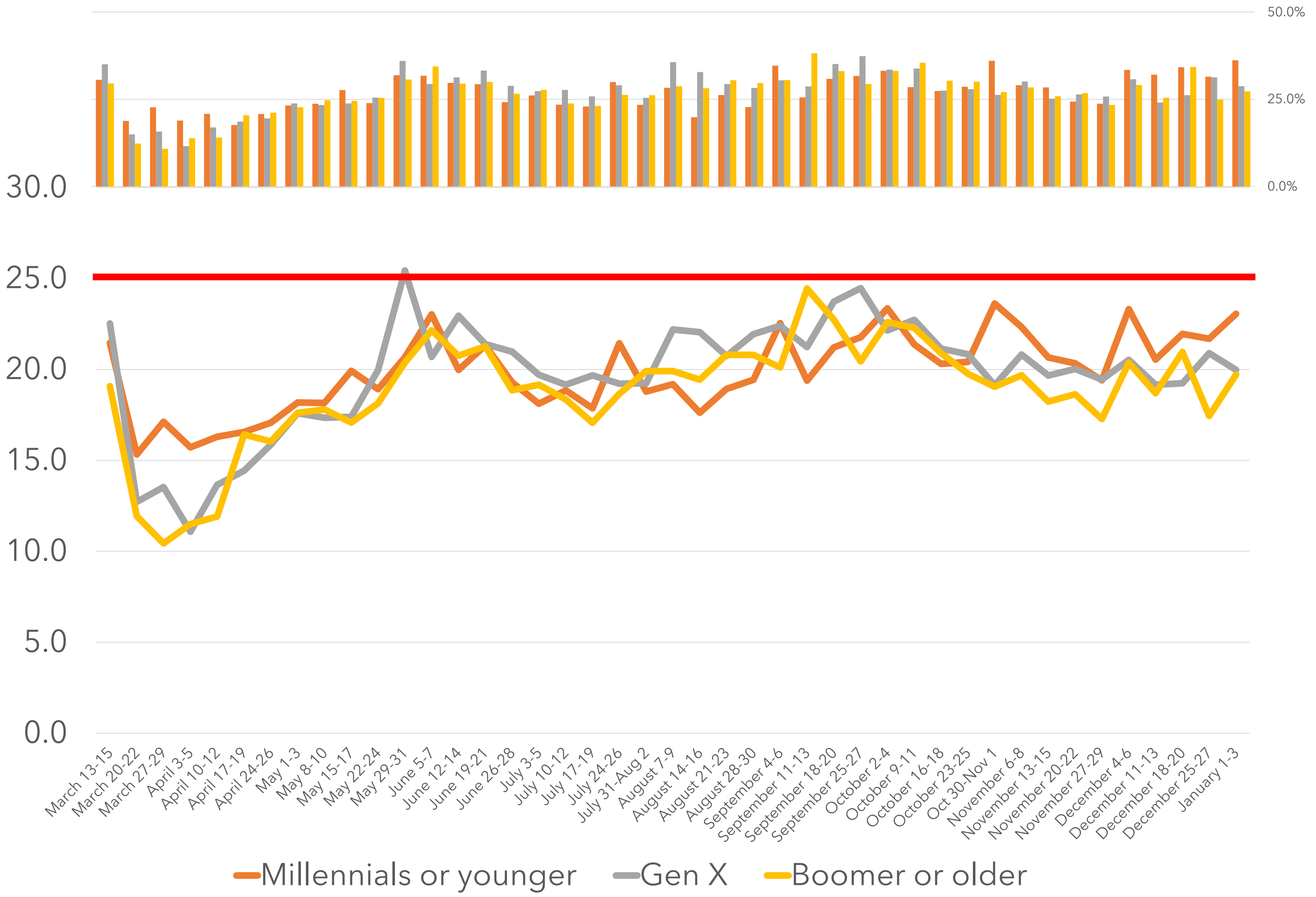


# Generation

Millennials or younger    Gen X    Boomer or older



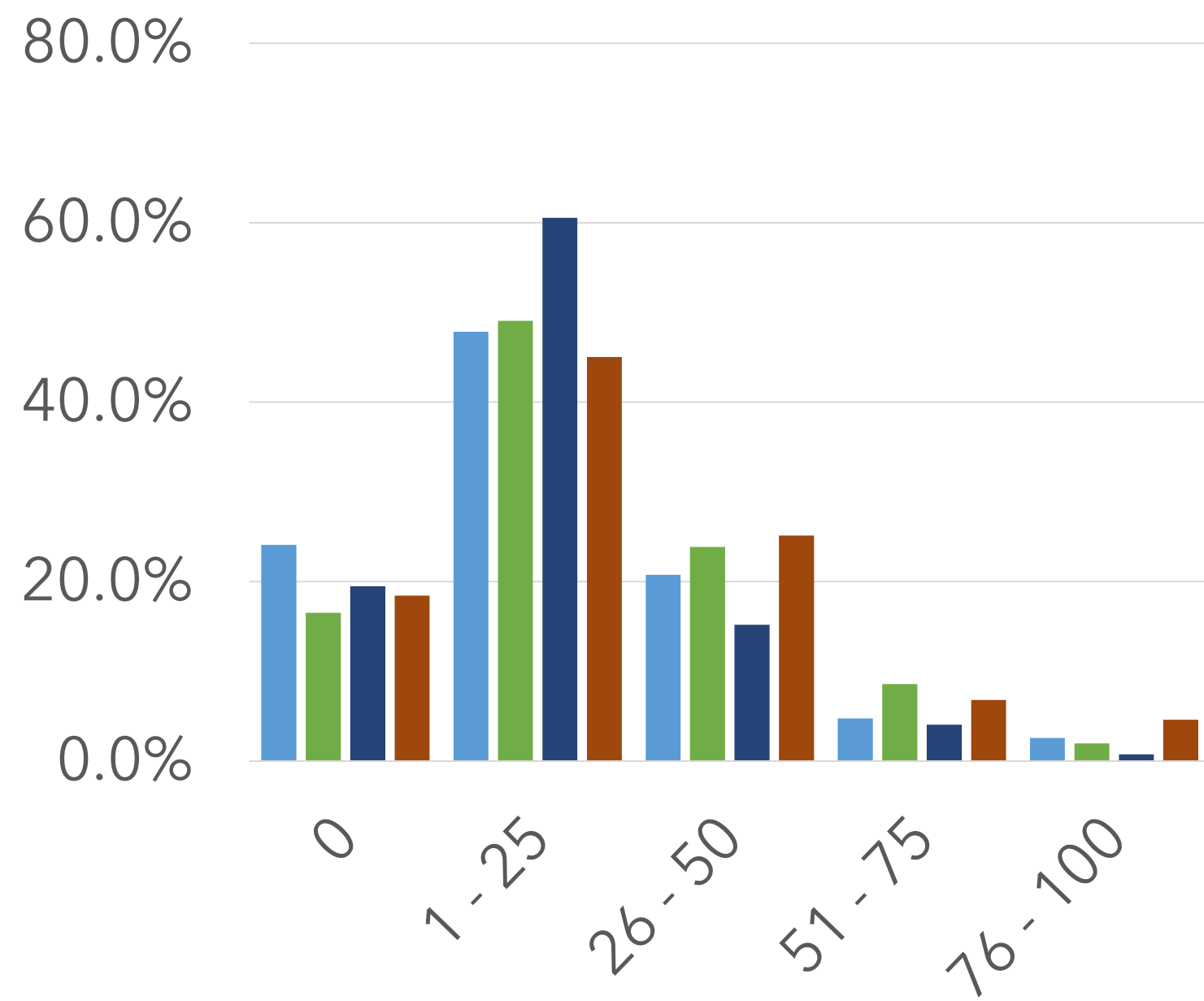
## Percent Potentially Marketable (Index Above 25)



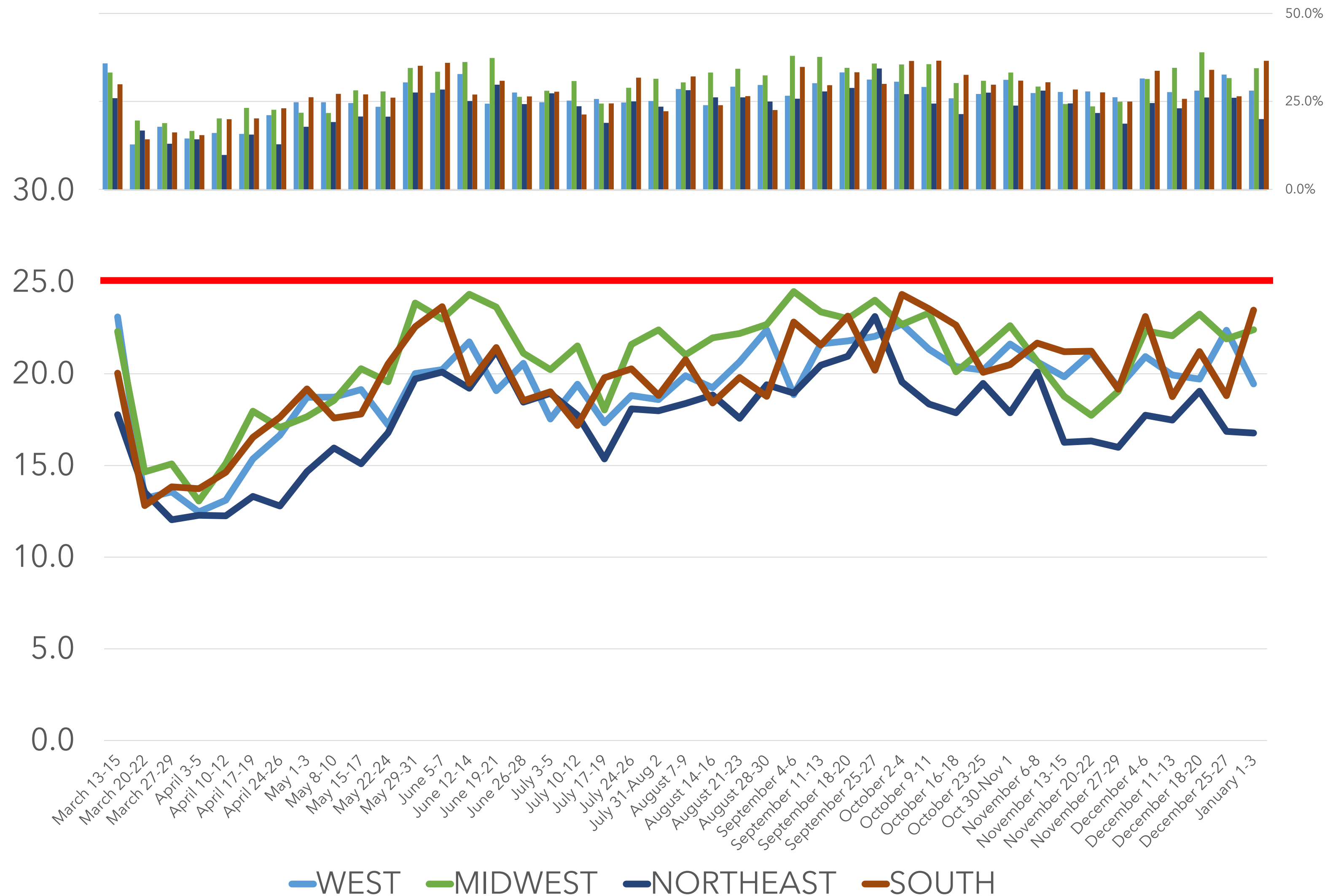
Millennials or younger    Gen X    Boomer or older

# US Regions

WEST MIDWEST NORTHEAST SOUTH



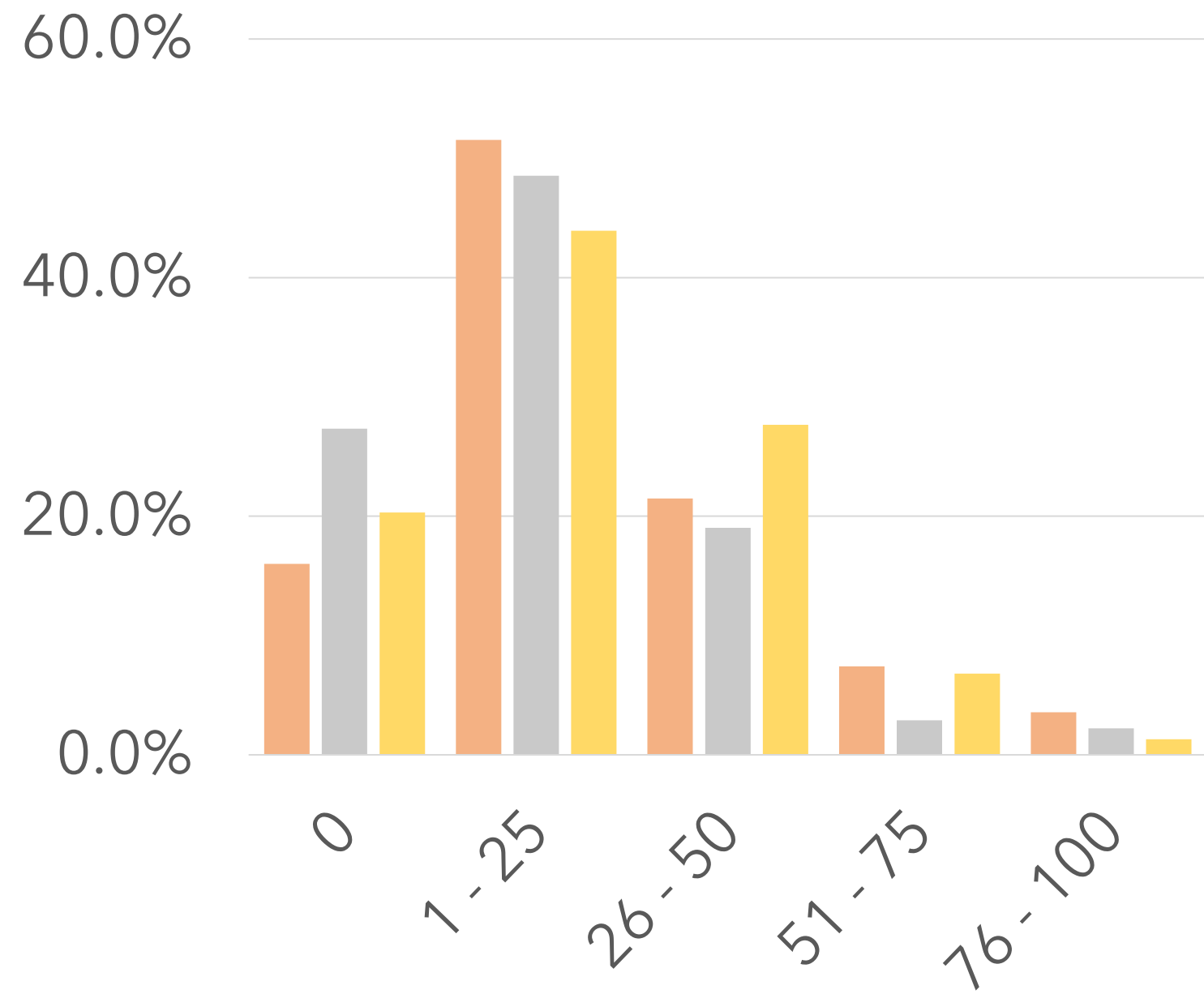
## Percent Potentially Marketable (Index Above 25)



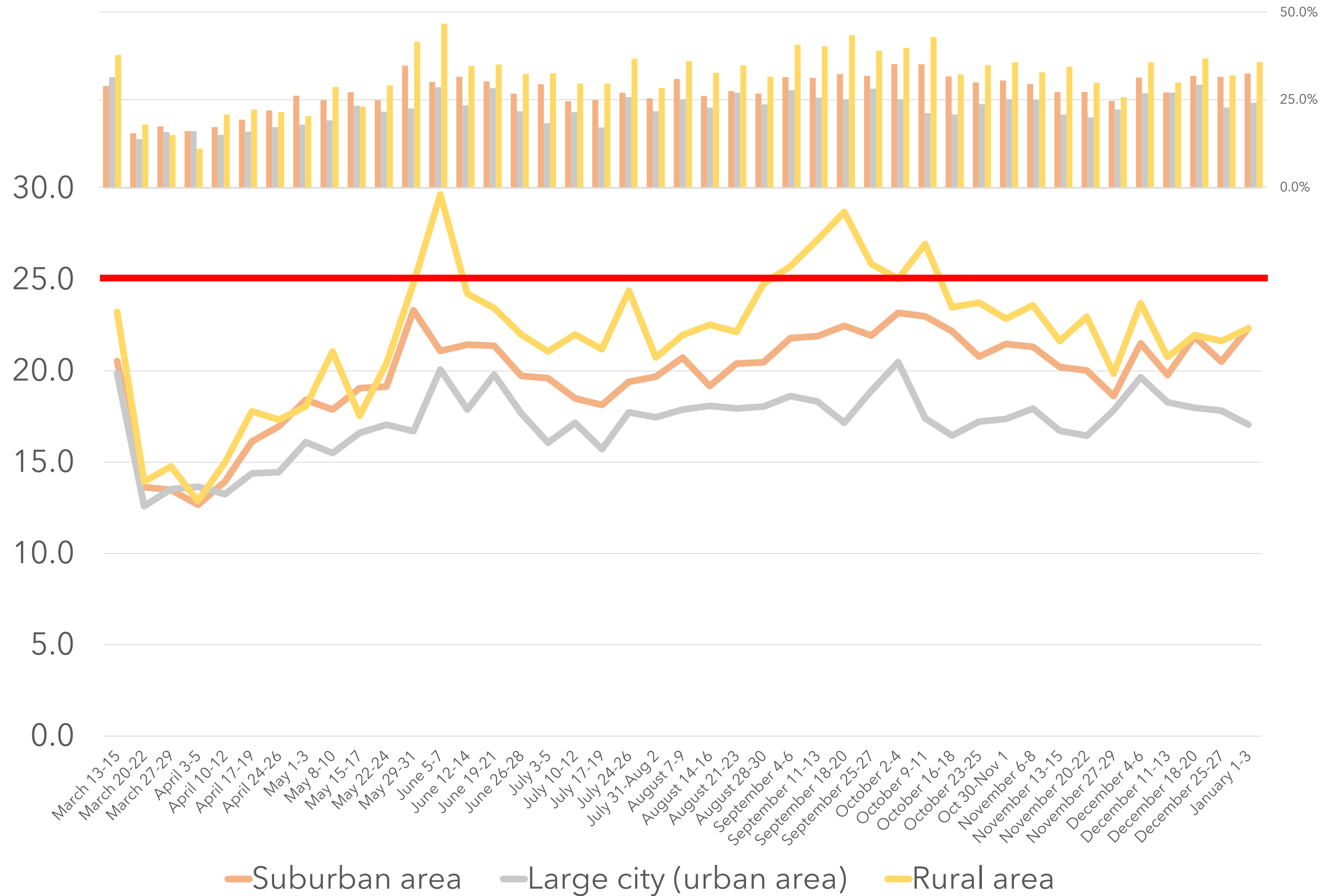


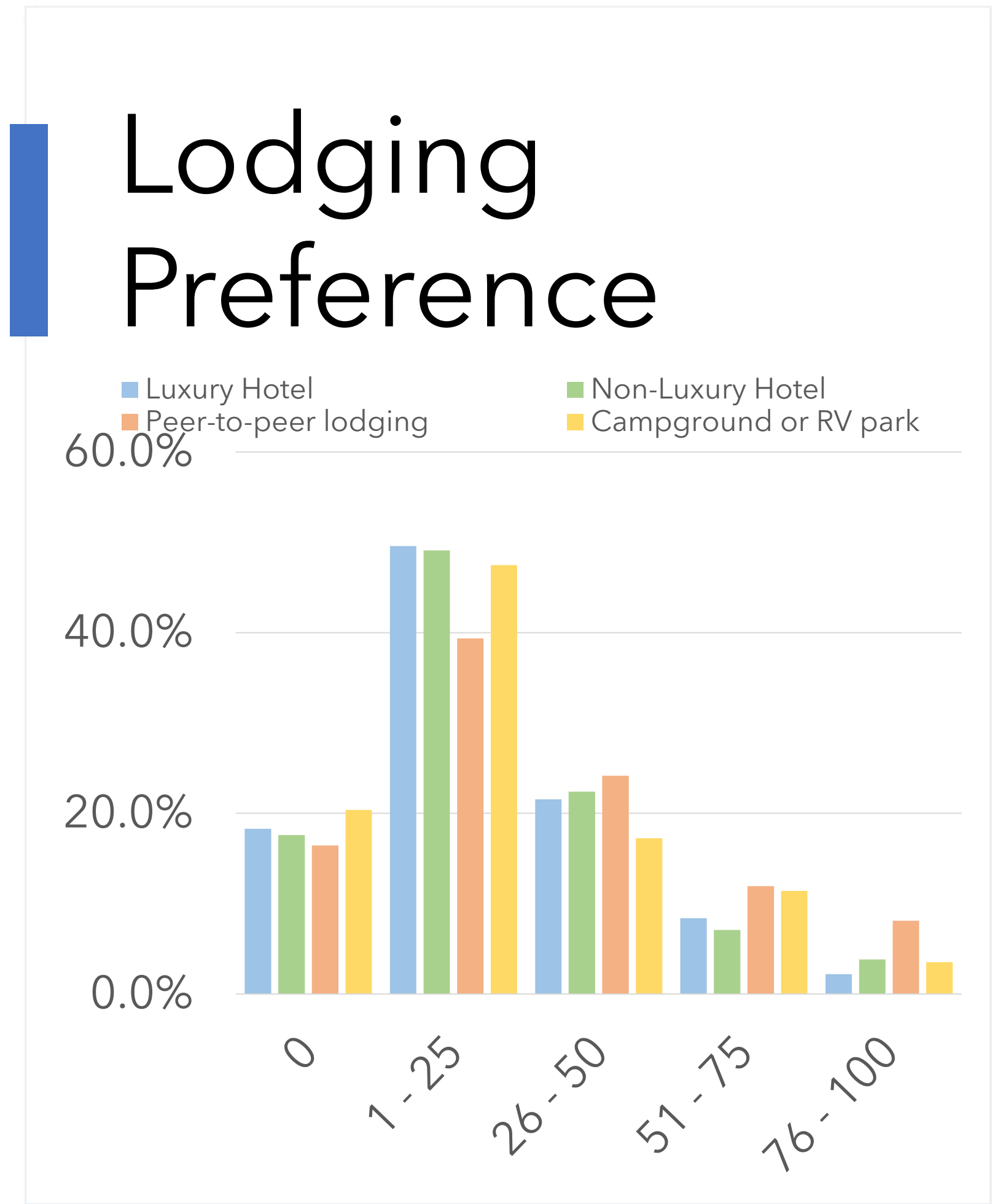
# Residence Type

Suburban area Large city (urban area) Rural area

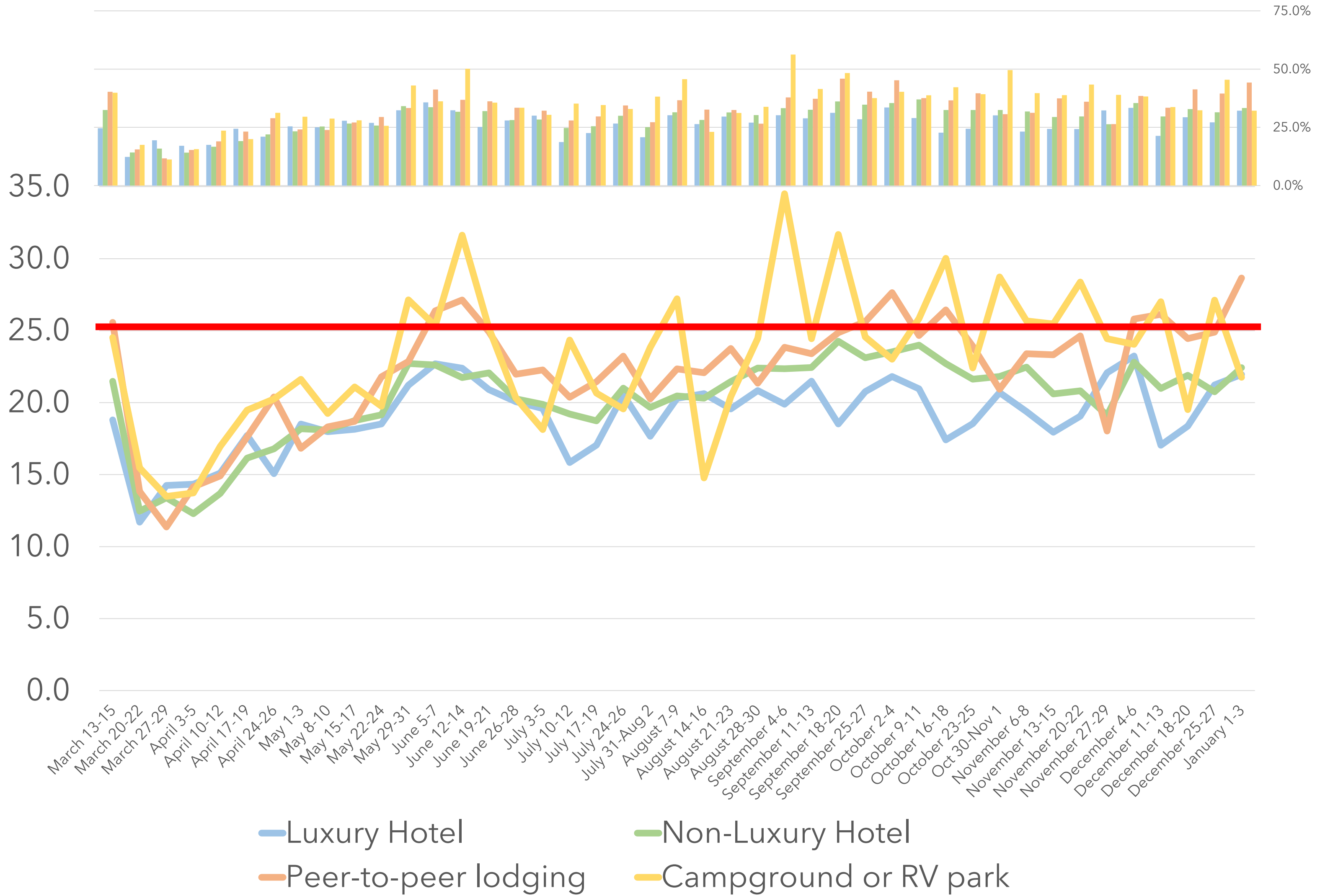


## Percent Potentially Marketable (Index Above 25)





Percent Potentially Marketable  
(Index Above 25)



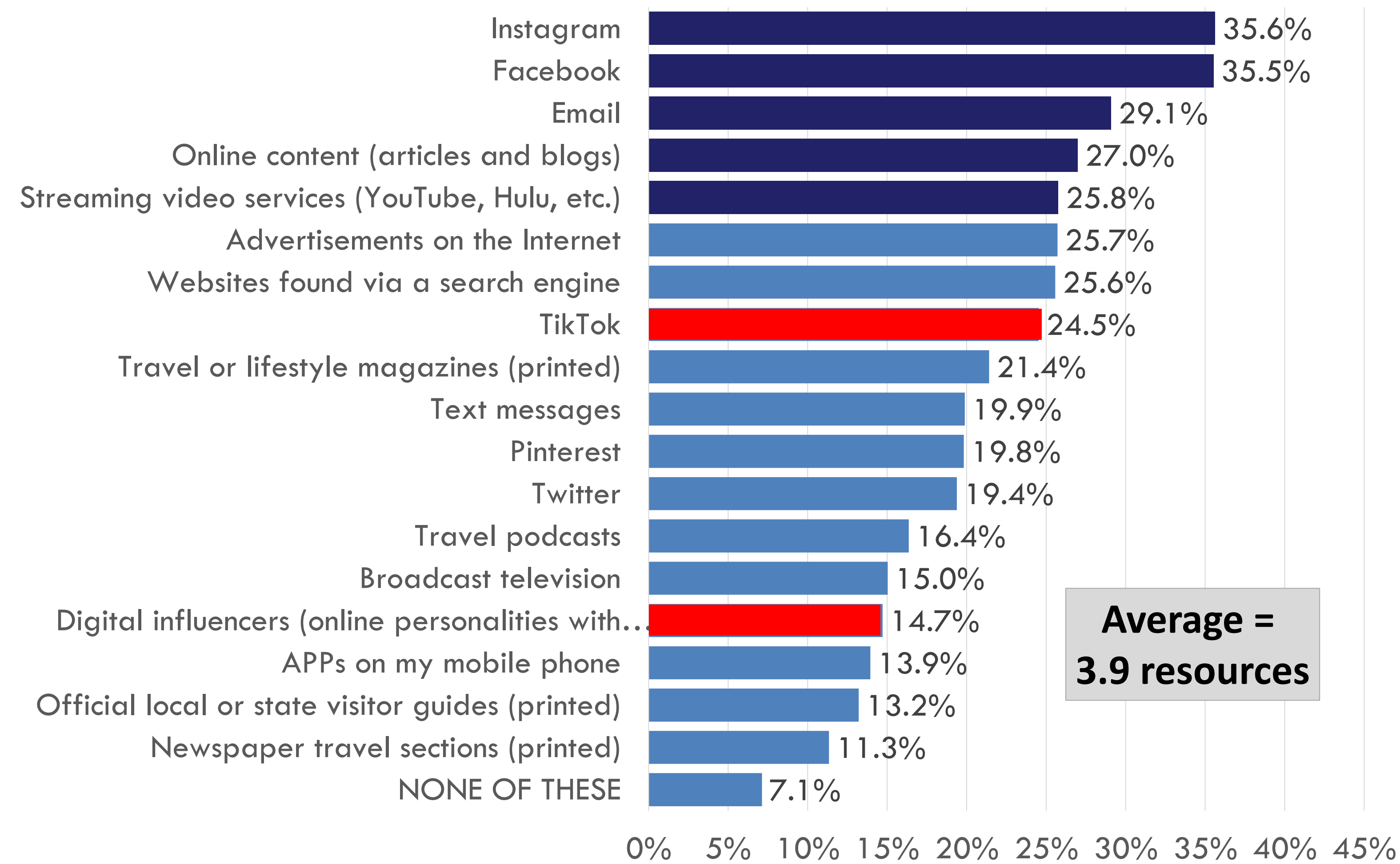






# RECEPTIVITY TO MARKETING CHANNELS

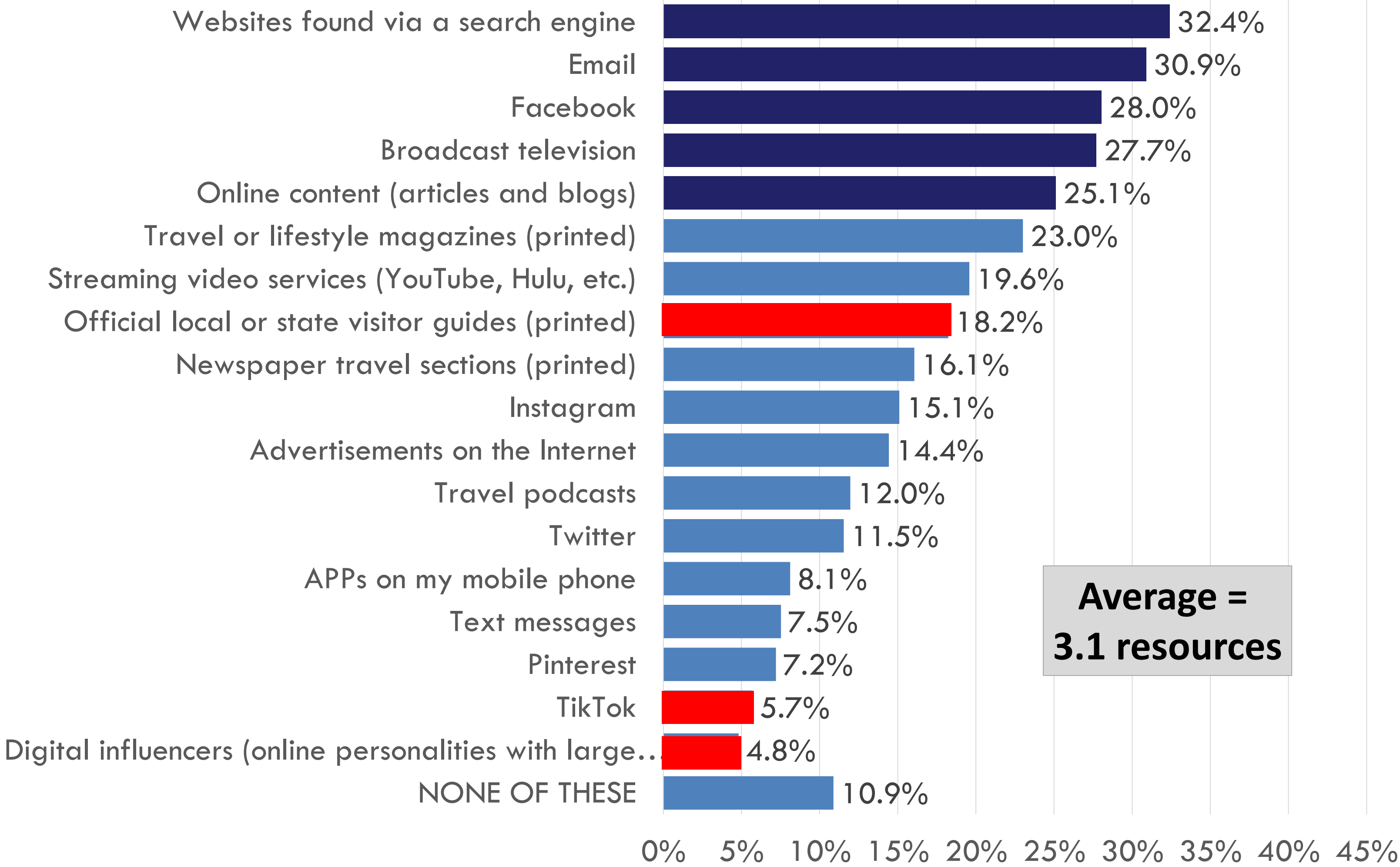
## Millennials and Younger





# RECEPTIVITY TO MARKETING CHANNELS

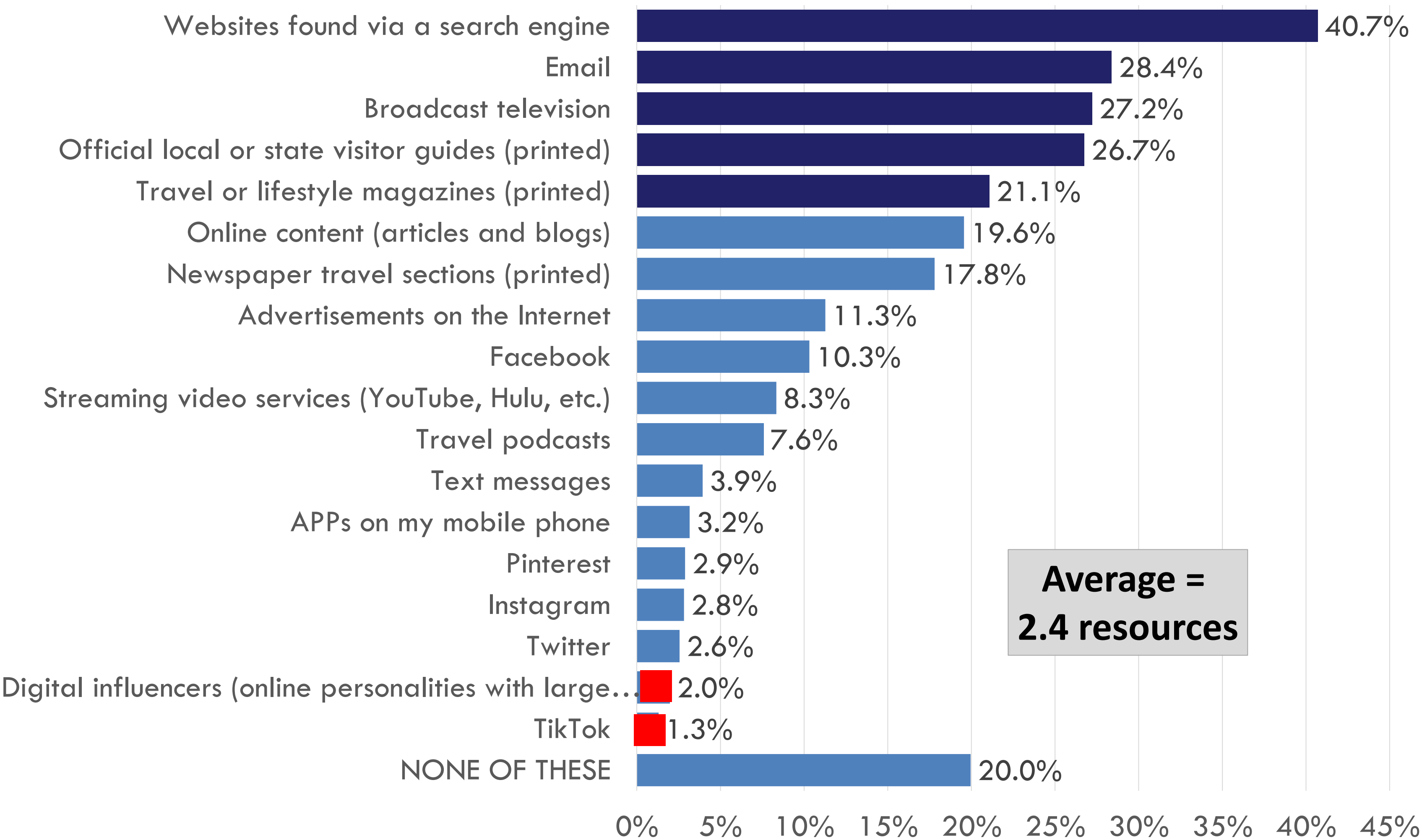
## Generation X





# RECEPTIVITY TO MARKETING CHANNELS

## Boomers and Older





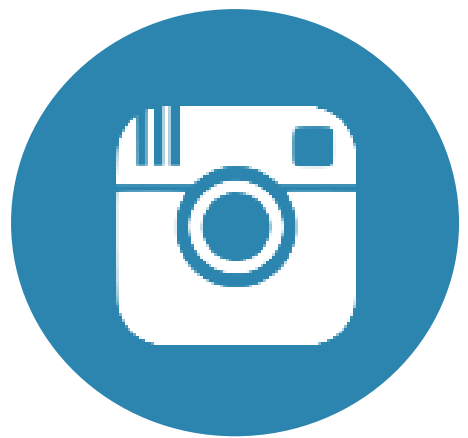
## FOLLOW US ON SOCIAL MEDIA



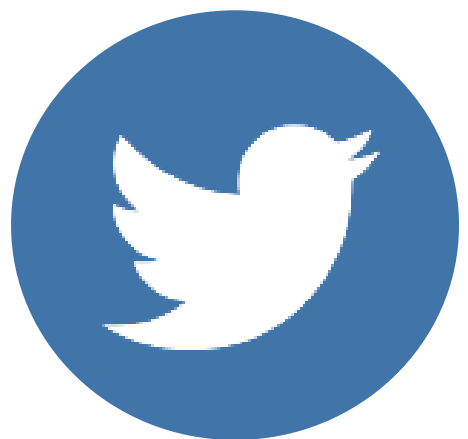
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A nighttime cityscape with various buildings and lights. Overlaid on the image are several white location pin icons and curved lines connecting them, representing geolocation data. The background is a dark blue sky with city lights.

**Deeper Insights from  
Geolocation Data:**

**Make Your Data  
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Unlock Powerful  
Trends and Best  
Serve Your Tourism  
Community**

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