# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

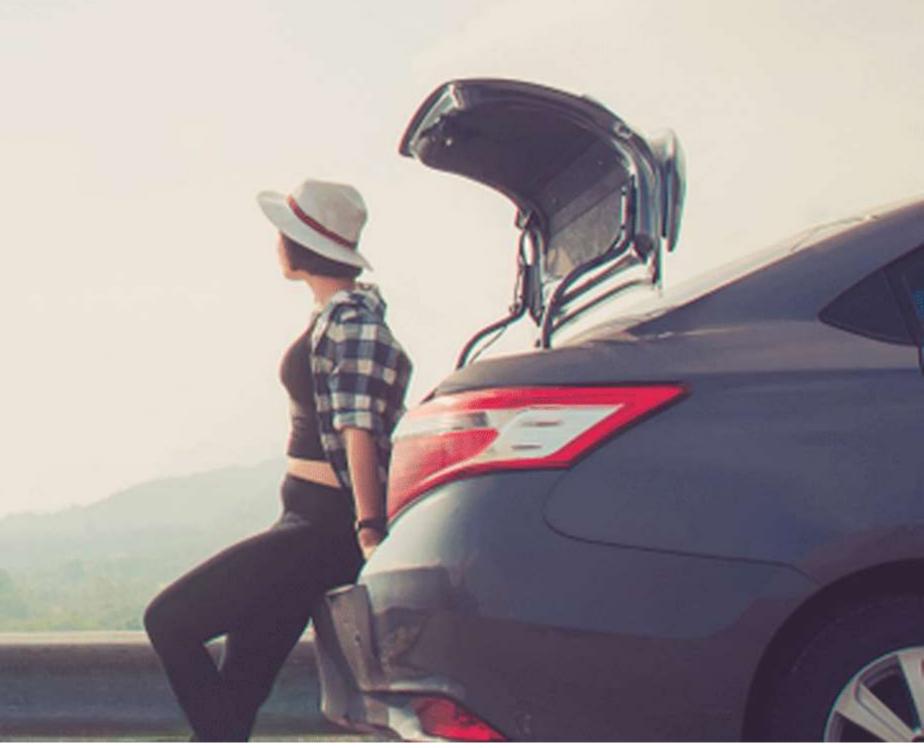
Presentation of Findings
December 8, 2020

Destination Analysts

# We Can Help You

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- Brand Performance
- Visitor Activity Analysis & Segmentation
- Persona Research
- Resident + Stakeholder Research
- Advertising Testing
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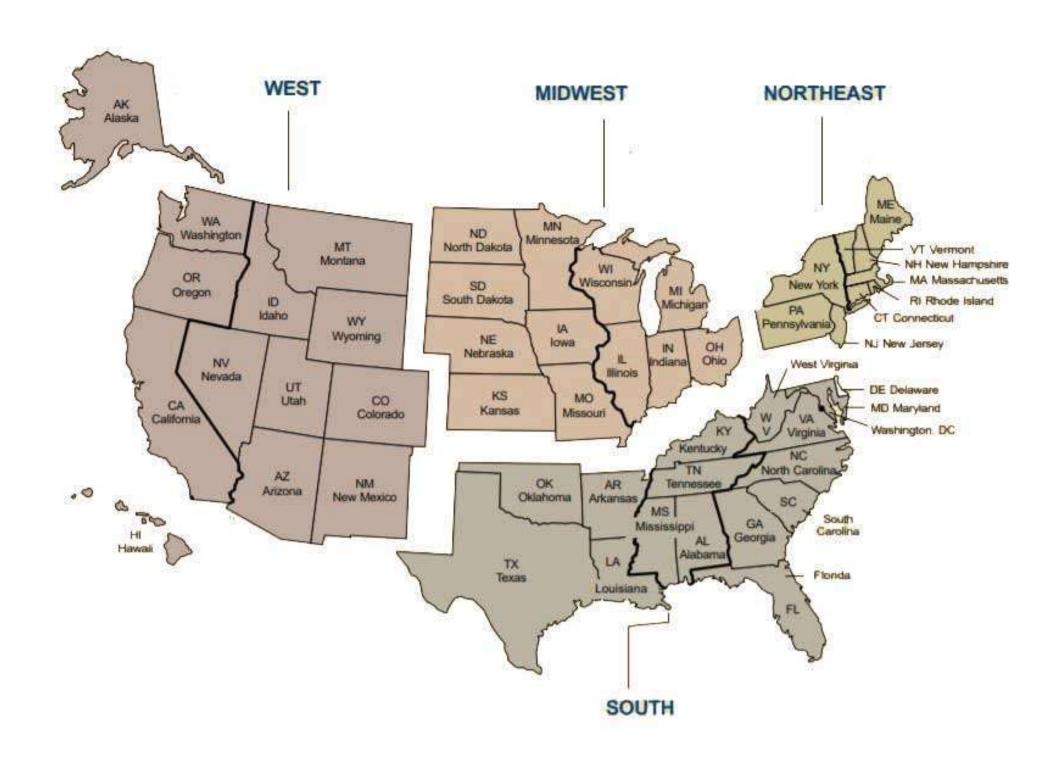
# Independent Unbiased Research



# 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 39 data (fielded December 4<sup>th</sup>-6<sup>th</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

#### U.S.Regions





# Coronavirus Travel Sentiment Index: What to Expect for the Remainder of 2020 & Beyond

- We will continue this weekly study into 2021 indefinitely
- The study WILL be conducted the weeks of the Christmas and New Years holidays, and findings will be released via email and on our blog as usual
- We will have our regular industry webinar at the same date and time Christmas week: Tuesday, December 22<sup>nd</sup> at 11:00am ET
- An online presentation of findings will be available for our research subscribers on Tuesday, December 28<sup>th</sup> at 11:00am ET. There will not be a public webinar
- Industry webinars will resume in the new year at the same day and time: Tuesdays at 11:00am ET





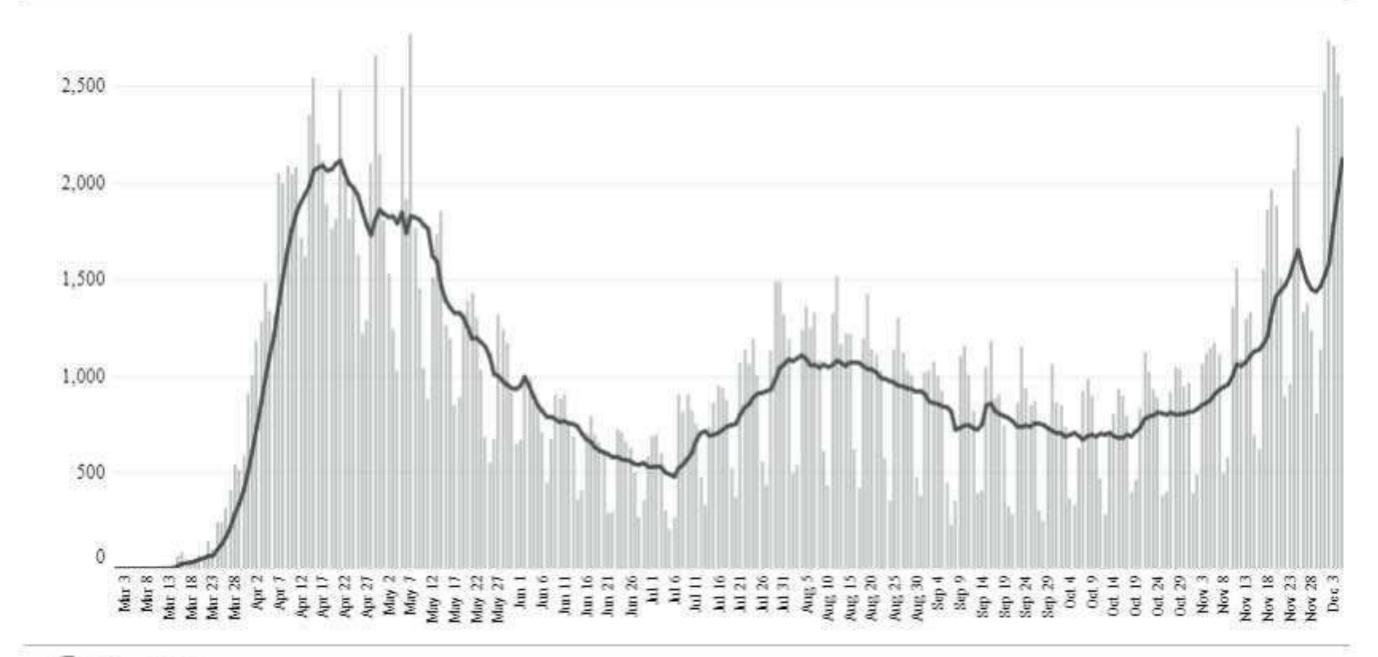
DestinationAnalysts.com/covid-webinars





#### US DAILY DEATHS. 7-DAY AVERAGE LINE







Coronavirus Cases:

15,150,070

Deaths:

288,878





#### California Covid-19 stay-at-home orders set to take effect Sunday night

By Dakin Andone, CNN - 50 mins ago







Tens of millions of people in Southern California, the San Joaquin Valley and the San Francisco Bay Area will find themselves under new stay-at-home orders this week in an effort to slow the spread of Covid-19 and prevent hospitals from being overrun.



© Jae C. Hong/AP Respiratory therapist Babu Paramban talks on the phone next to hospital beds while taking a break in the COVID-19 unit at Providence Holy Cross Medical Center in the Mission Hills section of Los Angeles, Thursday, Nov. 19, 2020. California is imposing an overnight curfew on most residents as the most populous state tries to head off a surge in coronavirus cases that it fears could tax its health care system, Gov. Gavin Newsom announced Thursday.(AP Photo/Jae C. Hong)

Roughly 33 million of California's 39 million residents, about 85% of the nation's most populous state, will be under the orders beginning Sunday evening.

Some 27 million people in the Southern California and San Joaquin Valley regions will be affected after both regions triggered a mandate issued by Gov. Gavin Newsom last week requiring new restrictions if a region's hospital intensive care unit capacity drops below

Almost 6 million will be under the orders after six Bay Area governments decided not to wait for ICU capacity to fall below that threshold.

As of Sunday, ICU capacity in Southern California, the state's most populous region, had fallen to 10.3%, according to the state's Covid-19 website. In the San Joaquin Valley region, encompassing much of central California, that metric dipped to 6.6%.

The state reported more than 30,000 new cases on Sunday, a record high for California.

The orders take effect Sunday at 11:59 p.m. PT and require the closure of businesses like bars, hair salons, museums, movie theaters and indoor recreational facilities. Retail businesses are allowed to stay open at 20% capacity, while restaurants are limited to takeout and delivery service. Travel is prohibited except for essential activities.

#### **Tipped Service Workers Are More Vulnerable Amid** Pandemic Harassment Spike: Study

by DEBBIE ELLIOTT, EMMA BOWMAN











Customers sit outside a restaurant offering outdoor service in New York in October. A new survey shows that tipped service workers are facing a marked increase in harassment during the coronavirus pandemic. Bebeto Matthews/AP

In the best of times, service industry workers are typically paid below the minimum wage and rely on tips to make up the difference. Now, those still working in an industry battered by the coronavirus pandemic are on the front lines, enforcing COVID-19 safety measures at the expense of both tip earnings and avoiding harassment.

A new report from One Fair Wage finds that more than 80% of workers are seeing a decline in tips and over 40% say they're facing an increase in sexual harassment from customers.

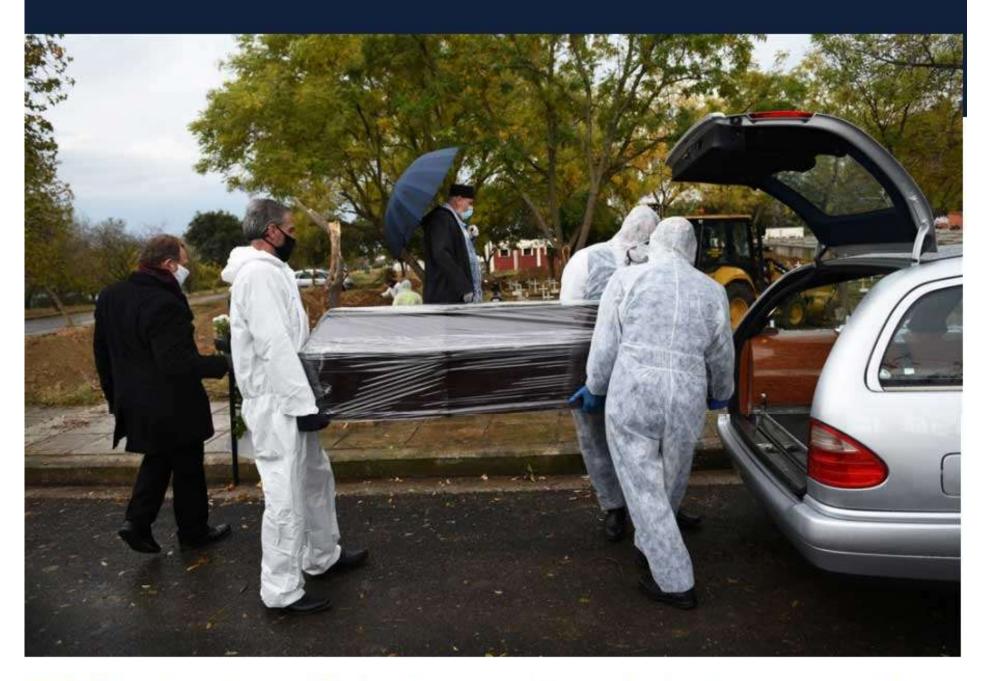
"We were really shocked with how horrific the situation truly is," Saru Jayaraman, president of One Fair Wage, said in an interview with Weekend Edition. "But I think the most horrific thing, that honestly all of us who are involved in the study were all blown away by, was the huge increase in hostility and sexual harassment."





#### Live Blog / Dec. 4 Coronavirus updates: Pelosi offers optimism for deadlocked relief deal

Amid the latest Covid surge, California Gov. Gavin Newsom introduced a new stay-at-home order. Meanwhile, the first coronavirus vaccines could reach the public as early as next week.



—— Pallbearers in personal protective equipment carry the coffin of a patient who died from Covid-19 in Thessaloniki, Greece, on Friday. Alexandros Avramidis / Reuters

Updated Dec. 4, 2020, 11:07 PM PST

The U.S. neared its record on Thursday for coronavirus-related deaths when more than 2,800 people were confirmed dead from Covid-19, according to an NBC News tally. There is light at the end of the tunnel, however. A panel of the Centers for Disease Control and Prevention this week announced its guidelines for the first phase of the most ambitious national vaccination campaign in modern history.



THE CORONAVIRUS CRISIS

#### CDC Adviser On COVID-19 Vaccine Priority Groups And Why Some Aren't Eager To Be First

December 2, 2020 - 7:03 PM ET Heard on All Things Considered









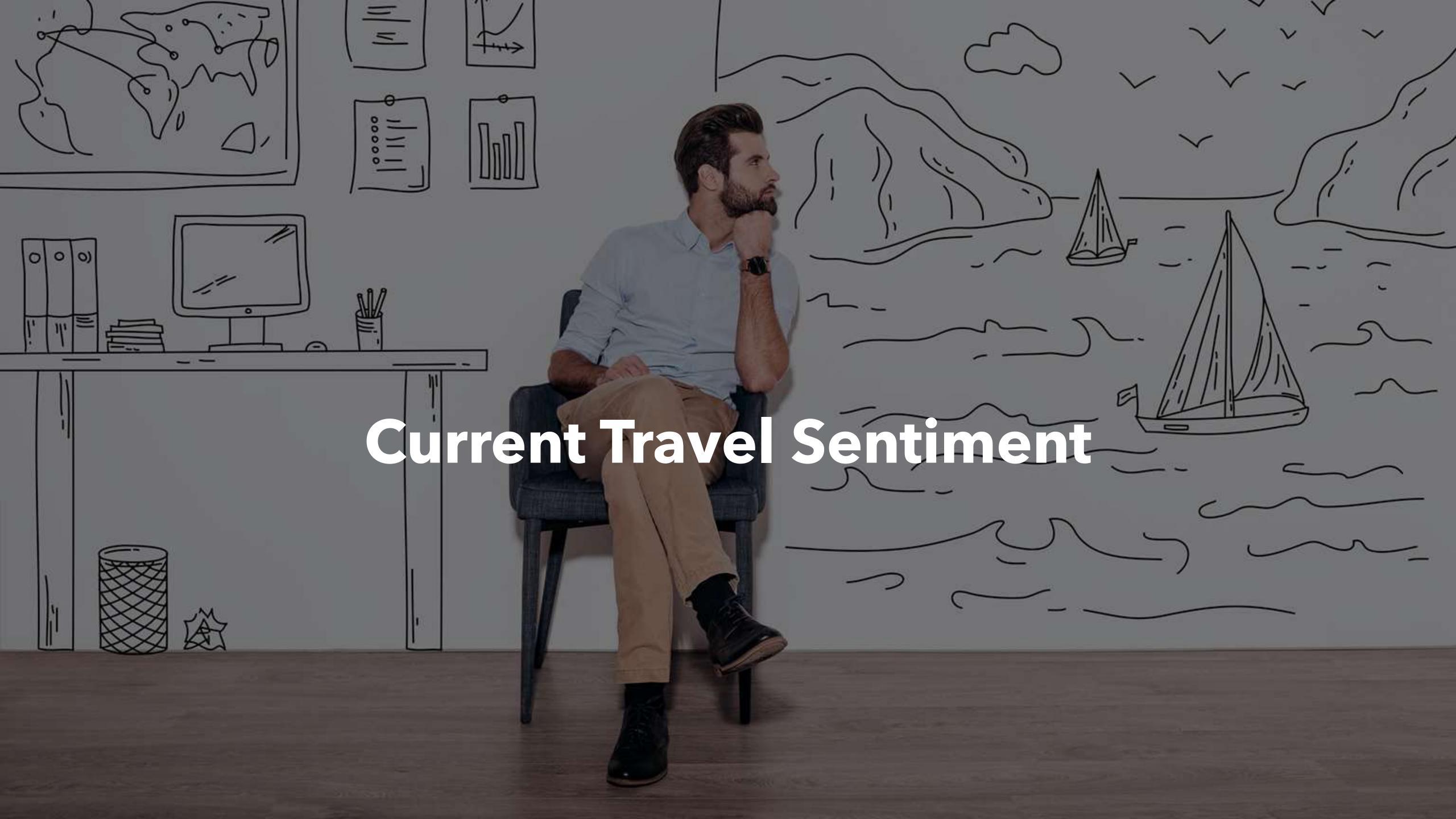


For those fighting the COVID-19 pandemic — and those hit hardest by it — a vaccine could be just weeks away, as the Food and Drug Administration weighs emergency approval for two vaccines. On Tuesday, a Centers for Disease Control and Prevention advisory panel recommended that the first vaccines should go to health care workers and residents and staff of long-term care facilities.

The companies behind the two vaccines, Pfizer and Moderna, say their vaccines have been shown to be 95% and 94% effective, respectively. But some people who could be at the front of the line aren't eager to go first, says Dr. Robert Atmar, a professor at Baylor College of Medicine in Houston and a member of the Advisory Committee on Immunization Practices that made the recommendations.

"We're hearing a lot of hesitation among health care personnel, and I think a lot of it has to do with the politicized nature of the vaccine development and the whole response to the pandemic," says Atmar, who also works in the Harris County hospital system in Texas.

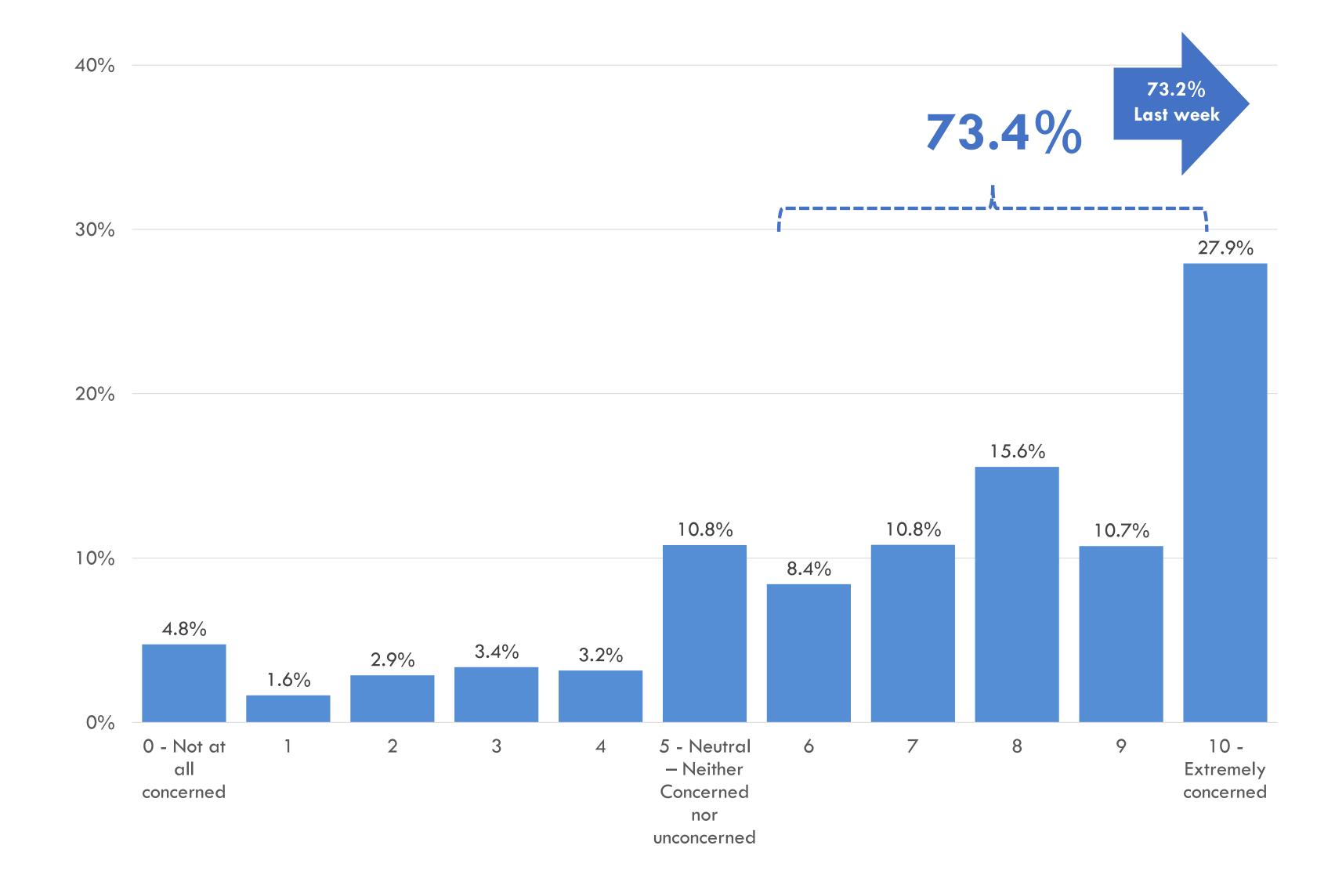
"We're beginning to roll out education to our staff to explain exactly what the process has been and to reassure that there weren't any steps that were skipped" in the compressed testing and approval timeline, he tells All Things Considered.



# 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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)

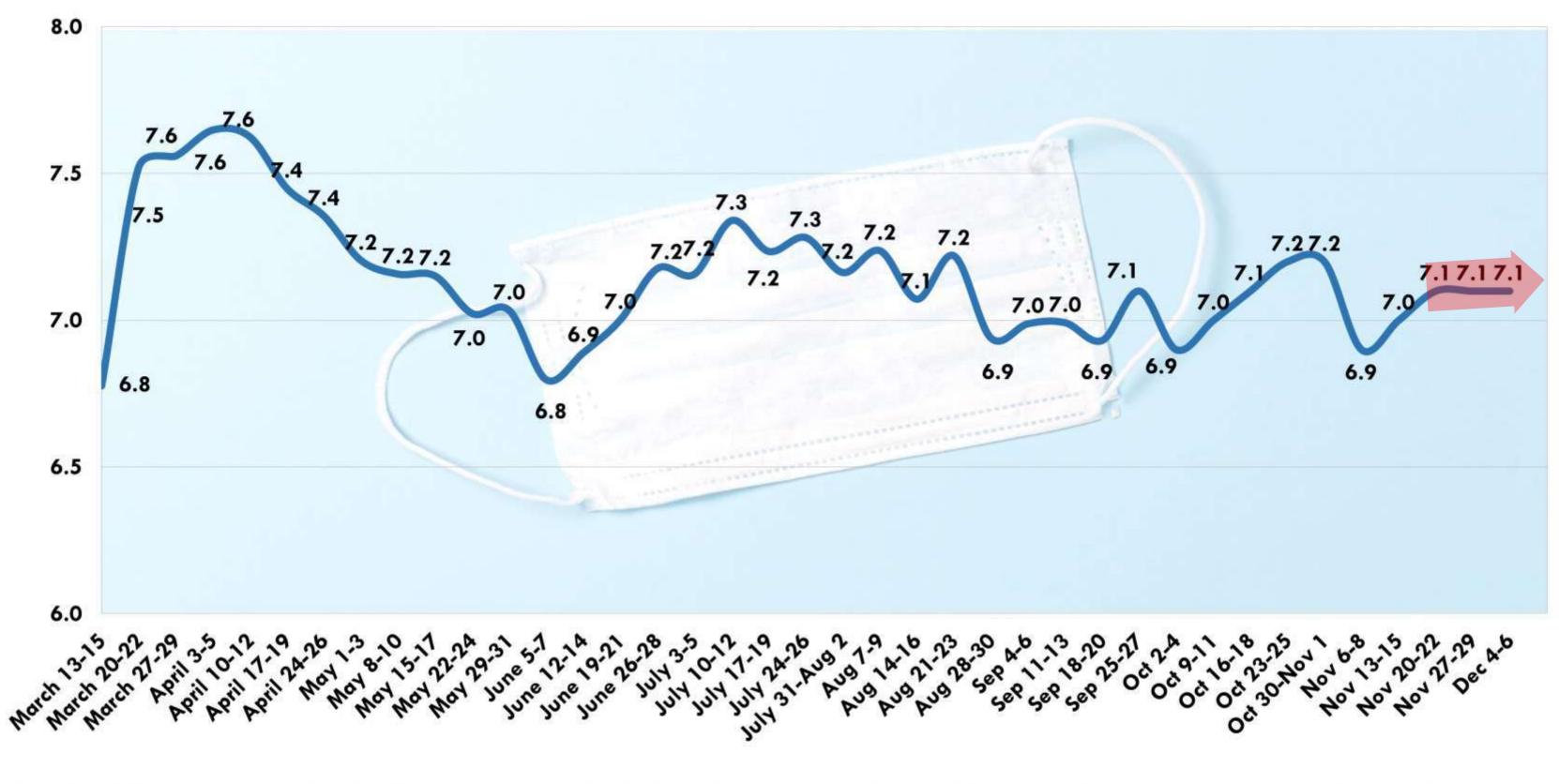




### HEALTH CONCERNS (FAMILY & FRIENDS)

#### MARCH 13 - DECEMBER 6





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

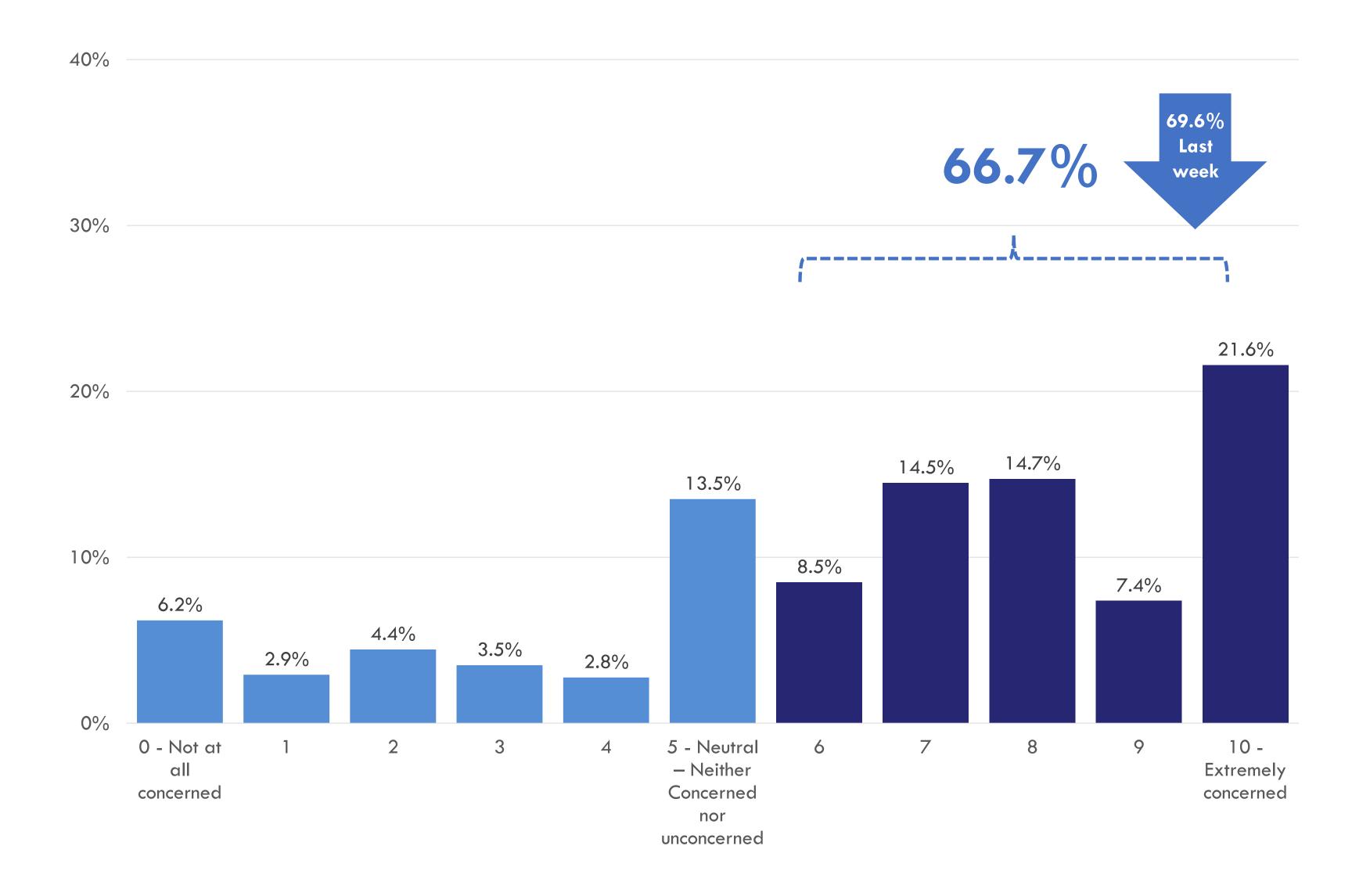
(Base: Waves 1-39. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205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



# 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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



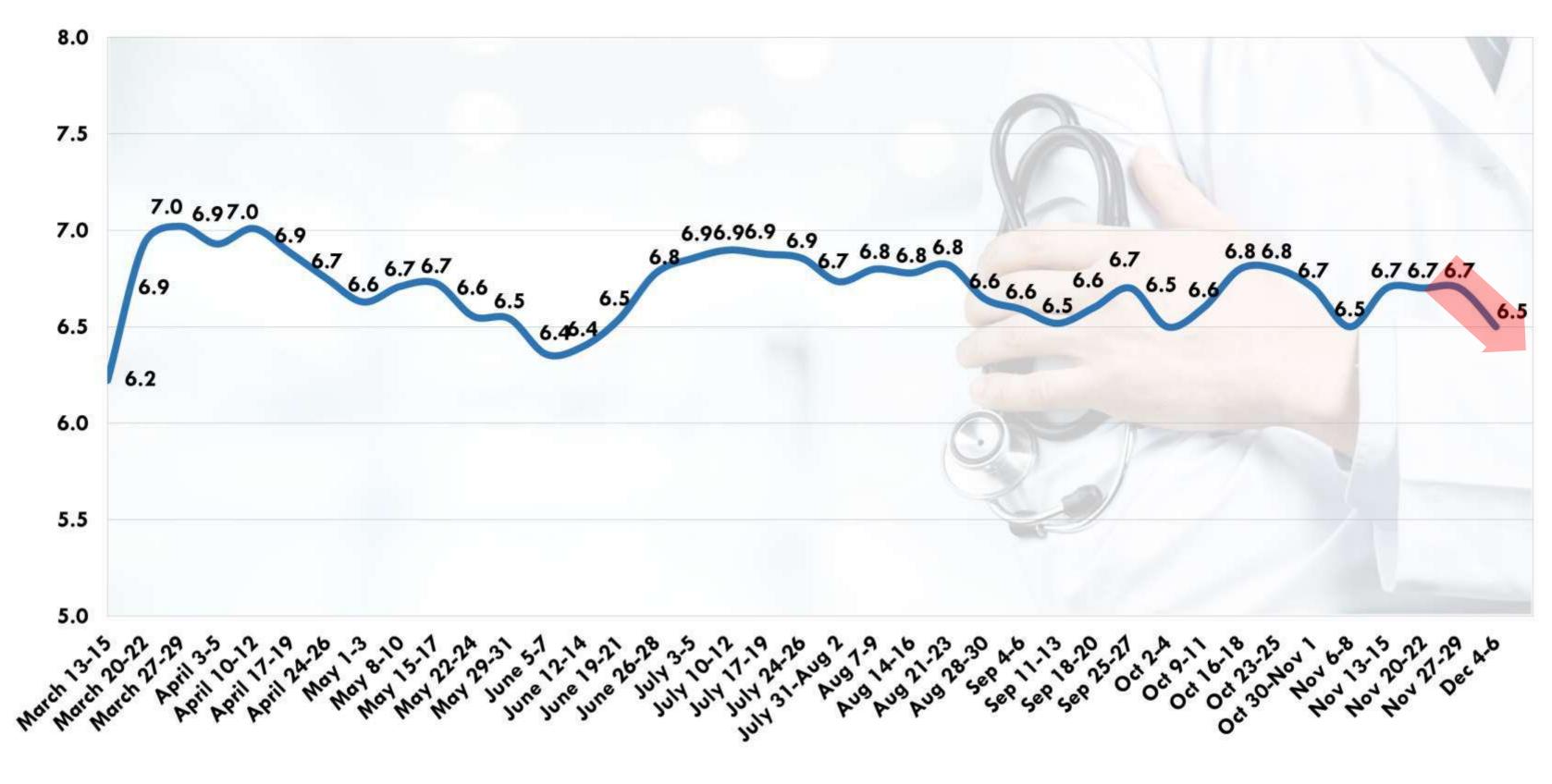


#### PERSONAL HEALTH CONCERNS

#### MARCH 13 - DECEMBER 6



#### 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?

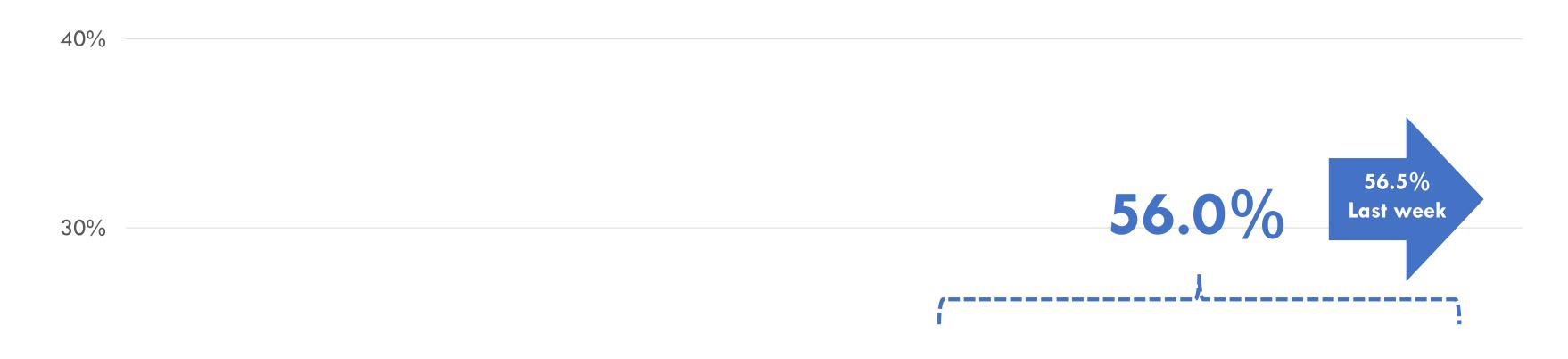
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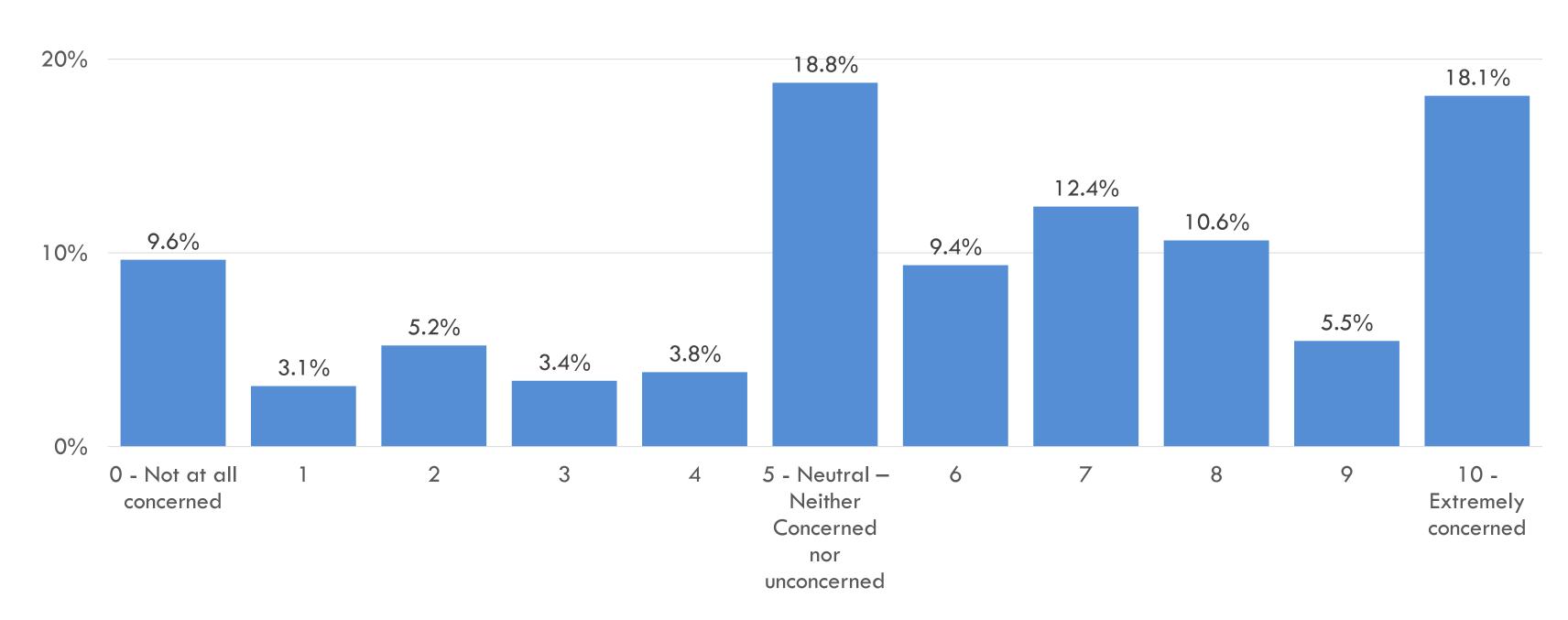


# CONCERNS ABOUT PERSONAL FINANCES

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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)





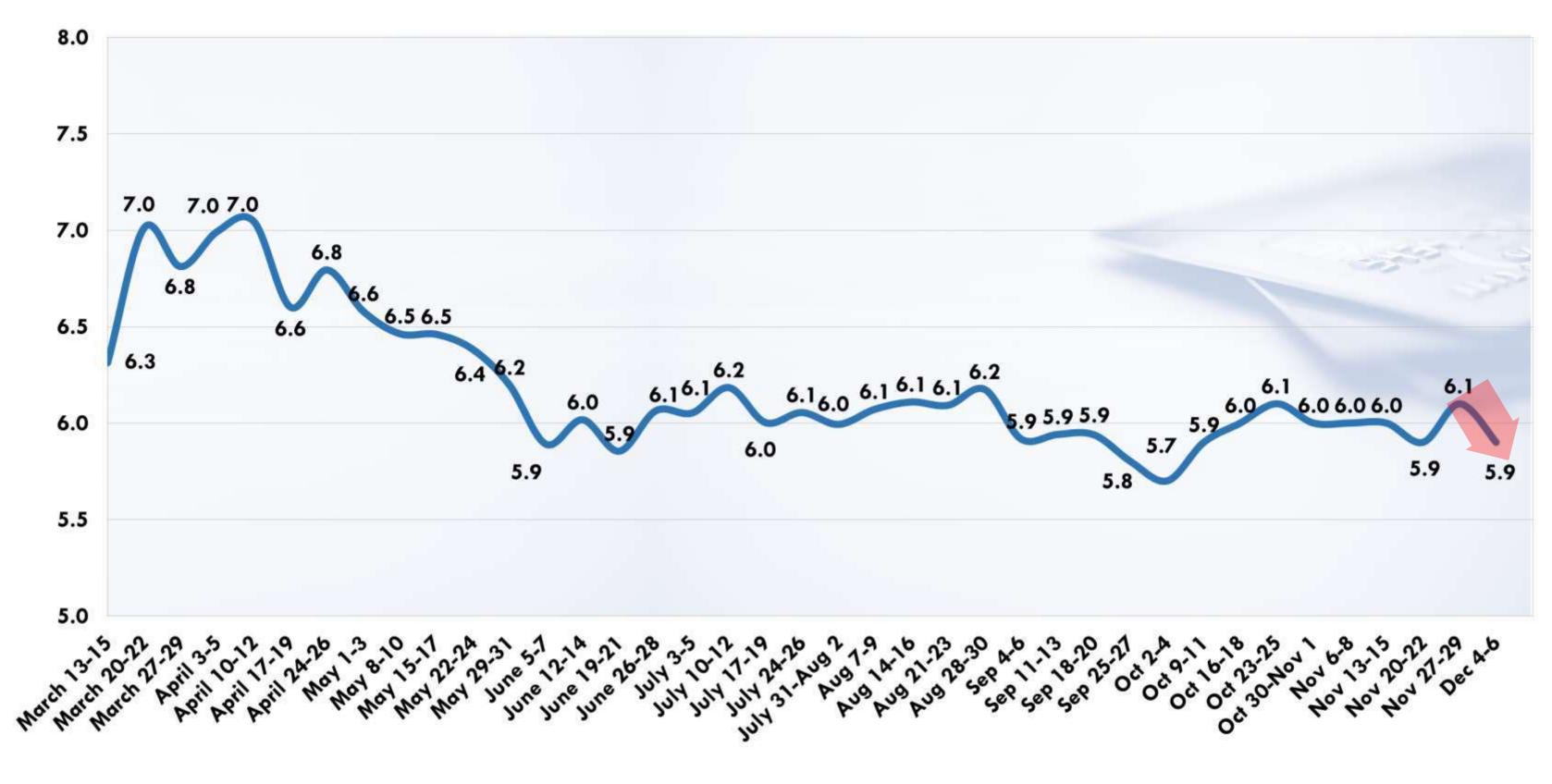


#### CONCERNS ABOUT PERSONAL FINANCES

#### MARCH 13 - DECEMBER 6



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?

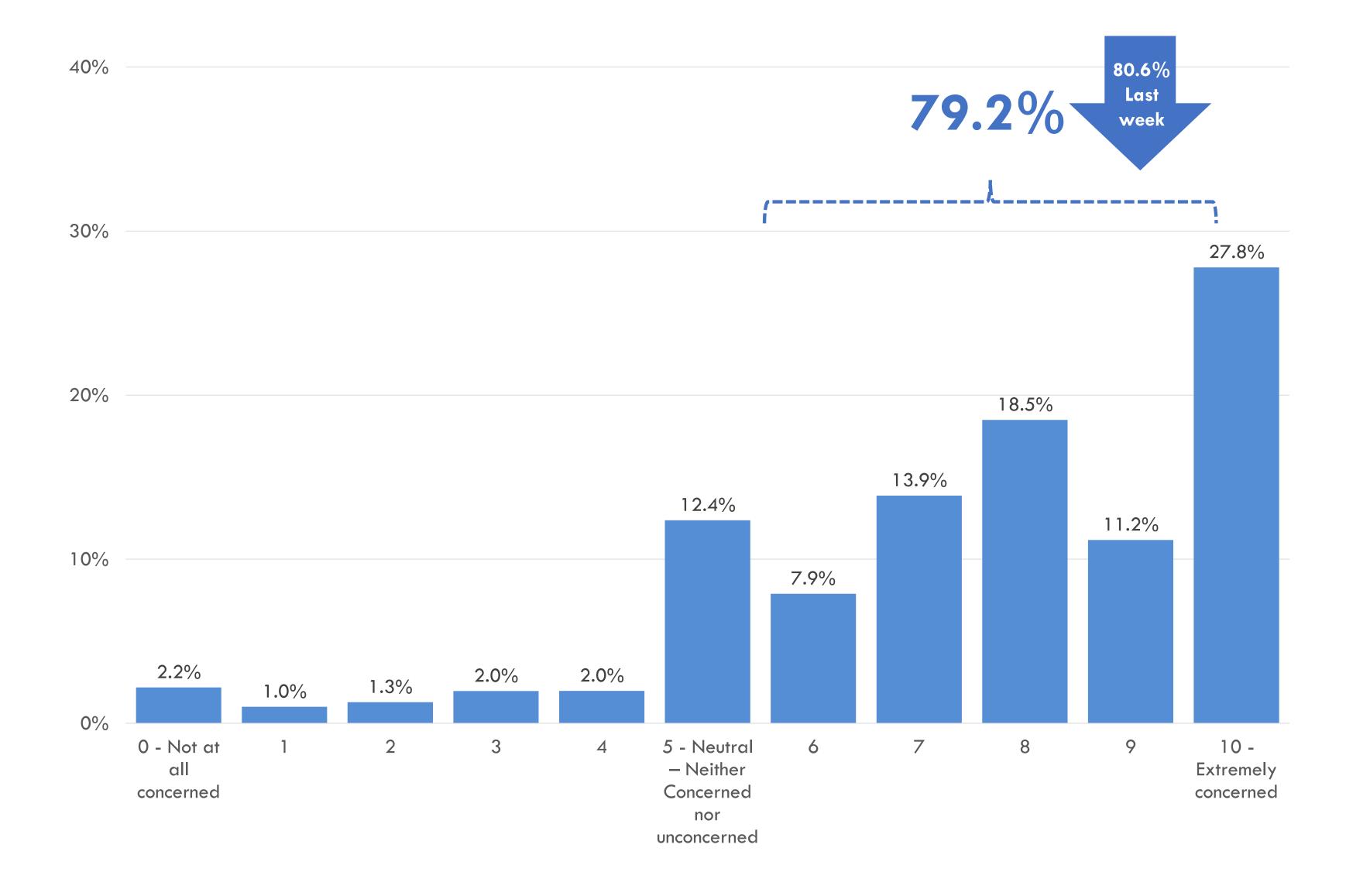
(Base: Waves 1-39. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205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



# 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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



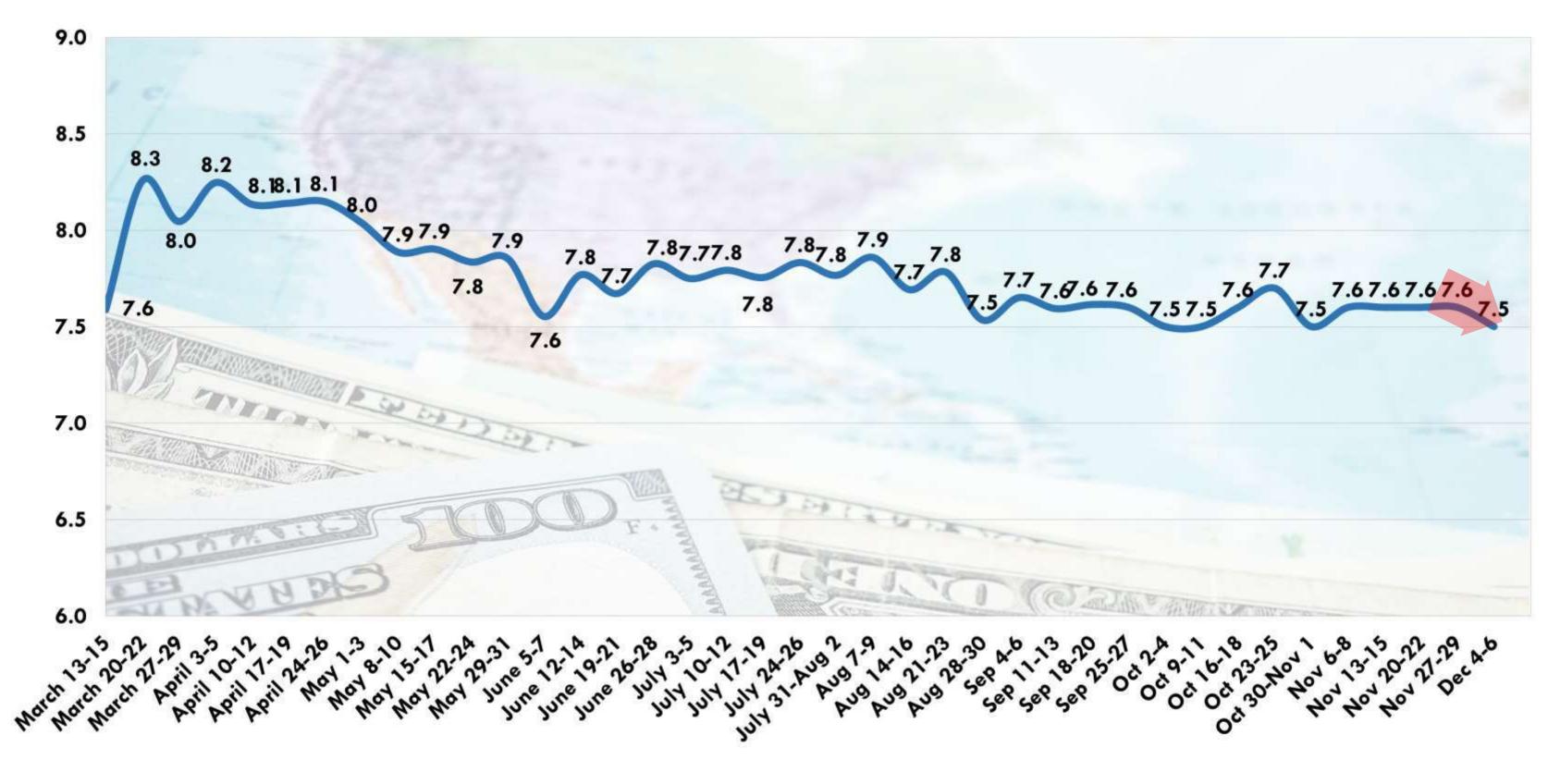


#### CONCERNS ABOUT NATIONAL ECONOMY

#### MARCH 13 - DECEMBER 6



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

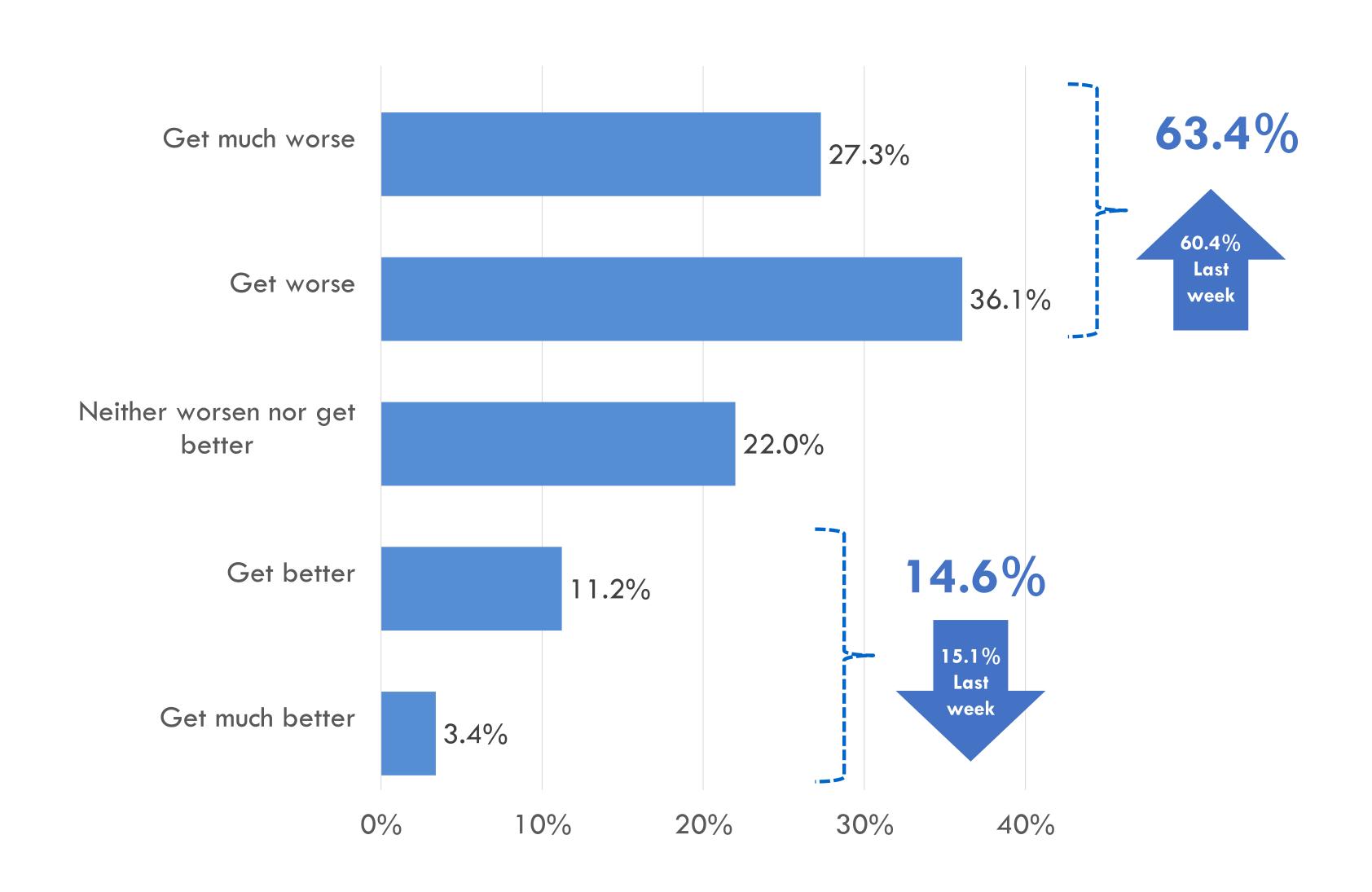


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



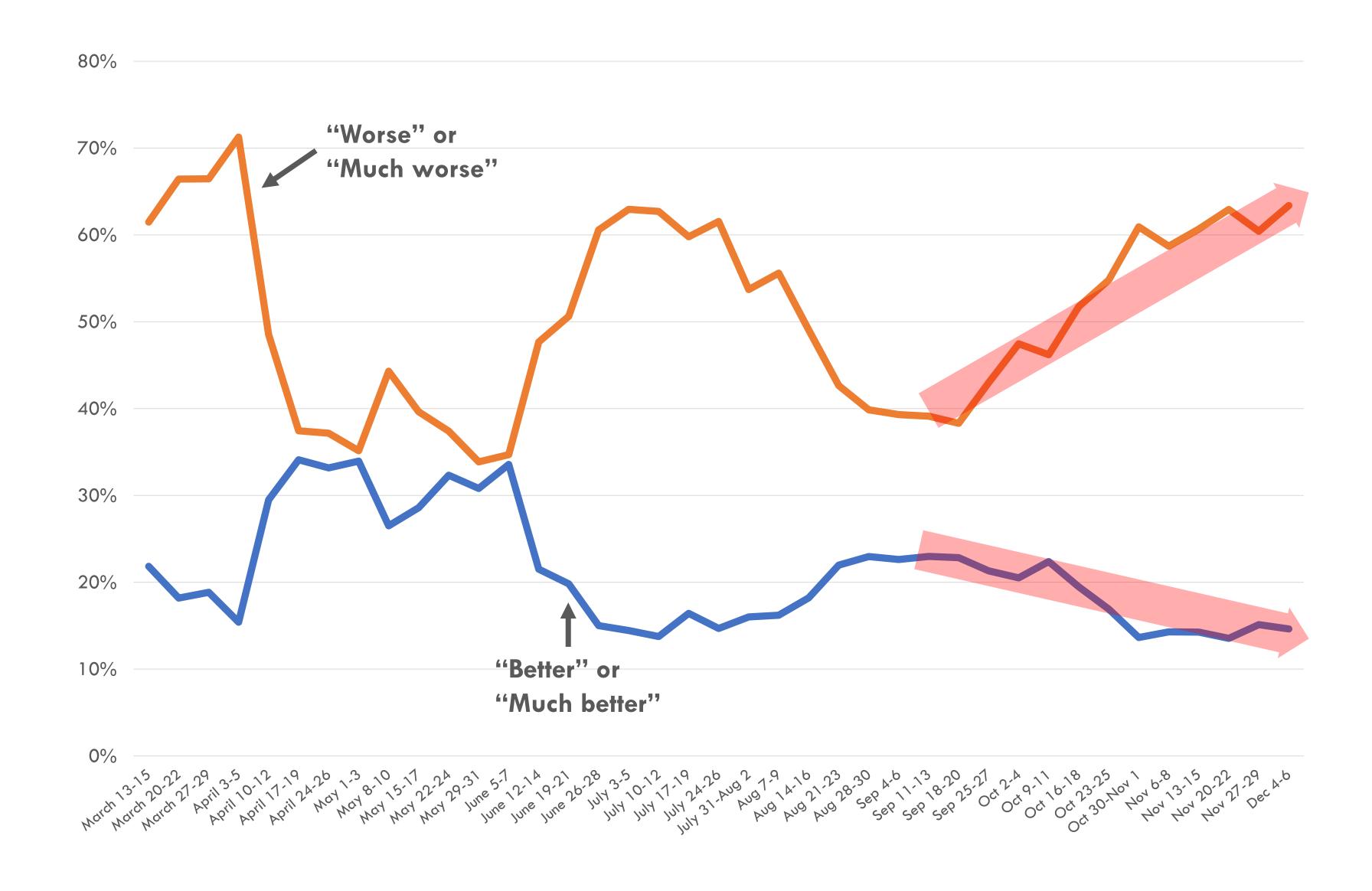


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-39)

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

In the next month the coronavirus situation will

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

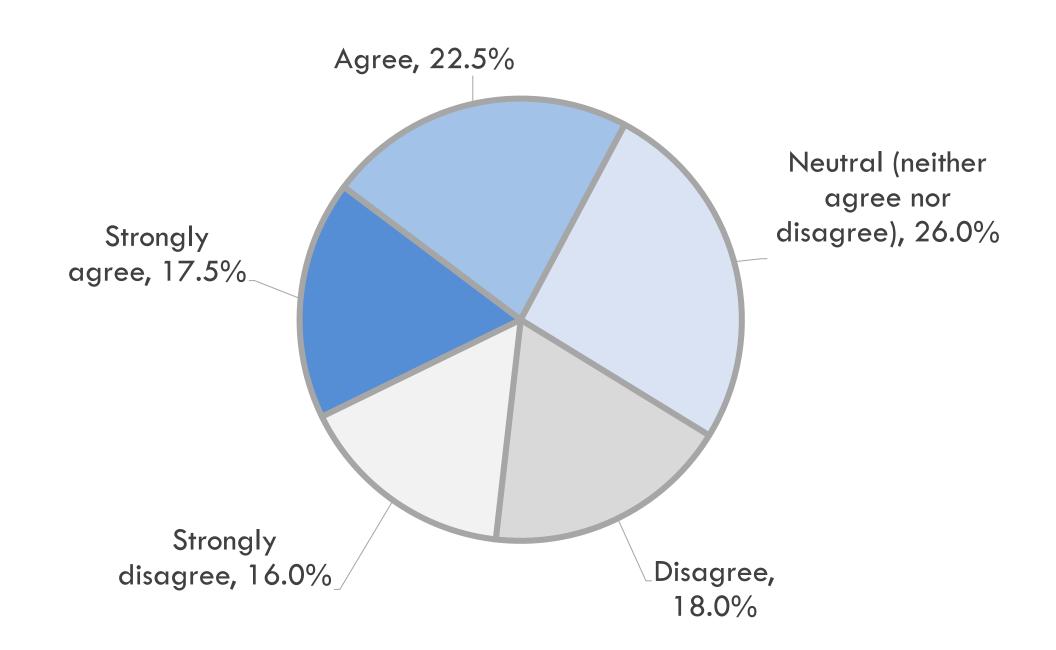




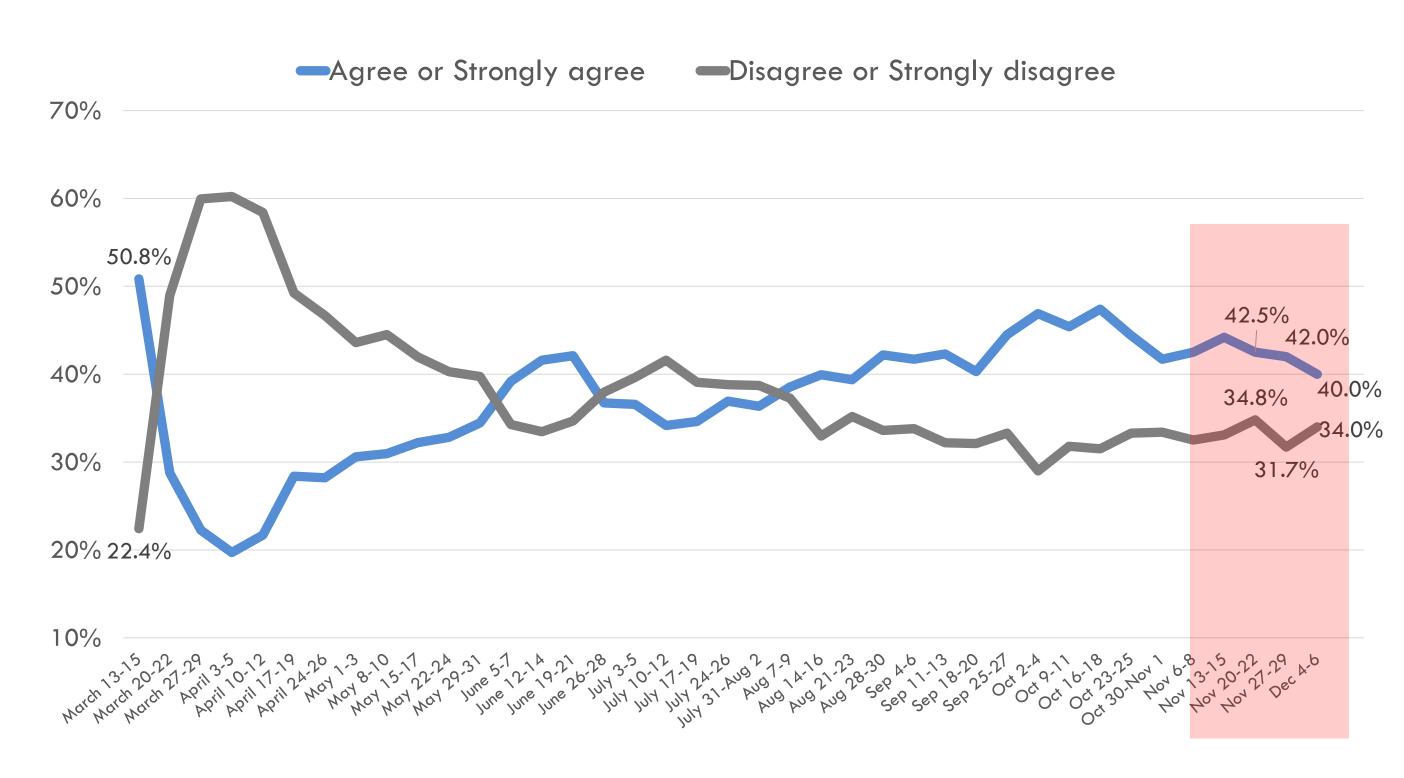
# COMFORT ENJOYING HOME COMMUNITY

#### How much do you agree with the following statement?

Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.



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



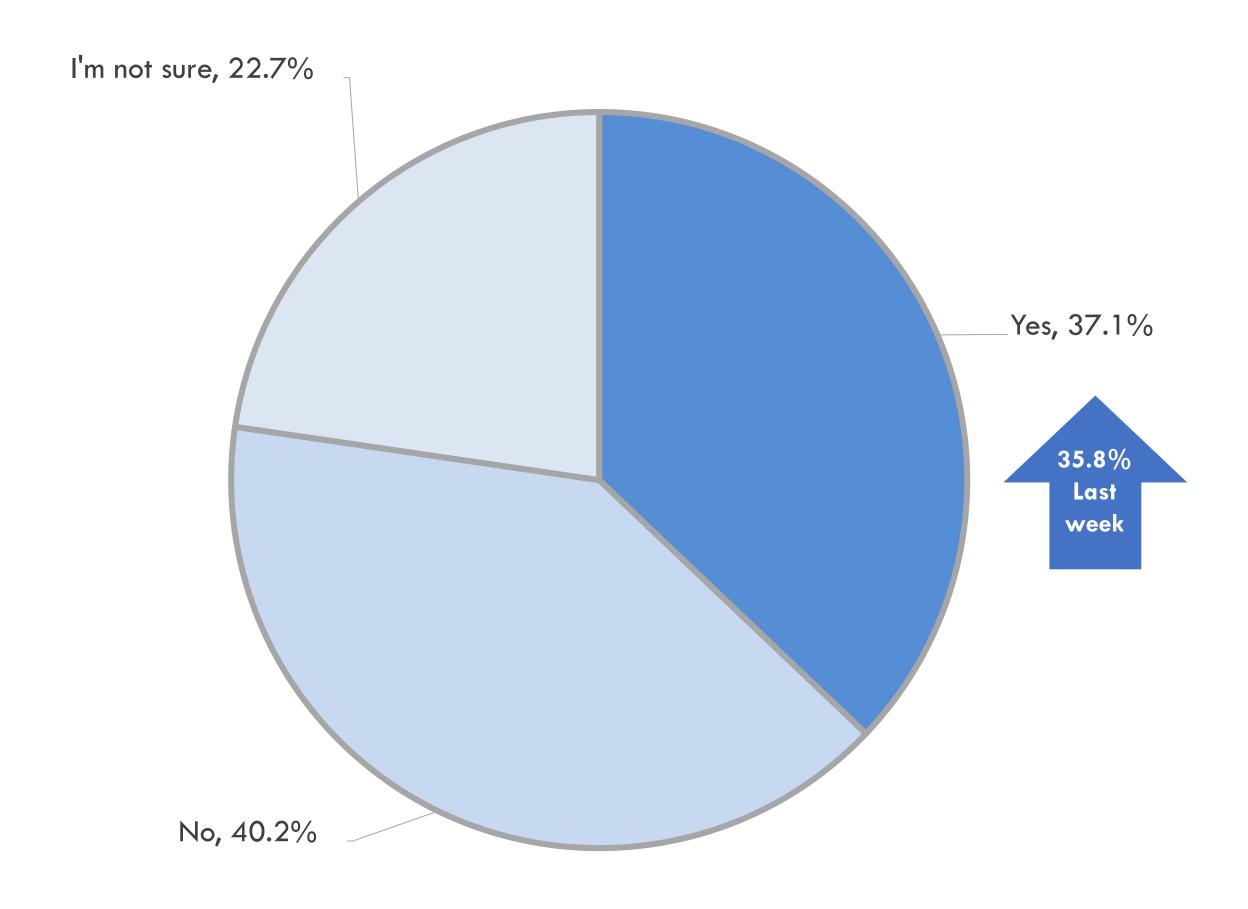


# COVID-19 RELATED DESTINATION MEDIA COVERAGE

Question: Please think now about COVID-19 related reports you have recently seen in the media (newspapers, magazines, television, the Internet, etc.).

In the PAST MONTH, do you recall seeing any COVID-19 related reports in the media about travel destinations where people were behaving in a manner that would MAKE YOU FEEL UNCOMFORTABLE VISITING?

(Base: Wave 39 data. All respondents, 1,204 completed surveys.)



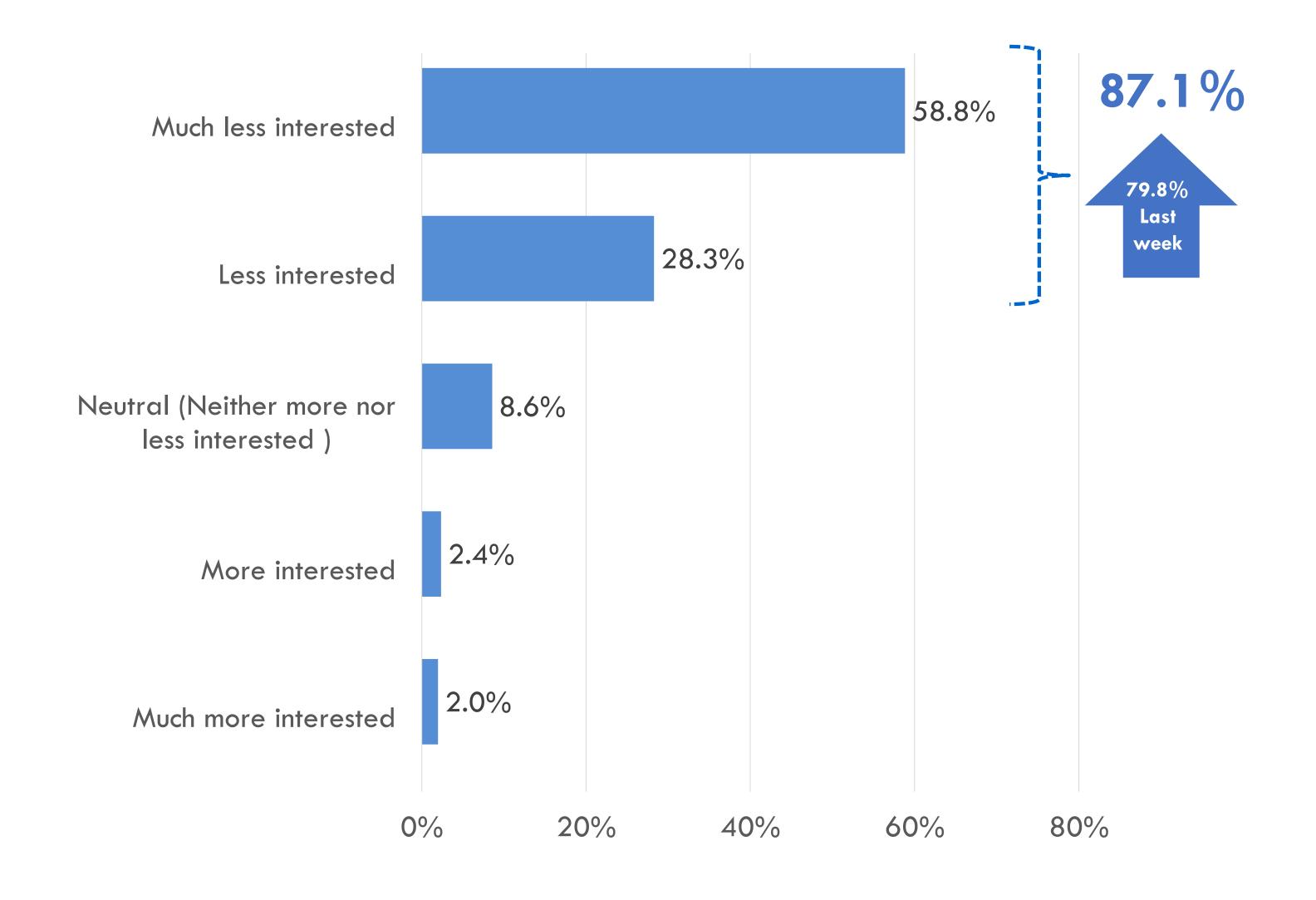


# EFFECTS OF COVID-19 MEDIA COVERAGE ON DESTINATIONS

Question: How does this media coverage make you feel about visiting these destinations in the NEXT SIX (6) MONTHS? (Select one to complete the sentence)

Because of the way people are behaving, I am \_\_\_\_\_ in visiting.

(Base: Wave 39 data. Respondents who recall COVID-19 related reports in the media about travel destinations, 475 completed surveys. Data collected Dec 4-6, 2020)





# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 39)

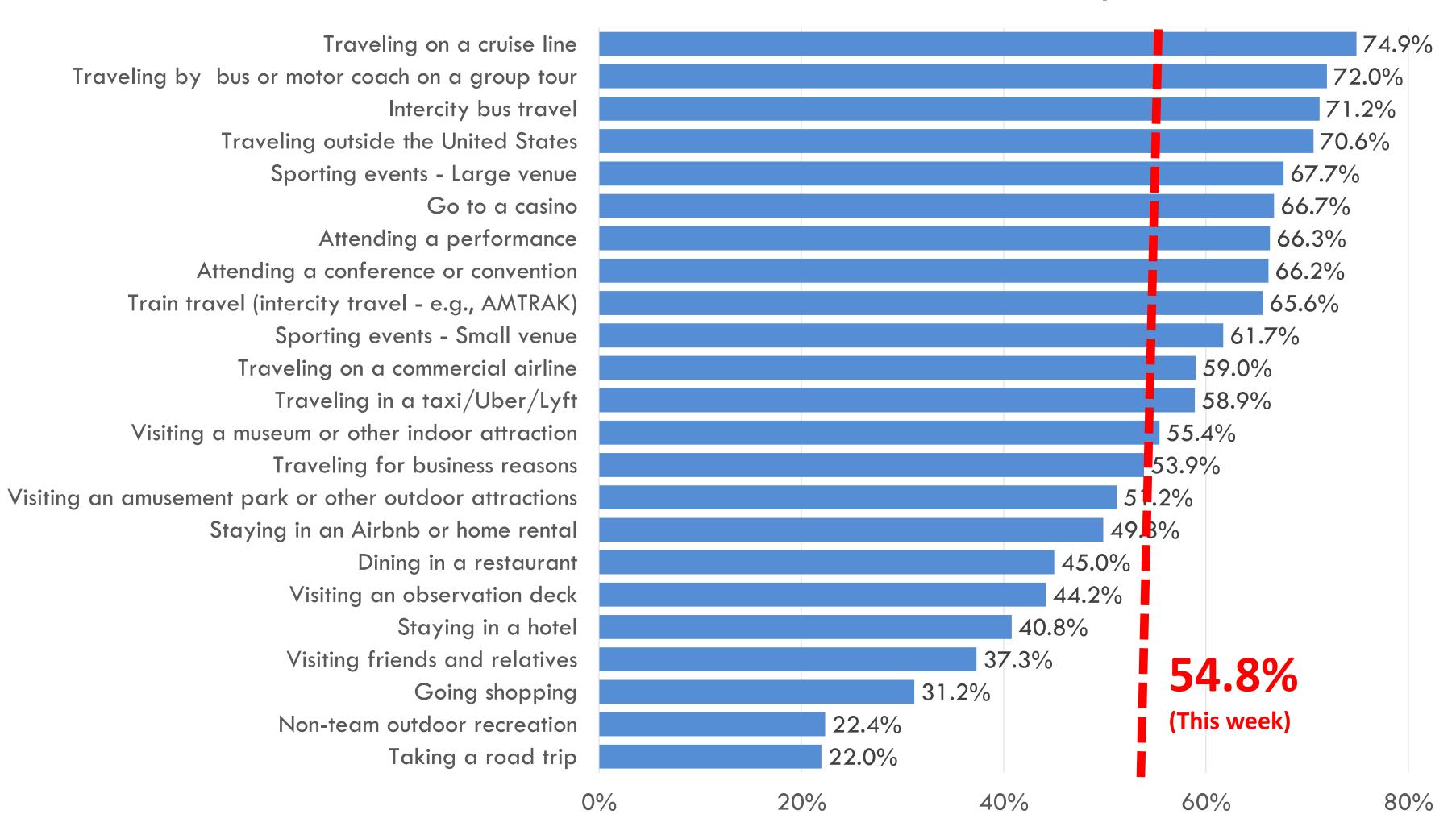
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.

Data collected Dec 4-6, 2020)

# Top 2-Box Score: Percent Selecting Each as "Somewhat Unsafe" or "Very Unsafe"

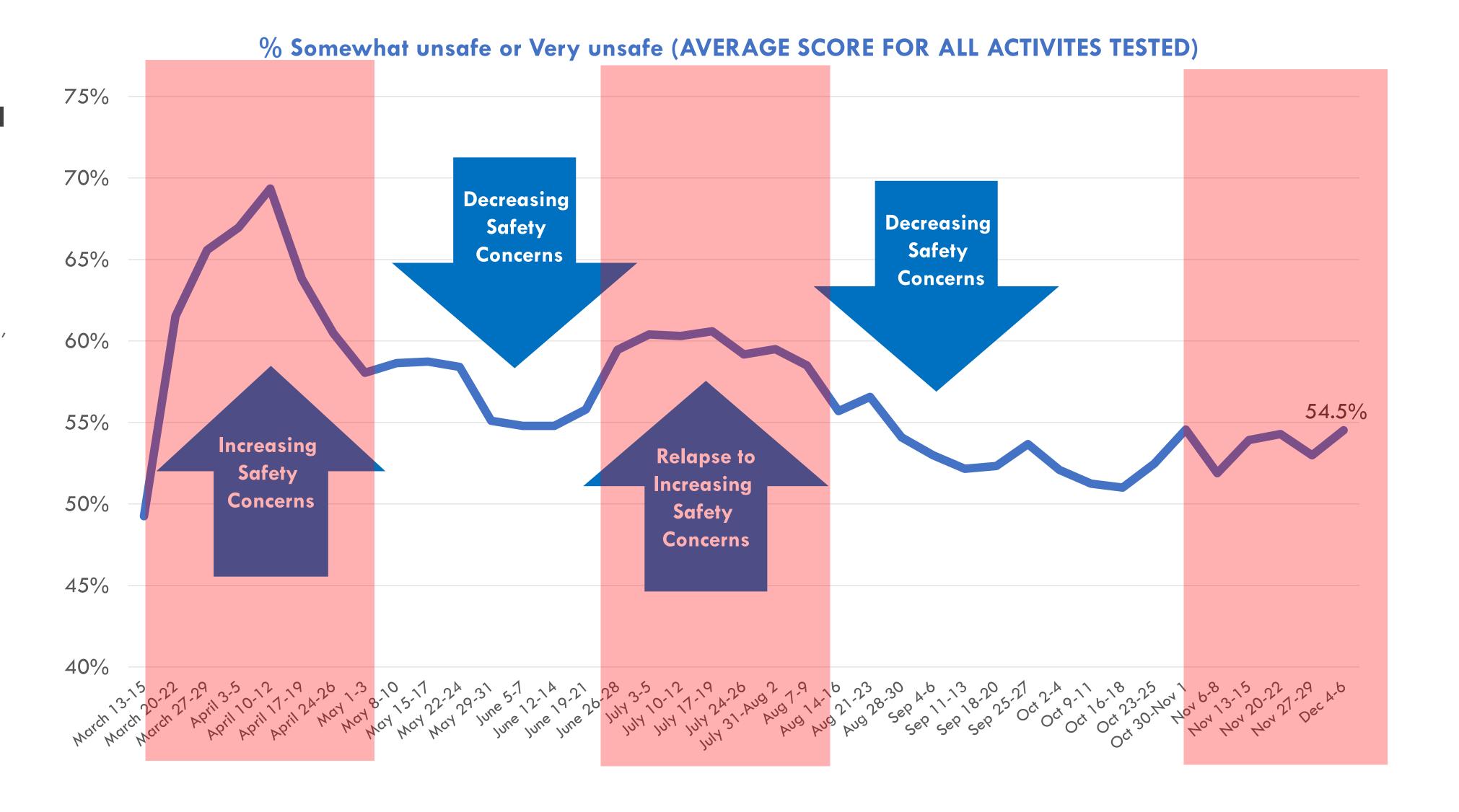




# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-39 COMPARISON)

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

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





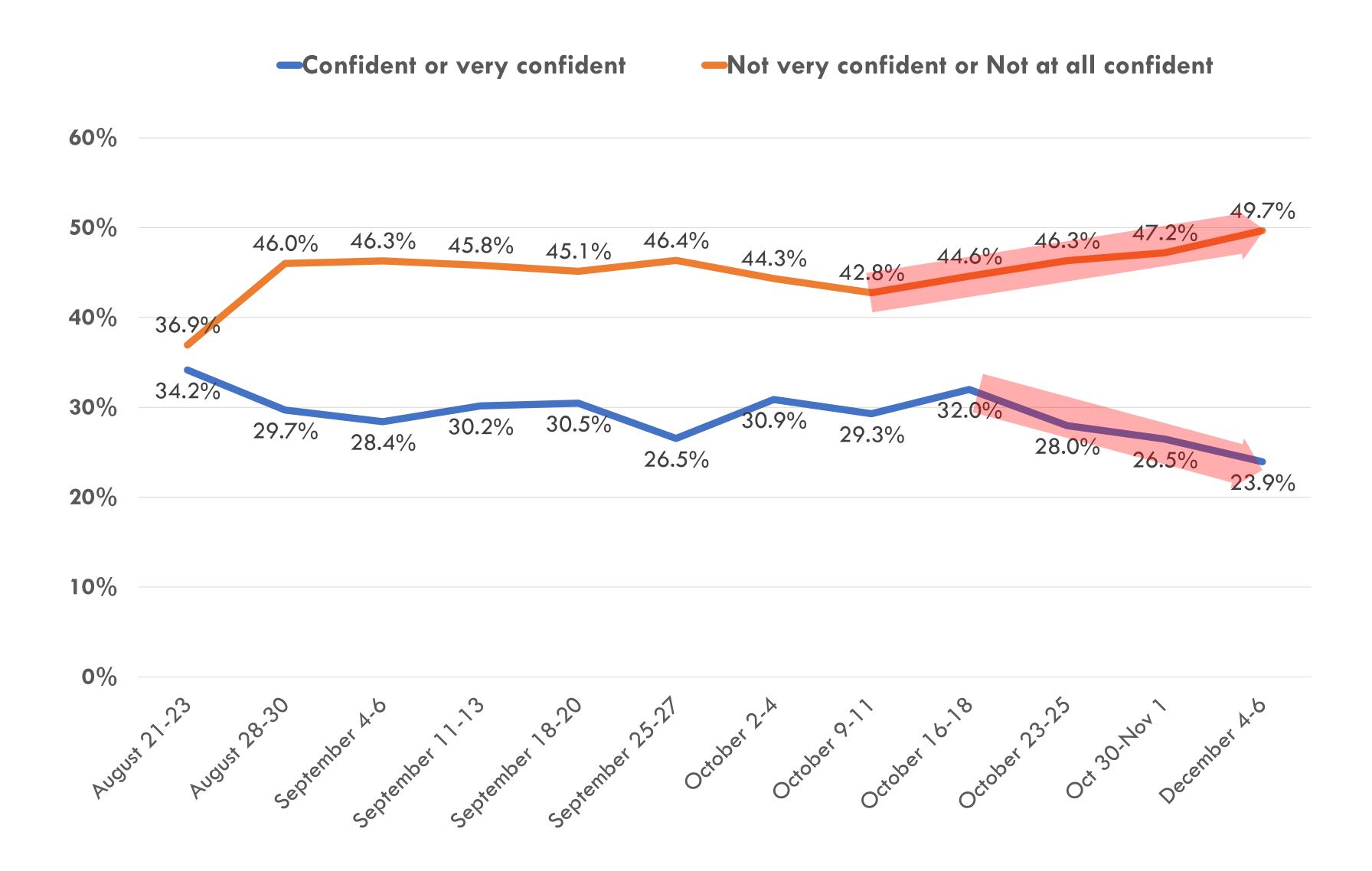
# CONFIDENCE IN TRAVELING SAFELY

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

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.

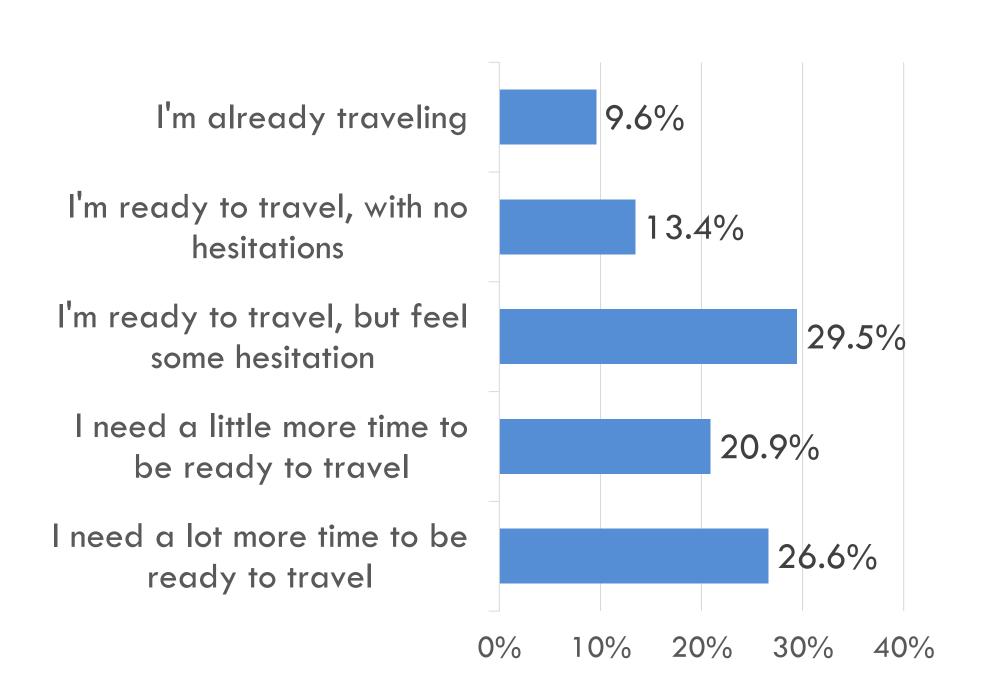
Data collected December 4-6, 2020)



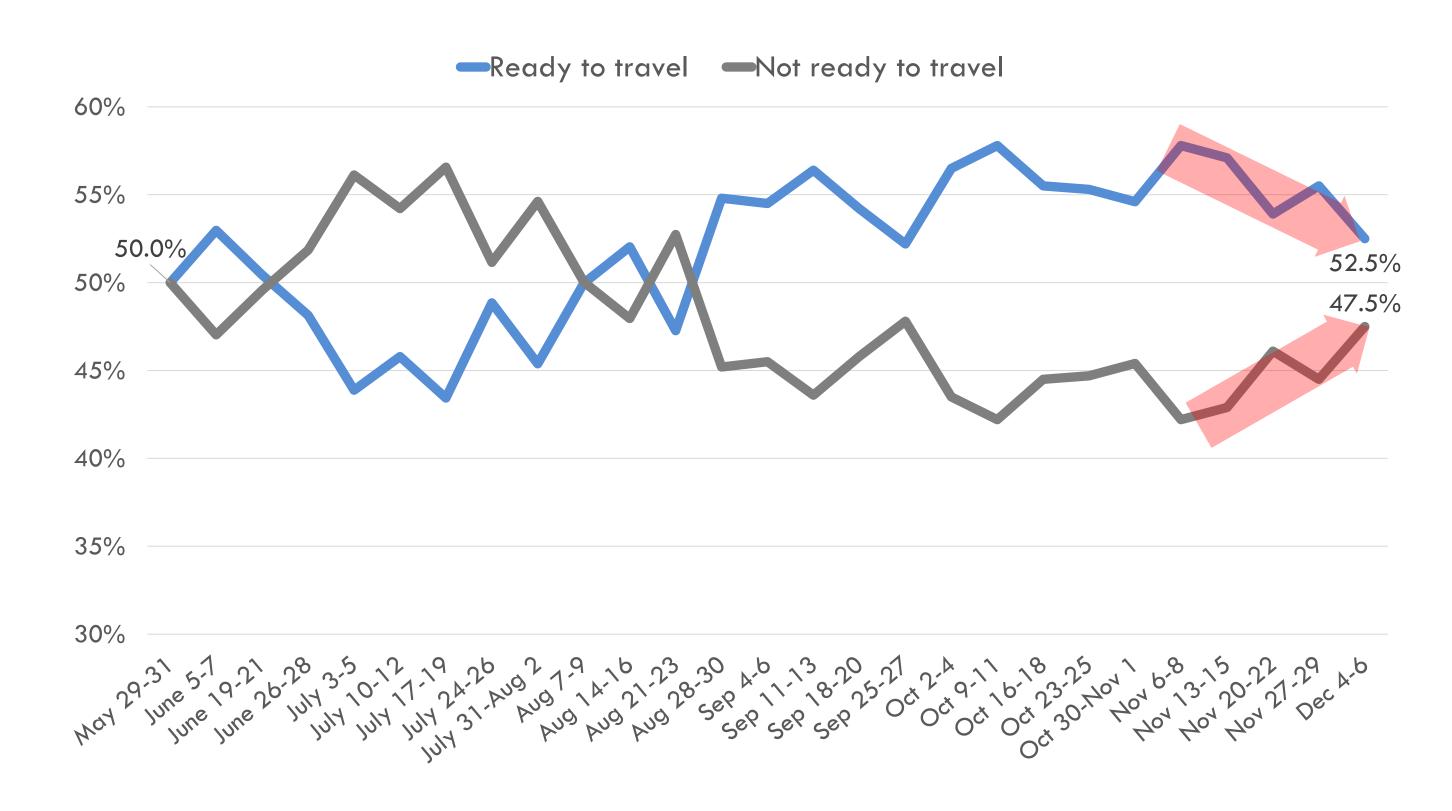


# TRAVEL STATE-OF-MIND

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 15-39. 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 and 1,204 completed surveys.)

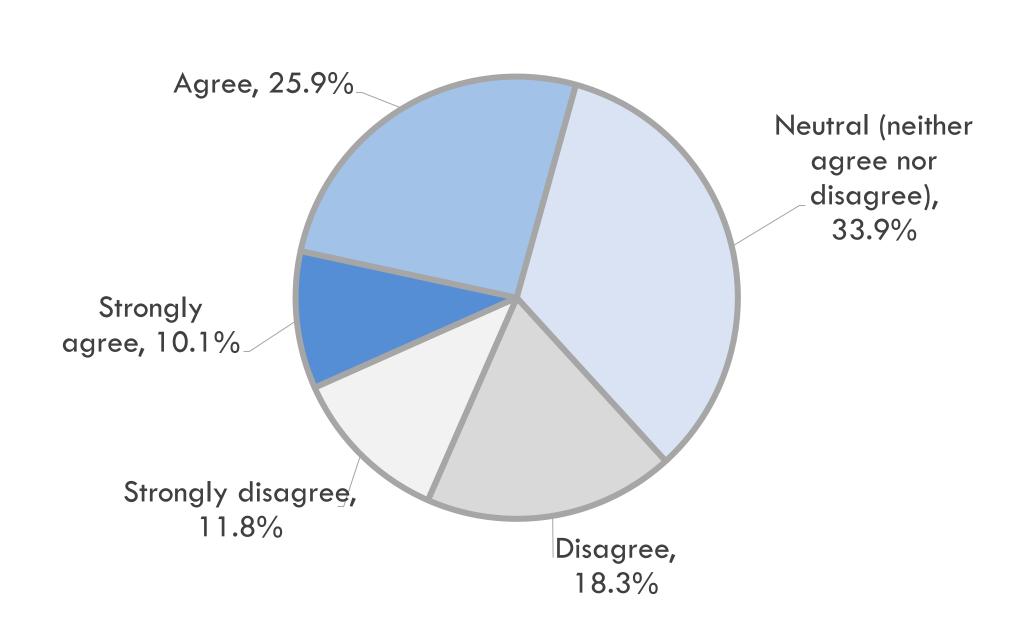




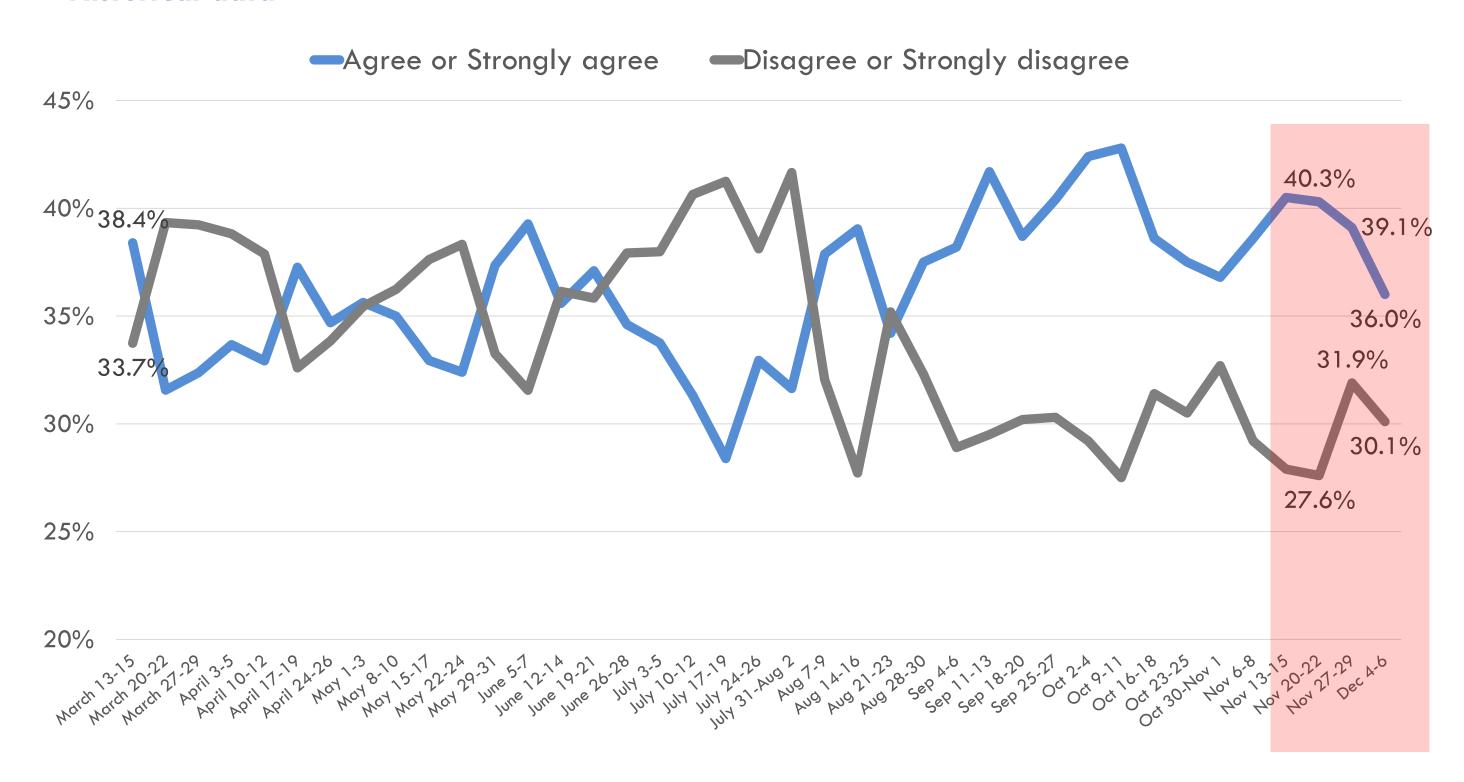
# DISCOUNTS AND PRICE CUTS

#### How much do you agree with the following statement?

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



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

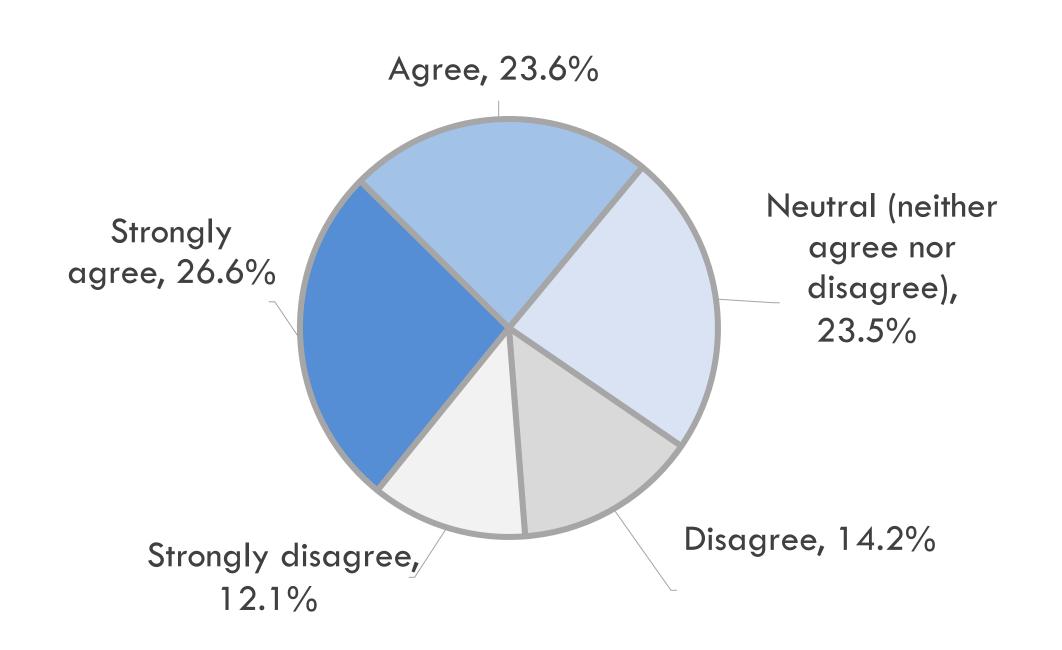




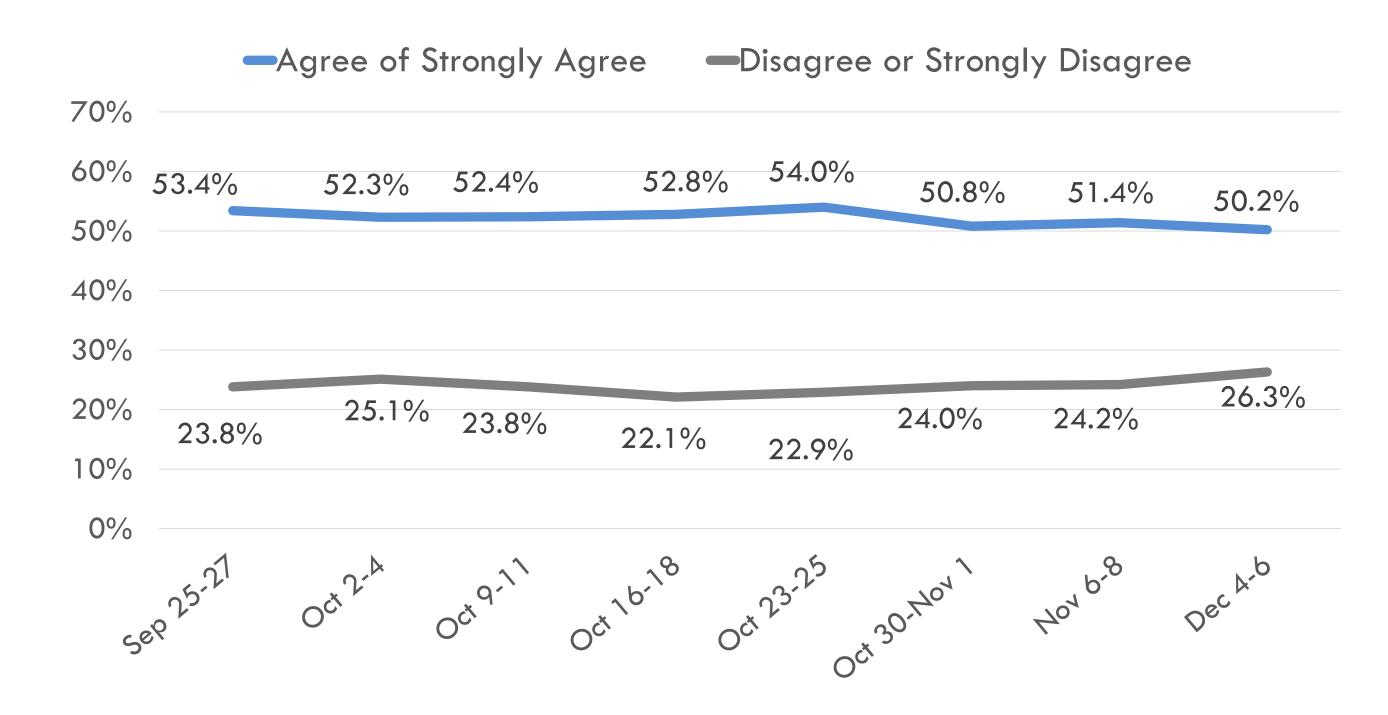
# TRAVEL AS AN ESSENTIAL NEED ONLY

#### How much do you agree with the following statement?

Statement: Due to the Coronavirus situation, I believe travel should be limited to essential needs only.



(Base: Waves 29-35 and 39 data. All respondents, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205 and 1,204 completed surveys.)

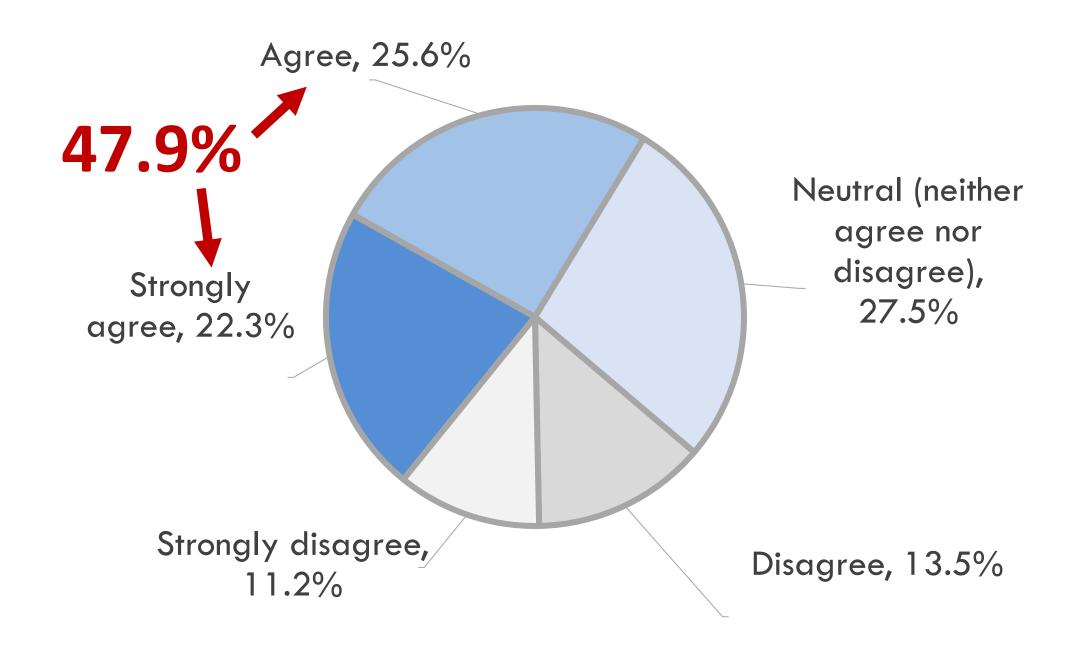




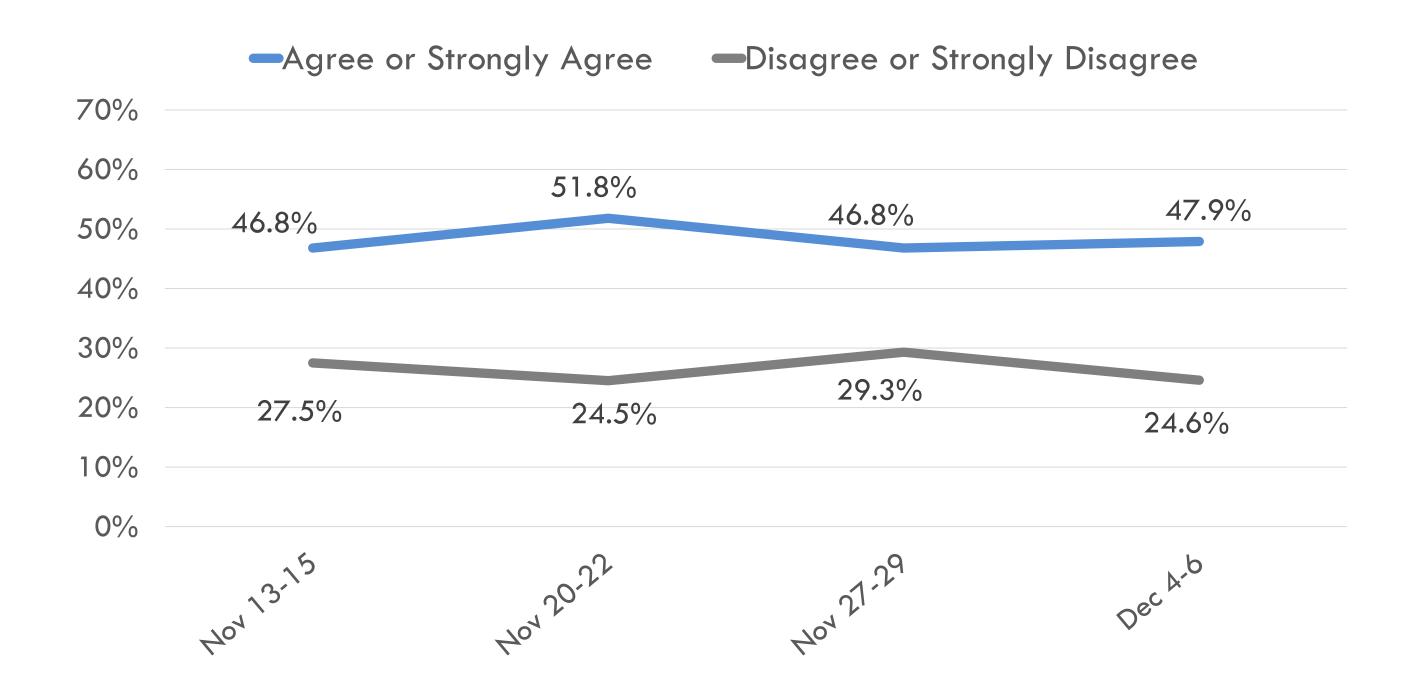
# TRAVEL GUILT

#### How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



(Base: Waves 36-39 data. All respondents, 1,206, 1,205, 1,205 and 1,204 completed surveys.)



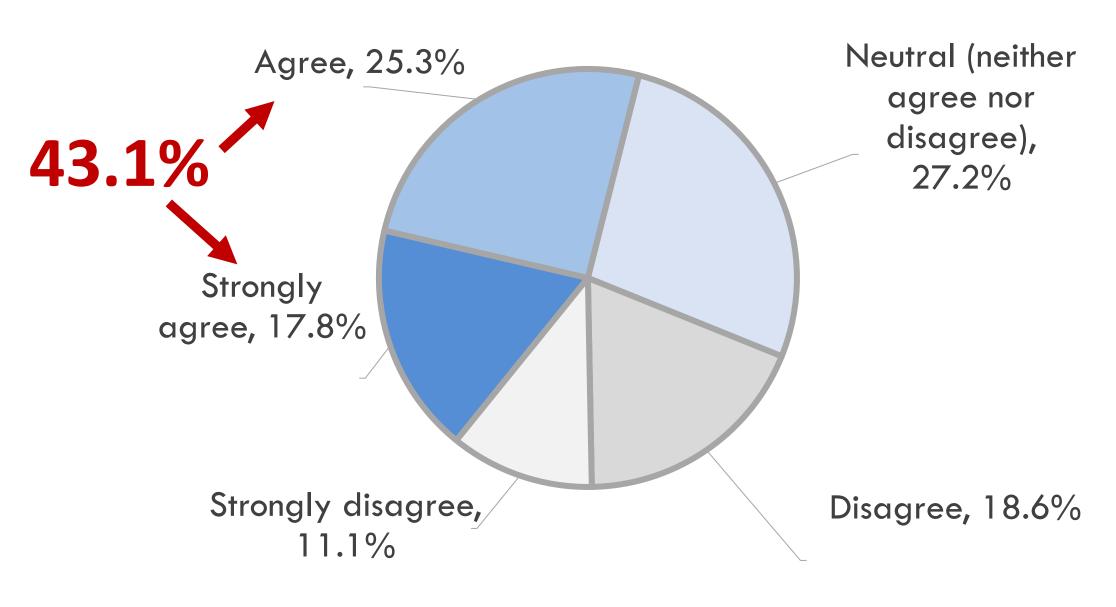




# LOSS OF INTEREST IN TRAVEL

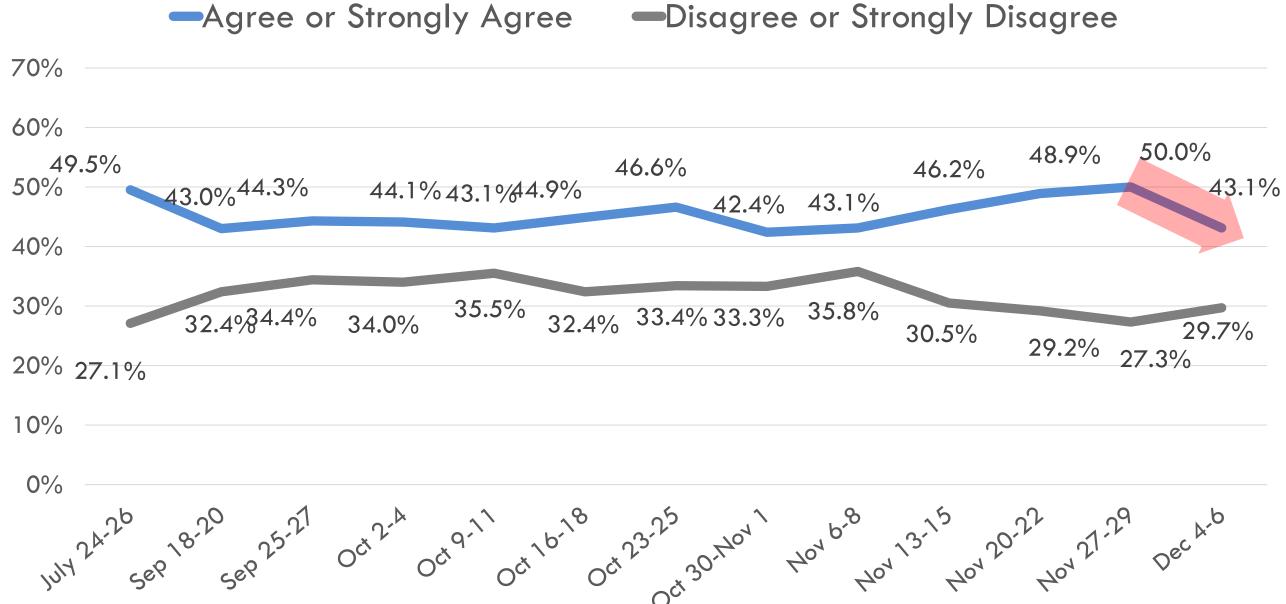
#### How much do you agree with the following statement?

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



70%





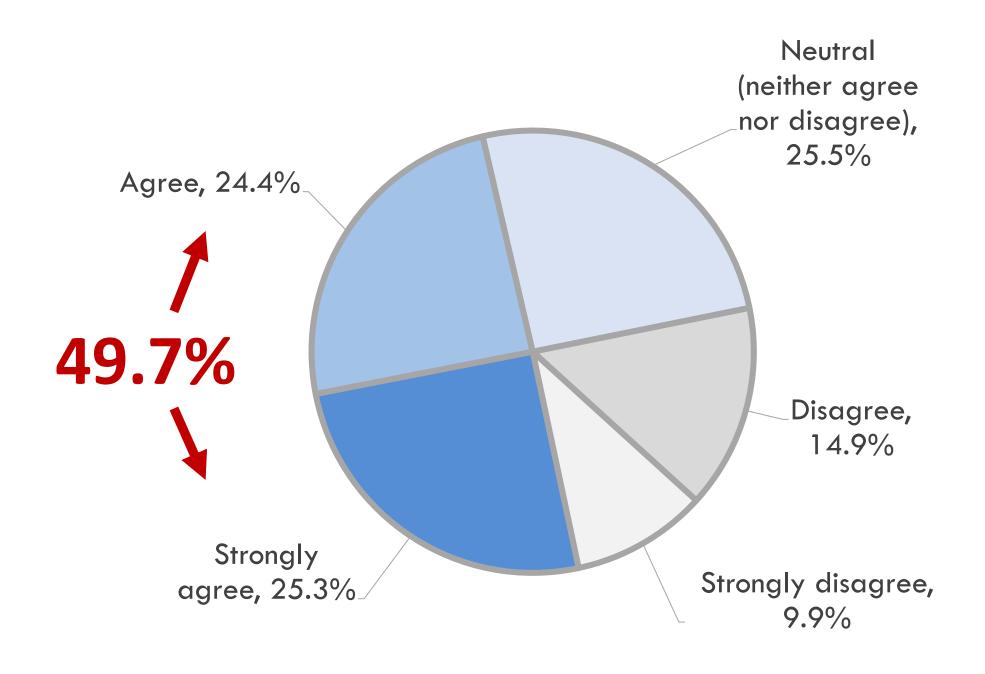
(Base: Waves 20, 28-39 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205 and 1,204 completed surveys.)



# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

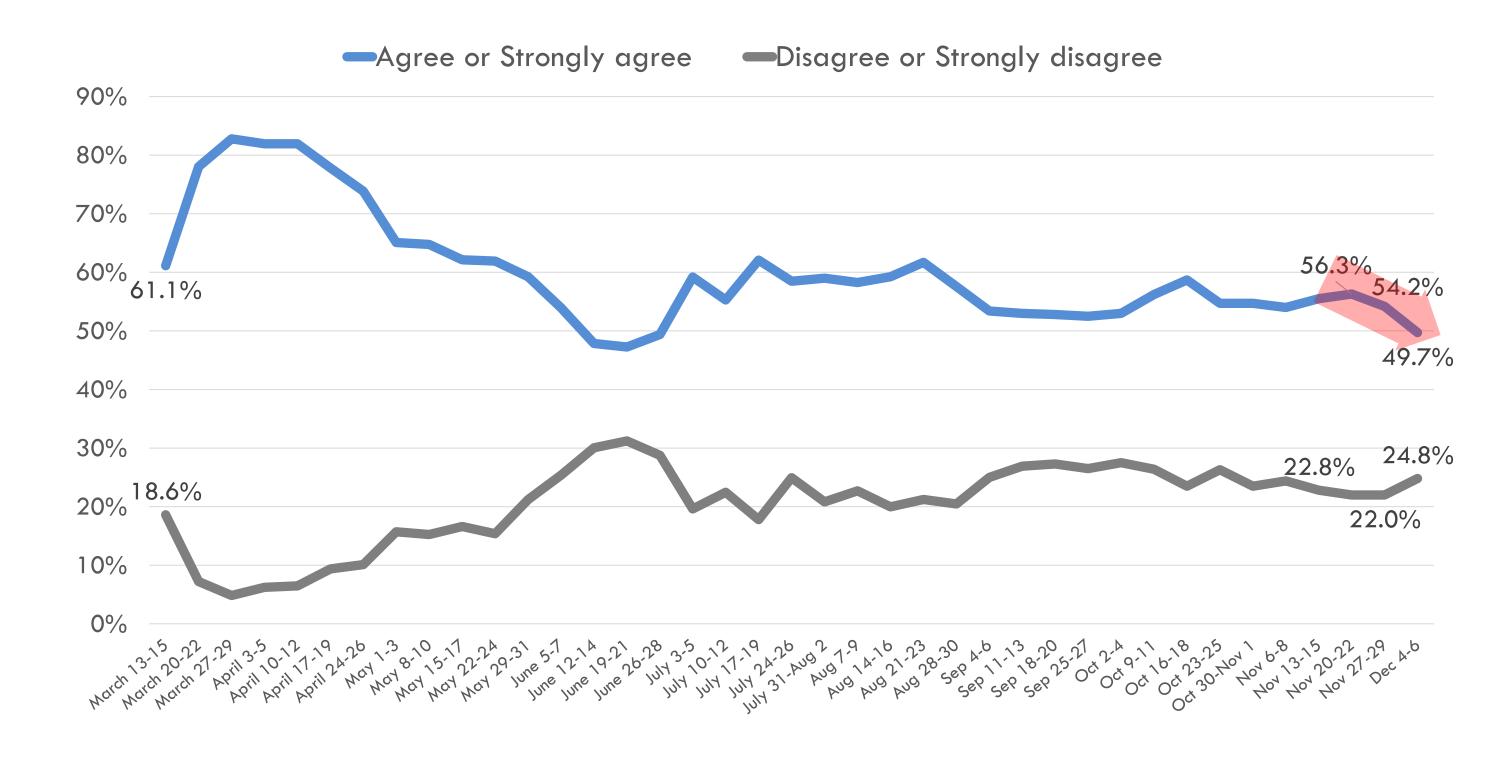
#### How much do you agree with the following statement?

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



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





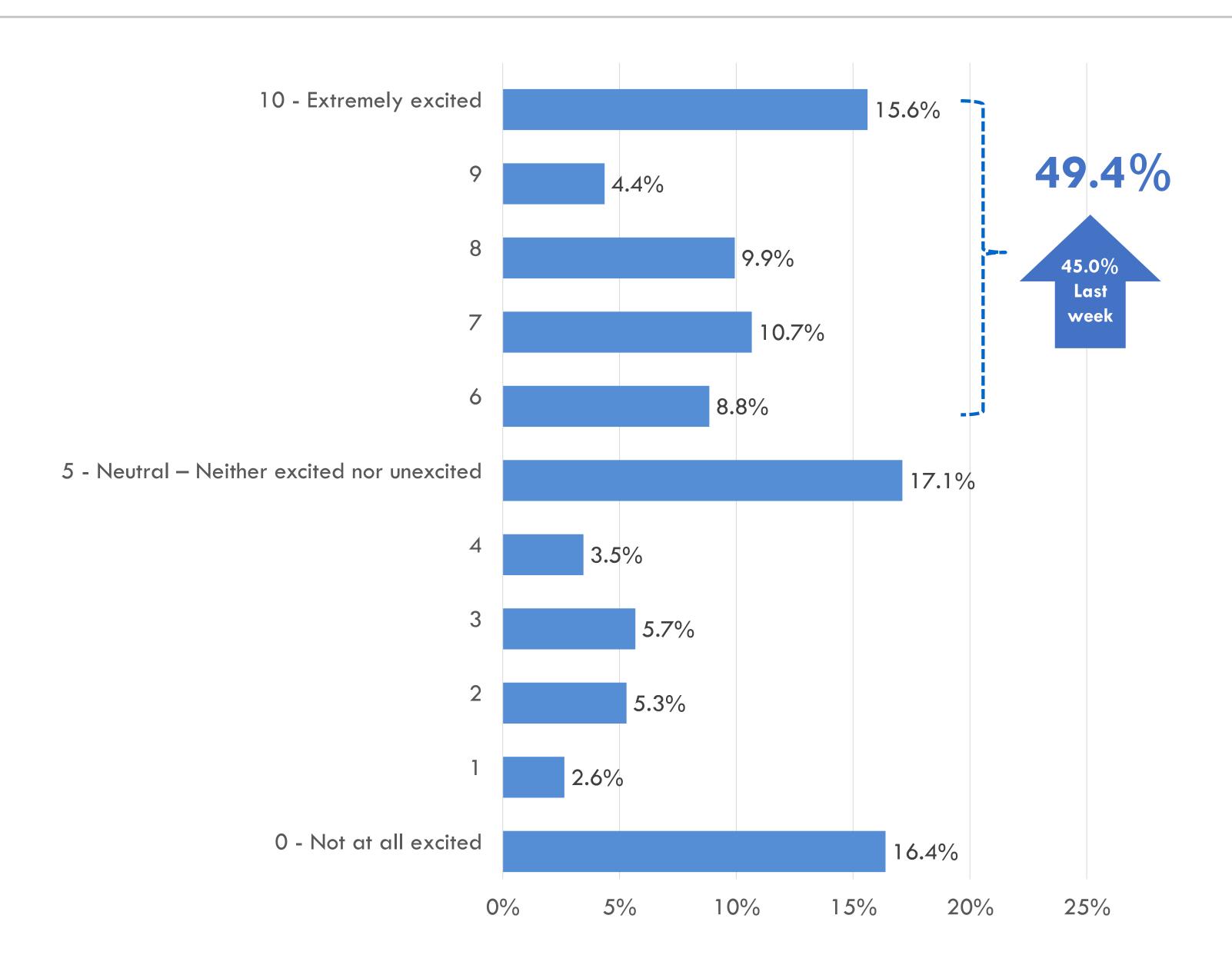


#### EXCITEMENT TO TRAVEL NOW

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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



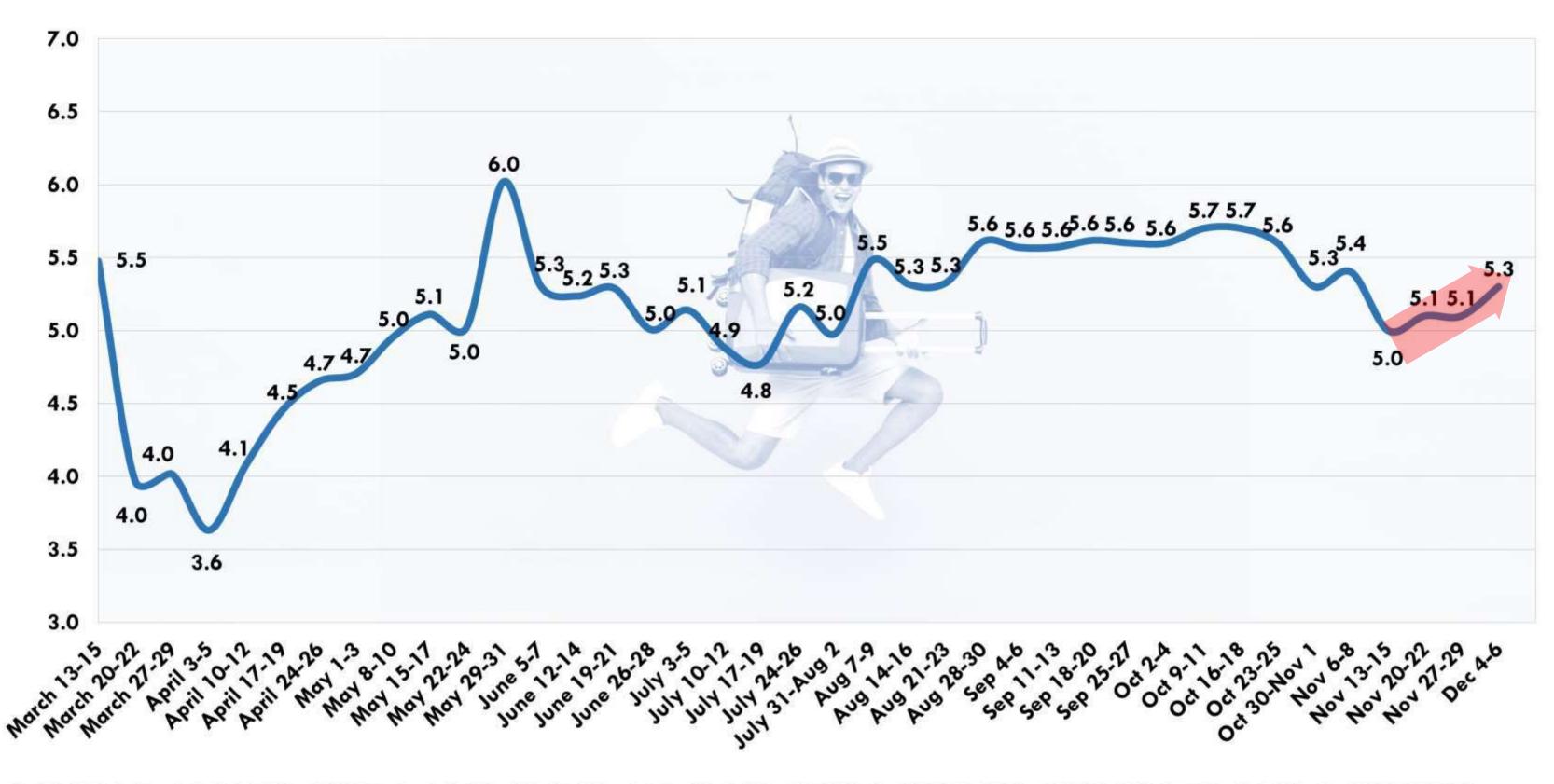


#### EXCITEMENT TO TRAVEL RIGHT NOW

#### MARCH 13 - DECEMBER 6



**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)

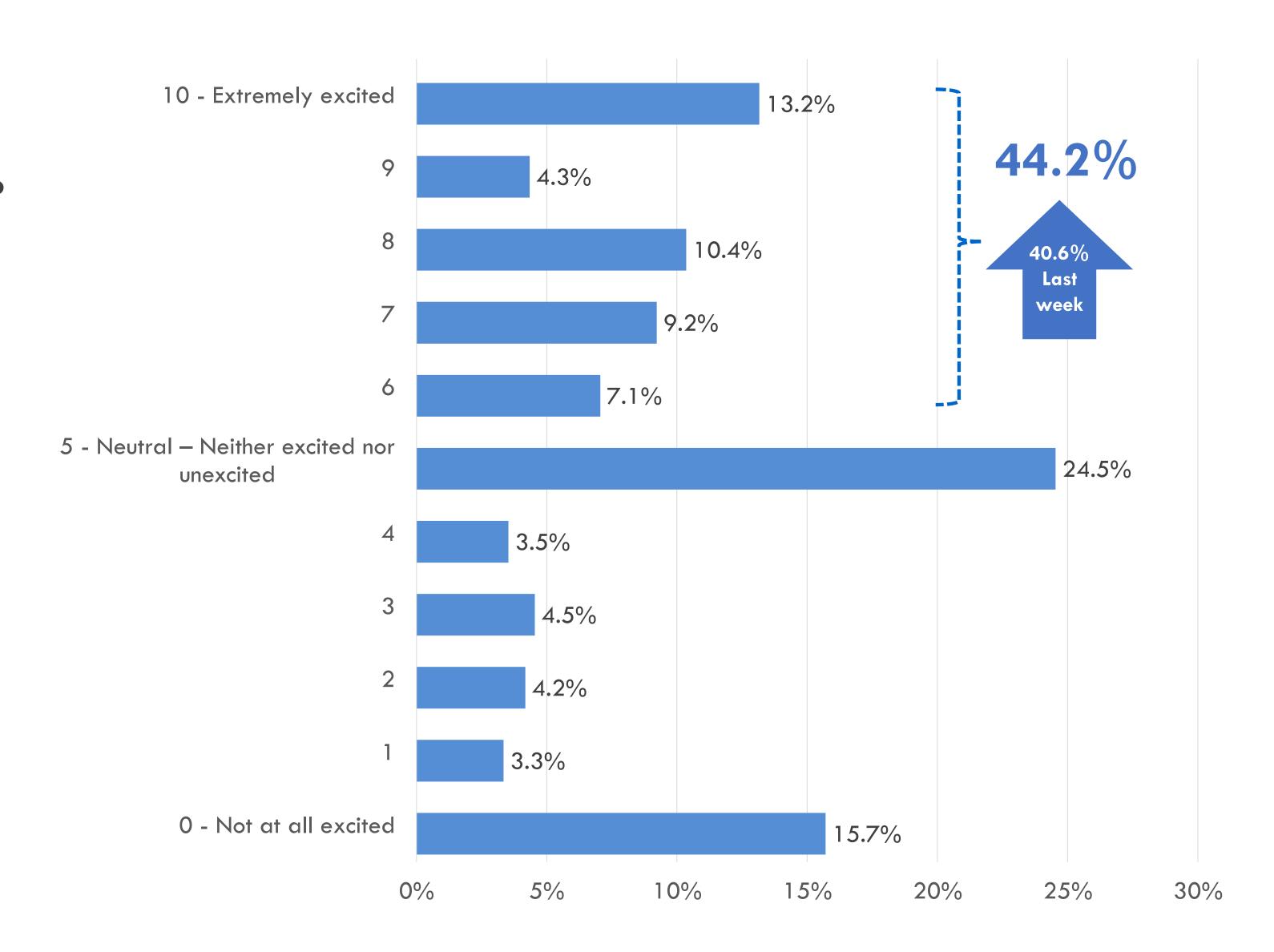
(Base: Waves 1-39. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205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



## OPENNESS TO TRAVEL INFORMATION

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

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



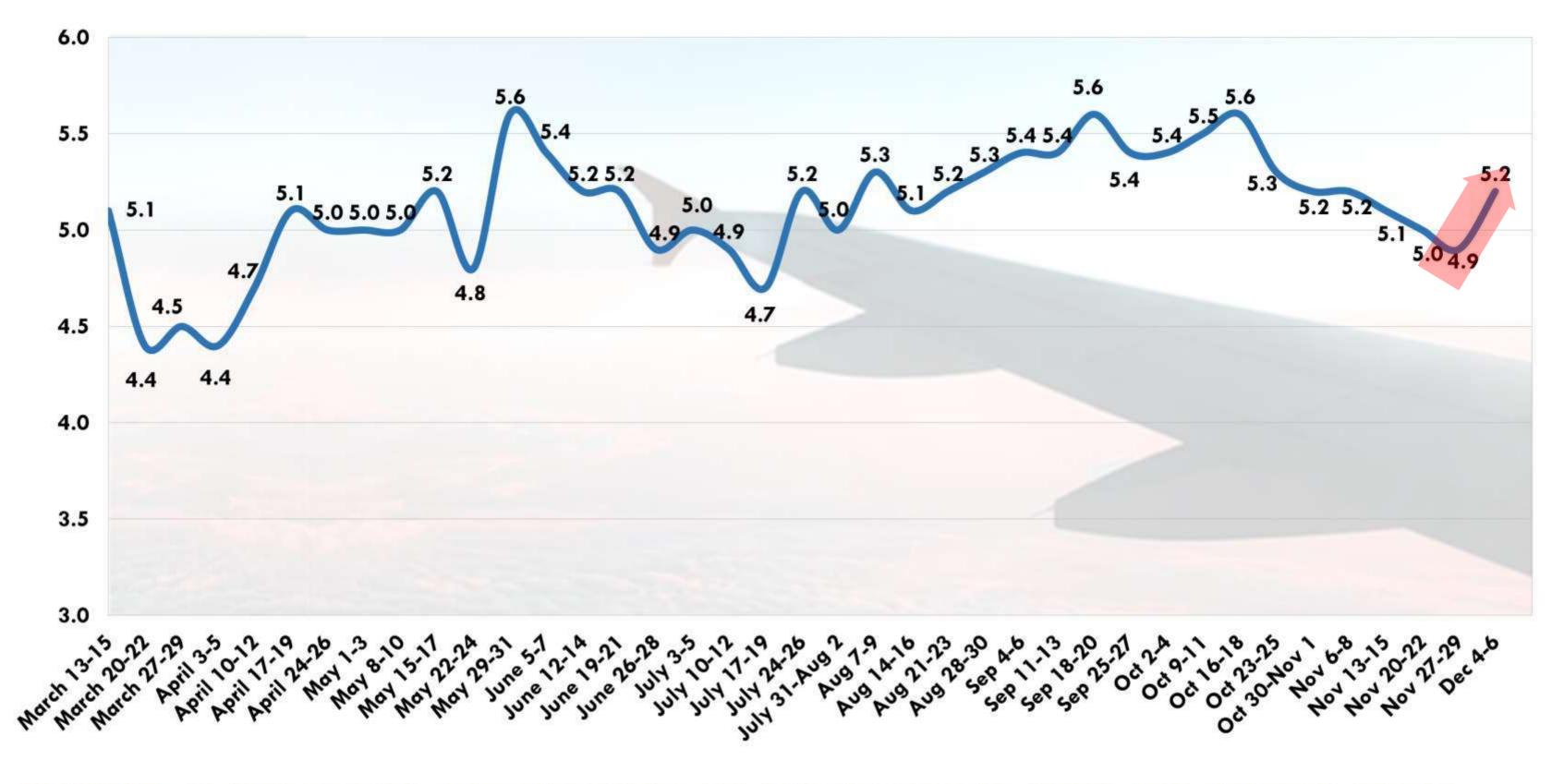


#### OPENNESS TO TRAVEL INSPIRATION

#### MARCH 13 - DECEMBER 6



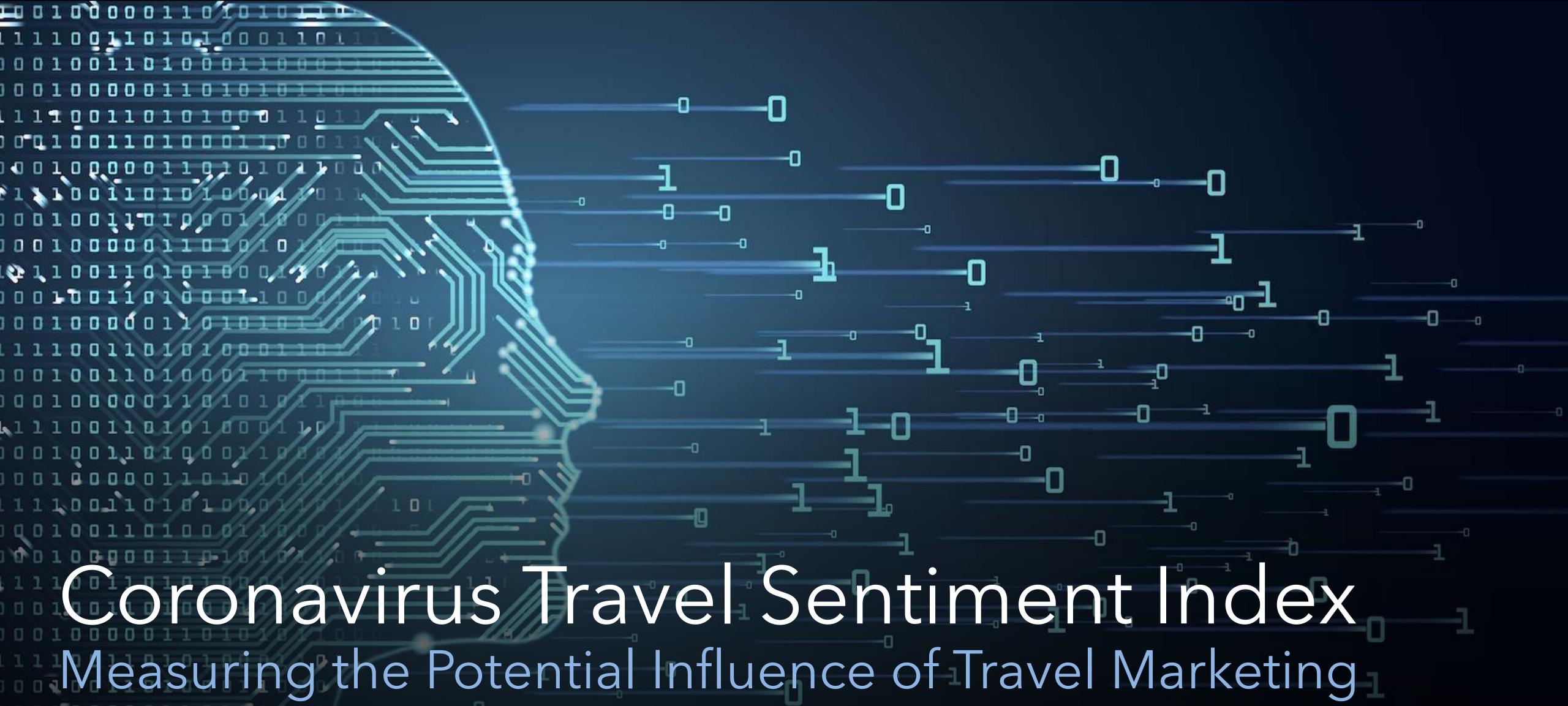
**OPEN TO TRAVEL INSPIRATION** (AVERAGE SCORE ON AN 11-POINT SCALE)



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

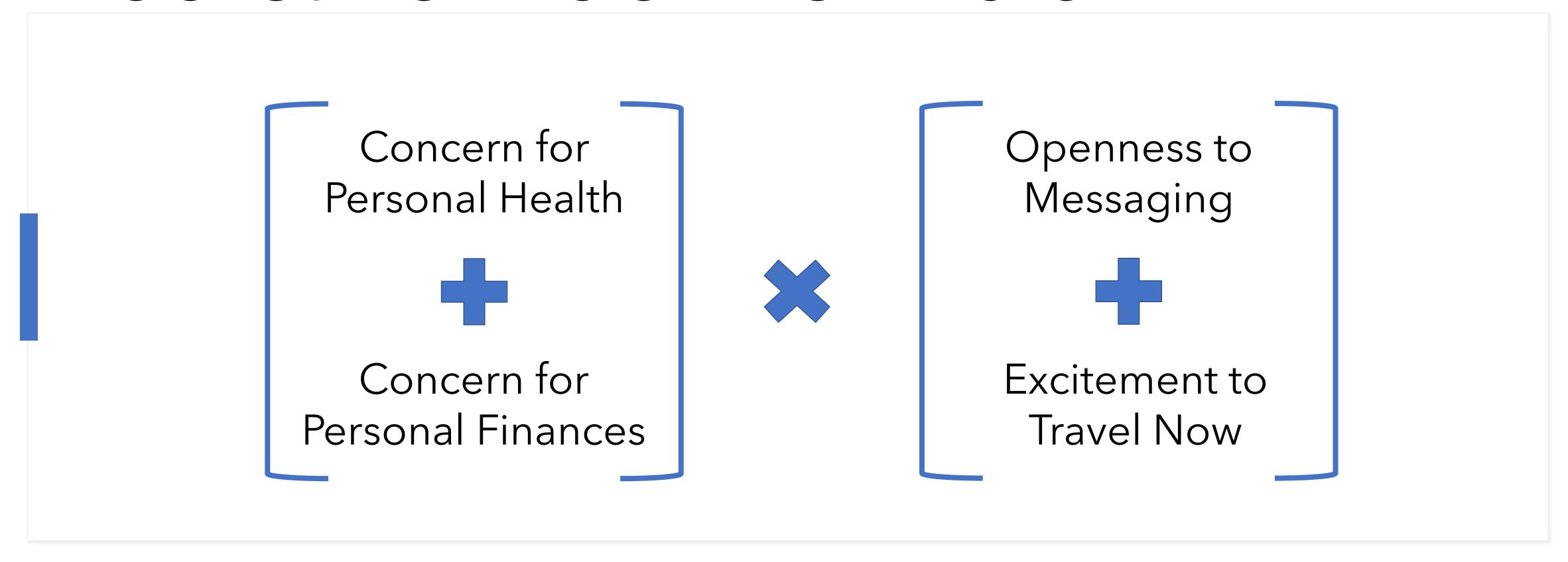
(Base: Waves 1-39. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205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





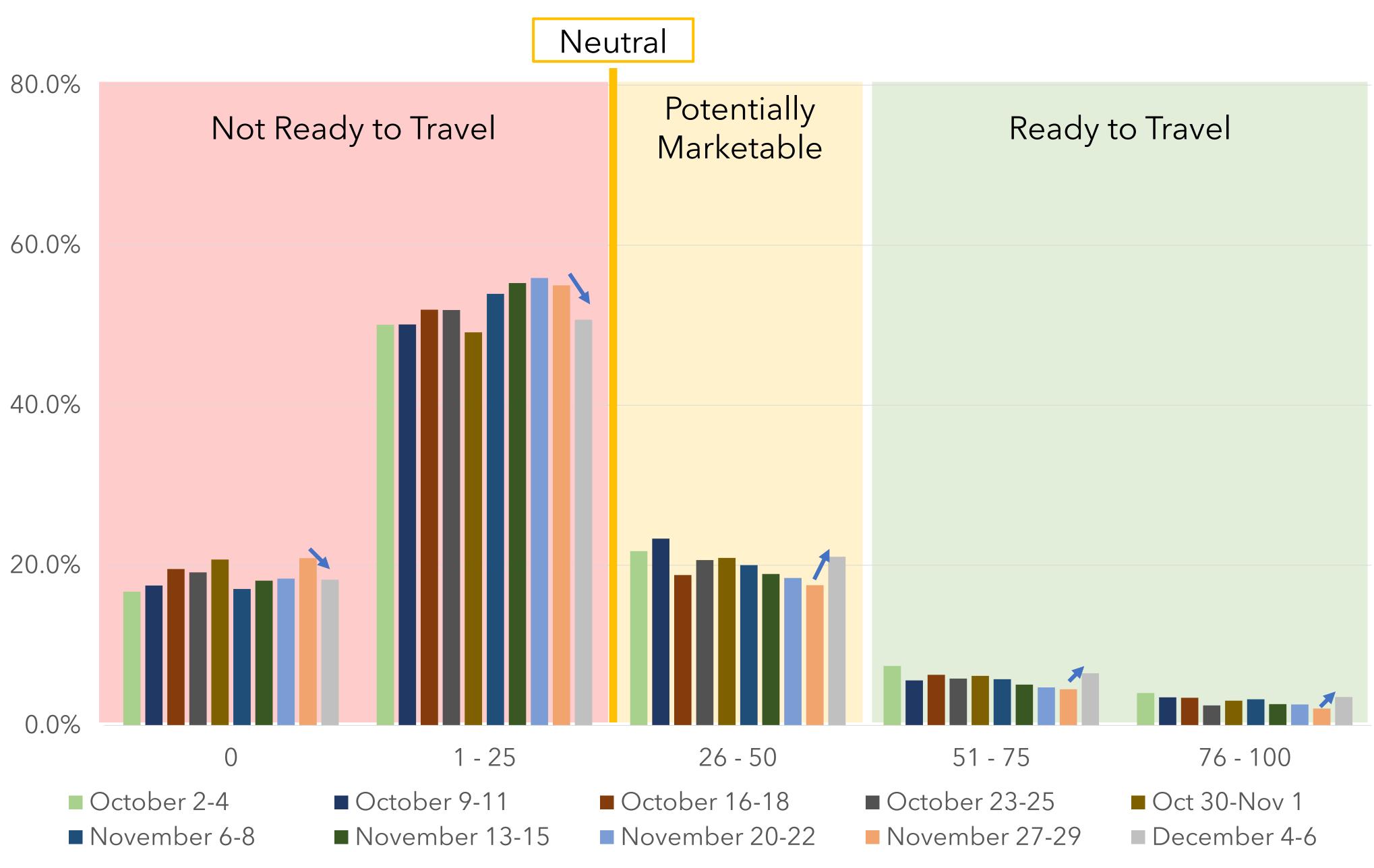
Highlights from the Week of December 7th

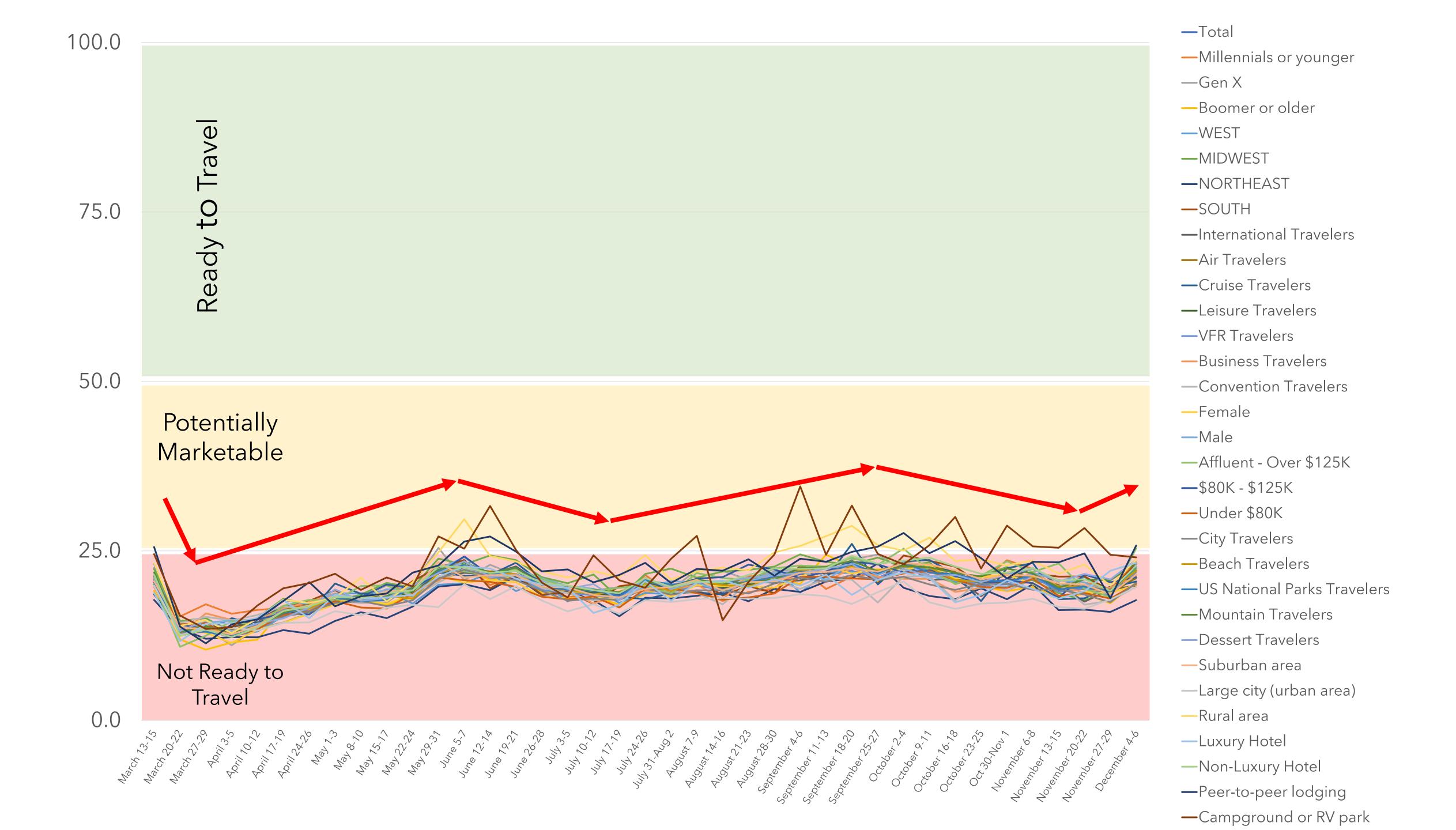
# Predictive Index Formula

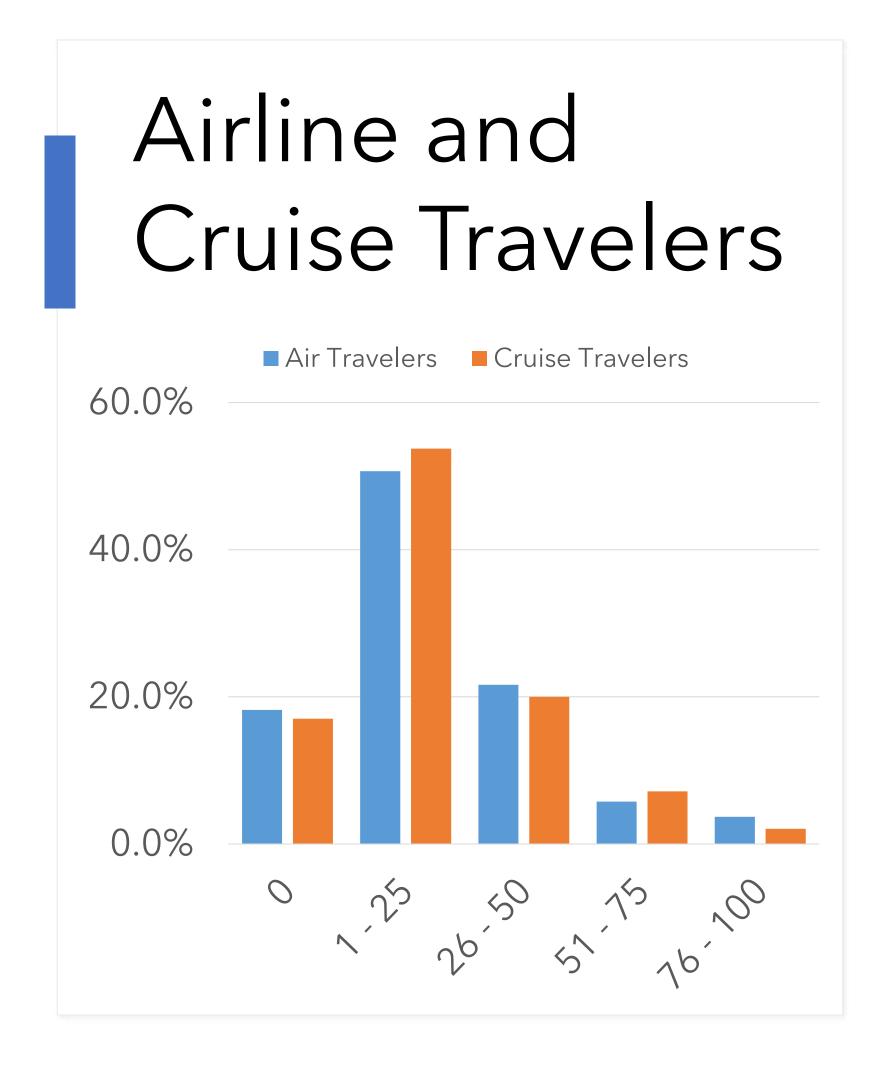


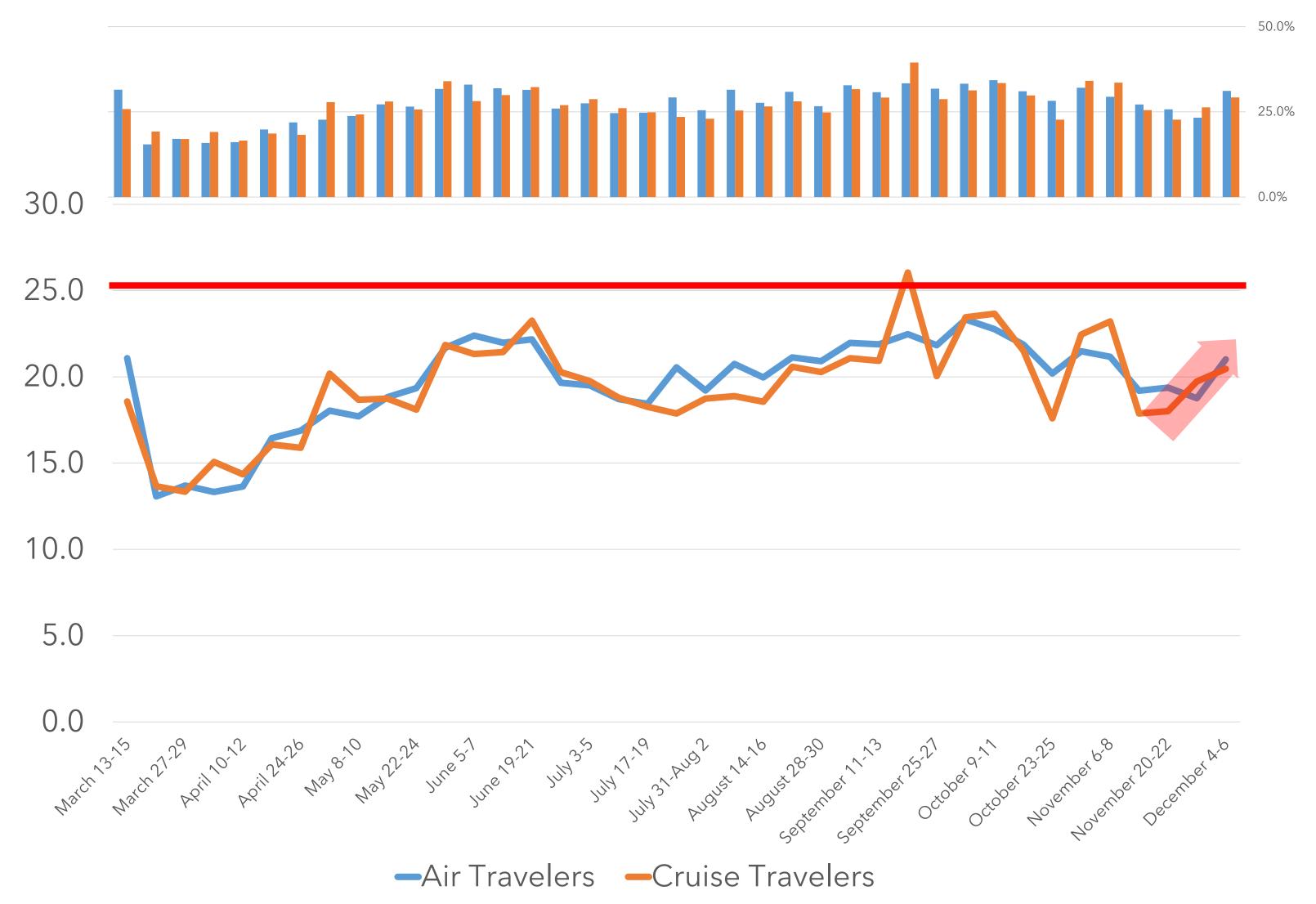
\*Normalized to a 100pt scale

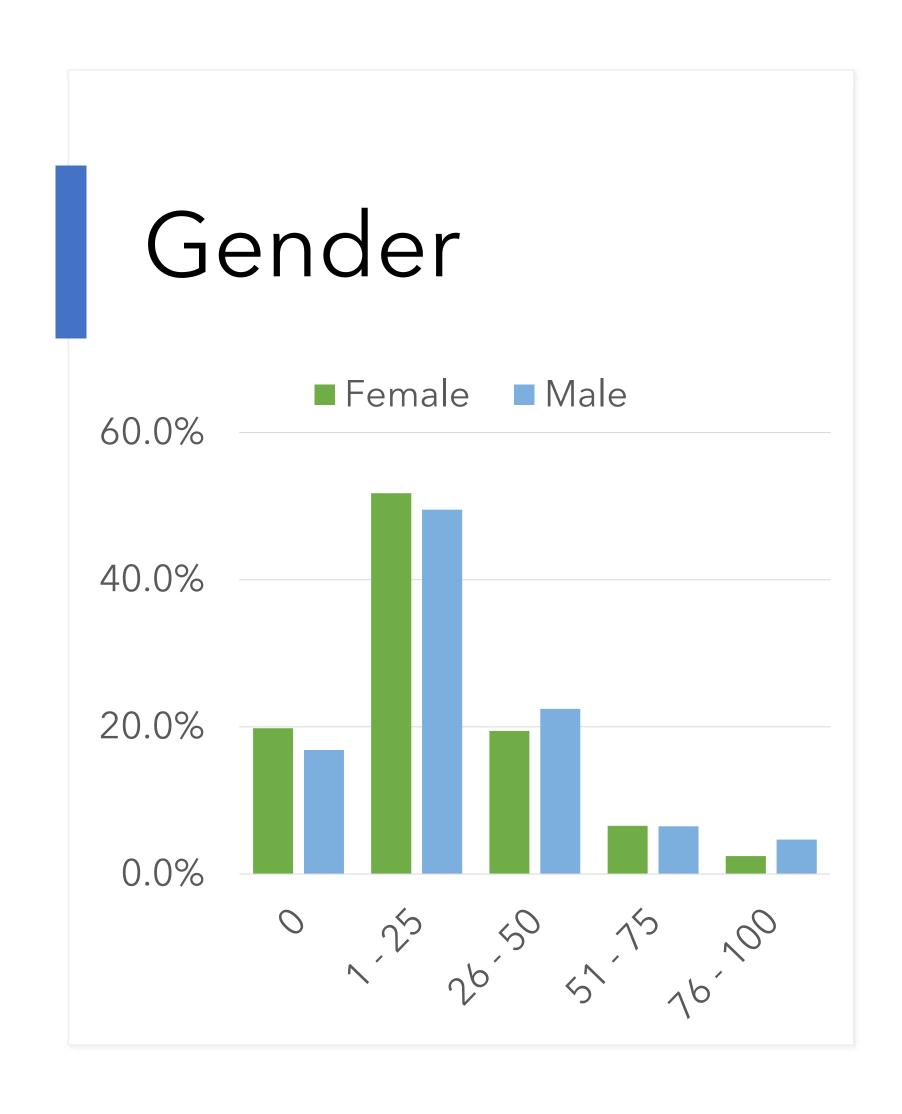
#### **Travel Outlook**

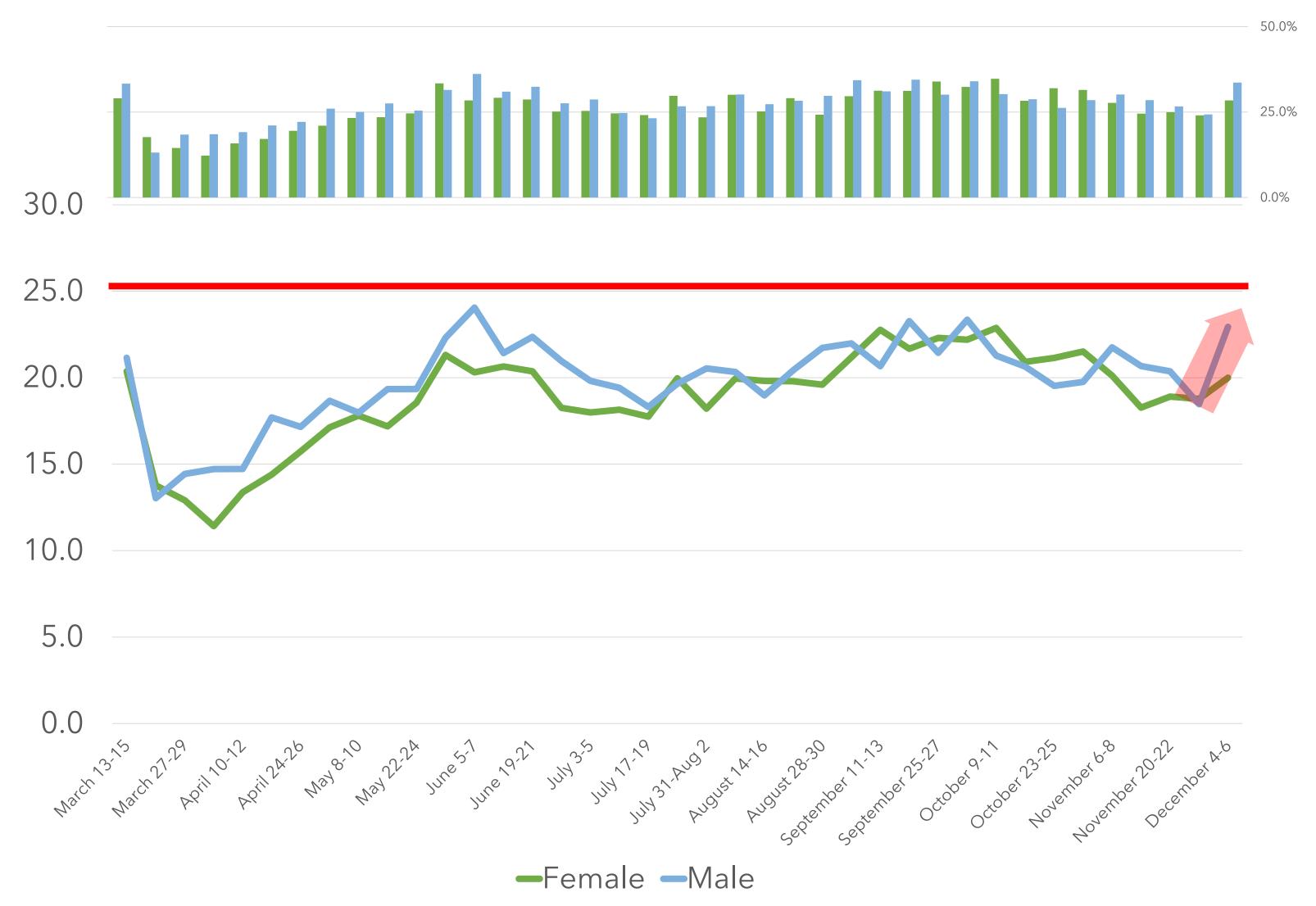


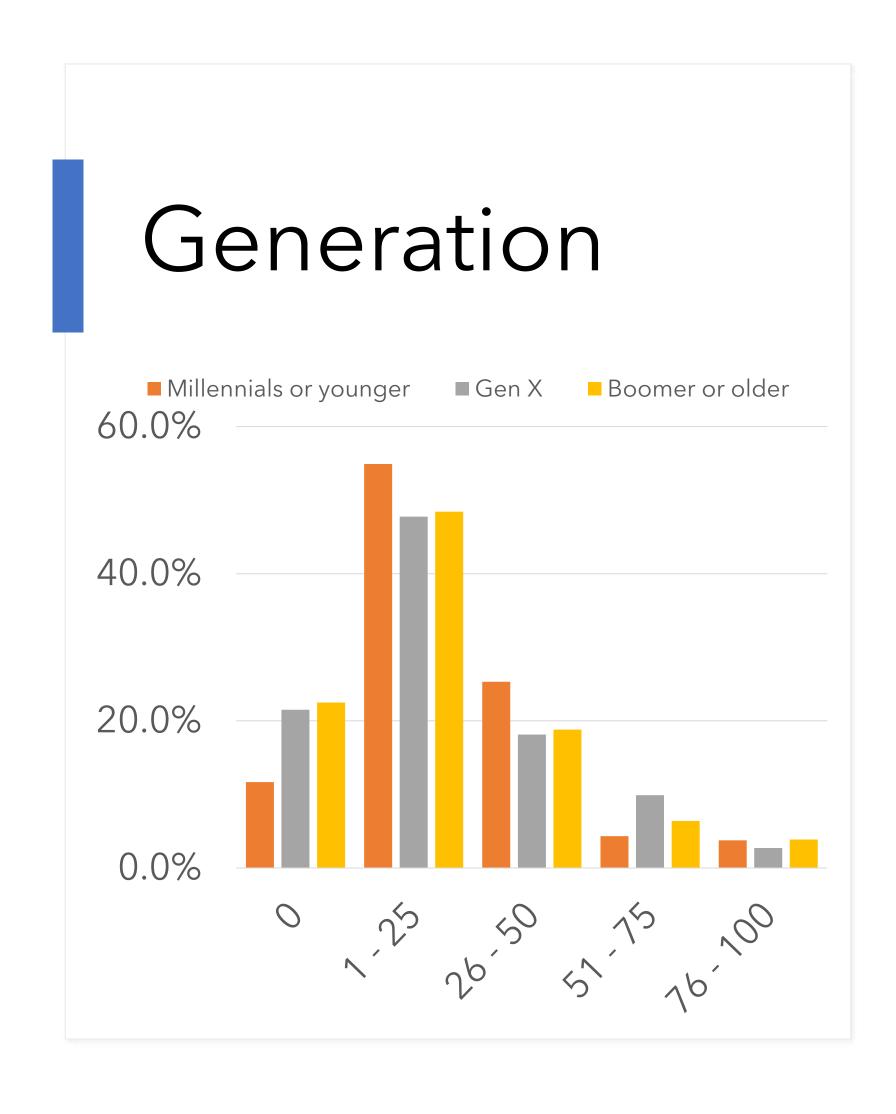


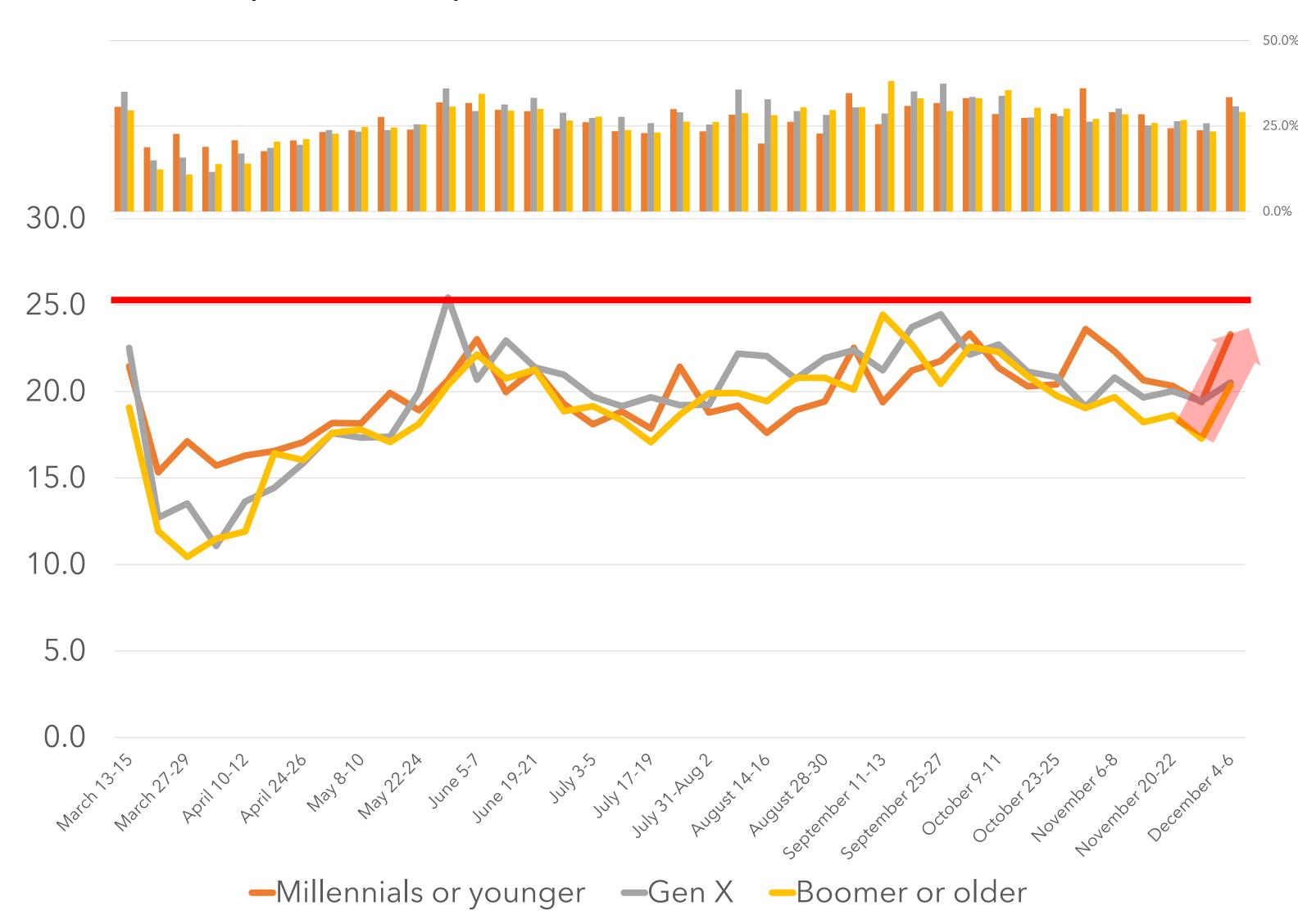


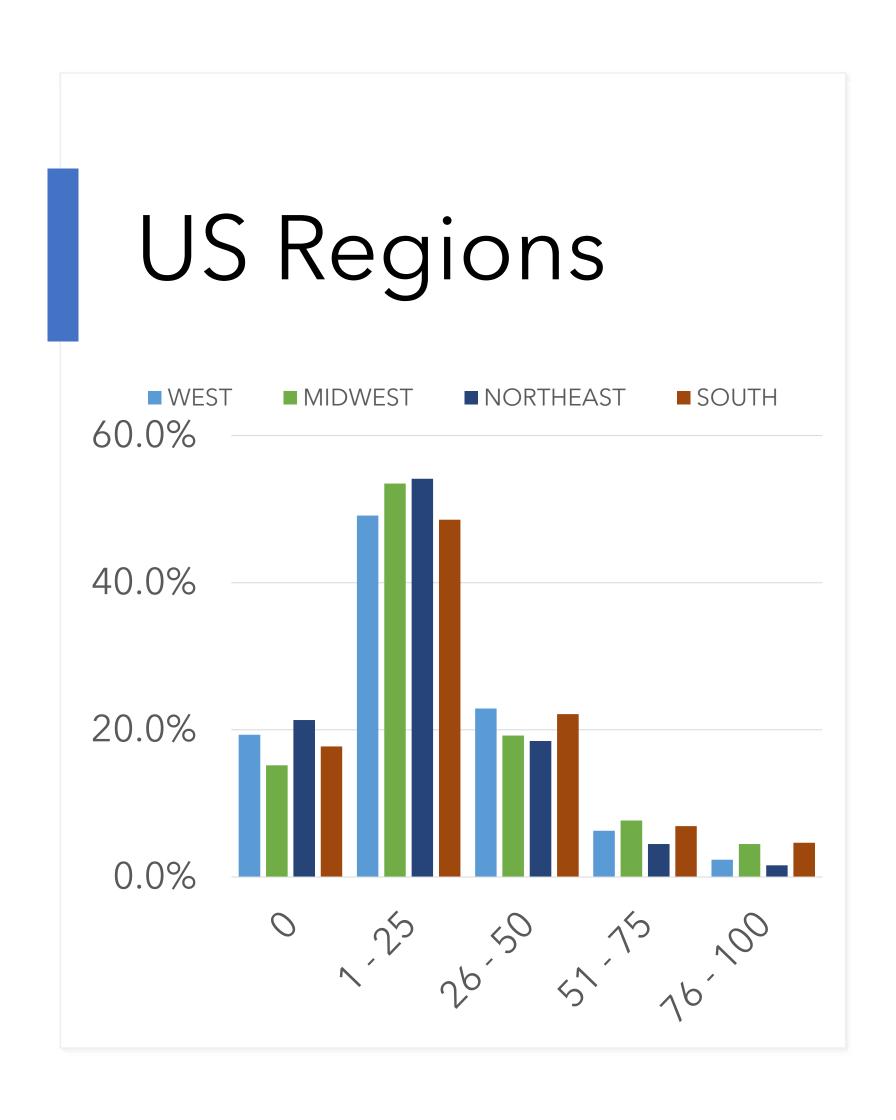


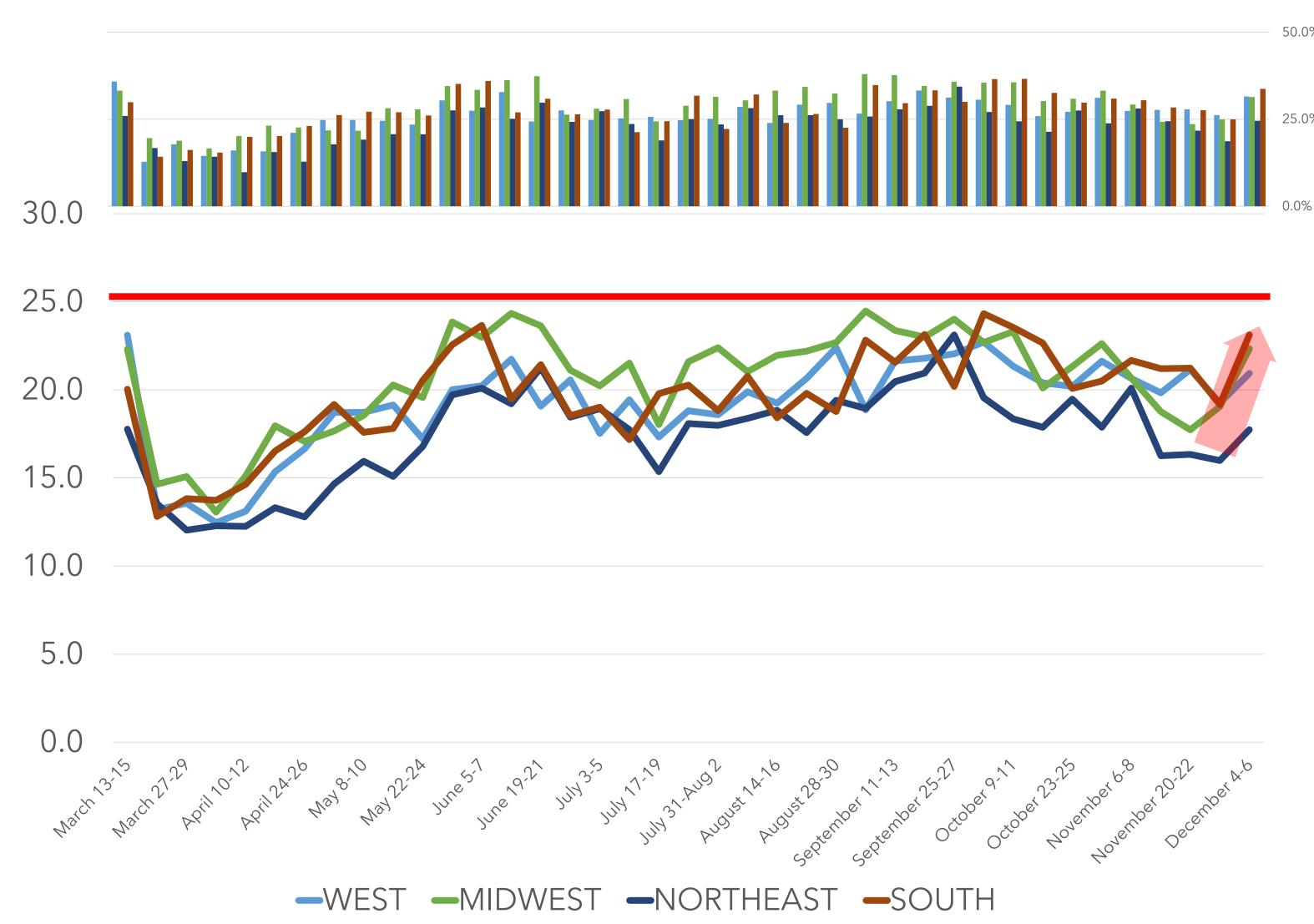


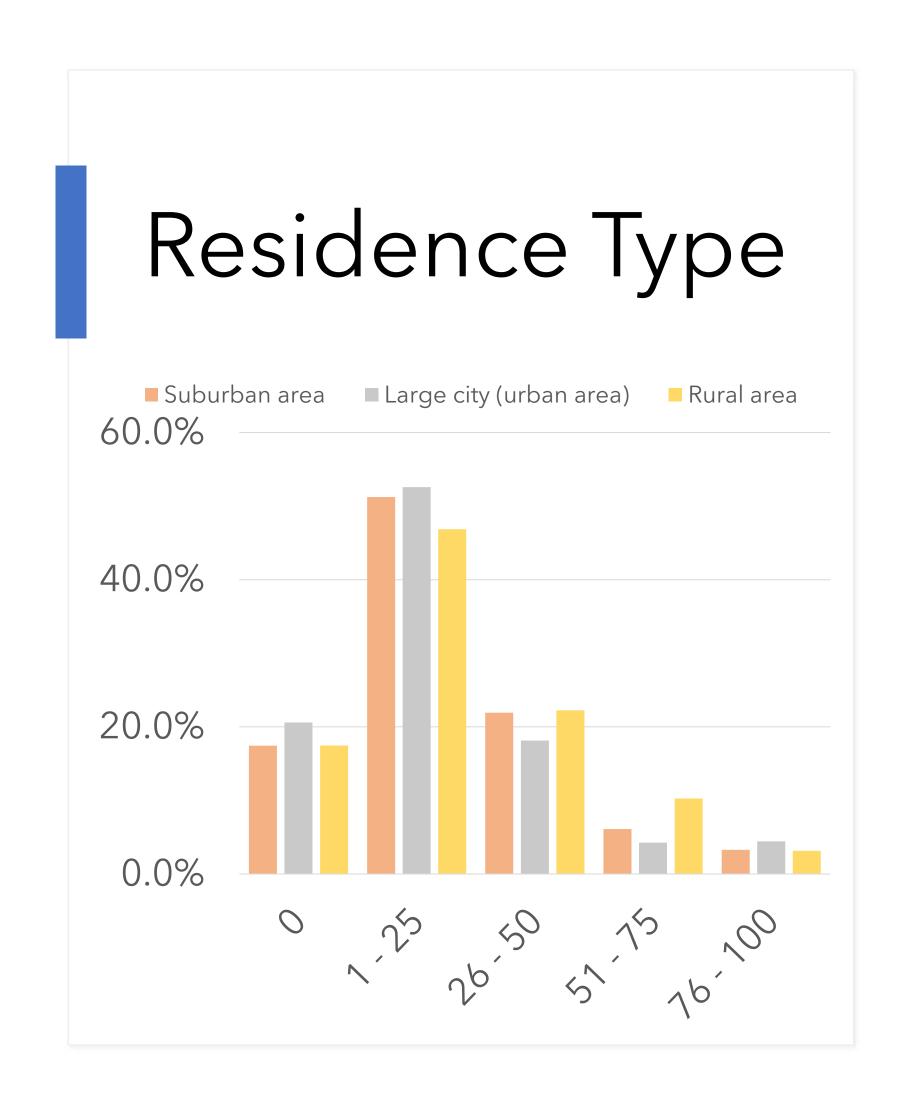


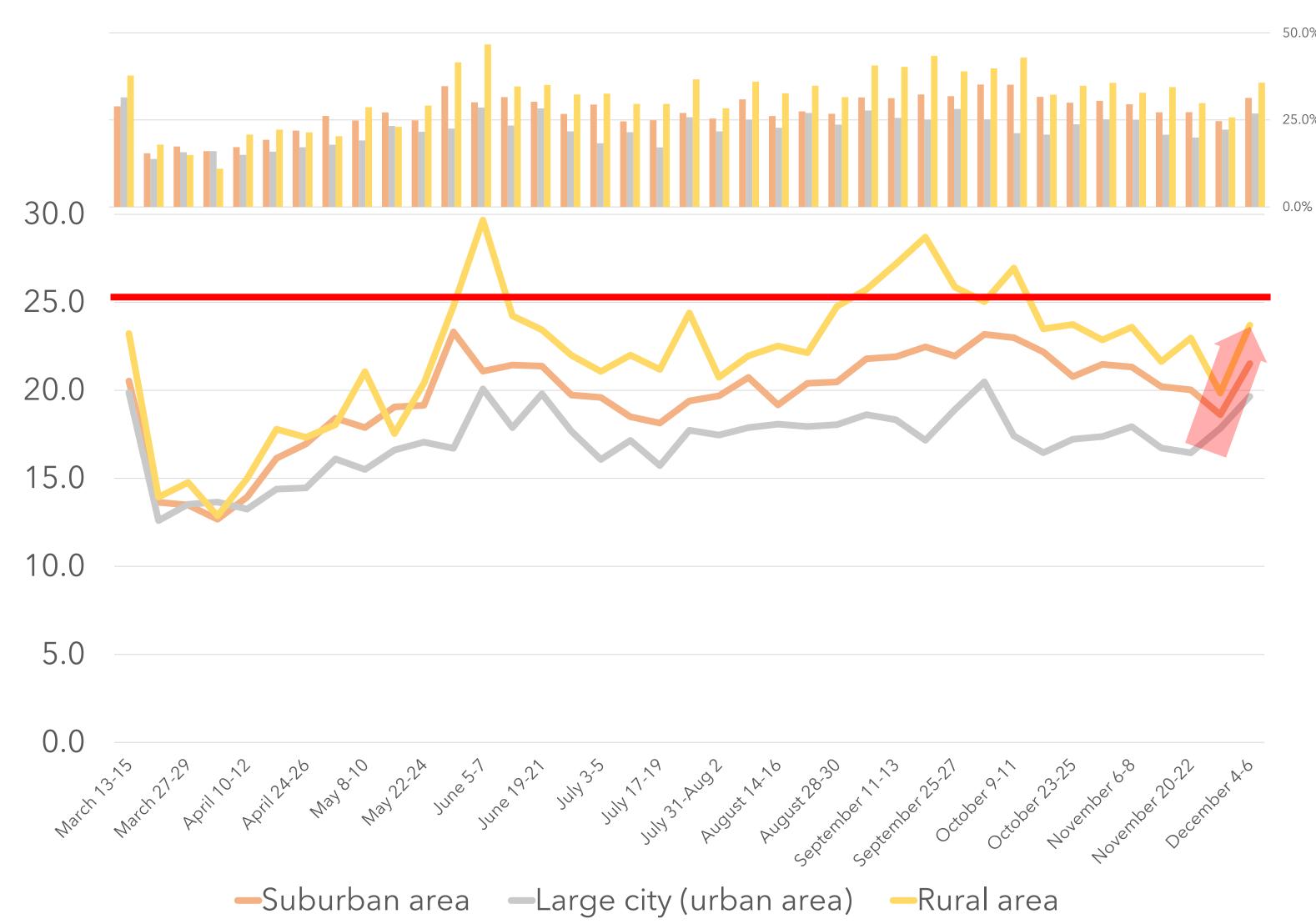


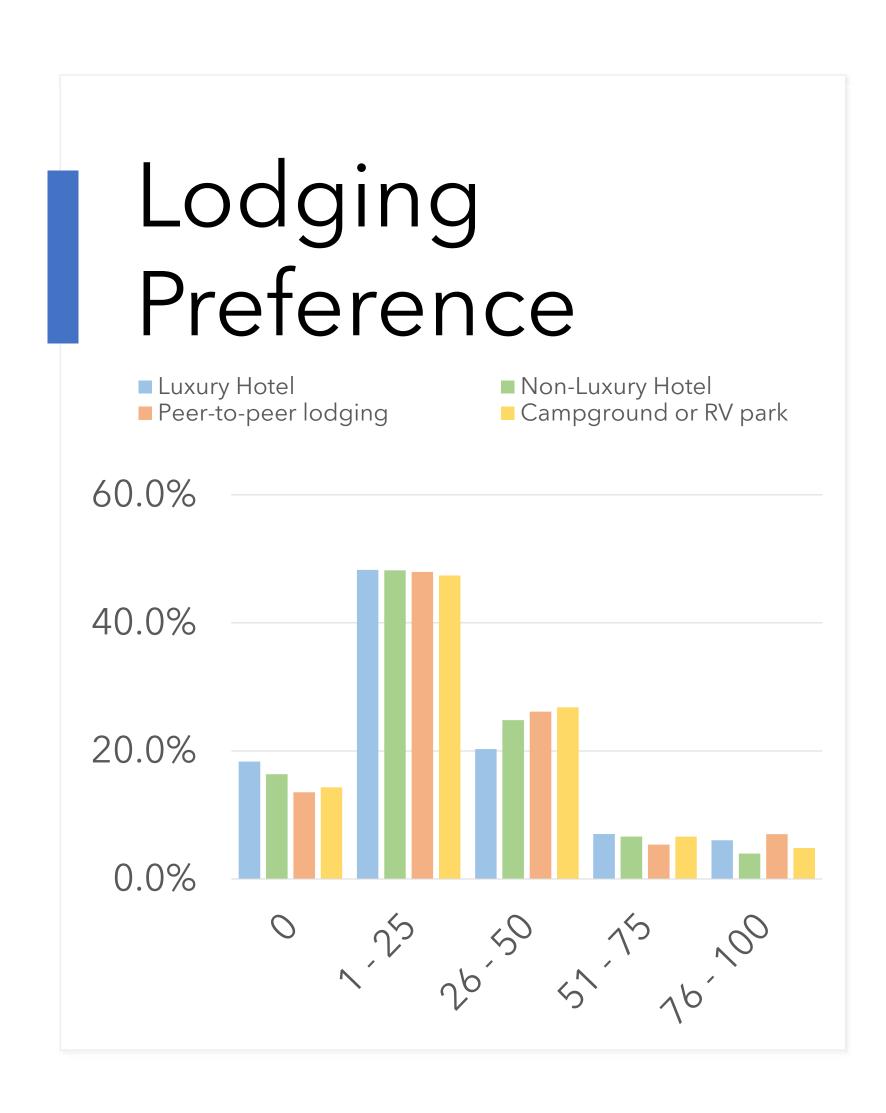


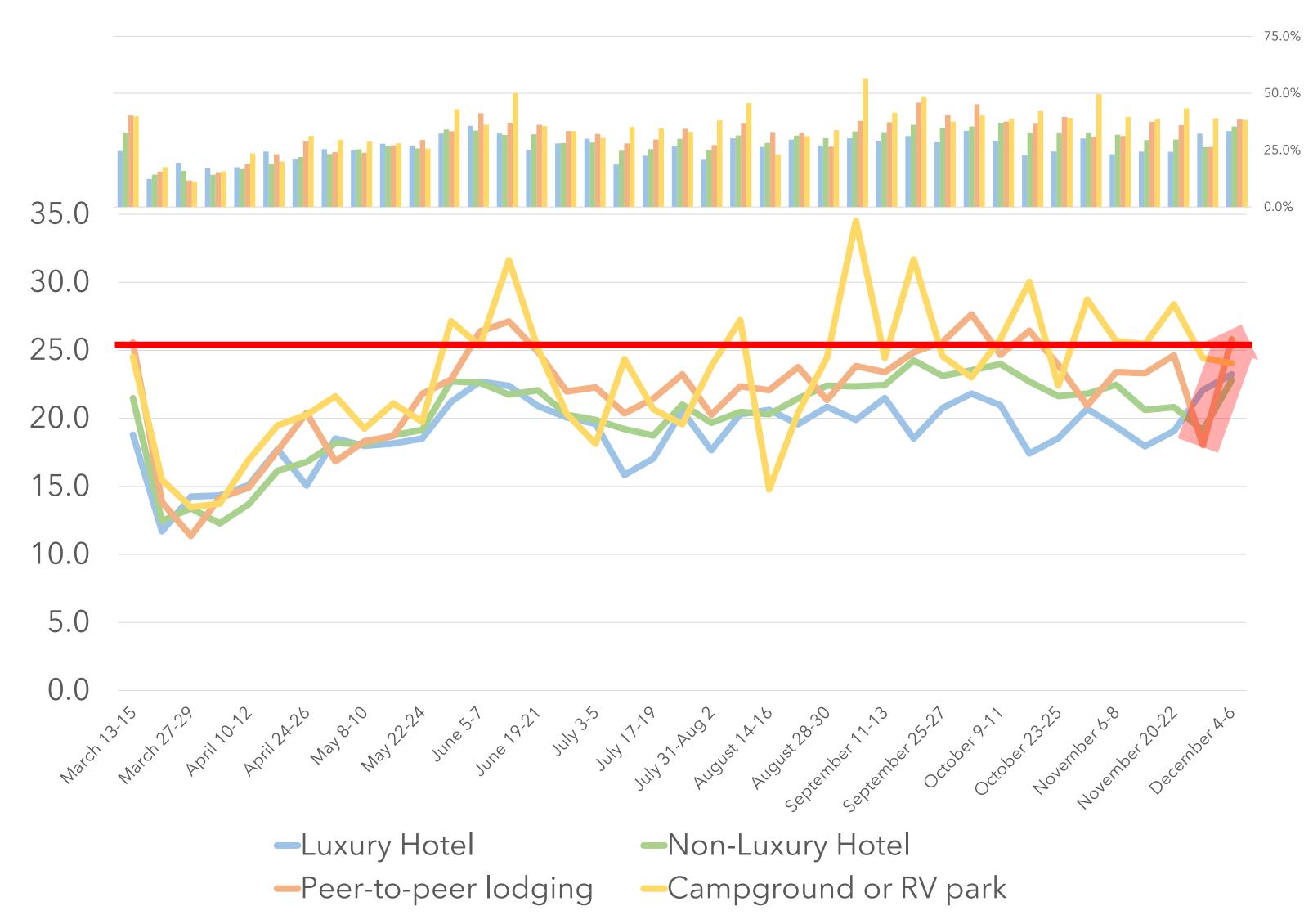














#### THOSE WHO ARE READY TO TRAVEL

- Are relatively more optimistic about the pandemic. The vast majority feel comfortable going out in their local community
- Generally perceive travel activities to be safe and are confident that they can travel safely in the current environment
- Few feel guilty traveling and they disagree that travel should be limited to essential needs
- Are more interested in traveling in the near-term as a result of discounts and price cuts



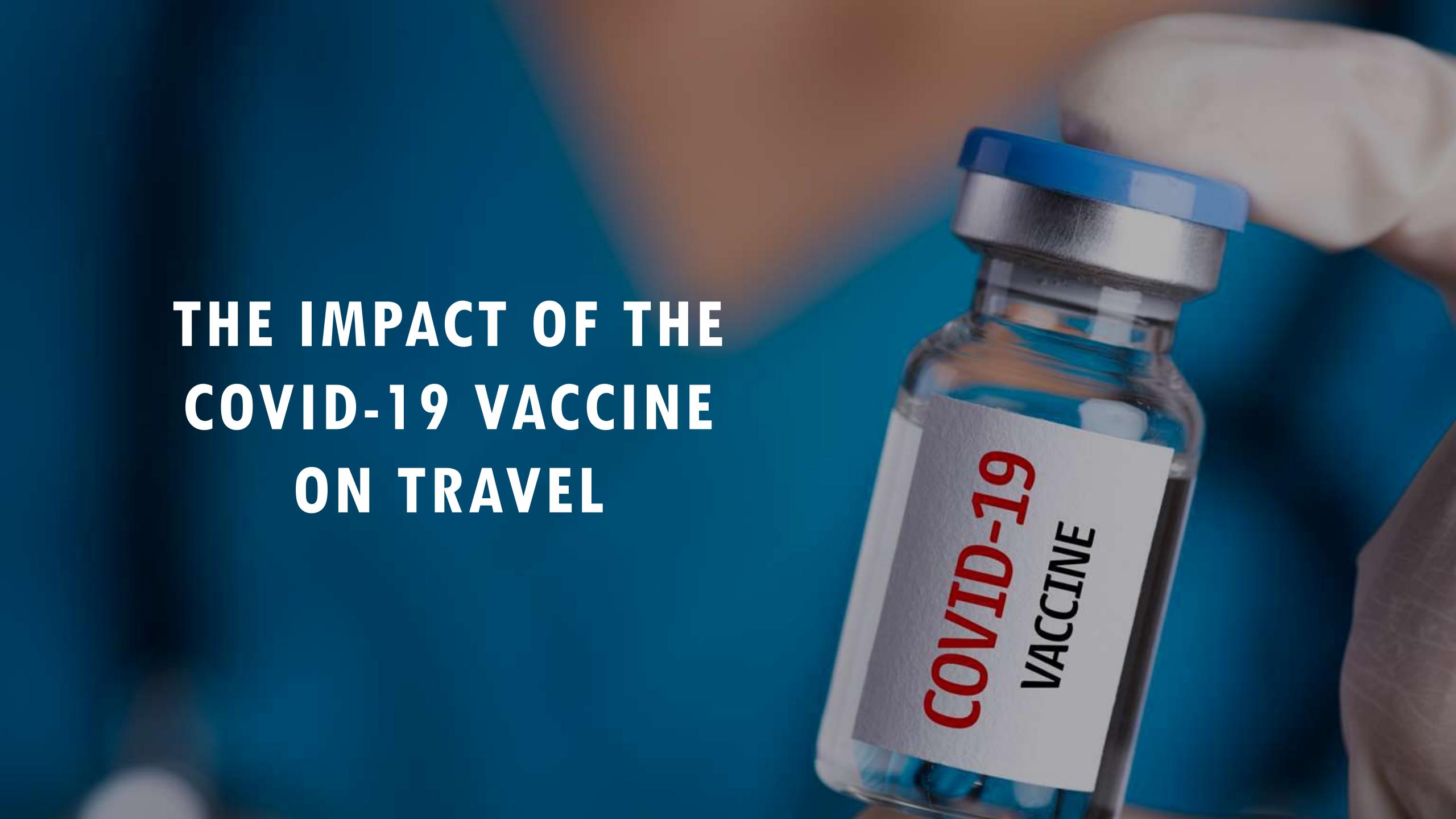
#### THOSE WHO ARE READY TO TRAVEL

- They have been traveling: the majority have taken a road trip since the onset of the pandemic and a quarter have taken a trip by air
- On average, they took 3.8 leisure trips this year and are likely to take 4.6 trips in 2021
- For their 2021 travels, they're likelier than other travelers to prioritize visiting new places they haven't been to before and theme parks
- Leisure travel spending will be a high priority for them in 2021



# Key Takeaways

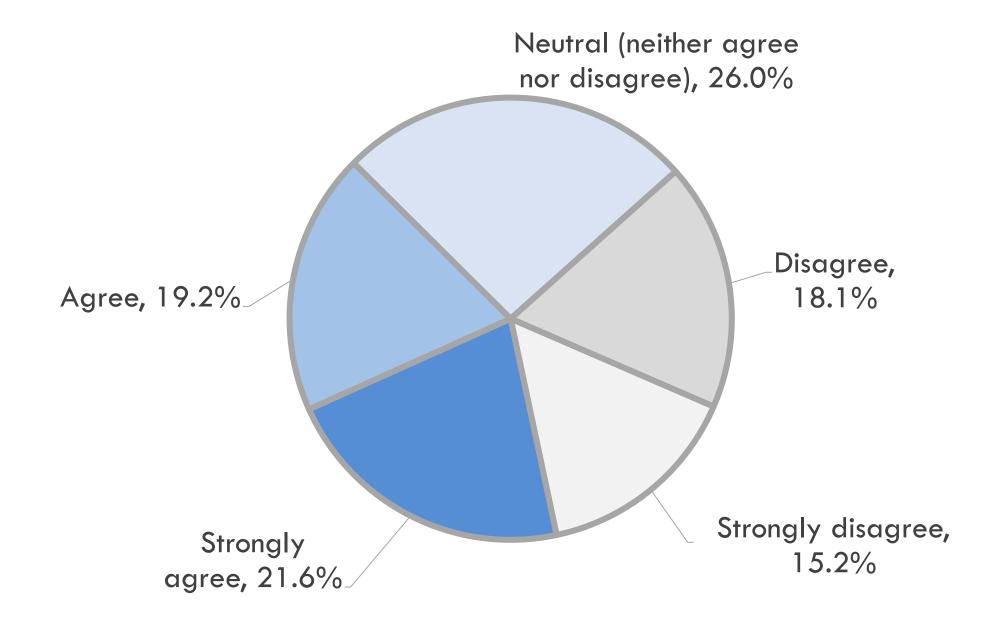
- While Americans continue to have the same high degrees of concern about their friends or family contracting the virus, concerns about personally contracting the virus, and the virus' impact on personal finances and the national economy dropped in intensity
- Nevertheless, Americans largely see the last month of 2020 as one in which the pandemic situation is going to worsen
- •The current state of the pandemic has eroded Americans' confidence that travel can be done safely. This current sentiment has some impact on marketability for travel right now
- However, Americans also still demonstrate openness to travel messaging and indicate travel marketability
- Those most ready to travel have been taking trips throughout the pandemic, are out for leisure in their own communities and are looking for new experiences in 2021



#### AVOIDING TRAVEL UNTIL THERE IS A VACCINE

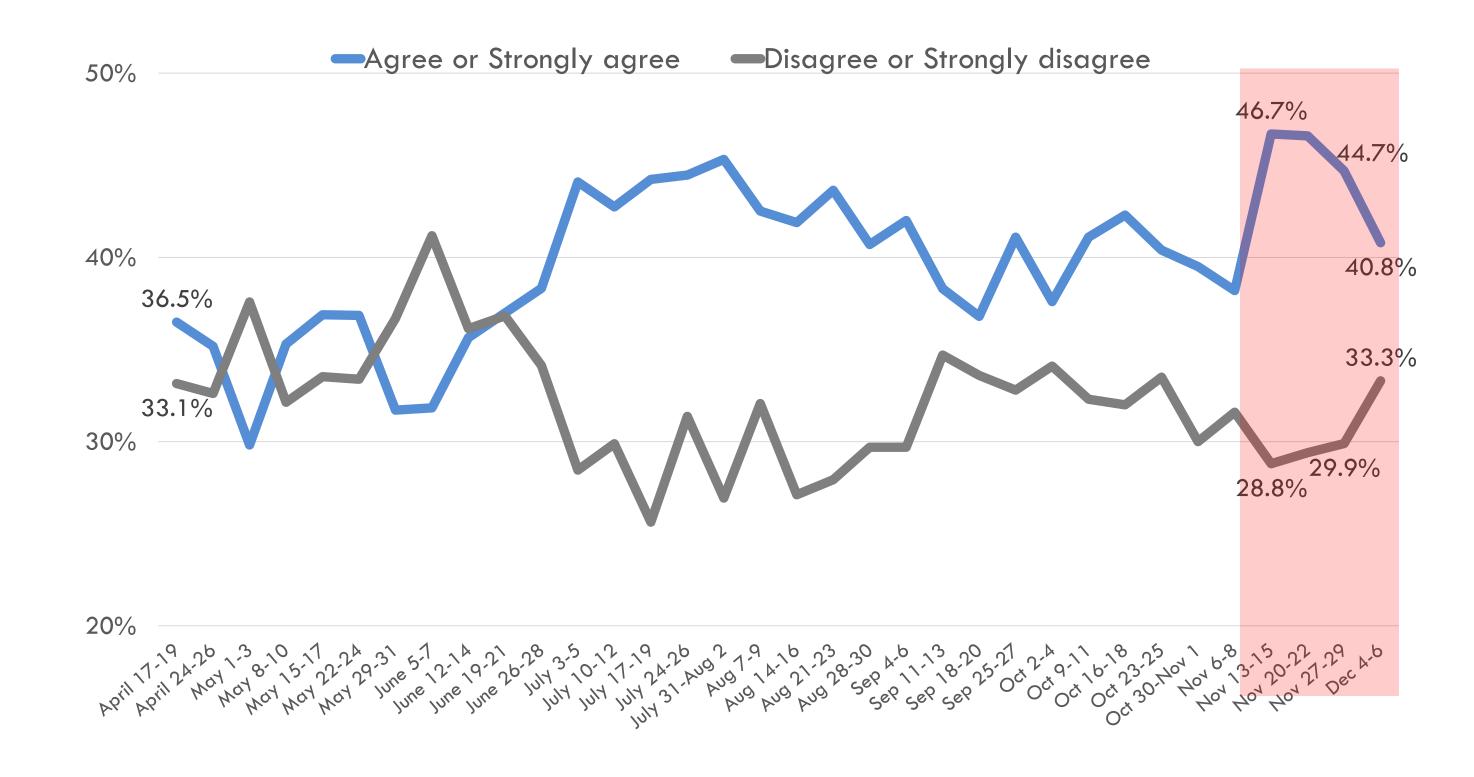
#### How much do you agree with the following statement?

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



(Base: Waves 6-39. 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 and 1,204 completed surveys.)

#### Historical data



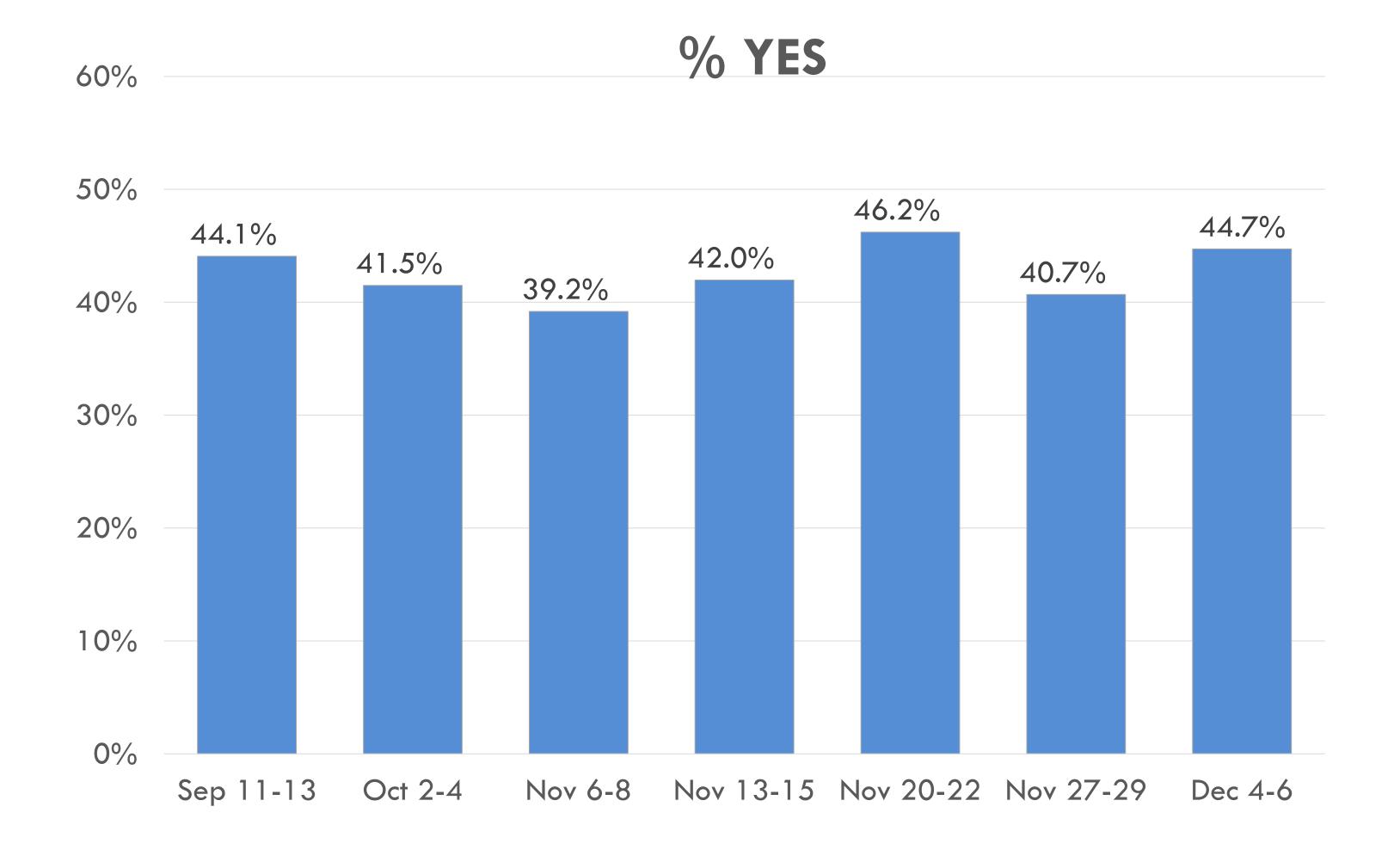


#### WILLINGNESS TO TAKE A VACCINE

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 35-39 data. All respondents, 1,205, 1,206, 1,205, 1,205 and 1,204 completed surveys.)

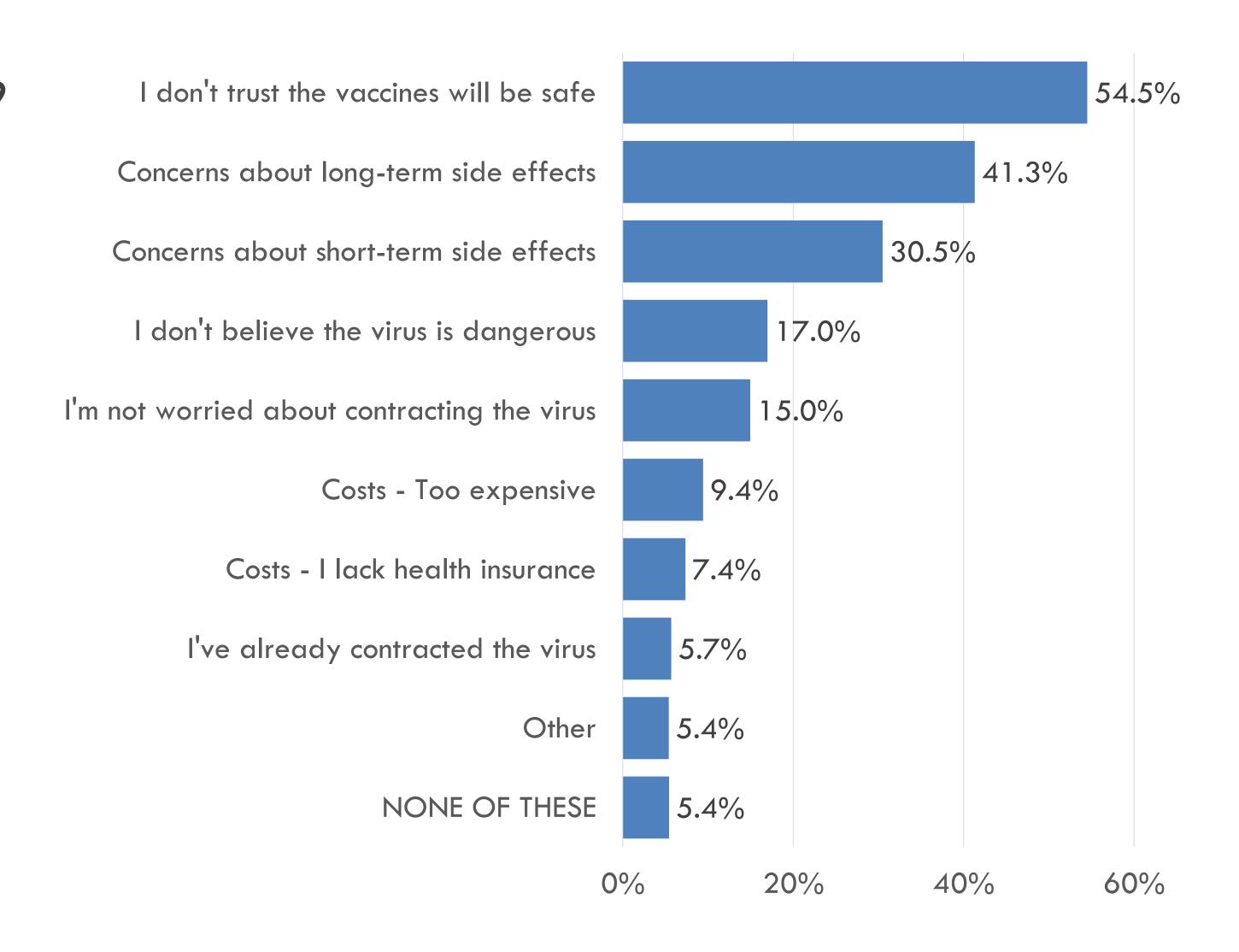




#### REASONS FOR NOT GETTING VACCINATED

Question: Why won't you take a COVID-19 vaccine when it is made available? (Select all that apply)

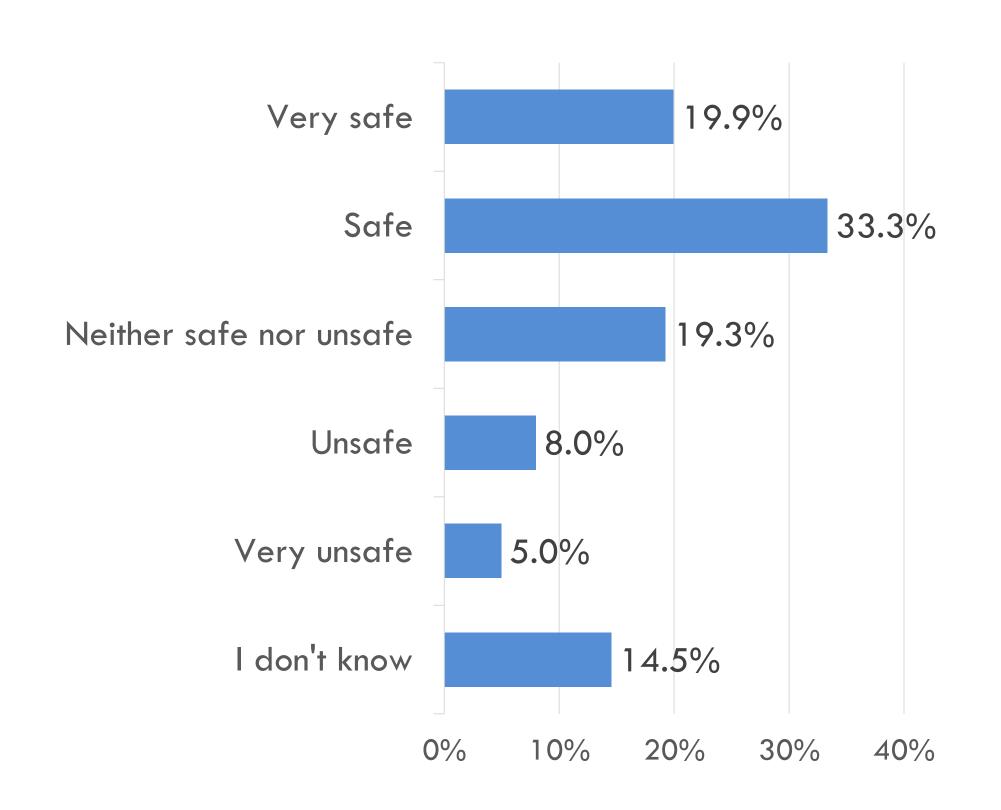
(Base: Wave 39 data. Respondents who will not get vaccinated, 254 completed surveys. Data collected Dec 4-6, 2020)





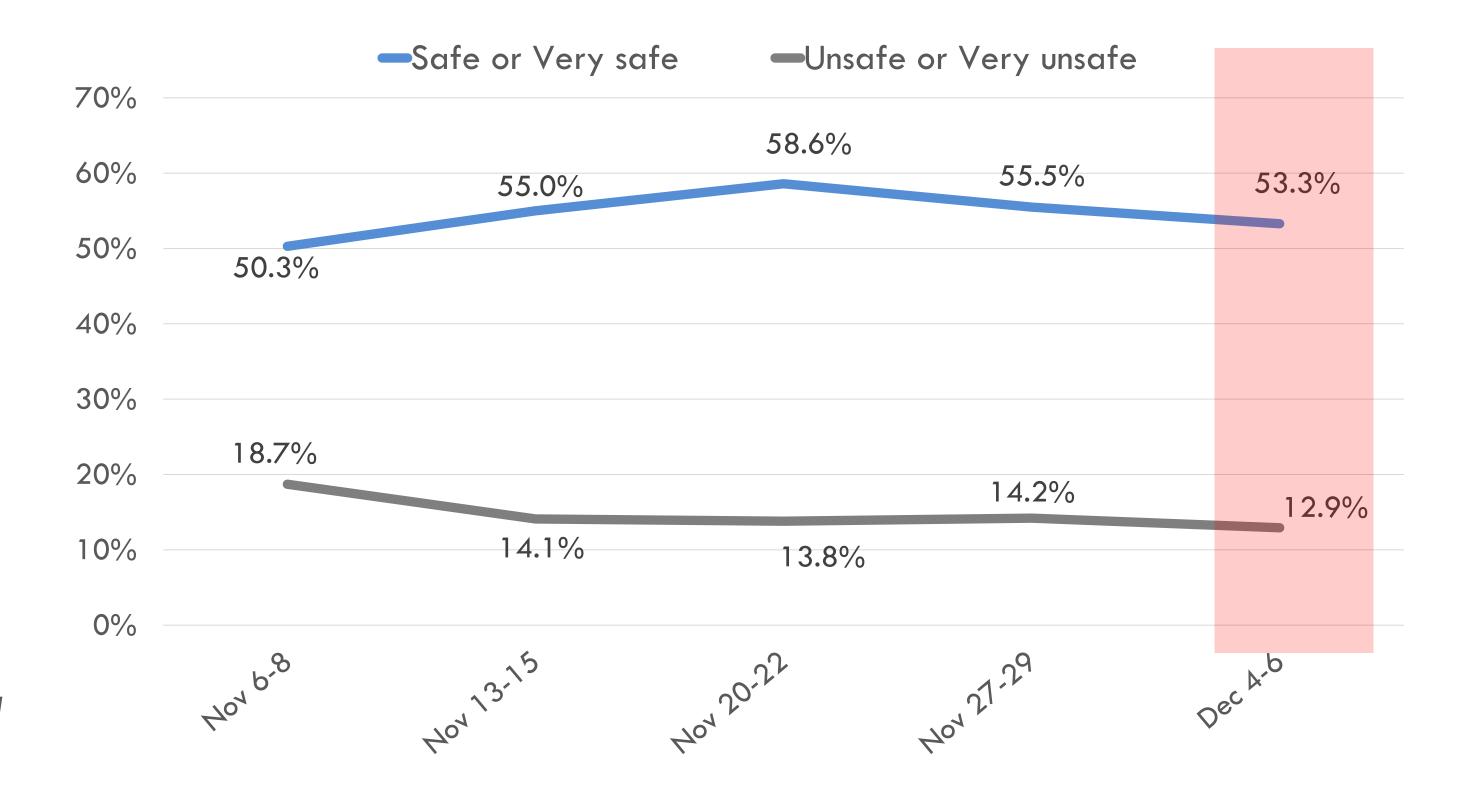
## SAFETY OF COVID-19 VACCINES

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



(Base: Wave 35-39 data. All respondents, 1,205, 1,206, 1,205, 1,205 and 1,204 completed surveys.)

#### Historical data

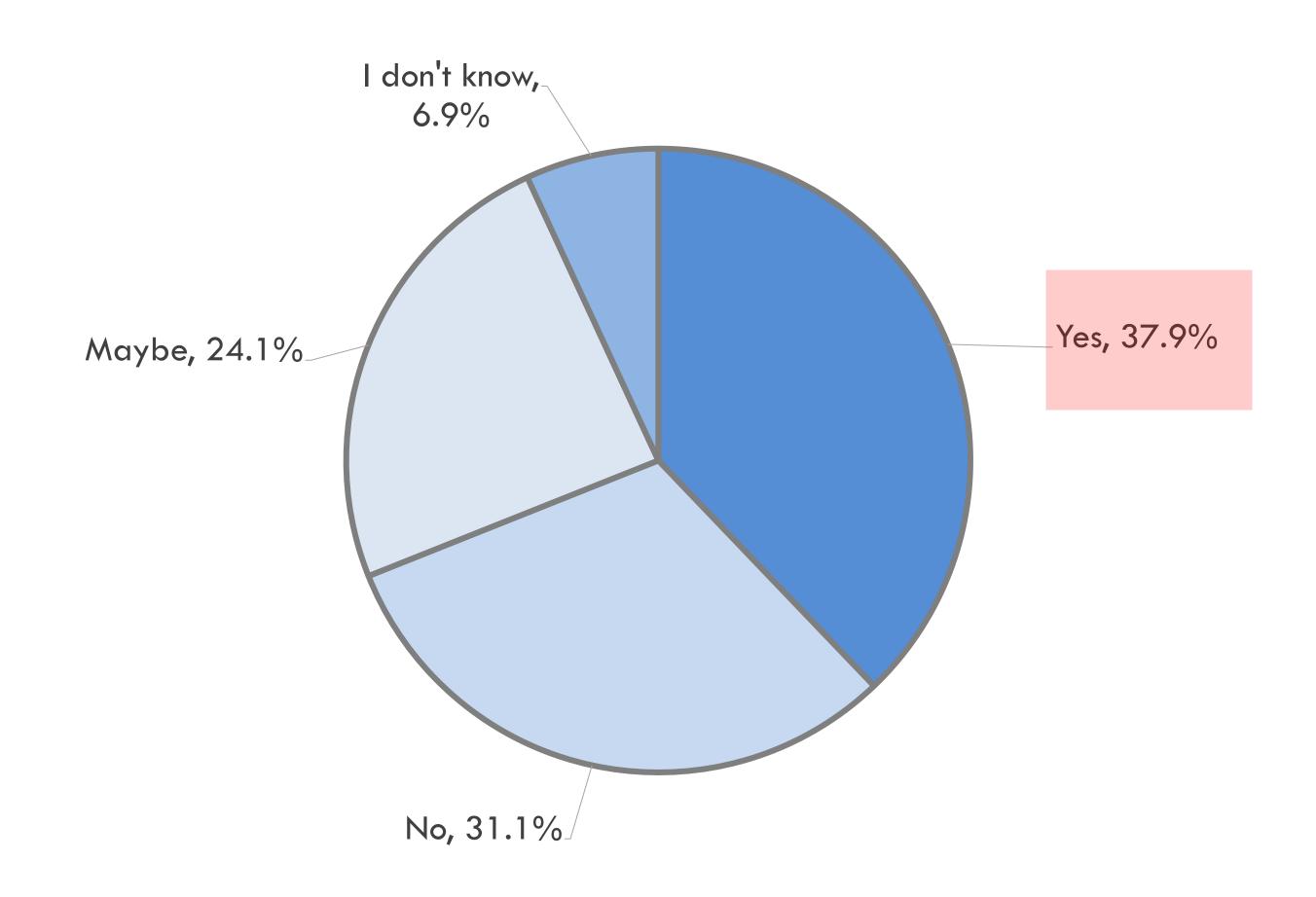




## VACCINATION FOR SCHOOL-AGED CHILDREN

Question: In the scenario above, will you get your children vaccinated? (Select one)

(Base: Wave 39 data. Respondents who are parents to school-aged children who travel with them at least once a year, 352 completed surveys. Data collected Dec 4-6, 2020)



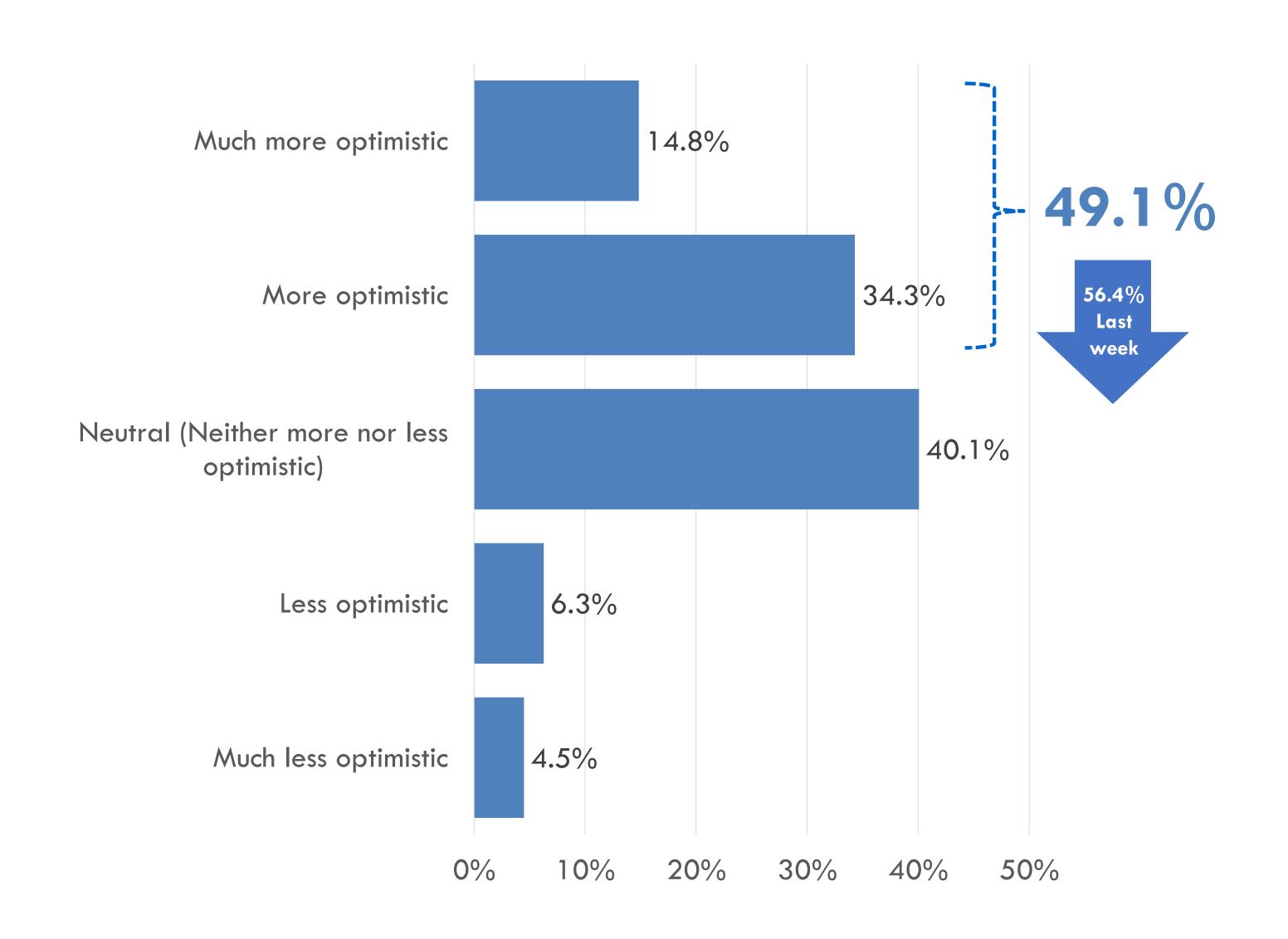


## VACCINES AND EXPECTED RETURN TO NORMALCY

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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



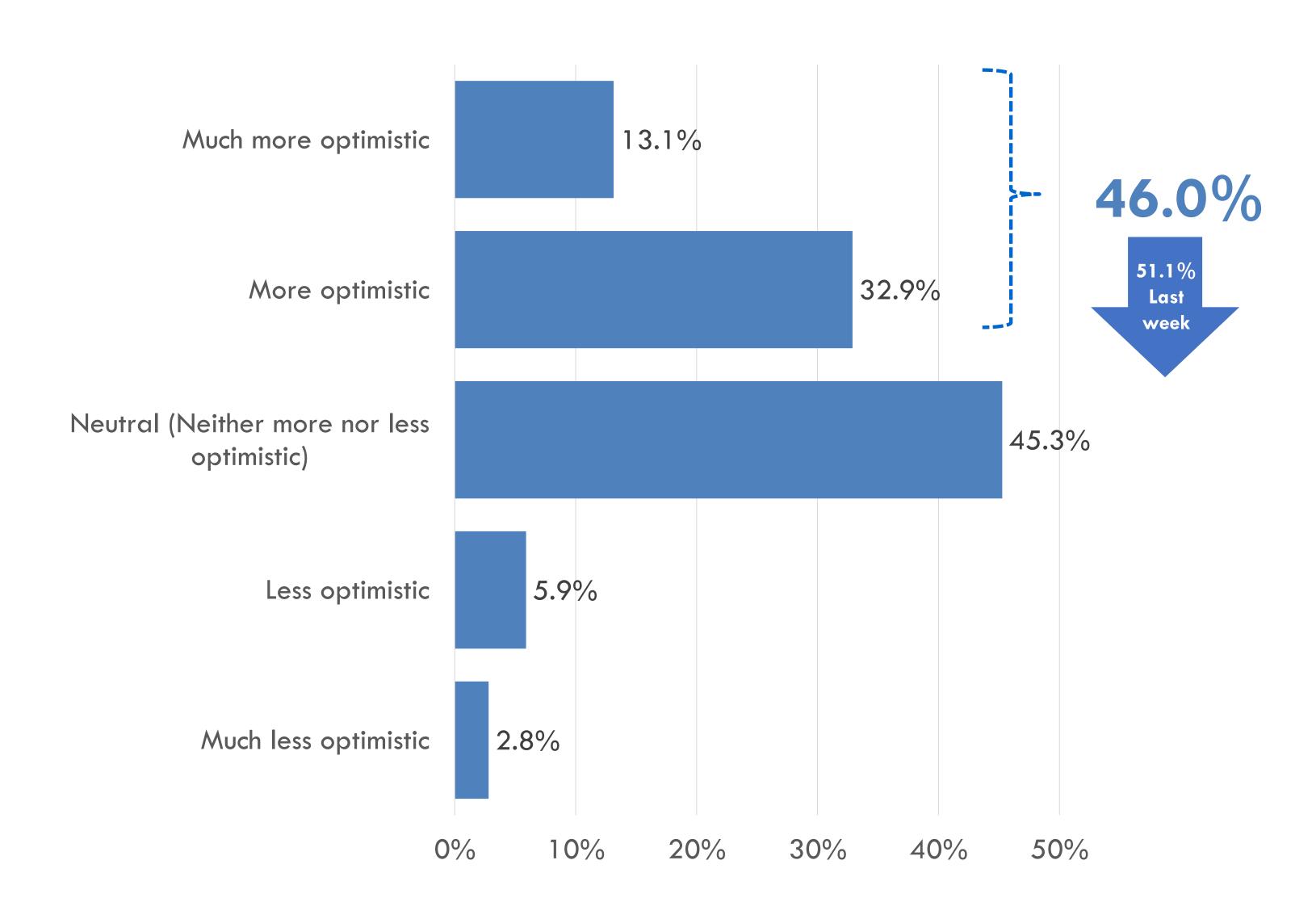


#### VACCINES AND EXPECTED RETURN TO TRAVEL SAFELY

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 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)







# Key Takeaways

- The gloominess combined with more clarity on timelines for production and distribution appear to have muted the some of the strong optimism initially felt about a COVID vaccine. After Pfizer's announcement, specifically about if things will be back to normal and travel can be done safe from the virus within the next 6 months
- Just under 45% of American travelers say they definitively plan on getting the COVID vaccine right now. The primary objections to getting vaccinated are concerns about the vaccine's safety



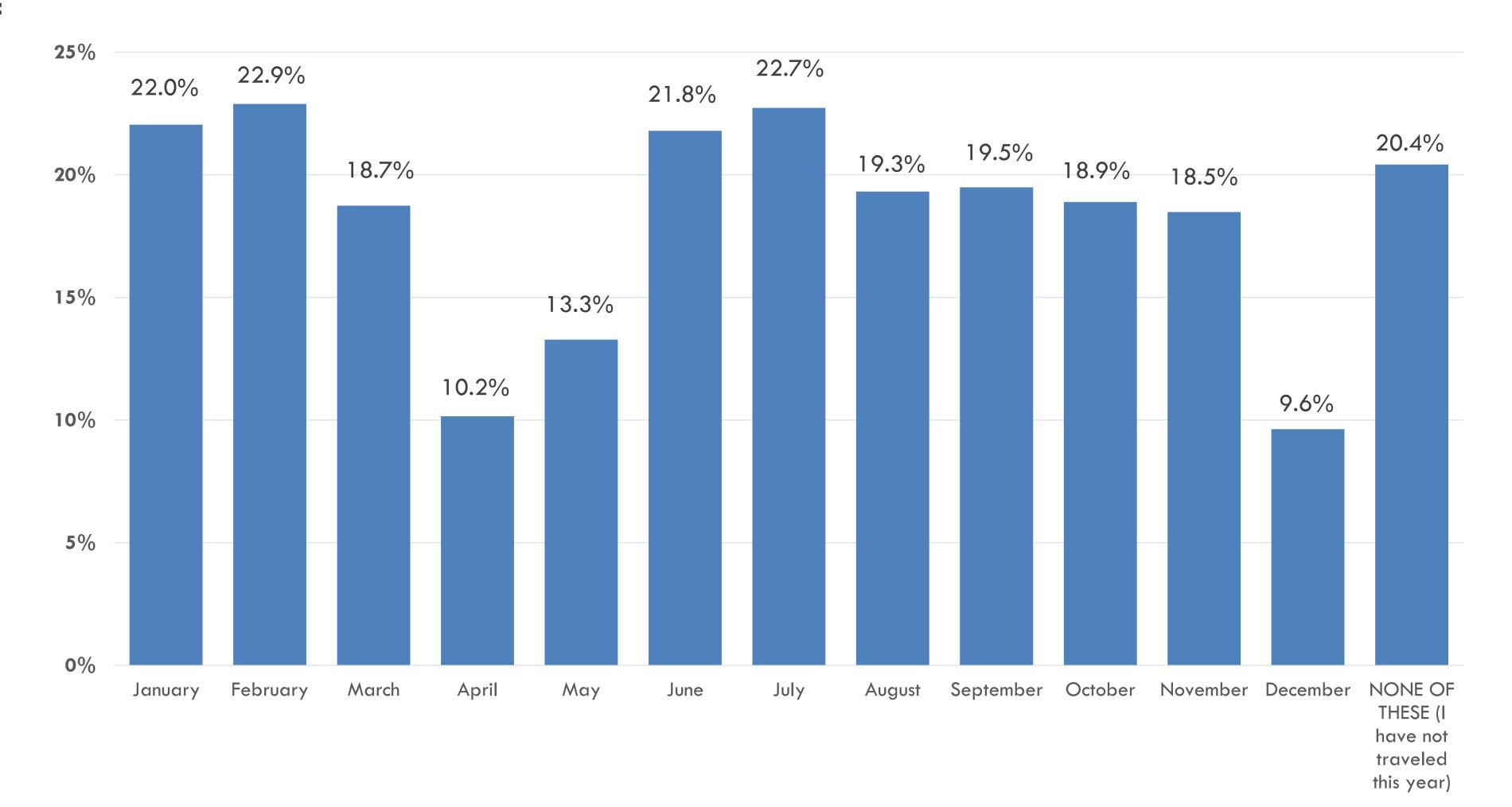


### MONTHS OF TRAVEL IN 2020

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

(Base: Wave 39 data. All

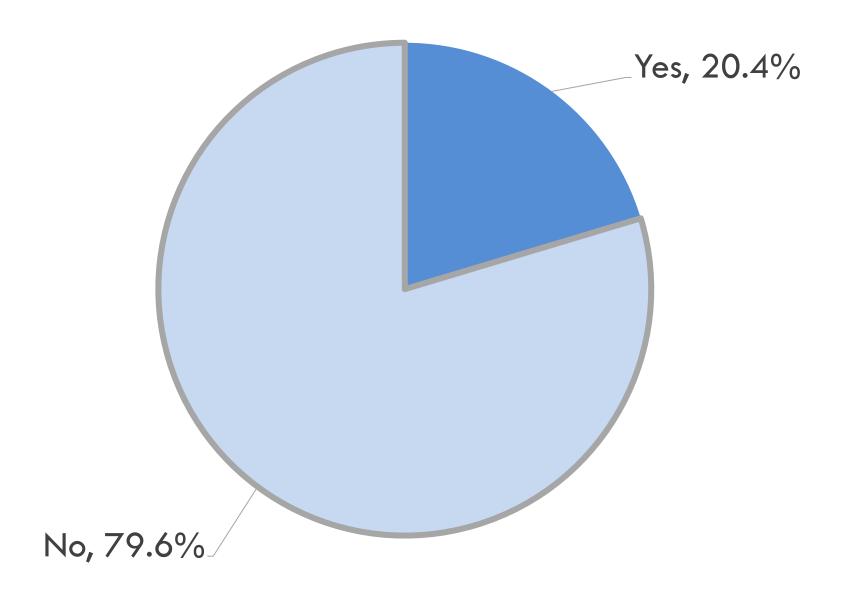
respondents, 1,204 completed surveys.



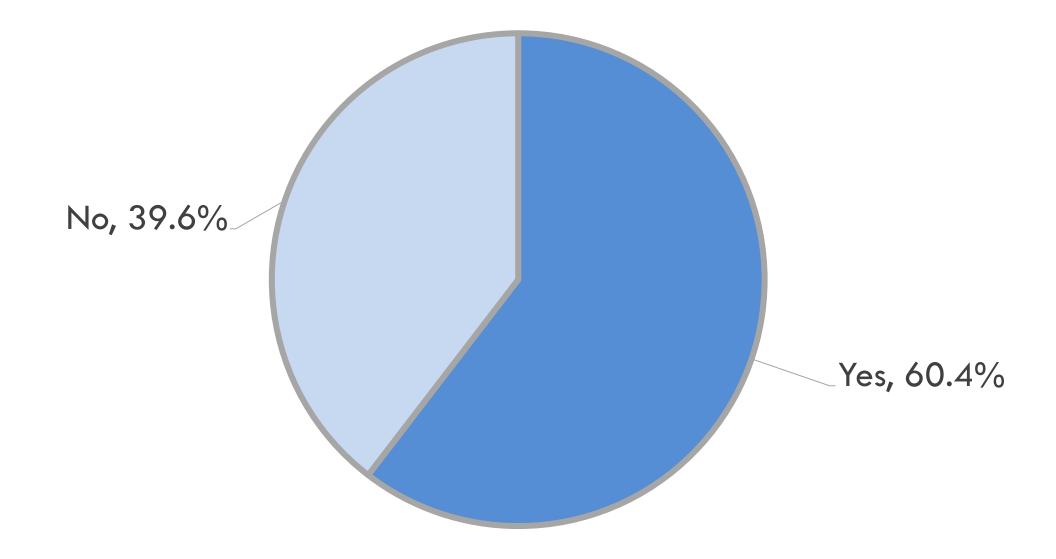


## ROAD & AIR TRAVEL DURING THE PANDEMIC

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



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



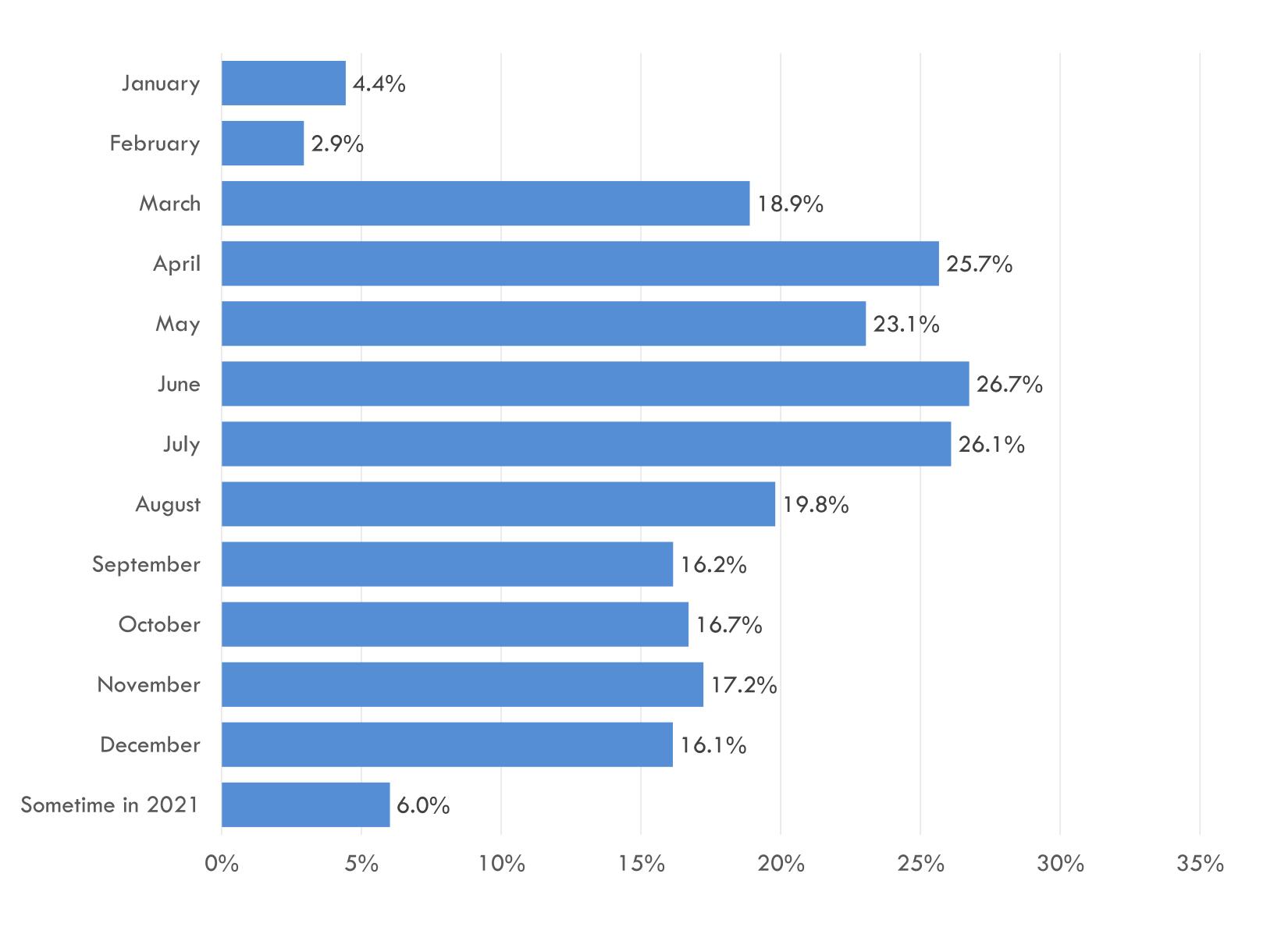
(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected Dec 4-6, 2020)



#### MONTH OF TRIP CANCELLATION

Question: The trip(s) you CANCELED would have taken place in which months? (Select all that apply)

(Base: Wave 39 data. Respondents cancelling a trip, 570 completed surveys. Data collected Dec 4-6, 2020)





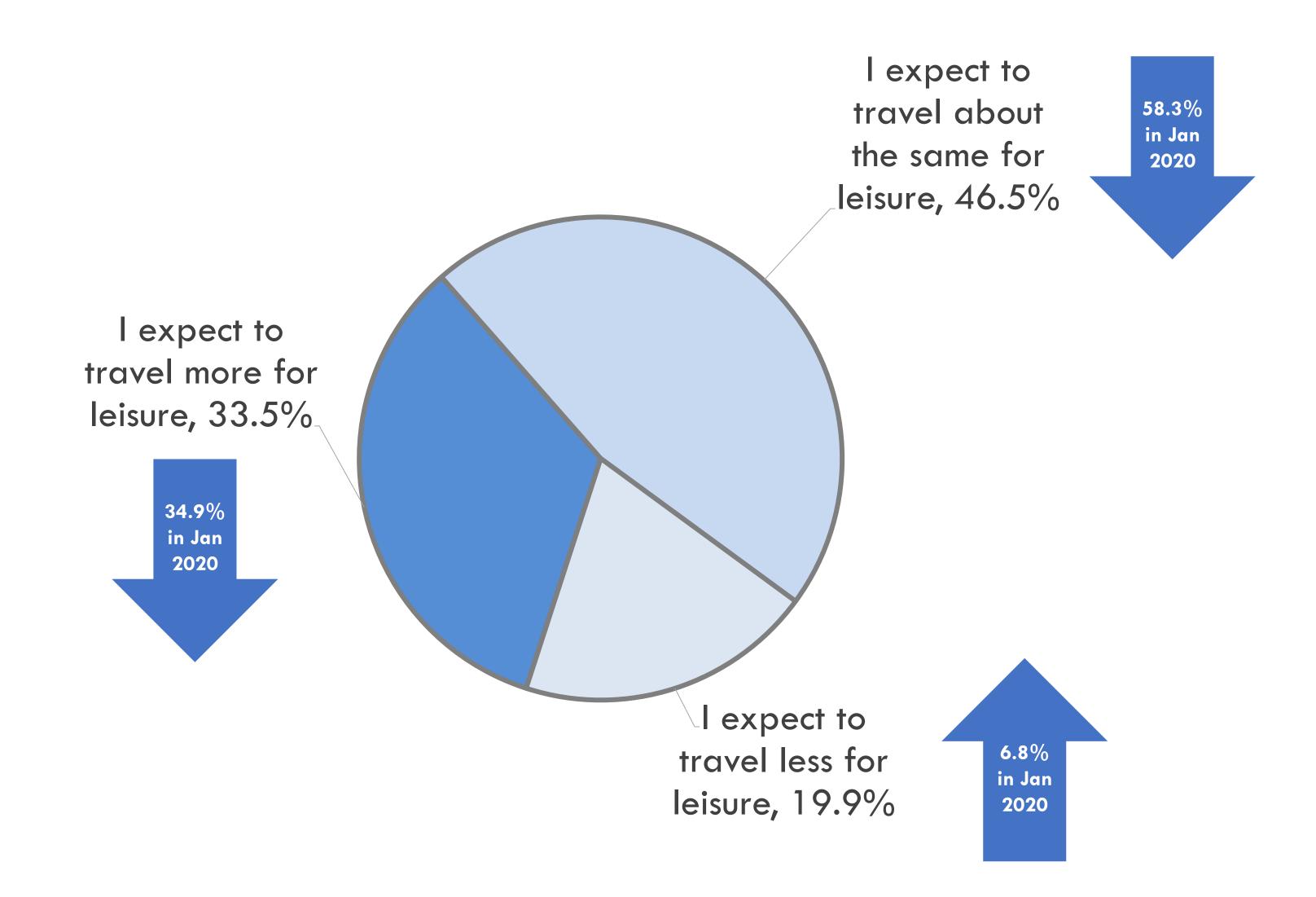


## EXPECTED TRAVEL CHANGES IN 2021

Question: NEXT YEAR (2021), do you expect to travel more or less for leisure than you did this year (2020)? (Select one)

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.



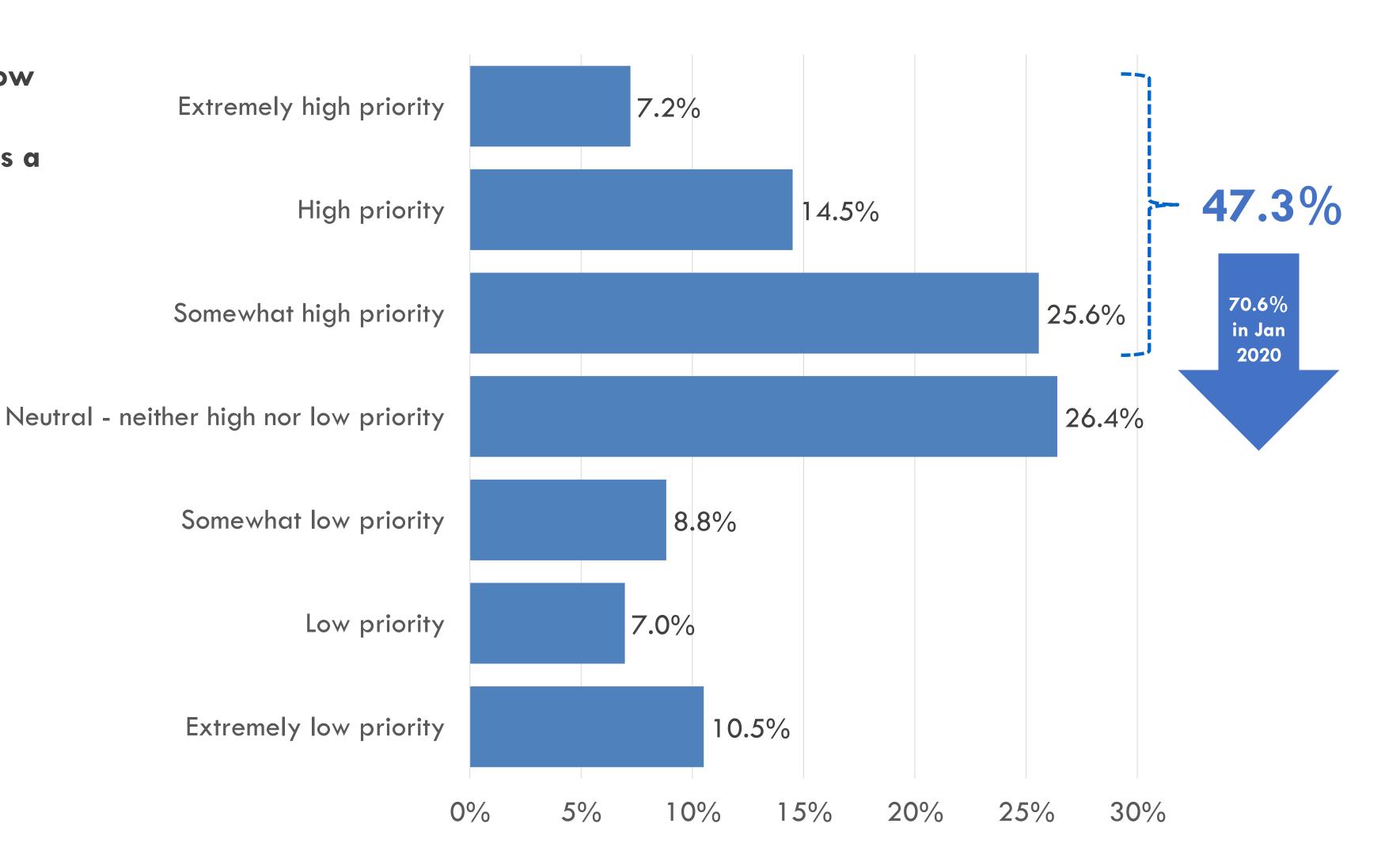


#### LEISURE TRAVEL AS A SPENDING PRIORITY

Question: Thinking carefully about how you expect to spend your income in 2021, please describe leisure travel as a spending priority. (Select one)

Leisure travel will be a in 2021

(Base: Wave 39 data. All respondents, 1,204 completed surveys.



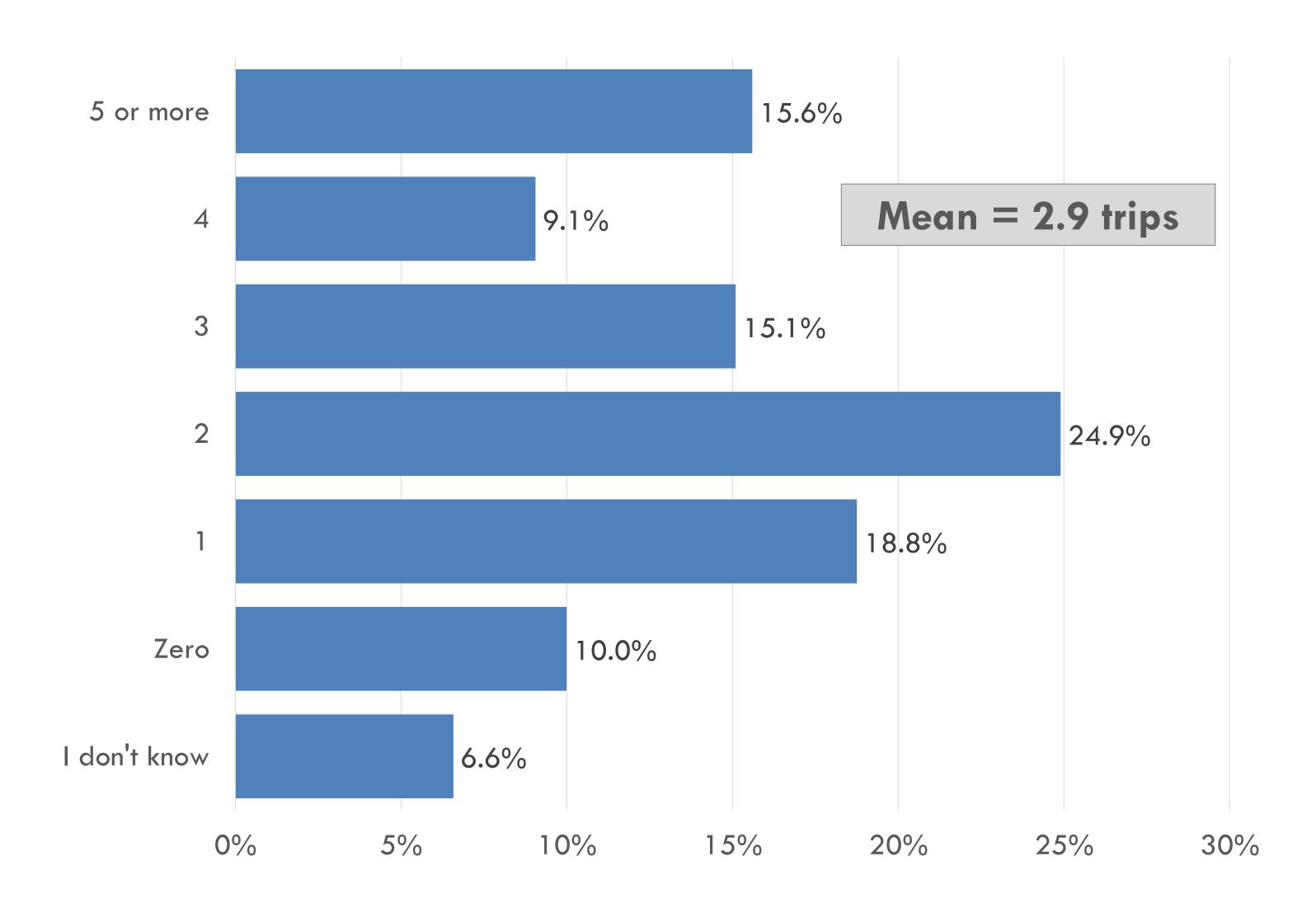


## LEISURE TRIPS EXPECTED IN 2021

Question: How many leisure trips will you likely take next year (2021)? (Select one)

(Base: Wave 39 data. All

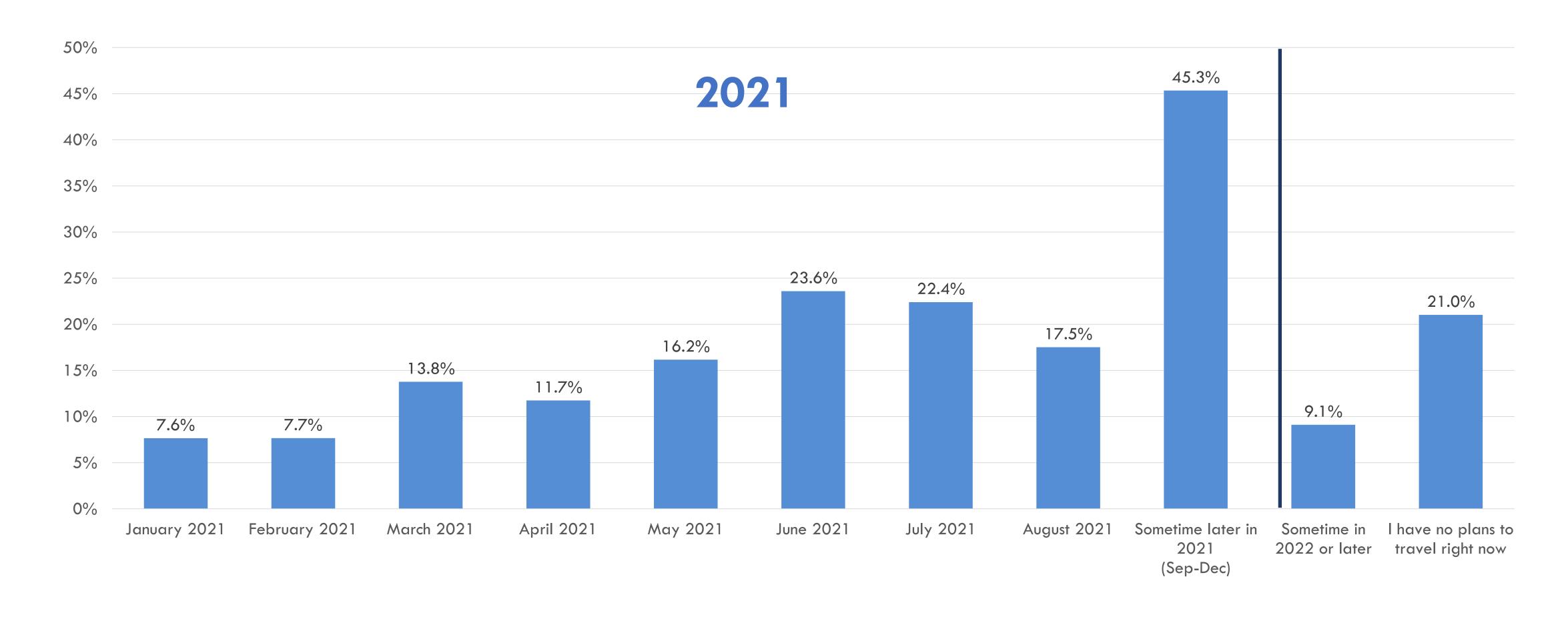
respondents, 1,204 completed surveys.





#### UPCOMING TRAVEL PLANS

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



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

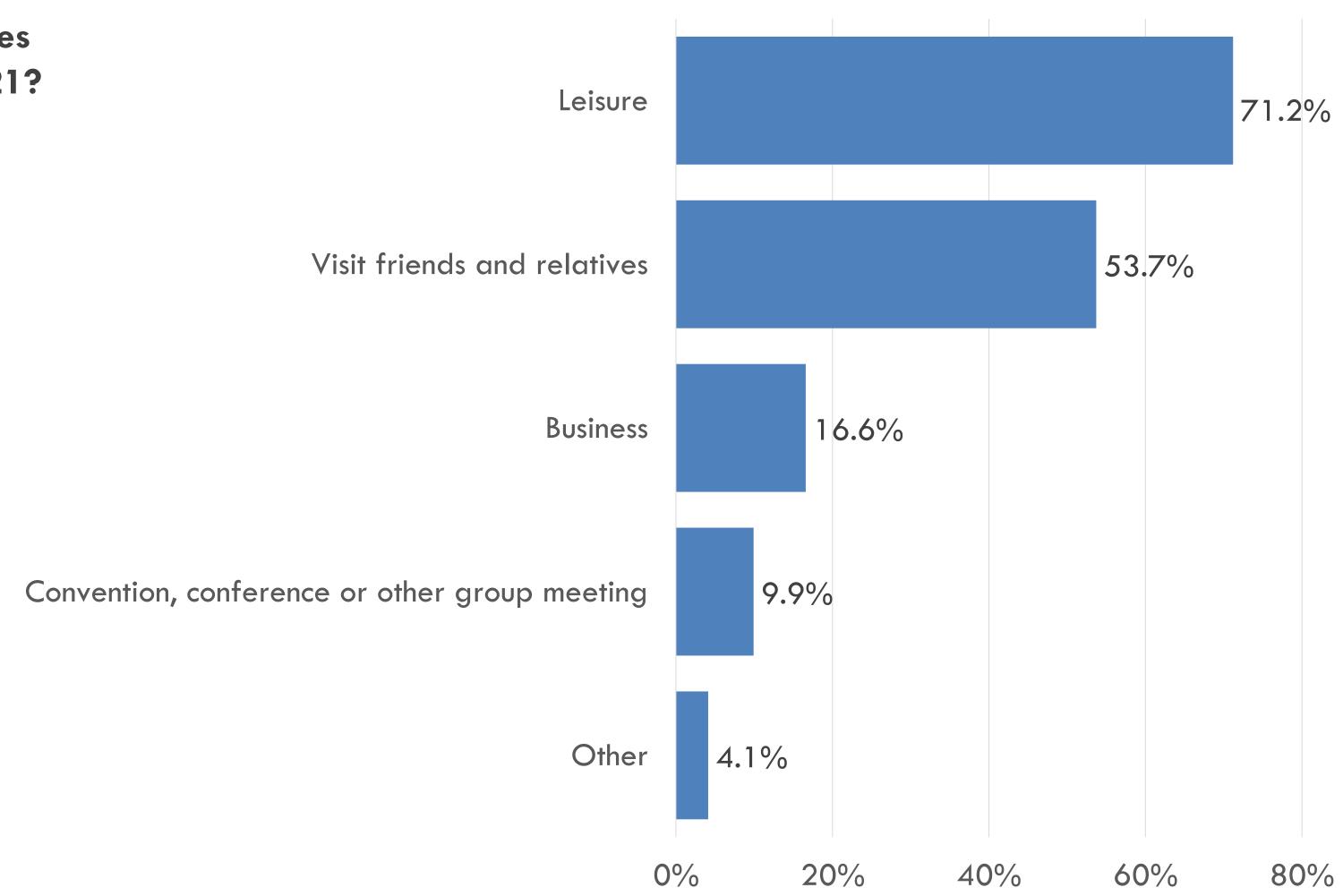


## TYPE OF TRIPS EXPECTED IN 2021

Question: Which of the following types of travel are you likely to take in 2021?

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.



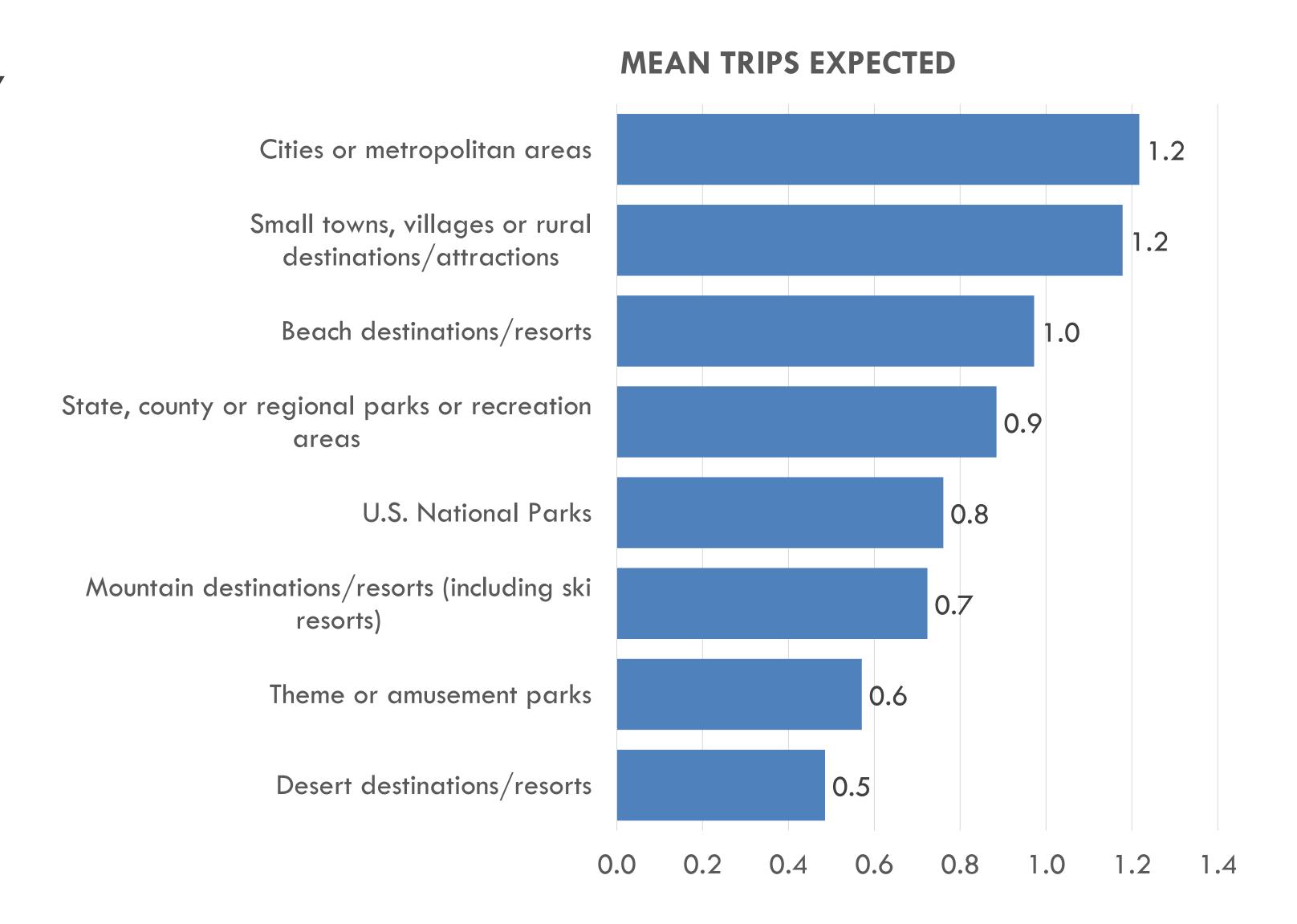


#### DESTINATION TYPES EXPECTED IN 2021

Question: Next year (2021), HOW MANY OF YOUR LEISURE TRIPS will likely include the following types of destinations?

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.

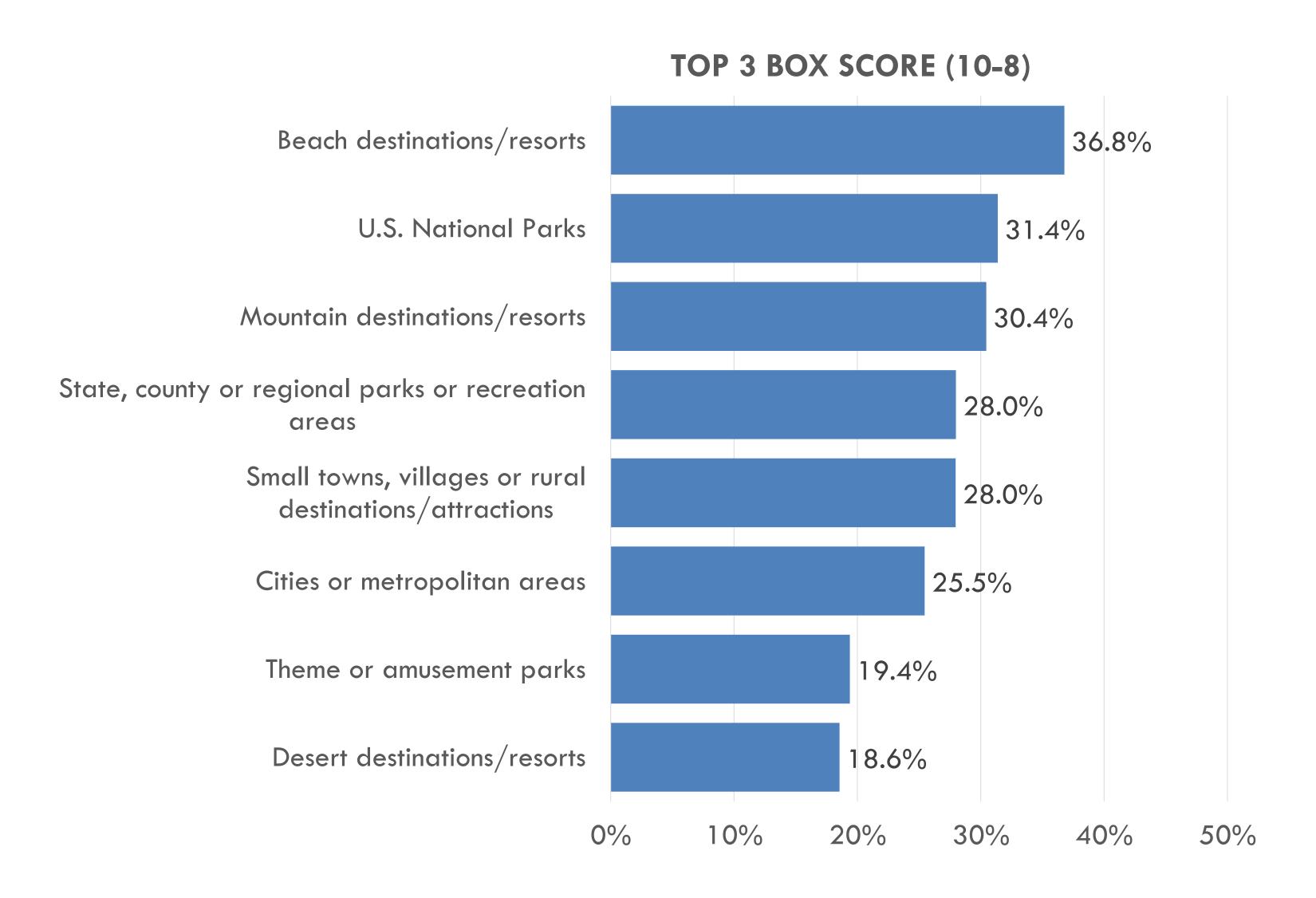




#### EXCITEMENT TO VISIT DESTINATION TYPES IN 2021

Question: Thinking carefully about NEXT YEAR (2021). Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year.

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



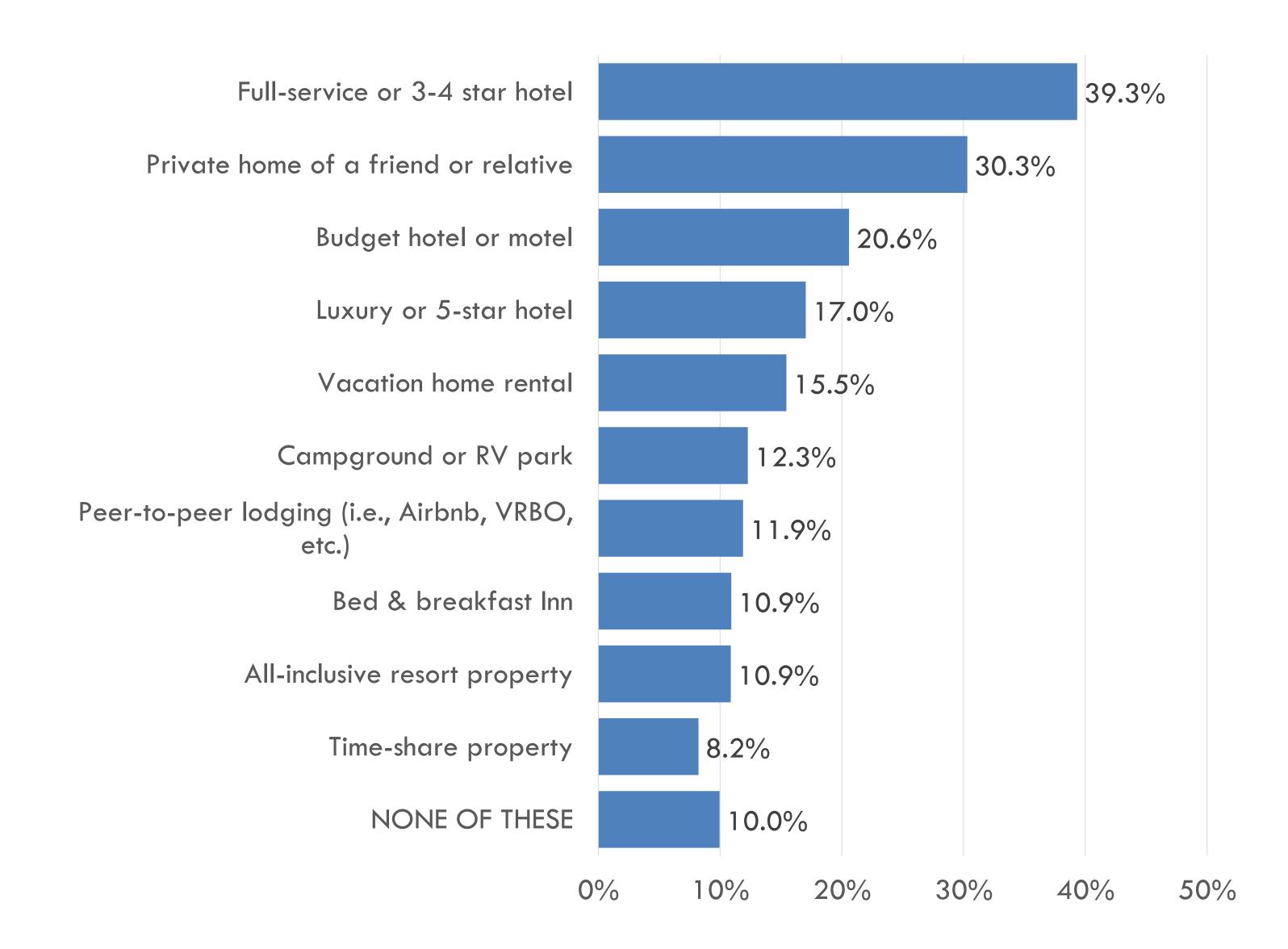


#### PLACES OF STAY EXPECTED IN 2021

Question: In which of the following will you stay overnight at during any of your 2021 trips? (Select all that apply)

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.





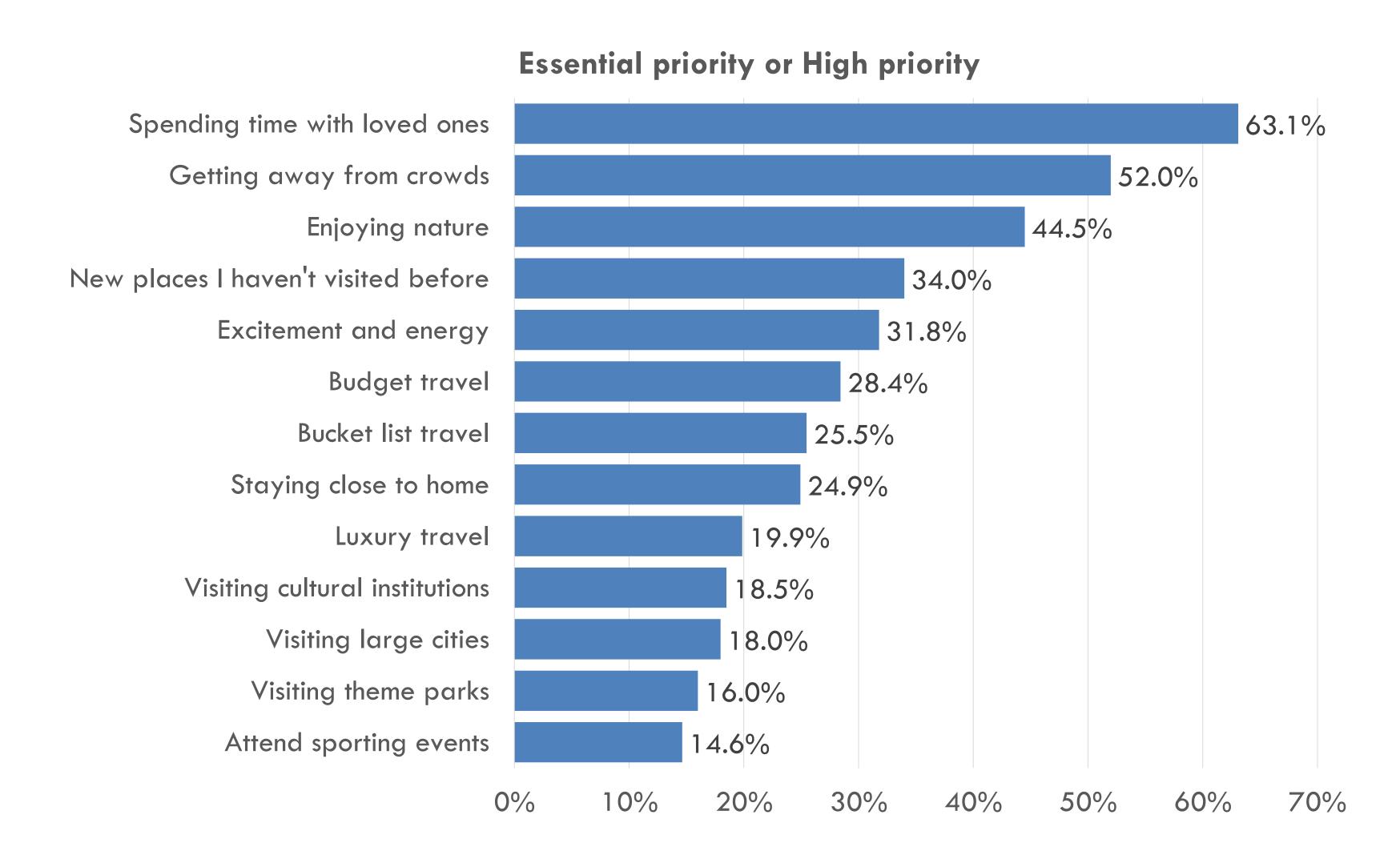




#### PRIORITIZATION OF TRAVEL EXPERIENCES IN 2021

Question: Thinking about your travel during 2021, what travel experiences will you prioritize? However you personally define each, use the scale provided to indicate how you will prioritize them.

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



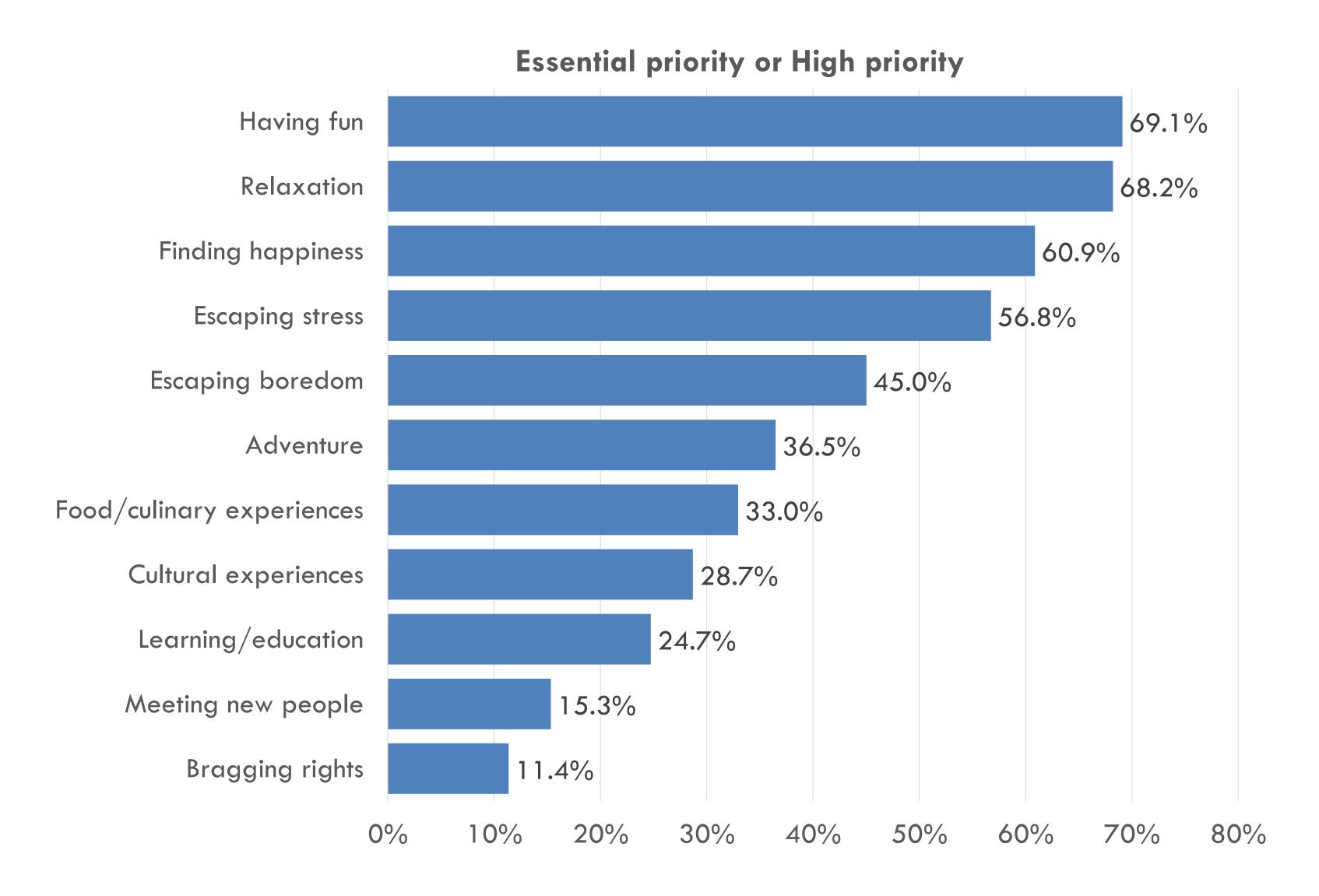


#### PRIORITIZATION OF TRAVEL EXPERIENCES IN 2021

Question: Continuing this line of thought: Thinking about your travel during 2021, what travel experiences will you prioritize? However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.



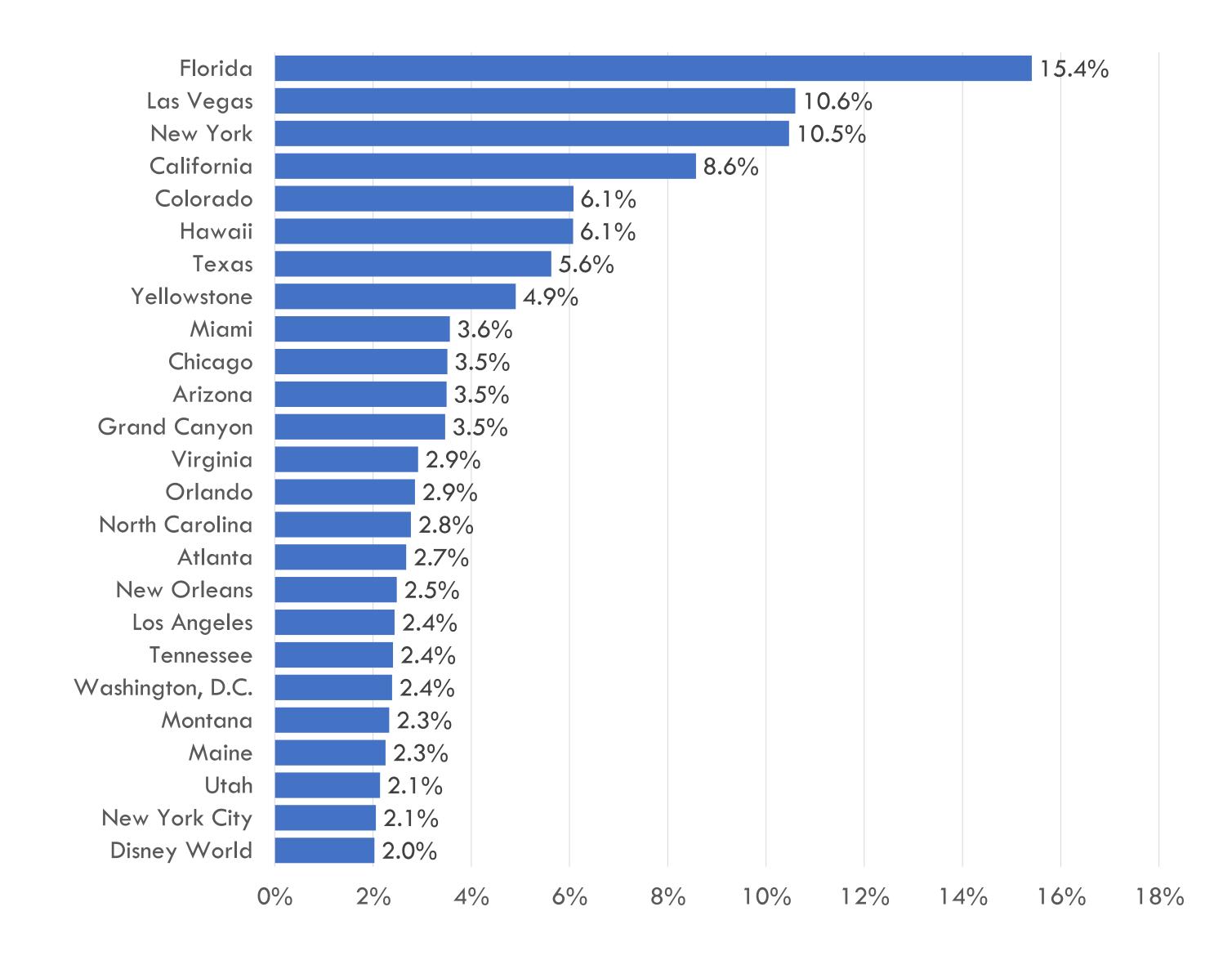


#### DOMESTIC DESTINATIONS PLANNED FOR IN 2021

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

(Base: Wave 39 data. All

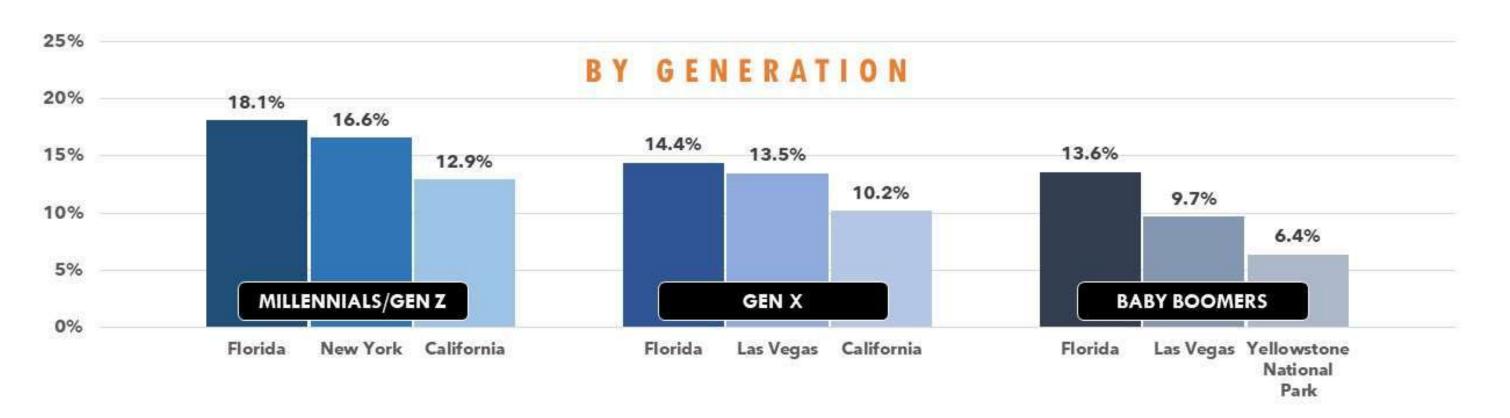
respondents, 1,204 completed surveys.

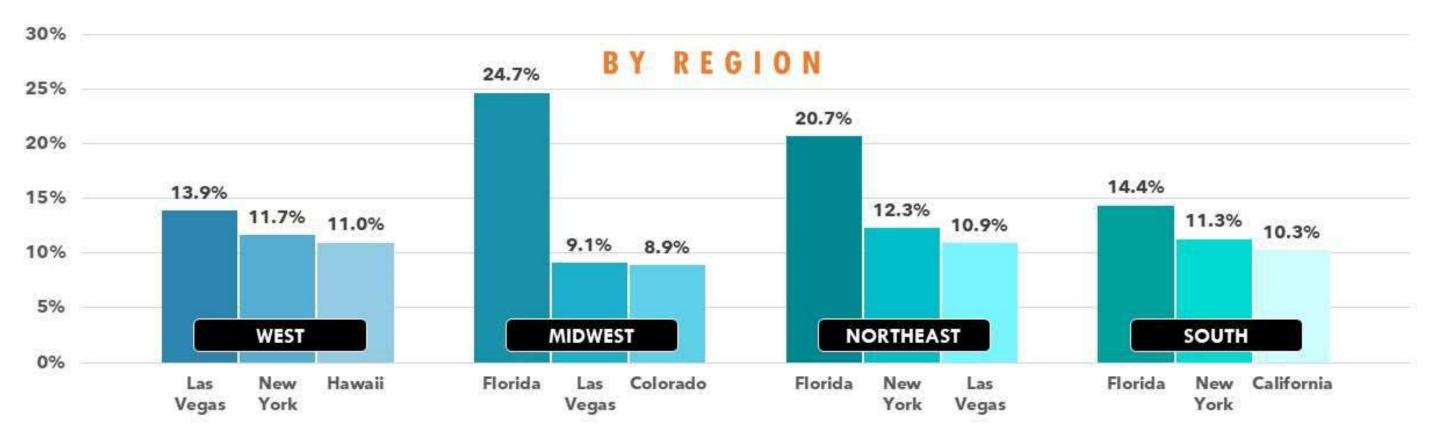




#### AMERICANS' TOP DESTINATIONS FOR 2021

#### AS OF DECEMBER 6TH





QUESTION: WHICH DOMESTIC DESTINATIONS (IF ANY) ARE YOU PLANNING TO VISIT OR CONSIDERING VISITING NEXT YEAR (2021)? (WRITE IN UP TO YOUR TOP 3)

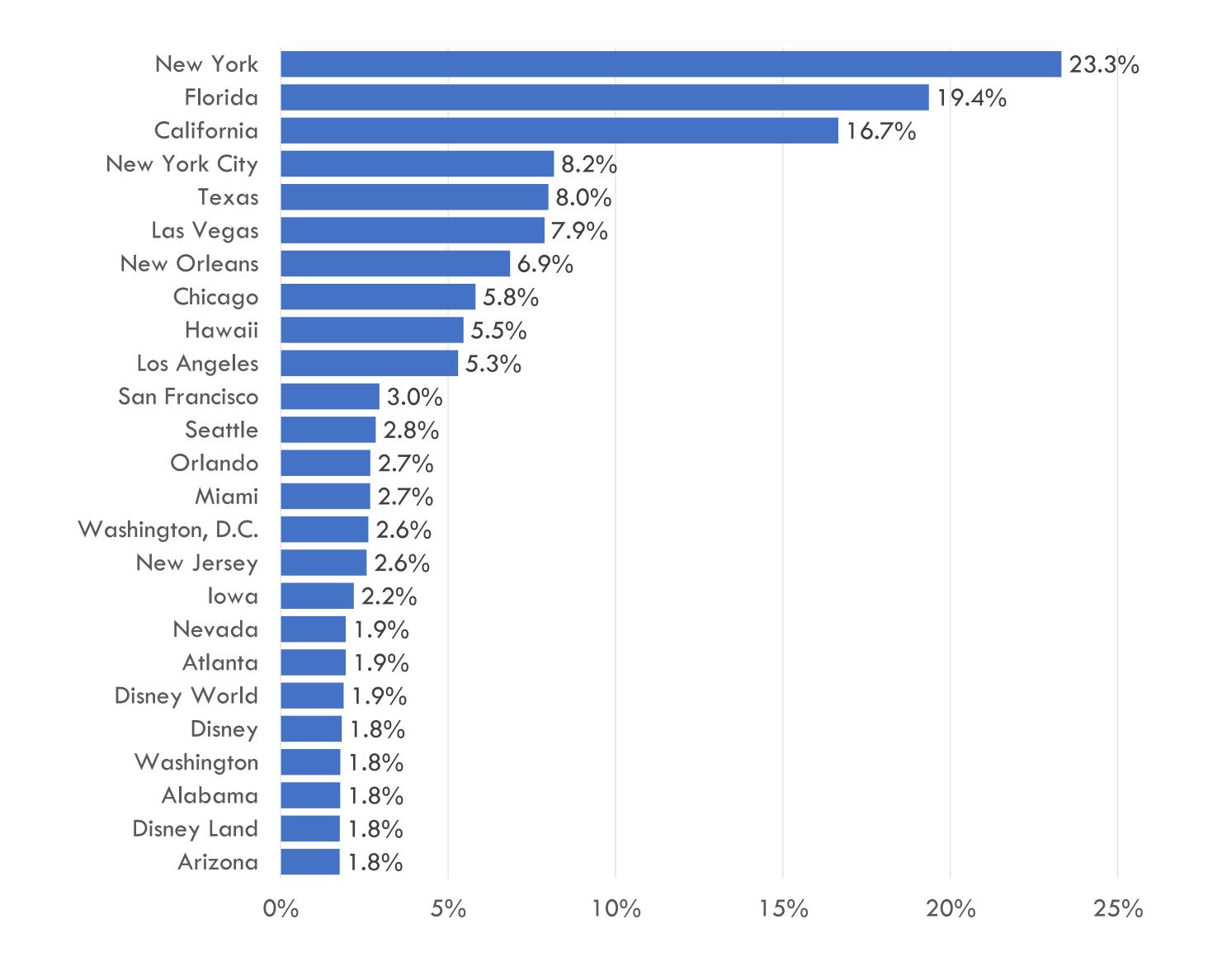
Destination Analysts
DO YOUR RESEARCH

#### DOMESTIC DESTINATION TO BE AVOIDED DUE TO COVID-19

Question: Are there any destinations you would like to visit, but will AVOID next year due to the COVID-19 situation? (Write in as many as 3)

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.



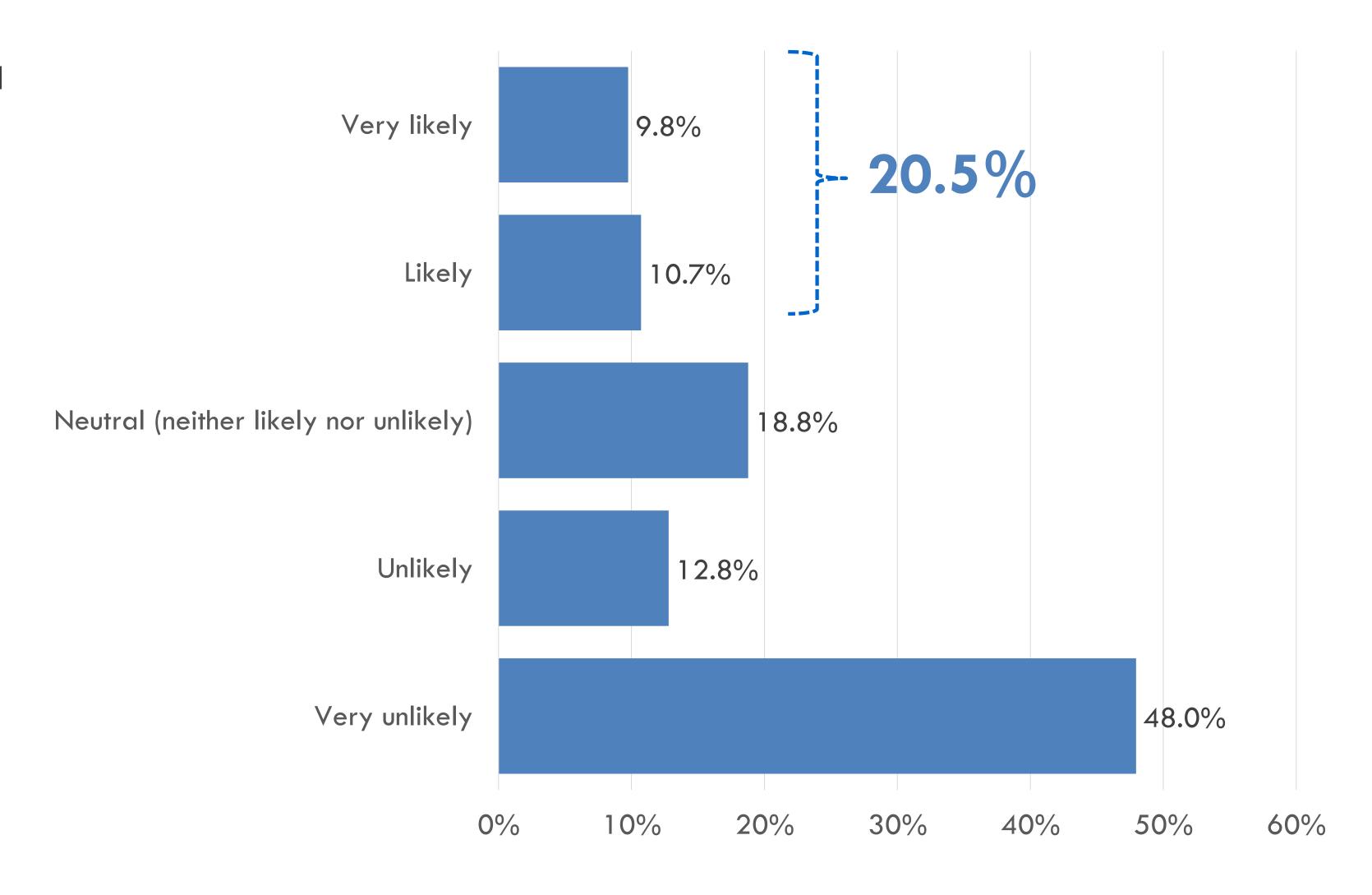


#### LIKELIHOOD TO TRAVEL ABROAD IN 2021

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.



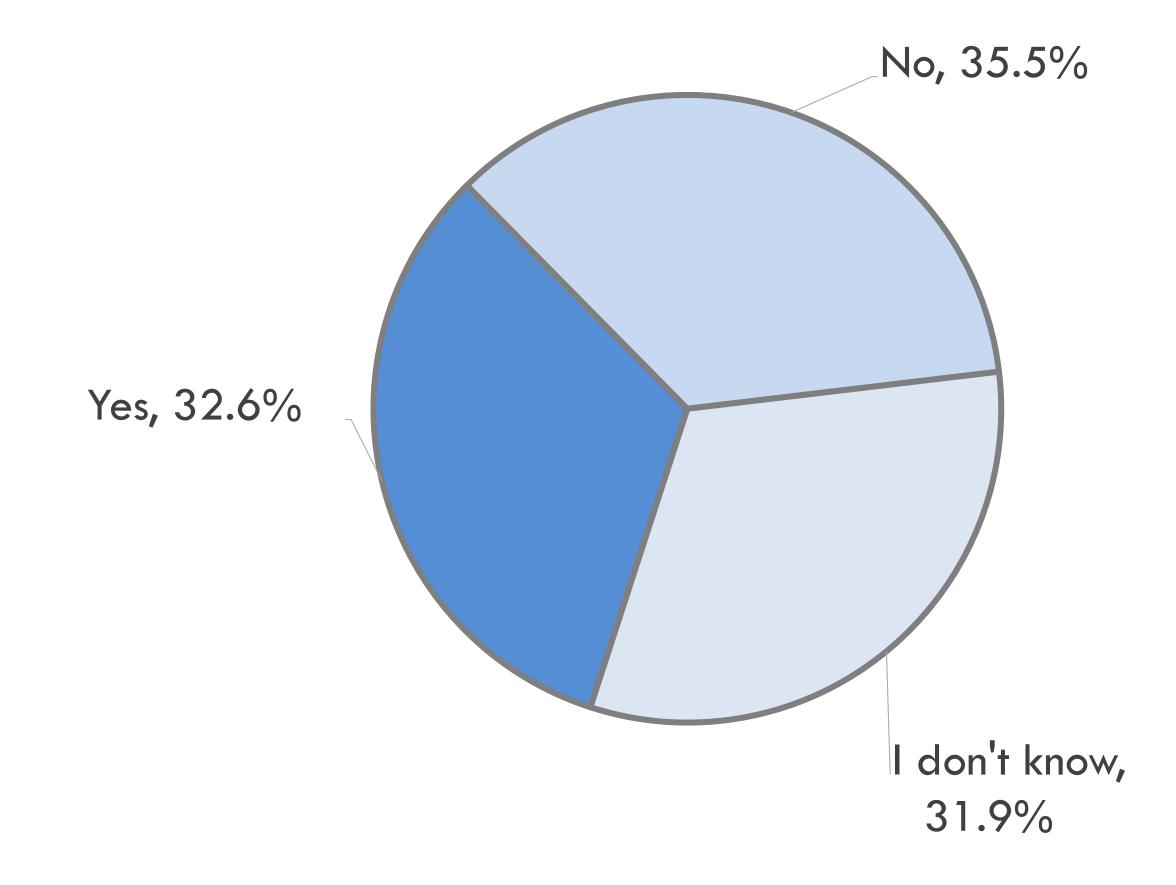


# LIKELIHOOD OF TAKING A STAYCATION IN 2021

# Question: Are you likely to take any STAYCATIONS during 2021?

(Base: Wave 39 data. All

respondents, 1,204 completed surveys.





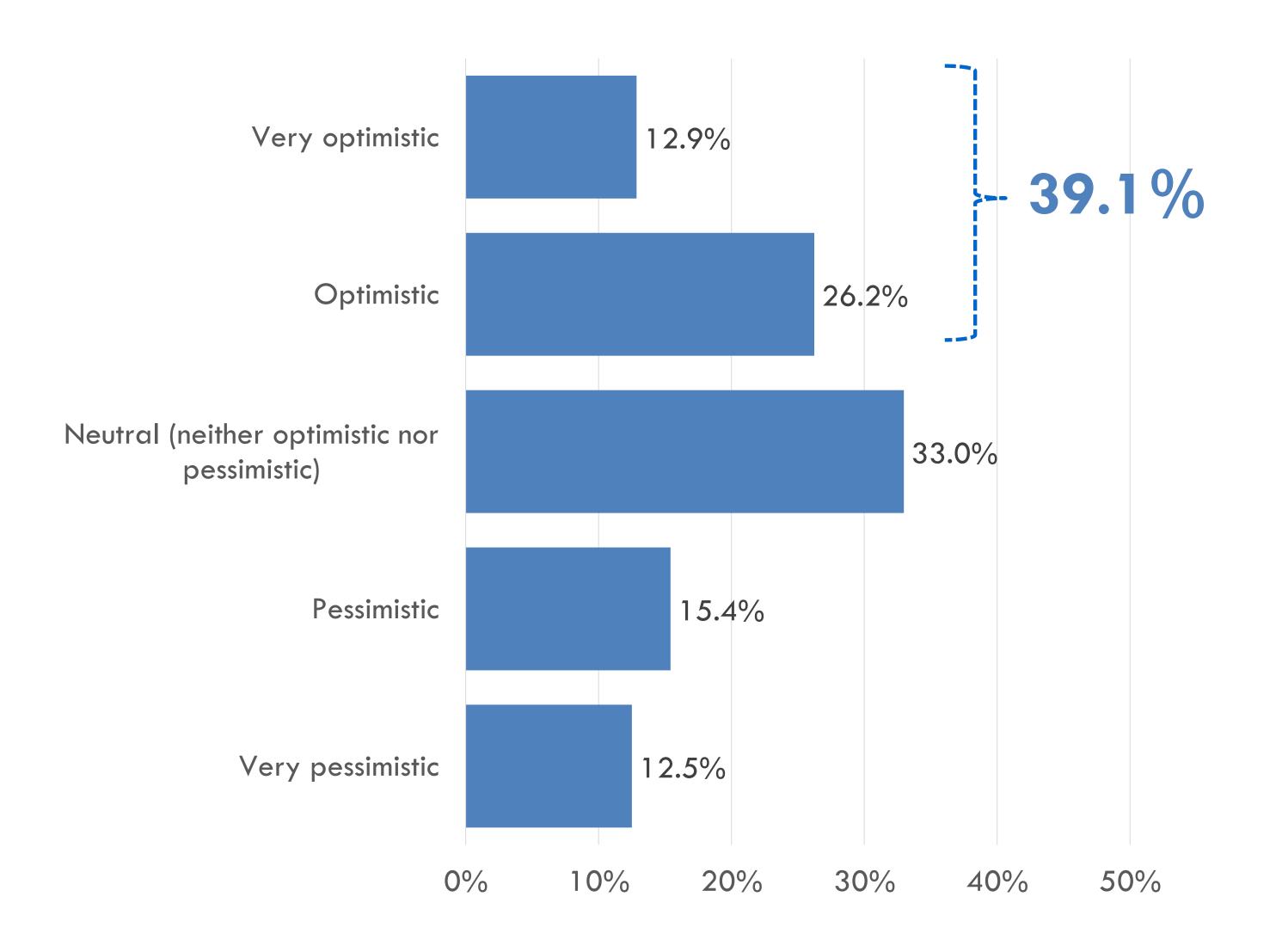


## OPTIMISM FOR SPECIAL EVENTS IN 2021

Question: How optimistic are you that you will be able to attend SPECIAL EVENTS (music festivals, other festivals, parades, etc.) in 2021. (Select one that best completes the sentence)

l am \_\_\_\_\_ that I will attend special events in 2021.

(Base: Wave 39 data. Respondents traveling to attend a special event in the past 2 years, 363 completed surveys. Data collected December 4-6, 2020)



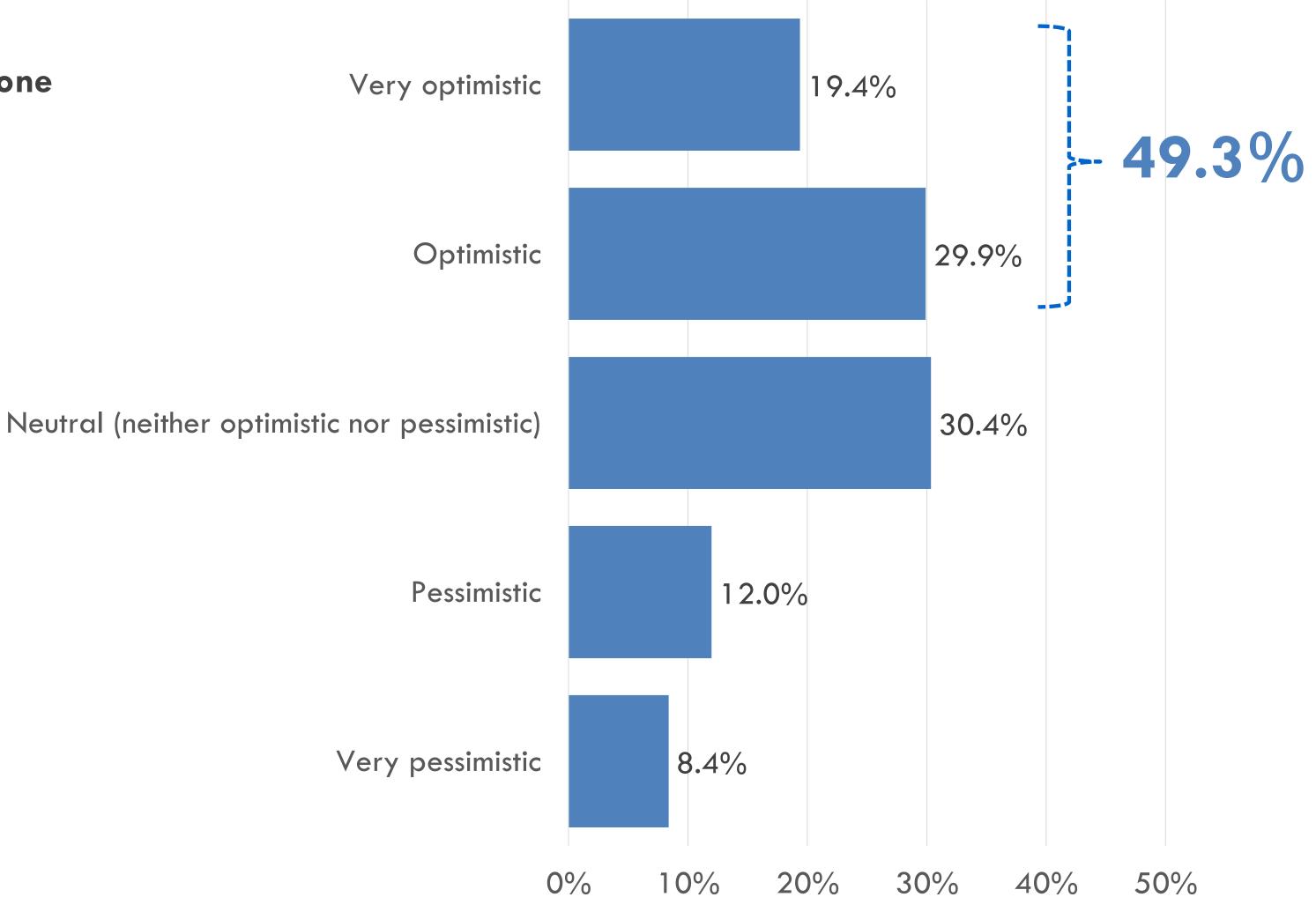


#### OPTIMISM FOR SPORTING EVENTS IN 2021

Question: How optimistic are you that you will be able to attend SPORTING EVENTS in 2021. (Select one that best completes the sentence)

l am \_\_\_\_\_ that I will attend sporting events in 2021.

(Base: Wave 39 data. Respondents traveling to attend a sporting event in the past 2 years, 340 completed surveys. Data collected December 4-6, 2020)



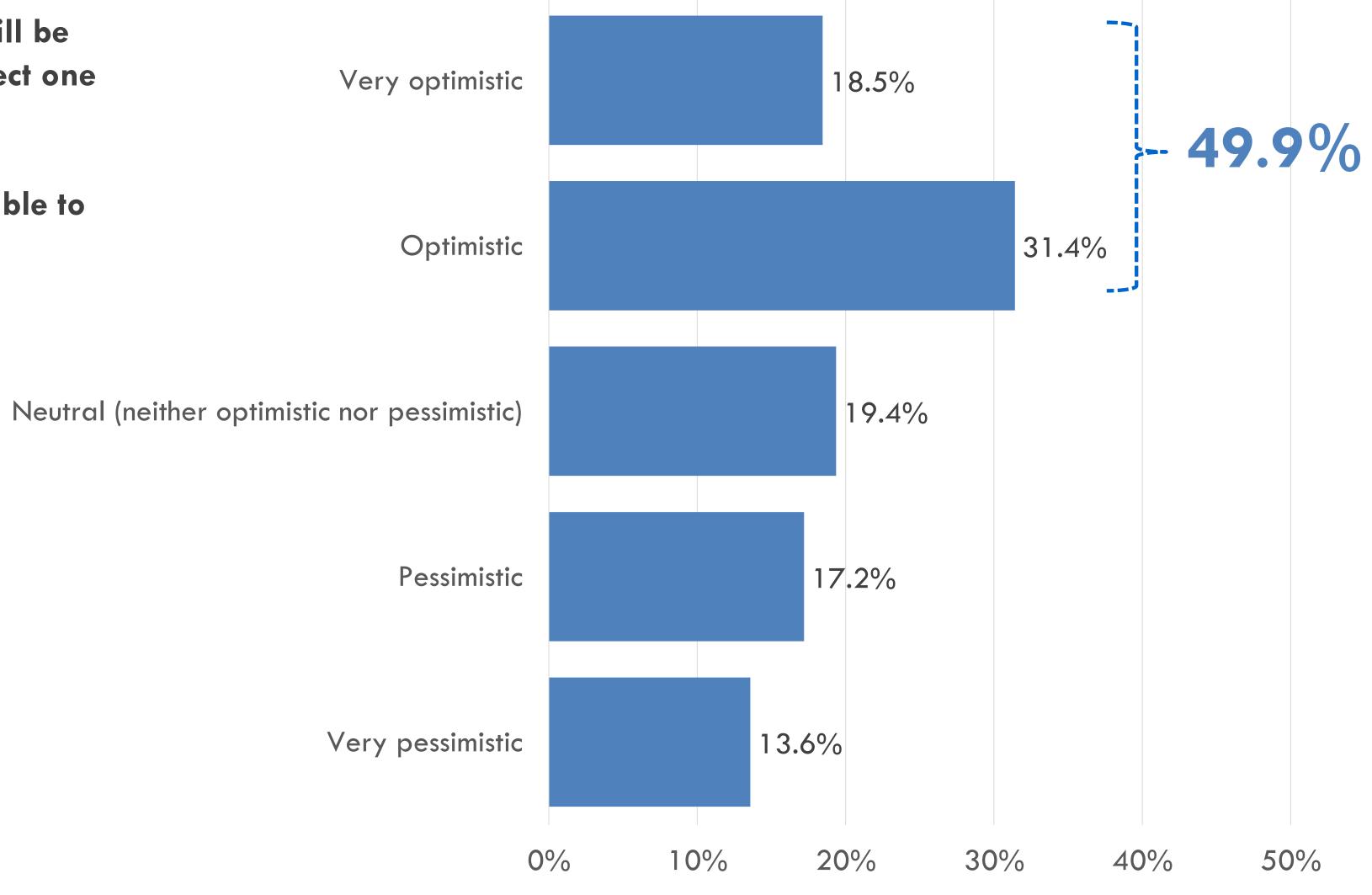


#### OPTIMISM FOR CRUISE TRAVEL IN 2021

Question: How optimistic are you that you will be able to TRAVEL BY CRUISE LINE in 2021. (Select one that best completes the sentence)

travel by cruise line in 2021.

(Base: Wave 39 data. Respondents taking a cruise trip in the past 2 years, 198 completed surveys. Data collected December 4-6, 2020)



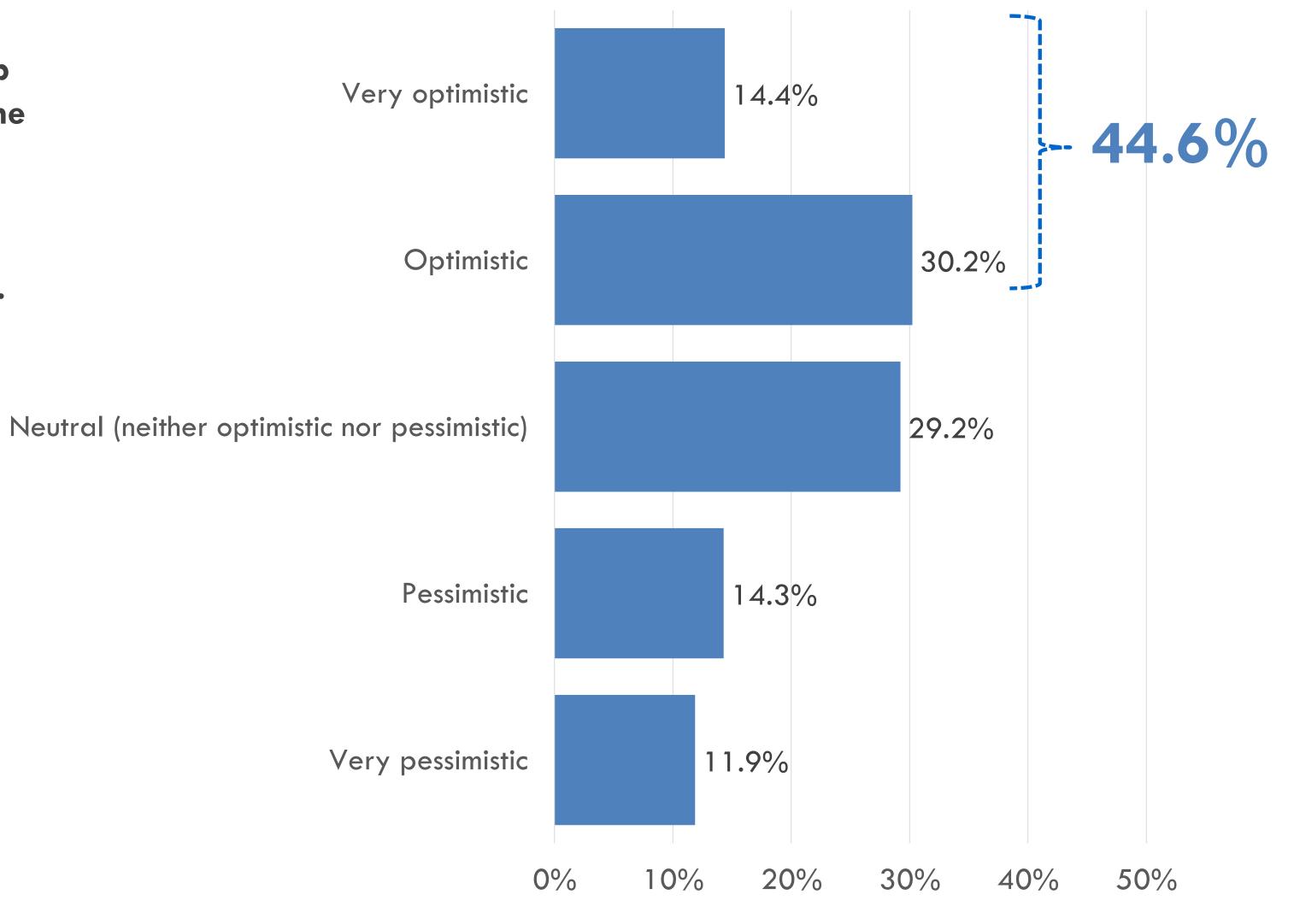


#### OPTIMISM FOR GROUP MEETINGS IN 2021

Question: How optimistic are you that you will be able to attend any conventions, conferences or group meetings in 2021? (Select one that best completes the sentence)

l am \_\_\_\_\_ that I will attend conventions, conferences or group meetings in 2021.

(Base: Wave 39 data. Respondents traveling to attend a convention, conference or group meeting in the past 2 years, 318 completed surveys. Data collected December 4-6, 2020)







# Key Takeaways

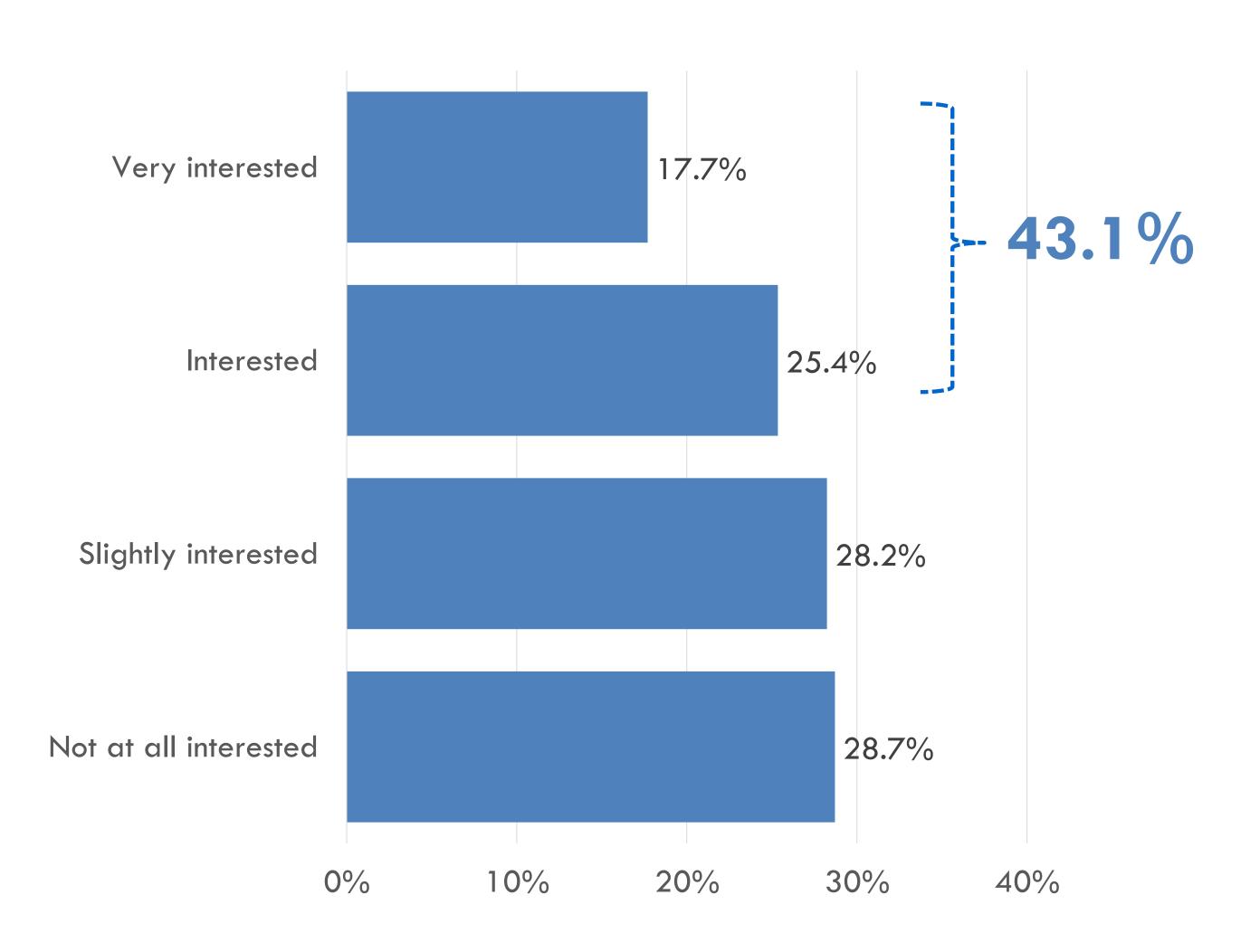
- The majority of American travelers took at least one trip in 2020, with June and July incurring the highest rates of travel post onset of the coronavirus
- Americans expect to take 3 trips in 2021 on average. A smaller proportion will prioritize leisure travel in their personal budget compared to pre-pandemic times
- Travelers want to have, and will prioritize, 2021 experiences that are fun and relaxing
- Florida, New York, Las Vegas and California look to remain tourism powerhouses, although those in different generations and regions of the country have various travel tastes
- American travelers are optimistic about specific types of travel, including to special events, sporting events and conferences, as well as cruise travel



## INTEREST IN TAKING SCHOOLCATIONS

Question: How interested would you be in taking a "schoolcation" next year with your family?

(Base: Wave 39 data. Respondents with school age children they travel with, 352 completed surveys. Data collected December 4-6, 2020)

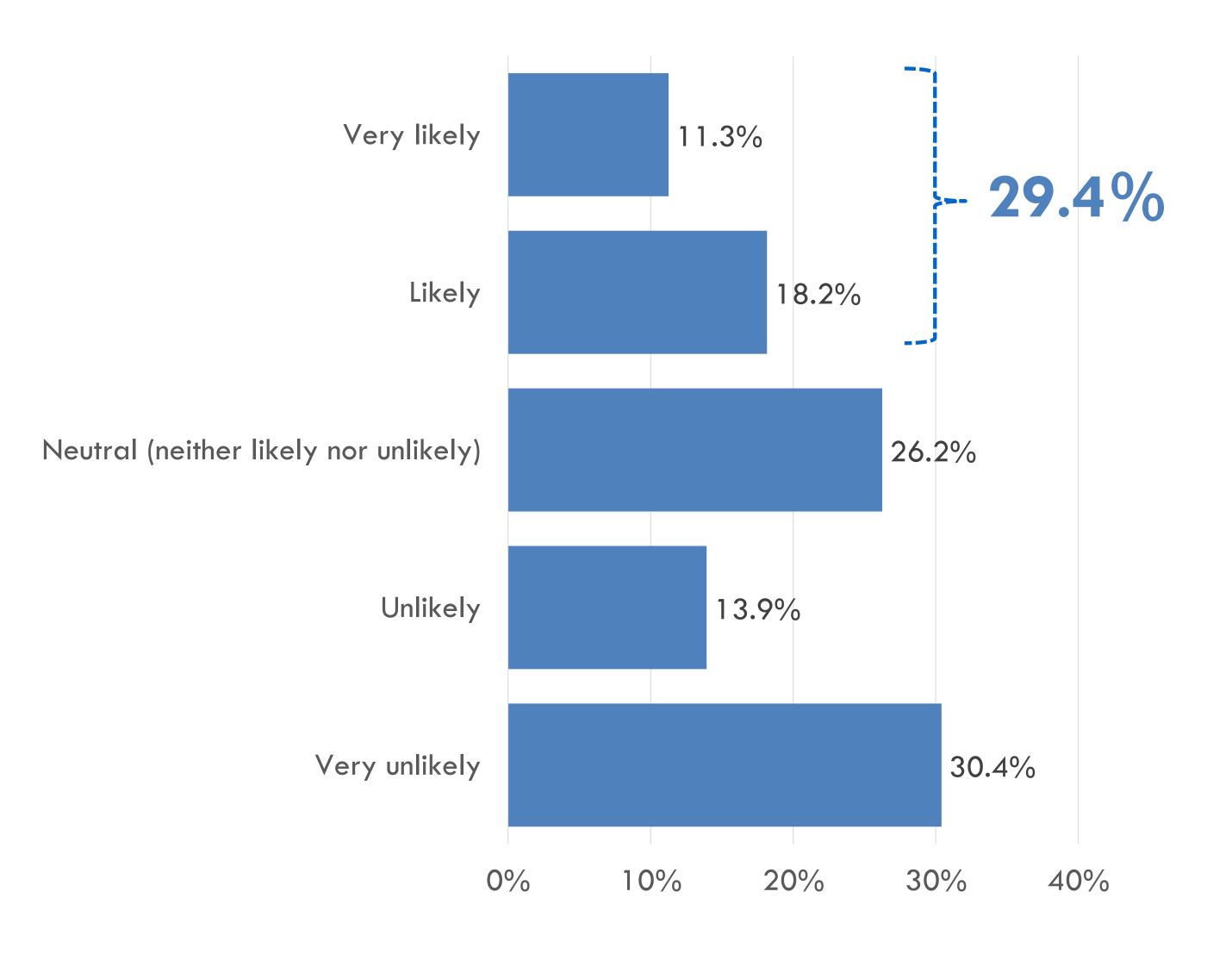




#### LIKELIHOOD TO TAKE A SCHOOLCATION IN 2021

Question: How likely are you to take a "schoolcation" next year?

(Base: Wave 39 data. Respondents with school age children they travel with, 352 completed surveys. Data collected December 4-6, 2020)



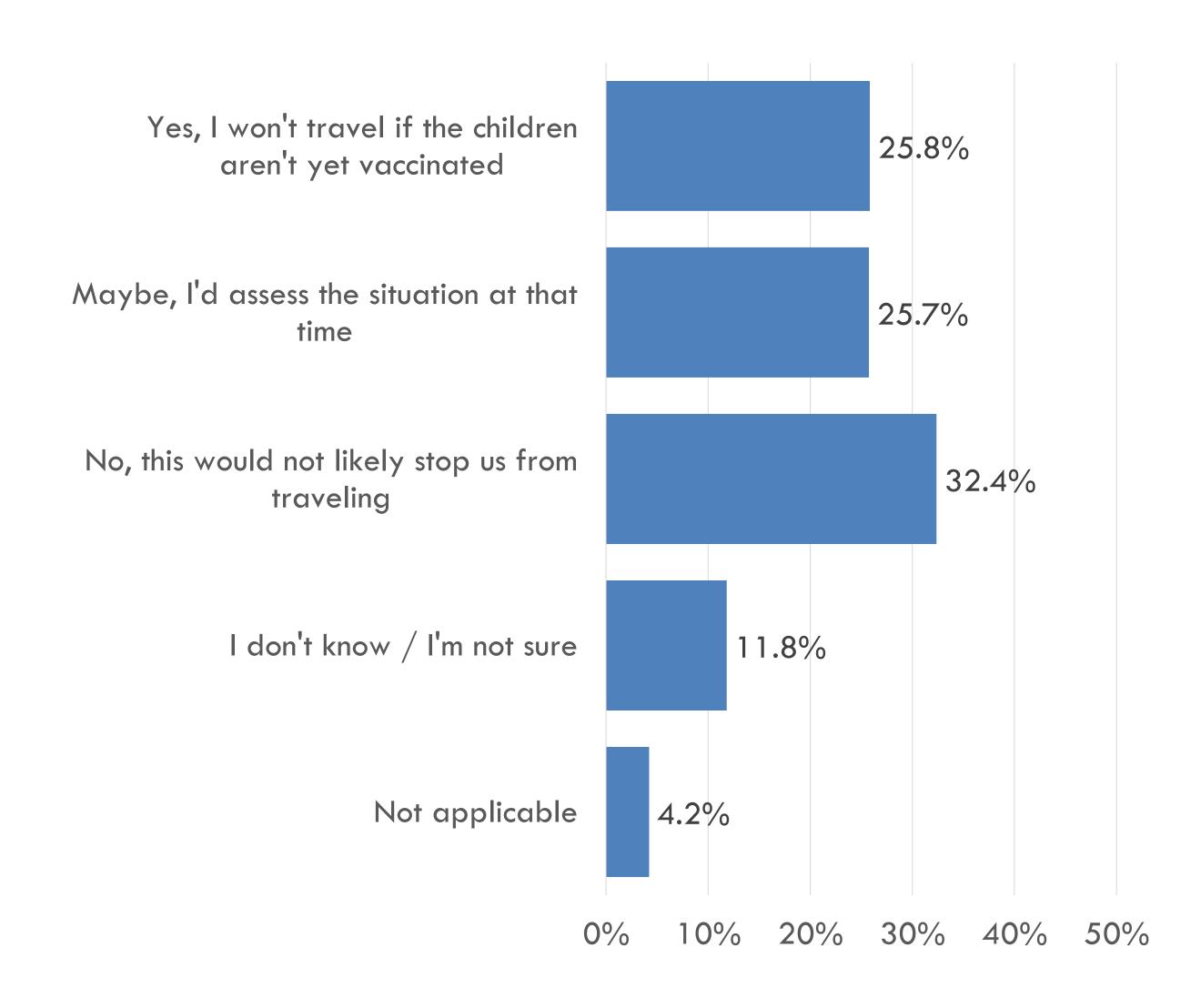


#### SUMMER TRAVEL & CHILDREN'S VACCINATION

Question: Please think now about your family travels NEXT SUMMER. Imagine that by next summer COVID-19 vaccinations have been widely distributed amongst adults, but children have not yet been widely vaccinated. Your children have not yet been vaccinated.

Would this situation be likely to stop you from taking a family vacation next summer? (Select one that best describes you)

(Base: Wave 39 data. Respondents with school age children they travel with, 353 completed surveys. Data collected December 4-6, 2020)



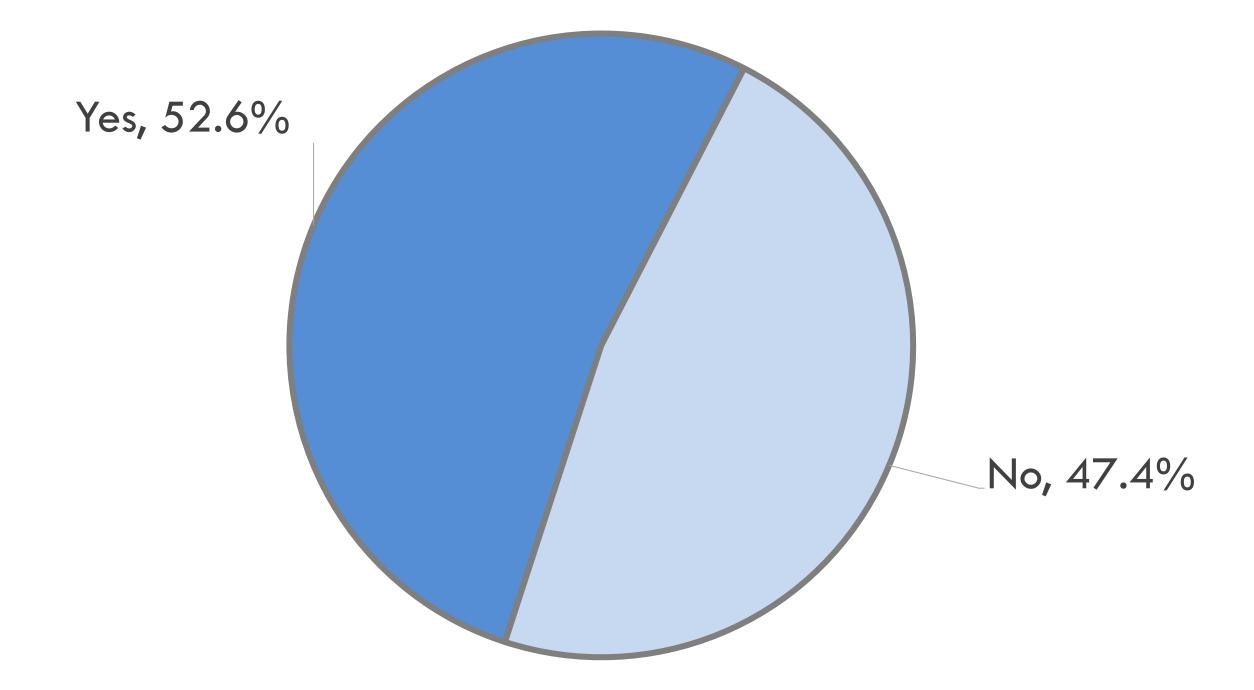


## POSSIBILITY OF REMOTE WORK

Question: Does your job allow you to work remotely? (Select one)

(Base: Wave 39 data. Employed

respondents, 803 completed surveys.



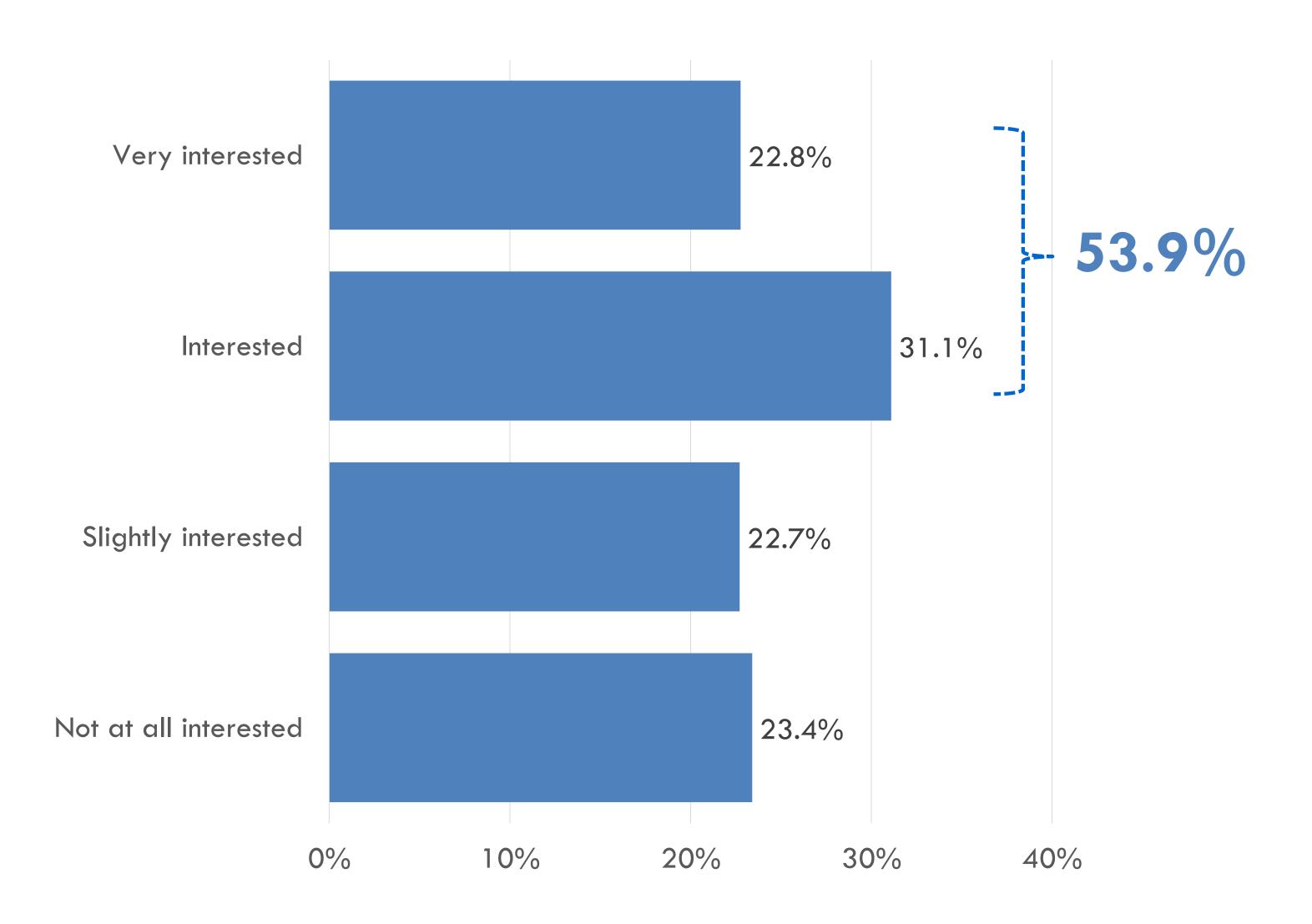


## INTEREST IN WORKCATIONS

Question: A "Workcation" is a new term being used to describe travel where people visit a vacation destination while still working remotely.

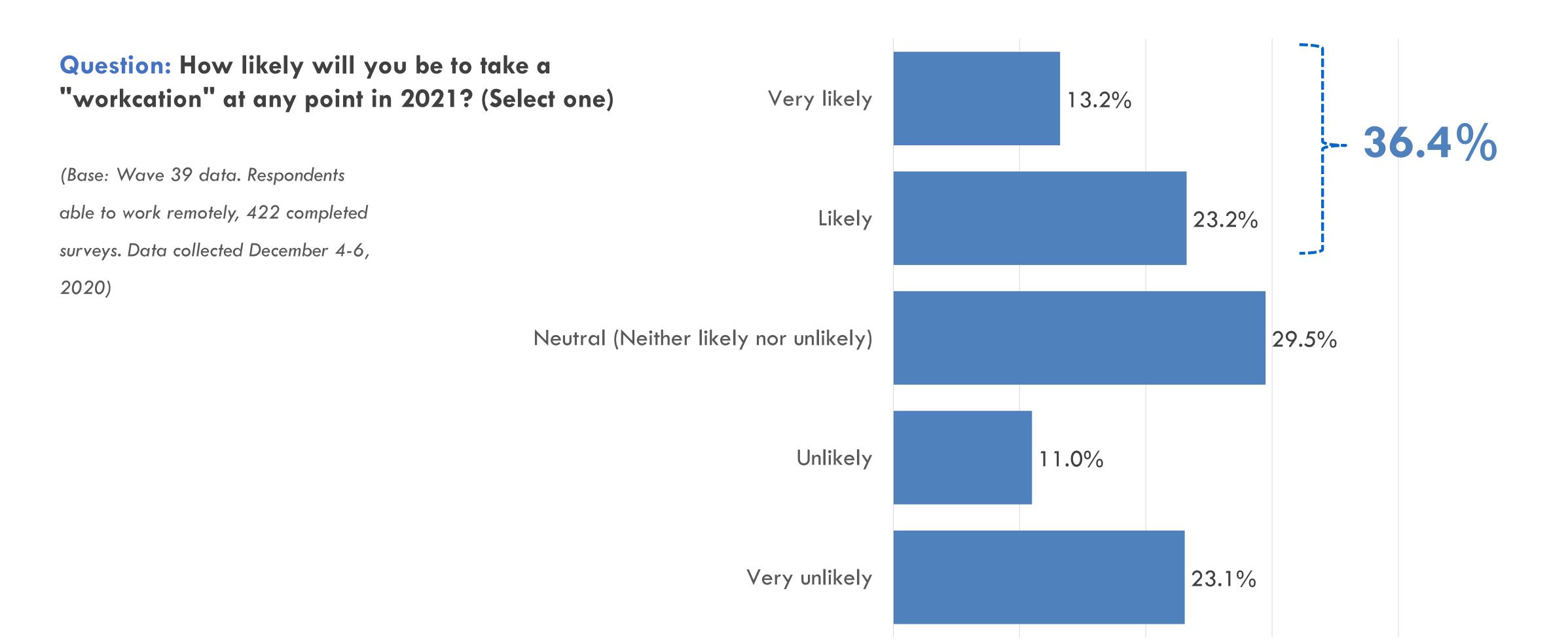
How interested would you be in taking a "workcation" at any point in 2021?

(Base: Wave 39 data. Respondents able to work remotely, 422 completed surveys. Data collected December 4-6, 2020)





#### LIKELIHOOD OF TAKING A WORKCATION



0%

20%

30%

10%

40%





# PEOPLE LIKELY TO WORKCATION

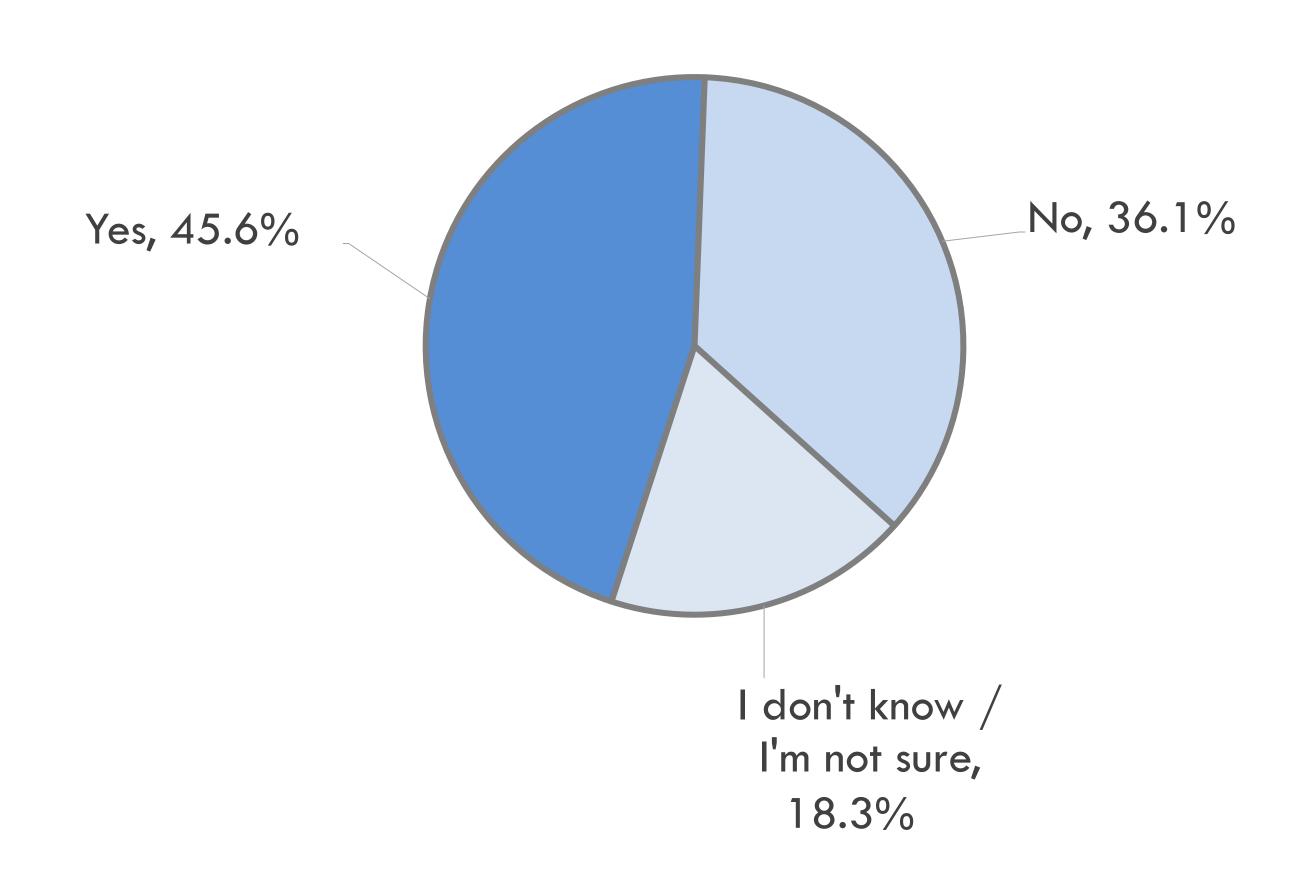
- Skew Millennial or younger, with higher annual household incomes who live in suburban areas
- Feel safer traveling right now and are much likelier to have traveled in 2020: 41.7% have traveled by commercial airline and 73.7% have taken a road trip since the onset of the pandemic
- Likelier to have tentative travel plans for now through the summer of 2021 and plans to take fully one more trip next year compared to their counterparts (average of 4.0 anticipated leisure trips)
- Two times likelier than non-workcationers to plan to travel internationally next year
- They are similarly likely to get a COVID-19 vaccine, but they are more optimistic that the vaccine will allow them to travel safely in the next 6 months
- Can be motivated to travel by discounts and price cuts

#### EXPECTATIONS FOR COVID-19 TO CHANGE BUSINESS TRAVEL

Question: In the longer-term (2-5 years from now), do you feel the COVID-19 experience will change the way your employer does business travel?

(Base: Wave 39 data. Respondents traveling for

business in the past 2 years, 360 completed surveys.

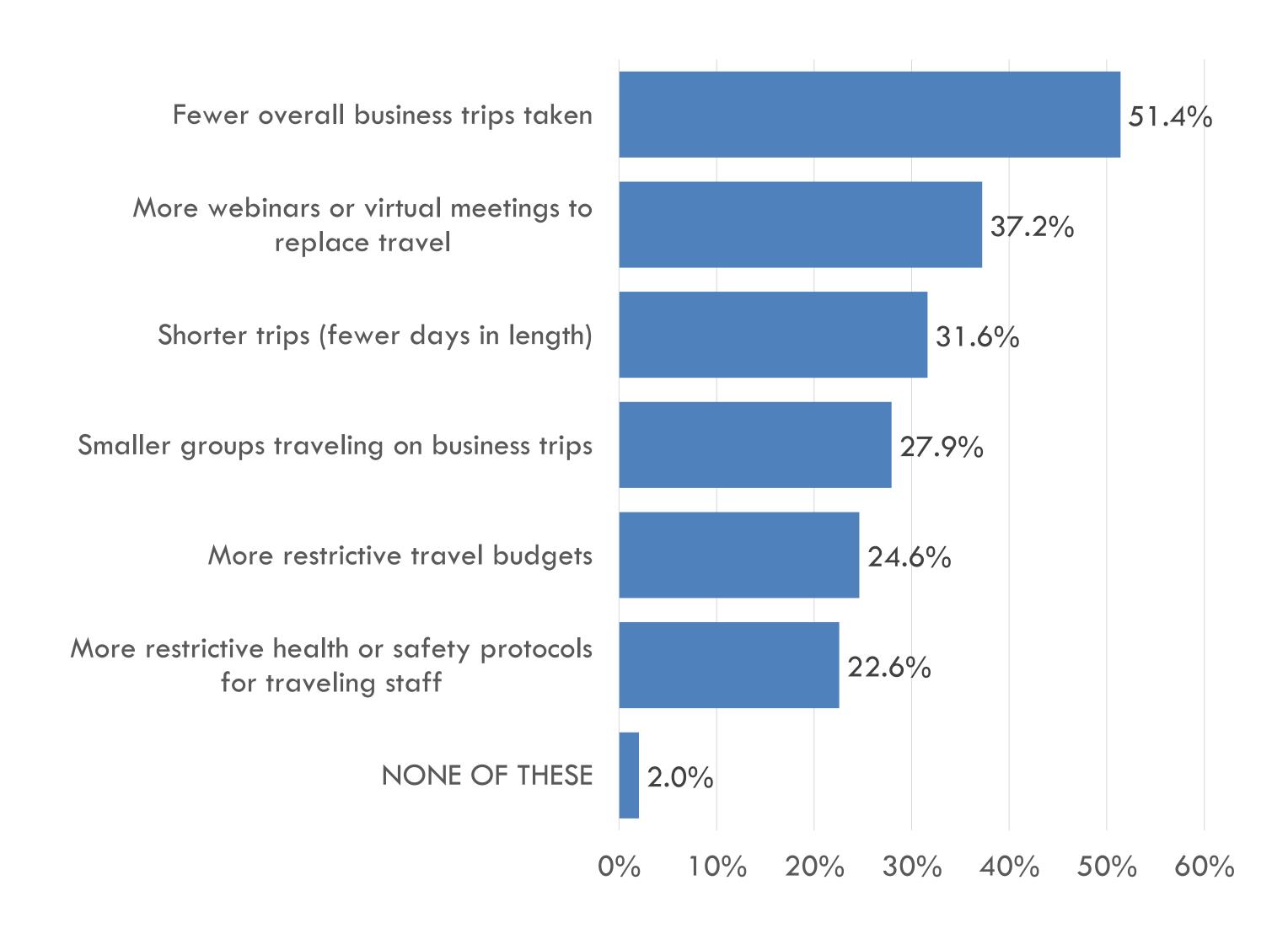




#### EXPECTATIONS ON HOW COVID WILL CHANGE BUSINESS TRAVEL

Question: In which of the following ways do you expect your employer will change its business travel over the longer term? (Select all that apply)

(Base: Wave 39 data. Respondents who think COVID-19 crisis will change the way their employer does business travel, 166 completed surveys. Data collected December 4-6, 2020)







# Key Takeaways

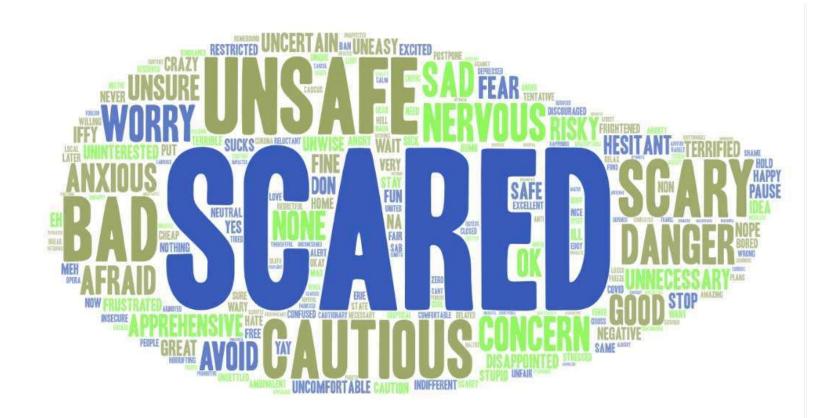
- Three-in-ten Americans who travel with school-aged children say they are likely to take a "schoolcation" in 2021
- Meanwhile, well over a third of Americans whose job allows them to telecommute say they are likely to take a "workcation" next year
- 45.6% of past business travelers feels their employers will change business travel in the long term
- The top expectations for how COVID will change business travel in the longer term includes fewer overall business trips being taken, more webinars or virtual meetings will replace travel and when travel does occur, shorter business trips will become more of the norm



#### Feelings About Traveling Now: Historical Perspective

Question: What ONE WORD best describes how you feel about travel right now?

#### March



#### **April**



#### May



#### October







What ONE WORD best describes how you feel about travel in 2021?





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THE STATE OF THE INTERNATIONAL TRAVELER



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

Send suggestions or requests for questions to:

Info@DestinationAnalysts.com & Myha@DestinationAnalysts.com

