

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings
December 22nd, 2020

Destination  Analysts

Independent Unbiased Research





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

DestinationAnalysts.com/covid-webinars

What to Expect:

- We will continue this weekly study into 2021 indefinitely
- The study **WILL be conducted** the weeks of the New Years holidays, and findings will be released via email and on our blog as usual
- An online presentation of findings will be available for our research subscribers on Tuesday, December 29th 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

RESEARCH OVERVIEW & METHODOLOGY

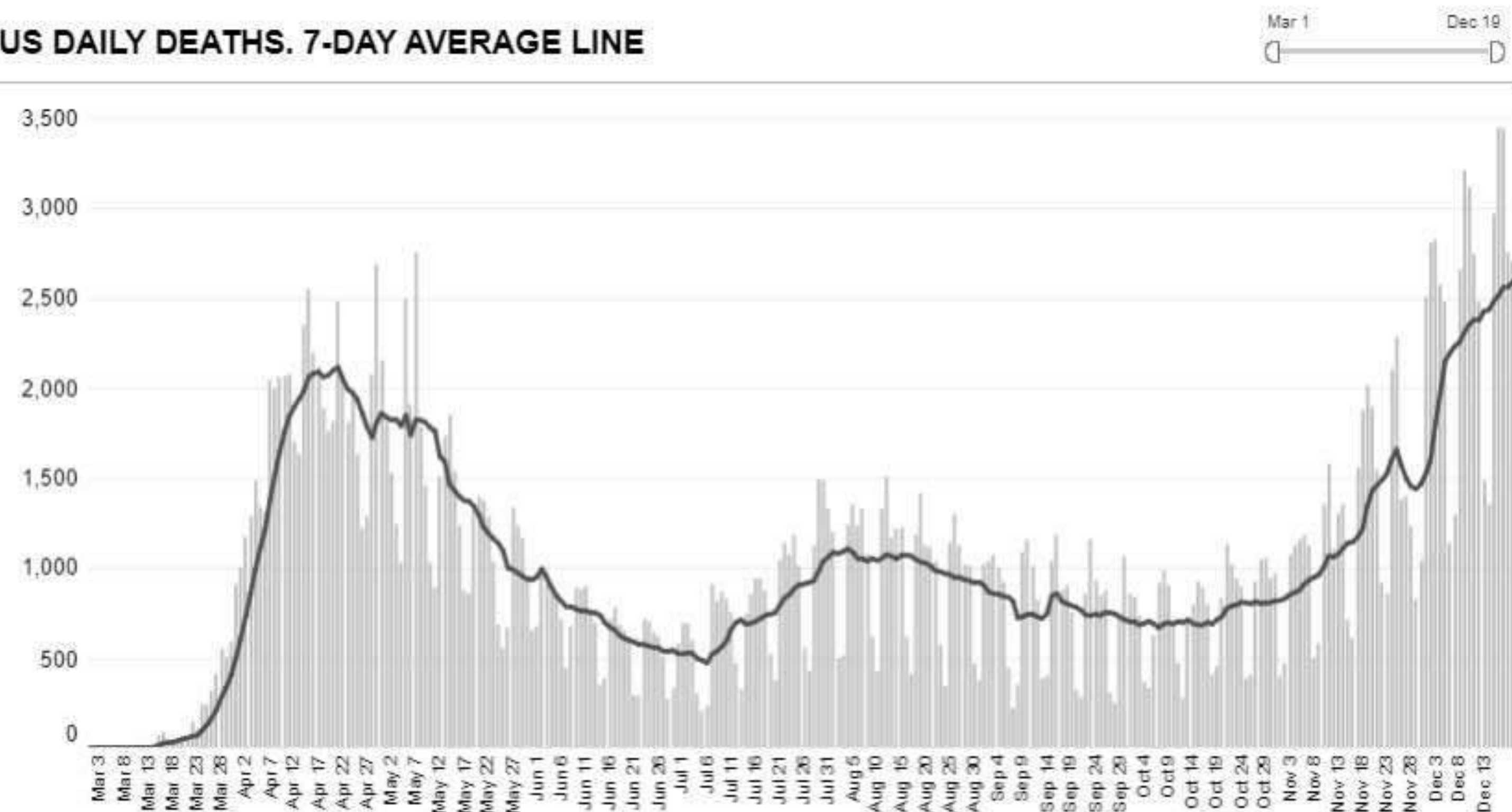
- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 41 data (fielded December 18th-20th) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S.Regions





US DAILY DEATHS. 7-DAY AVERAGE LINE



 United States

Coronavirus Cases:
18,077,768

Deaths:
323,401



LOCAL // BAY AREA & STATE

‘Surge upon a surge’: Experts fear the dire situation in California hospitals will get worse



Erin Allday

Dec. 19, 2020

Updated: Dec. 19, 2020 8 a.m.



Dr. Sara Cody gave her last COVID-19 update of the year to the Santa Clara County Board of Supervisors on Tuesday — a momentous day, with the first coronavirus vaccines just arrived that morning.

But Cody, the county health officer, was subdued. This year, she told the board during its virtual meeting, her disembodied voice echoing slightly, “started so unremarkably, but has become one of the most difficult years of the last 100.”

The county is reporting on average 1,000 new cases a day and intensive care units at all of the hospitals are running out of beds, she said, “And today we are reporting 24 new deaths.”

Cody broke off then, her silence heavy. One of the supervisors told her to take her time. When Cody next spoke, her voice wavered with tears. “We have lost 553 people in our county” since the pandemic began, she said, and paused again to collect herself.

CORONAVIRUS

CDC looks into passenger's COVID-19 death on United flight from Orlando

By JANET MCCONNAUGHEY

ASSOCIATED PRESS

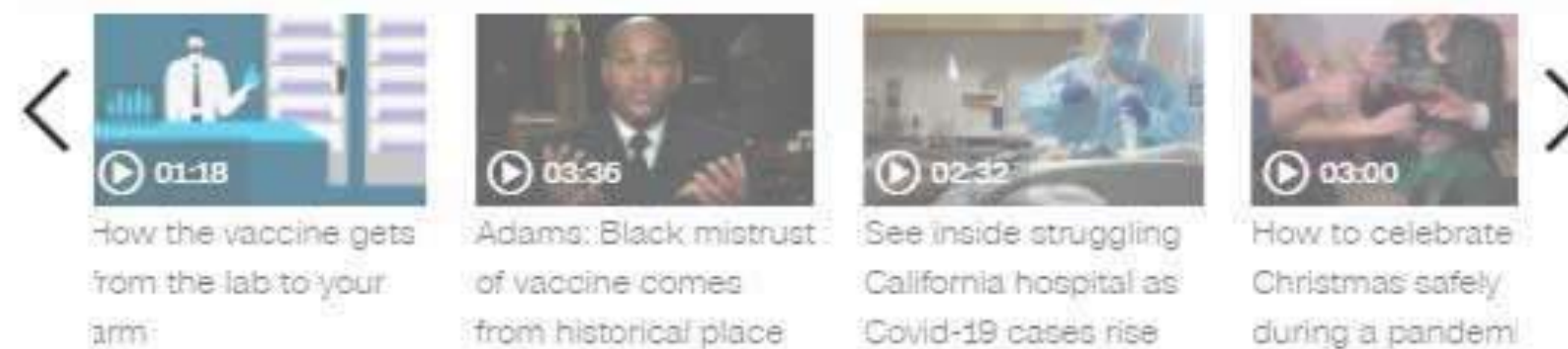
DEC 19, 2020 AT 4:48 PM



US sees record Covid-19 cases as CDC advisory group votes to recommend Moderna vaccine

By [Dakin Andone](#) and Christina Maxouris, CNN

🕒 Updated 8:32 PM ET, Sat December 19, 2020



(CNN) — Covid-19 continues to ravage the United States, even as a [second coronavirus vaccine](#) received a vote of recommendation from a committee at the US Centers for Disease Control and Prevention.

The CDC's Advisory Committee on Immunization and Practices (ACIP) voted Saturday to recommend Moderna's vaccine candidate for people 18 and older, following the [US Food and Drug Administration's](#) decision a day earlier to authorize the vaccine for emergency use.



Economic Policy

Senate majority leader announces approximately \$900 billion deal on emergency relief package



Senate leaders on both sides of the aisle each blamed the other for the long stint between the last coronavirus

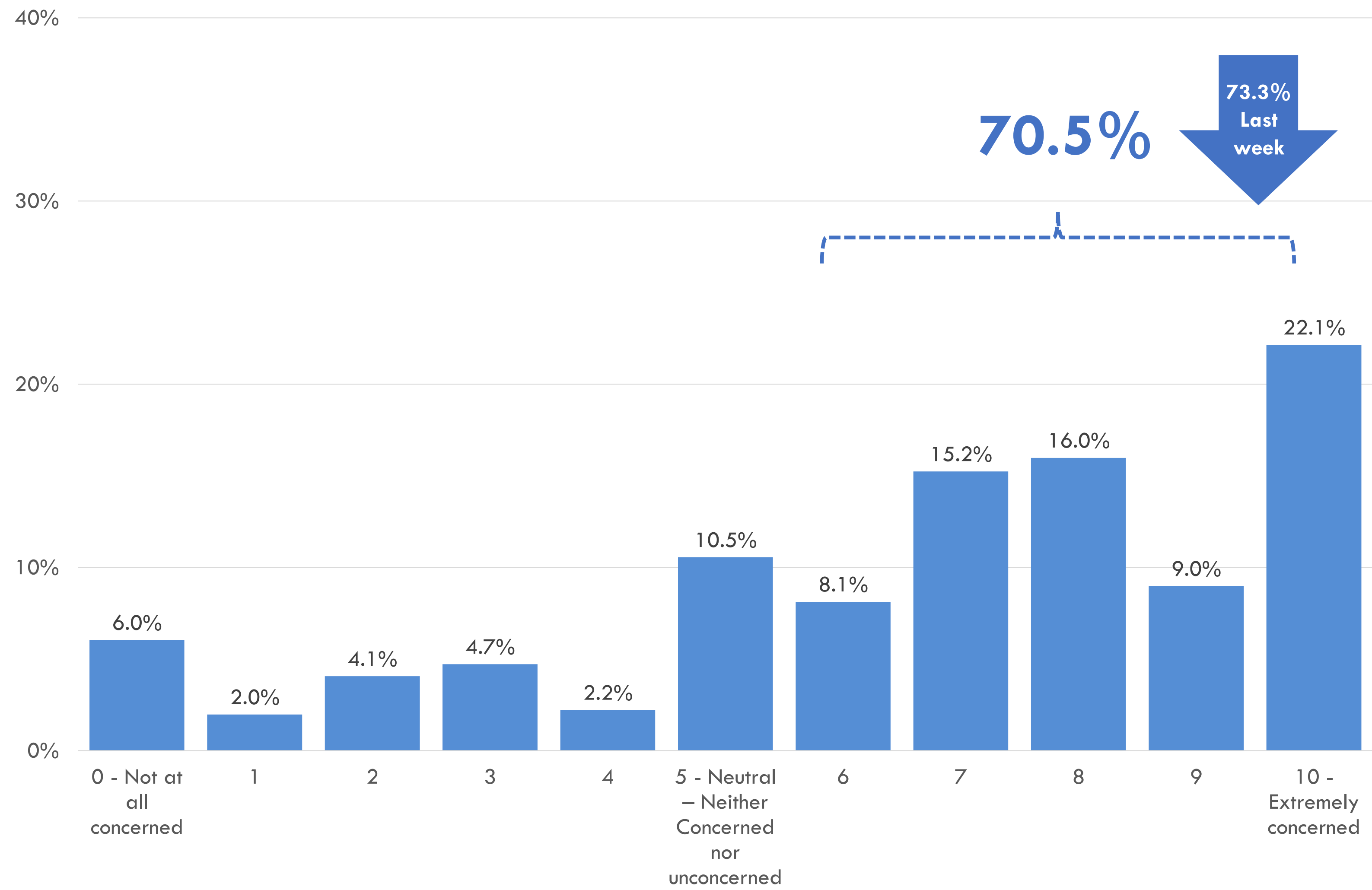
CURRENT TRAVELER SENTIMENT



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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

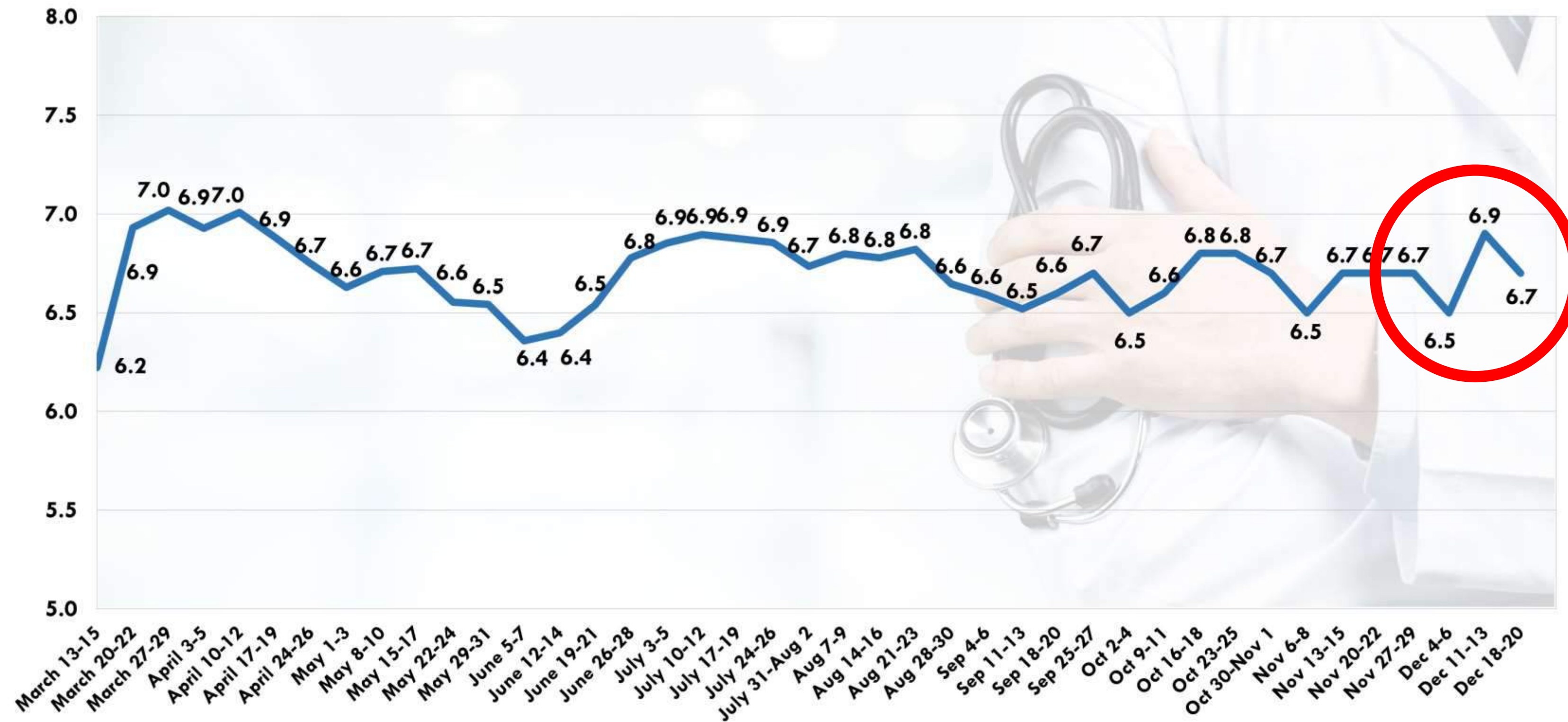


PERSONAL HEALTH CONCERNS

MARCH 13 – DECEMBER 20



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



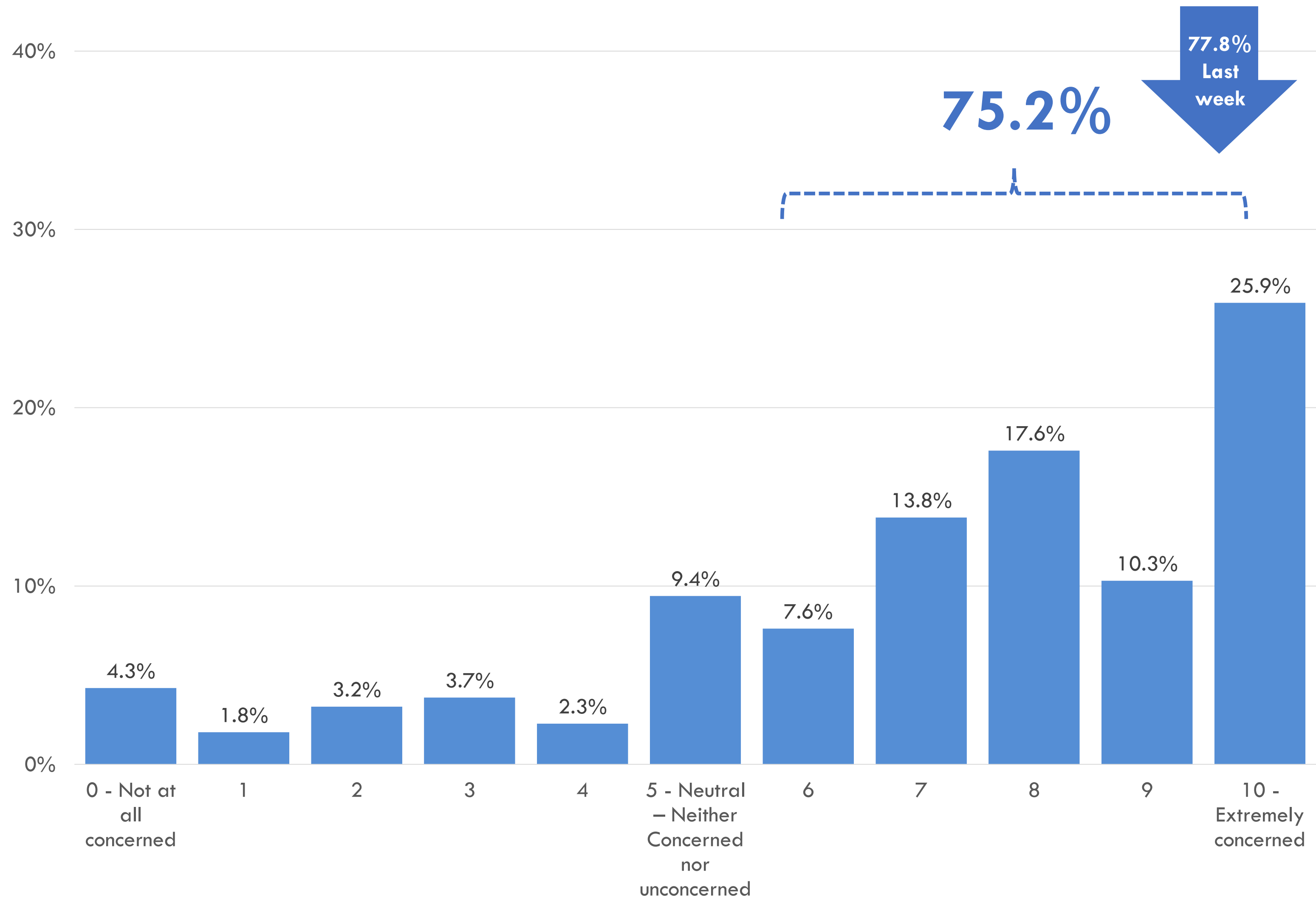
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?

(Base: Waves 1-41. 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 and 1,201 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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

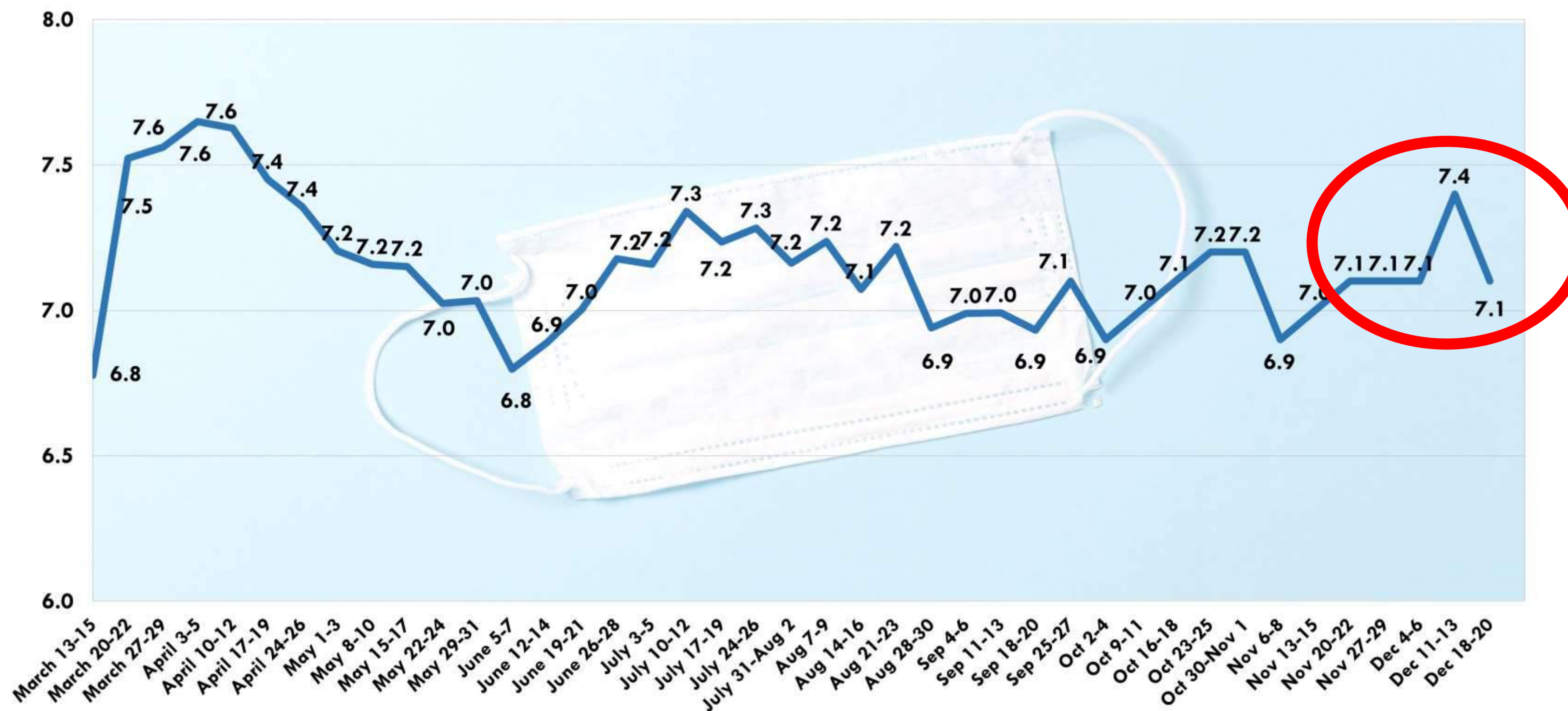


HEALTH CONCERNS (FAMILY & FRIENDS)

MARCH 13 – DECEMBER 20



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



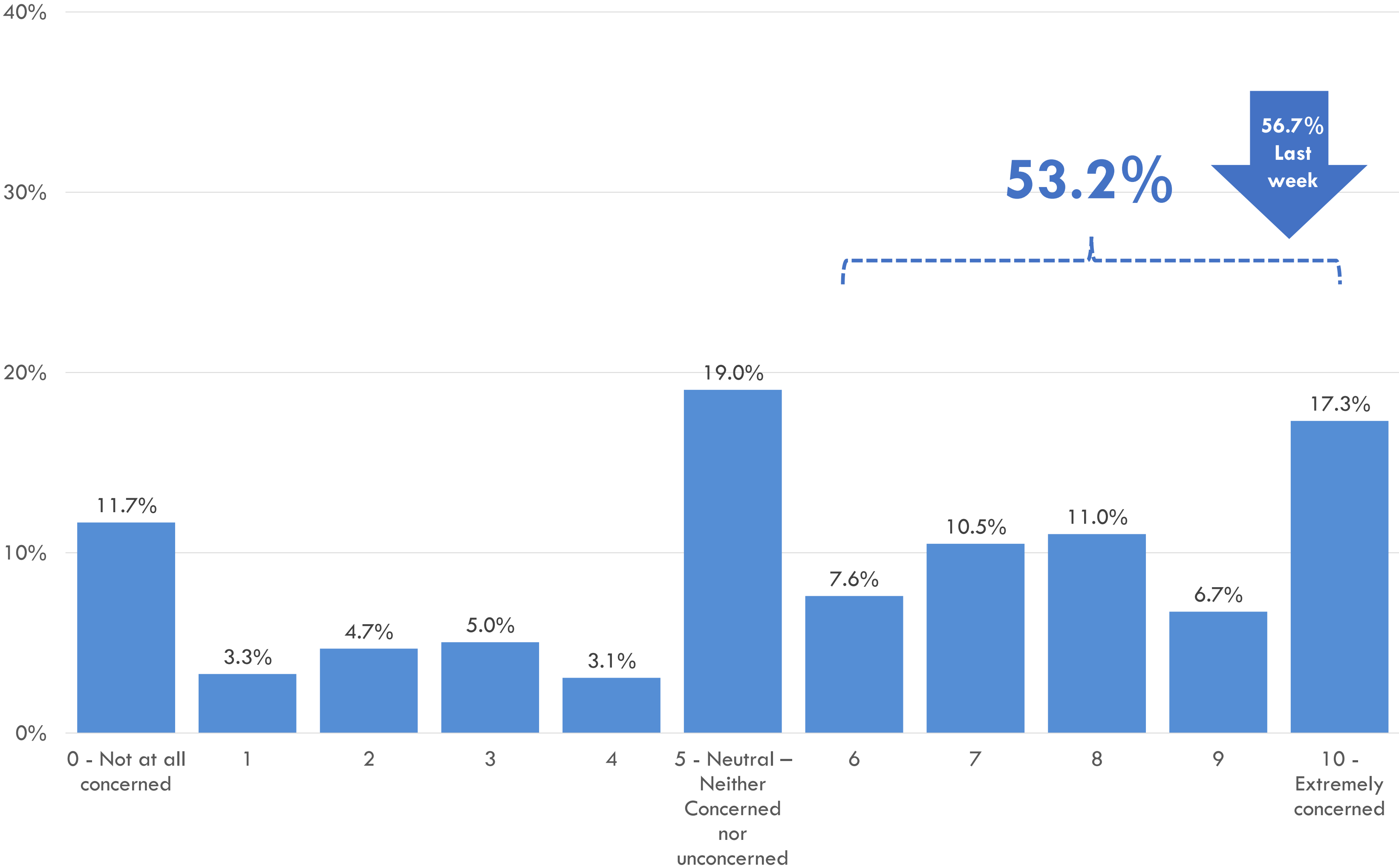
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?

(Base: Waves 1-41. 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 and 1,201 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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



CONCERNS ABOUT PERSONAL FINANCES

MARCH 13 – DECEMBER 20



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



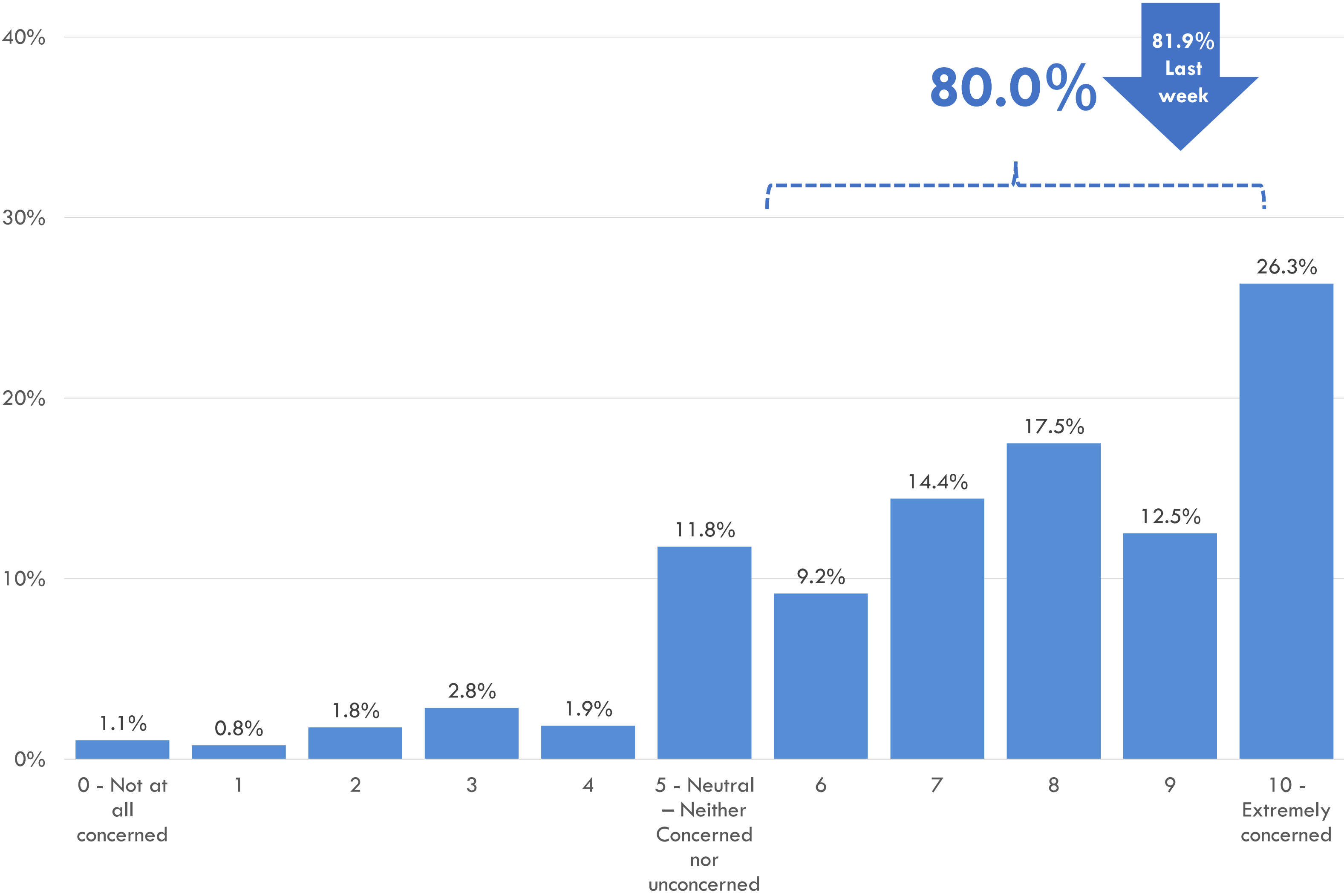
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON YOUR PERSONAL FINANCES?

(Base: Waves 1-41. 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 and 1,201 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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



CONCERNS ABOUT NATIONAL ECONOMY

MARCH 13 – DECEMBER 20



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 1-41. 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 and 1,201 completed surveys.



SILENT GENERATION



BABY BOOM GENERATION



GENERATION X



MILLENNIALS

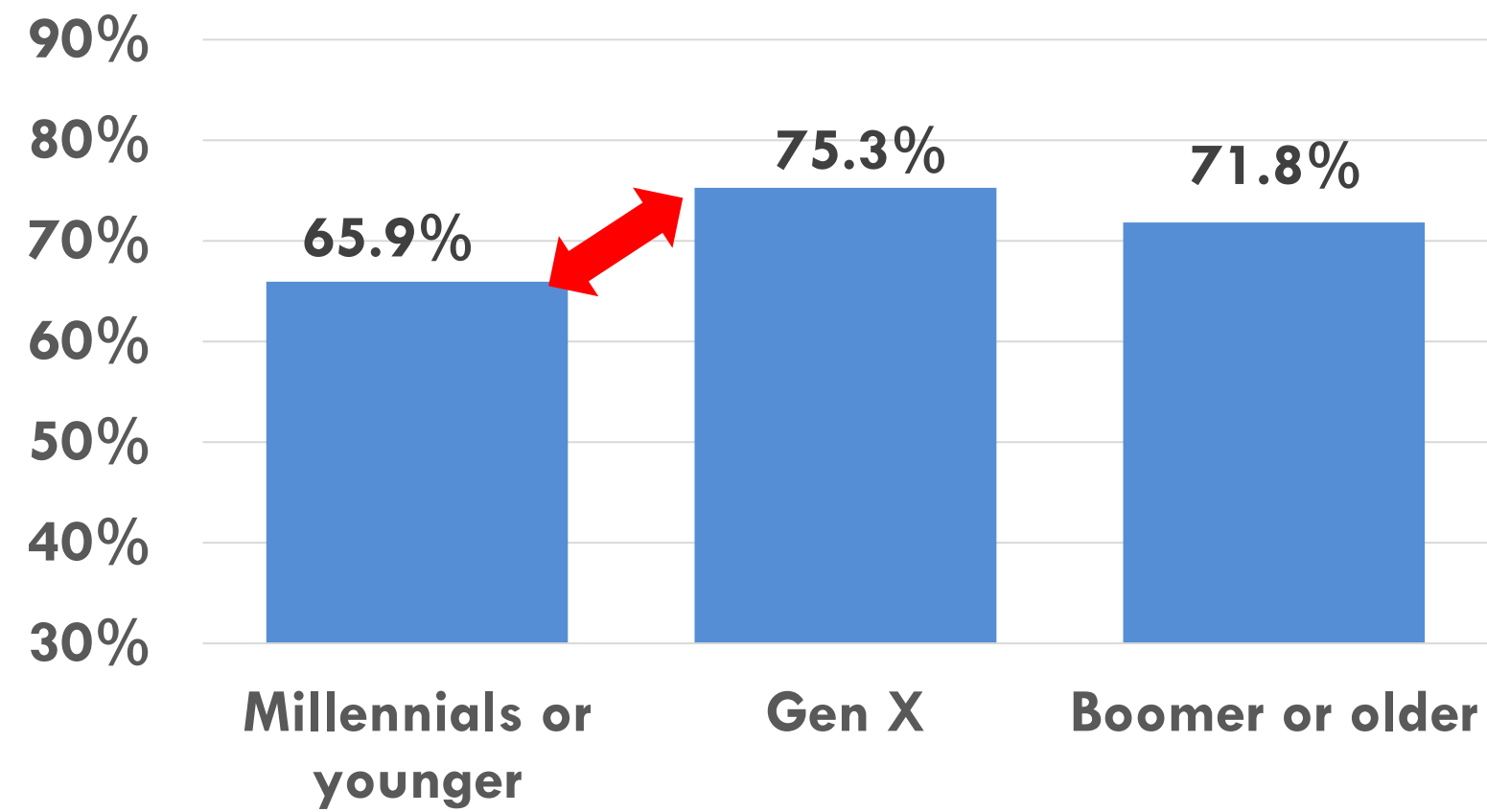


GENERATION Z

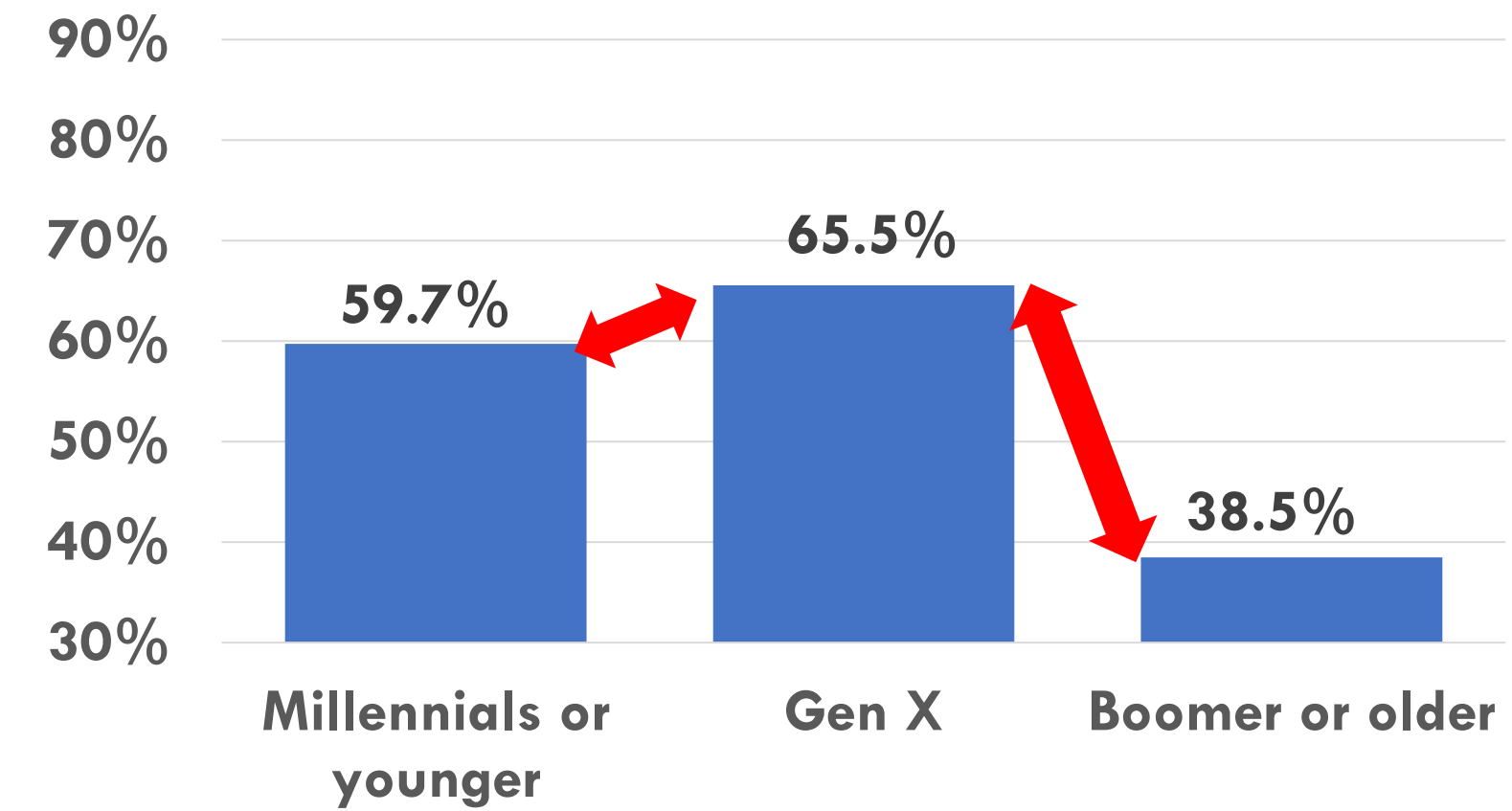


GENERATION ALPHA

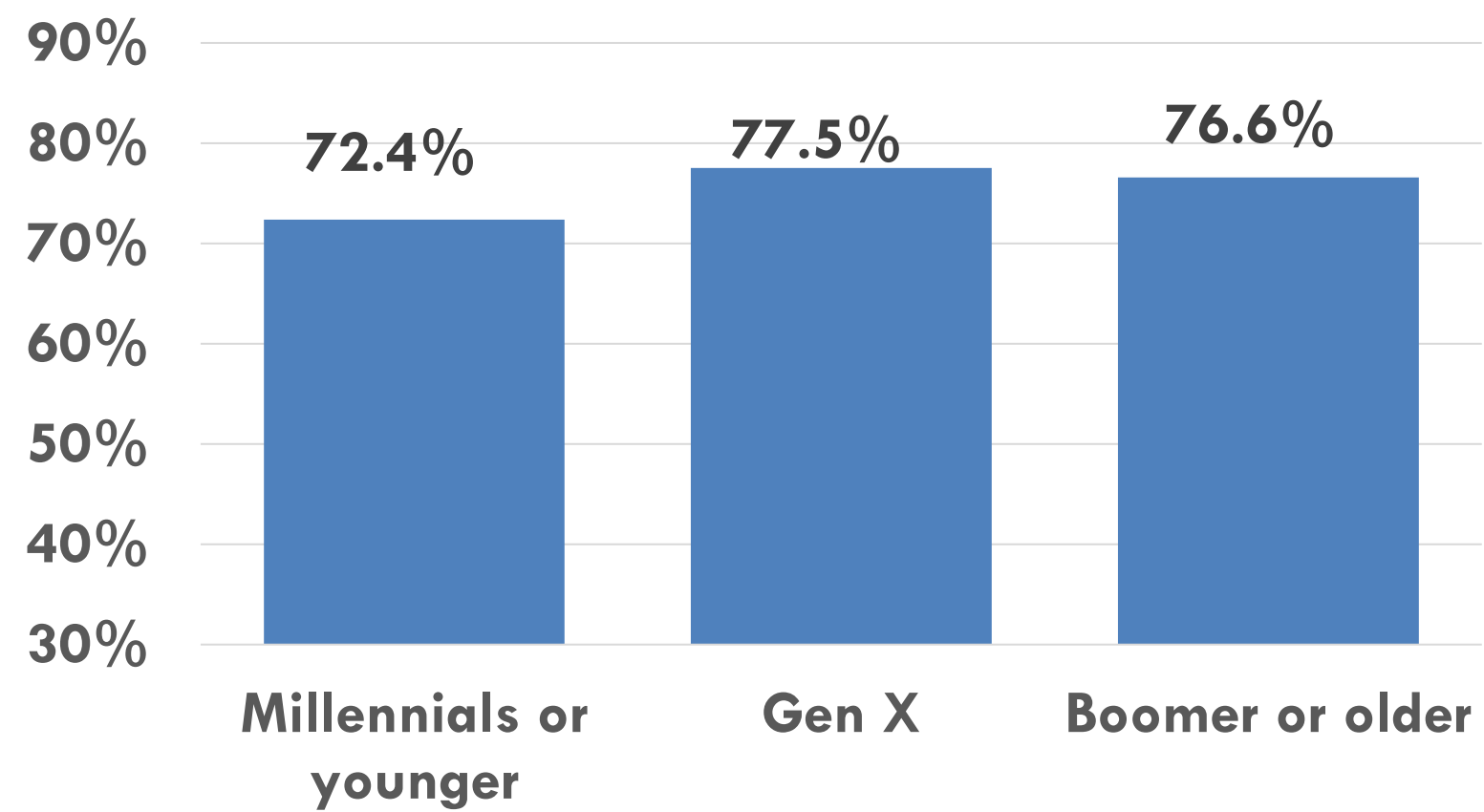
Personal Health Concerns (6-10)



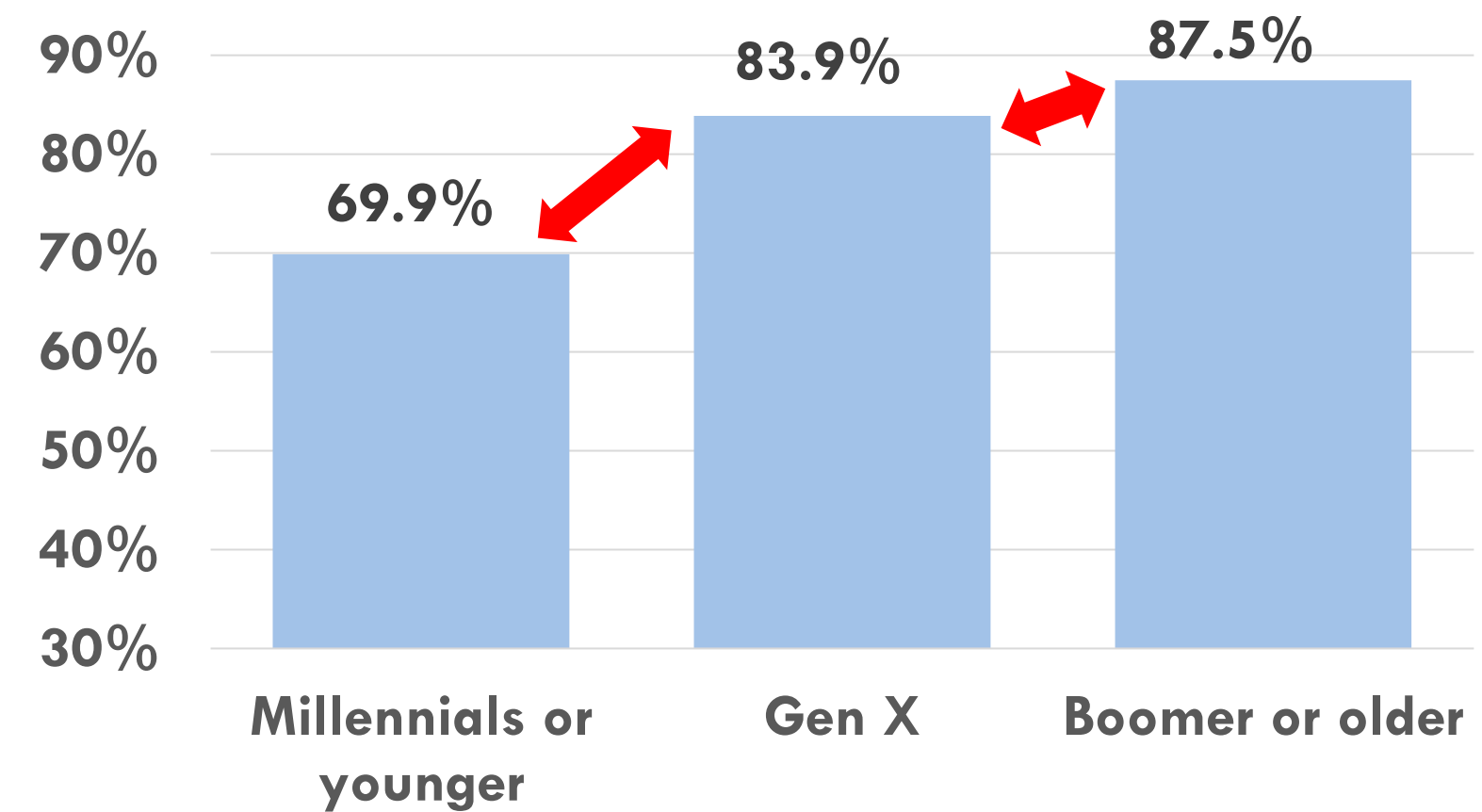
Personal Financial Concerns (6-10)



Friends & Family Health Concerns (6-10)



National Economic Concerns (6-10)

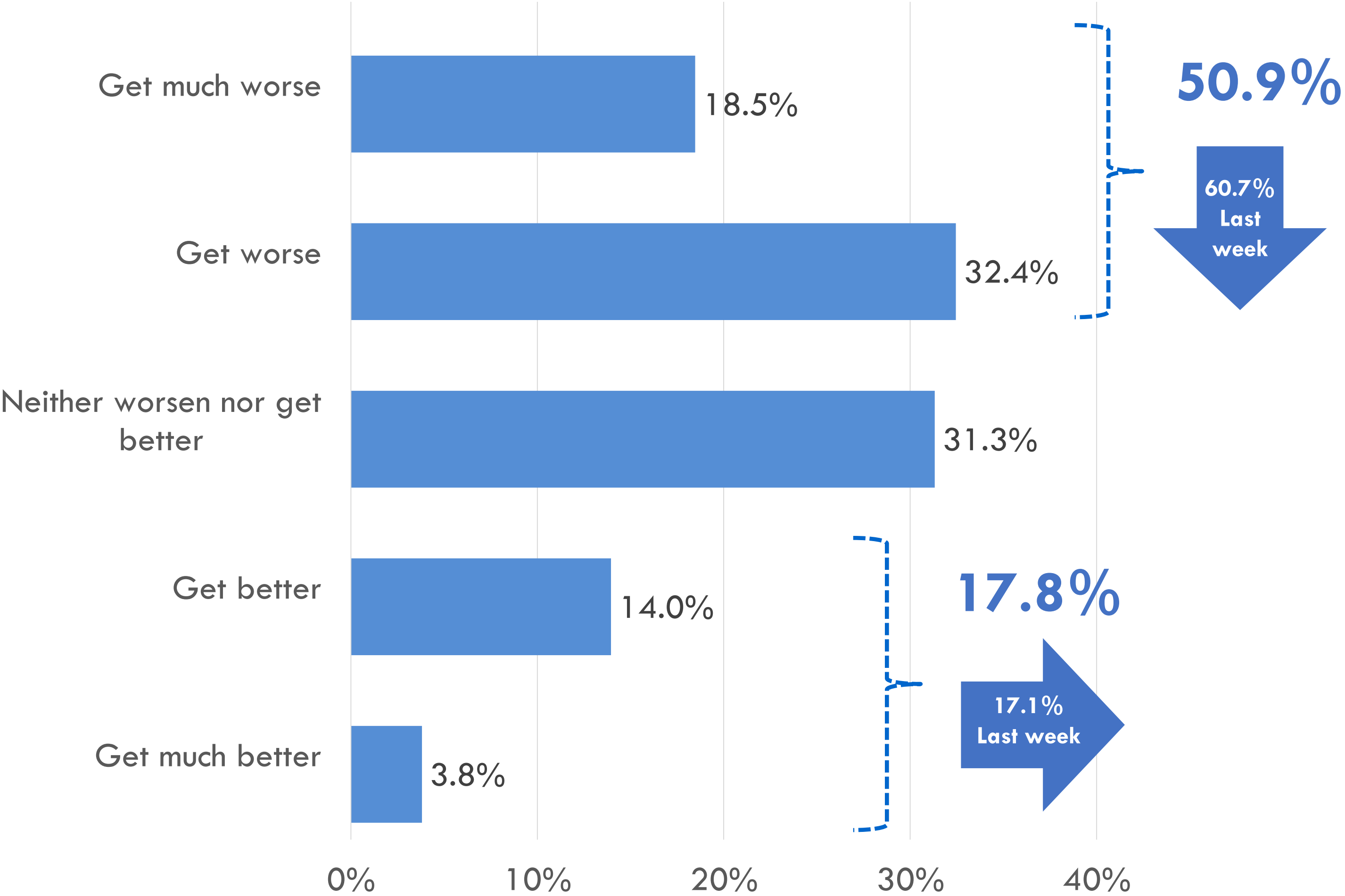


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

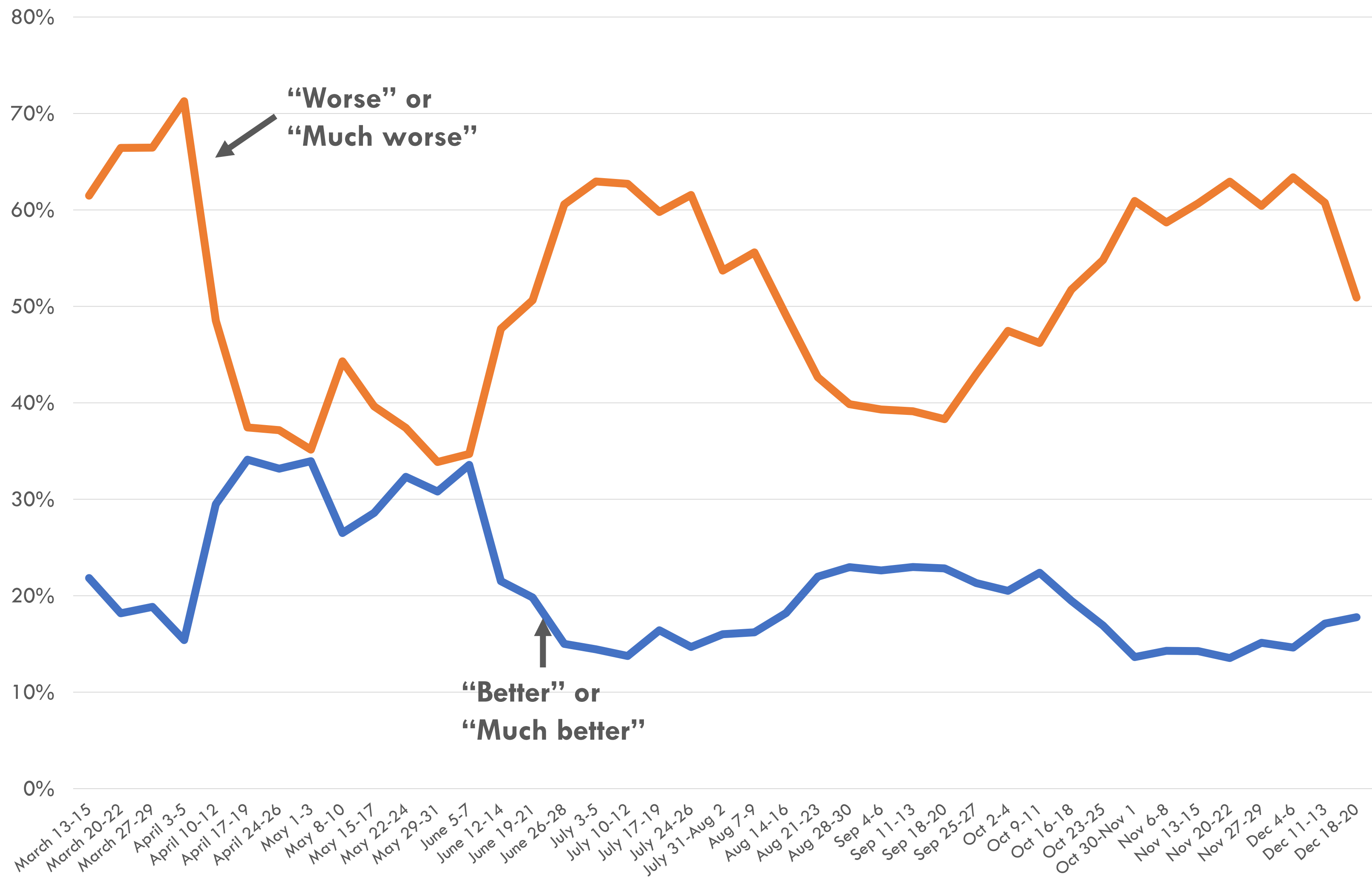


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-41)

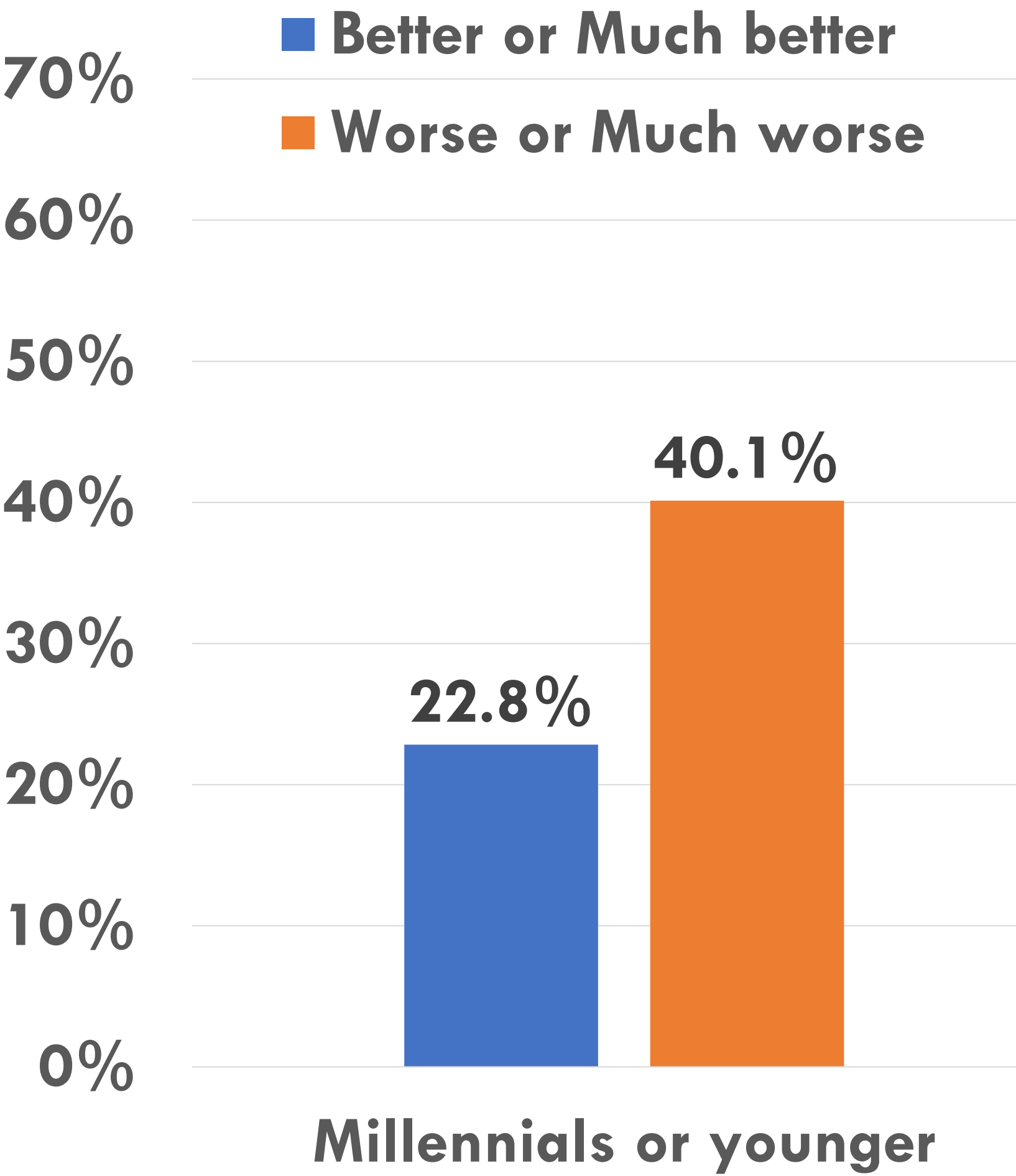
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

(Base: Waves 1-41. 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 and 1,201 completed surveys.)

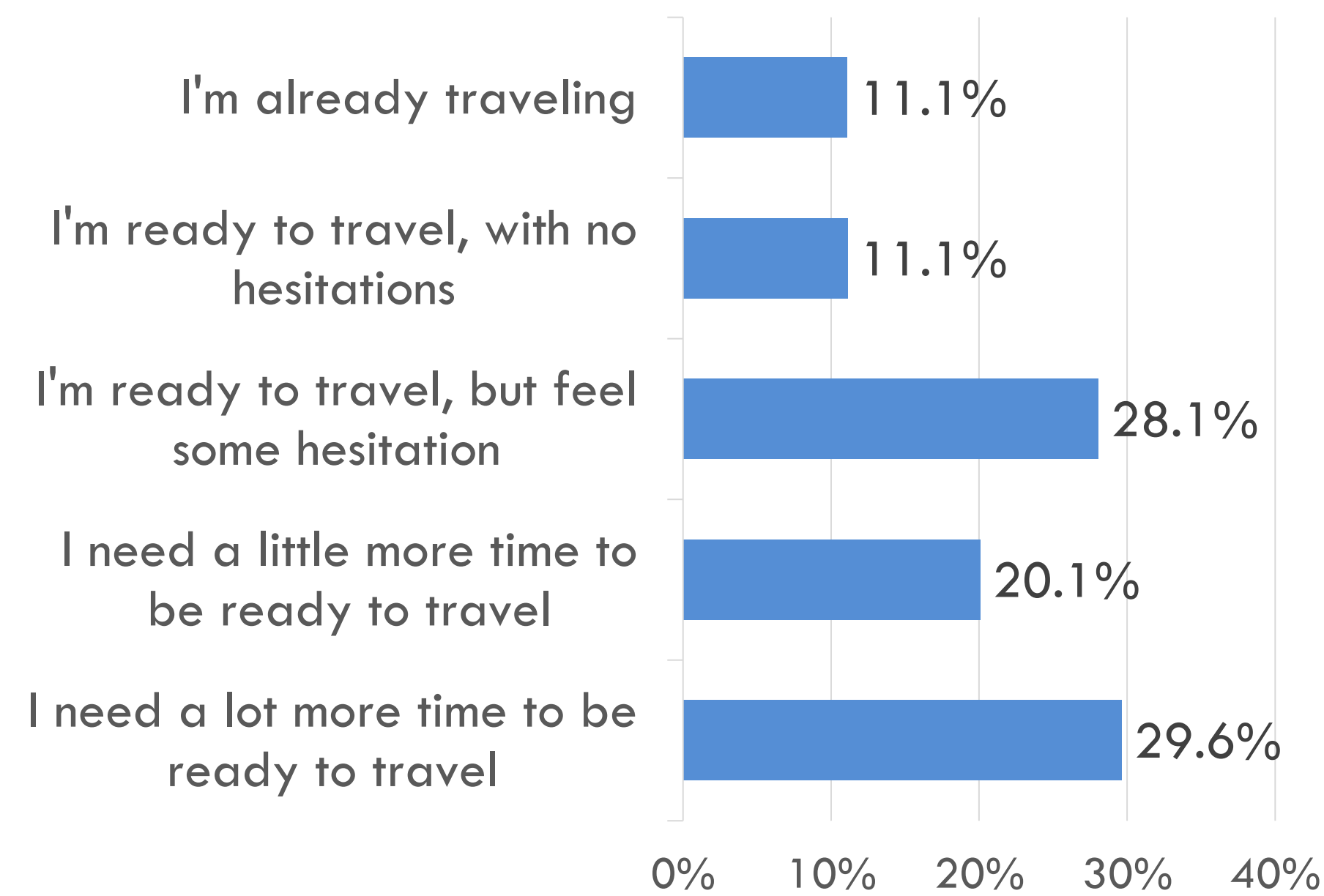


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVE 41)



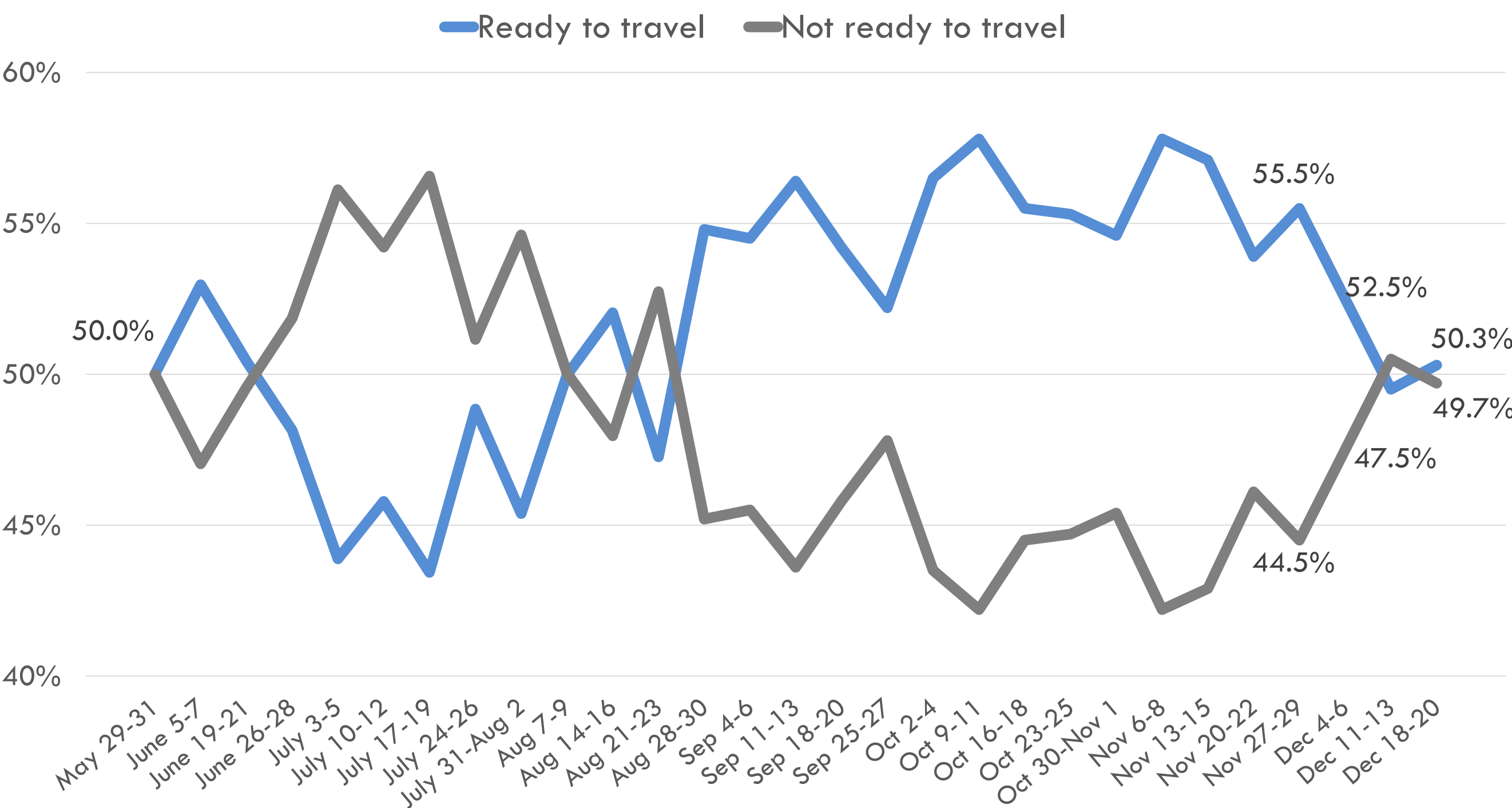
TRAVEL STATE-OF-MIND

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 15-41. 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 and 1,201 completed surveys.)

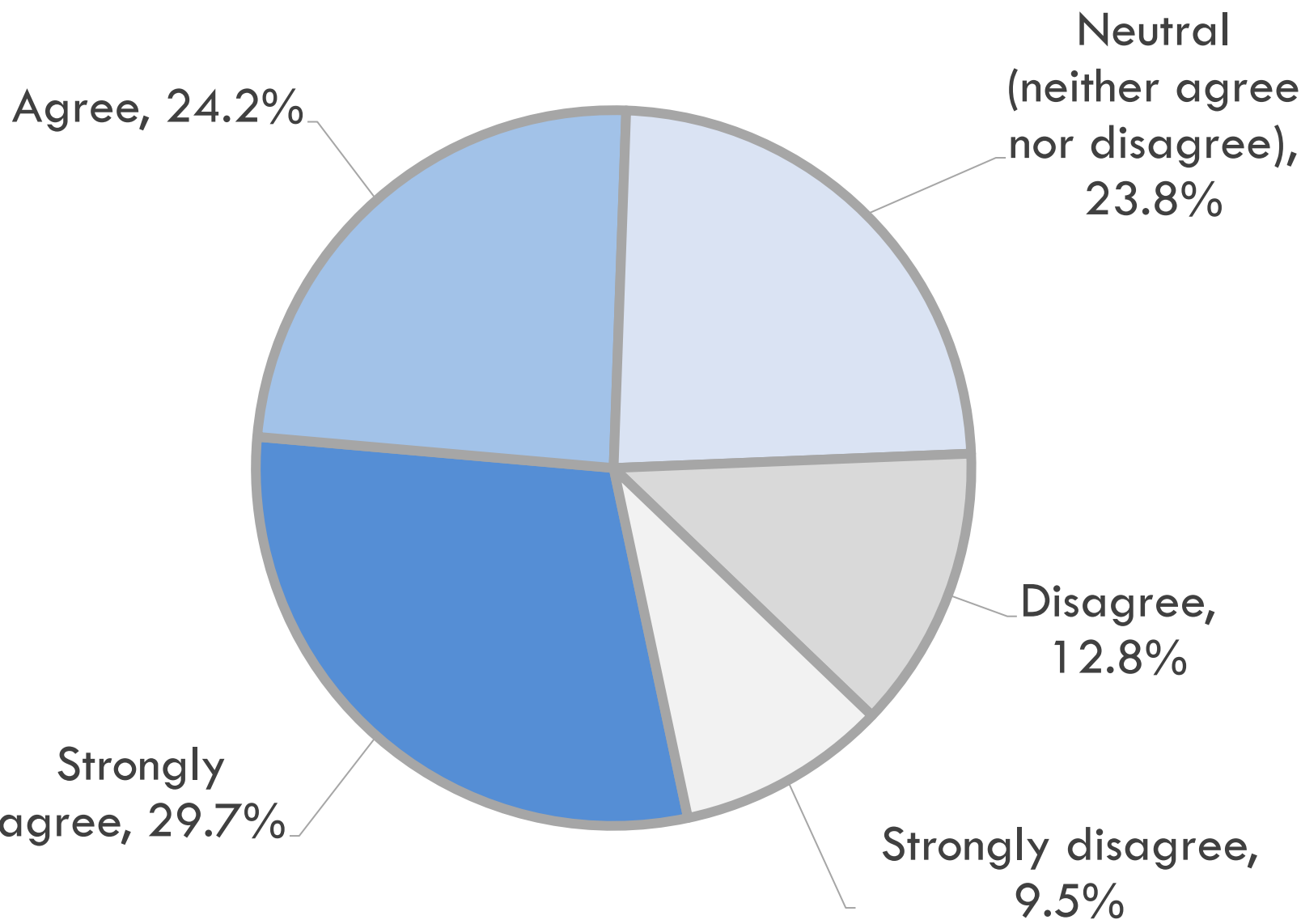
Historical data



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

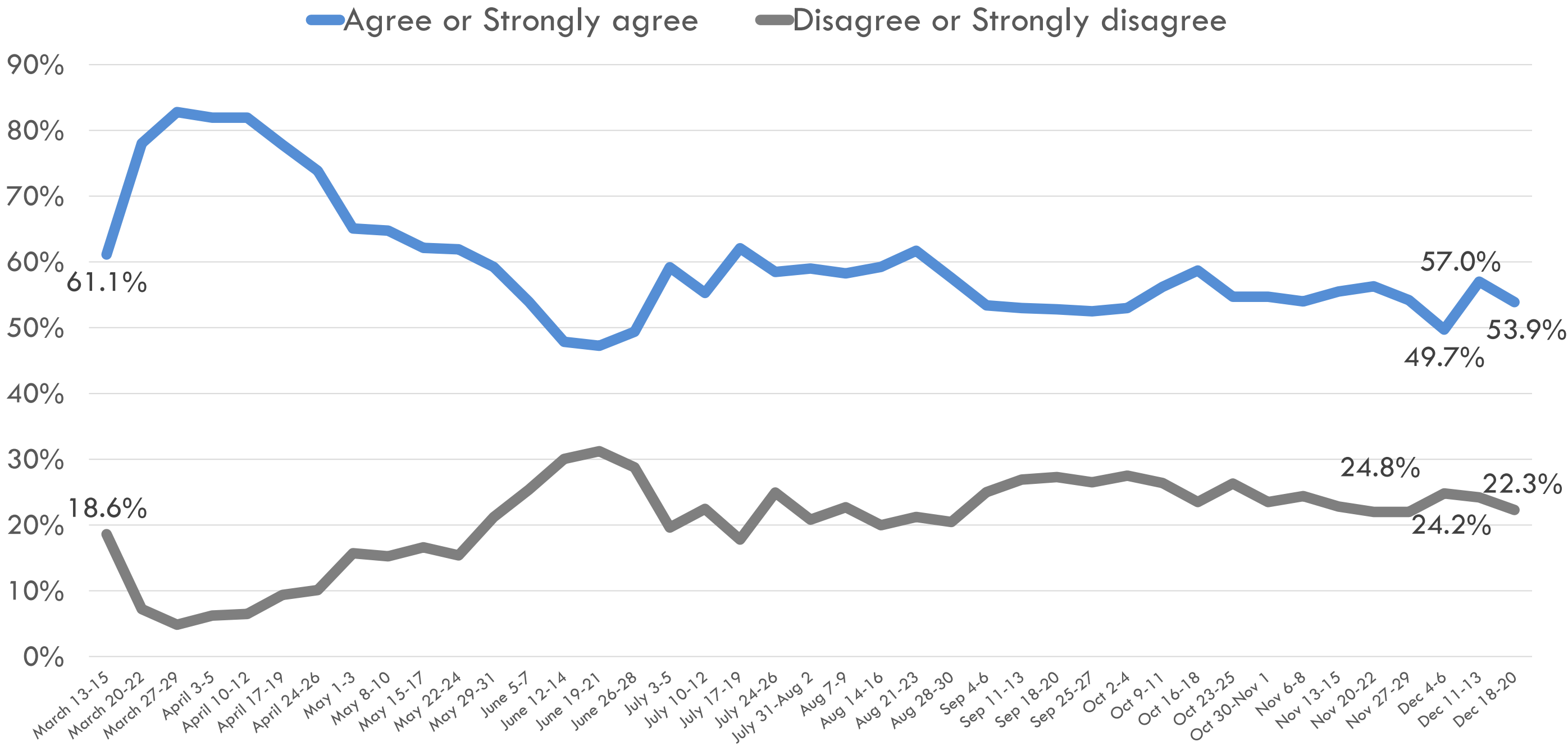
How much do you agree with the following statement?

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



(Base: Waves 1-41. 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 and 1,201 completed surveys.

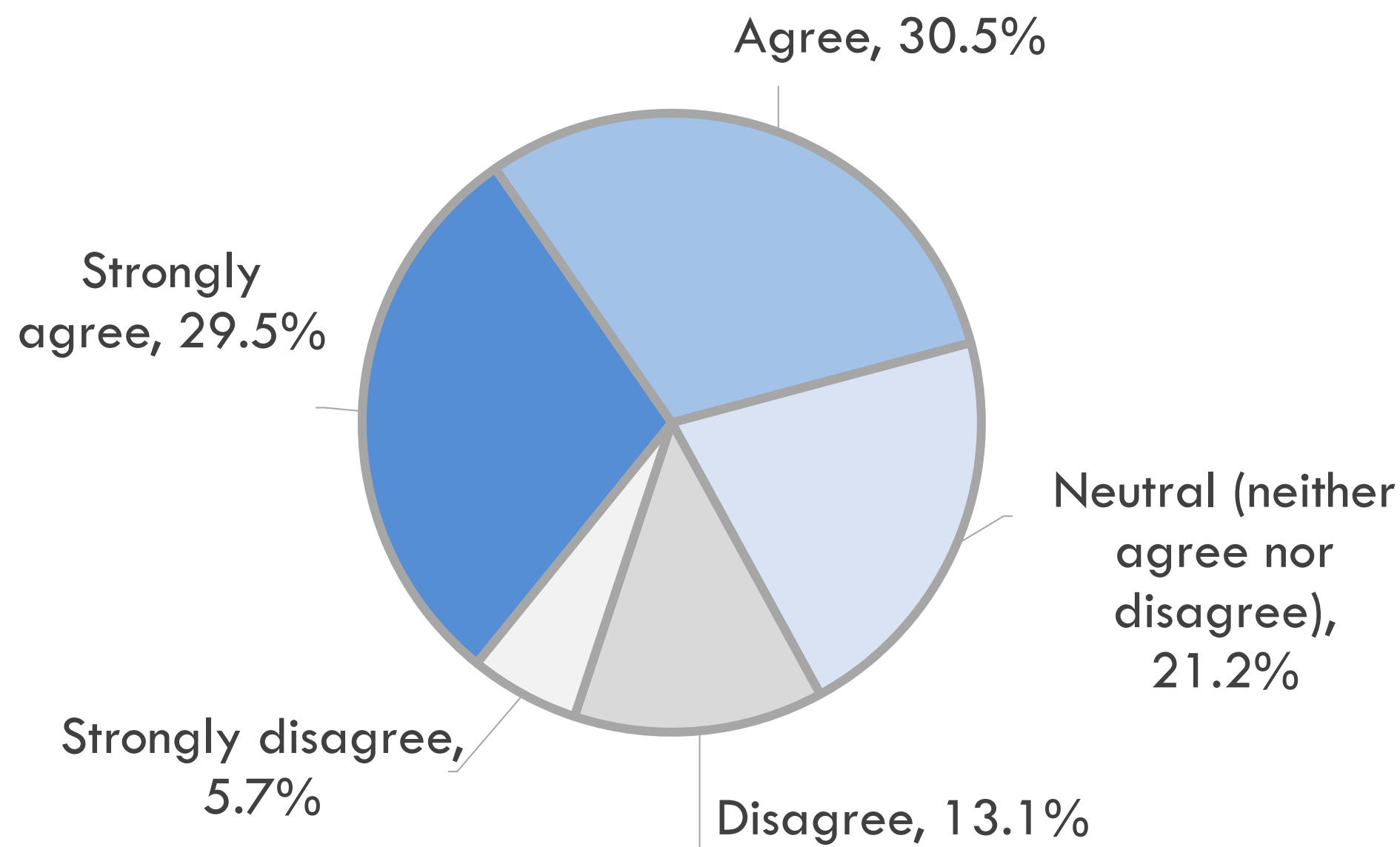
Historical data



INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

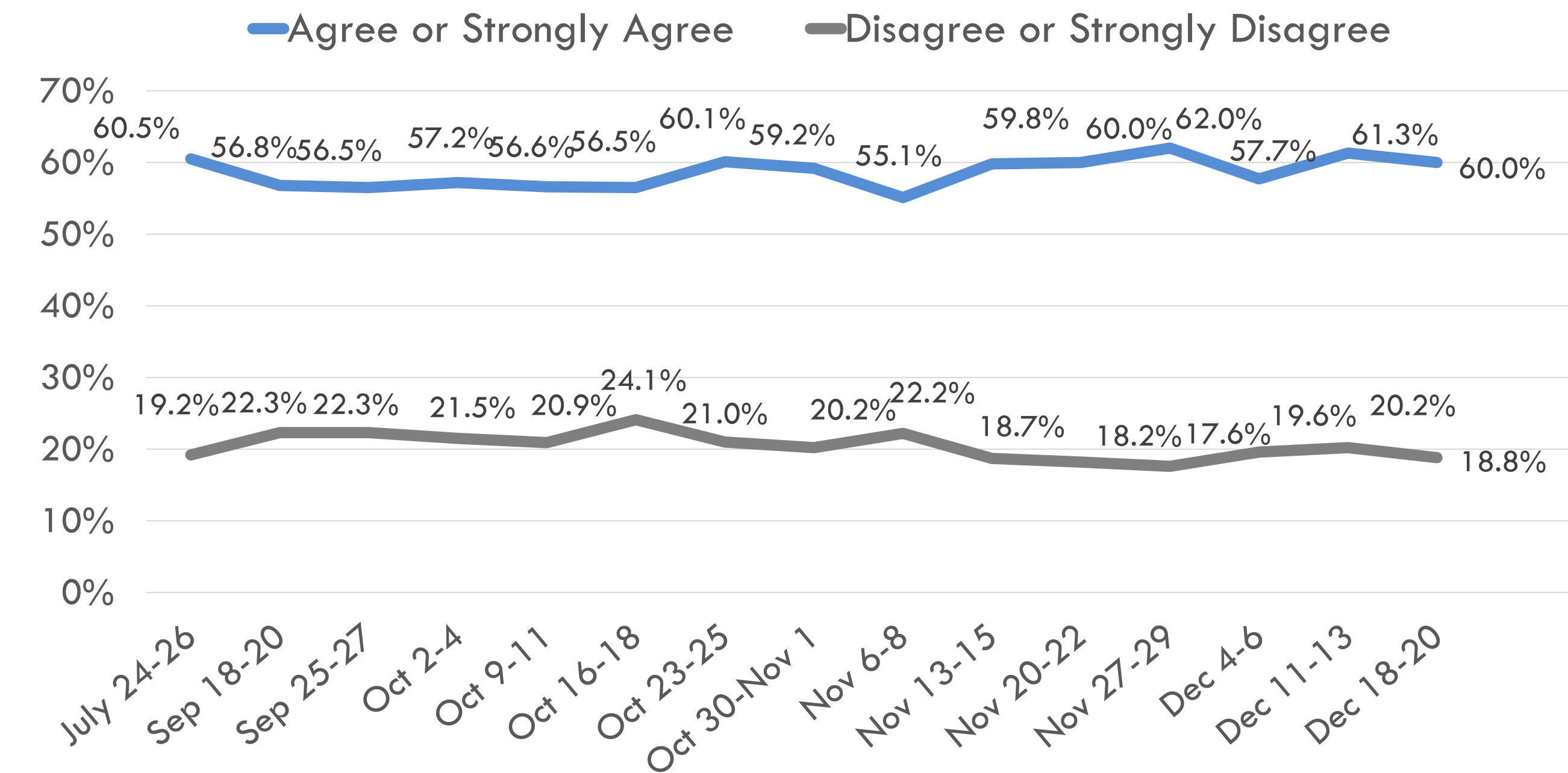
How much do you agree with the following statement?

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



(Base: Waves 20, 28-41 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 and 1,201 completed surveys.)

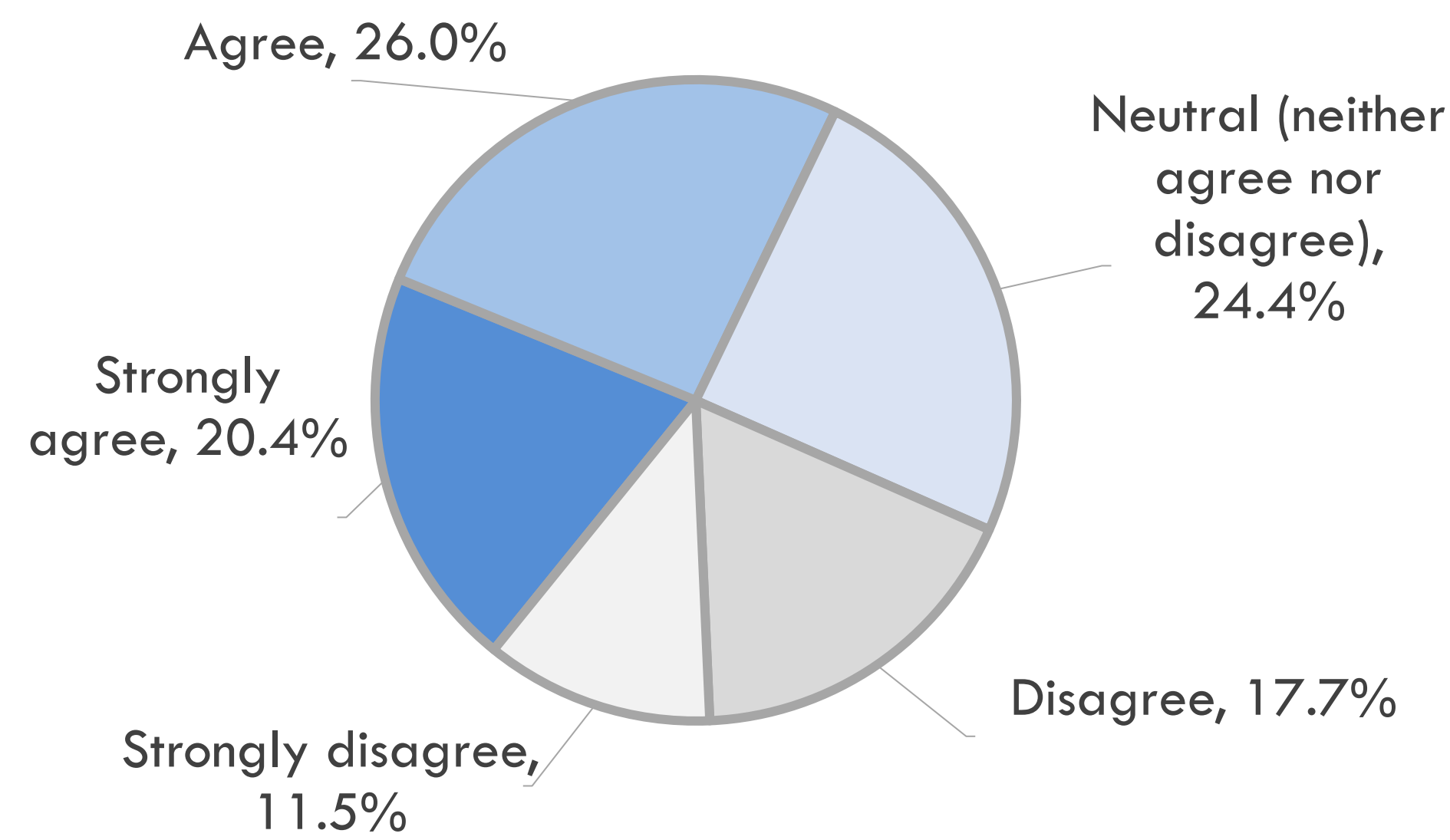
Historical data



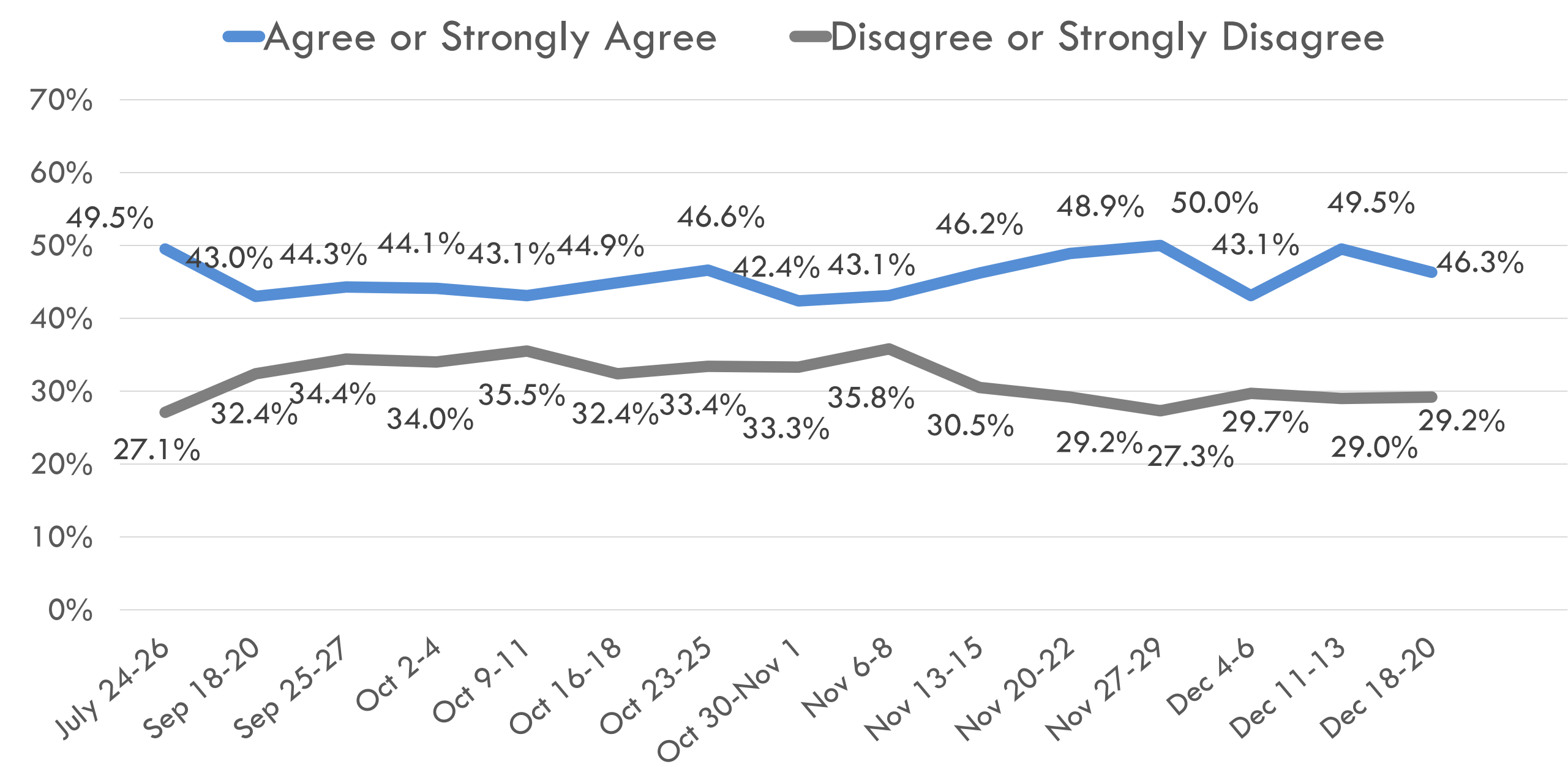
LOSS OF INTEREST IN TRAVEL

How much do you agree with the following statement?

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



Historical data

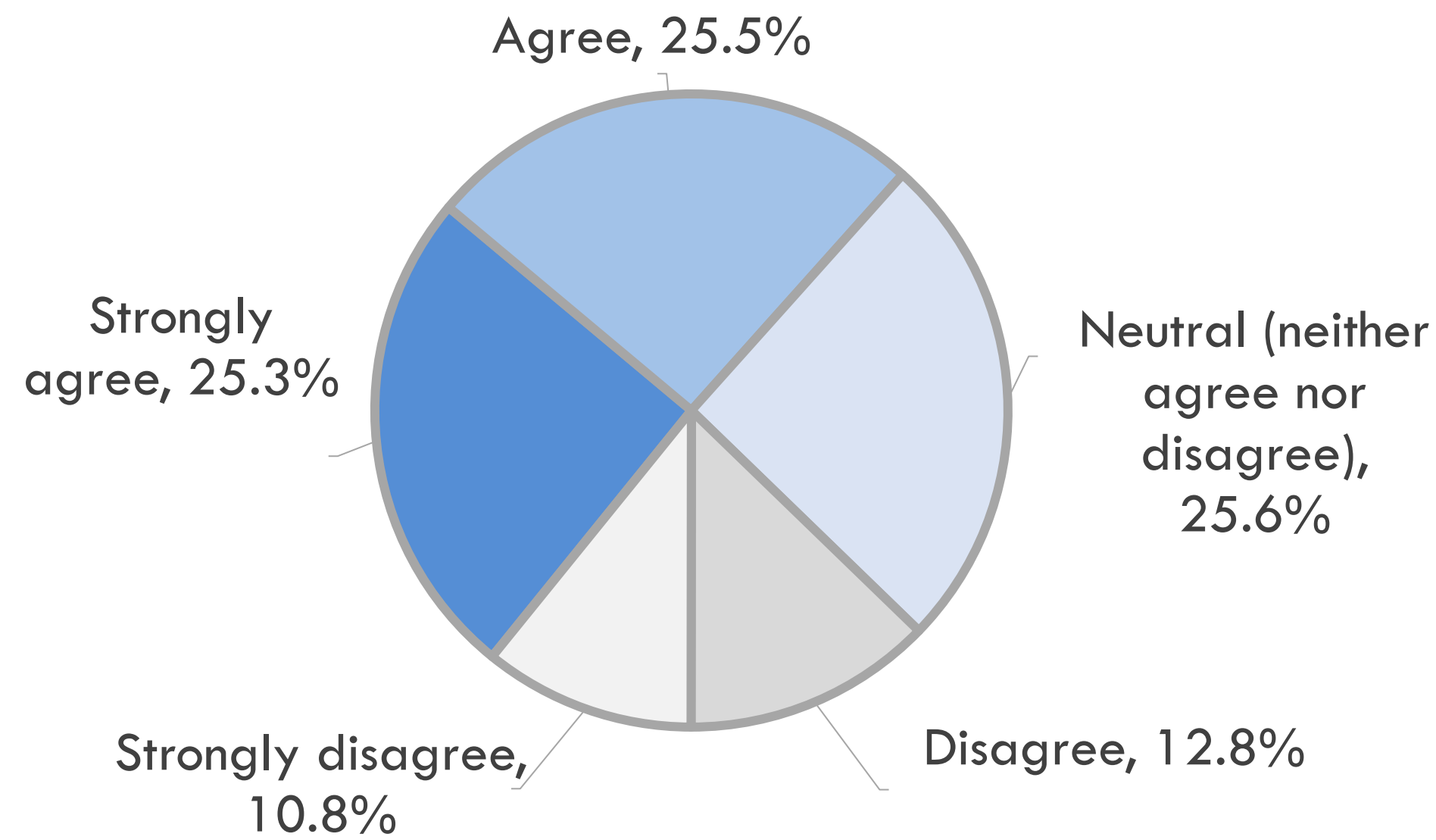


(Base: Waves 20, 28-41 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206 and 1,201 completed surveys.)

TRAVEL GUILT

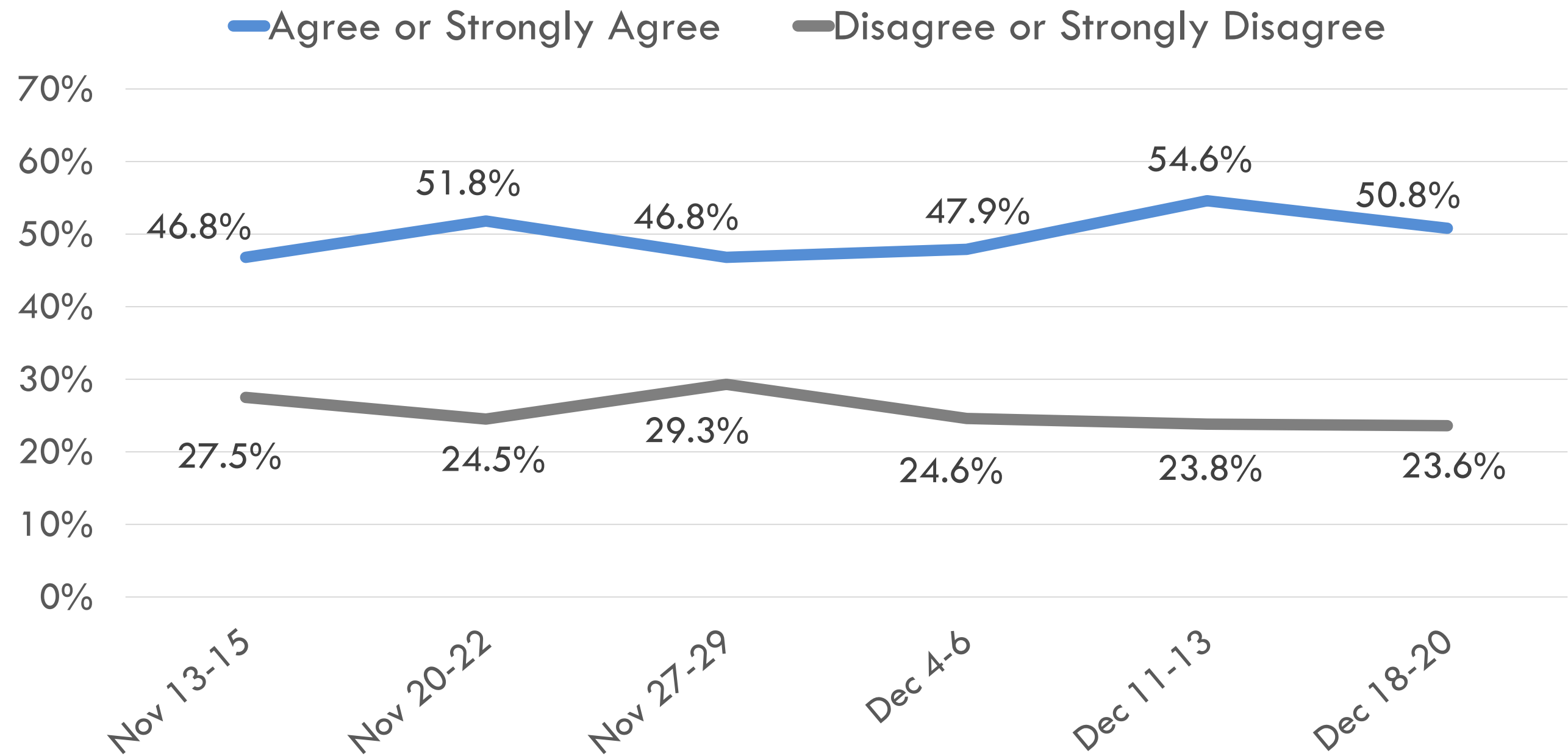
How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



(Base: Waves 36-41 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206 and 1,201 completed surveys.)

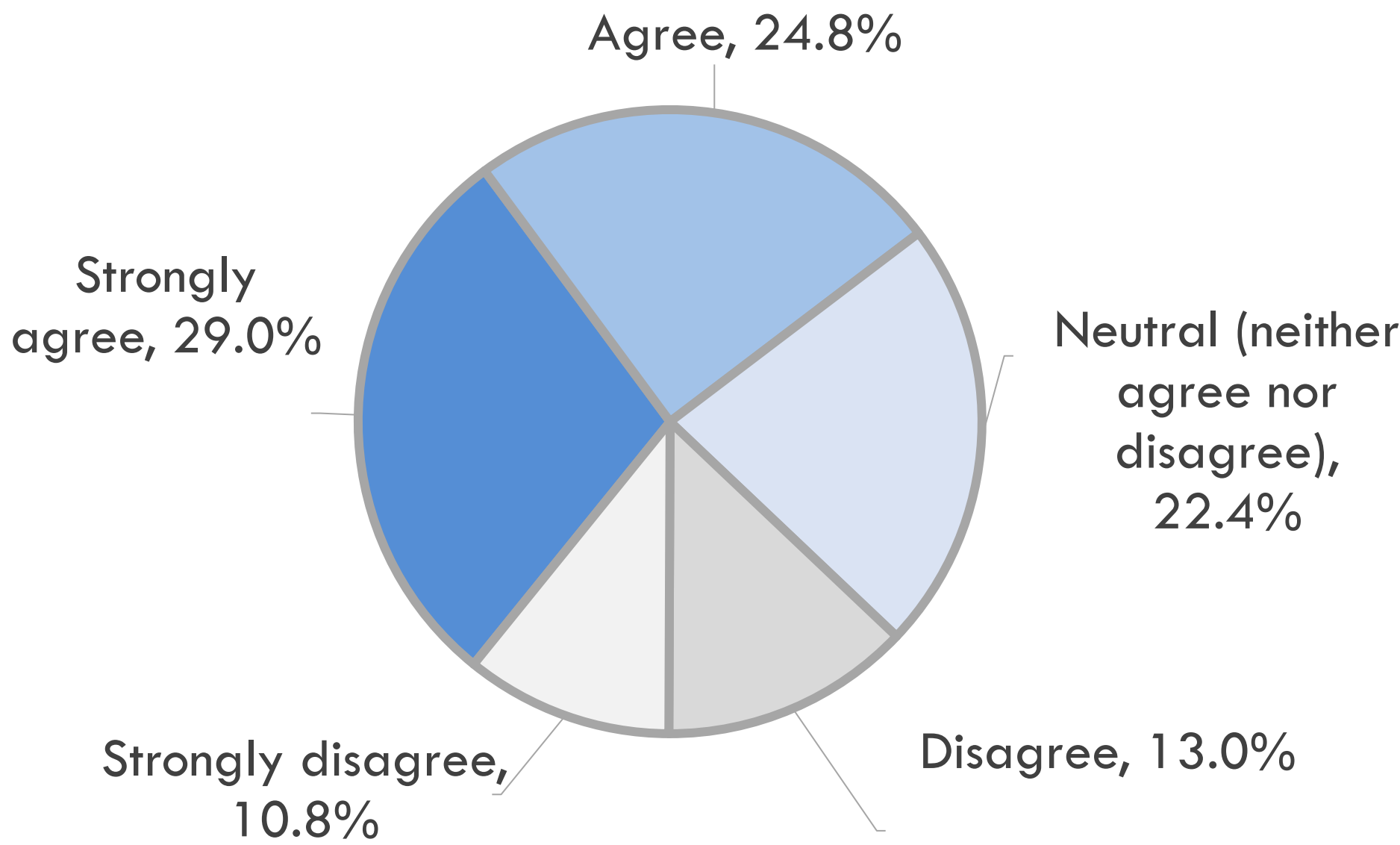
Historical data



TRAVEL AS AN ESSENTIAL NEED ONLY

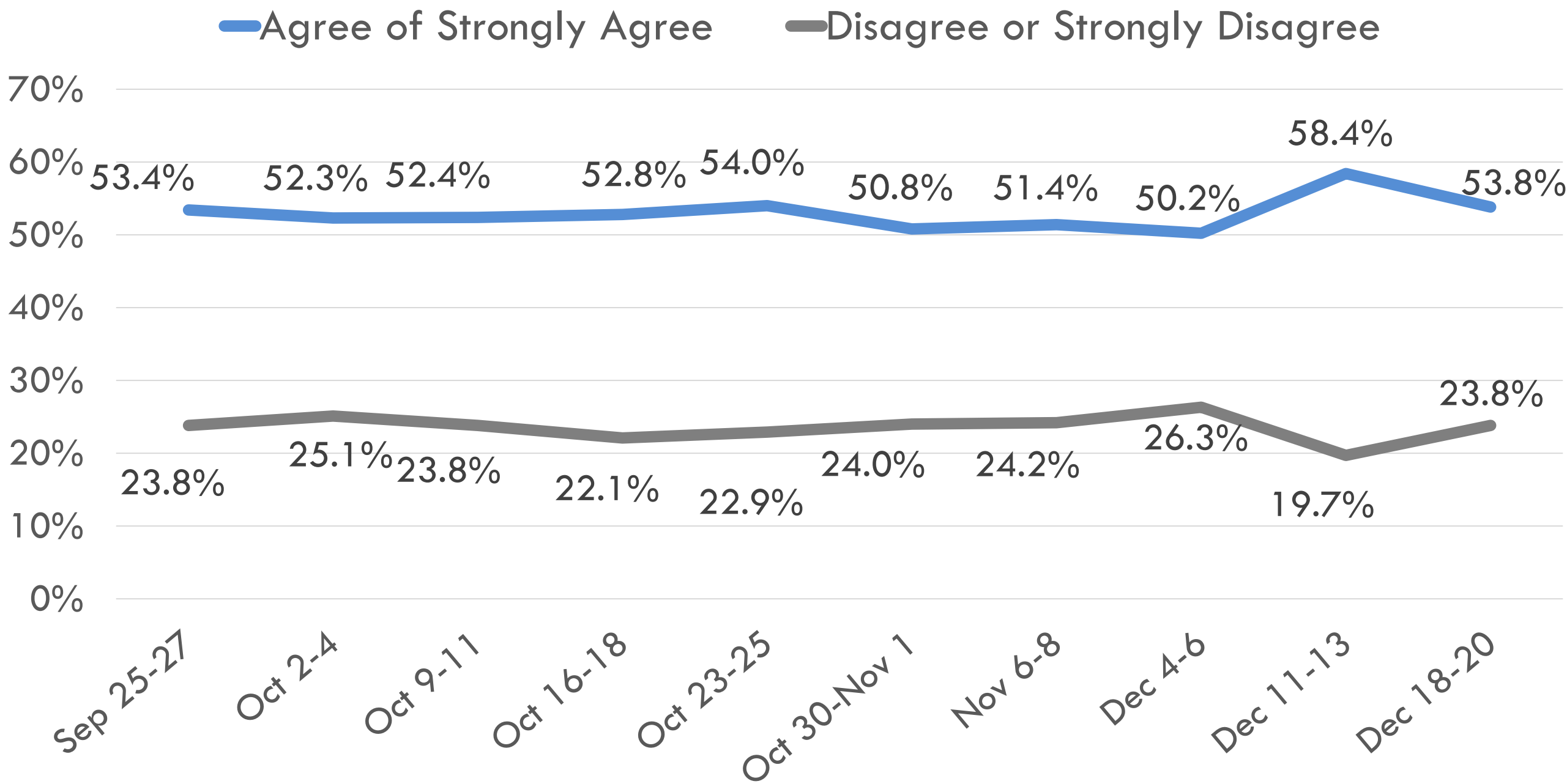
How much do you agree with the following statement?

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



(Base: Waves 29-35, 39-41 data. All respondents, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,204, 1,206 and 1,201 completed surveys.)

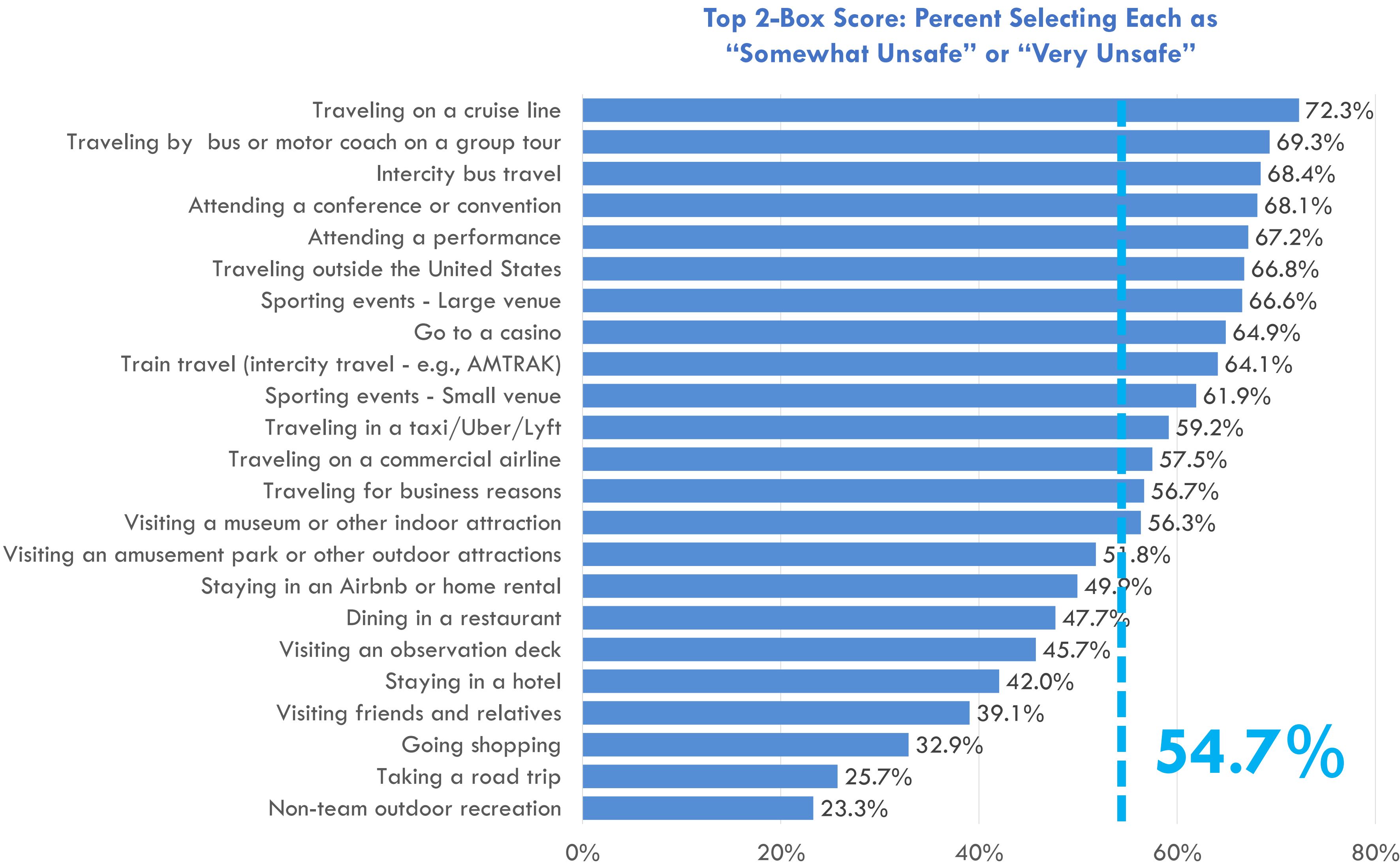
Historical data



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 41)

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

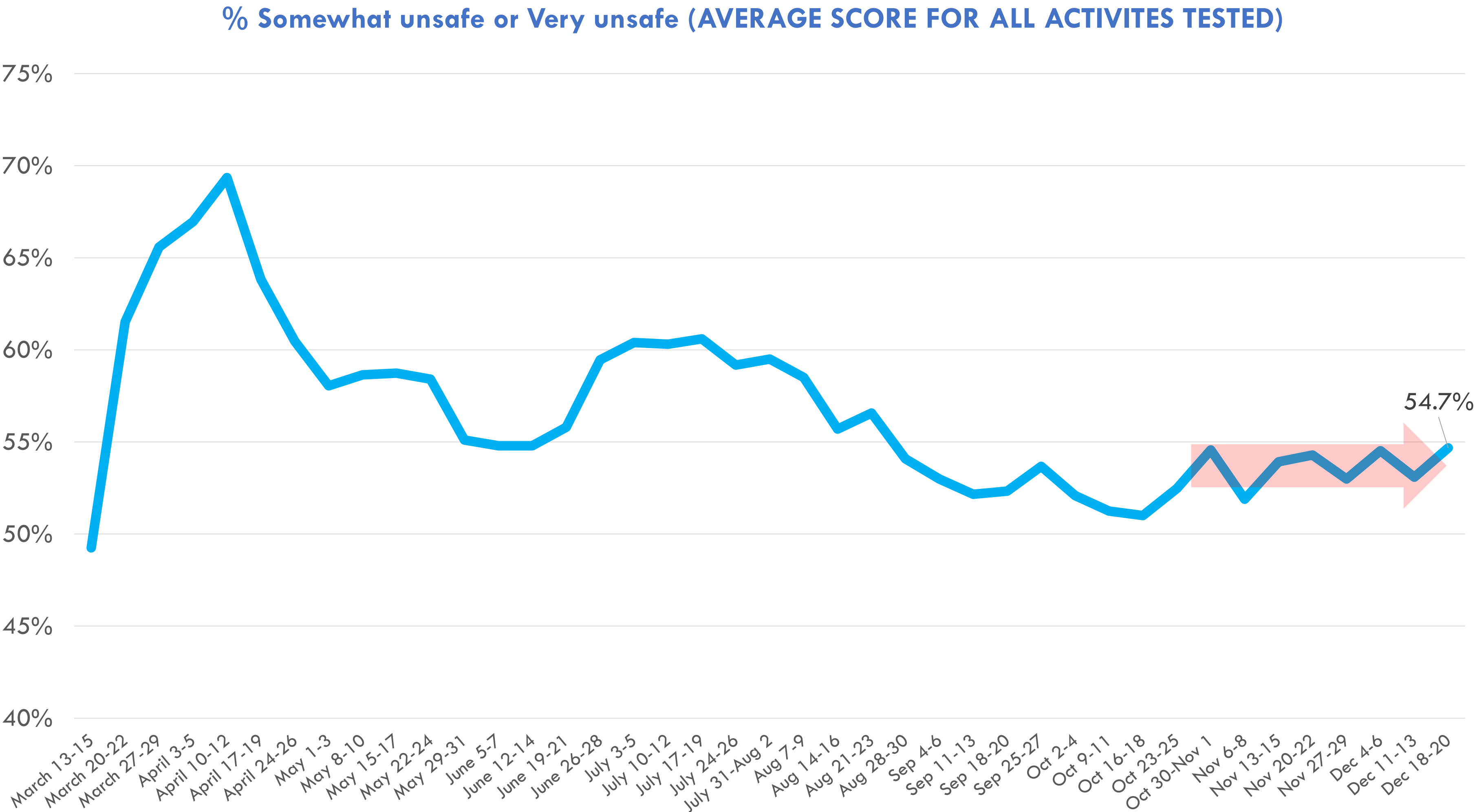
(Base: Wave 41 data. All respondents, 1,201 completed surveys.
Data collected Dec 18-20, 2020)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-41 COMPARISON)

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

(Base: Waves 1-41. 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 and 1,201 completed surveys.)

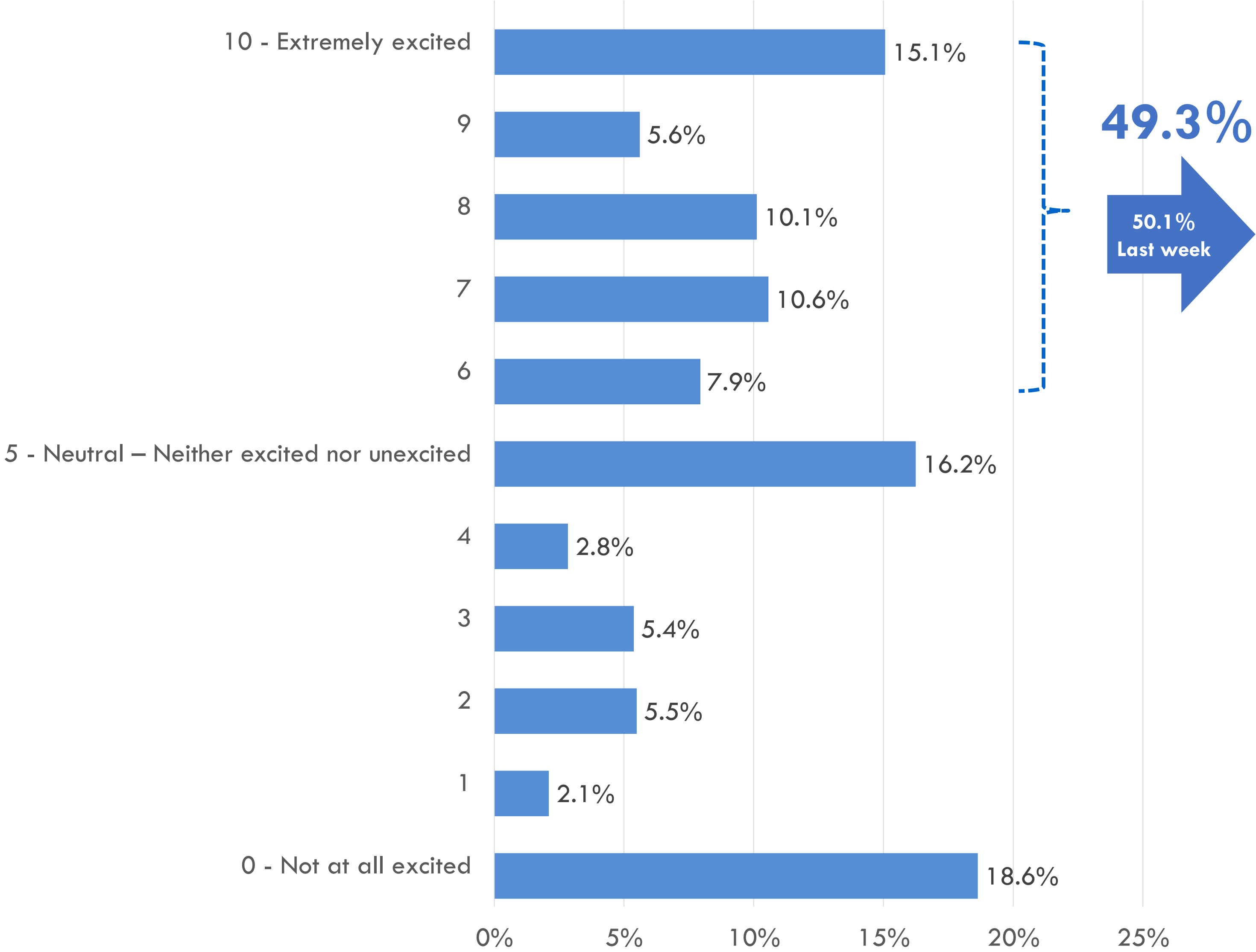


EXCITEMENT TO TRAVEL NOW

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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

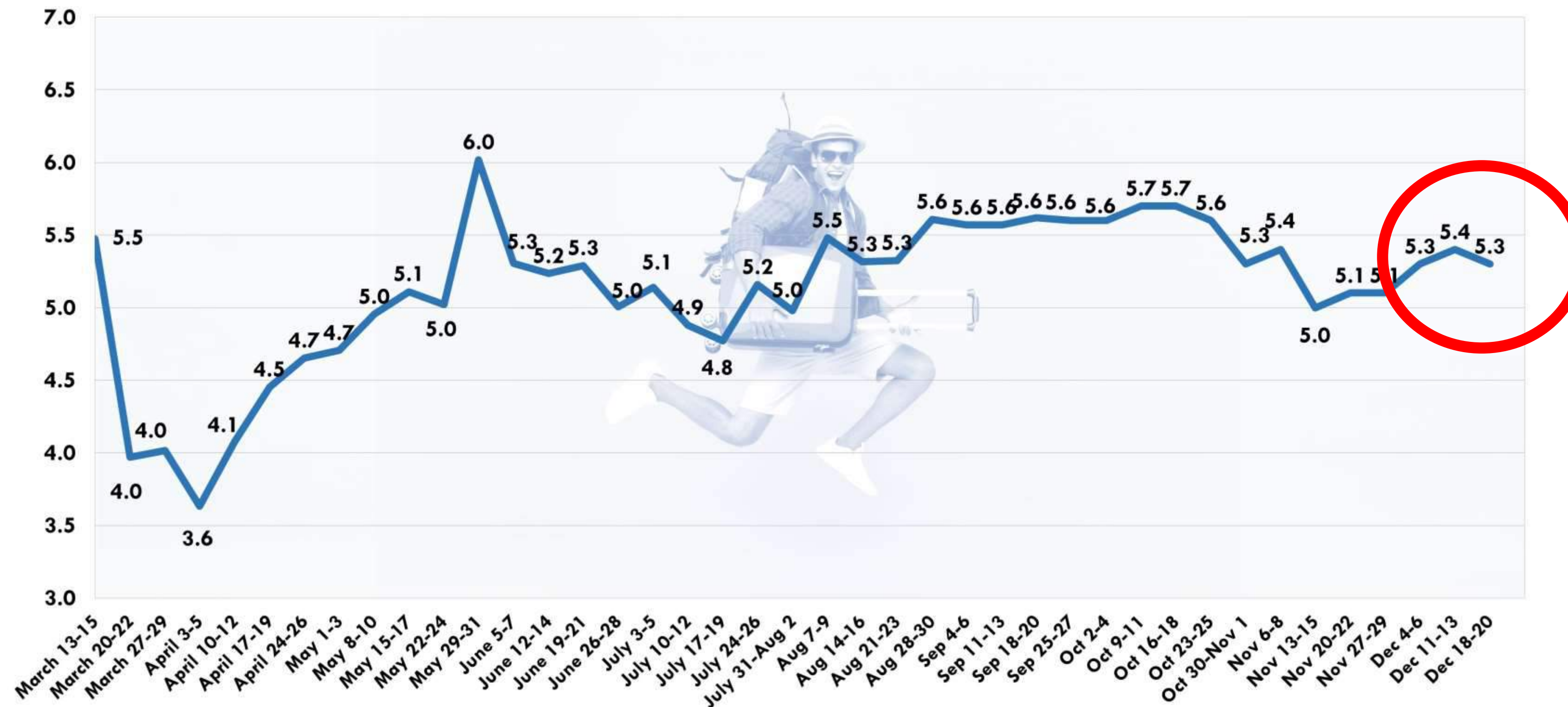


EXCITEMENT TO TRAVEL RIGHT NOW

MARCH 13 – DECEMBER 20



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



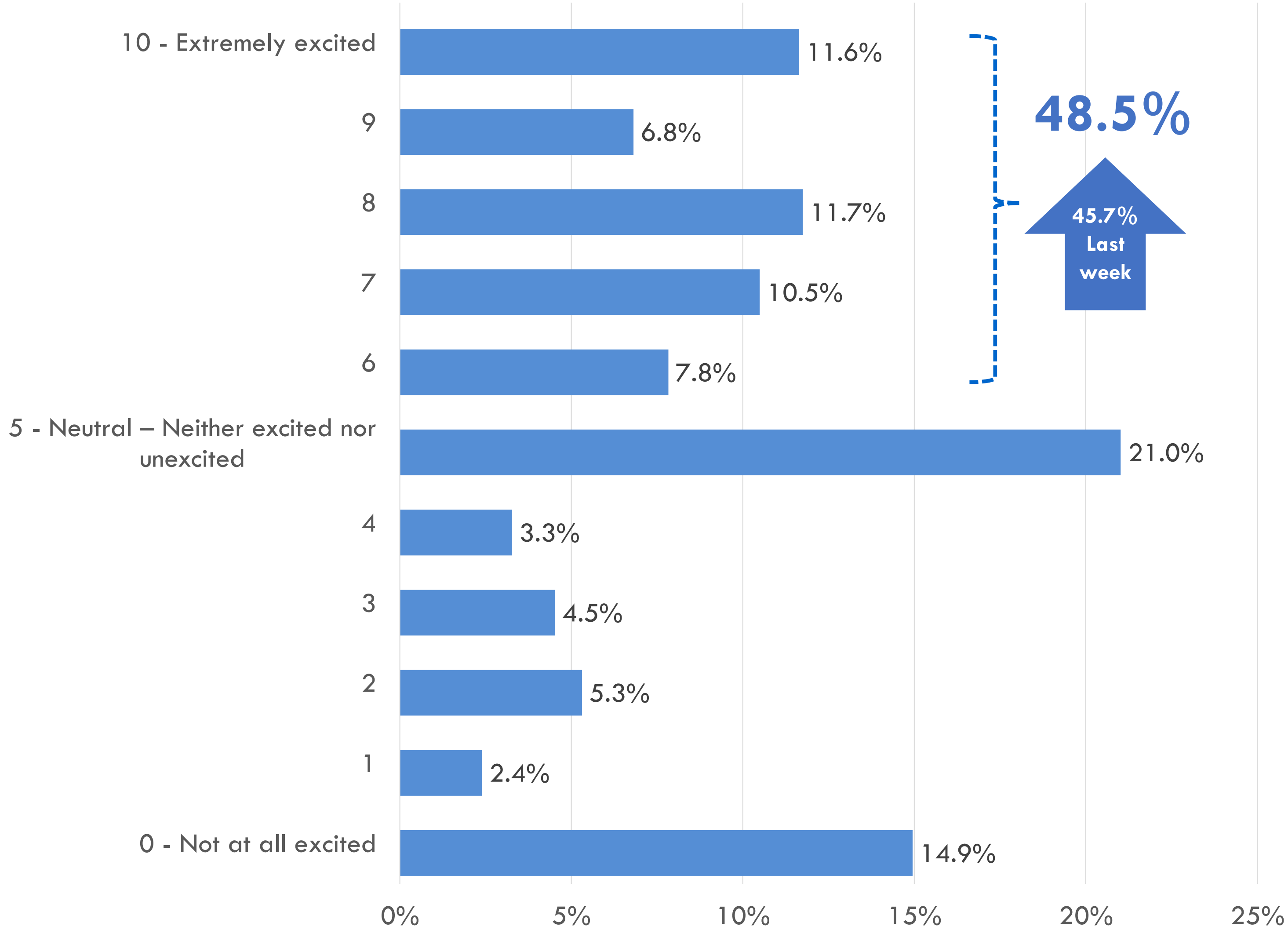
QUESTION: IMAGINE THAT A GOOD FRIEND (OR CLOSE FAMILY MEMBER) ASKS YOU TO TAKE A WEEKEND GETAWAY WITH THEM SOMETIME IN THE NEXT MONTH. HOW EXCITED WOULD YOU BE TO GO? (ASSUME THE GETAWAY IS TO A PLACE YOU WANT TO VISIT)

(Base: Waves 1-41. 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 and 1,201 completed surveys.

OPENNESS TO TRAVEL INSPIRATION

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

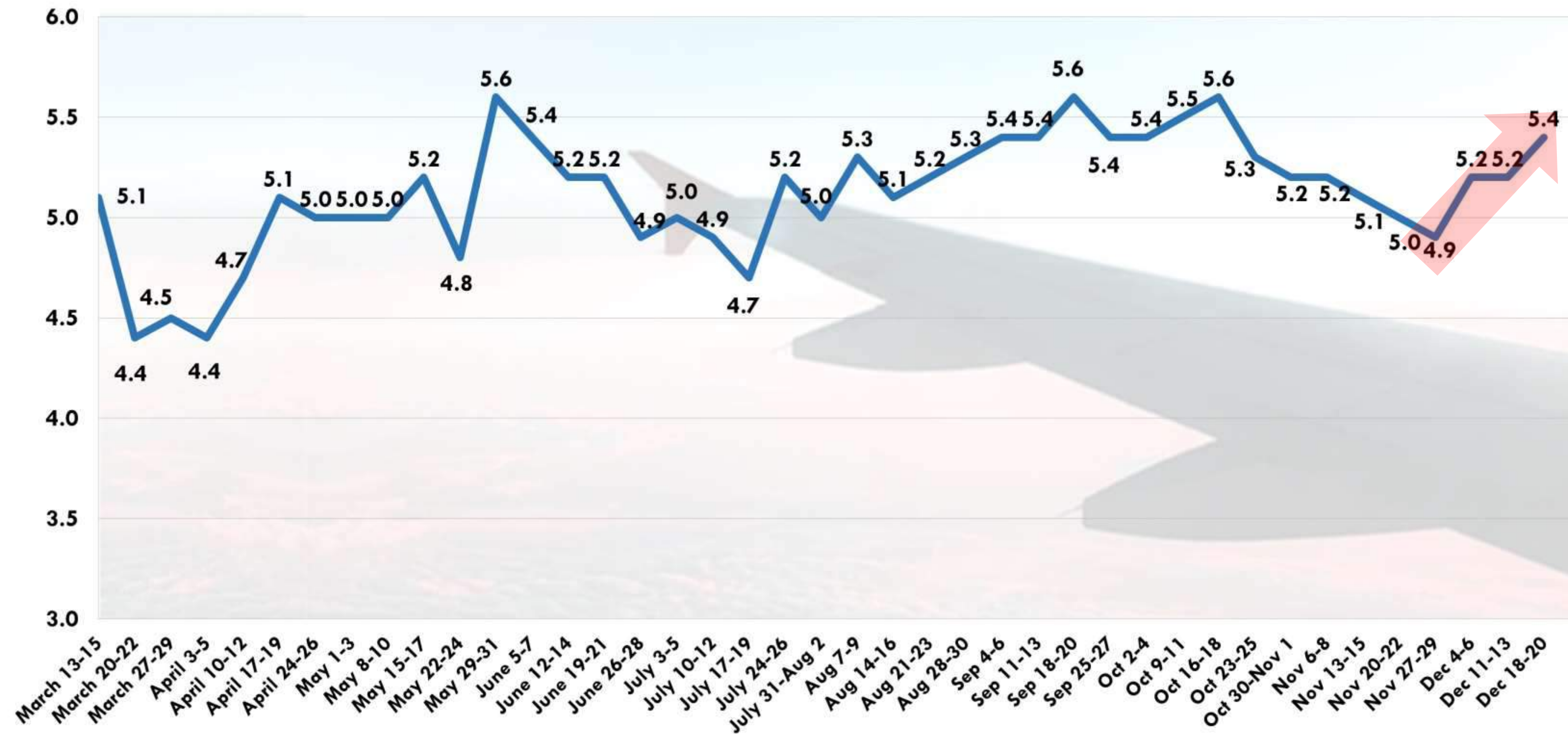


OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – DECEMBER 20



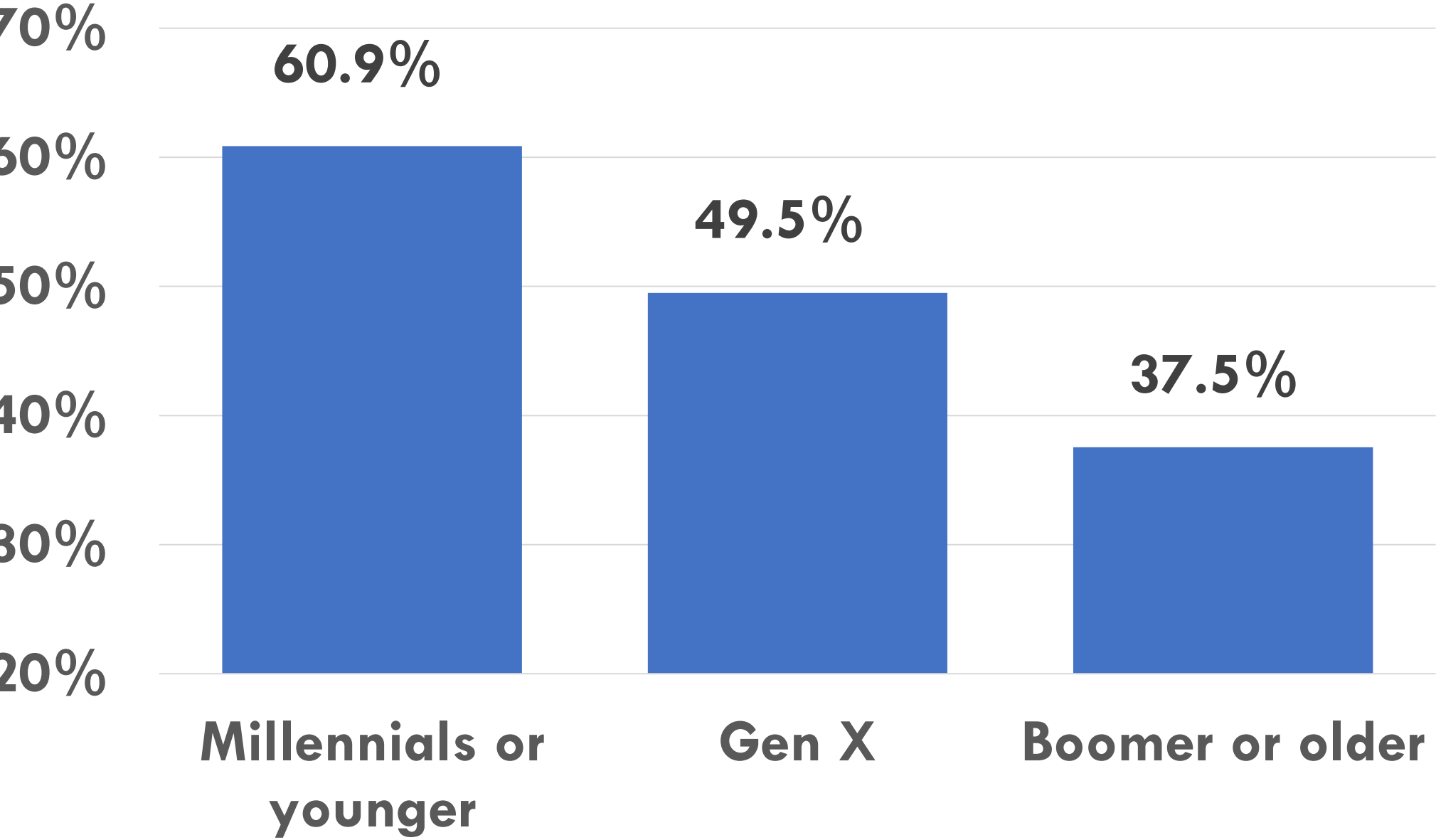
OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE)



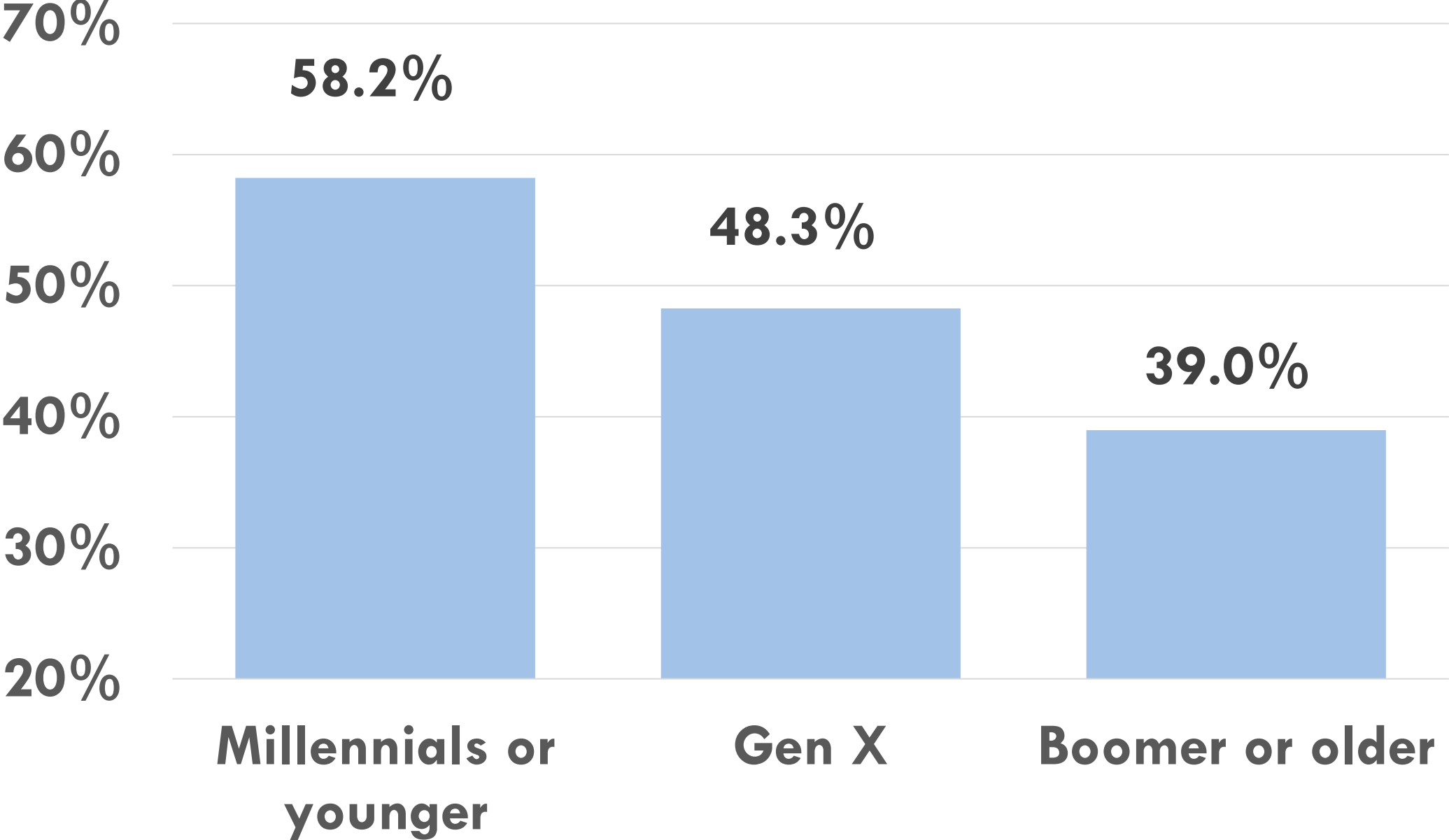
QUESTION: AT THIS MOMENT, HOW INTERESTED ARE YOU IN LEARNING ABOUT NEW, EXCITING TRAVEL EXPERIENCES OR DESTINATIONS TO VISIT?

(Base: Waves 1-41. 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 and 1,201 completed surveys.

Excitement to Travel Right Now (6-10)



Openness to Travel Inspiration(6-10)

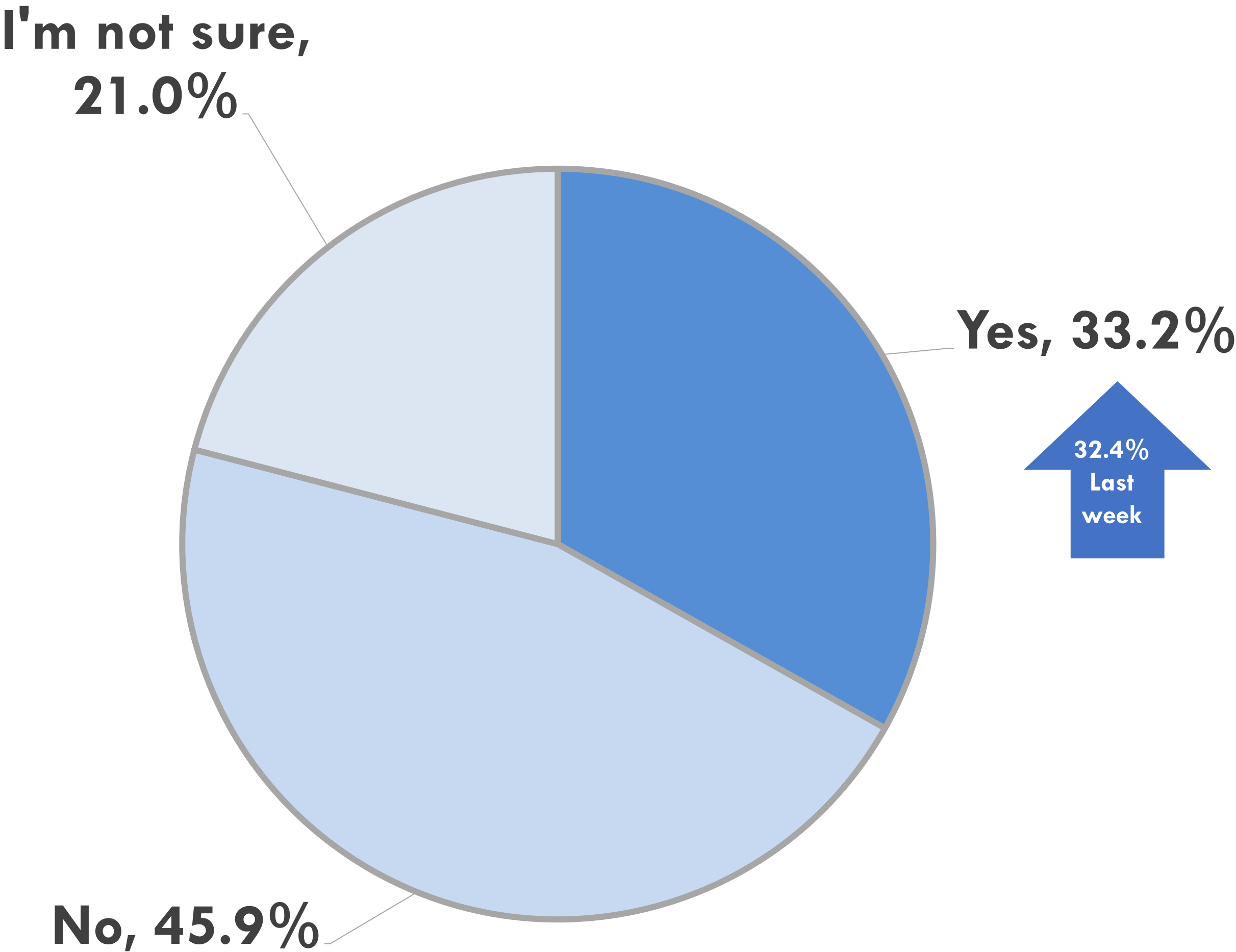


COVID-19 RELATED DESTINATION MEDIA COVERAGE

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 41 data. All respondents, 1,201 completed surveys.)

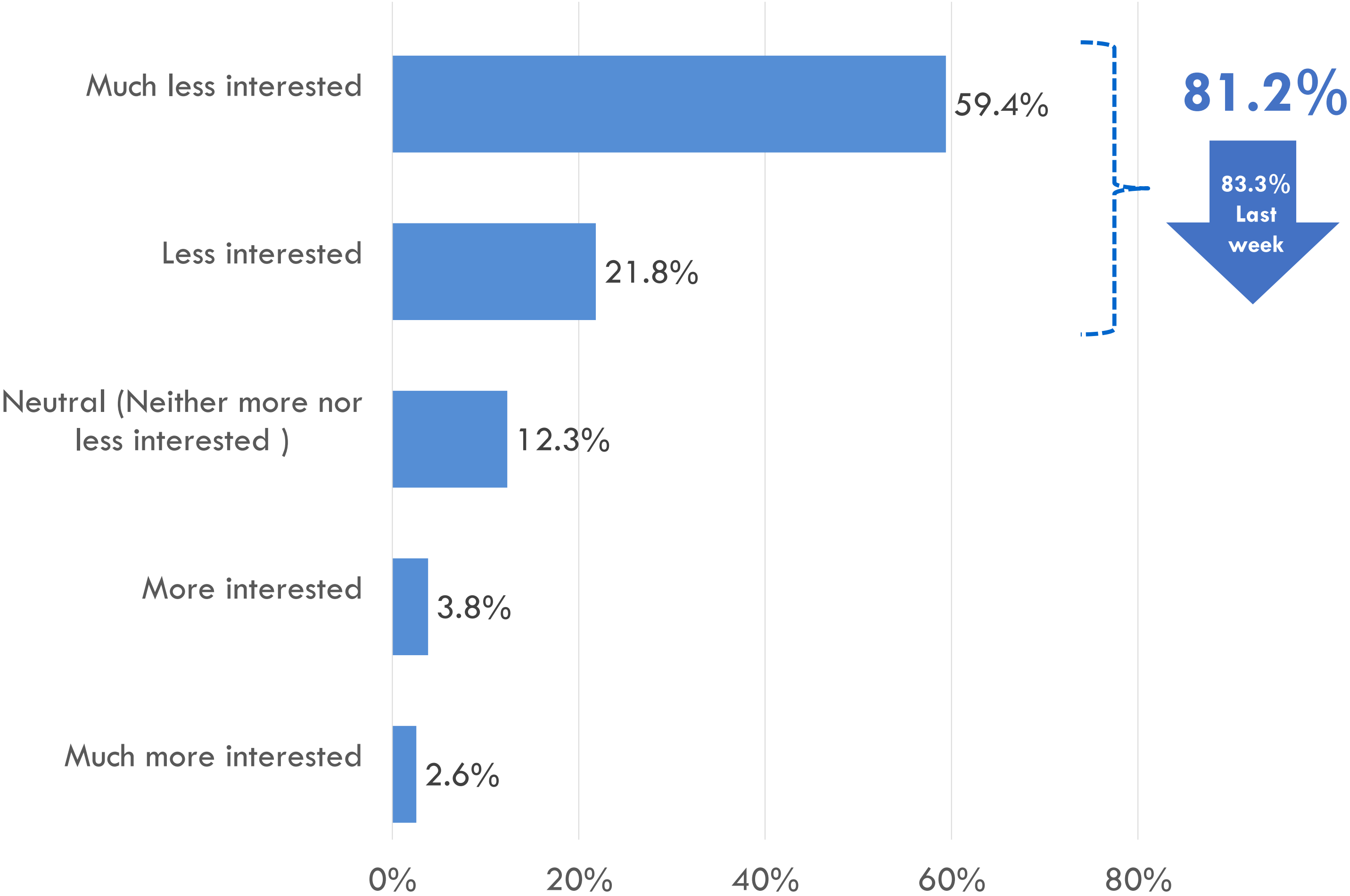


EFFECTS OF COVID-19 MEDIA COVERAGE ON DESTINATIONS

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)

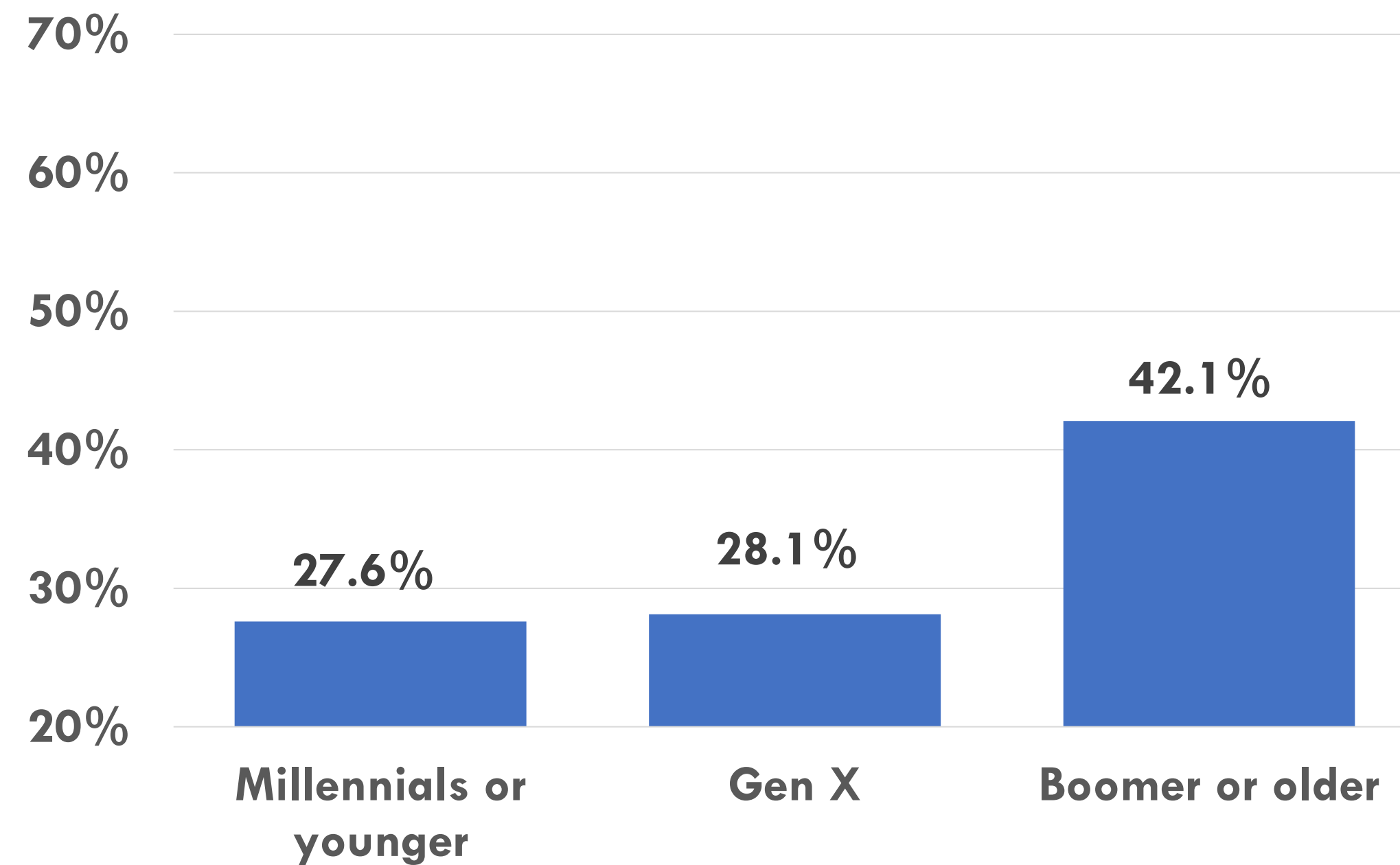
Because of the way people are behaving, I am _____ in visiting.

(Base: Wave 41 data. Respondents who recall COVID-19 related reports in the media about travel destinations, 401 completed surveys. Data collected Dec 18-20, 2020)



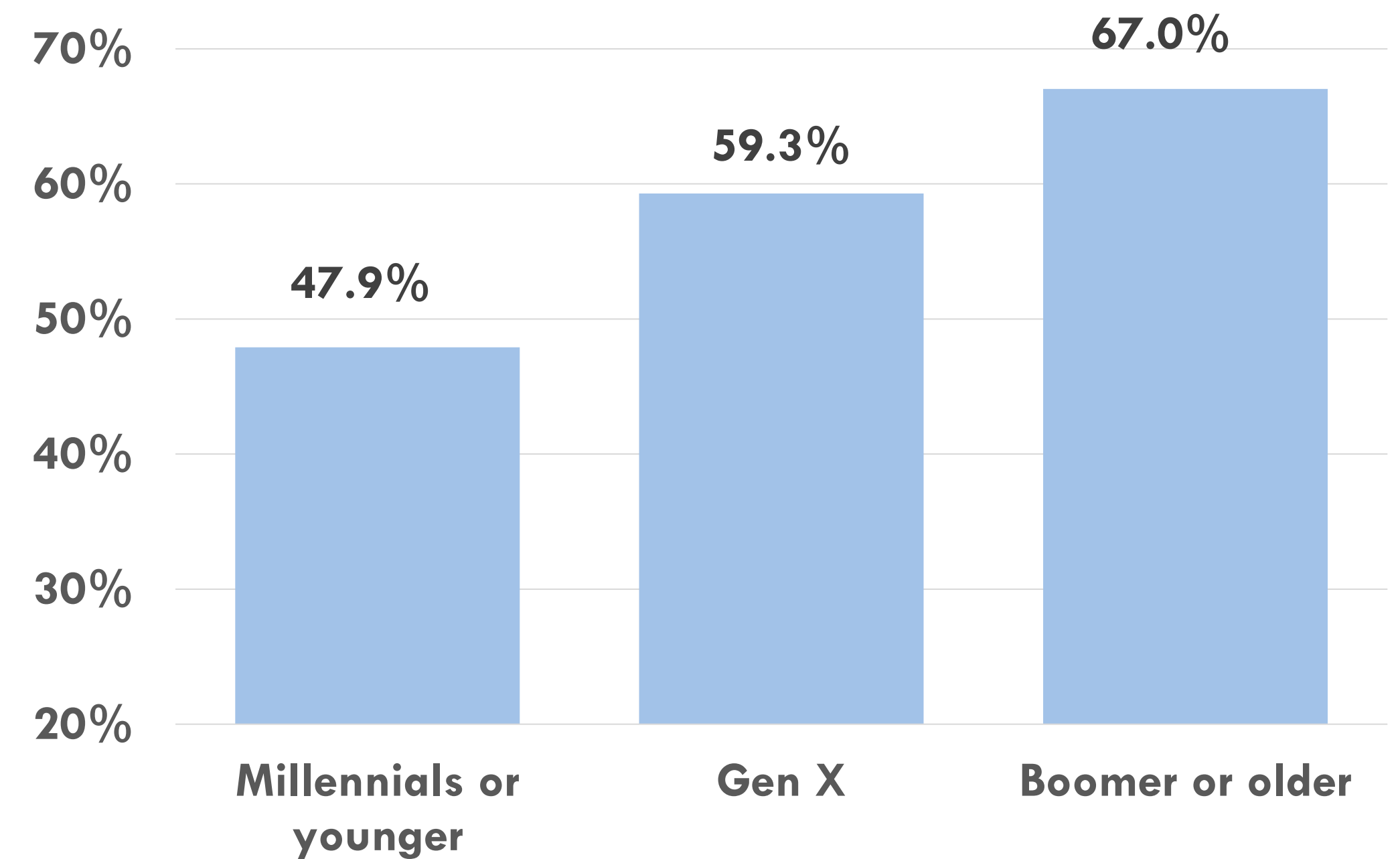
Recalls Negative Media Coverage

(% Yes)



Less Interested in Visiting Destination

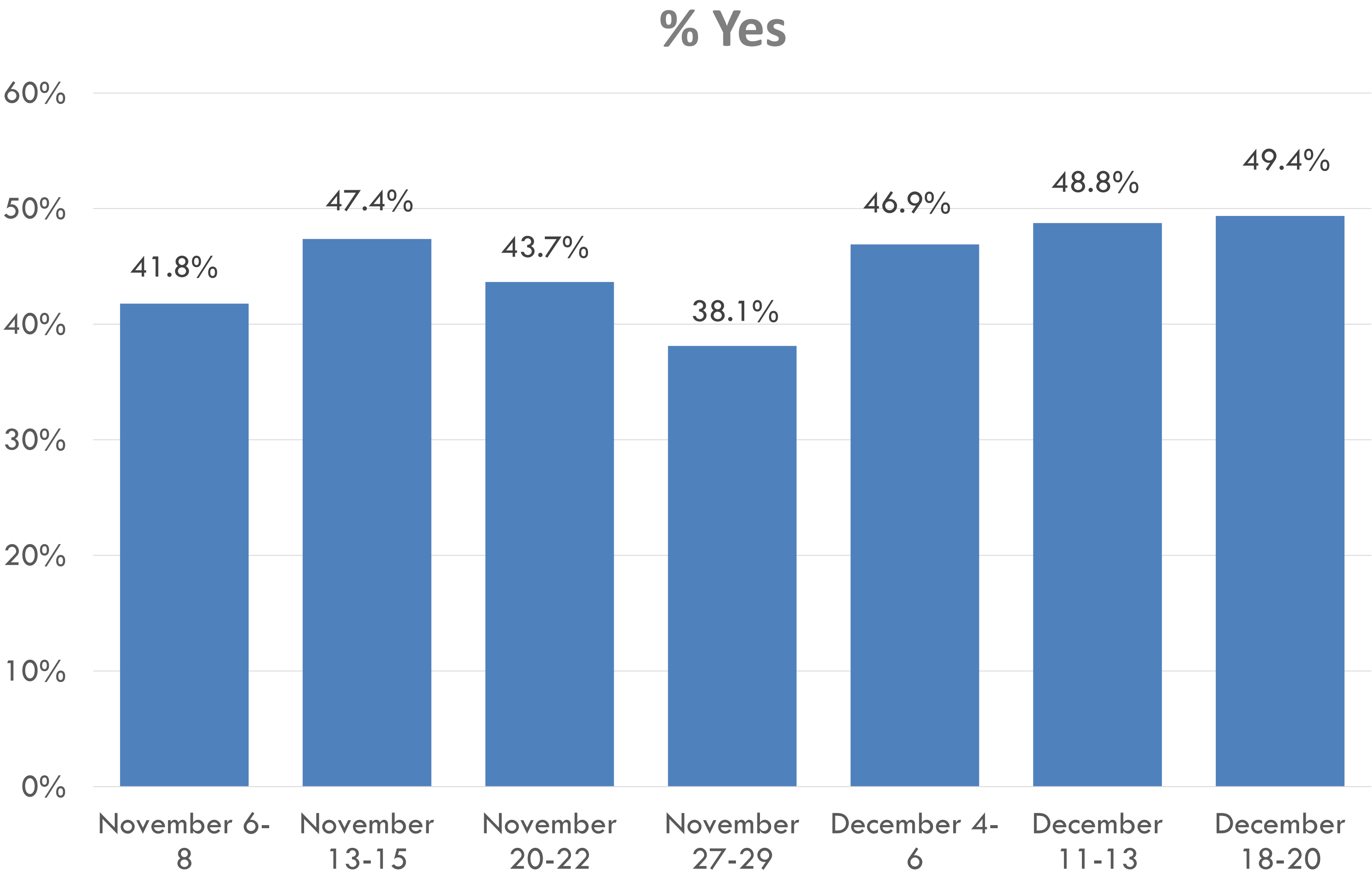
(% Much less interested)



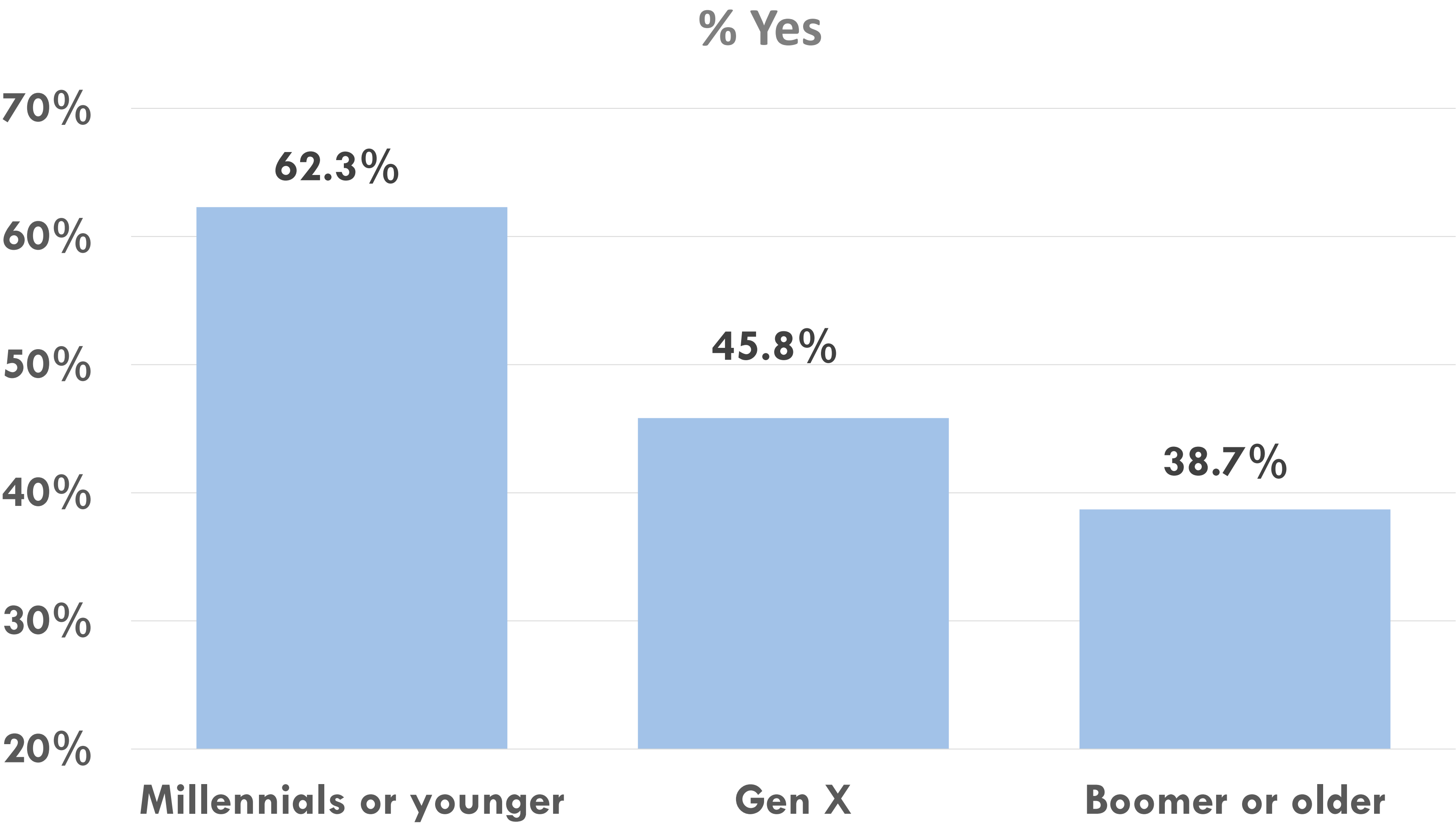
TRIPS CANCELLED OR POSTPONED DUE TO RECENT SURGE IN CASES

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



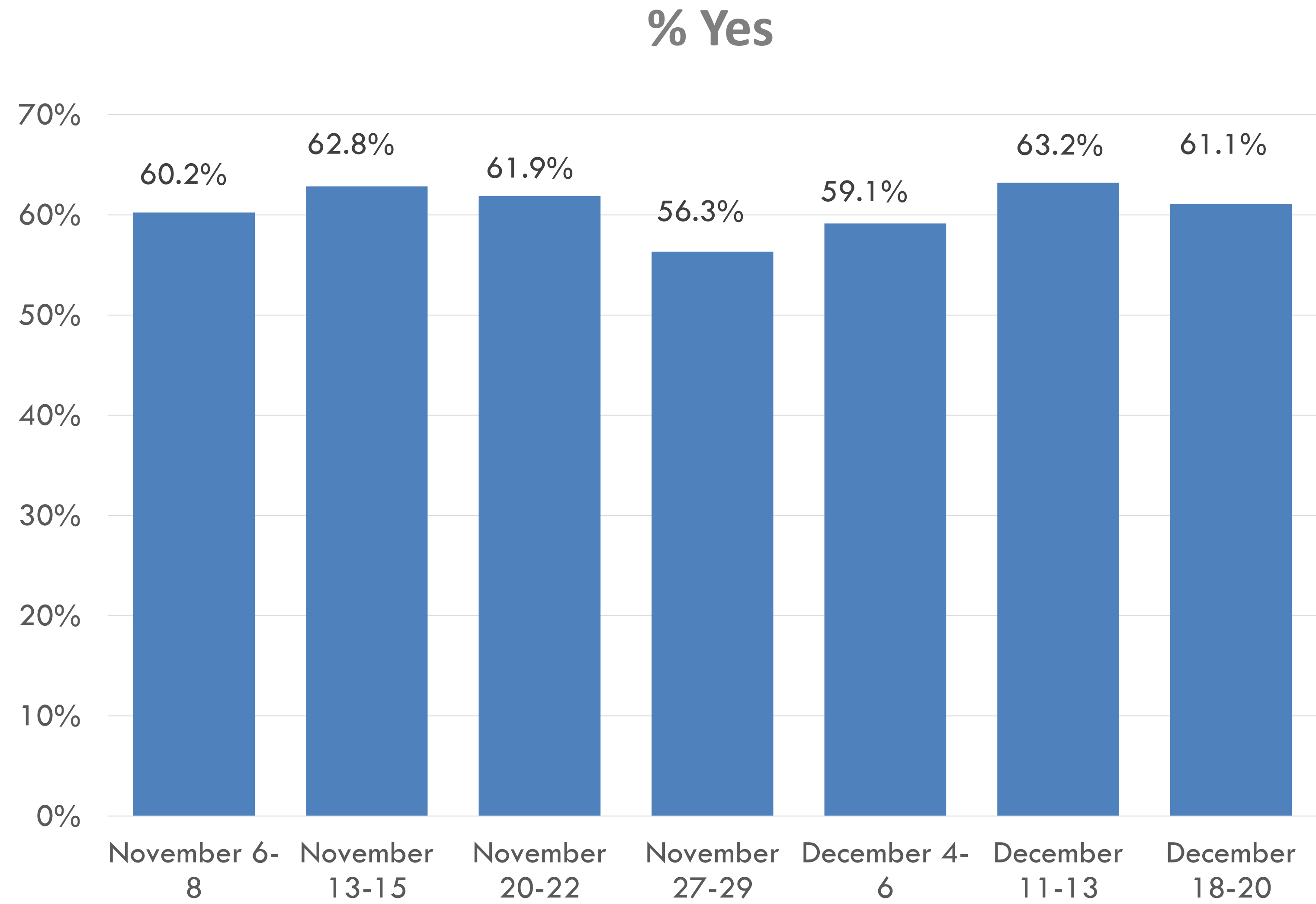
TRIPS CANCELLED OR POSTPONED DUE TO RECENT SURGE IN CASES



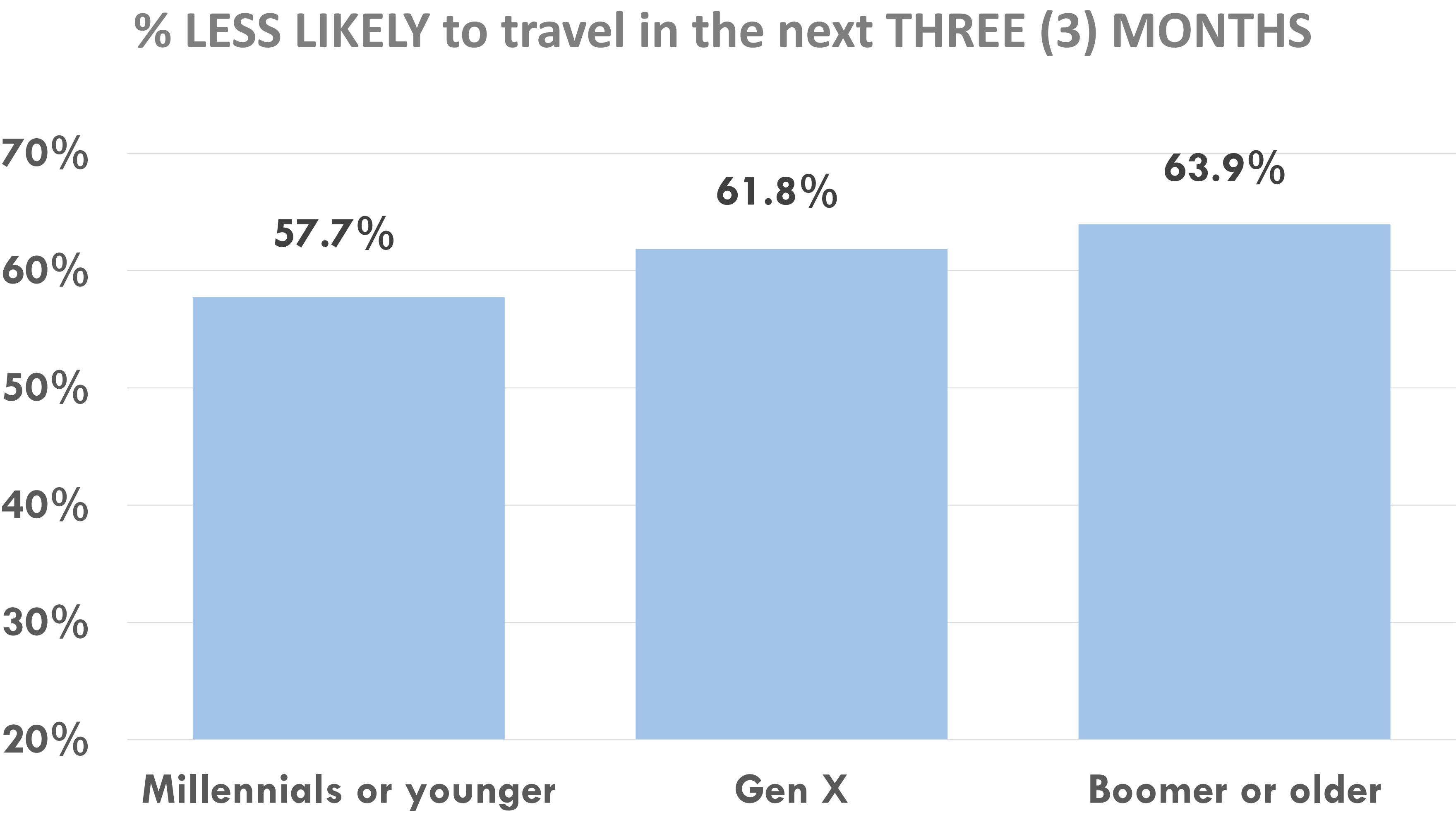
CASE SURGE'S IMPACT ON LIKELIHOOD TO TRAVEL

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

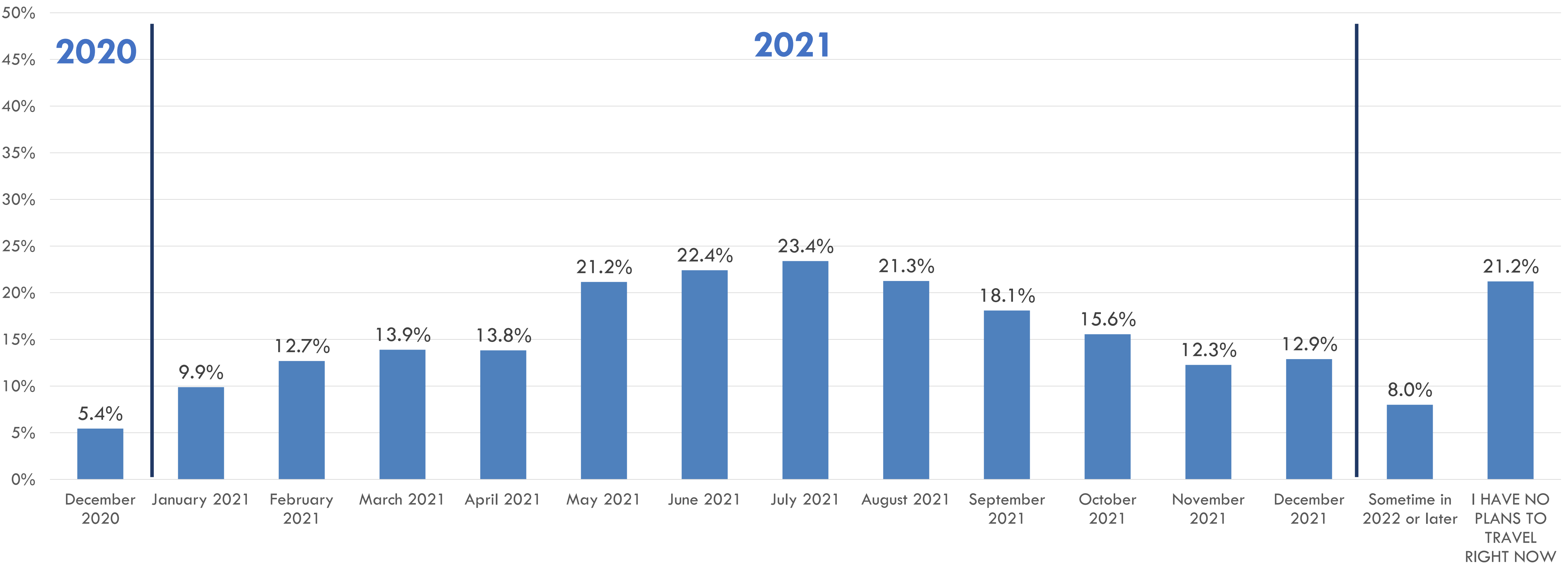


CASE SURGE'S IMPACT ON LIKELIHOOD TO TRAVEL



UPCOMING TRAVEL PLANS

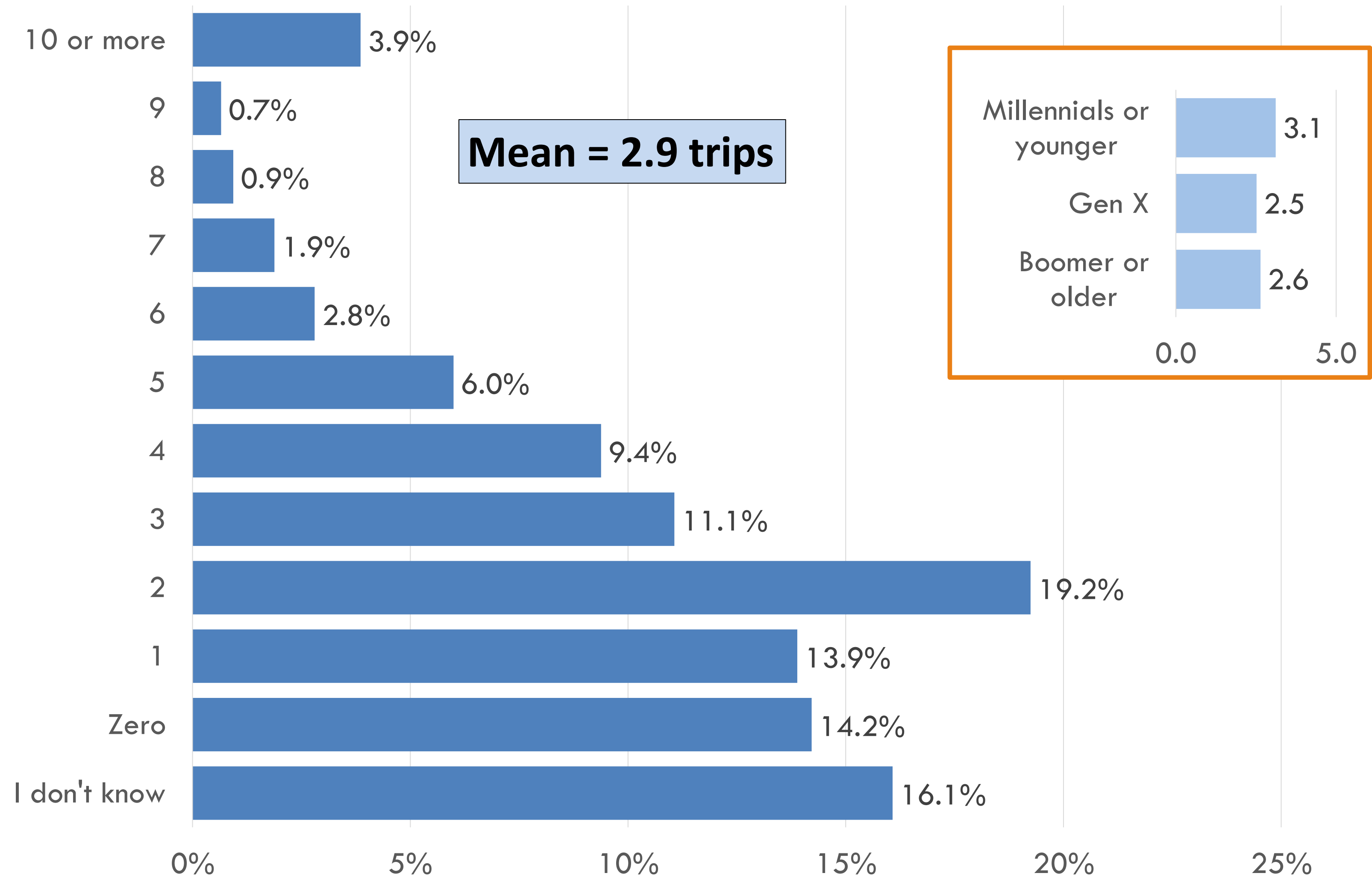
Question: Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (Select all that apply)



EXPECTED LEISURE TRIPS IN 2021

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) will you take next year (2021)? (Select one)

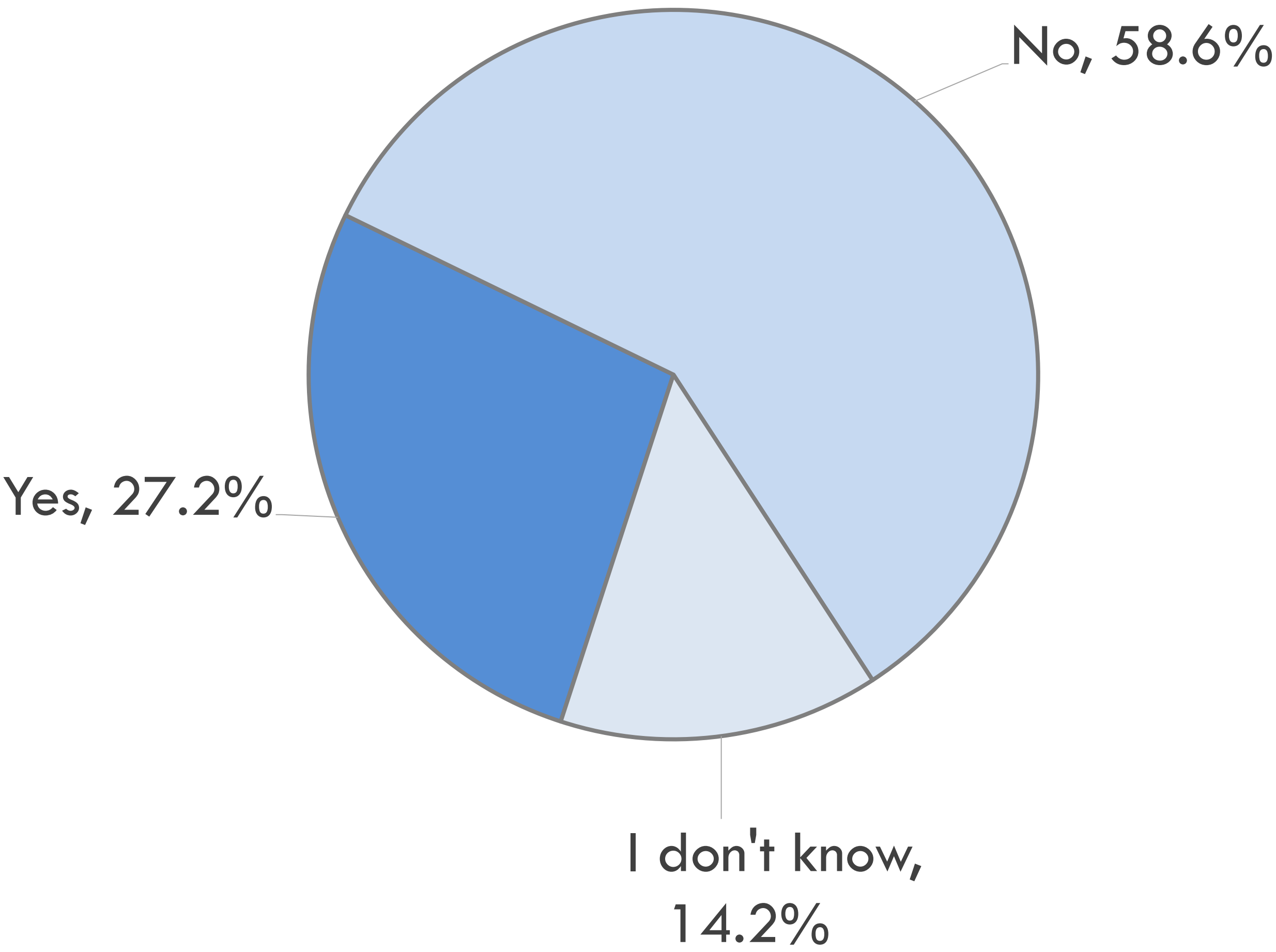
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



EXPECTED INTERNATIONAL TRAVEL

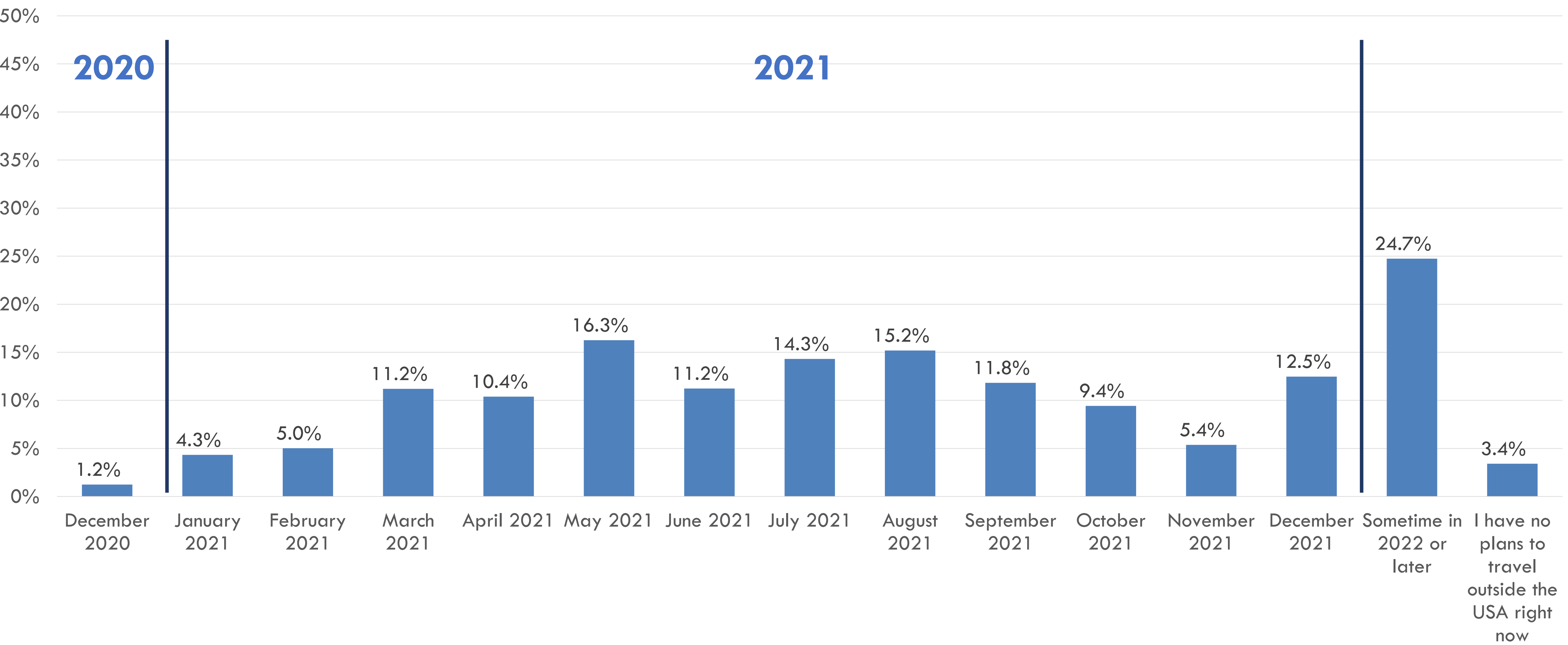
Question: Do you expect to take any international trips (i.e., travel outside the United States) in the NEXT TWO (2) YEARS? (Select one)

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



ANTICIPATED TIMING FOR NEXT INTERNATIONAL TRIP

Question: In what month do you anticipate you will take your next international trip (i.e., to a place outside the United States)?
(Select one)

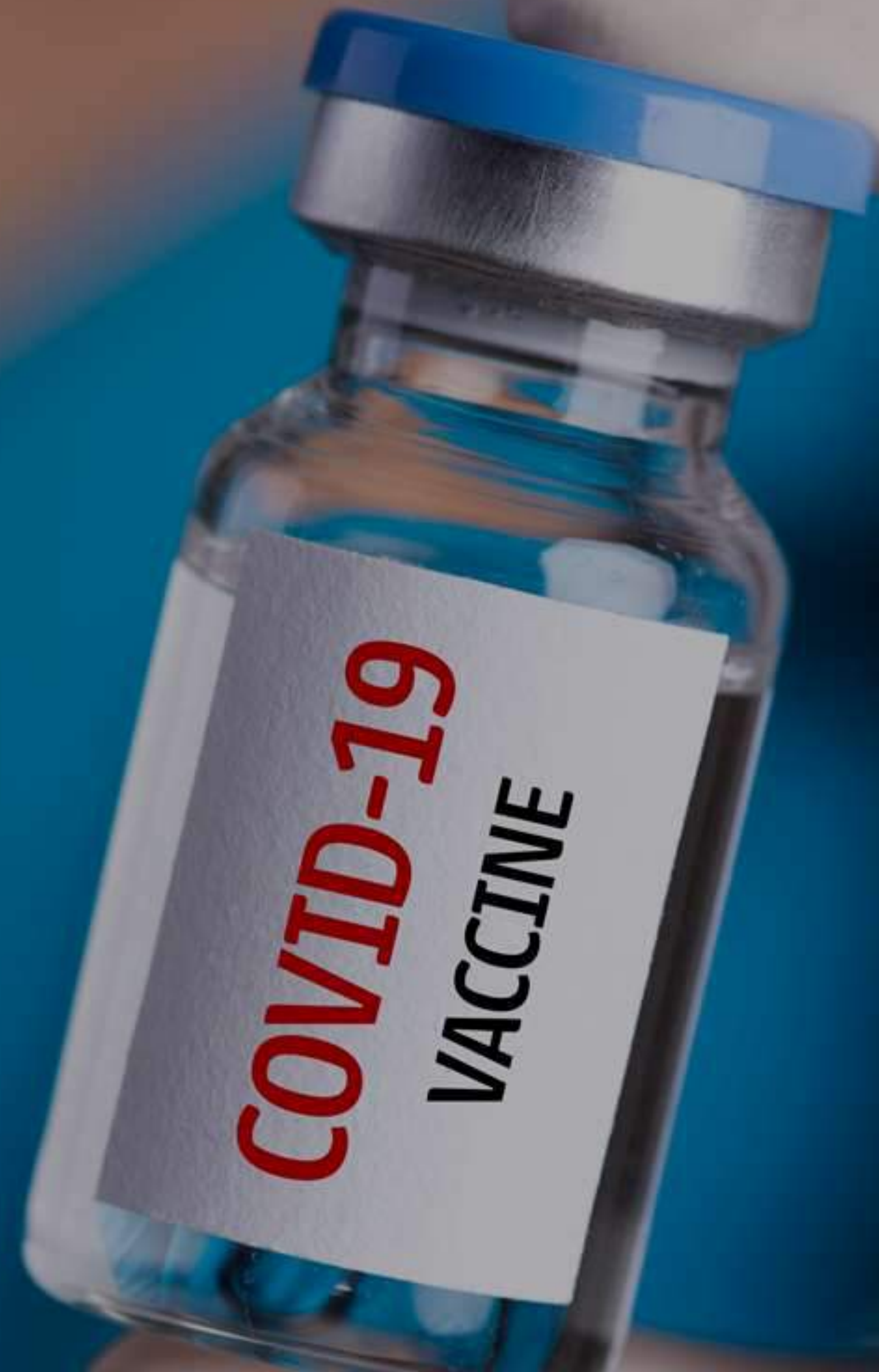


A woman with long brown hair, wearing a white knit beanie and a white fur-trimmed coat, is drinking from a white cup with a red and green patterned sleeve. She is standing in a snowy outdoor setting, likely a festival or fair, with colorful lights and a string of small flags visible in the background. Snow is falling around her.

Key Takeaways

- After a sustained period of skewing towards readiness between August and November, half of American travelers feel their mindset around travel right now is one of hesitation and delay.
- Half of travelers have cancelled or postponed trips due to recent surges in COVID-19 cases and 61% say this surge has made them less likely to travel in the next 3 months.
- Even so, Americans—particularly younger travelers — are increasingly open to travel inspiration.
- The average traveler plans to take 2.9 leisure trips in 2021, with Millennials planning to take even more trips.
- 27.2% of Americans plan to take an international trip in the next two years—72% of these expected international travelers anticipates taking this trip abroad in 2021.

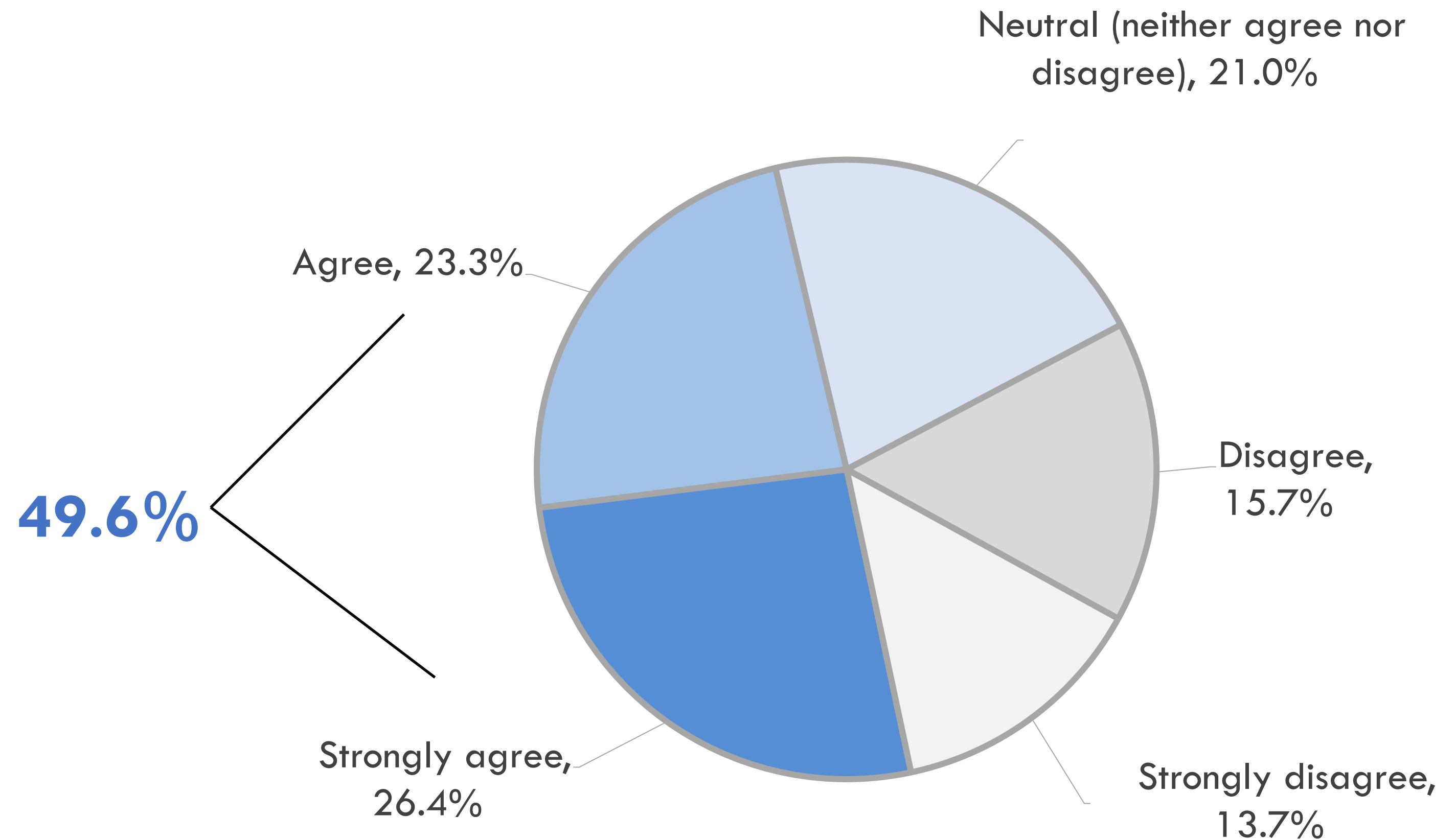
IMPACT OF THE COVID-19 VACCINE ON TRAVEL



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.



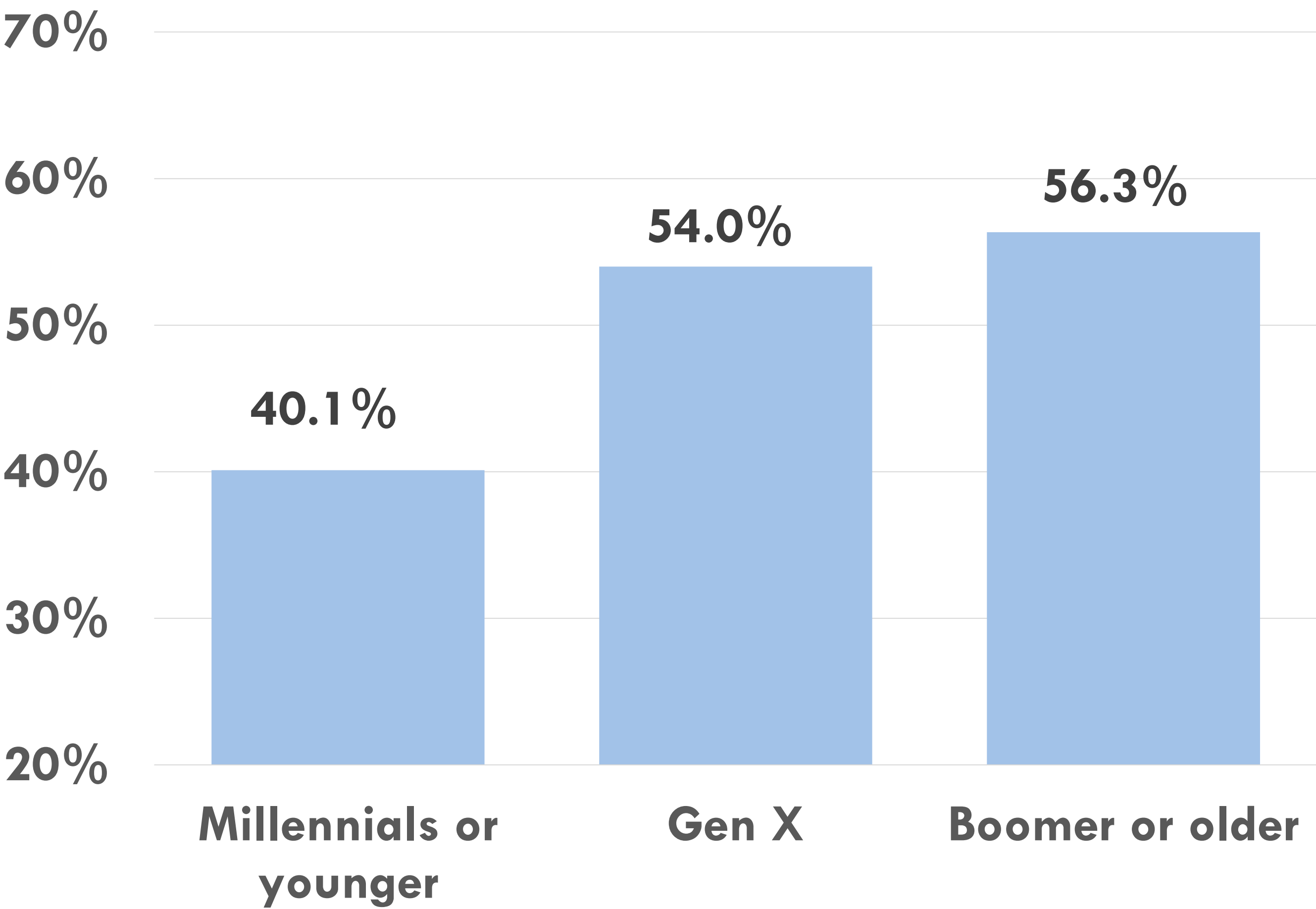
(Base: Waves 41 data. All respondents, 1,201 completed surveys. Data collected December 18-20, 2020)

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.

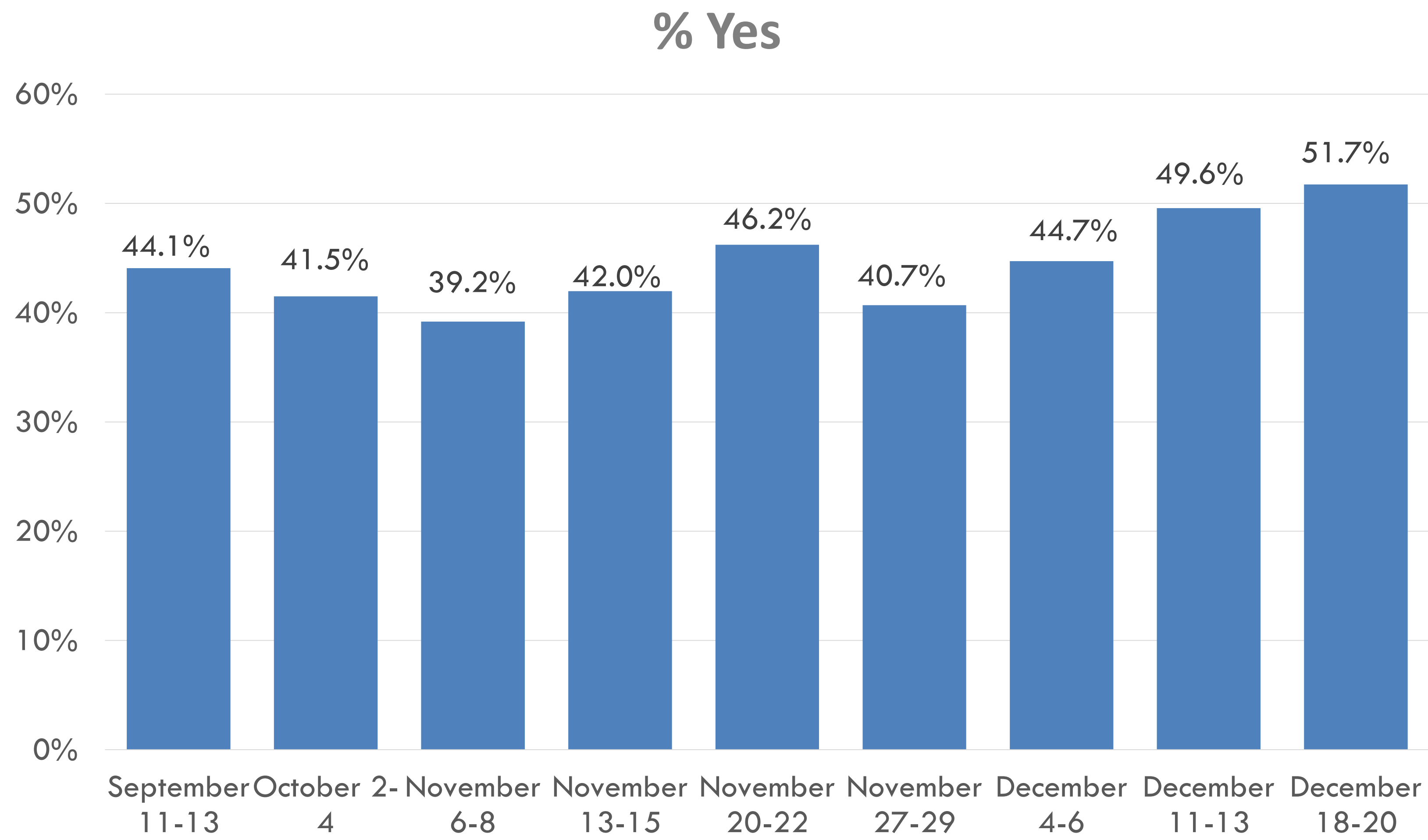
(Base: Waves 41 data. All respondents, 1,201 completed surveys. Data collected December 18-20, 2020)



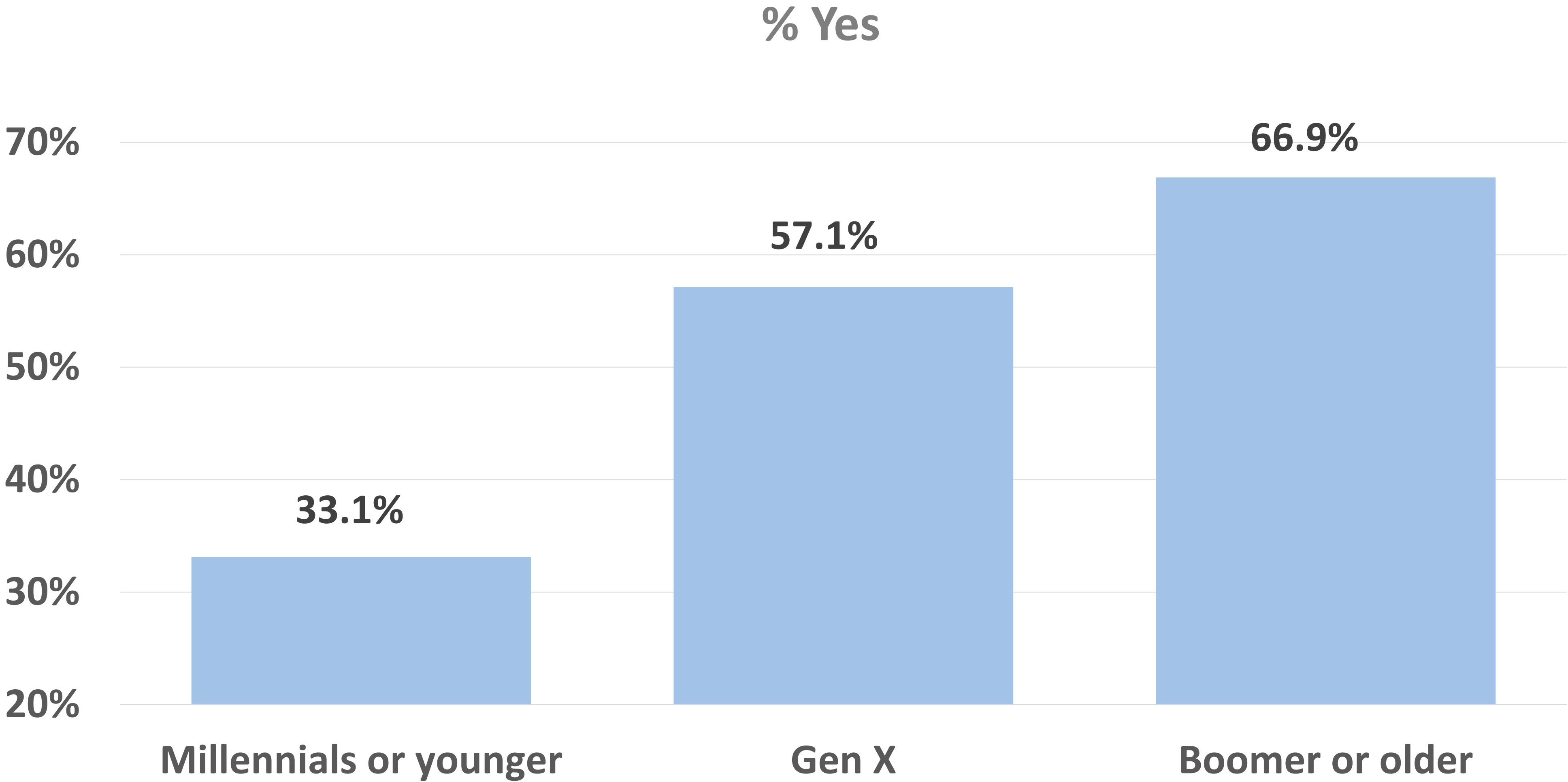
EXPECTATIONS TO TAKE A COVID-19 VACCINE

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



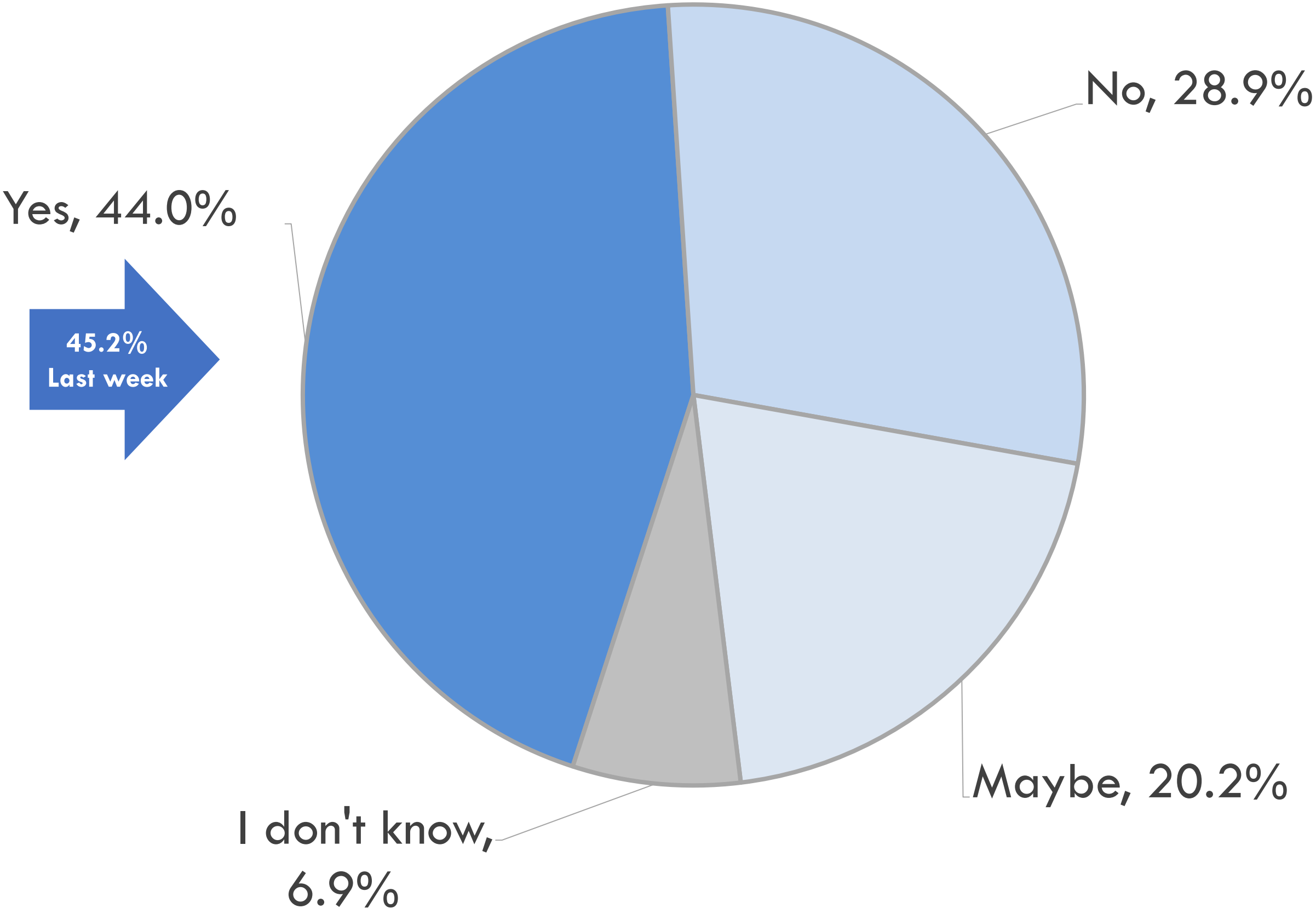
EXPECTATIONS TO TAKE A COVID-19 VACCINE



WILL THEY GET THEIR KIDS VACCINATED?

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

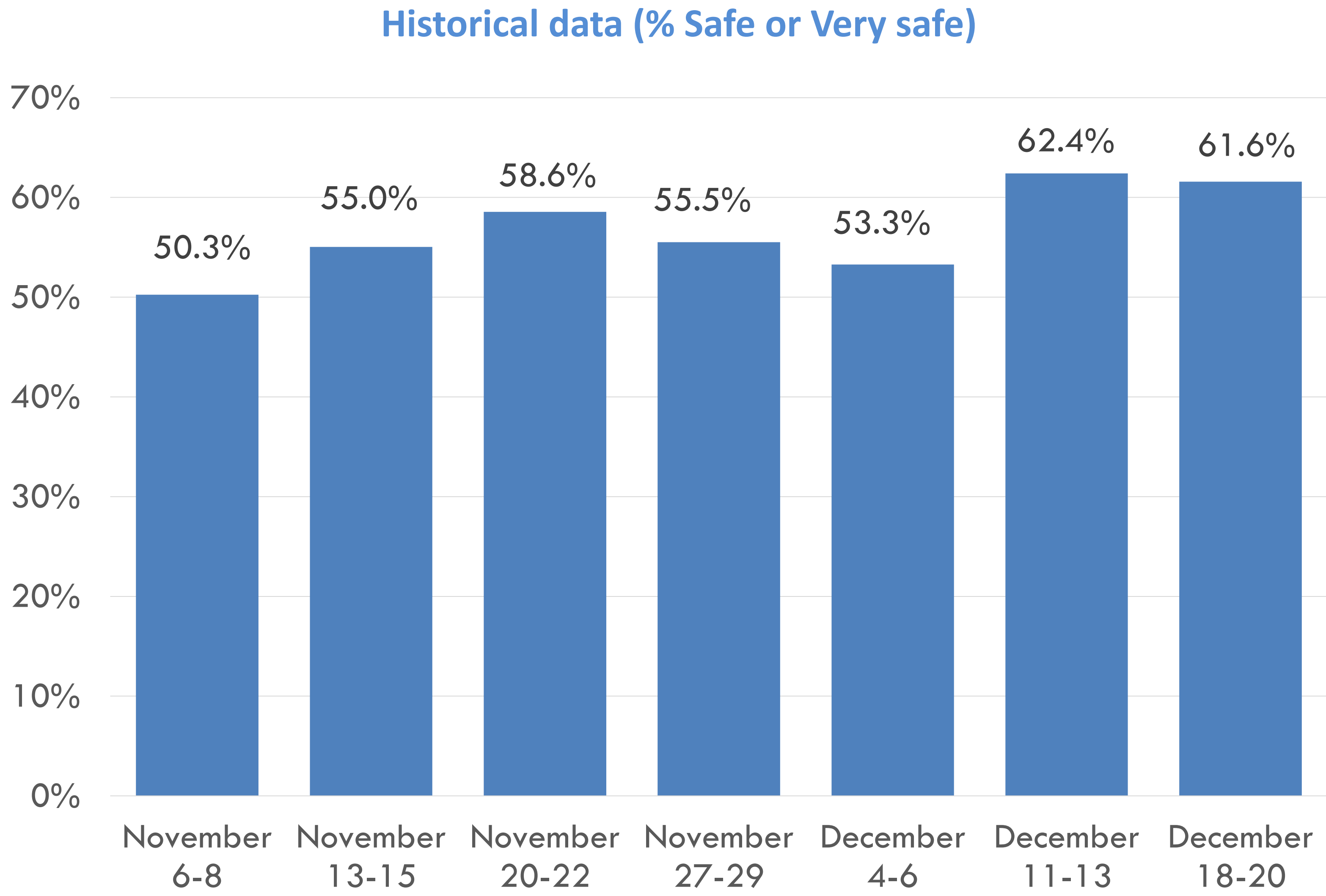
(Base: Wave 41 data. Respondents with school-aged children, 347 completed surveys. Data collected Dec 18-20, 2020)



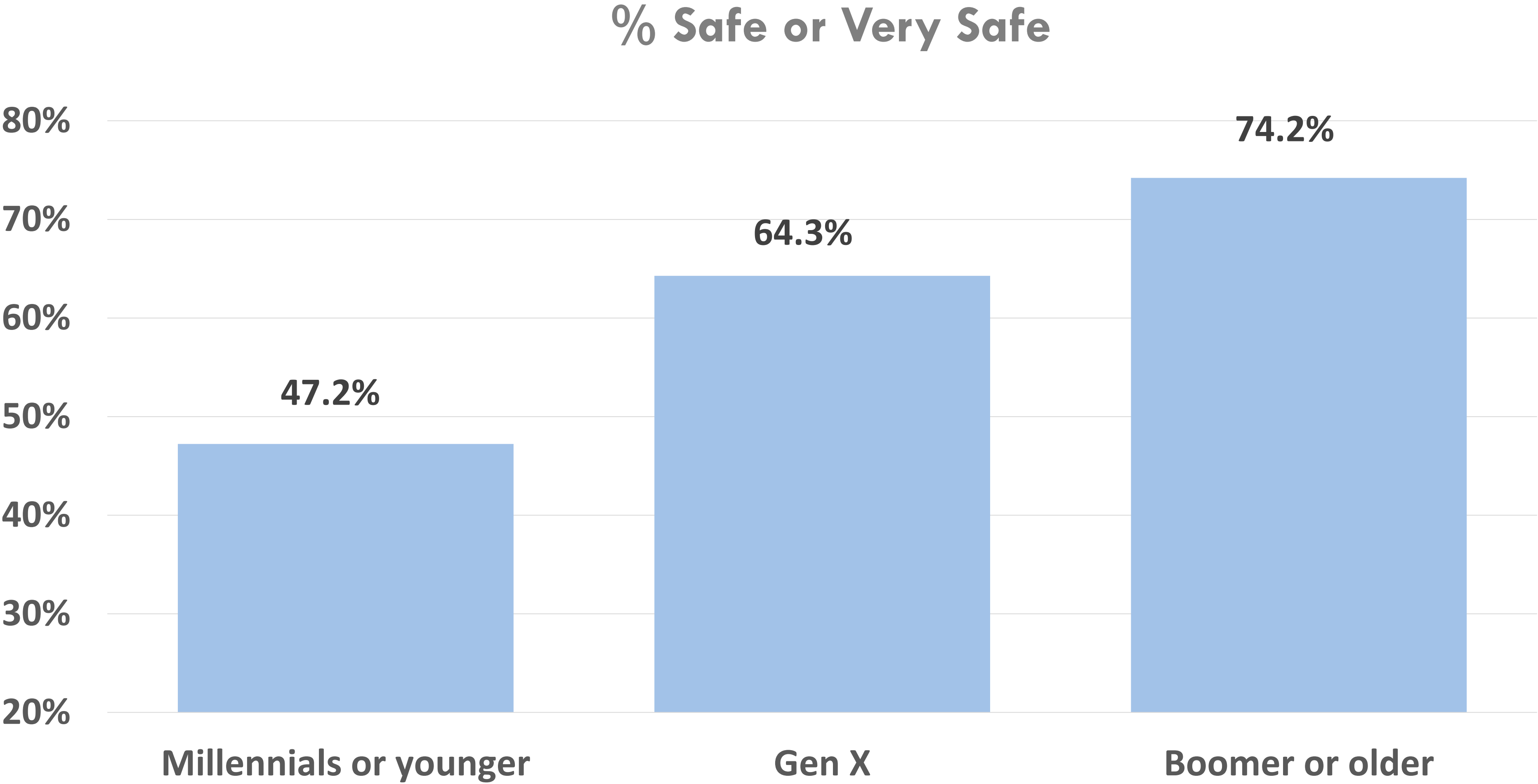
EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



EXPECTED SAFETY OF COVID-19 VACCINES

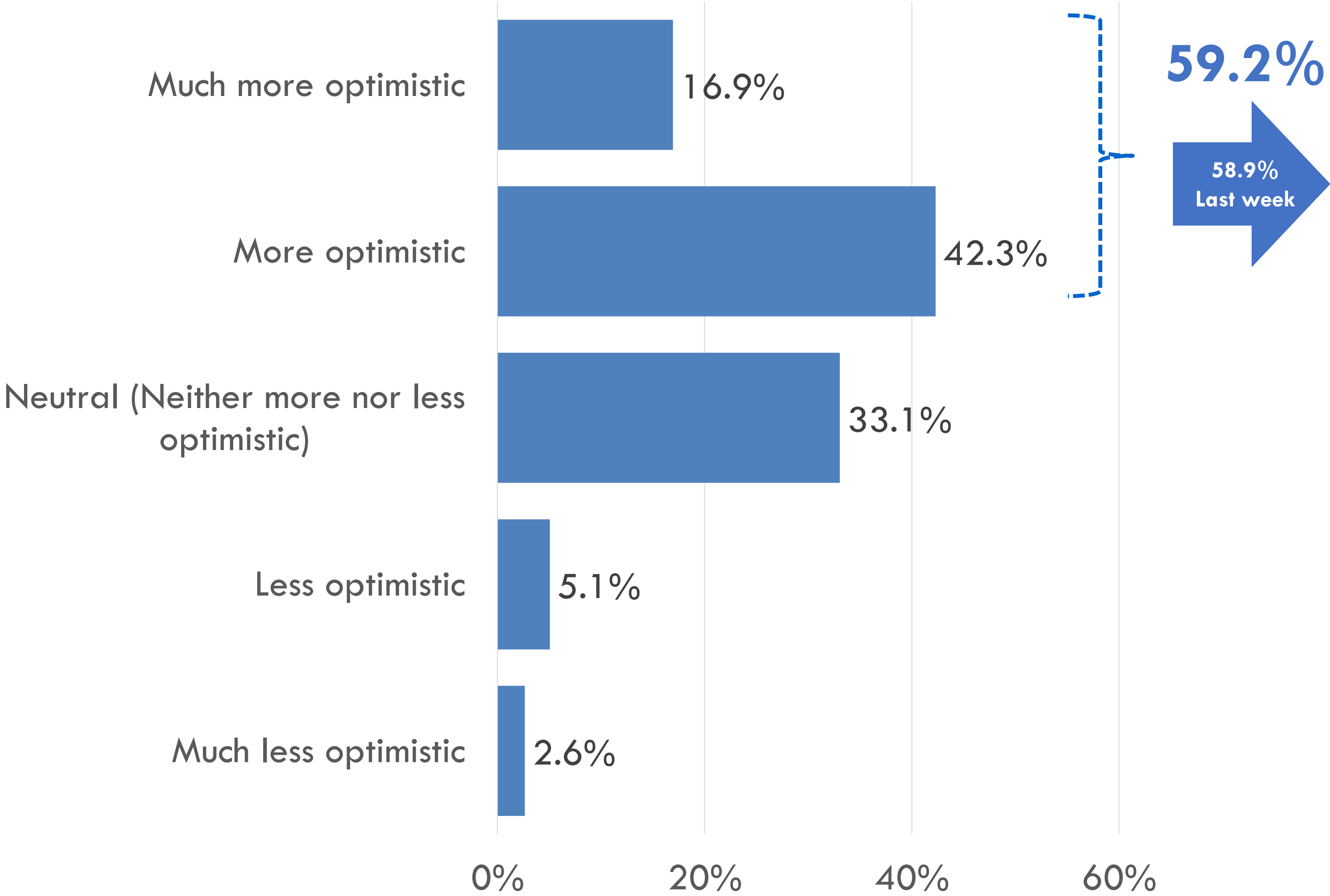


VACCINES AND OPTIMISM FOR A RETURN TO NORMAL

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 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

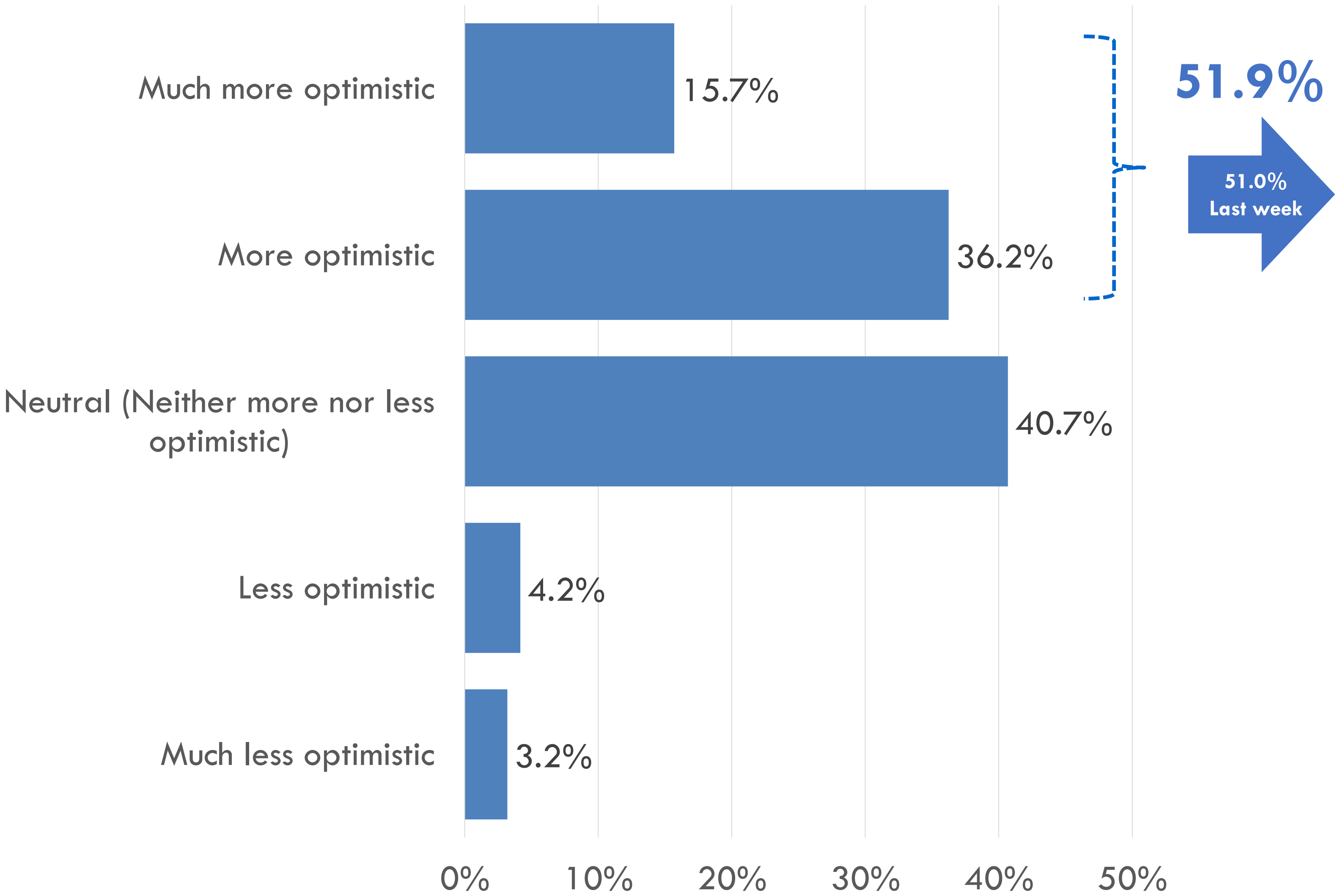


VACCINES AND OPTIMISM FOR TRAVEL RETURNING TO NORMAL

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.

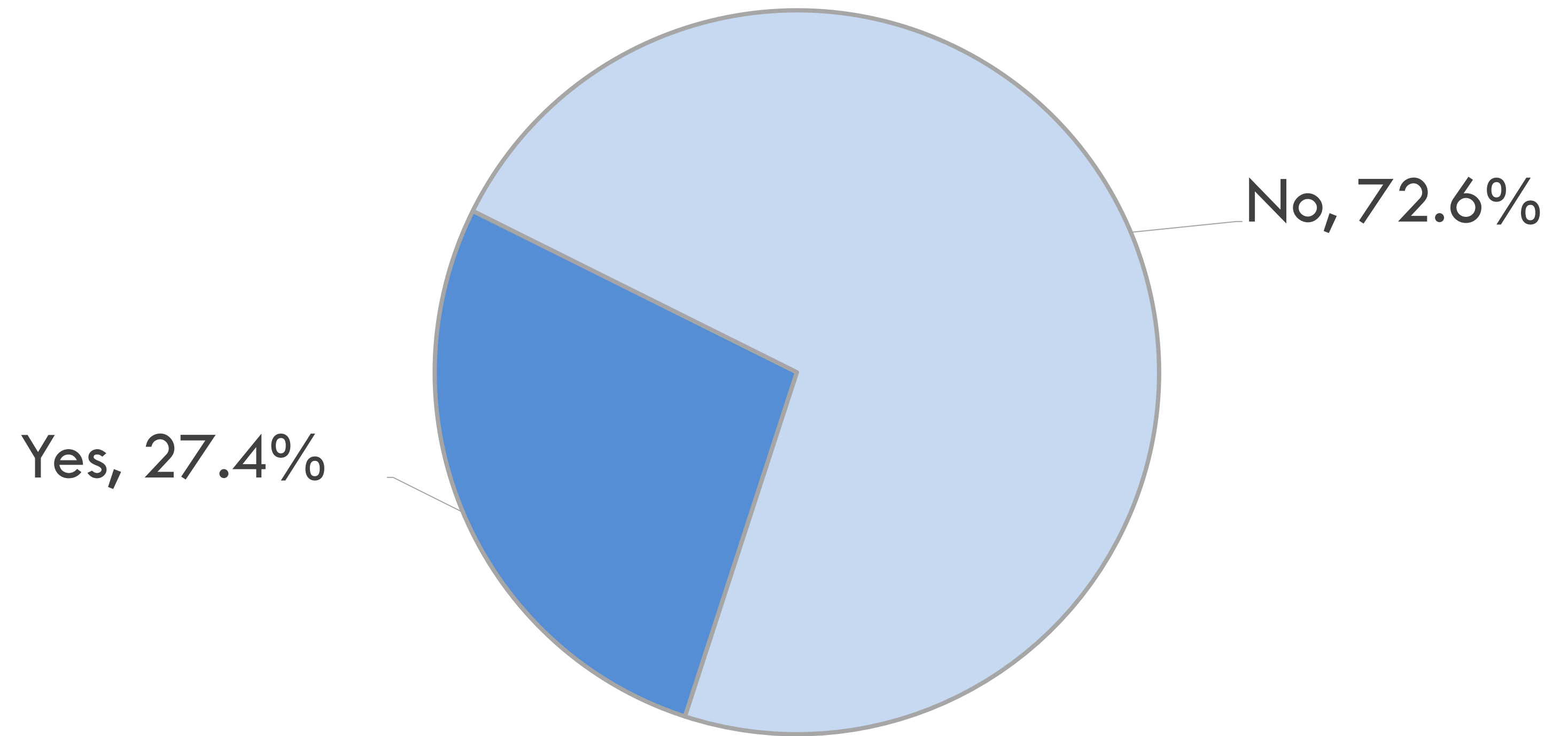
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



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)

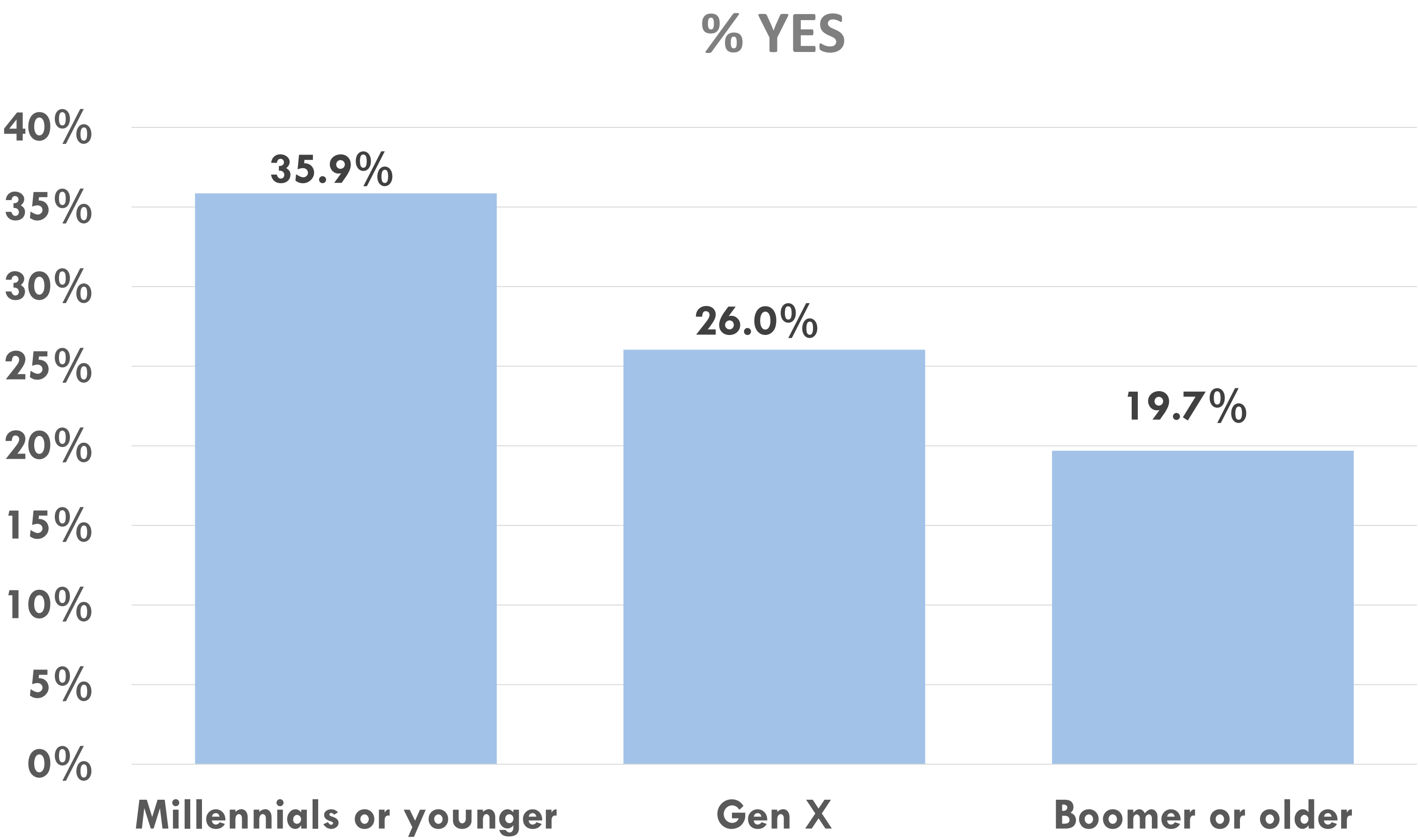
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



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: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



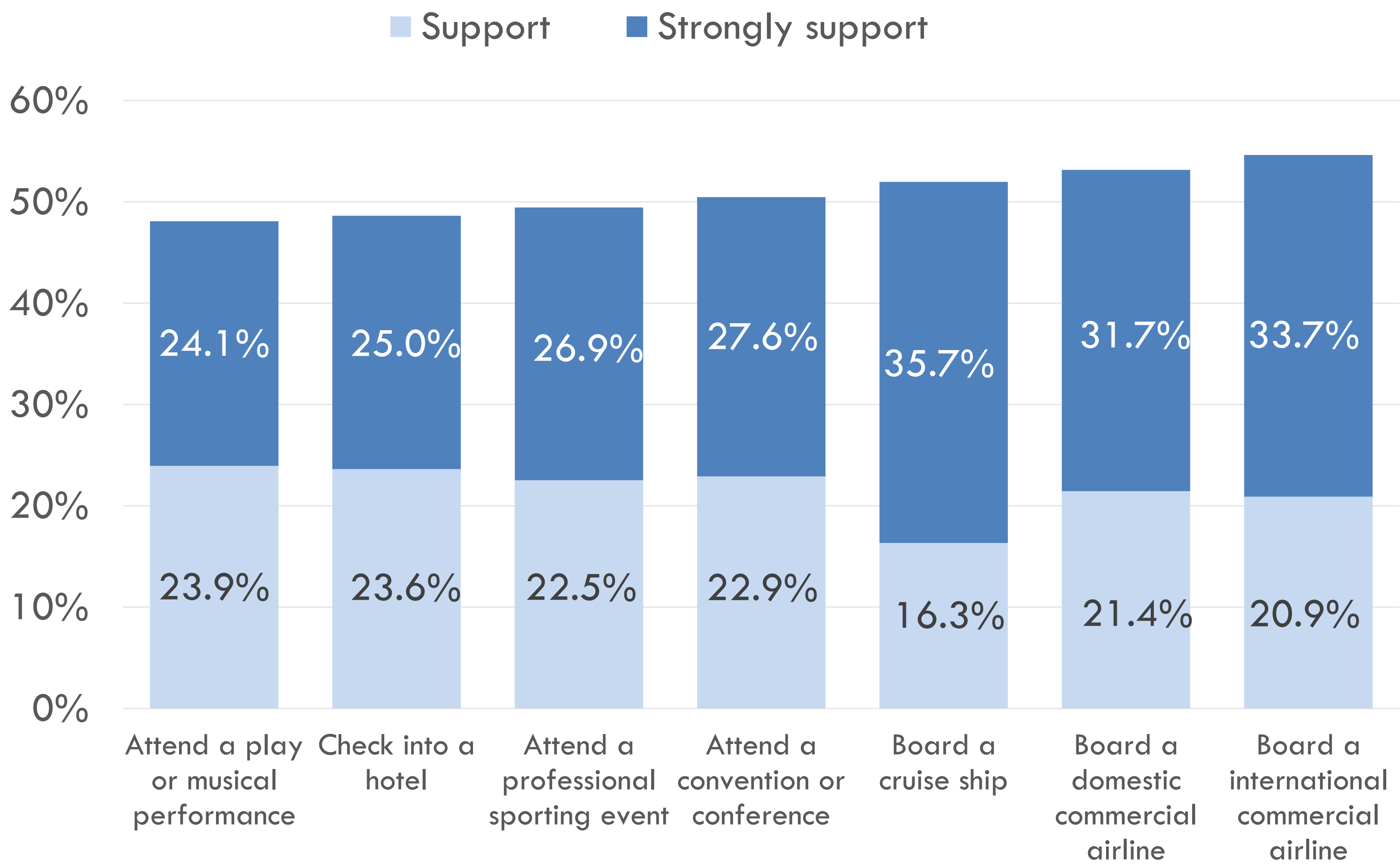
SUPPORT FOR REQUIRING VACCINATIONS IN TRAVEL SITUATIONS

Question: Imagine that proof of having taken a COVID-19 vaccine is **REQUIRED** to do each of the following travel activities.

Use the scale below to indicate how you would feel about this requirement. (Select one for each to complete the sentence)

I would _____ requiring vaccination for this.

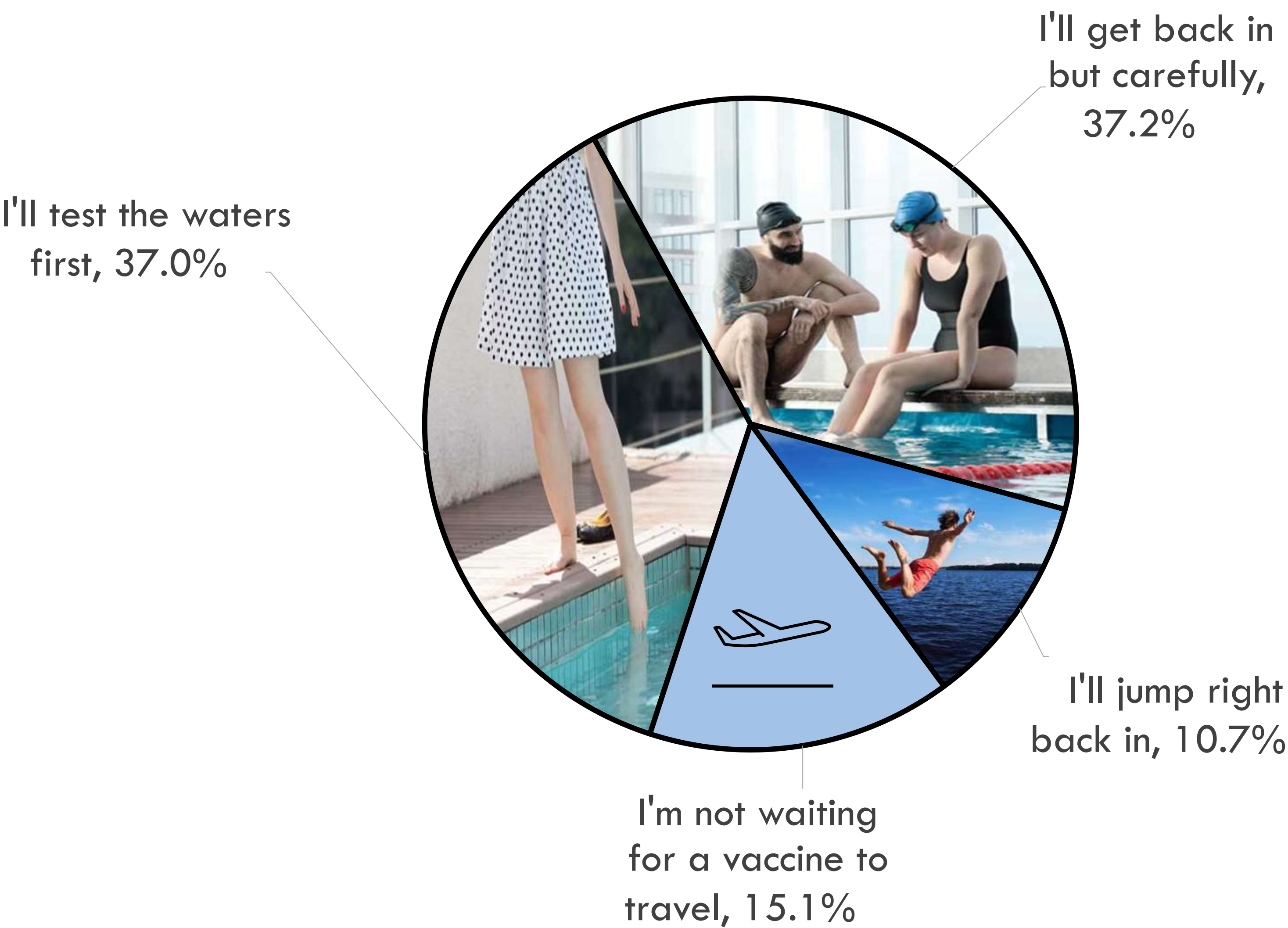
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



GETTING BACK INTO TRAVEL AND THE VACCINE

Question: In the period immediately after vaccines become widely available to the public, how are you going to approach getting back into travel? (Pick the image that best describes you)

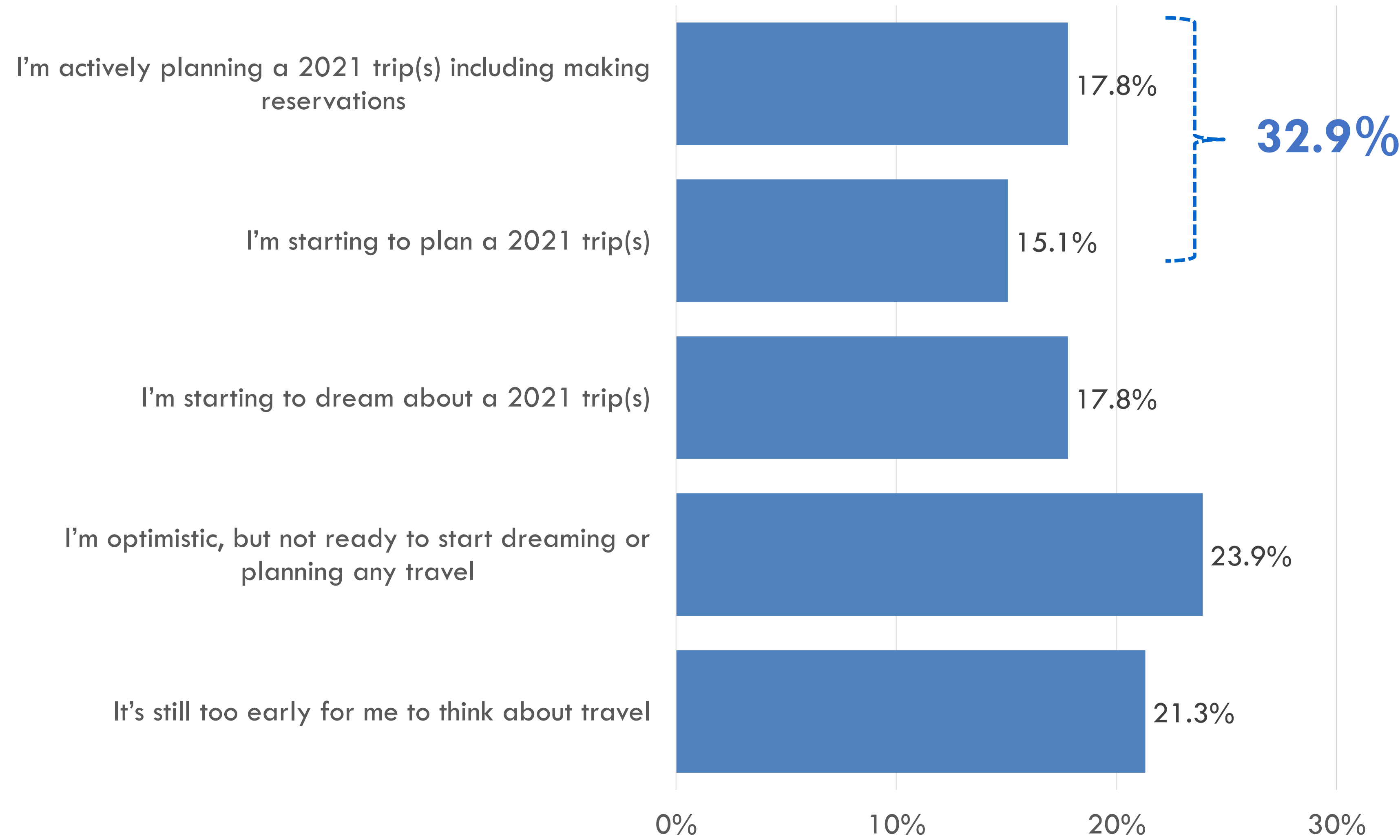
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



DREAMING, TRAVEL PLANNING AND THE COVID-19 VACCINE

Question: With the first COVID-19 vaccine now being distributed in the U.S., which best describes your feelings about travel in 2021?

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)





Key Takeaways

- Half of Americans still agree they are not traveling until vaccines are made widely available, although younger travelers are less likely to feel this way
- Americans—particularly older ones—are showing a growing agreement to take the vaccine
- Americans continue to feel that the vaccine developments make them more optimistic about life returning to normal in the next six months and they can travel safely by then
- When asked specifically if they have begun planning or booking any future travel in anticipation of the COVID-19 vaccine being widely available, 27.4% said yes.
- Right now, there is the strongest support among American travelers for vaccine requirements for boarding flights and cruise ships
- However, the pandemic effects may linger for some time as Americans still express some travel hesitation, even with the vaccines
- But with the vaccine distribution timeline increasingly clear, about a third of Americans are now in the starting or actively planning a trip stage for 2021

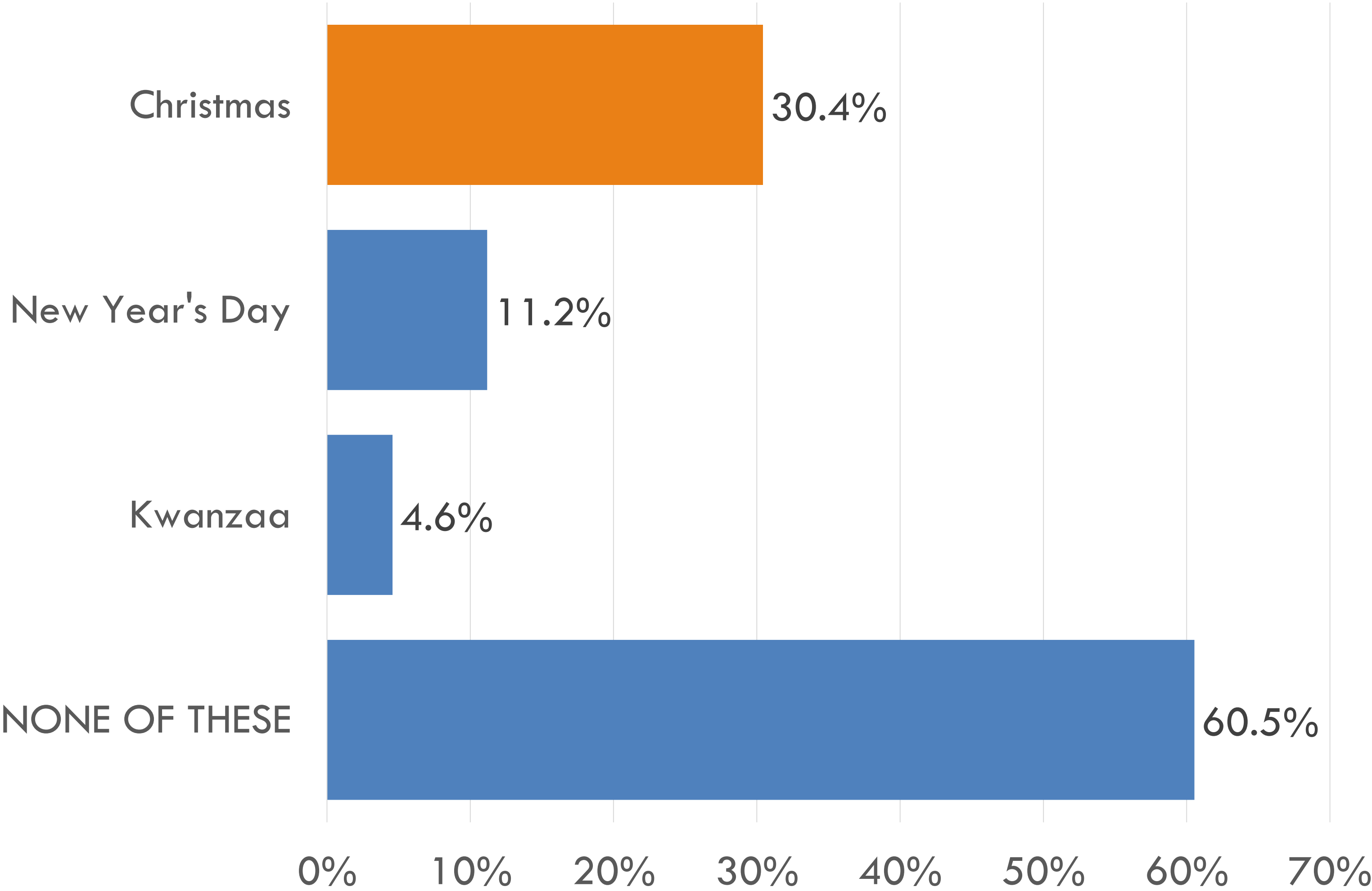
HOLIDAY TRAVEL



HOLIDAY TRAVEL LAST YEAR

Question: Did you travel (50 miles or more from your home) to celebrate/participate in any of the following LAST YEAR (2019)?

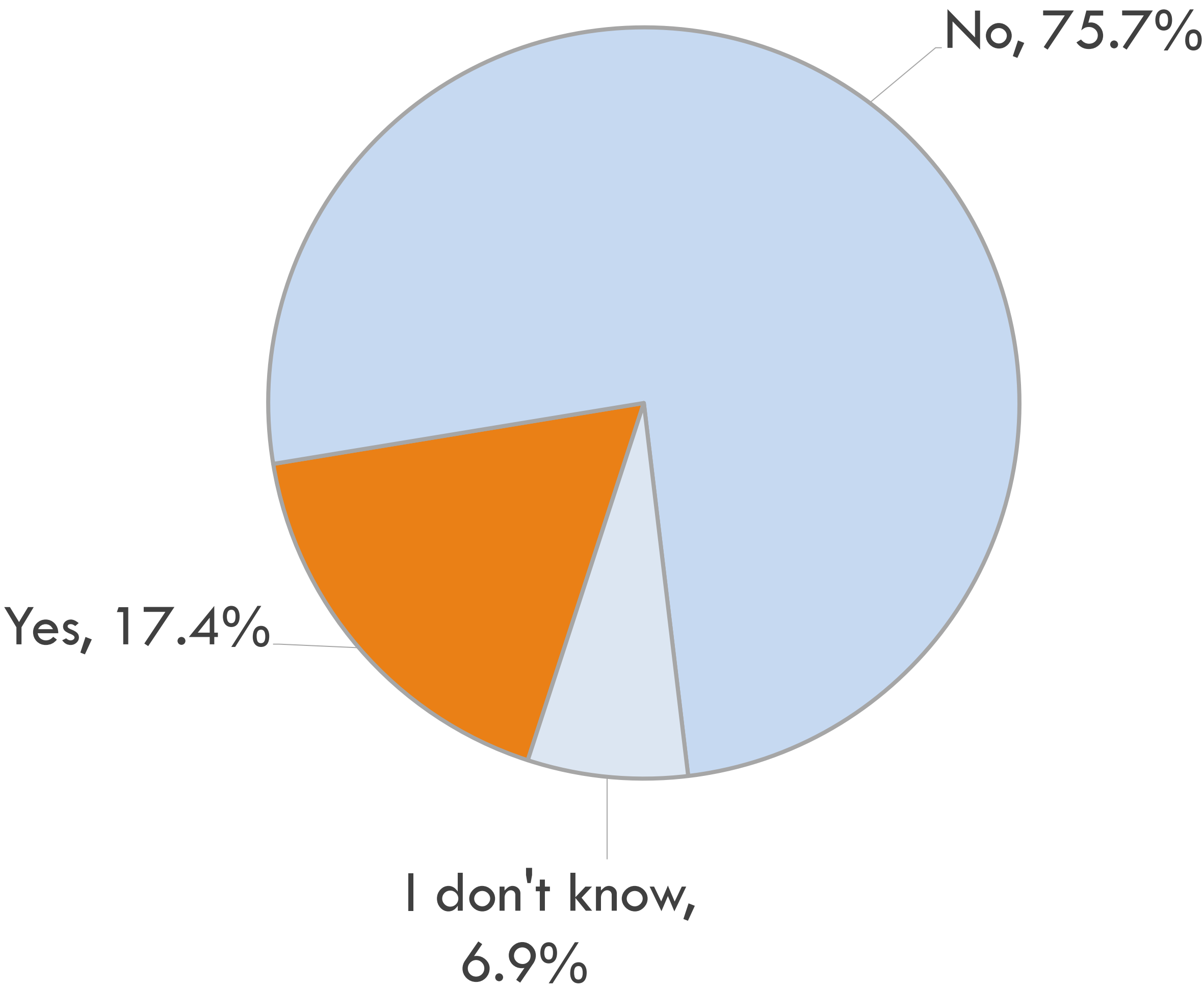
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



TRAVEL FOR CHRISTMAS HOLIDAY THIS YEAR

Question: Will you be traveling over the Christmas holiday (50 miles or more from your home) this year?

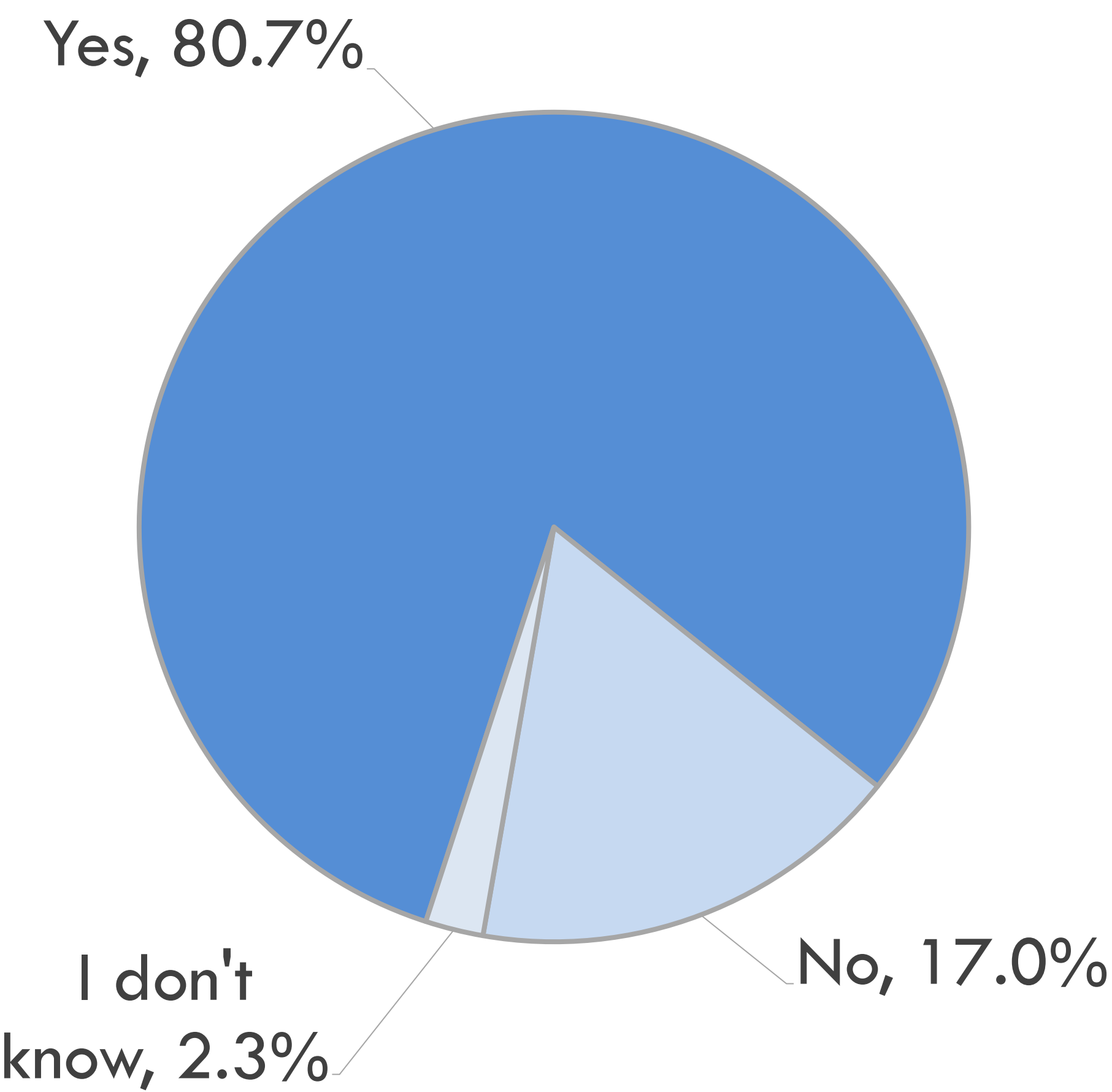
(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



PRIMARY REASON FOR TRAVEL: FAMILY

Question: Over the Christmas holiday, will you travel primarily to spend time with friends and family in their homes?

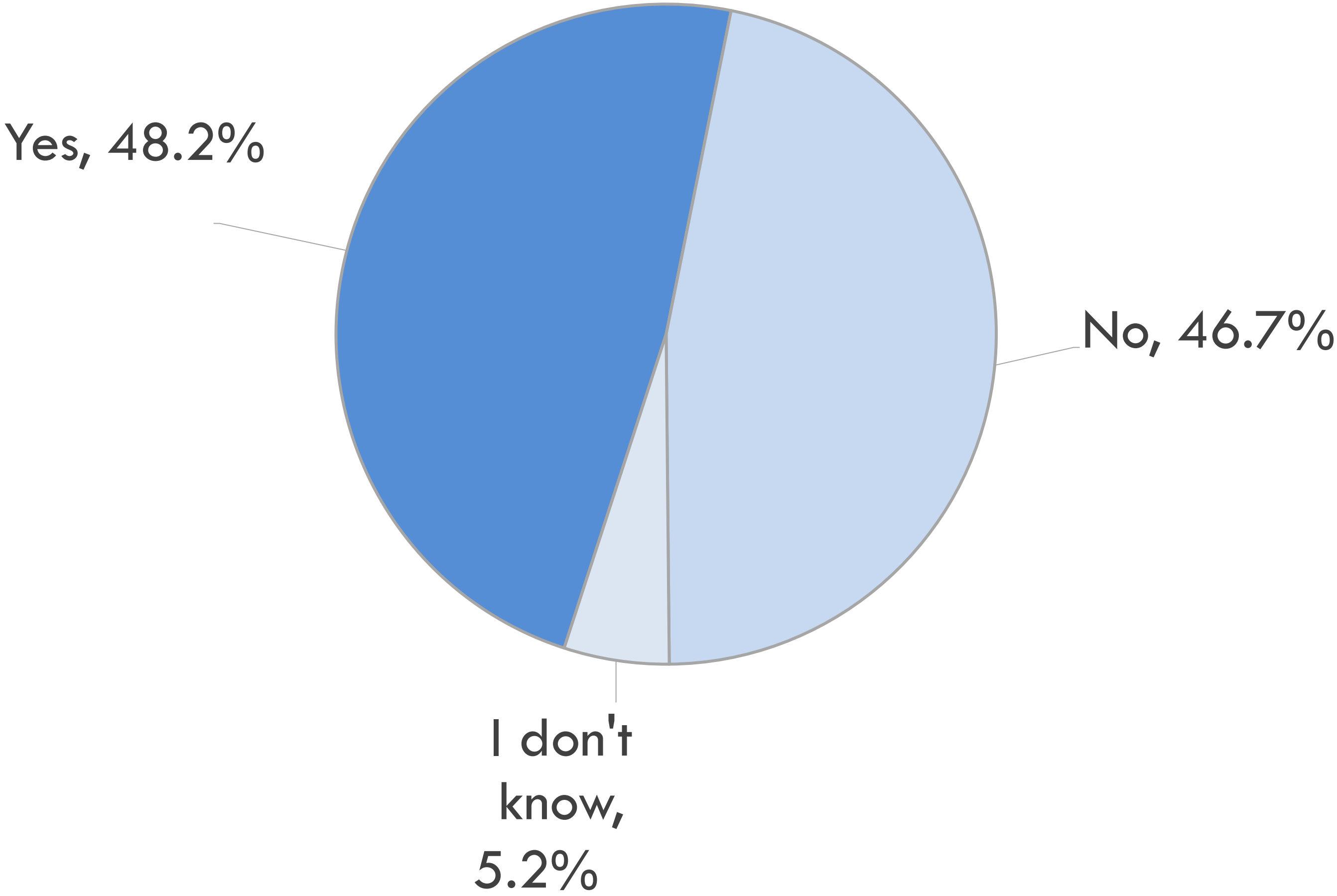
(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)



PRIMARY REASON FOR TRAVEL: VACATION OR WEEKEND GETAWAY

Question: Over the Christmas holiday, will you travel primarily to take a vacation or weekend getaway?

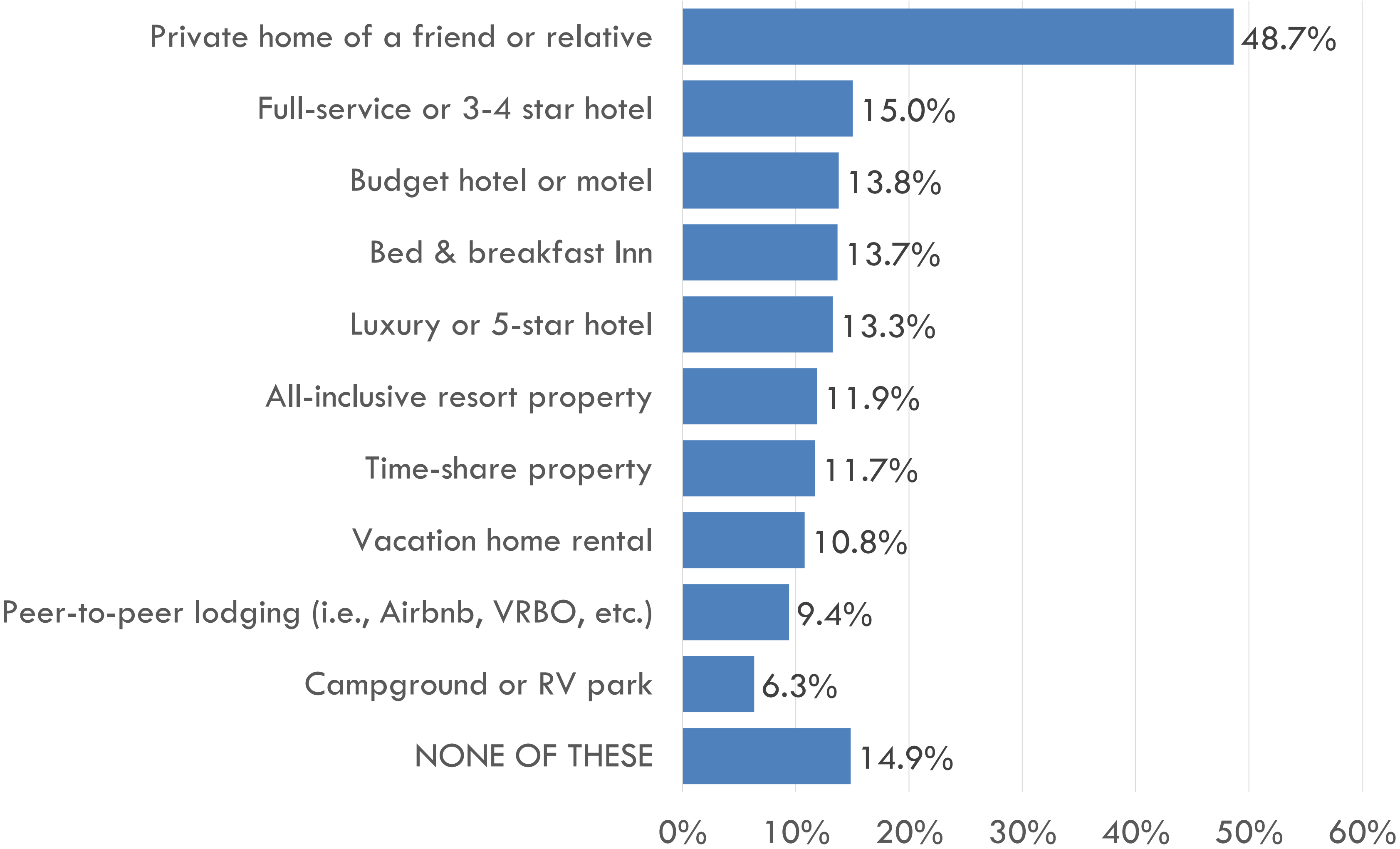
(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)



PLACE OF STAY OF CHRISTMAS TRIP

Question: In which of the following will you stay overnight in while traveling on your Christmas holiday? (Select all that apply)

(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)

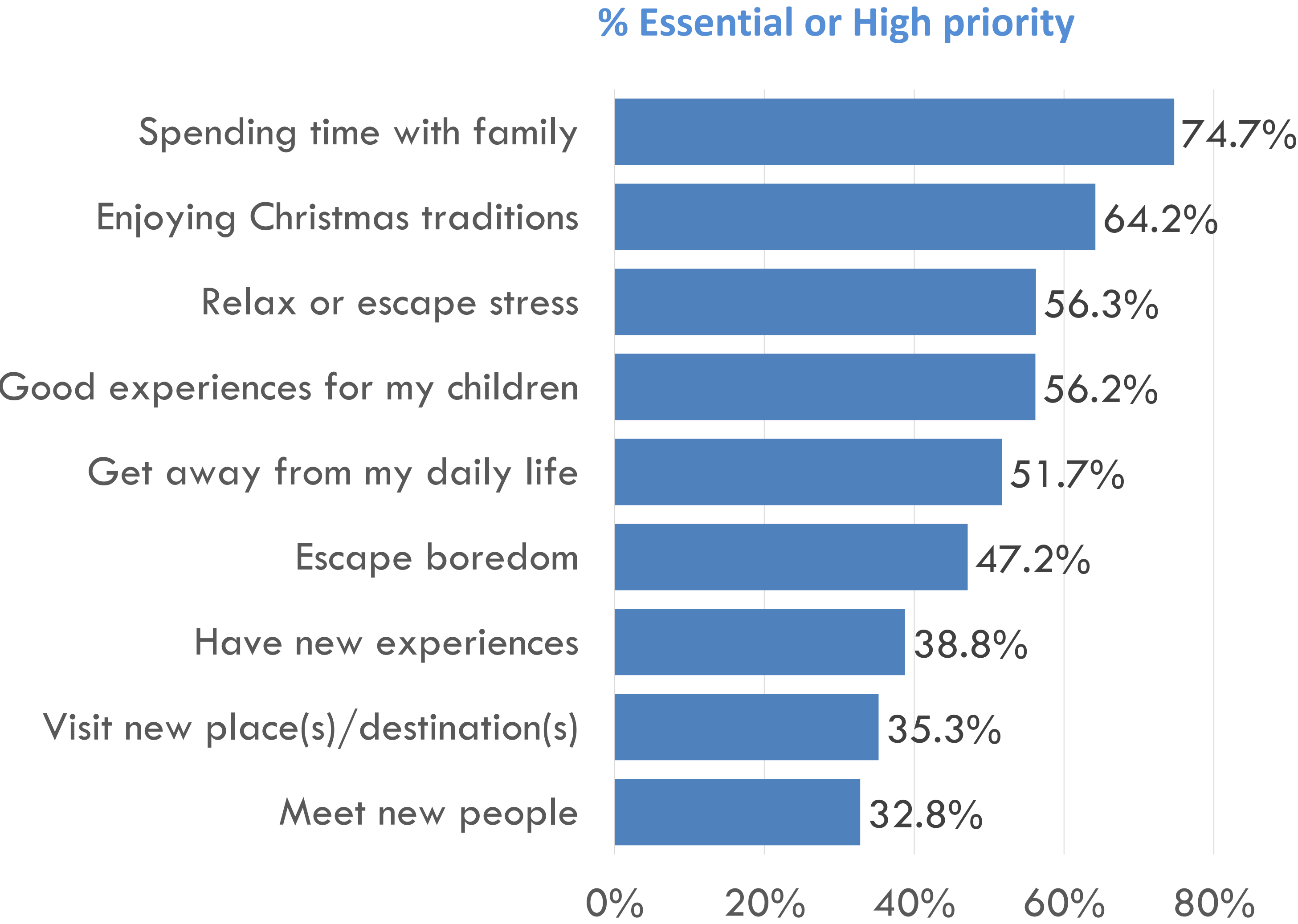


CHRISTMAS TRAVEL PRIORITIES

Question: Thinking about your Christmas holiday travel this year, what experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

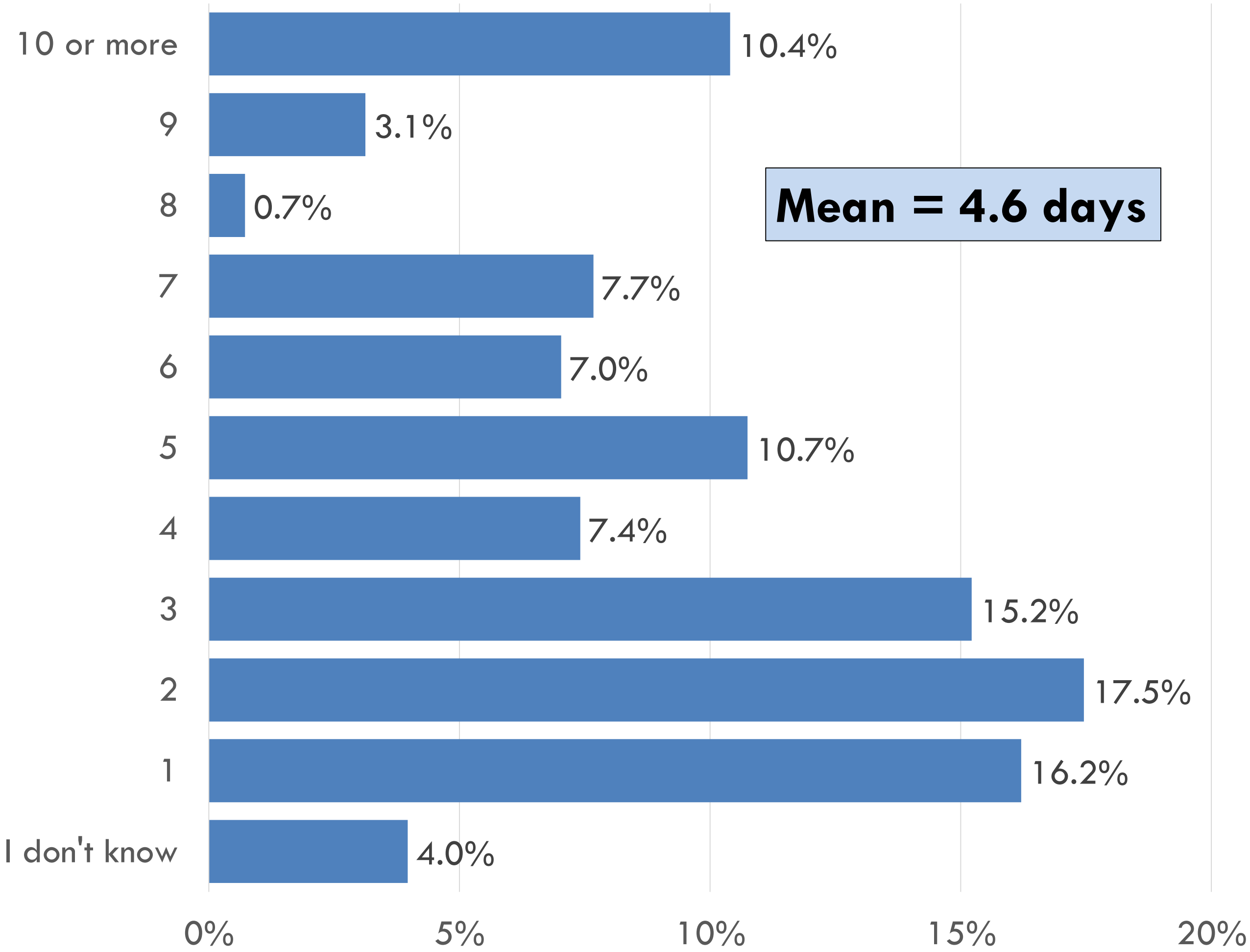
(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)



DAYS AWAY FROM HOME: CHRISTMAS TRAVEL

Question: How many days will you spend away from home during your Christmas holiday travels? (Select one)

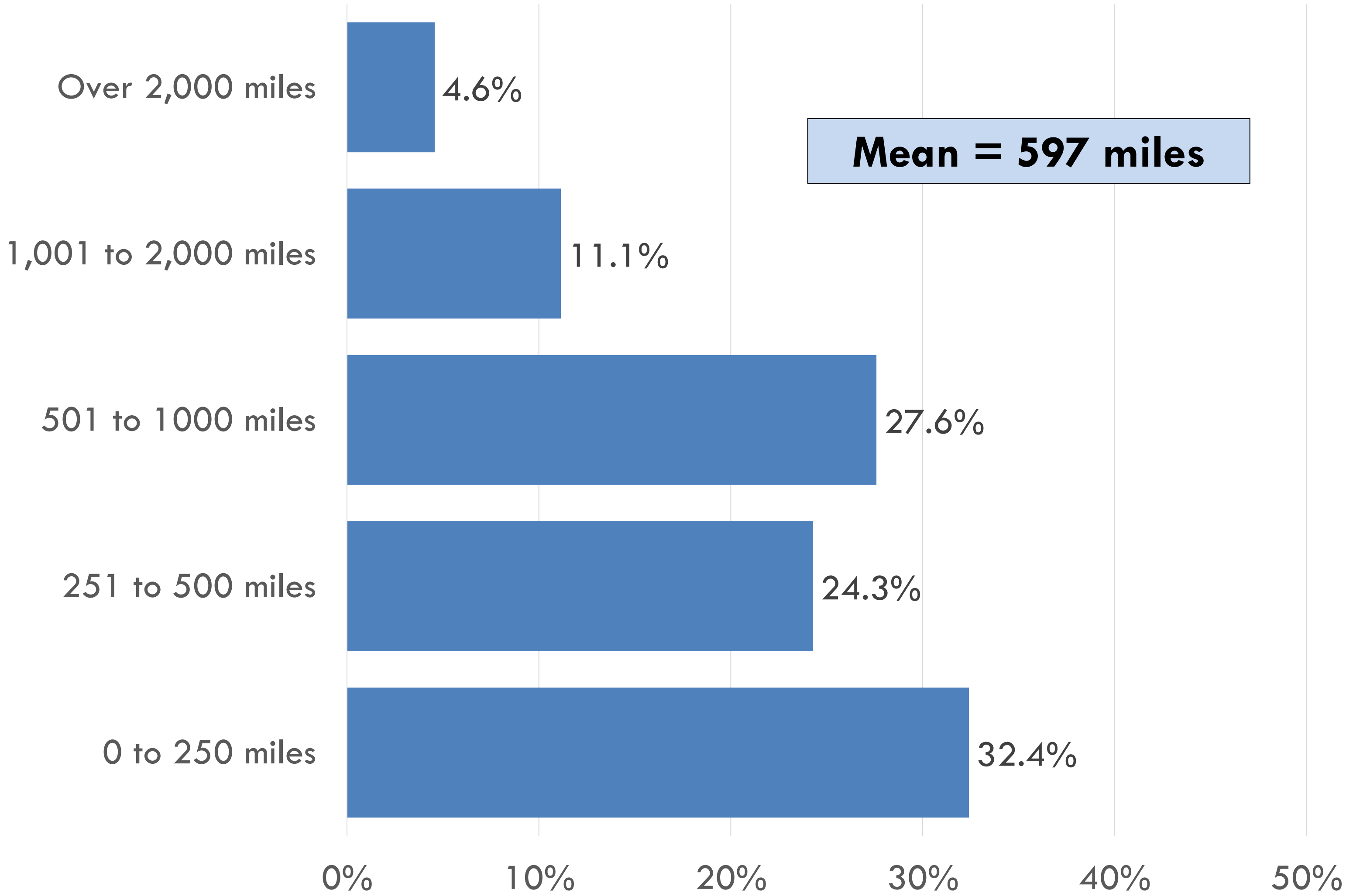
(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 182 completed surveys. Data collected Dec 18-20, 2020)



DISTANCE FROM HOME: CHRISTMAS TRAVEL

Question: While traveling over the Christmas holiday, how far away from home will you go? (Select one)

(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)

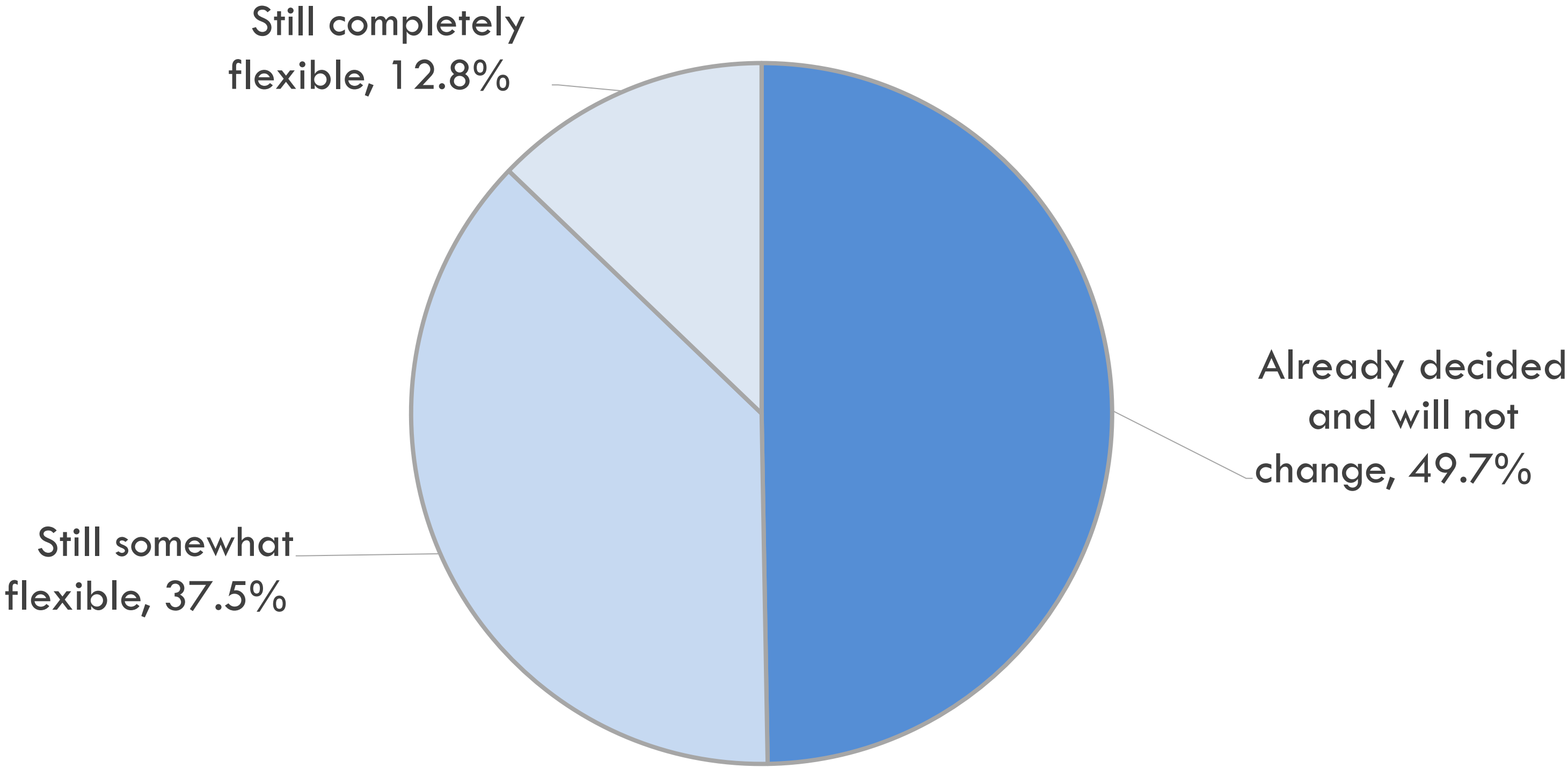


FLEXIBILITY OF CHRISTMAS TRAVEL DESTINATIONS

Question: Are the destinations you will visit on your Christmas holiday already decided or are they still flexible? (Select to complete the sentence)

The destinations I will visit are _____.

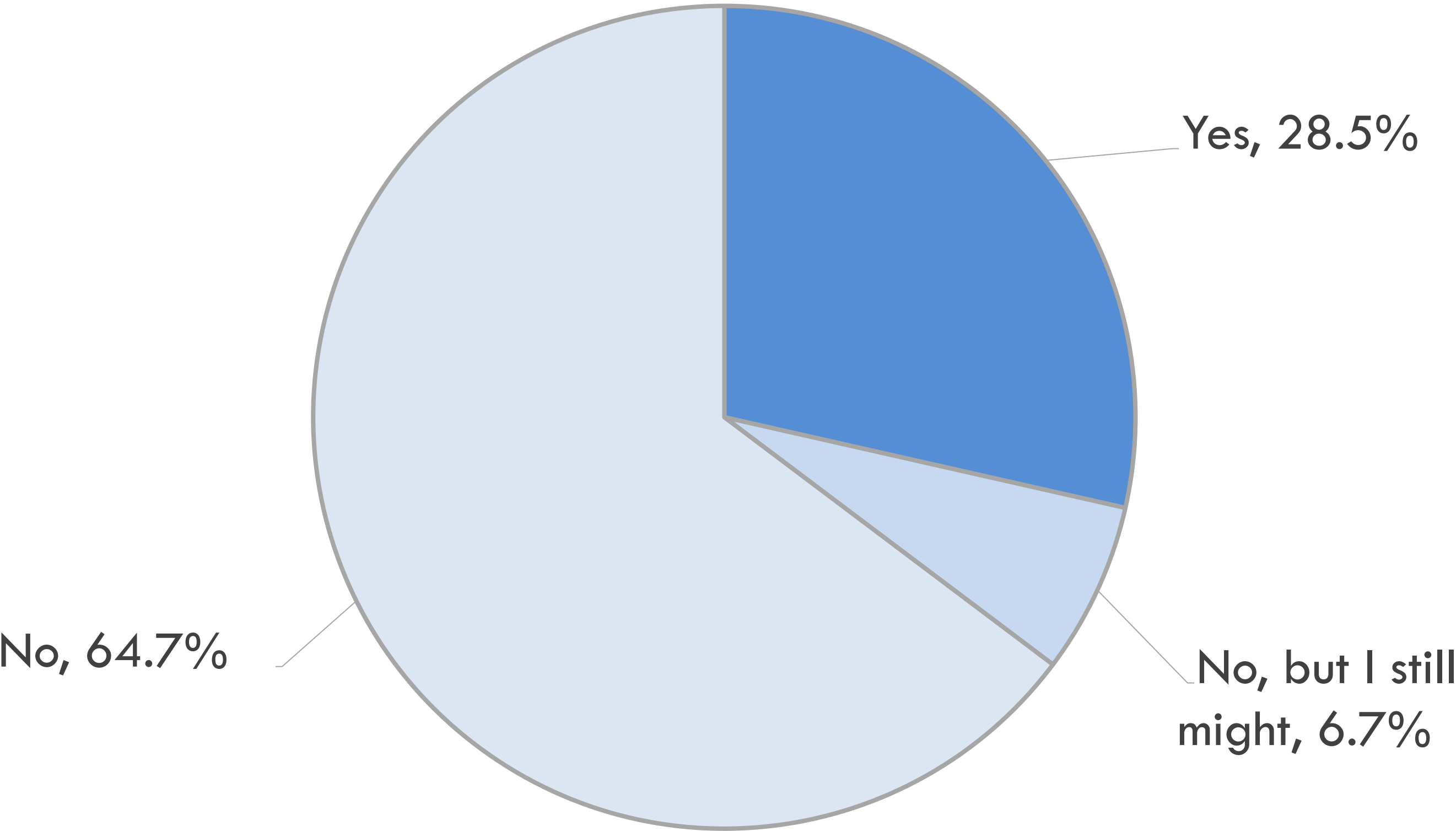
(Base: Wave 41 data. Respondents traveling over the Christmas holiday, 192 completed surveys. Data collected Dec 18-20, 2020)



CANCELLATION OF CHRISTMAS TRIPS DUE TO PANDEMIC

Question: Have you
CANCELLED a Christmas trip
this year due to the COVID-19
situation? (Select one)

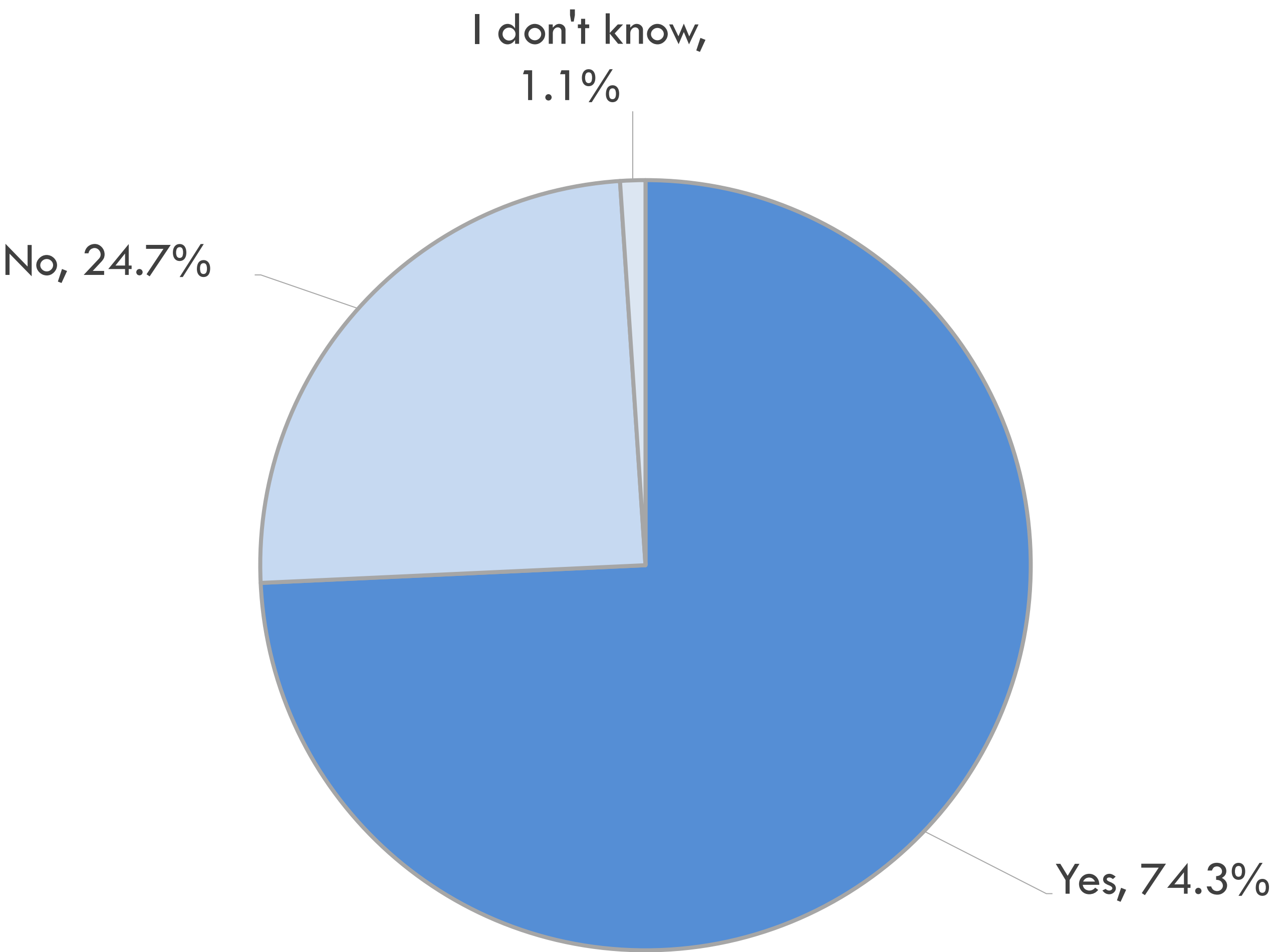
(Base: Wave 41 data. All respondents,
1,201 completed surveys. Data collected
Dec 18-20, 2020)



CANCELLATION OF CHRISTMAS TRIPS DUE TO RECENT SURGE

Question: Did you cancel this Christmas trip specifically due to the RECENT SURGE in COVID-19 cases? (Select one)

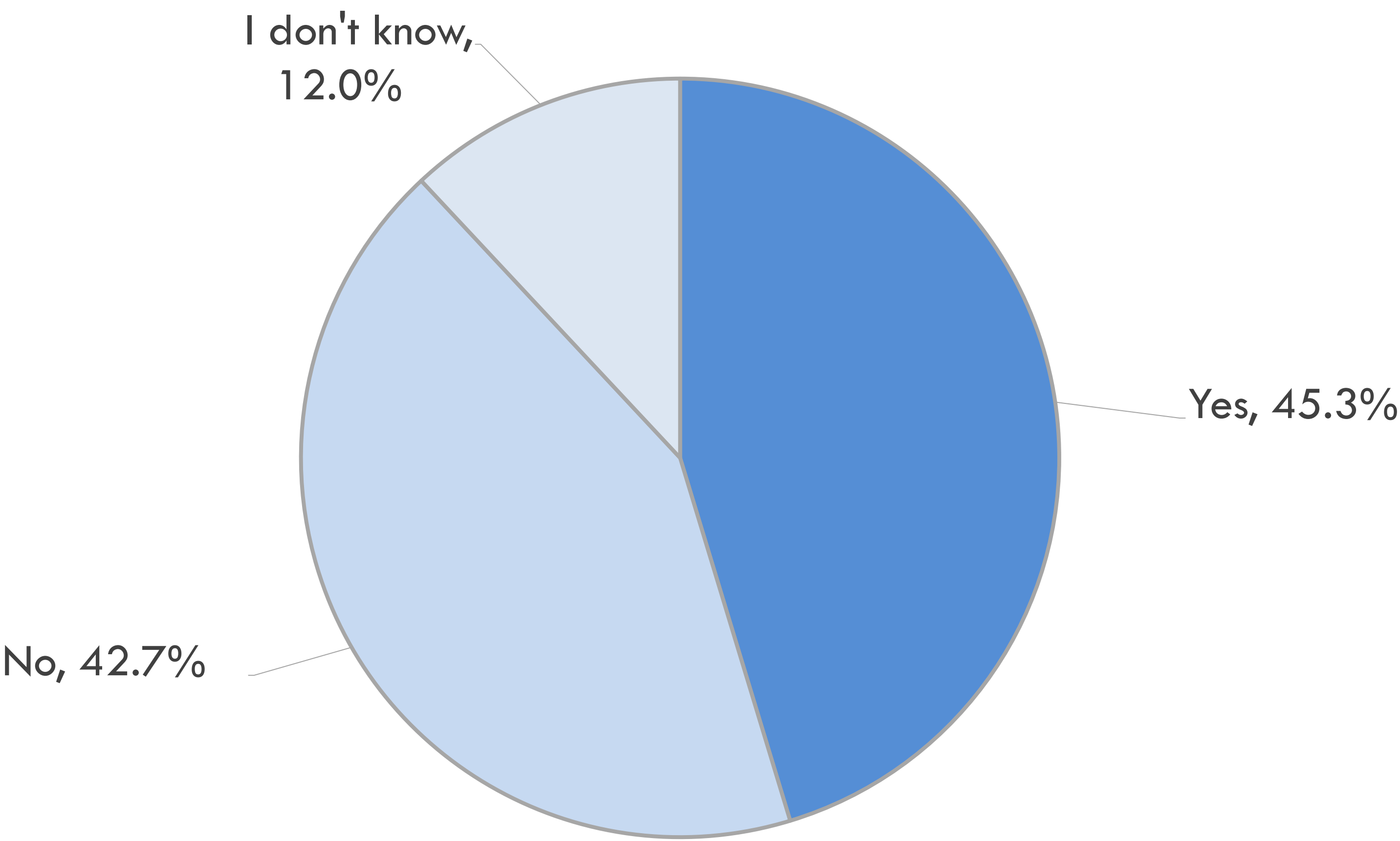
(Base: Wave 41 data. Respondents cancelling a Christmas trip, 348 completed surveys. Data collected Dec 18-20, 2020)



FRIENDS OR FAMILY SKIPPING TRAVEL THIS YEAR

Question: Do you have any friends or family members who would normally travel over Christmas, but will not this year due to the Coronavirus situation?

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

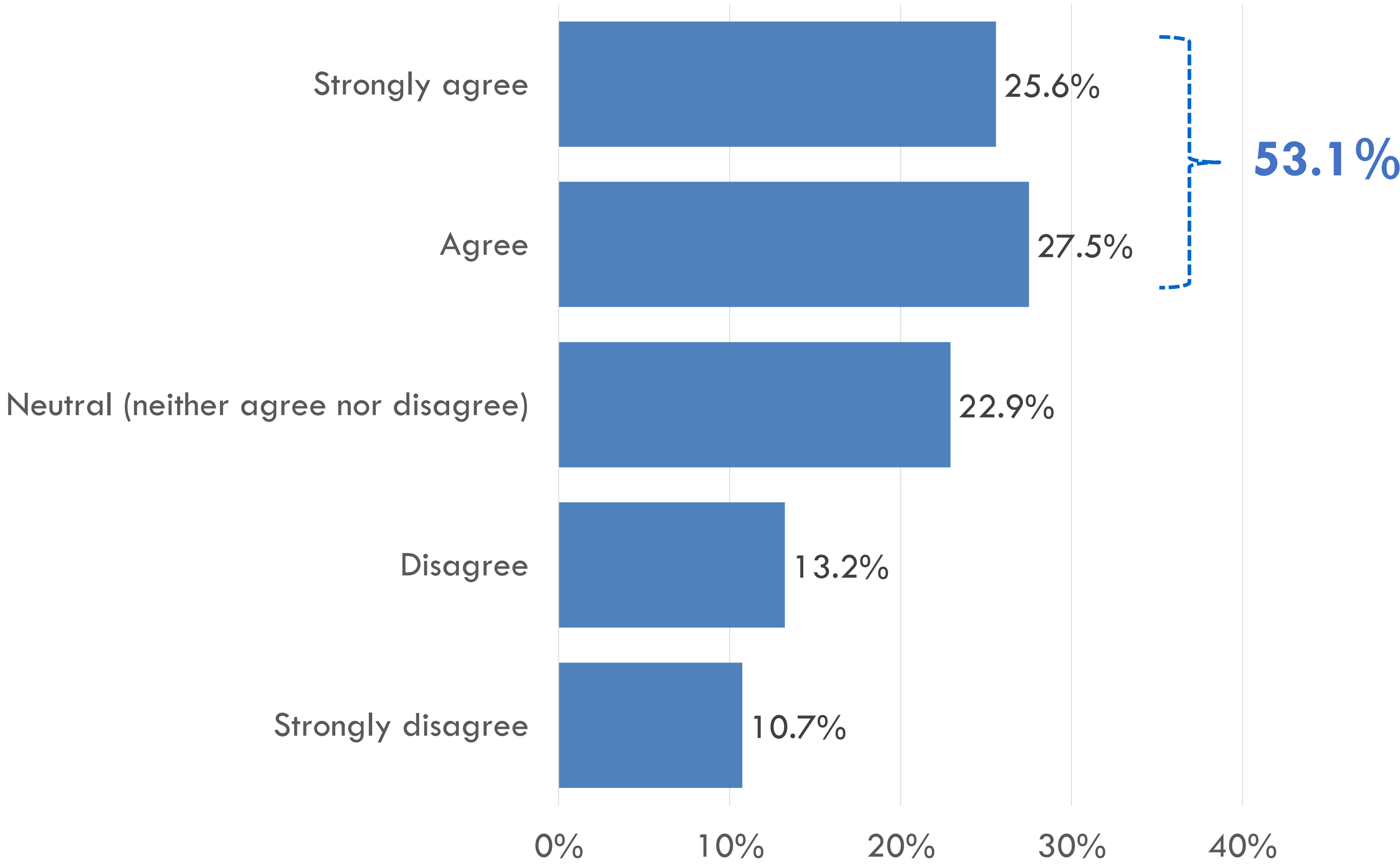


CONCERNS ABOUT SPENDING TIME WITH FAMILY

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

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

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)



EXCITEMENT ABOUT CHRISTMAS THIS YEAR

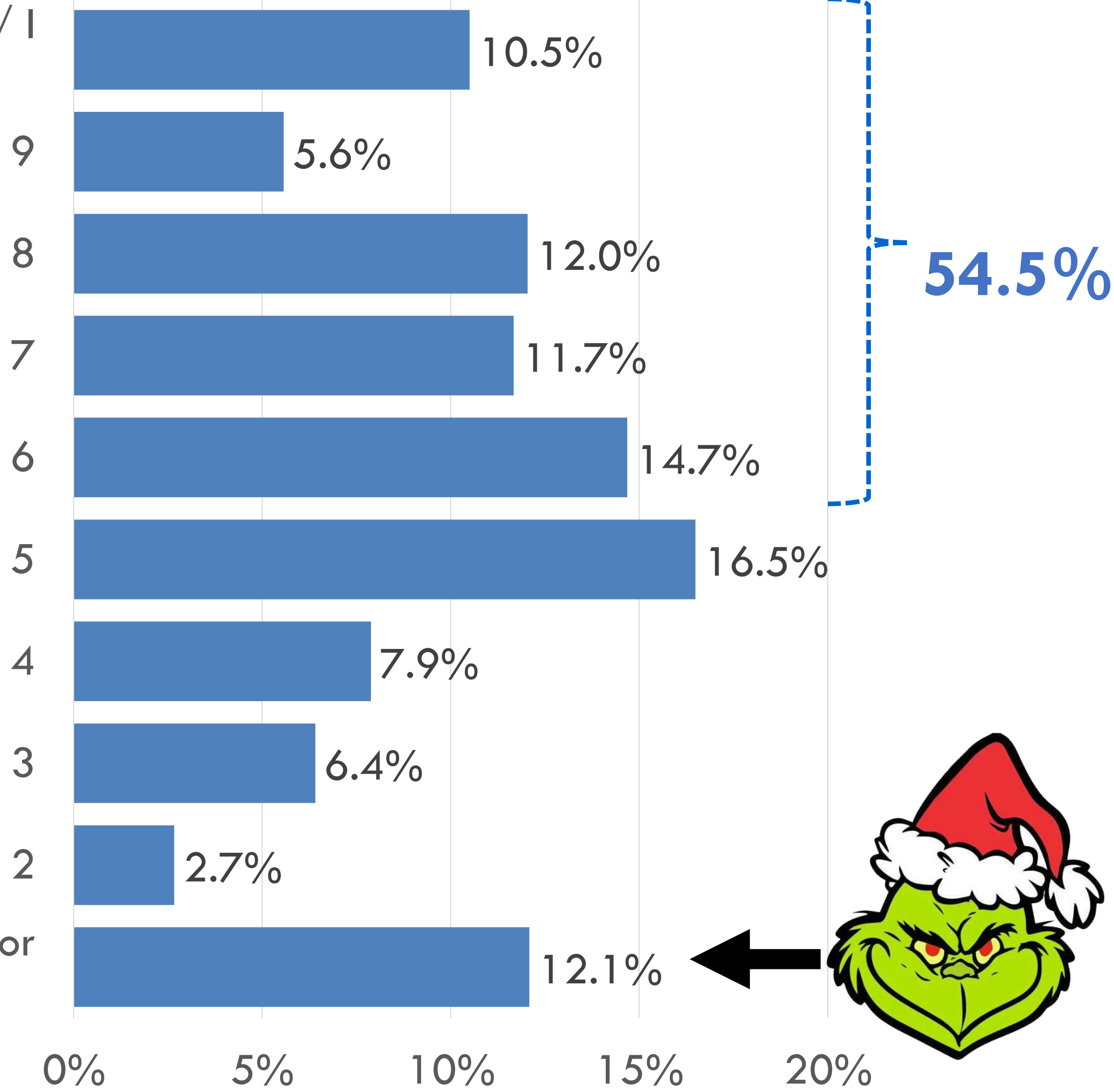
Question: How excited are you for the Christmas holiday this year?

(Use the 10-point scale below to tell us how you feel)

(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected Dec 18-20, 2020)

10 - I am super excited for Christmas / I can't wait

1 - I'm NOT AT ALL excited for Christmas / I'm dreading it





Who is
Grinchier?

Who is Grinchier?

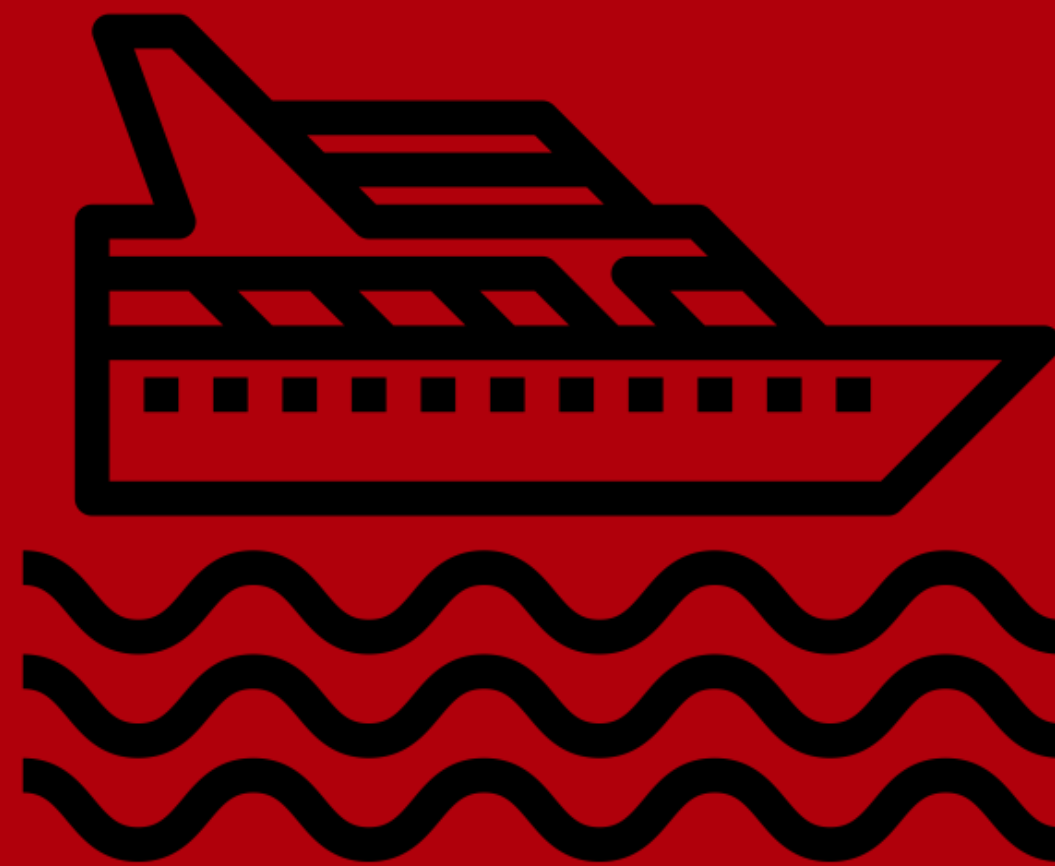


Millennials or Boomers?

6.8%

16.3%

Who is Grinchier?



Cruisers or Non-Cruisers

1.0%

7.4%

Who is Grinchier?



Country Folks or City Slickers

8.1%

4.7%

Who is Grinchier?



Southerners or Westerners

9.9%



15.1%

Who is Grinchier?



Travel Avoiders* or Traveling Now

1.2%



11.6%

*** Plan to avoid all travel until the Coronavirus situation blows over**

Key Takeaways

- This year's holiday travelers are all about spending time with family and friends. They'll be traveling over the Christmas holiday primarily to be with loved ones, spending time with family is their top priority during their holiday travels and they're likely to stay overnight in the private home of family or friends.
- Nevertheless, there's an opportunity to influence the destination decision of holiday travelers, as half reported that the destinations they will visit are either somewhat or completely flexible.
- The current coronavirus situation is impacting Christmas travel, with 30 percent of Americans who have cancelled a Christmas trip and 45 percent who say they have friends and family who typically take a trip over the holiday but will not do so this year because of coronavirus.
- Over half of American travelers are excited about Christmas this year even though a similar proportion are worried about spending time with family because of the coronavirus situation.
- Baby Boomers are the Grinchiest generation.



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