DESTINATION ANALYSTS CORONAWIRUS TRAWEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF JANUARY 11th, 2021

Destination Analysts

About Destination Analysts

Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

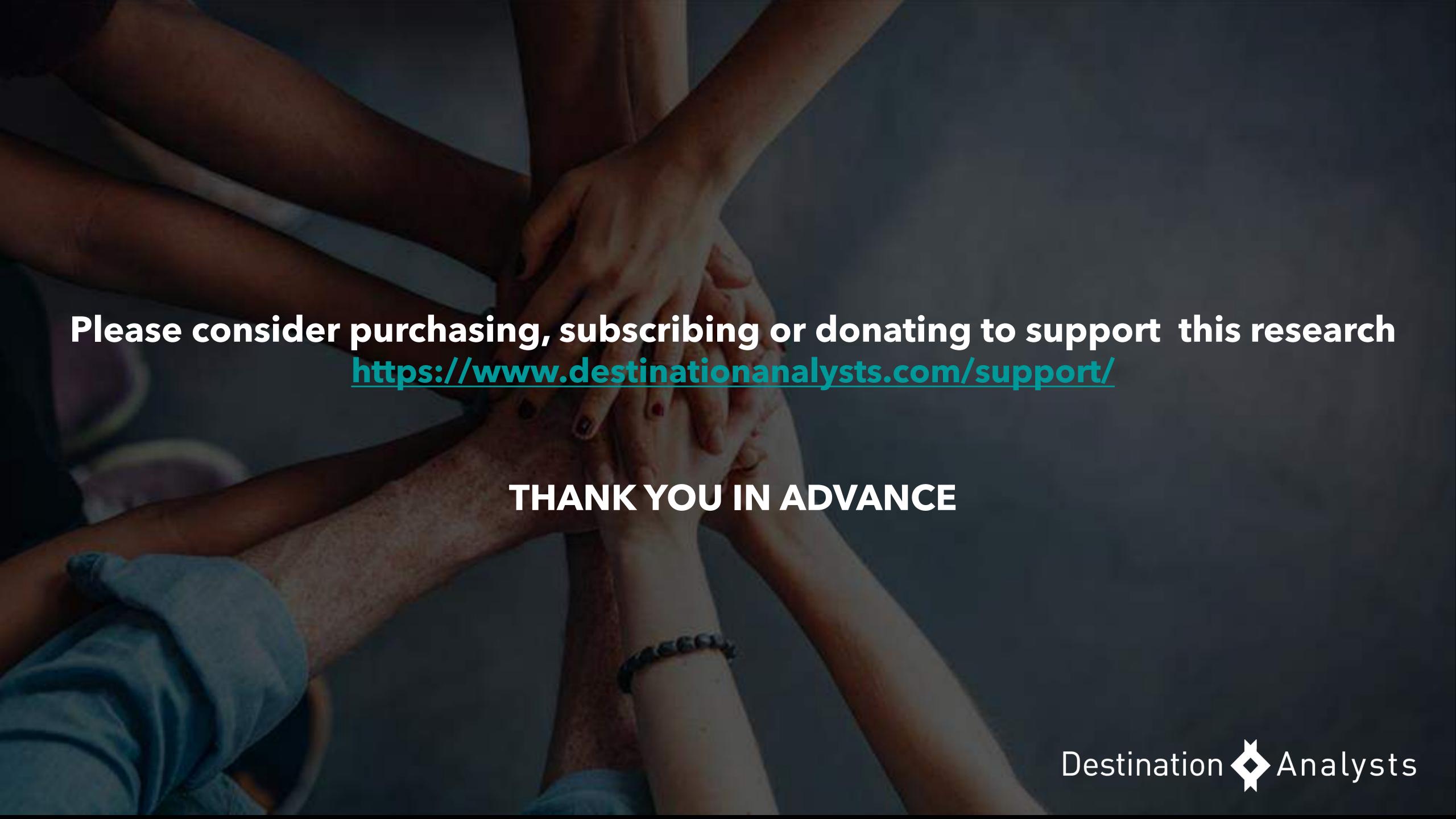
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

In addition to this report, Destination Analysts conducts **The State of the American Traveler** and **The State of the International Traveler**—the travel industry's premier studies for tracking traveler sentiment and global destination brand performance—as well as **The CVB and the Future of the Meetings Industry** annual study helping destination marketing organizations transform their meetings sales and services strategies.

IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.







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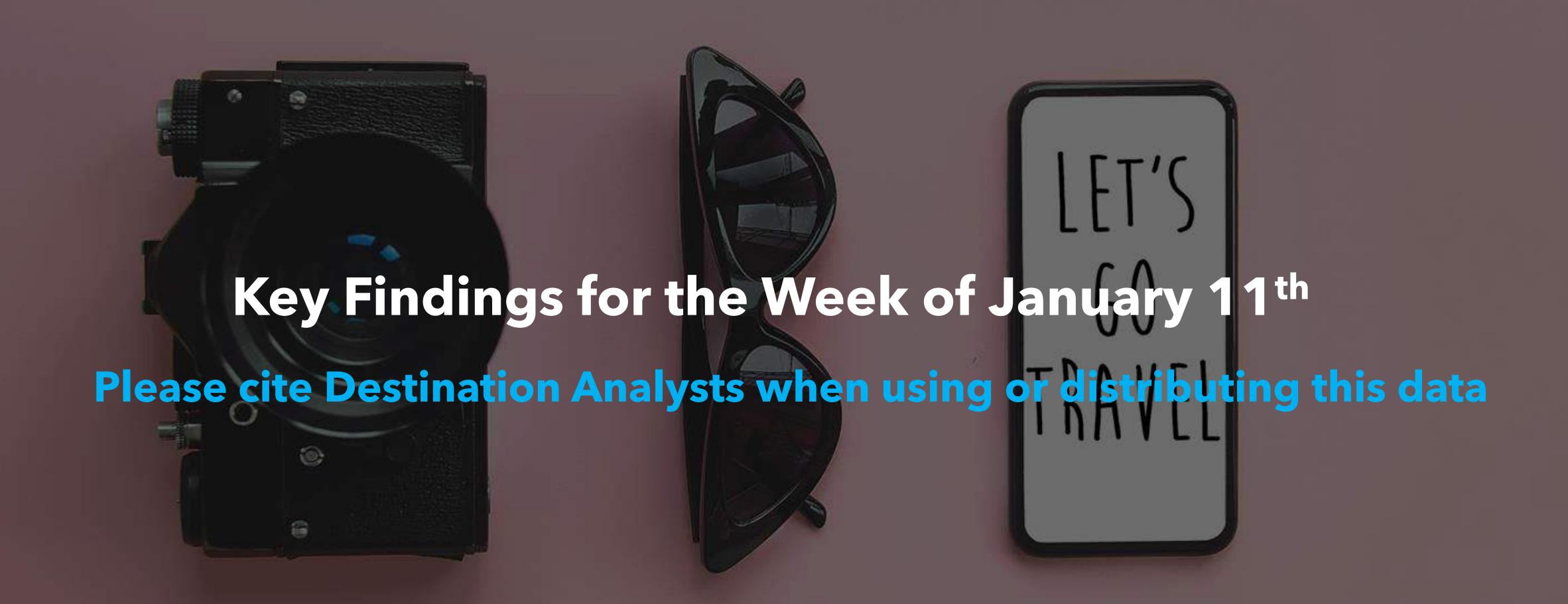


Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

After this week's travel insights update, we will be joined by a panel of travel marketers from Washington, DC, Dallas and Denver for an important discussion about their perspectives on the key trends to look out for in 2021, targeting and engaging with travelers and the rising popularity of TikTok.

Sign up to attend the webinar on Tuesday, January 12th at 11:00am ET <u>here</u>.





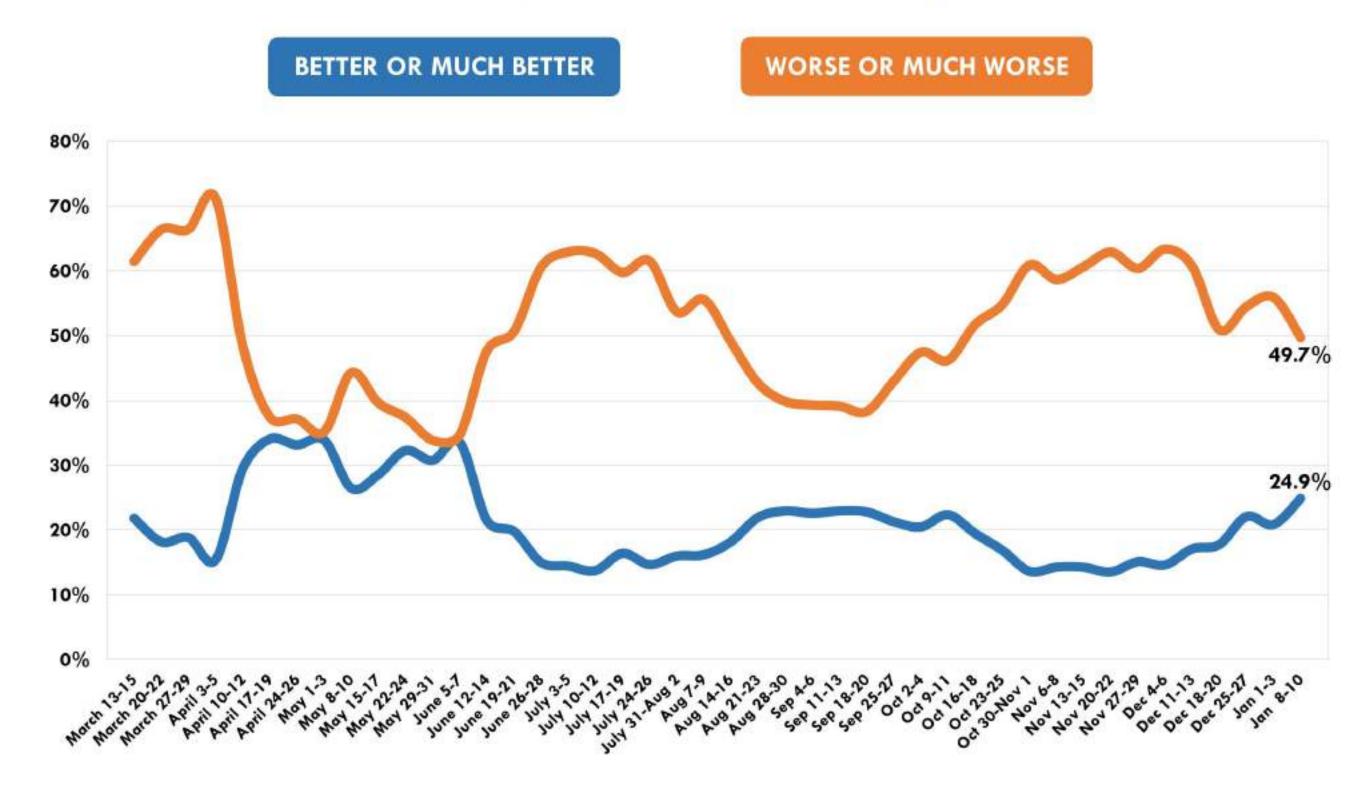
Expectations for the Coronavirus Outbreak

Across the country, anxiety was up this week, particularly about personally contracting COVID-19 (72.5% highly concerned) and the pandemic's impact on the national economy (85.1% highly concerned).

But as Americans look out over the next month, they see an improving situation—the percent of Americans who feel the pandemic will get worse in the U.S. in the next month dropped below 50% for the first time since the week of October 12th, and the percent who feel things will get better rose to 24.9%, the highest it has been in 7 months, since the week of June 8th. For the travel industry, this resulted in a delightful shift in positive sentiment towards travel.

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

MARCH 15, 2020 - JANUARY 10, 2021



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 1-44 data. 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, 1,204, 1,203, 1,203, 1,203, 1,205, 1,205, 1,205, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)



Vaccines and Optimism for the Next 6 Months

Undoubtedly, the availability and ongoing distribution of COVID-19 vaccines are a contributor to these feelings of encouragement.

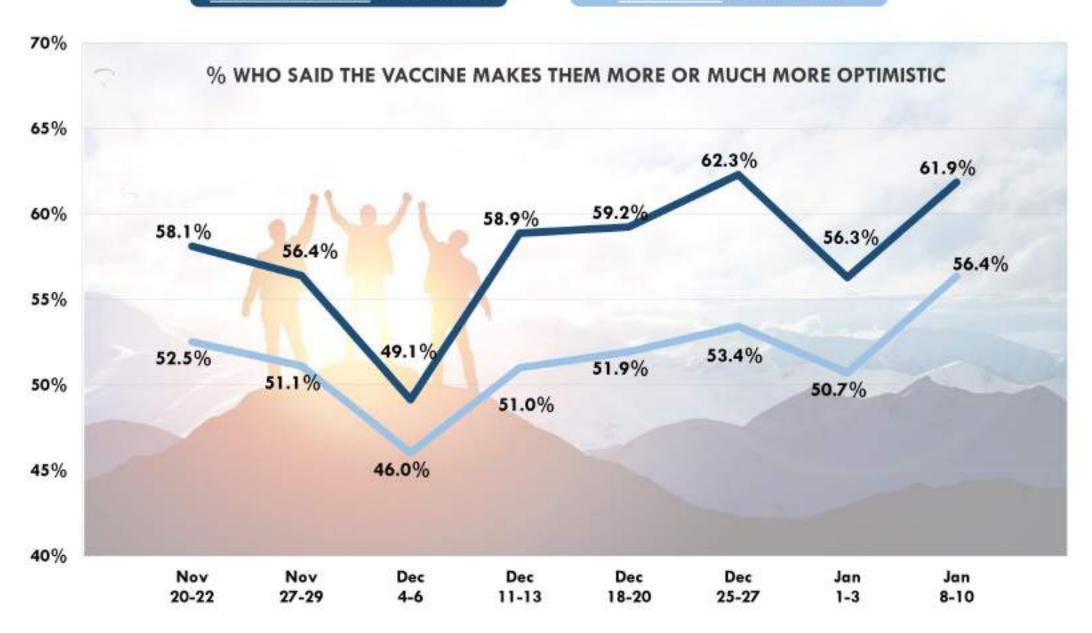
- A high of 67.8% of American travelers believe the COVID-19 vaccines are safe.
- Last week, more American travelers than ever said they would be getting vaccinated against the virus, and this week that figure rose again to 61.4%.
- The percent of those with school-age children who say they will inoculate their kids increased to 53.2%, after being below half for the last 6 weeks.
- Most American travelers who will take a COVID-19 vaccine believe they will get their doses in the first half of this year.
- In terms of how this impacts their travel, while 48.7% still say they will engage in some travel avoidance until vaccines widely available, there was a 5 percentage point rise in the proportion of American travelers who say the vaccines make them more optimistic about life returning to normal in the next six months, which is now at 61.9%. There was a similar increase in the proportion of American travelers who say the vaccines make them more optimistic about being able to safely travel in the next six months (56.4%—a high), as well as a rise in the number of travelers saying they have begun planning and booking trips specifically in anticipation of vaccines being available—now at 33.7%.

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VACCINES AND OPTIMISM FOR THE NEXT 6 MONTHS

NOVEMBER 20, 2020 - JANUARY 10, 2021

More Optimistic for a Return to Normal in 6 Months More Optimistic for Safe Travel in 6 Months



Question 1: 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.

Question 2: Does recent news about vaccine developments affect your optimism about being able to travel safely in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about BEING ABLE TO TRAVEL SAFELY in the next six months.

(Base: Waves 37-44 data. All respondents, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

Openness to Travel Inspiration

Amongst the most critical indicators of Americans' path to a travel norm is the plummet in perceptions of travel activities as unsafe.

This week, an average of 50.1% perceive the travel and leisure activities we track as unsafe, which is within 0.9% of where this metric was March 15th and the lowest it has been since that date. More Americans are confident they can travel safely now, rising to 31.8% from 24.7% last week. Loss of interest in travel for the time being declined to 42.5%, down from a high of 49.5% one month ago. Those whose normal travel patterns were disrupted by the pandemic are now missing travel even more, with nearly two-thirds saying they miss traveling "very much." Americans' openness to travel inspiration reached a pandemic-period peak, measuring 6.0 on a scale of 0-10. Those in a travel readiness state-of-mind soared nearly 12 percentage points to 58.6%, also the highest it has been in the pandemic. Excitement levels about travel in 2021 grew to 6.1 from 5.8 last week.

OPENNESS TO TRAVEL INSPIRATION

MARCH 13, 2020 - JANUARY 10, 2021



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



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

(Base: Waves 1-44 data. 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, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)



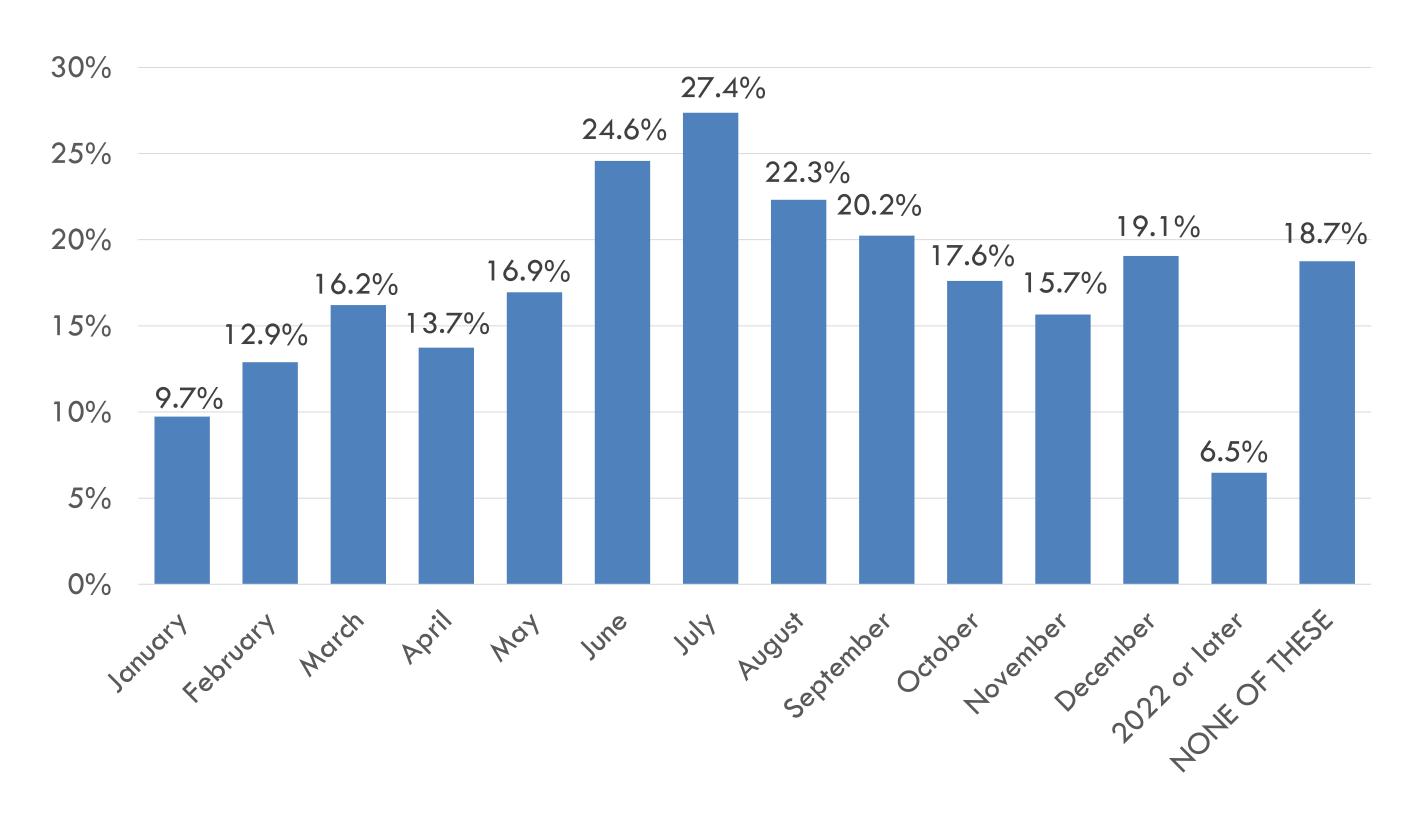
Expected Travel in 2021

As Americans plan their travel for 2021, July is still the peak month, with 27% saying they have at least tentative plans to travel then.

Right now, 31.4% of American travelers anticipate their next air trip to be in the first half of the year. The traumatic events of last week may have disrupted the amount of time devoted to travel dreaming (there was a small decline in those that said they had day-dreamed about travel in the last week), although twice as many report having actually made travel reservations last week than the week prior (15.9% up from 8.0%).

MONTHS OF EXPECTED LEISURE TRIPS IN 2021

AS OF JANUARY 10TH, 2021



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

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



American Travel in the Next 3 Months

When it comes to travel in the next three months, more Americans are seeing this as a reality.

This week, 48.9% say they will take at least one leisure trip in the next 12-weeks, up from 37.5%.

Of those Americans who will travel, they anticipate 1.7 overnight trips on average, largely within 250-miles of where they live. Although the average anticipated spending on travel in this period has increased to \$1,398, 50.5% report they will be more budget conscious. In fact, 43.0% of all American travelers say discounts and price cuts can motivate them to take a trip they had not previously considered—a 43-week high.

AMERICAN TRAVEL IN THE NEXT 3 MONTHS

AS OF JANUARY 10, 2021

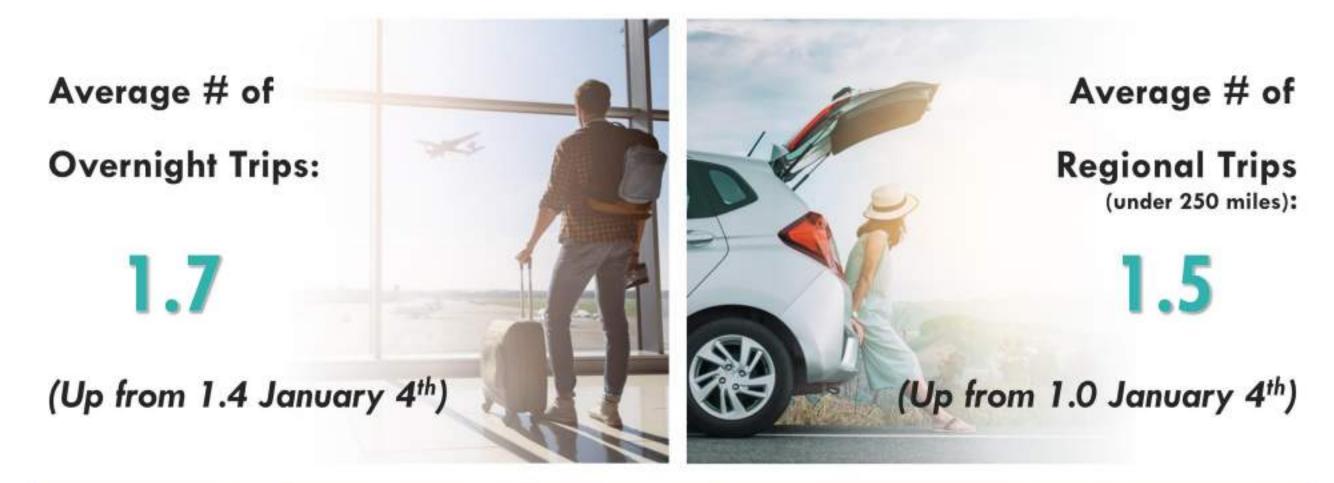
48.9% Expect to take at least 1 trip (Up from 37.5% January 4th)

Average number of trips (Up from 0.7 January 4th)

1.0

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)

OF THOSE TRAVELING IN NEXT 3 MONTHS



Average Travel Spending = \$1,398 (Up from \$1,376 January 4th)



(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)



Receptivity to Marketing Channels

With the important increase in Americans' desire for travel inspiration, travel marketers will be keen to reach them.

This week we asked American travelers which channels they were most receptive to learning about destinations to visit. While online content found through search engines, email and travel/lifestyle magazines are good bets across generations, streaming video services and social media are key for inspiring younger travelers.

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



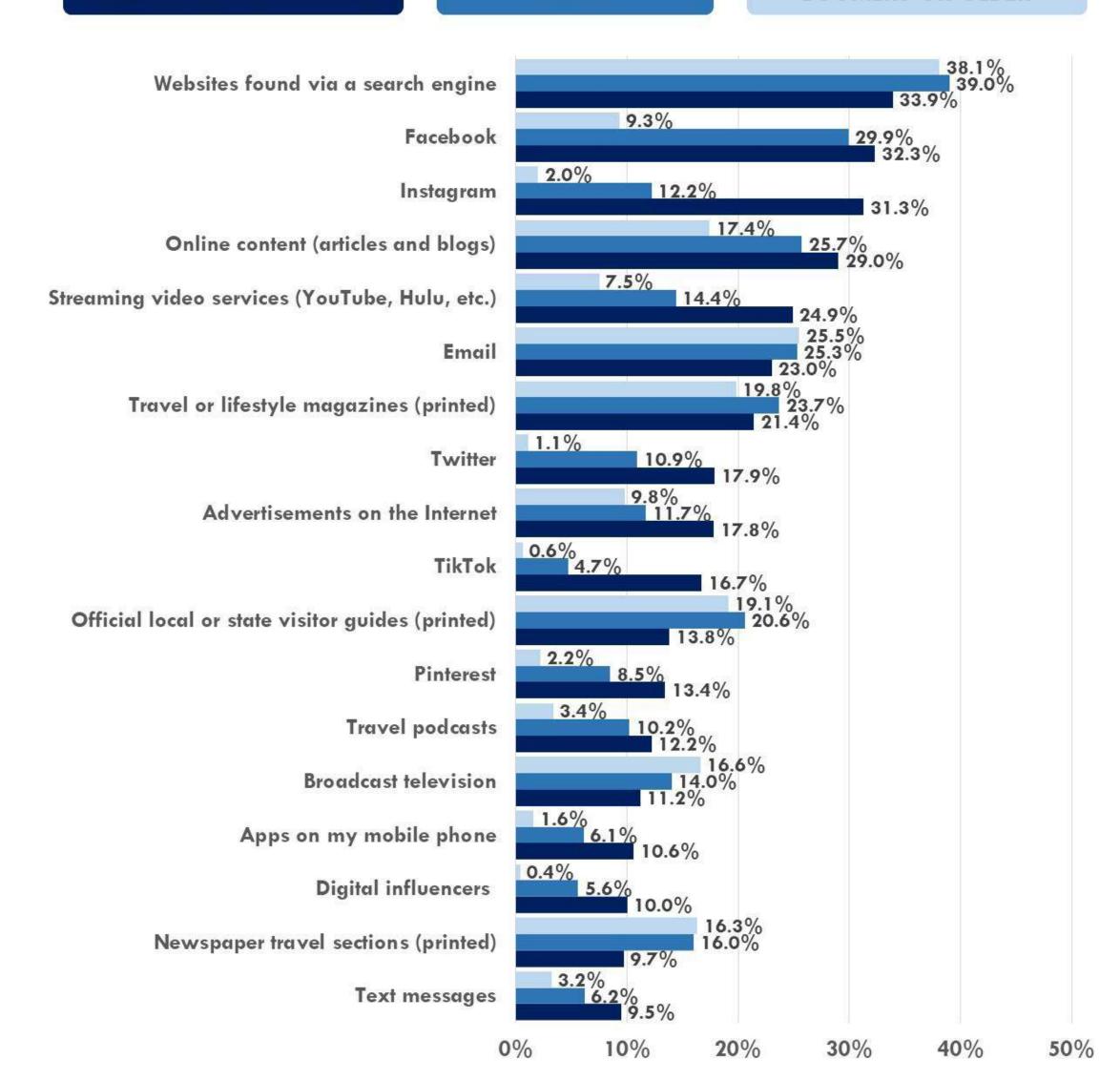
CHANNELS AMERICANS FEEL RECEPTIVE TO TRAVEL MARKETING IN—BY GENERATION

AS OF JANUARY 10, 2021

MILLENNIALS OR YOUNGER

GEN X

BOOMERS OR OLDER



Feelings Seeing an Ad Promoting Tourism to Own Community

It's also essential to track how Americans are feeling about travel to and within their own communities.

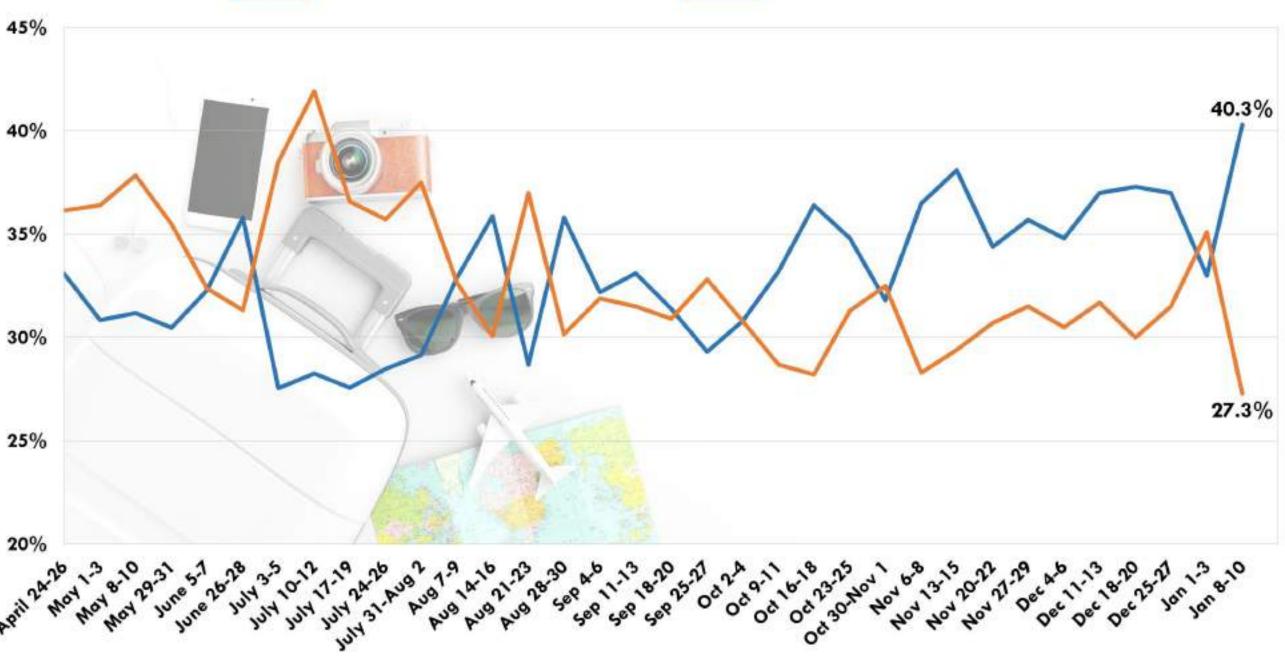
This week, 43.8% feel comfortable going out for leisure in their own community, the highest this has been in 2 months. While 53.5% still do not want visitors to their communities right now, the percent that that said they would be happy if they saw an advertisement promoting their community as a place for tourists to come visit when it is safe hit 40.3%—another metric to hit a pandemic-period high this week.

FEELINGS SEEING AN AD PROMOTING TOURISM TO OWN COMMUNITY

APRIL 24, 2020 - JANUARY 10, 2021







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

(Base: Waves 7-9, 12-13 and 16-44. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,207, 1,206 and 1,225 completed surveys.)



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

What is a Predictive Index?



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

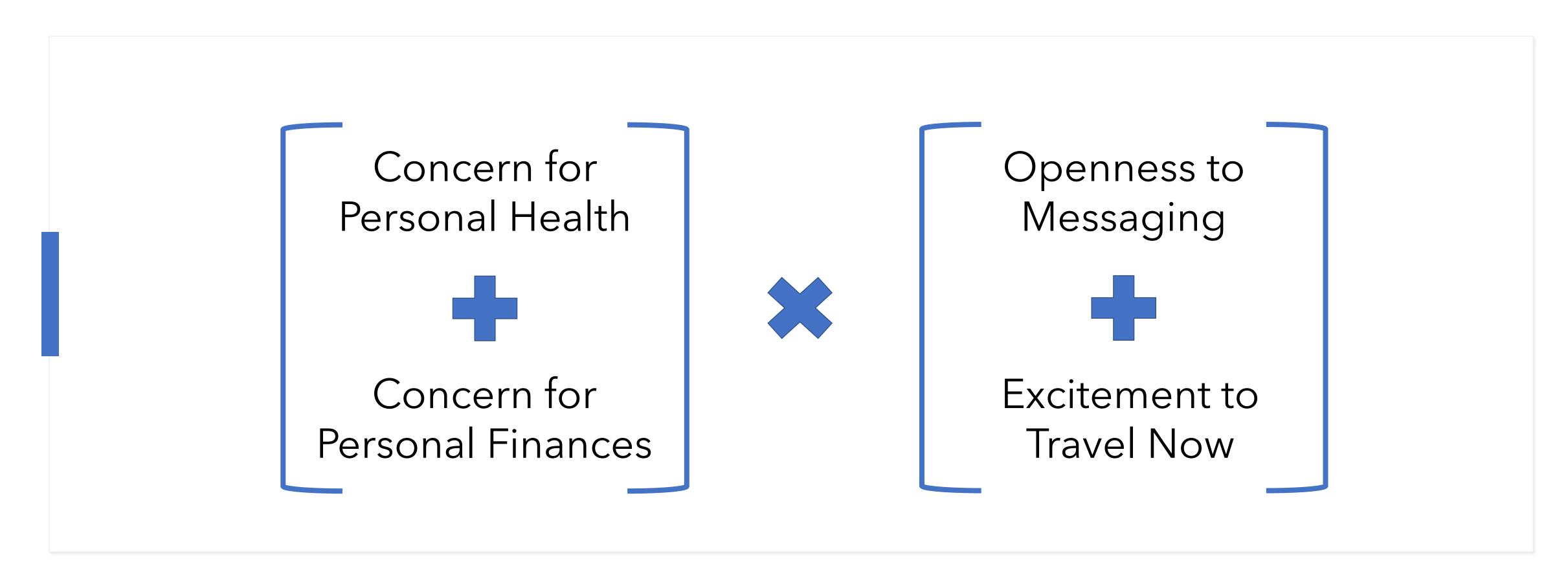


The goals are to identify:

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



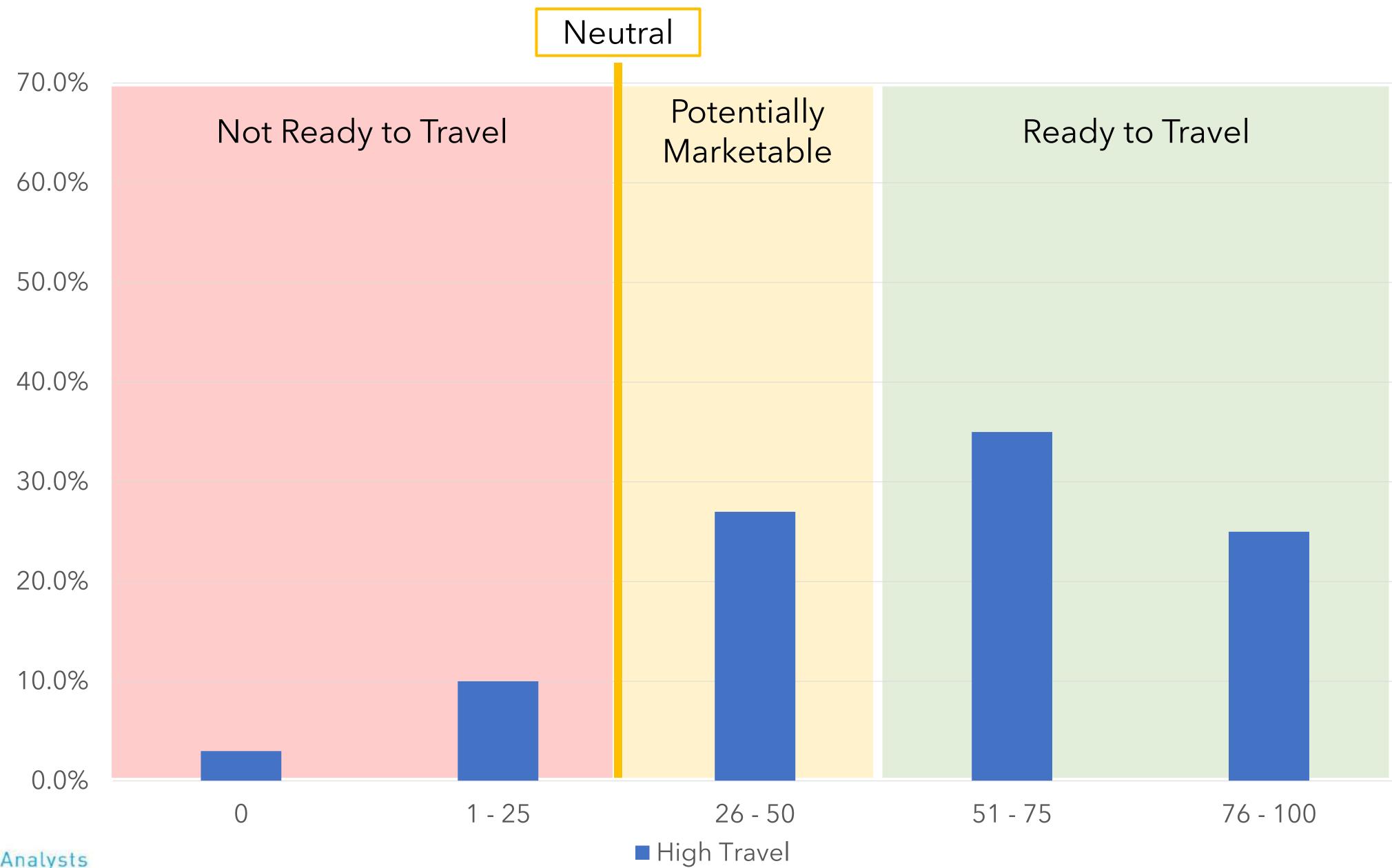
Predictive Index Formula



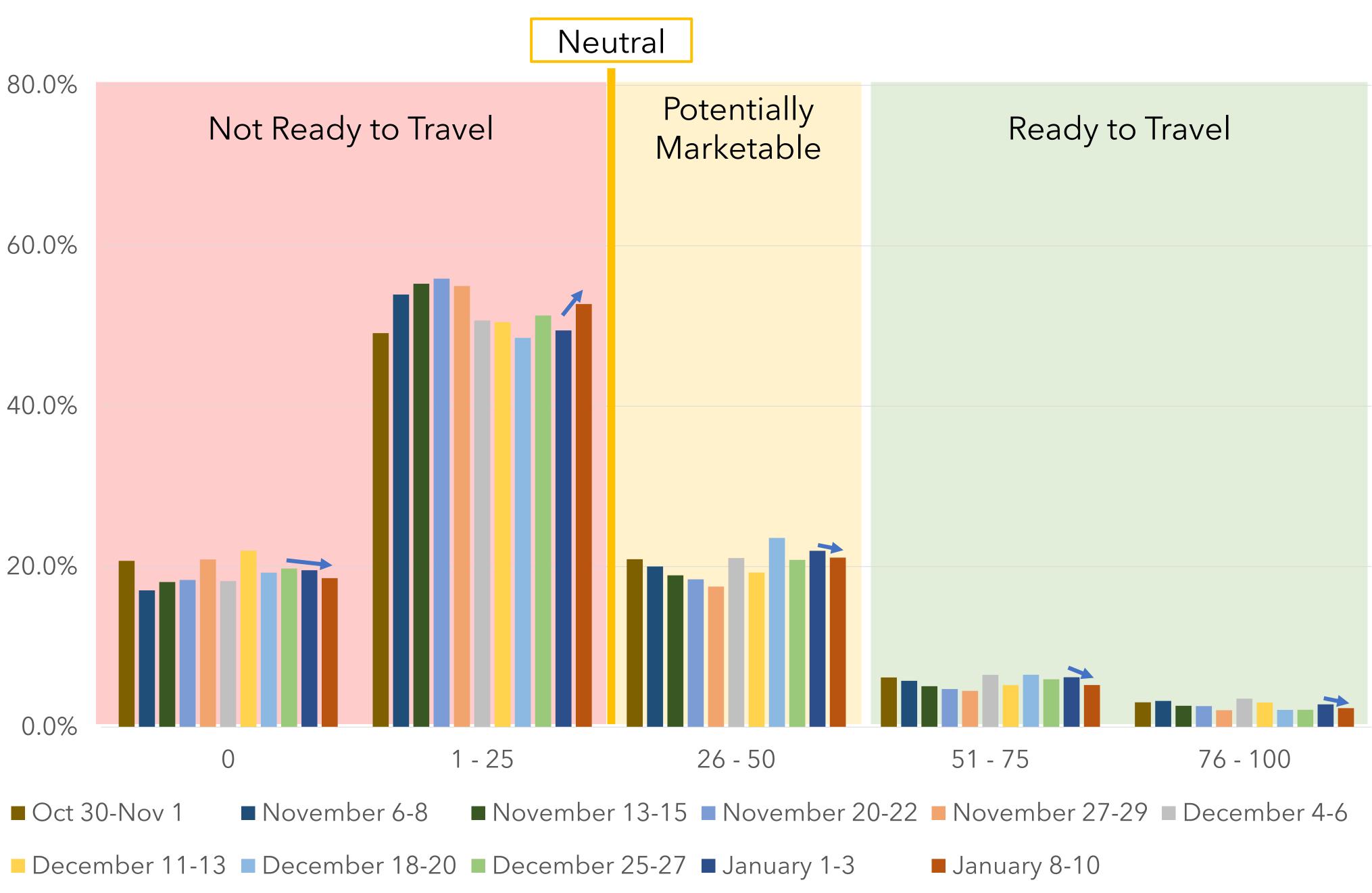
*Normalized to a 100pt scale

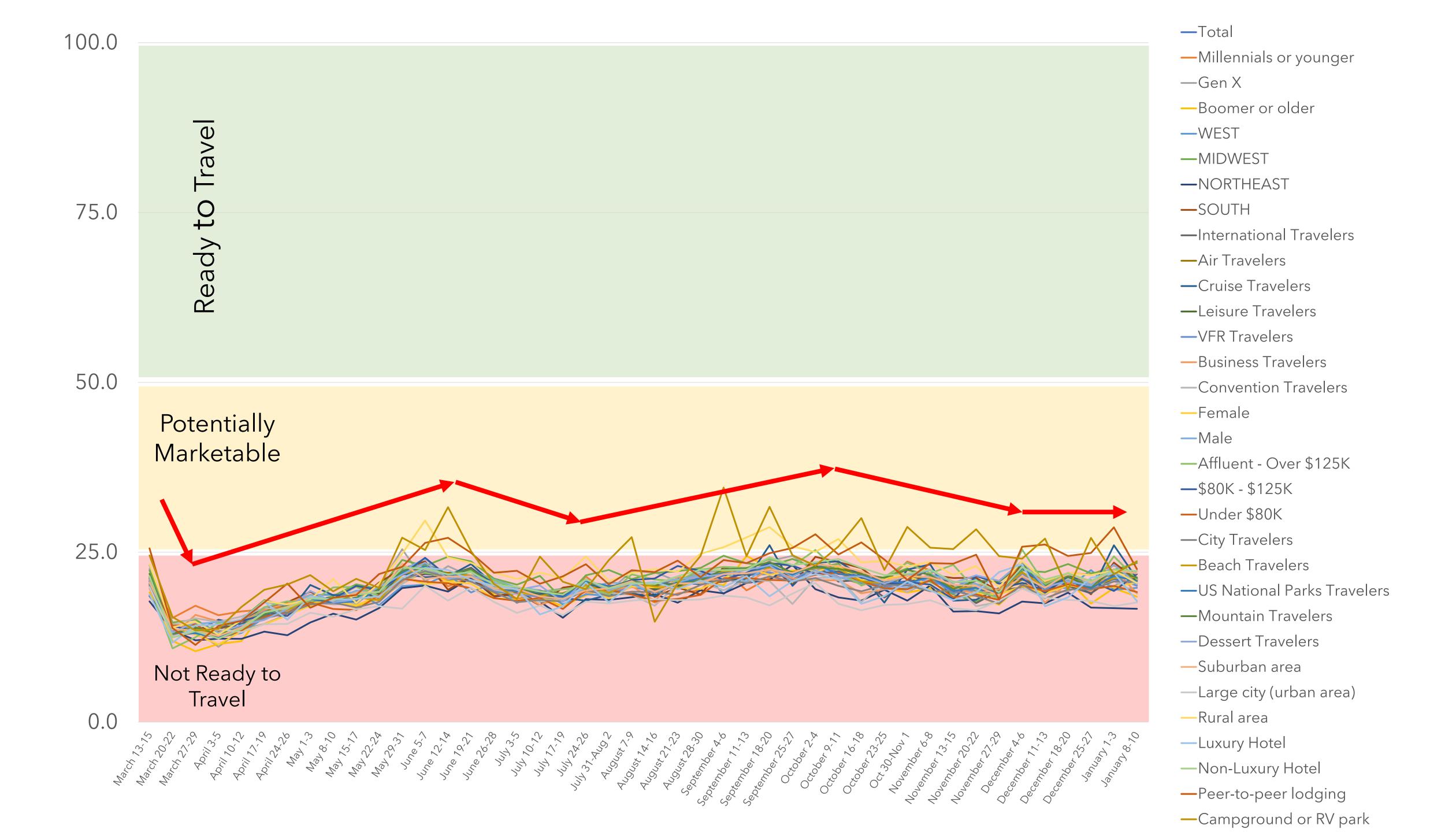


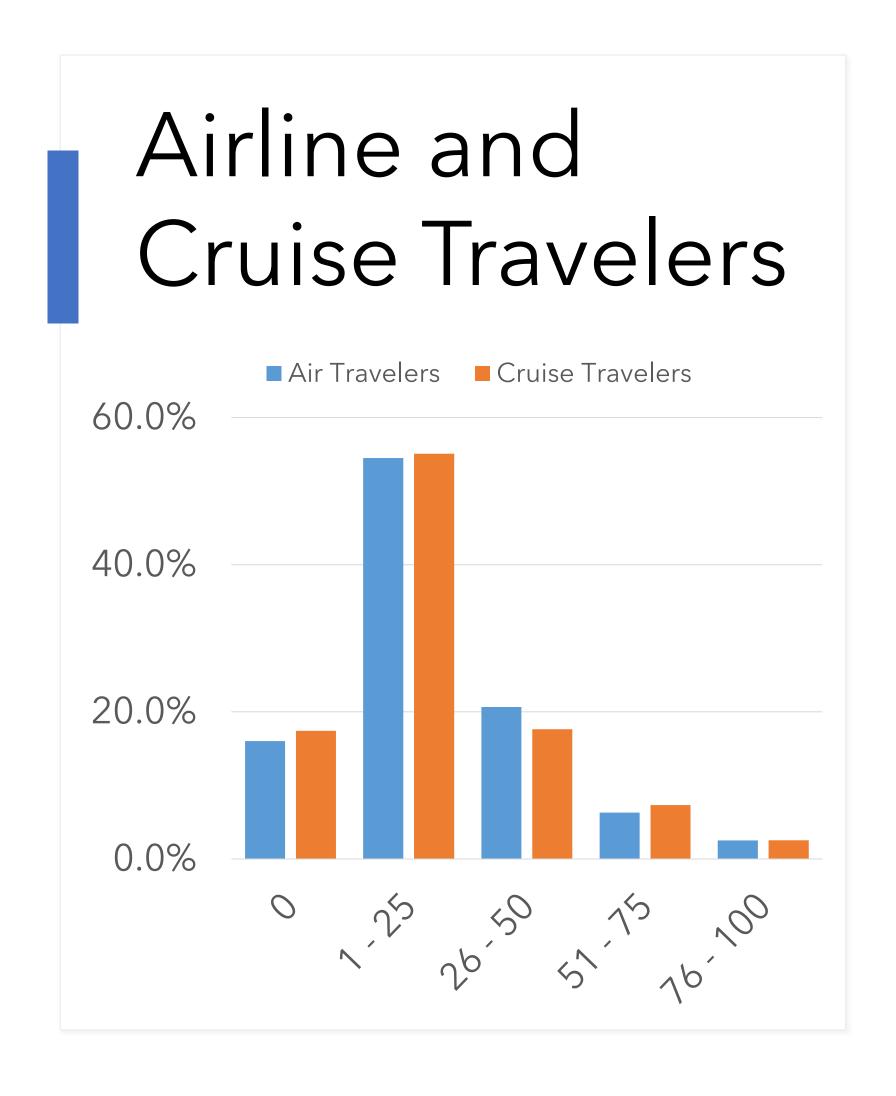
Healthy Travel Outlook

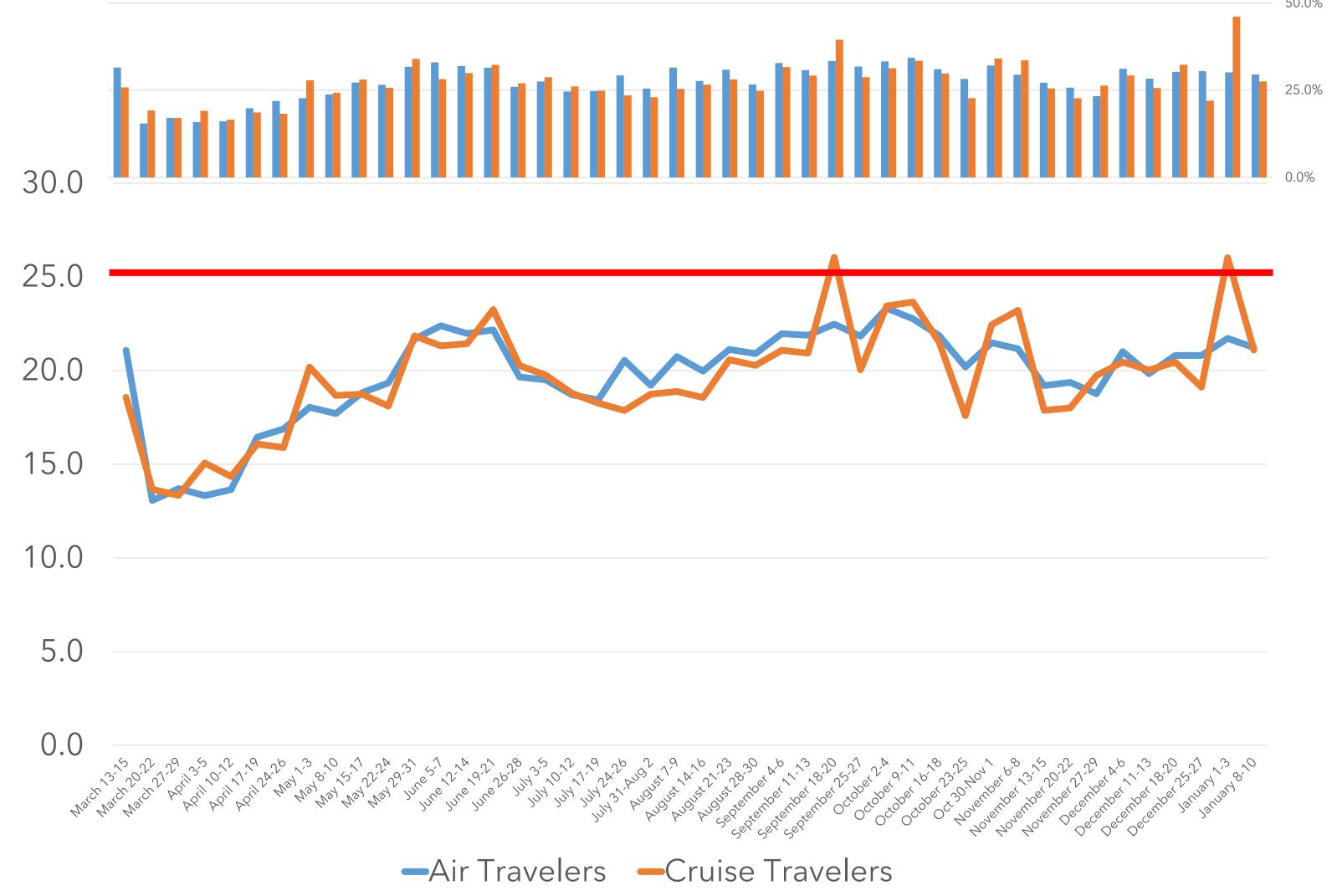


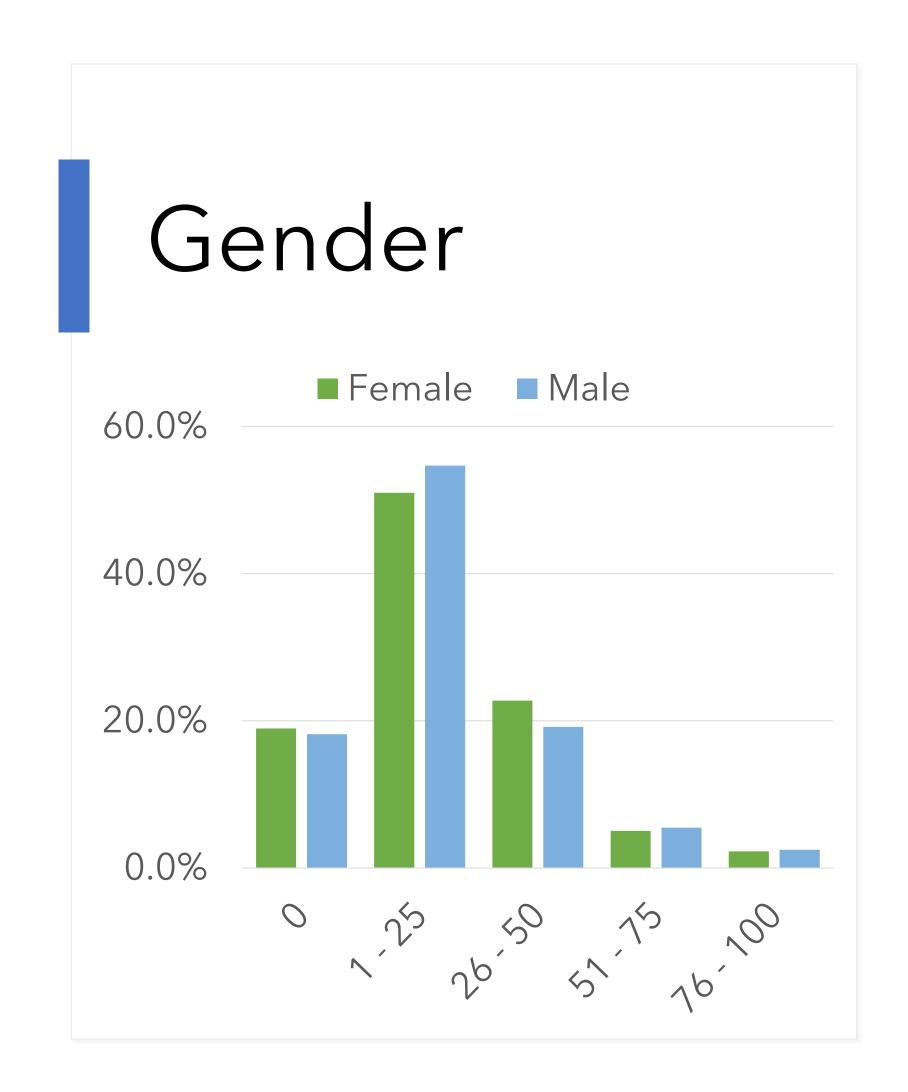
Travel Outlook

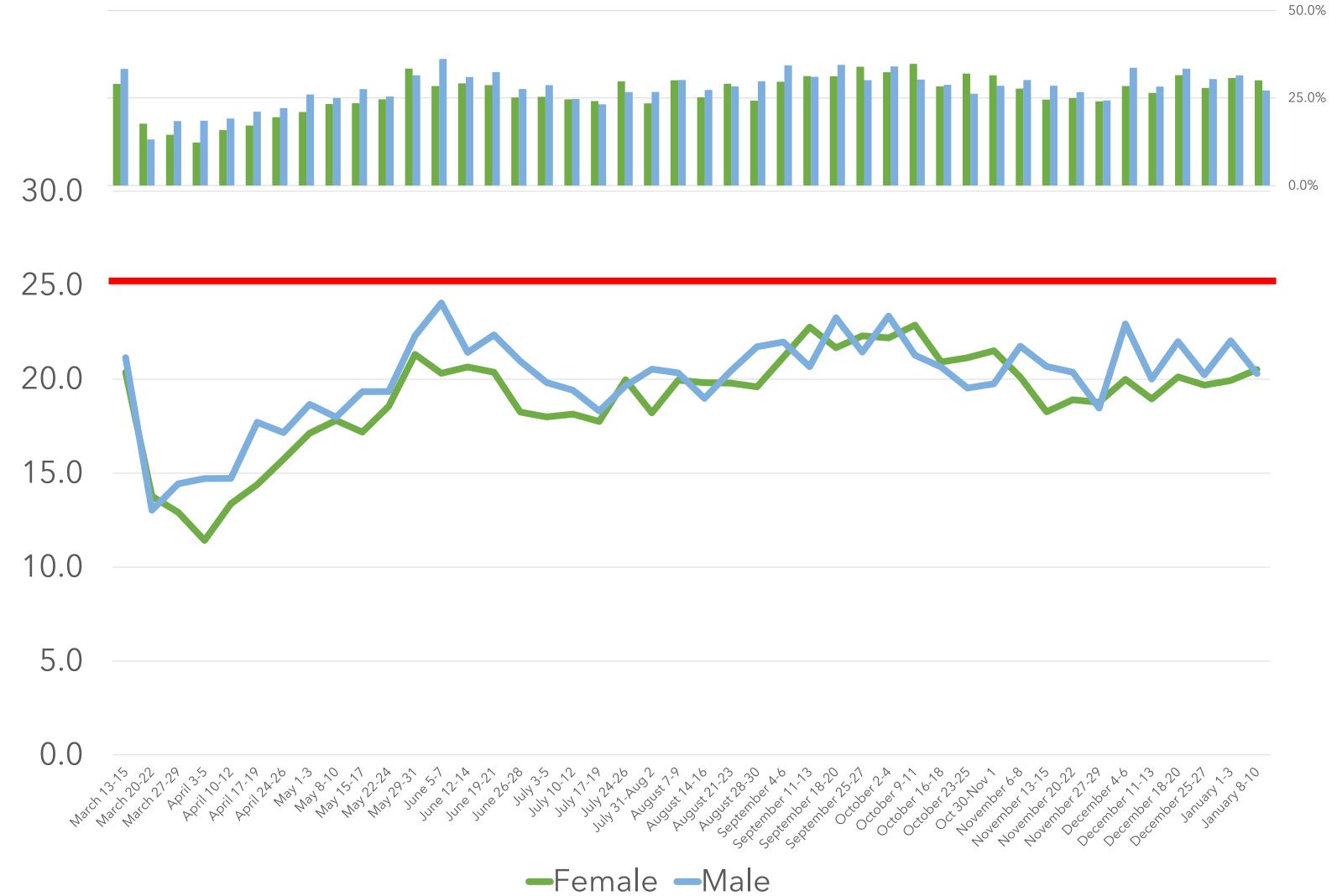


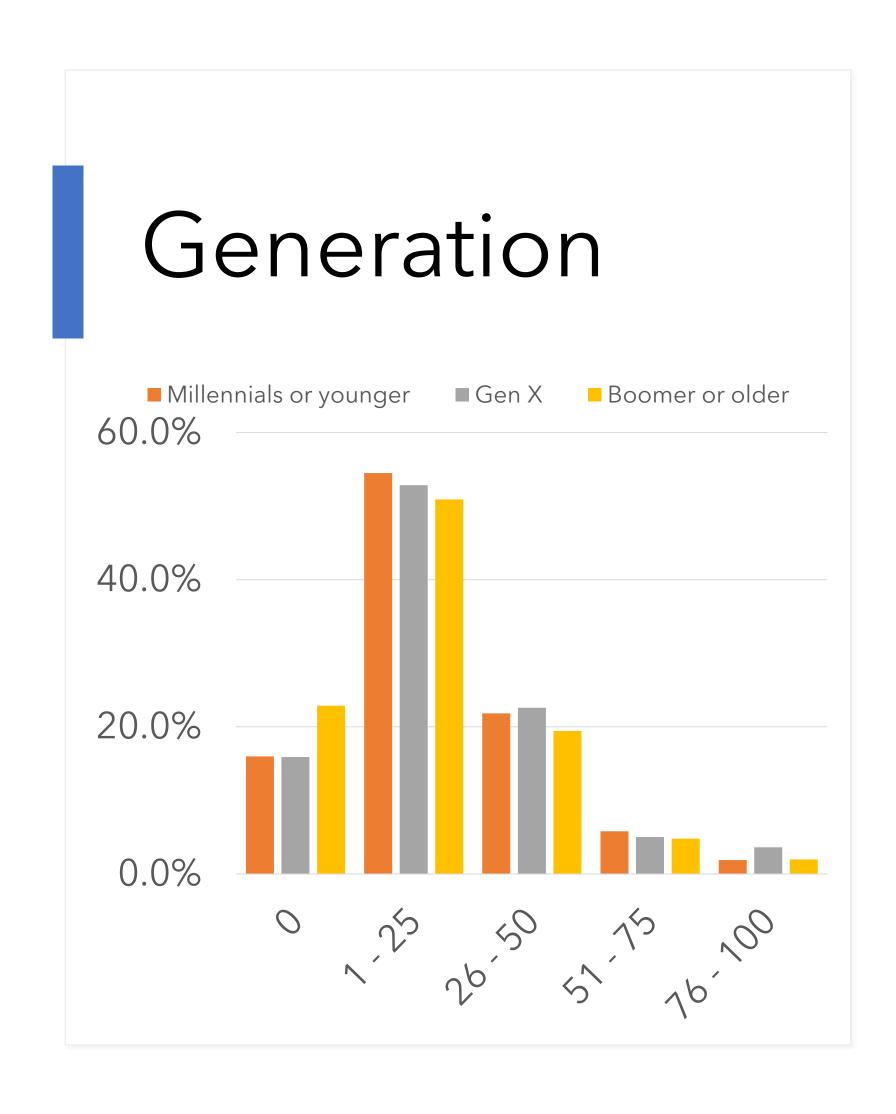


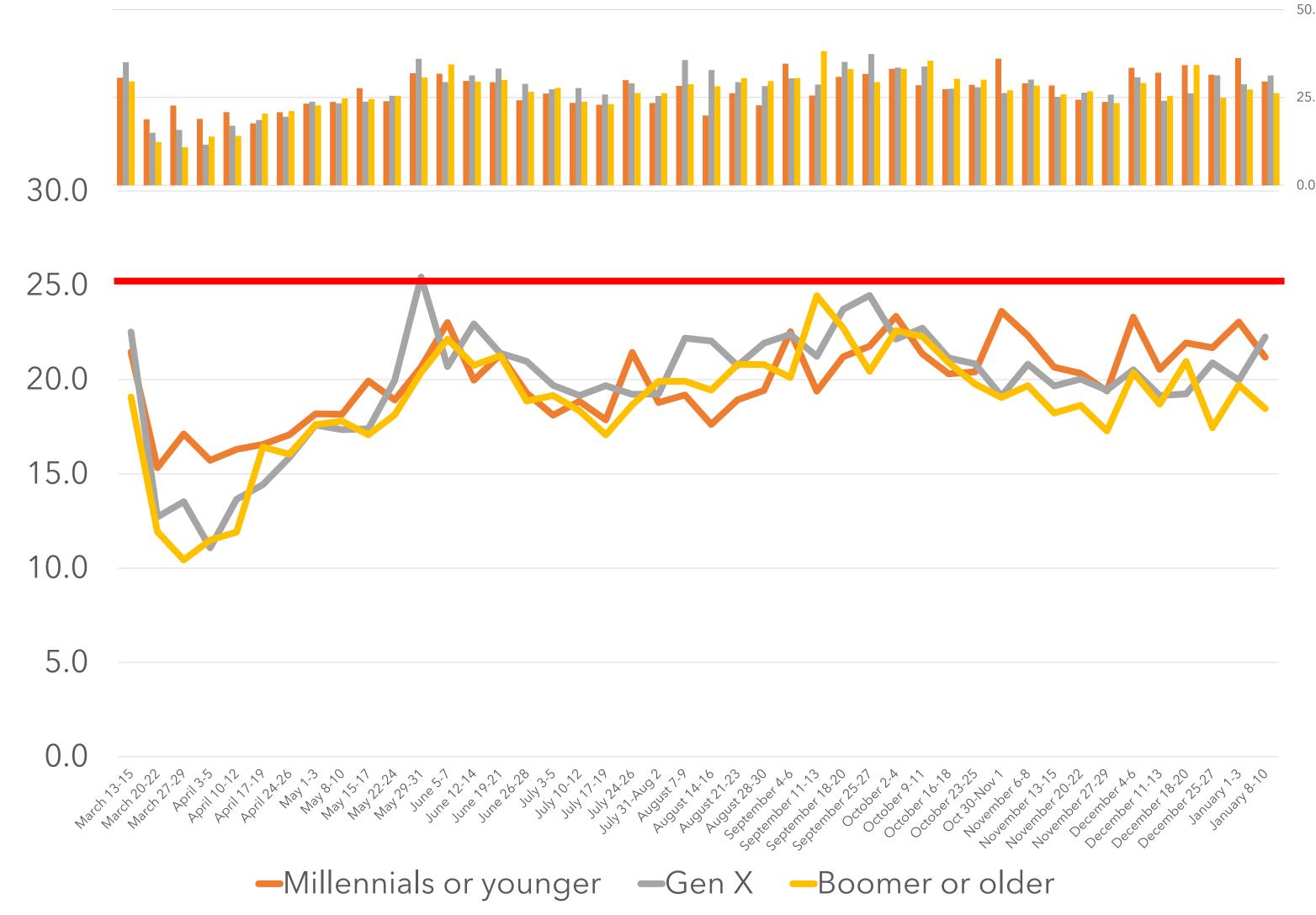


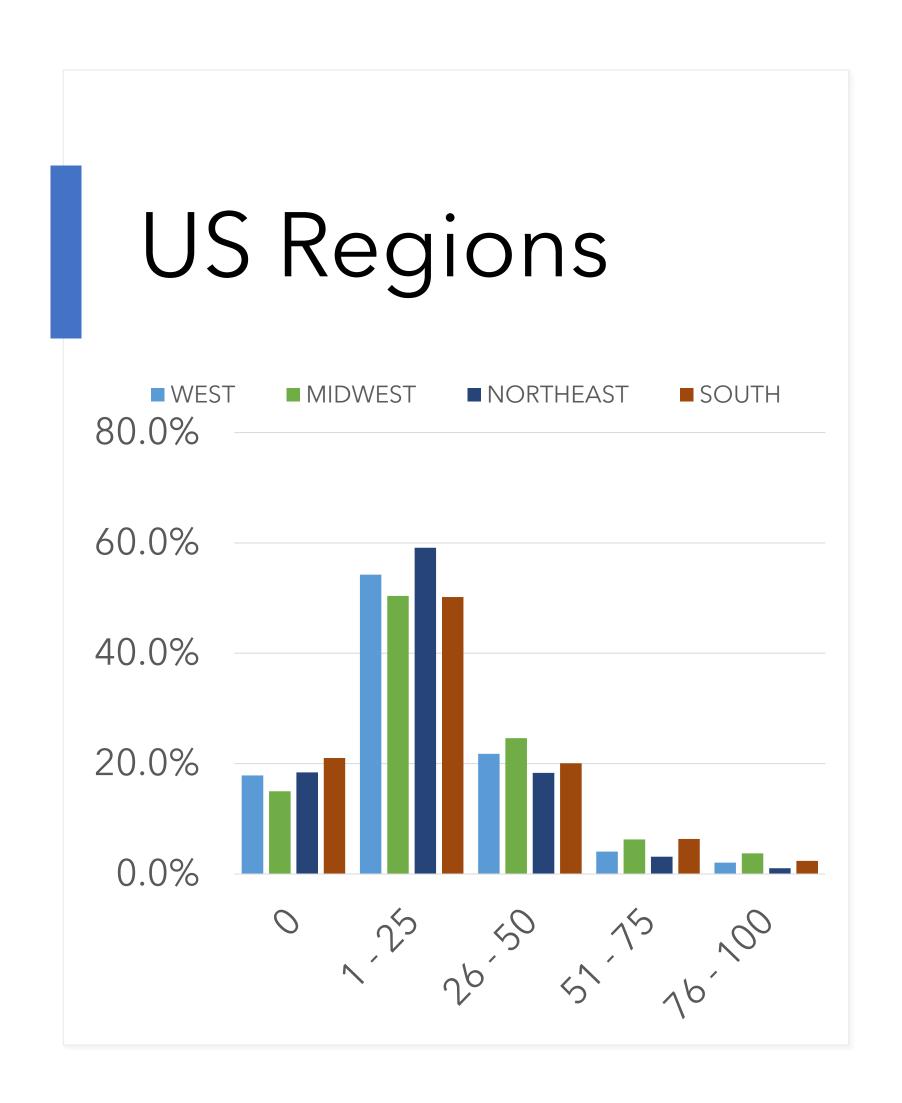


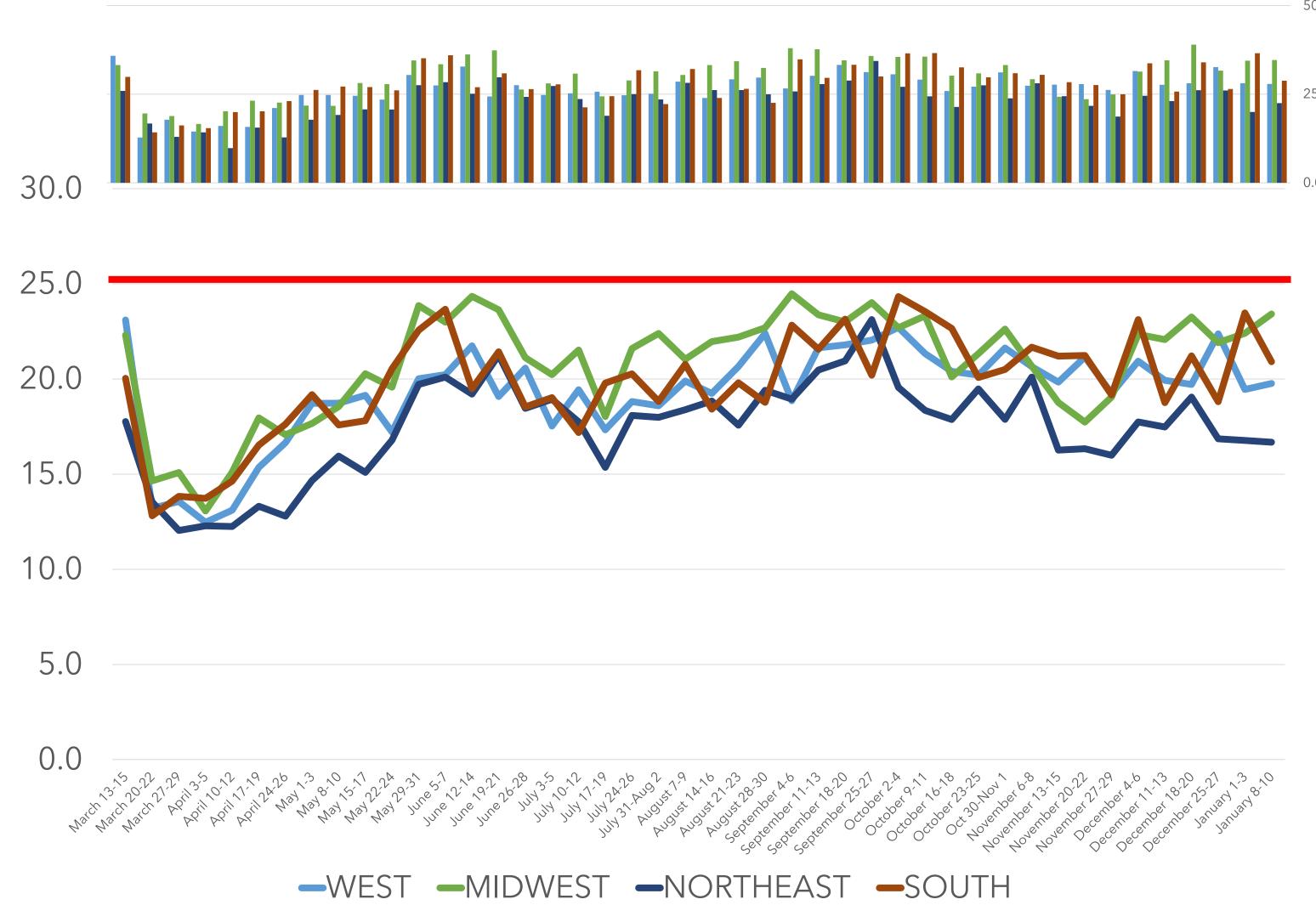


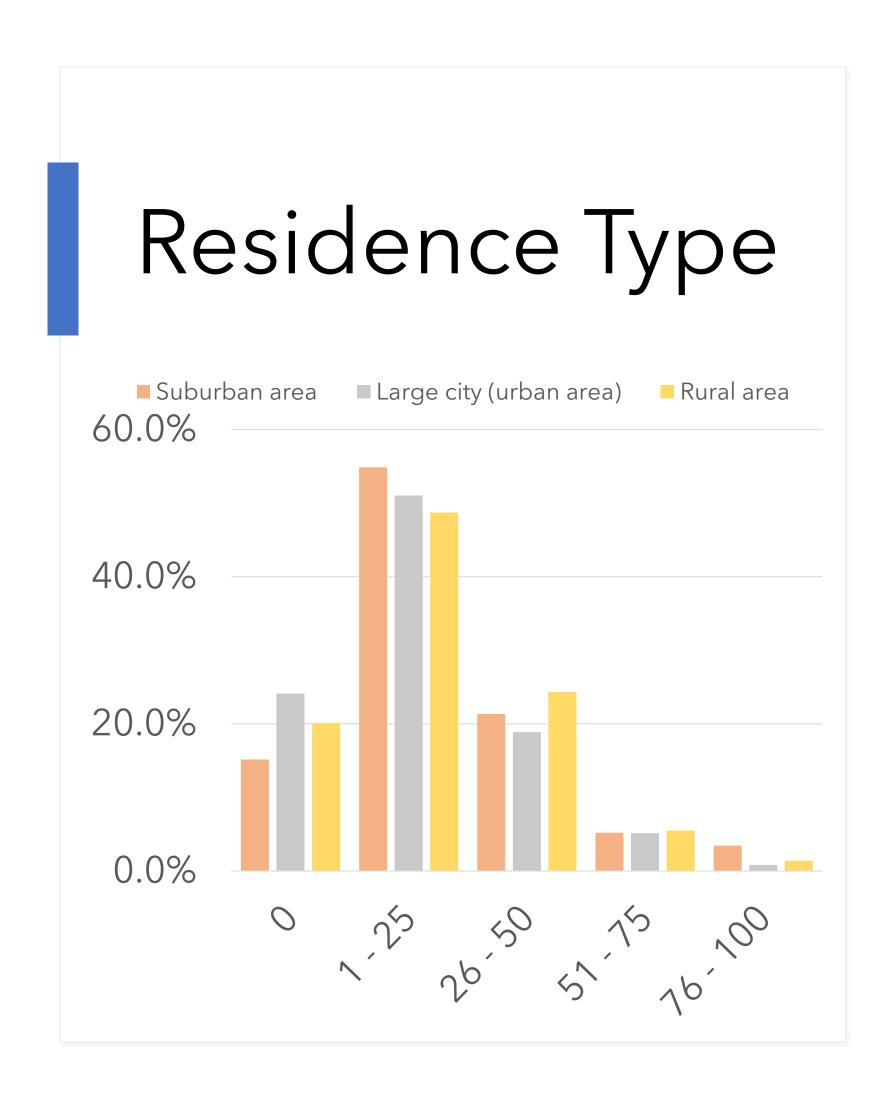


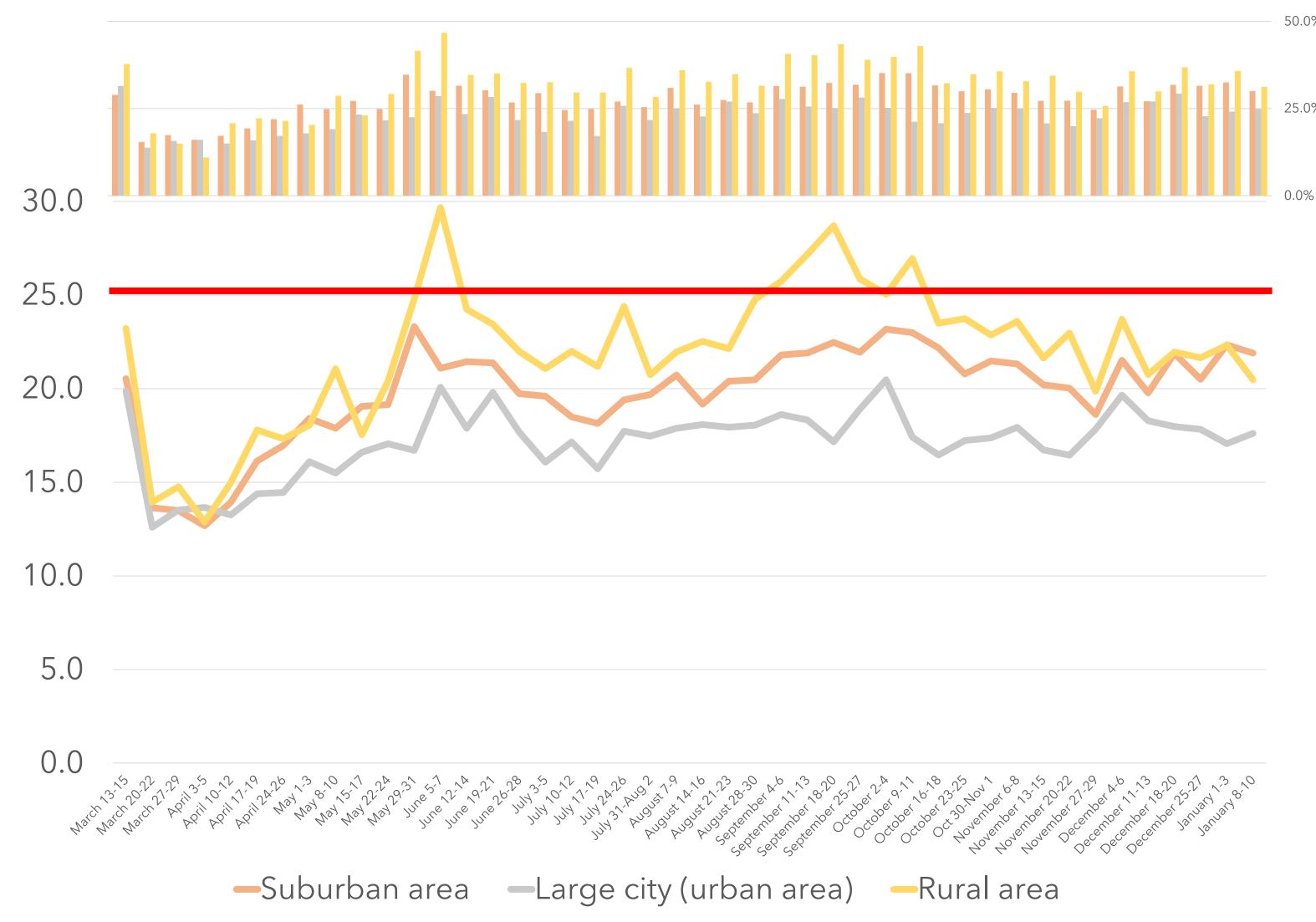


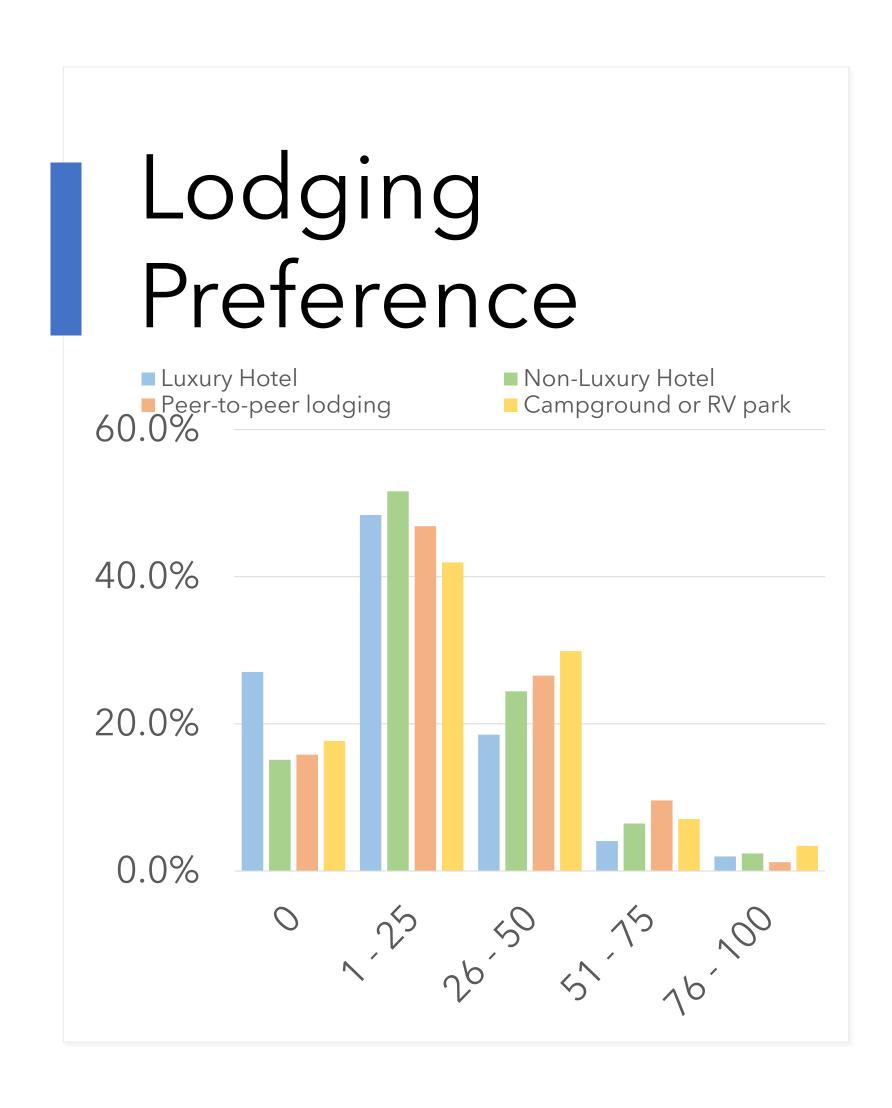


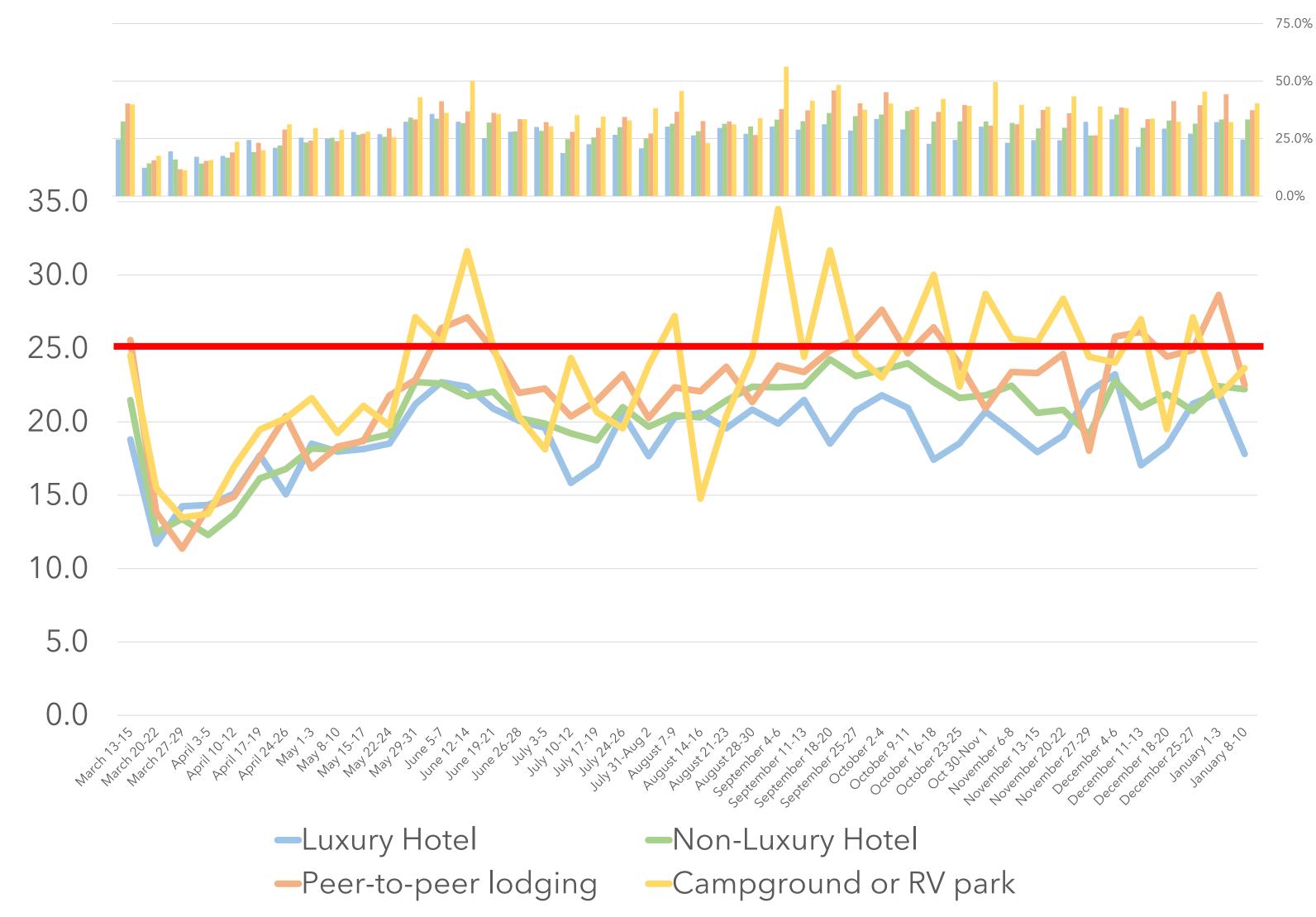














Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

 Our full hub of insights is available at https://www.destinationanalysts.com/covid-19-insights/





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JANUARY 19, 2021 JANUARY 26, 2021



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