

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF JANUARY 4<sup>th</sup>, 2021



# 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 our webinar Tuesday and arm yourself with important travel trends and insights, as well as a sneak peak at the latest research on the meetings industry.**

**From our most recent edition of *The CVB and the Future of the Meetings Industry*, learn about the benefits and challenges that meeting planners anticipate for the future, the ideal functions and leadership of the CVB in the meeting planning process and the messaging and advertising that are most impactful right now.**

**Sign up to attend the webinar on Tuesday, January 5<sup>th</sup> at 11:00am ET [here](#).**





# Key Findings for the Week of January 4<sup>th</sup>

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# Confidence in Ability to Travel Safely Right Now

Welcome to 2021!

After dropping in the latter half of December, Americans pessimistic that the pandemic will get worse in the U.S. in the next month increased this week to 55.9%. As it concerns Americans’ personal anxiety about contracting COVID-19, this decreased in the last week (to 6.6/10 from 6.9/11), yet high concerns about their friends and family getting the virus remained stably elevated (7.3/10). Meanwhile, as Americans remain uncertain about the amount government-issued stimulus checks will ultimately be, there are rising anxieties about the pandemic’s impact on personal finances (6.0 up from 5.9) and the national economy (7.8 up from 7.5). And with coronavirus cases sustained at record-high levels, right now, just 41.9% of American travelers feel comfortable going out in their own communities for leisure activities—a metric that has still not returned to the pandemic period high of 47.4% registered the week of October 19th. Likewise, perceptions of travel activities as safe also remains unreturned to October levels. **In fact, nearly half of Americans say they are not confident they can travel safely in the current environment.**

## CONFIDENCE IN ABILITY TO TRAVEL SAFELY RIGHT NOW AUGUST 21, 2020 – JANUARY 3, 2021



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

(Base: Waves 24-34 and 39-43 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)



# Vaccine Influence on Travel

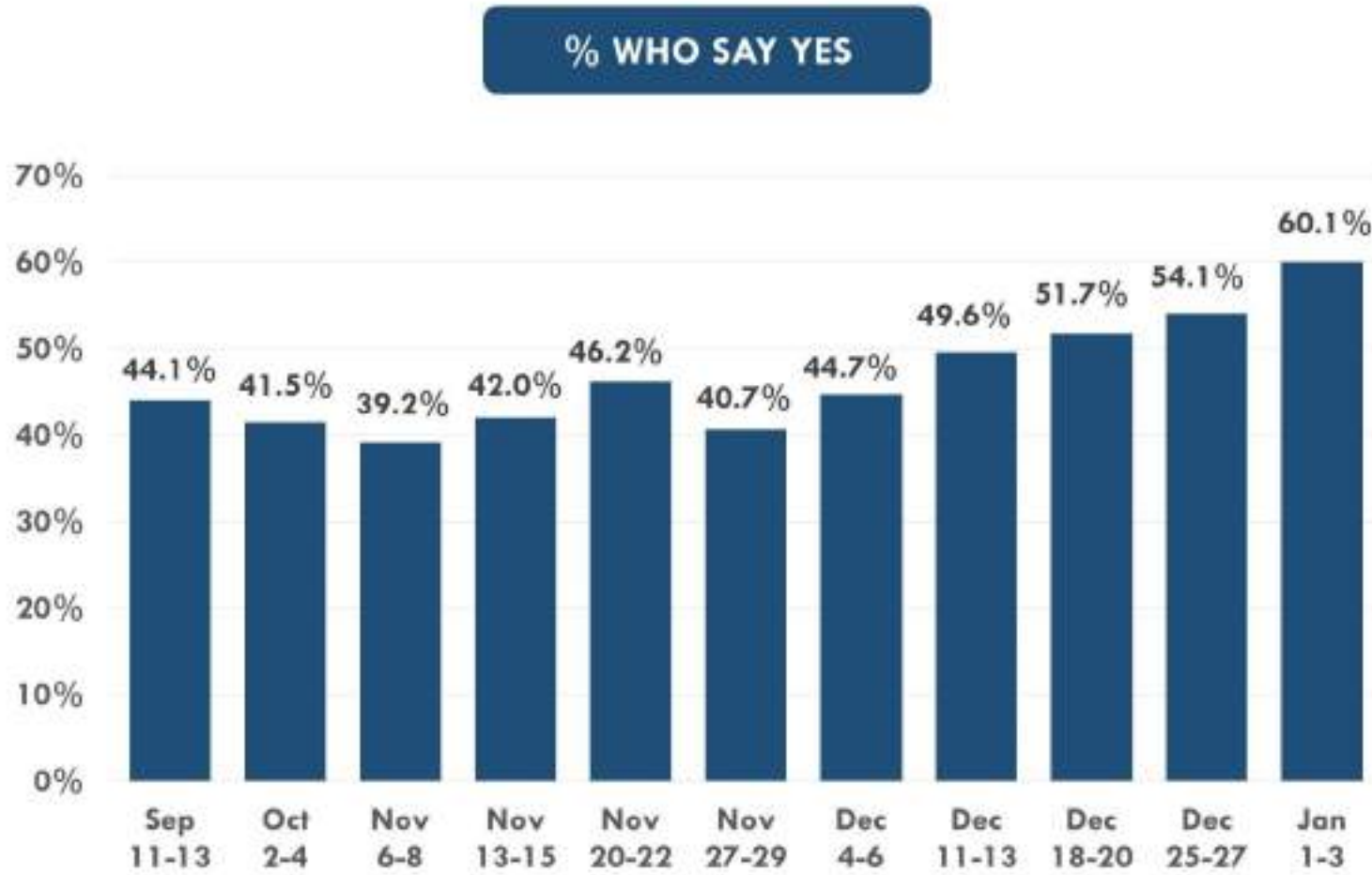
Yet a new year is an oft-renewer of hope and optimism, and travel is a beneficiary.

Americans highly open to travel inspiration is up over 6% in the last week (52.6%), and Americans in a travel ready state-of-mind returned to 52.9% after dropping below 50% at the end of December.

Inversely, loss of interest in travel has retreated 6 percentage points in the last three weeks to 43.3%, and avoidance of international travel (70.9%) and conventions/conferences (68.6%) both hit one of the lowest levels they have been since the pandemic began.

**The percent of American travelers who that say they will avoid travel until vaccines are widely available has fallen to 46.7% after being well over 50% the week of Christmas, and more Americans than ever are saying they will take the vaccine (60.1%).**

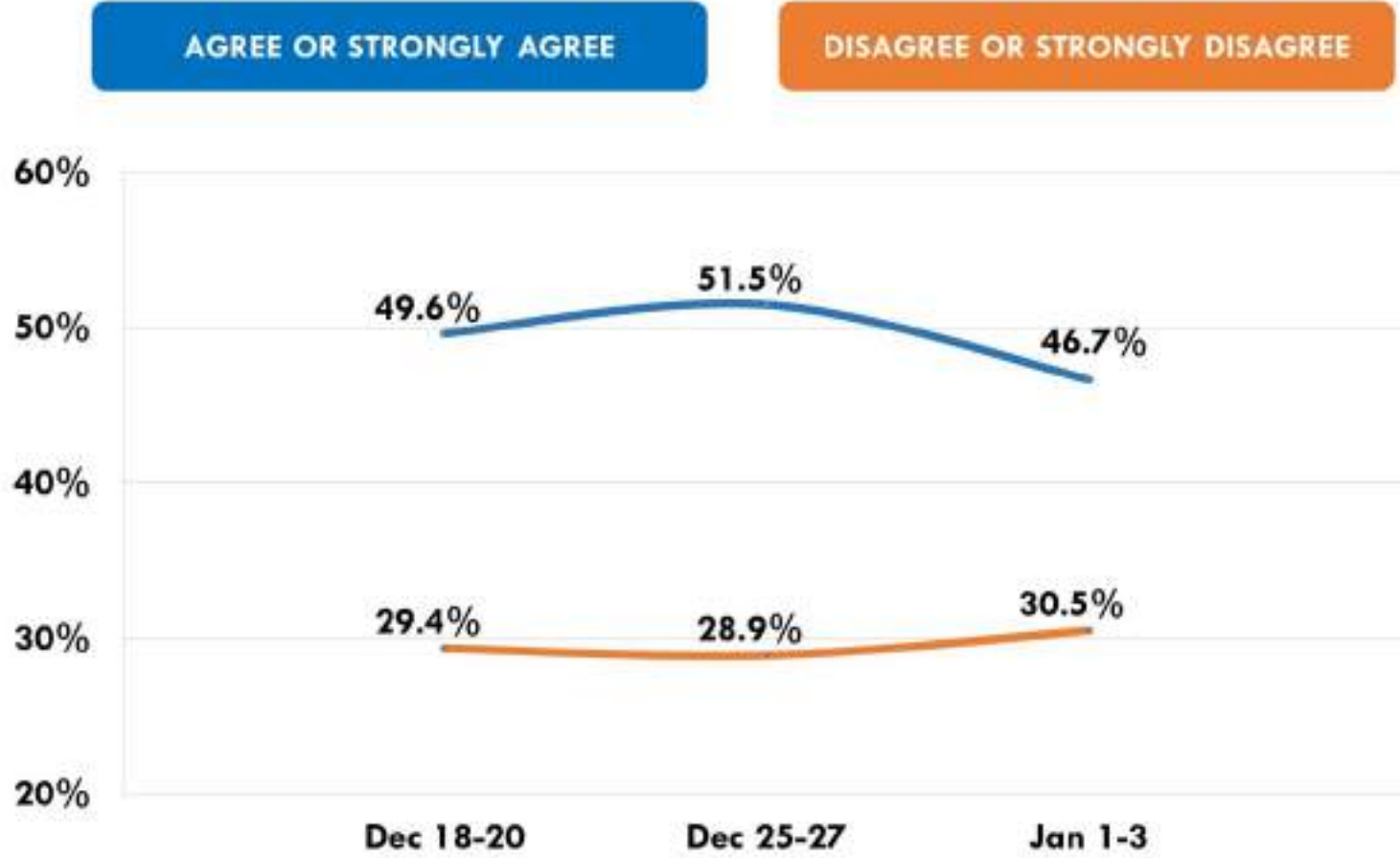
## EXPECTATIONS TO TAKE A COVID-19 VACCINE SEP 11, 2020 – JAN 3, 2021



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

(Base: Waves 27, 30 and 35-43 data. All respondents, 1,205, 1,203, 1,205, 1,206, 1,205, 1,204, 1,206, 1,207 and 1,206 completed surveys.)

## WILL AVOID TRAVEL UNTIL VACCINES ARE WIDELY AVAILABLE DEC 18, 2020 – JAN 3, 2021



**Question:** How much do you agree with the following statement? "I'm not traveling until vaccines are made widely available."

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

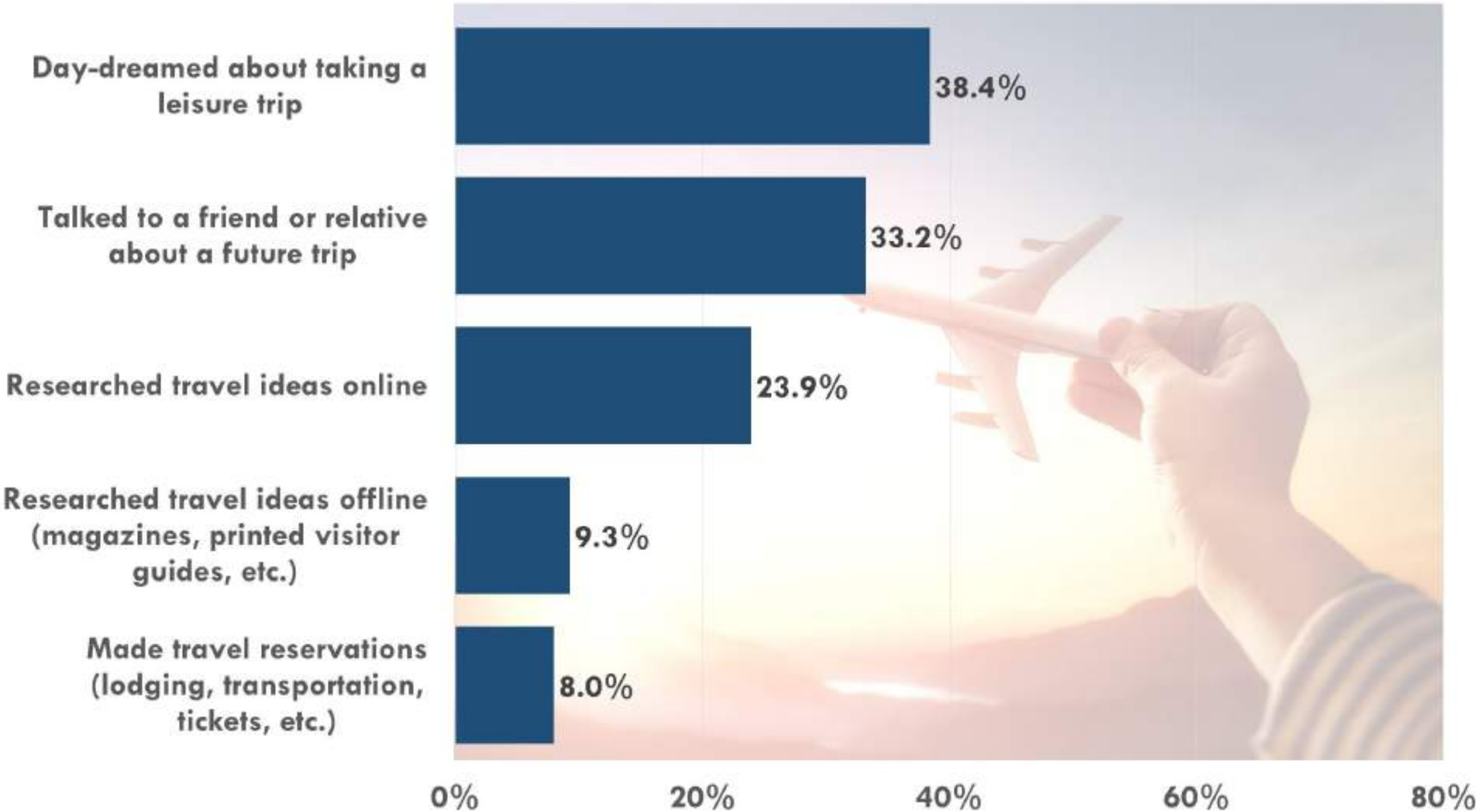


# Travel Planning in the Past Week

When asked this week, nearly 60% of American travelers say they miss traveling “very much,” and they appear to be showing it.

**In fact, 38.4% say they have day-dreamed about taking a trip in the last week and a third have talked to a friend or relative about a future trip. Nearly a quarter of American travelers have researched travel ideas online just in the past week.**

TRAVEL PLANNING IN THE PAST WEEK  
AS OF JANUARY 3<sup>RD</sup>



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

In the past week I have \_\_\_\_\_

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



# How Americans Expect to Travel in 2021

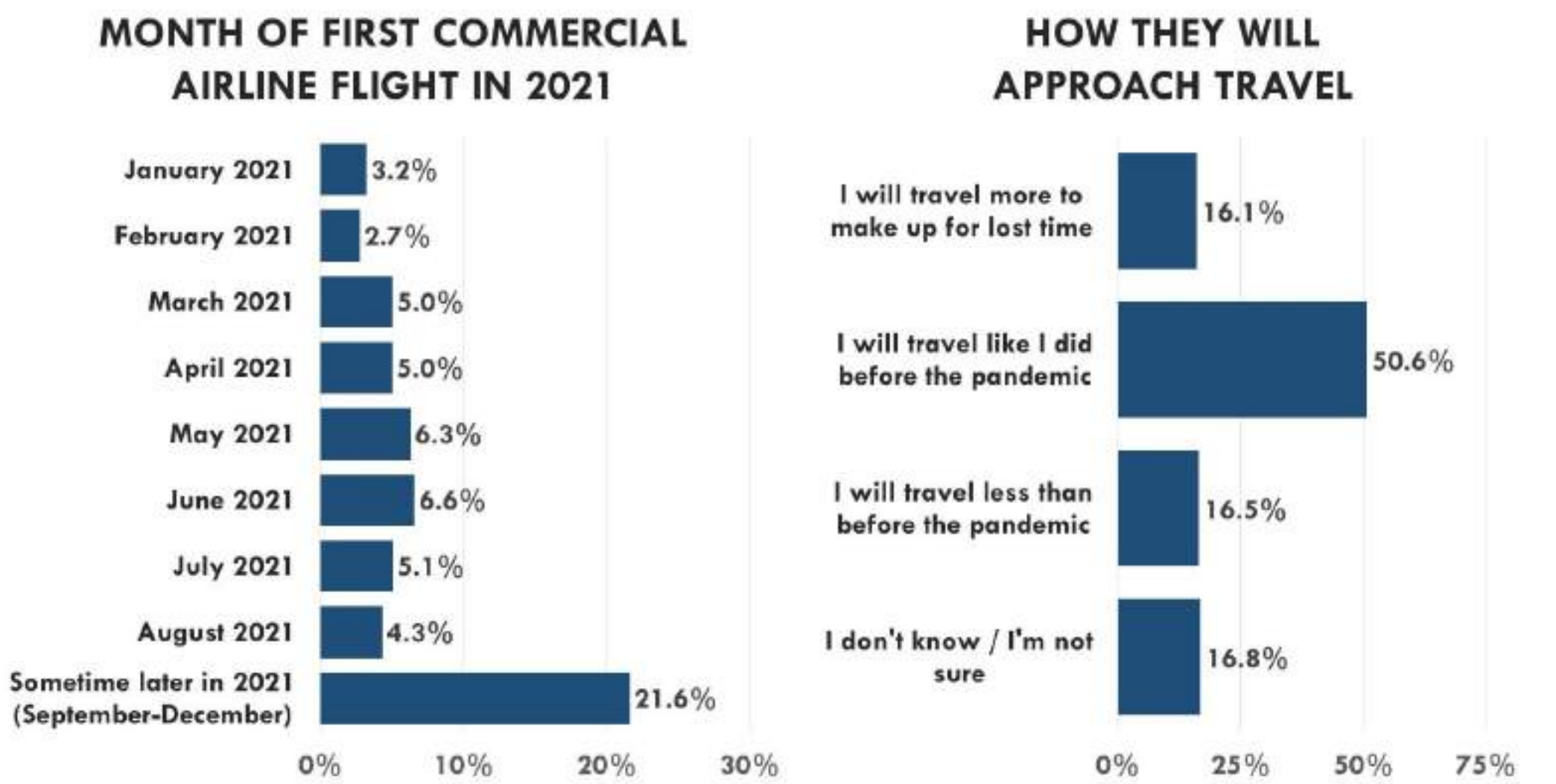
As Americans look out over their travel year in this first week of January, they cautiously see an average of 3.0 leisure trips in 2021. (Note: if this expectation holds true, leisure trips will be down approximately 39% from 2019 levels).

It appears trips will ramp up beginning in May, peak in July, ramp back down in October and bump up again in December. About 18% anticipate their first trip by commercial airline in 2021 will be in the second quarter (April-June). Aspirations to visit Florida, Las Vegas, New York, California, Hawaii and Colorado remain most common.

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

## HOW AMERICANS EXPECT TO TRAVEL IN 2021 AS OF JANUARY 3<sup>RD</sup>

### 3.0 AVERAGE NUMBER OF LEISURE TRIPS



### MOST DESIRED DOMESTIC DESTINATIONS





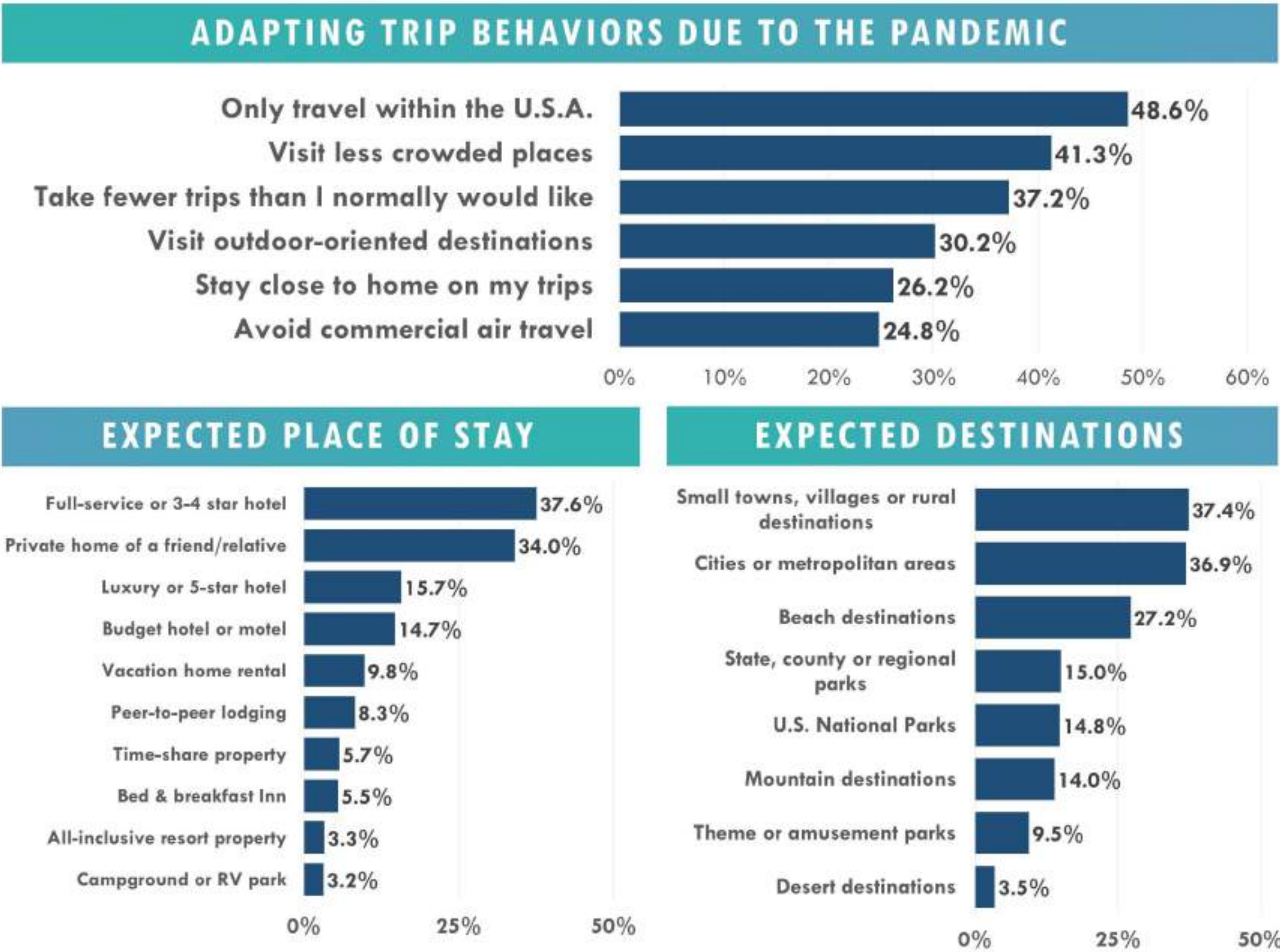
# Travel in the Next 3 Months

For many Americans, making travel dreams reality will likely be for later in the year. We asked Americans about their travel in the next three months. The majority do not plan to travel—37.5% do.

While 84.5% of these trips will indeed be overnight trips, 66.2% will be regional, and over a third of those traveling say they will be staying in the home of a friend or relative rather than paid accommodations. Both cities and small towns and rural areas will most commonly be visited, however the pandemic will still be dictating trip behaviors. 41.3% plan to visit less crowded places and 30.2% plan to visit outdoor-oriented destinations.

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

## TRAVEL IN THE NEXT 3 MONTHS AS OF JANUARY 3<sup>RD</sup>







# Coronavirus Travel Sentiment Index

## Measuring the Potential Influence of Travel Marketing

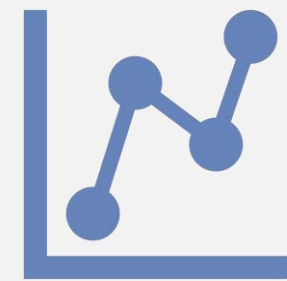
Highlights from the Week of January 4<sup>th</sup>



# What is a Predictive Index?



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



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

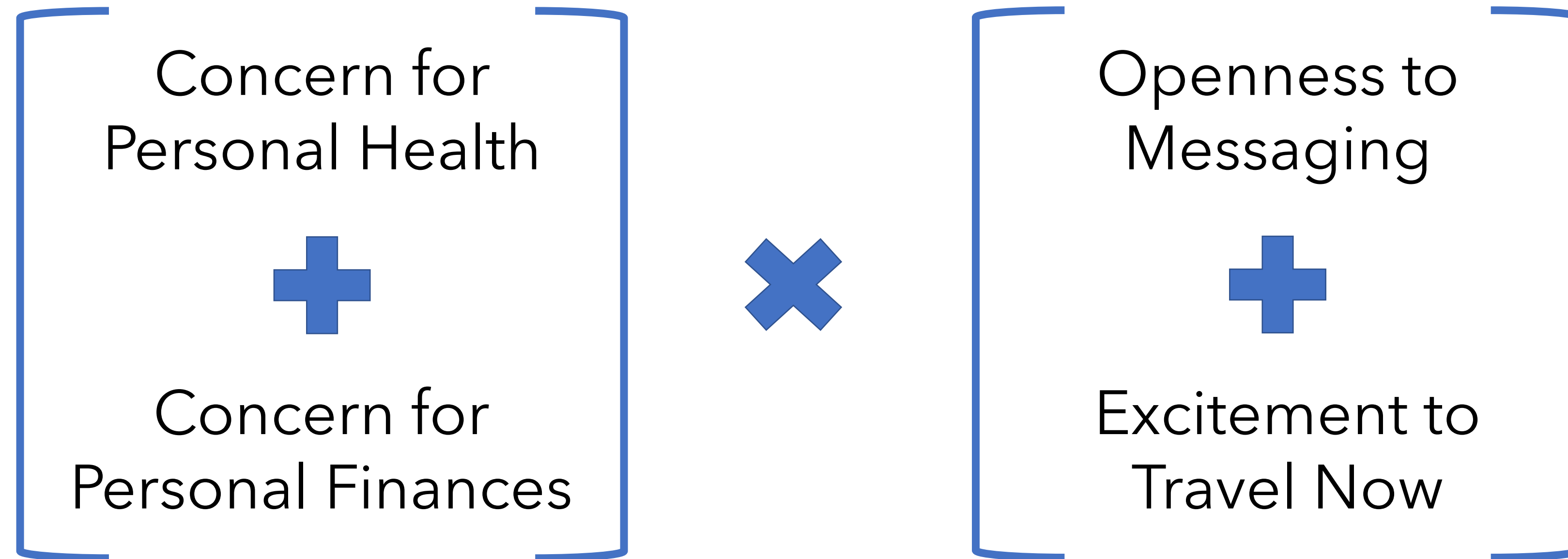


The goals are to identify:

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



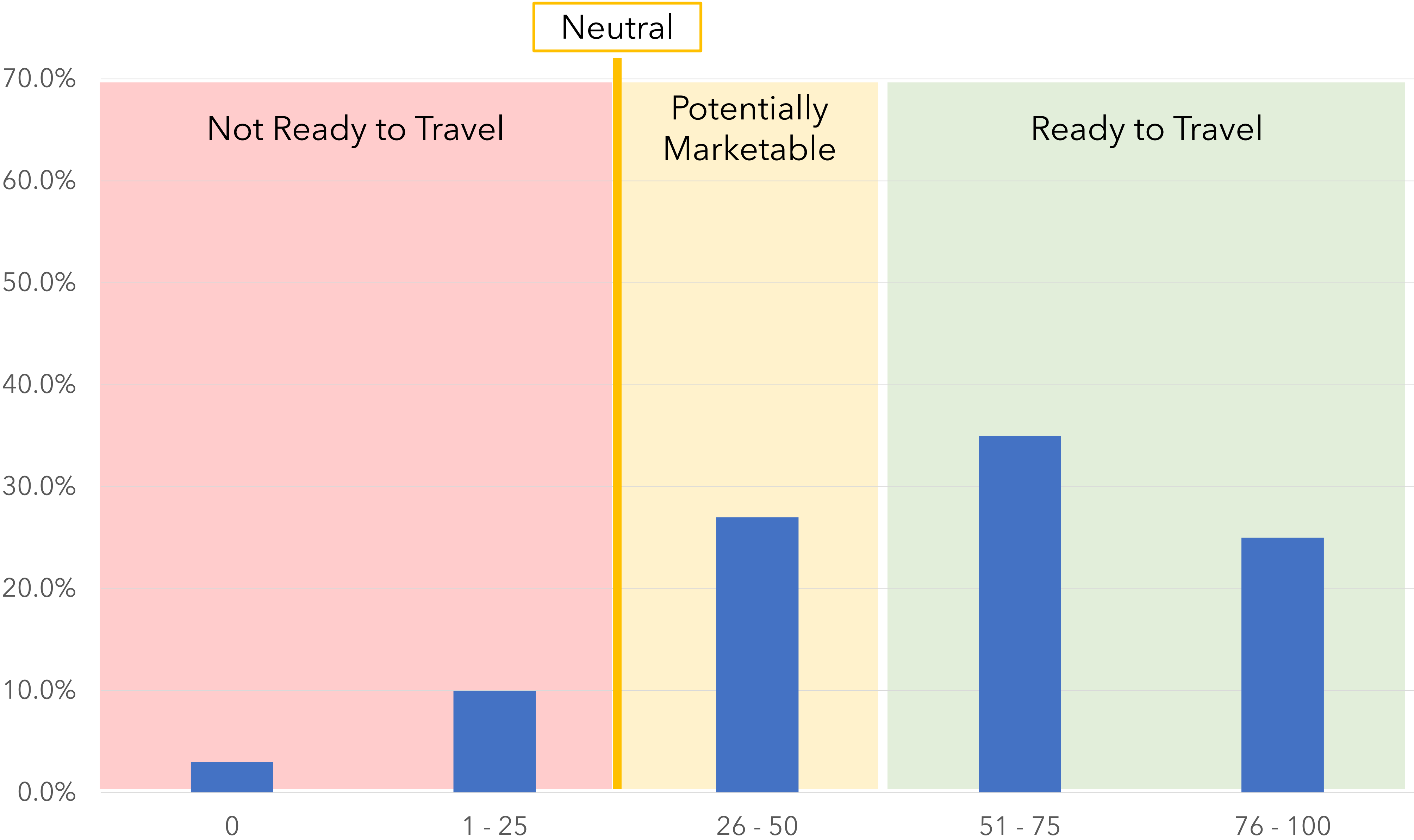
# Predictive Index Formula



\*Normalized to a 100pt scale



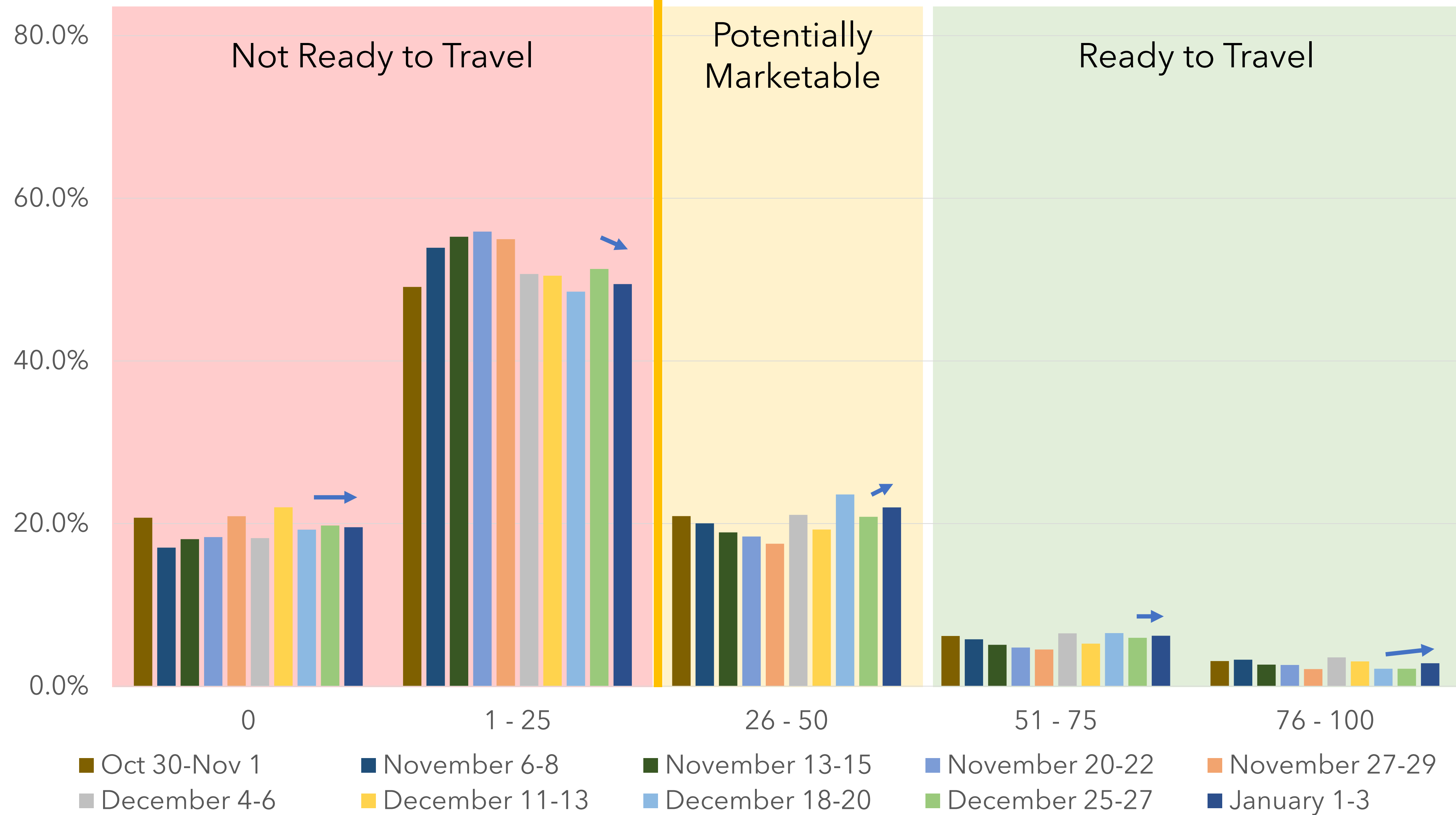
# Healthy Travel Outlook



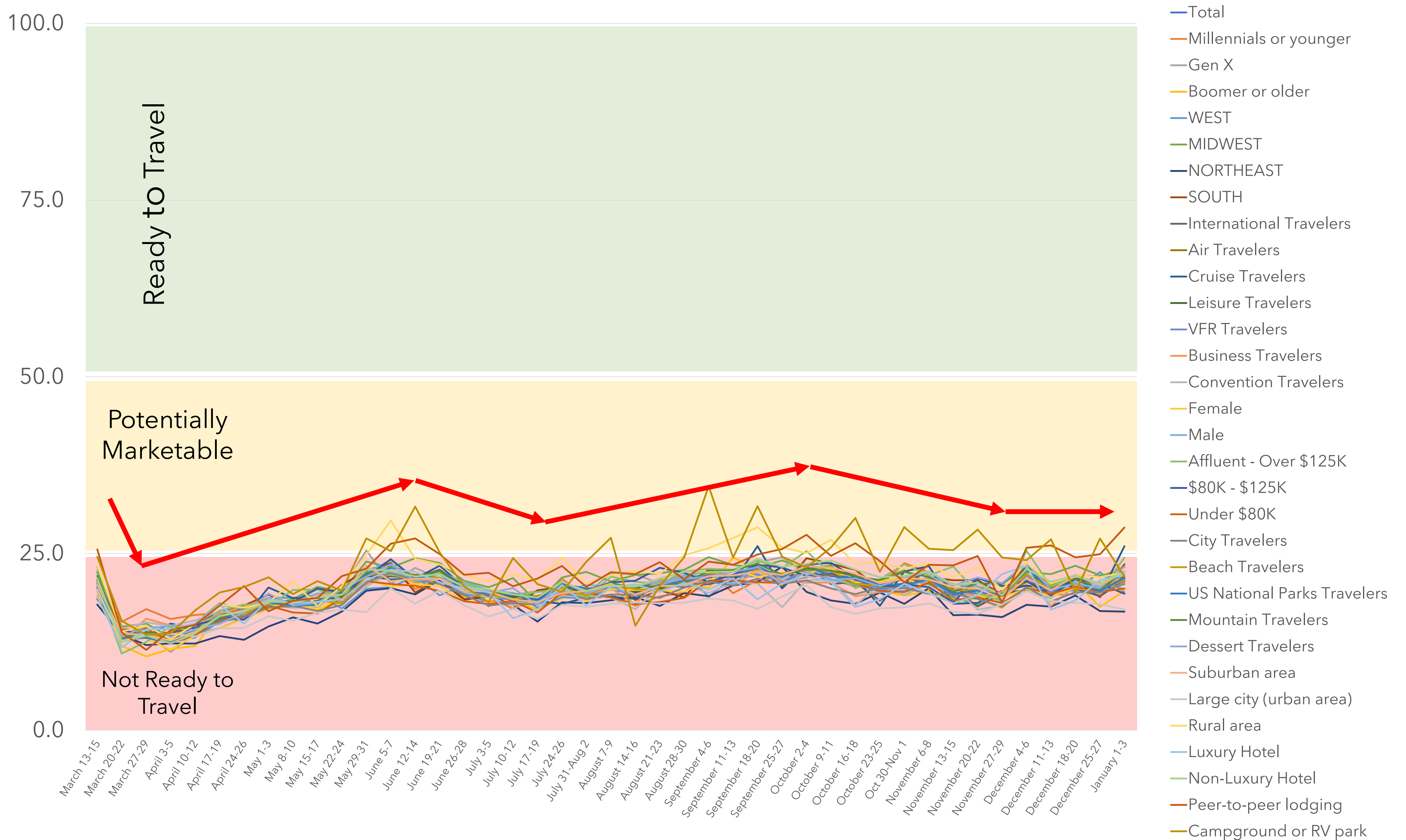


# Travel Outlook

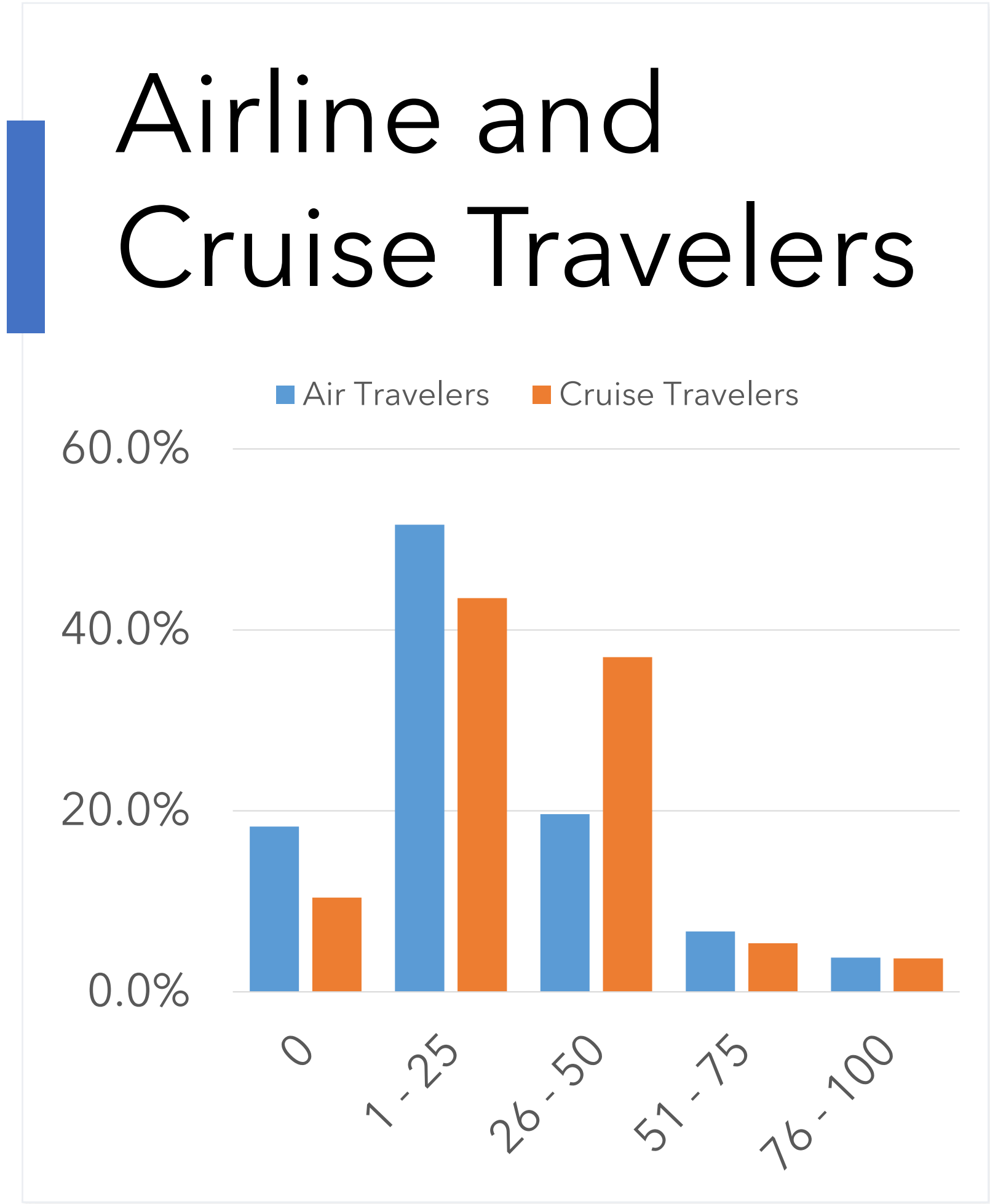
Neutral



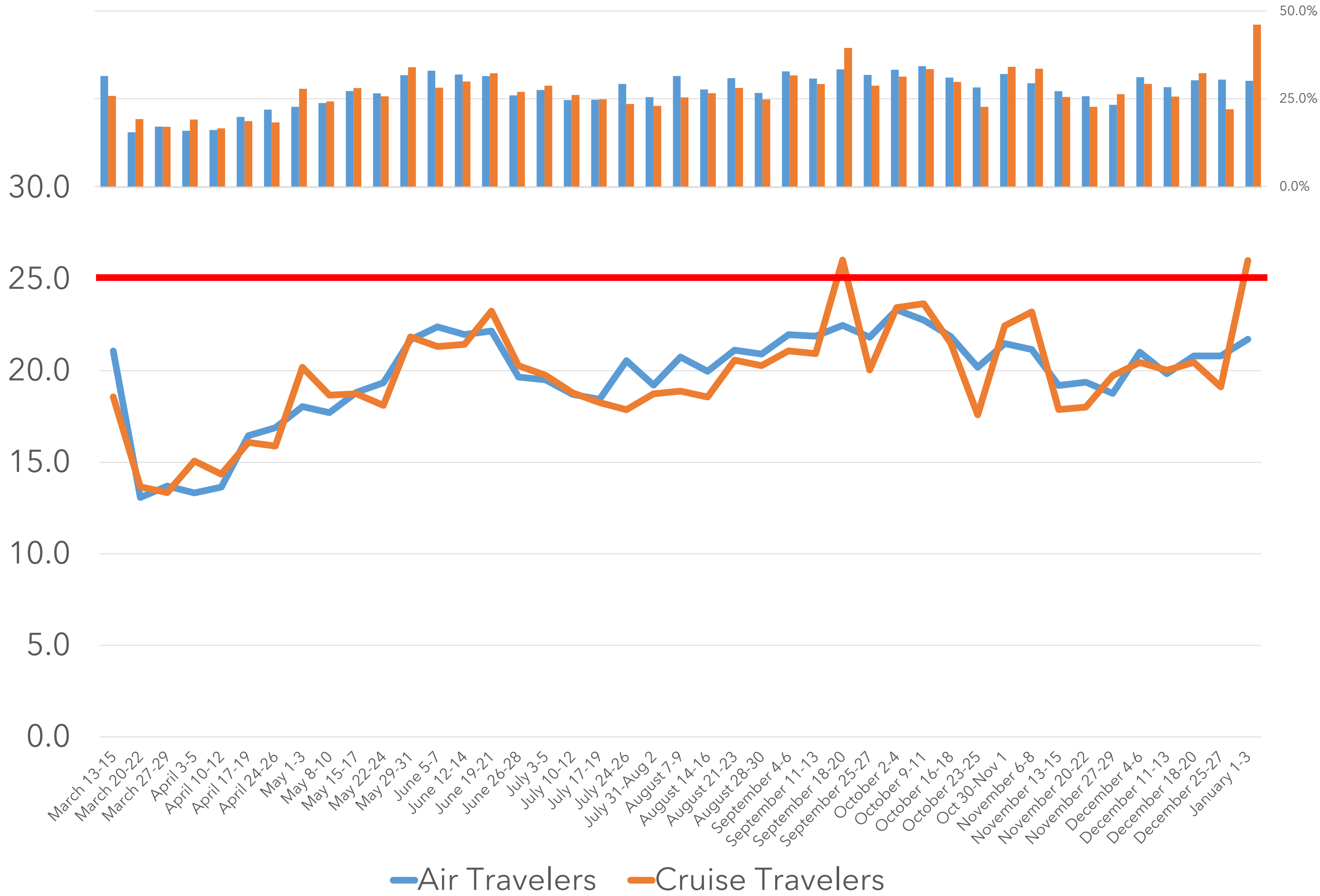






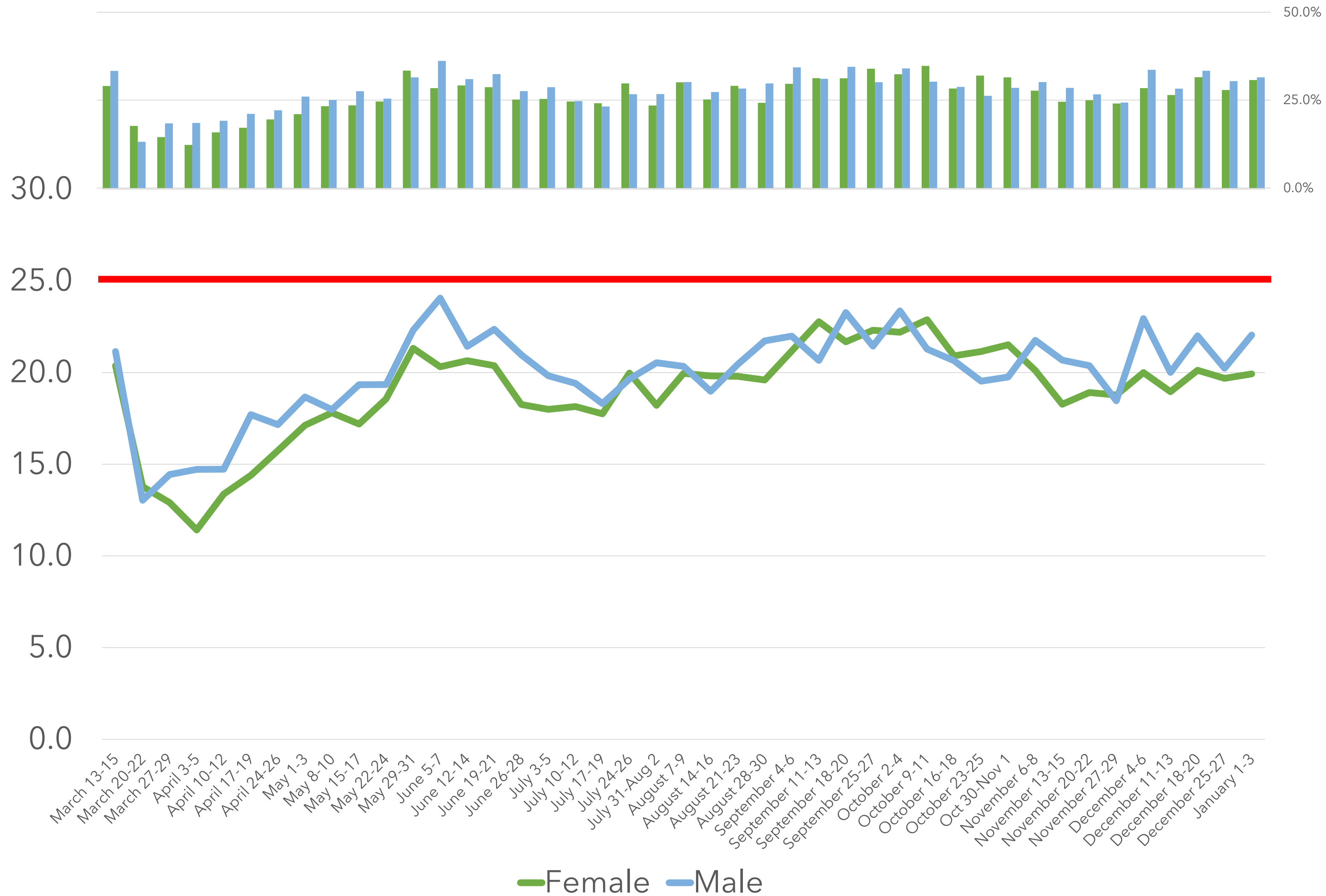


Percent Potentially Marketable  
(Index Above 25)

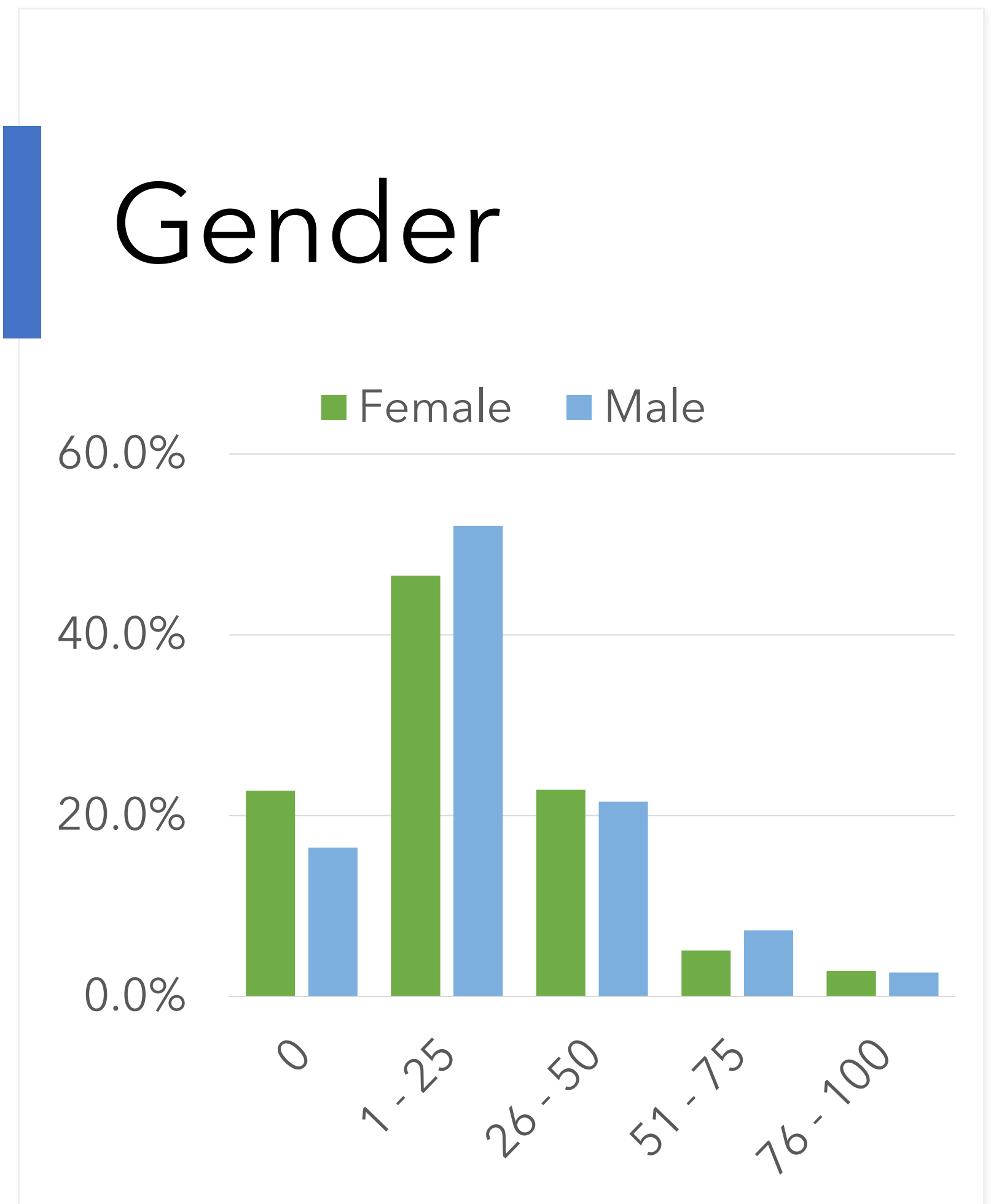




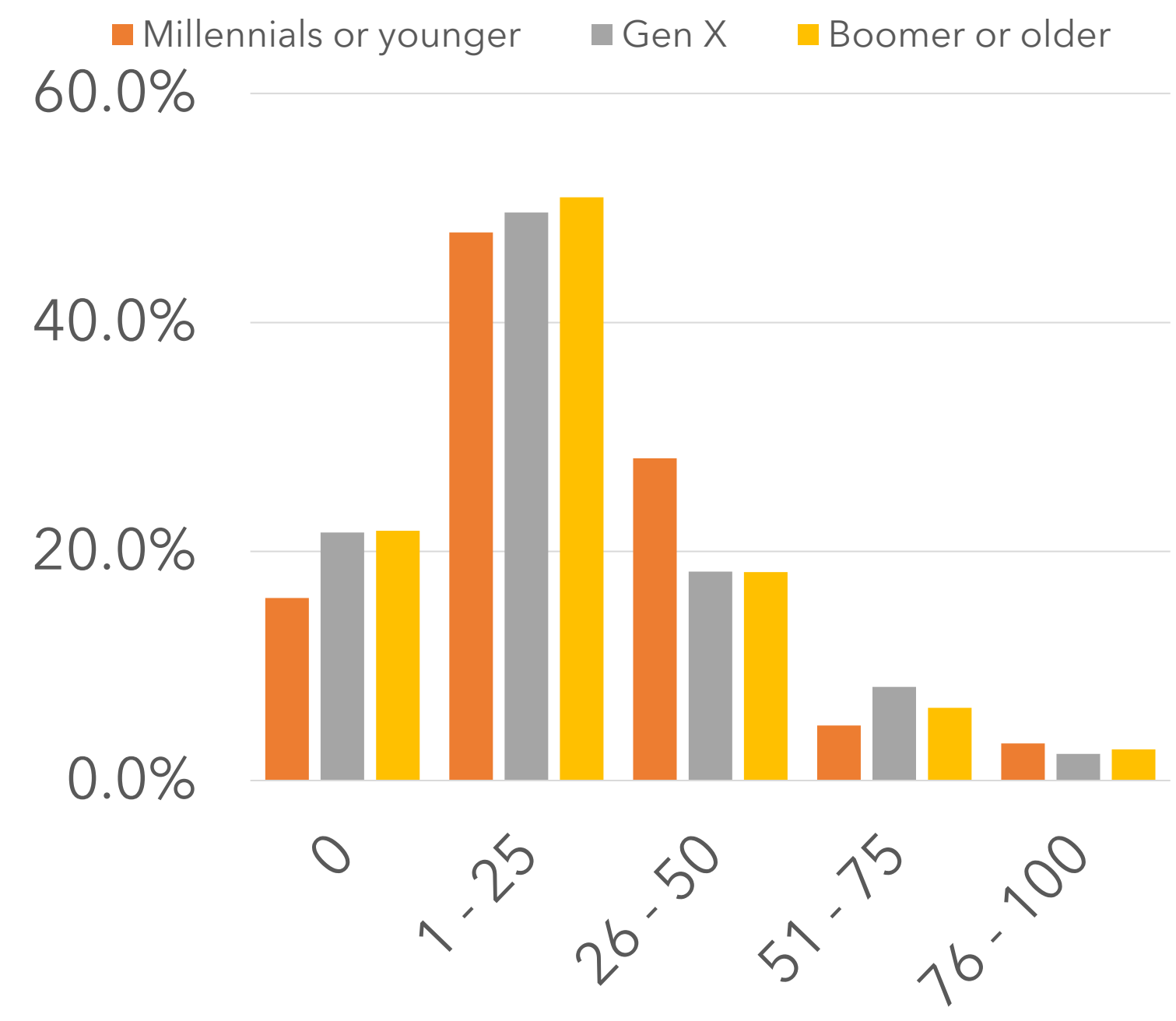
Percent Potentially Marketable  
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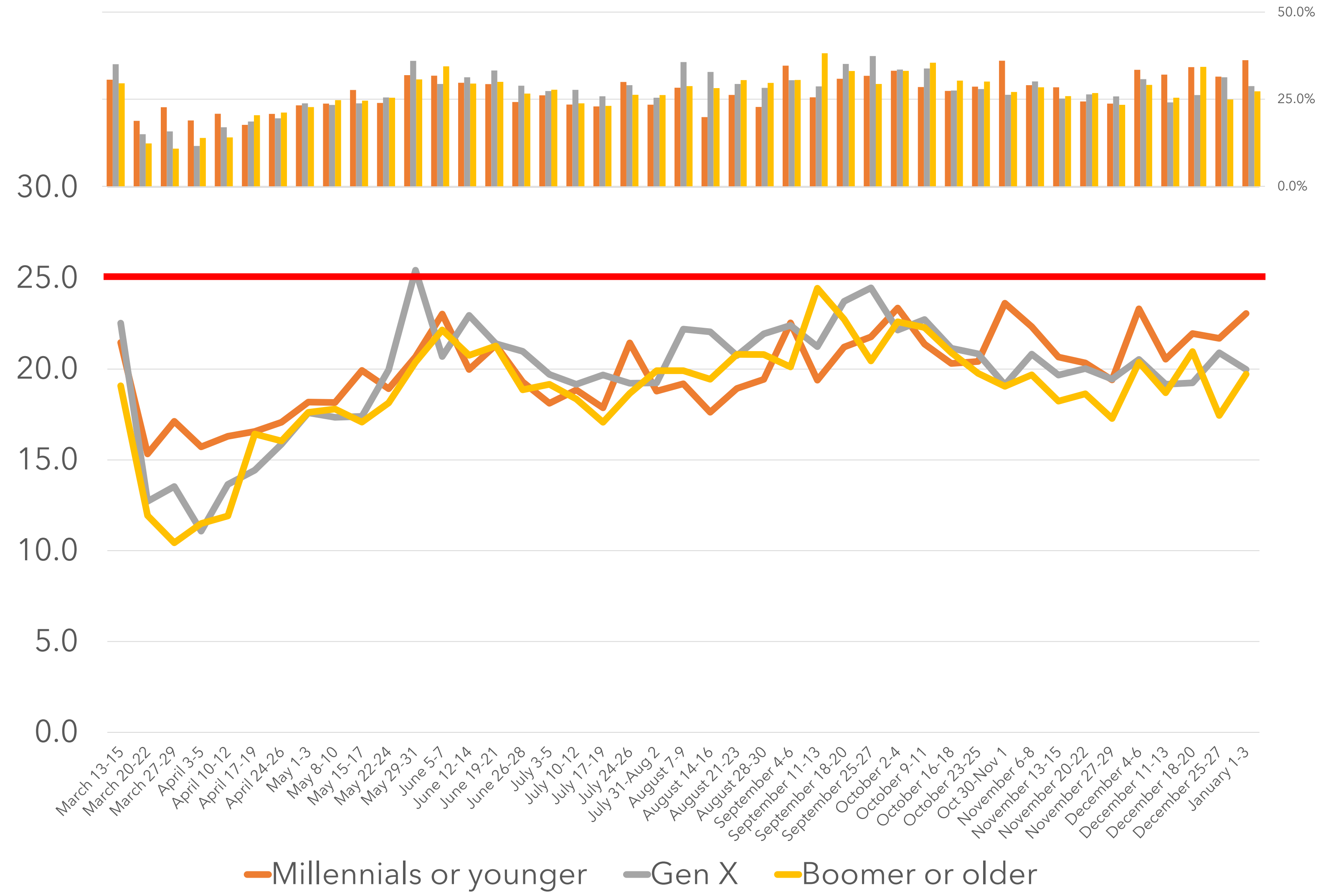
# Gender



# Generation

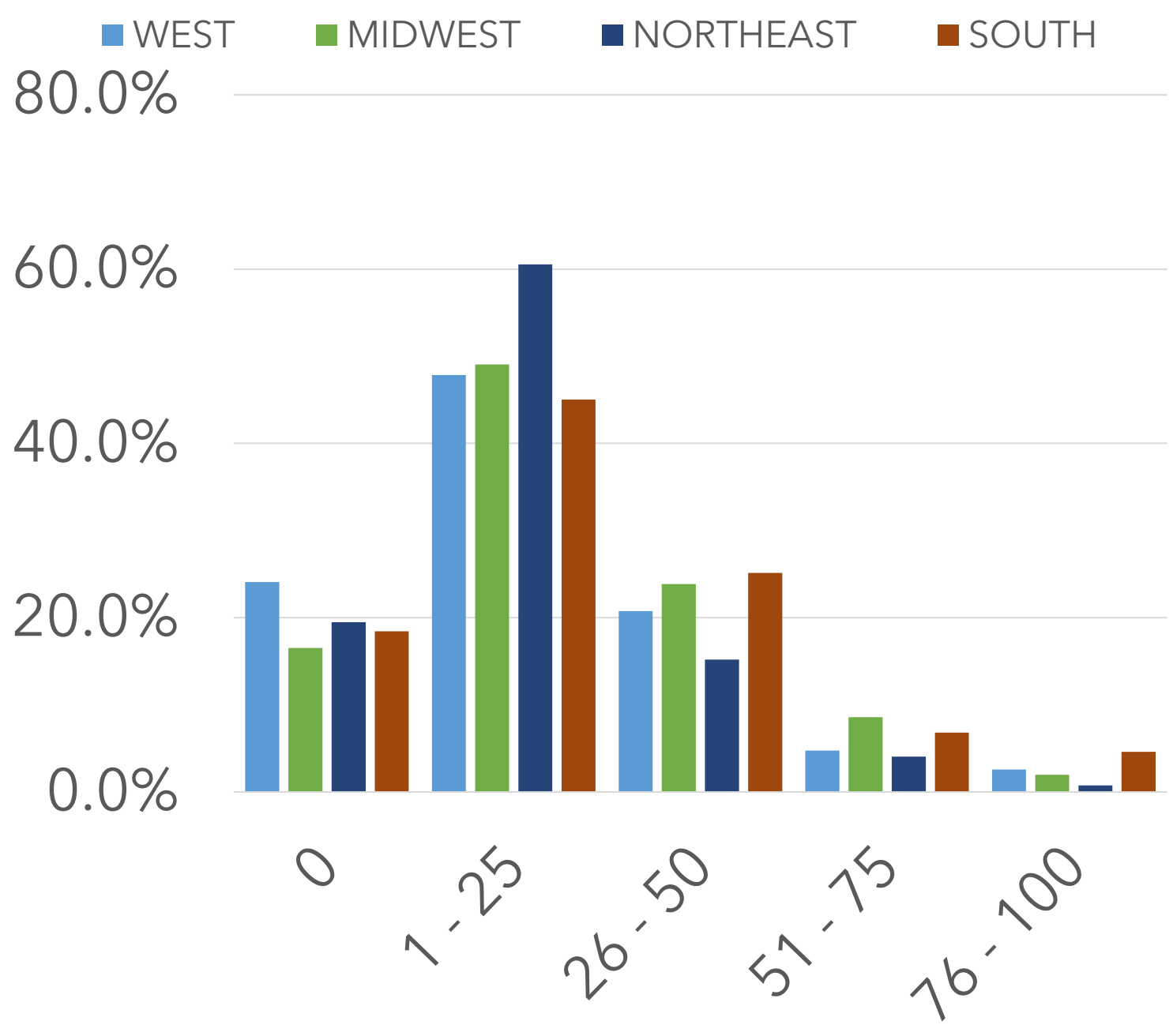


## Percent Potentially Marketable (Index Above 25)

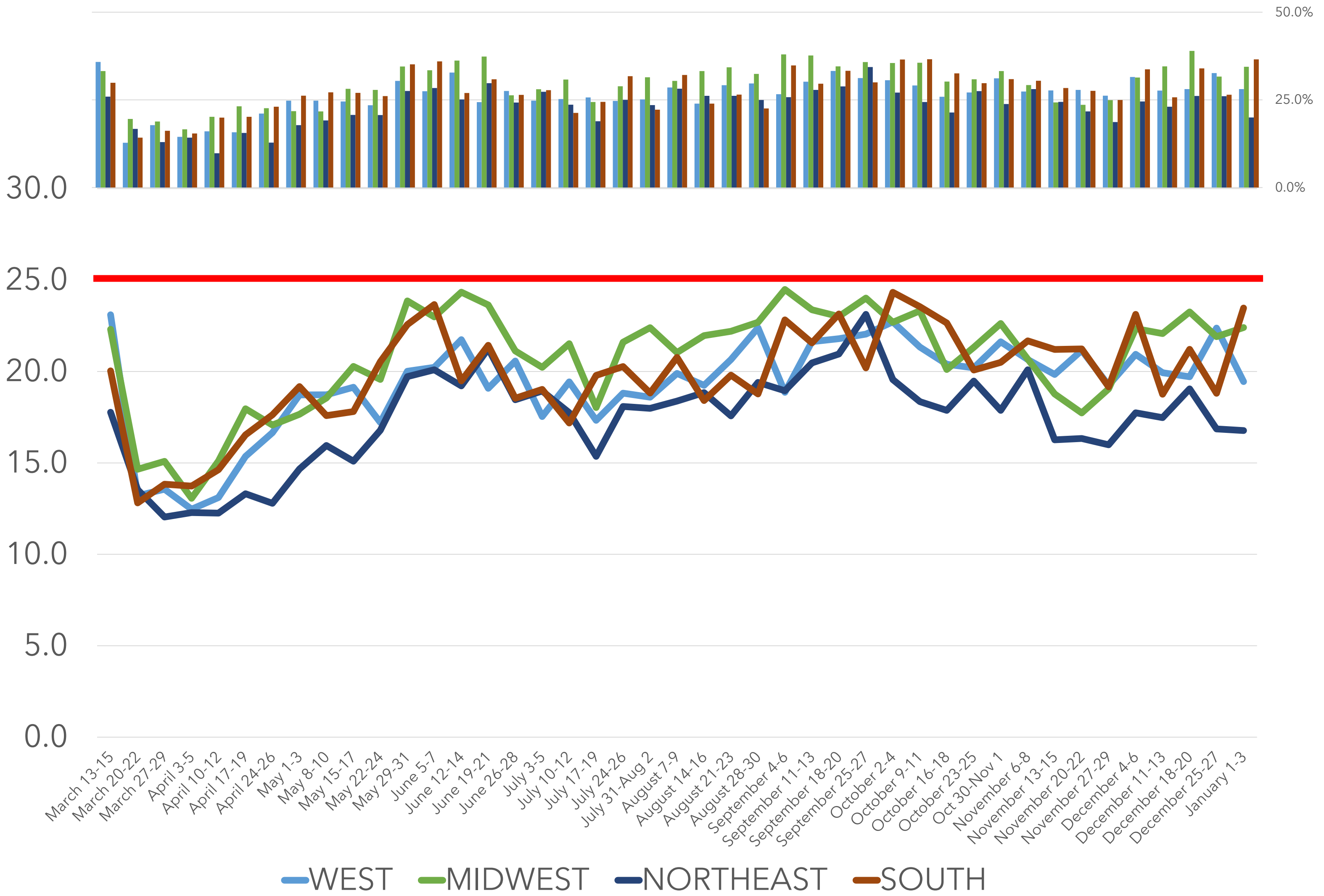




# US Regions

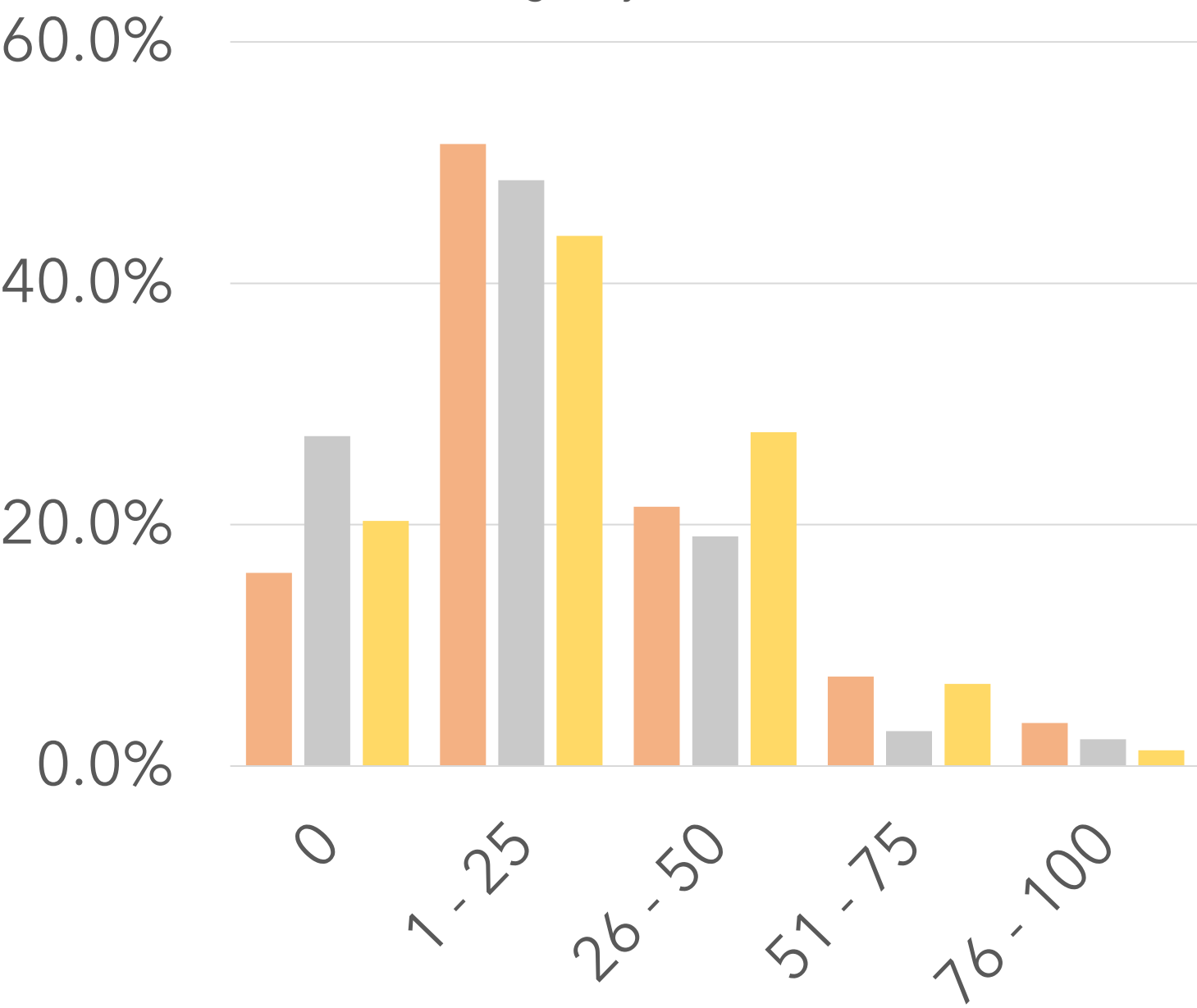


## Percent Potentially Marketable (Index Above 25)

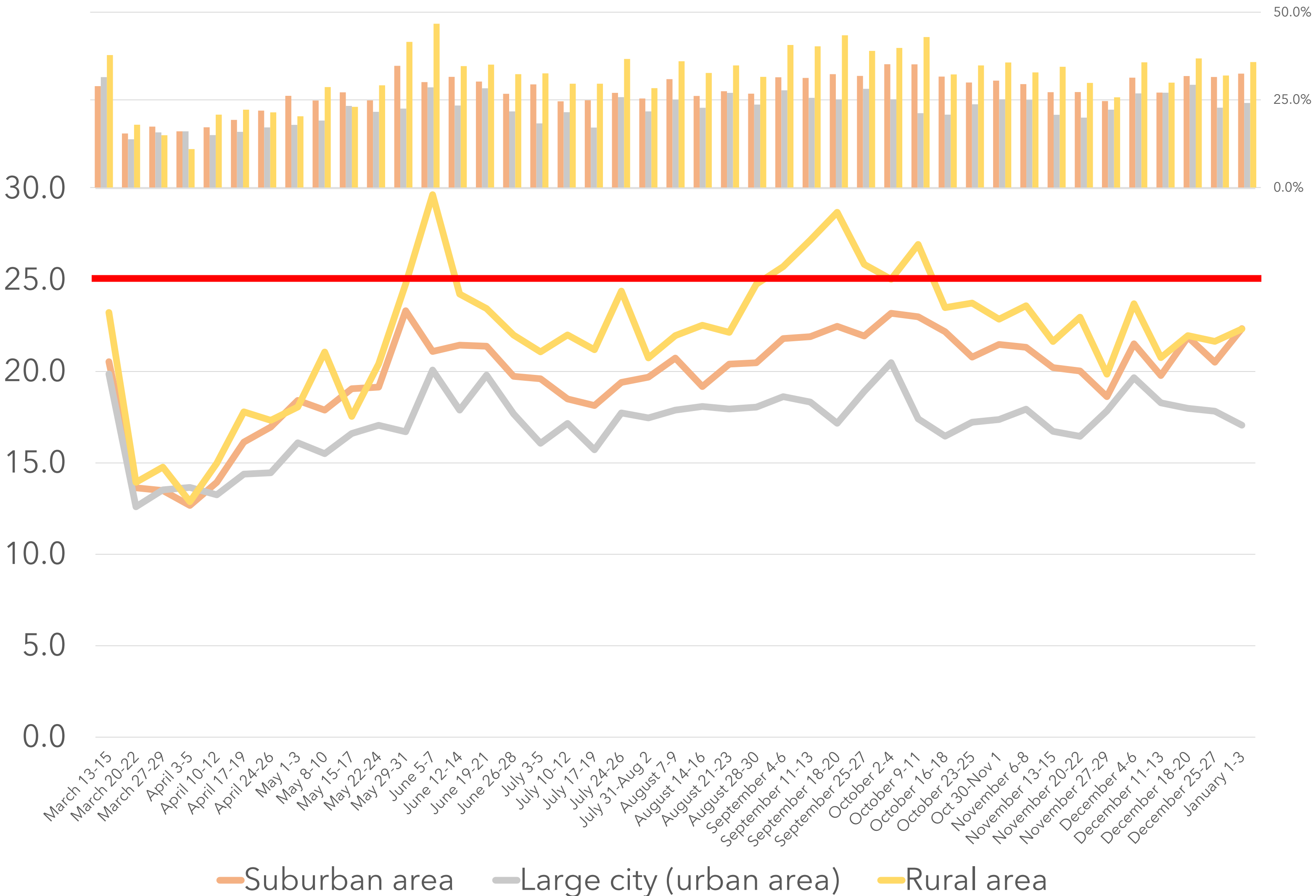


# Residence Type

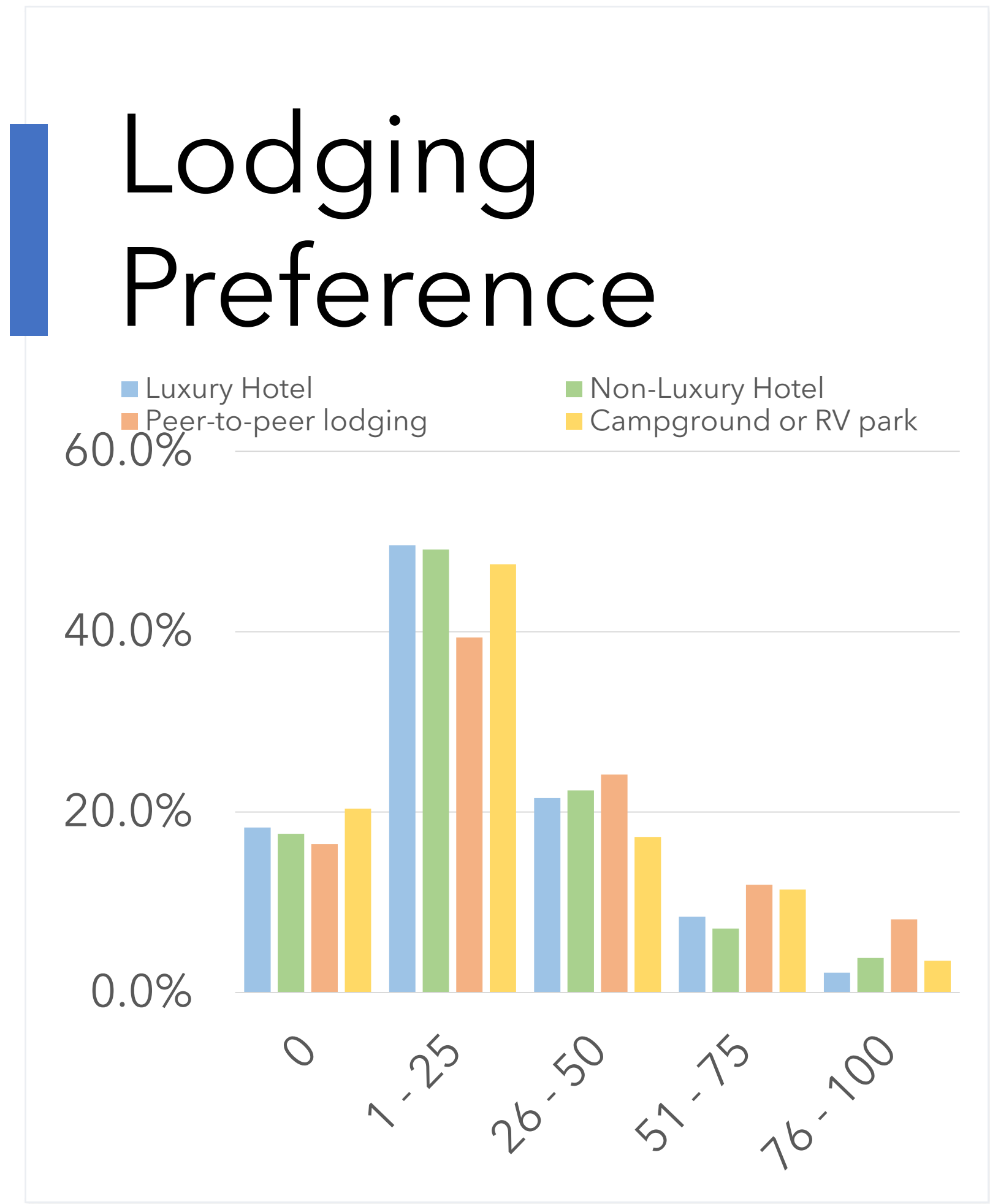
Suburban area Large city (urban area) Rural area



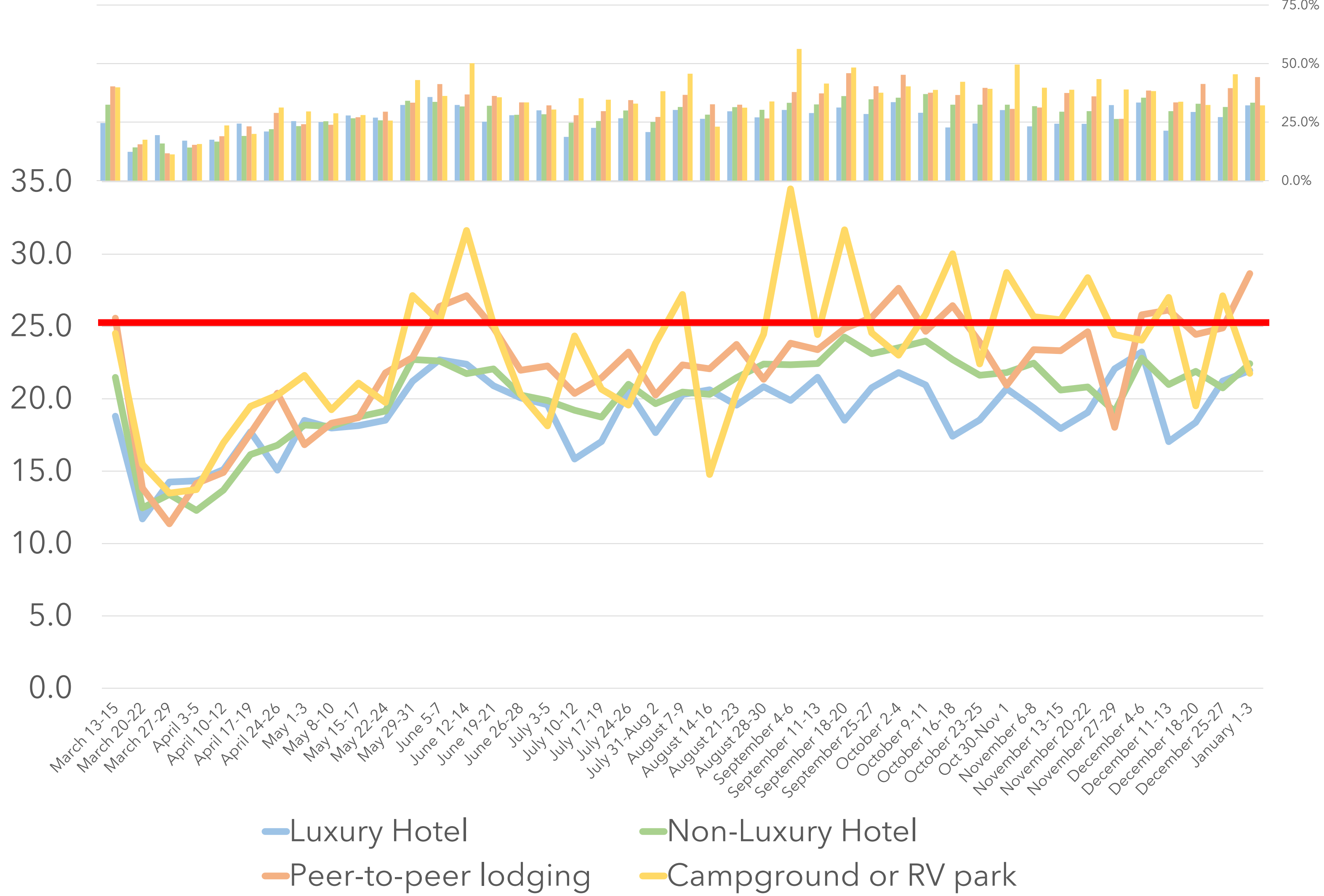
## Percent Potentially Marketable (Index Above 25)







Percent Potentially Marketable  
(Index Above 25)





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



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# A Bright and Happy 2021!

*Thank you for your partnership and friendship throughout the trying year that was 2020. We join you in optimism that 2021 will be much better!*

Destination  Analysts