

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF November 16th, 2020

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.

This week's event will feature a panel of Border Destination DMO professionals who will provide insights into what they're seeing in their destinations right now and what they expect for the future.

**Sign up to attend the webinar on
Tuesday, November 17th at 11:00am ET
[here.](#)**



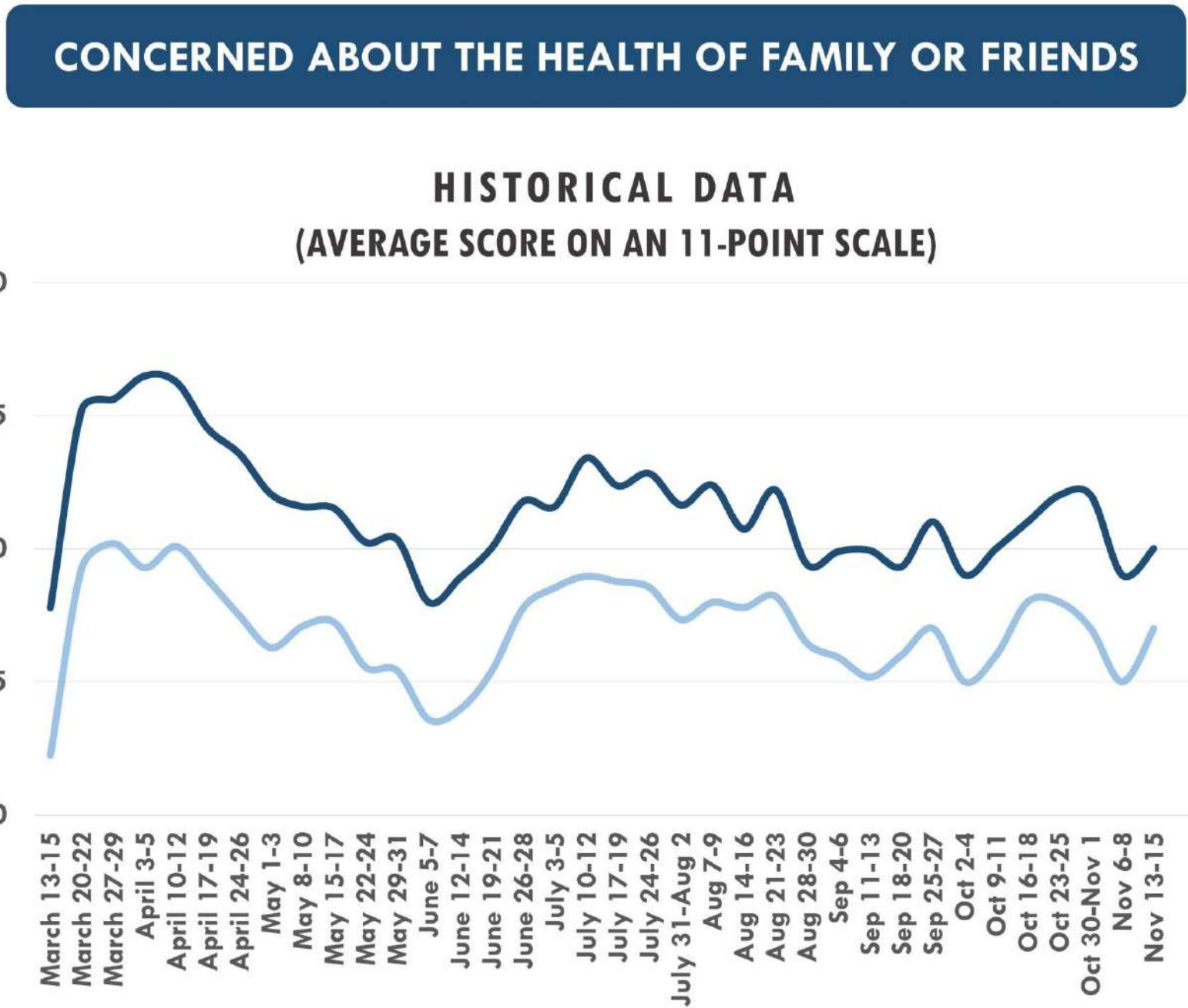
Key Findings for the Week of November 16th

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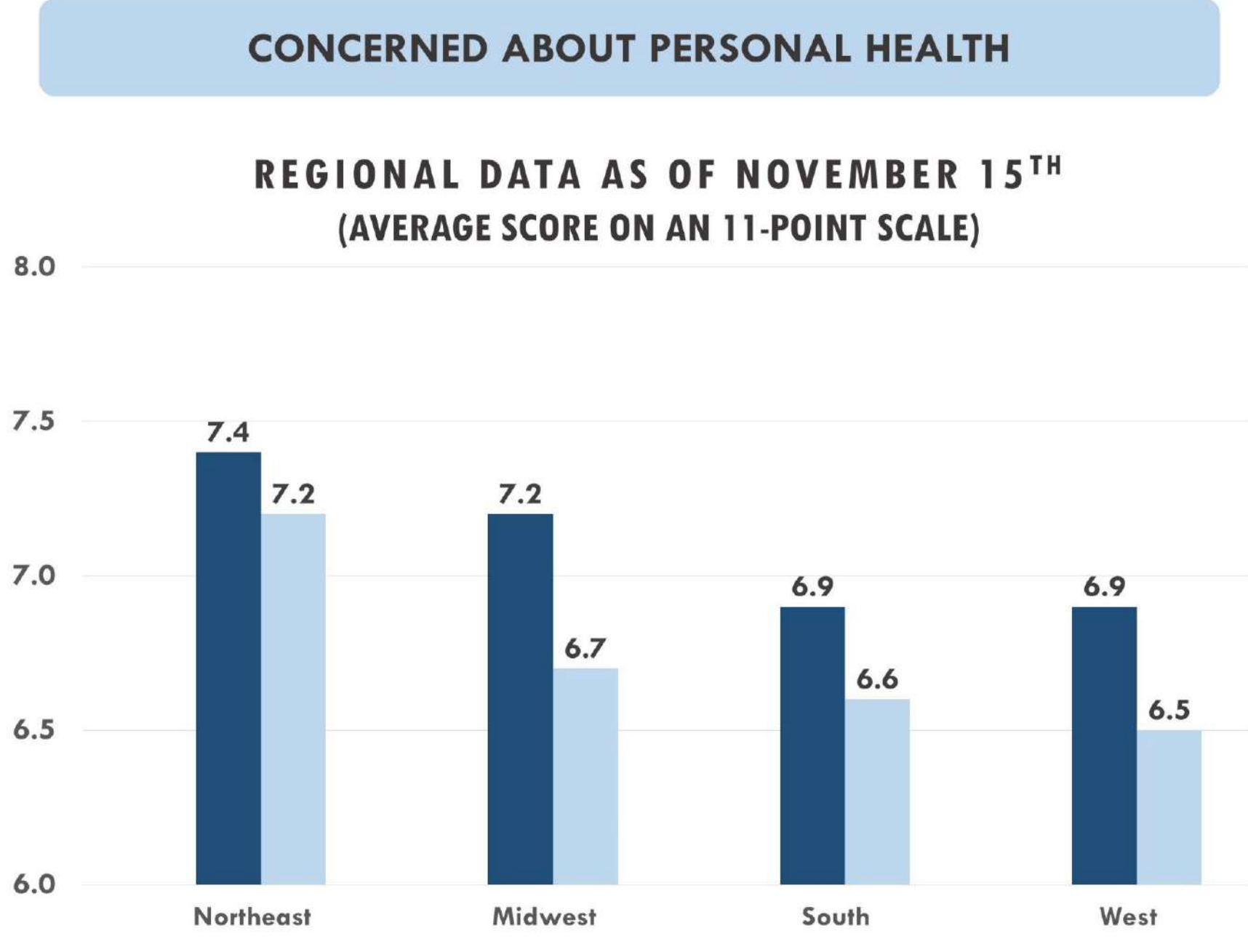
Concern Levels About Contracting COVID-19

As daily cases exceeded 180,000 in the last few days, Americans' concerns about contracting COVID-19 rose right alongside. Americans are especially concerned about their family and friends getting the virus. Those in the Northeastern region of the country continue to express the strongest concerns about this, now followed by those in the Midwest. Americans are back to where they were in July in their pessimism—60.7% believes the pandemic will be getting worse in the next month; only 14.3% feels it will get better.

CONCERN LEVELS ABOUT CONTRACTING COVID-19 AS OF NOVEMBER 15TH



(Base: Waves 1-36. 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 and 1,206 completed surveys.)



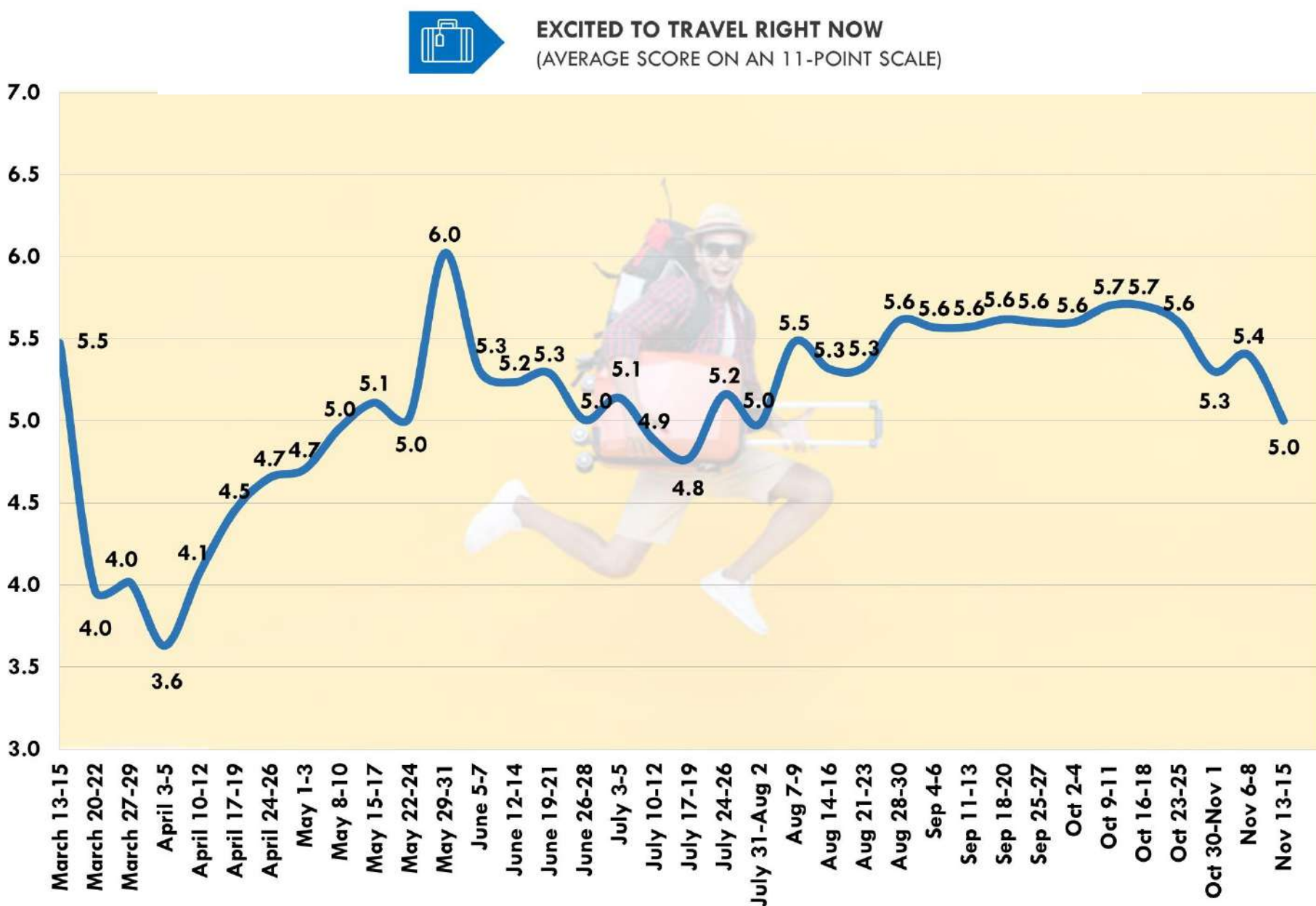
(Base: Waves 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your **FRIENDS OR FAMILY** contracting the virus?
Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus?

Effects of Recent Coronavirus Surges

The trajectory of the pandemic continues to depress how Americans feel about travel for the near-term. Those with high excitement levels for taking a potential getaway in the next month plummeted over 7 percentage points since last week, and openness to travel inspiration also declined to the lowest level it has been since August 9th. The percent that agree they have lost their interest in travel for the time being increased to 46.2% from 43.1% in the last week. About 60% of American travelers say they wouldn't be able to fully enjoy travel, and nearly 47% say they would feel guilty traveling right now.

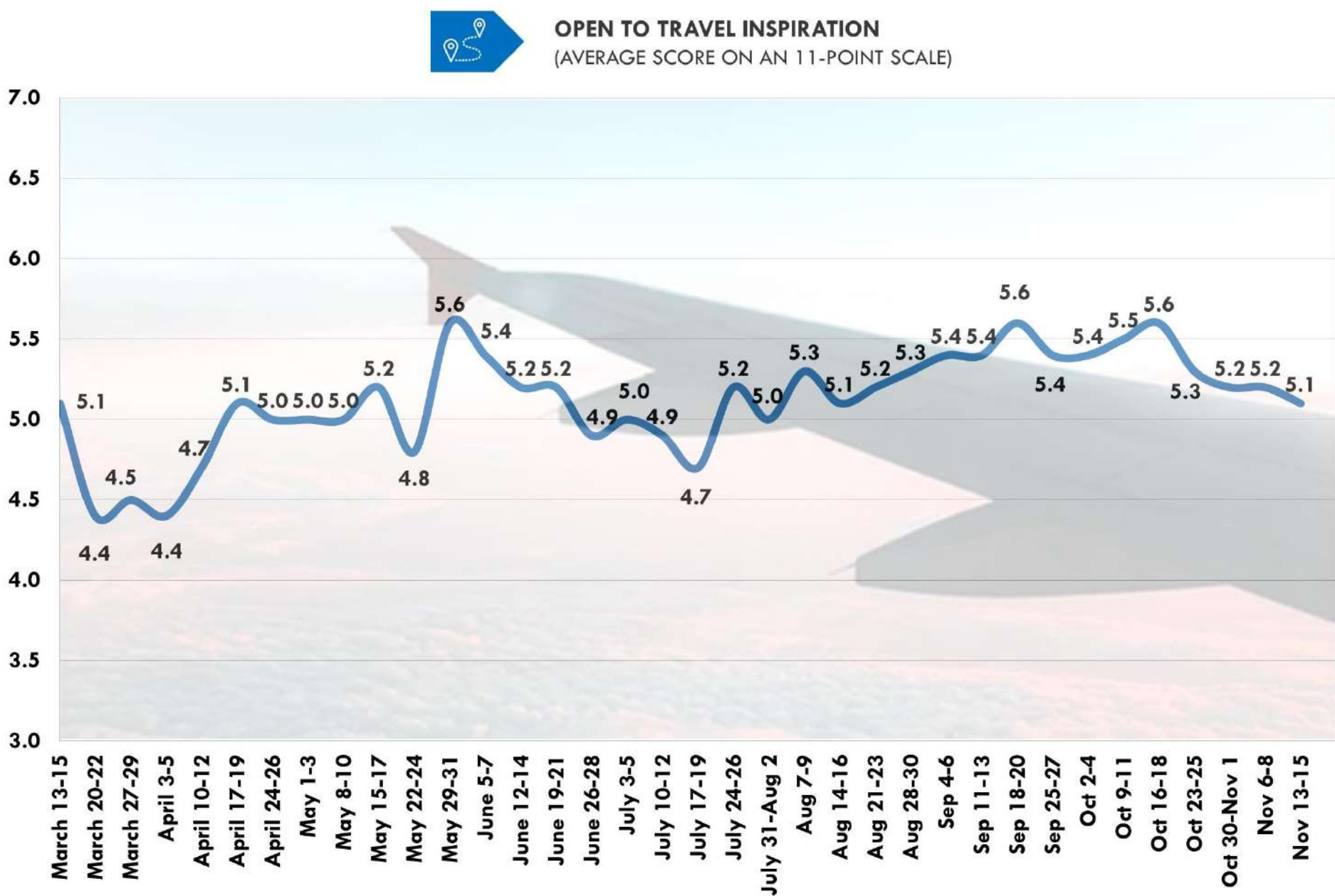
EXCITEMENT TO TRAVEL RIGHT NOW
MARCH 13 – NOVEMBER 15



Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

(Base: Waves 1-36. 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 and 1,206 completed surveys.)

OPENNESS TO TRAVEL INSPIRATION
MARCH 13 – NOVEMBER 15



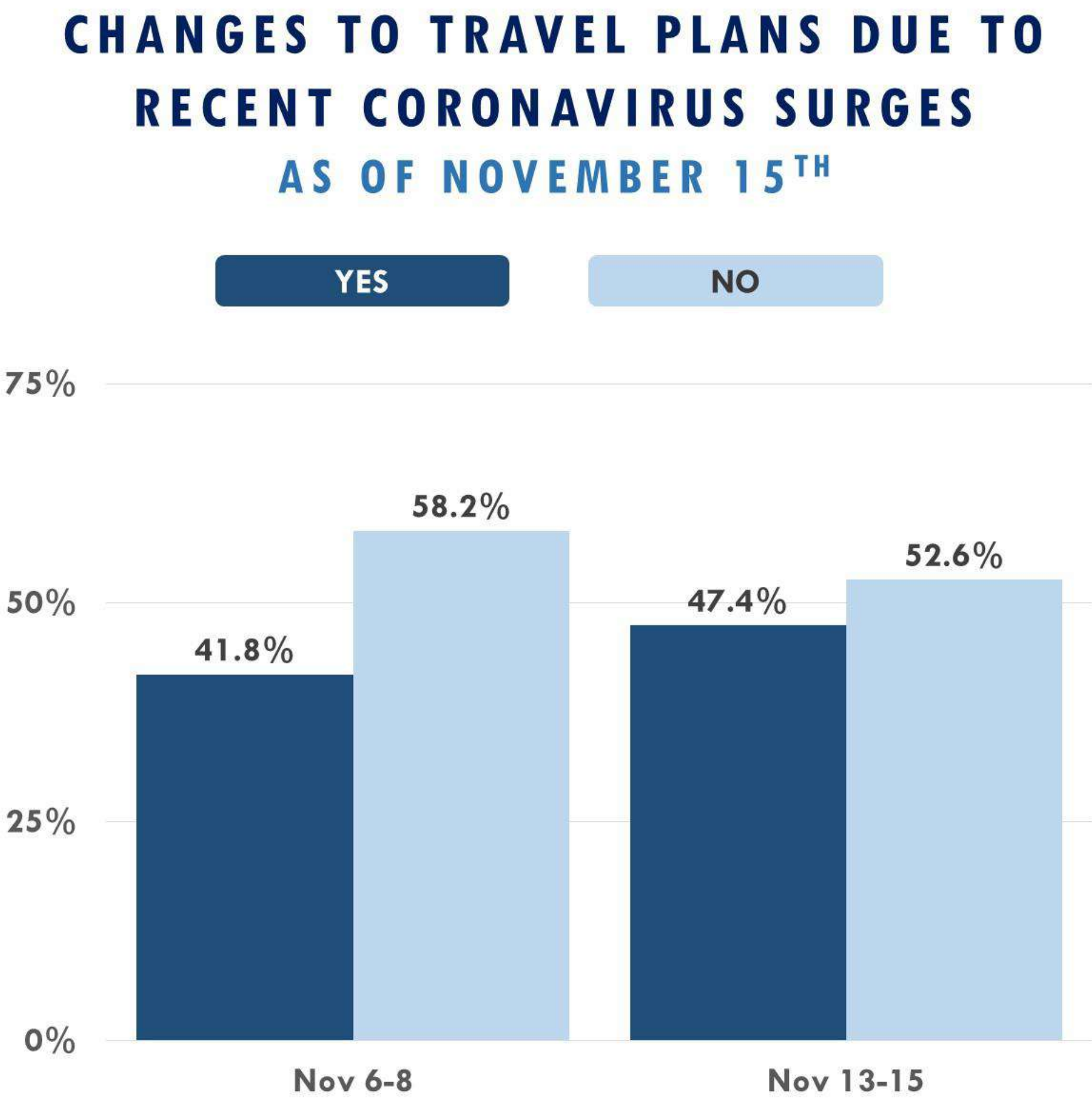
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Waves 1-36. 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 and 1,206 completed surveys.)

Changes to Travel Plans Due to Recent Coronavirus Surges

This latest surge in COVID-19 cases has resulted in actual trip cancellations, as well as the loss of trips that may have come to fruition if the pandemic was on a better course.

The proportion of American travelers that said they cancelled or postponed a trip because of the increasing cases has jumped to 47.4% from 41.8% in a week. Now 62.8% (up from 60.2%) express that what's happening with the pandemic has made them less likely to travel in the next 3 months.



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

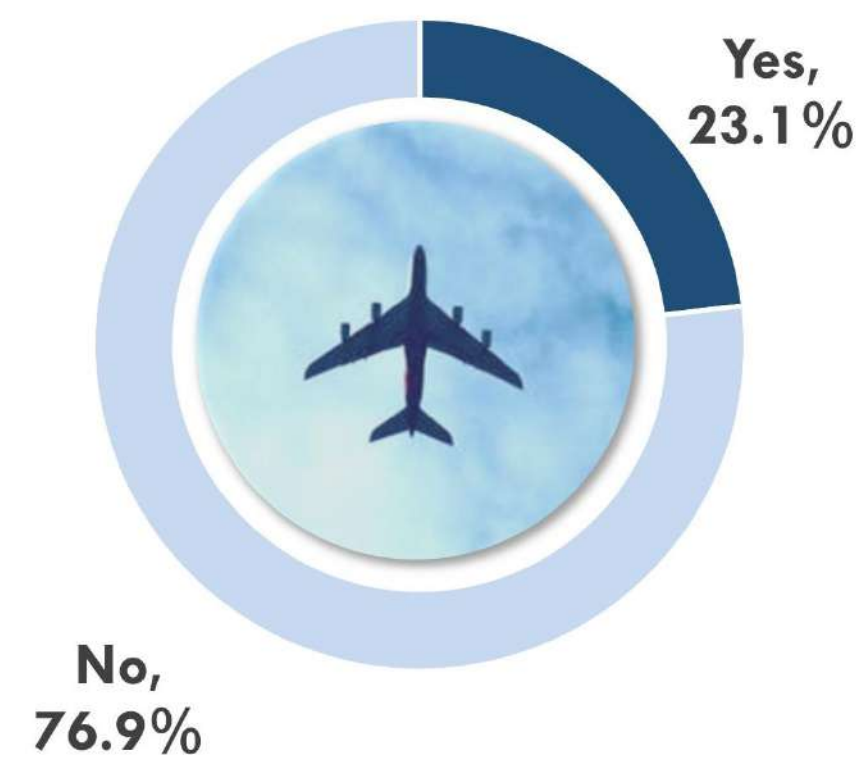
(Base: Waves 35-36 data. All respondents, 1,205 and 1,206 completed surveys.)

Travel During the Pandemic

While feelings about travel in the short-term may be depressed, there continue to be positive indicators for travel’s future. American travelers’ concerns about the pandemic’s impact on their personal finances is at one of the lowest levels it has been during the pandemic (54.8% have elevated concerns). The perception of travel and leisure activities as unsafe has not gone back up to peak levels recorded in July and April. Travel also continues to happen. **In total, 23.1 % of American travelers have taken a trip by air during the pandemic and 58.1 % have taken a road trip. Nearly three-in-ten say they plan to take a holiday season-related trip.** In addition, nearly 80% have at least tentative trip plans for some time in the next year, although over a third are eyeing May 2021 or later. Americans’ travel state-of-mind remained steadfast, with 57.1% expressing readiness versus hesitation.

TRAVEL DURING THE PANDEMIC AS OF NOVEMBER 15TH

AMERICANS WHO HAVE TRAVELED BY AIR



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

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

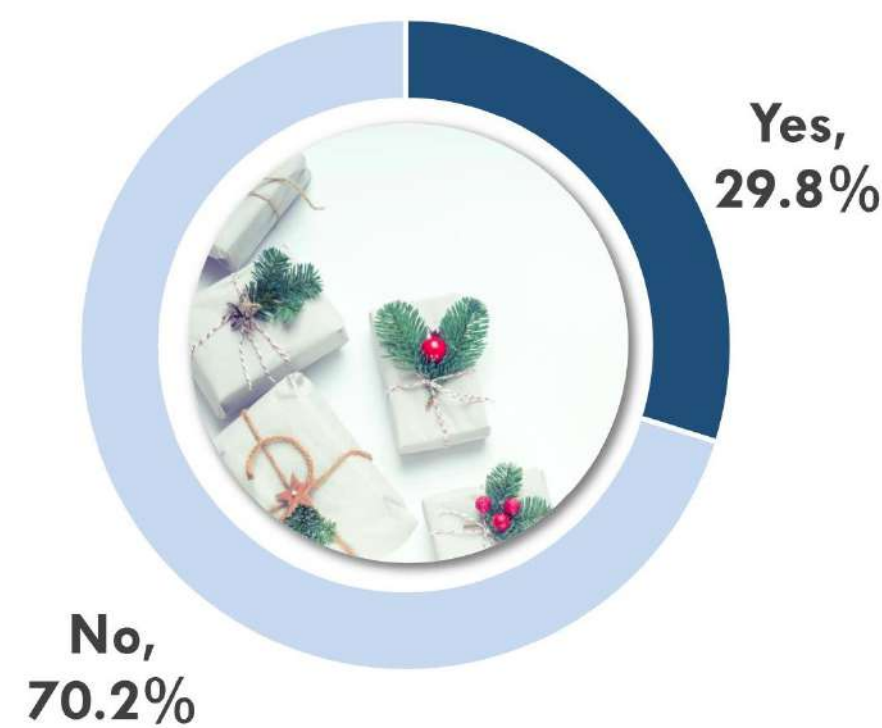
AMERICANS WHO HAVE TAKEN A ROAD TRIP



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

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

AMERICANS WHO HAVE HOLIDAY TRAVEL PLANS



Question: Do you have any travel plans (even tentative) or the holiday season this year?

(Base: Wave 36 data. All respondents, 1,206 completed surveys. Data collected Nov 13-15, 2020)

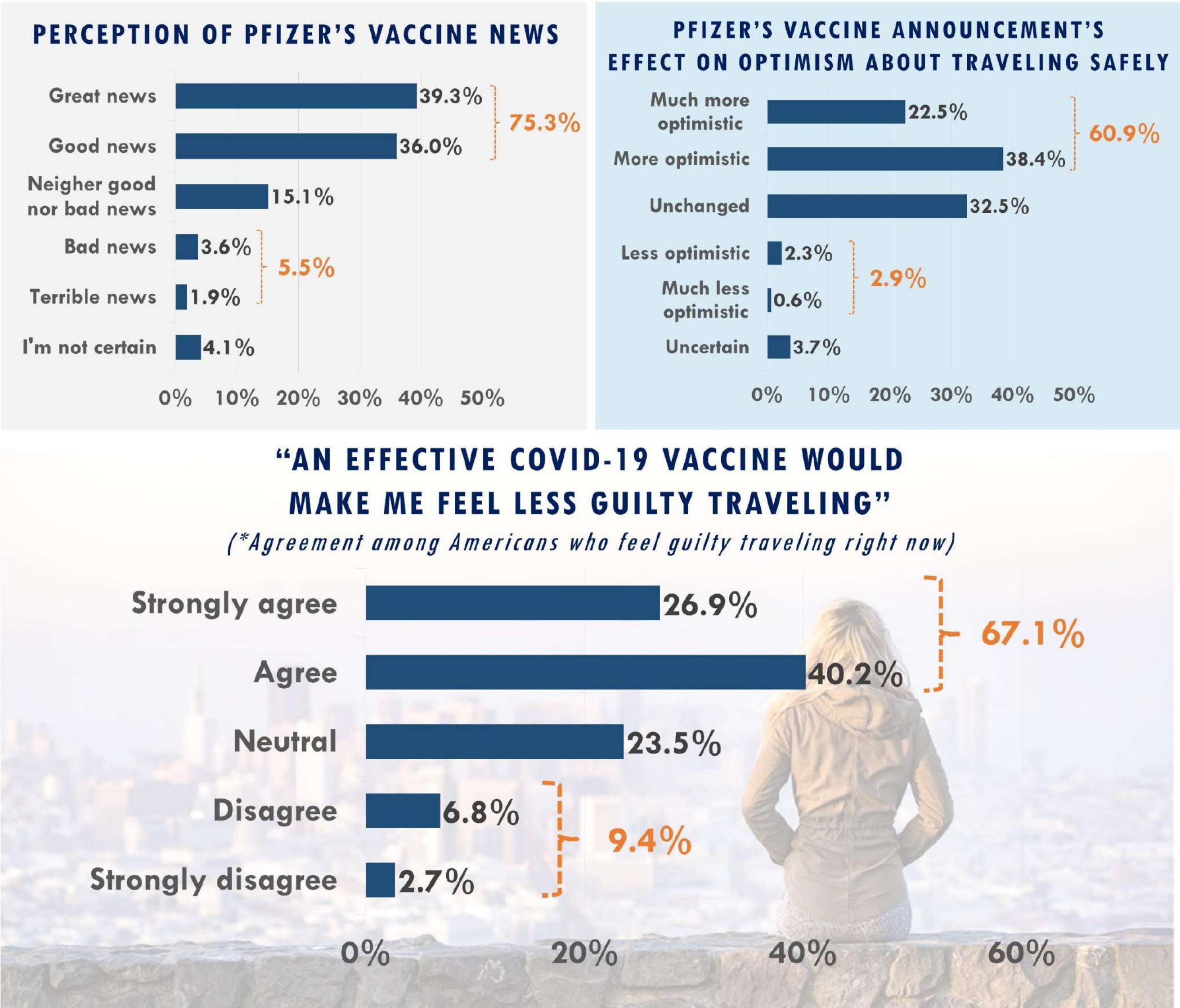
American Travelers Reaction to Pfizer's Vaccine Announcement

Perhaps the best news the travel industry has received in a long while was pharmaceutical company Pfizer's announcement that their experimental vaccine is likely more than 90 percent effective at preventing the Coronavirus disease.

Indeed, over 75% of American travelers took this as good or great news, with 60.9% saying the announcement made them more or much more optimistic that they can travel safely in 2021. Now 42.0% of American travelers say if a COVID-19 vaccine is developed later this year (or early next year) and approved for use they would take it, up from 39.2% last week. For the nearly half of American travelers who say they would feel guilty traveling right now, two-thirds of this group says an effective vaccine would assuage this guilt.

(Base: Wave 36 data. All respondents, 1,205 completed surveys. Data collected November 13-15, 2020)

AMERICAN TRAVELERS REACT TO PFIZER'S VACCINE ANNOUNCEMENT



Best Spokesperson for Vaccine Program

Inspired by [NPR's recent story](#) on how Elvis Presley was used to help market the polio vaccine, American travelers surveyed were asked to name a celebrity or public figure they feel would be best to market participation in a national vaccine program.

The responses were as interesting and varied as America itself, but with our National Institute of Allergy and Infectious Diseases Director, Dr. Anthony Fauci, coming out on top.

OPINIONS ON THE BEST SPOKESPERSON FOR VACCINE PROGRAM AS OF NOVEMBER 15TH



Background: Right now many Americans say they are not yet ready to take a vaccine when it is ready. It is likely that America will need to “sell” the idea of taking the vaccine to a skeptical public. With that in mind, please answer the following question.

Question: What one celebrity or public figure would be the best spokesperson to convince people like yourself to participate in a vaccine program? (write in one name below)

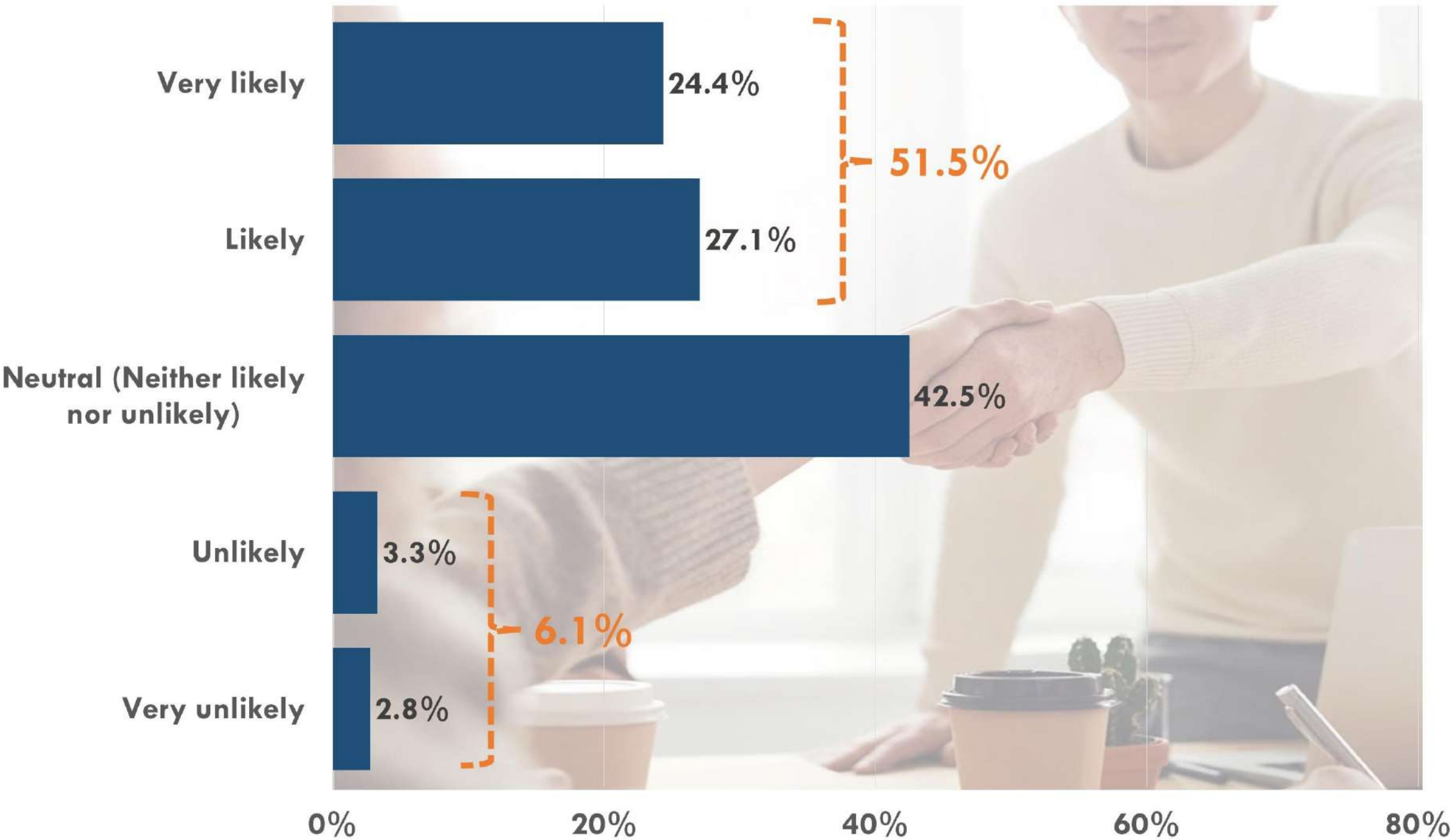
(Base: Wave 36 data. All respondents, 337 completed surveys. Data collected Nov 13-15, 2020)

Likelihood to Support Businesses that Make a Positive Societal Impact

Finally, we are reminded this week about the positivity of travel on human culture.

Nearly half of American travelers say they are likely to support minority-owned businesses on their next trip, and over half are likely to support businesses that they believe make a positive societal impact wherever their travels take them next.

AMERICAN TRAVELERS' LIKELIHOOD TO SUPPORT BUSINESSES THAT MAKE A POSITIVE SOCIETAL IMPACT AS OF NOVEMBER 15TH



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 36 data. All respondents, 1,184 completed surveys. Data collected Nov 13-15, 2020)



Coronavirus Travel Sentiment Index

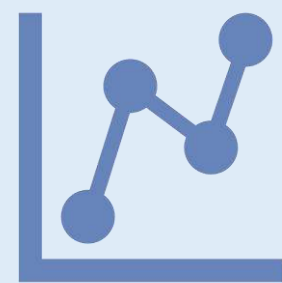
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 16th

What is a Predictive Index?



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



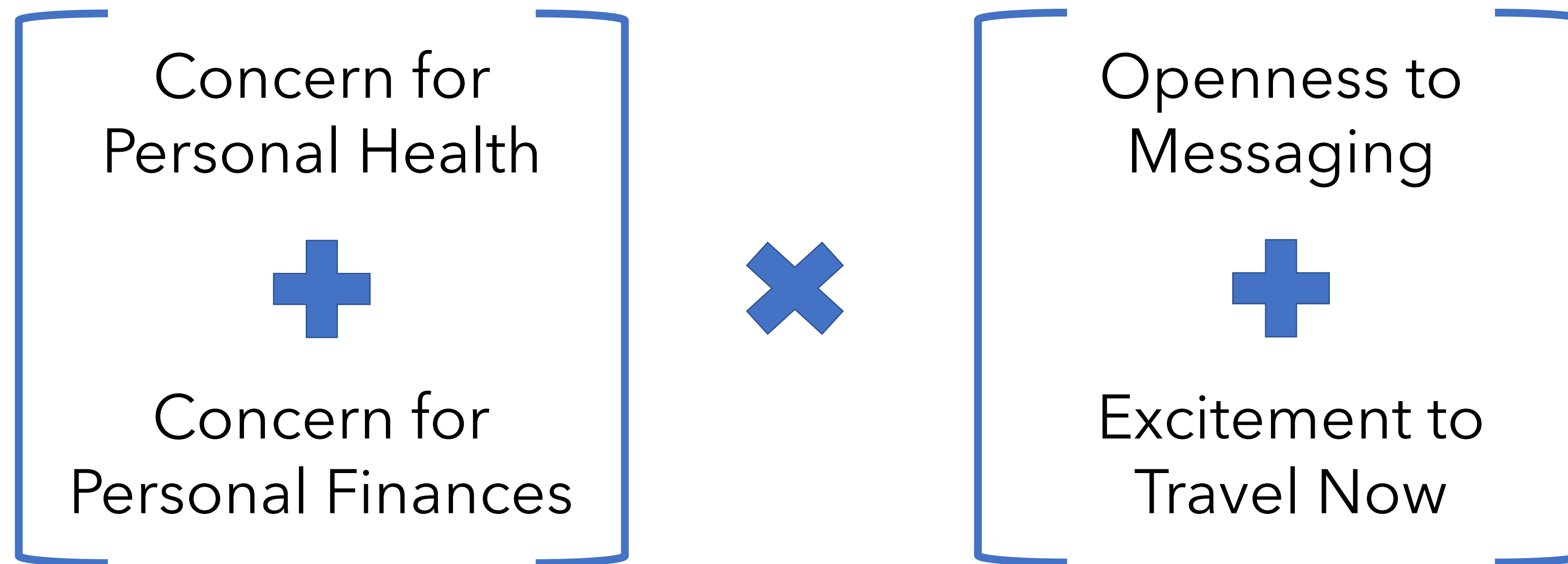
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

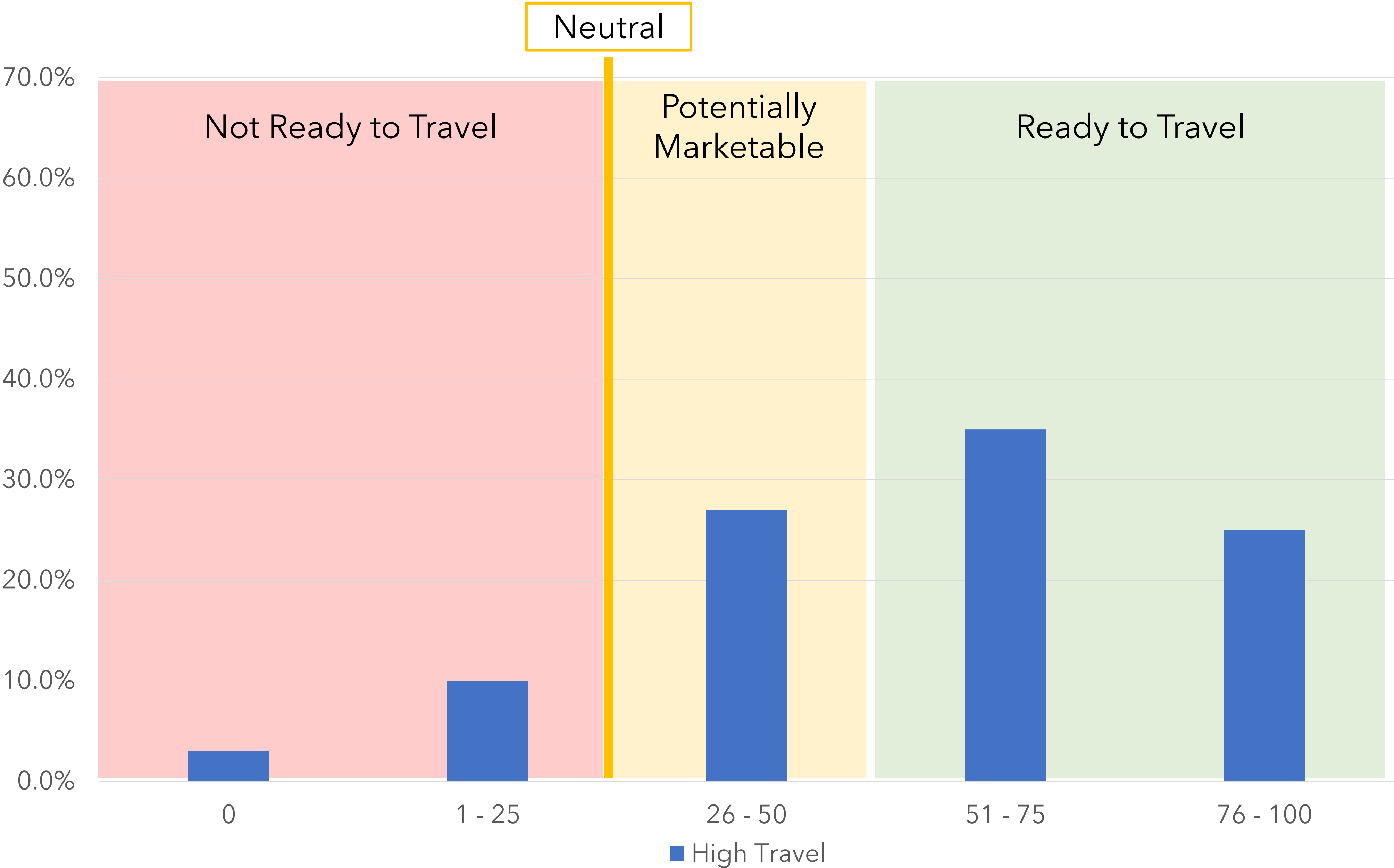
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



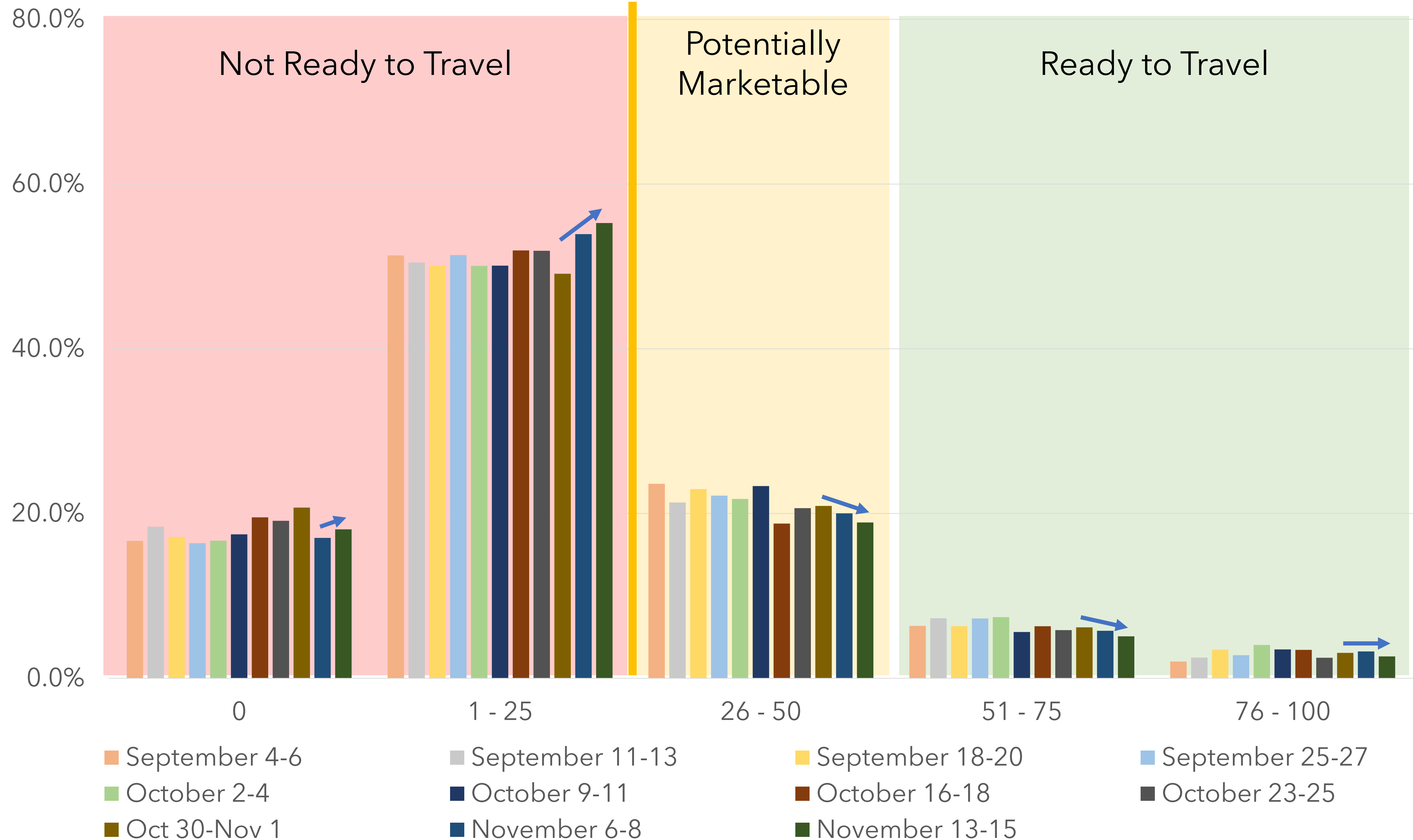
*Normalized to a 100pt scale

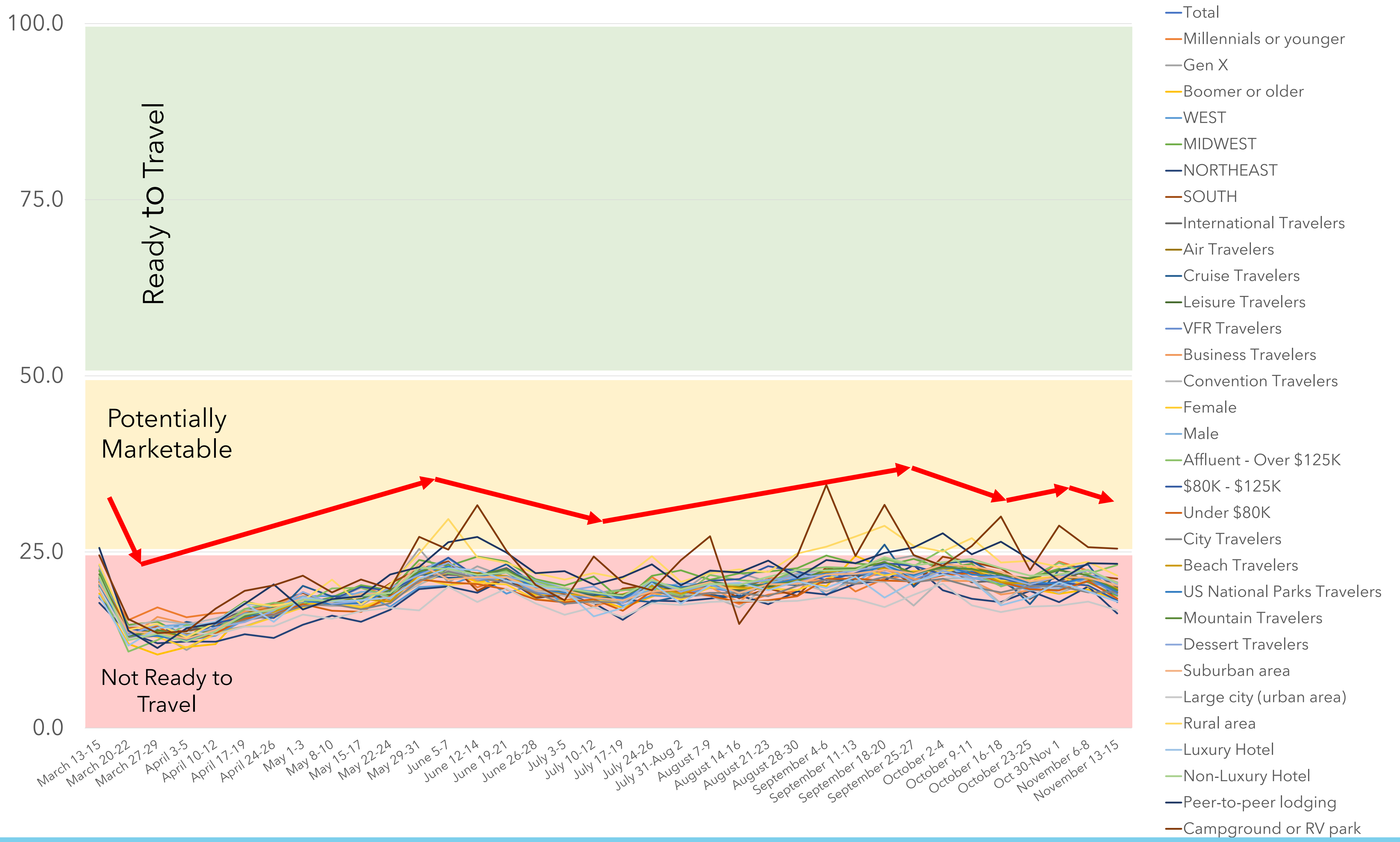
Healthy Travel Outlook

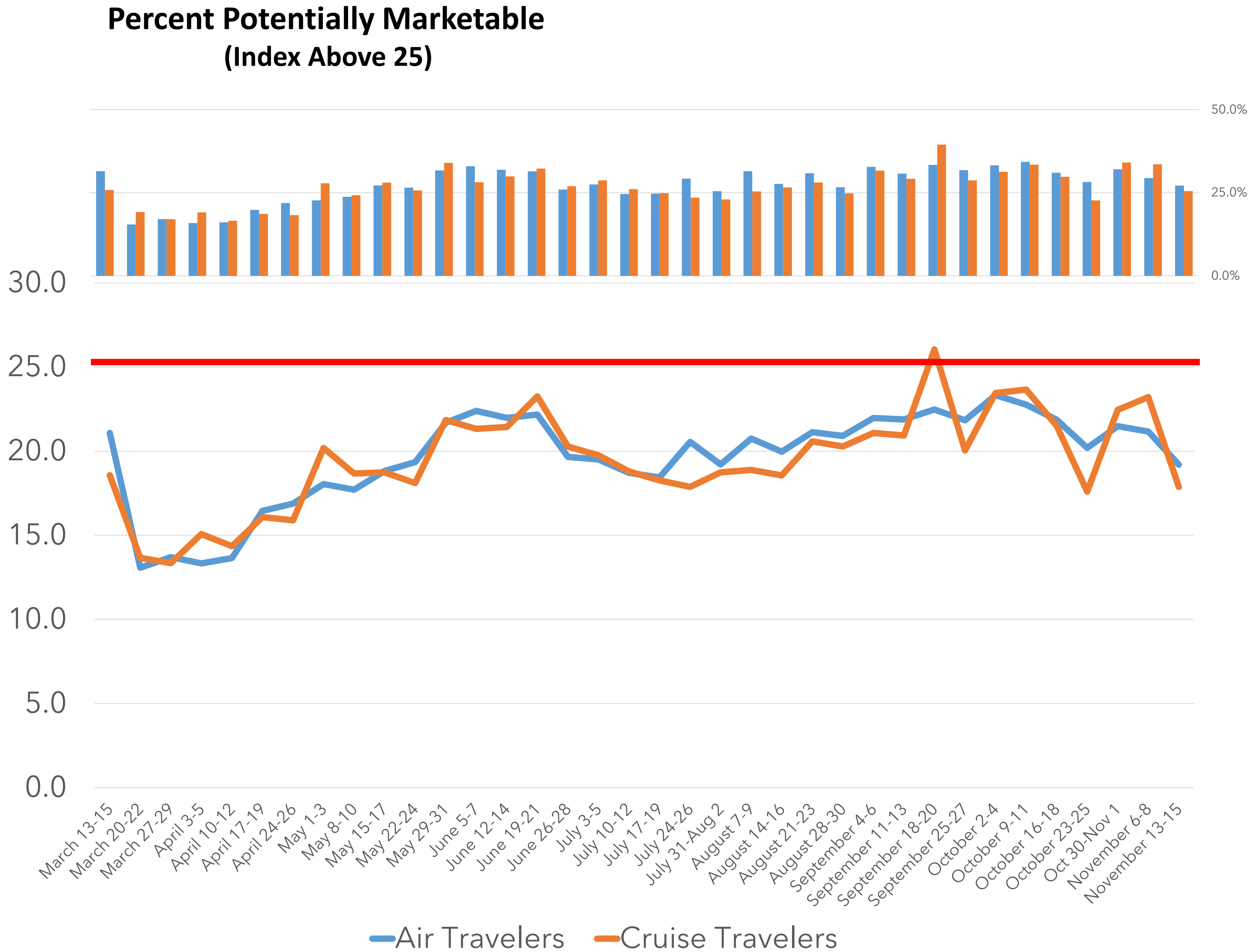
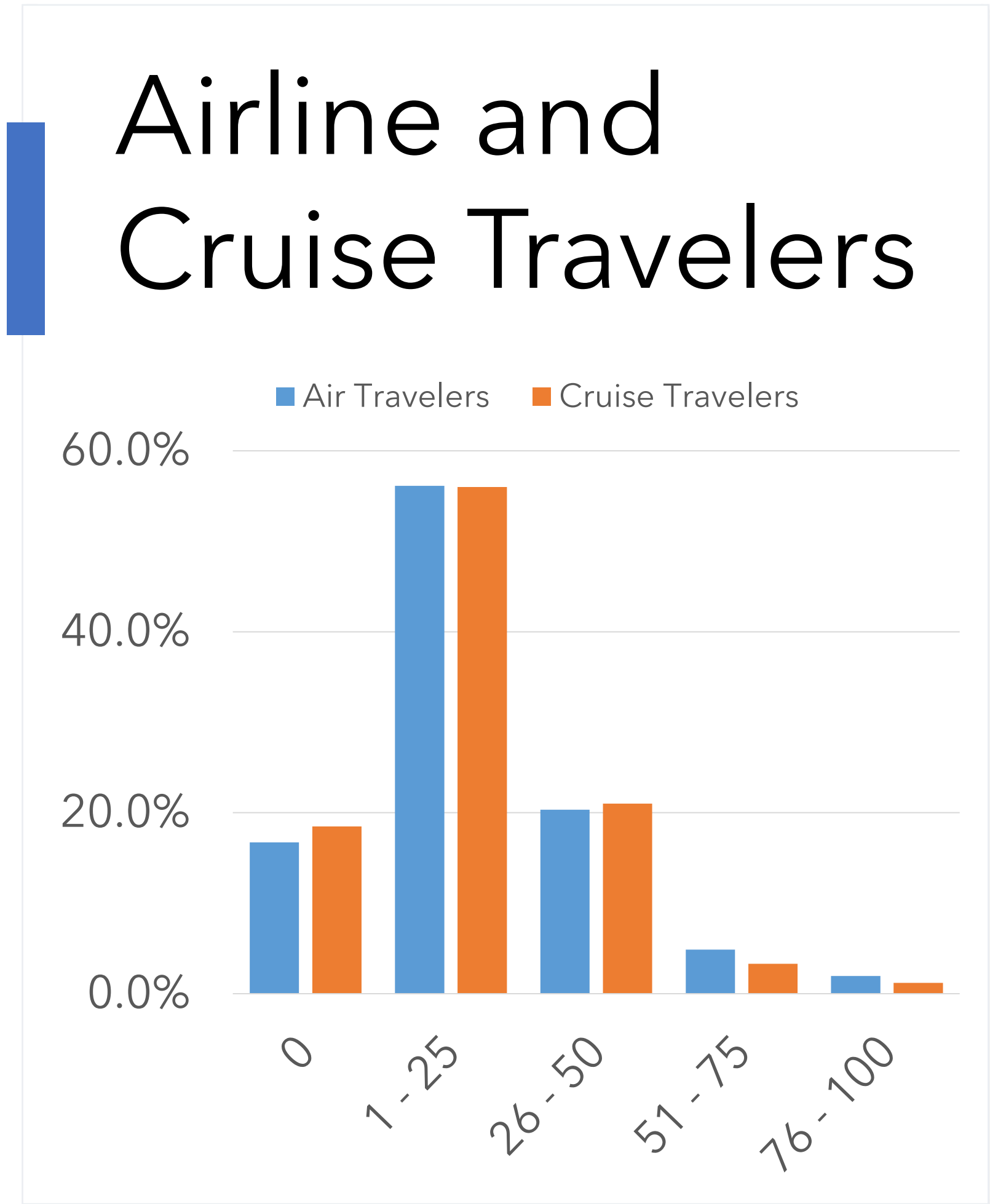


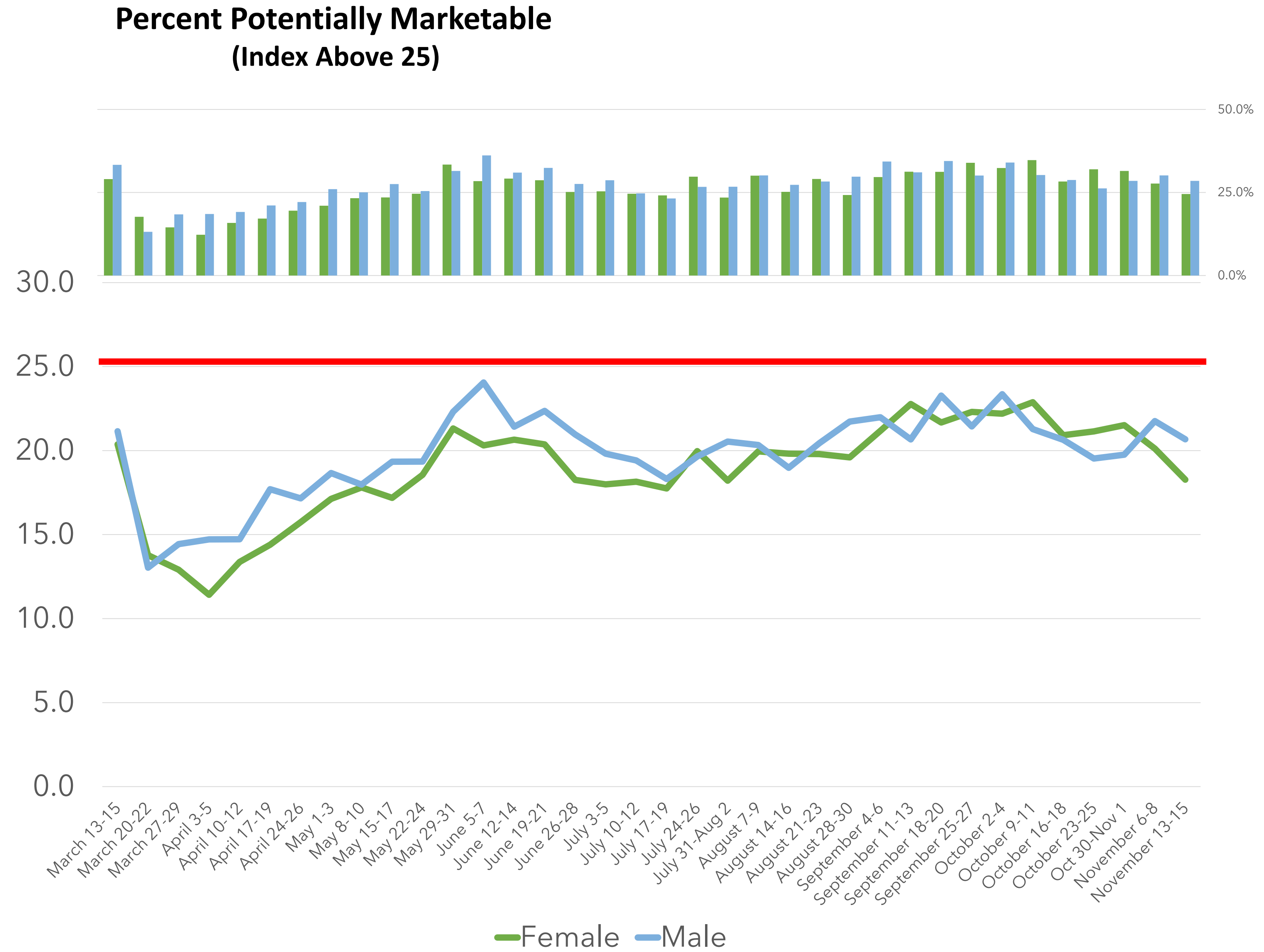
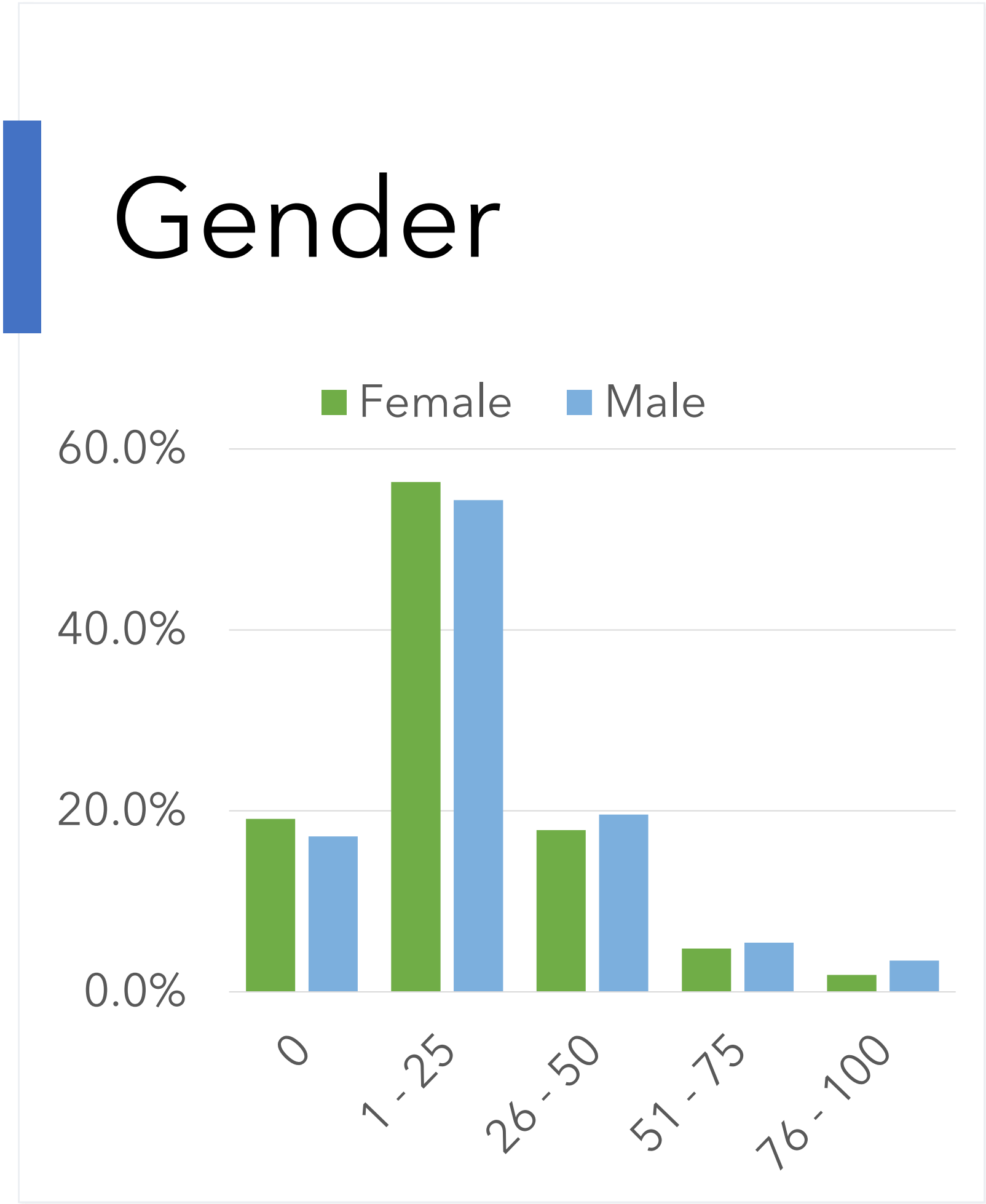
Travel Outlook

Neutral



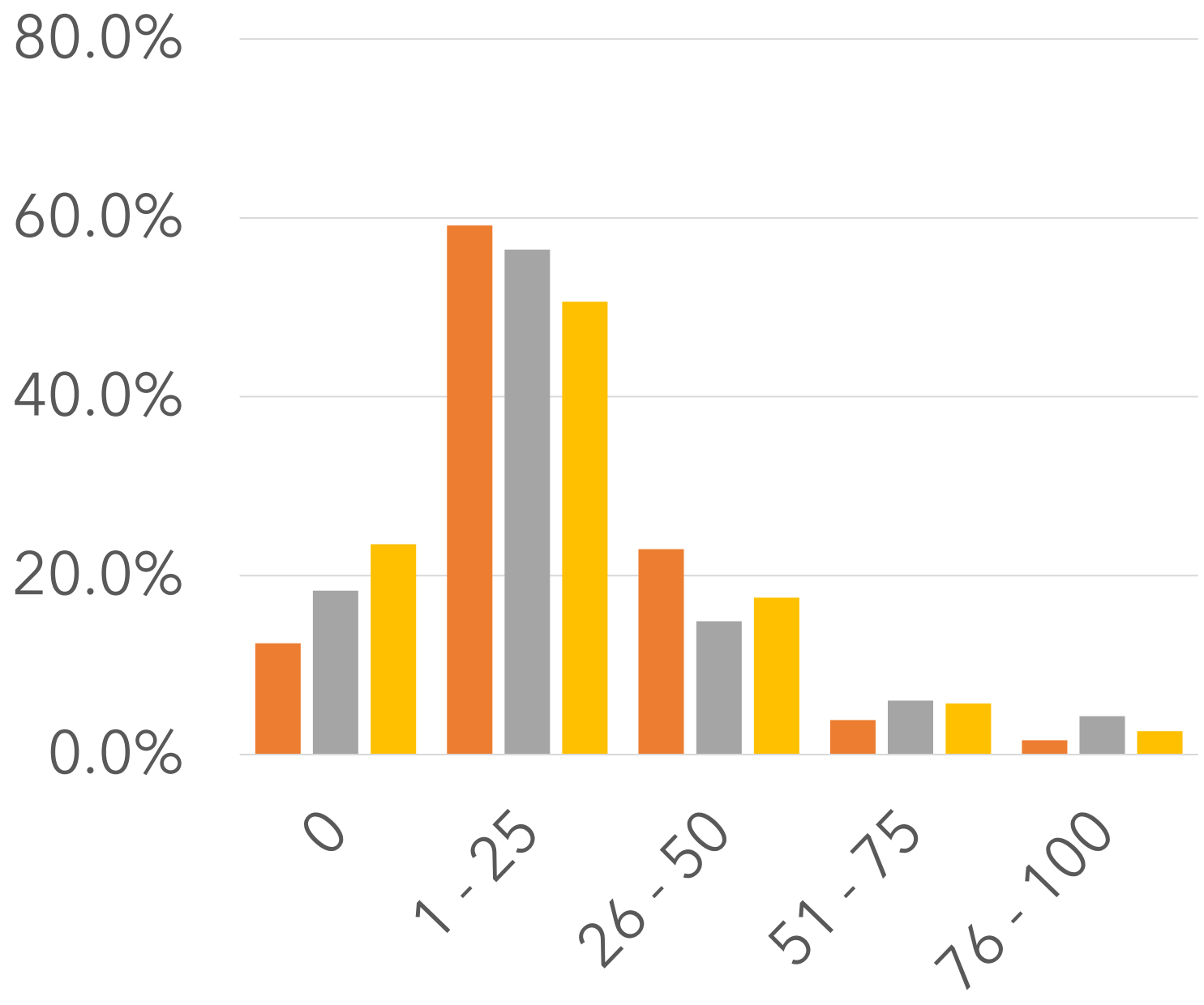




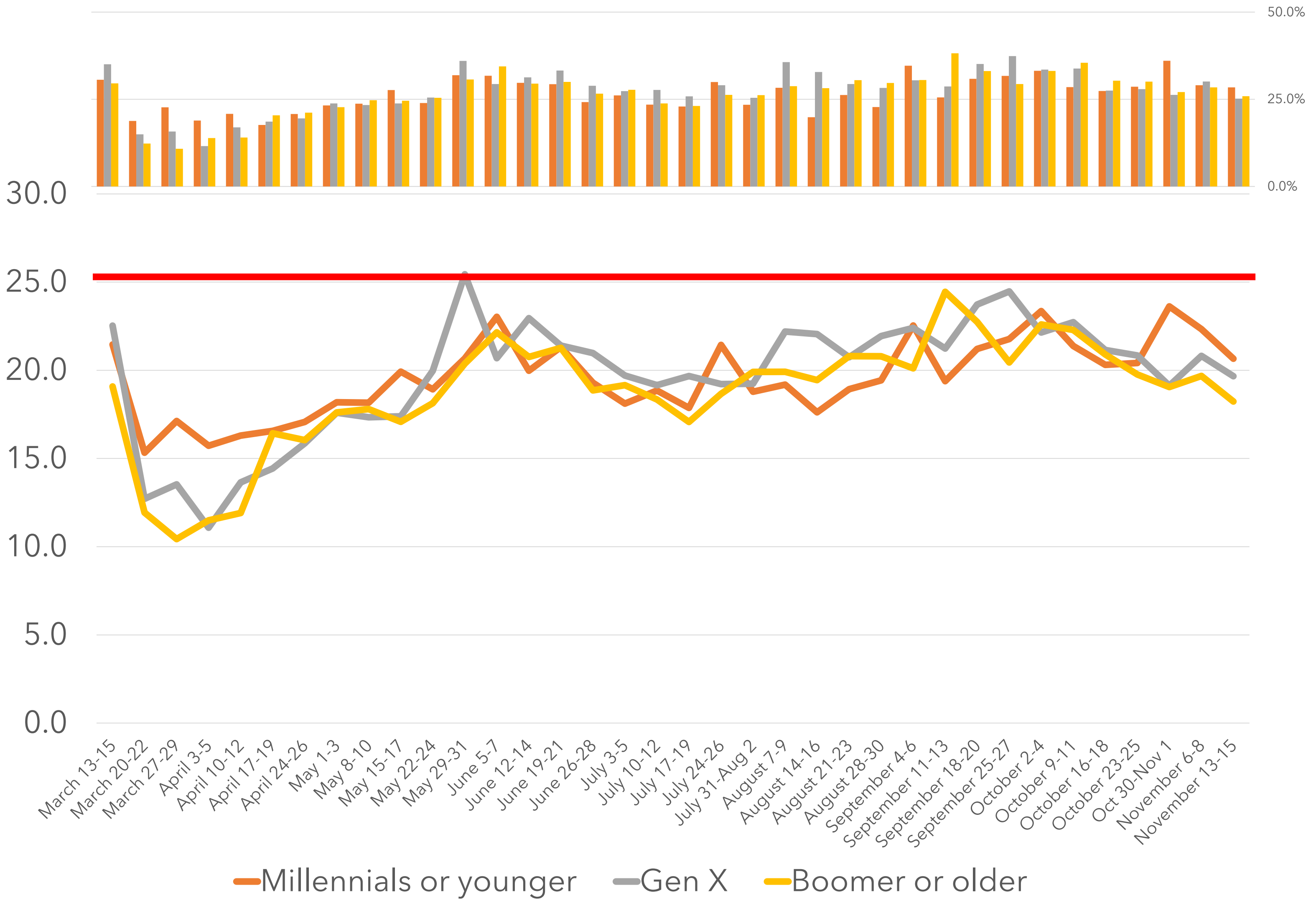


Generation

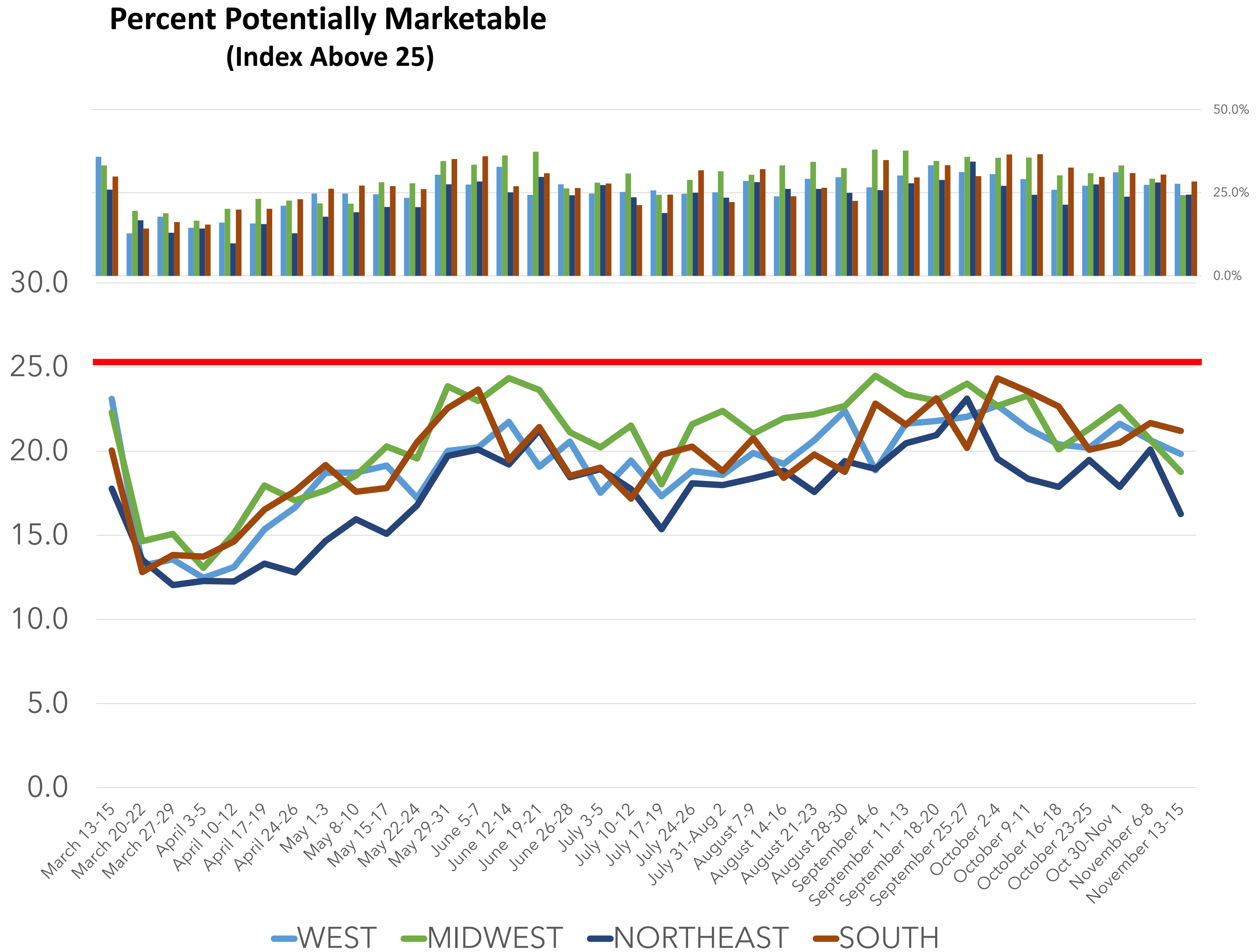
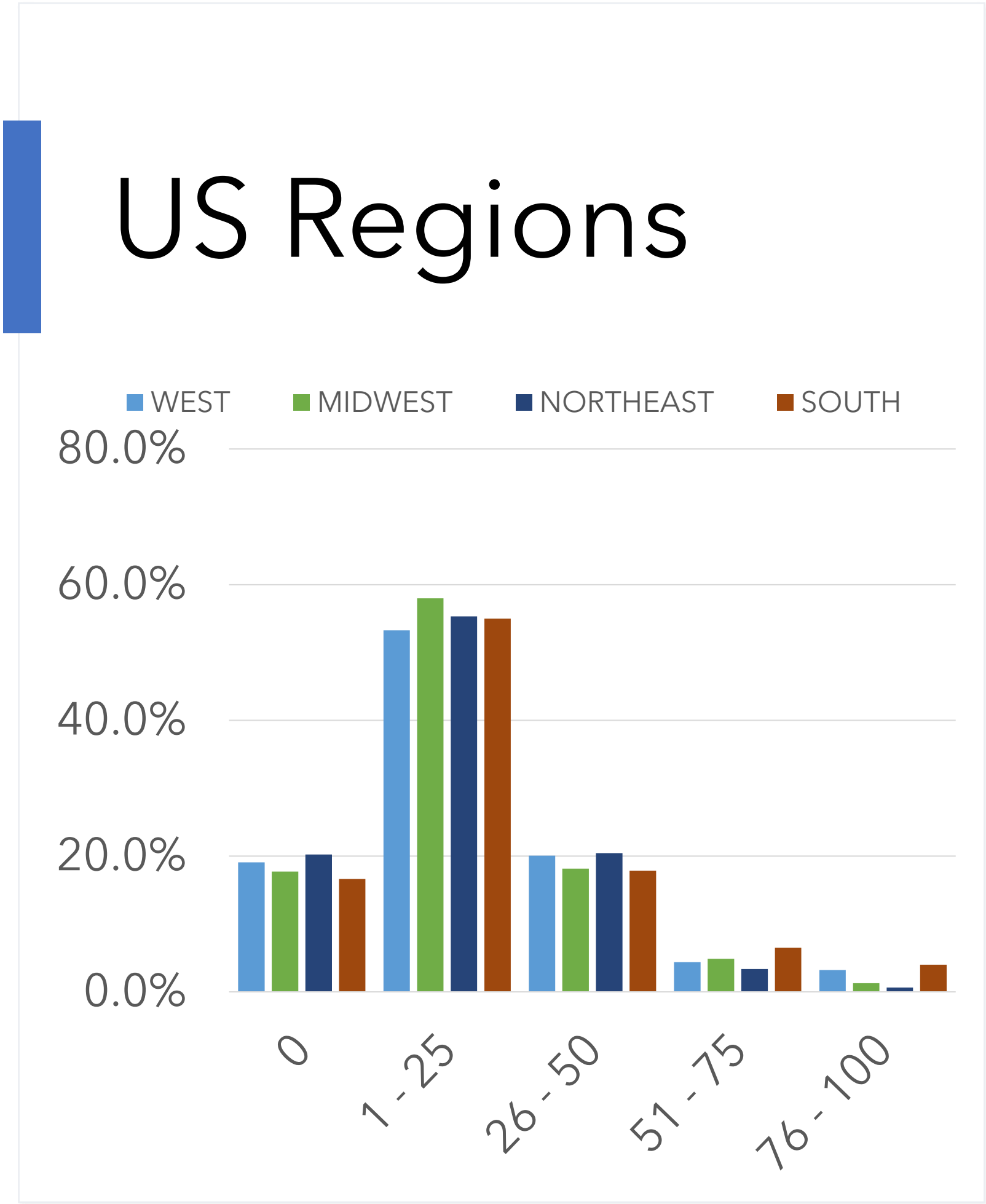
Millennials or younger Gen X Boomer or older



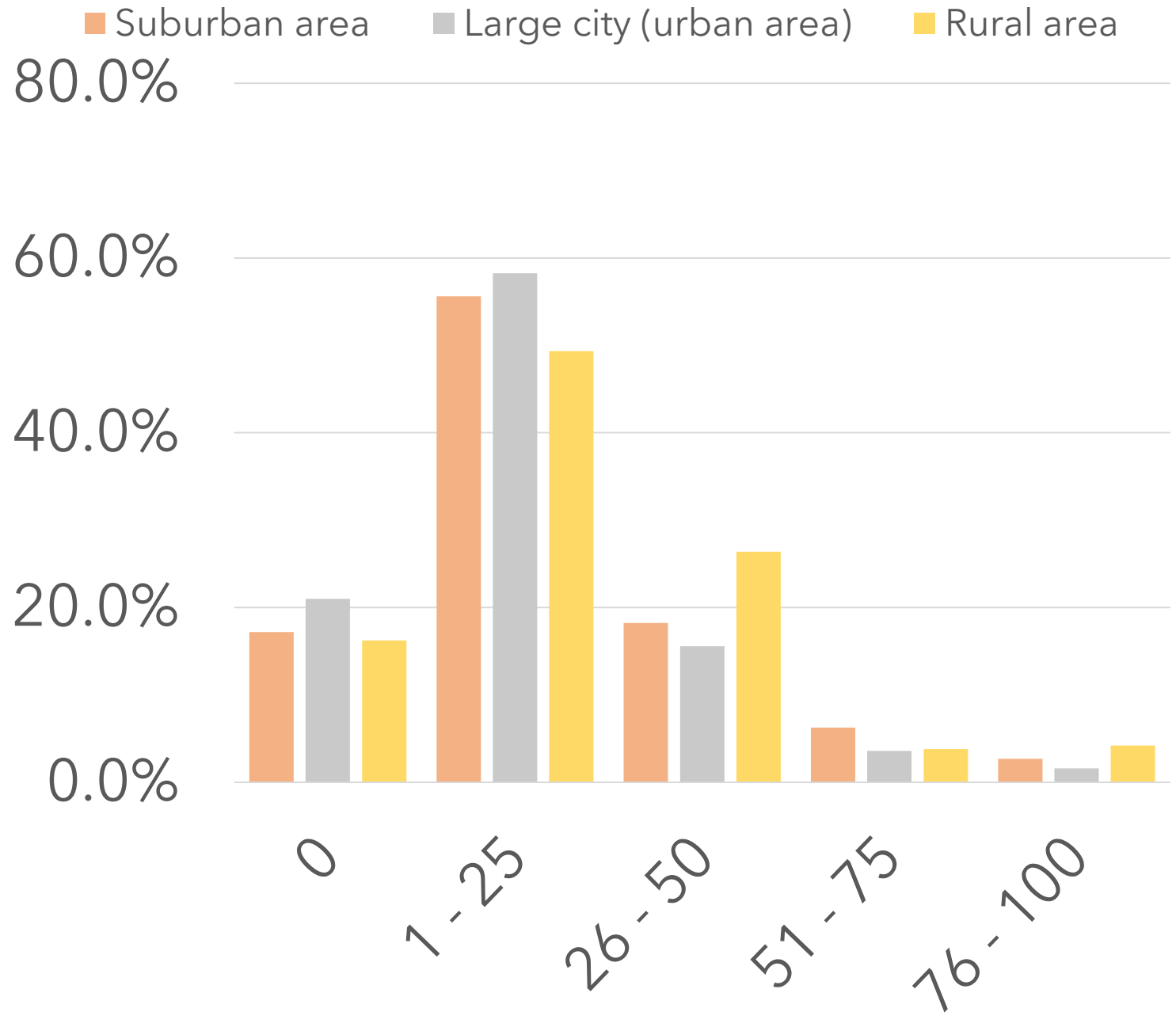
Percent Potentially Marketable (Index Above 25)



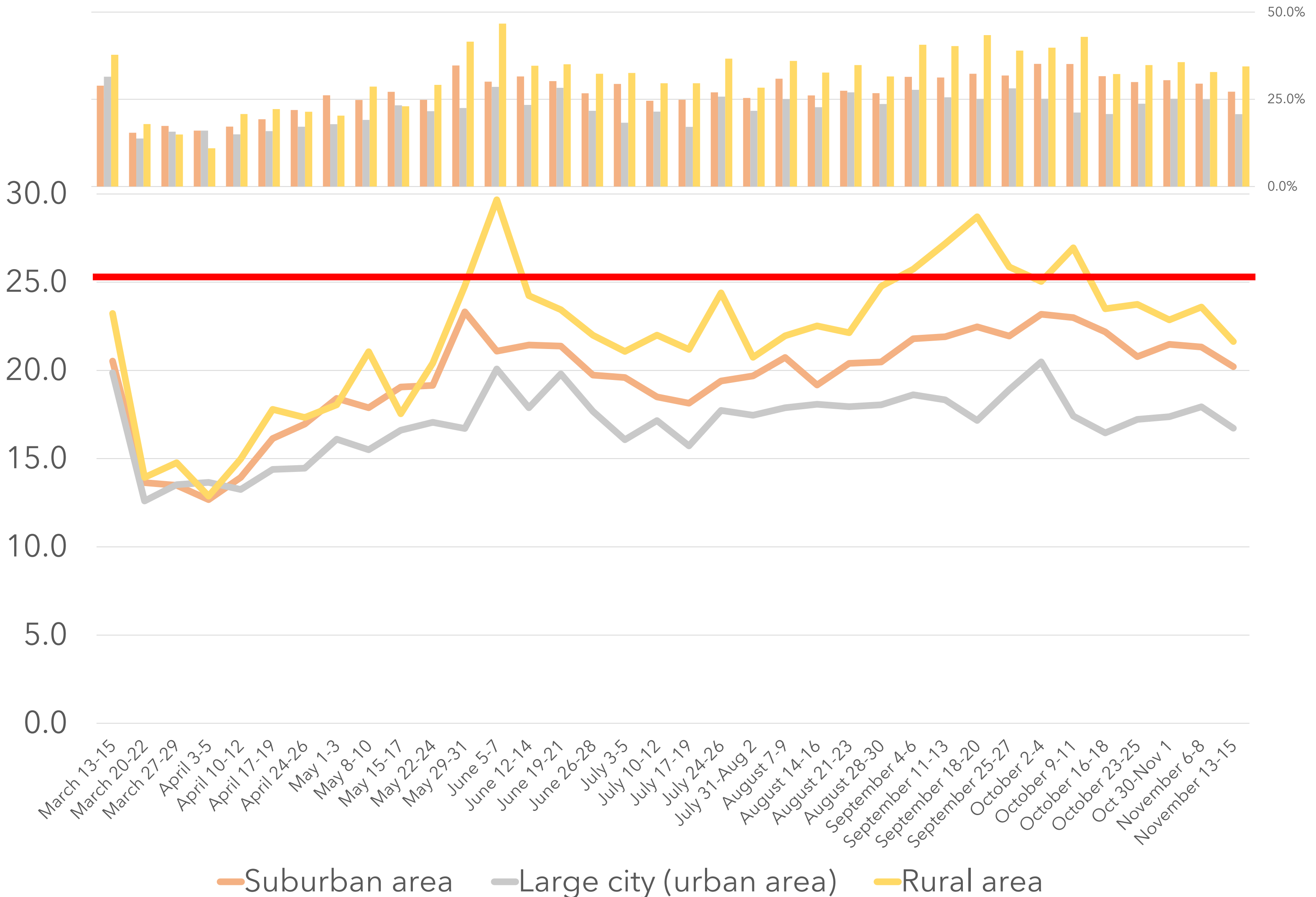
Millennials or younger Gen X Boomer or older



Residence Type

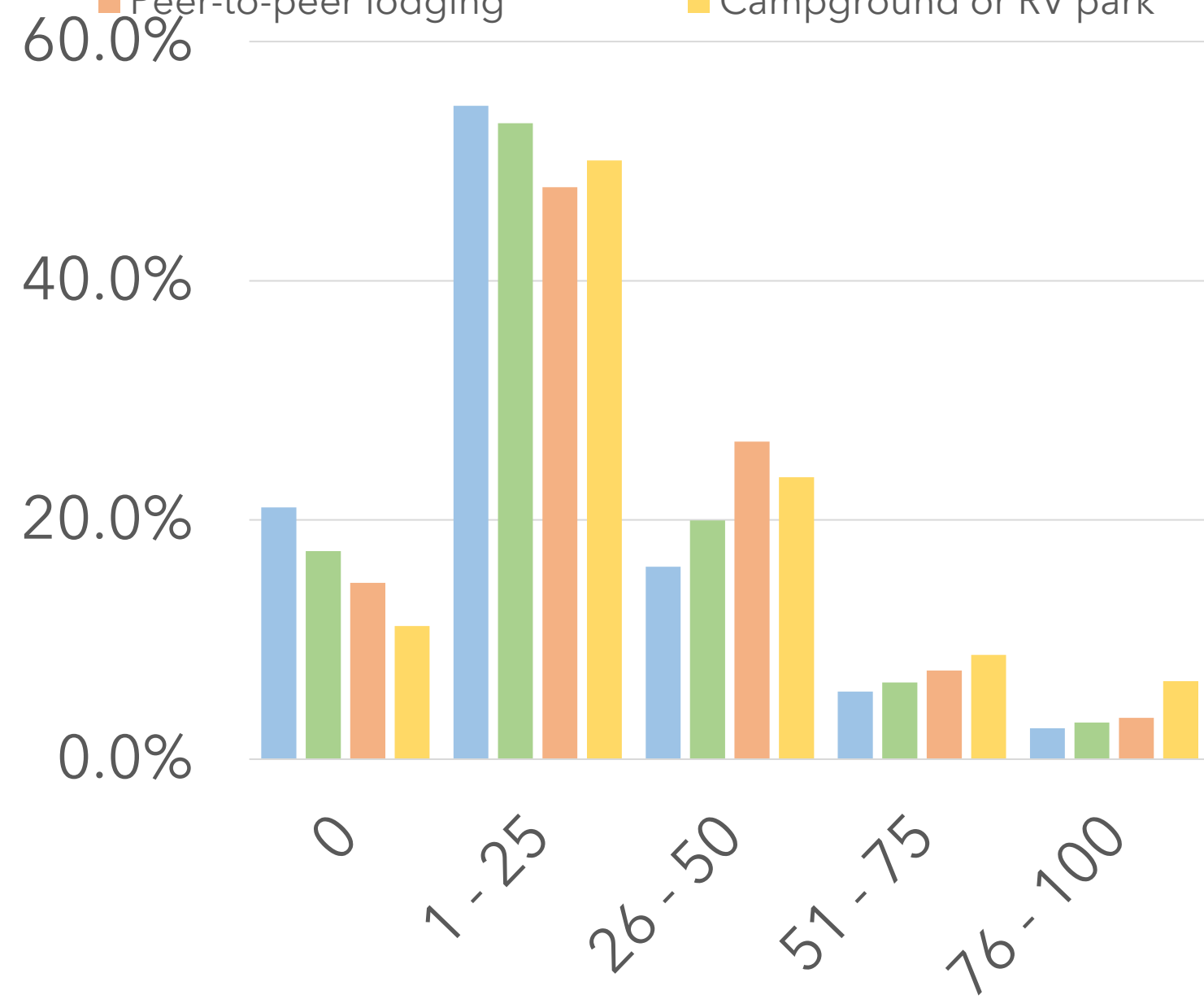


Percent Potentially Marketable (Index Above 25)

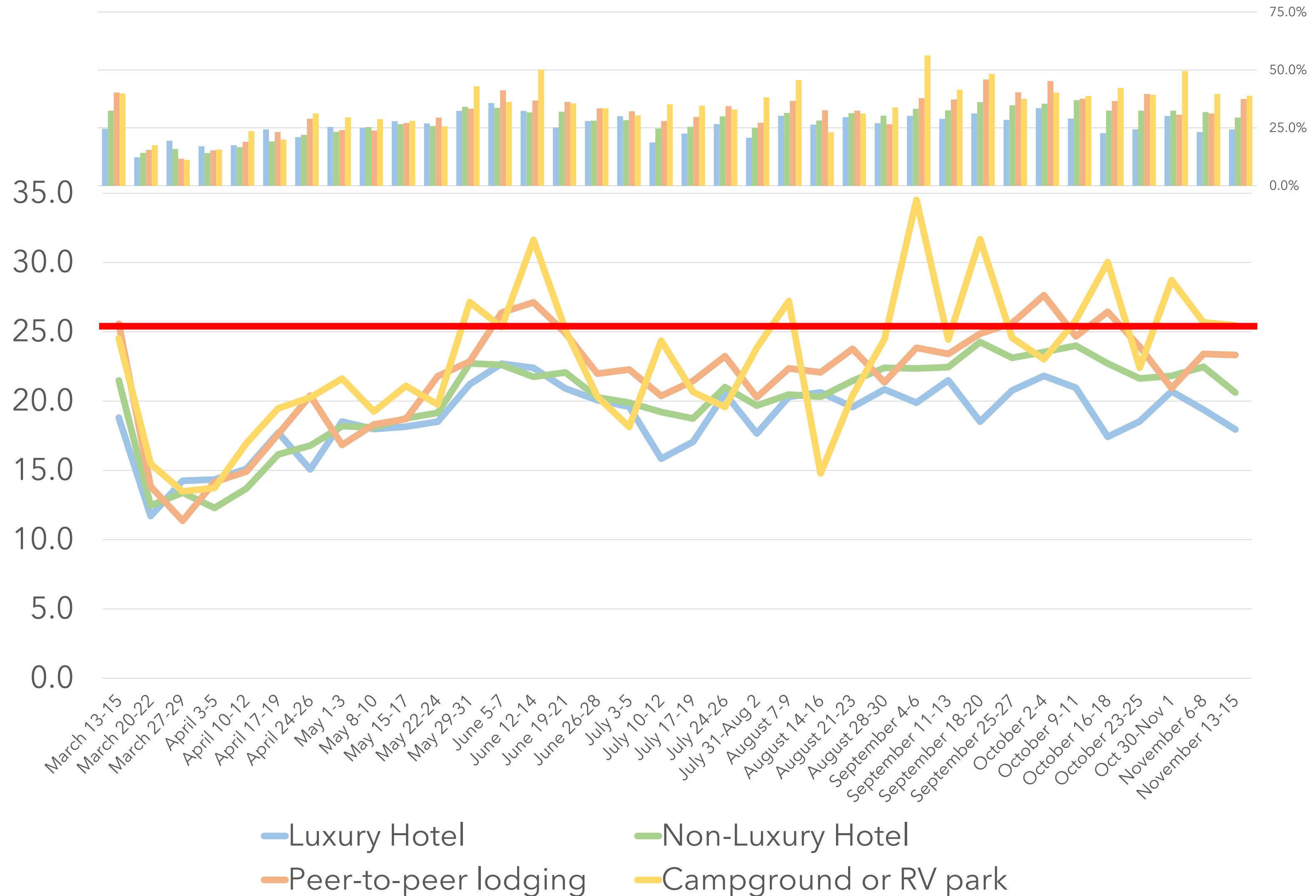


Lodging Preference

■ Luxury Hotel
 ■ Non-Luxury Hotel
 ■ Peer-to-peer lodging
 ■ Campground or RV park



Percent Potentially Marketable (Index Above 25)





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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