

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

**KEY FINDINGS—WEEK OF November 23<sup>rd</sup>, 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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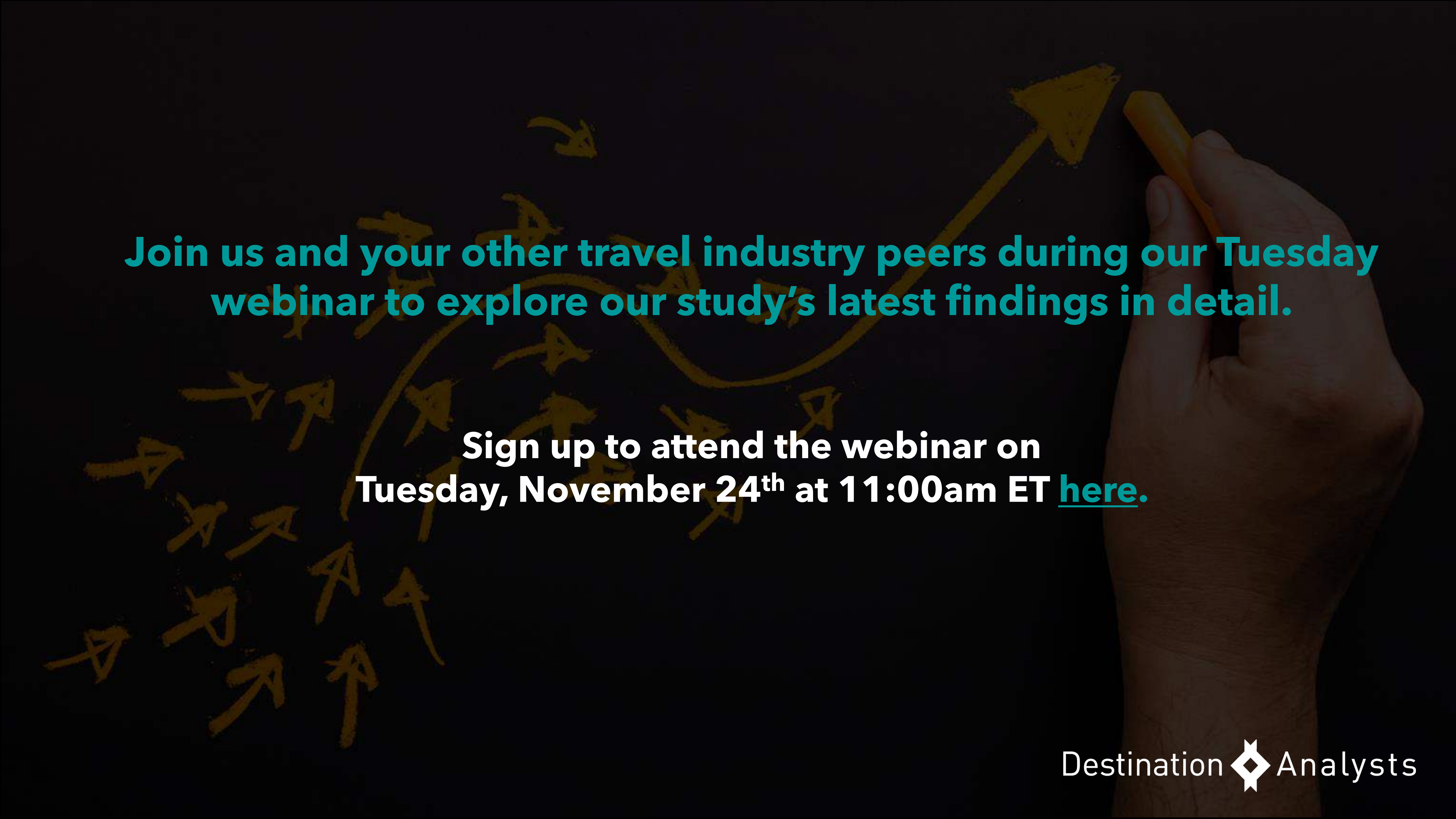


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**Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.**

**Sign up to attend the webinar on  
Tuesday, November 24<sup>th</sup> at 11:00am ET [here](#).**



# **Key Findings for the Week of November 23<sup>rd</sup>**

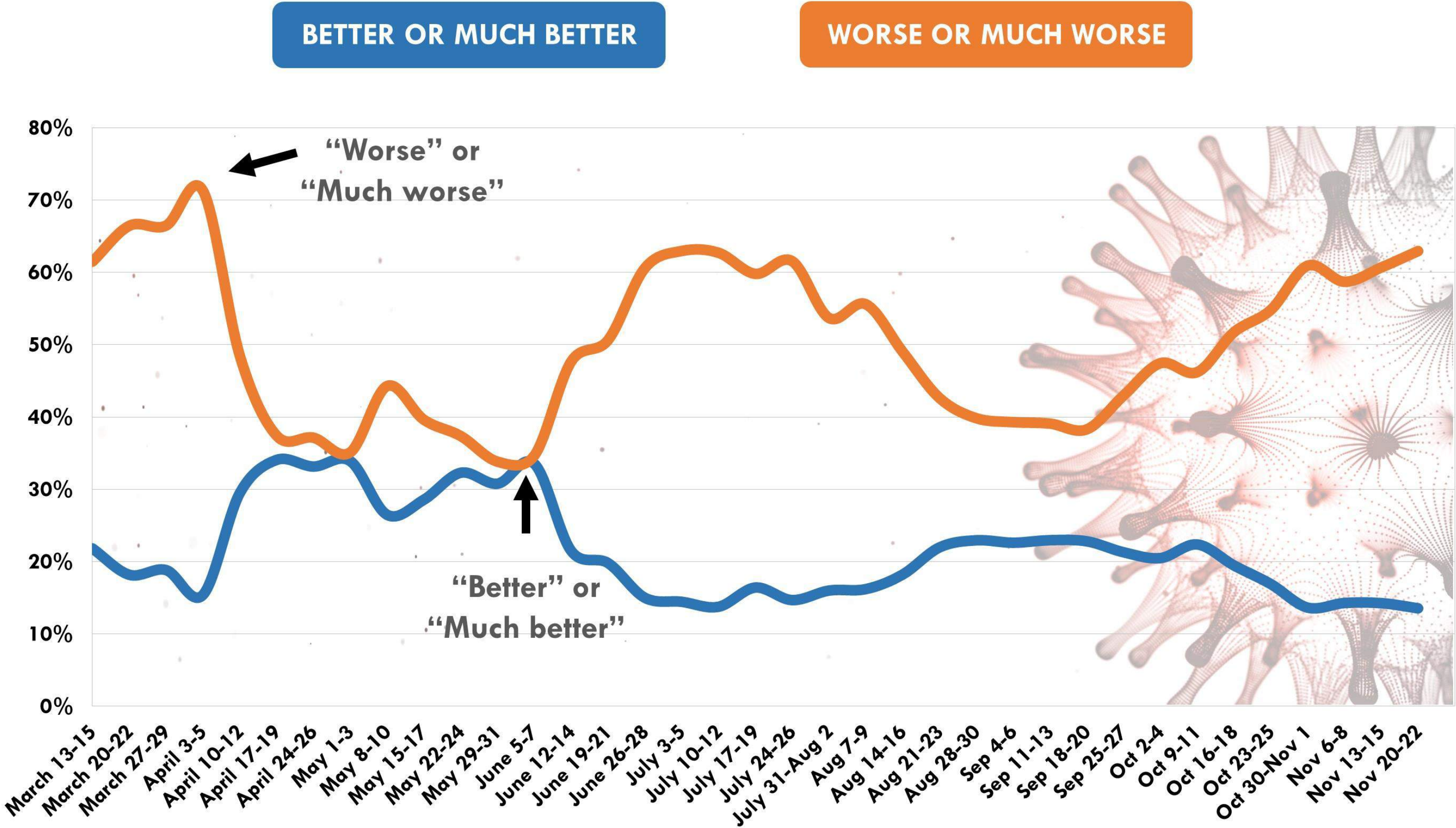
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# Expectations for the Coronavirus Outbreak

As Americans head into Thanksgiving week—the fourth major travel holiday during this pandemic—average daily coronavirus cases have spiked to more than two times what they were in July (during the previous summer surge in cases), and American deaths from COVID-19 cases surpassed a quarter of a million. Anxiety continues to rise, as 74.4% of Americans has a high degree of concern about their friends/family contracting the virus and 69.4% are highly concerned about contracting it themselves. **Americans’ pessimism about the virus’ course in our country is now back at the level it was when we headed into the July Fourth weekend, with 62.9% feeling things are going to get worse in the next month and only 13.5% feeling it will get better.**

## EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK MARCH 15 – NOVEMBER 22



**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 \_\_\_\_\_

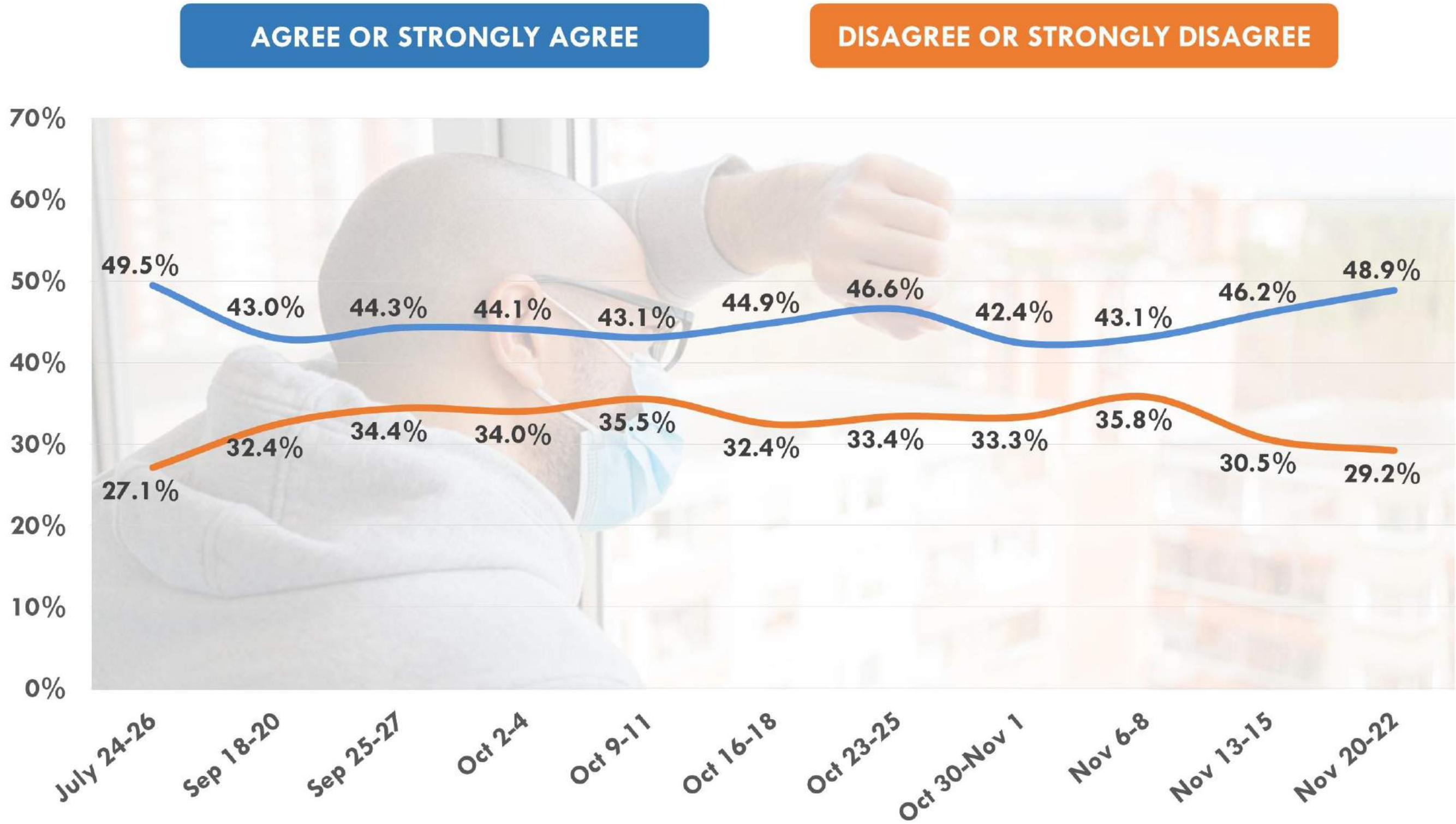
(Base: Waves 1-37. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.)



# Loss of Interest in Travel

This week, 61.9% of American travelers continued to agree that the current surge in cases has made them less likely to travel in the next three months. **The percent of Americans who agree they have lost their interest in travel for the time being is now approaching half—up 6 percentage points in the past month and at a level last seen in July.** Six-in-ten American travelers continue to feel they would not be able to fully enjoy travel right now, and nearly 52% say they would feel guilty traveling, up 5 percentage points in a week. Americans’ state of mind around travel also took a dip after holding constant for the last two weeks, with those in a readiness mindset falling to 53.9%.

## LOSS OF INTEREST IN TRAVEL JULY 24 – NOVEMBER 22



**Question:** How much do you agree with the following statement?  
**Statement:** I have lost my interest in/taste for traveling for the time being.

(Base: Waves 1-37. 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 and 1,205 completed surveys.)



# Perceived Safety of a Ski/Snowboard Vacation

The poor course of the pandemic also appears to be affecting sentiment towards ski/snowboard travel this season.

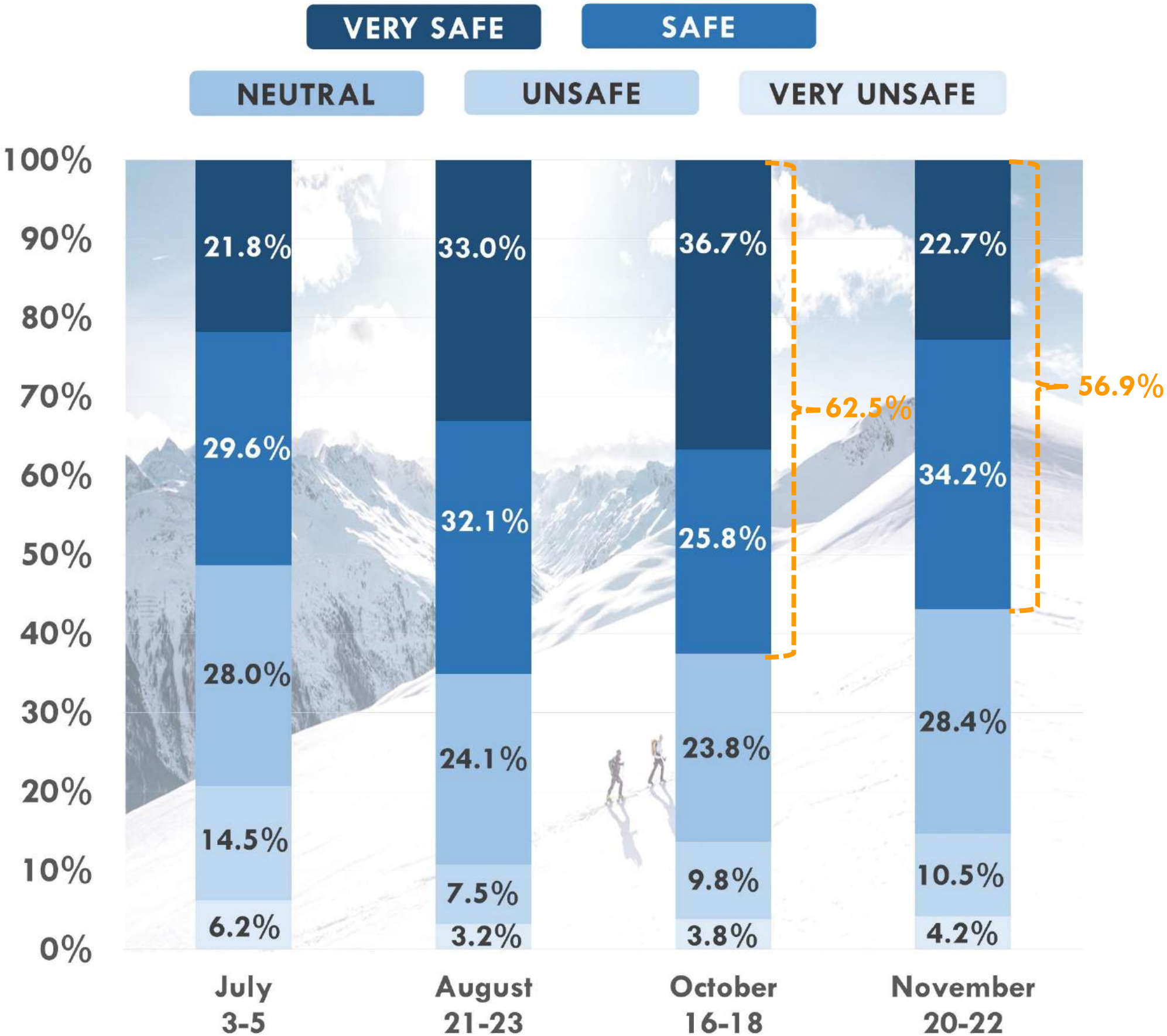
Fewer ski/snowboard travelers feel that a ski/snowboard trip is safe this 2020/2021 season than did in October (56.9% vs 62.5%).

However, over two-thirds of these travelers say that pandemic protocols such as requiring guests to book their ski dates in advance and limiting the number of people allowed on the mountain make them more interested in taking a ski/snowboard trip this season.

**Question:** At this moment, how safe would you feel taking a ski/snowboard vacation next season (Winter 2020/2021)?

(Base: Waves 17, 24, 32 and 37 data. Respondents who are likely to take a ski/snowboard vacation this year, 206, 188, 203 and 203 completed surveys.)

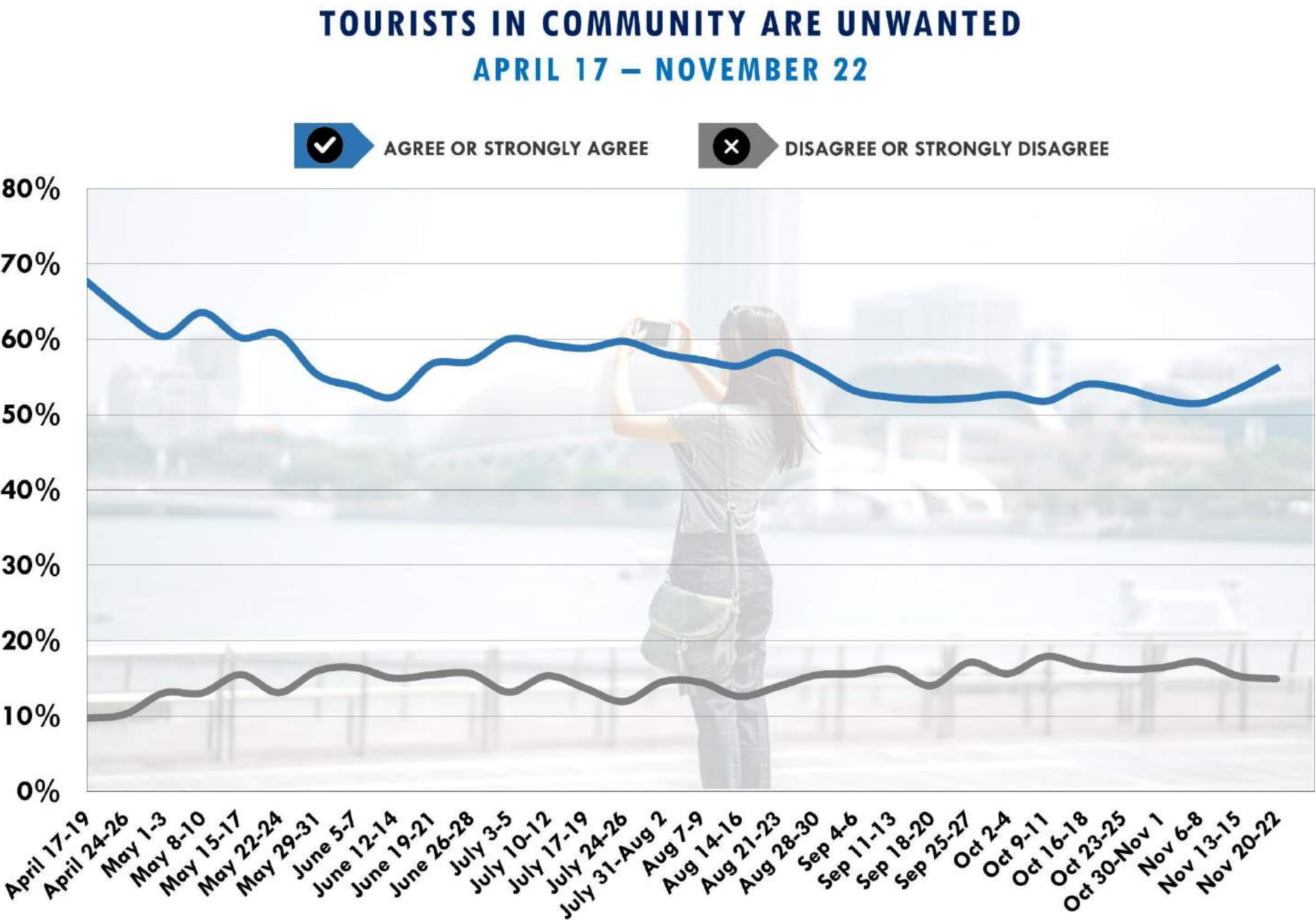
## PERCEIVED SAFETY OF A SKI/SNOWBOARD VACATION THIS SEASON AS OF NOVEMBER 22<sup>ND</sup>





# Tourists in Community and Support for More COVID-19 Rules in Community

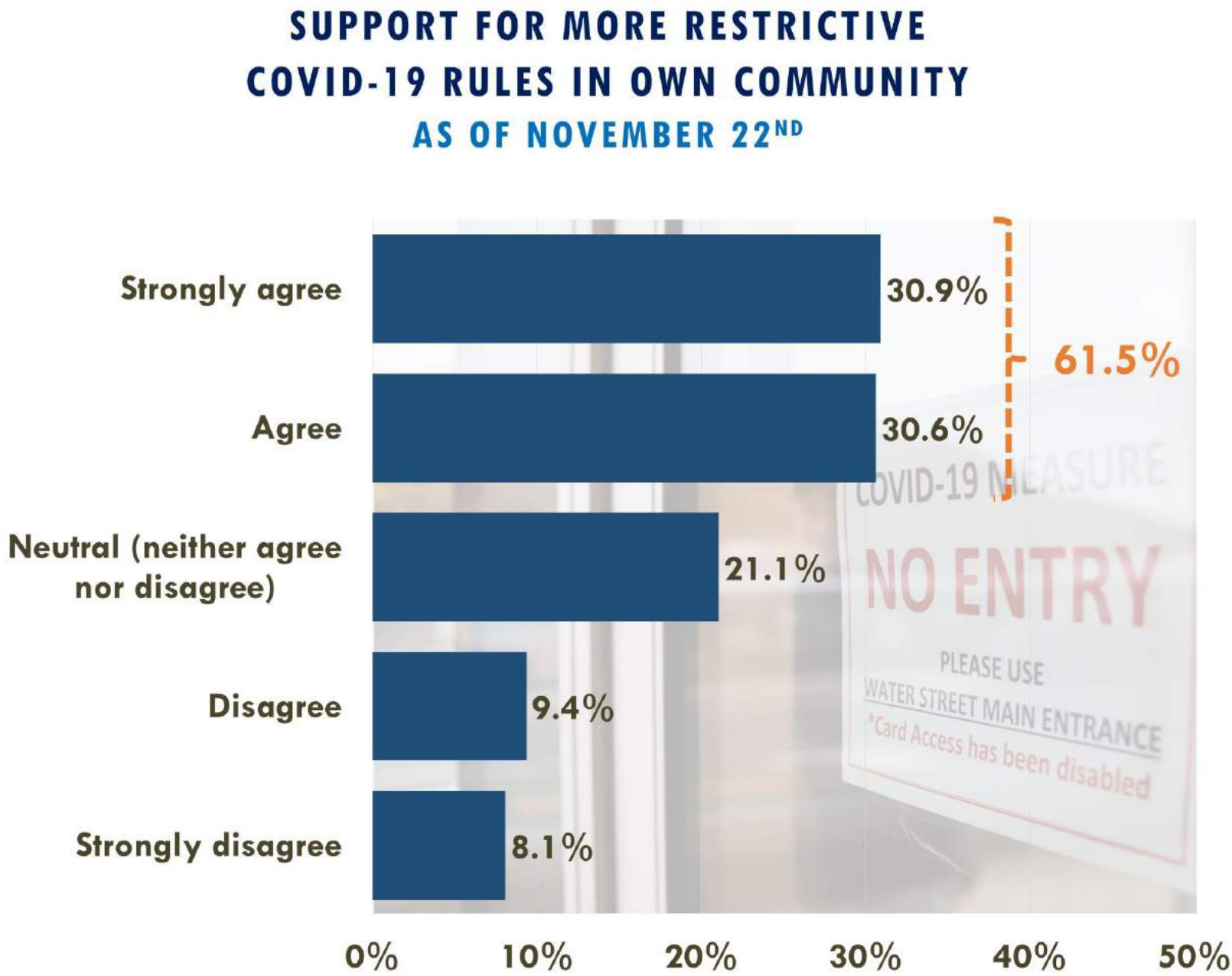
Nevertheless, there are indicators that the impacts of this current virus surge on travel may not be as deep or long-lasting as previous surges. While the perception of travel activities as unsafe has crept up in the last two weeks (54.3%), it is still not near peaks hit in July (60.6%) and April (69.4%). Similarly, engaging in travel avoidance until the coronavirus situation is more resolved is at 56.3%, not hitting prior surge peaks of 62.1% (July) and 82.8% (March). The avoidance of international travel specifically is at 75.2%, still a ways from how Americans were feeling in July (80.2%) and April (82.1%). Avoiding conventions and conferences is at one of the lowest points it's been in the pandemic—falling below 70% for the first time since June 7th. Looking locally, over 40% of Americans feel comfortable going out for leisure activities in their own communities—more than twice the number than in the early stage of the pandemic. While 56.1% do not want tourists coming to their community right now, this sentiment is also not at July and April levels. Perhaps in a nod to lessons learned in previous stages of the pandemic, 61.5% agree they support more restrictive COVID-19 rules being implemented in their home community.



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

**Statement:** I do not want travelers coming to visit my community right now.

(Base: Waves 6-37. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206 and 1,205 completed surveys.)



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

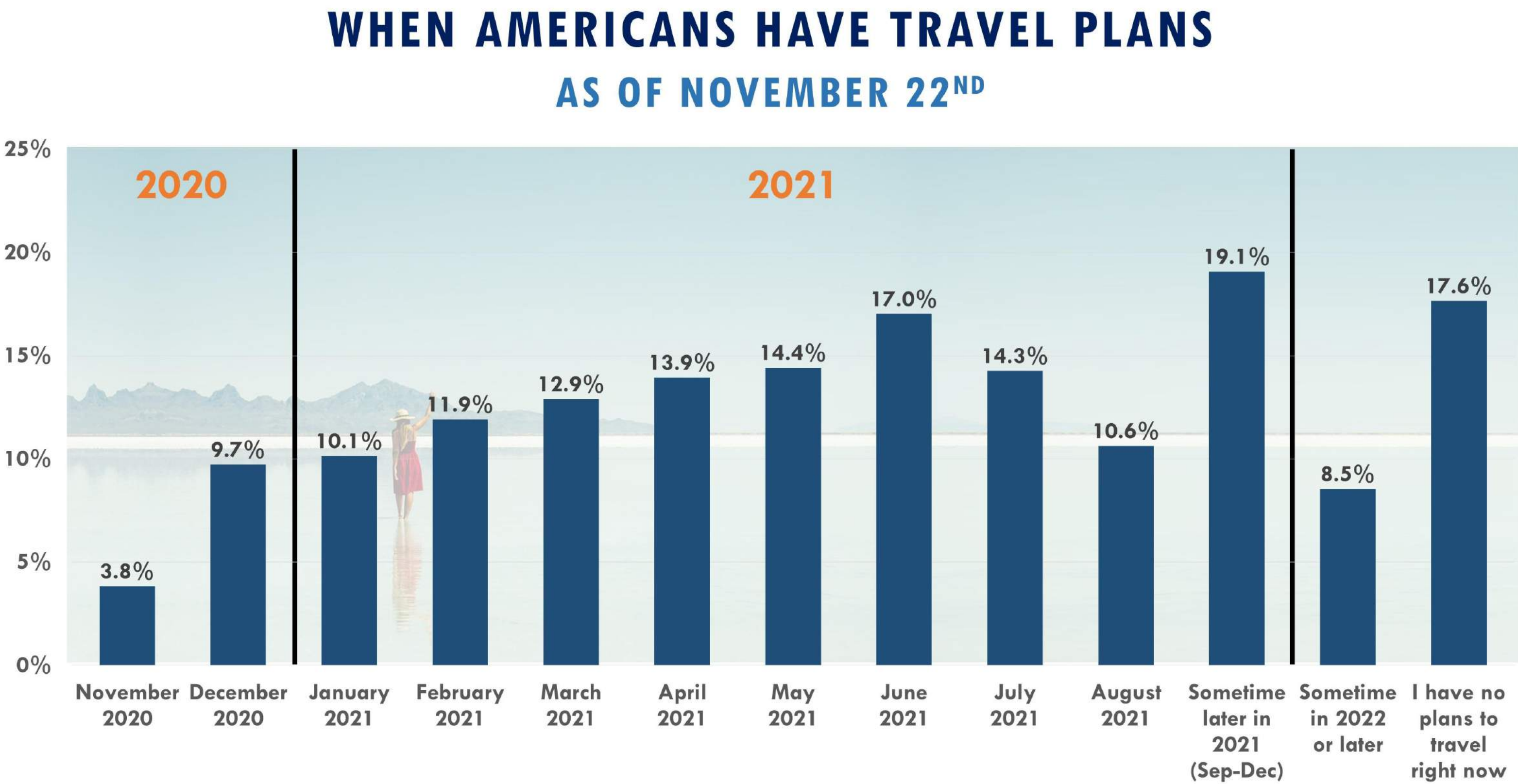
**Statement:** I support more restrictive COVID-19 rules being implemented in my home community.

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

# When Americans Have Travel Plans

Americans continue to report having trips planned over the next year.

In fact, over 82% have at least tentative plans for travel, with fully 17% saying they plan to take a trip at the start of summer 2021, in June.



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

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)



# Desired Travel Destination Attributes

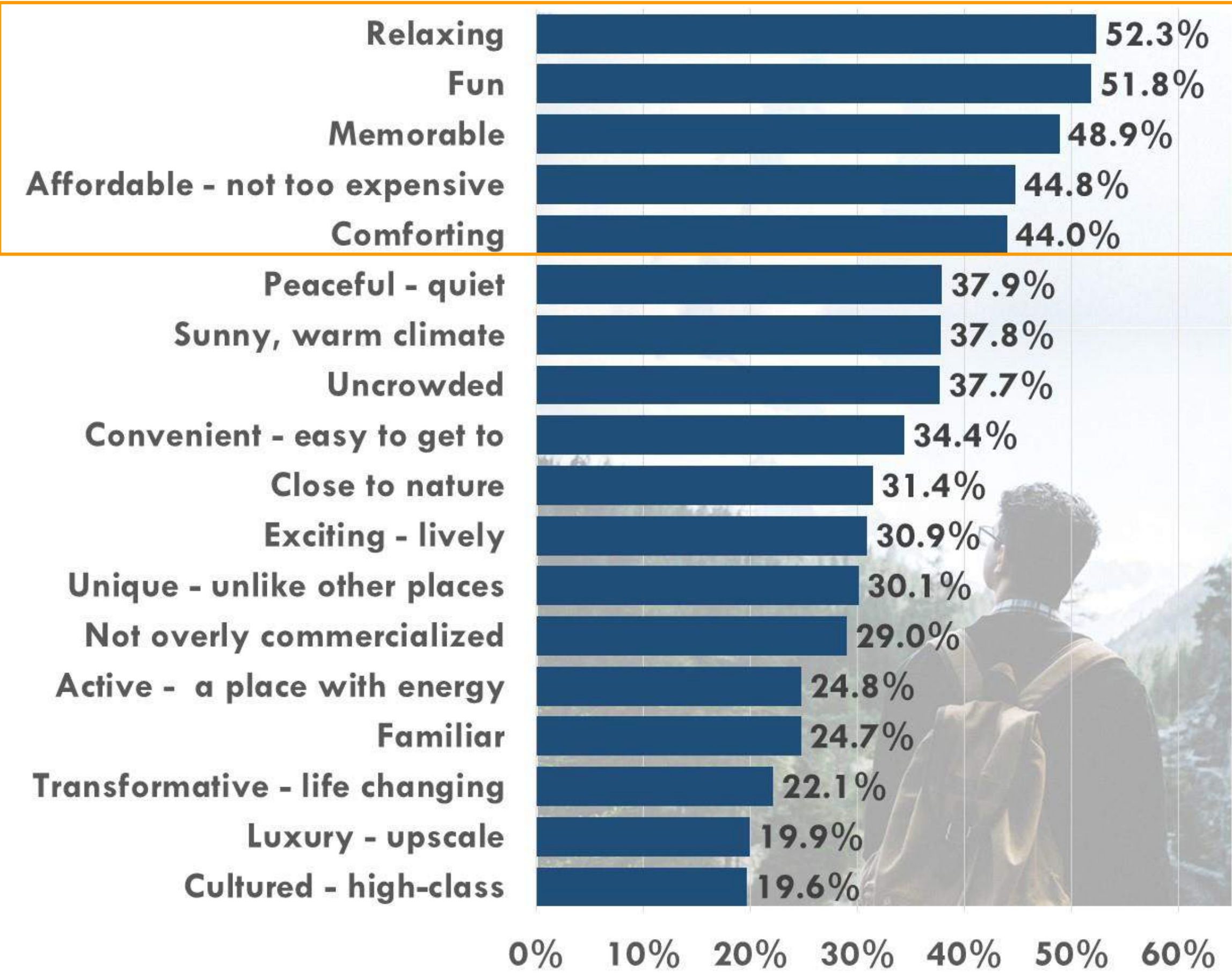
As they look to where they want to travel to over the next year, Americans are most commonly reporting that relaxing, fun, memorable, affordable and comforting are important attributes in the destinations they consider.

**Question:** Think about the types of destinations you would most like to visit in the next twelve (12) months.

Please tell us how you would want the places you visit to be.  
How important is each attribute?

(Base: Wave 37 data. All respondents, 1,205 completed surveys. Data collected November 20-22, 2020)

## DESIRED TRAVEL DESTINATION ATTRIBUTES AS OF NOVEMBER 22<sup>ND</sup>





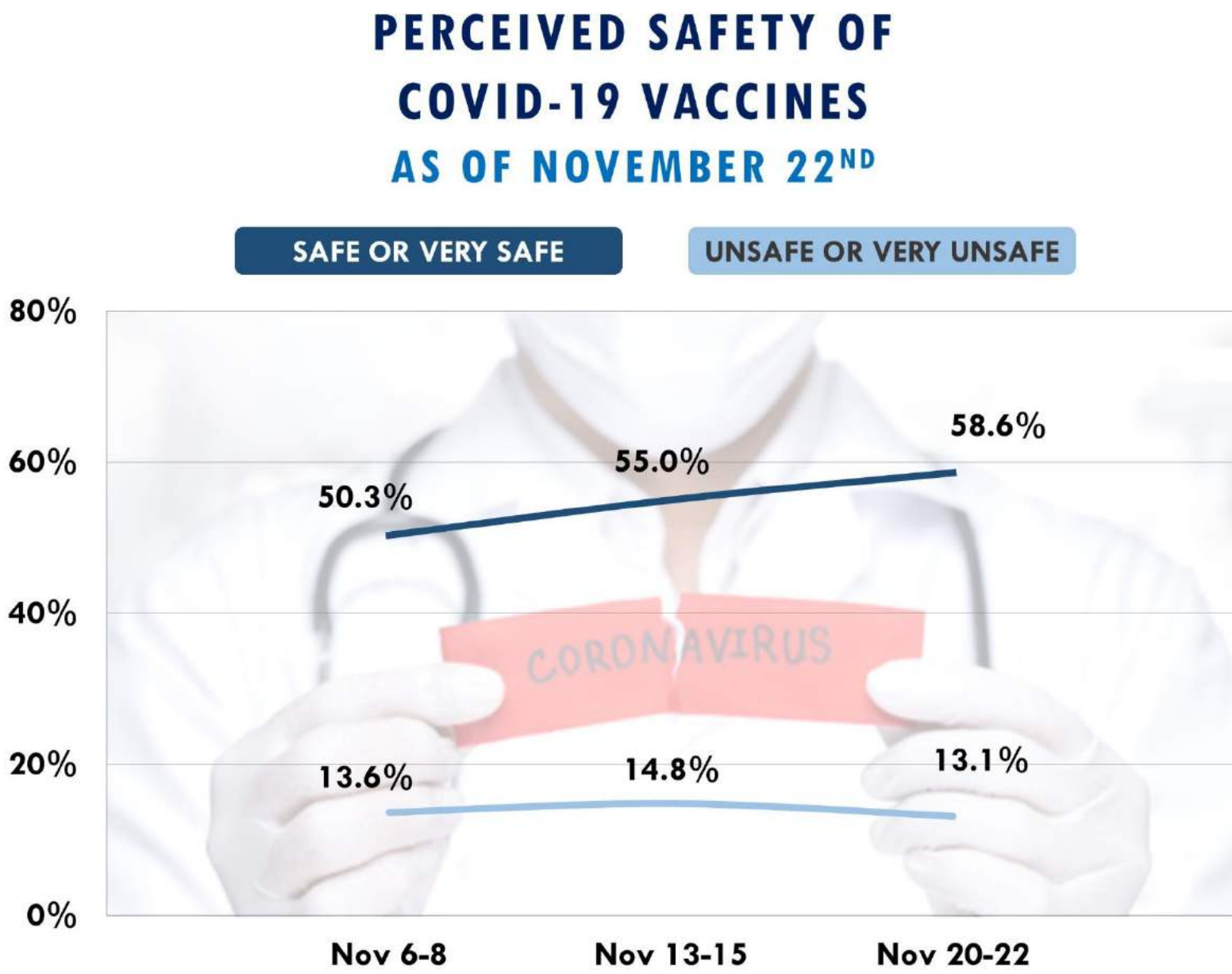
# Vaccines

The recent news about COVID-19 vaccines also has Americans feeling some optimism. While just 28.9% felt it was likely we would have a vaccine developed by the end of 2020 on November 8th, now 57.1% do. This week, 58.6% believe a vaccine that is developed will be safe (up from 50.3% at the beginning of the month) and 46.2% say they definitively would take a vaccine. The latest vaccine news has made 58.1% of American travelers more optimistic about life returning to normal (or near normal) in the next six months. Interestingly, with a COVID-19 vaccine looking more realistic for the near future, more Americans are saying they won't travel without a vaccine—46.6%, up from 38.2% at the start of November.



**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)

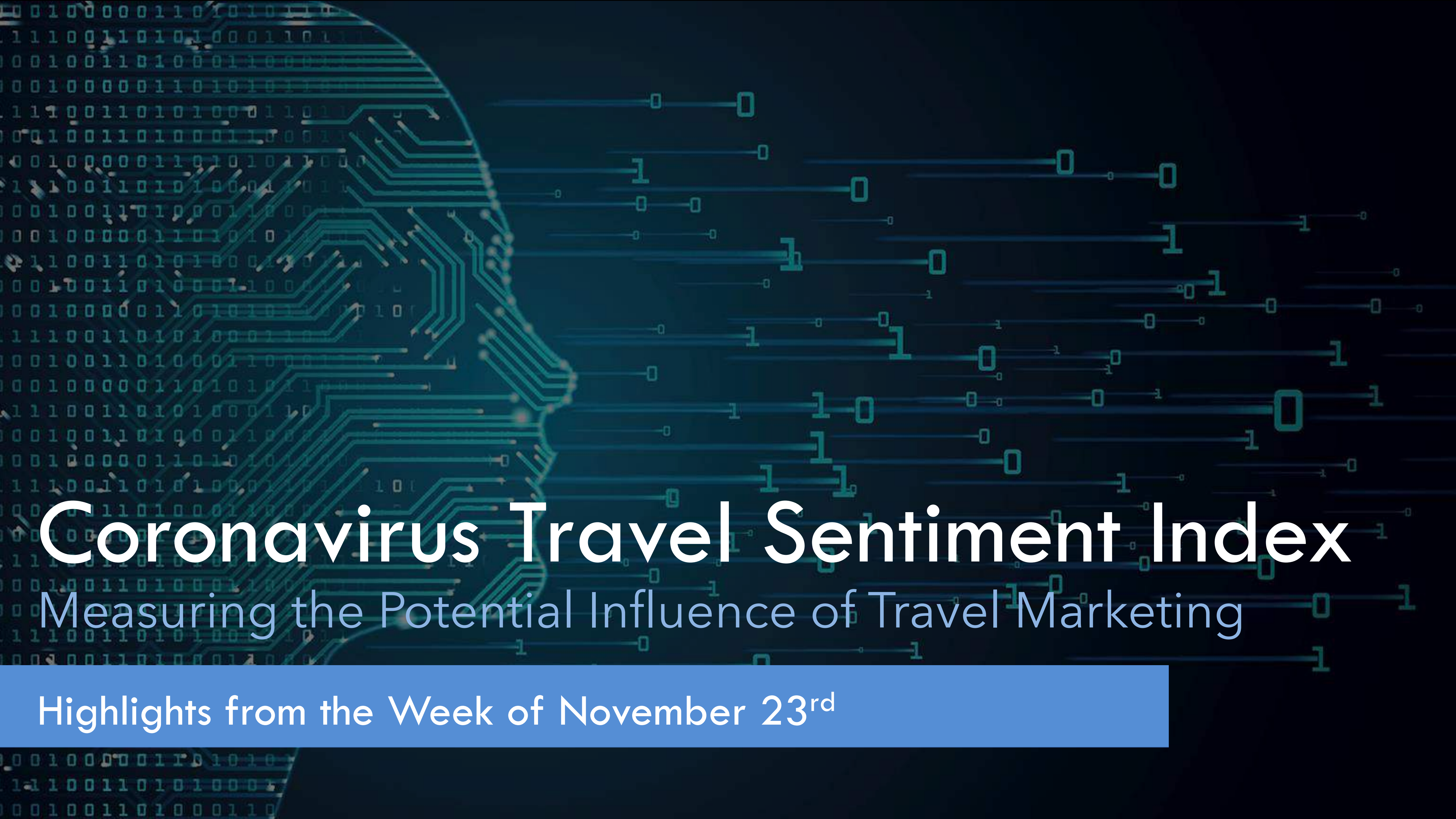
(Base: Waves 27, 30 an 35-37 data. All respondents, 1,205, 1,203, 1,205, 1,206 and 1,205 completed surveys.)



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

(Base: Waves 35-37 data. All respondents, 1,205 completed surveys.)





# Coronavirus Travel Sentiment Index

Measuring the Potential Influence of Travel Marketing

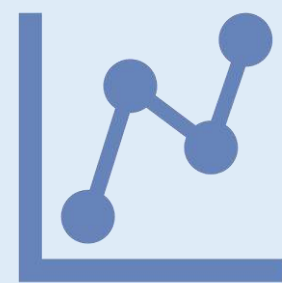
Highlights from the Week of November 23<sup>rd</sup>



# 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.

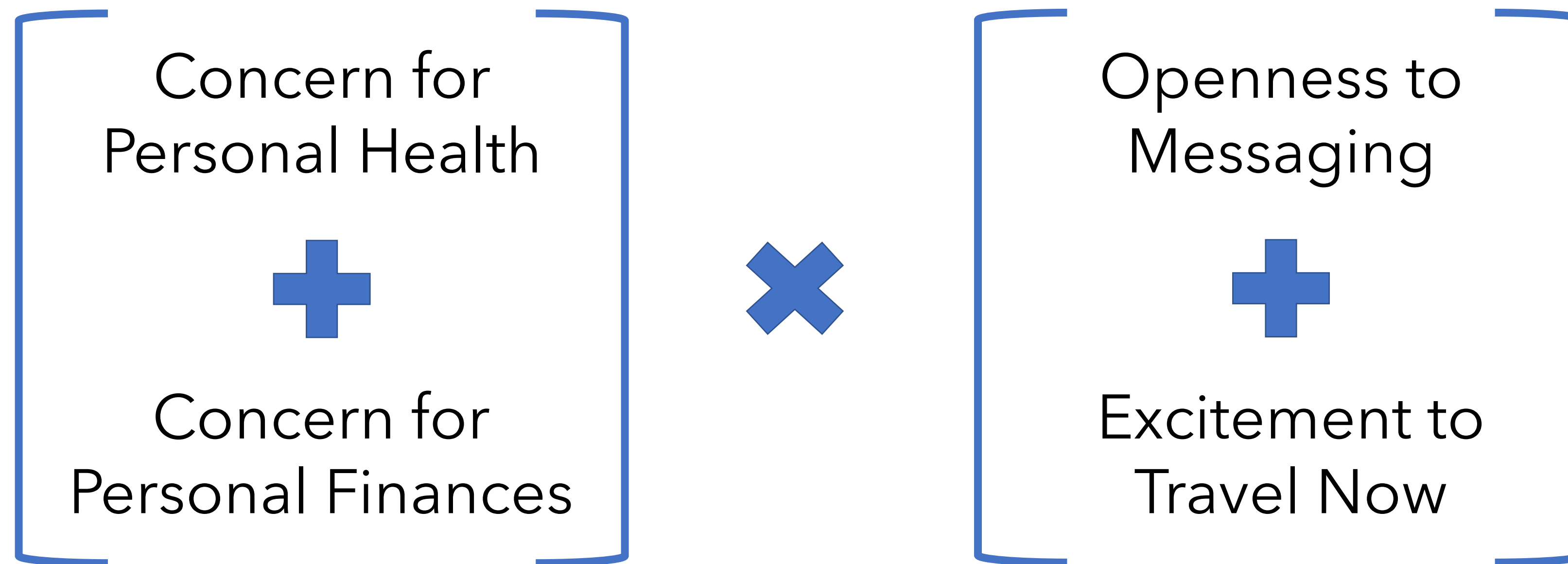


The goals are to identify:

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



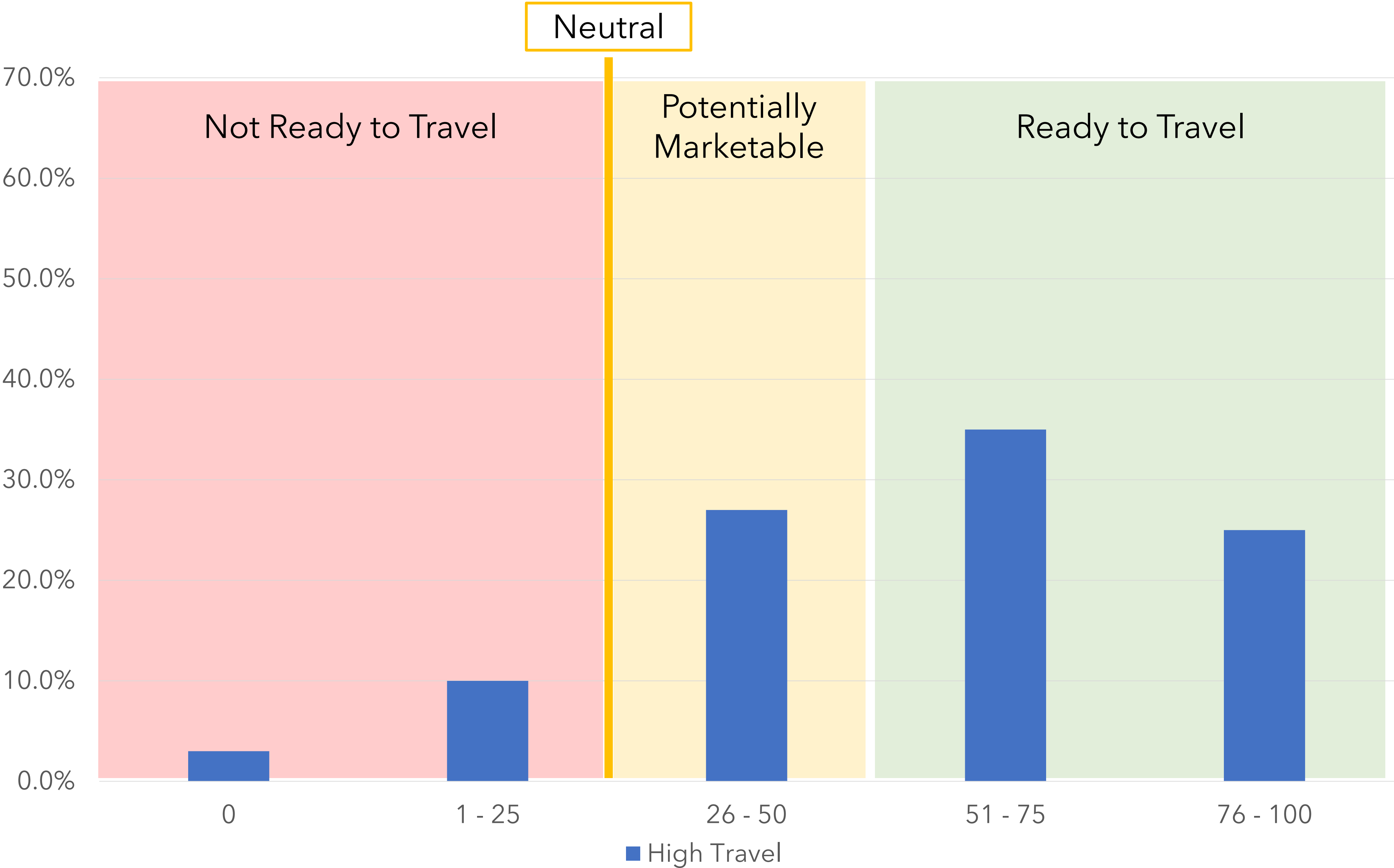
# Predictive Index Formula



\*Normalized to a 100pt scale



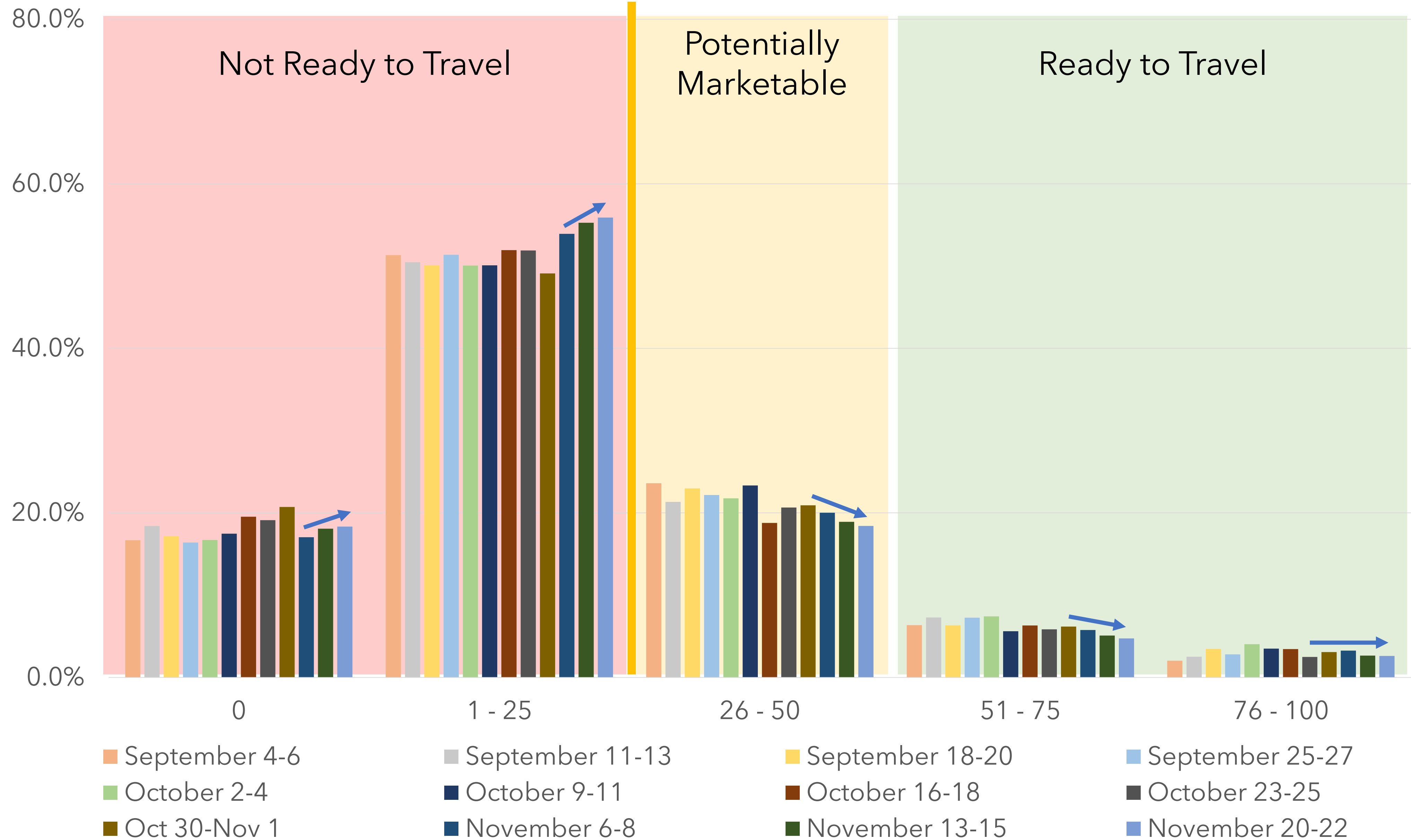
# Healthy Travel Outlook



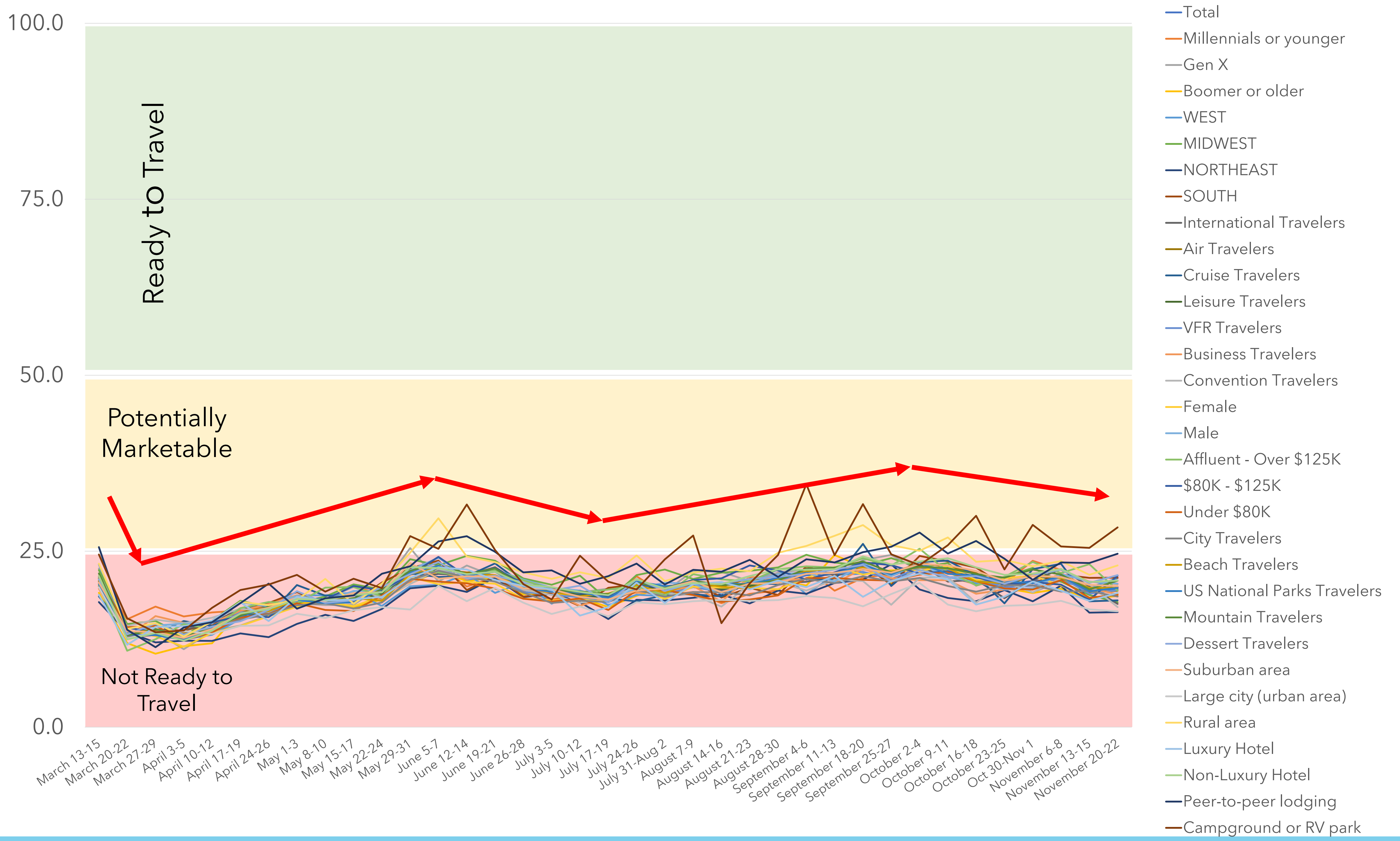


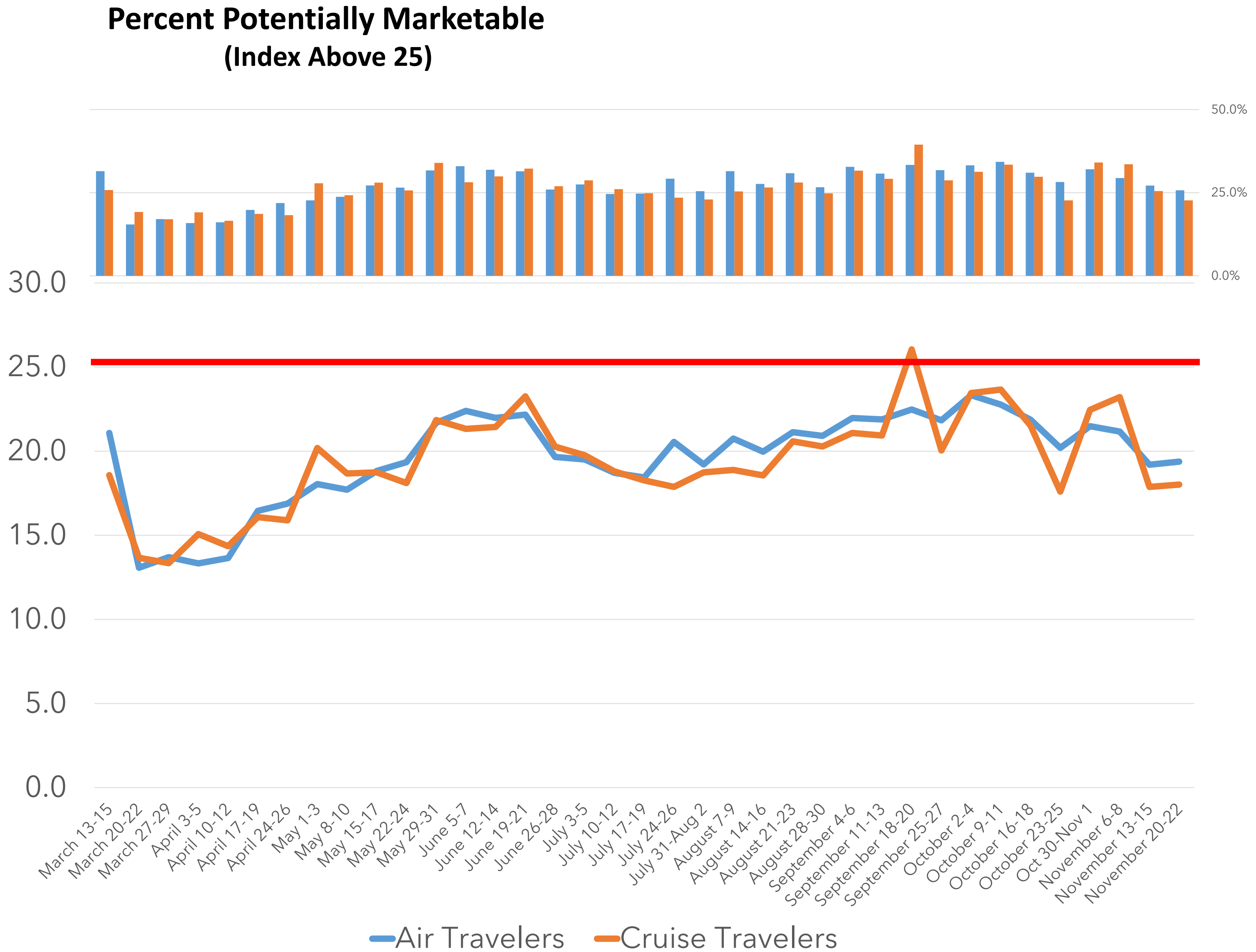
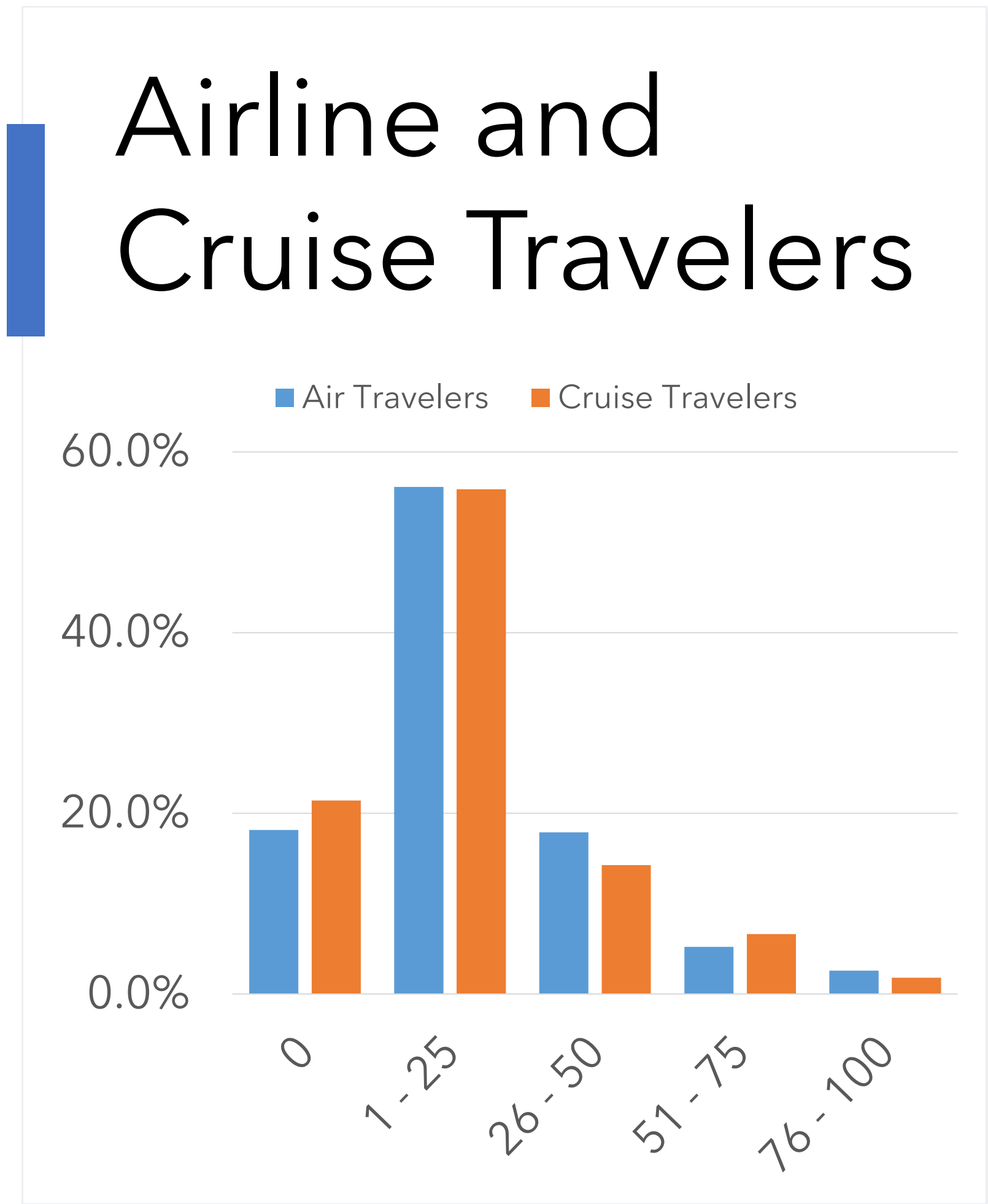
# Travel Outlook

Neutral

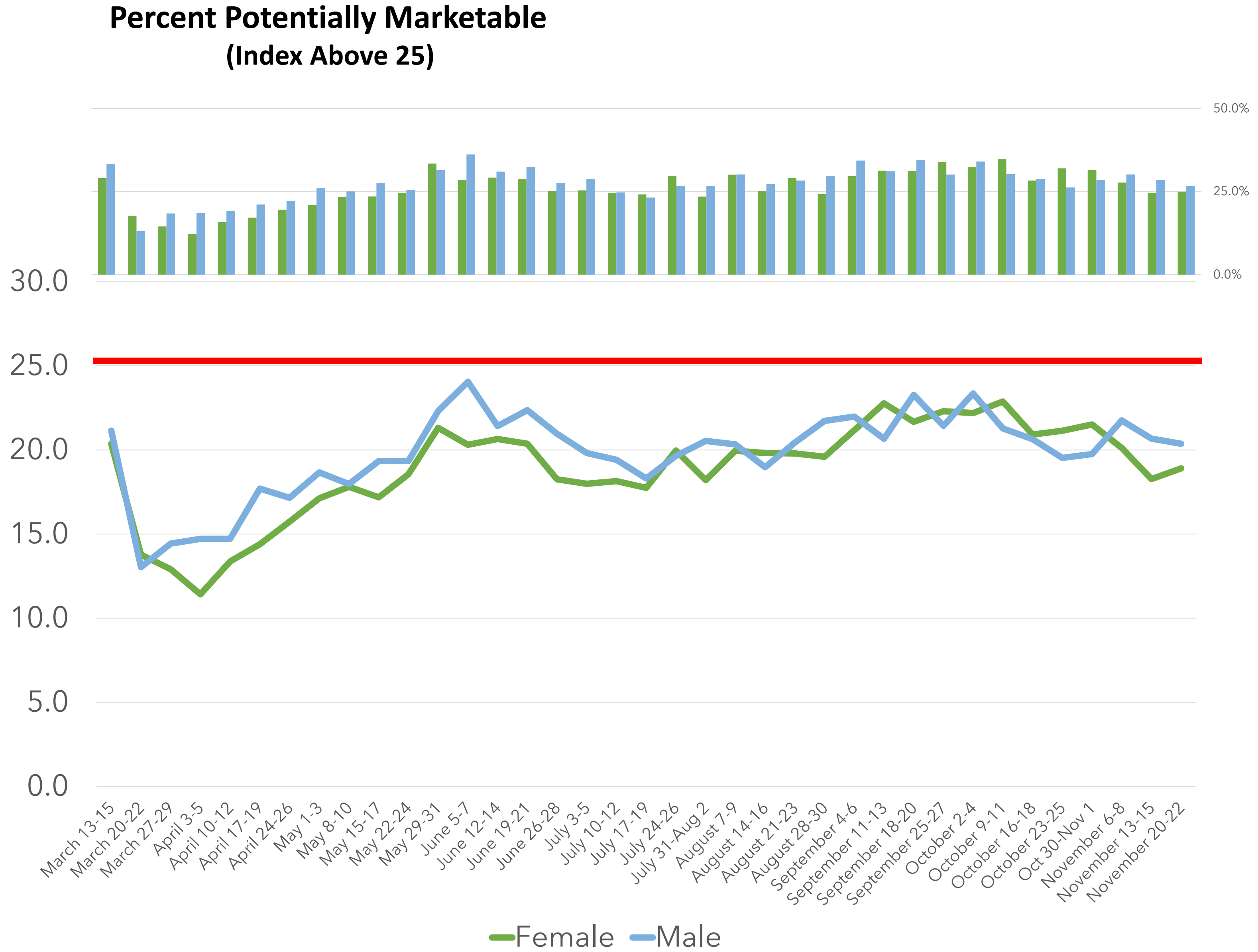
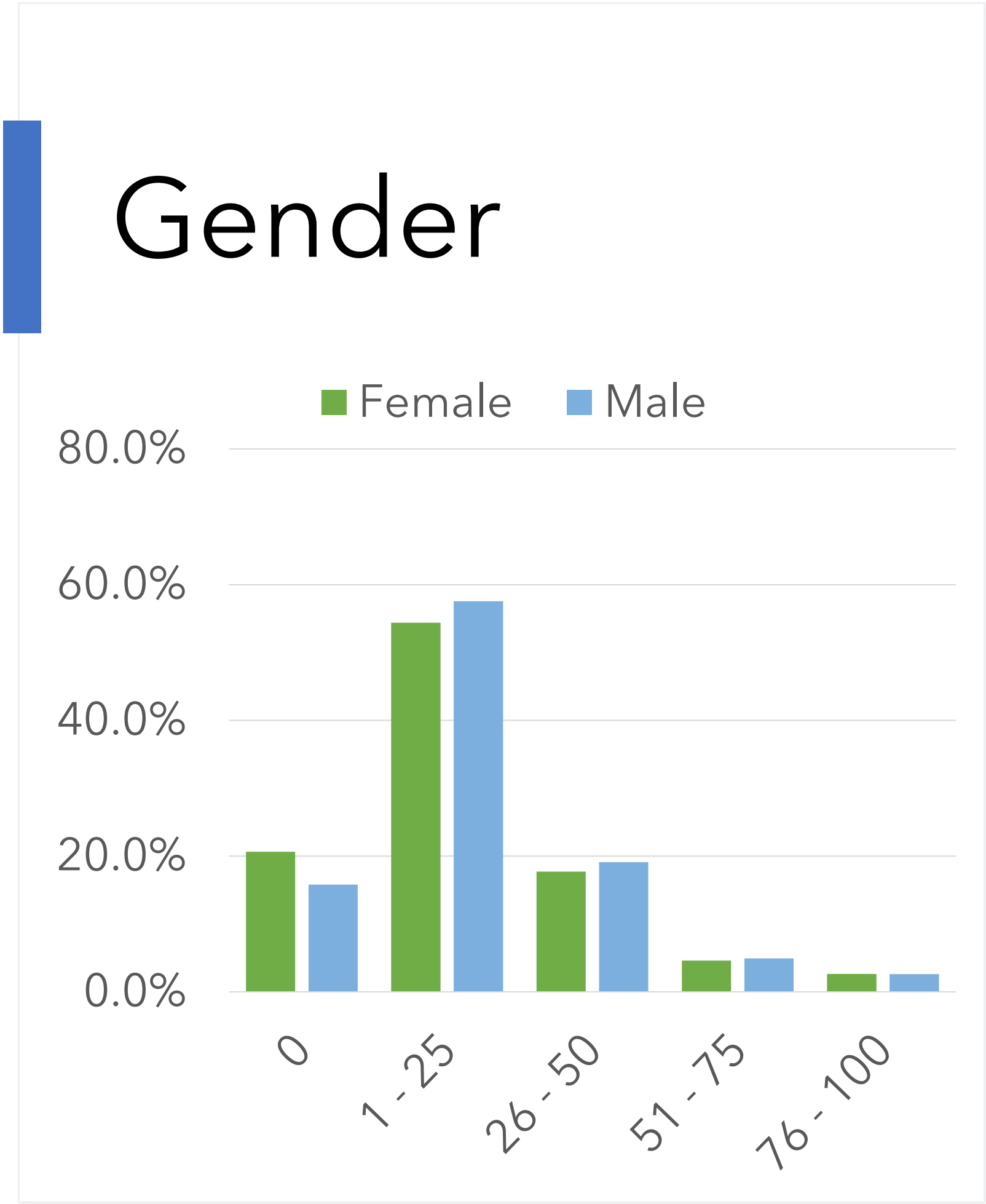






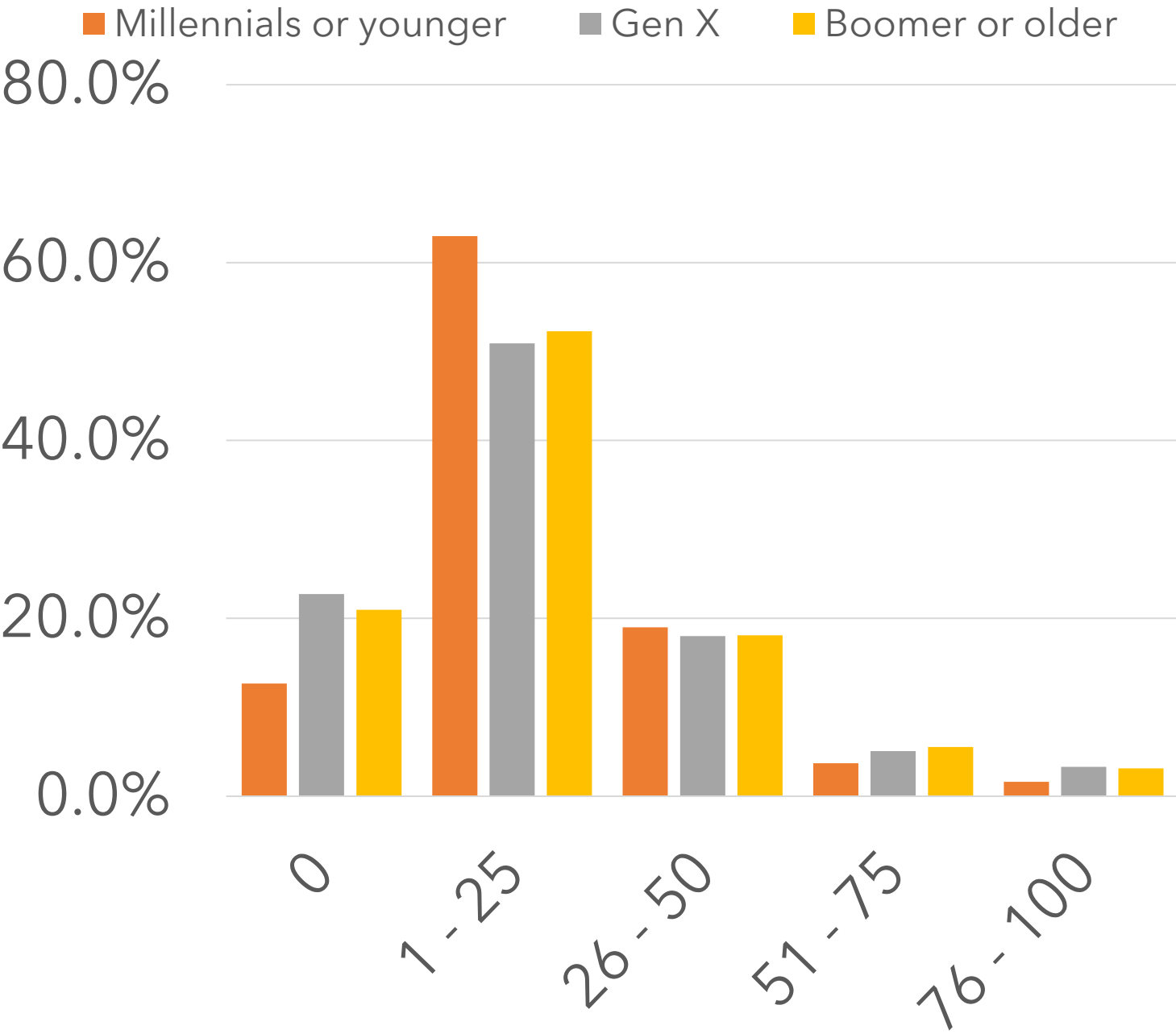




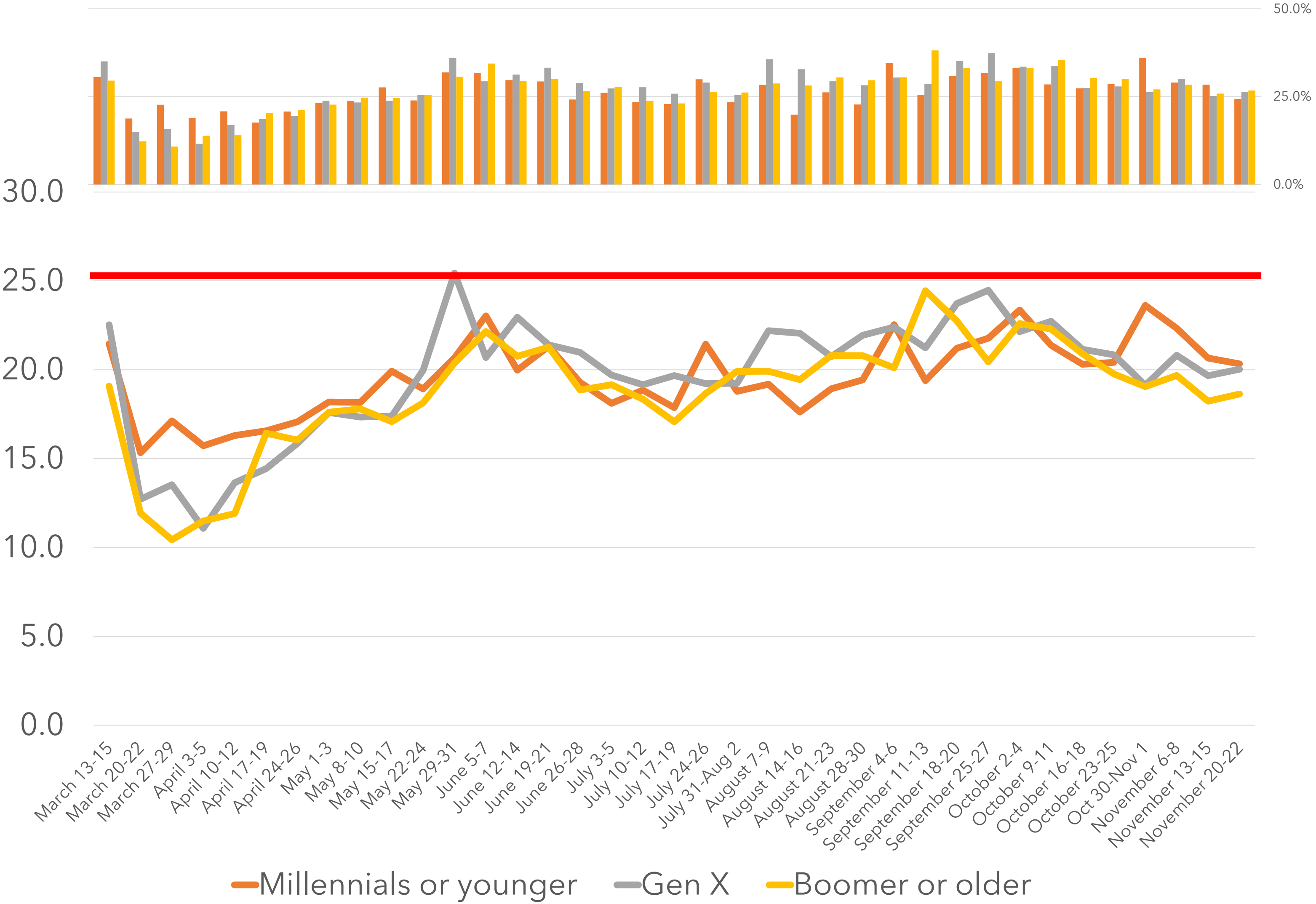




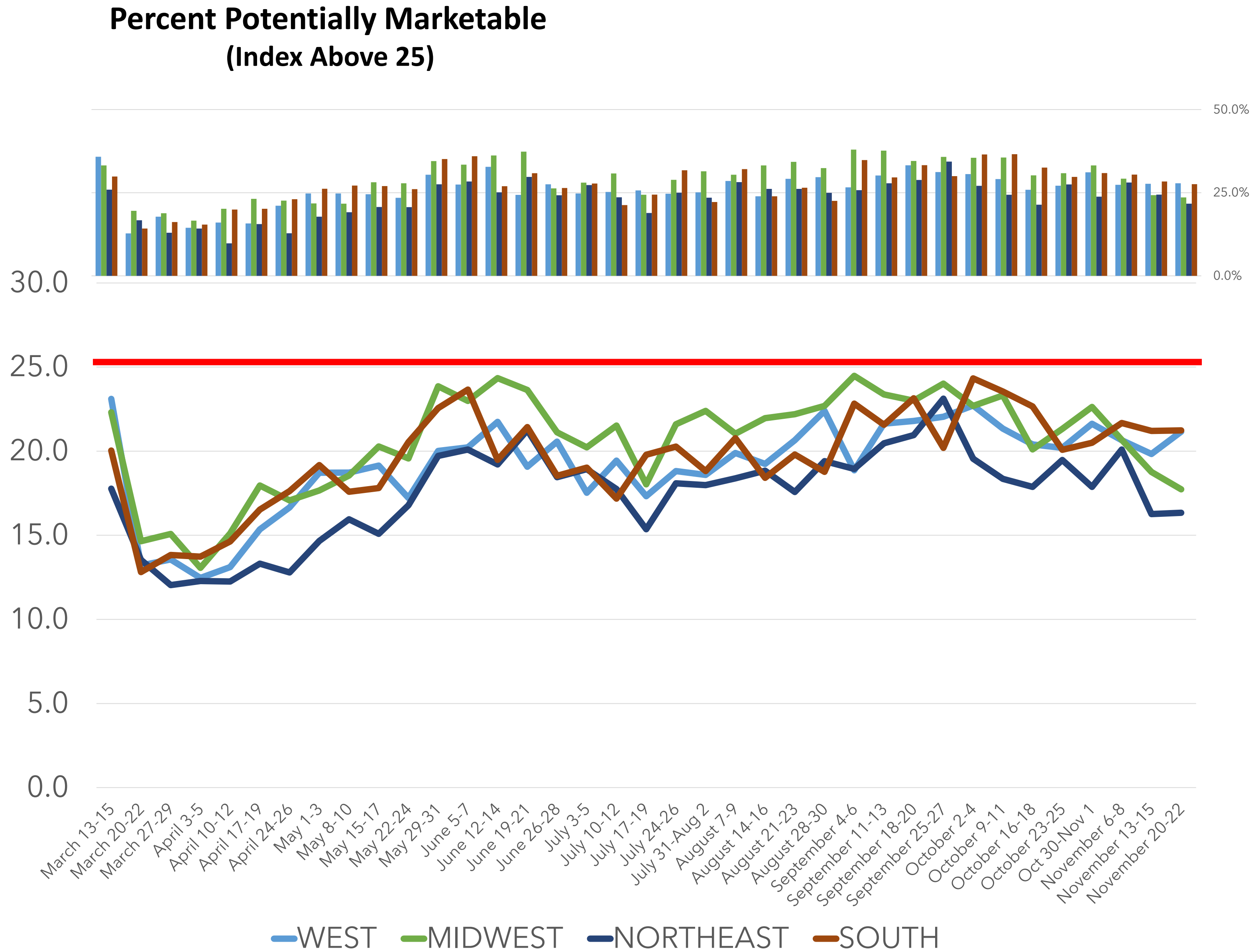
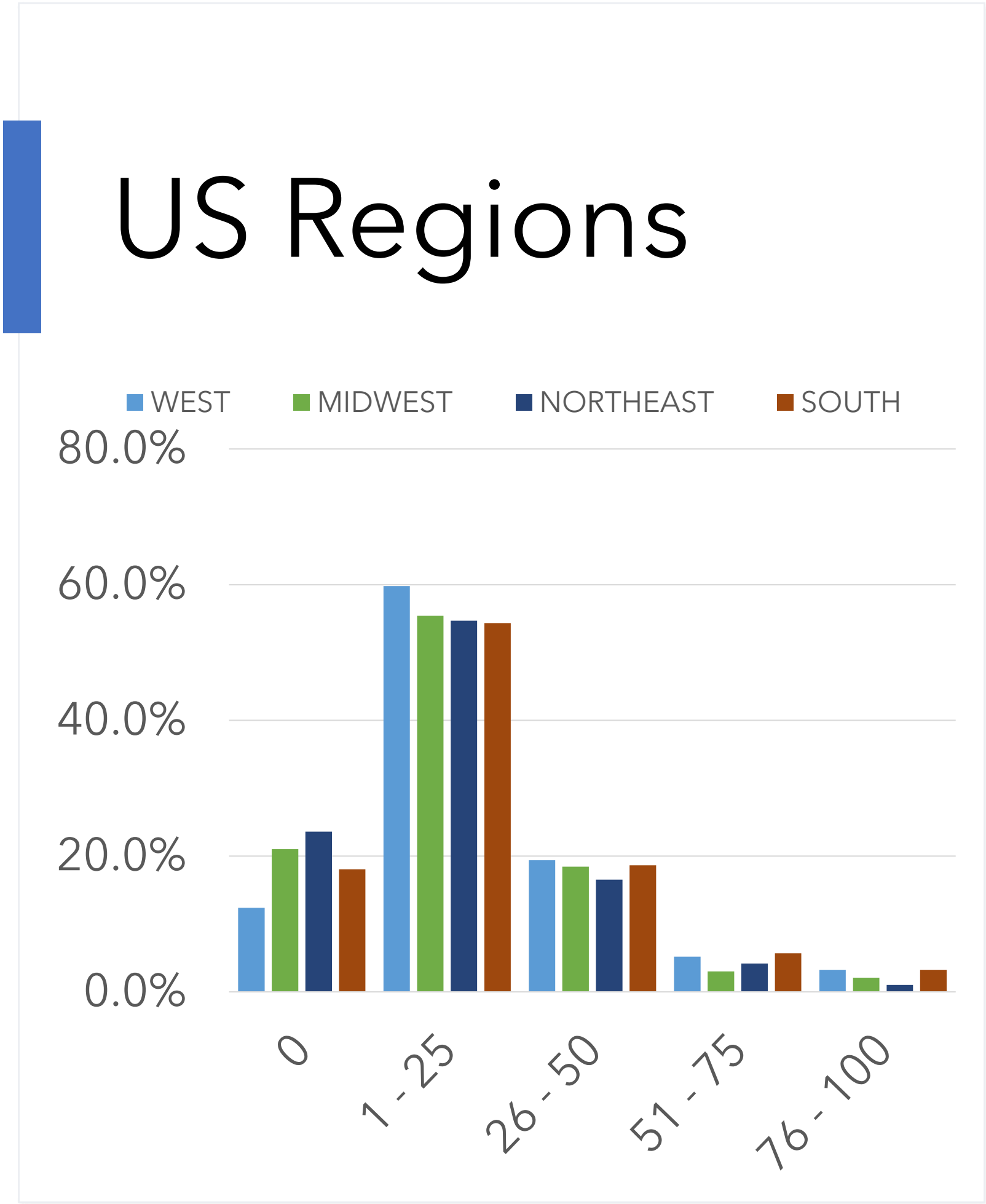
# Generation



## Percent Potentially Marketable (Index Above 25)

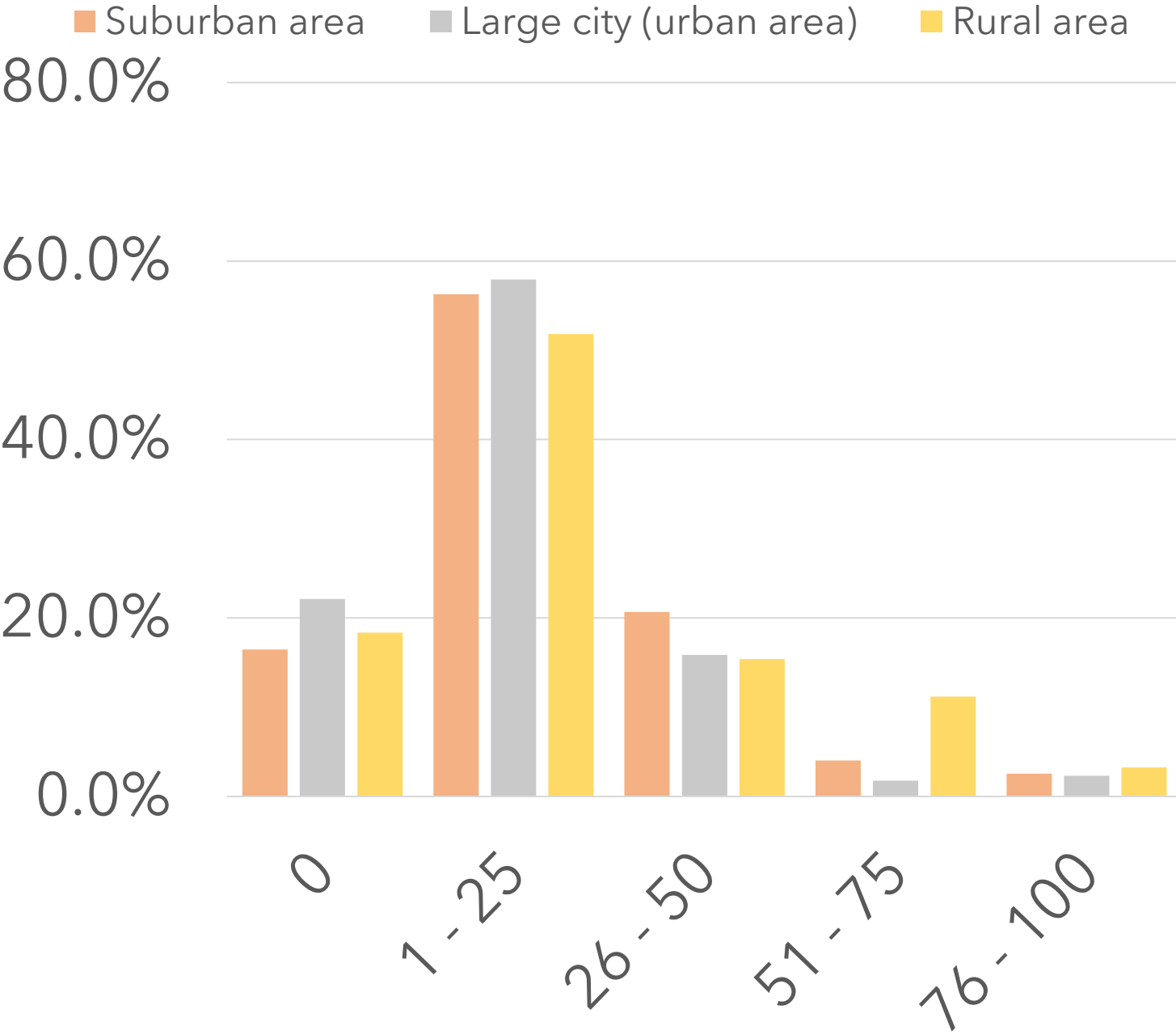




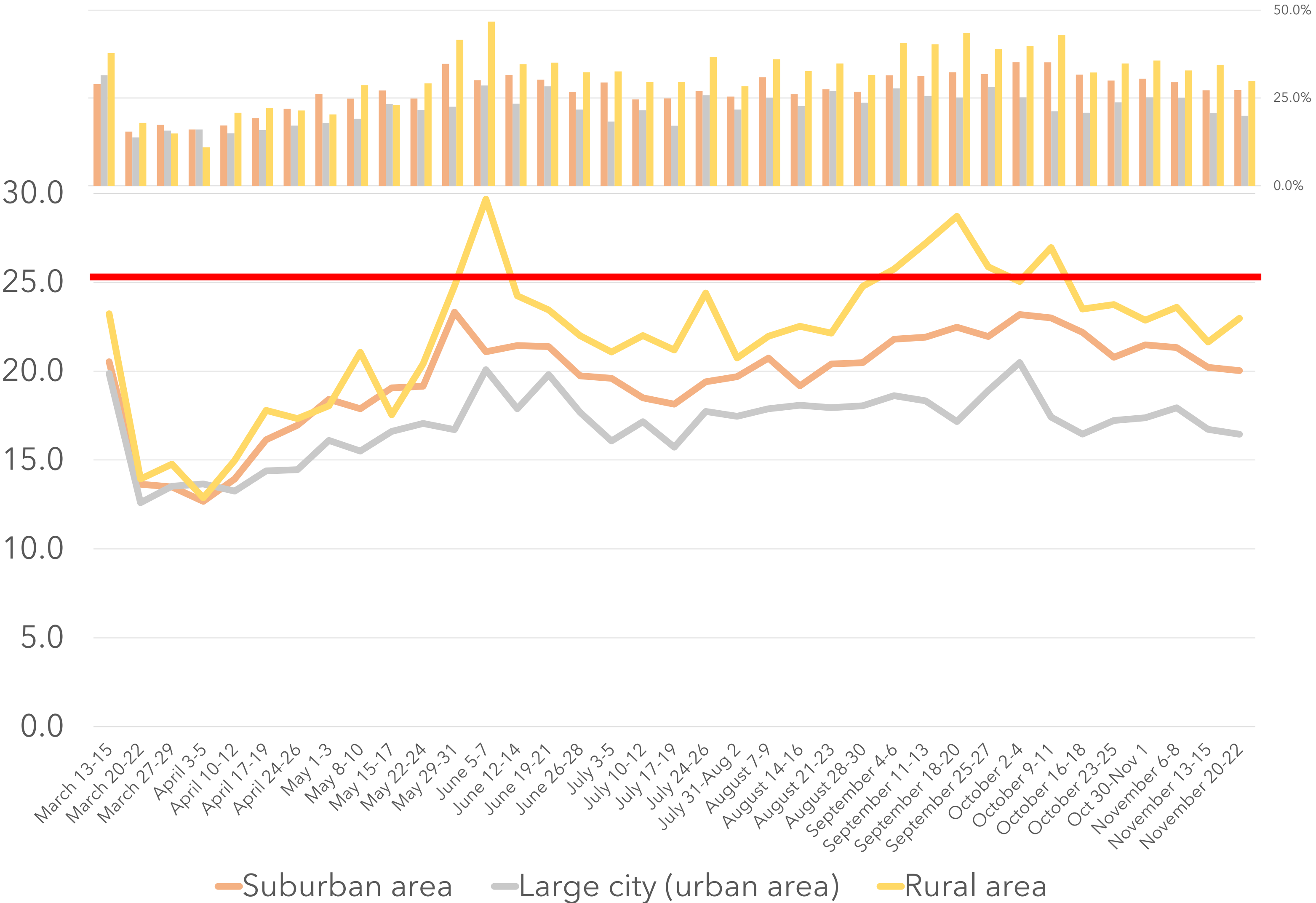




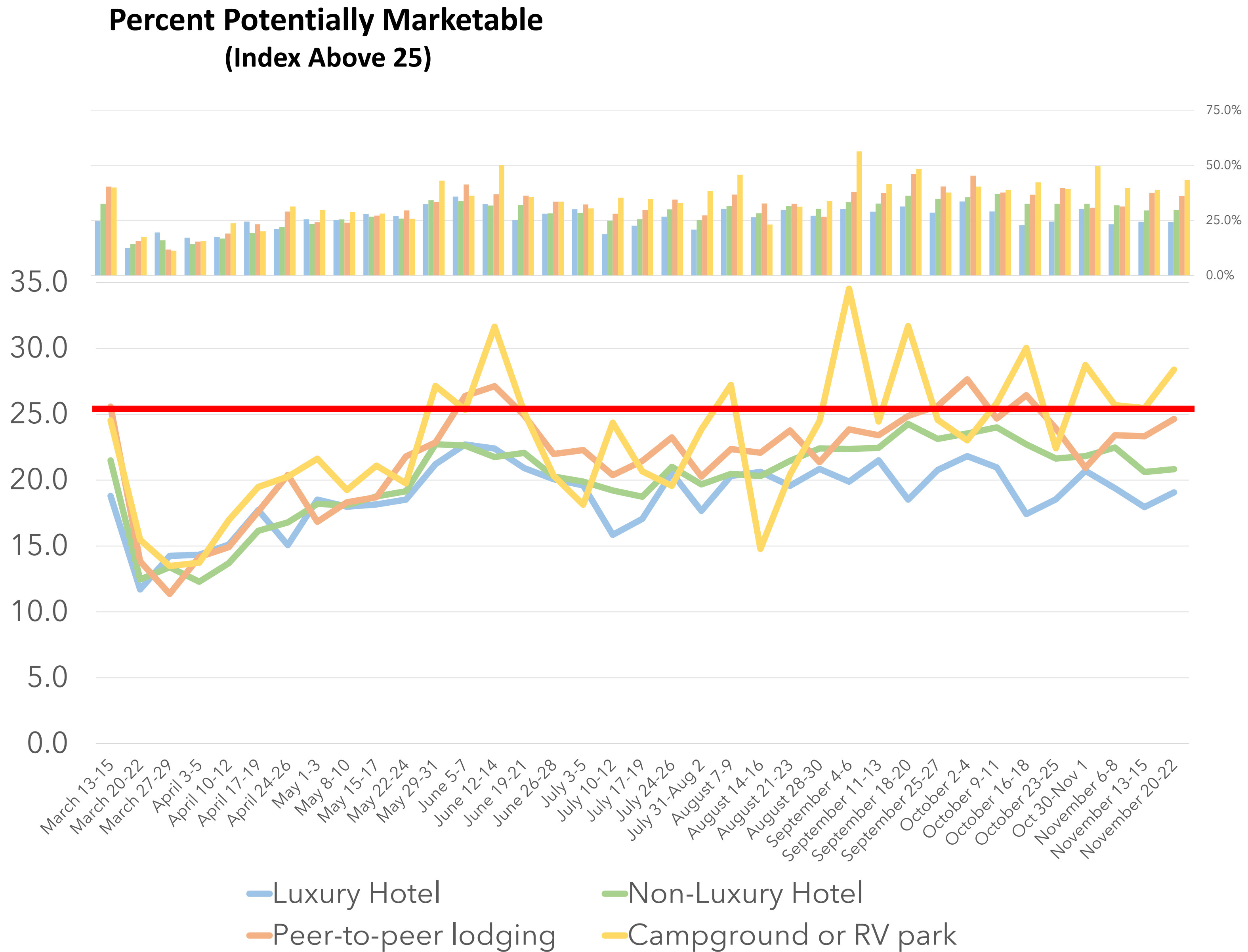
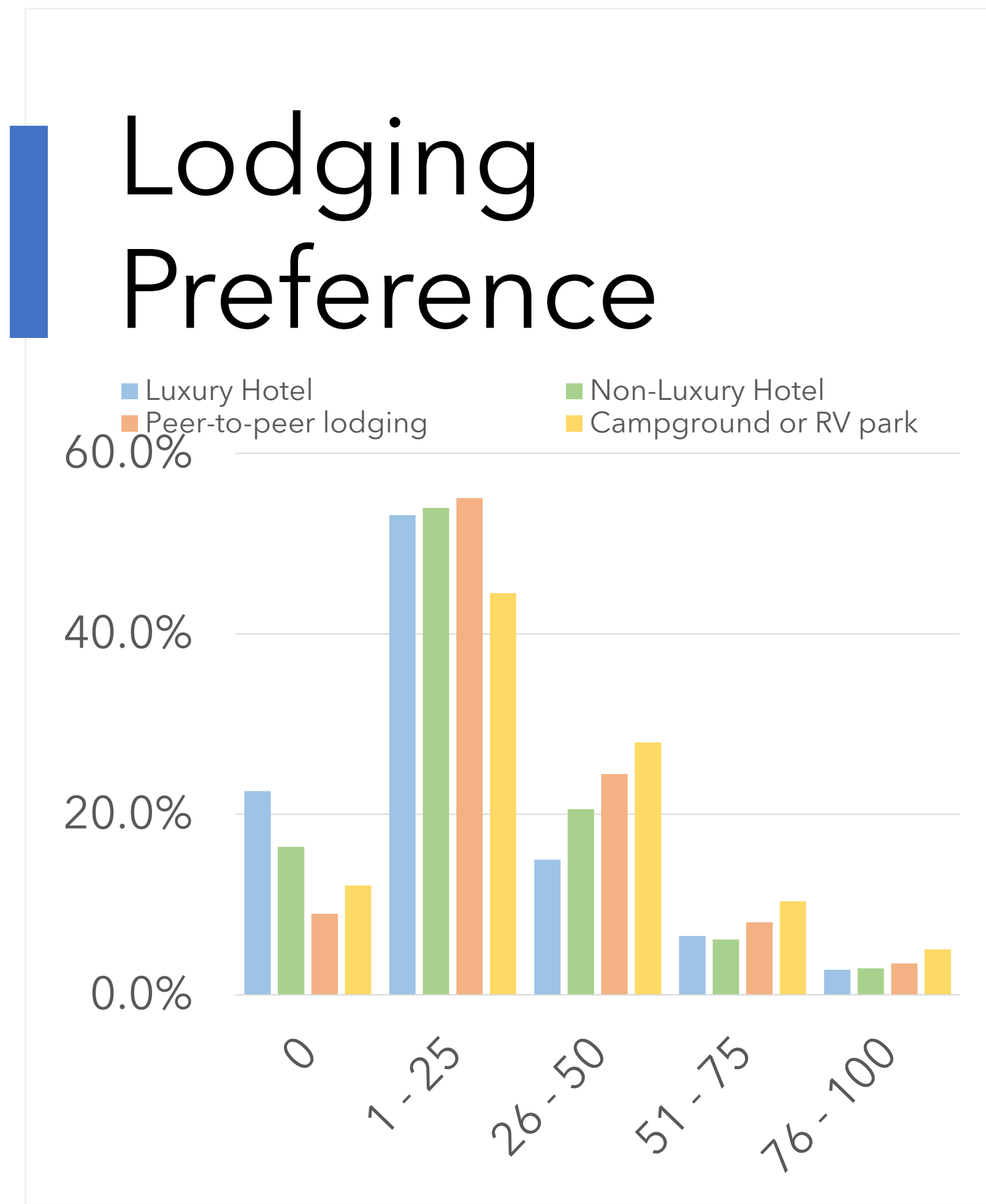
# Residence Type



## Percent Potentially Marketable (Index Above 25)











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