

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF November 30th, 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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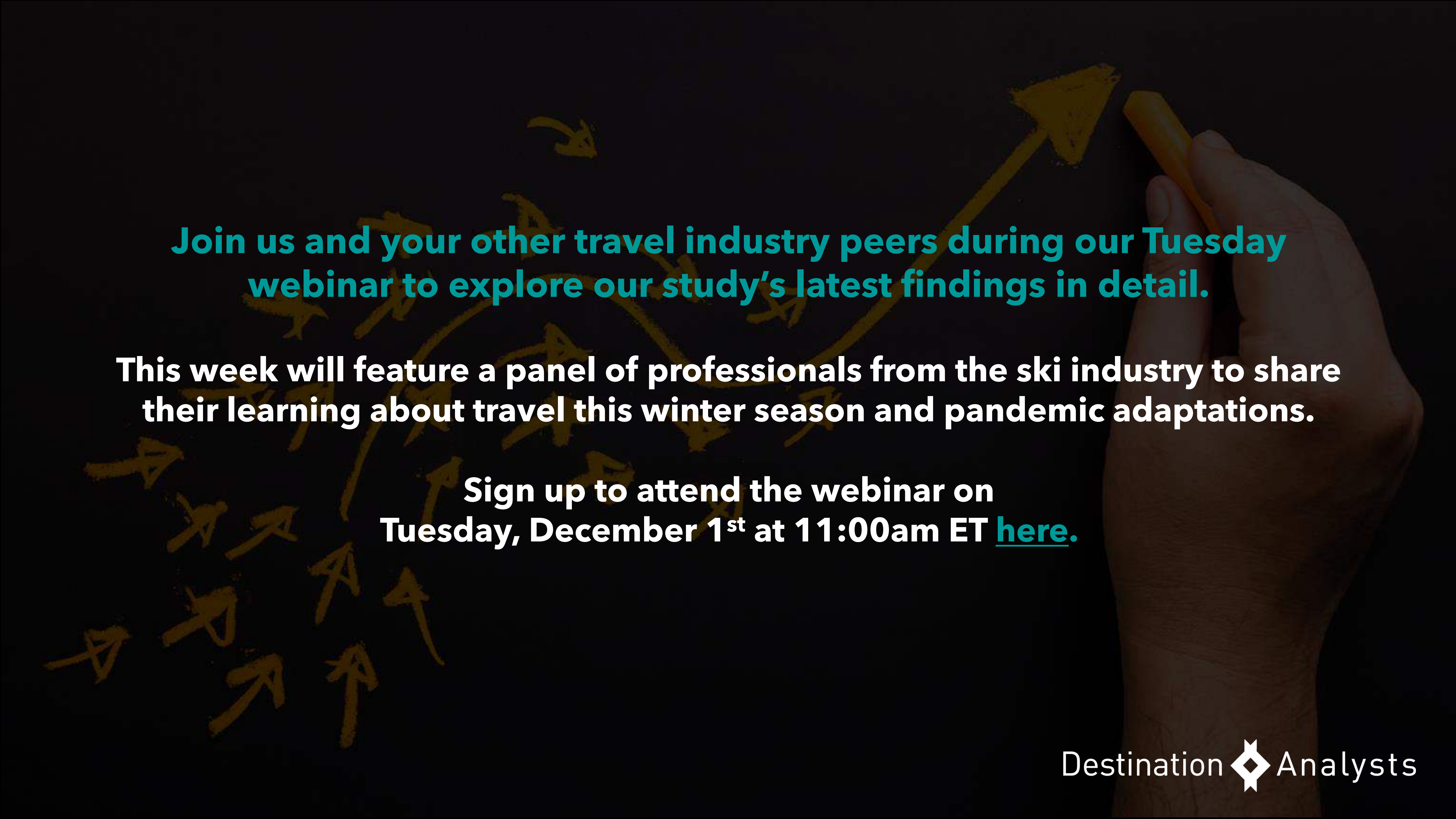
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Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week will feature a panel of professionals from the ski industry to share their learning about travel this winter season and pandemic adaptations.

**Sign up to attend the webinar on
Tuesday, December 1st at 11:00am ET [here](#).**

Key Findings for the Week of November 30th

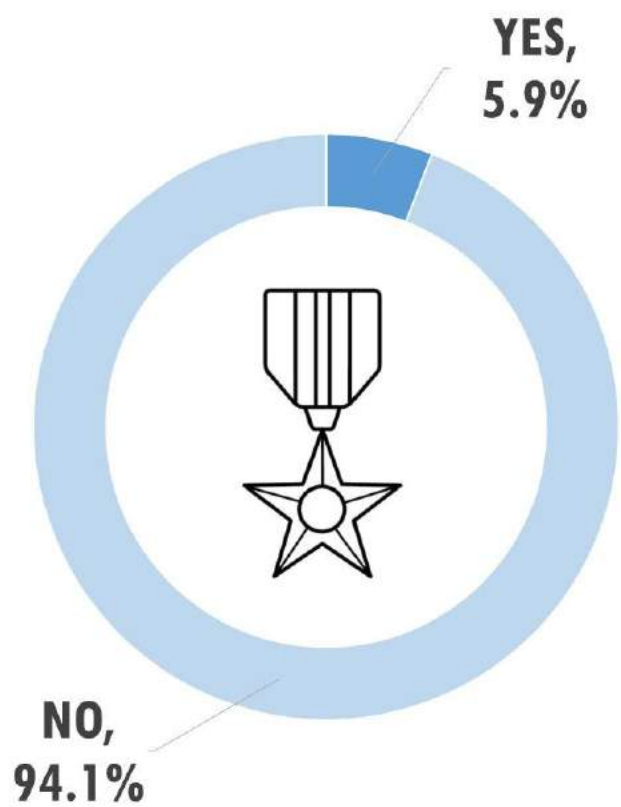
Please cite **Destination Analysts** when using or distributing this data

Holiday Travel During the COVID-19 Pandemic

With the fourth major travel holiday of the pandemic passing amongst a litany of restrictions and warnings, the burning question is: did Americans take trips for Thanksgiving 2020? Nearly 14% said they did—a rate similar to Labor Day weekend. About half of these Thanksgiving travelers plan to quarantine for some period after their trip while the other half will resume their normal activities. As we look ahead to December, nearly one-in-five Americans say they plan to take a Christmas holiday trip.

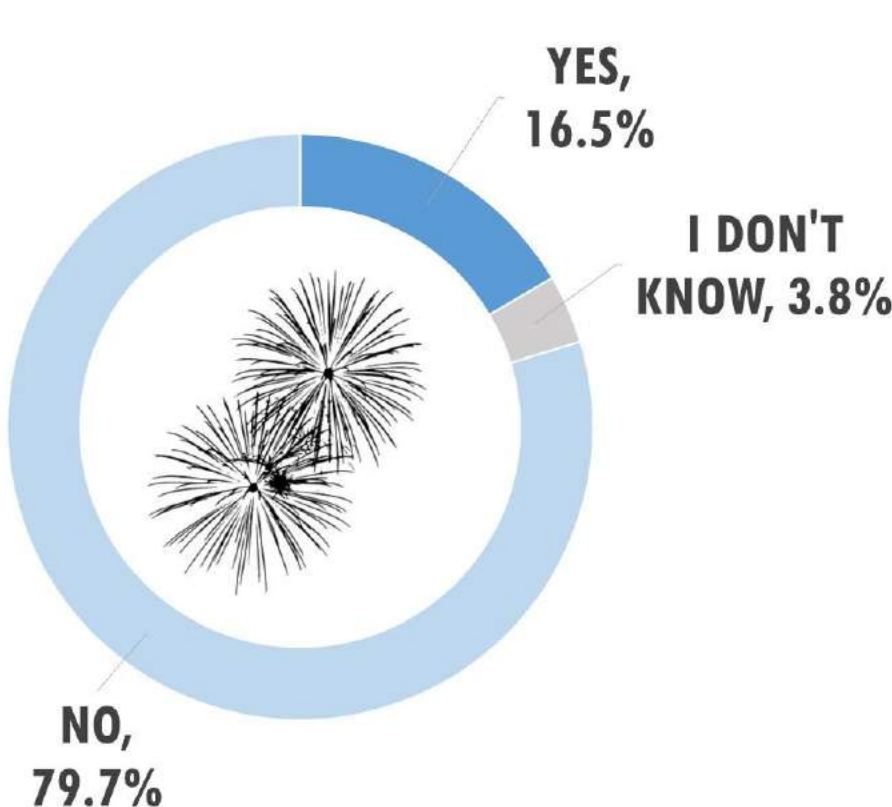
HOLIDAY TRAVEL DURING THE COVID-19 PANDEMIC: MEMORIAL DAY | FOURTH OF JULY | LABOR DAY | THANKSGIVING

Memorial Day Weekend



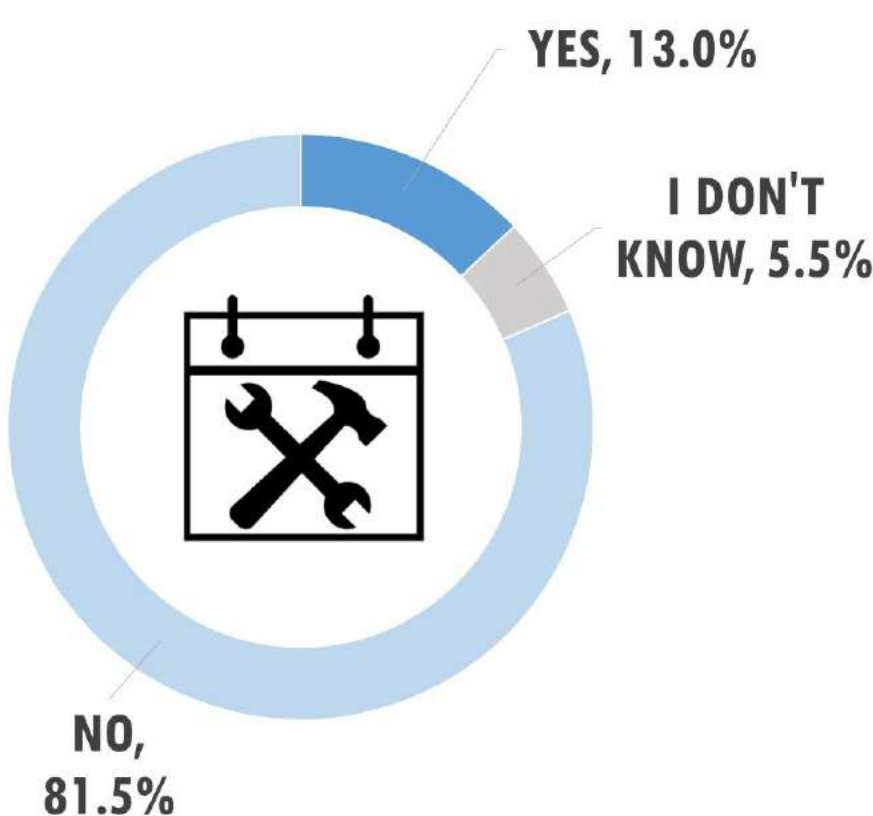
(Base: Wave 11. All respondents, 1,223 completed surveys. Data collected May 22-24, 2020)

Fourth of July Weekend



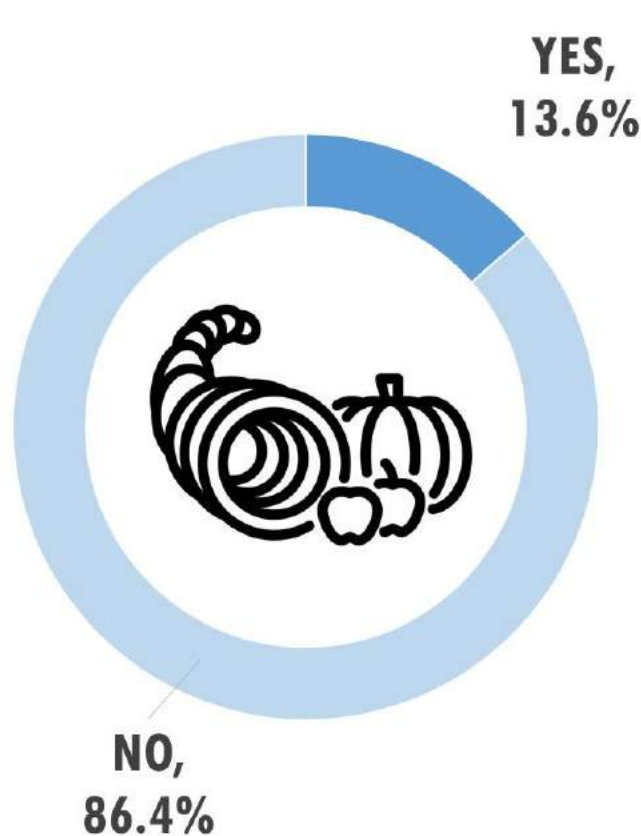
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

Labor Day Weekend



(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)

Thanksgiving



(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

High Concerns About COVID-19's Impact

In terms of how Americans are feeling about the virus, many emotions remain largely unchanged.

Anxieties about personally or loved ones' contracting the virus and the pandemic's impact on personal and national economics are in an elevated but stable period that have not reached the peak levels seen during the two prior surges in March and July. Over 60% of Americans continue to believe the pandemic is going to get worse in the next month.

NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT AS OF NOVEMBER 30TH



NATIONAL
ECONOMY



HEALTH OF
FRIENDS & FAMILY

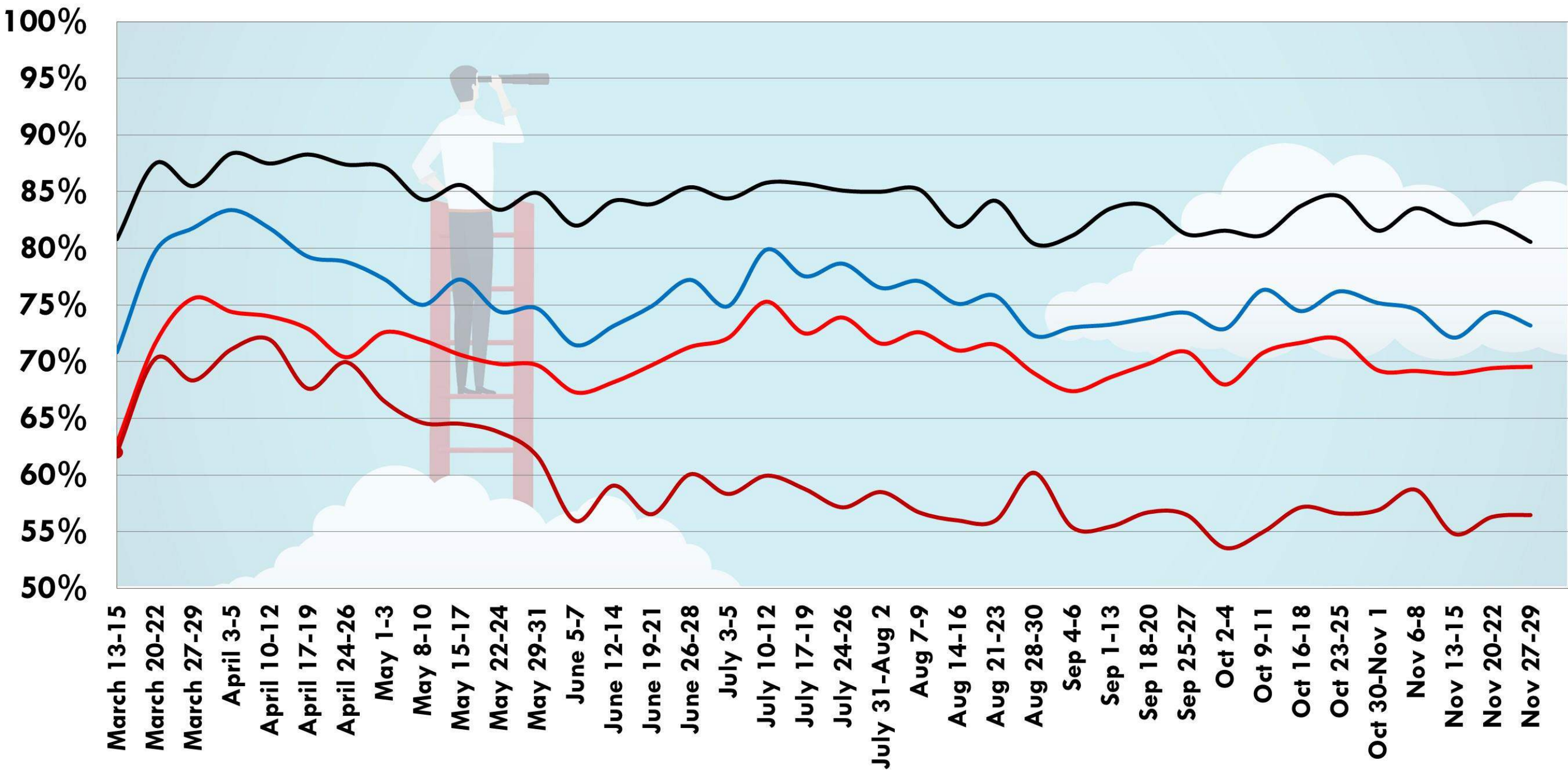


PERSONAL
HEALTH



PERSONAL
FINANCES

(% ANSWERING 10-6 ON 11-POINT SCALE)



Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the/your_____?

(Base: Waves 1-38. 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 and 1,205 completed surveys.)

Openness to Travel Inspiration

Such concerns are still impacting Americans' current travel marketability.

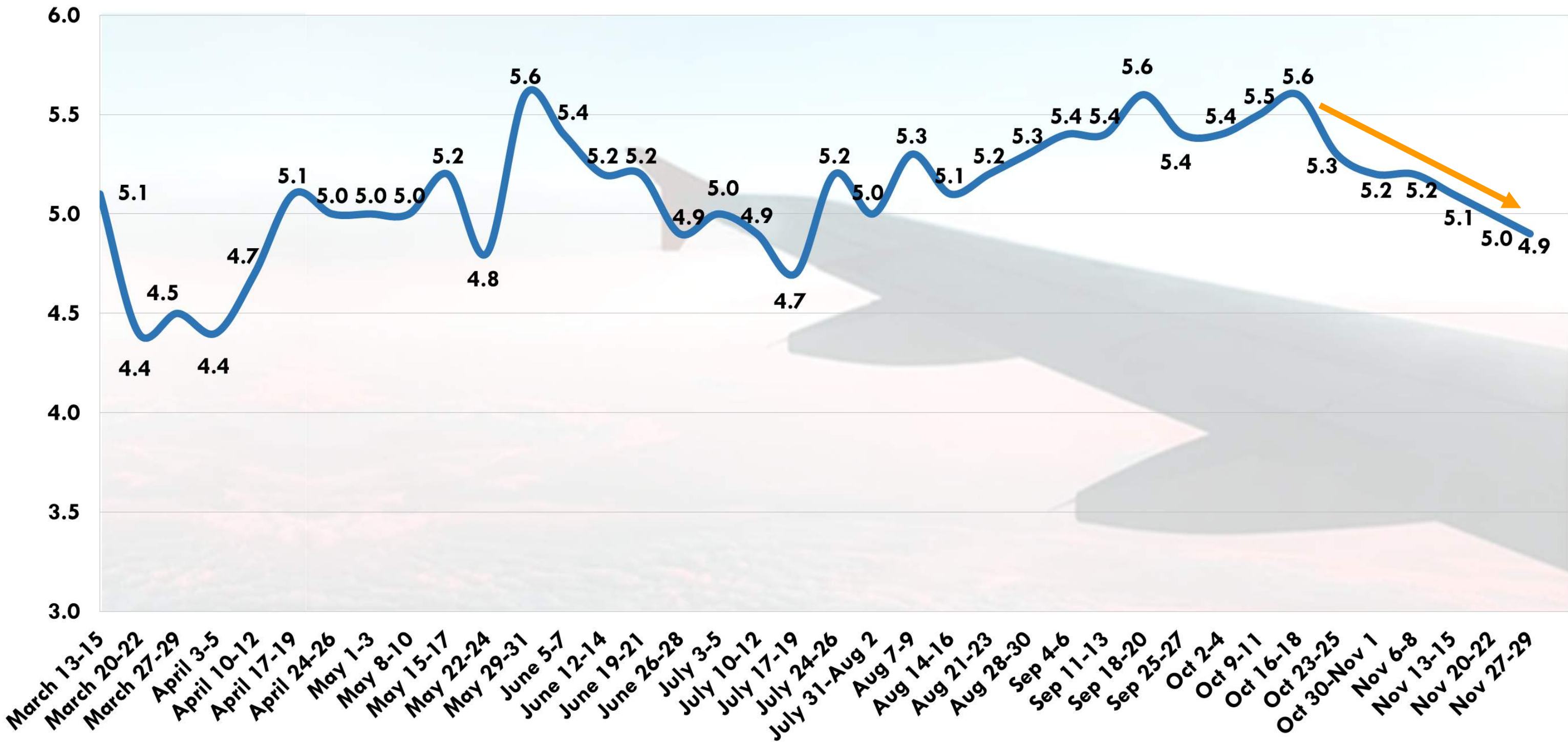
Americans' openness to travel inspiration has been on a steady decline since October 18th, when it hit a pandemic peak, but is now at 4.9 on a 0-11 scale. This week, fully half of American travelers say they have lost their interest in traveling for the time being, and 62.0% say if they were to travel right now, they wouldn't be able to fully enjoy it.

OPENNESS TO TRAVEL INSPIRATION

MARCH 13 – NOVEMBER 29



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?

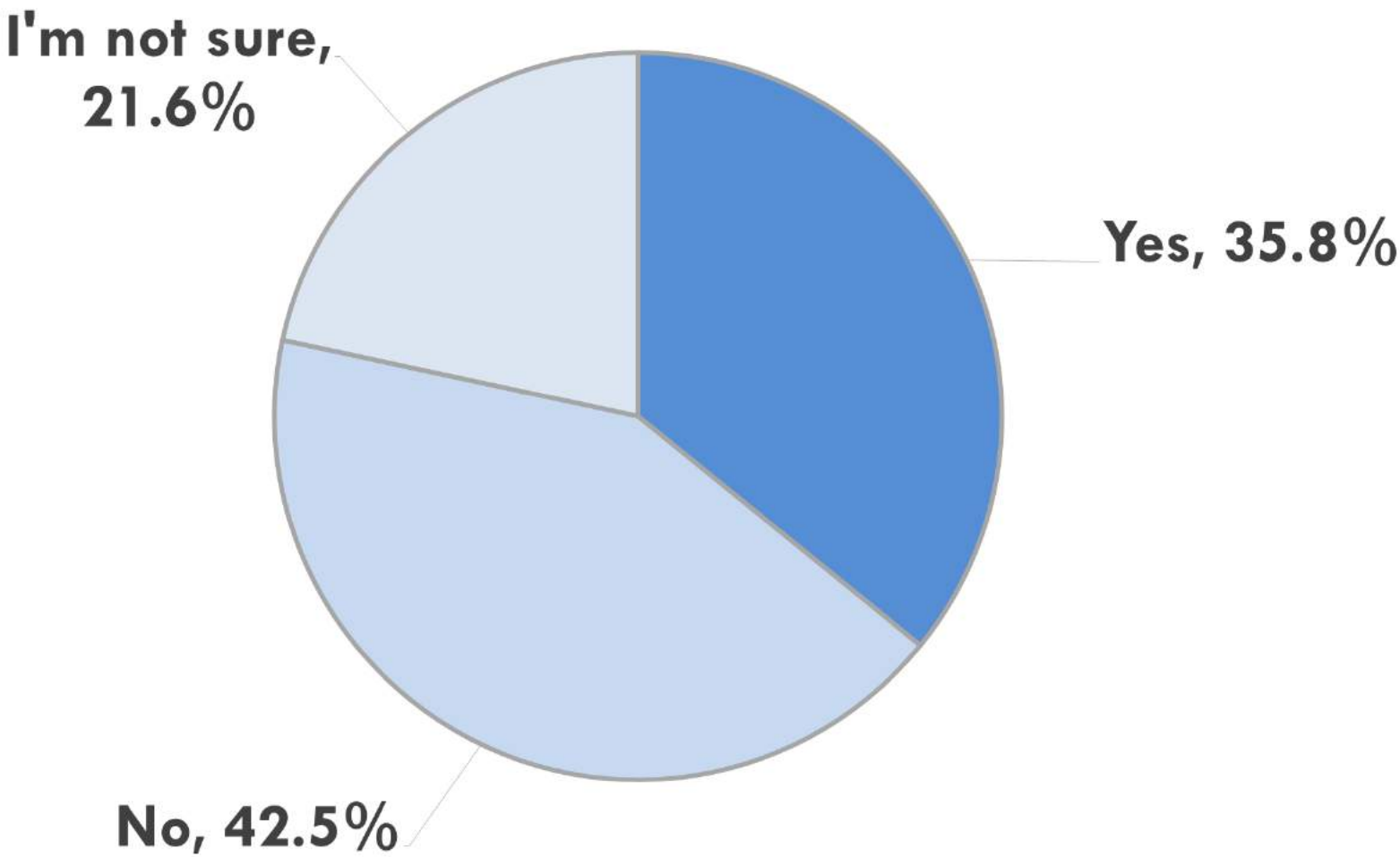
(Base: Waves 1-38. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205 and 1,205 completed surveys.)

COVID-19 Related Destination Media Coverage Causing Discomfort Visiting

The focus of some recent news stories on pandemic behaviors in specific travel destinations is also acting as a sentiment depressant.

In the past month, 35.8% of Americans report they have seen one or more COVID-19 related reports in the media about travel destinations where people were behaving in a manner that would make them feel uncomfortable visiting. Unsurprisingly, 79.8% of those who have seen reports of such behaviors makes them less interested in visiting these destinations.

COVID-19 RELATED DESTINATION MEDIA COVERAGE
CAUSING DISCOMFORT VISITING
AS OF NOVEMBER 30



Question: Please think now about COVID-19 related reports you have recently seen in the media. 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?

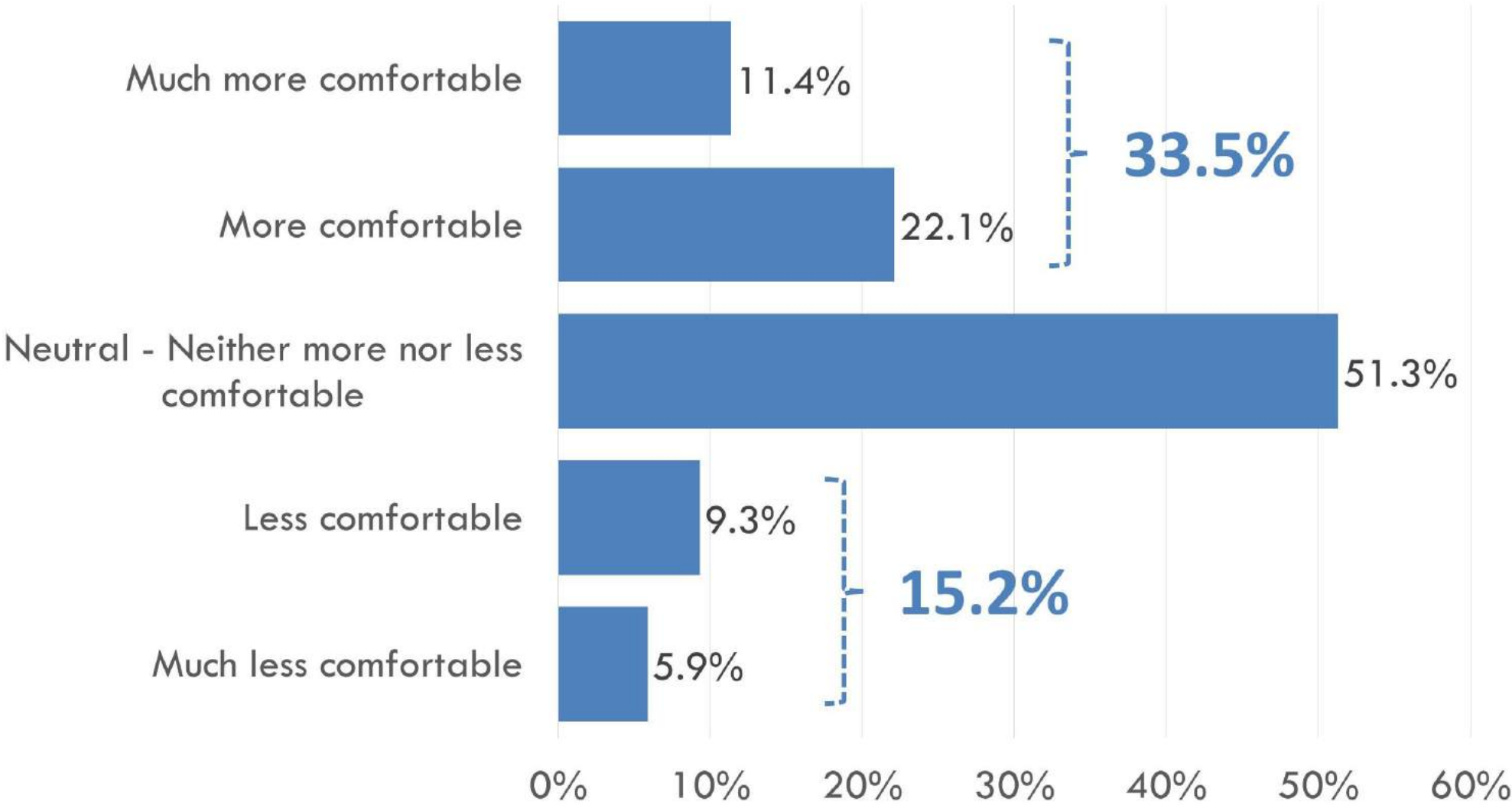
(Base: Wave 38. All respondents, 1,196 completed surveys. Data collected Nov 27-29, 2020)

Impact of COVID-19 Restrictions on Comfort Traveling in Home State

The significant increase in cases has resulted in new or returning consumer restrictions around the United States.

Over half of Americans reports that their local community has instituted more restrictive COVID-19 rules in the past month and over half feel more restrictions are coming. **Just under one-third say new travel restrictions have been imposed where they reside, and just over one-third say they would be more comfortable traveling within their home states under such restrictions.** And while a majority agree with new/reinstituted restrictions and agree it's important people follow government restrictions and recommendations related to controlling COVID-19, these restrictions are achieving their intention to deter travel right now. 29.4% of those with trip plans cancelled or postponed by the pandemic say this was due to government travel restrictions and over 30% said new travel restrictions make them less likely to travel even within their own states in the next two months.

IMPACT OF COVID-19 RESTRICTIONS ON COMFORT TRAVELING IN HOME STATE
AS OF NOVEMBER 30TH



Question: If your home state put in place such restrictions would you be more or less comfortable traveling inside the state? I would feel _____ traveling inside [Home State].

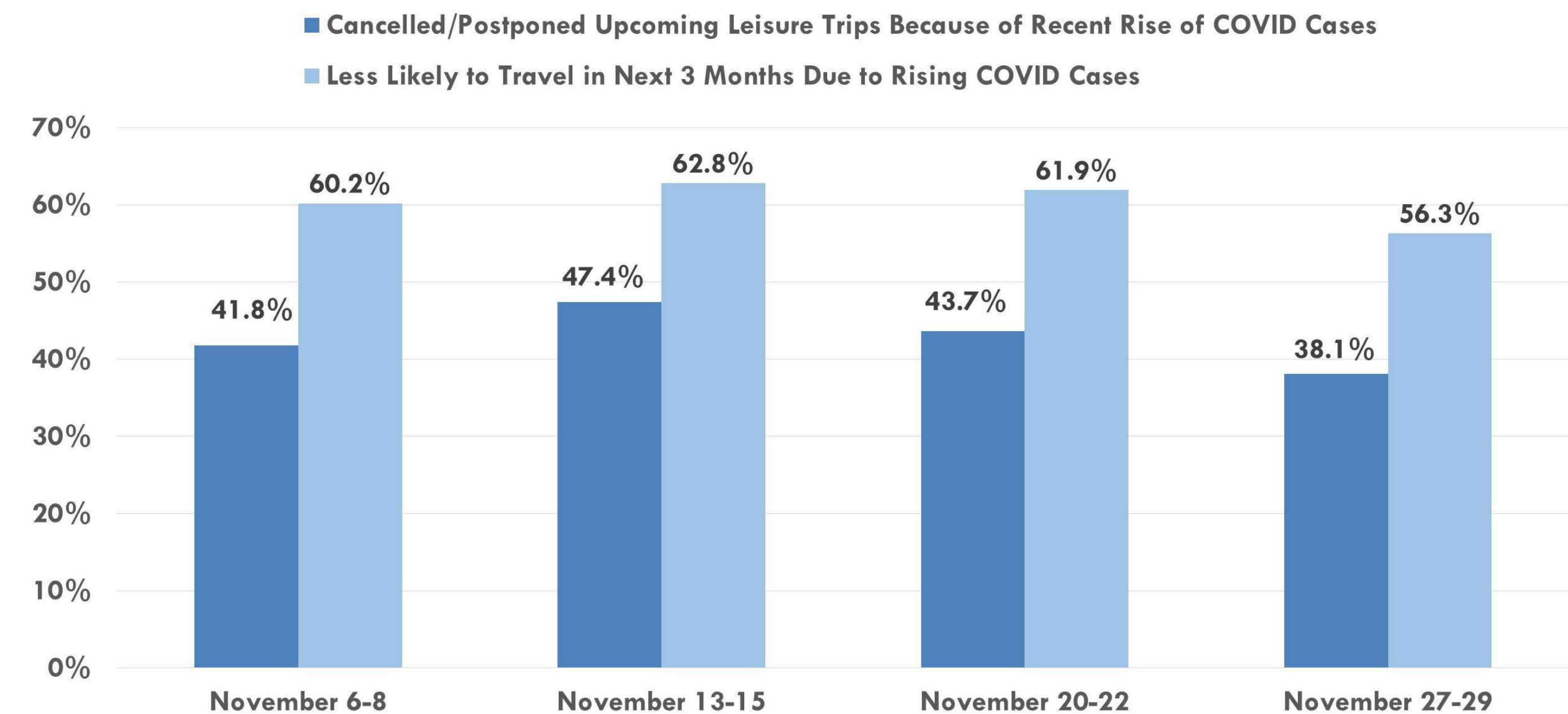
(Base: Wave 38. All respondents, 1,199 completed surveys. Data collected Nov 27-29, 2020)

The Impact of the Recent COVID-19 Surge on Travel Plans

Still, the worst of this latest surge’s impact on travel behavior may be passing or at least be in a temporary reprieve.

The percent of American travelers who report they have cancelled or postponed any upcoming leisure trips because of the recent increases in COVID-19 cases in the U.S. has dropped to 38.1% from 47.4% two weeks ago, and now 56.3% say recent increases in COVID-19 cases around the country have made them less likely to travel in the next three months—down from 62.8% in the same period. This week 55.5% have returned to a readiness (versus hesitation) state-of-mind about travel.

THE IMPACT OF THE RECENT COVID-19 SURGE ON TRAVEL PLANS AS OF NOVEMBER 30TH



Question 1: Have you cancelled or postponed any upcoming leisure trips because of the recent increases in COVID-19 cases seen around the United States?

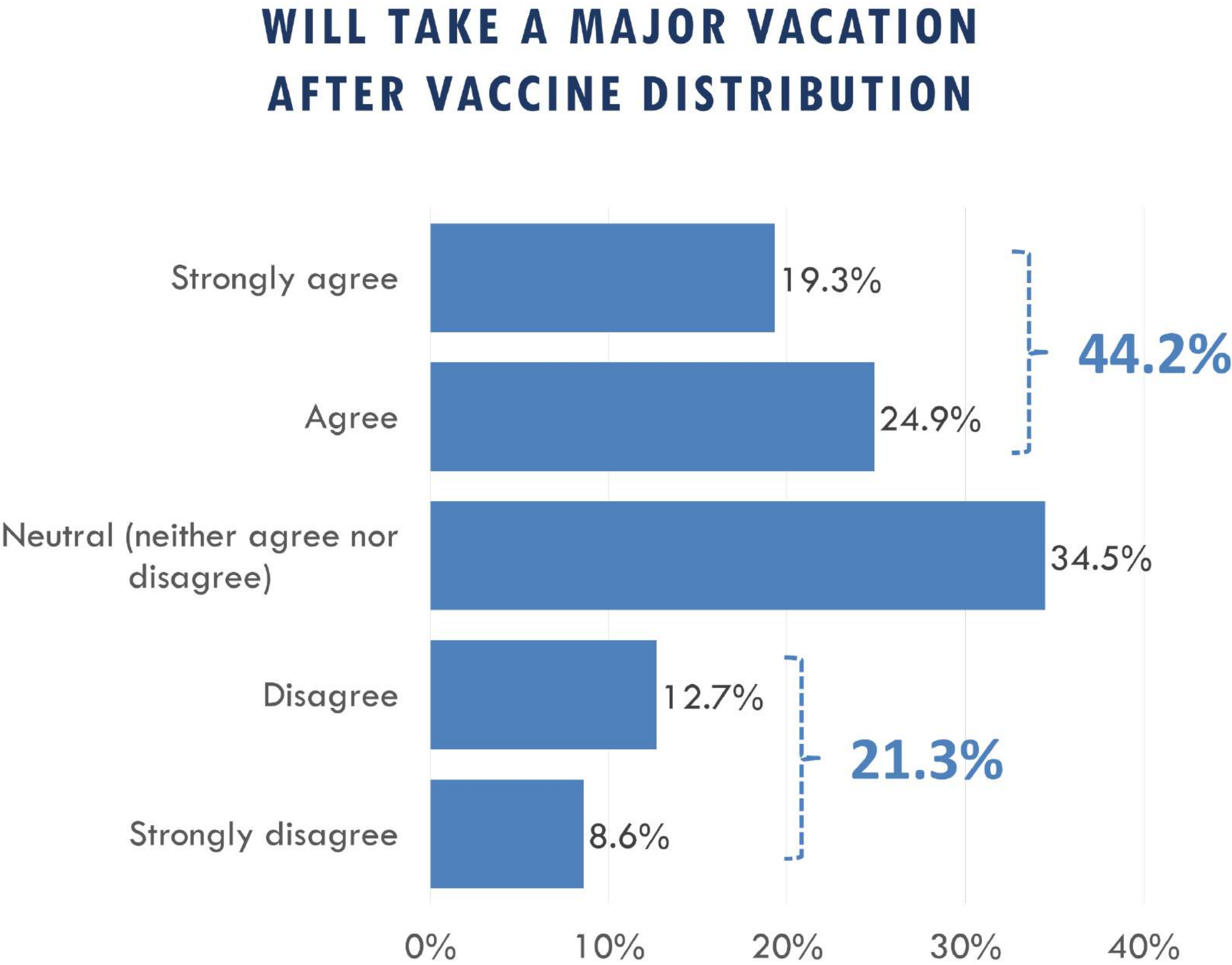
Question 2: Have recent increases in COVID-19 cases around the country made you less likely to travel in the next three (3) months?

(Base: Waves 35-38 data. All respondents, 1,205, 1,206, 1,205 and 1,205 completed surveys.)

Will Take Major Vacation After Vaccine Distribution

Reports of vaccine developments also continue to provide Americans hope about their travel future.

A majority of Americans still feel the latest vaccine news makes them more optimistic they can travel safely in the next six months. **Over 44.2% agree that their “first trip after a COVID-19 vaccine becomes available will be a vacation, likely to a place far from my home.”**



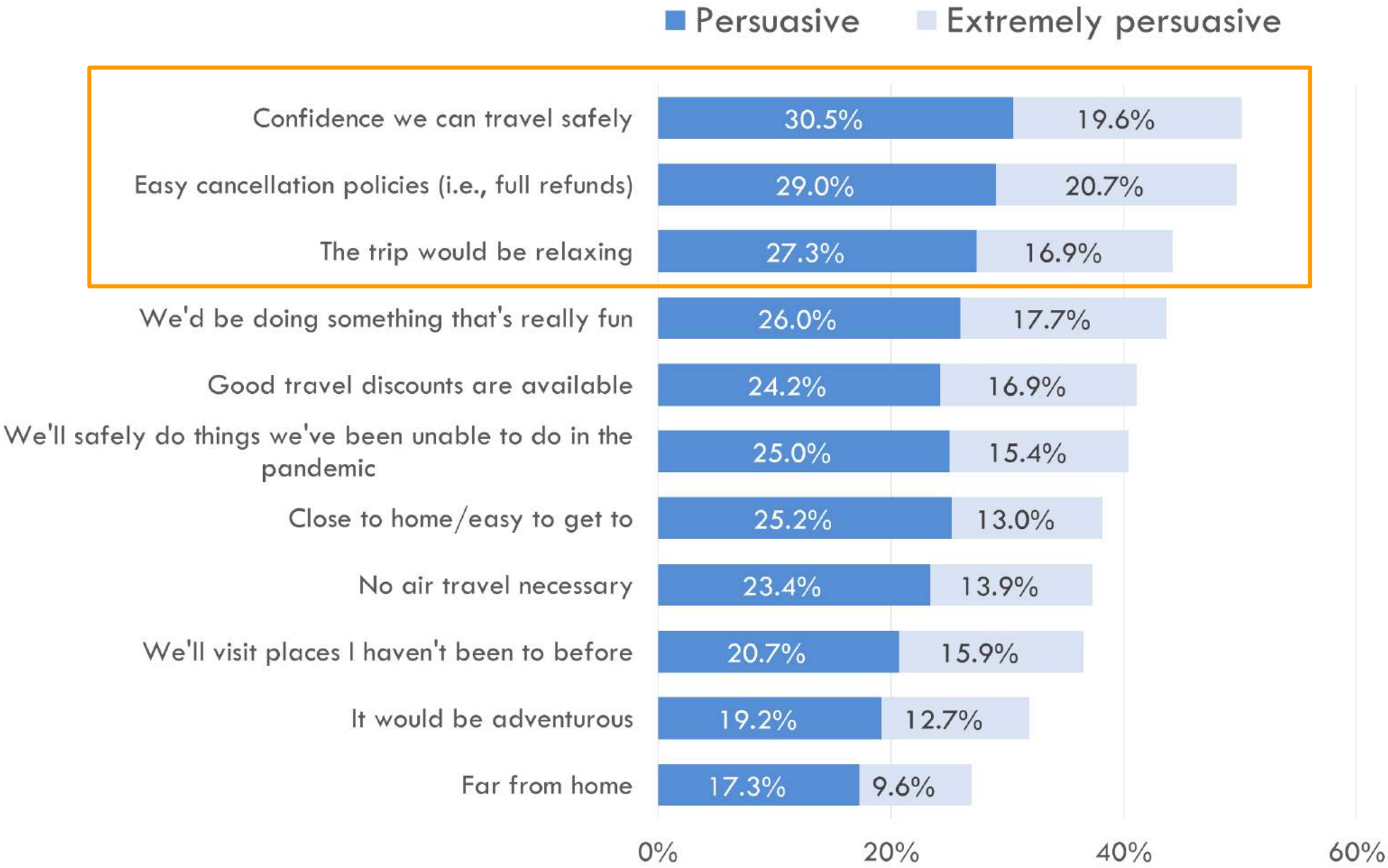
Question: How much do you agree or disagree with the following statement? My first trip after a COVID-19 vaccine becomes available will be a vacation, likely to a place far from my home.

(Base: Wave 38. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

Persuasive Attributes to Motivate Travel & Most Desired Travel Destinations

This week 80% of American travelers have at least tentative trip plans for the future. In trying to understand what will motivate Americans to take trips, we requested those we surveyed to imagine that a friend or family member came to them with an idea to travel together in the next six months, and then asked what possible attributes of their friend's travel idea would be most persuasive to get them to go. **The pandemic clearly still weighs heavy, with confidence travel can be done safely, easy cancellation policies and relaxation the top motivational attributes. However, when asked where they most want to travel to in the next 12 months, the Hot List looks nearly identical to pre-pandemic, with Florida, Las Vegas, California, New York and Hawaii coming out on top.**

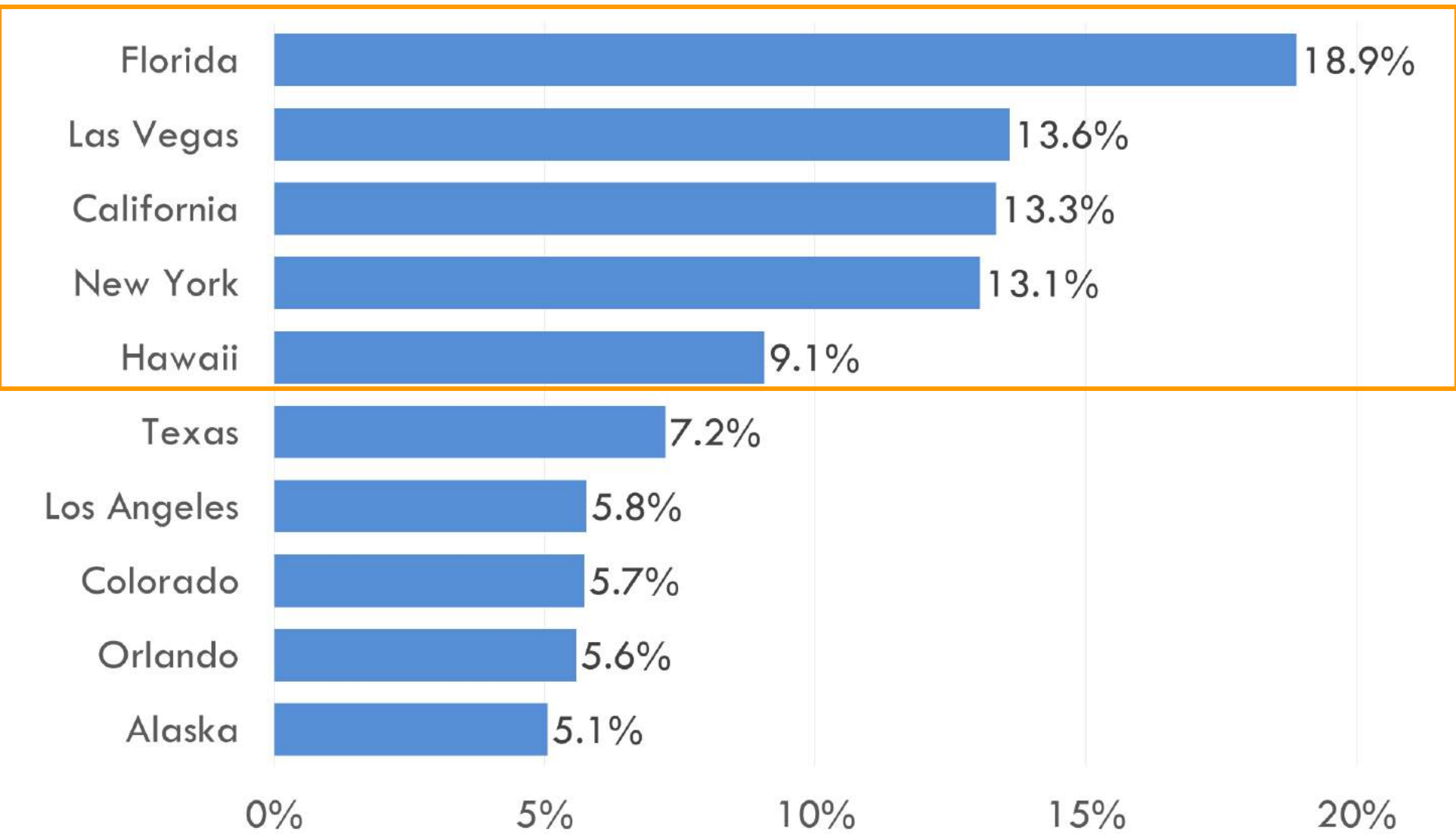
**PERSUASIVE ATTRIBUTES
TO MOTIVATE TRAVEL
AS OF NOVEMBER 30TH**



Question: Imagine that a friend or family member comes to you with an idea to travel together in the next six (6) months. What possible attributes of your friend's travel idea would be more persuasive to get you to go?

(Base: Wave 38. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

**MOST DESIRED TRAVEL DESTINATIONS
IN THE NEXT 12 MONTHS
AS OF NOVEMBER 30TH**



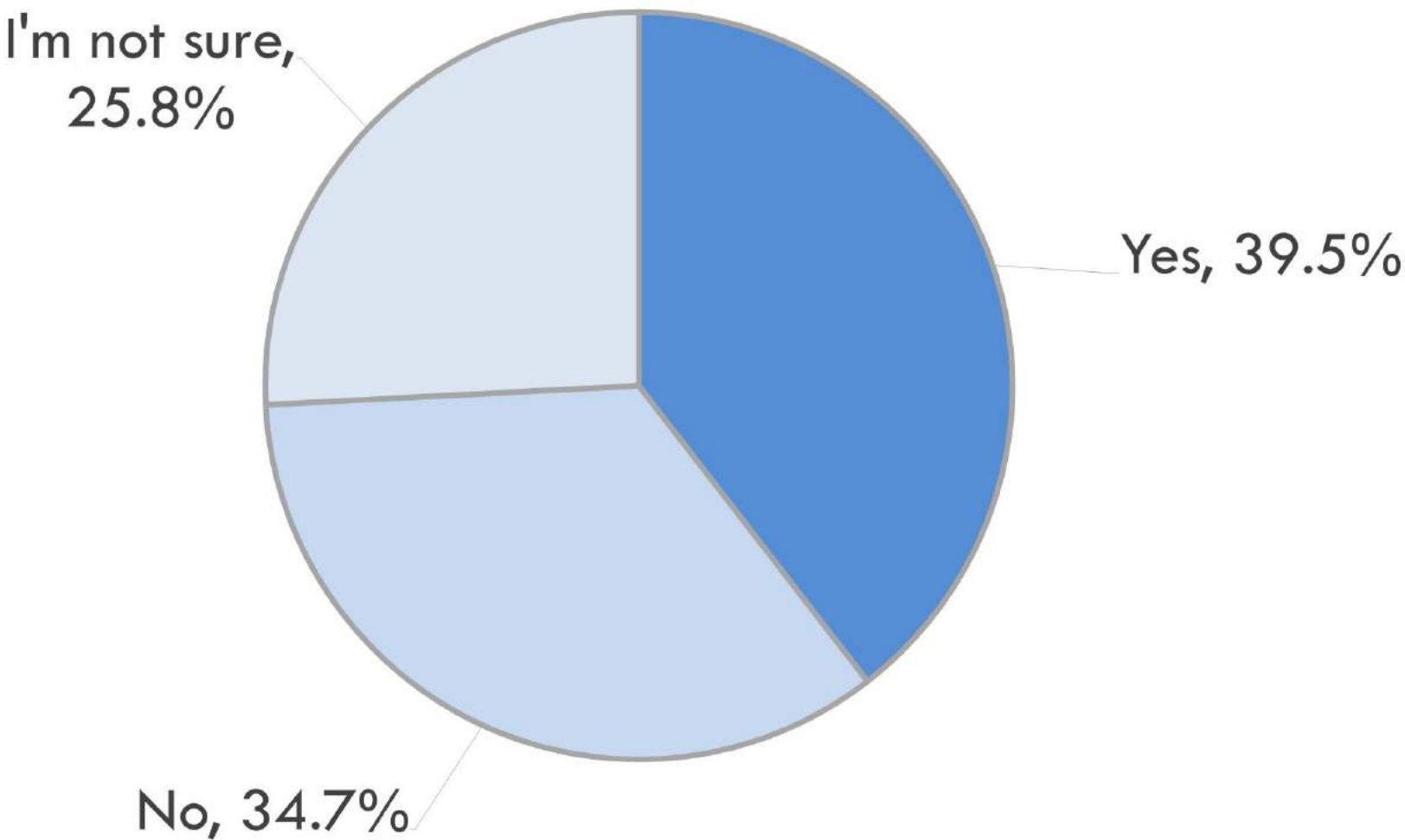
Question: What are the three (3) United States travel destinations that you most want to visit in the next twelve (12) months? (open-ended question)

(Base: Wave 38. All respondents, 1,205 completed surveys. Data collected Nov 27-29, 2020)

COVID-19 testing will likely remain part of American travel behaviors for the near future.

28.7% of those who have traveled by air during the pandemic said they tested themselves after their most recent commercial airline trip. **Nearly 40% of Americans planning a leisure trip in the near term say they plan on taking a COVID-19 test prior to taking their next trip.**

COVID-19 TESTING PRIOR TO NEXT TRIP
AS OF NOVEMBER 30TH



Question: Do you plan on taking a COVID-19 test prior to taking your next trip?

(Base: Wave 38. Respondents planning to take a leisure trip in the near future (before September 2021), 655 completed surveys. Data collected Nov 27-29, 2020)



Coronavirus Travel Sentiment Index

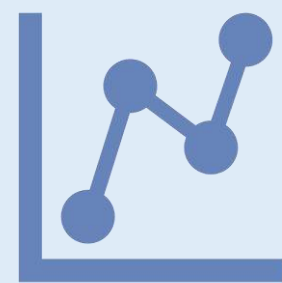
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 30th

What is a Predictive Index?



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



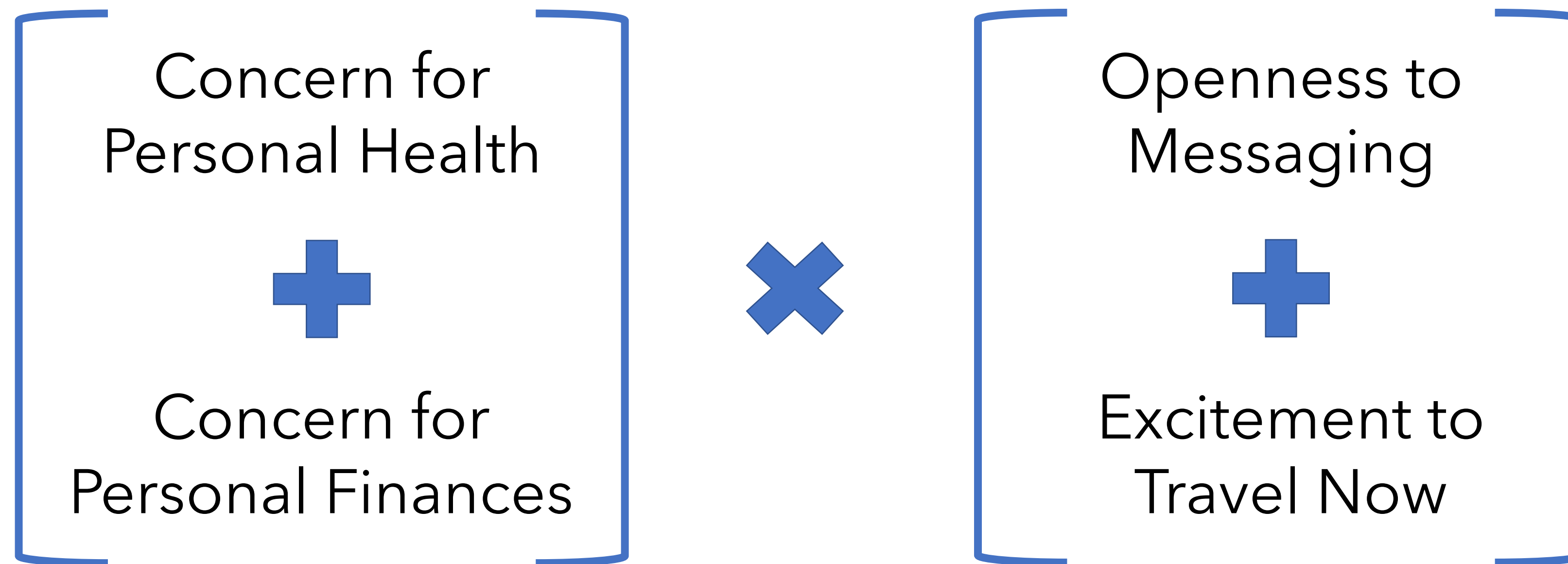
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

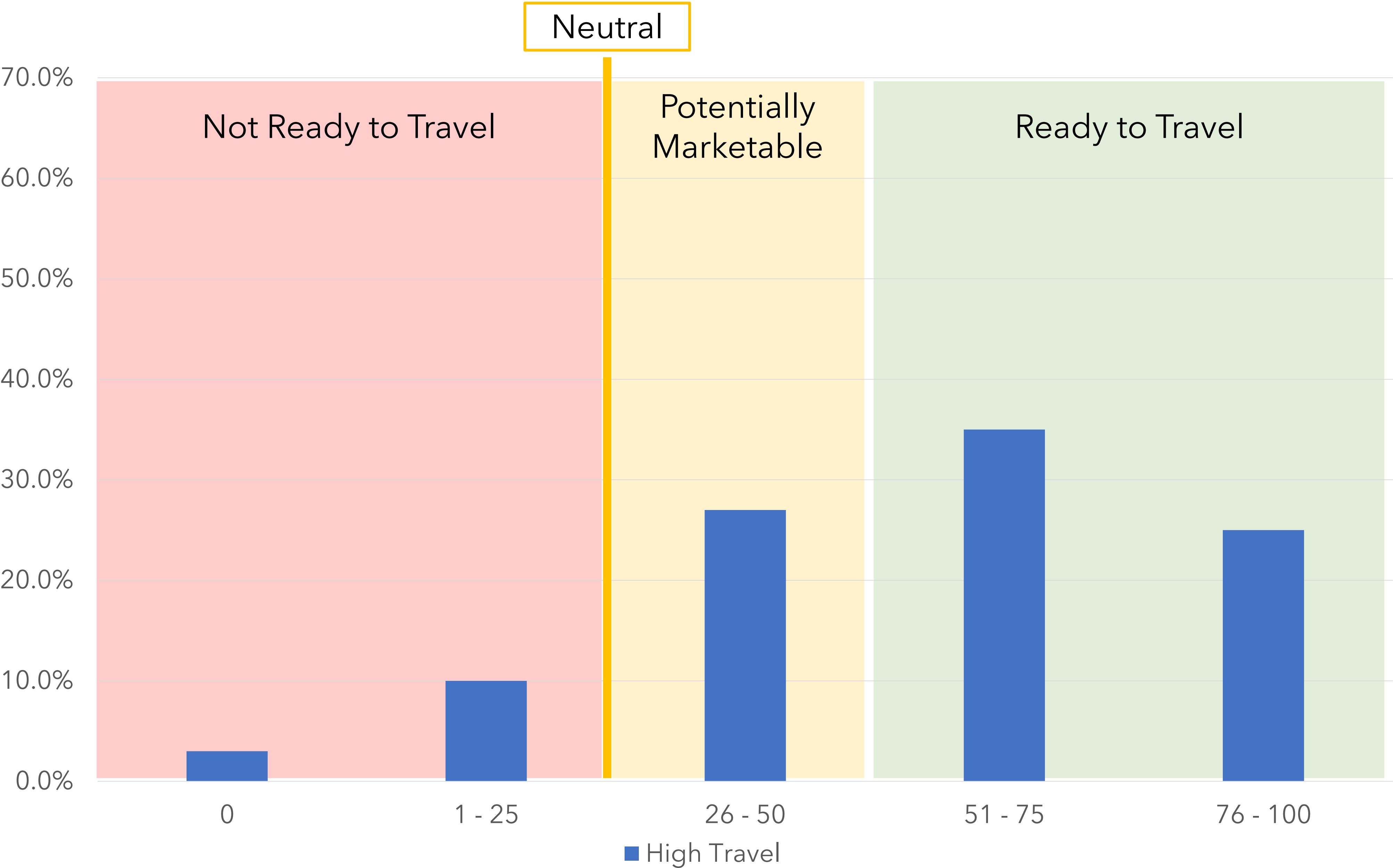
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula

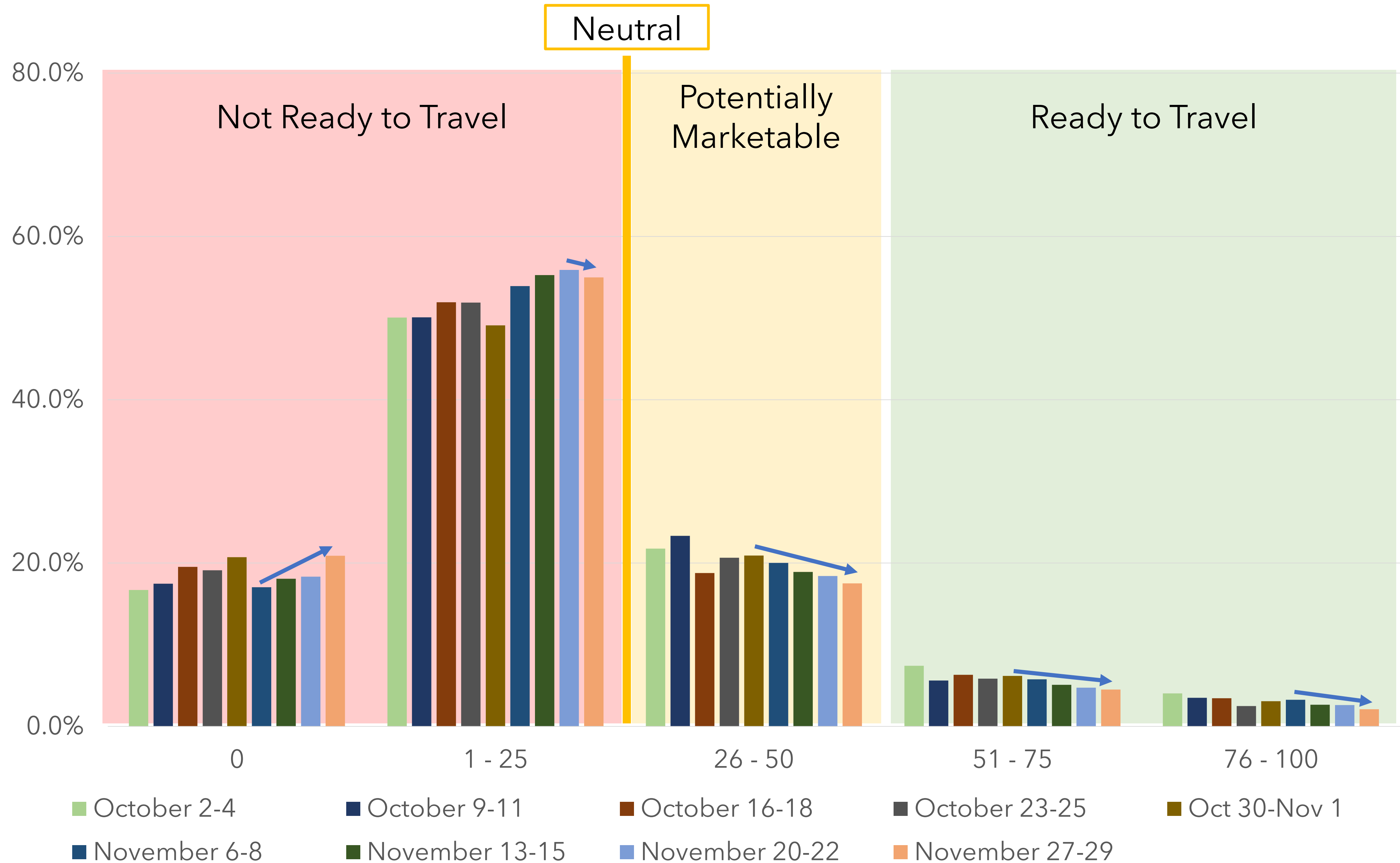


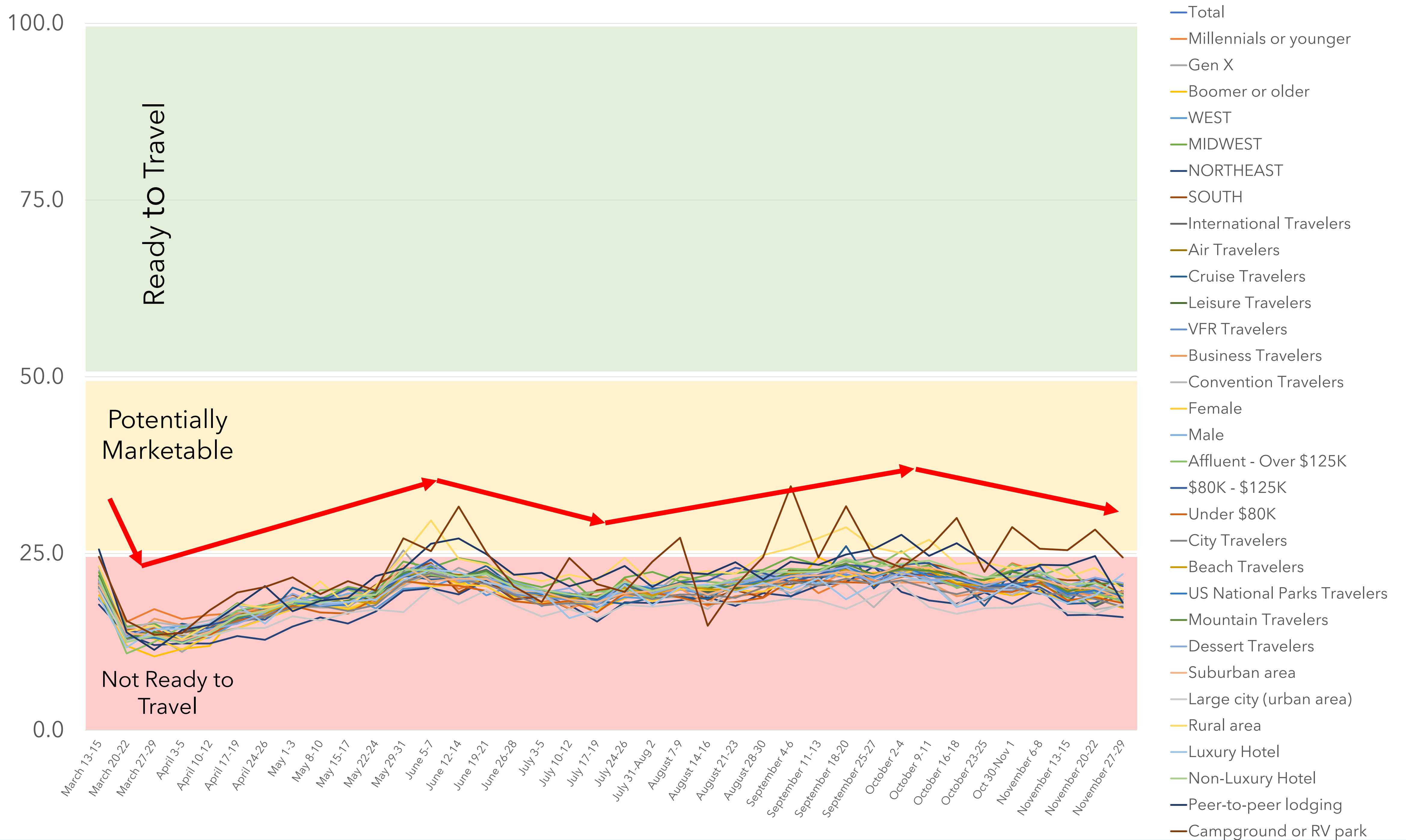
*Normalized to a 100pt scale

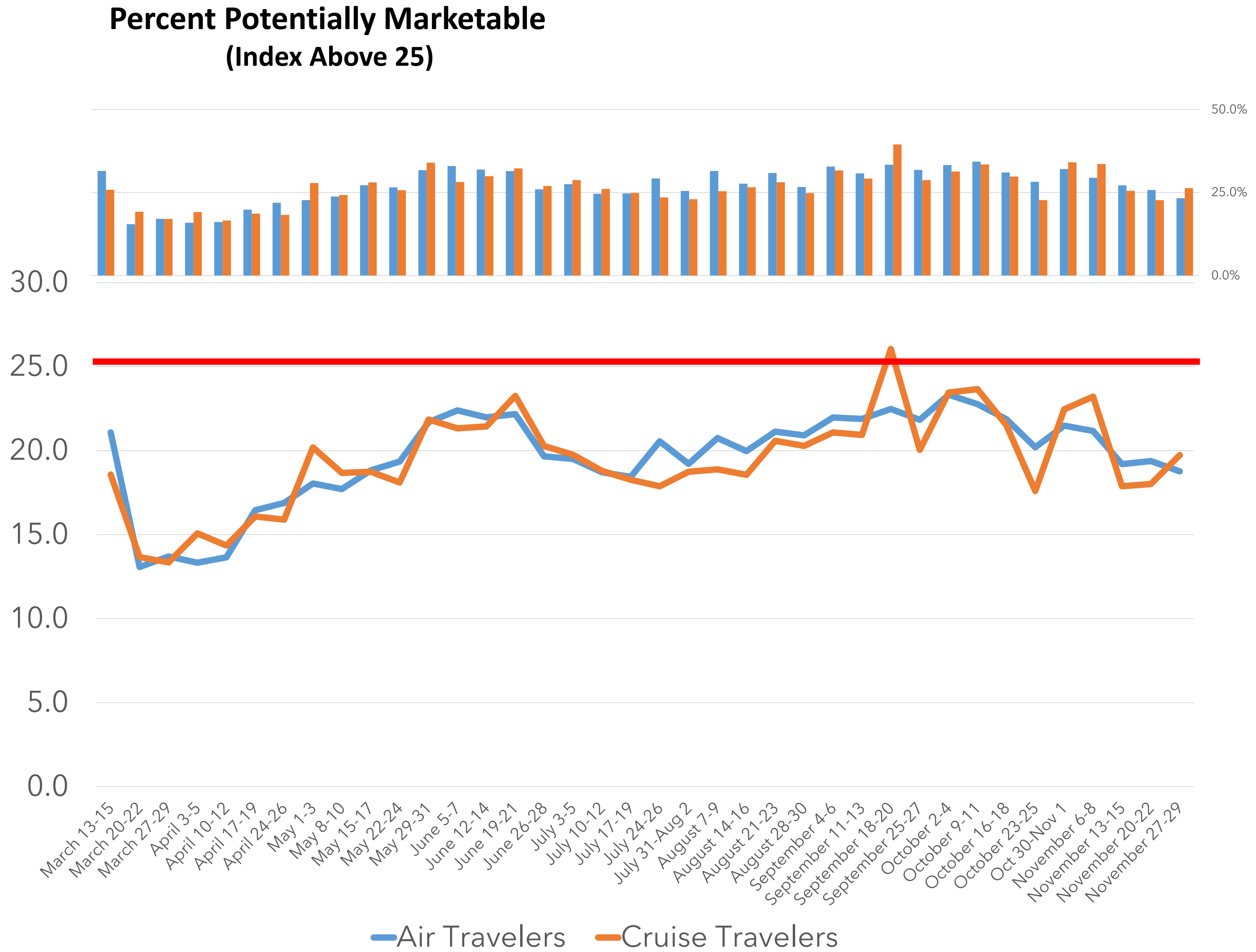
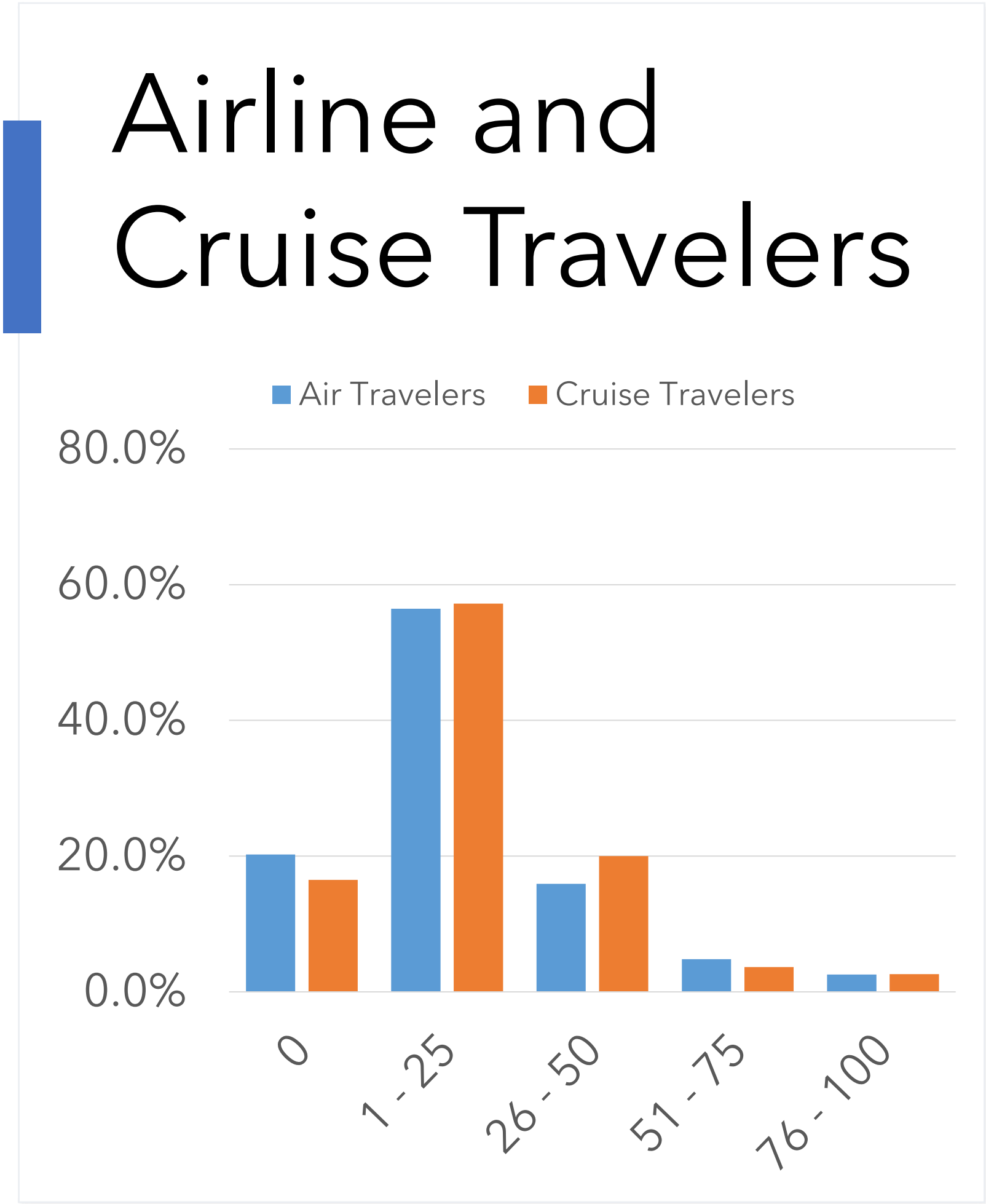
Healthy Travel Outlook

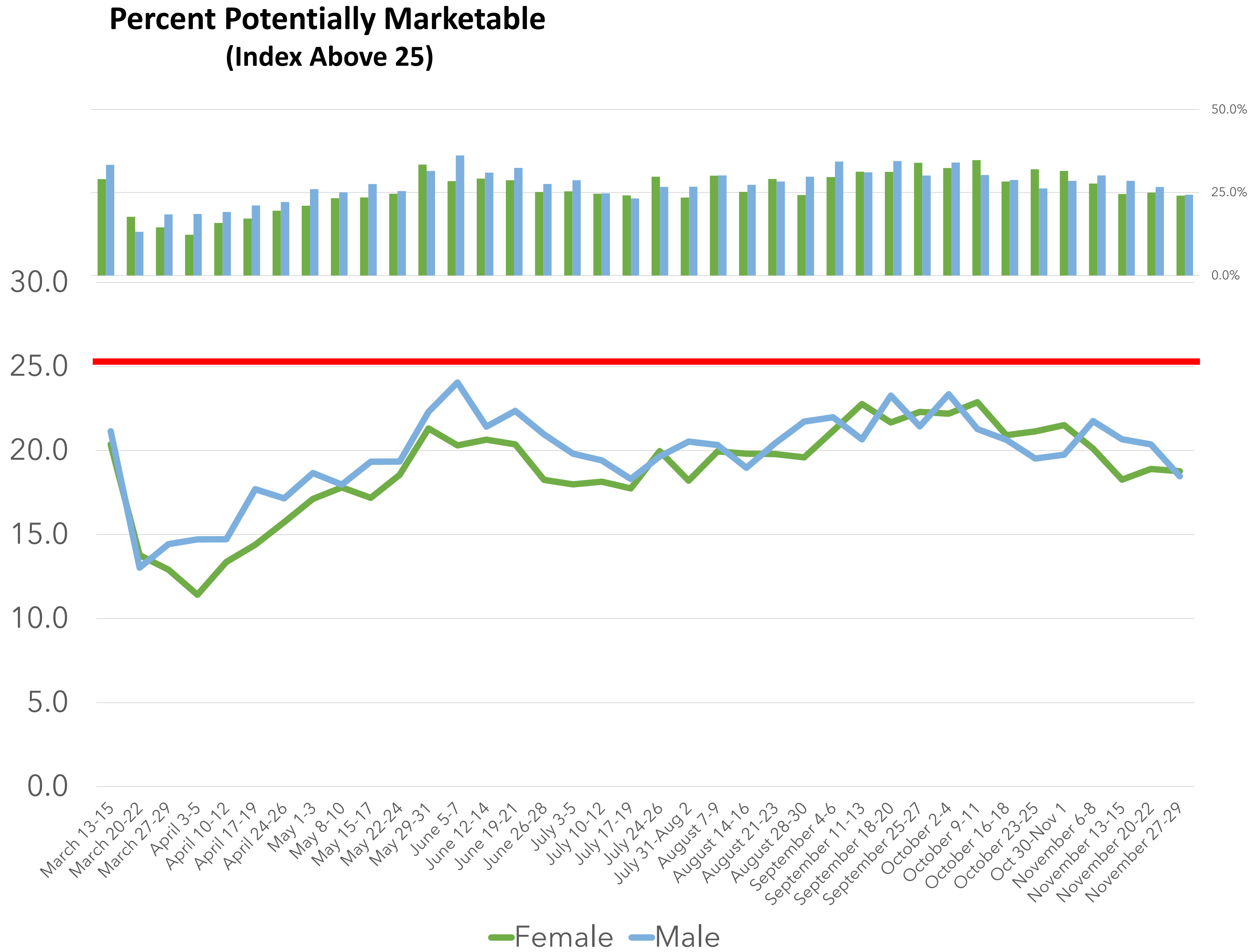
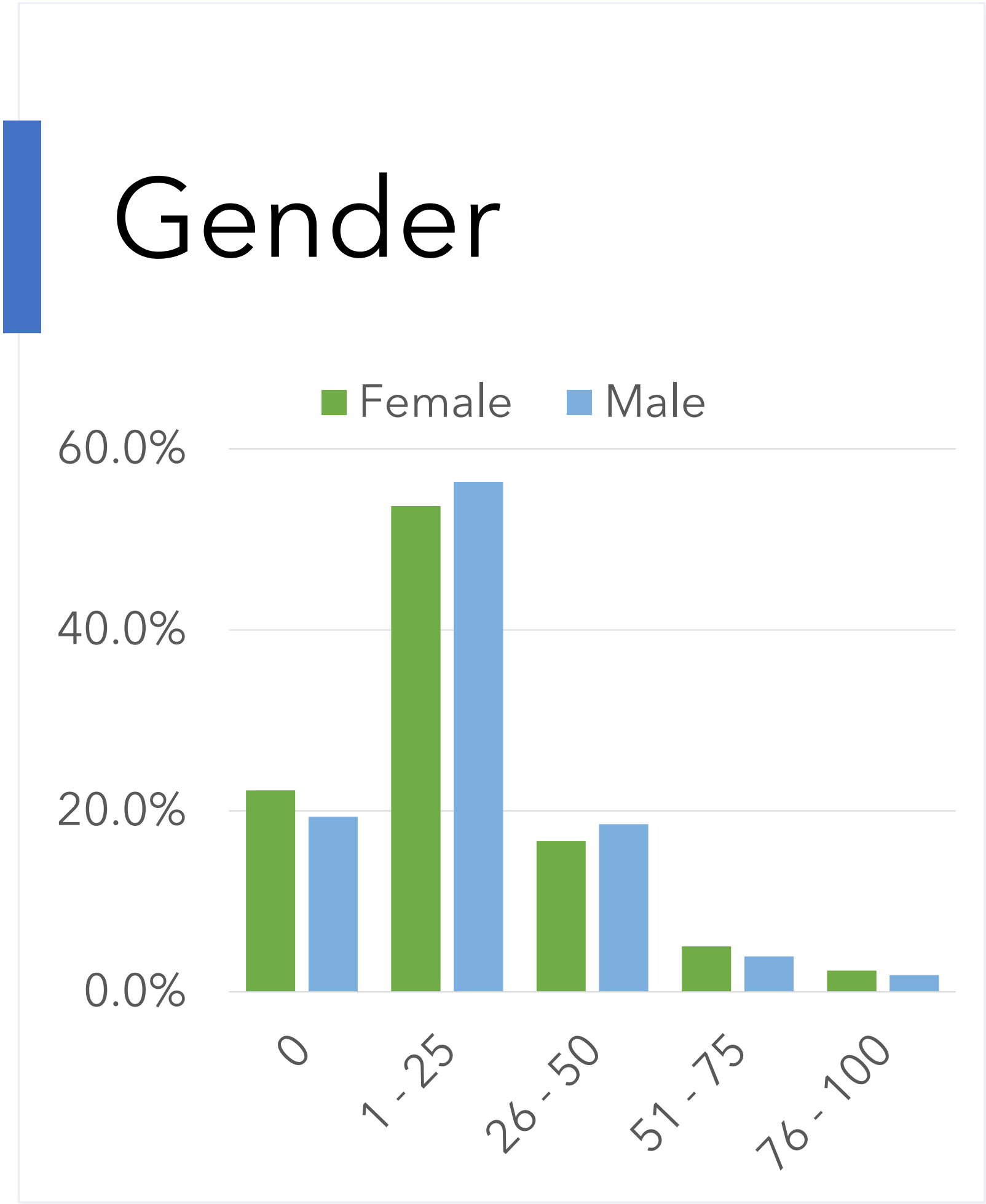


Travel Outlook



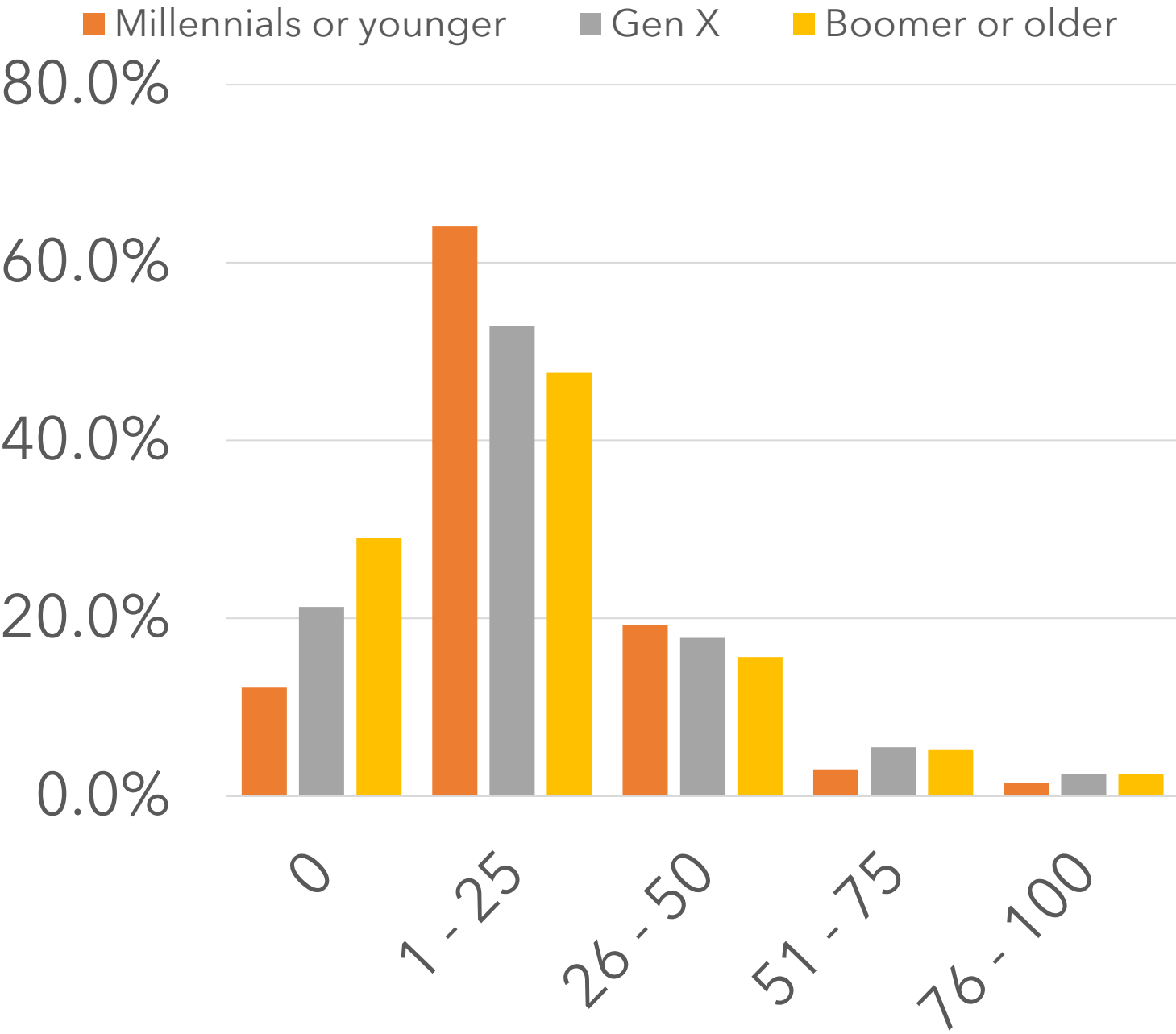




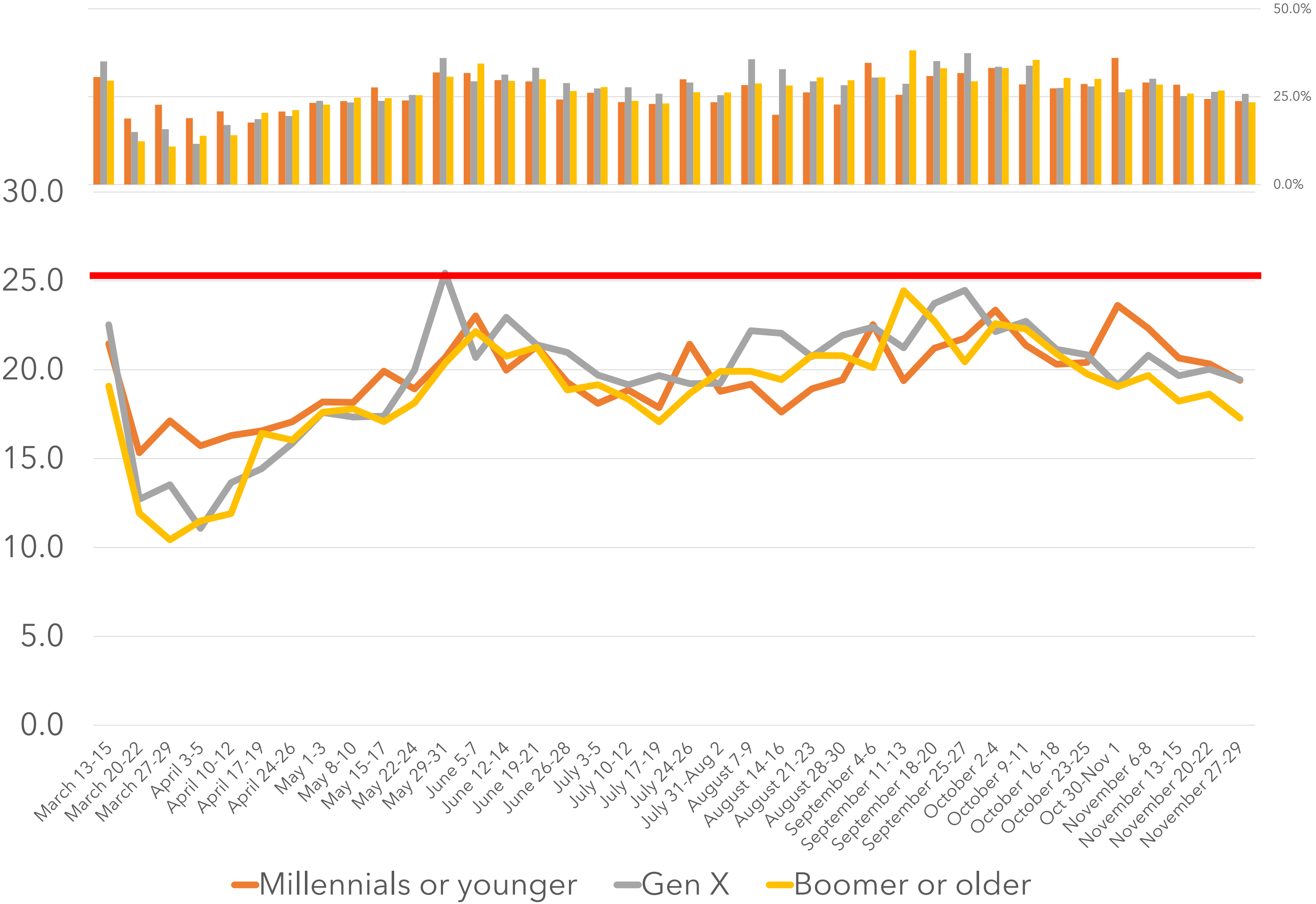


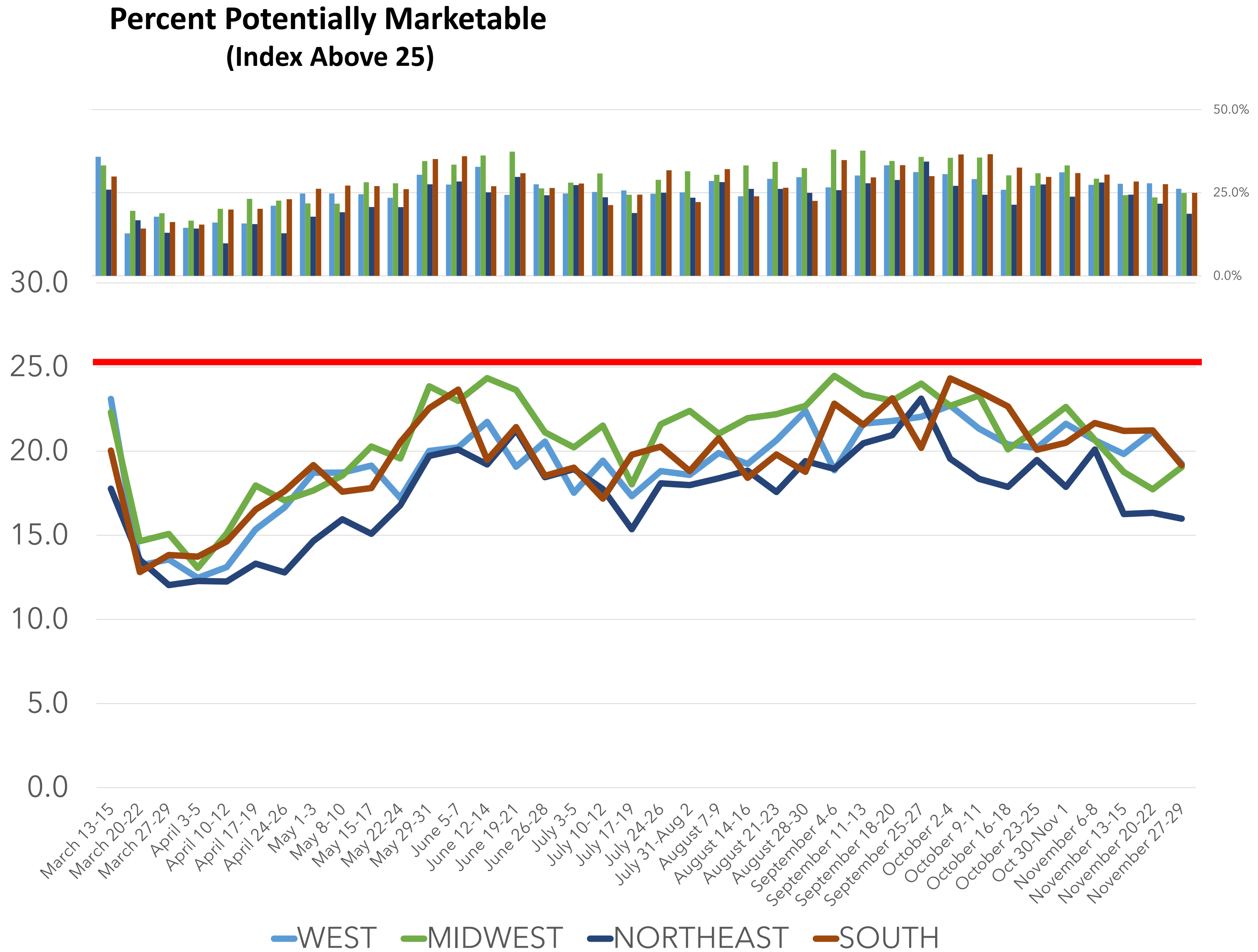
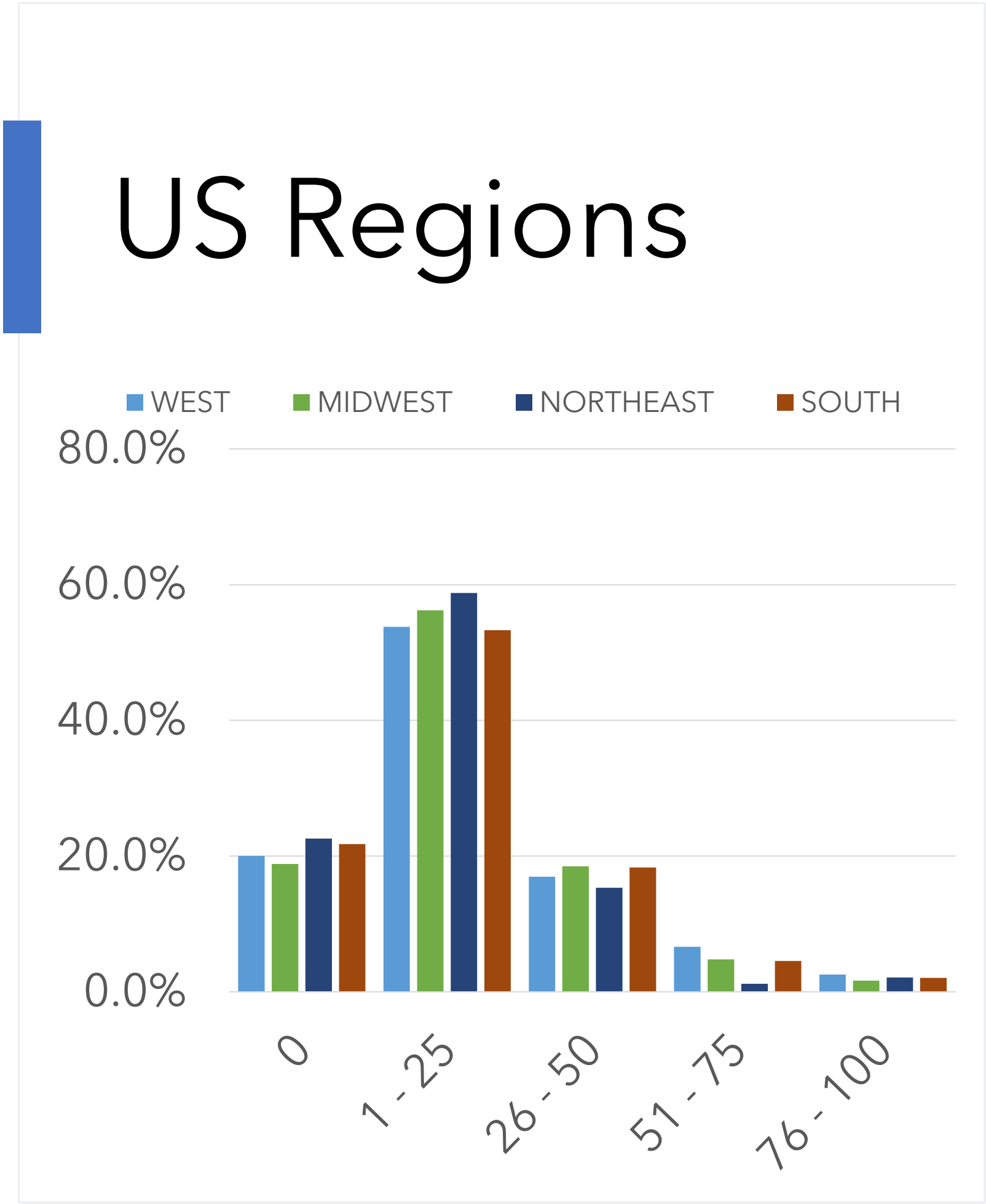


Generation



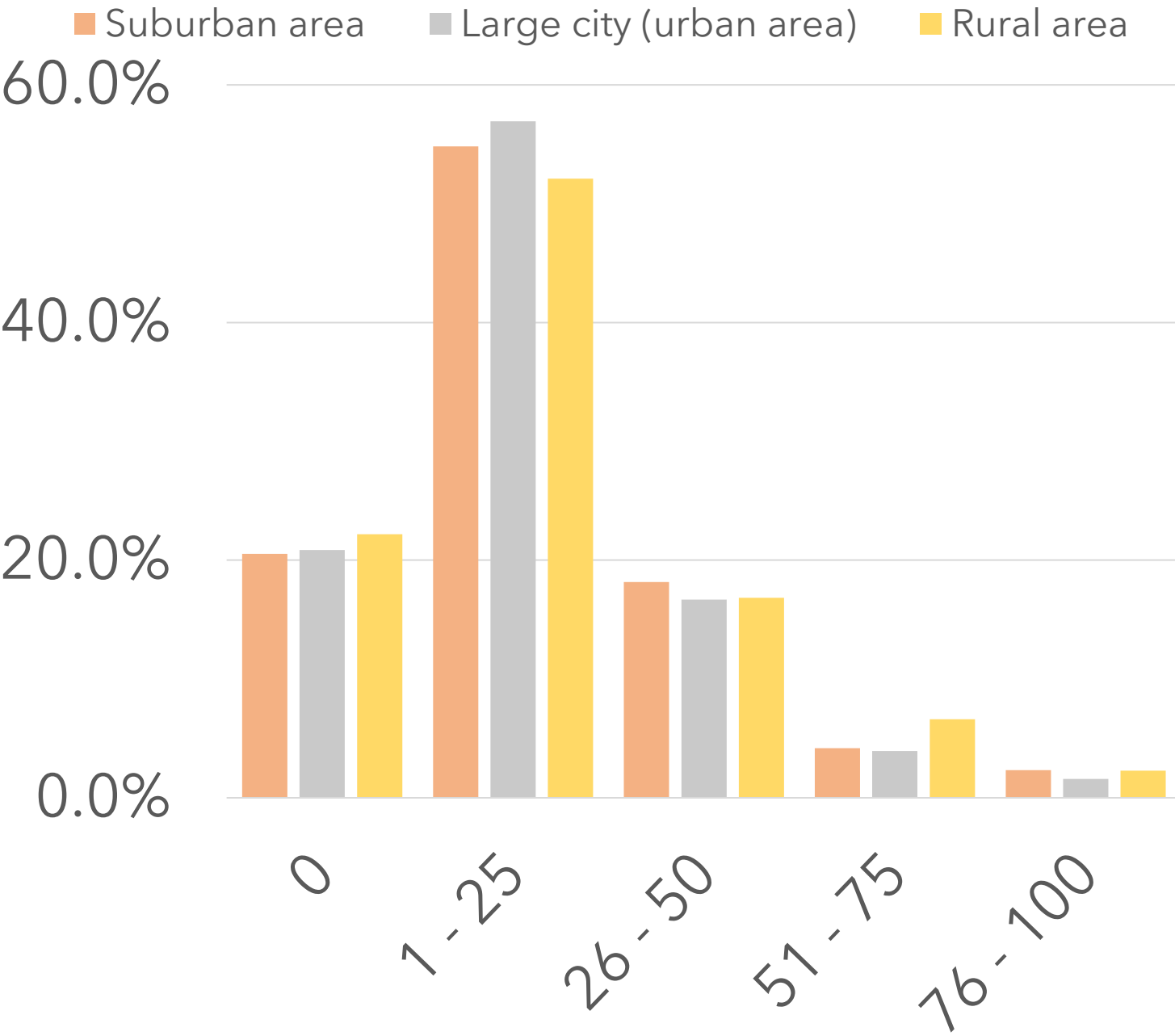
Percent Potentially Marketable (Index Above 25)



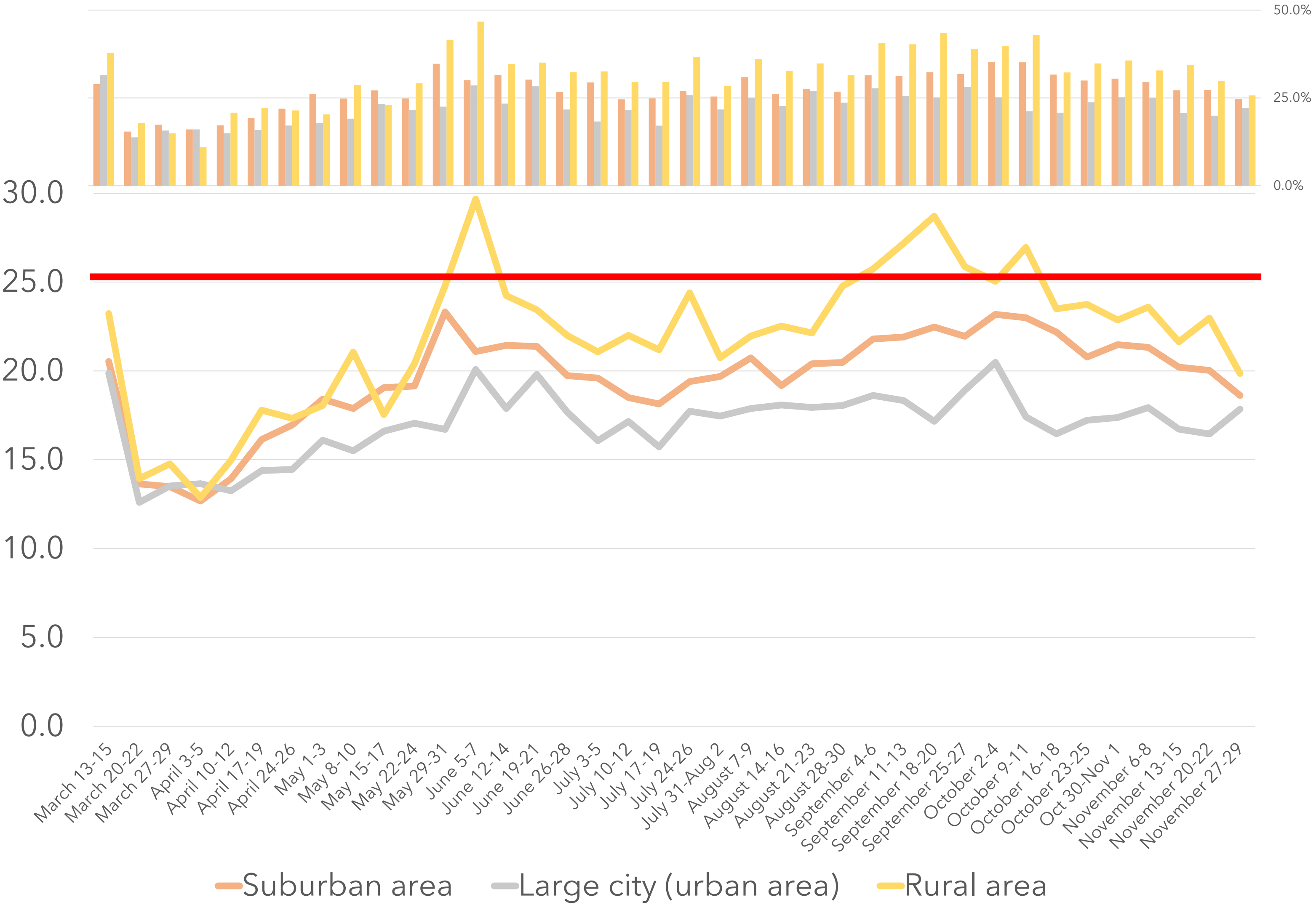


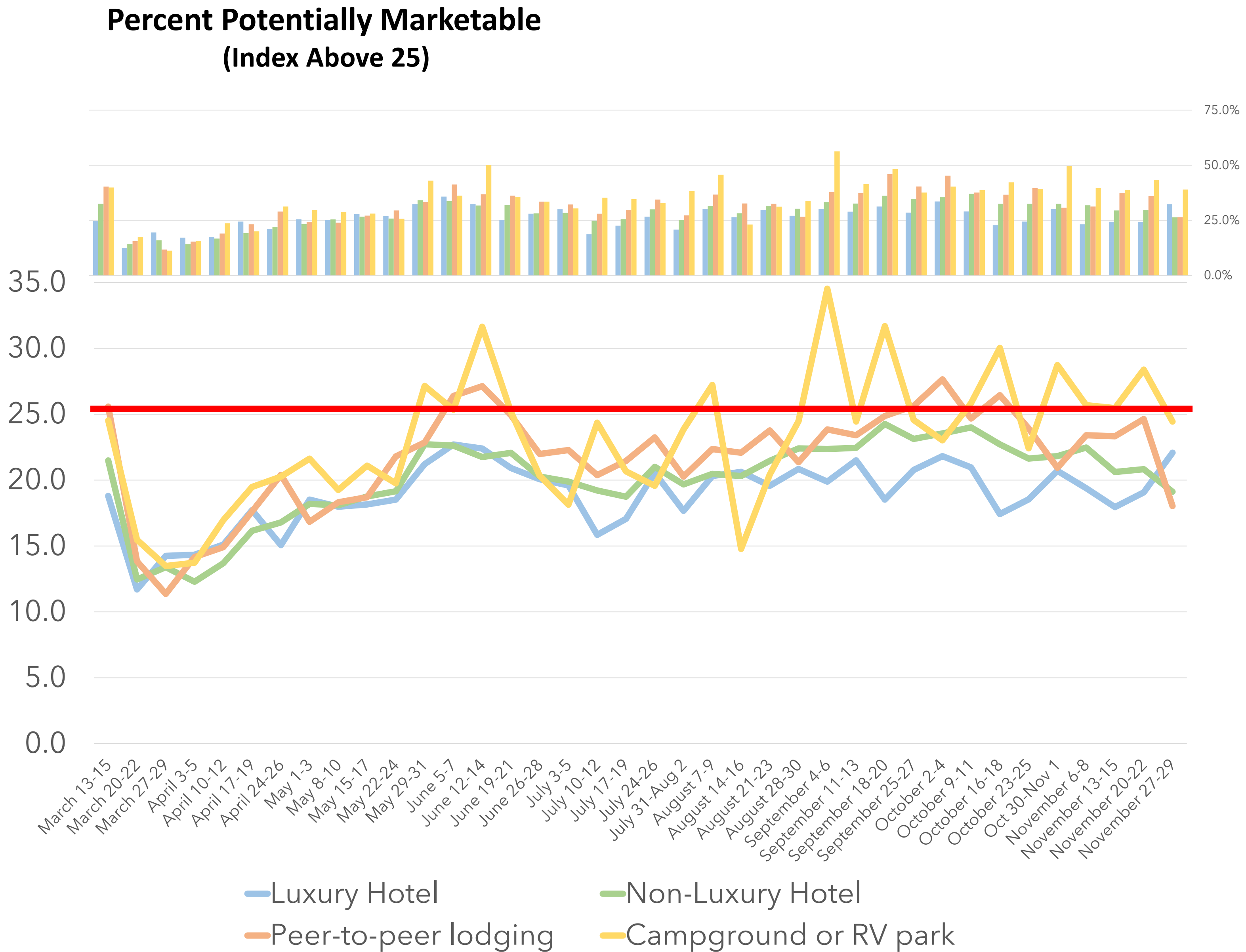
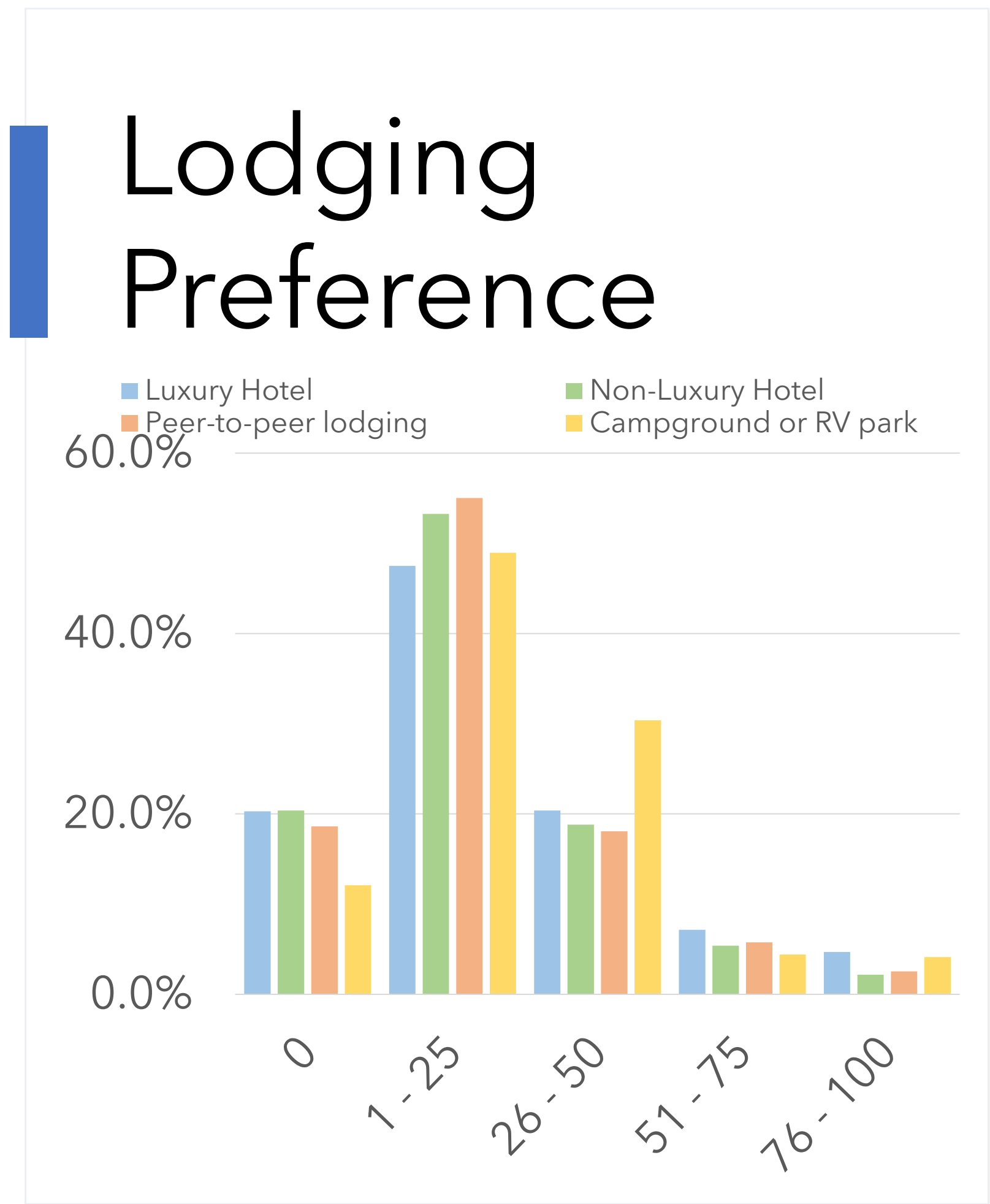


Residence Type



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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Visitor Activity Analysis & Segmentation

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