CORONAWIRUS TRAWEL SENTIMENT KEY FINDINGS—WEEK OF FEBRUARY 15th, 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.

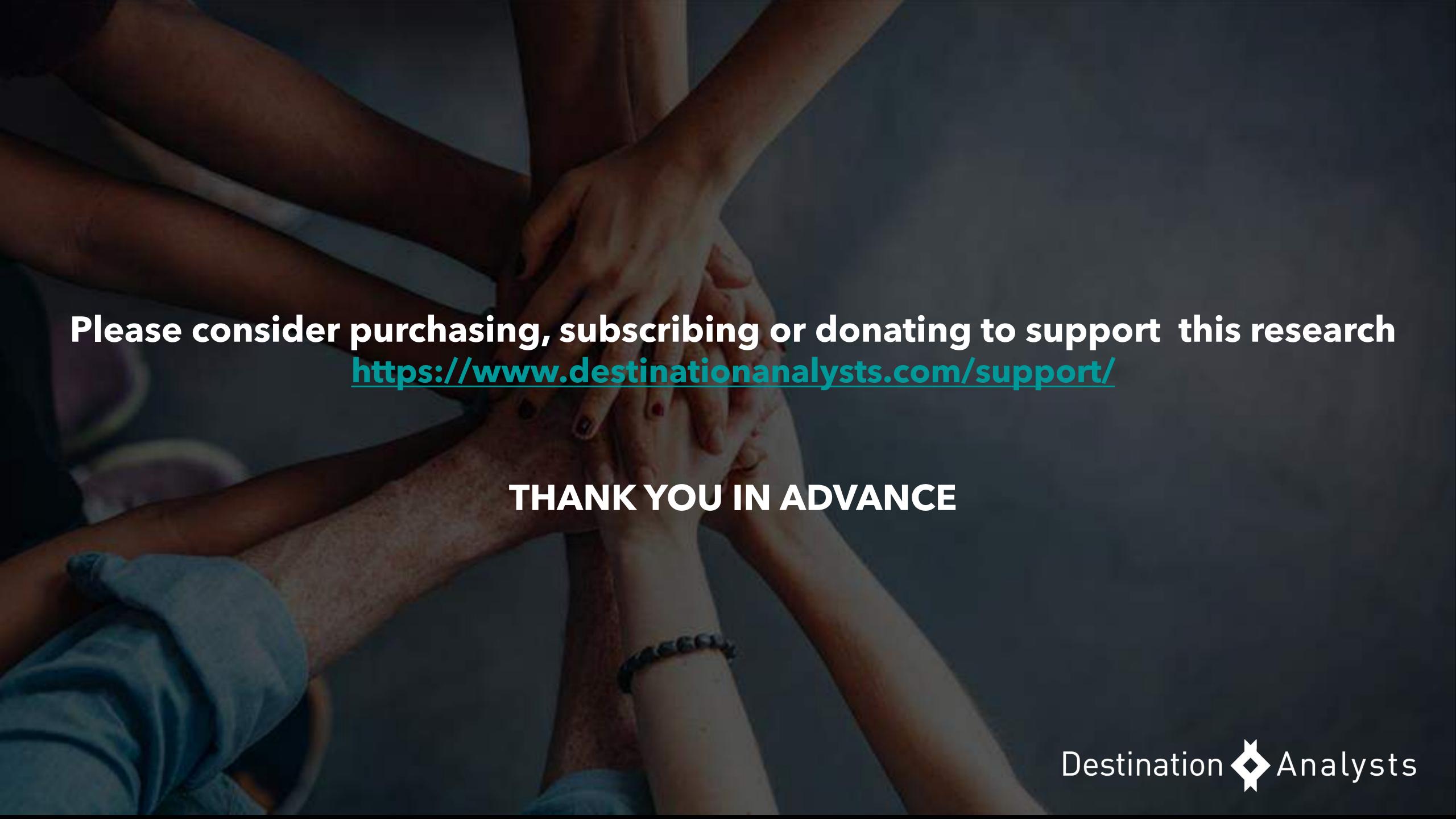
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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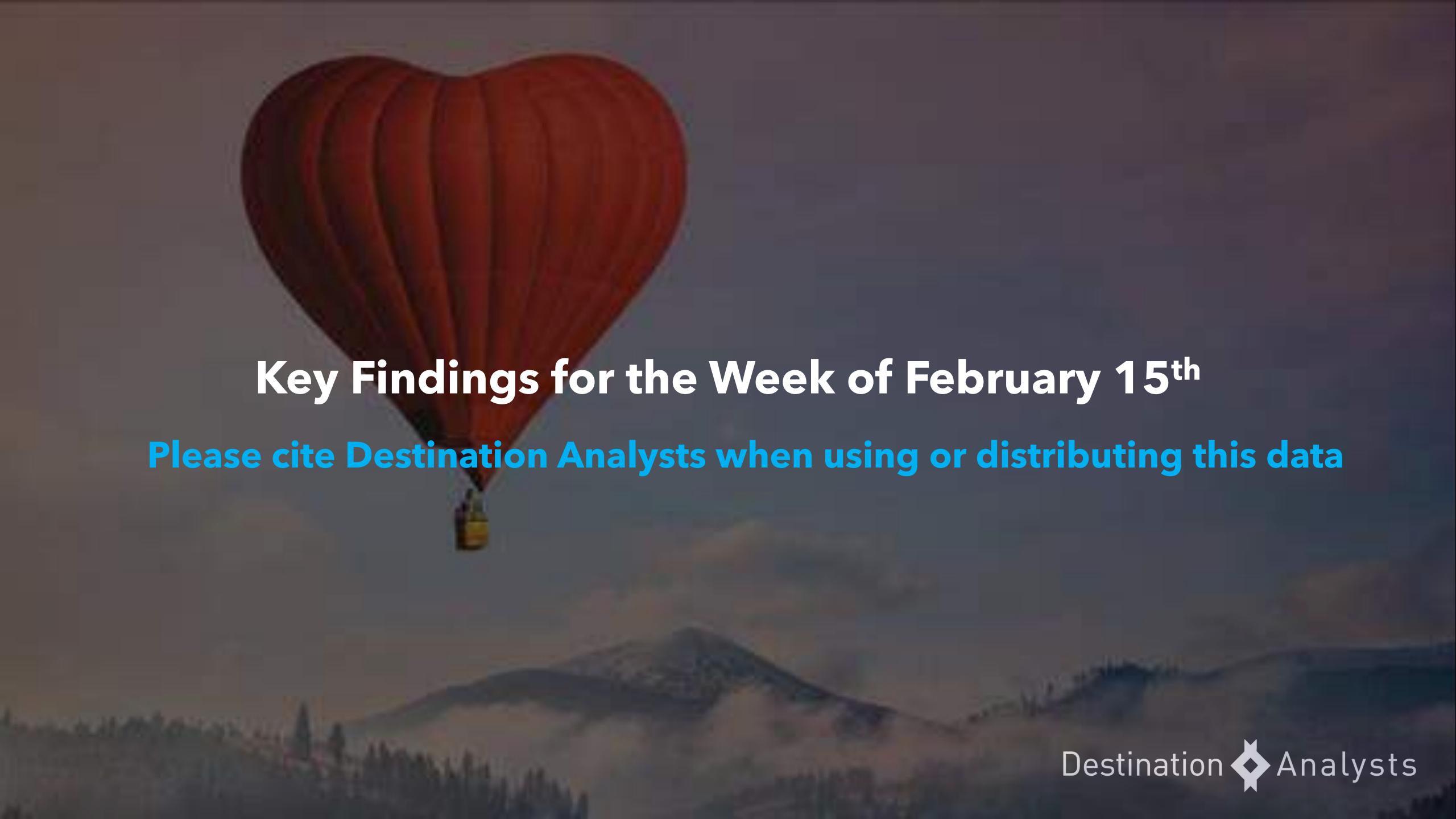


Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week's travel insights update will be followed by a diverse panel of real travelers who will share how travel marketing impacts their decisions and how official destination assets can best inspire.

Sign up to attend the webinar on Tuesday, February 16th at 11:00am ET here.





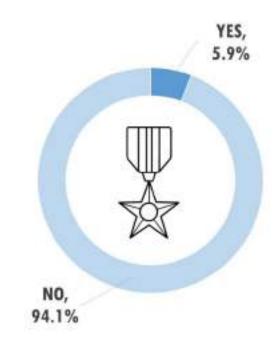
Holiday Travel During the COVID-19 Pandemic

As Americans celebrated both Valentine's Day and President's Day, a total of 12.7% said they took a trip for the long weekend—double what was reported for Memorial Day weekend in the early pandemic period, and a similar rate to Labor Day weekend, which followed the summer coronavirus case surge.

HOLIDAY TRAVEL DURING THE COVID-19 PANDEMIC:

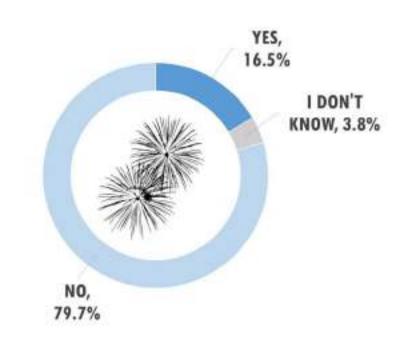
AS OF FEBRUARY 14, 2021

MEMORIAL DAY WEEKEND



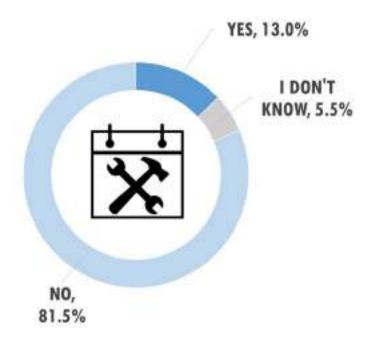
(Base: Wave 11. All respondents, 1,223 completed surveys. Data collected May 22-24, 2020)

FOURTH OF JULY WEEKEND



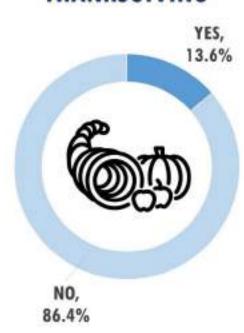
(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

LABOR DAY WEEKEND



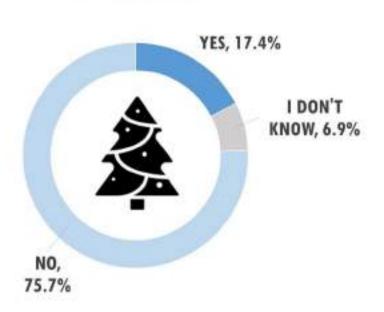
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)

THANKSGIVING



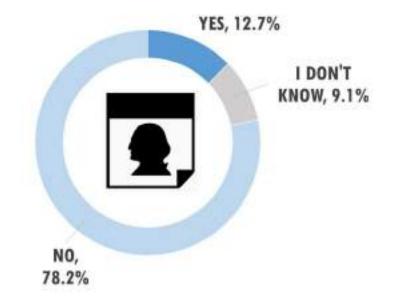
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

CHRISTMAS



(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected December 18-20, 2020)

PRESIDENT'S DAY



(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

Question: Will you be traveling over the _____ holiday?



Feelings About the Coronavirus Situation

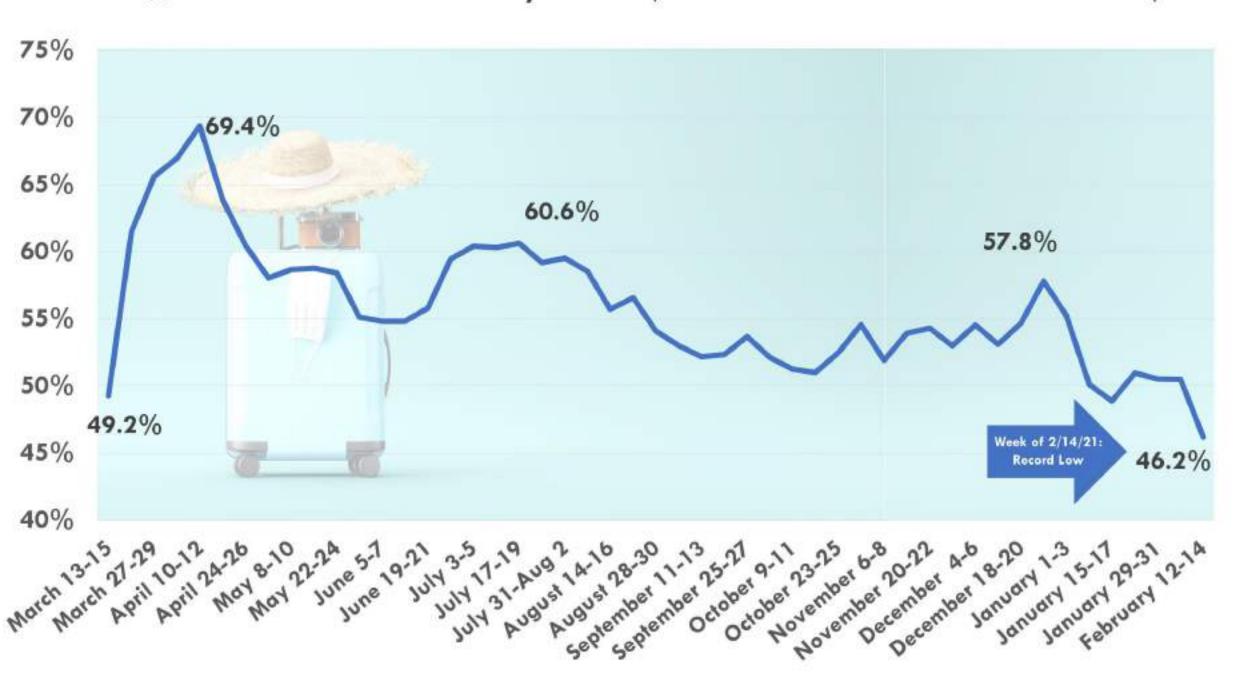
As daily new cases have dropped dramatically over the last month and vaccines continue to be administered, Americans' anxiety about the pandemic—from both the financial and health impact perspectives—continues to decline. Now a record 39.3% of Americans feel the situation will get better in the next month—and only 22.7% feel it will get worse. The highest optimism about the pandemic's course had ever previously been prior to this period was the week of May 4th, 2020, when 35.1% believed things would get better in the next month. And even then, pessimism still outweighed optimism, unlike today.

These better feelings translate to travel. **Perceptions of travel and leisure** activities as unsafe has fallen to an average of 46.2%—a record low since the start of the pandemic. About 60% of American travelers feel at least somewhat confident they can travel safely in the current environment, and those who would have travel guilt has declined to 44.0% from a recent peak of 54.6% the week of December 14th. Now 58.5% are in a travel readiness state of mind.

PERCEPTIONS OF TRAVEL & LEISURE ACTIVITIES AS UNSAFE

MARCH 13, 2020 - FEBRUARY 14, 2021

% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITIES TESTED)



Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Waves 1-49. 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, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

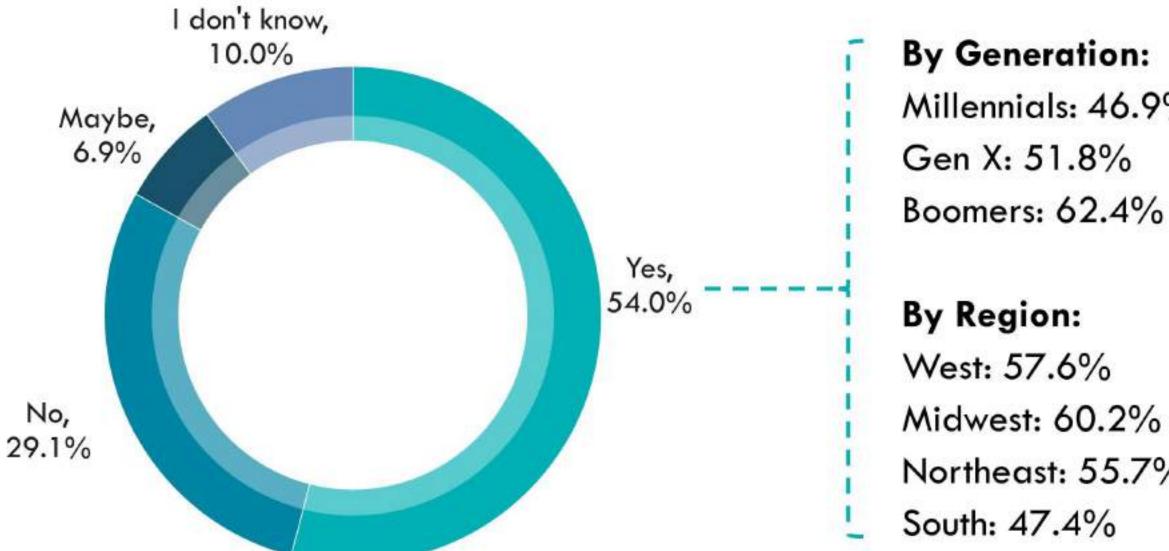


Impacts of the COVID-19 Vaccine

Vaccines continue to keep optimism up among a majority of American travelers. Nearly 6-in-10 travelers say COVID-19 vaccines make them more optimistic about life returning to normal in the next six months and 52.9% say it makes them more optimistic about the ability to travel safely in that same time.

This week, 54.0% of American travelers report that they have a friend or relative who has received the vaccine. This rate is even higher among older travelers, as well as among those residing in the Western half of the U.S. Seeing people we know get vaccinated against COVID-19 clearly benefits travel sentiment. Those who know others who have already been vaccinated are likelier to have been or plan to be vaccinated themselves. These travelers are even more optimistic about their travel future and have begun planning travel specifically in anticipation of a wider vaccine rollout at higher rates than others. They are also more likely to have done any travel dreaming and planning in the last week, and have more trips planned for 2021 (3.0 vs 2.6).

AMERICAN TRAVELERS WITH FRIENDS OR RELATIVES THAT HAVE RECEIVED A COVID-19 VACCINE AS OF FEBRUARY 14, 2021



Millennials: 46.9%

Northeast: 55.7%

Question: Have any of your friends or relatives already received a COVID-19 vaccine?

(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



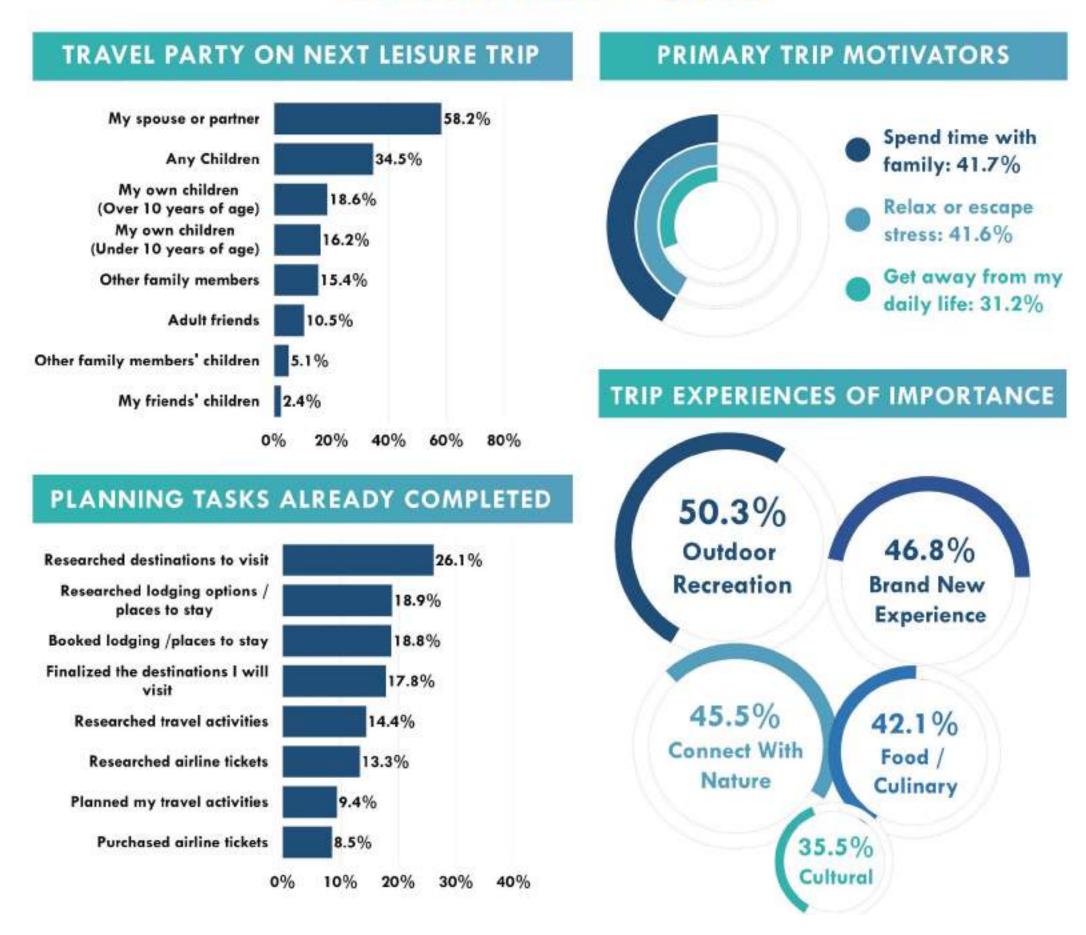
Americans' Next Leisure Trip

Right now, 80.2% of Americans have plans for one or more upcoming trips, with July still looking like the peak travel month this year. While nearly a quarter of the next road trips Americans will take will be within the next 3 months, the majority of American travelers still anticipate their very next air trip to be after June.

More than half of Americans have taken some action towards their very next leisure trip, including researching destinations to visit (26.1%), booking lodging (18.8%) and researching travel activities (14.4%). The primary motivators for these next leisure trips are to spend time with family, relax and escape stress and simply get away from the routineness of daily life. Thus, Americans express how important it is to have such experiences on their trips. In terms of other experiences they want to have on their next trip, outdoor recreation and connecting with nature, food and culinary and any brand new experiences overall are key for many.

AMERICANS' NEXT LEISURE TRIP

AS OF FEBRUARY 14, 2021



(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



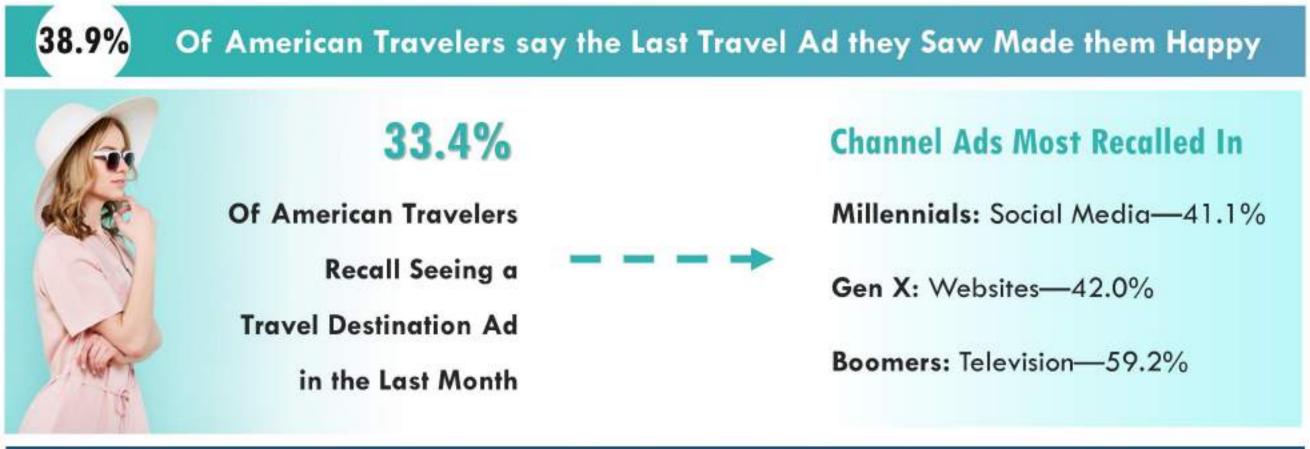
The State of Travel Advertising

What could inspire even more Americans to travel, and to travel more? Advertising certainly plays a role. This week, 55.8% report being highly open to travel inspiration. Well over a quarter of all American travelers—and over 35% of those Millennial age or younger—say that an advertisement has specifically motivated them to travel to a destination. In fact, 38.9% say the last travel destination ad they saw made them feel "happy" or "very happy."

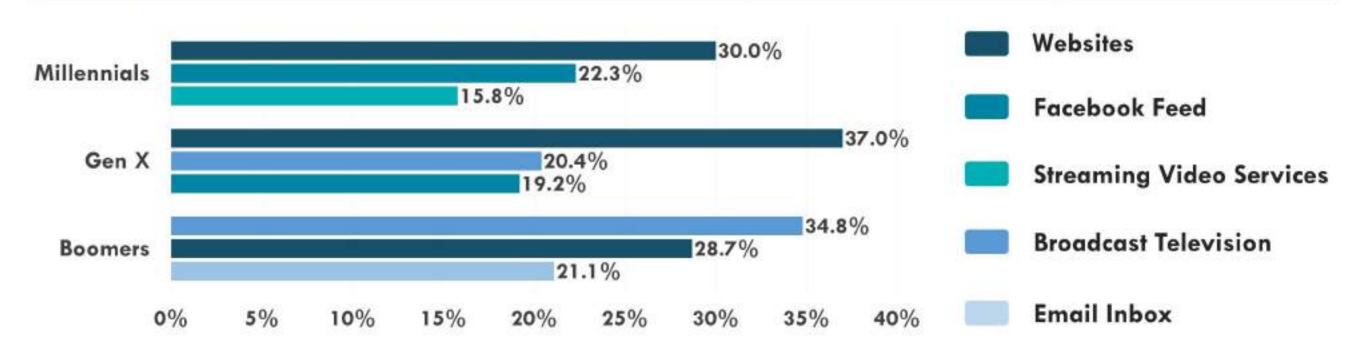
This week, one-third of American travelers recalled having seen an ad for a travel destination in the past month, most commonly on broadcast television, social media and elsewhere on the Internet. Where American travelers feel most receptive to travel advertising varies by age, but websites, social media (particularly Facebook), both broadcast and streaming television, and email are common.

THE STATE OF TRAVEL ADVERTISING

WEEK OF FEBRUARY 14, 2021



Top 3 Channels in which Americans are Most Receptive to Travel Advertising—by Generation



(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



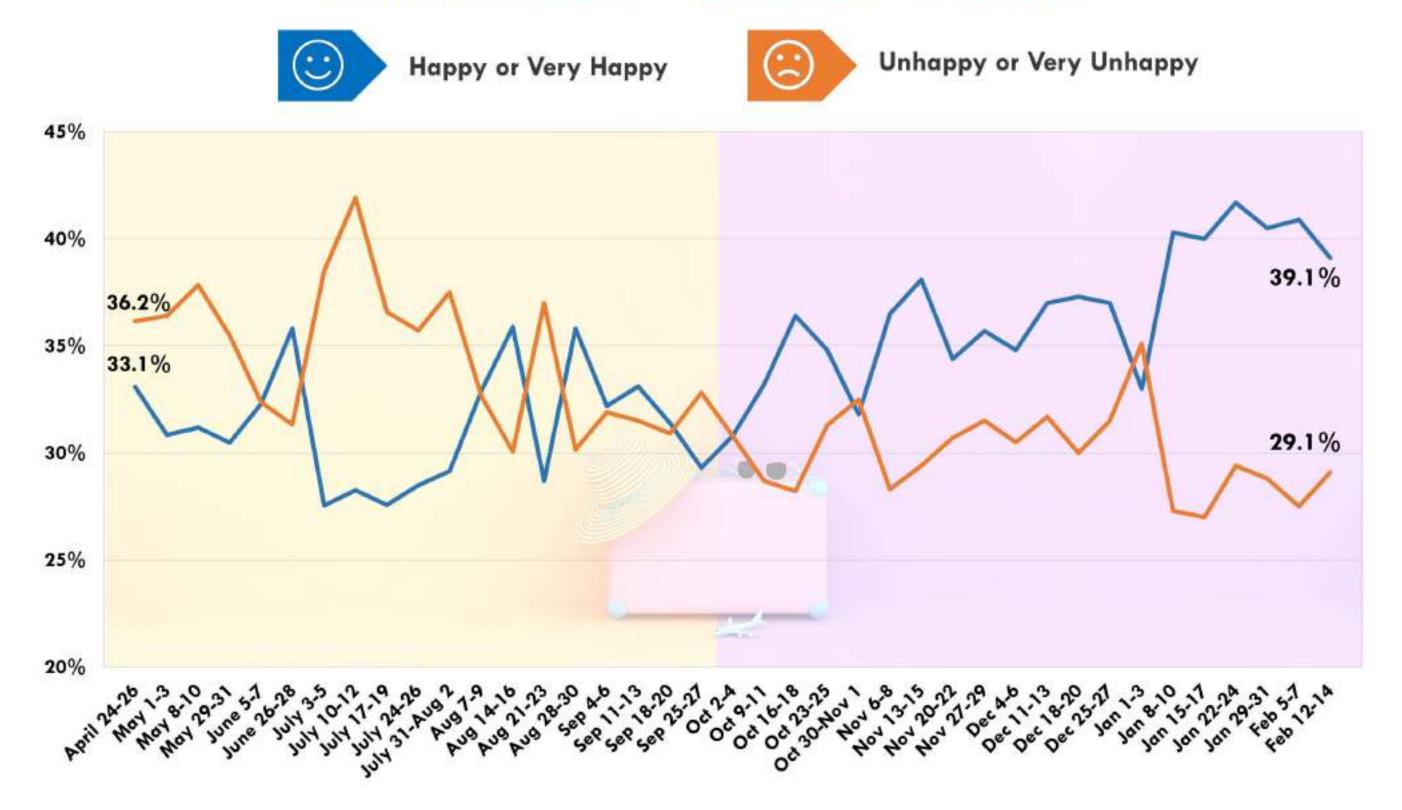
Feelings Seeing an Ad Promoting Tourism to Own Community

In addition to how they are feeling about traveling, how Americans perceive travel within their own communities is also critical to understanding the travel industry's recovery. This week 44.3% agree they feel comfortable going out for leisure activities where they live.

In addition, a larger proportion of Americans continue to say they would be happy to see their community advertised for tourism (39.1% vs 29.1% who would be unhappy). Those residing in urban areas are far likelier to feel happy about travel advertisements of their city compared to those residing in suburban or rural areas (50.0% vs 35.6% for rural and 34.7% for suburban).

FEELINGS SEEING AN AD PROMOTING TOURISM TO OWN COMMUNITY

APRIL 24, 2020 - FEBRUARY 14, 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 16-49. 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, 1,203, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)



1001101010000 Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing Highlights from the Week of February 15th

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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.

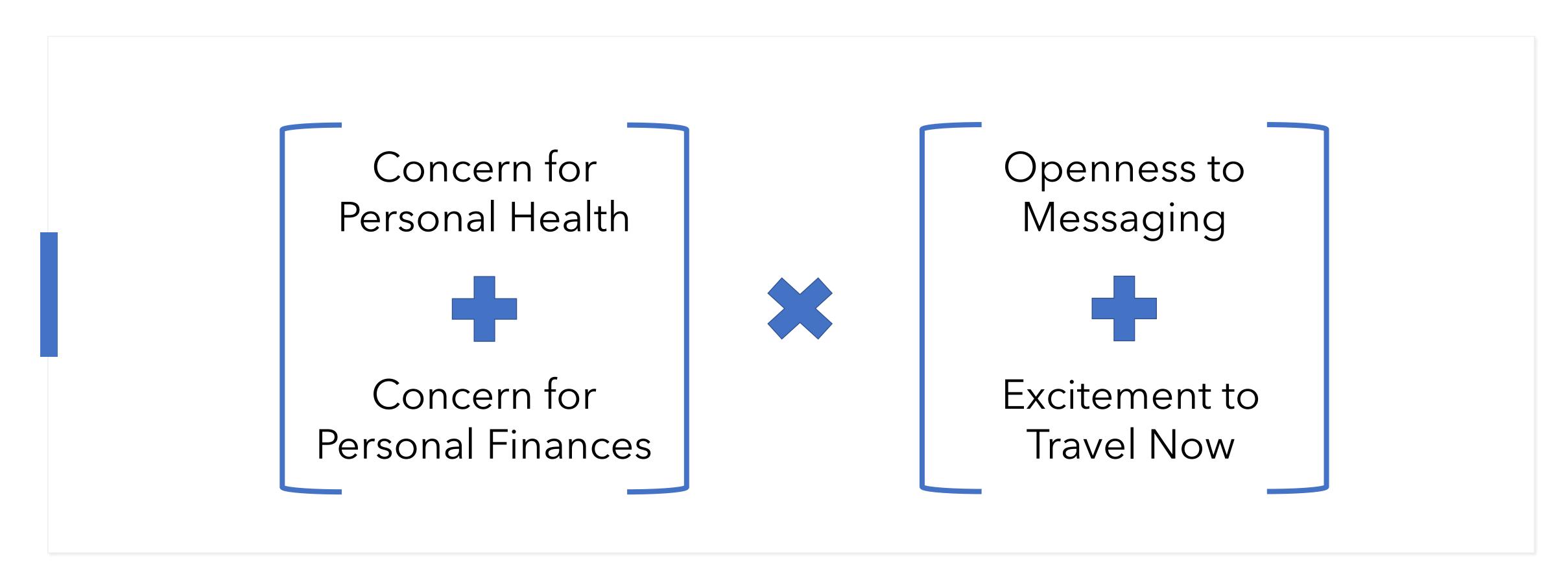


The goals are to identify:

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



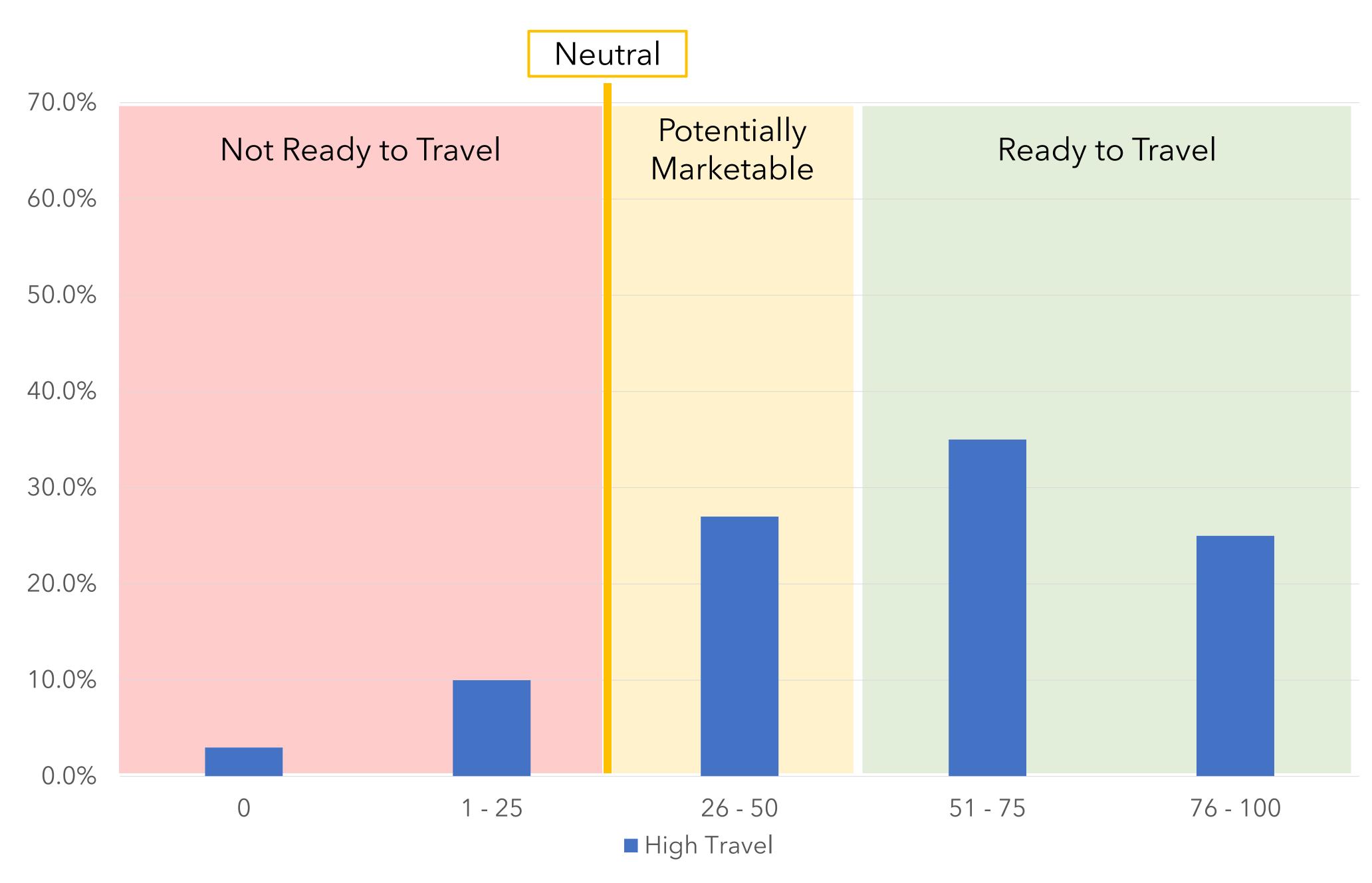
Predictive Index Formula



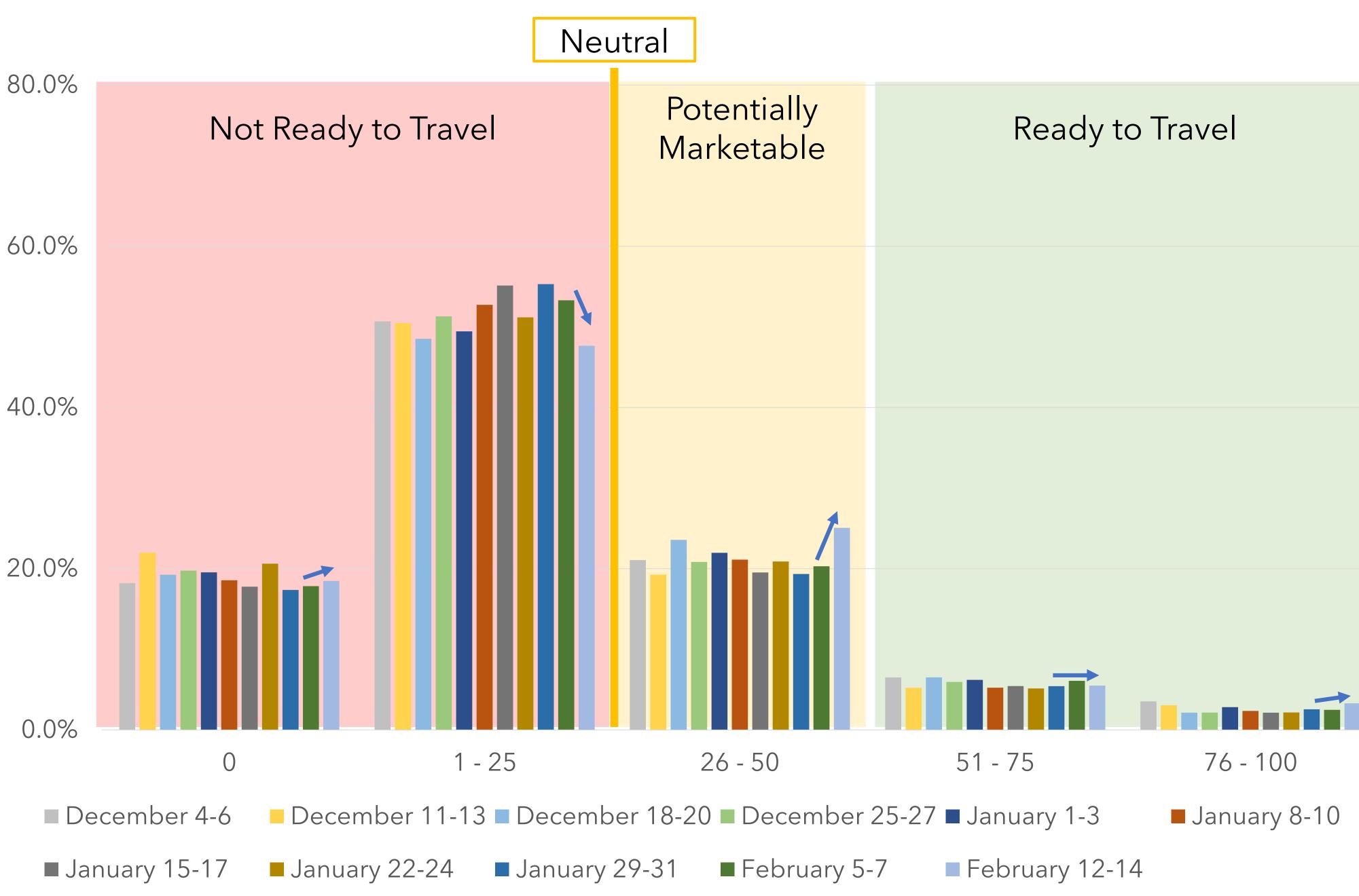
*Normalized to a 100pt scale

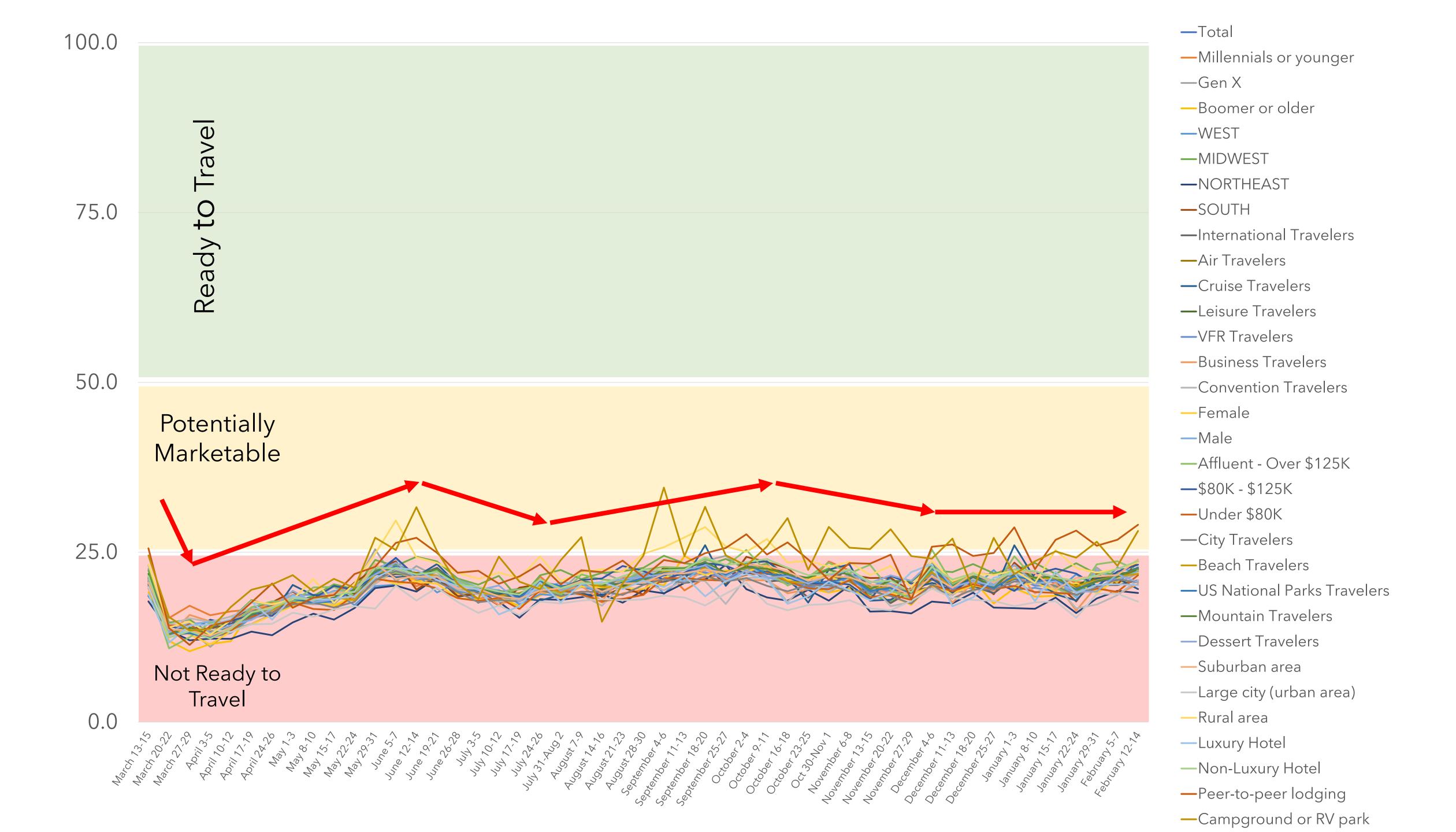


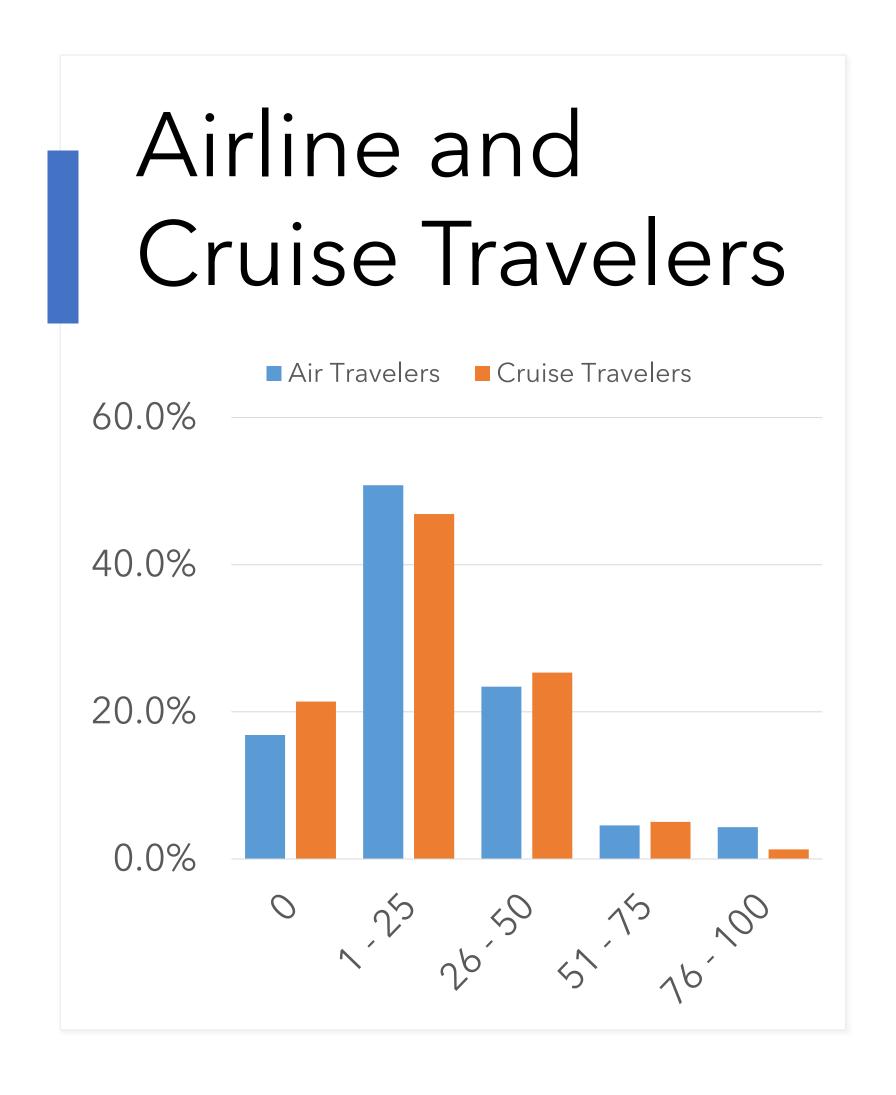
Healthy Travel Outlook

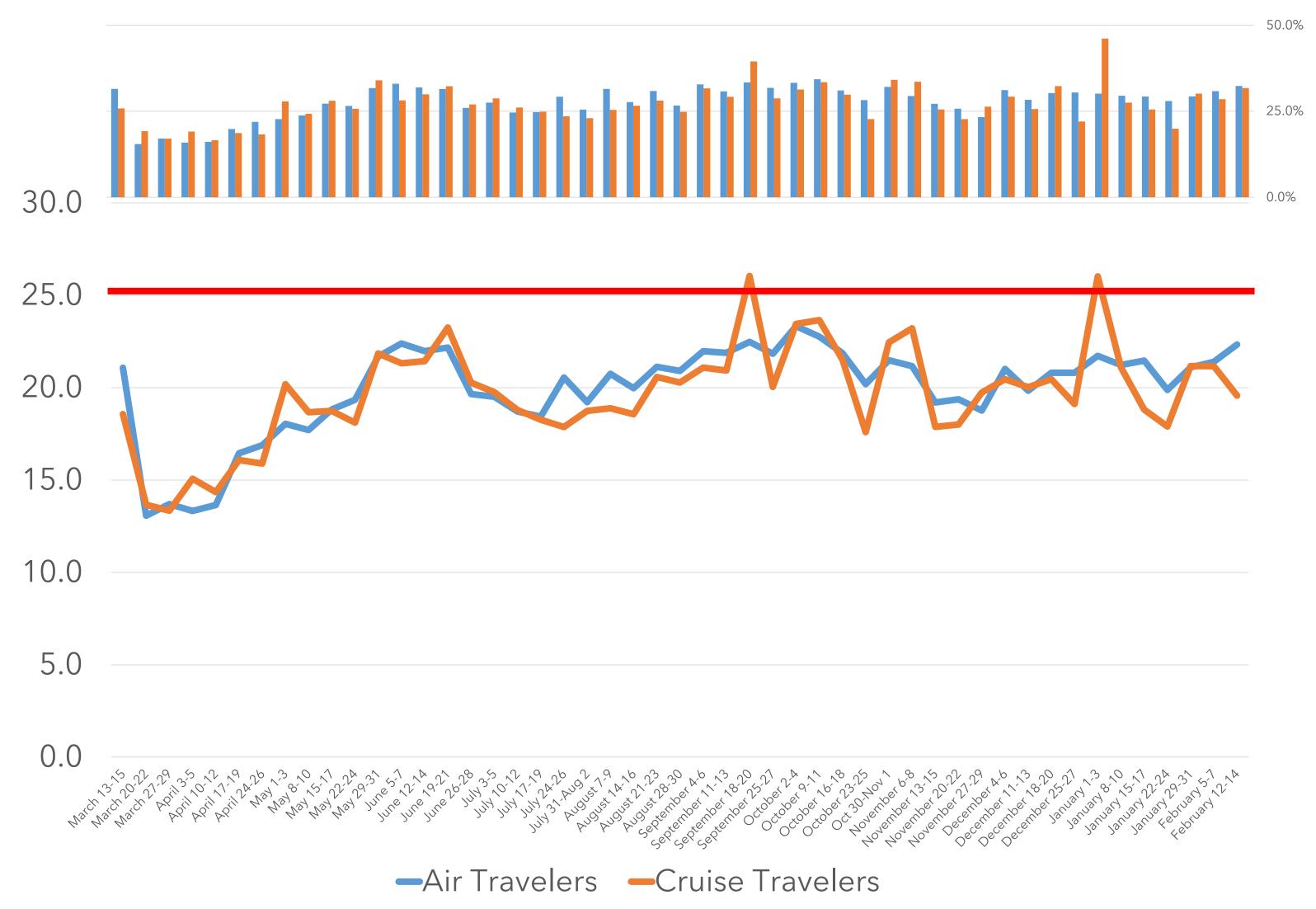


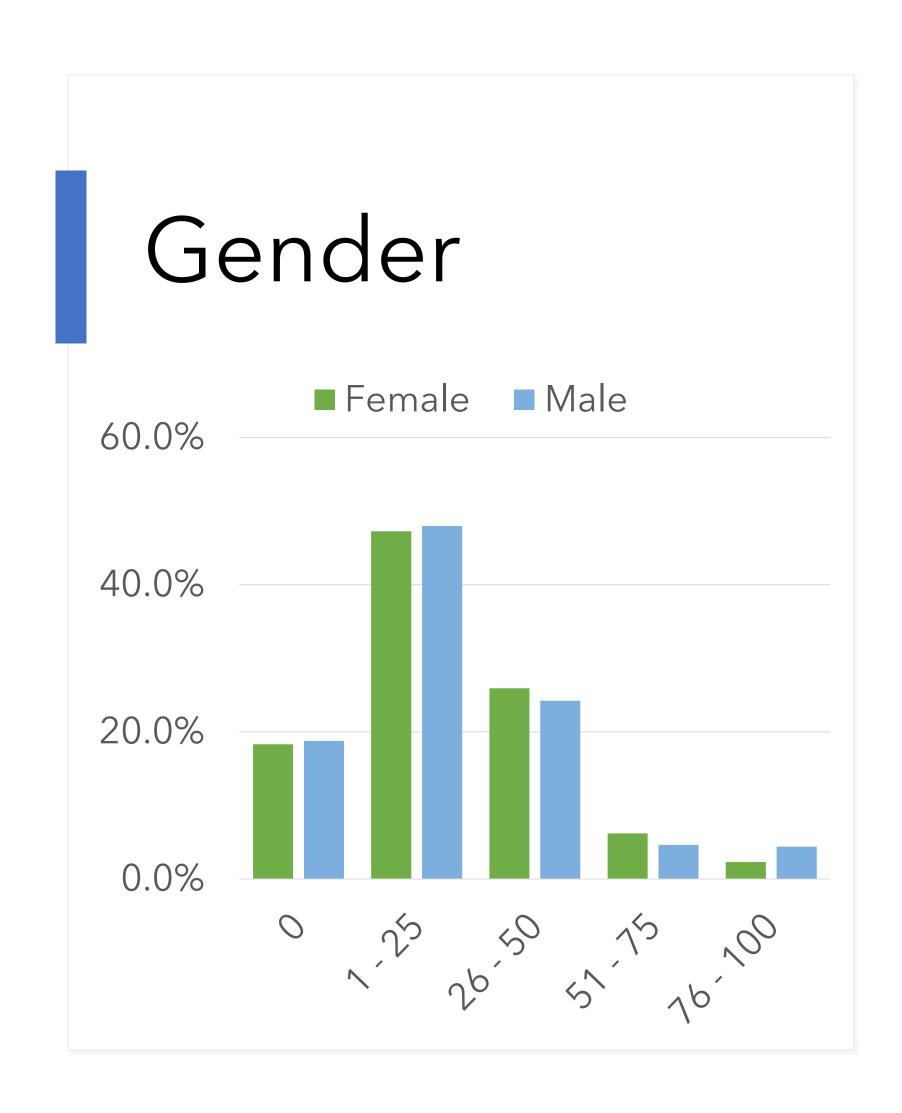
Travel Outlook

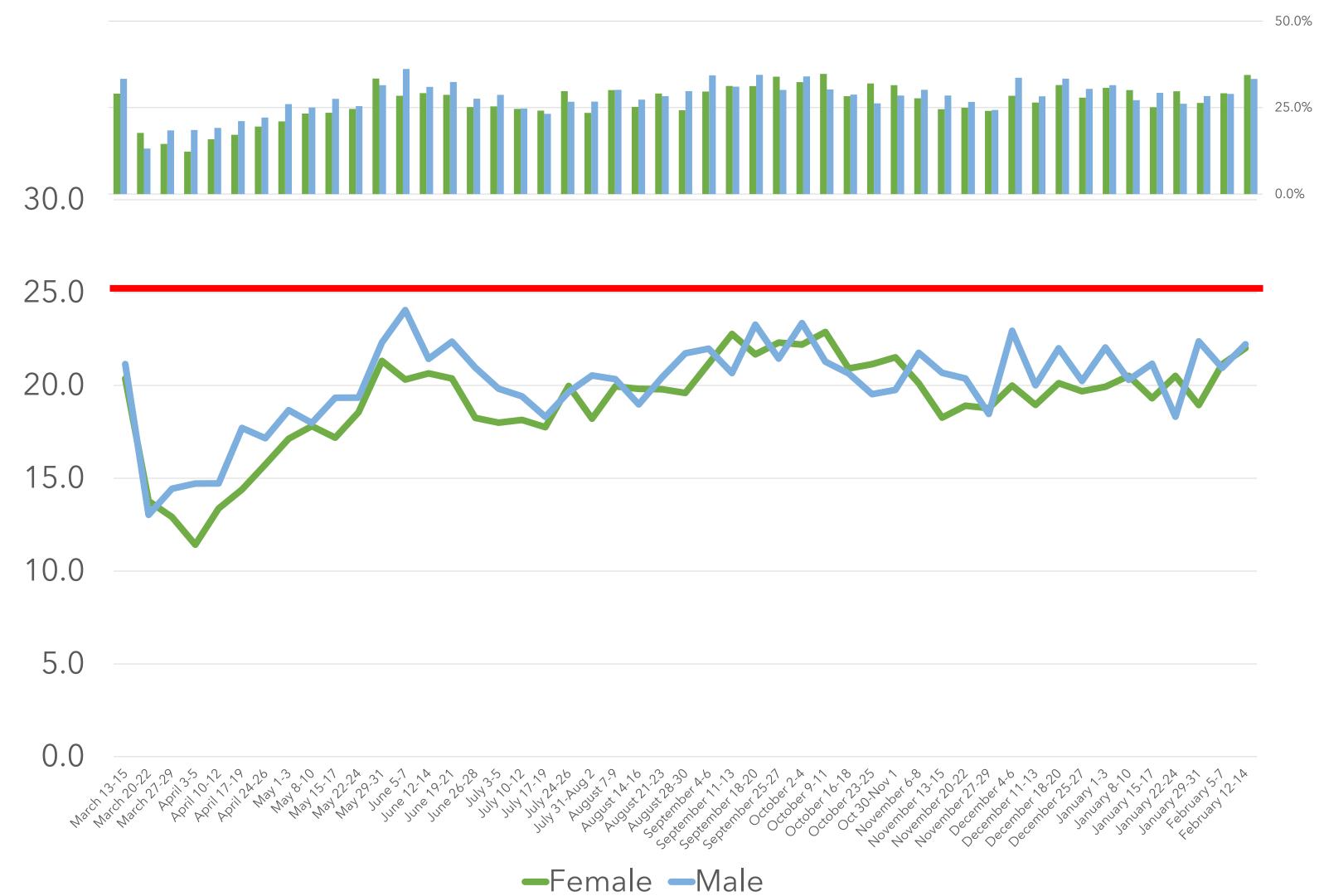


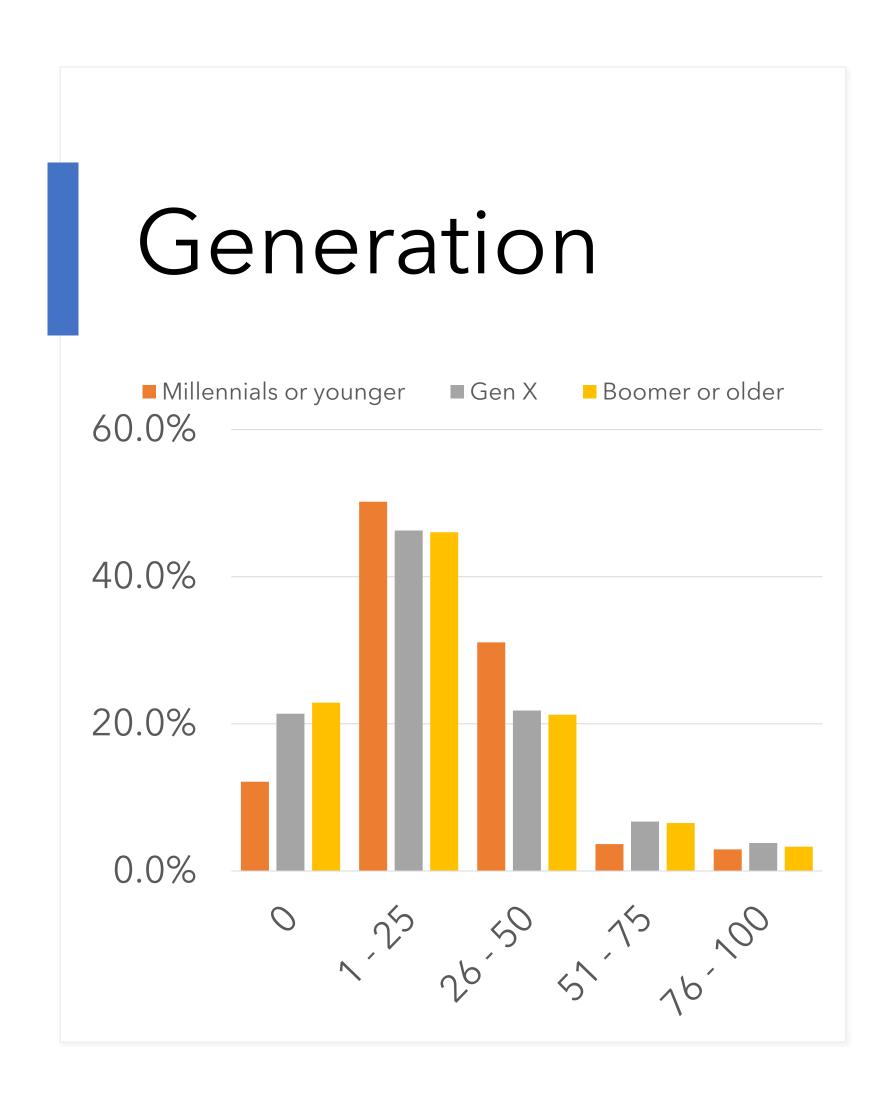


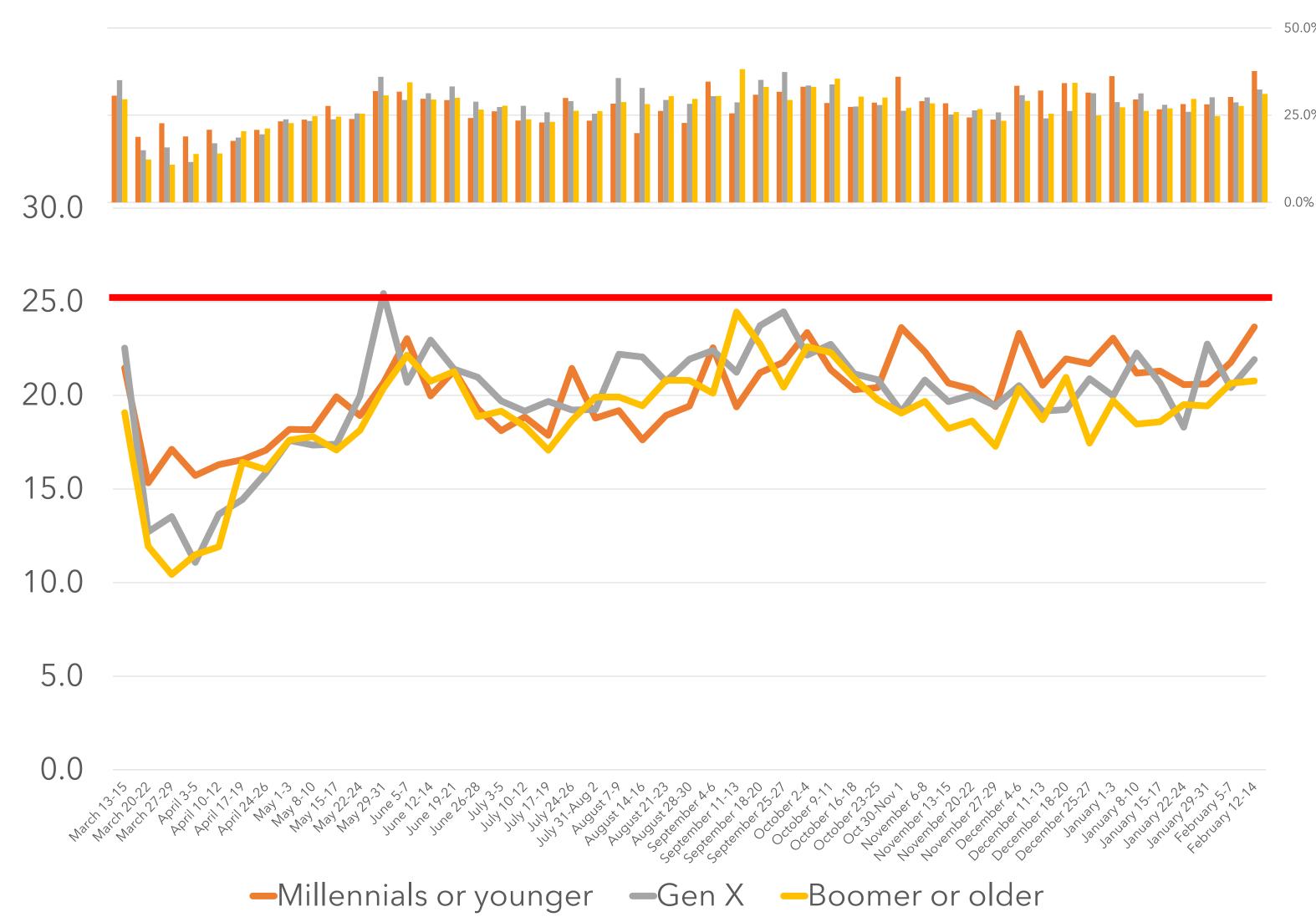


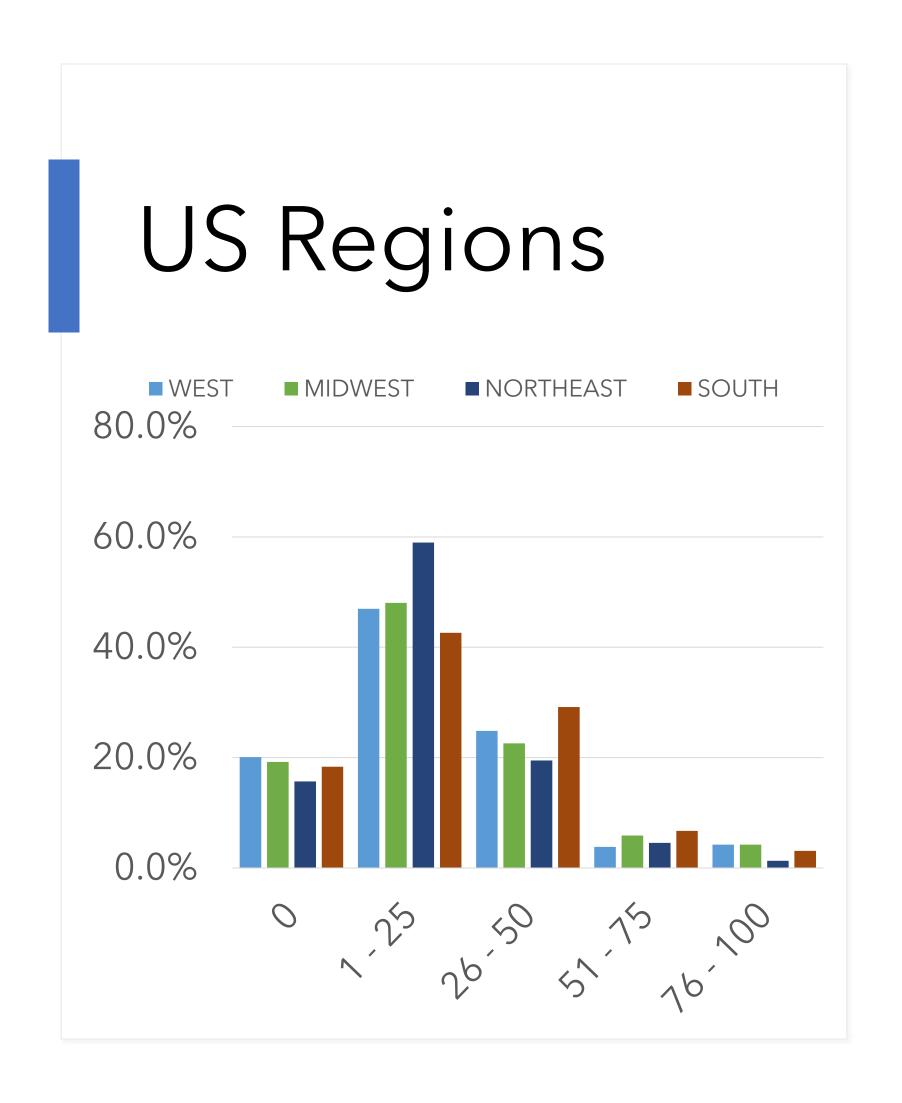


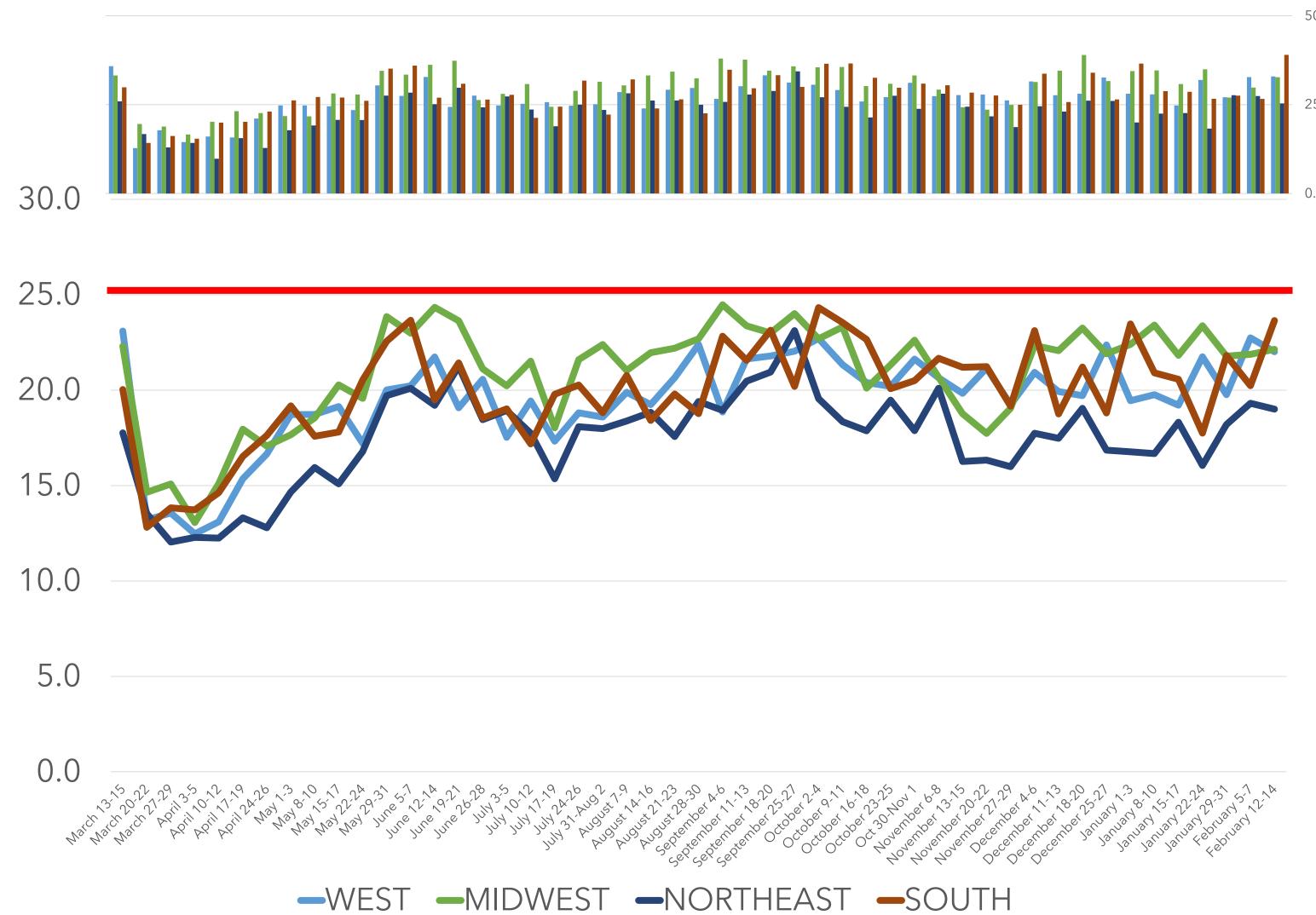


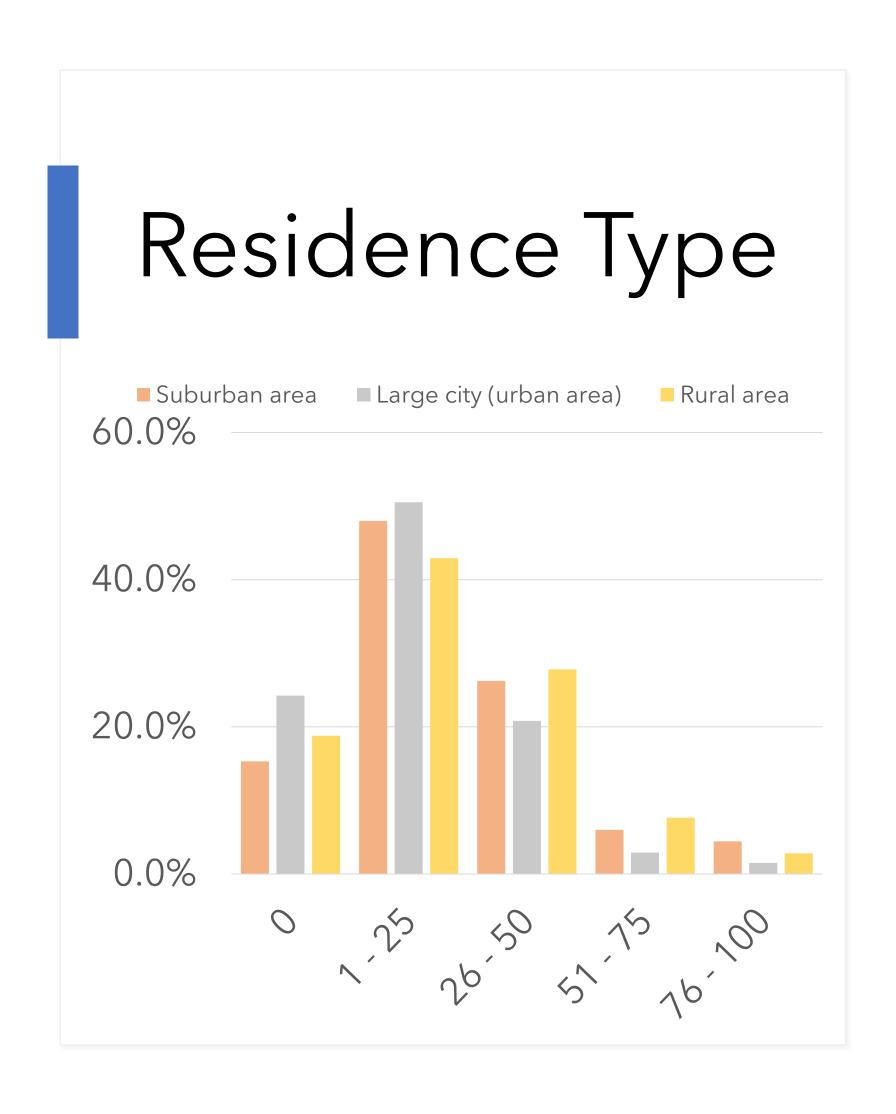


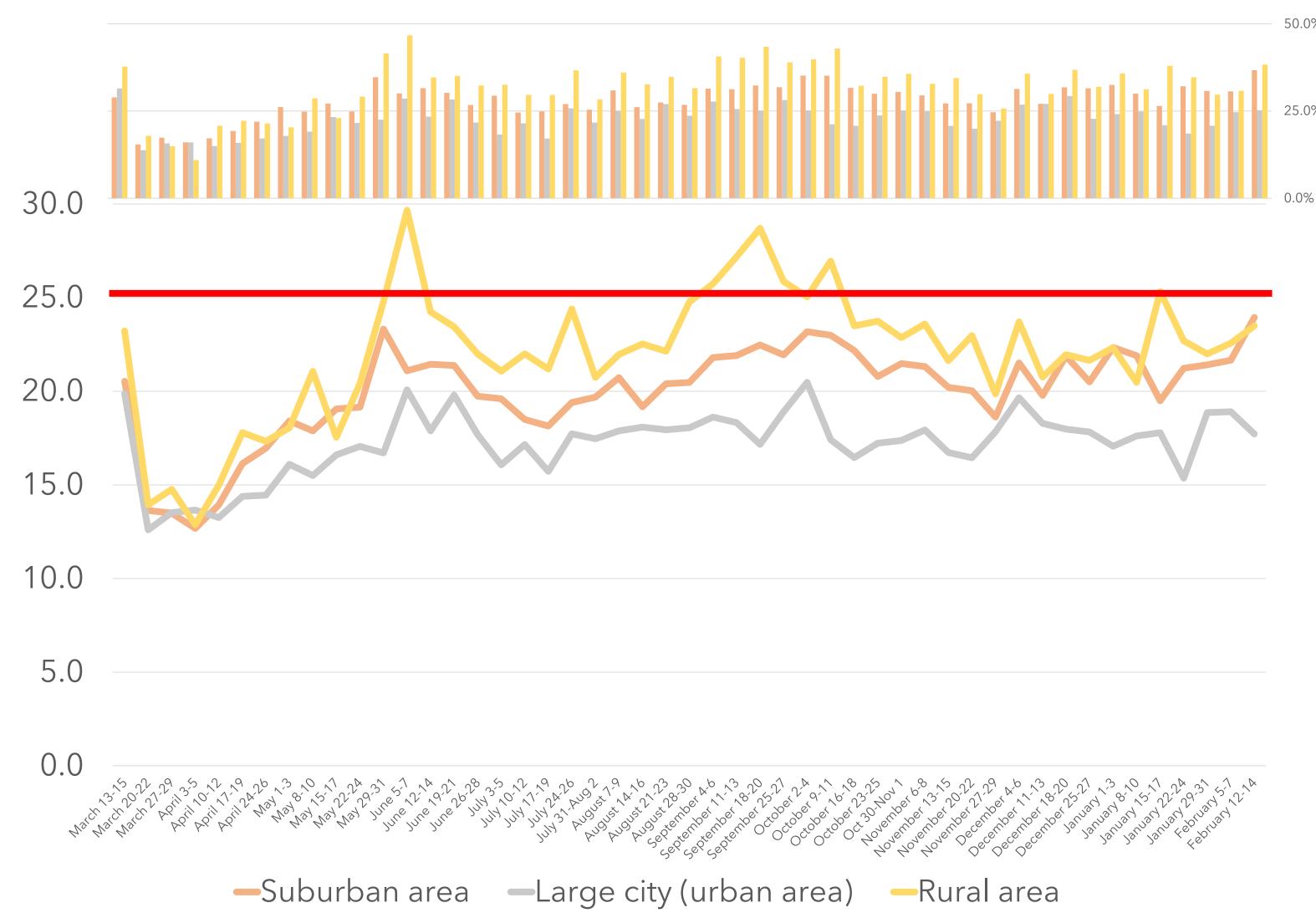


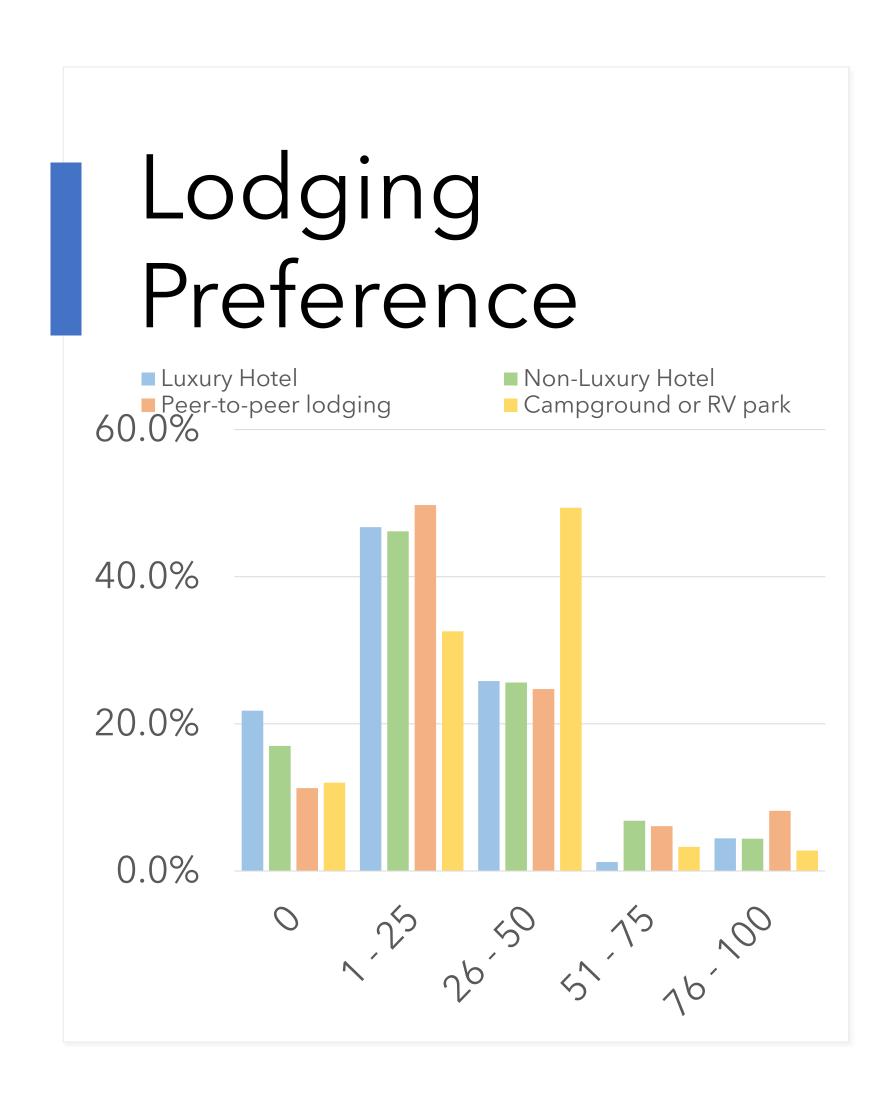


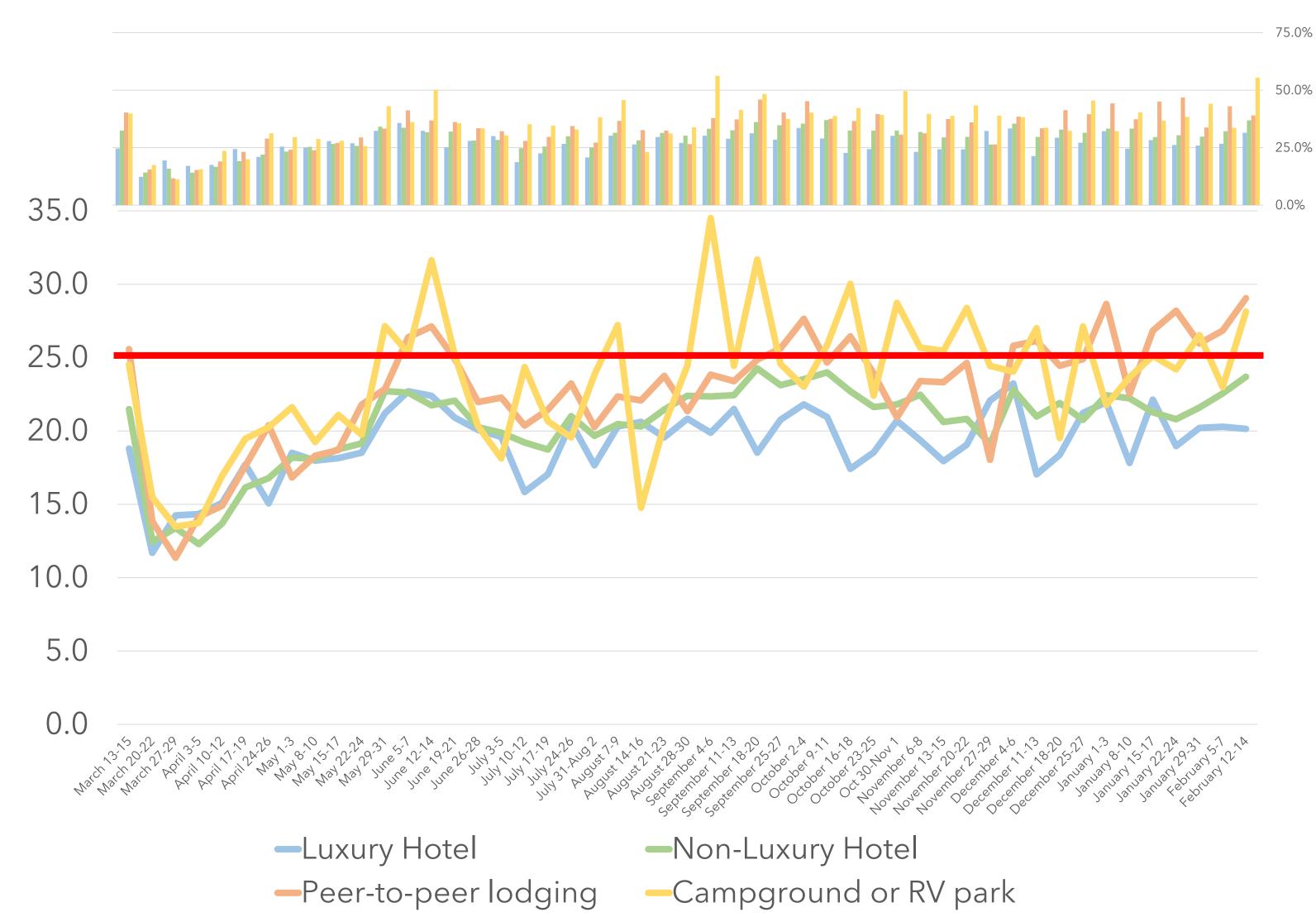














Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

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





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FEBRUARY 23, 2021

MARCH 2, 2021

MARCH 9, 2021

MARCH 16, 2021



MORE RESEARCH WE CAN PROVIDE

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