DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF FEBRUARY 1st, 2021



## **About Destination Analysts**

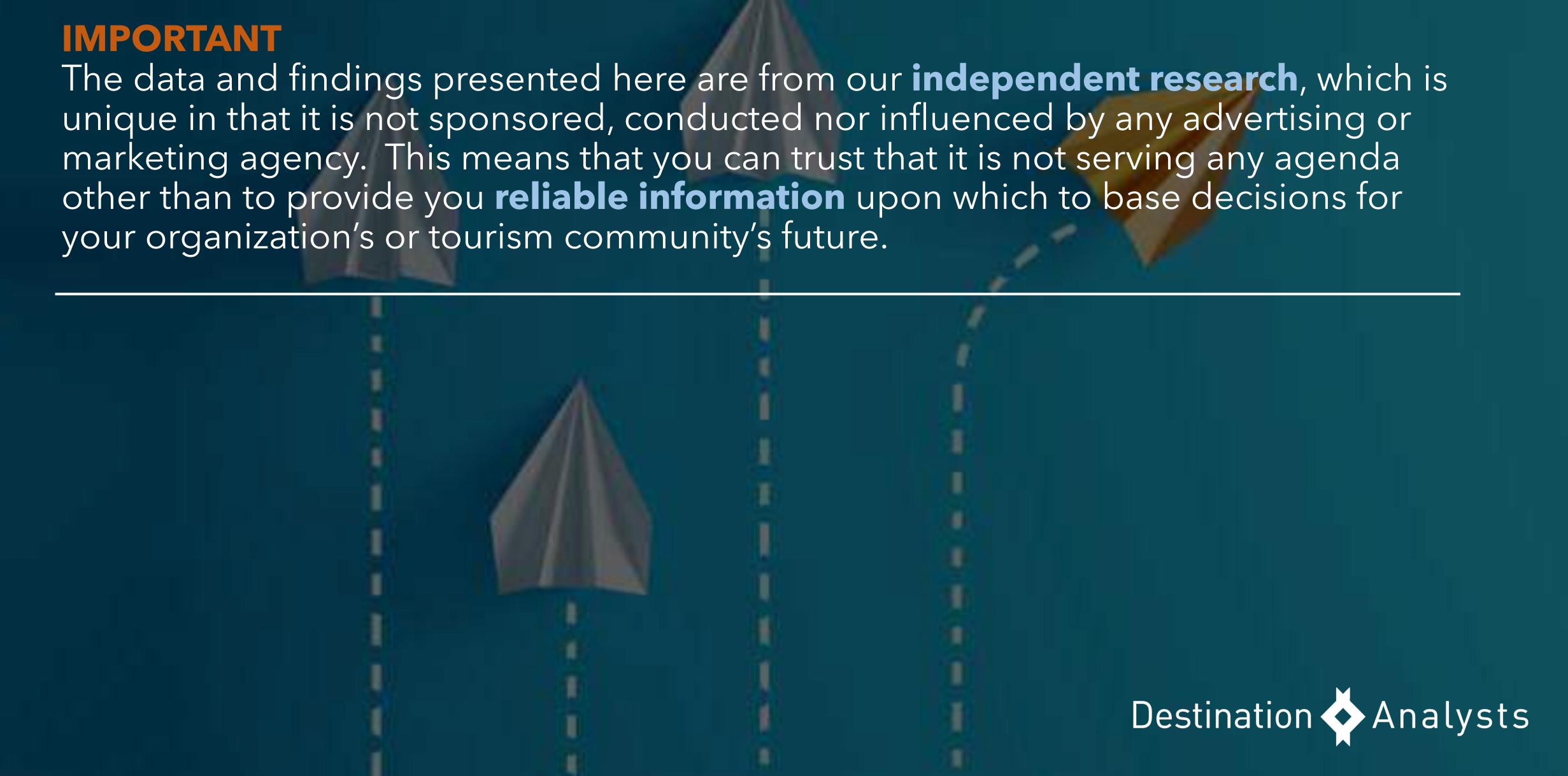
Destination Analysts is a market research company that offers businesses a breadth of insights, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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.







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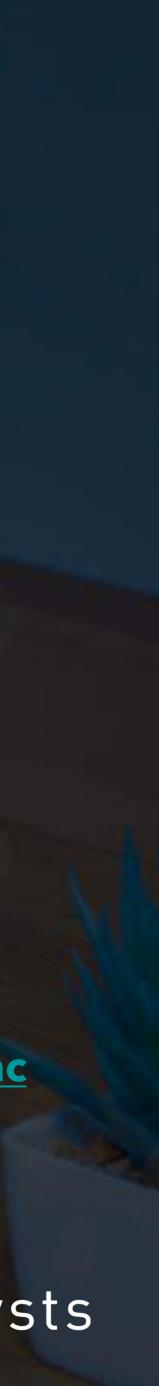
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Following this week's travel insights update, we will also hear from a panel of recent workcationers and schoolcationers on what's inspiring this type of travel and destination decisions in 2021.

> Sign up to attend the webinar on Tuesday, February 2<sup>nd</sup> at 11:00am ET here.

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





## Key Findings for the Week of February 1<sup>st</sup> **Please cite Destination Analysts when using or distributing this data**











## How Far Are We From Normal?

After heightening last week, Americans' anxiety about personally contracting COVID-19 (6.8/10), their friends or family contracting the virus (7.3), the pandemic's impact on their personal finances (6.0) and the national economy (7.6) lessened this week. More Americans are now feeling the coronavirus situation in the United States will star relatively the same over the next month, at 35.0% up from 26.9% since last week. Meanwhile, the percent who feel things will get worse (34.3%) and the percent who feel things will get better (30.7%) both decreased. Americans' perceptions of the safety of travel and leisure activities continue to be among the best they have been during the pandemic. More than half of Americans no longer view museums and indoc attractions, theme parks and outdoor attractions, vacation home rentals, hotels, restaurants, and shopping as unsafe.

However, Americans still generally feel some distance from "normal." Right now, the abilities to work/make money, be happy and enjoy relationships with family are where the greatest proportions of American travelers feel closer to normal. Unfortunately, just 21.4 percent feel more normalcy around being able to travel as they like. (NOTE: Be sure to register for our webinar Tuesday for further analysis into which segments are feeling the most normal).



)-	<b>HOW FAR ARE WE FROM NORMAL?</b>		
:†	AS OF JA	NUARY 31, 2021	
	% of Americans Rating	Normalcy 8-10 on a 10-point se	cale
ay			
	Abilty to work/make money	<b>43.9</b> %	Closer to Normal
	Be happy	<b>39.4</b> %	
	Enjoy relationships with my family	37.6%	T
	Enjoy relationships with friends	31.3%	
oor	Enjoy living in my community	30.7%	
	Feel safe	28.3%	
	Enjoy restaurants	24.6%	1
	Travel as I like	21.4%	i
	Attend public events	18.1%	Further from
т А.	<b>o</b> %	20% 40% 60%	Normal

Question: Now let's talk about how close to (or far from) your life is to normal (i.e., being totally unaffected by the COVID-19 situation.) For each, tell us about your life using the scale where 1 equals "Still very far from normal" and 10 equals "Already completely normal."

(Base: Wave 47 data. All respondents, 1,209 completed surveys. Data collected January 29-31, 2021)



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Vaccines play a large role in a return to normal.

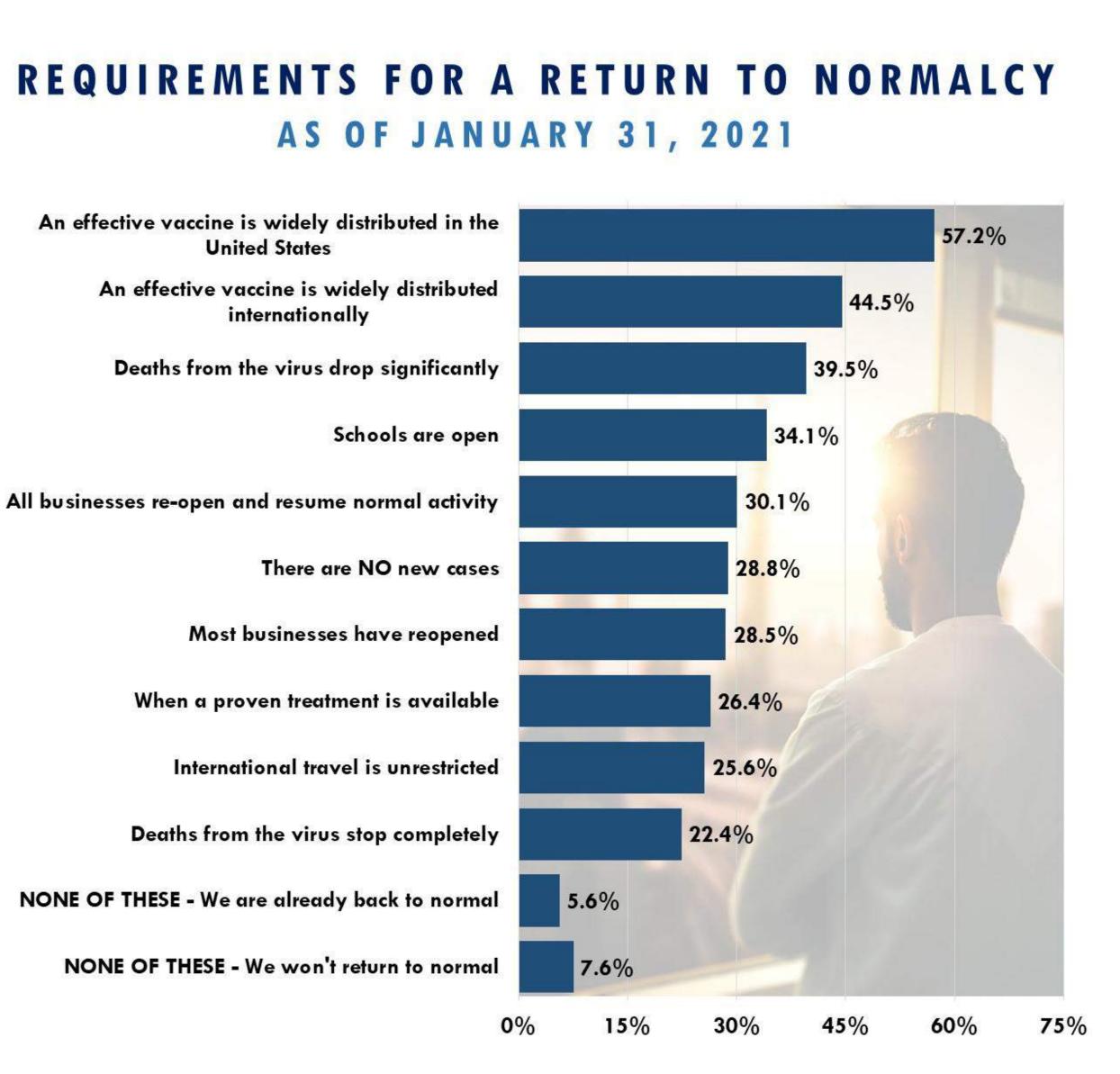
When asked what needed to happen before they feel things have returned back to a normalcy they are comfortable with, there was the most agreement with having an effective vaccine widely distributed in the United States (57.2%), followed by an effective vaccine widely distributed across the globe (44.5%). About twothirds of Americans travelers feel the available vaccines are safe and a majority of American travelers who have not yet received the vaccine expect to be vaccinated by June (57.9%).

Question: Please think about the end of the Coronavirus situation. In your mind, which of the following will NEED TO HAPPEN before you feel things have returned back to a normalcy you are comfortable with? (Select all that apply)

(Base: Wave 47 data. All respondents, 1,209 completed surveys. Data collected January 29-31, 2021)



## AS OF JANUARY 31, 2021



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## Americans' Travel State-of-Mind

While excitement for travel in both the short (5.5/10) and longer term (5.9) decreased slightly this week and half still report they would feel guilty traveling right now, Americans overall state-of-mind around travel is at levels last seen in Fall 2020, before the most recent surge in cases.

This week, 56.6% say they are in a readiness mindset when it comes to travel. Americans remain in a period of being the most open to travel inspiration that they have been since the onset of the pandemic 11 months ago. Although 56.1% still don't want travelers in their own community right now, 40.5% said they would be happy to see an ad promoting their community as a place for tourism when it's safe.



Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)

(Base: Waves 12-13 and 15-47. All respondents, 1,257, 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, 1,205, 1,200, 1,205, 1,205, 1,203, 1,203, 1,203, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, and 1,209 completed surveys.)

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## AMERICANS' TRAVEL STATE-OF-MIND MAY 29, 2020 – JANUARY, 31 2021



At this start of a new month in the year, the average American traveler is still reporting they will take 2.8 leisure trips in 2021 (down from 4.9 in 2019).

Just under half of American travelers say they will take at least one trip in the next three months (February-April). This rate of travel and the average number of trips for this period is greater than the January-March period. Many of these trips will remain regional, within 250 miles of the traveler's home—although cities as a trip destination have grown in popularity (40.9%), surpassing small towns and rural destinations (31.6%).

(Base: Wave 47 data. Respondents expecting to travel in the next three months, 565 completed surveys. Data collected January 29-31, 2021)



### AMERICAN TRAVEL IN THE NEXT 3 MONTHS (FEBRUARY—APRIL 2021) **AS OF JANUARY 31, 2021**

Expect to take at least 1 trip (Up from 37.5% January 4<sup>th</sup>)

Average number of trips (Up from 0.7 January 4th)

### OF THOSE TRAVELING IN NEXT 3 MONTHS



Average Travel Spending = \$1,354 (Down from \$1,376 January 4<sup>th</sup> )

**Trip Accommodations:** 

Hotels: 61.4%

Home of Friend/Family: 28.6%

Vacation Rentals/ Airbnbs: 14.6%

**Destinations:** 

Cities: 40.9%

Small towns/ rural: 31.6%

Beach: 31.4%





1.1





















Two-thirds of American travelers did some kind of travel planning activity in the last week, from making travel reservations (11.2%) to researching travel ideas online (27.6%) to simply day dreaming about a vacation (33.2%).

Looking at where Americans dreamt of visiting in the last week, many had their minds on sun and fun (Florida, Hawaii, California, Jamaica), Europe, iconic cities (Paris, New York, Las Vegas) as well as outdoor destinations (Alaska, Wyoming).





### Question: What destination(s) did you day-dream about visiting?

(Base: Wave 47 data. Respondents daydreaming about travel destinations, 402 completed surveys. Data collected January 29-31, 2021)



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1001101010001101 0011810001000 (010000110)1001101010000 -11001101010 **Coronavirus Travel Sentiment Index** Measuring the Potential Influence of Travel Marketing Highlights from the Week of February 1st 0 1 **[**\_0 1 **]** 1 1 0 0 1 1 0 1 0 1 0 0 0 1 1 0 LNP 0101**1-0**00100**0001110**1010 10110001001101000110/



## What is a Predictive Index?



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

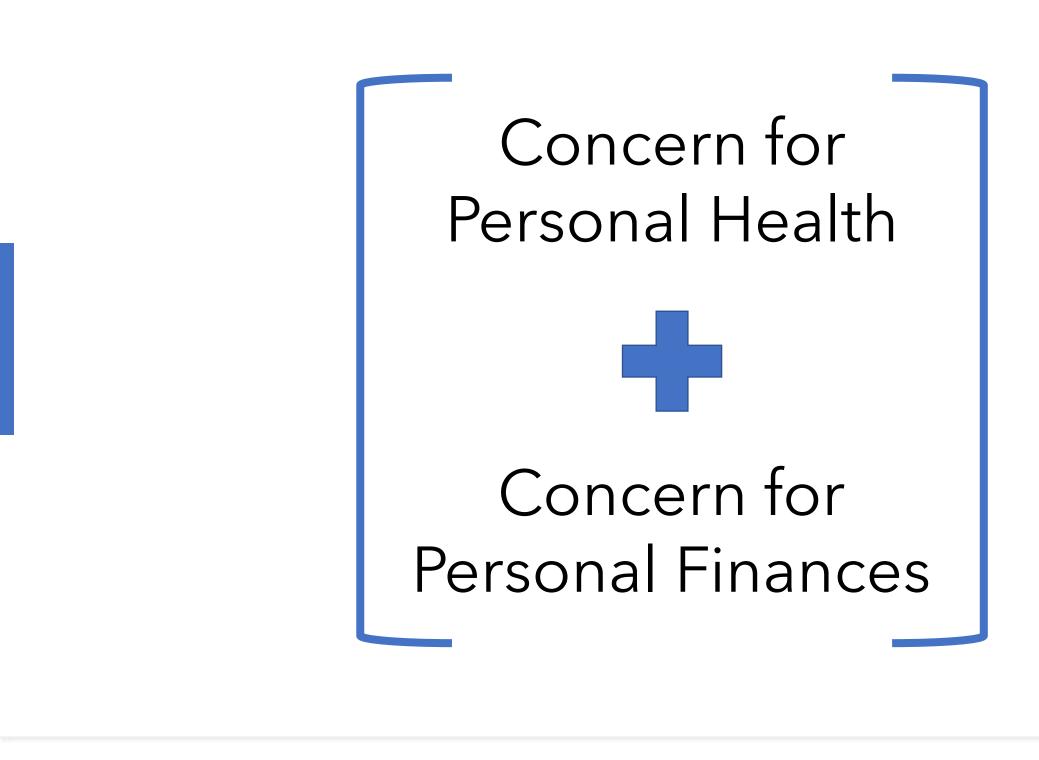
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make datadriven predictions.

The goals are to identify:

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

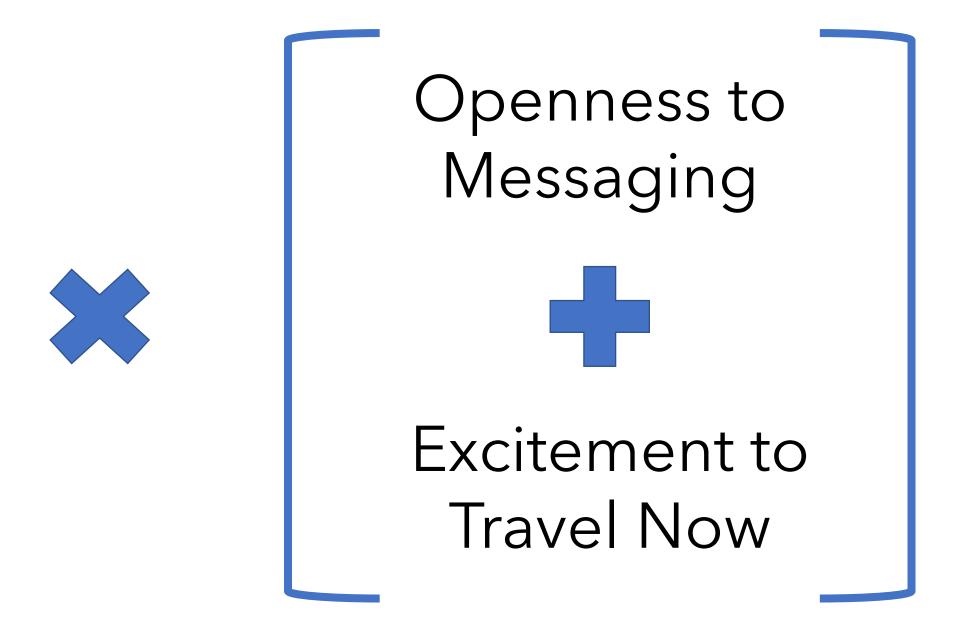


# Predictive Index Formula



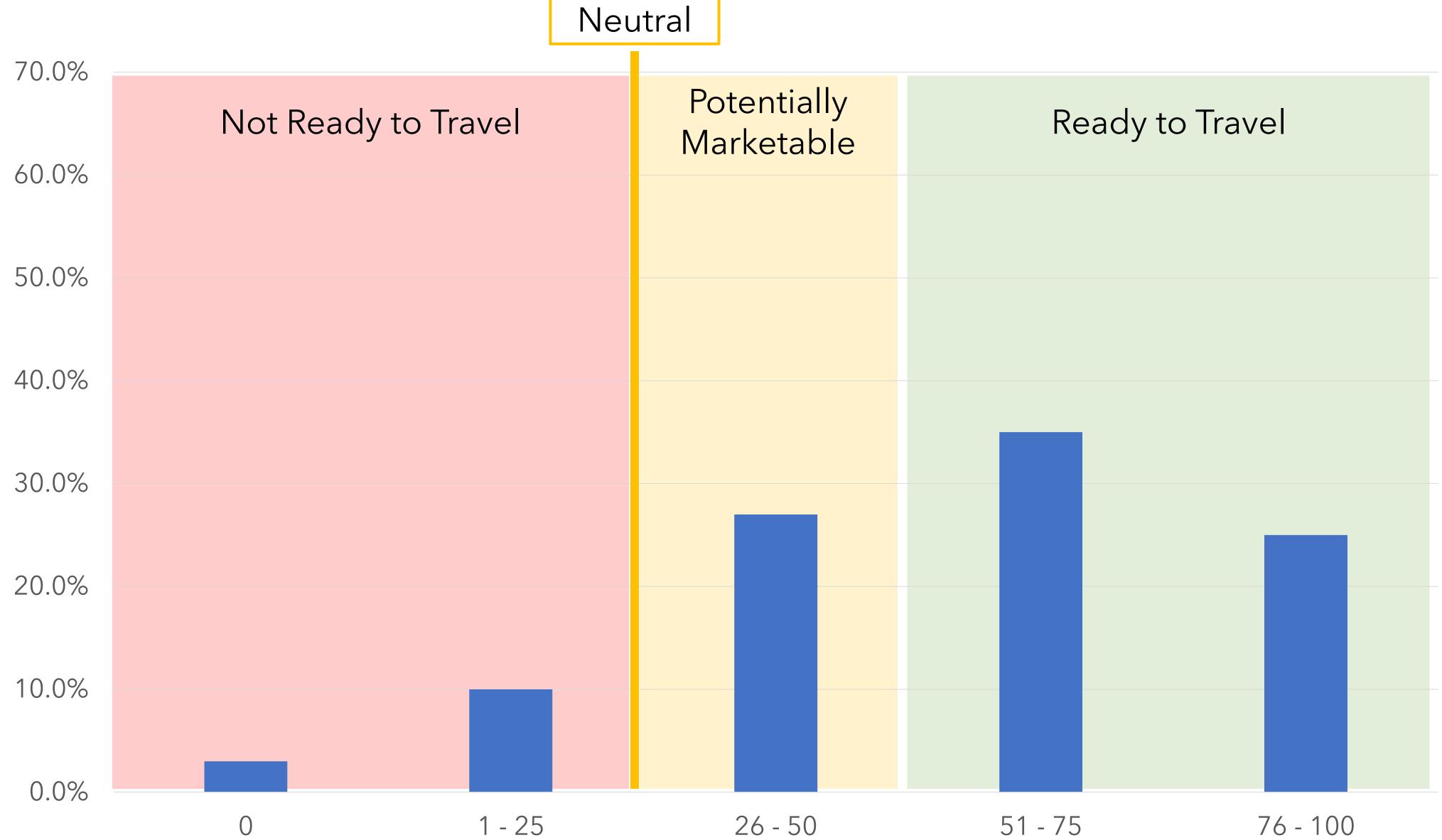
## \*Normalized to a 100pt scale







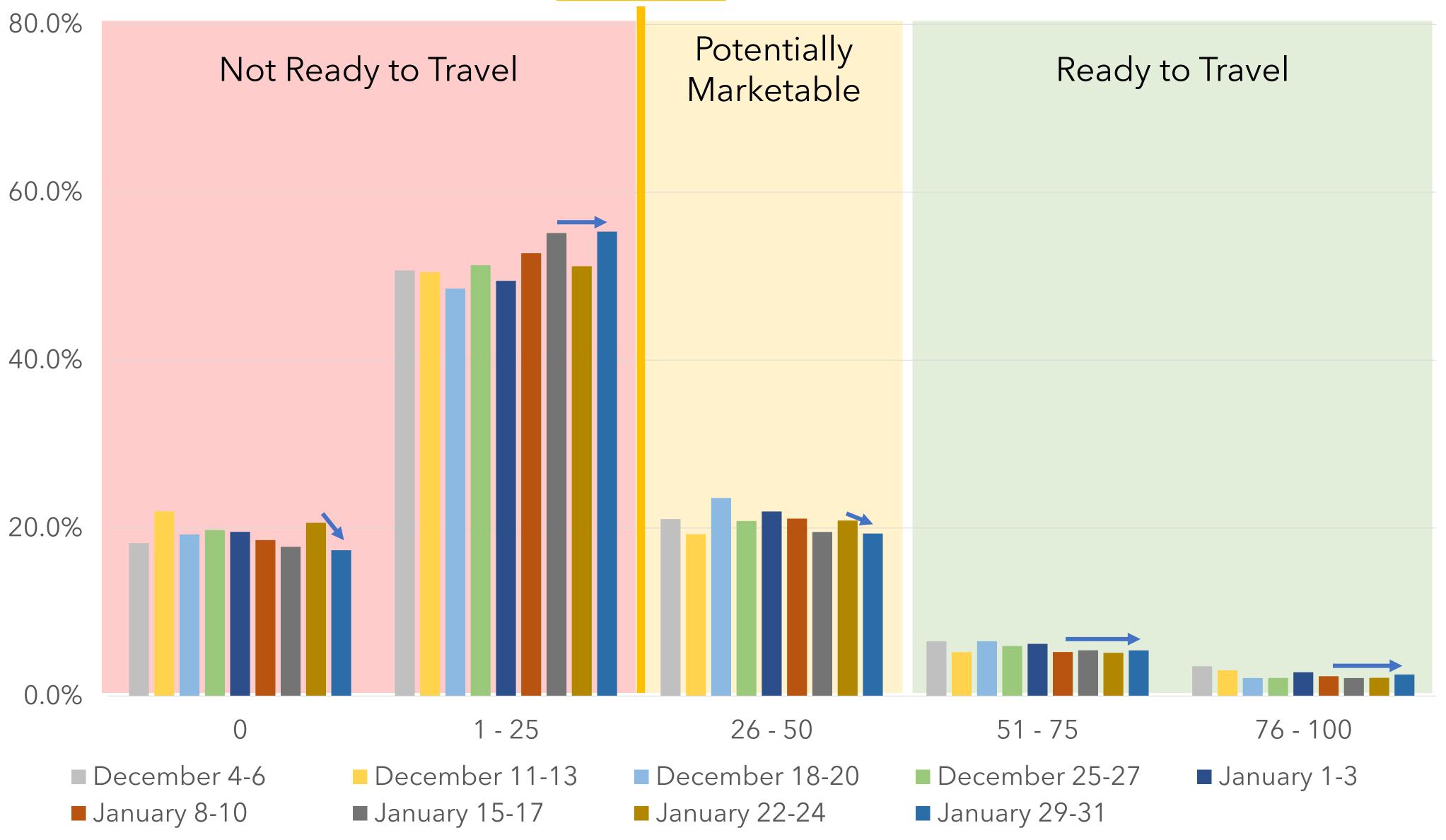
## **Healthy Travel Outlook**



High Travel

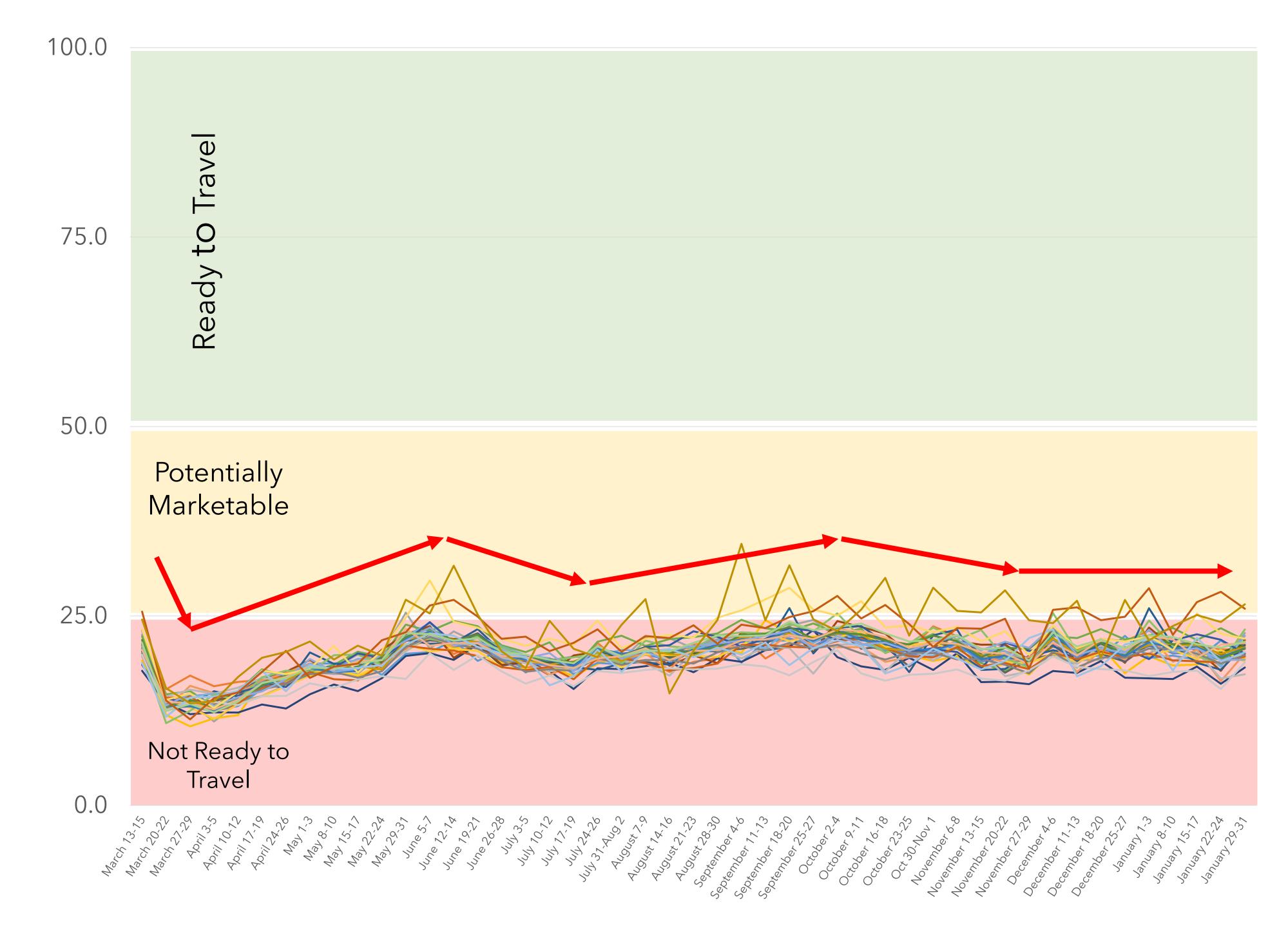


## Neutral







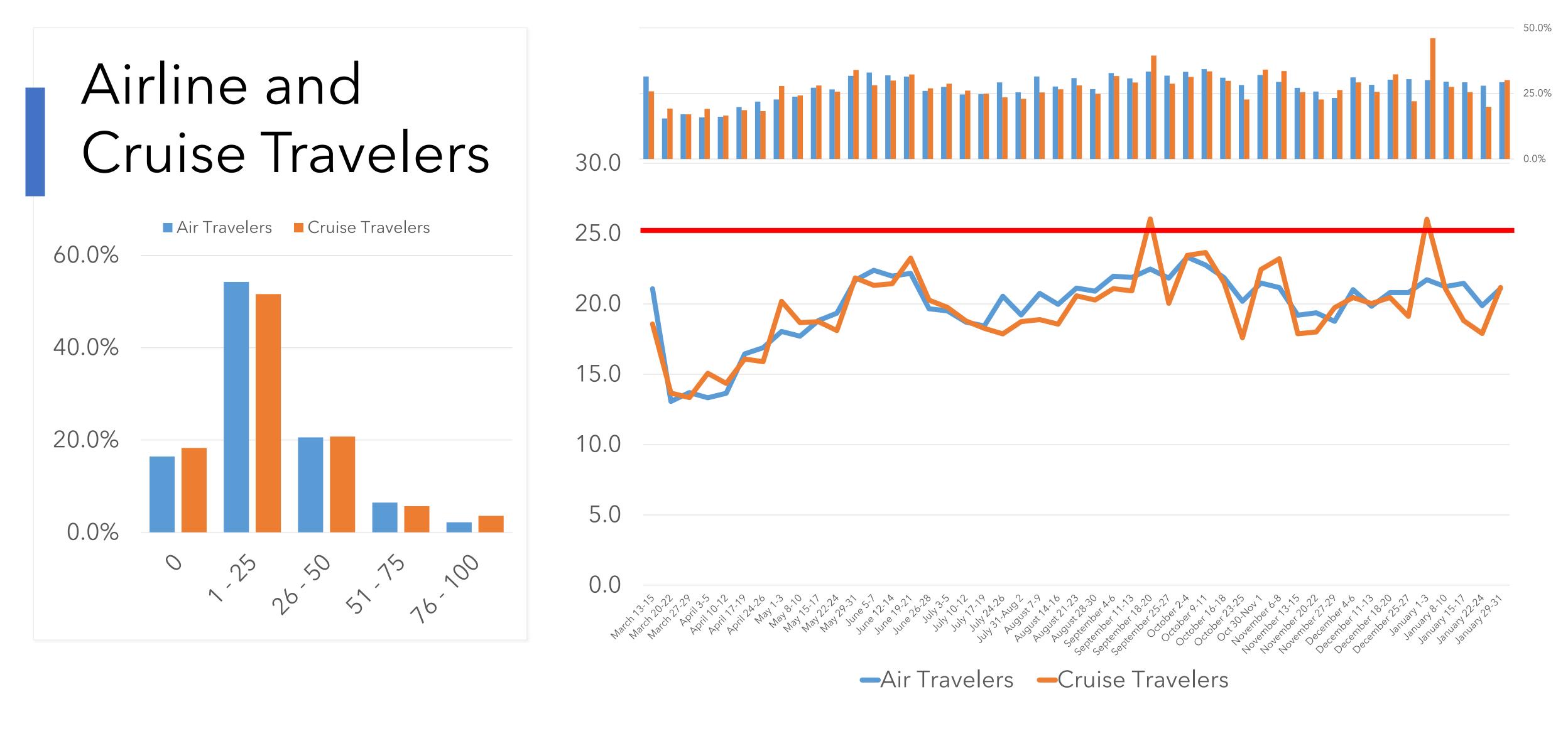


—Total

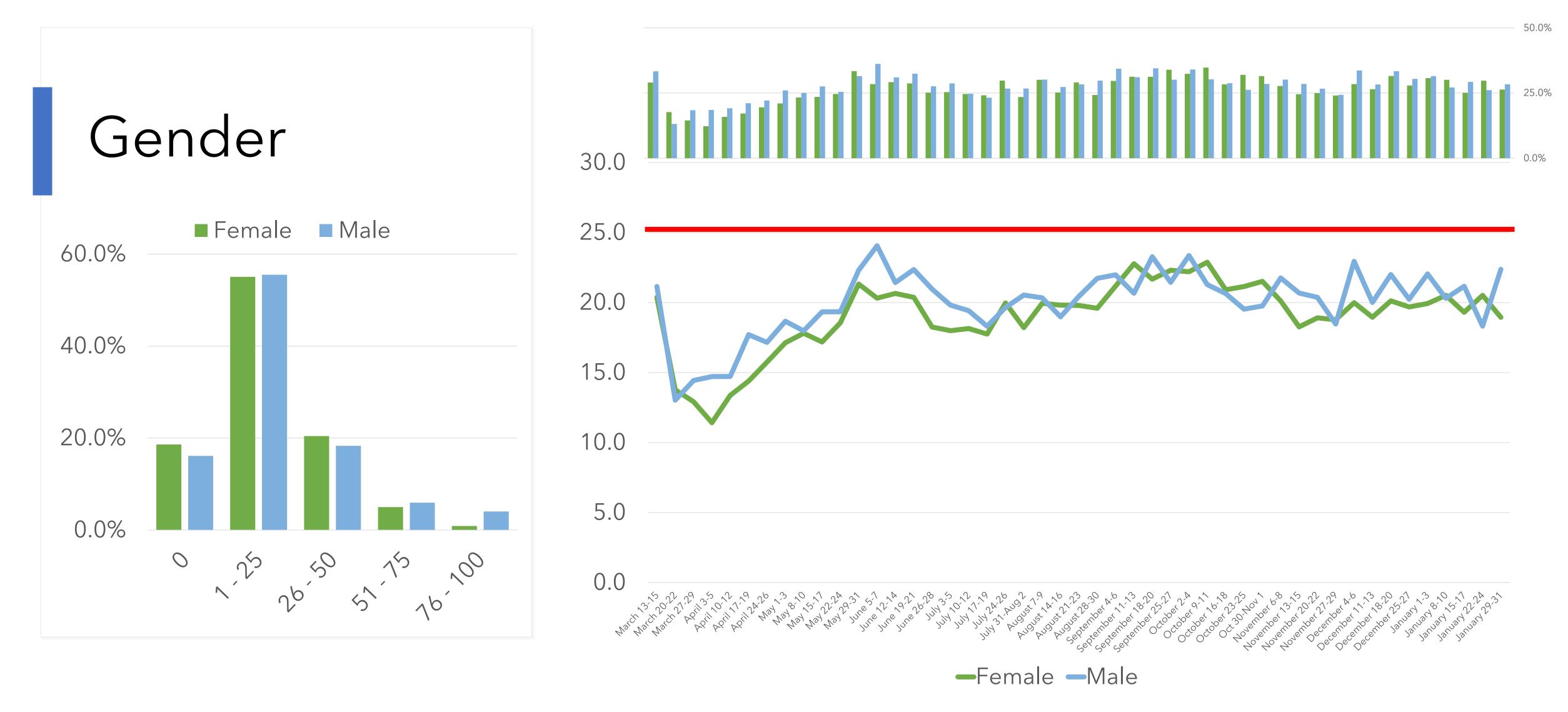
- -Millennials or younger
- —Gen X
- -Boomer or older
- -WEST
- -MIDWEST
- -NORTHEAST
- -SOUTH
- —International Travelers
- —Air Travelers
- -Cruise Travelers
- -Leisure Travelers
- -VFR Travelers
- -Business Travelers
- -Convention Travelers
- —Female
- —Male
- —Affluent Over \$125K
- **—**\$80K \$125K
- —Under \$80K
- -City Travelers
- -Beach Travelers
- -Mountain Travelers
- -Dessert Travelers
- -Suburban area
- —Large city (urban area)
- -Rural area
- —Luxury Hotel
- -Non-Luxury Hotel
- -Peer-to-peer lodging
- -Campground or RV park

elers





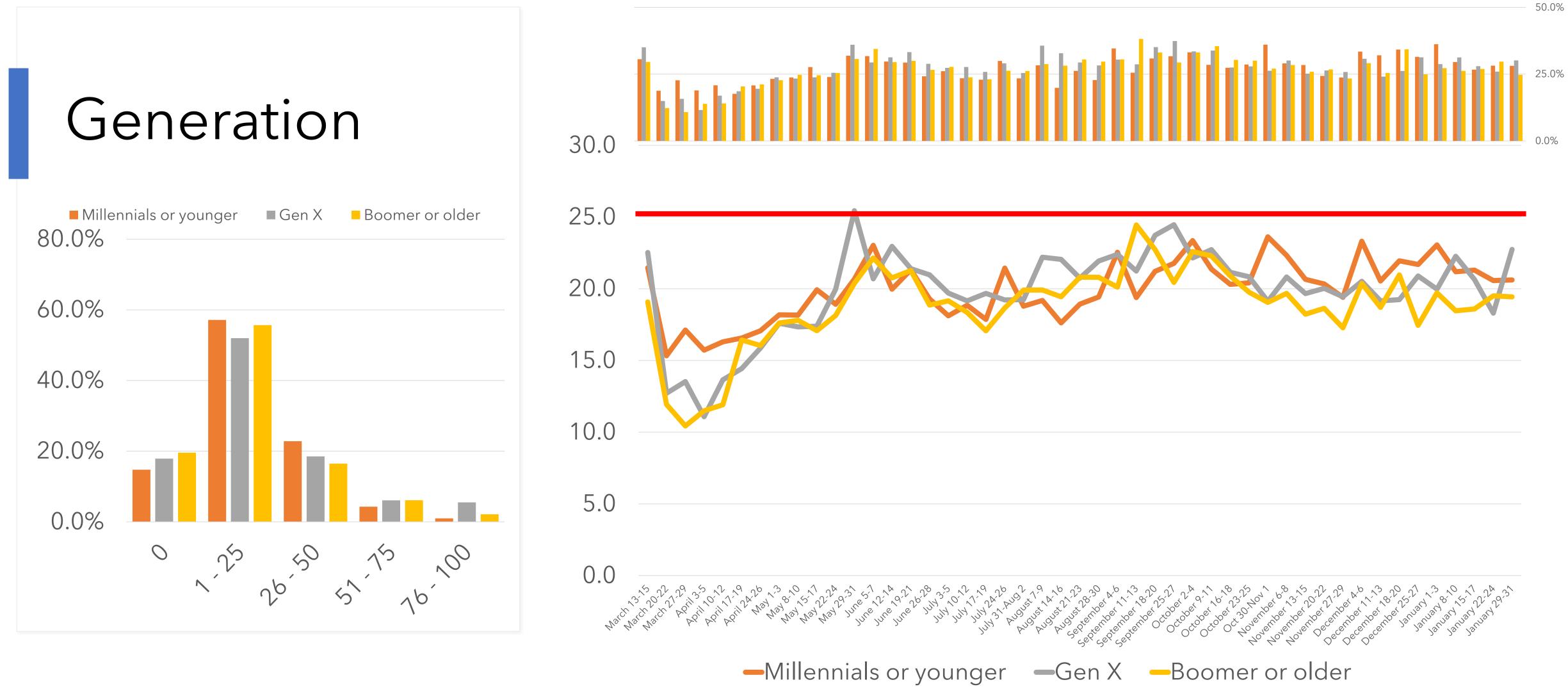










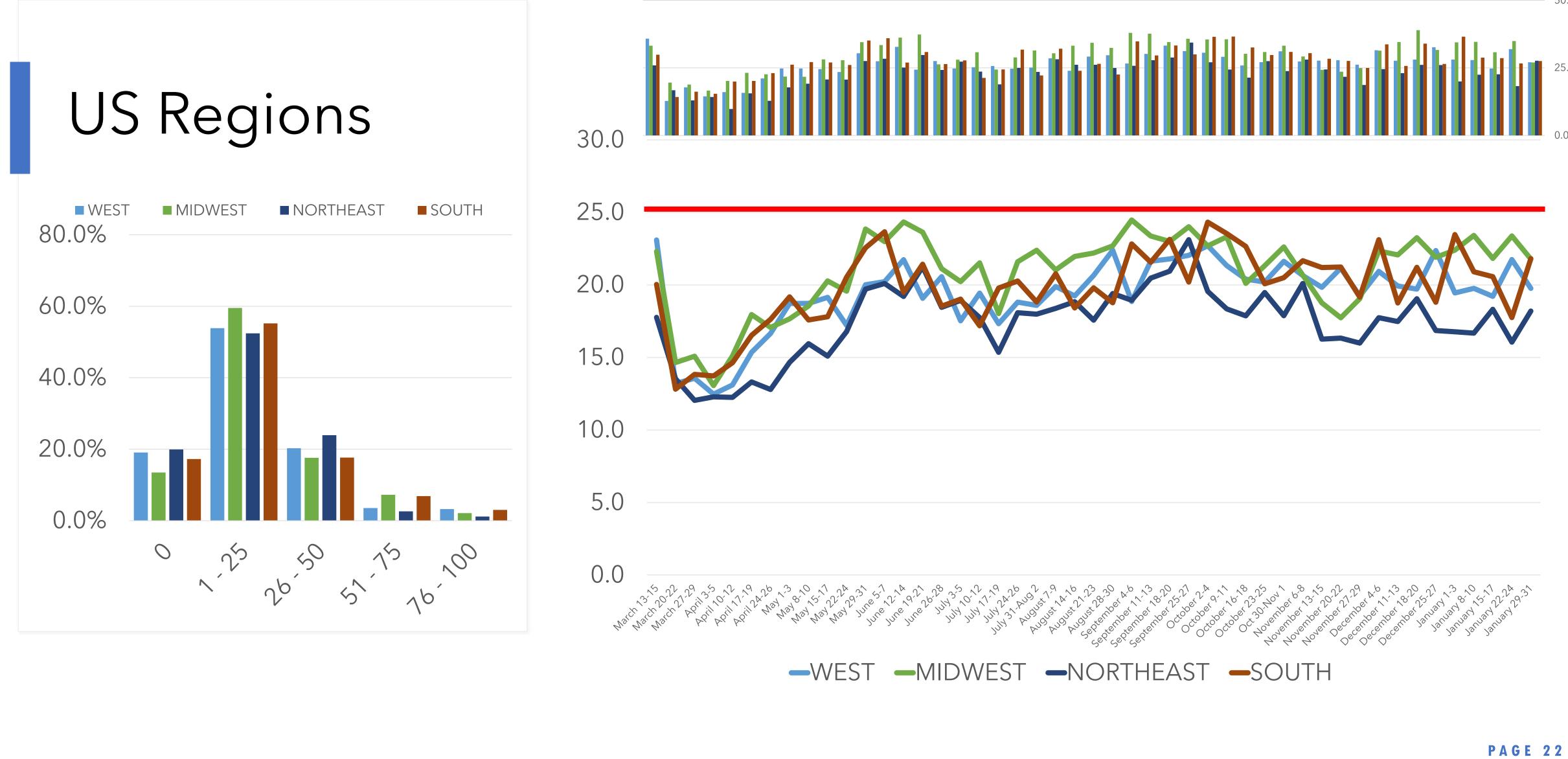










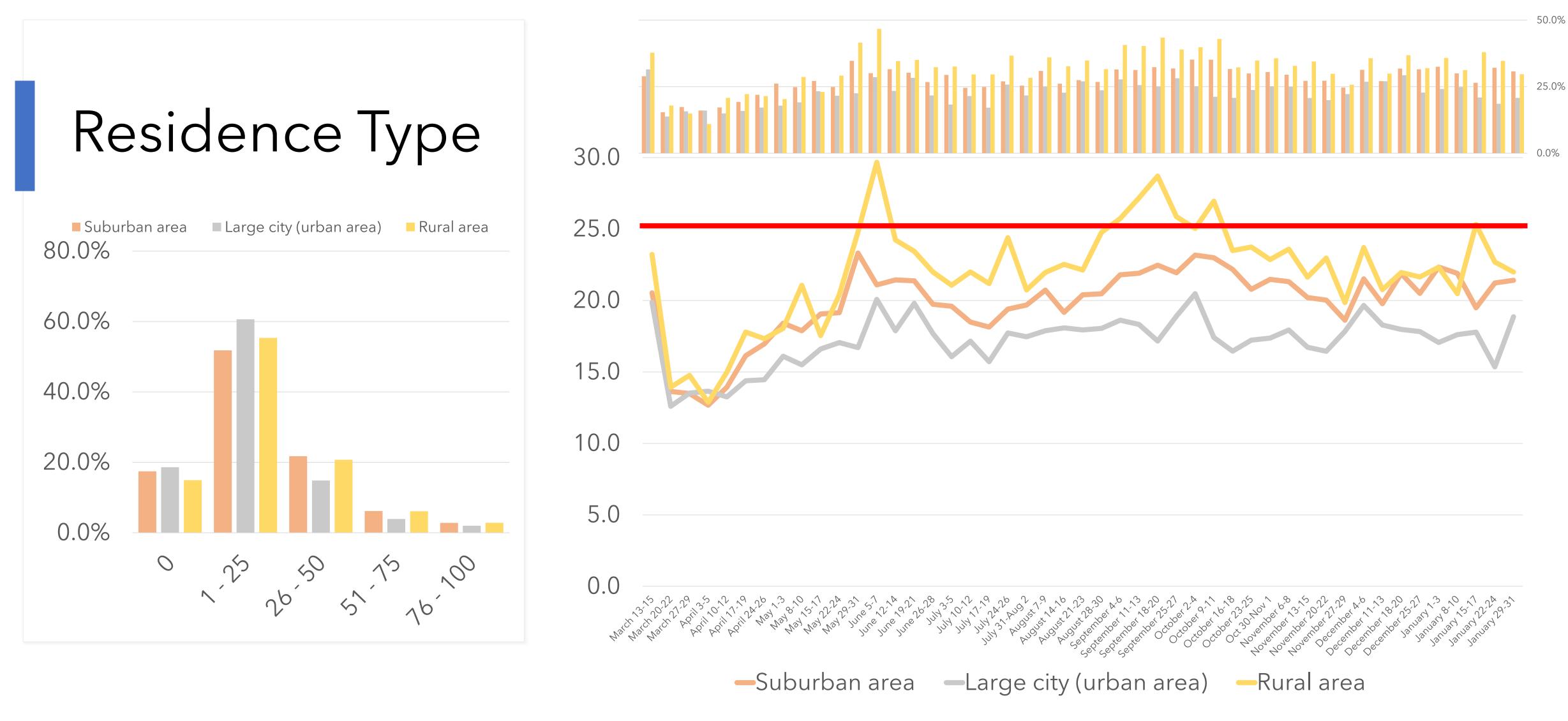


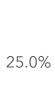


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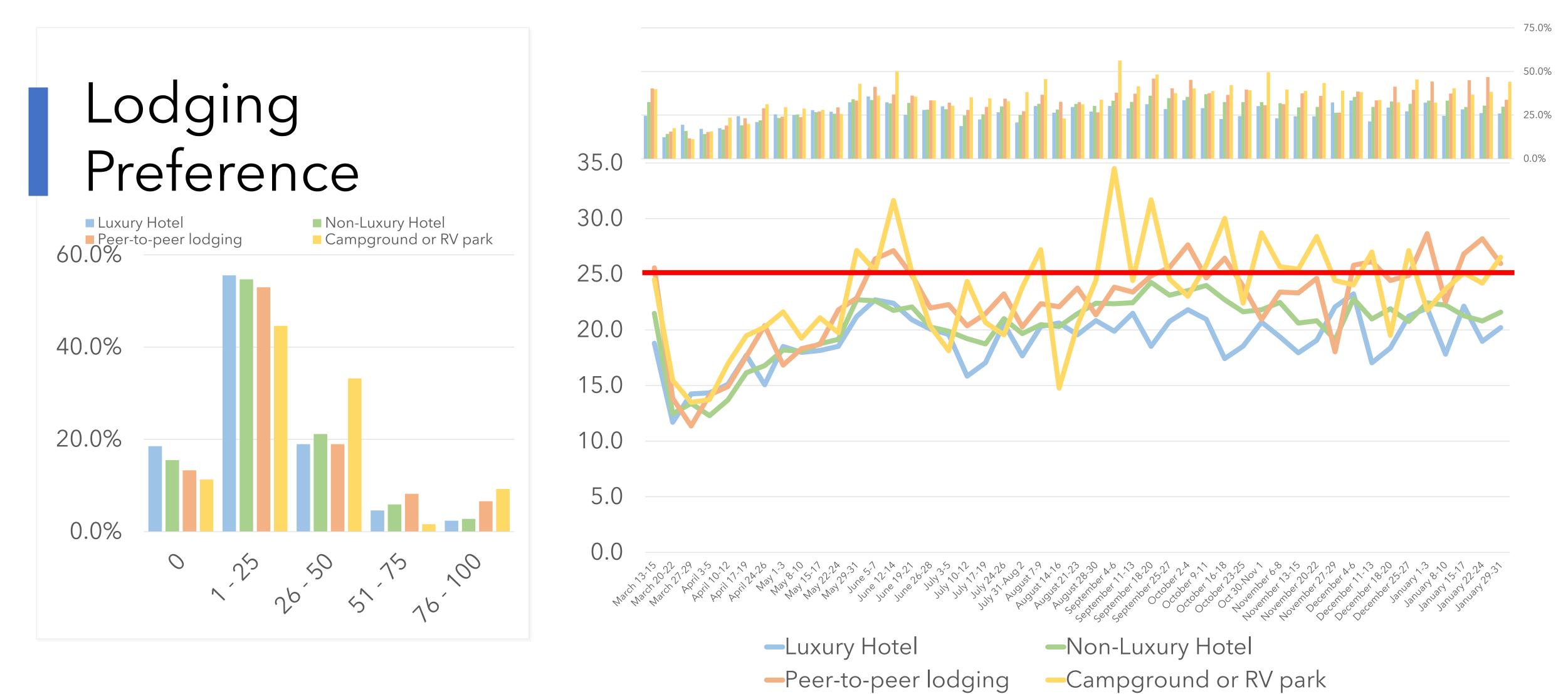


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## Questions? Need More Information?

• 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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# REGISTER NOW FOR OUR UPCOMING CORONAVIRUS TRAVEL SENTIMENT INDEX WEBINARS:

FEBRUARY 9, 2021 FEBRUARY 16, 2021 FEBRUARY 23, 2021 MARCH 2, 2021





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