CORONAWIRUS TRAWEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF FEBRUARY 8th, 2021

Destination Analysts

About Destination Analysts

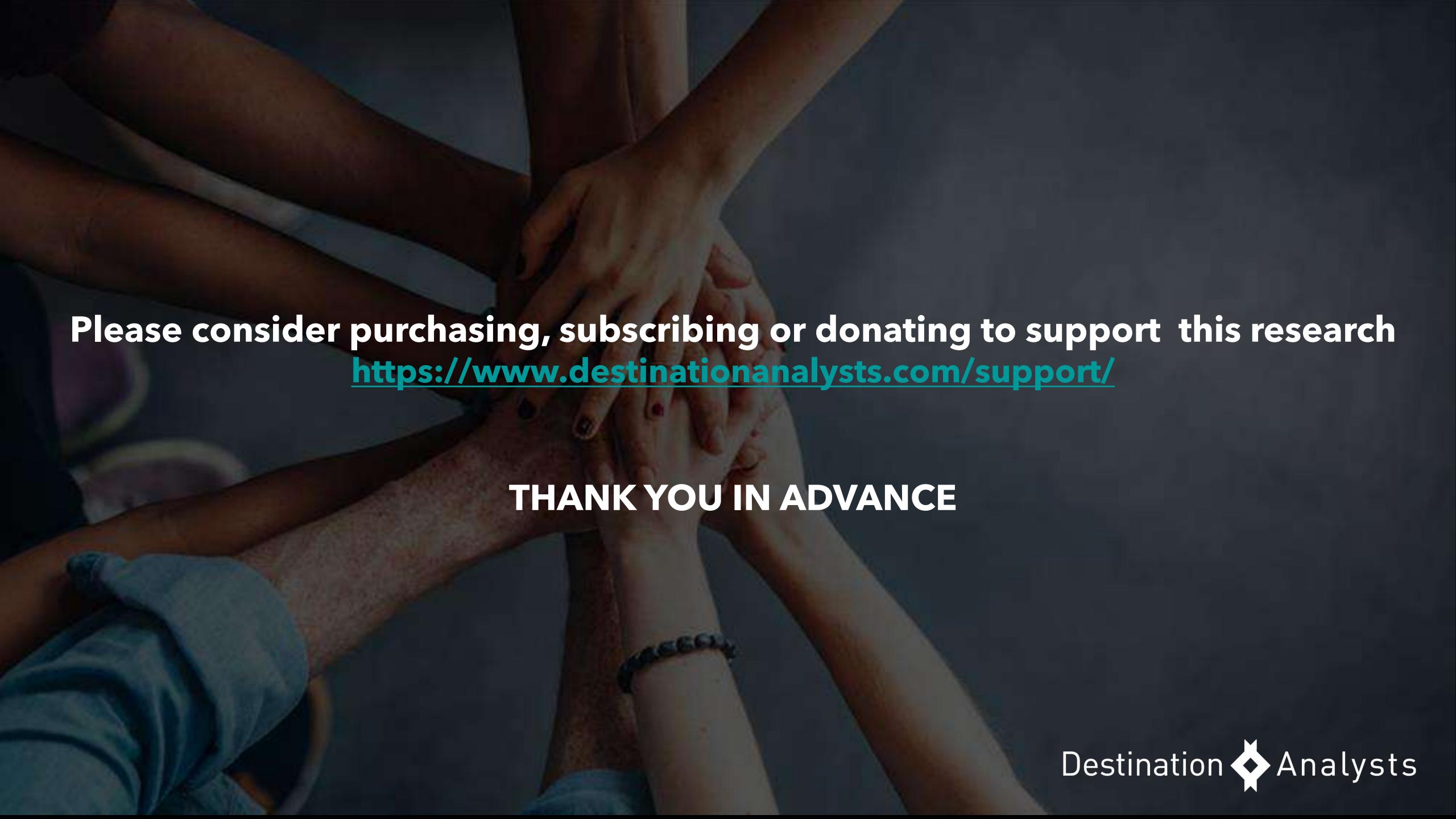
Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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.





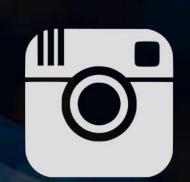
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Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

Following this week's travel insights update, we will be joined by a panel of restaurant industry professionals who will share how they're continuing momentum in the current environment, their perspective on how vaccine distribution will impact restaurants and dining, and indicators that signal recovery.

Sign up to attend the webinar on Tuesday, February 9th at 11:00am ET <u>here</u>.



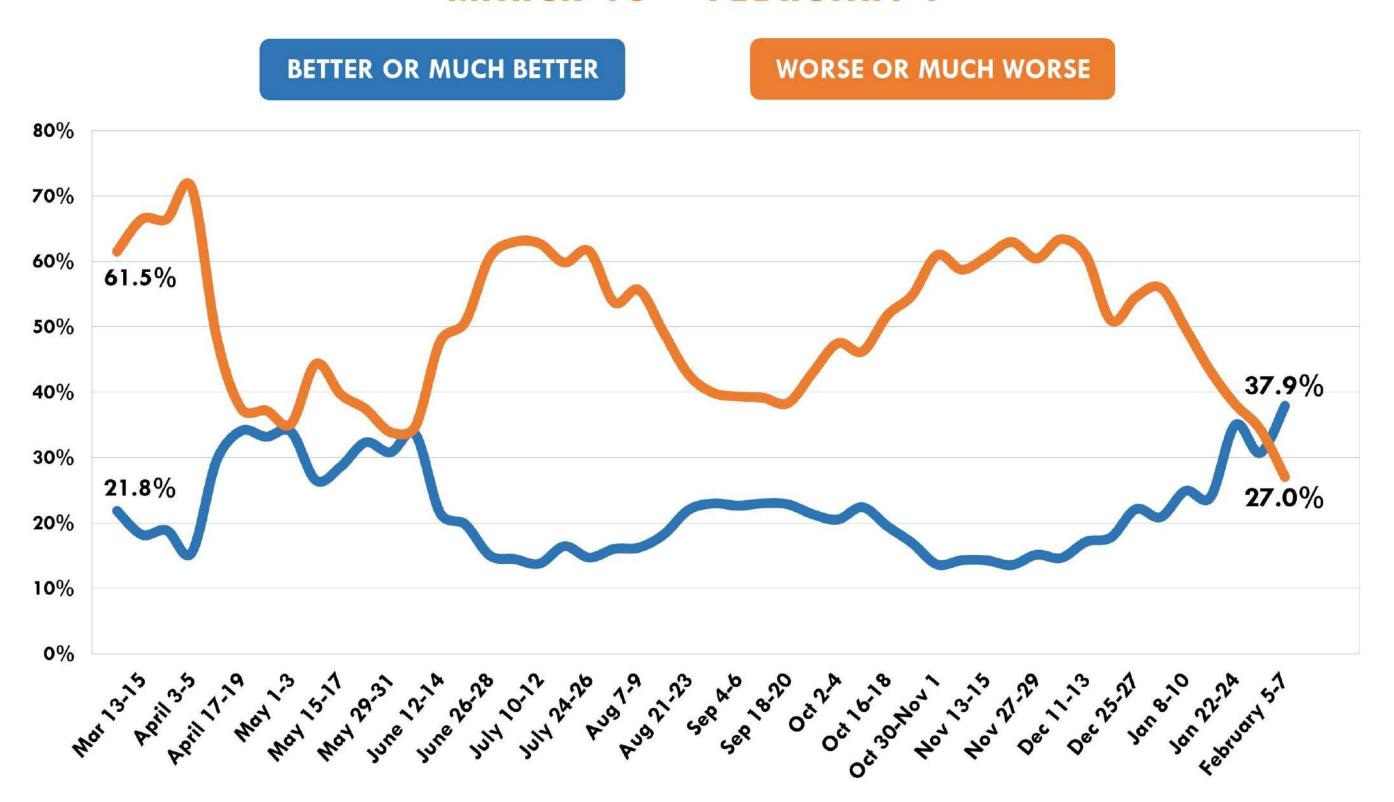


Expectations for the Coronavirus Situation in the Next Month

Although financial worries remain elevated, Americans' anxiety about contracting the coronavirus is down. For the first time ever, optimism about the course the pandemic will take in the United States over the next month significantly outweighs pessimism. This week, 37.9% of American travelers feel the situation will get better in the next month, while just 27.0% believe it will get worse—a record low.

EXPECTATIONS FOR THE CORONAVIRUS SITUATION IN THE U.S OVER THE NEXT MONTH

MARCH 13 - FEBRUARY 7



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 1-48. 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, 1,206, 1,205, 1,206, 1,205, 1,206, 1,206, 1,206, 1,206, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209 and 1,209 completed surveys.)



Mental Well-Being of American Travelers

Staying safe from infection remains a top priority for

Americans as they consider their lifestyle over the next 6

months, although close behind are finding joy and

happiness, emotional well-being and relaxation. Compared

to the early period of the pandemic last Spring, more

Americans say they will prioritize having new experiences,

as well. These lifestyle priorities may be in response to

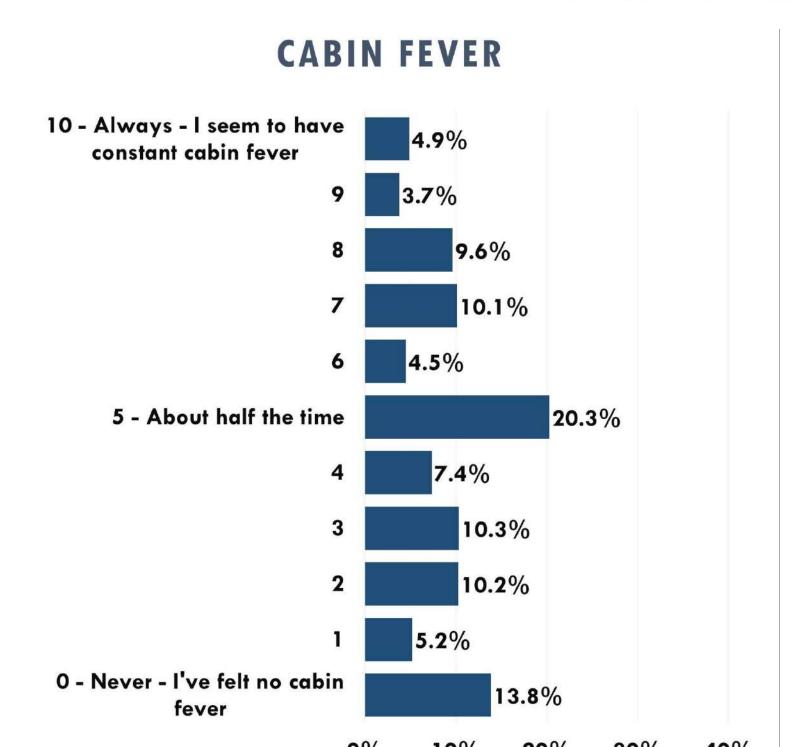
negative aspects weighing on mental wellness during this

ongoing pandemic.

American travelers rate their daily stress levels at 5.6 on a 10-point scale on average, meaning more than moderate, occasional stress. Younger Americans continue to feel far more daily stress than older Americans. Nearly half of Americans (48.4%) report feeling symptoms of burn out at least half the time in the last month, and an even greater number--53.1%--say they have as frequently felt cabin fever.

FREQUENCY OF CABIN FEVER & BURNOUT IN THE PAST MONTH

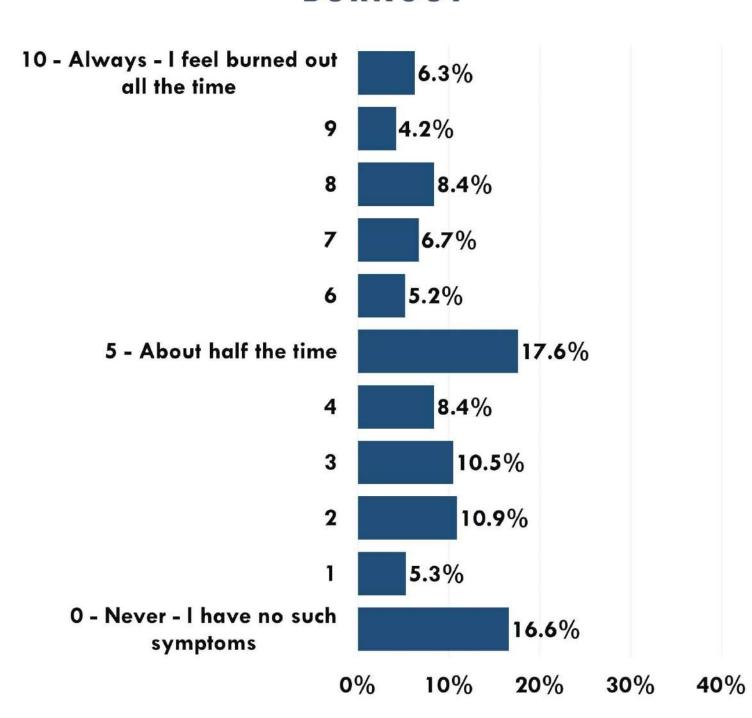
AS OF FEBRUARY 7, 2021



Question: Thinking about the last month, (Using a 11-point scale) please tell us how often you have felt "cabin fever" (i.e., irritability and restlessness from living in isolation or a confined area for a prolonged time).

(Base: Wave 48 data. All respondents, 1,209 completed surveys. Data collected February 5-7, 2021)

BURNOUT



Question: Thinking about the last month, (Using a 11-point scale) please tell us how often you have felt symptoms of being "burned out" (i.e., a state of emotional, mental, and often physical exhaustion brought on by prolonged or repeated stress).

(Base: Wave 48 data. All respondents, 1,209 completed surveys. Data collected February 5-7, 2021)



Openness to Travel Inspiration

Although the state of American's mental health may be less than ideal, travel can serve as salve.

American travelers' primary motivations for taking their next trip are far and away to relax and escape stress (45.7%) and spend time with family (43.2%). Americans continue to perceive the safety of travel and leisure activities as safer than at any other period of the pandemic, and travel guilt is slowly declining (48.6%). Nearly three-in-ten (28.2%) have observed more travel among their personal networks lately. In terms of their state-of-mind around travel, 56.8% are feeling readiness versus hesitation. The average level of excitement about travel in 2021 is even slightly greater than at the start of the year (5.9 vs 5.8). Very importantly, Americans remain in a state of openness to travel inspiration that is greater than any other period in the last 11 months (6.0/10).

OPENNESS TO TRAVEL INSPIRATION

MARCH 13, 2020 - FEBRUARY 7, 2021



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 1-48. 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, 1,204, 1,203, 1,203, 1,203, 1,205, 1,205, 1,205, 1,205, 1,204, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209 and 1,209 completed surveys.)



Recall of Recent Travel Advertising

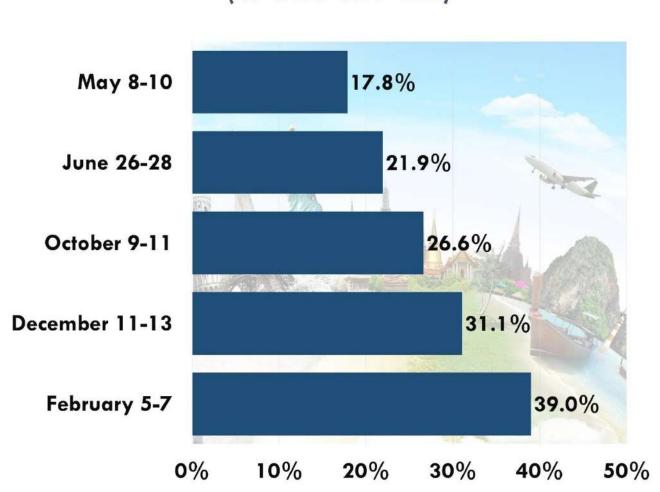
Advertising may play a role in this excitement and openness Americans are feeling.

In total, 39.0% of American travelers say they saw one or more ads for travel destinations in the past month, up from 31.1% in December and 17.8% last May. This rate is similar across the entire U.S., although younger travelers are likelier to recall such destination advertising. In terms of other types of travel advertising, one-in-five American travelers recall seeing a hotel or resort ad in the last month, and a similar proportion recall seeing an airline ad. Americans continue to be increasingly comfortable with advertisements of their own communities for tourism. This week 40.9% said they would be happy if they saw an ad promoting their home city or town as a place for people to visit when safe.

RECALL OF RECENT TRAVEL ADVERTISING

AS OF FEBRUARY 7, 2021

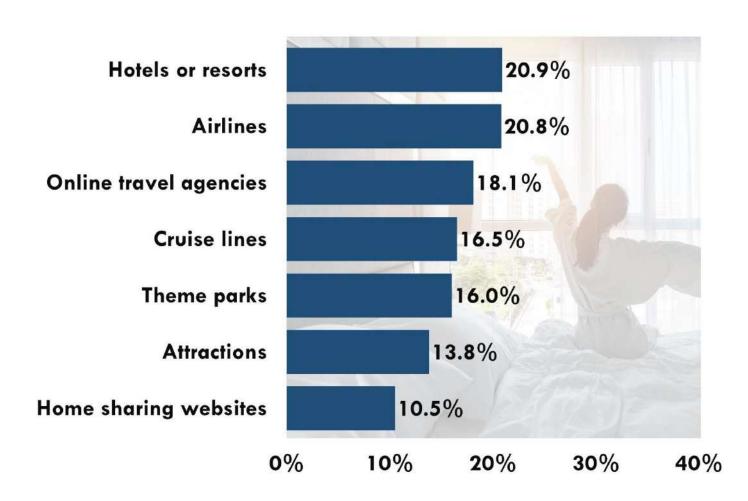
RECALL OF DESTINATION ADVERTISING (% WHO SAY YES)



Question: Do you recall seeing any specific advertisements for any travel destinations in the past month?

(Base: Waves 9, 16, 31 40 and 48. All respondents, 1,181, 1,231, 1,192, 1,206 and 1,209 completed surveys.)

RECALL OF OTHER TRAVEL ADVERTISING



Question: Which (if any) of these types of travel advertisements do you recall seeing in the past month?

(Base: Wave 48 data. All respondents, 1,209 completed surveys. Data collected February 5-7, 2021)



The Impact of COVID-19 Vaccines on American Travel

The imperative role of COVID-19 vaccines in travel industry recovery continues to be reiterated.

Emphasizing the relationship between vaccination rollout and travel volume, over half (53.0%) of American travelers agree they will avoid travel until vaccines are made available. In addition, over a third (36.1%) of parents with school-age children say they will skip the family vacation this summer if their kids are not vaccinated. Nevertheless, the availability of the vaccines continue to be a source of hope--62.5% say they make them more optimistic about life resuming to normalcy in the next 6 months and 56.3% say they make them more optimistic that they can travel safely in the same period. In addition, over a third of American travelers report they have begun planning and/or booking future travel specifically in anticipation of a wide distribution of COVID-19 vaccines.

THE IMPACT OF COVID-19 VACCINES ON AMERICAN TRAVEL

53.0%

Agree they will avoid travel until vaccines are made widely available

35.9%

Have begun planning and/or booking future travel in anticipation of wide distribution of COVID-19 vaccines

36.1%

Of those with school-age children will not take a family vacation this summer if their kids are not vaccinated

62.5%

Say the available COVID-19 vaccines make them more optimistic about <u>life returning</u> to normal in the next 6 months

Say the available COVID-19
vaccines make them
more optimistic about
their ability to travel safely
in the next 6 months

56.3%

(Base: Wave 48 data. All respondents, 1,209 completed surveys. Data collected February 5-7, 2021)



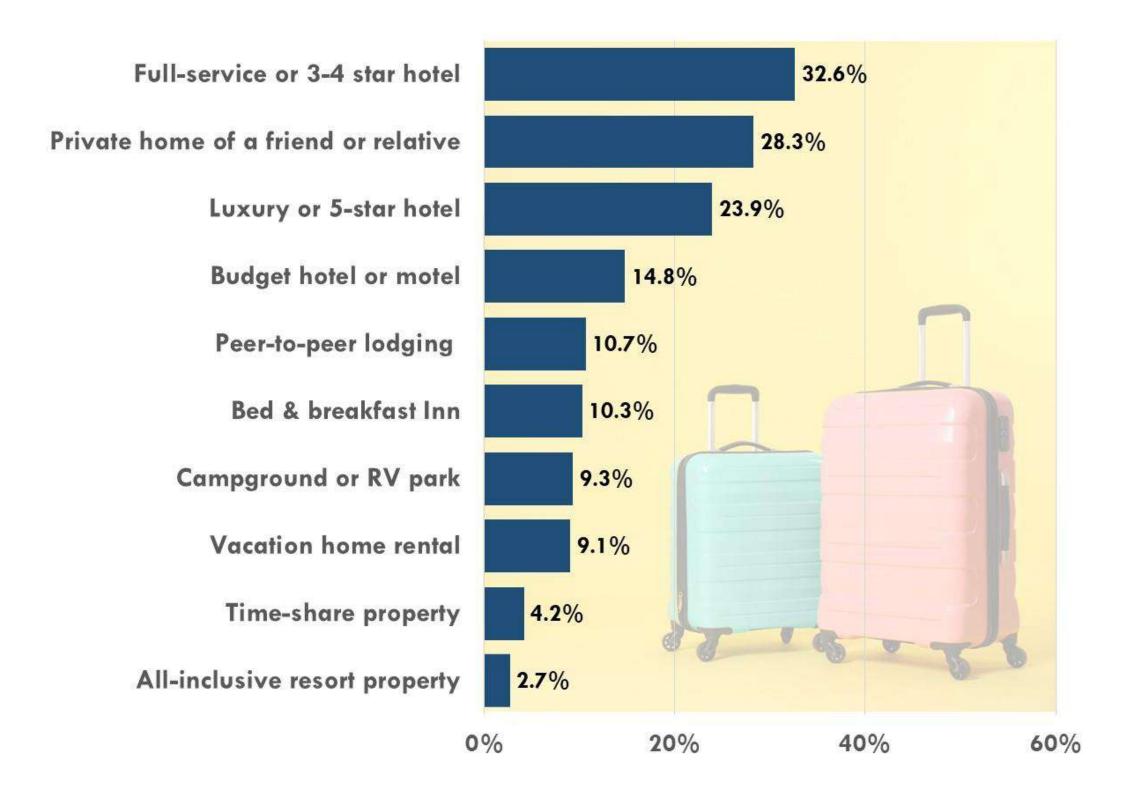
Expected Place(s) of Stay on Trips Taken in the Next Three Months

As of this week, 81.2% of American travelers report they have at least tentative trip plans right now, and 60% have taken some action in the planning tasks for their next trip, including researching destinations to visit (26.4%), researching their lodging options (17.1%) and researching travel activities (14.7%).

About half of Americans anticipate taking at least one leisure trip within the next 3 months. In looking at the accommodations they expect to stay in on these upcoming trips, hotels are most common. Nearly one third plan to stay in a full-service 3 or 4-star hotel, while just under a quarter plan to stay in a 5-star luxury hotel.

EXPECTED PLACE(S) OF STAY ON TRIPS TAKEN IN THE NEXT THREE MONTHS

AS OF FEBRUARY 7, 2021



Question: On these leisure trips, in which of the are you expecting to stay overnight?

(Base: Wave 48 data. Respondents expecting to travel in the next three months, 602 completed surveys. Data collected February 5-7, 2021)



Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing Highlights from the Week of February 8th



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.

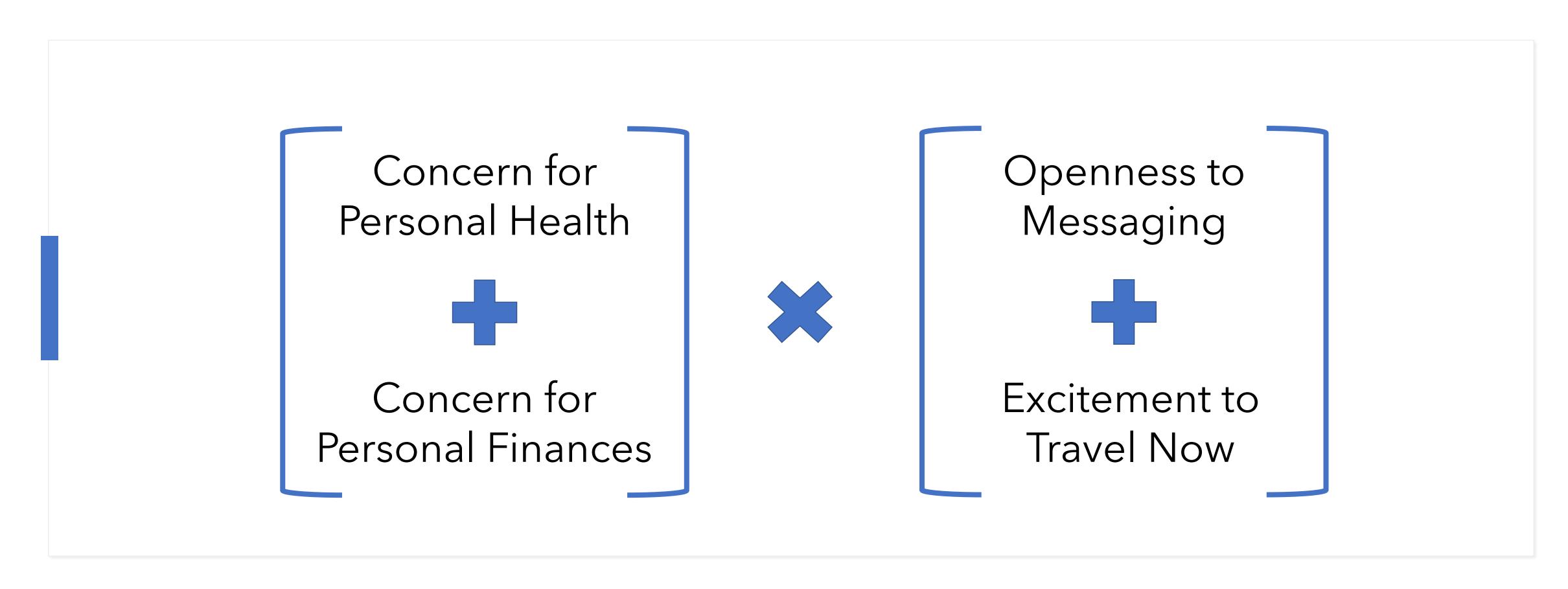


The goals are to identify:

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



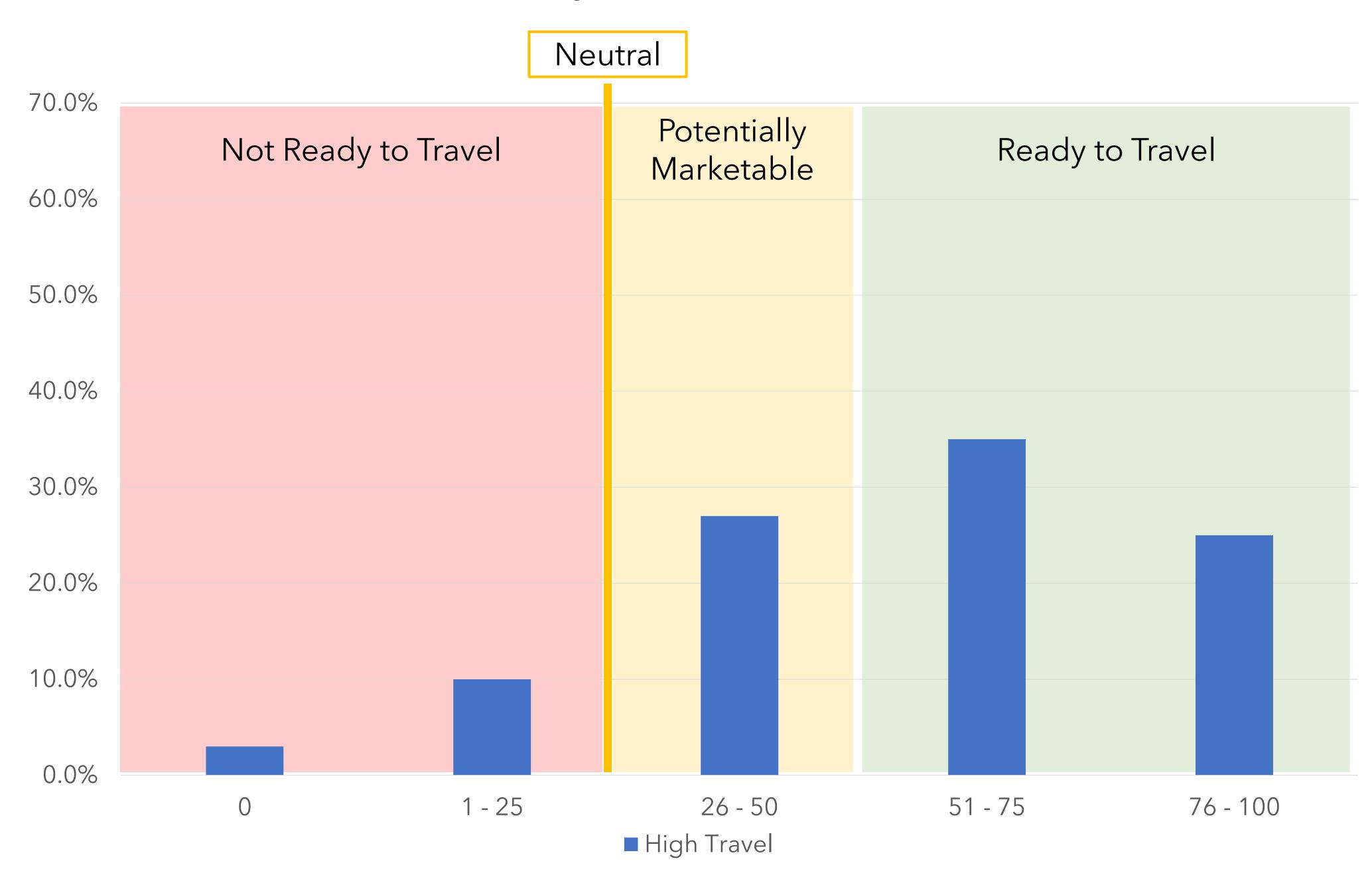
Predictive Index Formula



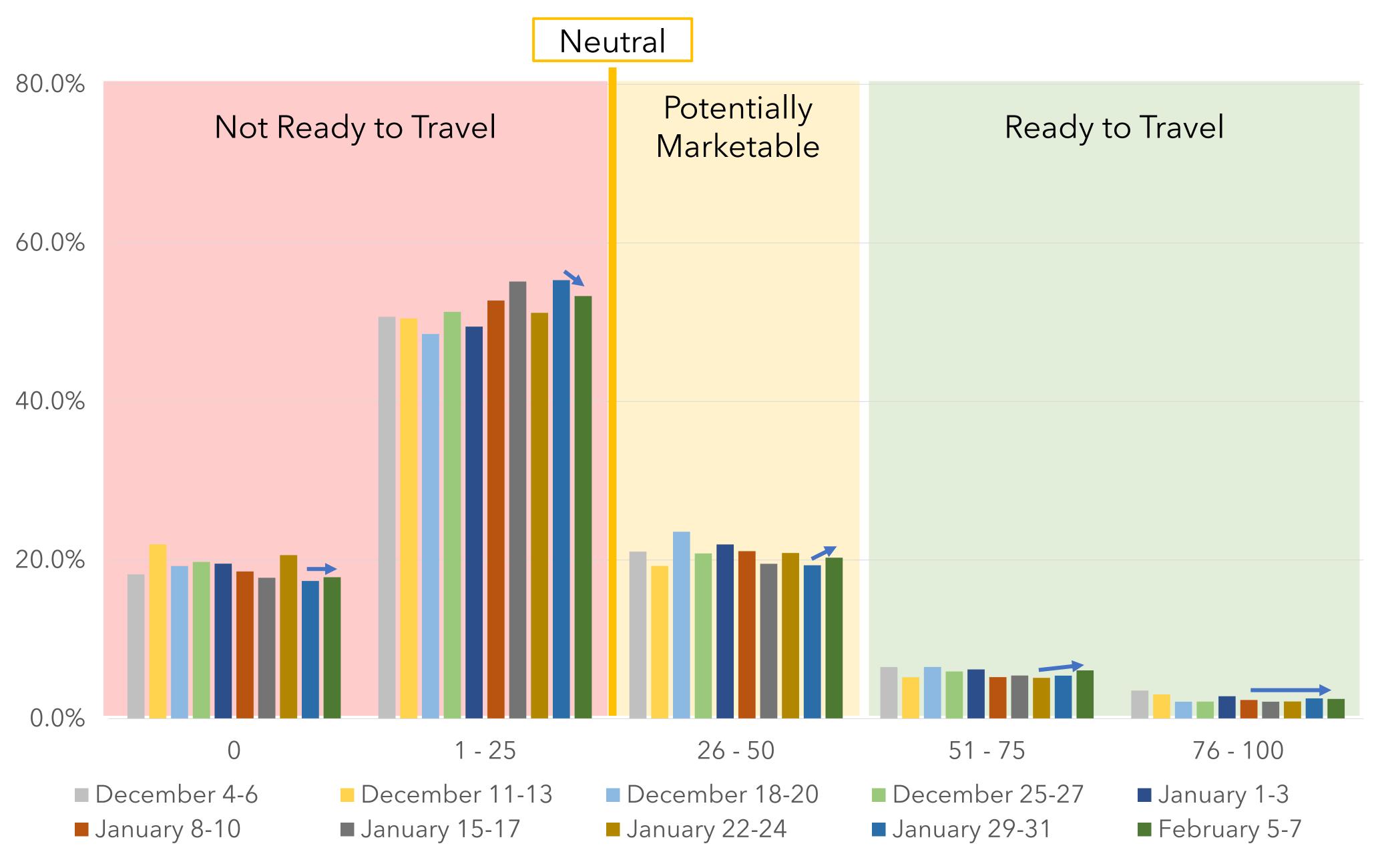
*Normalized to a 100pt scale

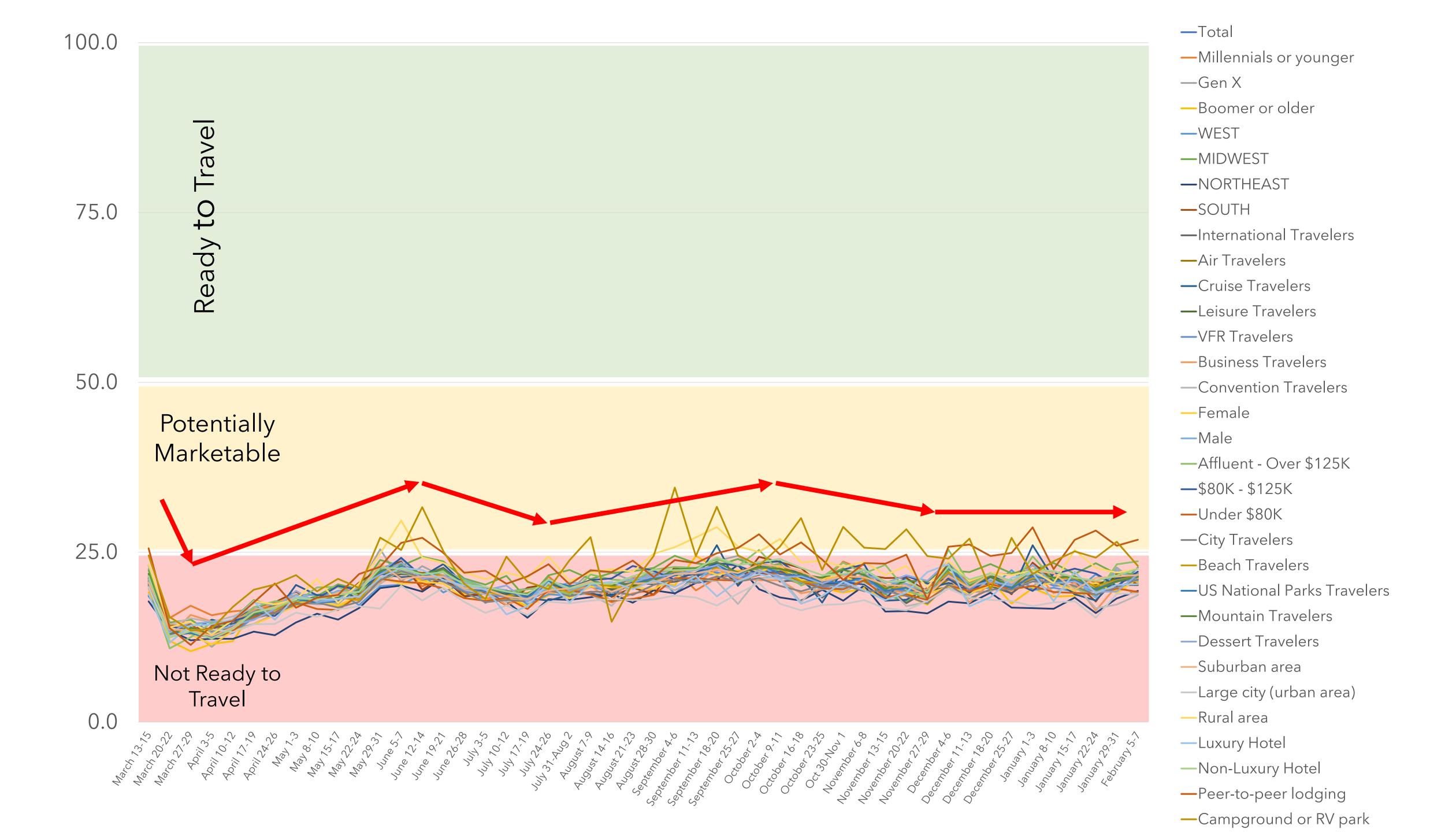


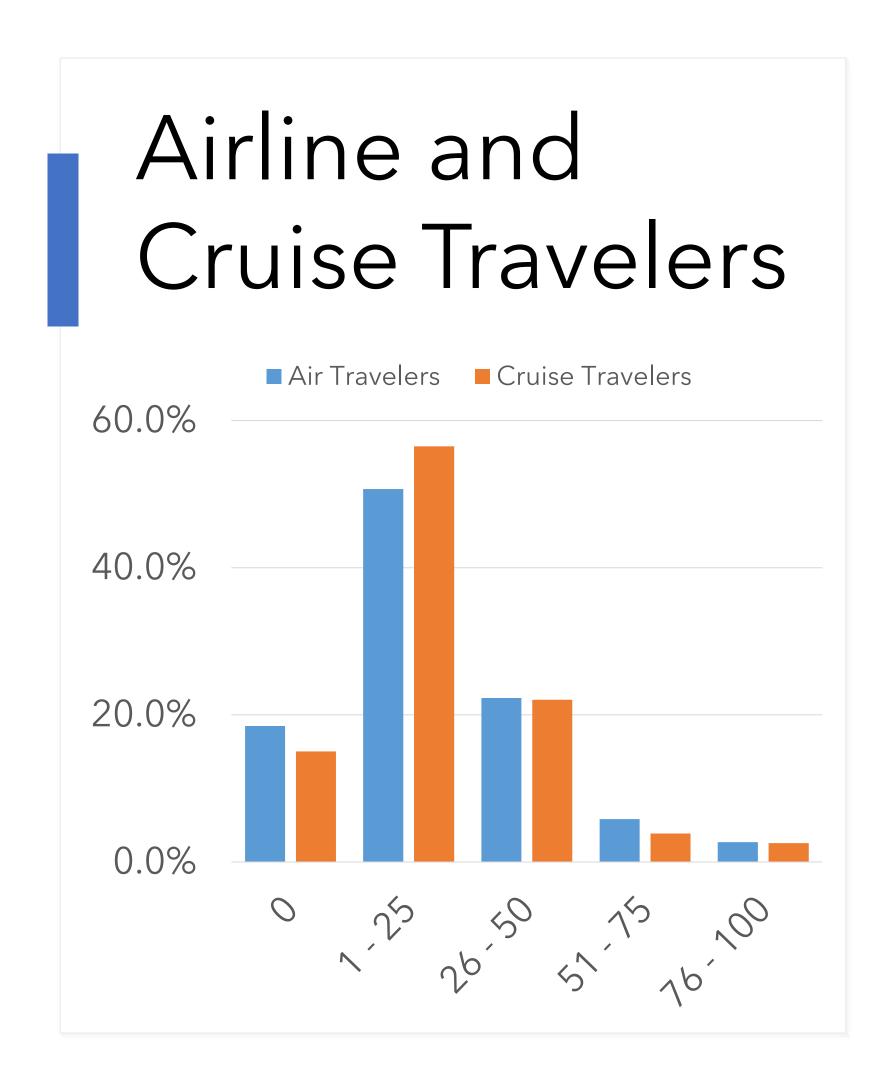
Healthy Travel Outlook

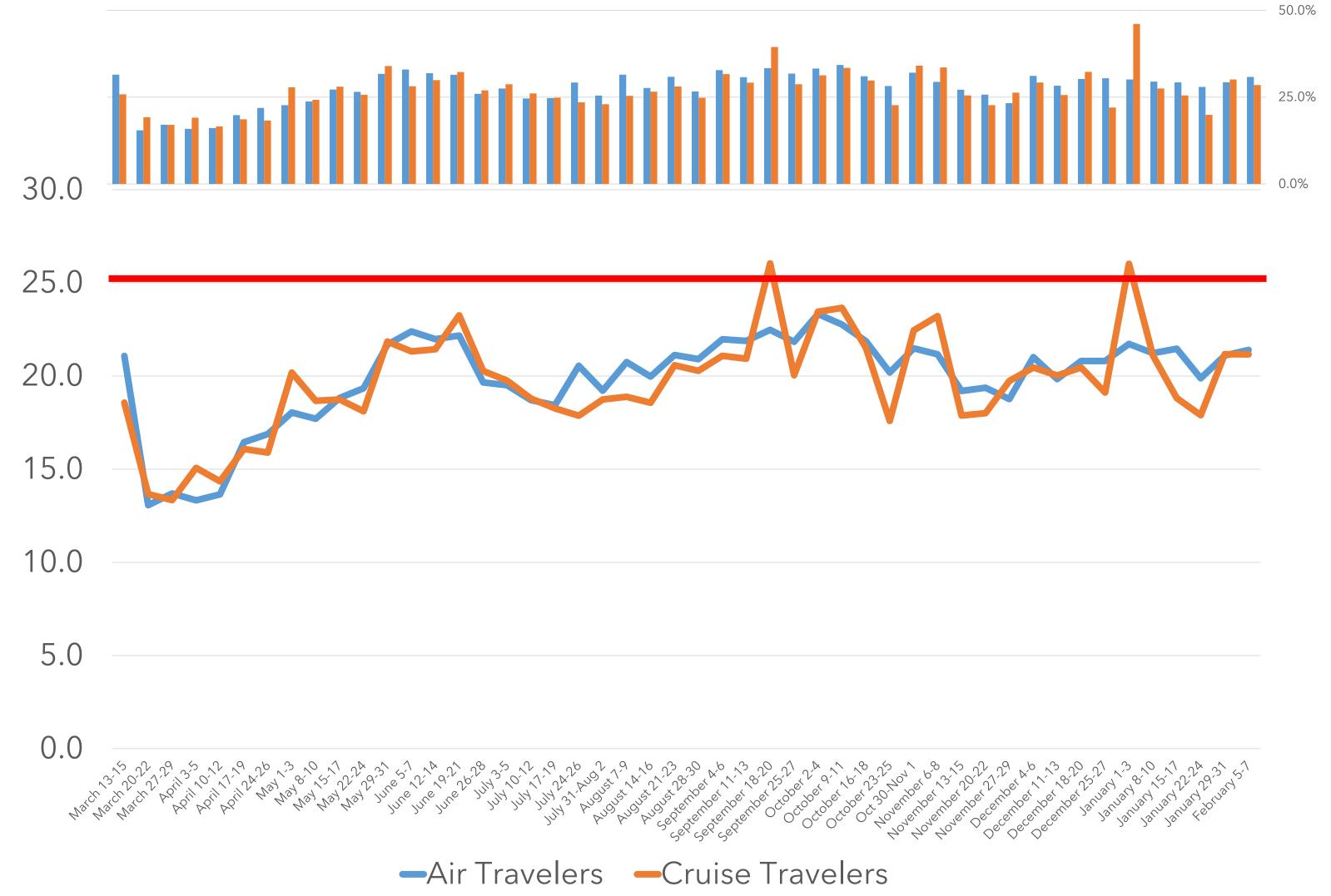


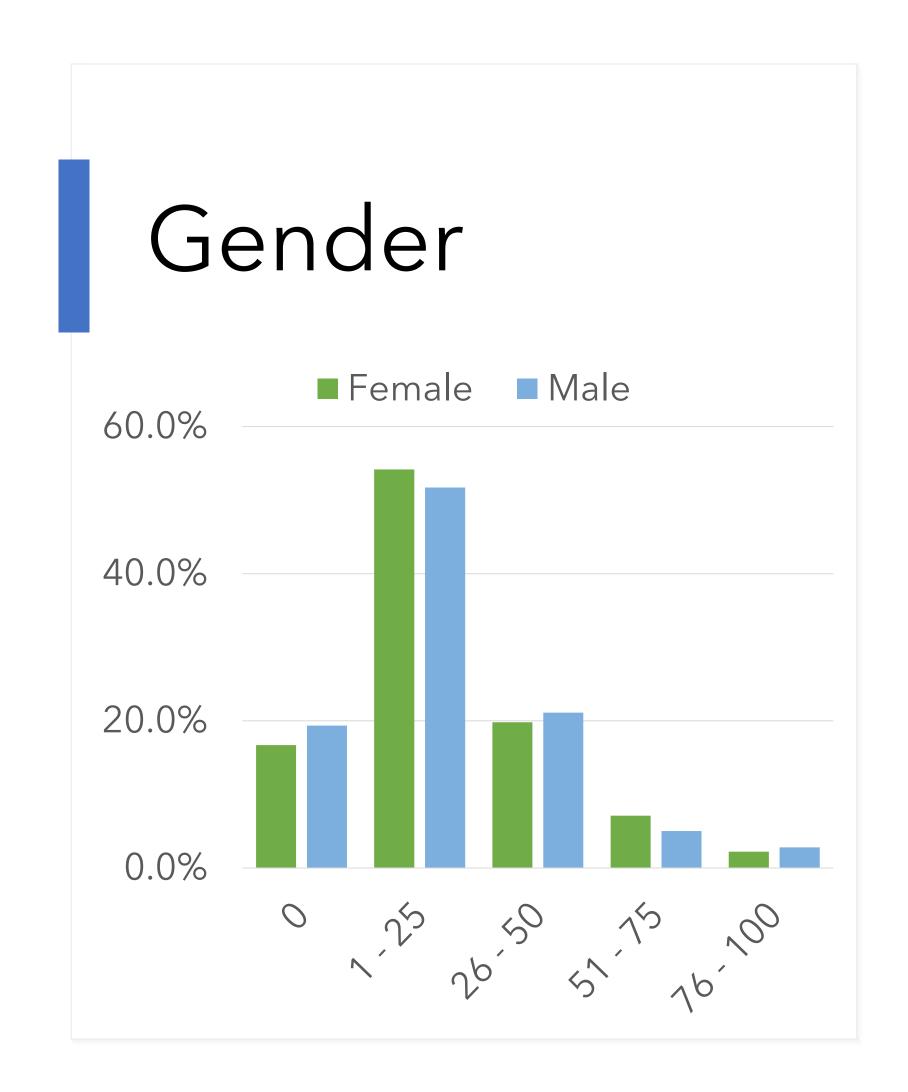
Travel Outlook

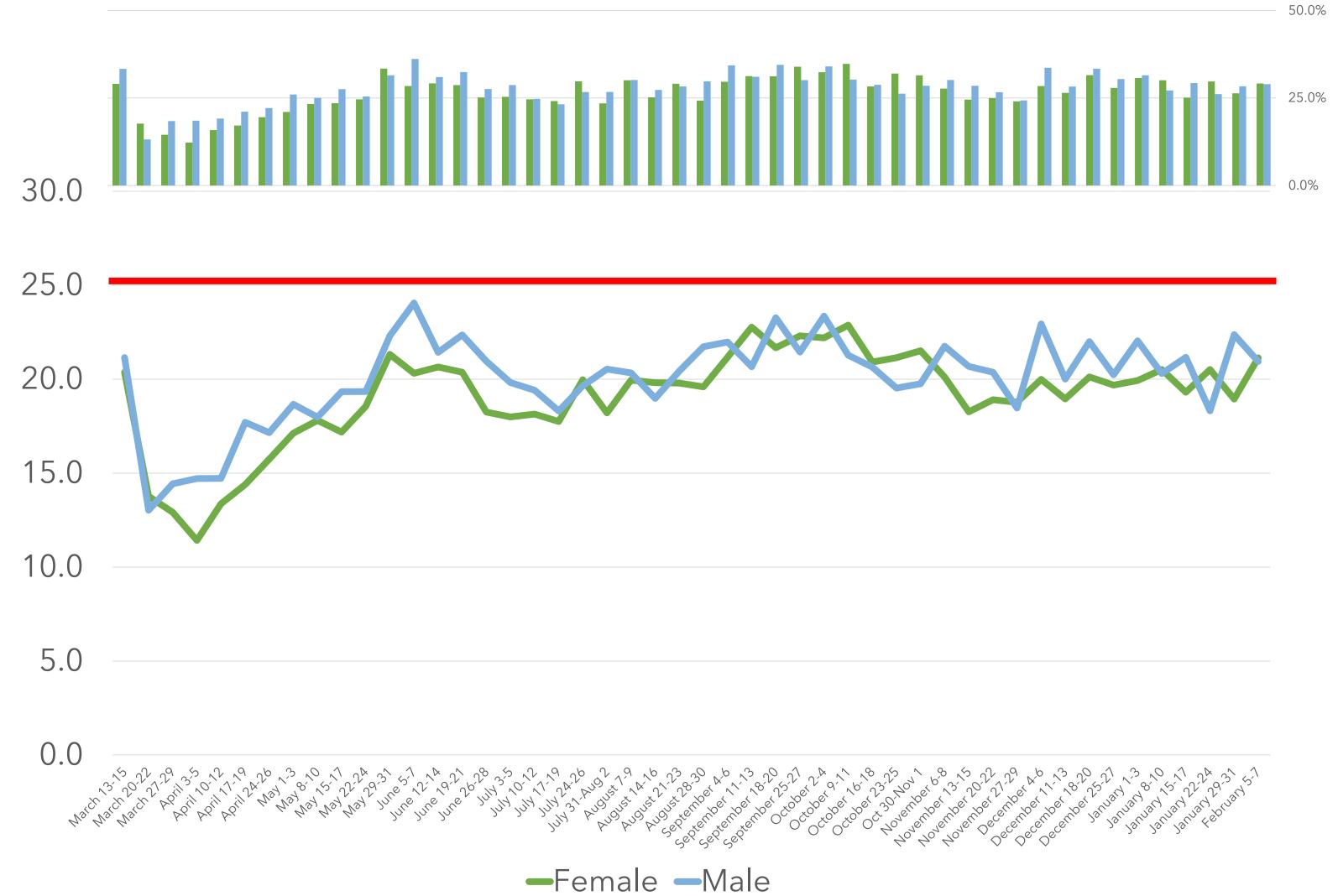


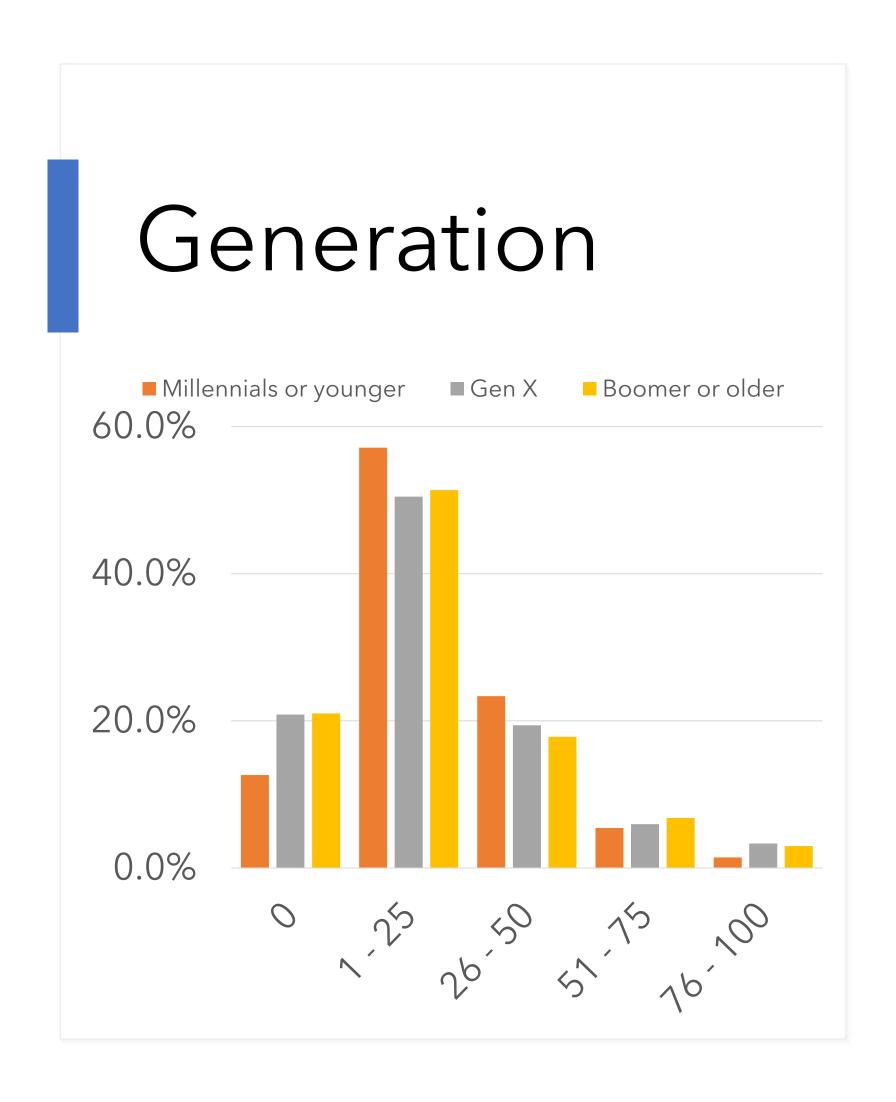


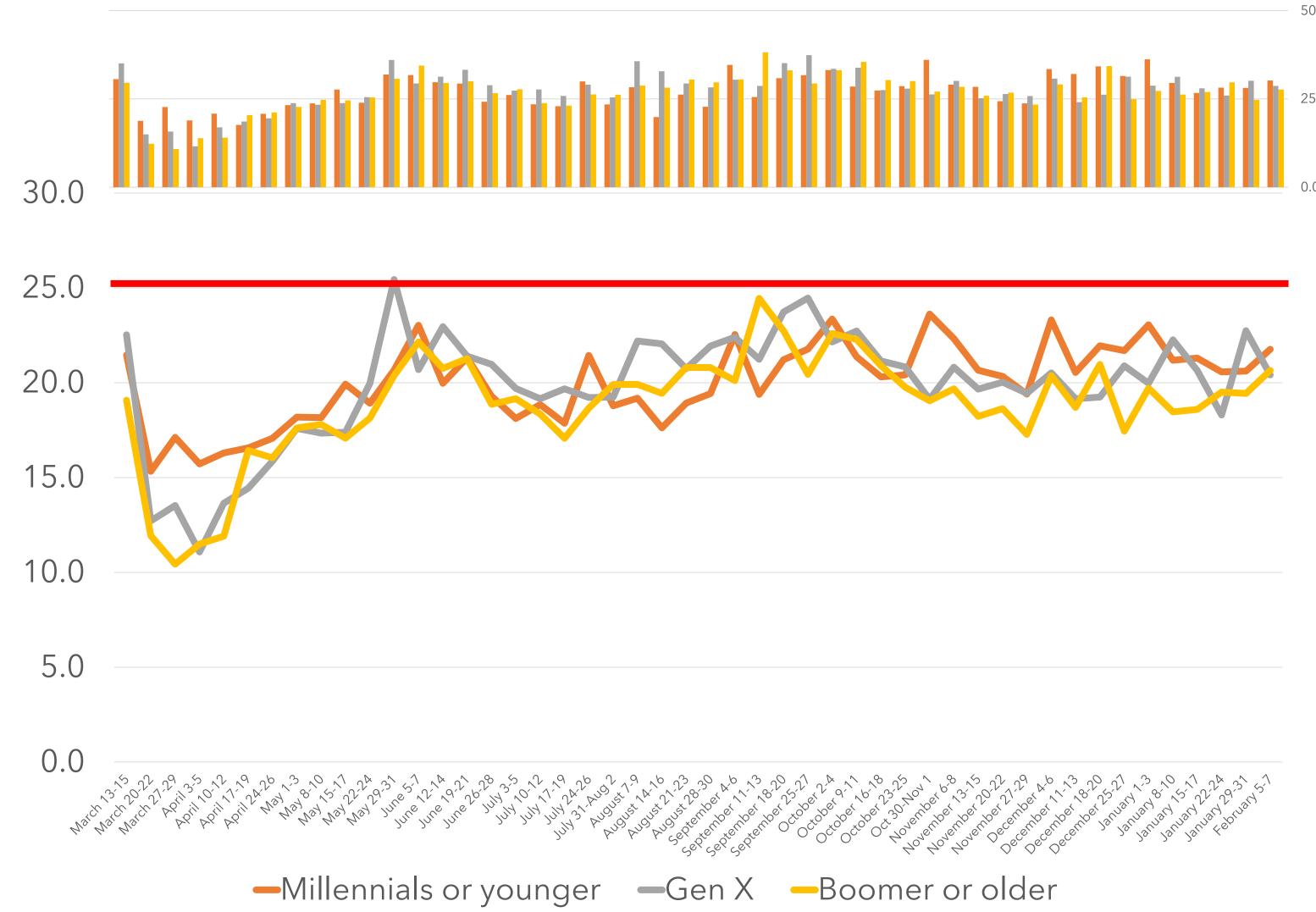


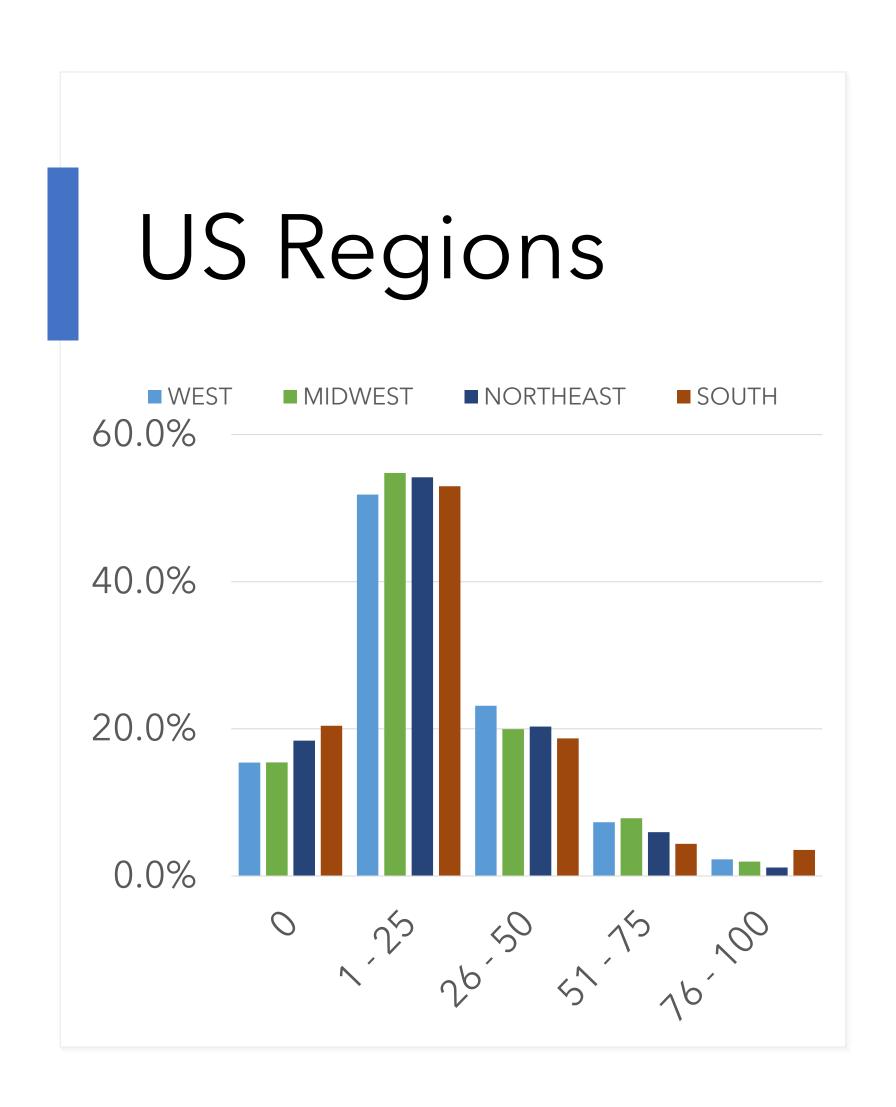


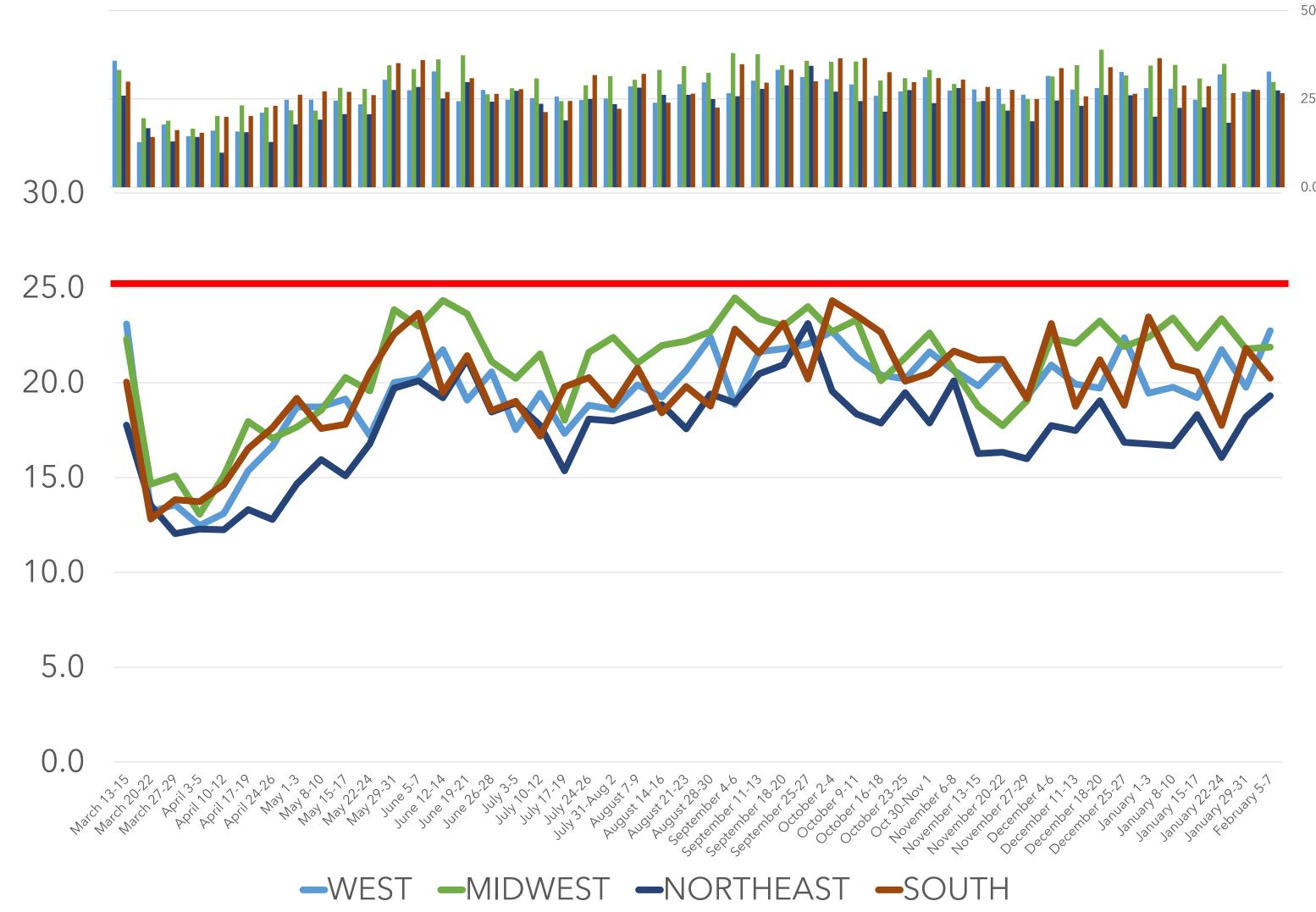


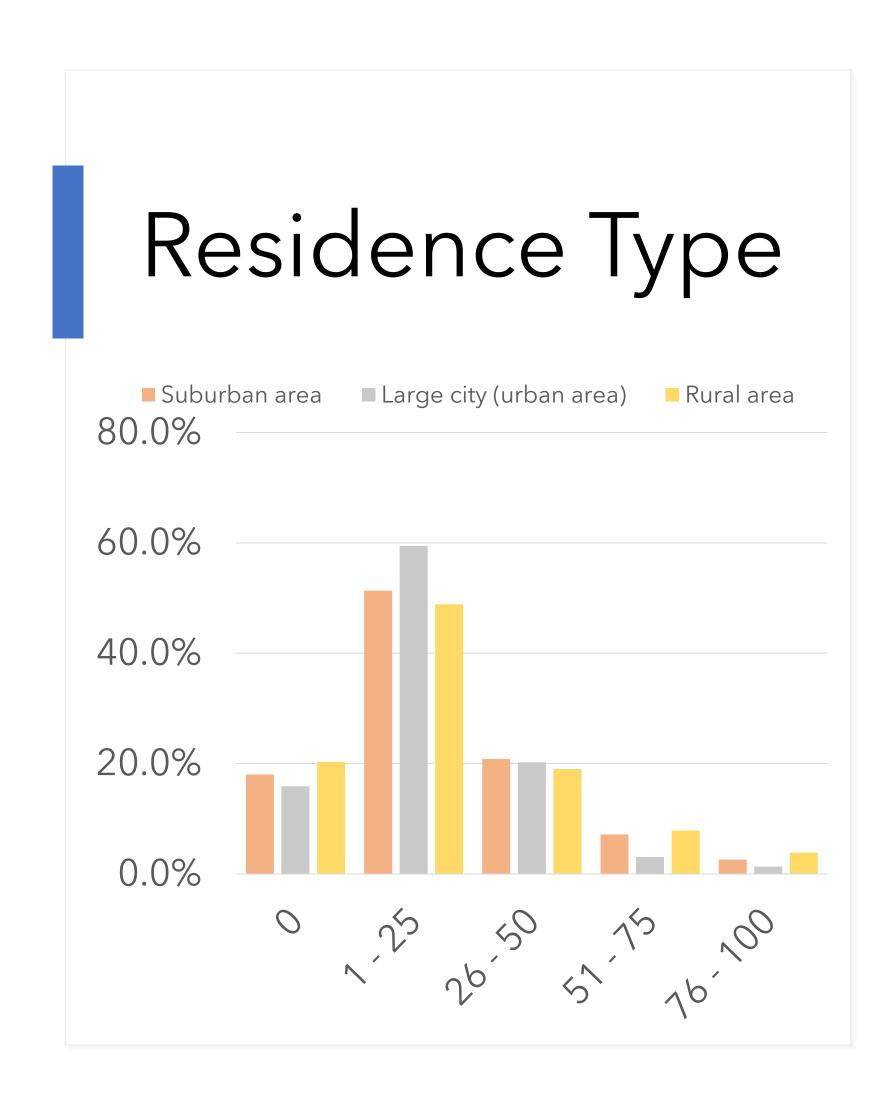


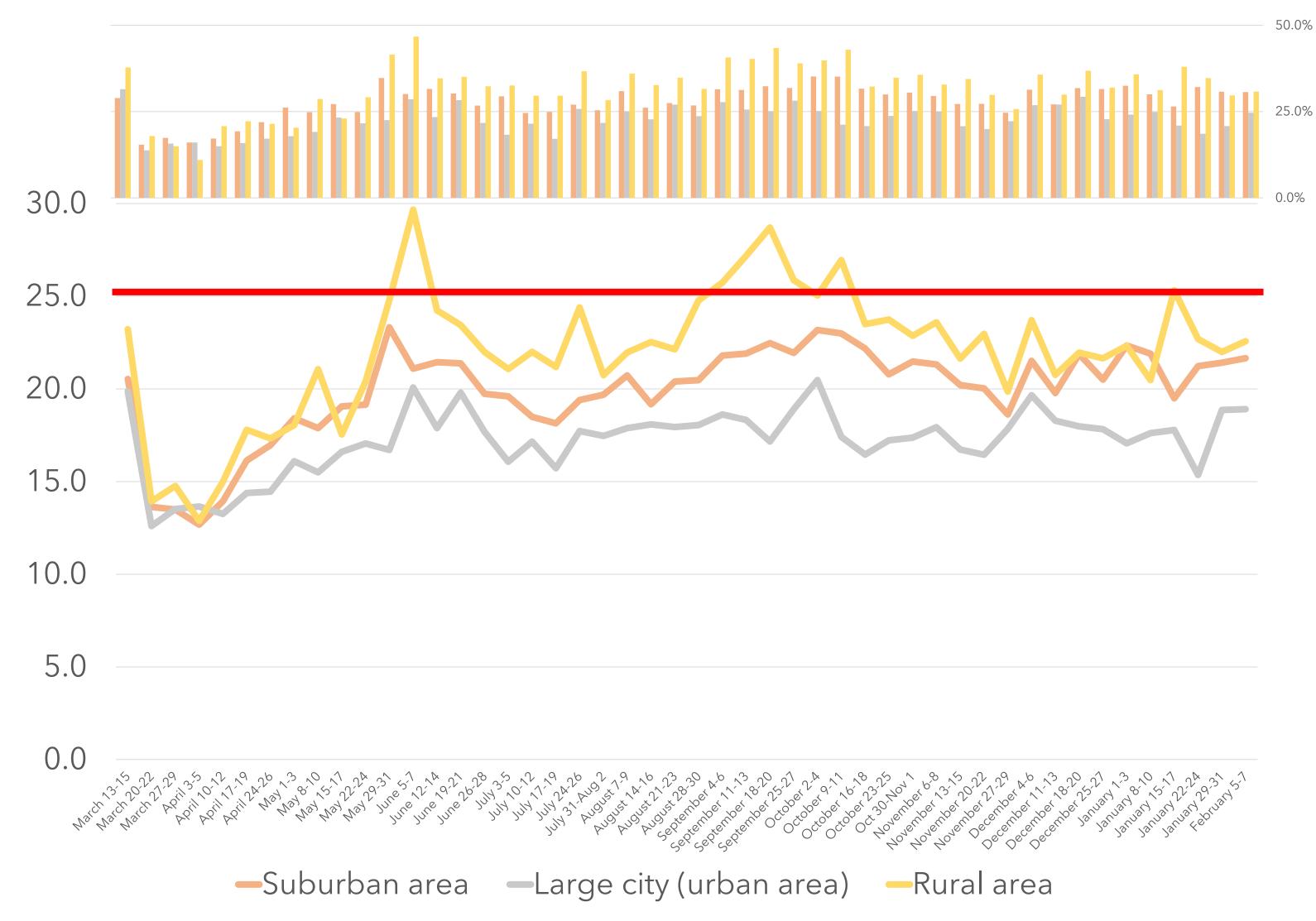


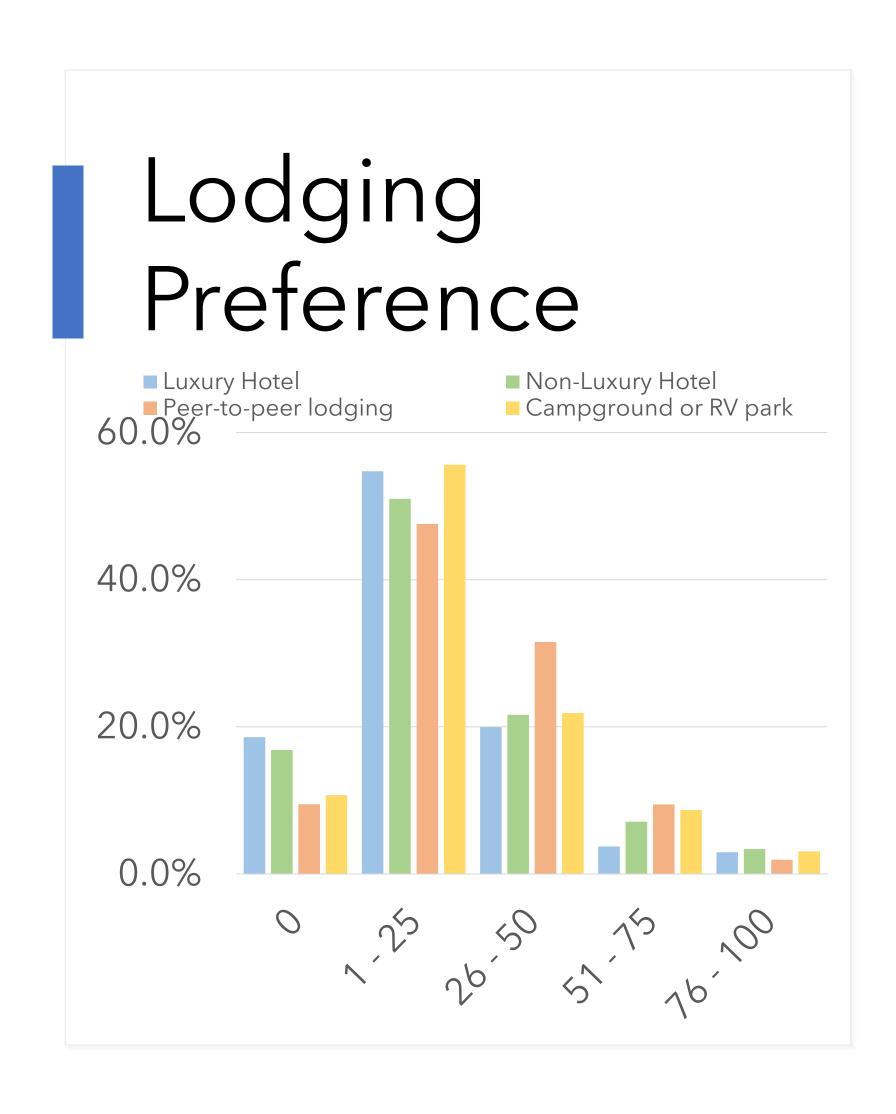


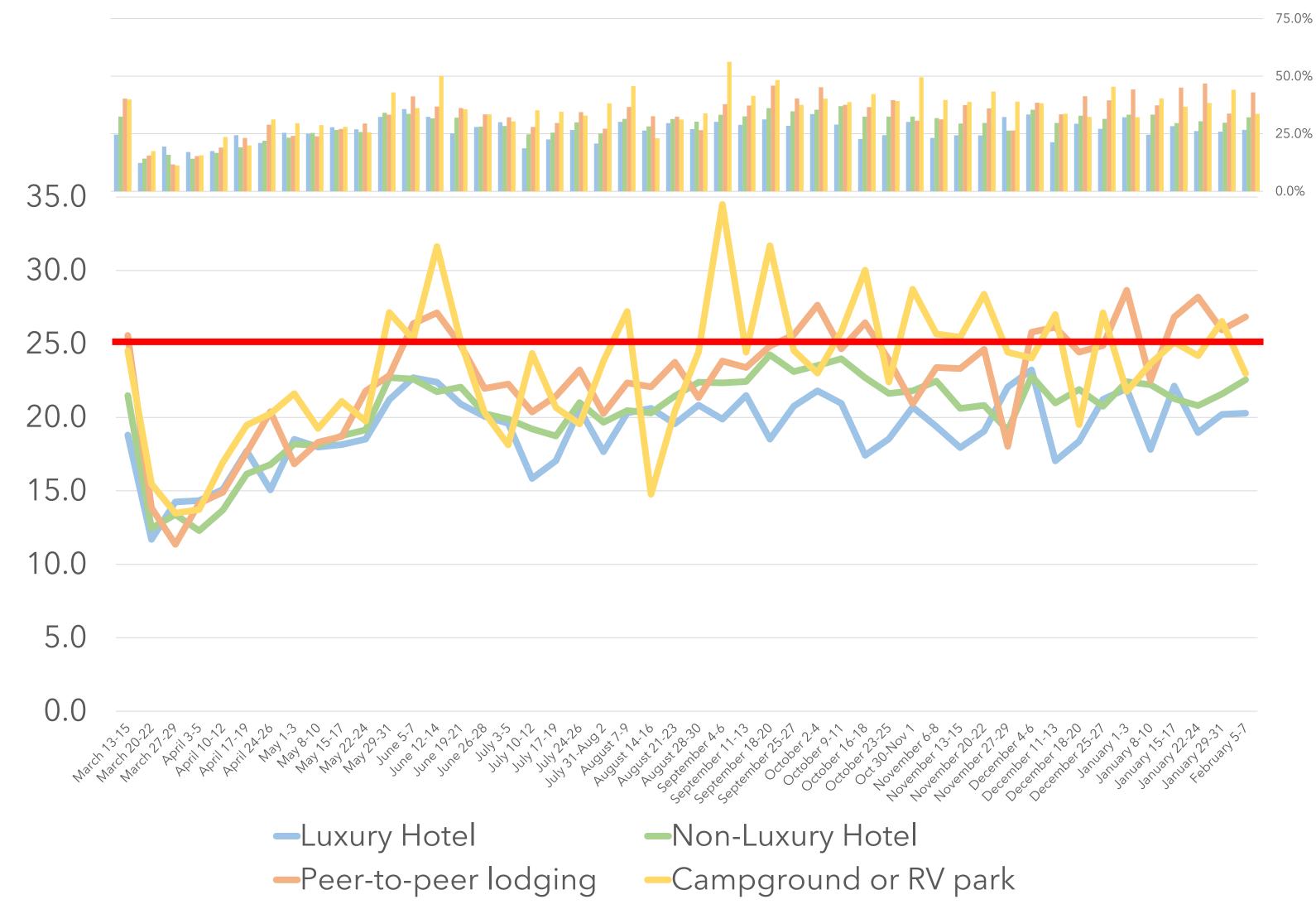














Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

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





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