DESTINATION ANALYSTS CORONAWIRUS TRAVEL SEMTIMENT INDEX REPORT KEY FINDINGS—WEEK OF JANUARY 18th, 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.

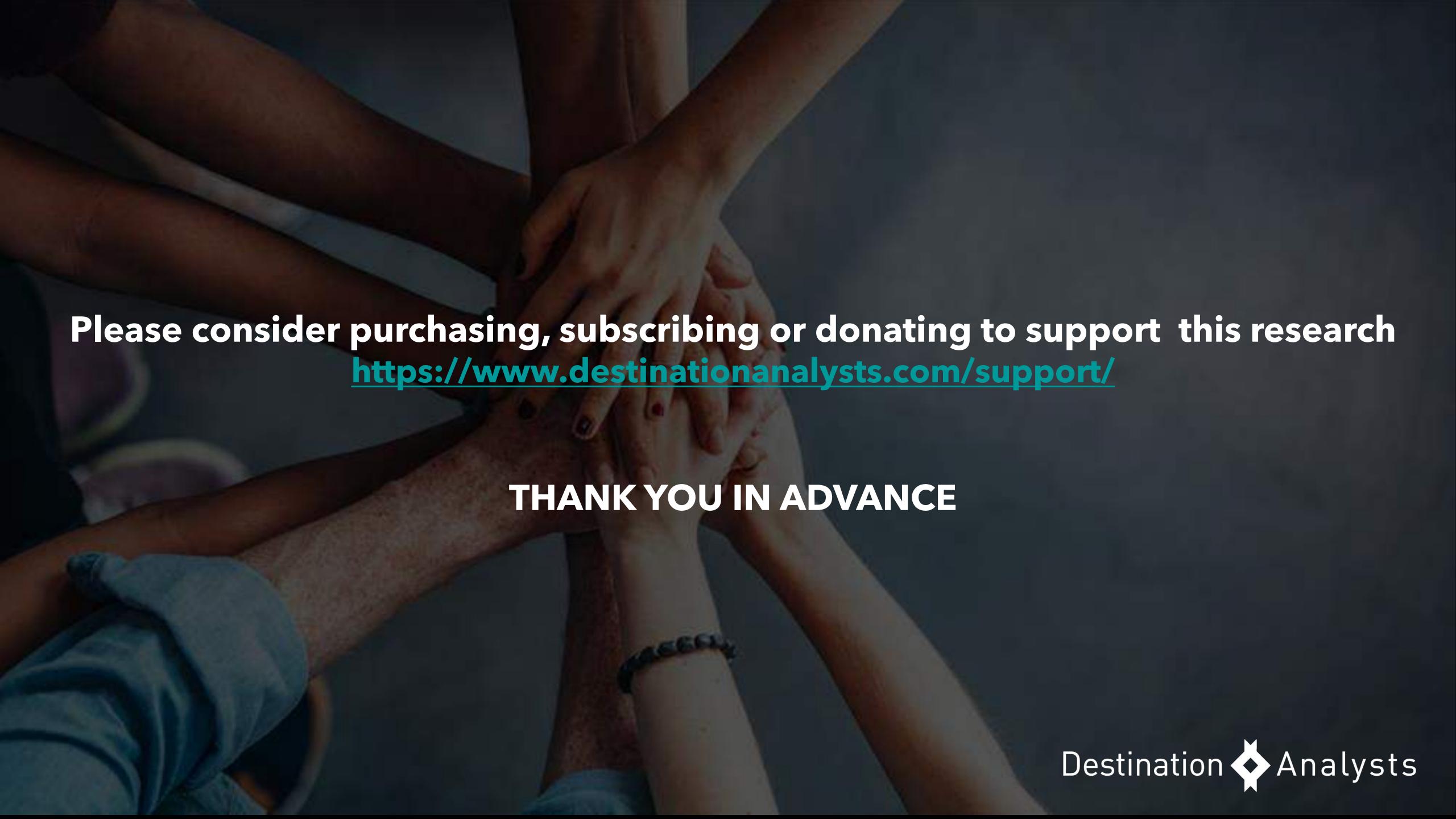
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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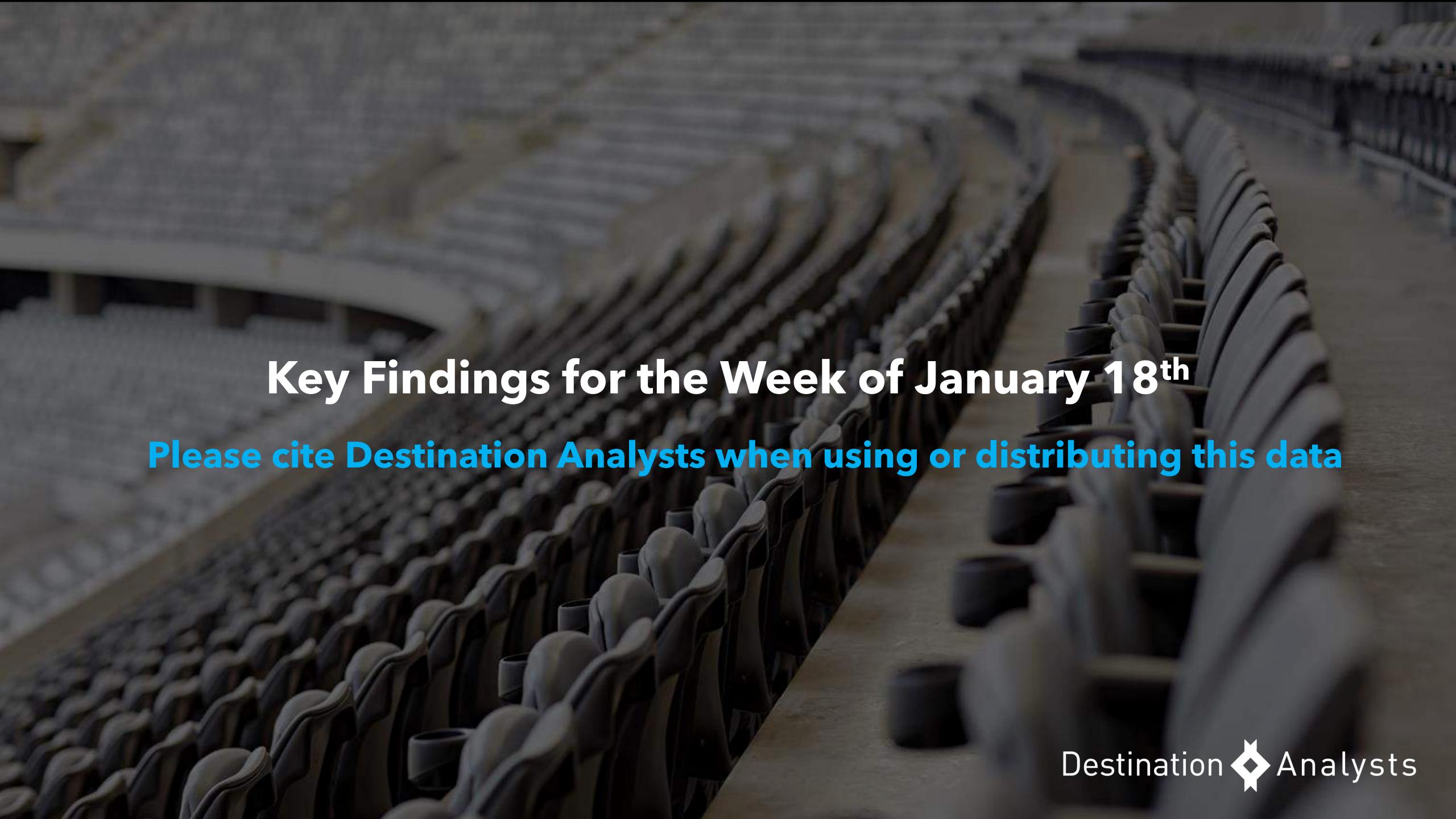


Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week's travel insights update will be followed by a panel of travel advisors from around the country who will discuss key travel trends for 2021.

Sign up to attend the webinar on Tuesday, January 19th at 11:00am ET <u>here</u>.





National Anxiety Map

Americans' anxiety about the pandemic quelled somewhat this week relative to last week. Save for the virus' impact on their personal finances—which bumped up slightly—the level of anxiety about other coronavirus related impacts—including on the national economy and their personal and friends/family's health—trended down from last week.

In a historic context, however, these all largely remain in an elevated state. Nevertheless, Americans continue to show that they believe better days are in sight. The percent of Americans who feel the pandemic situation in the U.S. will get worse in the next month fell another 6.5% this week to 43.2%, the lowest it has been since September 27th. Meanwhile, nearly a quarter believe that things will be better within the month.

NATIONAL ANXIETY MAP: HIGH CONCERNS ABOUT COVID-19'S IMPACT

AS OF JANUARY 17, 2021



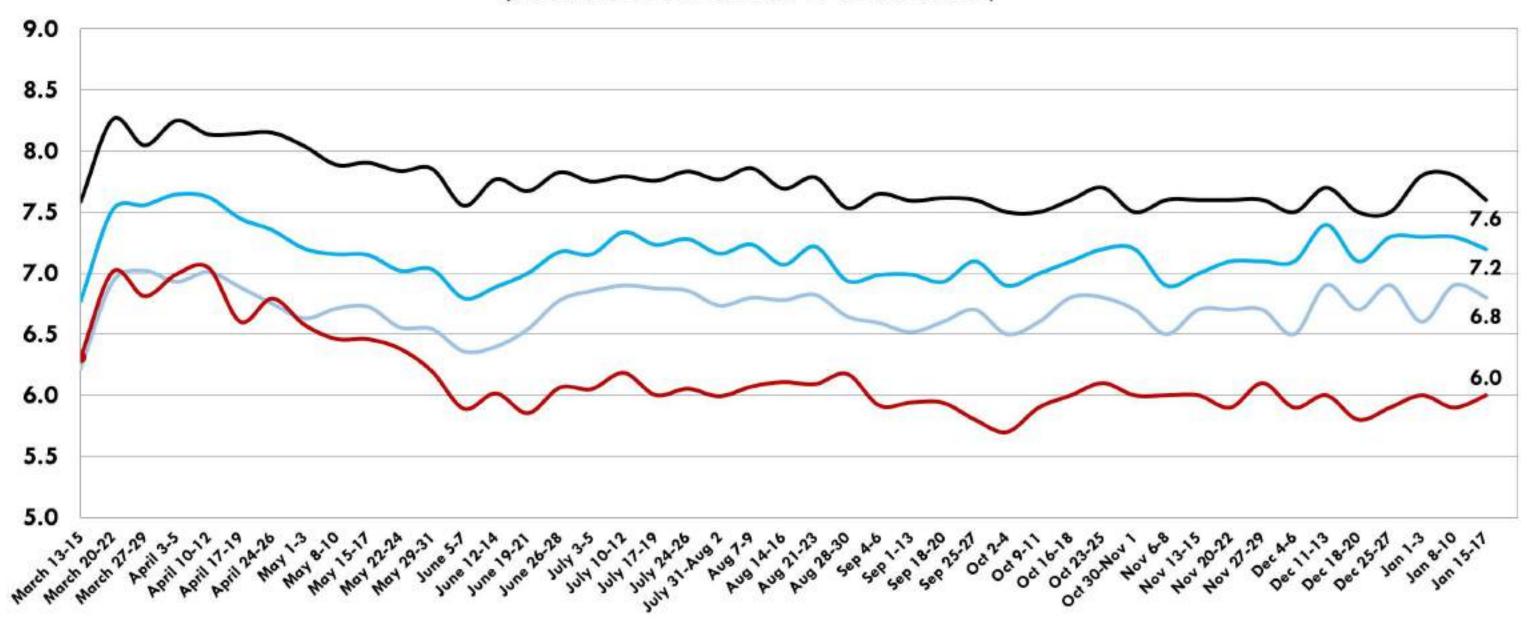






PERSONAL HEALTH

(AVERAGE SCORE ON AN 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 1-45 data. 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, 1,206, 1,205, 1,205, 1,204, 1,206, 1,207, 1,206, 1,225 and 1,205 completed surveys.)



Perception of Travel & Leisure Activities as Unsafe

Although anxiety came down a bit, so did the highs seen last week in travel sentiment.

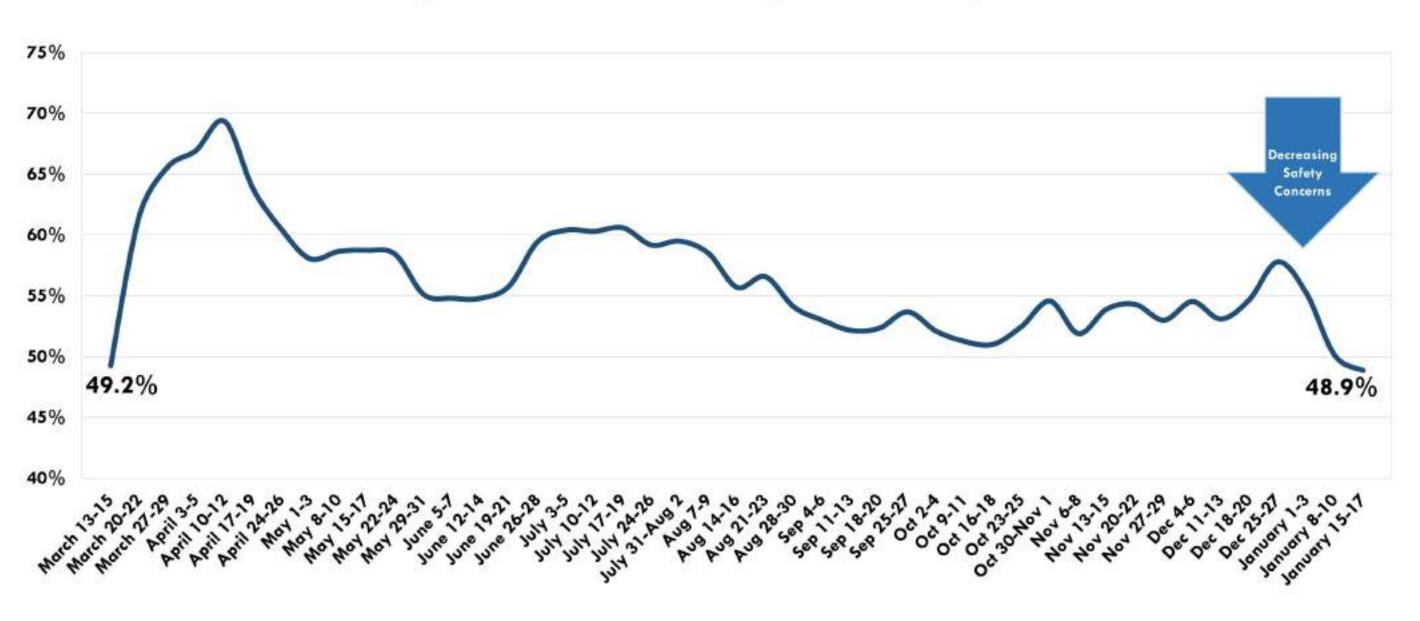
For example, those in a travel readiness state-of-mind dropped to 55.5% after reaching 58.6% last week, and the level of openness to travel inspiration dipped to 5.9 after reaching 6.0 last week. The modest decline in travel sentiment was seen across generations, although Boomer travelers are generally significantly less ready, excited and open to inspiration than younger travelers, even over the rest of 2021. Millennial travelers, for instance, are more than 3 times as likely to say their travel behaviors and trips this year will be to make up for the lost time in their travel lives (27.7% say this, compared to just 7.9% of Boomers). Nevertheless, when Boomer travelers do take their next trip by airplane, it will be to somewhere further compared to those in younger generations: 1,267 miles away on average compared to 875 miles.

And despite the small dip this week across ages, note that travel sentiment overall remains in one of the better positions it has been in throughout the pandemic. Fortunately, one metric that did continue a positive trend is the retreat in perceptions of travel and leisure activities as unsafe—which dropped to 48.9% and is now lower than where it was March 15th.

PERCEPTION OF TRAVEL & LEISURE ACTIVITIES AS UNSAFE

MARCH 15, 2020 - JANUARY 17, 2021

% of American Travelers Rating as "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 1-45 data. 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, 1,201, 1,207, 1,206, 1,225 and 1,205 completed surveys.)



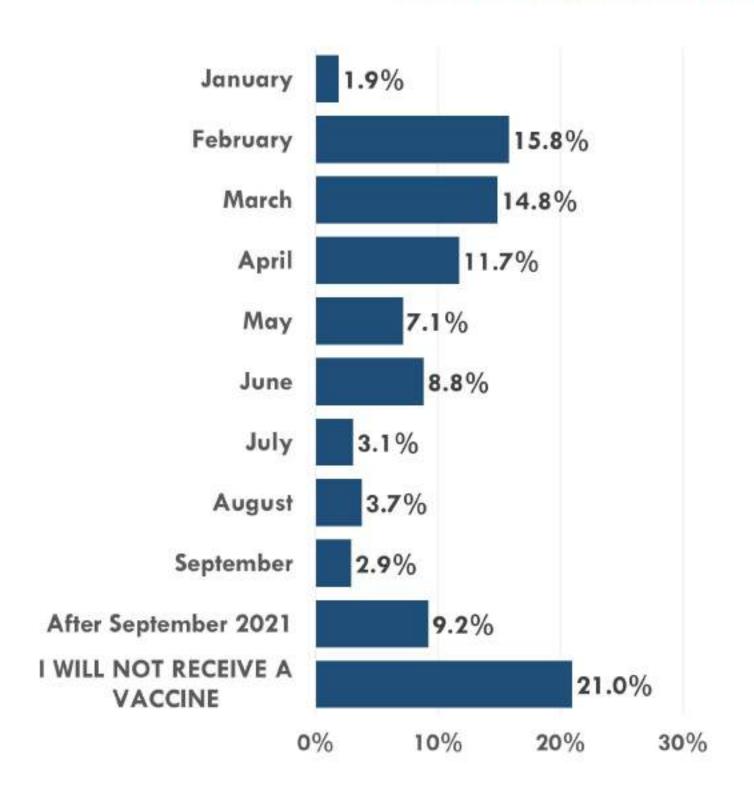
When American Travelers Expect to be Vaccinated

With the availability and distribution of COVID-19 vaccines a major factor in the return to normalcy for many travelers, this week 49.7% say they will avoid travel until vaccines are made widely available.

Although 63.4% believe the COVID-19 vaccines are safe, this is down somewhat from last week (67.8%). Also down are the percent who expect to take a COVID-19 vaccine (58.6%) and the optimism the vaccines are inspiring about travel safety (51.0%) and an overall return to normal in the next six months (56.3%).

The infographic at right shows the month American travelers expect to get inoculated against the virus. Boomers are most expecting to take the vaccine (70.9% provided an affirmative yes, compared to 46.2% of Millennials) and, given their prioritization for vaccination, over two-thirds expect they will be vaccinated by June. Boomer travelers are far likelier than younger travelers to feel the COVID vaccines are safe. Interestingly, travelers in the South are more than twice as likely to say they won't receive a vaccine as those in other regions of the country (28.5% say the will not take it; less than 20% of travelers in other regions say they will not).

WHEN AMERICAN TRAVELERS EXPECT TO BE VACCINATED AS OF JANUARY 17TH



EXPECTED VACCINATION BY JUNE 2021

BY GENERATION:

Millennials/Gen Z: 52.7%

Gen X: 56.5% Boomers: 68.6%

BY REGION:

West: 66.9%

Midwest: 61.3%

Northeast: 62.8%

South: 54.3%

Question: Given what you know now, in which month do you expect to receive a vaccine? (Select one)

(If you are uncertain, select the month you think is most likely you will get a vaccination)

(Base: Wave 45 data. Respondents who have not yet been vaccinated, 1,018 completed surveys. Data collected January 15-17, 2021)



Trip Characteristics of Interest in 2021

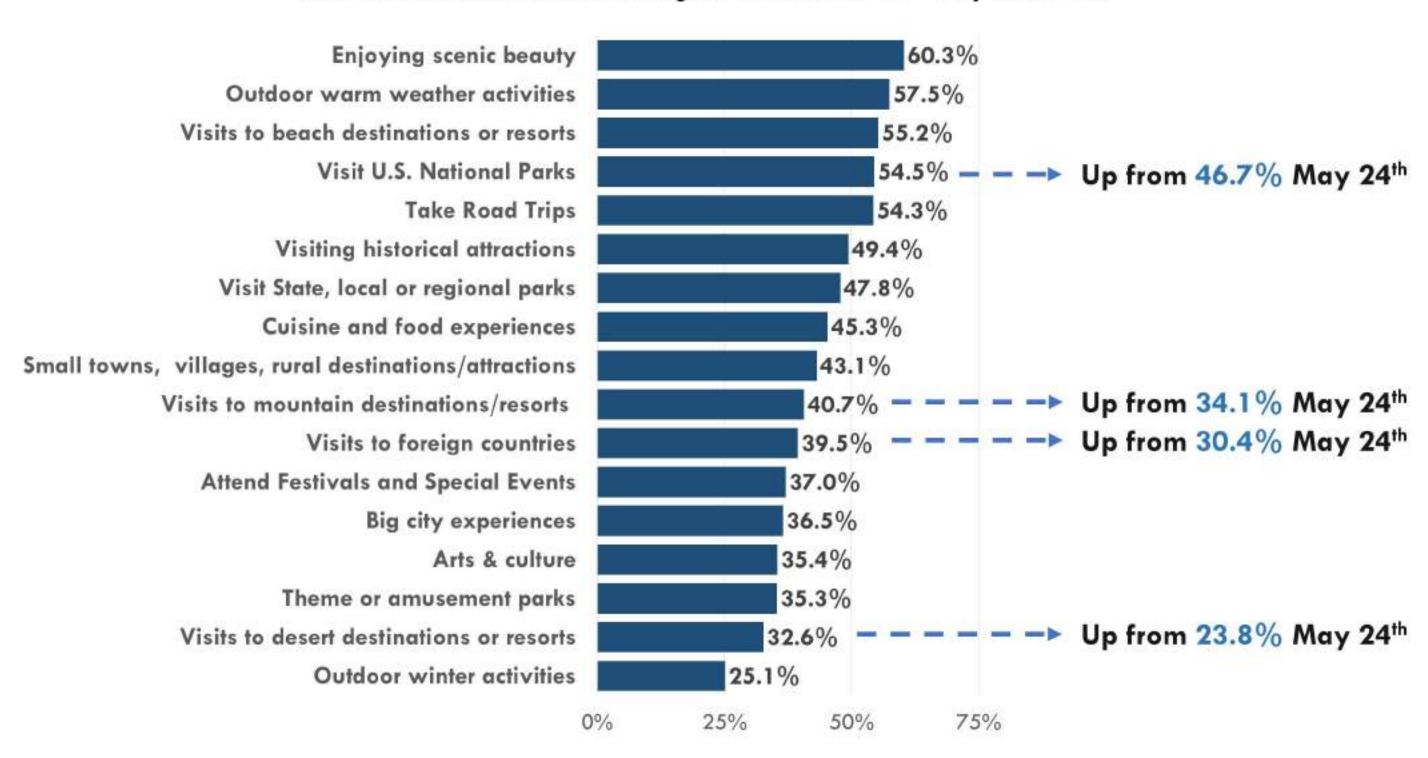
In terms of what Americans are looking for in travel experiences in 2021, right now scenic beauty, outdoor activities in warm weather, beach destinations and resorts, National Parks and road trips are predominant in their minds.

With the virus still raging, big city and food experiences do not weigh as heavy as they did in pre-pandemic times.

Compared to when this question was posed in May 2020, interest in National Parks, mountains, deserts and international destinations has grown.

TRIP CHARACTERISTICS OF INTEREST IN 2021 AS OF JANUARY 17TH

% of American Travelers Rating as "Interested" or "Very Interested"



Question: In general how interested are you in taking leisure trips which would include the following:

(Base: Wave 45 data. All respondents, 1,205 completed surveys. Data collected January 15-17, 2021)



When Americans will be Comfortable Traveling for Live Events & Festivals

One of the big questions for travel in 2021 is if live events and festivals will be held and if travelers will be willing to attend them.

Of those Americans who attend such events, 38.9% say they are missing these events to a significant degree.

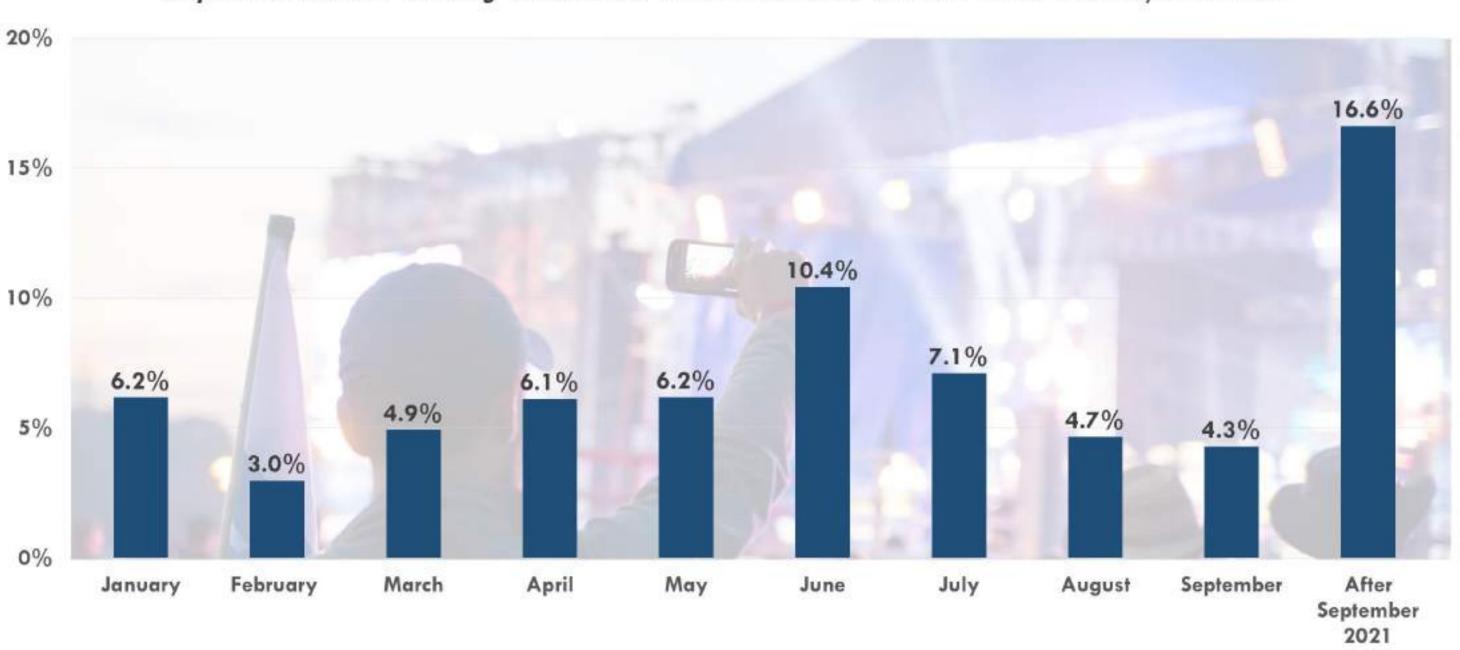
Right now, over a third (36.8%) say they would be comfortable traveling to attend such an event by June; the rest need more time.

Looking at strategies to combat the spread of COVID-19 at events, if all attendees were required to take a COVID-19 test and present a negative result to enter the event, 45.2% of American travelers said this would make them more comfortable. If all attendees were required to show proof of vaccine, 51.0% said this would make them more comfortable attending.

WHEN AMERICANS EXPECT THEY WILL BE COMFORTABLE TRAVELING FOR LIVE EVENTS & FESTIVALS

AS OF JANUARY 17, 2021





Question: When (at the soonest) do you expect you will feel comfortable attending a live event or festival while traveling? (I.e., at a place 50-miles or more away from your home) (Select one)

(Base: Wave 45 data. Respondents who attend live events, 1,047 completed surveys. Data collected January 15-17, 2021)

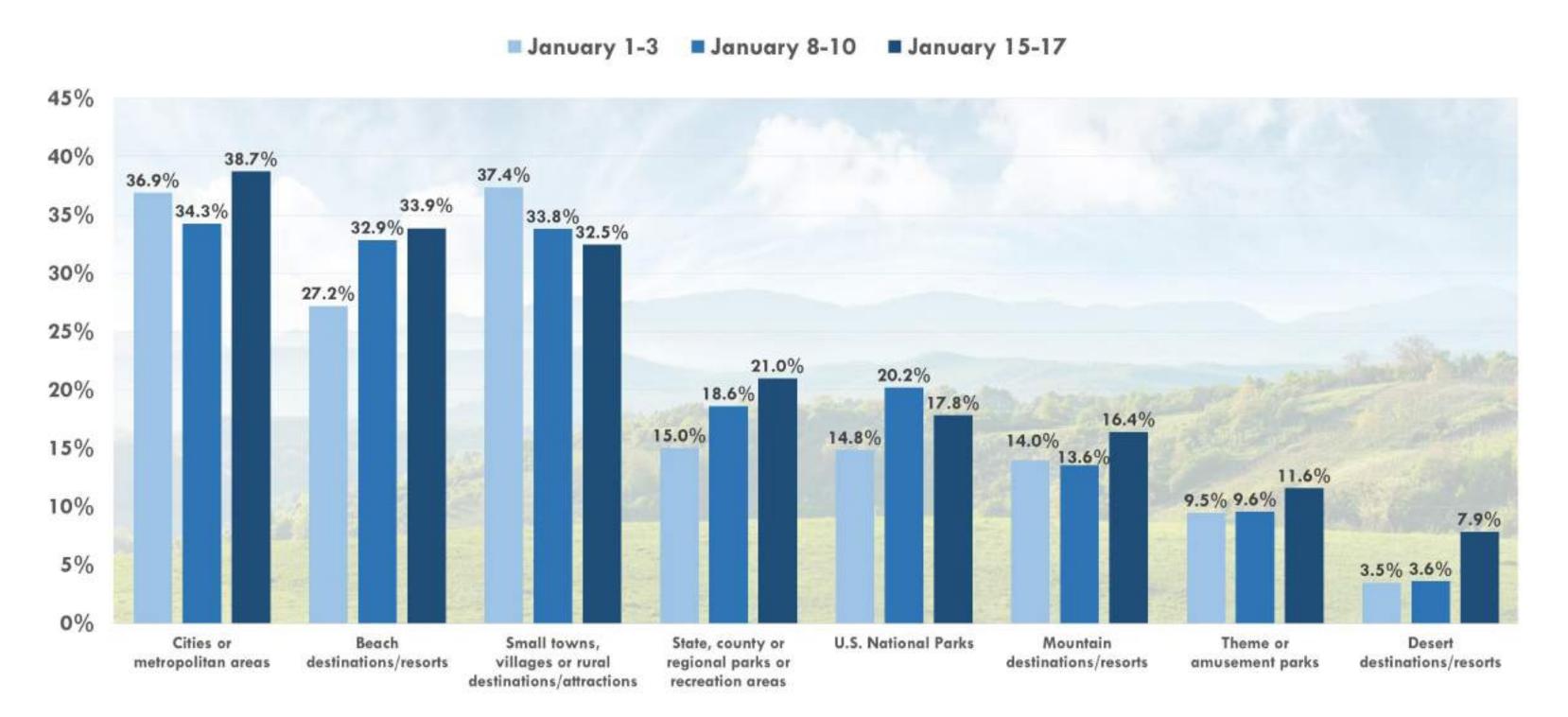


Destination Types Americans Expect to Travel to in the Next Three Months

Looking specifically at the outlook for the next 3 months, the average number of reported trips in this period is 1.1, up from 1.0 last week. In total, 47.6% of American travelers expect to take a trip in the next 12-weeks. When those that are traveling in this period were asked about the destination types they expect to visit, there has been a modest increase in expectations for travel to cities and beaches, as well as state and regional recreational areas and mountain destinations.

DESTINATION TYPES AMERICANS EXPECT TO TRAVEL TO IN THE NEXT THREE MONTHS

(WEEKS OF JANUARY 1ST - JANUARY 17TH)



Question: On these leisure trips, which of the following are you expecting to visit?

(Base: Waves 43-45 data. All respondents who expect to take at least one leisure trip during the next three months, 436, 587 and 596 completed surveys.)



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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.

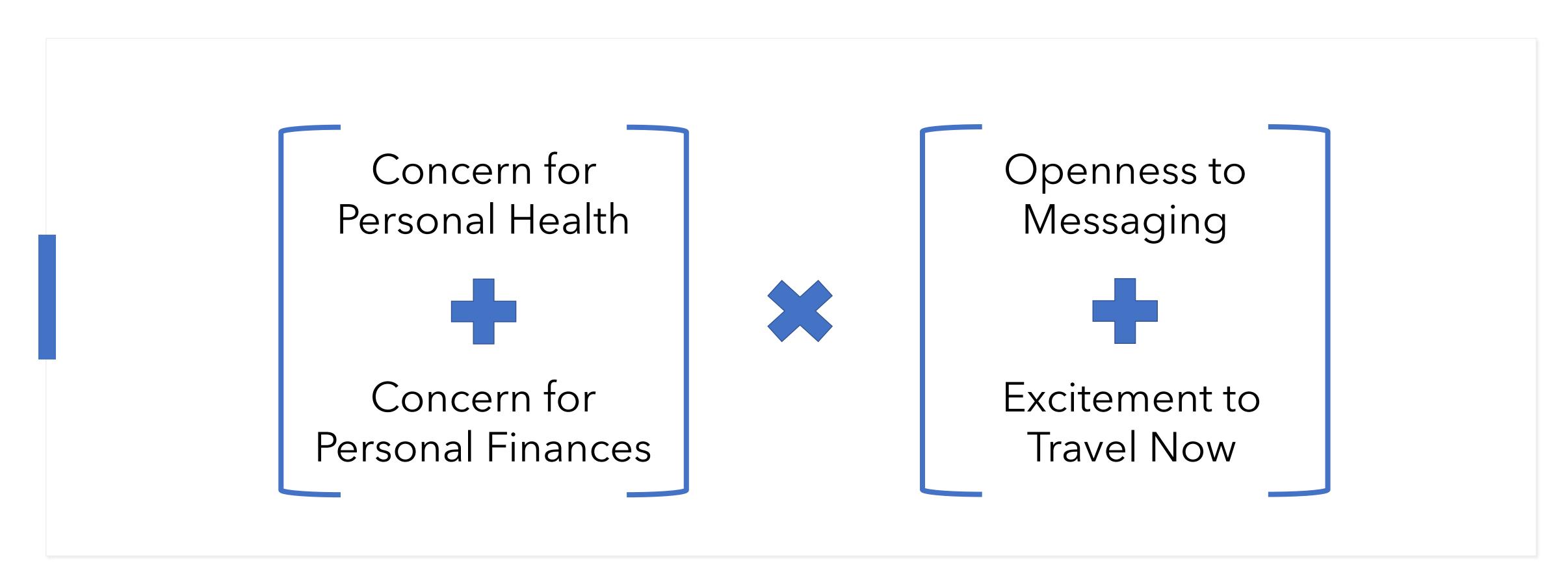


The goals are to identify:

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



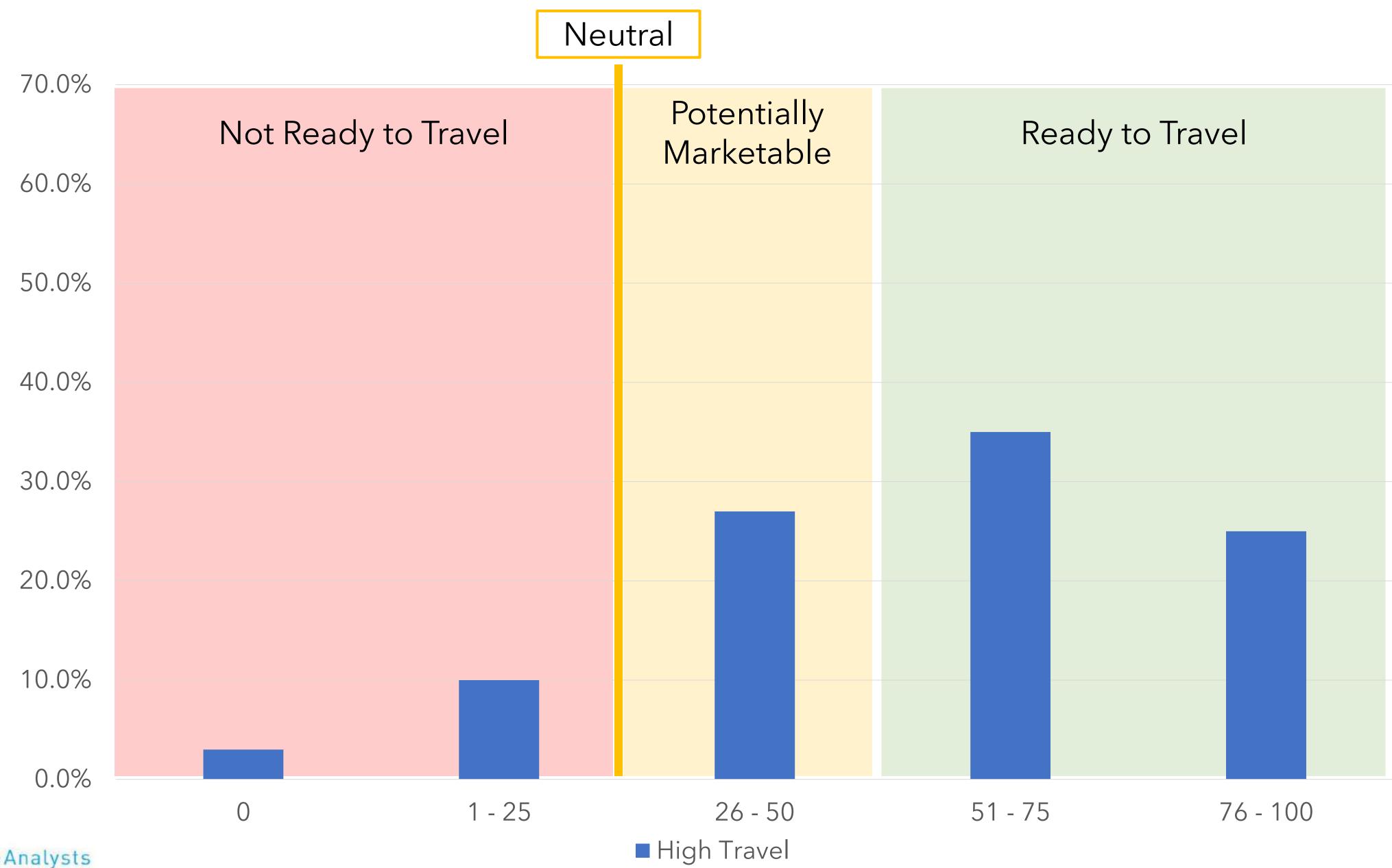
Predictive Index Formula



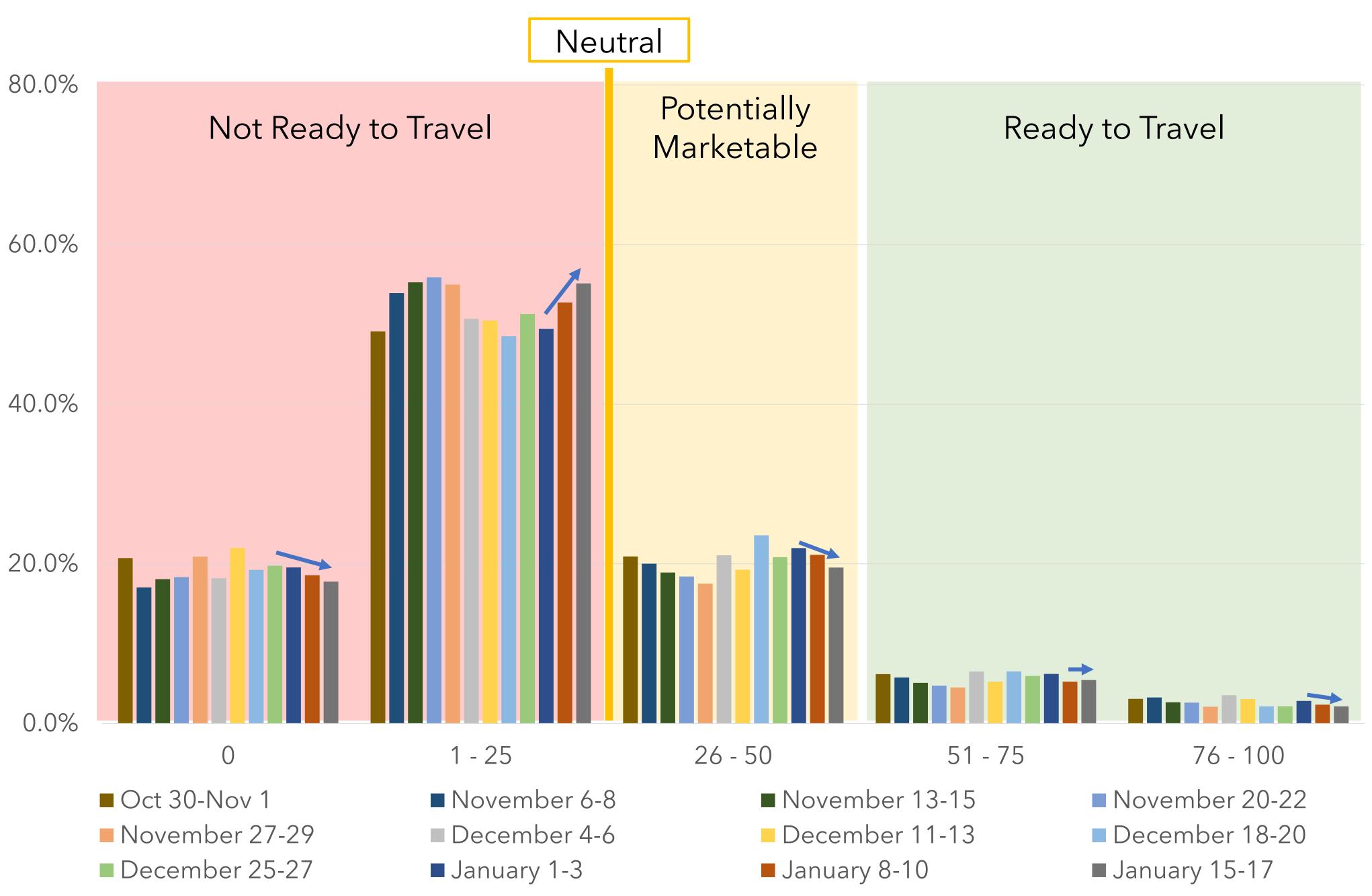
*Normalized to a 100pt scale

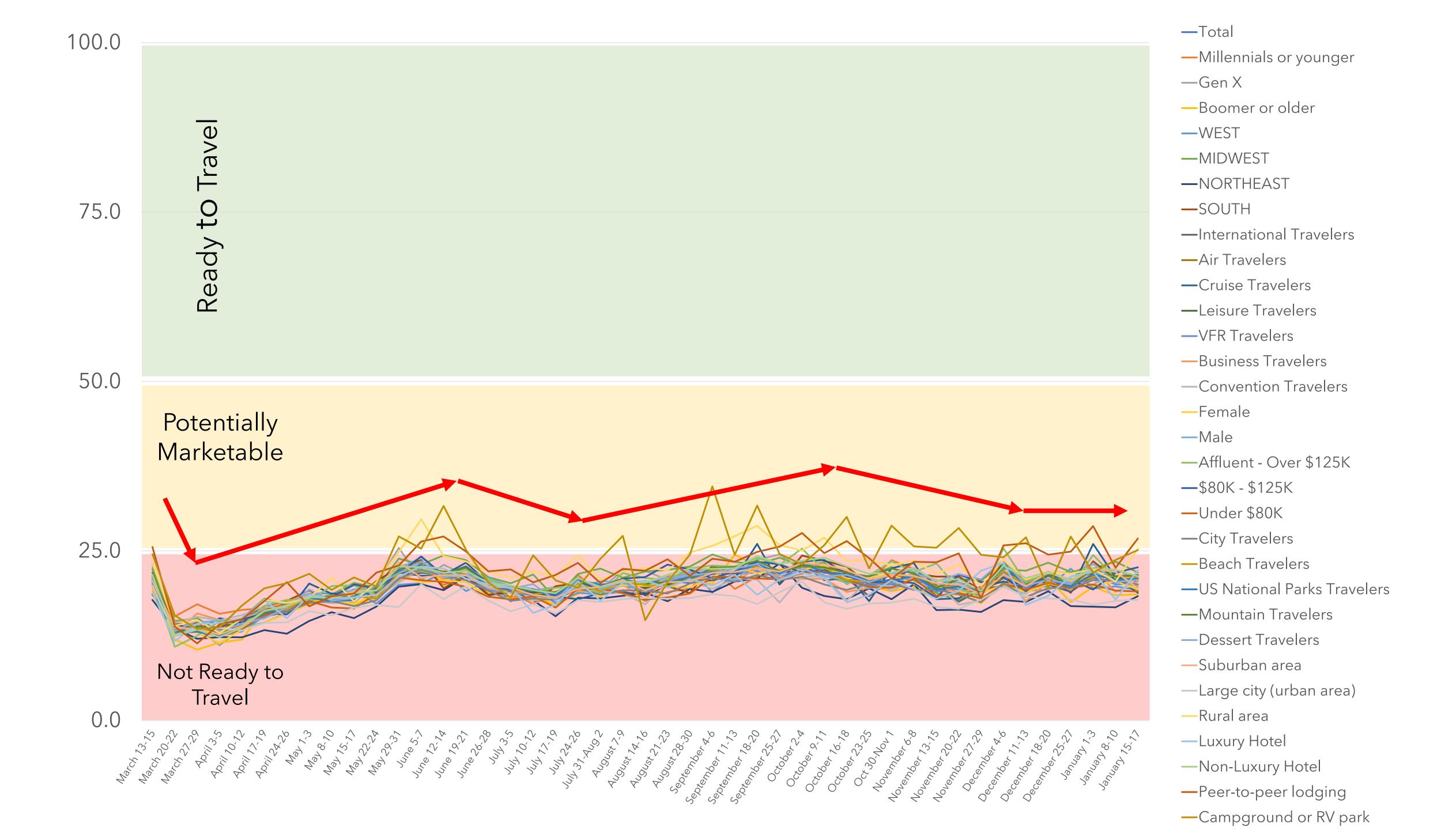


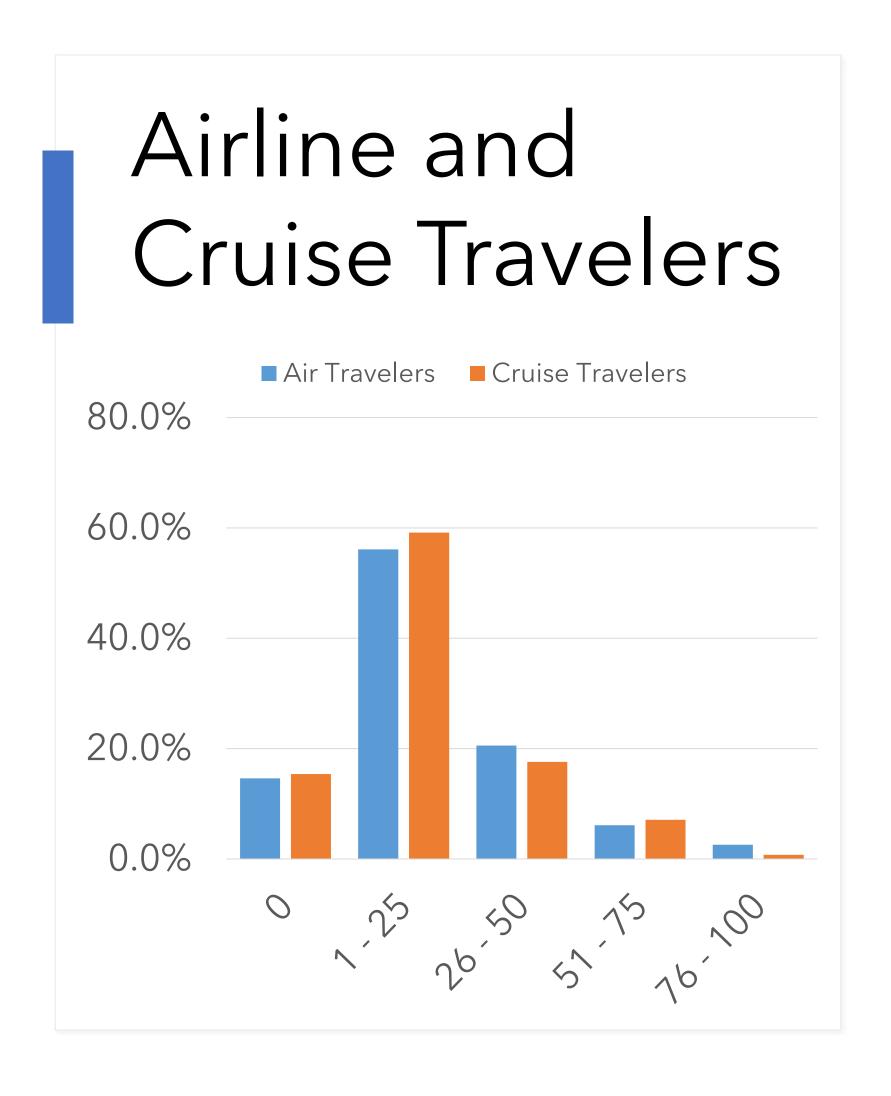
Healthy Travel Outlook

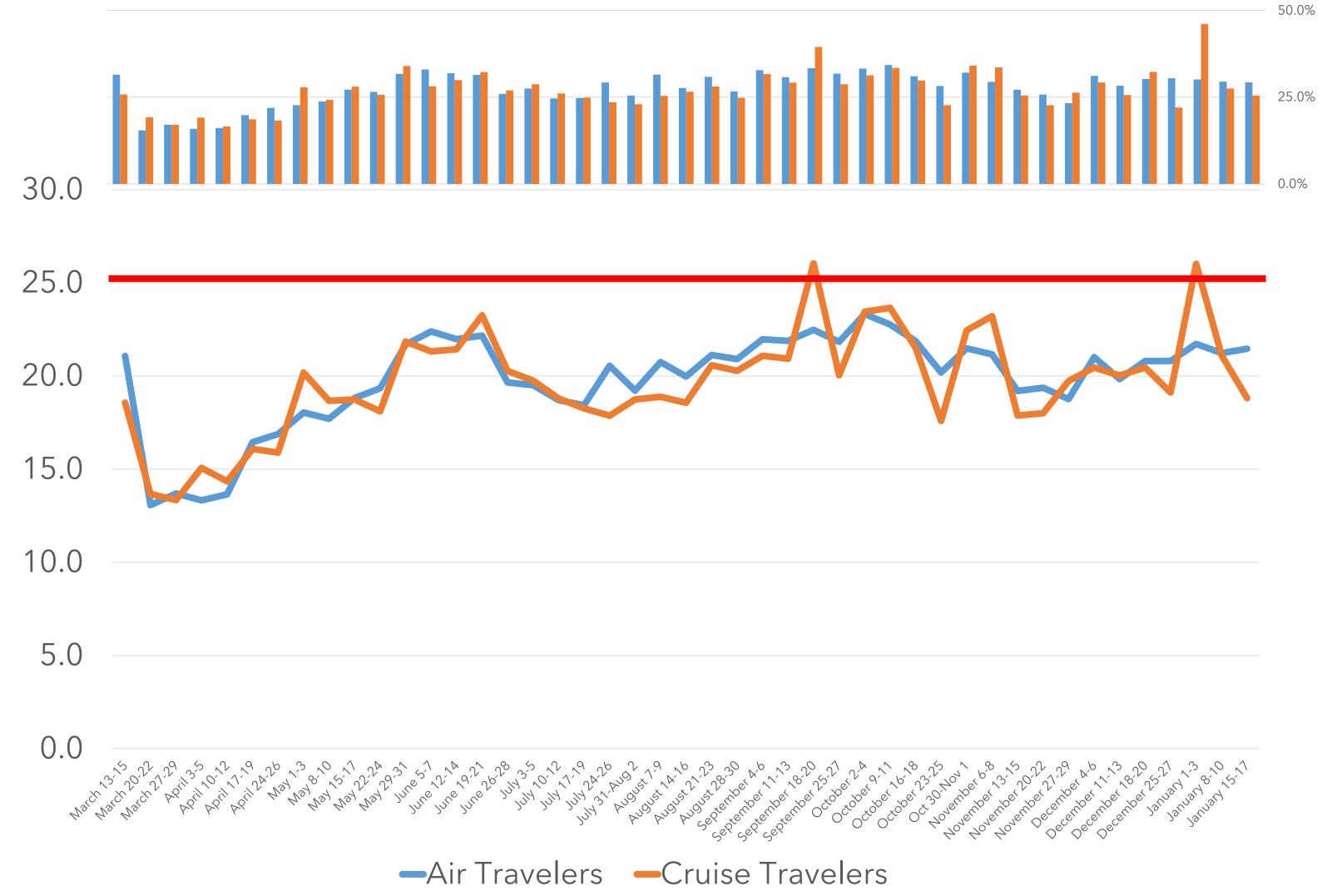


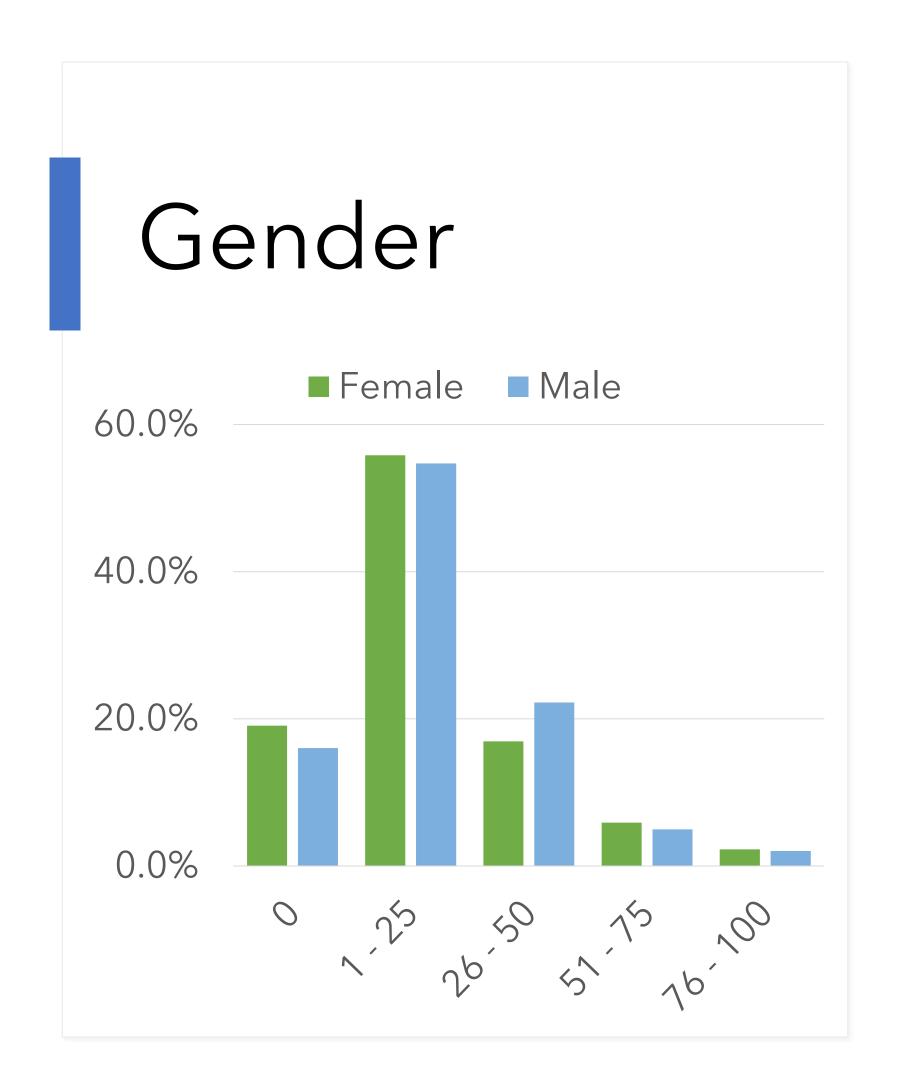
Current Travel Outlook

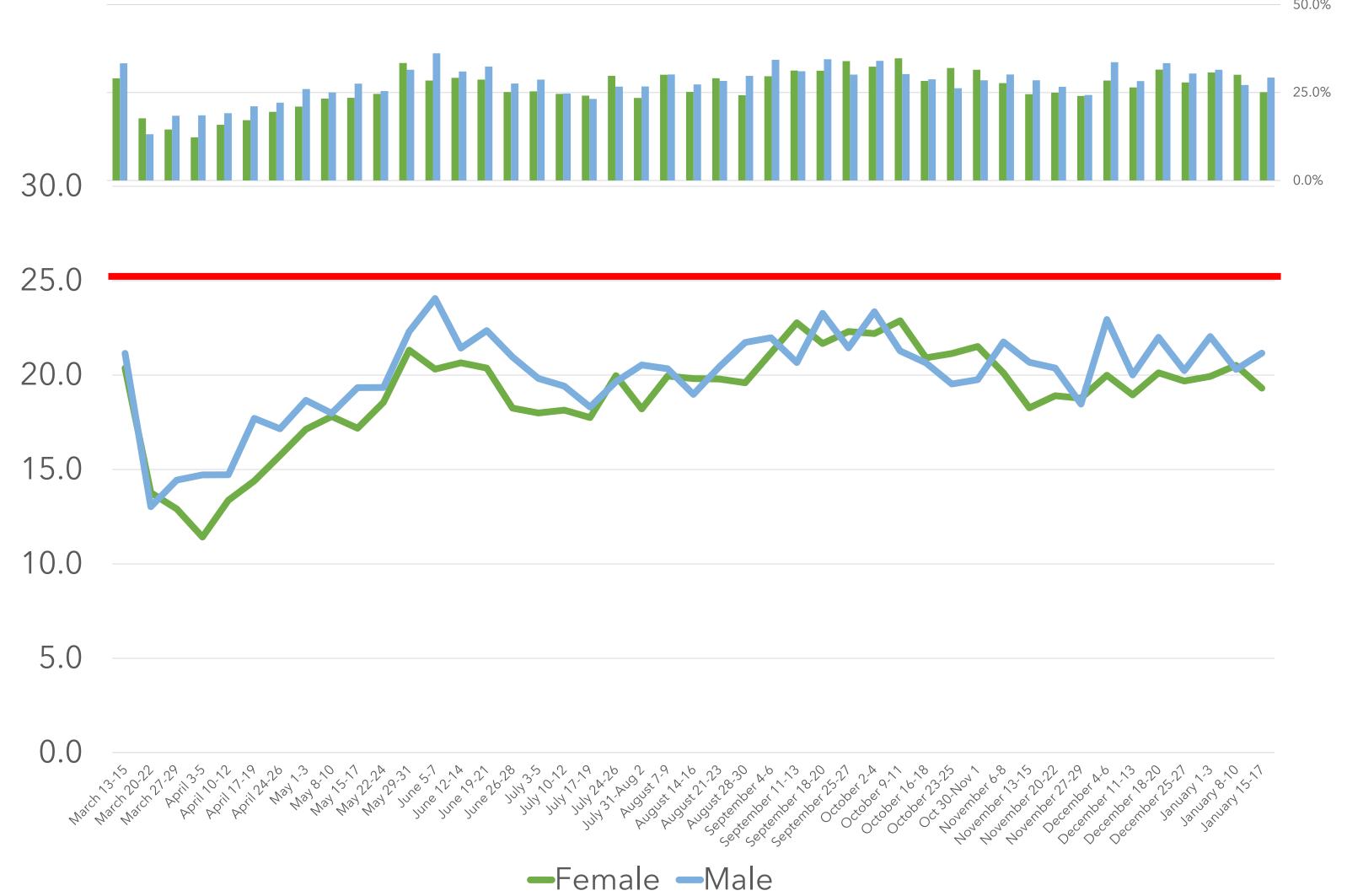


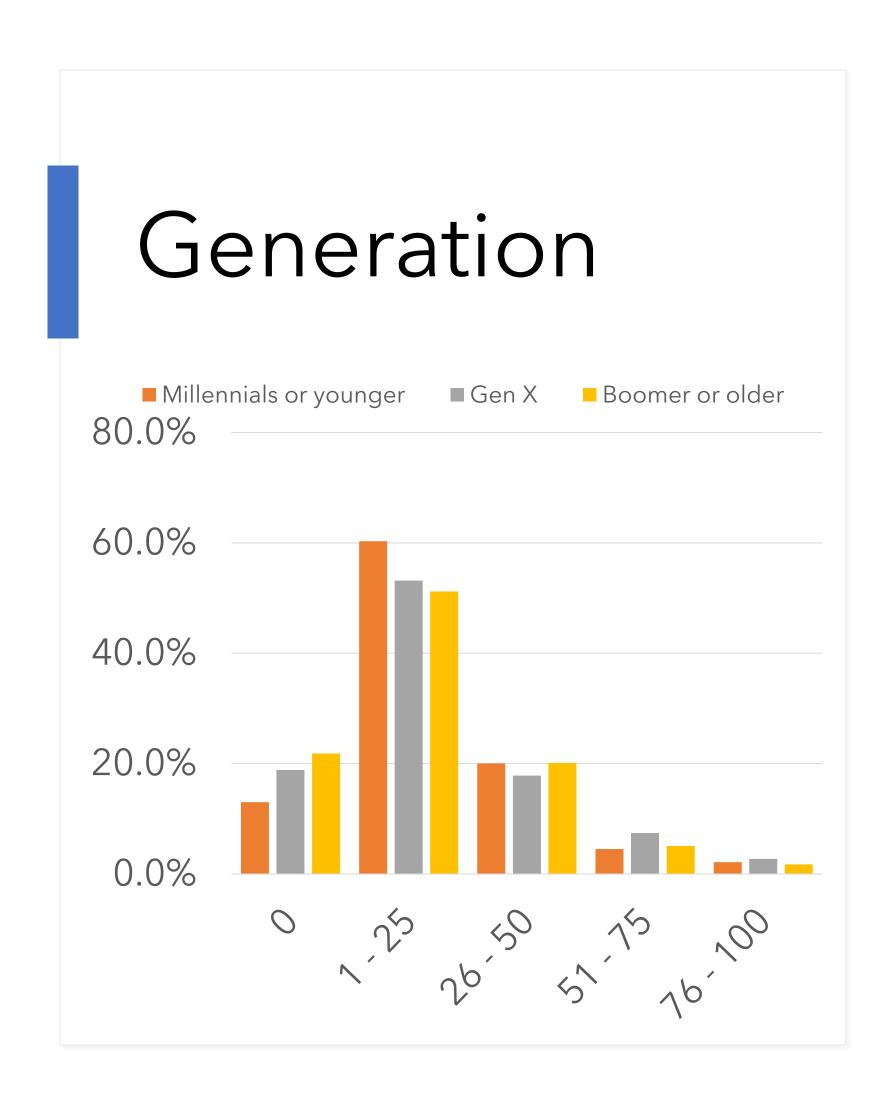


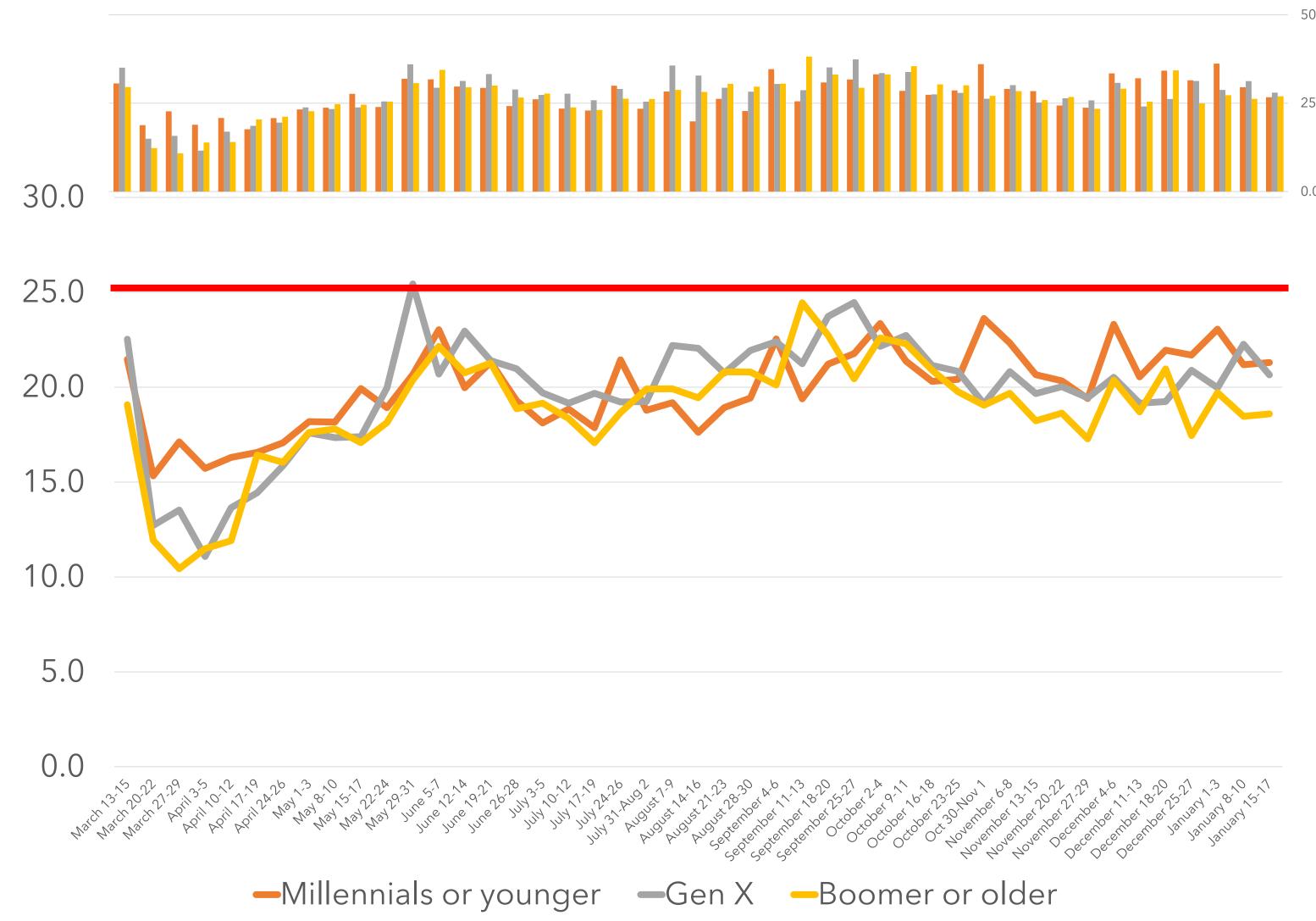


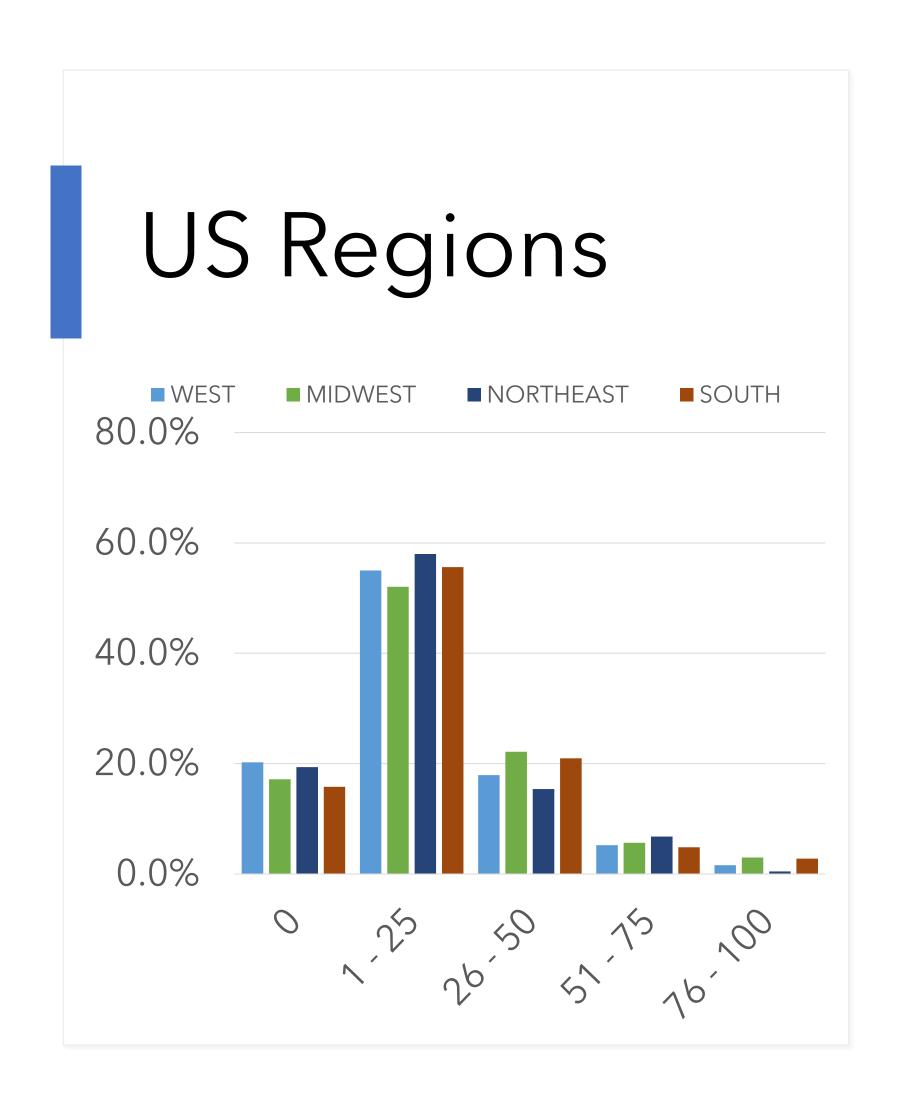


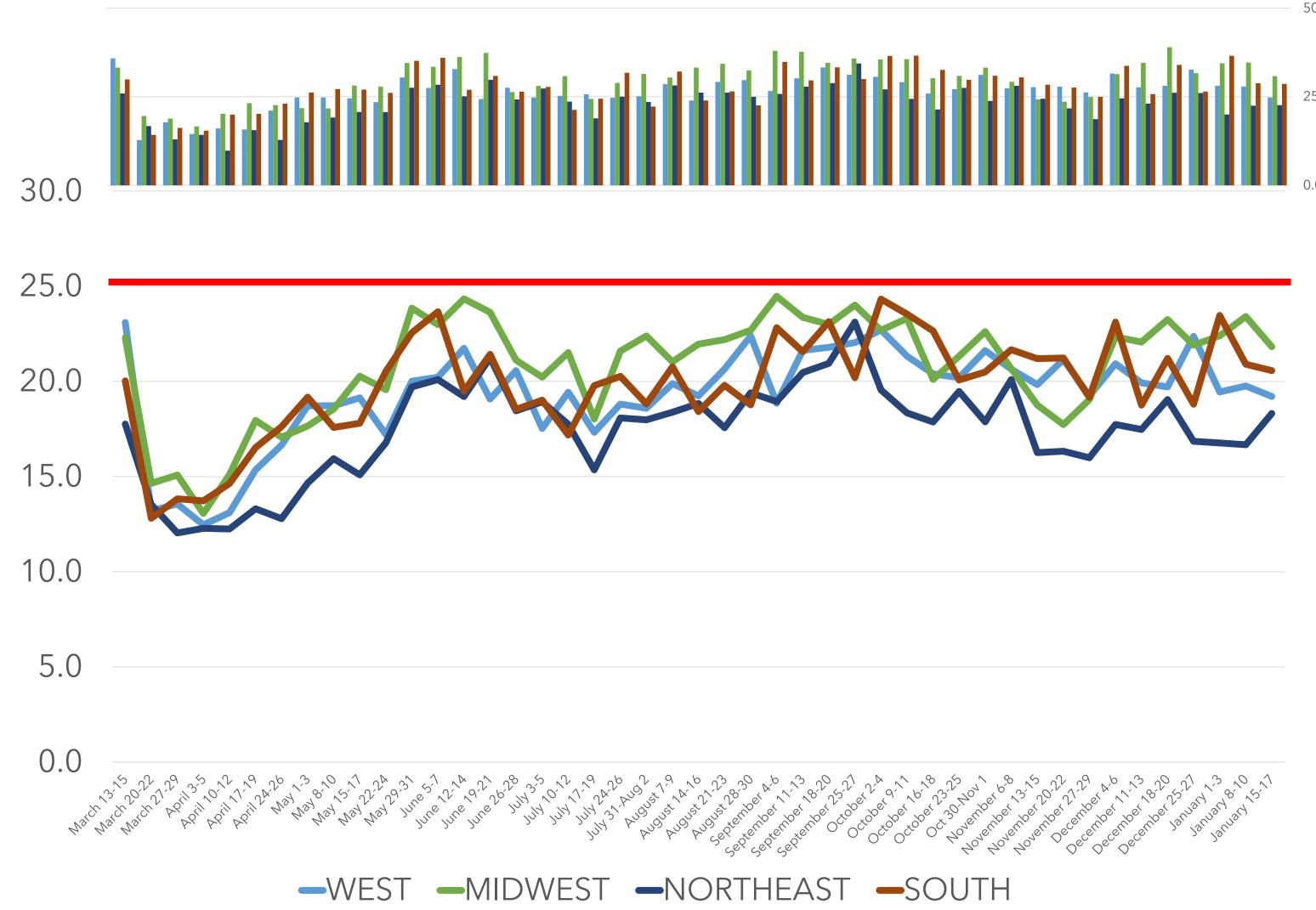


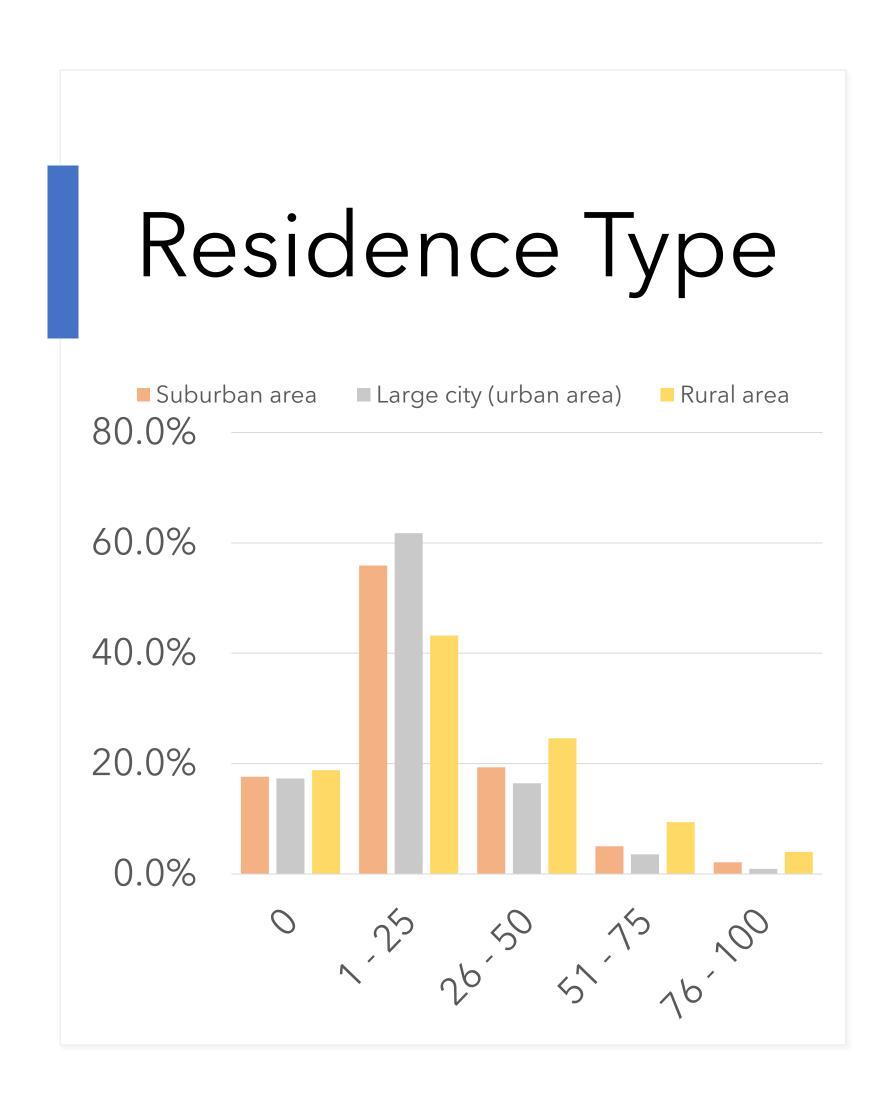


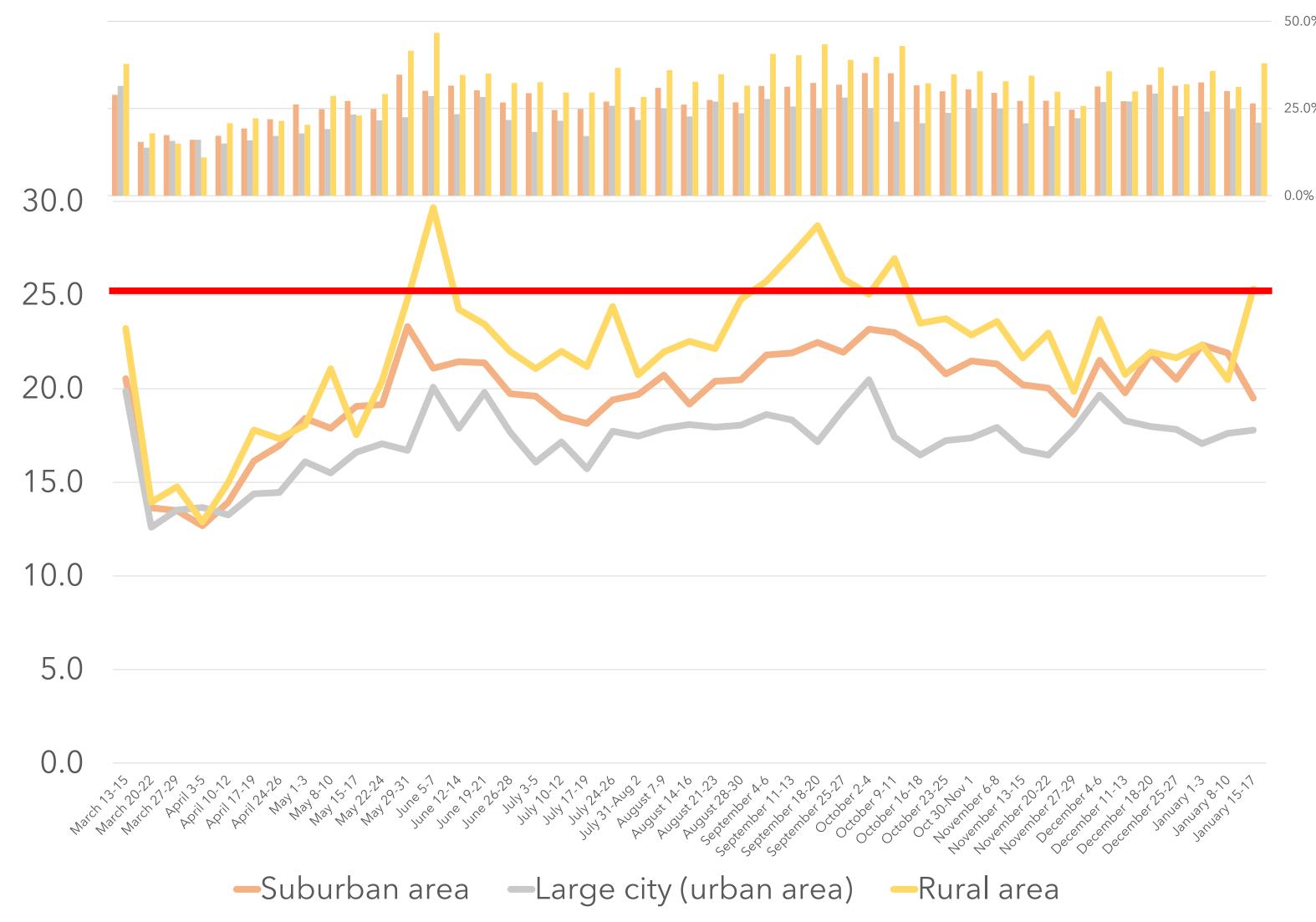


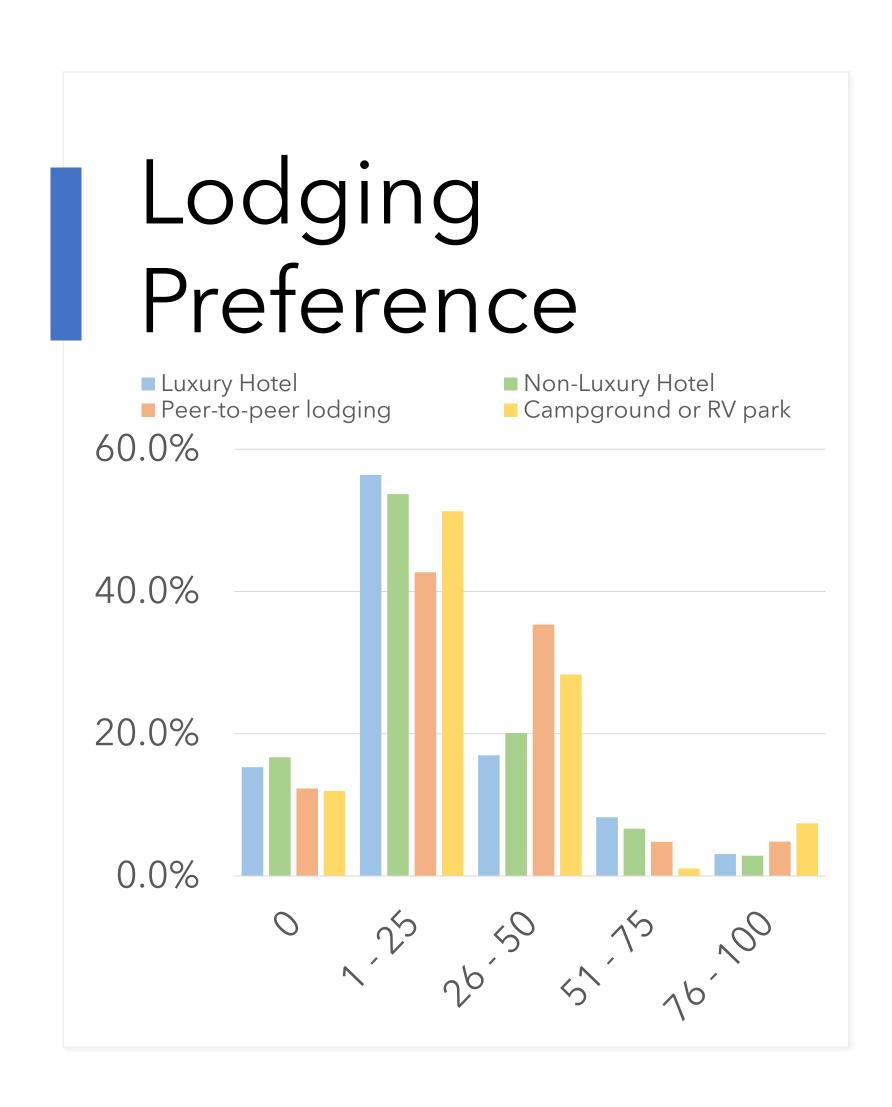
















Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

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





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JANUARY 26, 2021



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