DESTINATION ANALYSTS CORONAWIRUS TRAVEL SEMTIMENT INDEX REPORT KEY FINDINGS—WEEK OF JANUARY 25th, 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.

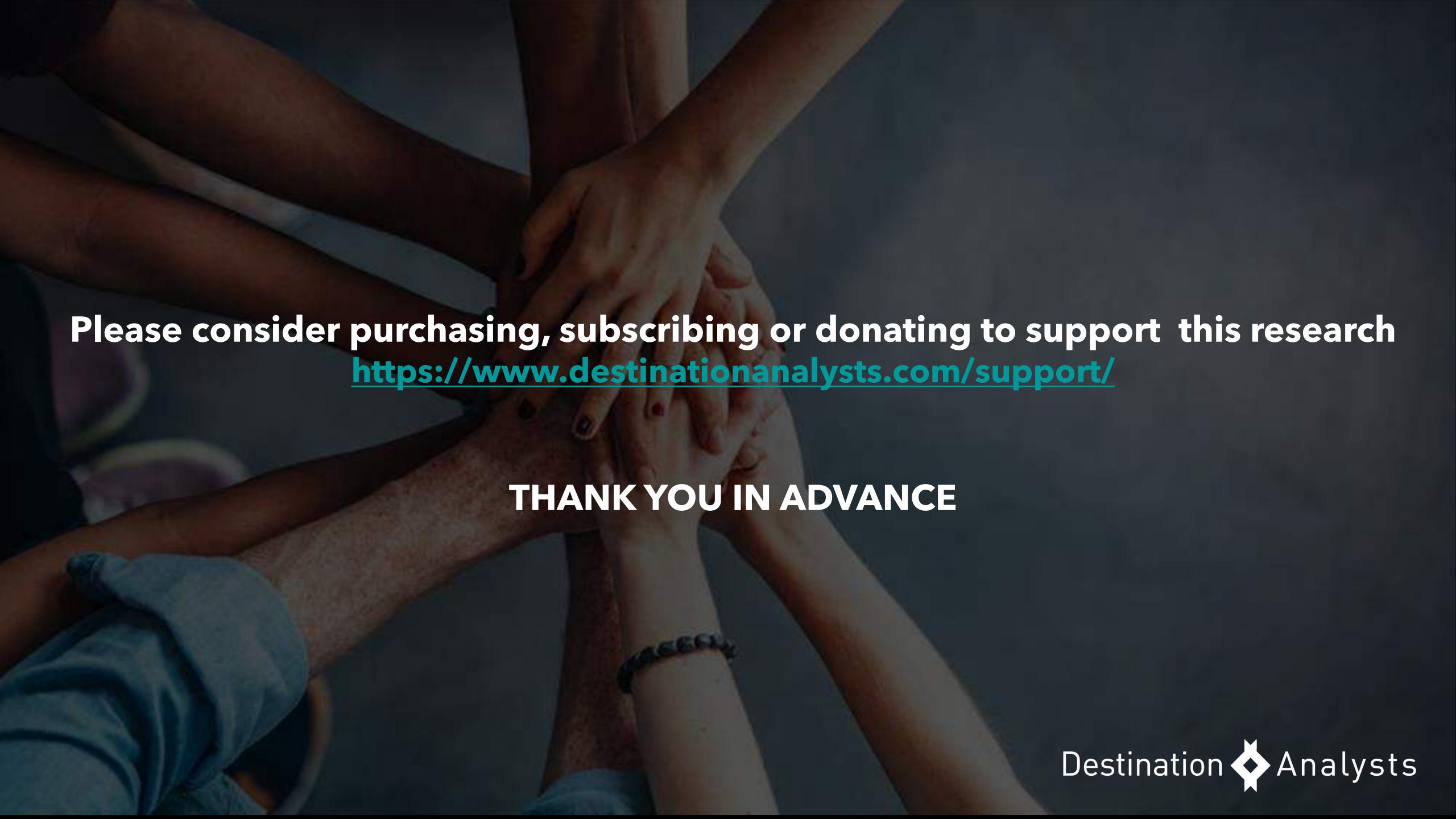
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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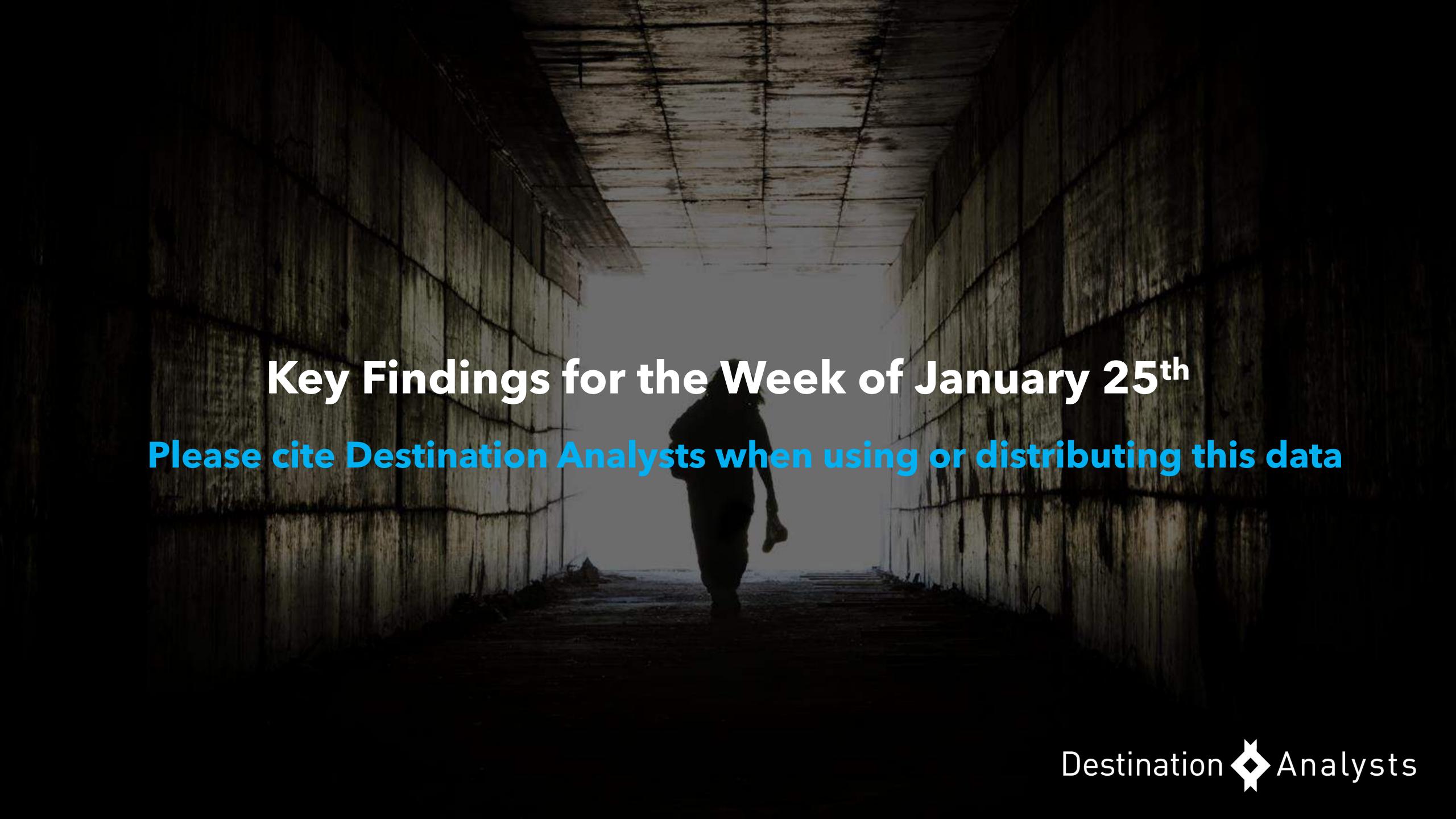


Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

Following this week's travel insights update, we will be joined by industry professionals who market rural destinations. Tune in to hear what these professionals have to say about how their marketing strategies have changed and what's in store for 2021.

Sign up to attend the webinar on Tuesday, January 26th at 11:00am ET <u>here</u>.





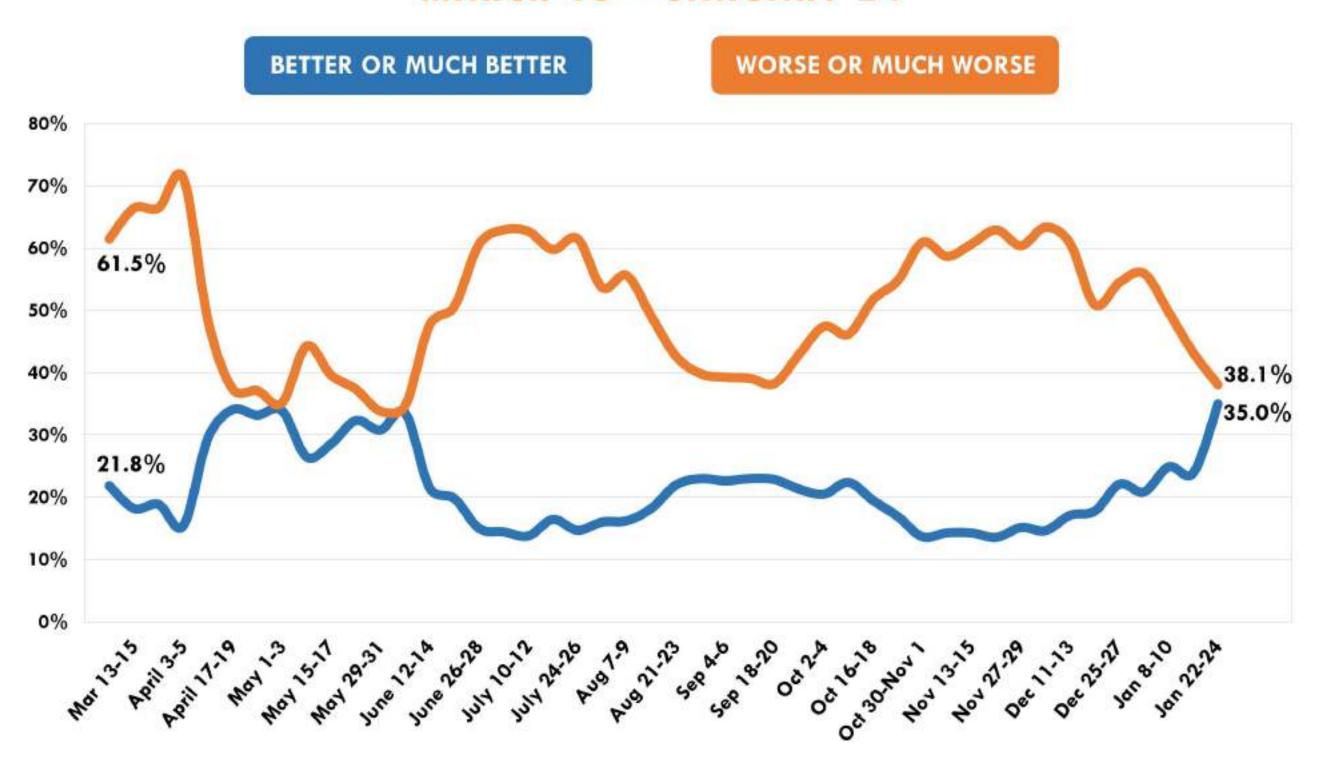
Expectations for the Coronavirus Situation in the U.S.

As confirmation of new strains of COVID being detected make headlines, Americans' anxiety about the pandemic is up. The percentage of Americans highly concerned about personally contracting the virus (74.3%), their friends or family contracting the virus (79.6%), the pandemic's impact on their personal finances (58.3%) and its impact on the national economy overall (86.7%), all increased this week—and, in fact, are among the highest levels they have ever been.

But Americans also keep growing more optimistic about the future, seemingly seeing the light at the end of the tunnel grow larger and closer. This week, 35.0% said they feel the pandemic situation is going to get better in the next month. The only other times this measure of optimism reached this level were the weeks of May 4th and June 8th. Meanwhile, feelings that the pandemic situation will worsen in the next month dropped again and is now at 38.1%.

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

MARCH 13 - JANUARY 24



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 1-46 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, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205 and 1,206 completed surveys.)



Americans' Excitement for Travel

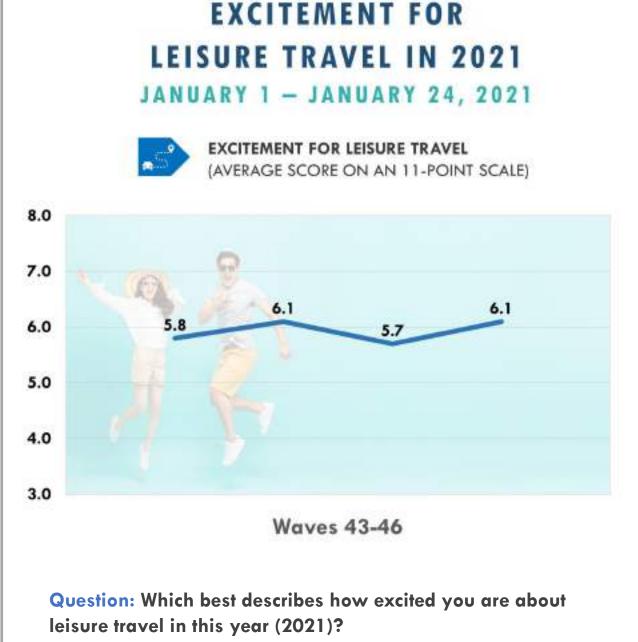
This more hopeful outlook for the near future has lifted excitement about travel in spite of current anxieties. Although 48.2% of American travelers still have lost their taste for travel for the time being, their excitement levels for potential getaways and their 2021 travel vision, as well as their openness to travel inspiration, all grew and are in a pandemic-era high period (5.7, 6.1 and 6.1 respectively on a scale from 0-10). Well over half are in a ready-to-travel mindset (54.3%). In a measurement of "pent up demand," two-thirds of those whose typical travel patterns were altered by the pandemic say they miss traveling "very much," and now 22.2% of them say they are going to travel more in 2021 to make up for lost time--up from 18.6% last week. Meanwhile, 50.9% confirm they will return to their pre-pandemic levels of traveling. In the last week alone, 38.7% day-dreamt about leisure travel, 30.3% talked about travel with friends or relatives and 27.0% researched travel ideas online. This week, a record 43.7% of American travelers say that discounts can motivate them to take a trip they had not previously considered. Americans also continue to rate travel and leisure activities as safer than they ever have since the start of the pandemic.

AMERICANS' EXCITEMENT FOR TRAVEL

OPENNESS TO TRAVEL INSPIRATION MARCH 13, 2020 — JANUARY 24, 2021 OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE) 8.0 7.0 6.0 5.0 Waves 1-46 Question: At this moment, how interested are you in learning

about new, exiting travel experiences or destinations to visit?







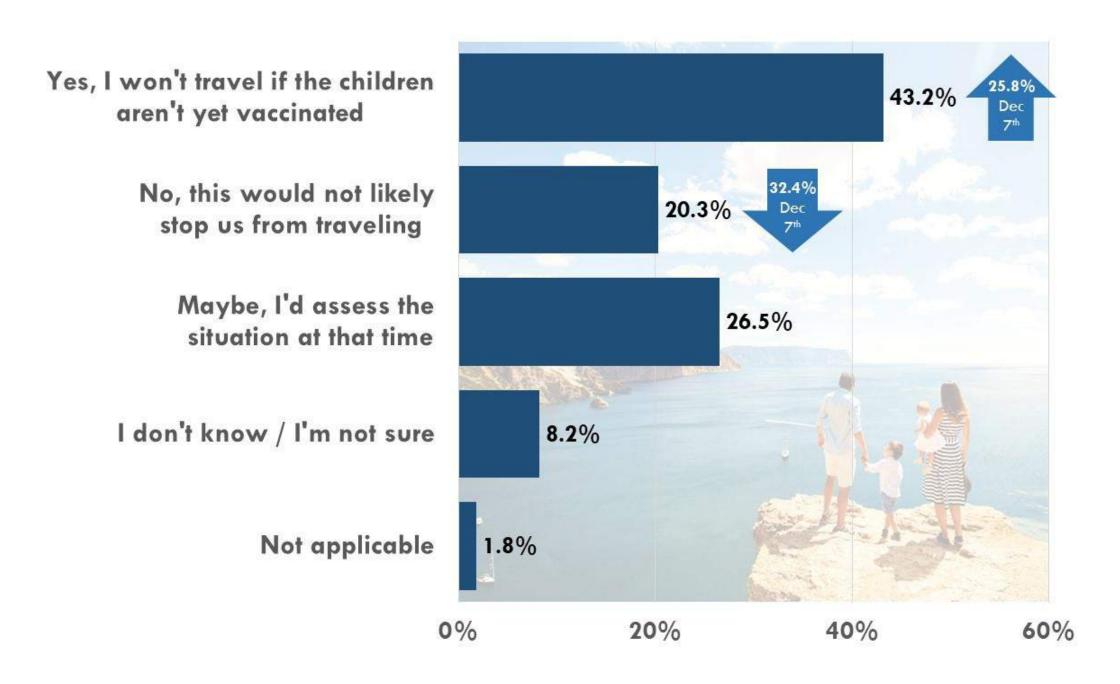
How Vaccine Distribution May Impact Travel

The availability and distribution of a COVID-19 vaccine remains a primary contributor to the growing optimism Americans are feeling about travel. Two-thirds say the vaccines are making them more optimistic about life returning to normal in the next six months and nearly 60% say they are making them more optimistic that they can travel safely within that same period. ore than a third now say they have begun planning or booking travel in anticipation of wider vaccine distribution. More American travelers than ever are saying they will get vaccinated against COVID-19. This week, 66.3% said they will take one of the available vaccines, and nearly one-third expects to be inoculated by the end of March.

Interestingly, this anticipation appears to make them more likely to say they will not be traveling until they get vaccinated (51.5%--up over 10% in the last 6 weeks) or distribution is wider (52.0%--up over 5% in the last 3 weeks). Given this, the pace of vaccine distribution will impact the timing of travel volume and trip types. For example, when parents of school-aged children were posed a scenario in which their own and other children had not been vaccinated by this summer, 43.2% of them said that they will NOT travel with the kids in this situation. This is up nearly 18 percentage points from when we last asked this question the week of December 7th (25.8%).

HOW VACCINE DISTRIBUTION MAY IMPACT FAMILY TRAVEL THIS SUMMER

AS OF JANUARY 24, 2021



Question: Please think about your family travels this summer. Imagine that by this summer COVID-19 vaccinations have been widely vaccinated. Your children have not yet been vaccinated.

Would this situation be likely to stop you from taking a family vacation this summer? (select one that best describes you)

(Base: Wave 46 data. Respondents with school-aged children, 389 completed surveys. Data collected January 22-24, 2021)



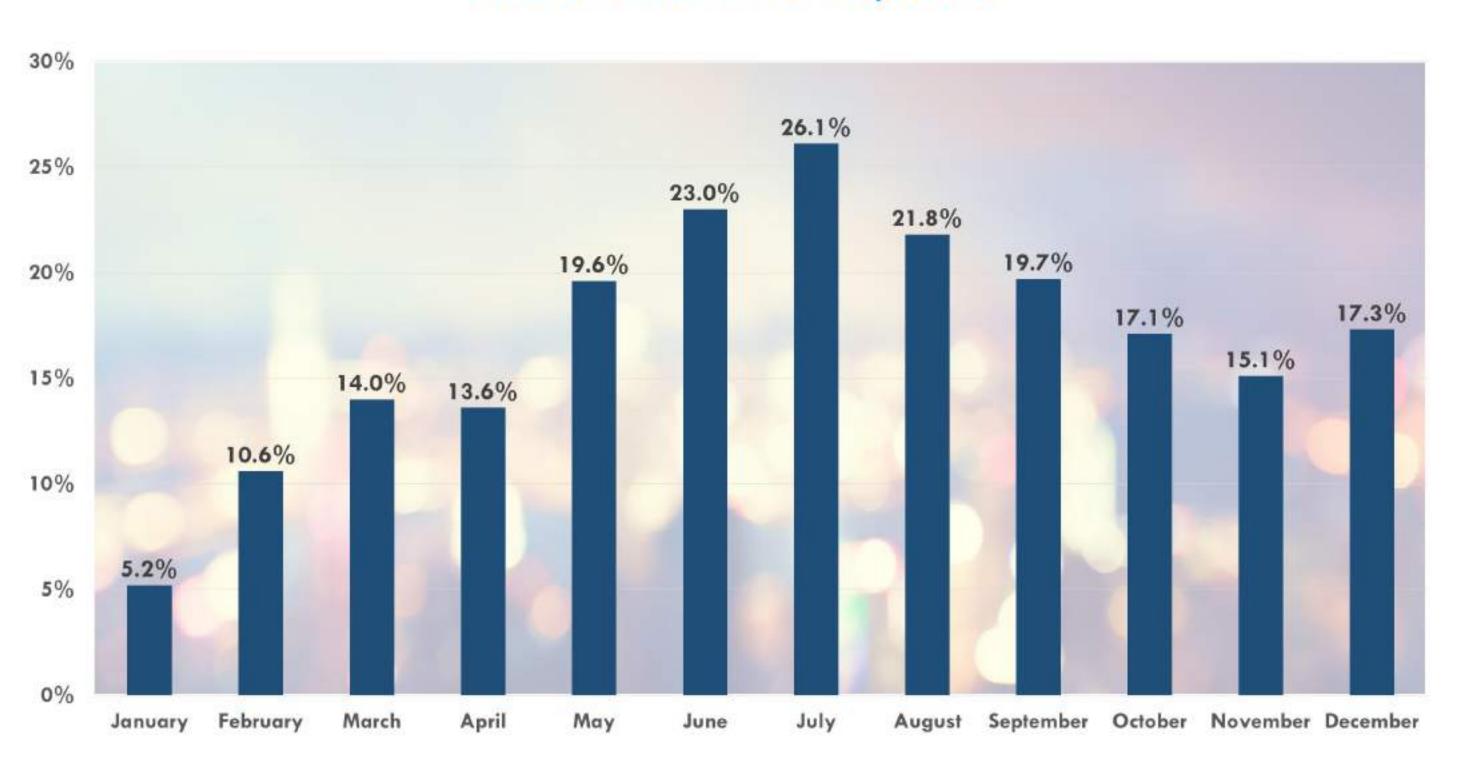
Month of Expected Leisure Trips in 2021

You can see vaccine expectations and how Americans envision the year in their current travel plans.

As shown in the chart at right, the percent of Americans with leisure trips planned begins to jump up in May. Right now, 26.1% of American travelers say they already have plans to travel in July. Over the next three months, travel looks like it will be relatively muted compared to the rest of the year, although approximately 47% of American travelers anticipate taking a trip in the next 12 weeks. Nearly 75% of these trips are expected to be within 250 miles of these travelers' residences.

MONTHS OF EXPECTED LEISURE TRIPS IN 2021

AS OF JANUARY 24, 2021



Question: Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (select all that apply)

(Base: Wave 46 data. All respondents, 1,206 completed surveys. Data collected January 22-24, 2021)

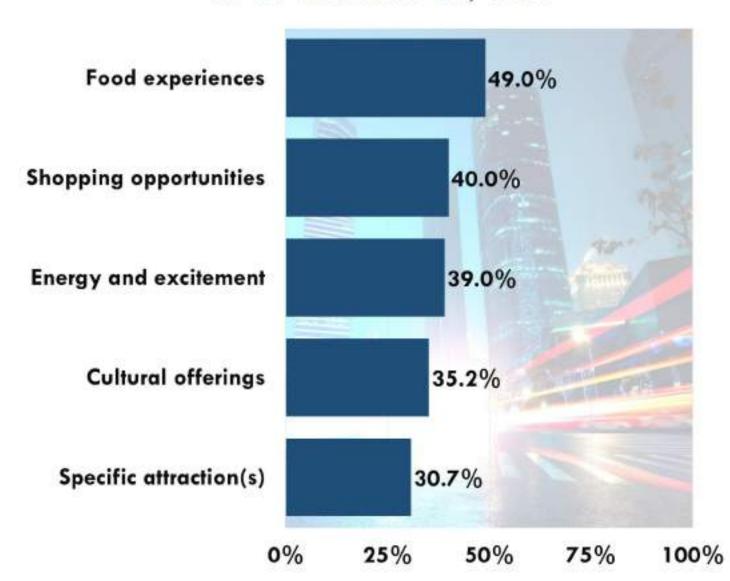


Top Reasons for Travel for Urban and Rural Destinations

In gauging Americans march "back to normal," we continue to see signs of urban destinations recovering. New York, Las Vegas and Los Angeles comprise 3 of the top 5 places Americans say they want to visit this year. However, it appears that rural areas will continue to be strong competitors to cities in a way not seen before the pandemic. Those traveling over the next three months are as likely (even slightly more so) to go to small towns and rural areas (38.7%) as cities and metropolitan areas (36.3%), and while 32.6% of American travelers say their travel preferences favor visiting cities, 29.7% say their preference is for rural. The pandemic remains a driver of this—56.3% of those that say they prefer rural destinations say COVID-related safety concerns are an important factor to their preference. Other top reasons those with rural preference orient to these destinations include peace and quiet, scenic beauty, escaping from crowds, relaxing atmosphere and these destinations' charm and ambiance. Meanwhile, those with an urban preference want the food, shopping, cultural offerings, attractions and energy and excitement offered.

TOP 5 REASONS FOR URBAN TRAVEL PREFERENCE

AS OF JANUARY 24, 2021

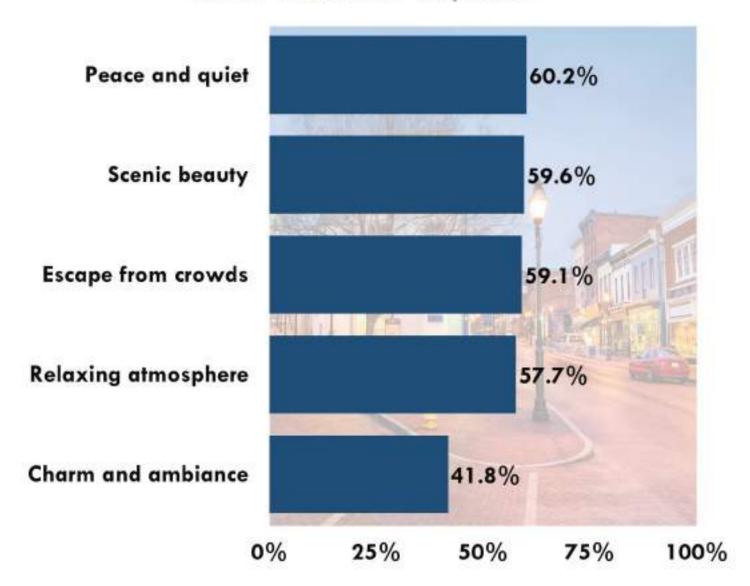


Question: Which of the following are reasons you prefer large cities? (Select all that apply)

(Base: Wave 46 data. Respondents who prefer city destinations, 358 completed surveys. Data collected January 22-24, 2021)

TOP 5 REASONS FOR RURAL TRAVEL PREFERENCE

AS OF JANUARY 24, 2021



Question: Which of the following are reasons you prefer small towns or rural destinations? (Select all that apply)

(Base: Wave 46 data. Respondents who prefer small towns or rural destinations, 358 completed surveys. Data collected January 22-24, 2021)



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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.

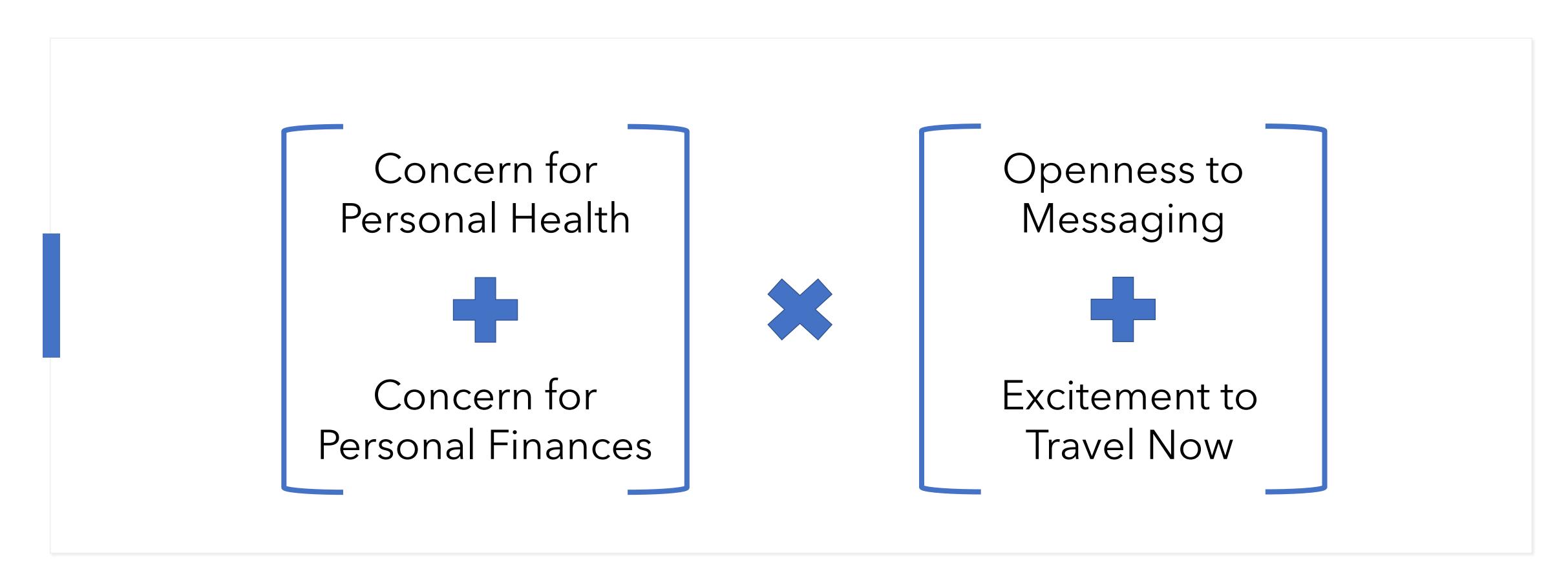


The goals are to identify:

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



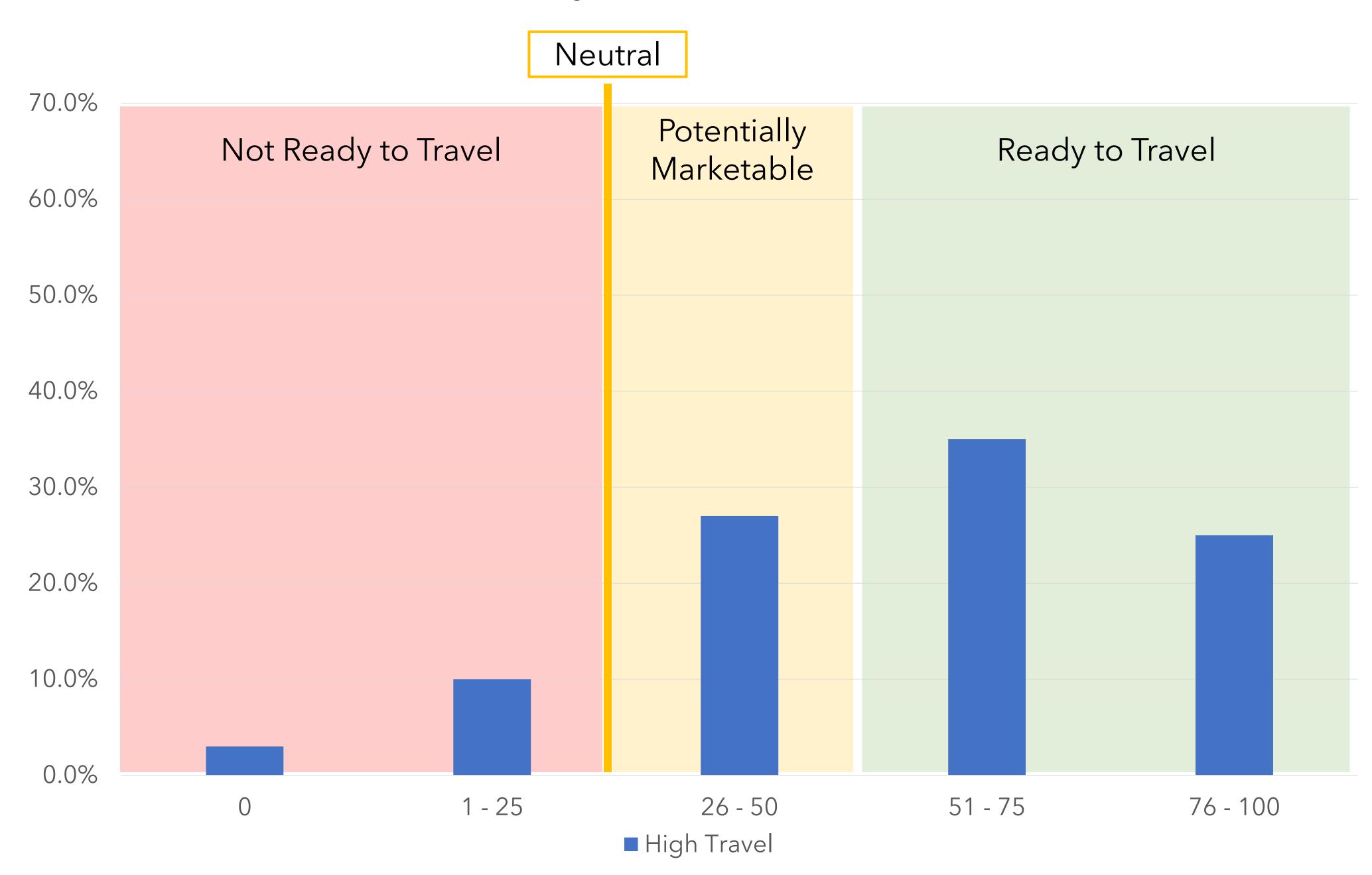
Predictive Index Formula



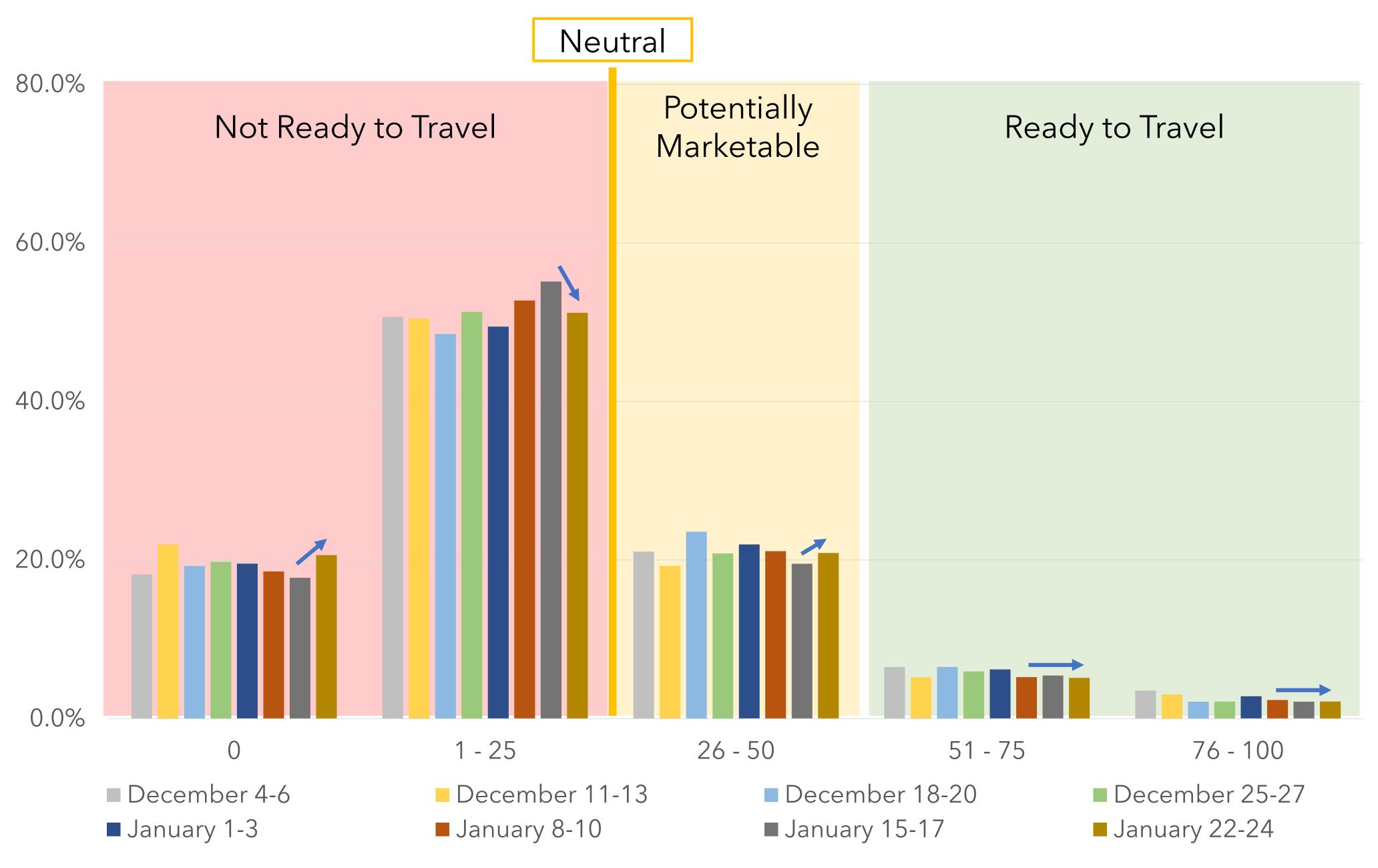
*Normalized to a 100pt scale

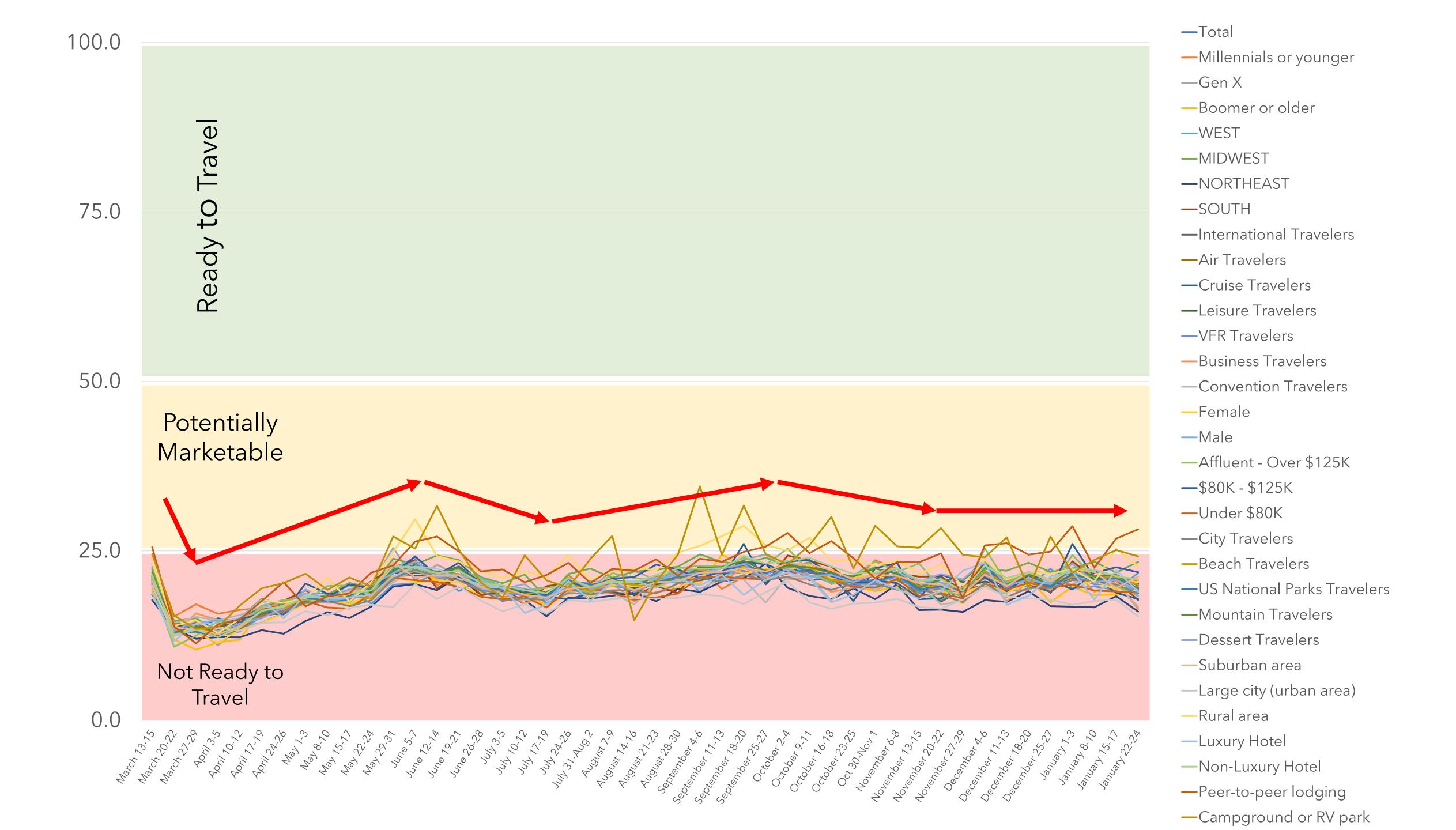


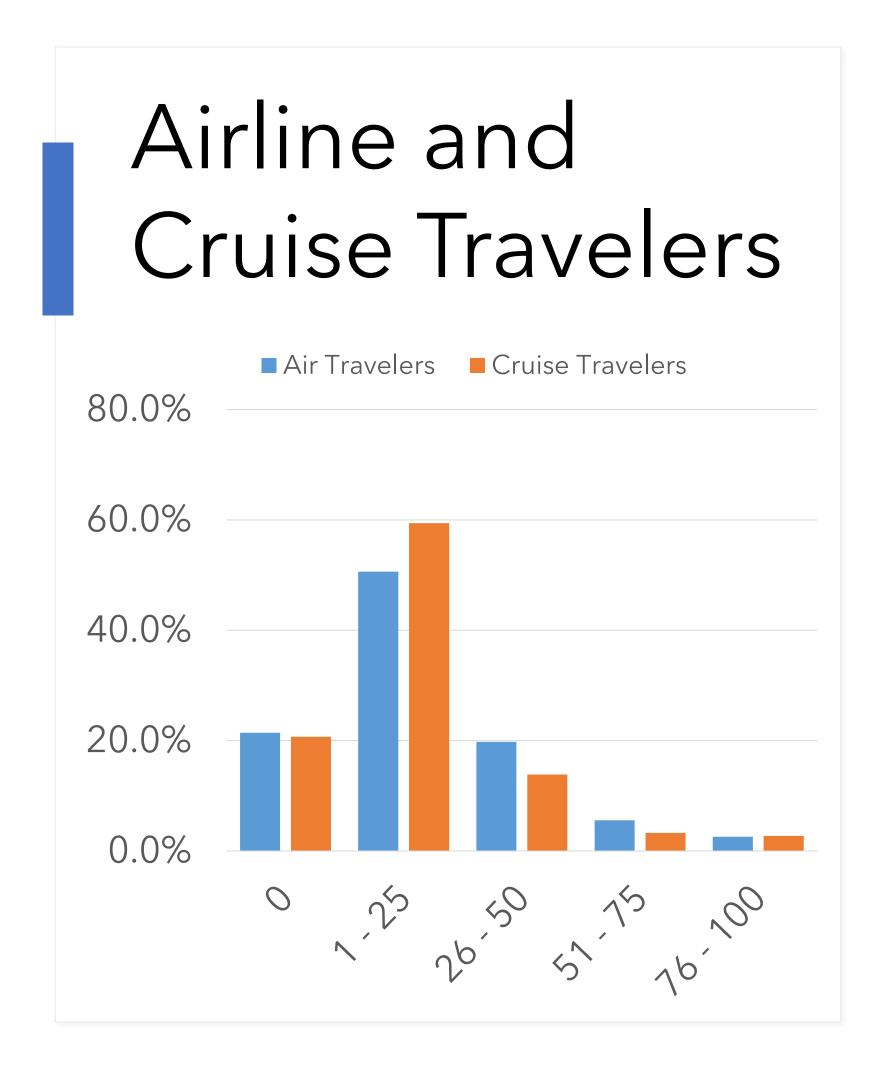
Healthy Travel Outlook

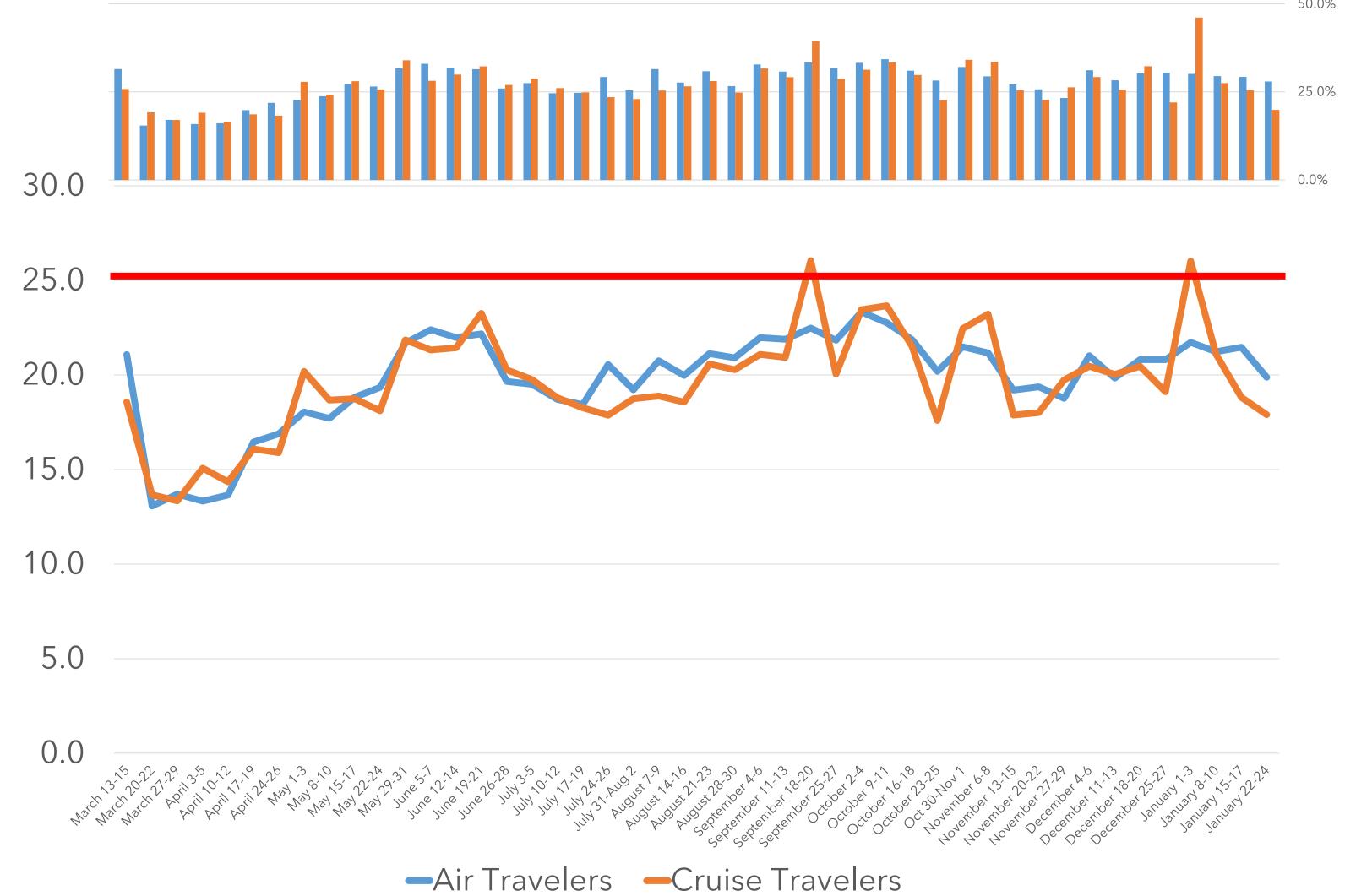


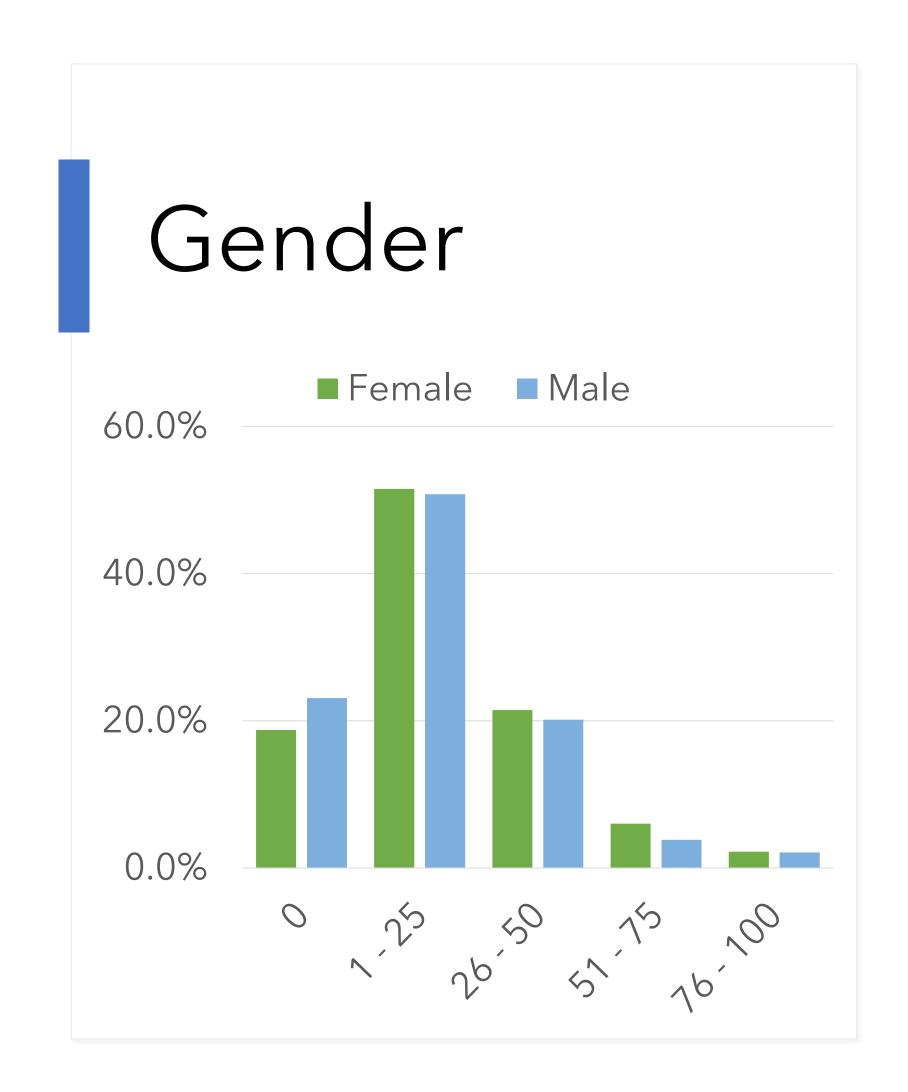
Travel Outlook

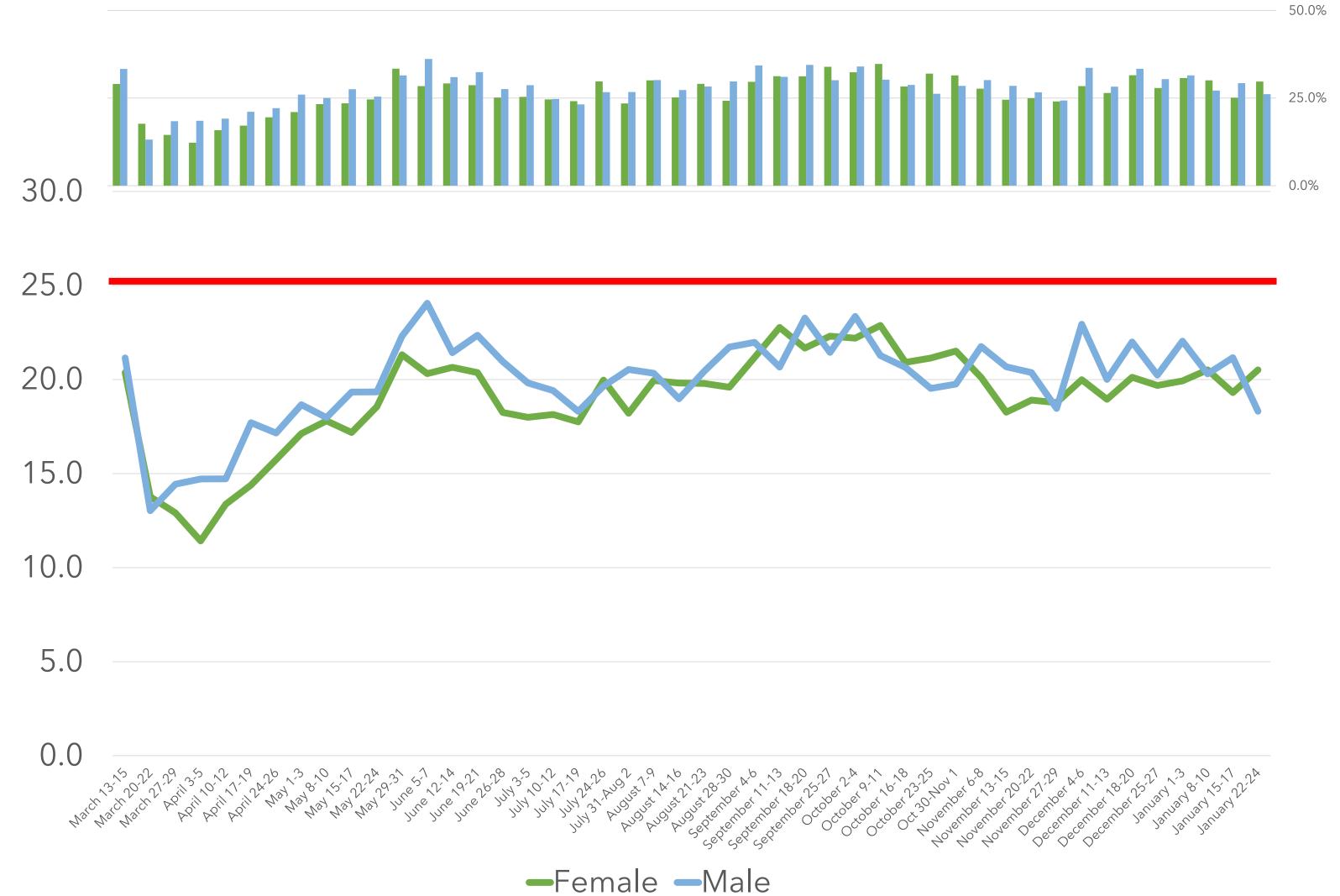


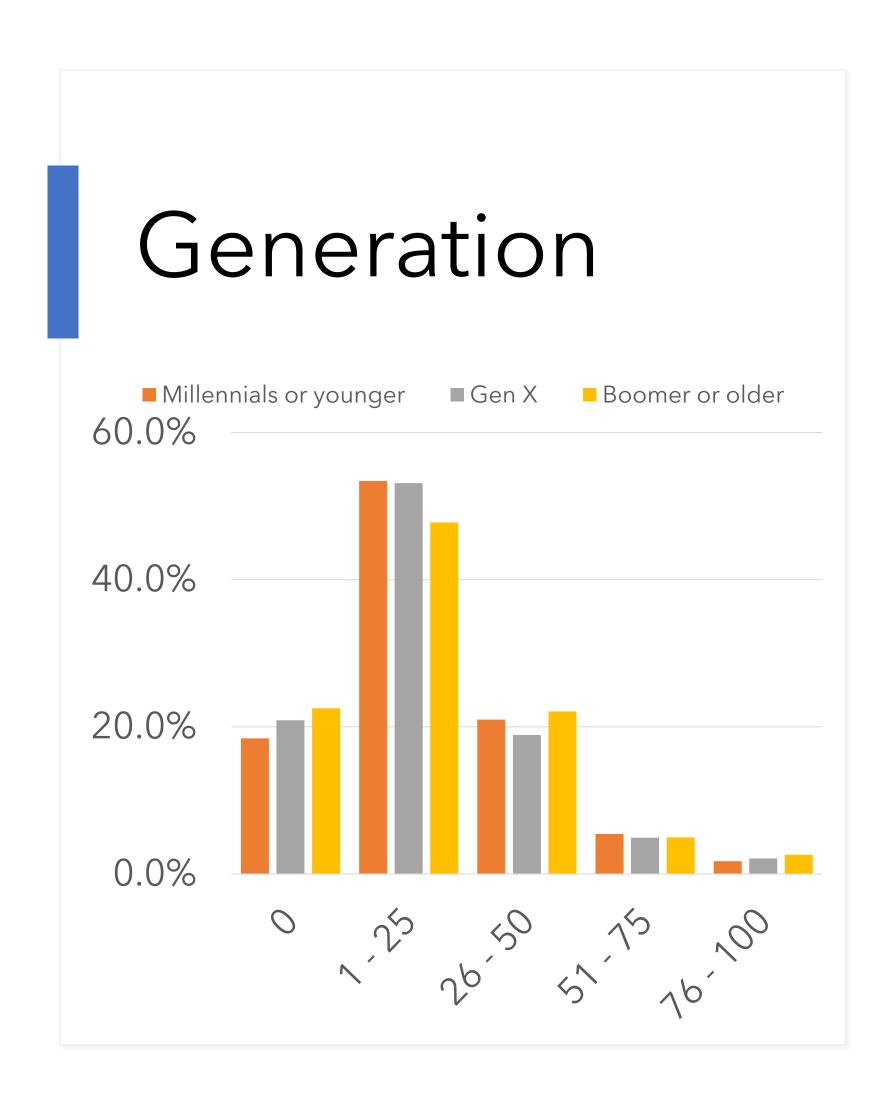


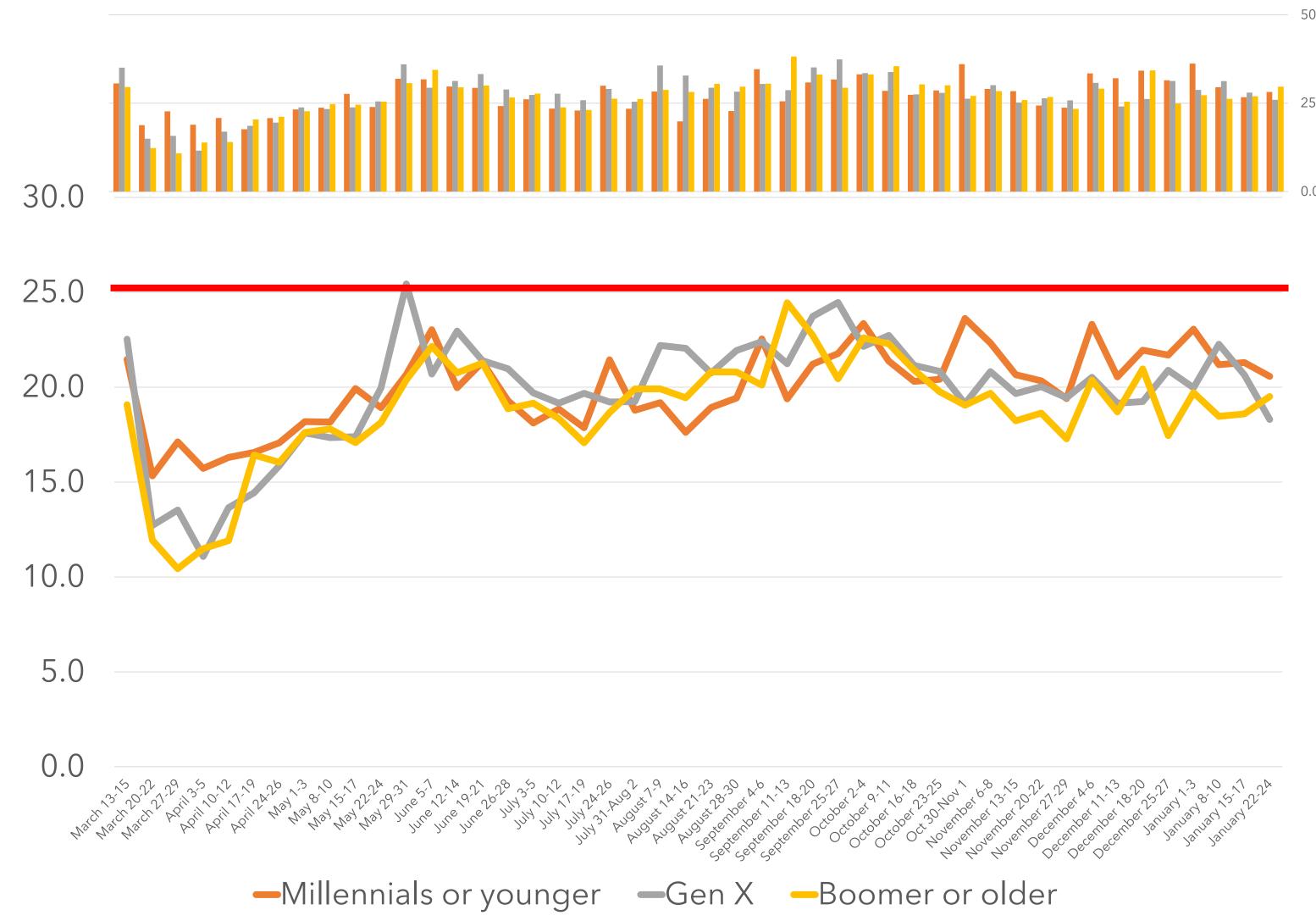


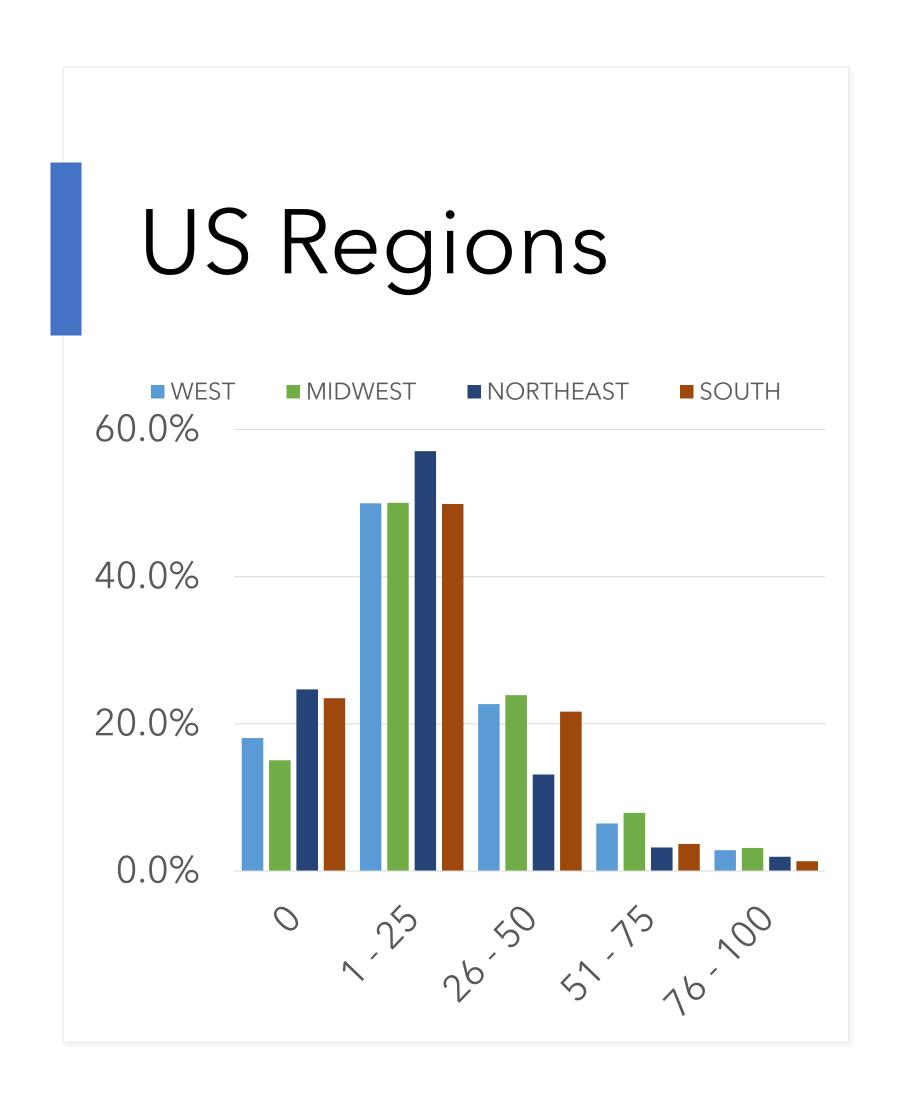


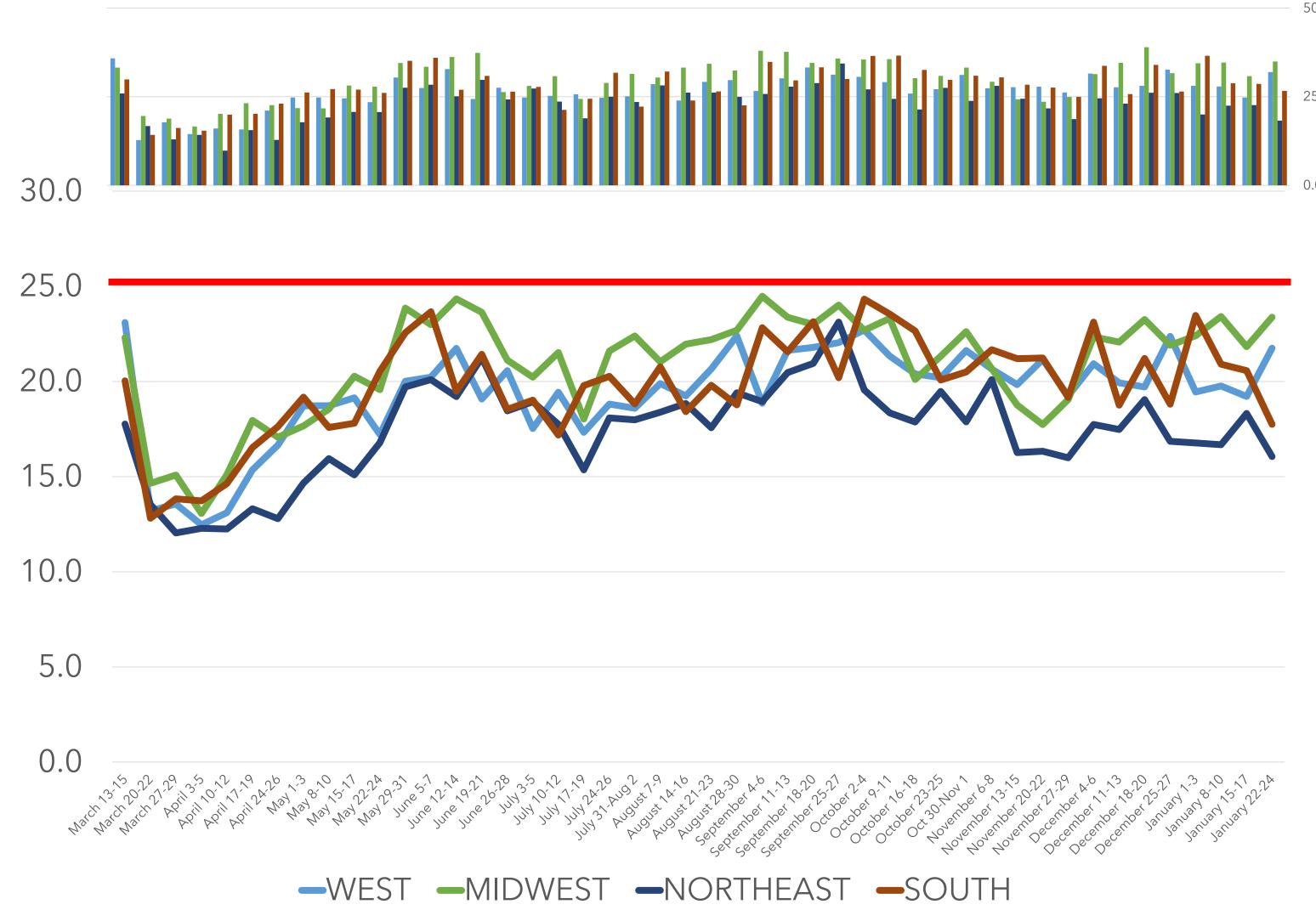


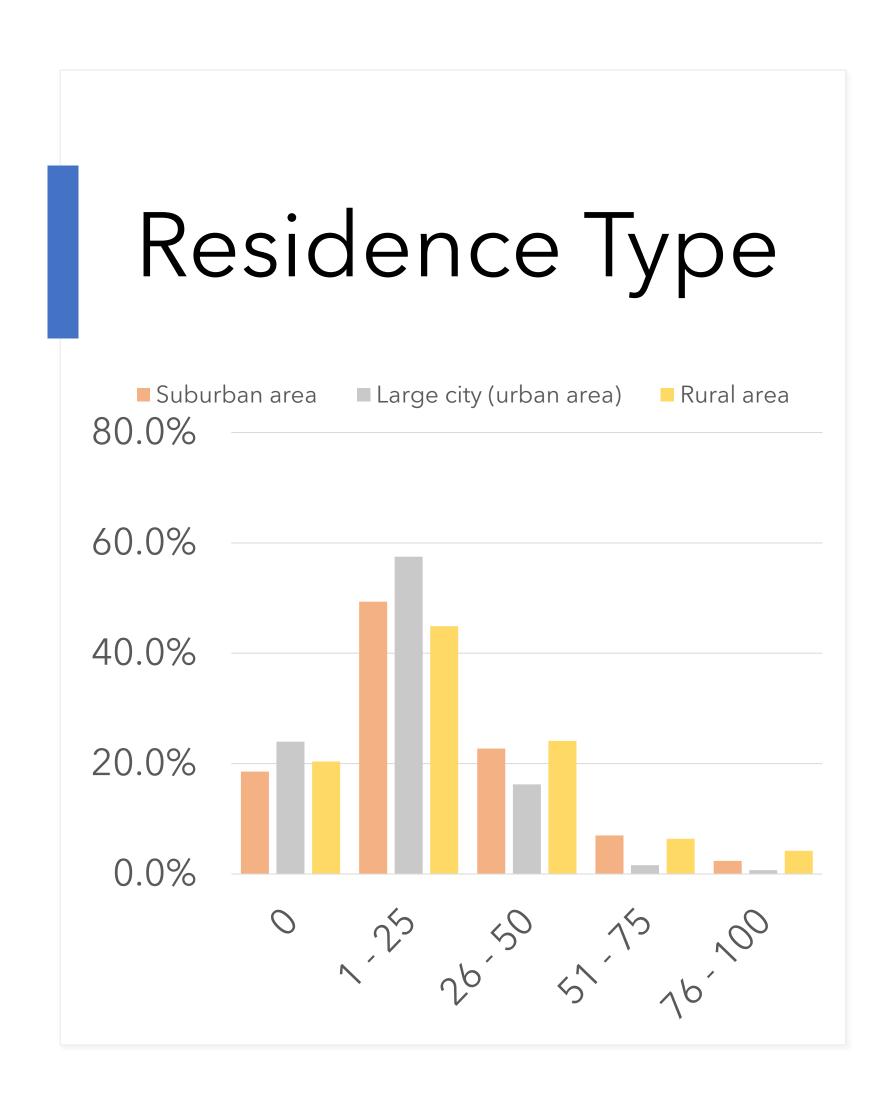


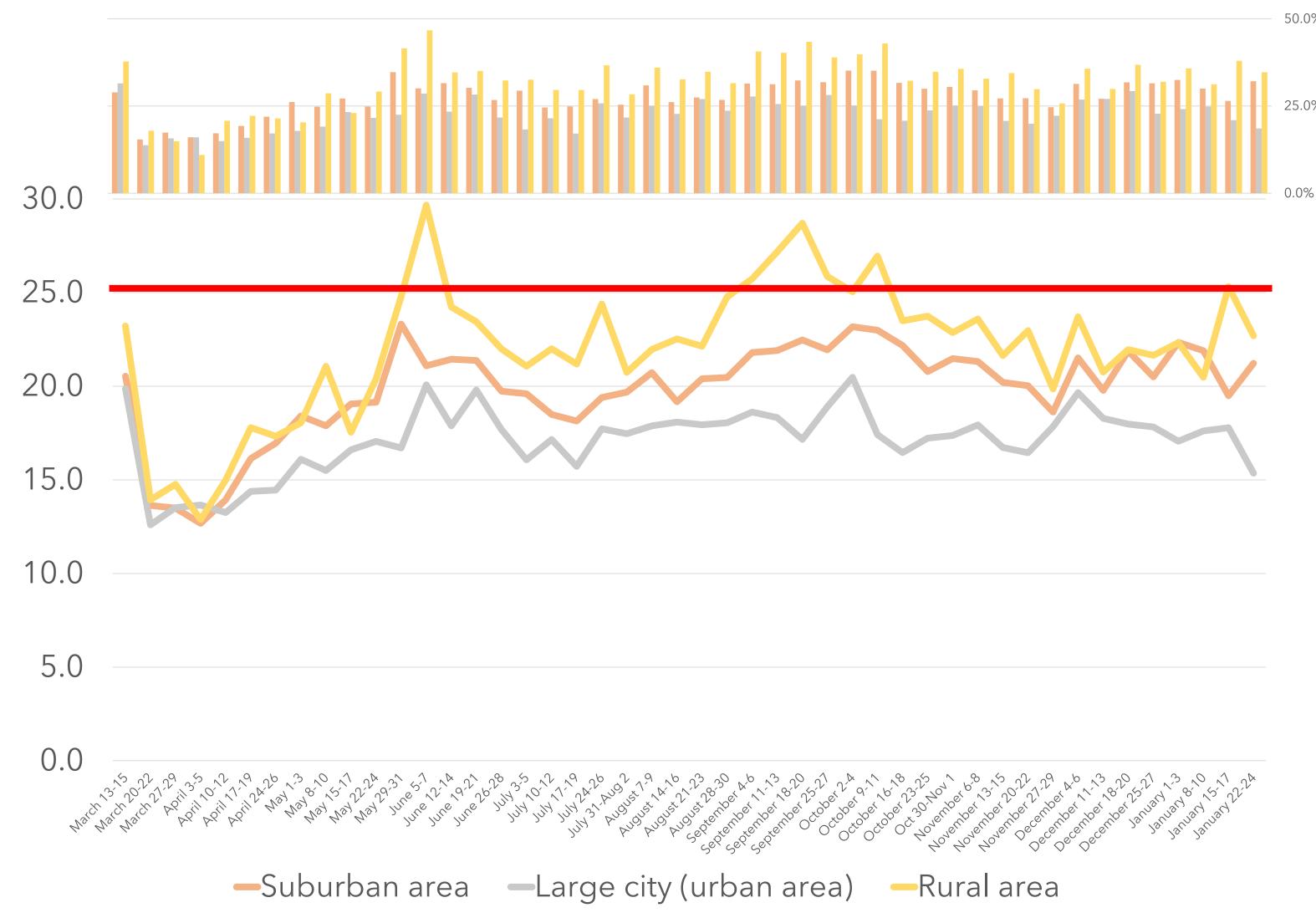


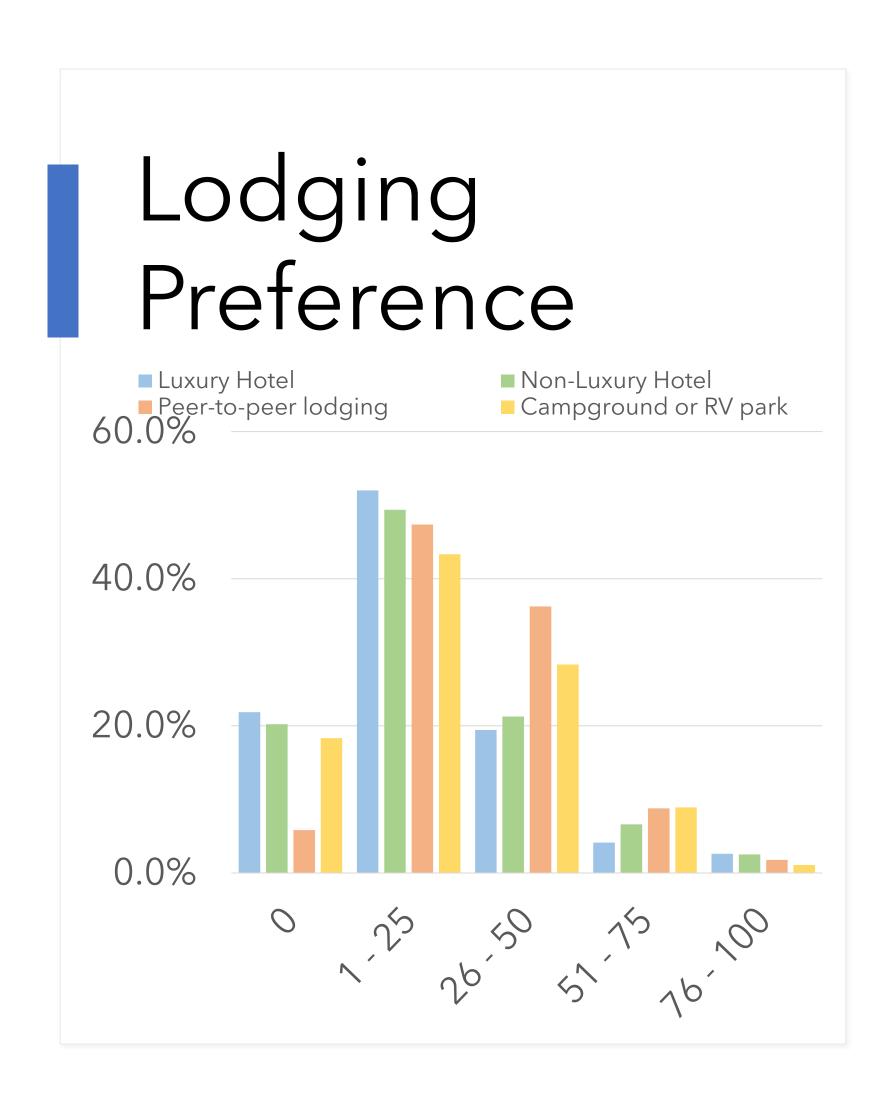


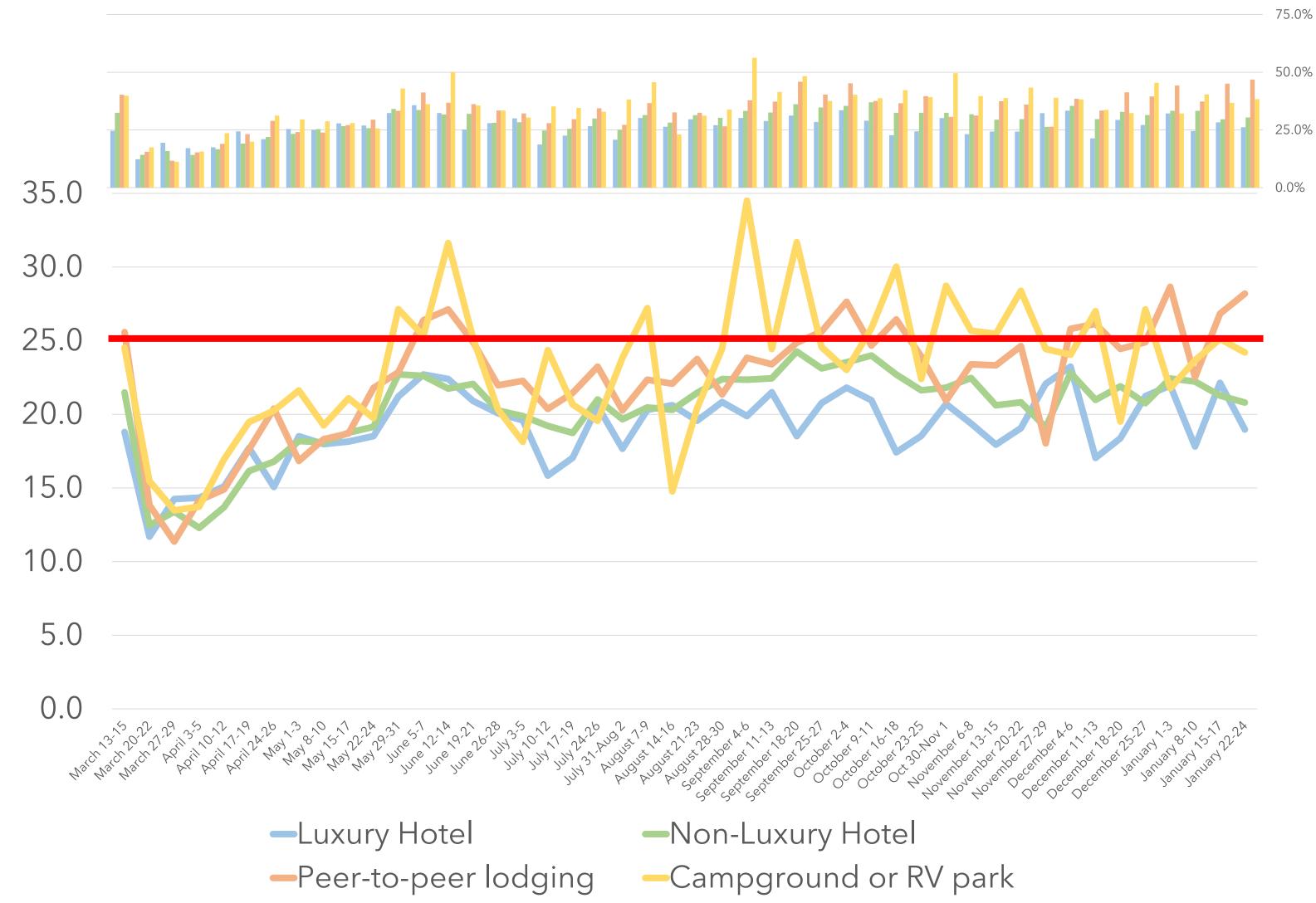














Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

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





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