TRAWEL SENTIMENT KEY FINDINGS—WEEK OF FEBRUARY 22nd, 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.

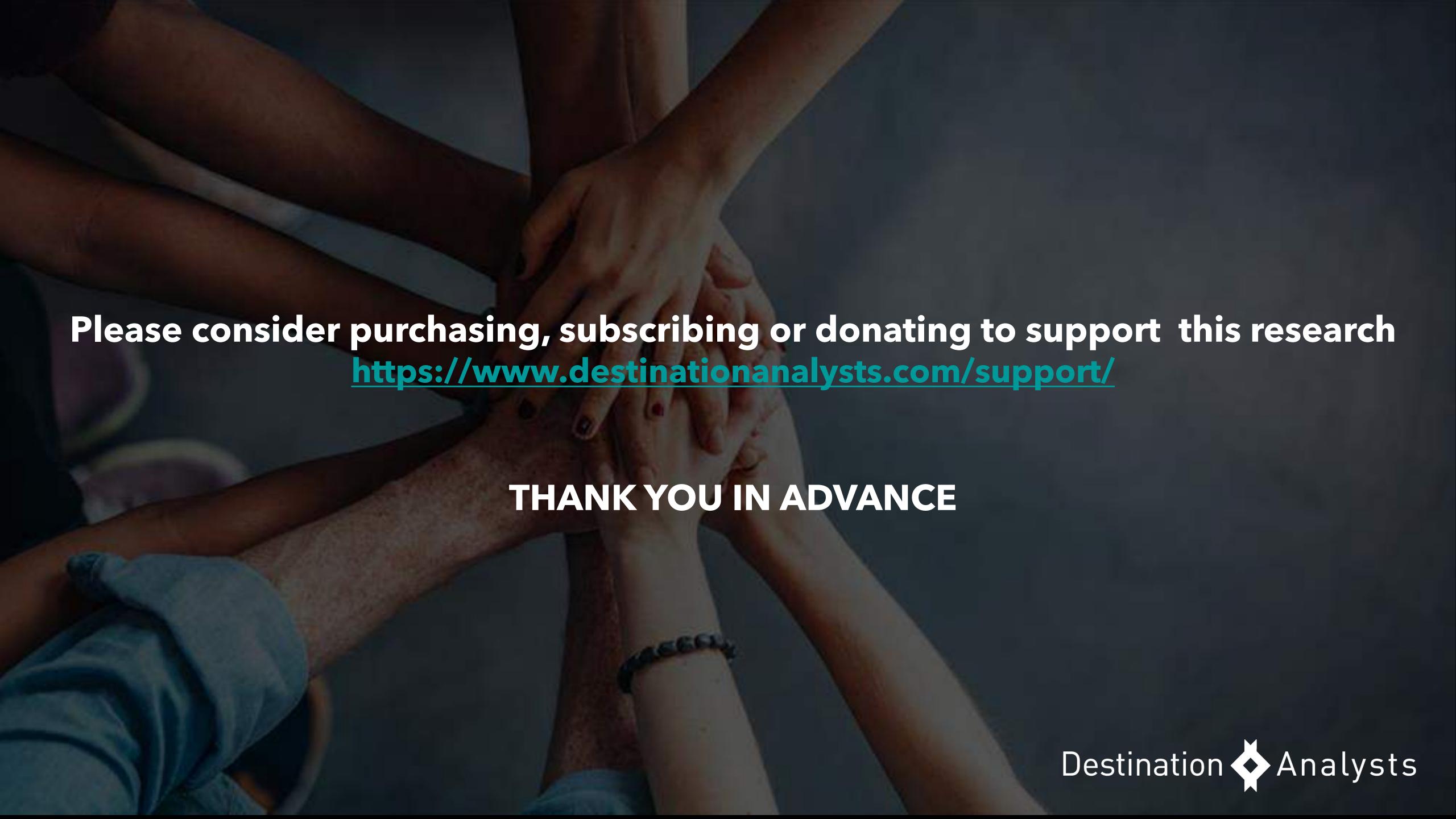
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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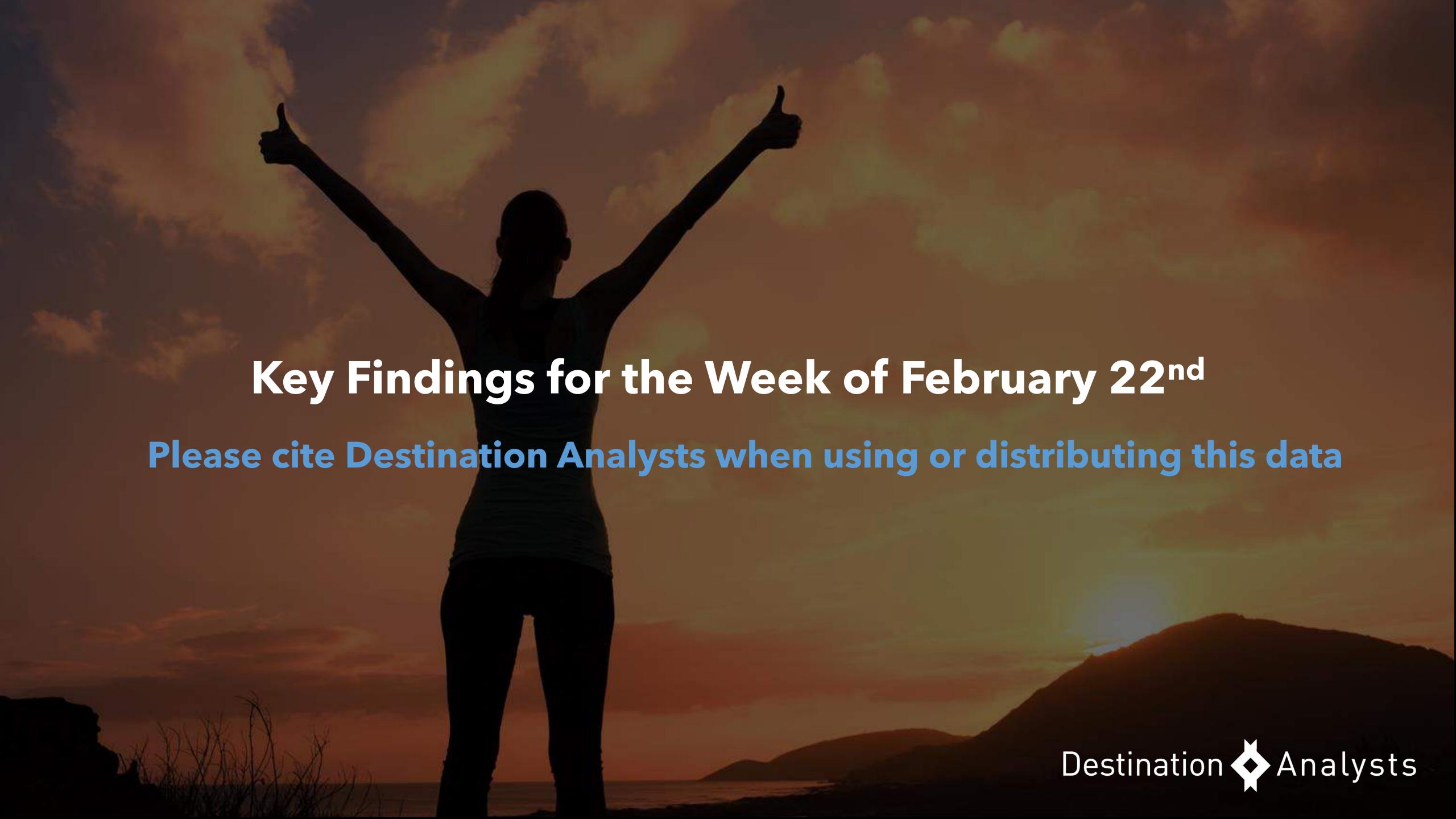
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This week's travel insights update will be followed by an in-depth discussion with attractions industry professionals to learn how their respective attractions plan to adapt as the year progresses.

Sign up to attend the webinar on Tuesday, February 23rd at 11:00am ET here.



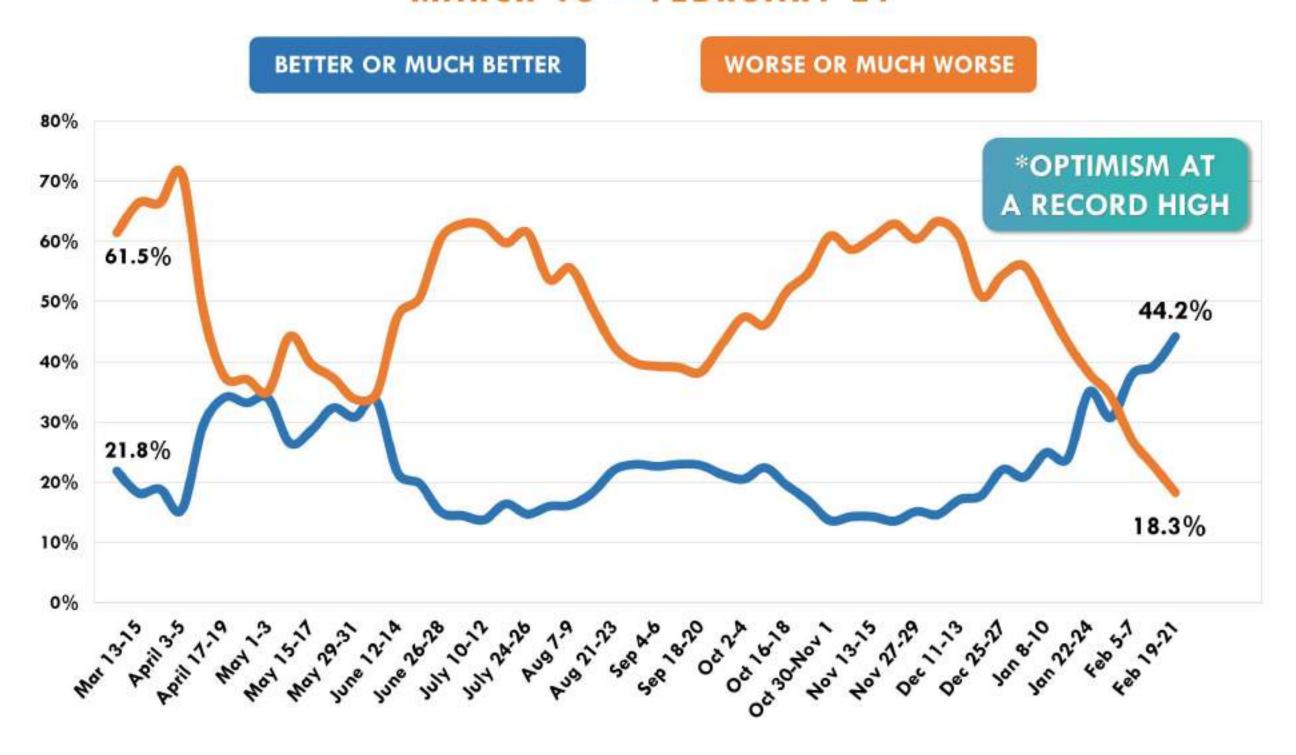
Expectations for the Coronavirus Situation

As COVID-19 hospitalizations continue to decline after their January peak, Americans' optimism about the month ahead soared an additional 5 percentage points in the last week, reaching another record high.

Now 44.2% feel the pandemic situation in the United States will improve over the next four weeks. Meanwhile, just 18.3% (a record low) feel the pandemic will get worse, after topping 55% at the start of the year.

IN THE U.S OVER THE NEXT MONTH

MARCH 13 - FEBRUARY 21



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 1-50. 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, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,206, 1,206, 1,206, 1,206, 1,206, 1,206, 1,206, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,216 and 1,210 completed surveys.)



Americans' Perceptions of Travel

As we've seen throughout the highs and lows of the last 11 months, when Americans are feeling less anxious and more hopeful about the pandemic, this is translated into their perceptions of travel.

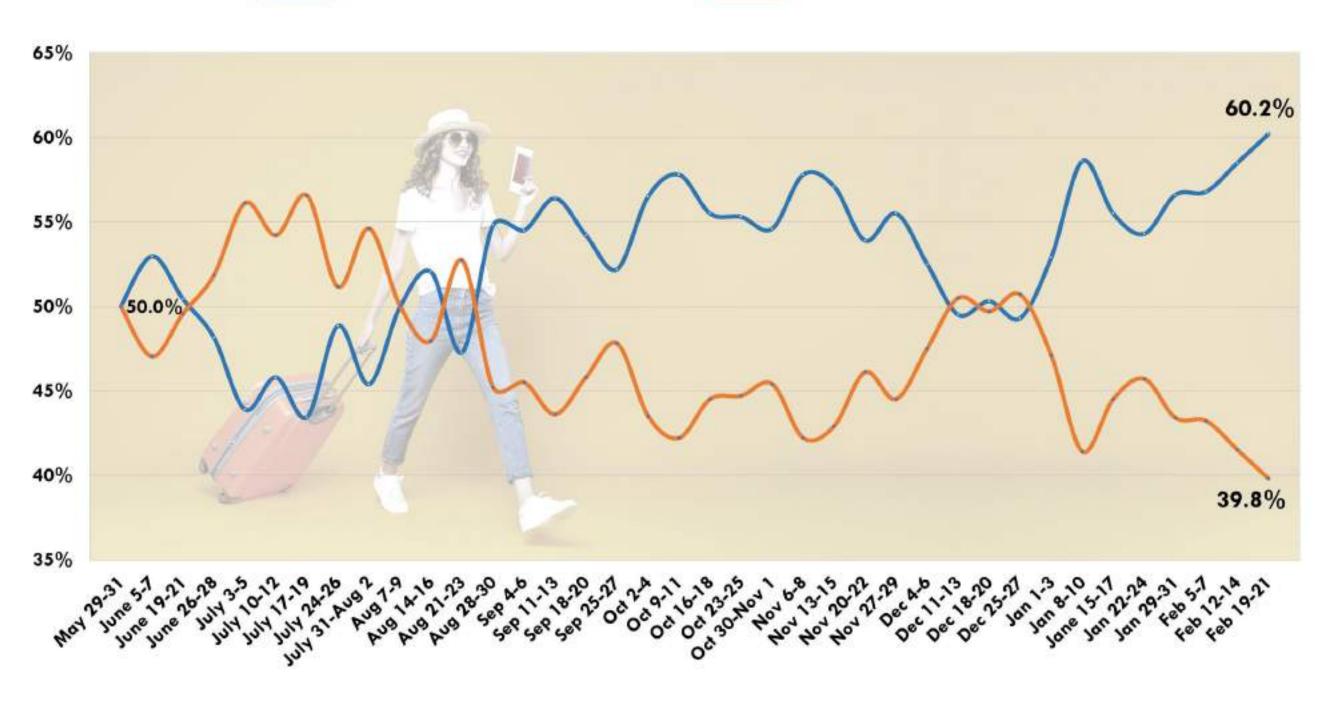
In addition to optimism about the next month, other record highs in travel sentiment reached this week include: the level of excitement about travel in 2021 (6.2/10), a readiness state-of-mind around travel (60.2%), those who have received or know friends or relatives who have received the vaccine (62.7%), the making of travel plans specifically in anticipation of vaccine distribution (34.8%) and the proportion who will take at least one leisure trip in the next 3 months (52.9%). Welcome record lows noted this week include: perceptions of travel and leisure activities as unsafe (45.7%), strong concern about the virus' impact on personal finances (52.2%), general avoidance of travel (45.3%), avoidance of conferences and conventions (63.2%), agreement that travel should be for essential needs only (48.7%), travel guilt (42.7%), and refusal to travel until vaccines are widely available (46.5%). Also of significance: Americans' support of travel in their own communities reached important milestones in the recovery. Anticipated happiness with ads promoting their community for tourism reached another high (41.9%), while agreement that tourists in their community are unwanted reached a record low (48.3%).

AMERICANS' TRAVEL STATE-OF-MIND

MAY 29, 2020 - FEBRUARY 21, 2021







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 15-50. 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, 1,200, 1,205, 1,203, 1,203, 1,204, 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, 1,216 and 1,210 completed surveys.)



How Americans Feel About Travel Right Now

Fortunately, the focus of the rapidly improving sentiment around travel is not just on its safety and accessibility, but true enthusiasm.

When asked to use just one word to describe how they feel about travel right now, "excited" is what Americans largely cite. This feeling has become even more predominant since the start of the year and is in stark contrast to earlier periods of the pandemic in which fear and caution prevailed.

THE ONE WORD THAT DESCRIBES HOW AMERICANS FEEL ABOUT TRAVEL RIGHT NOW AS OF FEBRUARY 21, 2021



Question: What one word best describes how you feel about travel right now?



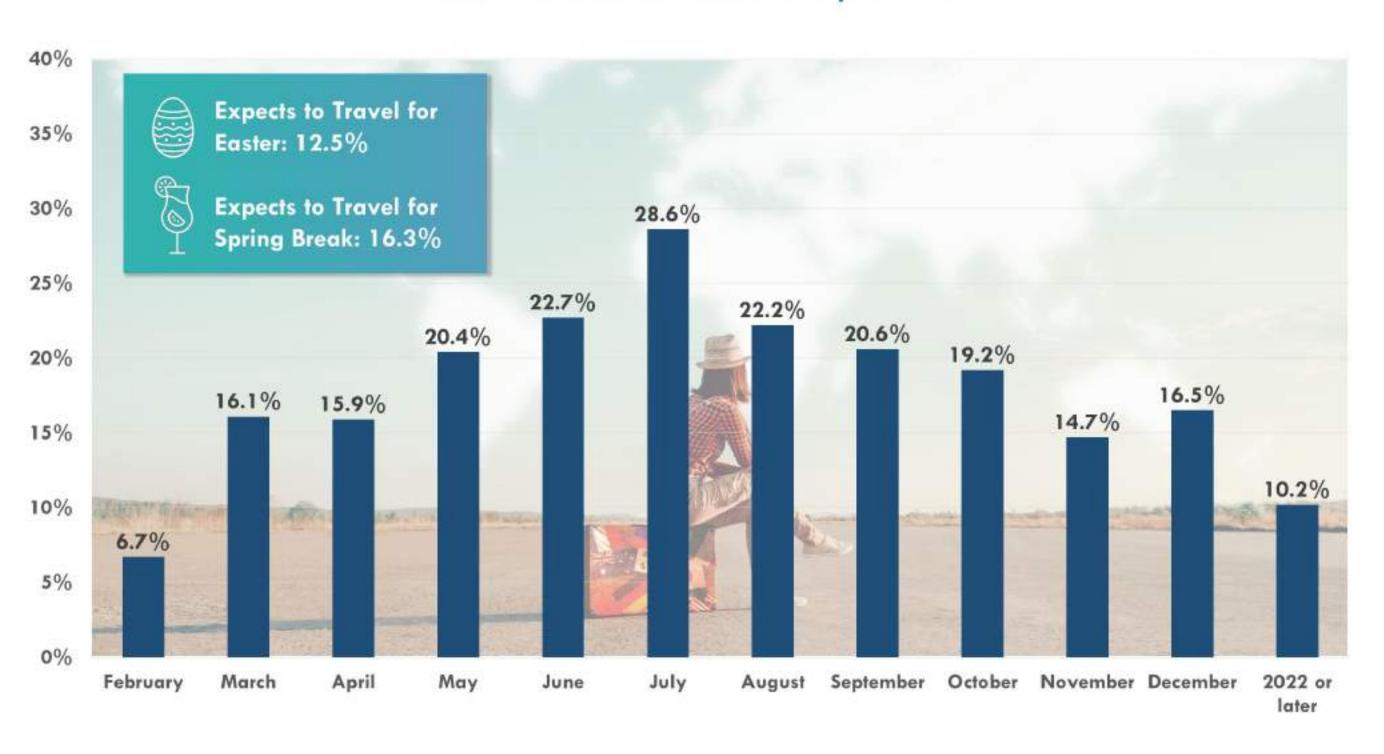
Expected Timing of Leisure Trips in 2021

And as demonstrated time and time again, feelings translate to actions. An incredible 83.5% of American travelers have at least tentative trip plans right now.

The majority of Americans continue to believe they will be vaccinated from COVID-19 by this summer, which we see reflected in the timing of their trip plans, including a notable spike in July and consistency in the months following. And as each week more Americans have been vaccinated as well as know others who have, more trips in the short term appear. The proportions with trips planned for April and May have inched up over the last month (including for Easter and Spring Break). Well over half of American travelers will take a leisure trip within the next 3 months, averaging 1.1 trips.

EXPECTED TIMING OF LEISURE TRIPS IN 2021

AS OF FEBRUARY 21, 2021



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

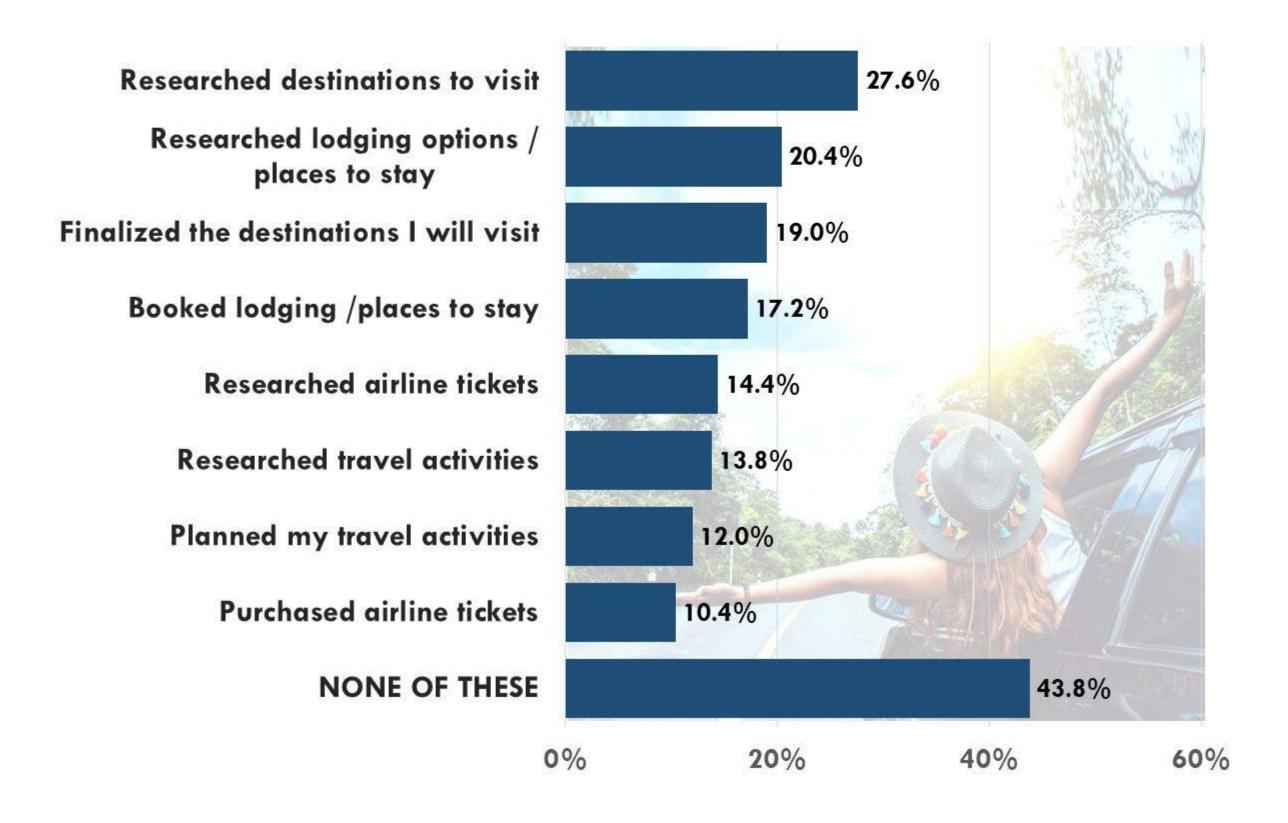


Travel Planning Tasks Already Completed For Americans' Next Leisure Trip

With two-thirds having travel dreamt and planned in just the last week alone, Americans remain highly open to travel inspiration (6.0/10) and the potential influence of travel advertising.

56.2% have not yet taken any significant action towards planning their next leisure trips, and thus could potentially be swayed on decisions from the destination to visit to their trip activities. Even half of those who will be taking a trip within the next 3 months say that their trip isn't well developed yet. Among the 12.3% who made travel reservations in the last week, hotels were far and away the most commonplace, with over half of these travelers saying they booked a room.

THE TRAVEL PLANNING TASKS ALREADY COMPLETED FOR AMERICANS' NEXT LEISURE TRIP AS OF FEBRUARY 21, 2021



Question: For this next leisure trip, which of these planning tasks have you completed? (Select all that apply)



When Americans Will Feel Comfortable at Public Outdoor Attractions & Events

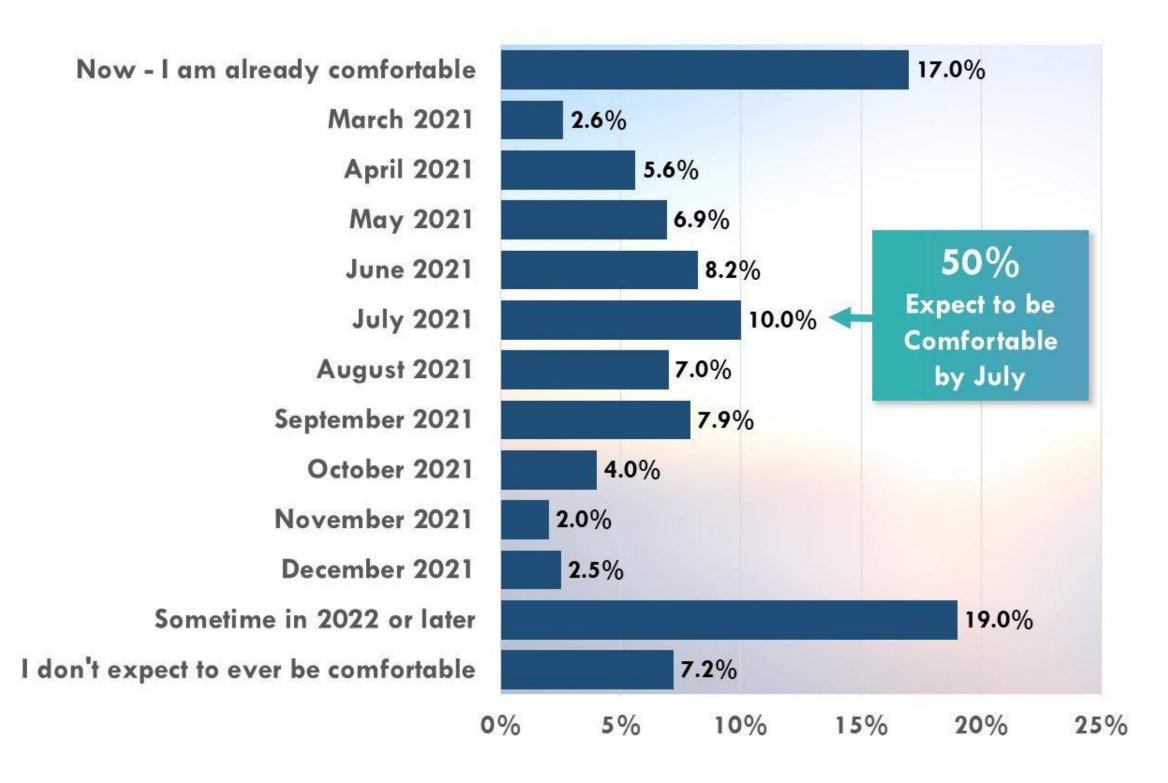
As we march back to normalcy, and with summer looking especially promising, what might the outlook be for public and commercial outdoor attractions and events? Interest in these types of attractions and events is certainly present, from National Parks attractions (53.8%) to outdoor concerts (31.1%).

Half of American travelers expect to be comfortable at commercial outdoor venues and attractions by July.

Among the most popular safety protocols Americans desire at these places are many hand sanitizing stations situated throughout, visible cleaning activity during operating hours and mask requirements for guests and staff.

WHEN AMERICANS WILL FEEL COMFORTABLE AT PUBLIC OUTDOOR ATTRACTIONS & EVENTS

AS OF FEBRUARY 21, 2021



Question: Thinking about the future, when do you expect you will feel comfortable visiting a commercial outdoor attraction(s) (e.g., zoos, amusement parks, theme parks, festivals, concerts, sporting events, etc.)?

(Select the first month you think you will start to be comfortable)

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Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing Highlights from the Week of February 22nd



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.

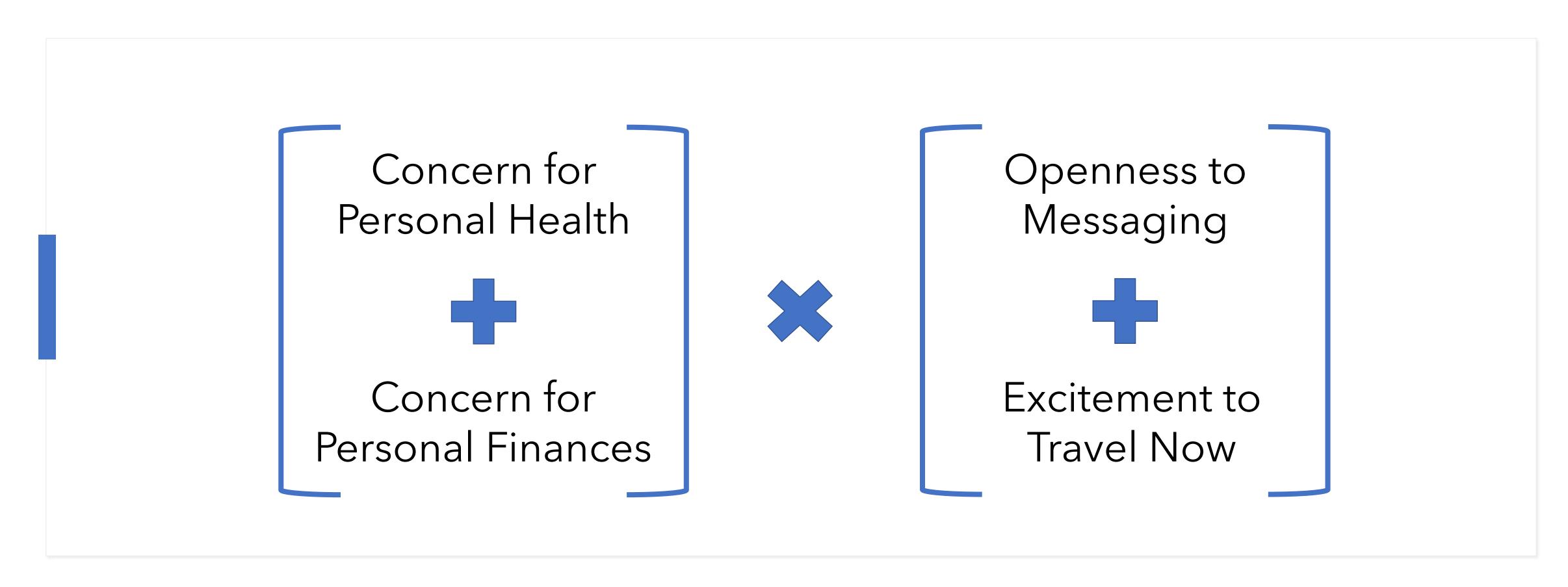


The goals are to identify:

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



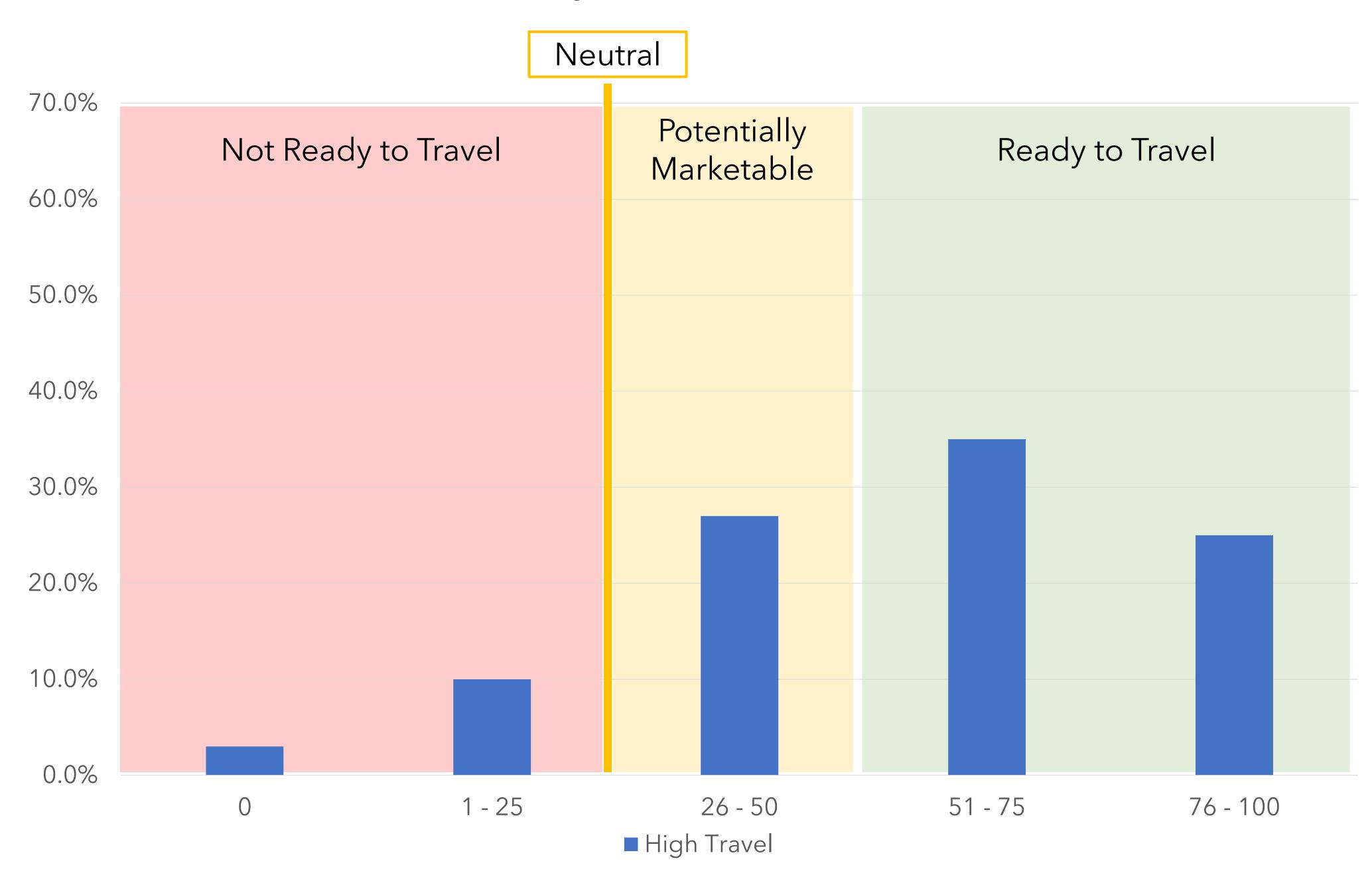
Predictive Index Formula



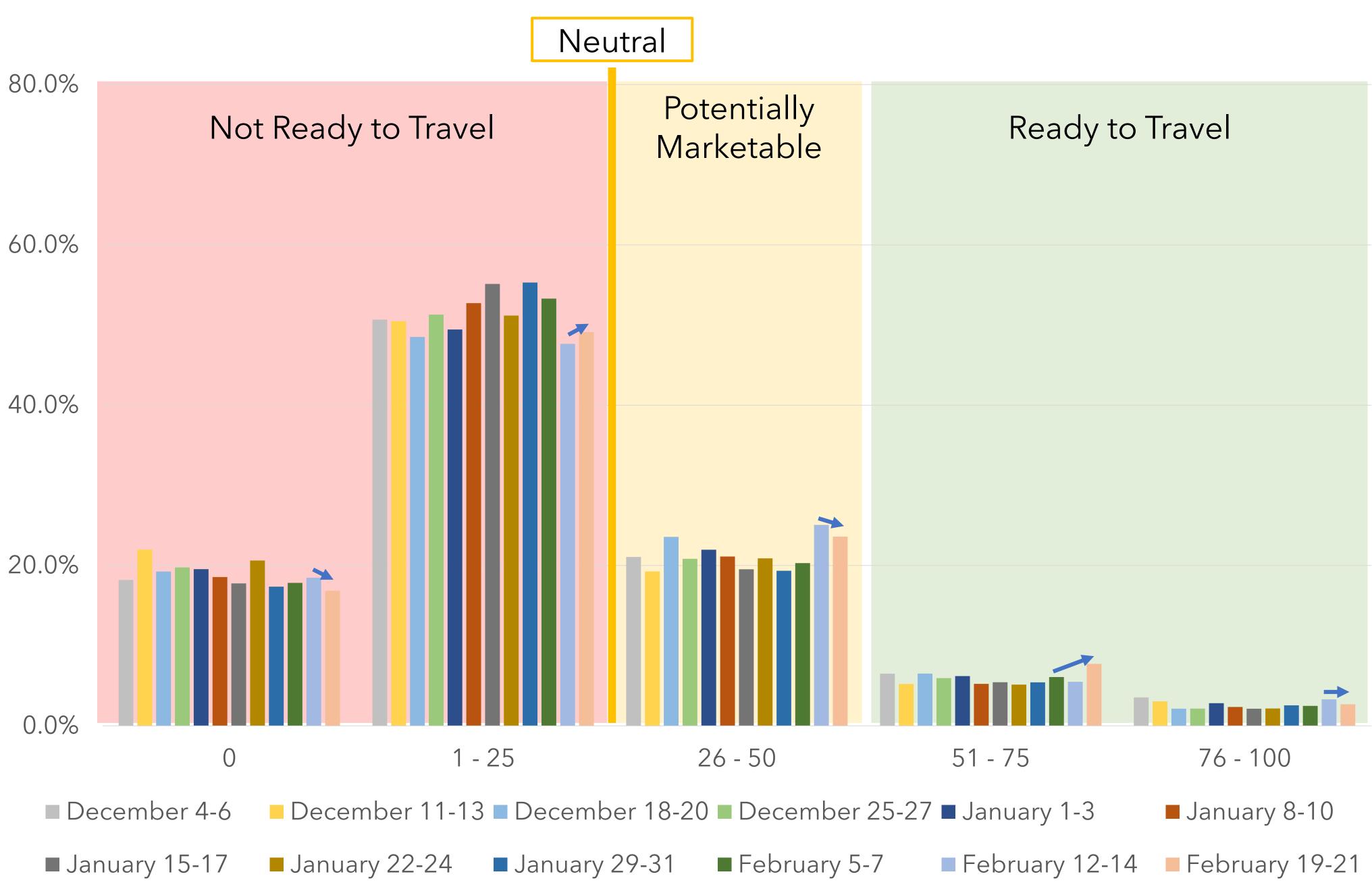
*Normalized to a 100pt scale

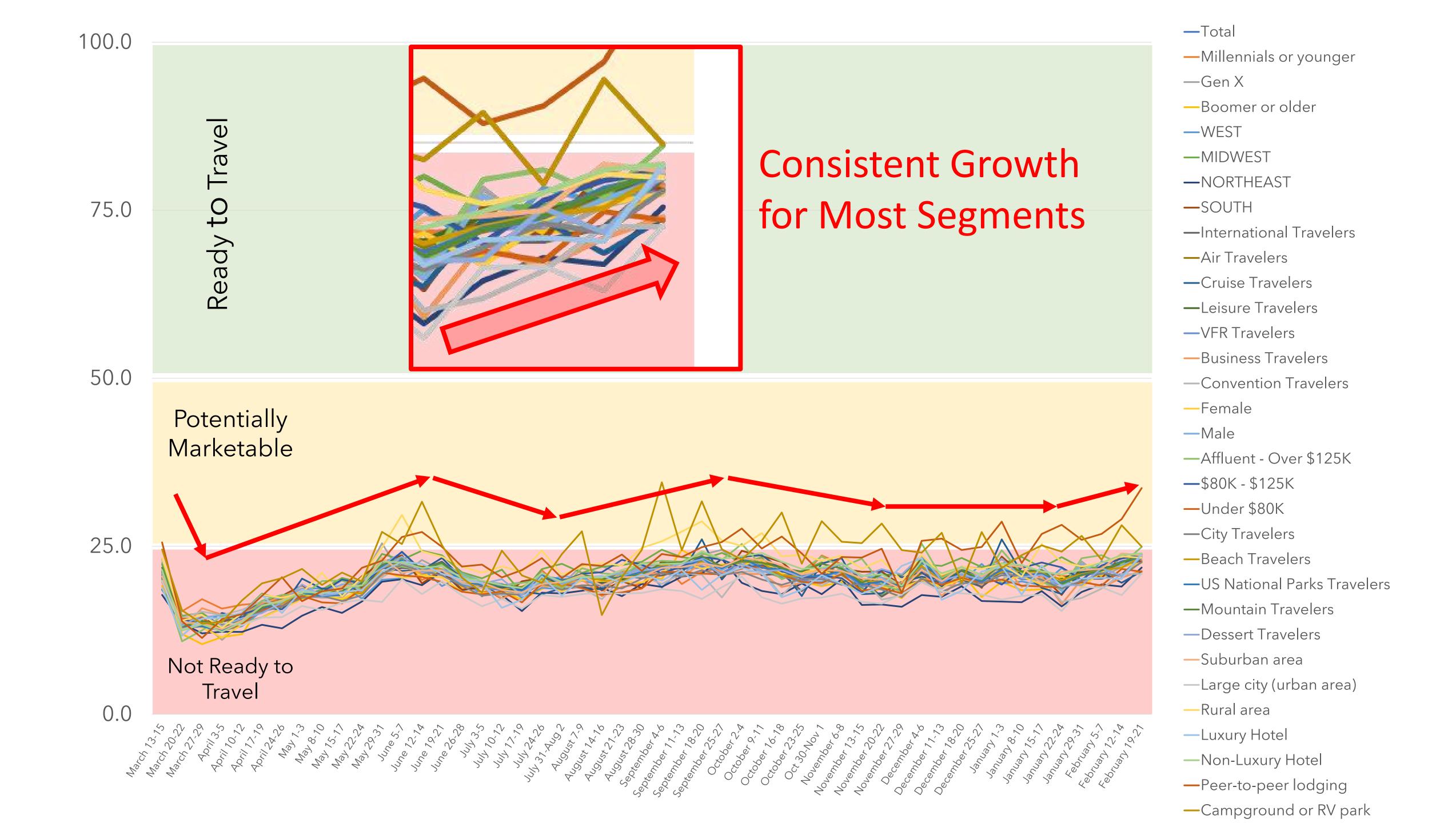


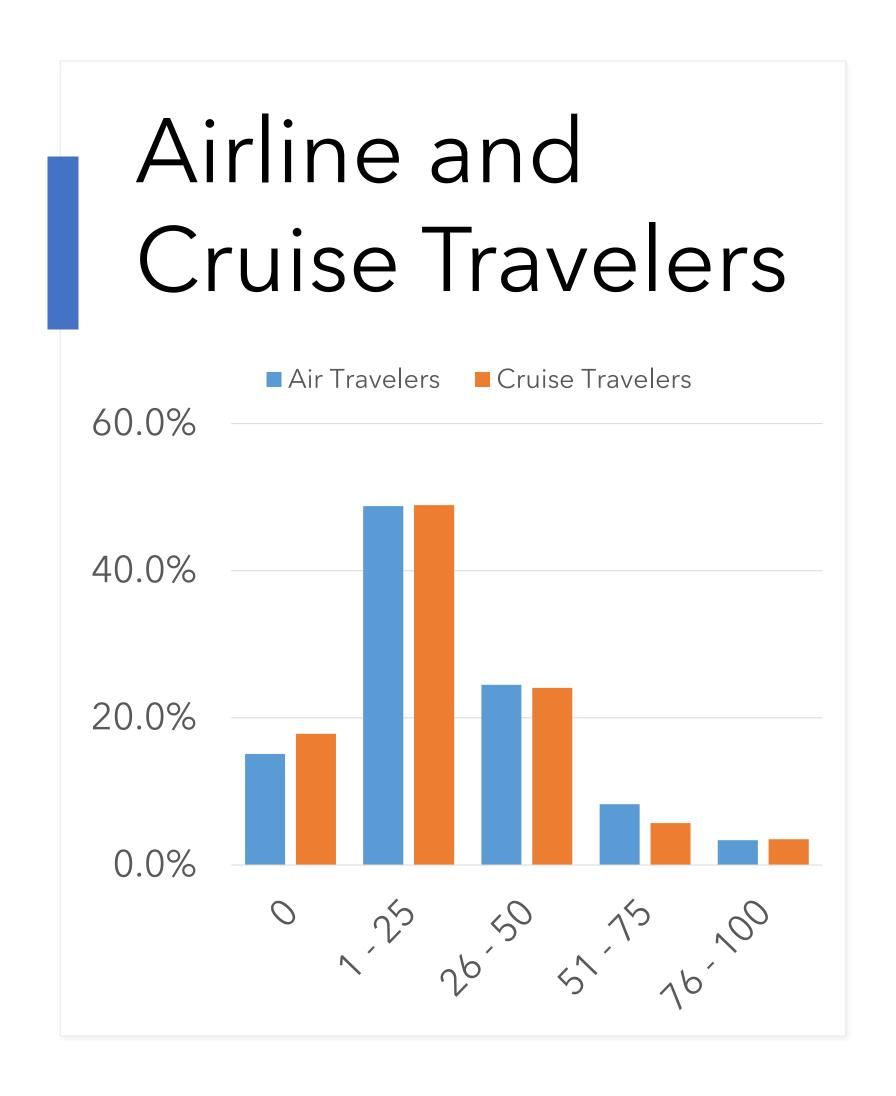
Healthy Travel Outlook

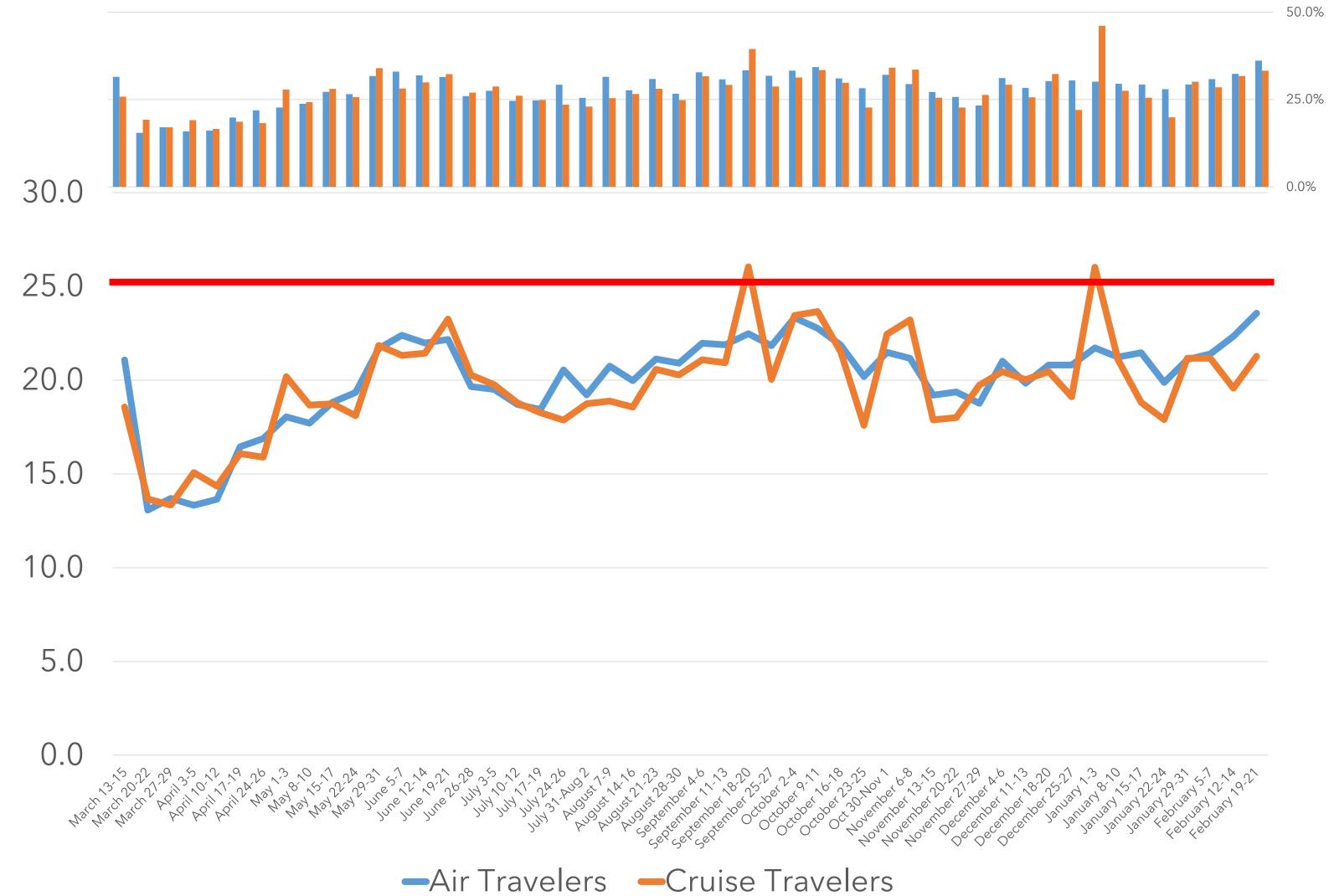


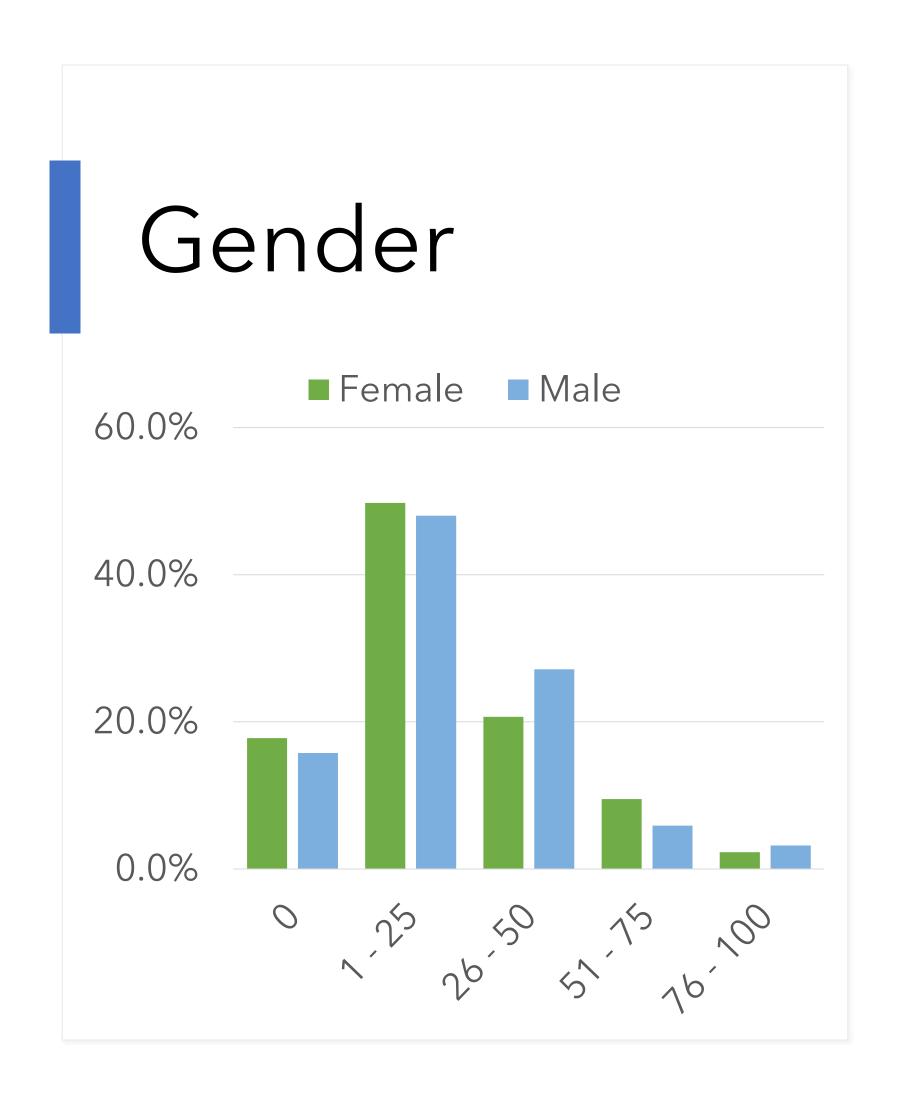
Travel Outlook

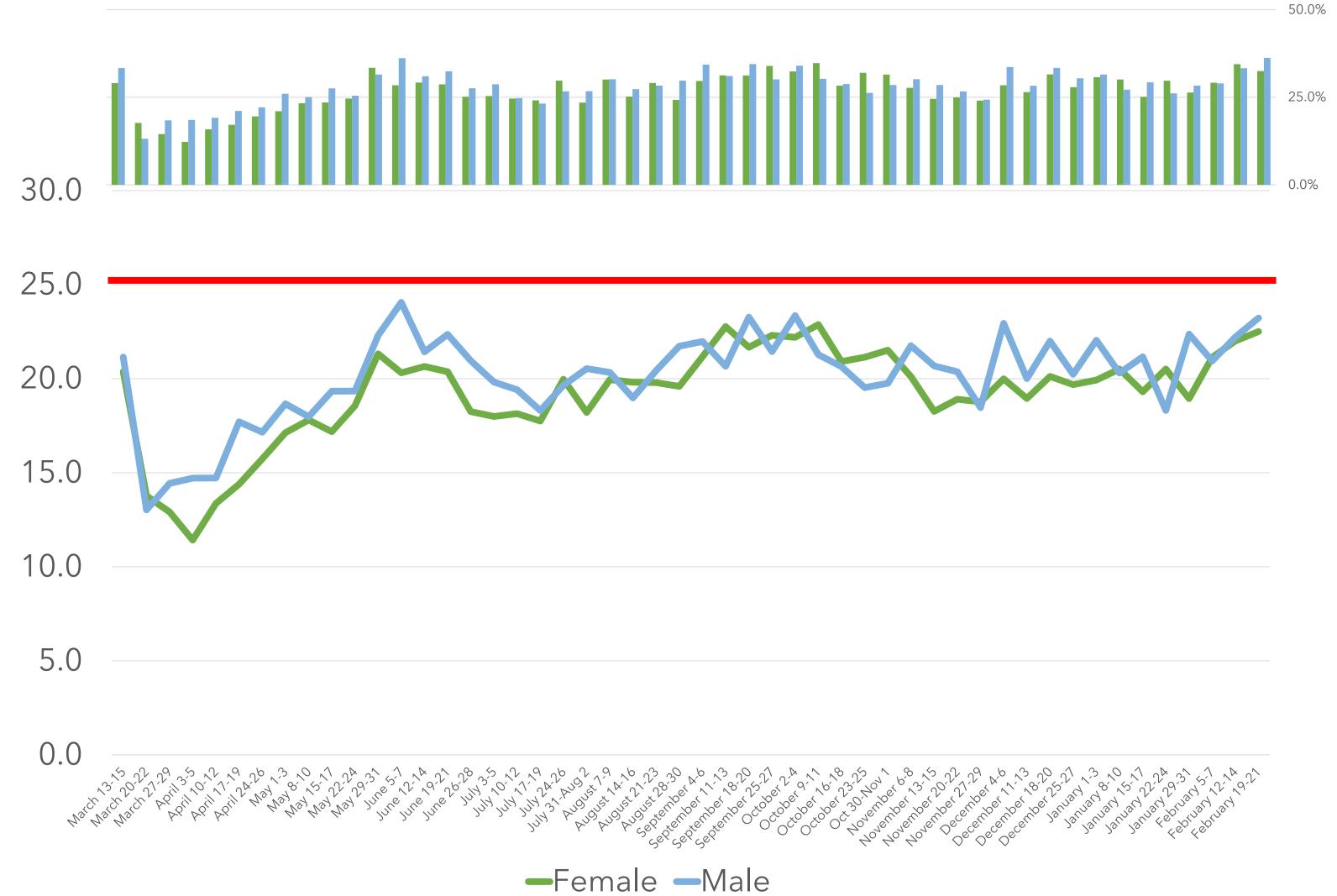


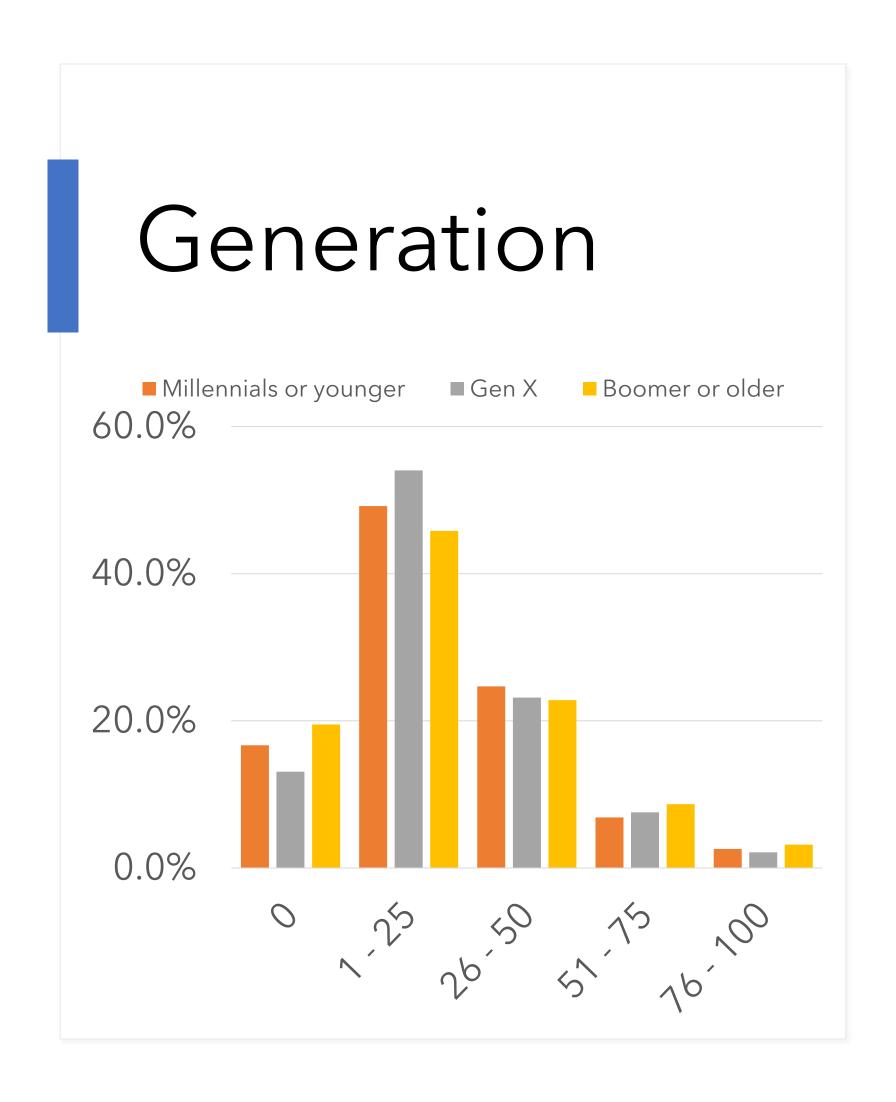


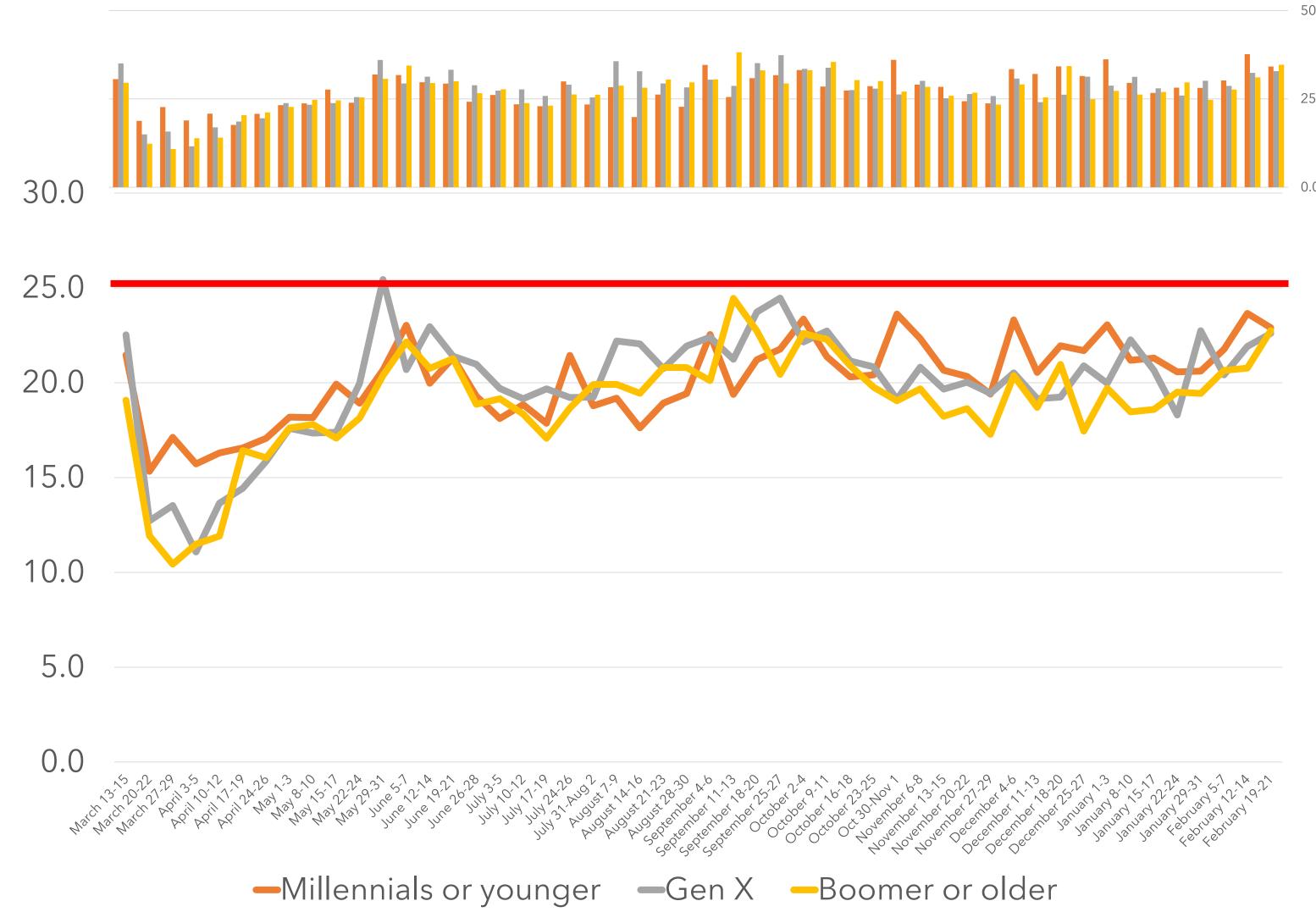


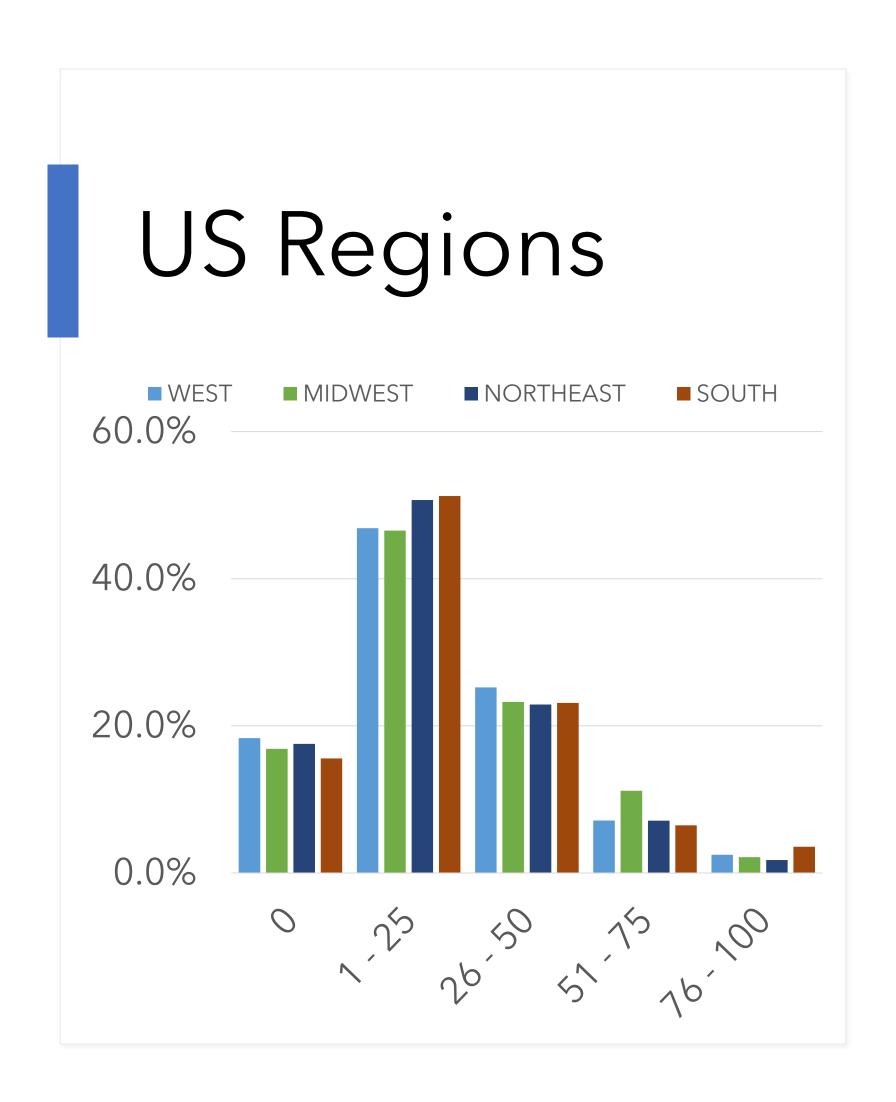


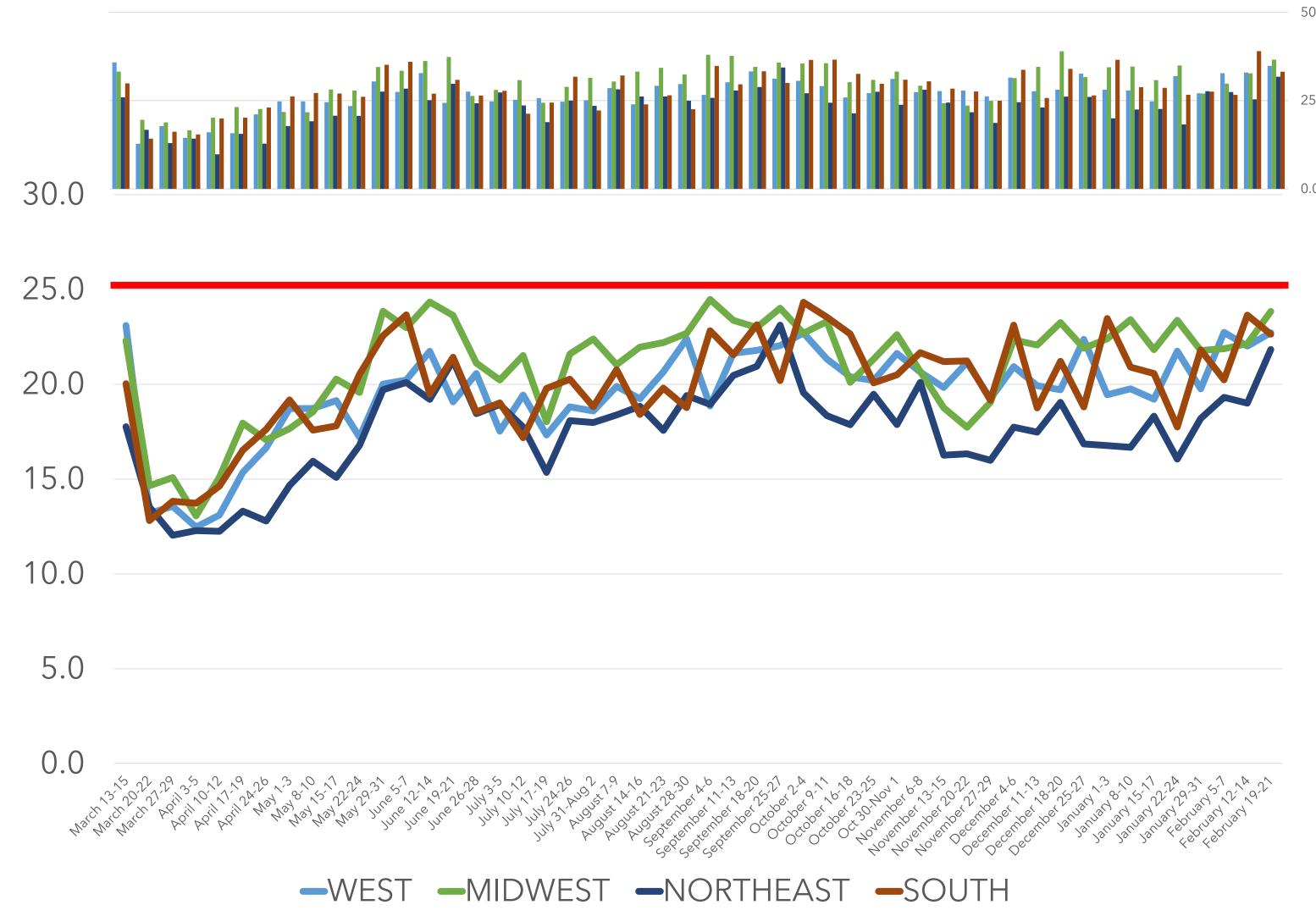


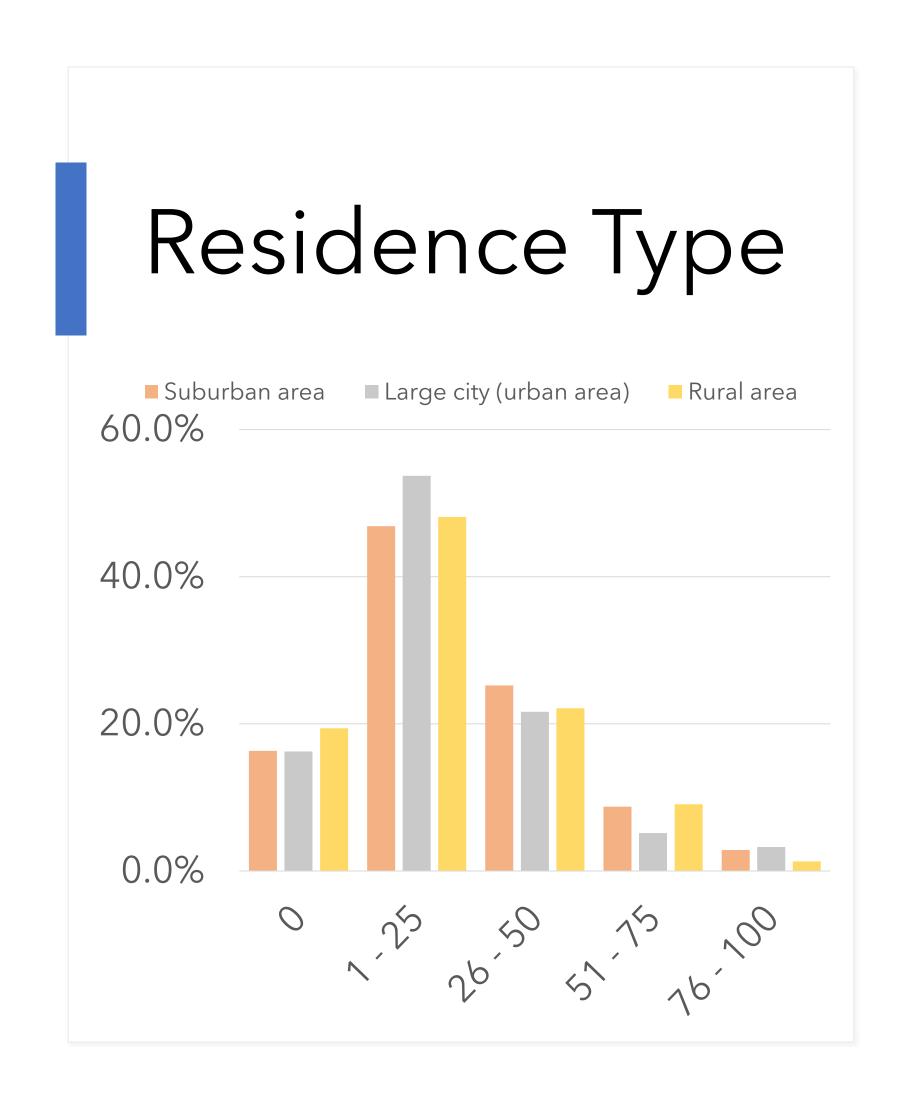


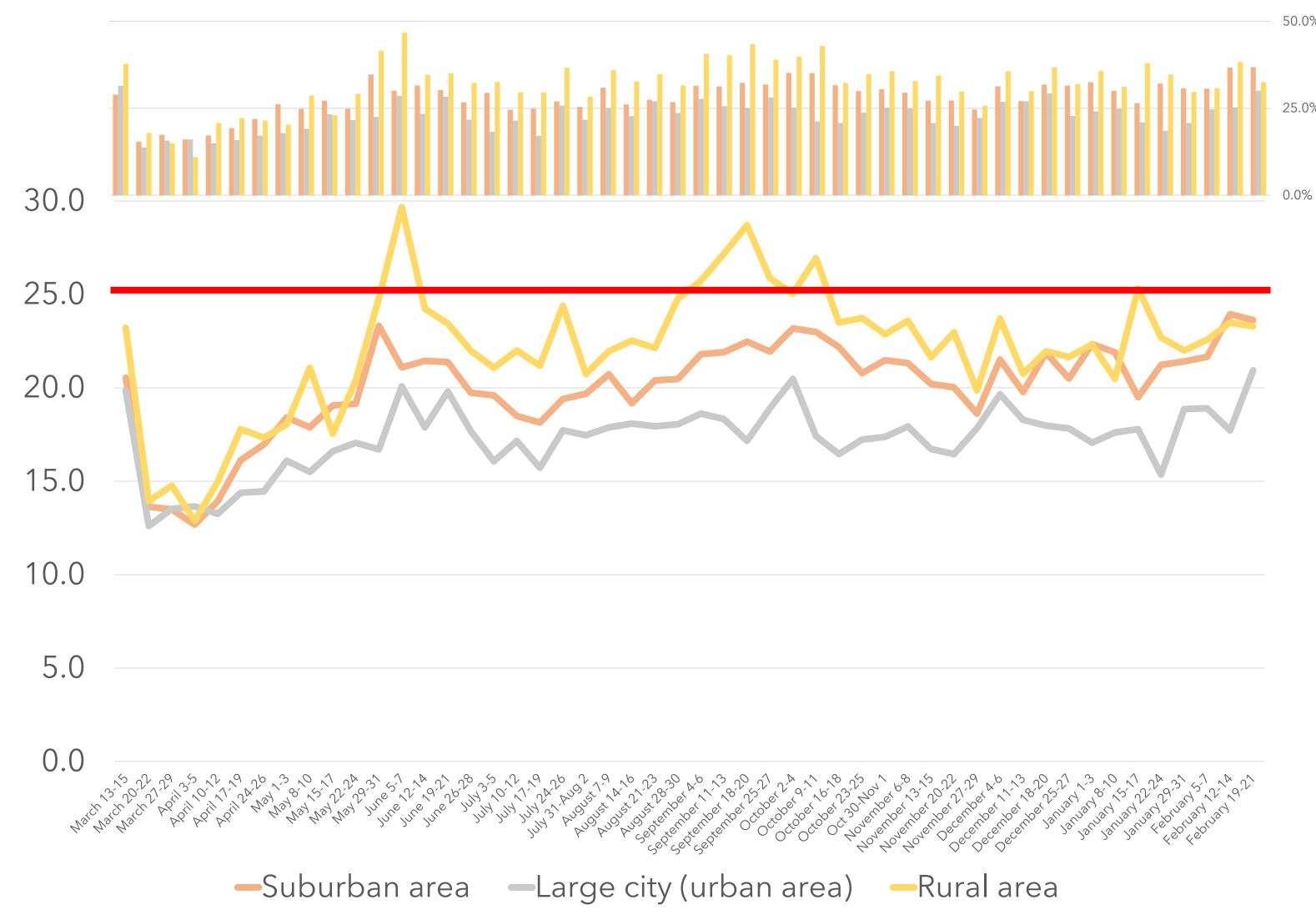


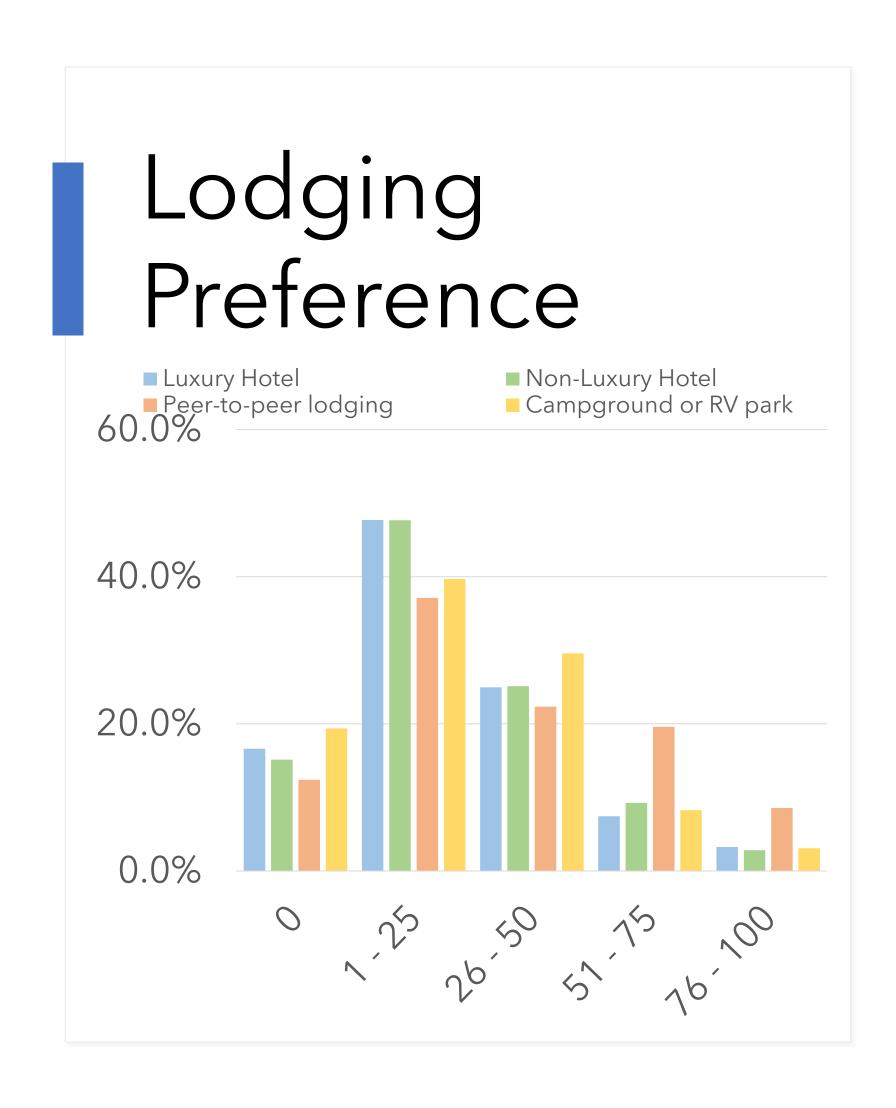
















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 Our full hub of insights is available at https://www.destinationanalysts.com/covid-19-insights/





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