

# DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF March 15<sup>th</sup>, 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.



## 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 DMO professionals from the most in-demand Spring Break destination for an important discussion about what's in store for this Spring Break season, expectations on who will visit and the measures being taken to encourage safety.**

**Sign up to attend the webinar on Tuesday, March 16<sup>th</sup> at 11:00am ET [here](#).**

# Key Findings for the Week of March 15<sup>th</sup>

Please cite **Destination Analysts** when using or distributing this data

# American Travelers' COVID-19 Vaccine Expectations

This week President Biden announced that states should execute vaccination plans which allow every American adult to be eligible for inoculation from COVID-19 by May 1st, and a vision that the July 4th holiday will be one celebrated in togetherness.

American travelers' response was a record number saying that the COVID vaccines are safe (70.9%), a record number of parents saying they will get their children vaccinated (55.2%) and a record number saying they have planned a trip specifically in anticipation of vaccines (42.9%). In total, 61.9% of American travelers say they have or will get vaccinated, up 5% from last week. Among those that have not yet received their shot, nearly 60% expect they will by July. Vaccine jealousy is a thing, too: 43.5% of all American travelers' report feeling jealous of those that have already received their vaccine, including 51.2% of Millennials.

## AMERICAN TRAVELERS' COVID-19 VACCINE EXPECTATIONS AS OF MARCH 14, 2021

70.9%

Feel the COVID-19 Vaccines are Safe



42.9%

Have Made Travel Plans Specifically in Anticipation of Vaccinations



61.9%

Have or Definitely Will Take a COVID-19 Vaccine



55.2%

Of Parents with School-Age Kids will Have their Children Vaccinated



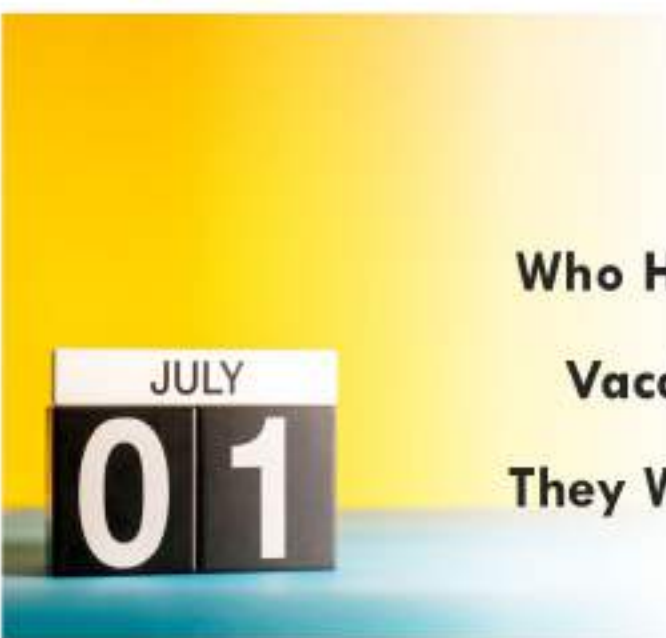
43.5%

Have Felt Jealousy of Others who Have Been Vaccinated



57.8%

Who Have Not Been Vaccinated Expect They Will Be by July



(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

# Excitement for Travel and Openness to Travel Inspiration Reach Pandemic Records

Americans' optimism about the course of the pandemic is up a staggering 40 percentage points since the start of the year, with 60.3% feeling things will get better in the next month. This optimism especially shines through in their feelings towards travel. **Fully two-thirds are now in a travel readiness state-of-mind. Americans rate their level of excitement about travel this year a 6.6 on a scale from 0-10, up from 6.2 in just the past week. Americans set another pandemic record in their openness to travel inspiration, hitting 6.5 on the 11-point scale.** Nearly half (48.9%) can now be motivated by discounts and deals to take a trip they had not previously considered.

## EXCITEMENT FOR TRAVEL AND OPENNESS TO TRAVEL INSPIRATION REACH PANDEMIC RECORDS



**Question:** Which best describes how excited you are about leisure travel in this year (2021)?

(Base: Waves 43-53 data. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209 and 1,204 completed surveys.)



**Question:** At this moment, how interested are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Waves 1-53 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, 1,203, 1,204, 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, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209 and 1,204 completed surveys.)

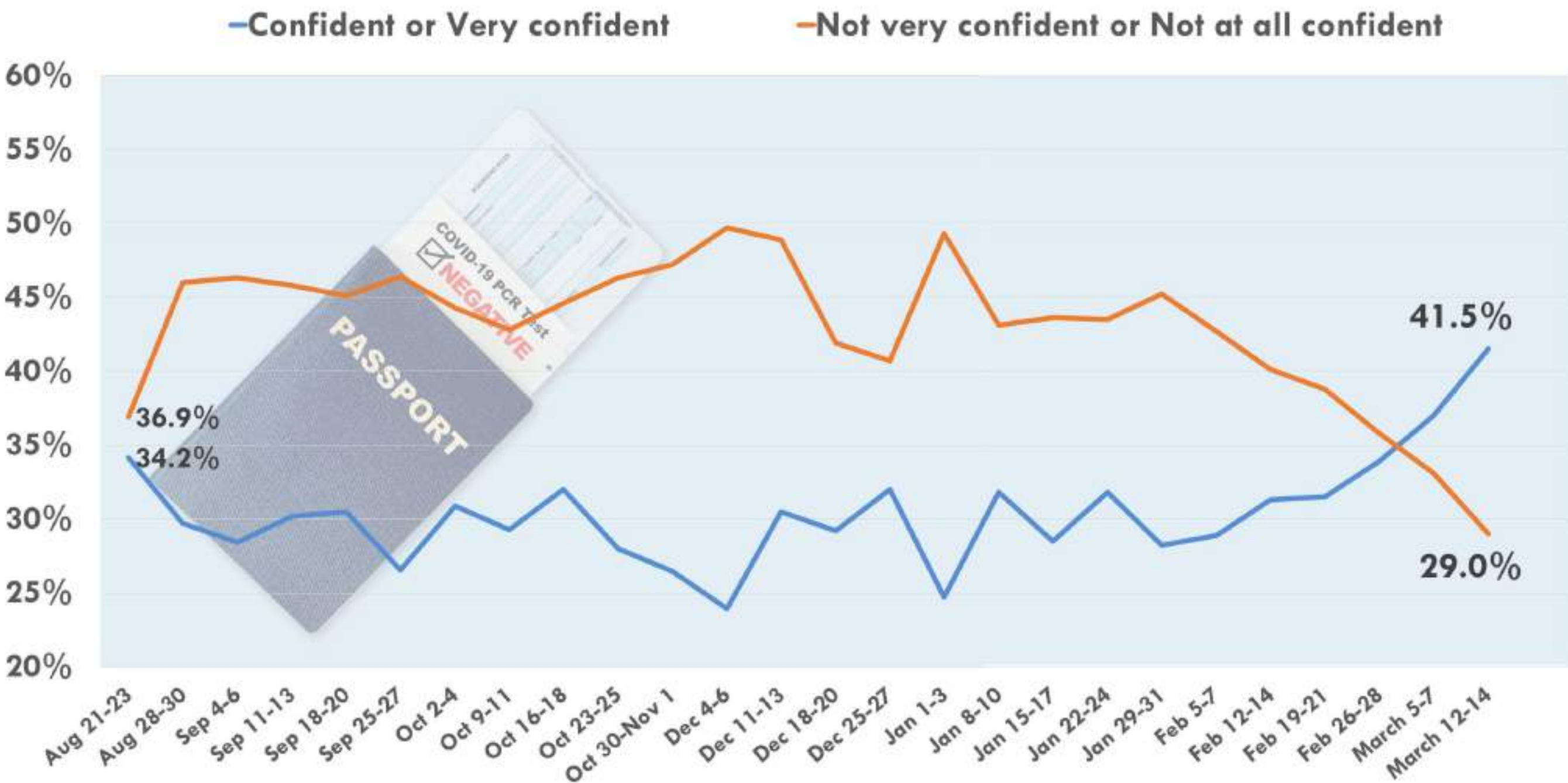
# Americans’ Increasing Confidence in their Ability to Travel Safely

A factor in this growing openness and excitement towards travel is certainly an increasing sense of safety.

A majority of American travelers no longer feel unsafe traveling in taxis or rideshares, visiting indoor attractions, dining in restaurants, shopping, flying on airplanes and staying in hotels. **This week, 41.5% are firmly confident they can travel safely in the current environment, up nearly 5 percentage points since the week prior, and 17 percentage points since January 3rd.**

Still, COVID continues to be top-of-mind and should not be discounted in travel messaging. As an example, 43.1% of Spring Break travelers say they remain “very concerned” about contracting the virus on their trip.

## AMERICANS’ INCREASING CONFIDENCE IN THEIR ABILITY TO TRAVEL SAFELY AUGUST 21, 2020 – MARCH 14, 2021



**Question:** How confident are you that you can travel safely in the current environment?

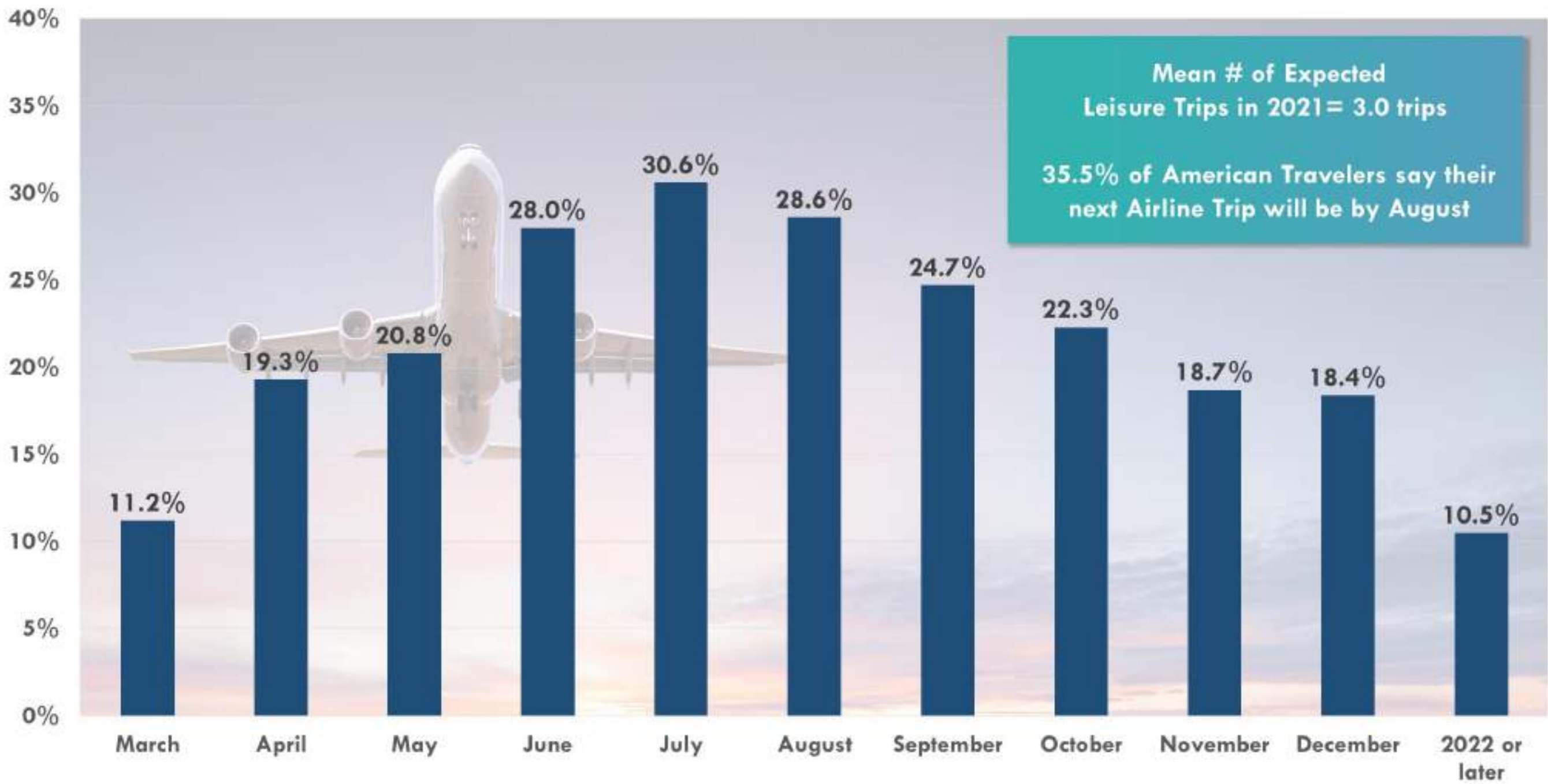
(Base: Waves 24-34 and 39-53 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209 and 1,204 completed surveys.)

# Months of Expected Leisure Trips in 2021

Over 70% of American travelers dreamt or planned travel in the past week, and these actions look to increasingly be turning into trips.

The average number of leisure trips Americans are reporting they will take in 2021 increased this week to 3.0 after hovering at 2.8 for much of the year. All months from June forward saw increases in the percent of Americans who said they had trips at least tentatively planned in them. Fully 15.0% of American travelers said they made travel reservations and/or bookings in the last week, largely for hotels and airline tickets. **In fact, 35.5% of American travelers say their very next trip by air will be by August.**

**MONTHS OF EXPECTED LEISURE TRIPS IN 2021**  
**AS OF MARCH 14, 2021**



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

(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

# Tracking Urban Recovery

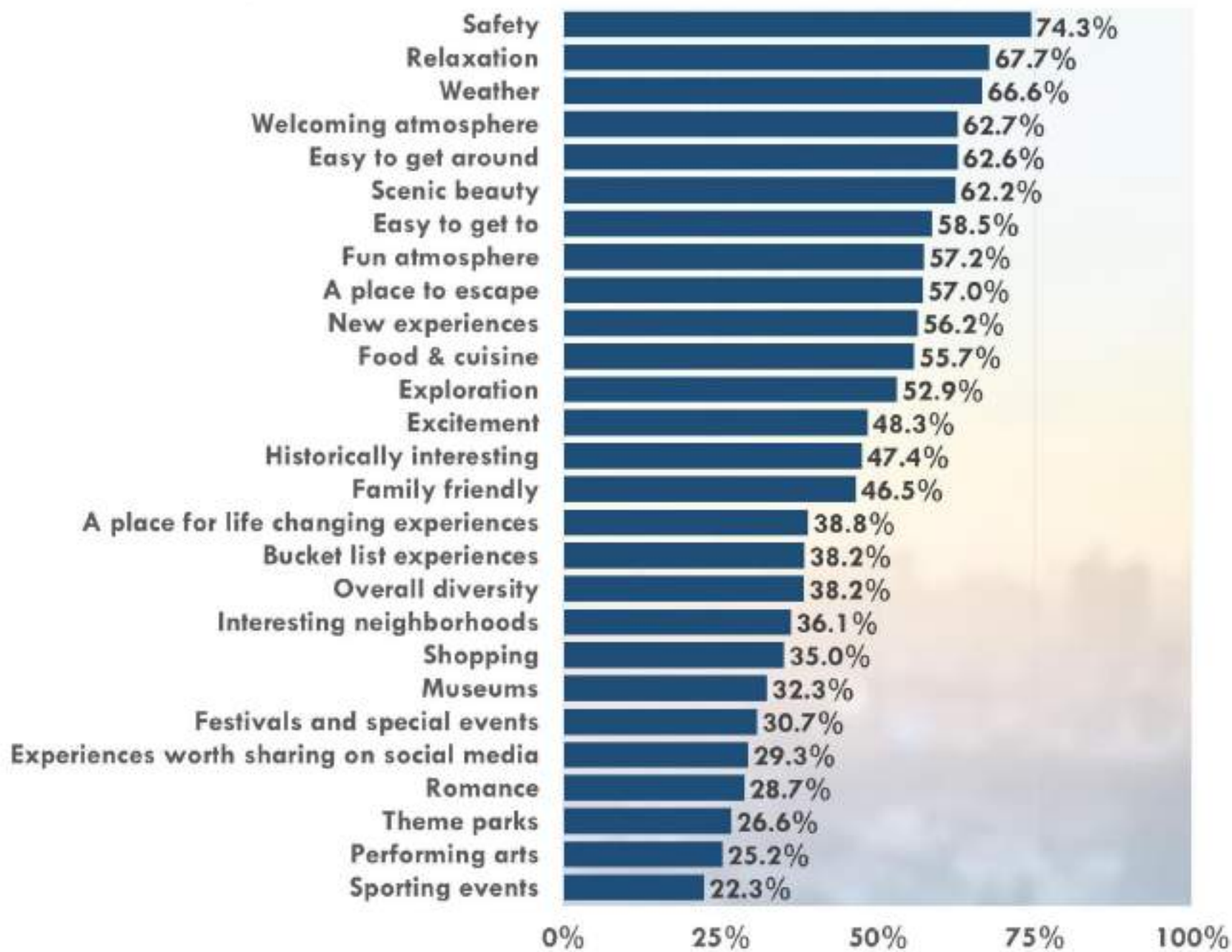
As we reported last week, our cities continue to show signs of recovery.

Over one-third of those Americans traveling in the next three months will be visiting an urban destination. In looking at what attributes are important to travelers as they consider cities as places to visit, safety still remains largely on top, with 74.3% saying this is important. A relaxing environment, good weather, welcoming atmosphere, ease in getting around and scenic beauty are also most critical. Where the pandemic is still most challenging the experiences travelers typically seek from urban destinations is in sports, festivals, performing arts and other live events, but other tenets such as museums and dining scene are also still seen as challenged.

These perceptions are likely to change as vaccinations increase and more reopening occurs.

## TRACKING URBAN RECOVERY: HOW TRAVELERS CONSIDER CHOOSING THESE DESTINATIONS AS OF MARCH 14, 2021

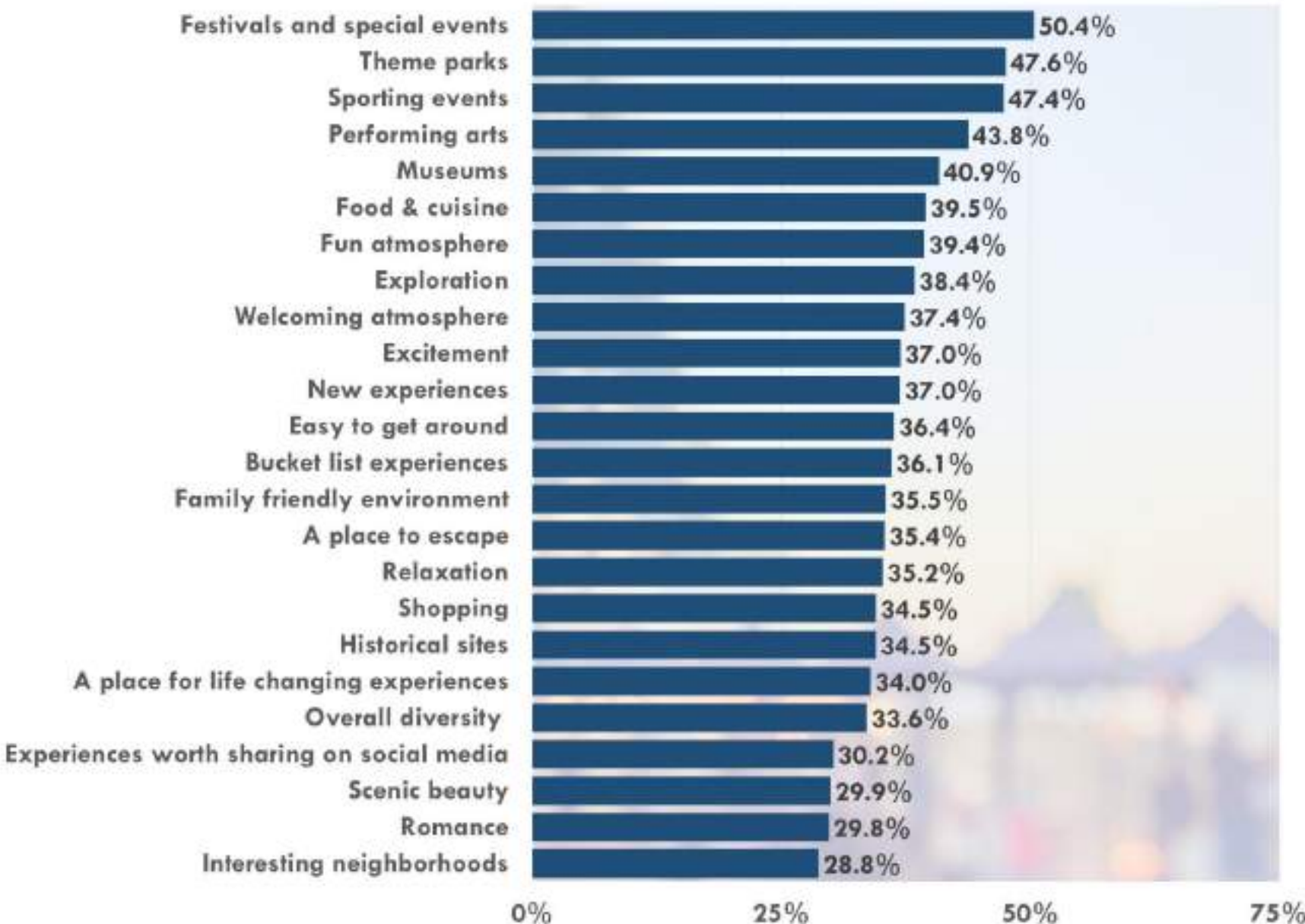
IMPORTANT ATTRIBUTES TO  
URBAN DESTINATION SELECTION  
(% IMPORTANT OR CRITICALLY IMPORTANT)



**Question:** Please think about why you visit cities and urban areas. How important are each to how you would generally select the cities or urban areas you visit?

(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

THE IMPACT OF THE PANDEMIC ON TRAVELERS’  
ABILITY TO ENJOY URBAN EXPERIENCES  
(MOST IMPACTED EXPERIENCES—  
% SAYING “MAKES IT IMPOSSIBLE” OR “SIGNIFICANT EFFECT”)



**Question:** Imagine you were planning a leisure trip in the next six (6) months. How much of an effect do you feel the coronavirus situation would have on your ability to enjoy each element of an urban destination?

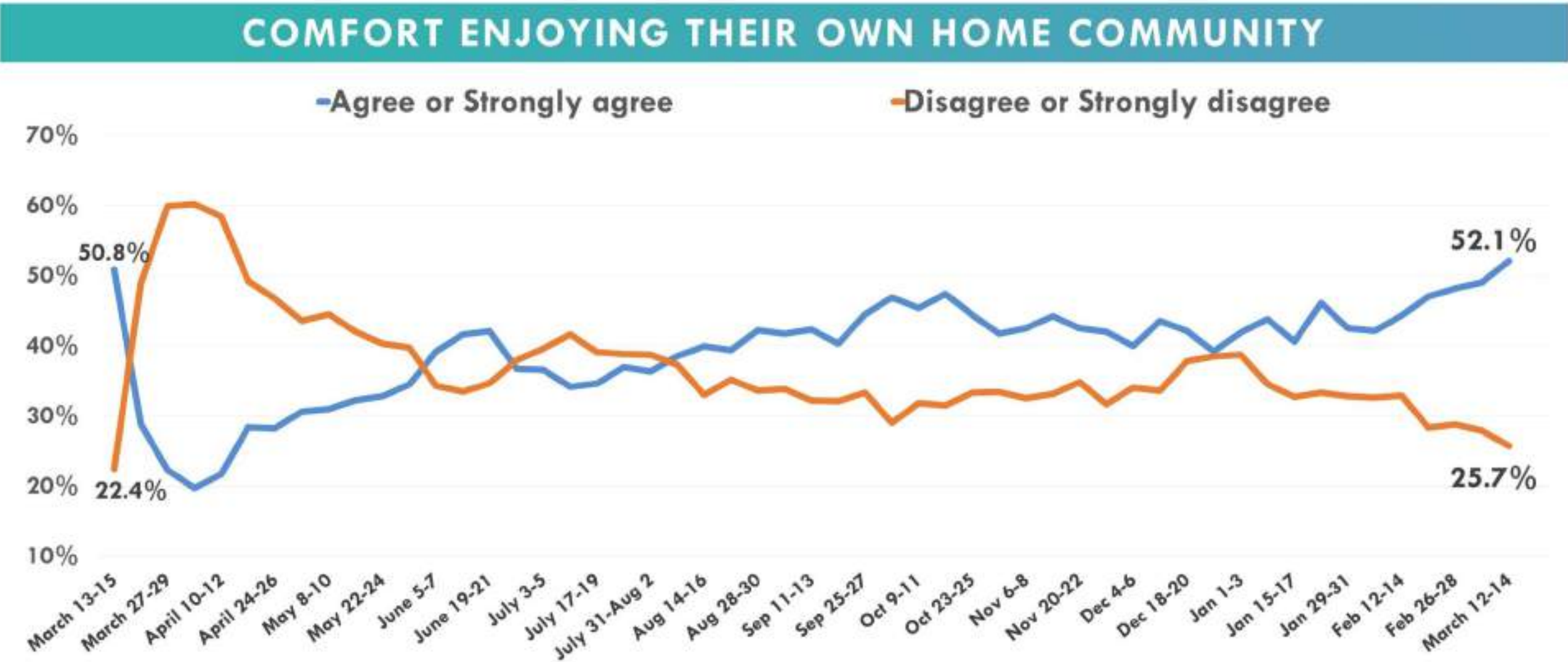
(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

# Americans' Comfort with Tourism at Home

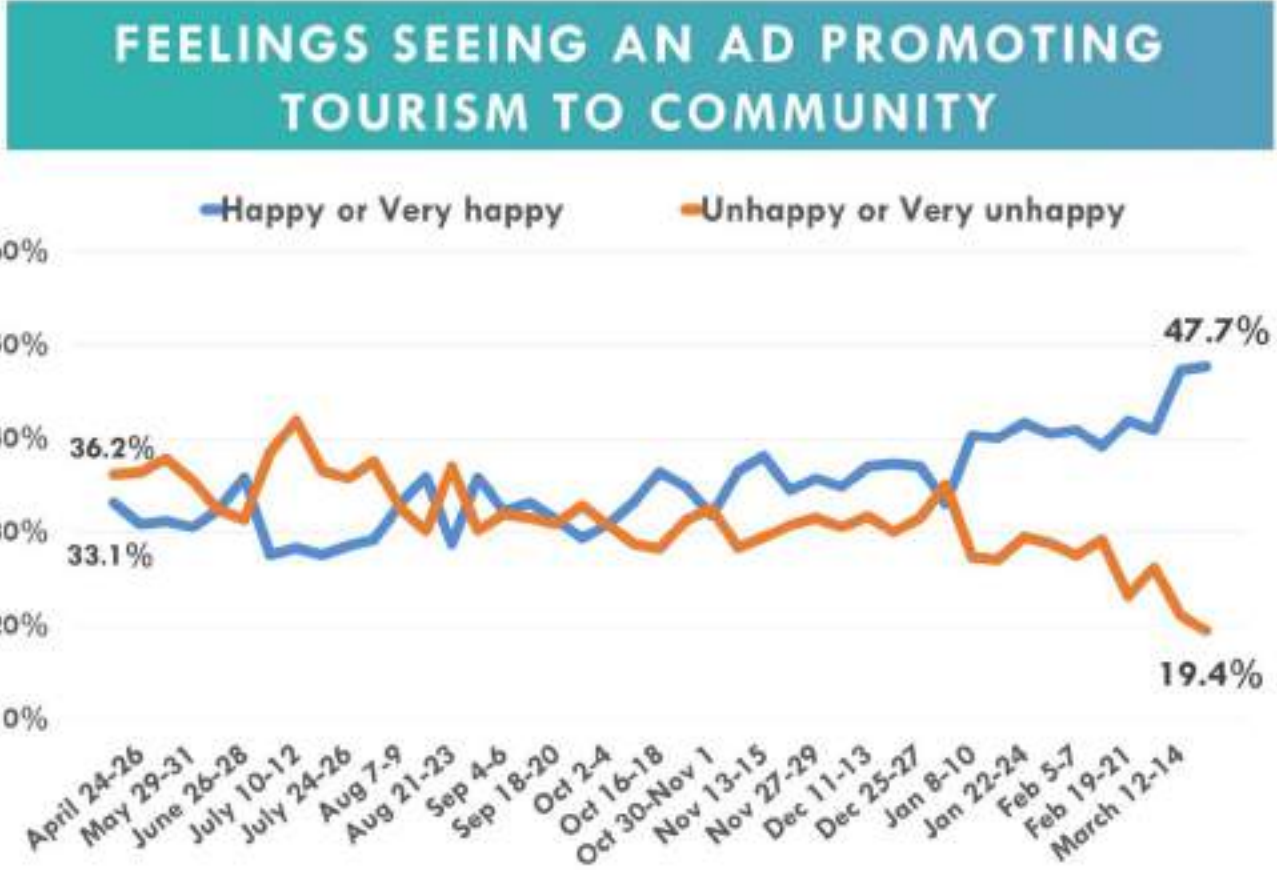
Finally, Americans are returning to a comfort with tourism closer to home.

A pandemic-record 52.1% now feel comfortable going out for leisure activities within their own community. While 46.9% of Americans still agree they don't want tourists in their own community yet, this is down 12 percentage points since the start of the year. Another pandemic record 47.7% said they would be happy if they saw an ad promoting their community for tourism when safe, up from 35.1% January 3rd.

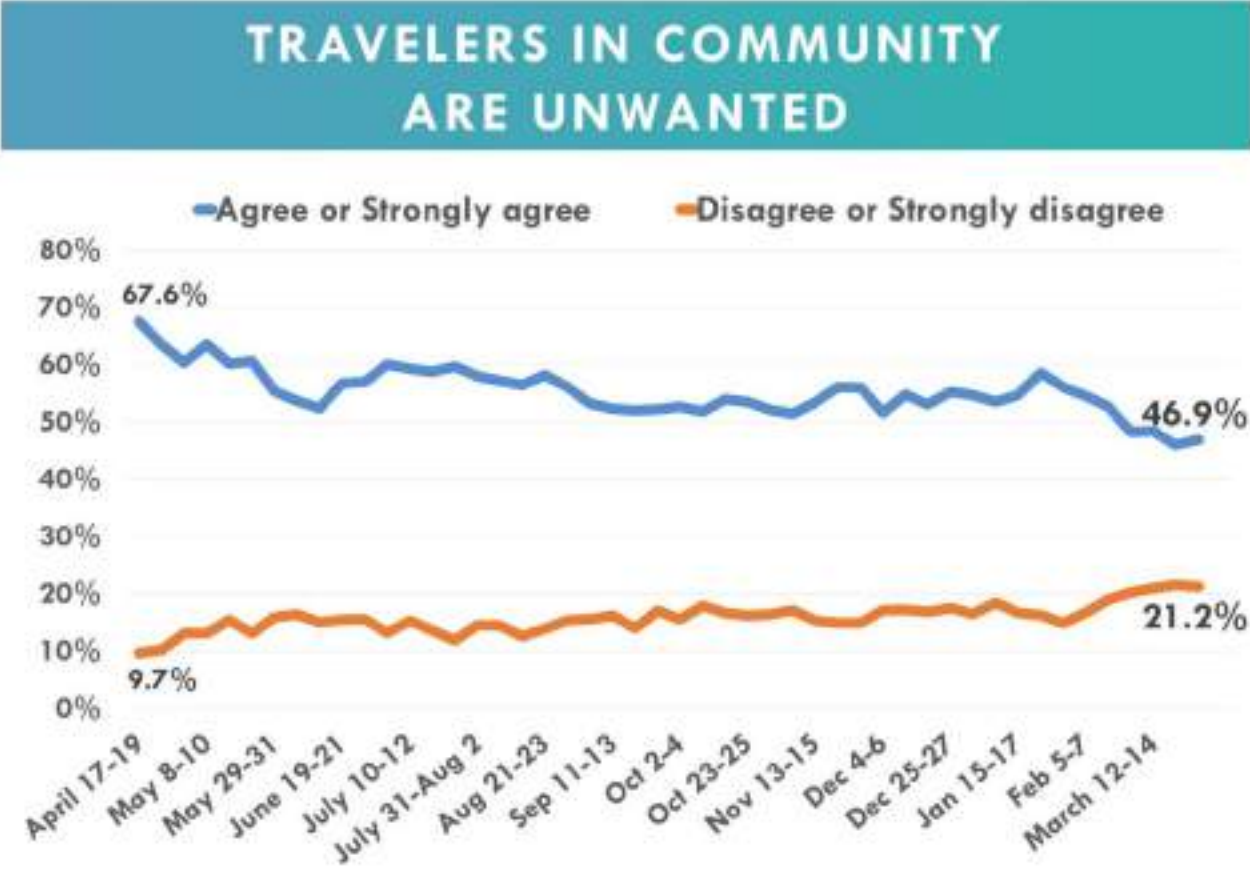
## AMERICANS' INCREASING COMFORT WITH TOURISM AT HOME AS OF MARCH 14, 2021



HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT?  
STATEMENT: I FEEL COMFORTABLE GOING OUT IN MY COMMUNITY TO RESTAURANTS, LOCAL ATTRACTIONS AND UNDERTAKING LOCAL ACTIVITIES.



QUESTION: HOW WOULD YOU FEEL IF YOU SAW AN ADVERTISEMENT TODAY PROMOTING YOUR COMMUNITY AS A PLACE FOR TOURISTS TO COME VISIT WHEN IT IS SAFE?



HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENT?  
STATEMENT: I DO NOT WANT TRAVELERS COMING TO VISIT MY COMMUNITY RIGHT NOW.

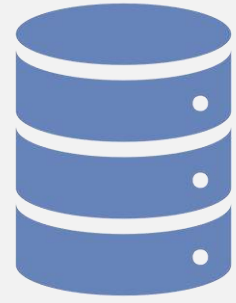


# Coronavirus Travel Sentiment Index

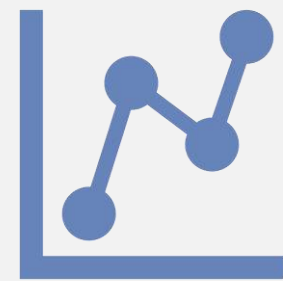
## Measuring the Potential Influence of Travel Marketing

Highlights from the Week of March 15<sup>th</sup>

# What is a Predictive Index?



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



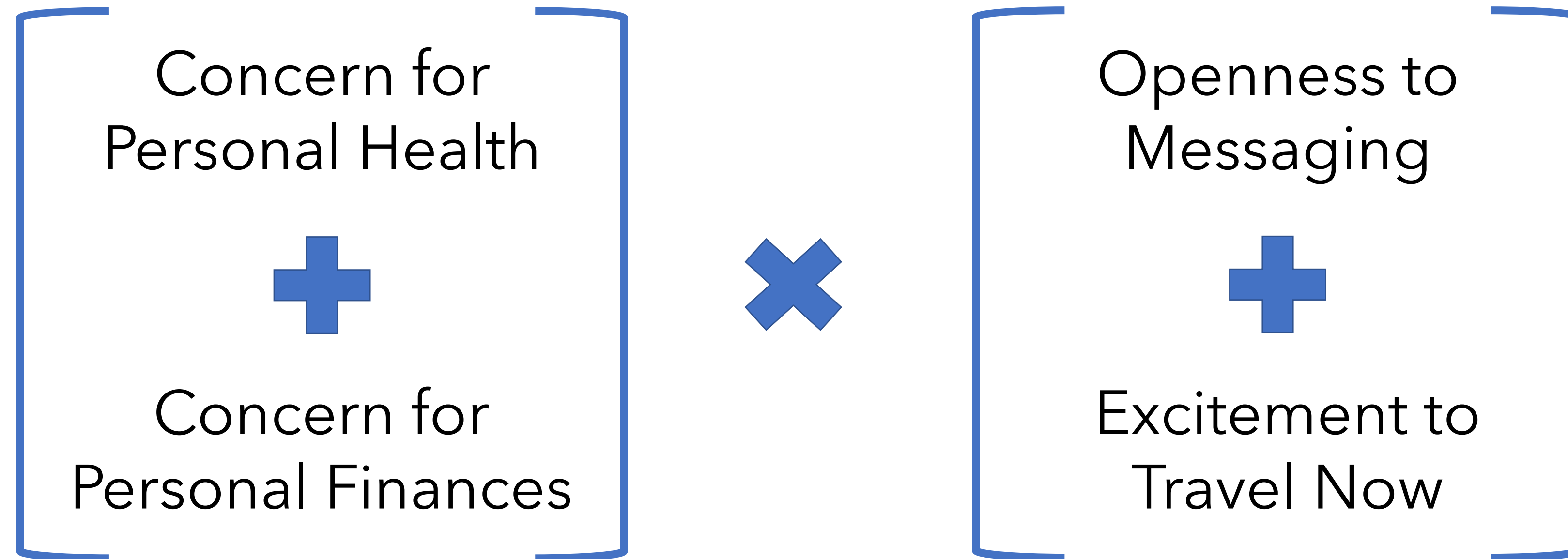
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

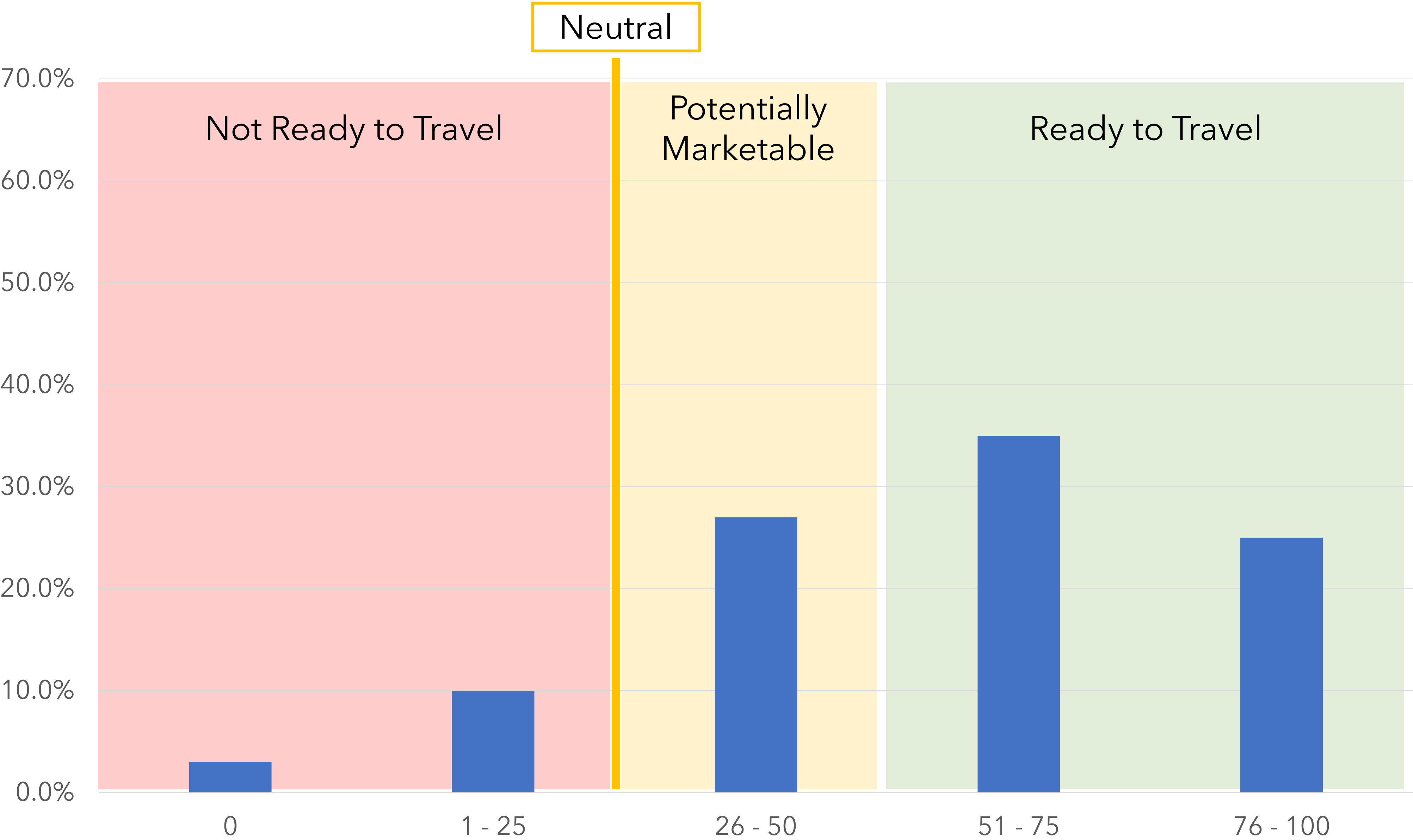
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

# Predictive Index Formula



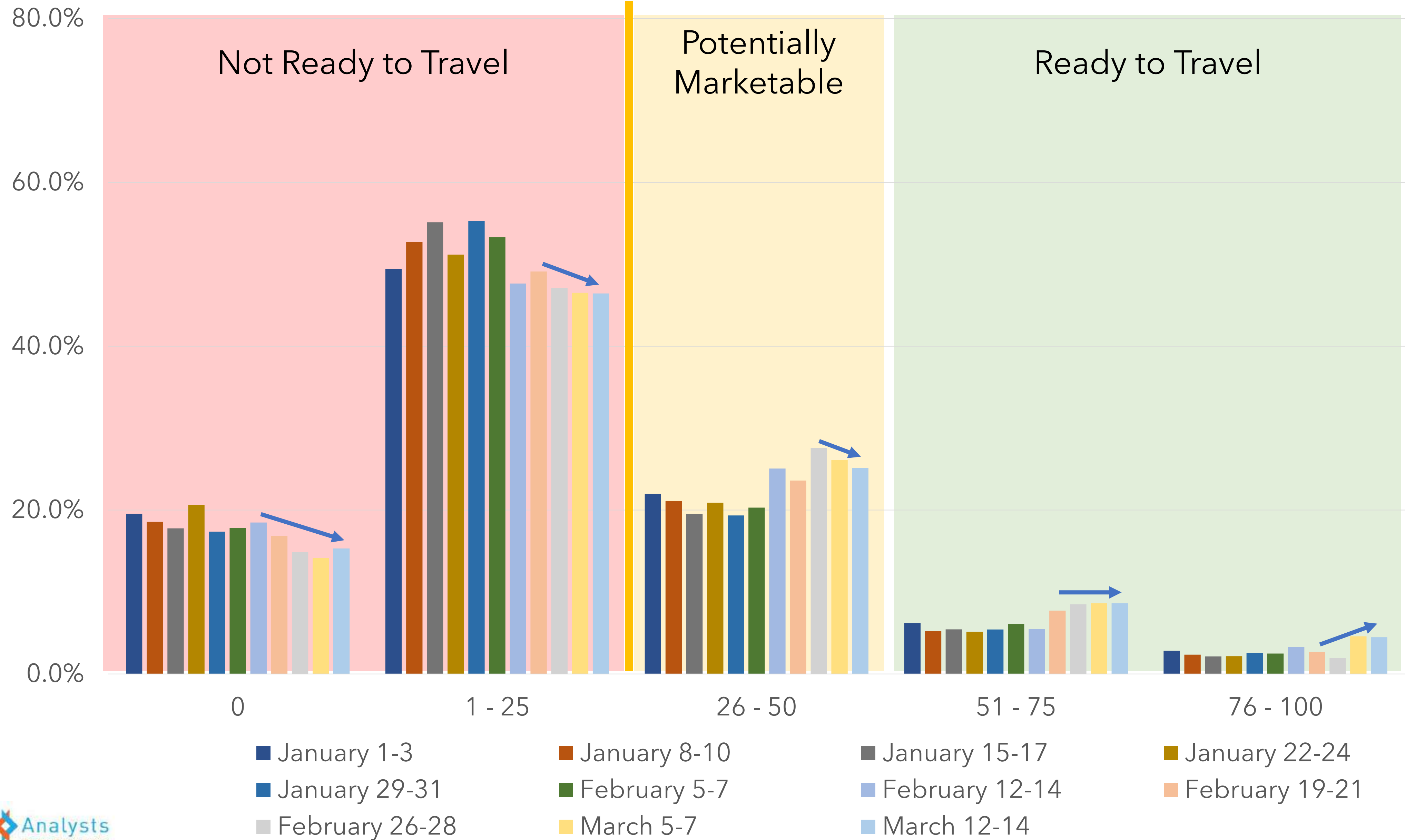
\*Normalized to a 100pt scale

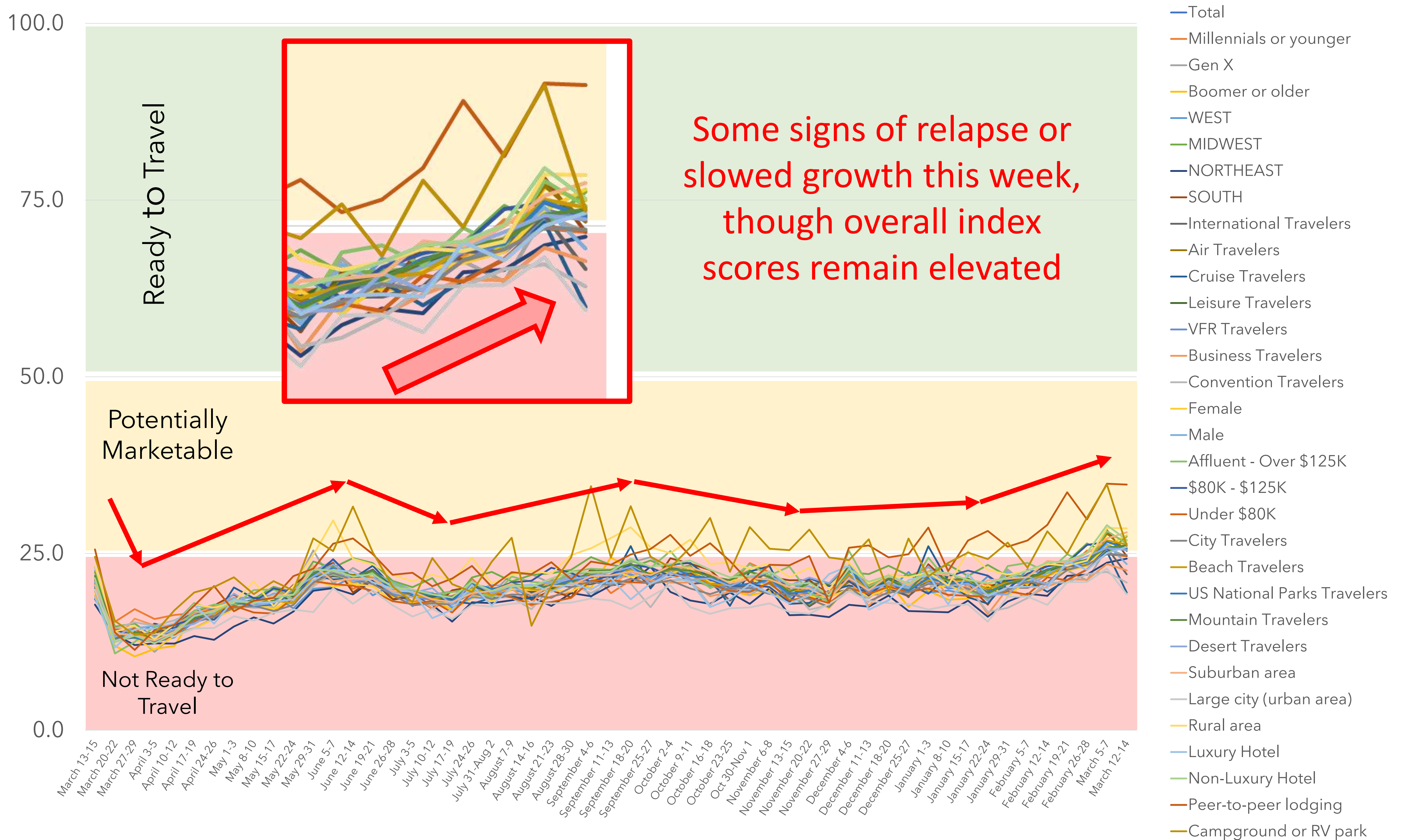
# Healthy Travel Outlook

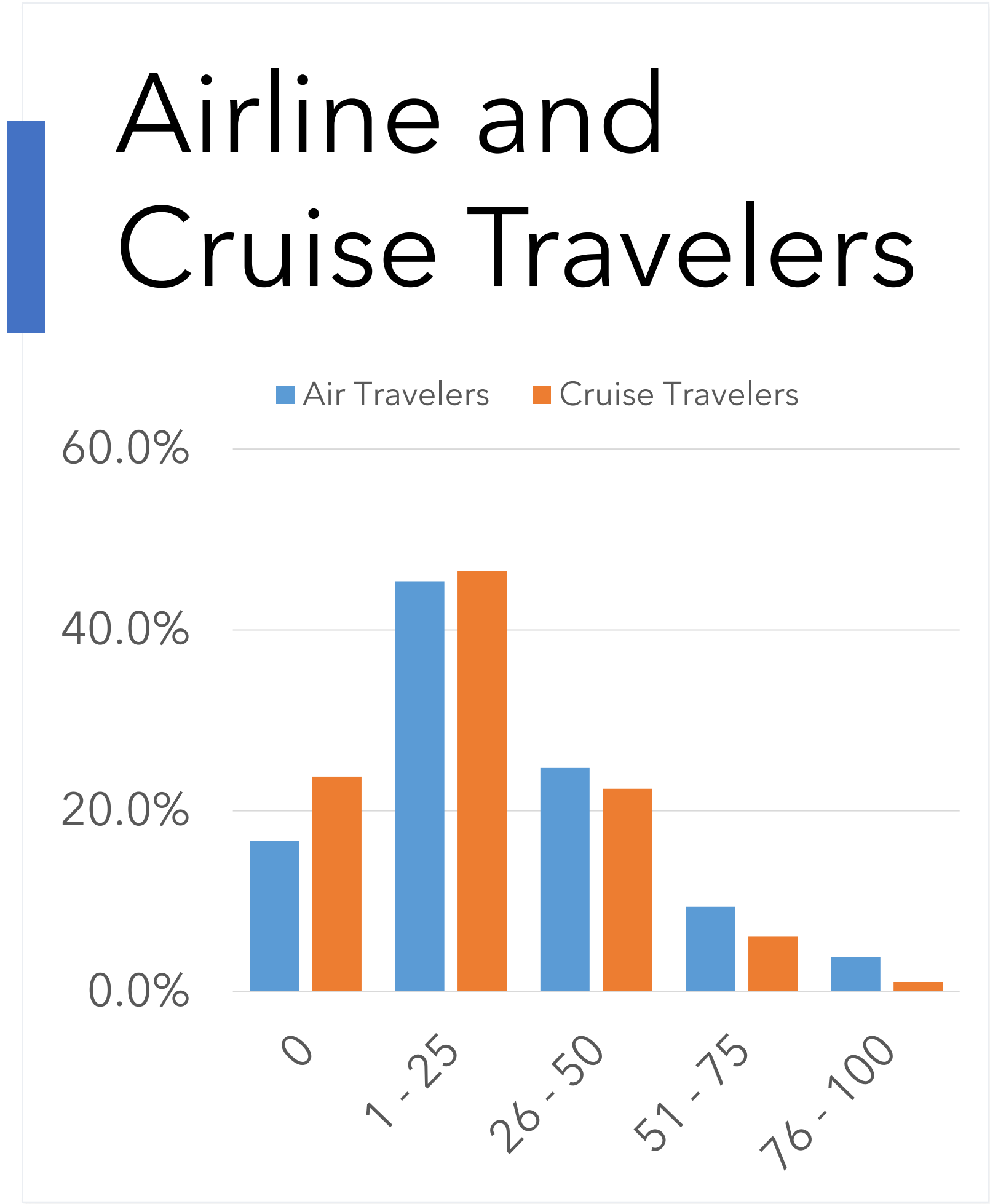


# Travel Outlook

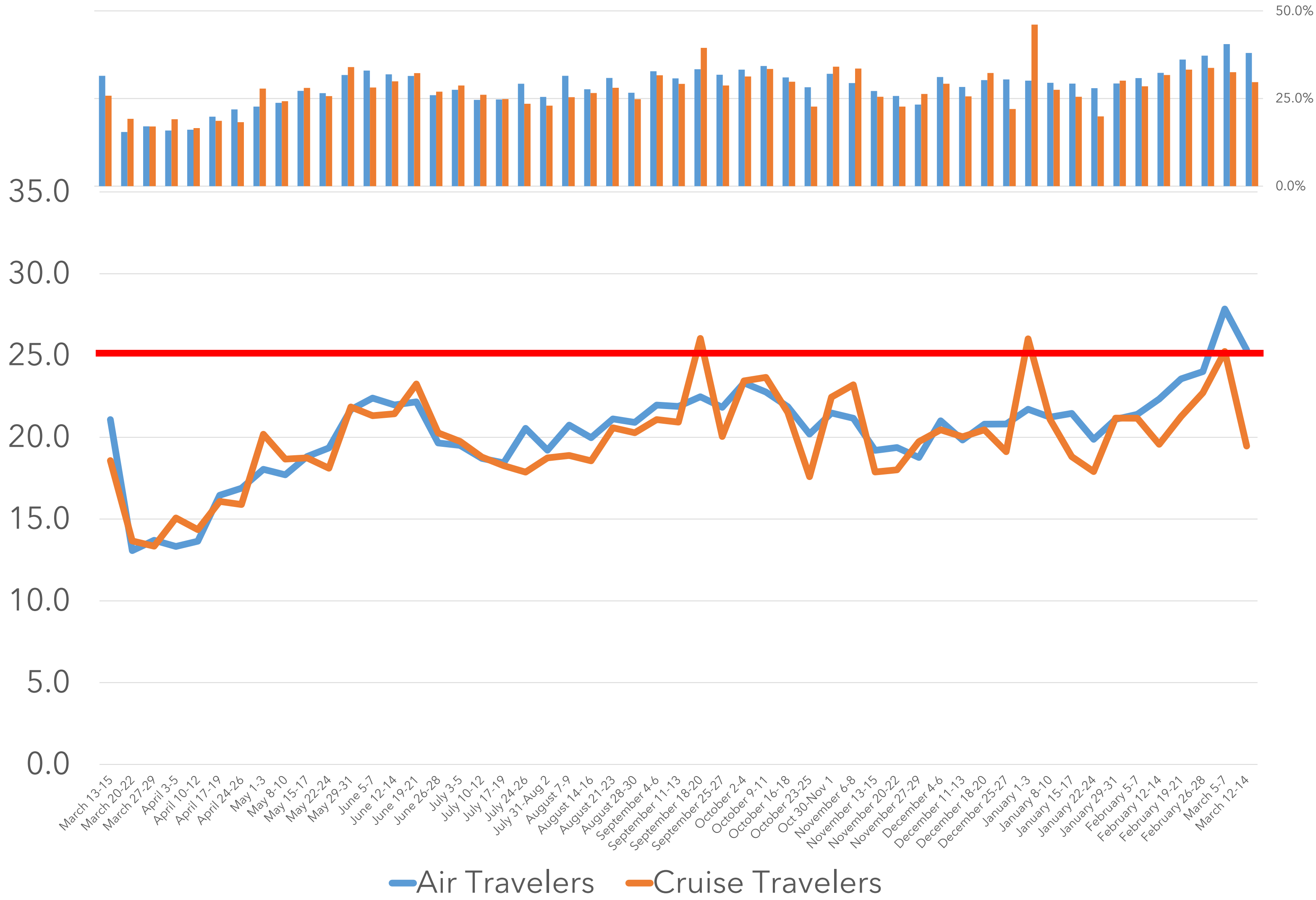
Neutral



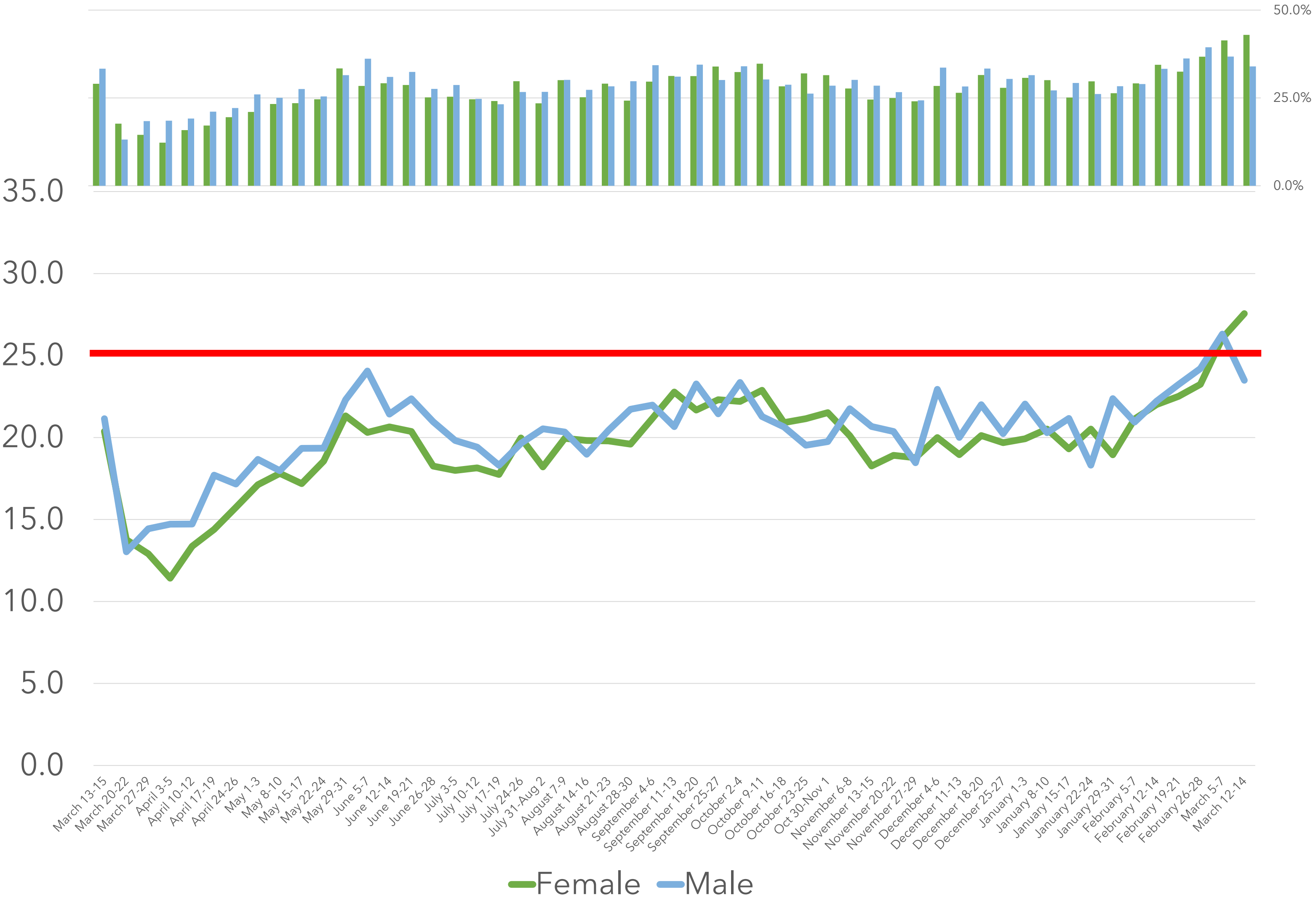




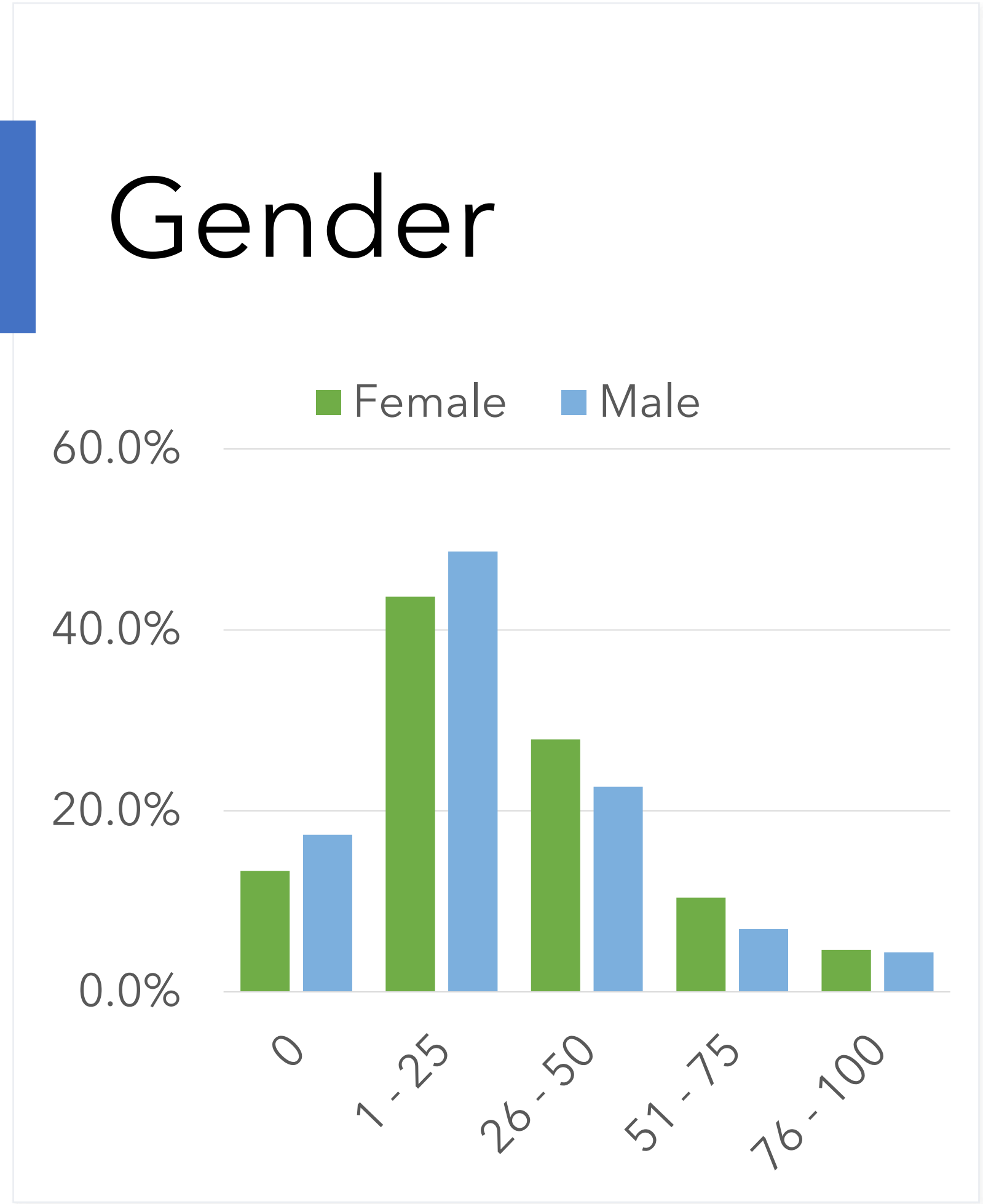
Percent Potentially Marketable  
(Index Above 25)



Percent Potentially Marketable  
(Index Above 25)

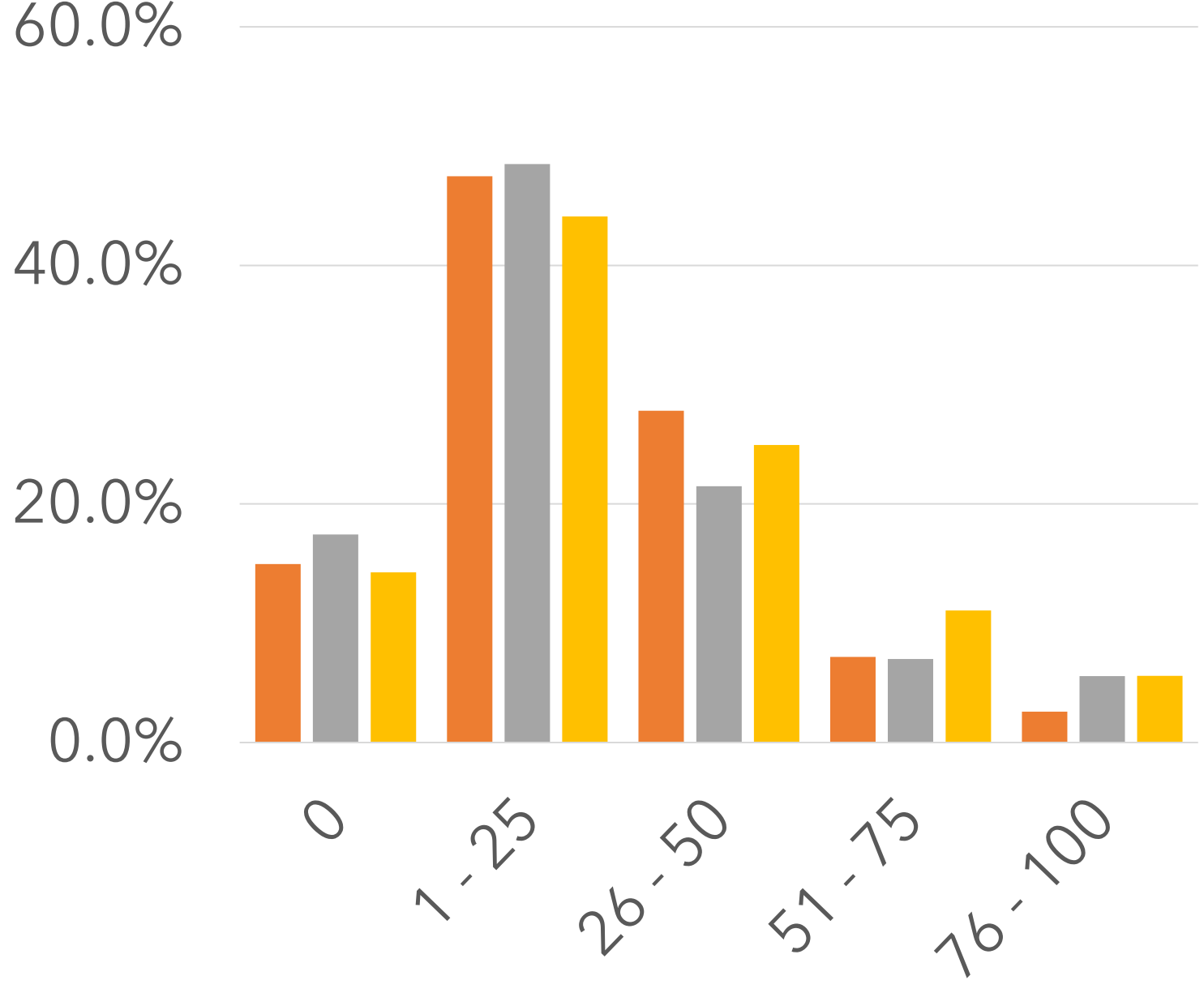


# Gender

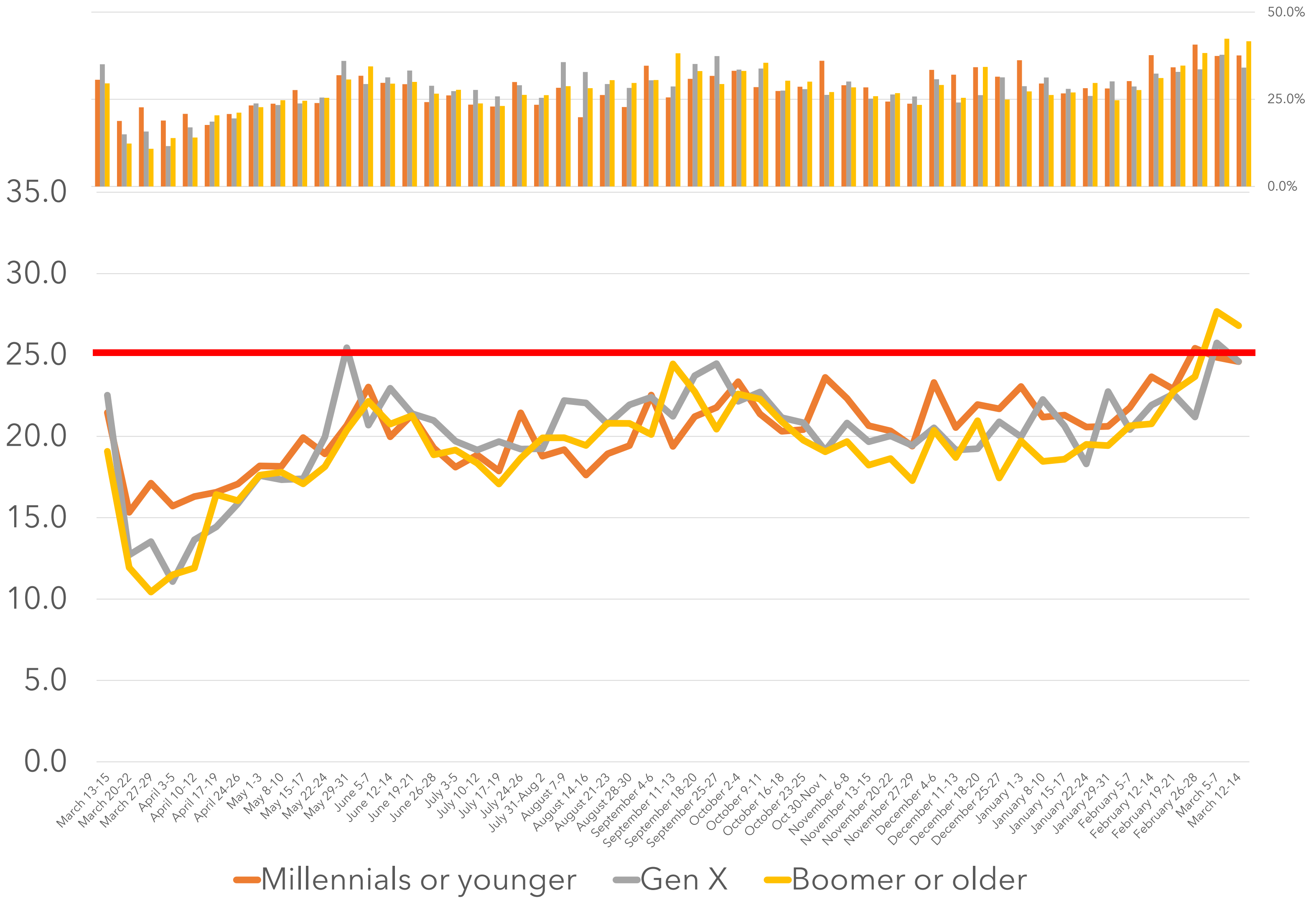


# Generation

Millennials or younger    Gen X    Boomer or older

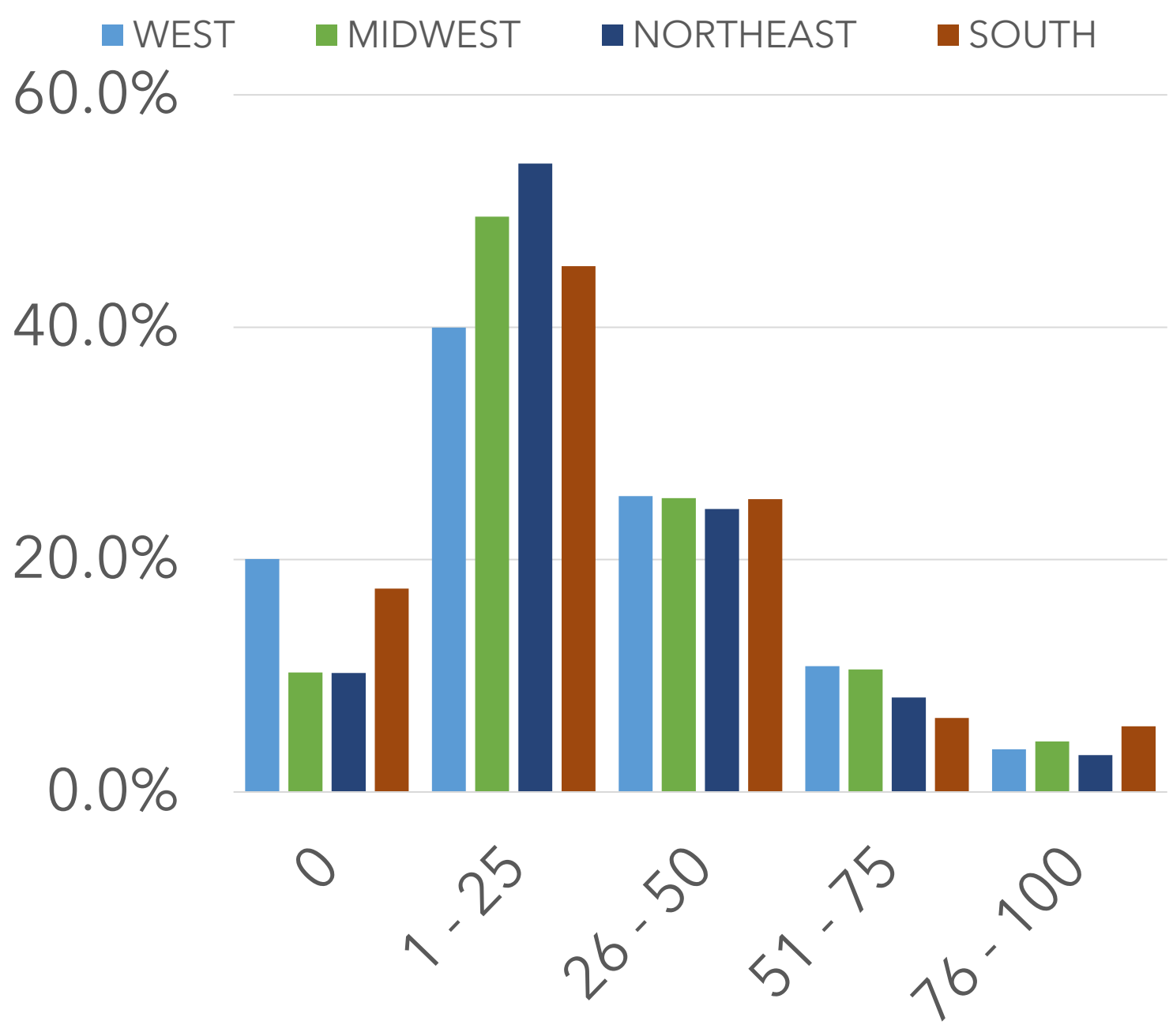


## Percent Potentially Marketable (Index Above 25)

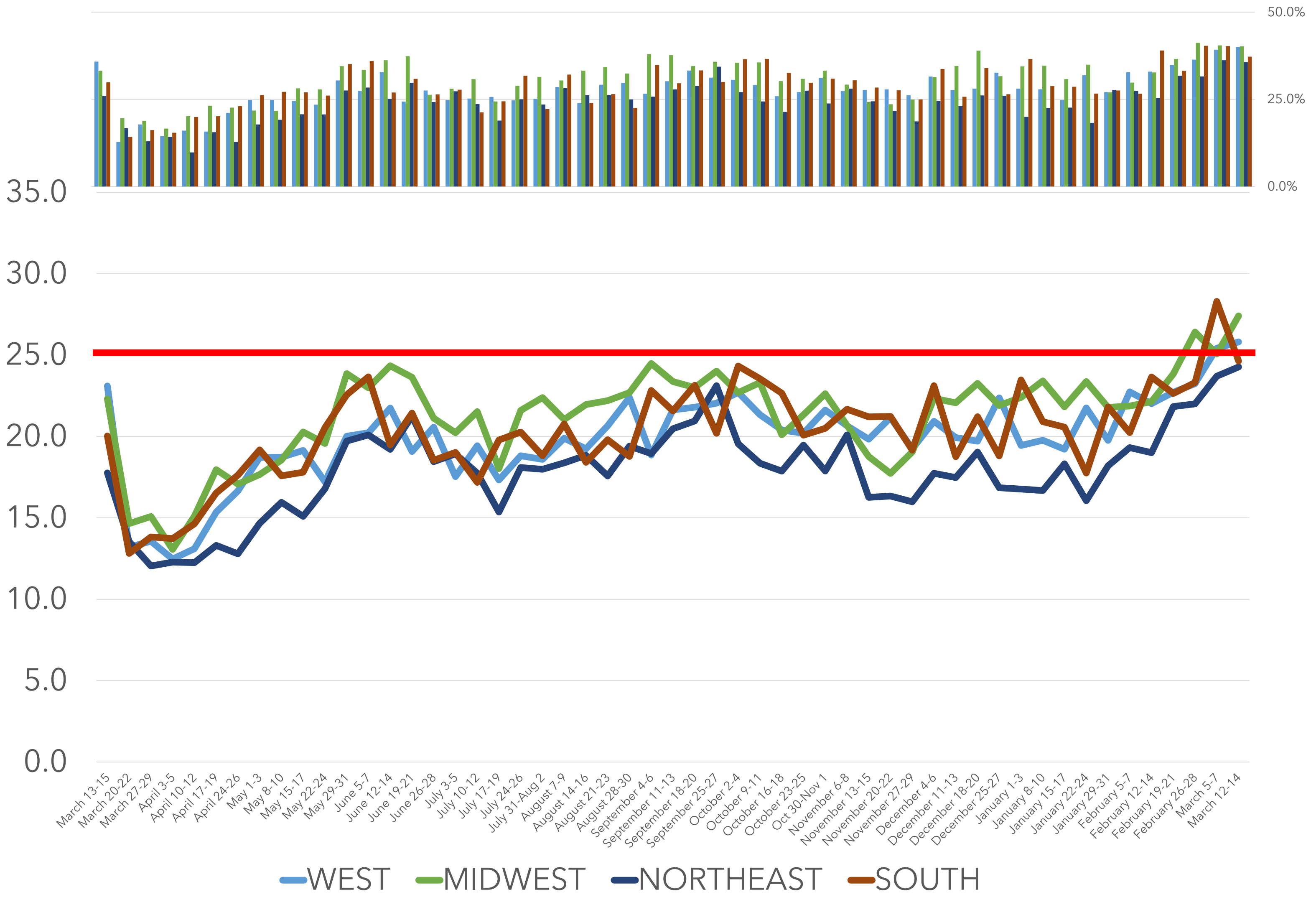


Millennials or younger    Gen X    Boomer or older

# US Regions

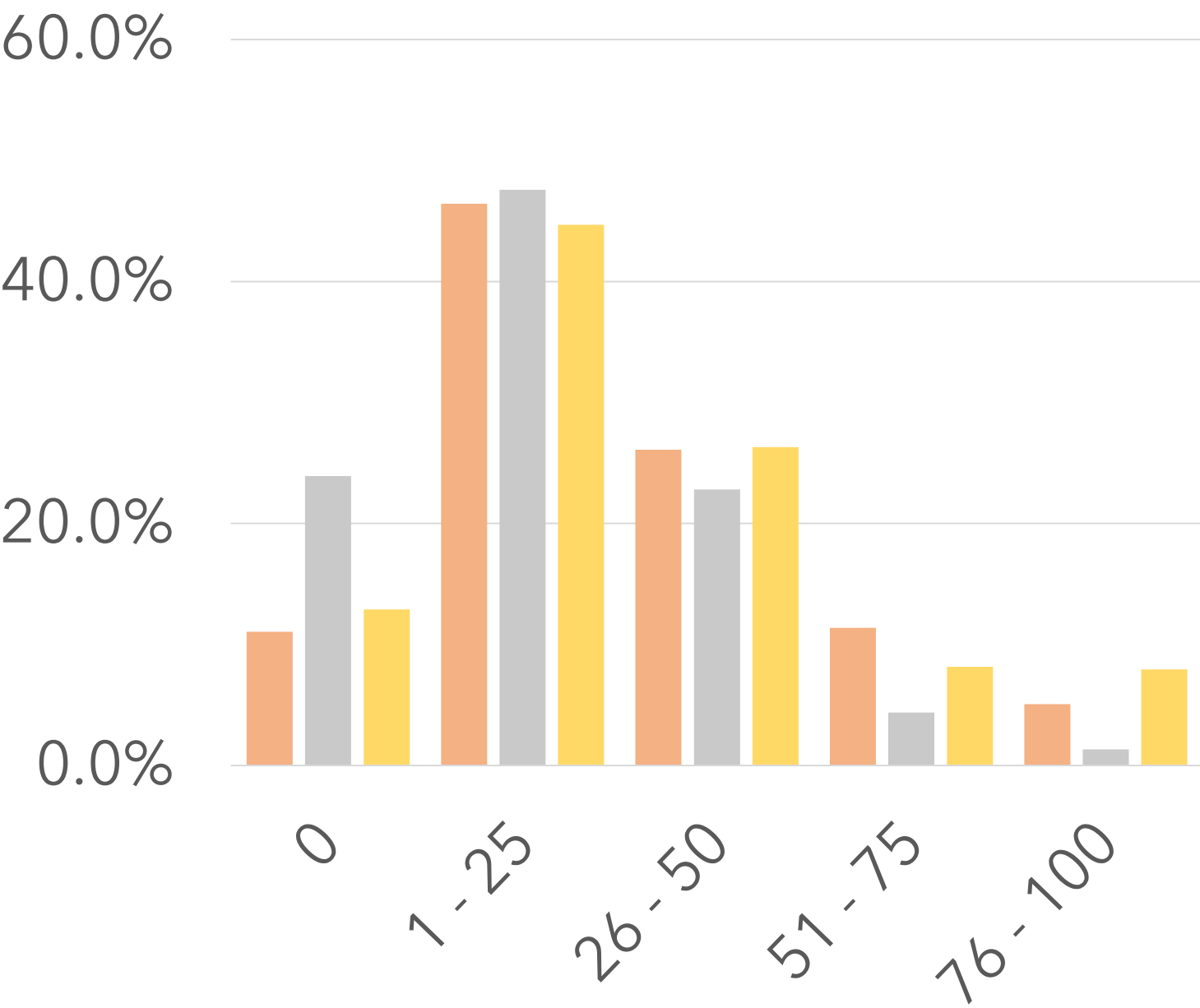


## Percent Potentially Marketable (Index Above 25)

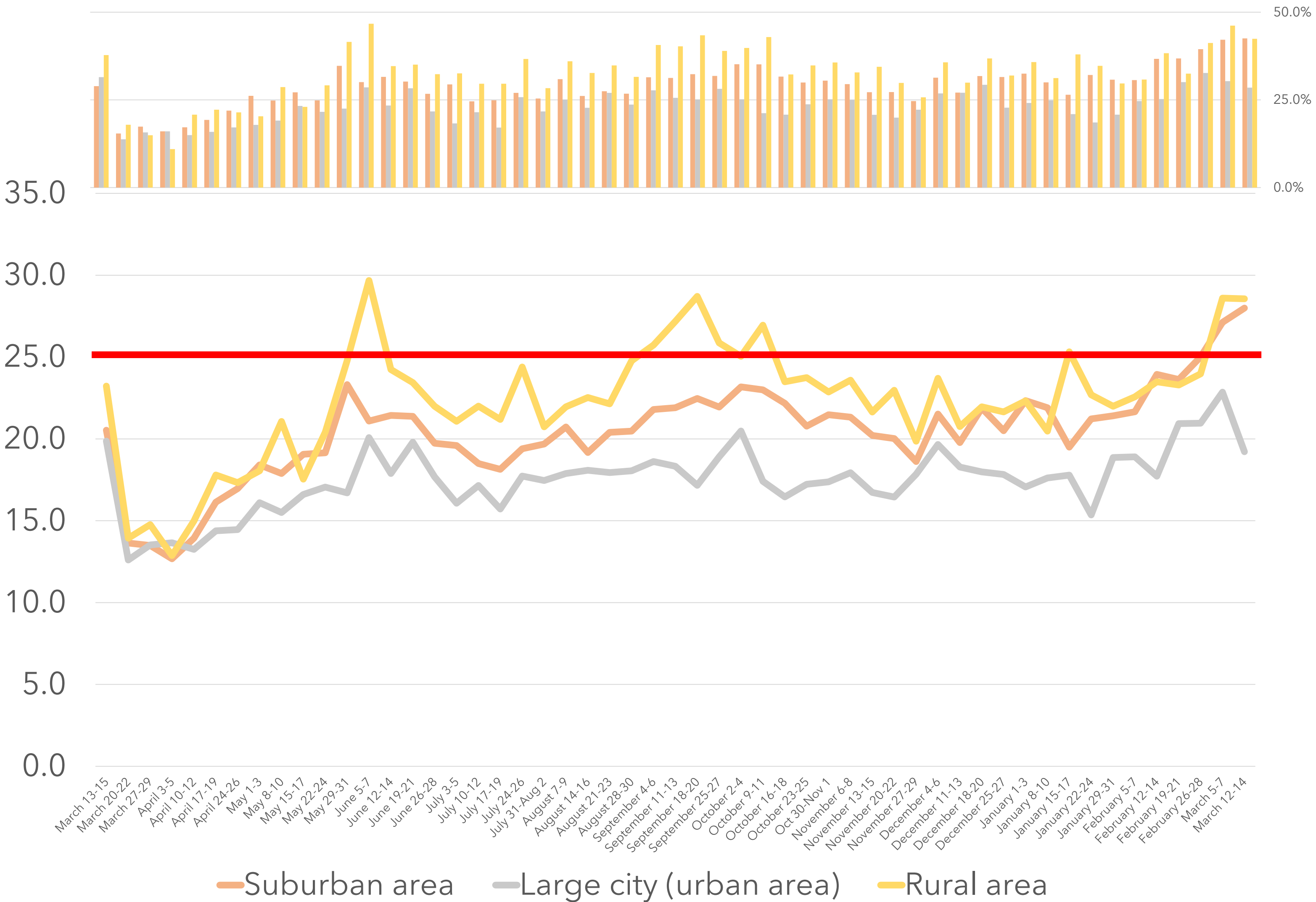


# Residence Type

Suburban area   Large city (urban area)   Rural area

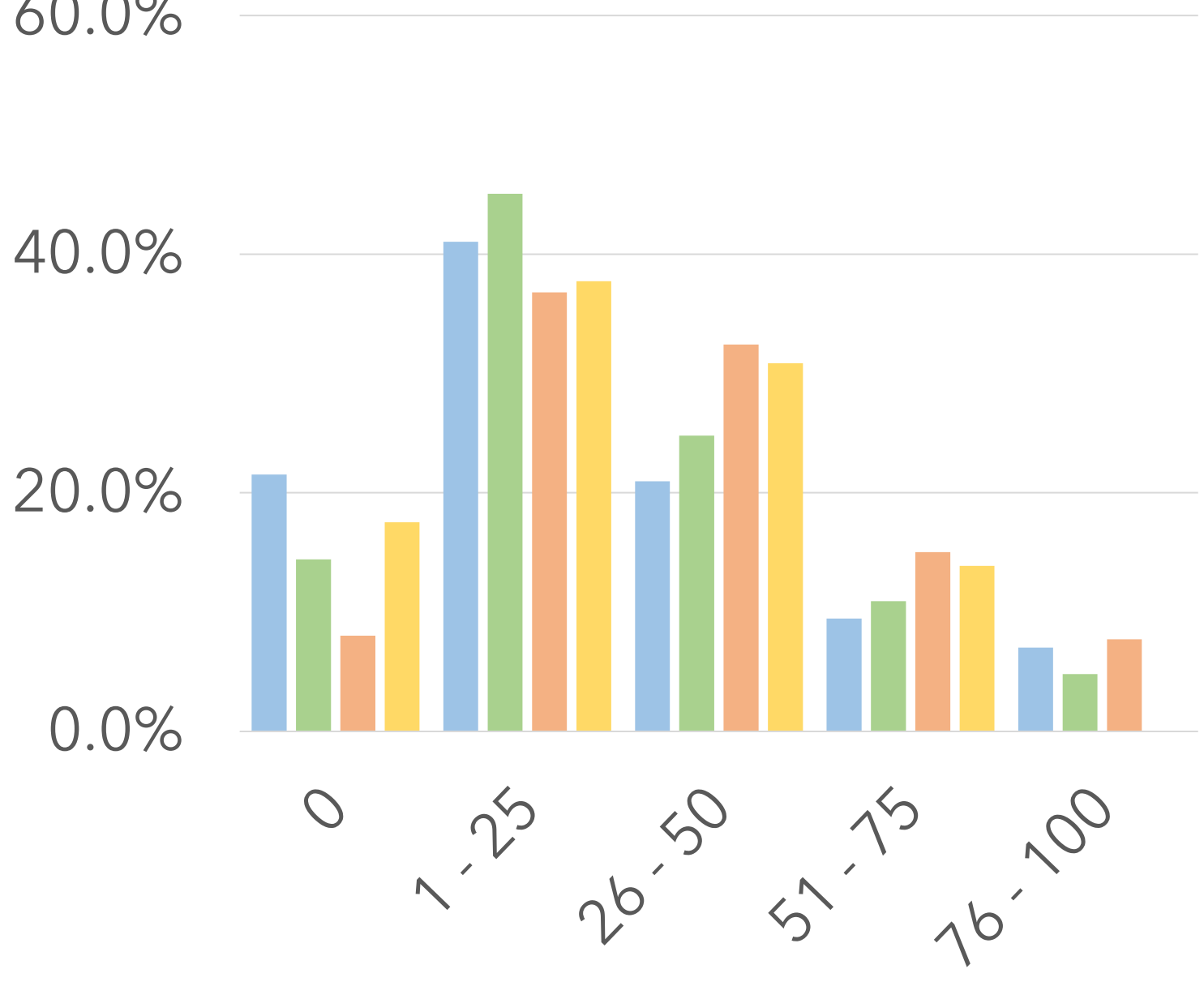


## Percent Potentially Marketable (Index Above 25)

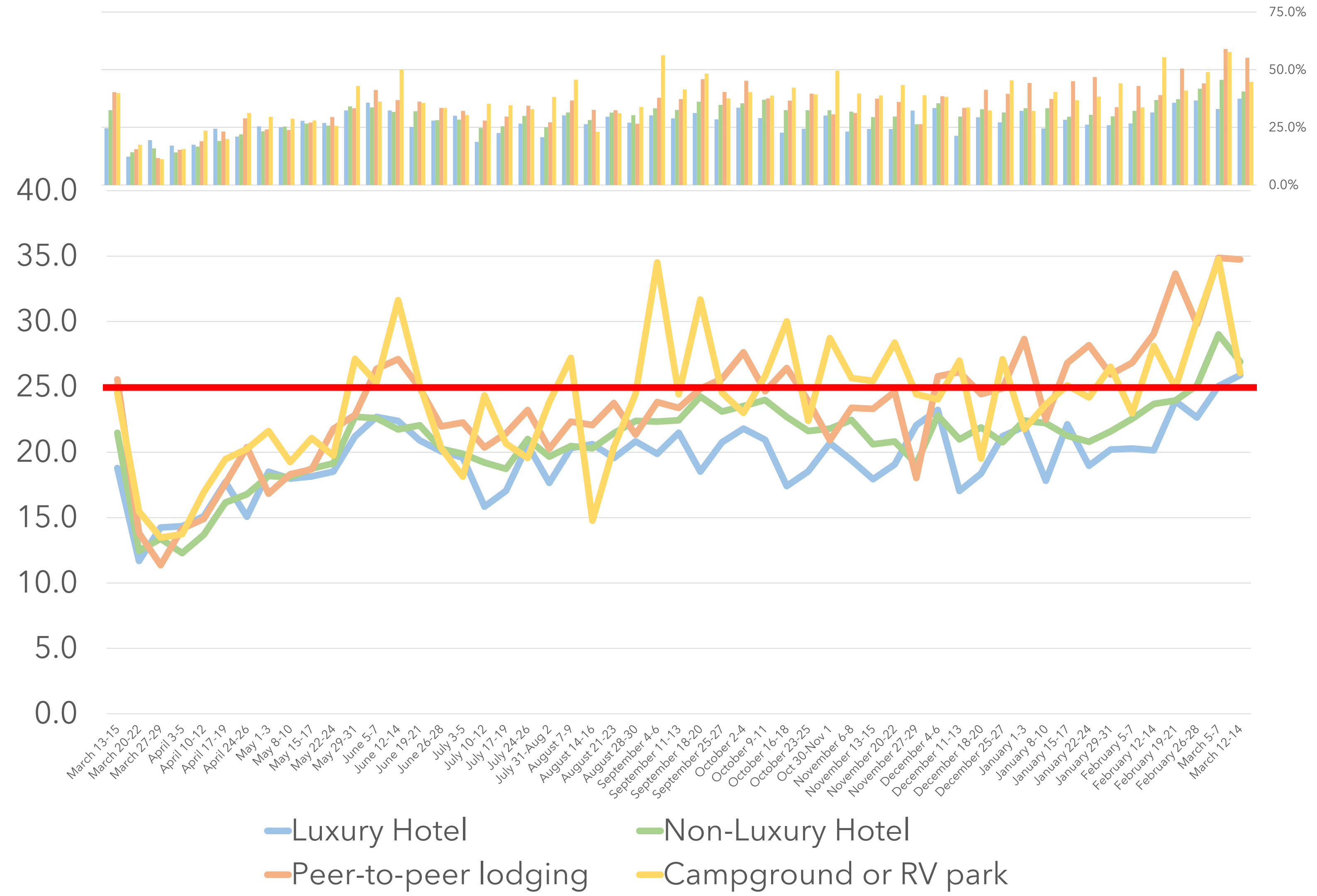


# Lodging Preference

■ Luxury Hotel
 ■ Peer-to-peer lodging
 ■ Non-Luxury Hotel
 ■ Campground or RV park



## Percent Potentially Marketable (Index Above 25)





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

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