DESTINATION ANALYSTS? CORONAWIRUS TRAWEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF March 1st, 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.

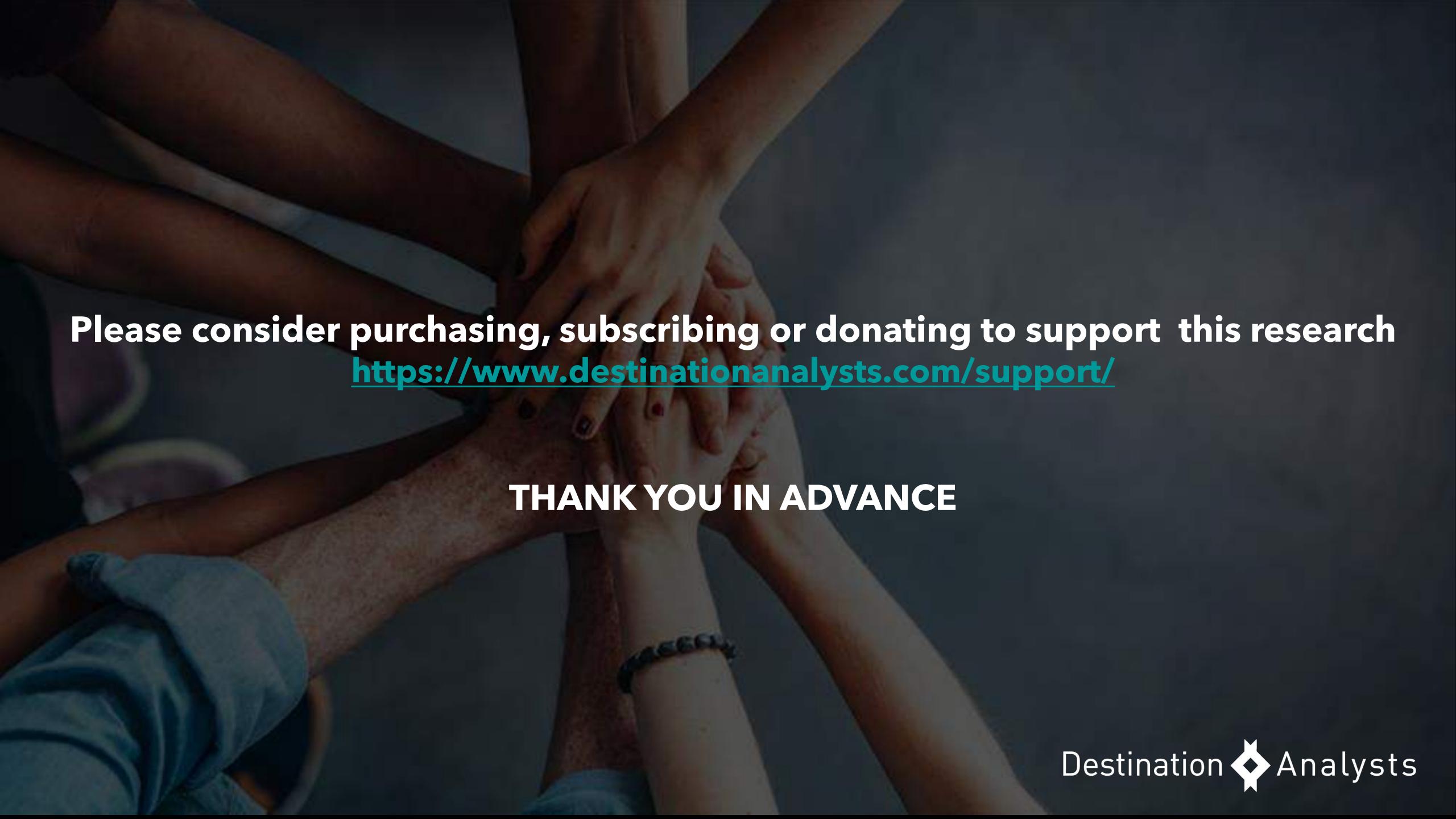
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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 discussion with a stellar panel of renowned agencies that work with industries ranging from tourism and hospitality to technology, consumer products, and more. Tune in to hear how they're communicating with consumers right now and how they define success in the current environment.

Sign up to attend the webinar on Tuesday, March 2<sup>nd</sup> at 11:00am ET here.



## National Anxiety in Decline

It appears Americans believe that the light at the end of the tunnel is getting close.

concerns about contracting the virus and the financial impact of the pandemic. Meanwhile, optimism about the course the coronavirus situation will take in the next month reached another record high, with 49.1% feeling things will get better and just 13.7% feeling it will get worse.

This is a marked change from the start of the year, when 55.9% of Americans were pessimistic and only 20.9% were hopeful about the coming weeks.

#### NATIONAL ANXIETY IN DECLINE:

#### JANUARY-FEBRUARY 2021

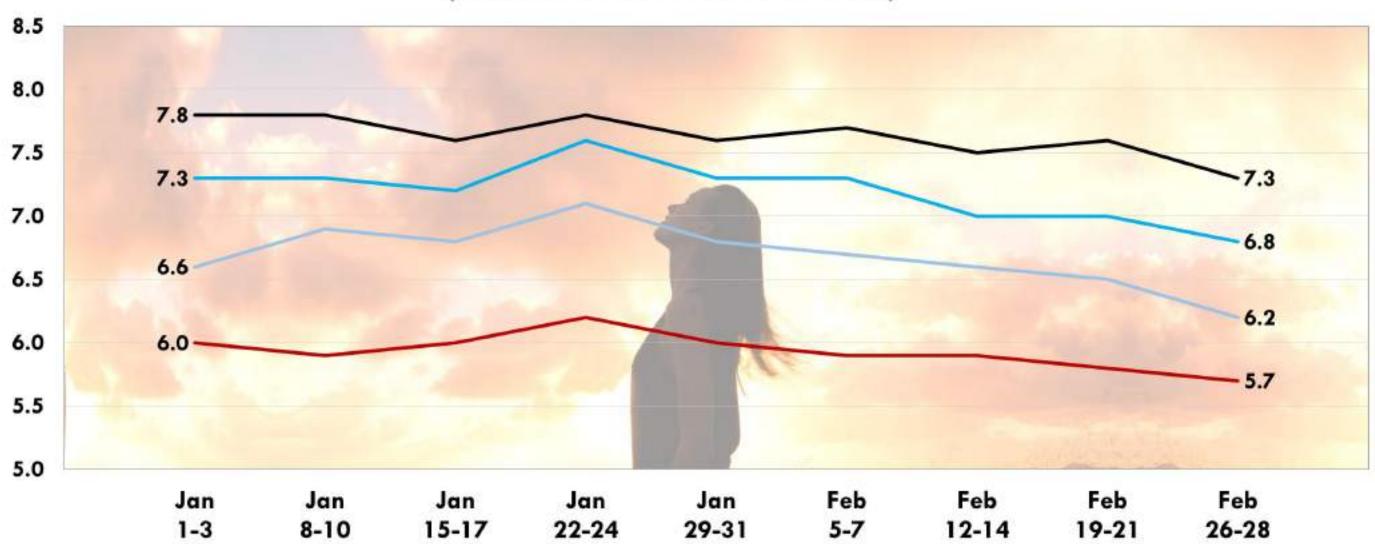








(AVERAGE SCORE ON AN 11-POINT SCALE)



Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the/your \_\_\_\_\_\_?



## How Unsafe Do Americans Still Feel About Travel Activities?

Americans are feeling safer both at home--48.2% are comfortable going out for leisure in their own communities, nearing where we were March 15th, 2020--and with travel. The average rating of the more than two dozen travel activities we track as unsafe reached another pandemic record low, at 43.2%. Less than half of American travelers are feeling flying on airplanes, dining in restaurants, visiting museums and attractions, shopping and staying in hotels and other lodging are unsafe. Although a majority still feel unsafe with international travel and conventions/large group meetings, the proportions avoiding conventions (58.5%) and international travel (67.1%) are at record lows. Nearly two-thirds feel at least somewhat confident they can travel safely right now and travel guilt fell to 39.9%. Americans remain highly open to travel inspiration and another pandemic record 63.9% are in a travel readiness state-of-mind.

#### HOW UNSAFE DO AMERICANS STILL FEEL ABOUT TRAVEL ACTIVITIES?

AS OF FEBRUARY 28, 2021

#### A MAJORITY NO LONGER FEEL UNSAFE WITH:



Traveling in a

taxi/Uber/Lyft

Sporting Events -Small venue (49.1%)



Traveling on a commercial airline (48.2%)



Visiting indoor attractions (41.5%)



Staying in an Airbnb or home rental (39.0%)

Visiting an

observation deck

(31.8%)



Intercity bus travel (59.5%)

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Attending a conference

or convention

(55.5%)



Attending a (56.3%)



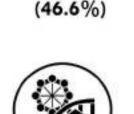
Go to a



Sporting events -Large venue



- e.g., AMTRAK)



Visiting outdoor attractions (36.8%)

Visiting friends

and relatives

(23.9%)



Traveling for

business reasons

(42.6%)

Dining in a restaurant (34.5%)

Going

shopping

(20.2%)



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Staying in

a hotel

(32.3%)

Non-team outdoor recreation (16.3%)



Taking a road trip (15.1%)

#### A MAJORITY STILL FEEL UNSAFE WITH:



Traveling on a cruise line (61.8%)



Traveling outside the **United States** (60.3%)



Traveling by bus or motor coach on a group tour (59.9%)



performance



(56.0%)



casino (54.1%)



Train travel (intercity travel (51.8%)

Question: At this moment, how safe would you feel doing each type of travel activity? (Select all that apply)

(Base: Wave 51 data. All respondents, 1,204 completed surveys. Data collected February 26-28, 2021)



### Travel Plans Due to COVID-19 Vaccines

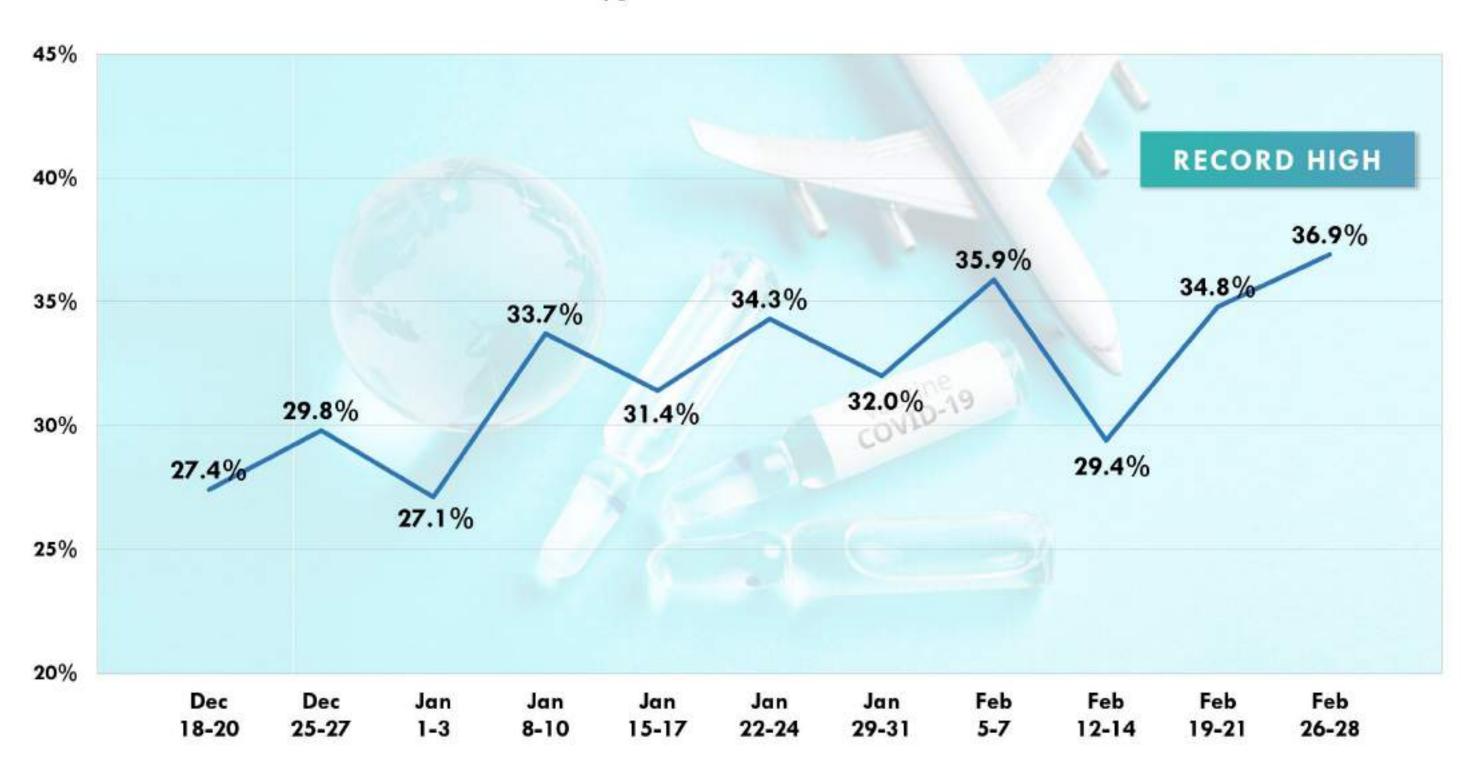
Looking at the COVID vaccine's role in travel sentiment, a majority of Americans continue to say that the vaccines make them optimistic about traveling safely and life returning to normal in the next 6 months.

63.3% of American travelers have themselves or know someone who has already received a vaccine. In fact, over one-third of Baby Boomer travelers report they have already received their COVID-19 vaccine. Now a record 36.9% of American travelers—including 41.6% of Millennial age traveler—have made travel plans specifically in anticipation of more widespread vaccination.

#### TRAVEL PLANS DUE TO COVID-19 VACCINES

DECEMBER 18, 2020 - FEBRUARY 28, 2021

% WHO SAY YES



Question: Have you begun planning (or booking) any future travel in anticipation of the COVID-19 vaccine being widely available? (Select one)

(Base: Waves 41-51 data. All respondents, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210 and 1,204 completed surveys.)



## Will Travel for Leisure in Next 3 Months

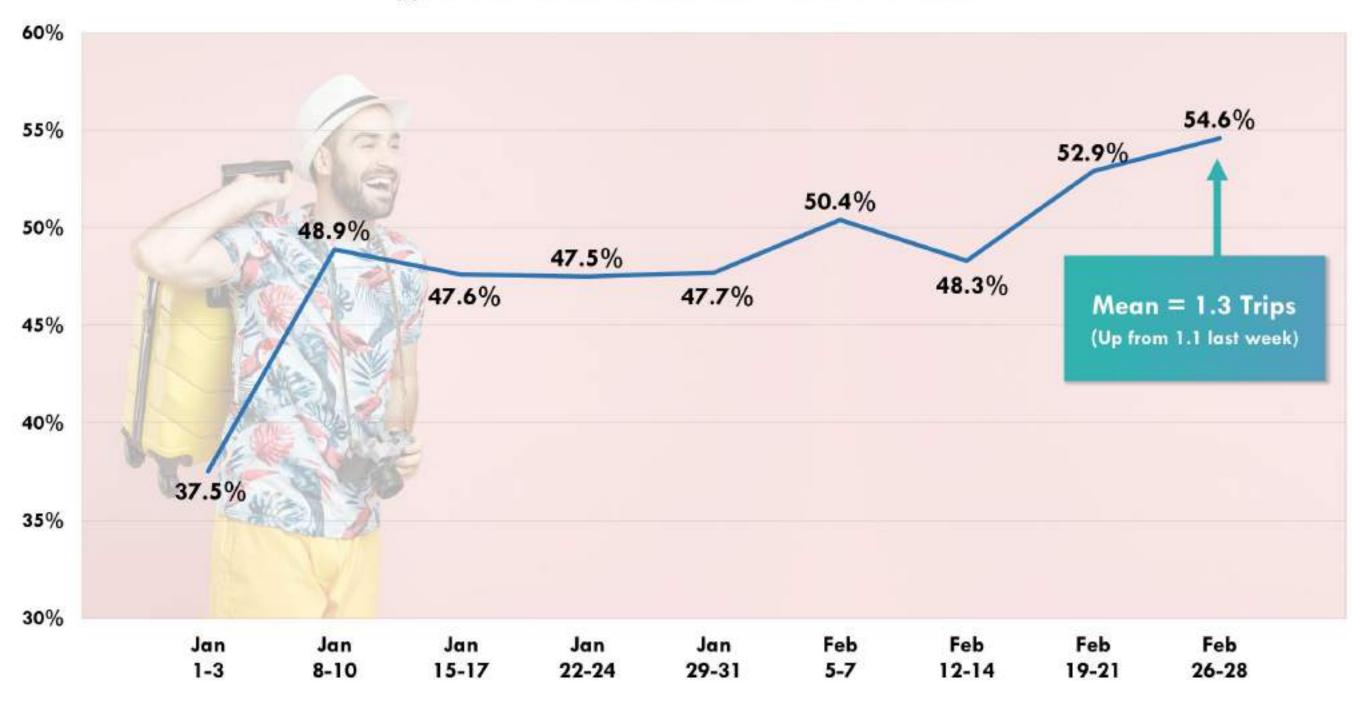
#### Trips and travel plans keep growing.

Over 60% of American travelers did some kind of travel dreaming and/or planning in the last week alone, including 15.1% who made travel reservations. A growing percentage of American travelers say they will be taking at least one leisure trip in the next three months—now at 54.6%. More than 84% already have tentative trip plans for the remainder of 2021, with June through October the peak months for trips. While many trips will remain regional for the short-term, a quarter of American travelers will take their next commercial air trip by June. Escaping stress and spending time with family remain the primary motivators for travel.

#### WILL TRAVEL FOR LEISURE IN NEXT 3 MONTHS

#### JANUARY - FEBRUARY 2021

#### % WHO WILL TAKE AT LEAST 1 TRIP



Question: How many leisure trips do you expect to take (even if tentatively) during the next three months?

I expect to take \_\_\_\_\_ leisure trips

(Base: Waves 43-51 data. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210 and 1,204 completed surveys.)



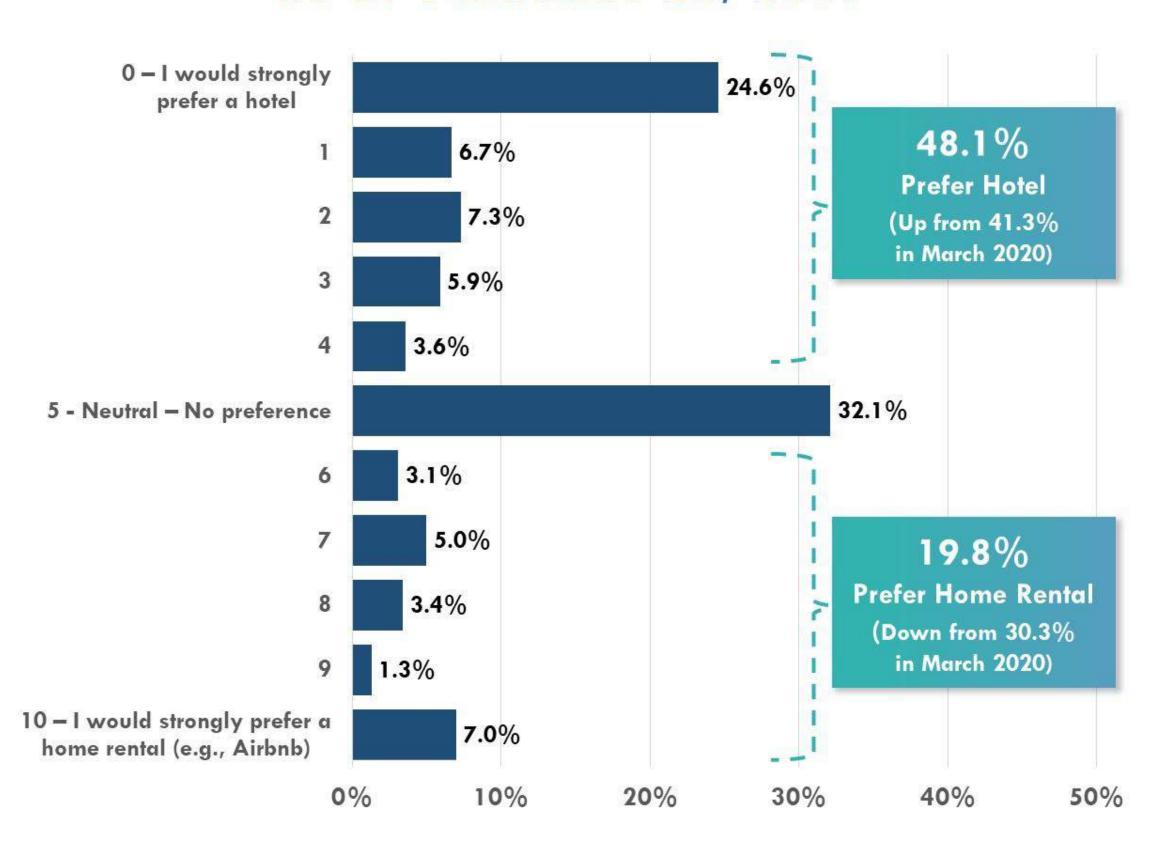
## Preferences for Hotel vs. Home Rental Lodging in the Next 3 Months

Lodging preferences for travel over the next three months appear to have shifted from the early pandemic period.

When asked to imagine that they were traveling at some point in the next few months and if they would generally prefer to stay in a hotel or a home rental through a service like Airbnb, 48.1% had stronger preference for hotel—up from 41.3% in March 2020—while 19.8% showed a strong preference for home rental—down from 30.3% last March.

# PREFERENCE FOR HOTEL VS. HOME RENTAL LODGING IN NEXT 3 MONTHS

AS OF FEBRUARY 28, 2021



Question: Imagine that you were traveling at some point in the next three (3) months. Would you generally prefer to stay in a hotel or a home rental through a service like Airbnb?

(Base: Waves 2 and 51 data. All respondents, 1,200 and 1,204 completed surveys.)



## What's the Plan for Spring Break?

With travel plans slowly but surely growing in the next few months, we looked at the outlook for the Spring Break period.

This week, 12.4% of American travelers said they have a Spring Break trip planned. Interestingly, over two-thirds of these travelers say it's important to them that they experience a new destination for this trip. Half of these Spring Break period travelers plan to use an airplane for their trip and head more than 500 miles away from home. Beach destinations are, of course, popular, as are National Parks and rural areas. Luxury hotels appear to be the most common lodging option for these Spring Break travelers.

(Base: Wave 51 data. All respondents, 1,204 completed surveys and Respondents who have a spring break trip planned. 131 completed surveys. Data collected February 19-21, 2021)



#### WHAT'S THE PLAN FOR SPRING BREAK?

AMERICANS' SPRING BREAK TRAVEL PLANS AS OF FEBRUARY 28TH, 2021

12.4%

53.6%

67.9%

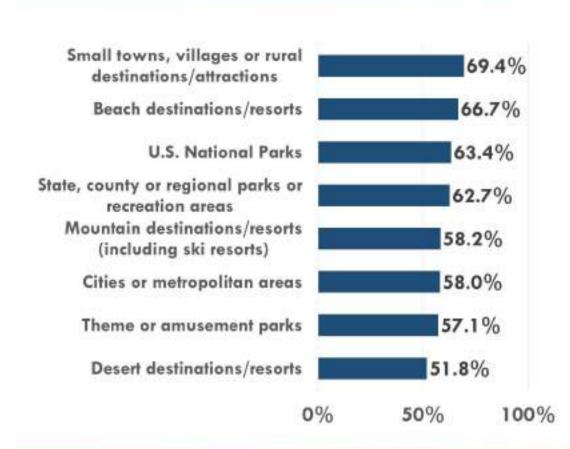
Of American Travelers Have a Spring Break **Trip Planned** 

Of Spring Break Travelers Will Travel over 500 Miles for their Trip

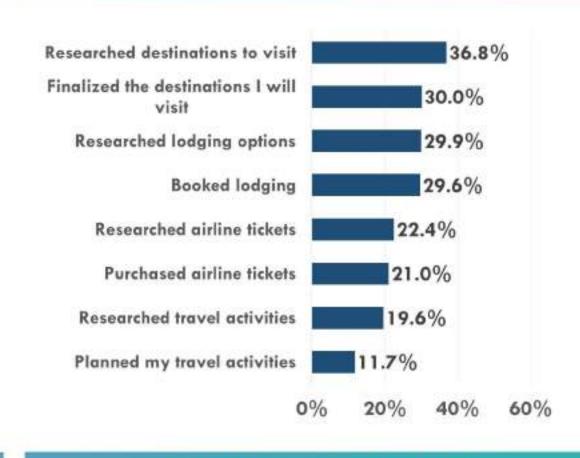
Of Spring Break Travelers say it's Important they Visit a New Destination for this Trip

## **DESTINATION TYPES**

#### (% 'LIKELY' OR 'VERY LIKELY' TO VISIT)



#### PLANNING TASKS COMPLETED



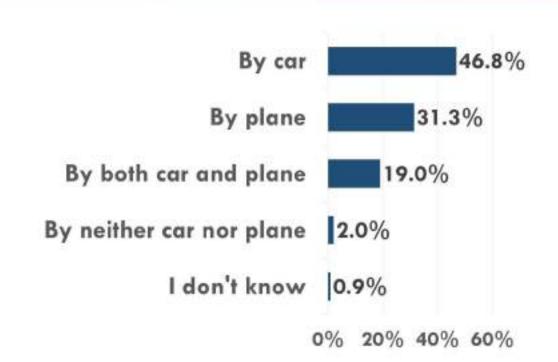
#### WHERE THEY WILL STAY

#### Luxury or 5-star hotel 40.1% Full-service or 3-4 star hotel Vacation home rental Budget hotel or motel 20.9% Bed & breakfast Inn Peer-to-peer lodging 18.1% Time-share property 13.9% Campground or RV park 7.7%

0% 20% 40%

60%

#### **HOW THEY WILL TRAVEL**



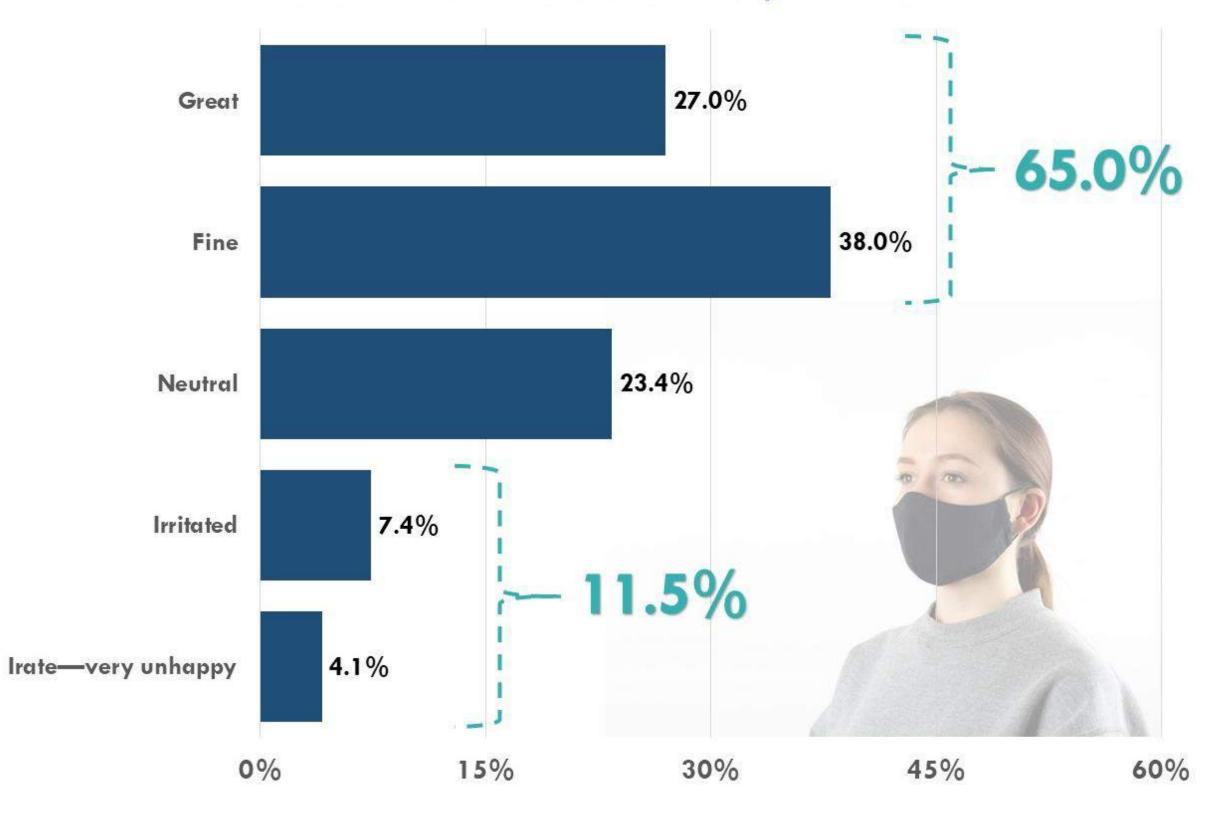
## Feelings on Mask Requirements After Vaccination

Looking towards the conclusion of the COVID-19 pandemic, 71.3% of American travelers will continue to wear masks after they are fully vaccinated. Indeed, nearly half expect it will be 2022 before people will be able to safely stop wearing masks in public.

When asked to imagine how they would feel on their first post-vaccine trip if the place/destination/attraction they were visiting still required masking, 65.0% said they would feel "fine," if not "great."

# FEELINGS ON MASK REQUIREMENTS AFTER VACCINATION

AS OF FEBRUARY 28, 2021



Question: Imagine you have received the COVID-19 vaccine and are taking your first trip post-vaccine.

If the place/destination/attraction you were visiting still required you to wear a mask, how would you feel? (Select one)

(Base: Wave 51 data. All respondents, 1,204 completed surveys. Data collected February 26-28, 2021)



# Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing Highlights from the Week of March 1st



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.

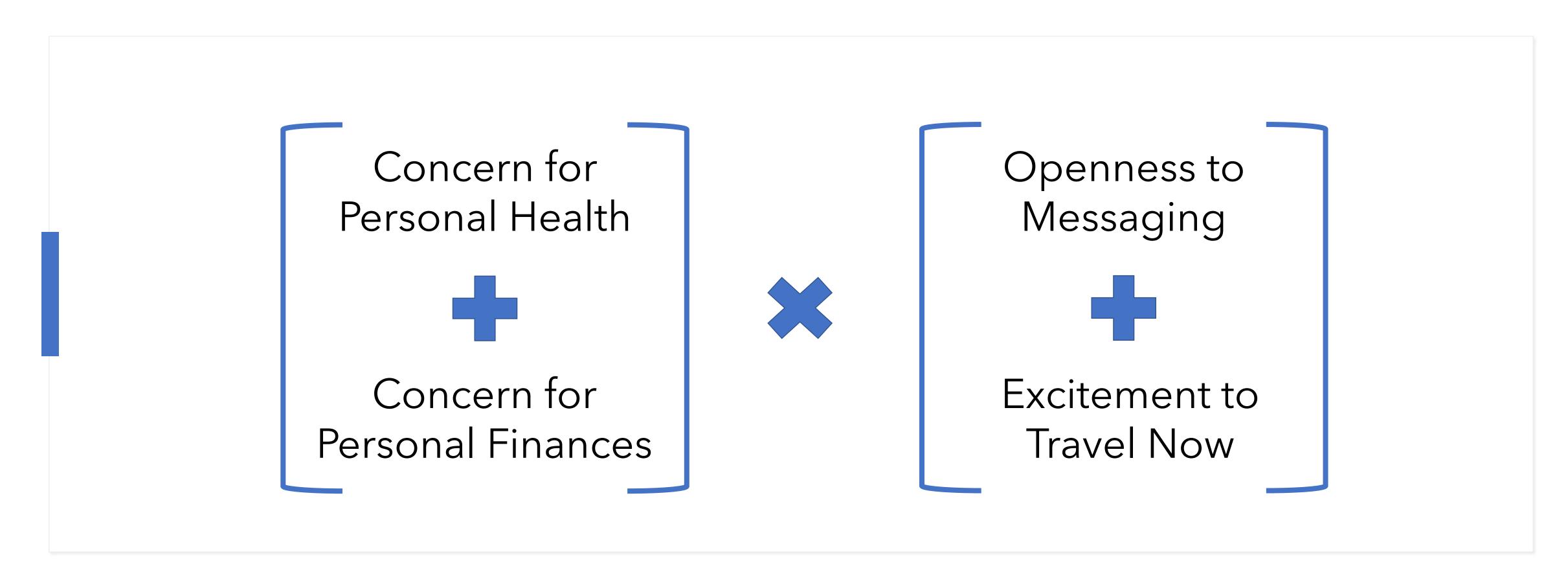


The goals are to identify:

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



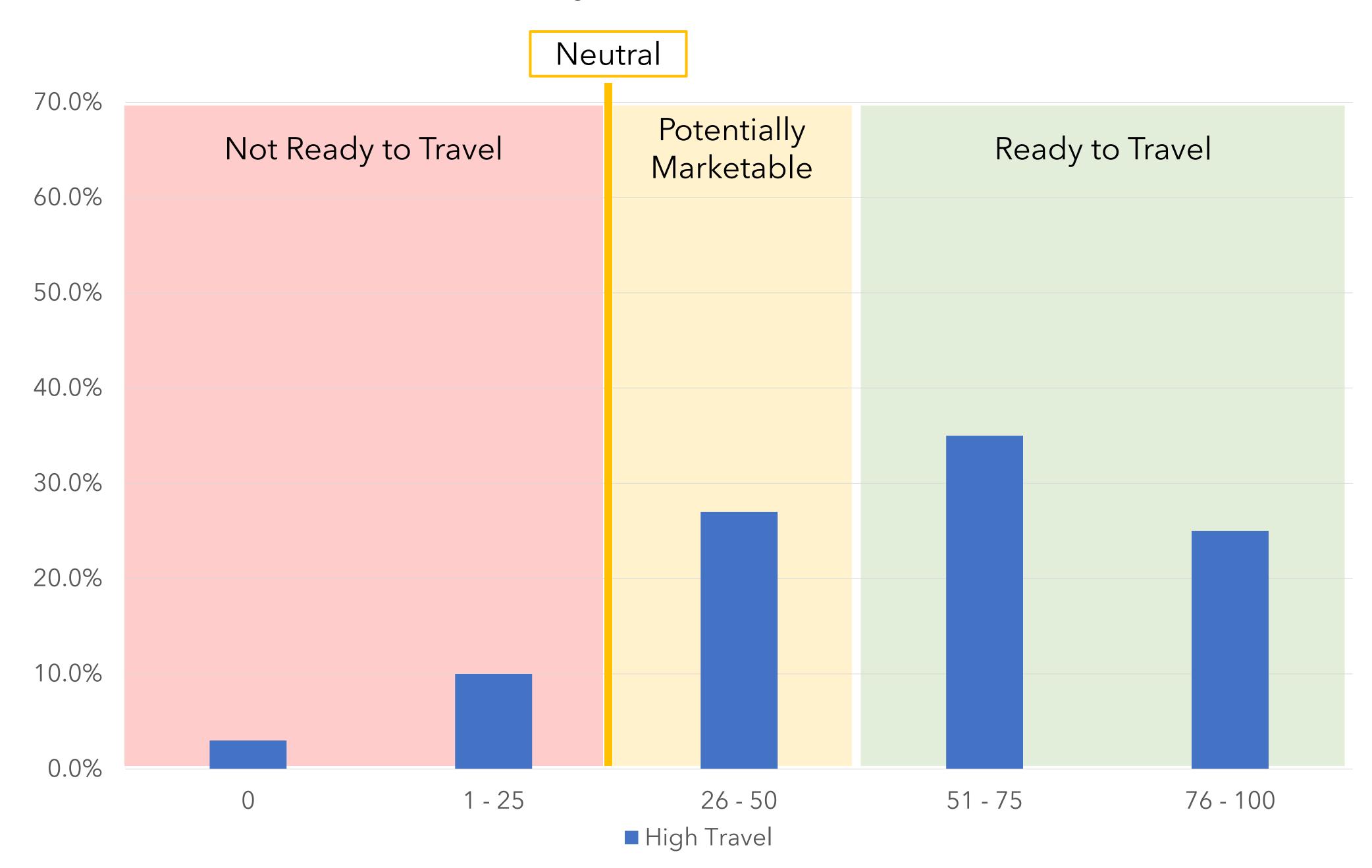
# Predictive Index Formula



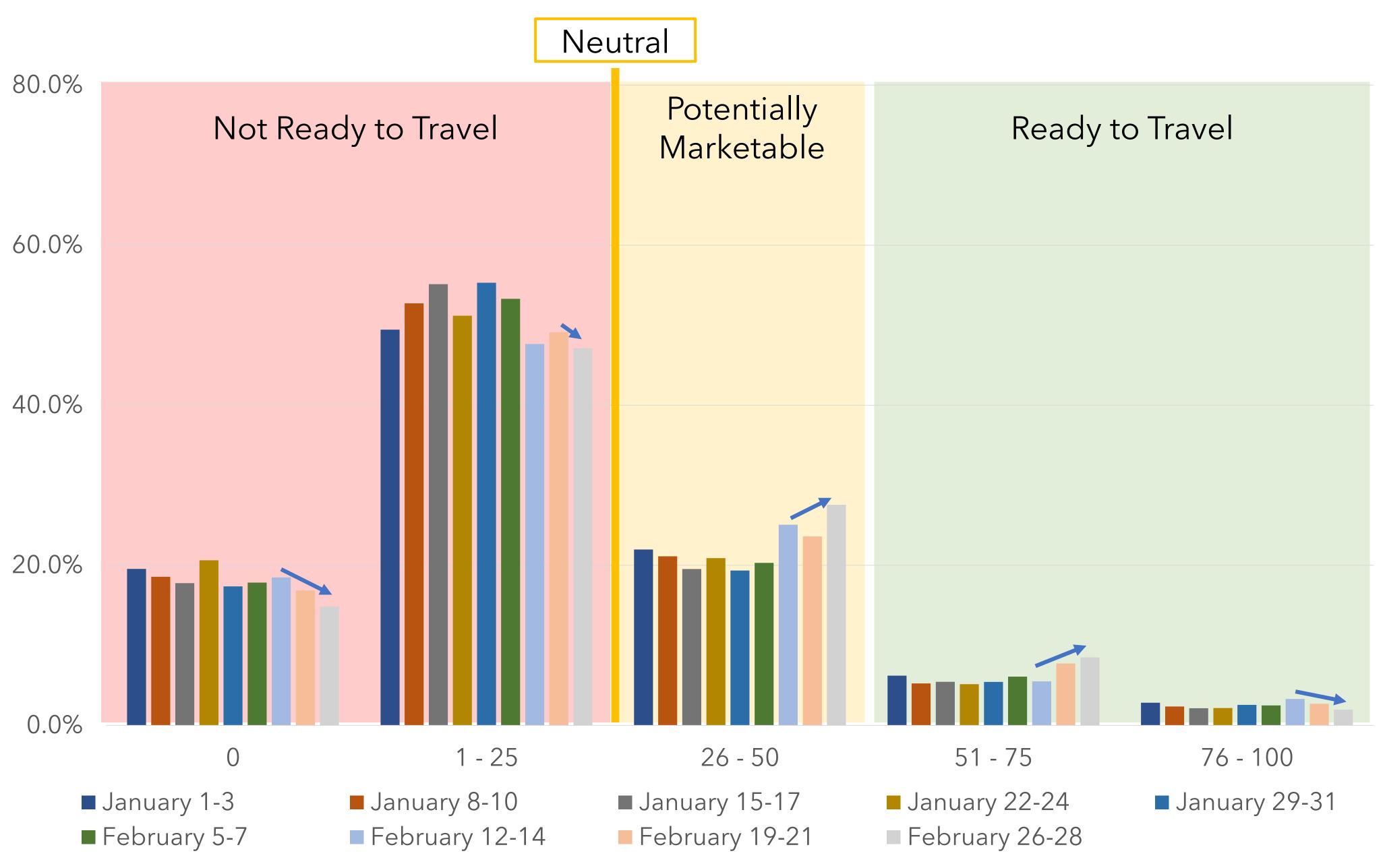
\*Normalized to a 100pt scale

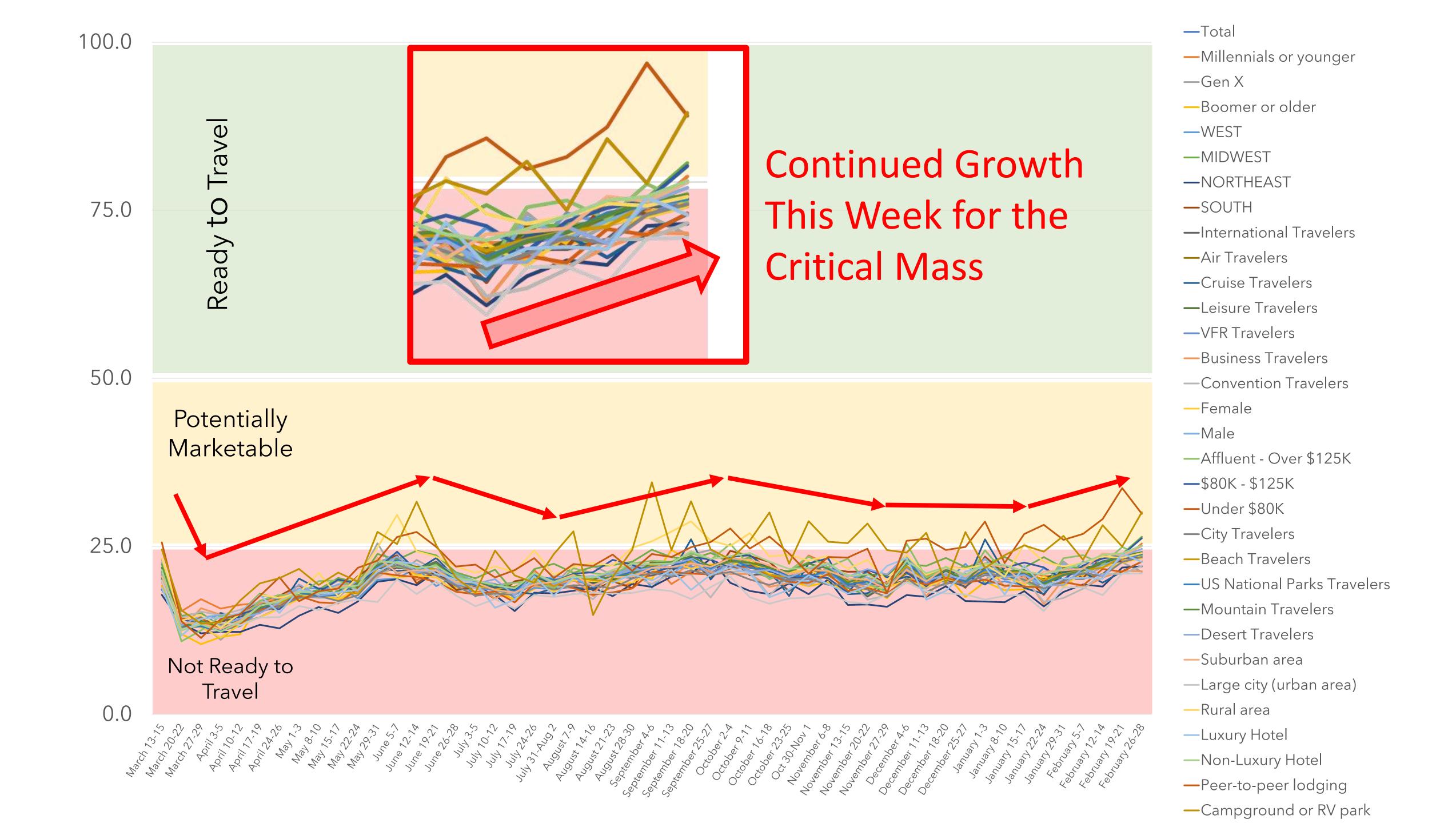


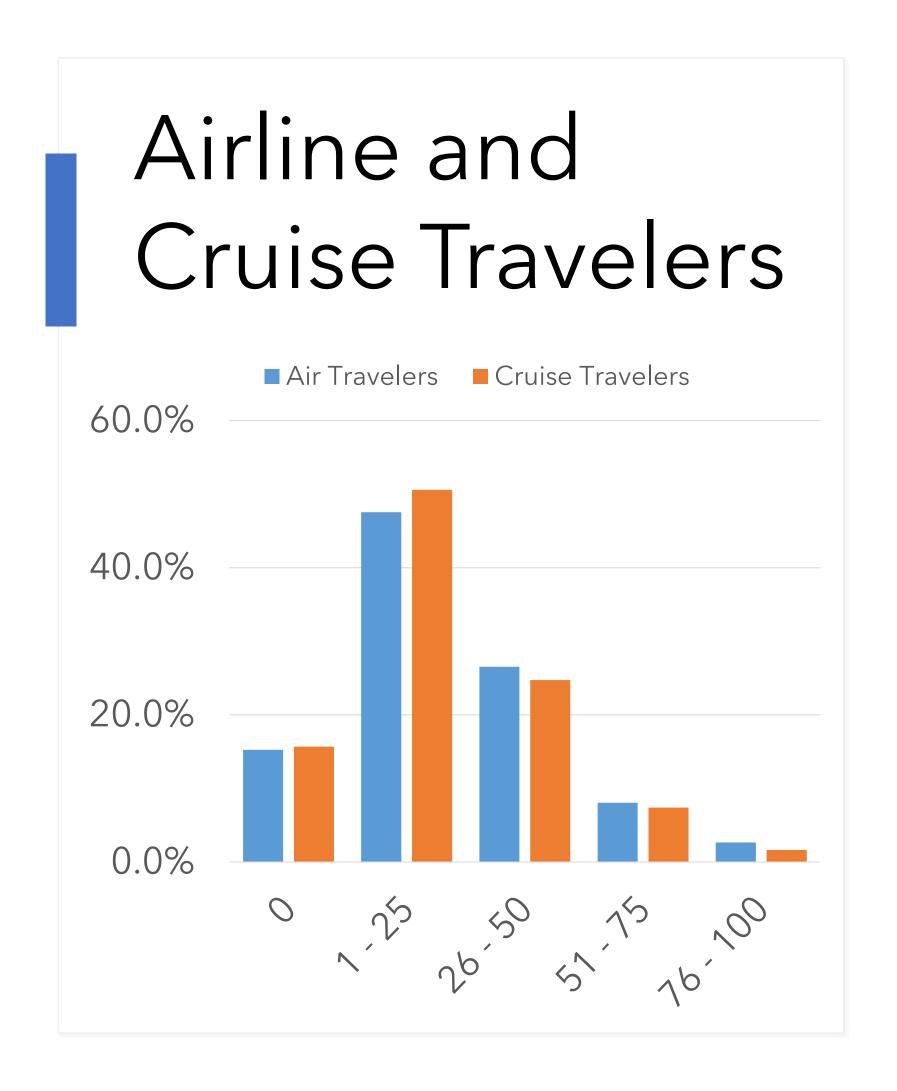
## **Healthy Travel Outlook**

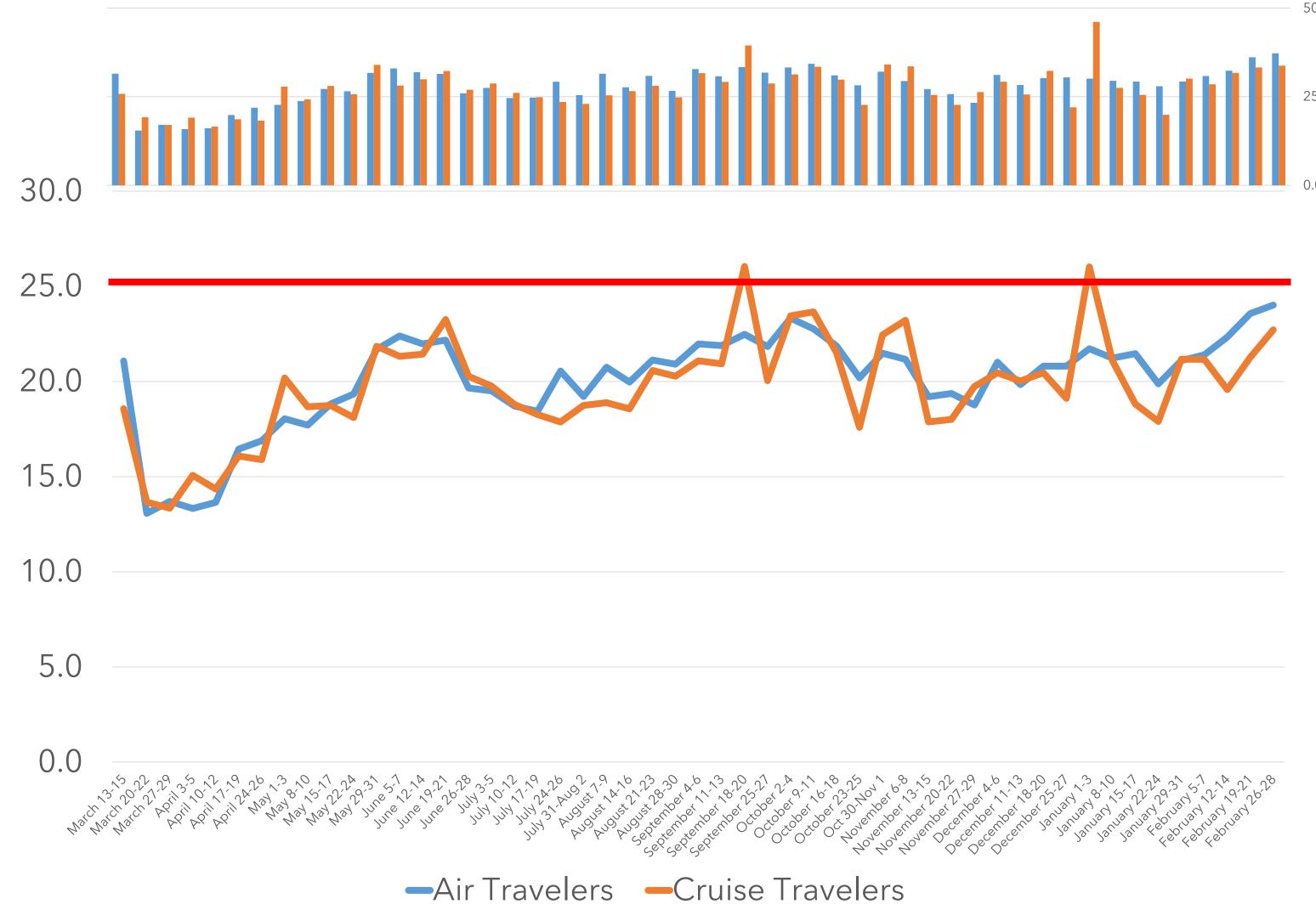


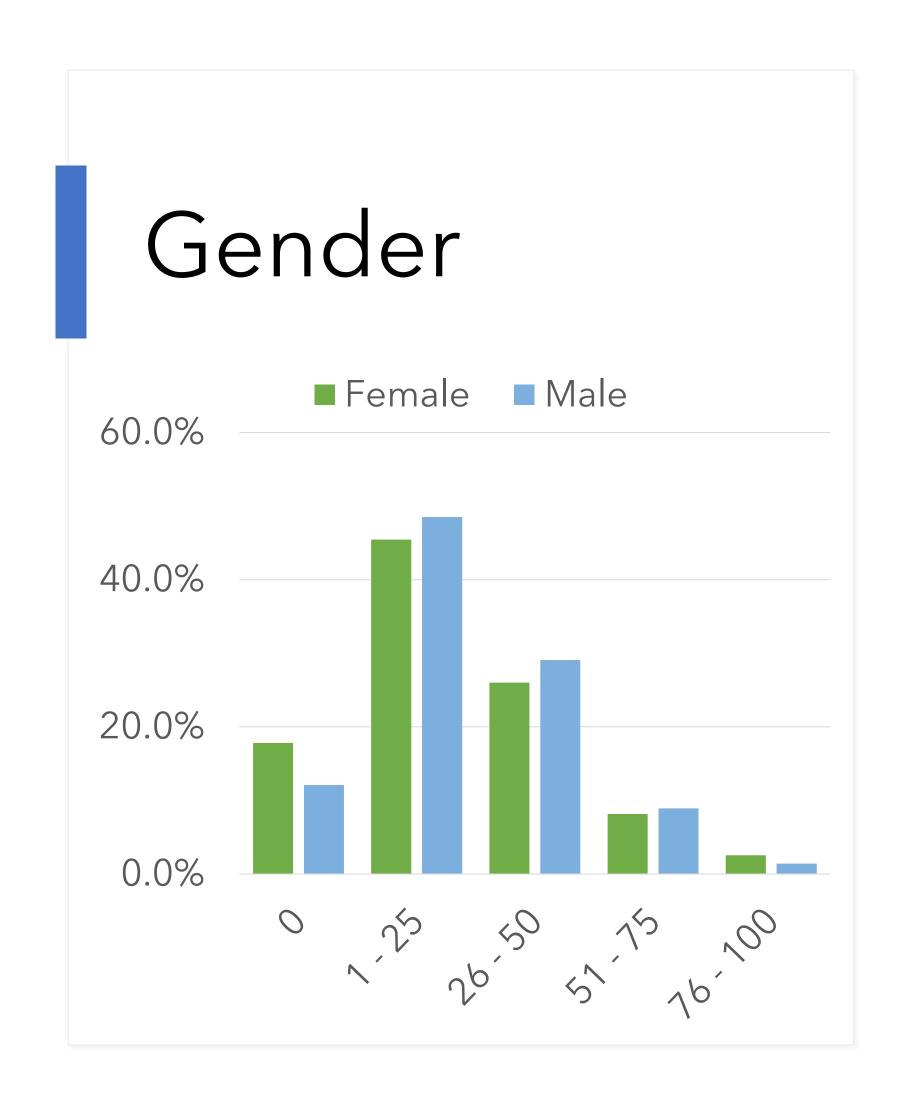
### **Travel Outlook**

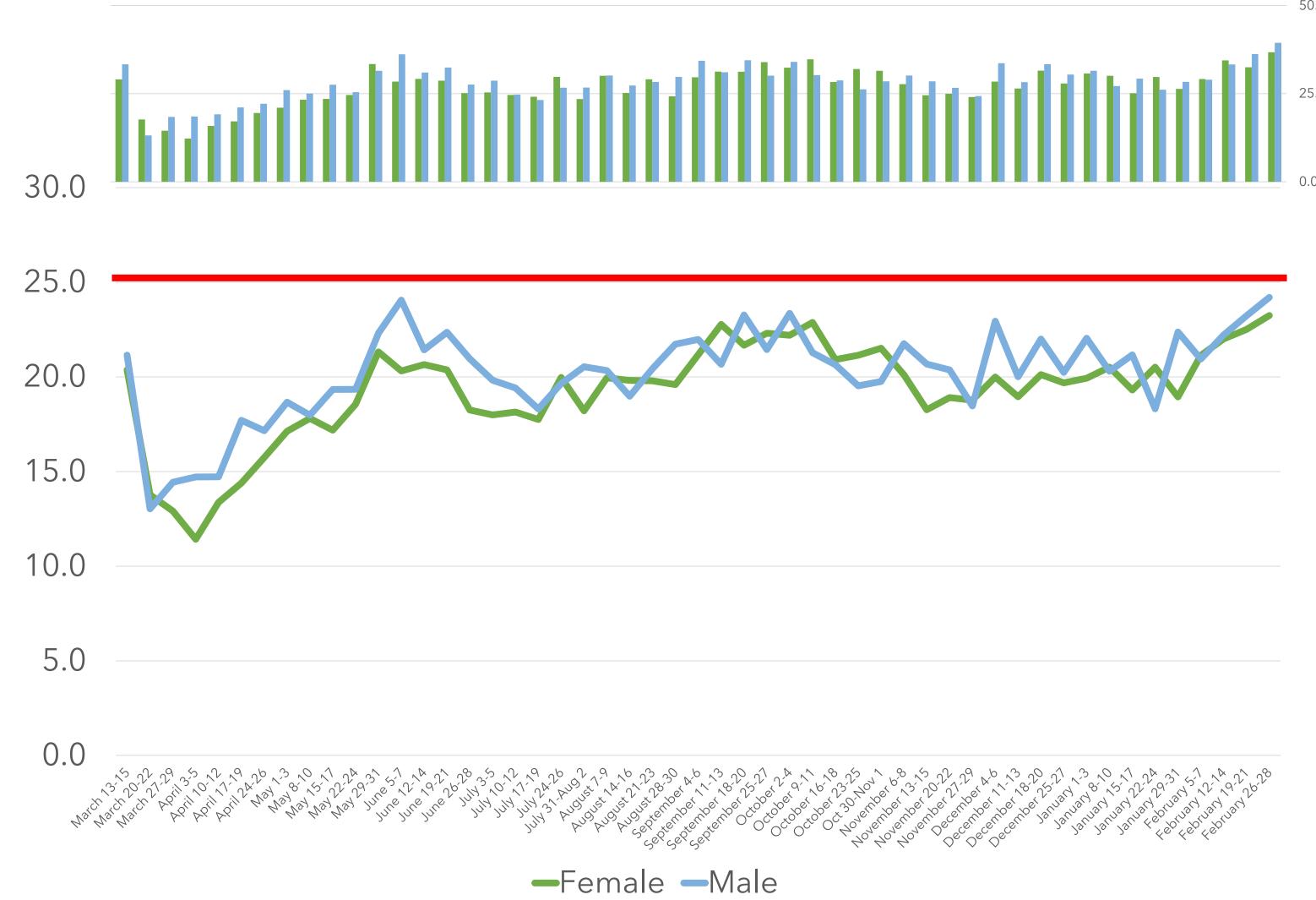


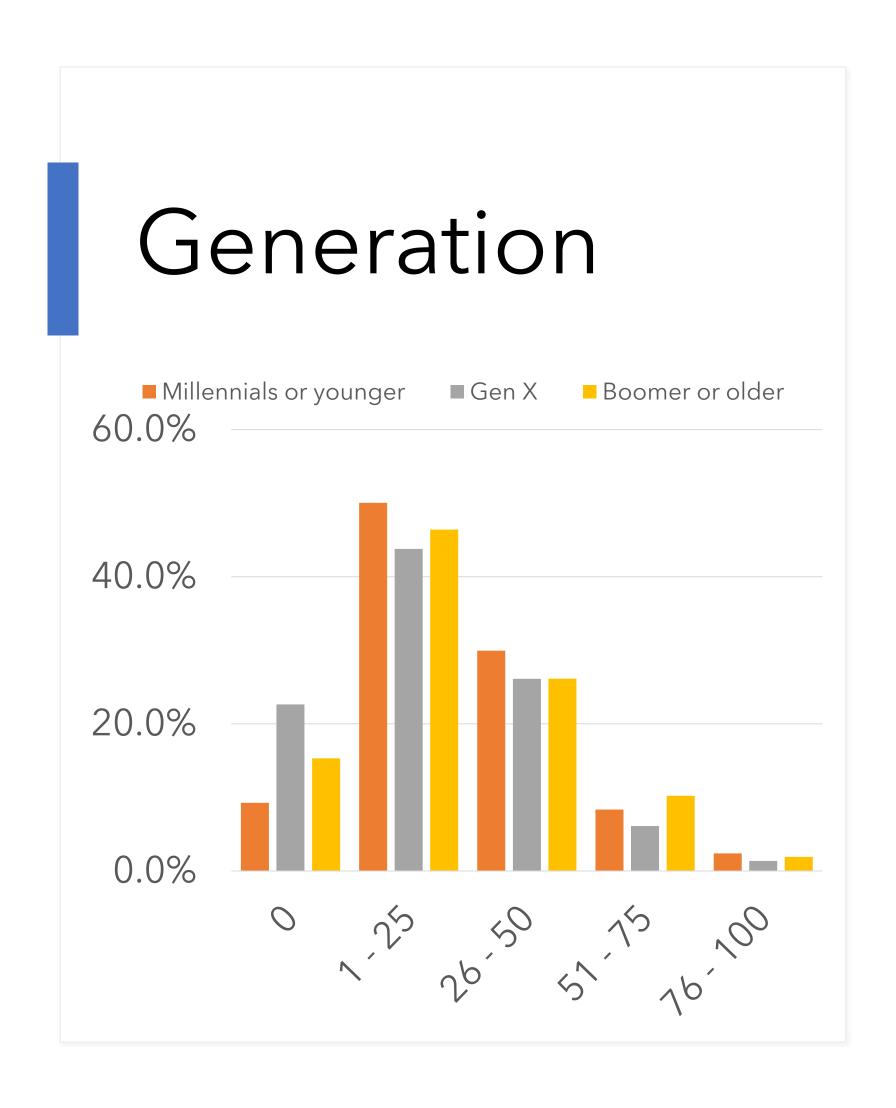


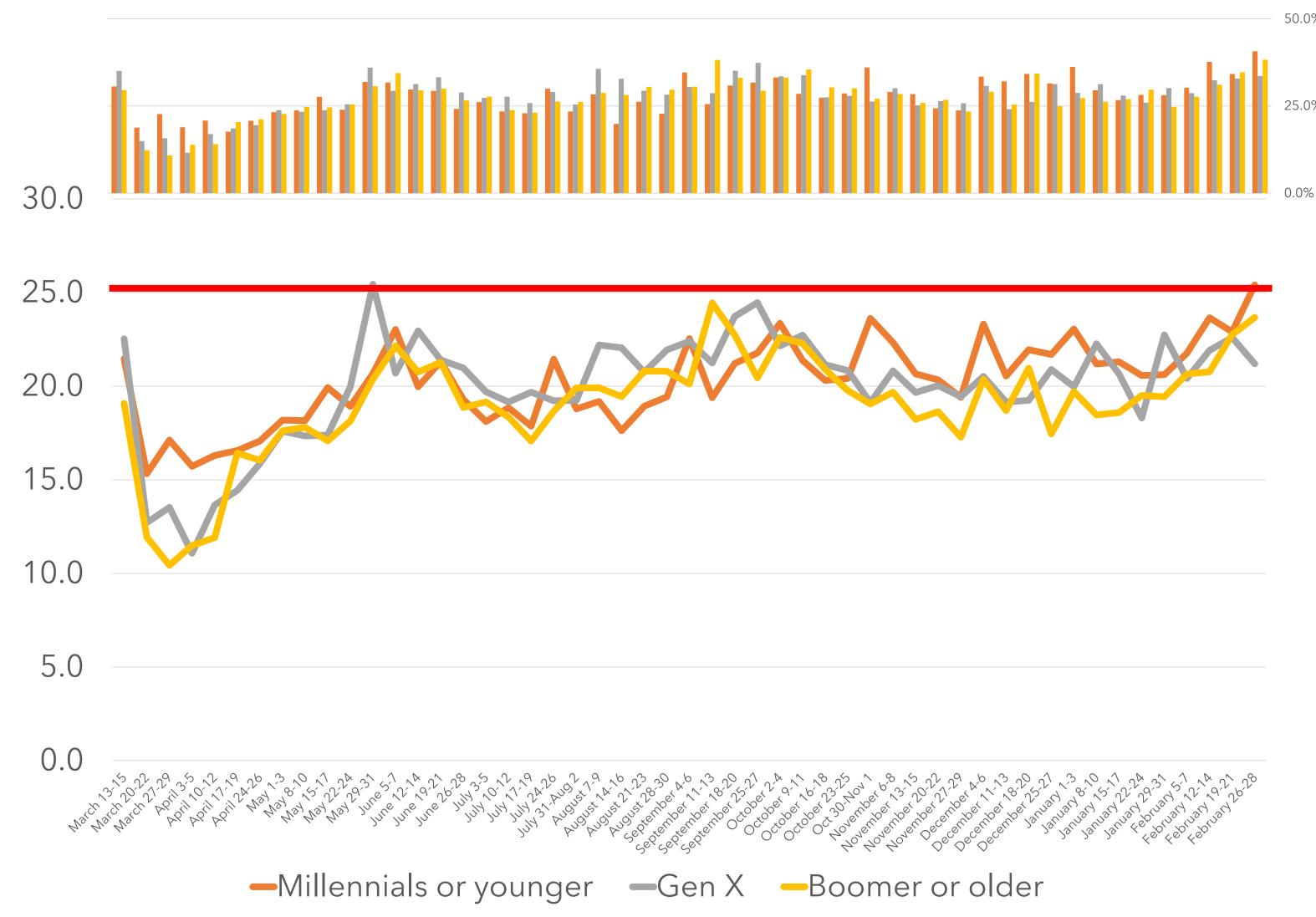


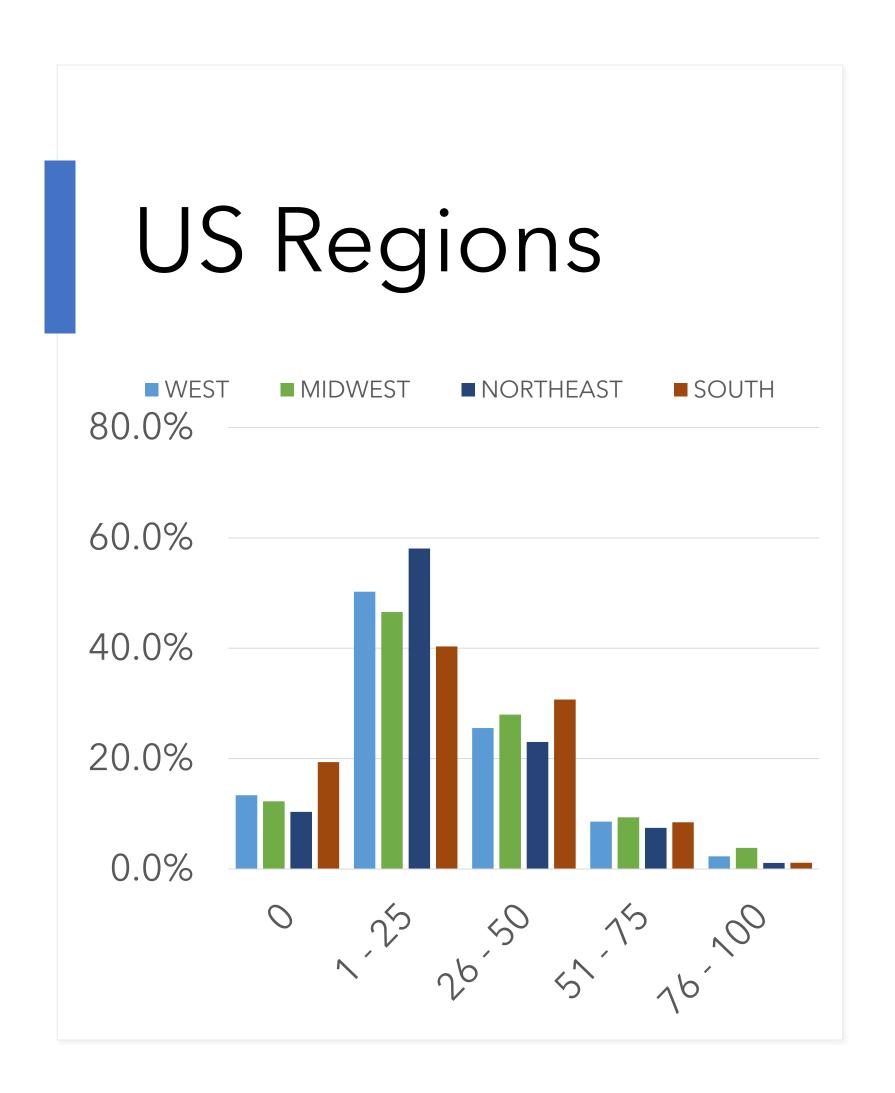


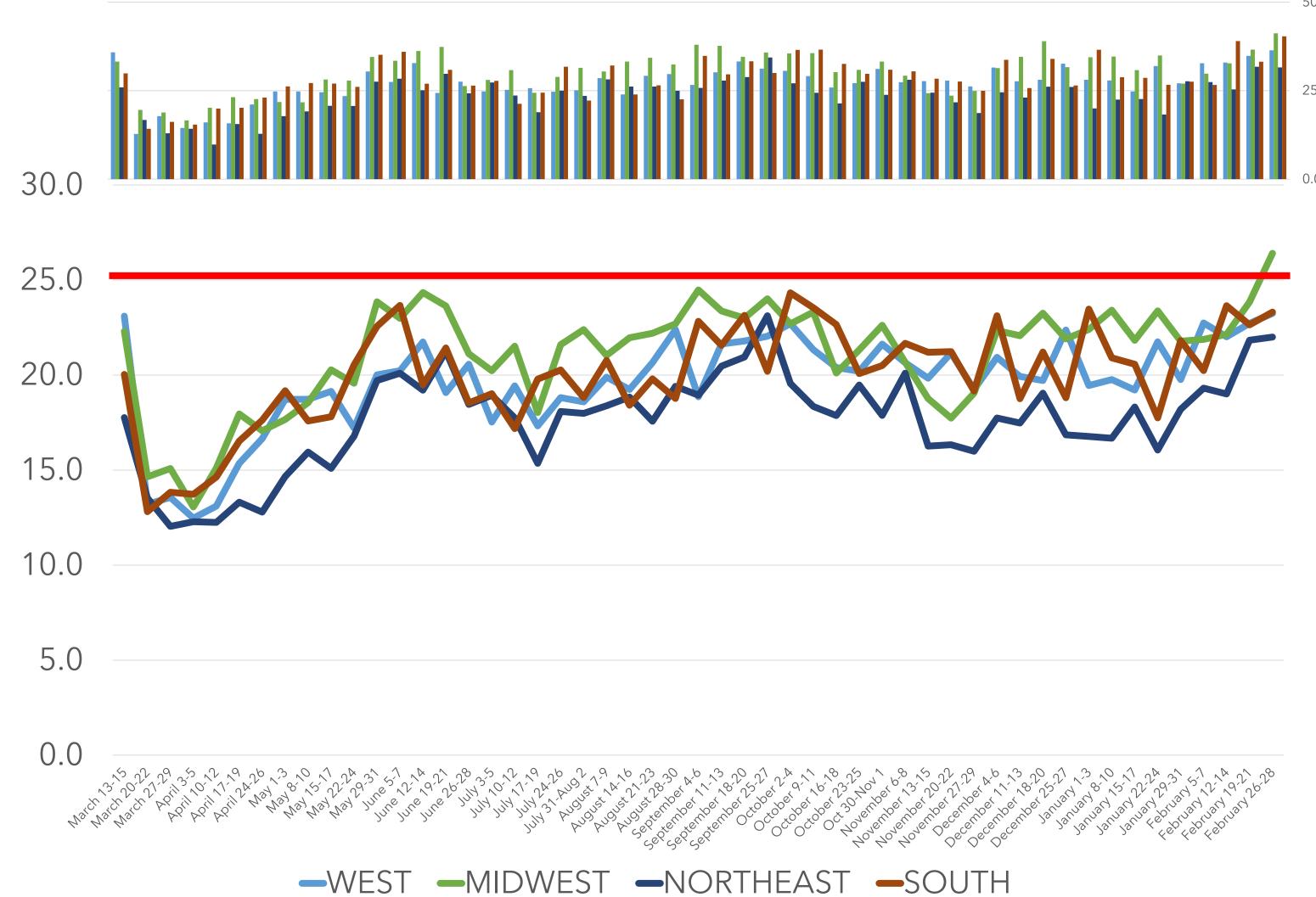


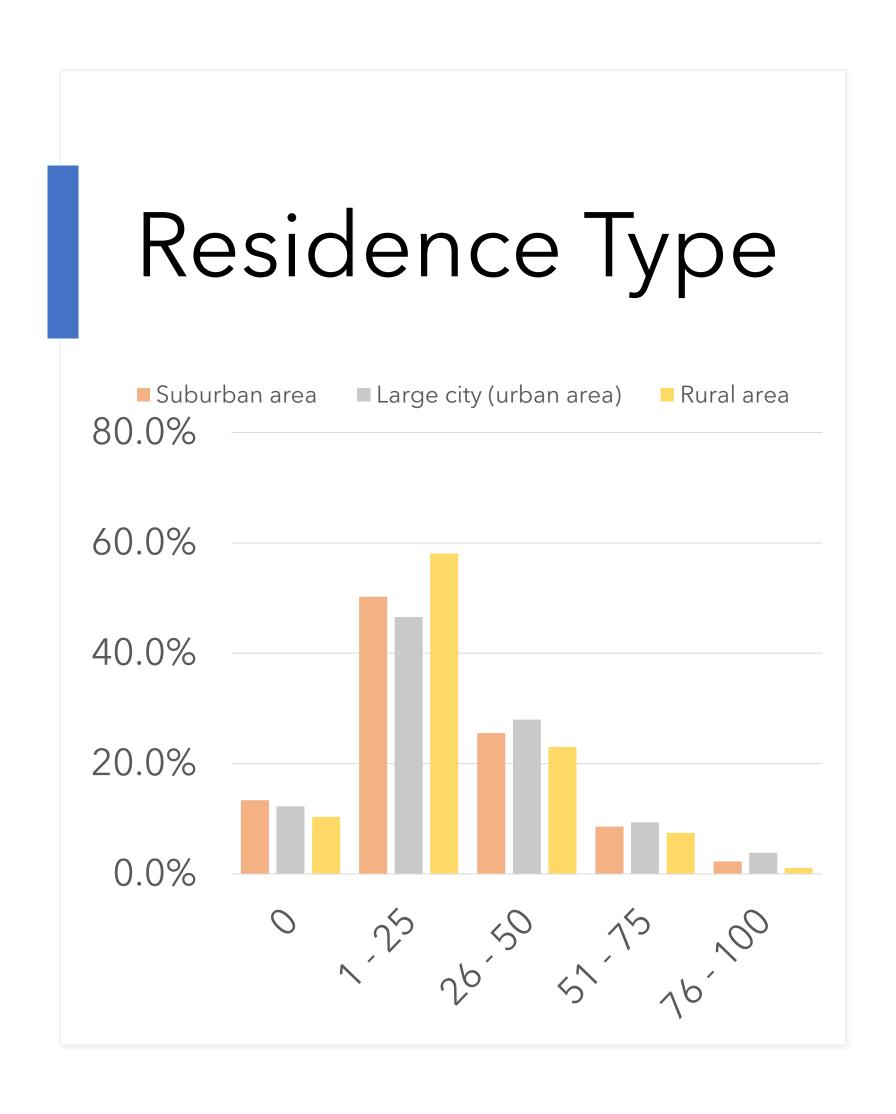


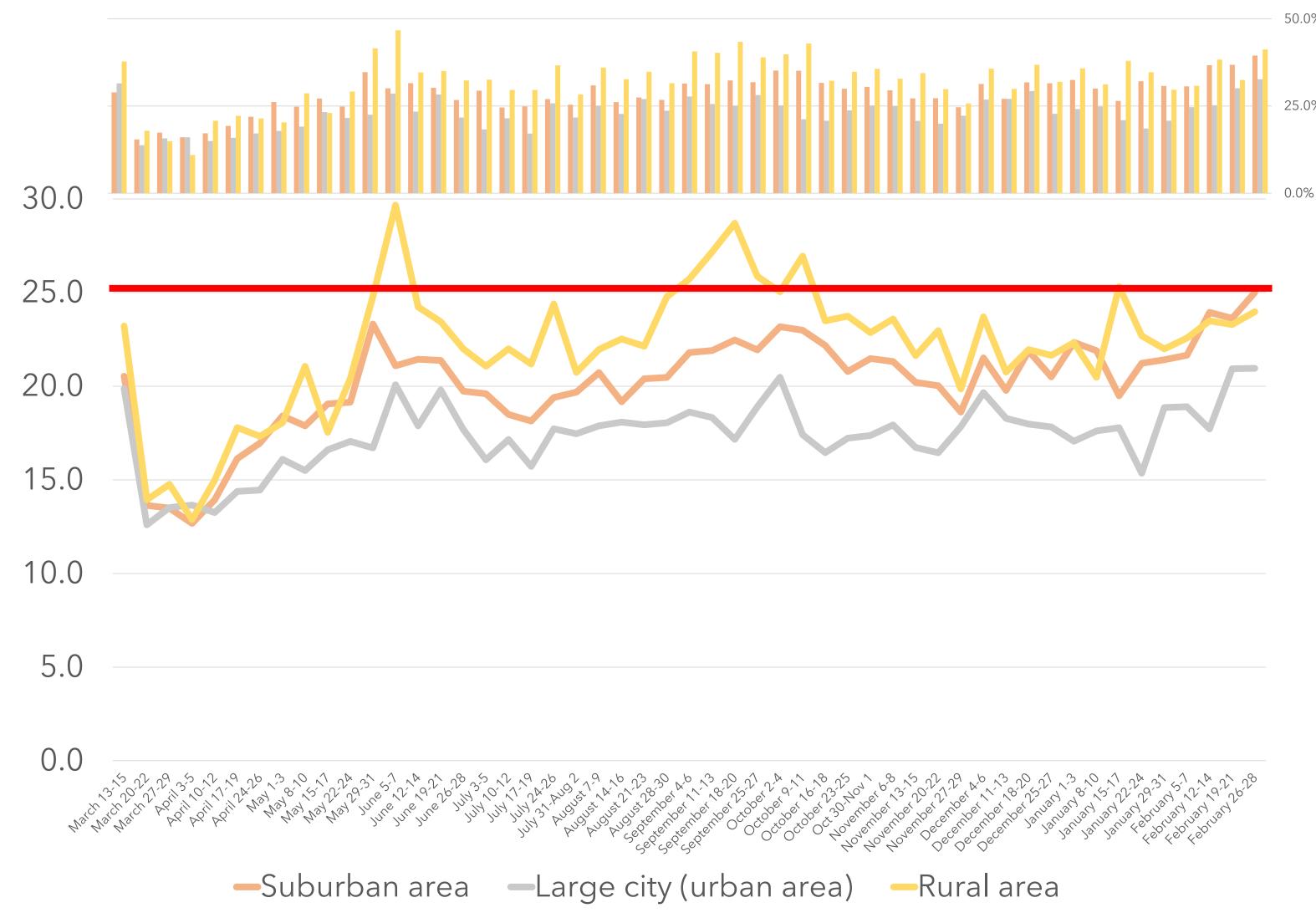


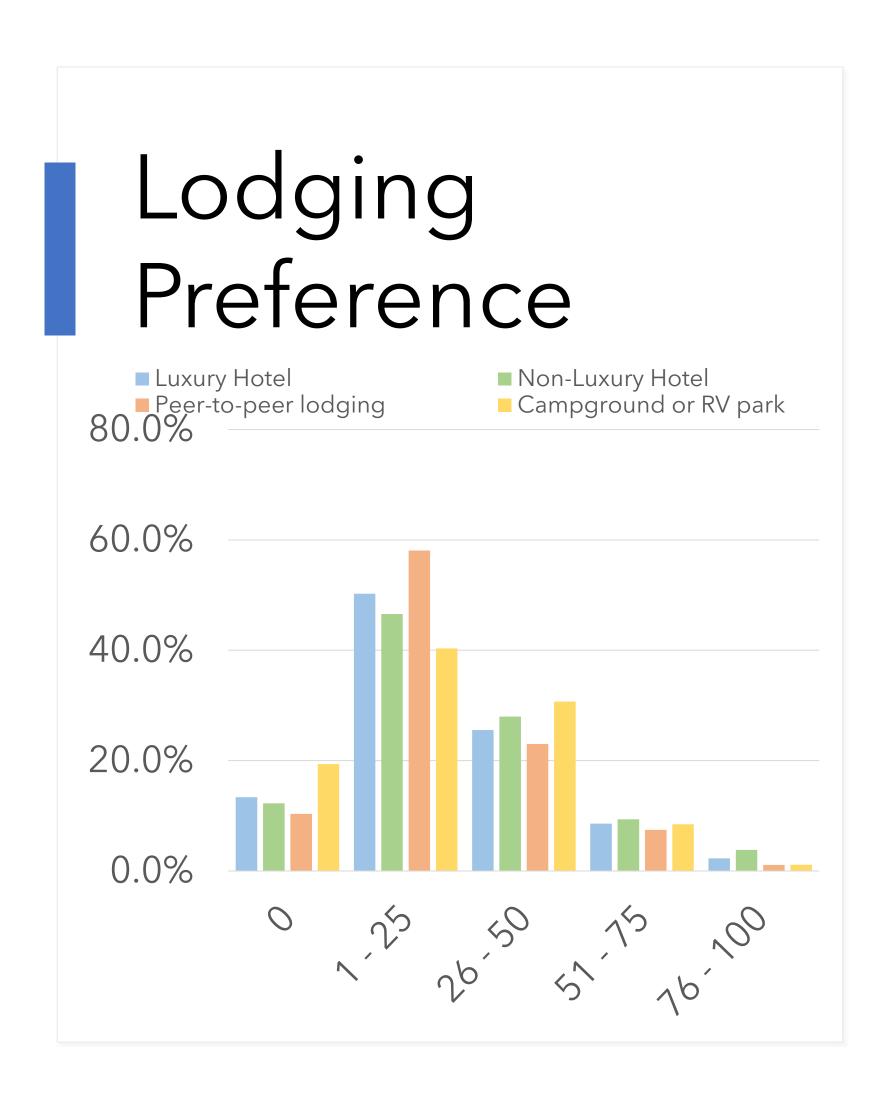


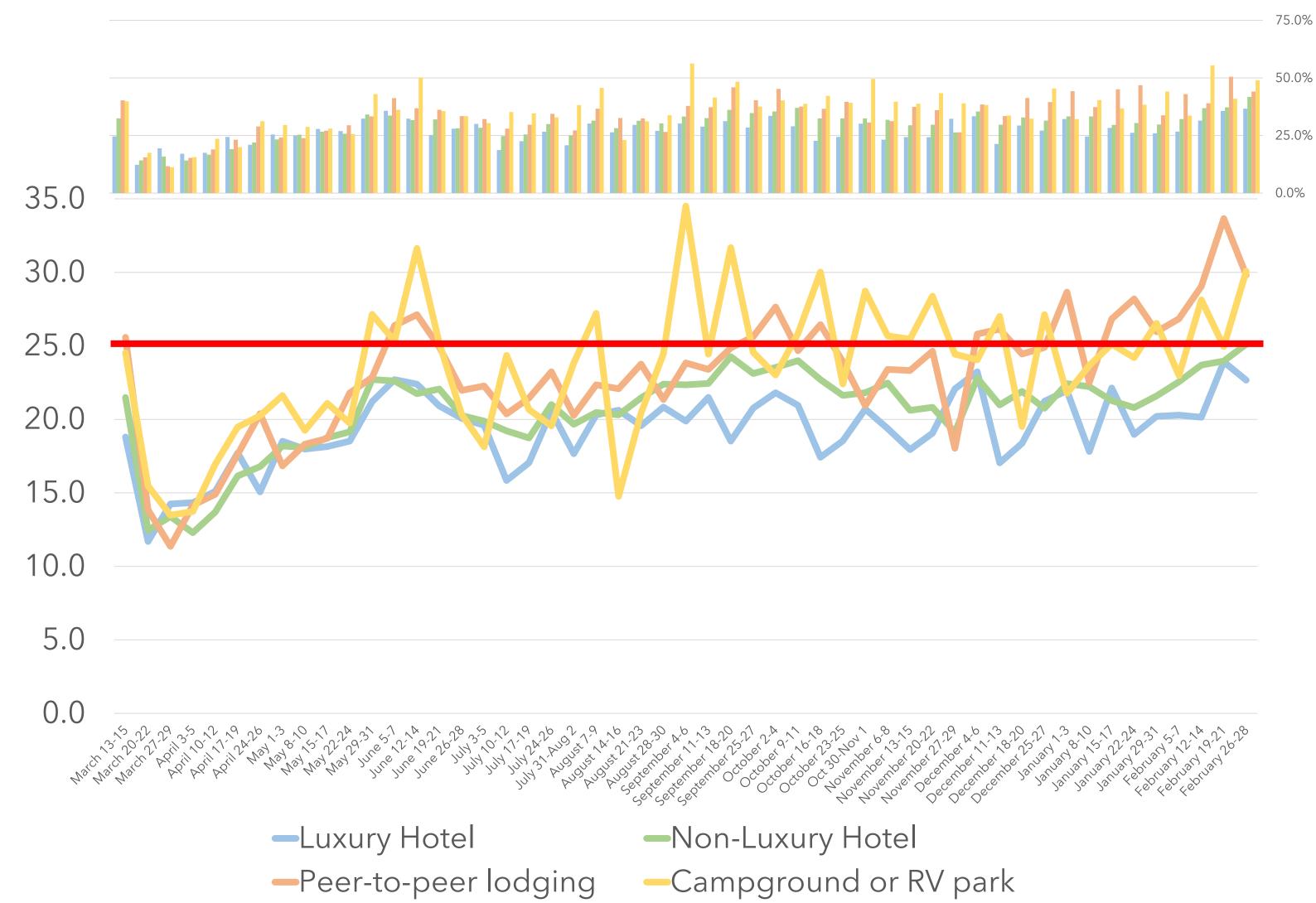














Questions? Need More Information? • We're here for you. Please email us at <a href="mailto:info@destinationanalysts.com">info@destinationanalysts.com</a>.

 Our full hub of insights is available at <a href="https://www.destinationanalysts.com/covid-19-insights/">https://www.destinationanalysts.com/covid-19-insights/</a>





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