DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF March 22nd, 2021

Destination Analysts



About Destination Analysts

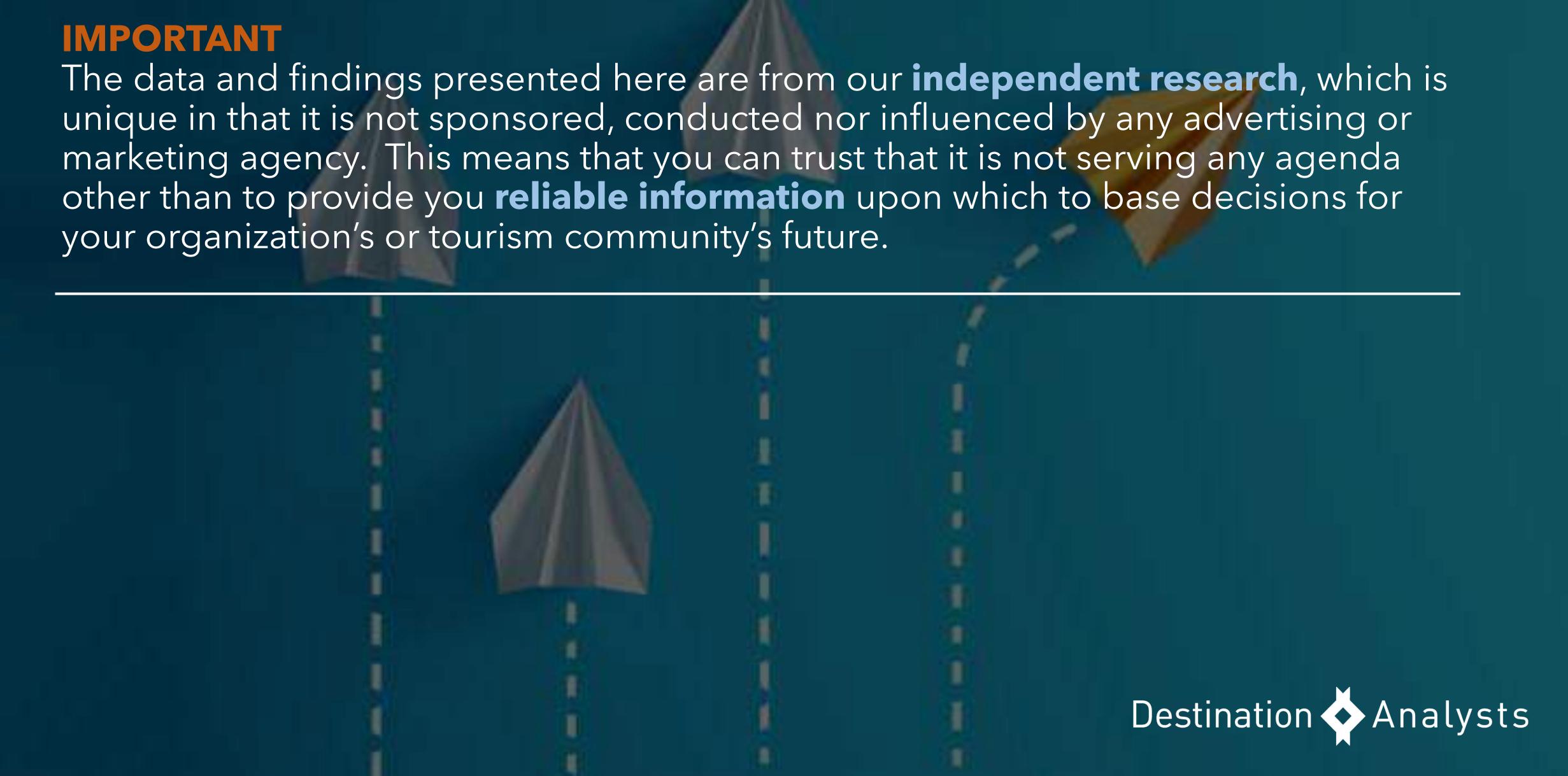
Destination Analysts is a market research company that offers businesses a breadth of insights, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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.







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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 an important conversation with a panel of Asian-American & Pacific Islander travelers. Don't miss the opportunity to hear directly from these travelers about their unique travel considerations and what they want to hear from travel brands.

Sign up to attend the webinar on Tuesday, March 23rd at 11:00am ET <u>here</u>.





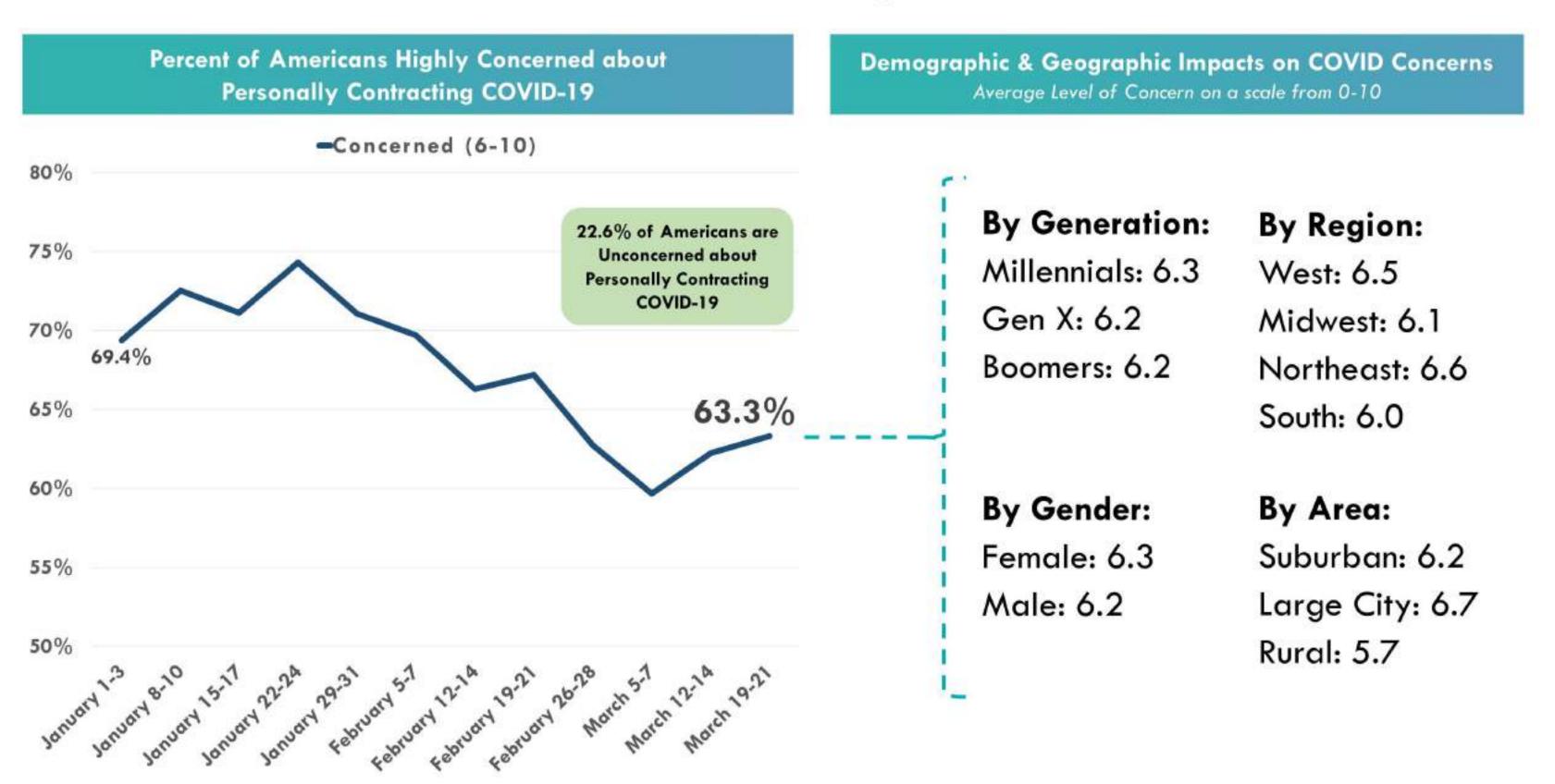
Key Findings for the Week of March 22nd Please cite Destination Analysts when using or distributing this data





Current Concerns About Contracting COVID-19 Among American Travelers

New COVID variants, uncertainty on the current **COVID** vaccines' effectiveness with such variants, a European third wave, and <u>Spring</u> **Break** rowdiness made headlines this week, likely contributing to a small but notable rise in pandemic-related anxiety among American travelers. The proportion of American travelers that feel the pandemic situation will get worse in the U.S. in the next month rose over 7% to 18.5%, after hitting a low of 11.1% last week. Similarly, those highly concerned about their friends and family contracting the virus rose to 71.0% after being at a low of 65.4% two weeks ago. This week, 63.3% of American travelers are highly concerned about personally contracting COVID-**19.** Such concern is higher among women, Millennials, urban dwellers, and those residing in the West and Northeast regions of the U.S.



(Please answer using the scale below)

(Base: Wave 54 data. All respondents, 1,208 completed surveys. Data collected March 19-21, 2021)



CURRENT CONCERNS ABOUT CONTRACTING **COVID-19 AMONG AMERICAN TRAVELERS**

JANUARY 1-MARCH 21, 2021

Question: Thinking about the current coronavirus situation, in general, how concerned are you personally about contracting the virus?





Americans highly concerned about the pandemic's impact on our national economy also grew, reaching 79.6% this week.

This may play a role in their feelings towards tourism in their own communities. Among the 46.1% of American travelers who report they would be happy to see an ad promoting tourism to their town of residence, by far the most common reason for this is that it would help local businesses (64.8%).



Question: Why would you be "Happy" seeing an advertisement now promoting your community as a place for tourists to come visit when it is safe? (Select all that apply)



WHY AMERICANS WOULD BE HAPPY TO SEE TOURISM ADS FOR THEIR OWN COMMUNITY AS OF MARCH 21, 2021

of American Travelers would happy right now to see 46.1% an ad promoting tourism to their own community 64.8% It would help local businesses

04.0 /0
38.4%
29.8%
26.0%
14.6%
12.8%

(Base: Wave 54 data. All respondents, 1,208 completed surveys. Data collected March 19-21, 2021)

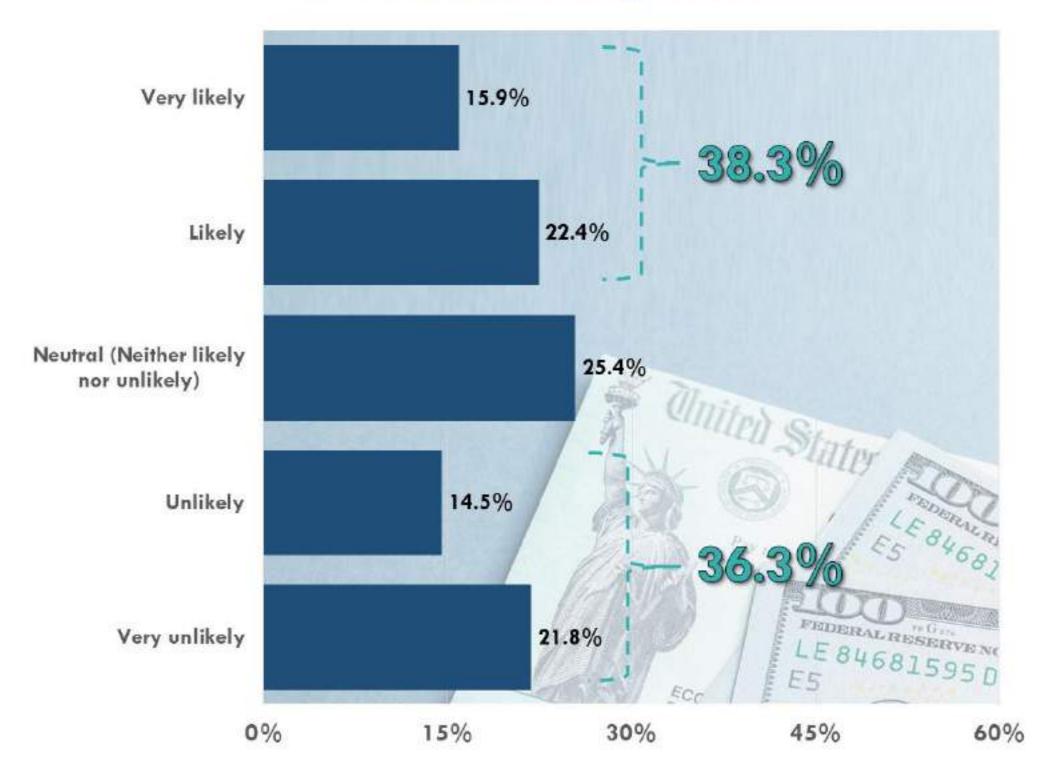


Also happening in the last week: Americans began receiving stimulus checks due to the recently passed American Rescue Plan Act.

Over half of American travelers surveyed believed they would receive some payment from this legislation. Travel looks to certainly benefit from this injection of money into citizen's hands, as 38.3% of those who have or are expecting a stimulus check say they are likely to spend some portion of it on leisure travel. This is even more prevalent among Millennial age travelers, who are, in fact, twice as likely as Boomer age travelers to spend their stimulus money on travel (48.4% vs 24.9%).



LIKELIHOOD TO SPEND **COVID STIMULUS ON LEISURE TRAVEL** AS OF MARCH 21, 2021



Question: How likely is it that you will spend at least some portion of this payment on leisure travel? (Select one)

(Base: Wave 54 data. All respondents expecting to receive COVID relief checks, 671 completed surveys. Data collected March 19-21, 2021)





American Travel Dreaming & Planning in 2021

With nearly two-thirds both in a ready-to-travel mindset and highly open to travel inspiration, Americans are dreaming, planning and booking travel at increasingly higher rates.

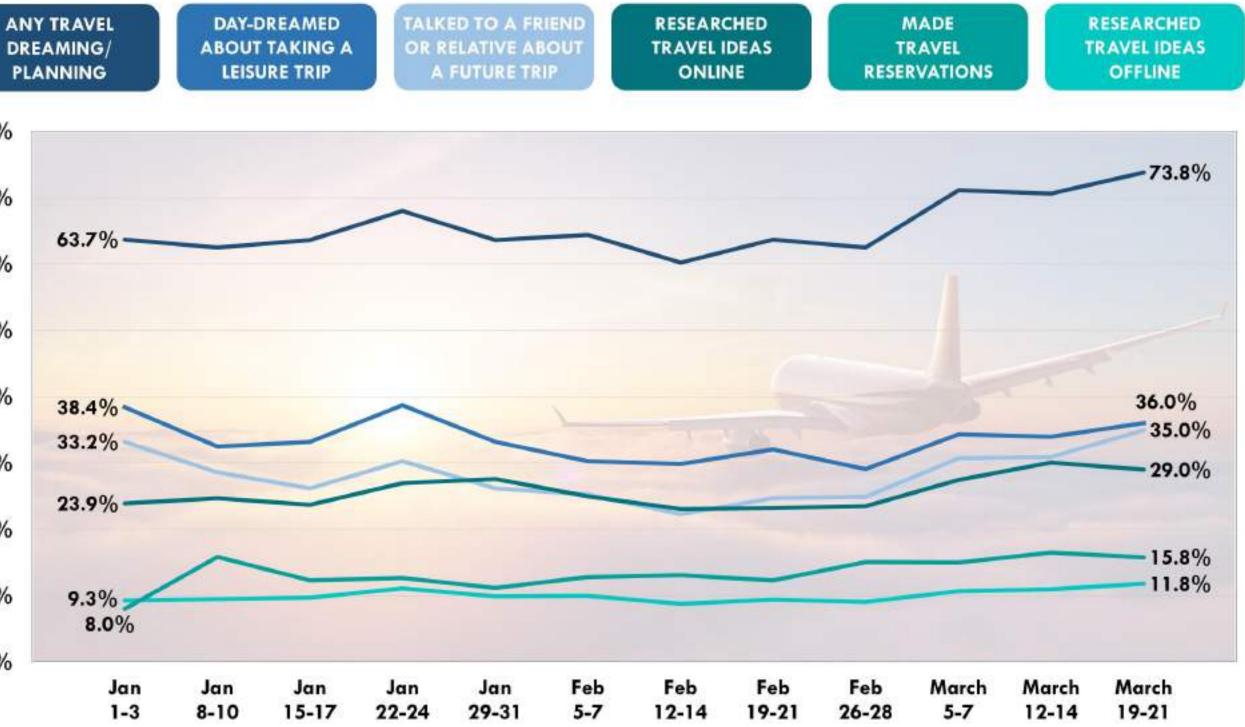
70% A 2021 record-high 73.8% of American travelers did 63.7% some travel planning and dreaming in the last week 60% alone. Day-dreaming about vacationing and talking to 50% people about their future trips were each reported by 40% 38.4% 33.2% over one-third of American travelers. Nearly 30% 30% 23.9% researched travel ideas online. Meanwhile, 15.8% said 20% they made a travel reservation in the last week; of this 10% 9.3% 8.0% group, 57.0% booked a hotel room while 42.1% bought 0% Feb Feb Feb March Jan Feb Jan Jan Jan airline tickets. In each of the months from May through Jan 1-3 19-21 26-28 8-10 29-31 5-7 15-17 22-24 12-14 5-7 October, over 20% of American travelers report having Question: In the past week, which of the following have you done? (Select all that complete the sentence) at least tentative trip plans.

80%



(Base: Waves 43-54 data. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204 and 1,208 completed surveys.)

AMERICAN TRAVEL DREAMING & PLANNING IN 2021 JANUARY 1—MARCH 21, 2021



In the past week I have _____



As Americans are feeling far safer with travel than they were just a few months ago, unlike earlier in the pandemic, they are including air travel in their plans.

Right now, 43.9% of air travelers deem flying on a commercial airline safe. Over 45% of air travelers say their very next trip by commercial airline will be by the end of Summer. For this next air trip, 42.0% report that they will be flying to a destination over 1,000 miles away for nearly a week on average.

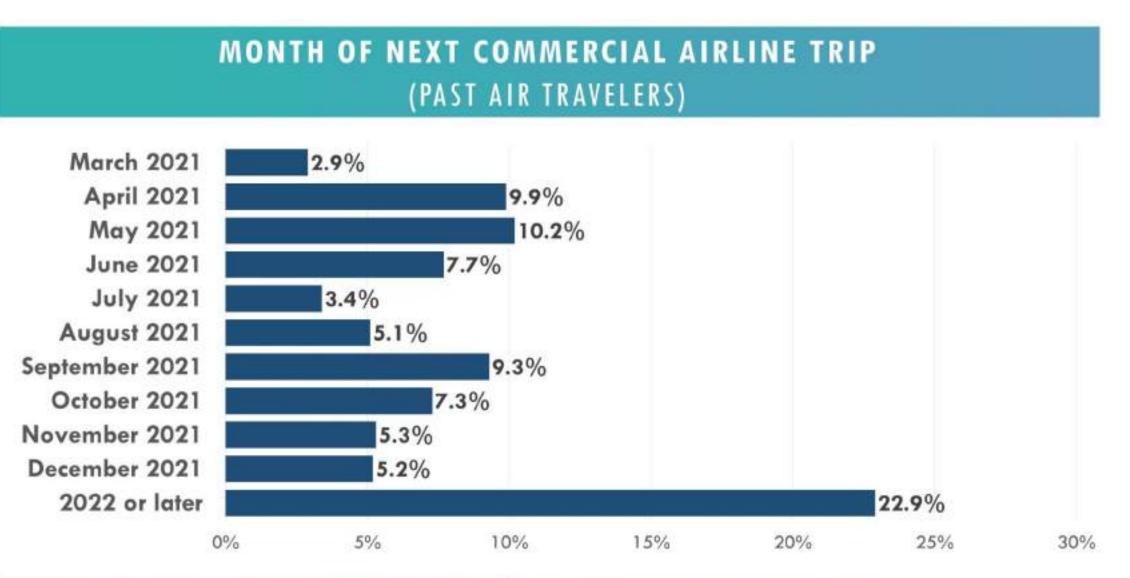
(Base: Wave 54 data. All respondents, 1,208 completed surveys. Data collected March 19-21, 2021)



AMERICANS & AIR TRAVEL

AS OF MARCH 21, 2021

of past air travelers think flying on a commercial airline is safe right now 43.9%



DISTANCE OF NEXT AIR TRIP



6.3 Days Average Length of Next Air Trip







Tracking the Long-Term Impacts of the Pandemic on Travel

Despite feeling safer and increasingly more positive, many Americans do expect a longer term impact from the pandemic on their travel.

Nearly 60% agree that the pandemic has changed their outlook on life overall, with over 20% saying significantly. As a result, 46.9% agree they will put more effort into visiting places on their travel bucket list in the next few years. Many in the travel industry have pondered a more permanent tie to public health-they may be on to something as nearly three-quarters of American travelers agree they will be more safety-conscious while traveling going forward. When asked if the pandemic had changed their opinions about the types of destinations they want to visit for leisure in the future, 41.8% of American travelers said yes, to at least some degree. For beach, National Park and other outdoor destinations, this is welcome news as 52.2% of Americans agree they will be visiting these types of destinations more as a result of the pandemic. Urban, entertainment and theme park-focused destinations will face greater challenges in the recovery, as 44.6% of American travelers report they are less likely to visit these places in the next few years because of the pandemic. In addition, about four-in-ten American travelers expect they will be sticking closer to home and spending less on their leisure travel in the coming years.



TRACKING THE LONG-TERM IMPACTS OF THE PANDEMIC ON TRAVEL AS OF MARCH 21, 2021

58.1%

Say the pandemic has changed their outlook on life



41.8%

Say the pandemic has changed their opinions about the types of leisure destinations they want to visit in the future



72.7%

Agree they will be more safety-conscious while traveling over the next few years



OVER THE NEXT FEW YEARS, AS A DIRECT RESULT OF THE COVID-19 PANDEMIC:

46.9%

Agree that they will probably put more effort into visiting places on their travel bucket list







44.6%

Agree they will be less likely to visit popular, entertainment-oriented destinations

(Base: Wave 54 data. All respondents, 1,208 completed surveys. Data collected March 19-21, 2021)













POULO 0000110101010 1001101010001101 0100001 1001101010000 п. 11001101 **Coronavirus Travel Sentiment Index** Measuring the Potential Influence of Travel Marketing Highlights from the Week of March 22nd 0 1 **1 0 1 1 1 1 0 0 1 1 0 1 0 1 0 0 0 1 1 0** 0101100010011010001100 LNP 011011-1100110101001/ 10110001001101000110/



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 datadriven predictions.

The goals are to identify:

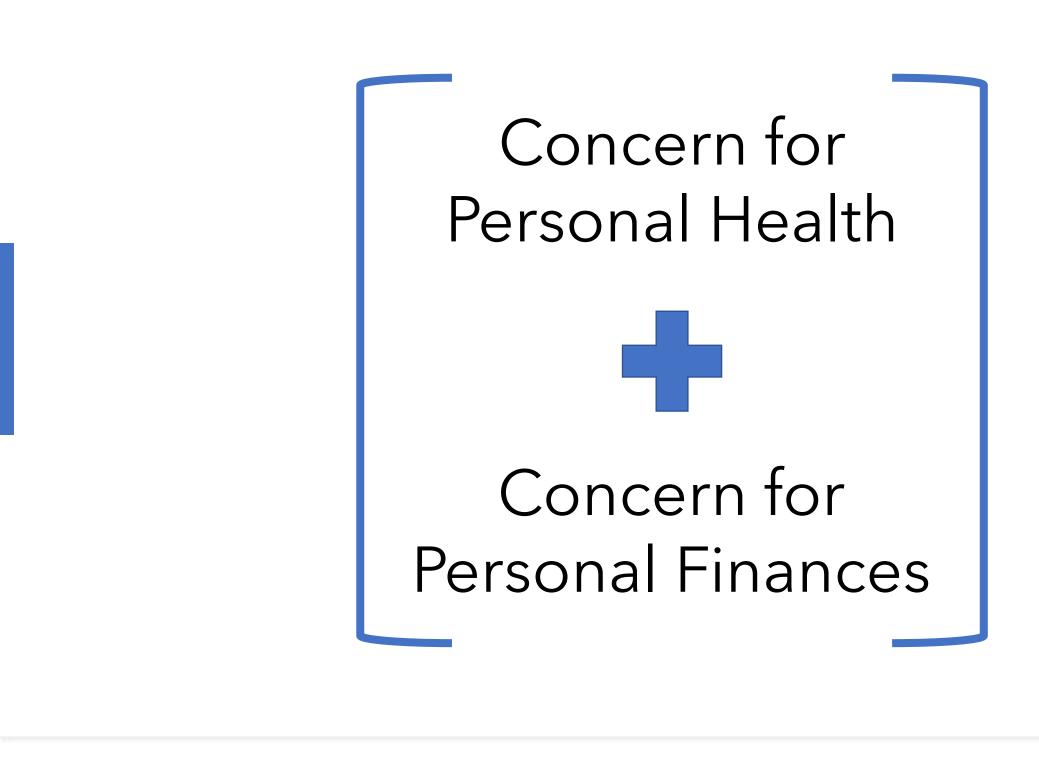
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel





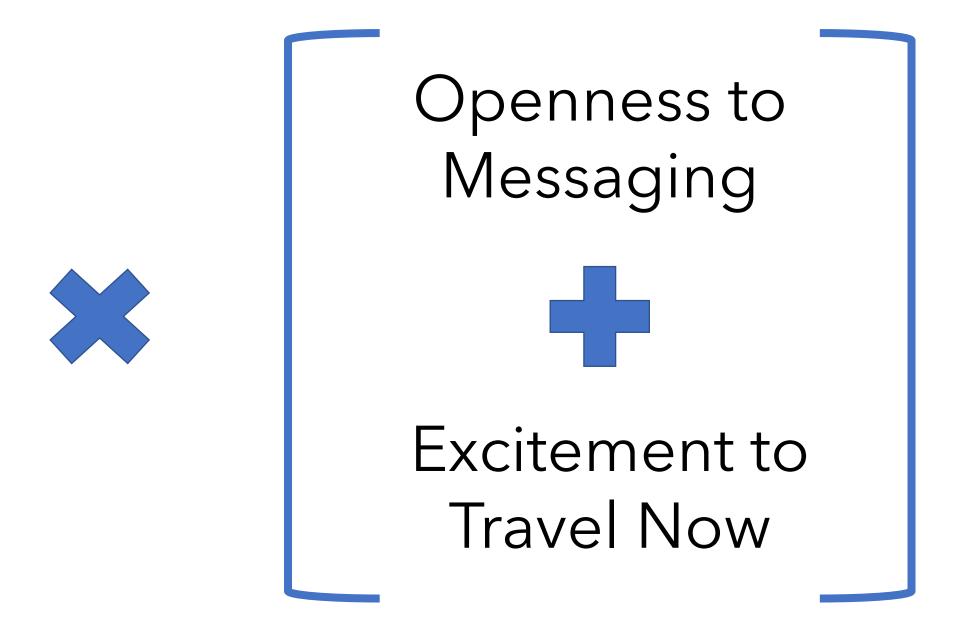


Predictive Index Formula



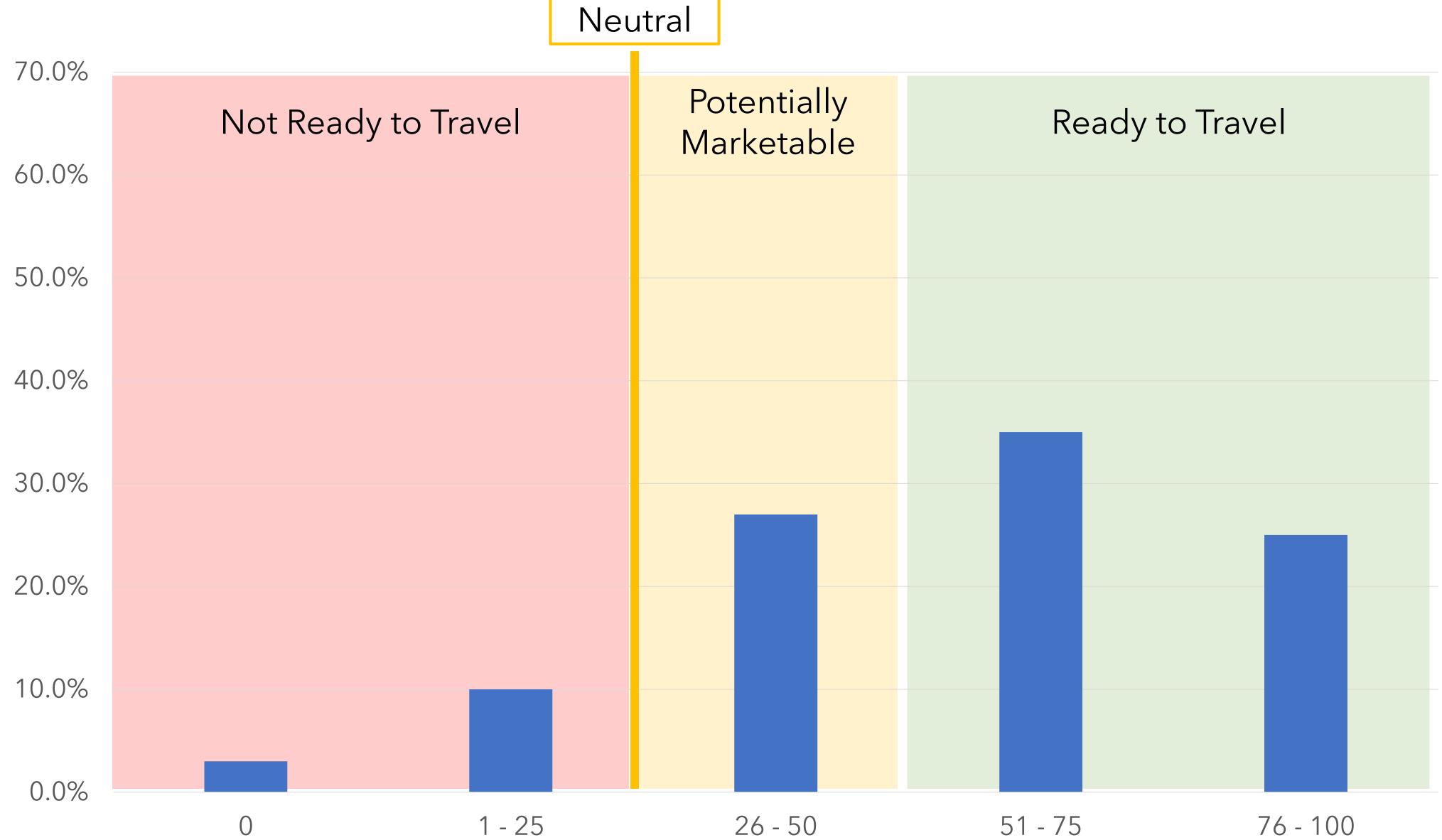
*Normalized to a 100pt scale







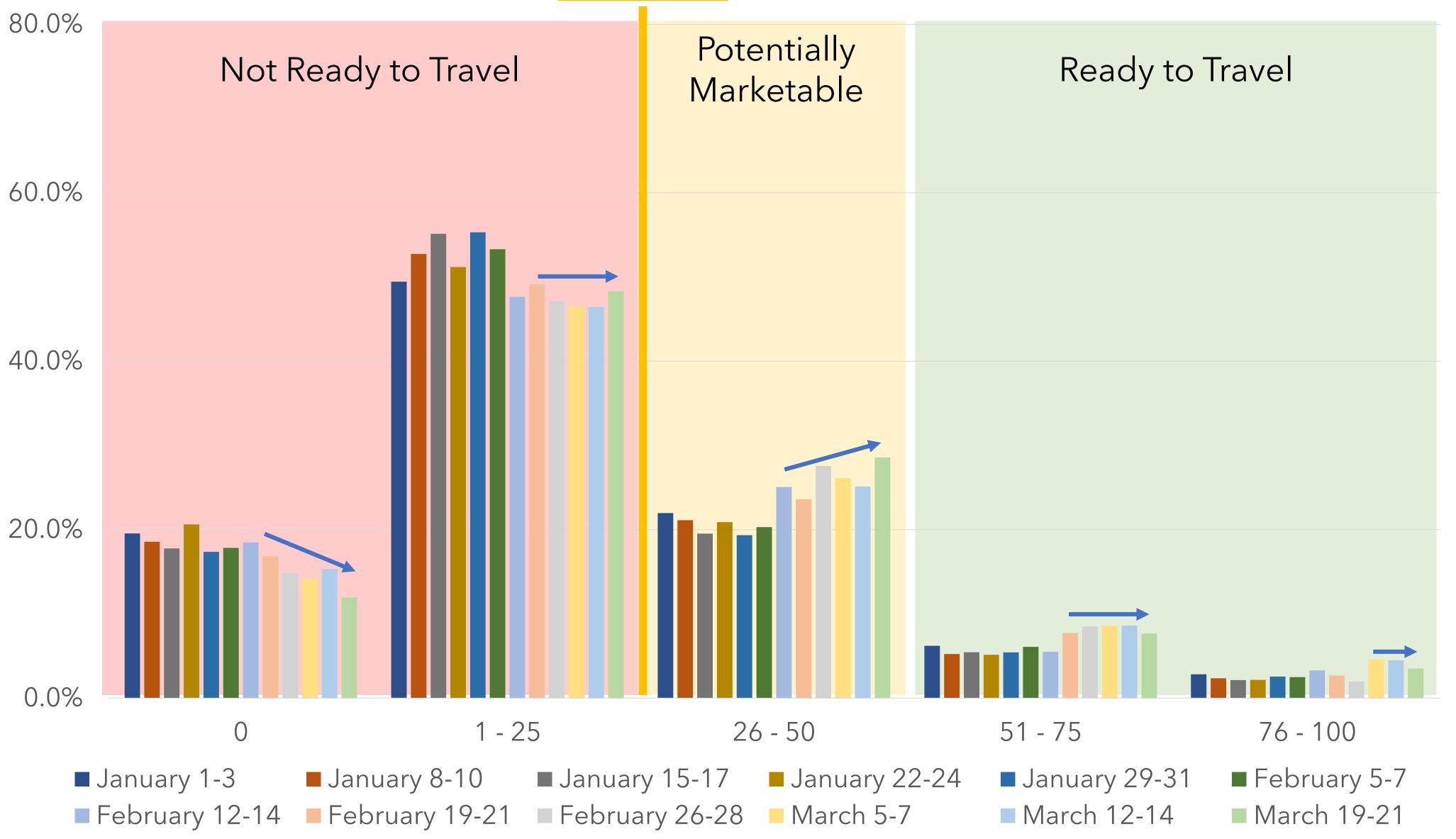
Healthy Travel Outlook



High Travel



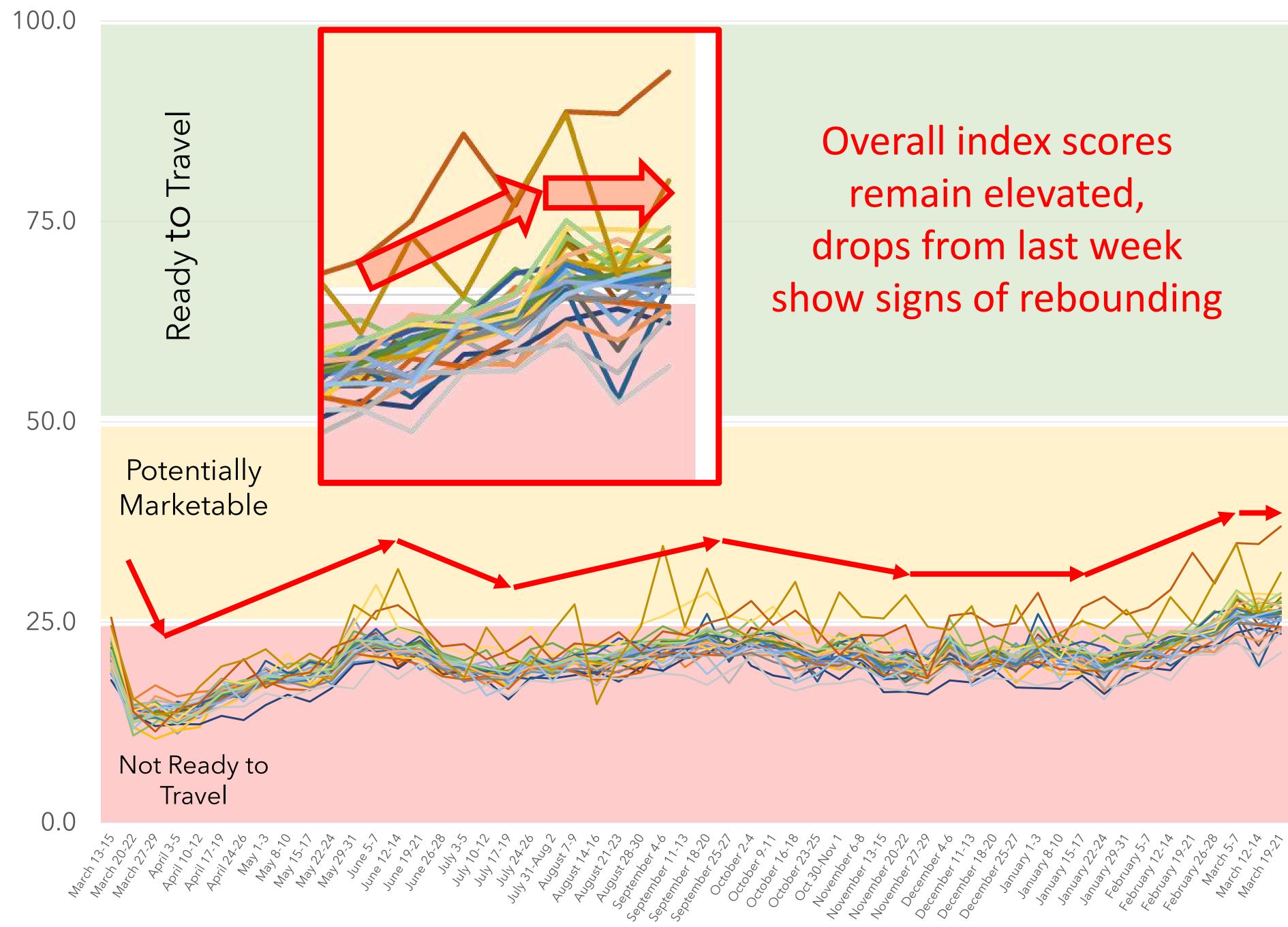
Neutral







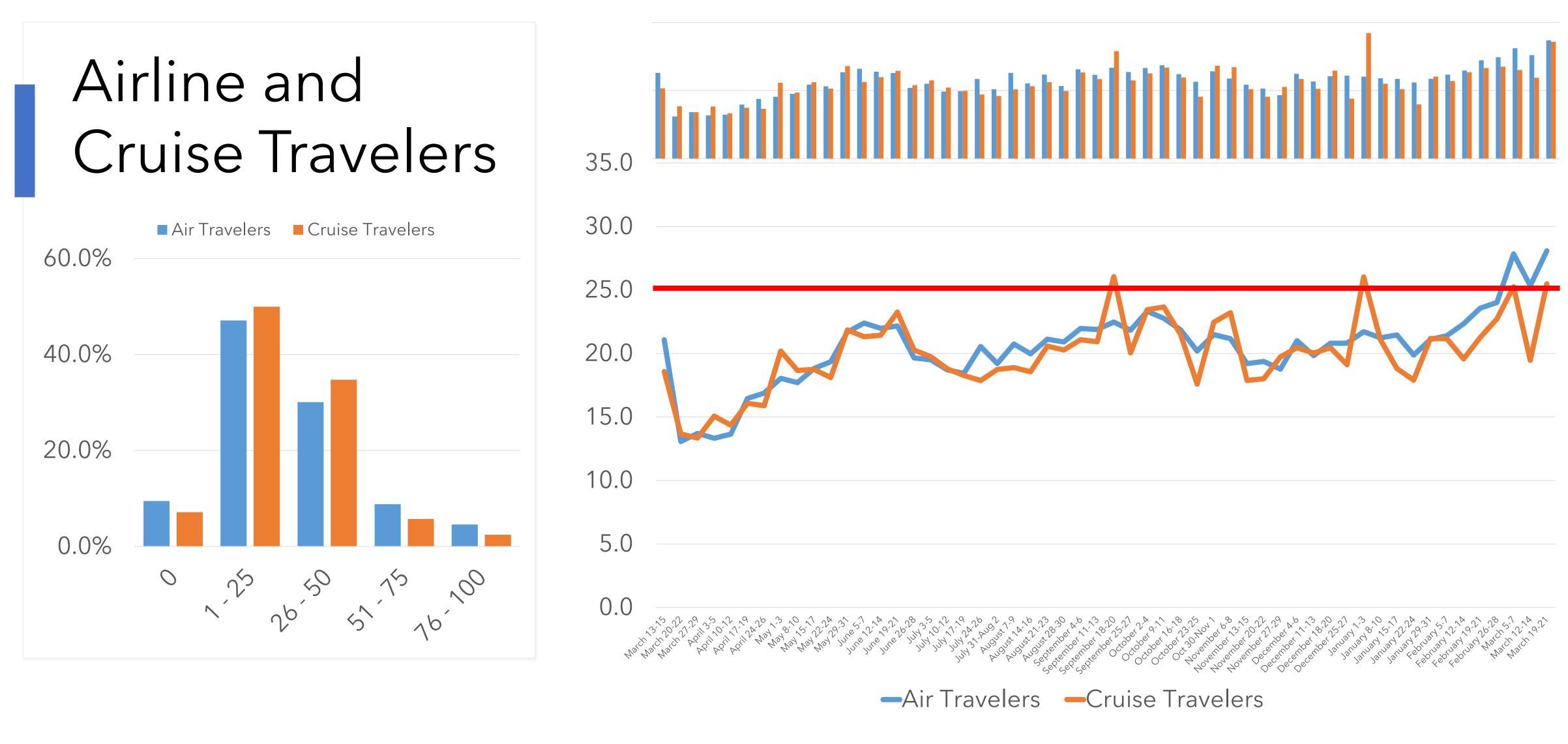




—Total

- -Millennials or younger
- —Gen X
- -Boomer or older
- -WEST
- -MIDWEST
- -NORTHEAST
- -SOUTH
- —International Travelers
- —Air Travelers
- -Cruise Travelers
- —Leisure Travelers
- -VFR Travelers
- -Business Travelers
- —Female
- -Male
- —Affluent Over \$125K
- **—**\$80K \$125K
- —Under \$80K
- -City Travelers
- -Beach Travelers
- -Mountain Travelers
- Desert Travelers
- -Suburban area
- —Large city (urban area)
- -Rural area
- —Luxury Hotel
- -Non-Luxury Hotel
- -Peer-to-peer lodging
- -Campground or RV park











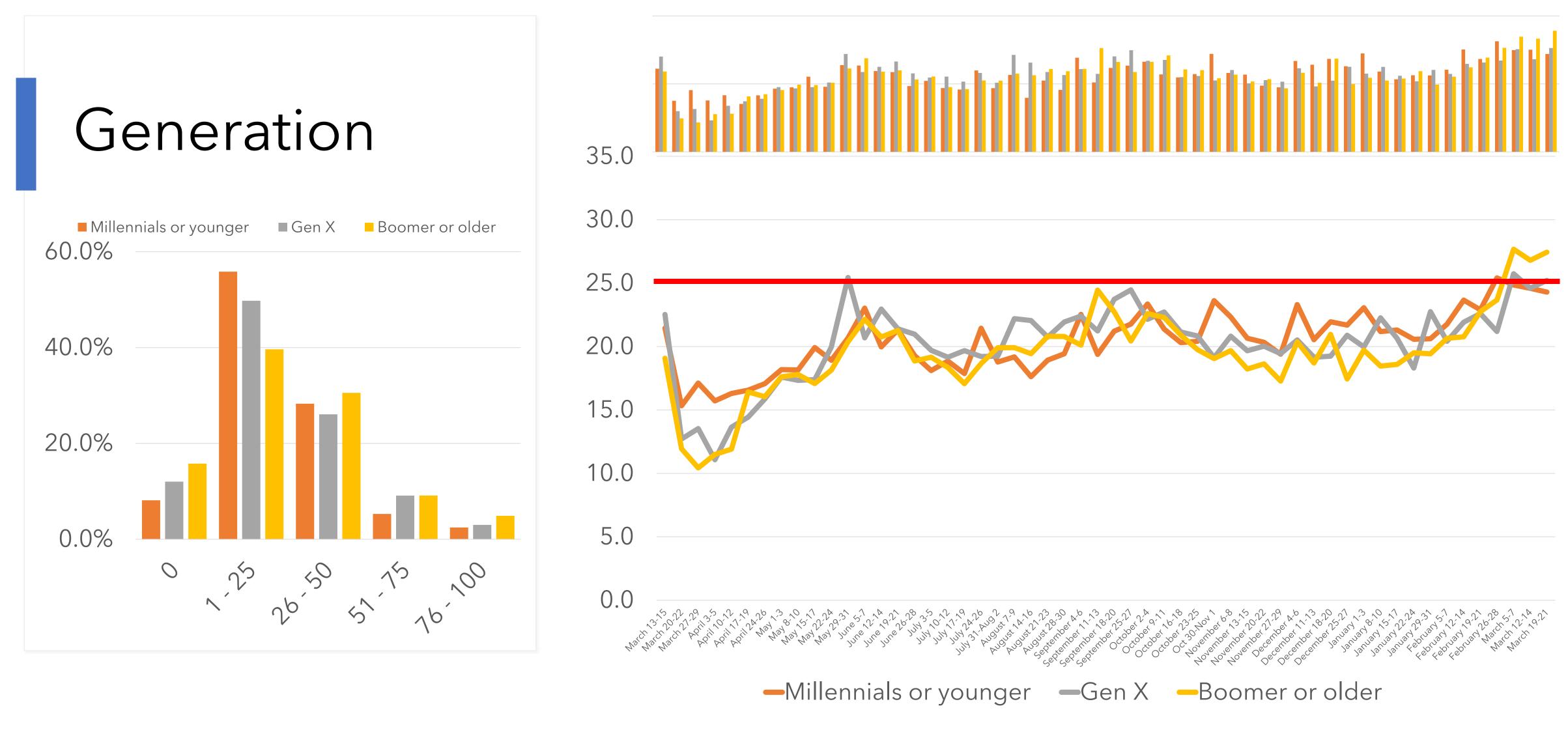












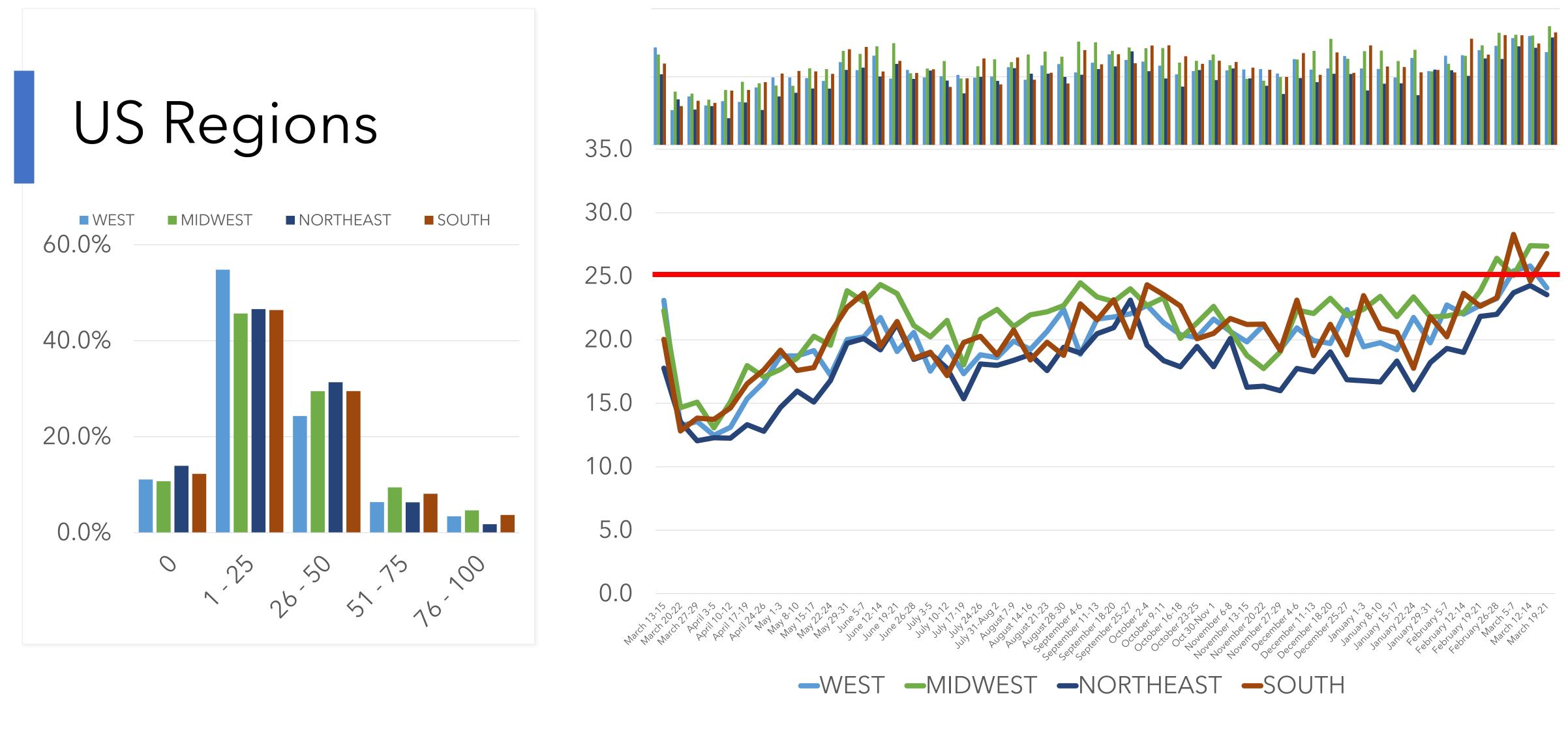












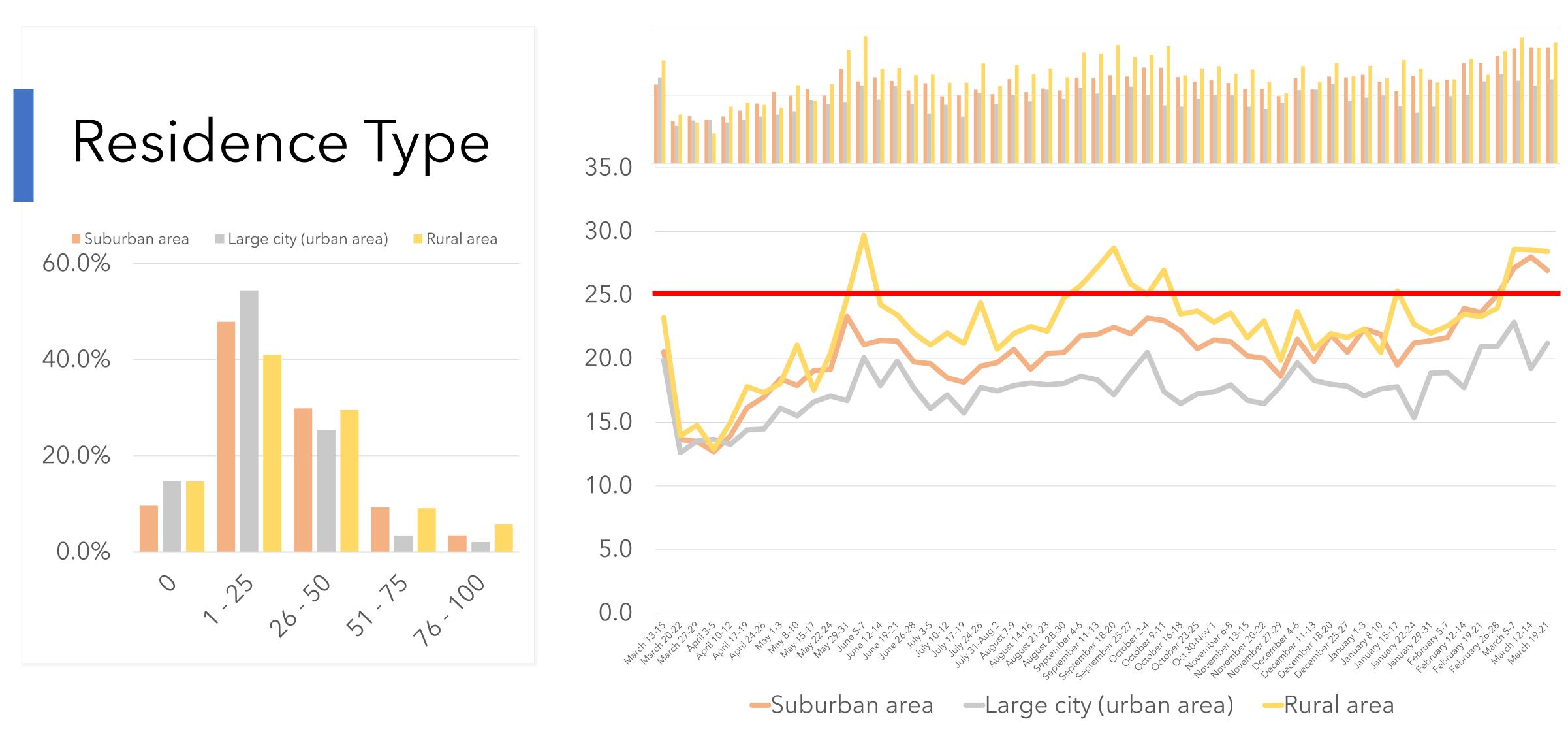




































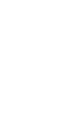
Questions? Need More Information?

• 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/











15-minute presentations torvour board af

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MARCH 30, 2021

THE LATEST ON AMERICAN TRAVEL TRENDS & TRAVEL INDUSTRY UNPOPULAR OPINIONS

APRIL 6, 2021

APRIL 13, 2021

THE LATEST ON AMERICAN TRAVEL TRENDS & CONVERSATION WITH BLACK TRAVELERS

THE LATEST ON AMERICAN TRAVEL TRENDS & DISCUSSION WITH NATIONAL CONCESSIONAIRES





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