

DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

KEY FINDINGS—WEEK OF March 8th, 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.

This marks the 52nd week that Destination Analysts has produced the *Coronavirus Travel Sentiment Index*. While it's not a milestone we set out to achieve, we nevertheless celebrate the community it has fostered. Thank you for being along with us on this journey—we are grateful for all your kind words, your questions, your topic suggestions and your sharing of these findings with others that can benefit. We are especially indebted to those of you who have subscribed and donated to keep this study going for far longer than we anticipated.

Erin Francis-Cummings, Destination Analysts' President & CEO, shares her personal reflection on the anniversary of the *Coronavirus Travel Sentiment Index* and this last year of crisis [here](#).





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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 milestone update of travel insights will be followed by a discussion with meeting and event planner professionals. Tune in to learn about their upcoming programs, their take on current destination ads and the specific elements that make ads relevant and impactful right now.

Sign up to attend the webinar on Tuesday, March 9th at 11:00am ET [here](#).



Key Findings for the Week of March 8th

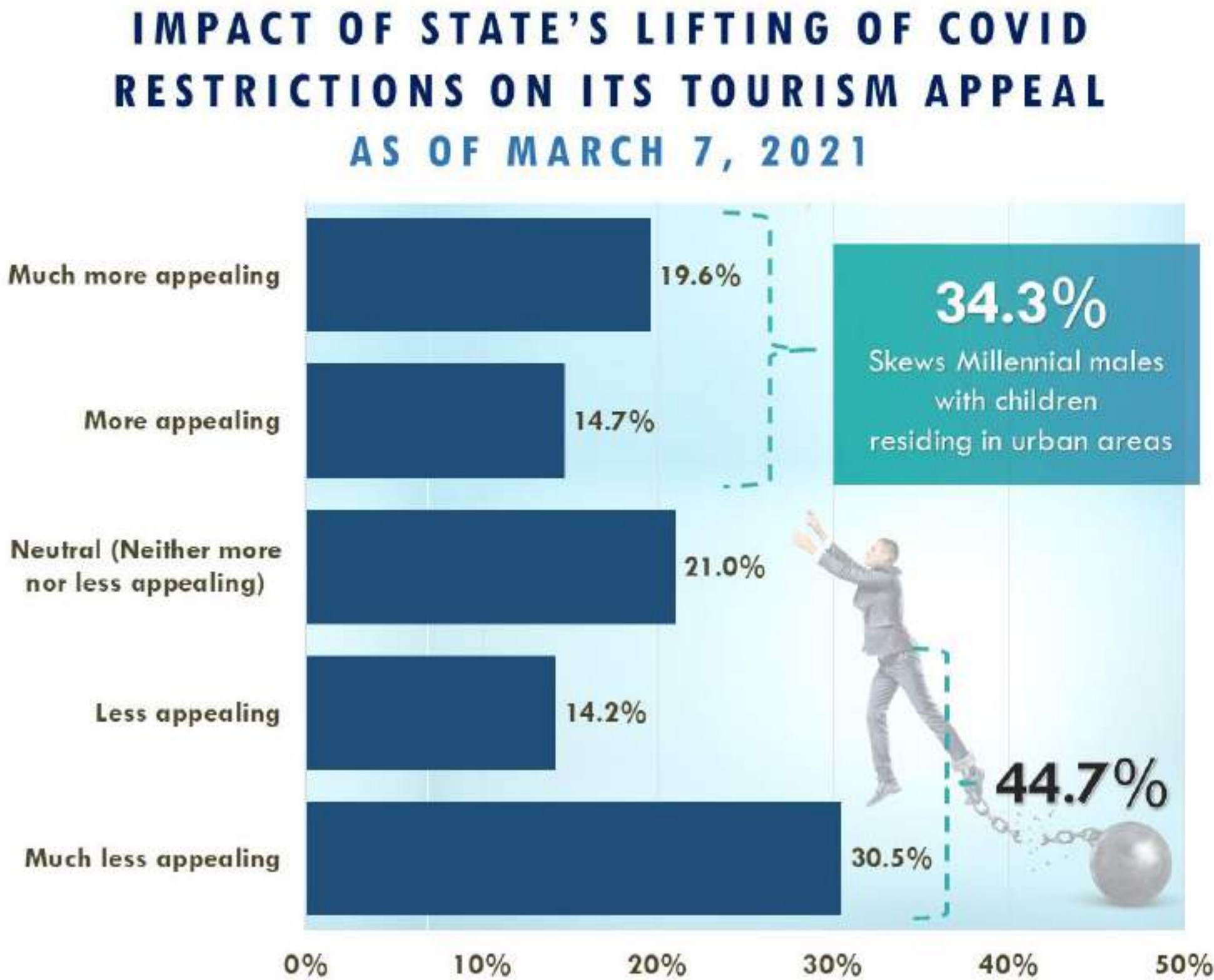
Please cite Destination Analysts when using or distributing this data

Impact of State's Lifting of COVID Restrictions on its Tourism Appeal

With Texas and Mississippi announcing the lifting of COVID restrictions in their states this past week, interestingly there was a very small bump in the percent of Americans who feel the pandemic will get worse in the U.S., inching up to 16.3% from 13.7%. Nevertheless, half of Americans remain optimistic about the coming month. They also continue to feel safer—the average rating of the more than two dozen travel and leisure activities we track as “unsafe” has fallen another 3% this week to 40.0%. This a remarkable decline from a record-high 69.4% recorded the week of April 13th, 2020 and 57.8% at the start of 2021. Firm travel confidence is at a pandemic record 37.0%.

However, we see Americans’ competing and complicated emotions around safety and travel in their response to the question “All else equal, if a state fully lifted its coronavirus restrictions now, would this make that state a more or less appealing destination to visit?”

About 45% of Americans say this would makes the state a LESS appealing destination. Yet over one-third say this would make the state MORE appealing; these travelers skewing Millennial males with children who reside in urban areas. For those responsible for tourism in their destinations, it’s important to note that those who find lifted COVID restrictions unappealing from a tourism standpoint skew towards tourism naysayers right now--largely agreeing they currently don’t want visitors in their own communities.



Question: All else equal, if a state fully lifted its coronavirus restrictions now, would this make that state a more or less appealing destination to visit? (Select one to complete the sentence)

Lifting coronavirus restrictions now would make a state a _____ place to visit.

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)

American Travelers’ Feelings about Taking a COVID-19 Vaccine in One Word

The COVID-19 vaccines continue to serve as a travel stimulator, with 37.8% who have begun planning or booking future travel in anticipation of the COVID-19 vaccine being widely available—up nearly 10% since the beginning of the year.

However, there is also declining agreement that they will wait to travel until they get a vaccine. With the clear importance of COVID-19 vaccines to travel recovery—and the announcement out of Europe this week about vaccine “passports”—we aimed to further understand those Americans travelers who said they definitely will not receive a COVID vaccine (24.1%) or remain unsure (19.5%). While those who have received or plan to definitely receive a COVID vaccine express relief and excitement about it, when those who will not or are unsure about inoculation were asked their primary reasons for this, concerns about the vaccines’ side effects and that the vaccines were not adequately tested are most common.

AMERICAN TRAVELERS’ FEELINGS ABOUT TAKING A COVID-19 VACCINE IN ONE WORD AS OF MARCH 7, 2021

AMERICAN TRAVELERS WHO SAY YES – WILL DEFINITELY TAKE/HAVE ALREADY TAKEN A COVID -19 VACCINE



AMERICAN TRAVELERS WHO SAY MAYBE THEY WILL TAKE A COVID-19 VACCINE



AMERICAN TRAVELERS WHO SAY NO - WILL NOT TAKE A COVID-19 VACCINE



Question: What one word best describes how you feel about taking the COVID-19 vaccine?

(Base: Wave 52 data. All respondents who said they will/have already taken the vaccine, will maybe take the vaccine, or will not take the vaccine, 711, 154 and 285 completed surveys. Data collected March 5-7, 2021)

TRAVEL DREAMING & PLANNING

BETWEEN MARCH 1–7, 2021

American travelers are aligned on increased travel interest and activity.

Openness to travel inspiration grew another 5% and reached another pandemic record high—now at 60.6%. In the past week, a pandemic-record 71.1% travelers dreamt and/or planned travel. 15.0% said they actually made a booking, largely hotels and airline tickets. About 84% of American travelers have trips at least tentatively planned, and there is a growing percentage reporting planned trips for May (20.3%).

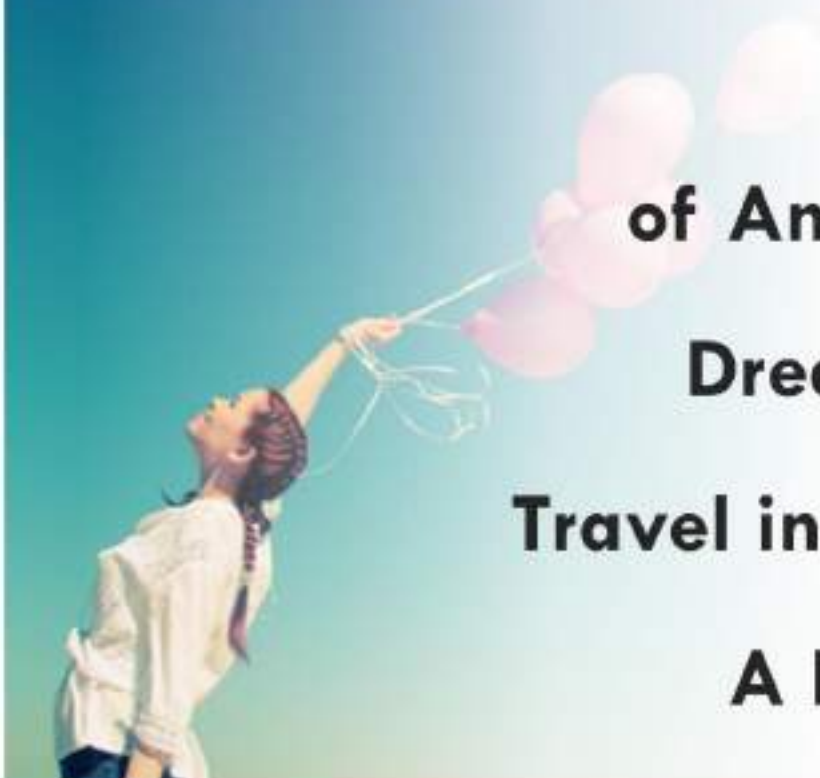
84%

of American Travelers
Have Trips at Least
Tentatively Planned

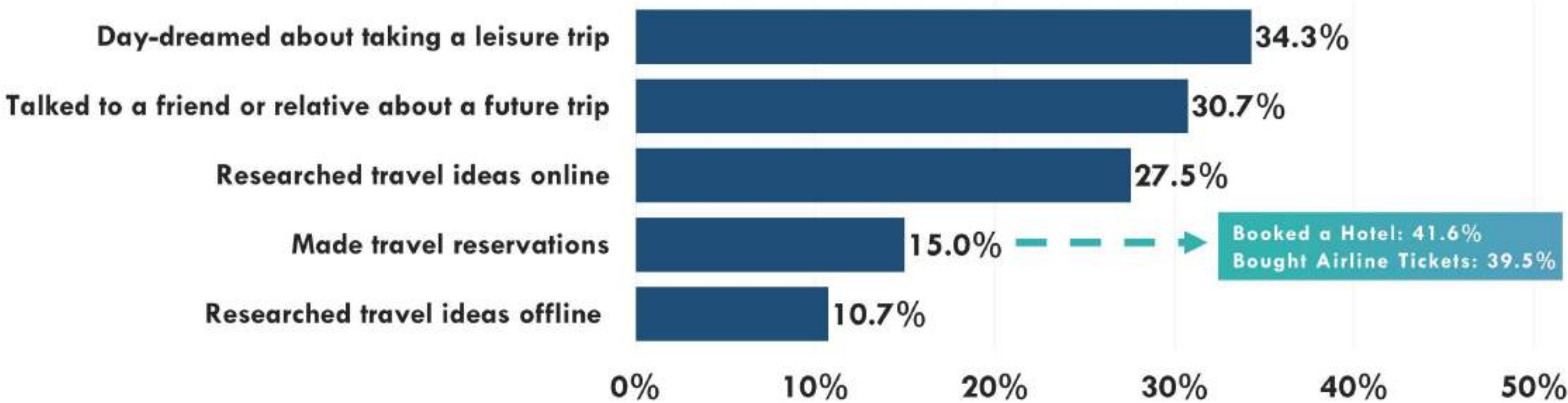


71%

of American Travelers
Dreamt and Planned
Travel in the Last Week—
A Pandemic Record



TRAVEL PLANNING IN THE PAST WEEK



(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)

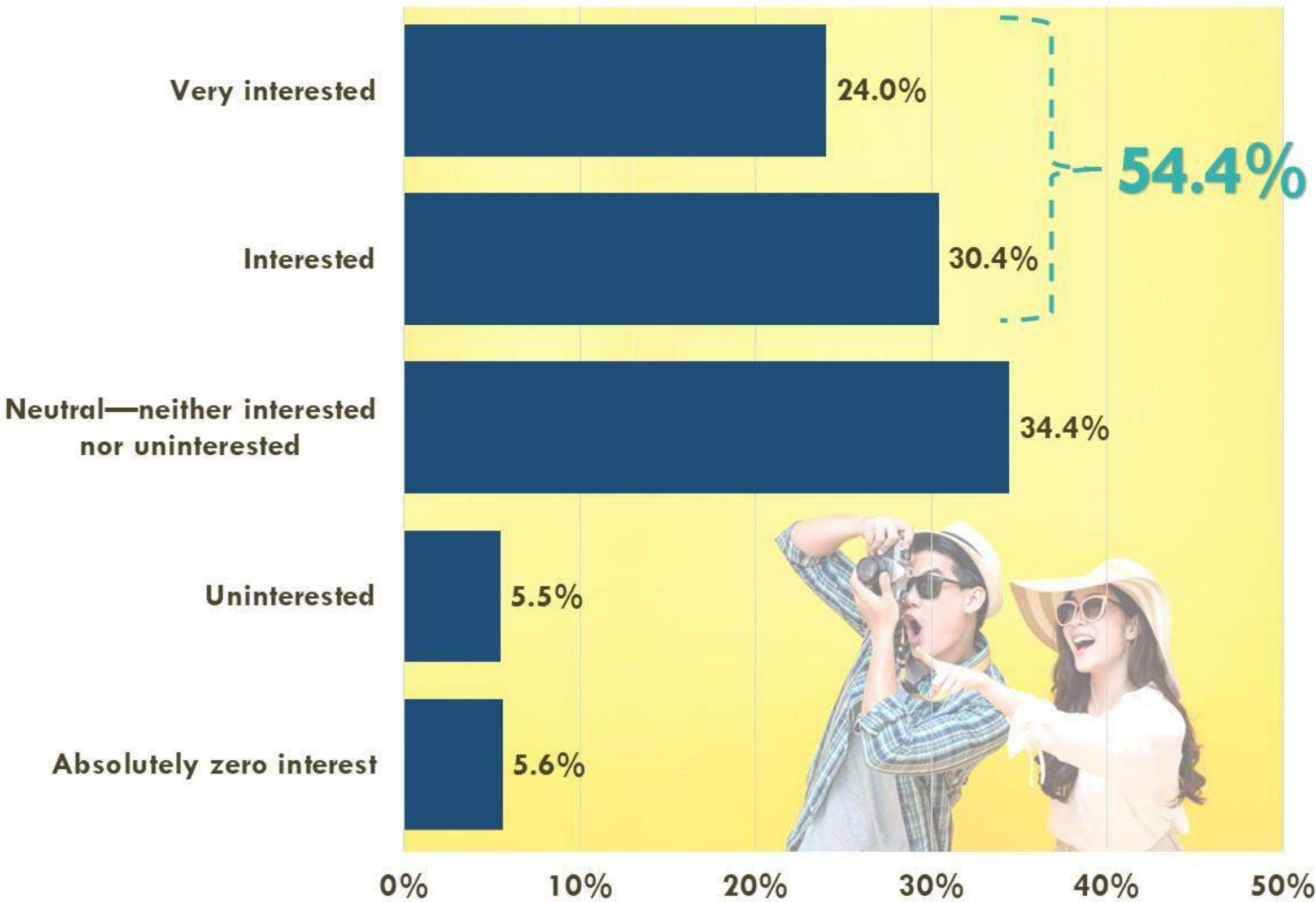
Interest in Using Visitor Information Centers This Year

INTEREST IN USING VISITOR INFORMATION CENTERS THIS YEAR AS OF MARCH 7, 2021

As more Americans travel through and post this pandemic, will they be open to visiting physical visitor information centers?

In total, 45.3% of American travelers say they have used a Visitor Information Center on a trip in the last 5 years. Well over half—54.4%—say they would be interested in using a Visitor Information Center on their domestic trips this year. In fact, relatively few express being uninterested (11.1%).

In terms of their expectations for these centers, they largely want the traditional--recommendations from staff and physical brochures—with the pandemic principles of masking and distancing.



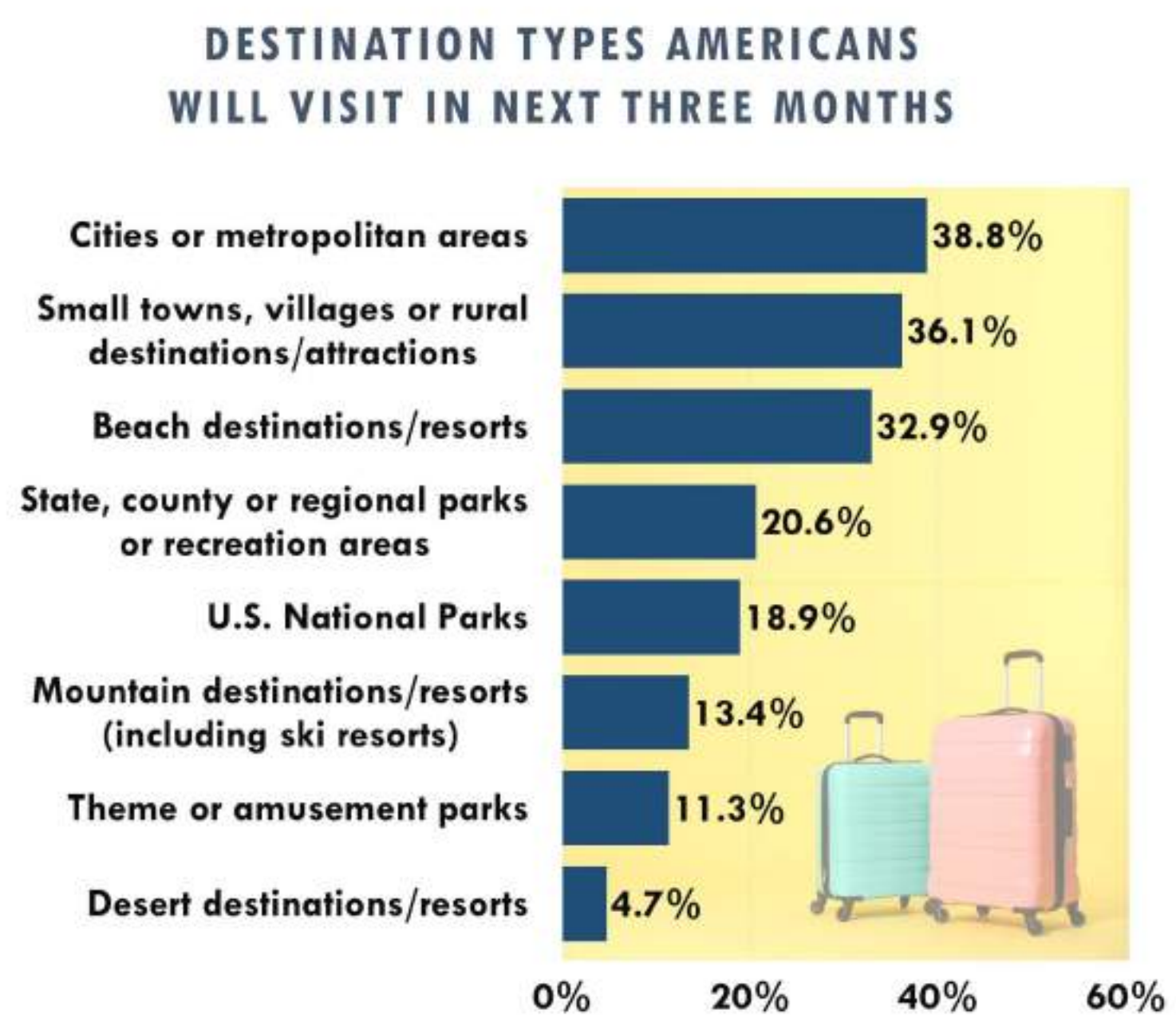
Question: How interested would you be in using a visitor information center on any of your domestic trips in this year?

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)

Tracking Urban Tourism Recovery

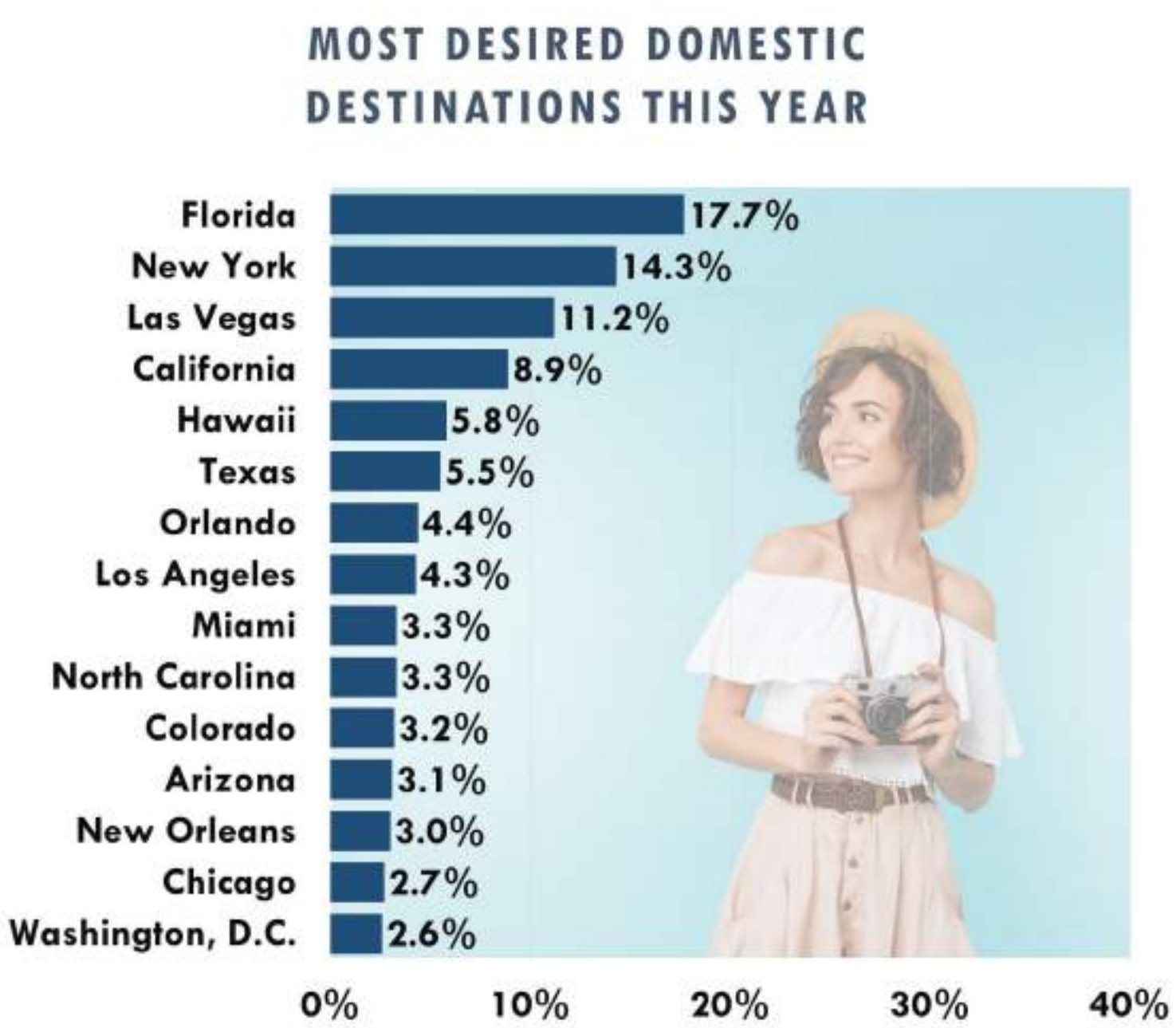
After suffering from the cancellation of convention and business travel in combination with travelers’ pandemic-induced leaning towards outdoor, rural environments, urban destinations continue on their paths of tourism recovery. **This week, 38.8% of travelers taking leisure trips in the next 3 months report they will visit an urban destination, outpacing rural and beach.** In addition, several iconic U.S. cities are back on the Hot List of the domestic destinations Americans name as one of the destinations they most want to visit in 2021.

TRACKING URBAN TOURISM RECOVERY AS OF MARCH 7, 2021



Question: On these leisure trips, which of the following are you expecting to visit?

(Base: Wave 52 data. Respondents who expect to take a leisure trip during the next three months, 712 completed surveys. Data collected March 5-7, 2021)



Question: Which domestic destinations do you most want to visit this upcoming year? (Write in up to three)

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)

Expected Business Travel Changes

As urban recovery is linked to business travel, this week our study once again examined business travel behaviors and perspectives on if and how it will be different going forward.

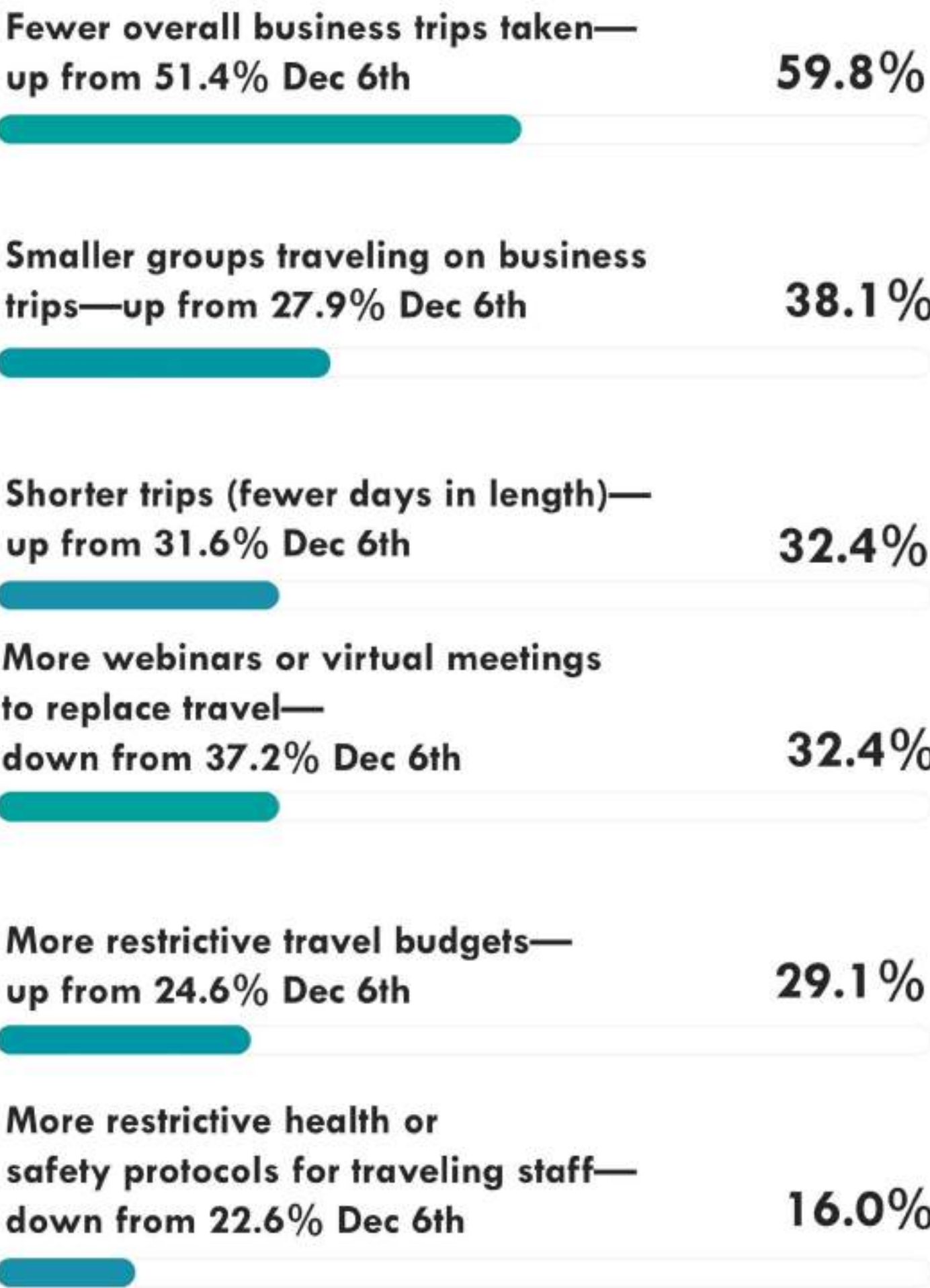
Almost half of those employed by companies with business travel as part of their operations report that business travel has now resumed—nearly twice what it was six months ago. Of those who traveled for business prior to the pandemic, 49.5% feel the pandemic has or will change the way their employer does business travel. The most common way? Fewer trips overall, at 59.8%, up from 51.4% the week of December 7th. Also up is the percent who feel there will be a reduction in travel group size and budgets. Perhaps most alarmingly, 53% of business travelers currently agree they hope to not travel as much for work as they did prior to the pandemic. Hopefully, for this aspect of the industry, these attitudes shift as pre-pandemic/normal patterns resume.

(Base: Waves 39 & 52 data. Respondents who have taken business trip(s) in the past two years, 166 & 193 completed surveys. Data collected December 4-6, 2020 & February 19-21, 2021)

EXPECTED BUSINESS TRAVEL CHANGES AS OF MARCH 7, 2021



ANTICIPATED BUSINESS TRAVEL CHANGES



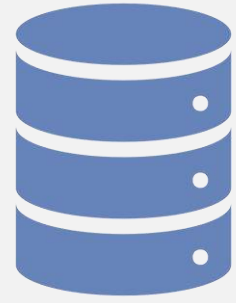


Coronavirus Travel Sentiment Index

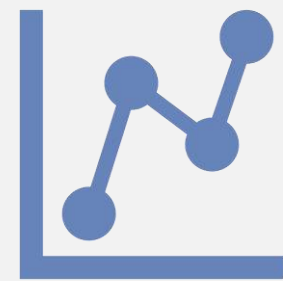
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of March 7th

What is a Predictive Index?



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



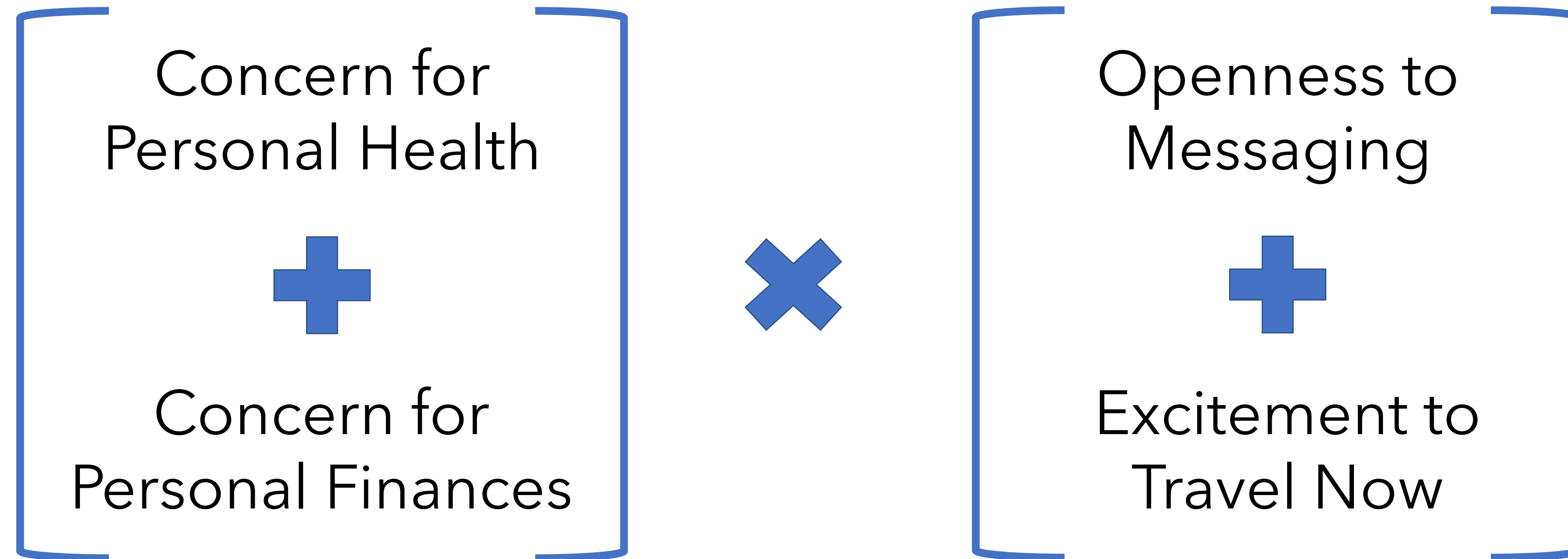
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

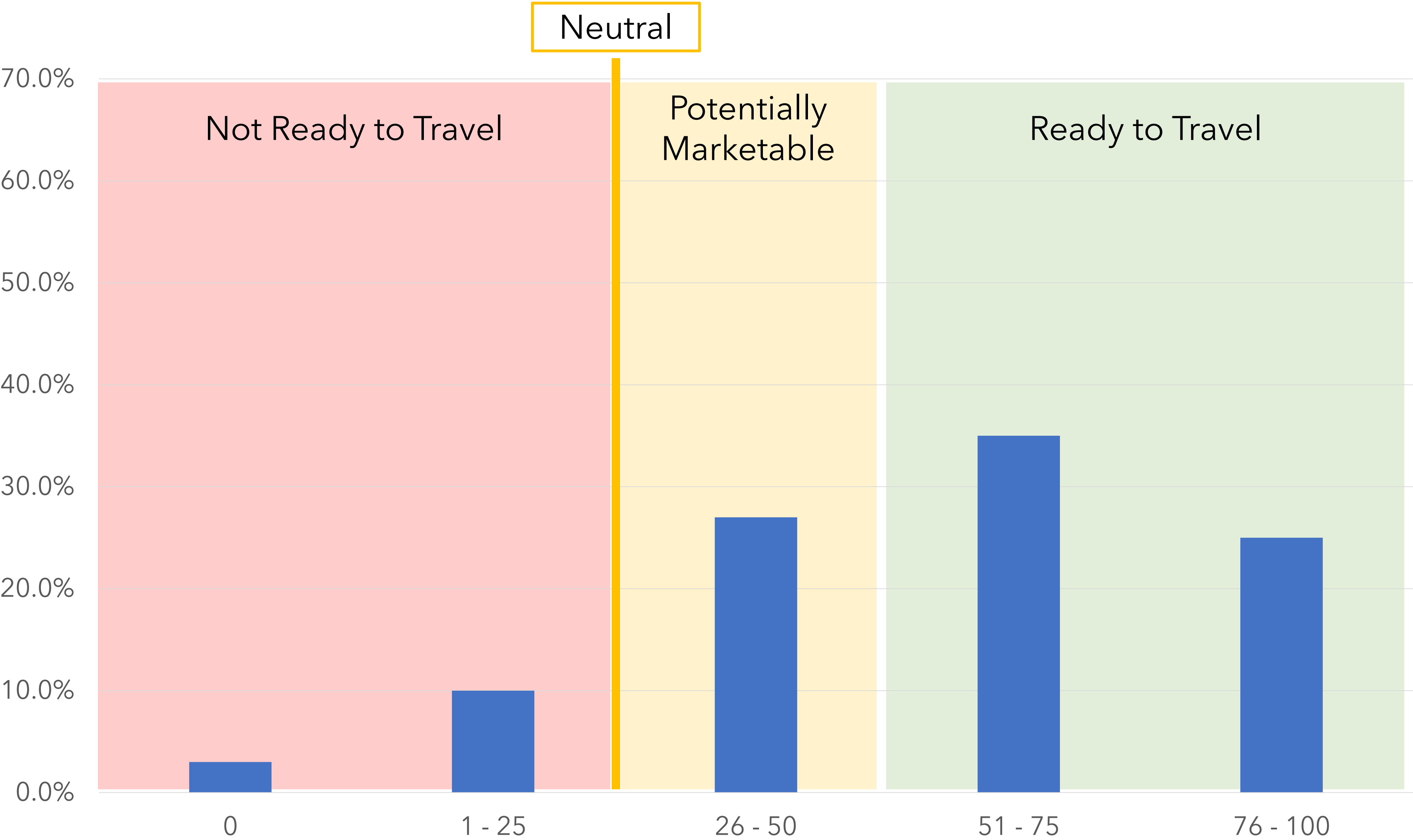
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



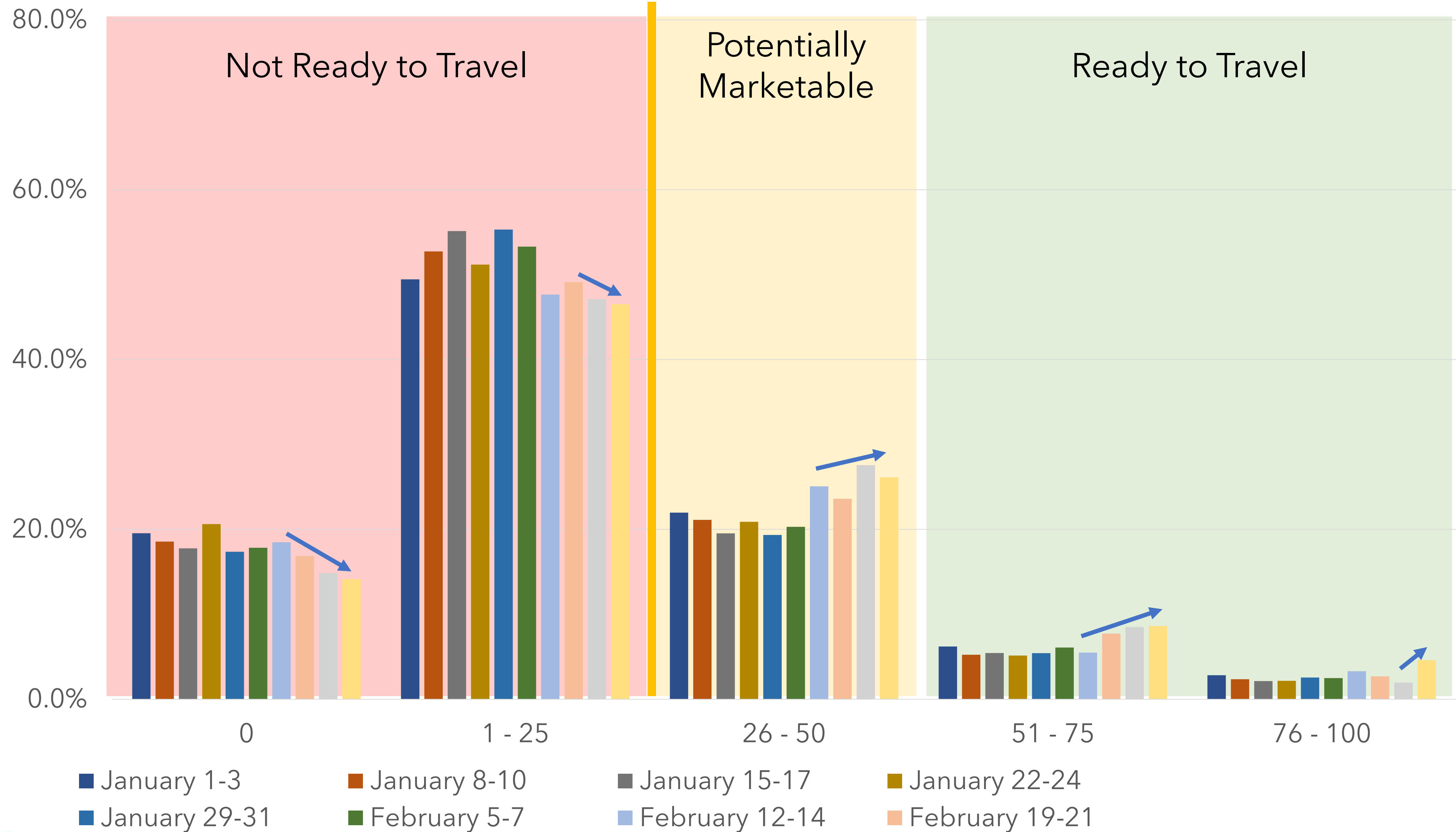
*Normalized to a 100pt scale

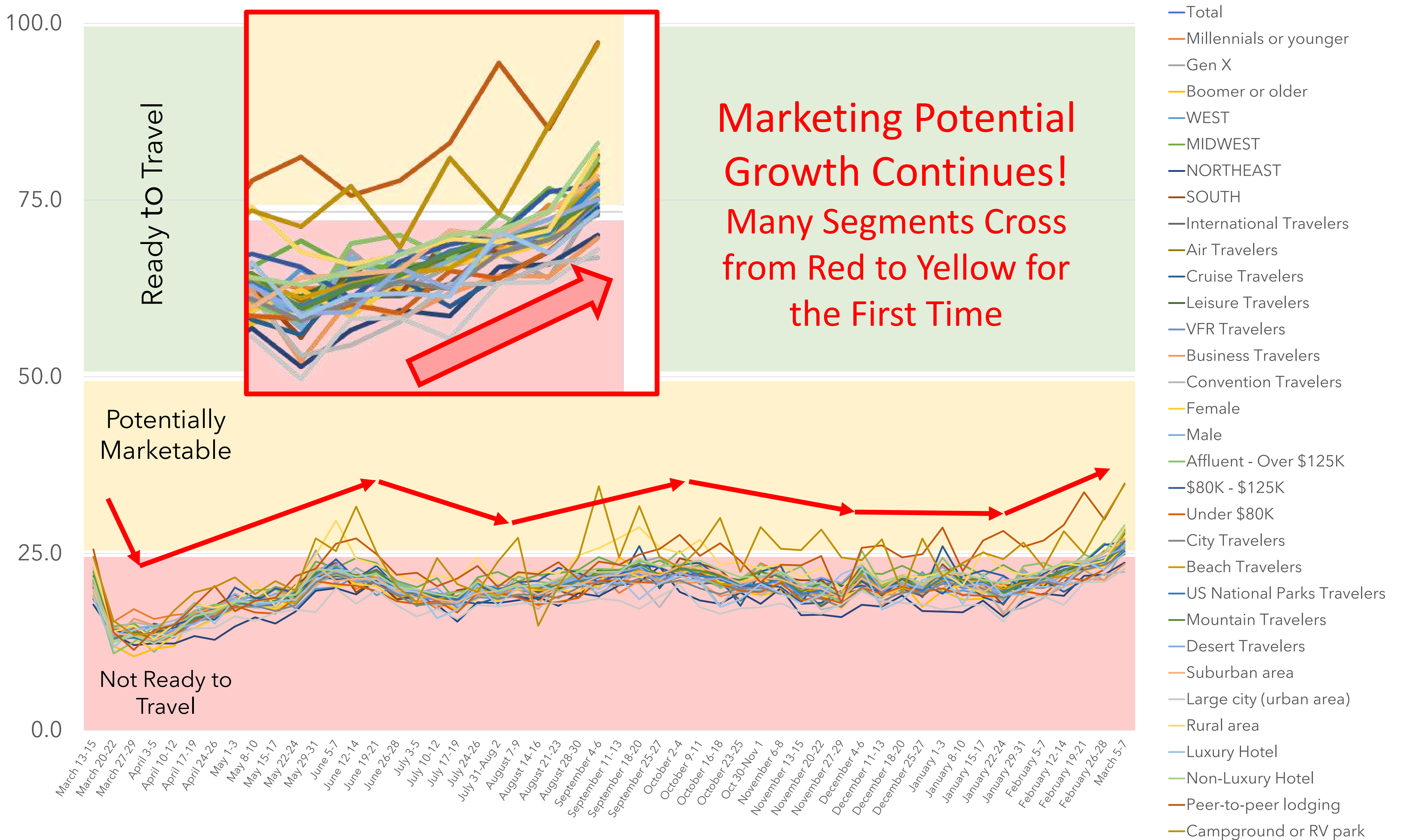
Healthy Travel Outlook

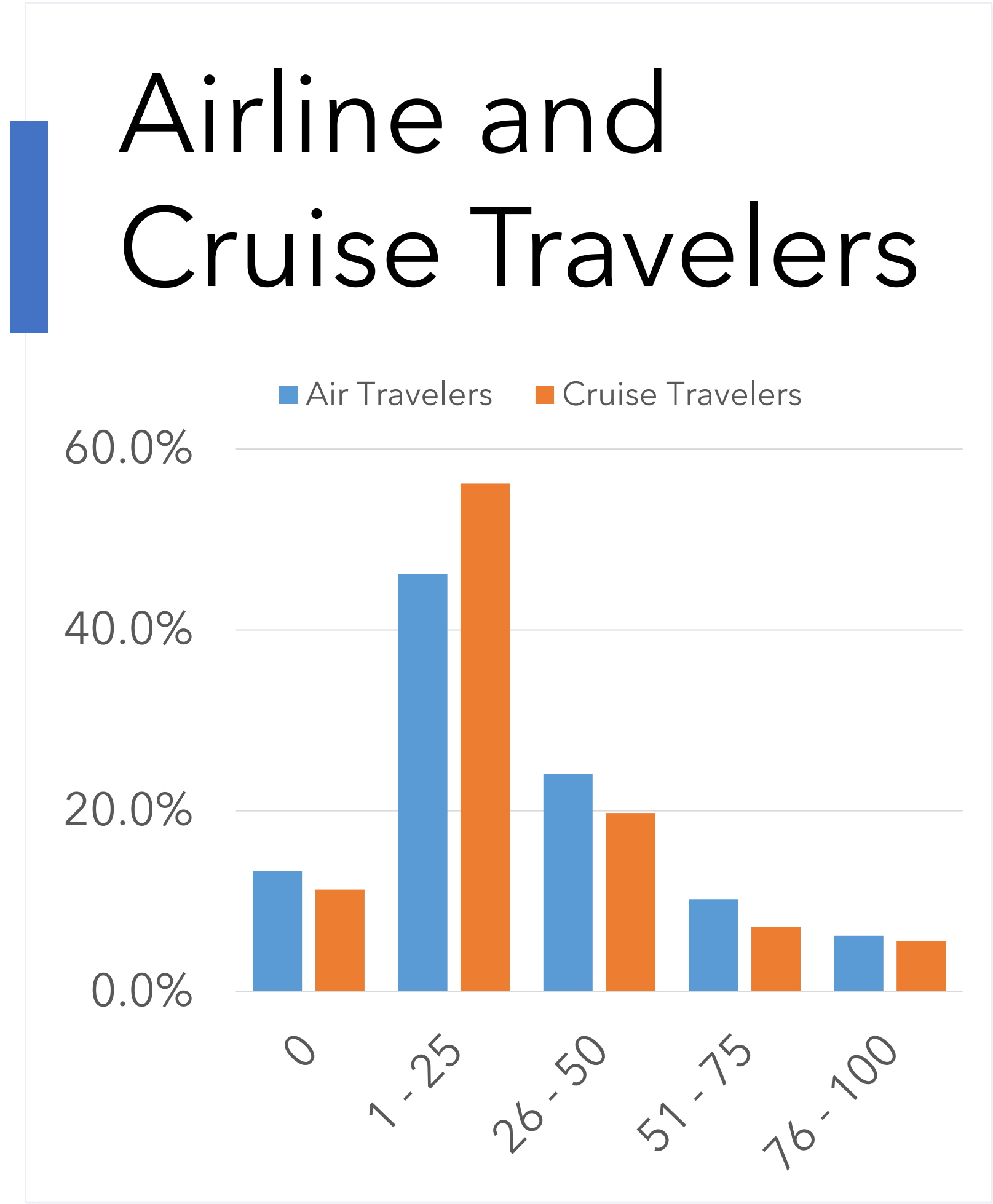


Travel Outlook

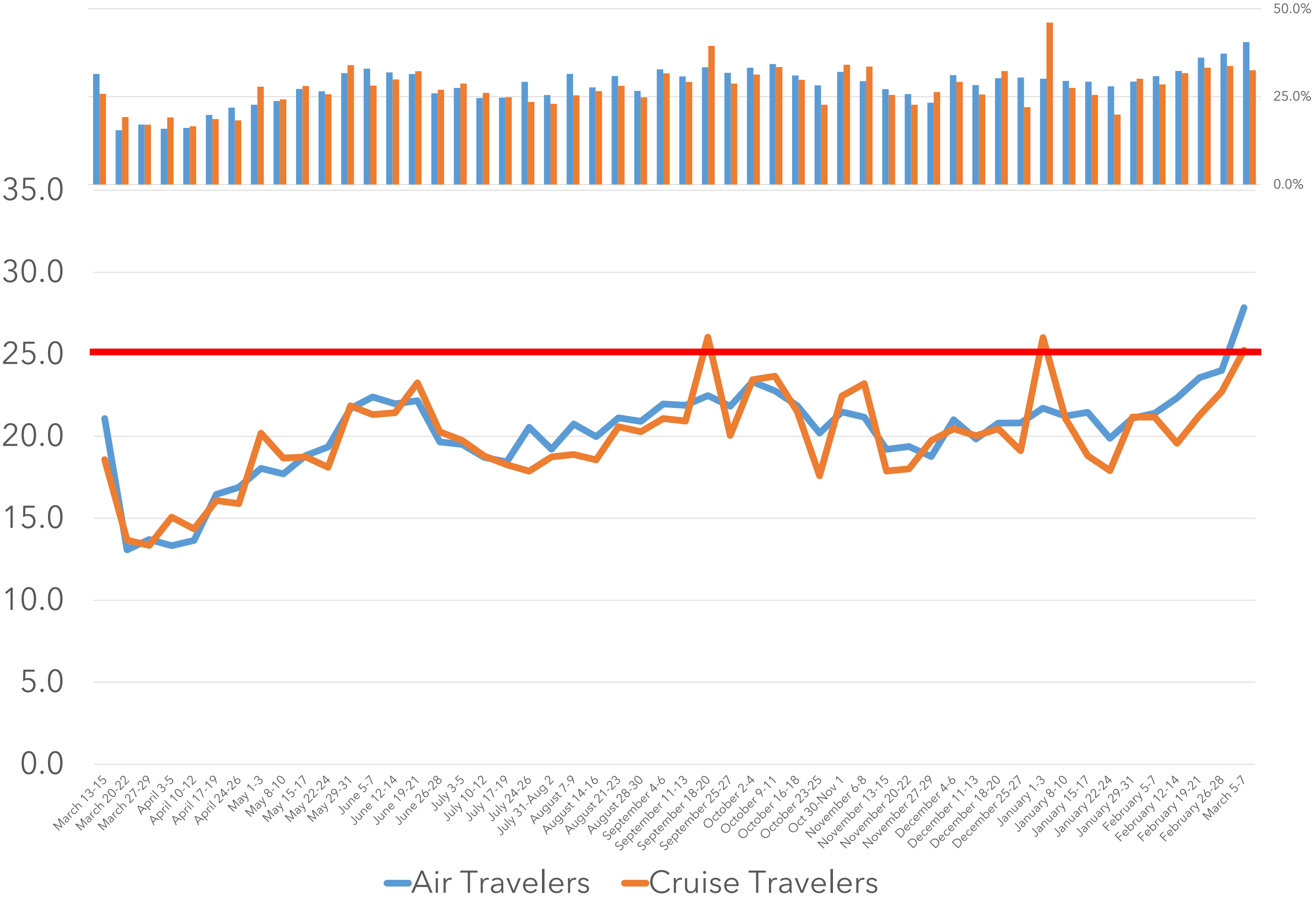
Neutral

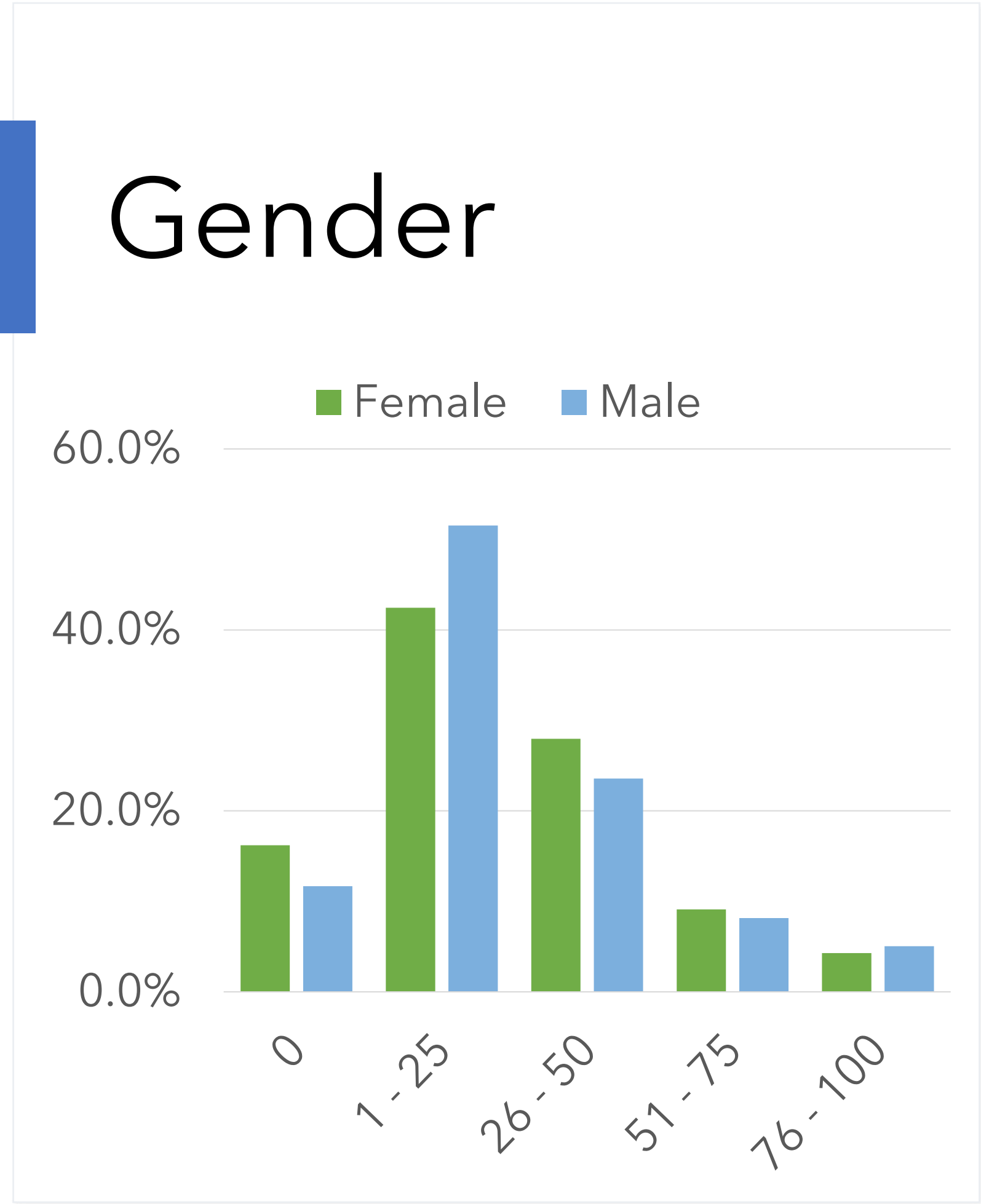




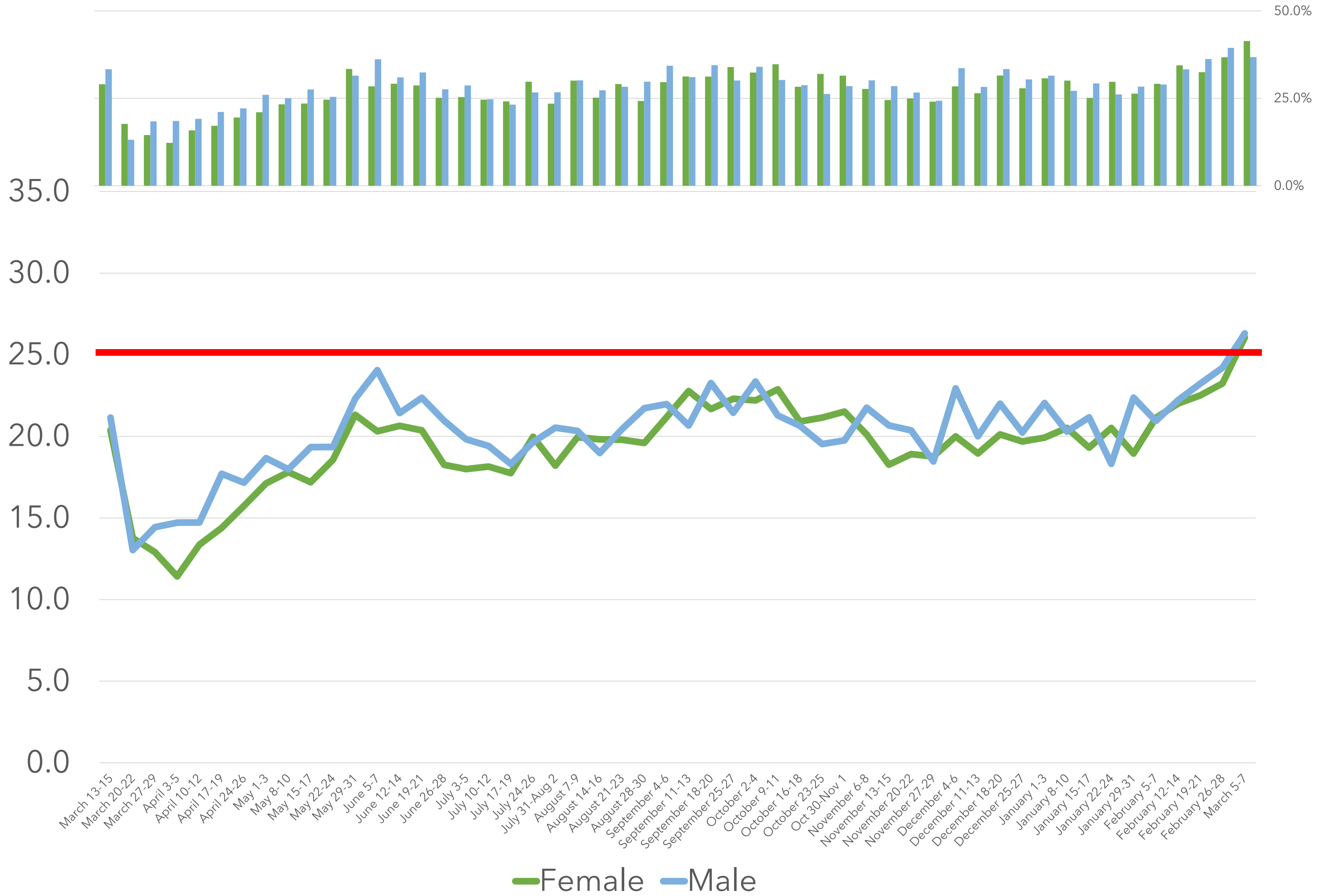


Percent Potentially Marketable
(Index Above 25)





Percent Potentially Marketable
(Index Above 25)

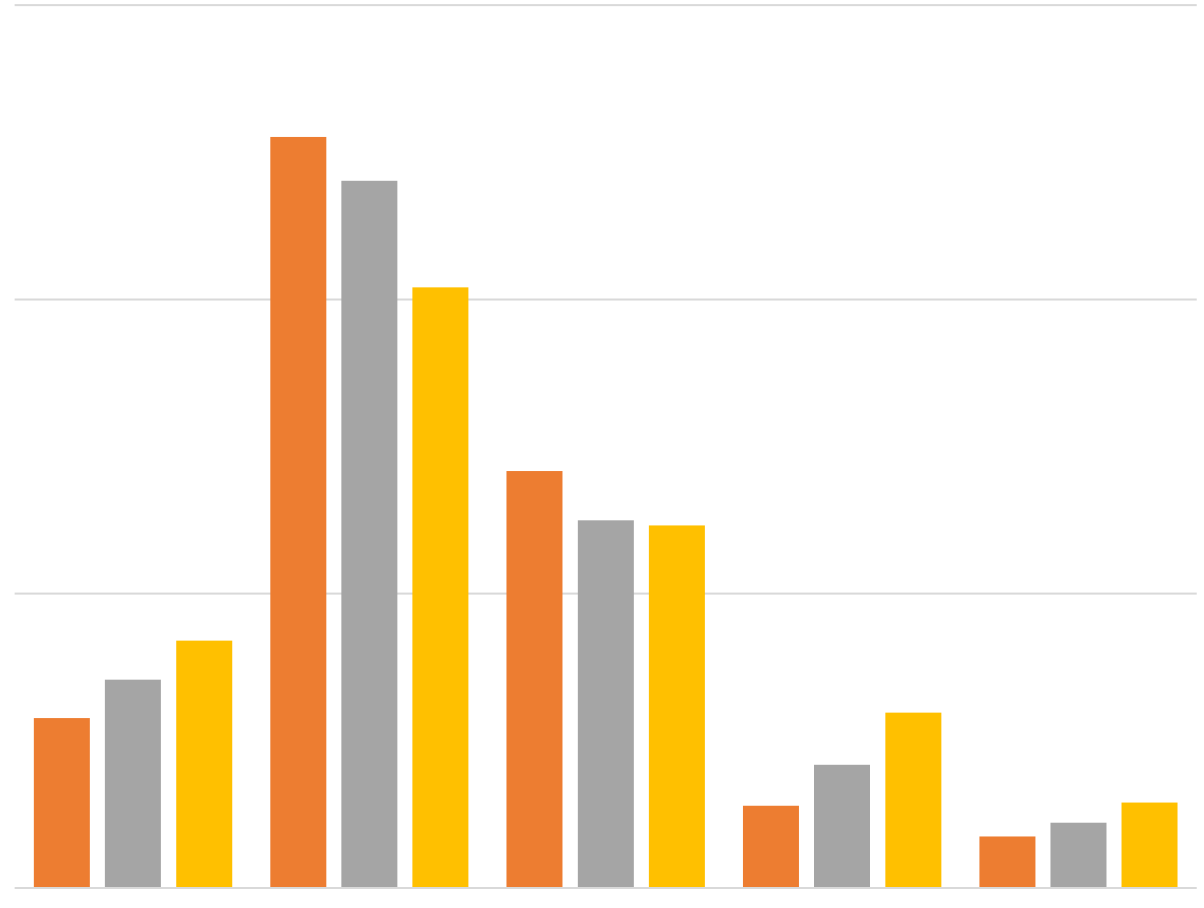


Generation

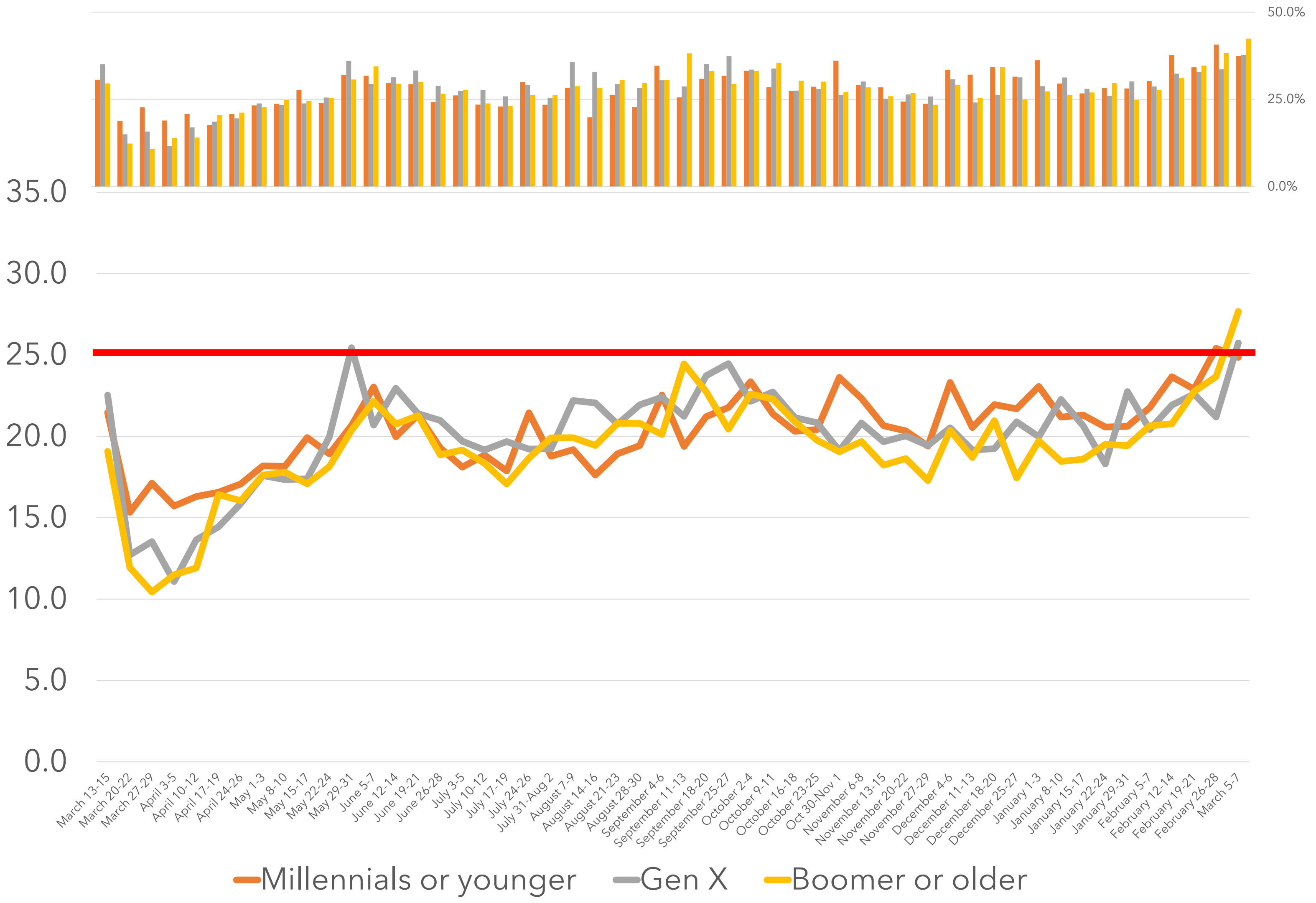
Millennials or younger Gen X Boomer or older

60.0%
40.0%
20.0%
0.0%

0
1 - 25
26 - 50
51 - 75
76 - 100



Percent Potentially Marketable (Index Above 25)



Millennials or younger Gen X Boomer or older

US Regions

WEST MIDWEST NORTHEAST SOUTH

60.0%

40.0%

20.0%

0.0%

0

1 - 25

26 - 50

51 - 75

76 - 100

Percent Potentially Marketable (Index Above 25)

35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0

50.0%
25.0%
0.0%

0.0

5.0

10.0

15.0

20.0

25.0

30.0

35.0

WEST

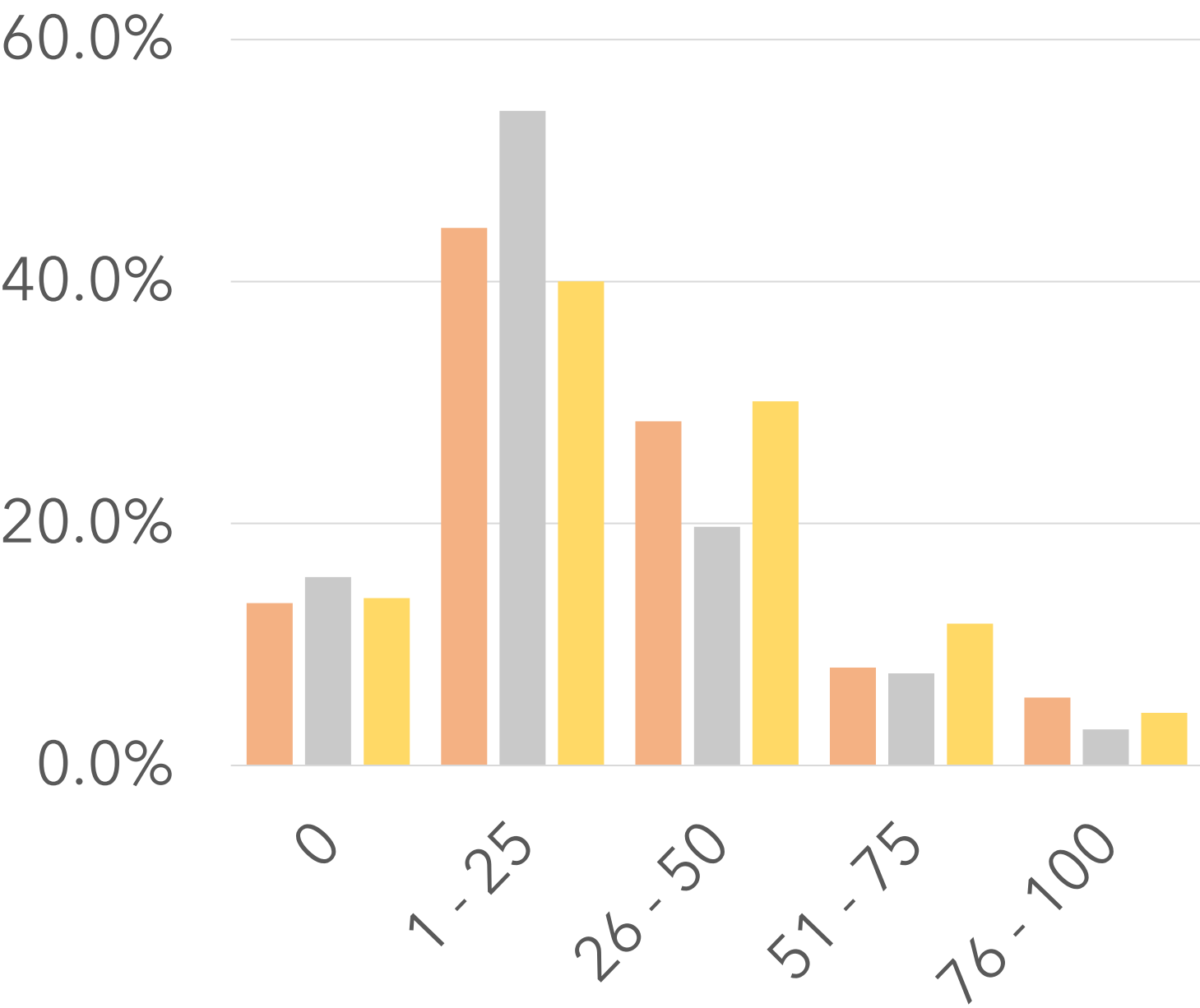
MIDWEST

NORTHEAST

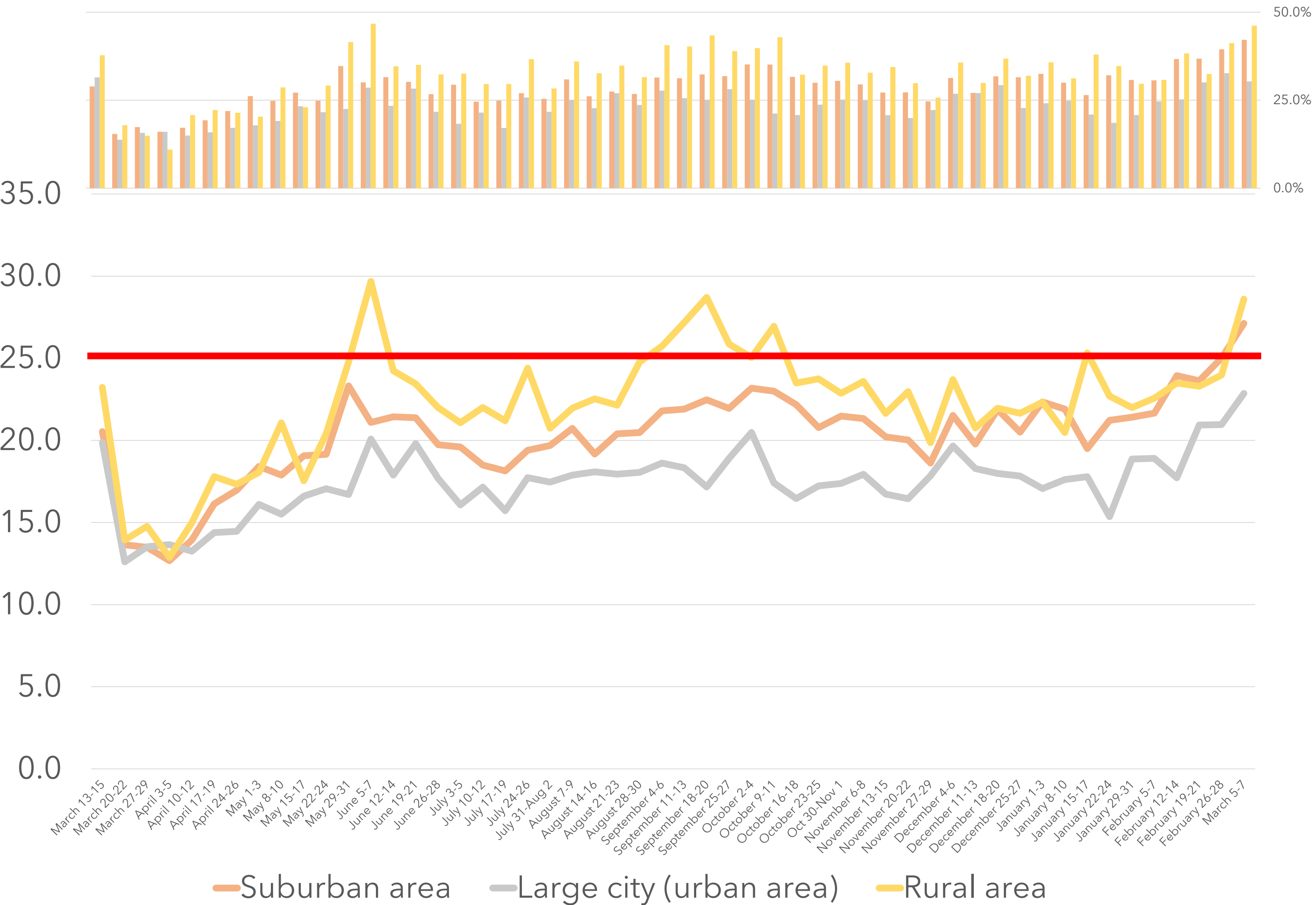
SOUTH

Residence Type

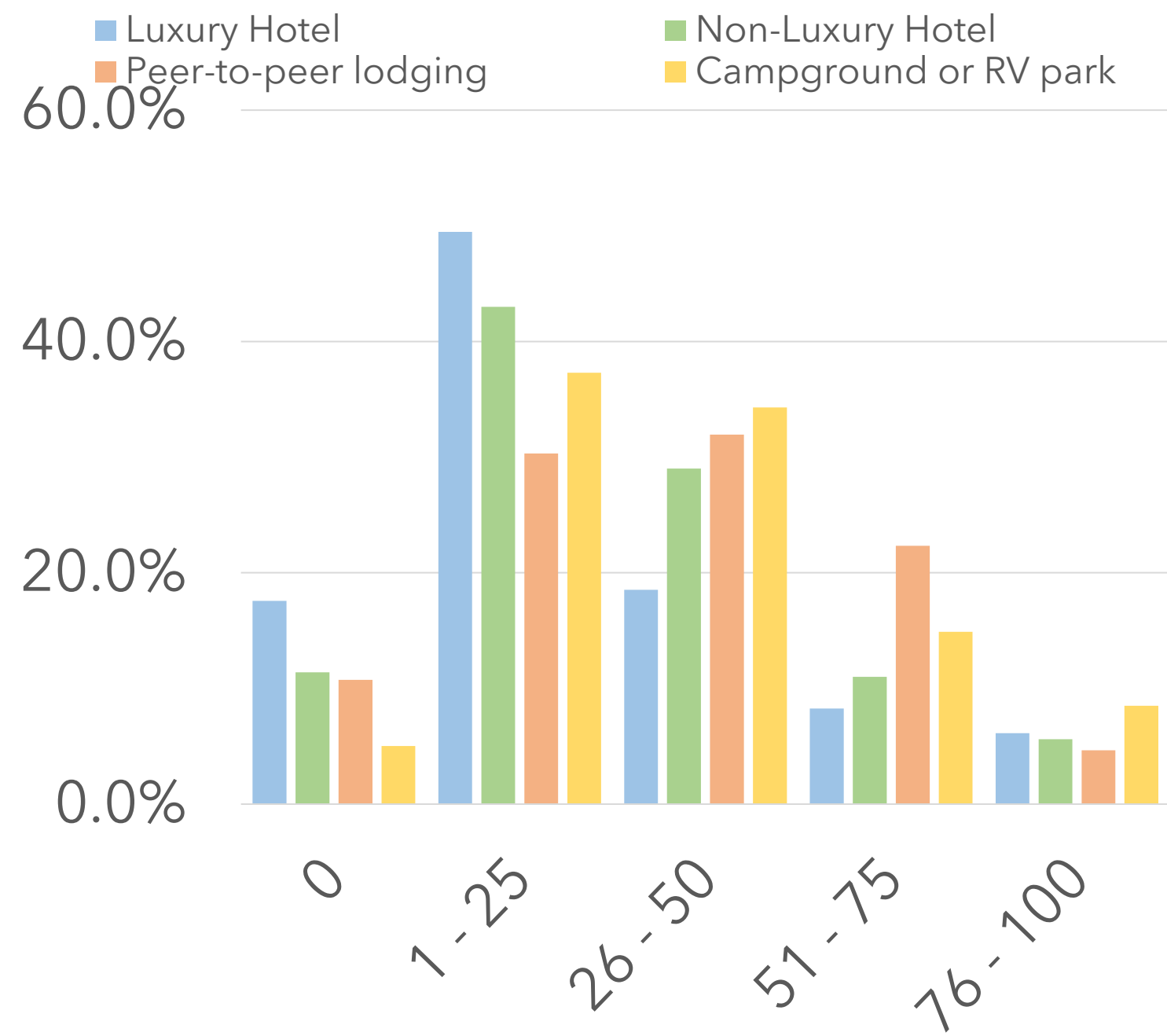
Suburban area Large city (urban area) Rural area



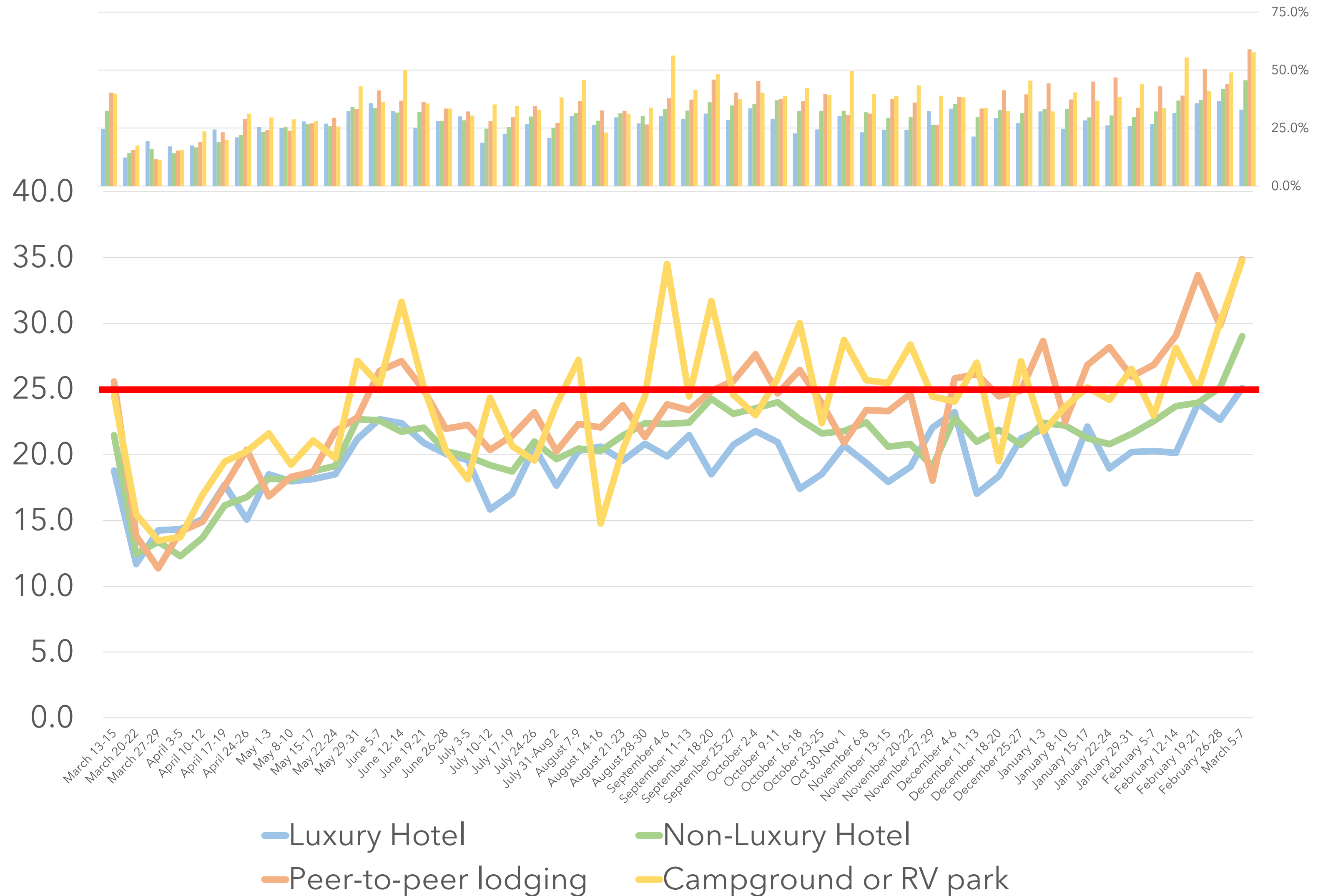
Percent Potentially Marketable (Index Above 25)



Lodging Preference



Percent Potentially Marketable (Index Above 25)





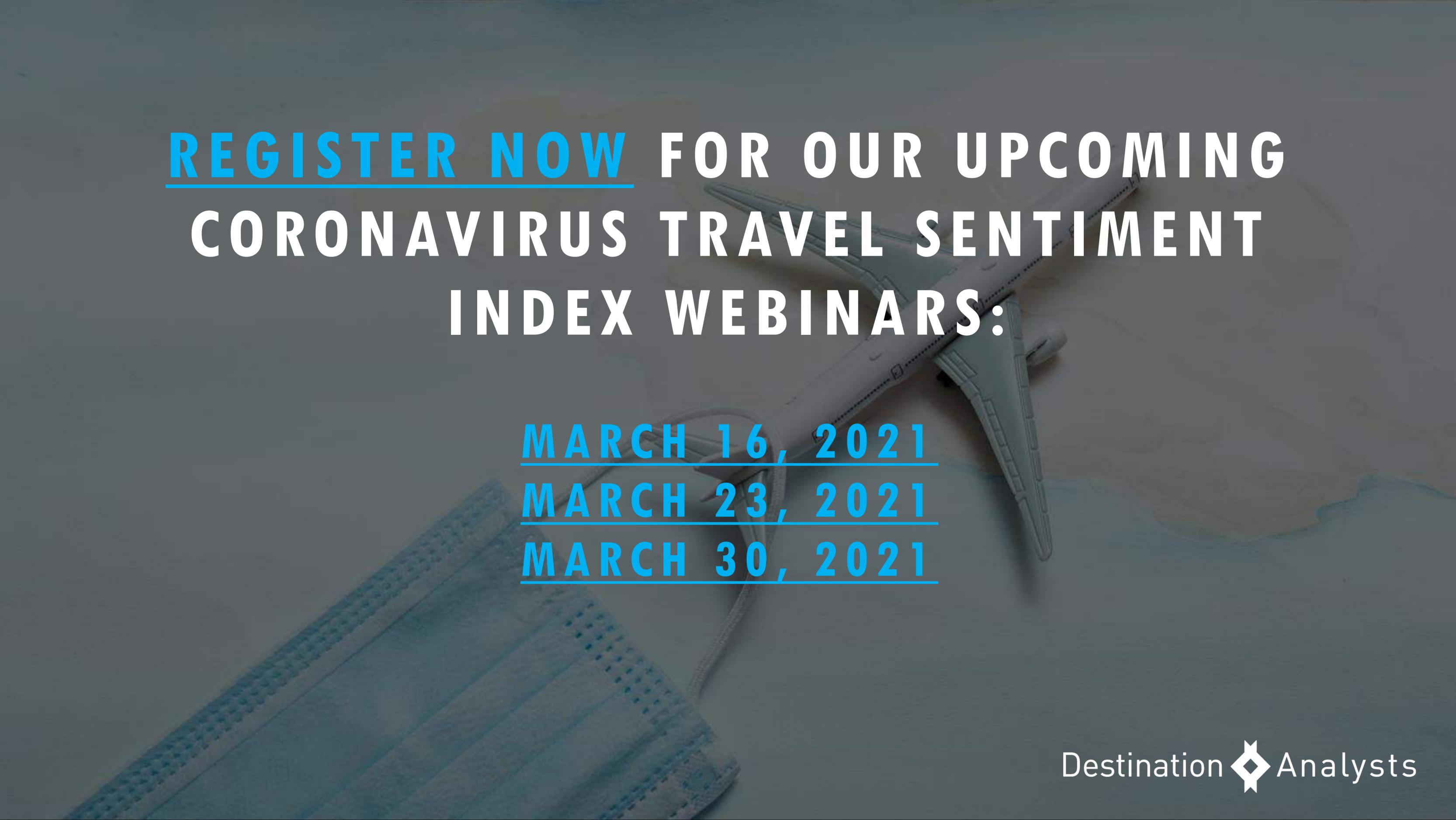
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Information?

- 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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