CORONAWIRUS TRAWEL SENTIMENT INDEX REPORT KEY FINDINGS—WEEK OF APRIL 12TH, 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.

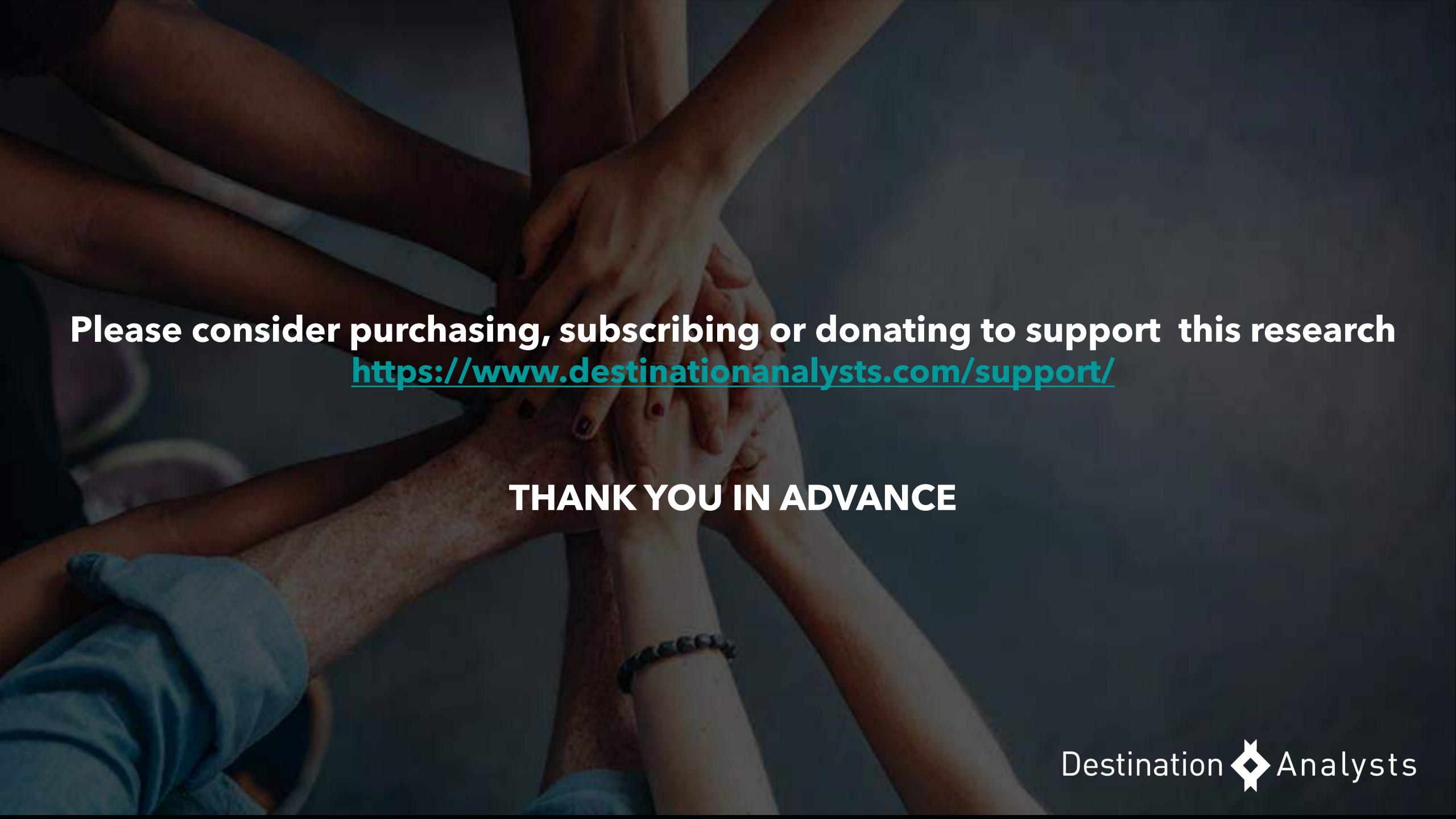
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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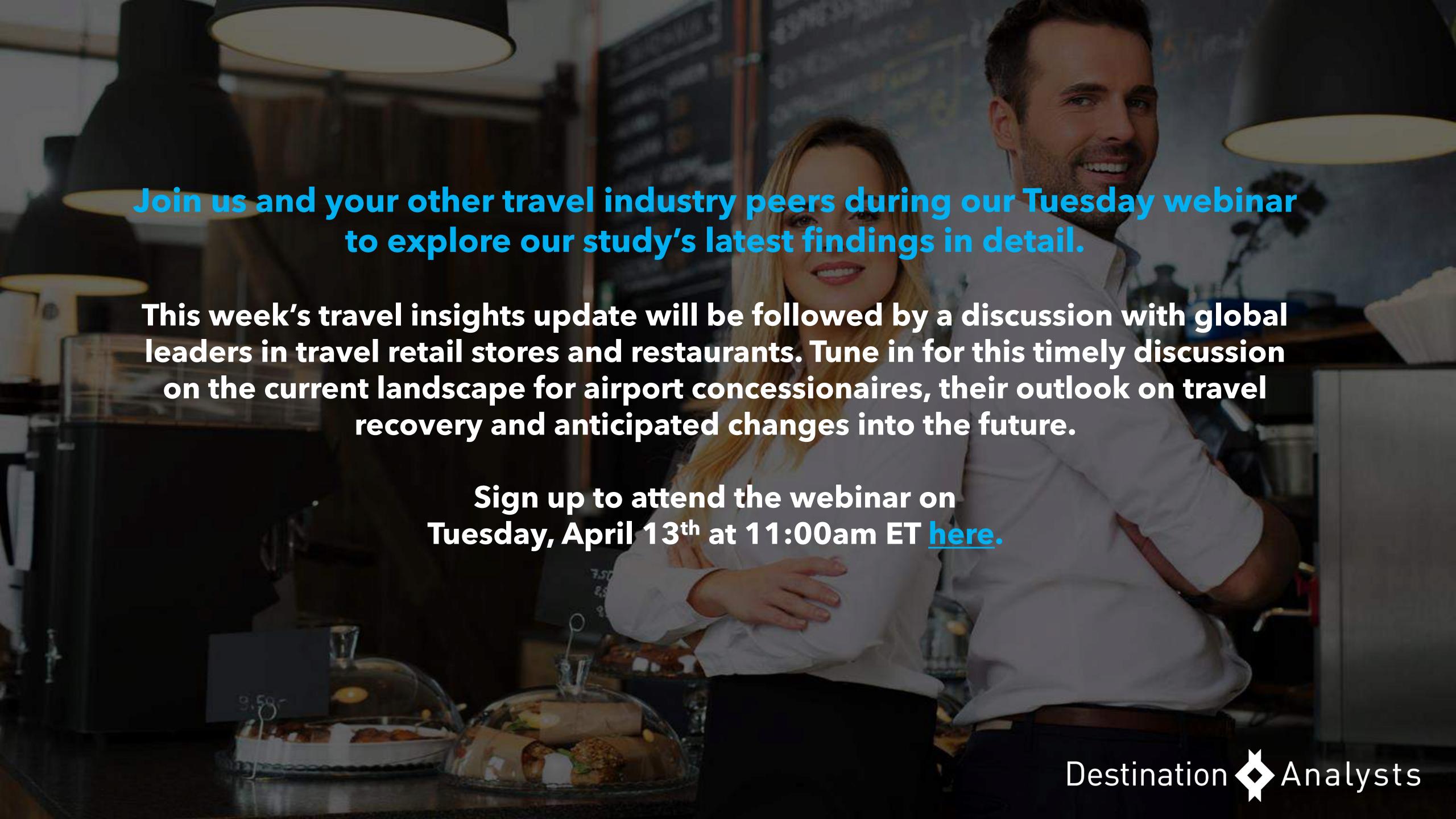


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Travel Activities Perceived as Unsafe

As of this week, over 27% of the U.S. adult population is vaccinated against COVID-19 and the proportion of Americans highly concerned about their family or friends contracting the virus is now at an all-time low.

Yet with cases rising in some regions and the pandemic ongoing, Americans have been exhibiting a lessening optimism over the last month, after reaching a pandemic peak the week of March 14th. Compared to a month ago, those who feel the coronavirus situation in the U.S. will improve over the next four weeks has declined nearly 15 percentage points (45.5% from 60.3%), while nearly twice as many now feel things are going to get worse (21.3% from 11.1%).

Nevertheless, fear about travel has continued on a course of steady decline. Of the travel and leisure activities we track, only a handful remain perceived as unsafe by a majority of American travelers. In fact, the average perception of these activities as unsafe is down 20 percentage points from January 1st—a pandemic record low (37.9%). Those who would NOT feel guilty traveling now exceeds those who would (39.1% vs 36.7%). And more than two-thirds have a "ready-to-travel" state-of-mind.

FEW TRAVEL ACTIVITIES REMAIN LARGELY PERCEIVED AS UNSAFE

AS OF APRIL 11, 2021

A MAJORITY NO LONGER FEEL UNSAFE WITH:



Attending a conference or convention (48.5%)



Go to a casino (47.4%)



Sporting events - Large venue (47.3%)



Train travel (intercity travel) (45.9%)



Attending a performance (44.5%)



Sporting Events - Small venue (42.9%)



Traveling in a taxi/Uber/Lyft commercial airline (42.0%)



Traveling on a (40.9%)



Traveling for business reasons (38.2%)



A MAJORITY STILL

FEEL UNSAFE WITH:

Traveling outside the **United States** (56.0%)



Staying in an Airbnb or home rental (35.9%)



Visiting indoor attractions (32.0%)



Visiting outdoor attractions (29.9%)



Visiting an observation deck (29.1%)



Dining in a restaurant (28.6%)



Traveling on

a cruise line

(57.0%)

Intercity bus travel (55.6%)



Traveling by bus or motor coach on a group tour (54.5%)



Staying in a hotel (24.9%)



Visiting friends and relatives (19.3%)



shopping (18.7%)



Non-team outdoor recreation (18.3%)



Taking a road trip (13.9%)

Question: At this moment, how safe would you feel doing each time of travel activity?

(Base: Wave 57 data. All respondents, 1,202 completed surveys. Data collected April 9-11, 2021)



Motivations Behind Americans' Next Leisure Trip

The readiness around travel has resulted in a lot of travel plans.

Over 86% of American travelers currently have at least tentative leisure travel plans and 72.8% expect to travel for leisure within the next three months alone. In terms of what is motivating Americans to travel right now, while relaxing, getting away from their daily life and spending time with family remain important, about half are highly seeking escaping boredom, having new experiences and visiting new places they have neve been. One-third are out to party while a quarter are even traveling specifically to meet new people.

Question: How important are each to why you will be traveling for your next leisure trip? (Use the scale below to evaluate the importance of each)

(Base: Wave 57 data. Respondents who expect to take 1 or more trip(s) in 2021, 960 completed surveys. Data collected April 9-11, 2021)

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MOTIVATIONS BEHIND AMERICANS' NEXT LEISURE TRIP

AS OF APRIL 11, 2021

(Percent rating each as "Important" or "Critically important")



RELAX OR ESCAPE STRESS (64.8%)



GET AWAY FROM MY DAILY LIFE (59.8%)



SPENDING TIME WITH FAMIY (59.7%)

- Many Travelers Seeking Newness ----



BOREDOM (51.4%)



HAVE NEW EXPERIENCES (48.1%)



PLACES (44.8%)



FOR MY CHILDREN (35.3%)



PARTY, HANG OUT, HAVE FUN (33.5%)



MEET NEW PEOPLE (23.0%)

Americans' Most Desired Domestic Destinations—Top 20

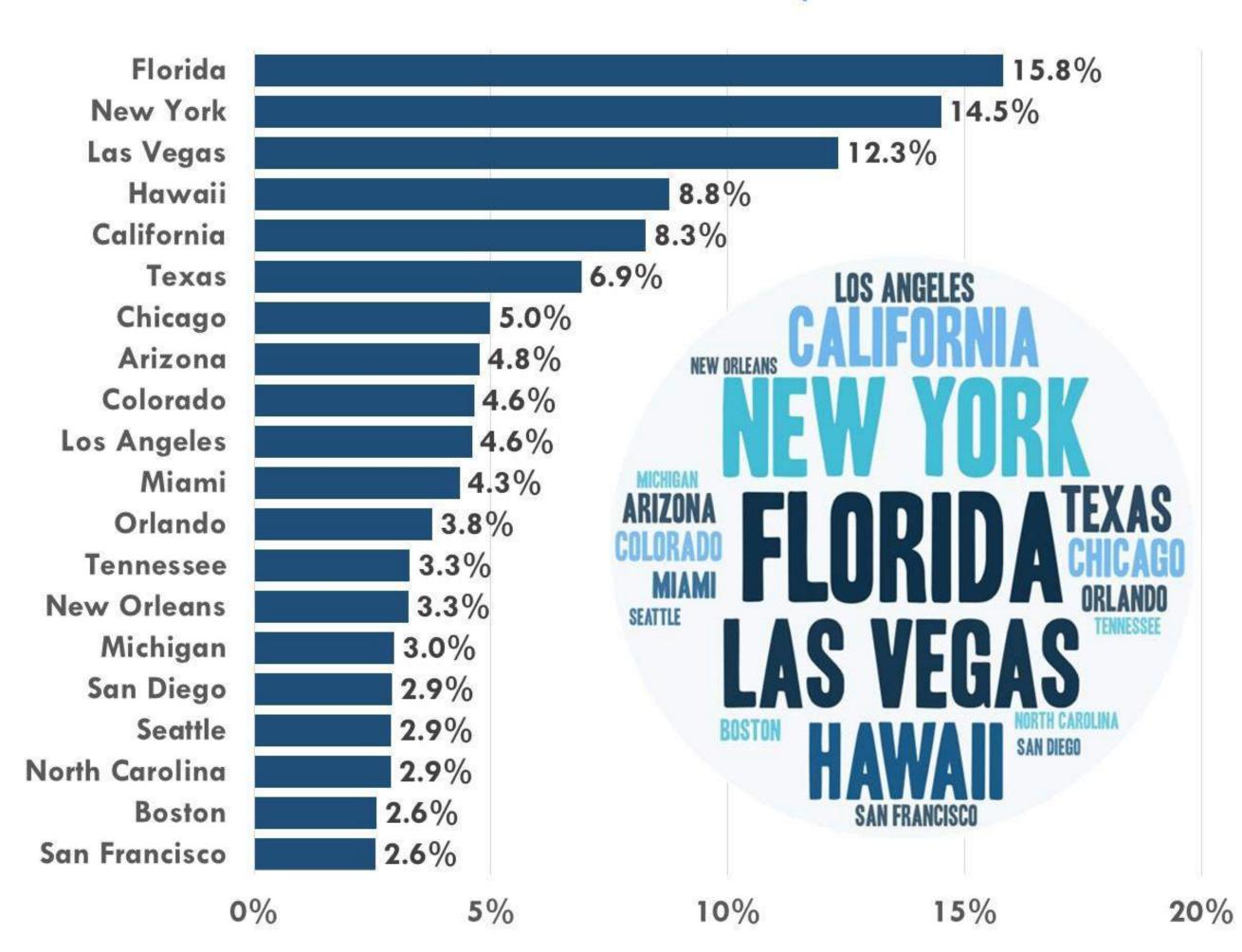
As Americans look out on their travel in the months ahead, many iconic tourism spots—Florida, Las Vegas, New York, Hawaii, California--top their lists of the domestic destinations they most want to visit, including popular cities, from Chicago to New Orleans.

Question: Which domestic destinations do you most want to visit this year? (write in up to three) (please only include destinations in the United States)

(Base: Wave 57 data. All respondents, 1,202 completed surveys. Data collected April 9-11, 2021)

AMERICANS' MOST DESIRED DOMESTIC DESTINATIONS

TOP 20 AS OF APRIL 11, 2021





Advanced Travel Bookings

In terms of Americans' timing on booking travel, the pandemic's impact can still be seen.

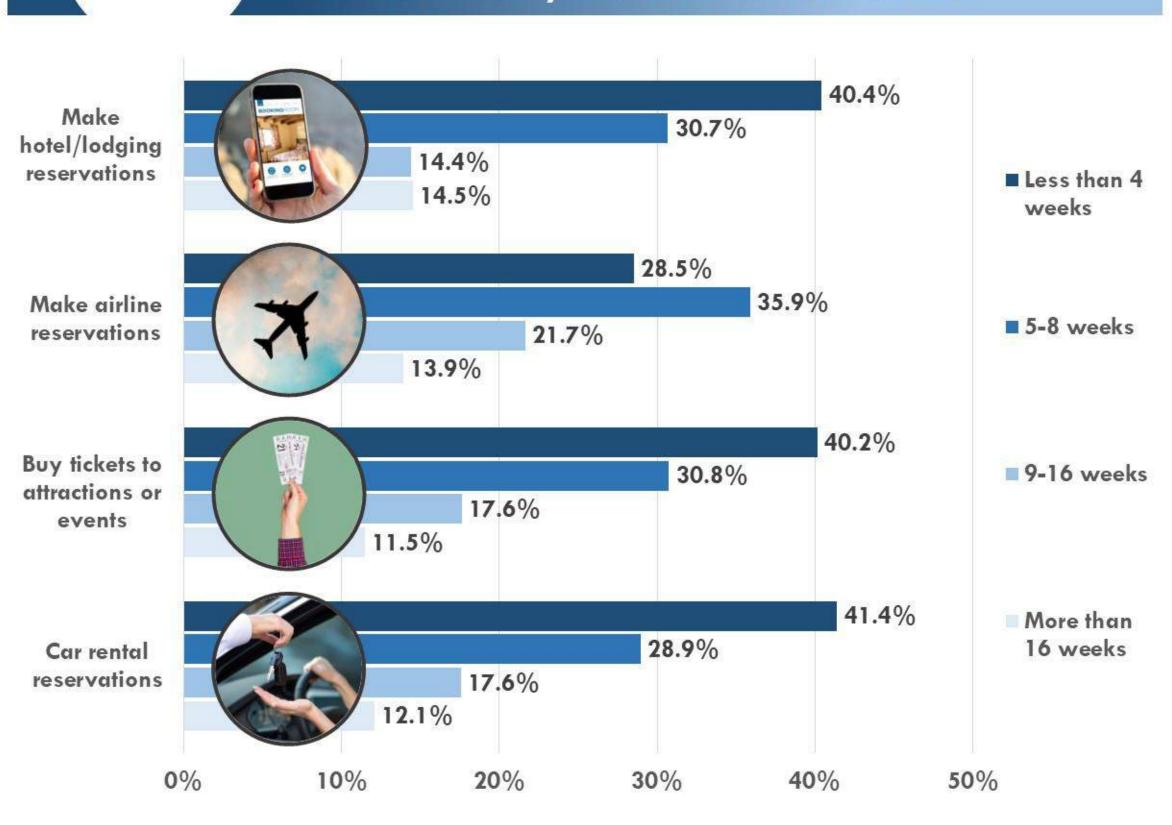
In total, 45.7% say they will make reservations closer to their travel date than they would in a normal year. Over 40% of travelers who will be making hotel, car rental, attraction and event bookings say they will be doing so less than 4 weeks out. Even 28.5% of upcoming air travelers say they will purchase their flights less than a month before travel. Given the high demand for travel, this short booking window preference may have consequences. Nevertheless, booking continues at a steady pace. This week, 13.9% of American travelers said they had made a travel reservation or booking in the last 7 days.

HOW FAR IN ADVANCE AMERICANS WILL BOOK TRAVEL

AS OF APRIL 11, 2021

45.7%

Will Make Reservations Closer to their Travel
Date than they would in a Normal Year



Question: For your next leisure trip, how far in advance will you (or did you already) begin making reservations? For each of the following, please use the scale to state how far in advance you will (or did) start making your reservations.

(Base: Wave 57 data. Respondents who expect to take 1 or more trip(s) in 2021, 960 completed surveys. Data collected April 9-11, 2021)

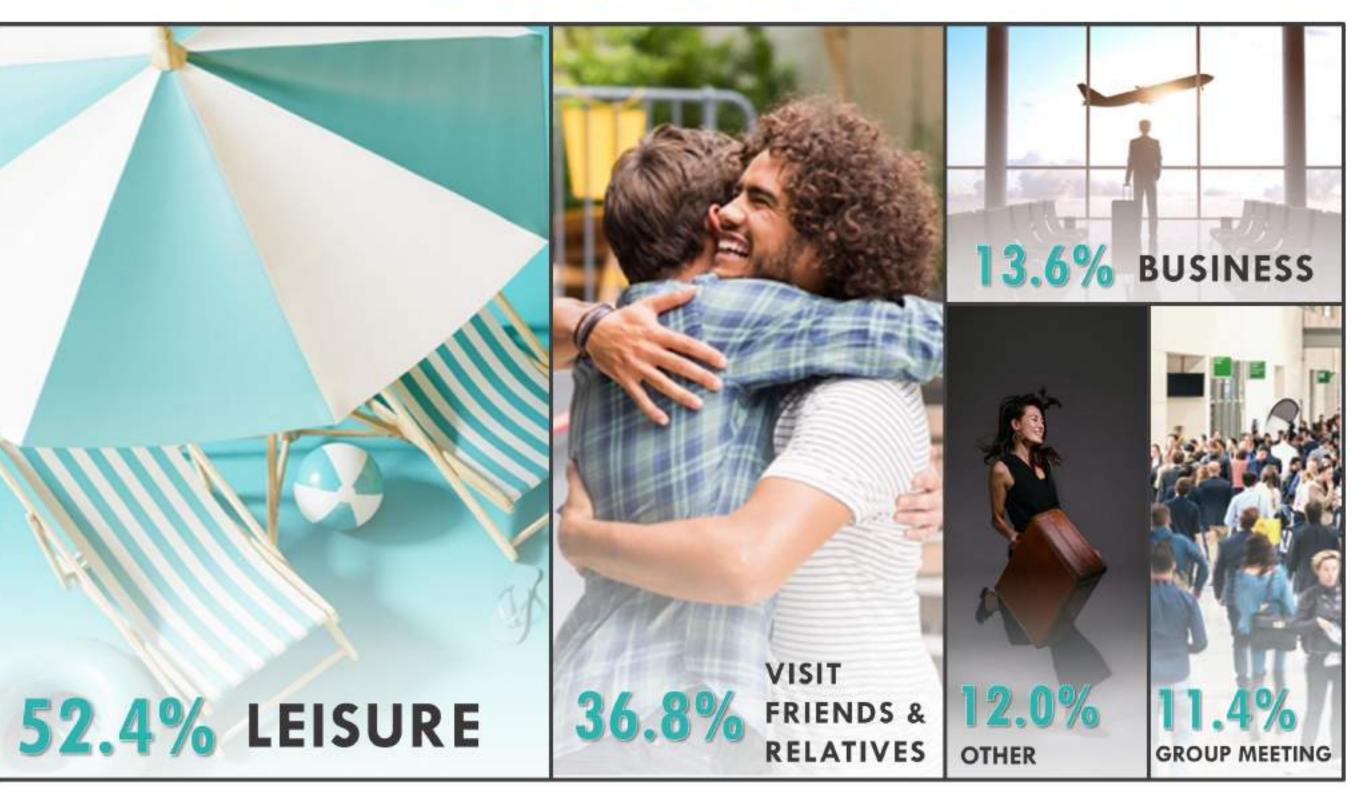


Travel Expected in the Next 3 Months

Looking at the types of travel Americans have planned for the next quarter, leisure travel is indeed leading the recovery with 52.4% planning a vacation or getaway and 36.8% traveling to visit friends or relatives. Business travel is further back in recovery. Right now, 13.6% of American travelers say they will be taking a business trip in the next 3 months and 11.4% say they have a convention/group meeting trip (Note: if we look at the business traveler segment alone, one-third say they will be taking a business trip this quarter). In a typical year pre-pandemic, about 20% of American travelers reported having upcoming business, convention or group meeting trips.

TRAVEL EXPECTED IN THE NEXT 3 MONTHS

AS OF APRIL 11, 2021



Question: Which of the following types of travel are you planning during the next 3 months?

(Base: Wave 57 data. All respondents, 1,202 completed surveys. Data collected April 9-11, 2021)



The Return to In-Person Meetings

This week we can celebrate that the appeal of attending in-person meetings has improved.

Over 54% of business travelers say they would be happy if their employer asked them to attend an in-person conference, convention or group meeting in the next six months. This is nearly double what was recorded last August. In addition, about 40% of American business travelers say they currently have plans to attend a conference/convention/group meeting this year.

Still, a meetings industry rebound may still be further into the future. Two-thirds of business travelers feel it won't be until this summer or later that they will be comfortable attending in-person meetings. The majority (56.4%) of business travelers still would prefer a virtual meeting to an in-person one if it were happening this month. Only 20 percent say they would prefer an in-person event right now.

(Base: Wave 57 data. Respondents traveling for business in the past 2 years, 373 completed surveys. Data collected April 9-11, 2021)

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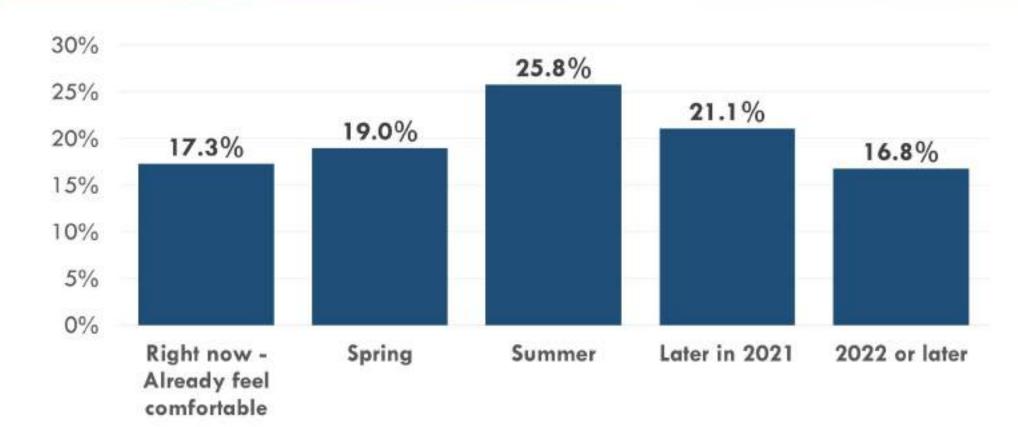
THE RETURN TO IN-PERSON MEETINGS

AS OF APRIL 11, 2021





WHEN AMERICAN BUSINESS TRAVELERS EXPECT TO FEEL COMFORTABLE ATTENDING IN-PERSON CONFERENCES/GROUP MEETINGS



Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing

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Highlights from the Week of April 12th



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.

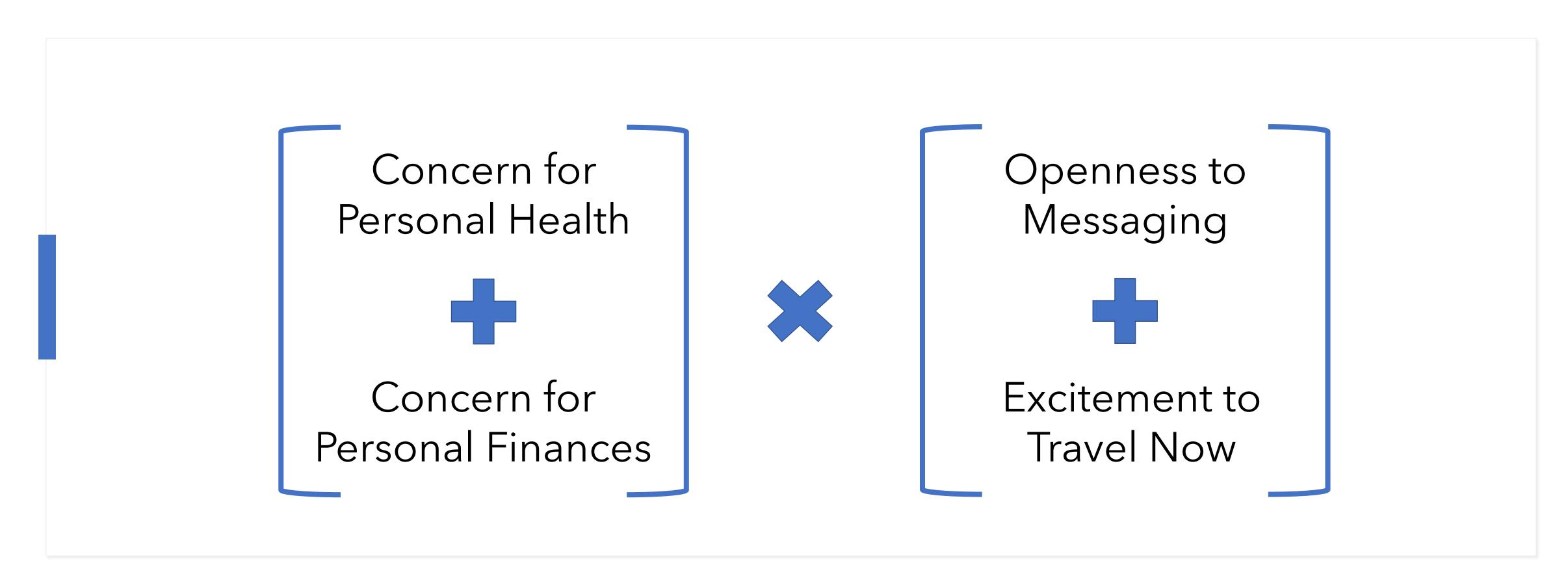


The goals are to identify:

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



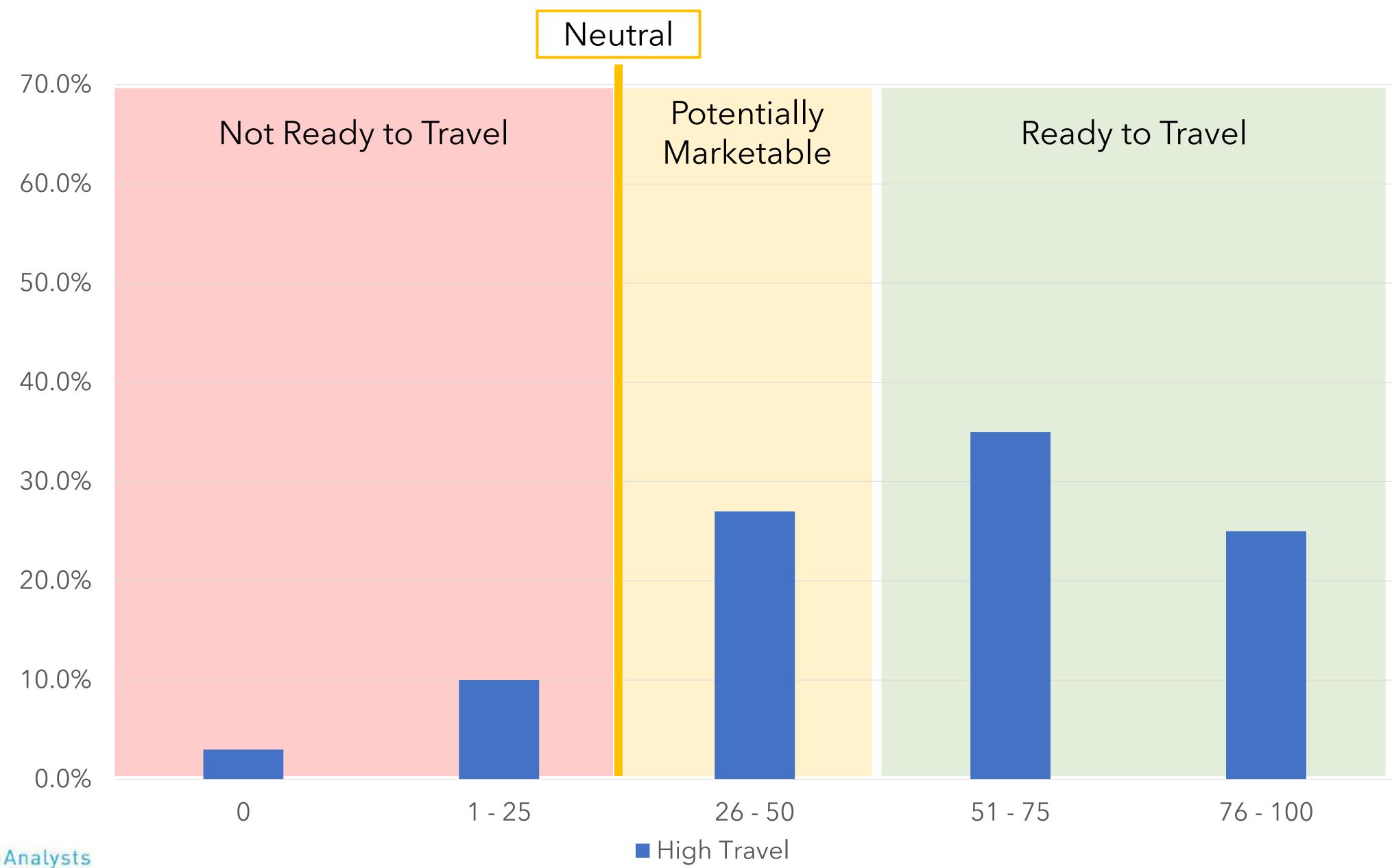
Predictive Index Formula



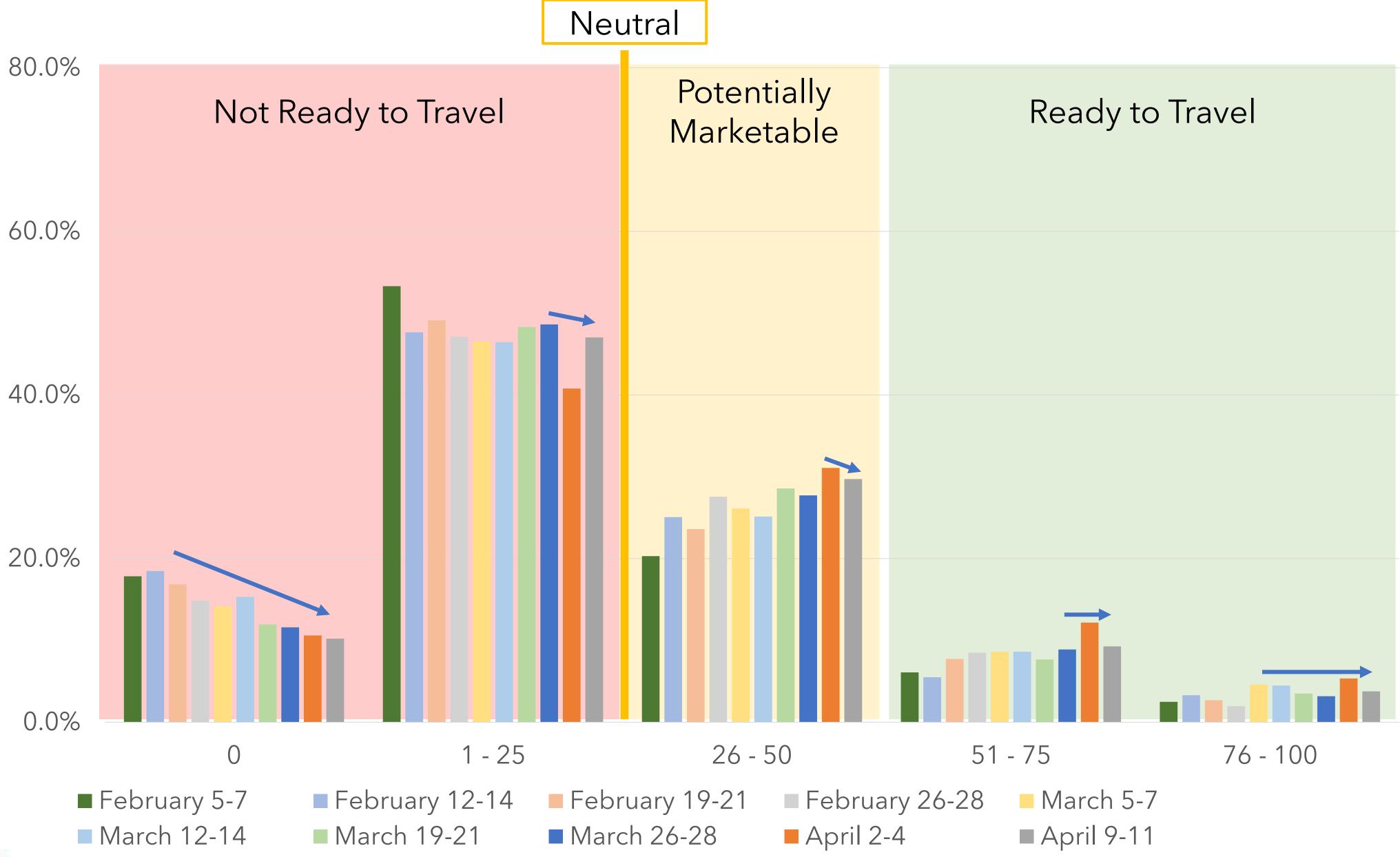
*Normalized to a 100pt scale



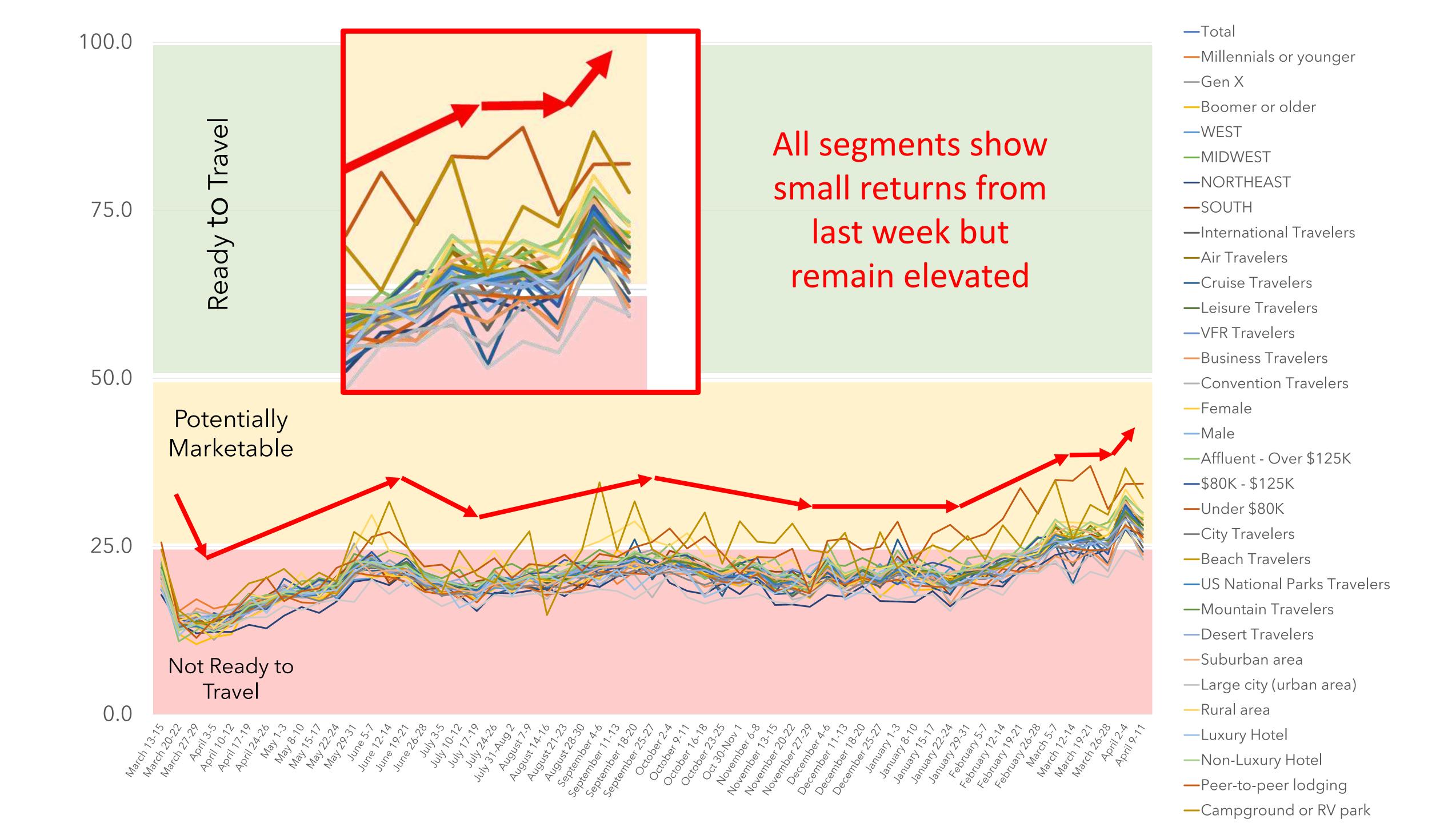
Healthy Travel Outlook

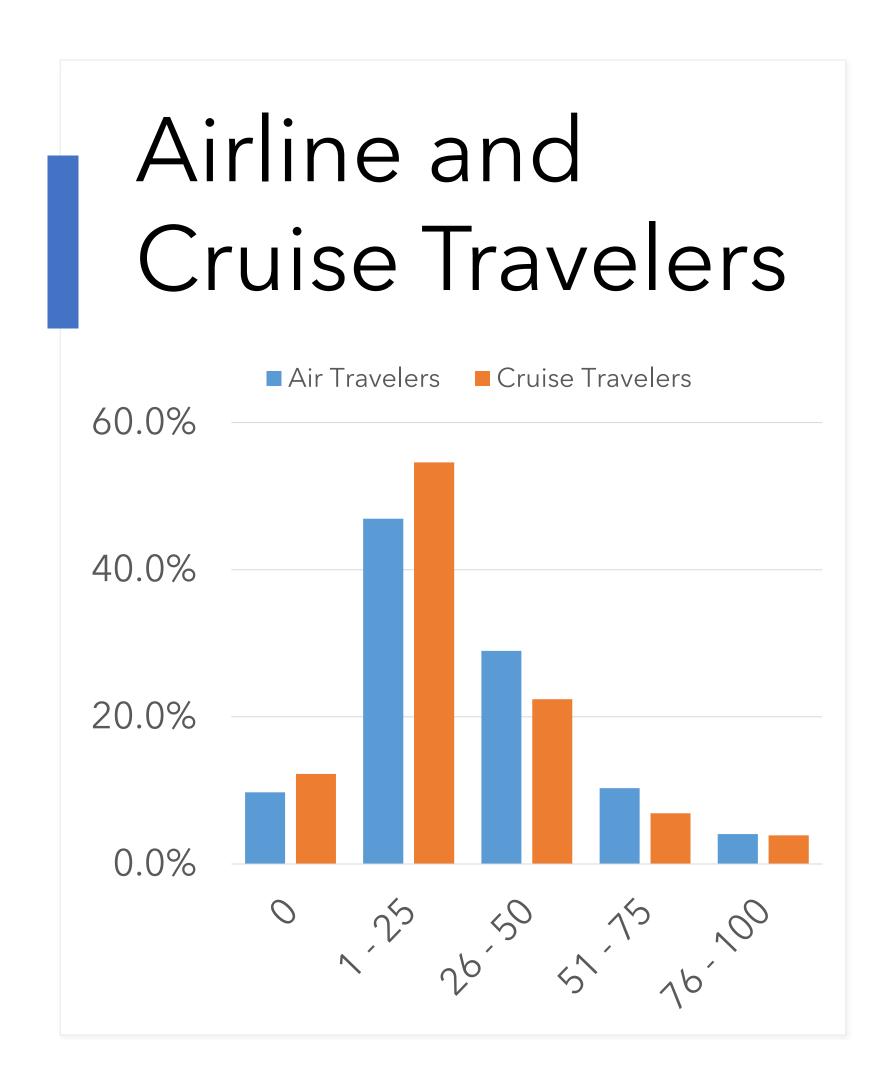


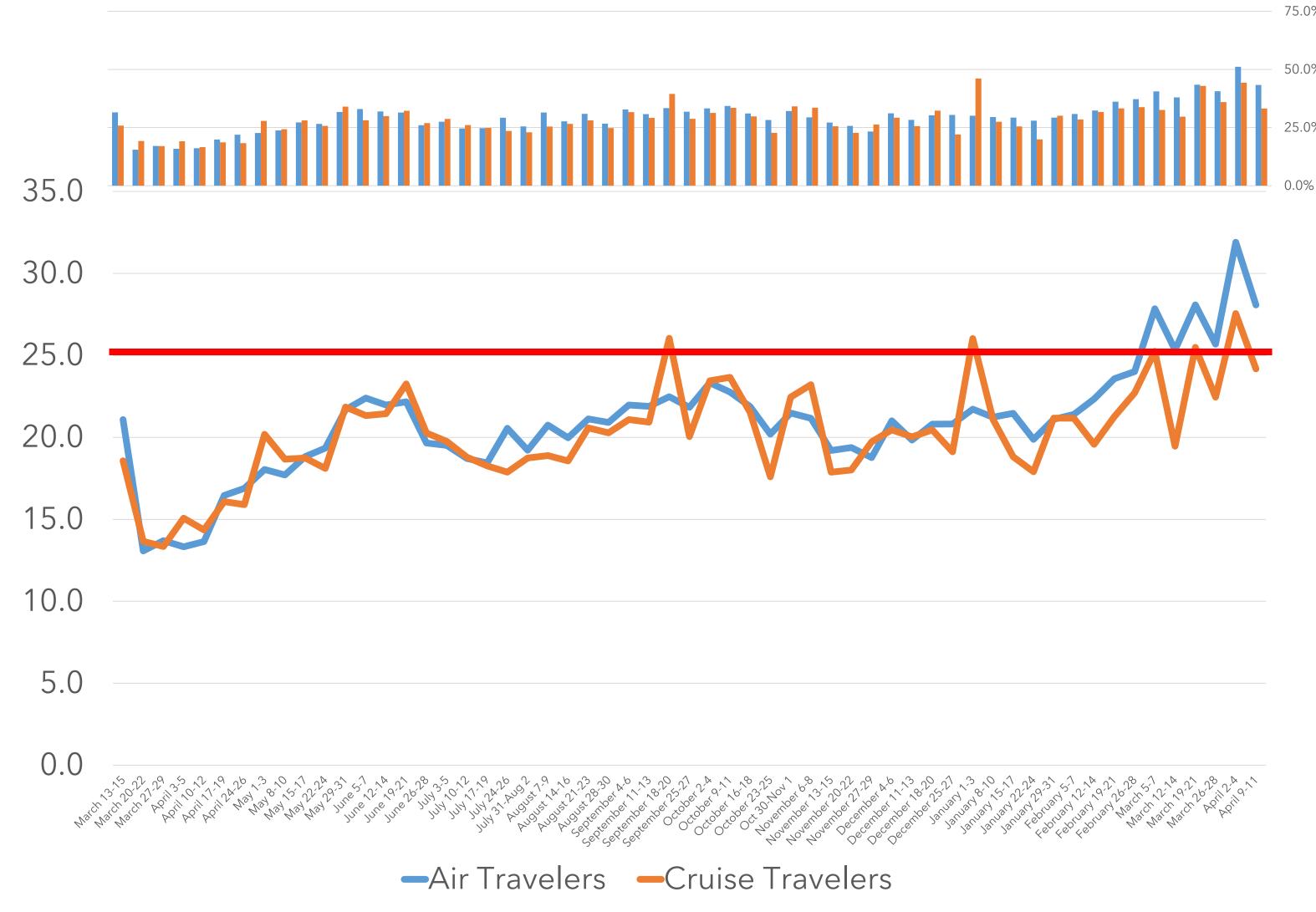
Travel Outlook



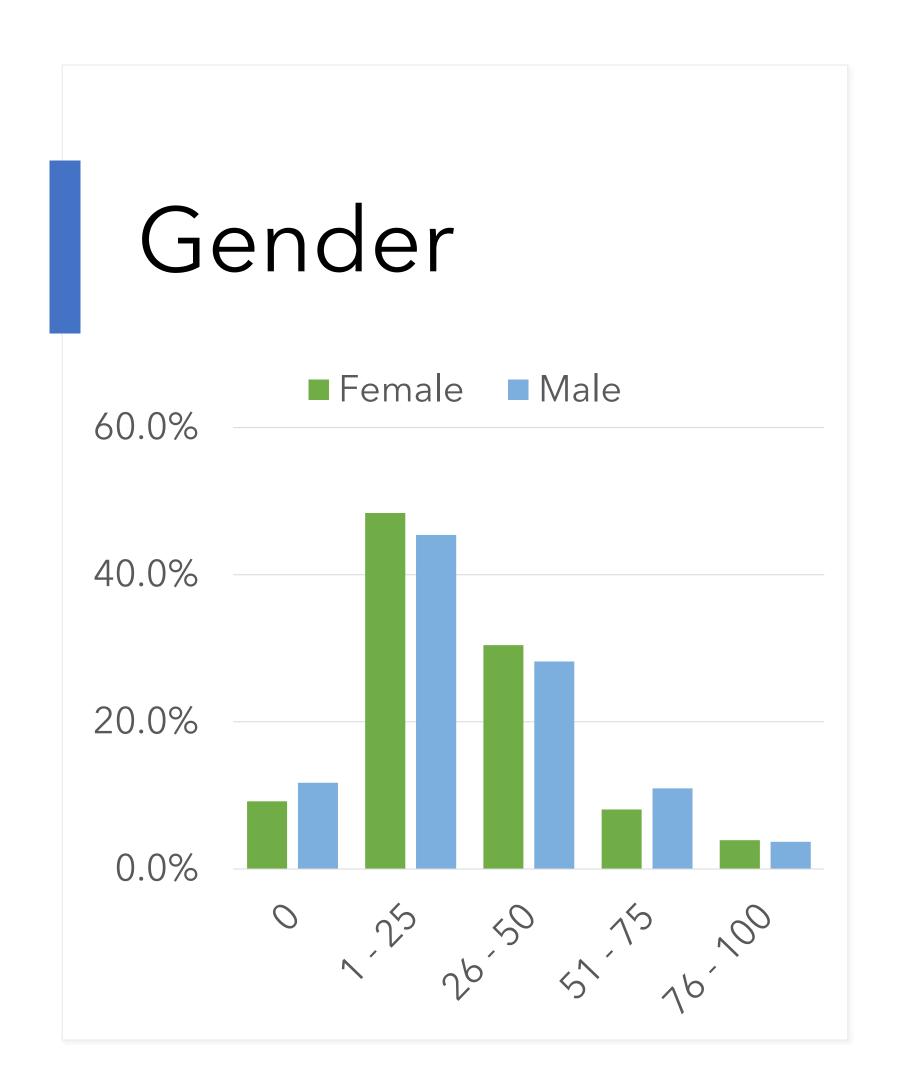


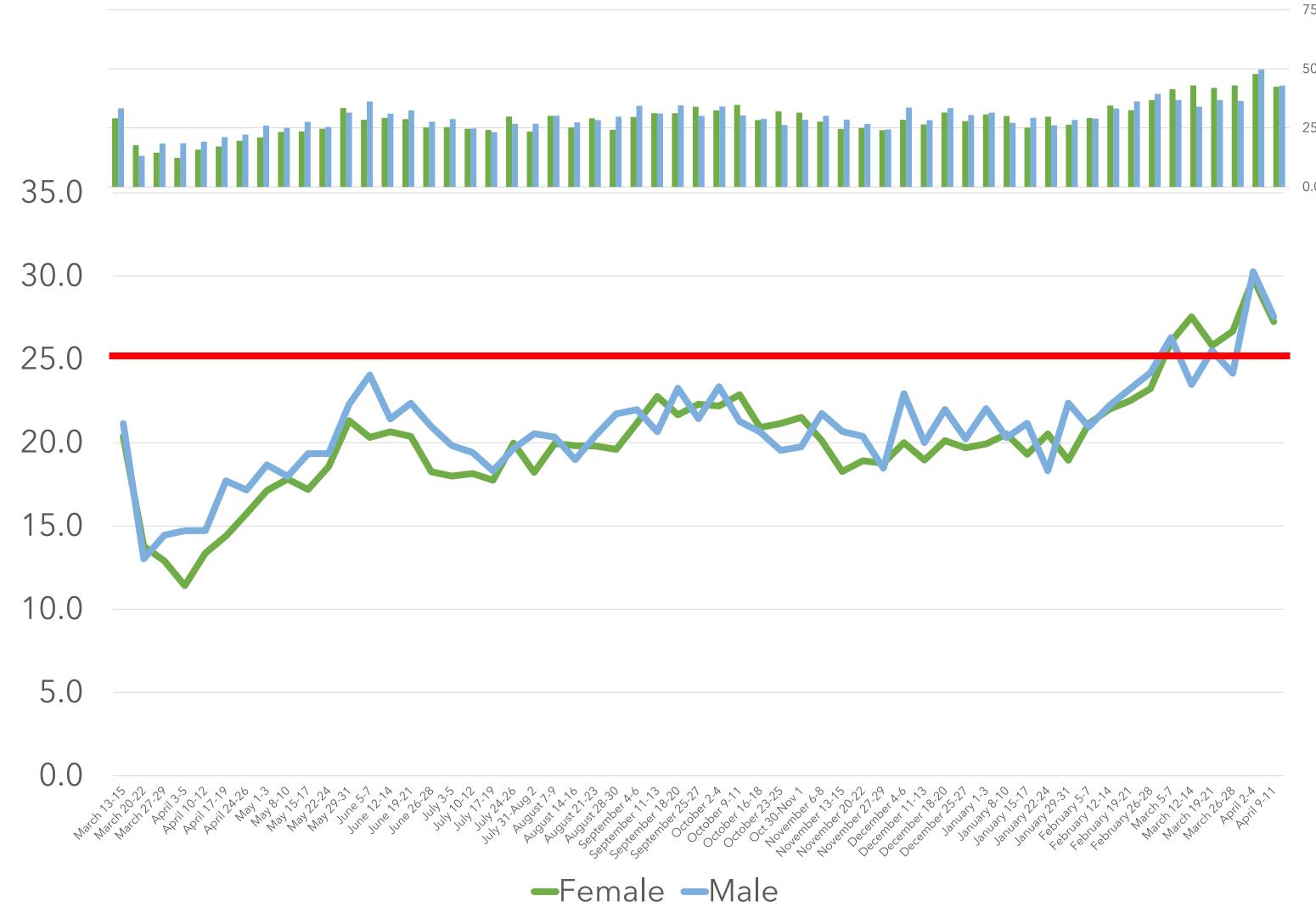




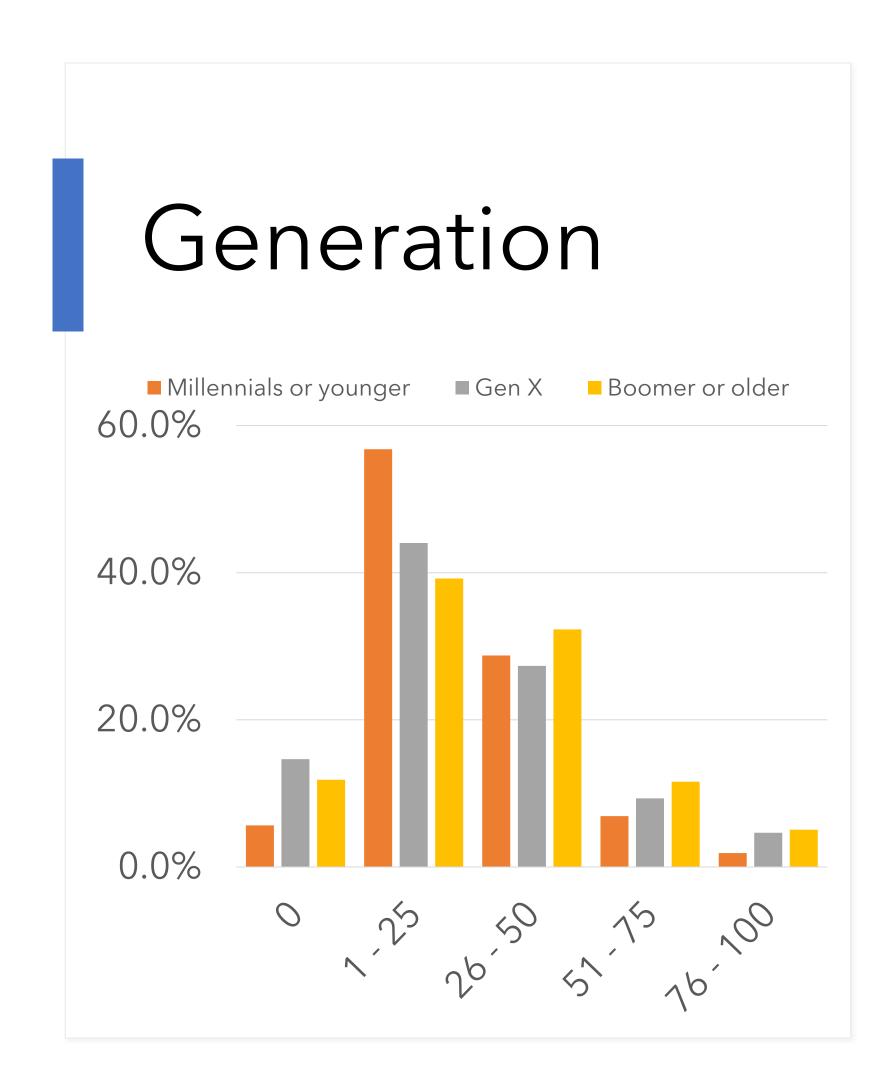


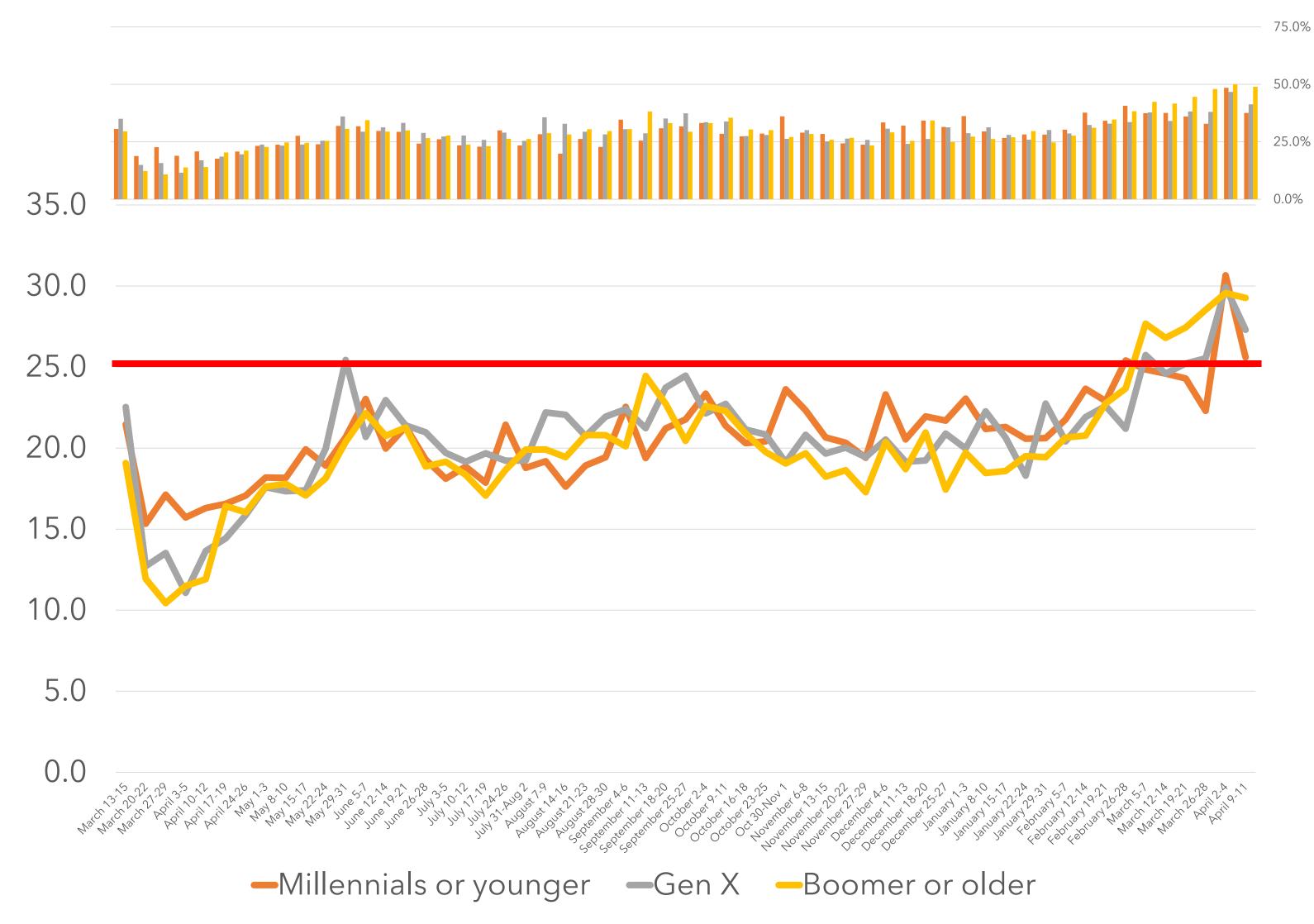




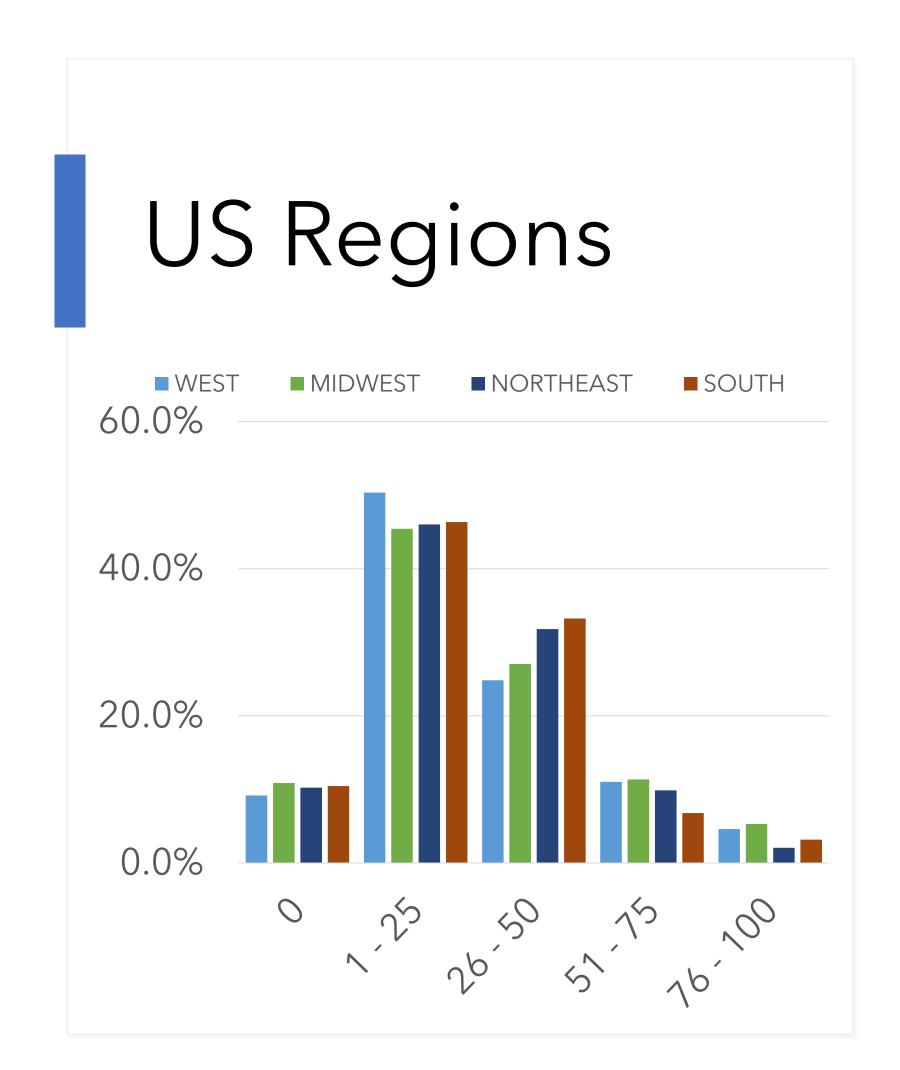


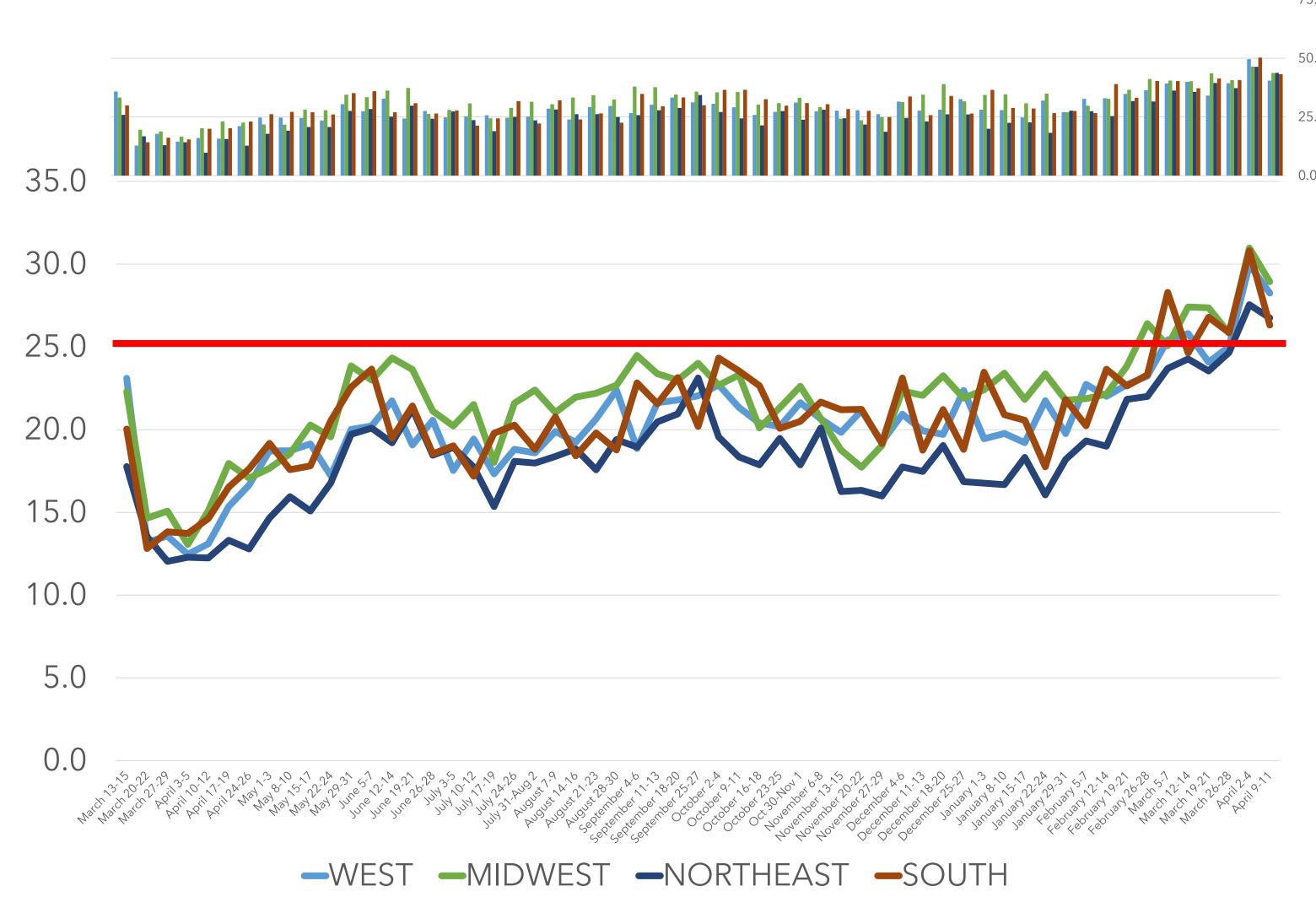




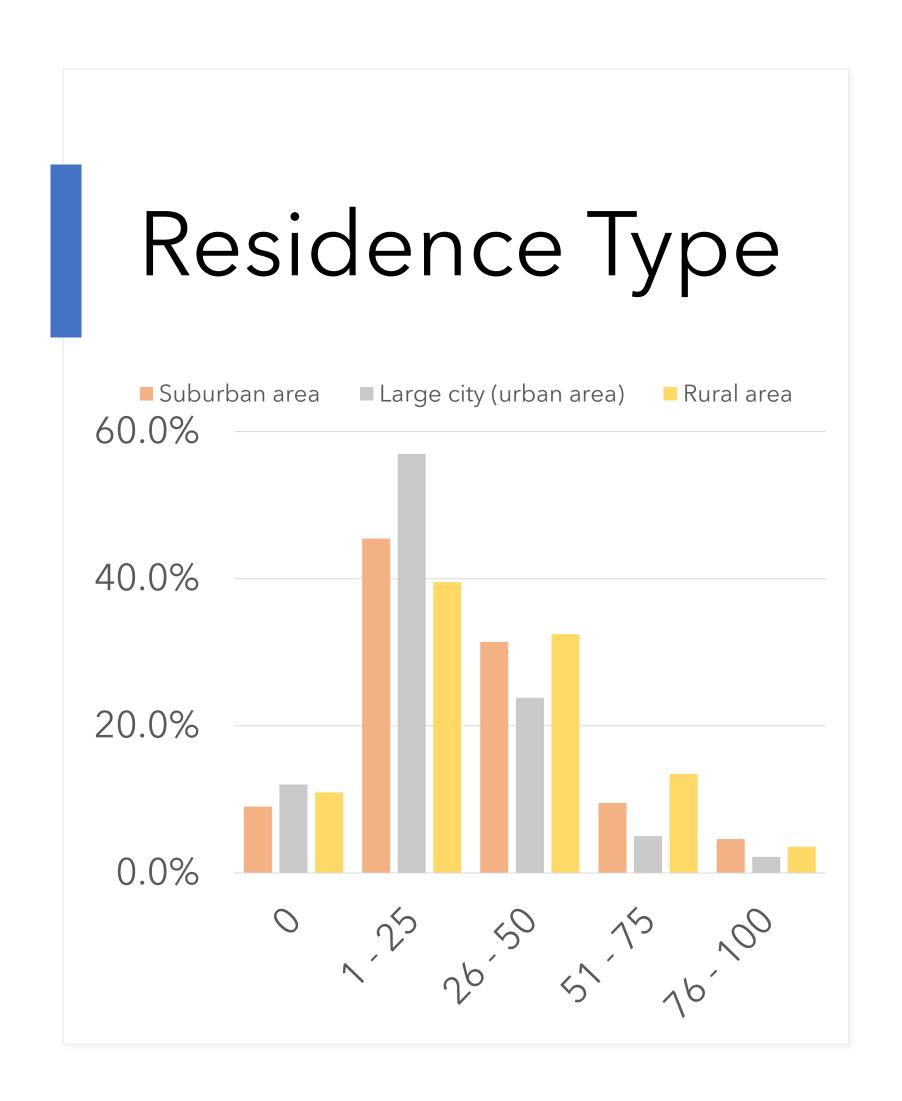


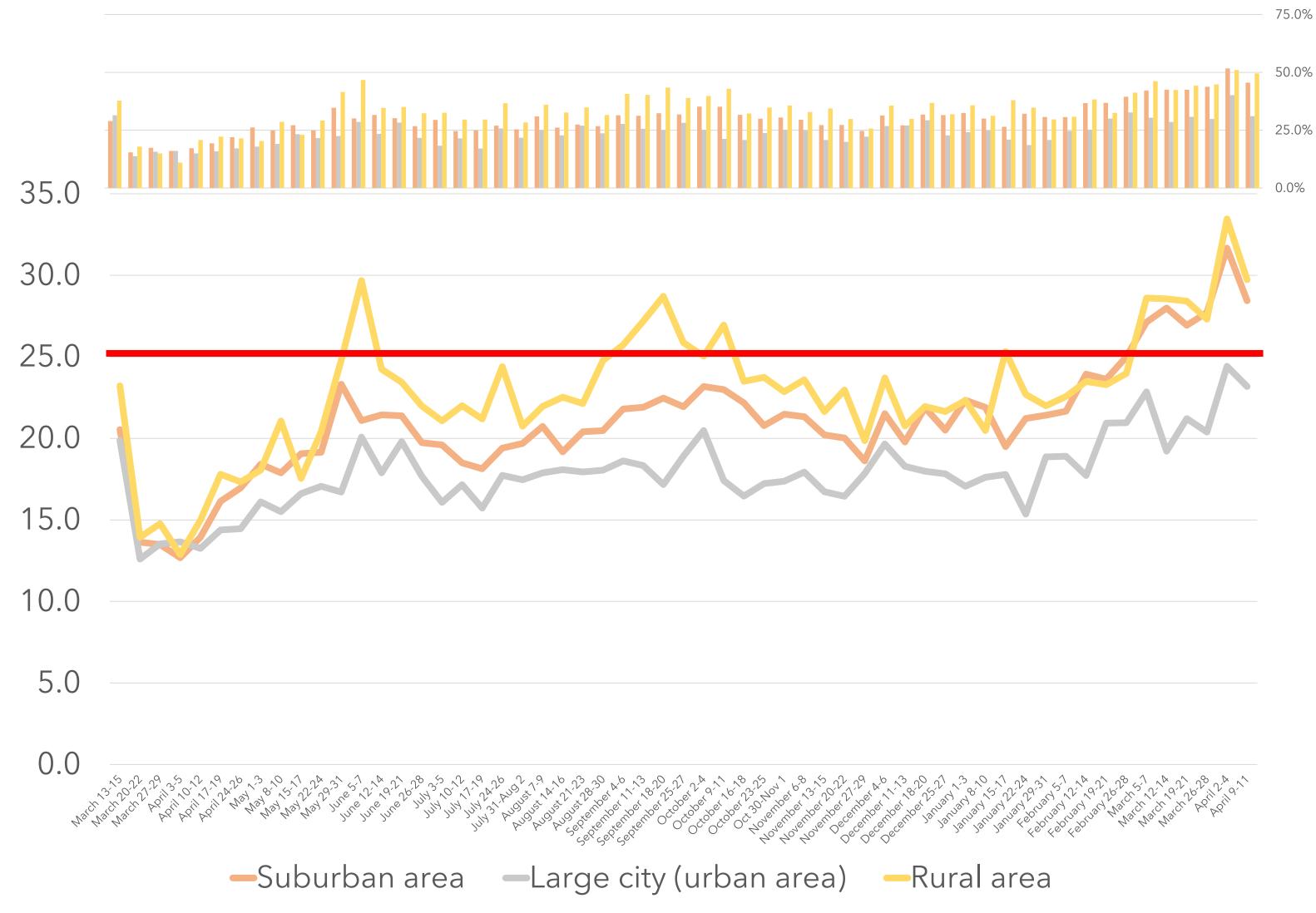




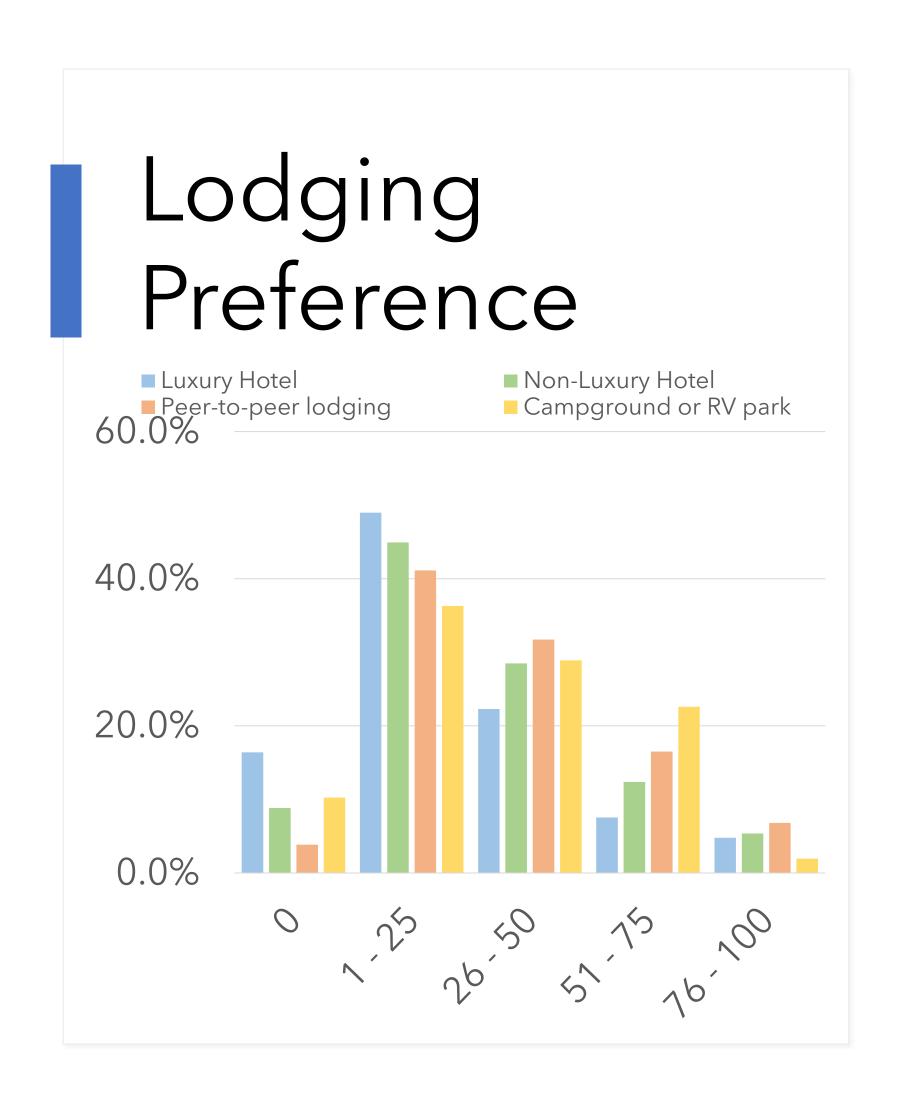


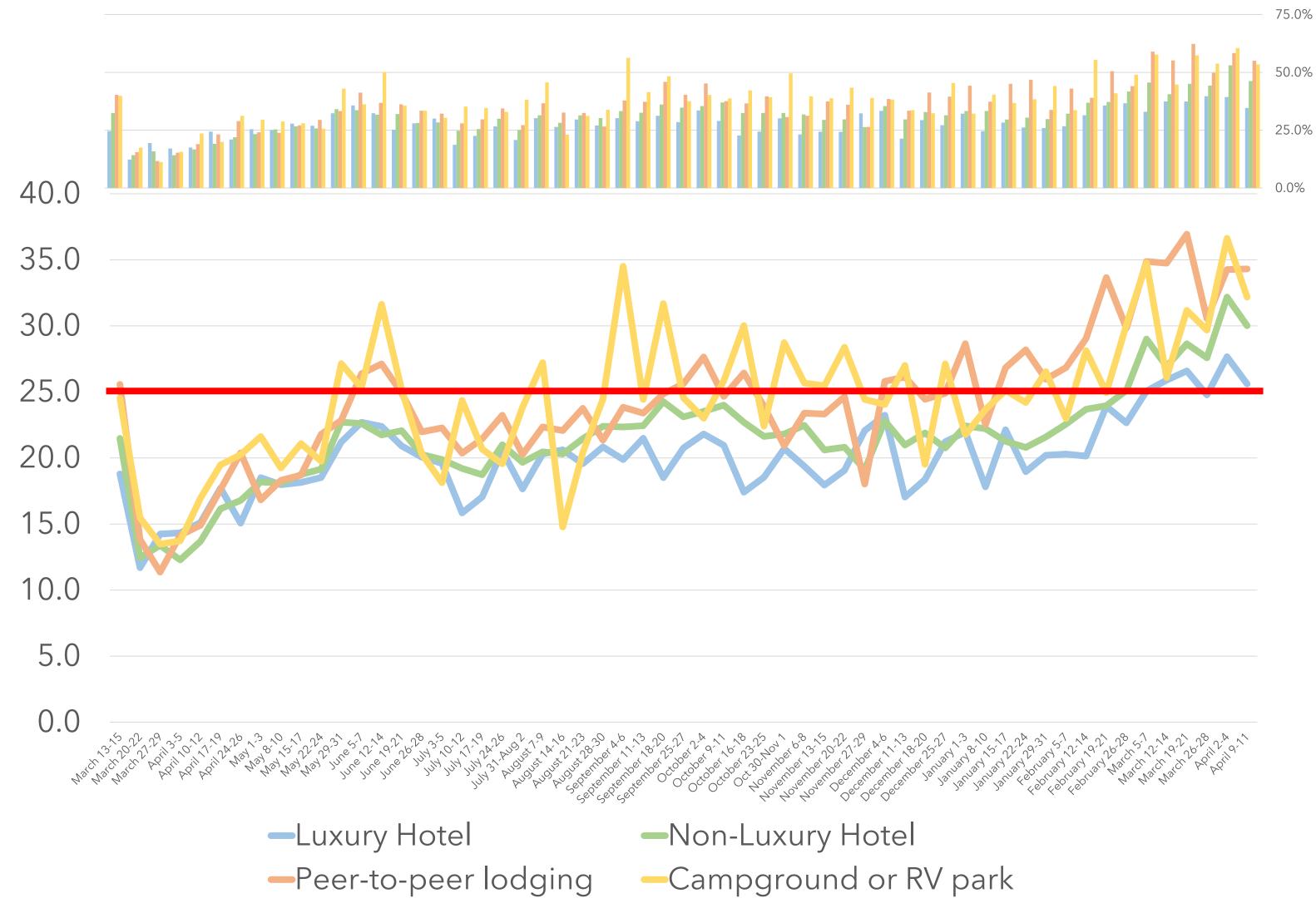
















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