CORONAWIRUS TRAWEL SENTIMENT REPORT KEY FINDINGS—WEEK OF APRIL 26TH, 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.

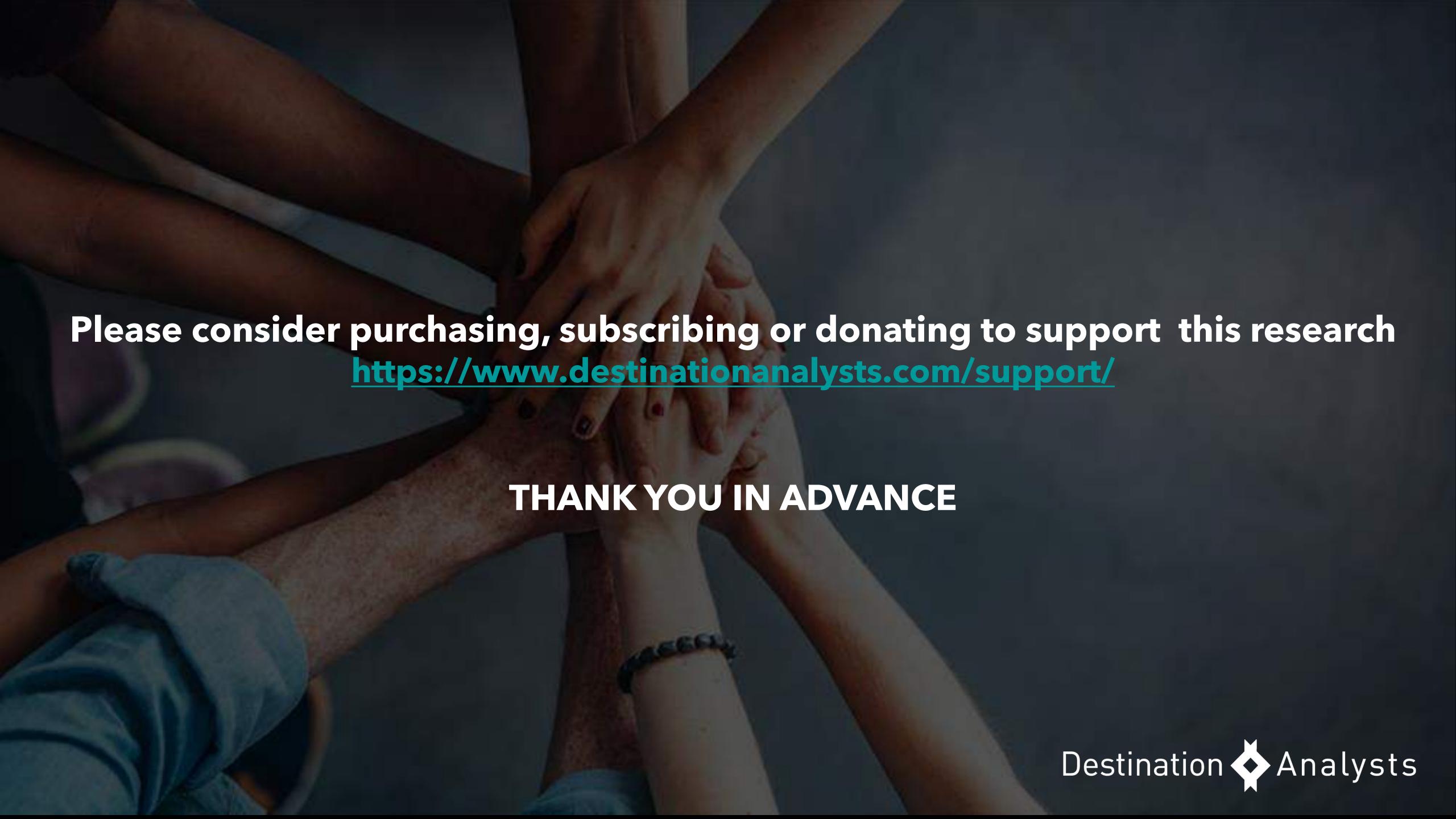
Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

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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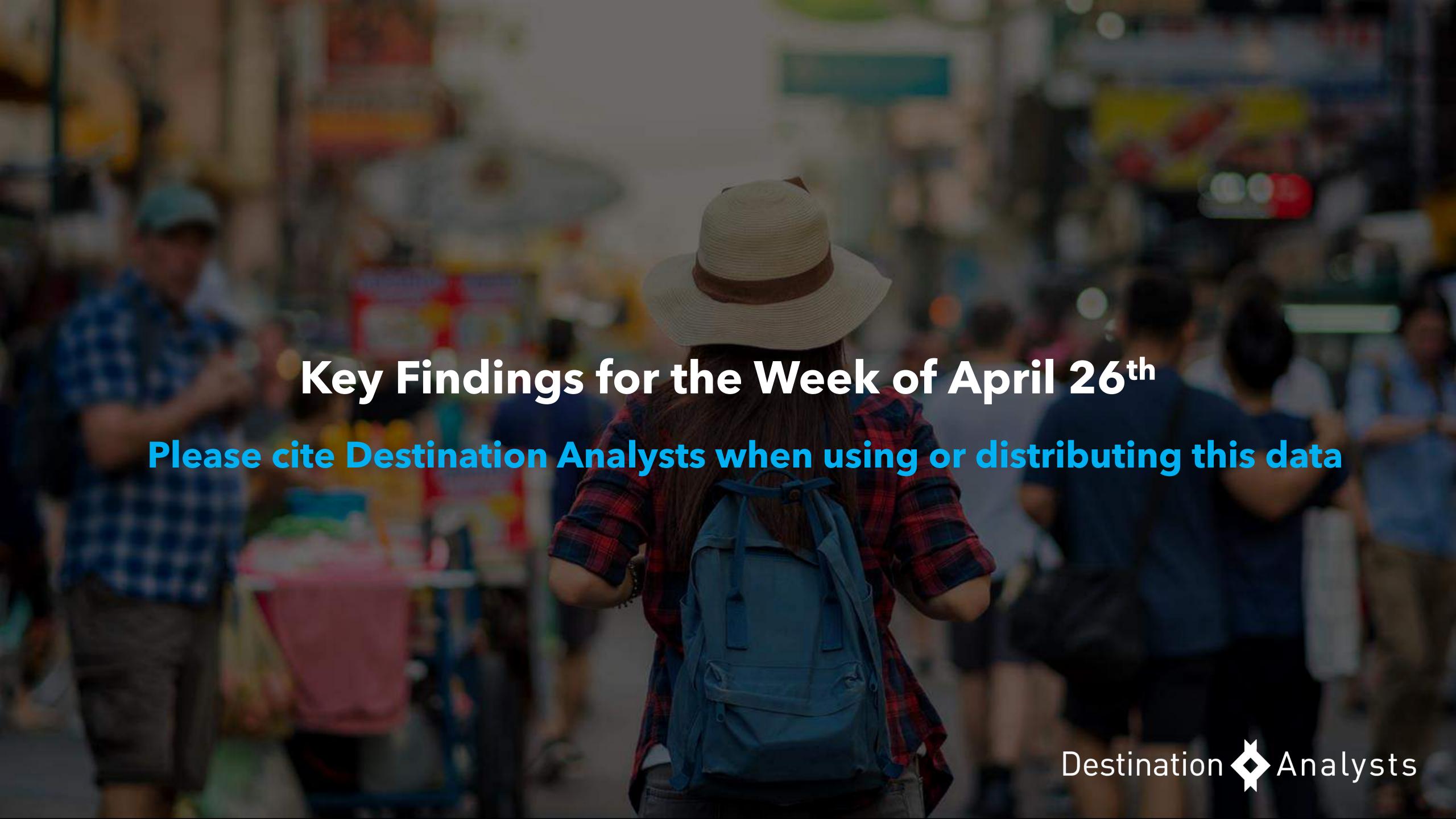
@Destination-Analysts-Inc



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 timely conversation with vaccinated travelers. Don't miss the opportunity to hear directly from them about how they're feeling about travel right now, what they have planned ahead for this summer season and the marketing and messaging that will most resonate with them.

Sign up to attend the webinar on Tuesday, April 27th at 11:00am ET here.



Perceptions of Travel Activities as Unsafe

It has been one year since the height of cumulative concerns about coronavirus and thereby travel and leisure.

With over half of American adults at least one dose into their COVID-19 vaccine as of this week (and 60% of travelers), Americans' anxiety about contracting the virus and the pandemic's financial impact are the lowest they have been.

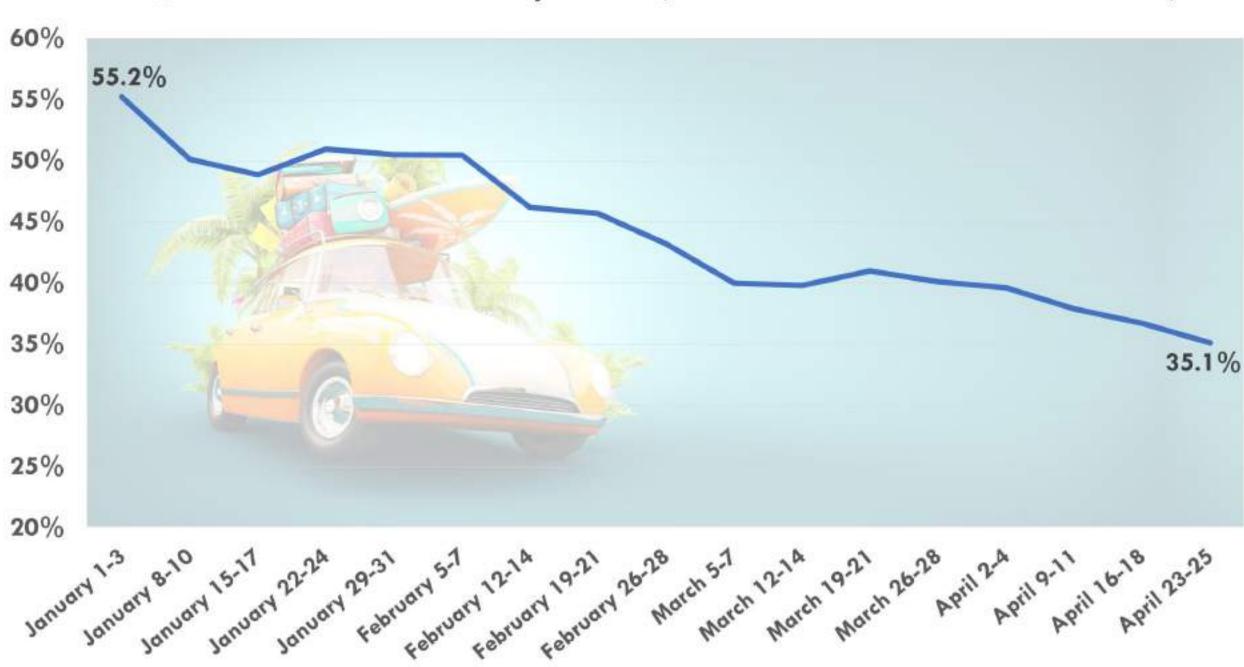
Americans' perceptions of travel activities as unsafe dropped again this week to another coronavirus-era low—now at just 35.1%, down from 57.8% in January and 69.4% one year ago.

Over 43% say they would not feel guilty traveling right now—another pandemic record.

PERCEPTIONS OF TRAVEL ACTIVITIES AS UNSAFE REACHES ANOTHER PANDEMIC RECORD LOW

JANUARY 1 - APRIL 25, 2021

% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITIES TESTED)



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

(Base: Waves 43-59 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, 1,208, 1,202, 1,206, 1,202, 1,210 and 1,215 completed surveys.)



American Travel on the Rise

American travel is indeed definitively on the rise.

Seven-in-ten Americans are in a ready-to-travel state of mind and two-thirds say they are highly open to travel inspiration. In the last week, over 75% have actively dreamt and/or planned travel, including the nearly 18% who made a booking or reservation for an upcoming trip. As of this week, nearly 88% have at least tentative leisure trip plans right now and over 71% will be taking at least one trip within the next 3 months. In fact, the typical American traveler is likely to take nearly 2 leisure trips by the time August rolls around.

(Base: Wave 59 data. All respondents, 1,215 completed surveys. Data collected April 23-25, 2021)

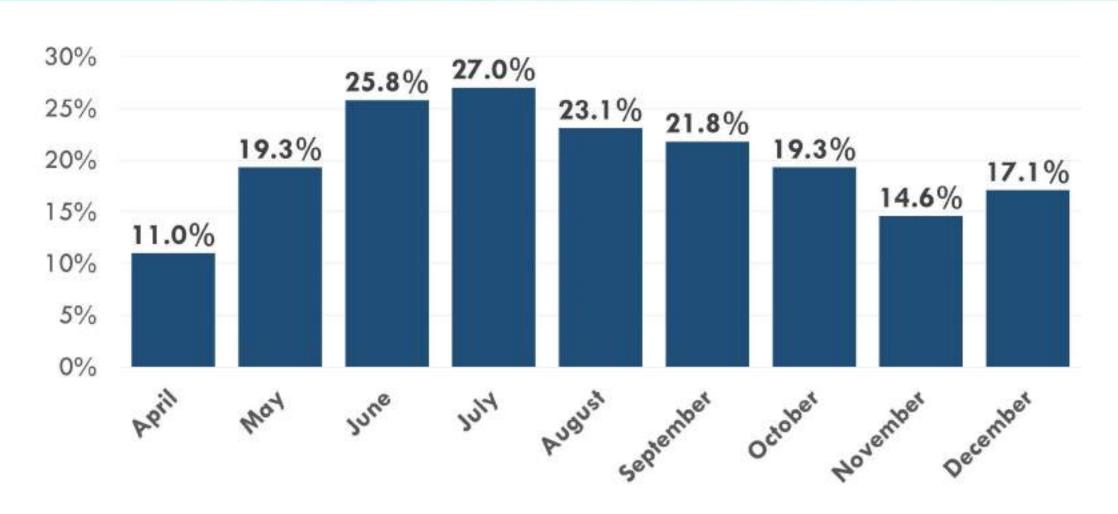
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AMERICAN TRAVEL ON THE RISE

AS OF APRIL 25, 2021



MONTHS AMERICANS HAVE TRIP PLANS IN 2021 (% OF AMERICAN TRAVELERS WITH PLANS IN EACH MONTH)



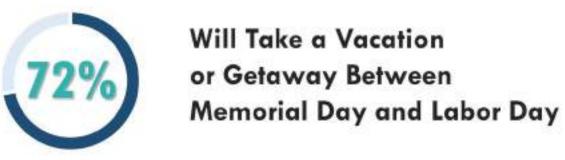
Summer 2021: The Travel Outlook

With April coming to a close, Summer 2021 draws even nearer.

Last month we were able to report that many American travelers are saying "YES" to summer vacation, and the number has grown even further in the four weeks since. Now 71.6% say they will take a vacation or getaway between Memorial Day and Labor Day, up nearly 10 percentage points from last month and up nearly 36 percentage points from 2020. Across all American travelers, the average number of leisure trips being taken this Summer is 1.7. July remains the peak month, with over half of American travelers planning to take one or more trips in that month. Only 36.4% say their very first Summer trip is well-developed already; about 44% have not yet made any major trip reservations yet for their Summer travel yet.

SUMMER 2021: THE TRAVEL OUTLOOK

AS OF APRIL 25, 2021





22% Will Travel 19% Will Travel for a Convention/ **Group Meeting**

for Business



34% Will Travel by Airplane





Say this is MORE



Say this is the SAME



Say this is LESS



Summer 2021: The Travel Outlook (continued)

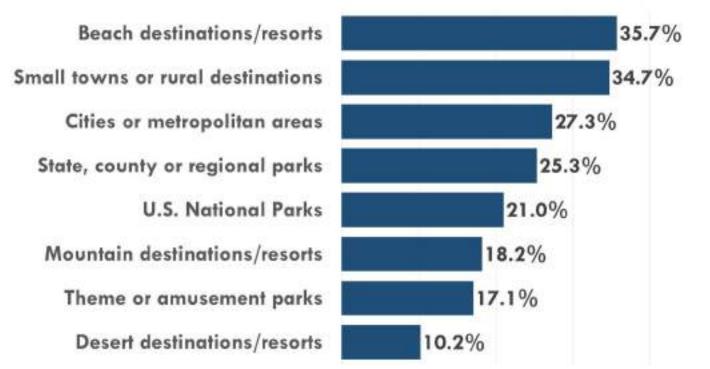
Over 70% of Summer travelers plan to head out of state (and one-in-ten will travel abroad) so, while car is still the predominant transportation method, 34.2% will be getting on an airplane.

Beaches, of course, remain the top destination and planned activity, although 27.3% say they will be visiting cities. Restaurants and retail stores look to be attracting tourists this Summer, as well. Interestingly, Americans are split in their expectations for travel prices this season. While 36.3% agree prices will be low this Summer, 30.6% disagree. Nevertheless, two-thirds of Summer travelers will actively look for discounts and 58.8% say such deals are important to their travel planning.

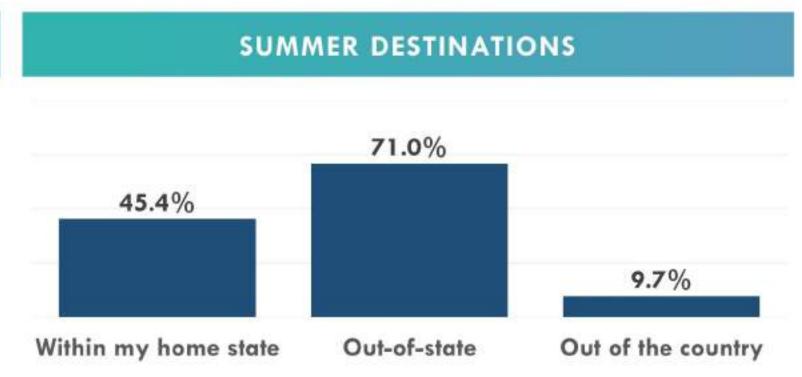
SUMMER 2021: THE TRAVEL OUTLOOK

AS OF APRIL 25, 2021











Impediments to Summer Travel

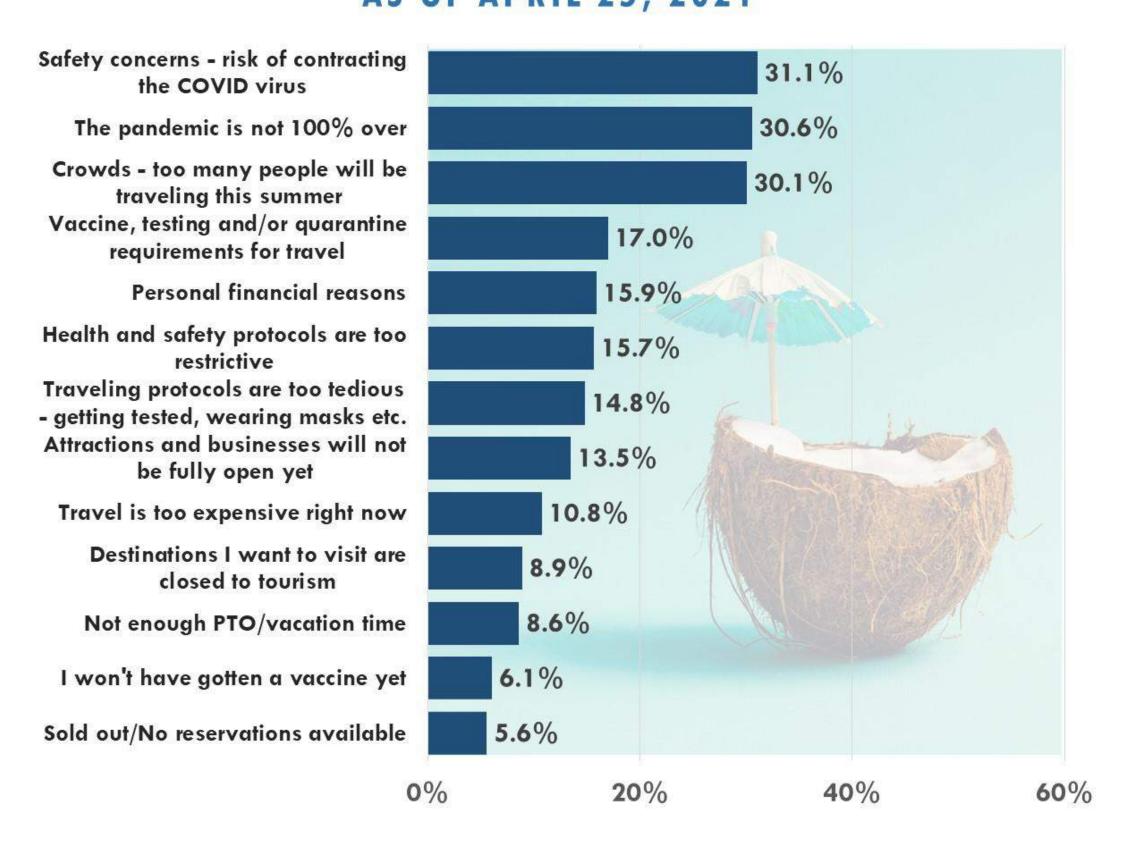
Still, the pandemic lingers in Americans' mindset.

While 43.6% say the number of summer trips they are taking this year is what they would do normally—and over a quarter say it's even more—nearly one-third of American travelers say their summer trip volume is less than a typical non/pre-pandemic year for them. 43.7% even plan to staycation.

When asked for reasons as to why they are not planning more travel this summer, the top 2 cited were directly pandemic-related—safety concerns about contracting COVID-19 and that the pandemic is not 100% over. The amount of people traveling this Summer is also deterring some, as are COVID-related restrictions, protocols and limited openings.

IMPEDIMENTS TO SUMMER TRAVEL

COVID-19 STILL DOMINATES
AS OF APRIL 25, 2021



Question: Which of the following describe your reasons for not taking more leisure trips this summer? (select all that apply)



Travel Desires

And yet, the pandemic is also in retreat in Americans' psyche.

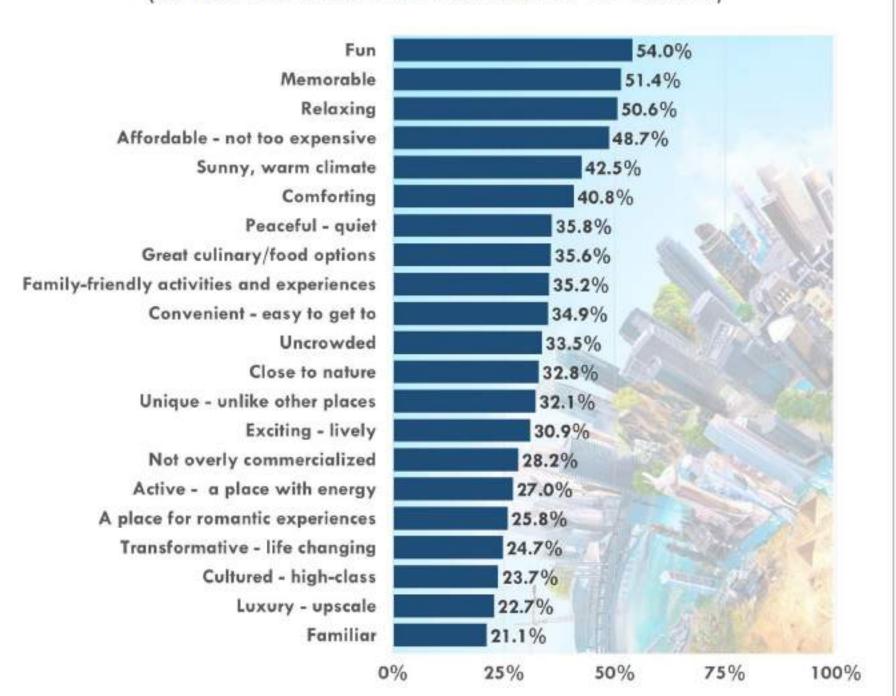
When asked the important attributes in destinations they will choose to visit this year, the percent saying "uncrowded" has fallen 20 percentage points since June 2020 (now at 33.5%). Also in decline is the percent saying they want a place that isn't overly commercialized. Instead, Americans are focused on finding places that are fun, memorable, relaxing, affordable, warm and comforting. Indeed, over these next 3 months, Americans are as likely to visit cities on their trips as small towns and beaches. When asked what they most want out of travel this year, Americans are largely looking to escape and relax, experience beautiful places, do new things and visit places they have been dreaming of.

TRAVEL DESIRES

AS OF APRIL 25, 2021

DESTINATION ATTRIBUTES SOUGHT

(% VERY IMPORTANT OR ESSENTIALLY IMPORTANT)

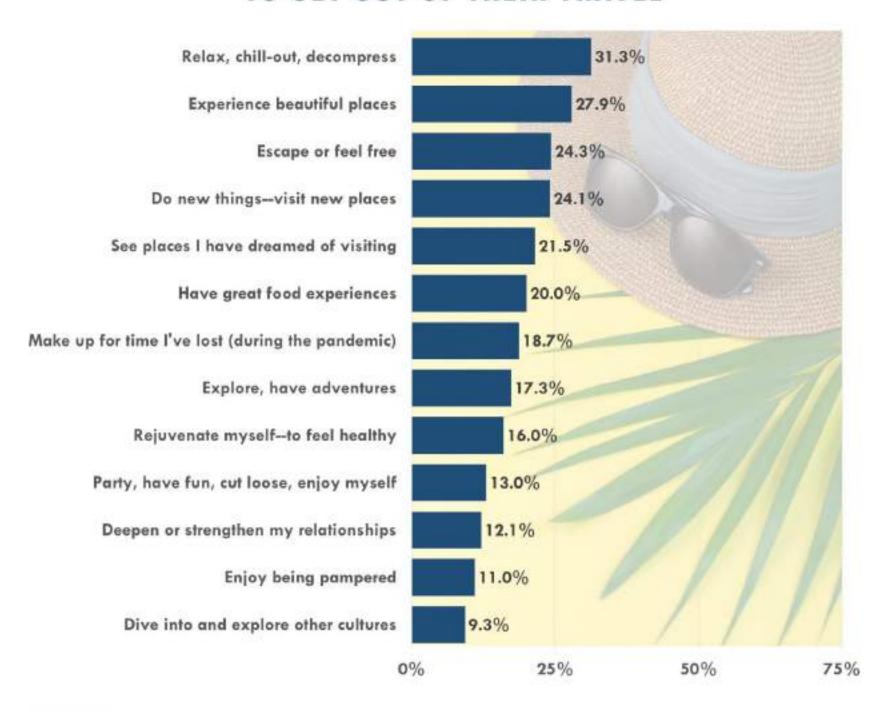


QUESTION: THINK ABOUT YOURSELF AS A TRAVELER THIS COMING YEAR. WHAT DO YOU MOST WANT TO GET OUT OF YOUR TRAVELS? (SELECT AS MANY AS 3 THAT COMPLETE THE SENTENCE)

THIS YEAR I MOST WANT TO _____ WHILE TRAVELING.

(Base: Wave 59 data. All respondents, 1,215 completed surveys. Data collected April 23-25, 2021)

WHAT AMERICANS MOST WANT TO GET OUT OF THEIR TRAVEL



QUESTION: THINK ABOUT THE TYPES OF DESTINATIONS YOU WOULD MOST LIKE TO VISIT IN THE NEXT TWELVE (12) MONTHS. PLEASE TELL US HOW YOU WANT THE PLACES YOU VISIT TO BE. HOW IMPORTANT IS EACH ATTRIBUTE?



Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing

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Highlights from the Week of April 26th



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.

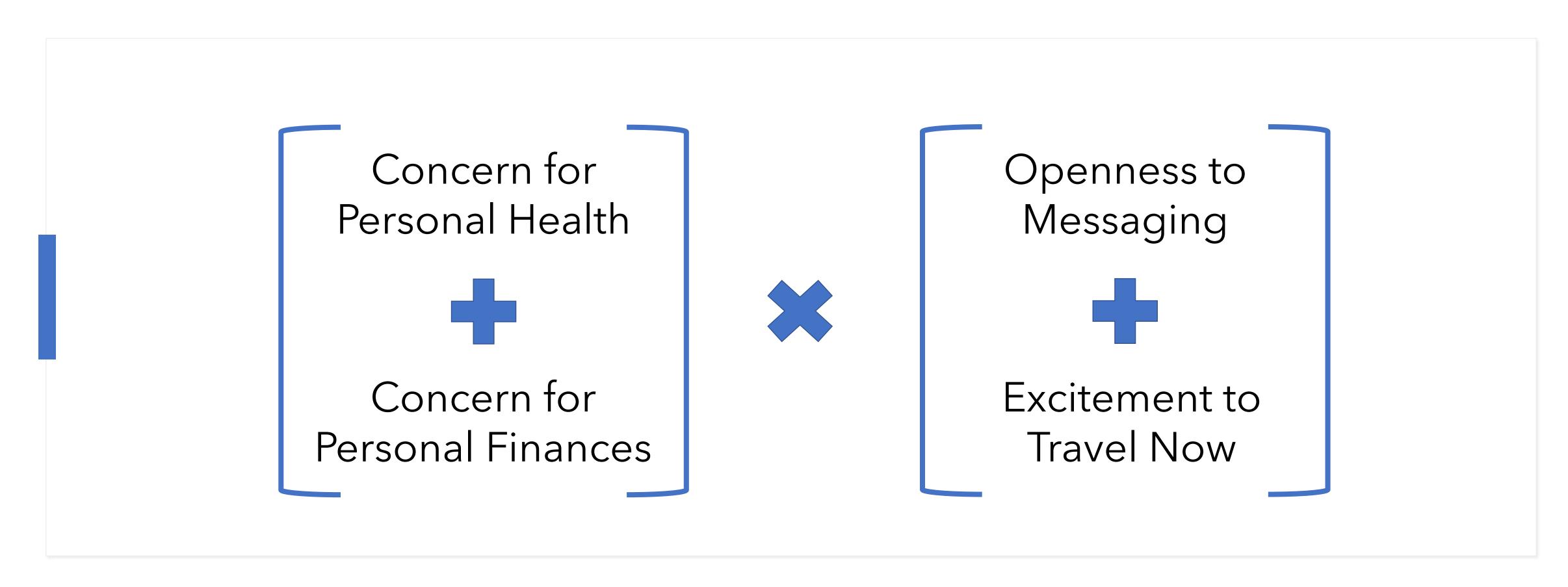


The goals are to identify:

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



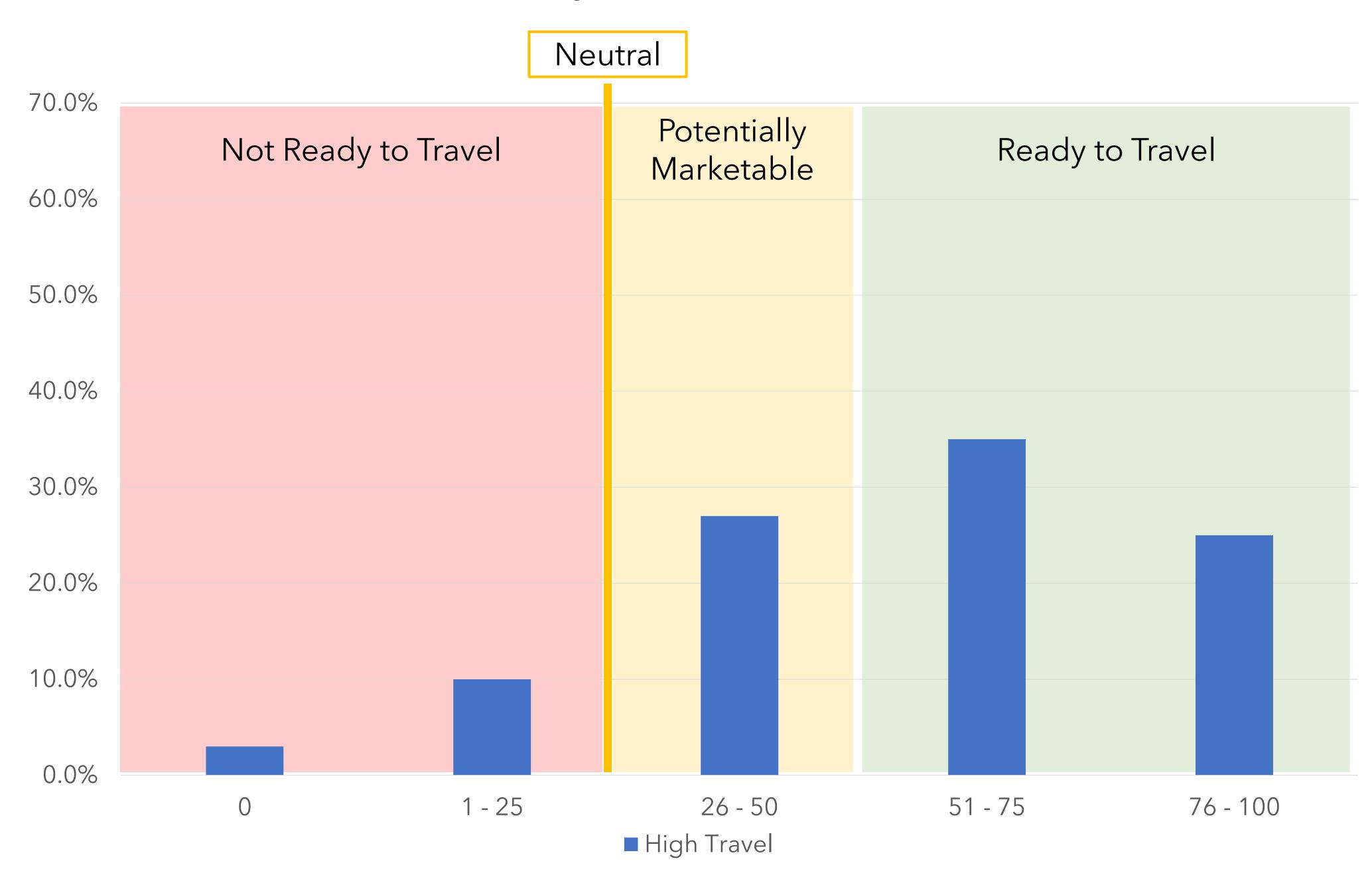
Predictive Index Formula



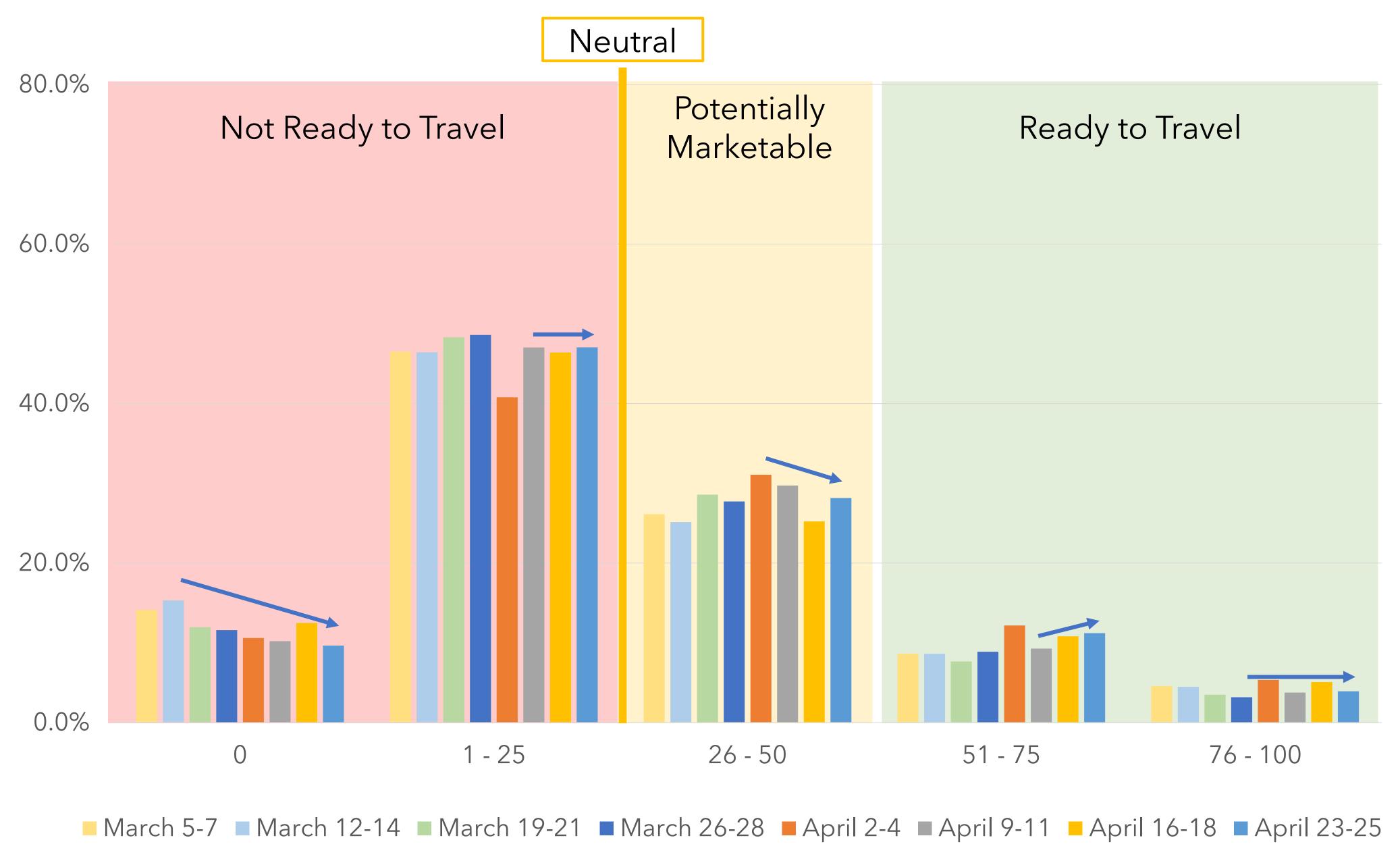
*Normalized to a 100pt scale

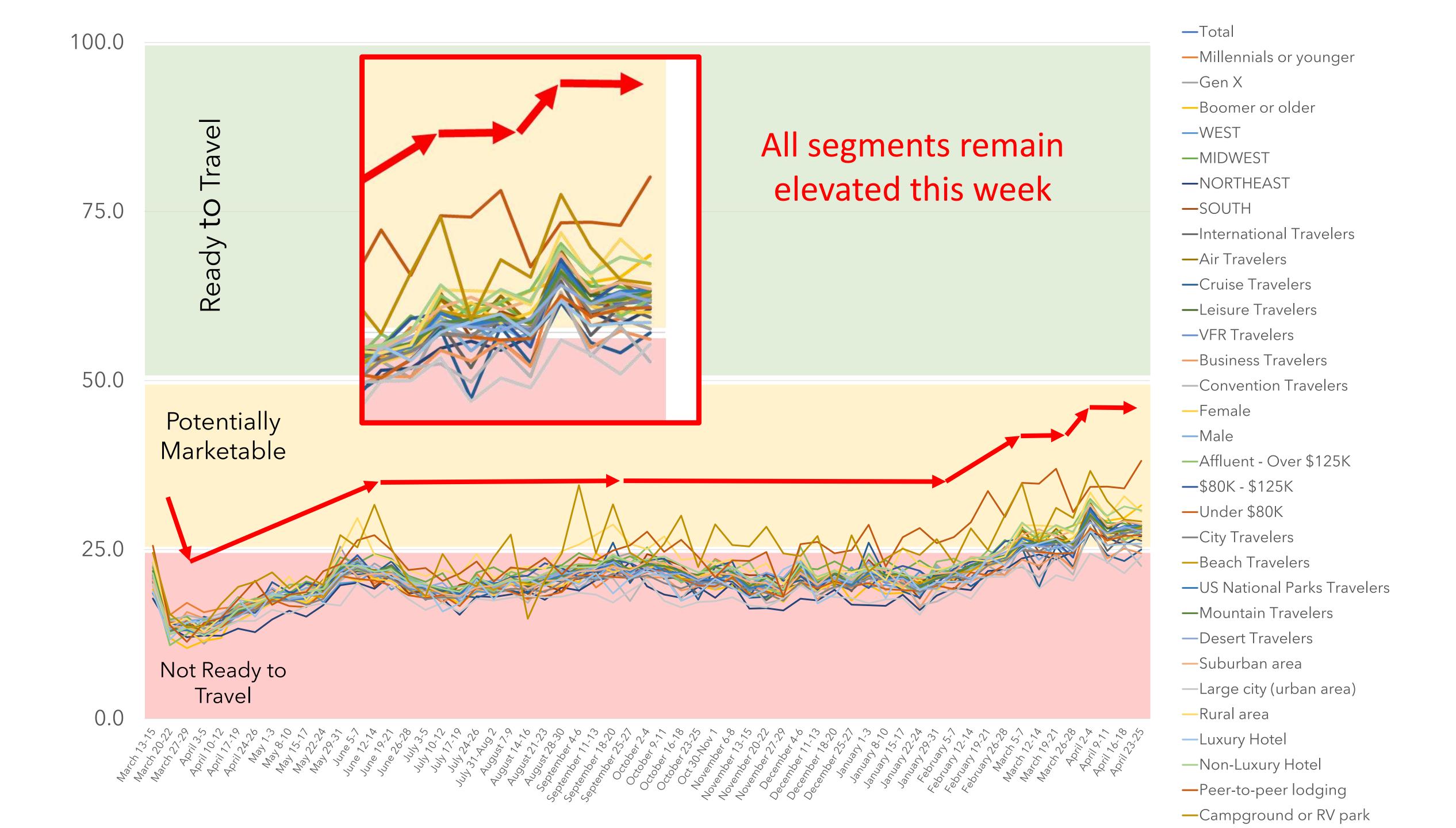


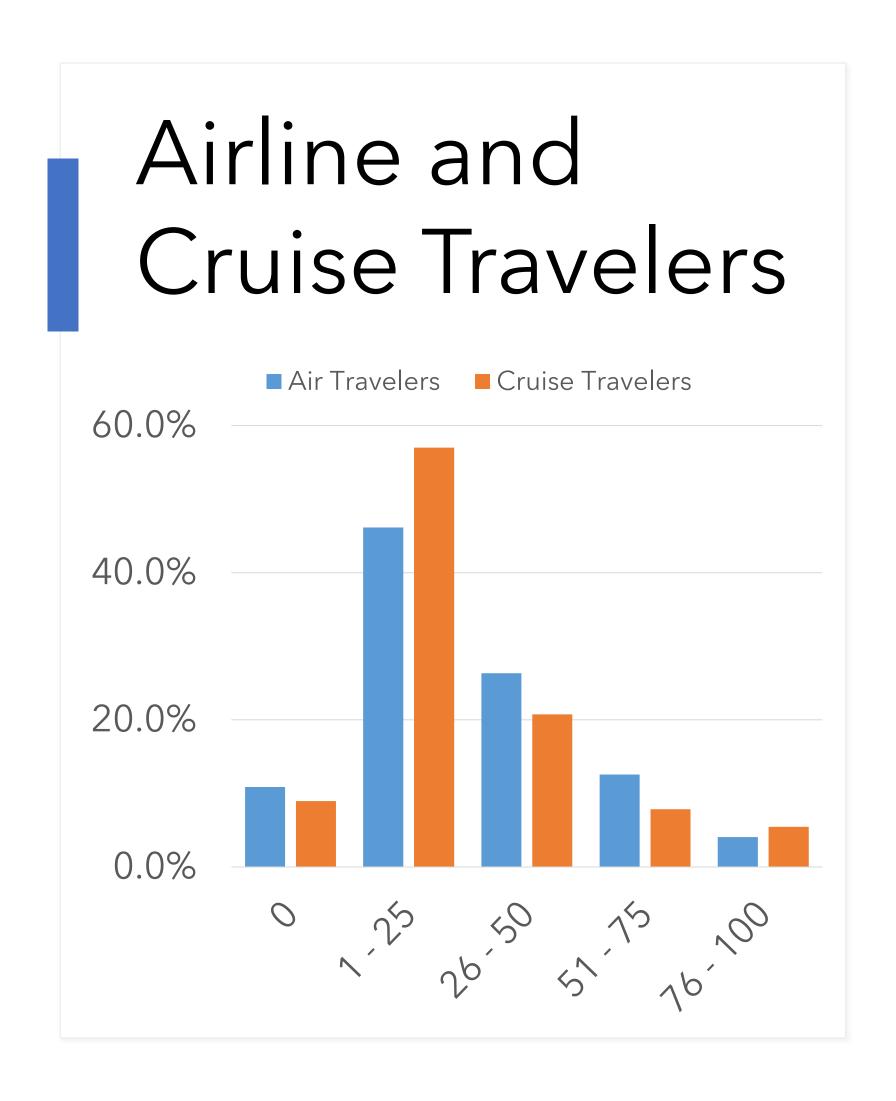
Healthy Travel Outlook

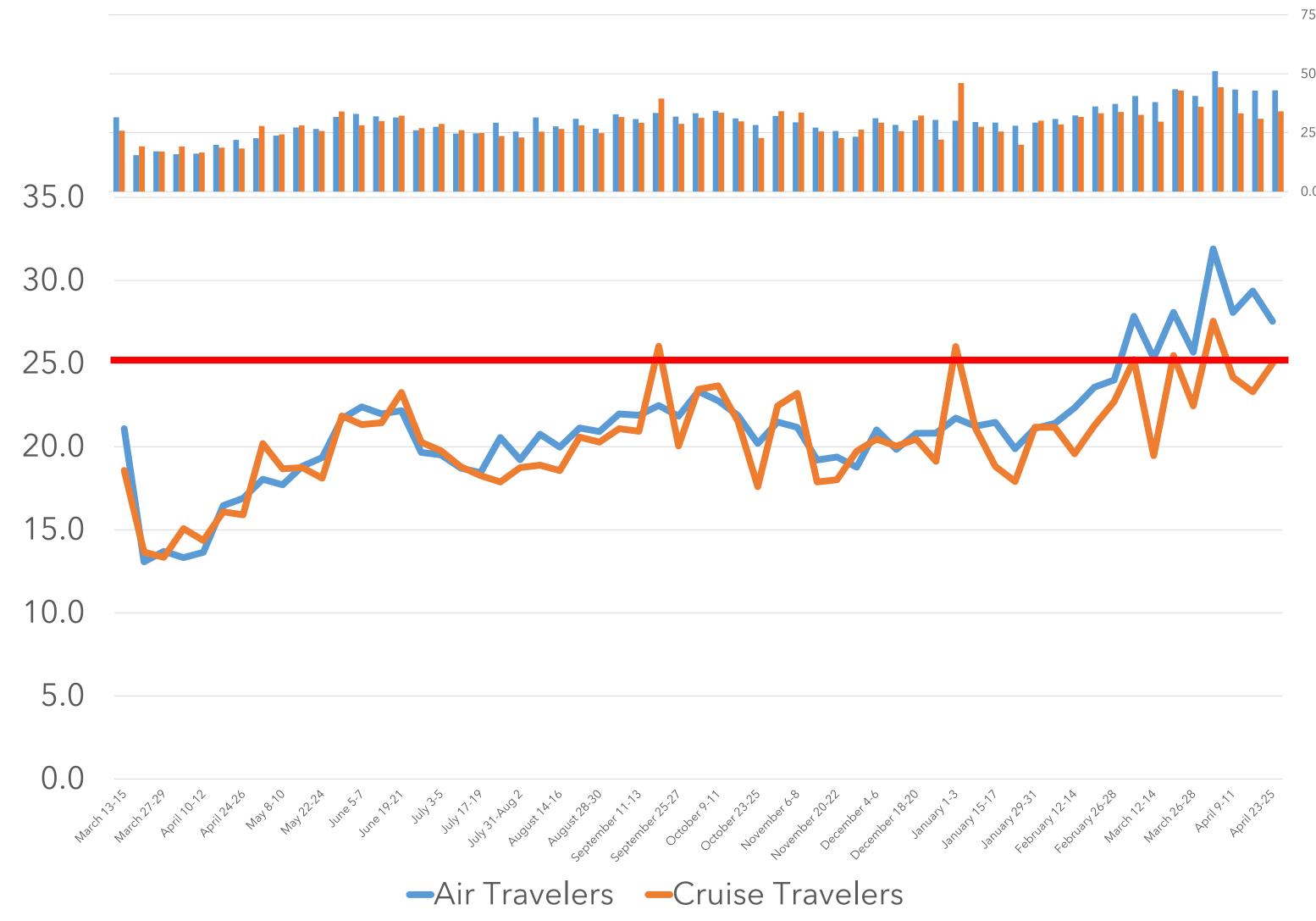


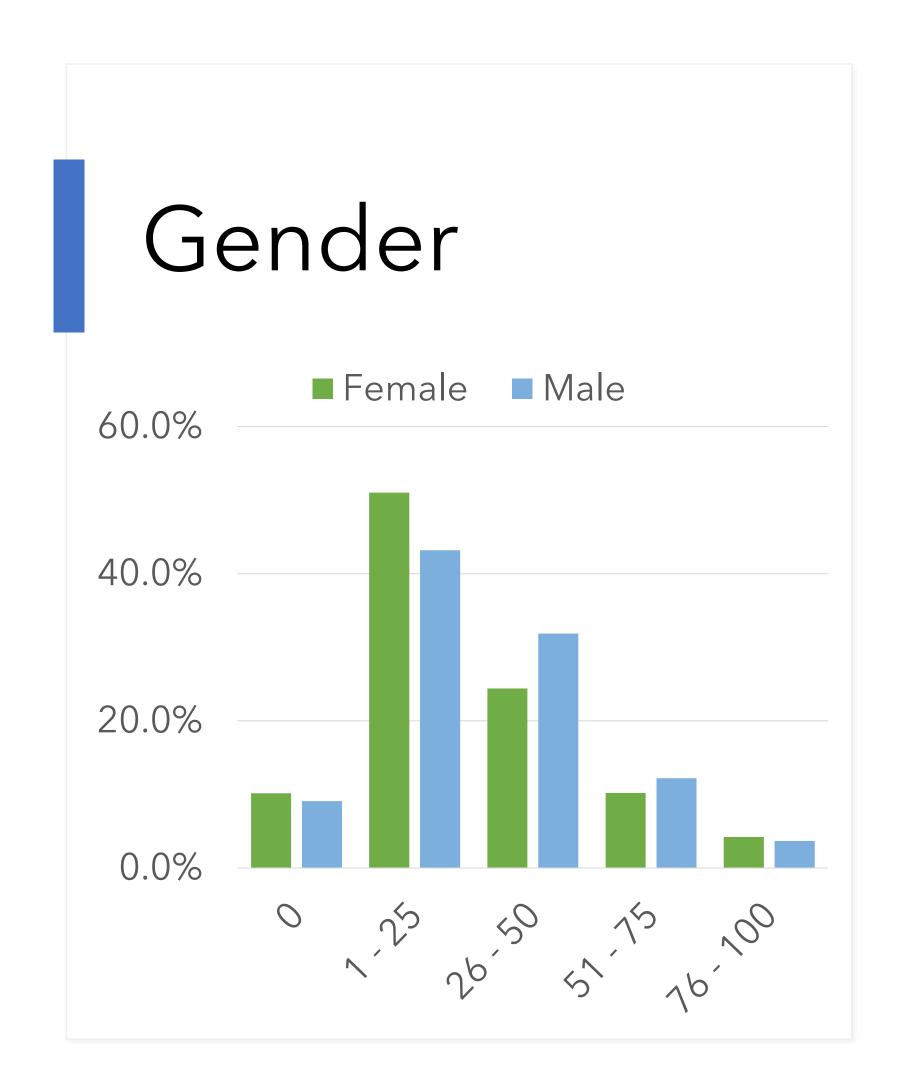
Travel Outlook

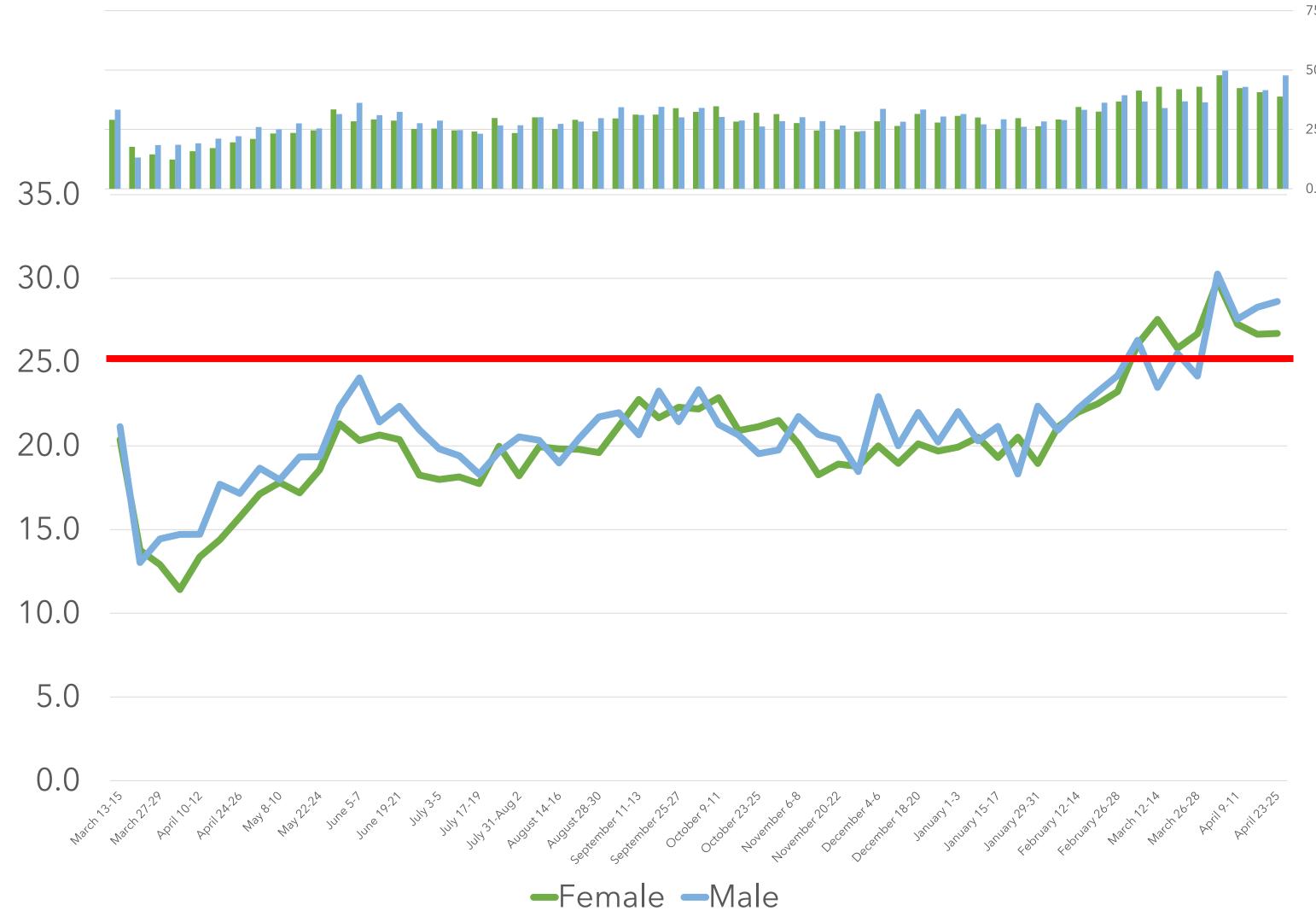


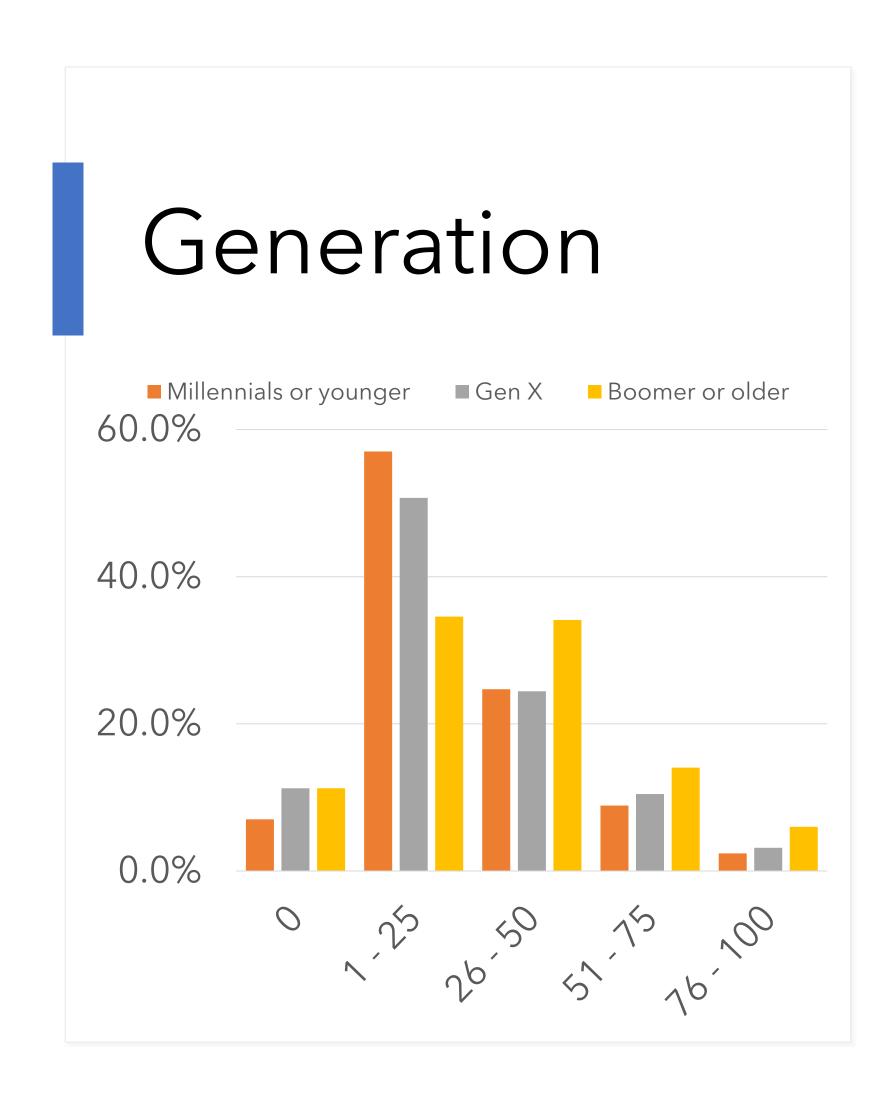


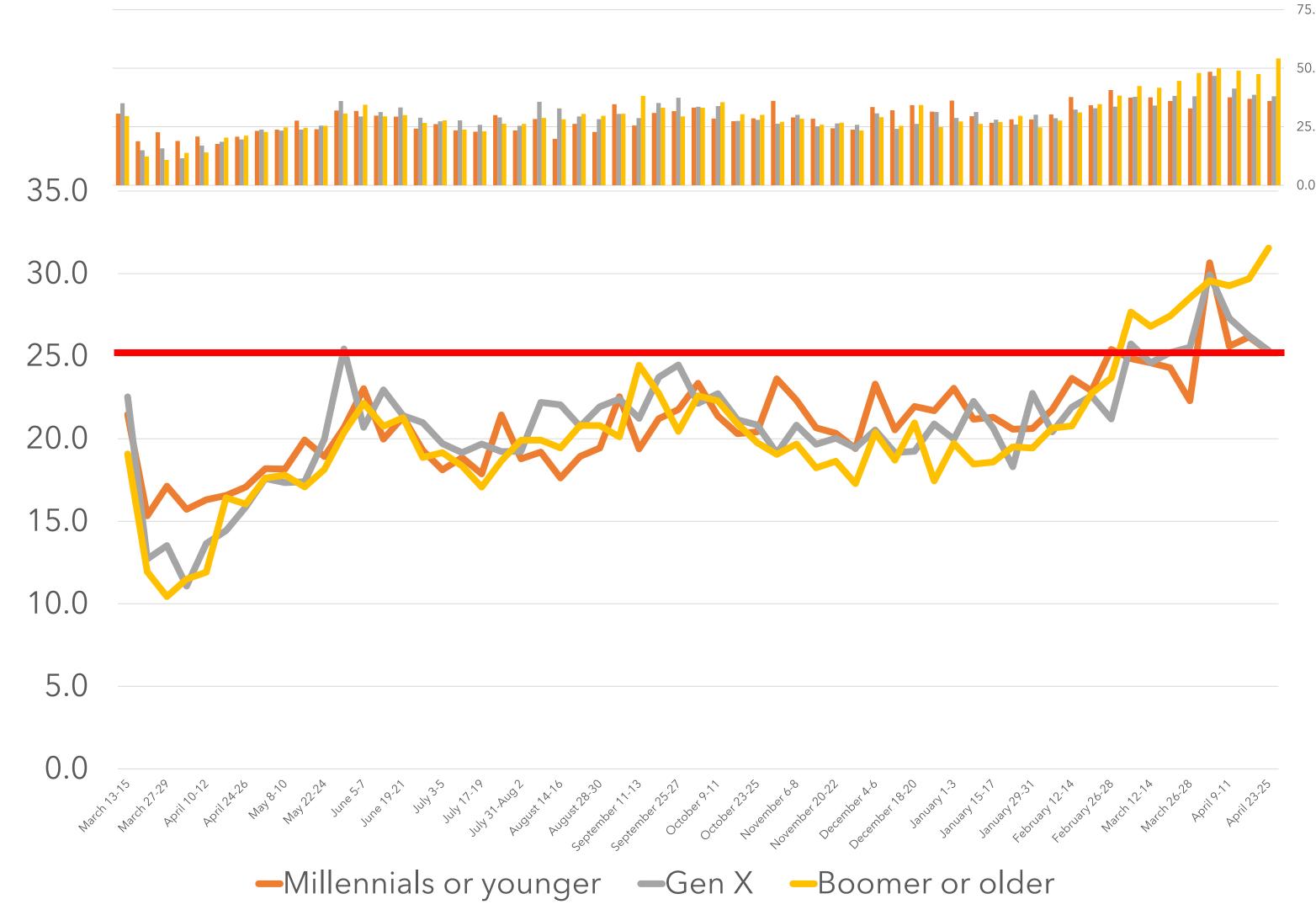


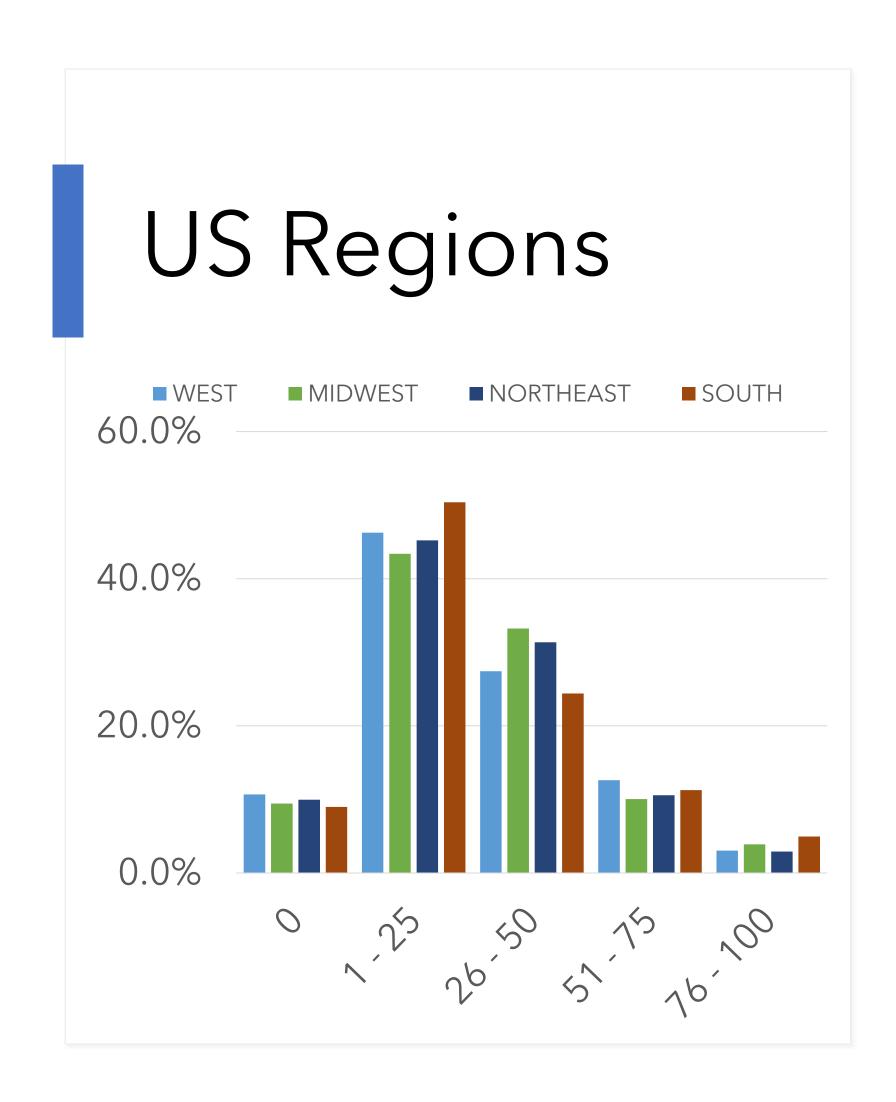


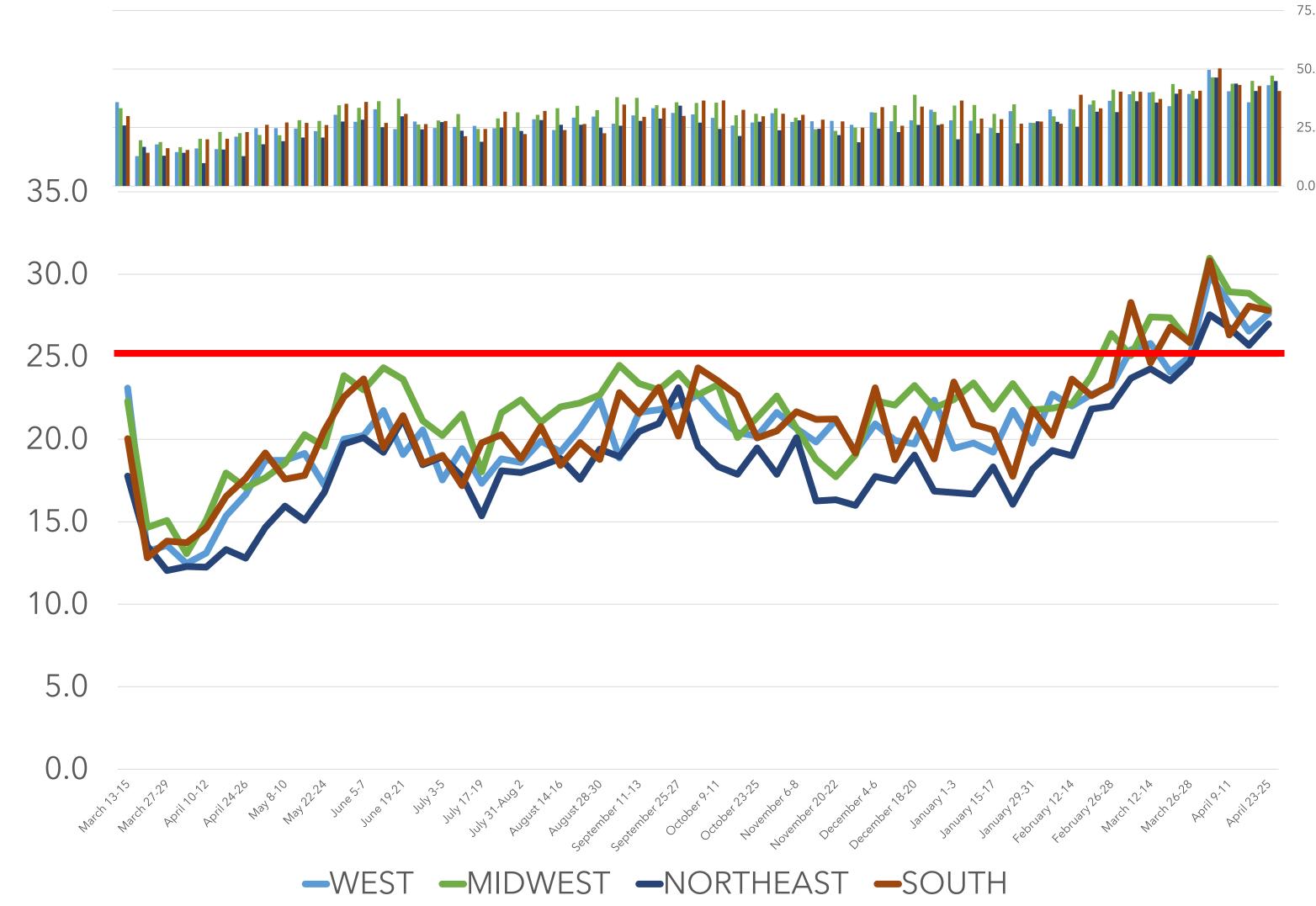


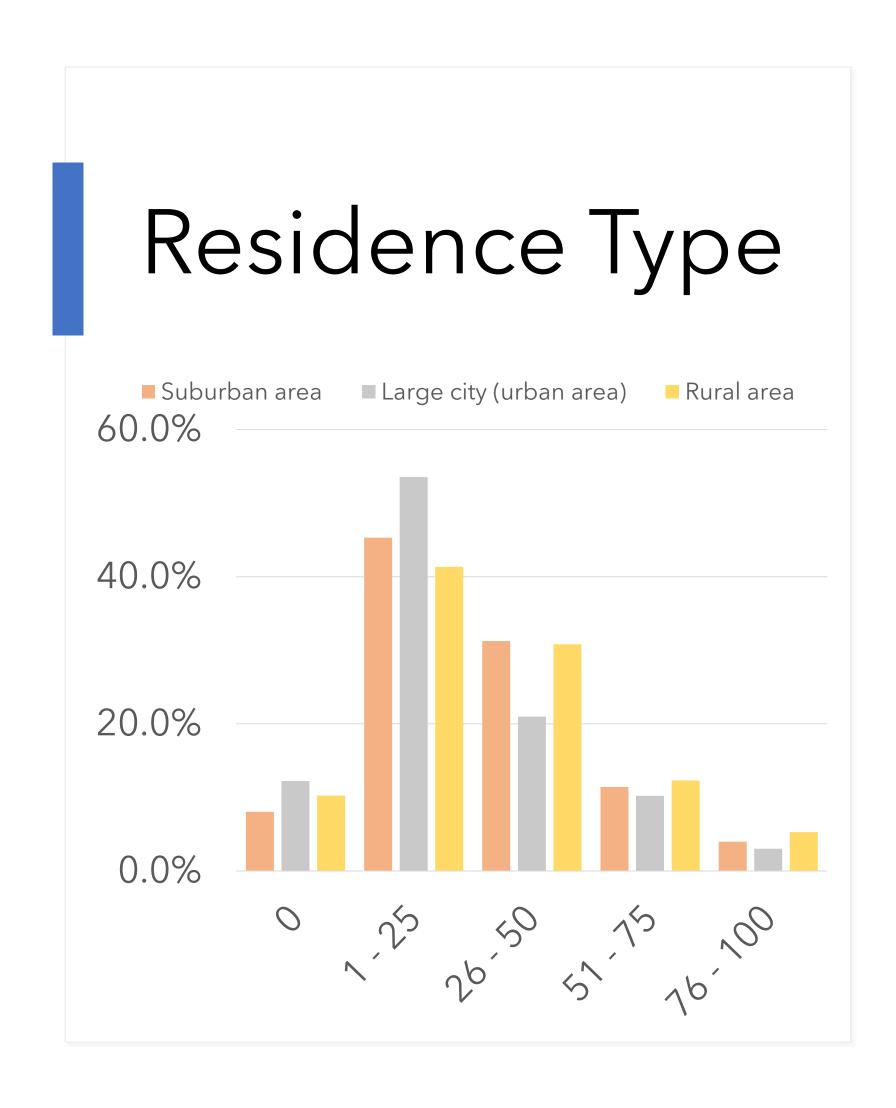


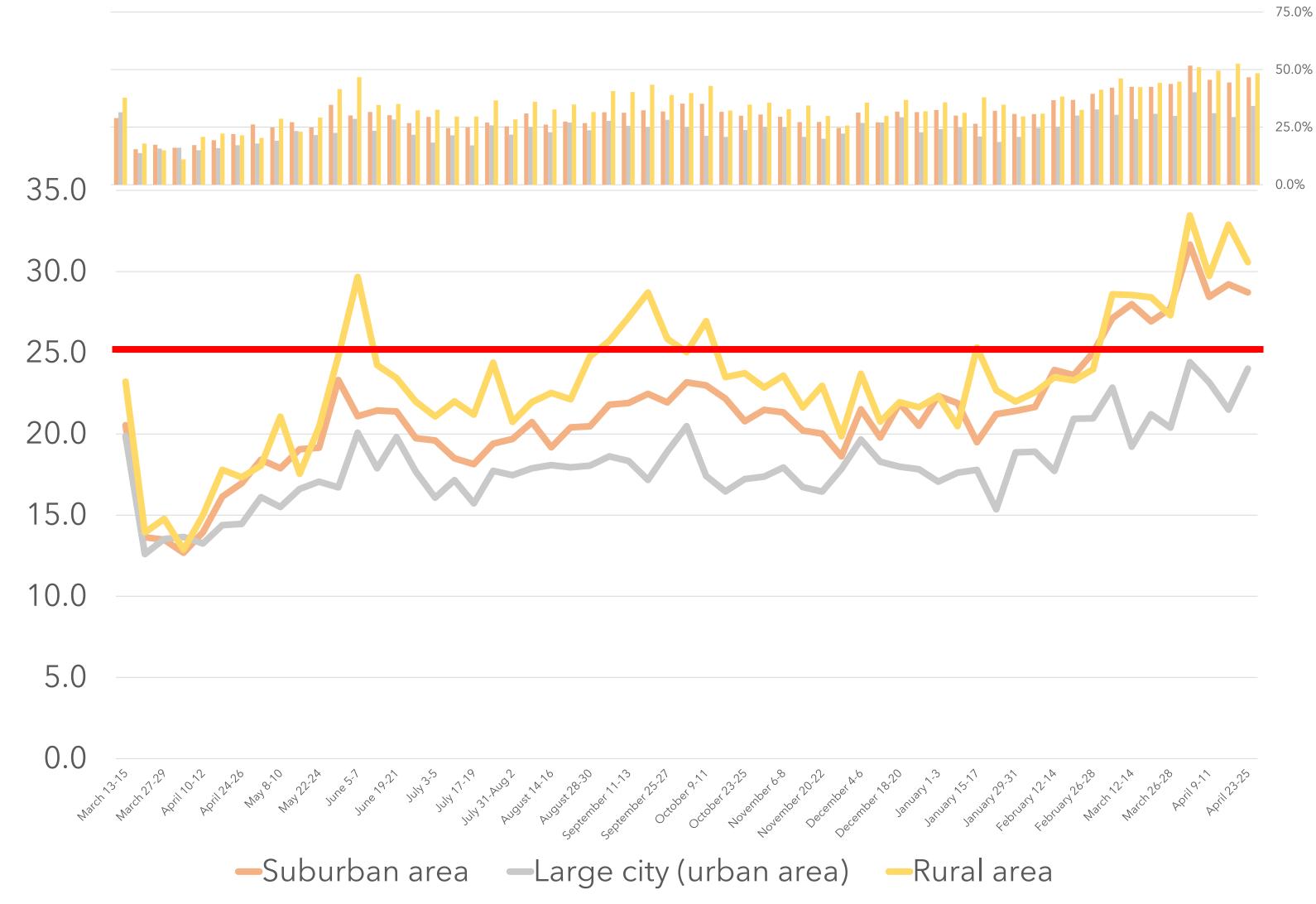


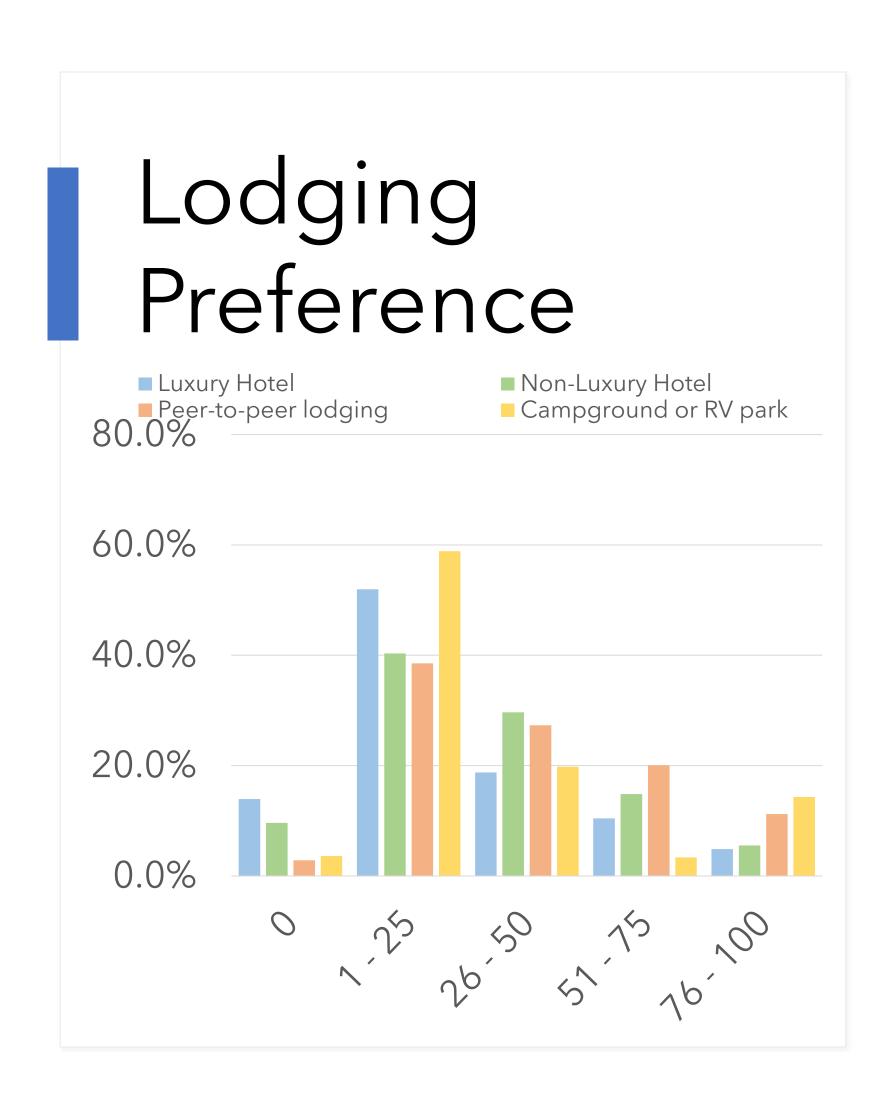


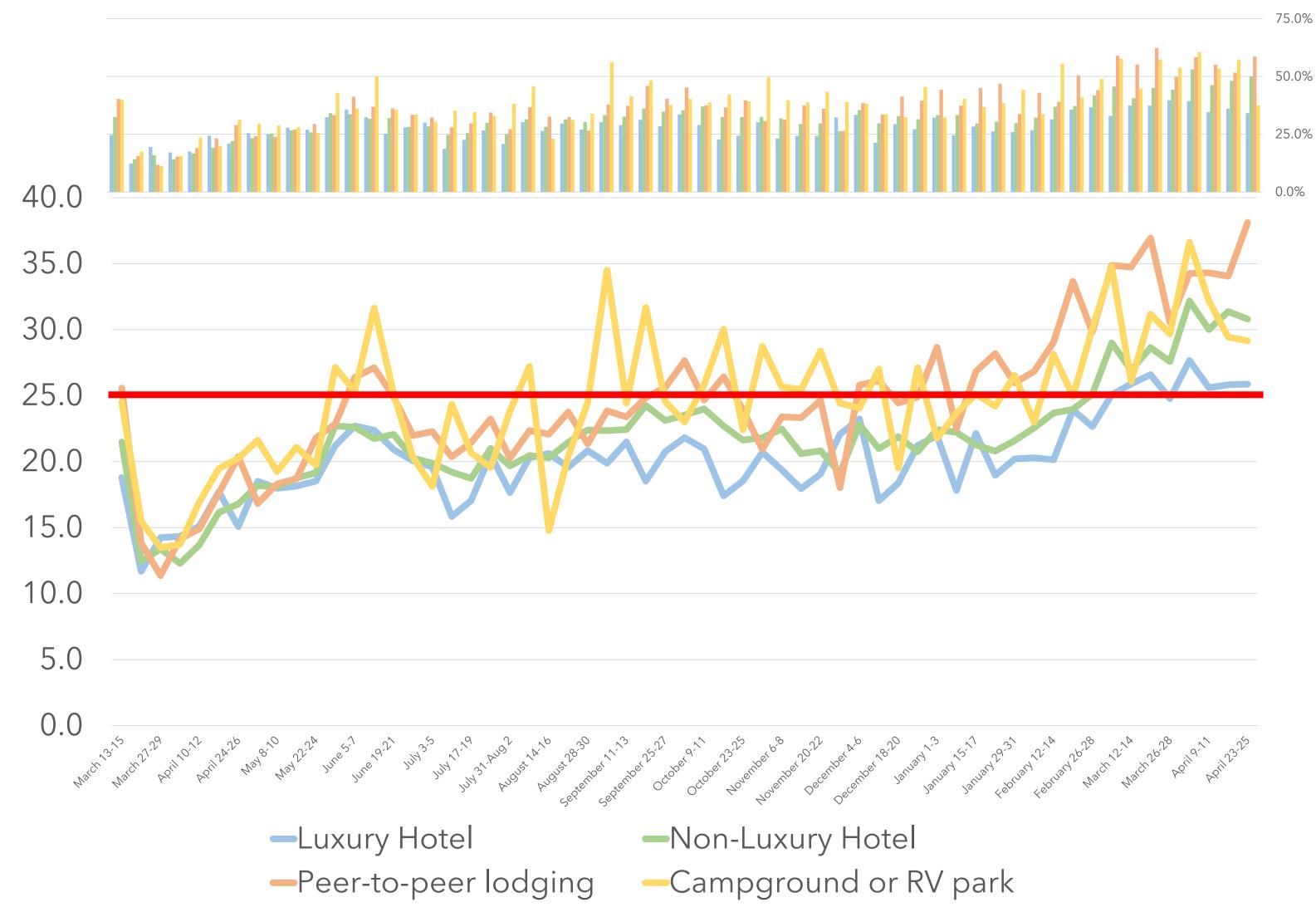














Questions? Need More Information? • We're here for you. Please email us at info@destinationanalysts.com.

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





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