DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT KEY FINDINGS-WEEK OF APRIL 5th, 2021

Destination Analysts



About Destination Analysts

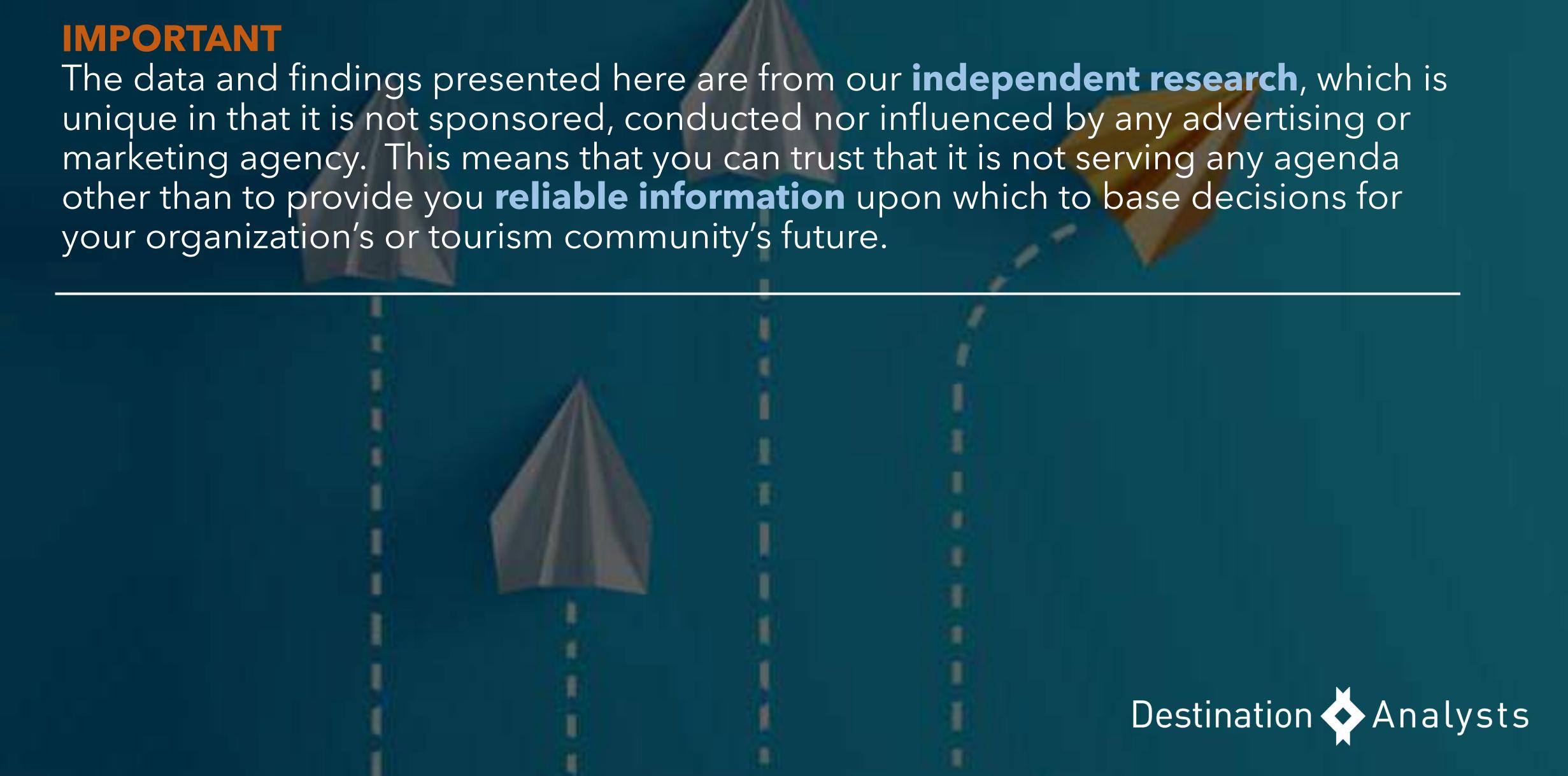
Destination Analysts is a market research company that offers businesses a breadth of insights, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

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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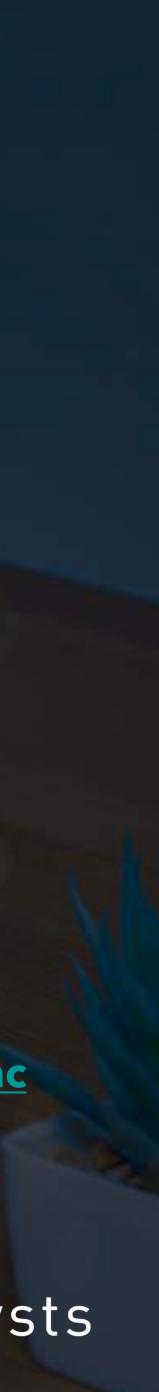
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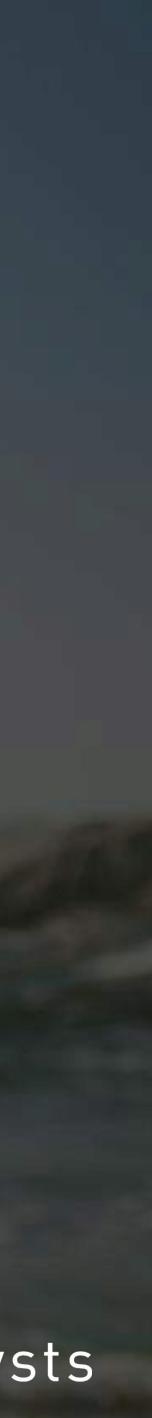


Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.

This week's travel insights update will be followed by an important conversation with a panel of Black travelers. Don't miss the opportunity to hear directly from these travelers about their unique perspectives and personal experiences and how this impacts their future travel decisions.

Sign up to attend the webinar on Tuesday, April 6th at 11:00am ET <u>here</u>.





Key Findings for the Week of April 6th Please cite Destination Analysts when using or distributing this data



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American Anxiety is Down, Normalcy in Sight

In the last week, despite record vaccination rates, new coronavirus cases were on the rise again in the United States, and health and political officials implored pandemic vigilance to continue.

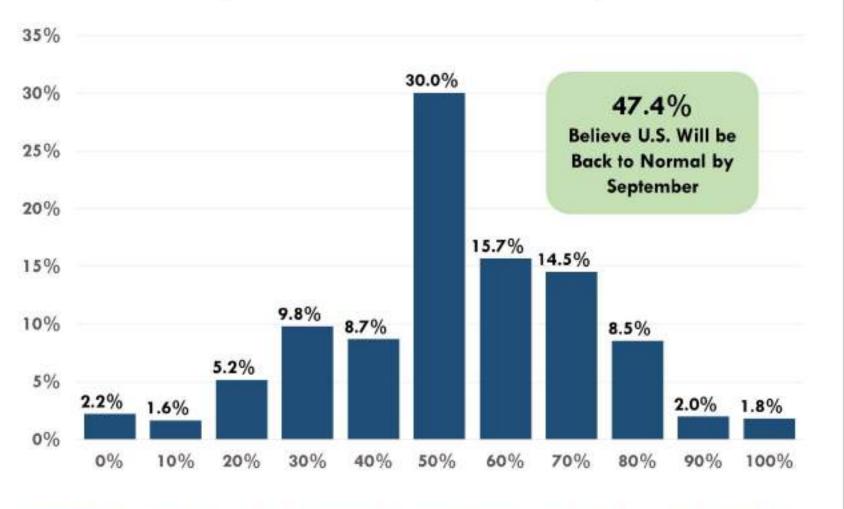
When asked the likelihood that the U.S. will experience another COVID surge in 2021, 53.8% of American travelers said that this was indeed likely—an anticipation strongest in the Midwest and among older travelers. Yet while the majority expects another surge to occur, they don't appear to believe it will necessarily impact themselves. Anxiety about contracting coronavirus—as well as the pandemic's financial impact—is down. On average, American travelers believe the United States is 52.6% back to normalcy right now. Nearly half believe their life will be back to "normal" by September.





HOW CLOSE TO NORMAL IS THE UNITED STATES?





QUESTION: OVERALL, HOW CLOSE TO "NORMAL" IS THE U.S. IN TERMS OF **RESUMING LEISURE ACTIVITIES (DINING OUT, TRAVEL, ETC.)?**

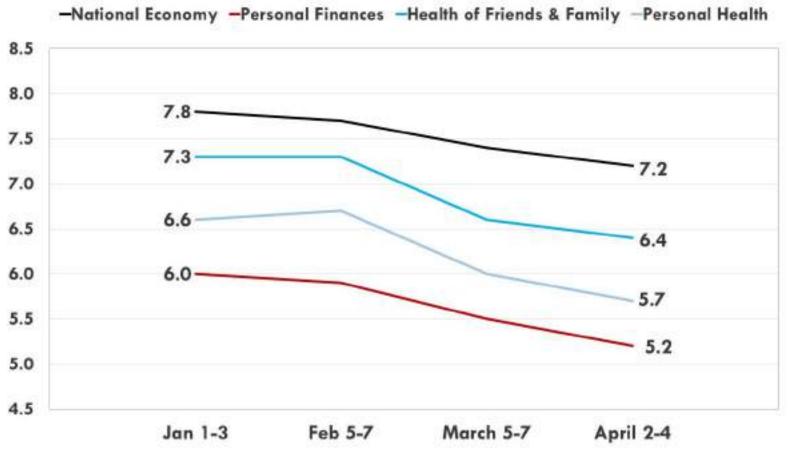
(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)



DESPITE BELIEF IN ANOTHER SURGE, AMERICAN ANXIETY IS DOWN, NORMALCY IN SIGHT **AS OF APRIL 4, 2021**

BELIEVE THERE WILL BE ANOTHER COVID-19 SURGE IN THE U.S. THIS YEAR

NATIONAL ANXIETY MAP: **HIGH CONCERNS ABOUT COVID-19'S IMPACT IS DOWN** (AVERAGE SCORE ON AN 11-POINT SCALE)

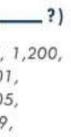


ON: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION. HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE/YOUR _____ ?)

(Base: Waves 1-56. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1204, 1,208, 1,202 and 1,206 completed surveys.)









1 Year Later, Americans Feel Very Differently About Travel

| Compared to last April, it is clear Americans feel very | 1 YEA | |
|--|--------------|--|
| differently, particularly as it relates to travel's safety. | | |
| Average perceptions of travel and leisure activities as unsafe | Percep | |
| has declined 30 percentage points in the last year. Travel | Activi | |
| avoidance—including in general, internationally and for | | |
| conventions/conferences—reached record lows this week. | 85% | |
| | | |
| The proportion of Americans confident in their ability to travel | 70% | |
| safely right now outpaces the proportion that lacks | | |
| confidence. Americans who have lost their taste for traveling | 55% | |
| for the time being—something we began tracking regularly | | |
| during the last coronavirus surge—has plunged to a low of | 40% | |
| 33.3%. For the first time ever recorded in our study, the | | |
| proportion of Americans that would NOT feel guilty traveling | 050/ | |
| (41.6%) surpassed those that would (36.2%). This week also | 25% | |
| marks another record for travel readiness, with 69.3% saying | | |
| "ready" is what describes their state-of-mind. | (Base: Waves | |
| | | |



AR LATER, AMERICANS FEEL VERY DIFFERENTLY ABOUT TRAVEL **APRIL 2020-APRIL 2021**



es 4-7 and 56. All respondents. 1,214, 1,263, 1,238, 1,208 and 1,206 completed surveys.)

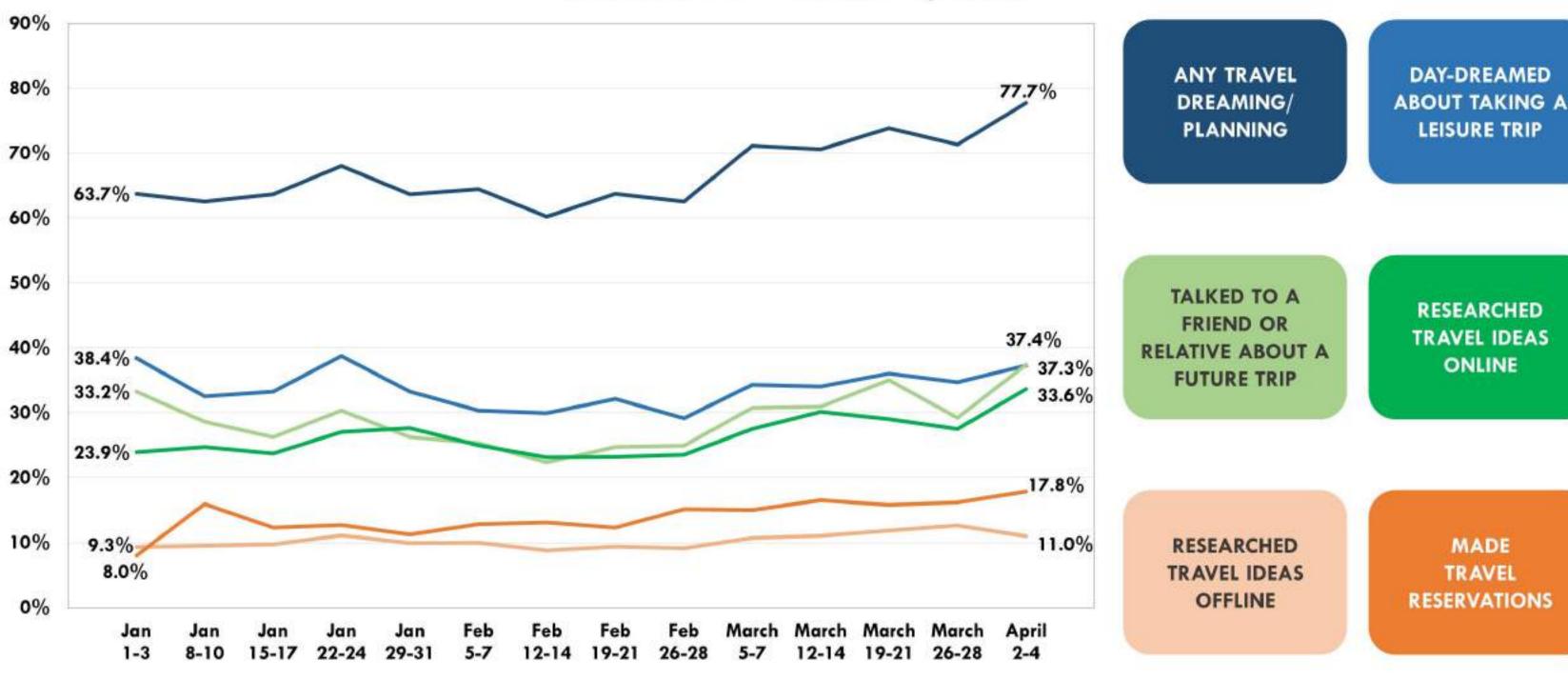


PAGE 9

Americans are Dreaming of Travel & Making Plans

About two-thirds of Americans are highly open to travel inspiration right now and the number of Americans actively dreaming about and planning travel reached a 2021 peak at 77.7%. Well over one-third day-dreamt about travel and/or discussed a future trip with someone in the last week alone. A 2021 record 33.6% researched travel ideas online in the last week, while another record 17.8% made travel reservations or bookings. Among those that made a travel booking or reservation in the last week, 57.5% report they booked a hotel room and 34.6% say they bought airline tickets.

AMERICANS ARE DREAMING OF TRAVEL & MAKING PLANS AT RECORD LEVELS FOR 2021 JANUARY 1-APRIL 4, 2021



THE PAST WEEK I HAVE _____

(Base: Waves 43-56. 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 and 1,206 completed surveys.)



QUESTION: IN THE PAST WEEK, WHICH OF THE FOLLOWING HAVE YOU DONE? (SELECT ALL THAT COMPLETE THE SENTENCE) IN















When Americans Expect to Take Leisure Trips

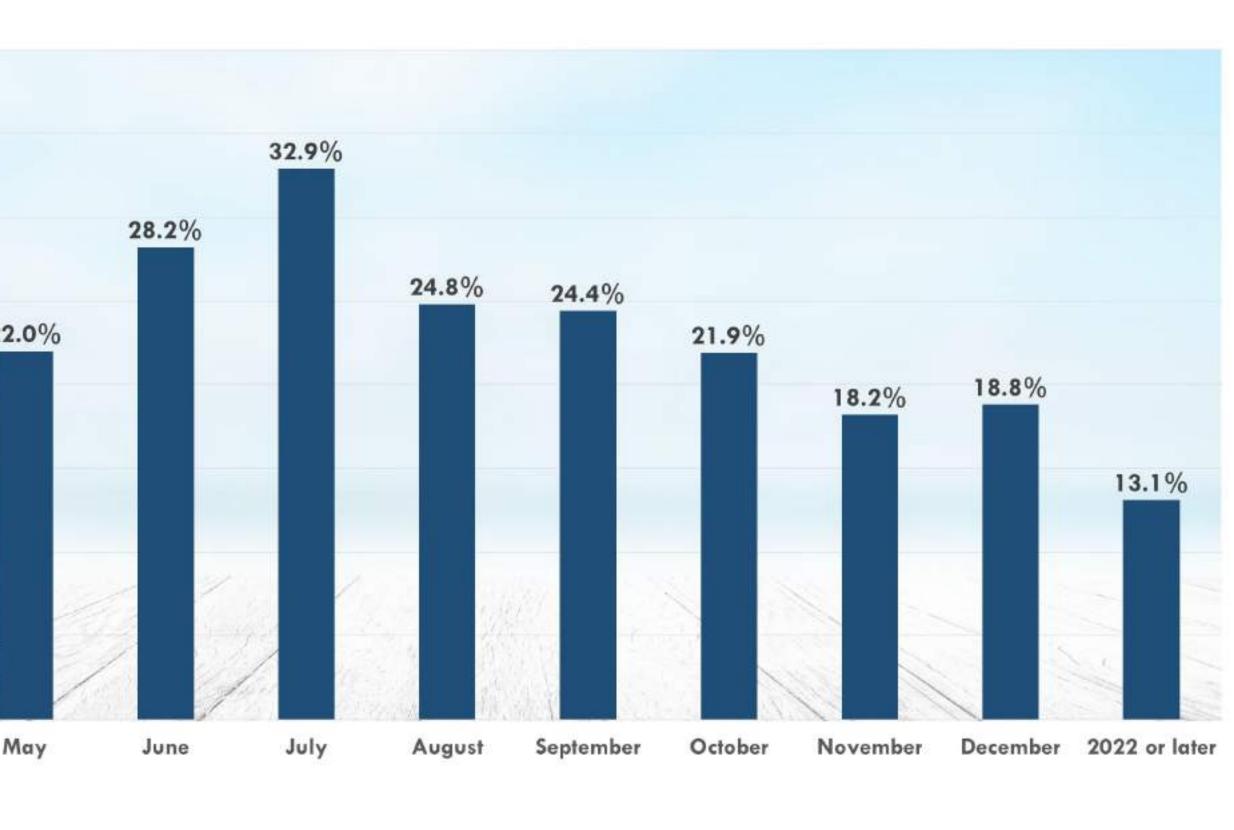
WHEN AMERICANS EXPECT TO TAKE LEISURE TRIPS AS OF APRIL 4, 2021

| In terms of when Americans will go traveling, | 40% | | |
|--|------|-------|------|
| nearly 60% say they will take a trip within the next | 35% | | |
| three months. | 220/ | | |
| | 30% | | |
| July continues to strengthen as a peak month for | 25% | | 22.0 |
| travel, as now one-third of American travelers | 20% | | |
| report at least tentative trip plans for that month. | | 15.2% | |
| Travel also looks to continue this Fall—nearly a | 15% | | |
| quarter of American travelers say they have trips | 10% | | |
| planned for September and about 22% have at | 5% | | |
| least tentative plans in October. | - 04 | | |
| | 0% - | April | M |

QUESTIONS: EVEN IF ONLY TENTATIVELY SCHEDULED, IN WHICH MONTHS DO YOU CURRENTLY PLAN TO TAKE ANY LEISURE TRIPS? (SELECT ALL THAT APPLY)

(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)





















Local Resident Sentiment

This growing positivity towards travel overall extends to how Americans feel about tourism in their own communities. This week, nearly 54% say they are comfortable going out for leisure activities where they live—a pandemic-era record-high.

Meanwhile, 41.3% say they are not ready for tourists in town just yet—however, this is a far cry from the 67.6% who felt this way a year ago (and also represents a record low). Nearly 47% of American travelers say they would be happy to see an ad promoting where they live as a place for tourists to visit when safe. Positive sentiment towards tourism in one's own community is generally much stronger among those Millennial-age compared to those in older generations.







(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)



LOCAL RESIDENT SENTIMENT TOWARDS TRAVEL **IS AT A PANDEMIC-PERIOD HIGH AS OF APRIL 4, 2021**

Are comfortable going out for leisure activities in their own community, up from 22% in April 2020



Would be happy to see an ad promoting tourism to their own community, up from 33% in May 2020



Don't want tourists in their community just yet, down from 67% in April 2020





PAGE 12



Comfort with COVID Passports & Proof of Vaccination Requirements

This week, 48.2% of American travelers report they have already been vaccinated against COVID-19. The U.S. rapidly vaccinating its population combined with desires for the final holdouts of normalcy to return has fueled much conversation about vaccine passports. While vaccine passports are being debated in the political realm, it appears that, particularly for certain activities, an important proportion of American travelers is in favor of proof-ofvaccination policies.

When asked how comfortable they would be with vaccine passports being used widely in the U.S. to allow access to public activities, 52.0% said they would be comfortable or very comfortable—a feeling strongest among older travelers and those who have already been vaccinated. A majority of American travelers also say they believe proof of COVID-19 vaccination should be required for entry to the United States from another country, boarding a cruise line, and boarding a commercial flight. More than 4-in-10 say they believe vaccination proof should be required to attend an indoor performance like a concert and to attend large scale outdoor sporting events. 3-in-10 even currently say it should be required for indoor restaurant dining.



72.9% Entry to the U.S. from another Country



59.8% Boarding a Commercial Flight



43.3%

Attending Large-Scale Outdoor **Sporting Events**

(Base: Wave 56 data. All respondents, 1,206 completed surveys. Data collected April 2-4, 2021)

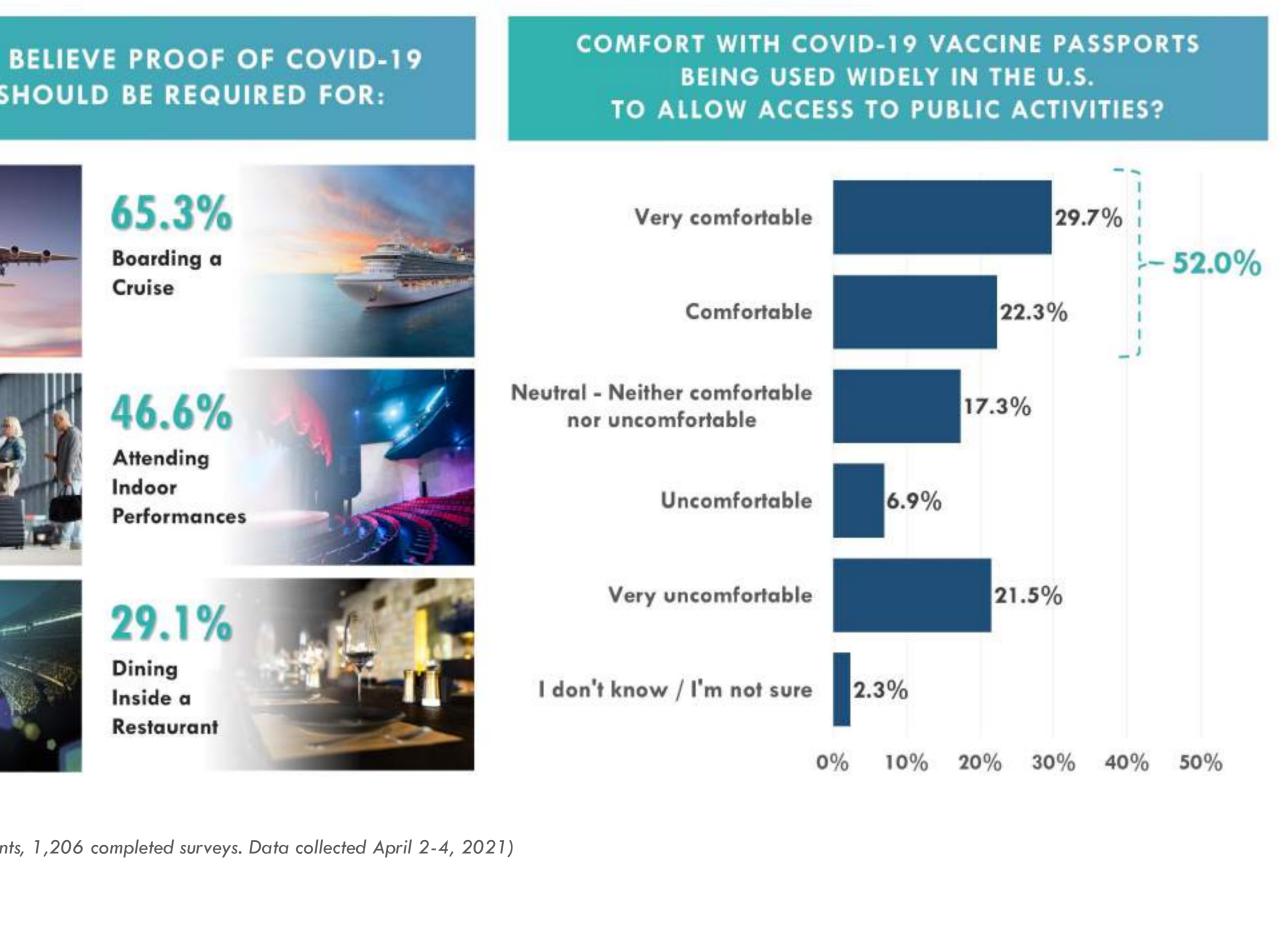


AMERICANS COMFORT WITH COVID PASSPORTS & PROOF OF VACCINATION REQUIREMENTS

AS OF APRIL 4, 2021

AMERICANS WHO BELIEVE PROOF OF COVID-19 VACCINATION SHOULD BE REQUIRED FOR:

BEING USED WIDELY IN THE U.S. TO ALLOW ACCESS TO PUBLIC ACTIVITIES?





1001101010001101 (010000110)1001101010000 п. 2 1 1 0 0 1 1 0 1 0 1 **Coronavirus Travel Sentiment Index** Measuring the Potential Influence of Travel Marketing Highlights from the Week of April 5th 0 1 **1 0 1 1 1 1 0 0 1 1 0 1 0 1 0 0 0 1 1 0** 0101100010011010001100 LNP 1 1 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:

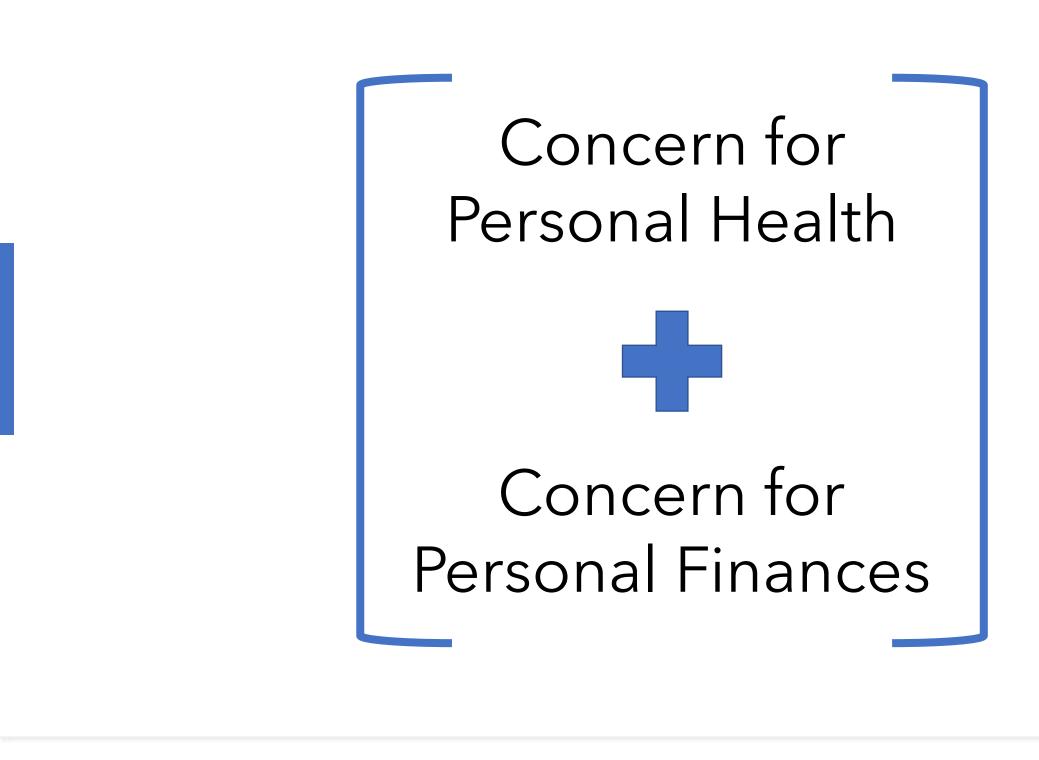
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel





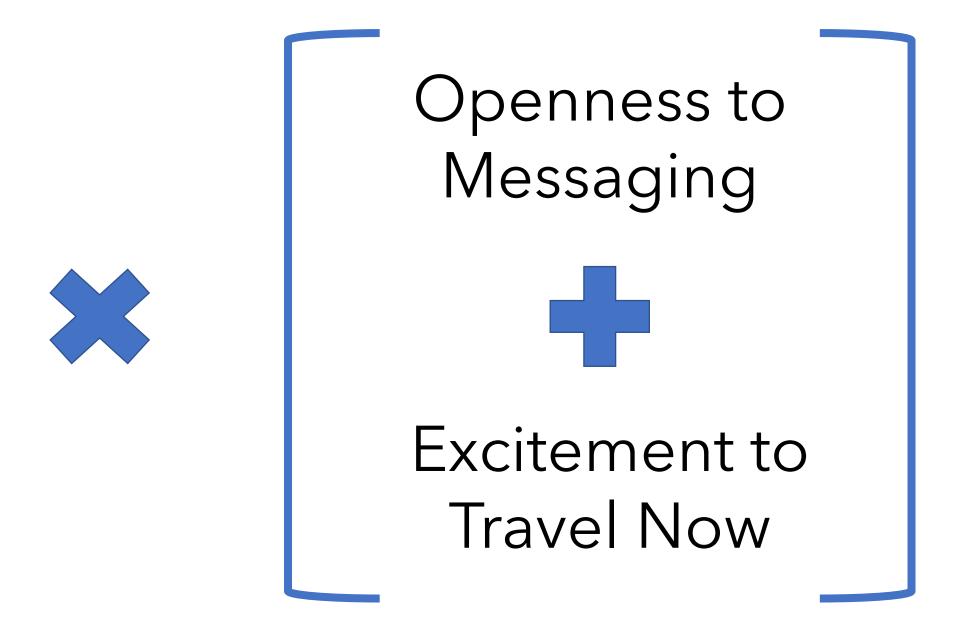


Predictive Index Formula



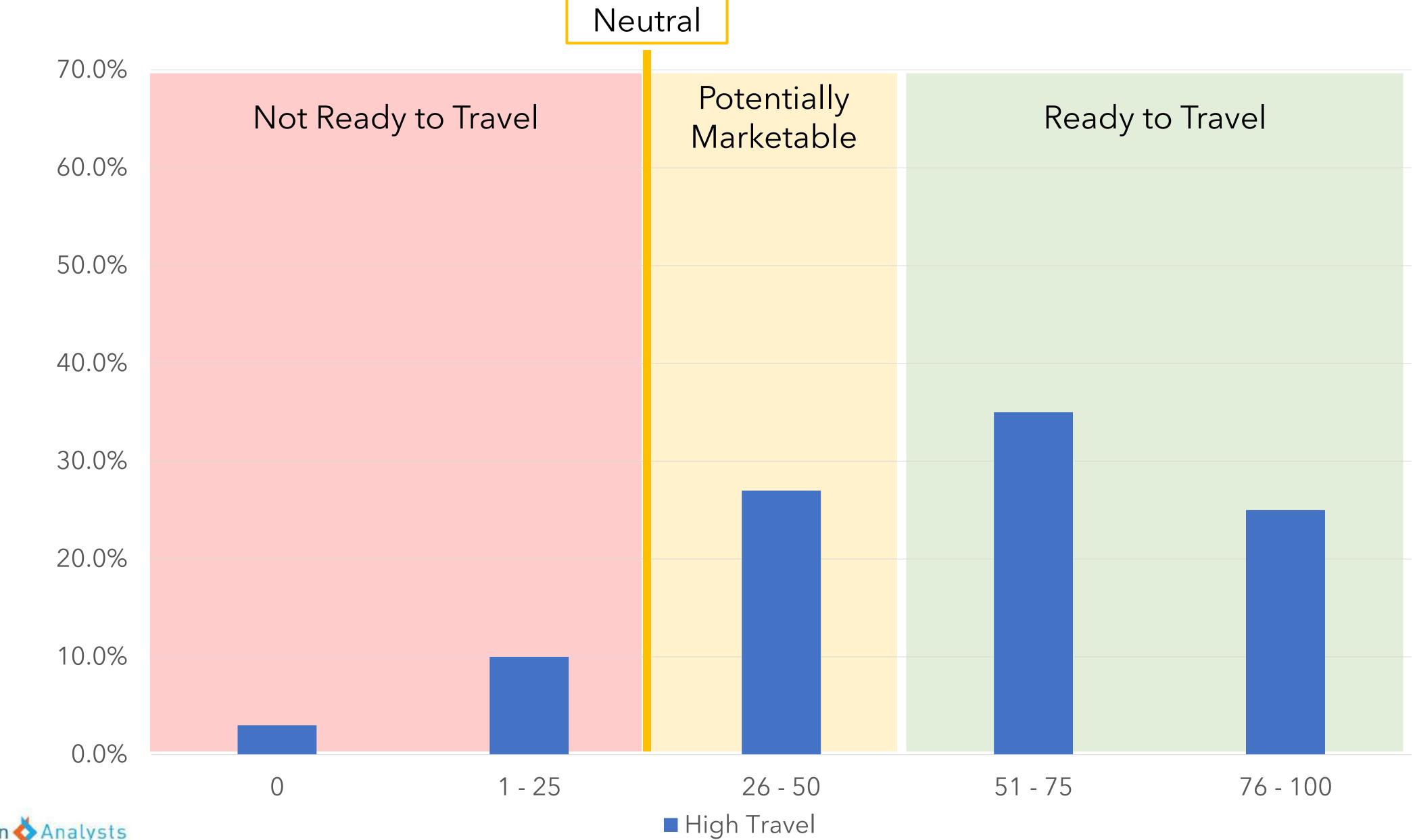
*Normalized to a 100pt scale







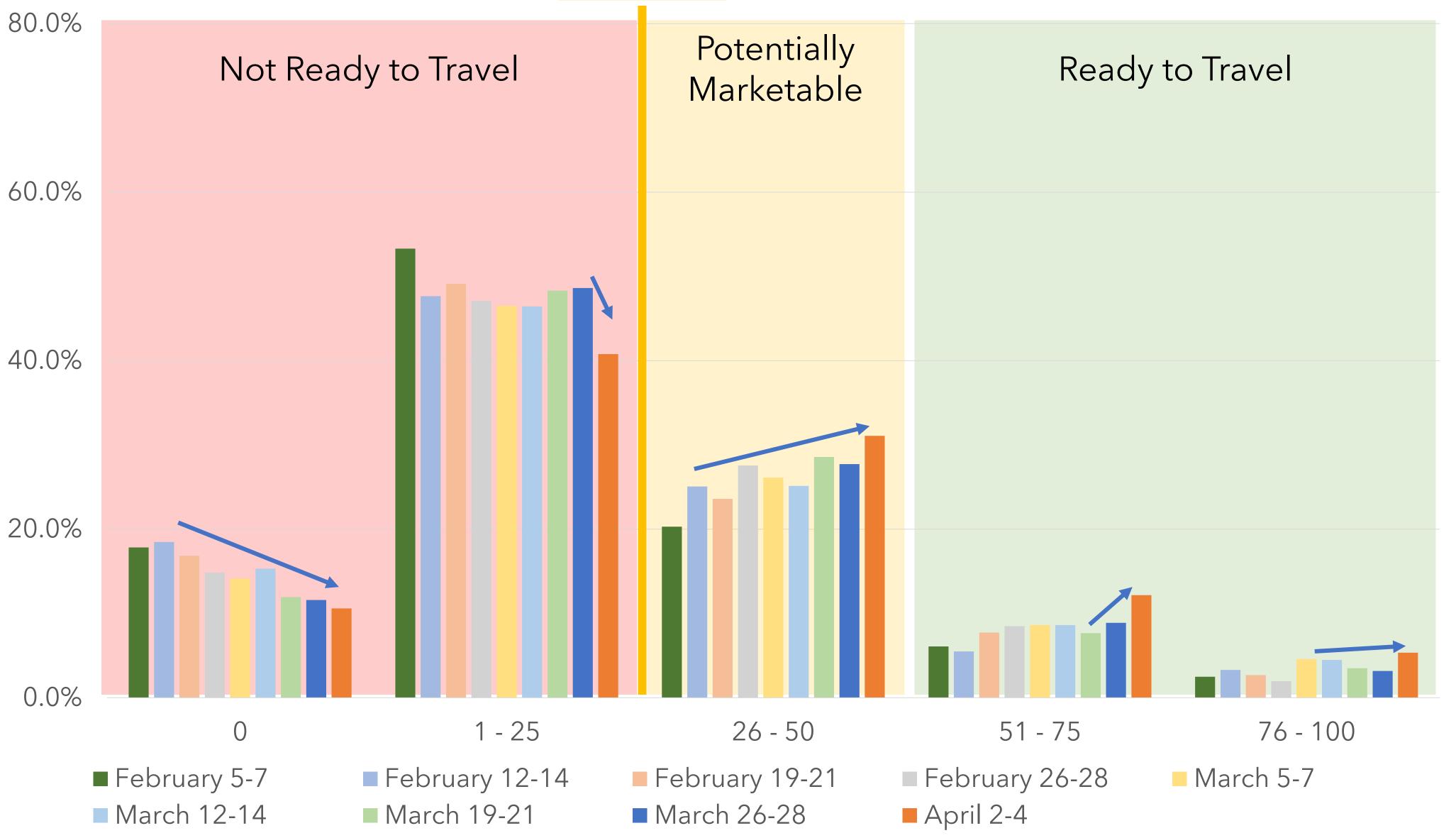
Healthy Travel Outlook



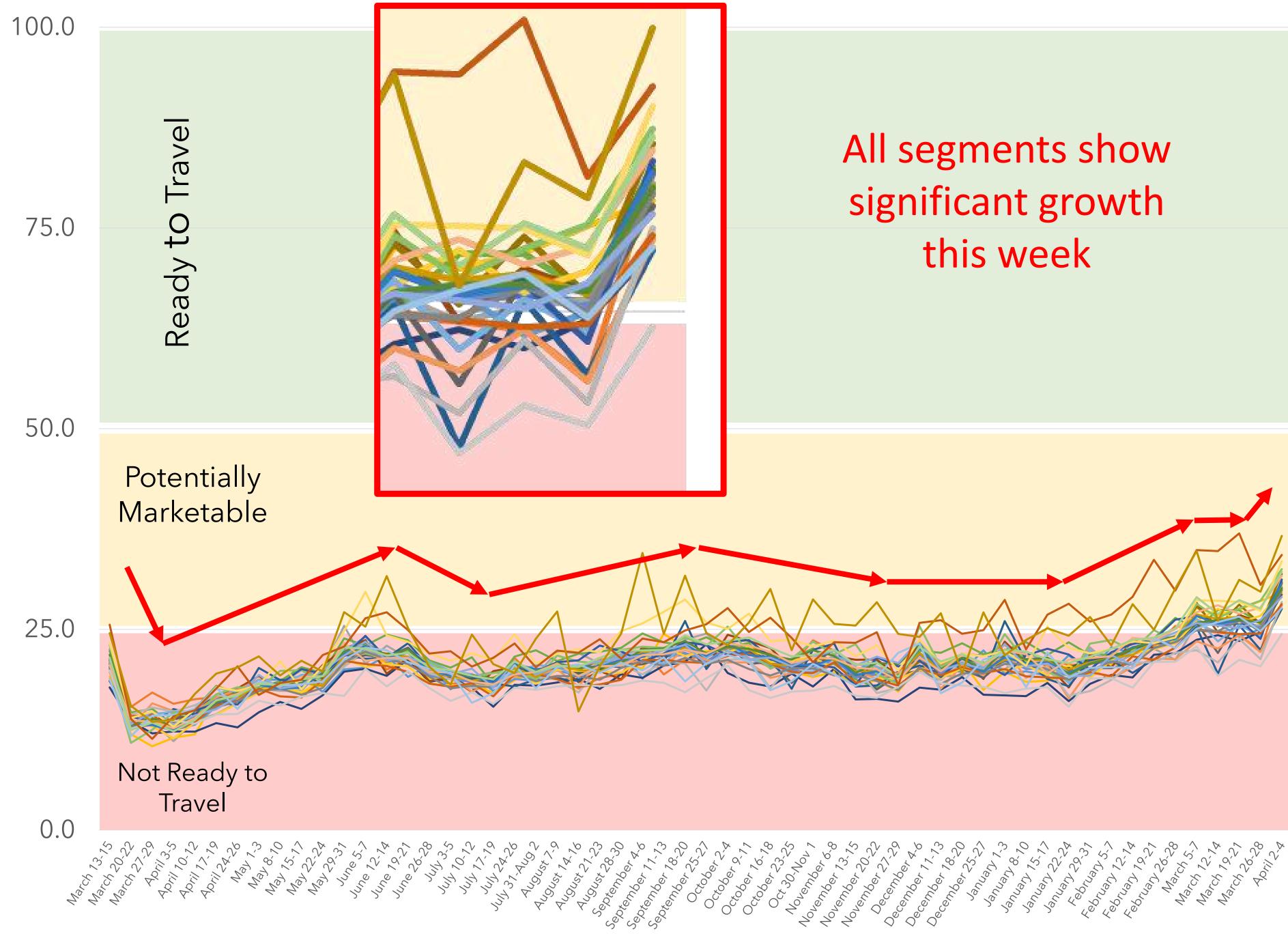




Neutral



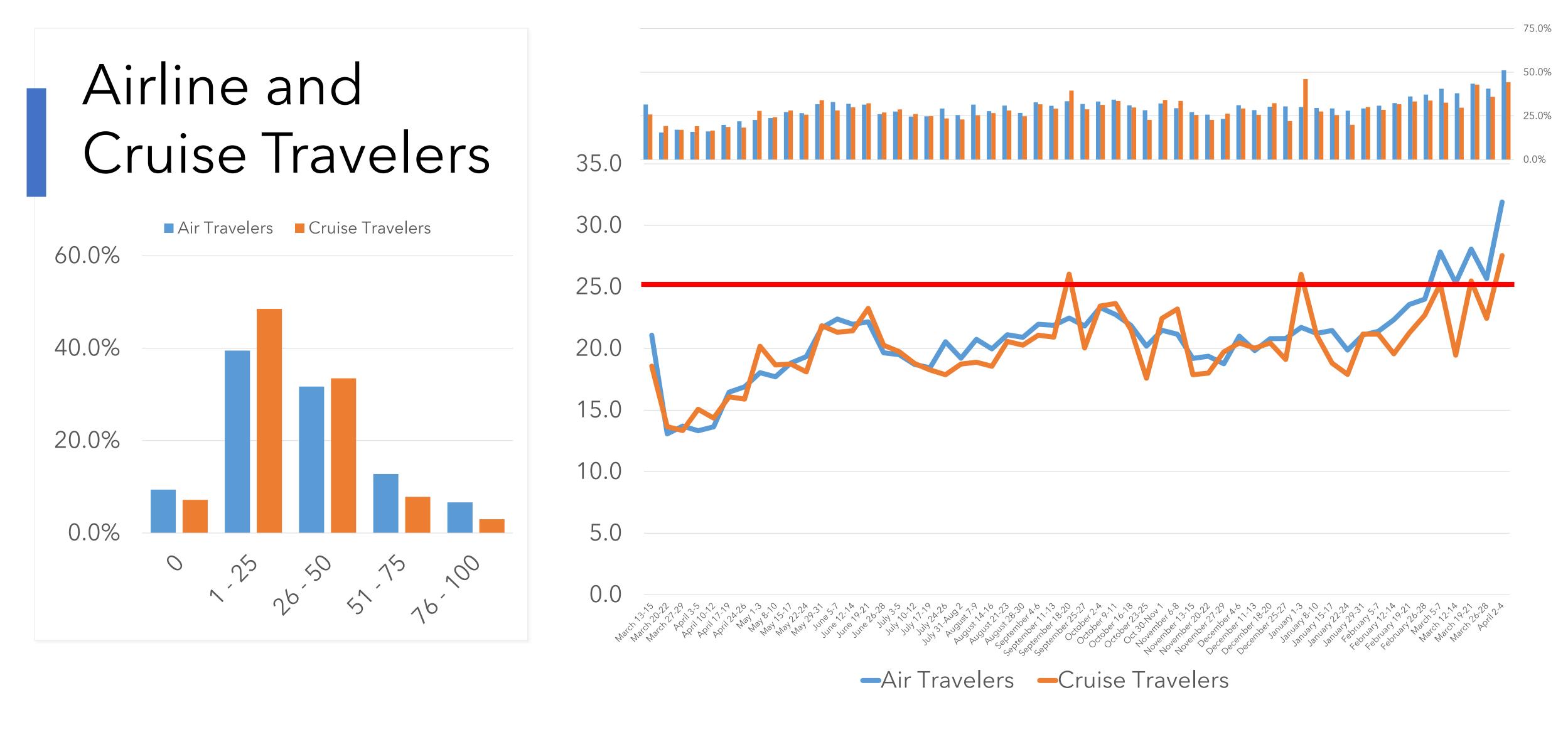


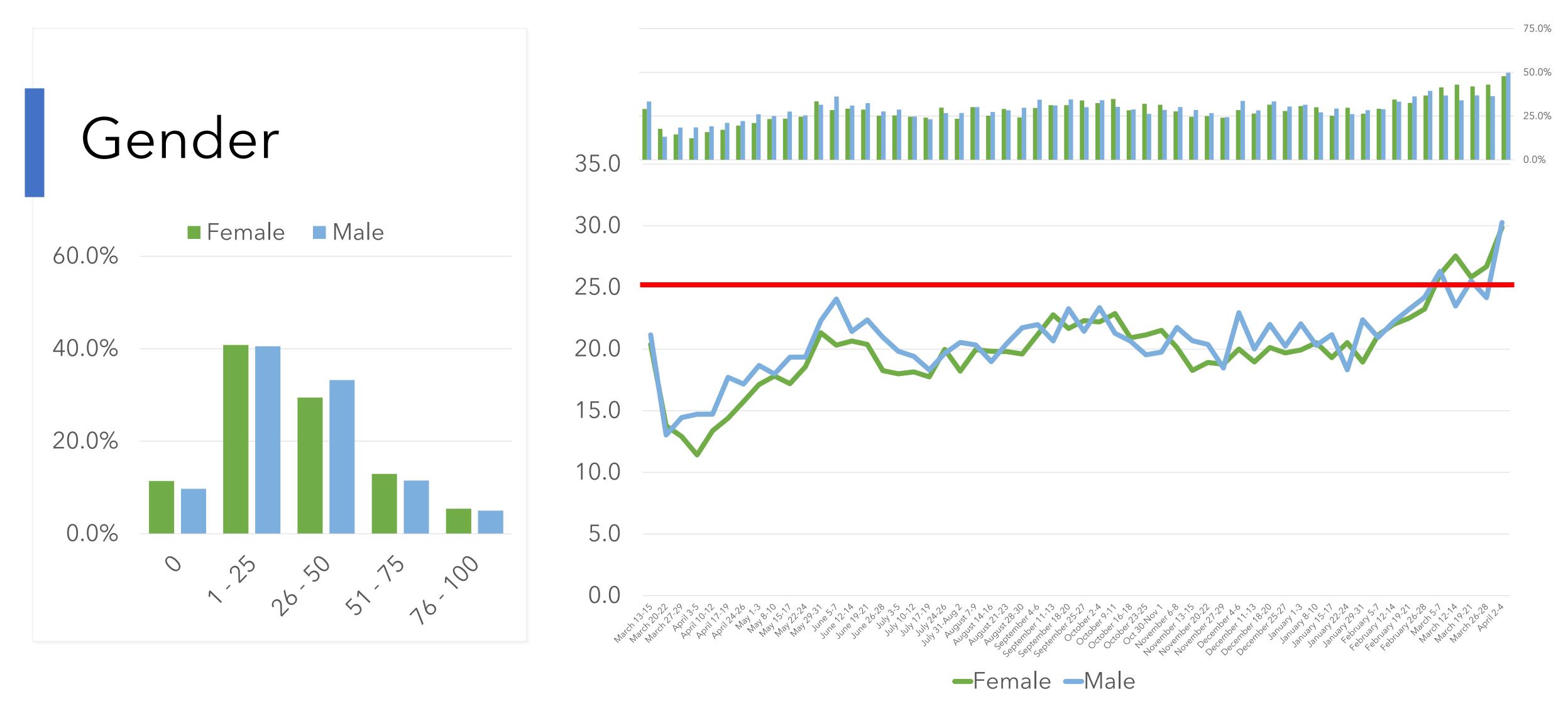


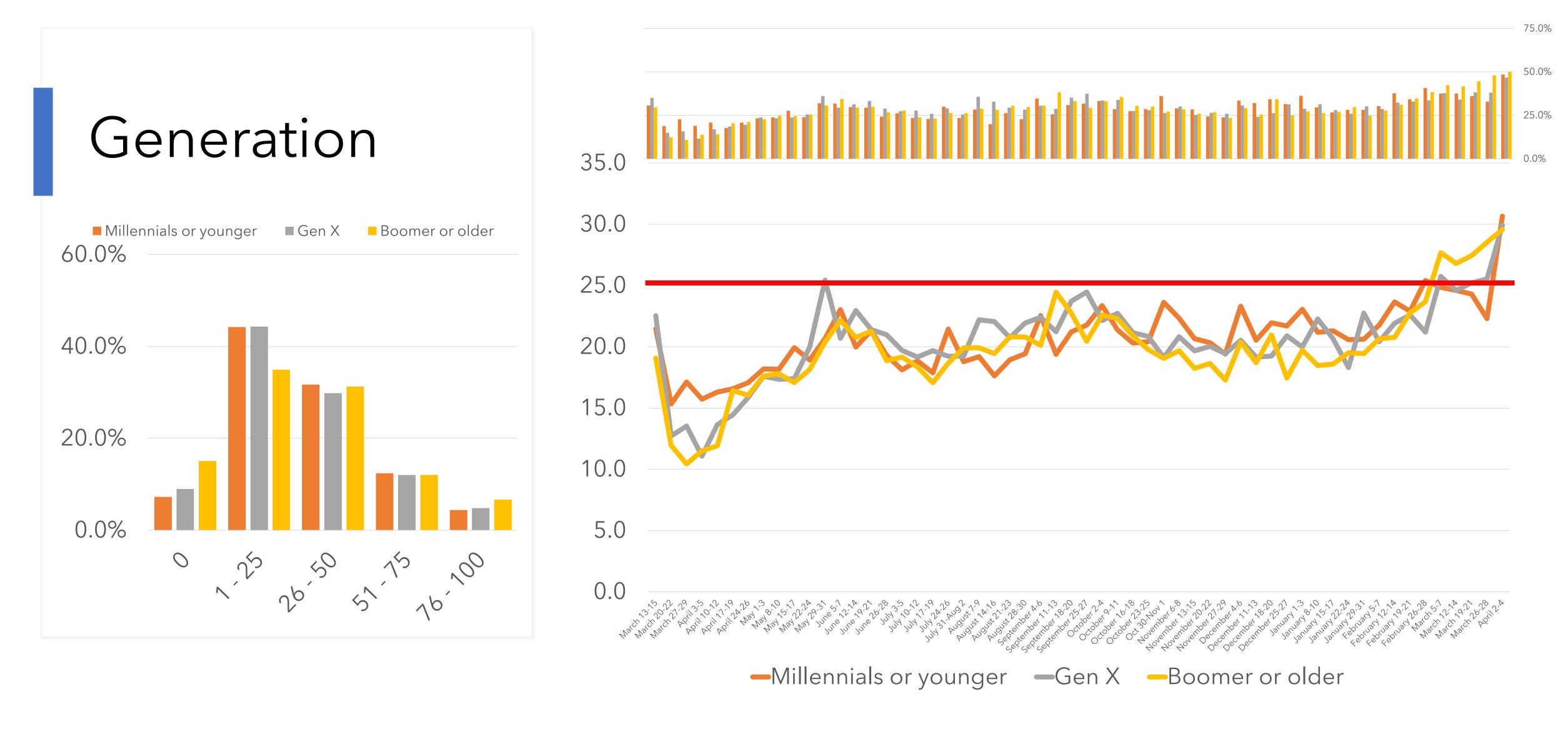
—Total

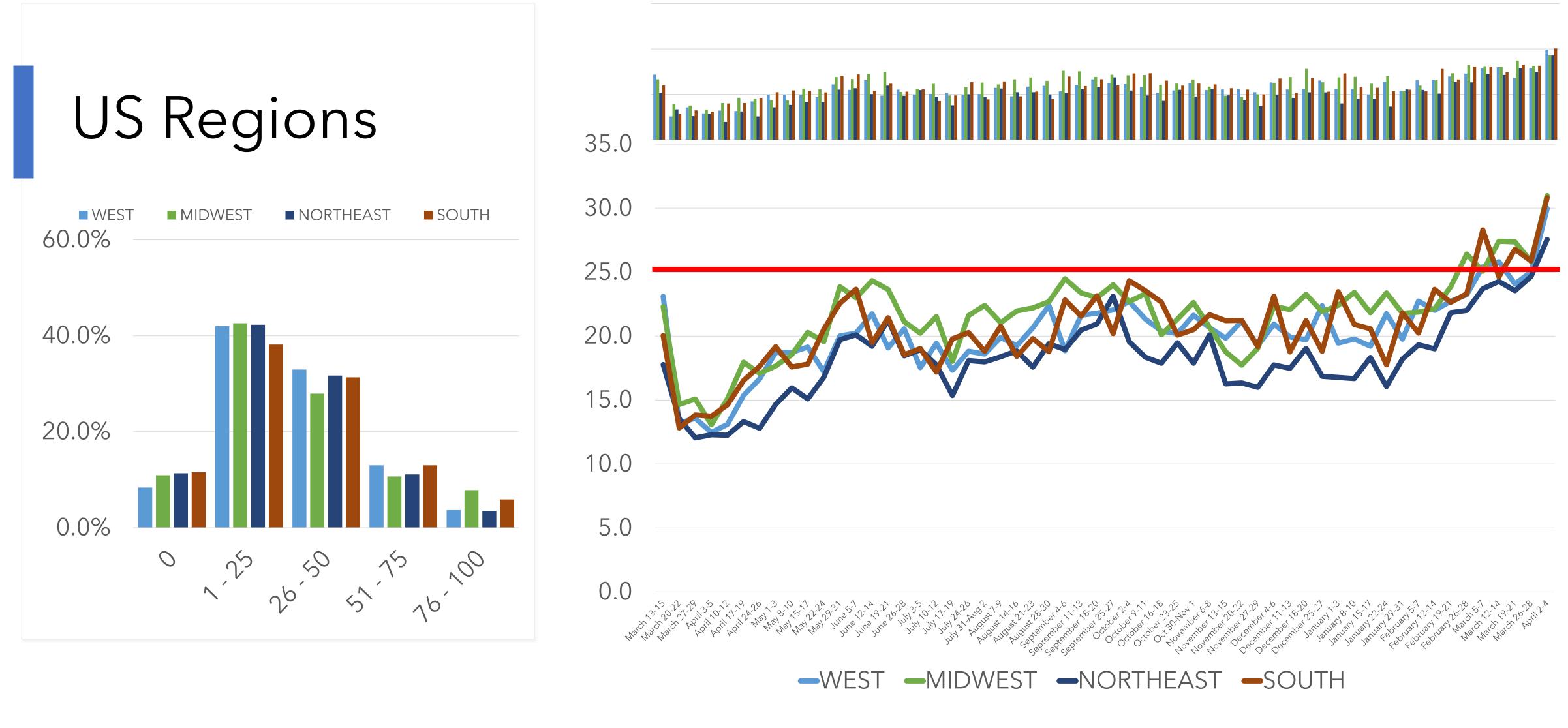
- -Millennials or younger
- —Gen X
- -Boomer or older
- -WEST
- -MIDWEST
- -NORTHEAST
- -SOUTH
- —International Travelers
- —Air Travelers
- -Cruise Travelers
- -Leisure Travelers
- -VFR Travelers
- -Business Travelers
- —Female
- -Male
- —Affluent Over \$125K
- **—**\$80K \$125K
- —Under \$80K
- -City Travelers
- -Beach Travelers
- -US National Parks 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



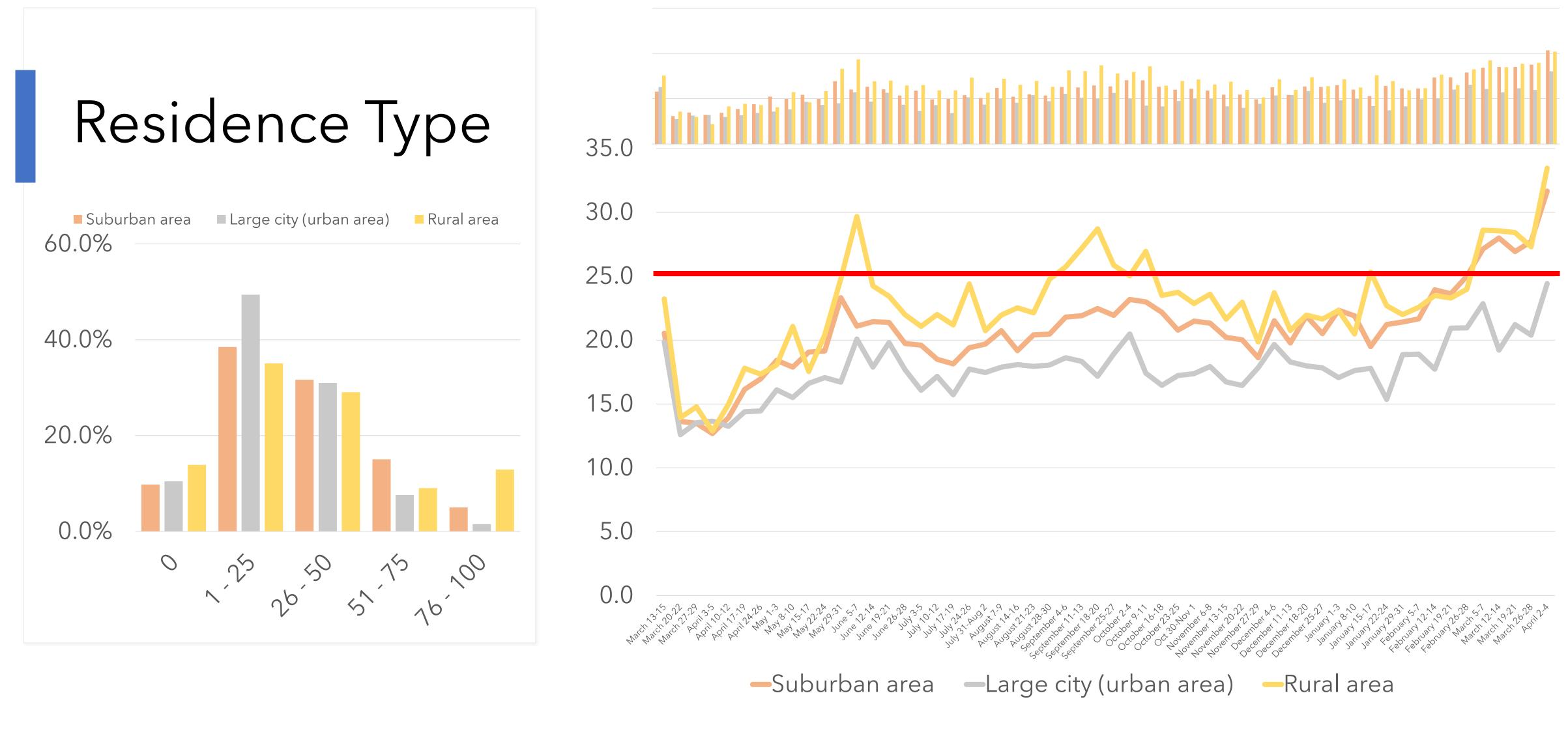


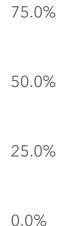




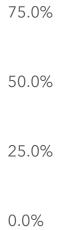














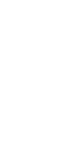
Questions? Need More Information?

• 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/

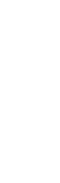












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