

DESTINATION ANALYSTS'
CORONAVIRUS
TRAVEL SENTIMENT
INDEX REPORT

KEY FINDINGS—WEEK OF November 9th, 2020

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

This week's event will feature a panel of major event producers, who will share about the state of their industry's recovery and what can be expected in the next few months.

**Sign up to attend the webinar on
Tuesday, November 10th at 11:00am ET
[here.](#)**

Key Findings for the Week of November 9th

Please cite **Destination Analysts** when using or distributing this data

Americans' Travel State of Mind

Americans spent much of the last week awaiting election results and watching COVID-19 continue to set new records in our country--hitting the highest daily number of new cases since the pandemic began.

While Americans overwhelmingly remain in an elevated state of anxiety, they may be feeling slightly more hopeful. This week, somewhat fewer feel the coronavirus situation is going to get worse in the next month (58.7% down from 60.9%). After worsening for two weeks, the perceptions of travel activities as safe rebounded back to pandemic-period low levels. Excitement for a potential getaway and openness to travel inspiration improved, as did the ability of discounts and price cuts to motivate travel. Less Americans agree that they wouldn't be able to fully enjoy it if they traveled right now, dropping 5% in the last two weeks (60.1% to 55.1%). **Thus, nearly 6-in-10 Americans have returned to a readiness state of mind around travel.**

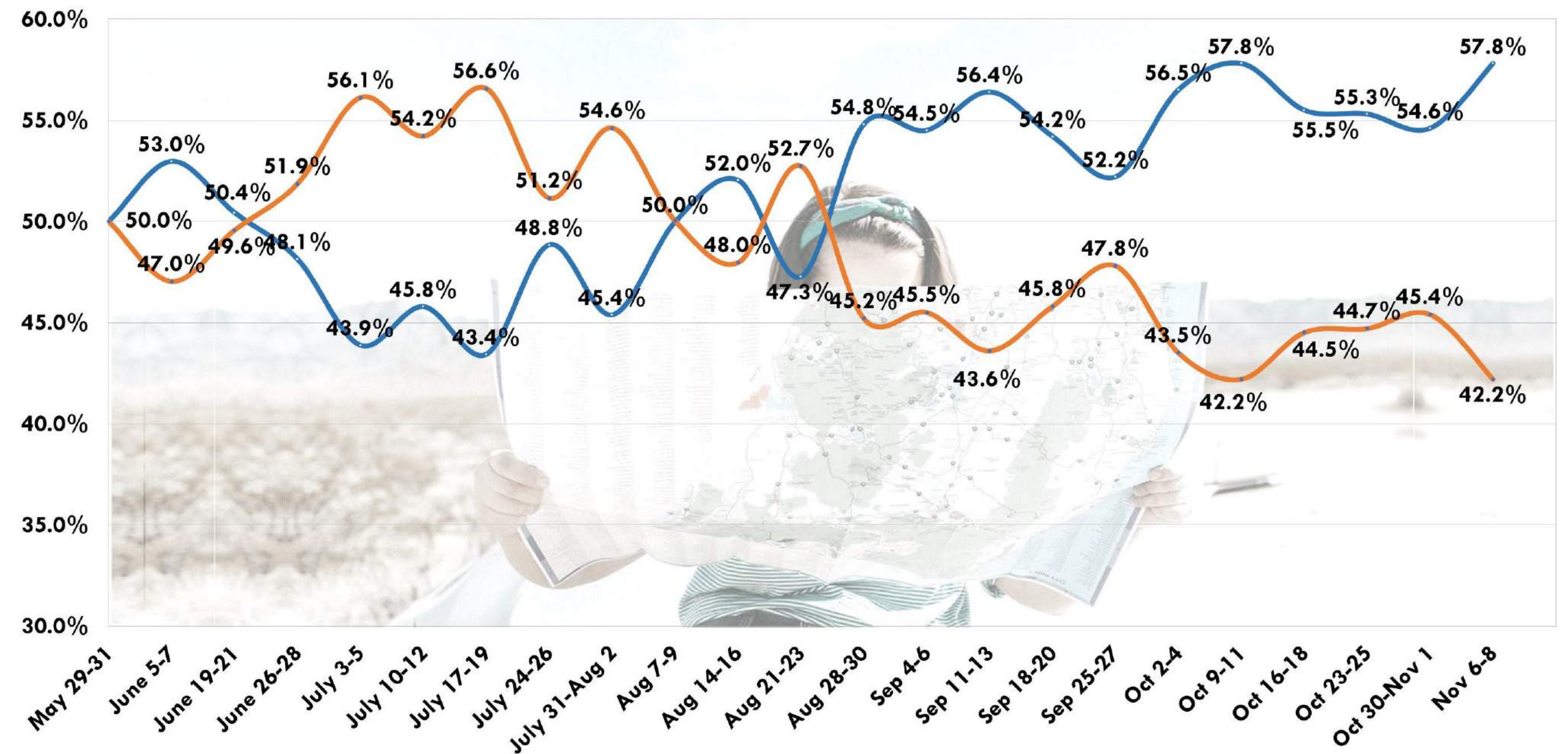
AMERICANS' TRAVEL STATE-OF-MIND MAY 29 – NOVEMBER 8



READY TO TRAVEL



NOT READY TO TRAVEL



Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (select one)

(Base: Waves 12-13 and 15-35. All respondents, 1,257, 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 and 1,205 completed surveys.)

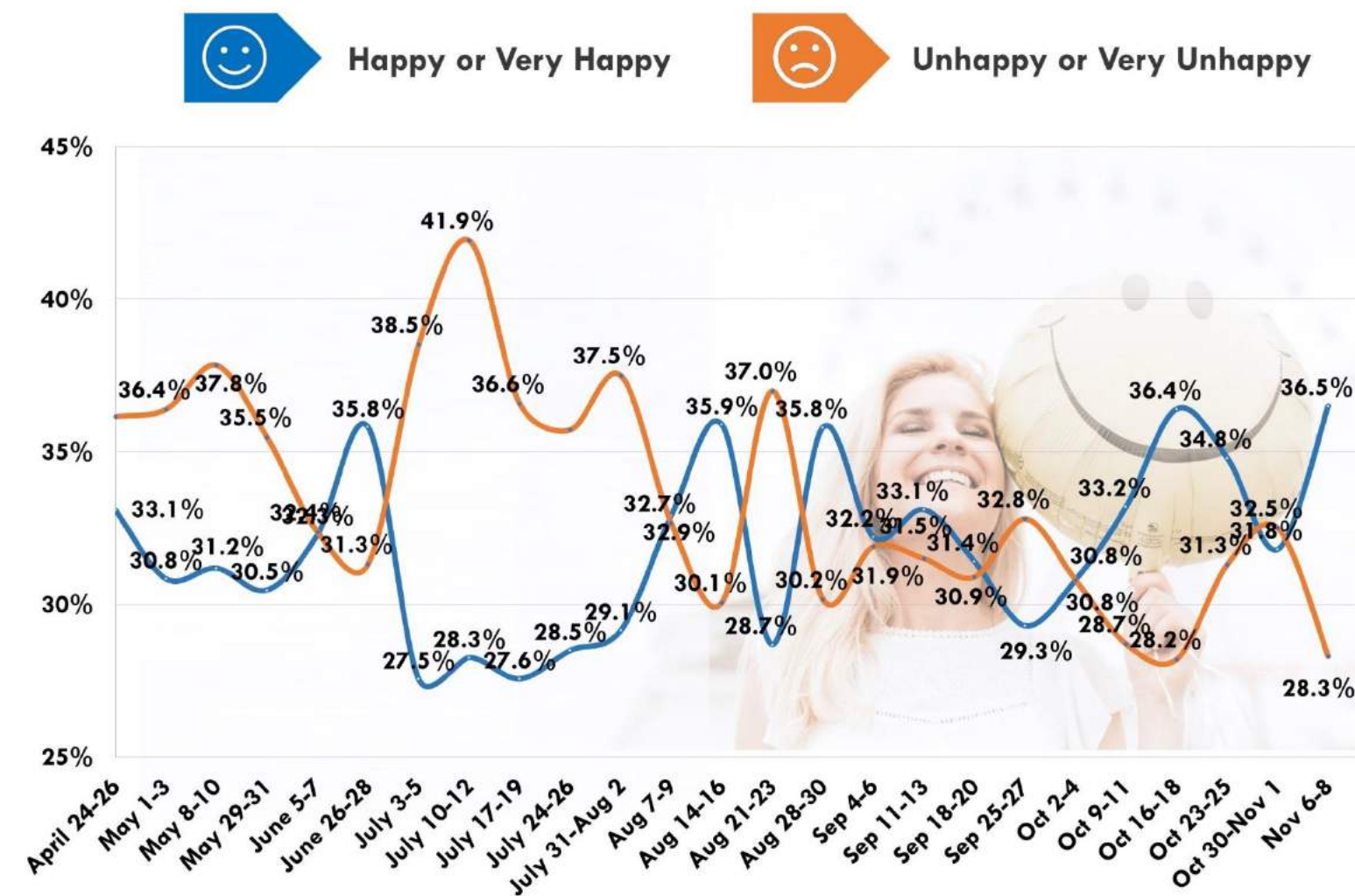
Advertising Travel in the Pandemic

With their desire for travel inspiration returning and their comfort going out for leisure in their own communities growing, now 36.5% of American travelers say they would be happy—or very happy—to see an ad promoting tourism to the place where they live. This exceeds the percent that would be unhappy by over 8%, and represents a pandemic-period record high.

However, given the vast majority of Americans who have high degrees of concern about personally or friends/family contracting coronavirus, their desire to see people wearing masks in travel ads has remained strong. When asked how they would advise advertising agencies about the use of masks in travel advertisements, nearly half said everyone in the ad should wear a mask. Another quarter says it depends, but people should be wearing them when appropriate. Just 14.5% advised that no one should wear masks in travel ads.

ADVERTISING TRAVEL IN THE PANDEMIC

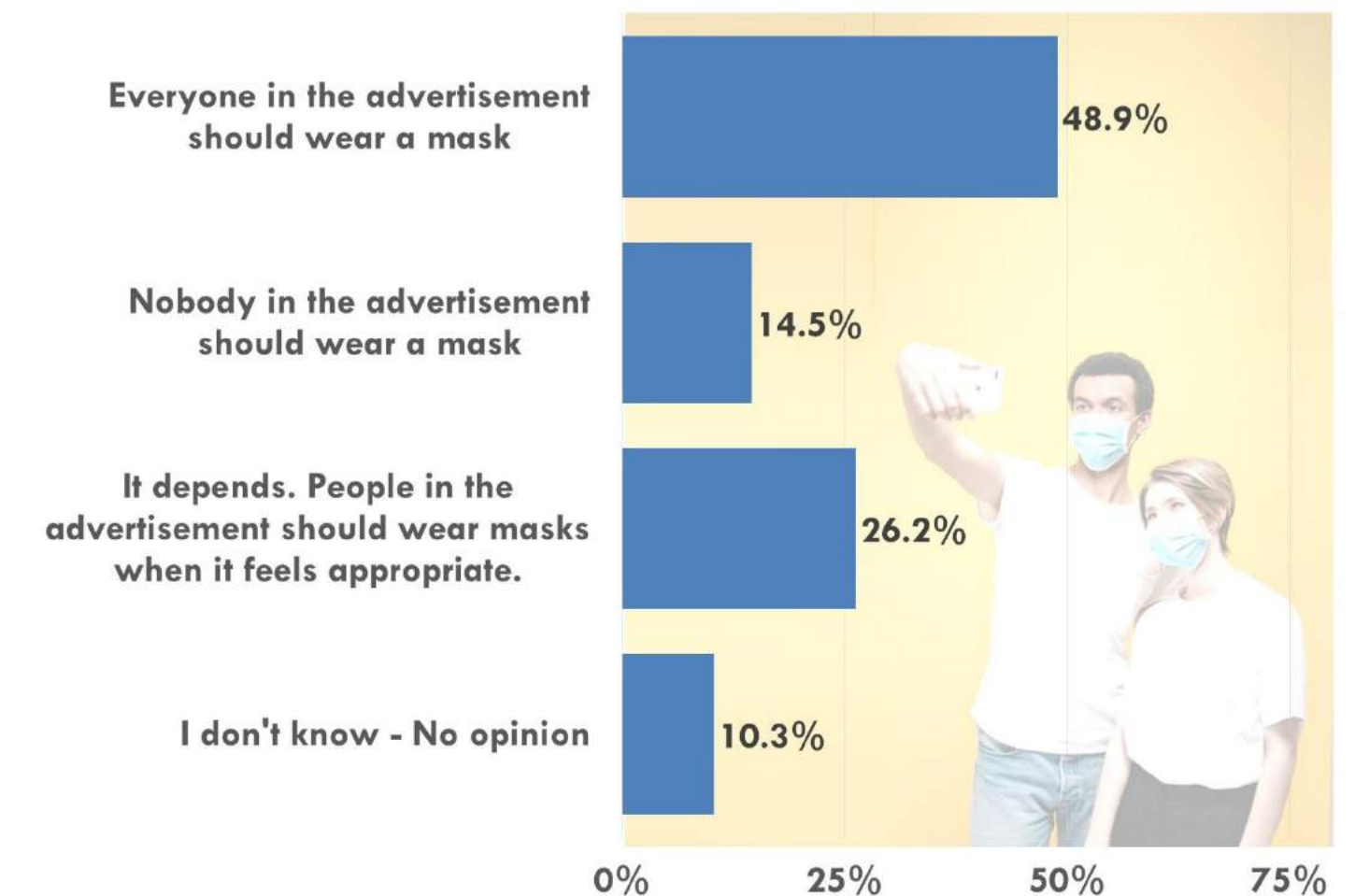
FEELINGS SEEING AN AD PROMOTING TOURISM TO OWN COMMUNITY OF RESIDENCE APRIL – NOVEMBER



Question: How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

(Base: Waves 7-9, 12-13 and 16-35. All respondents, 1,198, 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203 and 1,205 completed surveys.)

AMERICAN TRAVELERS ADVICE ABOUT MASKS IN ADS AS OF NOVEMBER 8TH



Question: Suppose you were giving advice to an advertising agency regarding the use of masks in one of its travel advertisements. Which best describes the advice you would give?

(Base: Wave 35. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

Effects of Recent Coronavirus Surges

Given the pandemic's heavy influence on travel sentiment and behavior, the current surge is not without its impact. The percent with high degrees of concern about the virus' impact on their personal finances and the greater economy increased this week. And the surge looks like it has diminished the potential volume of travel that could have occurred. Looking at the percent of Americans who have traveled since the onset of the pandemic in March, it appears that still only around half are traveling. **Now 60.2% say that the recent increases in COVID-19 cases around the country have made them less likely to travel in the next three months. Unfortunately, 41.8% report that they have cancelled or postponed an upcoming leisure trip because of the worsening of the pandemic in the U.S.**

EFFECTS OF RECENT CORONAVIRUS SURGES AS OF NOVEMBER 8TH

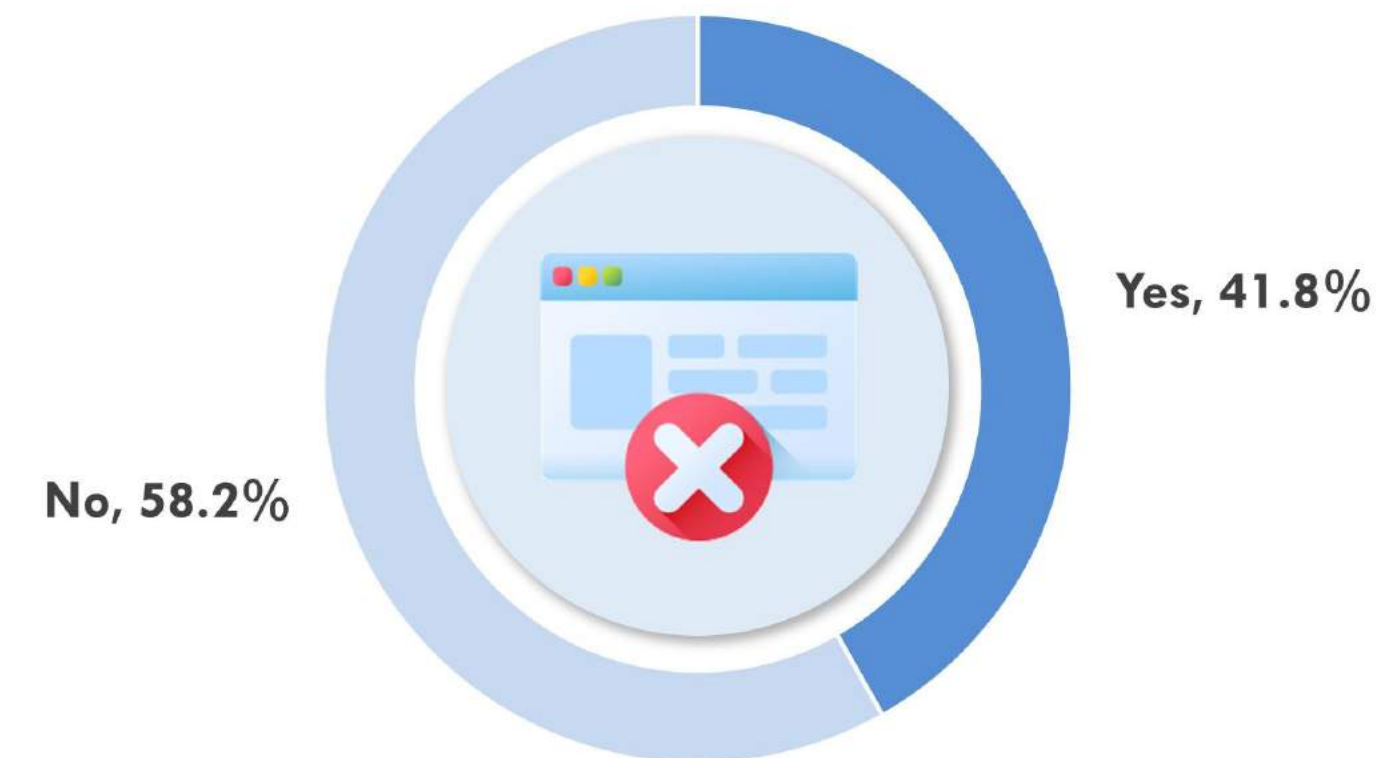
LESS LIKELY TO TRAVEL IN NEXT THREE MONTHS



Question: Have recent increases in COVID-19 cases around the country made you less likely to travel in the next three (3) months?

(Base: Waves 35 data. All respondents, 1,200 completed surveys. Data collected Nov 6-8, 2020)

CANCELLED OR POSTPONED TRIPS BECAUSE OF RECENT SURGE



Question: Have you cancelled or postponed any upcoming leisure trips because of the recent increases in COVID-19 cases seen around the United States?

(Base: Waves 35 data. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

What's Needed to Return to Normal (April vs. November)

WHAT'S NEEDED TO RETURN TO NORMAL (APRIL VS NOVEMBER)

Nevertheless, eight months into the pandemic, Americans do exhibit signs of adapting towards regaining normalcy.

When asked what they need to feel comfortable going back to their normal (or near-normal) lifestyle, notably fewer need a number of circumstances to be in place compared to than in the first phase of the pandemic in April.

Question: Which of the following will you need to feel comfortable going back to your normal (or near-normal) lifestyle? (select those you feel you will need)

(Base: Waves 7 & 35 data. All respondents, 1,208 and 1,205 completed surveys. Data collected April 24-26 and November 6-8, 2020)

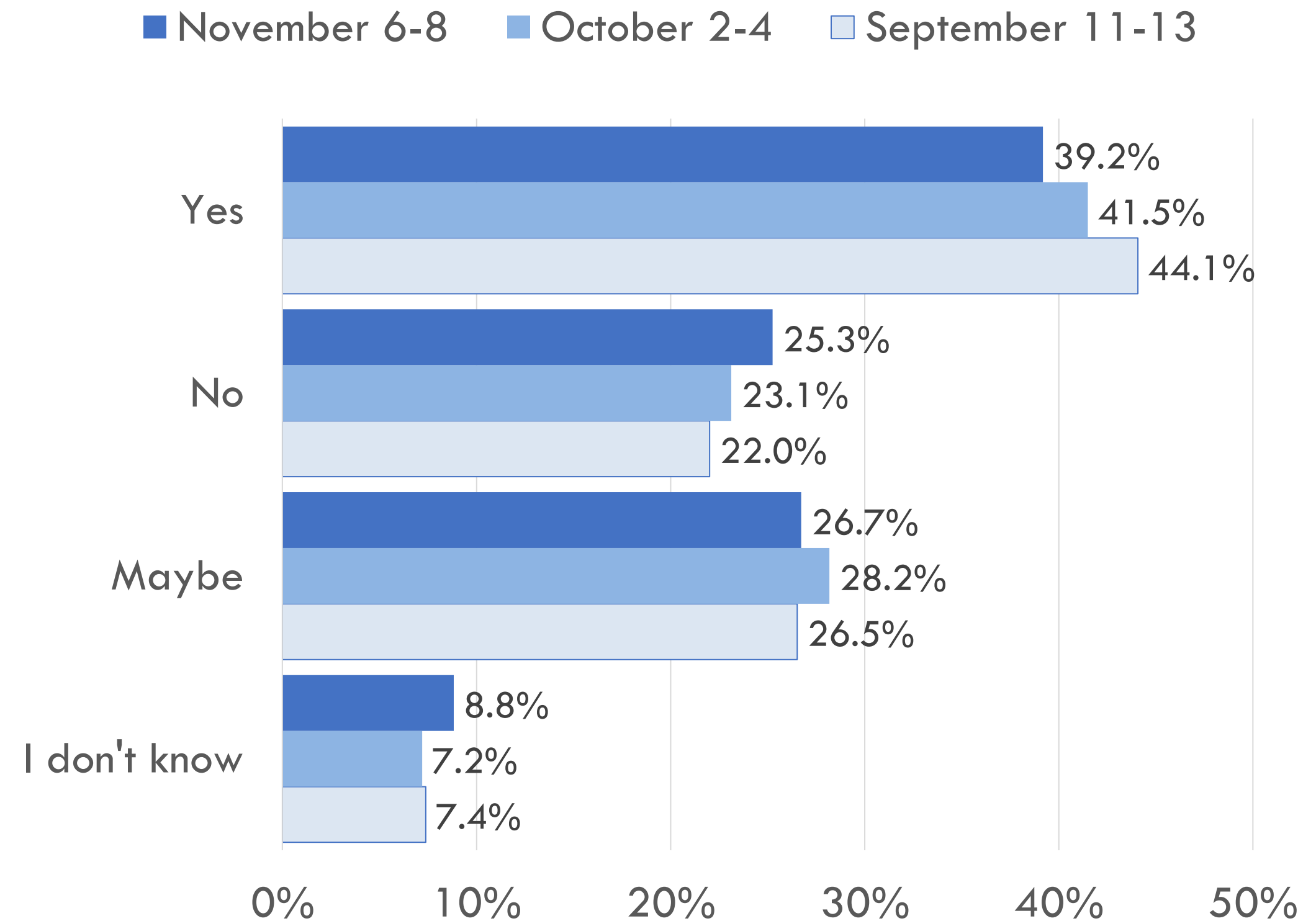


Will Travelers Take a Vaccine?

However, the one area nearly 47% of Americans have remained steadfast in needing to return to their normal lifestyle is a COVID-19 vaccine--although the percent agreeing they need a vaccine to do any travel has been on the decline for the last four weeks (38.2%).

Since September, there has been a 5% decrease in the percent that affirm they would take a vaccine that is developed this year or in early 2021 (39.2%), but the length of time Americans say they prefer to wait to take an approved vaccine has lessened, so that 30% feel they now need less than three months.

WILL TRAVELERS TAKE A VACCINE?



Question: If a COVID-19 vaccine is developed later this year (or early next year) and approved for use, would you take it? (Assume the vaccine is 75% effective and has mild to moderate side effects)

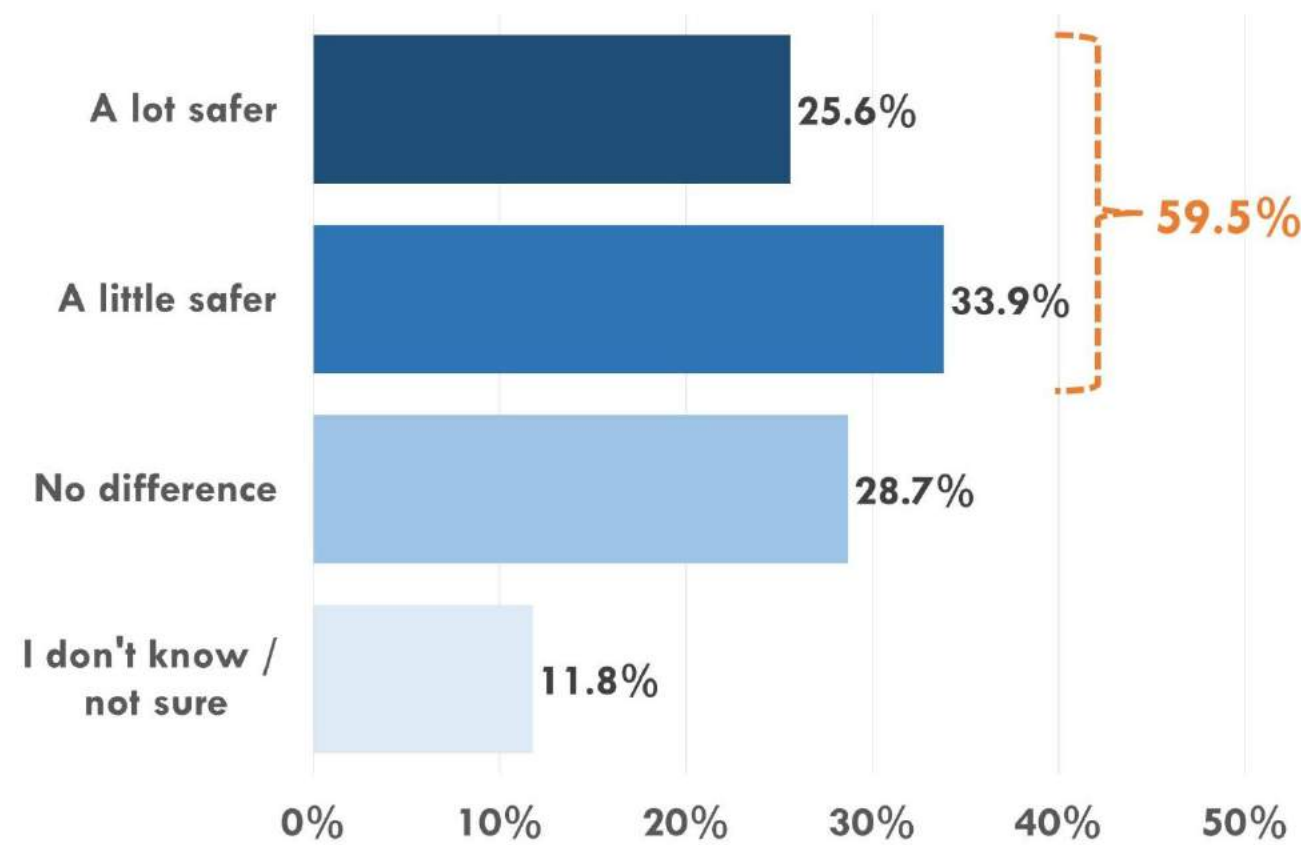
(Base: Waves 27, 30 & 35 data. All respondents, 1,205, 1,203 and 1,205 completed surveys.)

COVID-19 Vaccine's Impact on Safety Perceptions of Travel

When vaccines becomes available, they continue to be very promising in bringing a segment of travelers back and increasing travel overall. If a COVID-19 vaccine was required before traveling, nearly 60% of American travelers said this would make air travel feel safer and nearly 50% said they this would make cruise travel feel safer. In addition, 36.7% of American travelers say the availability of an official document confirming COVID-19 inoculation would make them more—or much more—likely to travel in the next 12 months.

COVID-19 VACCINE'S IMPACT ON SAFETY PERCEPTIONS OF TRAVEL

FEELINGS ABOUT VACCINE REQUIREMENTS FOR AIR TRAVEL

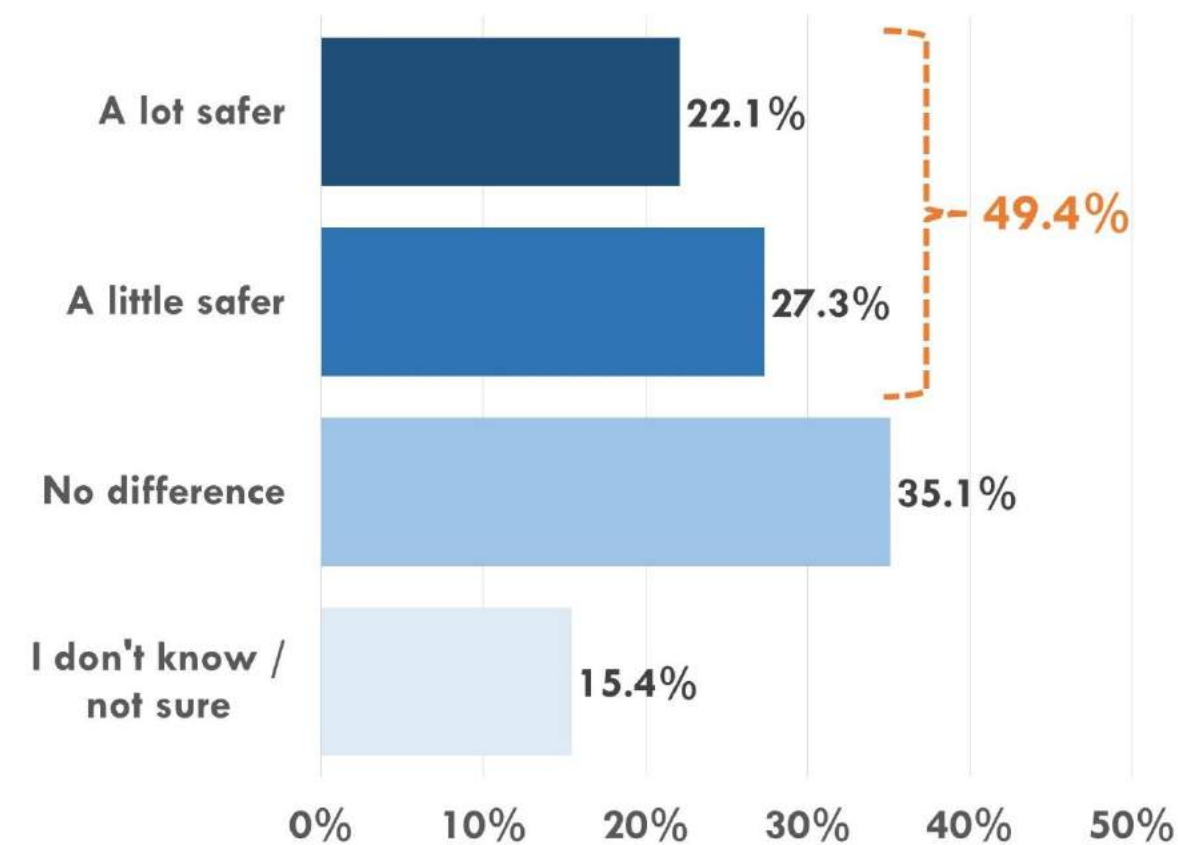


Question: If a commercial airline required passengers to get the COVID-19 vaccine before traveling, how would that affect your view of the safety of traveling on that airline? (select one)

It would make me feel _____.

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

FEELINGS ABOUT VACCINE REQUIREMENTS FOR CRUISE TRAVEL



Question: If a cruise line required passengers to get the COVID-19 vaccine before traveling, how would that affect your view of the safety of traveling on that cruise line? (select one)

It would make me feel _____.

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

OFFICIAL TRAVEL DOCUMENT SHOWING PROOF OF COVID-19 VACCINE



OF AMERICAN TRAVELERS SAY SUCH A DOCUMENT WOULD MAKE THEM MORE—OR MUCH MORE—LIKELY TO TRAVEL IN THE NEXT 12 MONTHS

Question: If a travel document showing proof of COVID-19 vaccination were available for you, how would this affect your likelihood to travel in the next twelve (12) months?

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected Nov 6-8, 2020)

Necessary COVID-19 Safety Protocols Desired for Live Event Attendance

Prior to the pandemic, nearly one-third of American travelers took trips specifically to attend a special event or festival, and these travelers are likely hoping for the return/recovery of these live events.

When asked about the COVID-related protocols they feel are absolutely necessary to feel comfortable attending such events, desires are similar to retail businesses, in that they want masking, frequent cleaning and limited crowd sizes to ensure social distancing is possible.

Question: Which of the following would be absolutely necessary for you to feel comfortable attending a festival or special event? (select all that apply)

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected November 6-8, 2020)

NECESSARY COVID-19 SAFETY PROTOCOLS DESIRED FOR LIVE EVENT ATTENDANCE AS OF NOVEMBER 8TH



REQUIRED FACE MASKS FOR STAFF
(48.9%)



REQUIRED FACE MASKS FOR ALL ATTENDEES
(48.8%)



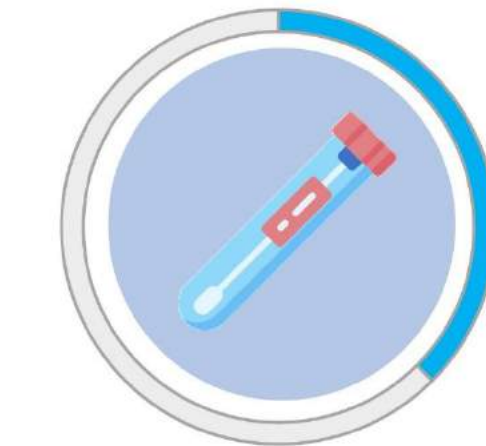
FREQUENT CLEANING & DISINFECTION OF SURFACES
(45.2%)



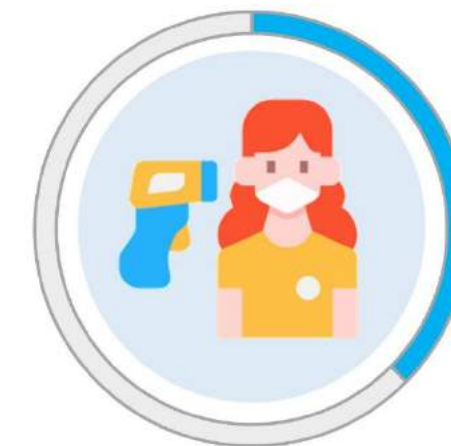
LIMITED NUMBER OF ATTENDEES ALLOWED
(44.8%)



STRICTLY ENFORCED SOCIAL DISTANCING
(42.8%)



COVID-19 TESTING FOR EVENT STAFF
(37.5%)



TEMPERATURE CHECKS WHEN ENTERING THE EVENT
(37.4%)



CONTACTLESS TICKETING/ENTRANCE
(29.7%)



PLASTIC BARRIERS AT PURCHASE POINTS
(26.1%)

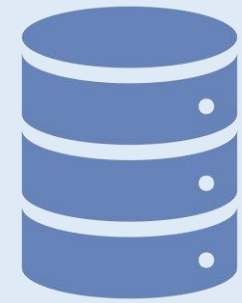


Coronavirus Travel Sentiment Index

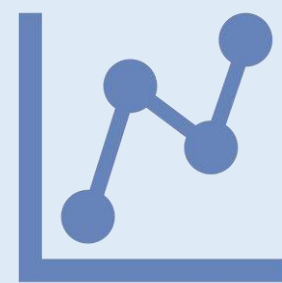
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of November 9th

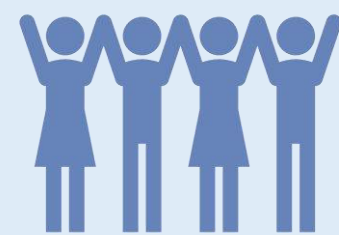
What is a Predictive Index?



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



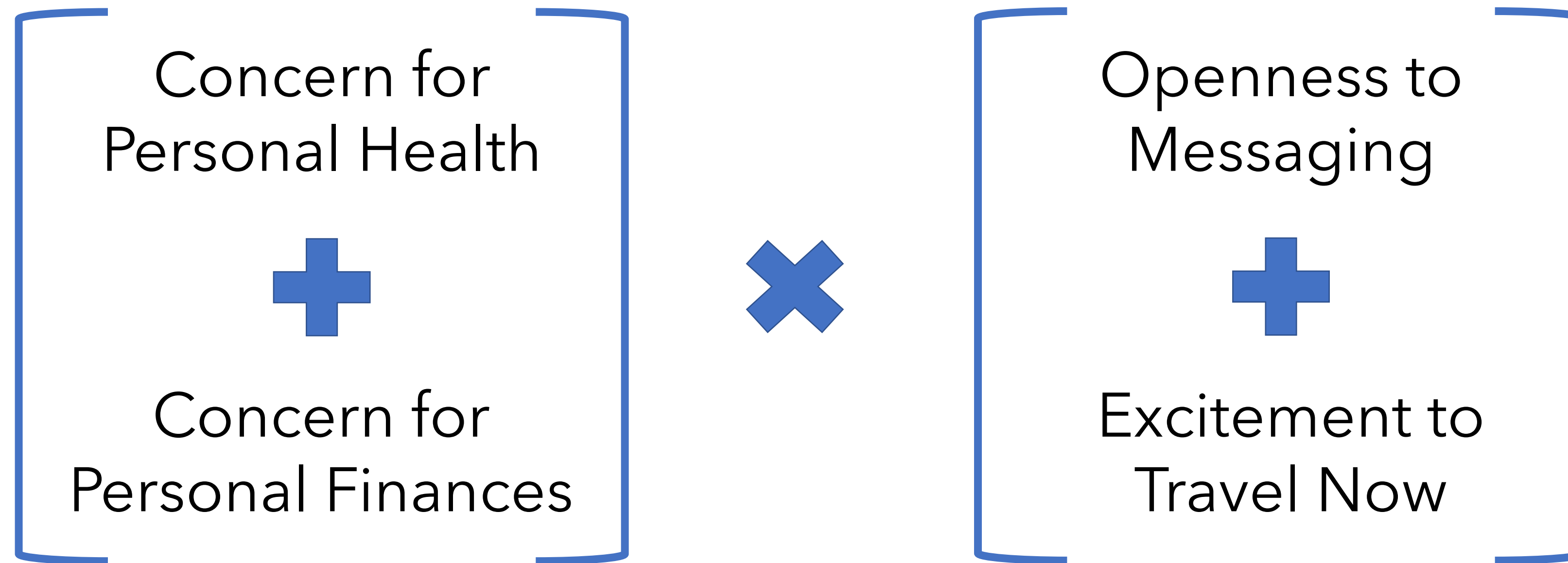
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

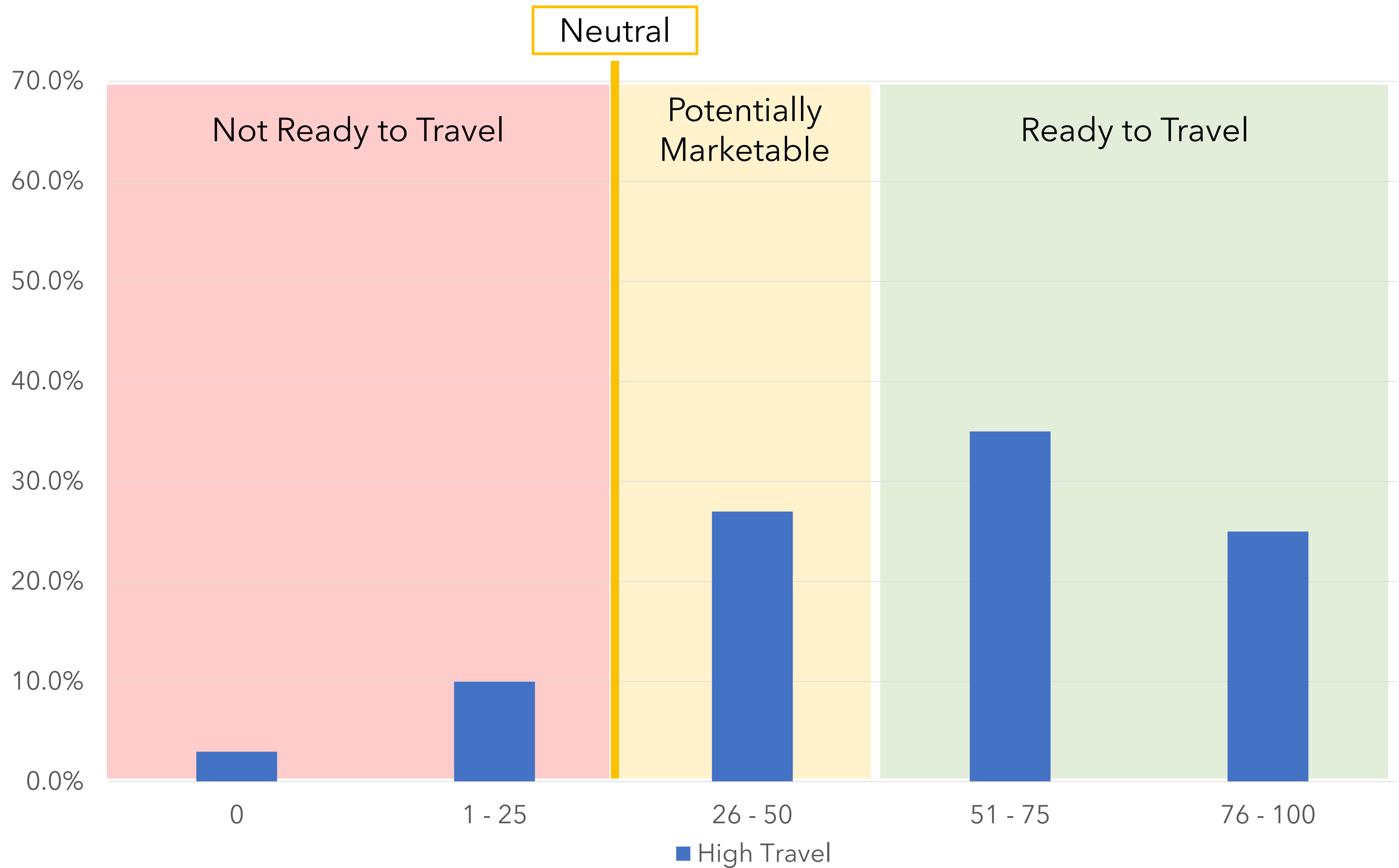
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



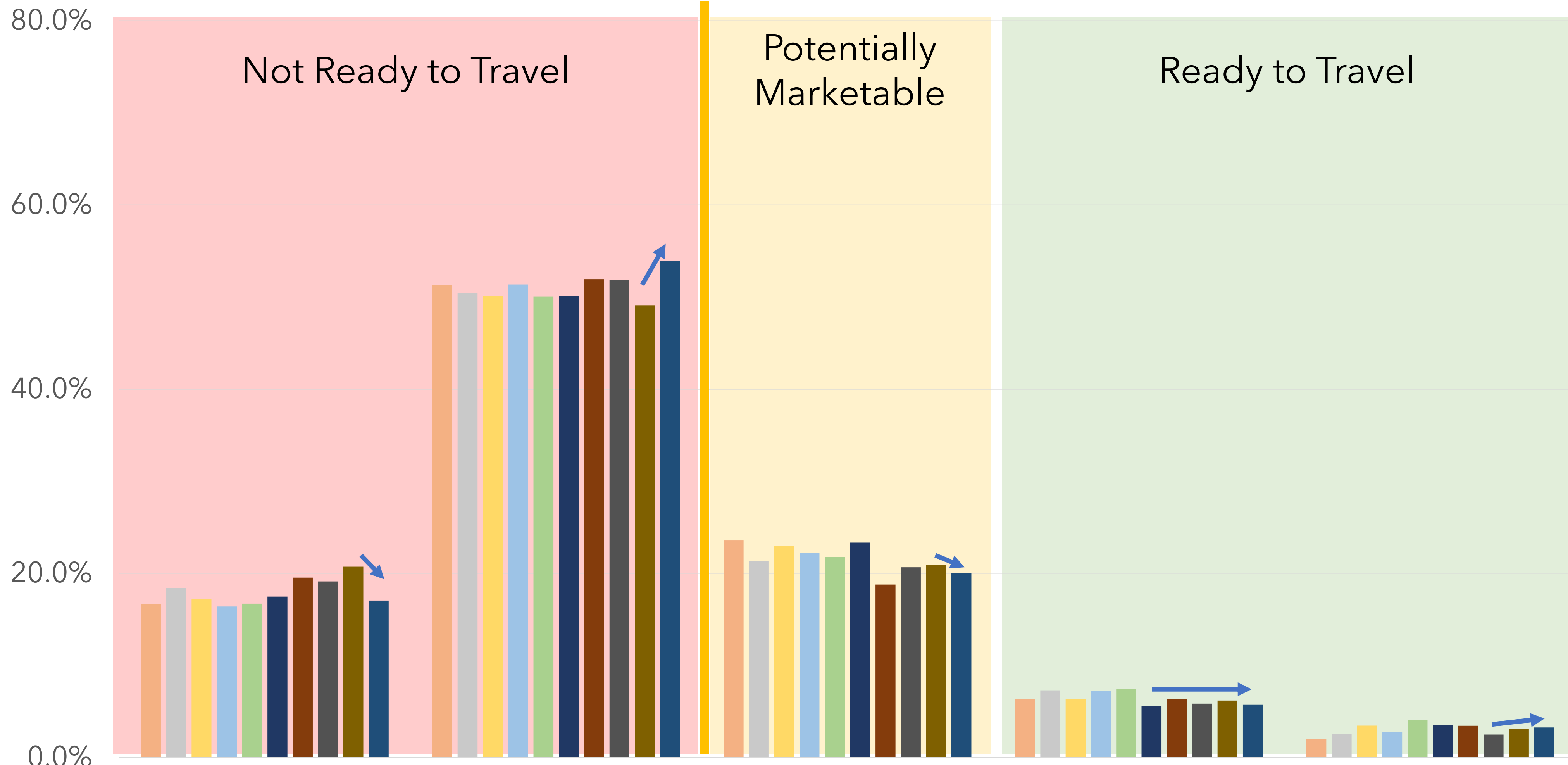
*Normalized to a 100pt scale

Healthy Travel Outlook

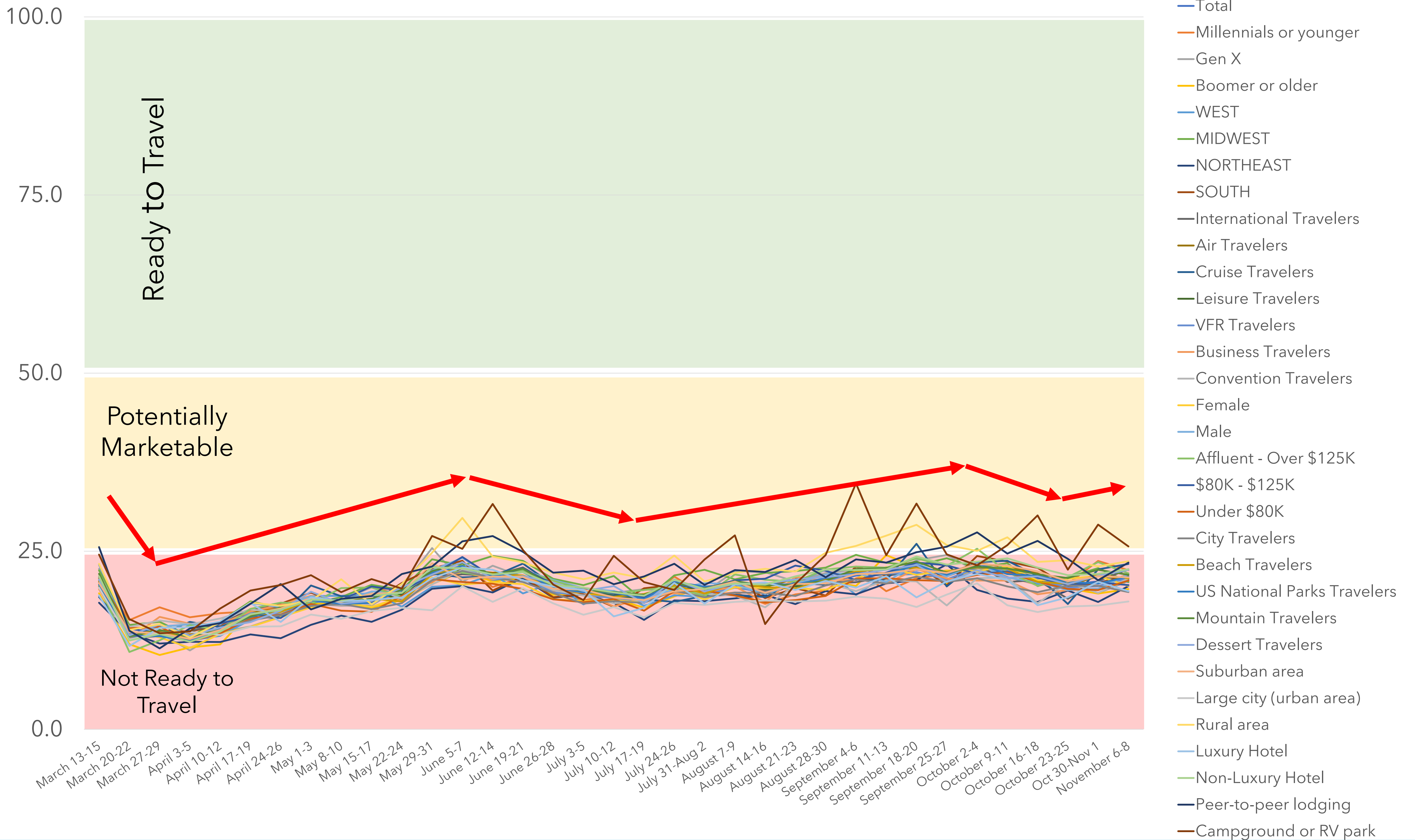


Travel Outlook

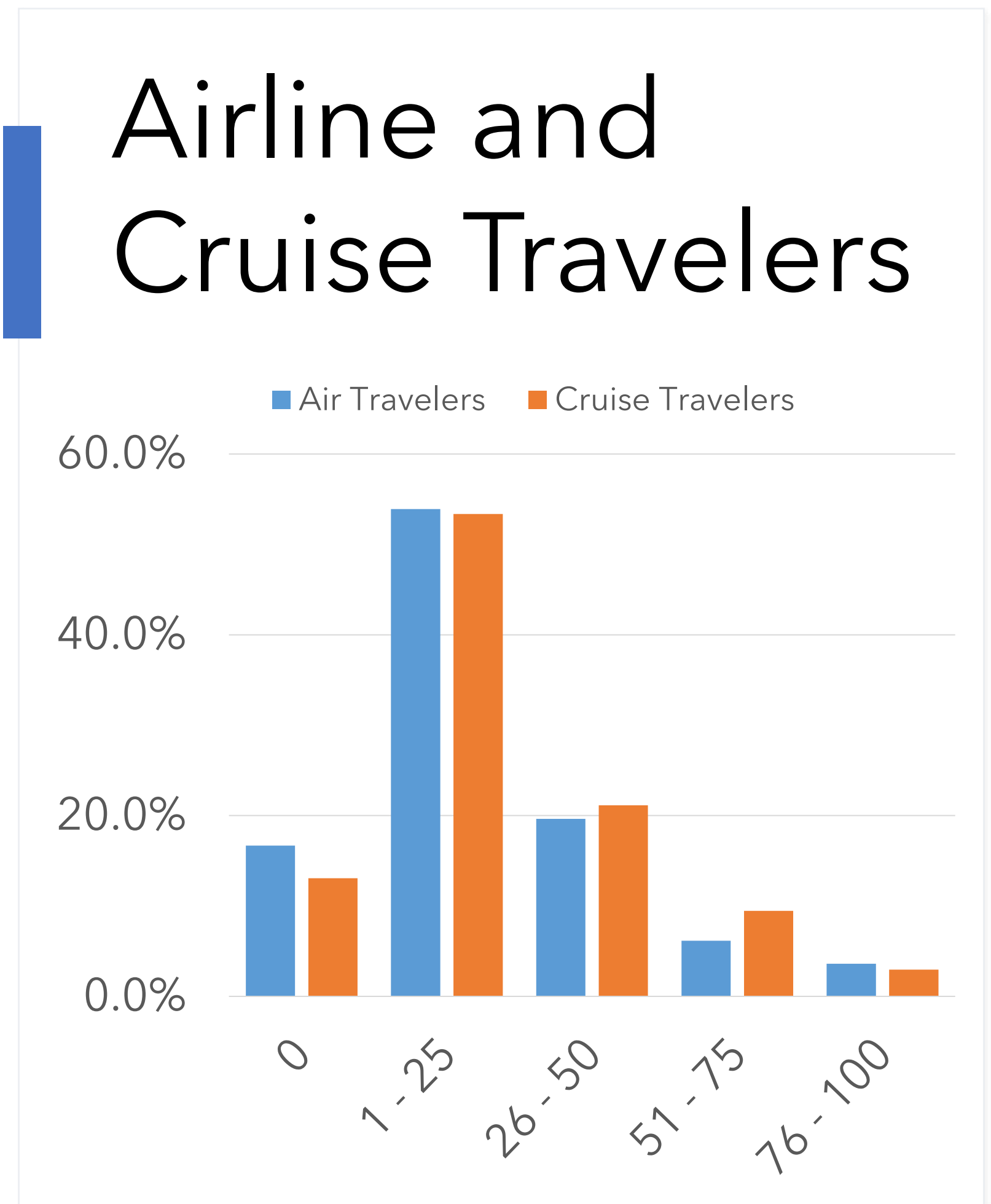
Neutral



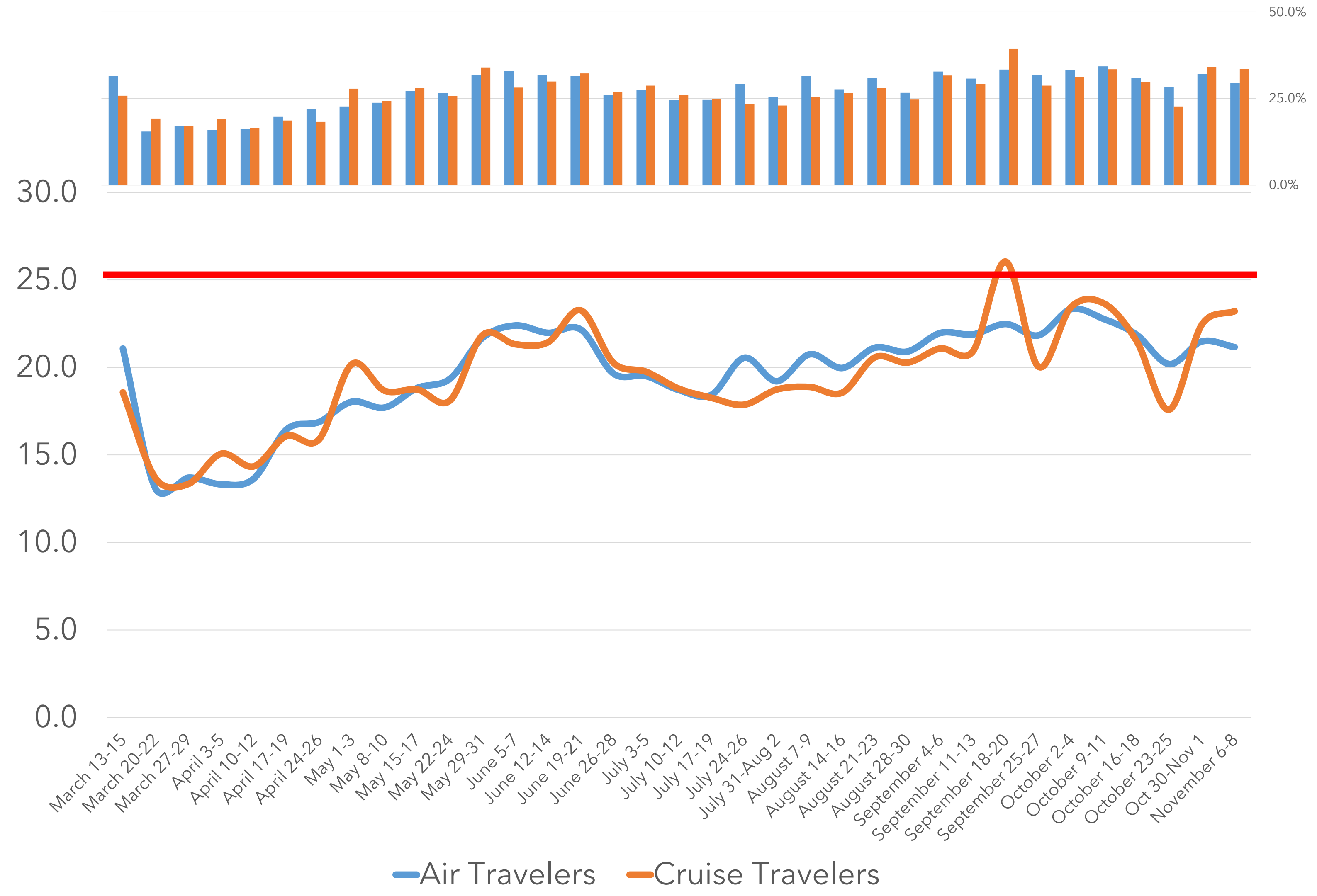
- September 4-6
- September 11-13
- September 18-20
- September 25-27
- October 2-4
- October 9-11
- October 16-18
- October 23-25
- Oct 30-Nov 1
- November 6-8



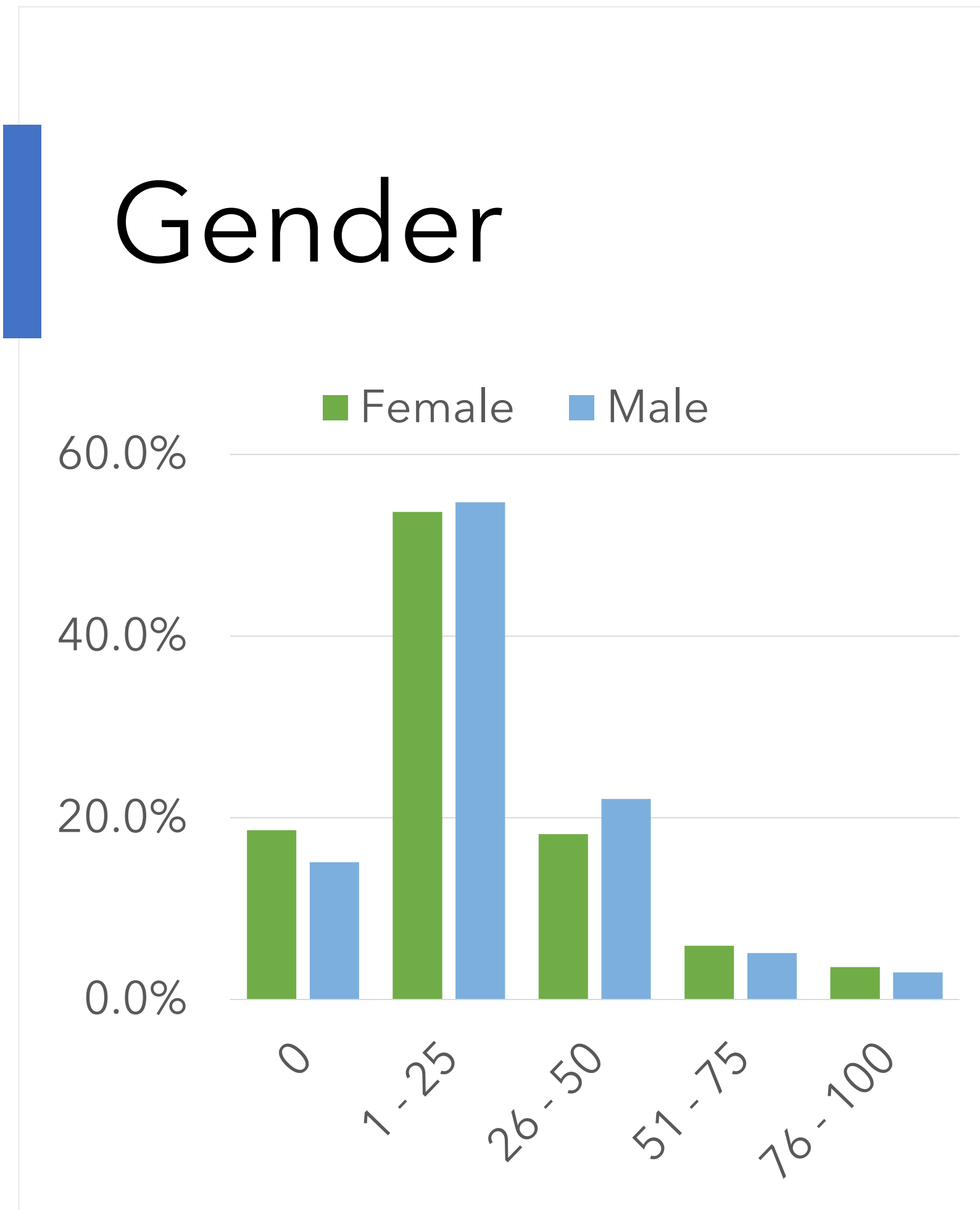
Airline and Cruise Travelers



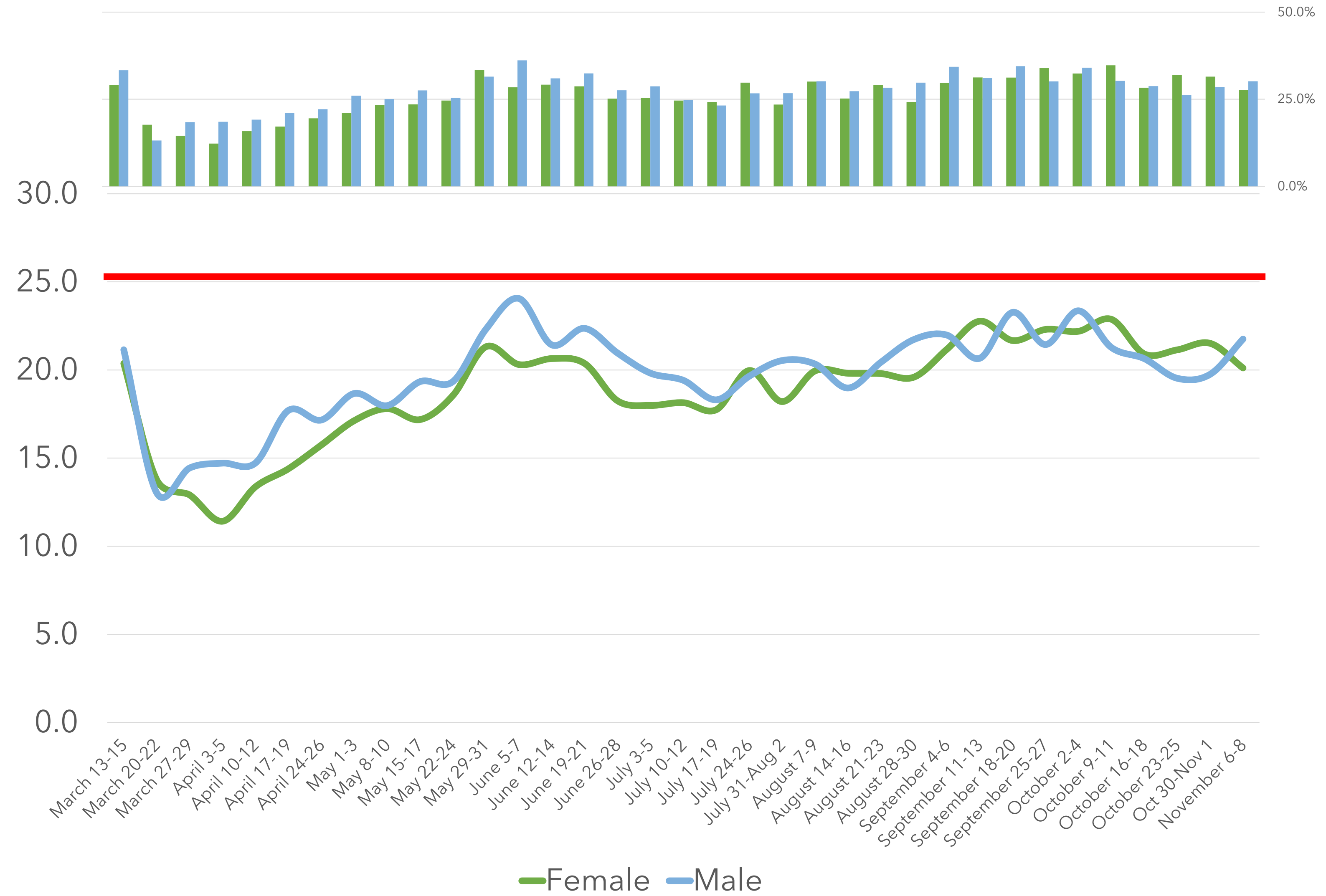
Percent Potentially Marketable (Index Above 25)



Gender

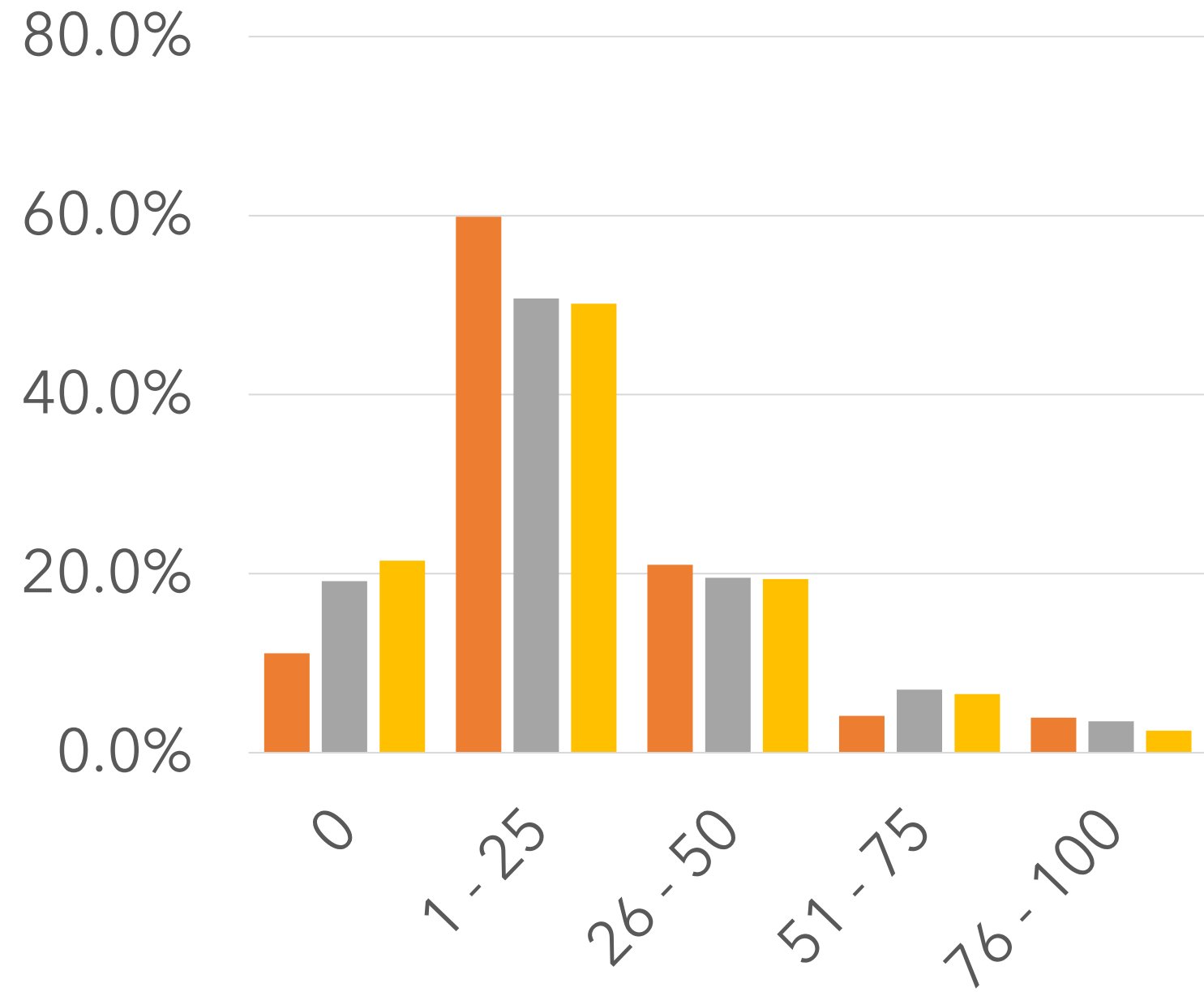


Percent Potentially Marketable (Index Above 25)

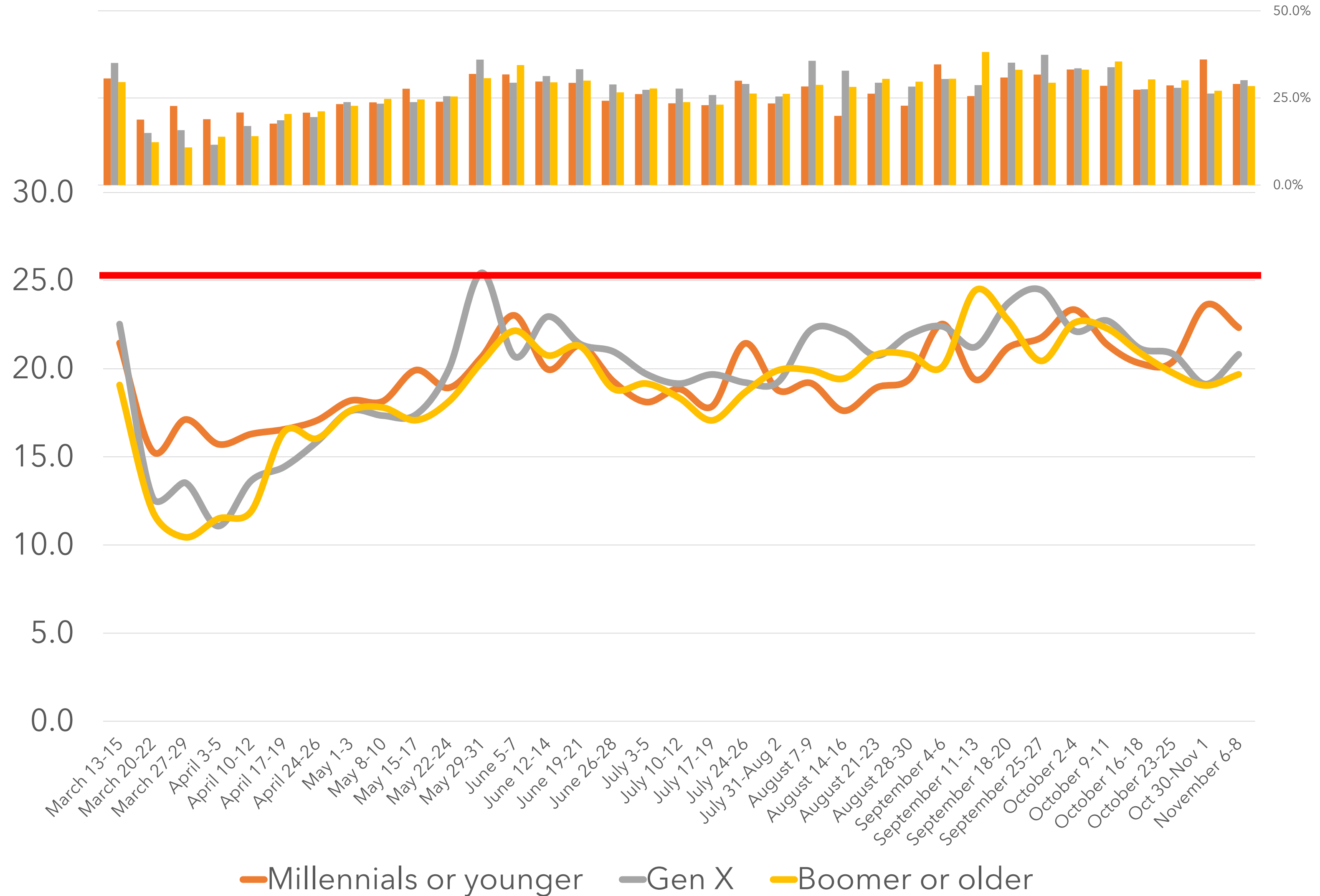


Generation

■ Millennials or younger
 ■ Gen X
 ■ Boomer or older

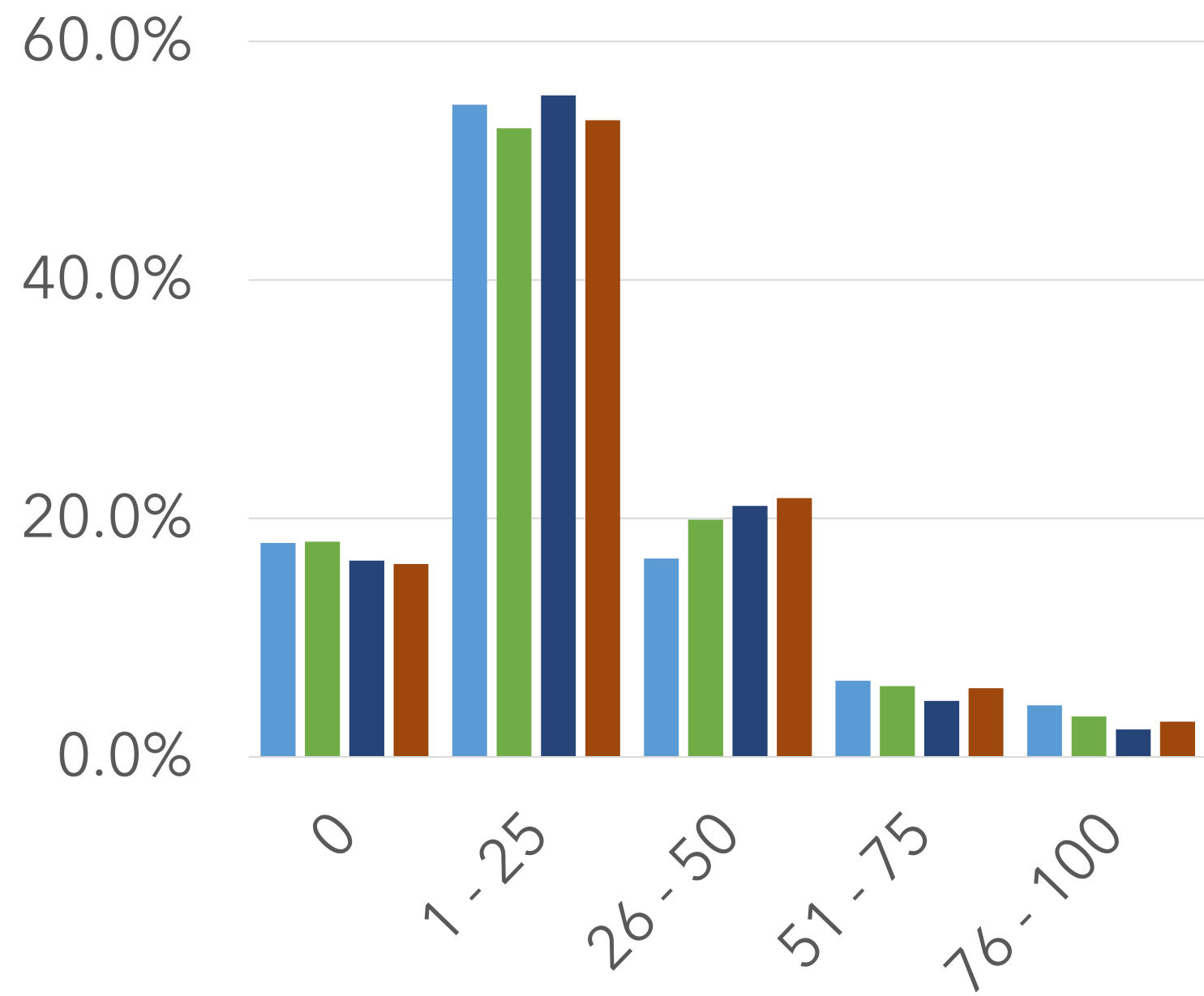


Percent Potentially Marketable (Index Above 25)

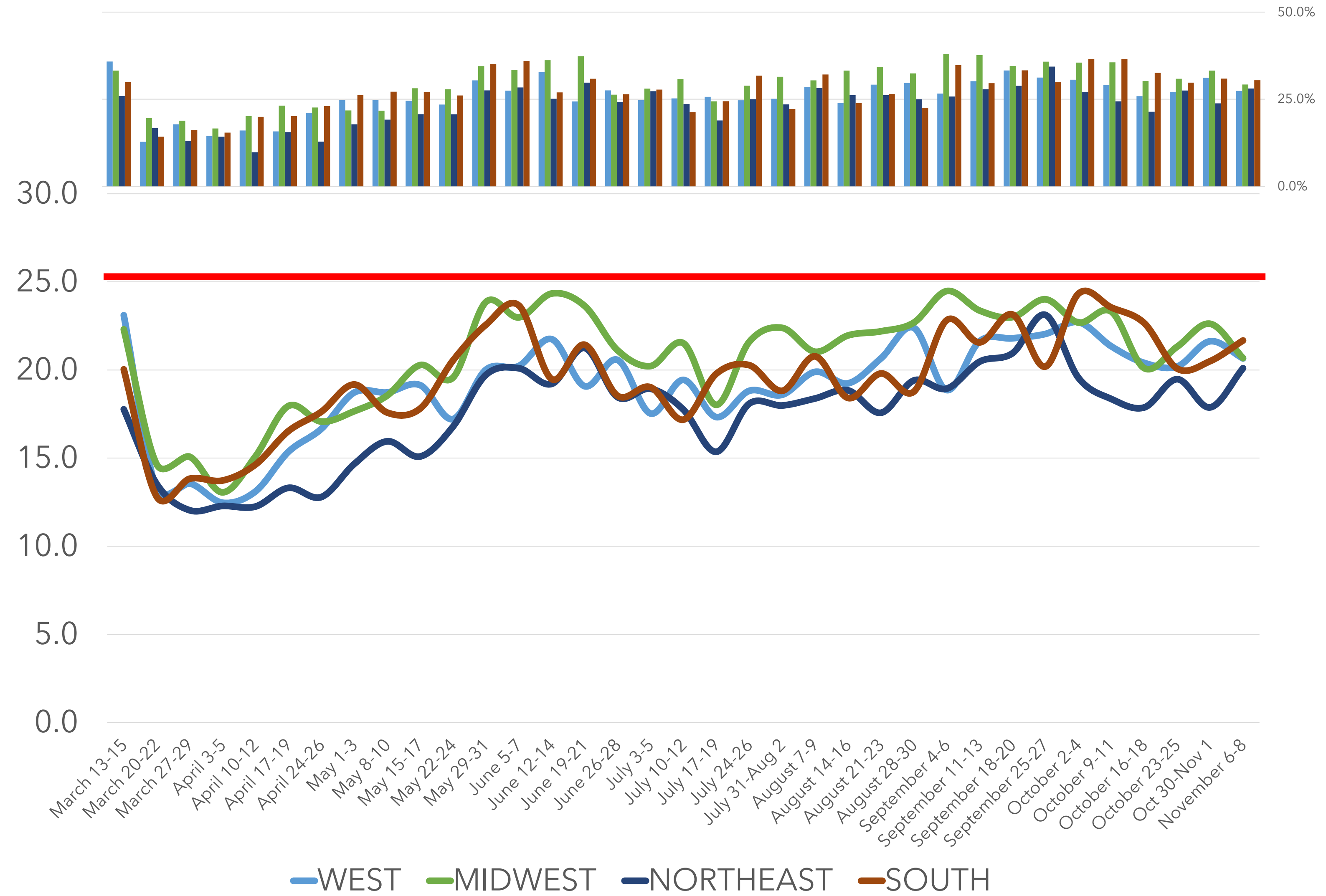


US Regions

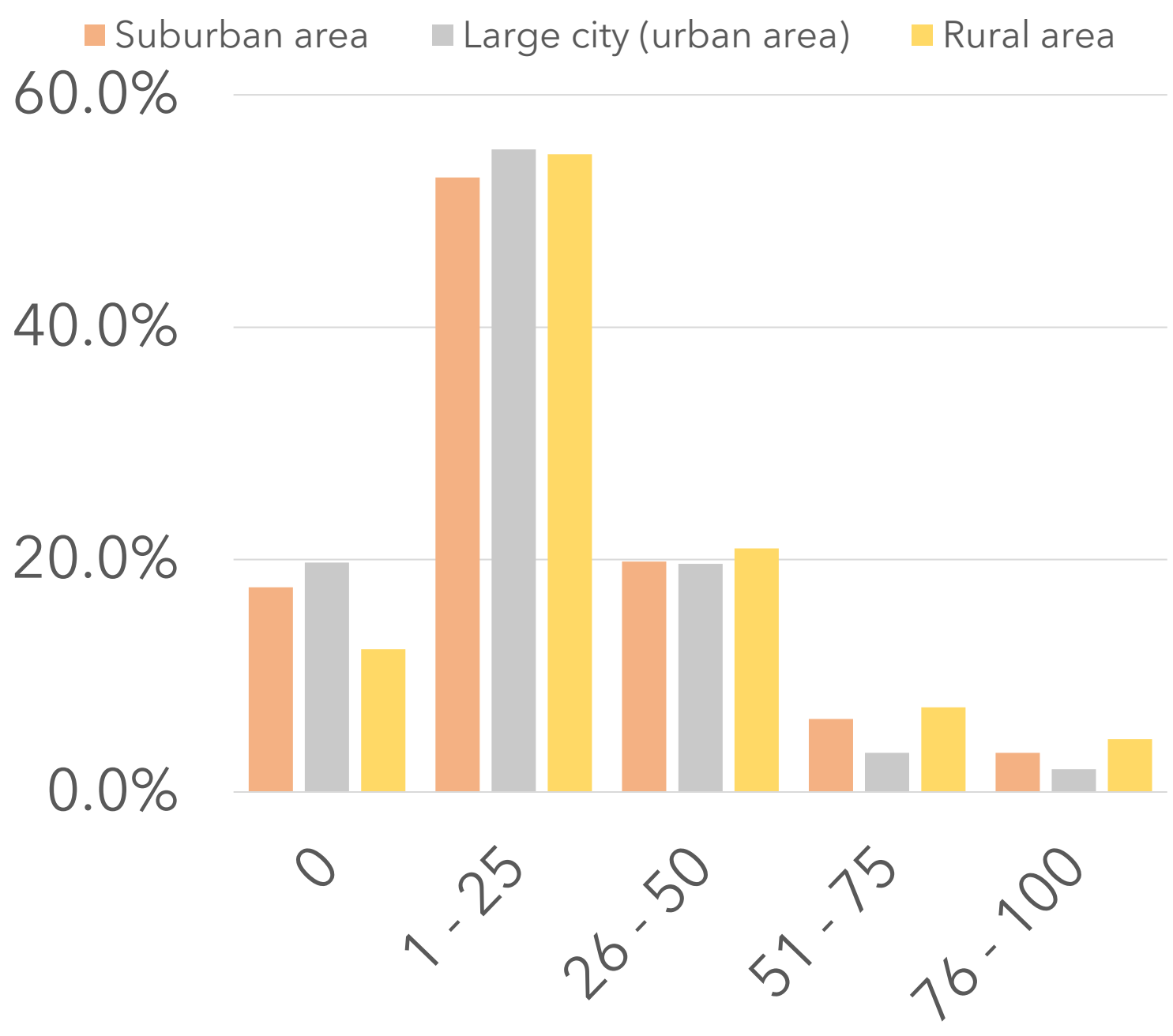
WEST MIDWEST NORTHEAST SOUTH



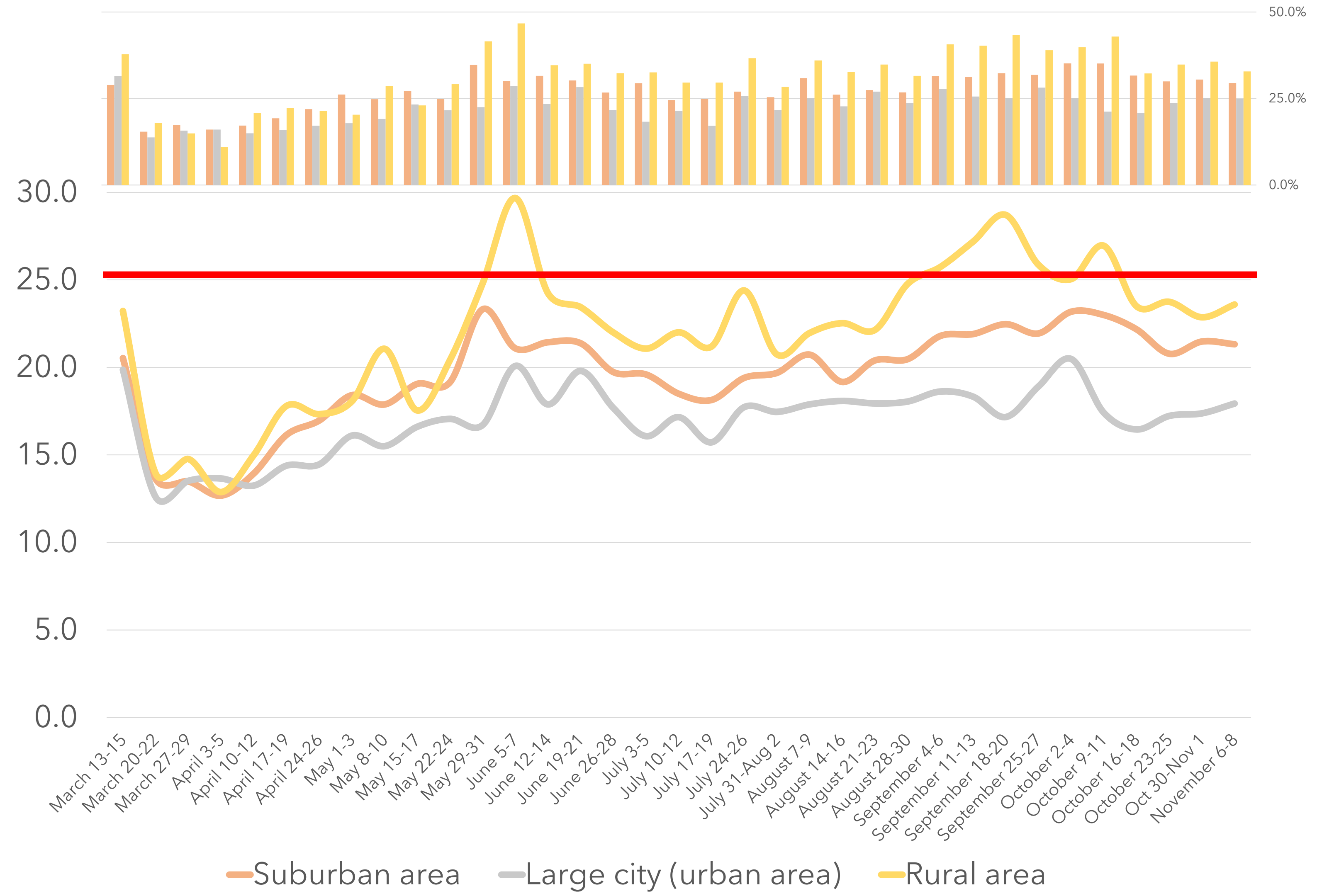
Percent Potentially Marketable (Index Above 25)



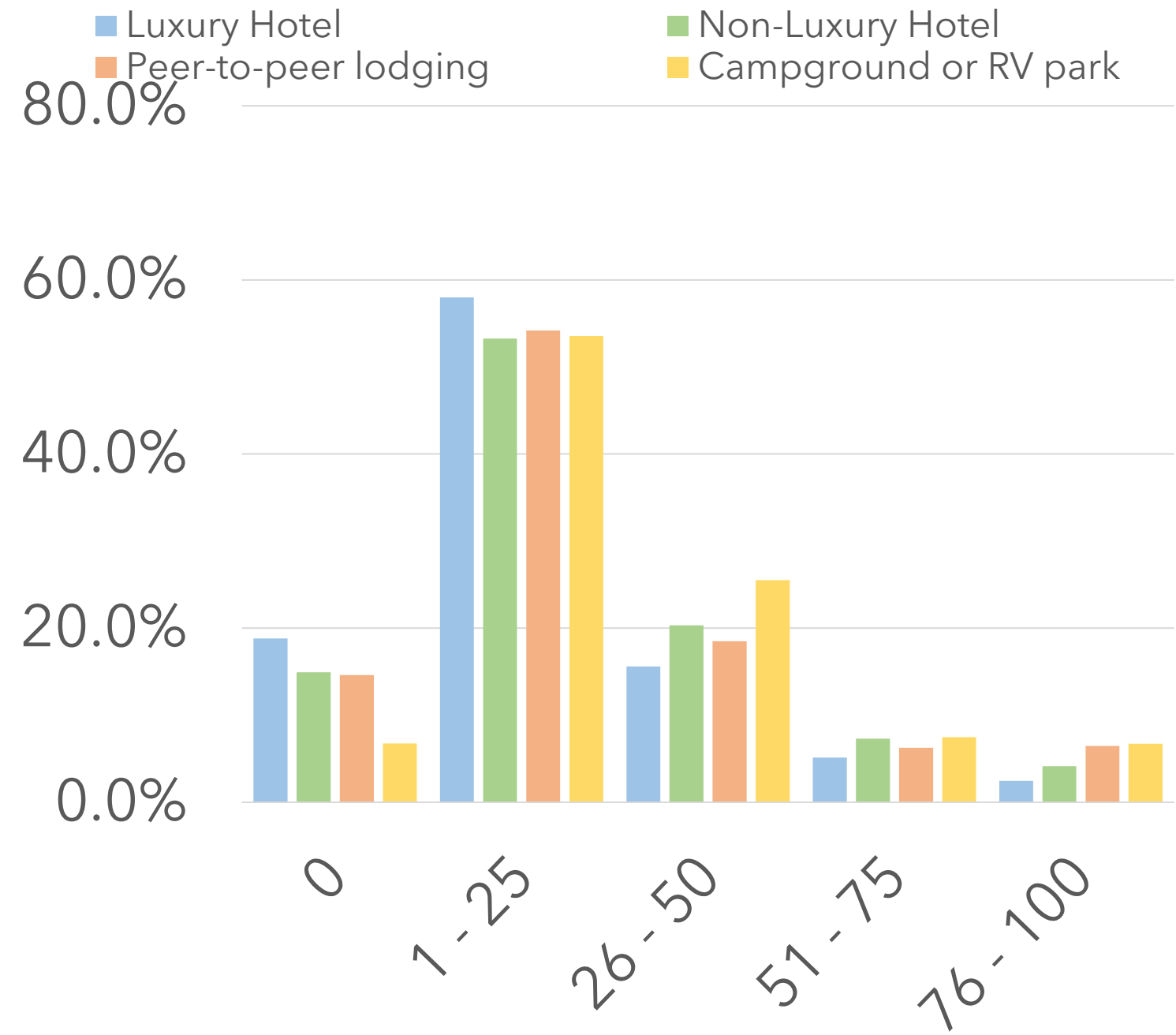
Residence Type



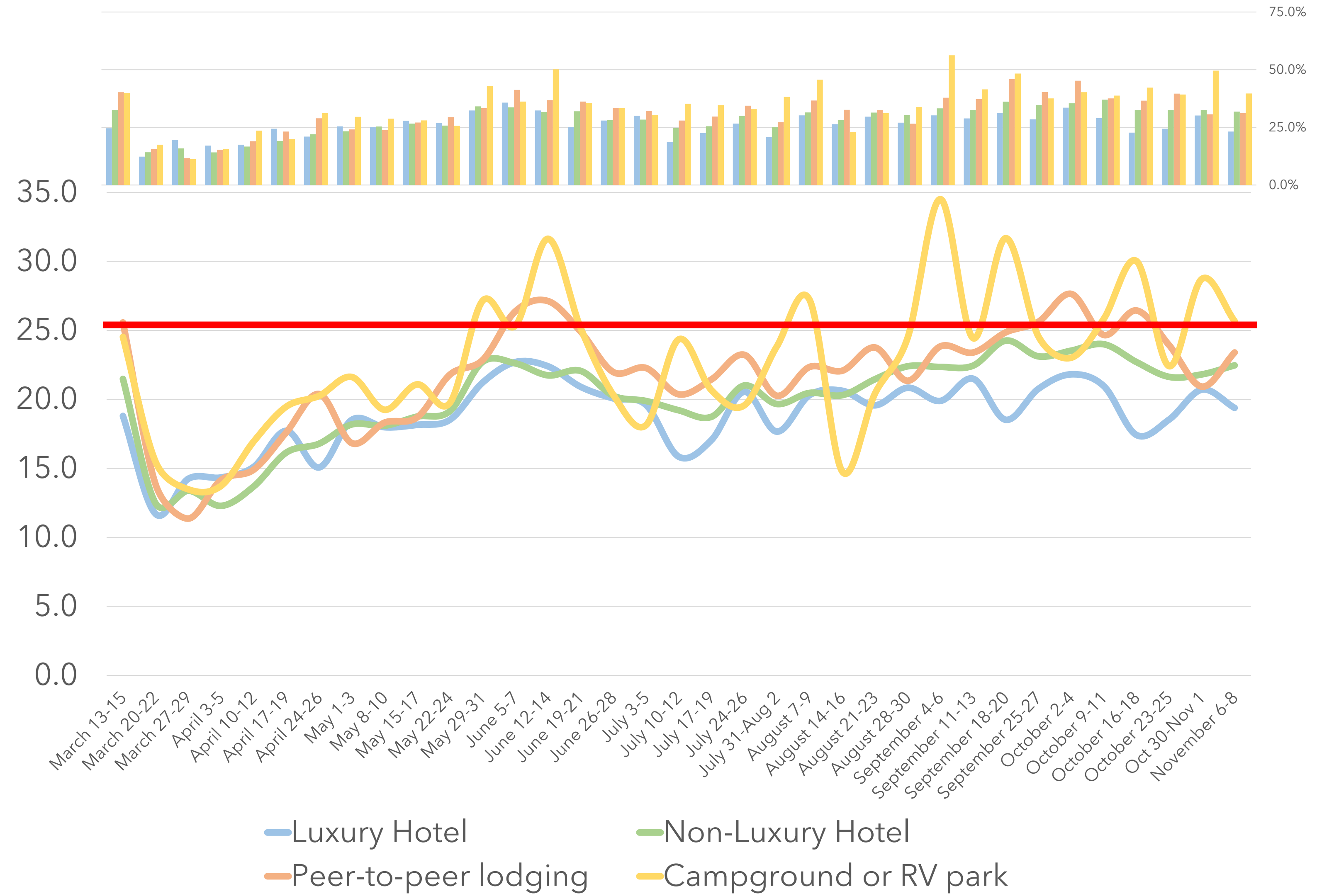
Percent Potentially Marketable (Index Above 25)



Lodging Preference



Percent Potentially Marketable (Index Above 25)





Questions?
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Information?

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

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We Can Help You

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Visitor Activity Analysis & Segmentation

Persona Research

Online Focus Groups

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