

CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 43

RESEARCH FINDINGS

January 4, 2021

Destination  Analysts



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Destination  Analysts

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PROJECT OVERVIEW

The goal of this research is to understand and track the widespread disruption and damage to the travel and tourism industry caused by the coronavirus. To do so, Destination Analysts, Inc. has launched a weekly tracking survey of adult American travelers. The results of the 43rd wave of this project are presented in this report. The survey is being conducted weekly to track traveler sentiment and generate insight into when tourism businesses can expect demand to return.

The survey questionnaire used here is multifaceted and asks a representative sample of adult American travelers to report their experiences and feelings around the current pandemic situation. We expect the value of this survey to increase as additional waves of the project are completed and we can see emerging trends. For now, we present this data primarily on topline with our additional observations included.

The 43rd wave of this survey was collected from January 1st – 3rd, from a demographically representative sample of adult American travelers in each of four U.S. regions. Travelers are defined as adults having taken at least one trip (50-miles or more from home) in the past two years. In total, 1,206 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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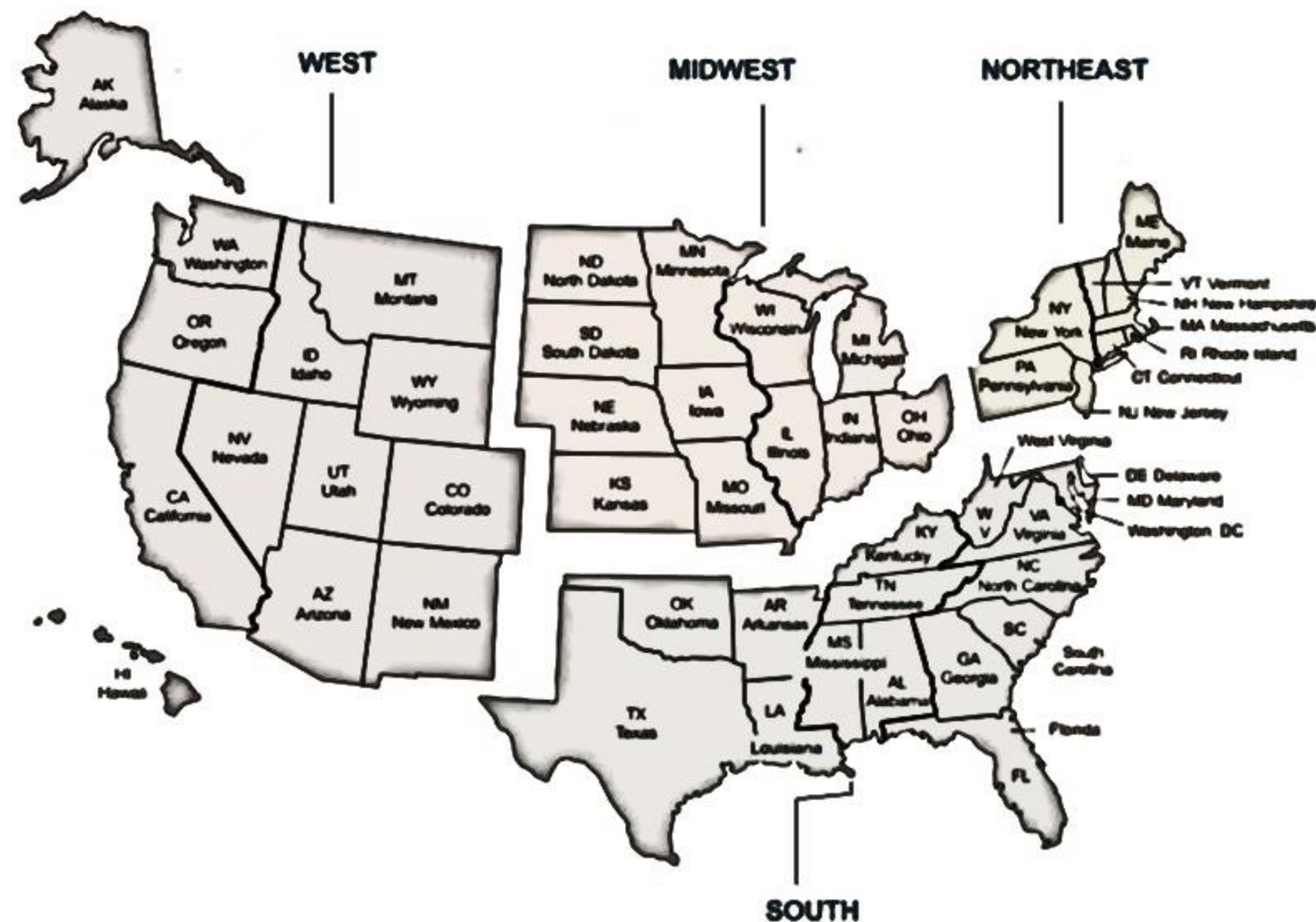


PROJECT OVERVIEW

Data weighting. The survey sampling plan used in this project collected approximately 300 fully-completed surveys in each of the four regions shown in the map below. The overall results presented in this report are weighted to reflect the actual populations of the regions.

Moving forward. The COVID-19 situation is rapidly evolving, and its impact on the travel industry is far from clear. As a result, Destination Analysts plans to conduct this survey weekly into the foreseeable future. Weekly reports have been, or will be, made on the following schedule at right.

Map of U.S. Showing Survey Regions:



	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18
Wave #11	May 22-24	May 25
Wave #12	May 29-31	June 1
Wave #13	June 5-7	June 8
Wave #14	June 12-14	June 15
Wave #15	June 19-21	June 22
Wave #16	June 26-28	June 29
Wave #17	July 3-5	July 6
Wave #18	July 10-12	July 13
Wave #19	July 17-19	July 20
Wave #20	July 24-26	July 27
Wave #21	July 31-Aug 2	August 3
Wave #22	August 7-9	August 10
Wave #23	August 14-16	August 17
Wave #24	August 20-22	August 23
Wave #25	August 28-30	August 31
Wave #26	September 4-6	September 7
Wave #27	September 11-13	September 14
Wave #28	September 18-20	September 21
Wave #29	September 25-27	September 28
Wave #30	October 2-4	October 5
Wave #31	October 9-10	October 12
Wave #32	October 16-18	October 19
Wave #33	October 23-25	October 26
Wave #34	October 30- Nov 1	November 2
Wave #35	November 6-8	November 9
Wave #36	November 13-15	November 16
Wave #37	November 20-22	November 23
Wave #38	November 27-29	November 30
Wave #39	December 4-6	December 7
Wave #40	December 11-13	December 14
Wave #41	December 18-20	December 21
Wave #42	December 25-27	December 28
Wave #43	January 1-3	January 4
Wave #44	January 8-10	January 11

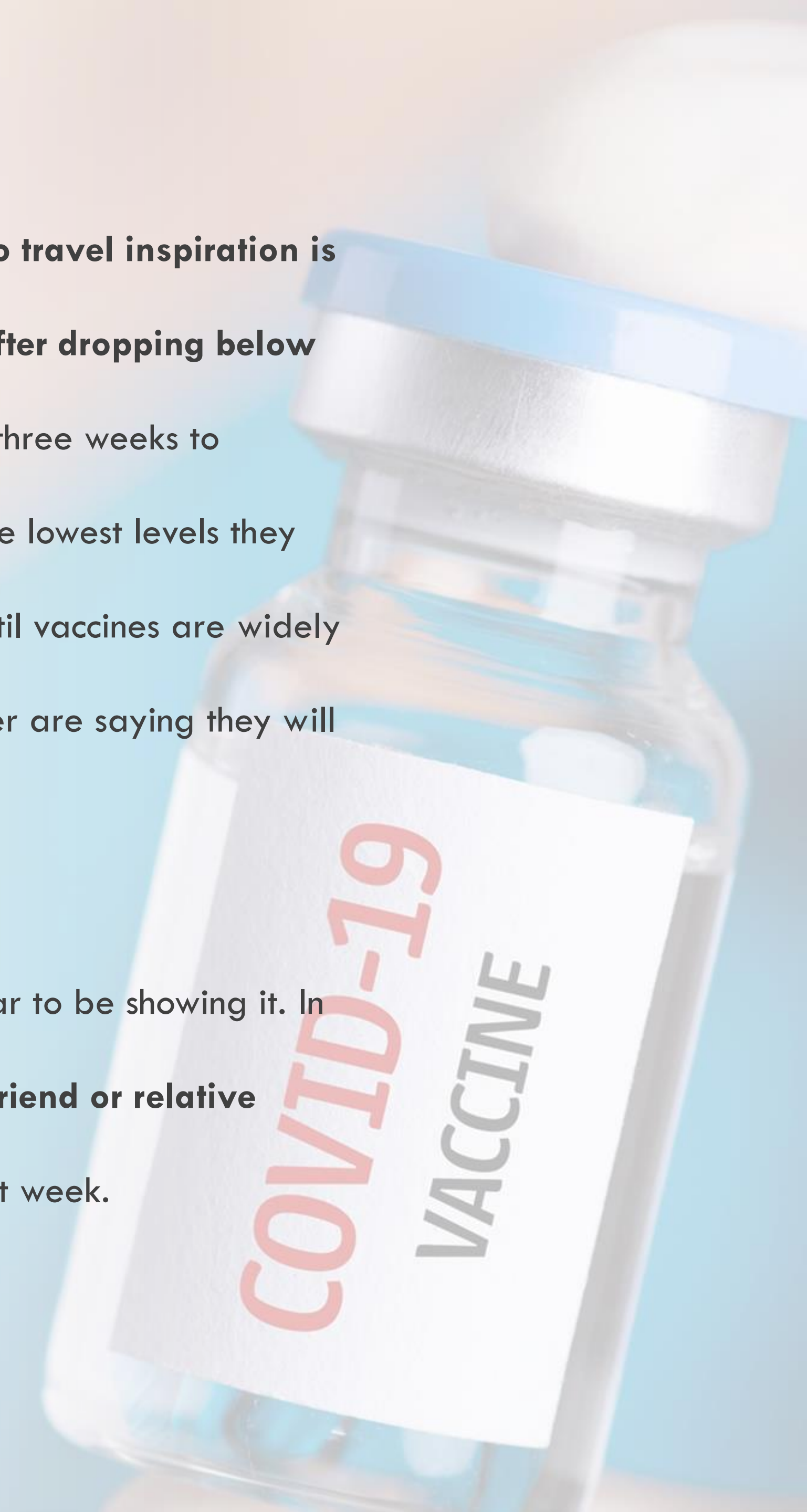
TOP TAKEAWAYS

The following are the top takeaways that emerged from Wave 43 of this weekly consumer traveler sentiment tracking study.

- **After dropping in the latter half of December, Americans pessimistic that the pandemic will get worse in the U.S. in the next month increased this week to 55.9%.** As it concerns Americans' personal anxiety about contracting COVID-19, this decreased in the last week (to 6.6/10 from 6.9/10), yet high concerns about their friends and family getting the virus remained stably elevated (7.3/10). Meanwhile, as Americans remain uncertain about the amount government-issued stimulus checks will ultimately be, there are rising anxieties about the pandemic's impact on personal finances (6.0 up from 5.9) and the national economy (7.8 up from 7.5).
- And with coronavirus cases sustained at record-high levels, right now, just 41.9% of American travelers feel comfortable going out in their own communities for leisure activities—a metric that has still not returned to the pandemic period high of 47.4% registered the week of October 19th. Likewise, **perceptions of travel activities as safe also remains unreturned to October levels. In fact, nearly half of Americans say they are not confident they can travel safely in the current environment.**

TOP TAKEAWAYS

- Yet a new year is an oft-renewer of hope and optimism, and travel is a beneficiary. **Americans highly open to travel inspiration is up over 6% in the last week (52.6%), and Americans in a travel ready state-of-mind returned to 52.9% after dropping below 50% at the end of December.** Inversely, loss of interest in travel has retreated 6 percentage points in the last three weeks to 43.3%, and avoidance of international travel (70.9%) and conventions/conferences (68.6%) both hit one of the lowest levels they have been since the pandemic began. The percent of American travelers who that say they will avoid travel until vaccines are widely available has fallen to 46.7% after being well over 50% the week of Christmas, and more Americans than ever are saying they will take the vaccine (60.1%).
- When asked this week, nearly 60% of American travelers say they miss traveling “very much,” and they appear to be showing it. In fact, **38.4% say they have day-dreamed about taking a trip in the last week and a third have talked to a friend or relative about a future trip.** Nearly a quarter of American travelers have researched travel ideas online just in the past week.



TOP TAKEAWAYS

- **As Americans look out over their travel year in this first week of January, they cautiously see an average of 3.0 leisure trips in 2021.** (Note: If this expectation holds true, leisure trips will be down approximately 39% from 2019 levels). It appears trips will ramp up beginning in May, peak in July, ramp back down in October and bump up again in December. About 18% anticipate their first trip by commercial airline in 2021 will be in the second quarter (April-June). Aspirations to visit Florida, Las Vegas, New York, California, Hawaii and Colorado remain most common.
- **For many Americans, making travel dreams reality will likely be for later in the year.** We asked Americans about their travel in the next three months. The majority do not plan to travel—37.5% do. While 84.5% of these trips will indeed be overnight trips, 66.2% will be regional, and over a third of those traveling say they will be staying in the home of a friend or relative rather than paid accommodations. Both cities and small towns and rural areas will most commonly be visited, however the pandemic will still be dictating trip behaviors. 41.3% plan to visit less crowded places and 30.2% plan to visit outdoor-oriented destinations.

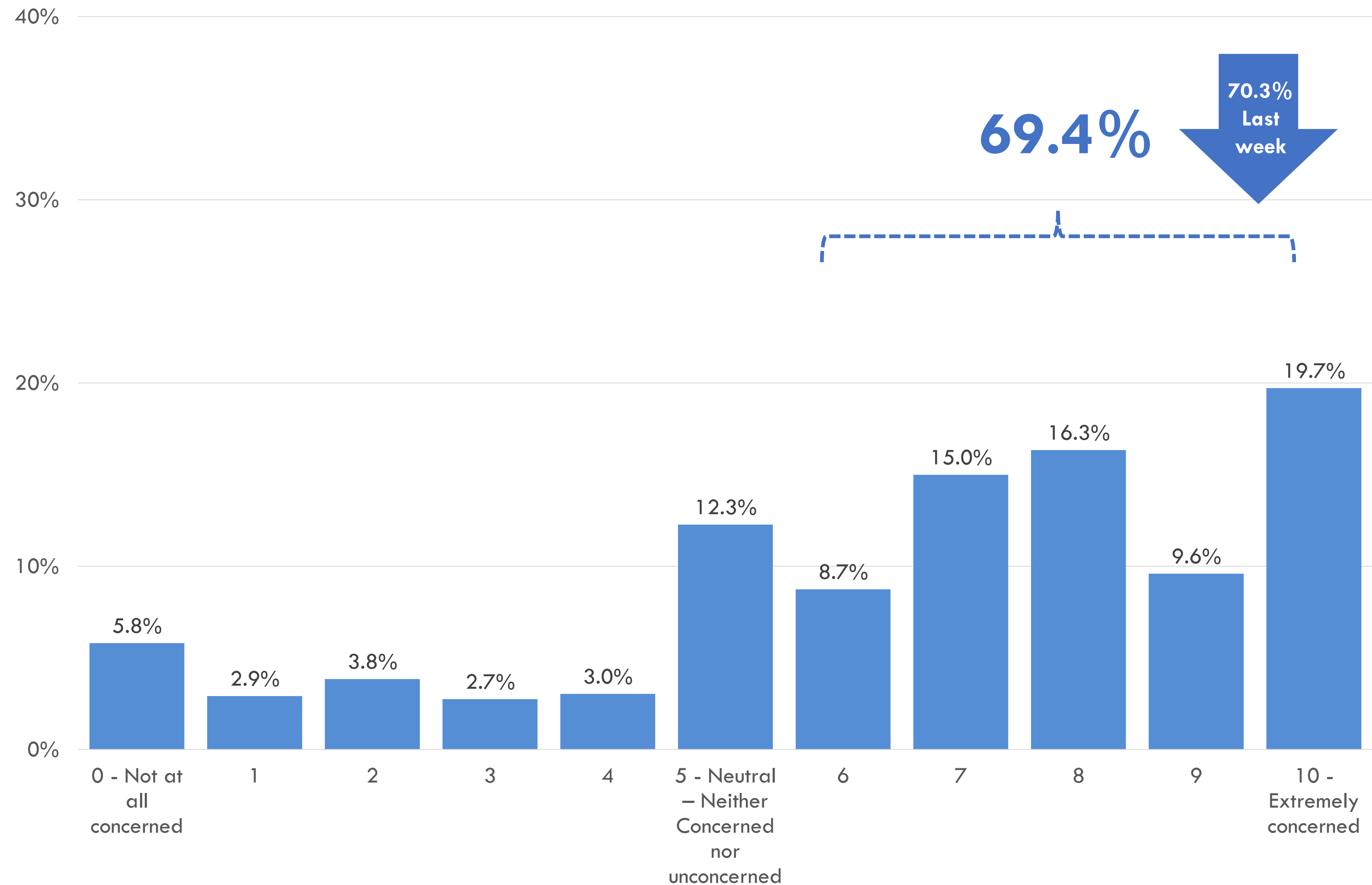
A woman with long brown hair, wearing glasses, a blue surgical face mask, a white turtleneck, a long brown coat, and blue jeans, stands in an airport terminal. She is holding a yellow rolling suitcase with her right hand. The background shows airport check-in counters and a red stanchion with a red belt. The text "CURRENT FEELINGS ABOUT THE CORONAVIRUS & TRAVEL" is overlaid in the center of the image.

**CURRENT FEELINGS ABOUT
THE CORONAVIRUS & TRAVEL**

PERSONAL HEALTH CONCERNS

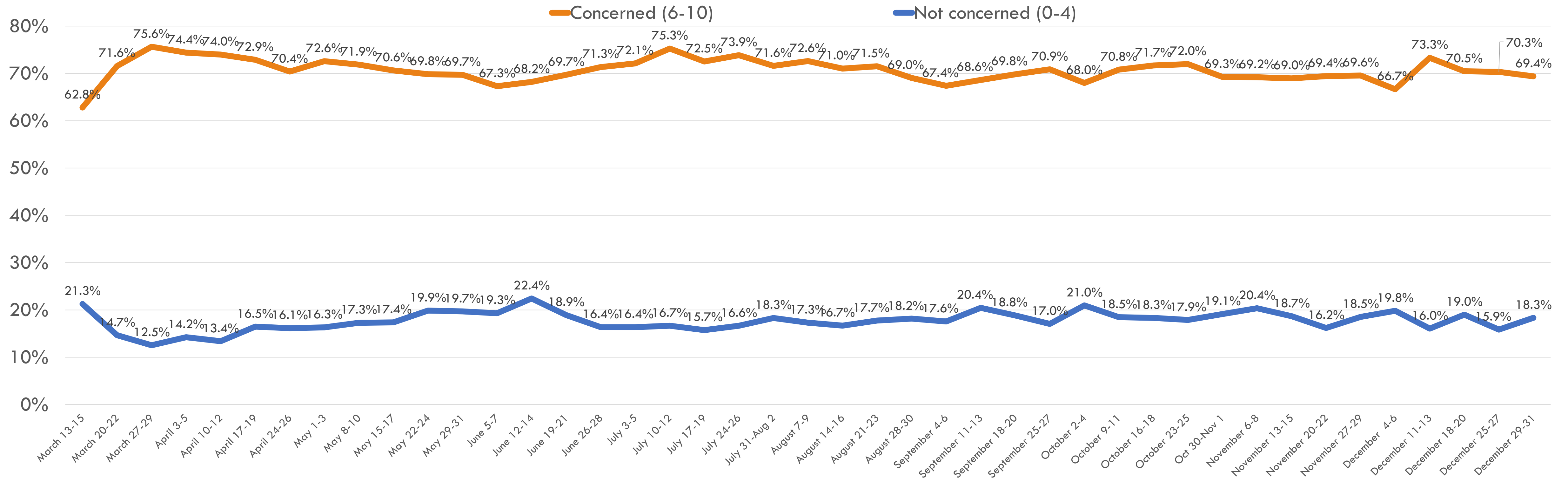
Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



PERSONAL HEALTH CONCERNS (WAVES 1-43)

Question: Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)

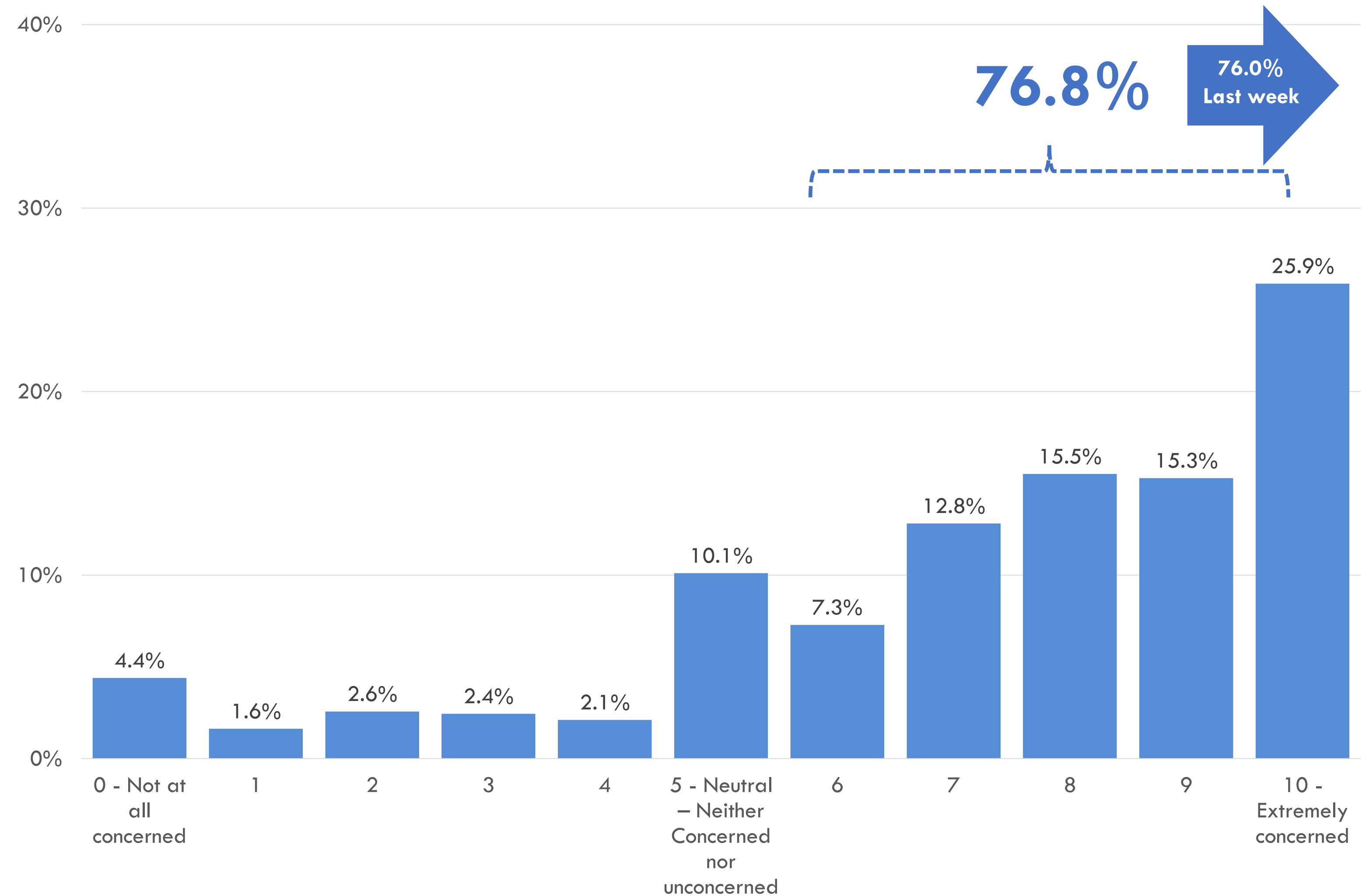


(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

HEALTH CONCERNS (FAMILY & FRIENDS)

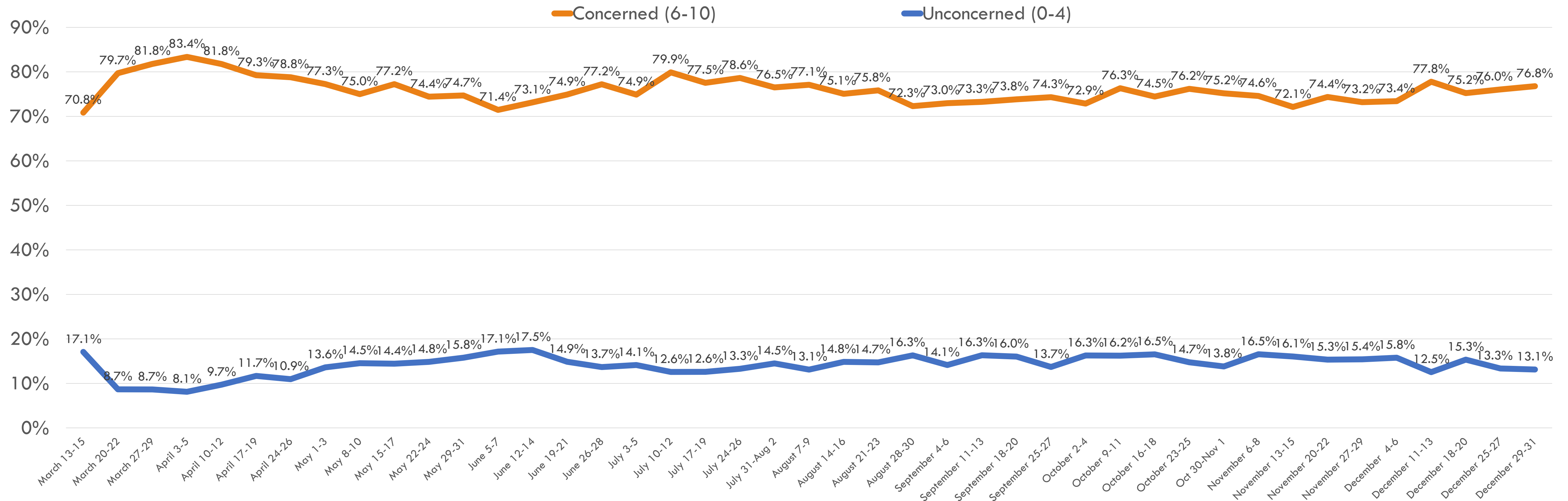
Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-43)

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

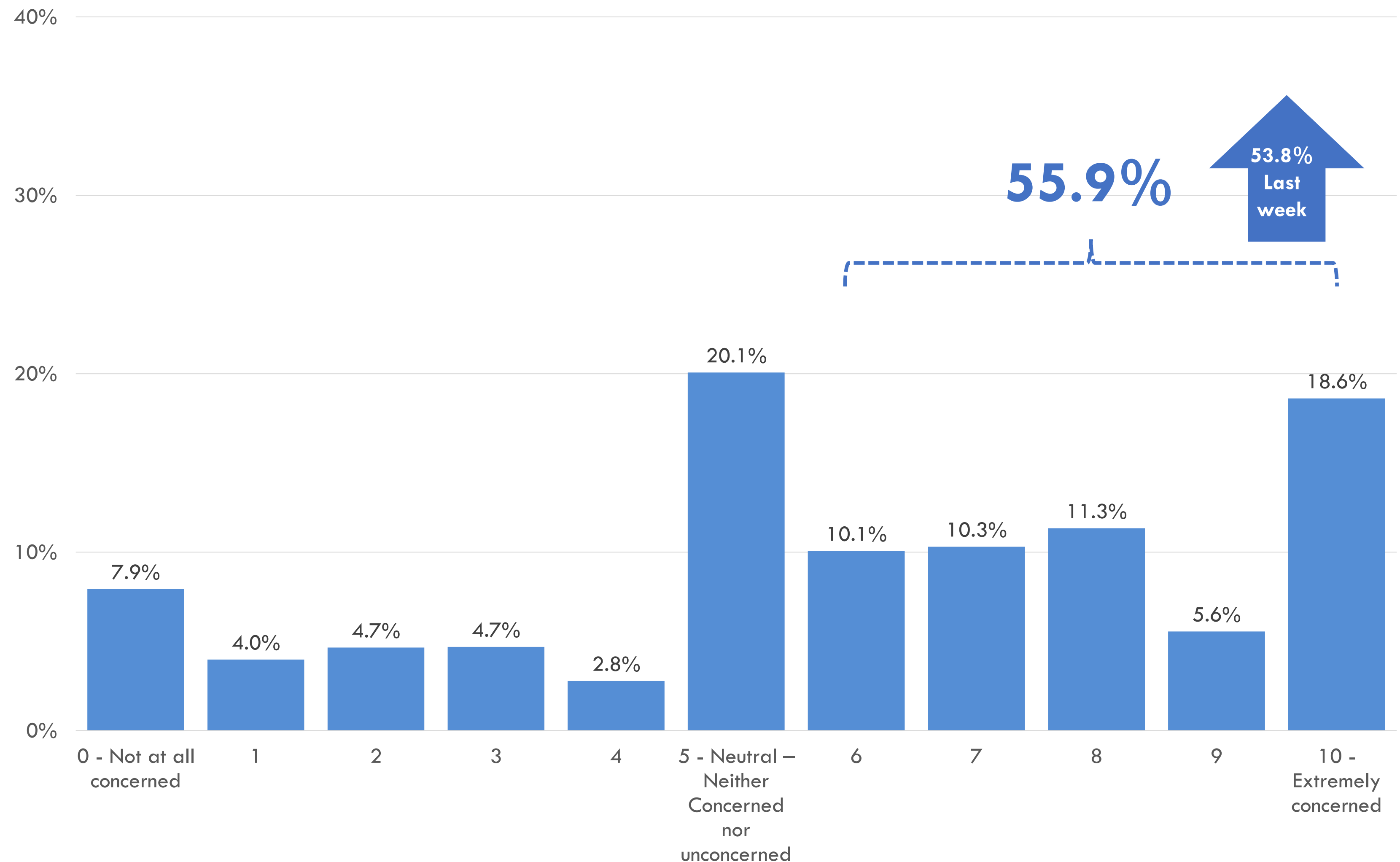


(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

CONCERNS ABOUT PERSONAL FINANCES

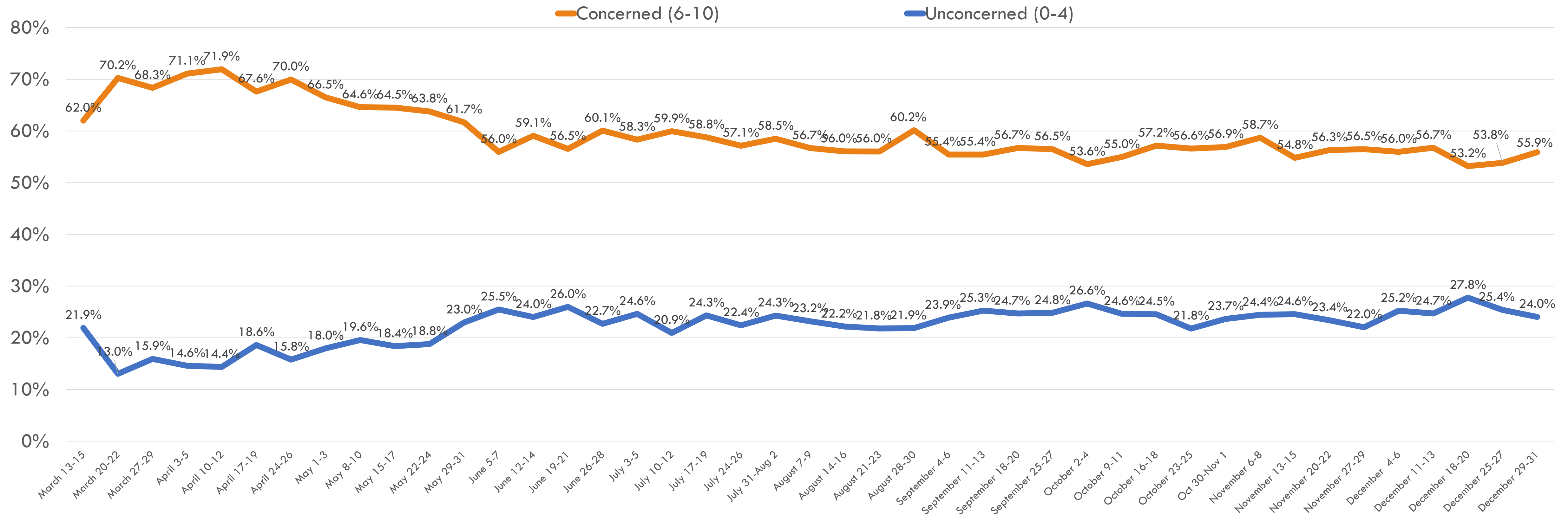
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-43)

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

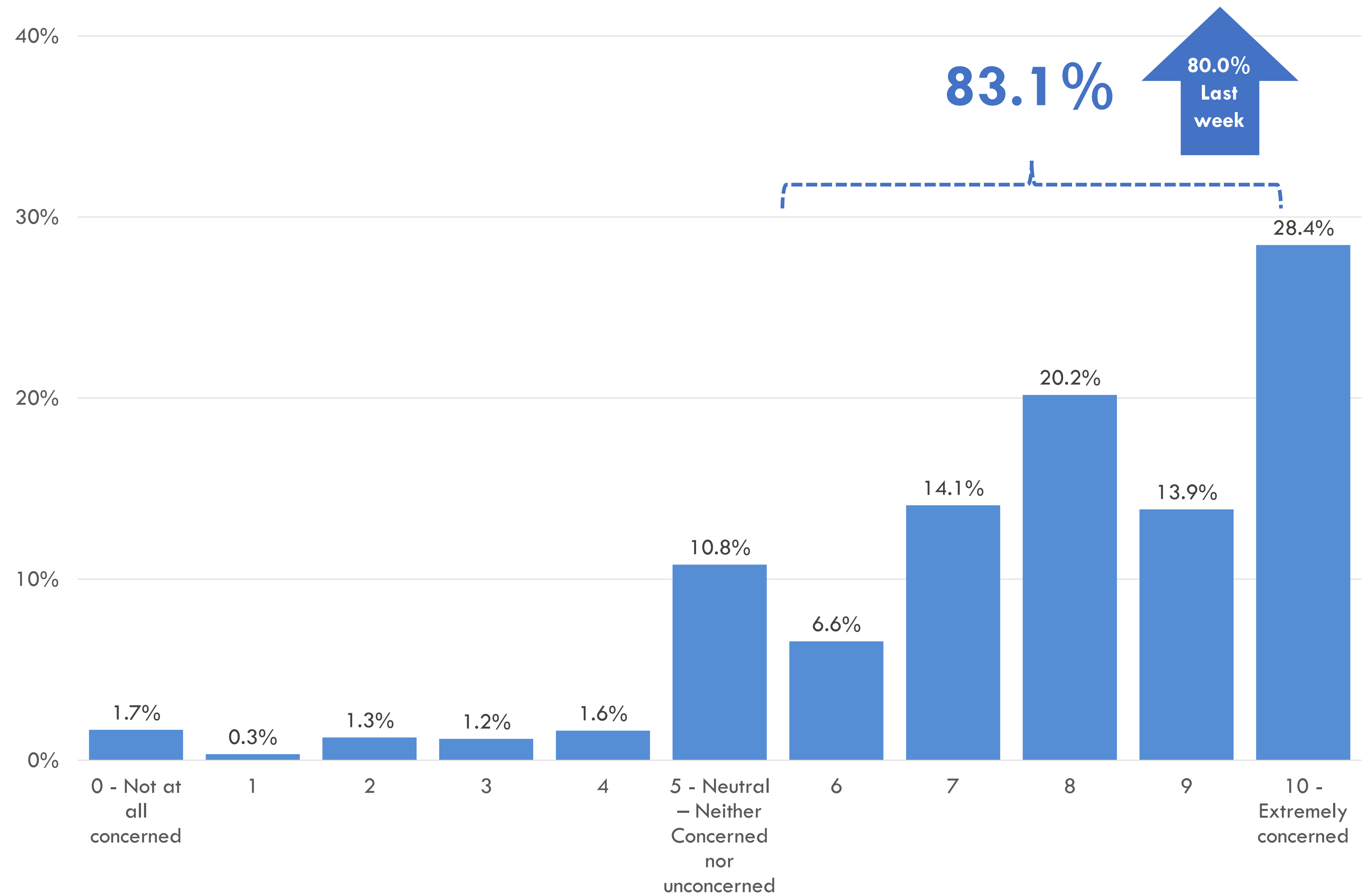


(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

CONCERNS ABOUT NATIONAL ECONOMY

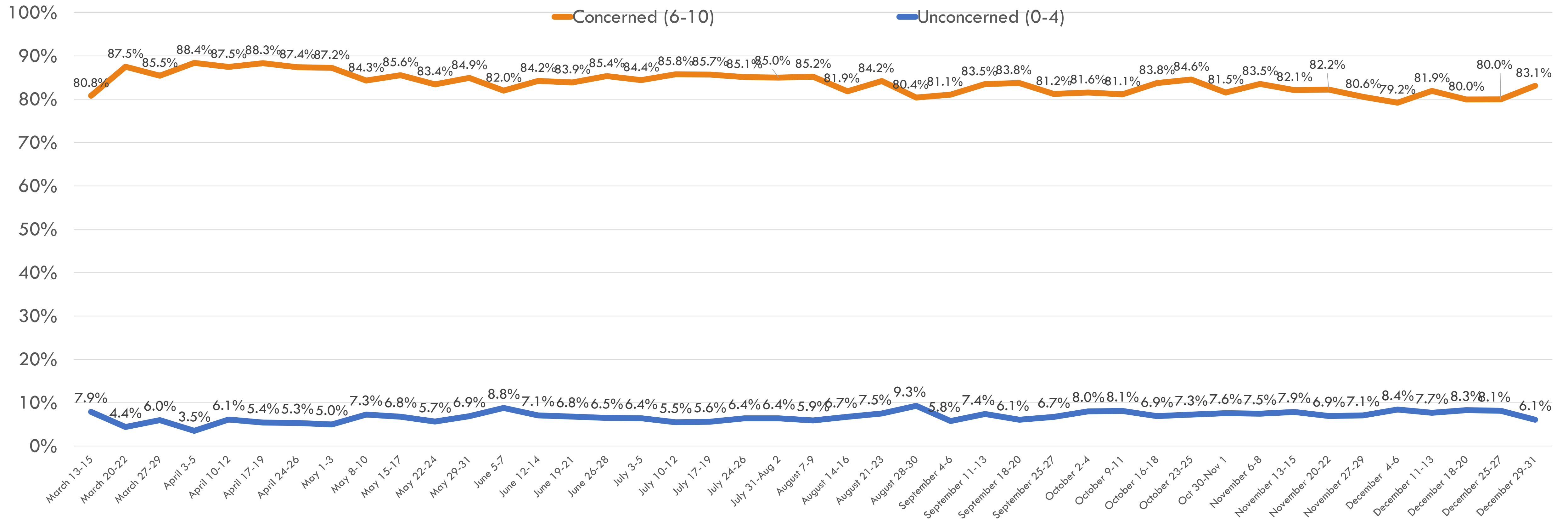
Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-43)

Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?



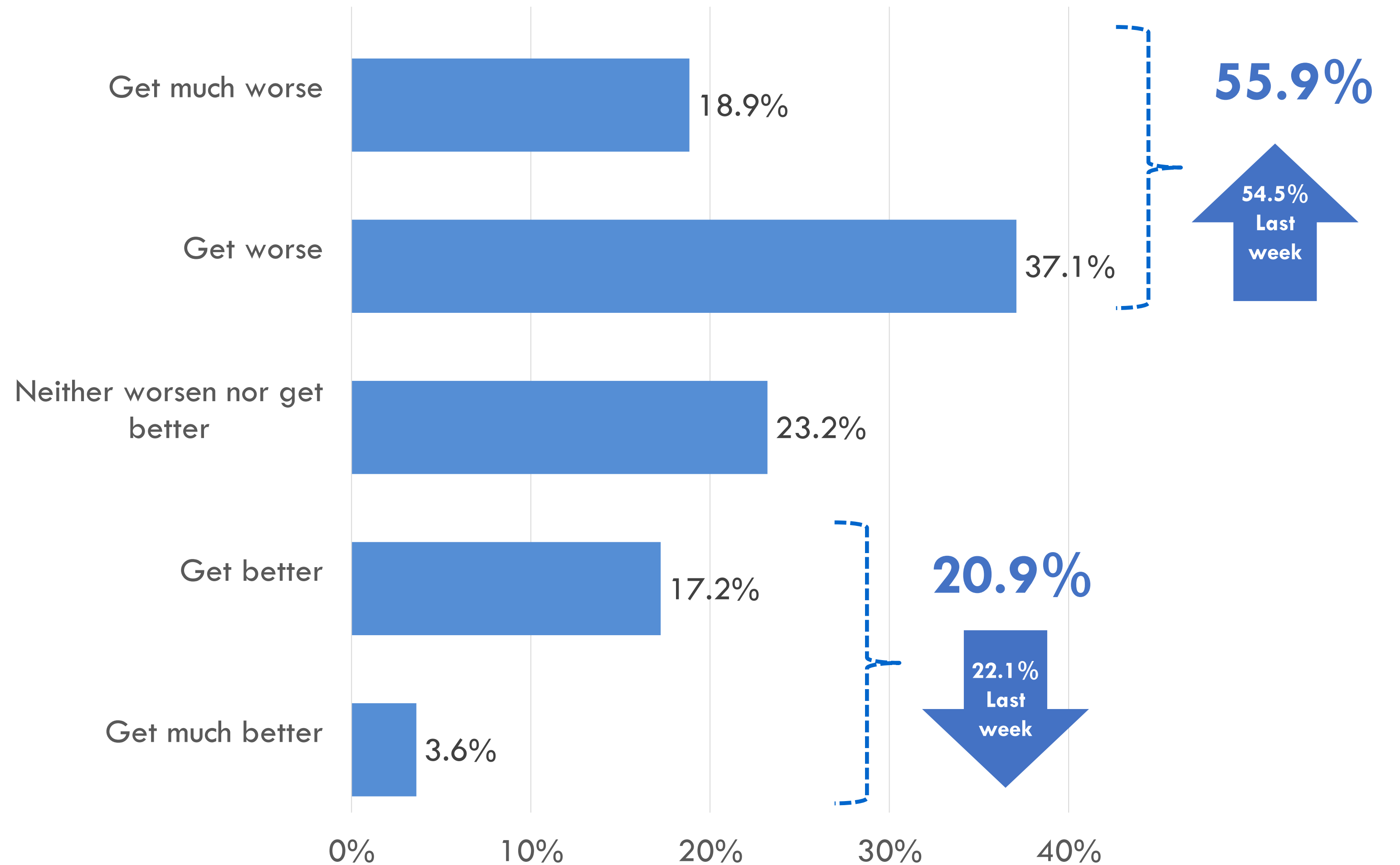
(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

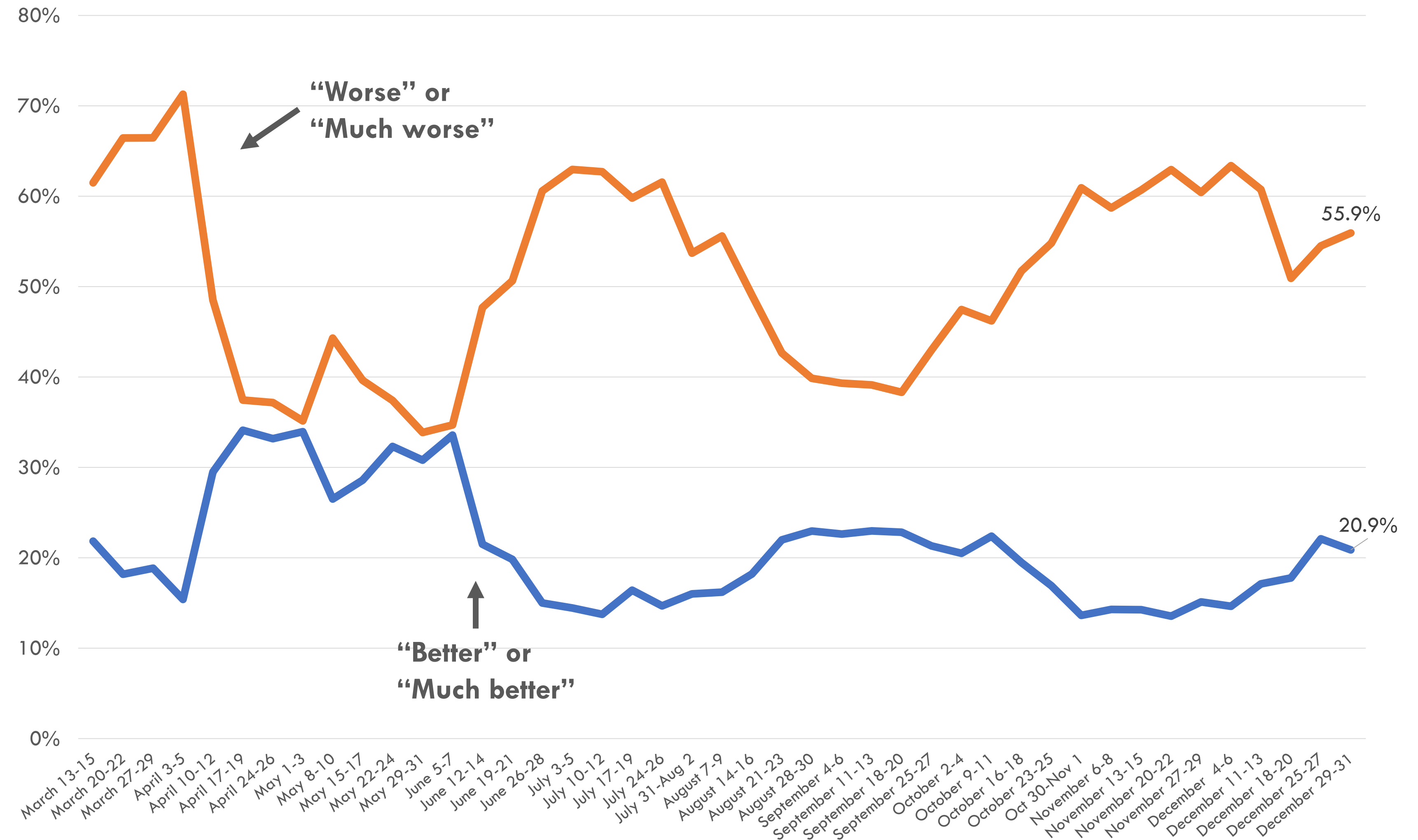


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-43)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will _____

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

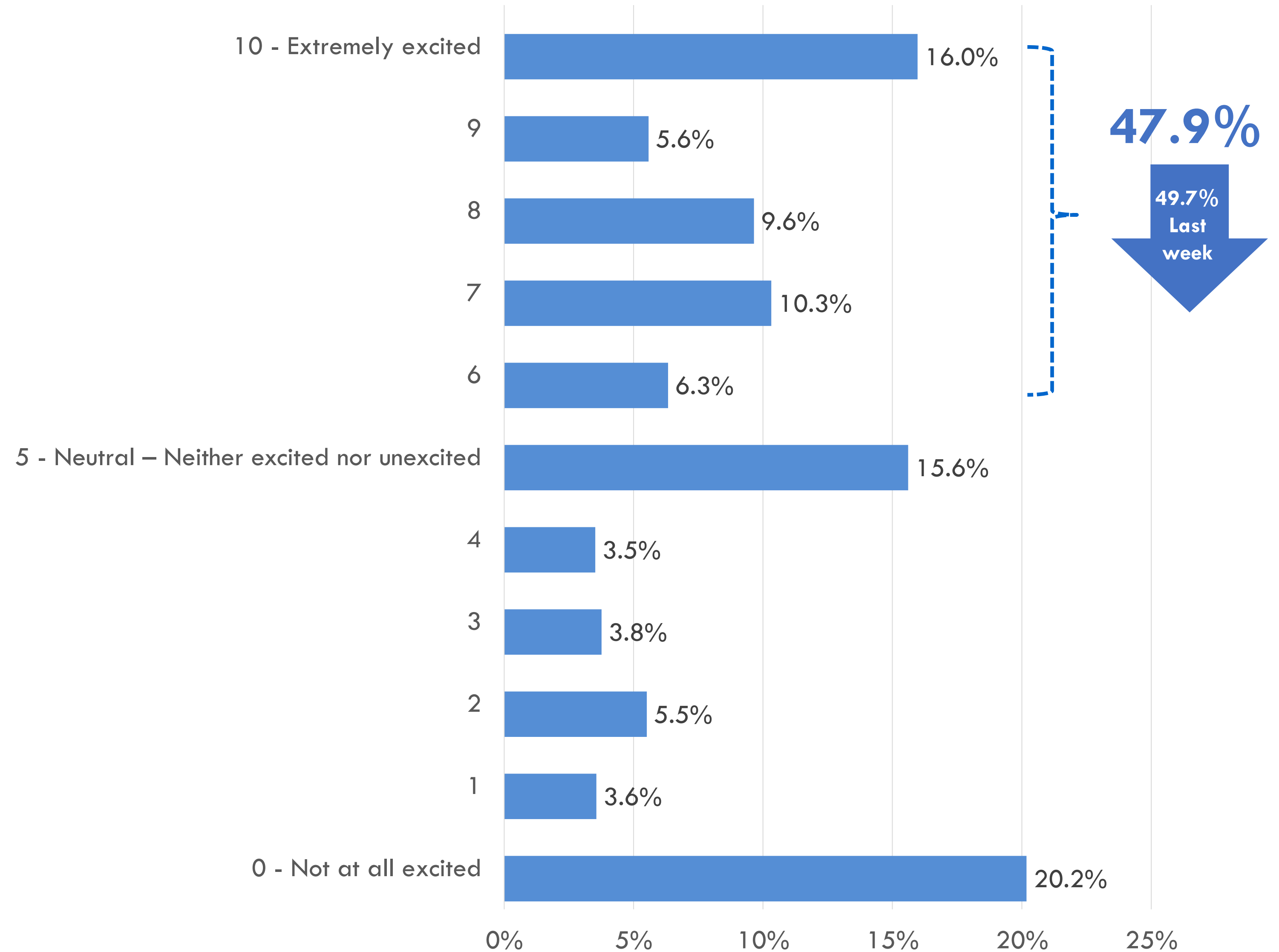


EXCITEMENT TO TRAVEL NOW

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

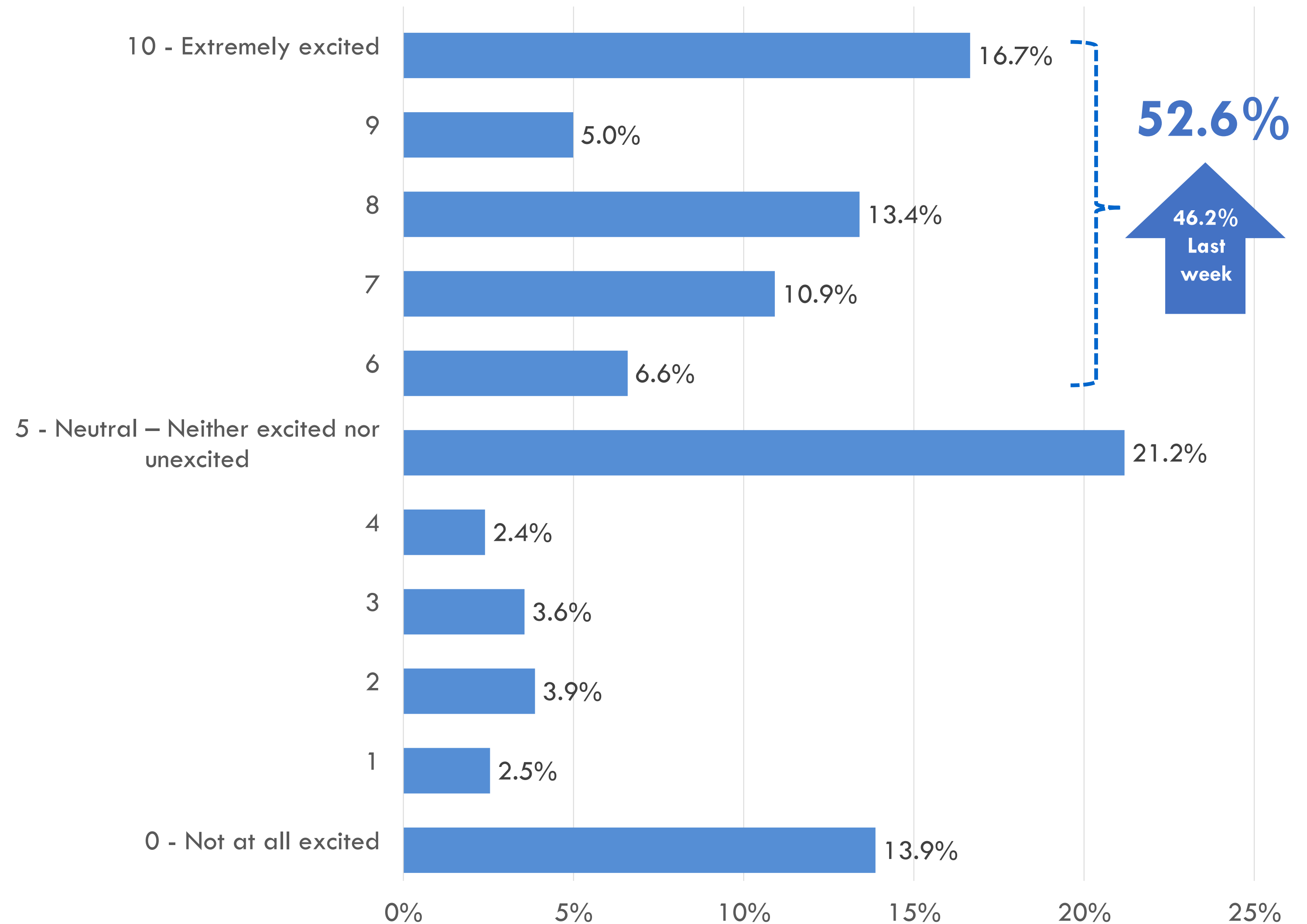
(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



OPENNESS TO TRAVEL INSPIRATION

Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

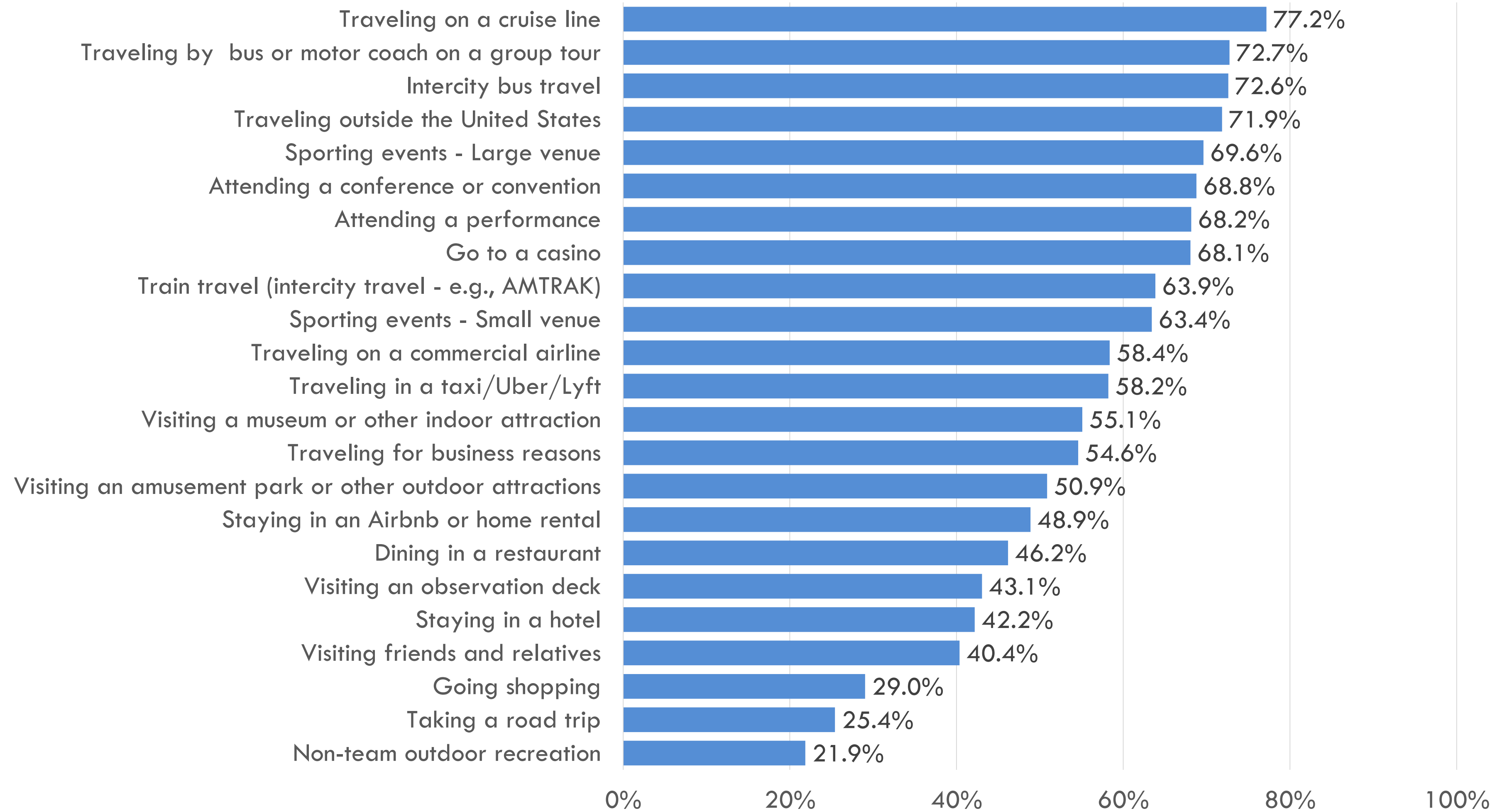


PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 43)

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

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”

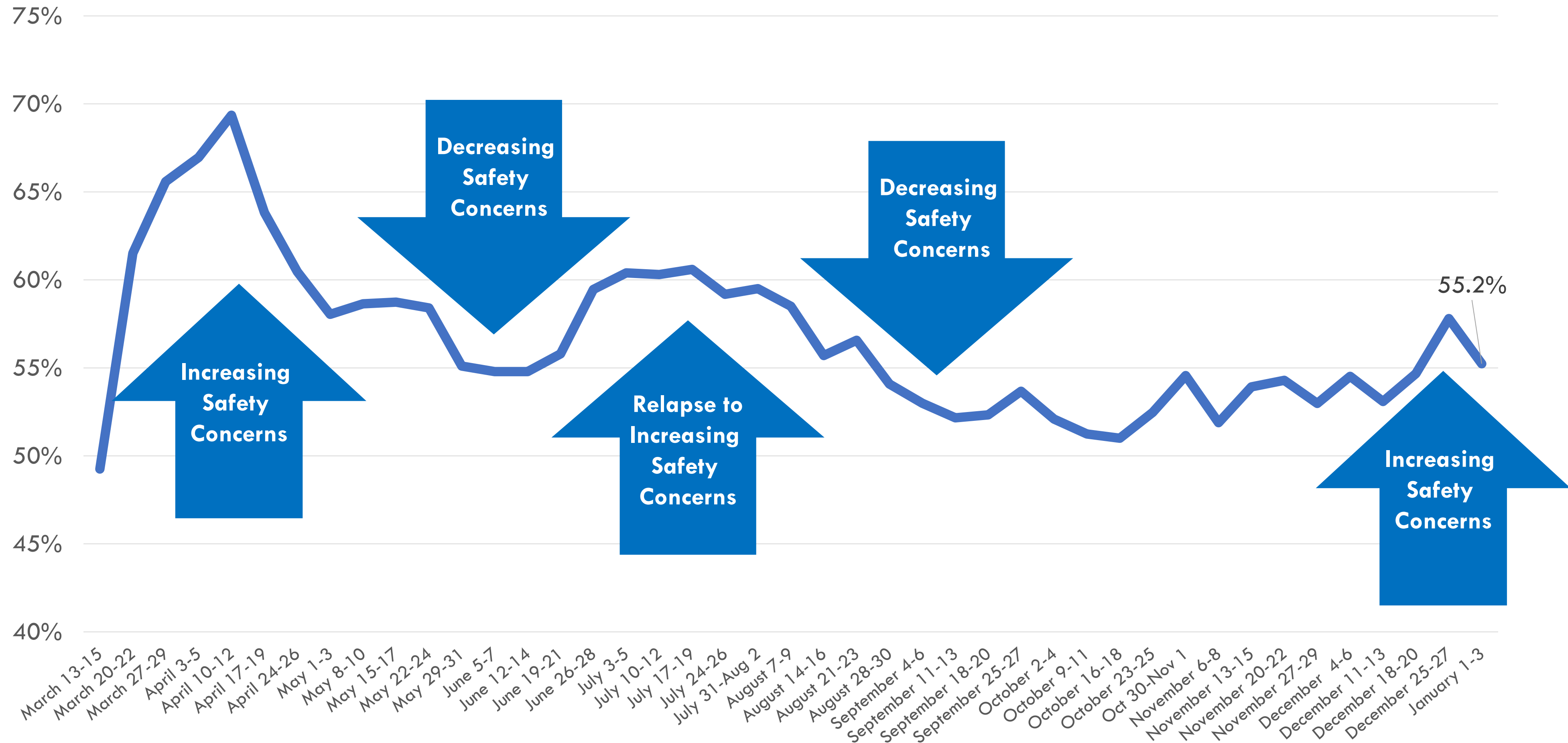


PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-43 COMPARISON)

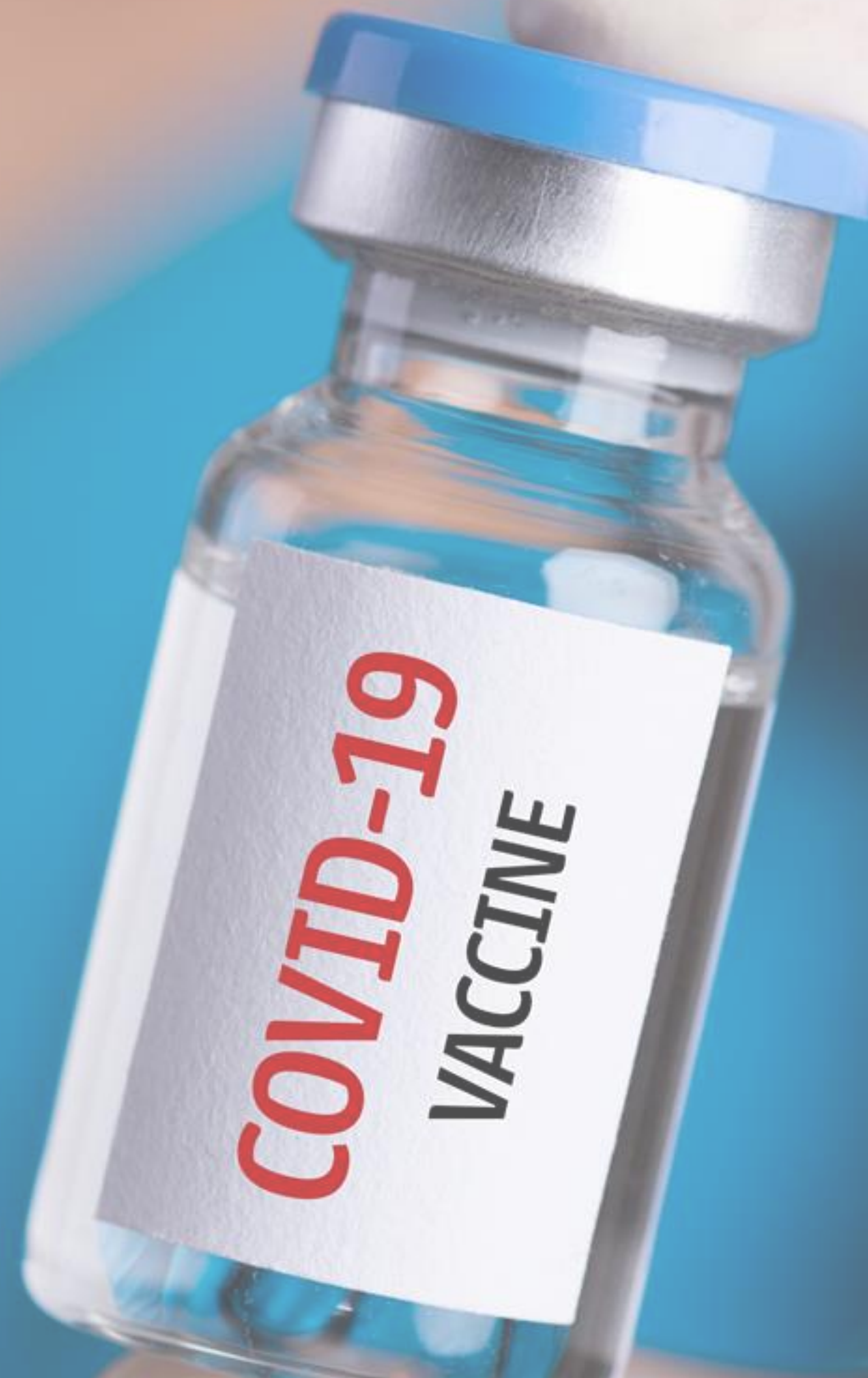
% Somewhat unsafe or Very unsafe (AVERAGE SCORE FOR ALL ACTIVITIES TESTED)

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

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



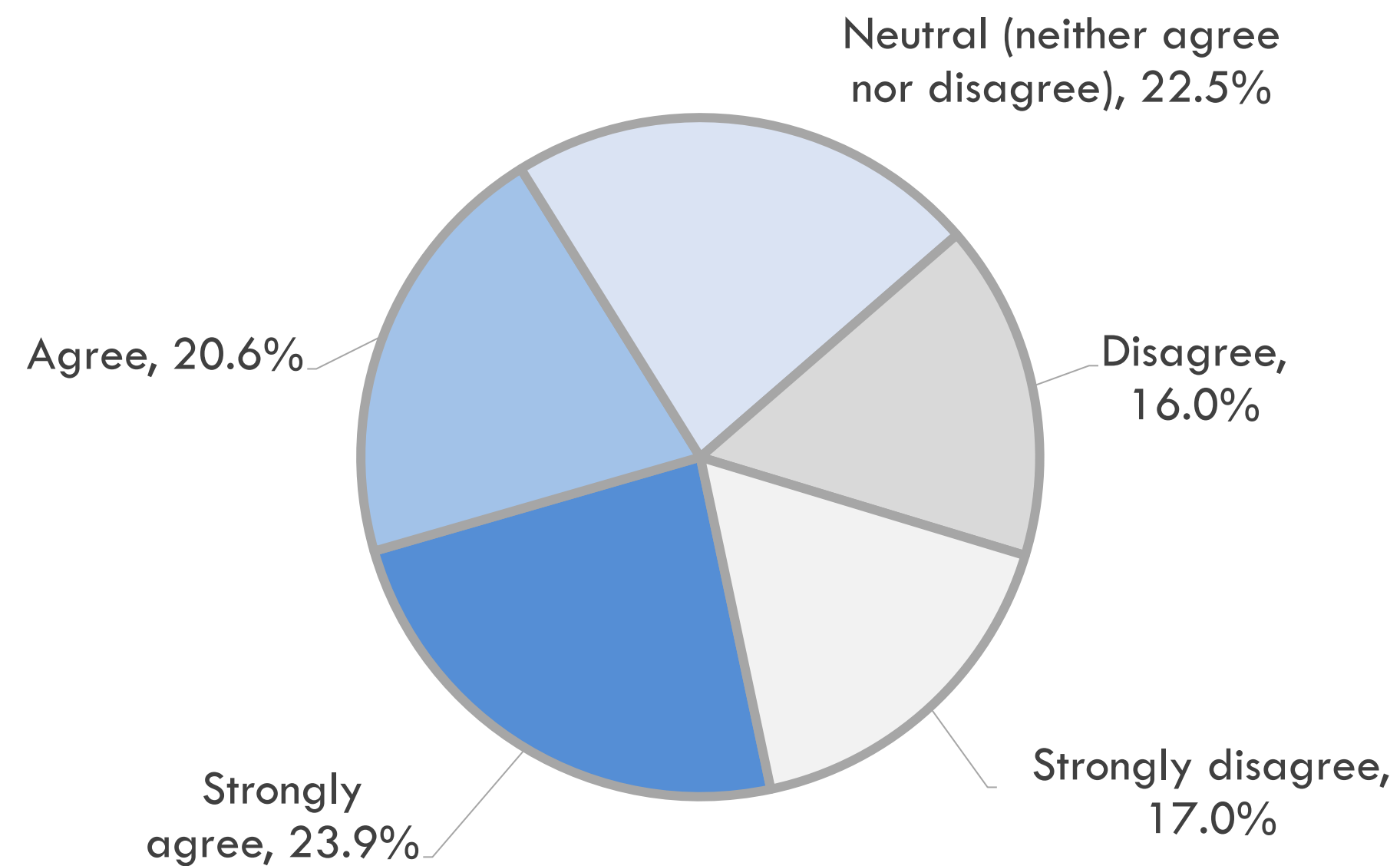
FEELINGS ABOUT A COVID-19 VACCINE



TRAVEL UNTIL GETTING THE VACCINE

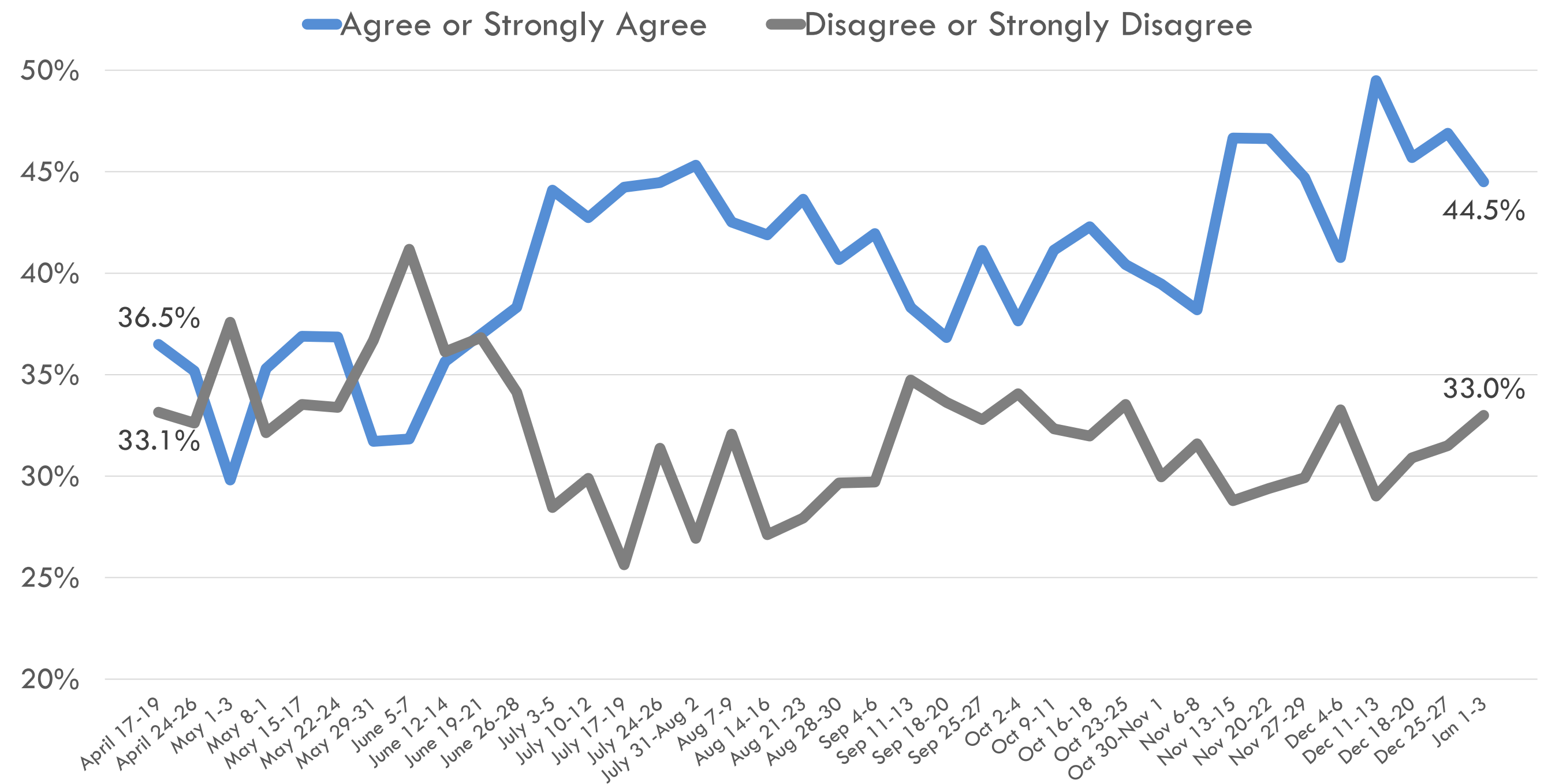
How much do you agree with the following statement?

Statement: I'm not traveling until I am able to get a vaccine.



(Base: Waves 6-43. All respondents, 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 and 1,206 completed surveys.)

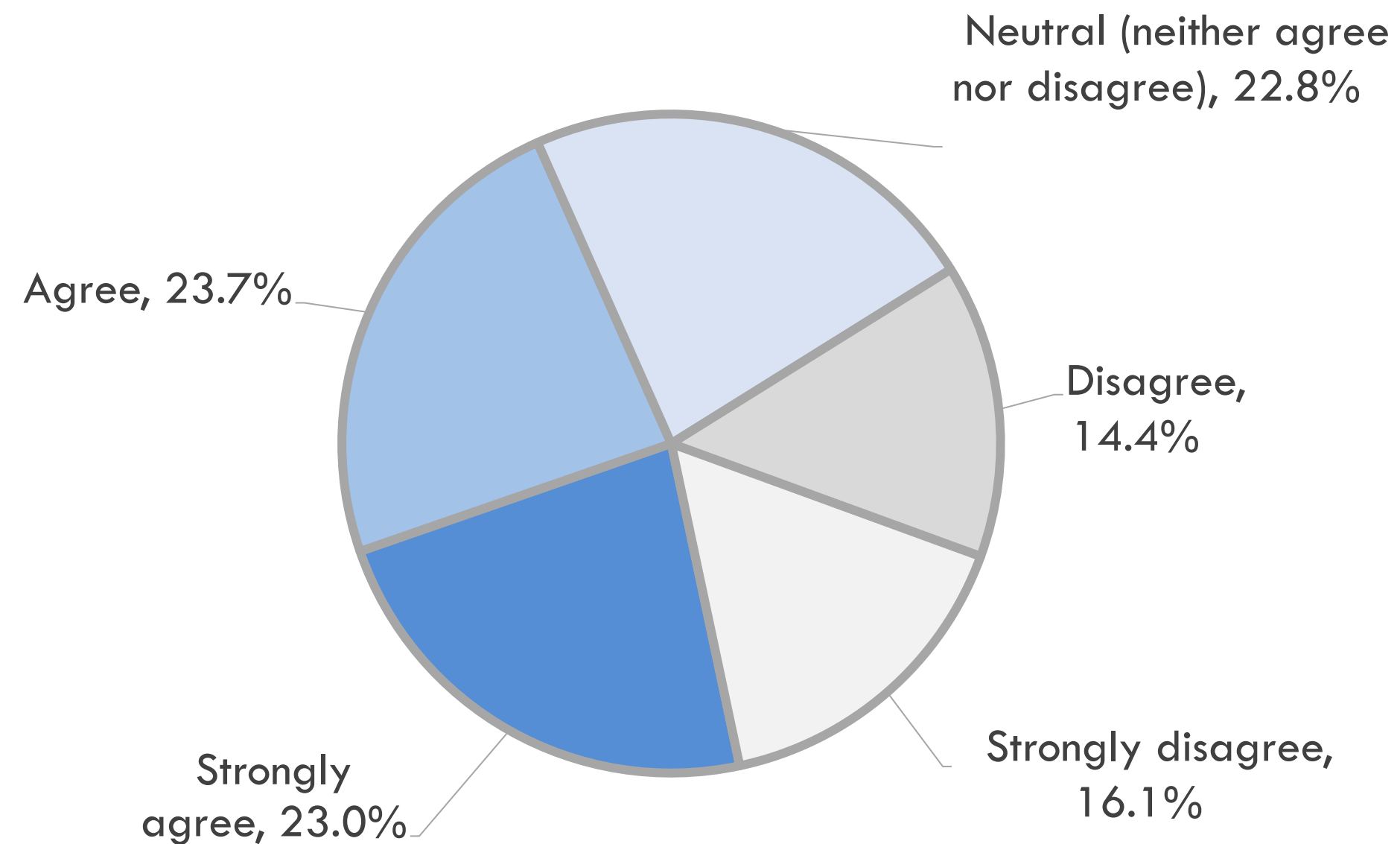
Historical data



TRAVEL UNTIL VACCINES ARE MADE WIDELY AVAILABLE

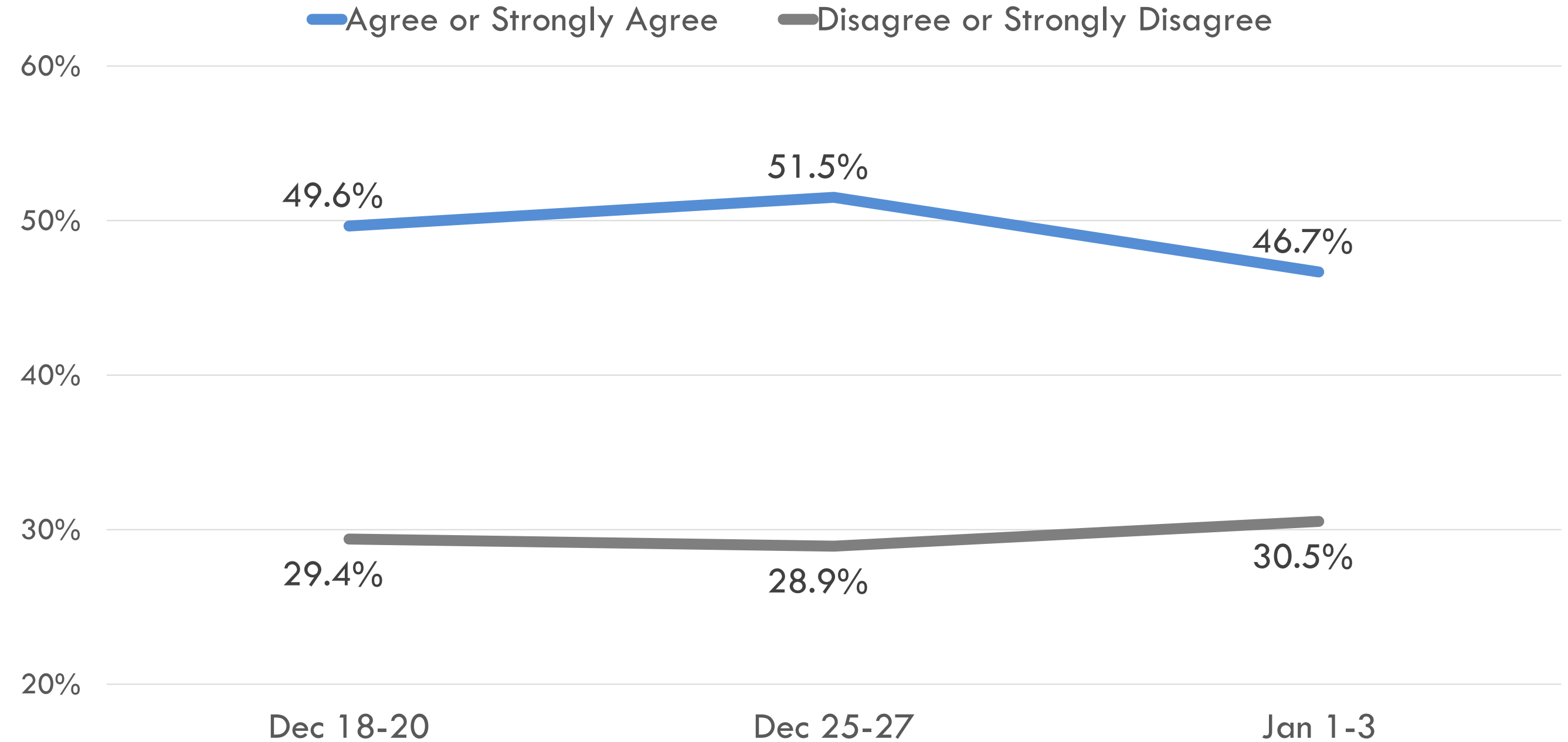
How much do you agree with the following statement?

Statement: I'm not traveling until vaccines are made widely available.



(Base: Waves 41-43. All respondents, 1,201, 1,207 and 1,206 completed surveys.)

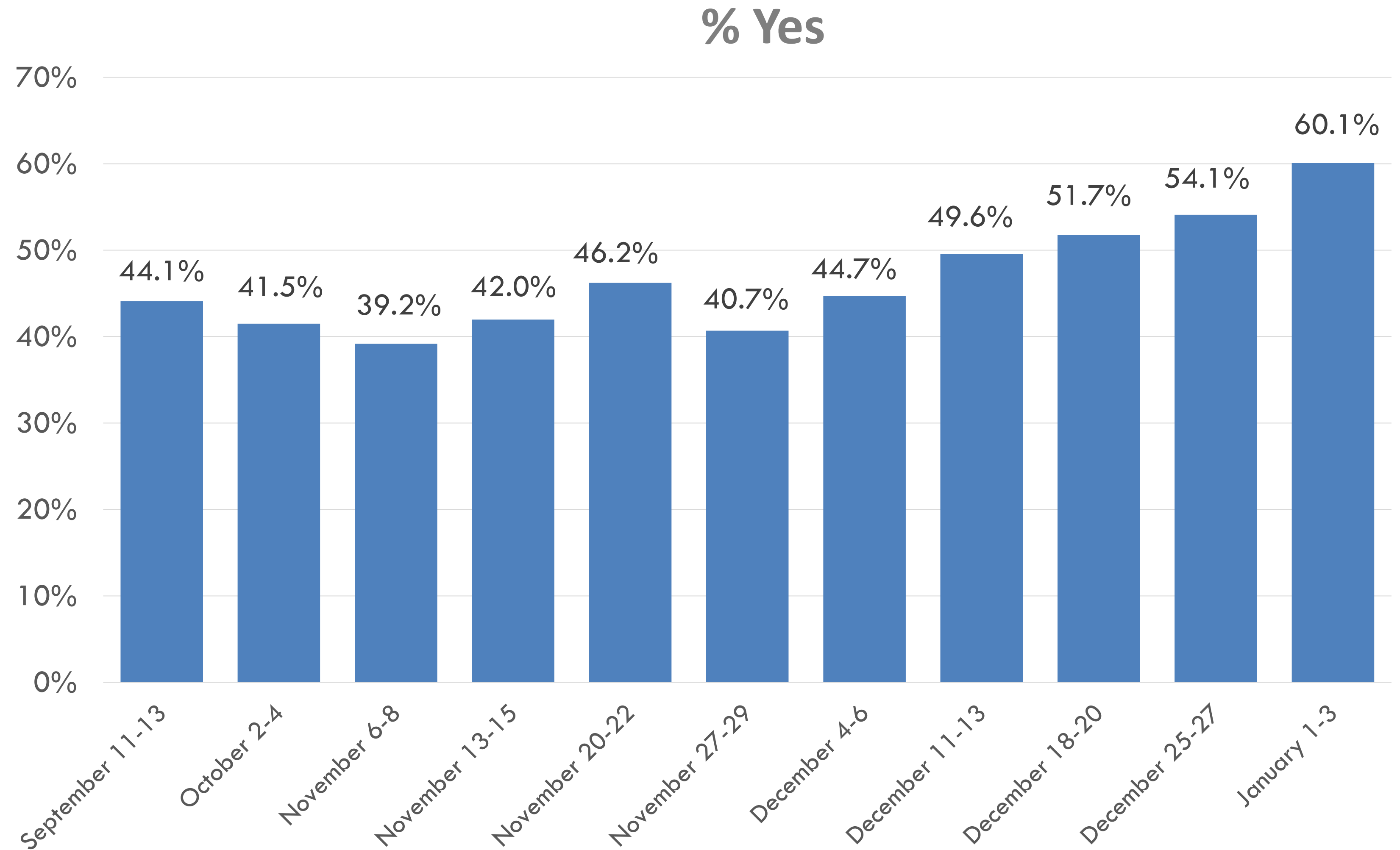
Historical data



EXPECTATIONS TO TAKE A COVID-19 VACCINE

Question: Do you expect that you will take one of the recently developed COVID-19 vaccines?

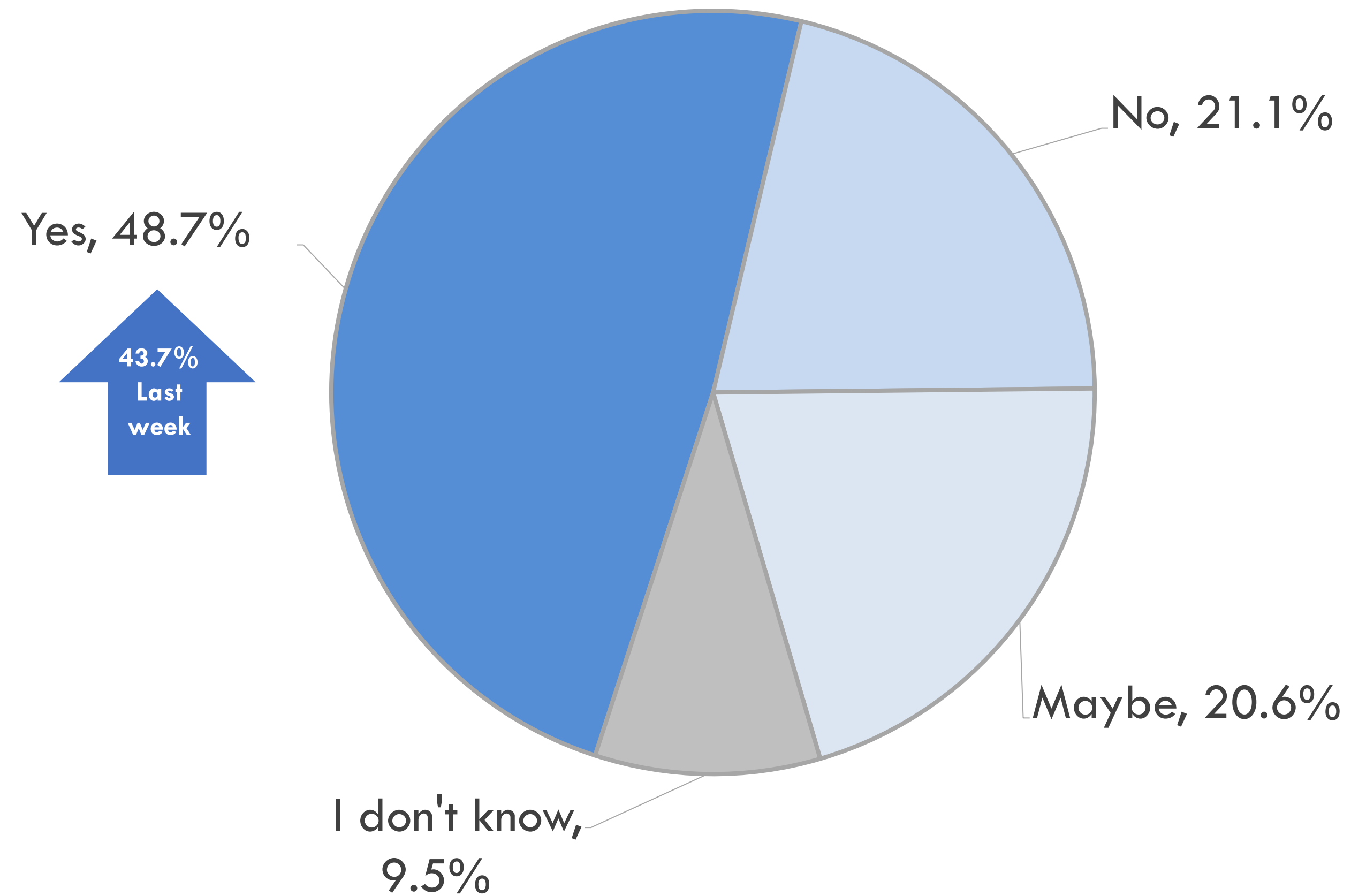
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



VACCINES FOR CHILDREN

Question: Will you have your children take a COVID-19 vaccine? (Select one)

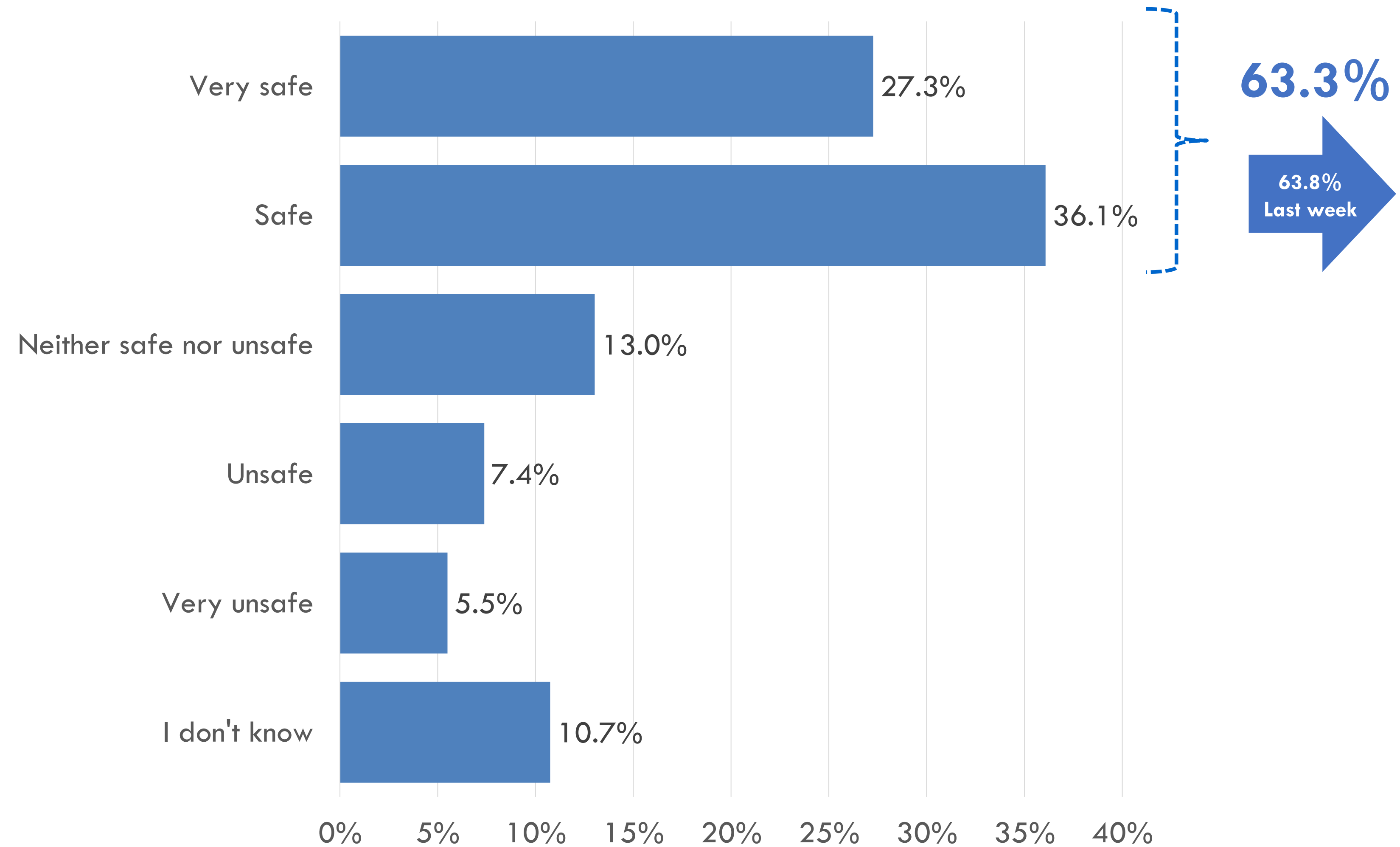
(Base: Wave 43 data. Respondents with school-aged children, 308 completed surveys. Data collected Jan 1-3, 2020)



EXPECTED SAFETY OF COVID-19 VACCINES

Question: How safe do you expect a COVID-19 vaccine will ultimately be? (Select one)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)

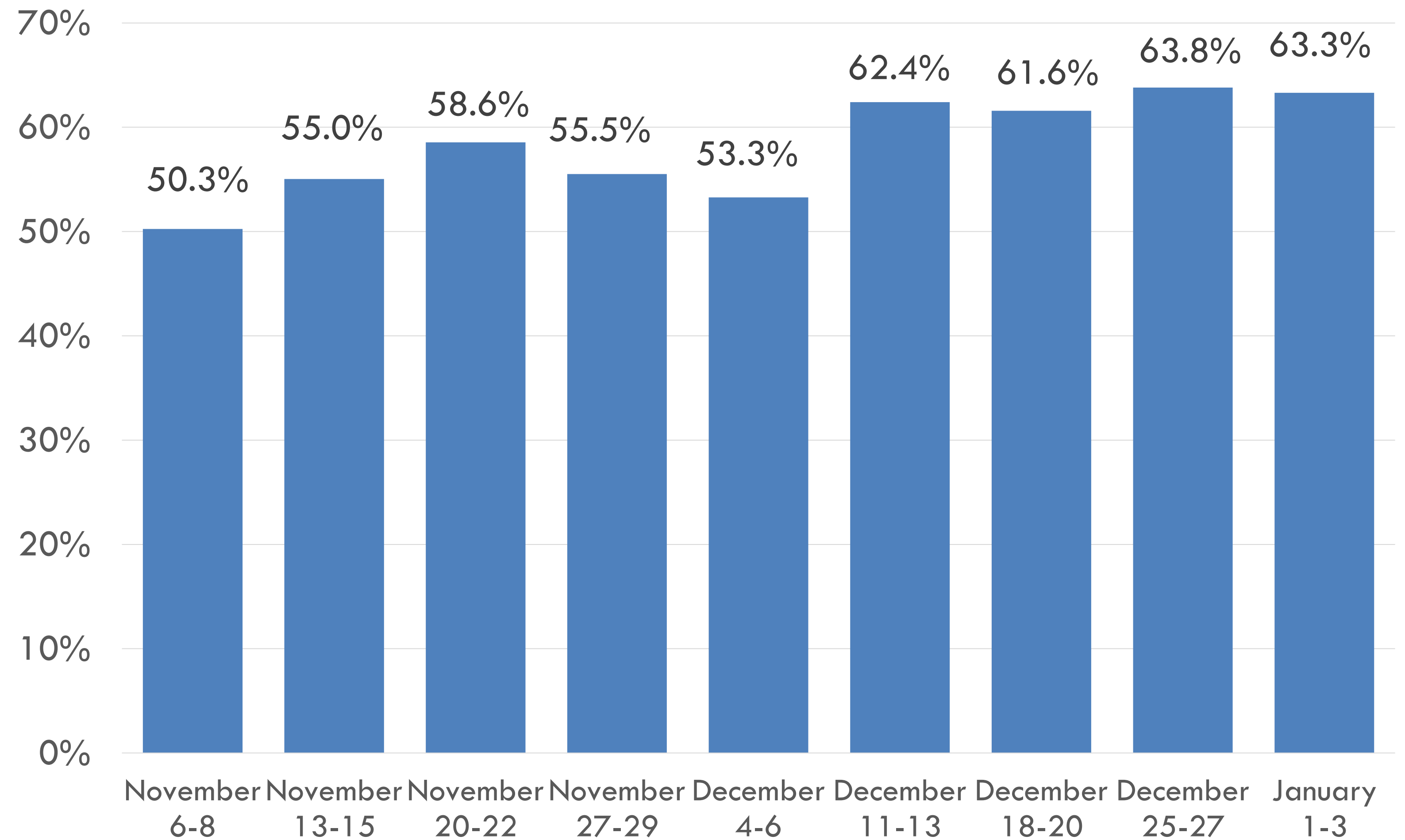


EXPECTED SAFETY OF COVID-19 VACCINES

Question: How safe do you expect a COVID-19 vaccine will ultimately be? (Select one)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)

Historical data (% Safe or Very safe)

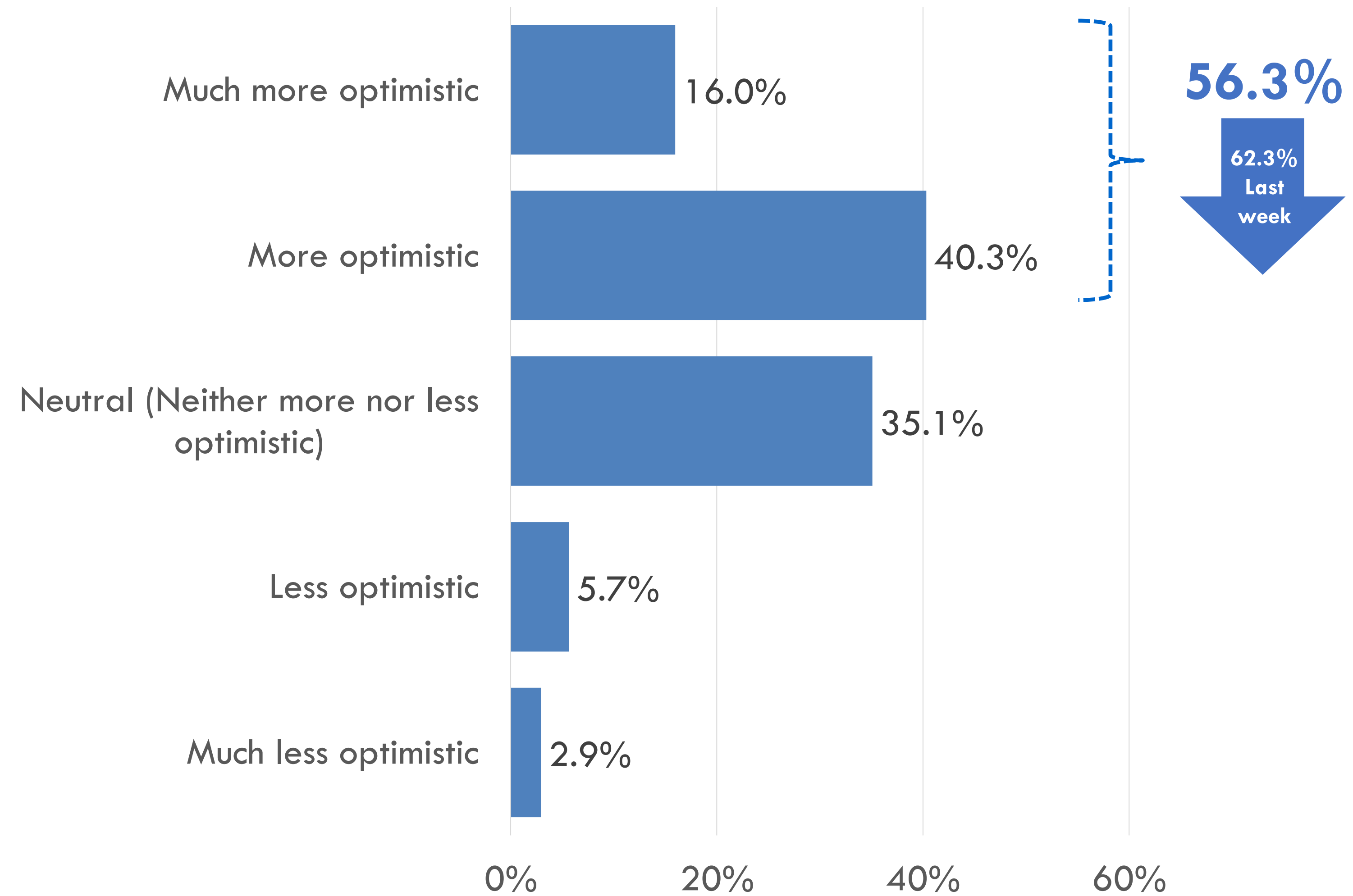


VACCINES AND OPTIMISM FOR A RETURN TO NORMAL

Question: Does recent news about vaccine developments affect your optimism about life returning to normal (or near normal) in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about life returning to normal (or near normal) in the next six months.

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)

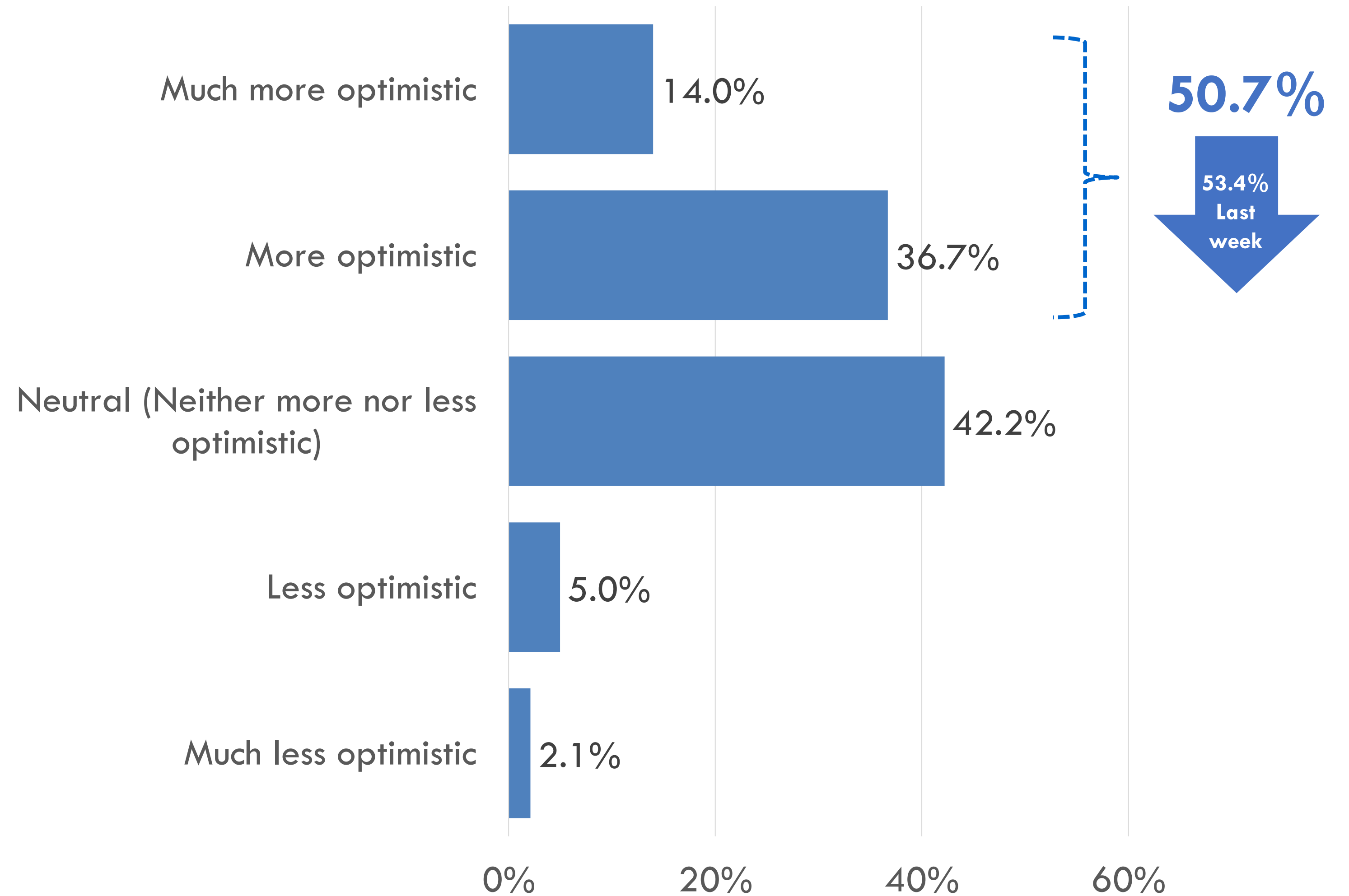


VACCINES AND OPTIMISM FOR SAFE TRAVEL

Question: Does recent news about vaccine developments affect your optimism about being able to travel safely in the next SIX (6) MONTHS? (Select one to fill in the blank)

The vaccine news has made me _____ about **BEING ABLE TO TRAVEL SAFELY** in the next six months.

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



TRAVEL PLANS DUE TO COVID-19 VACCINES

Question: Have you begun planning (or booking) any future travel in anticipation of the COVID-19 vaccine being widely available? (Select one)

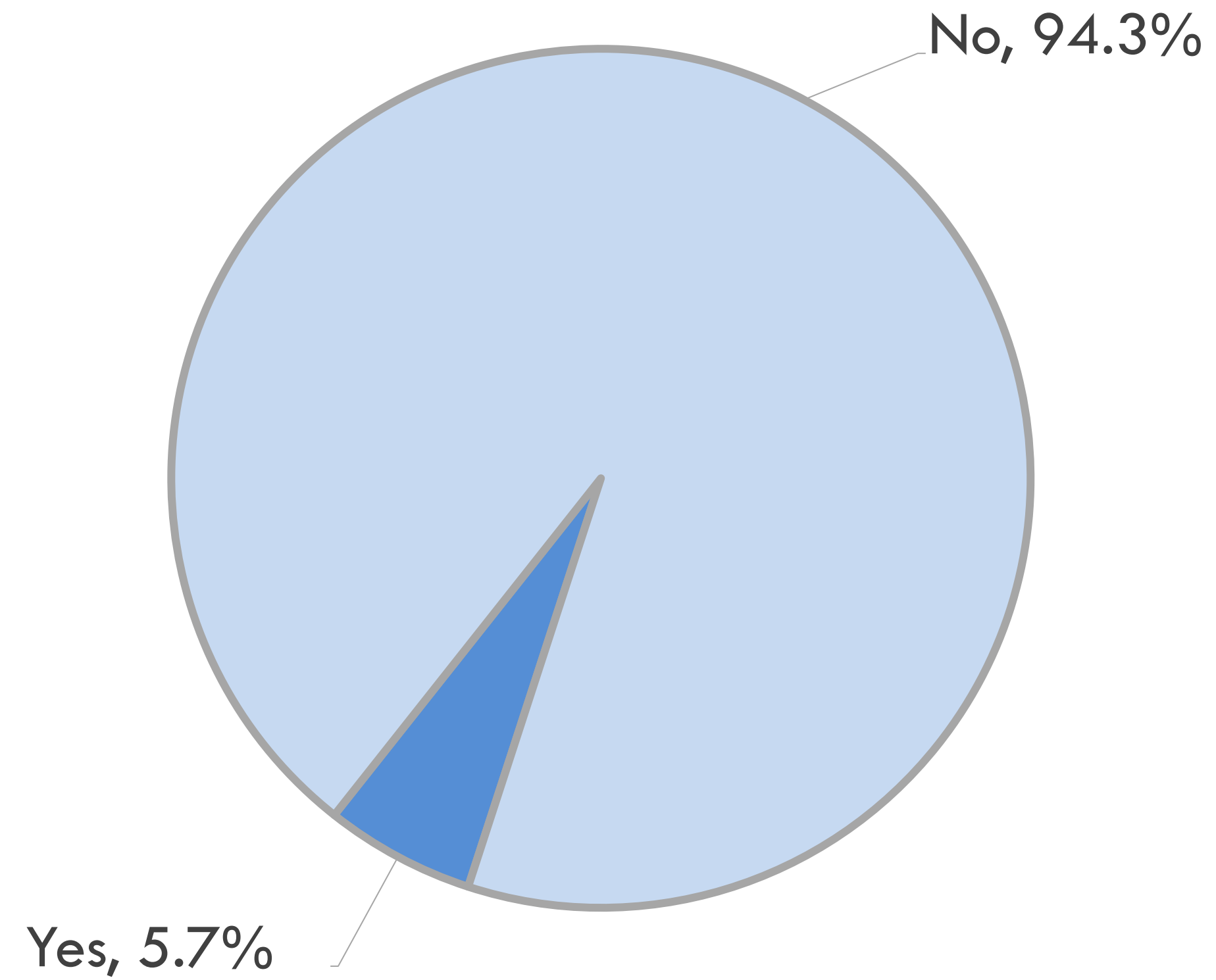
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected Jan 1-3, 2020)



HAVE THEY RECEIVED A VACCINE?

Question: Have you received a COVID-19 vaccine?

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

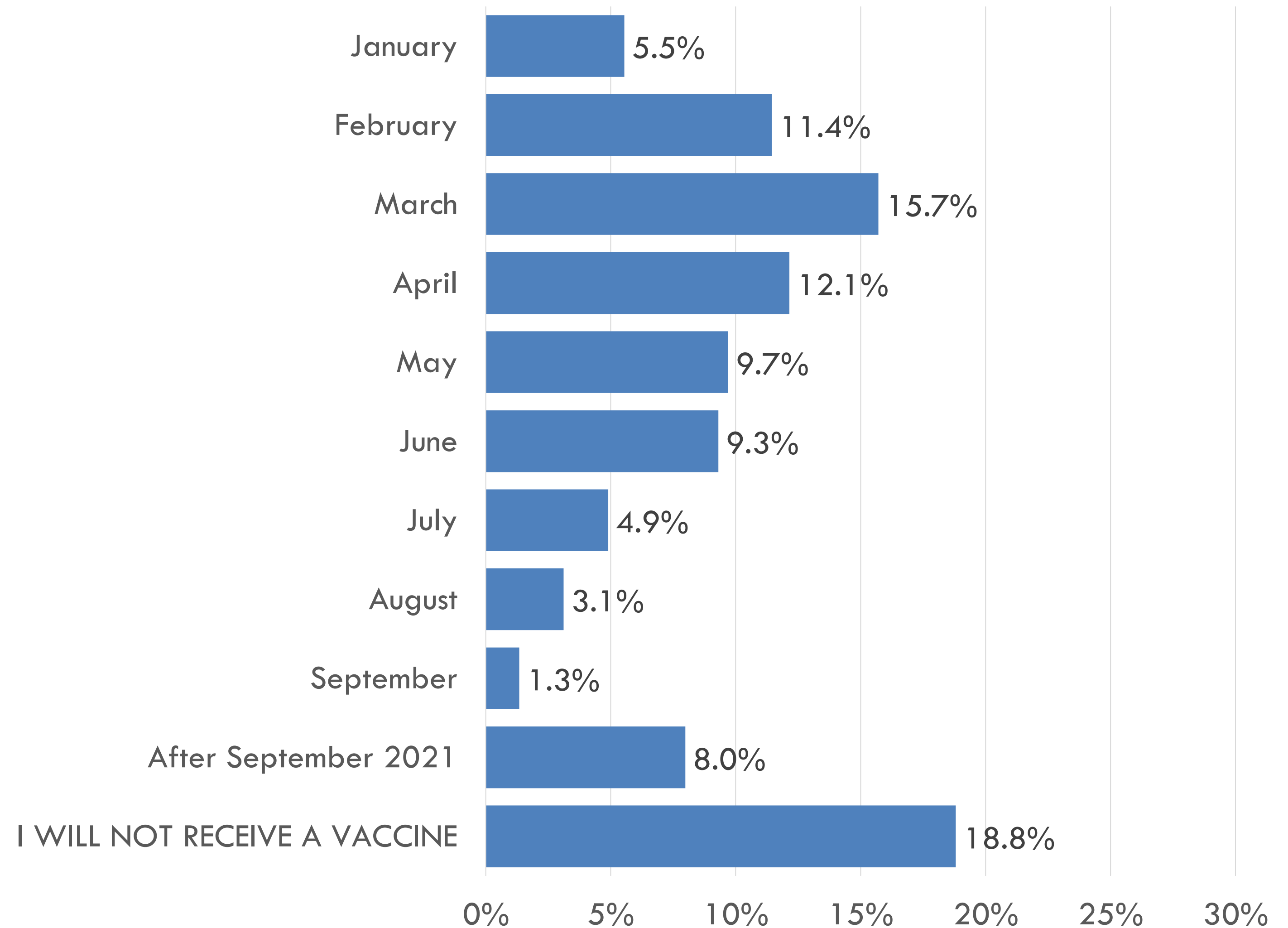


EXPECTED MONTH OF VACCINATION

Question: Given what you know now, in which month do you expect to receive a vaccine? (Select one)

(If you are uncertain, select the month you think it is **MOST LIKELY** you will get a vaccination)

(Base: Waves 43 data. Respondents who have not yet been vaccinated, 1,143 completed surveys. Data collected January 1-3, 2021)



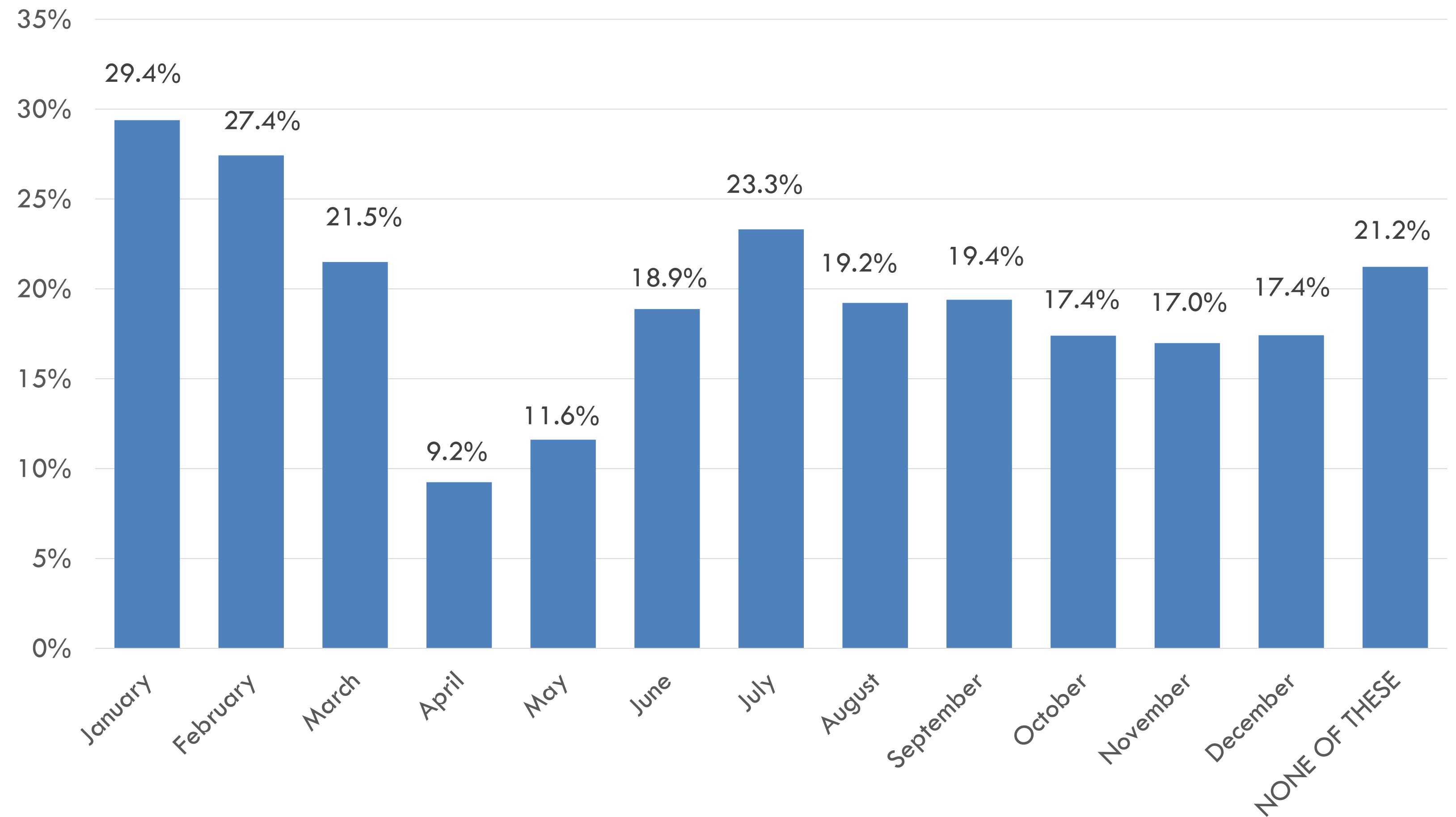


FUTURE TRAVEL

MONTHS TRIPS WERE TAKEN IN 2020

Question: In which month(s) of 2020 did you travel for any reason?
(Select all the months you traveled)

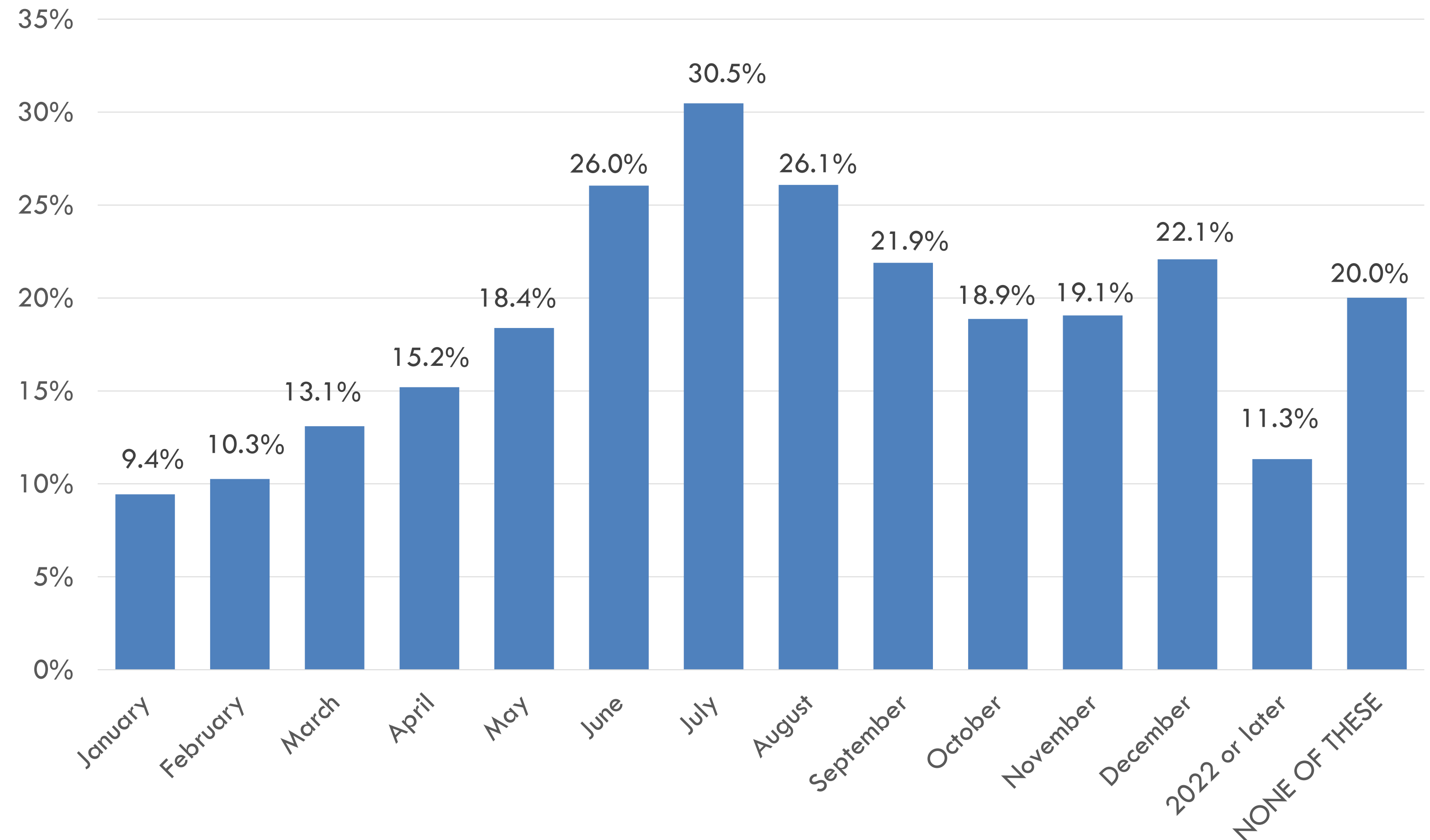
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



MONTHS OF EXPECTED LEISURE TRIPS IN 2021

Question: Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (Select all that apply)

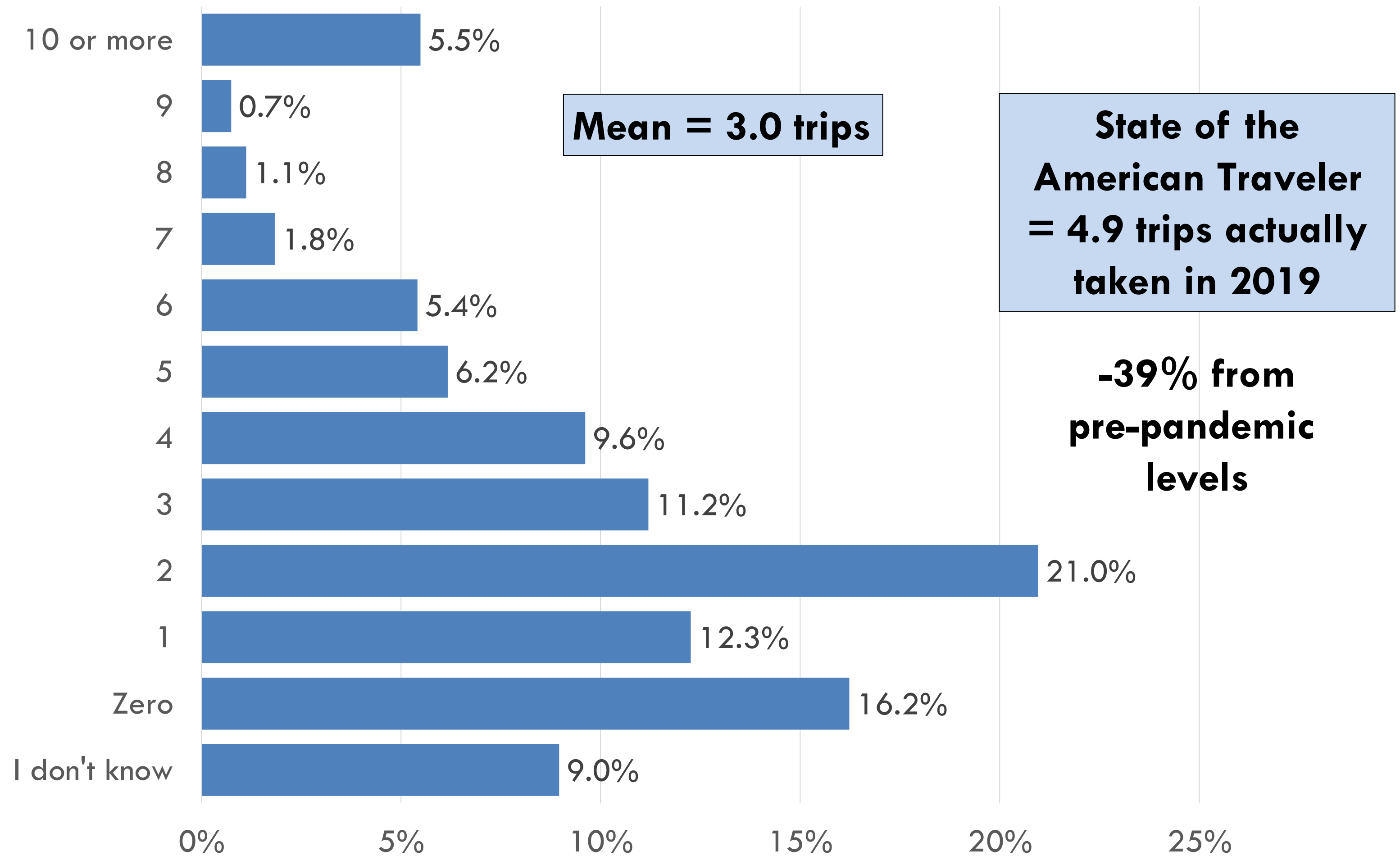
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



EXPECTED NUMBER OF LEISURE TRIPS IN 2021

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in 2021? (Select one)

(Base: Waves 43 data. All respondents, 1,094 completed surveys. Data collected January 1-3, 2021)

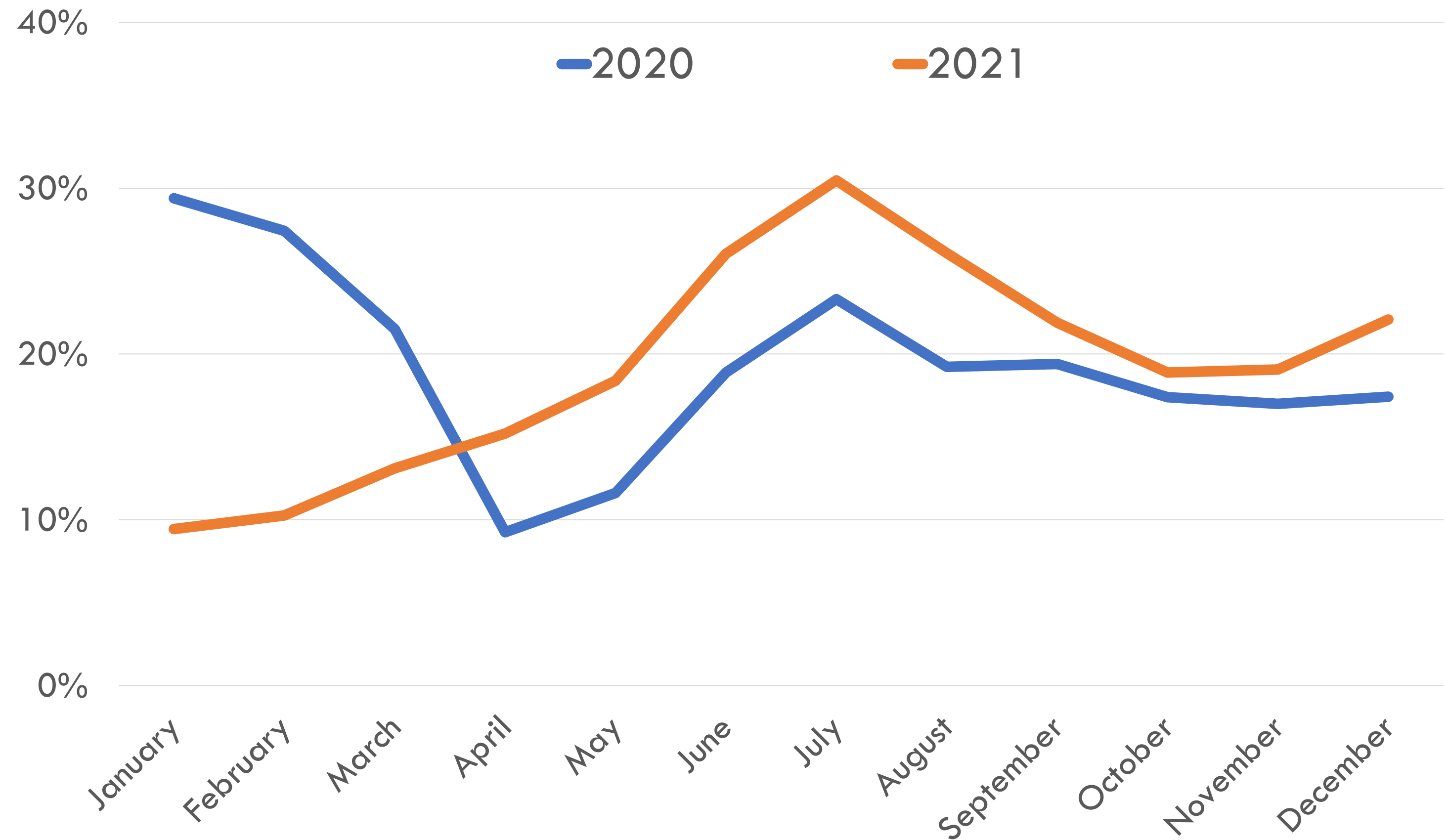


2020 MONTHS OF TRAVEL VS. 2021 MONTHS OF EXPECTED LEISURE TRAVEL

Question: In which month(s) of 2020 did you travel for any reason?
(Select all the months you traveled)

Question: Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (Select all that apply)

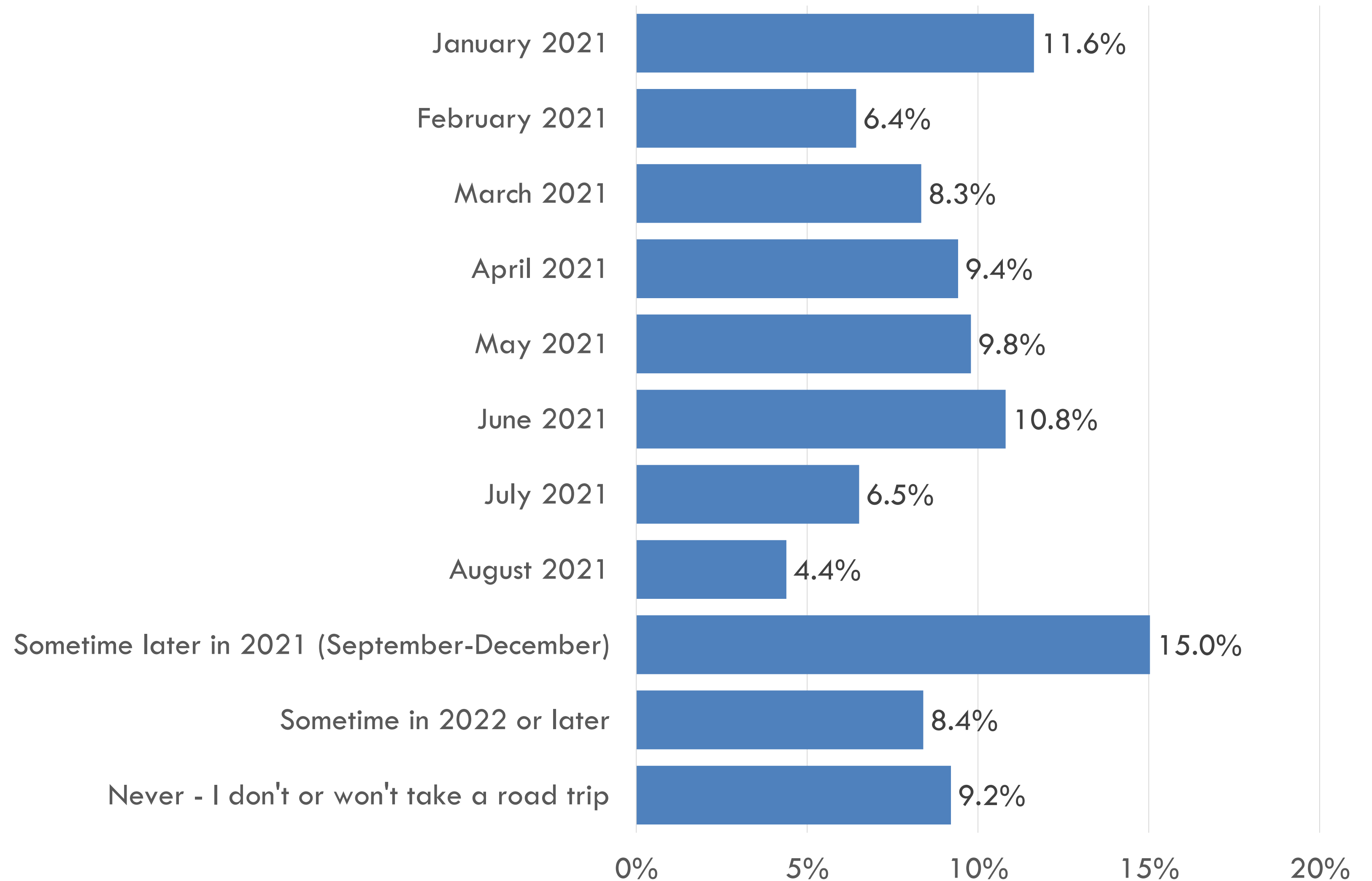
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



MONTH OF NEXT ROAD TRIP

Question: In what month do you expect you will take your NEXT ROAD TRIP (Traveling in a personal automobile)?

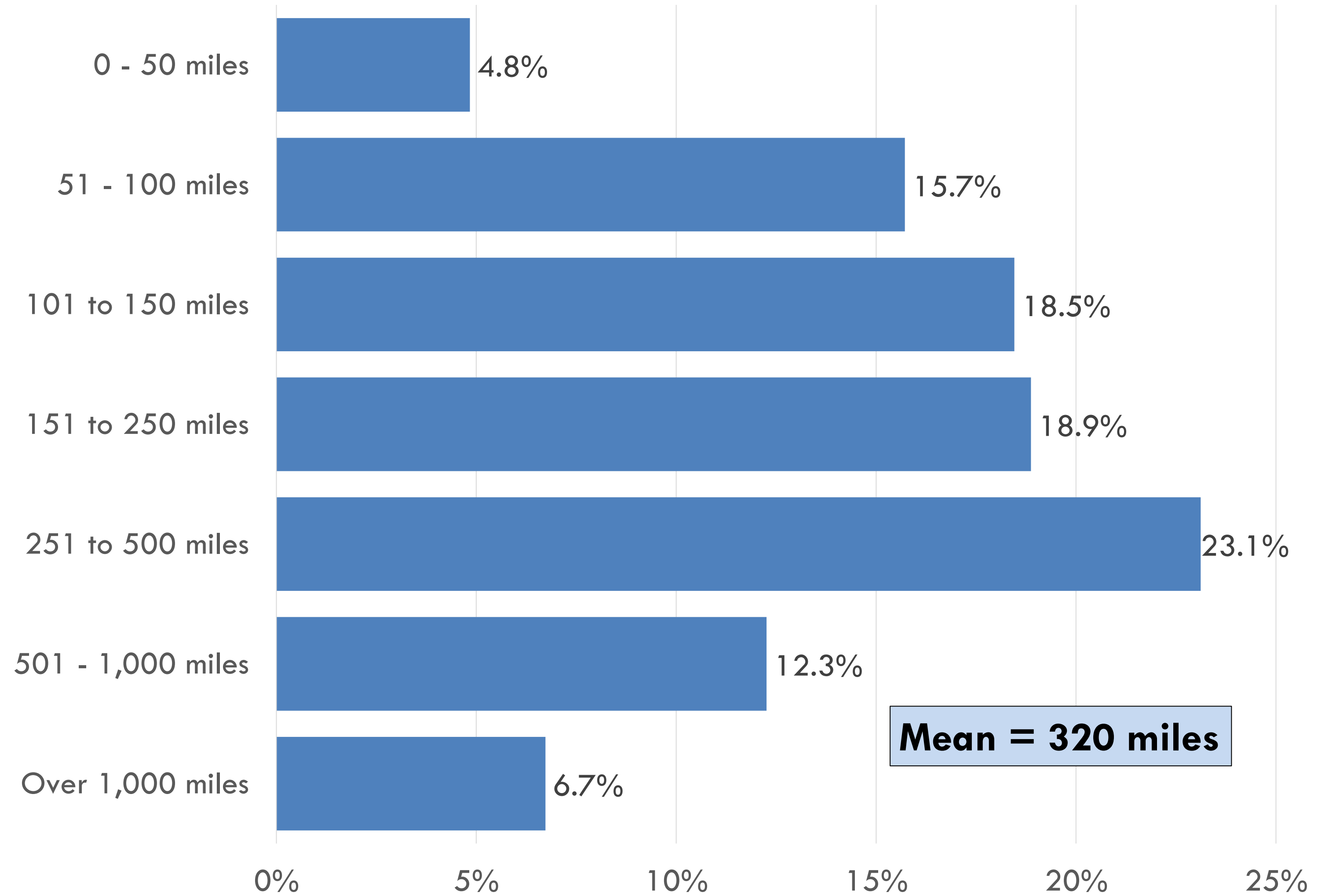
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



NEXT ROAD TRIP: DISTANCE FROM HOME

Question: On your next ROAD TRIP, how far away from home will you be likely to travel?

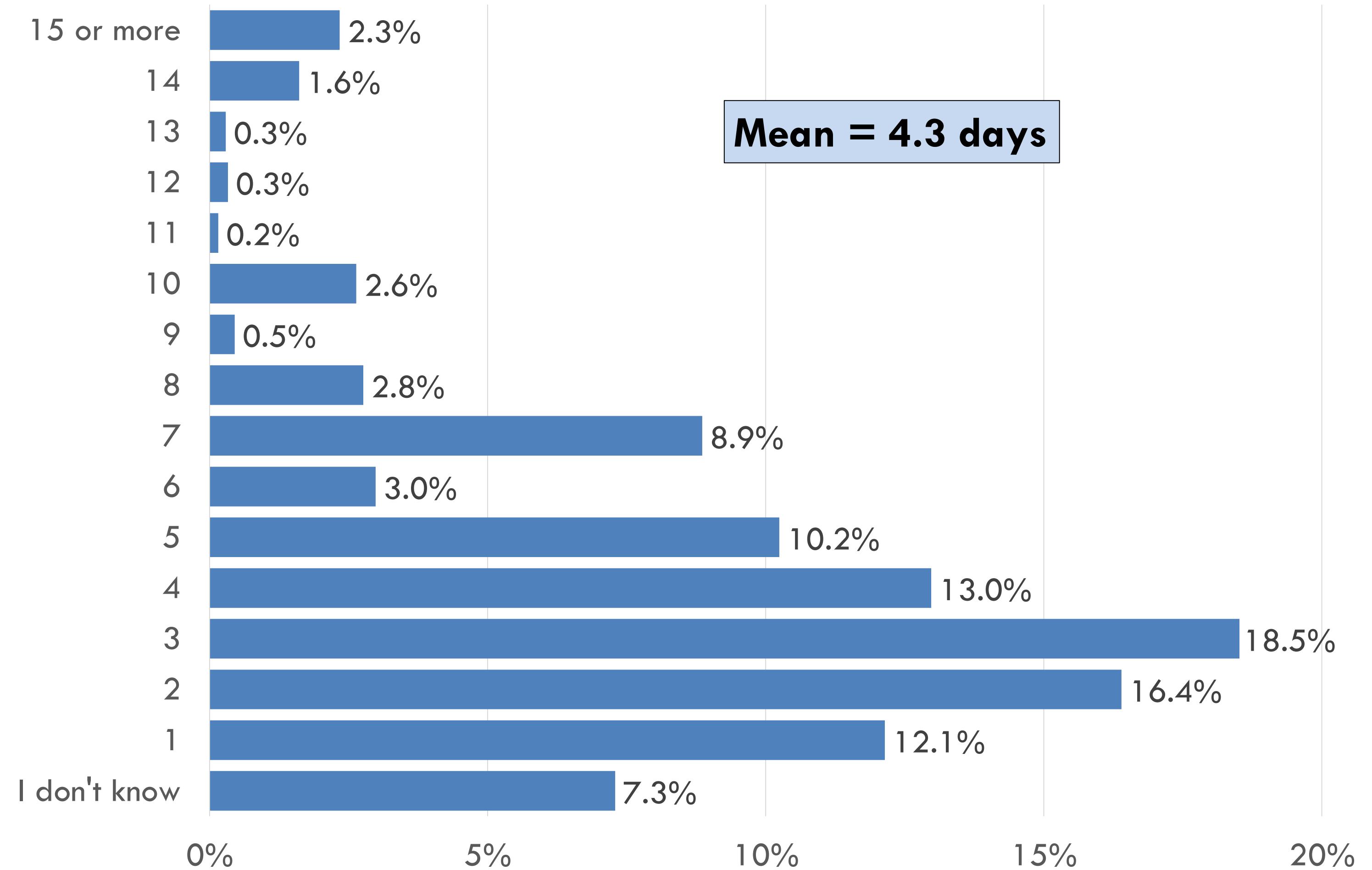
(Base: Waves 43 data. All respondents taking road trips, 1,098 completed surveys. Data collected January 1-3, 2021)



NEXT ROAD TRIP: LENGTH OF TRIP

Question: On your next ROAD TRIP, how many days away from home do you expect to spend? (Select one)

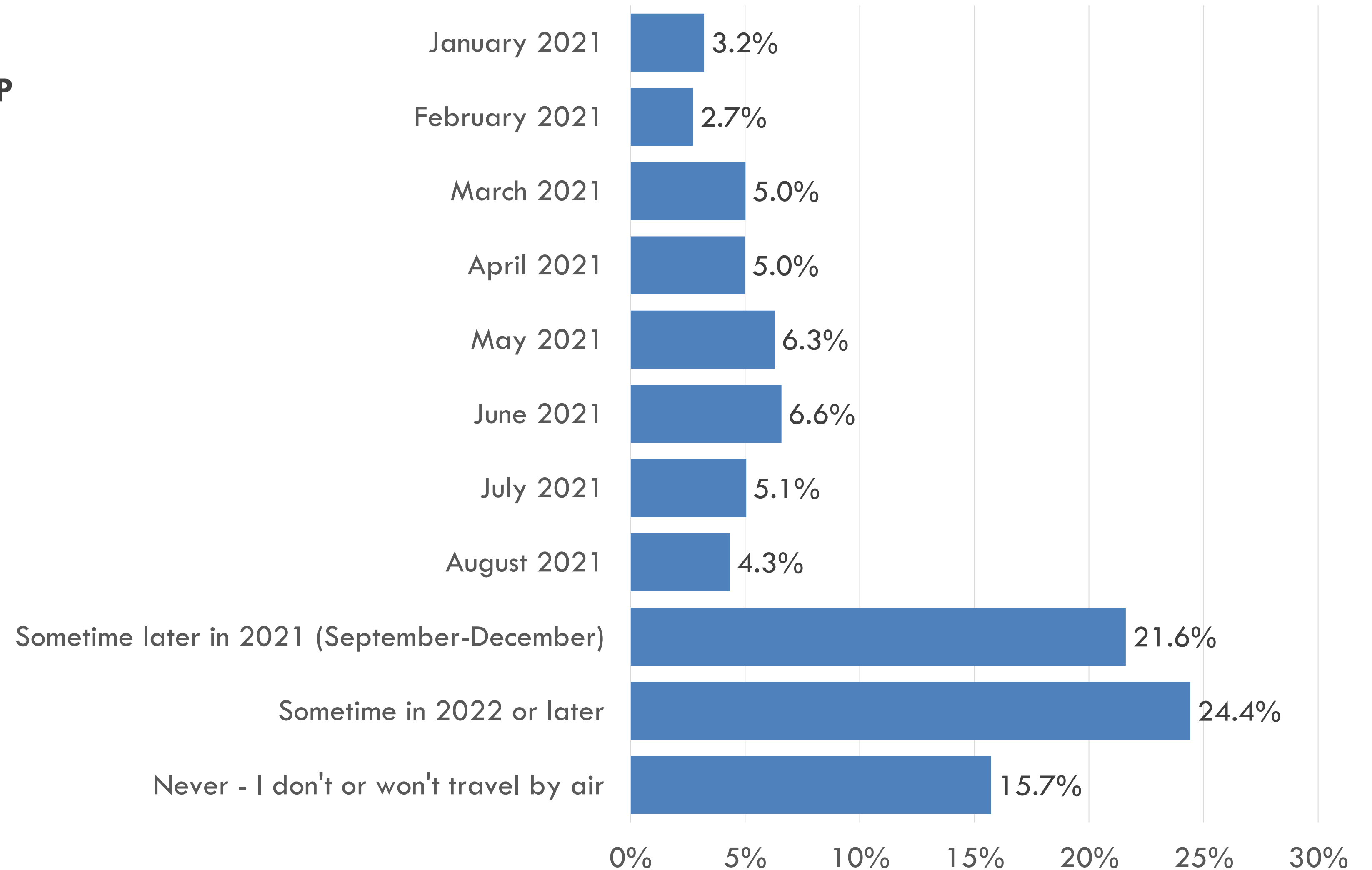
(Base: Waves 43 data. All respondents taking road trips, 1,020 completed surveys. Data collected January 1-3, 2021)



MONTH OF NEXT COMMERCIAL AIRLINE FLIGHT

Question: In what month do you expect you will take your NEXT TRIP ON A COMMERCIAL AIRLINE?

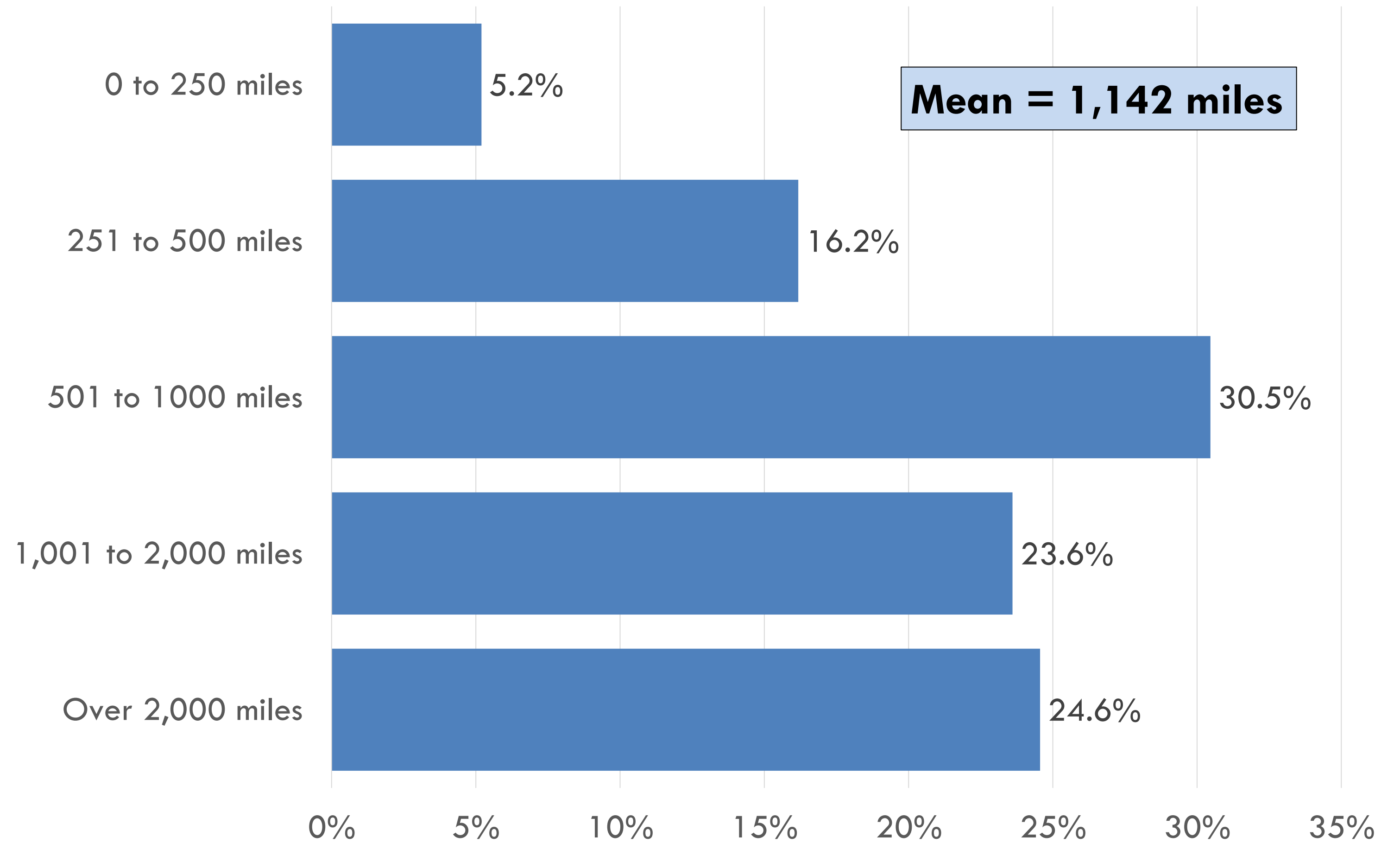
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



NEXT COMMERCIAL AIRLINE TRIP: DISTANCE FROM HOME

Question: On your next TRIP ON A COMMERCIAL AIRLINE, how far away from home will you be likely to travel?

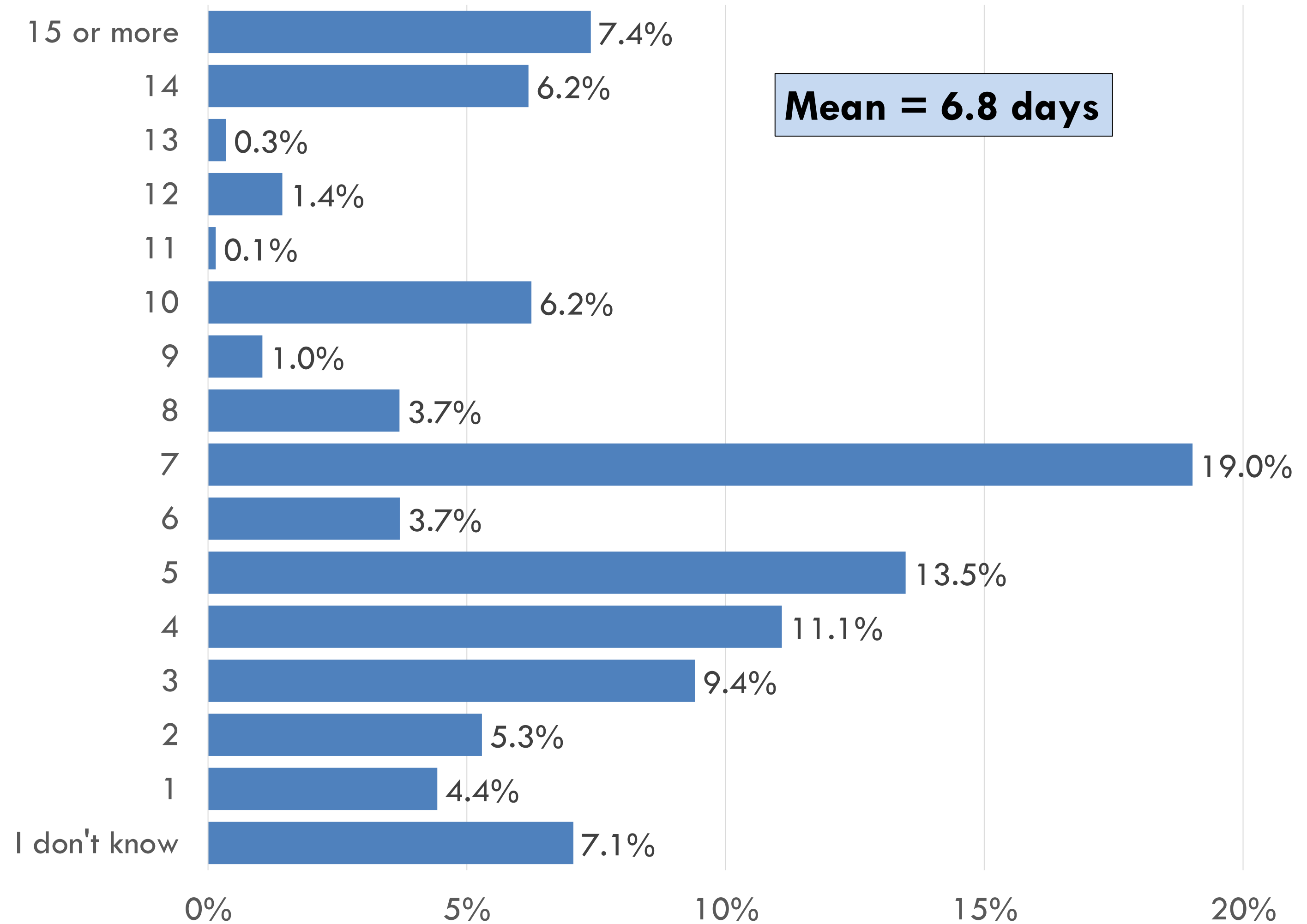
(Base: Waves 43 data. All respondents taking commercial airline trips, 1,009 completed surveys. Data collected January 1-3, 2021)



NEXT COMMERCIAL AIRLINE TRIP: LENGTH OF TRIP

Question: On your next TRIP ON A COMMERCIAL AIRLINE, how many days away from home do you expect to spend? (Select one)

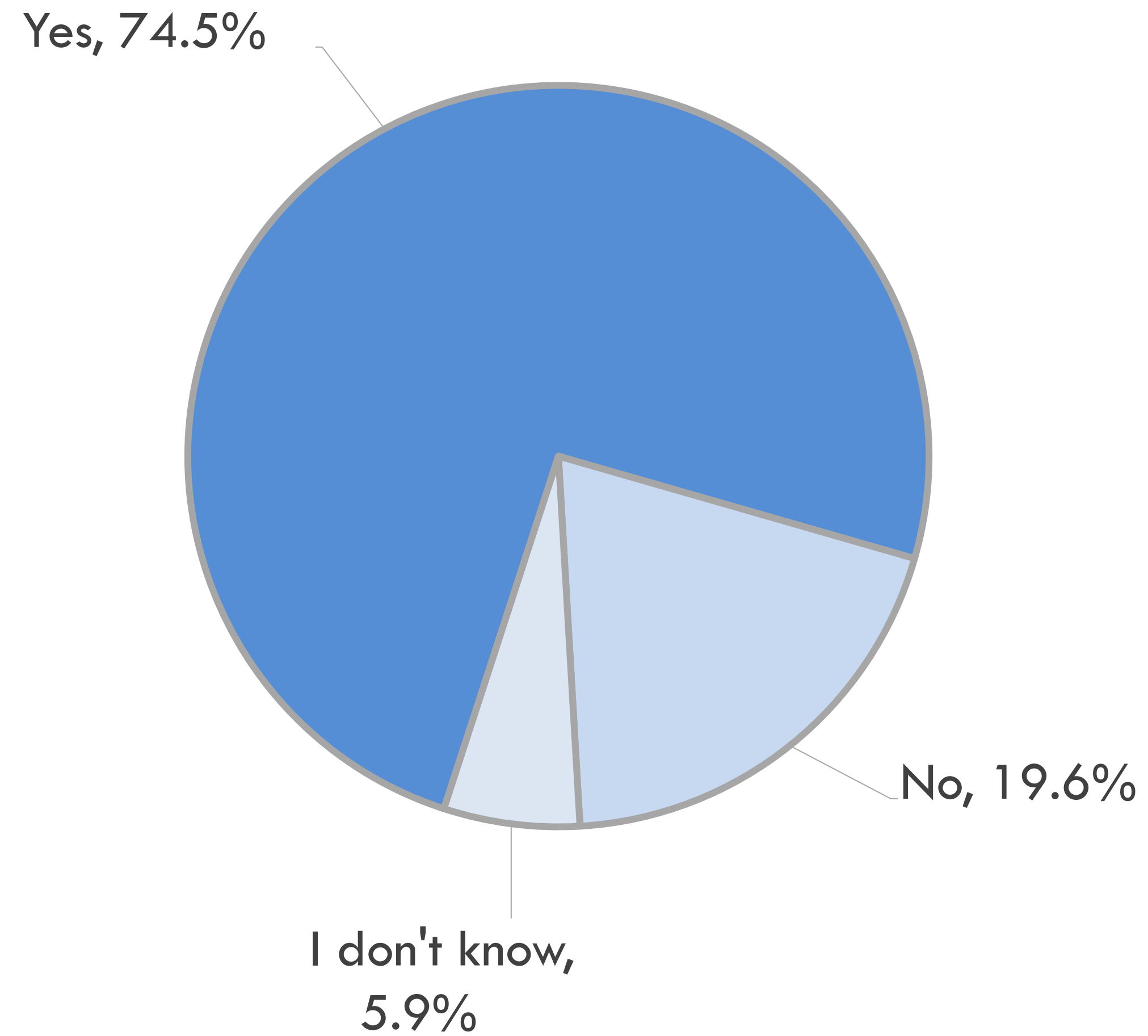
(Base: Waves 43 data. All respondents taking a commercial airline trip, 940 completed surveys. Data collected January 1-3, 2021)



HAS PANDEMIC CHANGED NORMAL LEISURE TRAVEL PATTERNS

Question: Has the COVID-19 pandemic changed your normal leisure travel patterns in any way?
(Select one)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



A close-up shot of a car's side-view mirror. The mirror's frame is dark and rounded. The reflection inside the mirror shows a landscape at sunset or sunrise. A large, dark silhouette of a palm tree is on the left side of the reflection. The sun is a bright, glowing orb on the horizon to the right, casting a warm, orange and yellow glow across the sky and the horizon line. The background outside the mirror is dark and out of focus, suggesting a night or dusk setting.

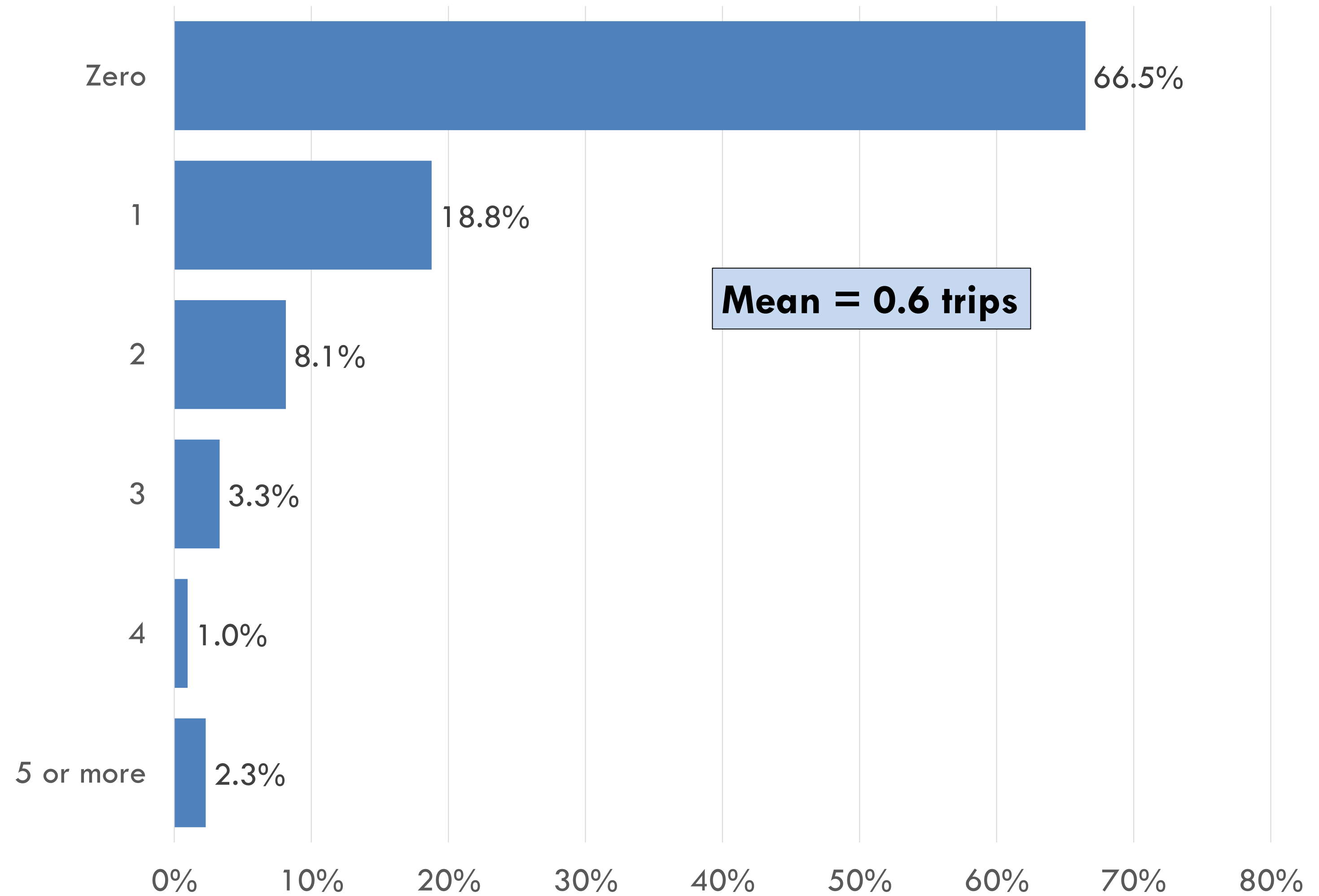
LEISURE TRIPS IN THE PAST 3 MONTHS

LEISURE TRIPS TAKEN (PAST 3 MONTHS)

Question: In the **MOST RECENT THREE (3) MONTHS**, how many total leisure trips did you take? (Select one to fill in the blank)

I took _____ leisure trips.

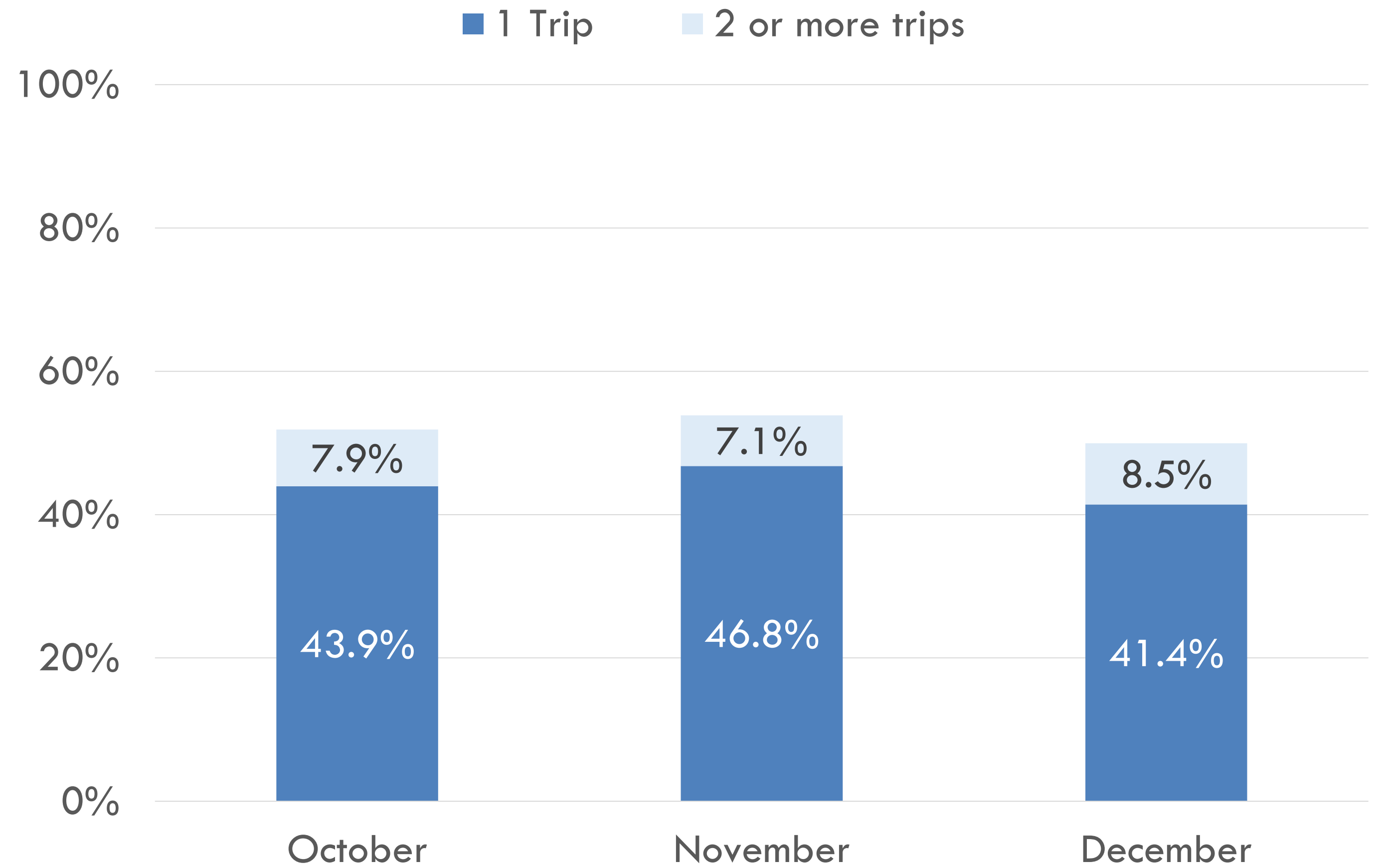
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



LEISURE TRIPS TAKEN (BY MONTH)

Question: How many leisure trips did you take in each of these **MOST RECENT THREE MONTHS?** (Select the number of trips you took in each month)

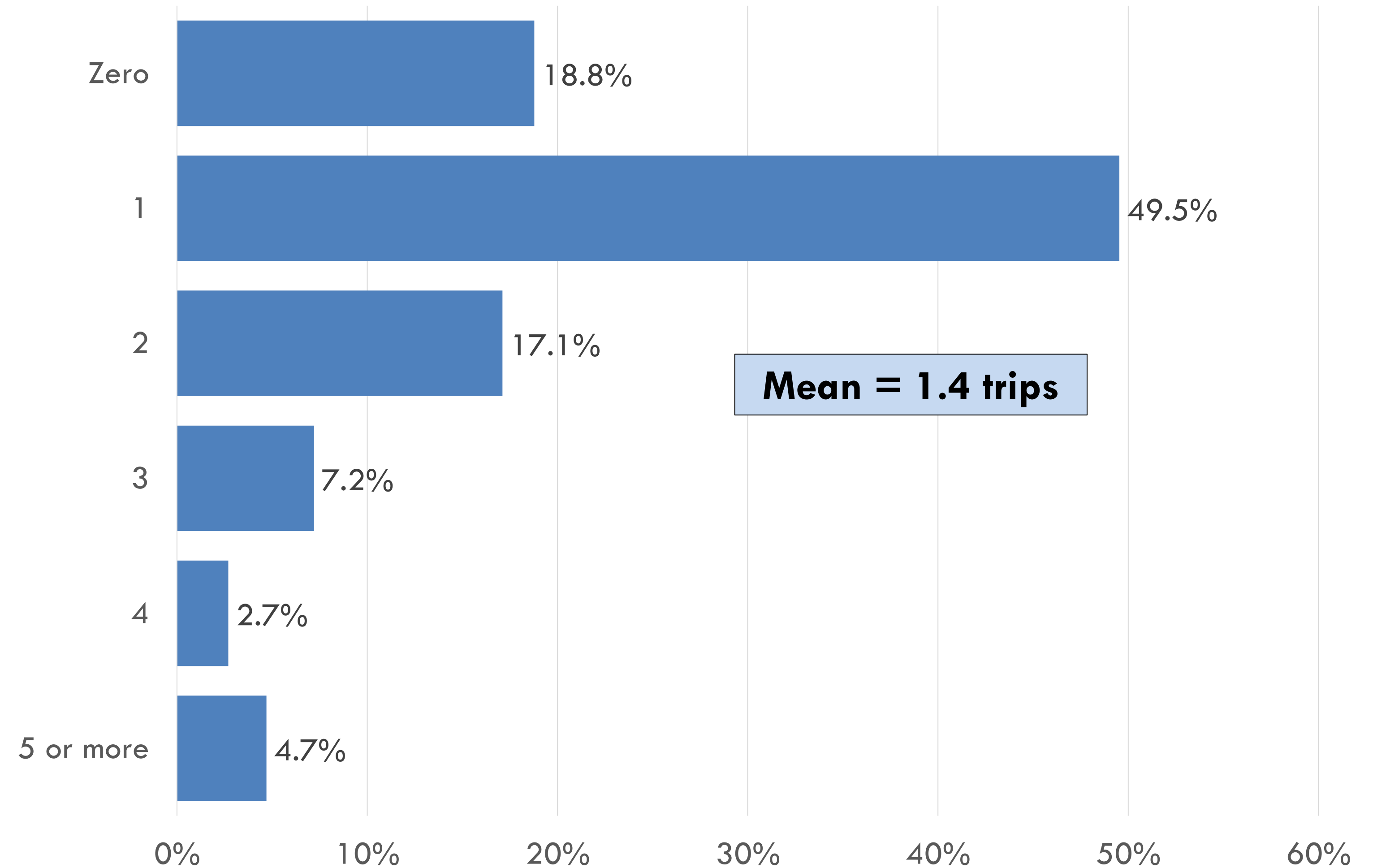
(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 403 completed surveys. Data collected January 1-3, 2021)



NUMBER OF OVERNIGHT LEISURE TRIPS (PAST 3 MONTHS)

Question: How many of these leisure trips were **OVERNIGHT TRIPS** (i.e., trips including at least one night away from your home)?

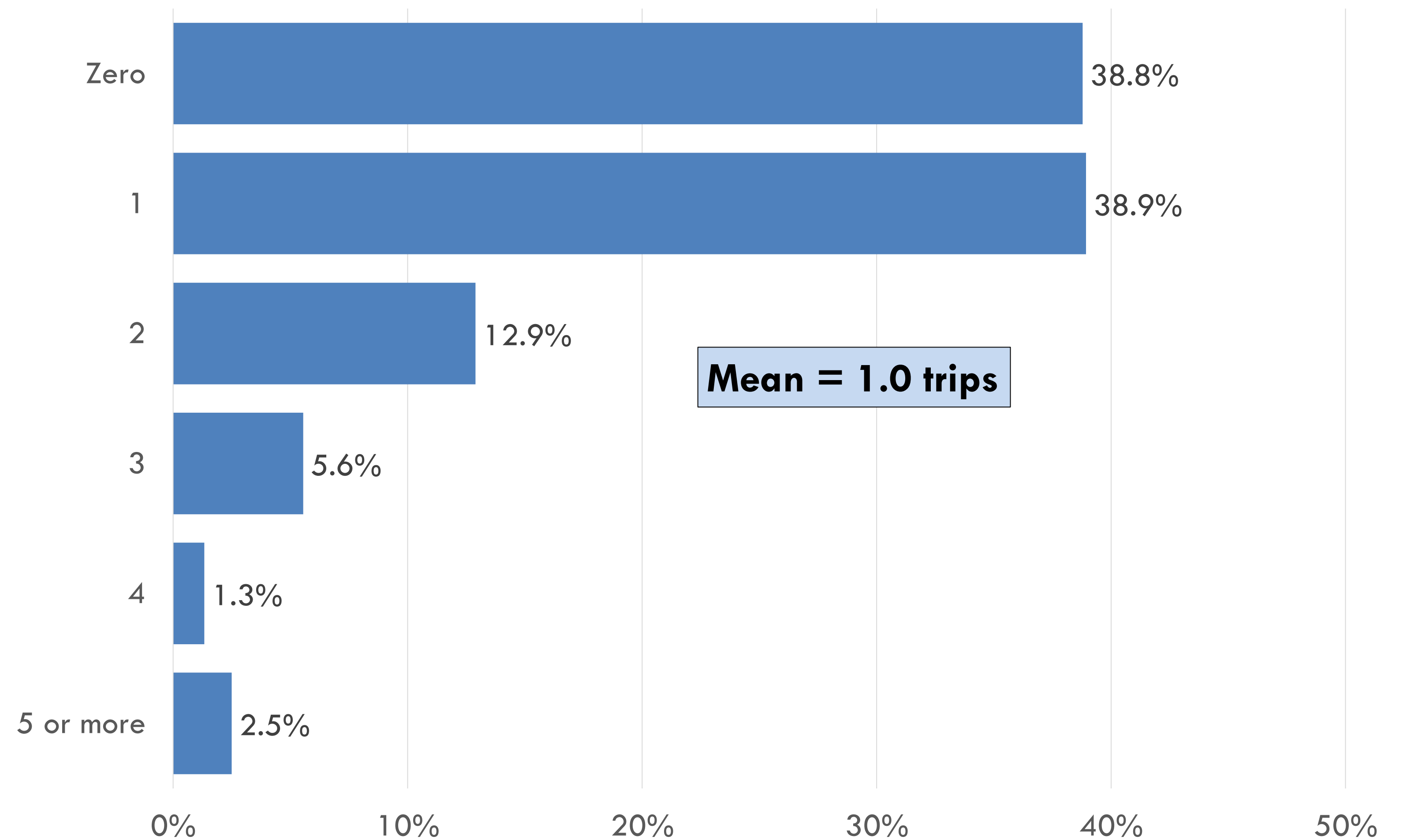
(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 403 completed surveys. Data collected January 1-3, 2021)



NUMBER OF REGIONAL TRIPS (PAST 3 MONTHS)

Question: How many of these leisure trips were **REGIONAL TRIPS** (travel less than 250 miles from home) away from home?

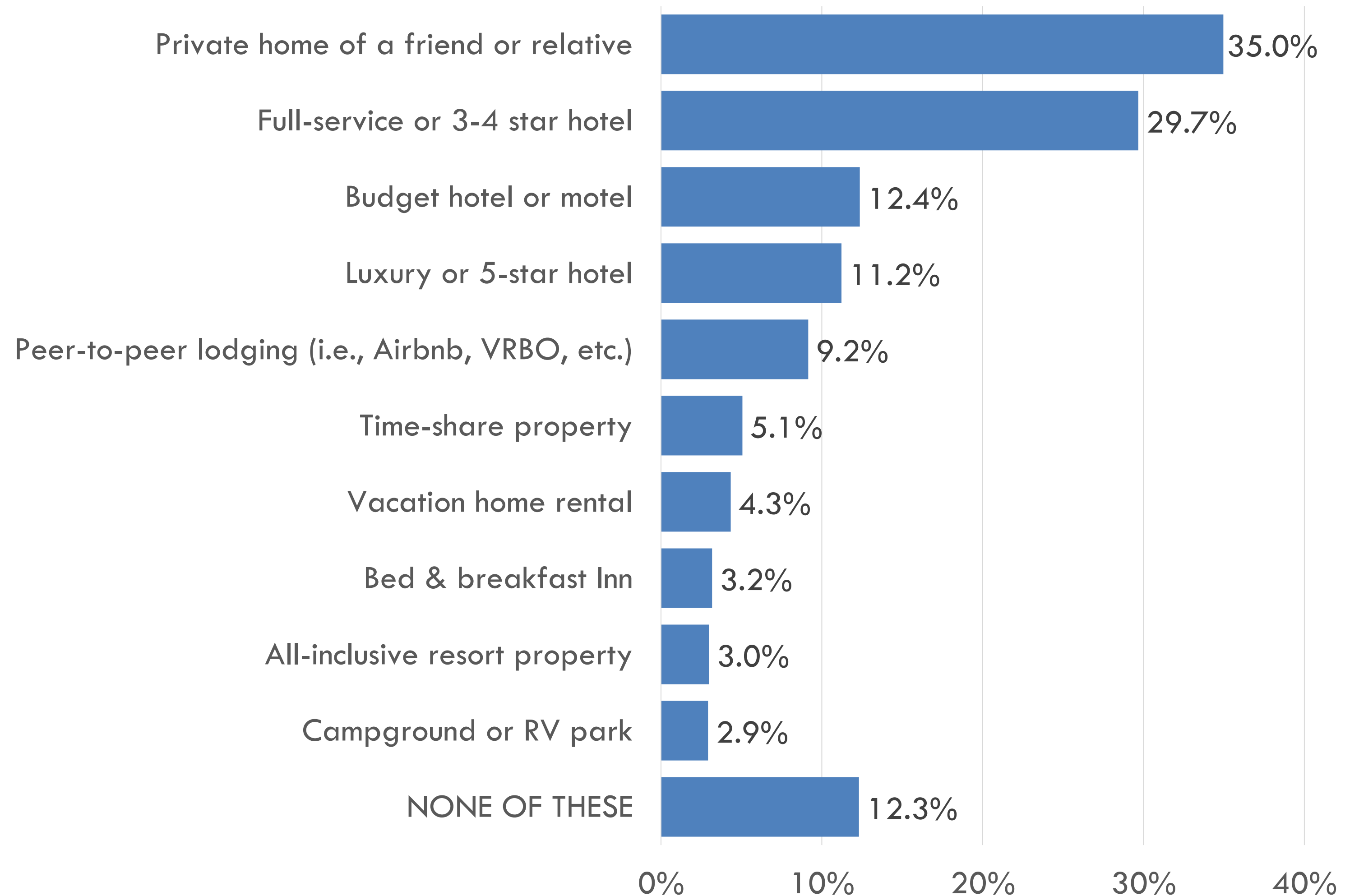
(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 403 completed surveys. Data collected January 1-3, 2021)



PLACES OF STAY ON LEISURE TRIPS (PAST 3 MONTHS)

Question: On these leisure trips, in which of the following did you stay overnight?

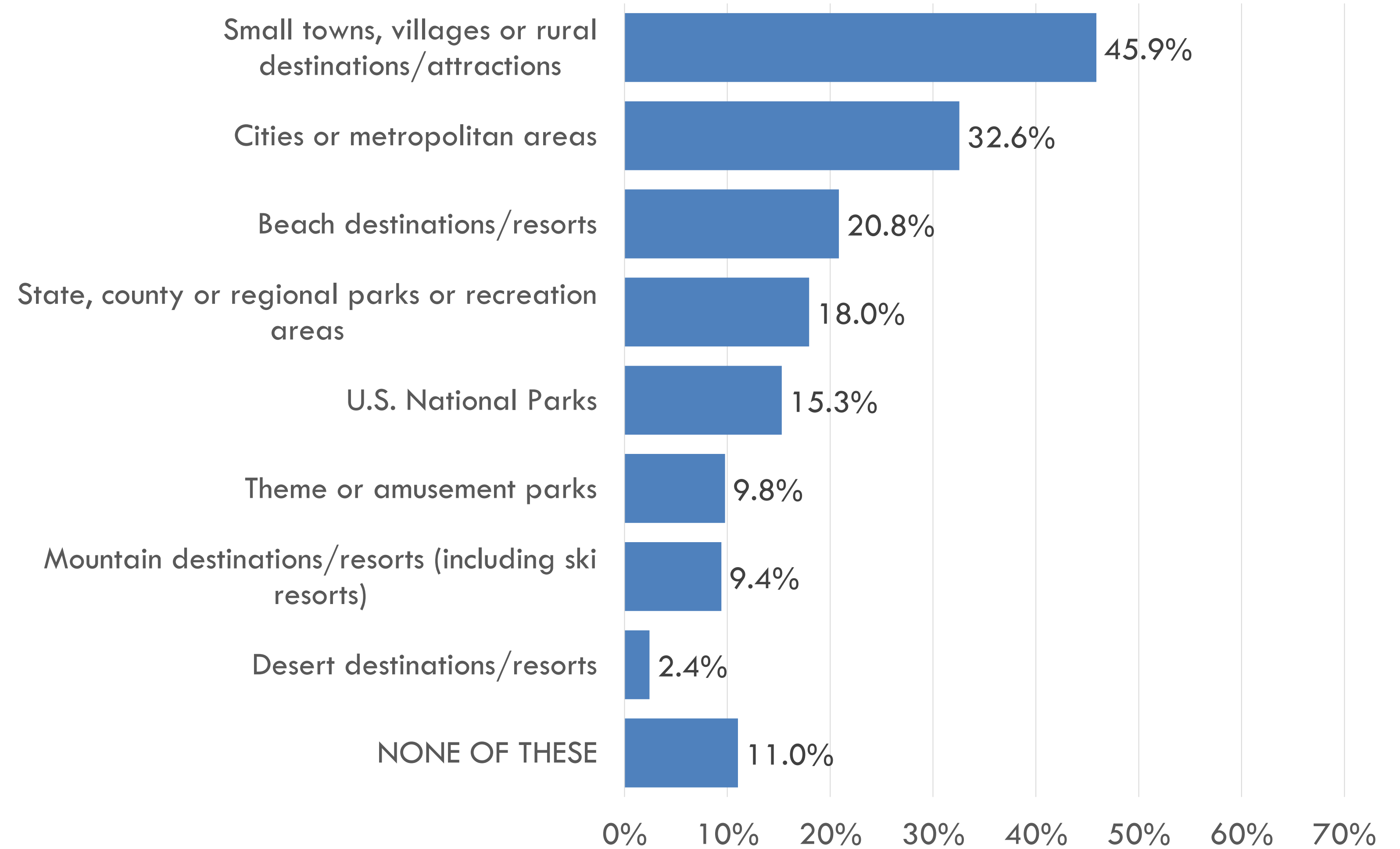
(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 403 completed surveys. Data collected January 1-3, 2021)



DESTINATION TYPES VISITED ON LEISURE TRIPS (PAST 3 MONTHS)

Question: On these leisure trips, which of the following did you visit?

(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 403 completed surveys. Data collected January 1-3, 2021)

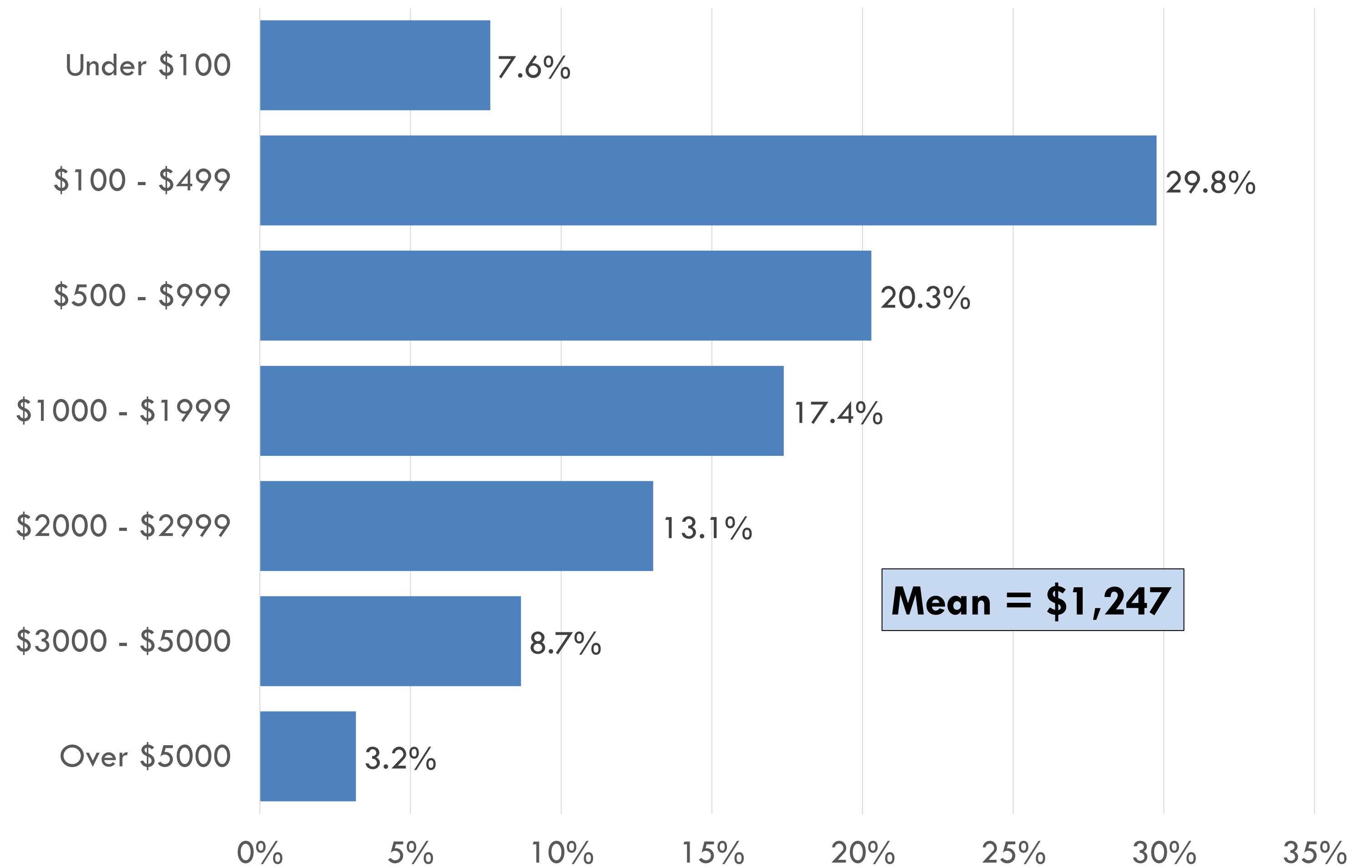


LEISURE TRAVEL SPENDING (PAST 3 MONTHS)

Question: How much IN TOTAL did you spend on the leisure trips you took in the most recent three-month period (October 1 to December 31)?

(Include spending for all the trips you took, including lodging, transportation, food, shopping, entertainment, etc.)

(Base: Waves 43 data. Respondents who took a leisure trip in the past three months, 397 completed surveys. Data collected January 1-3, 2021)



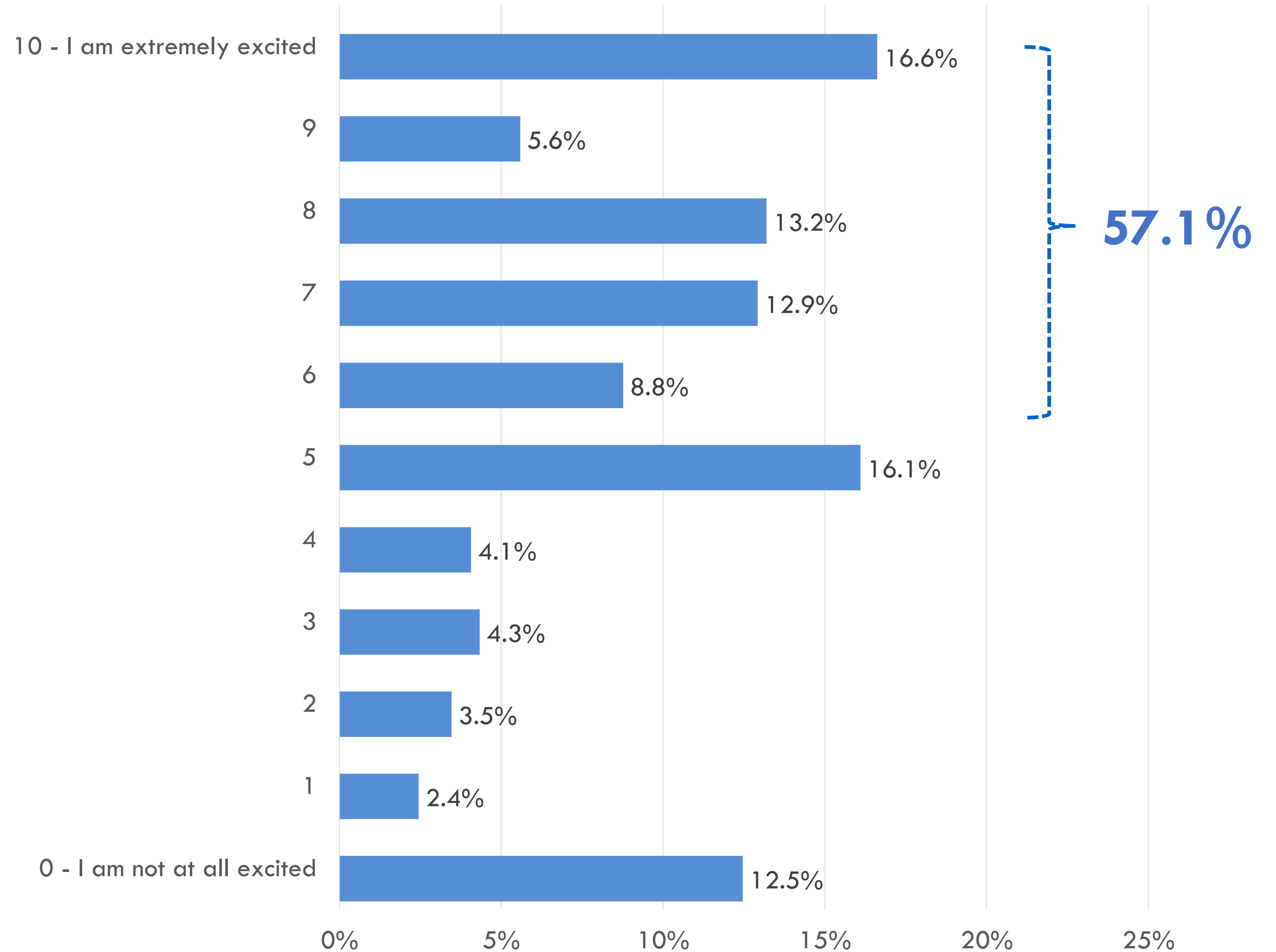


LOOKING AHEAD

EXCITEMENT ABOUT TRAVEL IN 2021

Question: Which best describes how excited you are about LEISURE TRAVEL this upcoming year (2021)?

(Base: Wave 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

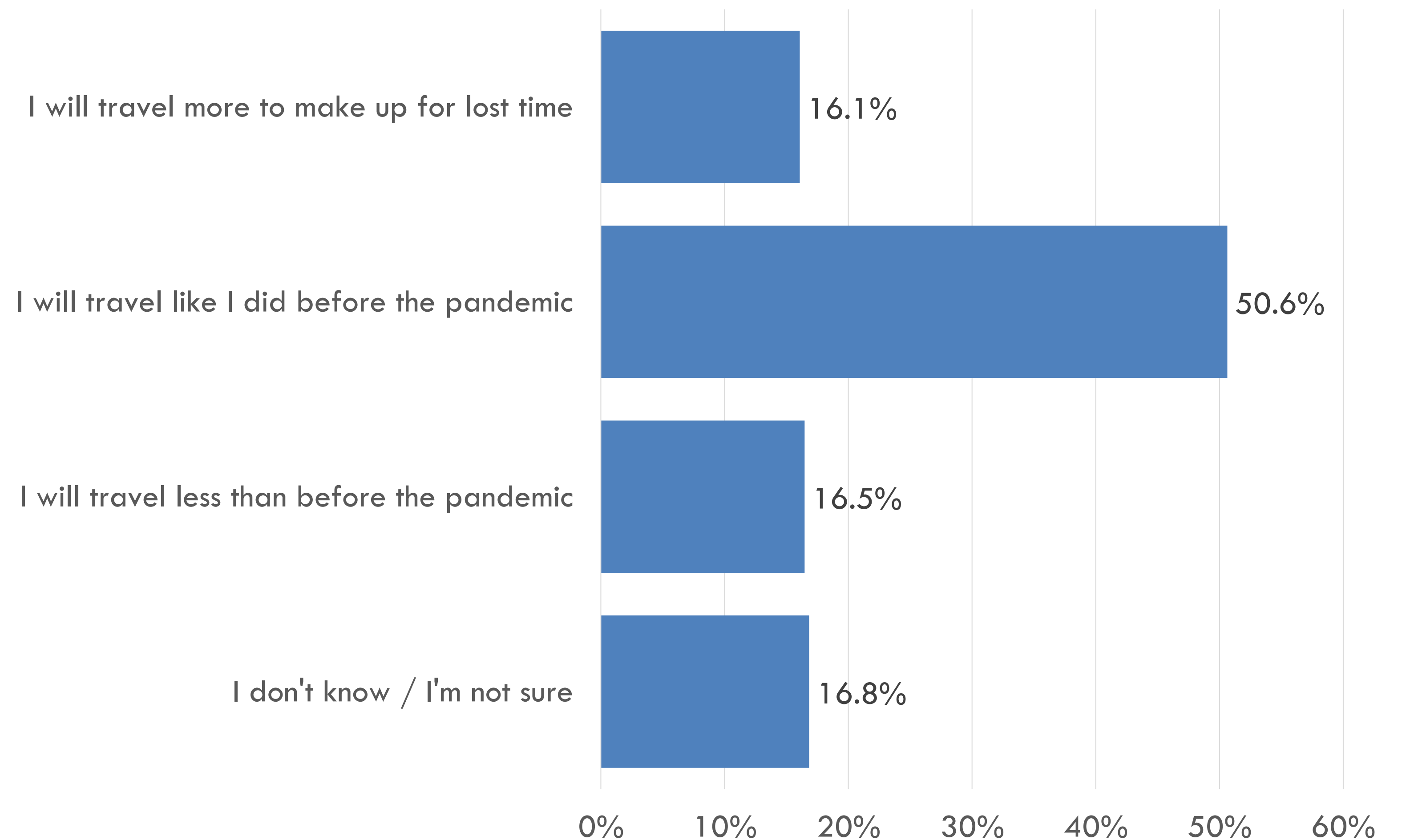


FUTURE TRAVEL EXPECTATIONS

Question: Please tell us how you're looking at the future right now.

Which best describes how you will approach leisure travel as life returns to normalcy (or near normalcy) after the COVID-19 pandemic?

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

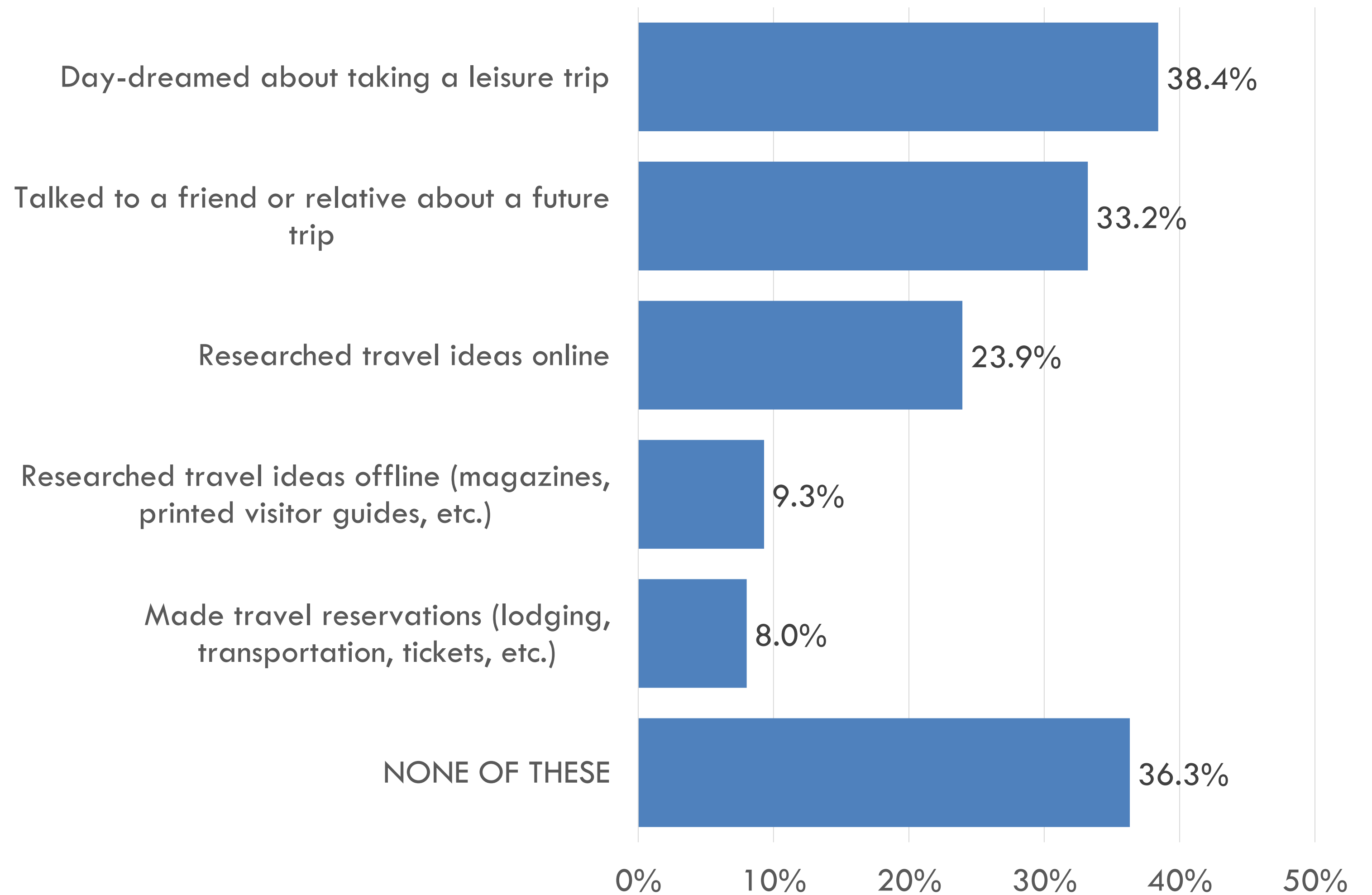


TRAVEL PLANNING IN THE PAST WEEK

Question: In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have

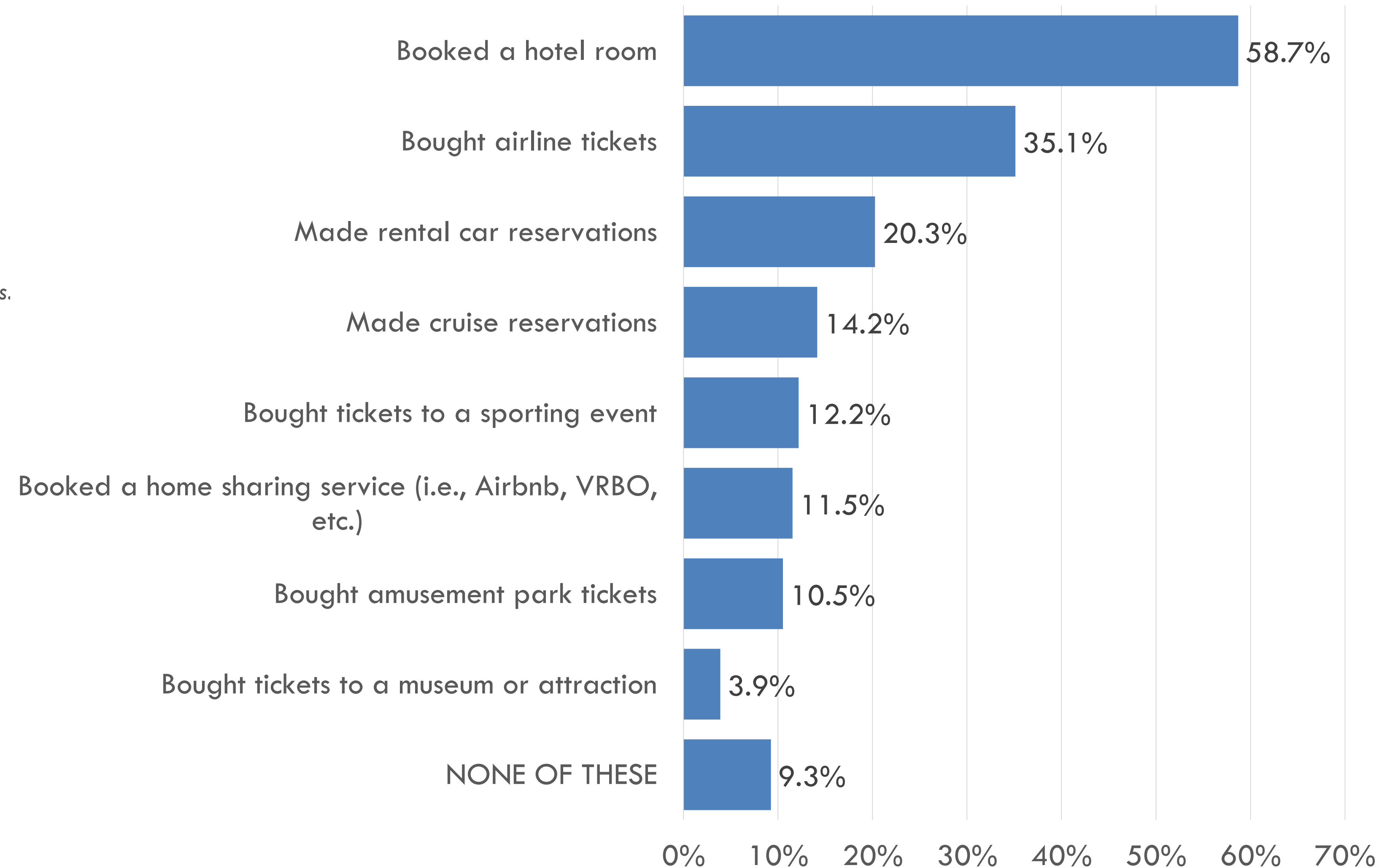
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



TRAVEL RESERVATIONS MADE IN THE PAST WEEK

Question: Which of these travel reservations did you make this week? (Select all that apply)

(Base: Waves 43 data. Respondents who made travel reservations this week, 94 completed surveys. Data collected January 1-3, 2021)



DESTINATIONS DREAMED ABOUT IN PAST WEEK

Question: What destination(s) did you day-dream about visiting?

(Base: Waves 43 data. Respondents who day-dreamed about taking a leisure trip in the past week, 353 completed surveys. Data collected January 1-3, 2021)



MOST DESIRED DOMESTIC DESTINATIONS

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

(Please only include destinations in the United States)

(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)

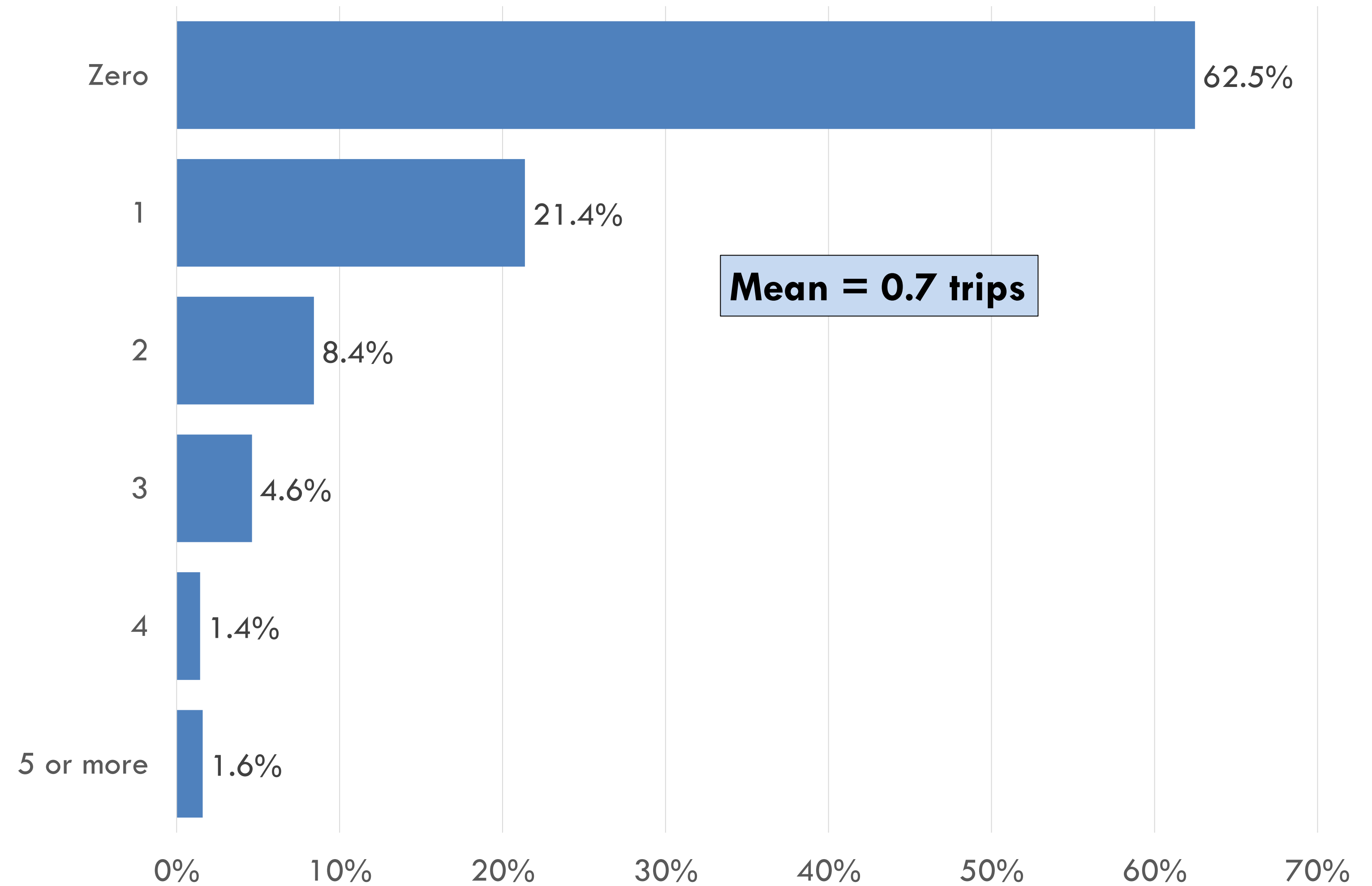


LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

Question: HOW MANY LEISURE TRIPS do you expect to take (even if tentatively) during the first three months of the year?

I expect to take _____ leisure trips

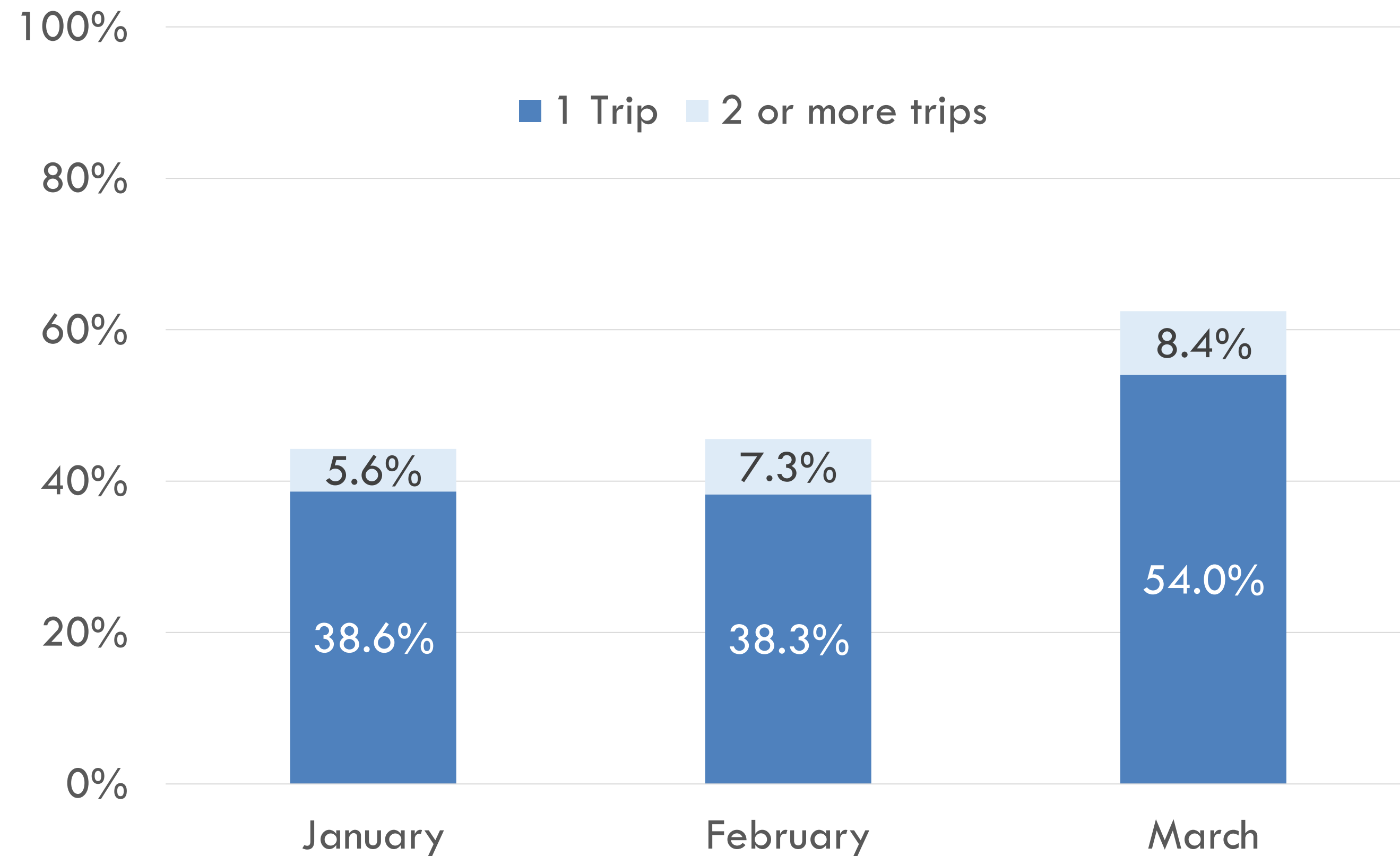
(Base: Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)



LEISURE TRIPS EXPECTED (BY MONTH)

Question: How many leisure trips do you expect to take (even if tentatively) in each of these months?

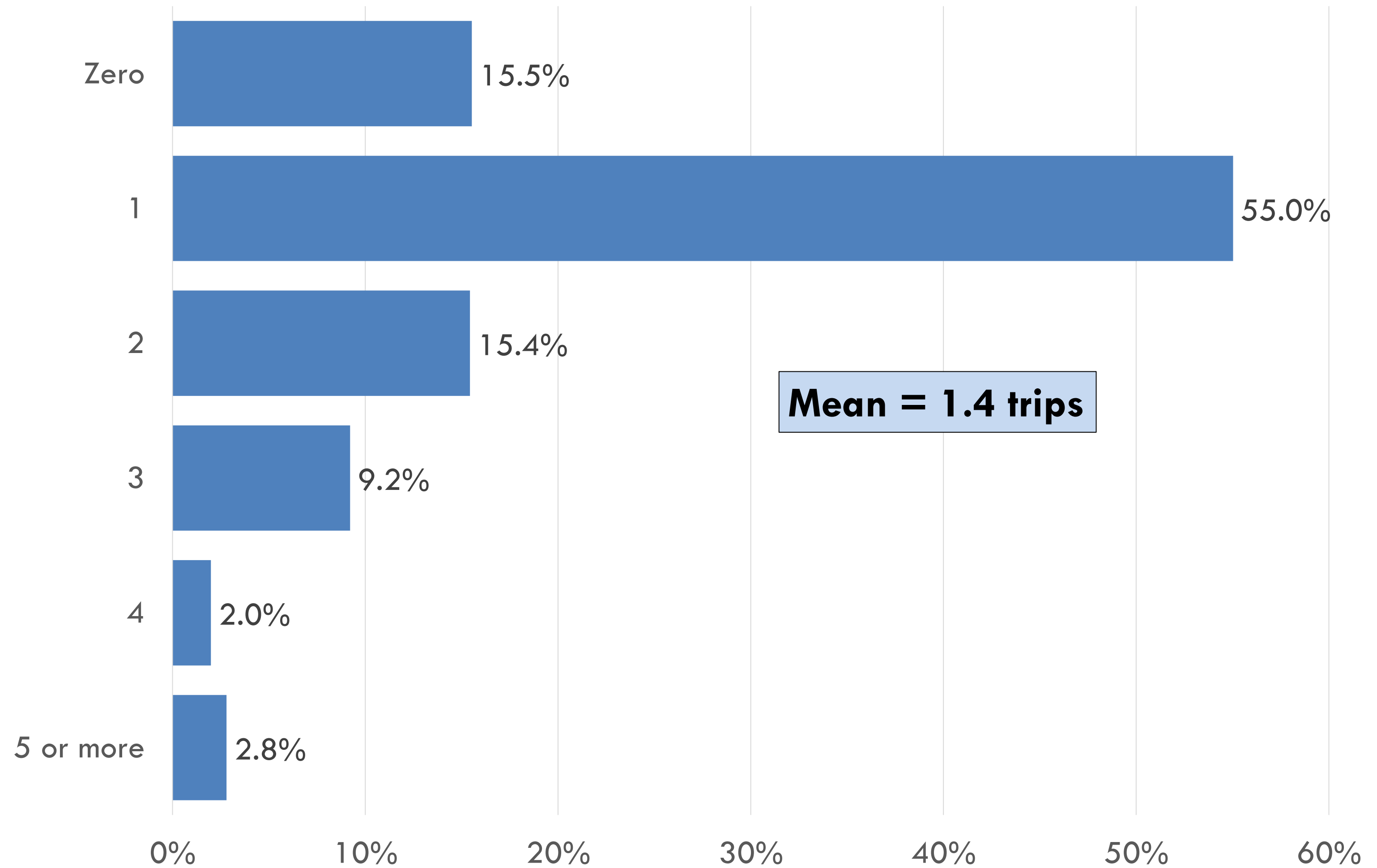
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



OVERNIGHT TRIPS EXPECTED (NEXT 3 MONTHS)

Question: How many of these leisure trips will be **OVERNIGHT TRIPS** (i.e., trips including at least one night away from your home)?

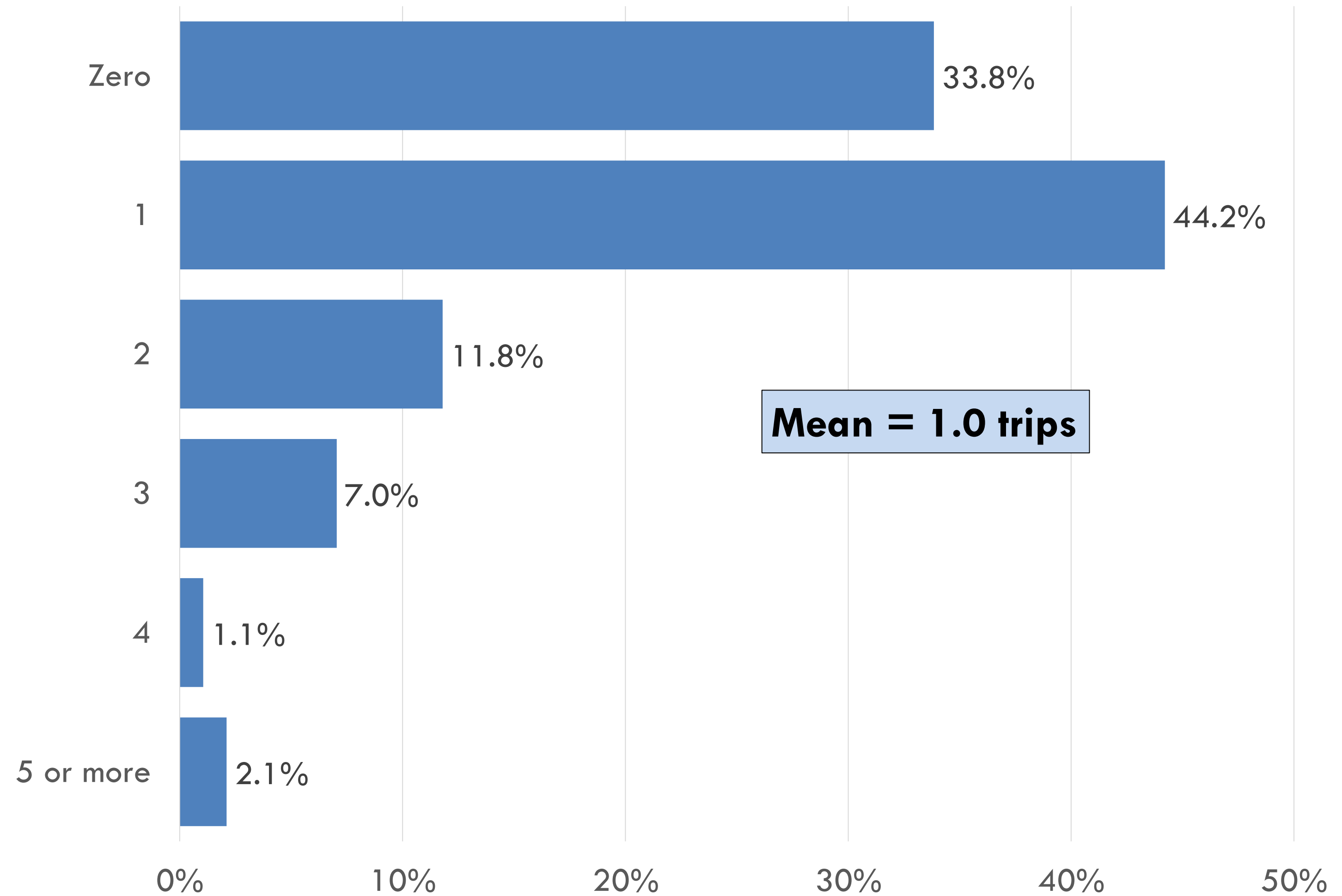
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



REGIONAL TRIPS EXPECTED (NEXT 3 MONTHS)

Question: How many of these leisure trips will be REGIONAL TRIPS (travel less than 250 miles from your home)?

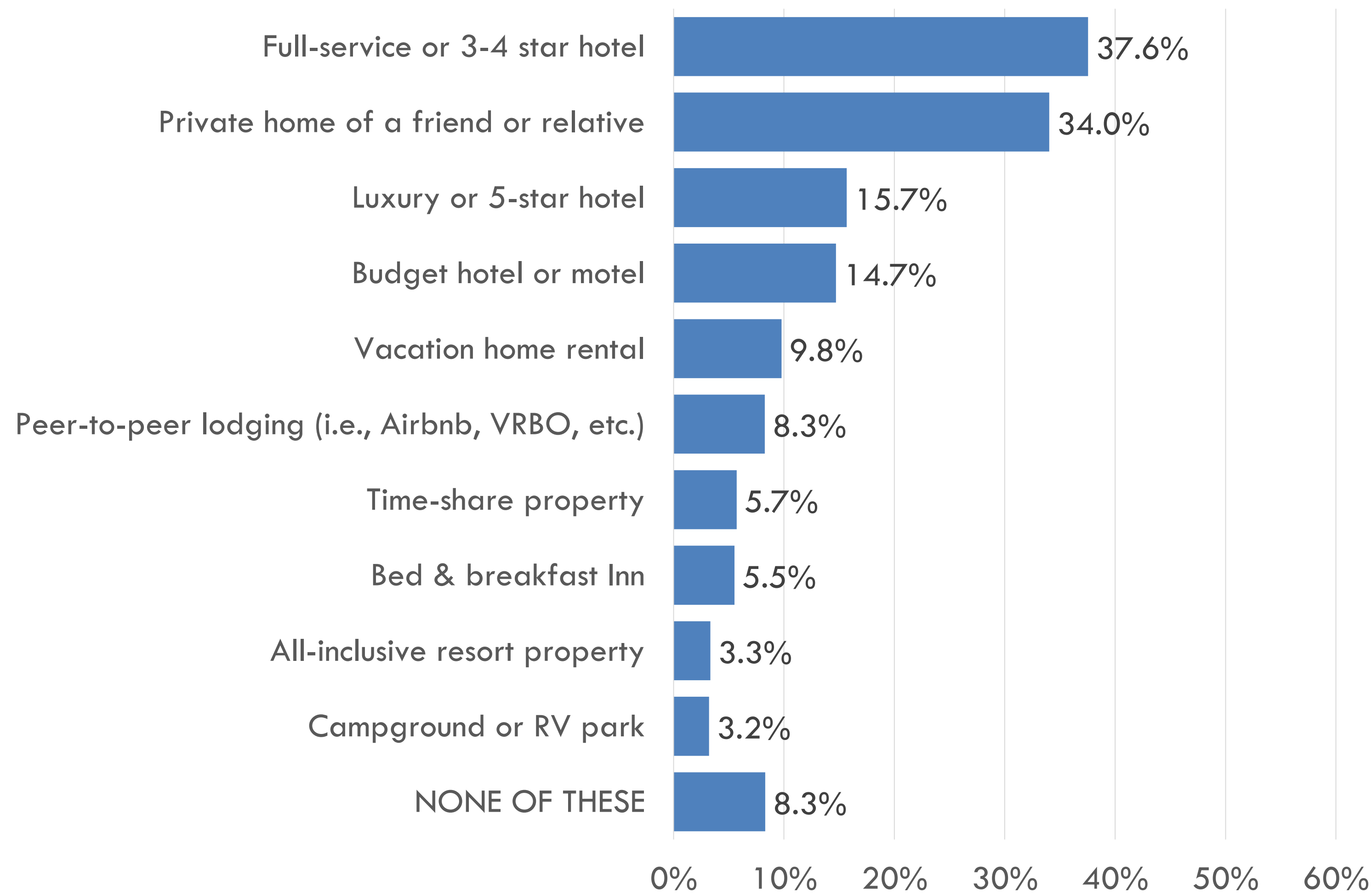
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



EXPECTED PLACE OF STAY (NEXT 3 MONTHS)

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

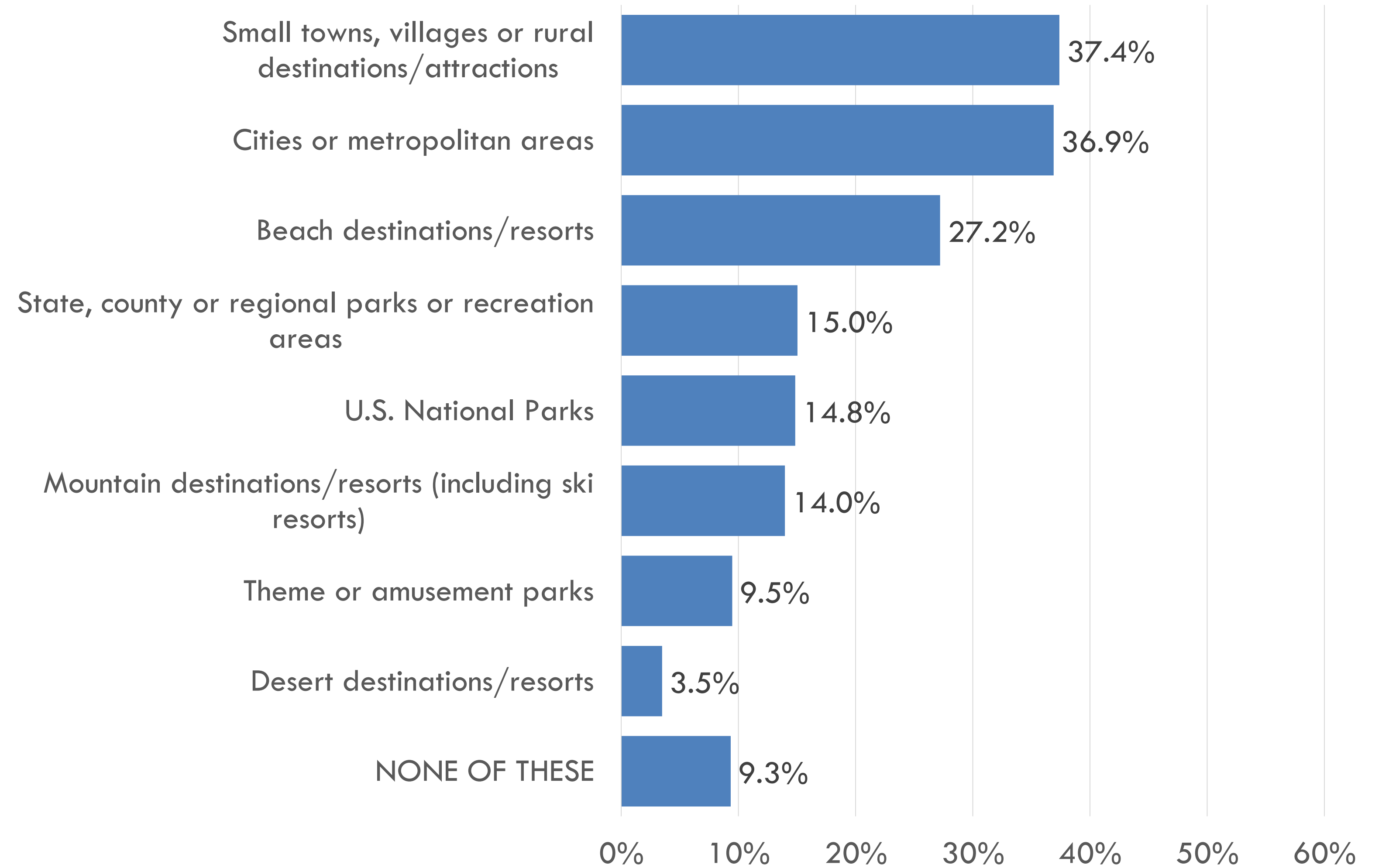
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



DESTINATION TYPES EXPECTED (NEXT 3 MONTHS)

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

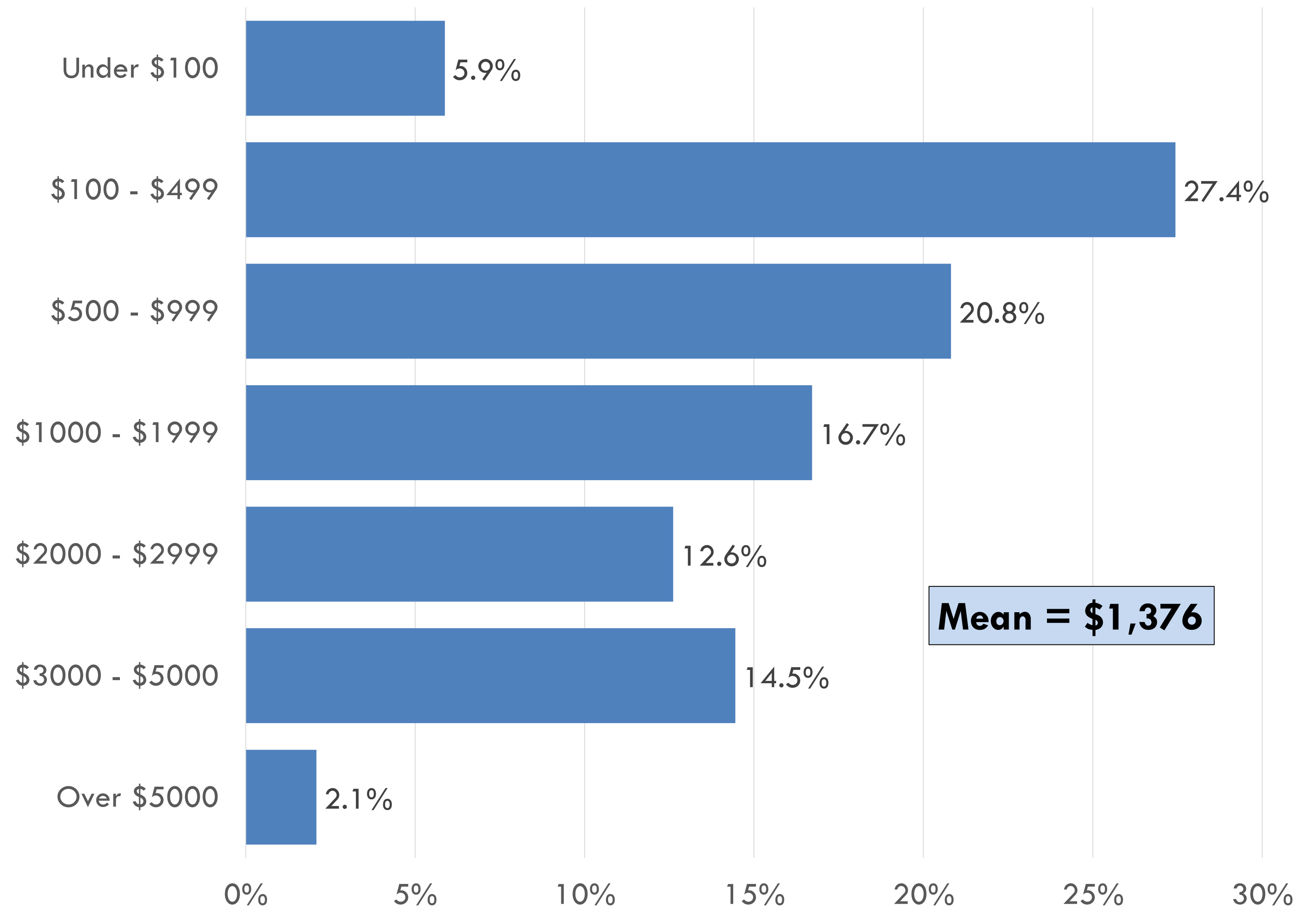
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



EXPECTED LEISURE TRAVEL SPENDING (NEXT 3 MONTHS)

Question: How much IN TOTAL do you expect to spend on the leisure trips you will take in the next three-month period (January to March)?

(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 425 completed surveys. Data collected January 1-3, 2021)

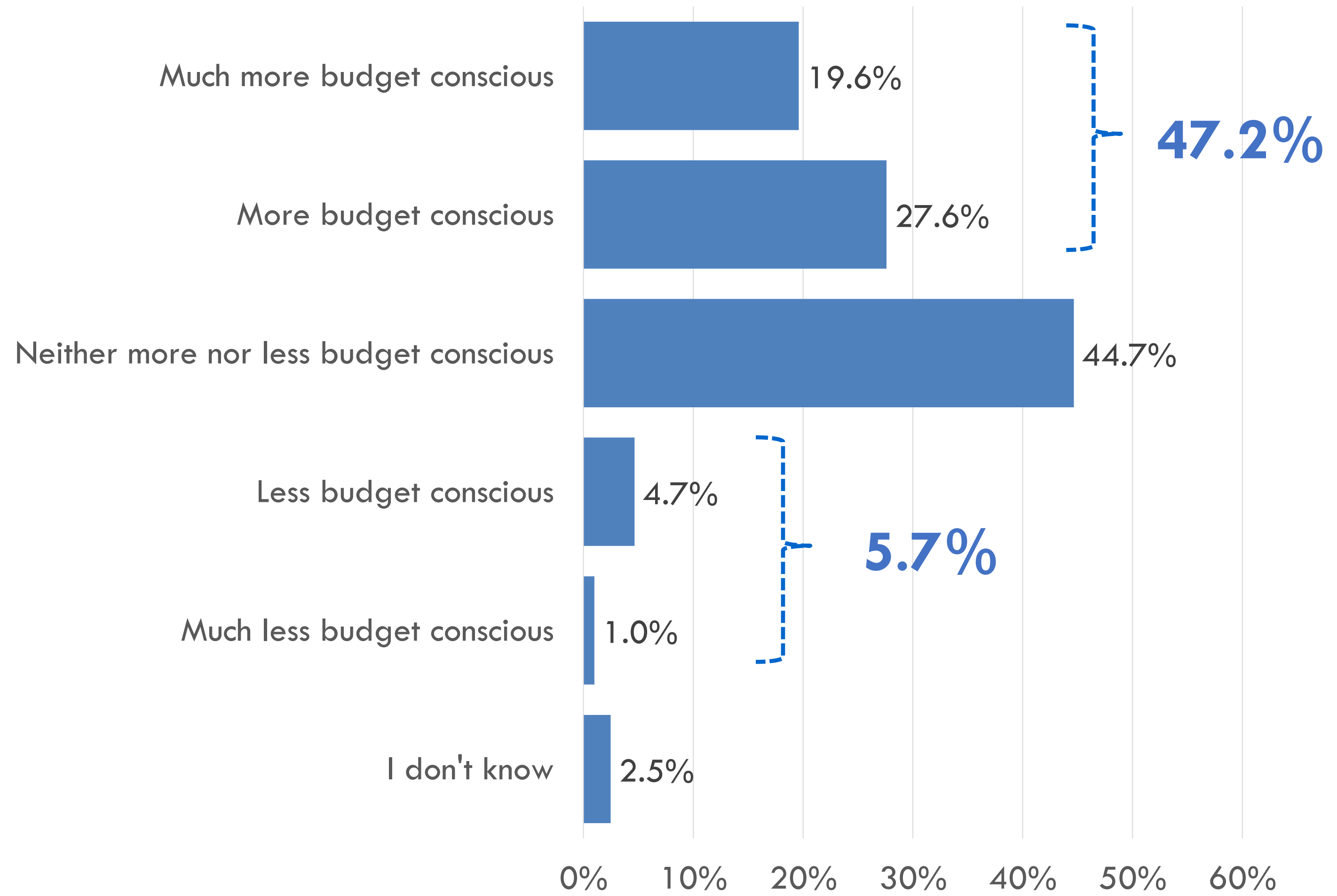


BUDGET CONSCIOUSNESS AROUND TRAVEL (NEXT 3 MONTHS)

Question: Compared to most recent three months, how budget conscious will you be while traveling in the NEXT THREE MONTHS?

I will be _____ while traveling.

(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)

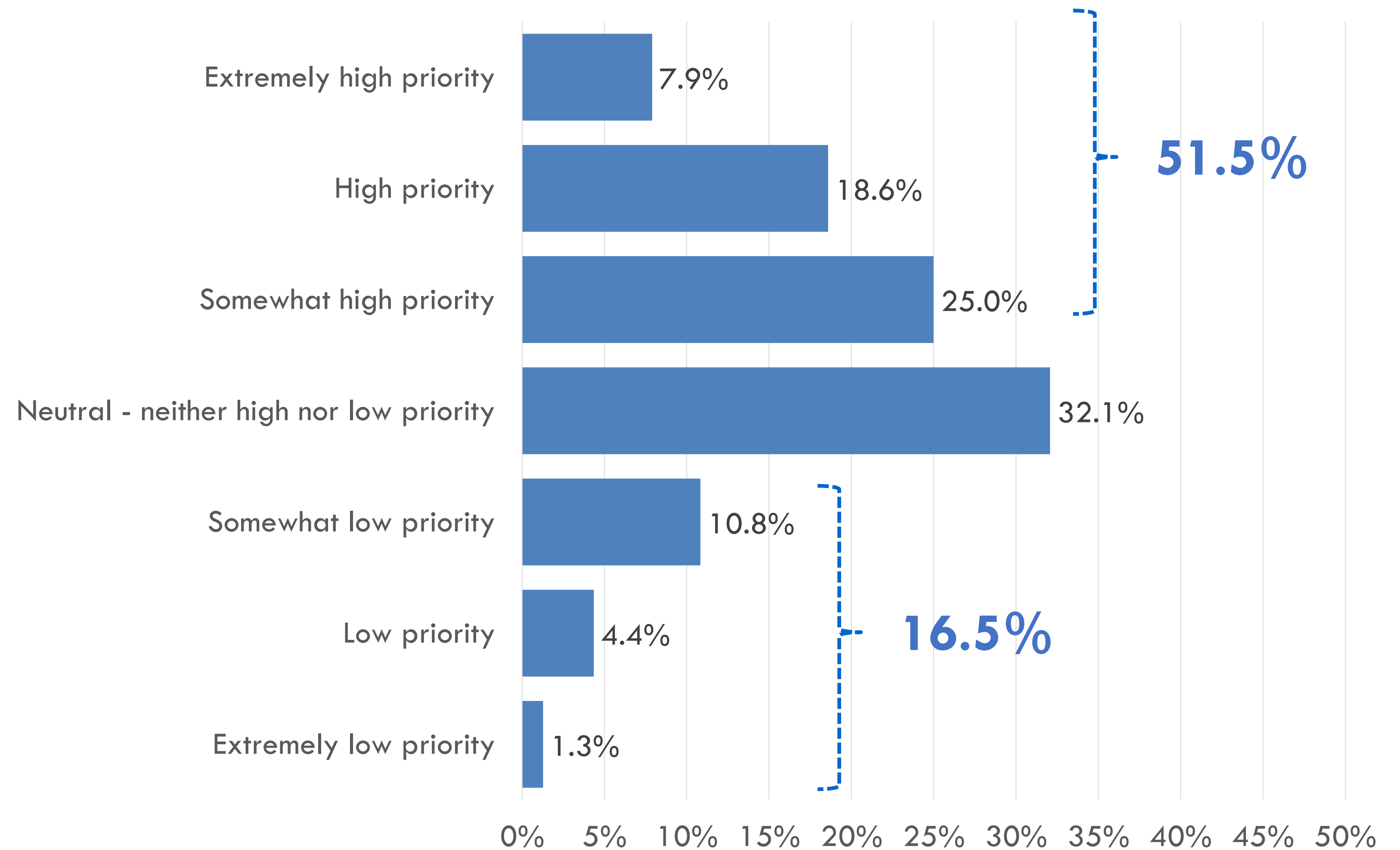


LEISURE TRAVEL AS A BUDGET PRIORITY (NEXT 3 MONTHS)

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a _____.

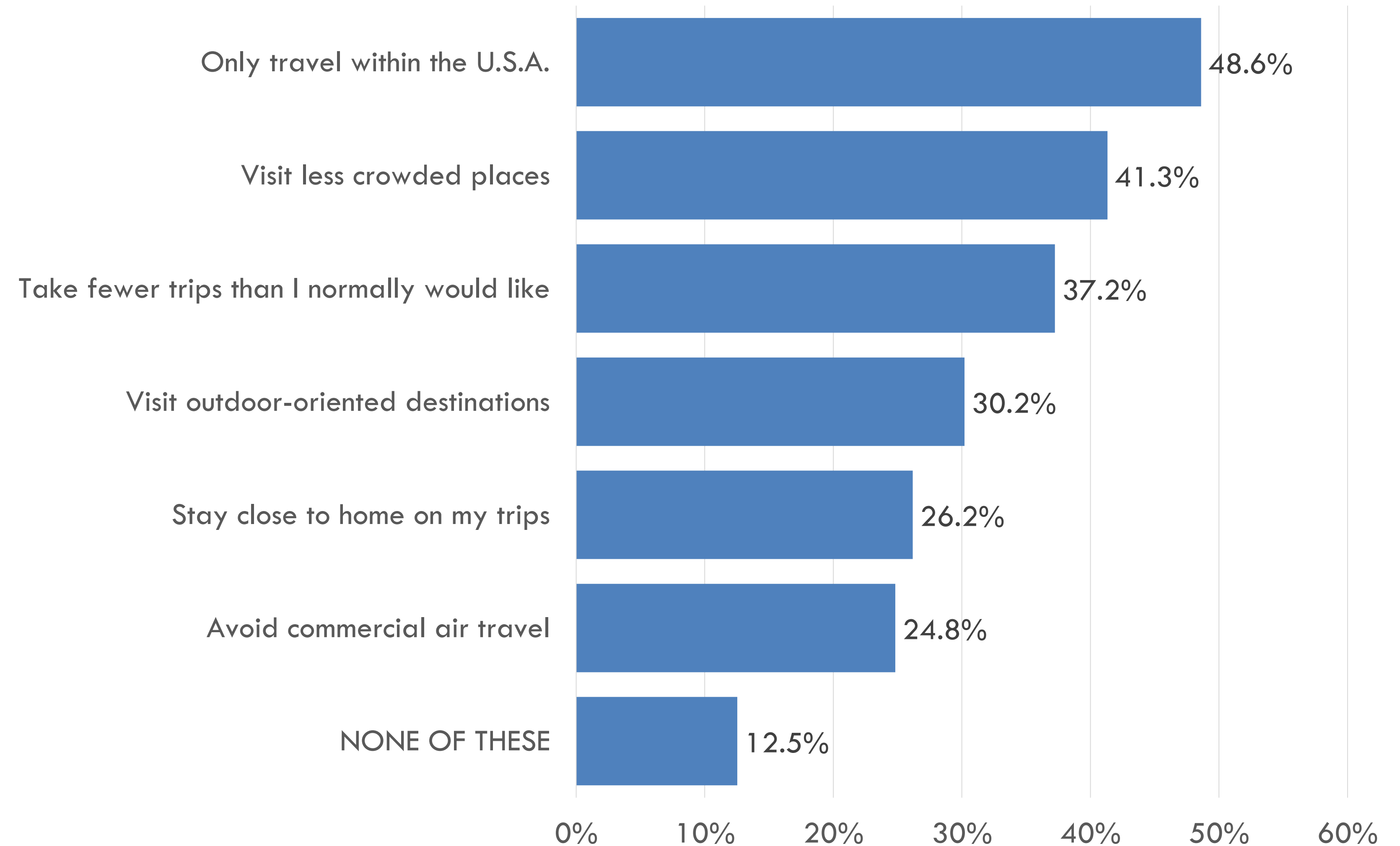
(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



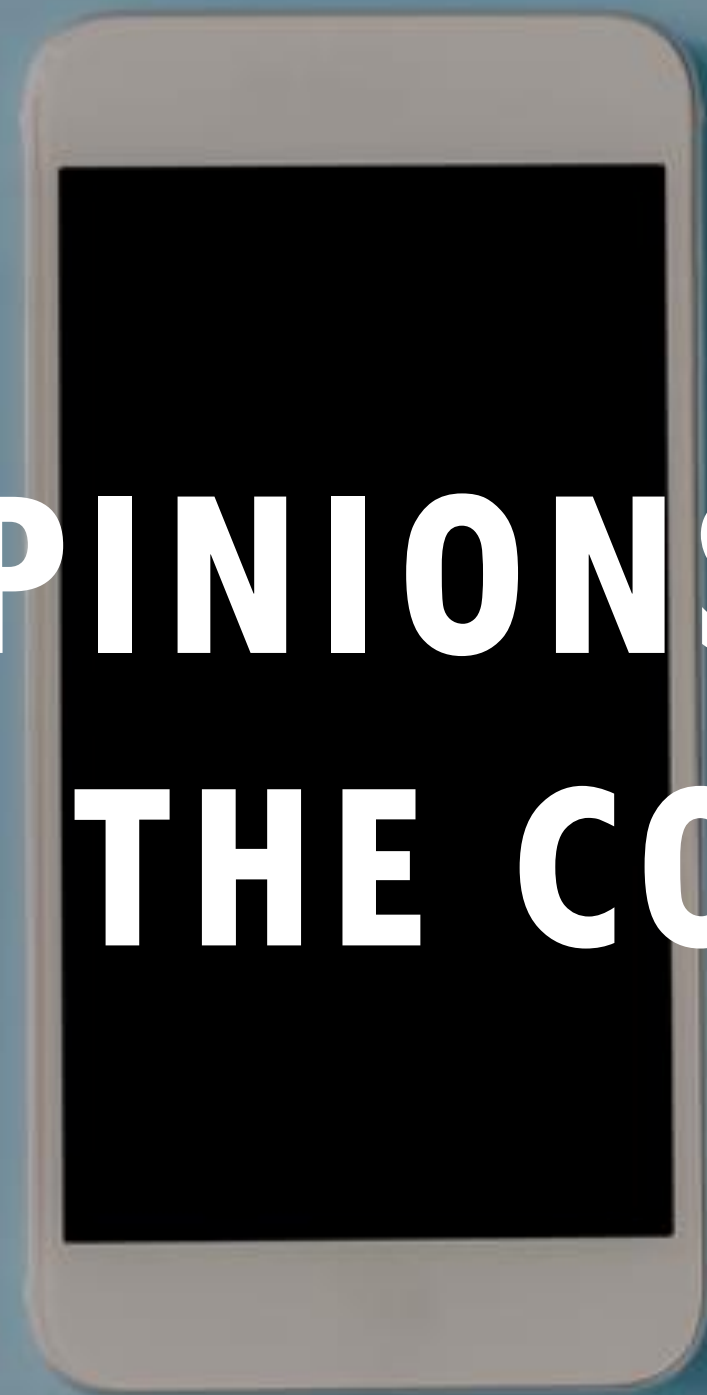
EXPECTATIONS FOR ADAPTING TO THE PANDEMIC (NEXT 3 MONTHS)

Question: In the **NEXT THREE MONTHS**, which of these actions do you expect to take as a result of the ongoing **COVID-19** pandemic? (Select all that apply)

(Base: Waves 43 data. Respondents who expect to take a leisure trip in the first three months of this year, 436 completed surveys. Data collected January 1-3, 2021)



**OPINIONS ON TRAVEL &
THE CORONAVIRUS**

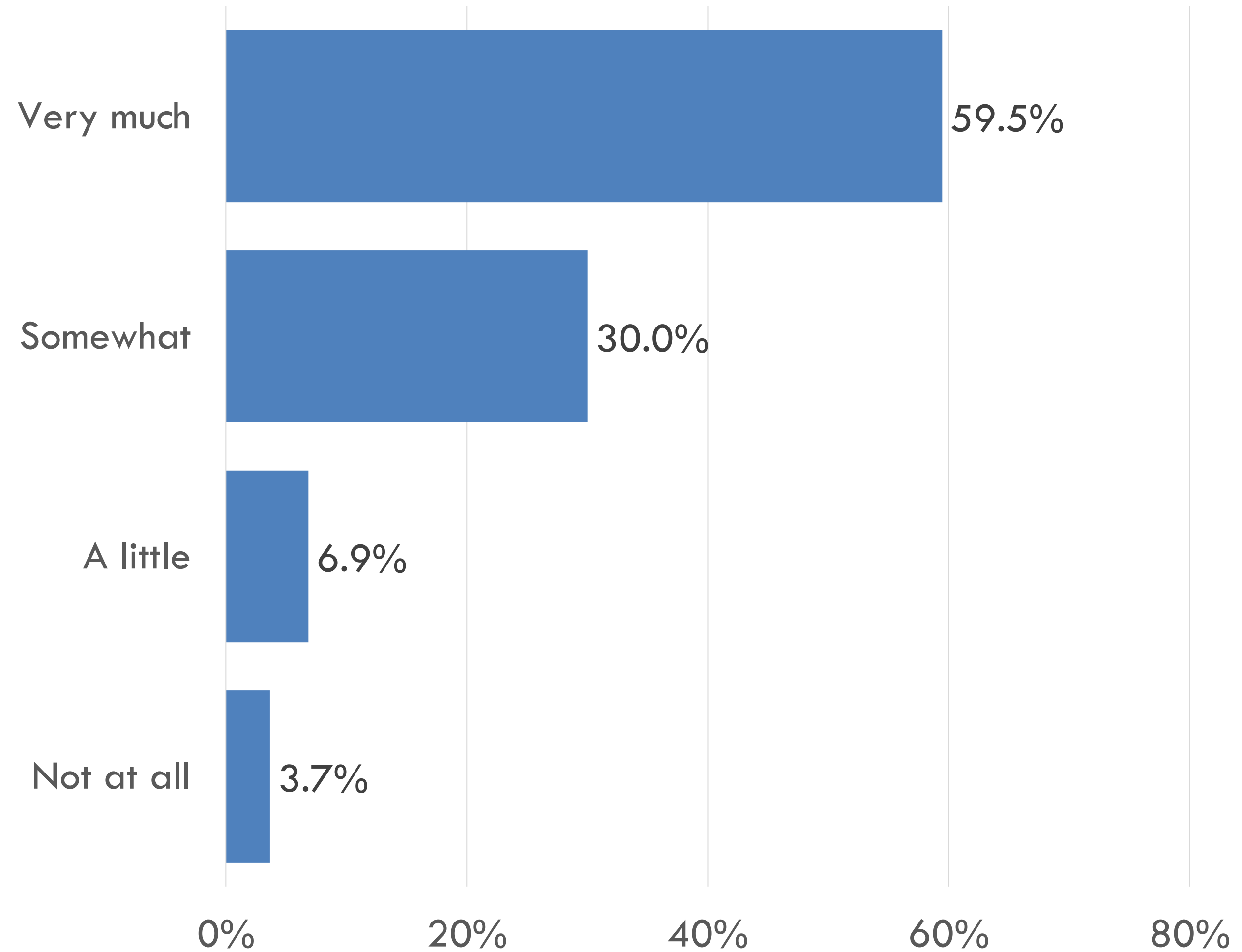


HOW MUCH DO YOU MISS TRAVELING

Question: How much do you miss traveling? (Select one to fill in the blank)

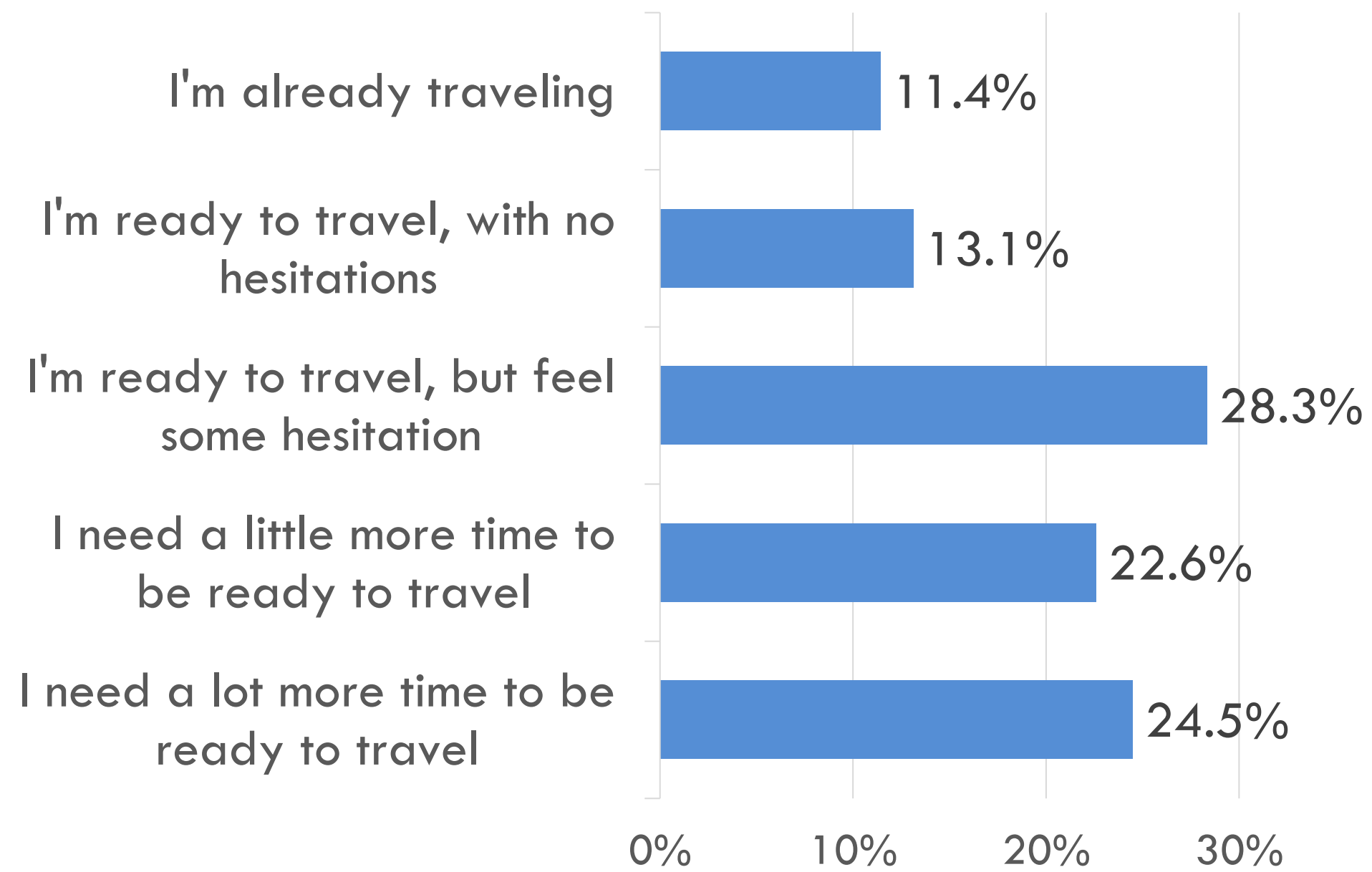
I miss traveling _____.

(Base: Waves 43 data. Respondents who have changed their travel patterns in response to the pandemic, 921 completed surveys. Data collected January 1-3, 2021)

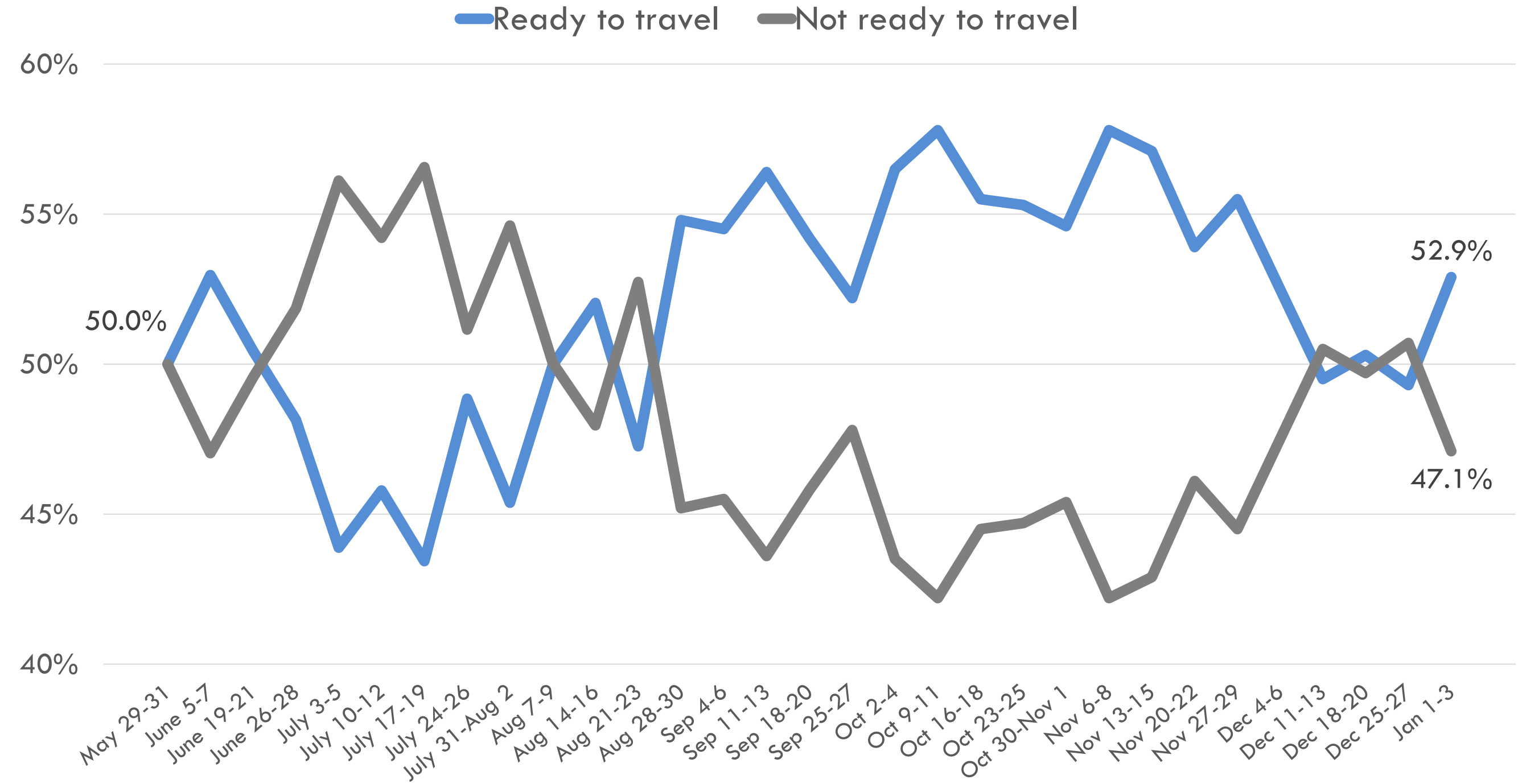


TRAVEL STATE-OF-MIND

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



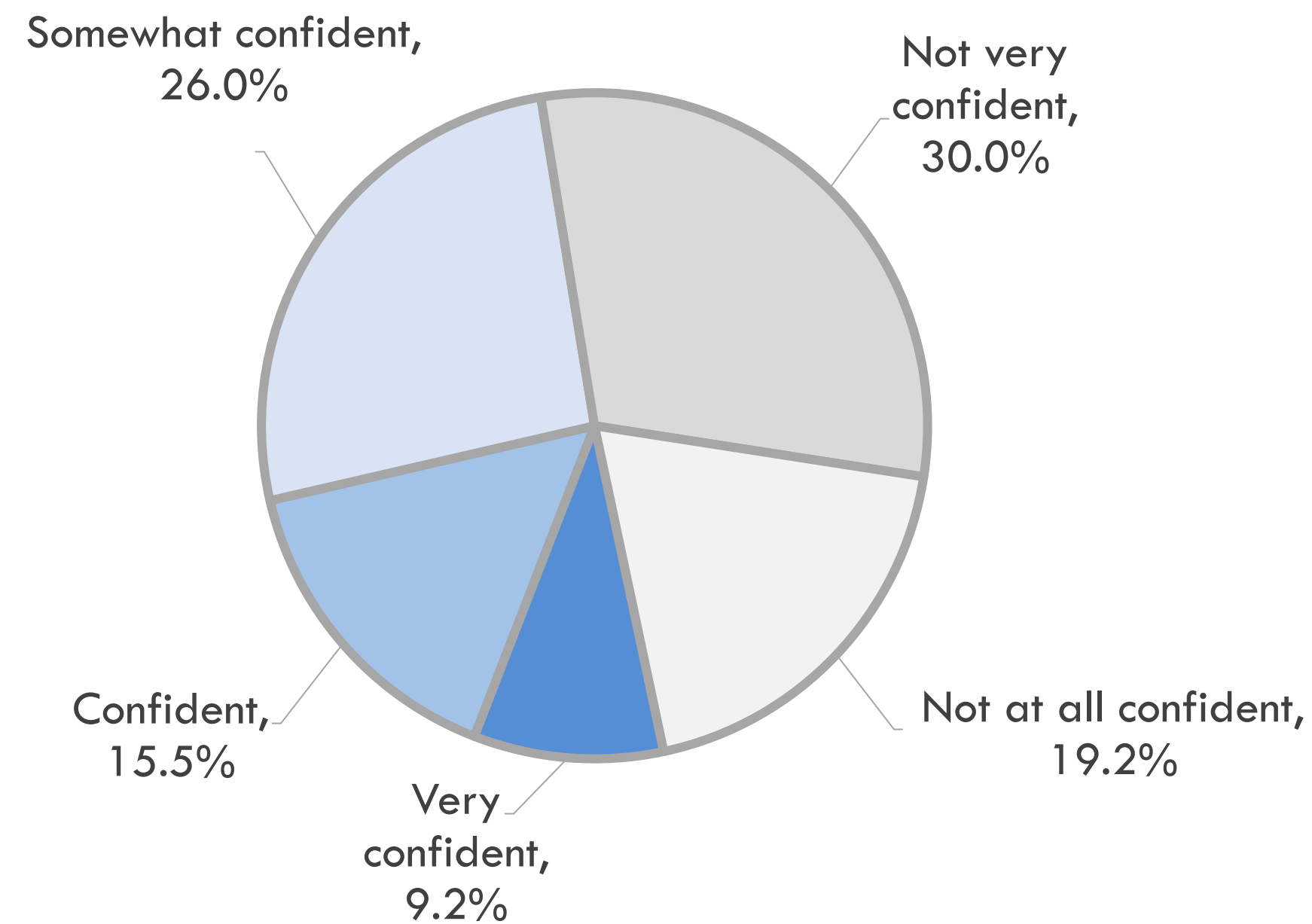
Historical data



(Base: Waves 12-13 and 15-43. 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, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

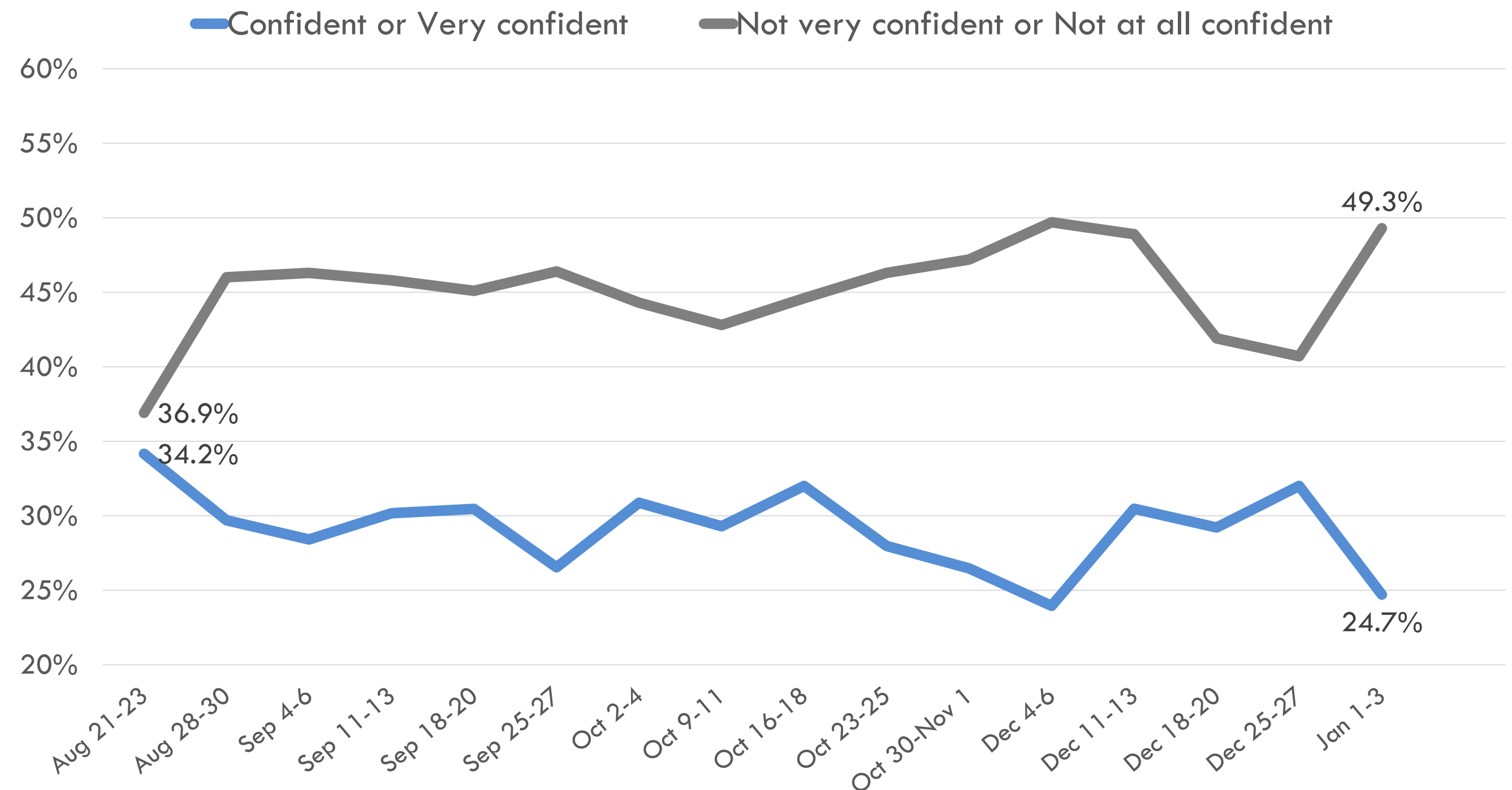
CONFIDENCE IN ABILITY TO TRAVEL SAFELY

Question: How confident are you that you can travel safely in the current environment?



(Base: Wave 24-34 and 39-43 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

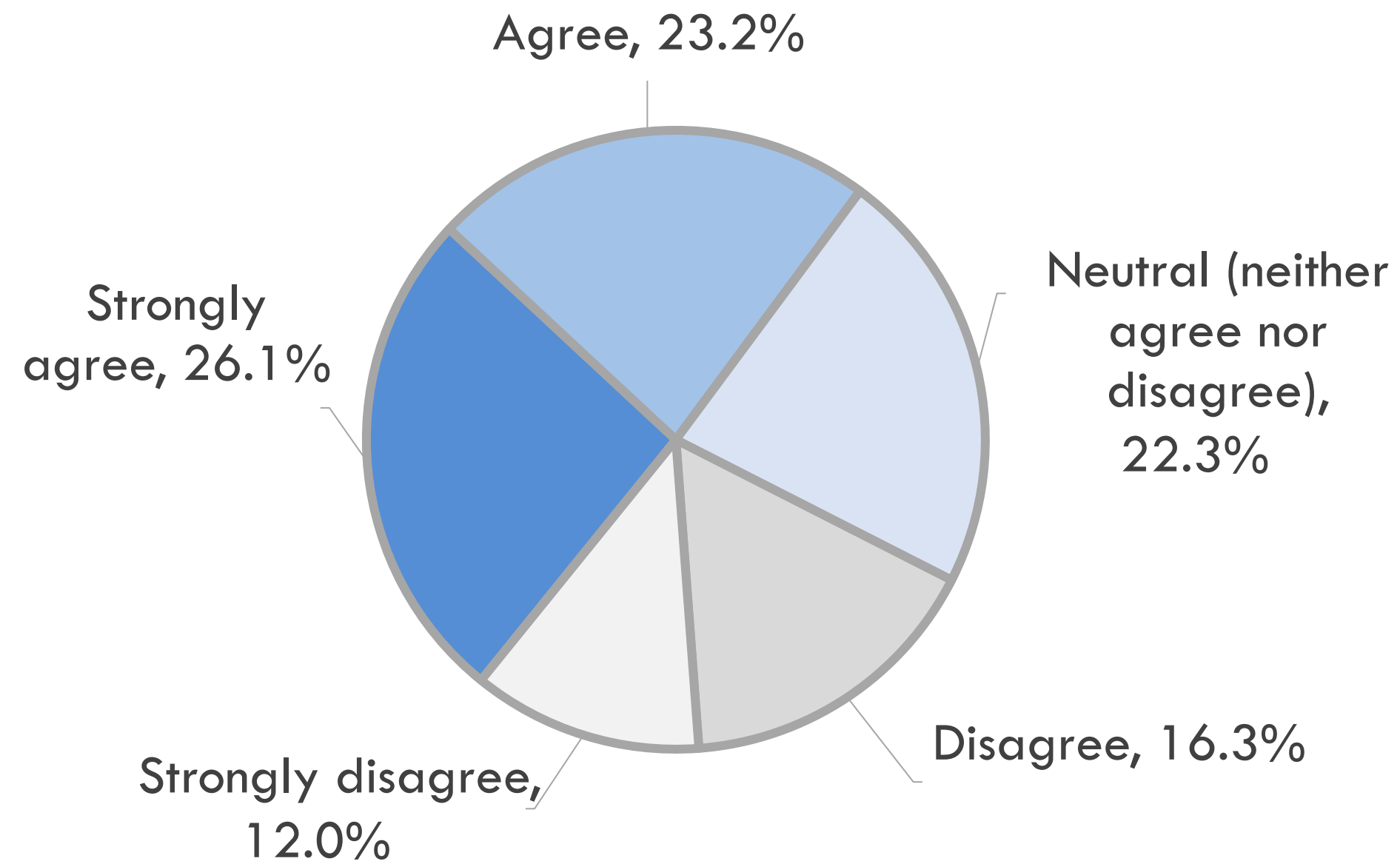
Historical data



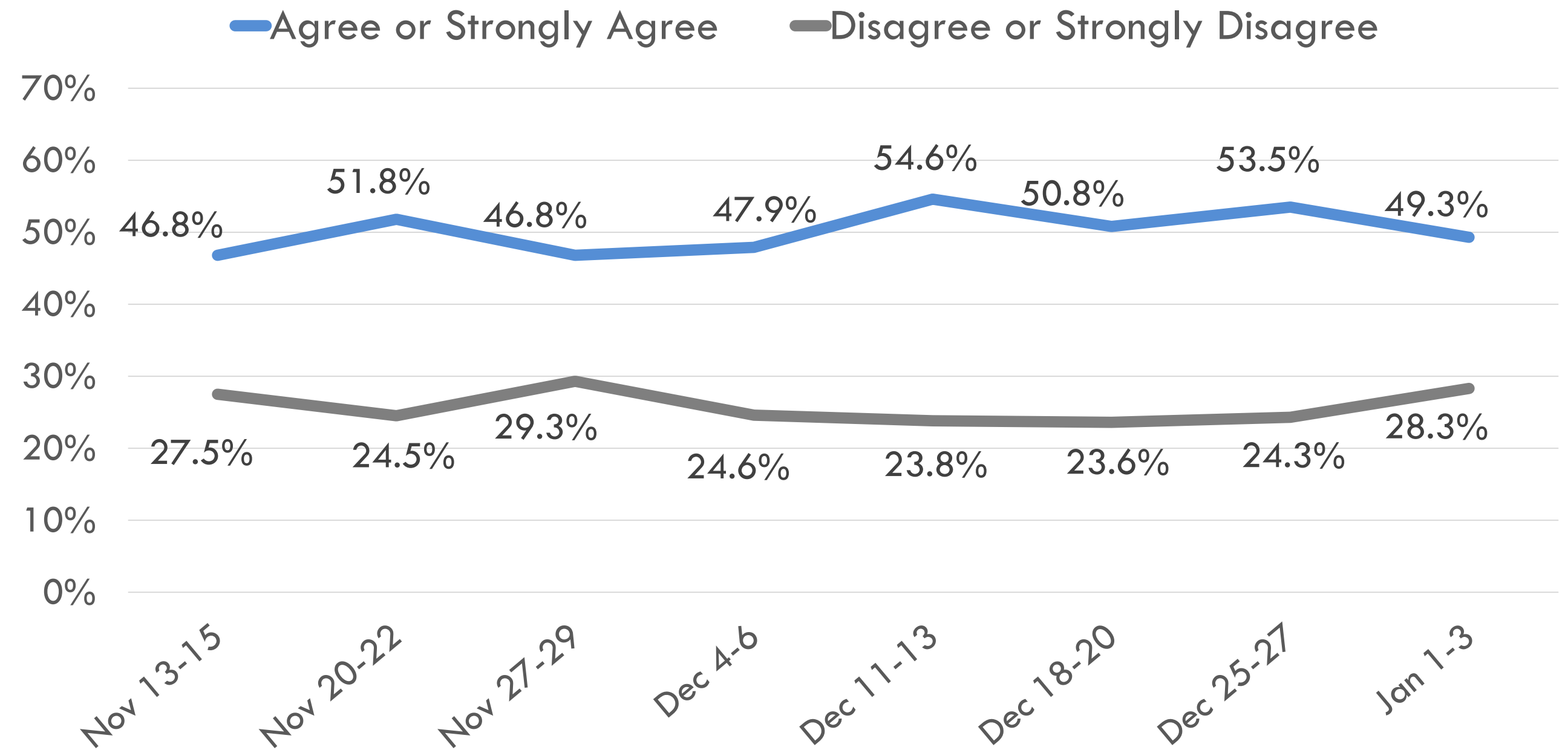
TRAVEL GUILT

How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



Historical data

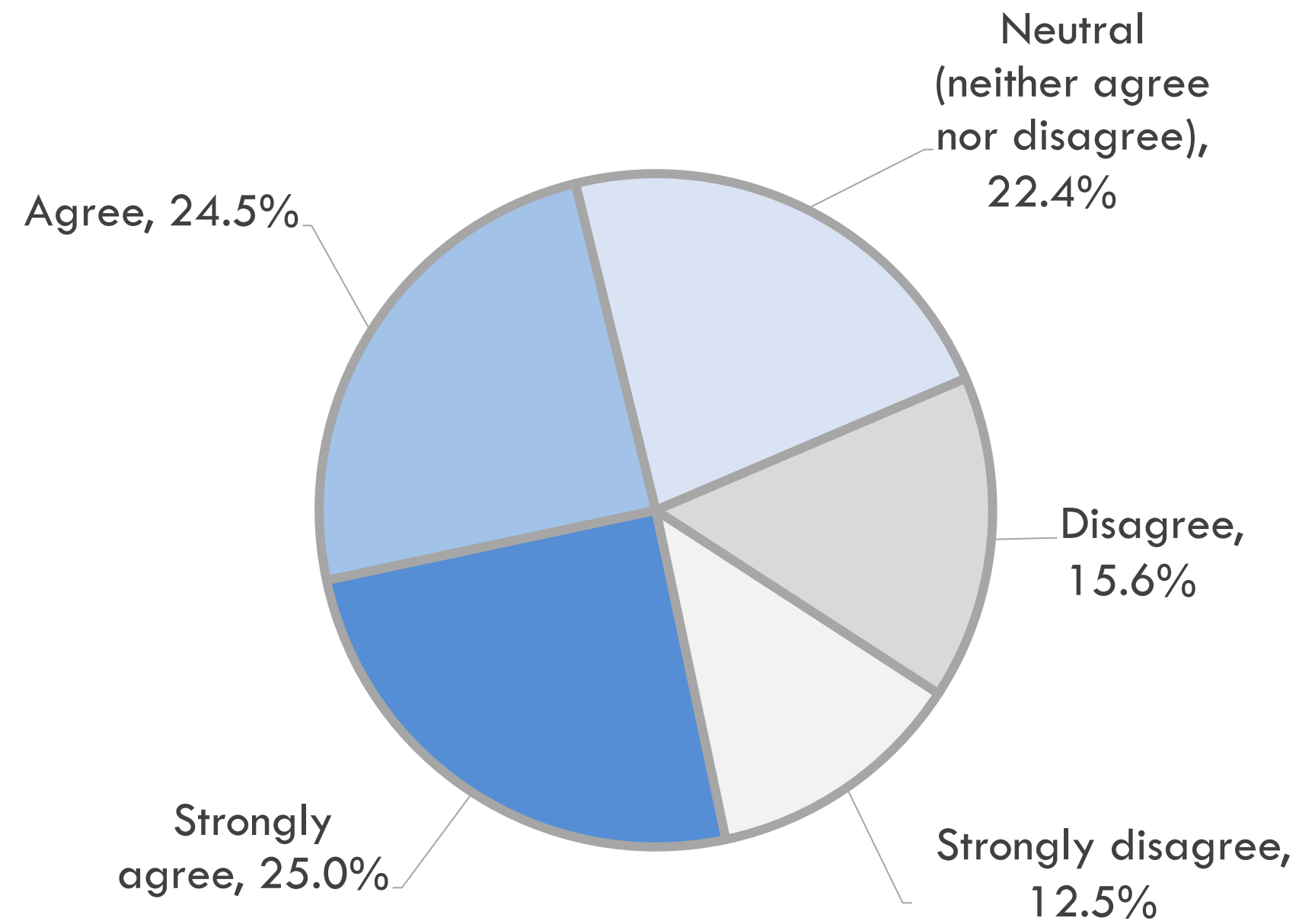


(Base: Waves 36-43 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

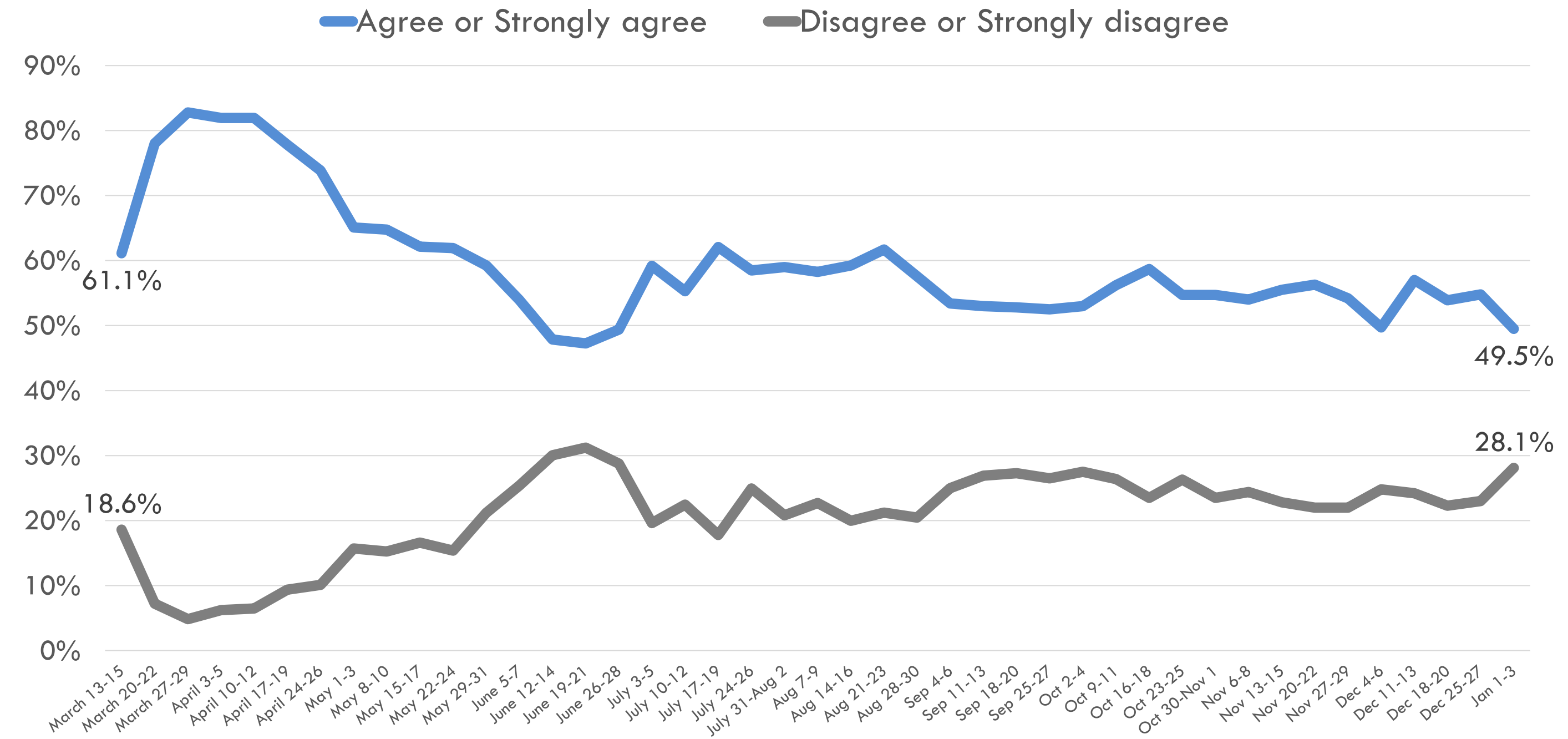
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.



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

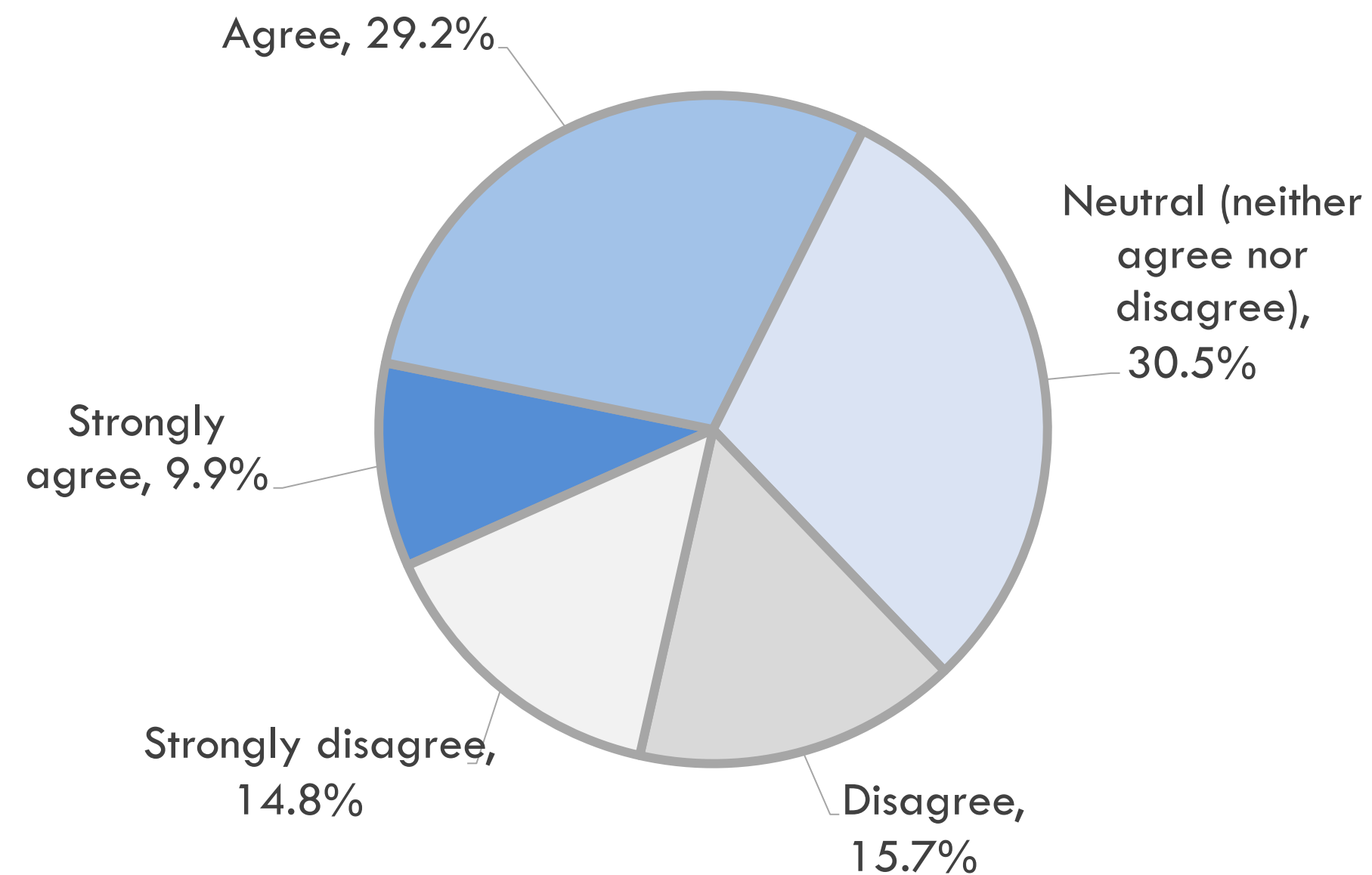
Historical data



DISCOUNTS AND PRICE CUTS

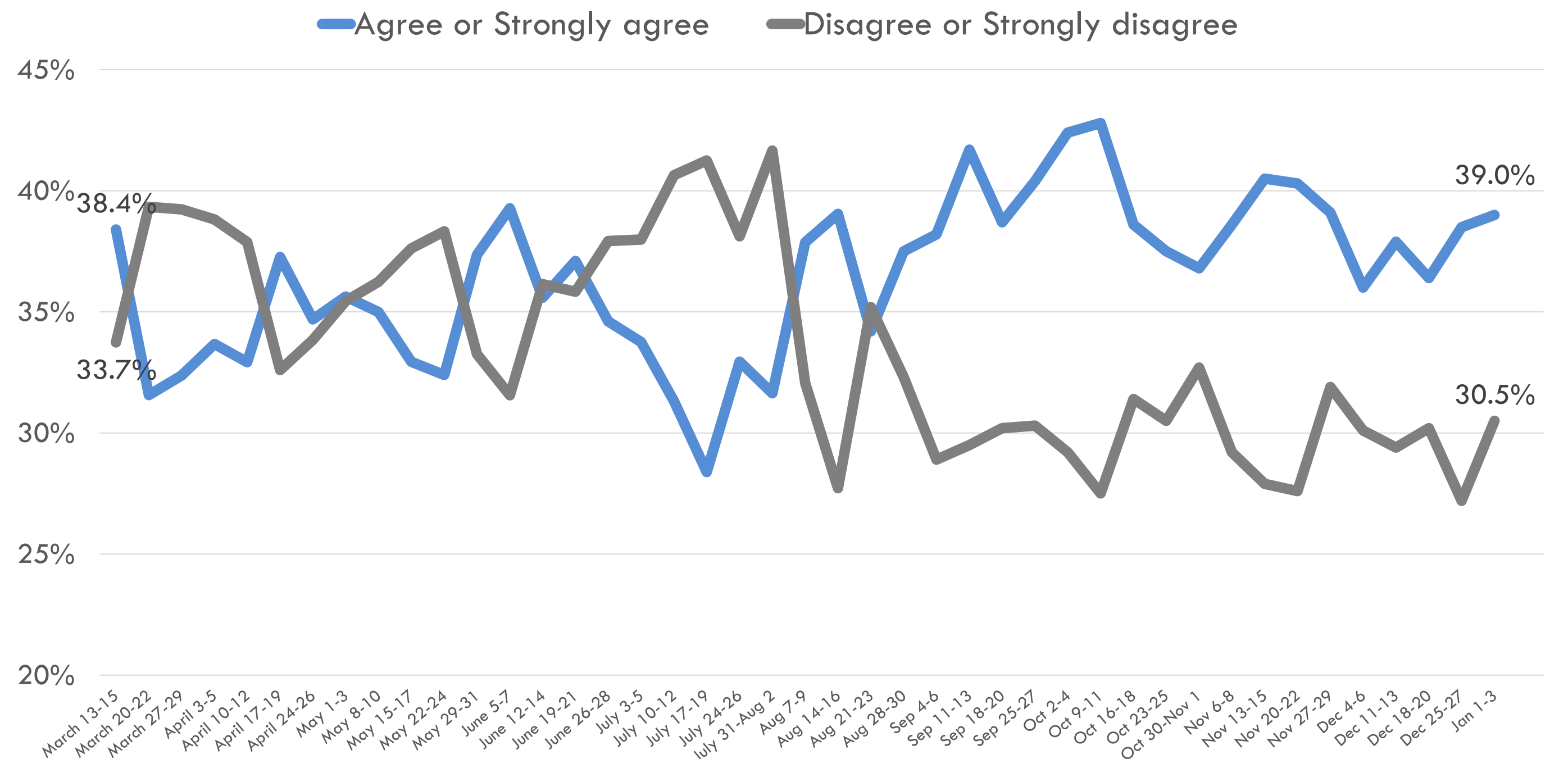
How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.



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

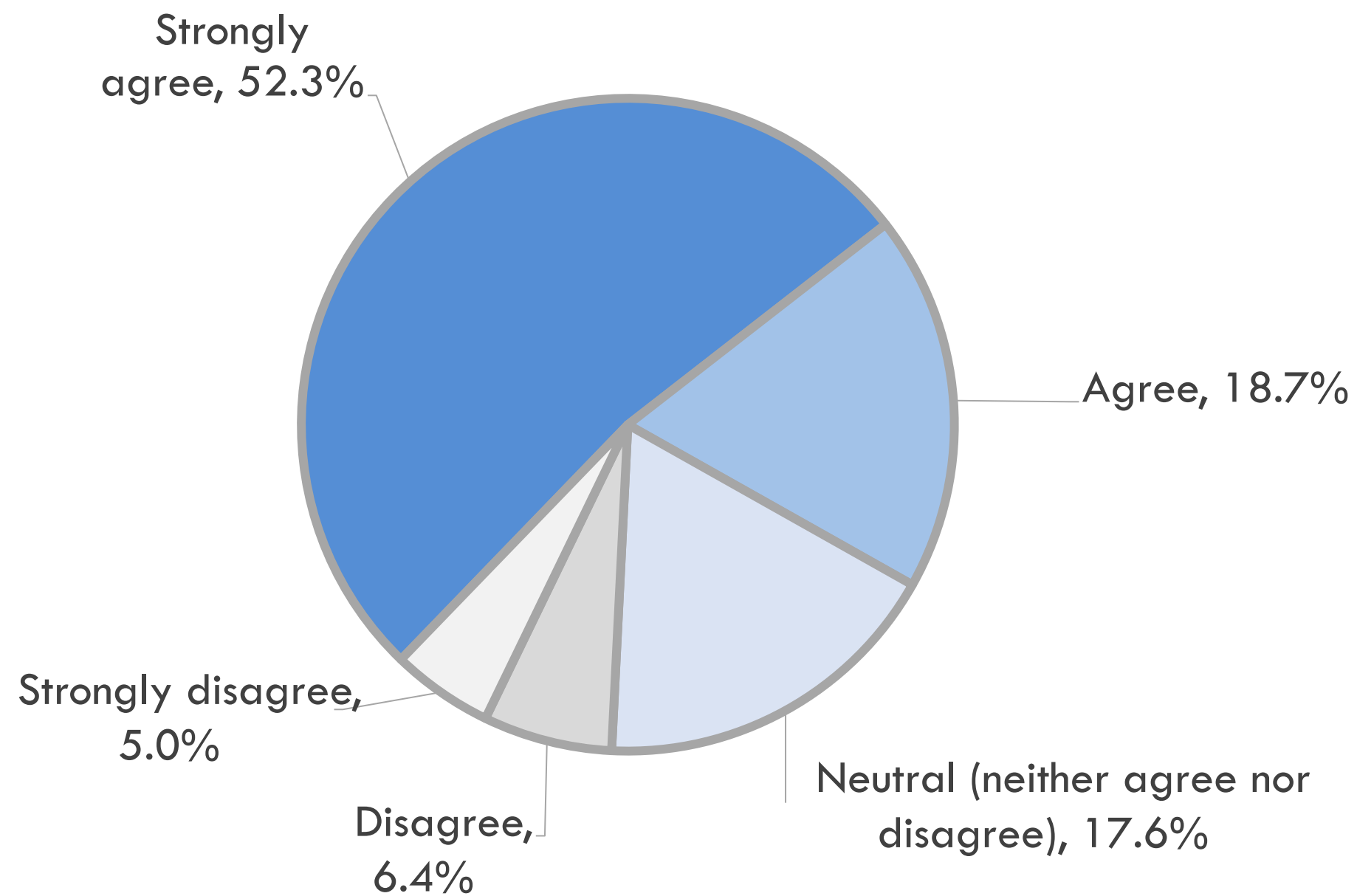
Historical data



AVOIDING INTERNATIONAL TRAVEL

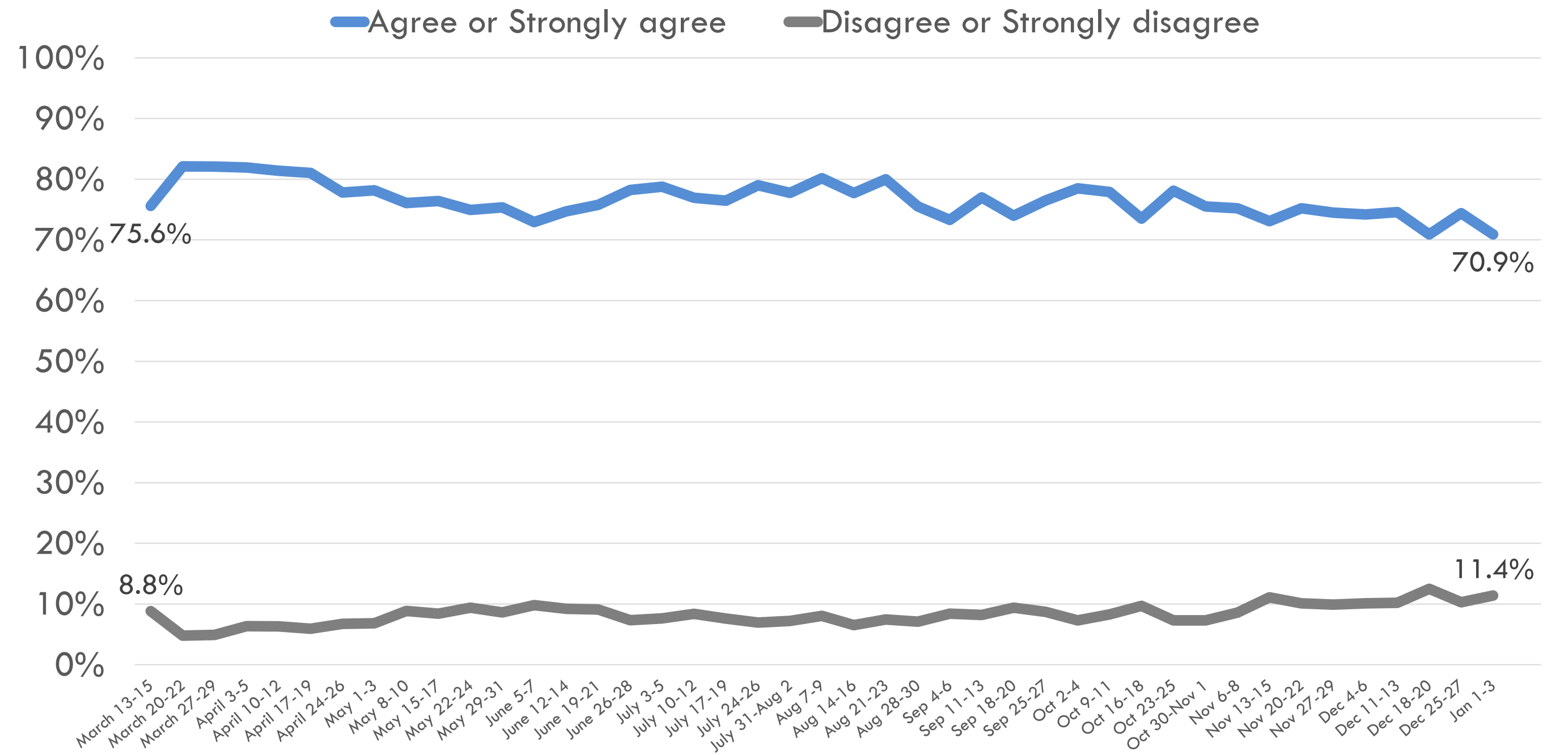
How much do you agree with the following statement?

Statement: I will be unlikely to travel outside the United States until the coronavirus situation is resolved.



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

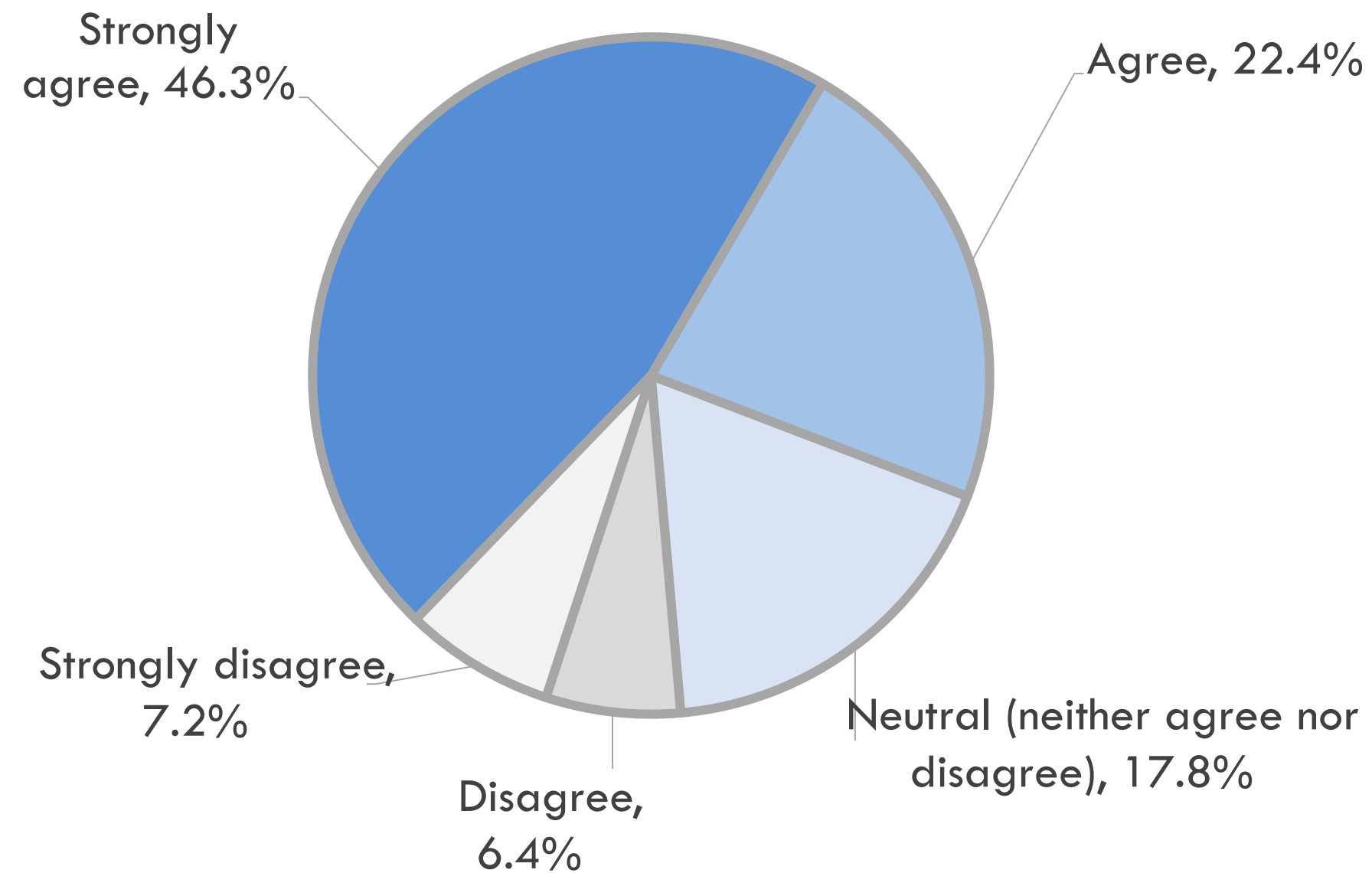
Historical data



AVOIDING CONVENTIONS & CONFERENCES

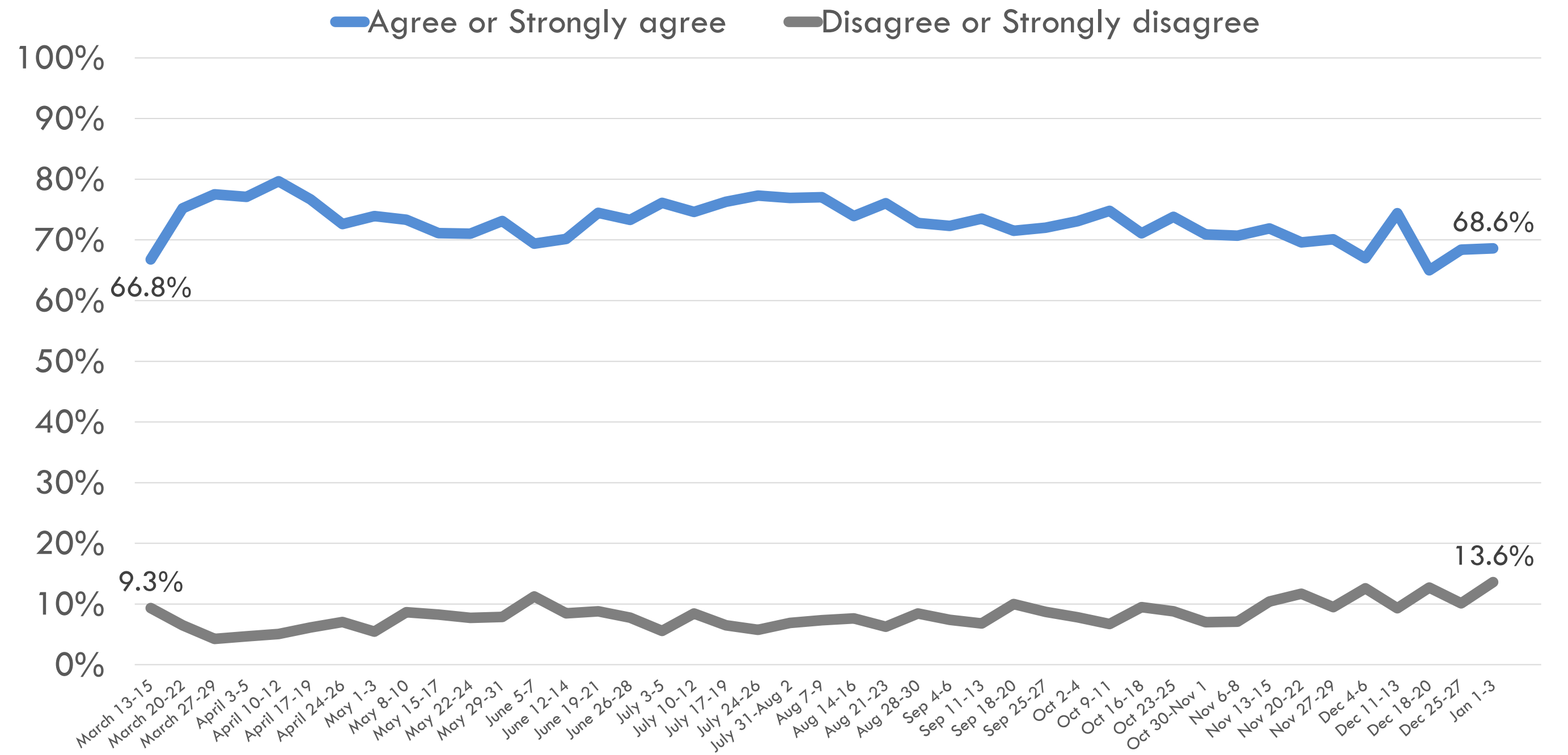
How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



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

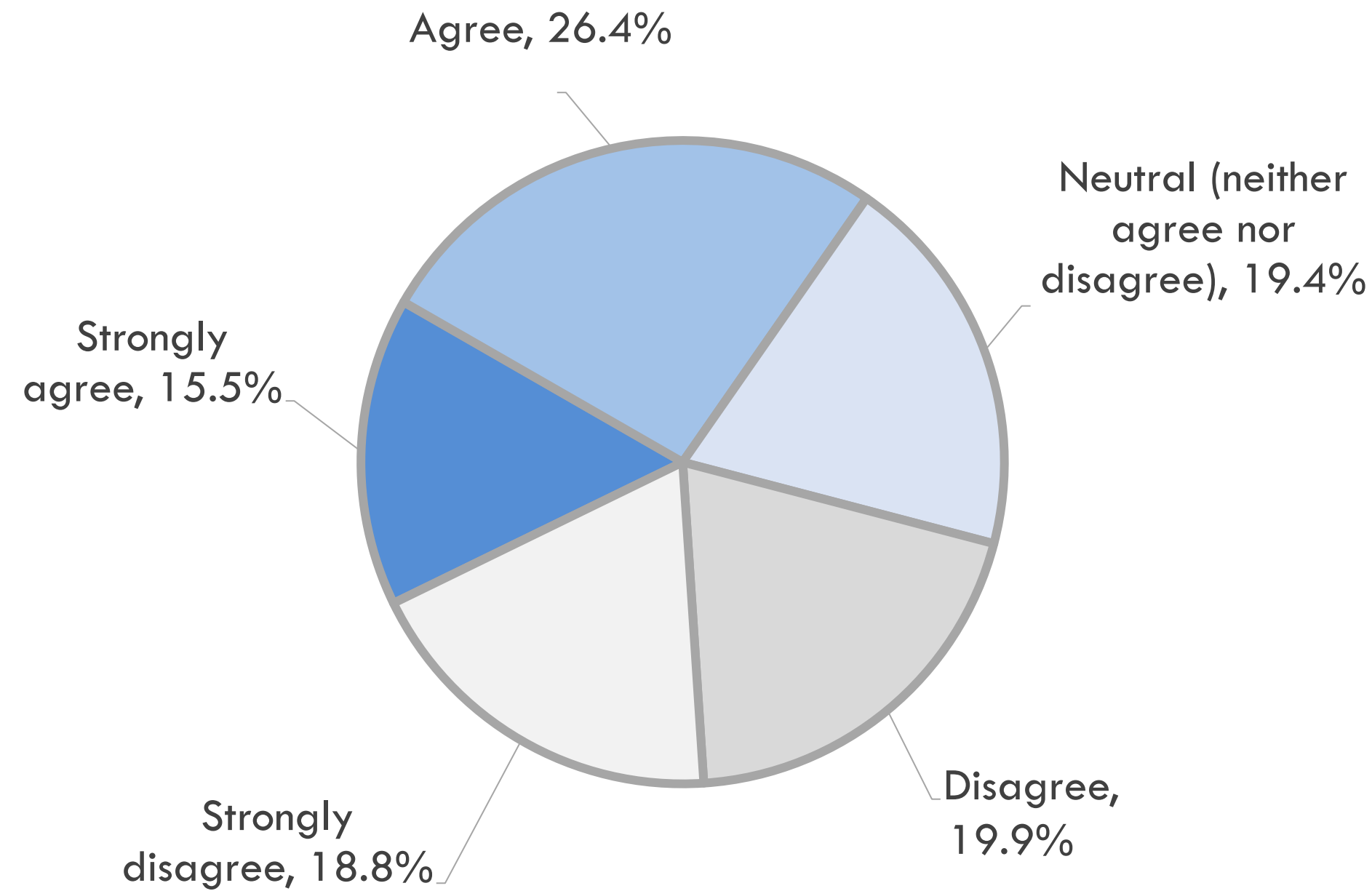
Historical data



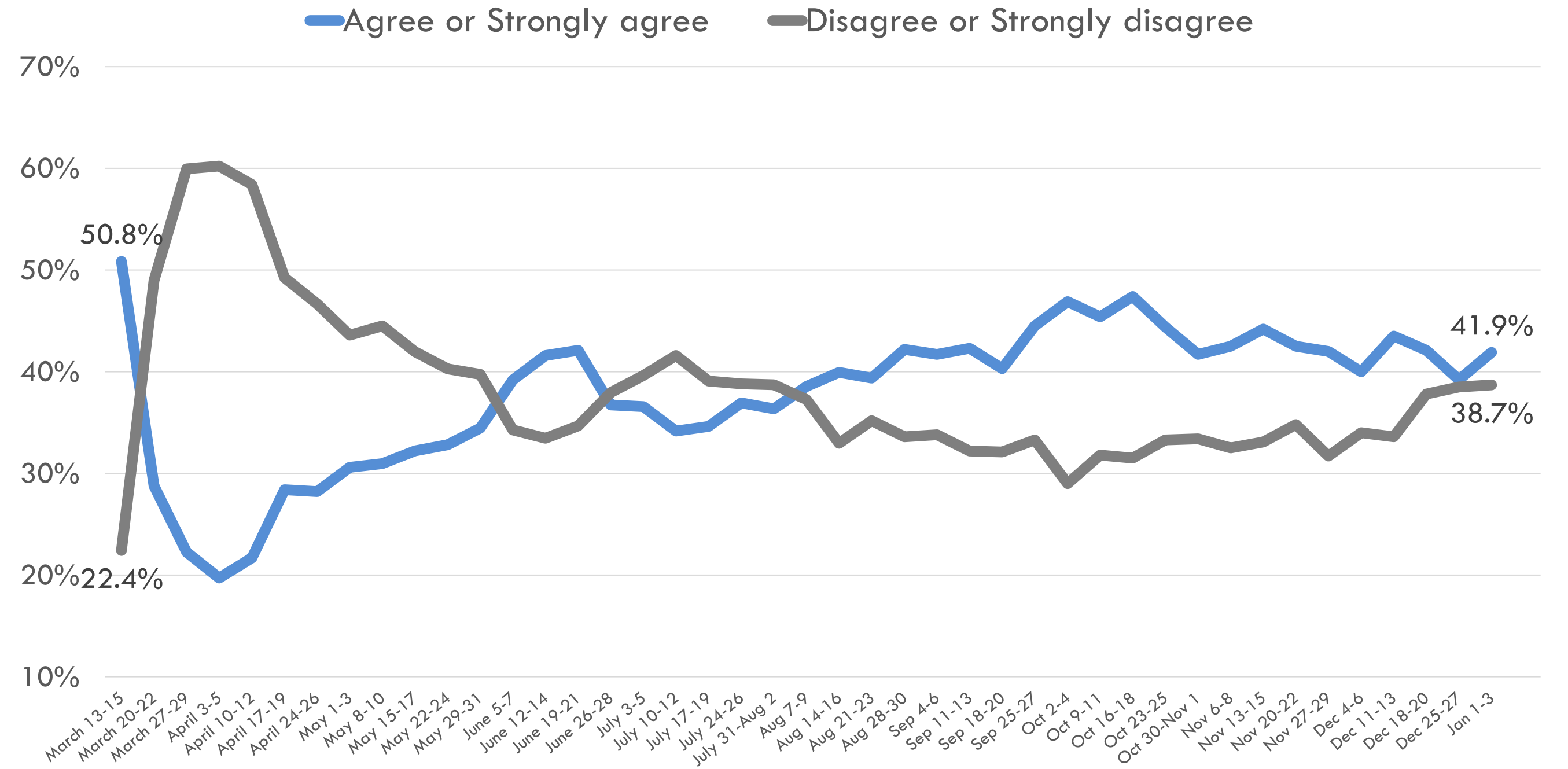
COMFORT ENJOYING HOME COMMUNITY

How much do you agree with the following statement?

Statement: I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.



Historical data

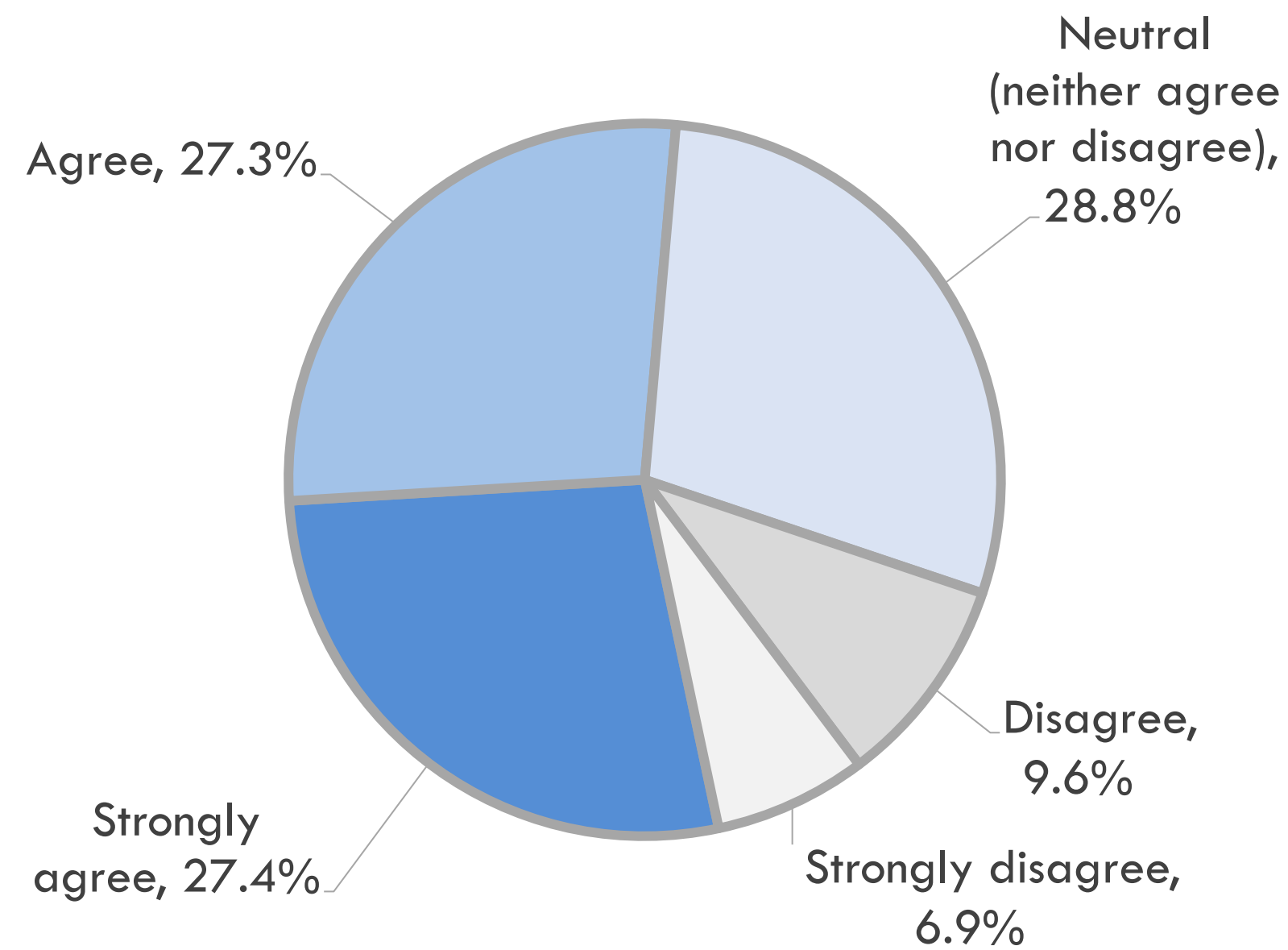


(Base: Waves 1-43. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

TRAVELERS IN COMMUNITY ARE UNWANTED

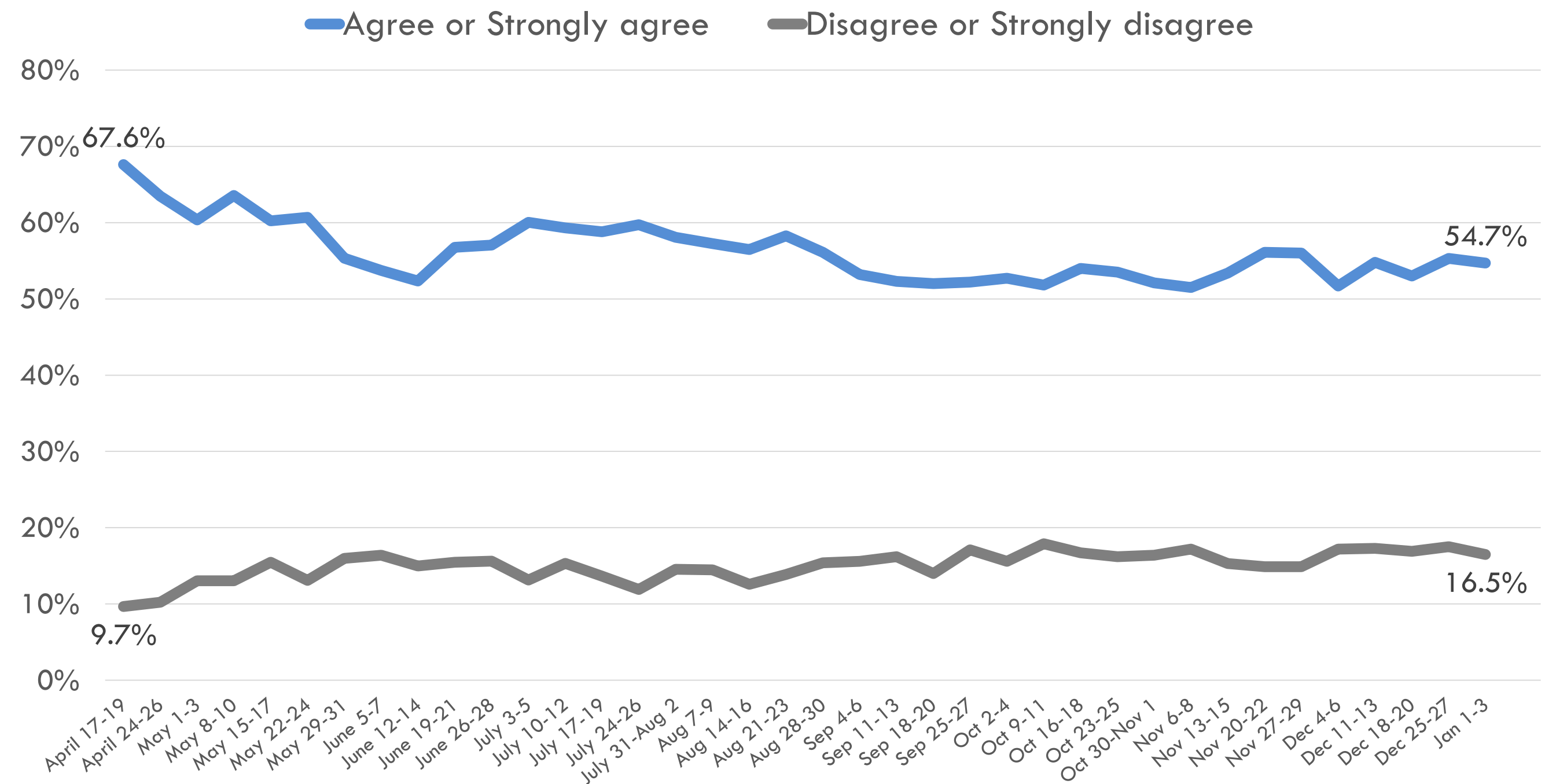
How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



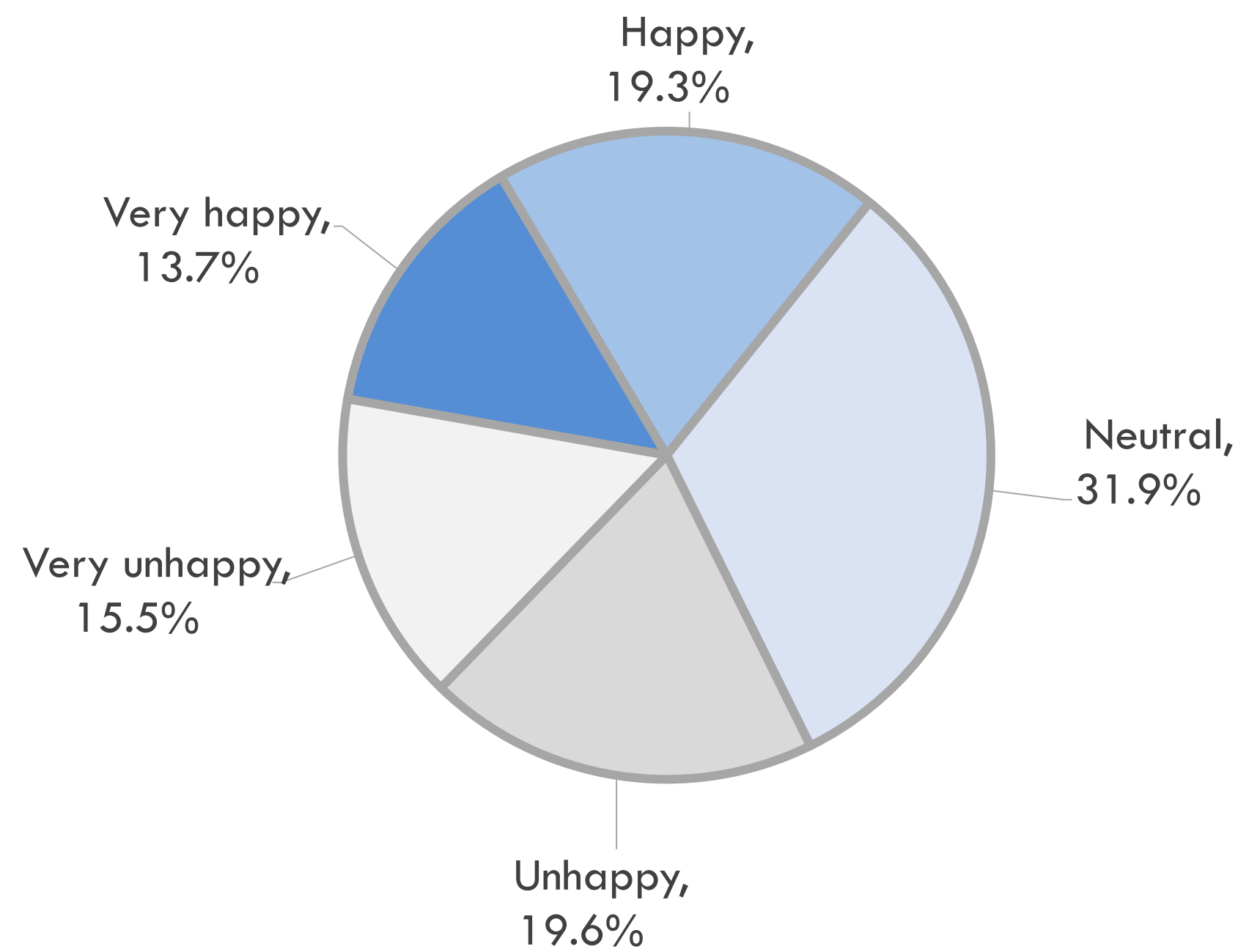
(Base: Waves 6-43. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

Historical data



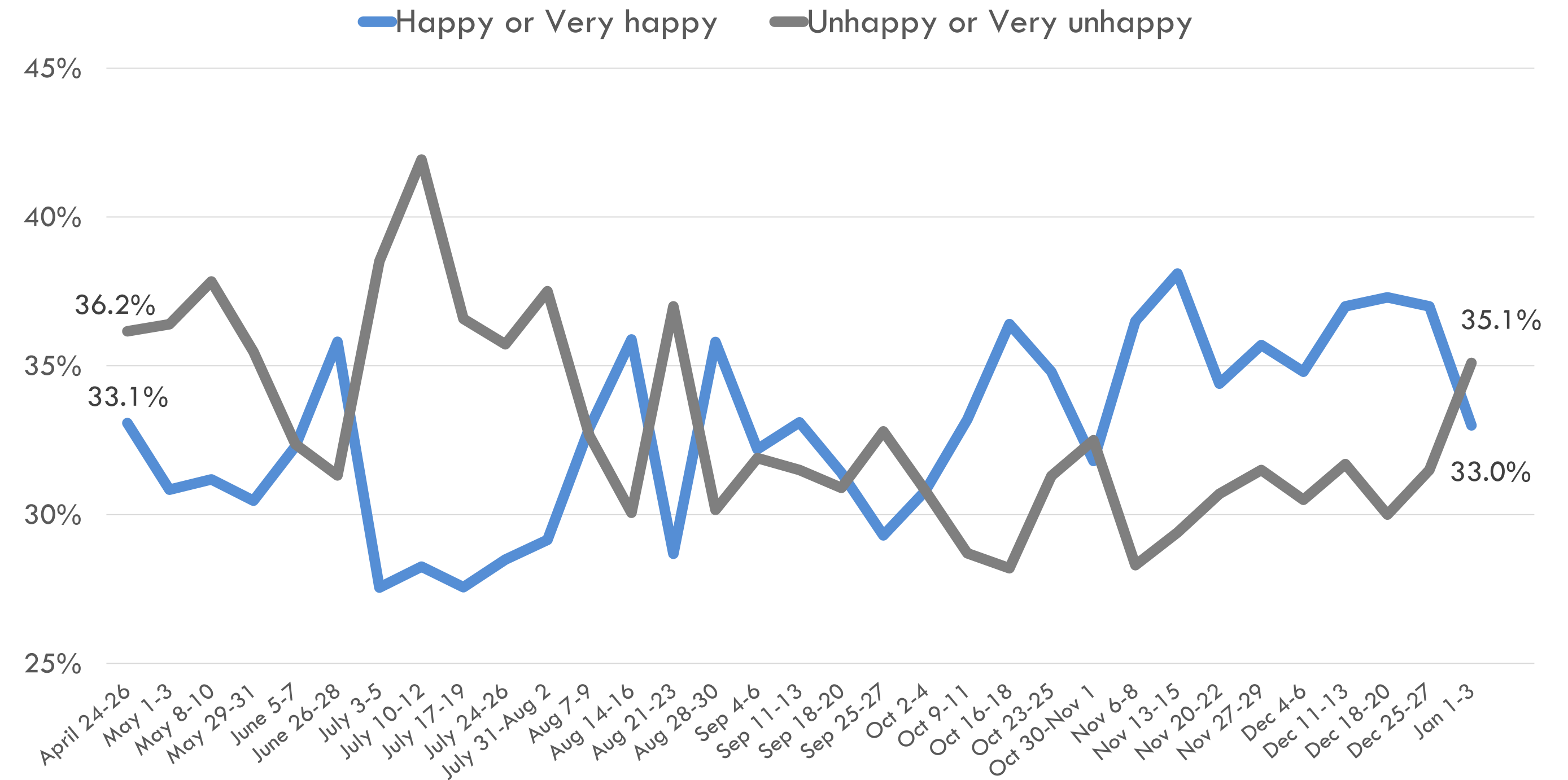
FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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 16-43. 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, 1,205, 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 and 1,206 completed surveys.)

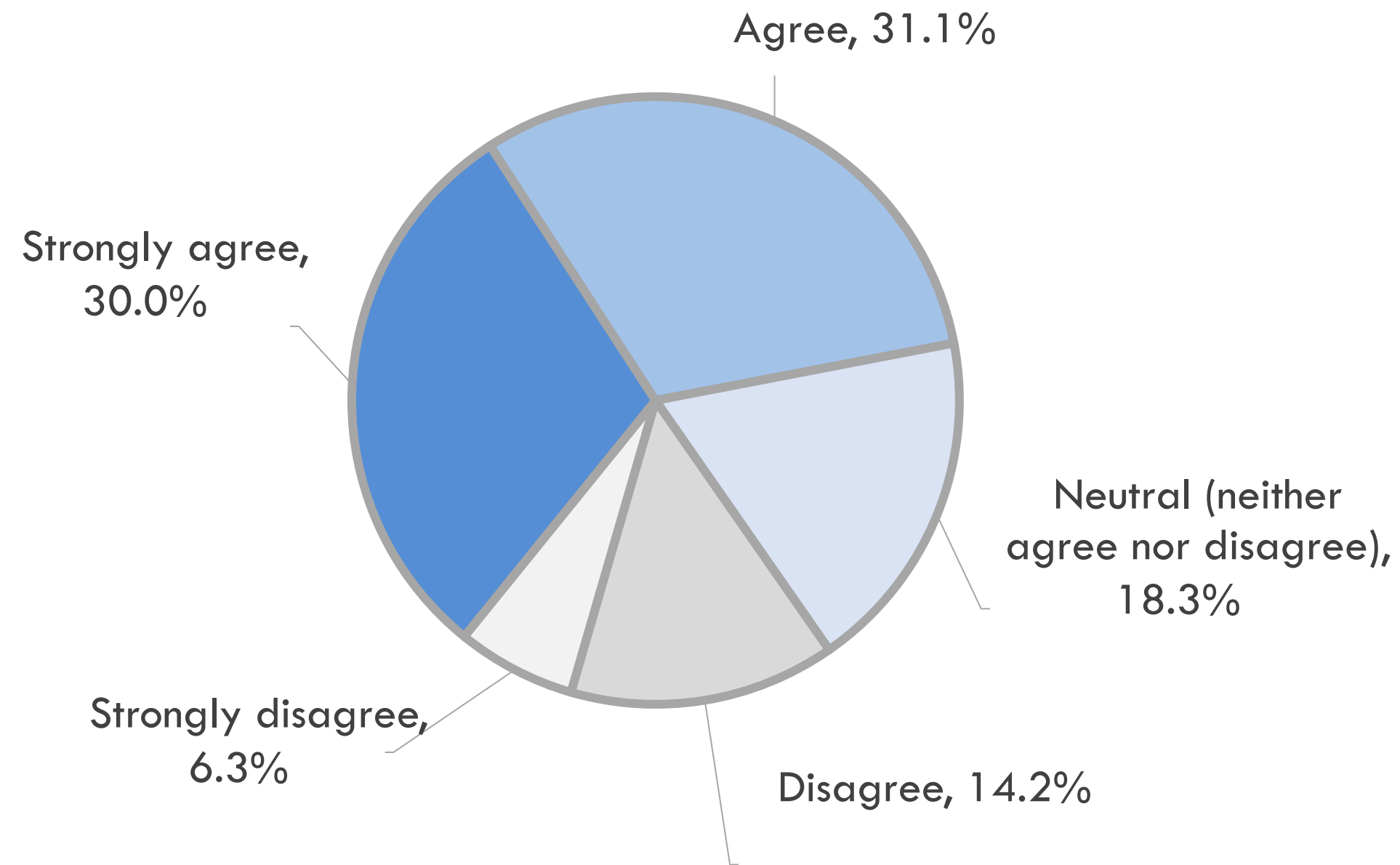
Historical data



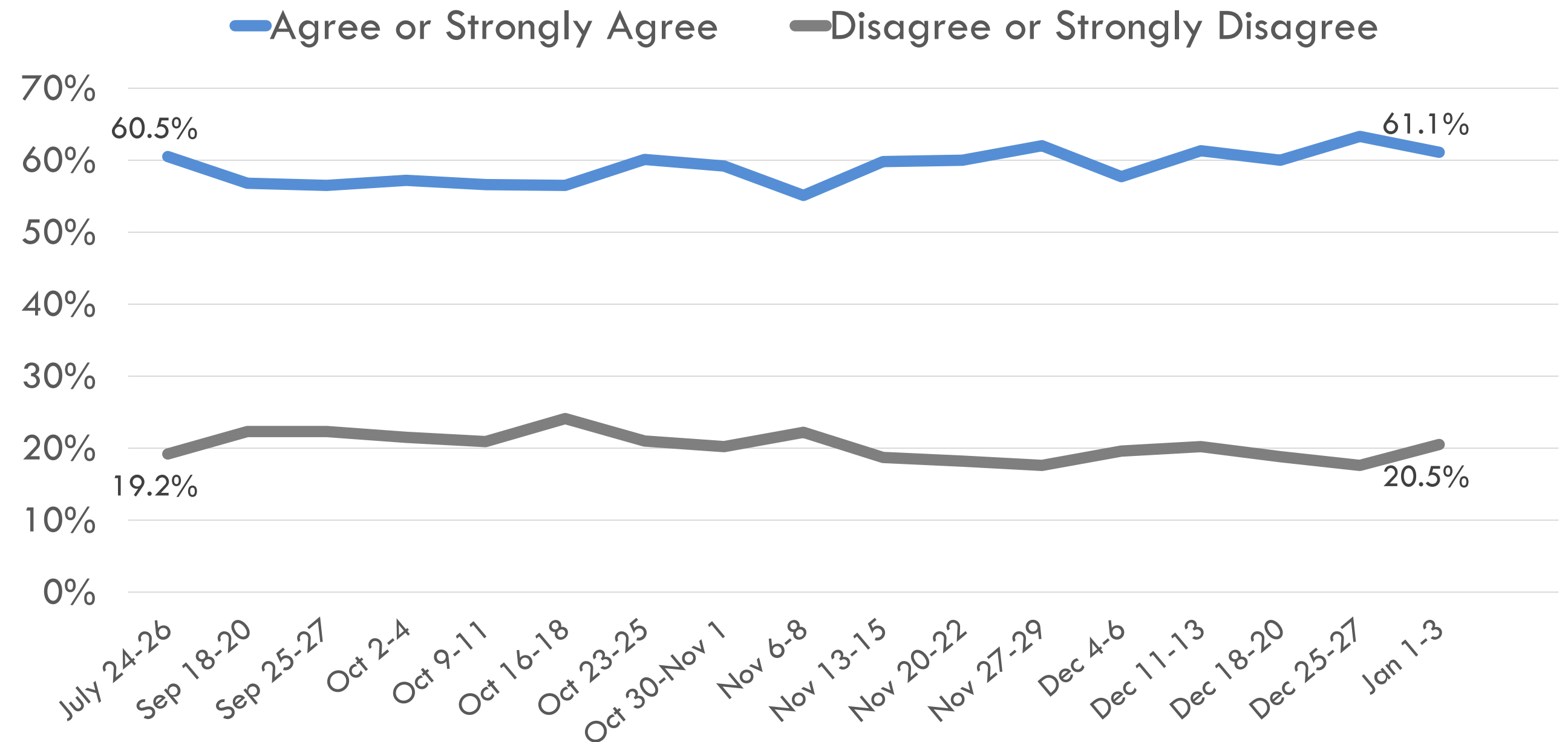
INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

How much do you agree with the following statement?

Statement: If I were to travel now for leisure, I would not be able to fully enjoy it.



Historical data

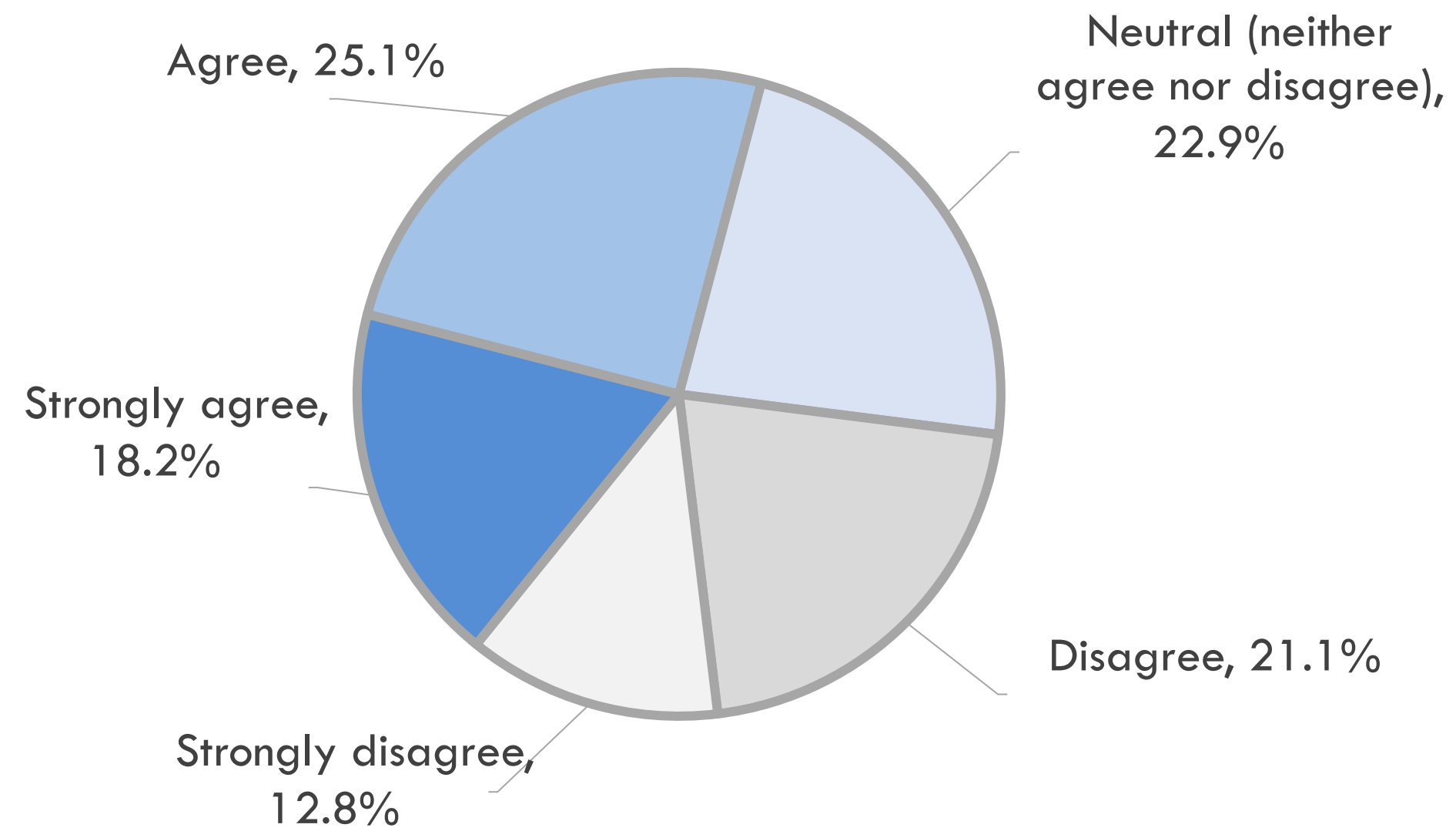


(Base: Waves 20, 28-43 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

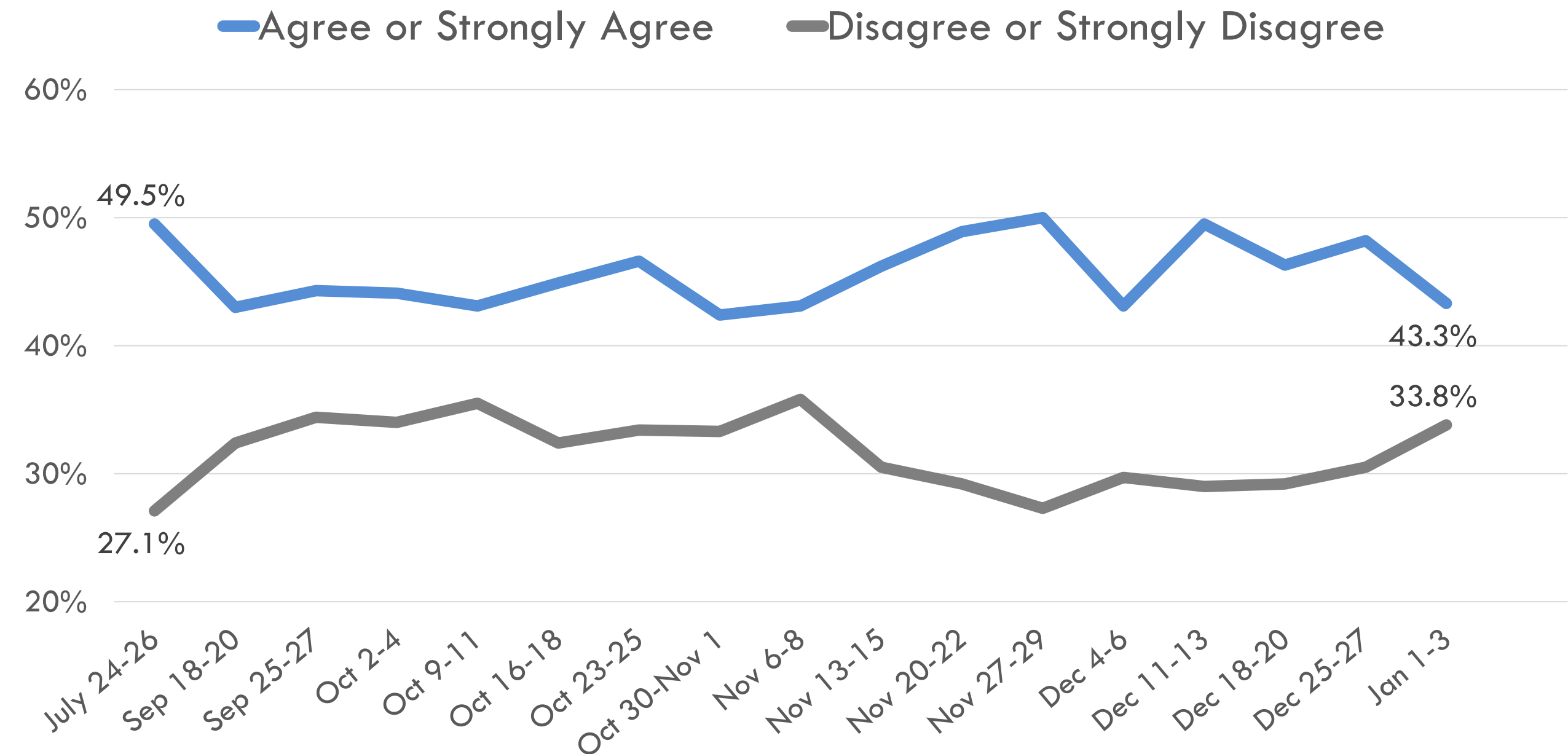
LOSS OF INTEREST IN TRAVEL

How much do you agree with the following statement?

Statement: I have lost my interest in/taste for traveling for the time being.



Historical data

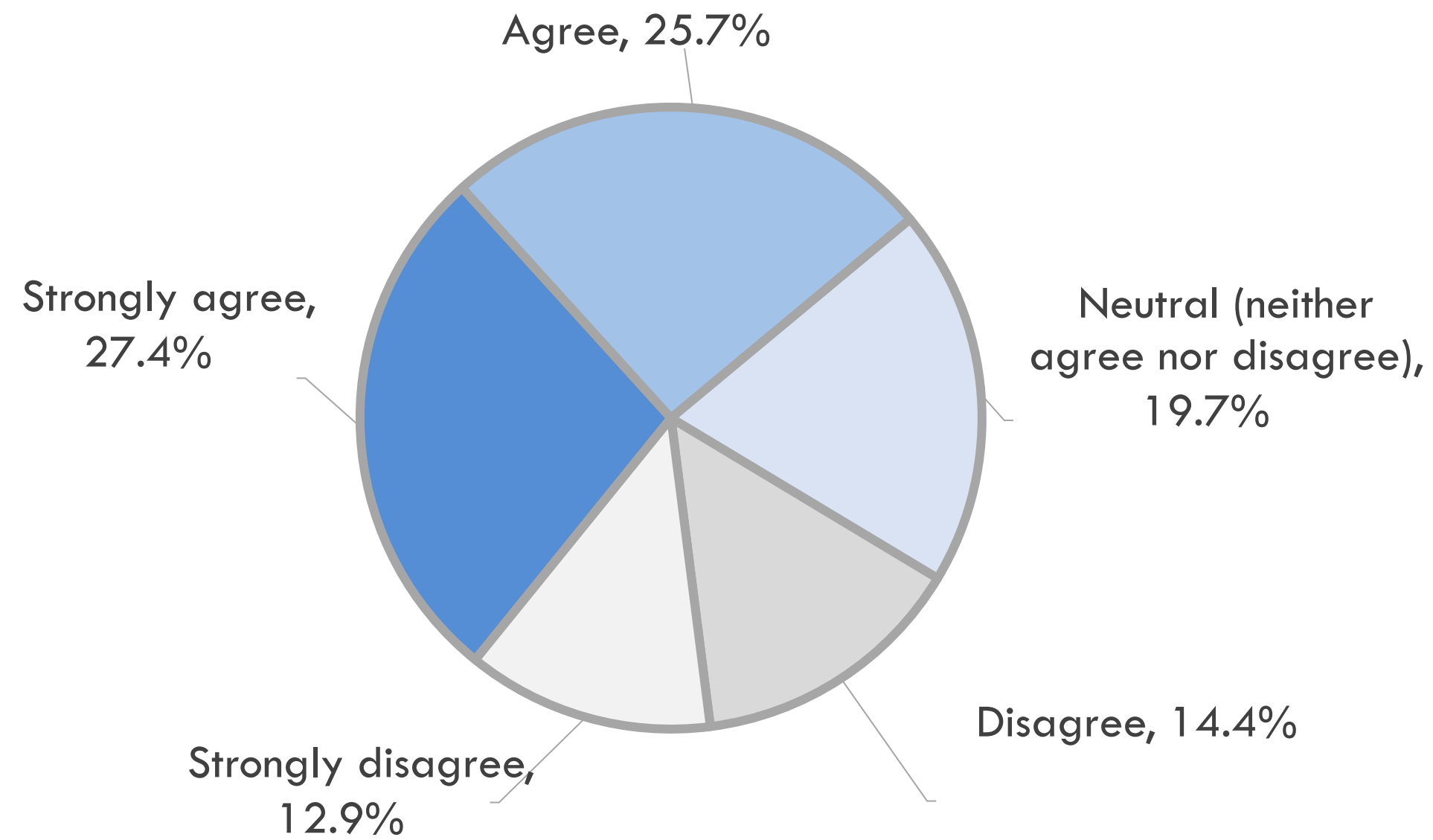


(Base: Waves 20, 28-43 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)

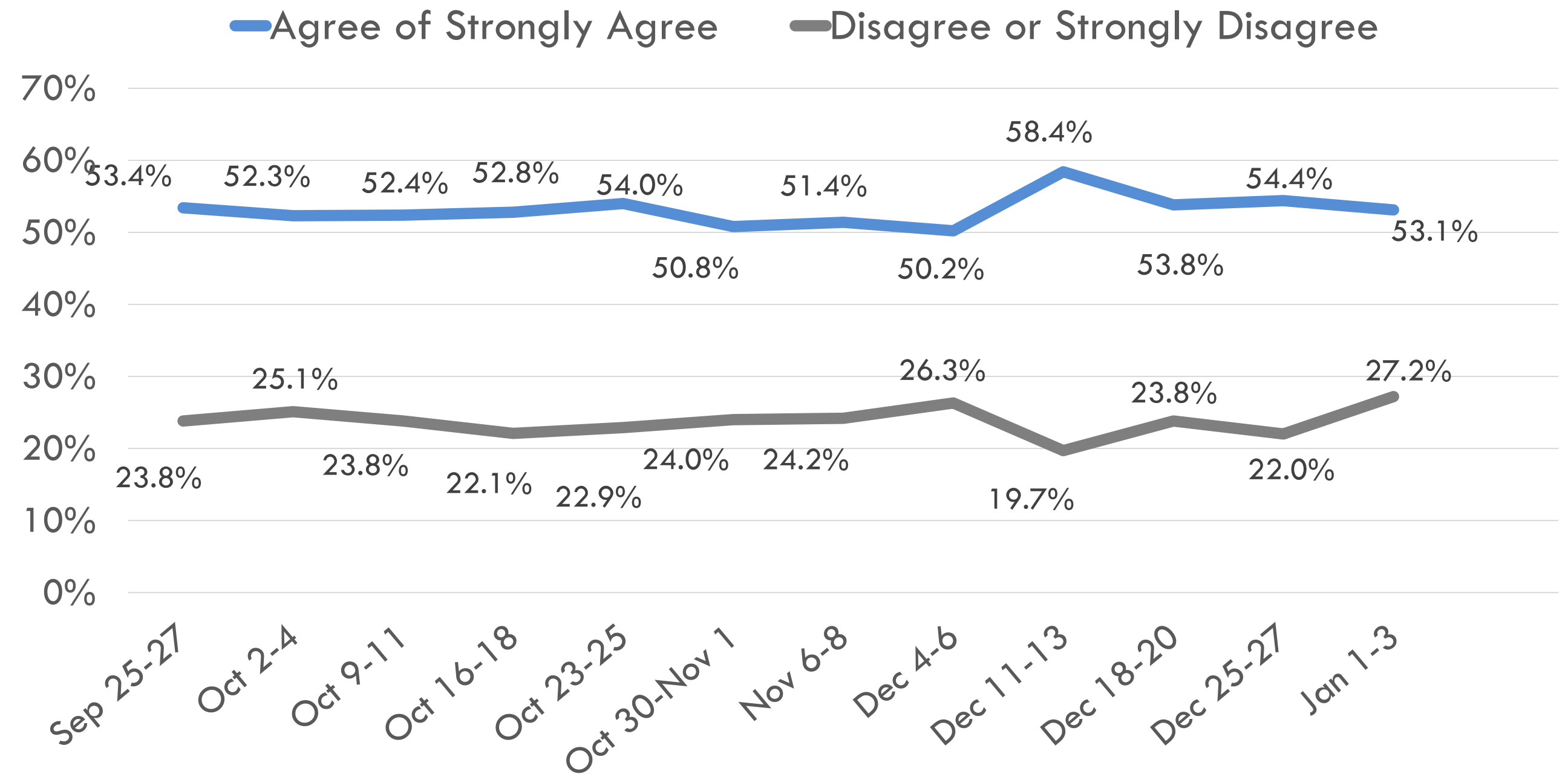
TRAVEL AS AN ESSENTIAL NEED ONLY

How much do you agree with the following statement?

Statement: Due to the Coronavirus situation, I believe travel should be limited to essential needs only.



Historical data



(Base: Waves 29-35, 39-43 data. All respondents, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,204, 1,206, 1,201, 1,207 and 1,206 completed surveys.)



Coronavirus Travel Sentiment Index

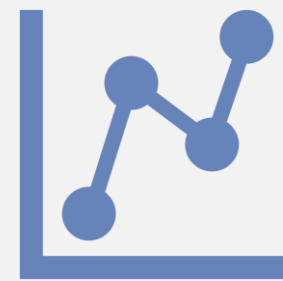
Measuring the Potential Influence of Travel Marketing

Highlights from the Week of January 4th

What is a Predictive Index?



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



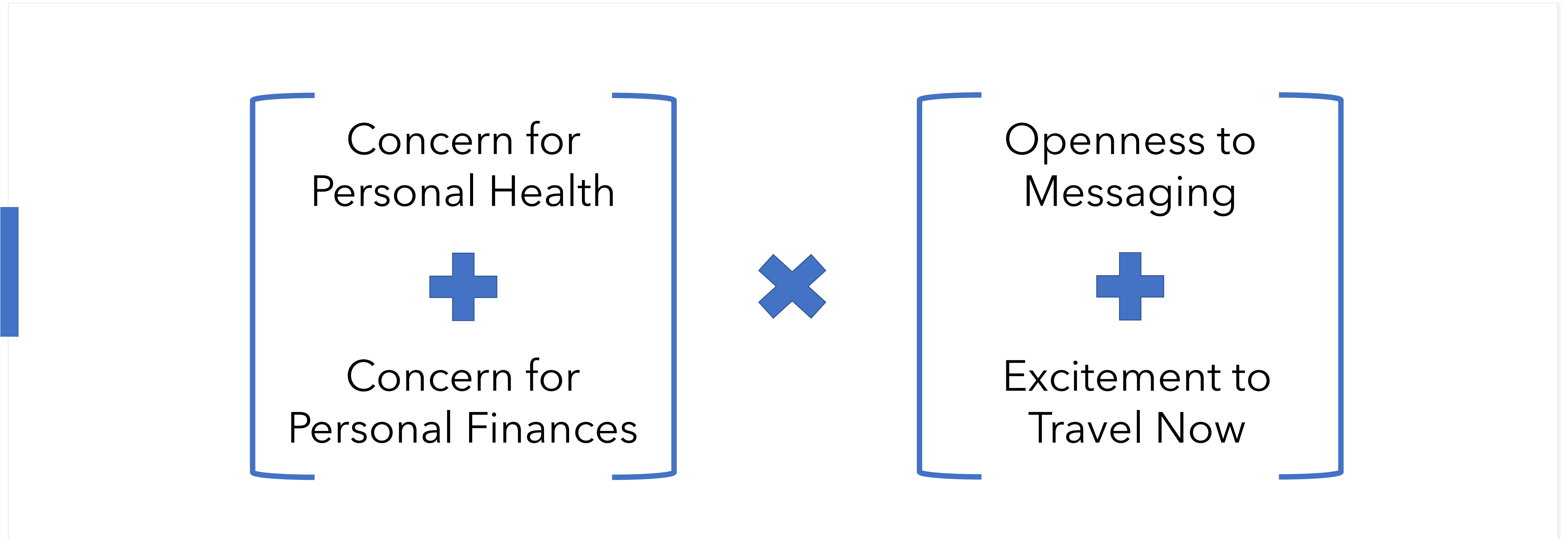
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

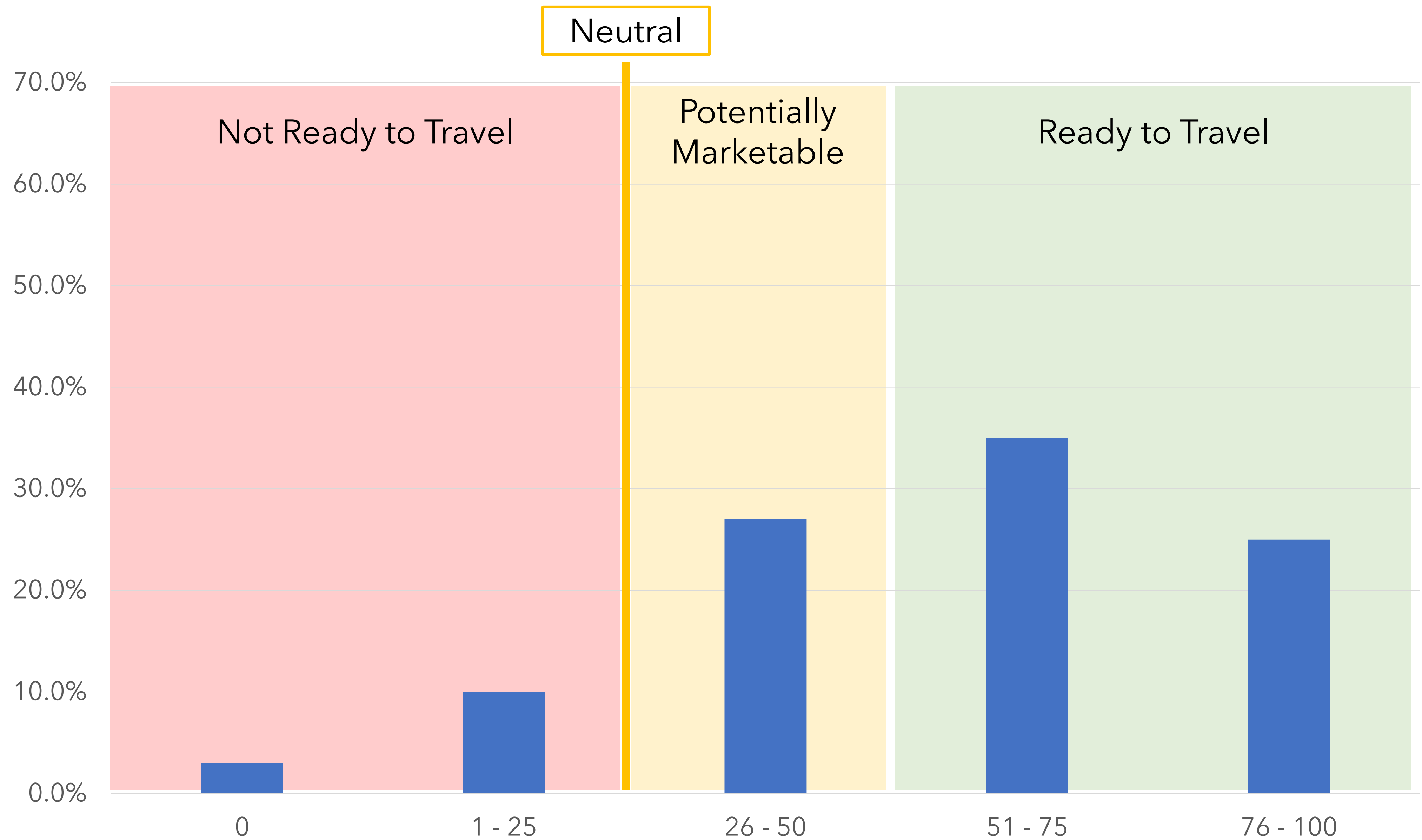
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



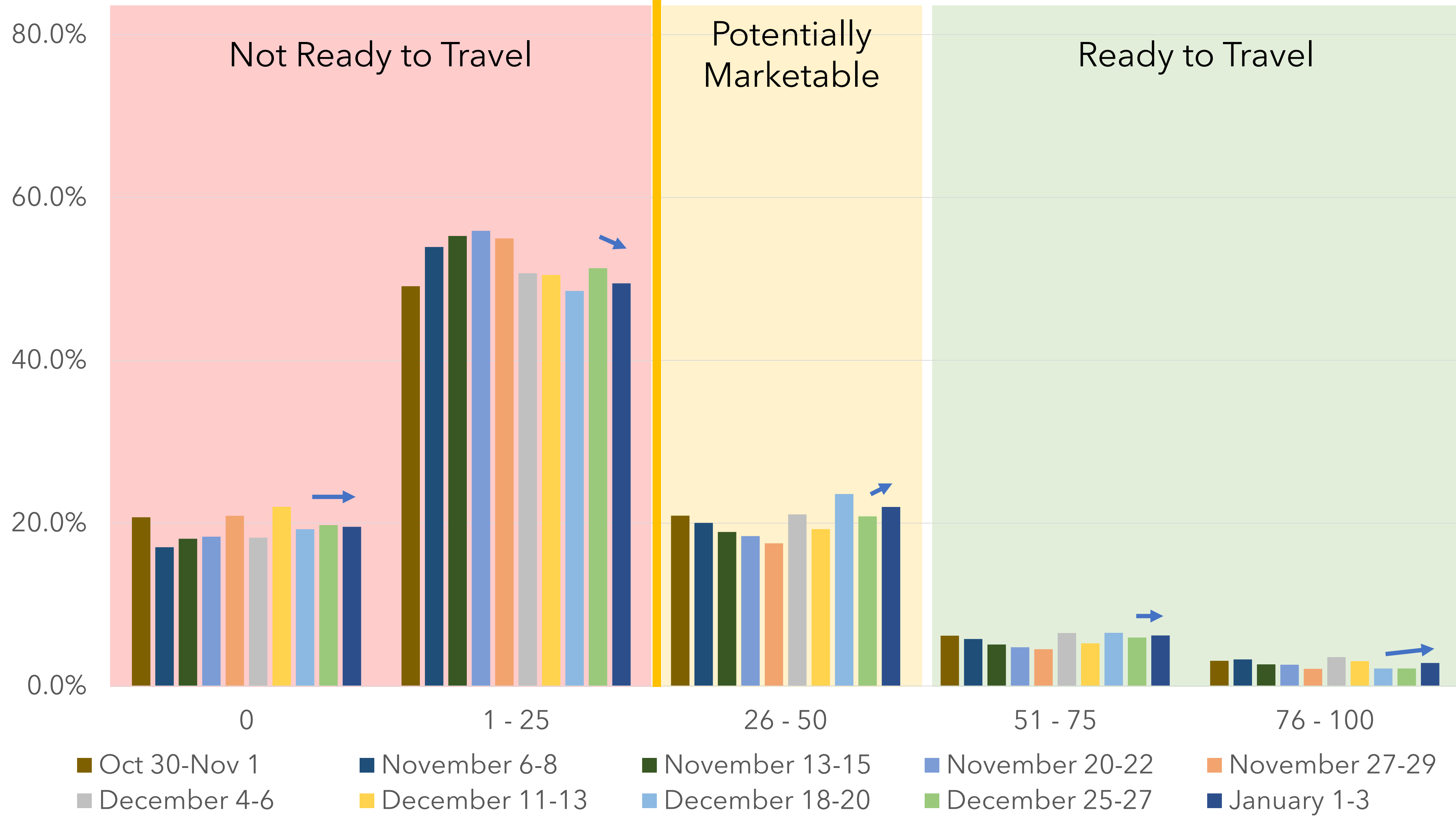
*Normalized to a 100pt scale

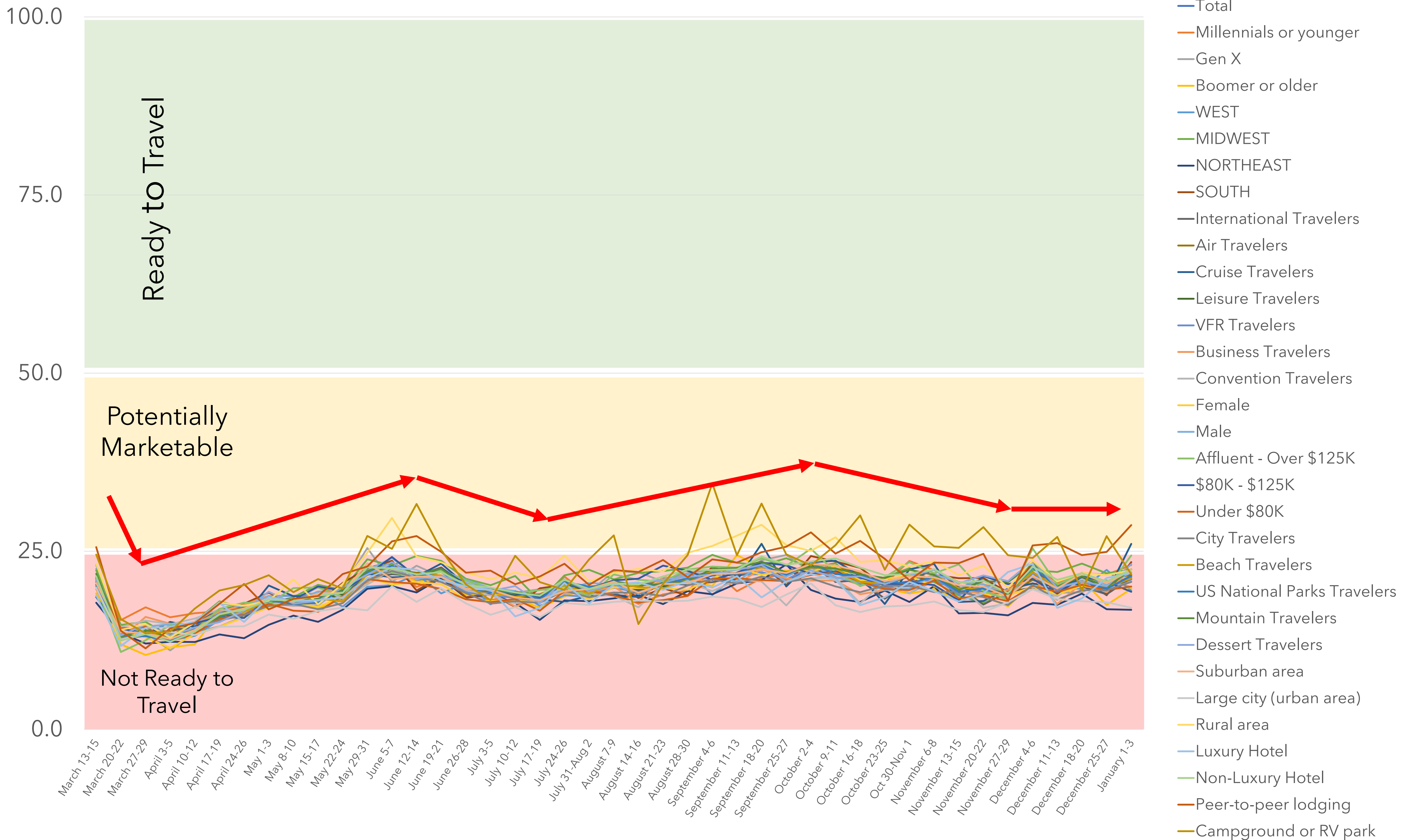
Healthy Travel Outlook



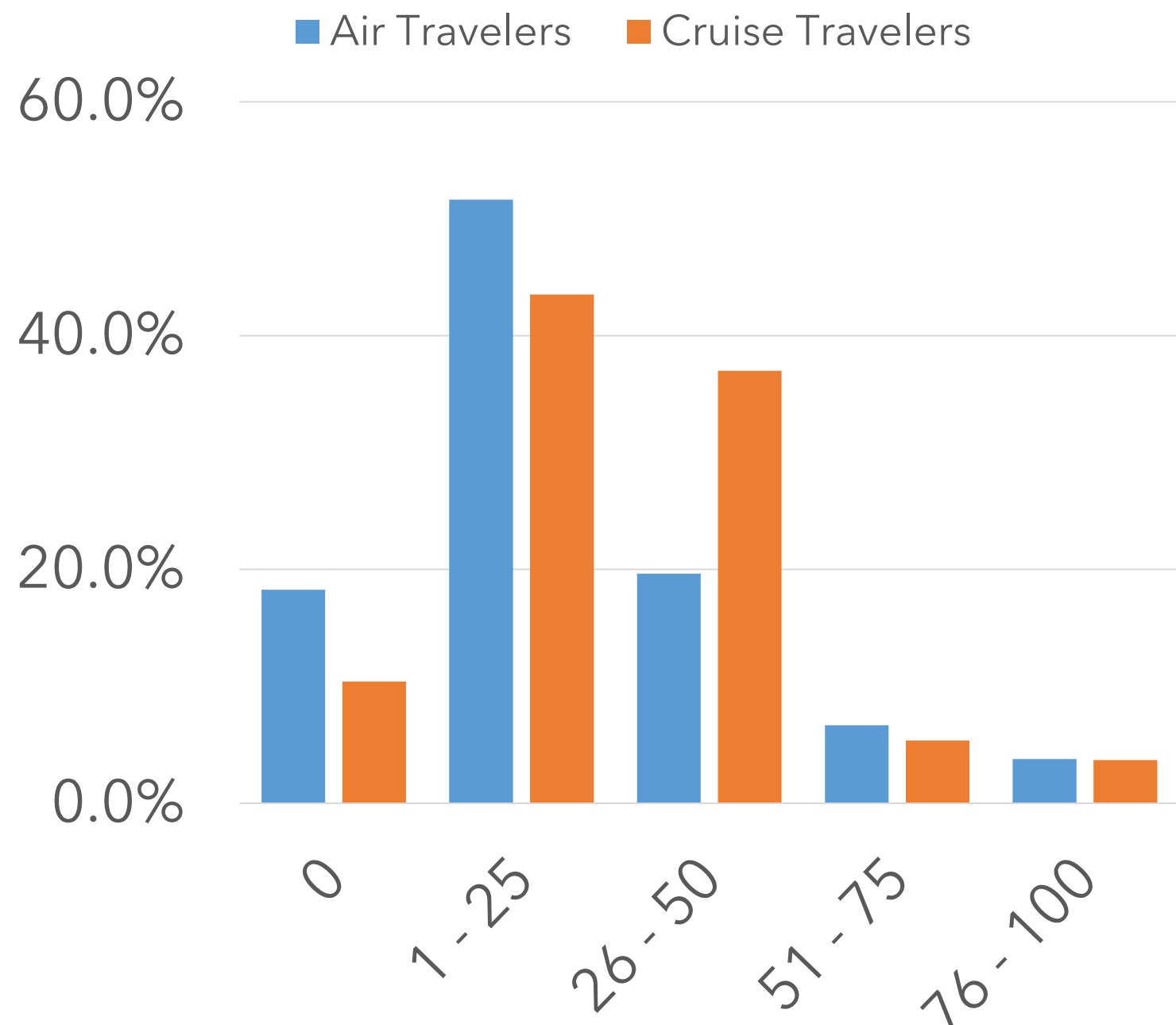
Travel Outlook

Neutral

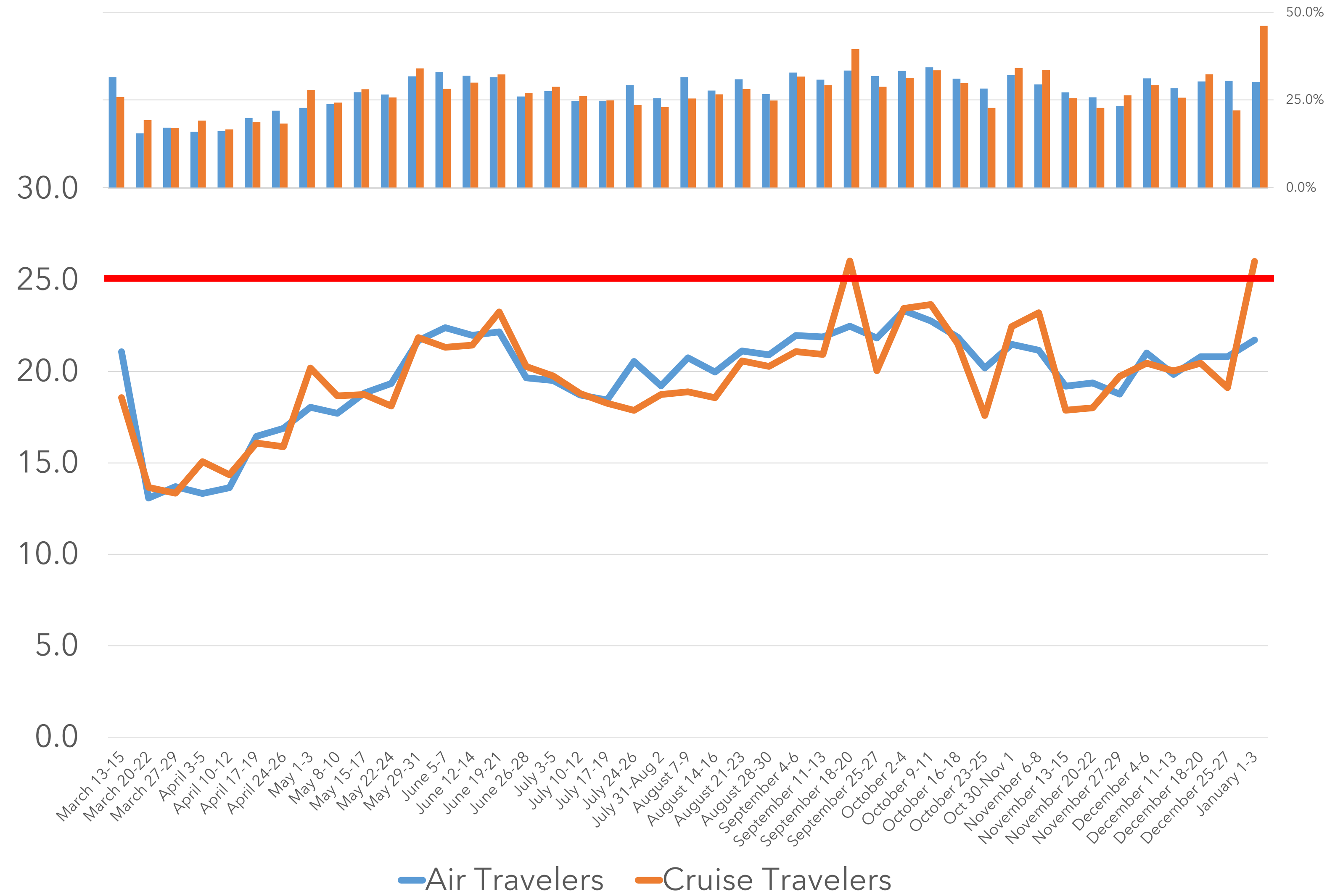




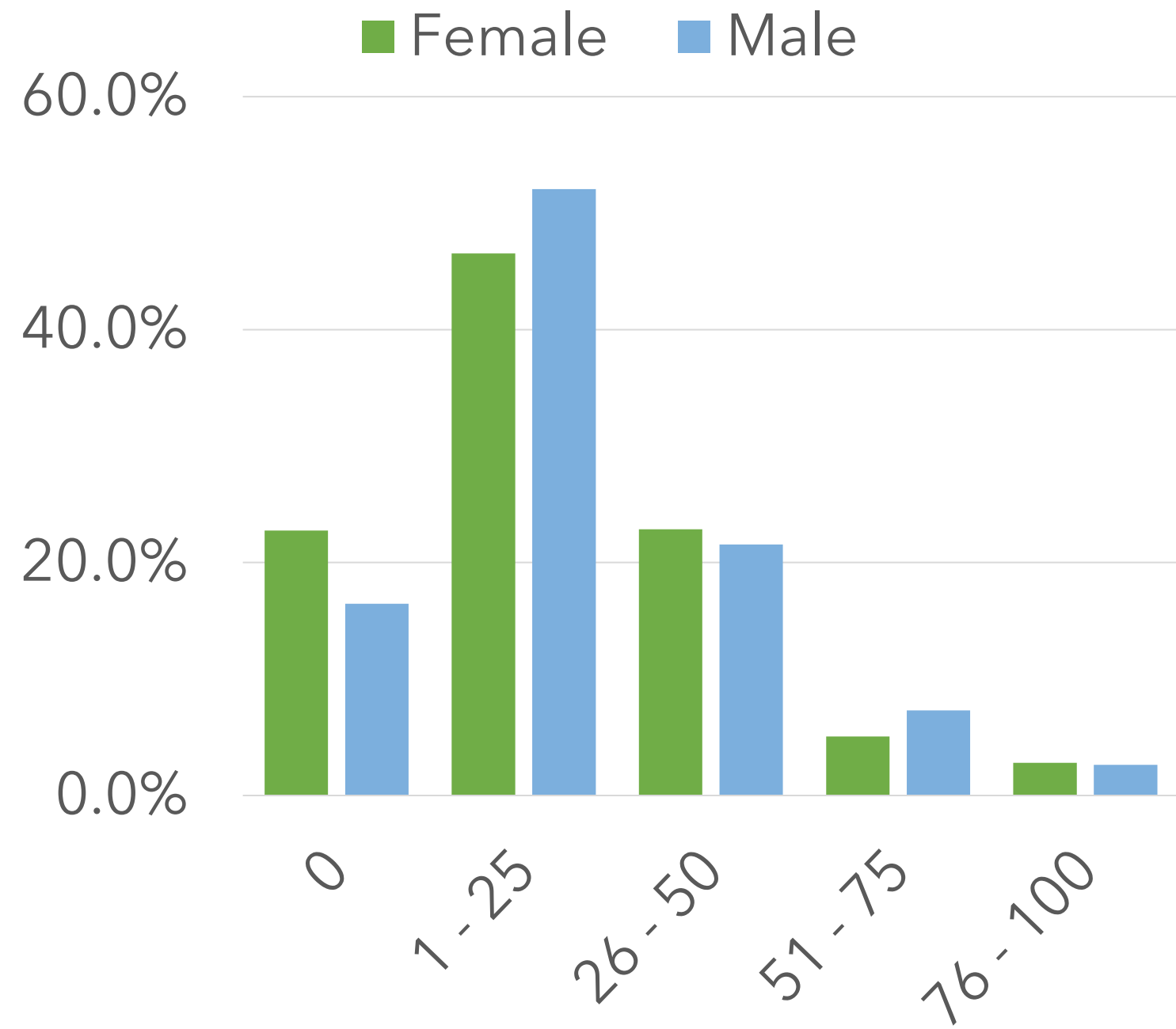
Airline and Cruise Travelers



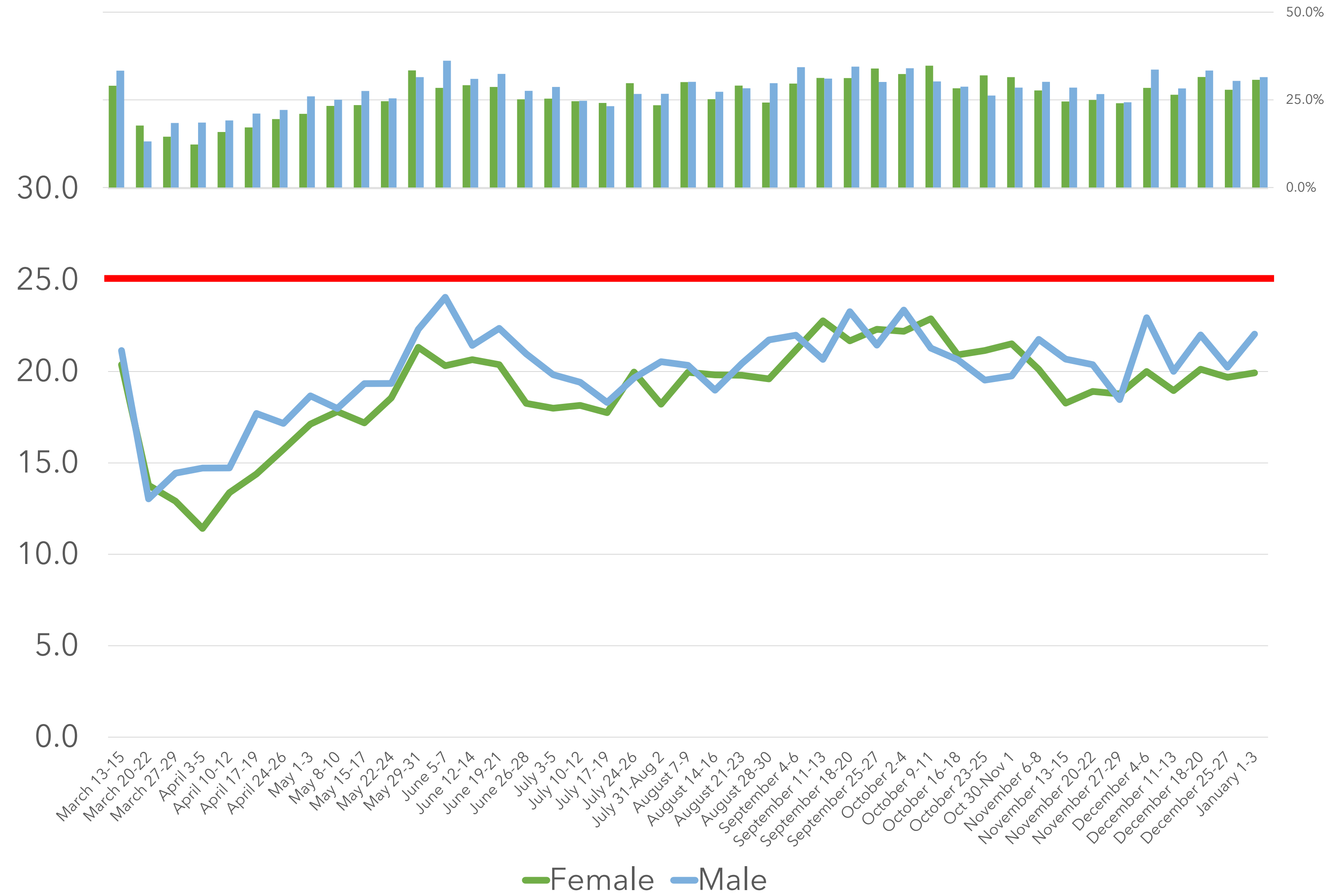
Percent Potentially Marketable (Index Above 25)



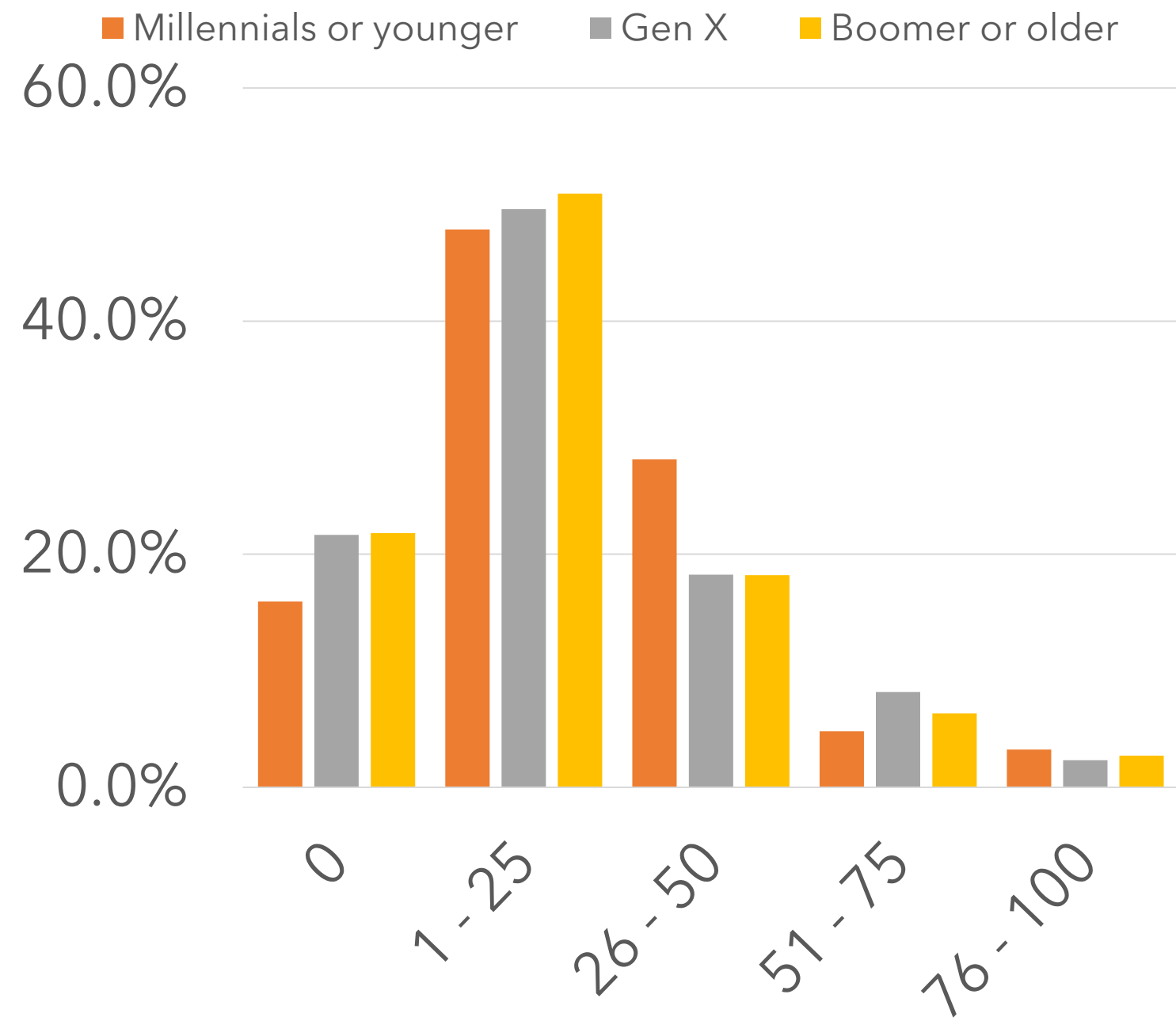
Gender



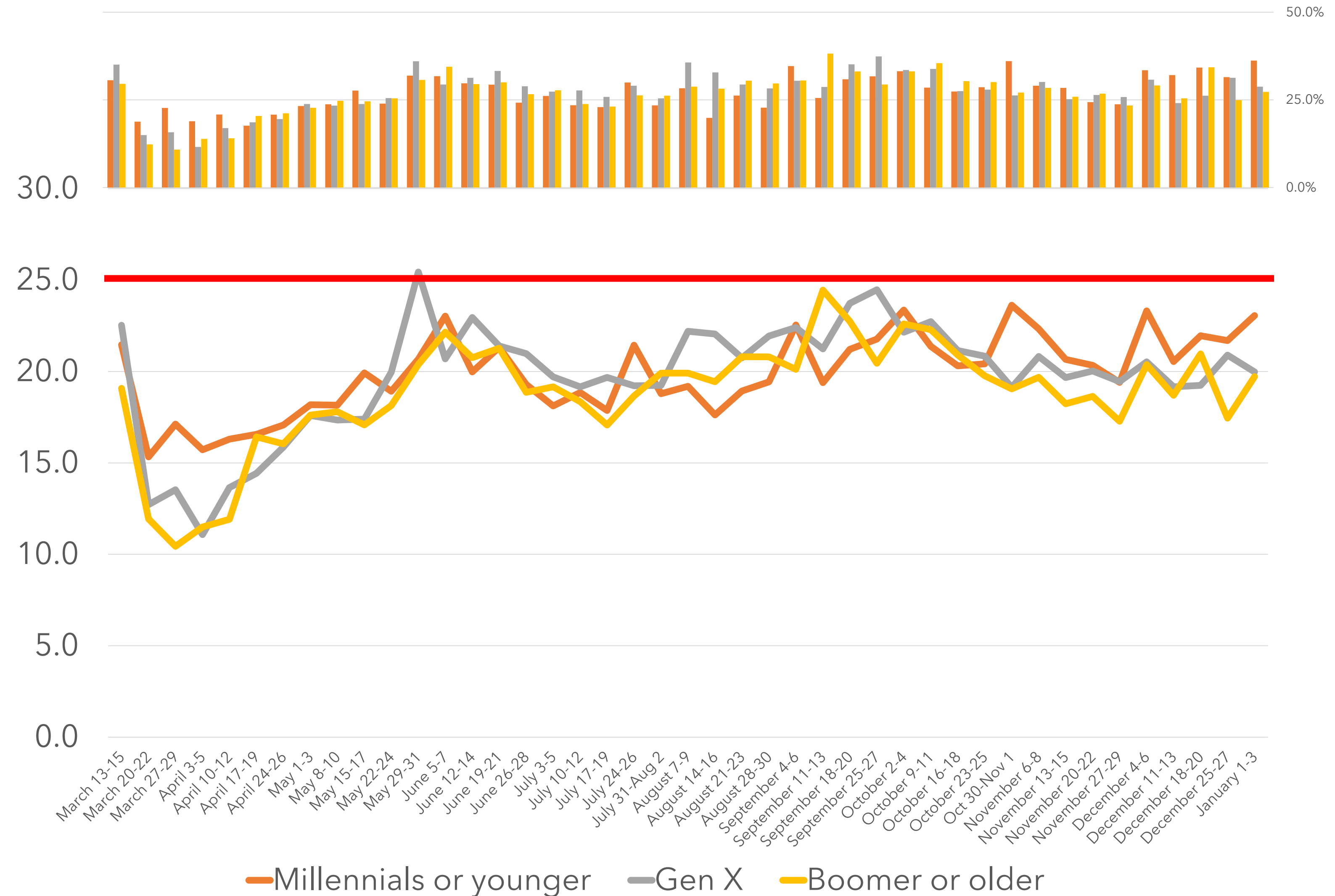
Percent Potentially Marketable (Index Above 25)



Generation

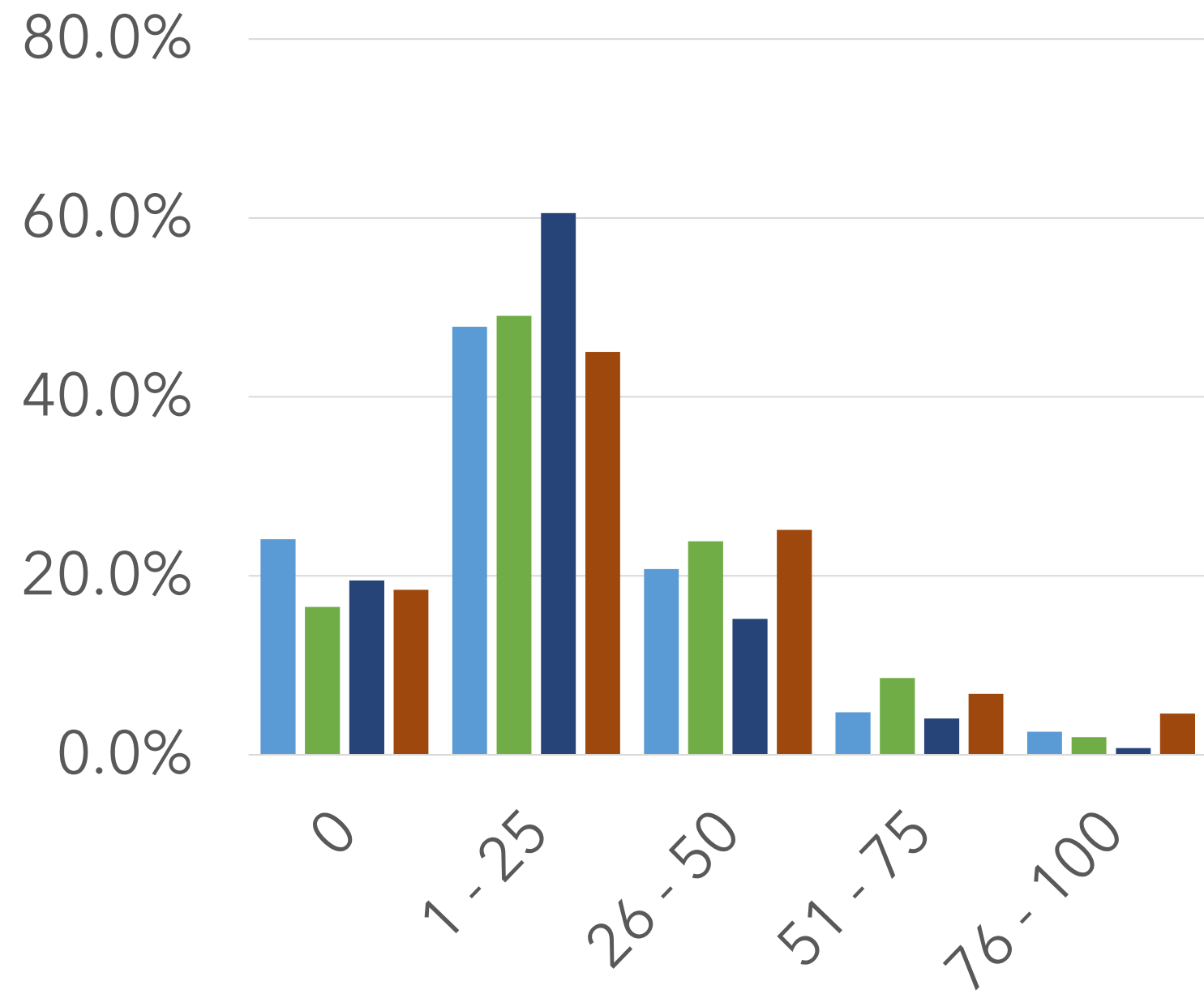


Percent Potentially Marketable (Index Above 25)

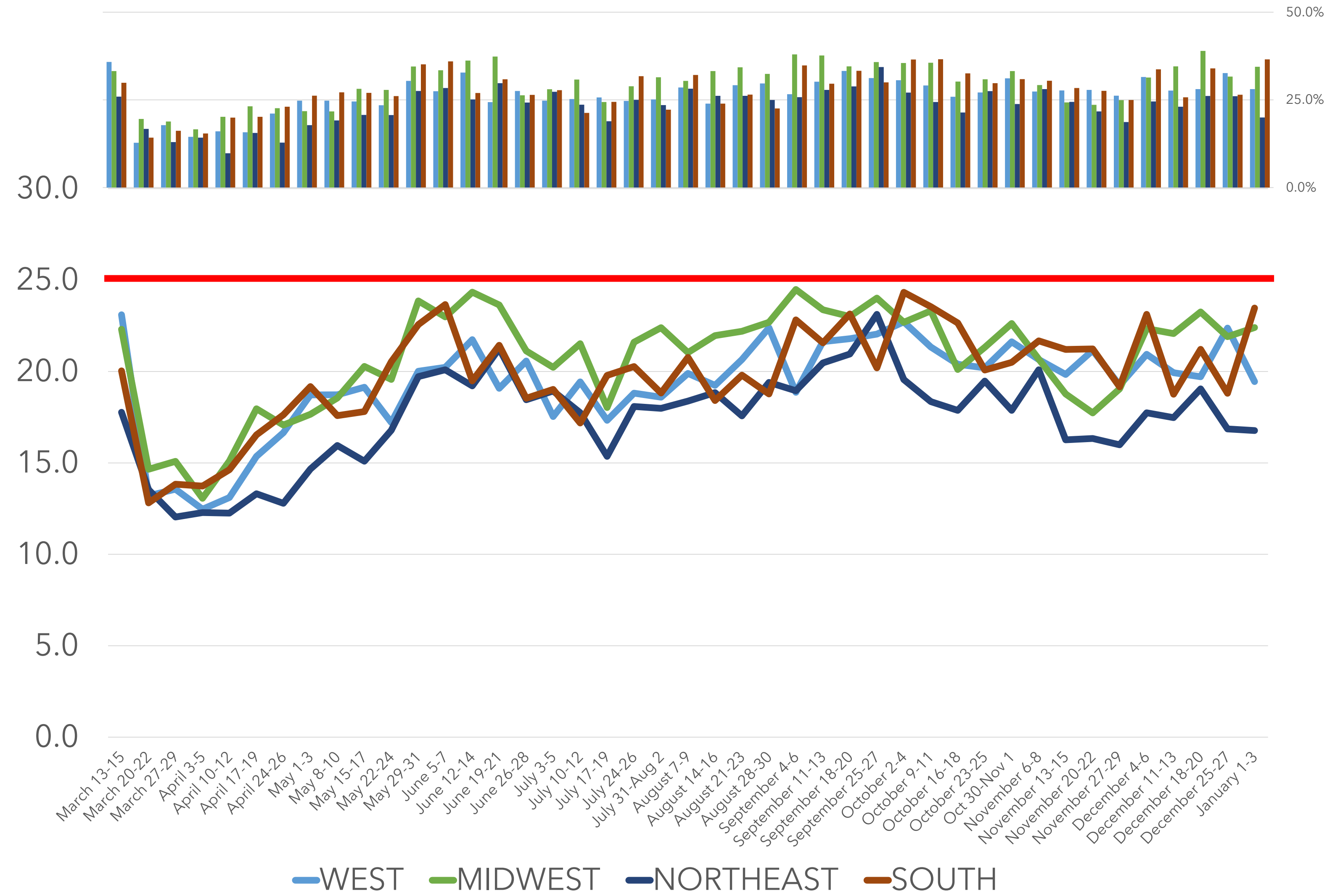


US Regions

WEST MIDWEST NORTHEAST SOUTH



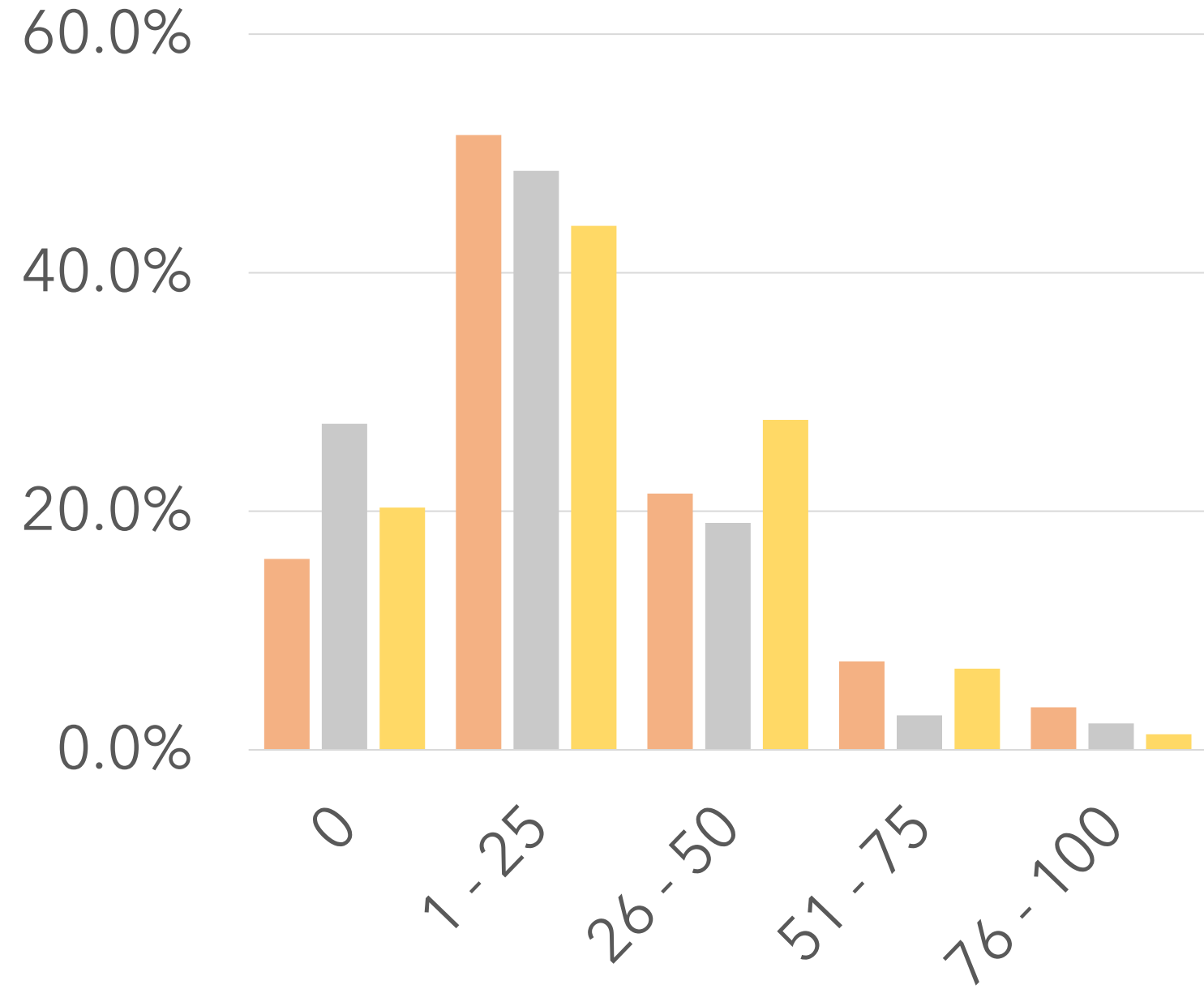
Percent Potentially Marketable (Index Above 25)



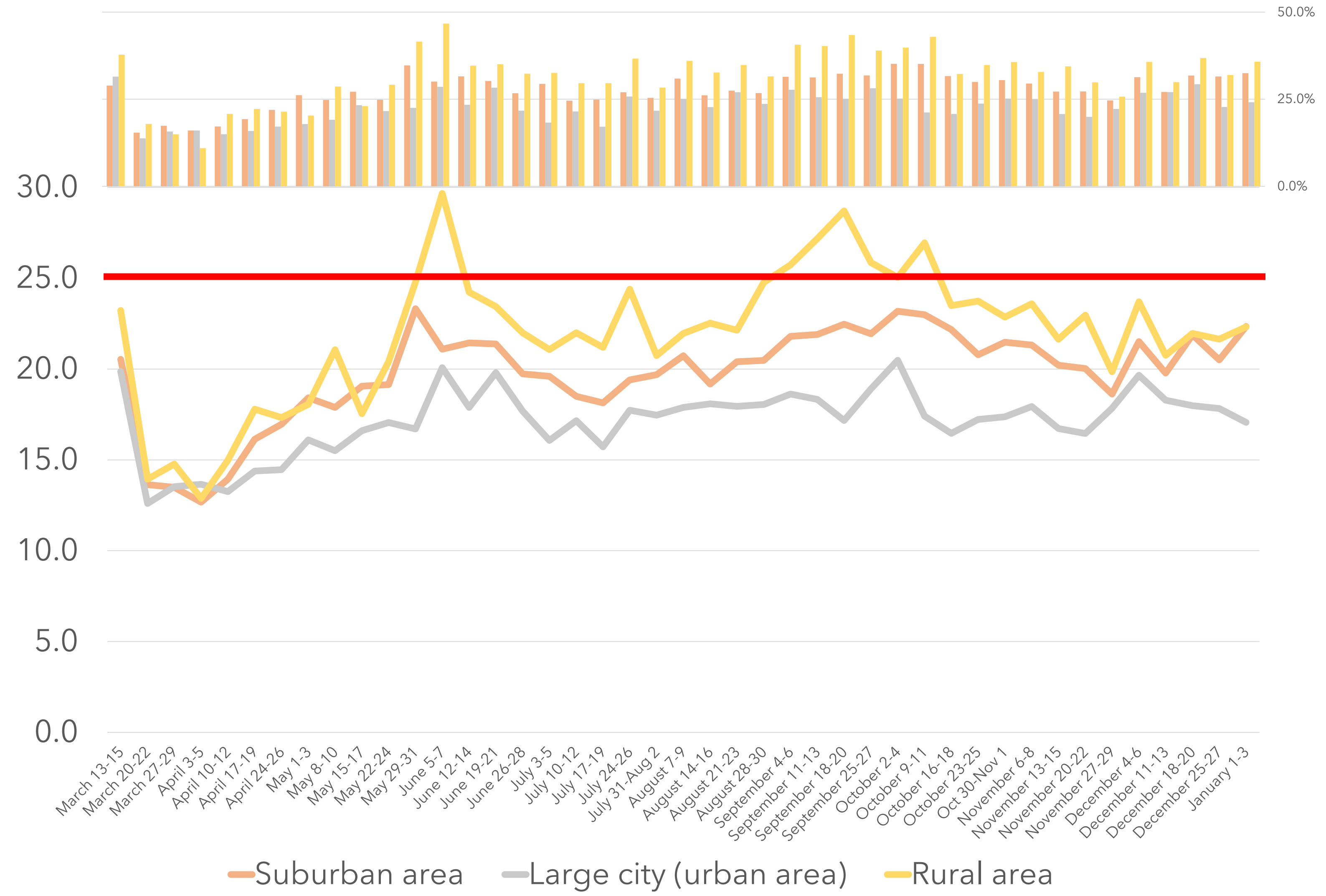
WEST MIDWEST NORTHEAST SOUTH

Residence Type

Suburban area Large city (urban area) Rural area

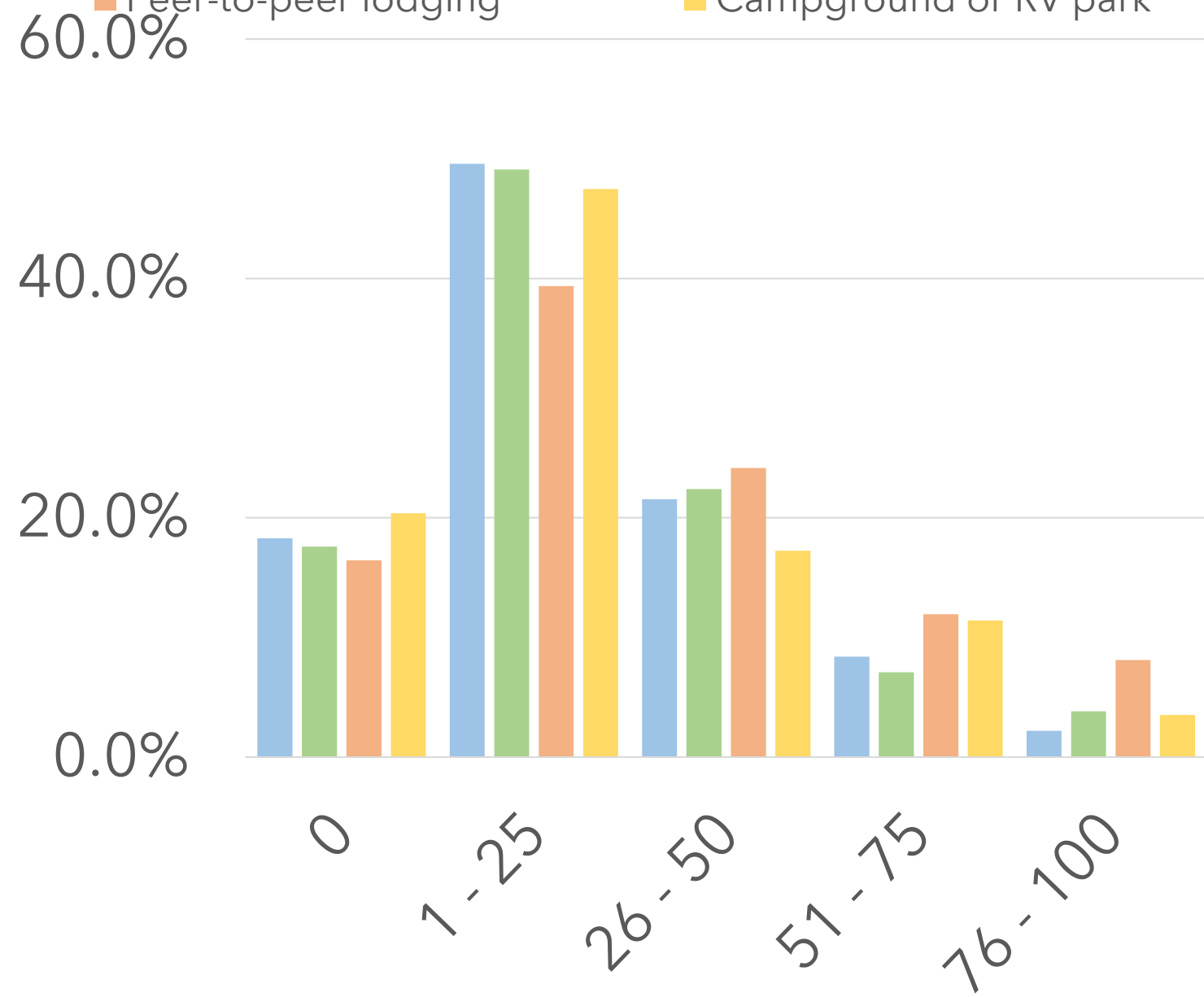


Percent Potentially Marketable (Index Above 25)

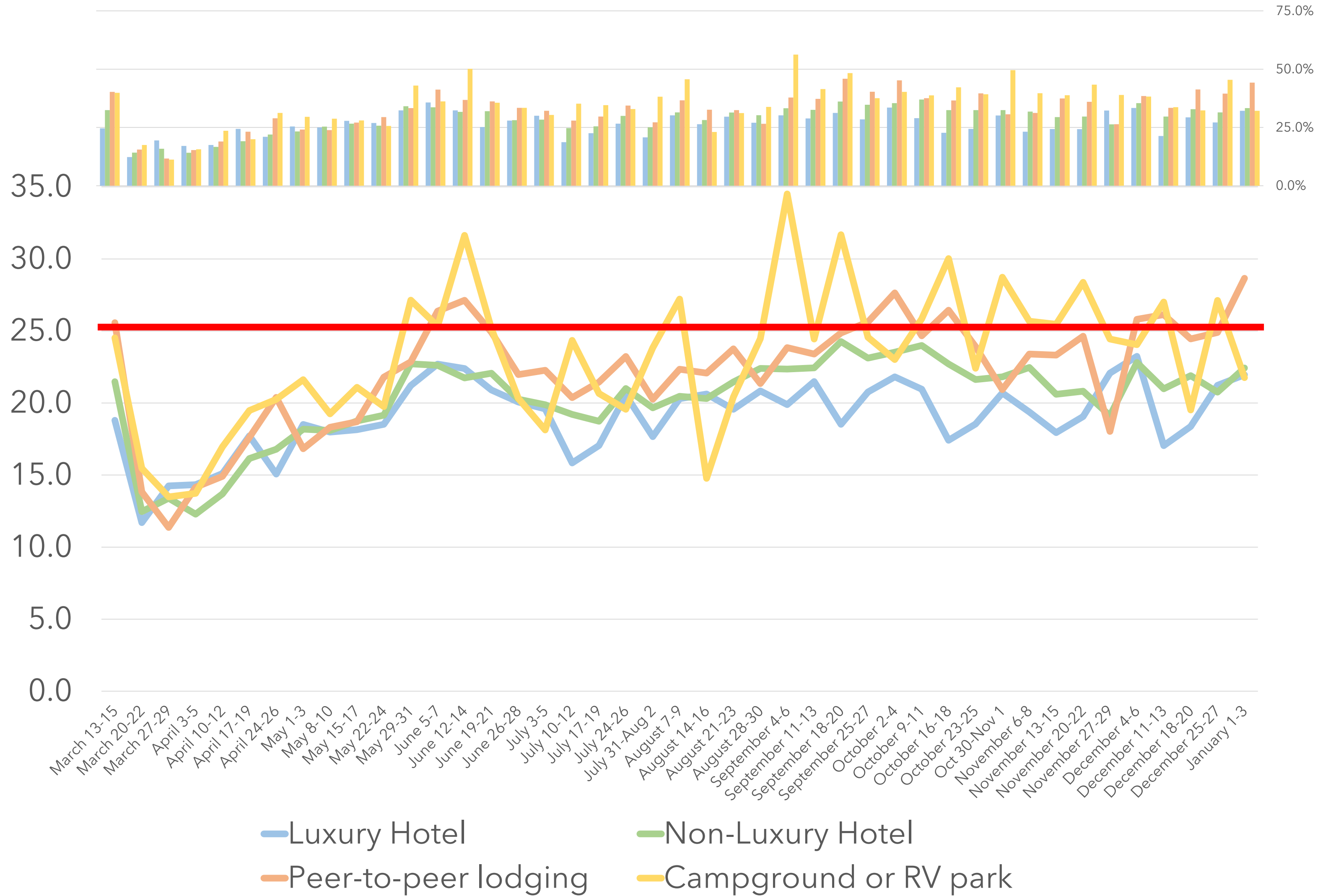


Lodging Preference

■ Luxury Hotel
 ■ Non-Luxury Hotel
 ■ Peer-to-peer lodging
 ■ Campground or RV park



Percent Potentially Marketable (Index Above 25)



ACCESSING DATA IN THE ONLINE DASHBOARD

08:54:30
VOICE FEED: NETWORK: 12.38.73

Evolution:

SECURITY

Actual vs Target

PROFILE:

PROJECT:

MISSION

ADDRESS:

Market Share

KPI: Product

FRONT-CAMERA-IP: 143.453.00

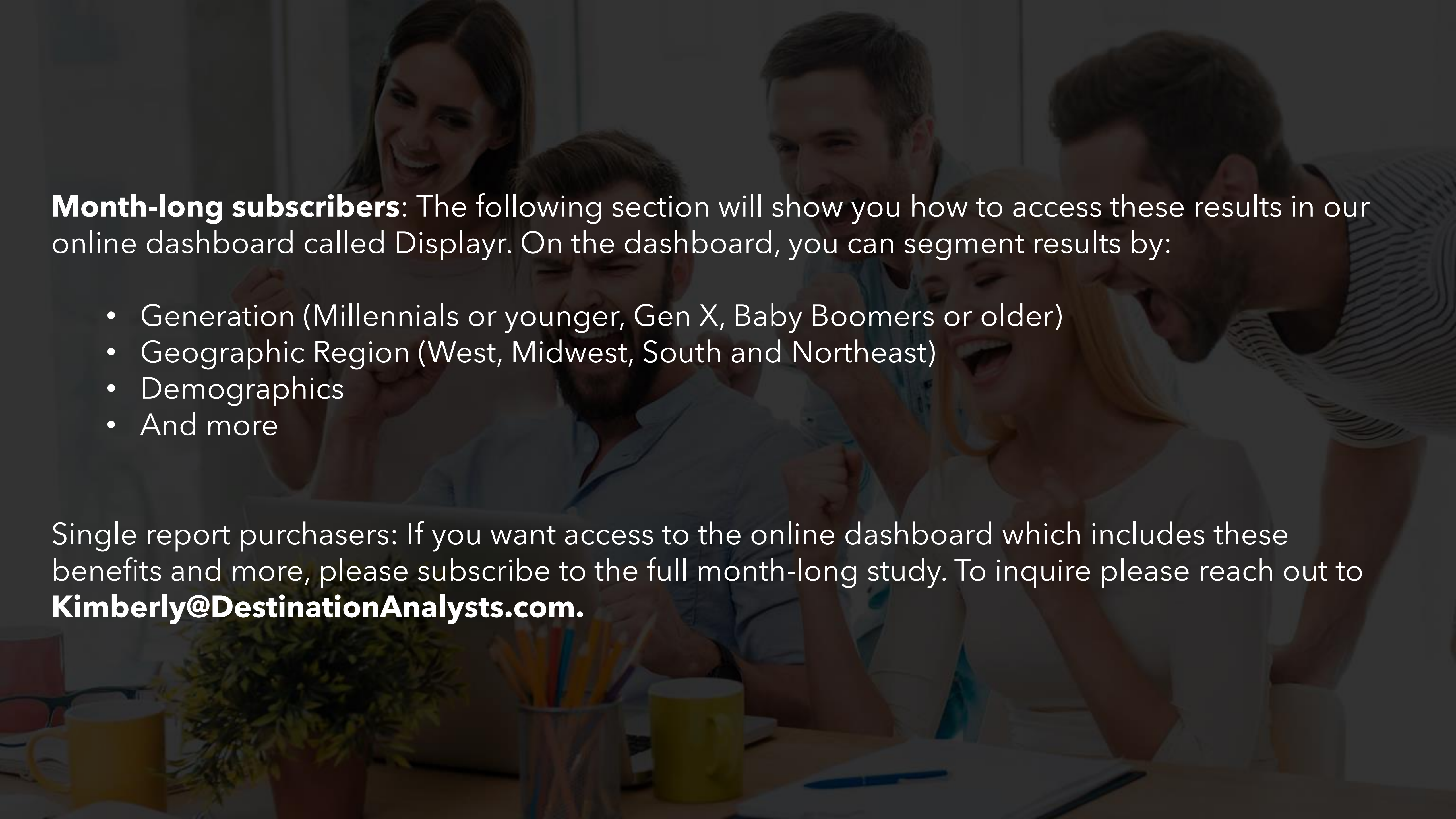
01:43:55

POWER: ON: OFF
TIME-DATE 00:38:29

Customers Satisfaction

CONTROL-AREA





Month-long subscribers: The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

- Generation (Millennials or younger, Gen X, Baby Boomers or older)
- Geographic Region (West, Midwest, South and Northeast)
- Demographics
- And more

Single report purchasers: If you want access to the online dashboard which includes these benefits and more, please subscribe to the full month-long study. To inquire please reach out to **Kimberly@DestinationAnalysts.com.**

HOW TO USE DISPLYR

Guidelines on viewing, segmenting
and exporting data from the
dashboard.



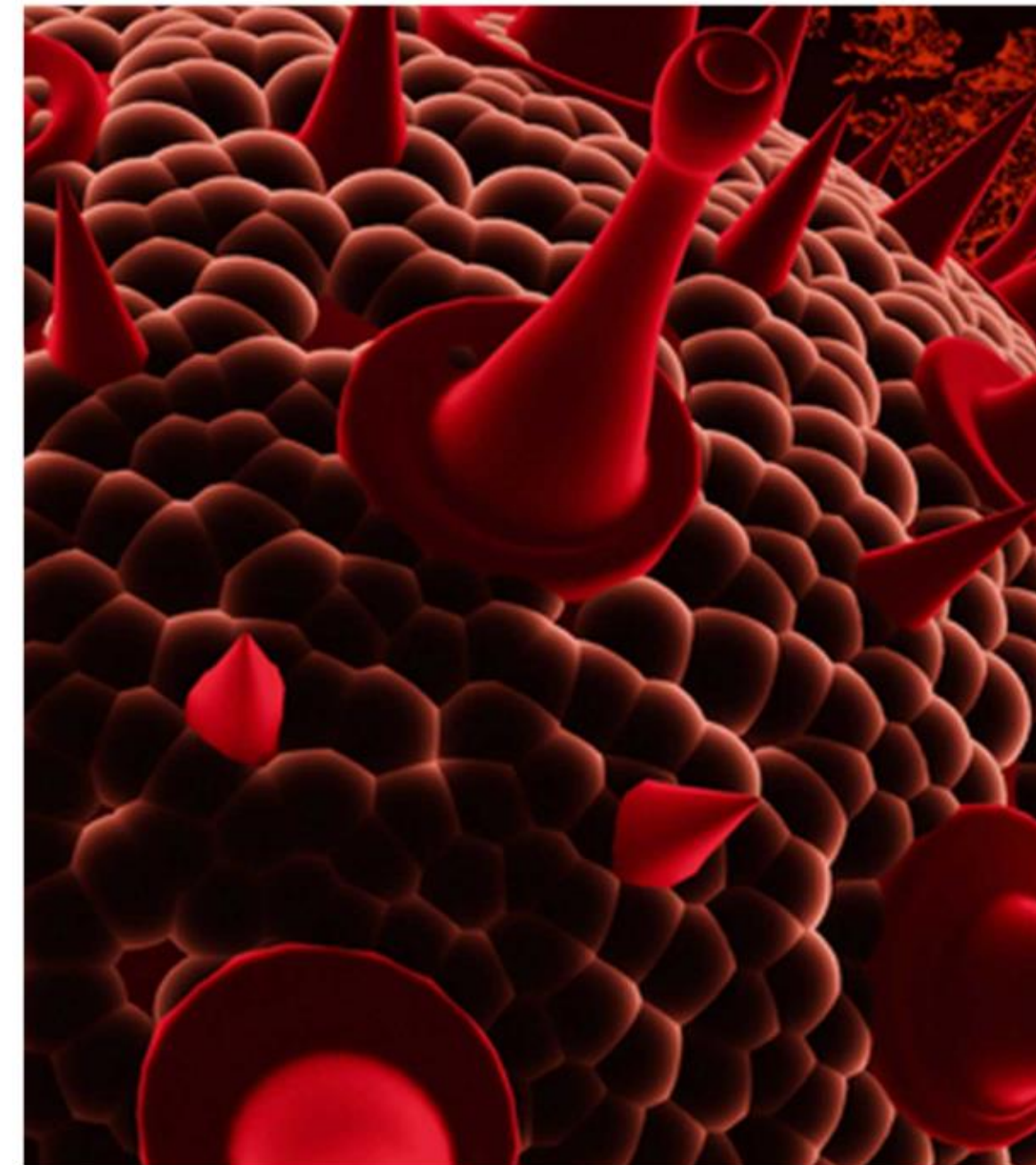
60%	CTMX	0.45	▲	+0.45%
	FTR	-0.23	▼	-2.34%
	CSCO	-1.01	▼	-1.89%
	CHK	0.02	▲	+0.21%
	AAPL	+2.58	▲	+3.05%
	PRTG	-0.14	▼	-1.42%
	AMZN	-0.73	▼	-0.90%
	TSLA	+1.08	▲	+5.12%
	AVGO	-0.87	▼	-3.88%
	SIRI	-0.65	▼	-1.37%

NAVIGATING THE DASHBOARD:

Toggle between the report sections by clicking on the header(s) in this navigation pane

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

Search...

Filters ▾ Export ▾ ?

- 65% +

NAVIGATING THE REPORT:

To view submenu data points in a particular section, click on the arrow to the left of the heading.

This allows you to jump to specific data points without having to scroll through the entire report.

Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ? - + %  

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations
 - Anticipated Change in Coronavirus S
 - Anticipated Change in Coronavirus S
 - Perceived Safety of Travel Activities
 - Perceived Safety of Travel Activities -
 - Avoiding Travel Until the Crisis Blow:
 - Avoiding Travel Until the Crisis Blow:
 - Expectations for Summer Travel Sea
 - Expectations for Summer Travel Sea
 - Staycations as a Replacement for Va
 - Staycations as a Replacement for Va
 - Road Trips as a Replacement for Air
 - Road Trips as a Replacement for Air
 - Regional Trips as a Replacement for
 - Regional Trips as a Replacement for
 - Avoiding Conferences or Conventior
 - Avoiding Conferences or Conventior
 - Avoiding International Travel
 - Avoiding International Travel - Break
 - Comfort Enjoying Home Community
 - Comfort Enjoying Home Community
 - Discounts Drive Interest in Travel
 - Discounts Drive Interest in Travel - B
 - Upcoming Travel Plans



FILTERING THE REPORT:

To segment the results by a specific group (generational, geographical, etc.)
Click on "Filters" in the top right corner.



IMPORTANT NOTE: When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

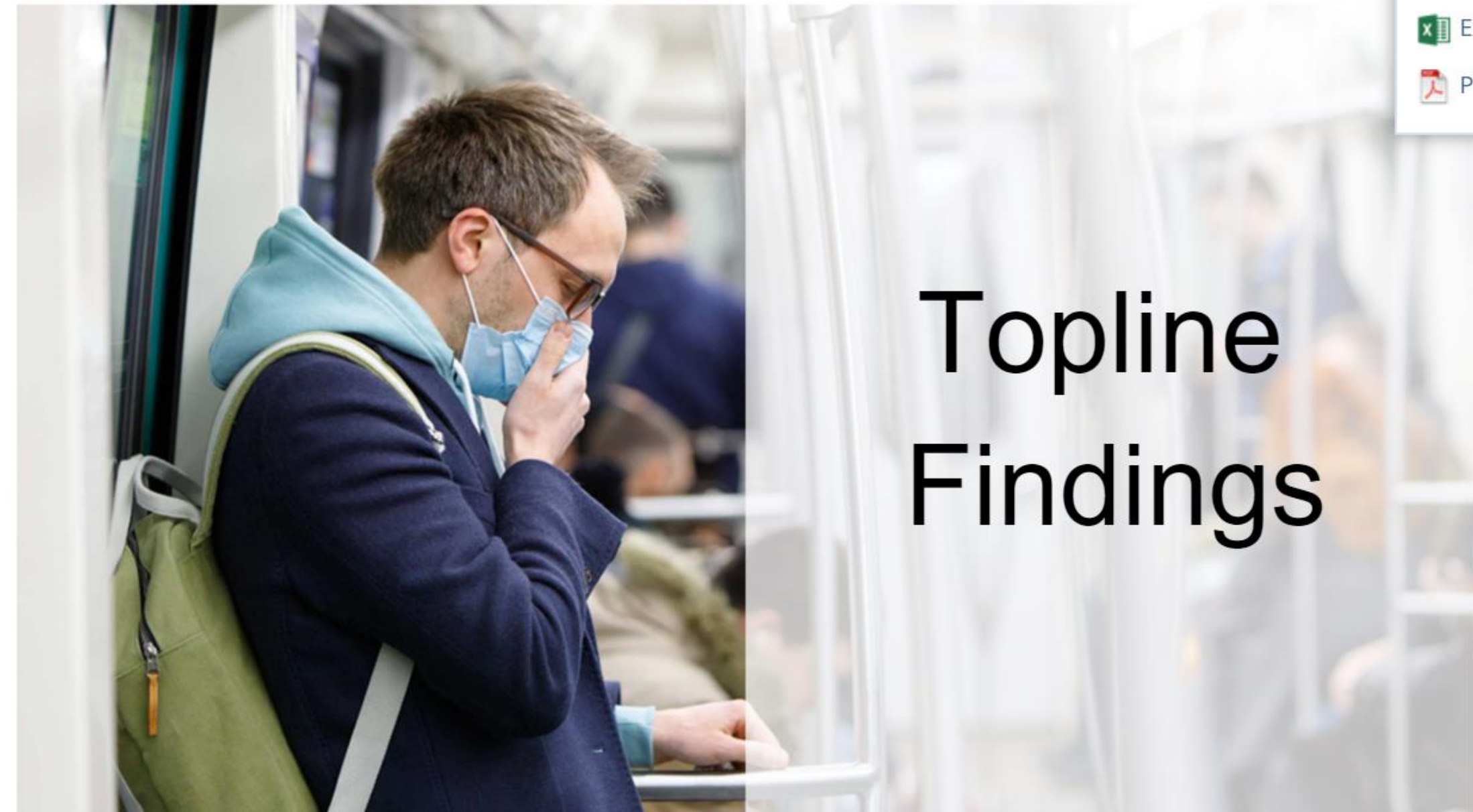
EXPORTING THE DATA:

To share the results with others in your organization, click on "Export" in the top right corner and select your preferred file type (PowerPoint, Excel or PDF).

If you want to export a specific report section, be sure to select it in the navigation pane BEFORE you click "Export"

Coronavirus Travel Sentiment Index Report

- Project Overview
- Topline Findings
 - Concerned Personally
 - Concerned Personally - Breakout
 - Concerned for Friends/Family
 - Concerned for Friends/Family - Brea
 - Concerned for Personal Finances
 - Concerned for Personal Finances - B
 - Concerned for National Economy
 - Concerned for National Economy - B
 - Destinations Associated with Coron
 - Travel Affected by Coronavirus
 - How Travel Was Affected by Coronav
 - How Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Why Travel Was Affected by Coronav
 - Number of Trips Cancelled/Postpone
 - Number of Trips Cancelled - Breakou
 - Number of Trips Postponed - Breakc
 - Month of Trips Cancelled
 - Month of Trips Cancelled - Breakout
 - Refunds for Cancelled Reservations
 - Rescheduled Postponed Trips
 - Month of Rescheduled Postponed Tr
 - Month of Rescheduled Postponed Tr
 - Type of Trips Cancelled Or Postpone



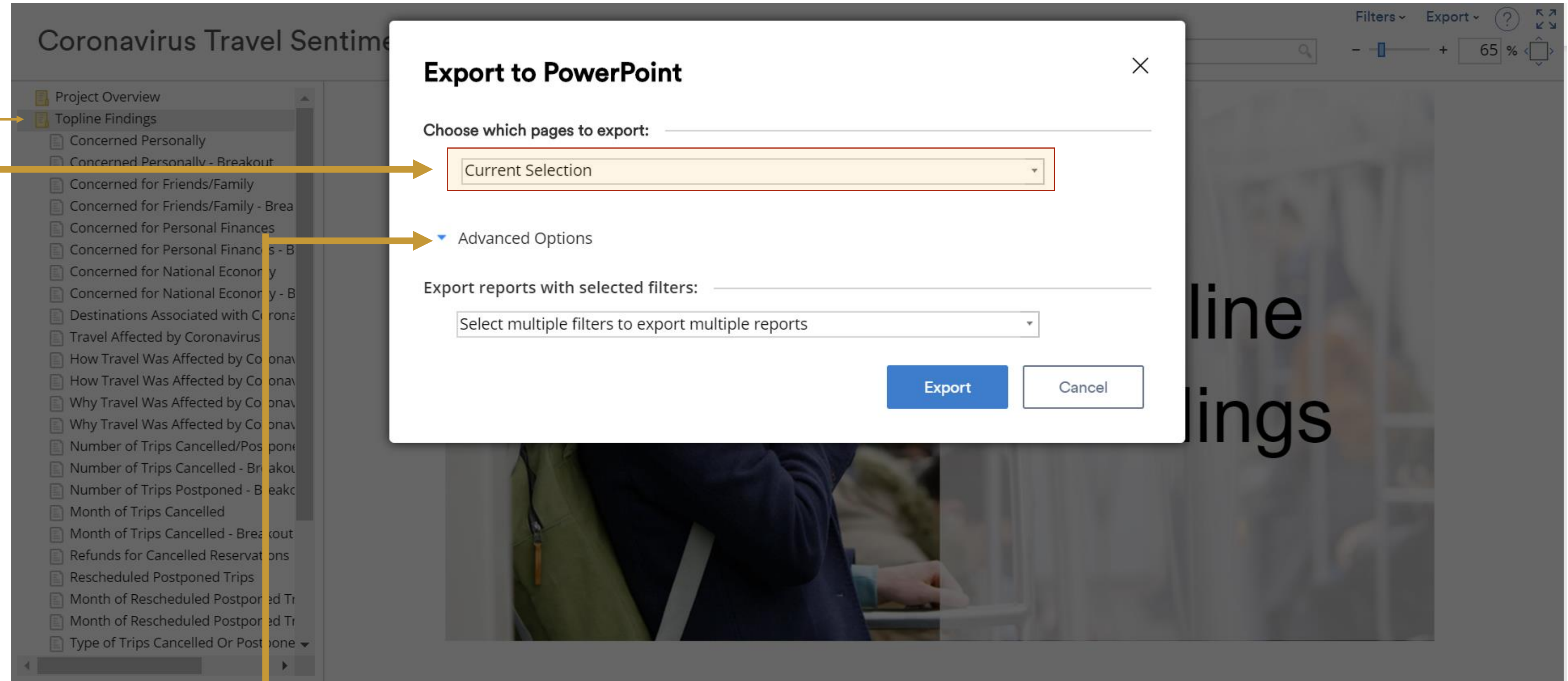
Topline Findings

EXPORTING THE DATA:

After selecting your preferred file type, Displayr will prompt you to select "Current Selection" or "All"

"Current Selection" will only export the single data point you are viewing (or an entire report section if it is selected in the navigation pane as shown in this screenshot).

"All" will allow you to download the entire report.



IMPORTANT NOTE: Use the "Advanced Options" to apply specific filters to the data you want to export.

NEED MORE HELP?

If you have any additional questions about using Displayr
please reach out to our dashboard expert:

Chingun Ganzorig

Research Manager

Chingun@DestinationAnalysts.com

(415) 722-2503



A Bright and Happy 2021!

Thank you for your partnership and friendship throughout the trying year that was 2020. We join you in optimism that 2021 will be much better!

Destination  Analysts

