# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 65

RESEARCH FINDINGS

June 7, 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 65<sup>th</sup> 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 65<sup>th</sup> wave of this survey was collected from June  $2^{nd}$  – June  $4^{th}$ , 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, 1,217 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of  $\pm$ 0.

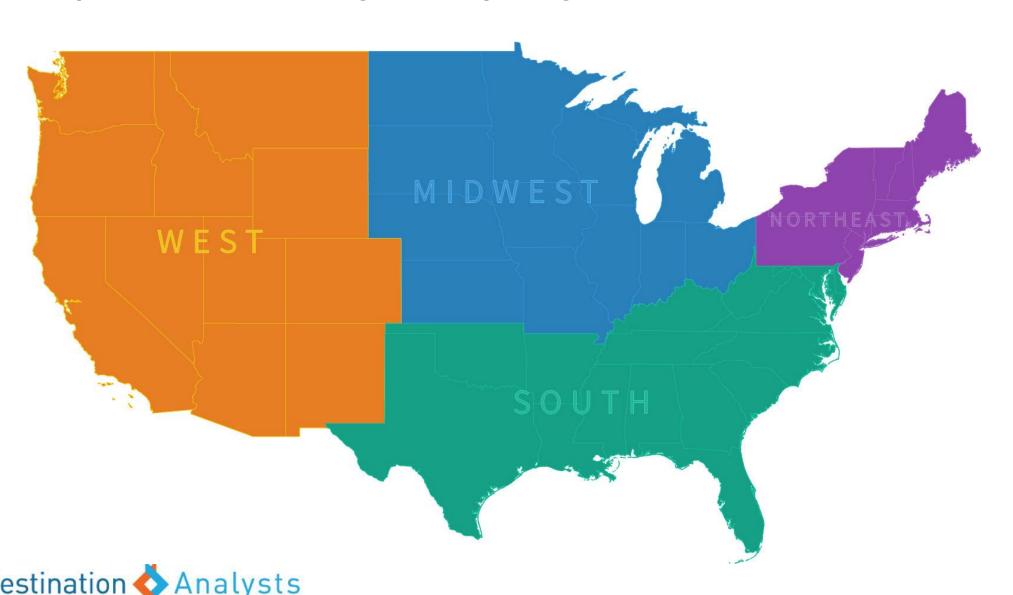
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## PROJECT OVERVIEW

**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:



# 2020

	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 1 <i>7</i> -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	Oct 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

# 2021

Wave #

	Data collection	Report releas
43	January 1-3	January 4
44	January 8-10	January 11
45	January 15-17	January 18
46	January 22-24	January 25
47	January 29-31	February 1
48	February 5-7	February 8
49	February 12-14	February 15
50	February 19-21	February 22
5 1	February 26-28	March 1
52	March 5-7	March 8
53	March 12-14	March 15
54	March 19-21	March 22
55	March 26-28	March 29
56	April 2-4	April 5
57	April 9-11	April 12
58	April 16-18	April 19
59	April 23-25	April 26
60	April 30 – May 2	May 3
61	May 6-8	May 10
62	May 13-15	May 1 <i>7</i>
63	May 20-22	May 24
64	May 26-28	May 31
65	June 2-4	June 7
66	June 9-11	June 14
67	June 16-18	June 21
68	June 23-25	June 28

# TOP TAKEAWAYS

The following are the top takeaways that emerged from Wave 65 of this weekly consumer traveler sentiment tracking study.

- Memorial Day trips increase American's comfort with traveling: Over the Memorial Day holiday, nearly a quarter (22.4%) of American travelers took a trip. Of which, 64.6% said they had a negative-leaning experience—most commonly restaurants not being fully open (19.1%), crowding (19.0%) and poor COVID-19 safety standards (17.9%). In addition, about 40% said they found other travelers they encountered on these trips to be irritating. Still though, these trips are building traveler confidence. In fact, well over half (53.6%) said their Memorial Day trip helped them feel more comfortable with being out and traveling again.
- Cruising appears to be on the rebound: With decreasing concerns around COVID and Americans' confidence in travel's safety continuing to grow, this week the percent of travel bookers who made cruise reservations for an upcoming trip more than doubled in the last week (from 7.0% to 16.1%). In addition, perceptions of traveling by cruise line being unsafe has hit a pandemic-era low (46.0%—down from 60.4% at the beginning of April).



# TOP TAKEAWAYS

- Vaccines for children are on the rise: More American parents than ever during the pandemic now say they will have their children vaccinated against COVID (59.7% up from 44.5% last week). However, expectations for adult American travelers has stalled. This week 72.9% say they will or have been vaccinated, a figure that has been stagnant over the last 5 weeks and has yet to surpass the 75% mark.
- A pandemic record breaking 8-in-10 Americans now say they are ready to travel: This growing readiness is certainly fueled by feelings that the worst of the virus is behind us. In fact, another record breaking 67.8% expect the coronavirus situation in the U.S. will get better in the next month. Meanwhile, a historic low 6.7% expect things to get worse.
- The demand for summer travel continues its positive trend: With increasingly more Americans in a travel ready state-of-mind, the outlook for summer leisure travel continues to be healthy. The expected number of leisure trips in the next 3 months grew this week to 3.0 trips on average. While small towns and rural destinations are the likeliest types of destinations that travelers will visit, as has been seen over the past month, urban destinations are returning, with approximately 40% saying they anticipate visiting a city in the next 3 months. Average leisure trip spending during this time period is anticipated to be \$1,810, higher than \$1,691 reported last week.



# TOP TAKEAWAYS

- More Americans than ever during the pandemic recall seeing travel-related advertising: In total, 45.5% reported seeing advertisements for travel destinations in the past month. Broadcast television (42.7%) and online advertisements (41.5%) were the top mediums in which Americans recall travel ads, while ads for hotels (44.1%) and theme parks (42.2%) were the types of ads most widely recalled. Travel ads are also bringing joy to Americans as well as influencing destination decisions. When asked to consider the most recent travel ad they saw, over half said these ads made them feel happy (53.3%). Importantly though, a third of American travelers say that they have indeed decided to visit a destination as a result of having seen an advertisement (32.2%).
- American travelers want ads that are honest, friendly and fun: Websites found via search engine, broadcast television, Facebook, streaming video, print magazines and email campaigns are the best ways to reach Americans with travel messaging. Younger travelers in particular (Millennials or younger and Gen X) are especially likely to turn to Facebook to learn about new destinations to visit. The most appealing tones in travel messaging right now are ones that are honest, friendly and fun. A significant rise compared to one year ago, the desire for a fun/entertaining tone in travel ads has increased 30 percentage points, from 21.7% to now 47.1%.

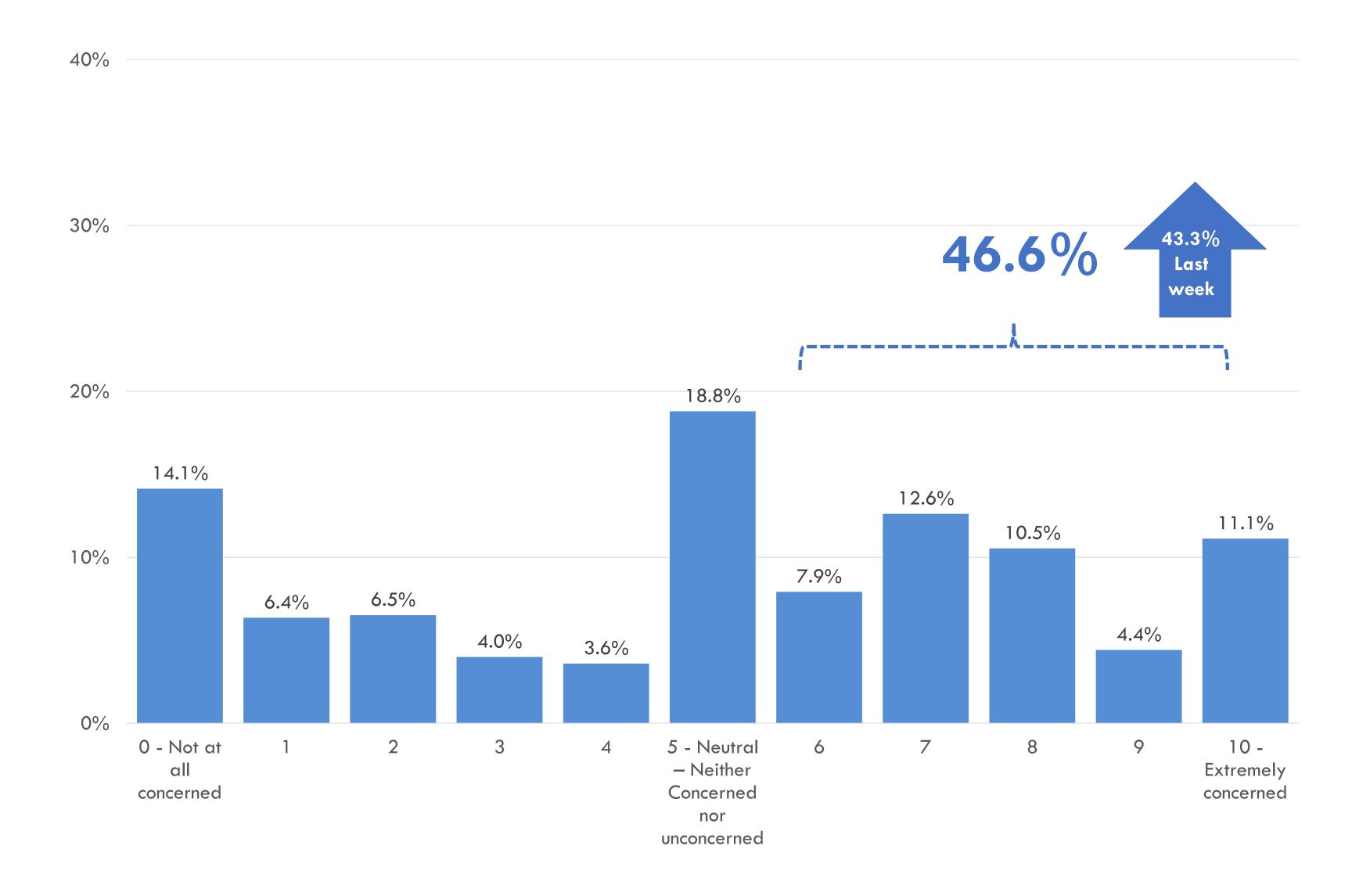




# PERSONAL HEALTH CONCERNS

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

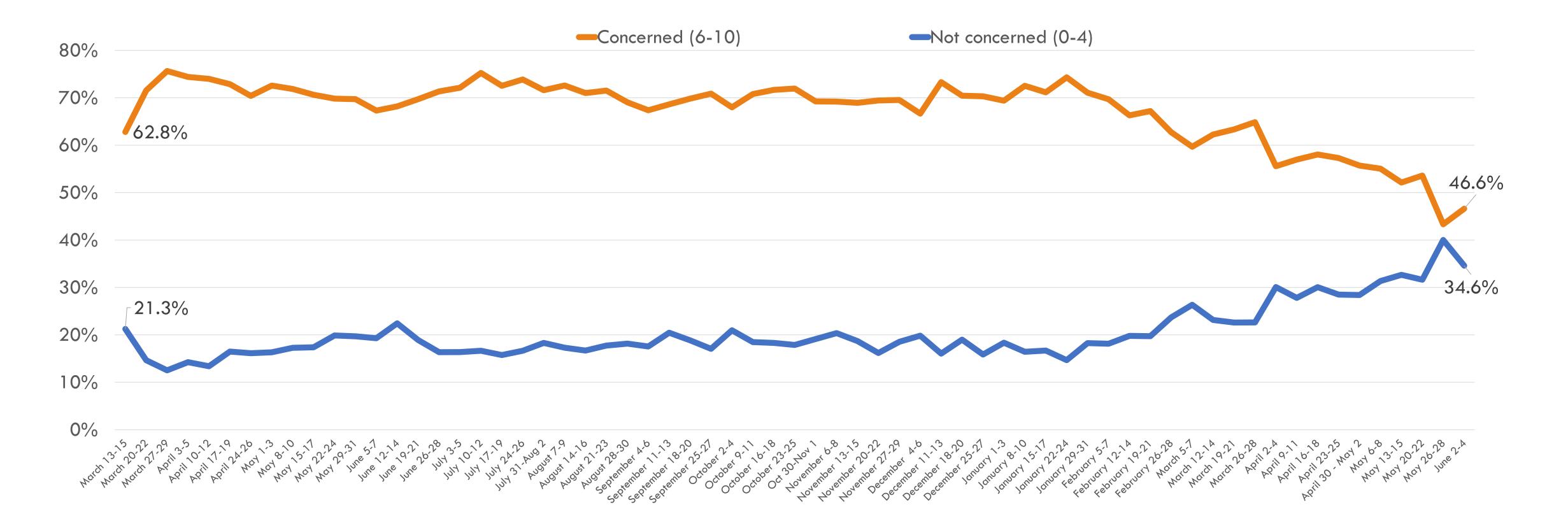
(Base: Wave 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)





# PERSONAL HEALTH CONCERNS (WAVES 1-65)

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



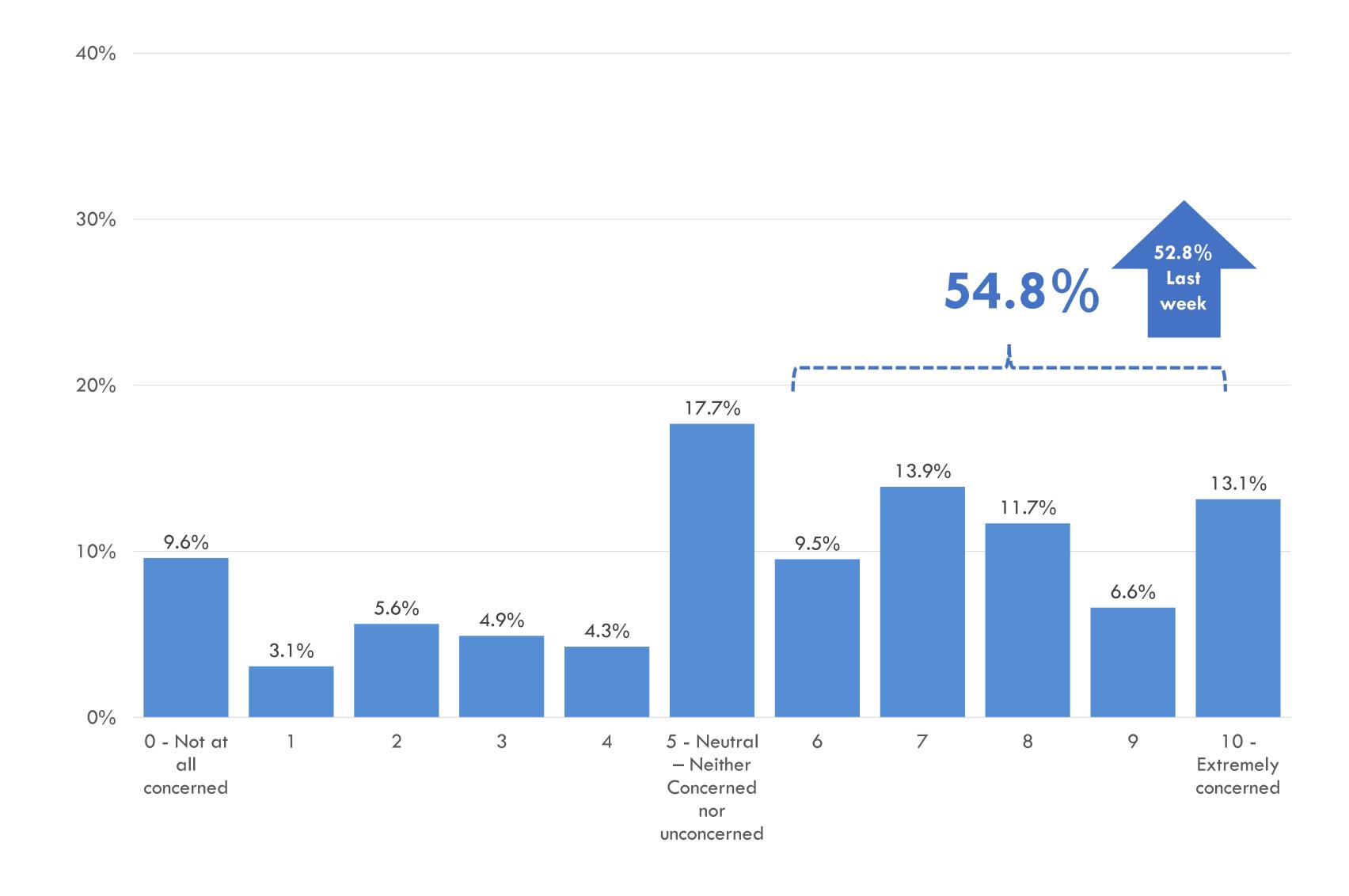
(Base: Waves 1-65. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,205, 1,205, 1,205, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,205, 1,206, 1,206, 1,207, 1,206, 1,205, 1,206, 1,205, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,208, 1,207, 1,208, 1,207, 1,208, 1



# 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)

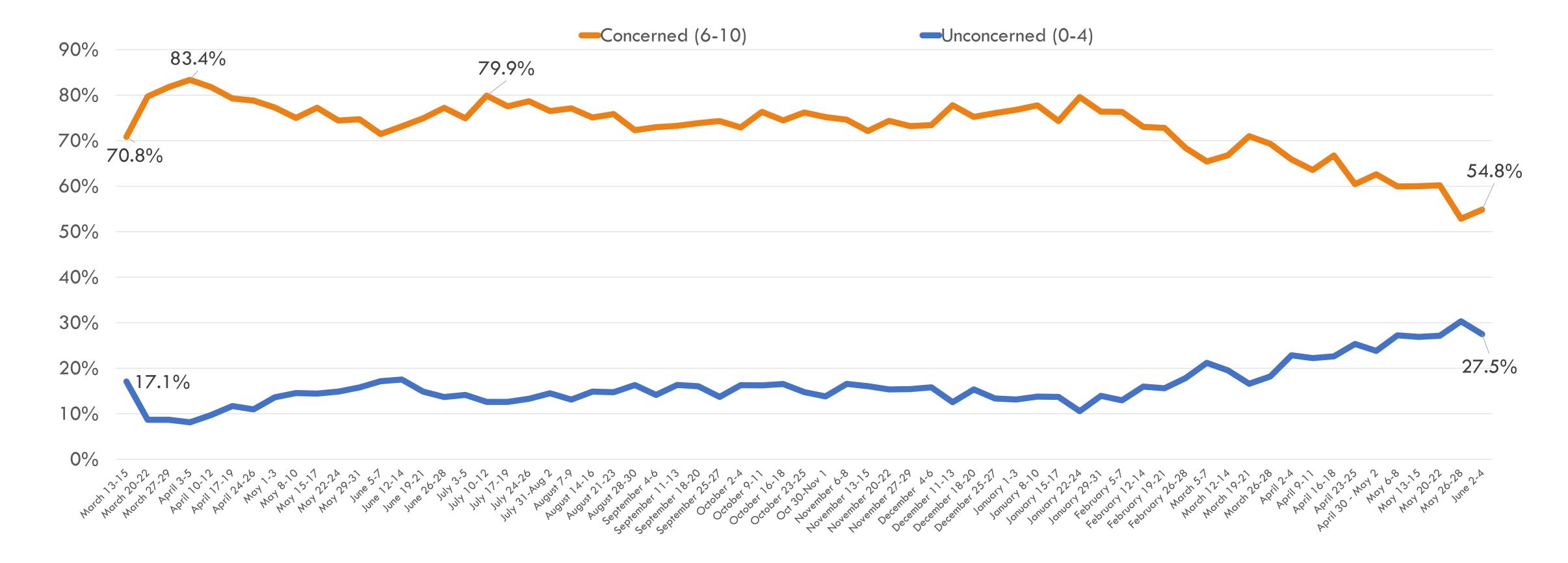
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# HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-65)

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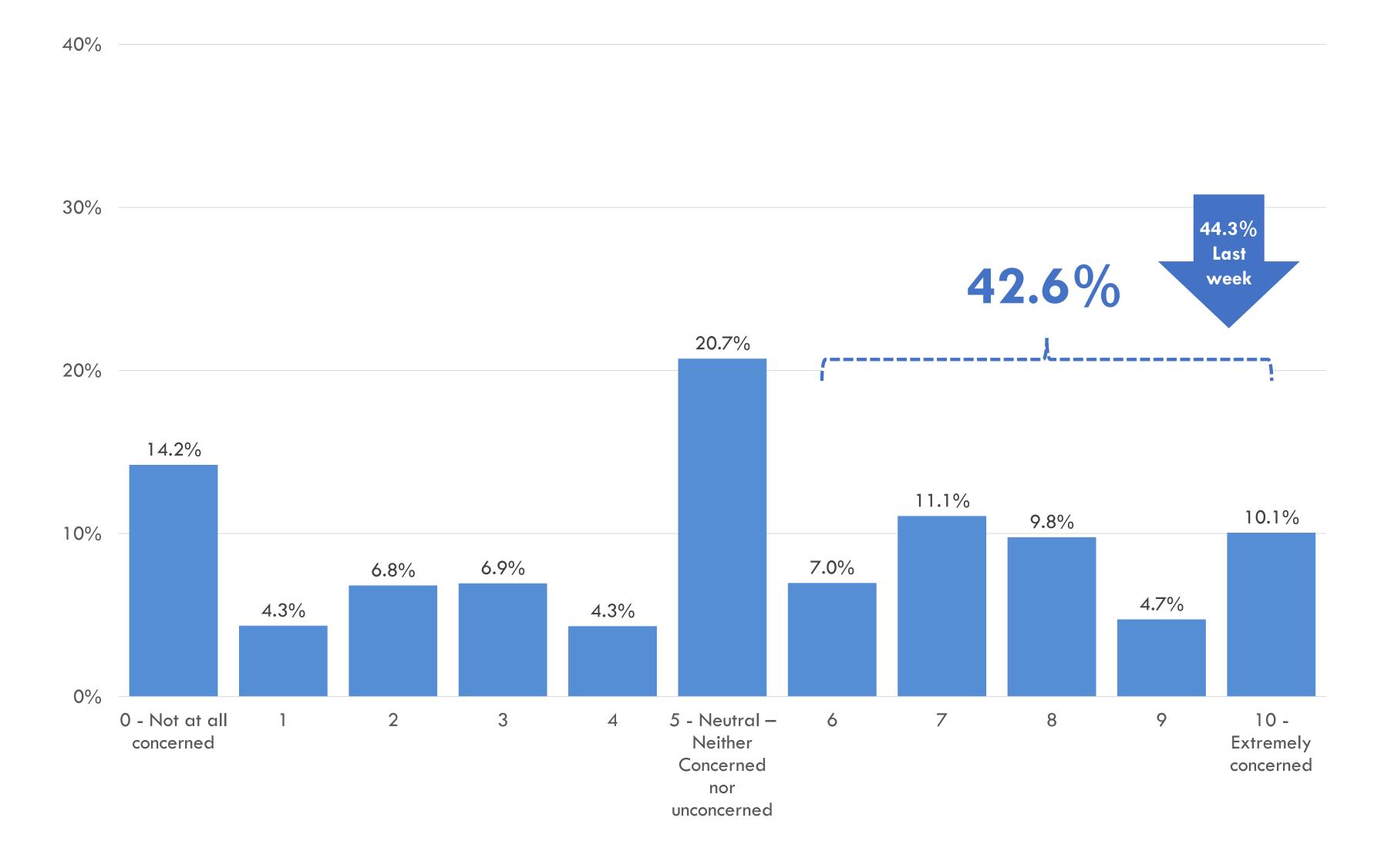
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# CONCERNS ABOUT PERSONAL FINANCES

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)

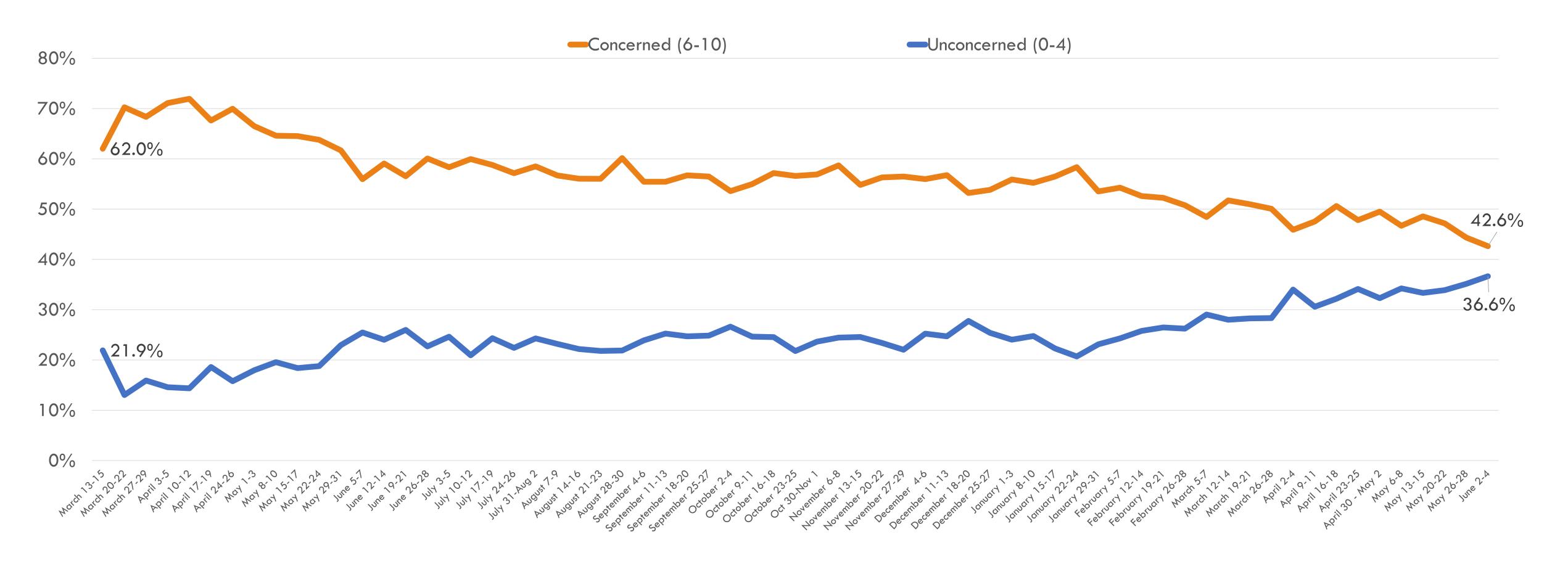
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# CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-65)

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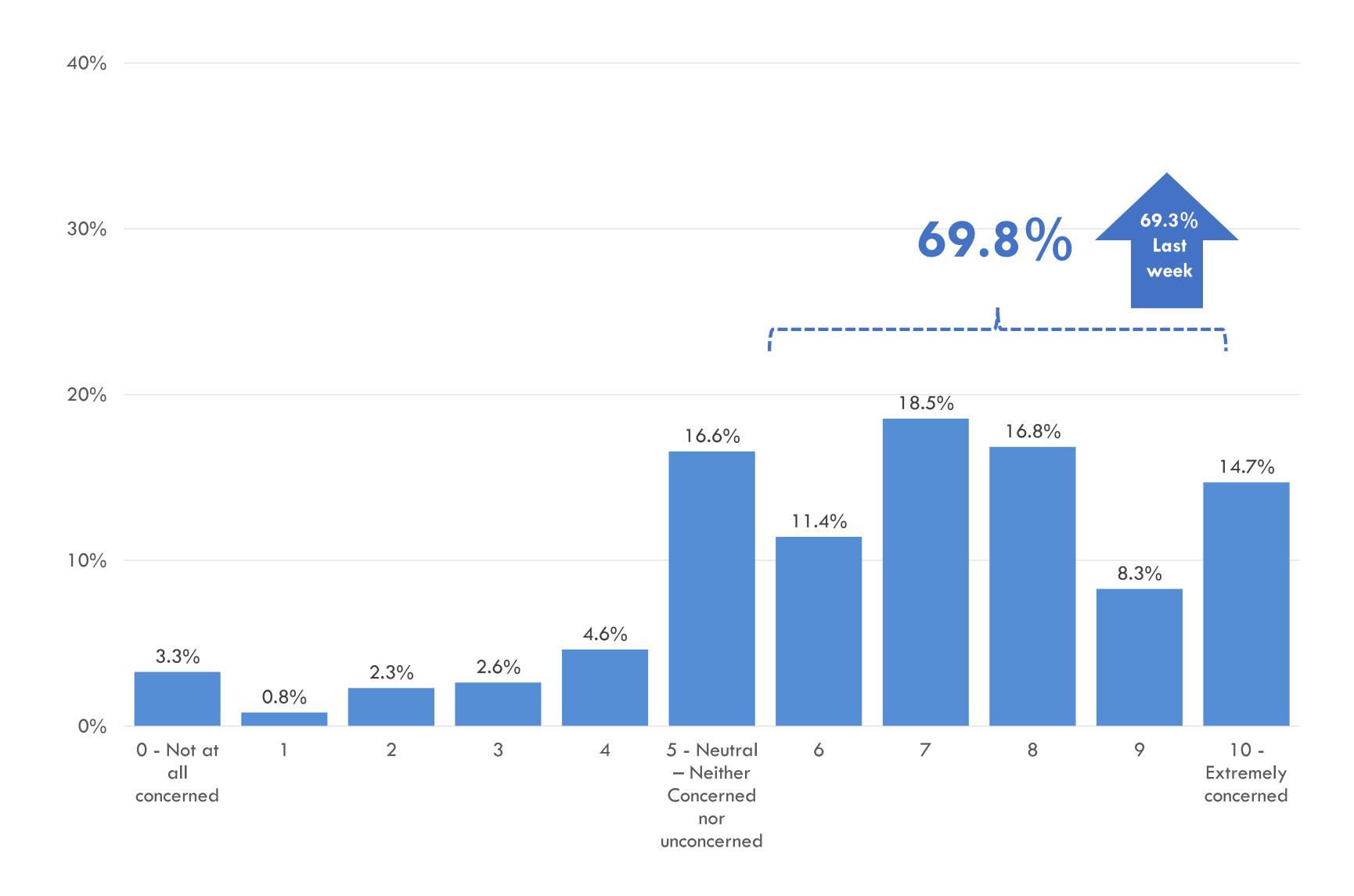
(Base: Waves 1-65. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,205, 1,205, 1,205, 1,205, 1,205, 1,206, 1,205, 1,206, 1,207, 1,206, 1,205, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,208, 1,207, 1,208, 1,207, 1,208, 1,207, 1,208, 1,207, 1,208, 1,207, 1,208, 1



# 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?

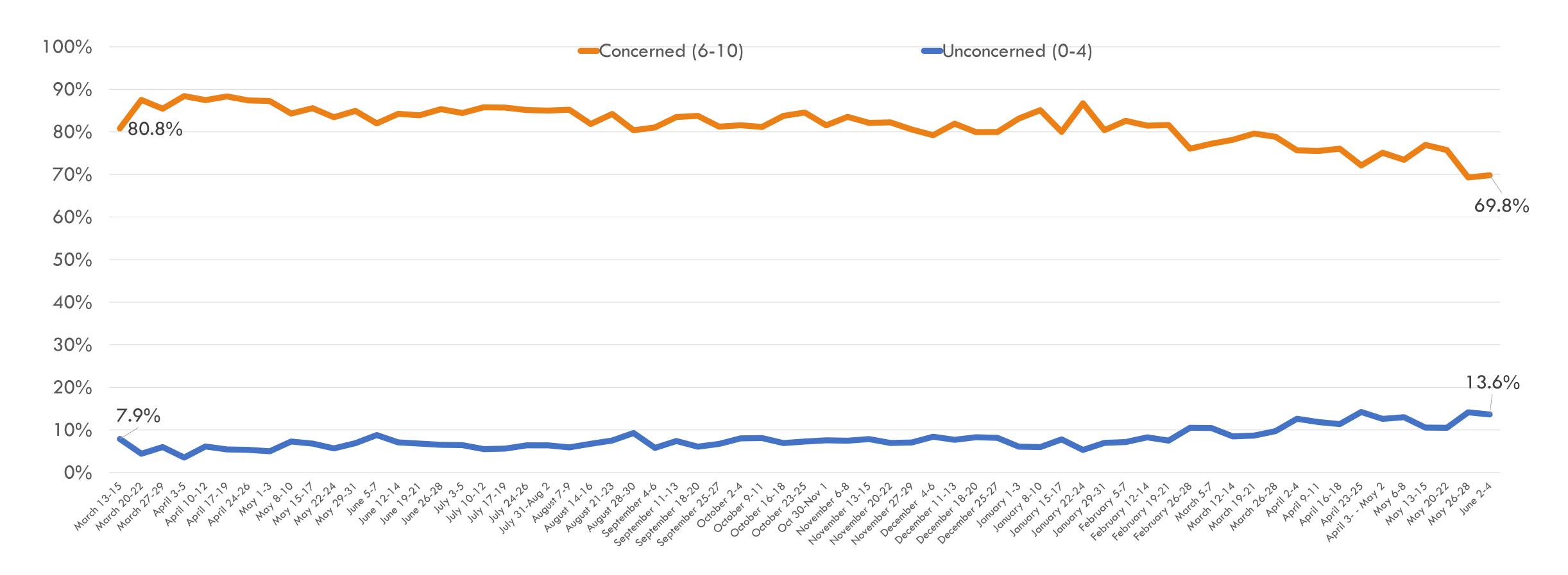
(Base: Wave 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)





# CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-65)

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



(Base: Waves 1-65. 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, 1,205, 1,205, 1,205, 1,205, 1,205, 1,206, 1,205, 1,206, 1,207, 1,206, 1,205, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,206, 1,207, 1,208, 1,207, 1,208, 1

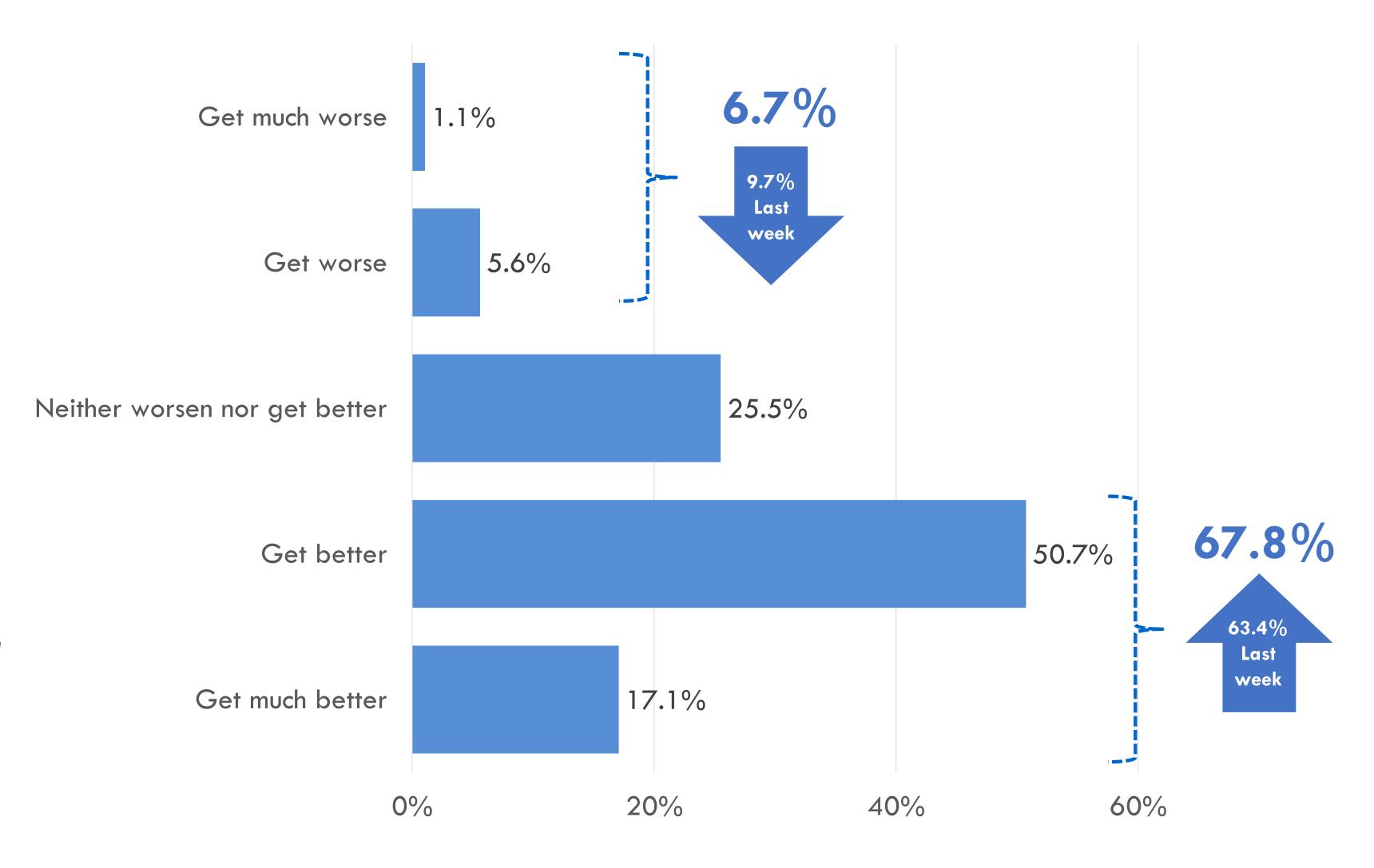


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)



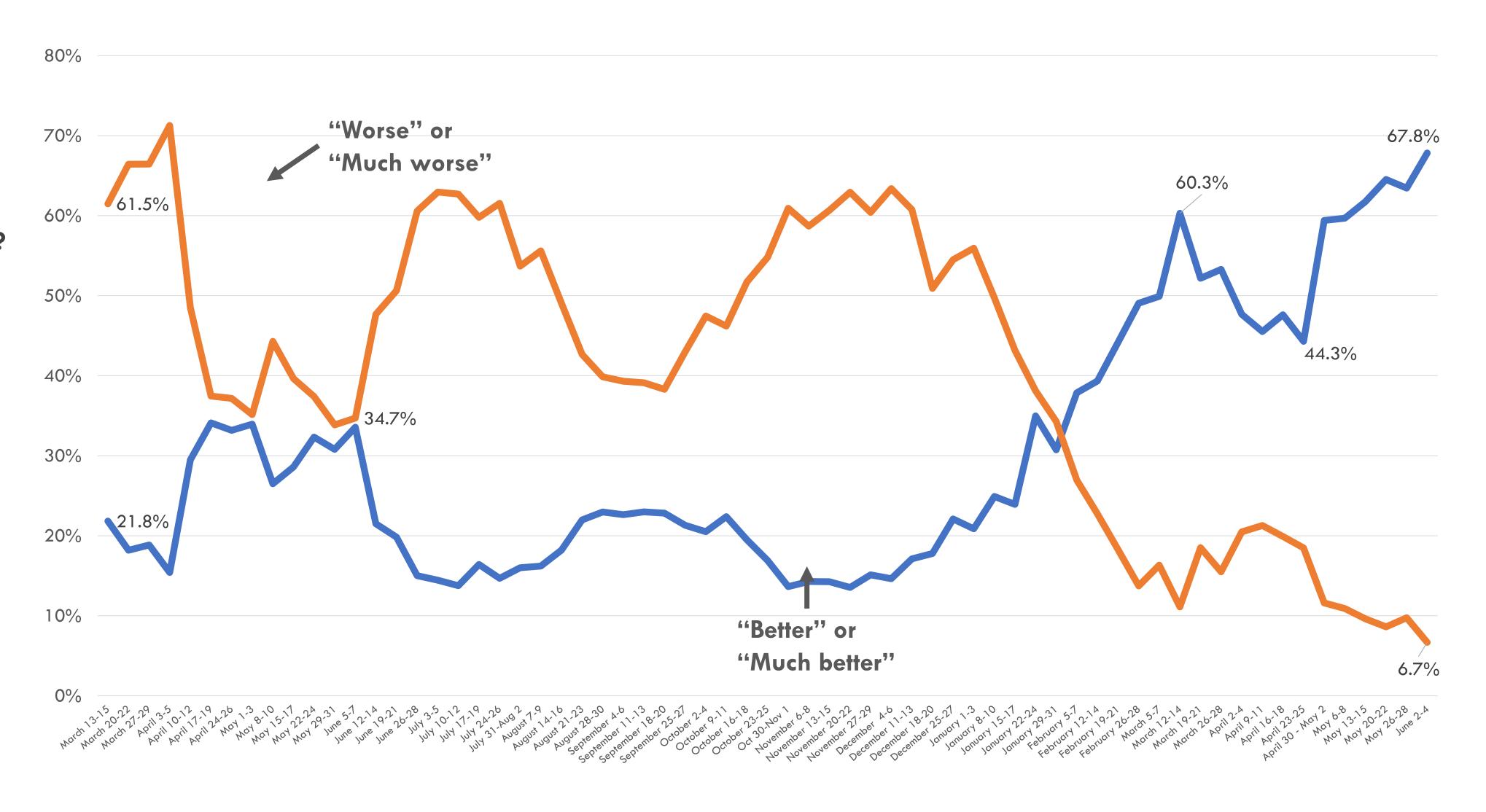


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-65)

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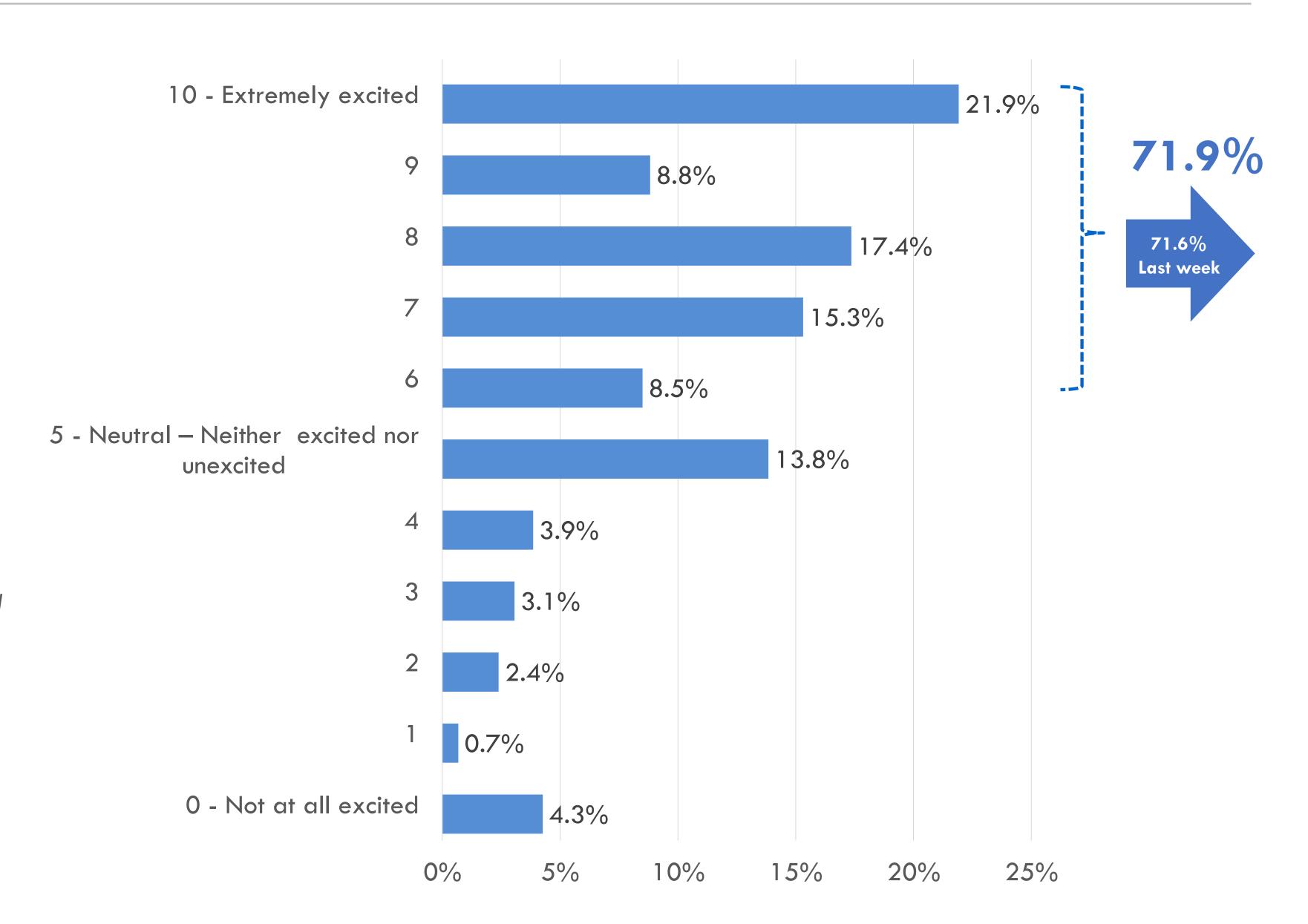


# EXCITEMENT TO TRAVEL NOW

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 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)



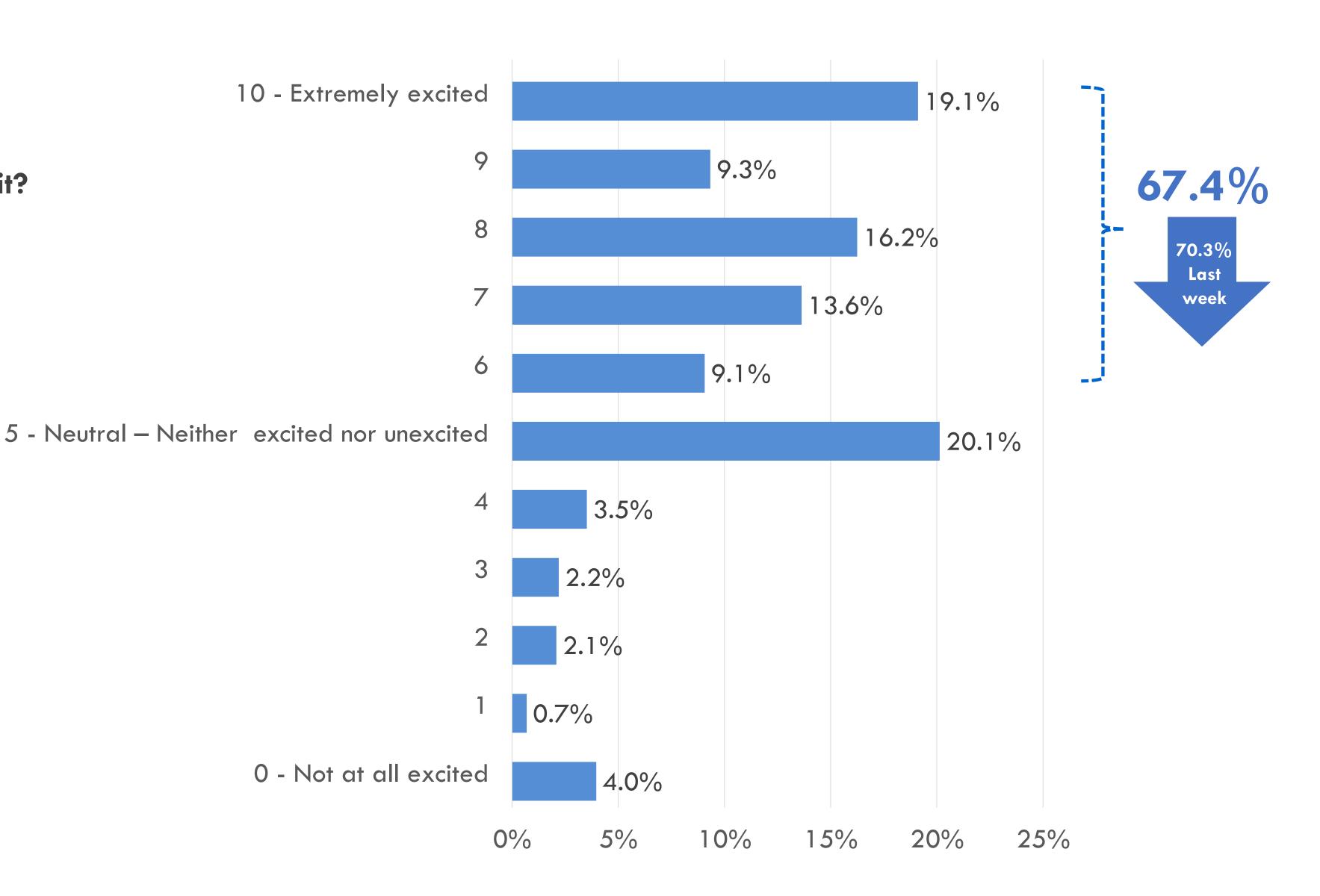


# OPENNESS TO TRAVEL INSPIRATION

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

(Base: Wave 65 data. All respondents, 1,217 completed

surveys. Data collected June 2-4, 2021)



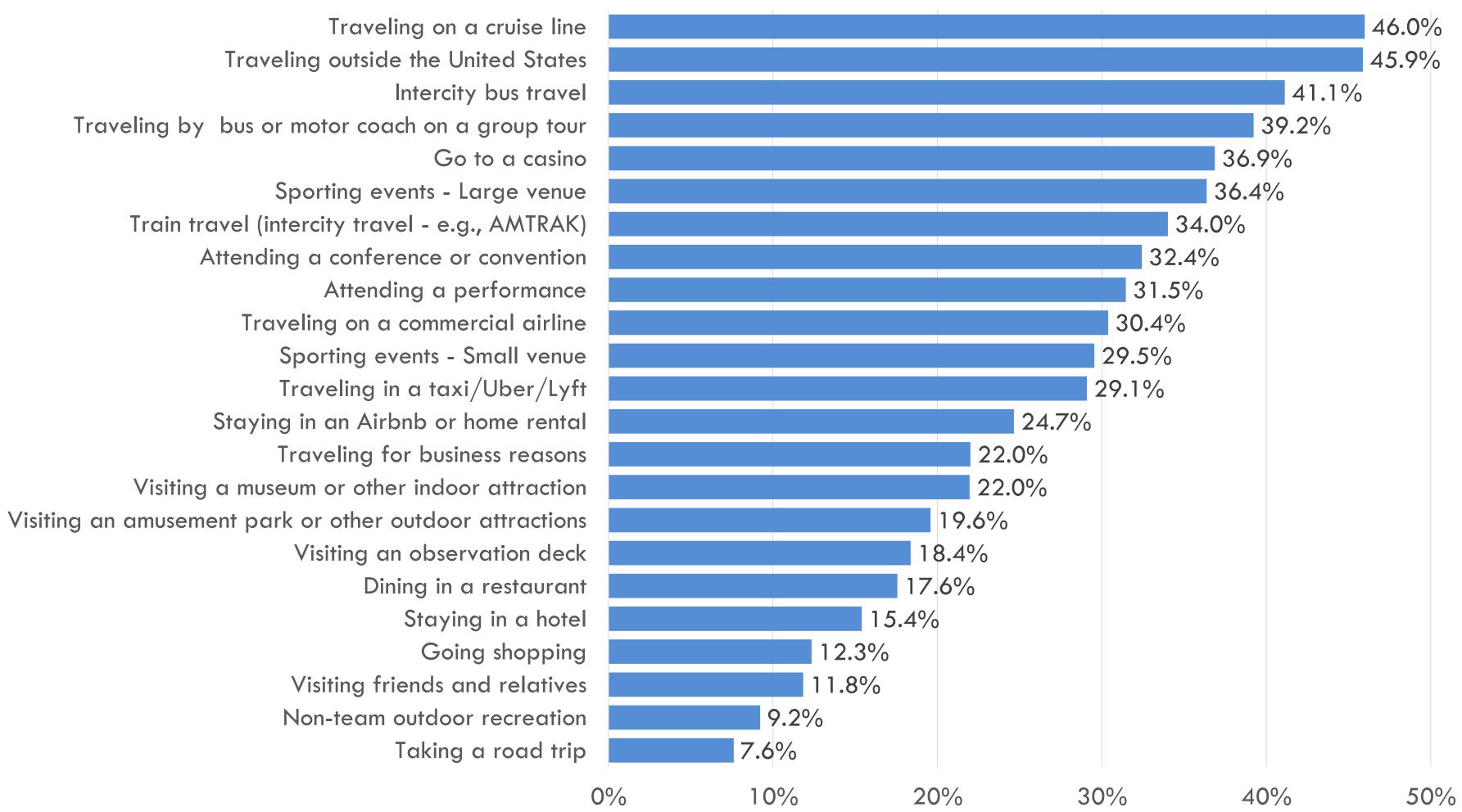


# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 65)

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

(Base: Wave 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)





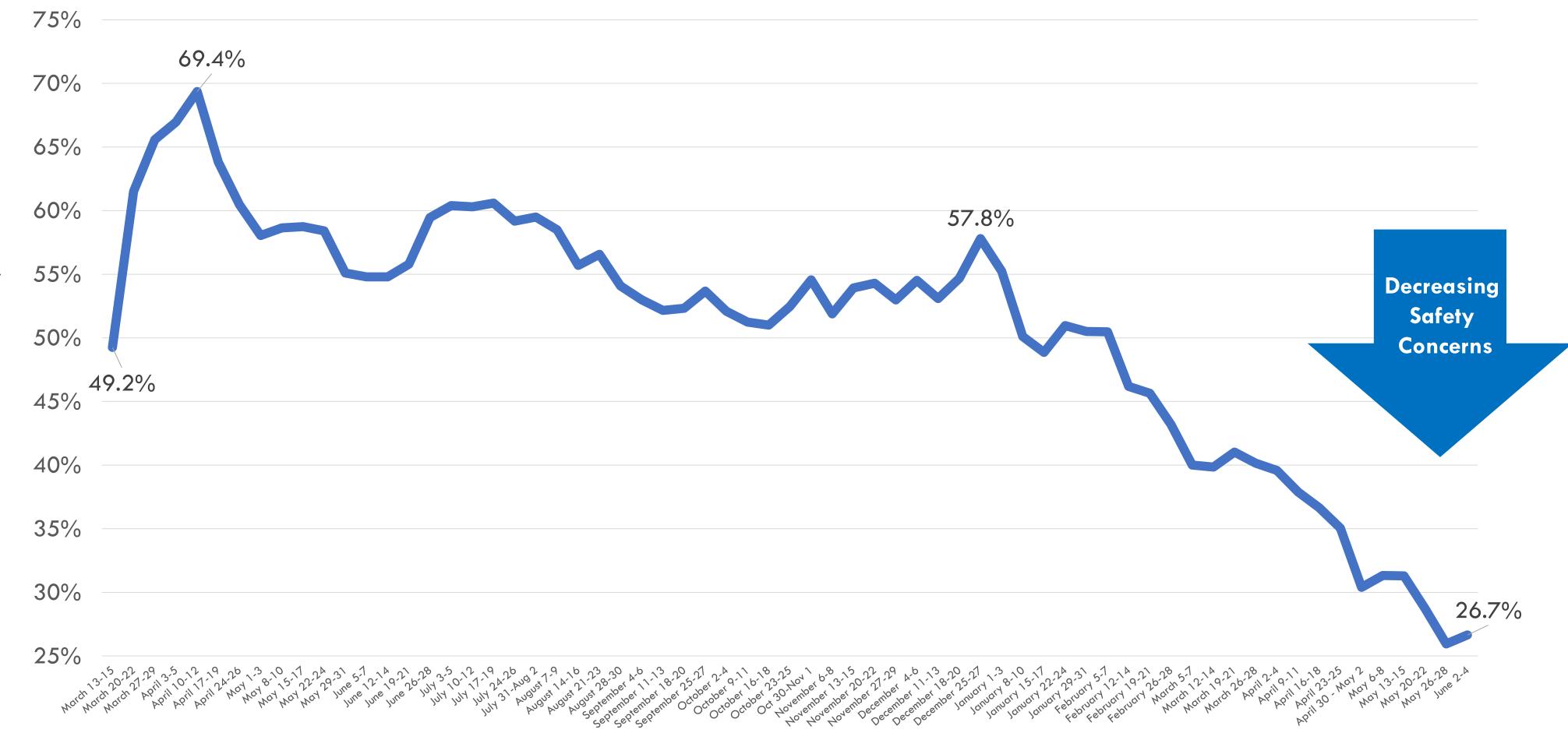


# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-65 COMPARISON)

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



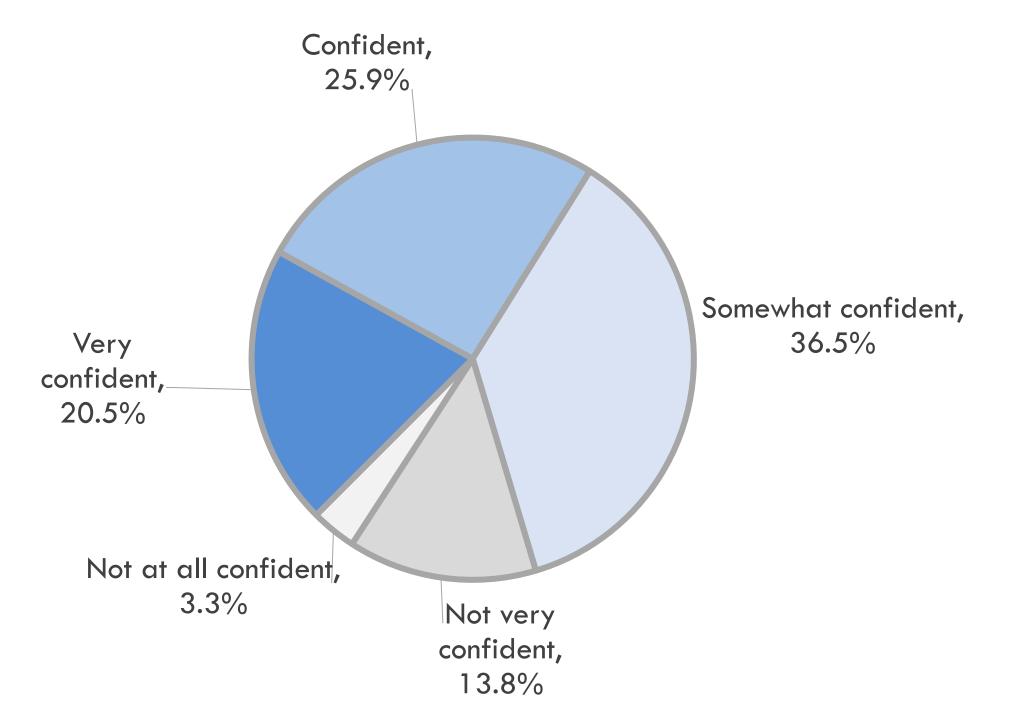






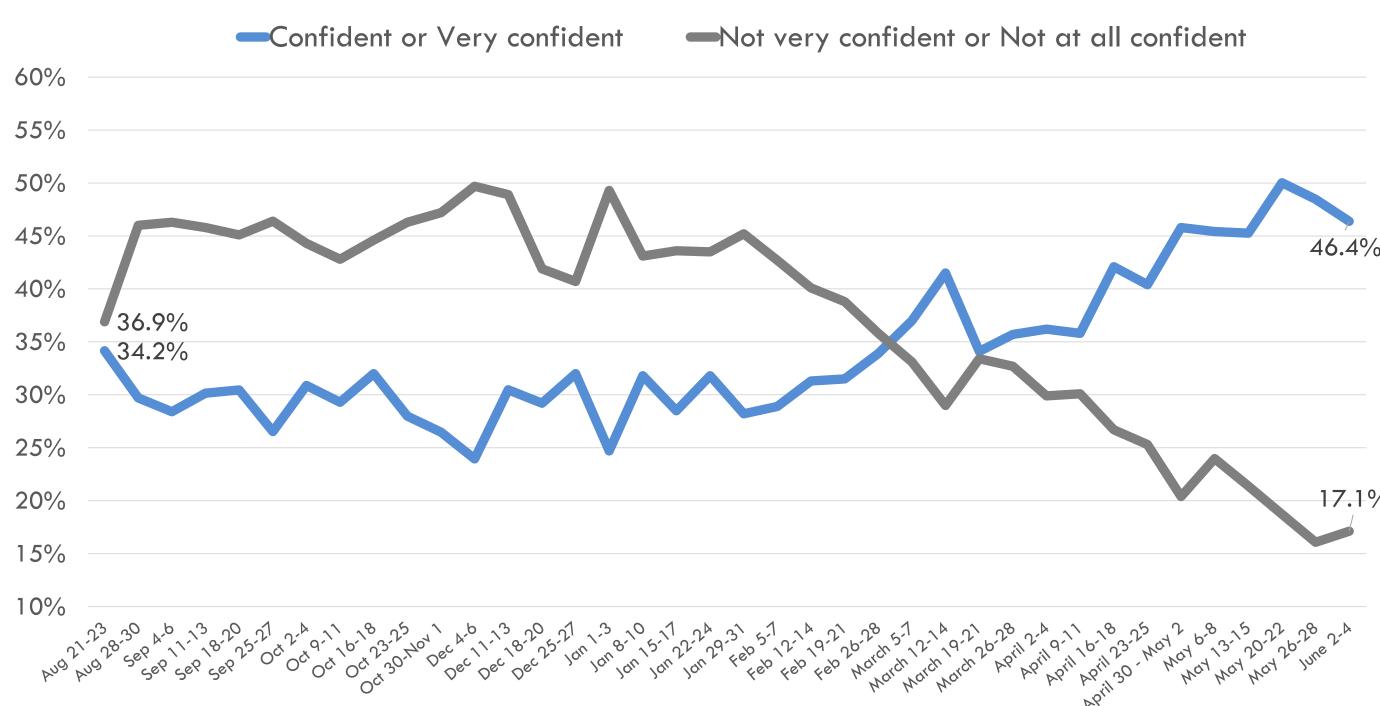
# CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



(Base: Wave 24-34 and 39-65 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 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, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

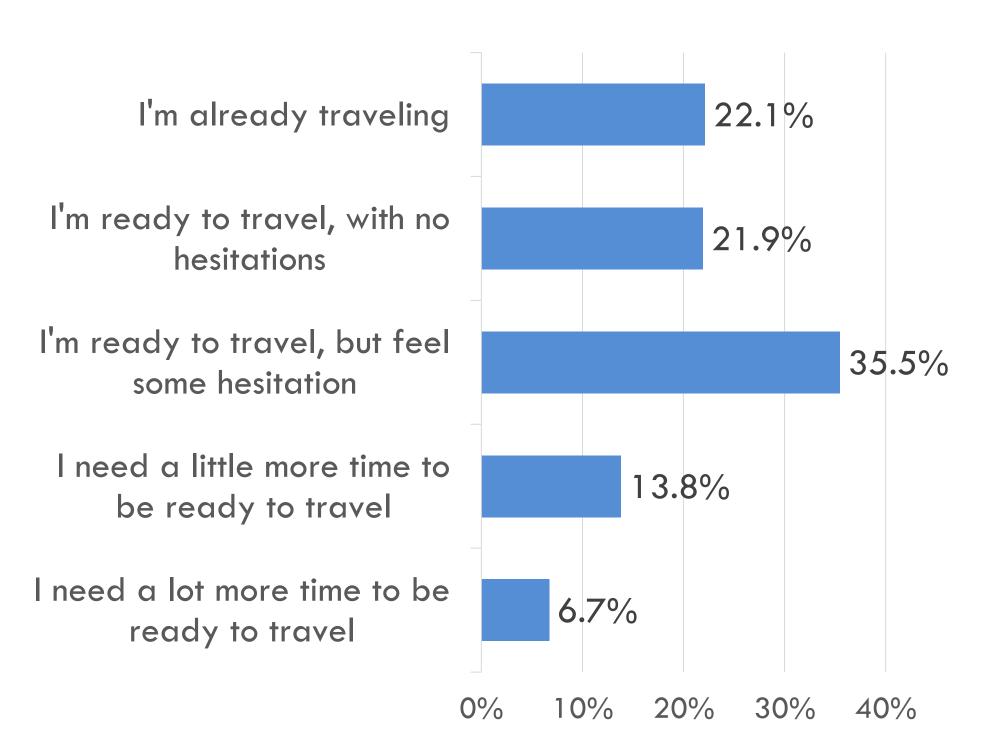
#### Historical data



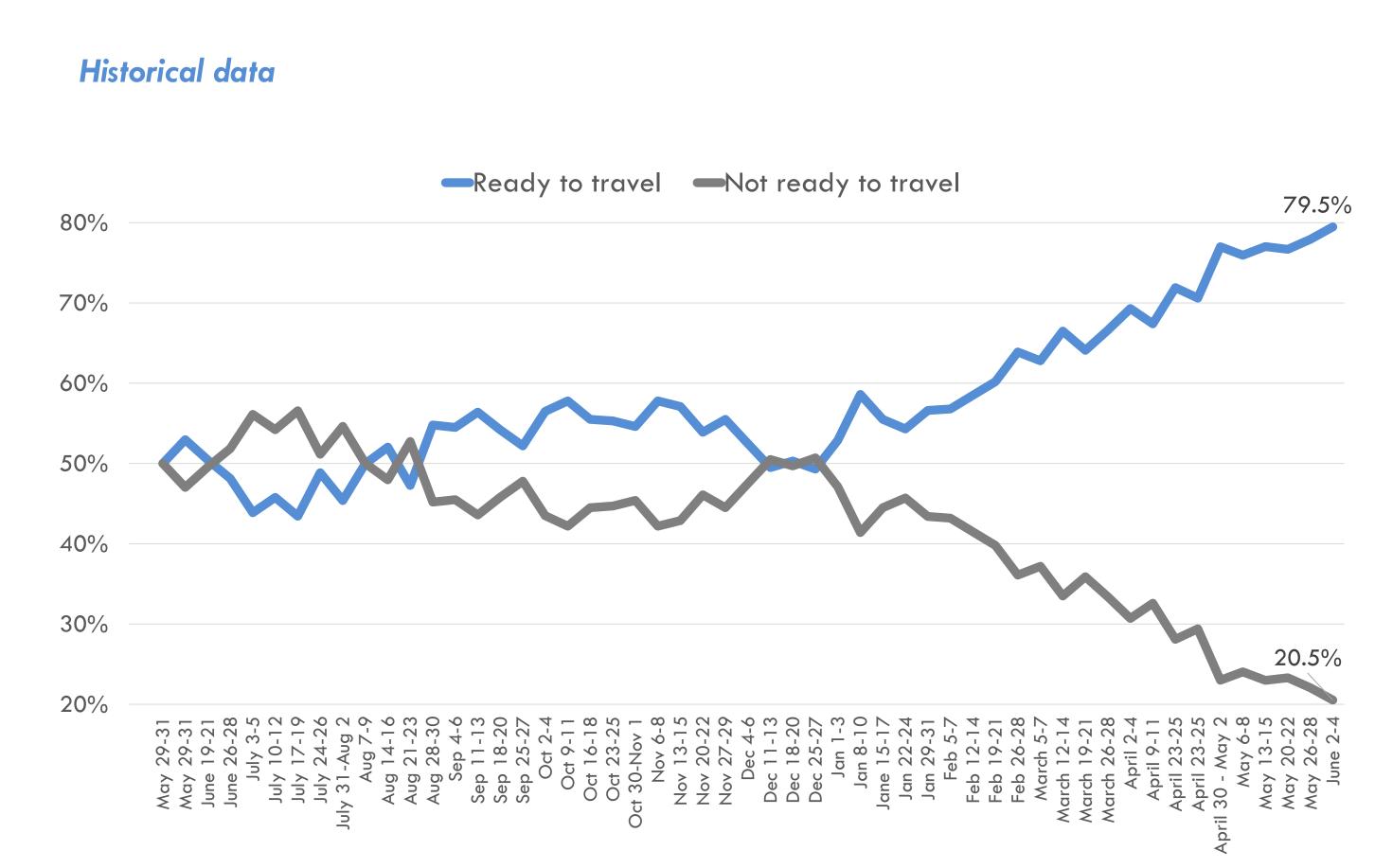


# TRAVEL STATE-OF-MIND

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



(Base: Waves 12-13 and 15-65. 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, 1,206, 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, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

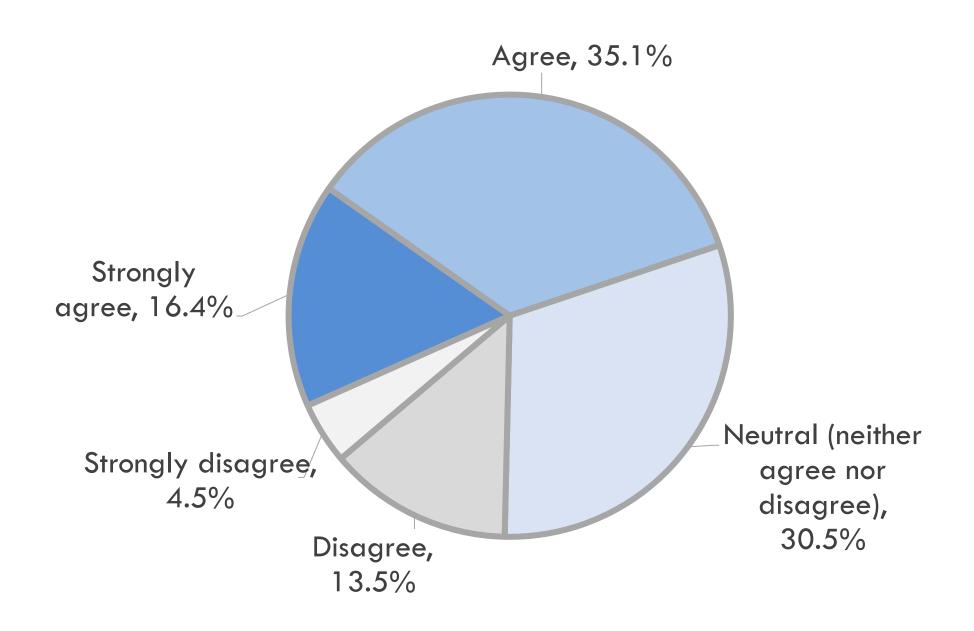


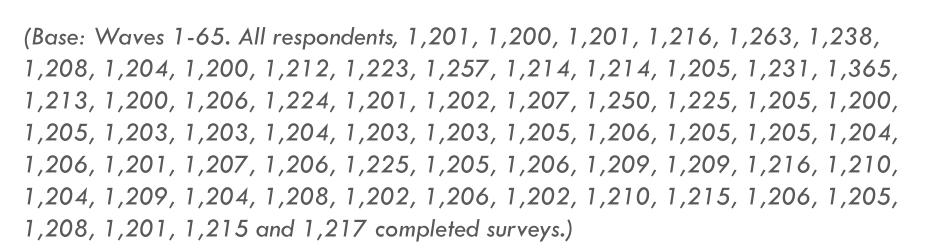


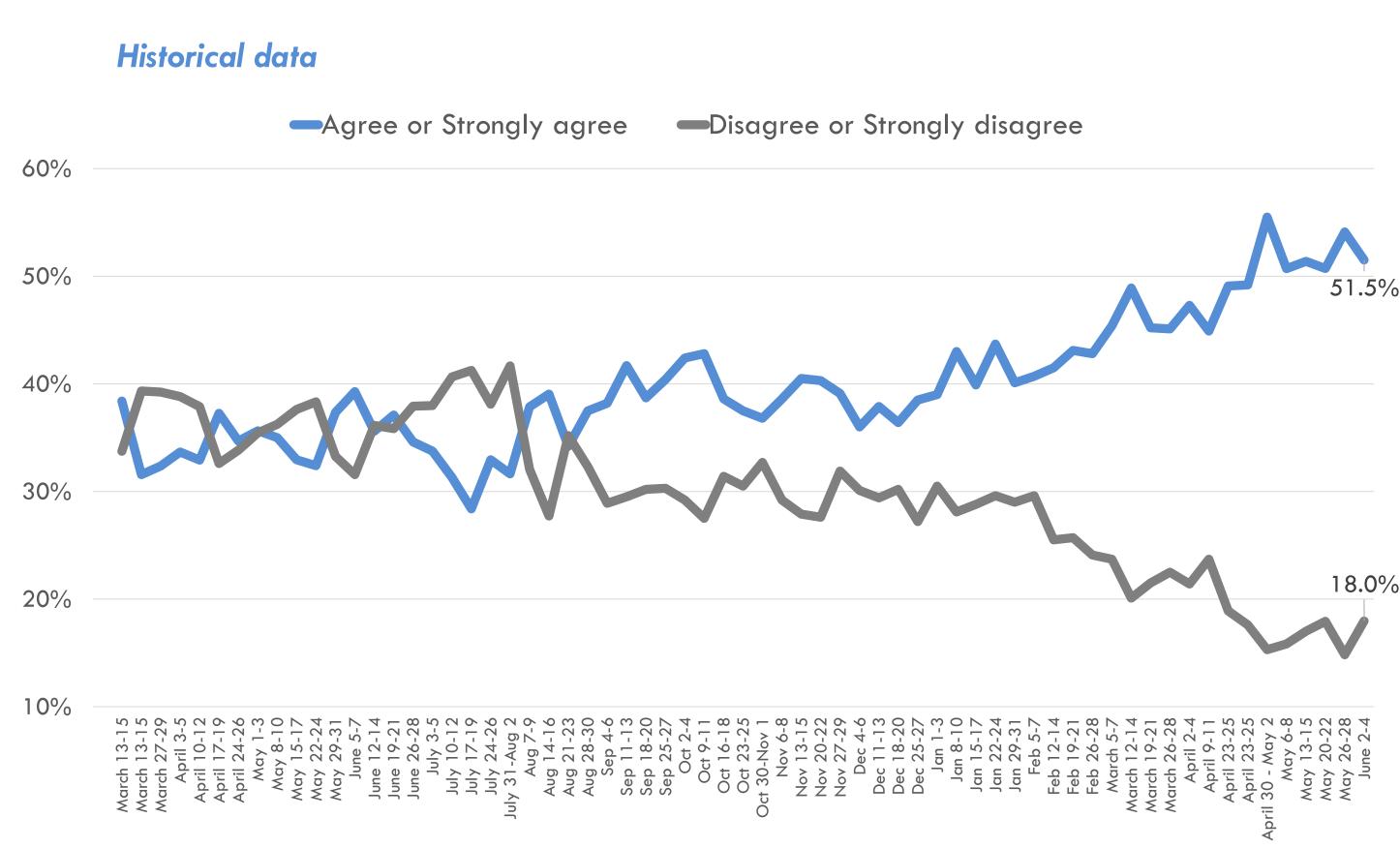
# DISCOUNTS AND PRICE CUTS

#### 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.





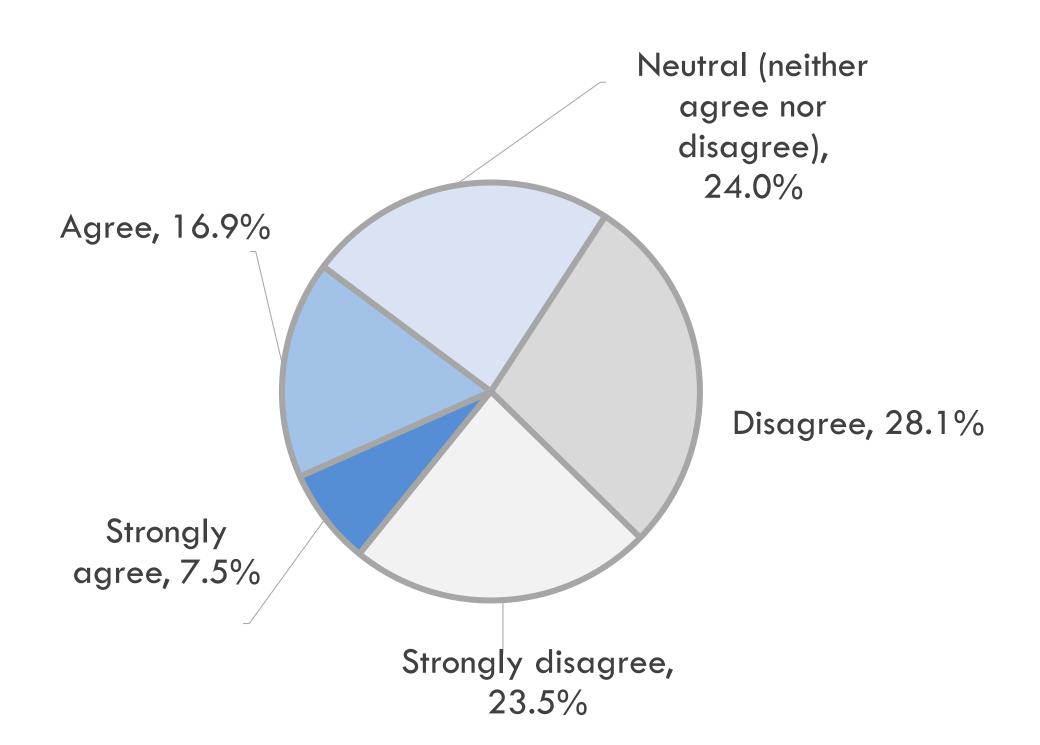




# TRAVEL GUILT

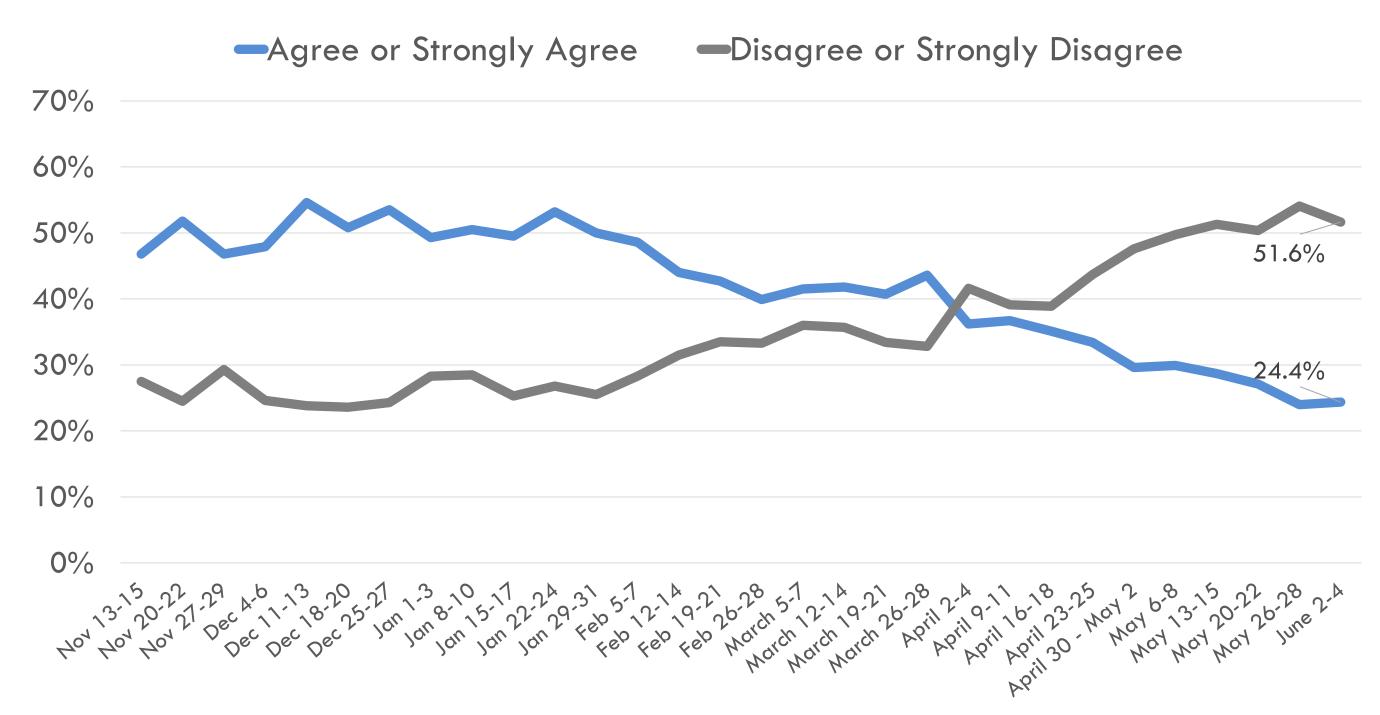
#### How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



(Base: Waves 36-65 data. All respondents, 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, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

#### Historical data

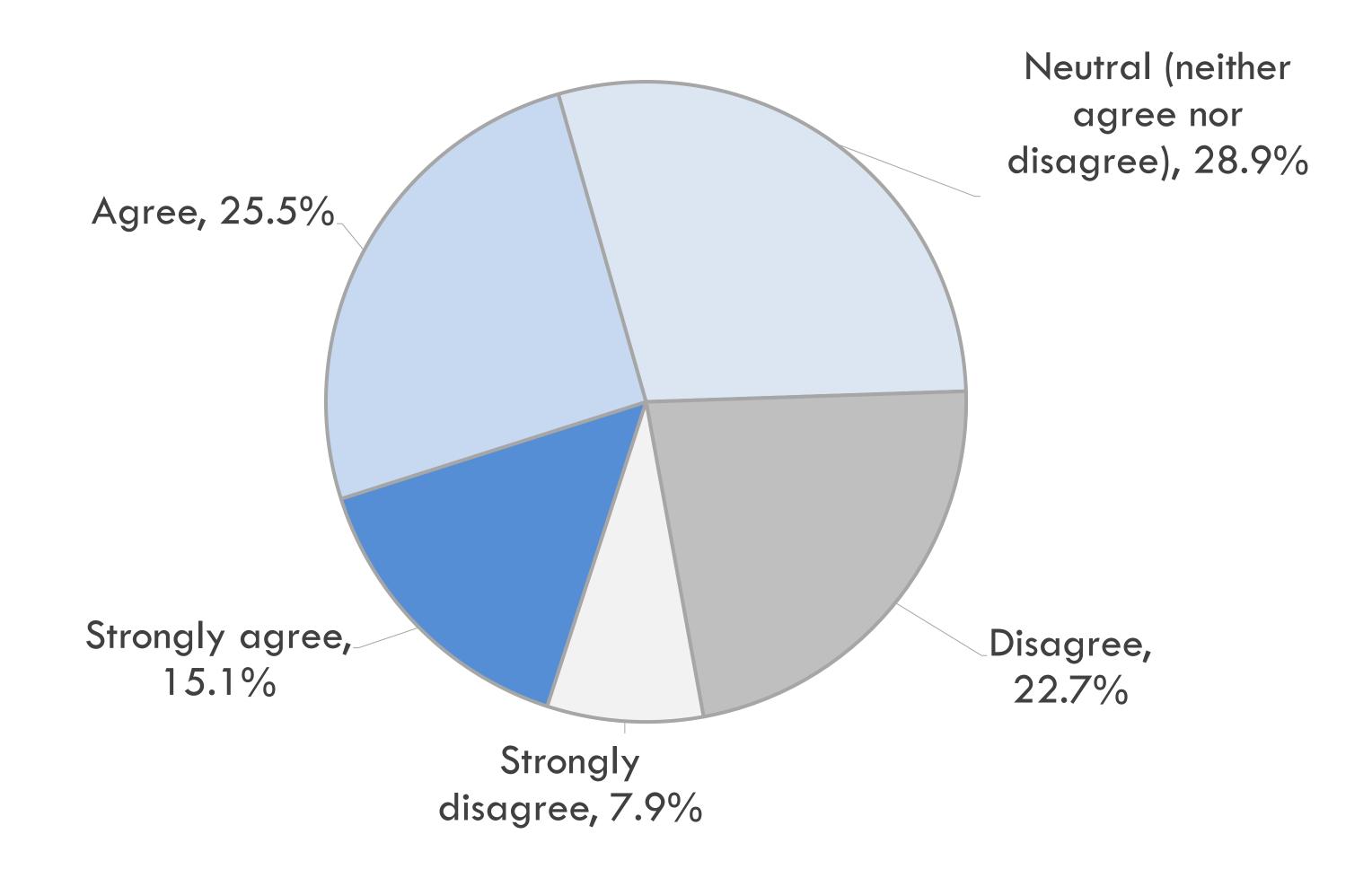




# PANDEMIC IS OVER AND READY TO MOVE FORWARD

Question: In my heart, I feel like the COVID-19 pandemic is effectively over. I'm ready to move forward.

(Base: Wave 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)



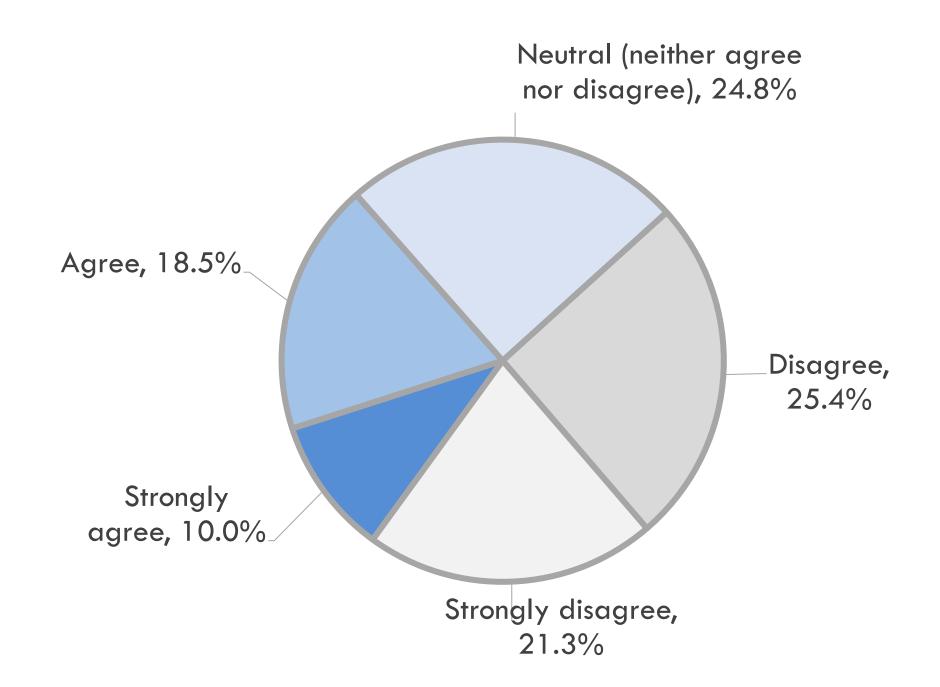




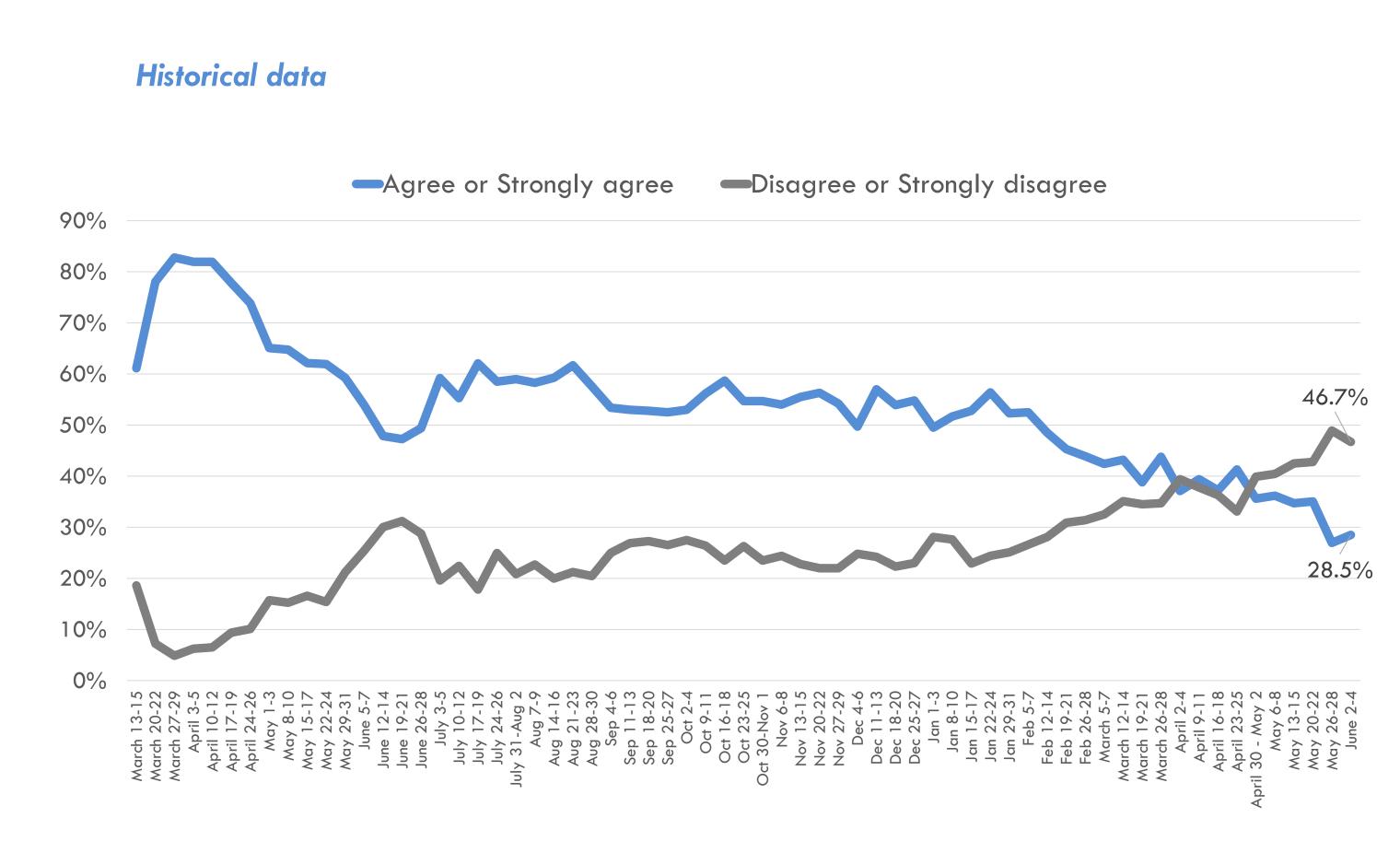
# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

#### 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 1-65. 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, 1,206, 1,207, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

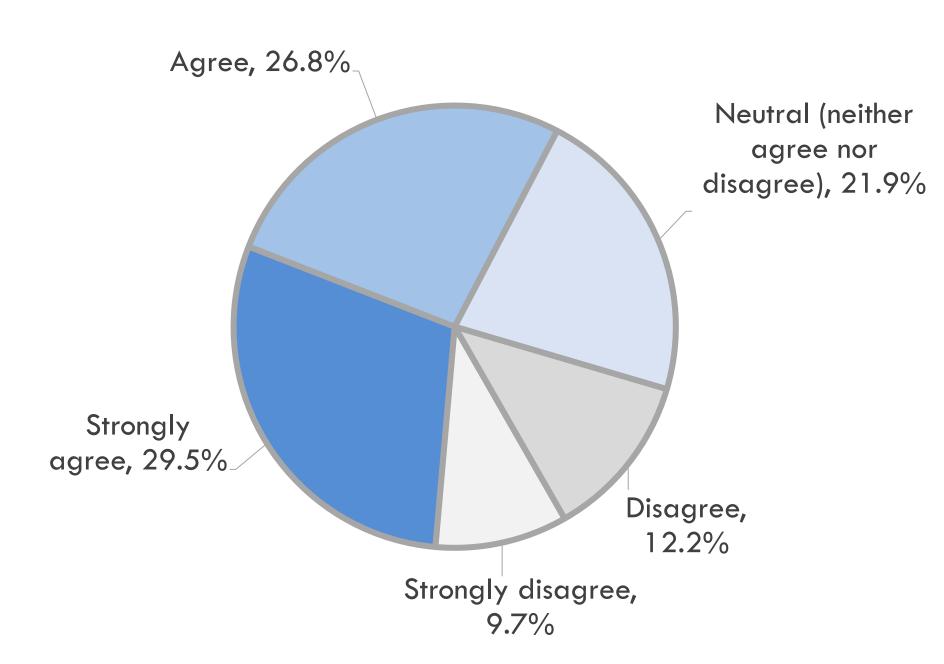




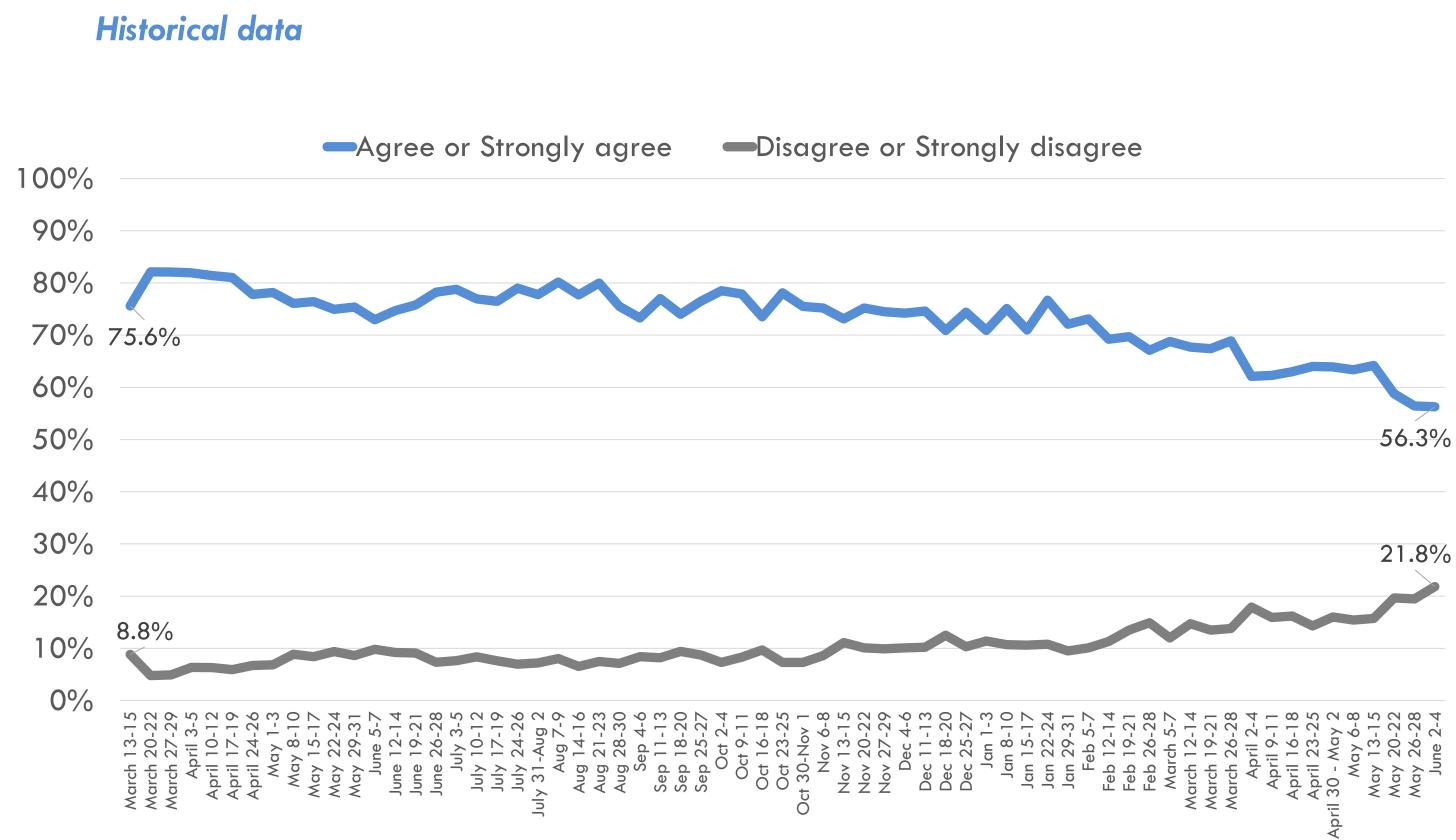
# AVOIDING INTERNATIONAL TRAVEL

#### 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 1-65. 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, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

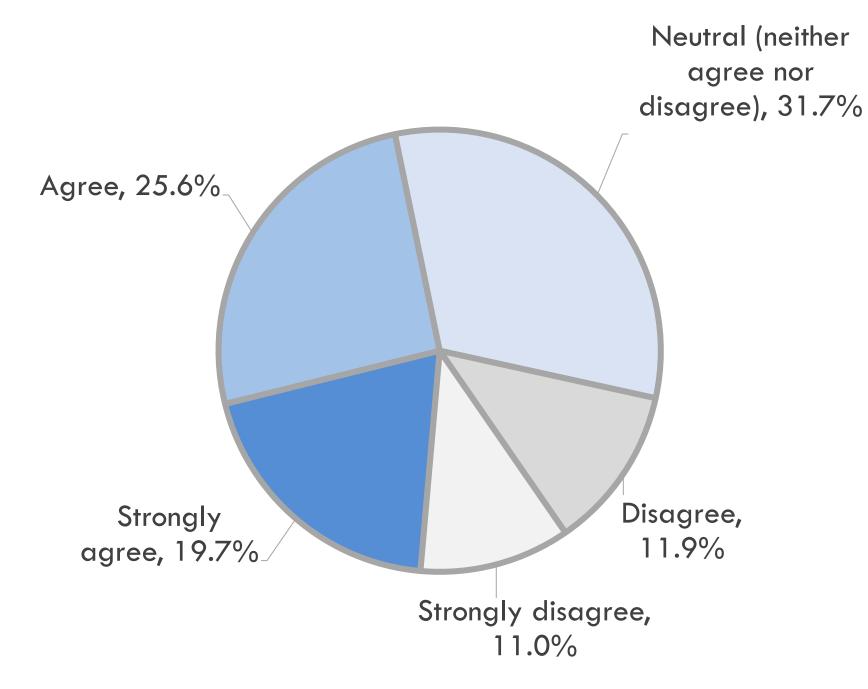




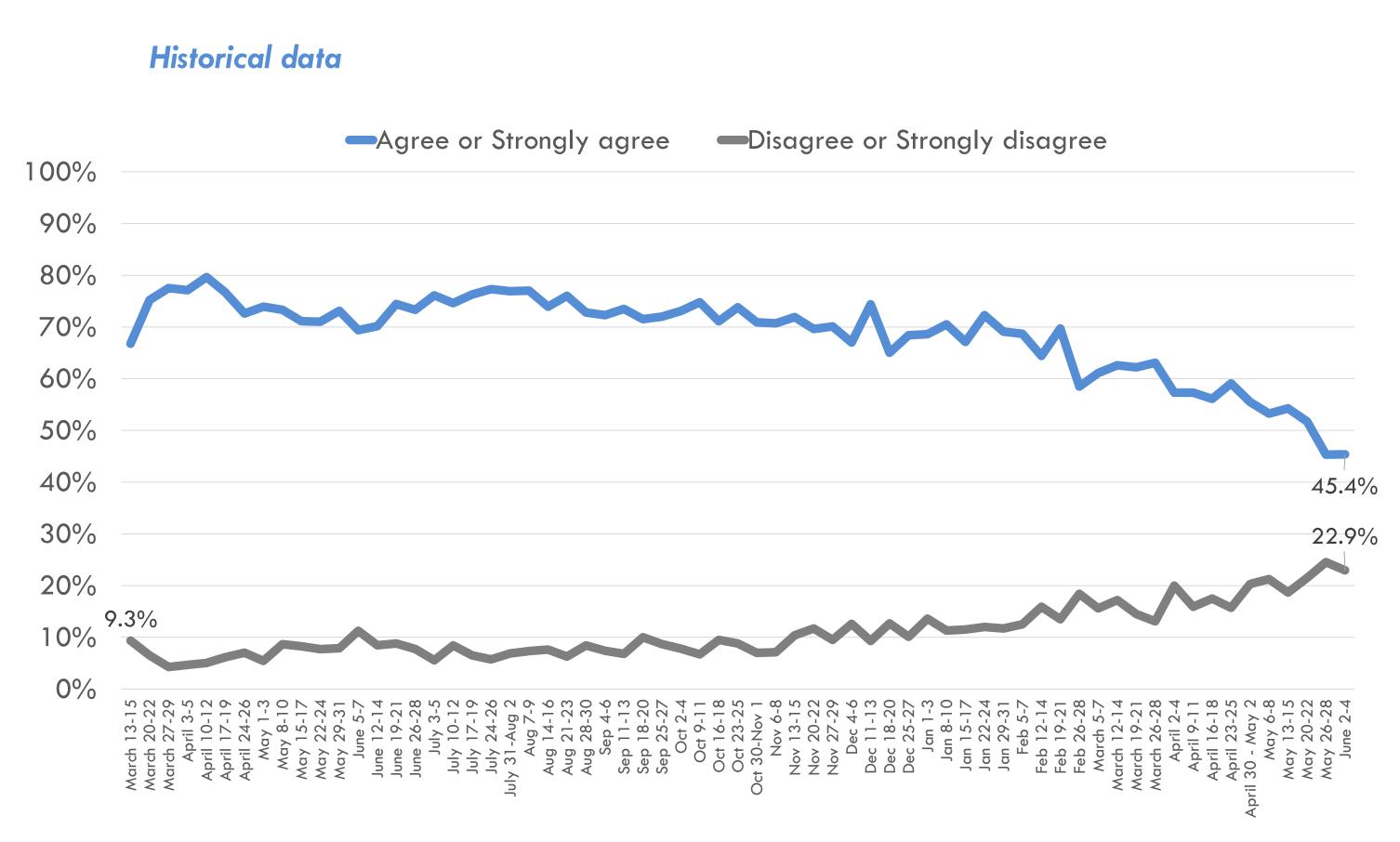
# AVOIDING CONVENTIONS & CONFERENCES

#### 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 1-65. 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, 1,206, 1,207, 1,206, 1,207, 1,206, 1,205, 1,206, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)



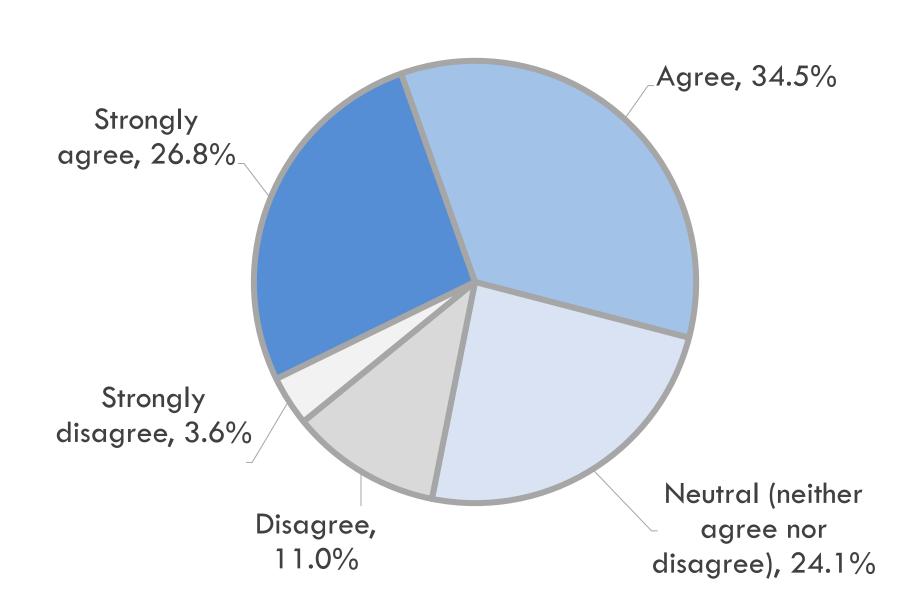




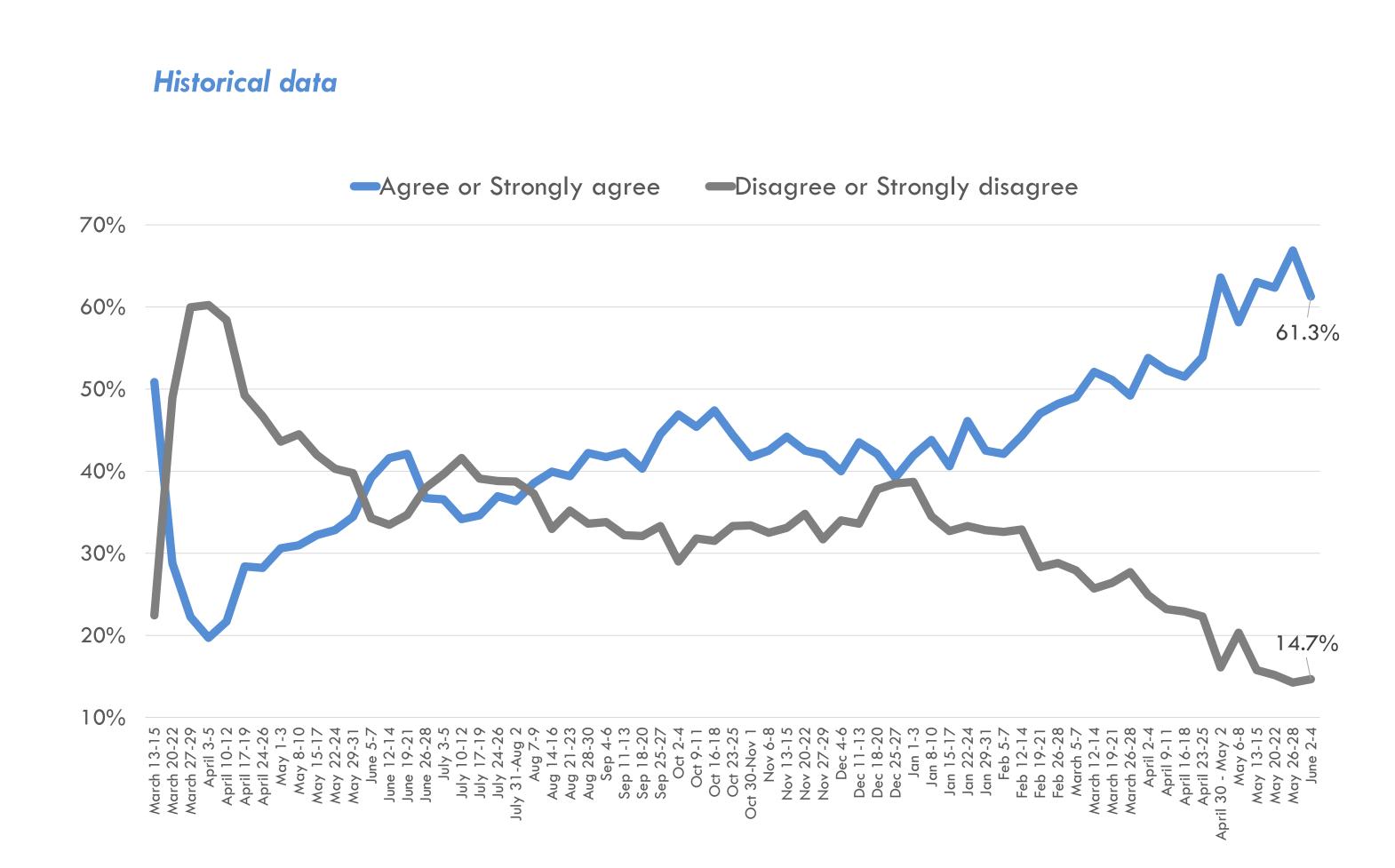
# COMFORT ENJOYING HOME COMMUNITY

#### 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.



(Base: Waves 1-65. 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, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

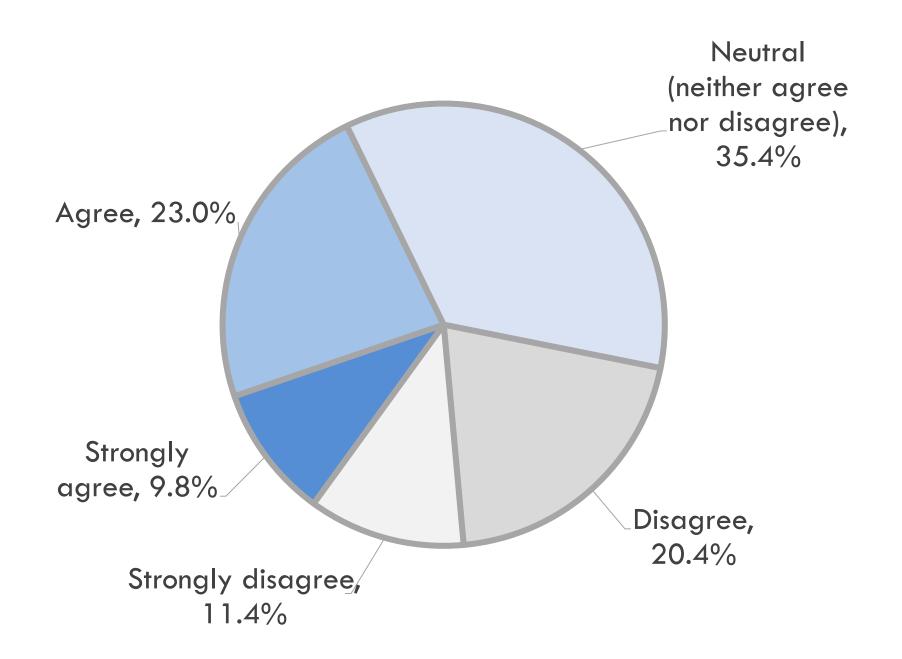




# TRAVELERS IN COMMUNITY ARE UNWANTED

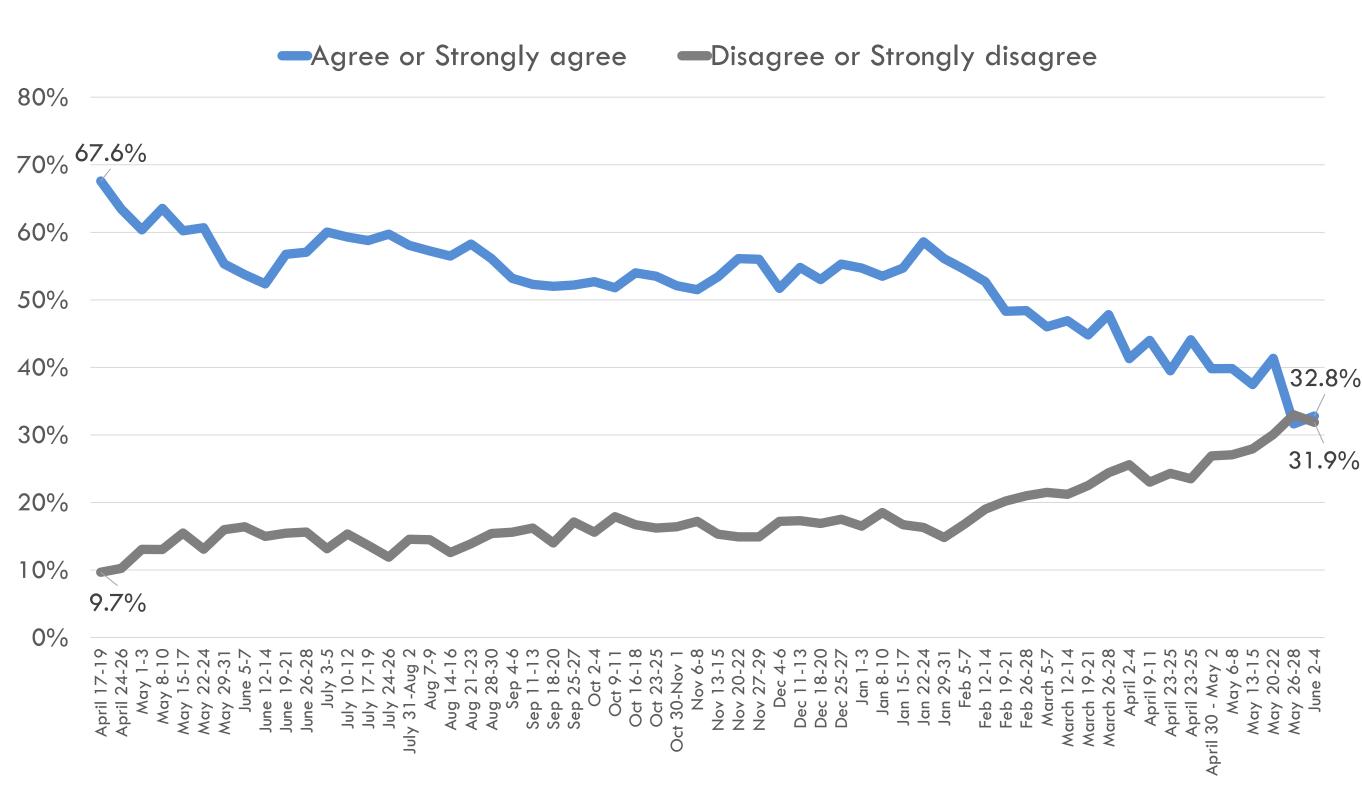
#### How much do you agree with the following statement?

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



(Base: Waves 6-65. 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, 1,206, 1,207, 1,206, 1,205, 1,206, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

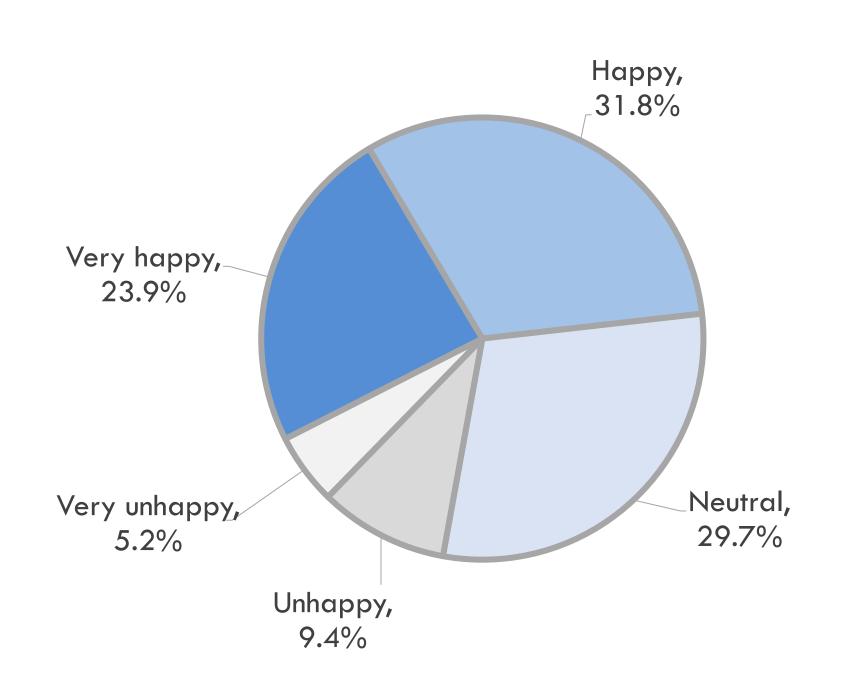






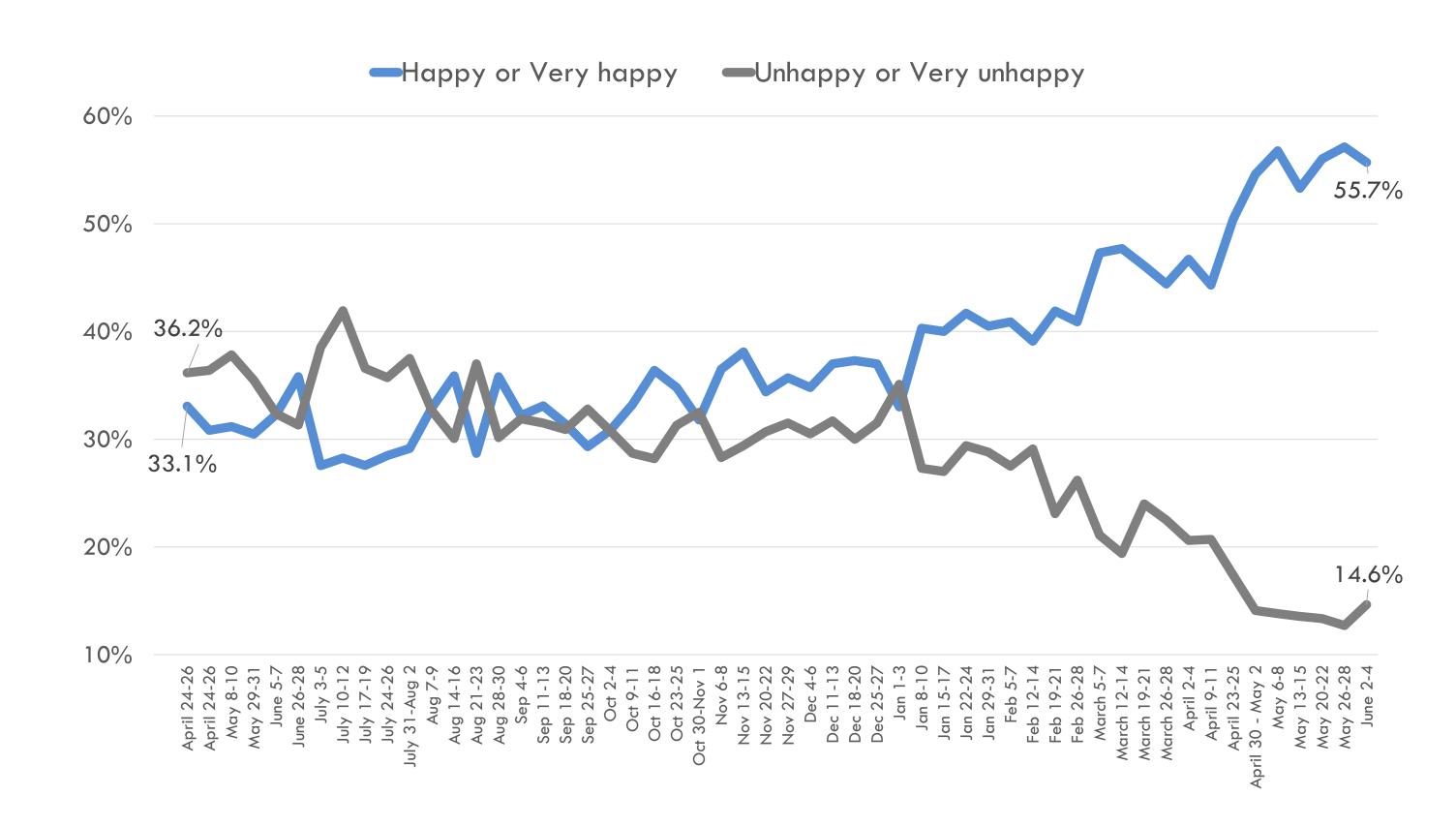
# FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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?

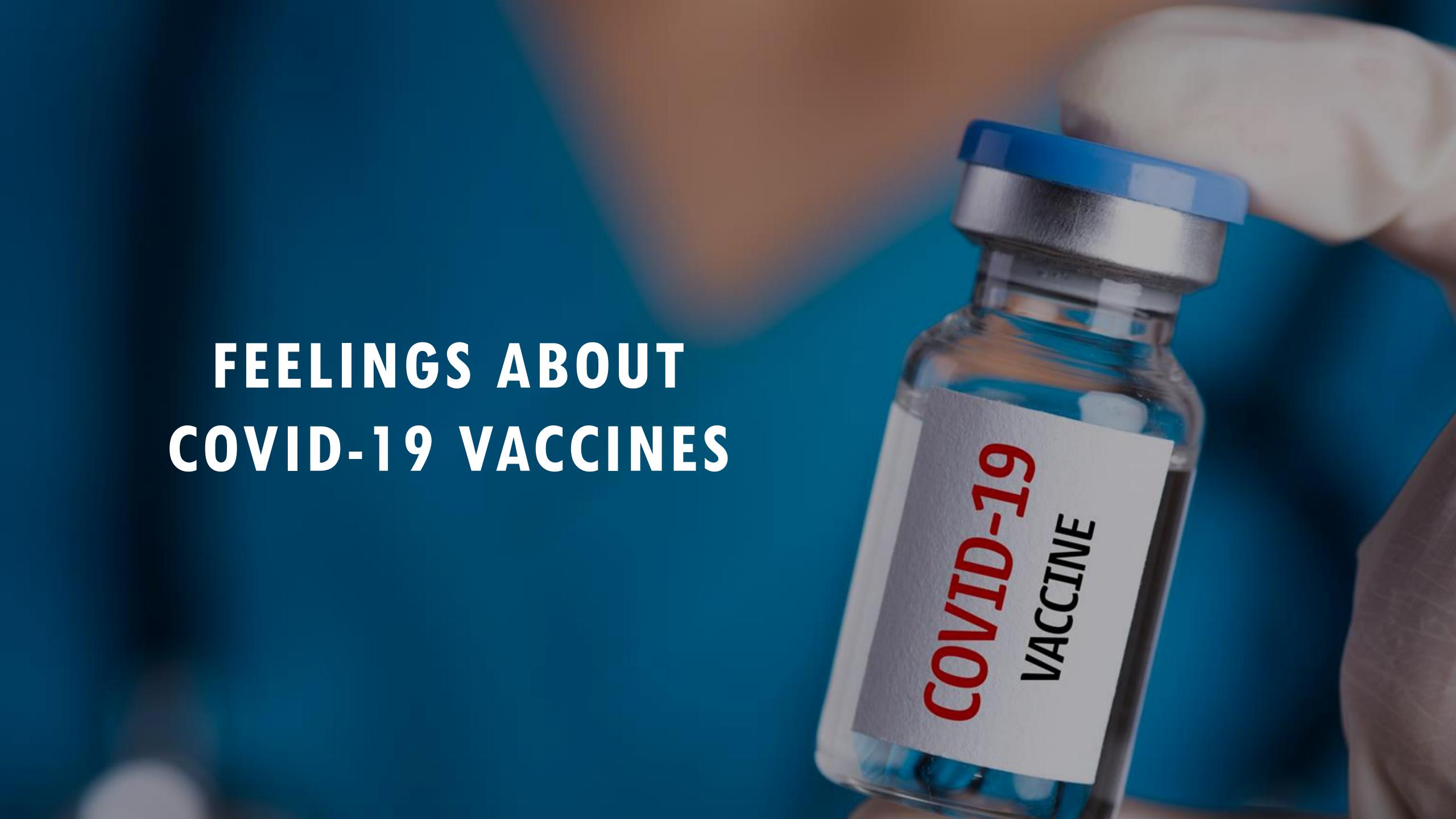


(Base: Waves 7-9, 12-13 and 16-65. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)

#### Historical data



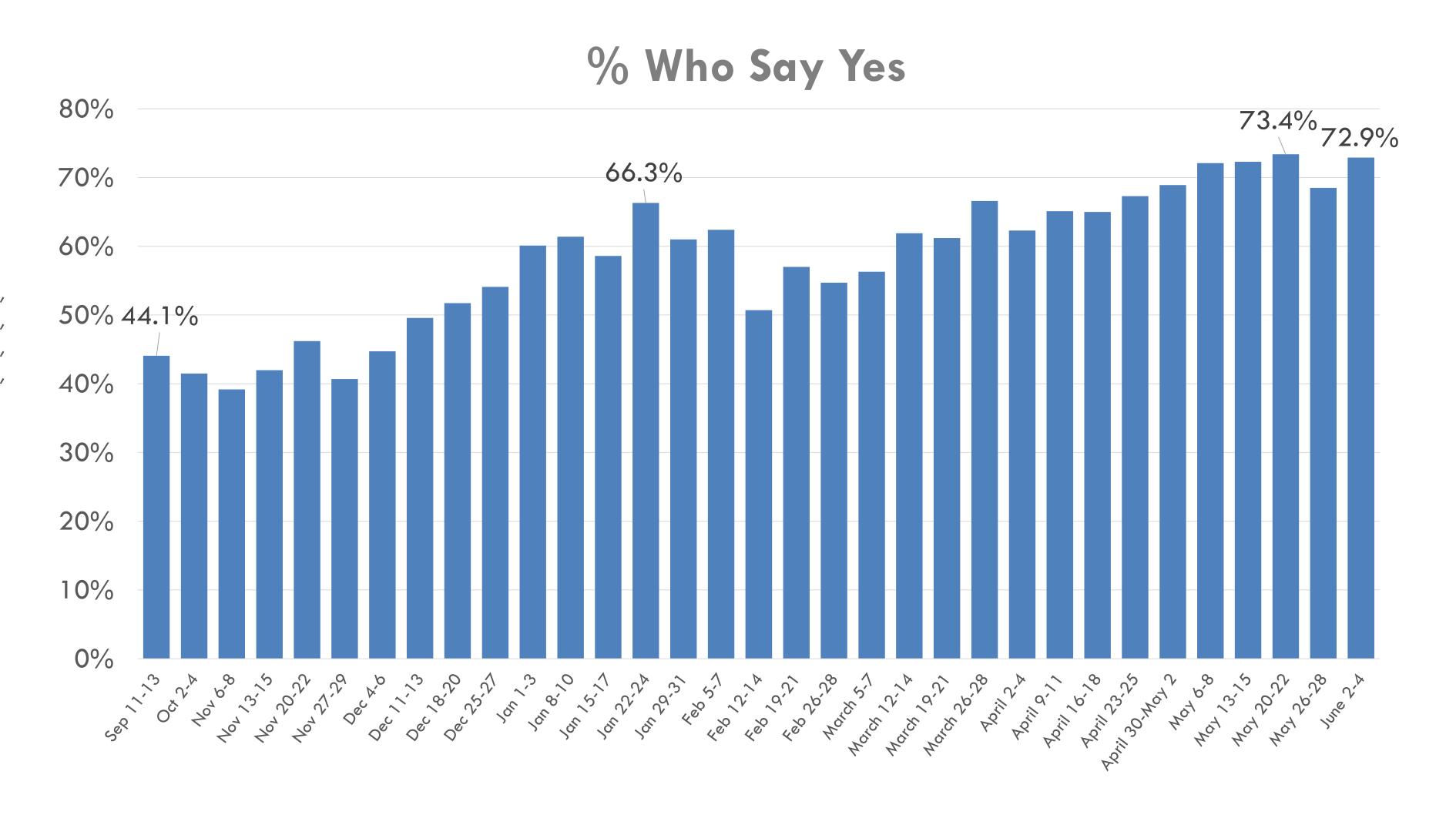




#### EXPECTATIONS TO TAKE A COVID-19 VACCINE

Question: Will you take (or have you already taken) one of the COVID-19 vaccines?

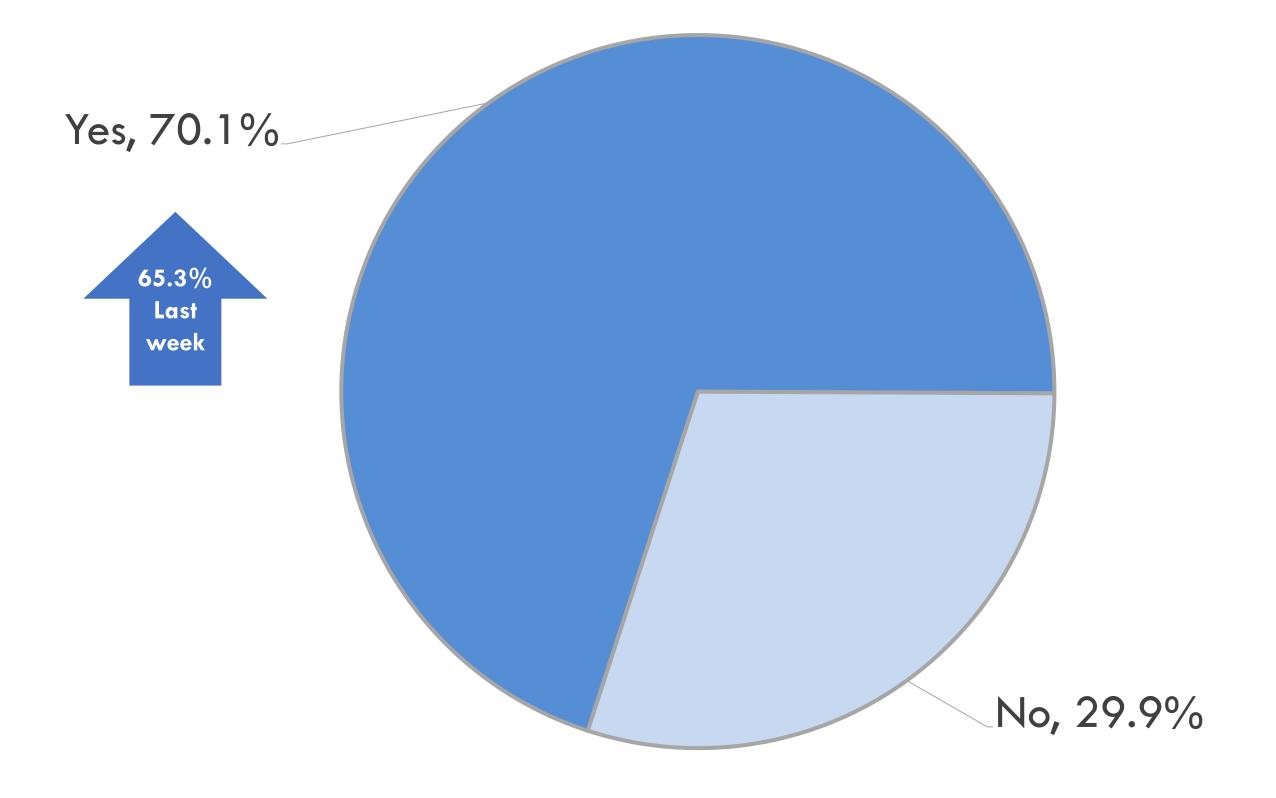
(Base: Waves 27, 30, 35-65 data. All respondents, 1,205, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,217, 1,206, 1,205, 1,208, 1,201, 1,215 and 1,217 completed surveys.)





# PERSONALLY RECEIVED A COVID-19 VACCINE

Question: Have you personally received a COVID-19 vaccine?

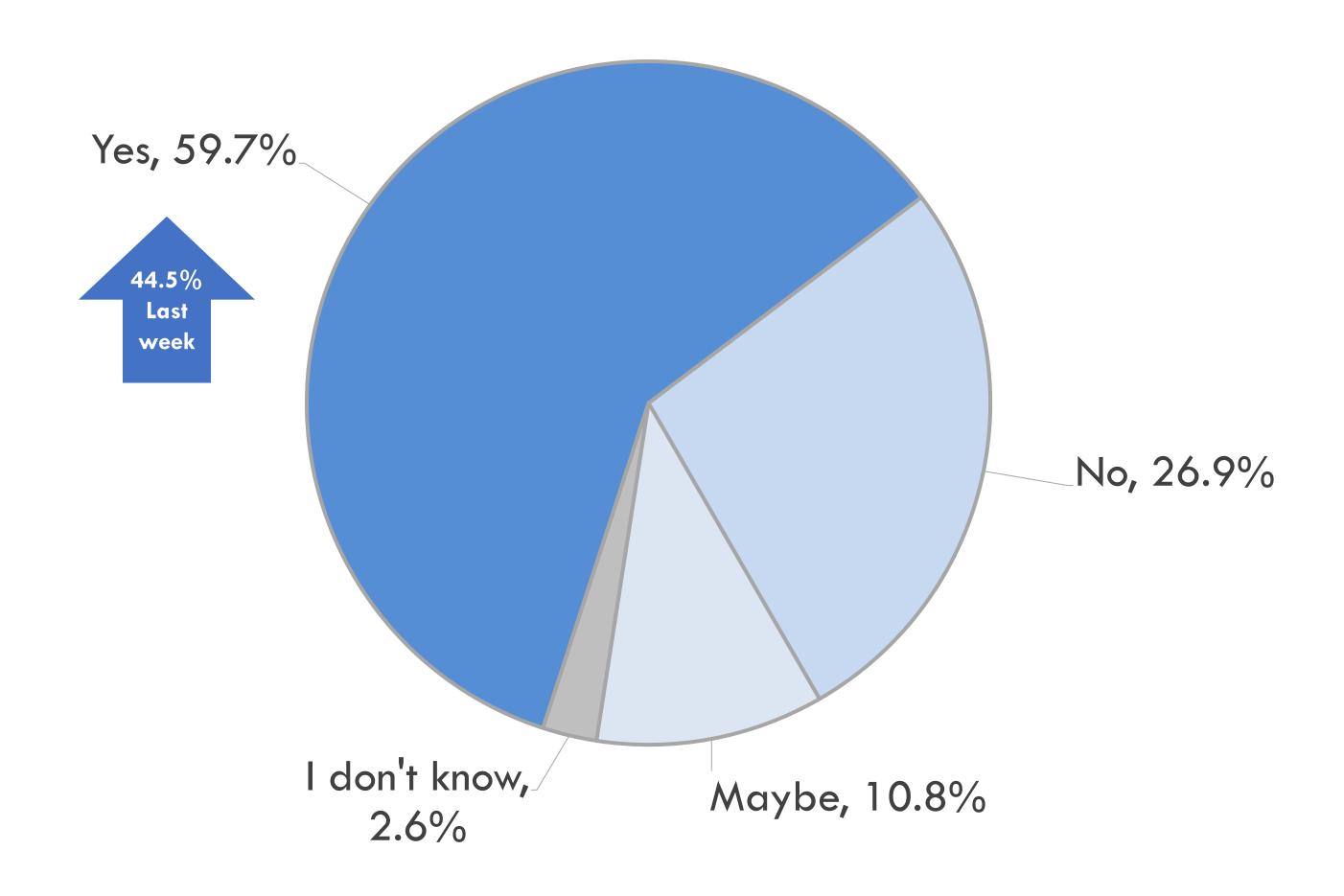




# VACCINES FOR CHILDREN

Question: Will you or have you had your children take a COVID-19 vaccine?

(Base: Wave 65 data. All respondents with school-aged children, 450 completed surveys. Data collected June 2-4, 2021)



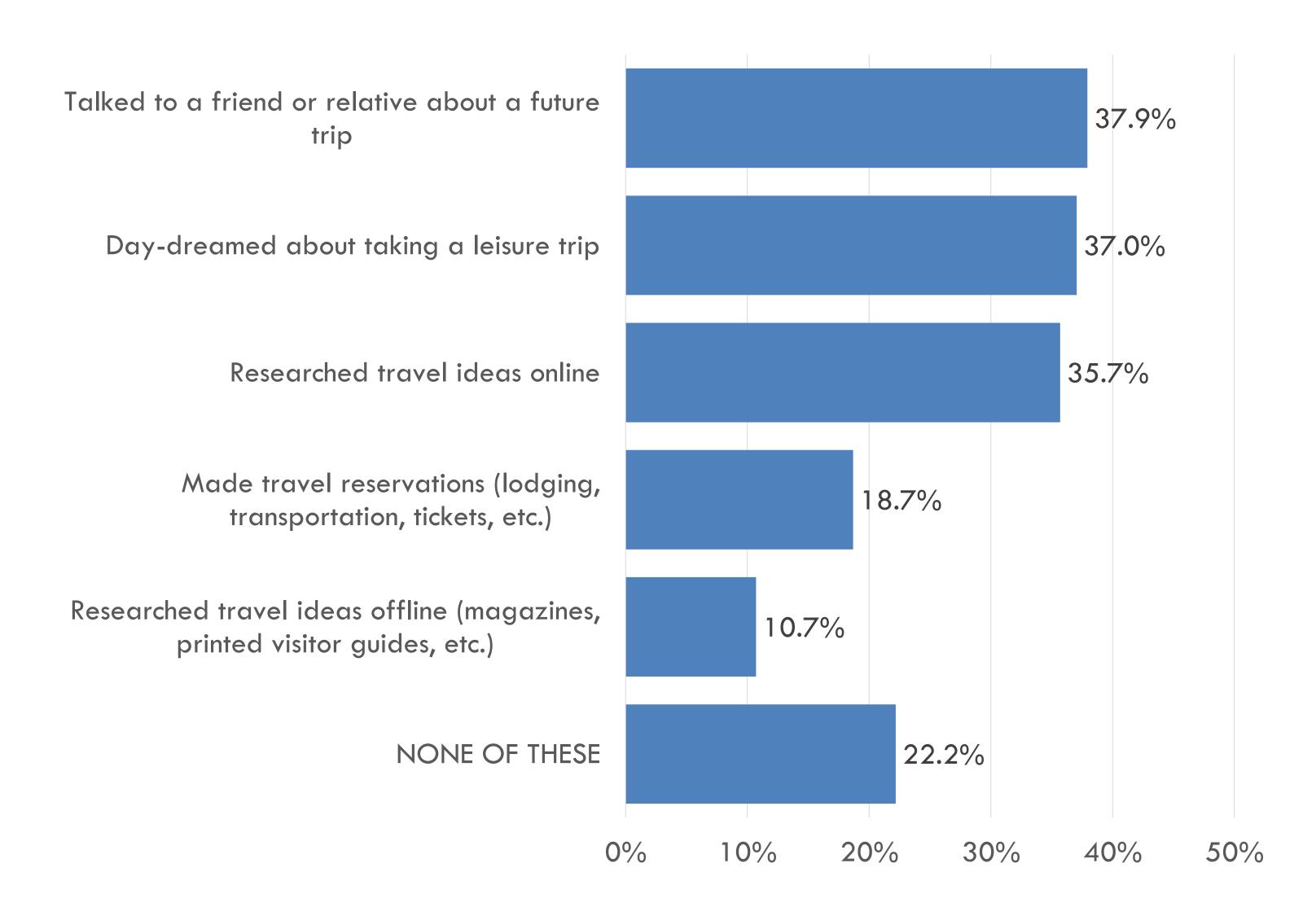




### TRAVEL PLANNING IN THE PAST WEEK

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

#### In the PAST WEEK I have

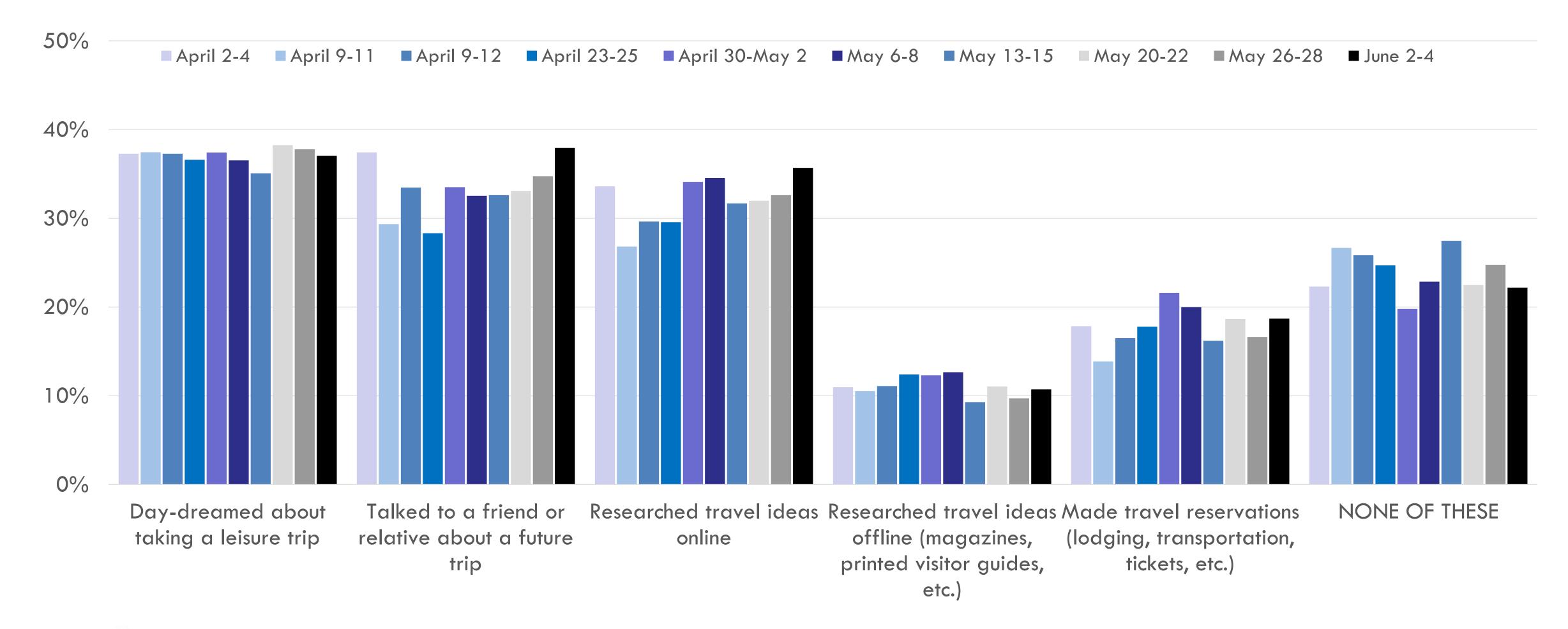




#### TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have \_\_\_\_\_

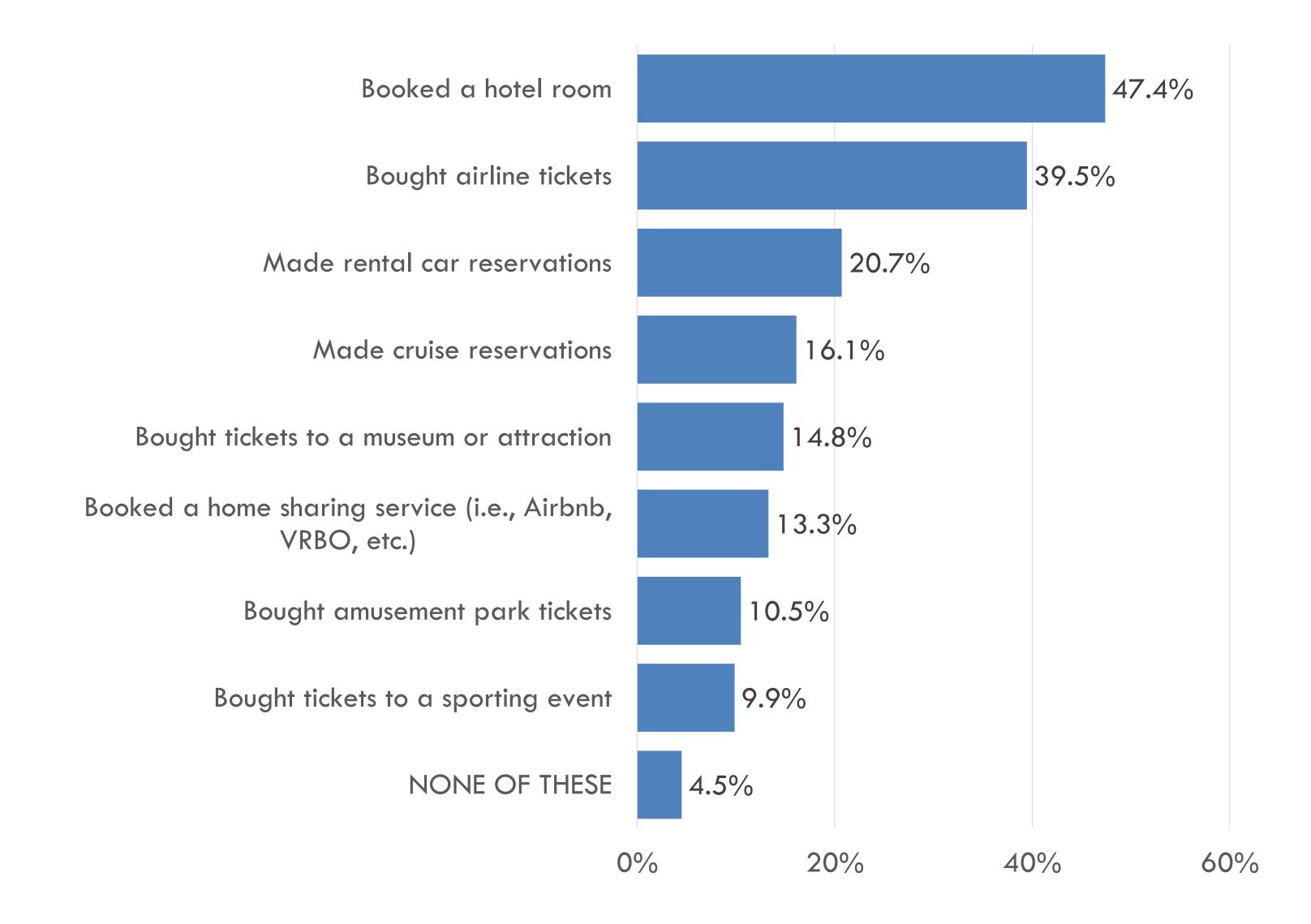




## TRAVEL RESERVATIONS MADE IN THE PAST WEEK

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

(Base: Wave 65 data. Respondents who made travel reservations this week, 210 completed surveys. Data collected June 2-4, 2021)

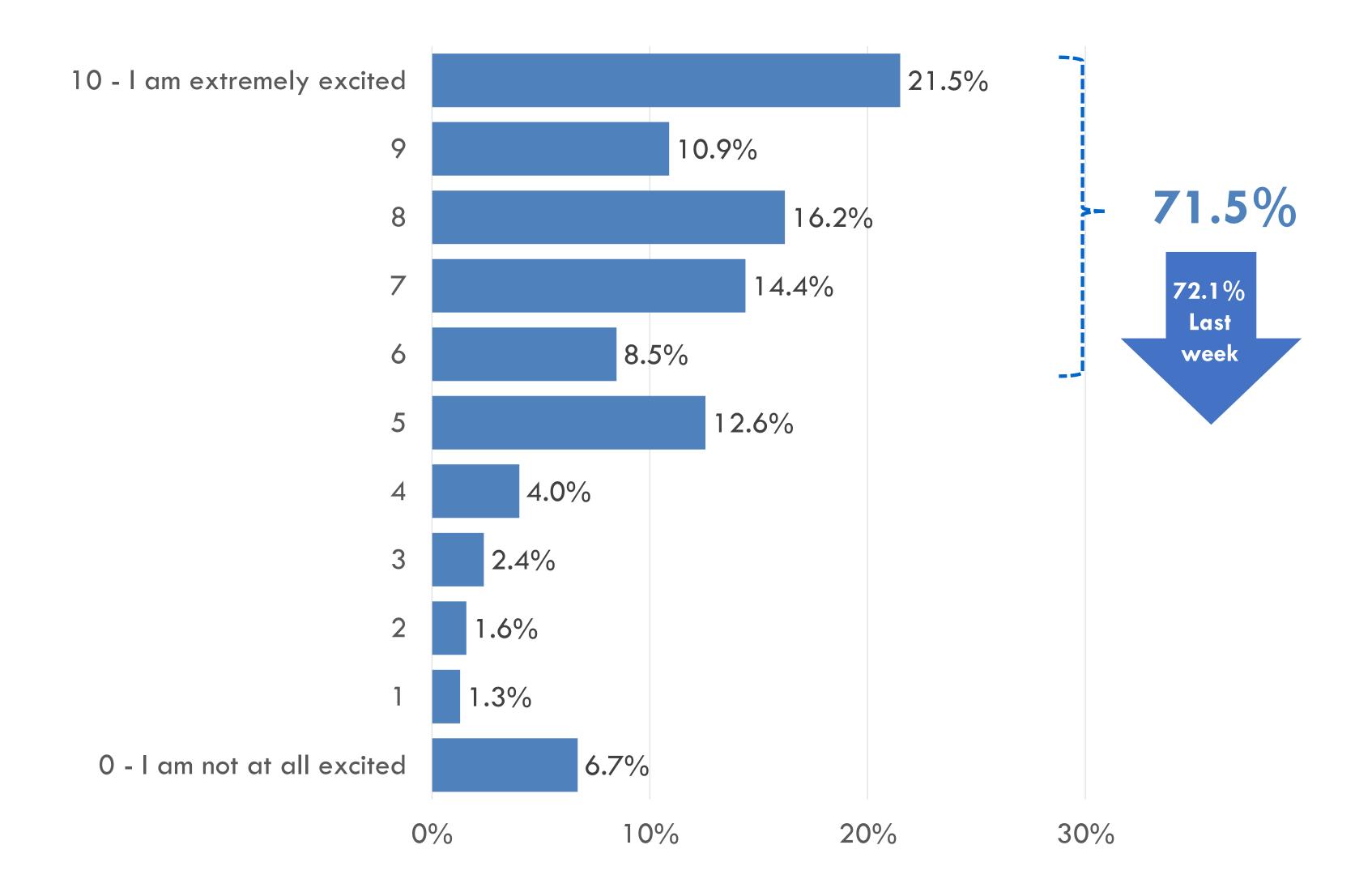






### EXCITEMENT FOR LEISURE TRAVEL IN 2021

Question: Which best describes how excited you are about LEISURE TRAVEL in this year (2021)? (Please answer using the 11-point scale below)

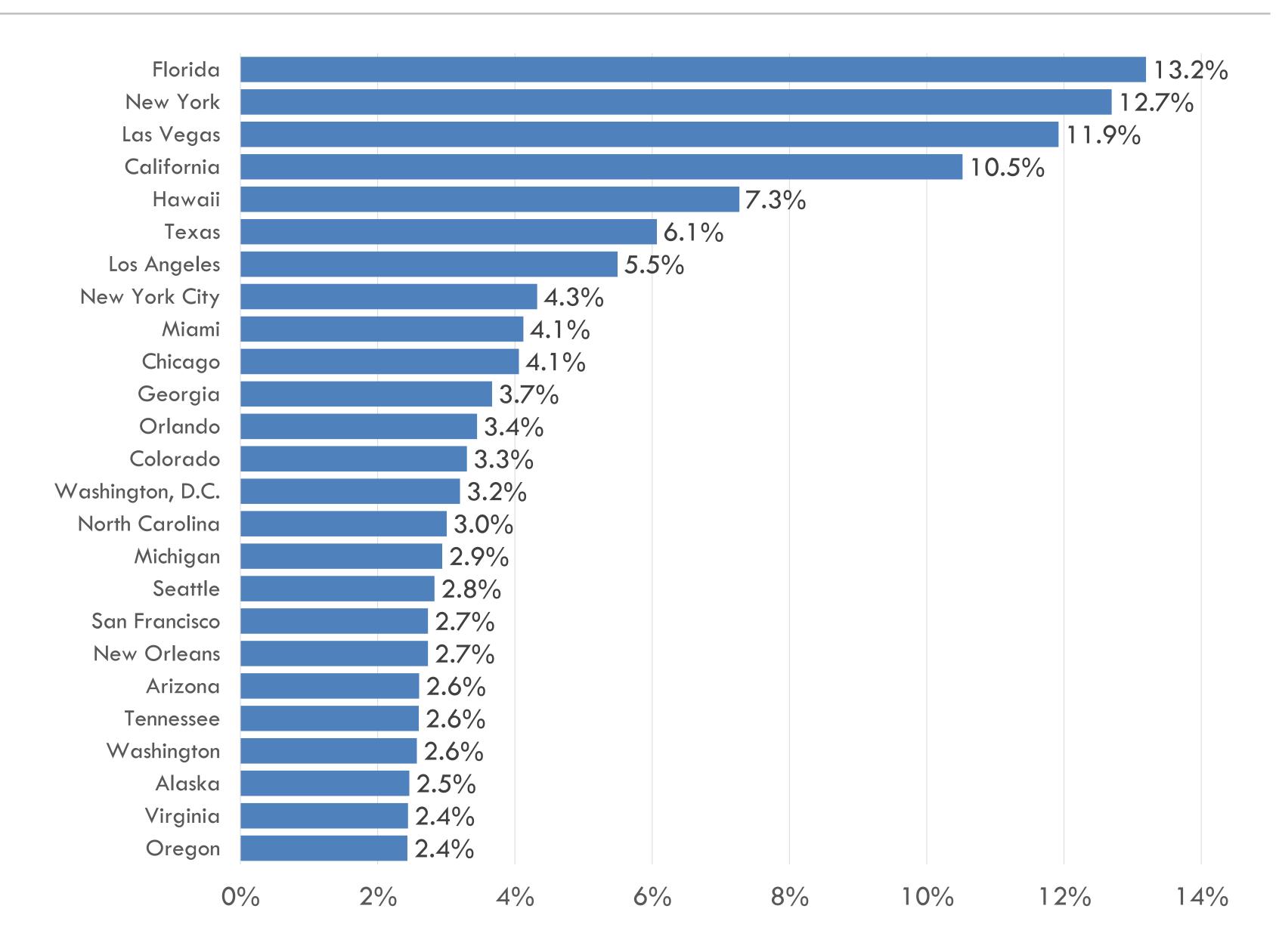




### MOST DESIRED DOMESTIC DESTINATIONS

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

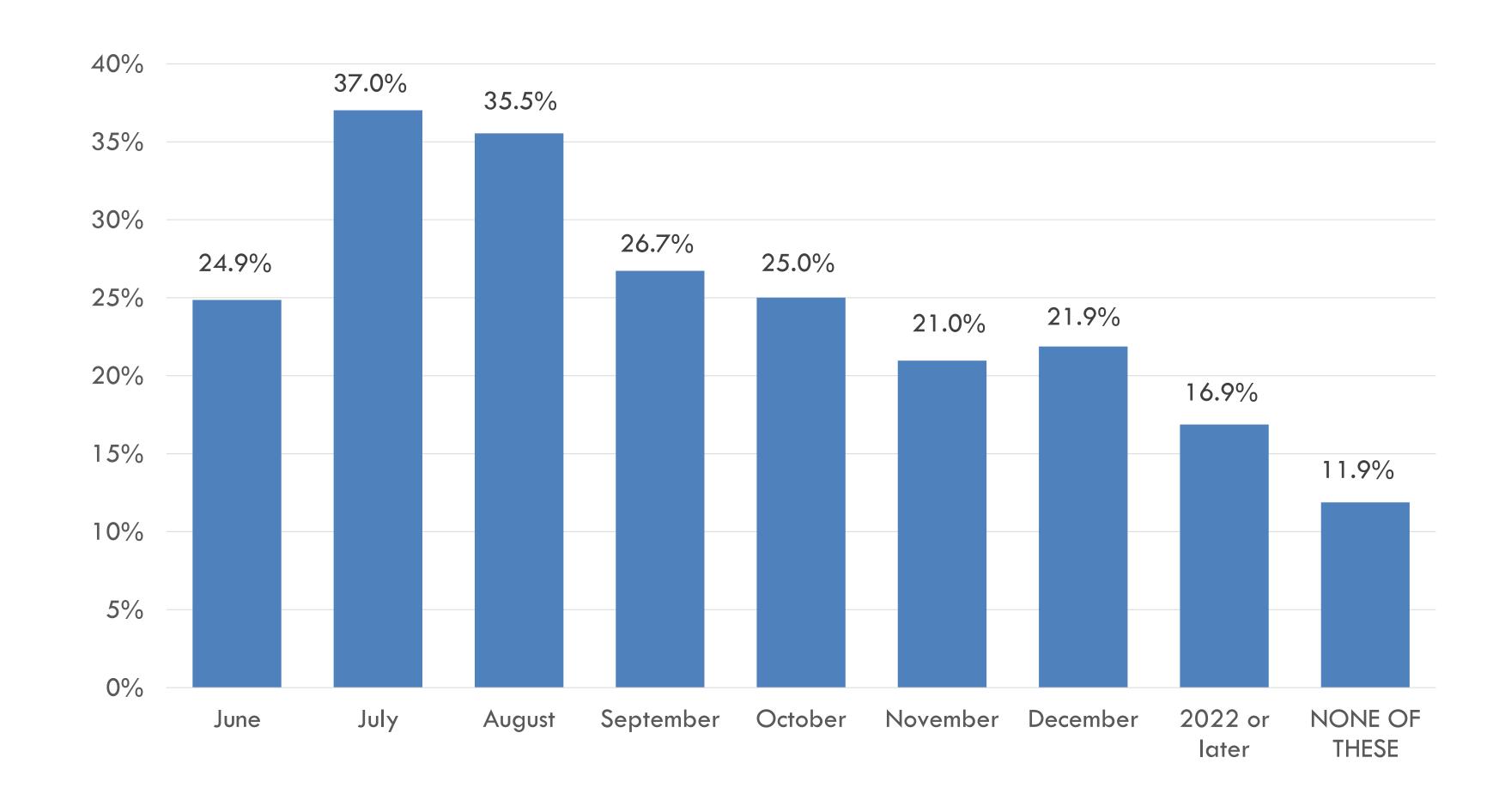
(Please only include destinations in the United States)





# 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)

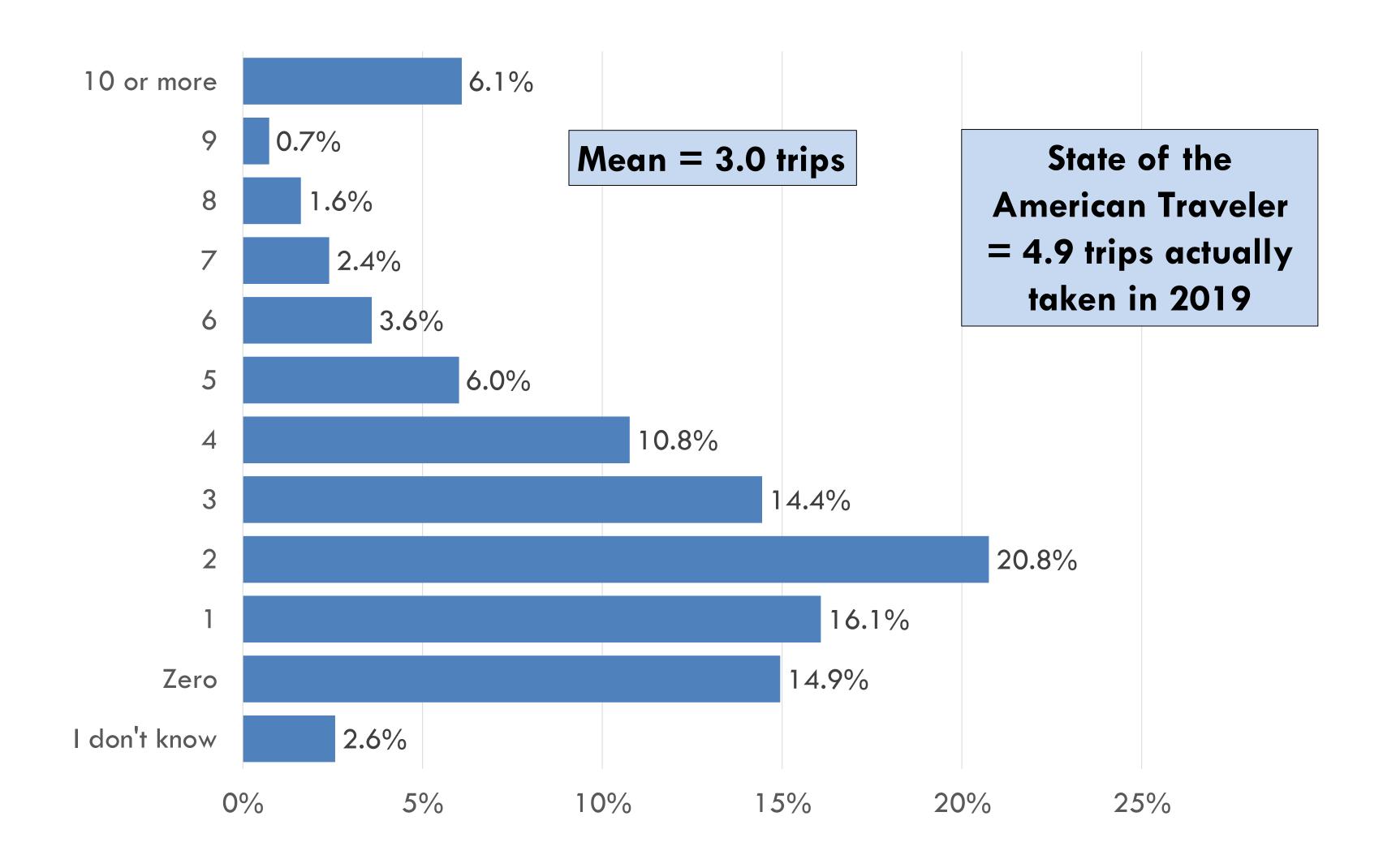




#### EXPECTED NUMBER OF LEISURE TRIPS IN 2021

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

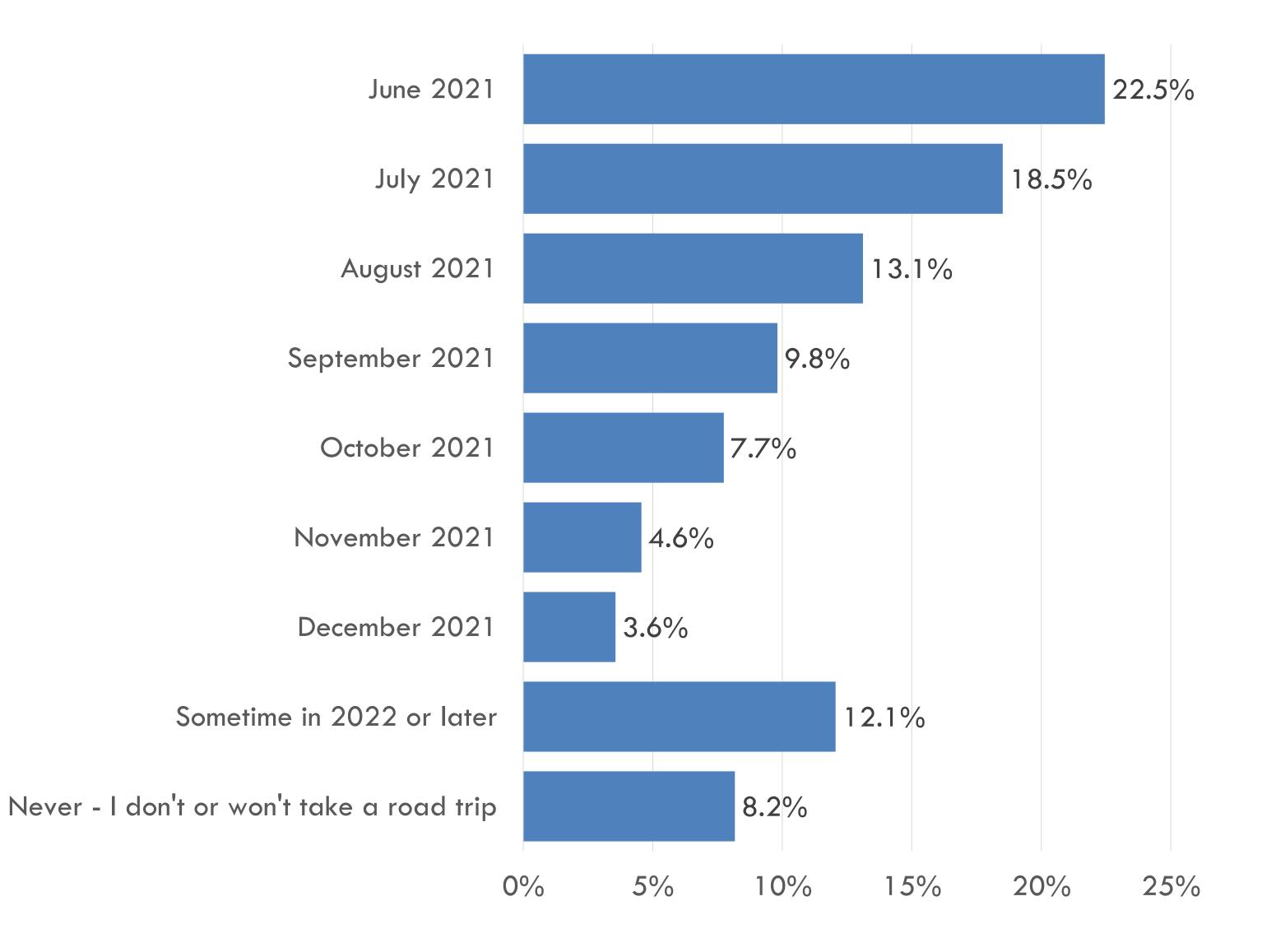
(Base: Wave 65 data. Respondents who have tentative plans to travel in 2021, 1,197 completed surveys. Data collected June 2-4, 2021)





# MONTH OF NEXT ROAD TRIP

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

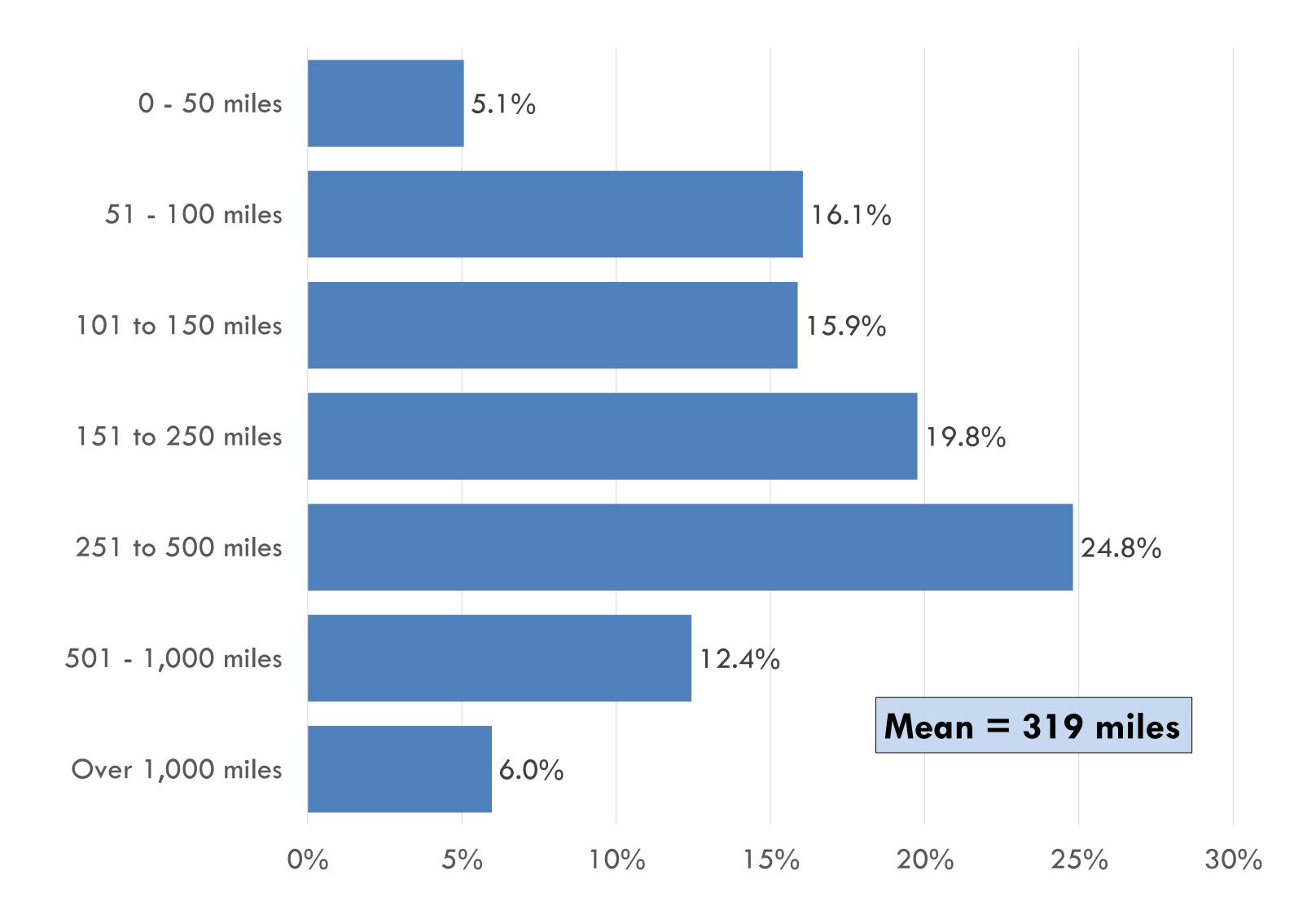




### NEXT ROAD TRIP: DISTANCE FROM HOME

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

(Base: Wave 65 data. Respondents taking road trips, 1,127 completed surveys. Data collected June 2-4, 2021)

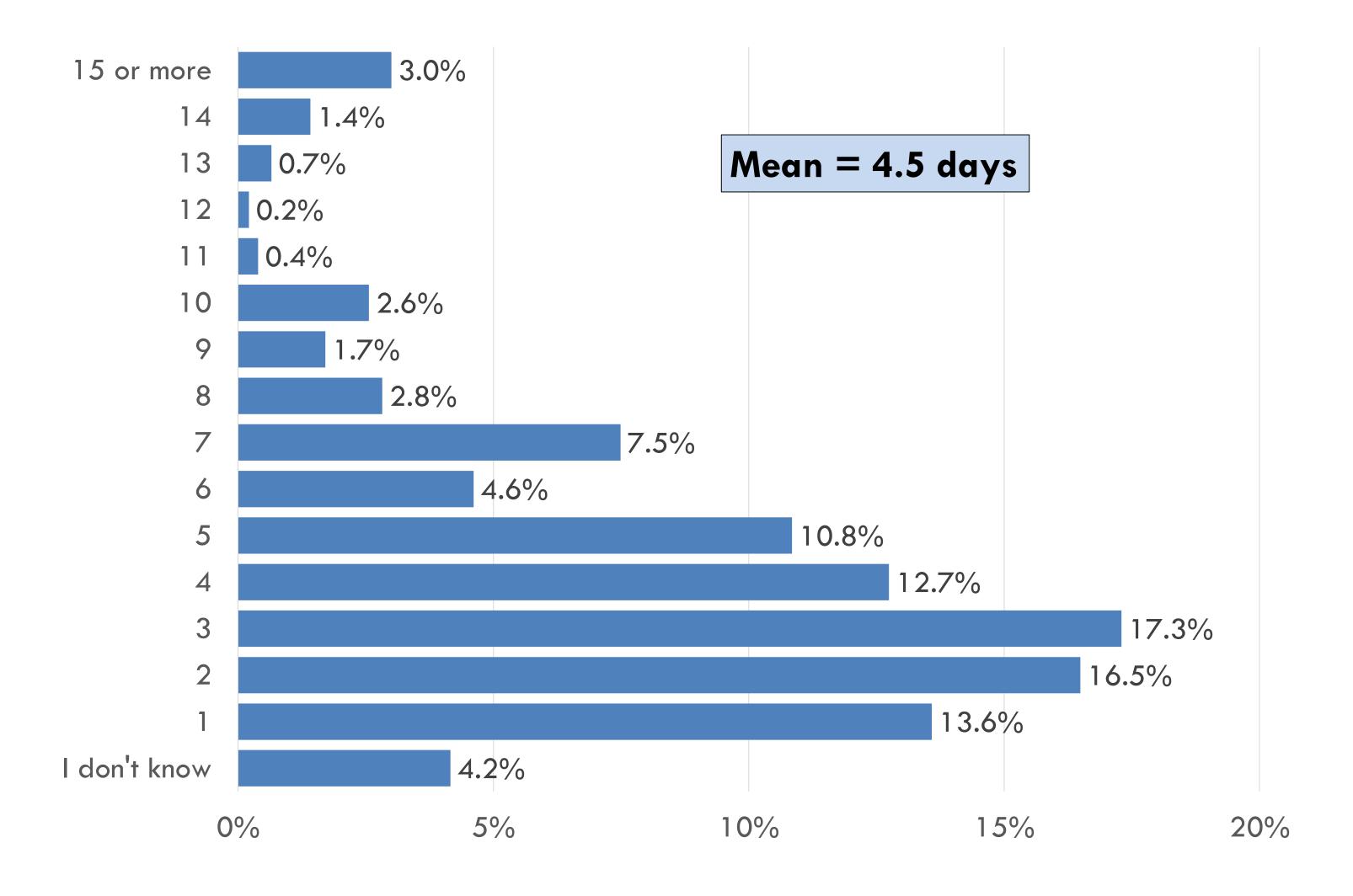




### NEXT ROAD TRIP: LENGTH OF TRIP

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

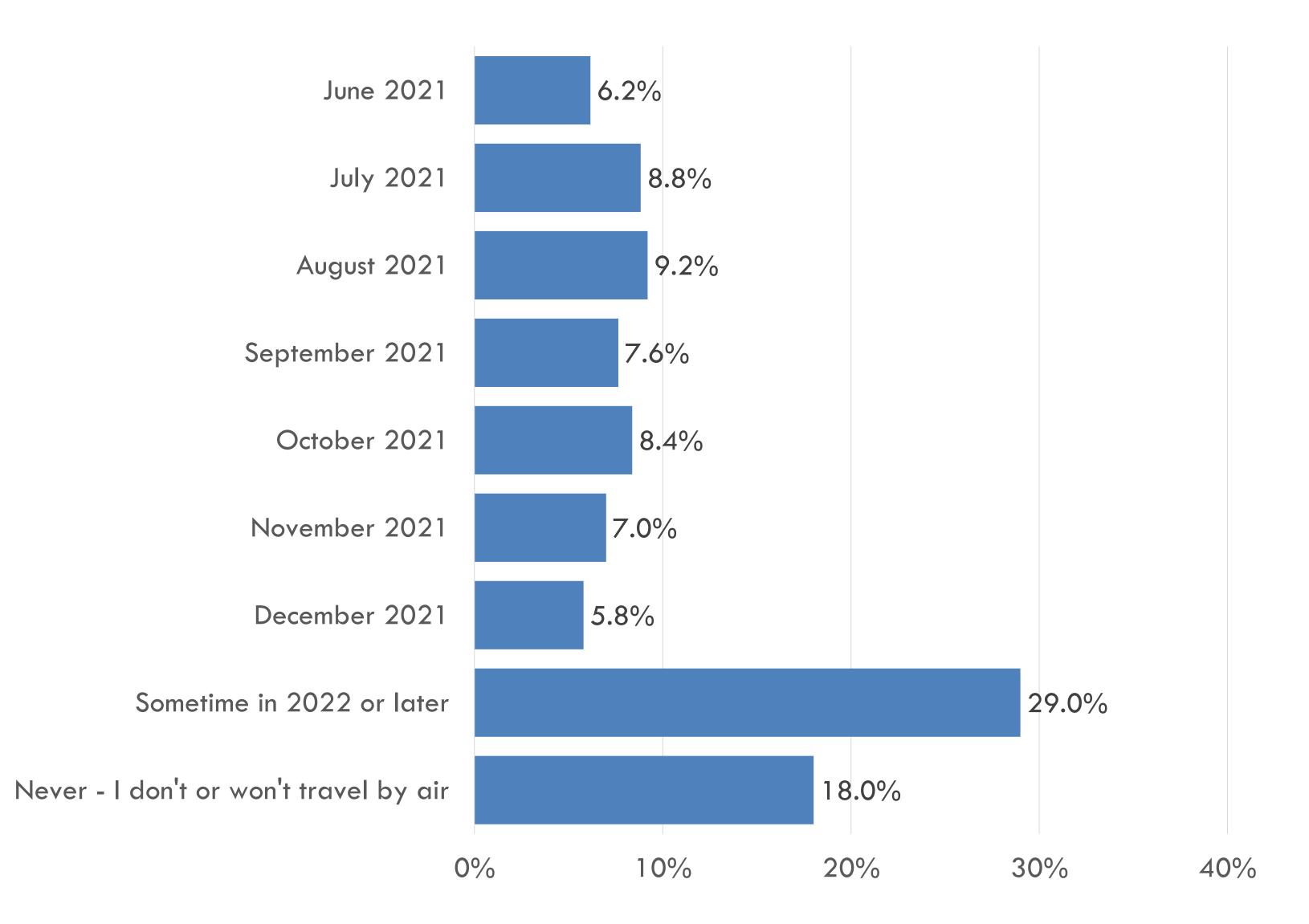
(Base: Wave 65 data. Respondents taking road trips, 1,082 completed surveys. Data collected June 2-4, 2021)





# MONTH OF NEXT COMMERCIAL AIRLINE FLIGHT

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

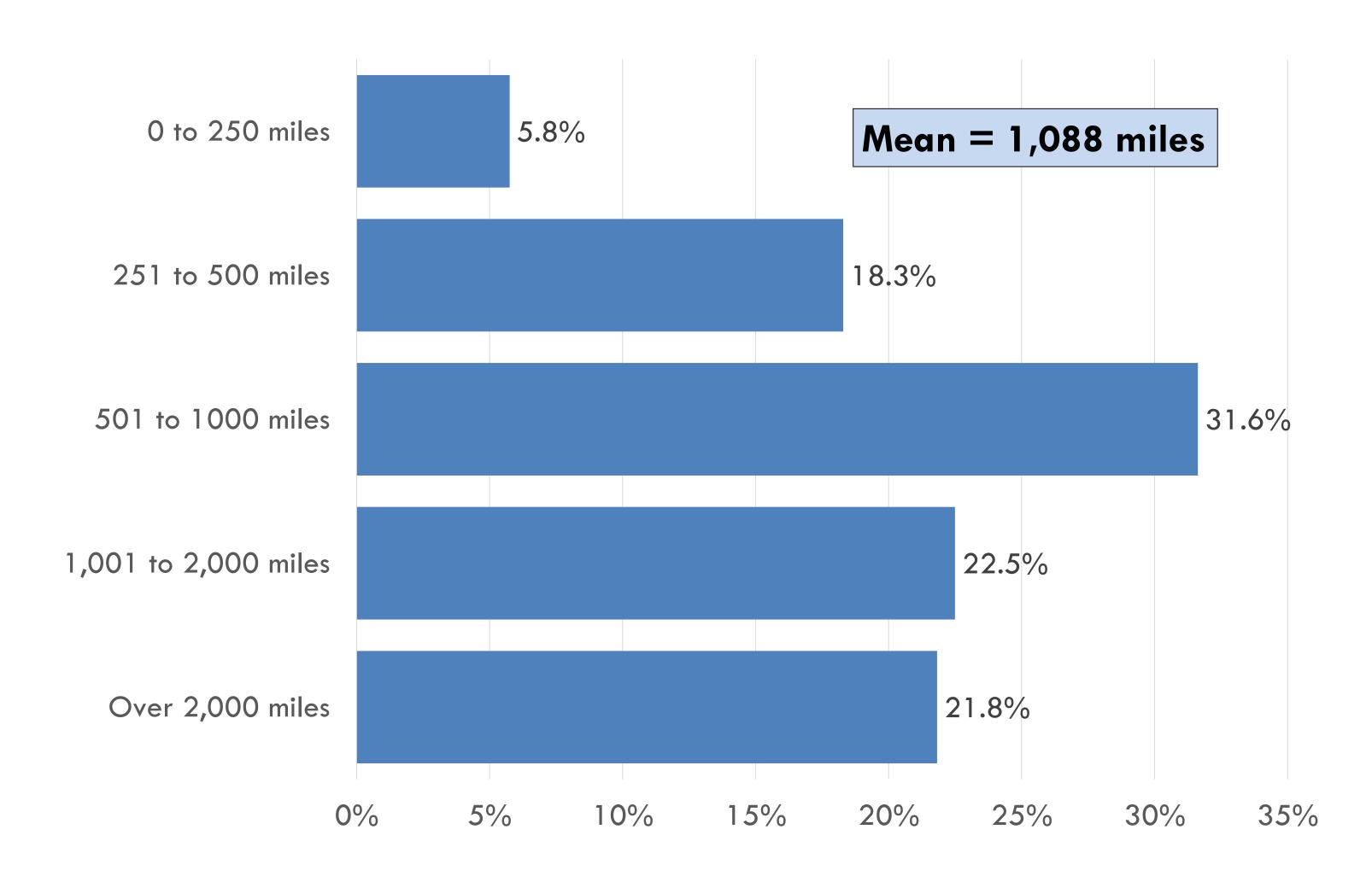




### NEXT COMMERCIAL AIRLINE TRIP: DISTANCE FROM HOME

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

(Base: Wave 65 data. Respondents taking commercial airline trips, 1,012 completed surveys. Data collected June 2-4, 2021)

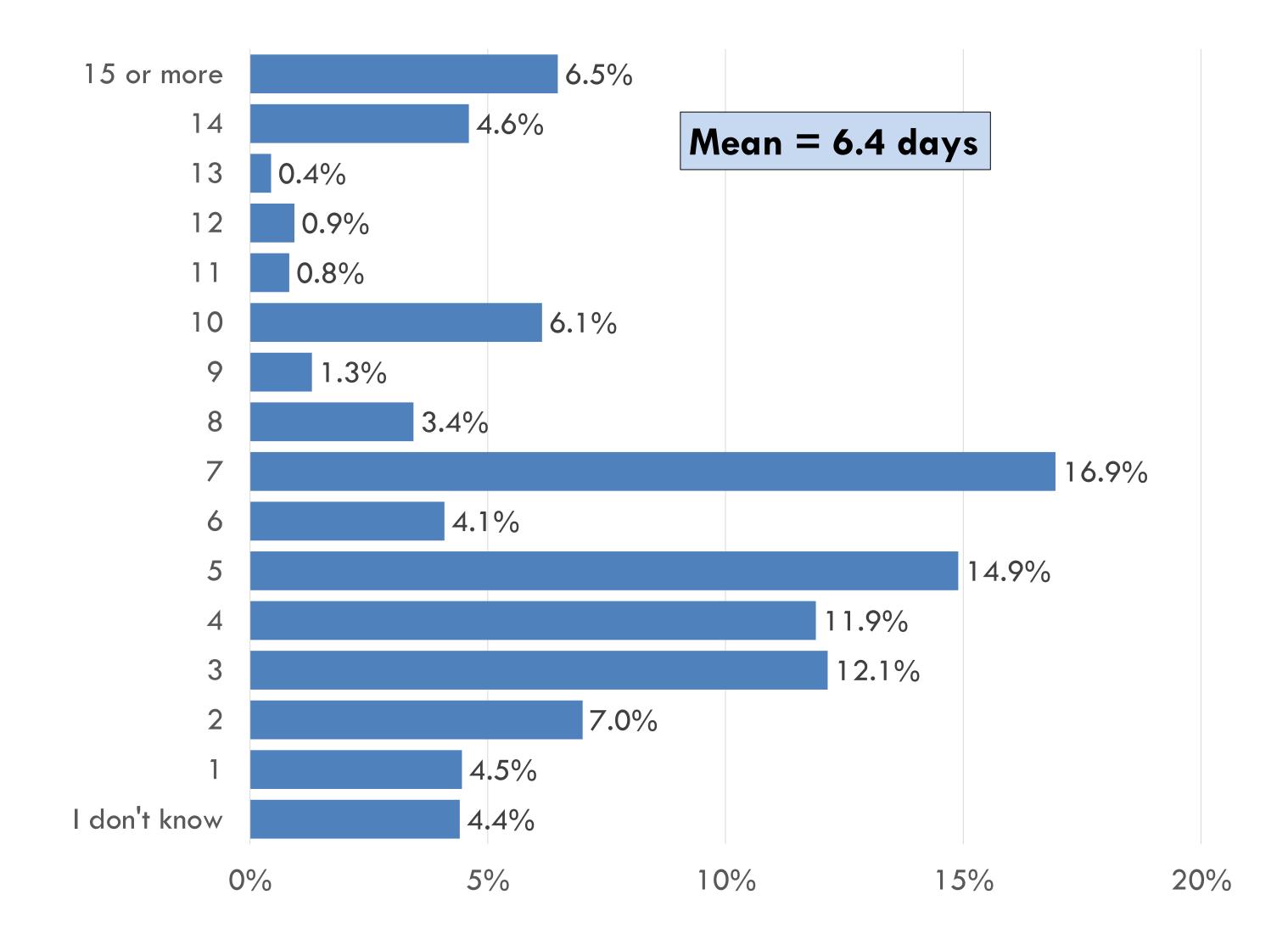




#### NEXT COMMERCIAL AIRLINE TRIP: LENGTH OF TRIP

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

(Base: Wave 65 data. Respondents taking commercial airline trips, 971 completed surveys. Data collected June 2-4, 2021)

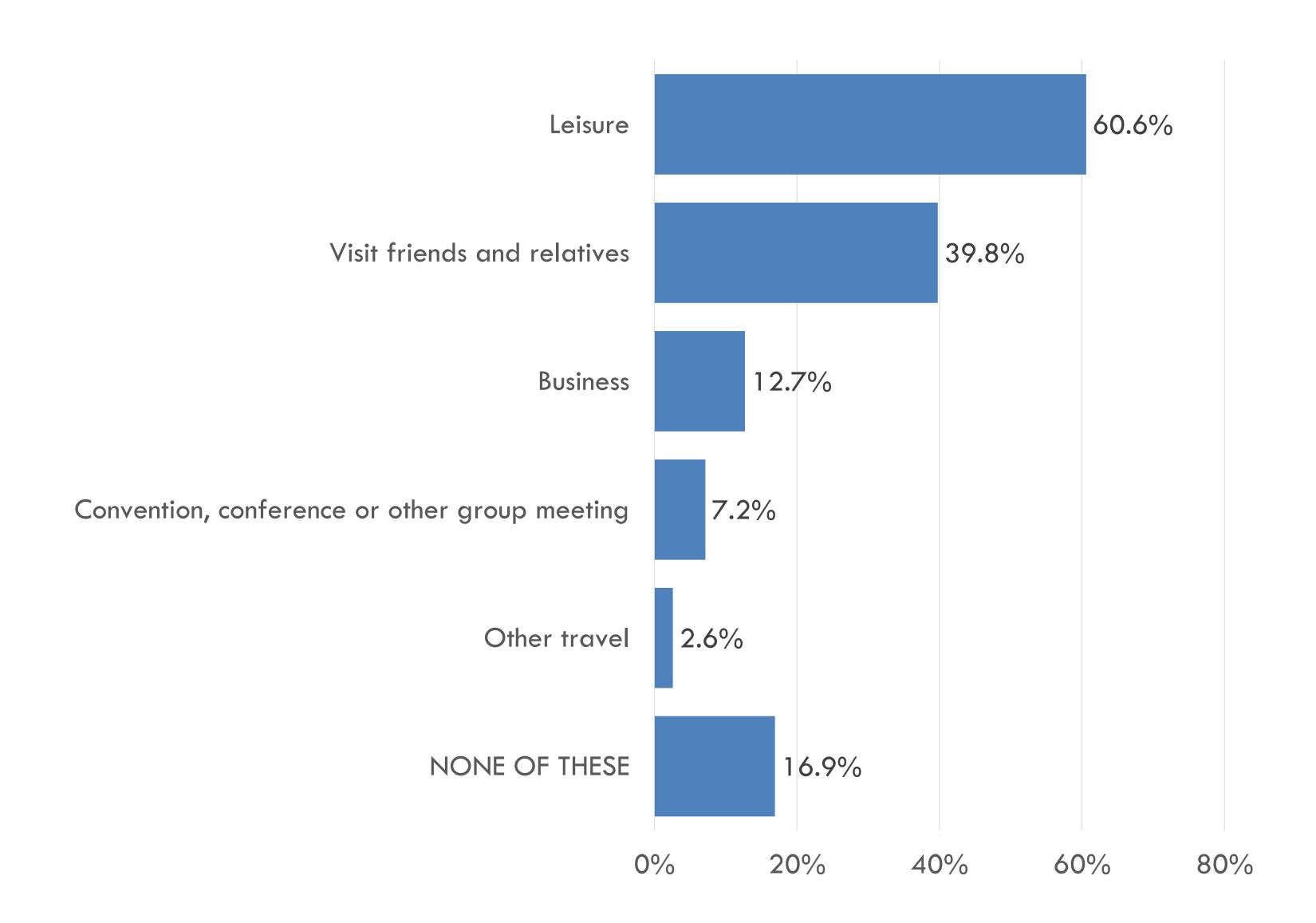






# TRAVEL EXPECTED IN THE NEXT 3 MONTHS: TRIP TYPE

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

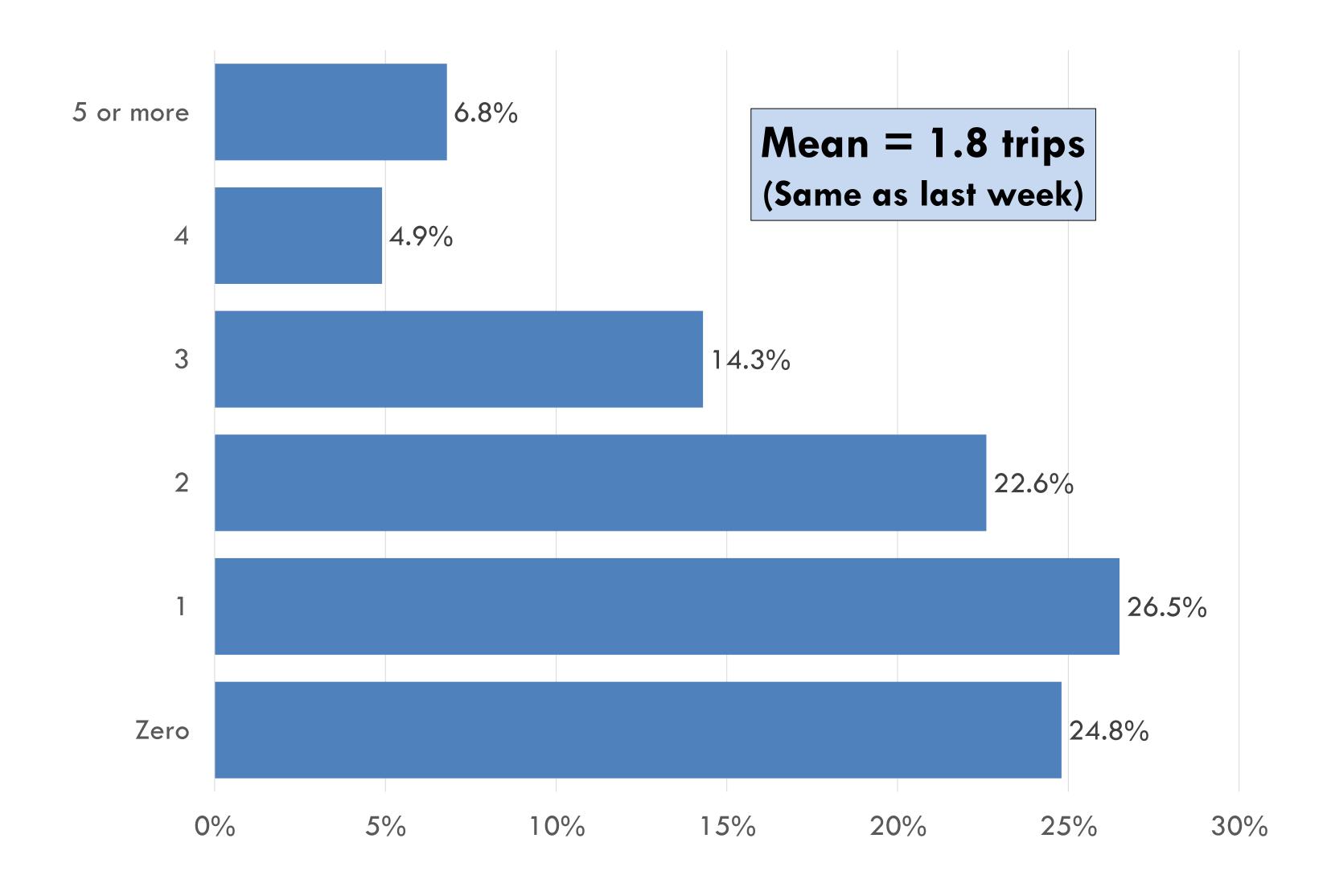




# LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

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

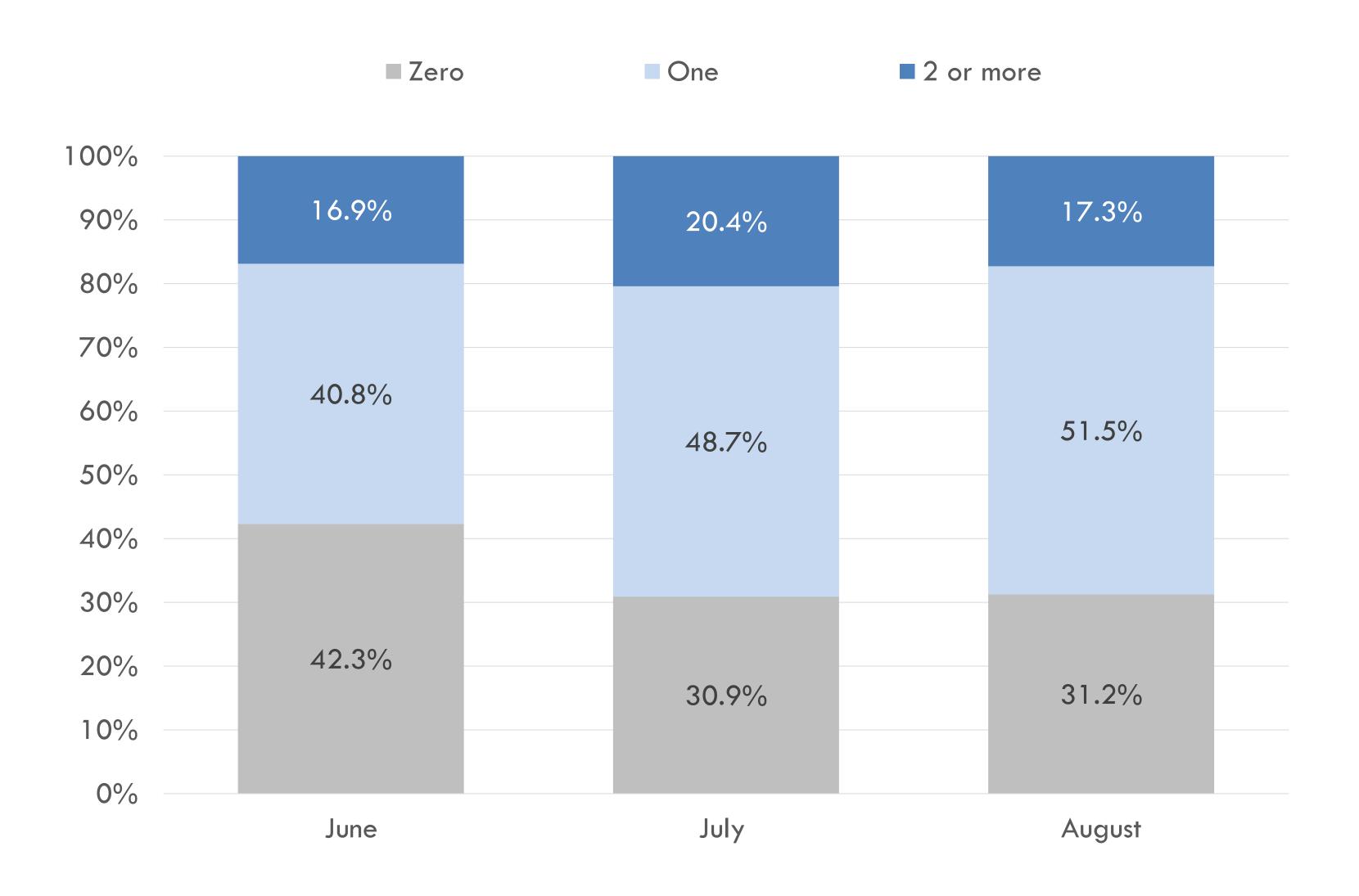
I expect to take \_\_\_\_\_ leisure trips





# LEISURE TRIPS EXPECTED (BY MONTH)

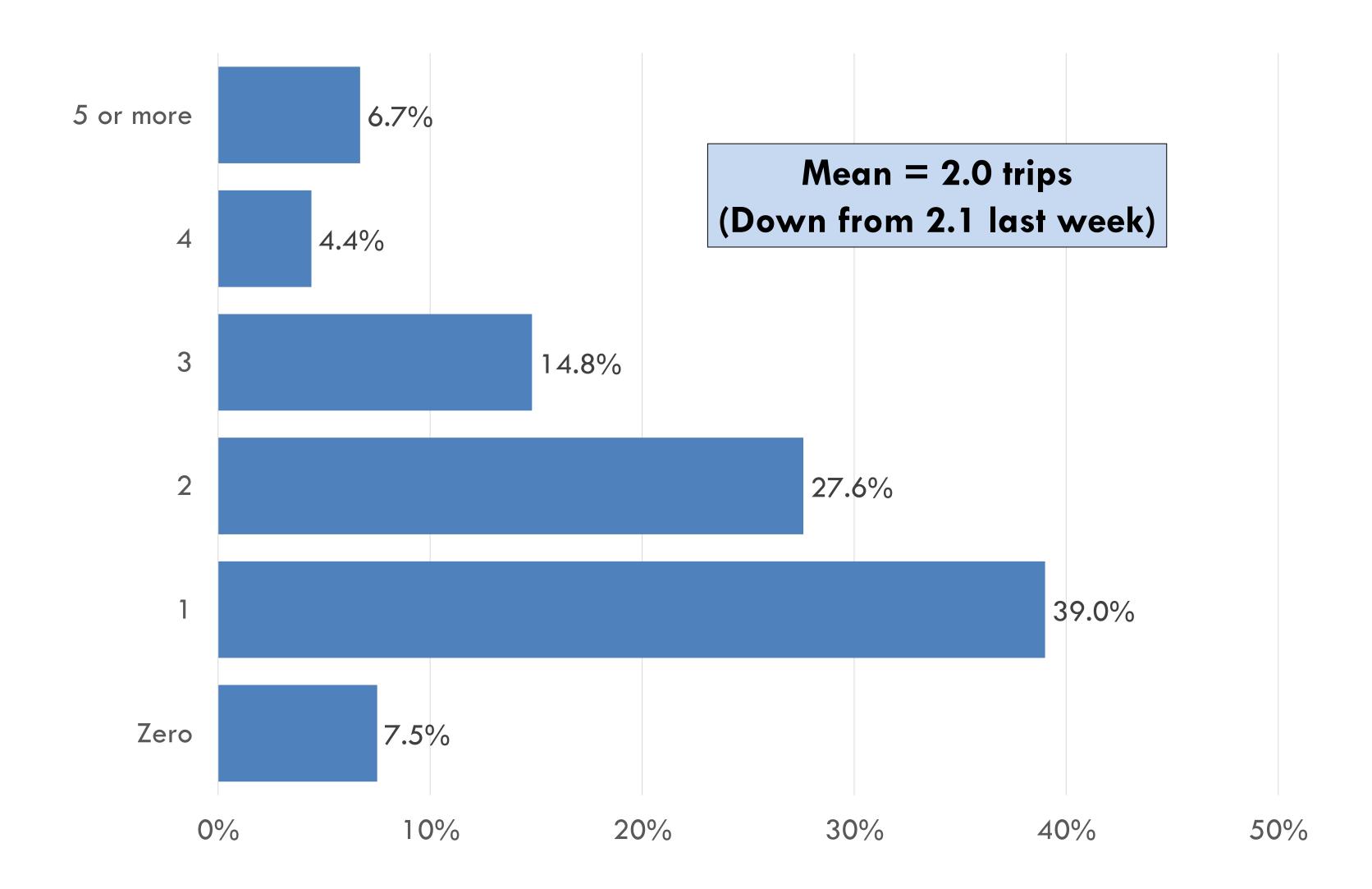
Question: How many leisure trips do you expect to take (even if tentatively) in each of these months?





# OVERNIGHT TRIPS EXPECTED (NEXT 3 MONTHS)

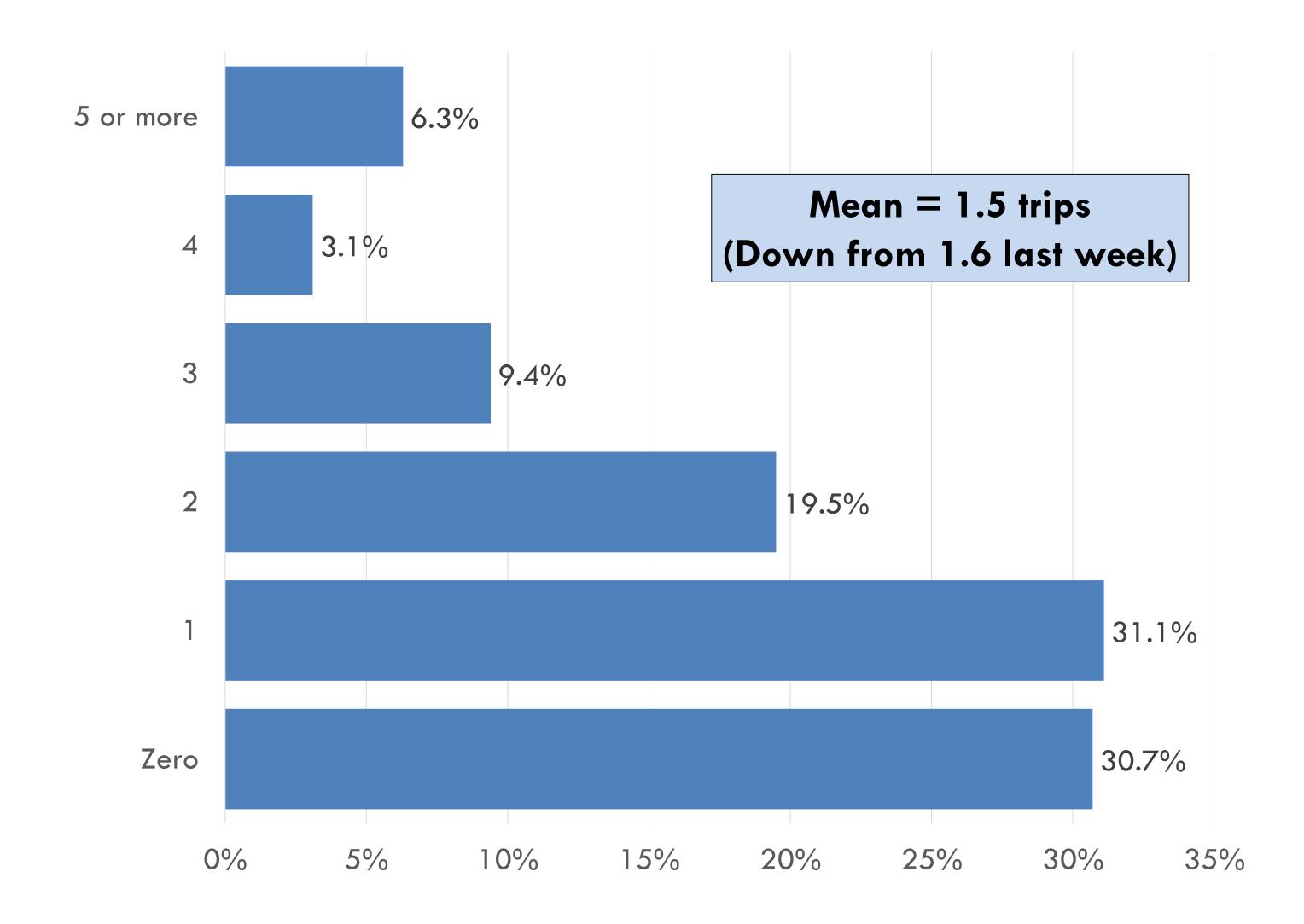
Question: How many of these leisure trips will be OVERNIGHT TRIPS (i.e., trips including at least one night away from your home)?





# REGIONAL TRIPS EXPECTED (NEXT 3 MONTHS)

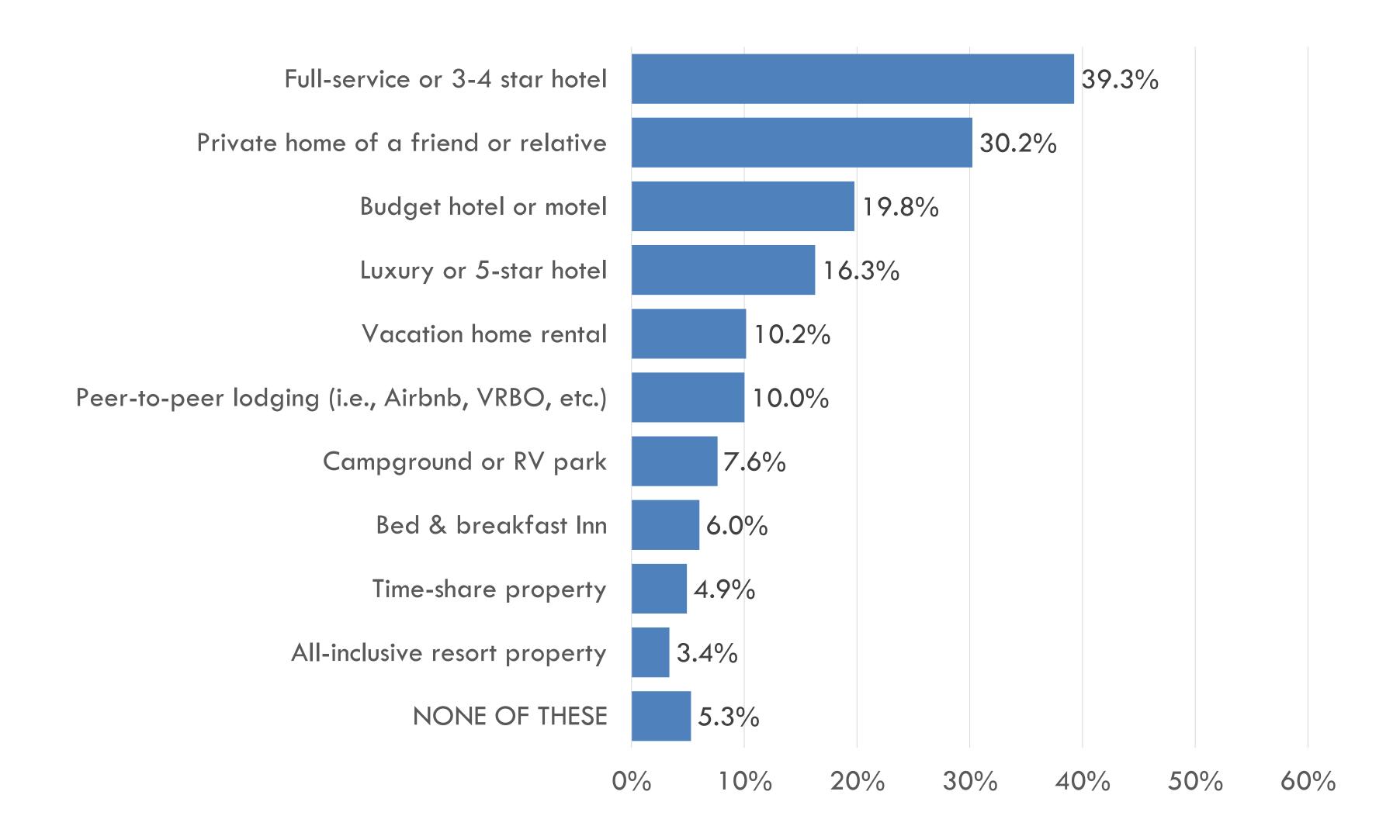
Question: How many of these leisure trips will be REGIONAL TRIPS (travel less than 250 miles from your home)?





# EXPECTED PLACE OF STAY (NEXT 3 MONTHS)

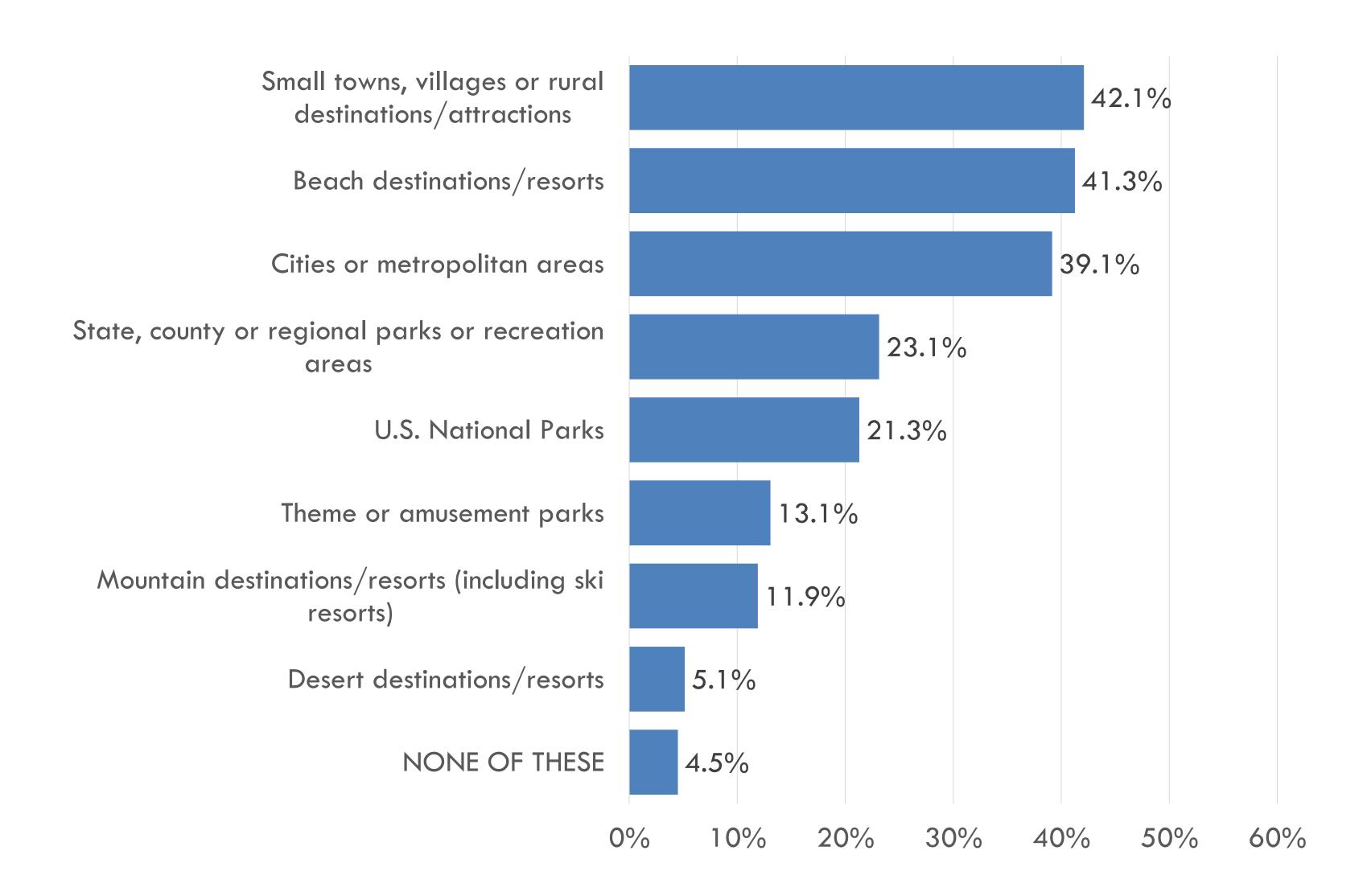
Question: On these leisure trips, in which of the following are you expecting to stay overnight?





# DESTINATION TYPES EXPECTED (NEXT 3 MONTHS)

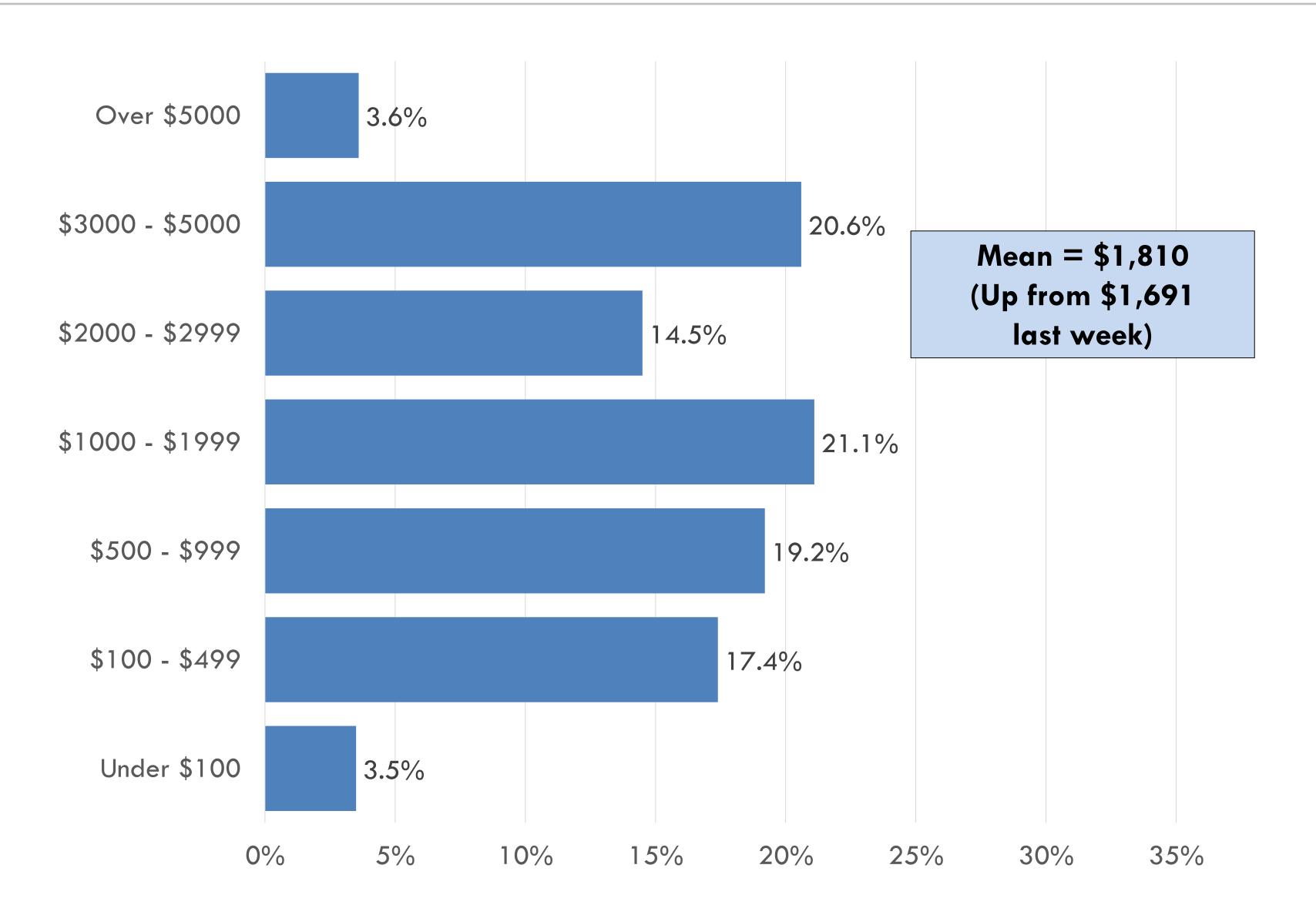
Question: On these leisure trips, which of the following are you expecting to visit?





# 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?

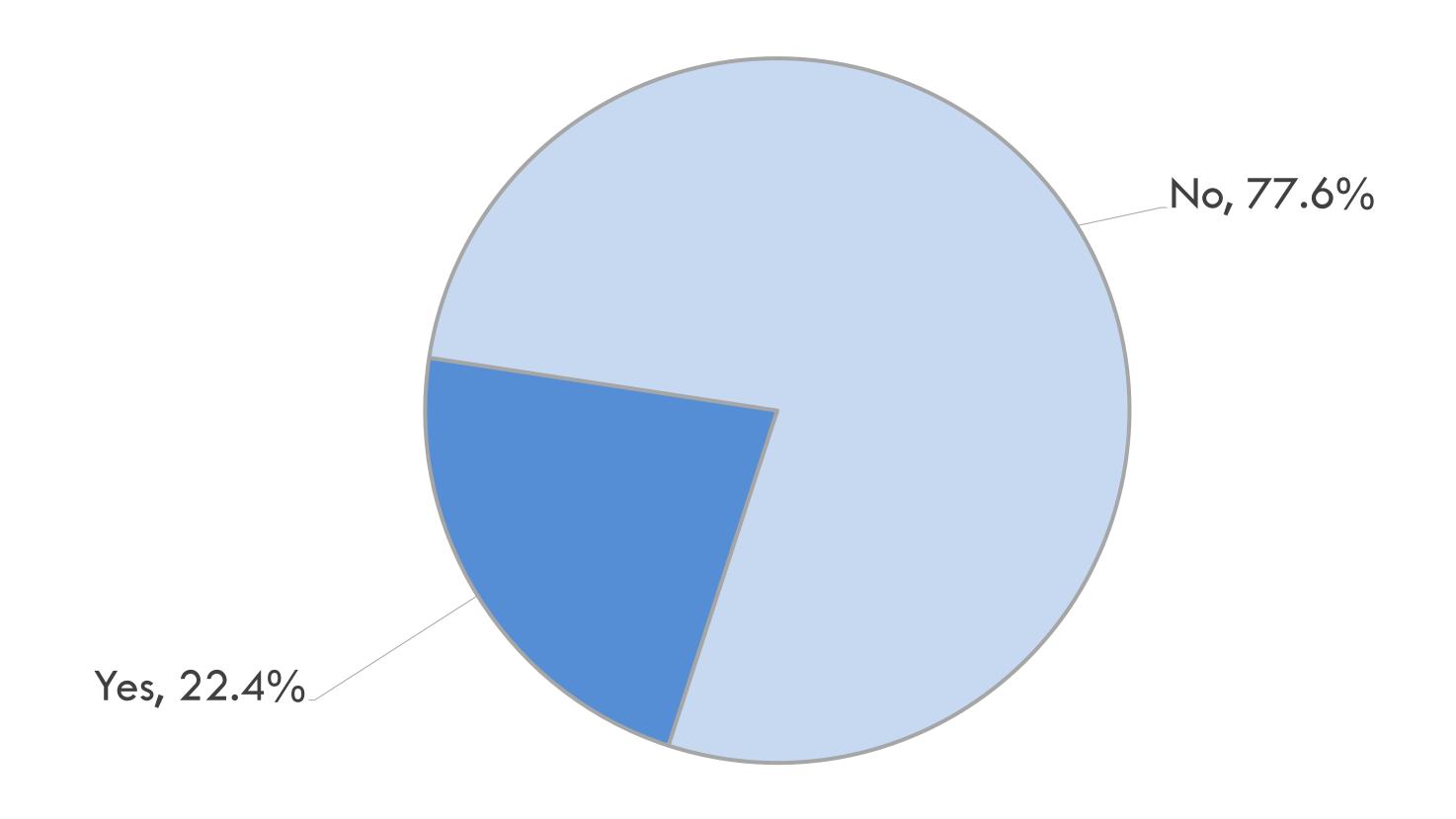






# TRAVEL OVER MEMORIAL DAY HOLIDAY

Question: Did you travel (50-miles or more away from home) over the Memorial Day holiday?

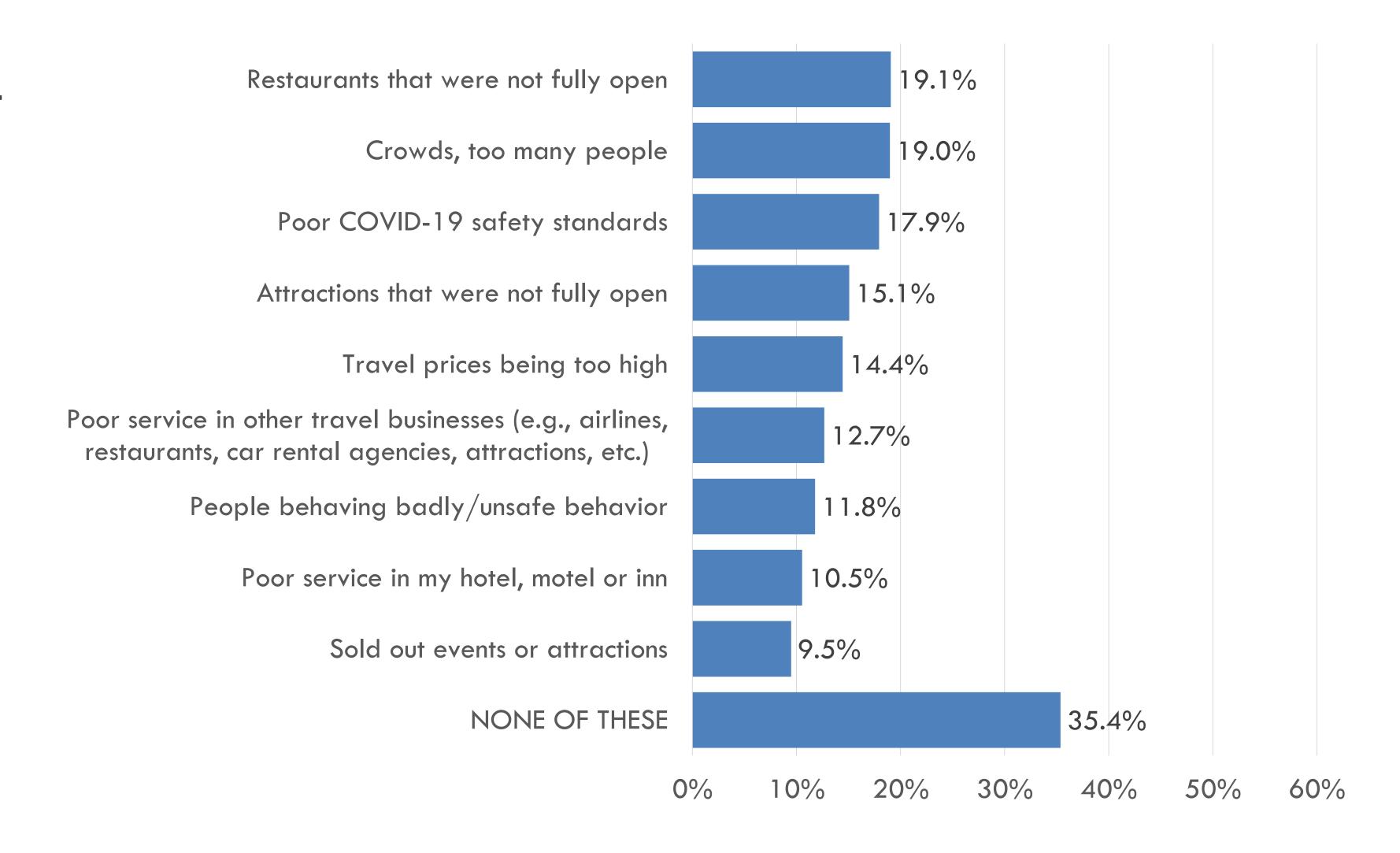




### MEMORIAL DAY DESTINATION EXPERIENCE

Question: Which of the following (if any) did you experience on your Memorial Day trip? (Select all that apply)

(Base: Waves 65 data. Respondents who traveled over the Memorial Day Holiday, 272 completed surveys. Data collected June 2-4, 2021)



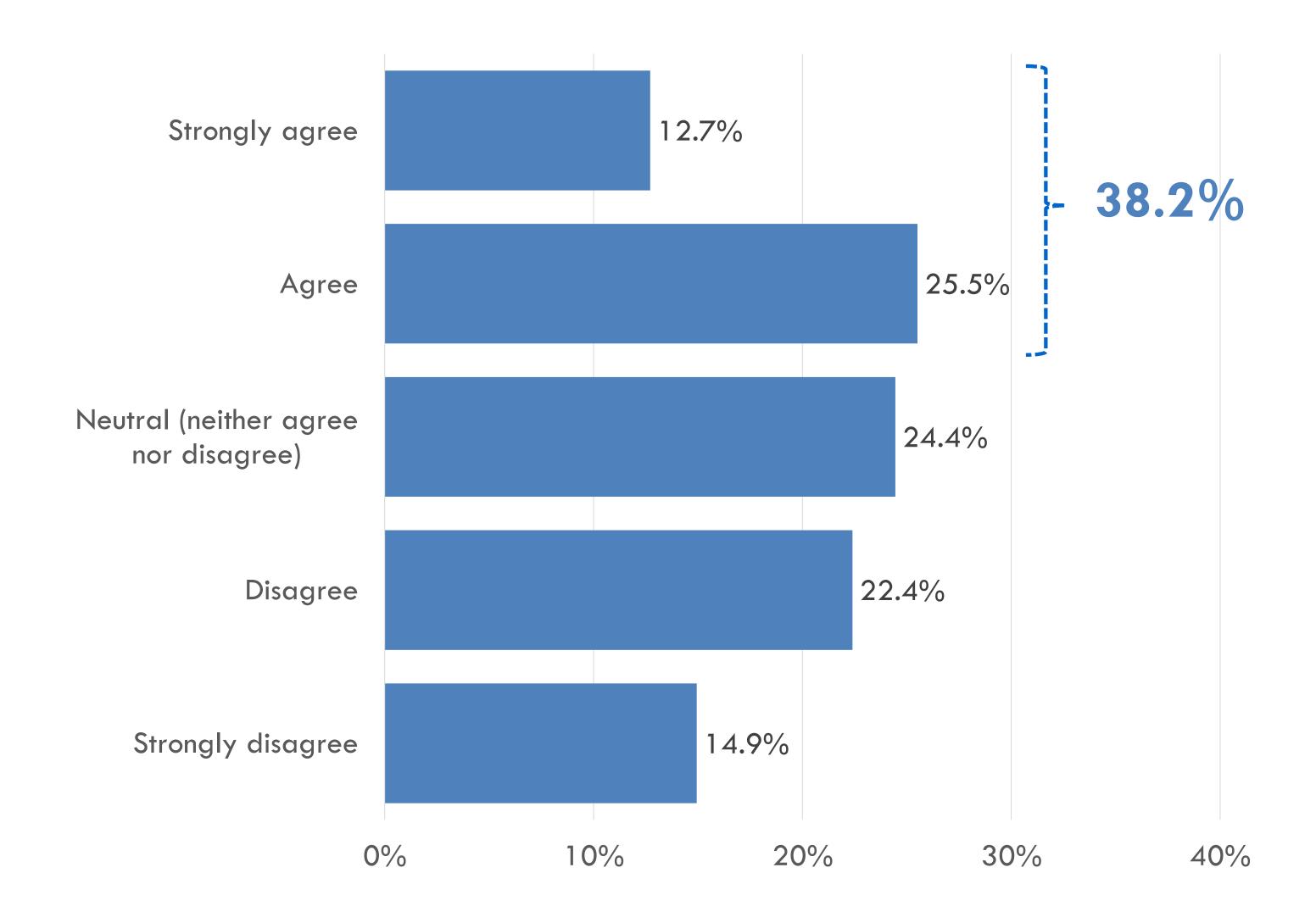


#### IRRITATION OF OTHER TRAVELERS OVER THE MEMORIAL DAY HOLIDAY

Question: How much do you agree or disagree with the following statement?

At times during my Memorial Day trip, I found other travelers to be irritating.

(Base: Waves 65 data. Respondents who traveled over the Memorial Day Holiday, 272 completed surveys. Data collected June 2-4, 2021)



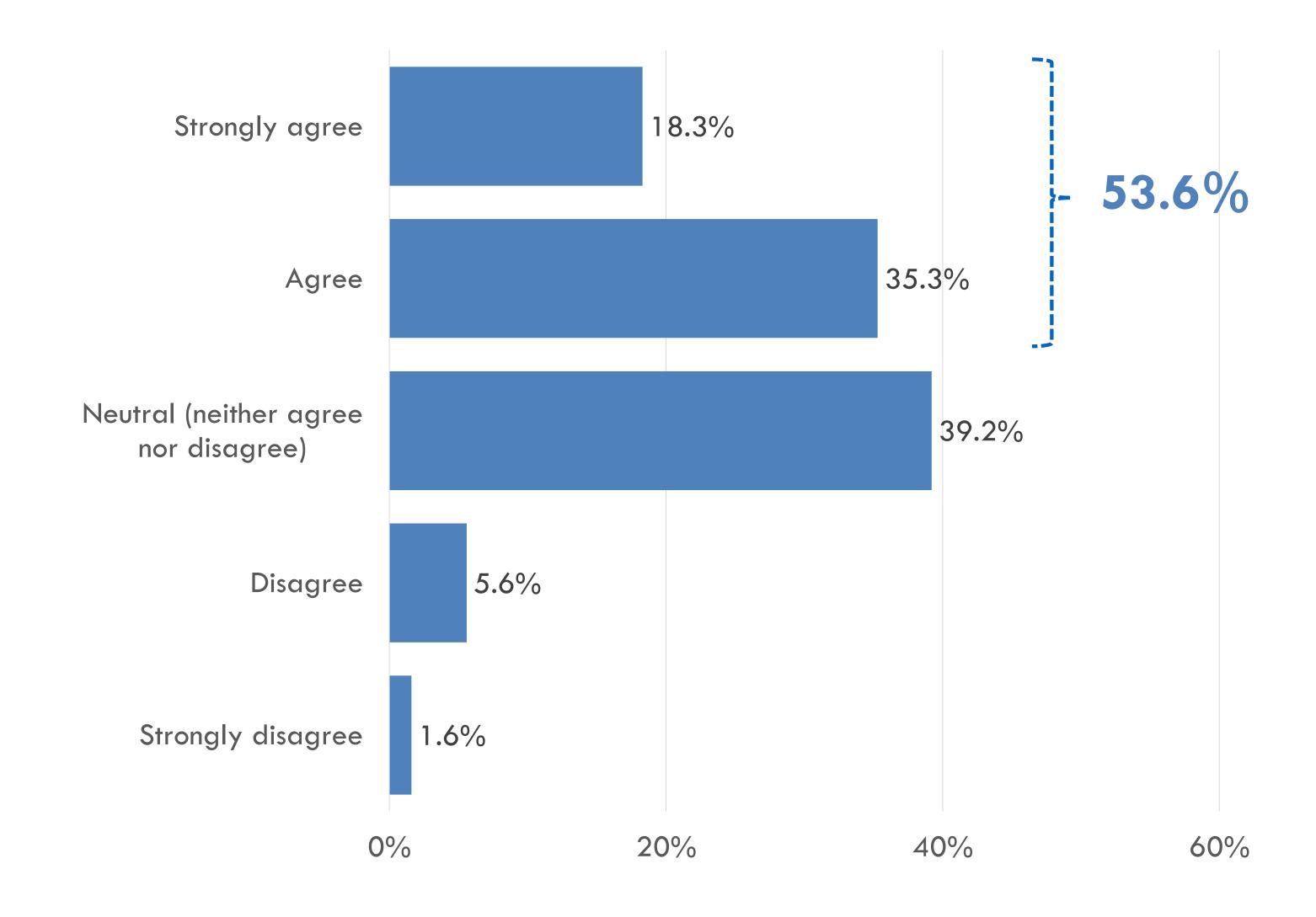


#### COMFORTABILITY IN TRAVEL DUE TO THE MEMORIAL DAY HOLIDAY

Question: How much do you agree or disagree with the following statement?

Traveling over the Memorial Day holiday helped me become more comfortable being out traveling.

(Base: Waves 65 data. Respondents who traveled over the Memorial Day Holiday, 272 completed surveys. Data collected June 2-4, 2021)

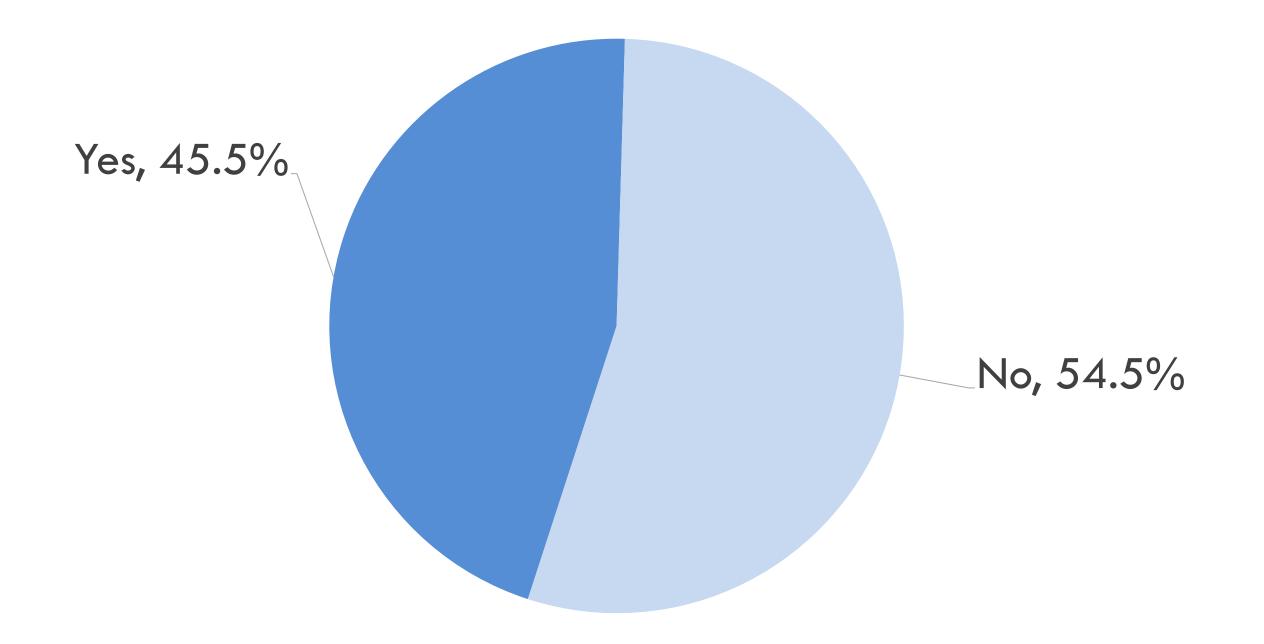






# RECALL OF TRAVEL ADVERTISEMENTS: PAST MONTH

Question: Do you recall seeing any specific advertisements for any travel destinations in the past month?

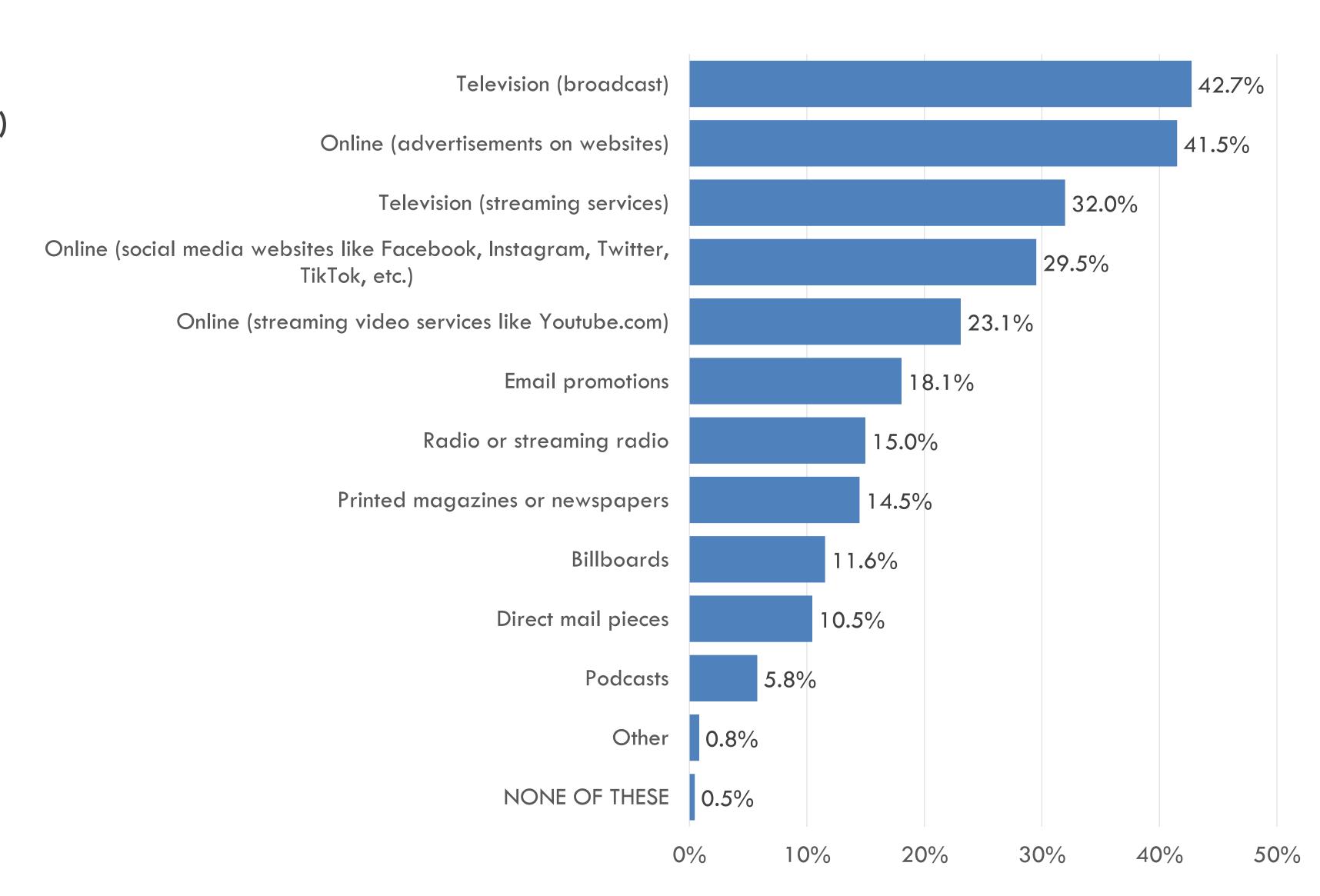




### RECALL OF TRAVEL ADVERTISEMENTS: BY MEDIA

Question: In the past month, where did you see or hear advertisement(s) for travel destinations? (Select all that apply)

(Base: Wave 65 data. Respondents who saw advertising in the past month, 547 completed surveys. Data collected June 2-4, 2021)

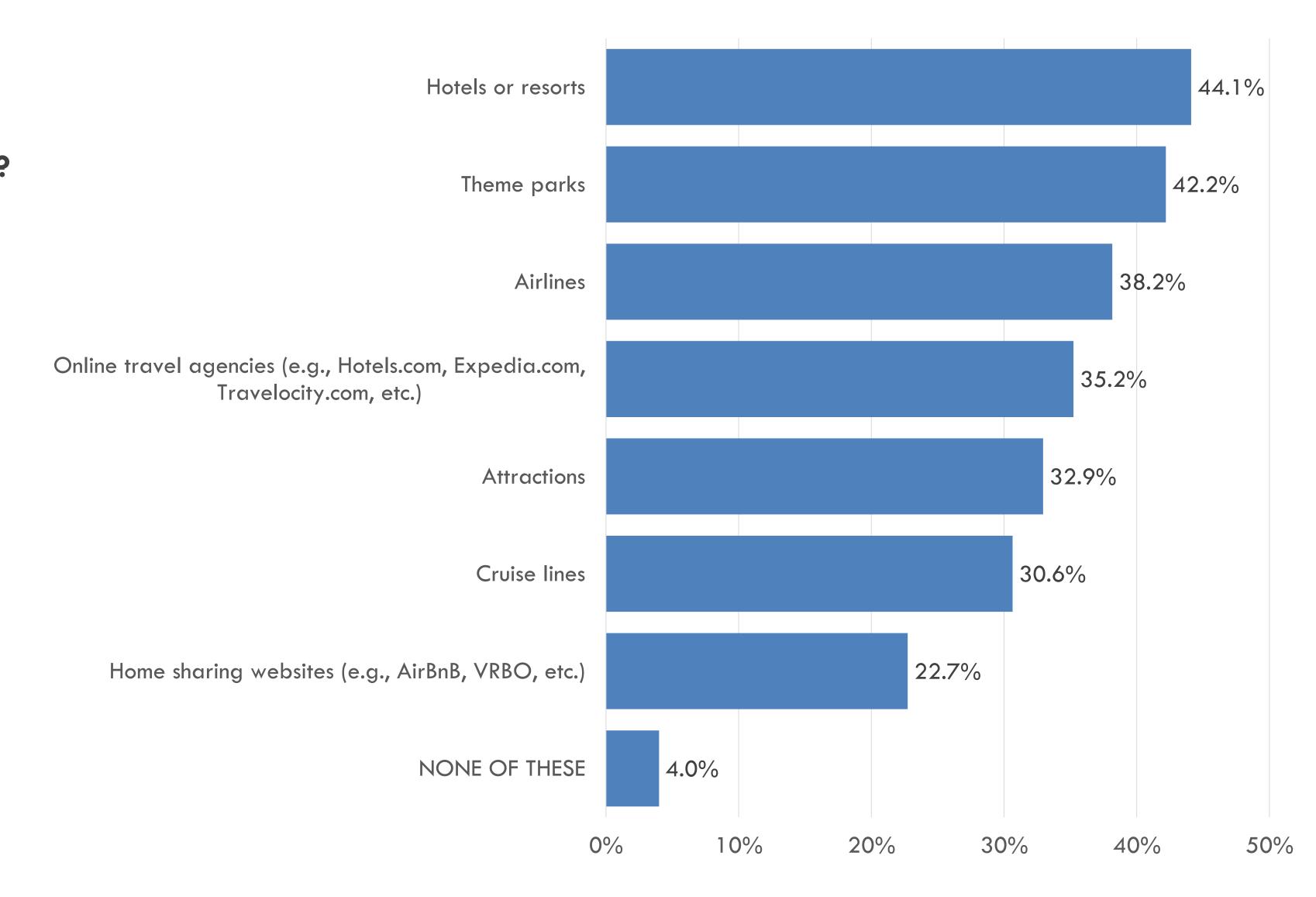




### RECALL OF TRAVEL ADVERTISEMENTS: BY TYPE

Question: Which (if any) of these types of travel advertisements do you recall seeing in the past month?

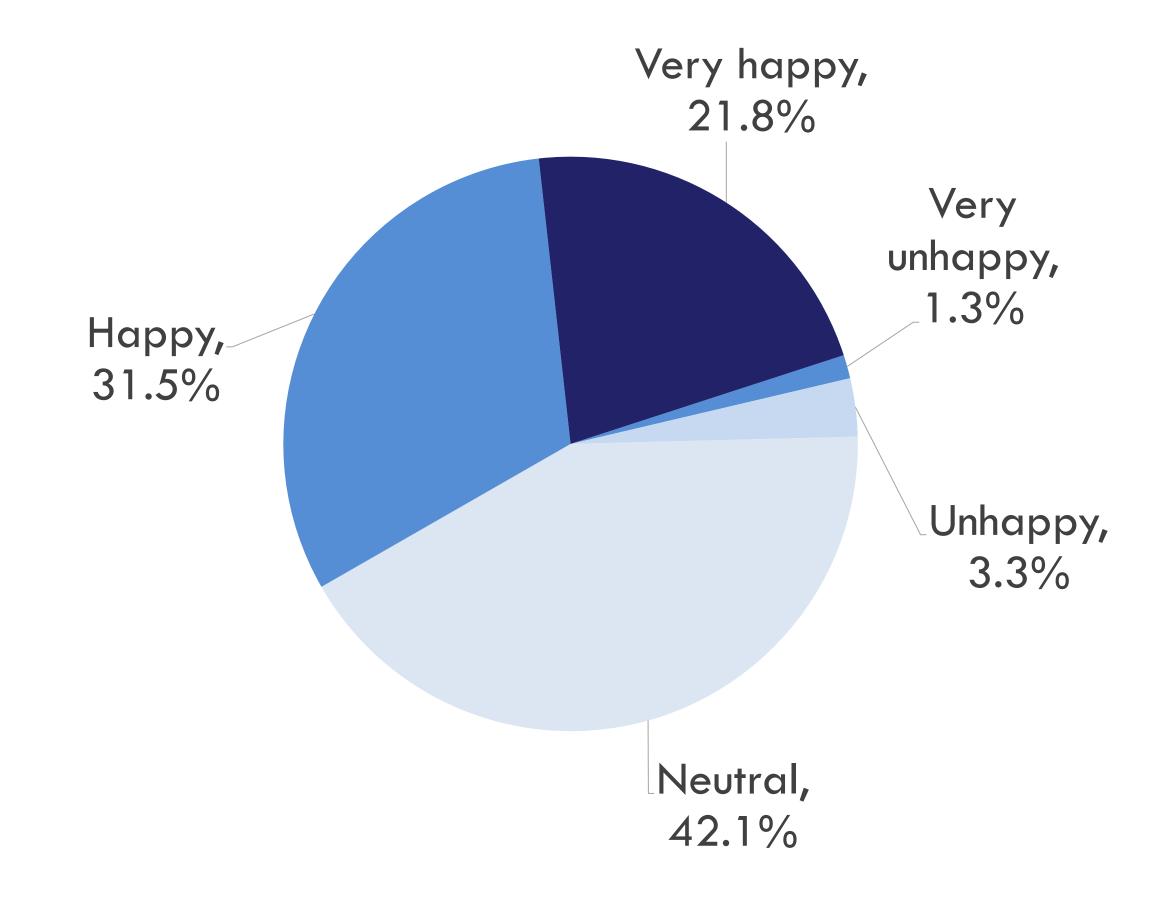
(Base: Wave 65 data. Respondents who saw advertising in the past month, 547 completed surveys. Data collected June 2-4, 2021)





#### HAPPINESS ABOUT SEEING TRAVEL ADVERTISEMENTS

Question: Please think about the most recent travel destination advertisement you saw. In general, how did that advertisement make you feel?

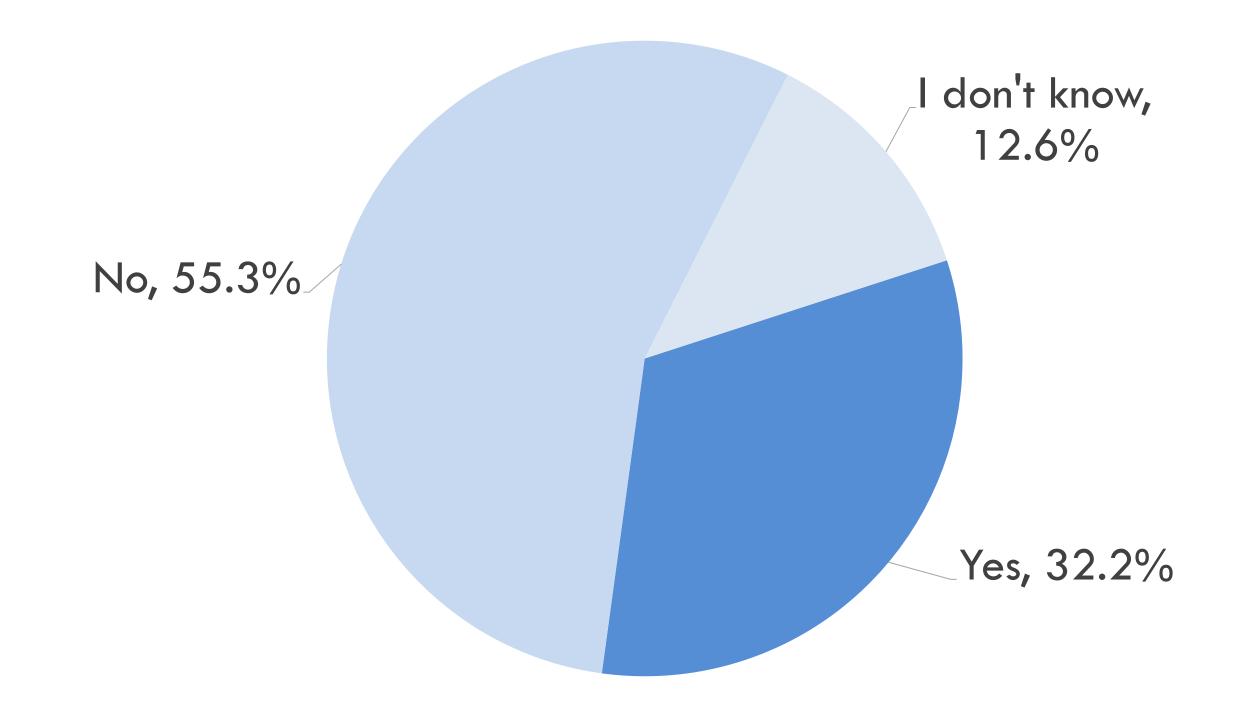




#### INFLUENCE OF ADVERTISEMENTS ON DESTINATION SELECTION

Question: Have you ever decided to visit a destination as a result of having seen an advertisement for

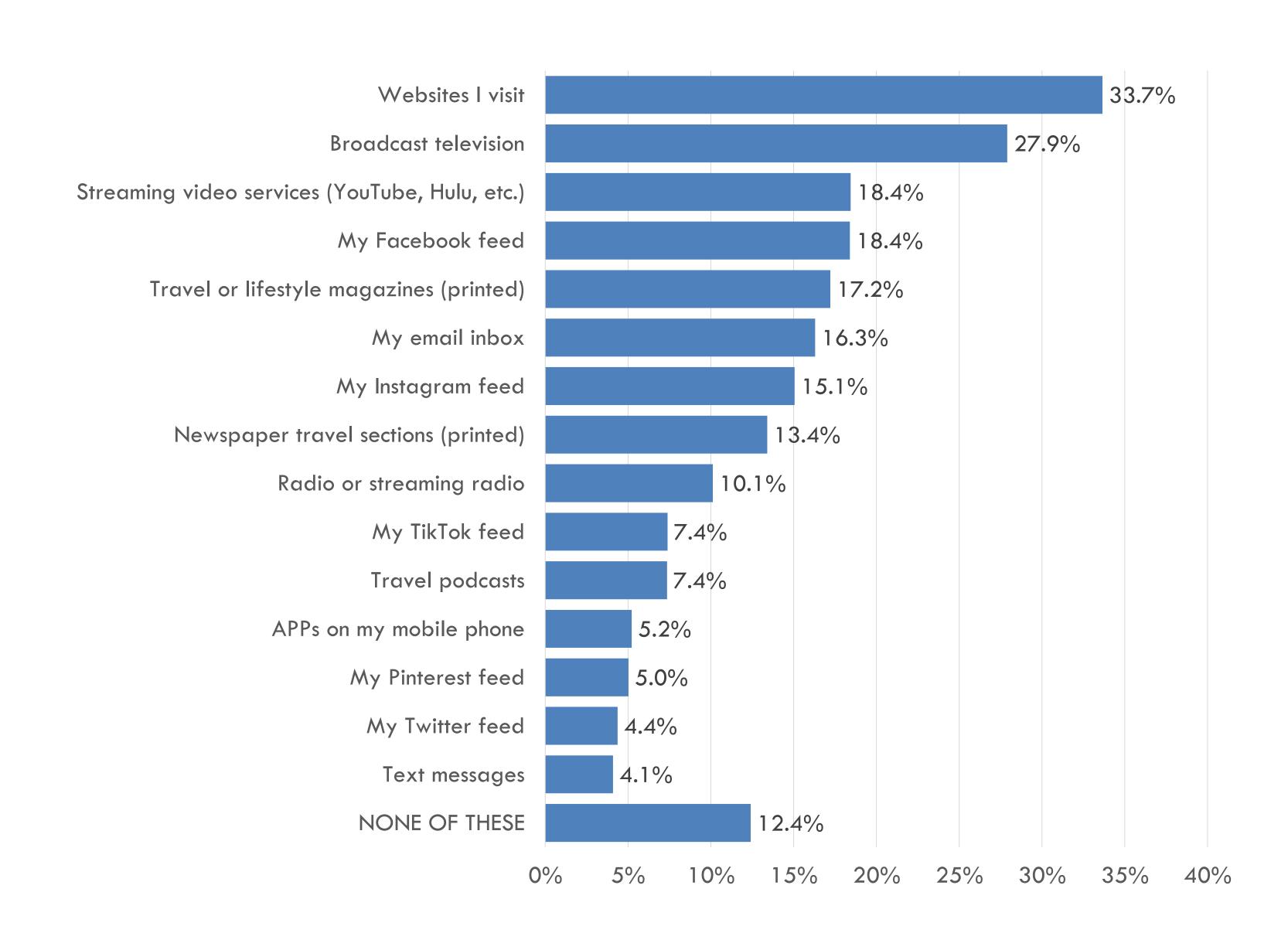
that destination?





#### TRAVEL ADVERTISEMENTS: MOST RECEPTIVE CHANNELS

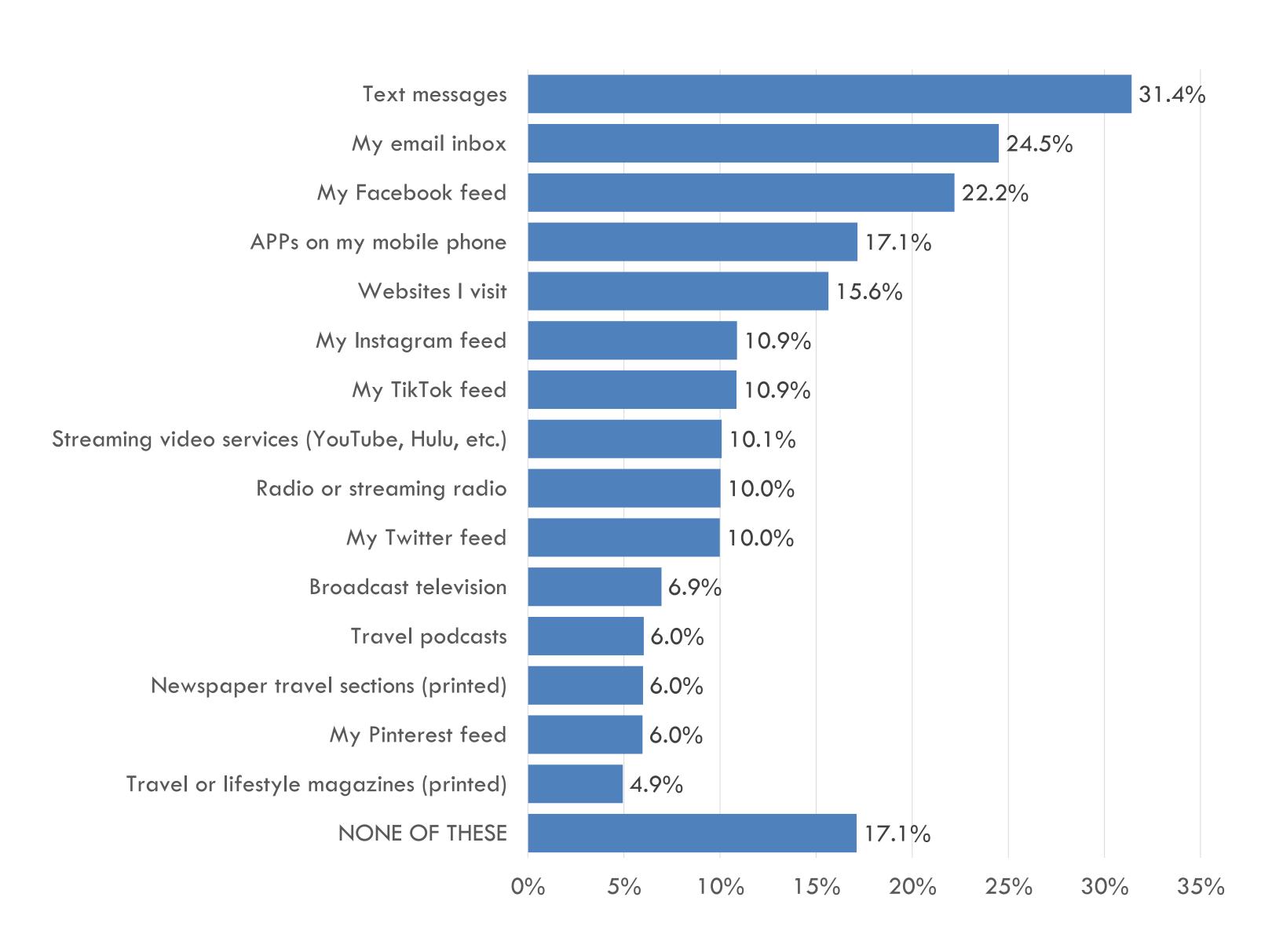
Question: Please think about where (if anywhere) you would be open to seeing travel advertisements. In general, where would you be MOST RECEPTIVE to advertisements for travel destinations? (Select the THREE PLACES where you would generally be most receptive)





#### TRAVEL ADVERTISEMENTS: LEAST RECEPTIVE CHANNELS

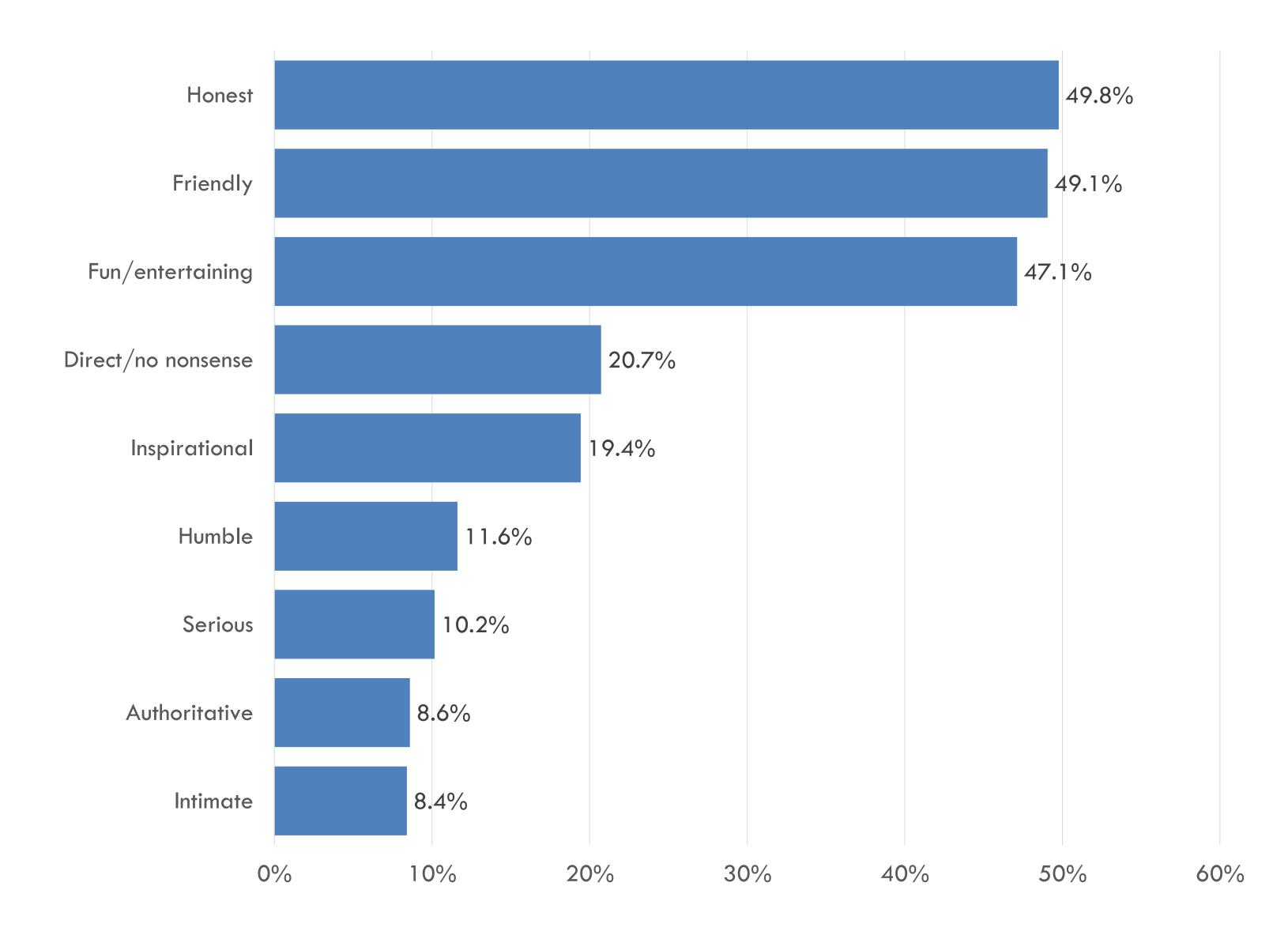
Question: Please think about where
YOU WOULD NOT WANT TO SEE
travel advertisements. In general,
where would you be LEAST
RECEPTIVE to advertisements for
travel destinations? (Select the
THREE PLACES where you would
generally be least receptive)





#### DESIRED TONES IN TRAVEL ADVERTISEMENTS

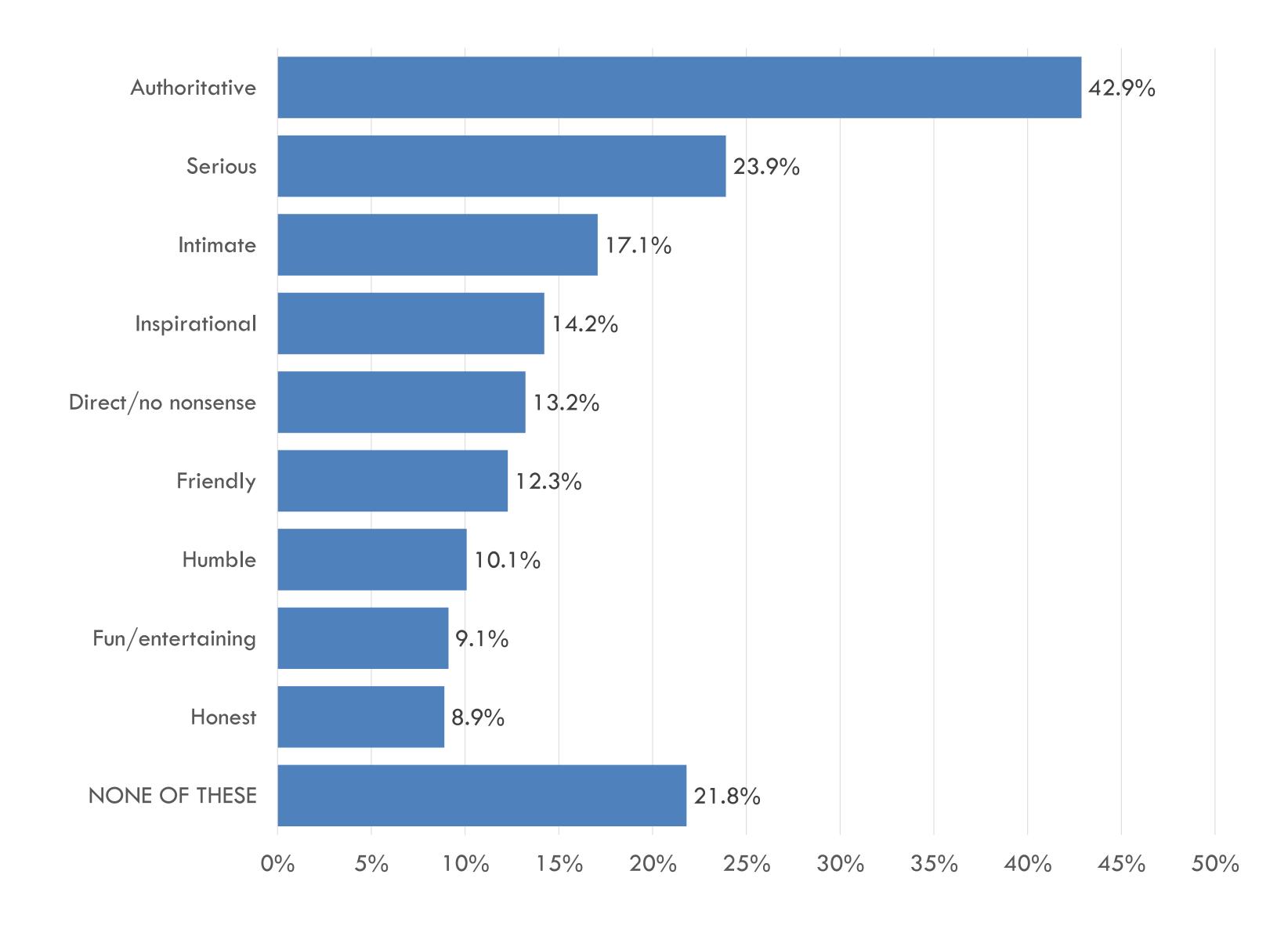
Question: Think about advertisements for travel destinations. How would you like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now?





#### TONES IN TRAVEL ADVERTISEMENTS: TURNOFFS

Question: Would any of these tones
(if used by a travel destination) turn
you off? (Select any that apply)



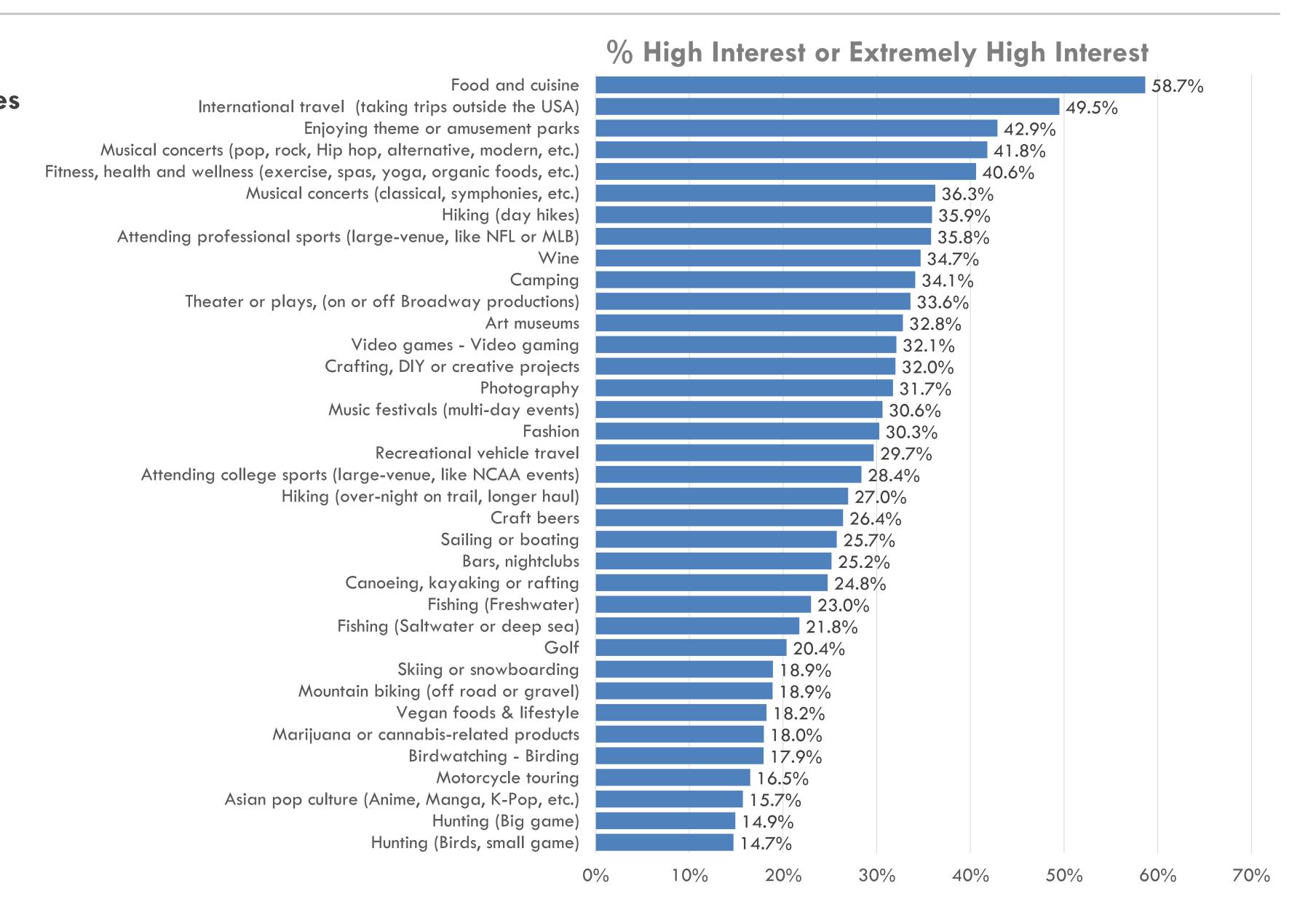


# LOOKING AHEAD: TRAVEL PASSIONS & DESIRES



#### TRAVEL PASSIONS & HOBBIES

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

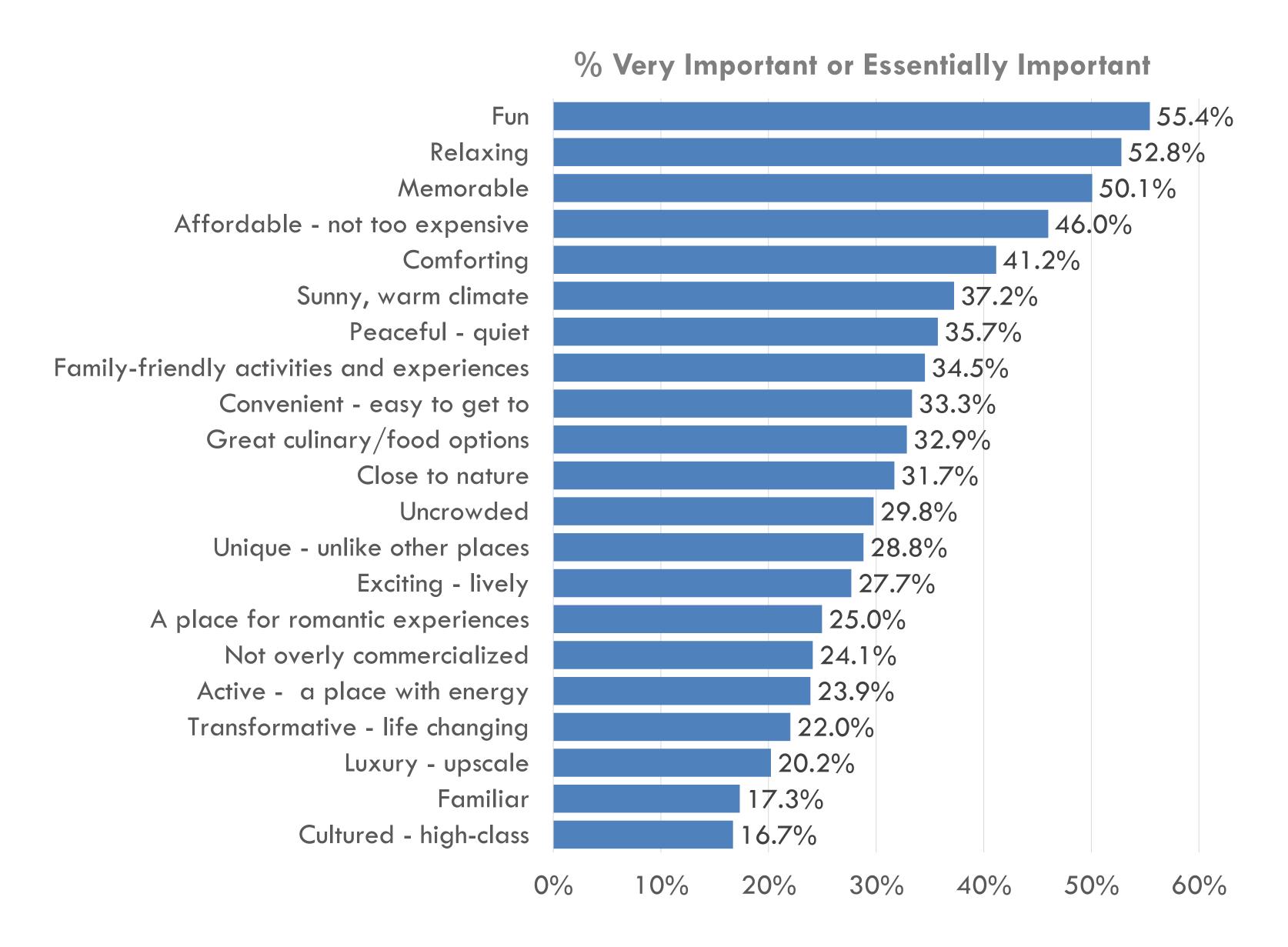




#### DESIRED DESTINATION ATTRIBUTES (NEXT 12 MONTHS)

Question: Think about the types of destinations you would most like to visit in the NEXT TWELVE (12)

MONTHS. Please tell us how you want the places you visit to be. How important is each attribute?

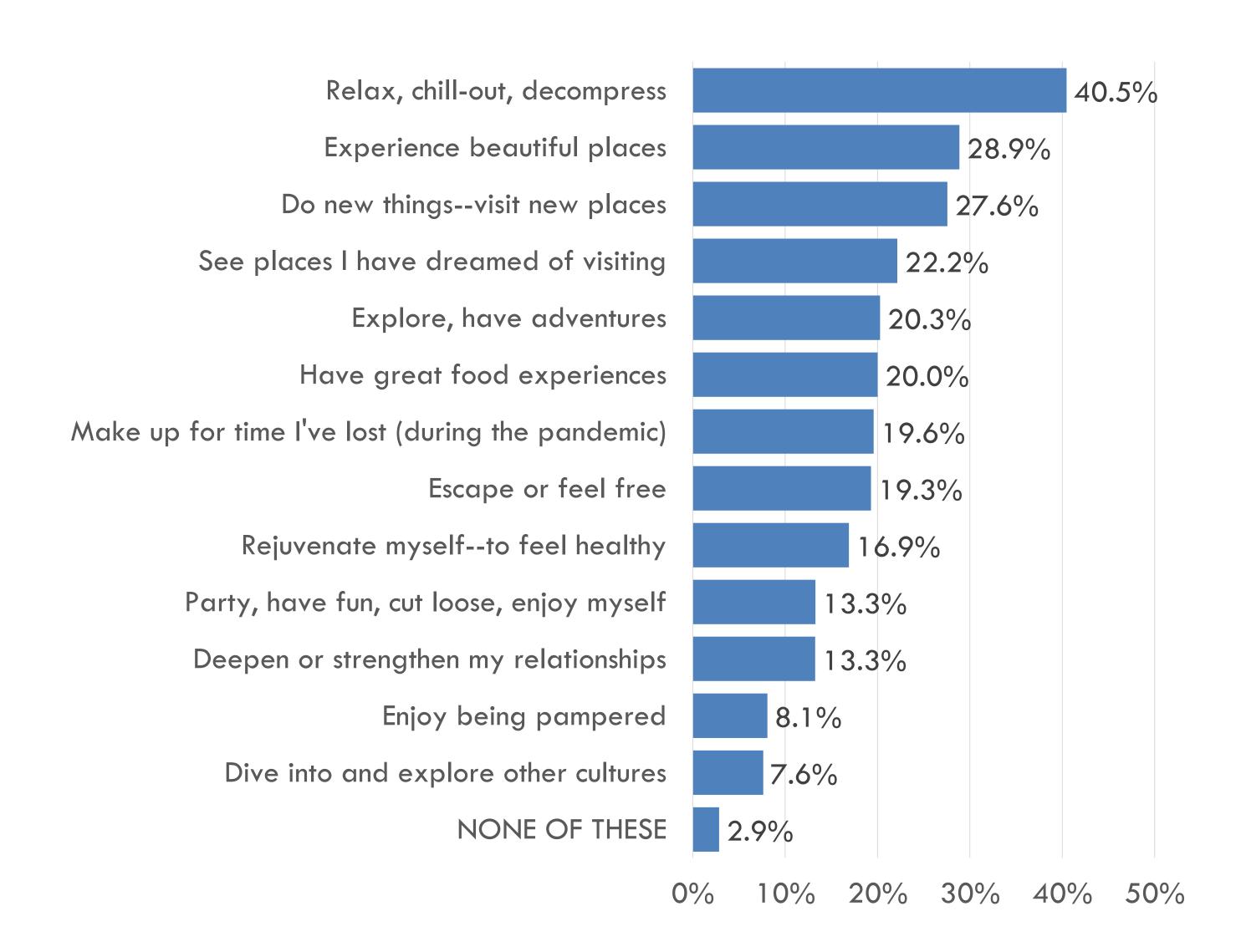




#### TRAVEL DESIRES FOR THE COMING YEAR

Question: Think about yourself as a traveler this coming year. What do you MOST WANT TO GET OUT OF YOUR TRAVELS? (Select as many as 3 that complete the sentence)

This year I most want to \_\_\_\_\_ while traveling.



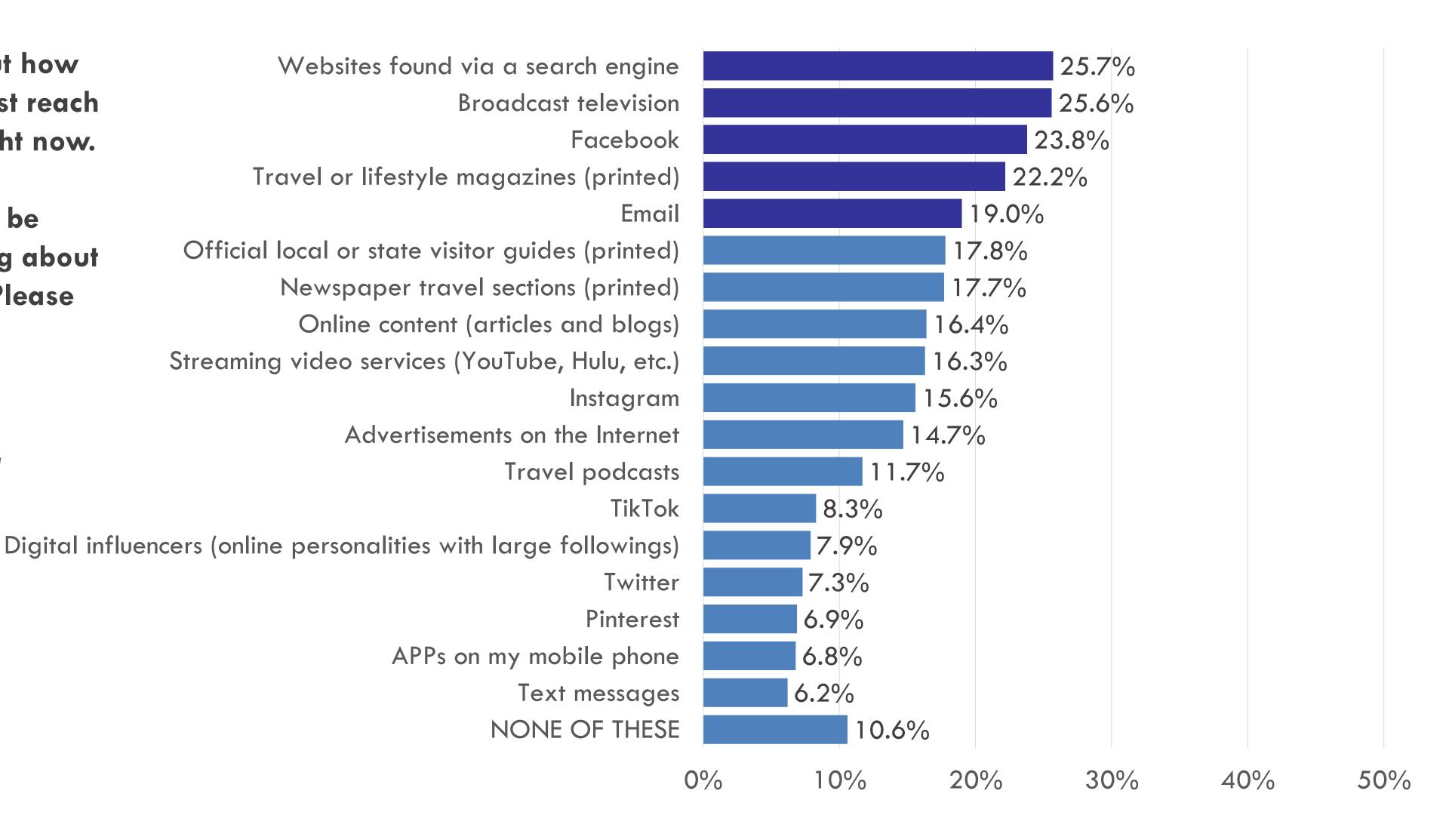




#### RECEPTIVITY TO DESTINATION PROMOTION BY CHANNEL

Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

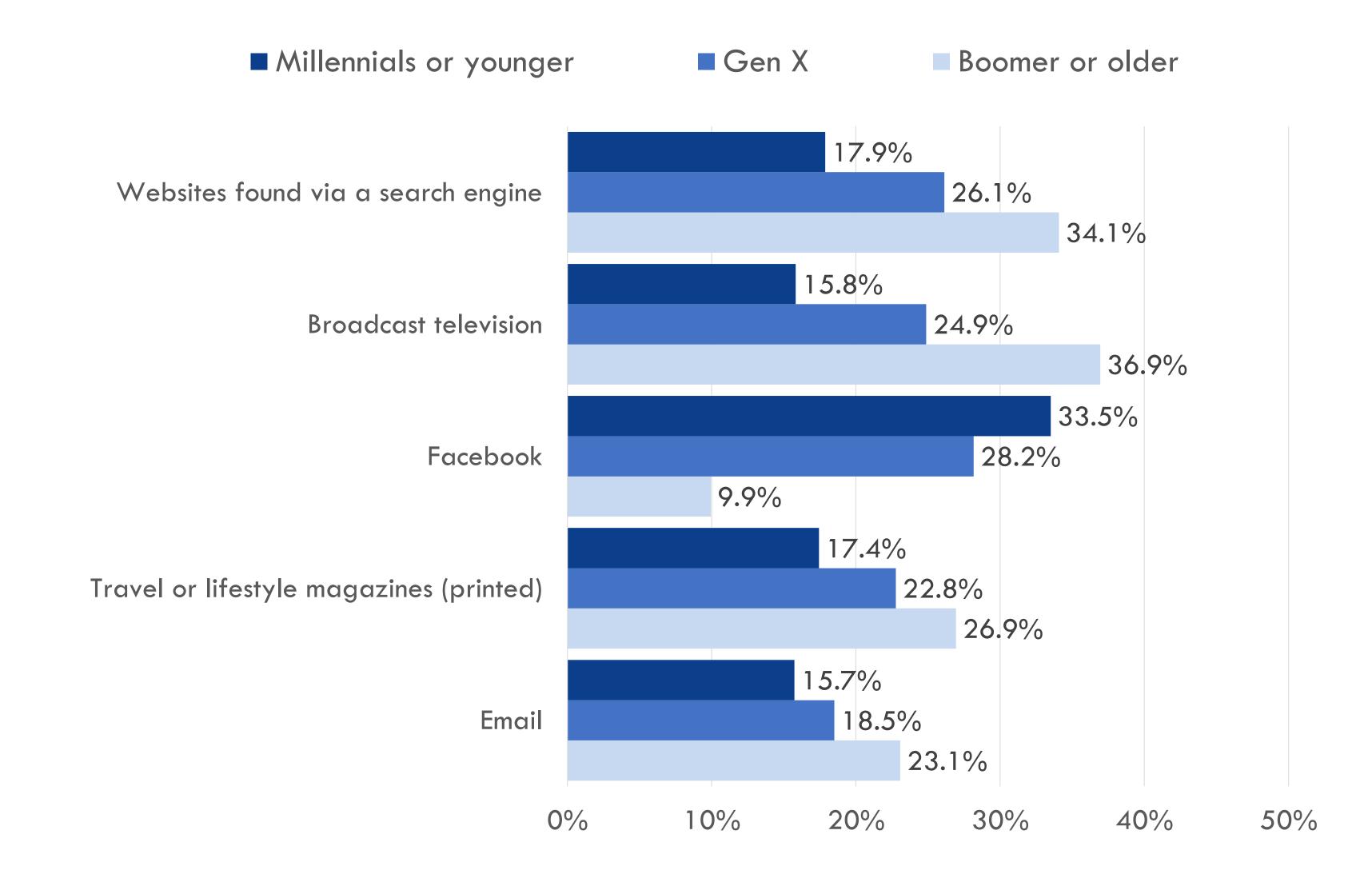




### RECEPTIVITY TO DESTINATION PROMOTION BY TOP 5 CHANNELS: BY GENERATION

Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



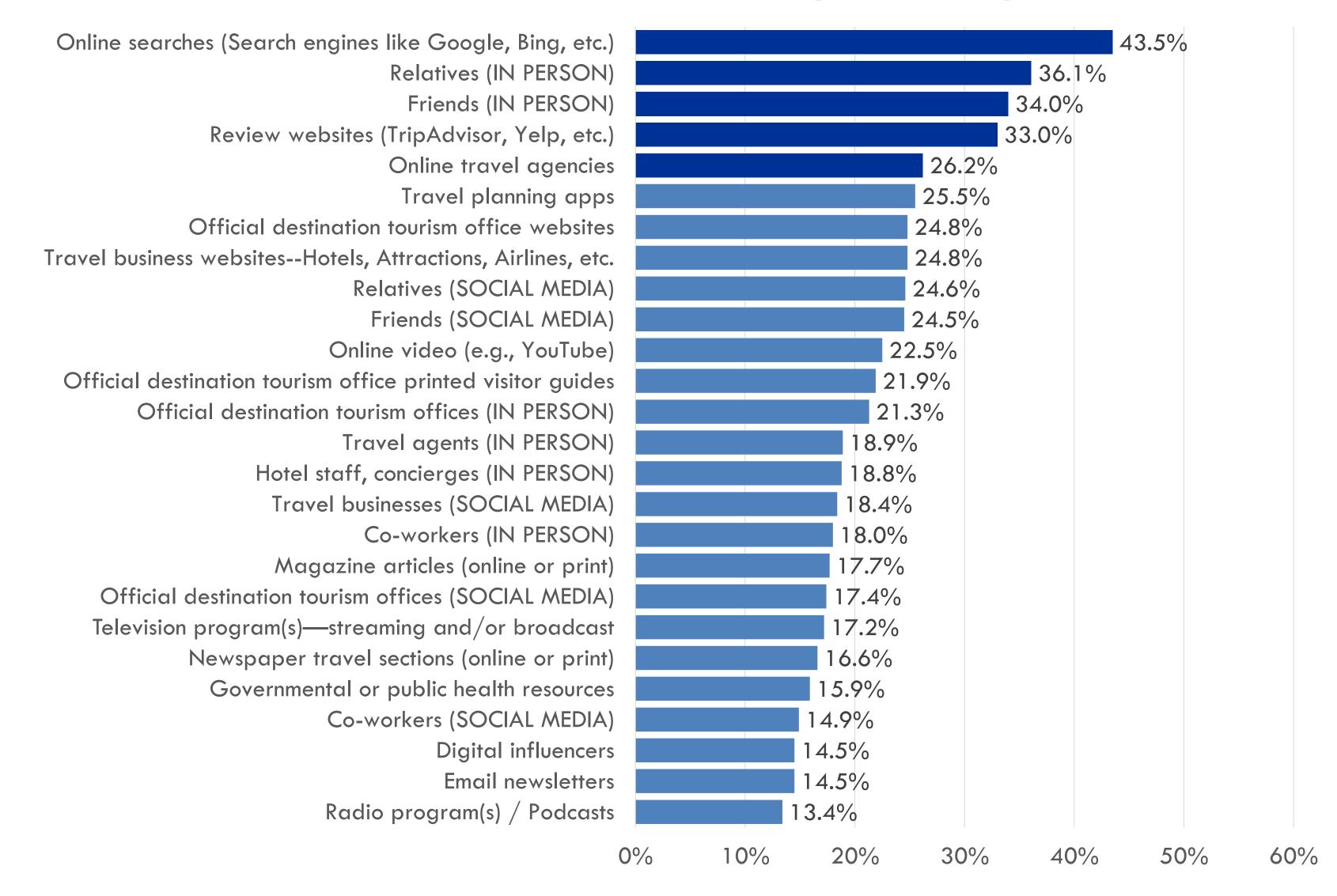


#### TRAVEL PLANNING RESOURCES FREQUENTLY USED

## Question: How frequently do you generally use the following to help plan your leisure trips?

(Base: Wave 65 data. All respondents, 1,217 completed surveys. Data collected June 2-4, 2021)

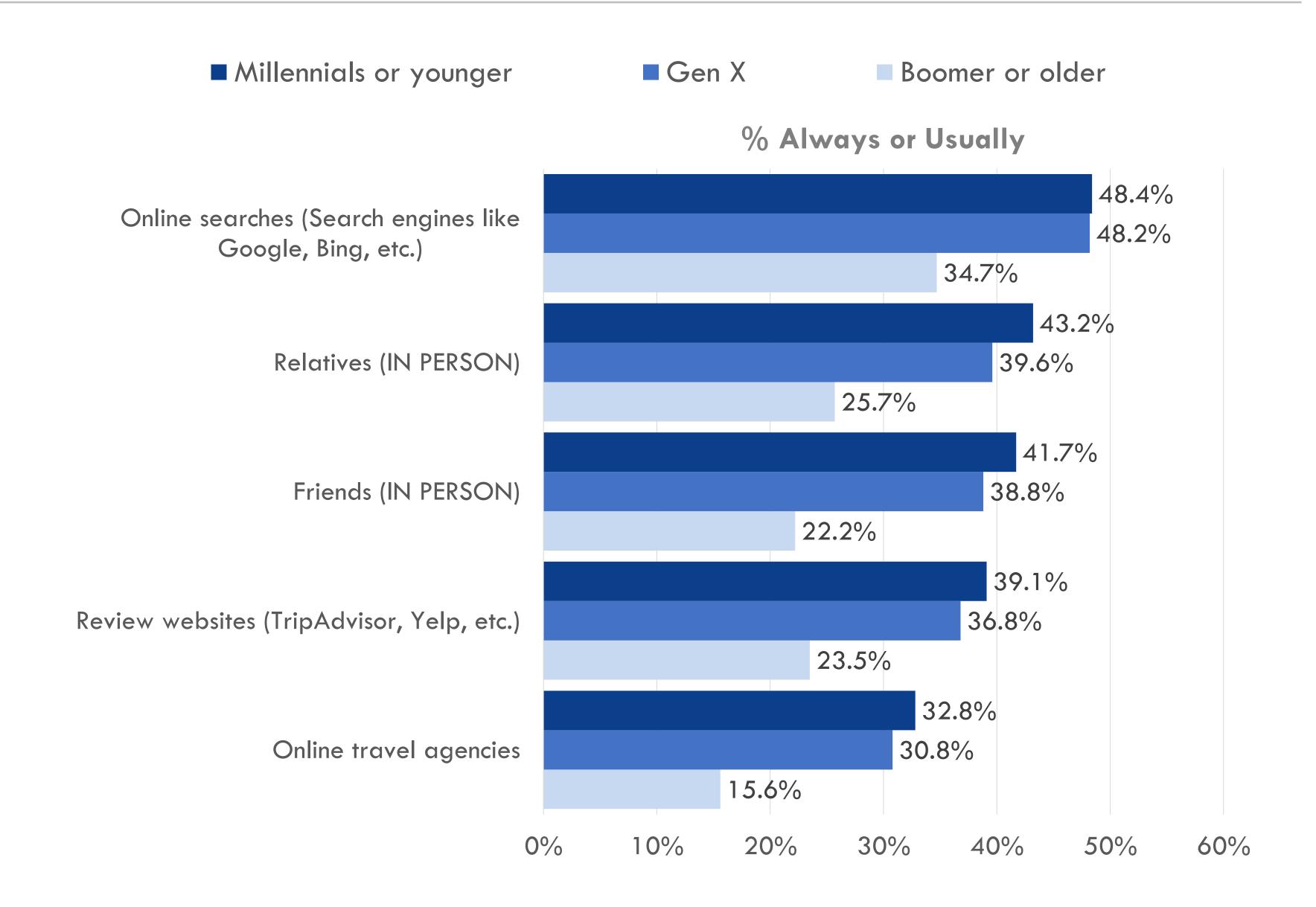
#### % Always or Usually





#### TOP 5 TRAVEL PLANNING RESOURCES FREQUENTLY USED: BY GENERATION

Question: How frequently do you generally use the following to help plan your leisure trips?





# Coronavirus Travel Sentiment Index Measuring the Potential Influence of Travel Marketing Highlights from the Week of June 7th

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1 1 0 1 1 1 1 0 0 1 1 0 1 0 1 0 0 0 1 7

20110001001101000110

1001101010001101



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

## What is a Predictive Index?



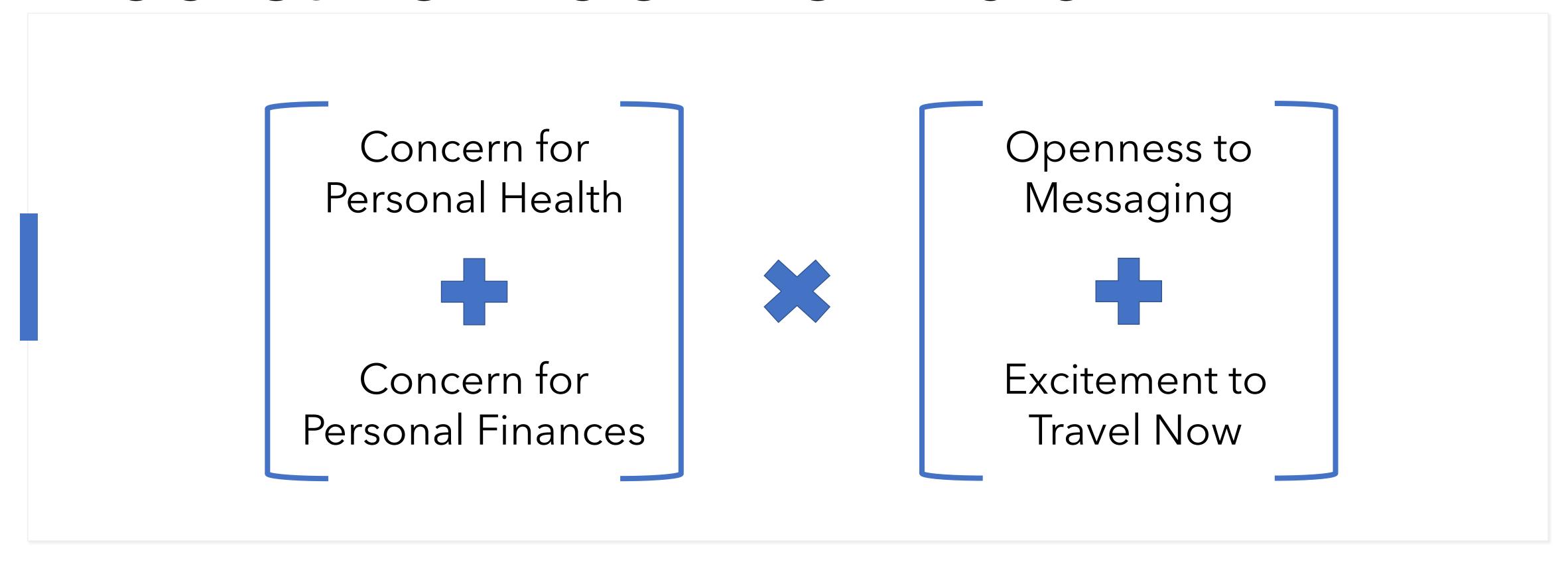
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

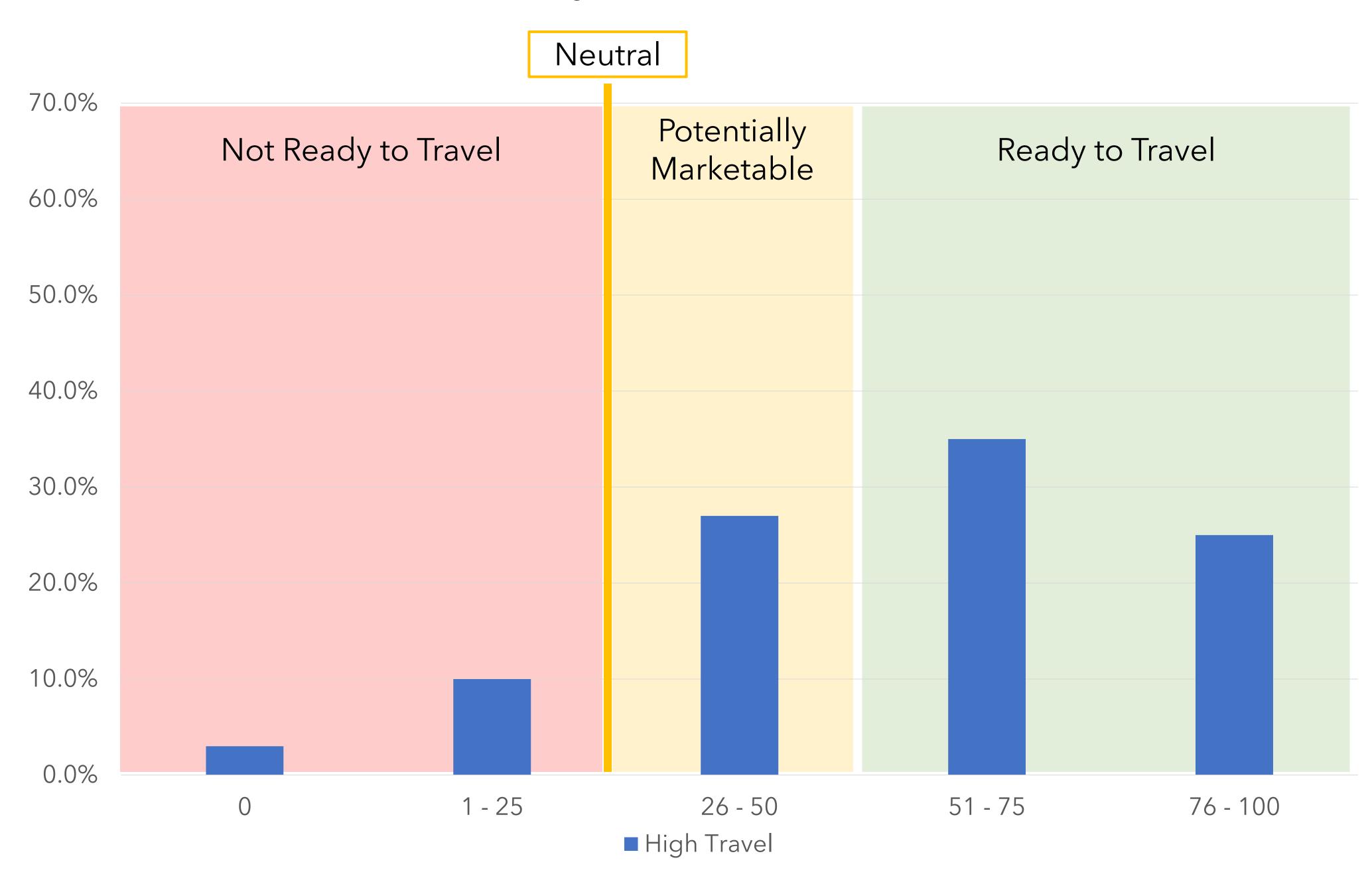
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

### Predictive Index Formula

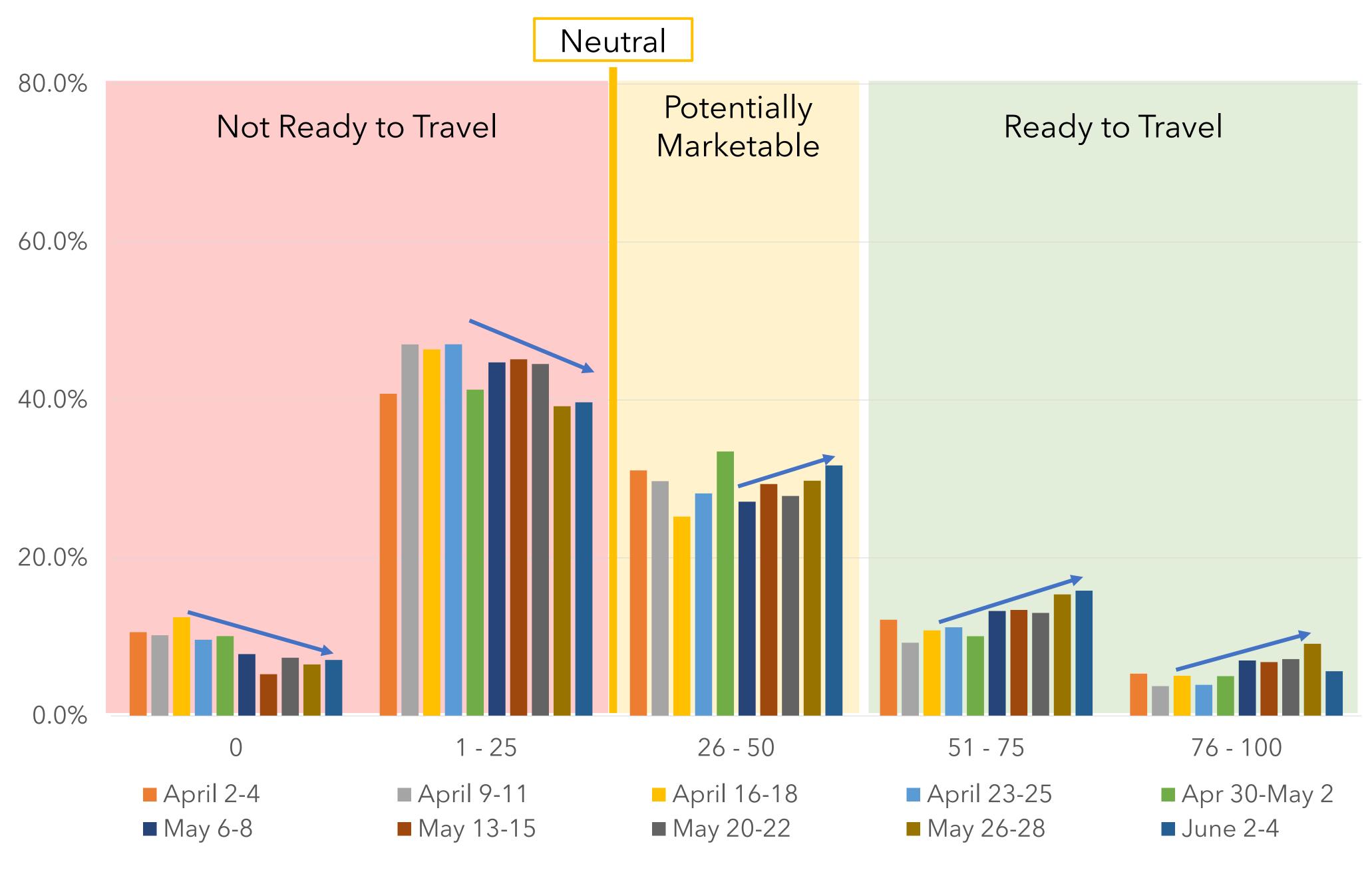


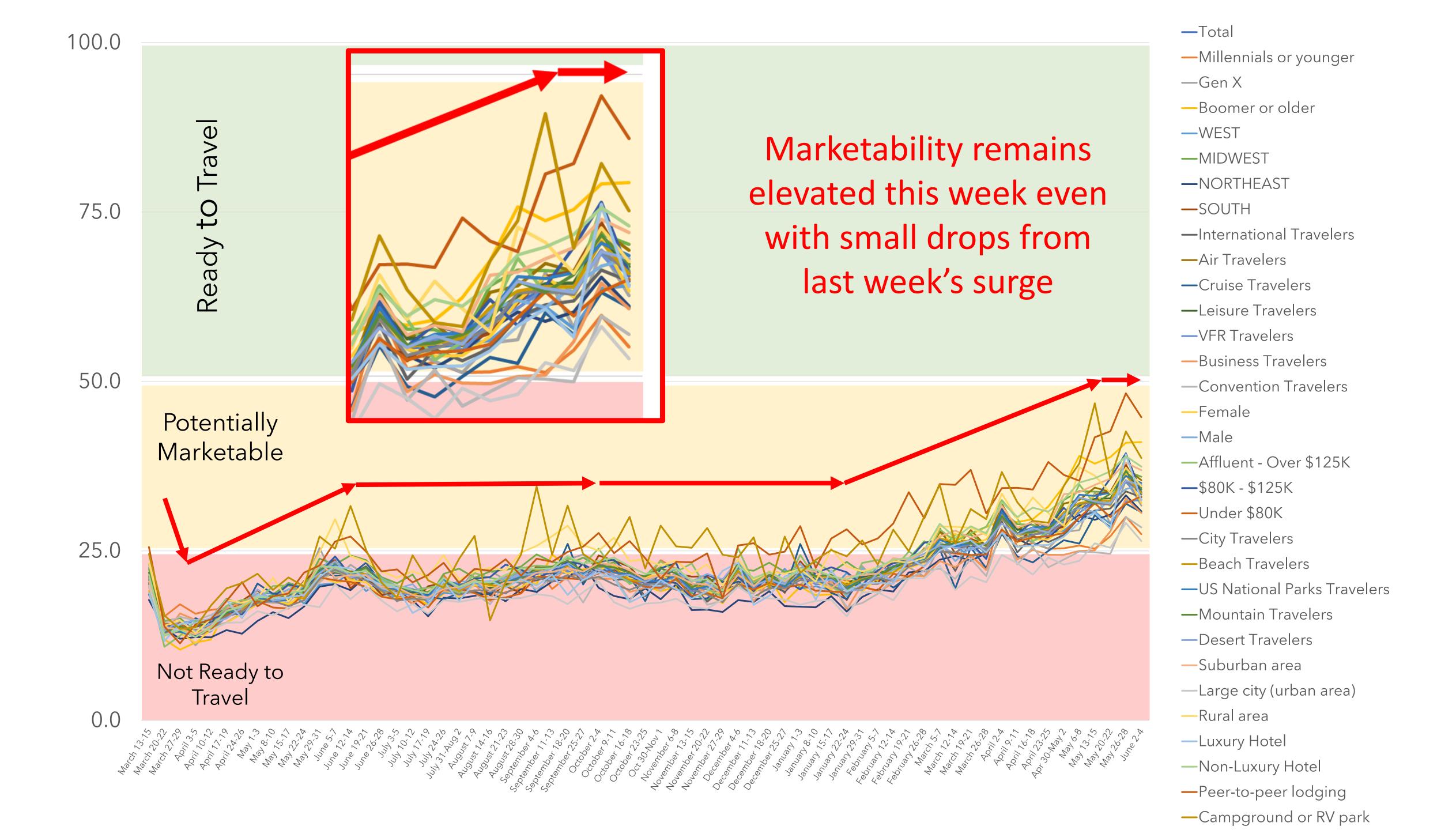
\*Normalized to a 100pt scale

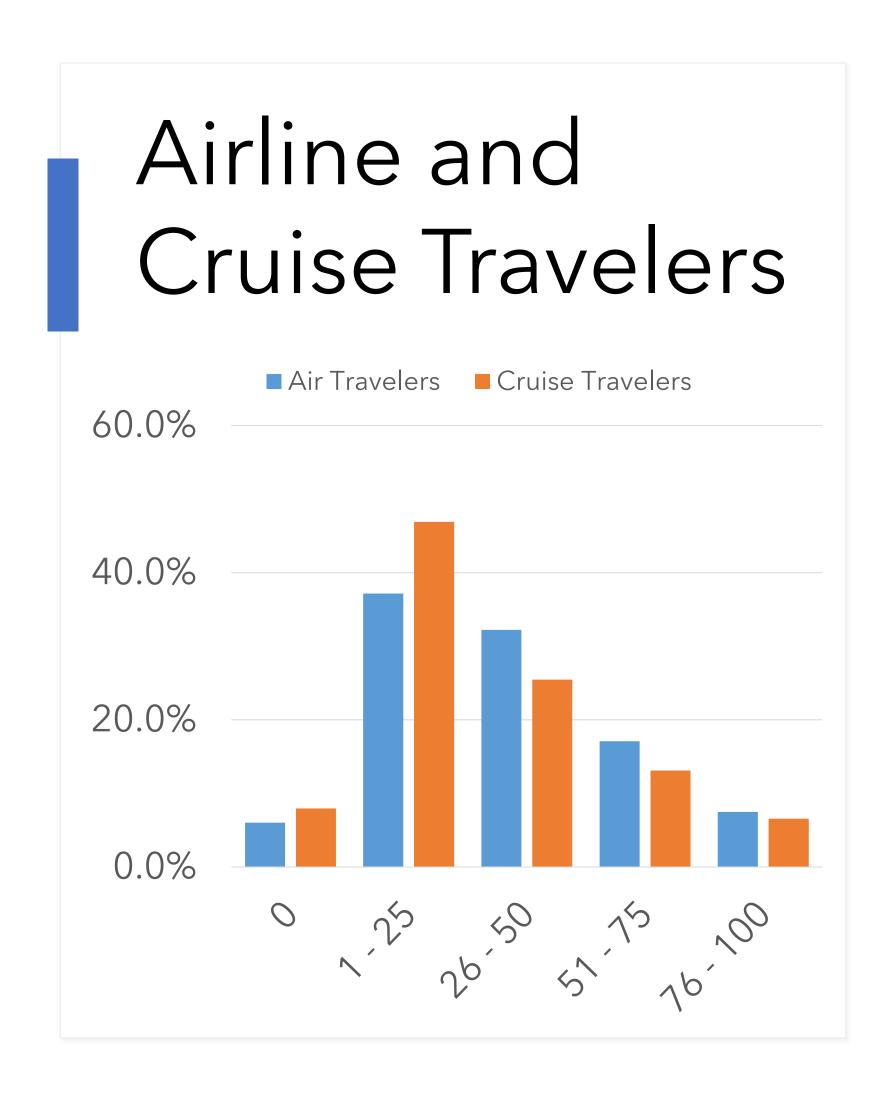
#### **Healthy Travel Outlook**

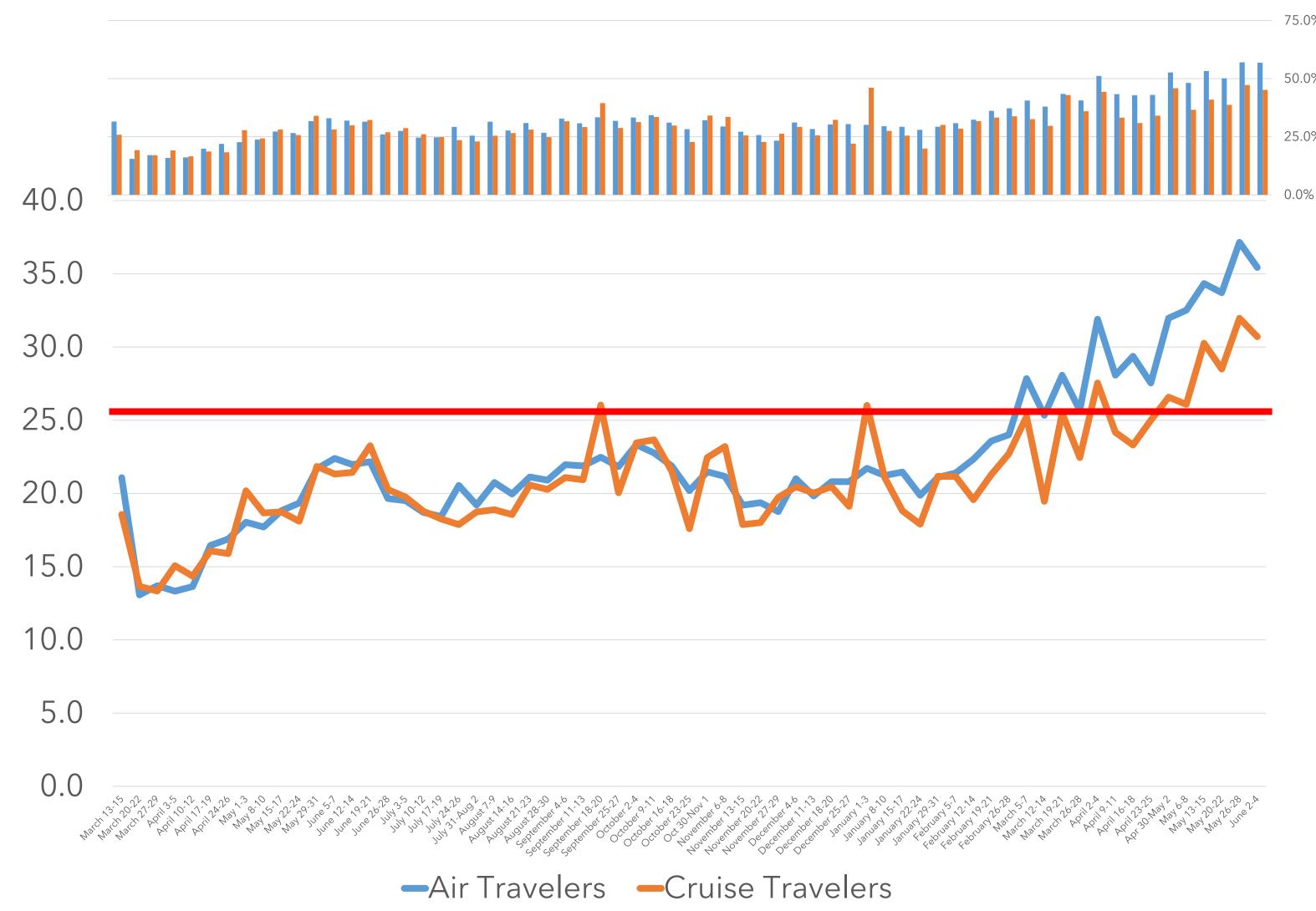


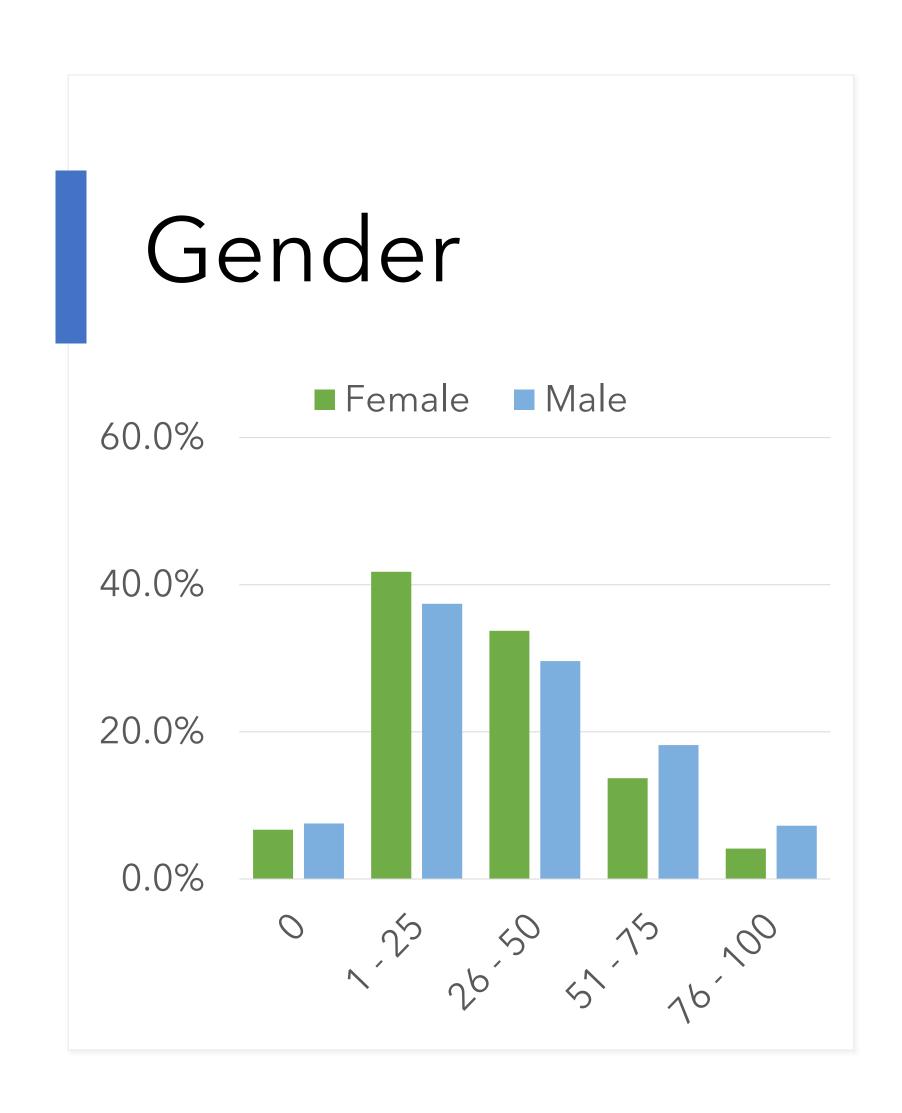
#### **Travel Outlook**



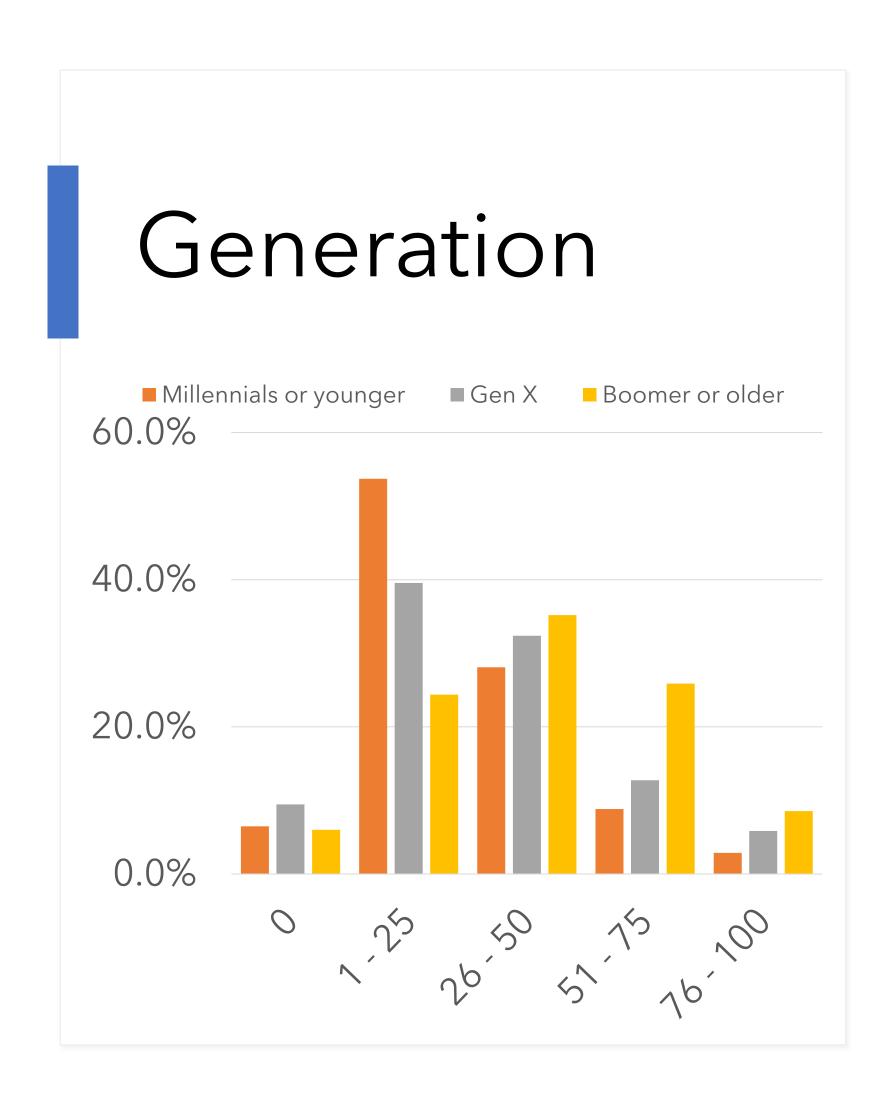


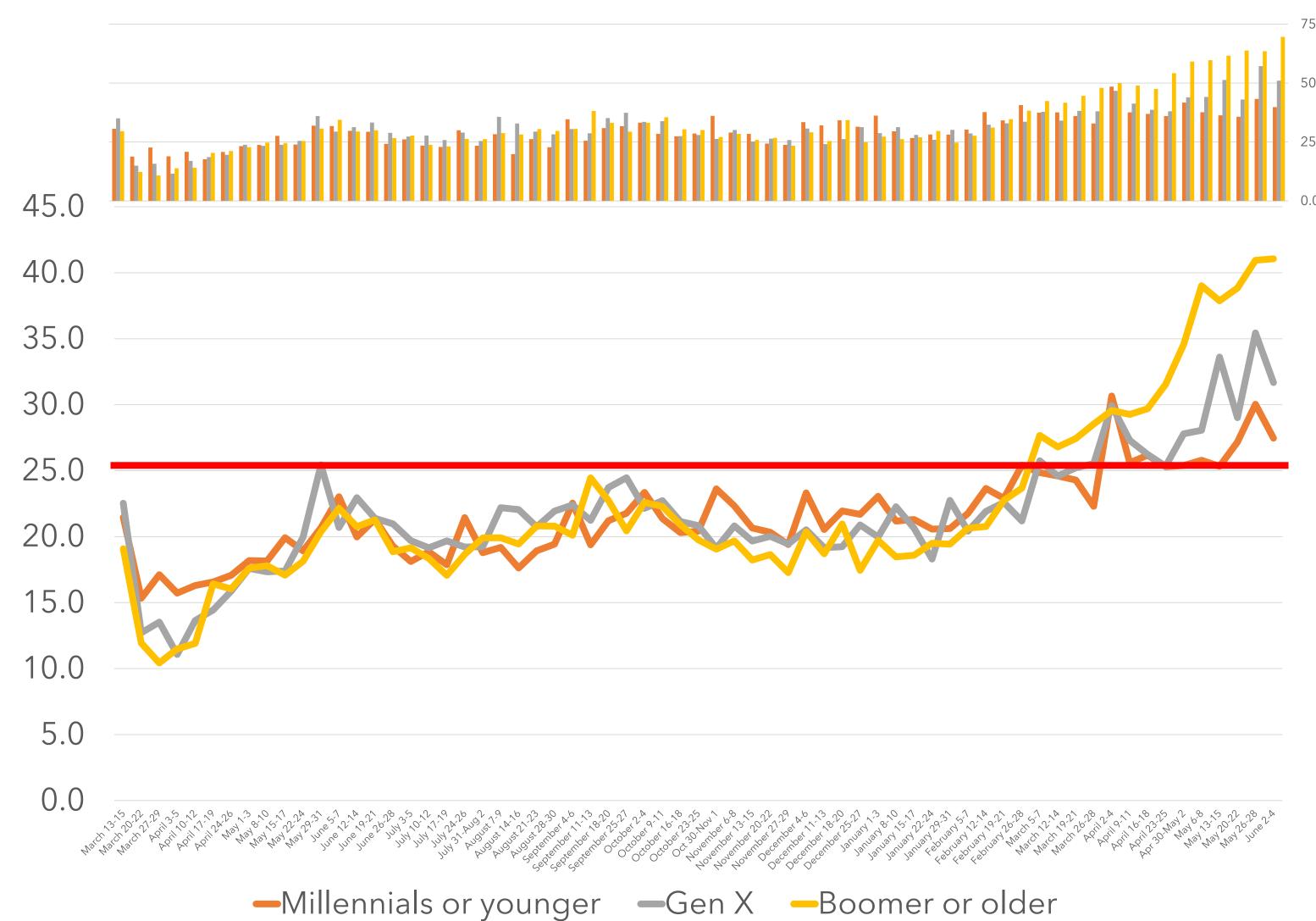


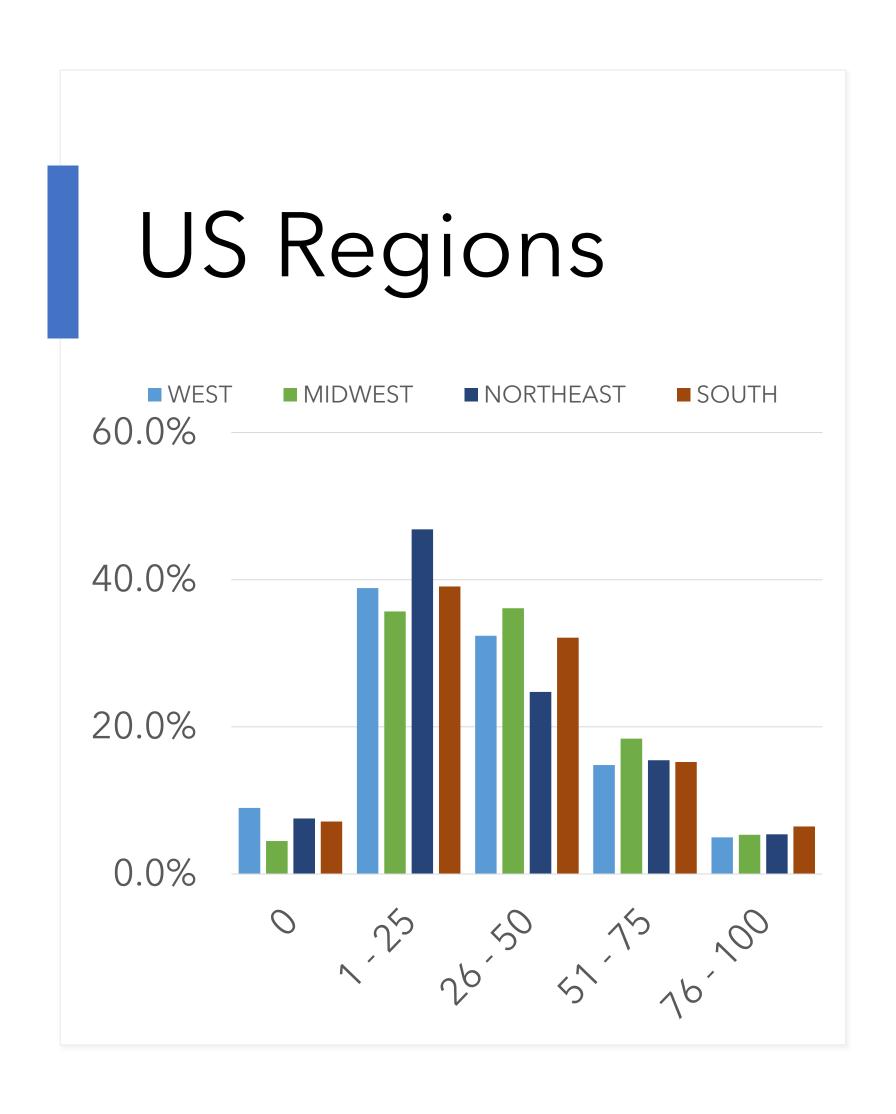


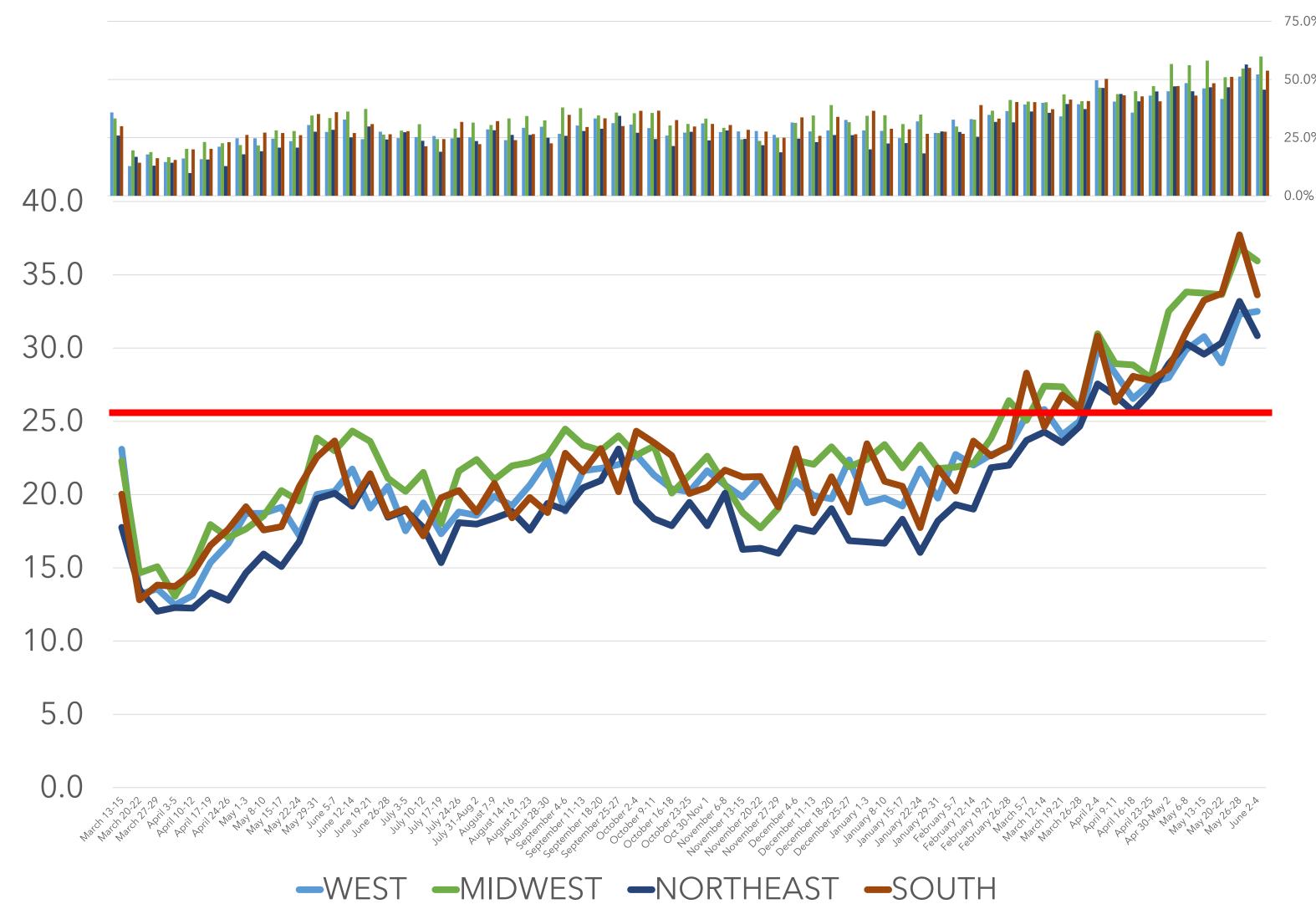


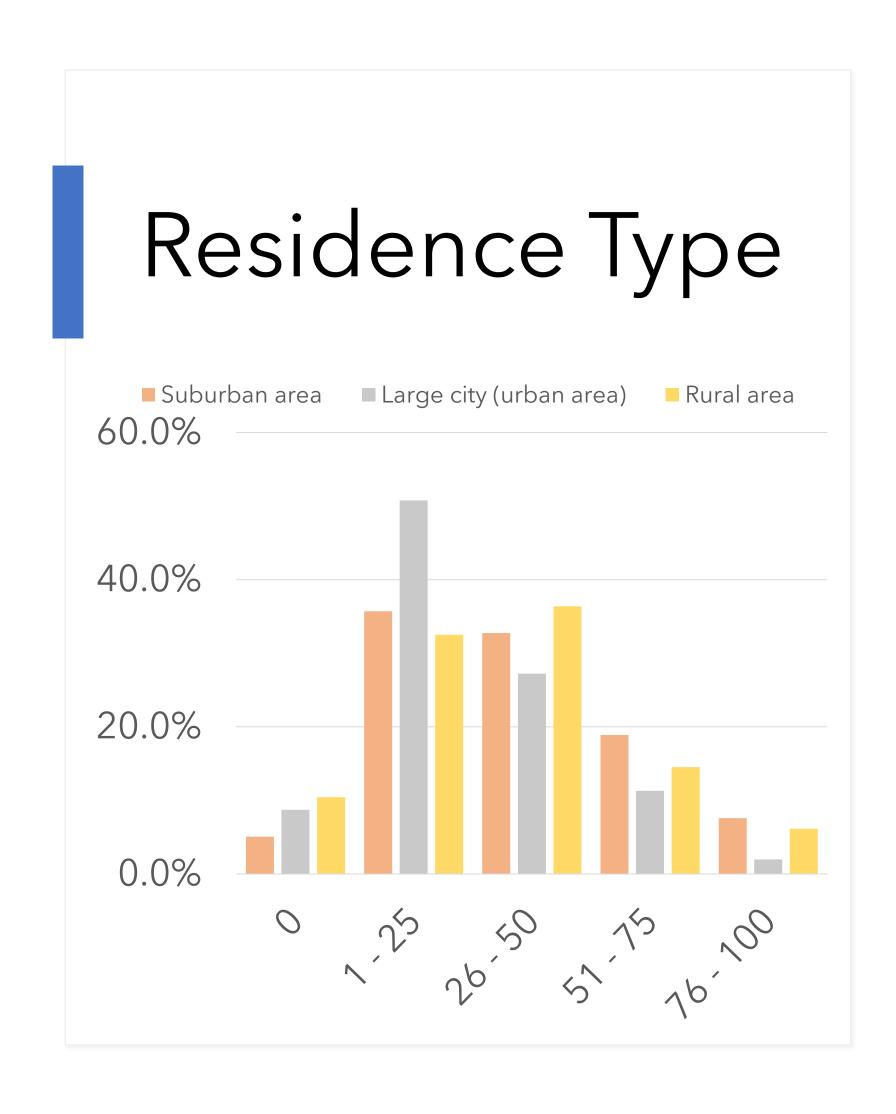


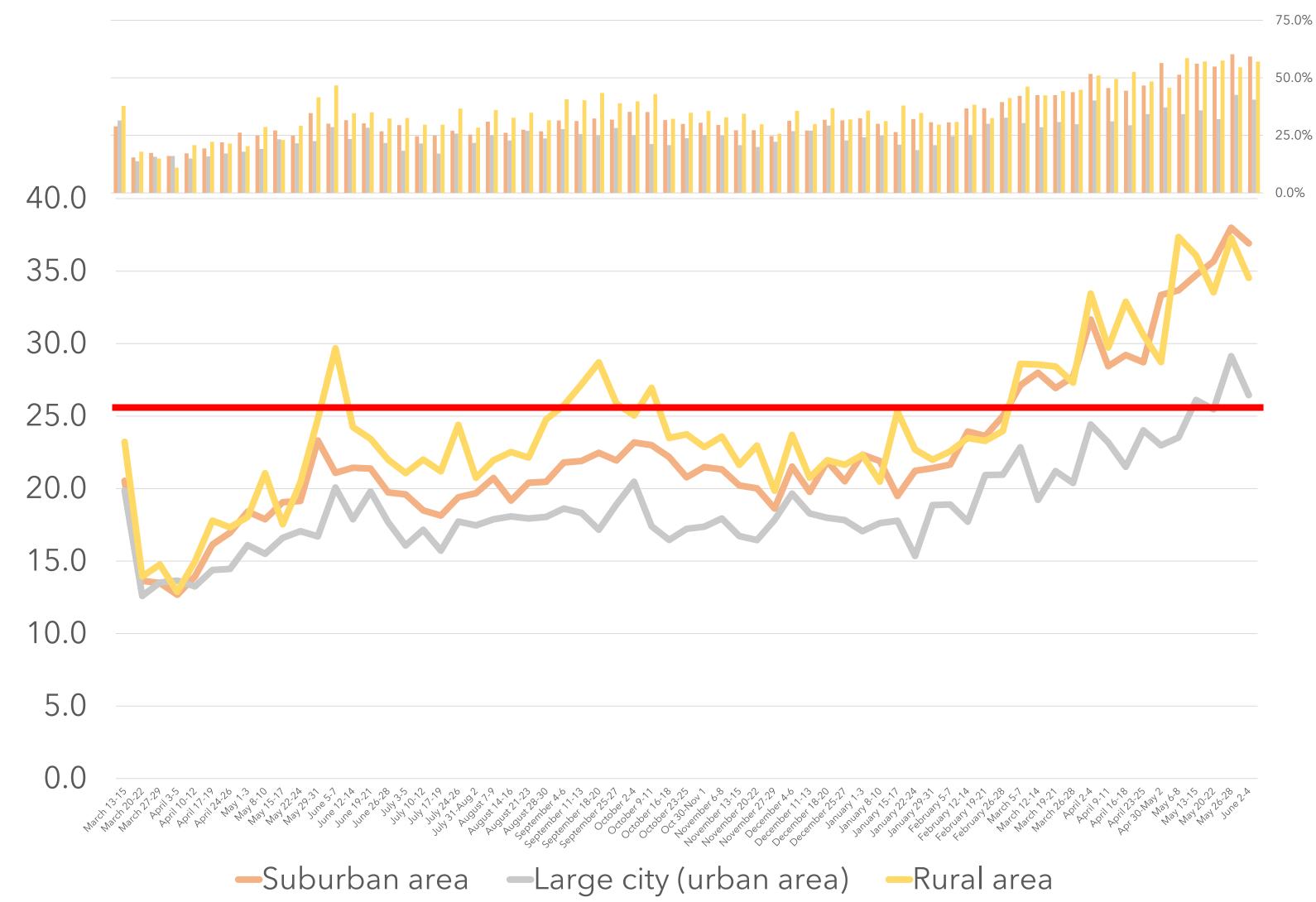


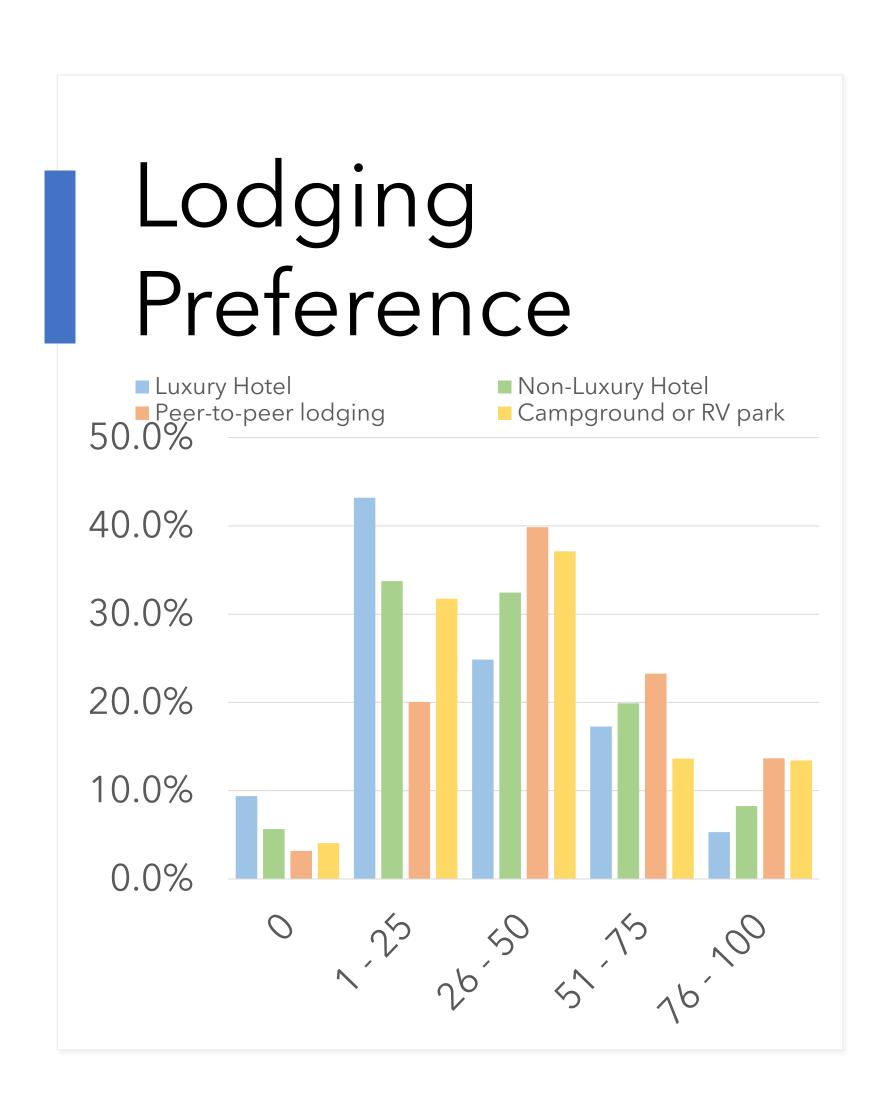


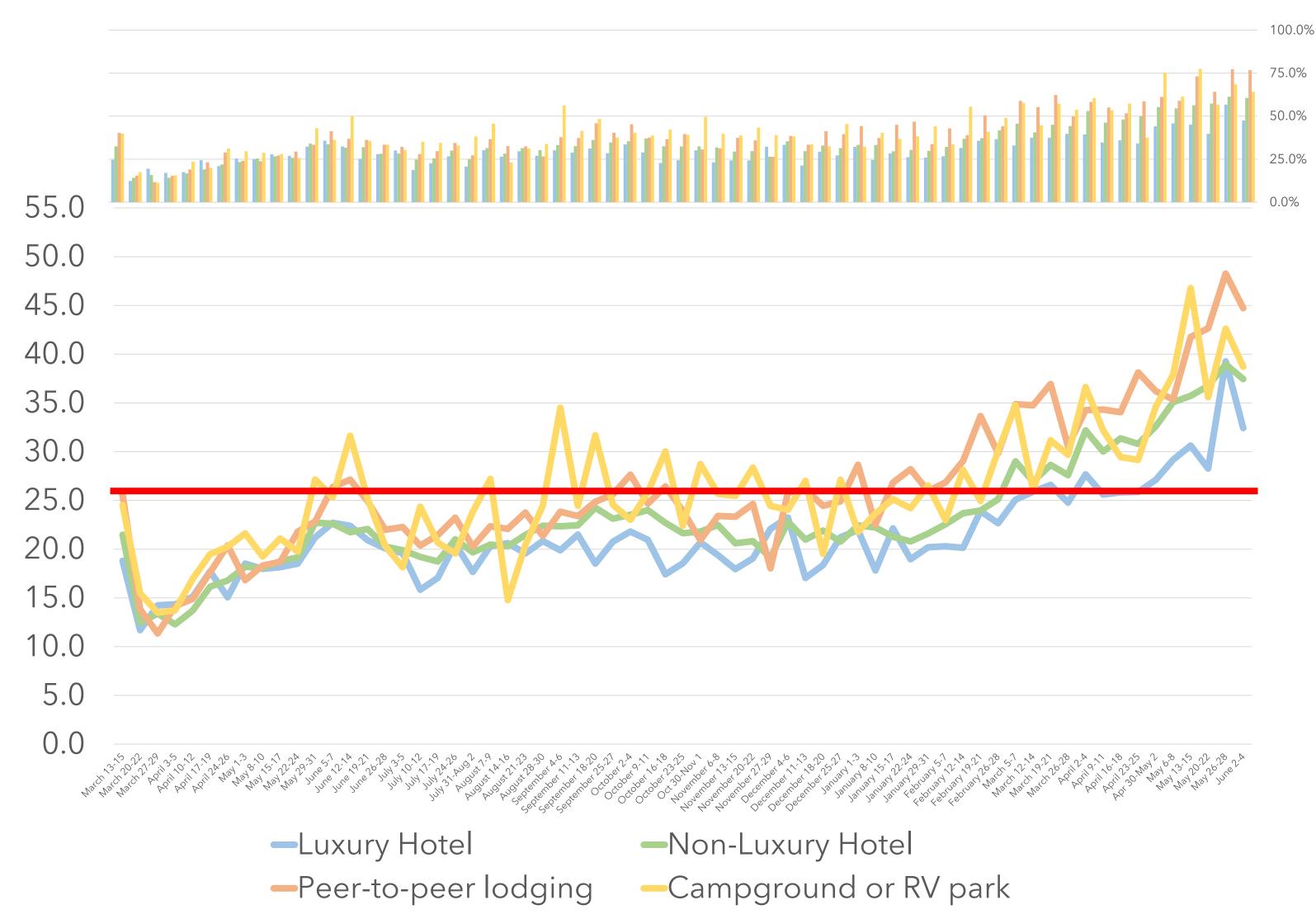














**Month-long subscribers**: The following section will show you how to access these results in our online dashboard called Displayr. On the dashboard, you can segment results by:

- 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

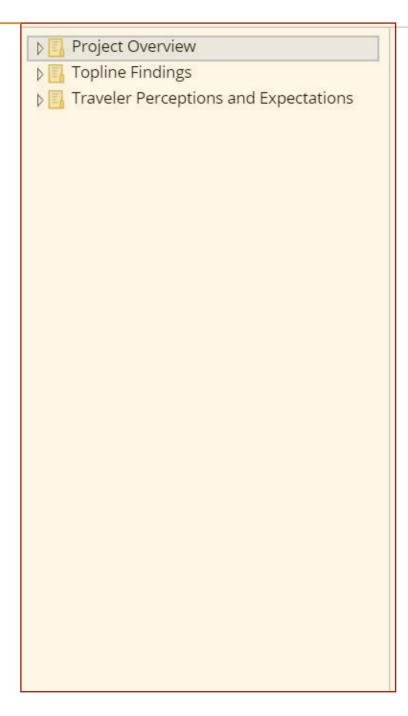
Guidelines on viewing, segmenting and exporting data from the dashboard.

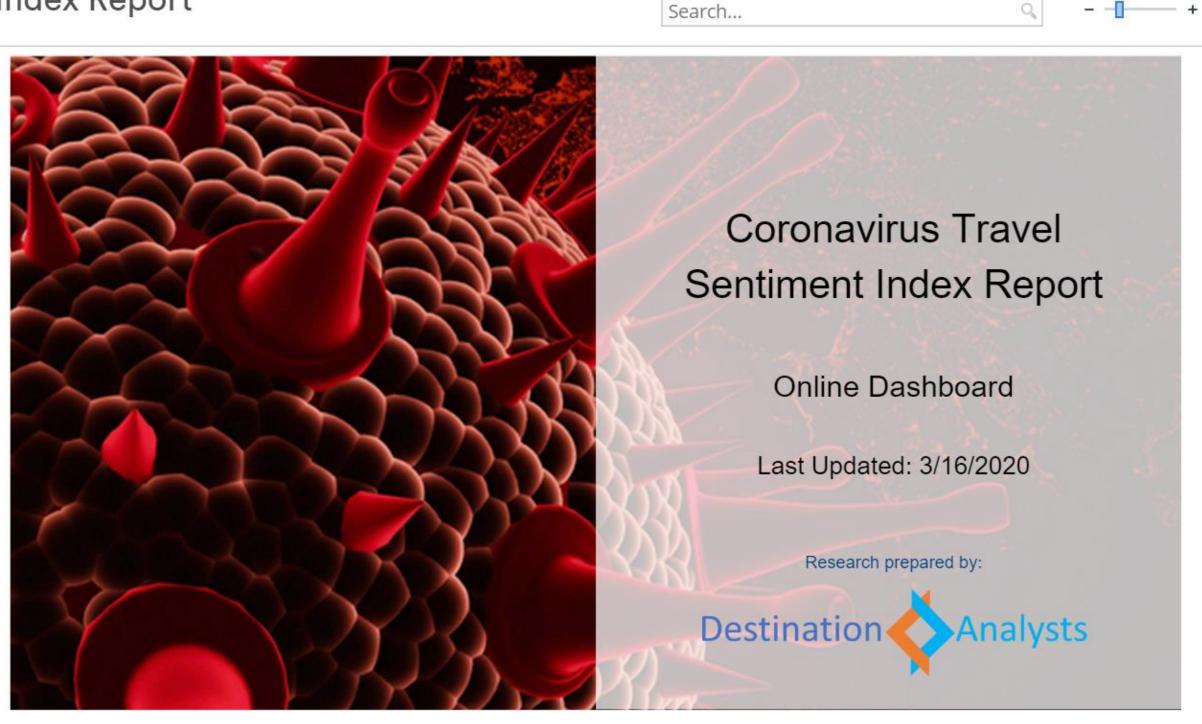


#### NAVIGATING THE DASHBOARD:

#### Coronavirus Travel Sentiment Index Report

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





#### **NAVIGATING THE REPORT:**

Coronavirus Travel Sentiment Index Report

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 Blows

Avoiding Travel Until the Crisis Blows

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 Convention

Avoiding Conferences or Convention

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



Search...

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.

#### FILTERING THE REPORT:

To segment the results by a specific group (generational, geographical, etc.)

Click on "Filters" in the top right corner.

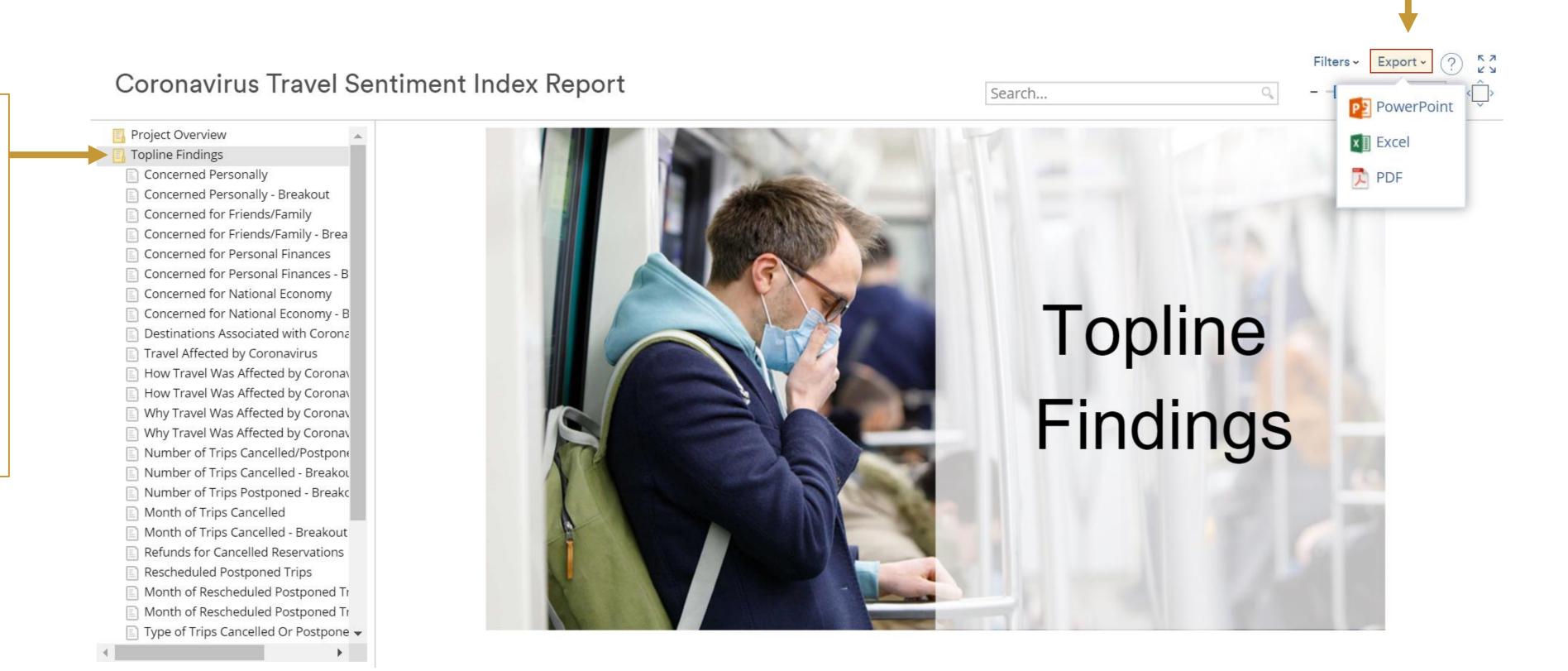


**IMPORTANT NOTE:** When you select a filter, it will ONLY APPLY to the specific data point you are currently viewing. It WILL NOT apply to the entire report. Be sure to check the base description in the blue text (highlighted here) to see if a filter is being applied.

#### **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"

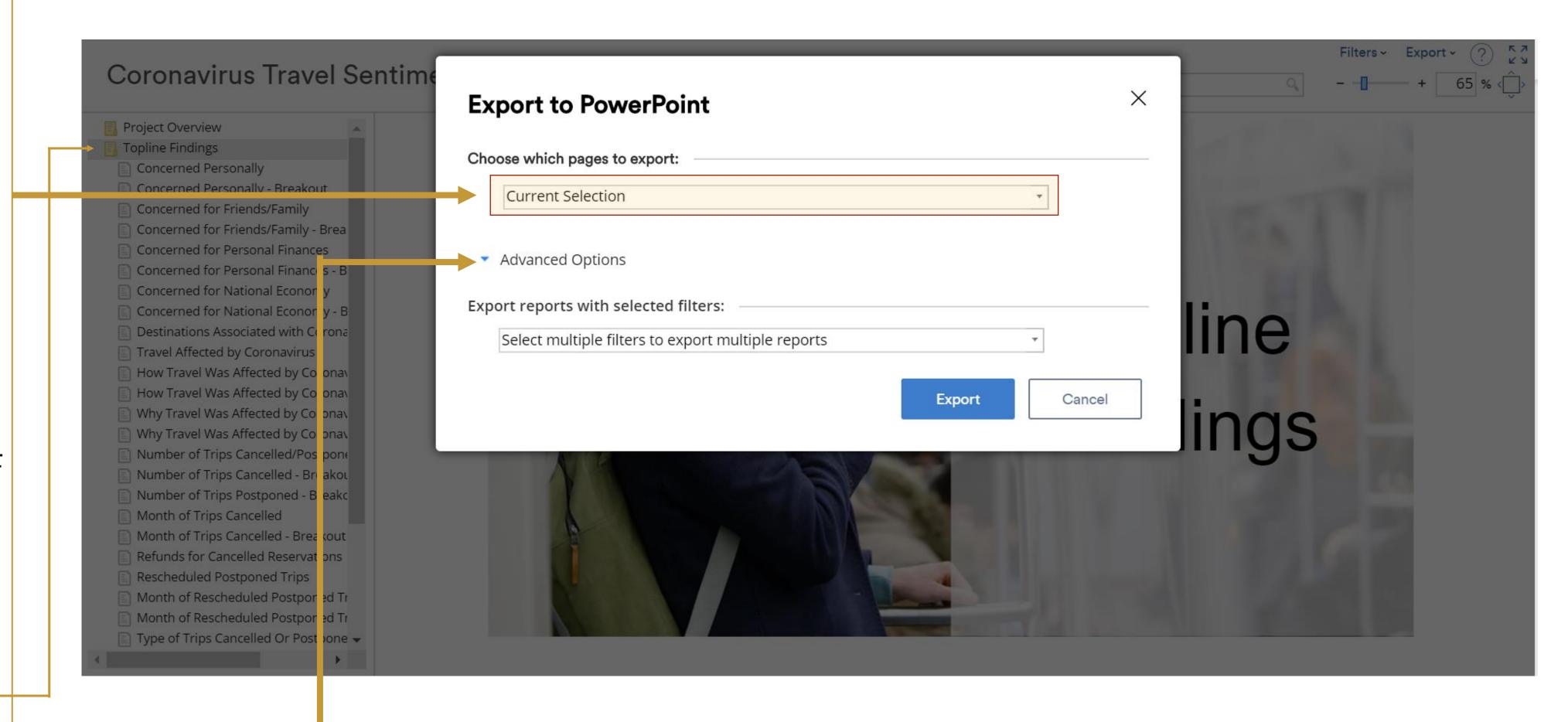


#### **EXPORTING THE DATA:**

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.

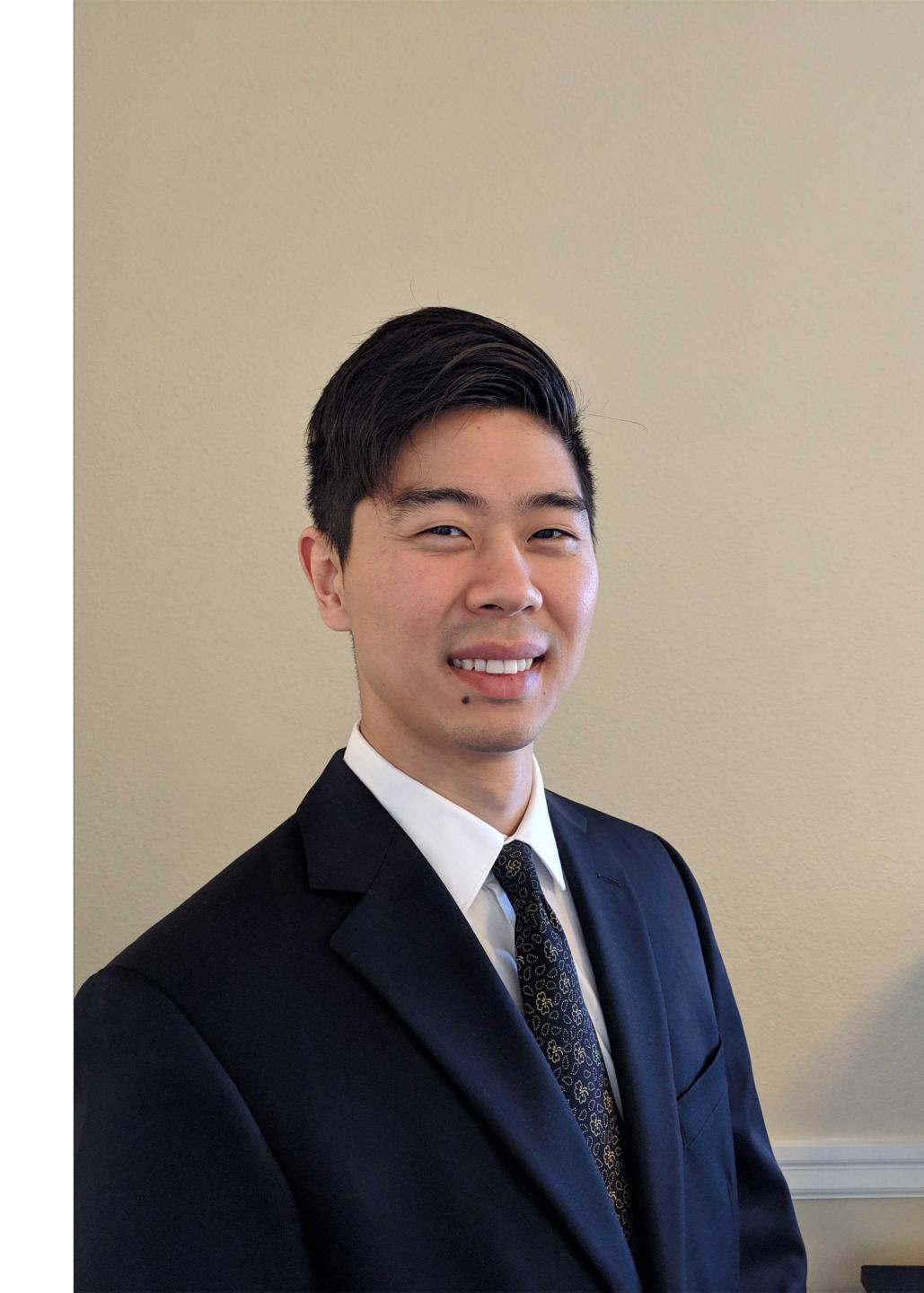


**IMPORTANT NOTE:** Use the "Advanced Options" to apply specific filters to the data you want to export.

## 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



### MORE RESEARCH WE CAN PROVIDE

- Visitor & Target Audience Profiles
- Audience Persona Identification
- Brand Performance
- Visitor Activity Analysis & Segmentation
- Resident + Stakeholder Research
- Advertising Testing



