## CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT

Presentation of Findings

February 23, 2021

## Destination Analysts

## METHODOLOGY



- Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions
- Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom
- Week 50 data (fielded February 19-21) will be presented today
- 1,200+ fully completed surveys collected each wave
- Confidence interval of +/- 2.8 \%
- Data is weighted to reflect the actual population of each region


## Independent, Unbiased

 Research
## NENTS

Busix:

1 top news oddnews entertainment sports photos
COVID-19 cases pass 28 million in U.S., deaths near 500,000
 so far Saturday. And fatalities are at 497,34.

Since the first case was announced in the state of Washington on Jan. 21 2020, cases have averaged 70,707 .

After reaching a peak of 299,786 on Jan. 2, infections have subsided. Friday's increase was 110,070 , four days after 53,970 , the lowest since 49,307 on Oct. 18.


## Pfizer, Moderna Vaccines Less Effective Against South African COVID Variant

Feb. 18, 2021, at 8:45 a.m.

BY ERNIE MUNDELL AND Robin Foster HealthDay Reporters
THURSDAY, Feb. 18, 2021 (HealthDay News) -- Two of the world's eading coronavirus vaccines don't work as well against a more contagious South African variant, though both did manage to neutralize the virus, two new studies show.


But experts pointed out that what level of neutralization is needed to actually protect against the variant is still unclear and these latest studies on the Pfizer and Moderna vaccines were done in a lab setting, and not the real world, the Washington Post reported. Both reports were published Wednesday in the New England Journal of Medicine.

These are in vitro studies and we don't know if there is a threshold for neutralization that defines protection. In fact, we don't even know that there is a quantitative correlation between antibodies levels and protection," NEJM Editor-in-Chief Eric Rubin said in a podcast on the findings. "It is very concerning that we don't know the clinical significance of these findings.
The two studies used genetically engineered versions of the South African variant against blood samples from vaccinated volunteers, the Post reported. The strain has been identified in many countries, including the United States, along with a variant first identified in Britain that scientists say is also highly contagious.
Moderna's research letter in the NEJM on its COVID-19 vaccine showed a sixfold drop in antibody evels against the South Africa strain, the newspaper said. The shot's efficacy against the variant has not yet been determined.
Pfizer, in testing its vaccine against the variant in a lab, found the shot generated about a third of the antibodies that are normally mobilized with the original strain. The activity, however, appeared to be enough to neutralize the virus.

Still, Pfizer said in a statement that it was "taking the necessary steps... to develop and seek authorization" for an updated vaccine or booster shot that could better combat the variant.

## As coronavirus variants spread, the US struggles to keep up

Without federal strategy or enough funding, US sequencing superpowers don't work megan molteni, wired.com - 2/20/2021, 5:00 AM

Across the United States, the coronavirus is in retreat. The pandemic is still raging, mind you, with more than 70,000 new cases still reported each day. But since the post-holiday peak in midJanuary, the seven-day average of new cases has fallen by nearly 64 percent. Hospitalizations have plunged too. And with vaccinations accelerating, there is a glimmer of hope that this downward trend might be the start of COVID's long slide toward containment, at least in the US and other wealthy countries that are hogging the shots.
But retreat does not always mean defeat. And the emergence of several worrisome new coronavirus variants with new tricks for spreading faster or evading immune responses presents another possibility: that the current reprieve will only be temporary. Public health experts ar urging governments to prepare for a possible new wave of infections driven by variants like B.1.1.7, which has already been identified in more than 1,200 US cases and in nearly every state according to data from the US Centers for Disease Prevention and Control.

That's more than double the number reported two weeks earlier. But the real number is likely far higher. How much higher? No one knows. That's because the only way to tell which version of the coronavirus is causing an infection is to sequence its genome. In this country, that should be easy enough-the US is a sequencing superpower. It has dozens of academic institutions and massive commercial labs with the capacity to crank out genomes at a rapid clip. But the federal government's response through much of the pandemic didn't include a plan to mobilize America's DNA-mappers into a coordinated coronavirus-monitoring corps. SARS-CoV-2 surveillance, well, sucked.

At the end of last year, the CDC finally got the green light to roll out additional programs and funding aimed at changing that. Since then, the US has boosted its sequencing from about 3,000 viral genomes per week to more than 7,000 . But
scientists say it's still not close to enough. And we're running out of time to catch up. Because while Congress debates a bill that could provide the necessary infusion of funds for building out the genomic surveillance system the US should have had all along, variants-both the ones scientists know to be worried about and the ones they haven't discovered yet-are expanding their territory.

Winter Storm Disrupts COVID-19 Vaccinations, Closing Clinics And
Delaying Shipments

## Feenaraybo, 202 II2




The massive storm sweeping across the country isn't only bringing subzero
temperatures and widespread power outages to much of the U.S., its also putting a
freeze on CoviD-19 vaccine distribution in several states and cities.
In Missouri, Gov. Mike Parson announced on Monday that all state-run mass ccination events scheduled for this week are canceled, citing safety concerns brougt on by the extreme weather.
Missouri is experiencing severe winter weather that makes driving dangerous and threatens the health and safety of anyone exposed to the cold. These conditions will
also ikely delay some vaccine shipments," Parson said. 'We want to protect the safe of everyone involved in the mass vacination events, from the patients being vacinated to the volunters who generouly support these events.

## Shipments, Providence Cancels

 Upcoming ClinicsBy The Chronicle Feb 18, 2021


Cold weather across the nation is causing delays in COVID-19 vaccine shipments, the state Department of Health ( DOH ) announced Thursday. More than $90 \%$ of this week's allocations will be impacted, forcing many providers - including Providence Centralia and St. Peter hospitals - to reschedule appointments.

The state's mass vaccination sites will also close down over the weekend.
"We realize this is an inconvenience," reads a Thursday Providence press release. "Every person who has an appointment to be rescheduled has been notified via email but we realize some people may miss this email."
Four Providence vaccination events, spanning from Feb. 19 to Feb. 21, have been canceled, including a second-dose event at the Southwest Washington Fairgrounds. A small amount of vaccine will be given out to individuals scheduled for Feb. 18 and 19 at Providence Medical Group in Lacey. The provider will be prioritizing patients "who are coming close to their six-week window for the second-dose vaccine" and trying to get them into cancelled appointments.
"Please note, the CDC has determined there are no health implications in delaying the vaccine by two weeks," the press release reads.

## More than 20 million years of life may have been lost due to Covid, study finds

Covid-19 has cost more than 20.5 million years of life across the globe, including well over 800,000 in the UK, according to new analysis.

The paper, published in Scientific Reports journal, found the virus has cut short thousands more lives than comparable illnesses, such as influenza and heart disease.
'Years of lost life' (YLL) is a measure of the difference between an individual's age at death and their life expectancy.

The researchers found that across 81 hard hit countries, Covid-19 caused people to die on average 16 years earlier than they otherwise would have.

Dr Simon Clarke, associate professor in cellular microbiology at the University of Reading, said: "This study shows the staggering scale of the human cost of this pandemic.
"[It] highlights the combined cost of the pandemic so far in terms of lives cut significantly shorter by a virus that kills people earlier than seasonal flu, or even heart disease."

The study suggests that 44.9 percent of the YLL have occurred in people aged between 55 and 75 .

While 30.2 percent occurred in individuals younger than 55 , and 25 percent in those older than 75 .

## YLL = Years of Life Lost

## 25\% of all YLL = Over 75

45\% of all YLL = 55-75 years
$30 \%$ of all YLL = under 55

Enthusiasm for travel, while still challenged, has significantly improved in recent weeks .

Our predictive indexes continue to move forward. Our hopes are high for a break-through period.
3
Recent changes in traveler optimism have not yet driven significant increases in trip planning behavior.

4
Progress from efforts to encourage vaccination appears to have stalled.
5
A majority of travelers expect they will feel comfortable returning to commercial outdoor attractions by July.


Enthusiasm for travel, while still challenged, has significantly improved in recent weeks.

## 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)


## 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
$\qquad$
(Base: Wave 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES ו-50)

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

In the next month the coronavirus situation will $\qquad$


## 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)

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\text { (Base: Wave } 50 \text { data. All respondents, 1,210 }
$$

completed surveys. Data collected February 1921, 2021)


## 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

(Since November)

## 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 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## OPENNESS TO TRAVEL INSPIRATION

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



## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WaVE 50)

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

(Base: Wave 50 data. All respondents,
1,210 completed surveys. Data
collected February 19-21, 2021)
Top 2-Box Score: Percent Selecting Each as
"Somewhat Unsafe" or "Very Unsafe"


[^0]
## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WaVE 50)

(Base: Wave 50 data. All respondents,
1,210 completed surveys. Data
collected February 19-21, 2021)
Top 2-Box Score: Percent Selecting Each as
"Somewhat Unsafe" or "Very Unsafe"
Question: At this
moment, how safe would
you feel doing each type
of travel activity?


[^1]
## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 1-50)

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

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


## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 1-50)

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

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

## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WaVE 50)

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

(Base: Wave 50 data. All respondents,
1,210 completed surveys. Data
collected February 19-21, 2021)

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


[^2]
## PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES ו-50 COMPARISON)

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


## Question: What ONE WORD best describes how you feel about travel right now?

## Feelings About Traveling Now: Historical Perspective

Question: What ONE WORD best describes how you feel about travel right now?


September


## ONE WORD THAT DESCRIBES TRAVEL RIGHT NOW

Question: What one word best describes how you feel about travel right now?
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



## 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 -50. All respondents, $1,201,1,200,1,201,1,216,1,263,1,238,1,208$,
$1,204,1,200,1,212,1,223,1,257,1,214,1,214,1,205,1,231,1,365,1,213$,
$1,200,1,206,1,224,1,201,1,202,1,207,1,250,1,225,1,205,1,200,1,205$,
$1,203,1,203,1,204,1,203,1,203,1,205,1,206,1,205,1,205,1,204,1,206$, $1,201,1,207,1,206,1,225,1,205,1,206,1,209,1,209,1,216$ and 1,210 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.


## 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.


## COMFORT ENJOYING HOME COMMUNITY

How much do you agree with the following statement?
Statement: I feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

## Historical data


-Agree or Strongly agree Disagree or Strongly disagree


## 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)
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## 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.


Neutral (neither agree nor disagree), 31.5\%


Strongly disagree 8.9\%

## 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?


## HOW WELCOMING WAS THEIR MOST RECENT DESTINATION

## Question: During your most recent trip, how welcoming were the local residents? (Select one)





Our predictive indexes
continue to move forward.
Our hopes are high for a break-through period.

## Predictive Index Formula


*Normalized to a 100pt scale

## Healthy Travel Outlook




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

- Mountain Travelers
—Desert Travelers
-Suburban area
-Large city (urban area)
-Rural area
-Luxury Hotel
-Non-Luxury Hotel
—Peer-to-peer lodging
-Campground or RV park


## Percent Potentially Marketable

(Index Above 25)

## Airline and Cruise Travelers

$\square$ Air Travelers ■ Cruise Travelers




## Percent Potentially Marketable

(Index Above 25)

## Gender



## 

## Percent Potentially Marketable

(Index Above 25)

## Generation



## 

30.0


## Percent Potentially Marketable

(Index Above 25)

## US Regions




10.0


## Percent Potentially Marketable

(Index Above 25)

Residence Type



## Percent Potentially Marketable

(Index Above 25)

## Lodging Preference





Recent changes in traveler optimism have not yet
driven large increases in
trip planning behavior.

## 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 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


[^3]
## 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)

■February 19-21
-January 1-3


## 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 50 data. All respondents, 1,210 completed surveys. Data collected February 1921, 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 $\qquad$
$50 \%$

- January 1-3
- January 8-10

■ January 15-17
■ January 22-24
■ January 29-31
■ February 5-7
■ February 12-14
February 19-21


## 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 50 data. All respondents, 1, 143 completed surveys. Data collected February 19-21, 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)


## LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

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

I expect to take $\qquad$ leisure trips
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

Question: HOW MANY LEISURE TRIPS do you expect to take (even if tentatively) in the next three months?
I expect to take $\qquad$ leisure trips



Progress from efforts to encourage vaccination appears to have stalled.

## 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, 35-50 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 and 1,210 completed surveys.)

FDA Approves
First Vaccines

Average = 58.4\%


## EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Wave 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## EXPECTED SAFETY OF COVID-19 VACCINES

Question: How safe do you
expect a COVID- $\mathbf{1 9}$ vaccine will
ultimately be? (Select one)
(Base: Waves $35-50$ data. All respondents,
$1,205,1,206,1,205,1,205,1,204,1,206$,
$1,201,1,207,1,206,1,225,1,205,1,206$,
$1,209,1,209,1,216$ and 1,210 completed
surveys.)

FDA Approves
First Vaccines


## VACCINES AND OPTIMISM FOR A RETURN TO NORMAL

## Question: Do 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
$\qquad$
life returning to normal (or near normal) in the next six months.
(Base: Wave 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## VACCINES AND OPTIMISM FOR SAFE TRAVEL

## Question: Do 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 meabout
BEING ABLE TO TRAVEL SAFELY in the next six months.
(Base: Wave 50 data. All respondents,
1,210 completed surveys. Data collected February 19-21, 2021)


Neutral (Neither more nor less optimistic)



## VACCINES AND OPTIMISM FOR LIFE NORMAL + SAFE TRAVEL

—Life returning to normal -Traveling safely

\% More Optimistic or Much more Optimistic

## 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) 1,210 completed surveys. Data collected February 19-21, 2021)



A majority of travelers expect they will feel comfortable returning to commercial outdoor attractions by July.

## OUTDOOR ATTRACTION VISITATION: PAST 6 MONTHS

Question: Have you visited an outdoor attraction (e.g., zoos, gardens, parks, amusement parks, etc.) in the past SIX (6) MONTHS?
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)

Yes, 32.0\%


## FEELINGS OF SAFETY AT OUTDOOR ATTRACTIONS

Question: In general, how safe did you feel during your most recent visit to an outdoor attraction? (Select one)


## REASONS FOR NOT VISITING OUTDOOR ATTRACTIONS

## Question: Which of the following (if any) describe why you haven't visited an outdoor attraction in the PAST SIX (6) MONTHS? (Select all that apply)

(Base: Waves 50 data. Respondents who have not visited an outdoor attraction in the past 6 months, 835 completed surveys. Data collected February 1921, 2021)


## INTEREST IN OUTDOOR ATTRACTION TYPES

Question: How interested are you to visit each of the following types of outdoor attractions while traveling in the NEXT SIX (6) MONTHS?
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)
\% Interested or Very interested


## DESIRED SAFETY PROTOCOLS AT OUTDOOR ATTRACTIONS

Question: Thinking about safety protocols you would want at commercial outdoor attractions (e.g., zoos, amusement parks, theme parks, festivals, concerts, sporting events, etc.), tell us how you feel about each of the following options.

In general, would they be a good or bad idea? (Use the scale provided to evaluate each)
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


## WHEN THEY'LL FEEL COMFORTABLE AT OUTDOOR ATTRACTIONS

Question: Thinking about the future, when do you expect you will feel comfortable visiting a commercial outdoor attraction(s) (e.g., zoos, amusement parks, theme parks, festivals, concerts, sporting events, etc.)?
(Select the FIRST month you think you will start to be comfortable)
(Base: Waves 50 data. All respondents, 1,210 completed surveys. Data collected February 19-21, 2021)


# THE VALUE OF DMOS 

Best Practices in Official DMO Websites \& Visitor Guides During the COVID-19 Crisis

Thursday, February 25, 3pm ET

## Do you have a survey topic you want us to explore?

Send suggestions or requests for questions to:

> Inf@DestinationAnalystis.com \& Myha@DestinationAralysts.com


## Destination $A P C L O$

## MORE RESEARCH WE CAN PROVIDE

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


[^0]:    Destination $>\underset{\text { oo voui research }}{\text { Analysts }}$

[^1]:    Destination $<\underset{\text { oo voun ressearch }}{\text { Analysts }}$

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[^3]:    Destination $\widehat{\text { oo vour ResEanch }}$ Analysts

