

The background of the slide features a silhouette of three hikers ascending a mountain peak. The hiker at the top is reaching up, the middle hiker is pulling the bottom hiker up, and the bottom hiker is pushing off. The sun is setting or rising behind the mountain, creating a warm, orange glow. The title text is overlaid on the left side of the image.

# CORONAVIRUS TRAVEL SENTIMENT INDEX

Presentation of Findings  
March 9<sup>th</sup>, 2021 – Wave 52





# THANK YOU

**ARIZONA**  
OFFICE OF TOURISM

DISCOVER  
*Puerto Rico*



VISIT  
*anchorage*  
ALASKA

*Los Angeles*  
TOURISM & CONVENTION BOARD

**VISIT  
BALTIMORE**



**DENVER**  
The Mile High City

VISIT  
**CARSON CITY**  
NV...*Safety*



*Visit* **HERSHEY & HARRISBURG**



**MONTANA**  
OFFICE OF TOURISM AND BUSINESS DEVELOPMENT



*Visit Big Sky*

VISIT  
**PHOENIX**

CAYMAN ISLANDS

@explore  
**FAIRBANKS**  
ALASKA

LET'S **TEXAS**



LIFE  
**UTAH**  
ELEVATED

**LOVE**  
COMMUNICATIONS

*Wilmington, C.*  
River District & Island Beaches

**Nashville**  
MUSIC CITY

*Salem*  
Still making history.

*Little Rock*

*visit*  
**California**

**TRUCKEE**  
Base camp for a big life



GLACIER COUNTRY  
**MONTANA**

VISIT **FLORIDA**

*Alexandria*  
EST. 1749

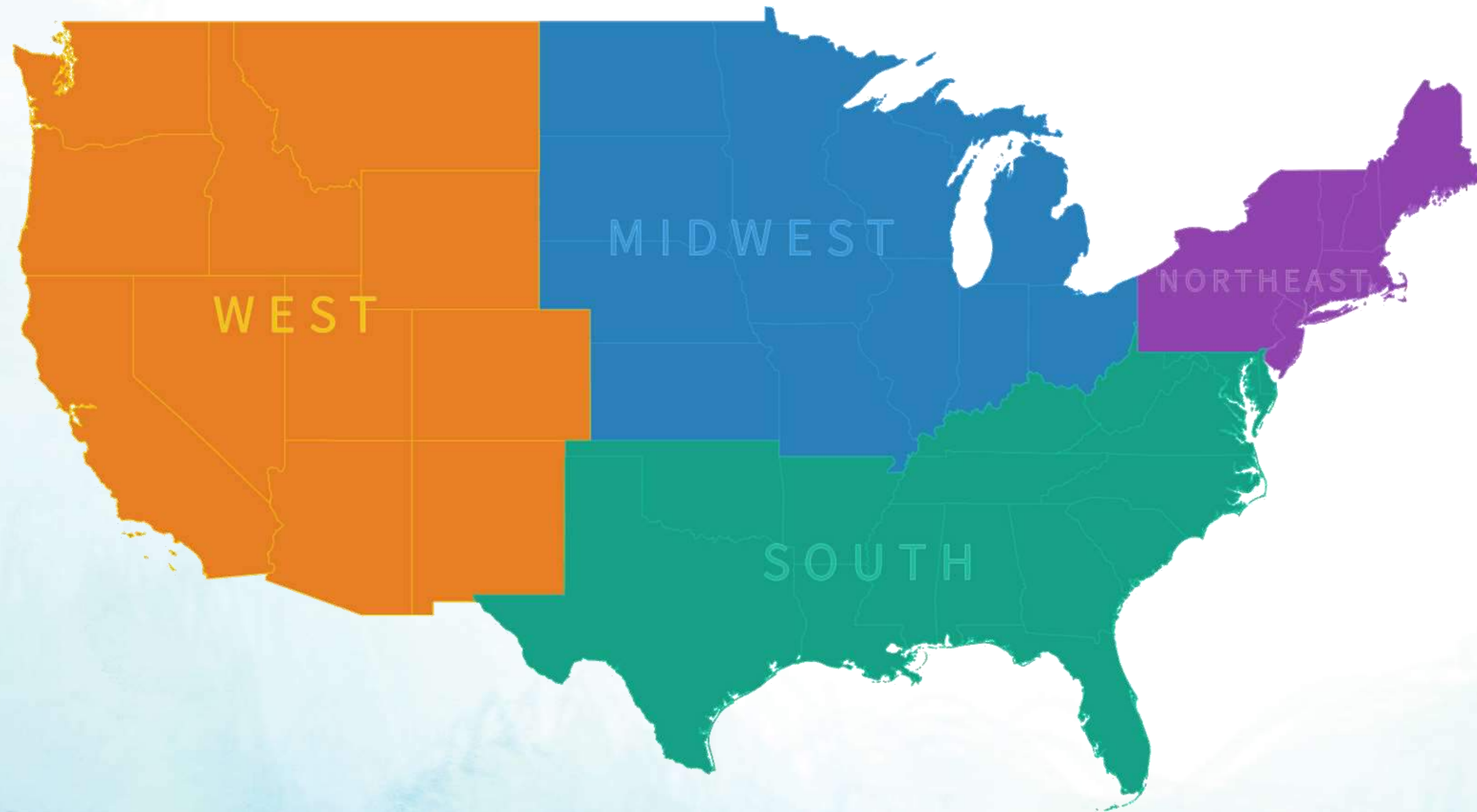
**NC**  
NORTH CAROLINA

**GULF SHORES & ORANGE BEACH**  
Alabama's white-sand beaches

Destination **Analysts**  
DO YOUR RESEARCH



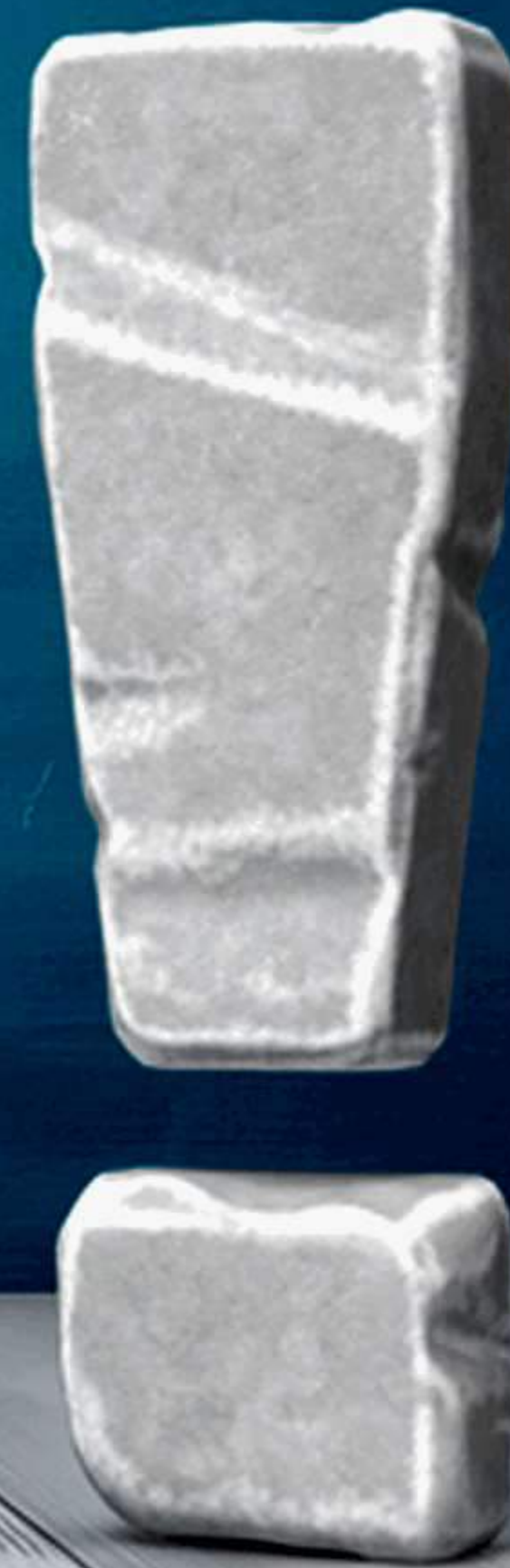
# METHODOLOGY



- **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 51 data (fielded March 5-7) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of  $\pm 2.8\%$**
- **Data is weighted to reflect the actual population of each region**



# Independent, Unbiased Research











## US coronavirus: Leaders and businesses say masks are essential protection as Texas and Mississippi lift Covid-19 restrictions

By Madeline Holcombe, CNN · 43 mins ago



Leaders and businesses across the United States are [pushing back against states lifting mask mandates](#) by doubling down on their commitment to enforcing Covid-19 precautions as variants continue to cause concern.

This week, Texas and Mississippi joined the list of states expanding business capacity and lifting the mandates for residents to wear masks. In Texas, the mandates are no longer necessary and a restoration of normalcy is urgent, a representative for Gov. Greg Abbott said.

Though the rates of infections, hospitalizations and deaths have decreased in many states since January, tens of thousands of Americans are still being infected daily, and more transmissible [variants have been spreading, threatening another surge](#).

"Please continue to wear a mask. What some other states are doing is reckless," Kentucky Gov. Andy Beshear said. "We've seen them do it before. They paid the price."

And in Texas, many businesses are still encouraging mask use. The grocery store chain H-E-B said Thursday that employees will still be required and guests will be asked to wear masks. The Texas Restaurant Association also will continue to encourage mask use.

In Mississippi, Greenville Mayor Errick Simmons called Gov. Tate Reeves' decision to loosen restrictions "premature and reckless."

"We are at a crucial moment in the fight against this disease, and the path is unclear," Simmons told CNN. "We cannot let our guards down."

In West Virginia, Gov. Jim Justice said Friday that restaurants, bars and other businesses including gyms, fitness centers and museums may open with 100% seating capacity with social distancing.



**29,003,898**

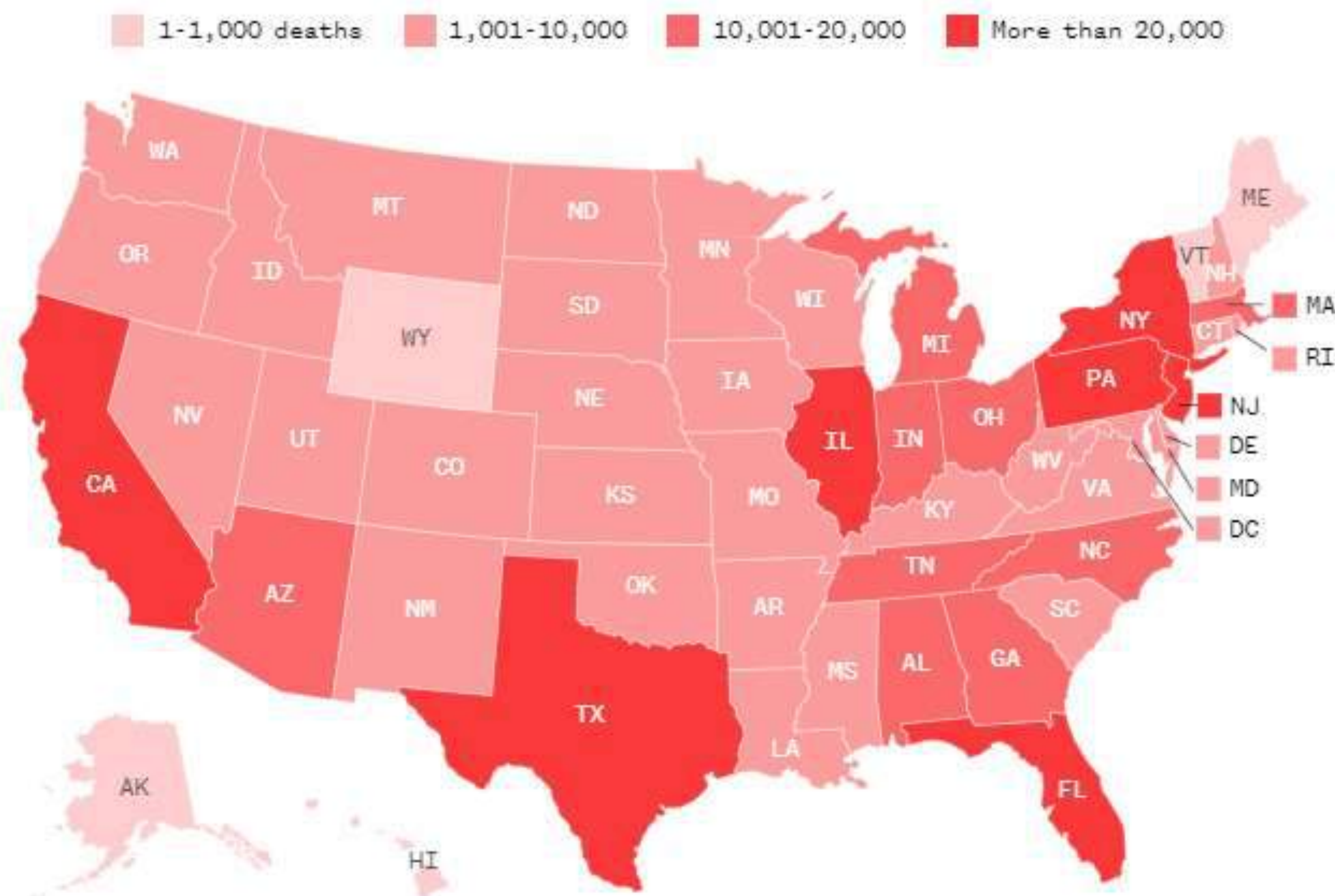
Confirmed cases in U.S.

**524,560**

Deaths in U.S.

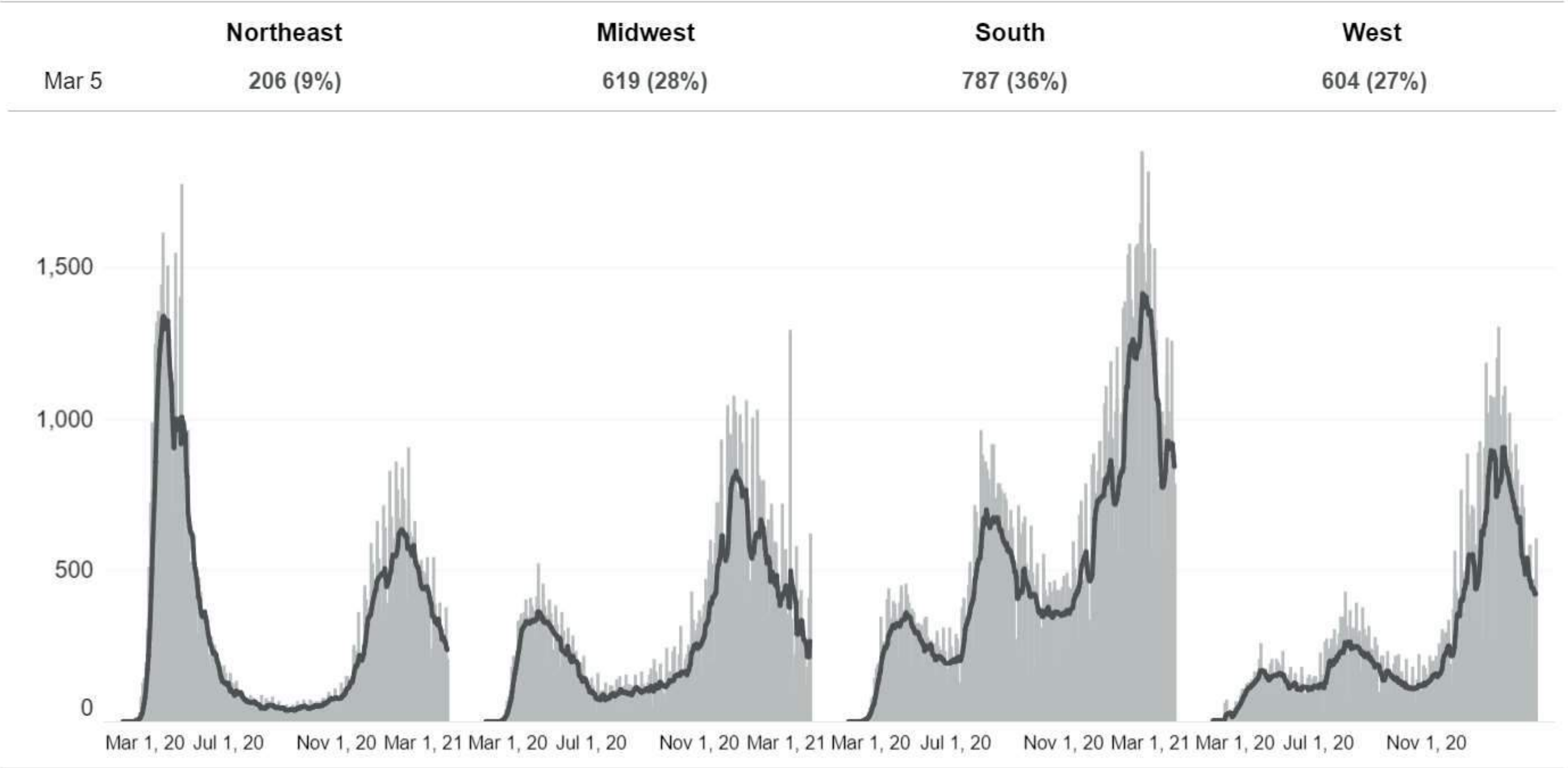
## Coronavirus deaths in the United States

*Hover over a state to see how many confirmed cases and deaths there are across the country.*



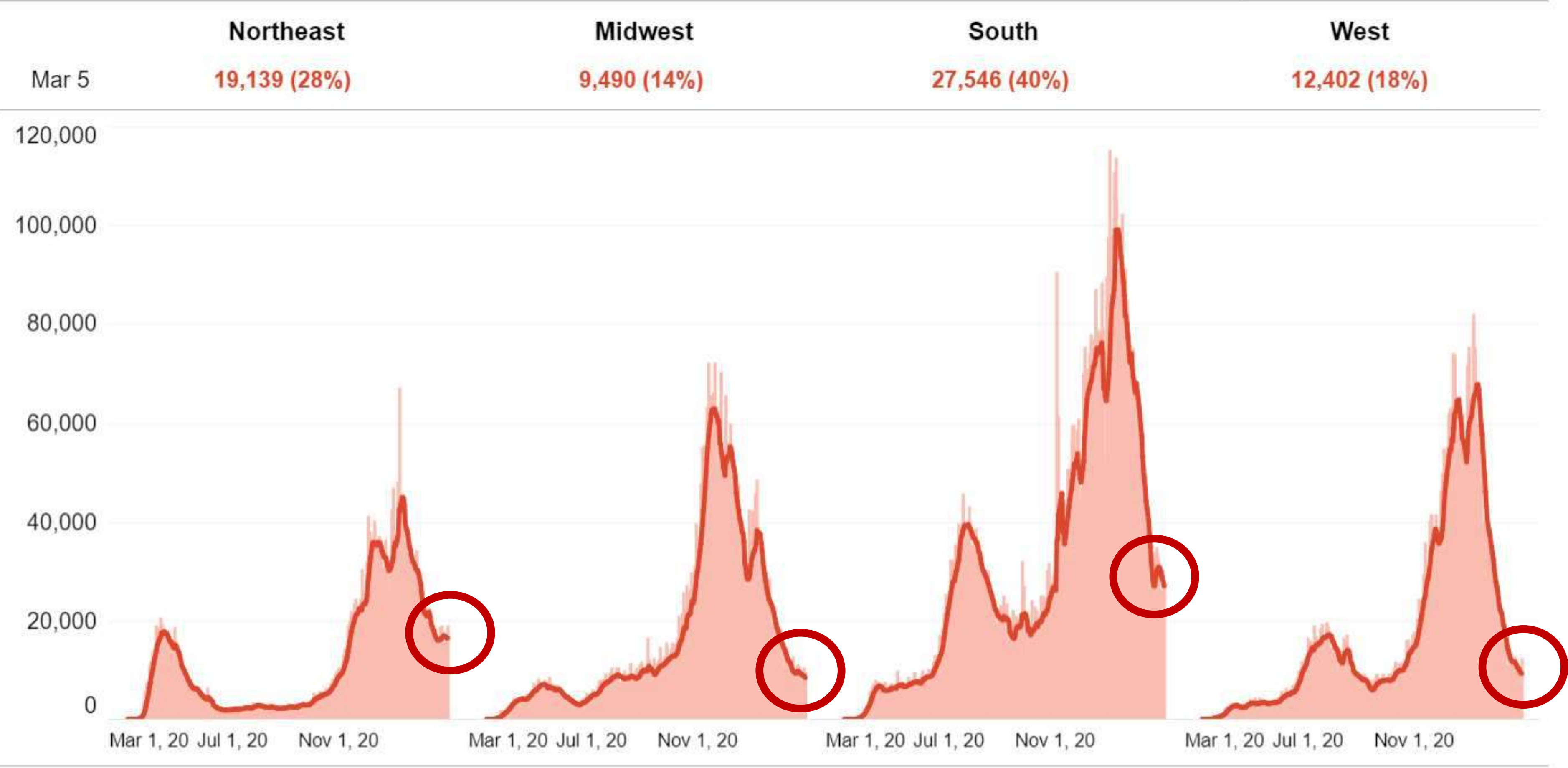


# REGIONAL DAILY DEATHS. 7-DAY AVERAGE LINE





# REGIONAL DAILY CASES. 7-DAY AVERAGE LINE





## Is a spring coronavirus surge inevitable?



### What's happening

For the first time in months, there are reasons for optimism about the state of the coronavirus pandemic in the United States. The numbers of infections and deaths have dropped substantially from their peaks in the winter months. More than [50 million Americans](#) have received at least one dose of the vaccine so far, and the vaccination rate is expected to increase. All this encouraging news has many experts predicting a return to a reasonable facsimile of normal by the summer.

A lot of those same experts, however, are warning that it's too early to begin celebrating the end of the pandemic. "We may be done with the virus, but clearly the virus is not done with us," Dr. Rochelle Walensky, director of the Centers for Disease Control and Prevention, said Friday.

Walensky's concern, echoed by many other infectious disease experts, is that the downward trend in cases will lead state and local governments to lift restrictions prematurely, setting off a new wave of infections in the spring months. This potential spring surge could be accelerated by the spread of more transmissible and deadlier virus variants like the one first identified in the United Kingdom — which researchers believe could become the dominant strain in the U.S. by the end of the March.

## First Thing: A fourth coronavirus surge in the US is possible, CDC warns

The CDC director warned the US could face a fourth Covid wave before the vaccine rollout is completed. Plus, Andrew Cuomo, the New York governor, faces growing calls to resign



▲ Rochelle Walensky said the wave was preventable if people followed public health guidelines. Photograph: Kevin Lamarque/Reuters

Good morning.

The US could experience a "fourth surge" of coronavirus before the majority of the country was vaccinated, the director of the federal Centers for Disease Control and Prevention (CDC), [warned yesterday](#).

Speaking at a White House briefing, Rochelle Walensky said a recent increase in coronavirus cases and the circulation of new variants of the virus meant another wave was possible, warning that "we stand to completely lose the hard-earned ground we have gained." Daily case numbers fell sharply in January but have since begun to increase. However, Walensky said it was possible to prevent another surge, providing people followed "the critical safeguards that we know can stop the spread of Covid-19".

## As states loosen restrictions and variants spread, Fauci warns that the U.S. could be headed for yet another virus spike.



March 6, 2021, 9:42 a.m. ET  
By Ron DePasquale and Isabella Grullón Paz

States have continued steadily lifting restrictions, despite warnings from top federal health officials like Dr. Anthony S. Fauci that new coronavirus cases in the United States have plateaued at a very high level after their drastic drop has stalled, and that the country urgently needed to contain the spread of more transmissible variants.

Arizona, California and South Carolina joined a growing list Friday by loosening restrictions, to varying degrees. Arizona's governor ended capacity limits on businesses, but said they must still require masks. South Carolina's Republican governor lifted the state's mask mandate in government buildings, while recommending that restaurants continue to require masking.

California will allow amusement parks and outdoor sports and live events at stadiums to restart on April 1, with reduced capacity and mandatory masks.

"We've just now recently experienced the worst surge," Dr. Fauci said Friday [during a White House coronavirus briefing](#), adding that the country had plateaued at between 60,000 and 70,000 new cases per day. "When you have that much of viral activity in a plateau, it almost invariably means that you are at risk for another spike."



## Detroit mayor turned down J&J vaccine in favor of others

By DAVID EGGERT Associated Press · Mar 5, 2021 Updated 1 hr ago



FILE – In this April 23, 2020, file photo, Detroit Mayor Mike Duggan speaks in Detroit. Mayor Duggan this week turned down 6,200 doses of the newly authorized Johnson & Johnson coronavirus vaccine, with favoring shots from Pfizer and Moderna for now. "Johnson & Johnson is a very good vaccine. Moderna and Pfizer are the best," he said Thursday, March 4, 2021. "And I am going to do everything I can to make sure that residents of the city of Detroit get the best."

Carlos Osorio



By DAVID EGGERT Associated Press

LANSING, Mich. (AP) — Detroit this week turned down 6,200 doses of the newly authorized Johnson & Johnson coronavirus vaccine, with Mayor Mike Duggan favoring shots from Pfizer and Moderna for now.

"Johnson & Johnson is a very good vaccine. Moderna and Pfizer are the best," he said Thursday. "And I am going to do everything I can to make sure that residents of the city of Detroit get the best."

Duggan's comments conflicted with guidance from top state and federal health officials.

Home / News / Health News

## Feds: Detroit Mayor Didn't Reject Johnson & Johnson Vaccine

Reports that the Detroit mayor had rejected Johnson & Johnson vaccine doses based on its efficacy underscore a perception officials are trying to combat.

By Chelsea Cirruzzo, Staff Writer · March 5, 2021



WHITE HOUSE OFFICIALS on Friday knocked down a report that the mayor of Detroit was rejecting Johnson & Johnson coronavirus vaccine doses over concerns about their efficacy and reiterated that the vaccine is highly effective.

The reports out of Detroit underscore a key concern public officials are trying to combat: the perception that the J&J shot, which is administered in one dose, is less effective than its counterparts, which require two.

The Detroit Free Press reported Thursday that Detroit had declined 6,200 doses of Johnson & Johnson's vaccine after Mayor Mike Duggan said he wanted to protect Detroiters with a 95% effective vaccine, referring to Pfizer and Moderna's vaccines.

"Johnson & Johnson is a very good vaccine. Moderna and Pfizer are the best. And I am going to do everything I can to make sure the residents of the city of Detroit get the best," Duggan said in a press conference Thursday.

However, when asked about Duggan rejection of the doses, senior White House adviser Andy Slavitt said Friday during a coronavirus briefing that those were "not the mayor's comments" and the White House has been in touch with his office.

"In fact, he is very eager for the Johnson & Johnson vaccine," Slavitt said.



# TAKEAWAYS

1

Enthusiasm for travel is on a roll, moving forward nicely again this week.

2

Reported booking behaviors are still muted, but dreaming and planning reached a pandemic record.

3

The proportion of travelers who report that they will wait to get a vaccine before traveling is dropping fast.

4

More travelers report their employers have begun traveling again for business. Many expect changes in business travel policies over the longer-term.

5

Opinions are mixed on recent decisions by governors to fully re-open their states for business right now.





**Enthusiasm for travel is  
on a roll, moving  
forward nicely again  
this week.**

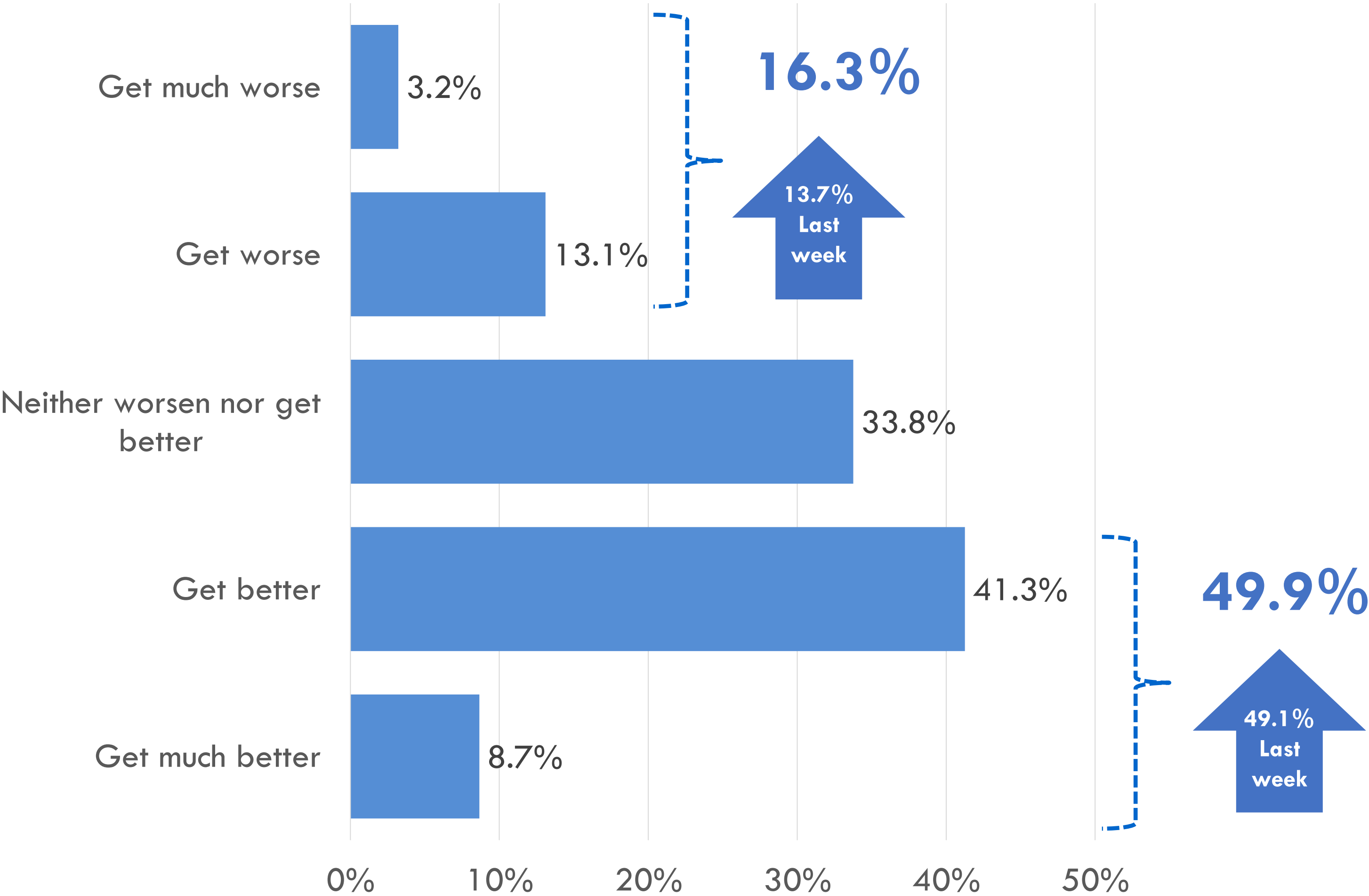


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

**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)

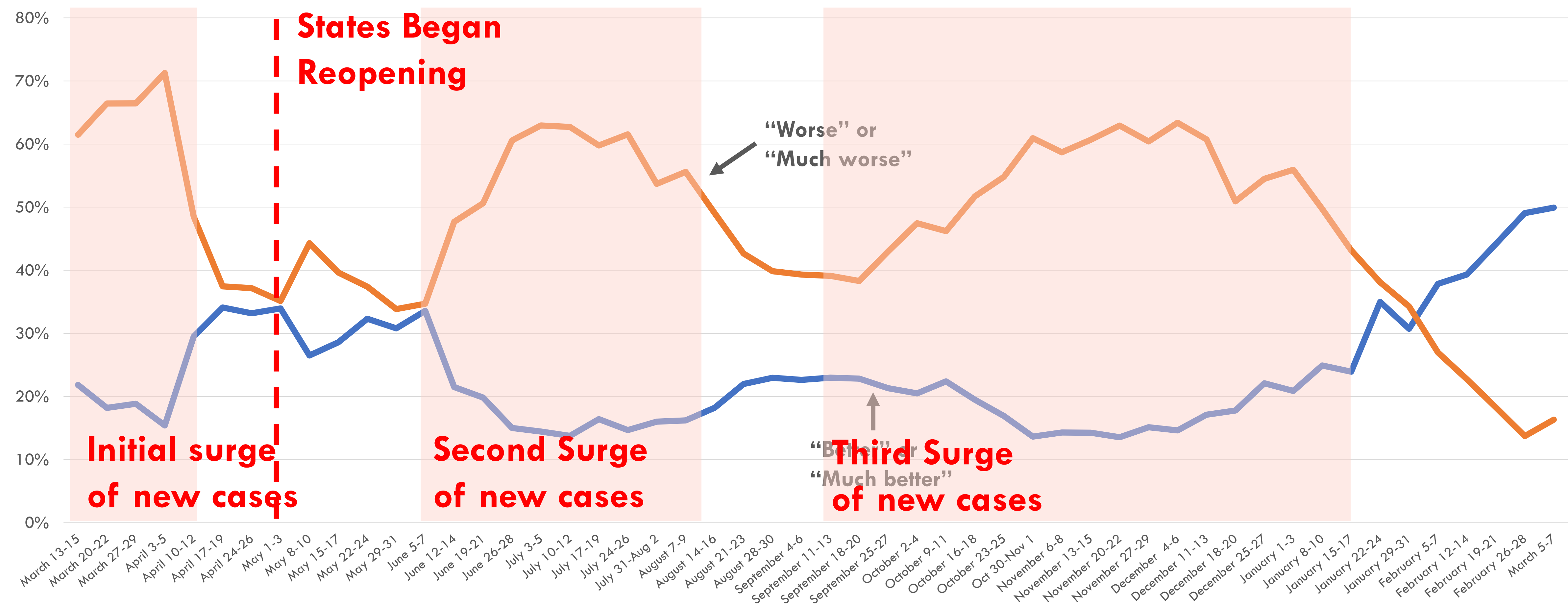
In the next month the coronavirus situation will \_\_\_\_\_

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)





# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (MARCH 2020 - MARCH 2021)



**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 1-52. 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 and 1,209 completed surveys.)

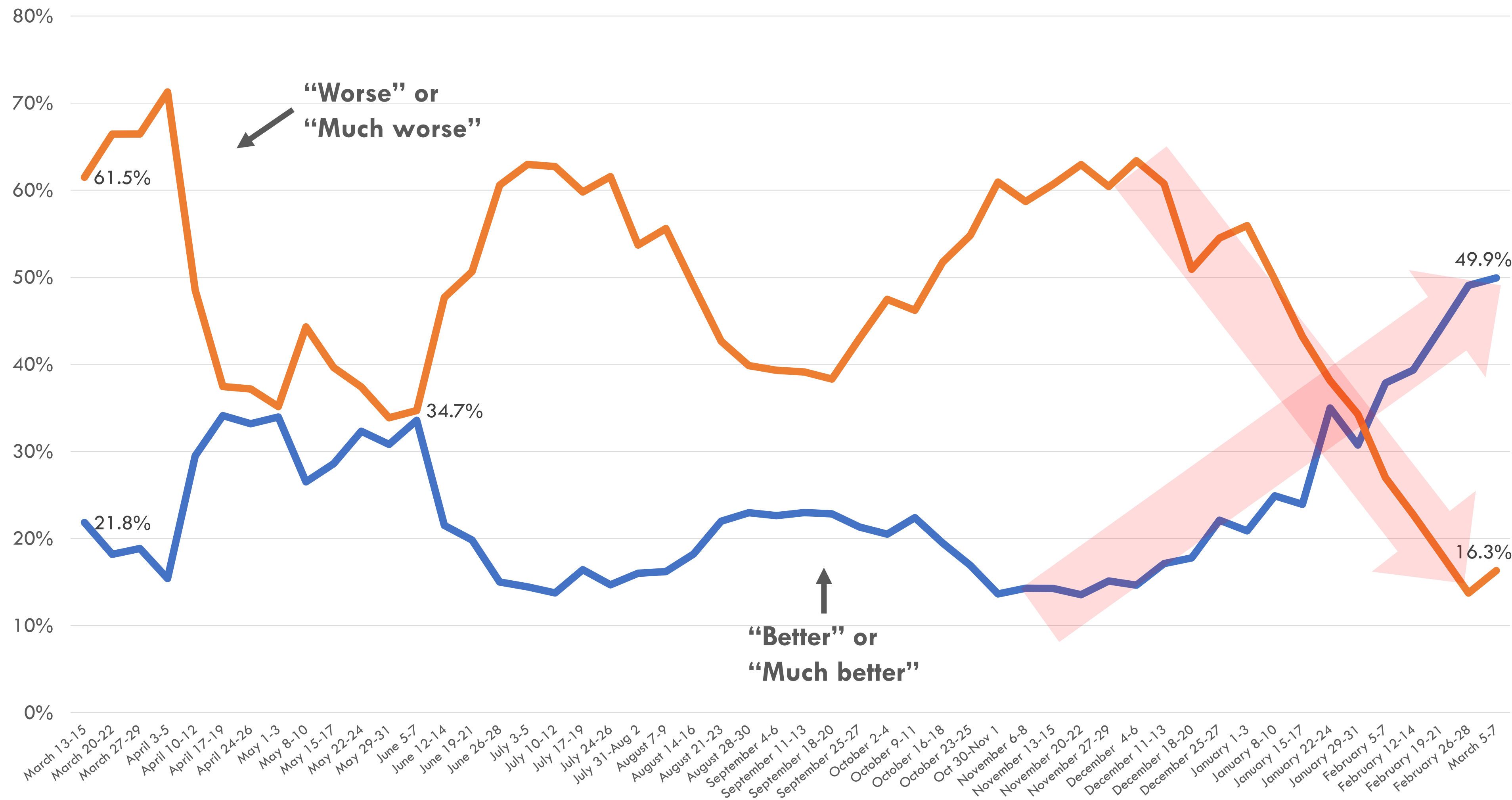


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-52)

**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

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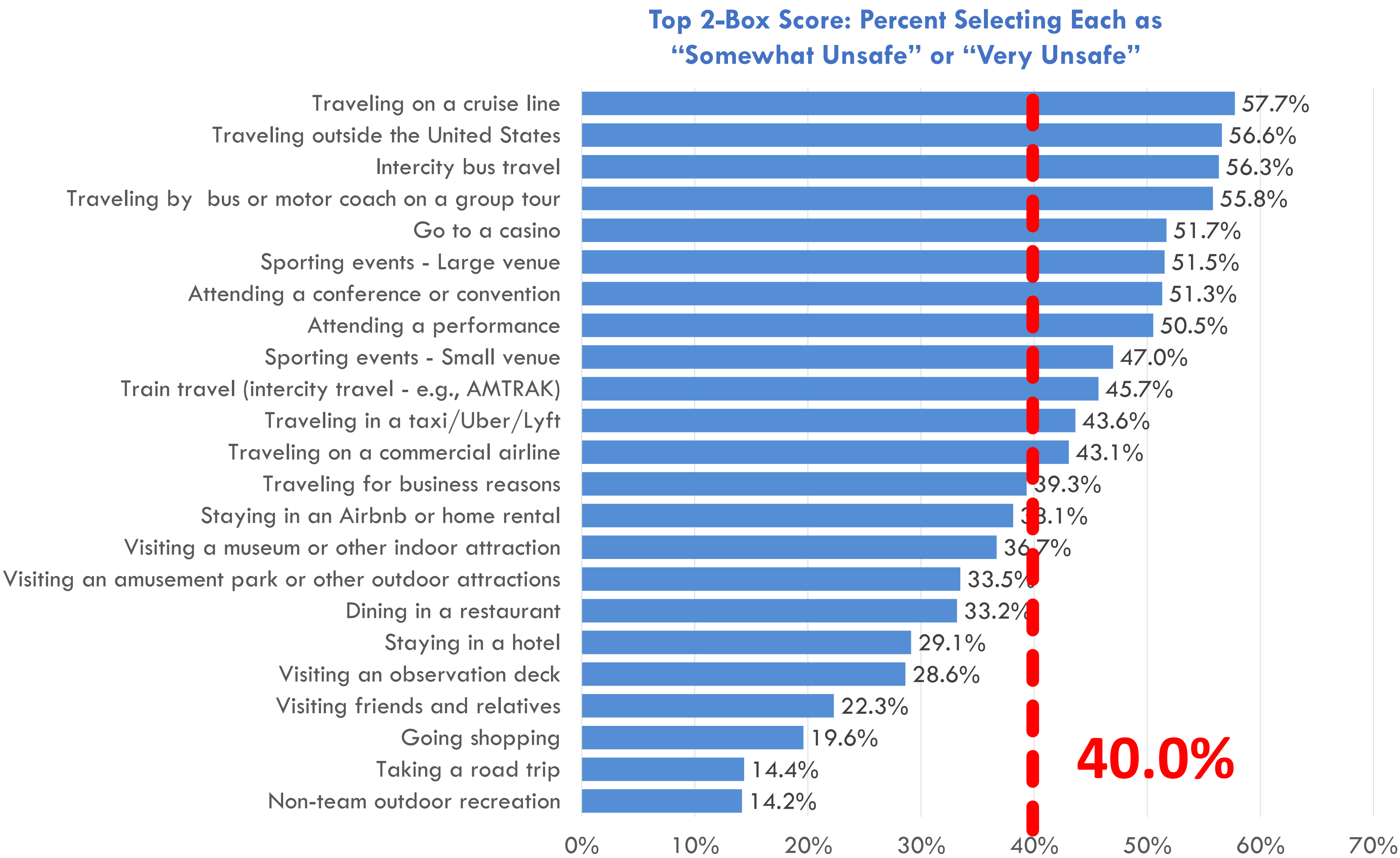




# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 52)

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

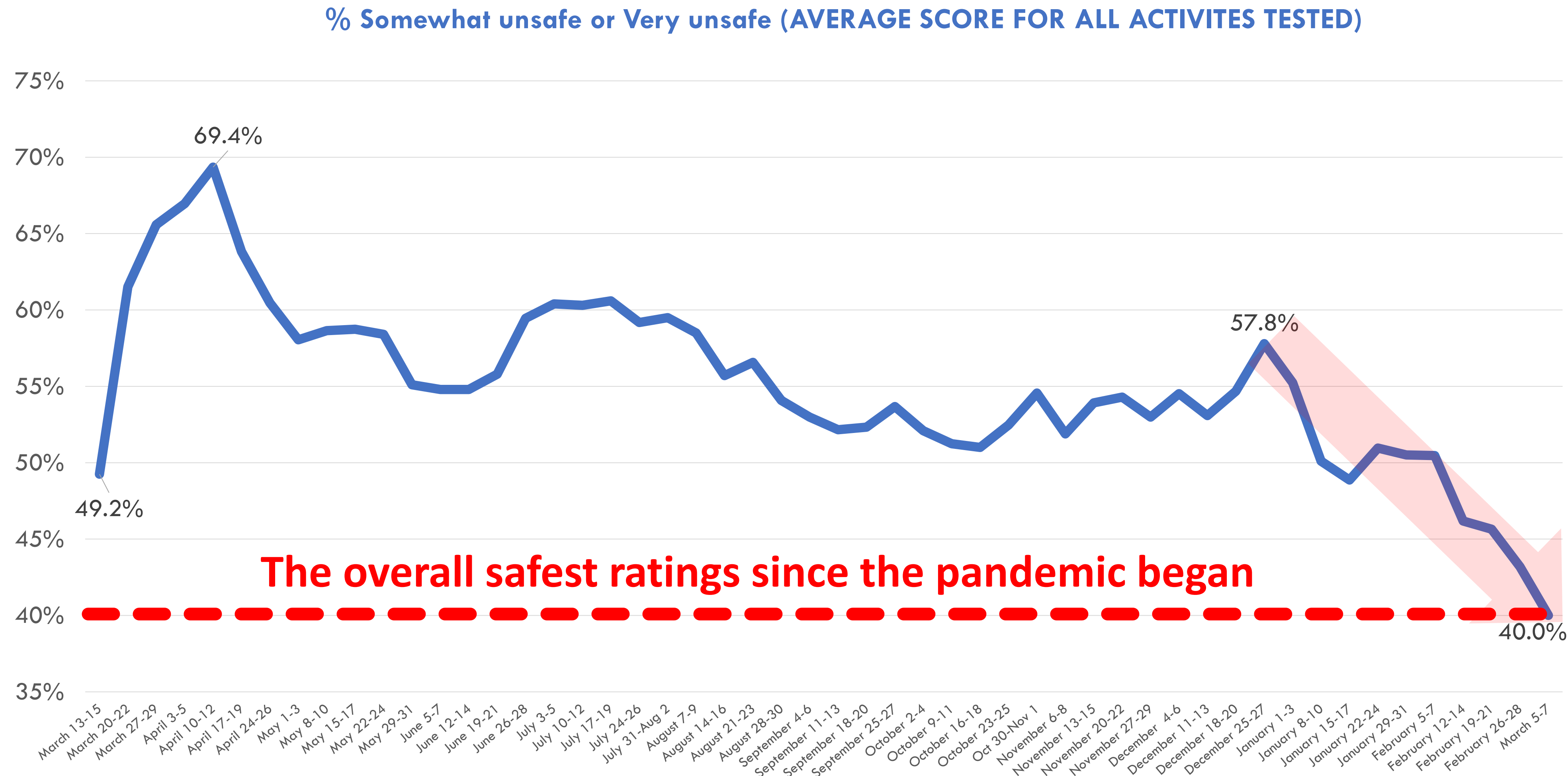
(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)





# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-52 COMPARISON)

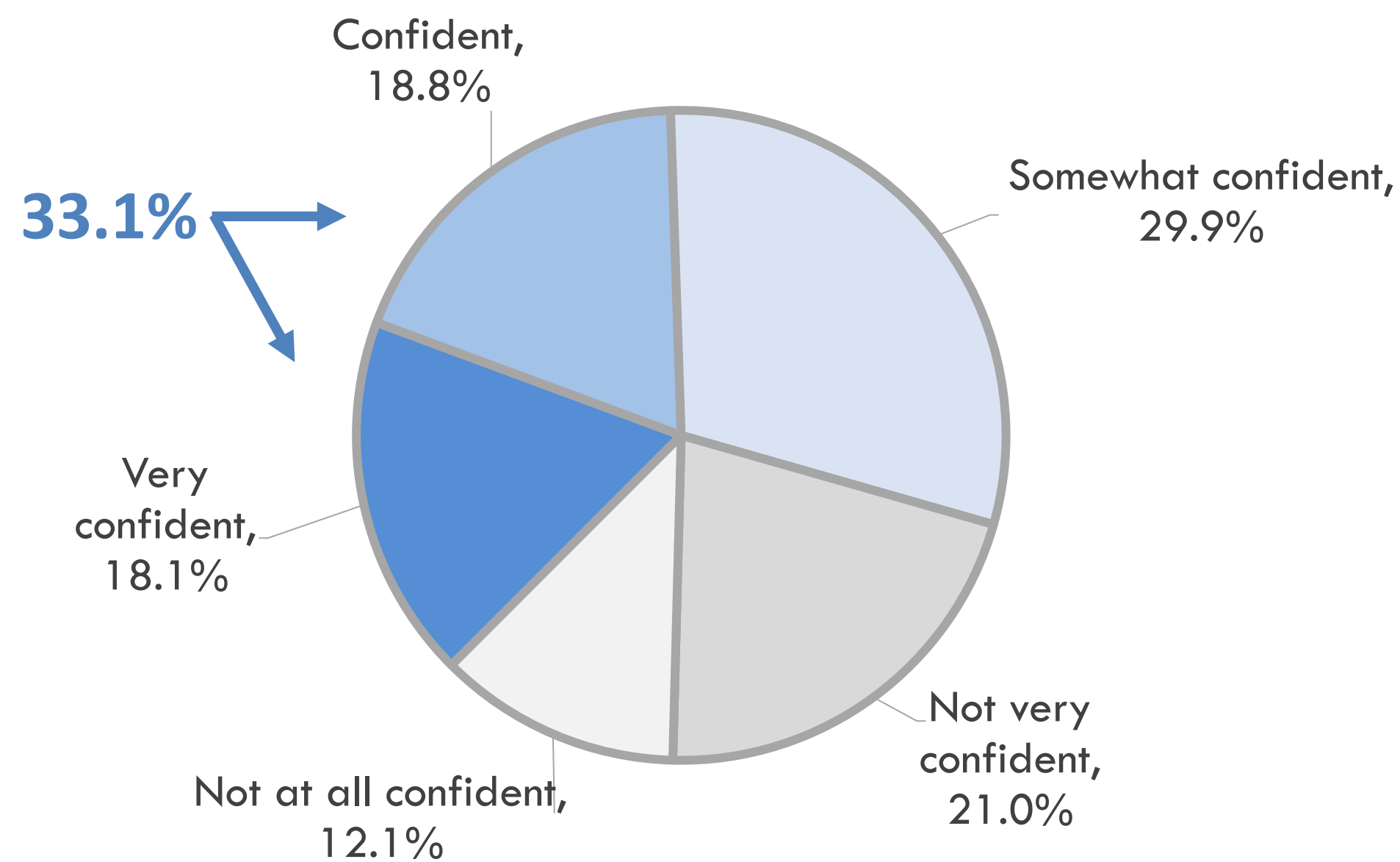
**Question:** At this moment, how safe would you feel doing each type of travel activity?





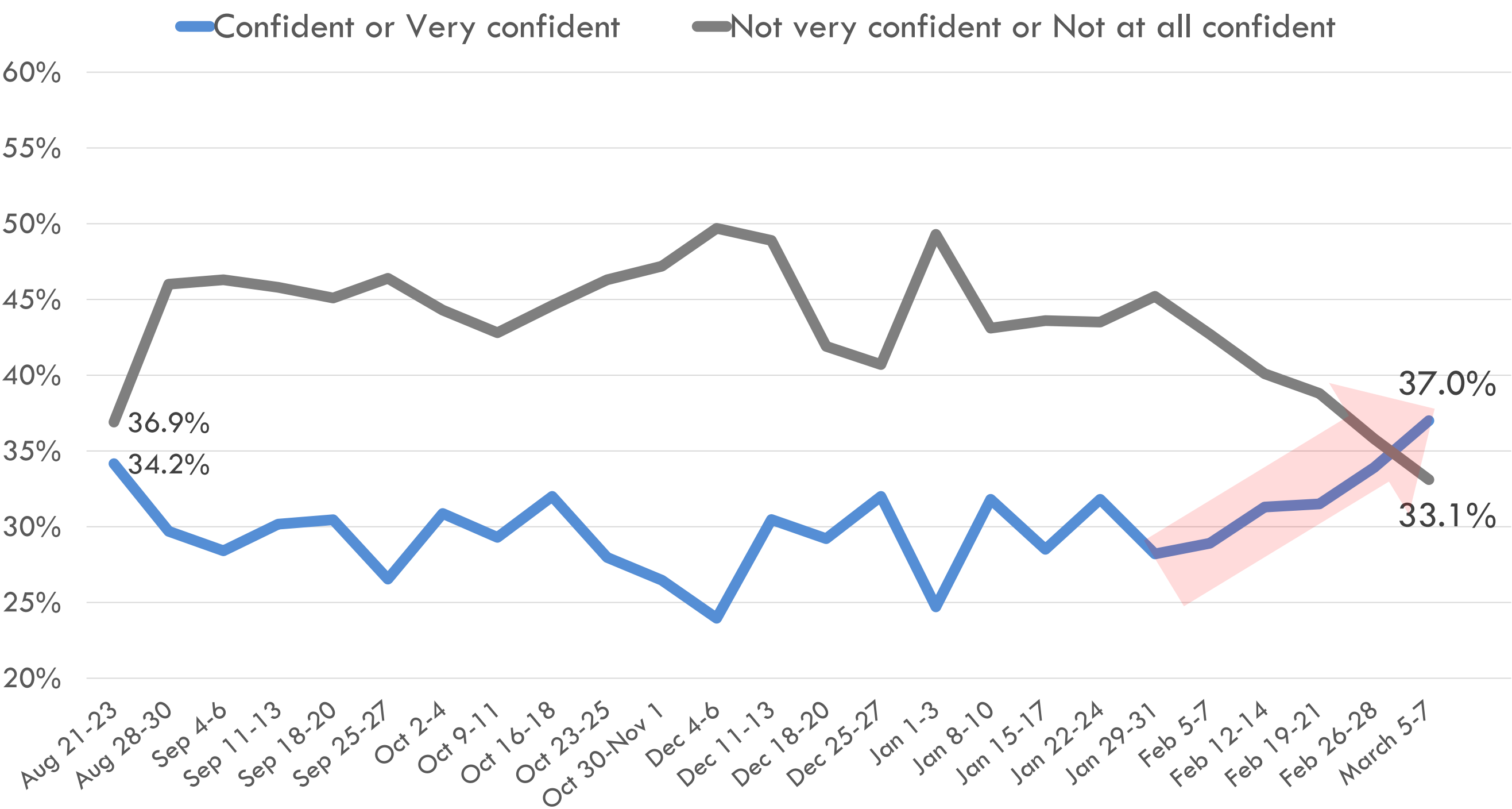
# CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



(Base: Wave 24-34 and 39-52 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, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204 and 1,209 completed surveys.)

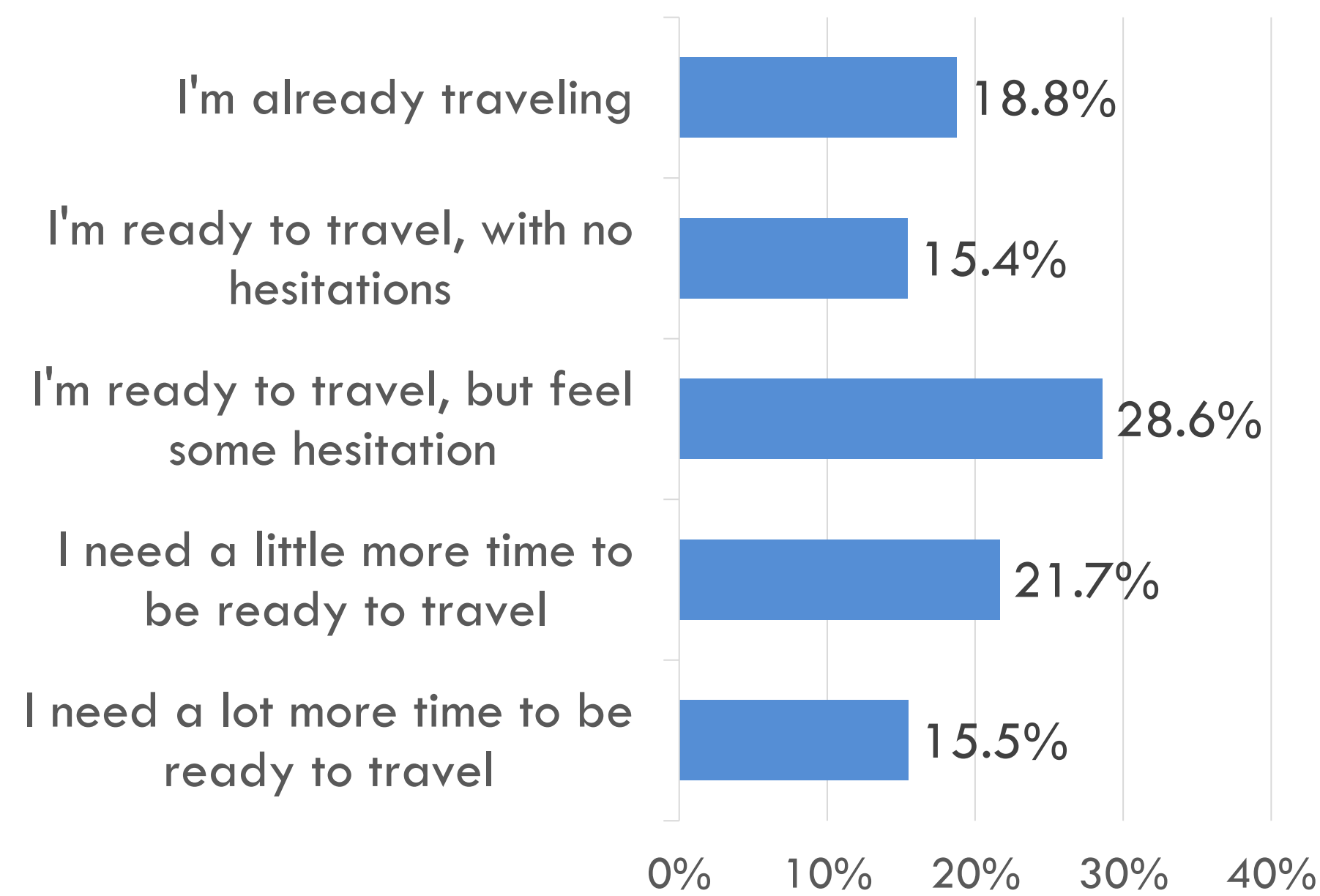
## Historical data





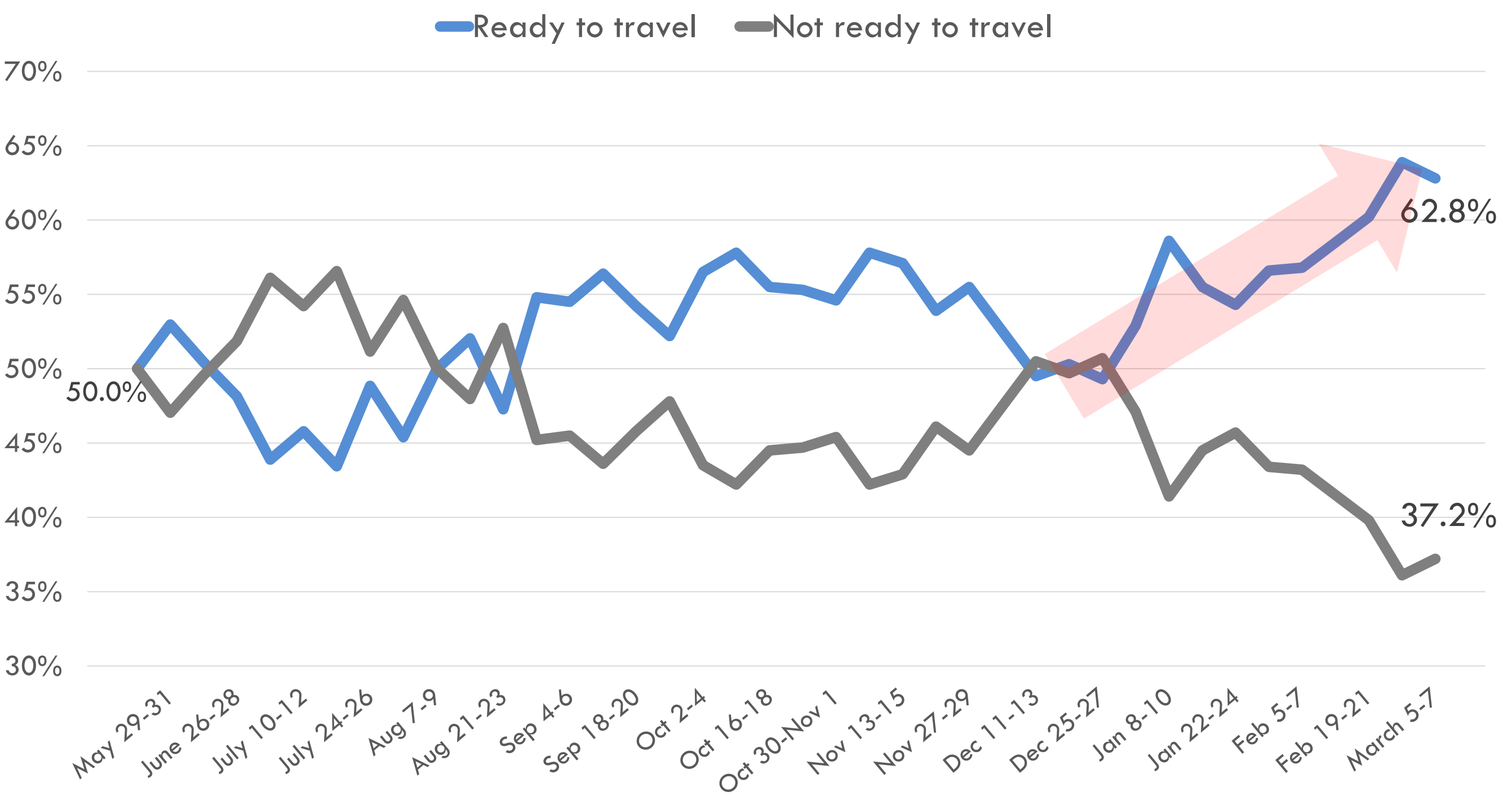
# TRAVEL STATE-OF-MIND

**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 15-52. 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, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204 and 1,209 completed surveys.)

## Historical data

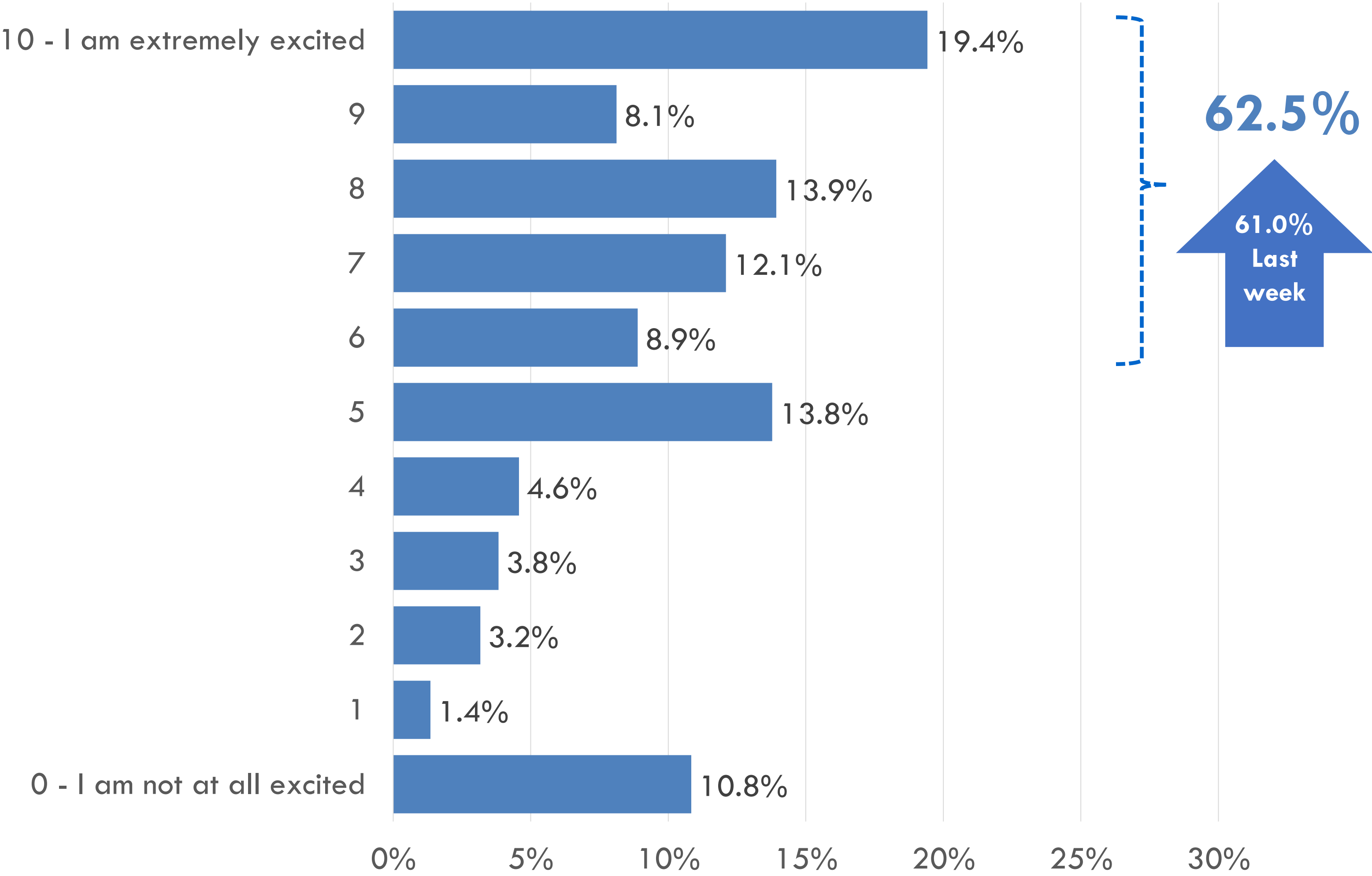




# EXCITEMENT FOR LEISURE TRAVEL IN 2021

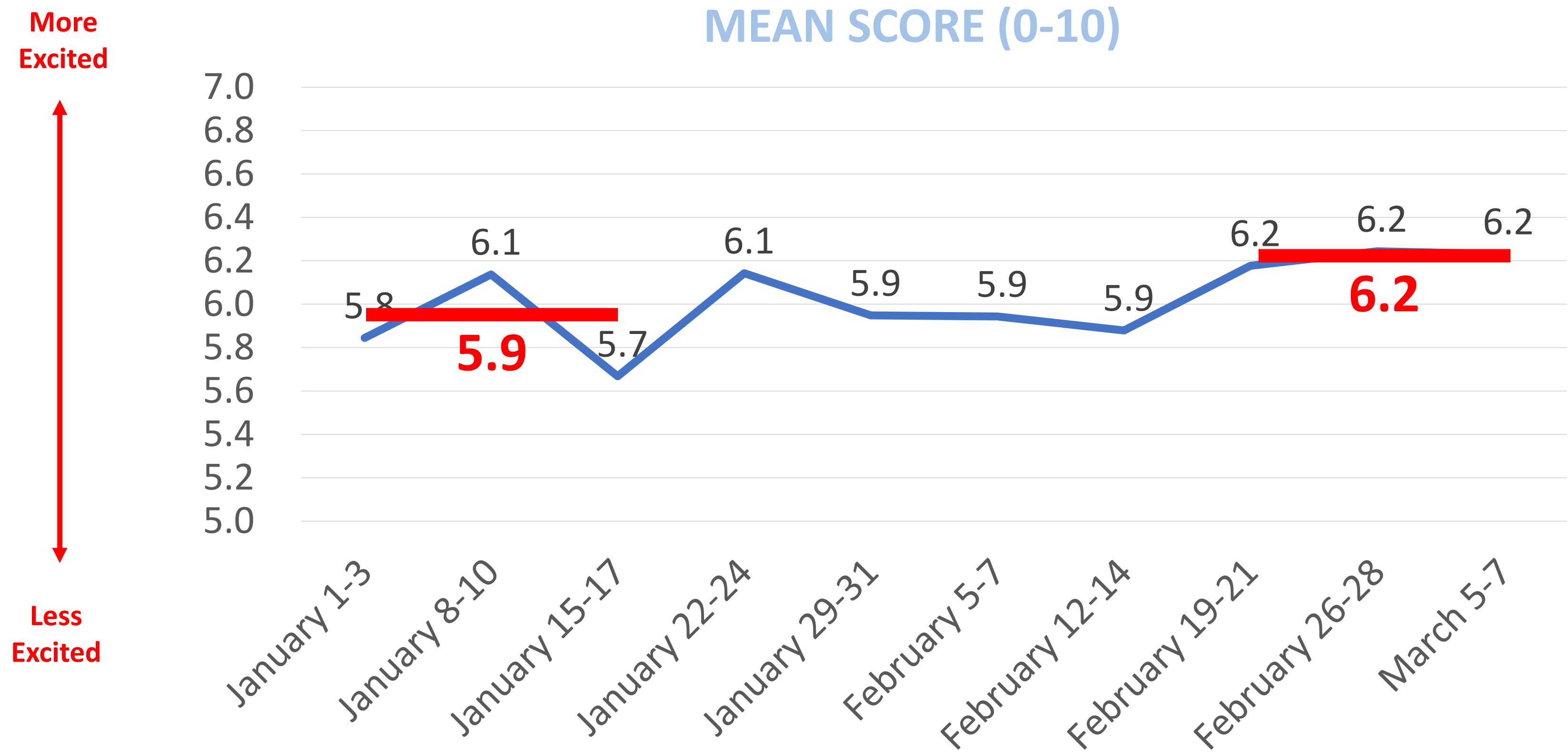
**Question:** Which best describes how excited you are about LEISURE TRAVEL in this year (2021)? (Please answer using the 11-point scale below)

*(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 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)



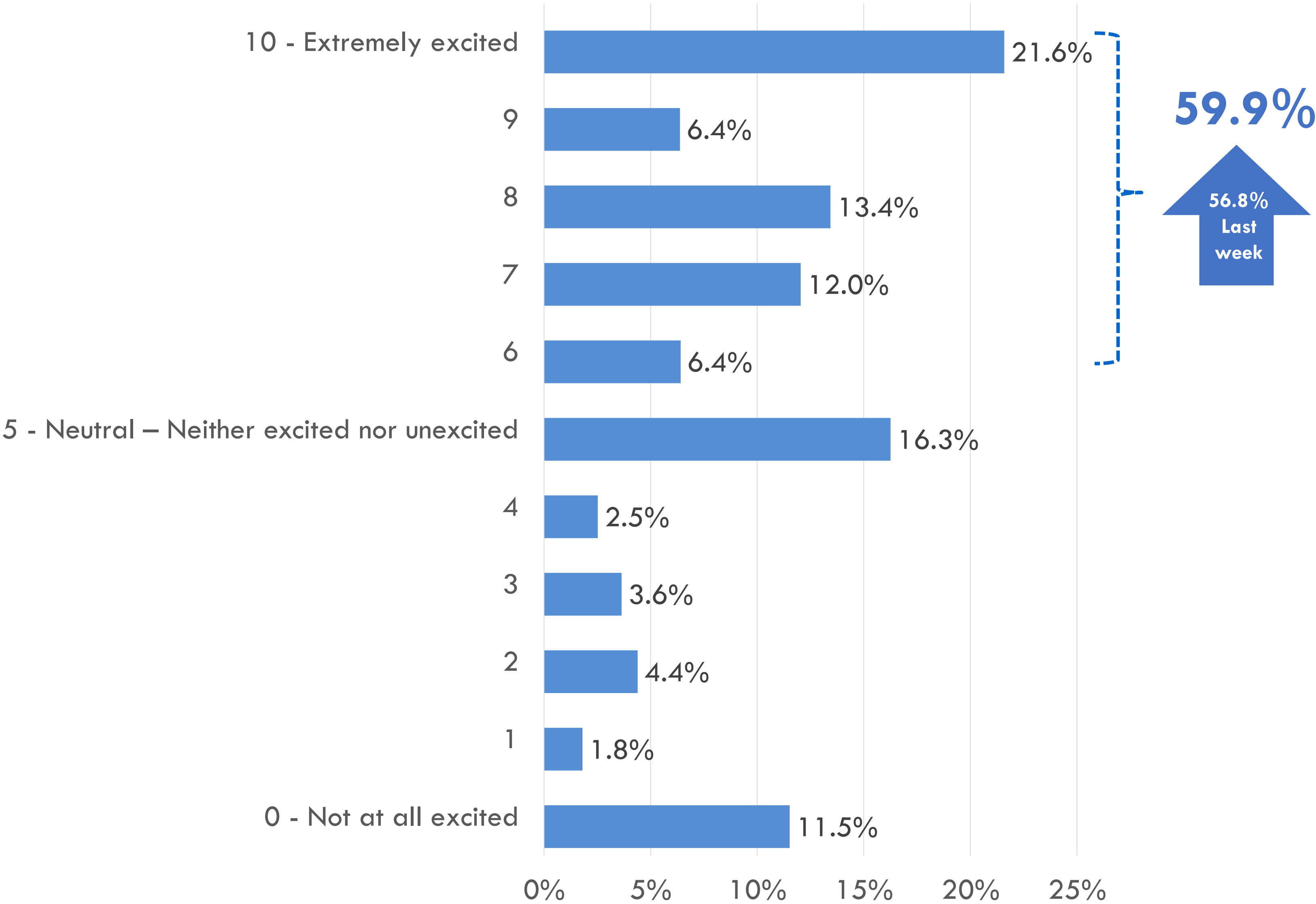


# EXCITEMENT TO TRAVEL NOW

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

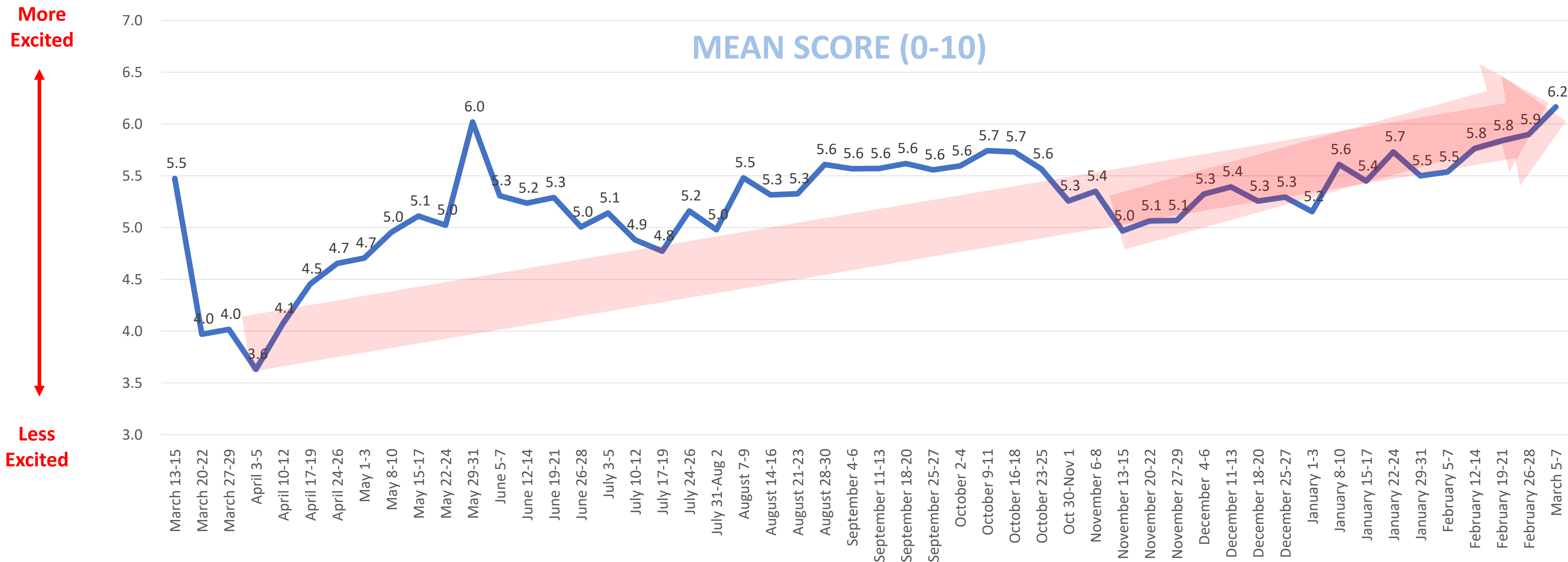
How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 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 getaway is to a place you want to visit)

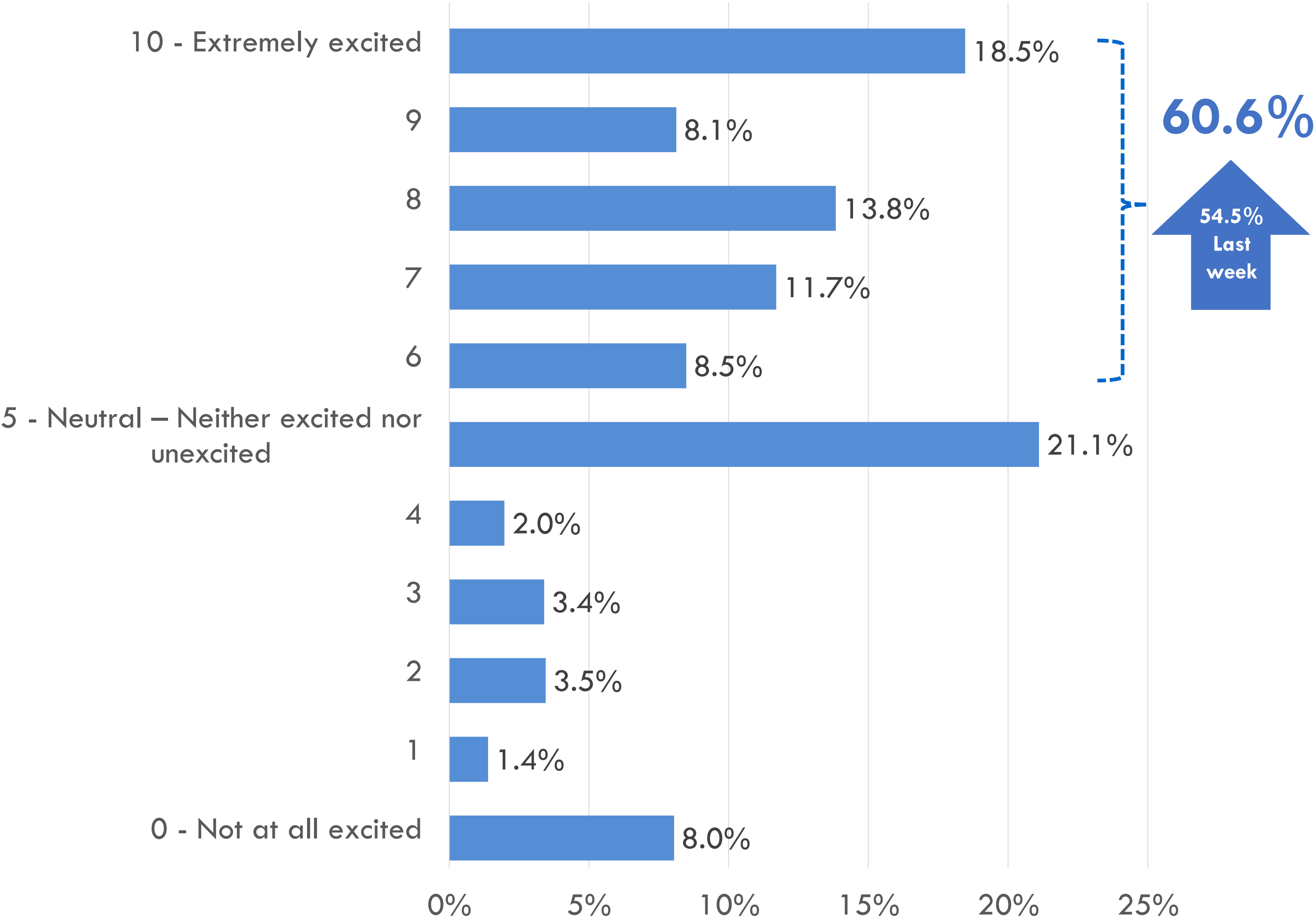




# OPENNESS TO TRAVEL INSPIRATION

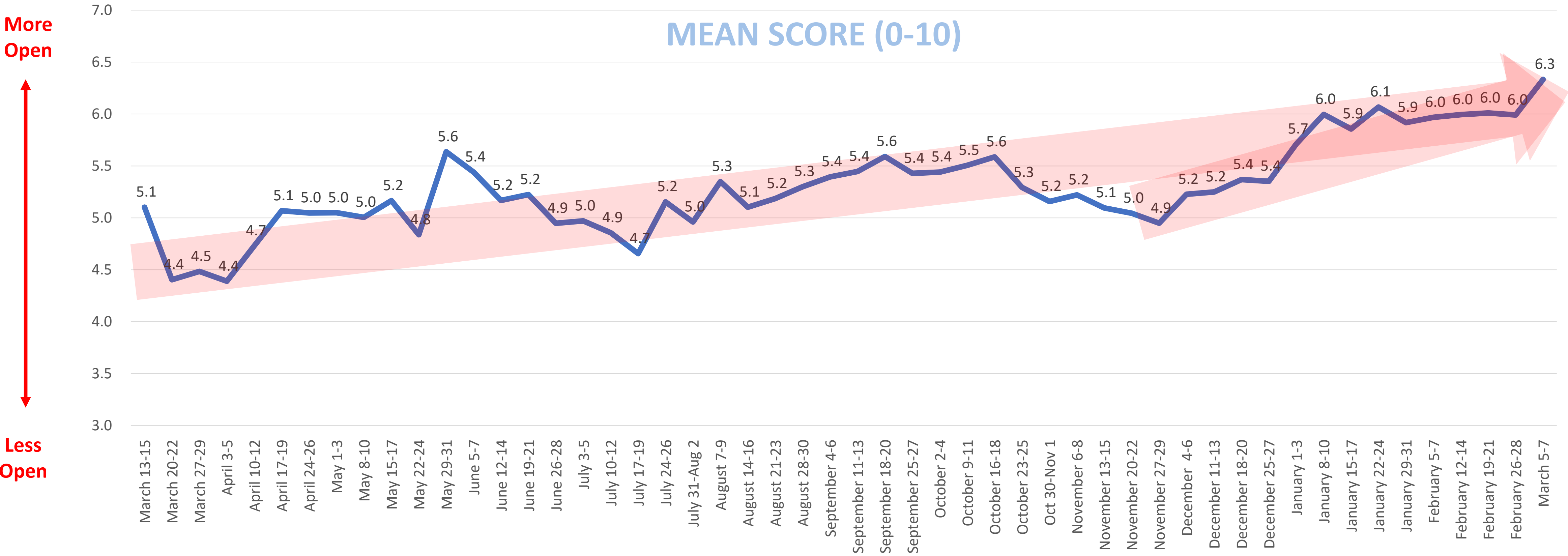
**Question:** At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)



# OPENNESS TO TRAVEL INSPIRATION

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

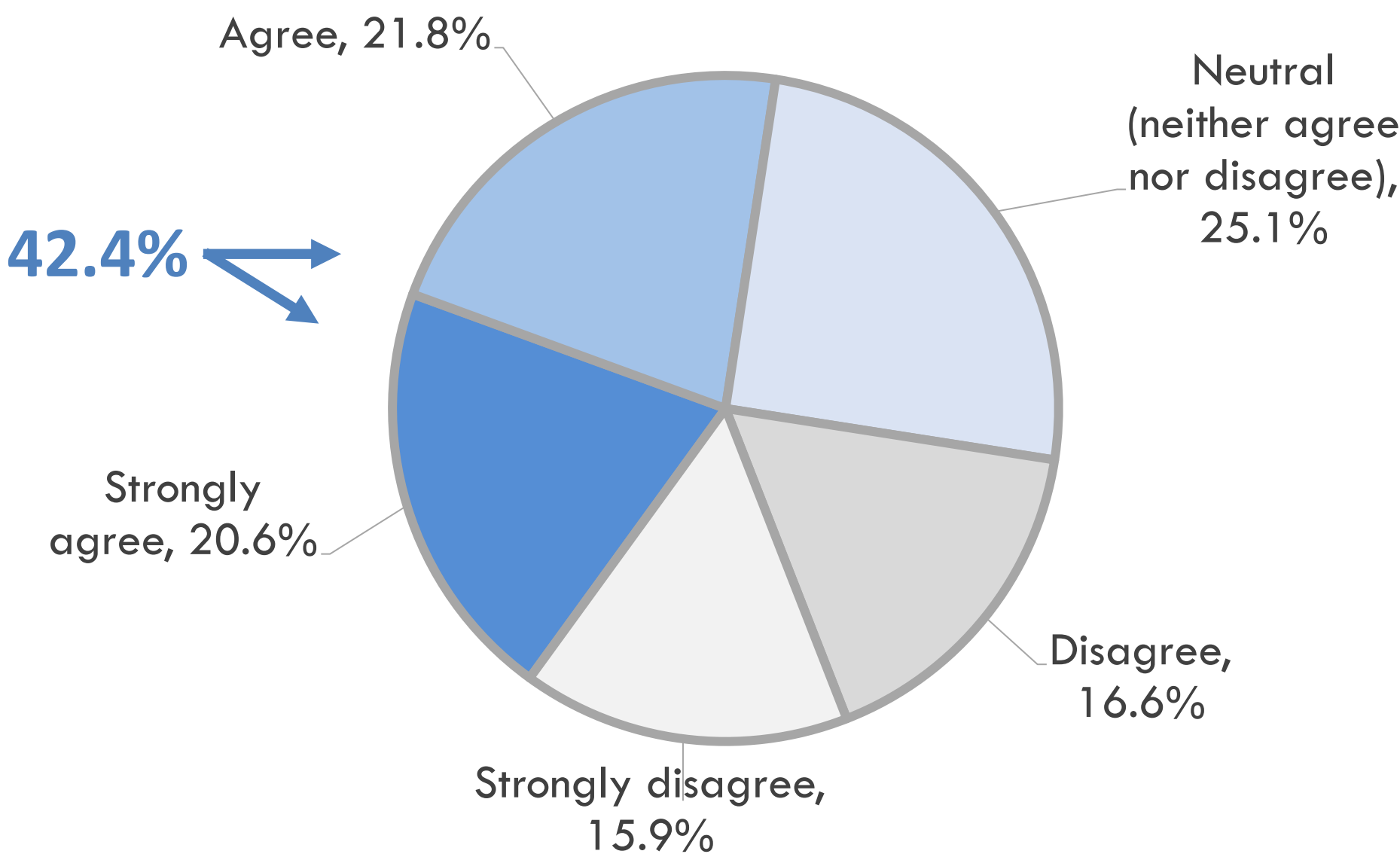




# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

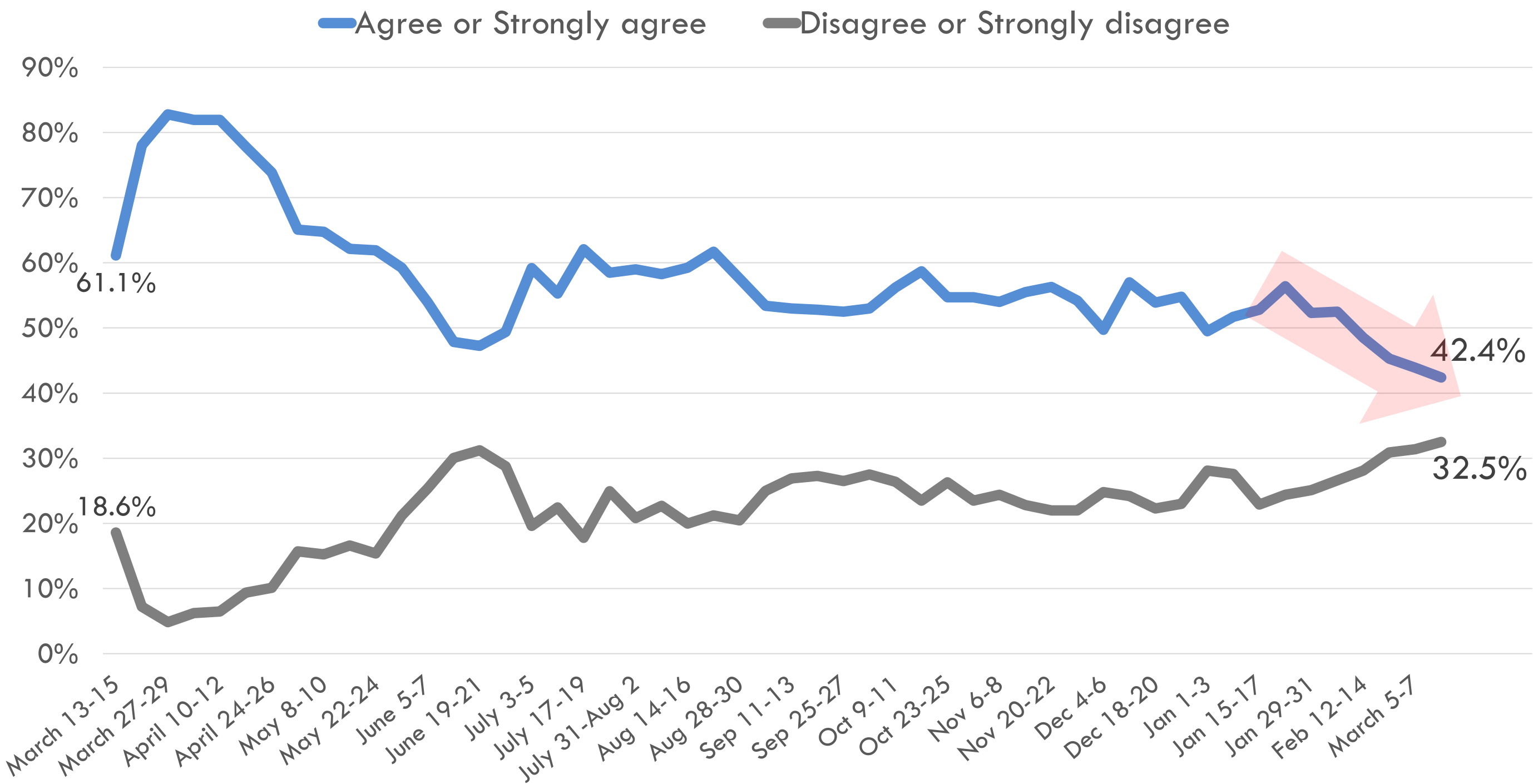
How much do you agree with the following statement?

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



(Base: Waves 1-52. 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 and 1,209 completed surveys.)

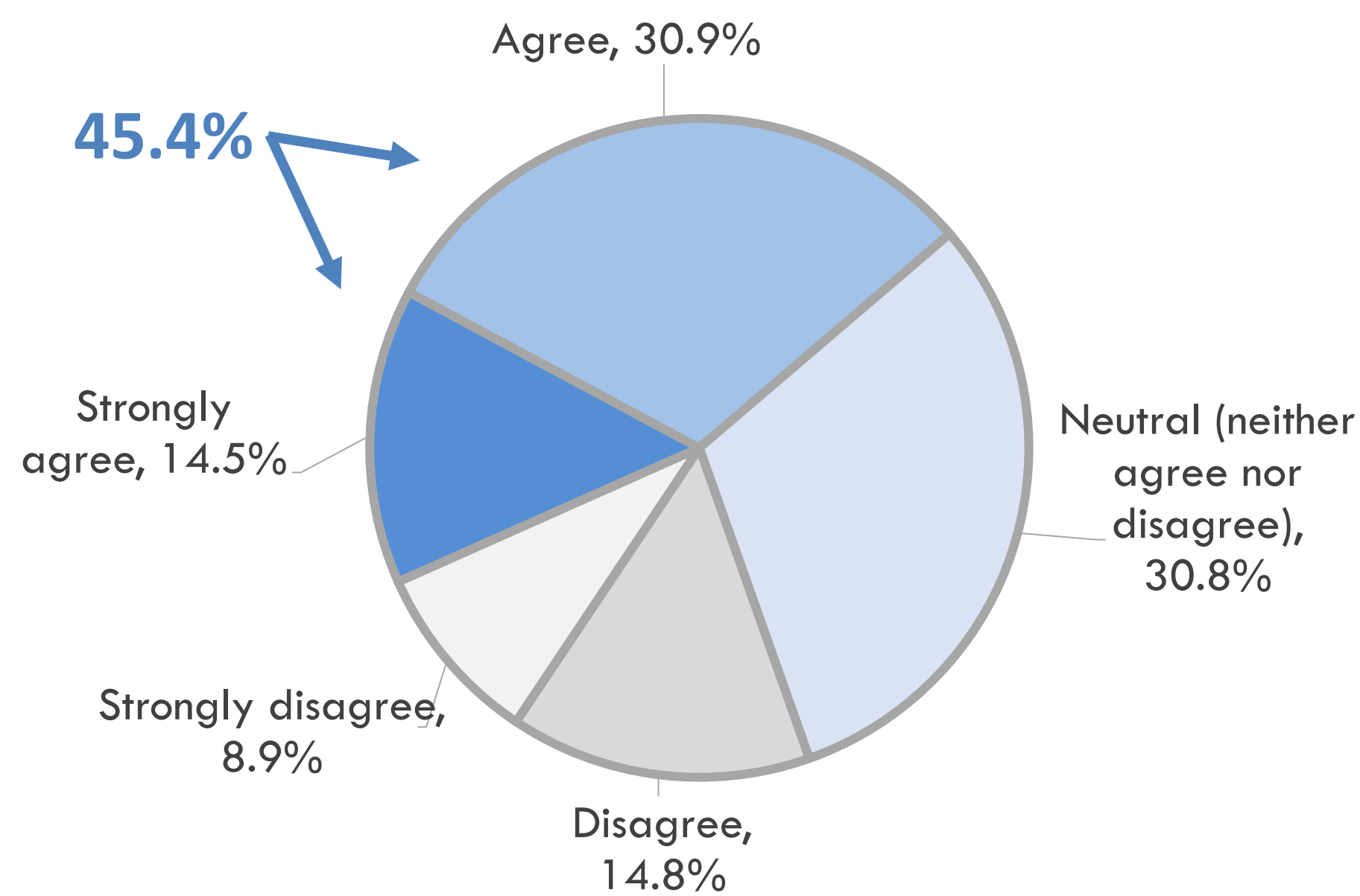
## Historical data



# DISCOUNTS AND PRICE CUTS

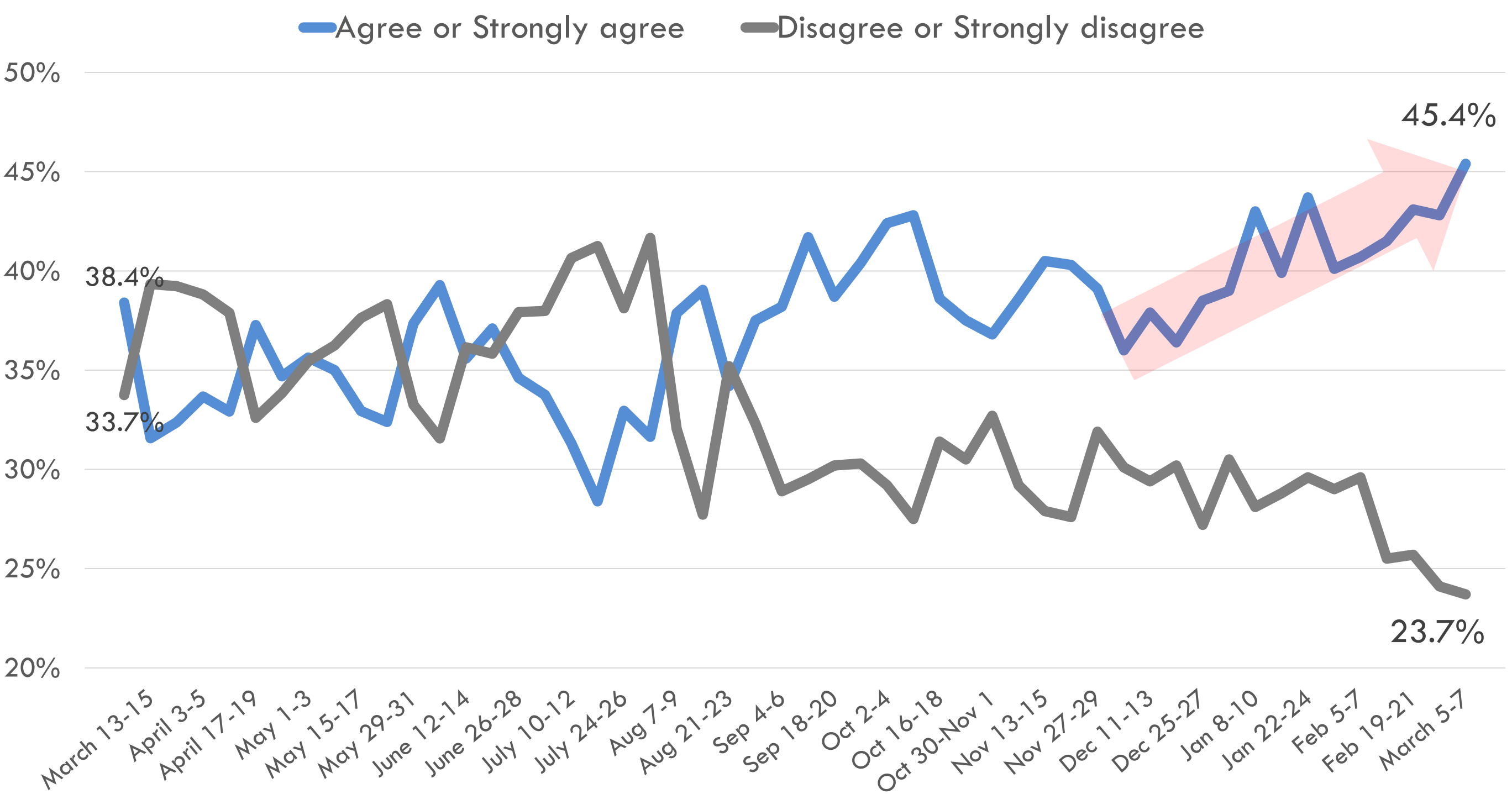
How much do you agree with the following statement?

**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 1-52. 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 and 1,209 completed surveys.)

Historical data

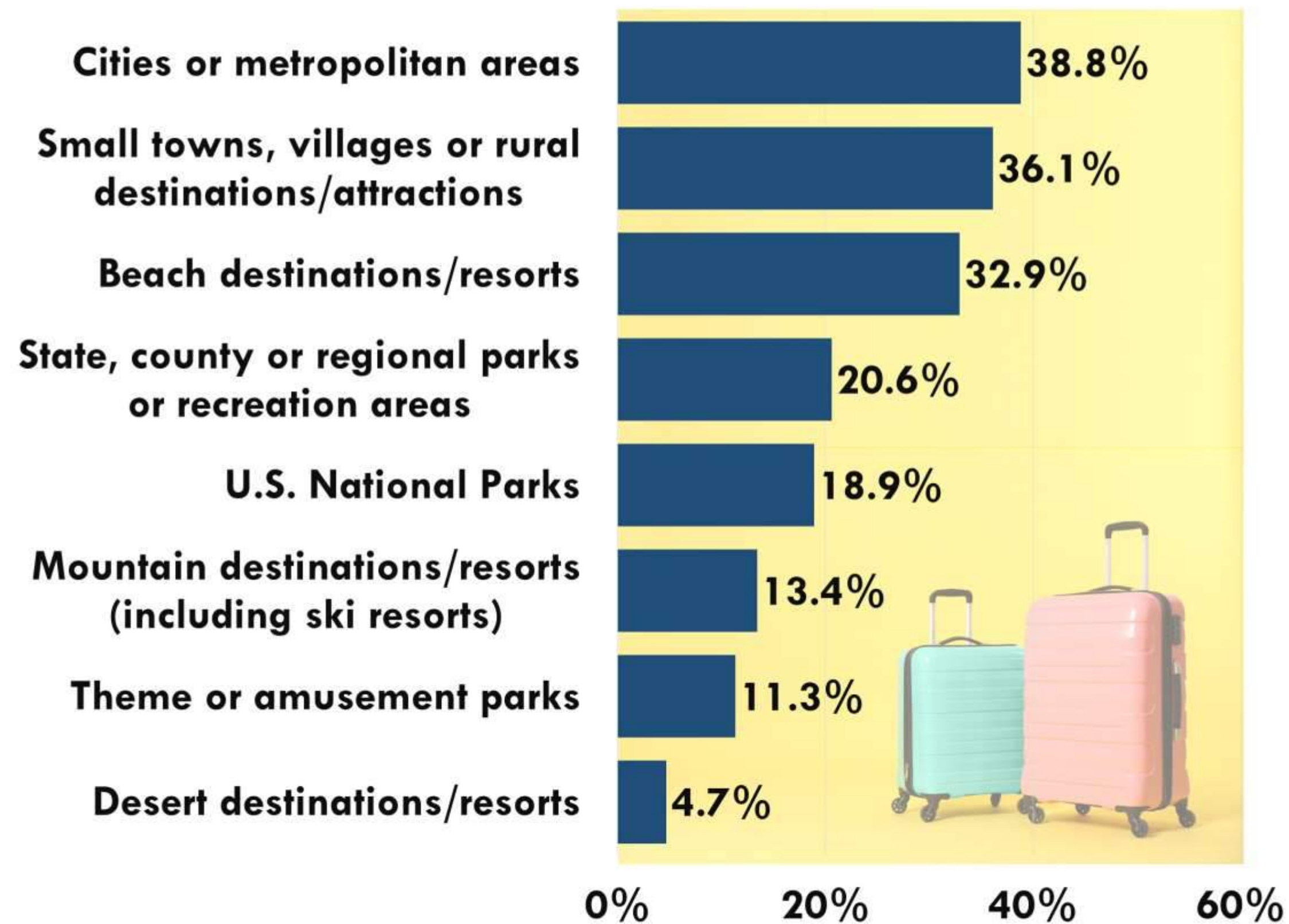




# TRACKING URBAN TOURISM RECOVERY

## AS OF MARCH 7, 2021

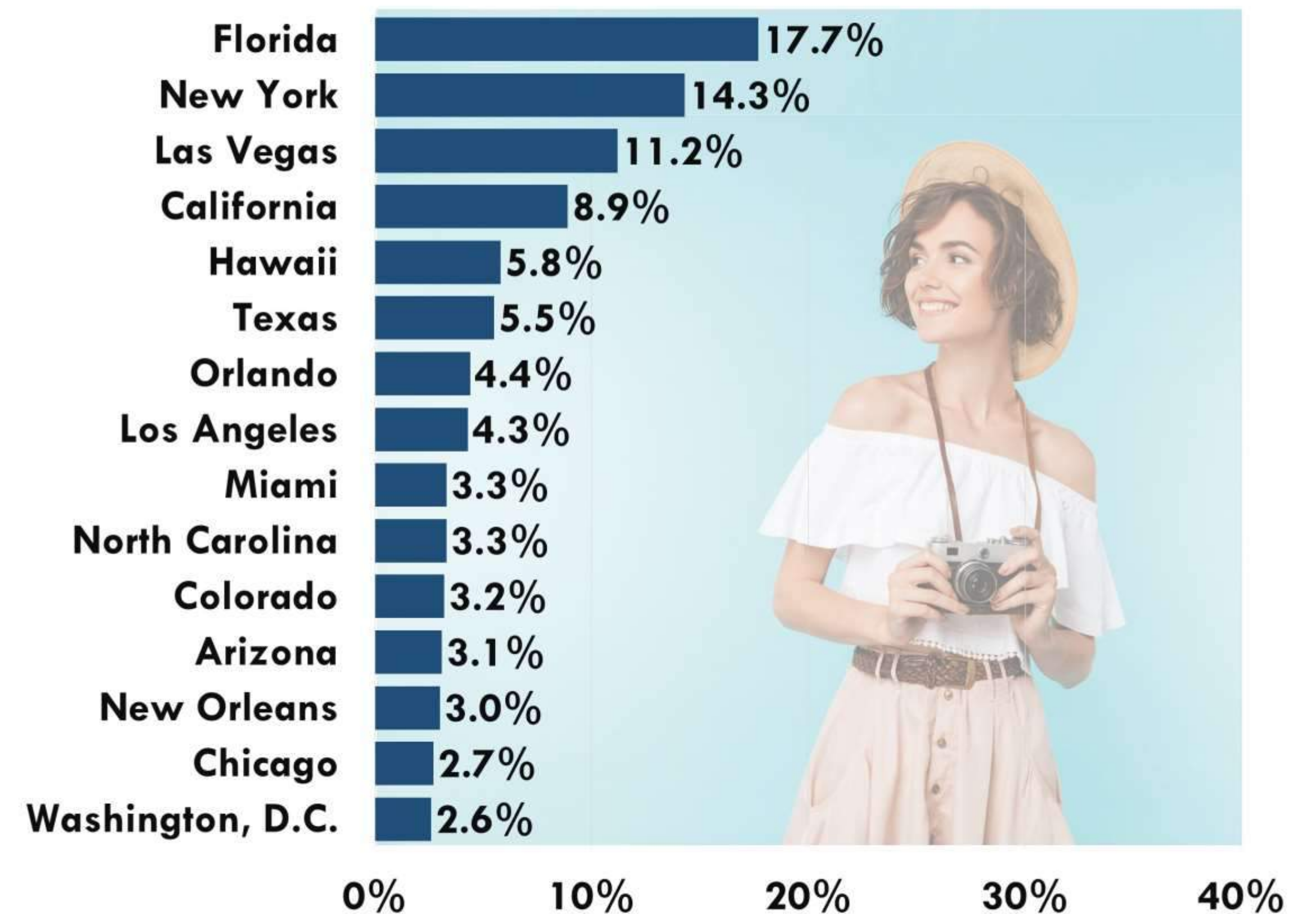
### DESTINATION TYPES AMERICANS WILL VISIT IN NEXT THREE MONTHS



**QUESTION: ON THESE LEISURE TRIPS, WHICH OF THE FOLLOWING ARE YOU EXPECTING TO VISIT?**

(Base: Wave 52 data. Respondents who expect to take a leisure trip during the next three months, 712 completed surveys. Data collected March 5-7, 2021)

### MOST DESIRED DOMESTIC DESTINATIONS THIS YEAR



**QUESTION: WHICH DOMESTIC DESTINATIONS DO YOU MOST WANT TO VISIT THIS UPCOMING YEAR? (WRITE IN UP TO THREE)**

(Base: Wave 52 data. All respondents, 1,206 completed surveys. Data collected March 5-7, 2021)



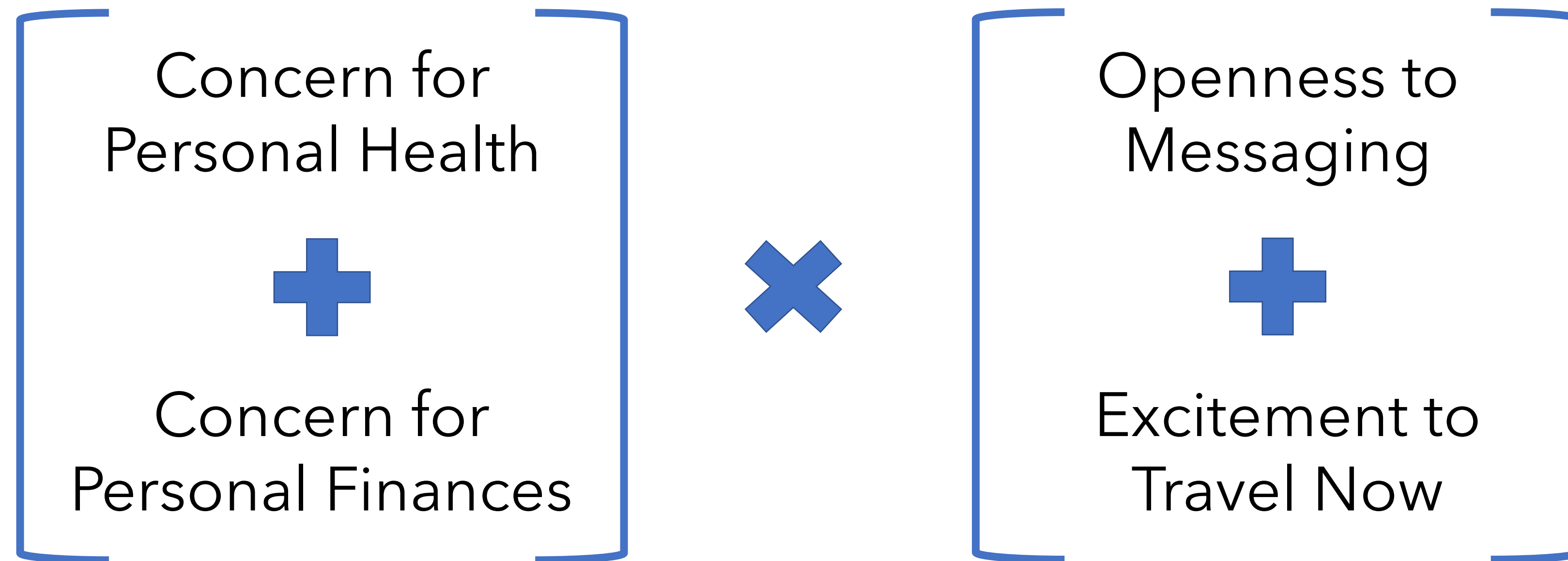


# Coronavirus Travel Sentiment Index

## Measuring the Potential Influence of Travel Marketing

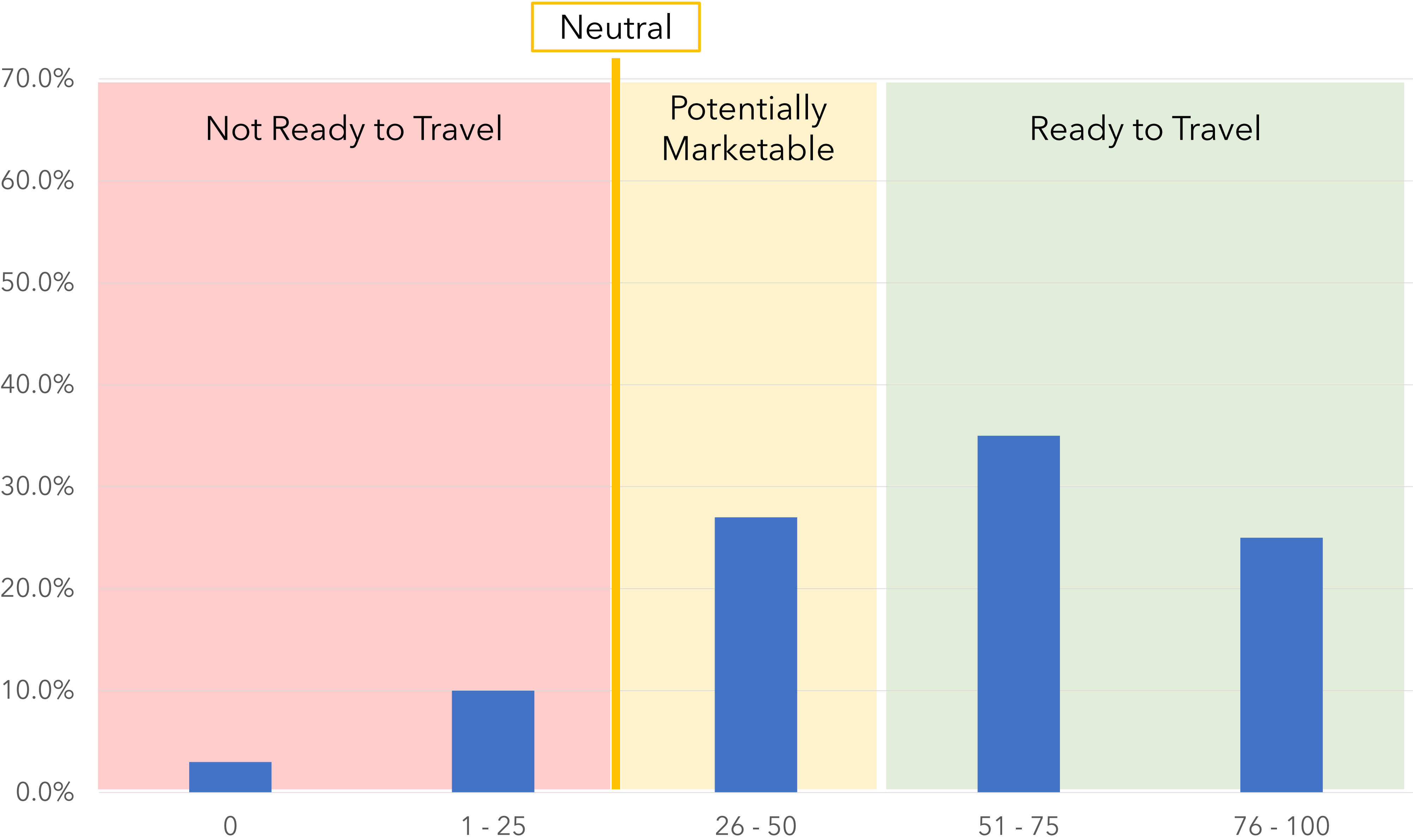


# Predictive Index Formula



\*Normalized to a 100pt scale

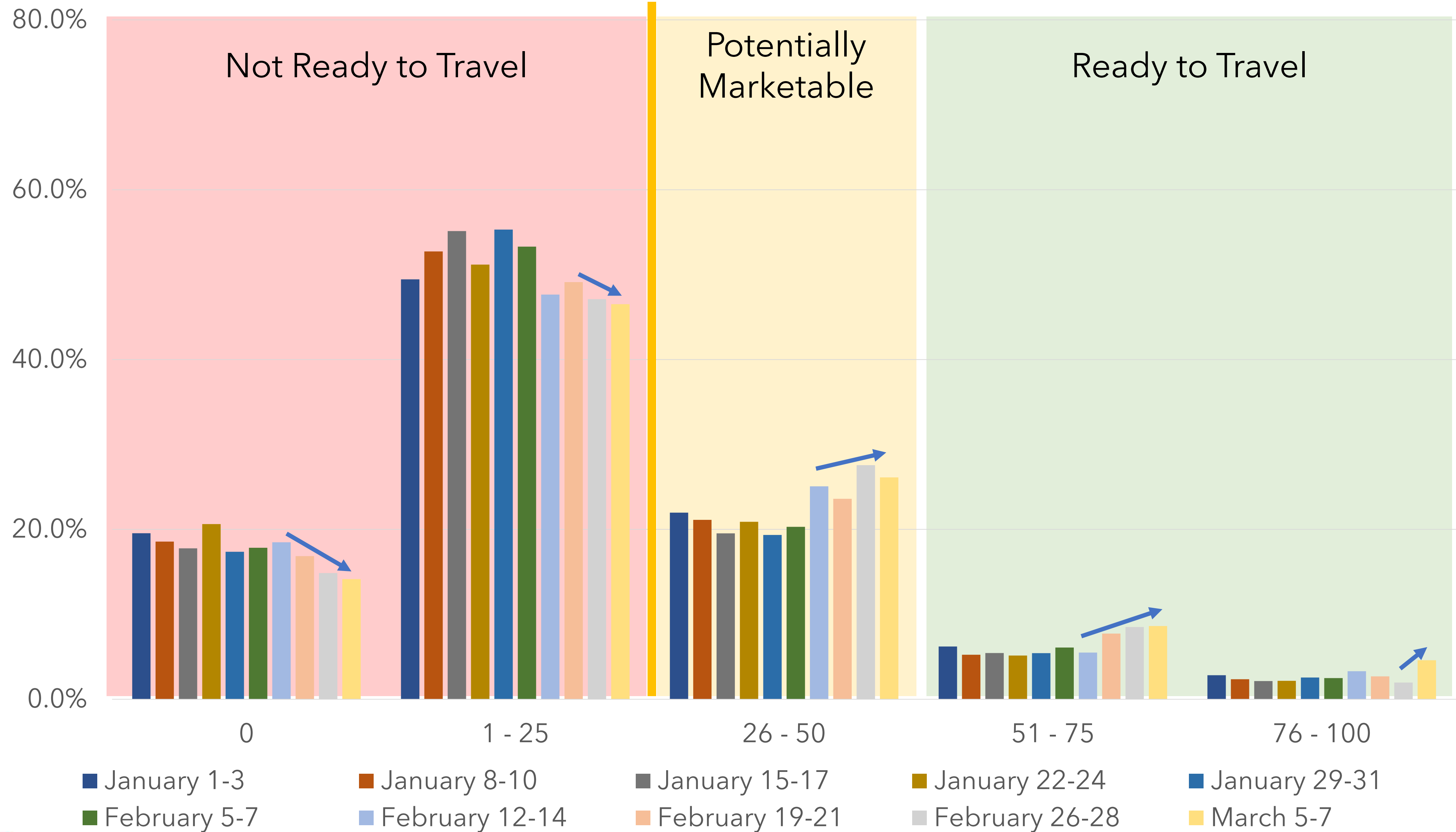
# Healthy Travel Outlook

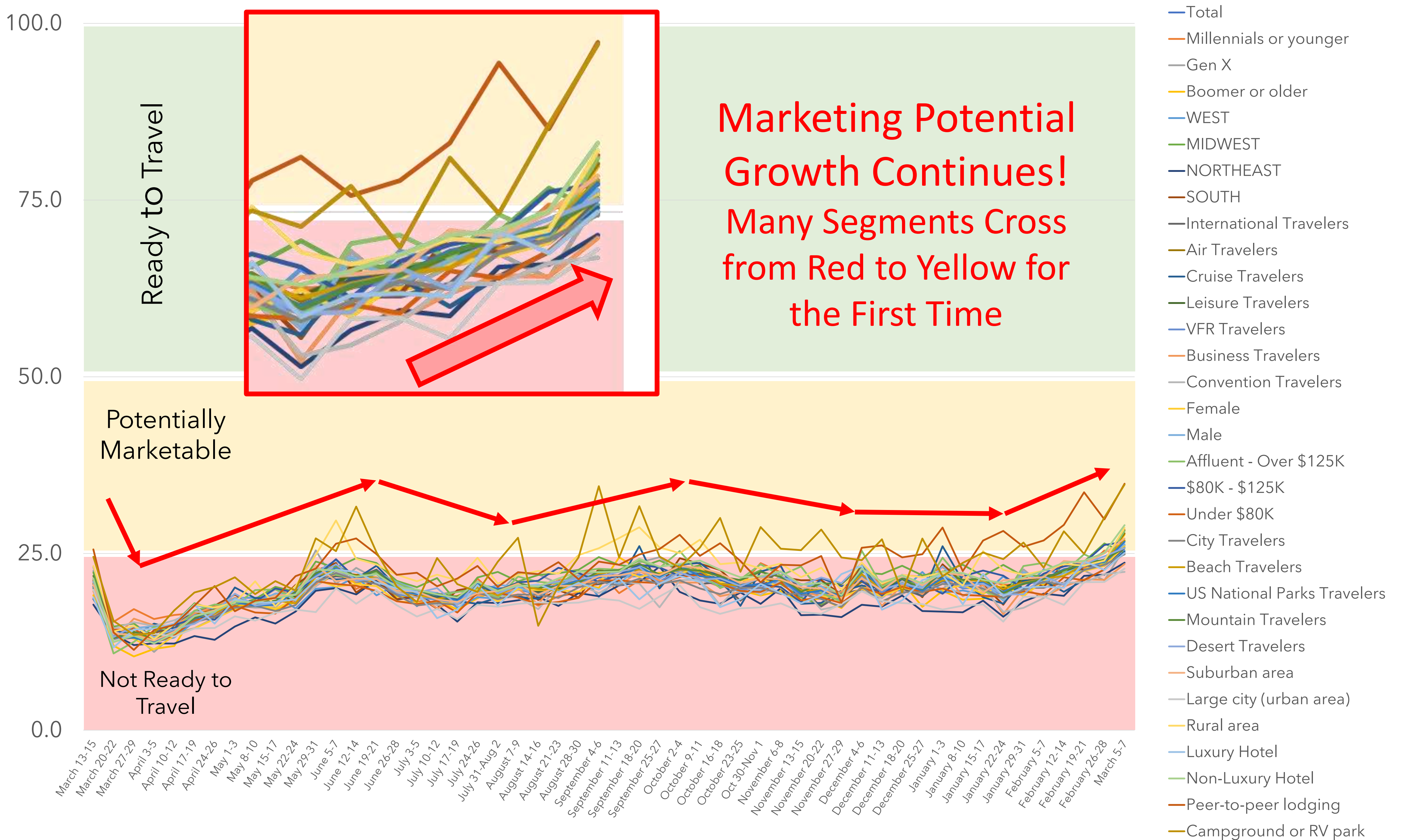




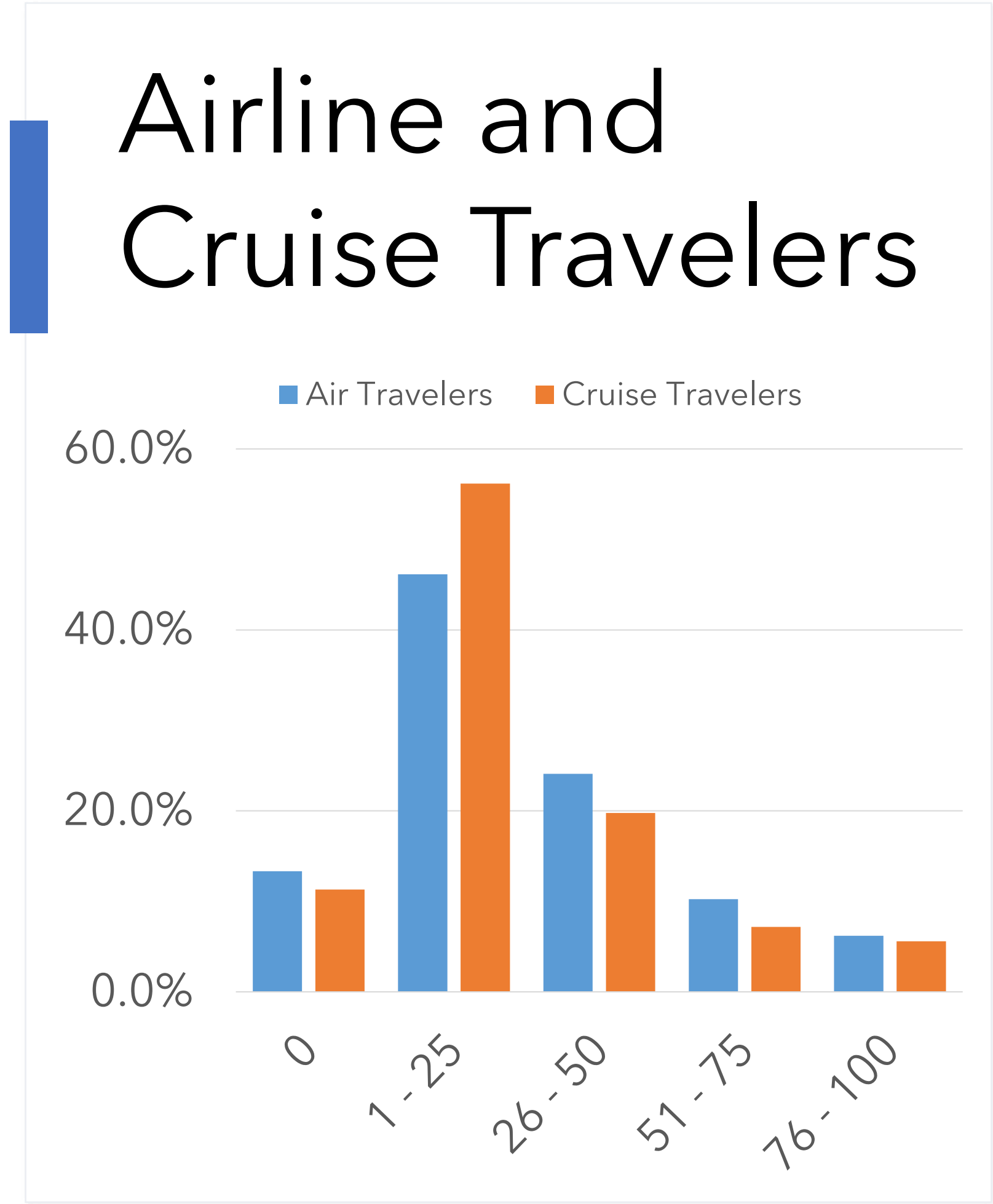
# Travel Outlook

Neutral

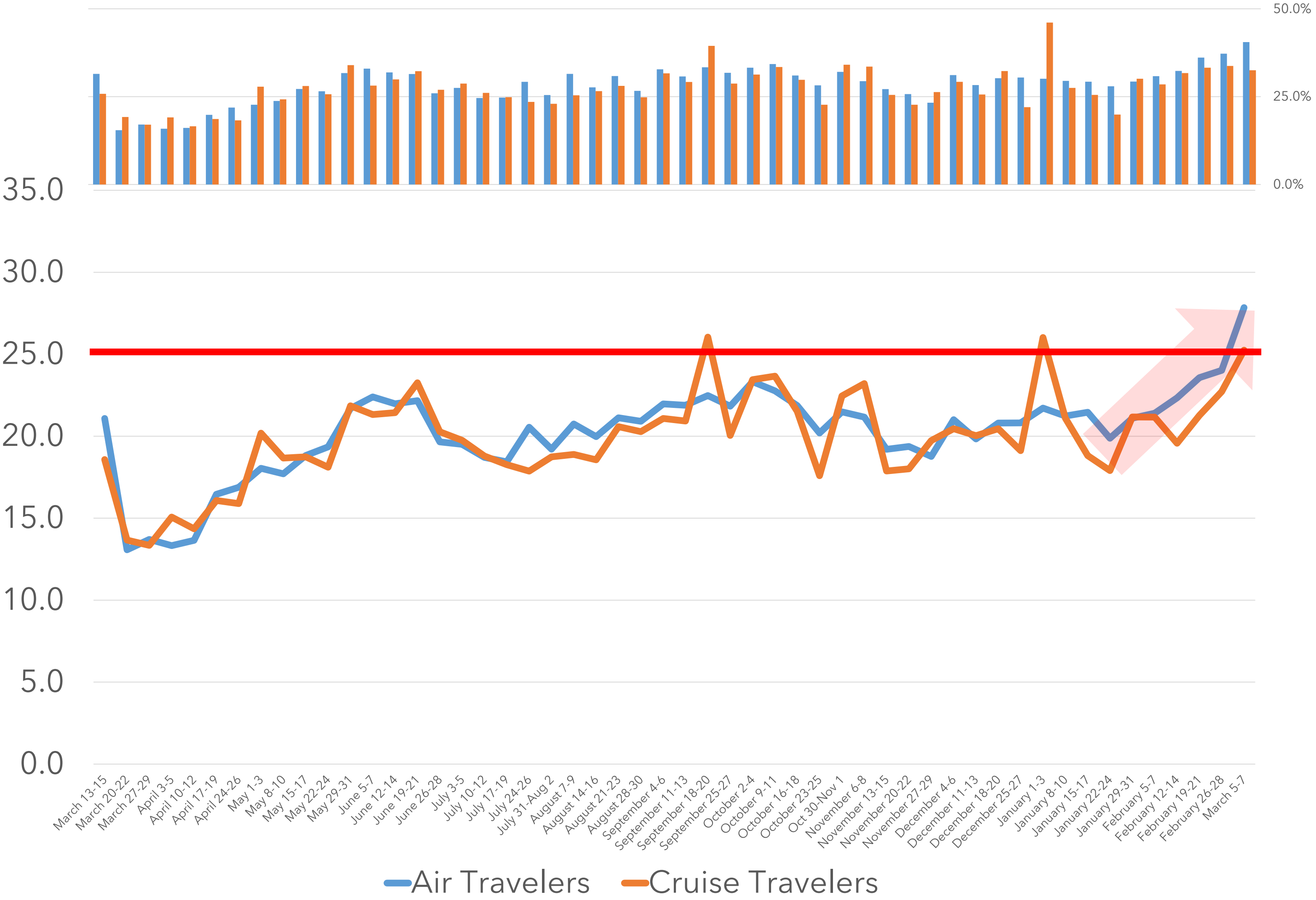


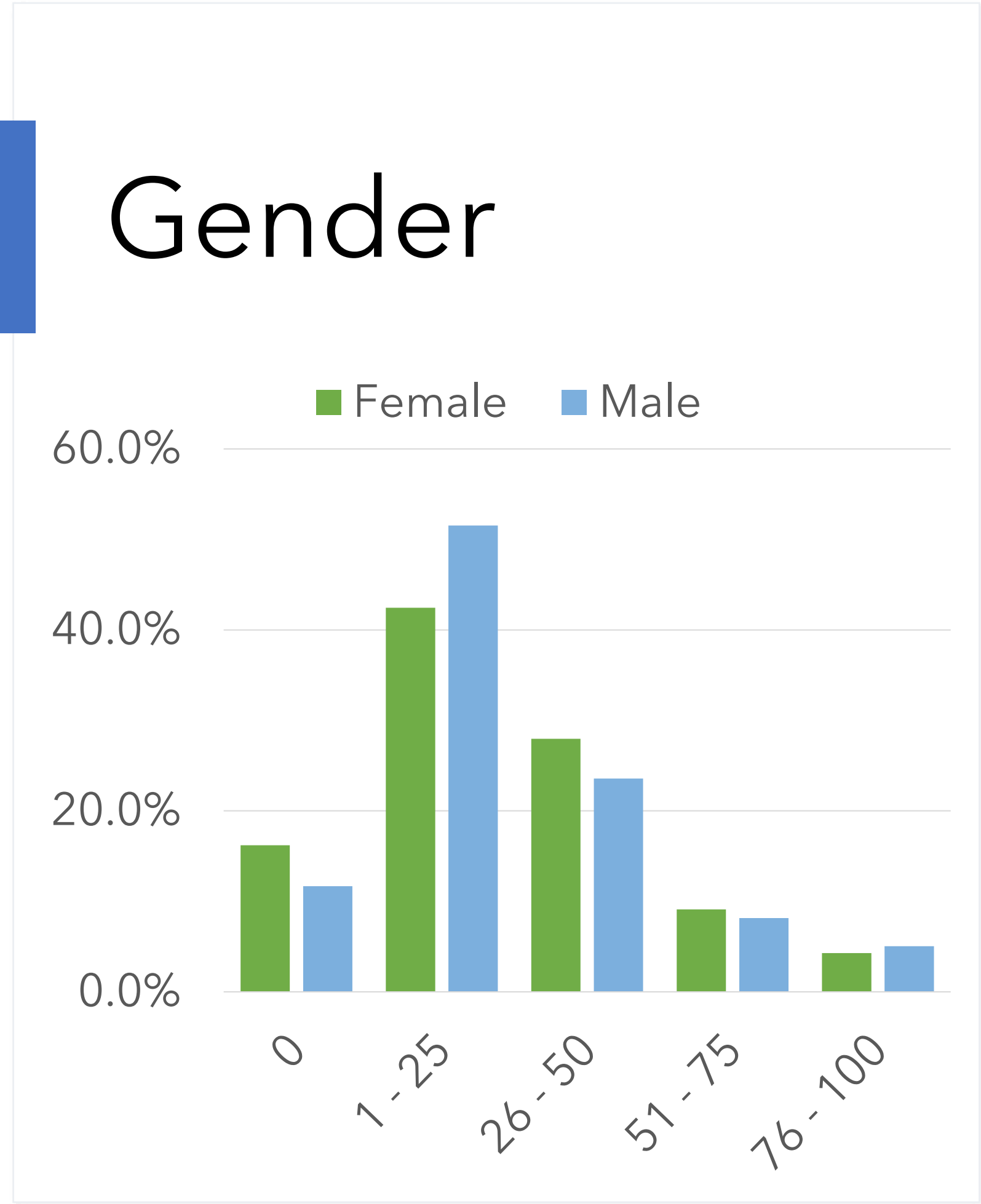




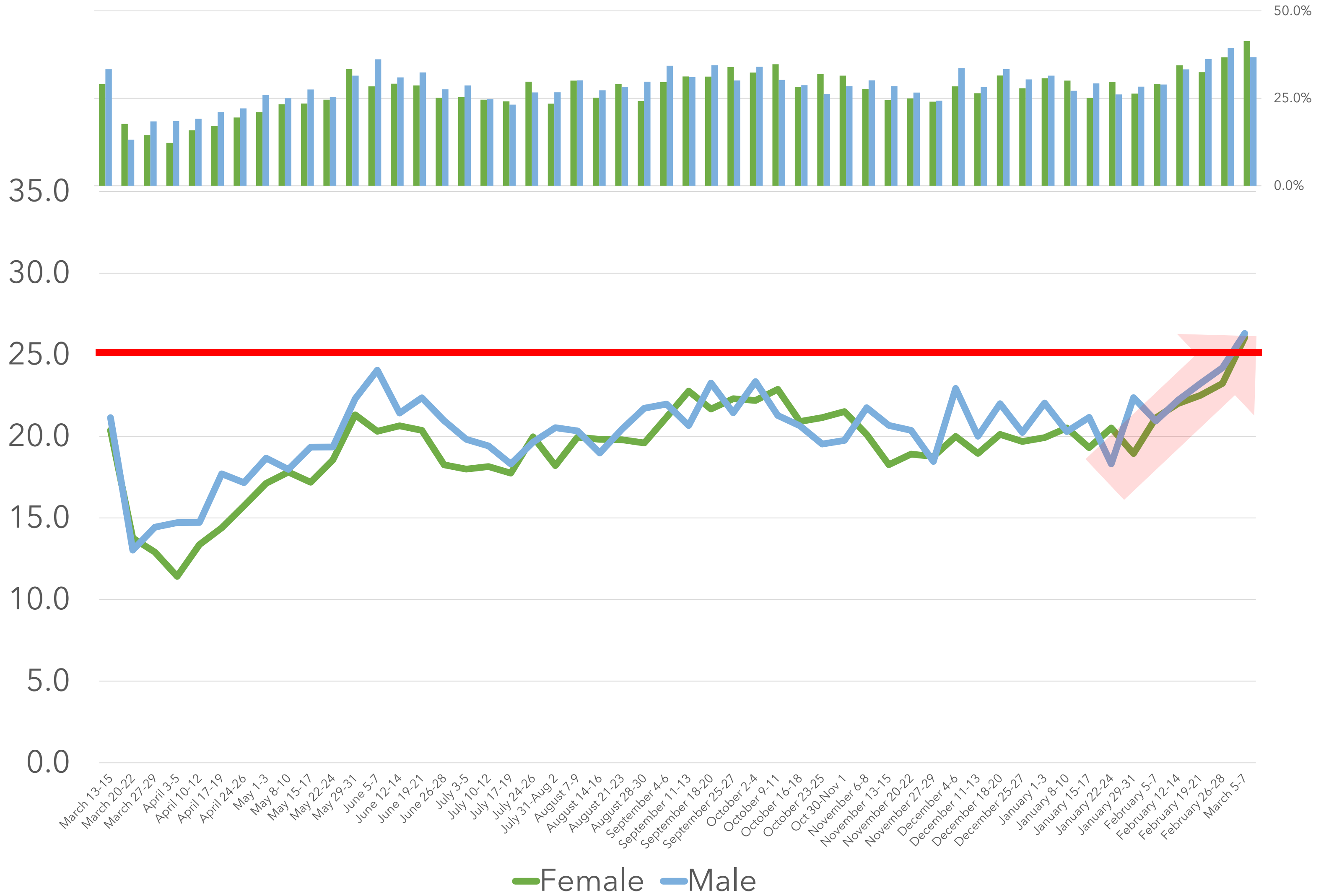


Percent Potentially Marketable  
(Index Above 25)



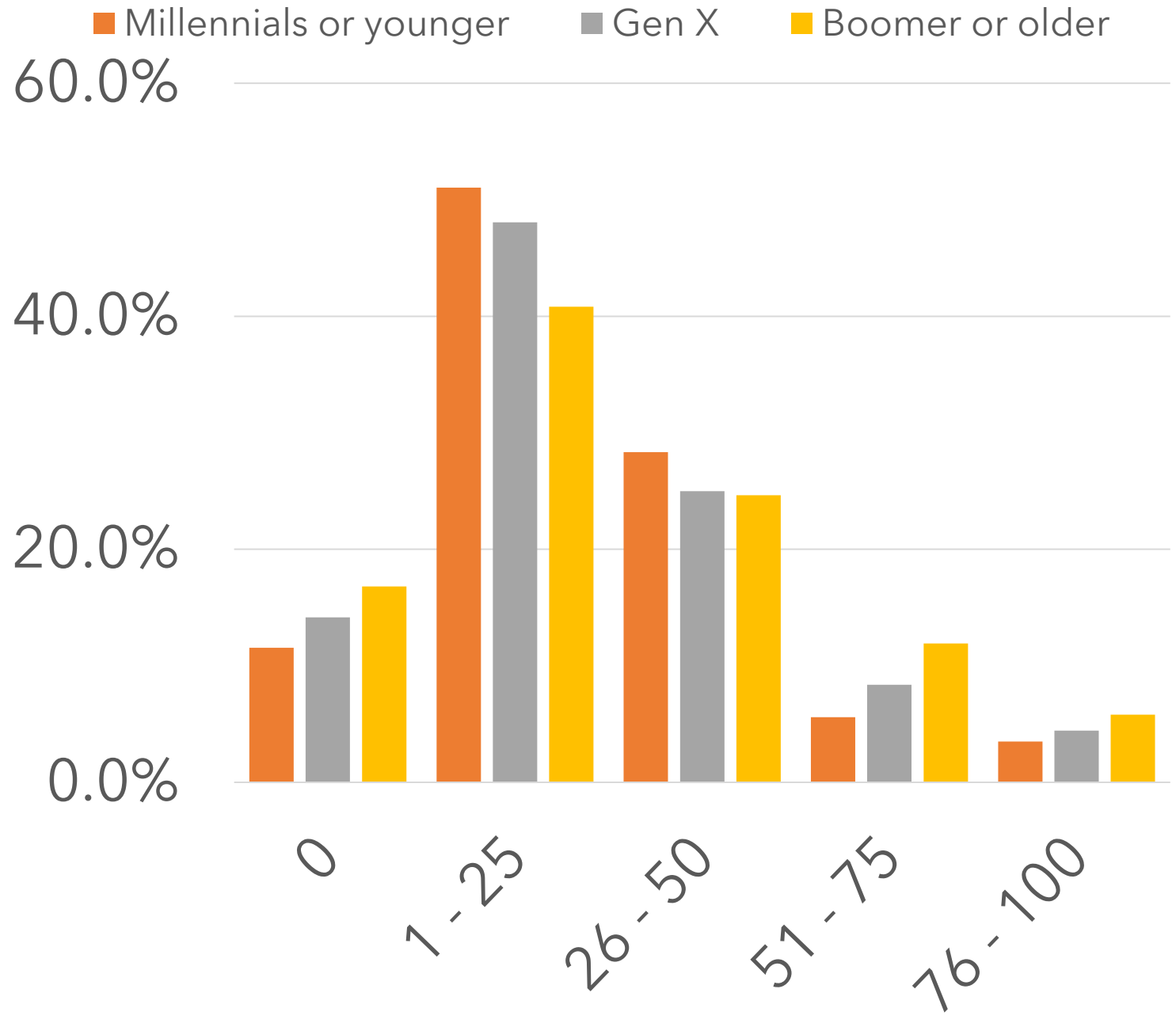


Percent Potentially Marketable  
(Index Above 25)

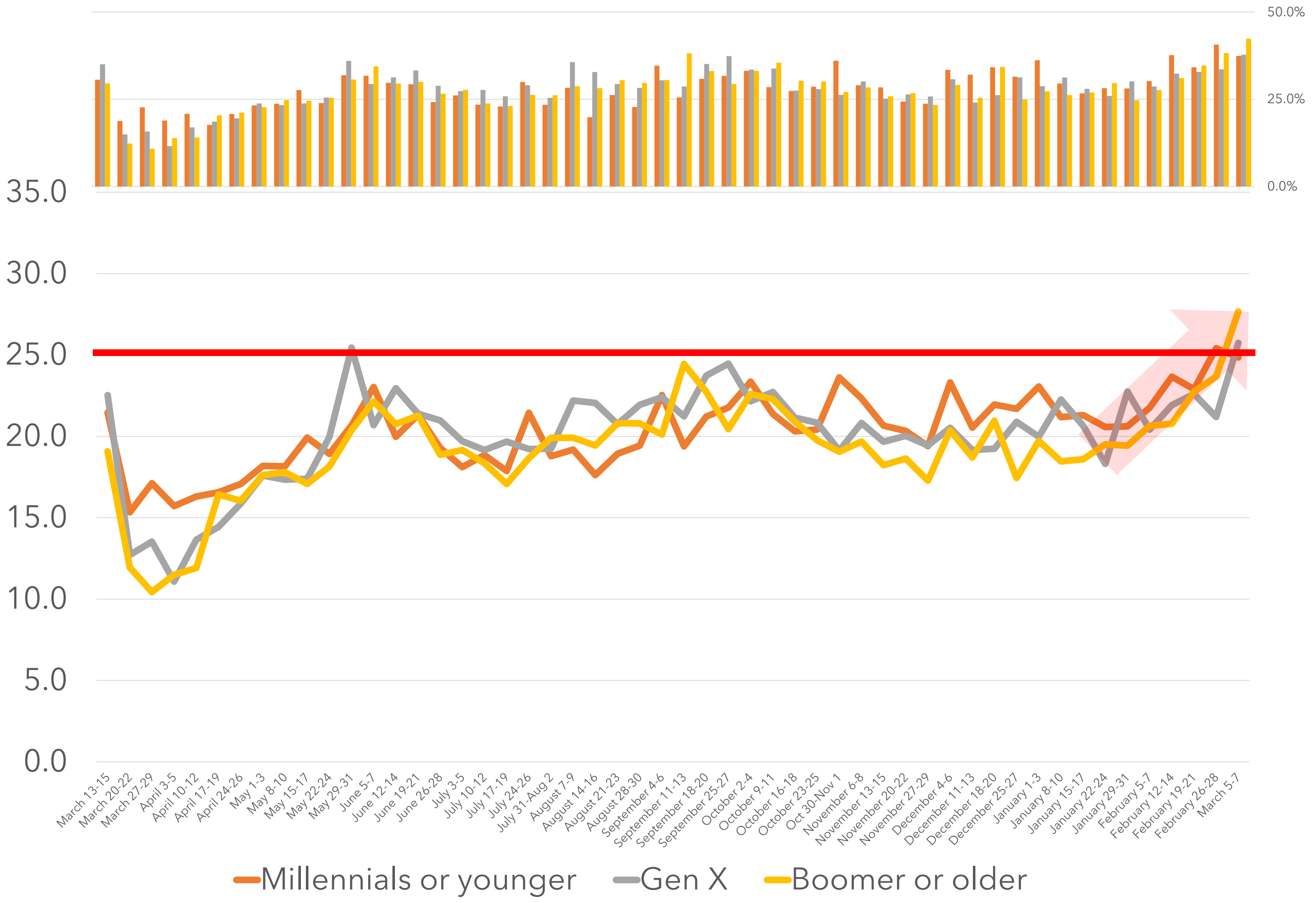




# Generation



## Percent Potentially Marketable (Index Above 25)



# US Regions

WEST MIDWEST NORTHEAST SOUTH

60.0%

40.0%

20.0%

0.0%

0

1 - 25

26 - 50

51 - 75

76 - 100

## Percent Potentially Marketable (Index Above 25)

35.0  
30.0  
25.0  
20.0  
15.0  
10.0  
5.0  
0.0

50.0%  
25.0%  
0.0%

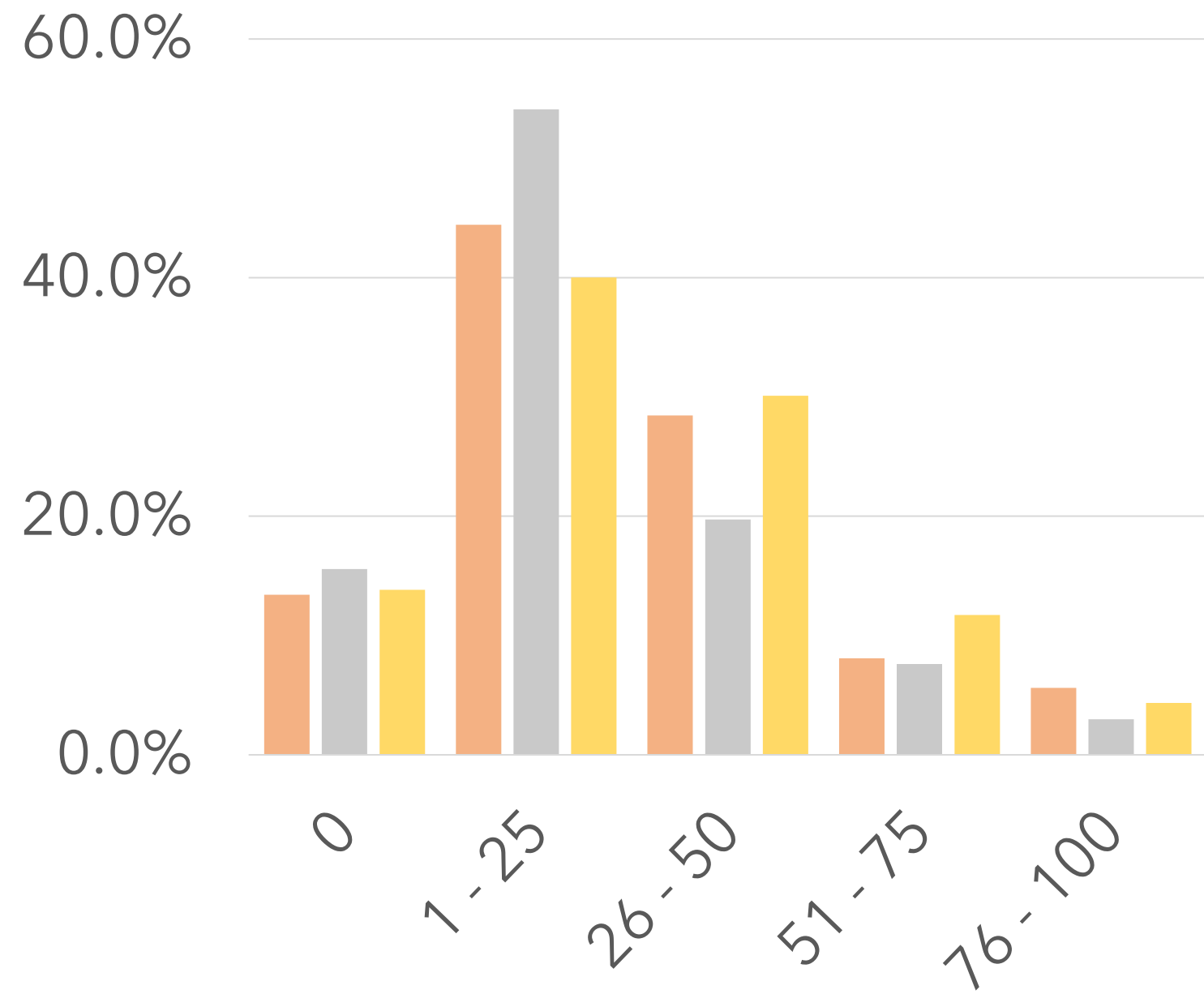
March 13-15  
March 20-22  
March 27-29  
April 3-5  
April 10-12  
April 17-19  
April 24-26  
May 1-3  
May 8-10  
May 15-17  
May 22-24  
May 29-31  
June 5-7  
June 12-14  
June 19-21  
June 26-28  
July 3-5  
July 10-12  
July 17-19  
July 24-26  
August 1-3  
August 7-9  
August 14-16  
August 21-23  
August 28-30  
September 4-6  
September 11-13  
September 18-20  
September 25-27  
October 2-4  
October 9-11  
October 16-18  
October 23-25  
October 30-Nov 1  
November 6-8  
November 13-15  
November 20-22  
November 27-29  
December 4-6  
December 11-13  
December 18-20  
December 25-27  
January 1-3  
January 8-10  
January 15-17  
January 22-24  
January 29-31  
February 5-7  
February 12-14  
February 19-21  
February 26-28  
March 5-7

WEST MIDWEST NORTHEAST SOUTH

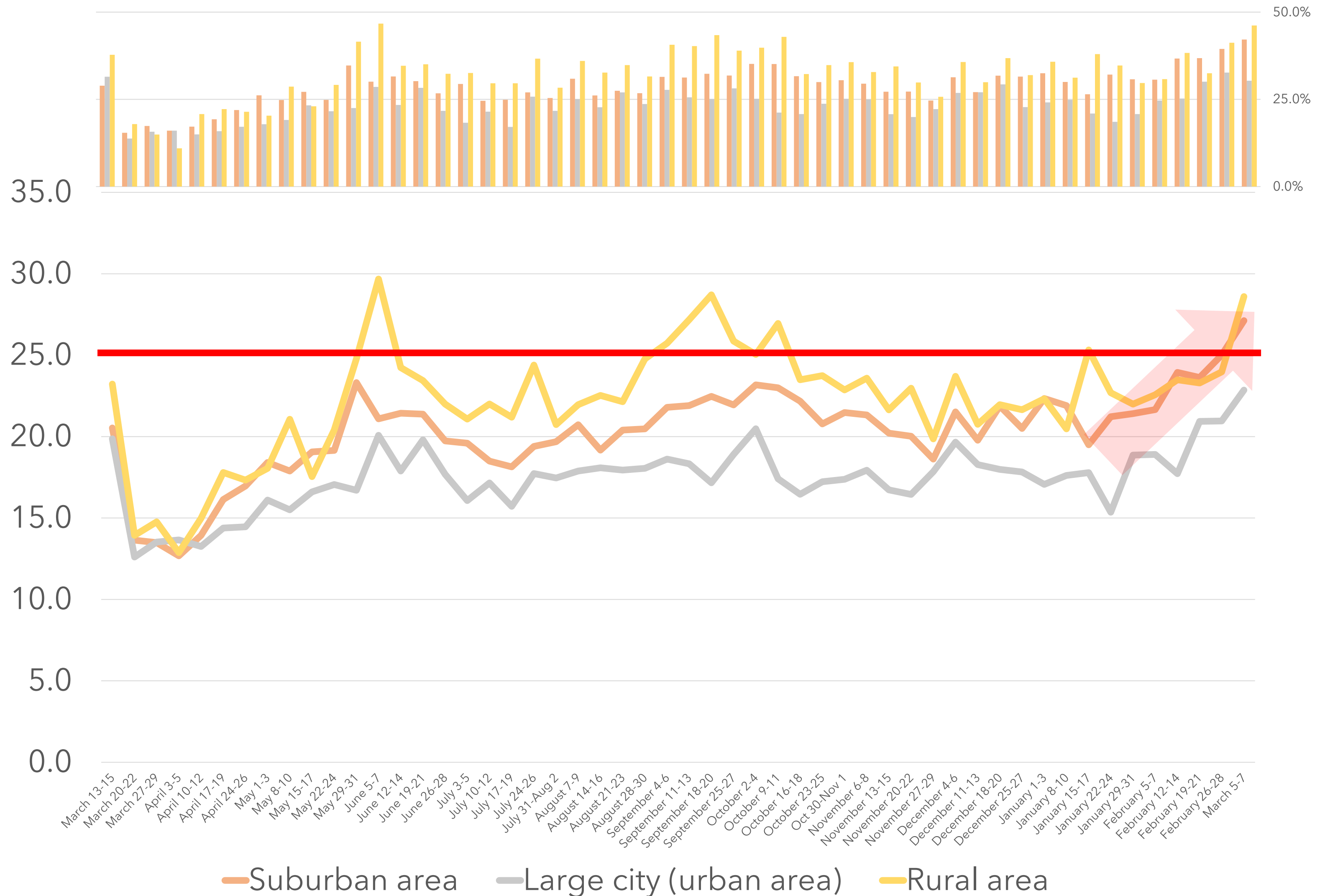


# Residence Type

Suburban area Large city (urban area) Rural area

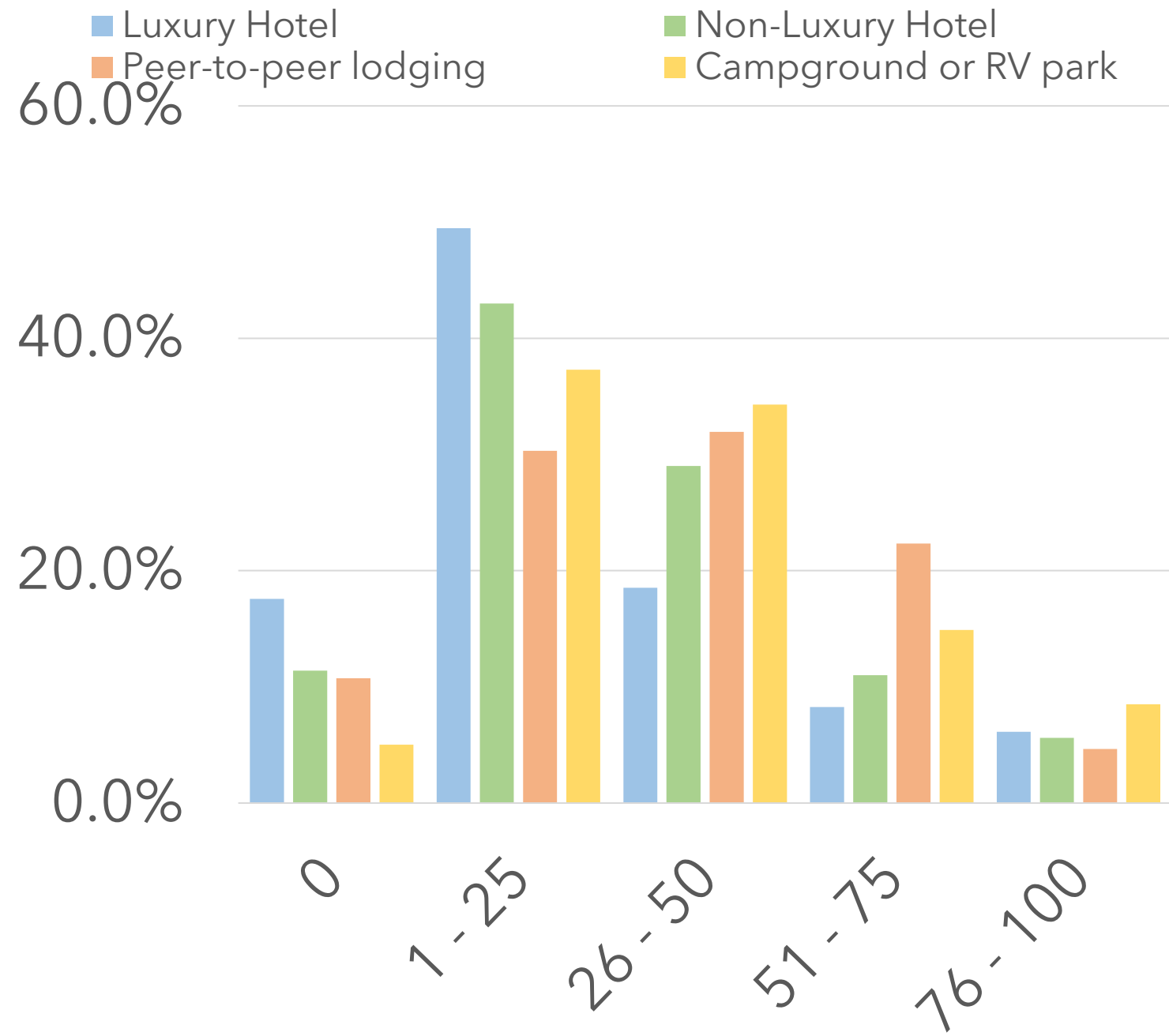


## Percent Potentially Marketable (Index Above 25)

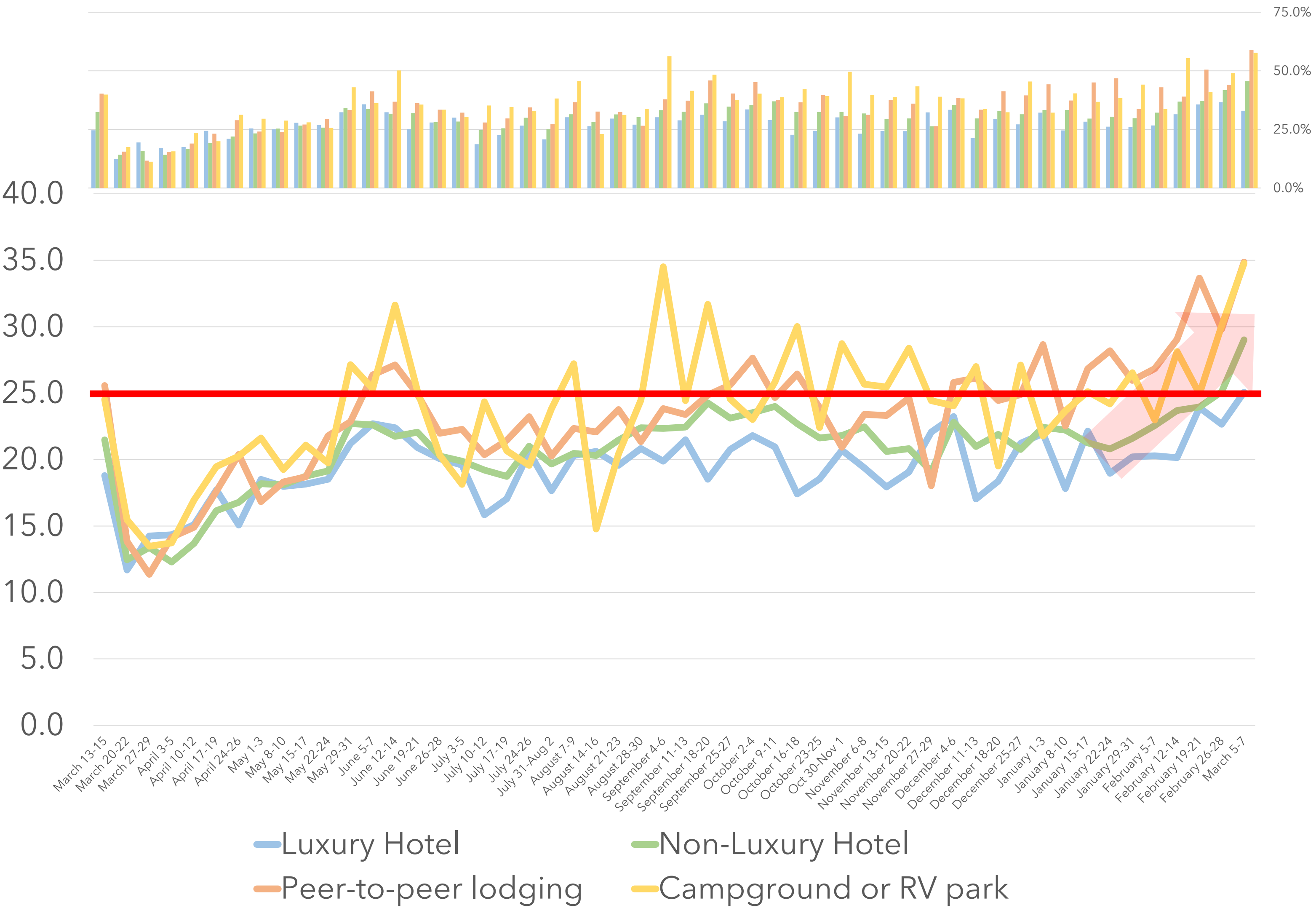




# Lodging Preference



## Percent Potentially Marketable (Index Above 25)

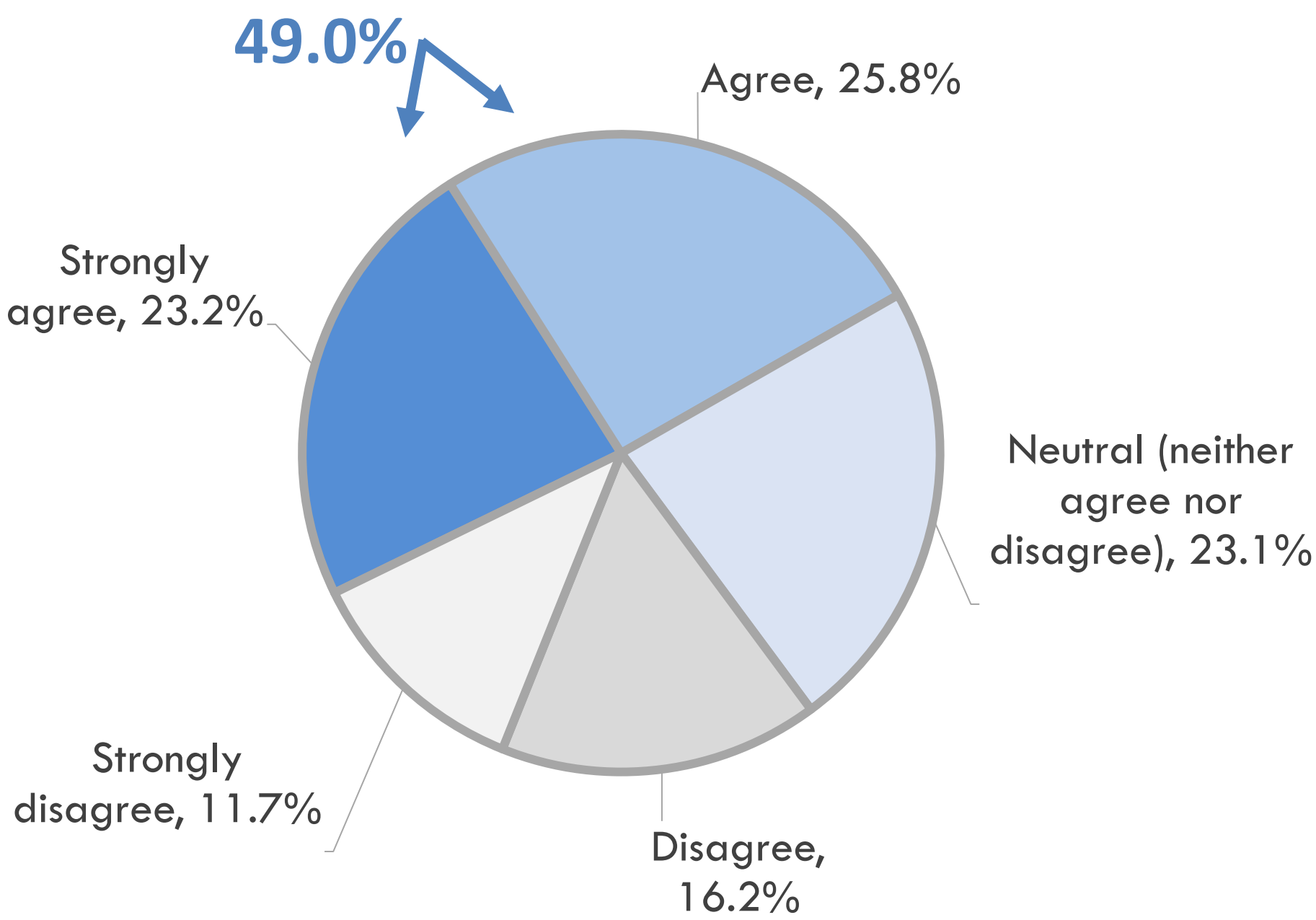




# COMFORT ENJOYING HOME COMMUNITY

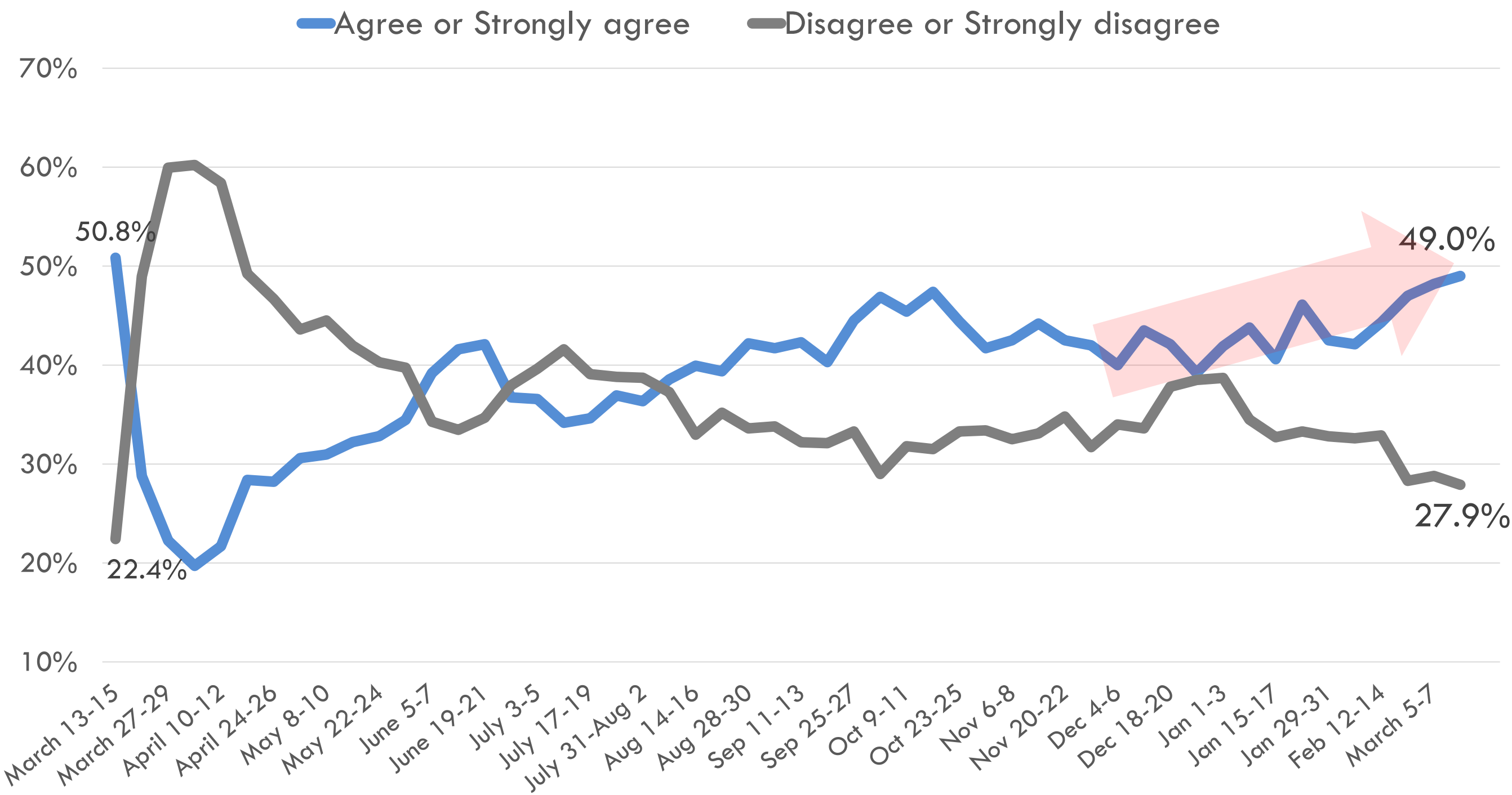
How much do you agree with the following statement?

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



(Base: Waves 1-52. 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 and 1,209 completed surveys.)

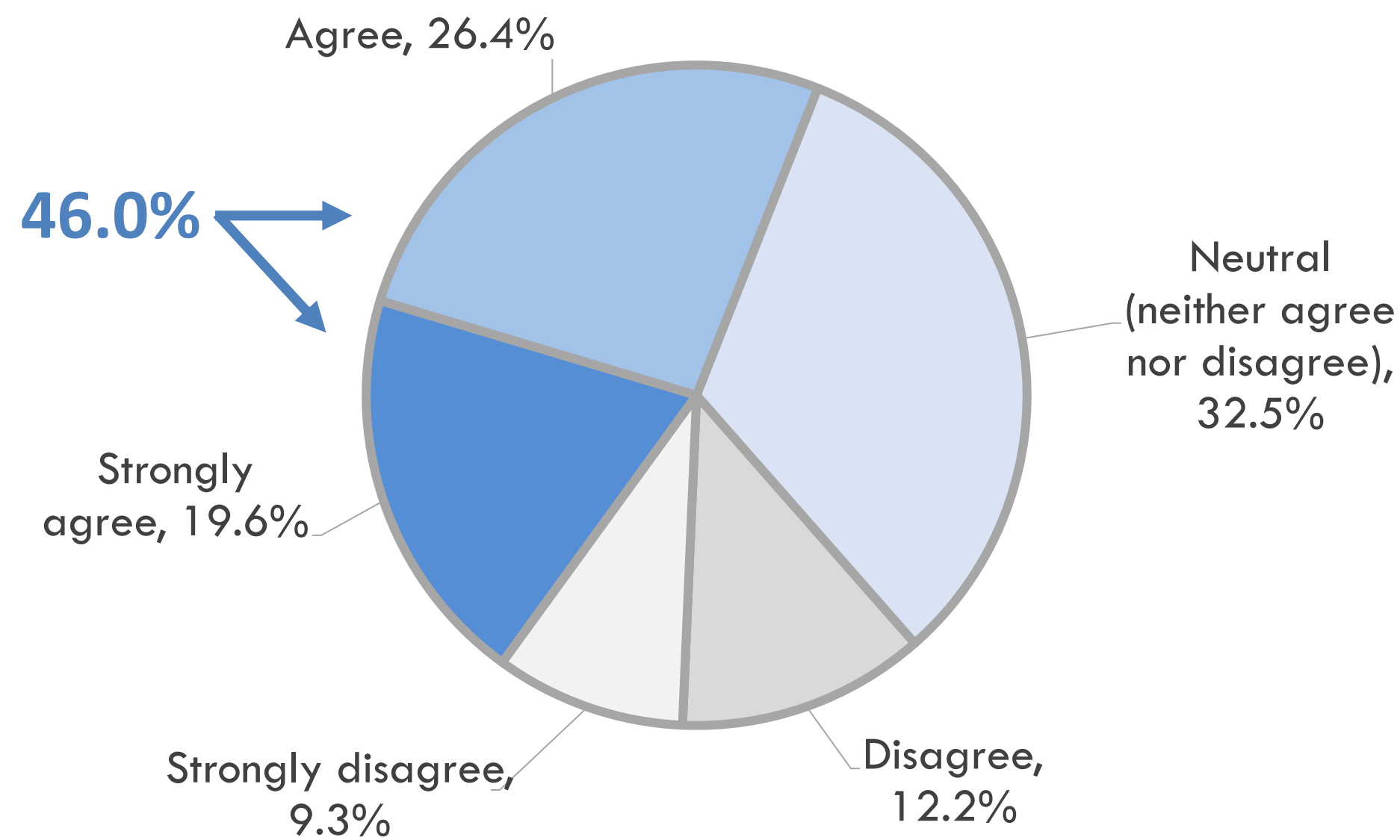
Historical data



# TRAVELERS IN COMMUNITY ARE UNWANTED

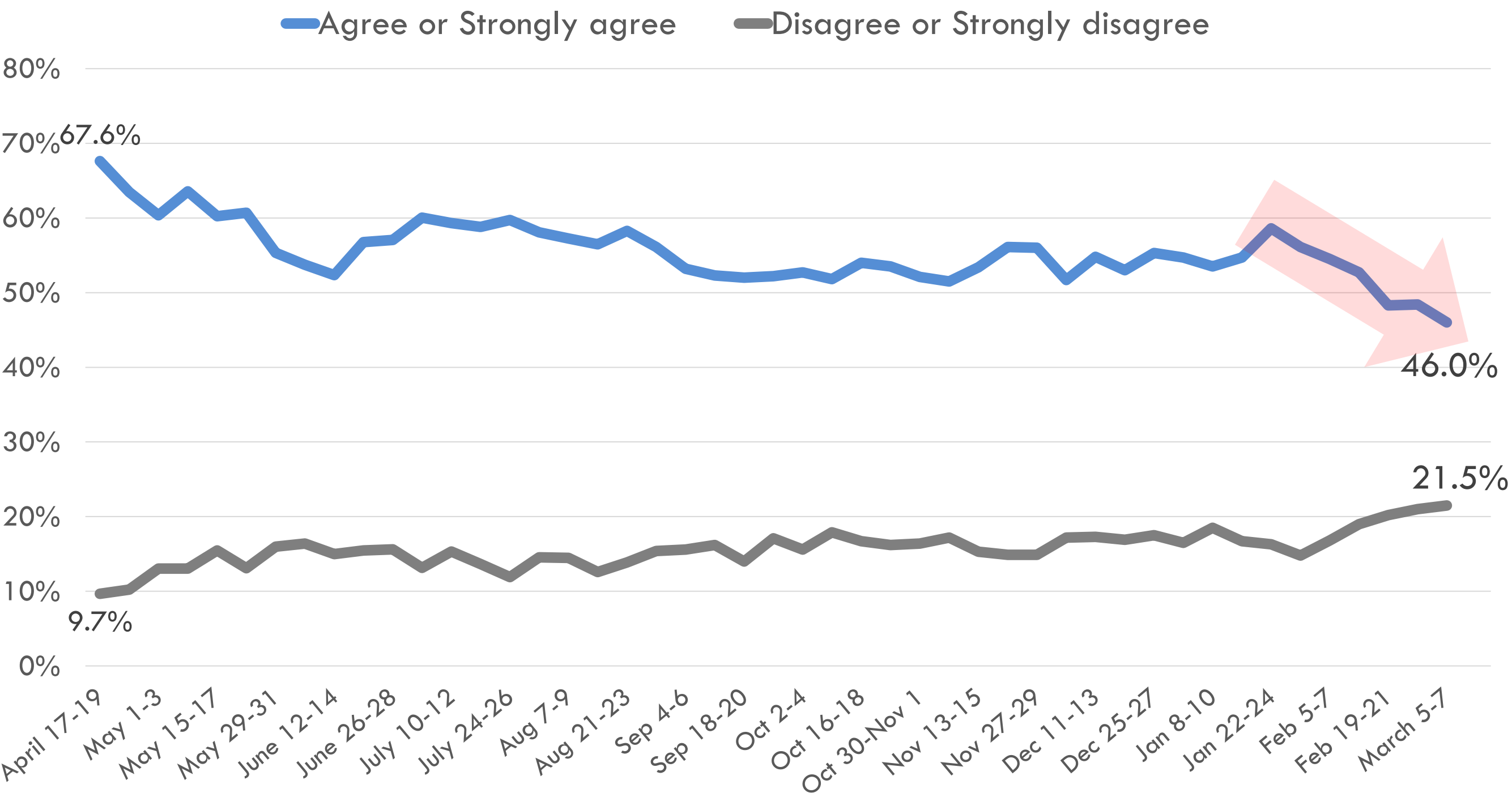
How much do you agree with the following statement?

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



(Base: Waves 6-52. 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, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204 and 1,209 completed surveys.)

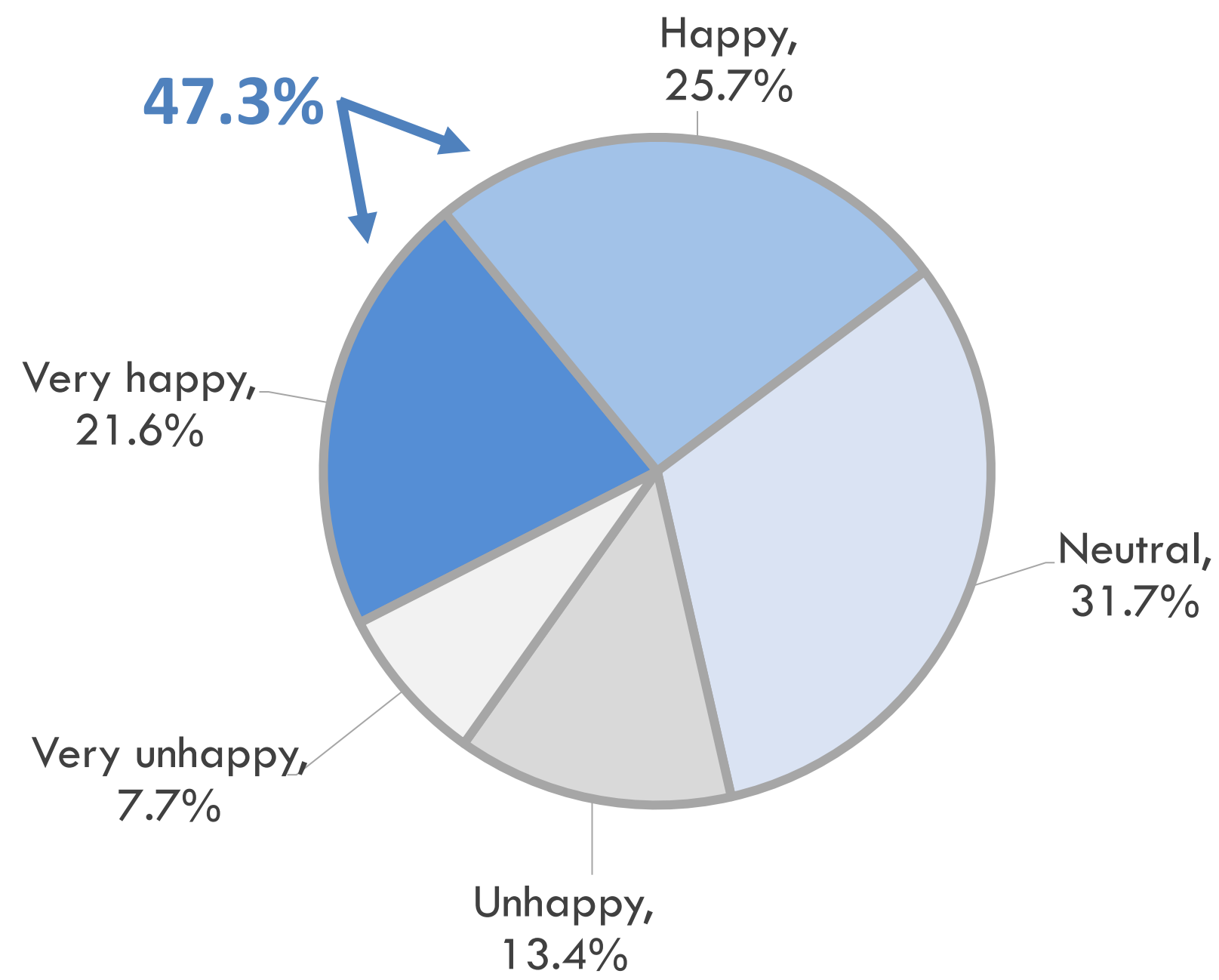
Historical data





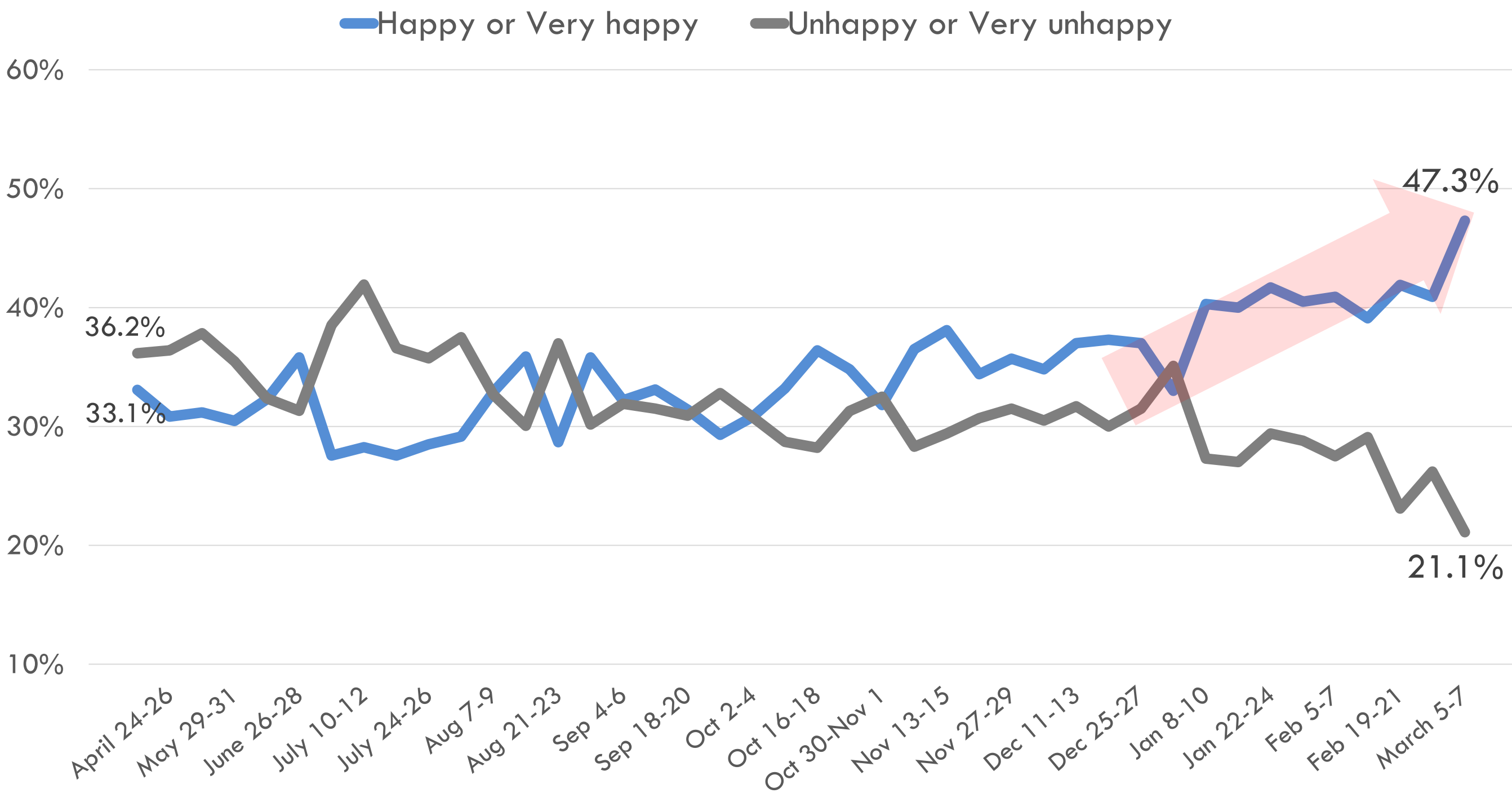
# FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

**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 16-52. 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, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204 and 1,209 completed surveys.)

Historical data







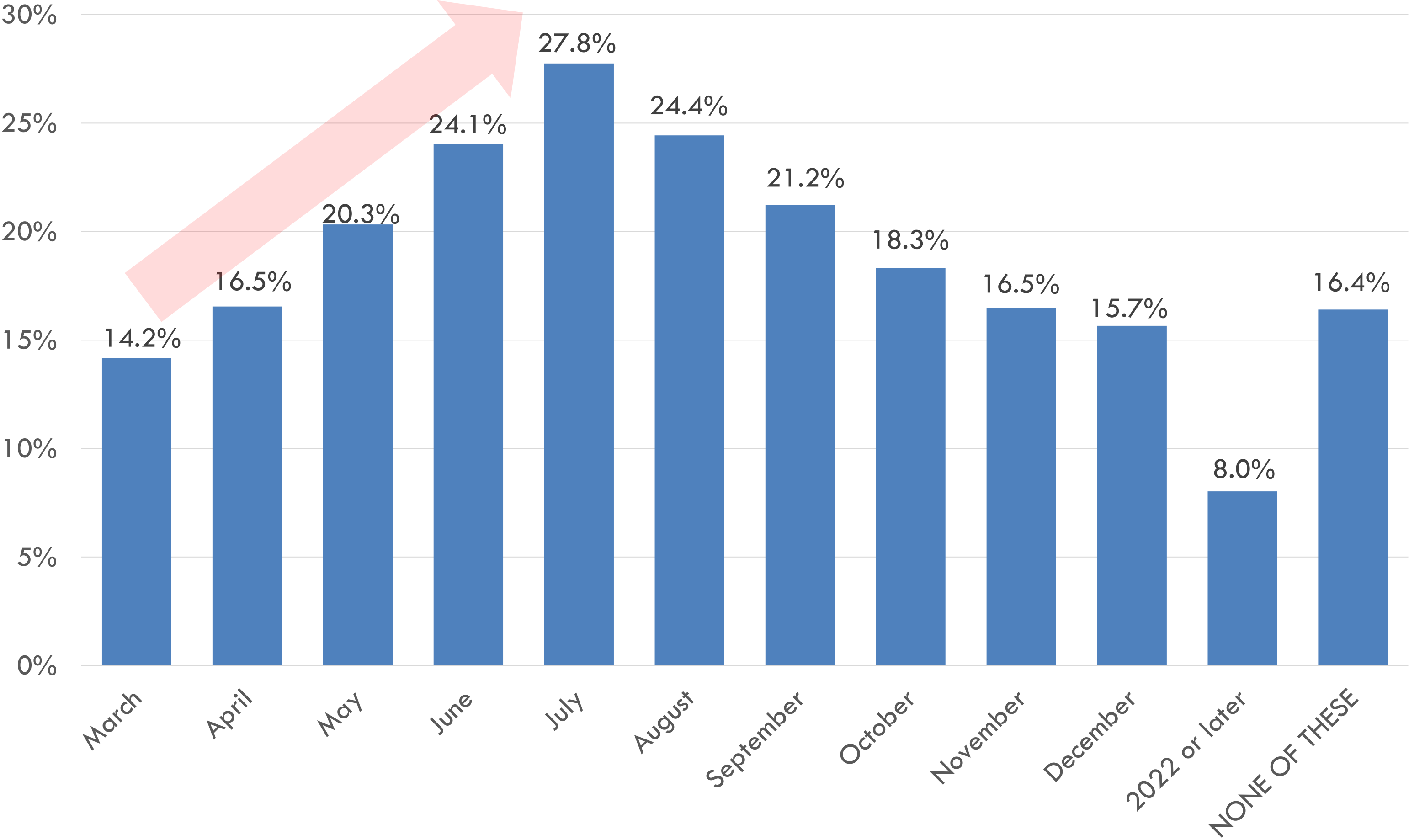
**Reported traveler booking behaviors are still relatively, but travel dreaming and planning reached a pandemic record**



# MONTHS OF EXPECTED LEISURE TRIPS IN 2021

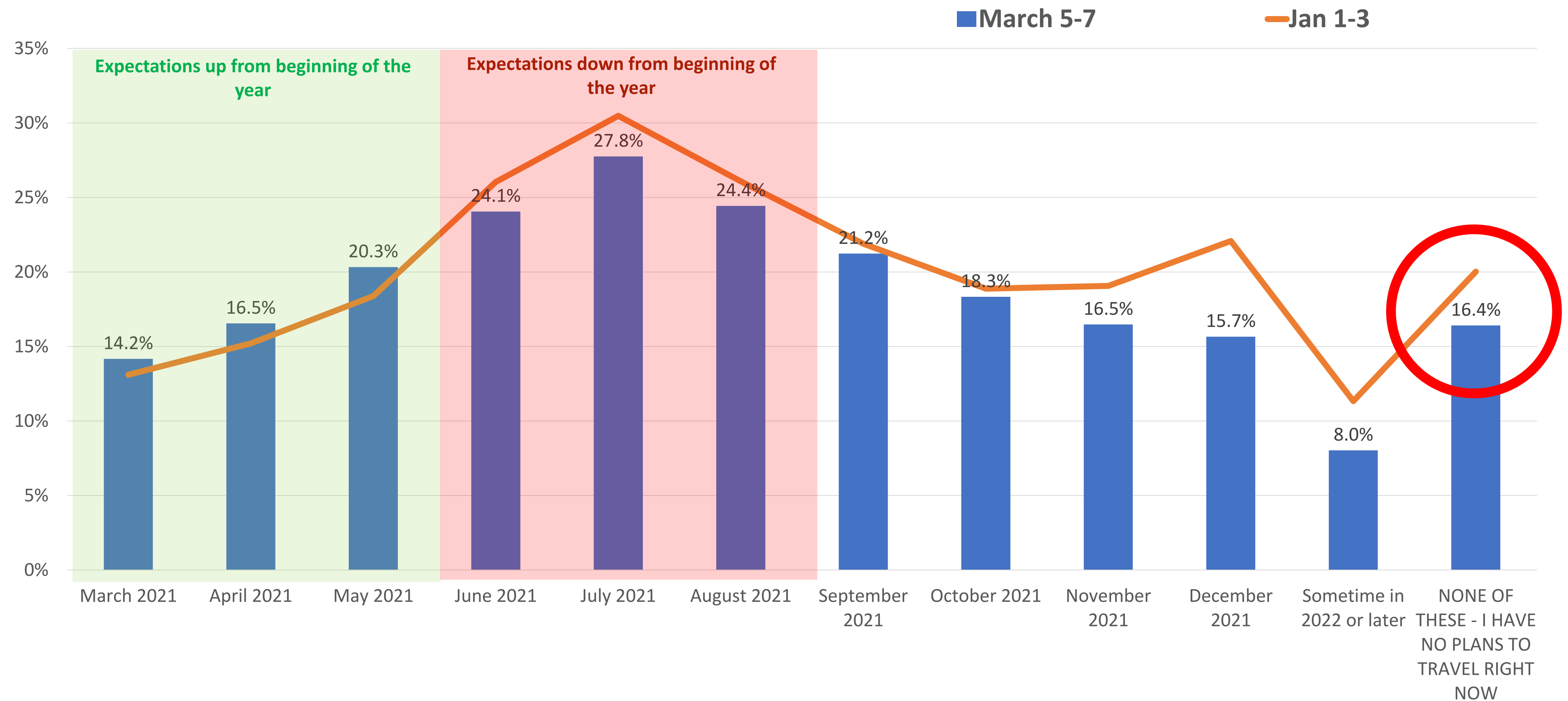
**Question:** Even if only tentatively scheduled, in which months do you currently plan to take any leisure trips? (Select all that apply)

(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 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)

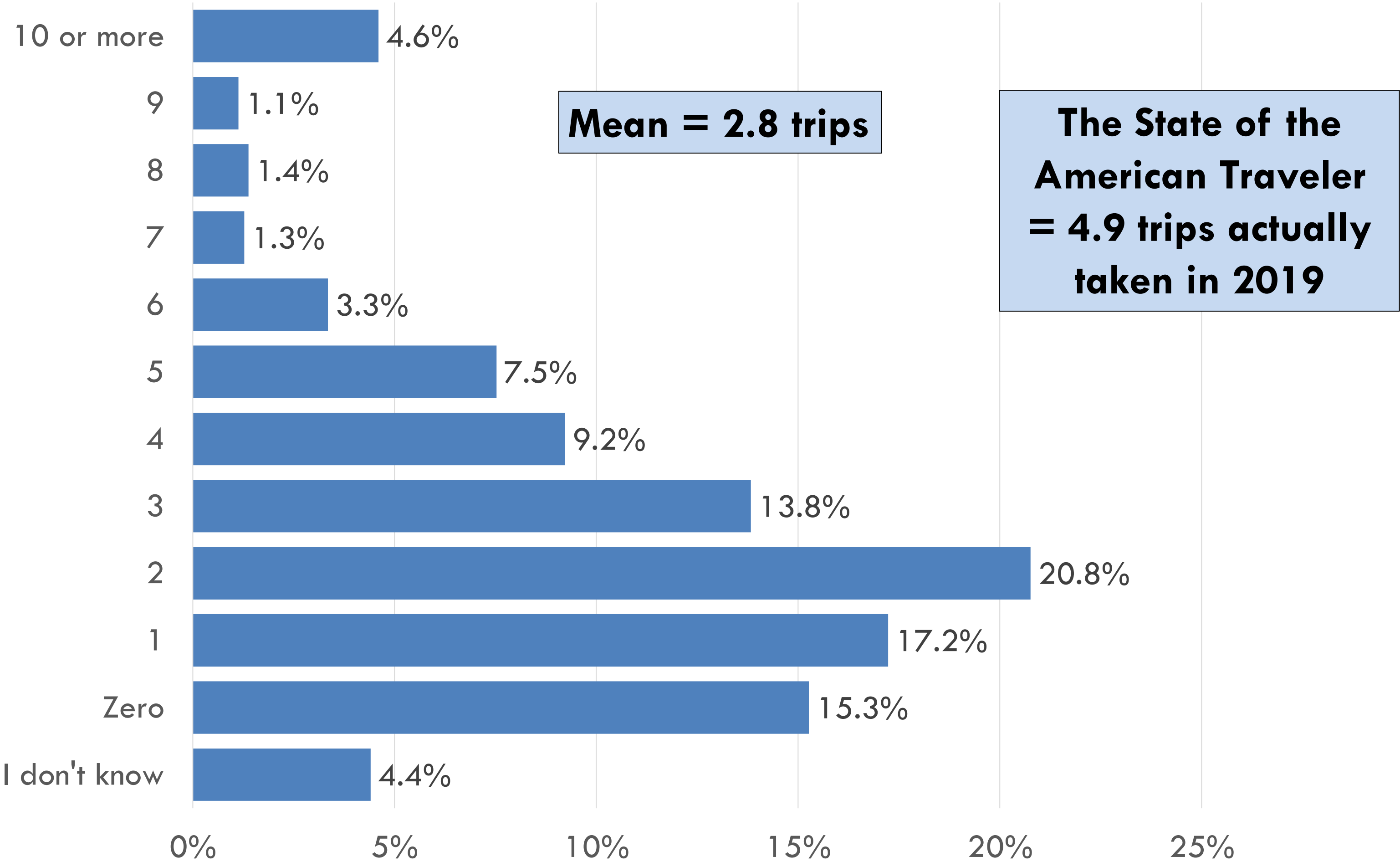




# EXPECTED NUMBER OF LEISURE TRIPS IN 2021

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

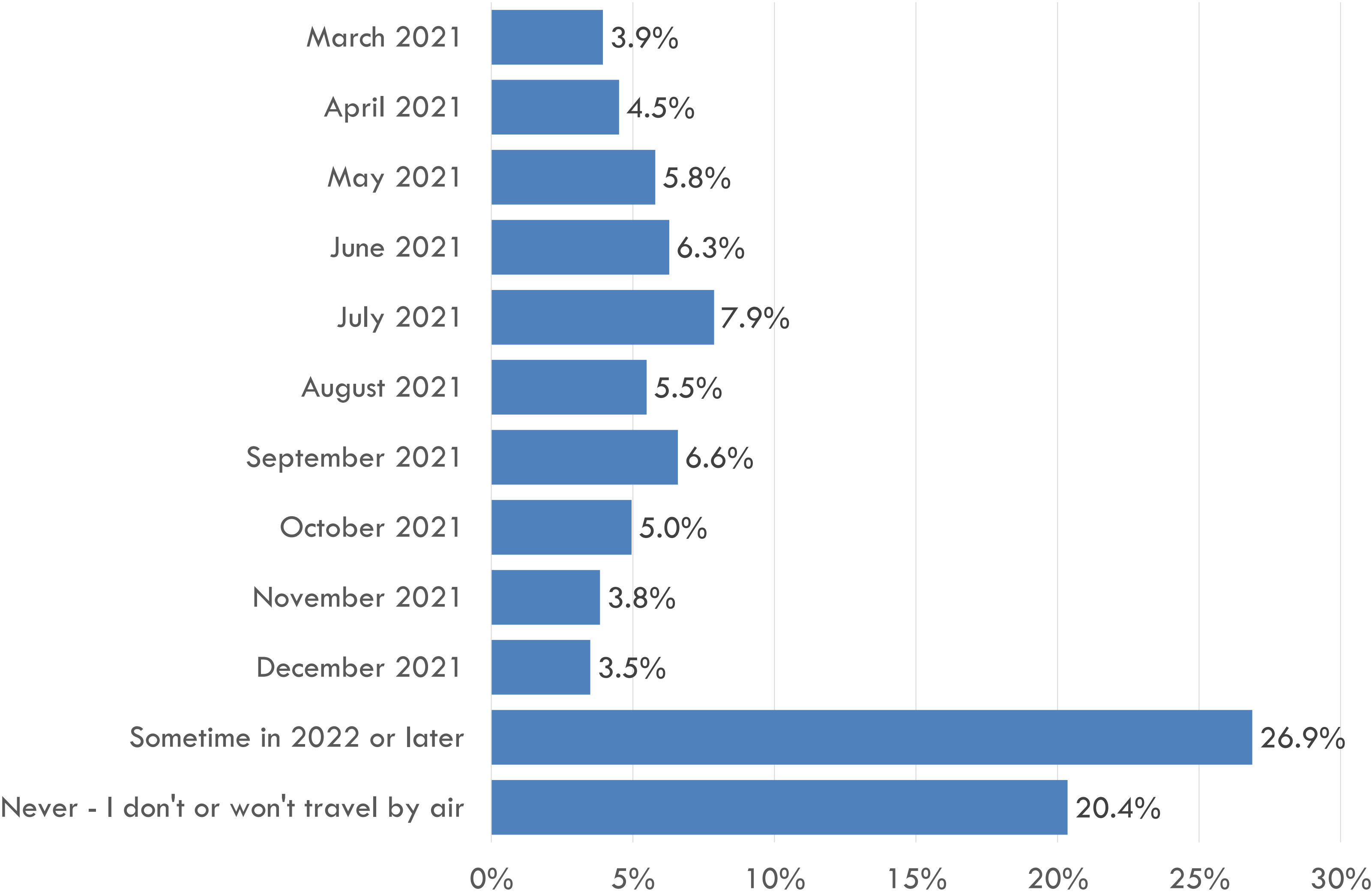
(Base: Waves 52 data. All respondents, 1,156 completed surveys. Data collected March 5-7, 2021)



# 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 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)



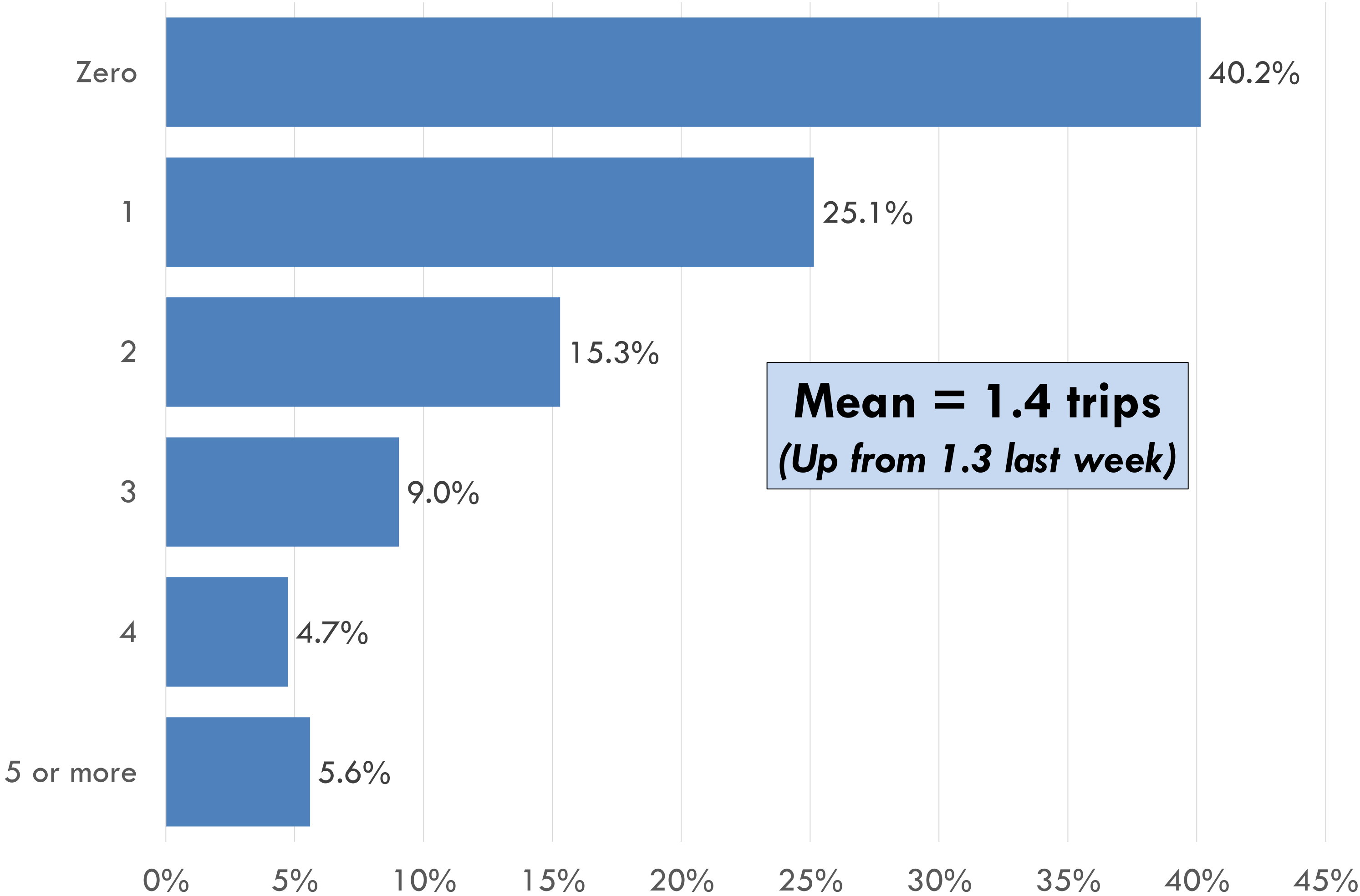


# LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

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

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

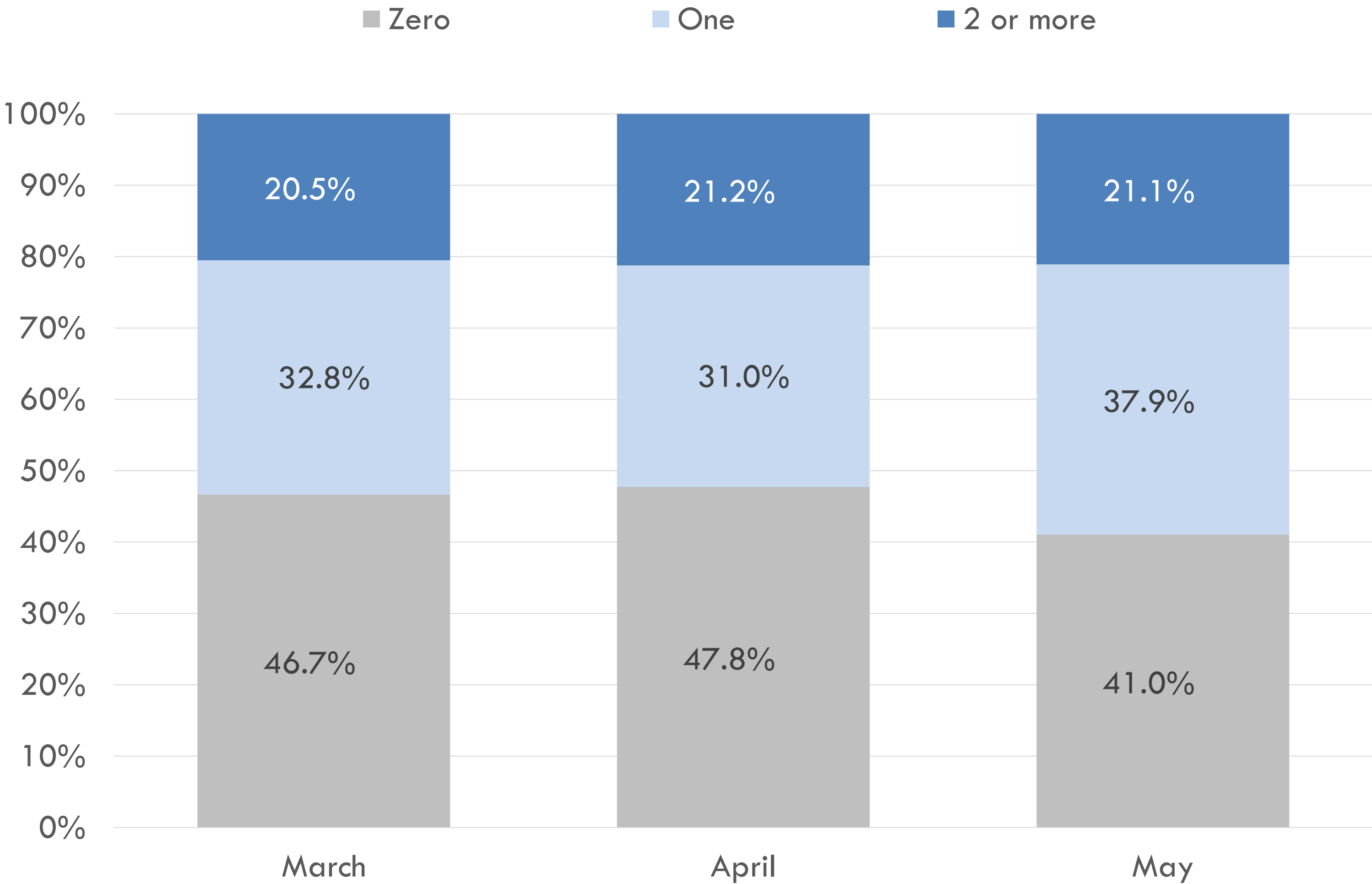
*(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)*



# 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 52 data. Respondents expecting to travel in the next three months, 712 completed surveys. Data collected March 5-7, 2021)*



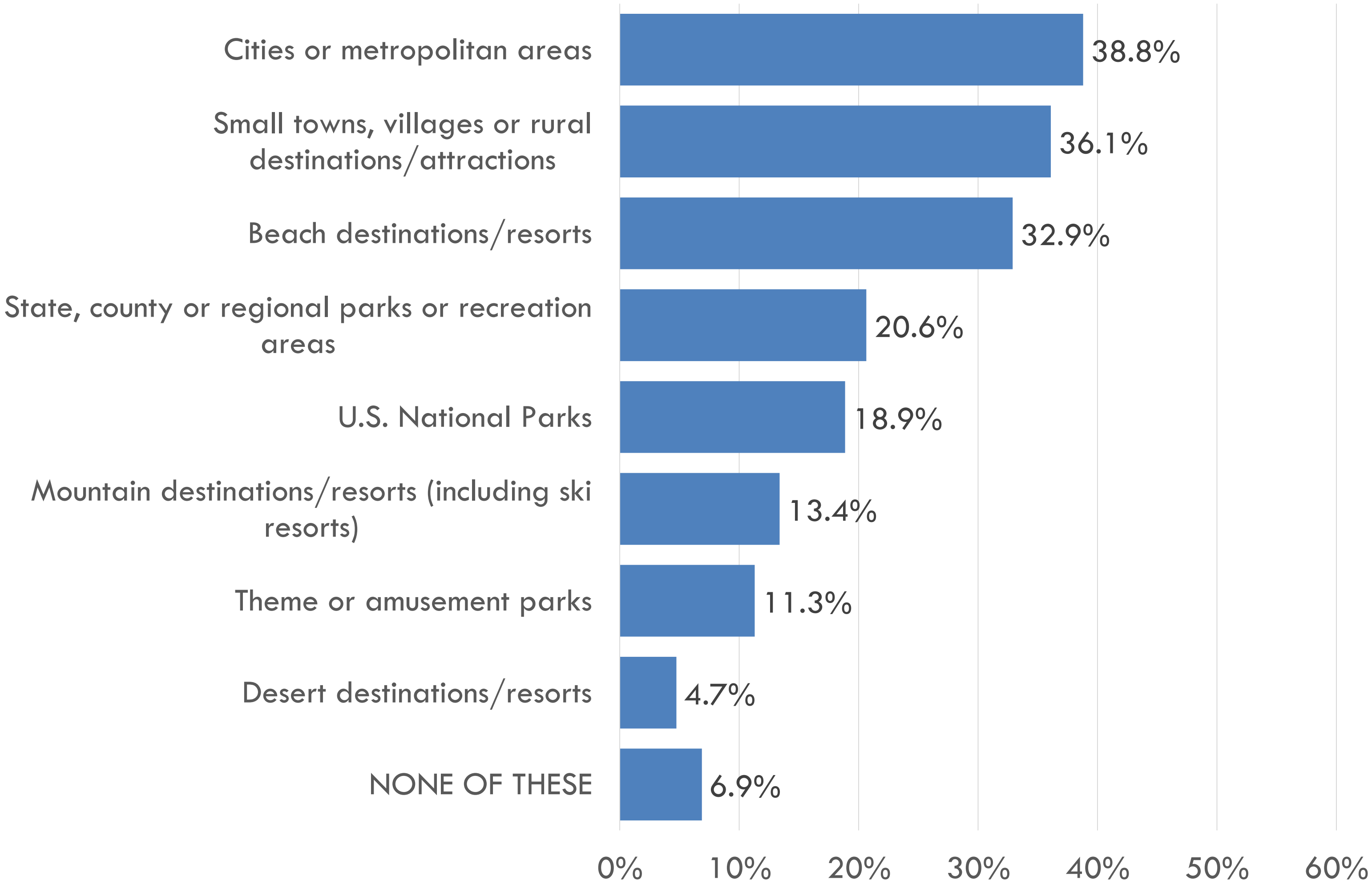
**Note:** Respondents were asked to report trips planned in the remaining days of March and the first 7 days of June.



# DESTINATION TYPES EXPECTED (NEXT 3 MONTHS)

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

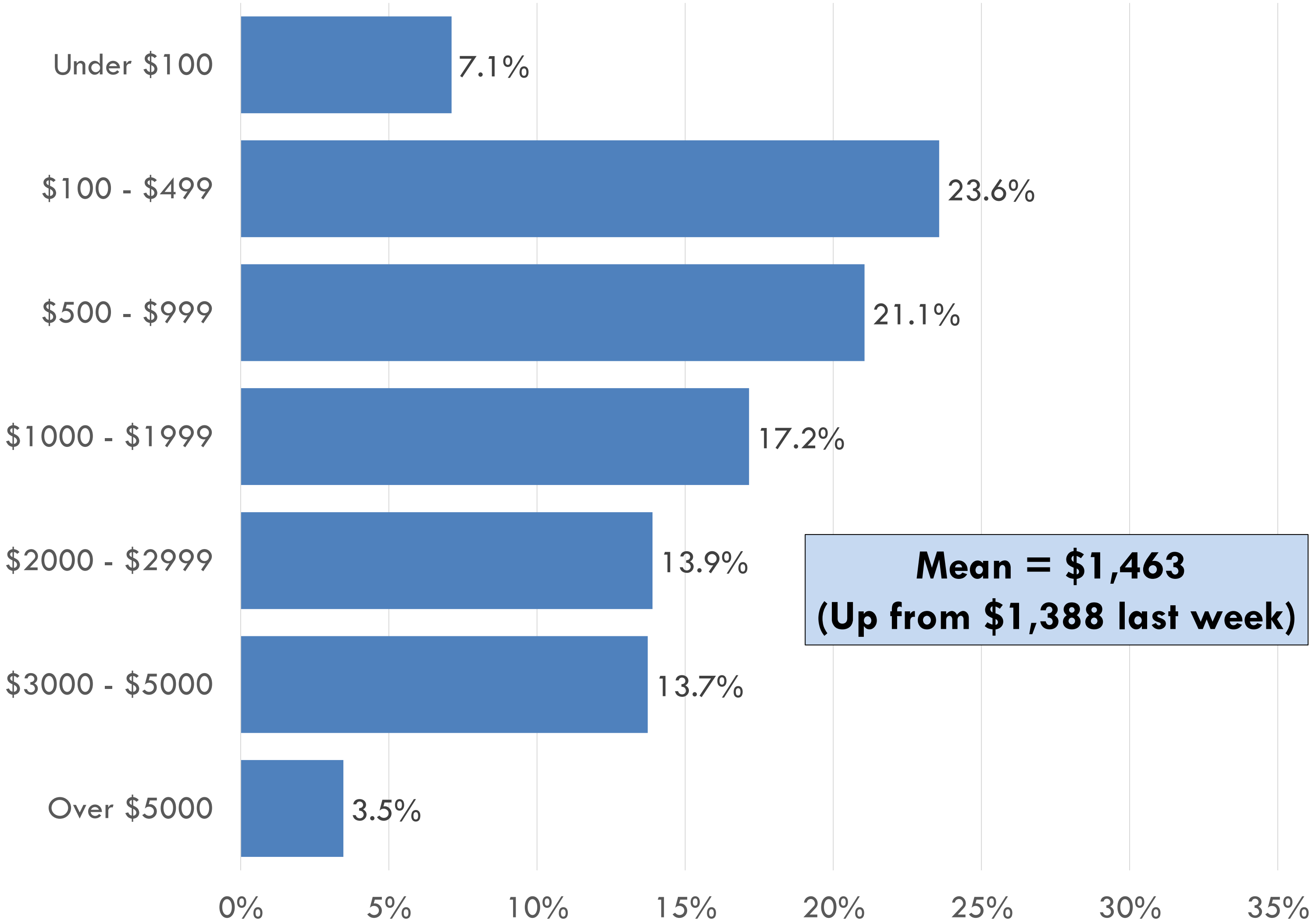
*(Base: Waves 52 data. Respondents expecting to travel in the next three months, 712 completed surveys. Data collected March 5-7, 2021)*



# 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?

(Base: Waves 52 data. Respondents expecting to travel in the next three months, 723 completed surveys. Data collected March 5-7, 2021)



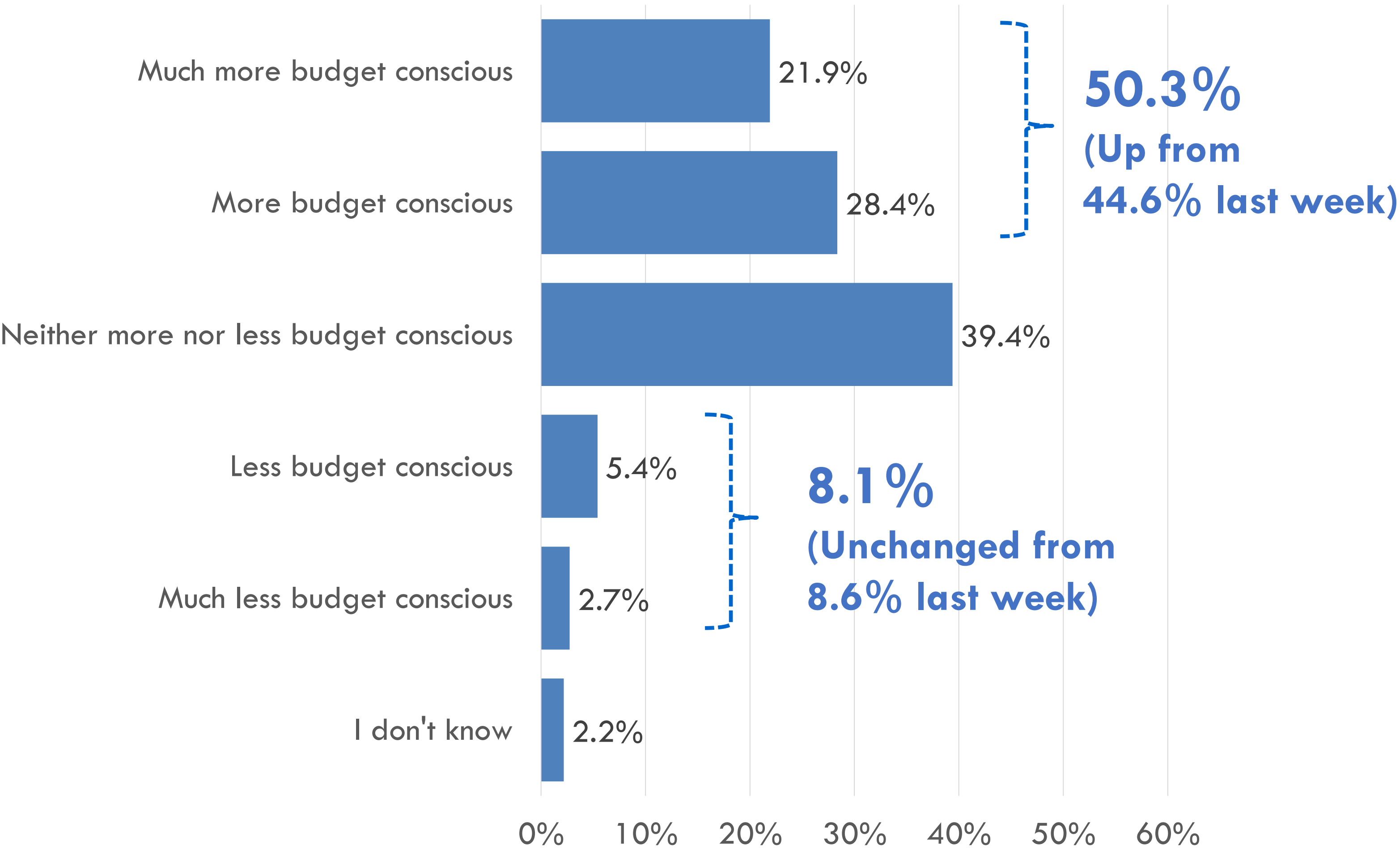


# BUDGET CONSCIOUSNESS AROUND TRAVEL (NEXT 3 MONTHS)

**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 52 data. Respondents expecting to travel in the next three months, 712 completed surveys. Data collected March 5-7, 2021)

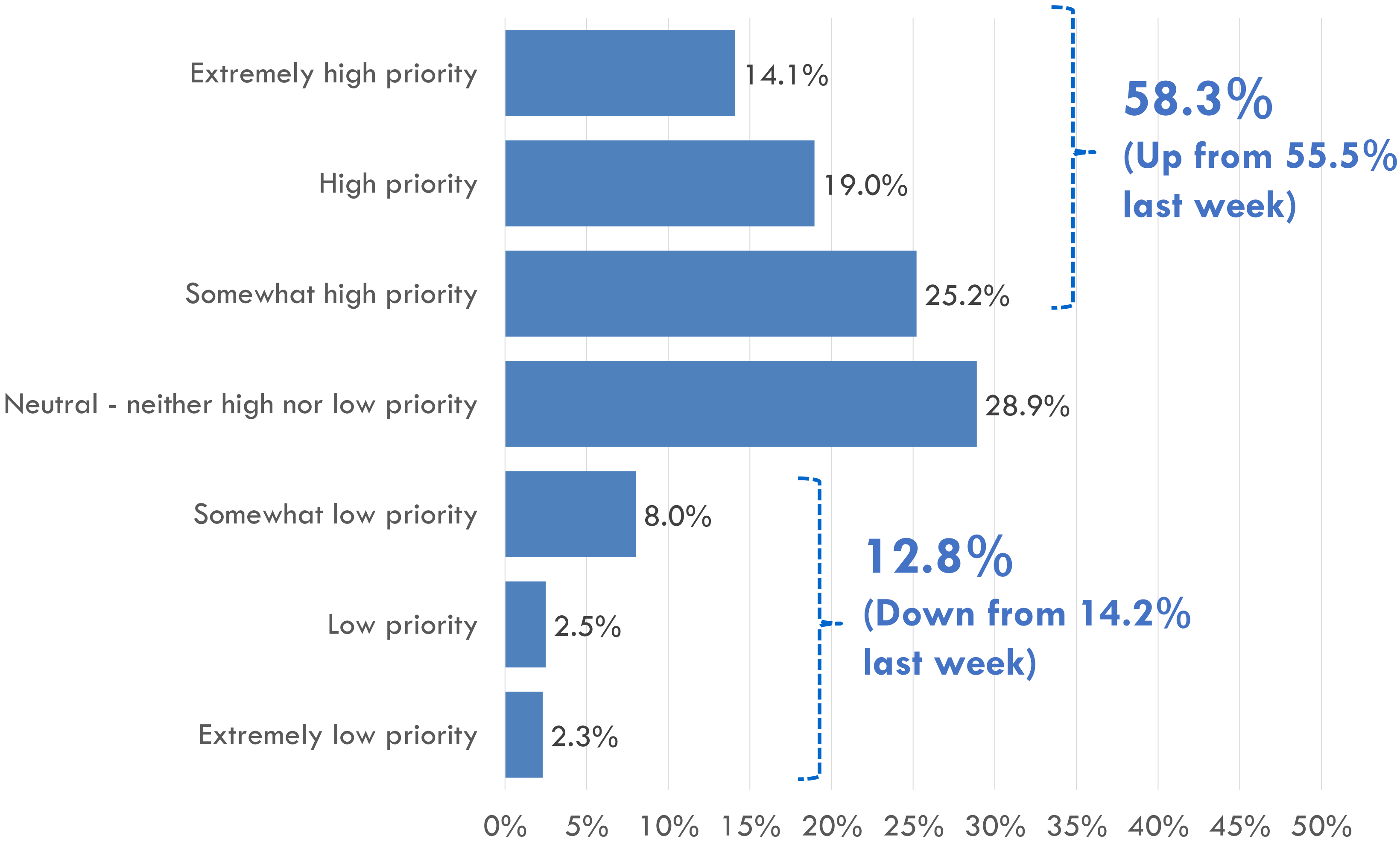


# LEISURE TRAVEL AS A BUDGET PRIORITY (NEXT 3 MONTHS)

**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 52 data. Respondents expecting to travel in the next three months, 712 completed surveys. Data collected March 5-7, 2021)



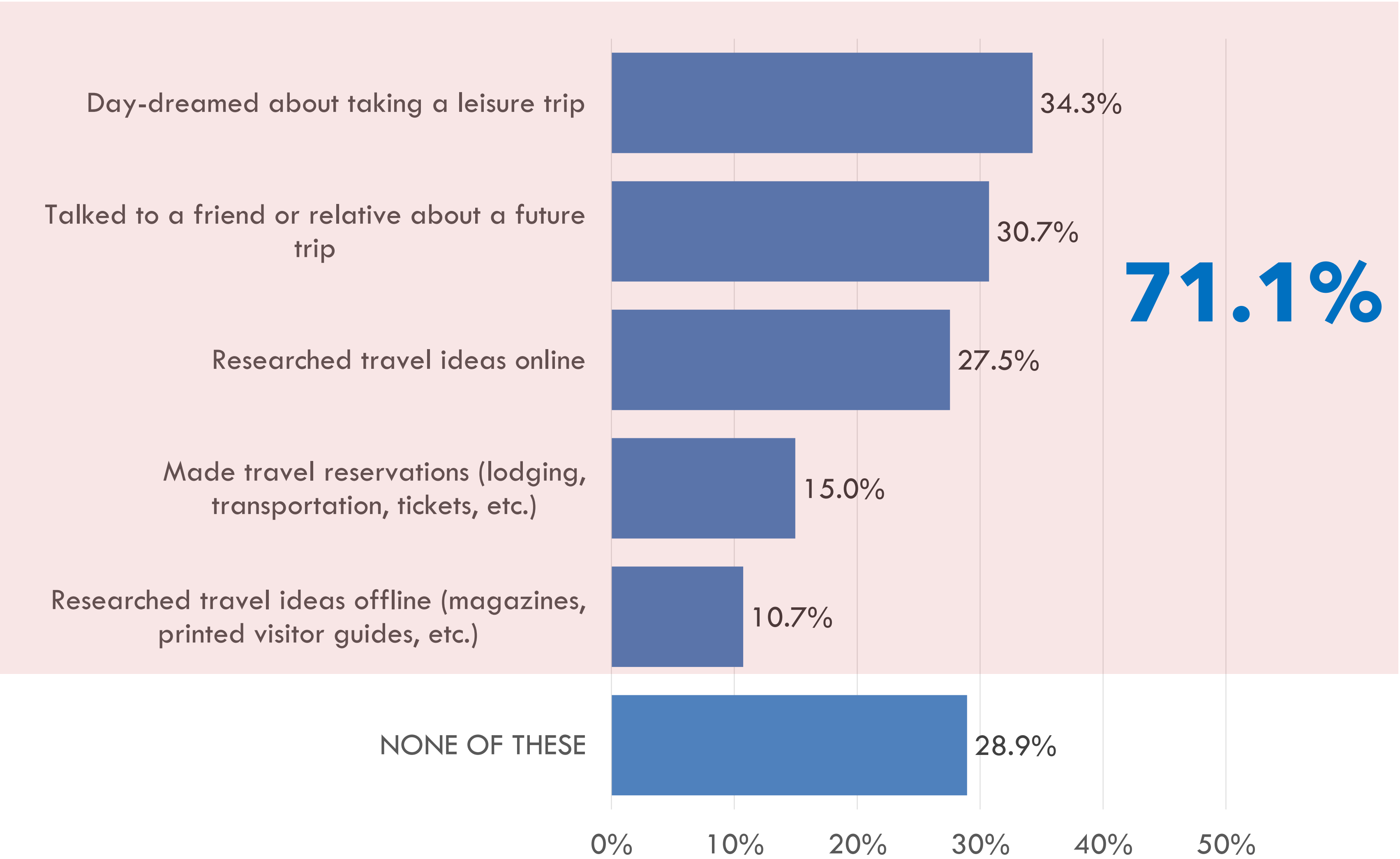


# TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have

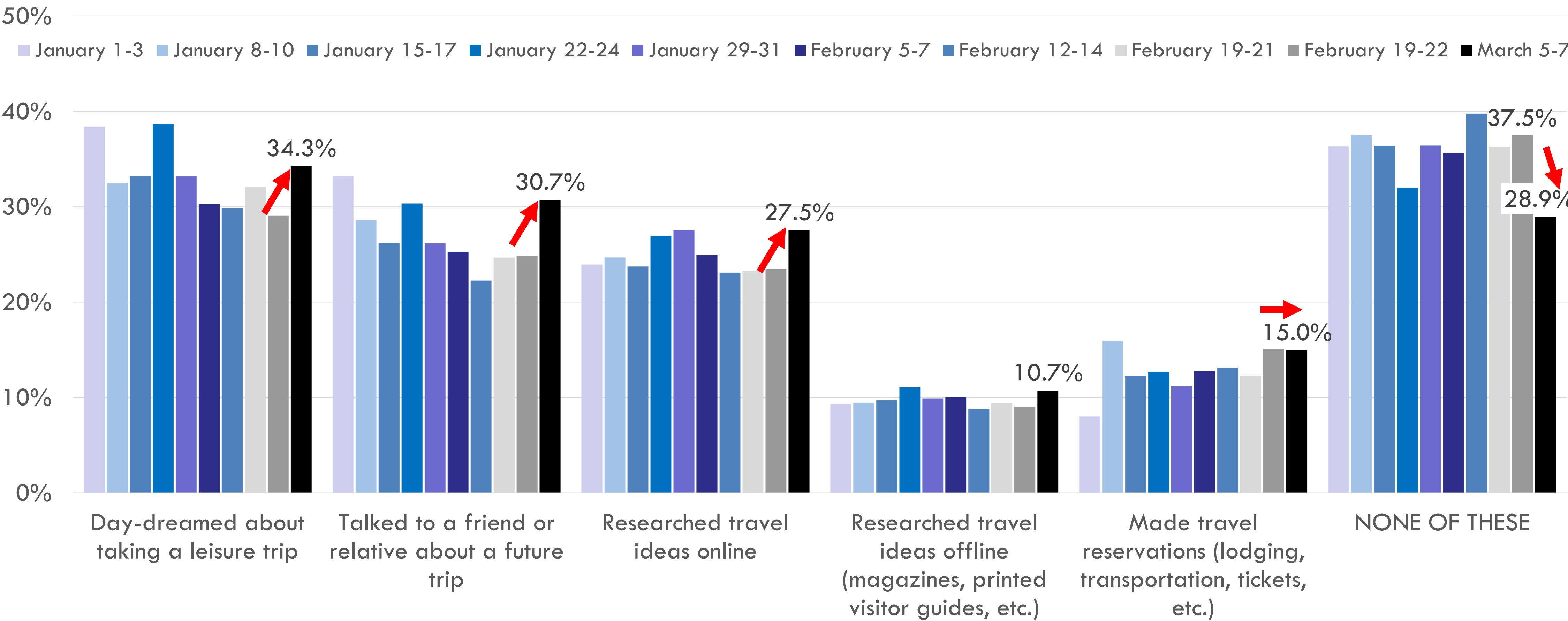
(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)



# 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 \_\_\_\_\_

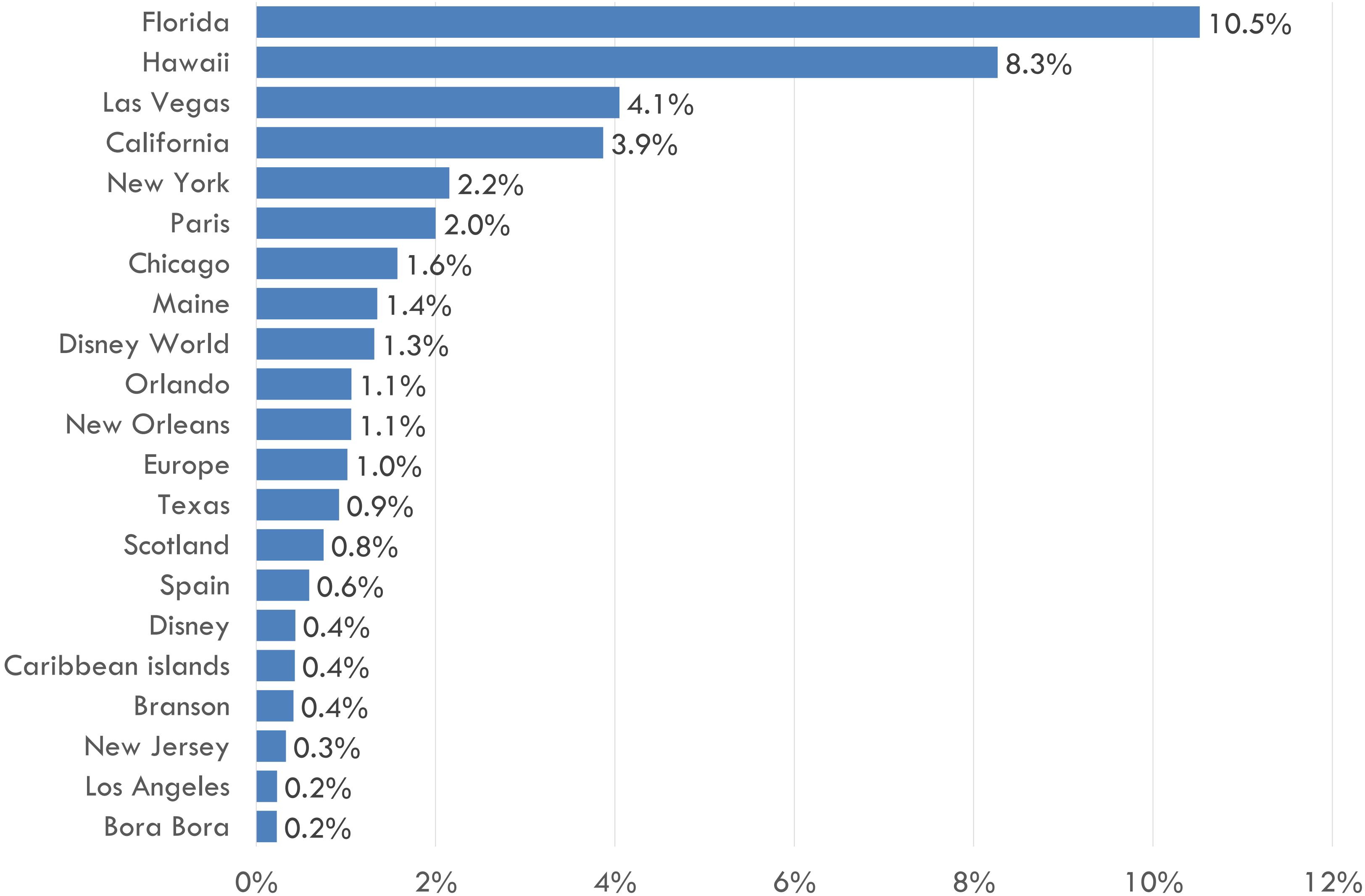




# DESTINATIONS DAY-DREAMED ABOUT

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

(Base: Waves 52 data. Respondents daydreaming about travel destinations, 414 completed surveys. Data collected March 5-7, 2021)



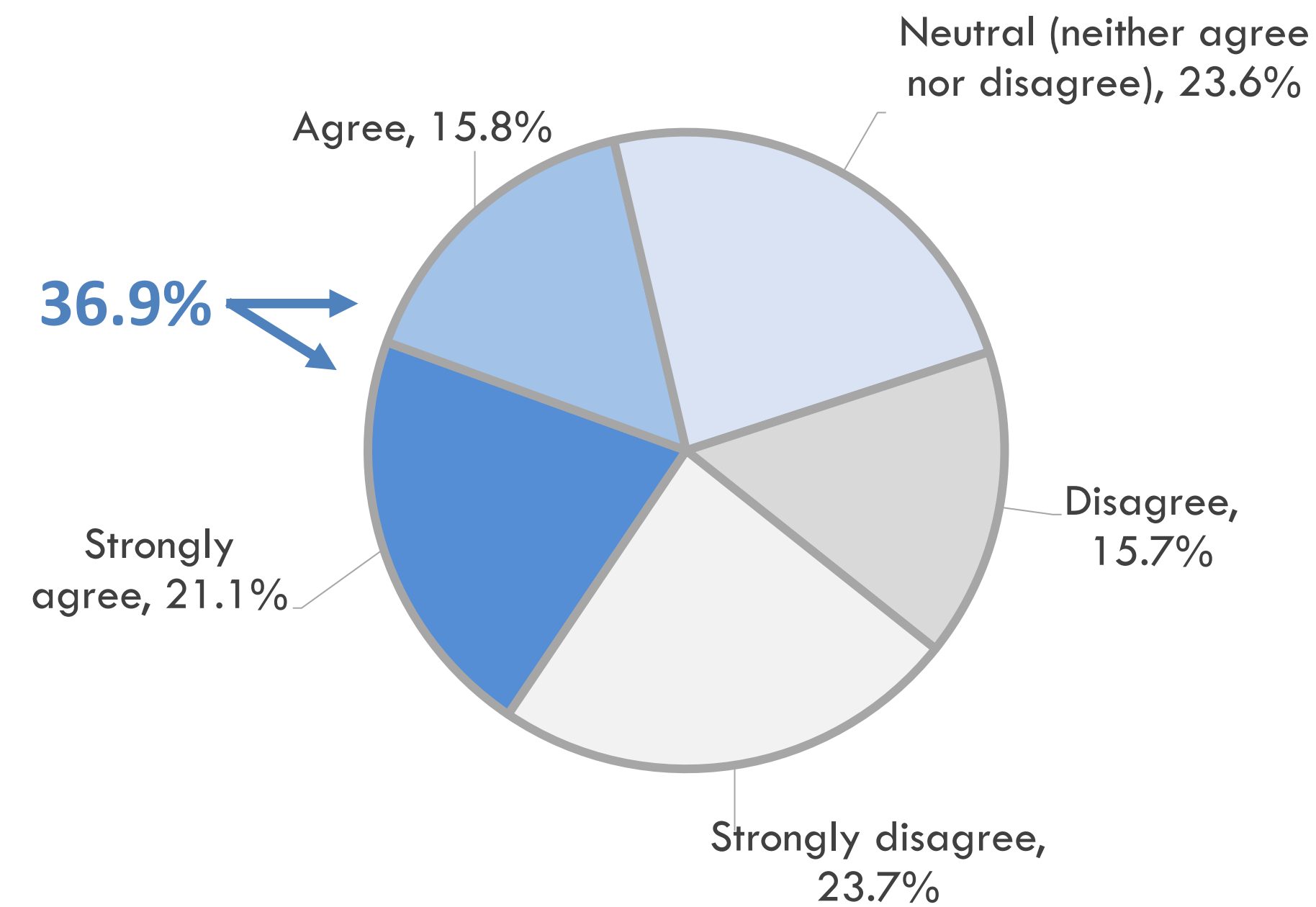


**The proportion of travelers who report that they will wait to get a vaccine before traveling is dropping fast.**

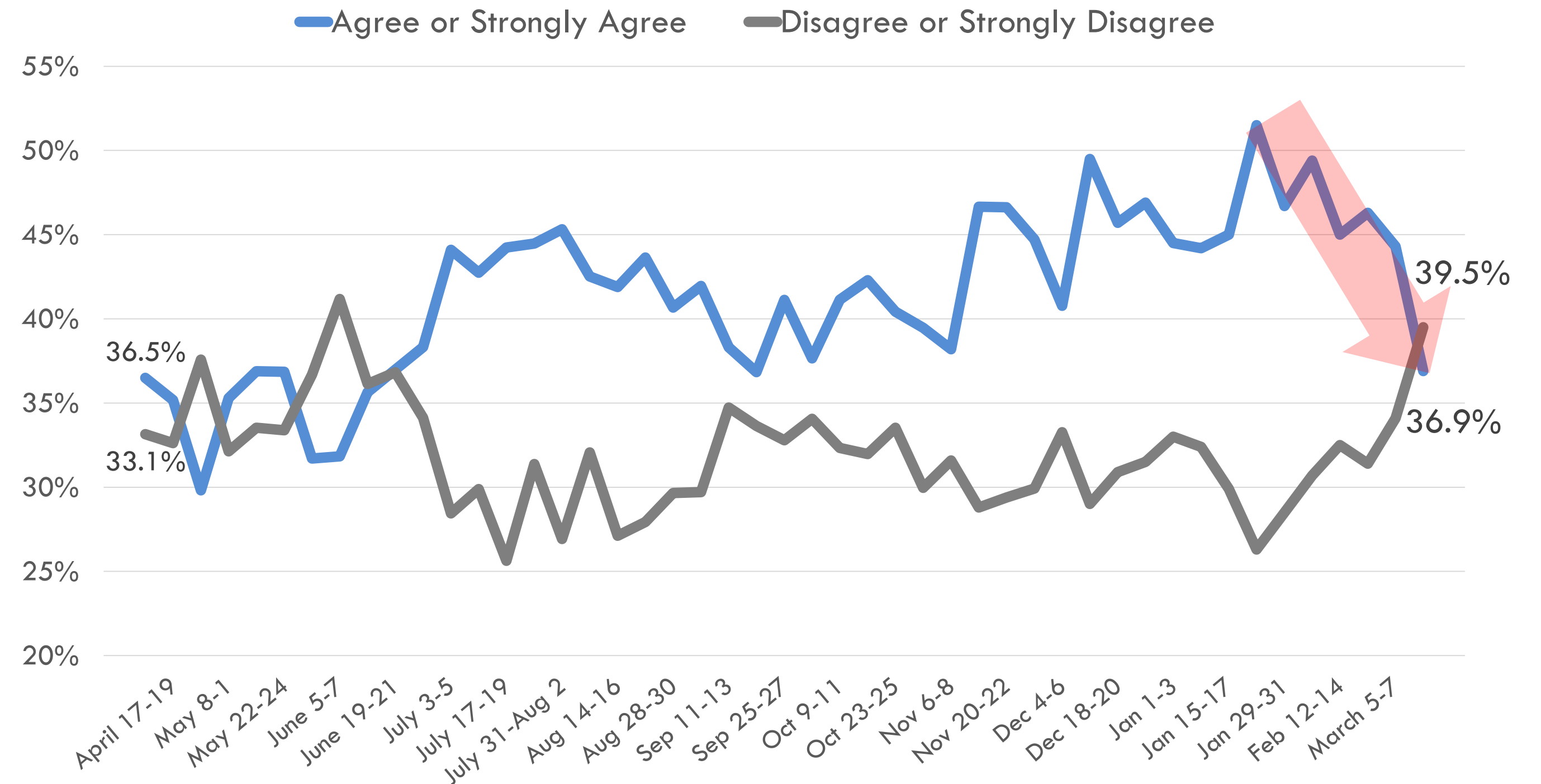
# TRAVEL UNTIL GETTING THE VACCINE

How much do you agree with the following statement?

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



## Historical data



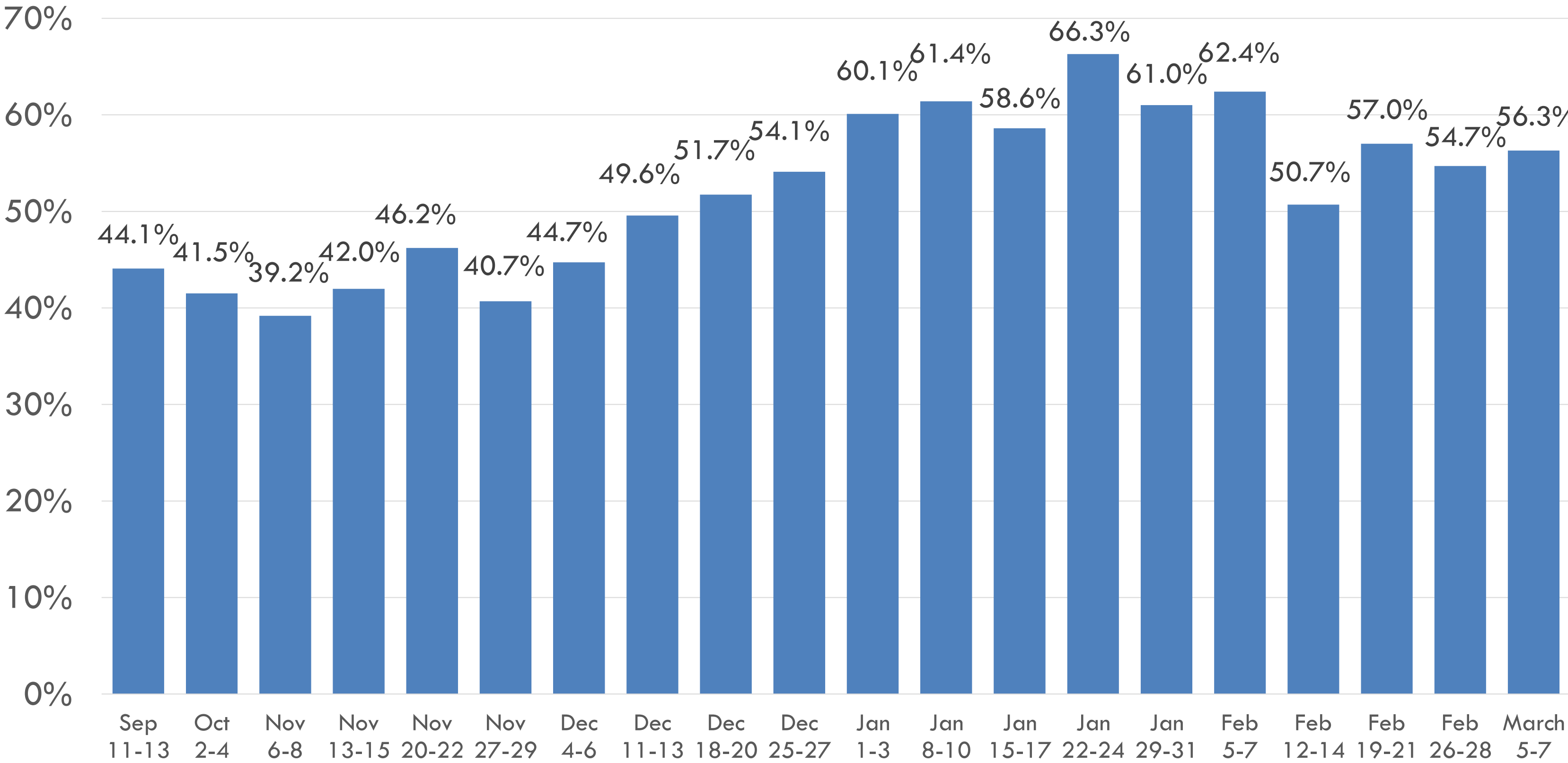


# EXPECTATIONS TO TAKE A COVID-19 VACCINE

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

(Base: Waves 27, 30, 35-52 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 and 1,209 completed surveys.)

% Who Say Yes





# ONE WORD TO DESCRIBE COVID VACCINE

**Question:** What ONE WORD best describes how you feel about taking the COVID-19 vaccine?

*Yes - Will Take Vaccine*

*Maybe*

*No - Will Not Take Vaccine*



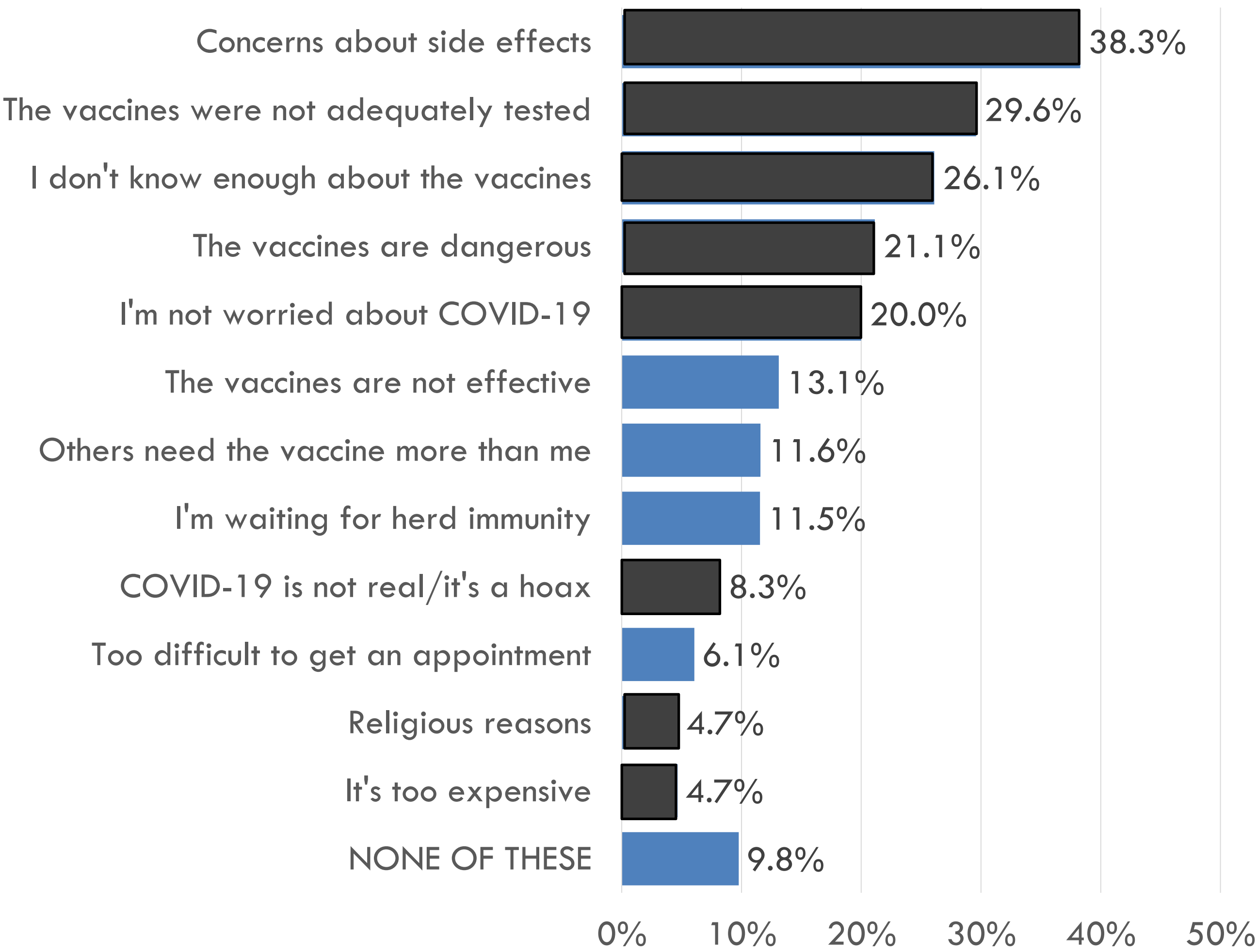


# REASONS THEY WILL NOT TAKE A COVID-19 VACCINE

**Question:** What are the primary reasons you will not take one of the COVID-19 vaccines? (Select all that apply)

(Base: Wave 52 data. Respondents who WILL NOT take a COVID-19 vaccine, 285 completed surveys. Data collected March 5-7, 2021)

Will Not  Take a Vaccine

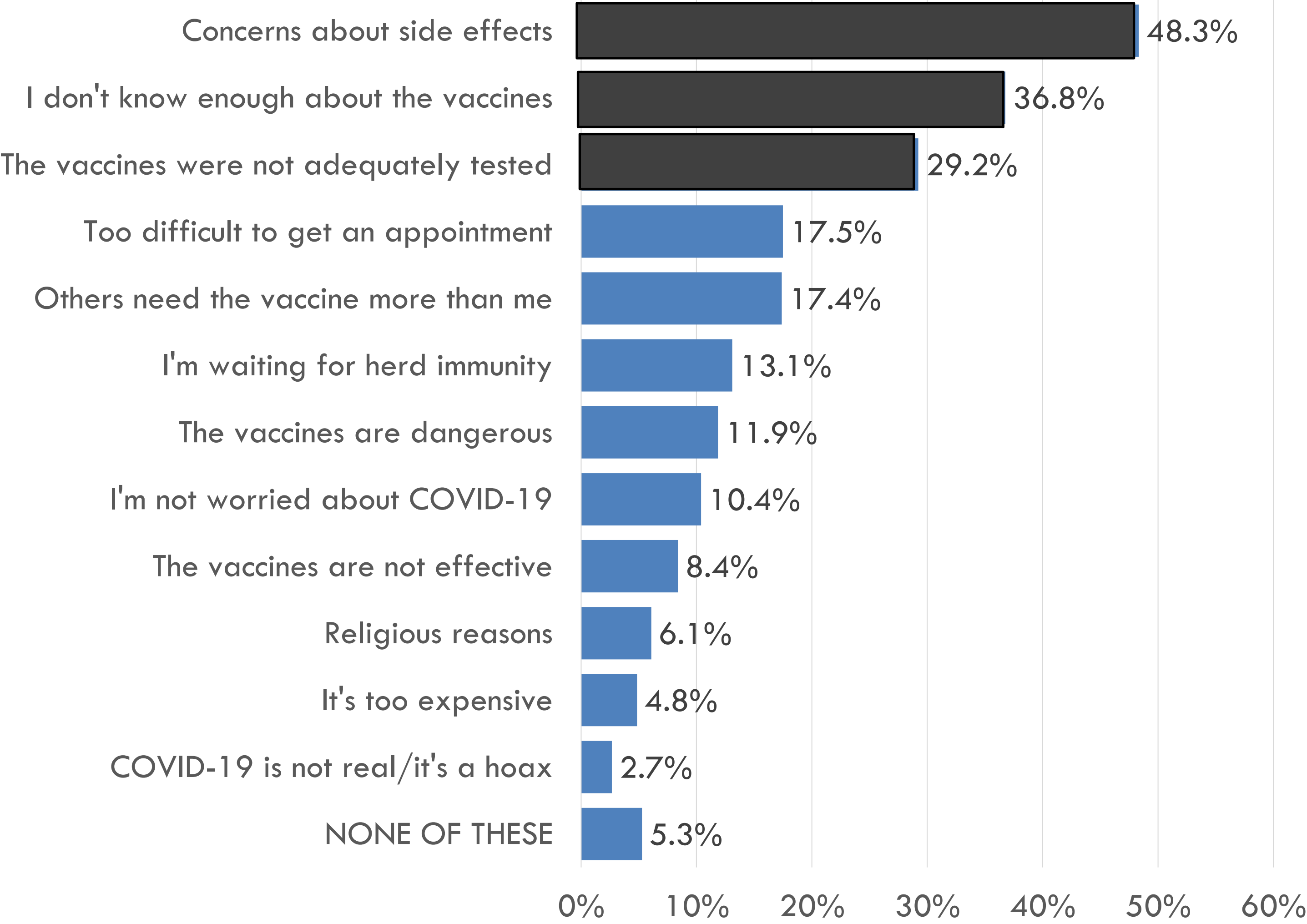
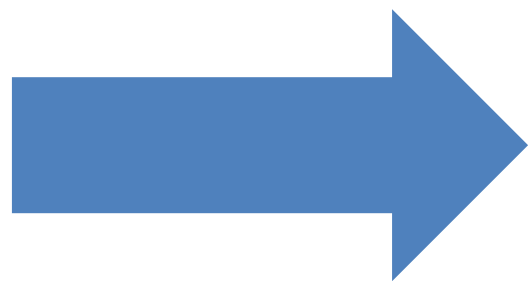




# REASONS FOR BEING UNCERTAIN IF THEY WILL TAKE A COVID-19 VACCINE

**Question:** What are the primary reasons you are not certain if you will take a COVID-19 vaccine? (Select all that apply)

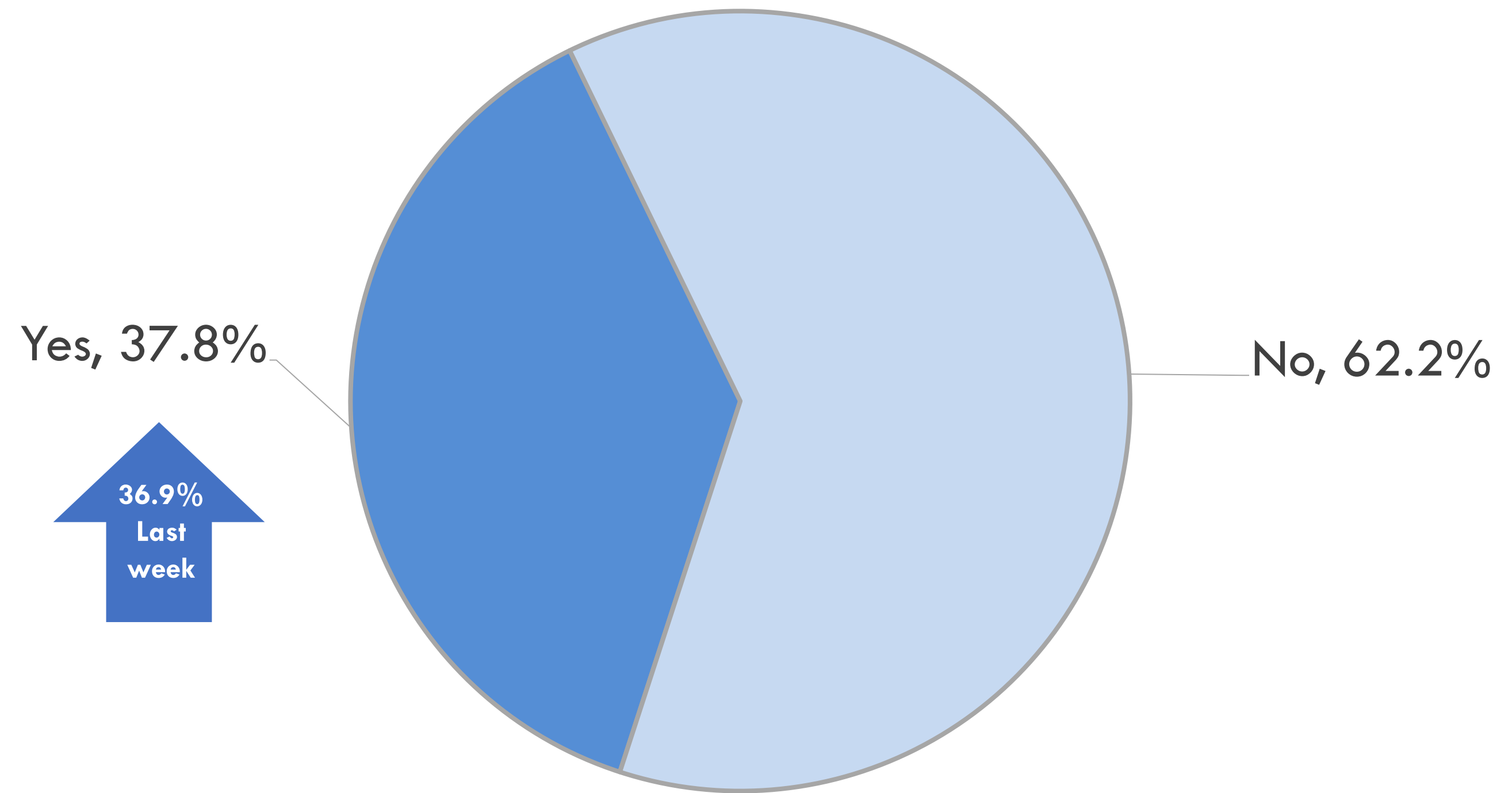
Might  
Take a Vaccine



# TRAVEL PLANS DUE TO COVID-19 VACCINES

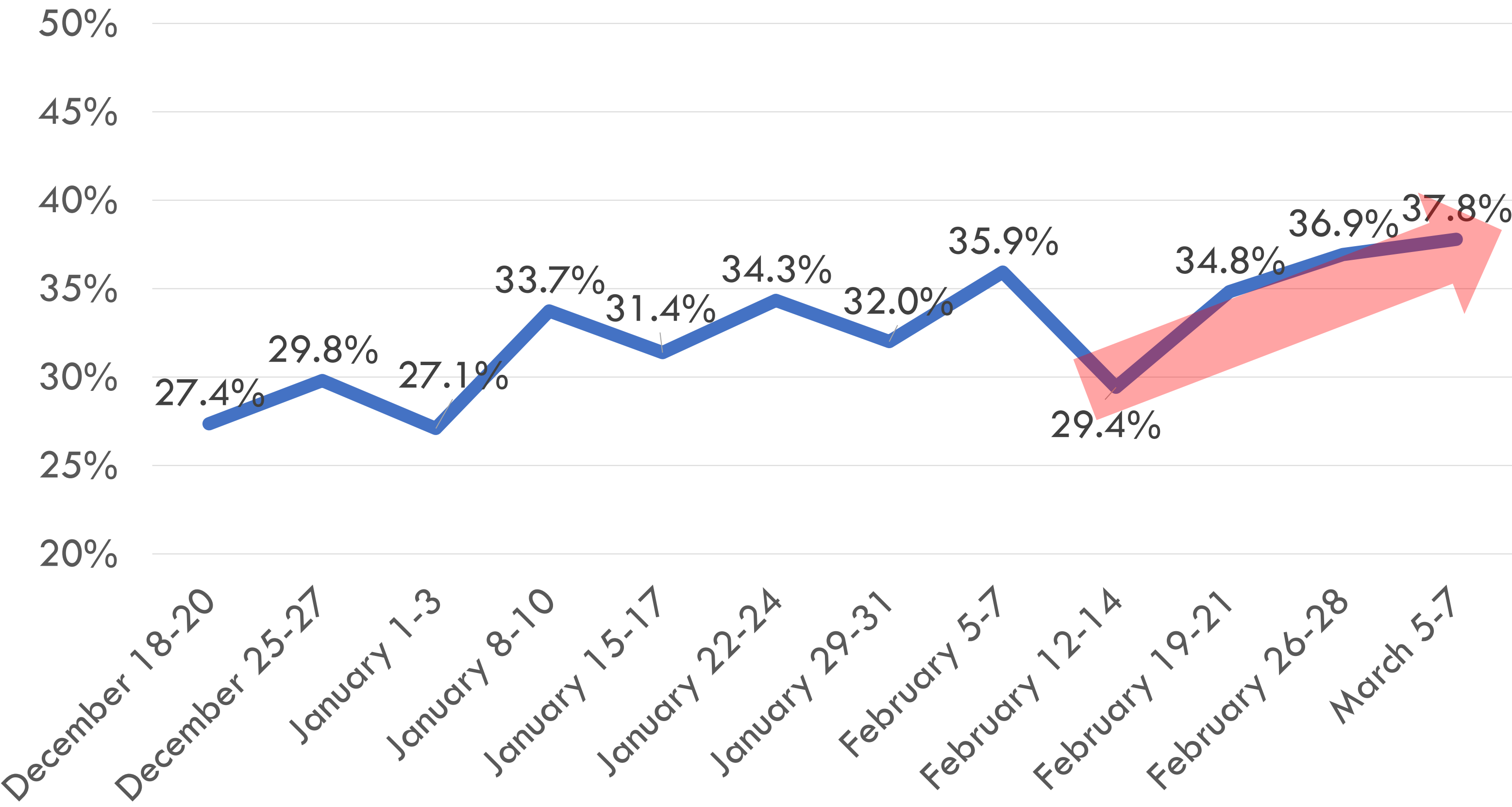
**Question:** Have you begun planning (or booking) any future travel in anticipation of the COVID-19 vaccine being widely available? (Select one)

*(Base: Wave 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)*



# 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)







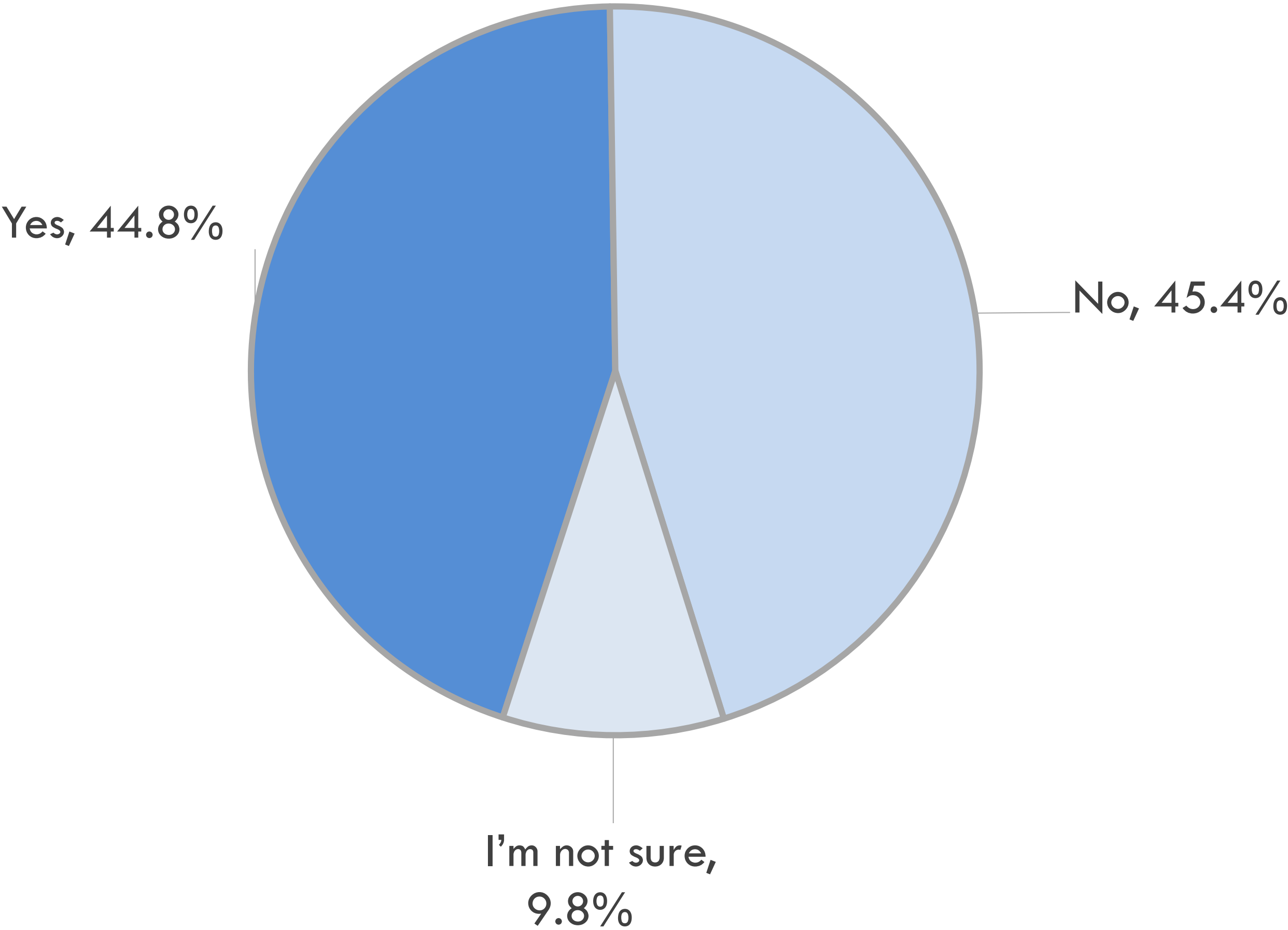
**More travelers report their employers have begun traveling again for business.**

**Many expect changes in business travel policies over the longer-term.**

# BUSINESS TRAVEL AT WORK

**Question:** Prior to the COVID-19 pandemic, did people at the company/organization you work for travel for business purposes? (Select one)

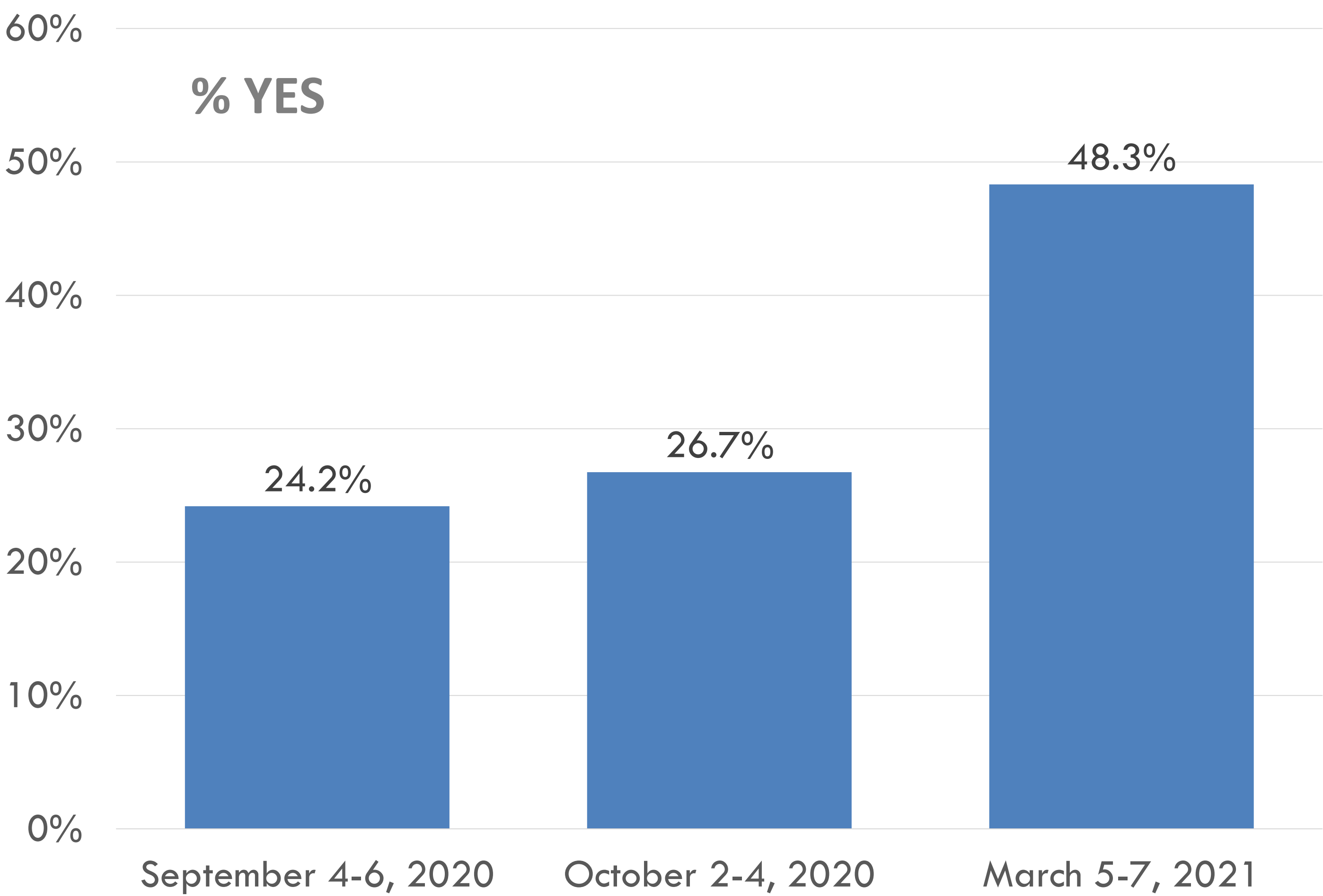
*(Base: Waves 52 data. Employed respondents, 801 completed surveys. Data collected March 5-7, 2021)*



# HAS COMPANY RESUMED BUSINESS TRAVEL?

**Question:** To your knowledge, have people at the company/organization you work for started traveling for business purposes again?

*(Base: Waves 52 data. Employed respondents in companies that traveled for business prior to the pandemic, 357 completed surveys. Data collected March 5-7, 2021)*

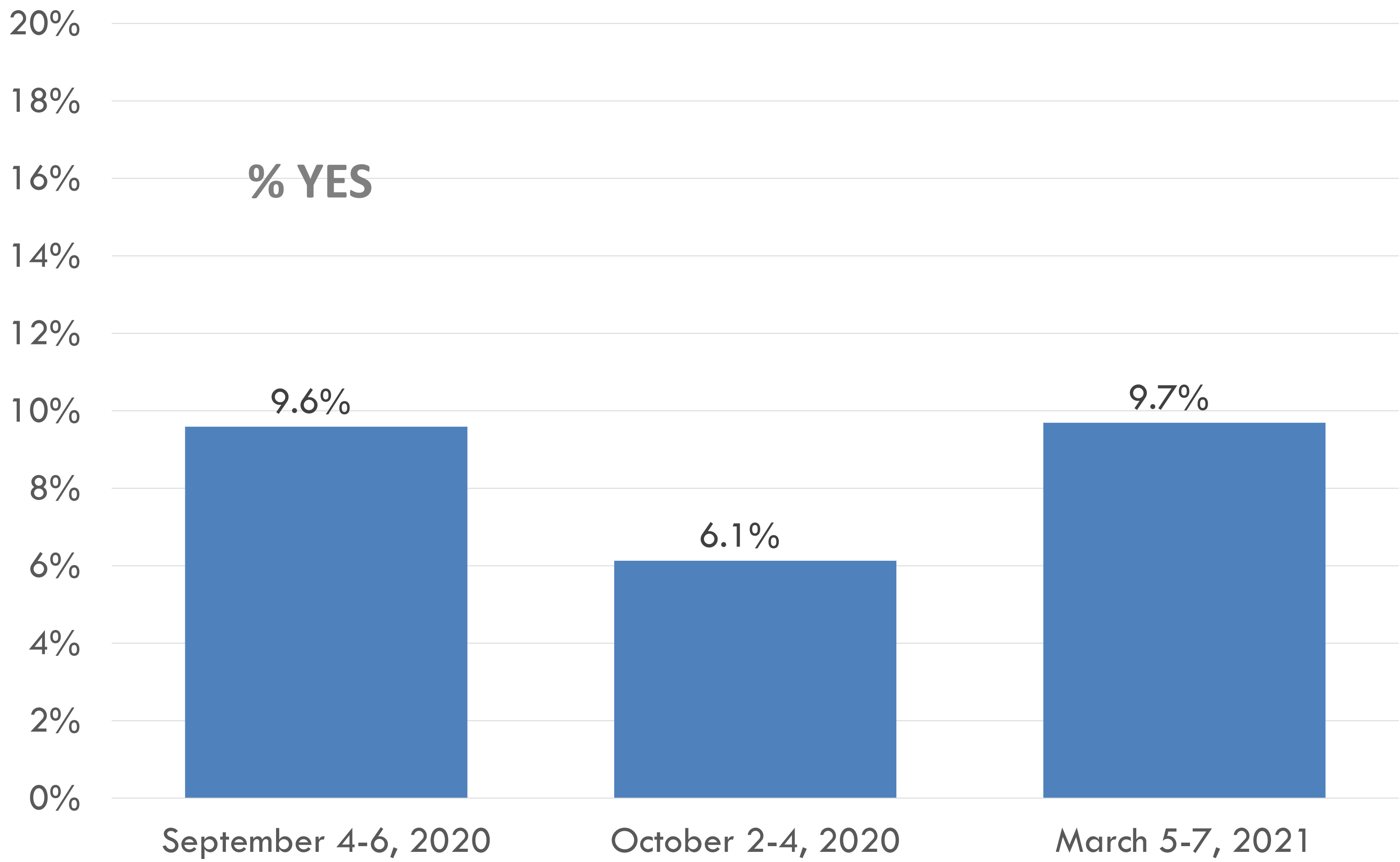




# HAS COMPANY ANNOUNCED WHEN WILL BUSINESS TRAVEL RESUME?

**Question:** Has the company/organization you work for given any indication on when company business travel will begin again?

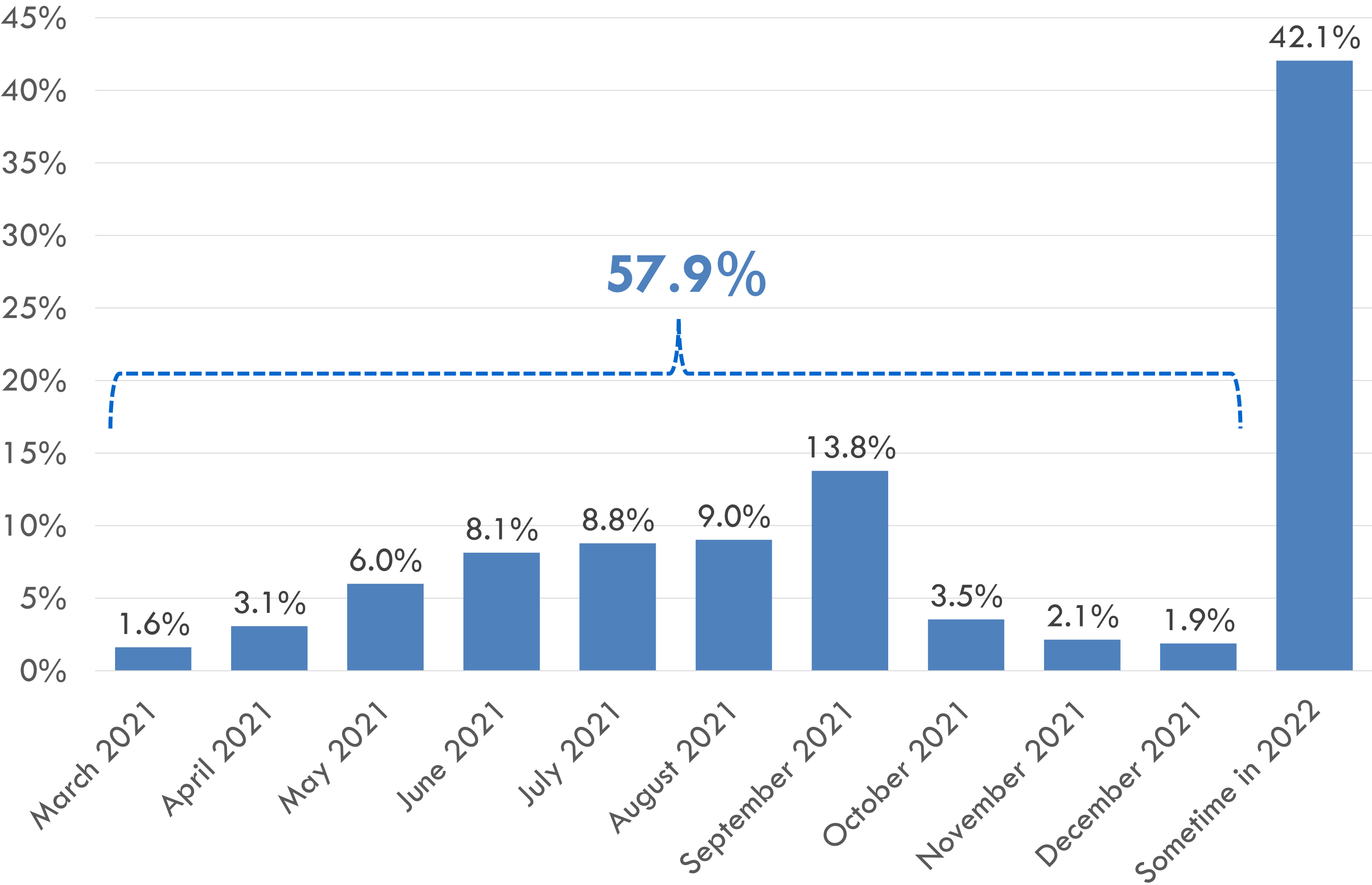
*(Base: Waves 52 data. Employed respondents in companies that traveled for business prior to the pandemic who have not announced a resumption of travel, 194 completed surveys. Data collected March 5-7, 2021)*



# MONTH RESUMPTION OF BUSINESS TRAVEL IS EXPECTED

**Question:** Which month do you anticipate company/organization you work for will begin traveling for business again?

(Base: Waves 52 data. Employed respondents in companies that traveled for business prior to the pandemic who have not announced a resumption of travel, 194 completed surveys. Data collected March 5-7, 2021)

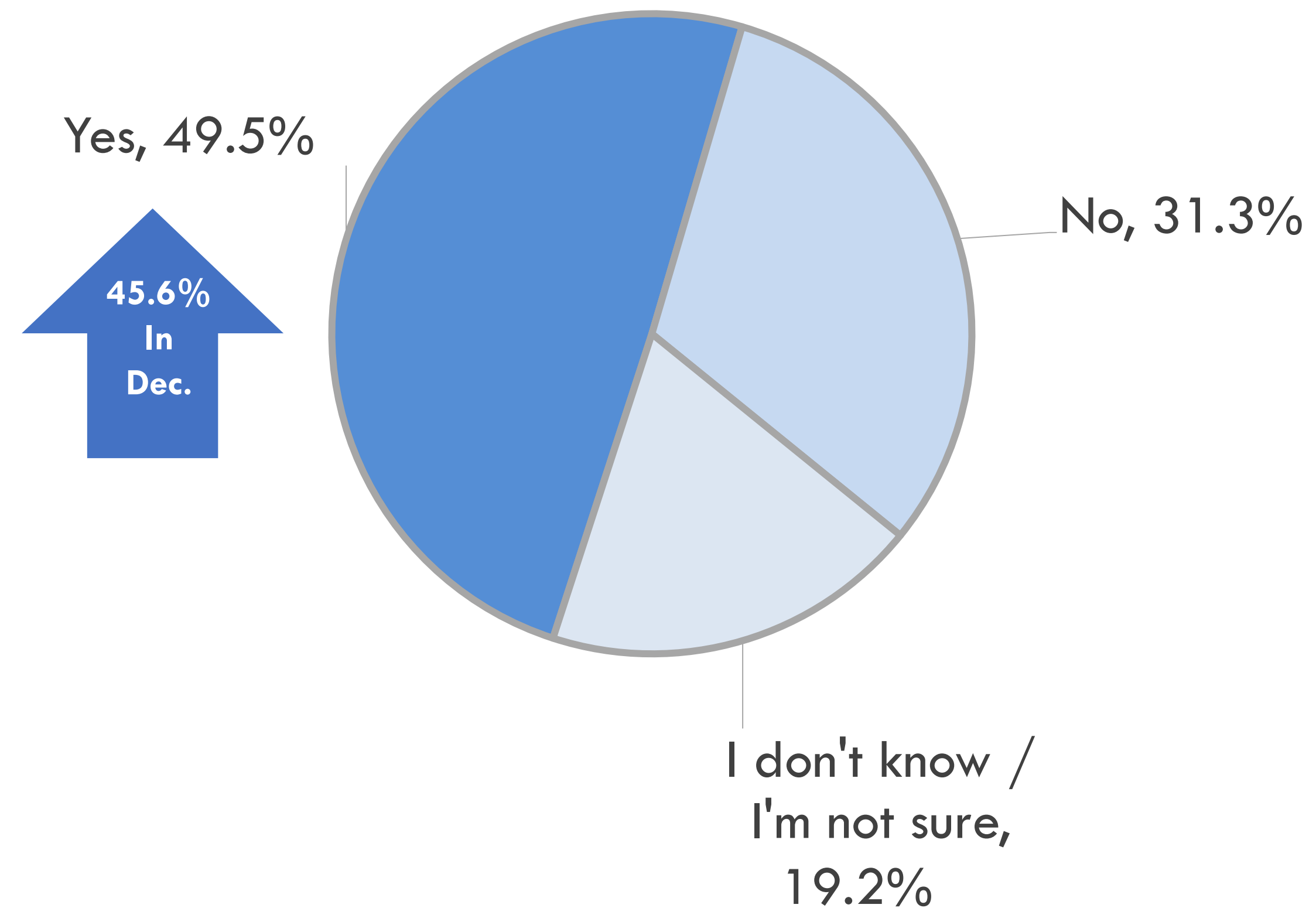


# EXPECTATIONS FOR CHANGED BUSINESS TRAVEL POLICIES

**Question:** You said earlier that you have taken **BUSINESS TRIP(S)** in the past 2 years.

**In the longer-term (2-5 years from now), do you feel the COVID-19 experience will change the way your employer does business travel?**

*(Base: Waves 52 data. Respondents traveling for business in the past 2 years, 386 completed surveys. Data collected March 5-7, 2021)*

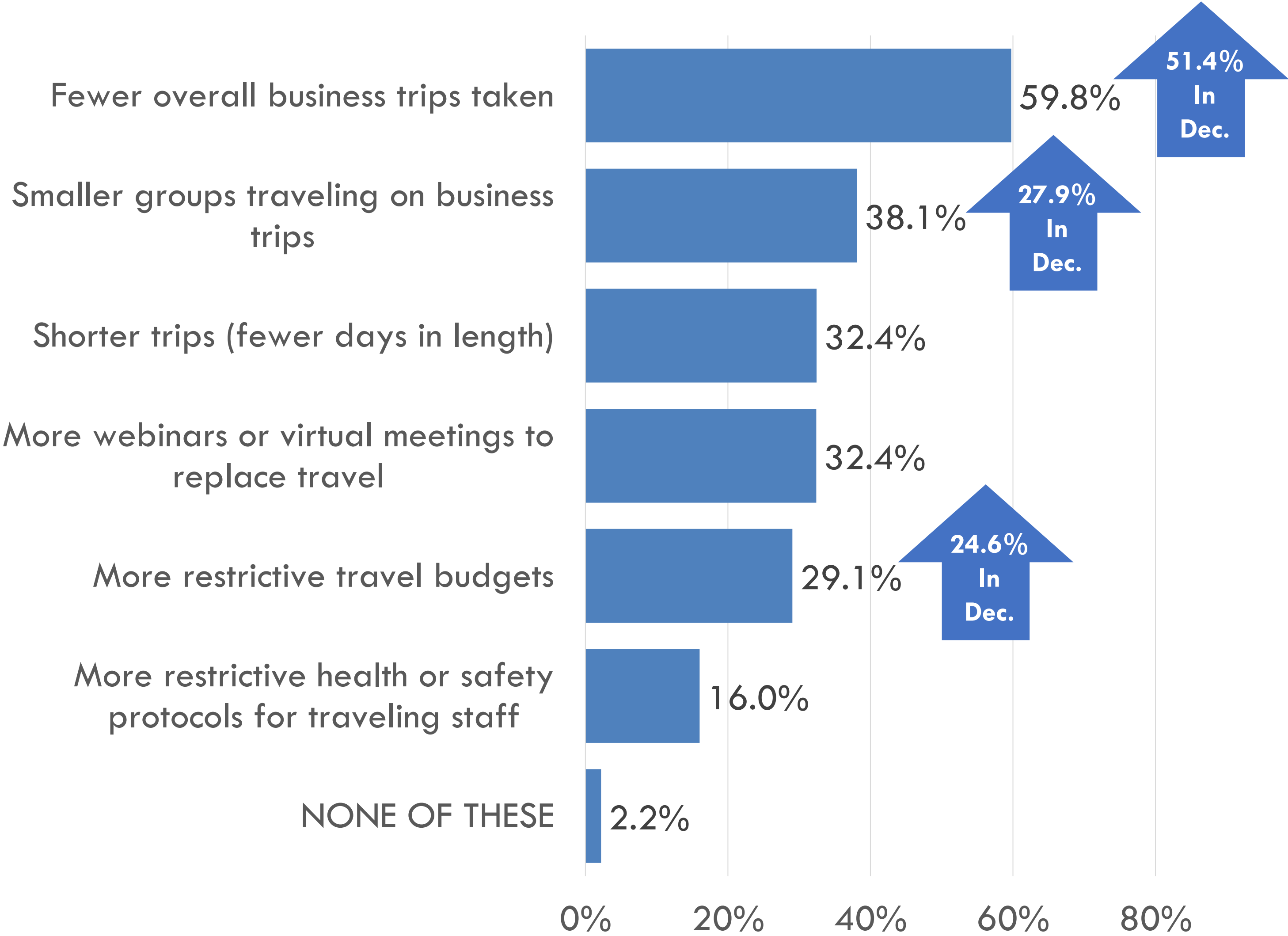




# EXPECTED BUSINESS TRAVEL CHANGES

**Question:** In which of the following ways do you expect your employer will change its business travel over the longer term? (Select all that apply)

(Base: Waves 52 data. Respondents traveling for business in the past 2 years who expect their company to change business travel policies, 193 completed surveys. Data collected March 5-7, 2021)





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

*Looking forward, I hope that I don't have to travel as much for business as I did before the pandemic.*

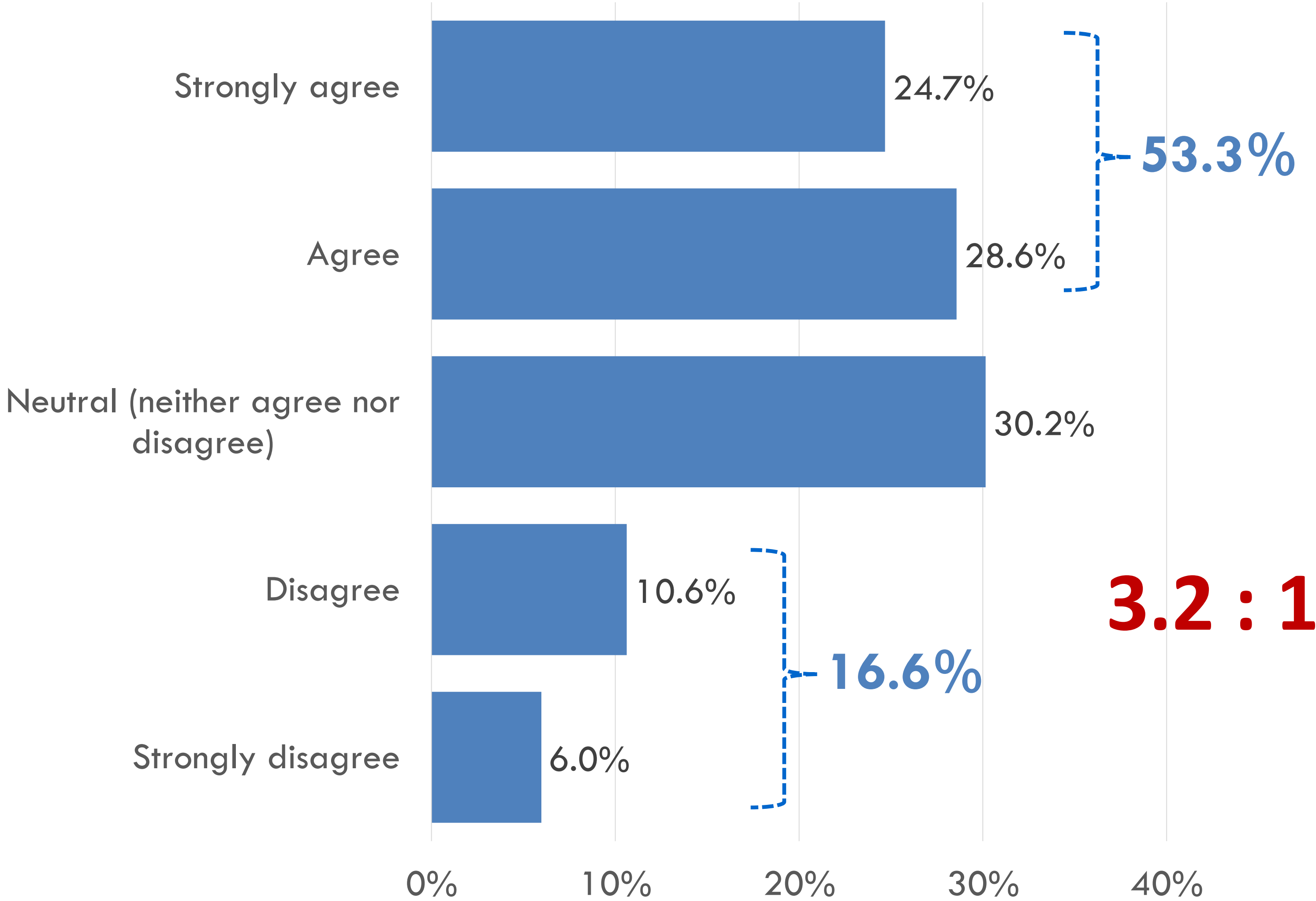


# HOPES TO NOT TRAVEL AS MUCH FOR BUSINESS POST PANDEMIC

**Question:** How much do you agree or disagree with this statement?

**Looking forward, I hope that I don't have to travel as much for business as I did before the pandemic.**

*(Base: Waves 52 data. Respondents traveling for business in the past 2 years, 386 completed surveys. Data collected March 5-7, 2021)*







**Opinions are mixed on recent decisions by governors to fully re-open their states for business right now.**

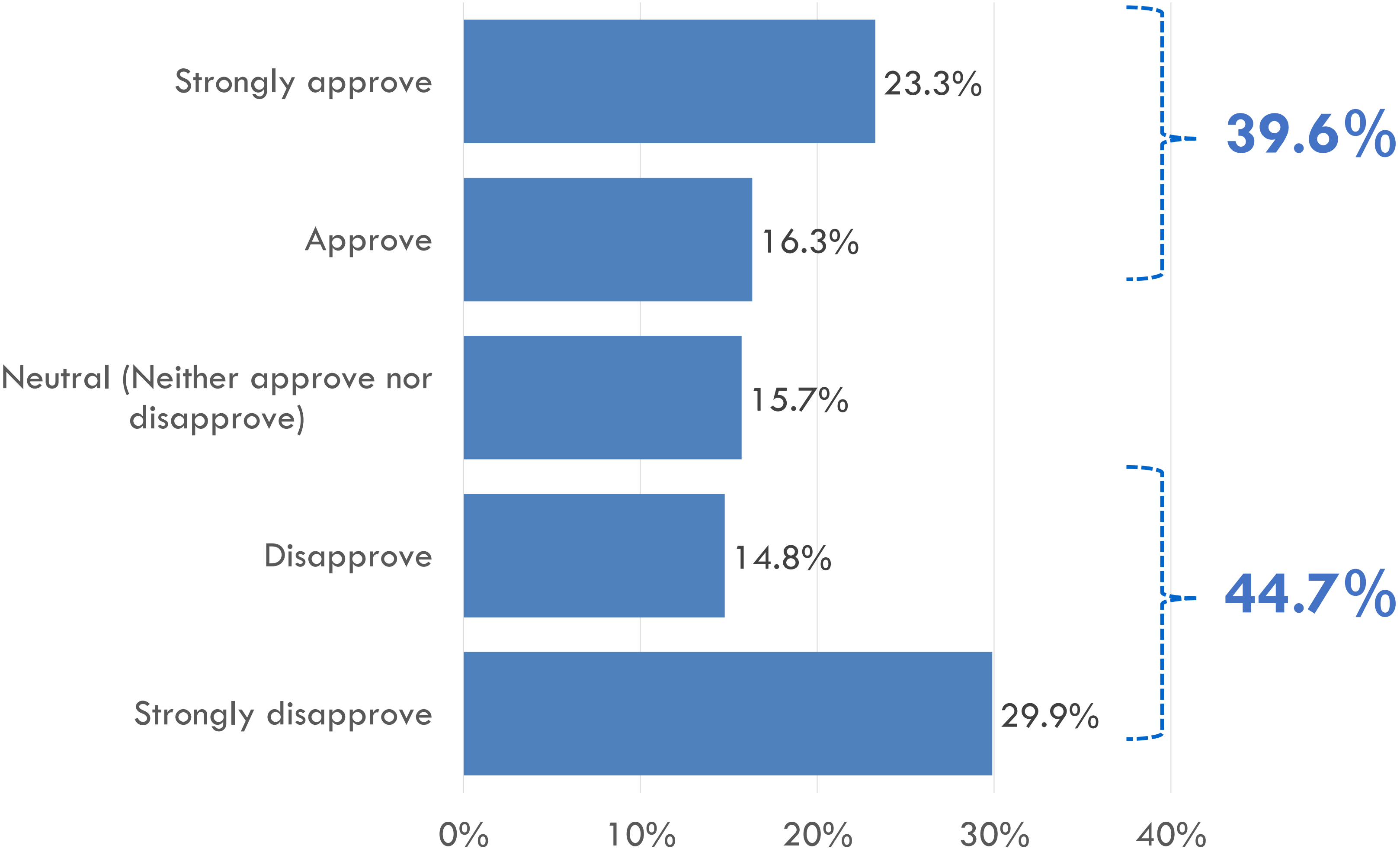


# OPINIONS ON STATES RE-OPENING FULLY NOW

**Question:** Earlier this week, the governors of the states of Texas and Mississippi lifted coronavirus restrictions, doing away with mask mandates and allowing all businesses to operate at 100 percent capacity.

**How do you feel about this change in policy?**

*(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)*

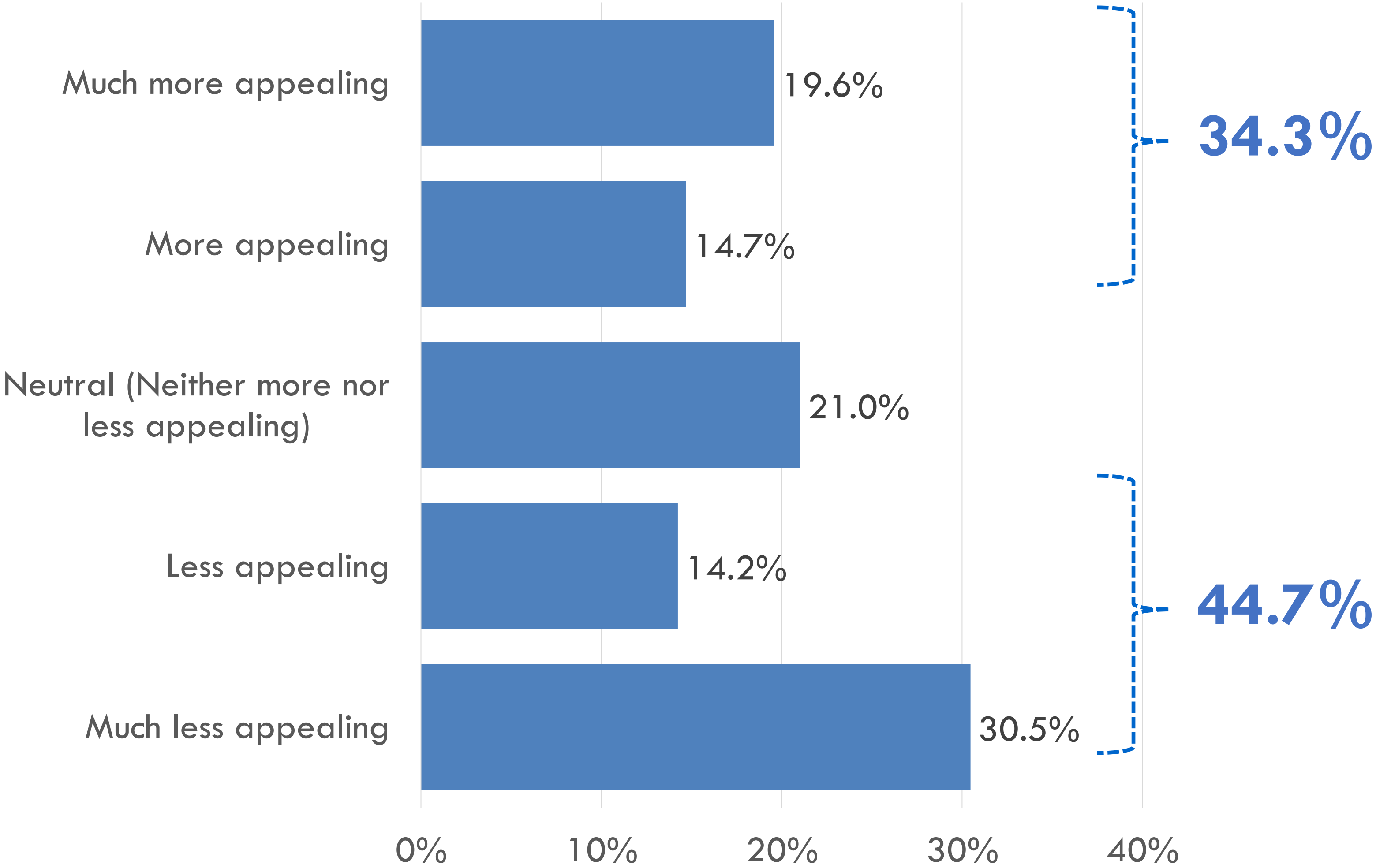


# STATE RE-OPENINGS AND DESTINATION APPEAL

**Question:** All else equal, if a state fully lifted its coronavirus restrictions now, would this make that state a more or less appealing destination to visit? (Select one to complete the sentence)

Lifting coronavirus restrictions now would make a state a \_\_\_\_\_ place to visit

(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)





# ONE WORD TO DESCRIBE STATES REOPENING FULLY NOW

**Question:** What ONE WORD best describes the policy of states lifting all coronavirus restrictions now?

## Policy Makes These States More Appealing (as a travel destination)



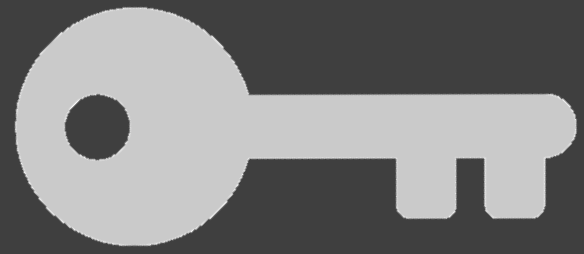
## 34.3% of all travelers

## Policy Makes These States Less Appealing (as a travel destination)



## 44.7% of all travelers





## FINAL THOUGHT

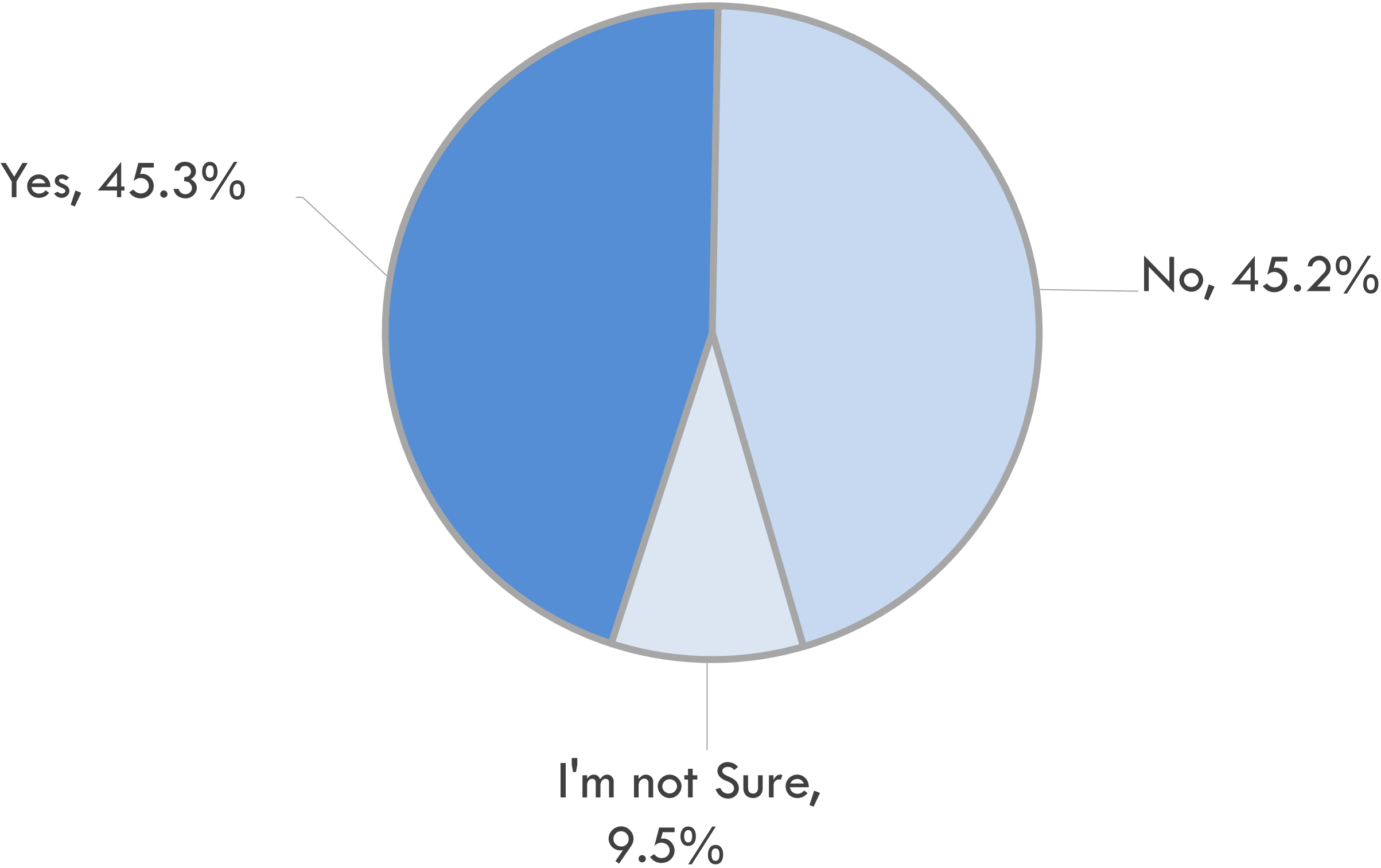
**It doesn't appear that the pandemic has led travelers to give up on the traditional visitor information center model.**



# PAST USE OF VISITOR INFORMATION CENTERS

**Question:** On any of your domestic trips in the PAST FIVE (5) YEARS, have you ever gone to a Visitor Information Center (i.e. a physical location that provides tourist information to visitors)?

*(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)*

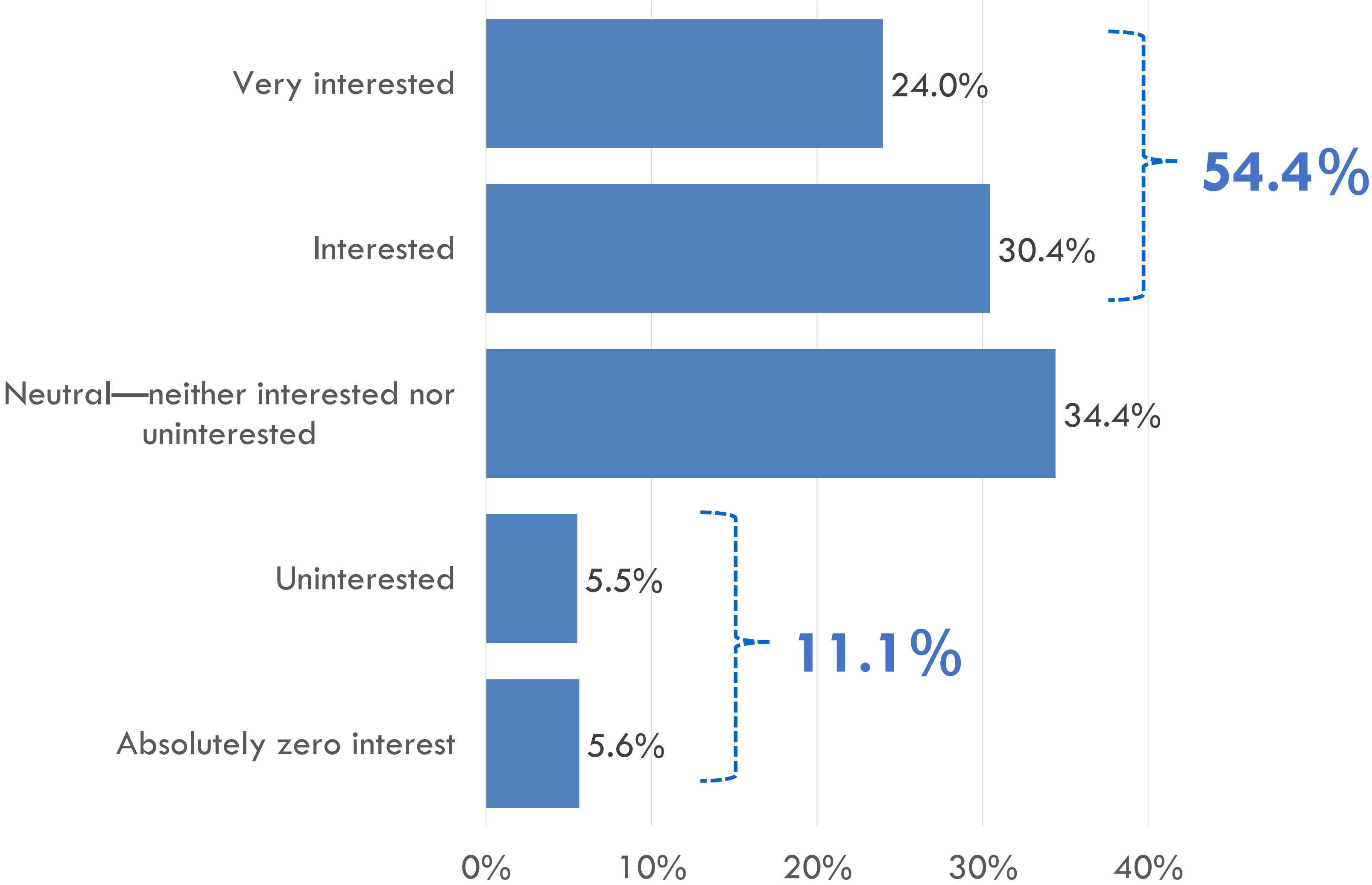




# INTEREST IN USING VISITOR INFORMATION CENTERS THIS YEAR

**Question:** How interested would you be in using a Visitor Information Center on any of your domestic trips in this year?

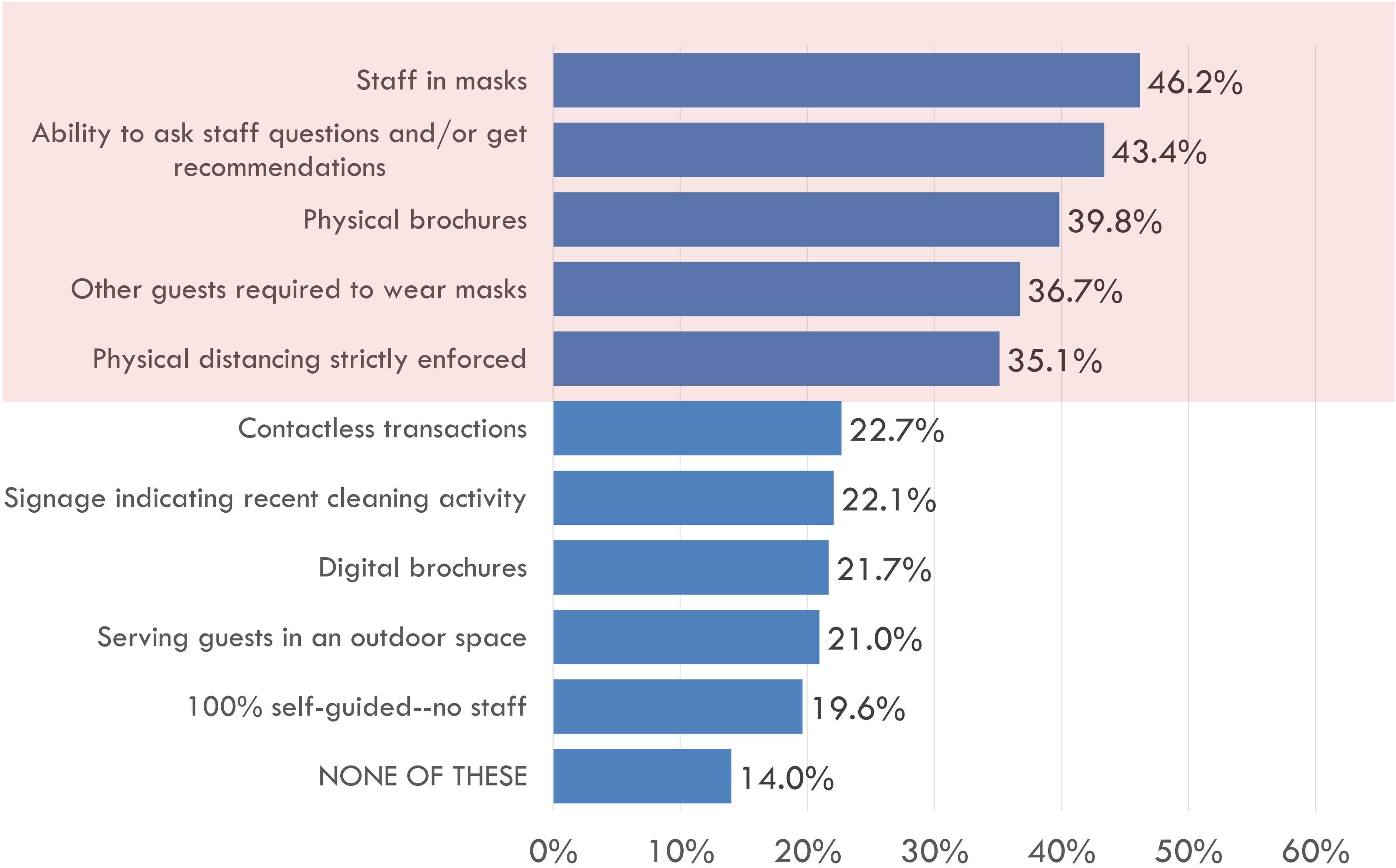
*(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)*



# SERVICES DESIRED IN VISITOR INFORMATION CENTERS

**Question:** If you traveled in the NEXT SIX (6) MONTHS, which of these would you want in a Visitor Information Center?

(Base: Waves 52 data. All respondents, 1,209 completed surveys. Data collected March 5-7, 2021)







## Travelers Interested in Using Visitor Information Centers

- Agree that discounts make them more interested in traveling in the near term and are more budget conscious
- Nearly half have started planning future travel in anticipation of the vaccine being widely available
- The vast majority have done some kind of travel dreaming and/or planning in the last week
- Likely to consider spending on leisure travel to be a high priority
- More likely to have traveled internationally and on an escorted group tour in the past 2 years
- Are affluent, live in urban areas and are the parents of school-aged children



# TAKEAWAYS

1

Enthusiasm for travel is on a roll, moving forward nicely again this week.

2

Reported booking behaviors are still muted, but travel dreaming and planning reached a pandemic record.

3


The proportion of travelers who report that they will wait to get a vaccine before traveling is dropping fast.

4

More travelers report their employers have begun traveling again for business. Many expect changes in business travel policies over the longer-term.

5

Opinions are mixed on recent decisions by governors to fully re-open their states for business right now.



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**[DestinationAnalysts.com/Support](https://DestinationAnalysts.com/Support)**

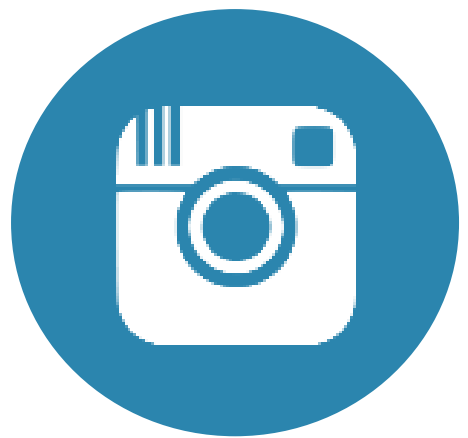
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<http://tech.dmawest.org/>

**March 10th at 10:30am PT**

***The Future of Visitor Guides: How COVID is Shaking Up the Printed Visitor Guide vs. eBook Debate and What It Means for Your DMO***

**March 11th at 9:00am PT**

***Maximizing the Utility of Geo-Location Data***



# MORE RESEARCH WE CAN PROVIDE

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

[info@destinationanalysts.com](mailto:info@destinationanalysts.com)





An astronaut in a white spacesuit stands on a dark, rocky surface, looking out over a vast, fiery orange and yellow sky filled with clouds. The scene is backlit by a bright light source, creating a silhouette effect on the astronaut and the foreground.

# Destination APOLLO

Destination Intelligence + Management System





**Presentation deck and webinar  
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