

# CORONAVIRUS TRAVEL SENTIMENT INDEX REPORT, WAVE 44

## RESEARCH FINDINGS

January 11, 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 44<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 44th wave of this survey was collected from January 8<sup>th</sup> – 10<sup>th</sup>,** 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, 1,225 fully completed surveys were collected, suggesting the topline results presented here have a confidence interval of +/- 2.8%.

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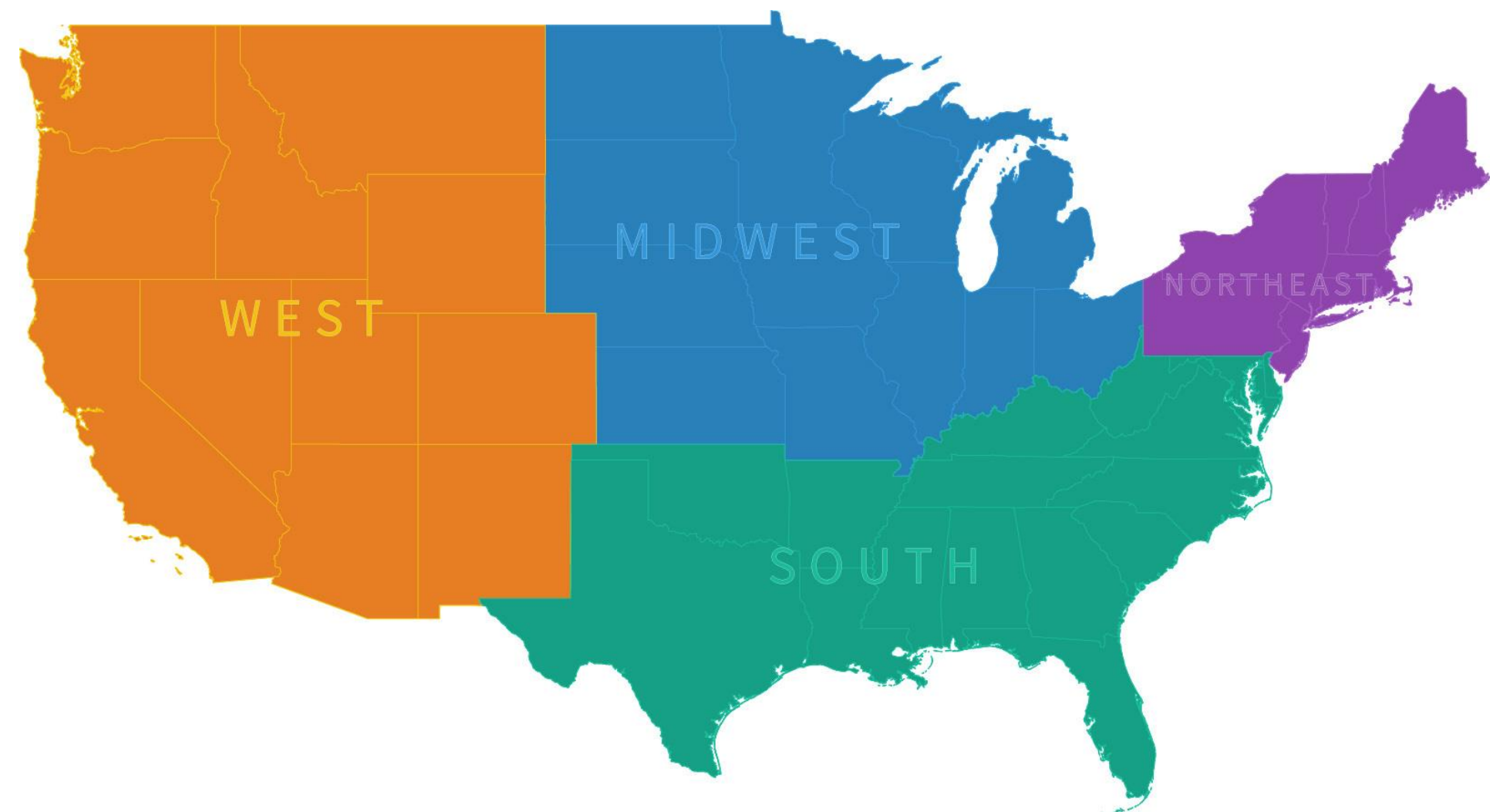


# PROJECT OVERVIEW

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

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

Map of U.S. Showing Survey Regions:

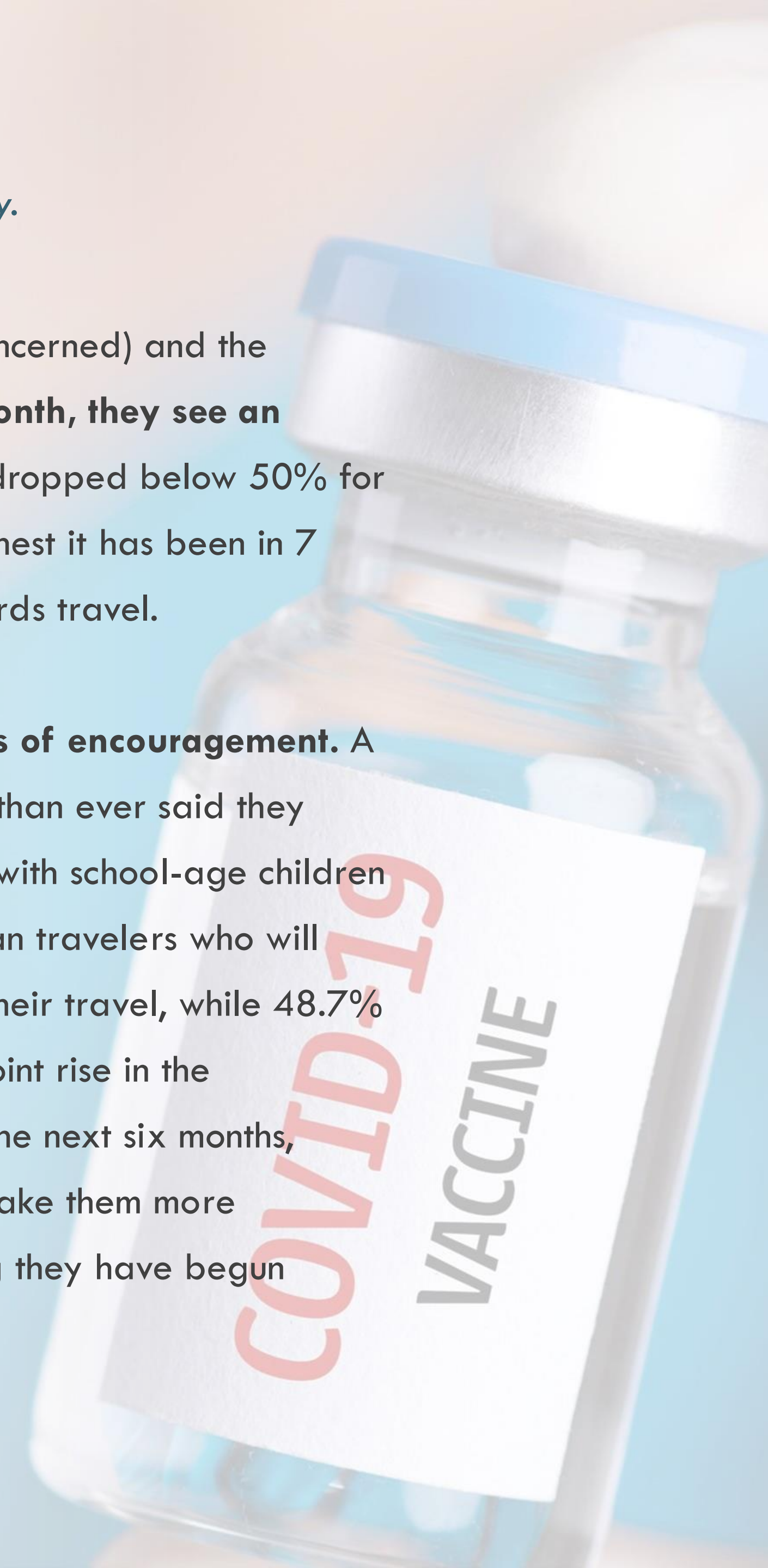


	Data collection	Report release
Wave #1	March 13-15	March 16
Wave #2	March 20-22	March 23
Wave #3	March 27-29	March 30
Wave #4	April 3-5	April 6
Wave #5	April 10-12	April 13
Wave #6	April 17-19	April 20
Wave #7	April 24-26	April 27
Wave #8	May 1-3	May 4
Wave #9	May 8-10	May 11
Wave #10	May 15-17	May 18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

# TOP TAKEAWAYS

*The following are the top takeaways that emerged from Wave 44 of this weekly consumer traveler sentiment tracking study.*

- Across the country, anxiety was up this week, particularly about personally contracting COVID-19 (72.5% highly concerned) and the pandemic's impact on the national economy (85.1% highly concerned). But **as Americans look out over the next month, they see an improving situation**—the percent of Americans who feel the pandemic will get worse in the U.S. in the next month dropped below 50% for the first time since the week of October 12th, and the percent who feel things will get better rose to 24.9%, the highest it has been in 7 months, since the week of June 8th. For the travel industry, this resulted in a delightful shift in positive sentiment towards travel.
- **Undoubtedly, the availability and ongoing distribution of COVID-19 vaccines are a contributor to these feelings of encouragement.** A high of 67.8% of American travelers believe the COVID-19 vaccines are safe. Last week, more American travelers than ever said they would be getting vaccinated against the virus, and this week that figure rose again to 61.4%. The percent of those with school-age children who say they will inoculate their kids increased to 53.2%, after being below half for the last 6 weeks. Most American travelers who will take a COVID-19 vaccine believe they will get their doses in the first half of this year. In terms of how this impacts their travel, while 48.7% still say they will engage in some travel avoidance until vaccines are widely available, there was a 5 percentage point rise in the proportion of American travelers who say the vaccines make them more optimistic about life returning to normal in the next six months, which is now at 61.9%. There was a similar increase in the proportion of American travelers who say the vaccines make them more optimistic about being able to safely travel in the next six months, as well as a rise in the number of travelers saying they have begun planning and booking trips specifically in anticipation of vaccines being available—now at 33.7%.



# TOP TAKEAWAYS

- **Amongst the most critical indicators of Americans' path to a travel norm is the plummet in perceptions of travel activities as unsafe.** This week, an average of 50.1% perceive the travel and leisure activities we track as unsafe, which is within 0.9% of where this metric was March 15th and the lowest it has been since that date. More Americans are confident they can travel safely now, rising to 31.8% from 24.7% last week. Loss of interest in travel for the time being declined to 42.5%, down from a high of 49.5% one month ago. Those whose normal travel patterns were disrupted by the pandemic are now missing travel even more, with nearly two-thirds saying they miss traveling "very much." Americans' openness to travel inspiration reached a pandemic-period peak, measuring 6.0 on a scale of 0-10. Those in a travel readiness state-of-mind soared nearly 12 percentage points to 58.6%, also the highest it has been in the pandemic. Excitement levels about travel in 2021 grew to 6.1 from 5.8 last week.
- **As Americans plan their travel for 2021, July is still the peak month, with 27% saying they have at least tentative plans to travel then.** Right now, 31.4% of American travelers anticipate their next air trip to be in the first half of the year. The traumatic events of last week may have disrupted the amount of time devoted to travel dreaming (there was a small decline in those that said they had day-dreamed about travel in the last week), although twice as many report having actually made travel reservations last week than the week prior (15.9% up from 8.0%). When it comes to travel in the next three months, more Americans are seeing this as a reality. This week, 48.9% say they will take at least one leisure trip in the next 12-weeks, up from 37.5%. Of those Americans who will travel, they anticipate 1.7 overnight trips on average, largely within 250-miles of where they live. Although the average anticipated spending on travel in this period has increased to \$1,398, 50.5% report they will be more budget conscious. In fact, 43.0% of all American travelers say discounts and price cuts can motivate them to take a trip they had not previously considered—a 43-week high.

# TOP TAKEAWAYS

- With the important increase in Americans' desire for travel inspiration, travel marketers will be keen to reach them. This week, we asked American travelers which channels they were most receptive to learning about destinations to visit. **While online content found through search engines, email and travel/lifestyle magazines are good bets across generations, streaming video services and social media are key for inspiring younger travelers.**
- It's also essential to track how Americans are feeling about travel to and within their own communities. **This week, 43.8% feel comfortable going out for leisure in their own community, the highest this has been in 2 months.** While 53.5% still do not want visitors to their communities right now, the percent that that said they would be happy if they saw an advertisement promoting their community as a place for tourists to come visit when it is safe hit 40.3%—another metric to hit a pandemic-period high this week.

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

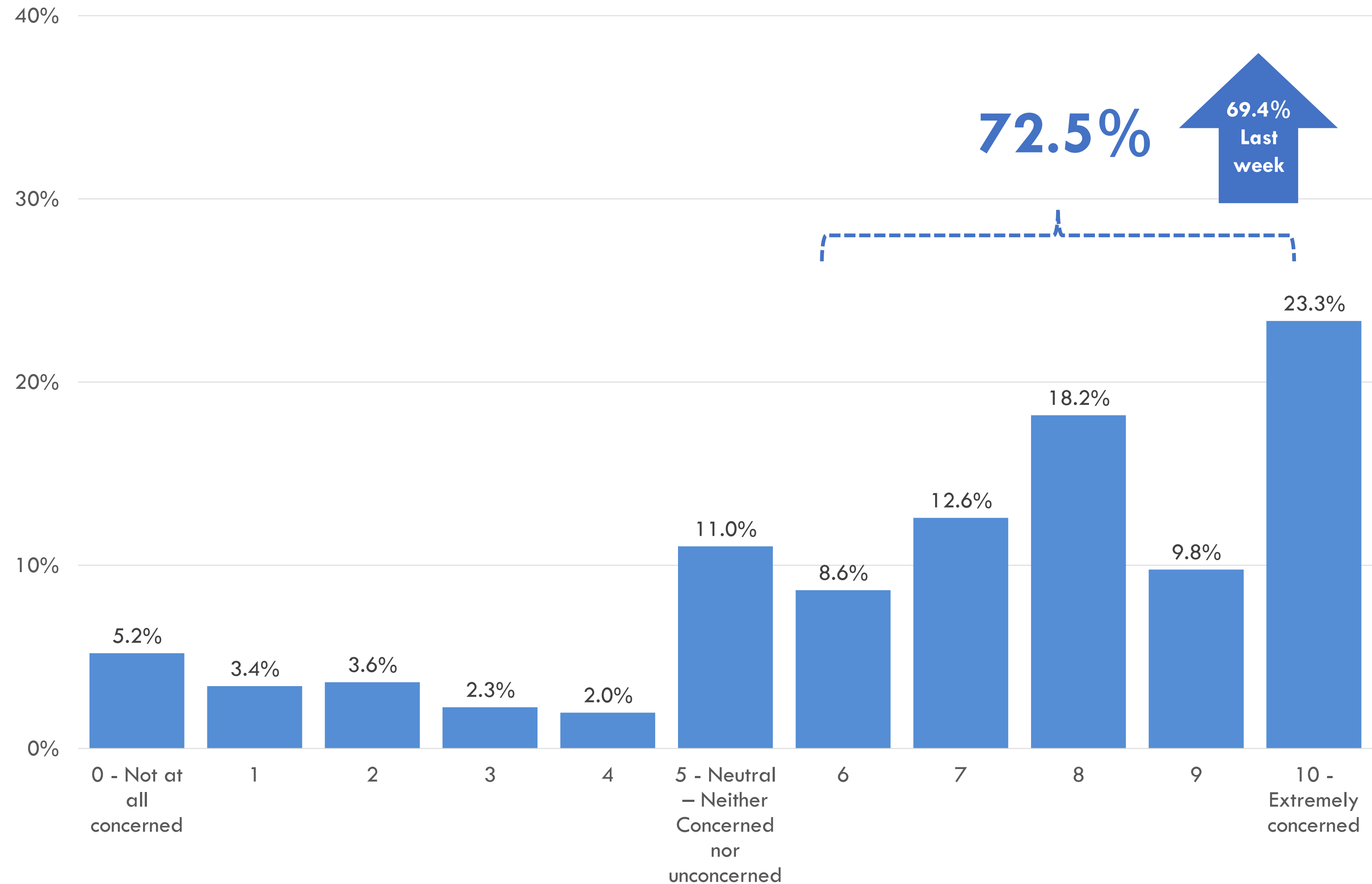
**CURRENT FEELINGS ABOUT  
THE CORONAVIRUS & TRAVEL**



# PERSONAL HEALTH CONCERNS

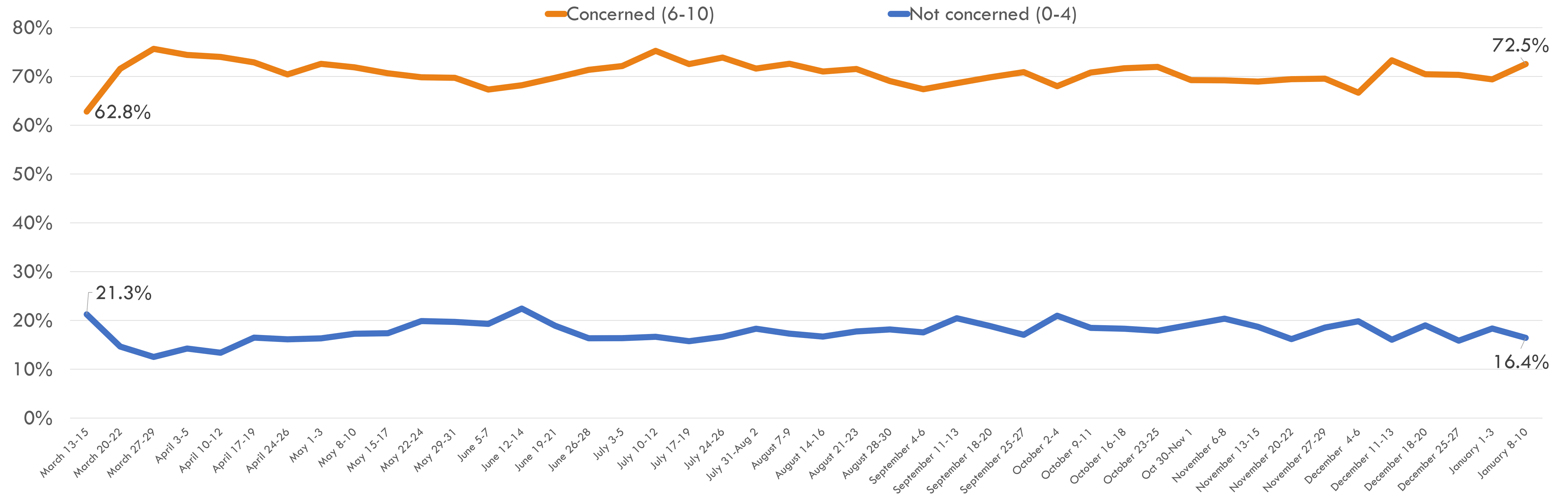
**Question:** Thinking about the current coronavirus situation, in general, **HOW CONCERNED ARE YOU PERSONALLY** about contracting the virus? (Please answer using the scale below)

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# PERSONAL HEALTH CONCERNS (WAVES 1-44)

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

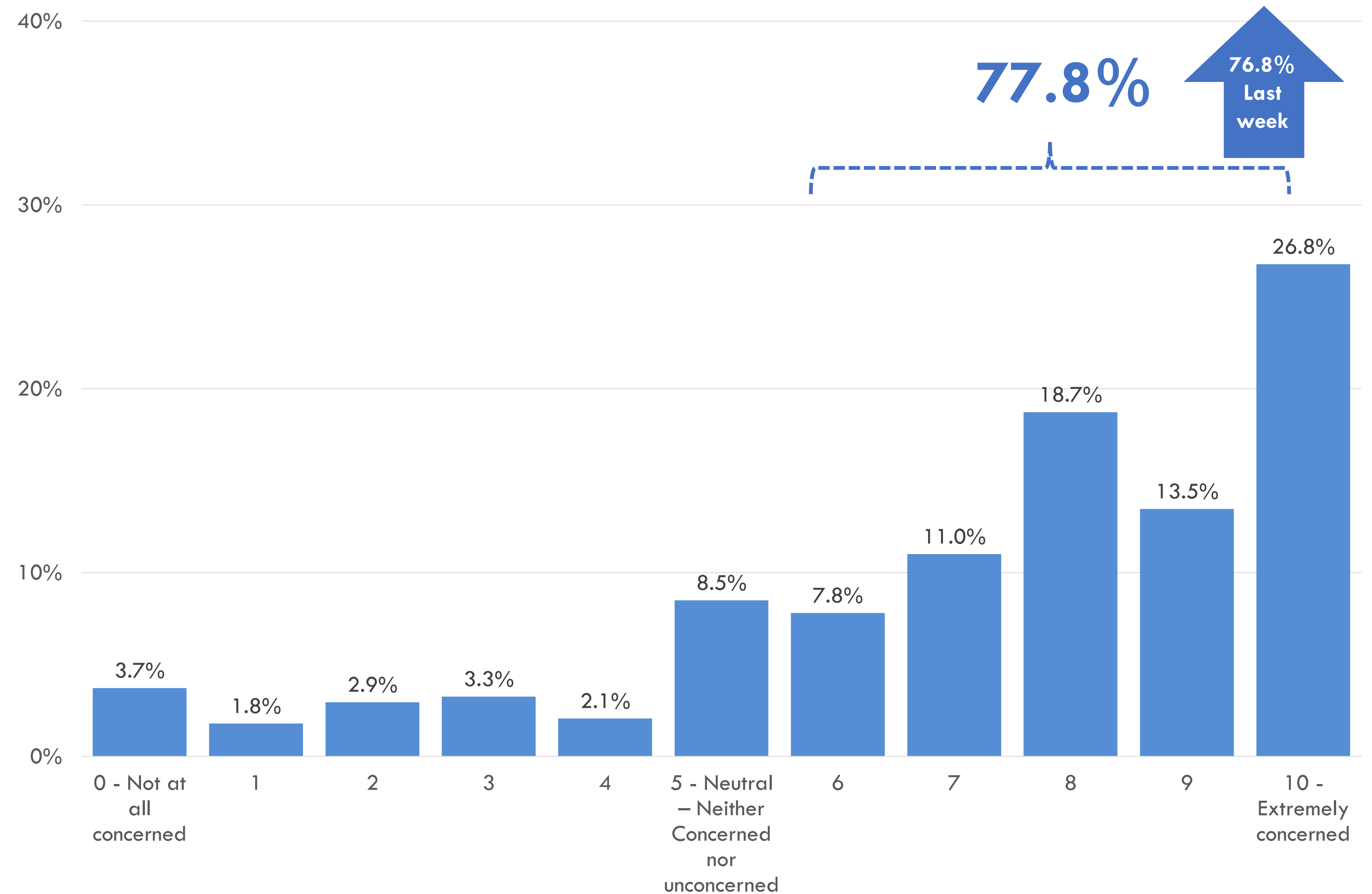


(Base: Waves 1-44. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

# HEALTH CONCERNS (FAMILY & FRIENDS)

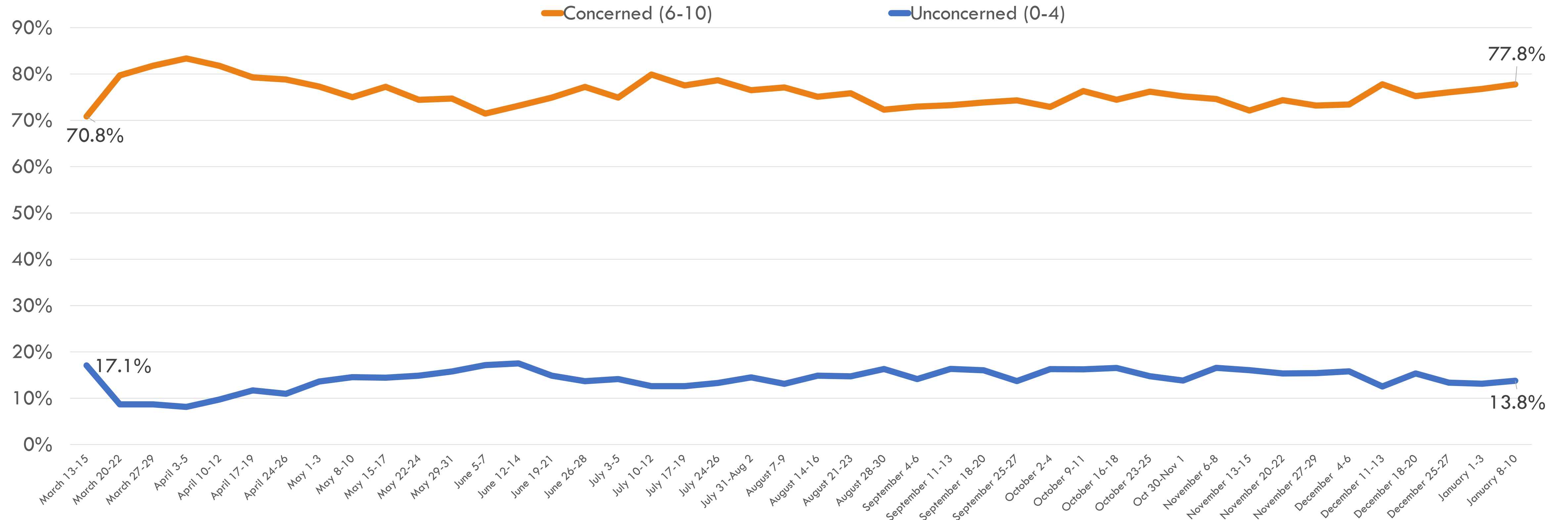
**Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# HEALTH CONCERNS (FAMILY & FRIENDS) (WAVES 1-44)

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

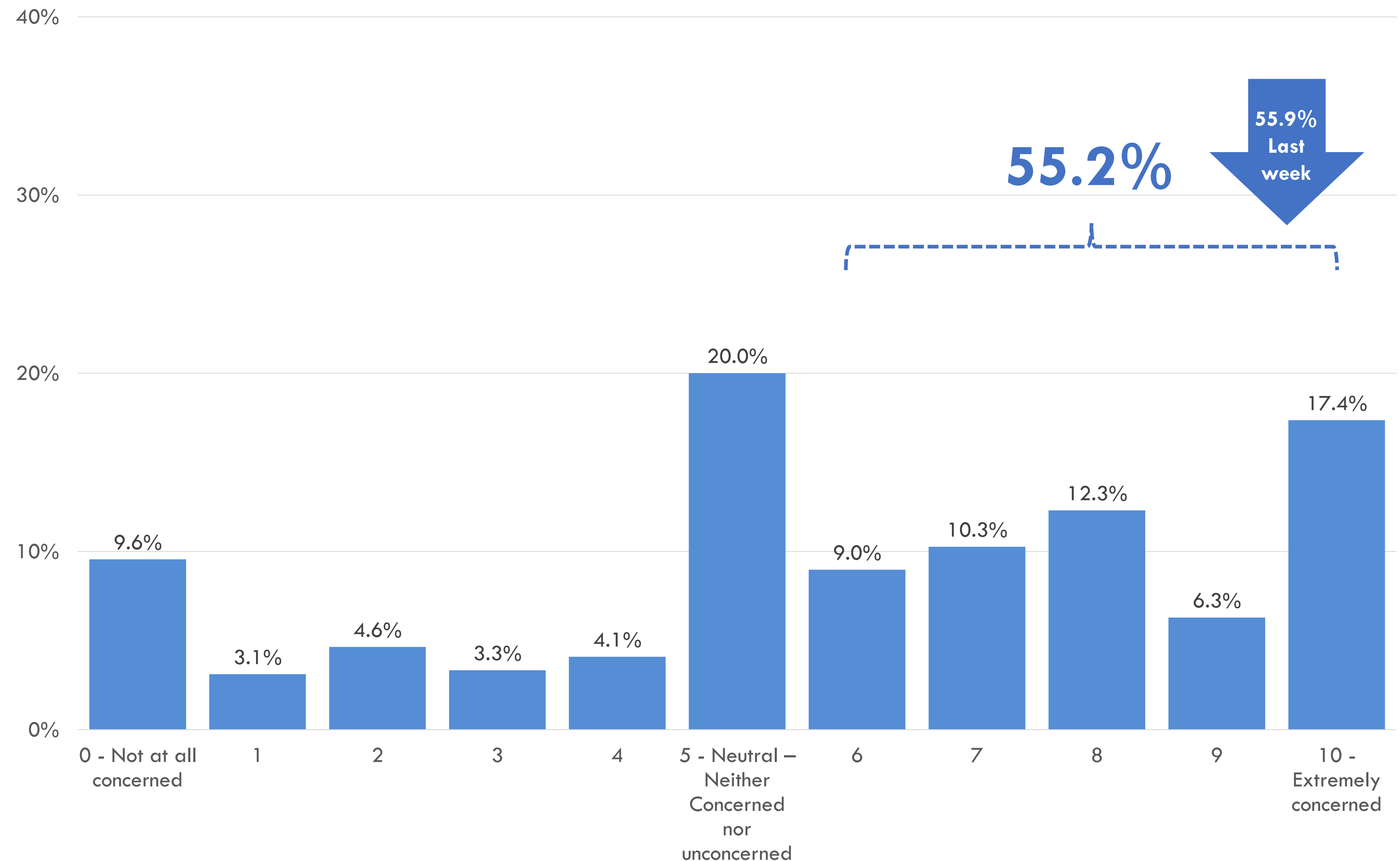


(Base: Waves 1-44. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

# CONCERNS ABOUT PERSONAL FINANCES

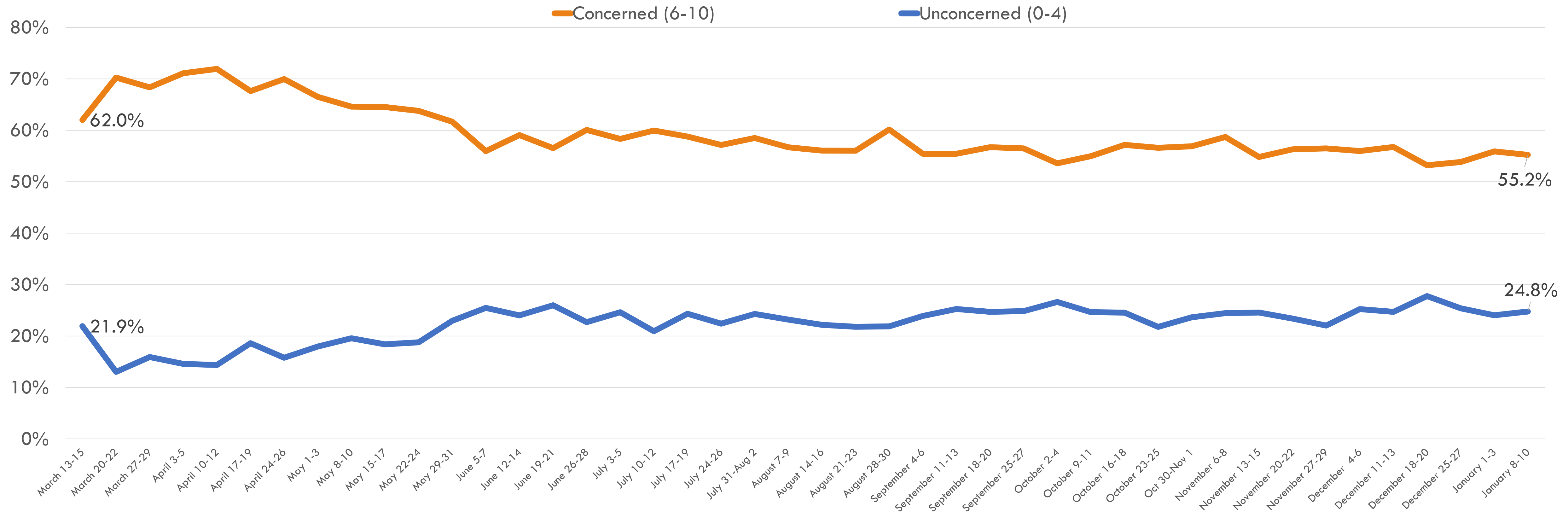
**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your **PERSONAL FINANCES?** (Please answer using the scale below)

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# CONCERNS ABOUT PERSONAL FINANCES (WAVES 1-44)

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

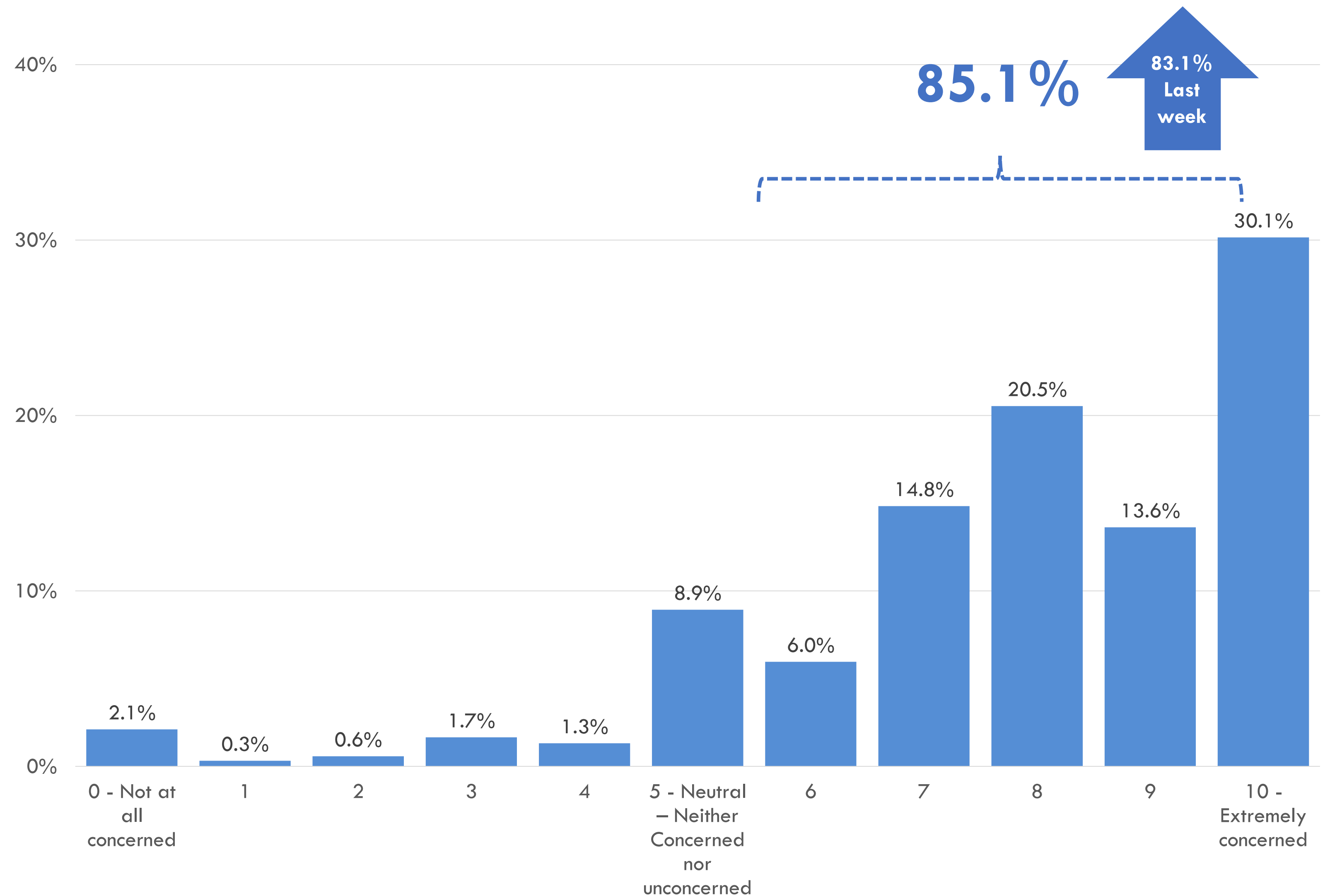


(Base: Waves 1-44. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

# CONCERNS ABOUT NATIONAL ECONOMY

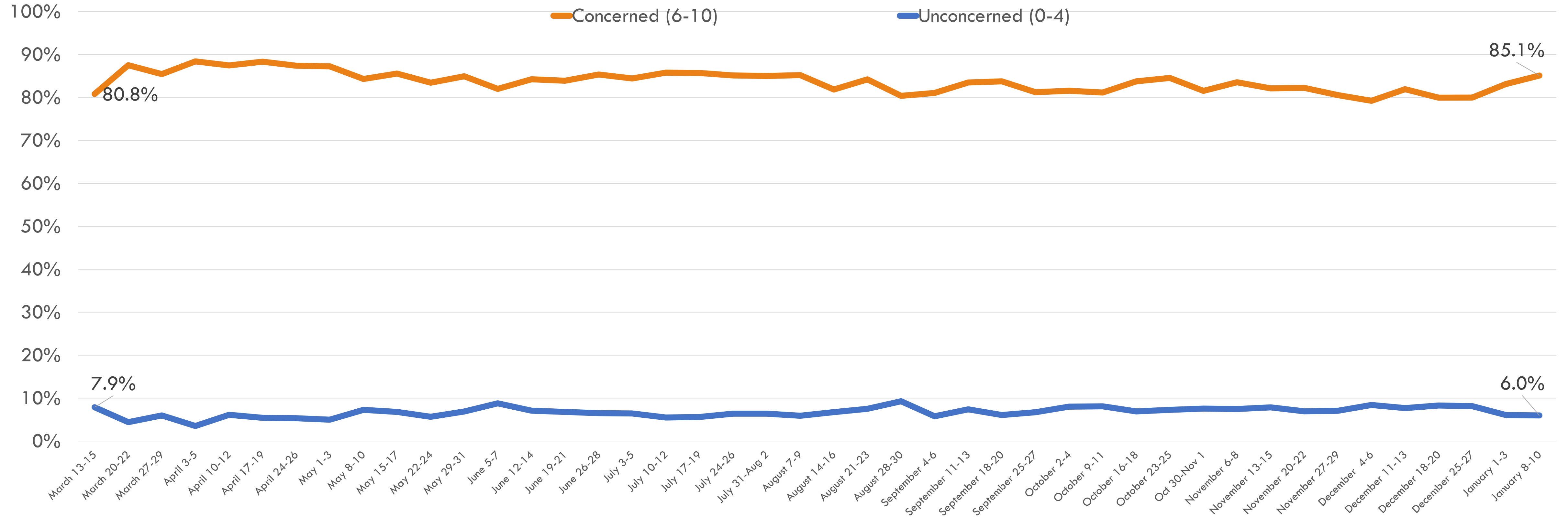
**Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY?

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# CONCERNS ABOUT NATIONAL ECONOMY (WAVES 1-44)

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



(Base: Waves 1-44. 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 and 1,225 completed surveys.)

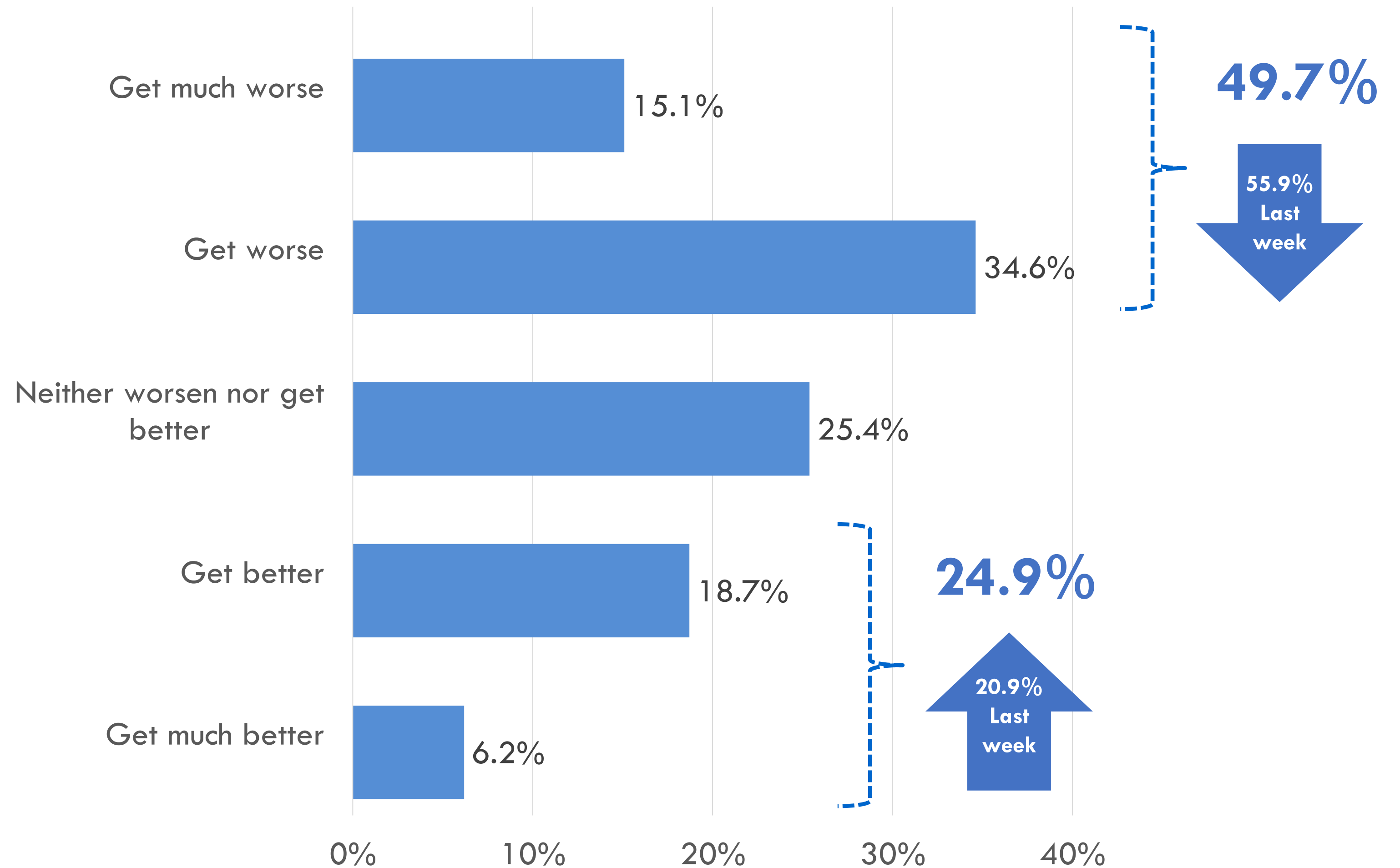


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

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

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

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)

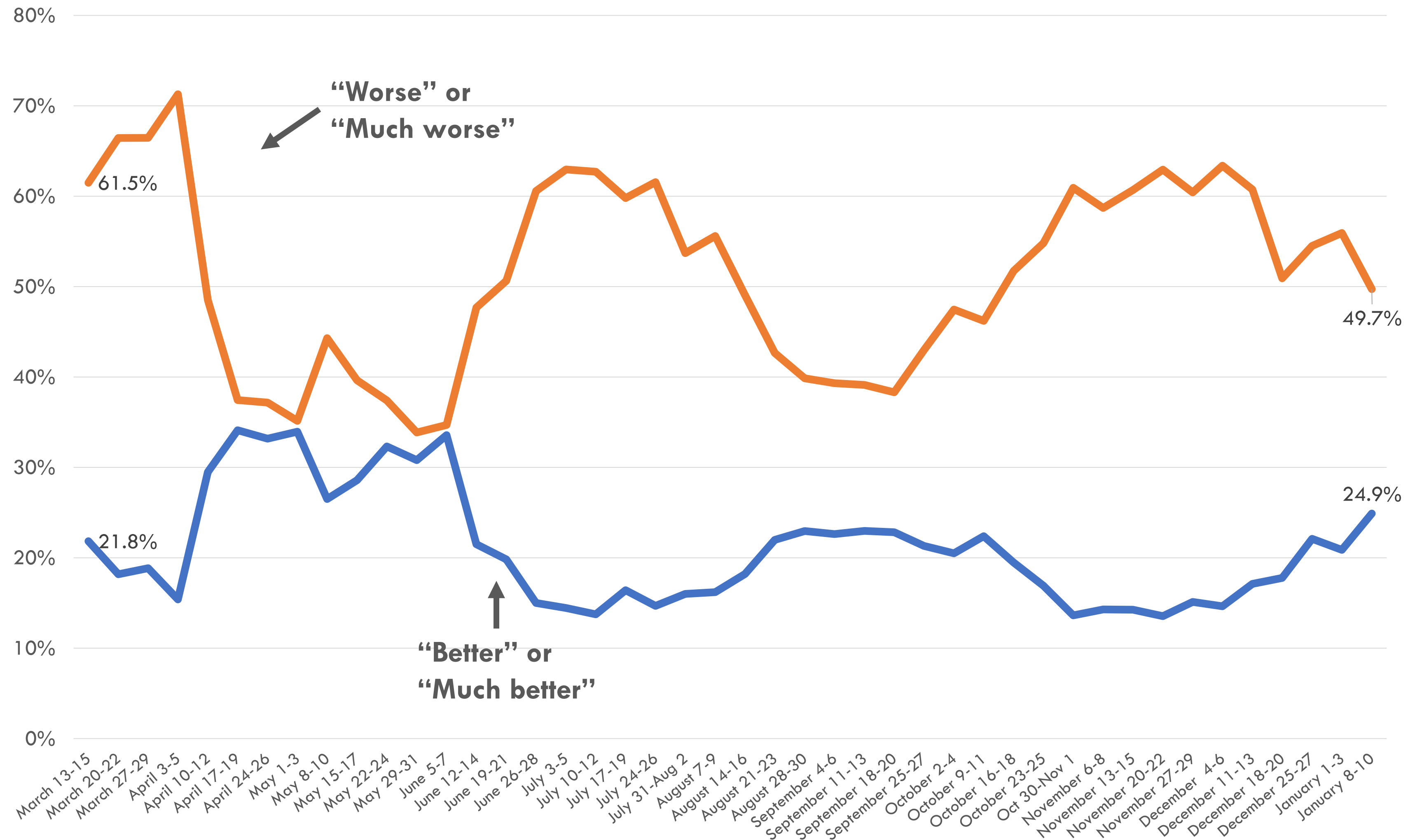


# EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-44)

**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 1-44. 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 and 1,225 completed surveys.)

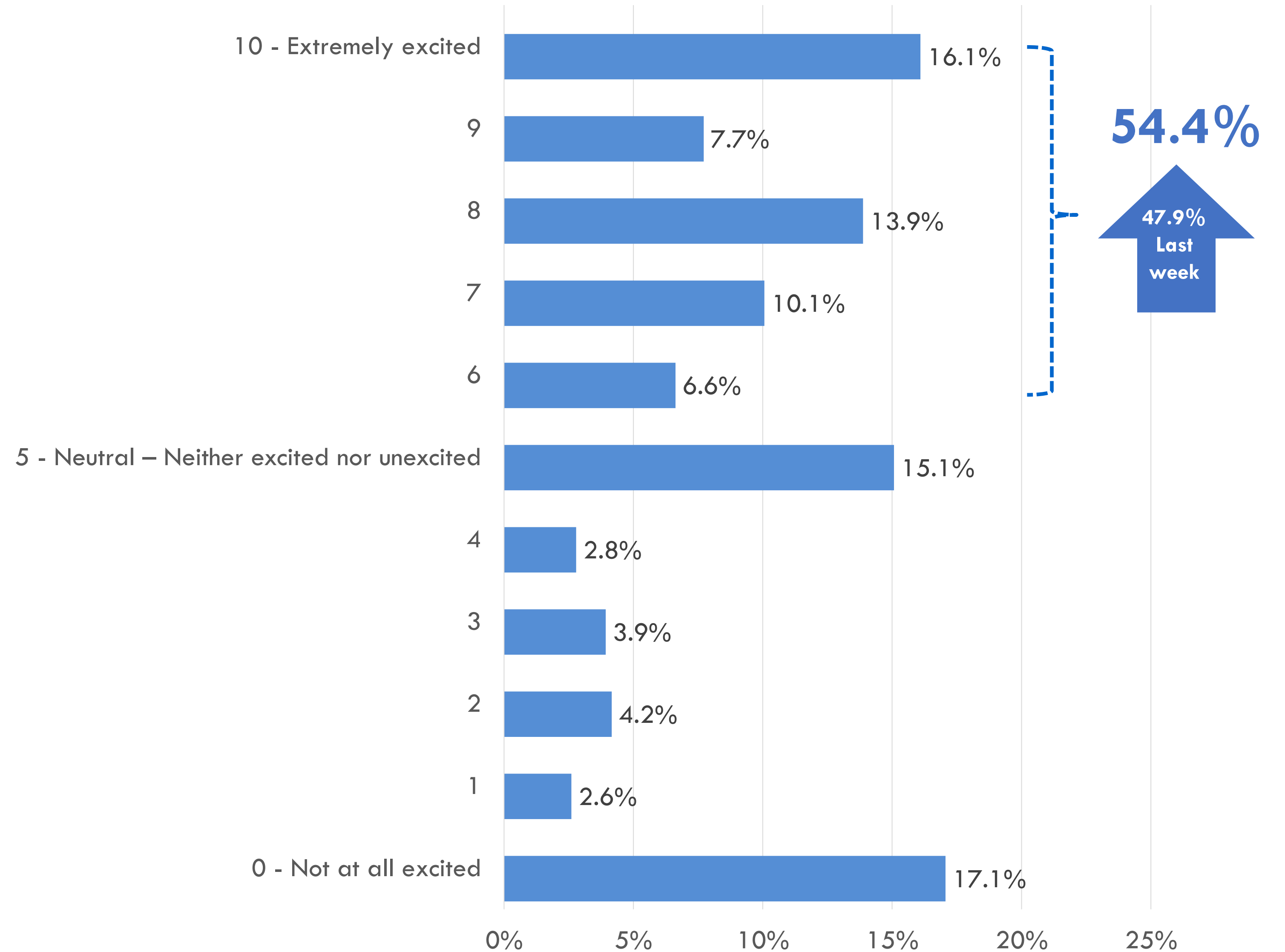


# EXCITEMENT TO TRAVEL NOW

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

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

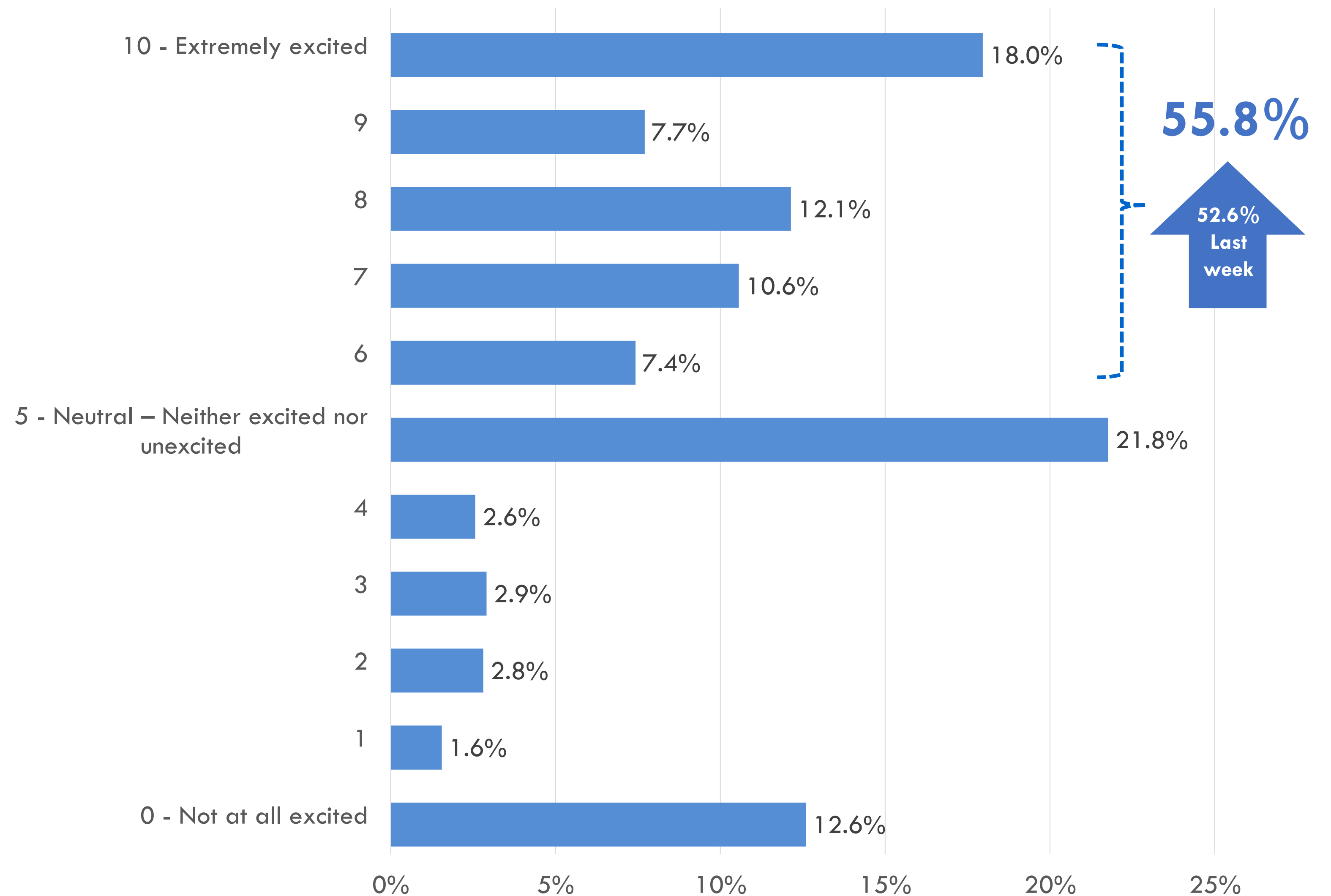
*(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*



# 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 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)

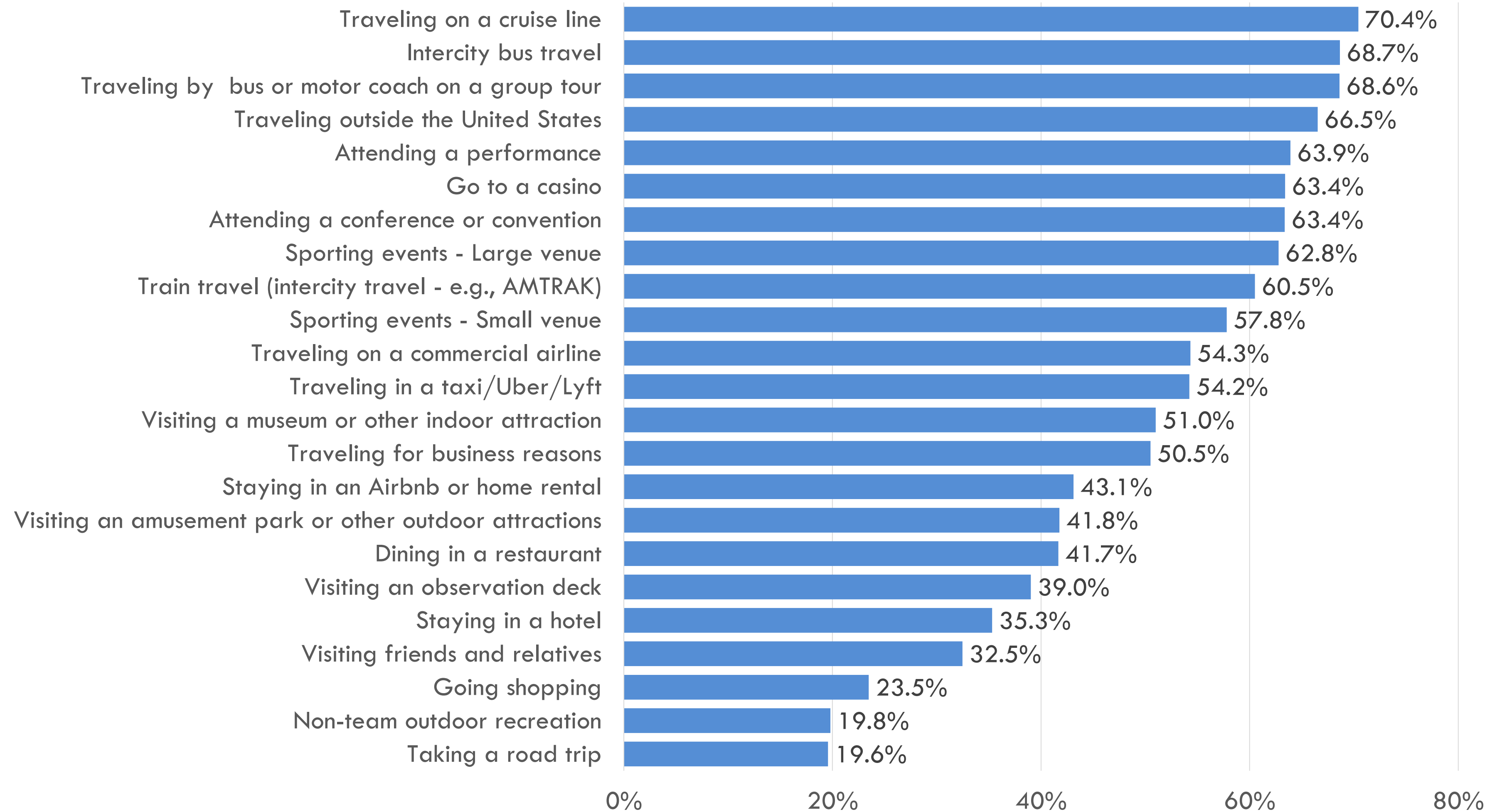


# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 44)

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

*(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*

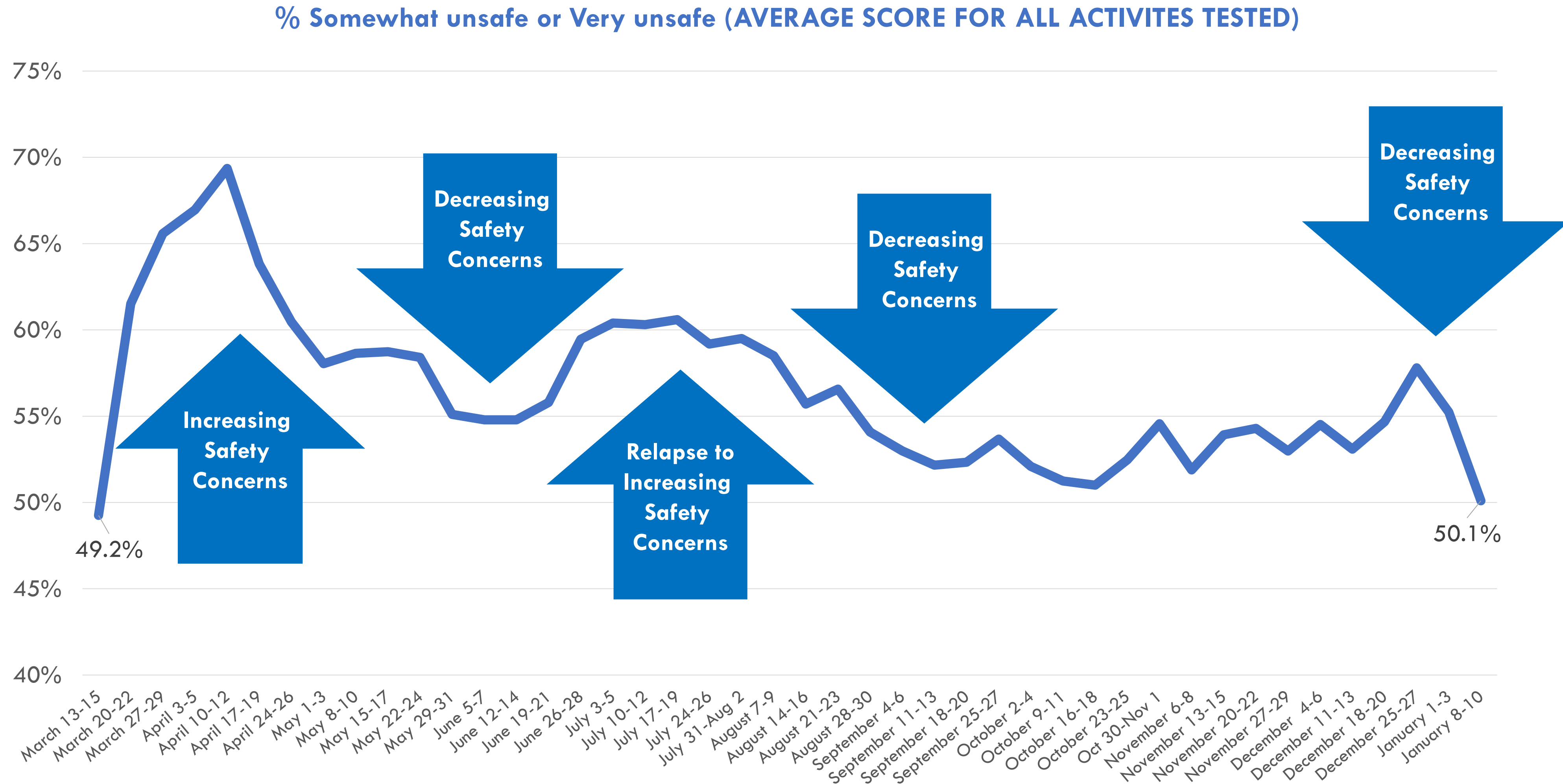
**Top 2-Box Score: Percent Selecting Each as “Somewhat Unsafe” or “Very Unsafe”**



# PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-44 COMPARISON)

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

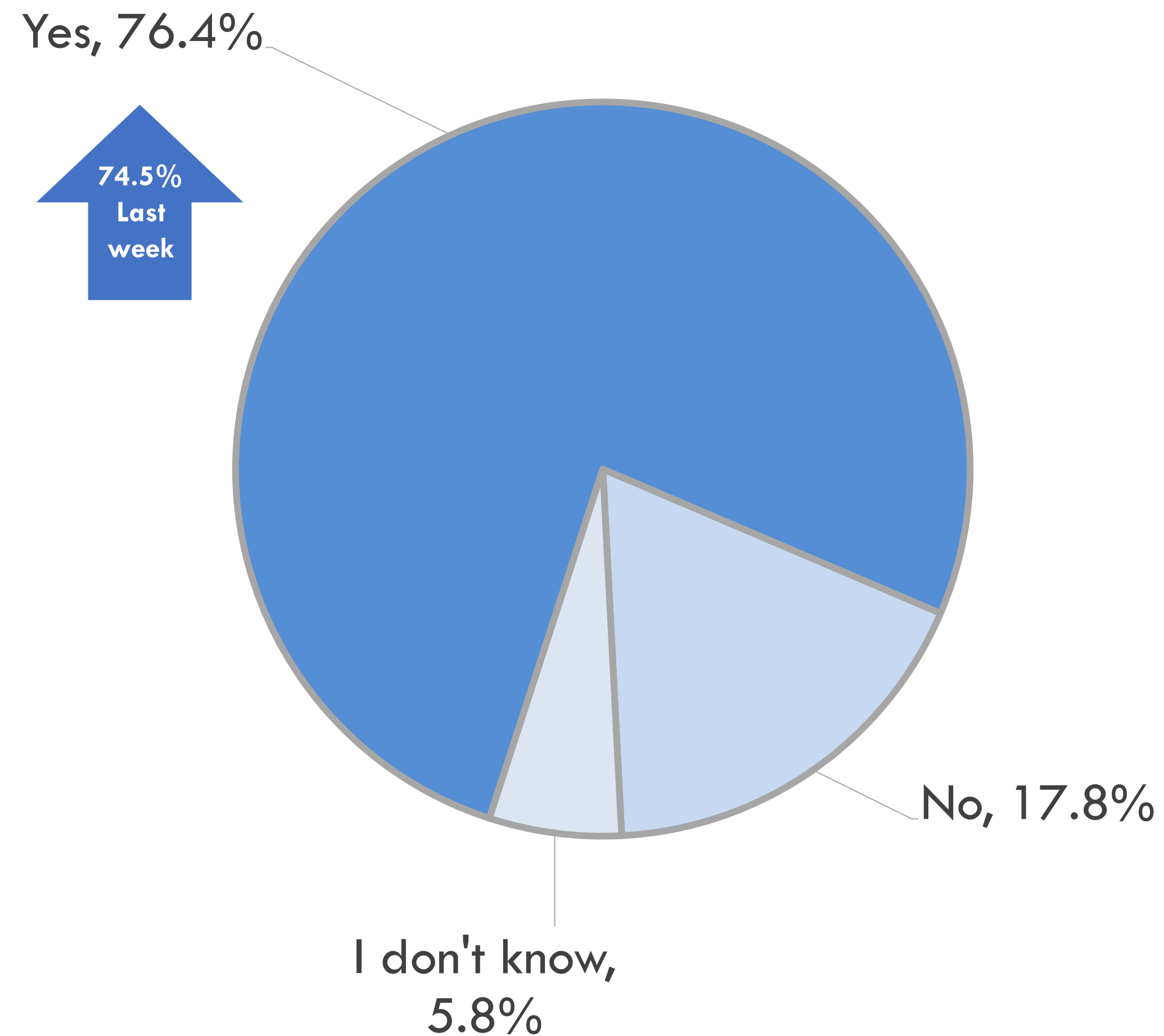
(Base: Waves 1-44. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)



# HAS PANDEMIC CHANGED NORMAL LEISURE TRAVEL PATTERNS

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

*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*

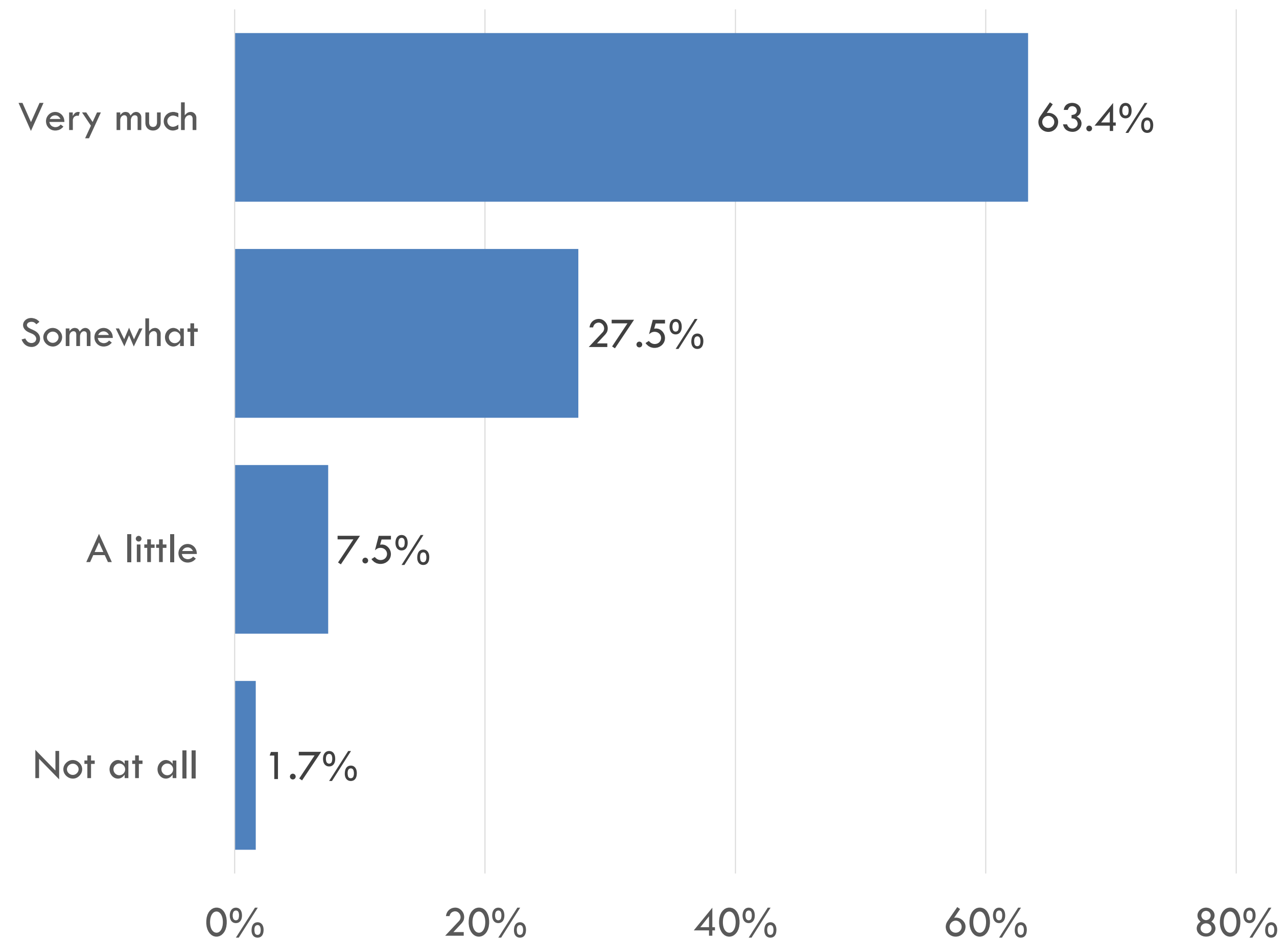


# AMERICANS WHOSE TRAVEL PATTERNS HAVE CHANGED DUE TO PANDEMIC: HOW MUCH DO YOU MISS TRAVELING?

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

I miss traveling \_\_\_\_\_.

(Base: Waves 44 data. Respondents who have changed their travel patterns in response to the pandemic, 943 completed surveys. Data collected January 8-10, 2021)



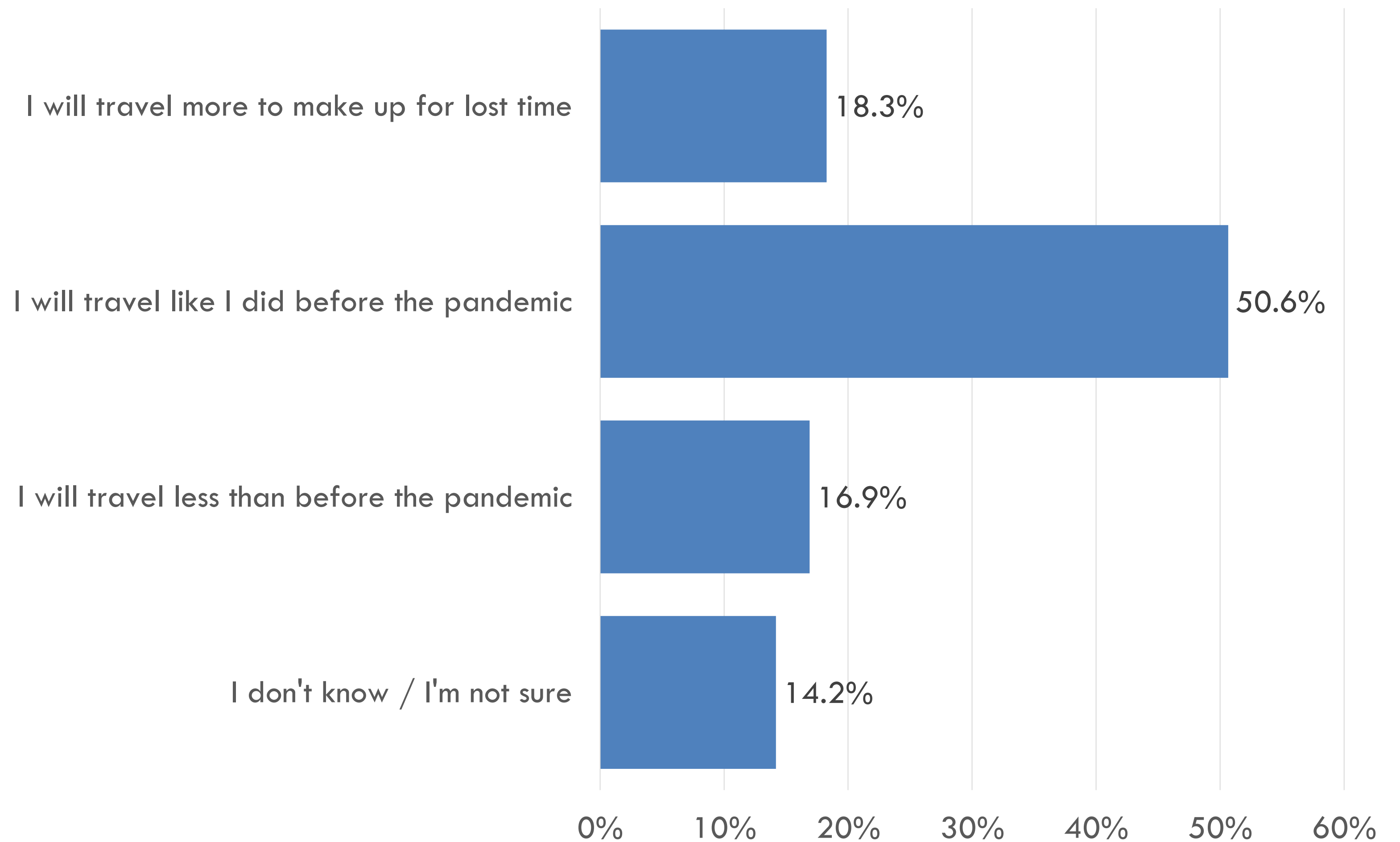


# AMERICANS WHOSE TRAVEL PATTERNS HAVE CHANGED DUE TO PANDEMIC & MISS TRAVEL: FUTURE TRAVEL EXPECTATIONS

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

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

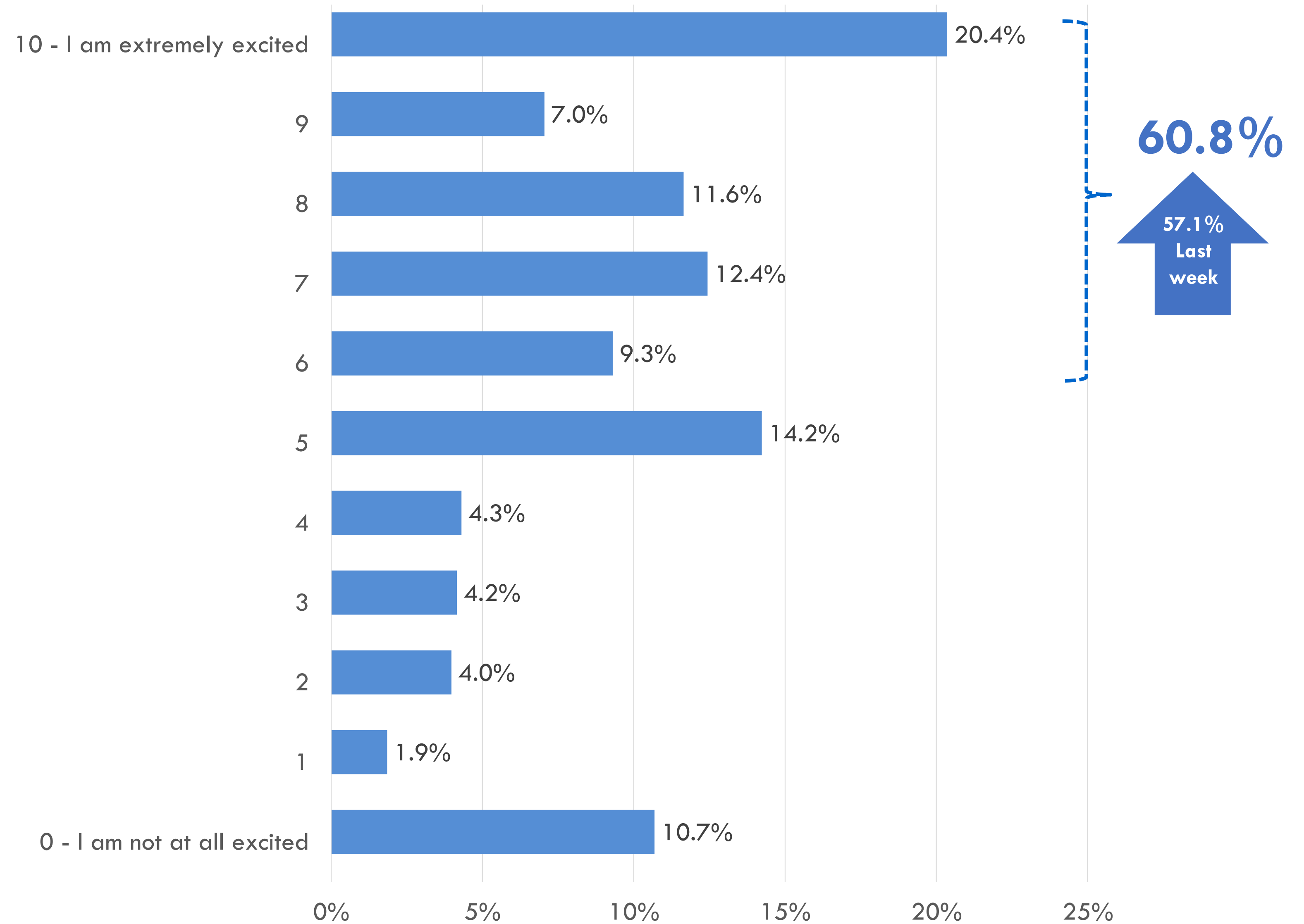
*(Base: Waves 44 data. Respondents who have changed their travel patterns in response to the pandemic and miss travel very much or somewhat, 930 completed surveys. Data collected January 8-10, 2021)*



# EXCITEMENT ABOUT TRAVEL IN 2021

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

(Base: Wave 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



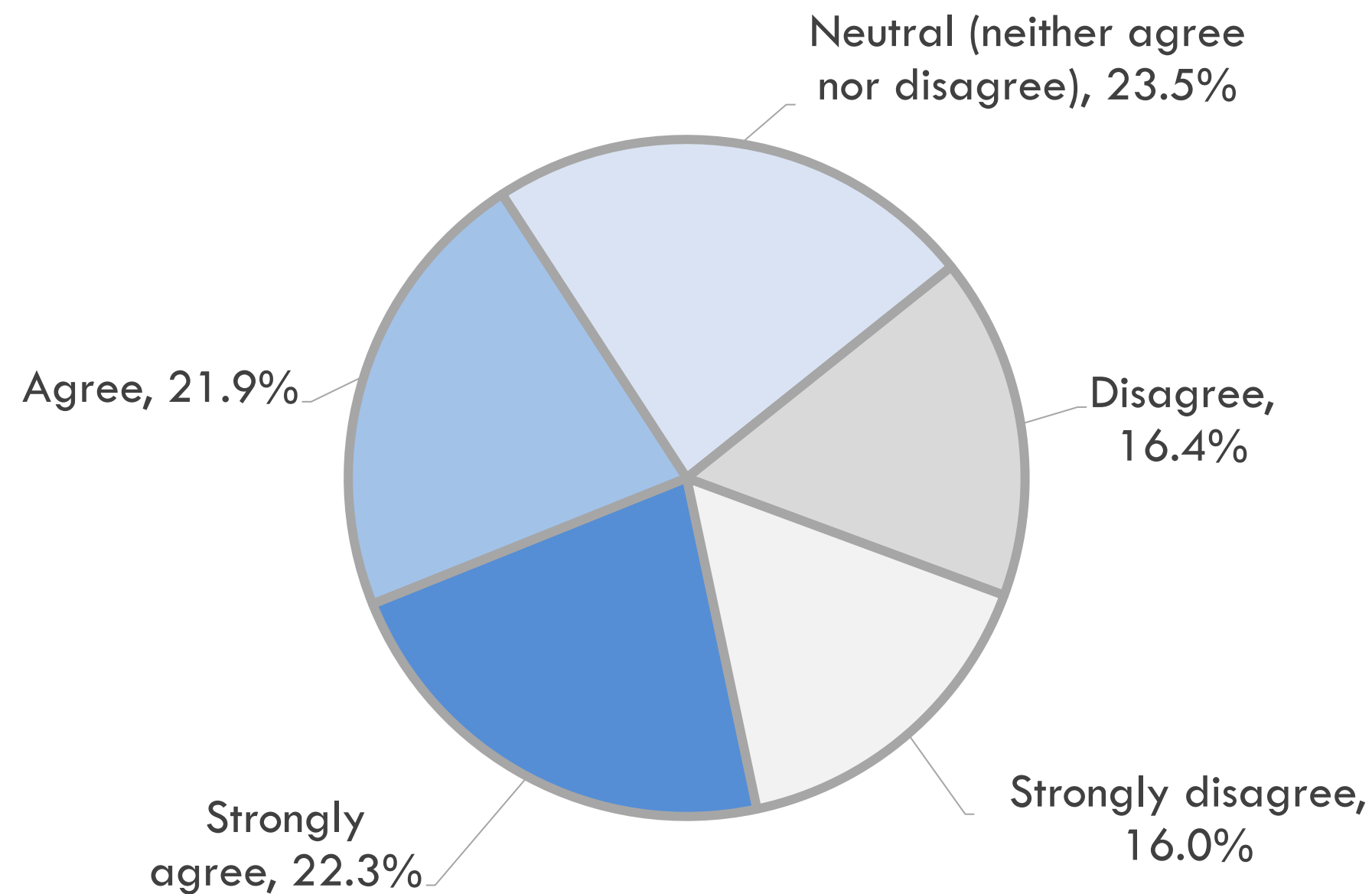
# FEELINGS ABOUT A COVID-19 VACCINE



# TRAVEL UNTIL GETTING THE VACCINE

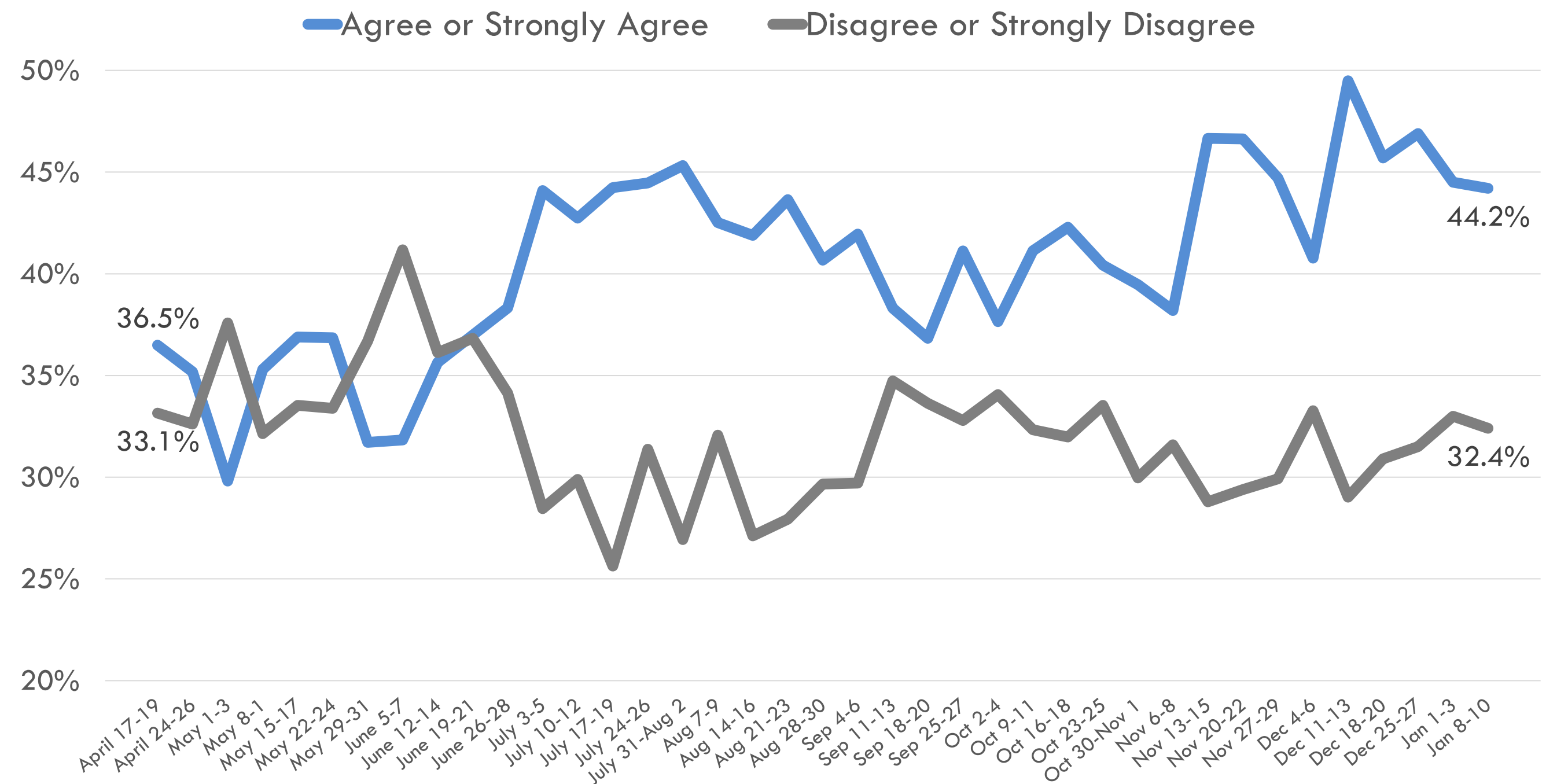
How much do you agree with the following statement?

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



(Base: Waves 6-44. 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 and 1,225 completed surveys.)

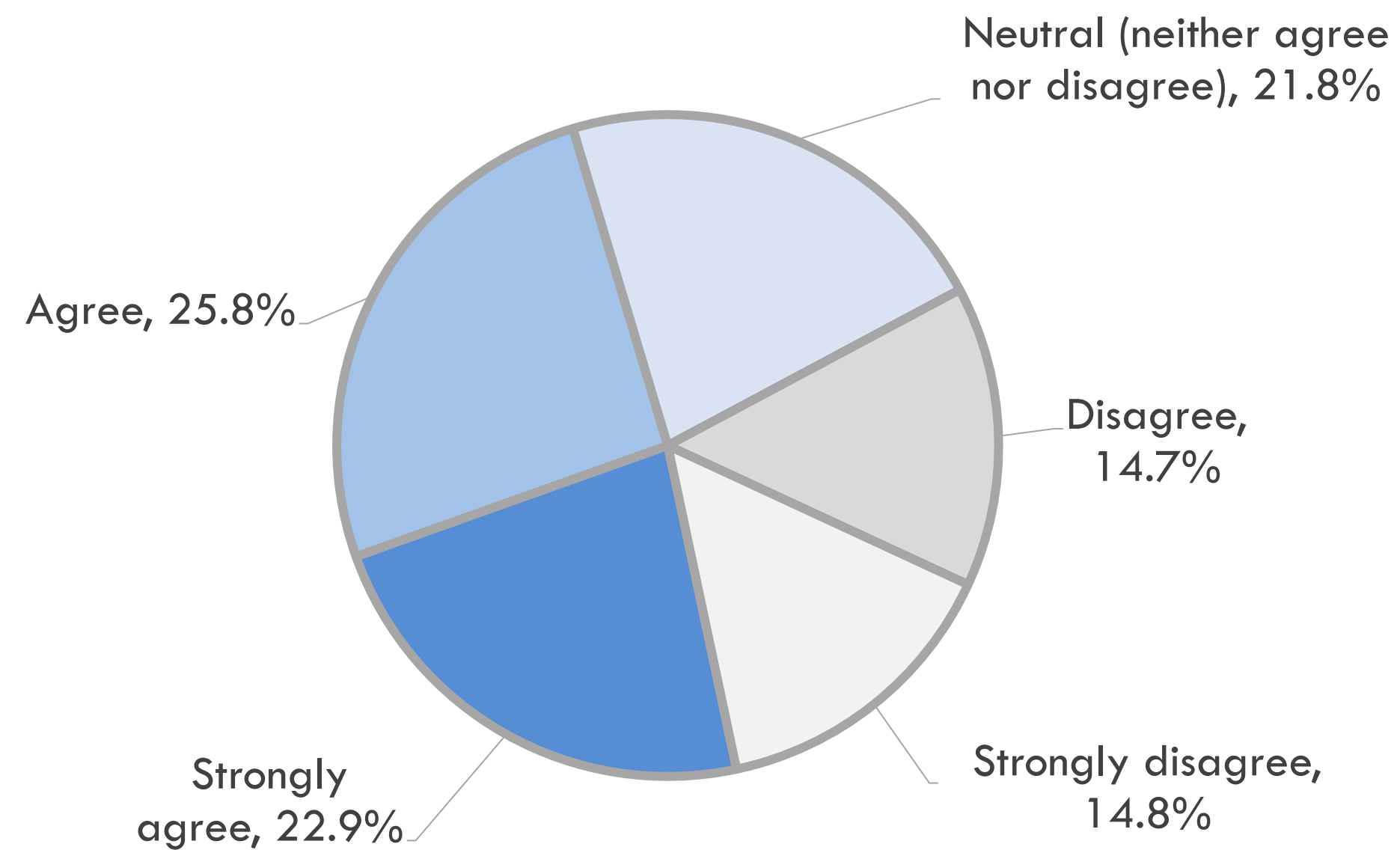
## Historical data



# TRAVEL UNTIL VACCINES ARE MADE WIDELY AVAILABLE

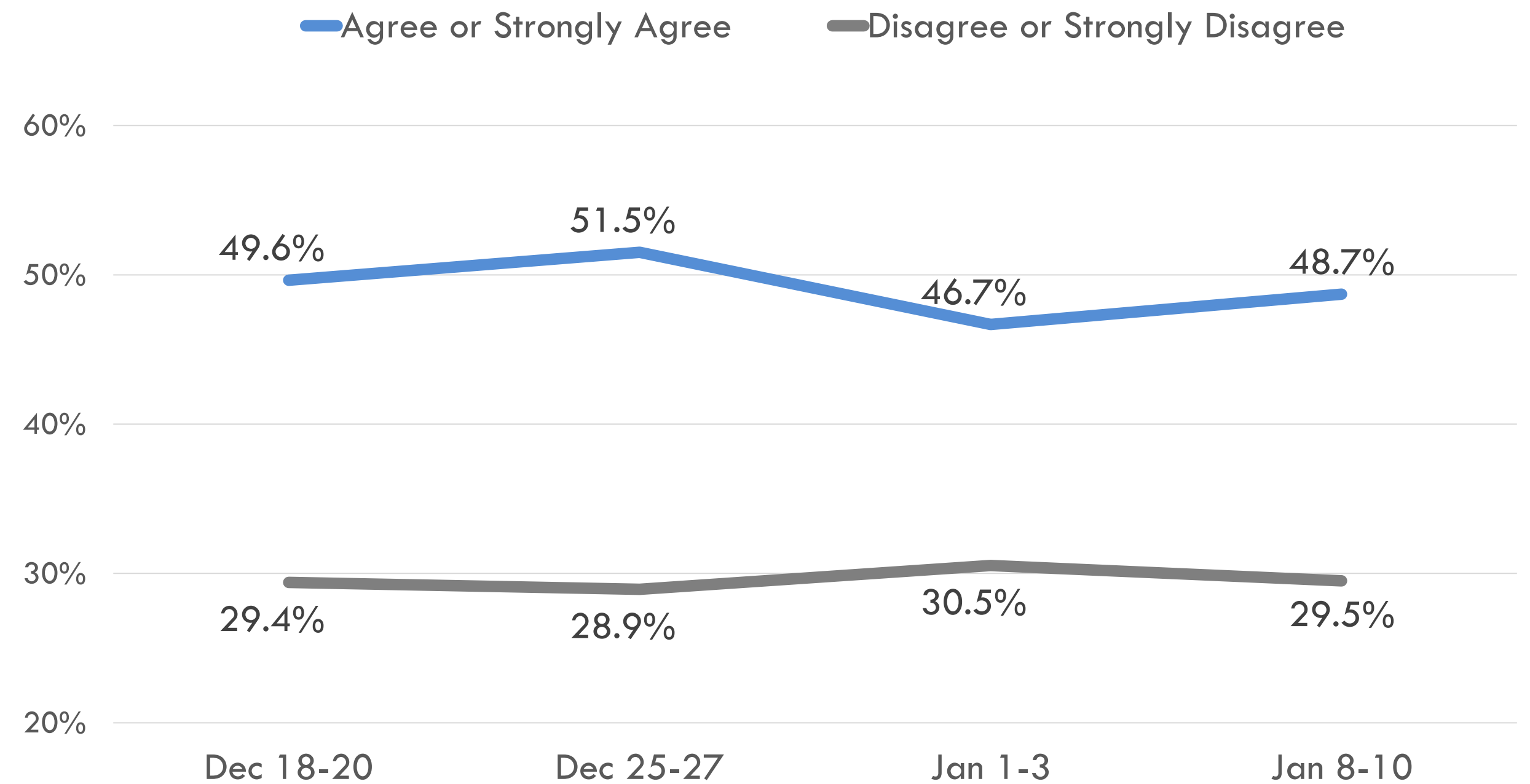
How much do you agree with the following statement?

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



(Base: Waves 41-44. All respondents, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

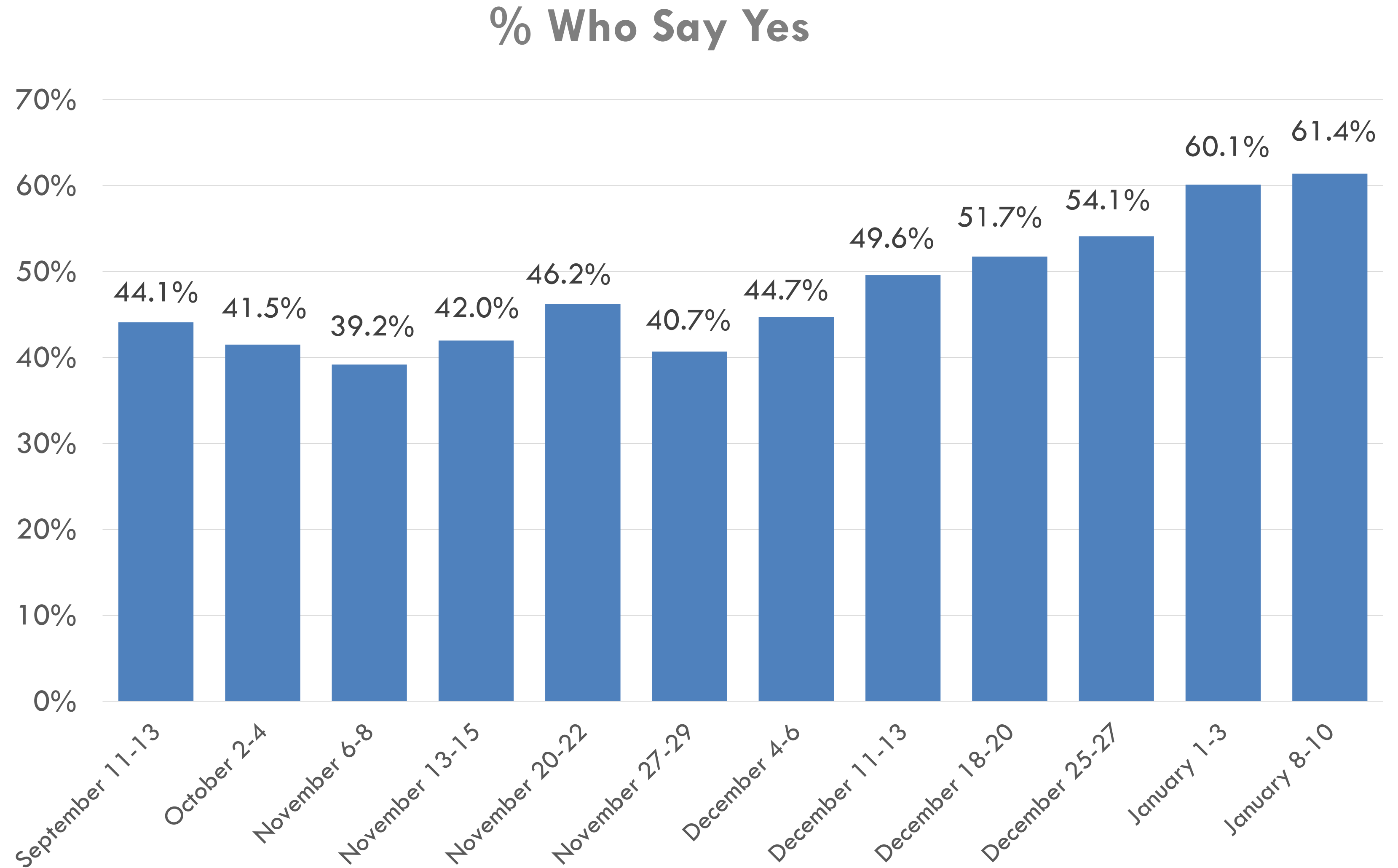
## Historical data



# EXPECTATIONS TO TAKE A COVID-19 VACCINE

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

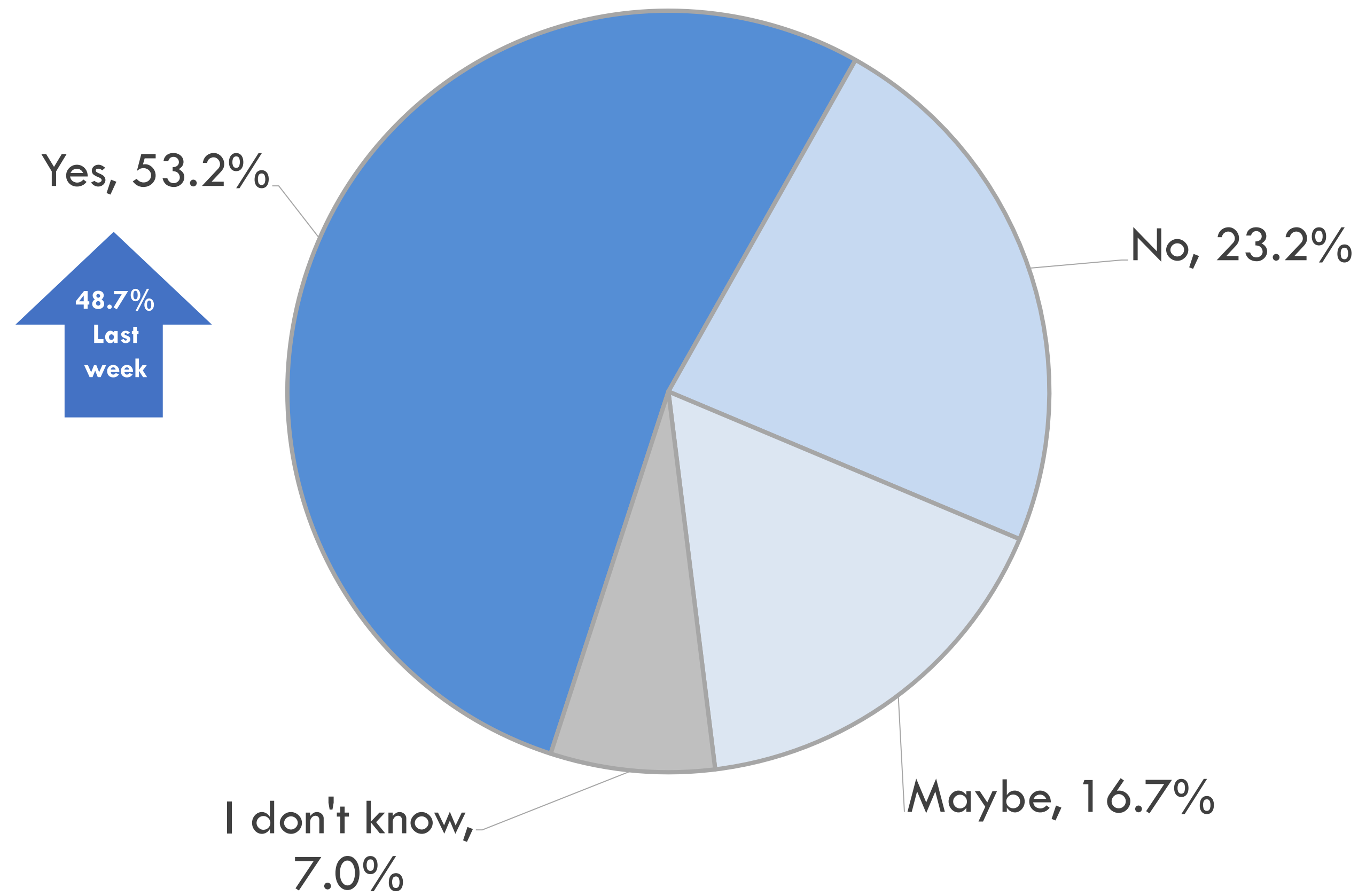
(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)



# VACCINES FOR CHILDREN

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

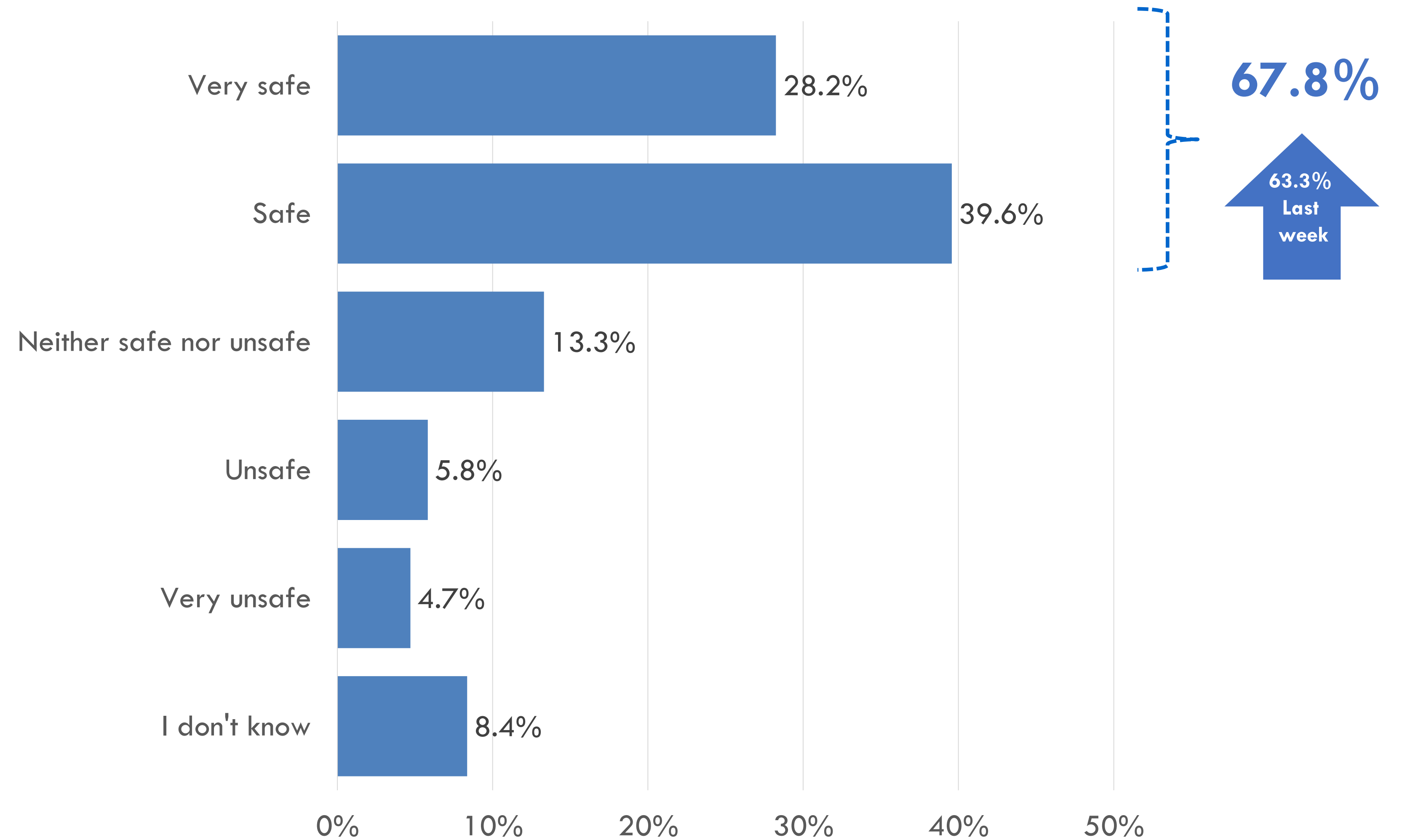
(Base: Wave 44 data. Respondents with school-aged children, 435 completed surveys. Data collected Jan 8-10, 2021)



# EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)



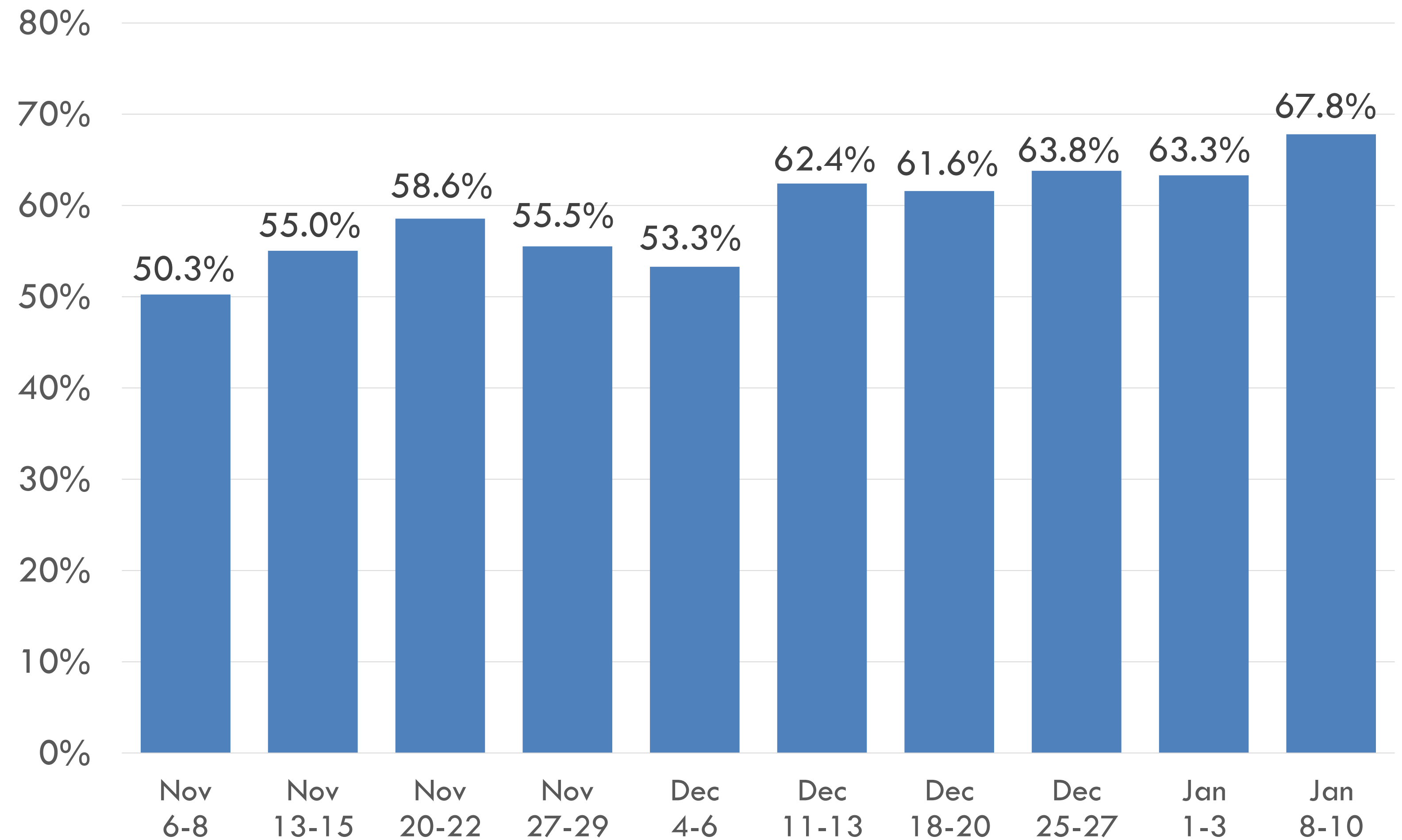


# EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)

Historical data (% Safe or Very safe)

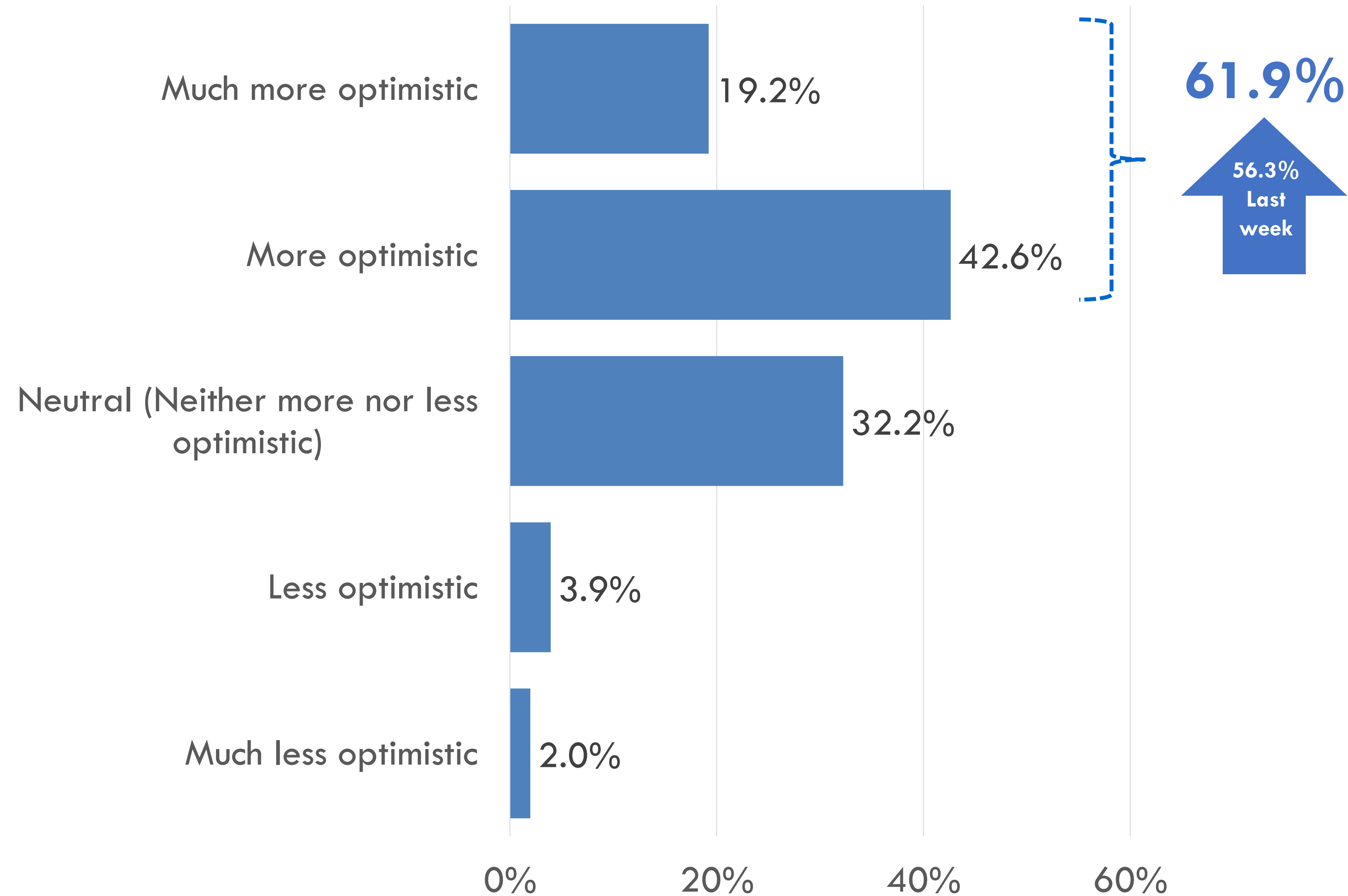


# VACCINES AND OPTIMISM FOR A RETURN TO NORMAL

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

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

*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)*

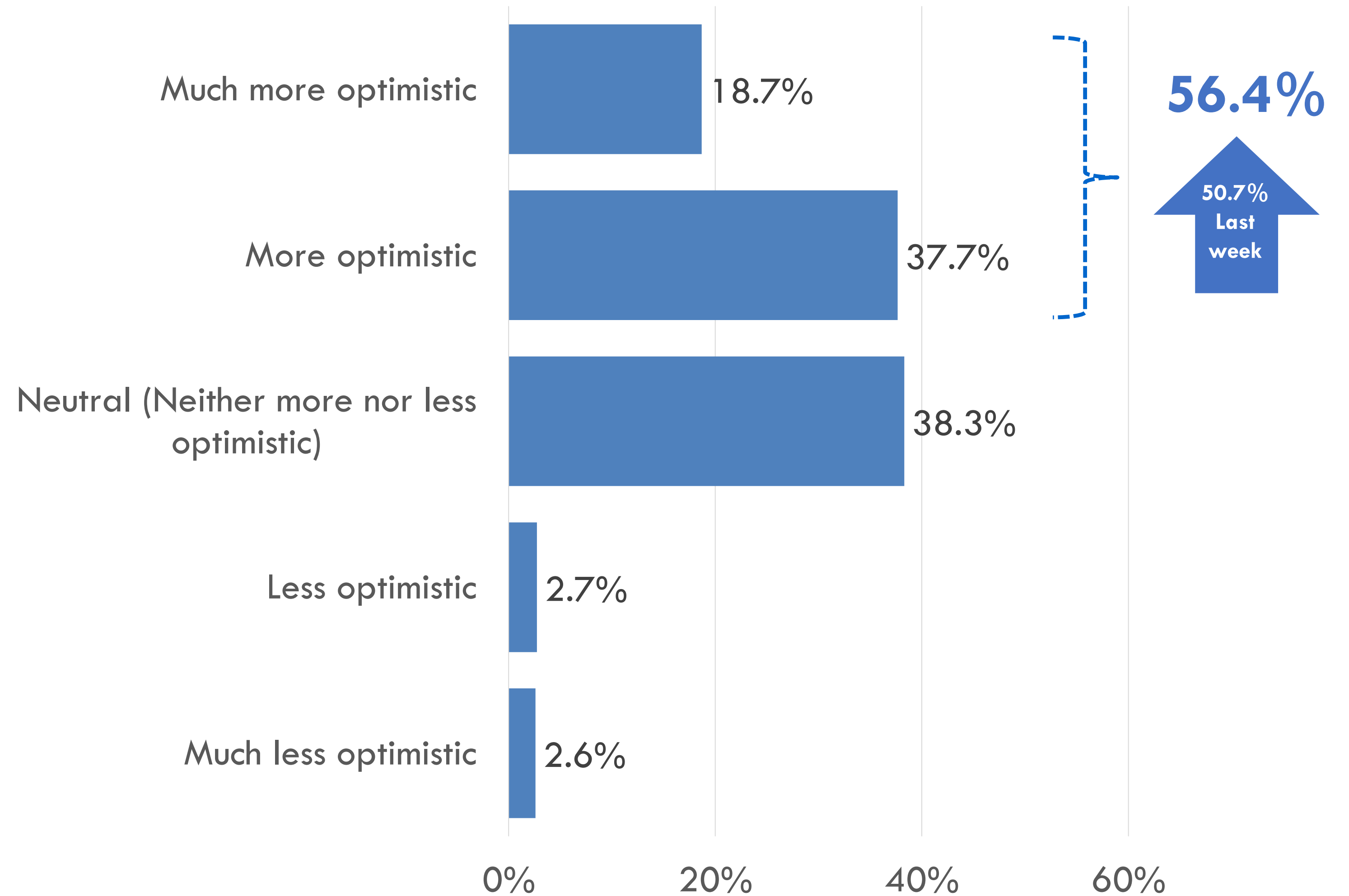


# VACCINES AND OPTIMISM FOR SAFE TRAVEL

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

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

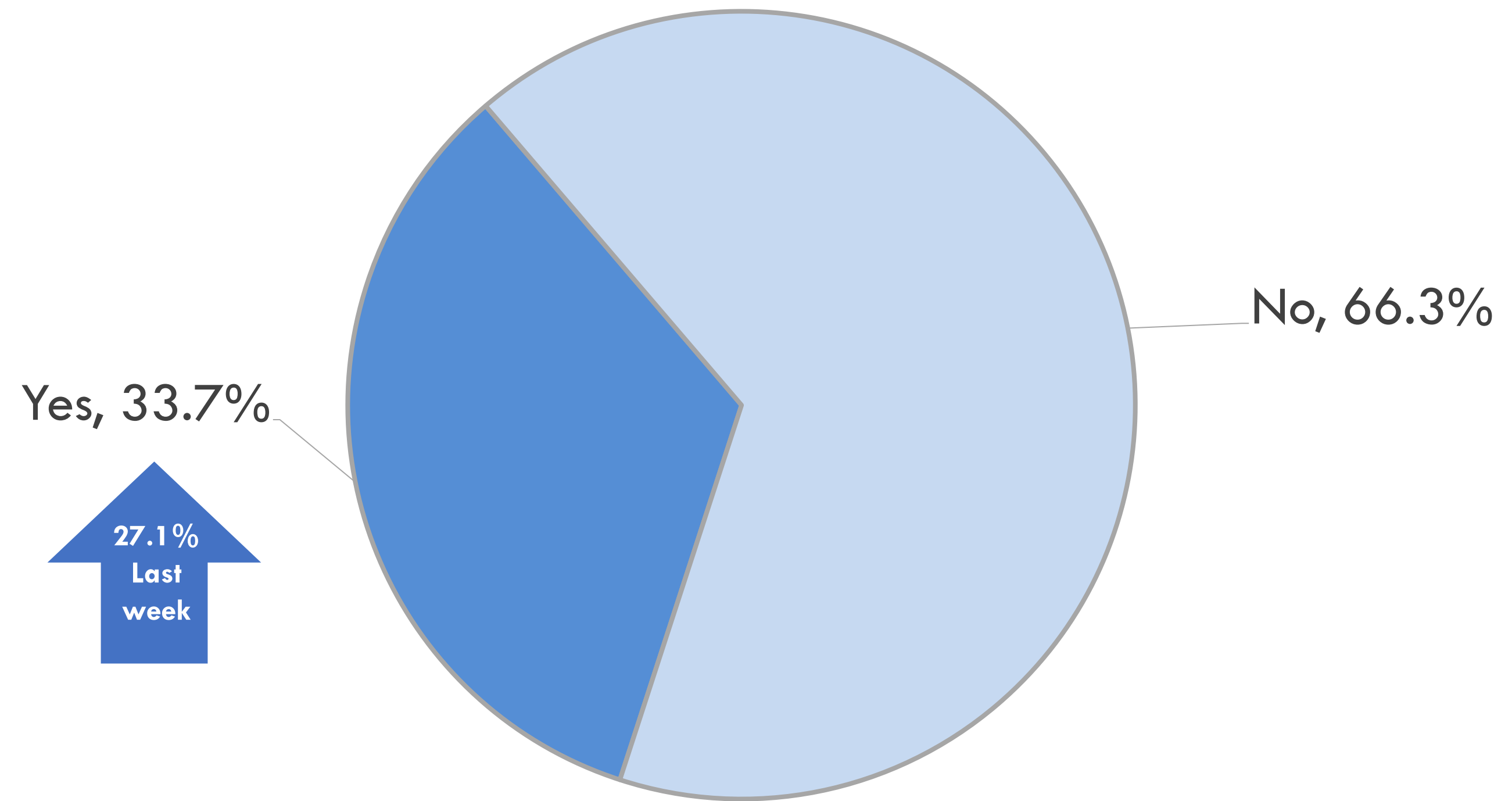
*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)*



# 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)

*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected Jan 8-10, 2021)*

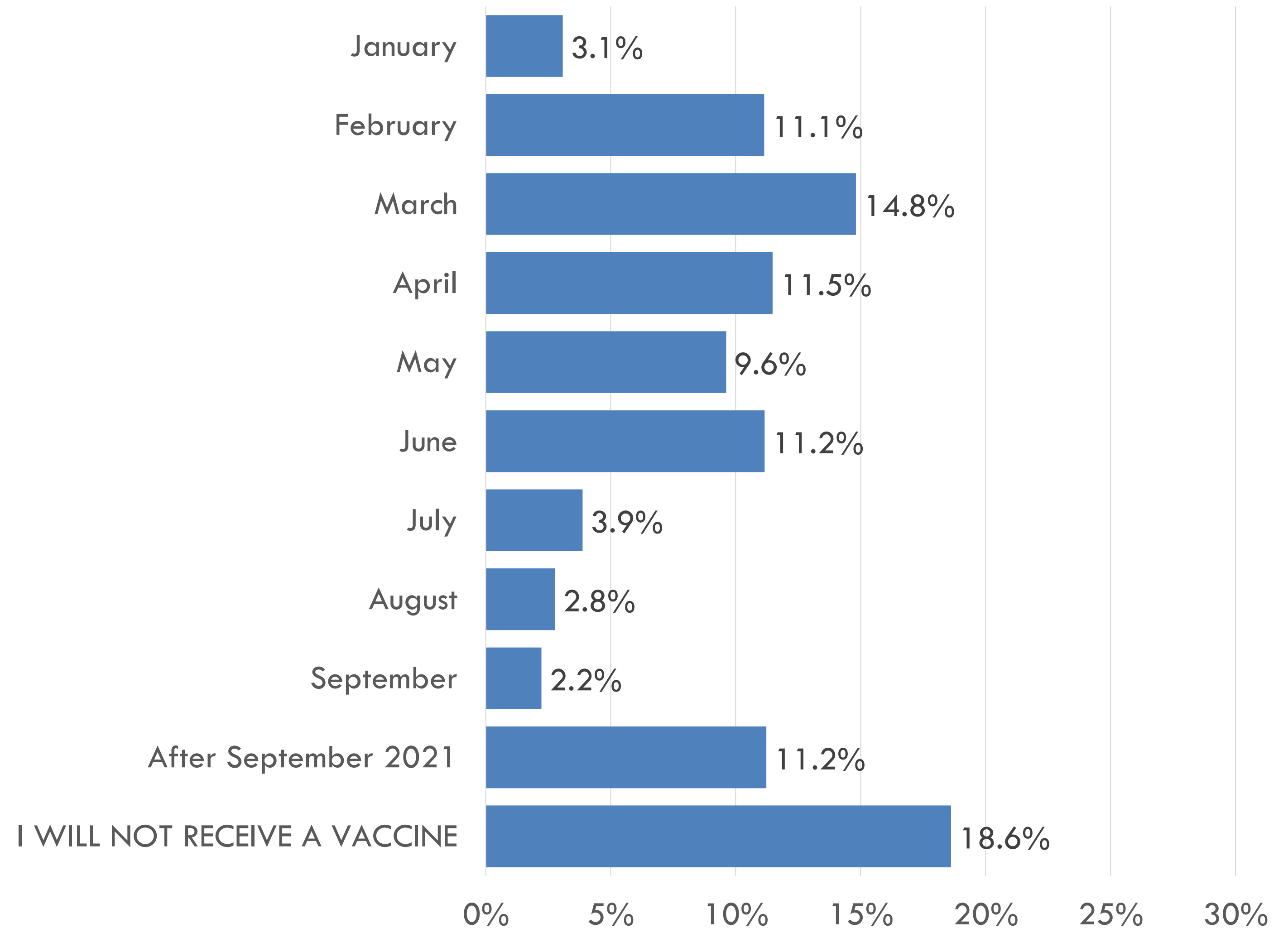


# EXPECTED MONTH OF VACCINATION

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

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

(Base: Waves 44 data. Respondents who have not yet been vaccinated, 1,099 completed surveys. Data collected January 8-10, 2021)



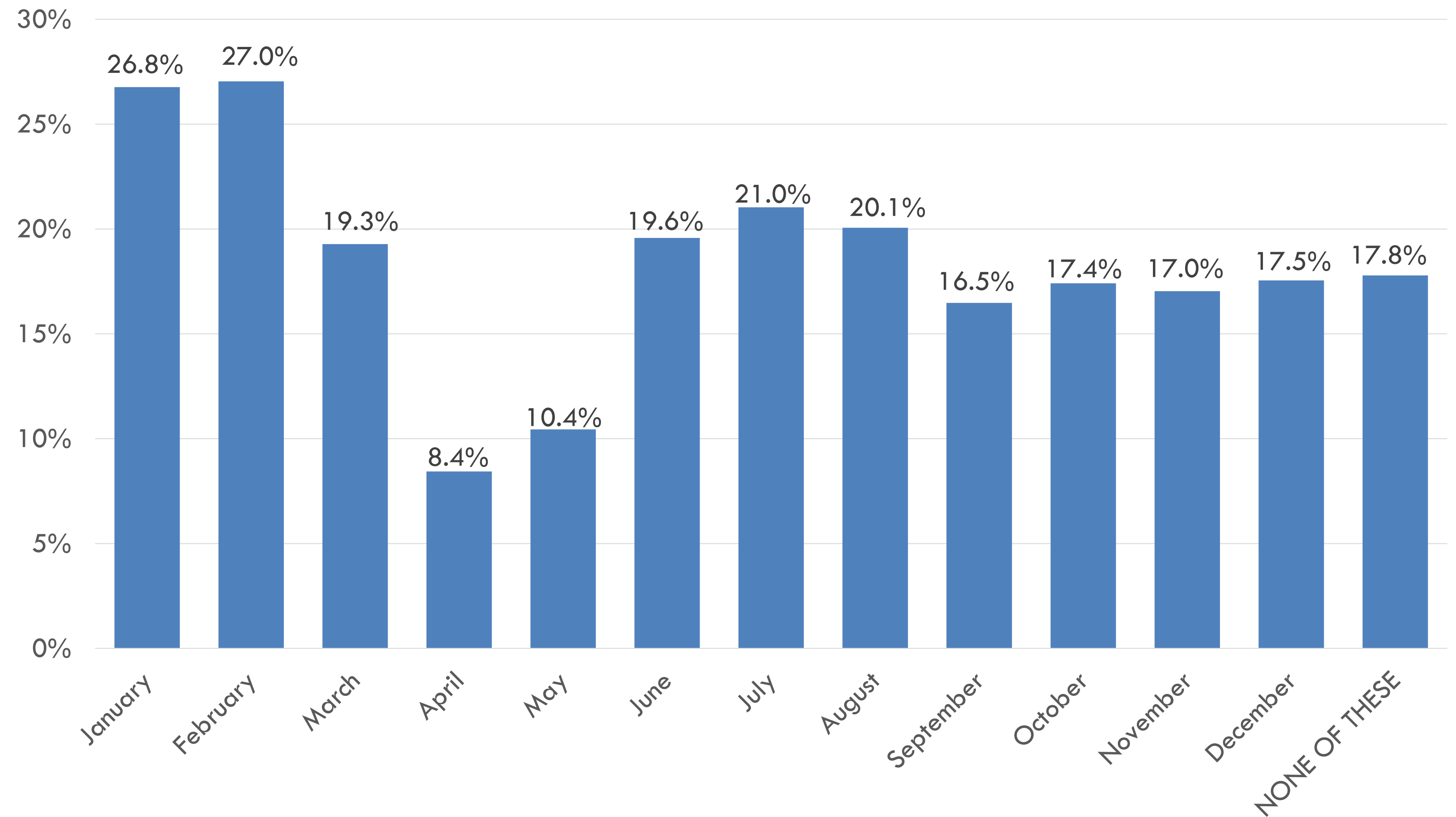


**FUTURE TRAVEL**

# MONTHS TRIPS WERE TAKEN IN 2020

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

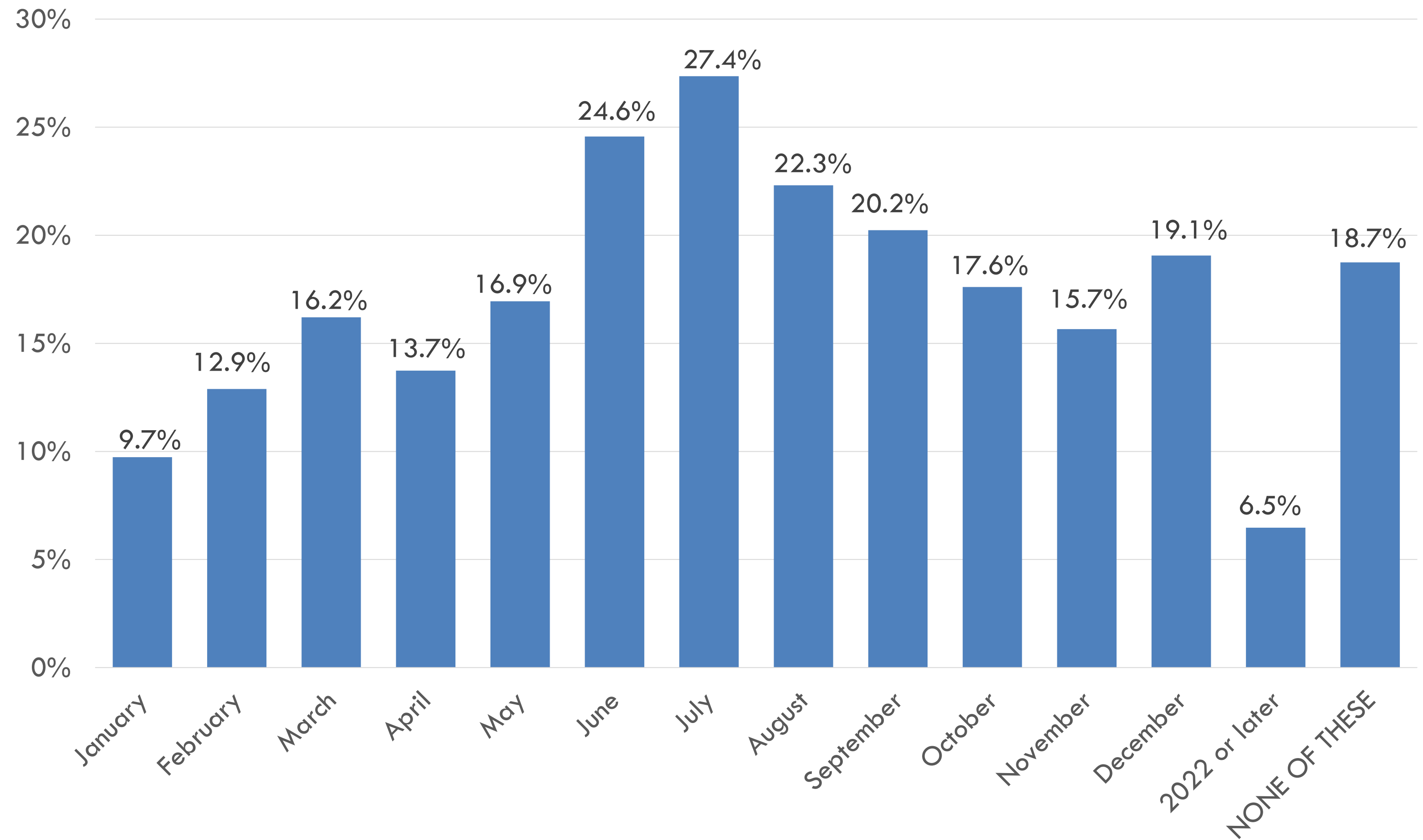
(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# MONTHS OF EXPECTED LEISURE TRIPS IN 2021

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

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)

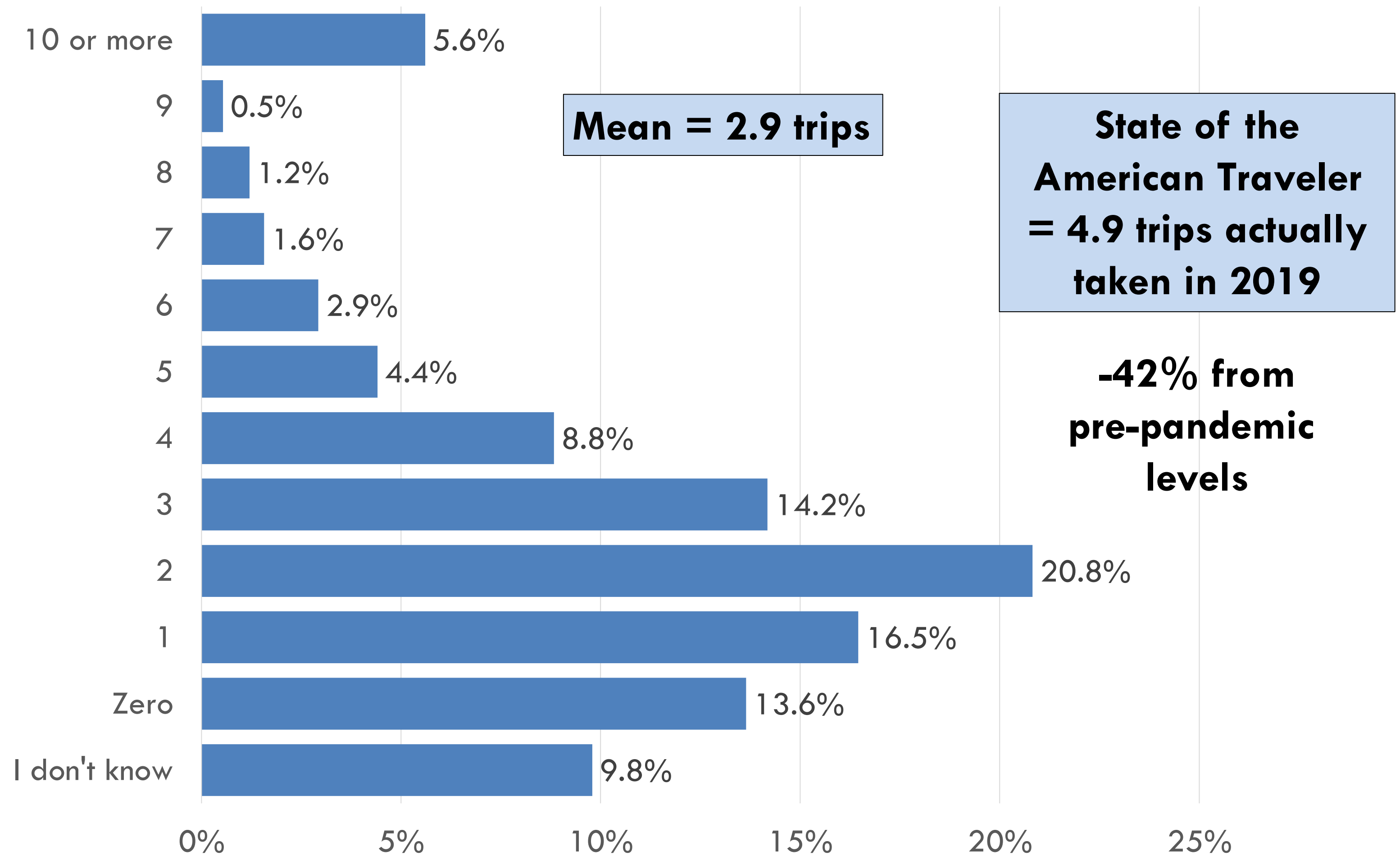




# EXPECTED NUMBER OF LEISURE TRIPS IN 2021

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

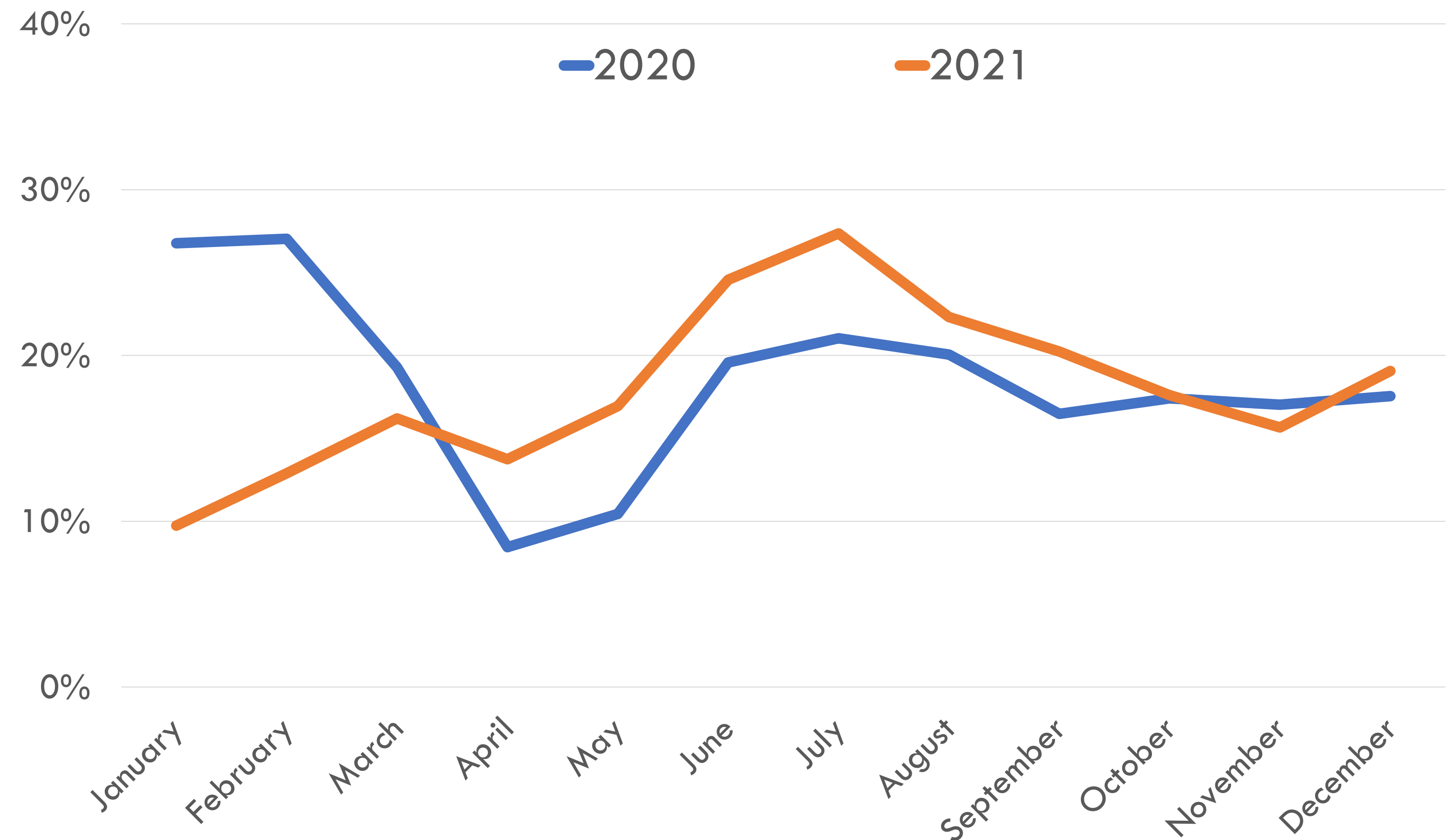
(Base: Waves 44 data. All respondents, 1,102 completed surveys. Data collected January 8-10, 2021)



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

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

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

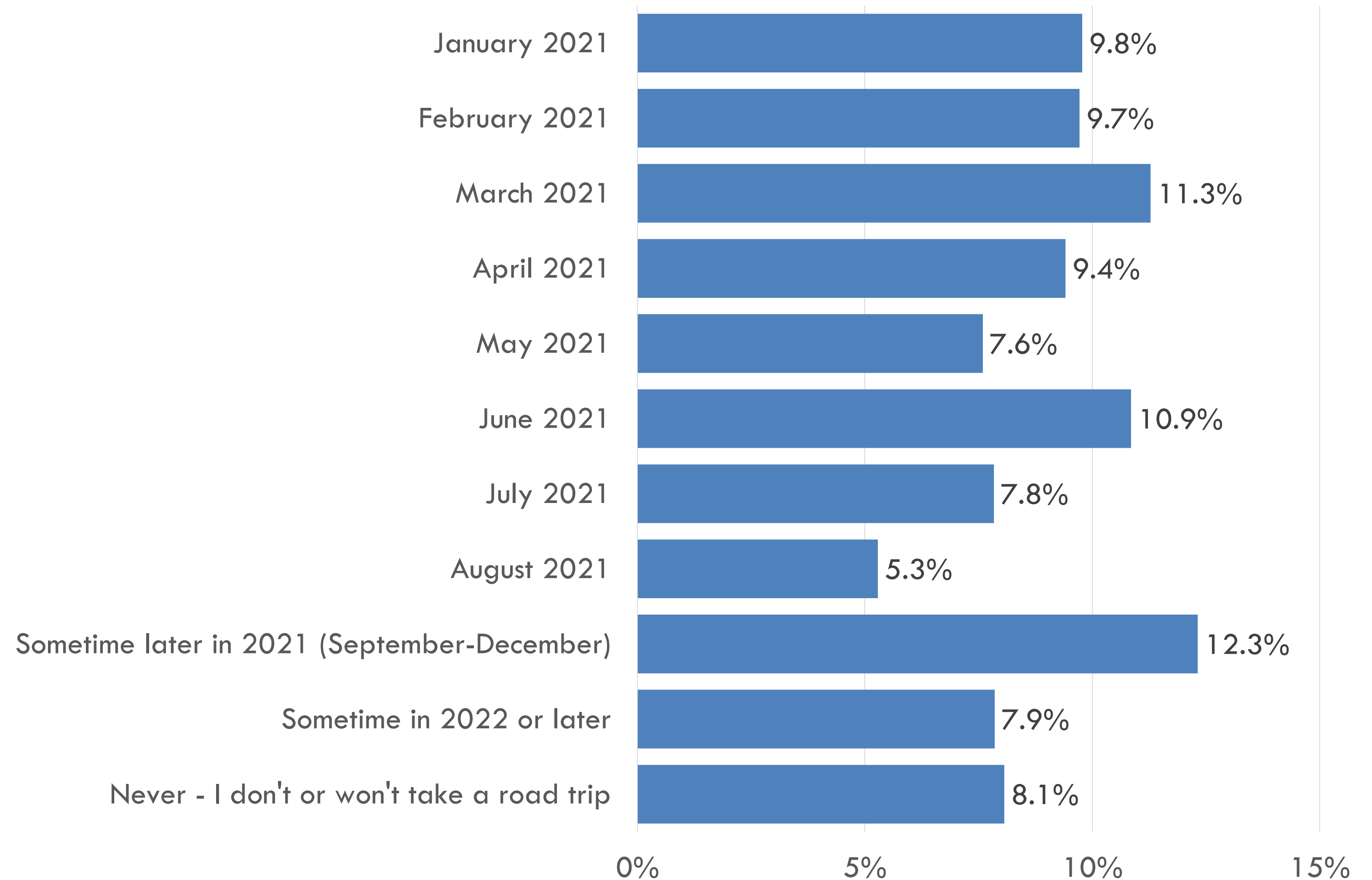


(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)

# MONTH OF NEXT ROAD TRIP

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

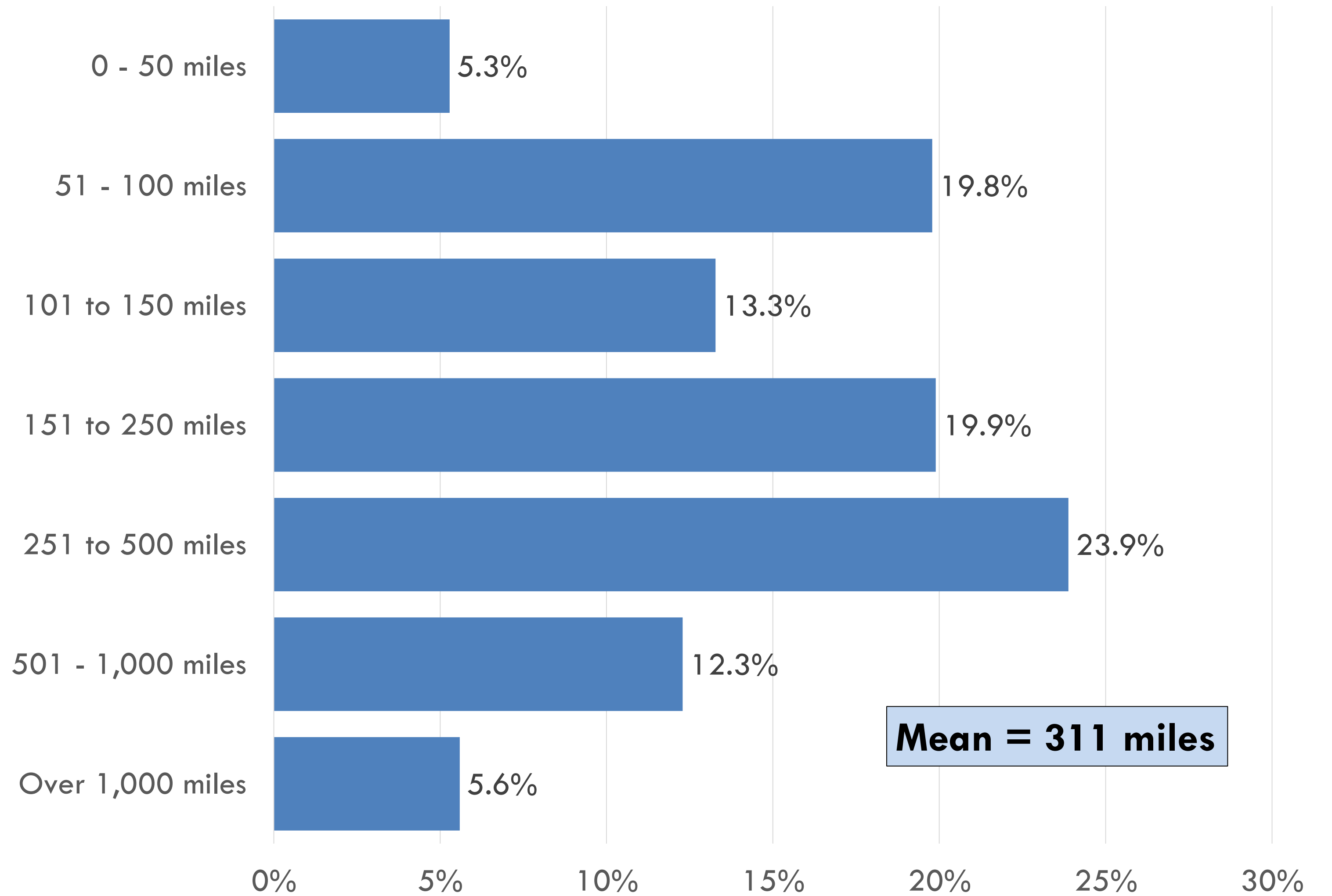
(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# NEXT ROAD TRIP: DISTANCE FROM HOME

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

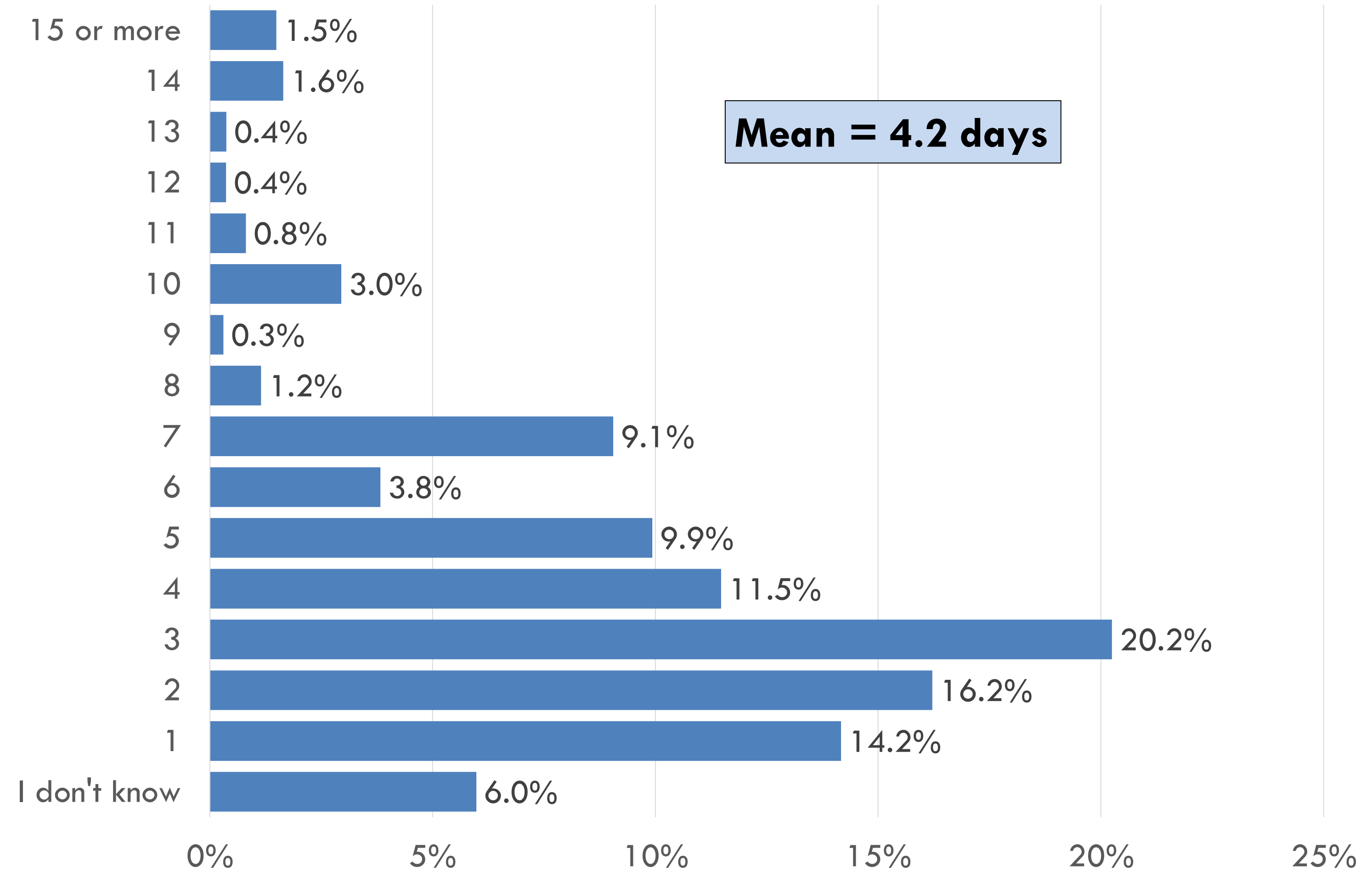
(Base: Waves 44 data. All respondents taking road trips, 1,131 completed surveys. Data collected January 8-10, 2021)



# NEXT ROAD TRIP: LENGTH OF TRIP

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

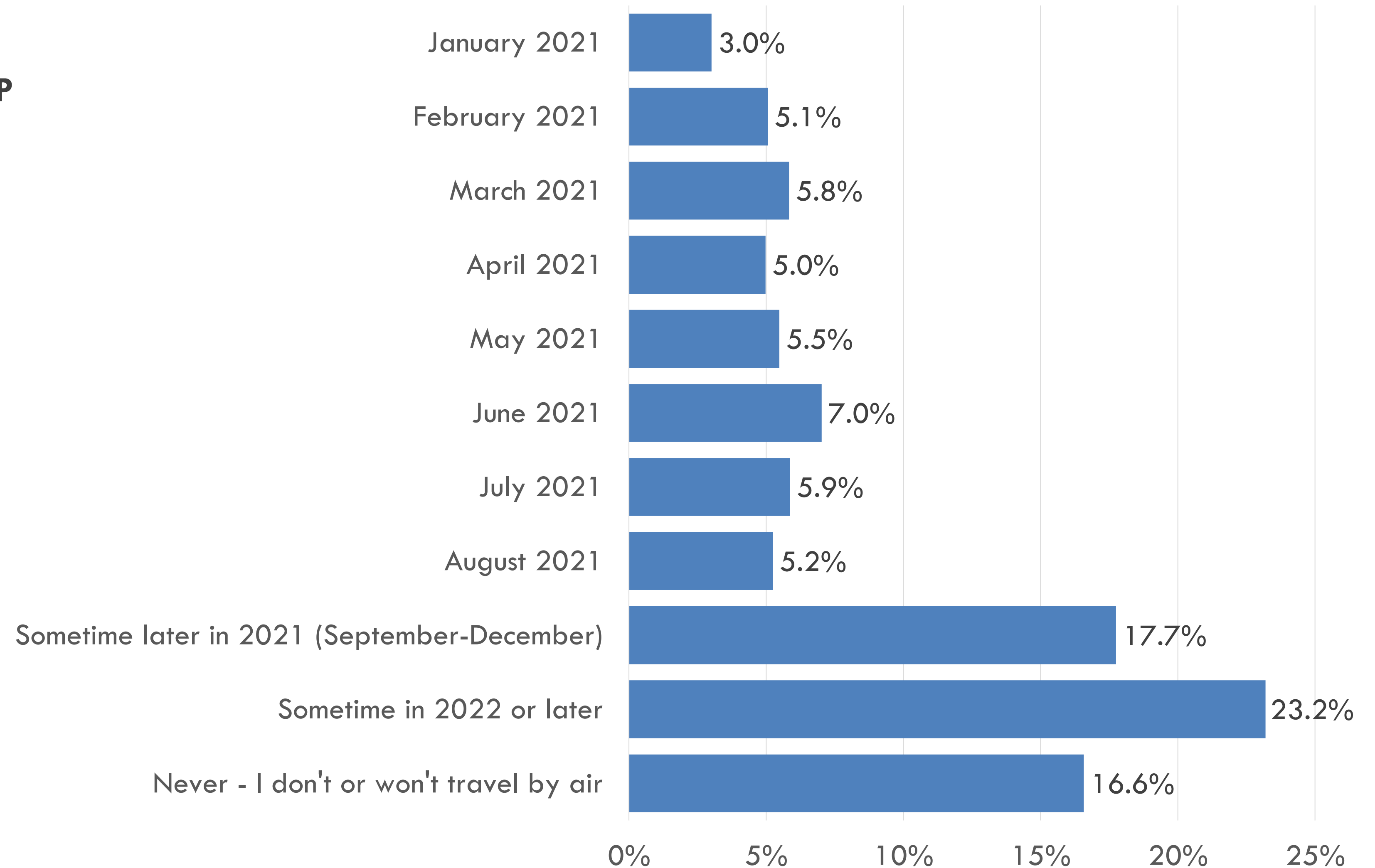
(Base: Waves 44 data. All respondents taking road trips, 1,057 completed surveys. Data collected January 8-10, 2021)



# MONTH OF NEXT COMMERCIAL AIRLINE FLIGHT

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

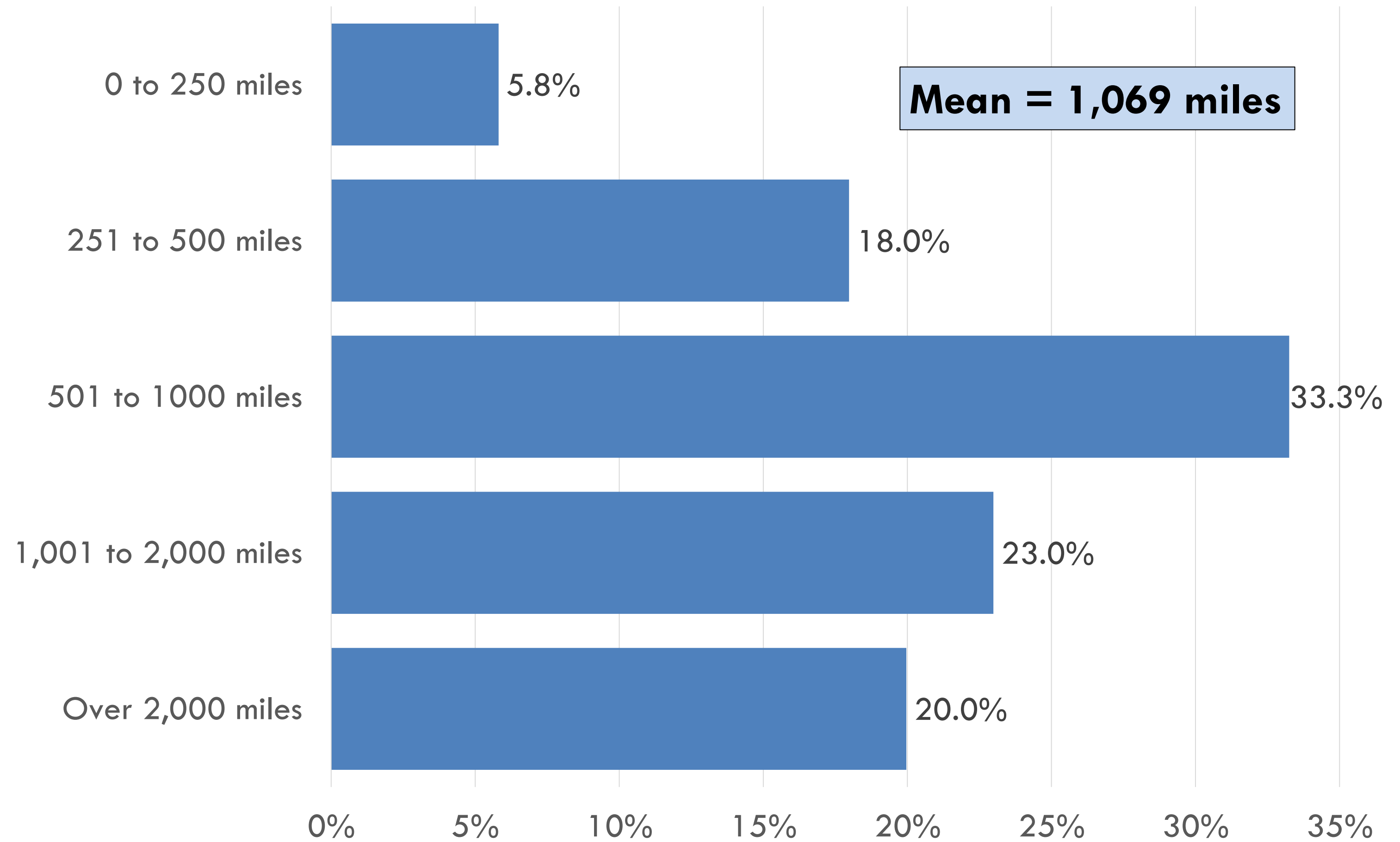
(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



# NEXT COMMERCIAL AIRLINE TRIP: DISTANCE FROM HOME

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

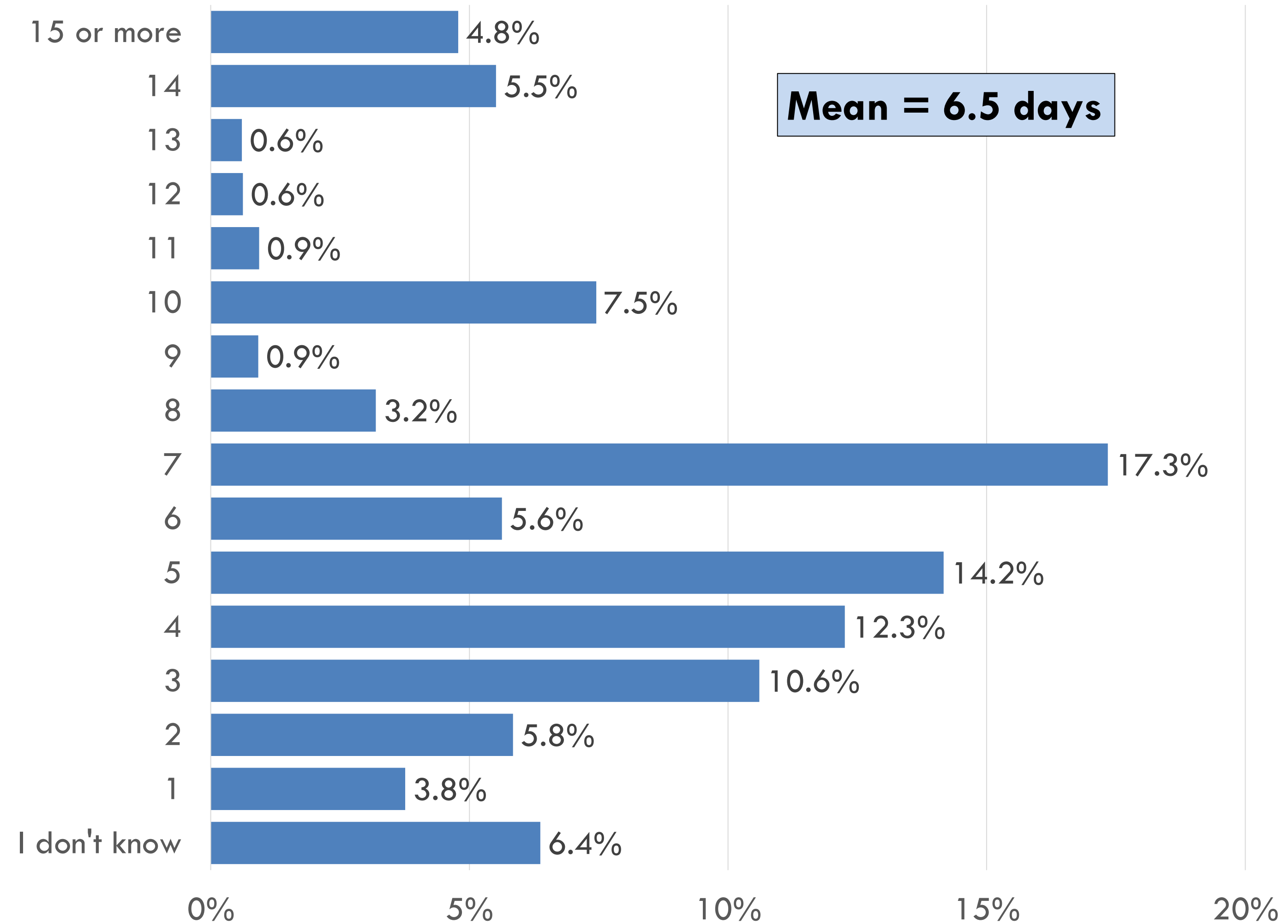
*(Base: Waves 44 data. All respondents taking commercial airline trips, 1,023 completed surveys. Data collected January 8-10, 2021)*



# NEXT COMMERCIAL AIRLINE TRIP: LENGTH OF TRIP

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

(Base: Waves 44 data. All respondents taking a commercial airline trip, 952 completed surveys. Data collected January 8-10, 2021)







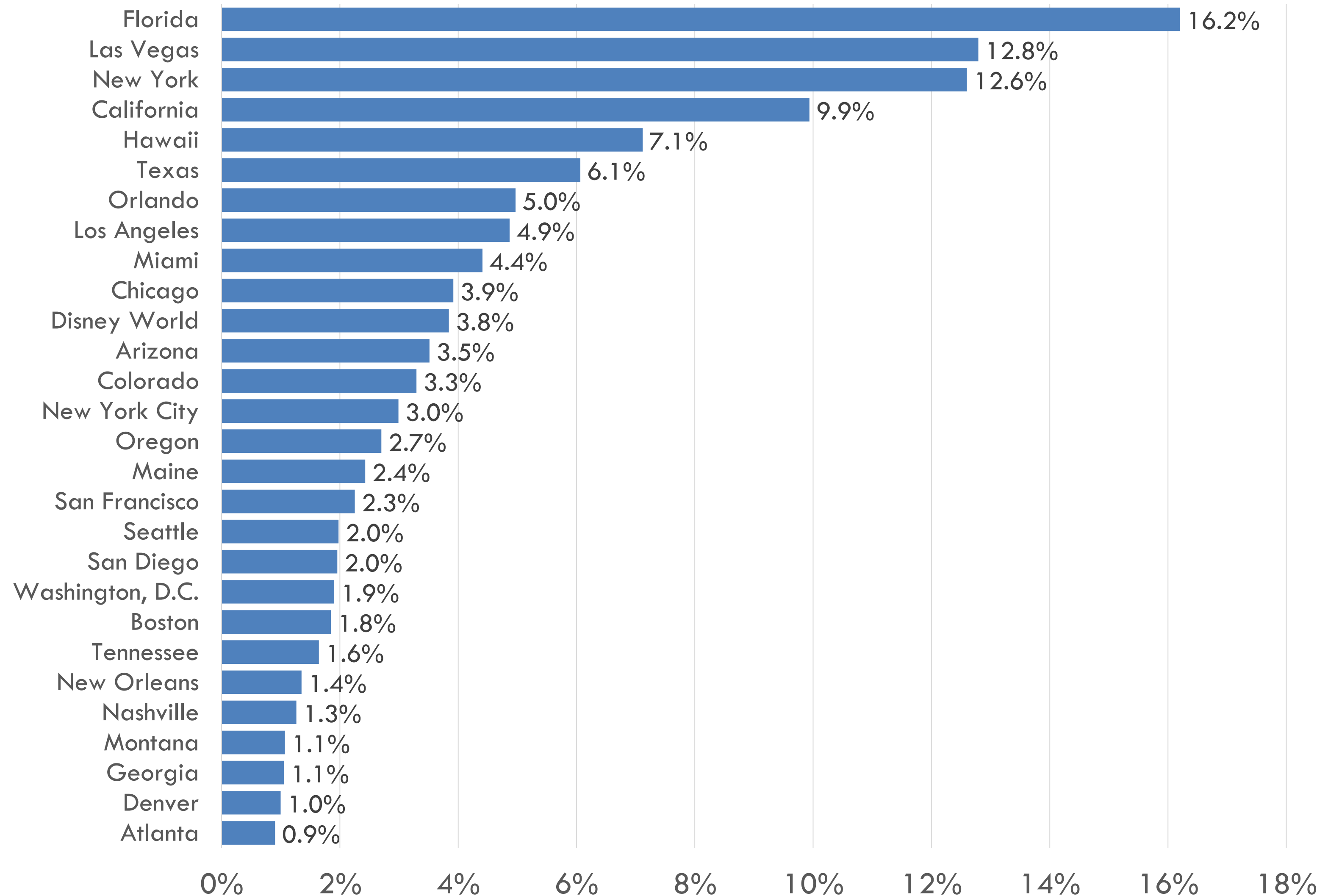
**LOOKING AHEAD**

# MOST DESIRED DOMESTIC DESTINATIONS

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

**(Please only include destinations in the United States)**

*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*

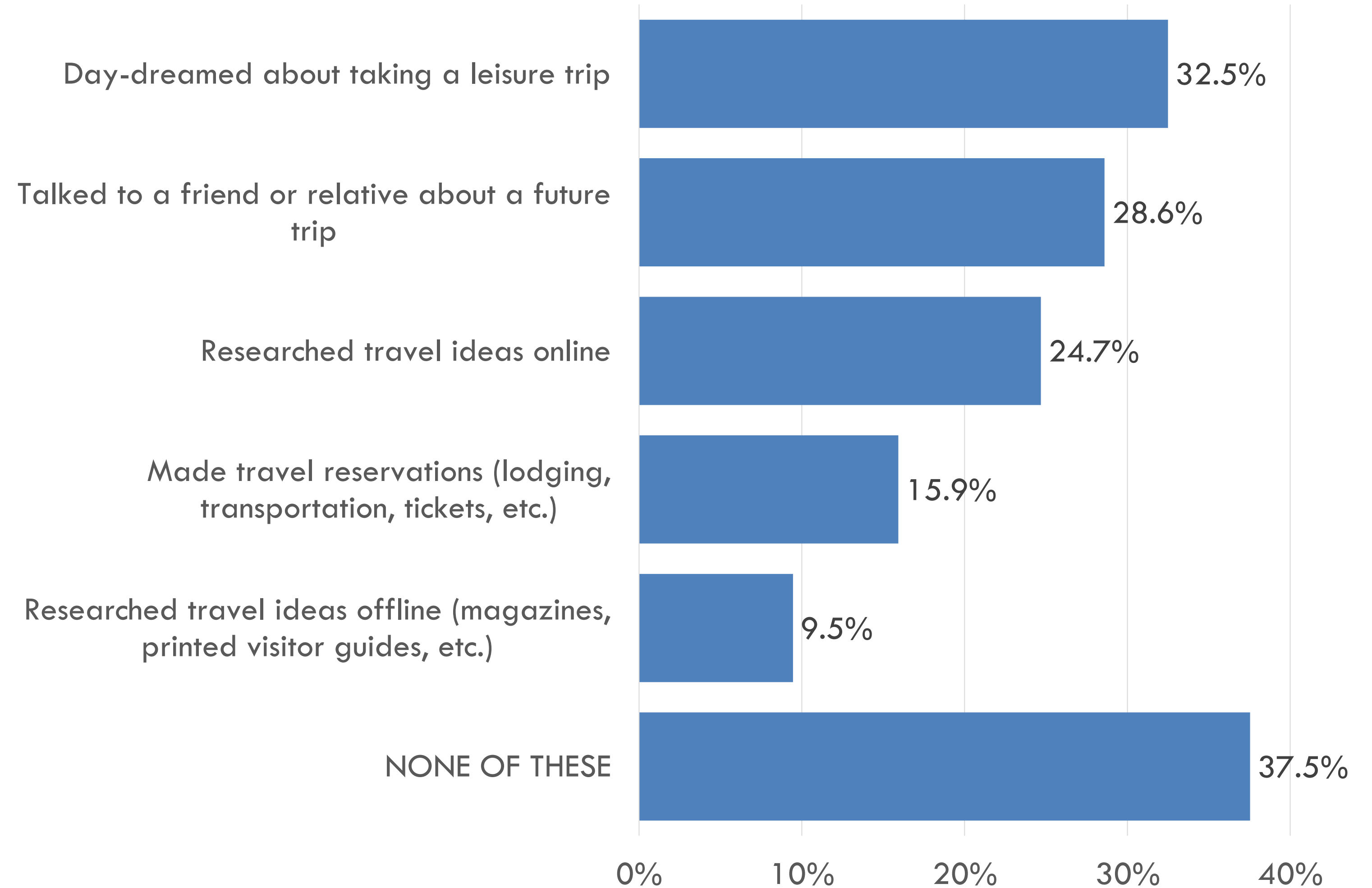


# TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have

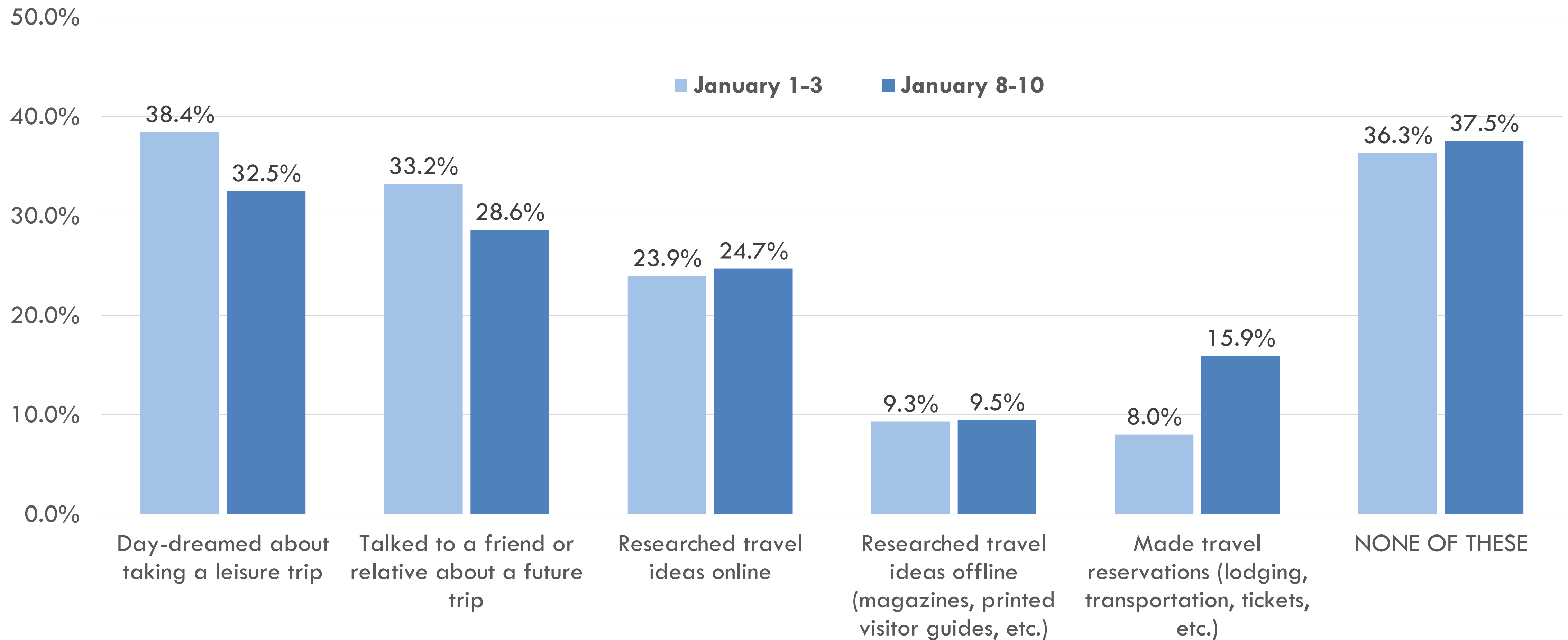
*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*



# TRAVEL PLANNING IN THE PAST WEEK

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

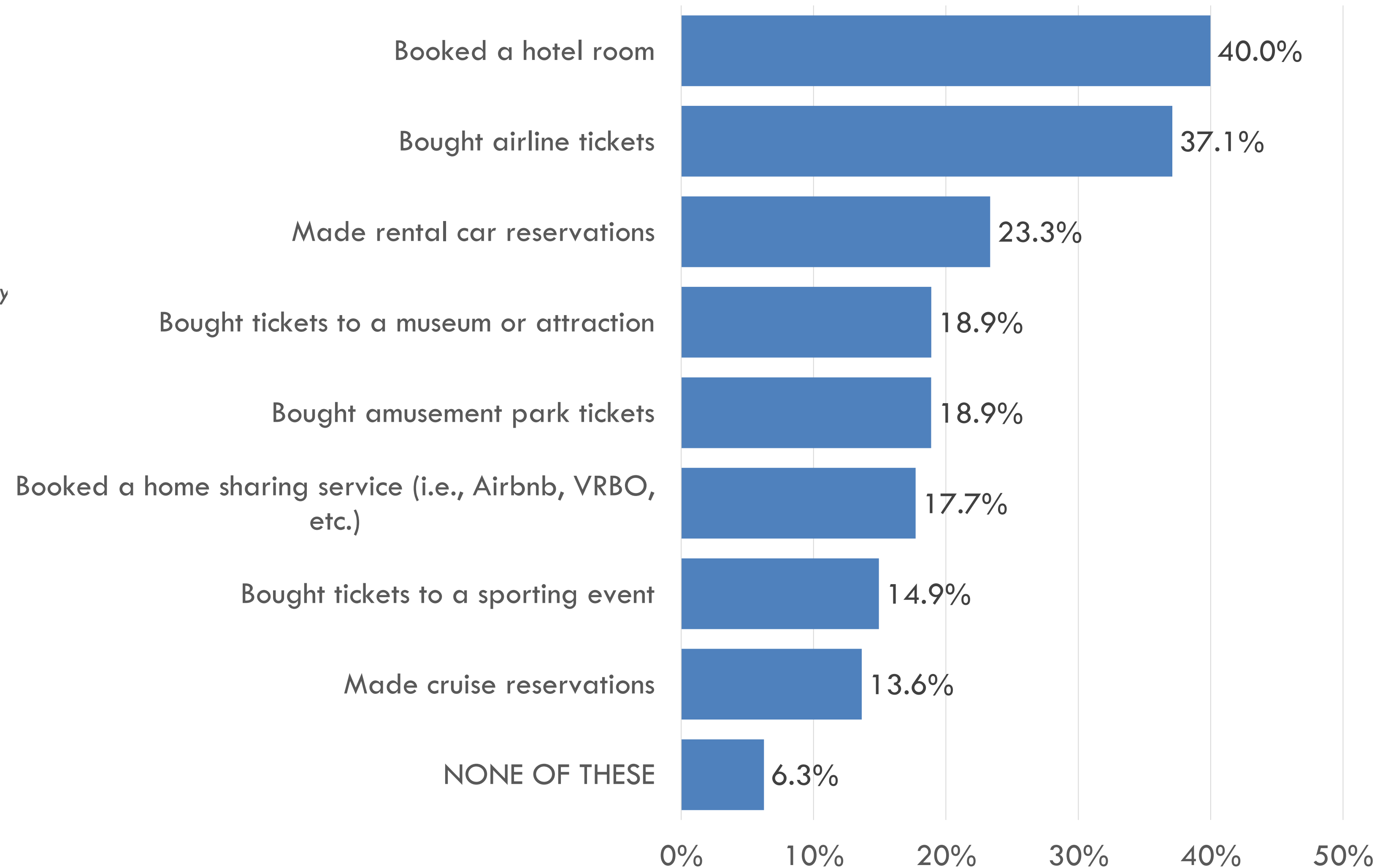
In the PAST WEEK I have \_\_\_\_\_



# TRAVEL RESERVATIONS MADE IN THE PAST WEEK

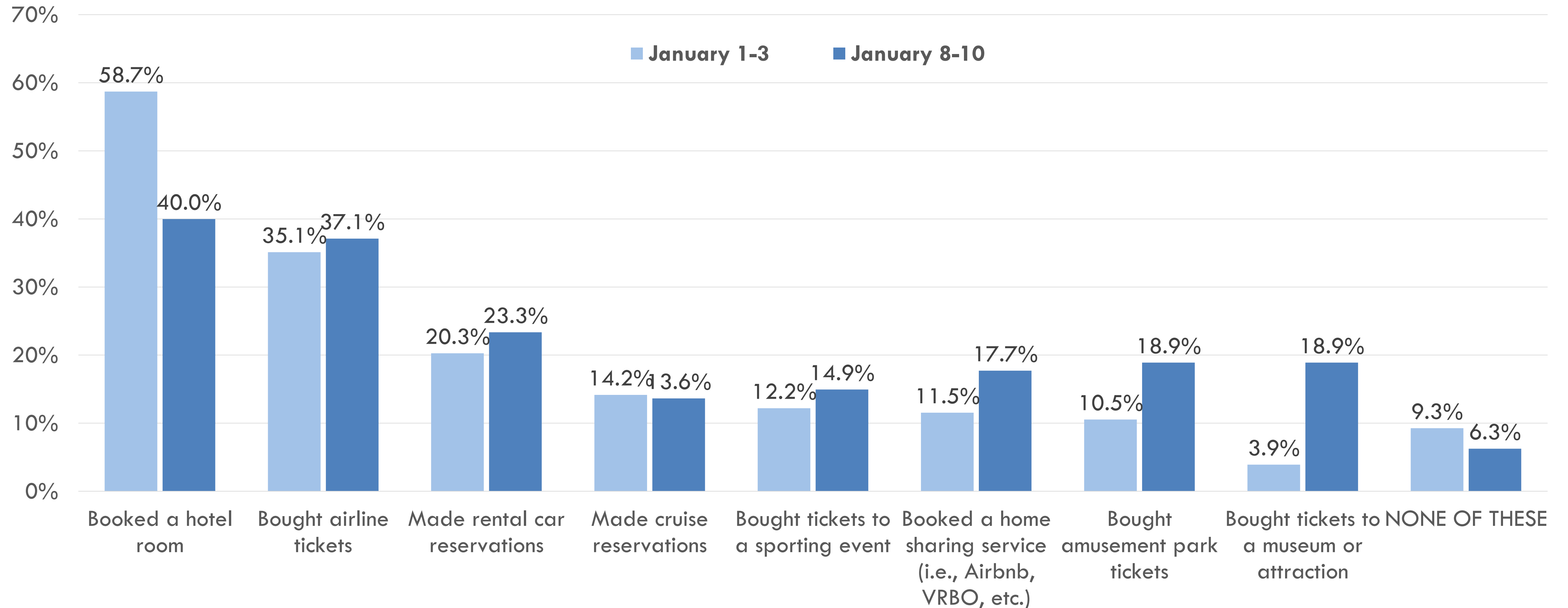
**Question:** Which of these travel reservations did you make this week? (Select all that apply)

*(Base: Waves 44 data. Respondents who made travel reservations this week, 178 completed survey  
Data collected January 8-10, 2021)*



# TRAVEL RESERVATIONS MADE IN THE PAST WEEK

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

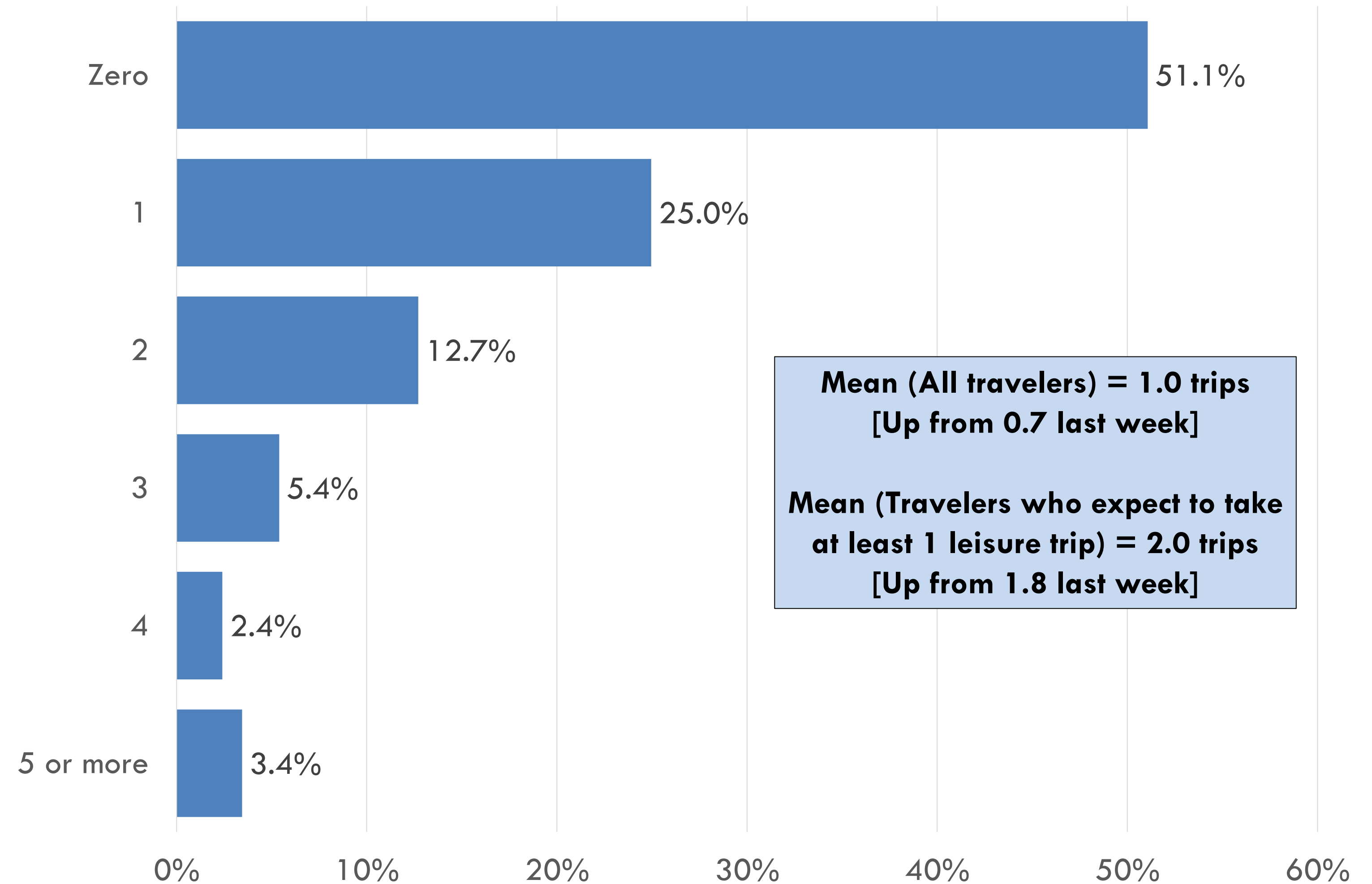


# LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

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

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

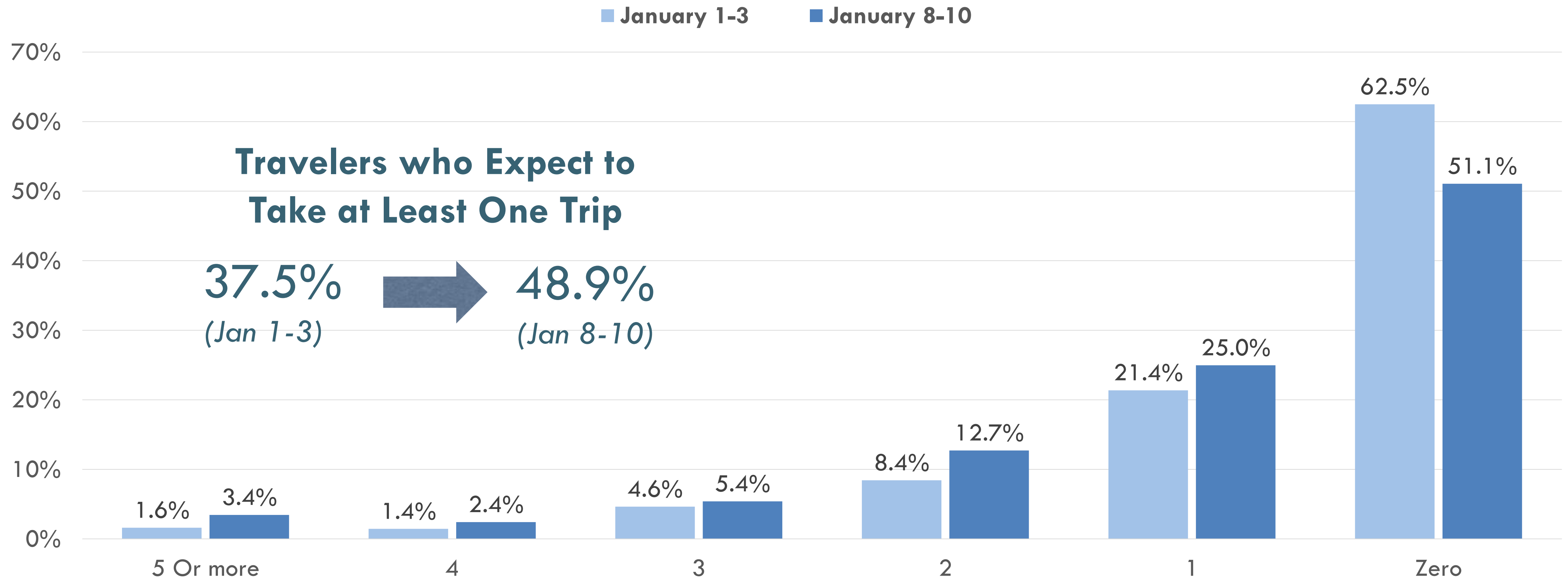
*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)*



# LEISURE TRIPS EXPECTED (NEXT 3 MONTHS)

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

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

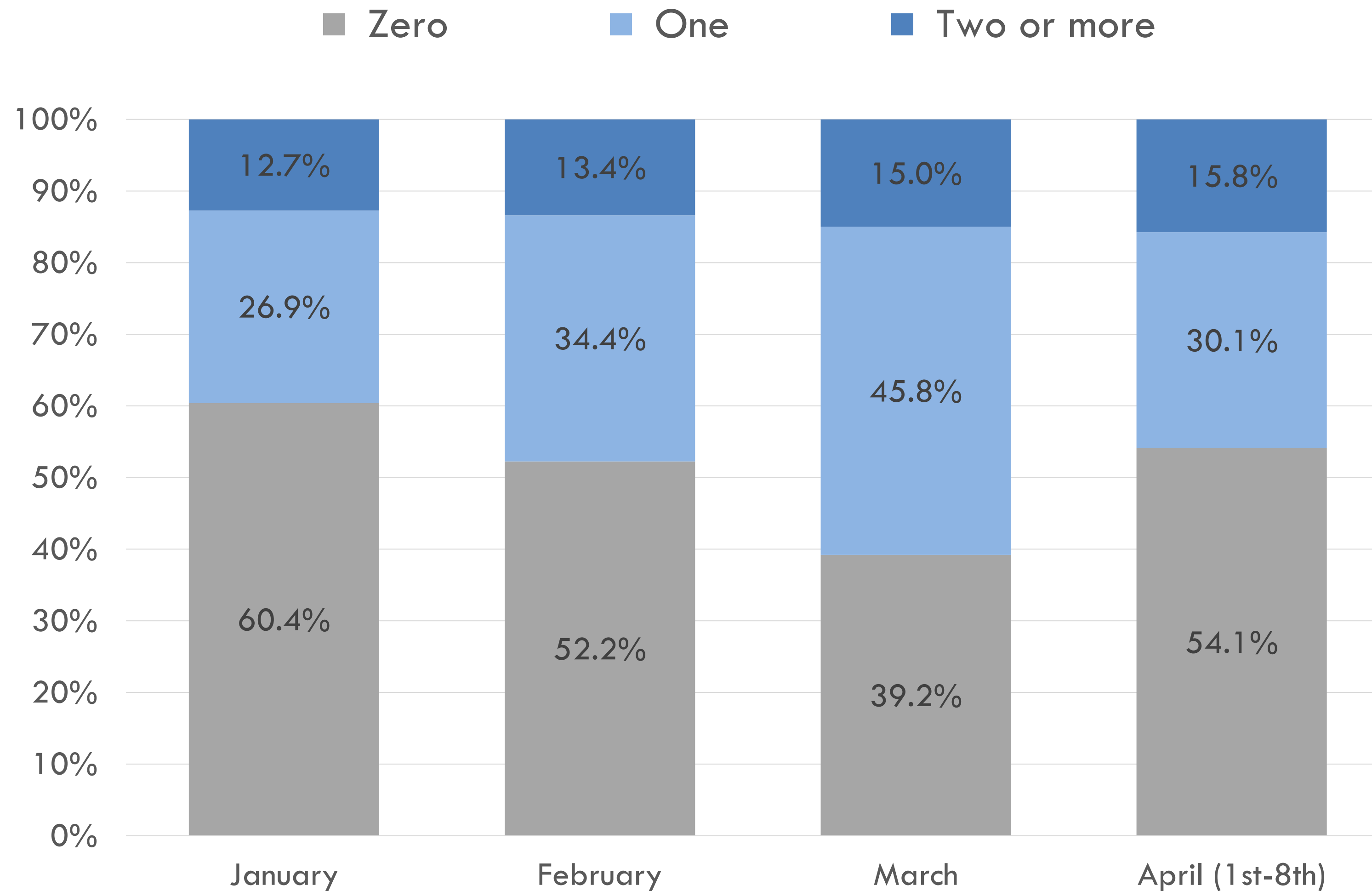




# LEISURE TRIPS EXPECTED (BY MONTH)

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

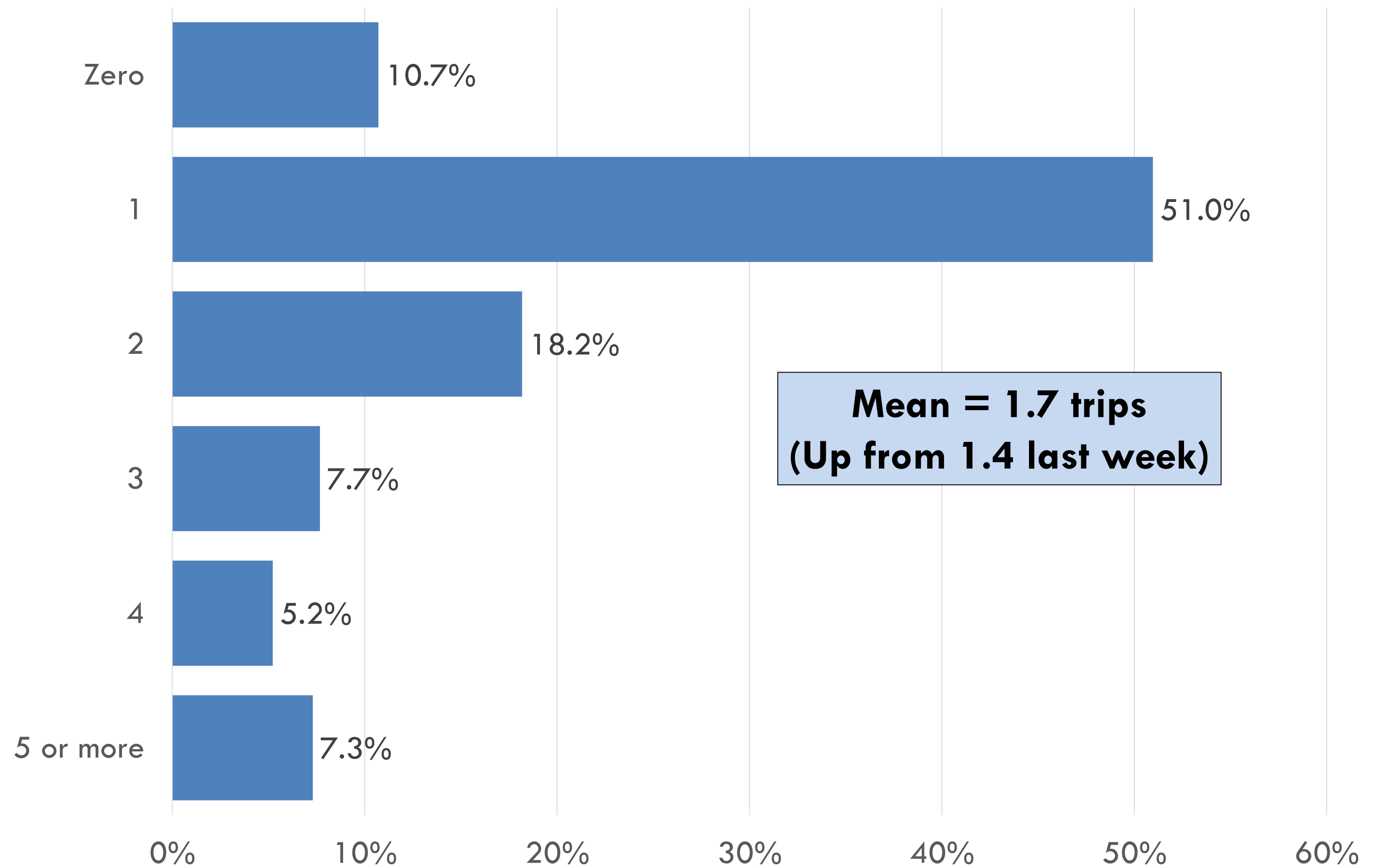
*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# OVERNIGHT TRIPS EXPECTED (NEXT 3 MONTHS)

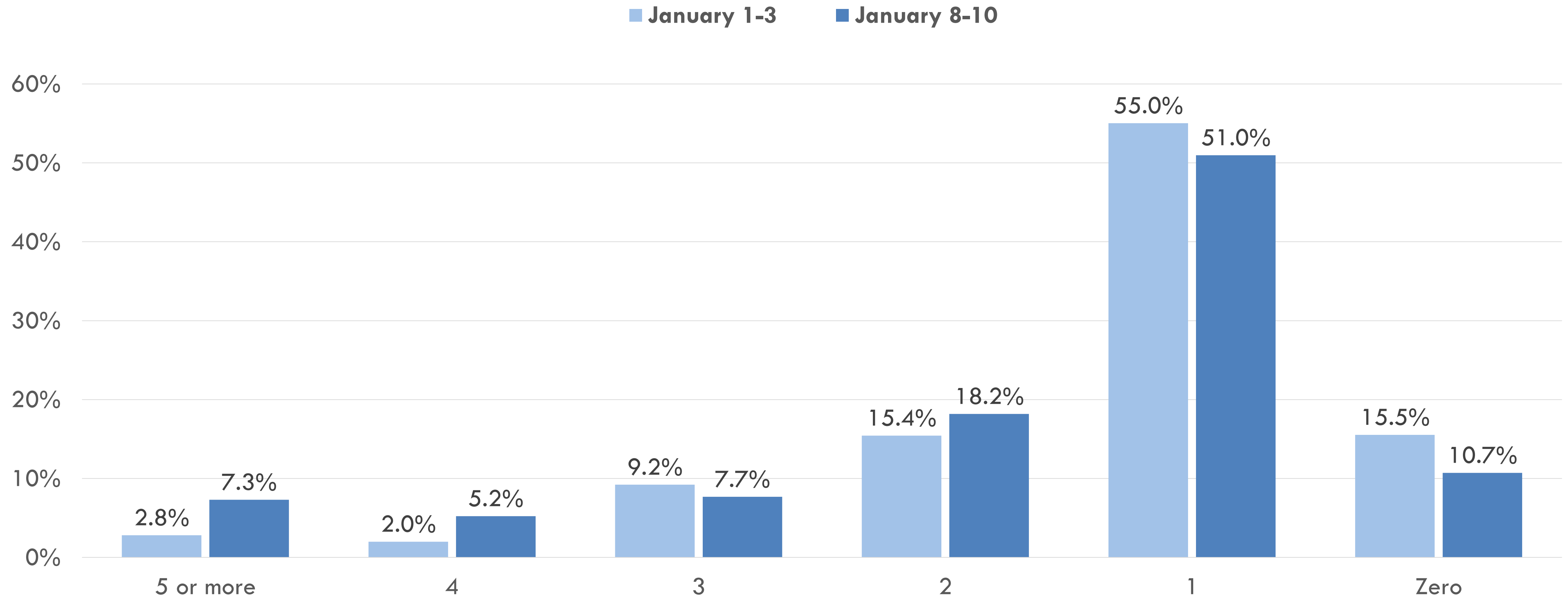
**Question:** How many of these leisure trips will be **OVERNIGHT TRIPS** (i.e., trips including at least one night away from your home)?

*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# OVERNIGHT TRIPS EXPECTED (NEXT 3 MONTHS)

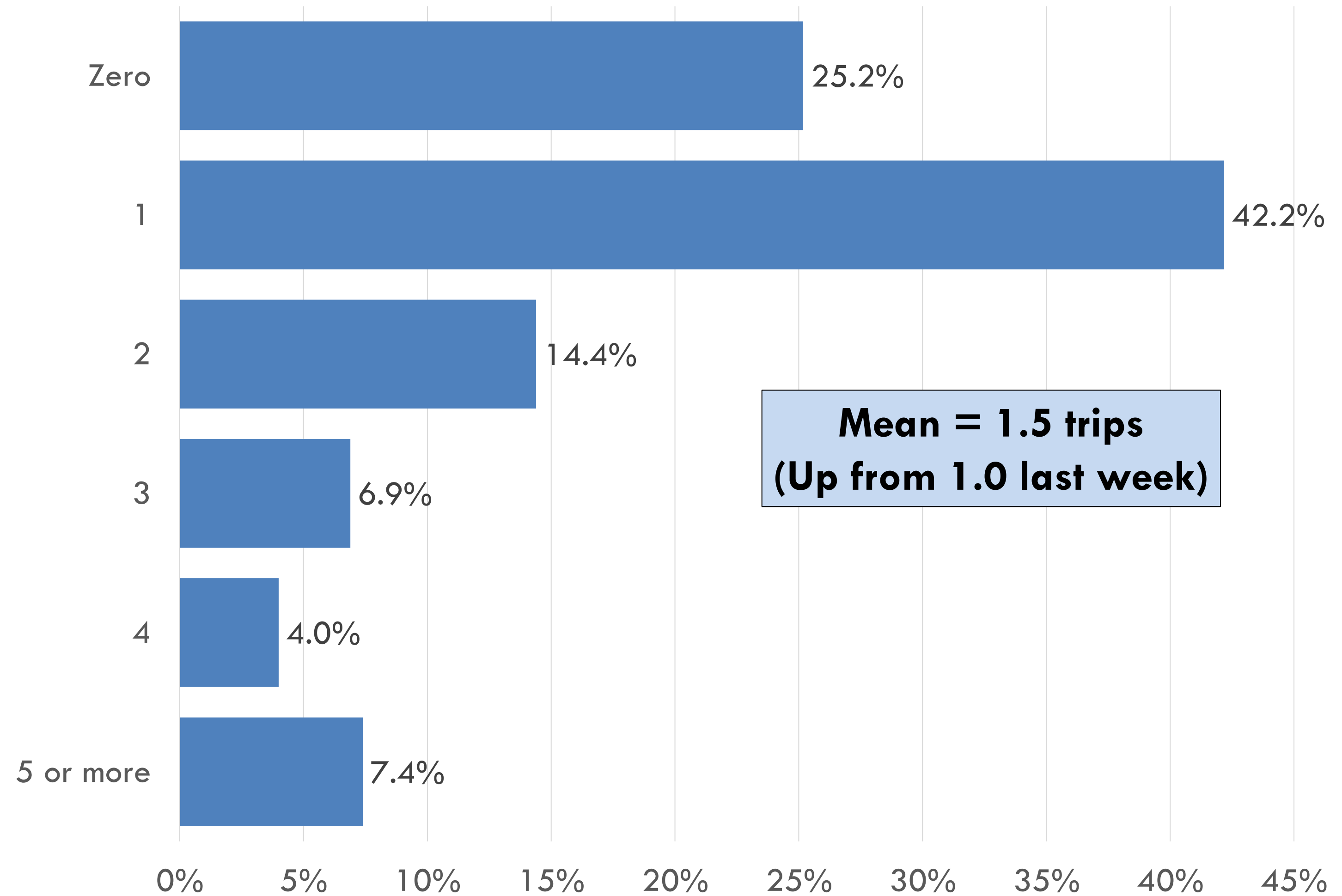
**Question:** How many of these leisure trips will be OVERNIGHT TRIPS (i.e., trips including at least one night away from your home)?



# REGIONAL TRIPS EXPECTED (NEXT 3 MONTHS)

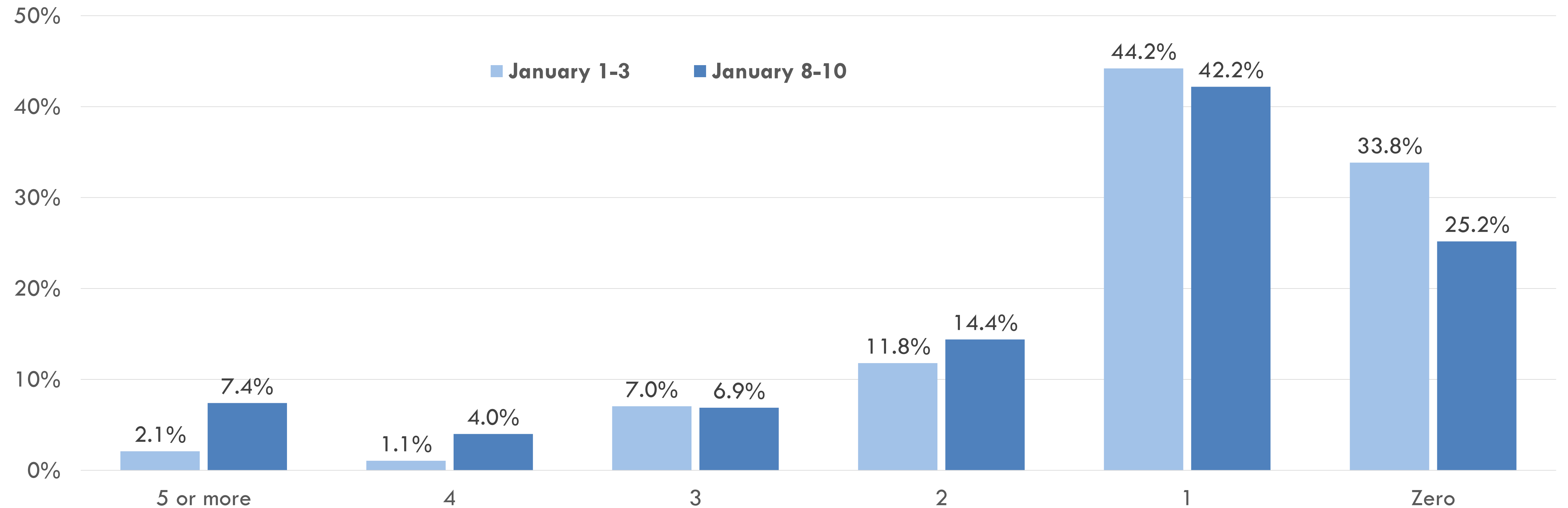
**Question:** How many of these leisure trips will be REGIONAL TRIPS (travel less than 250 miles from your home)?

*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# REGIONAL TRIPS EXPECTED (NEXT 3 MONTHS)

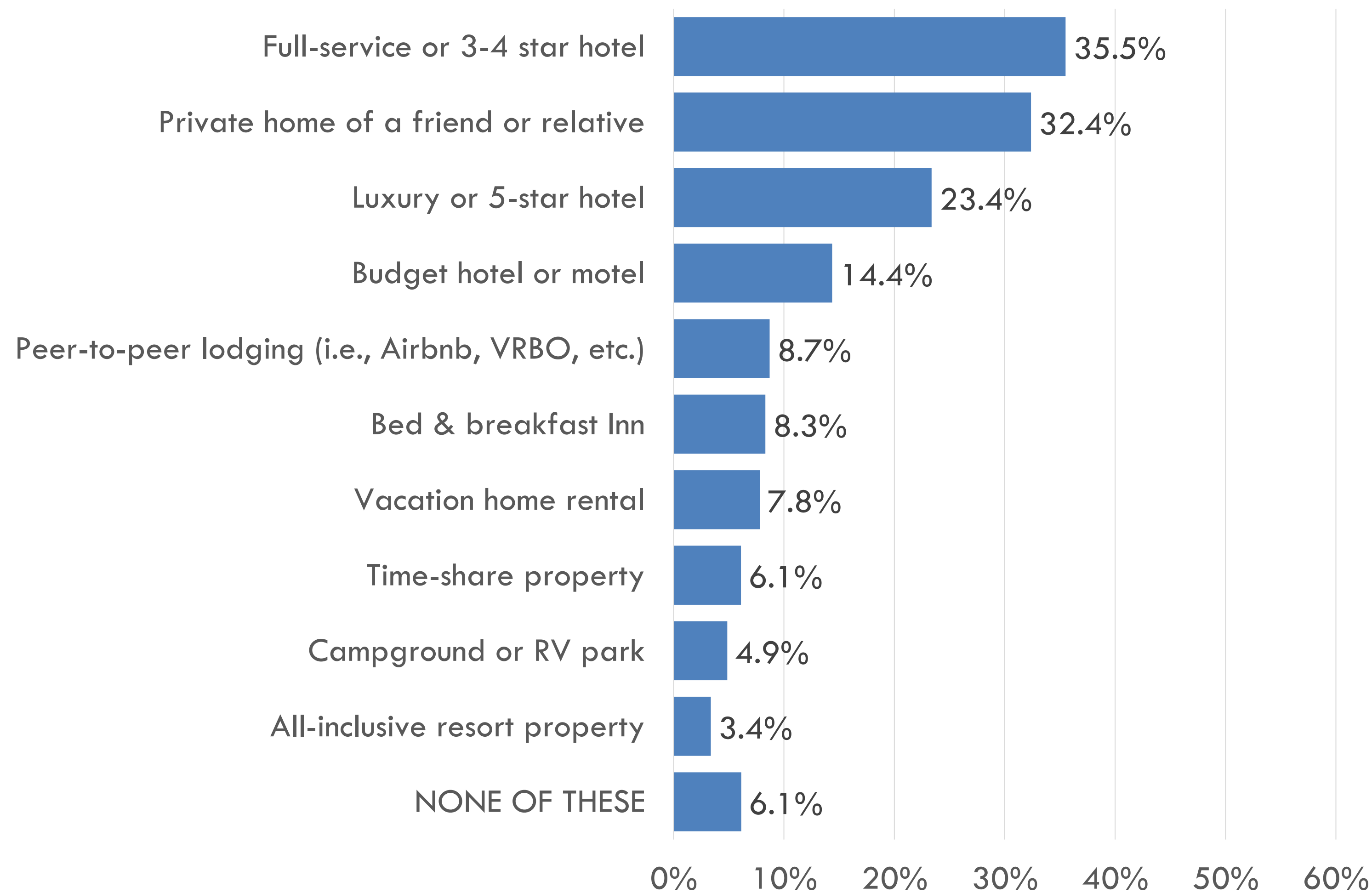
**Question:** How many of these leisure trips will be REGIONAL TRIPS (travel less than 250 miles from your home)?



# EXPECTED PLACE OF STAY (NEXT THREE MONTHS)

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

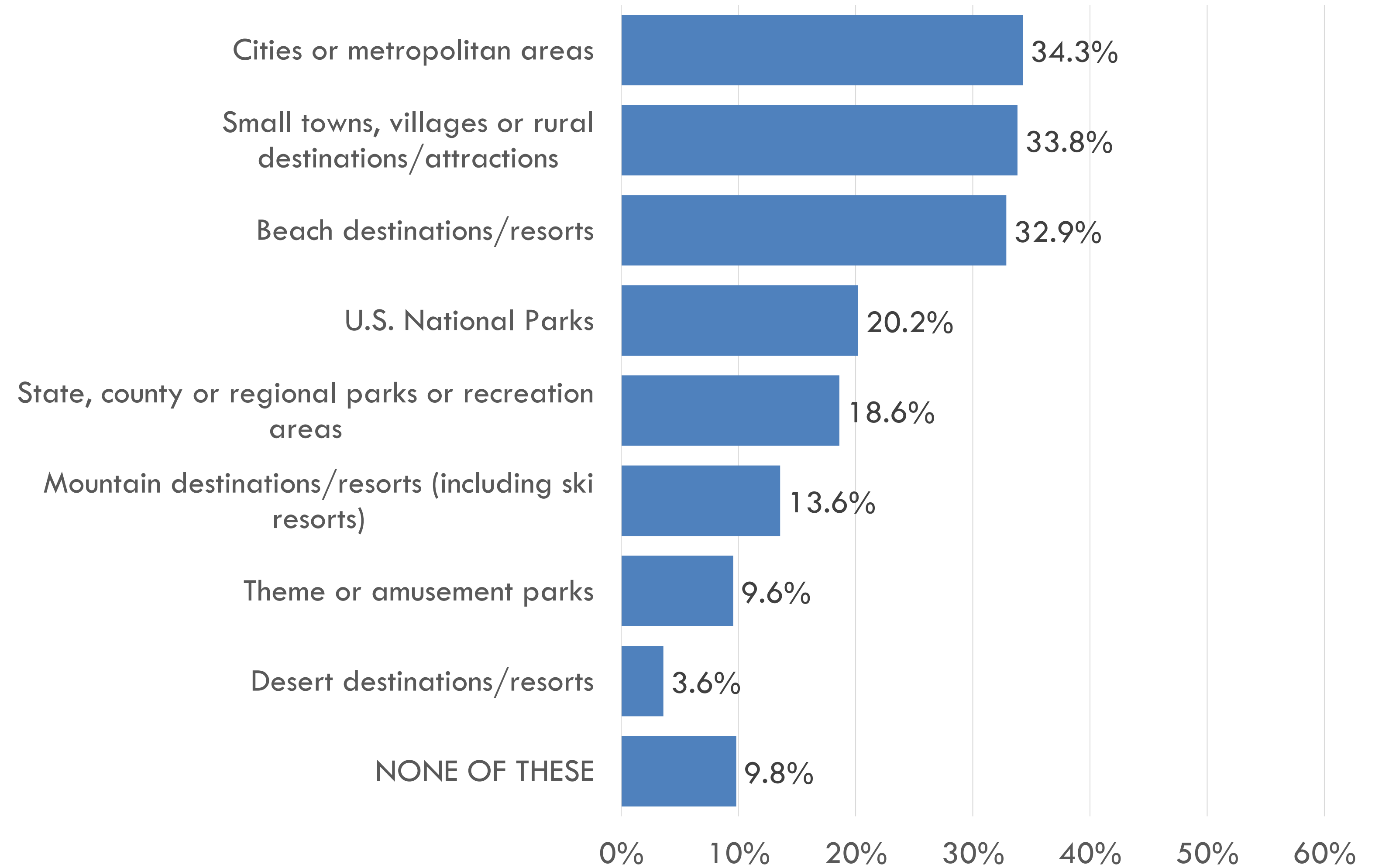
*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# DESTINATION TYPES EXPECTED (NEXT THREE MONTHS)

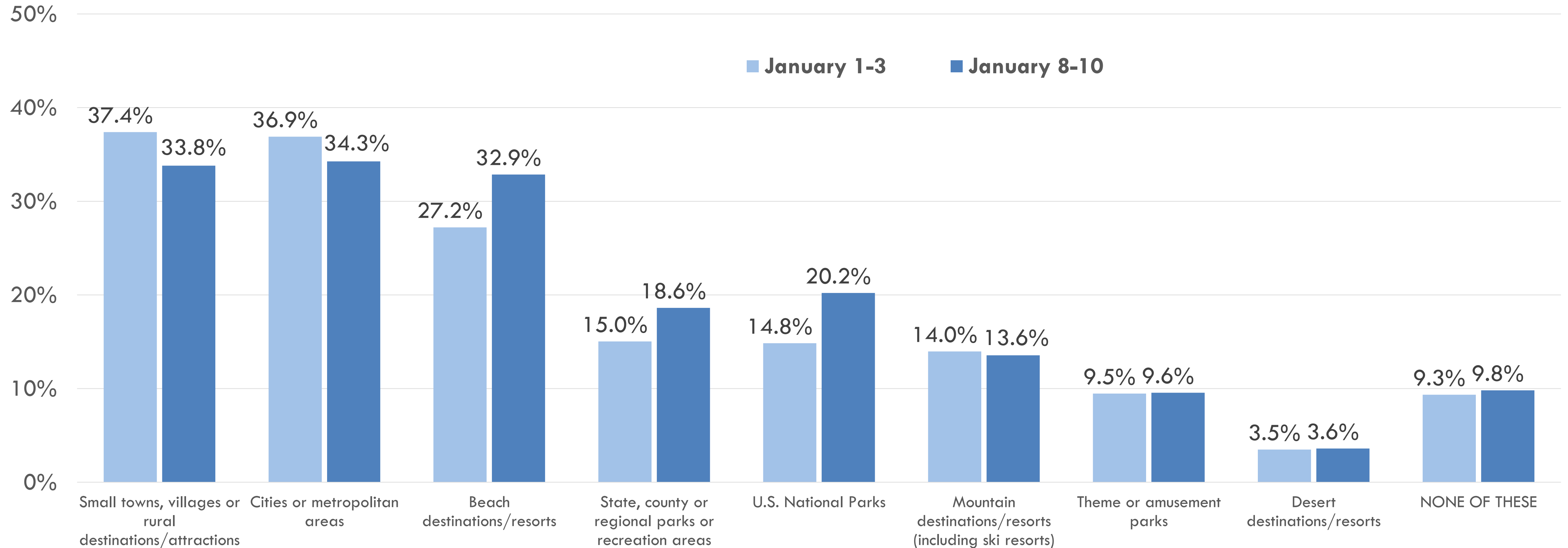
**Question:** On these leisure trips, which of the following are you expecting to visit?

*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# DESTINATION TYPES EXPECTED (NEXT THREE MONTHS)

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

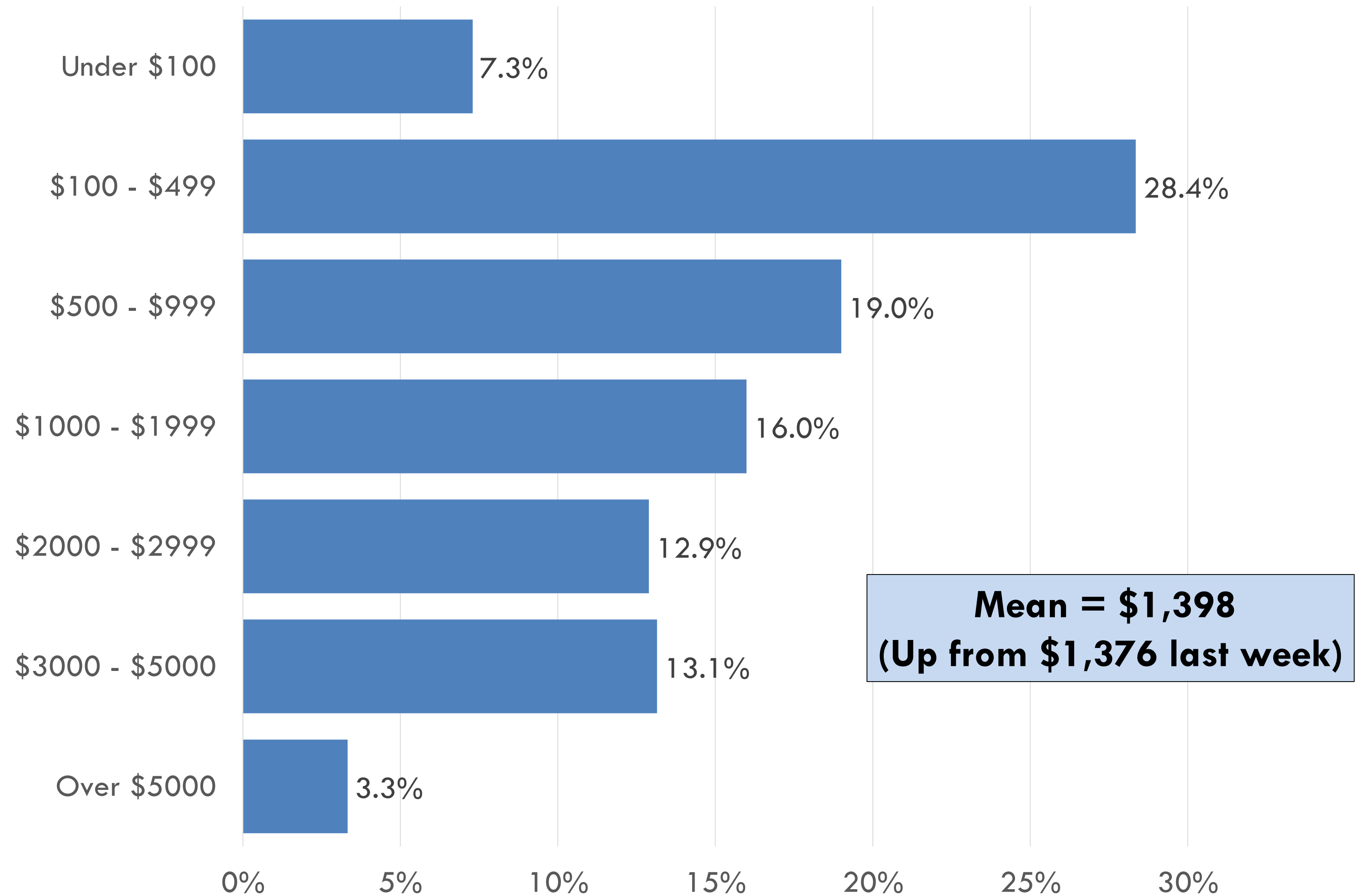




# EXPECTED LEISURE TRAVEL SPENDING (NEXT 3 MONTHS)

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

*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 556 completed surveys. Data collected January 8-10, 2021)*

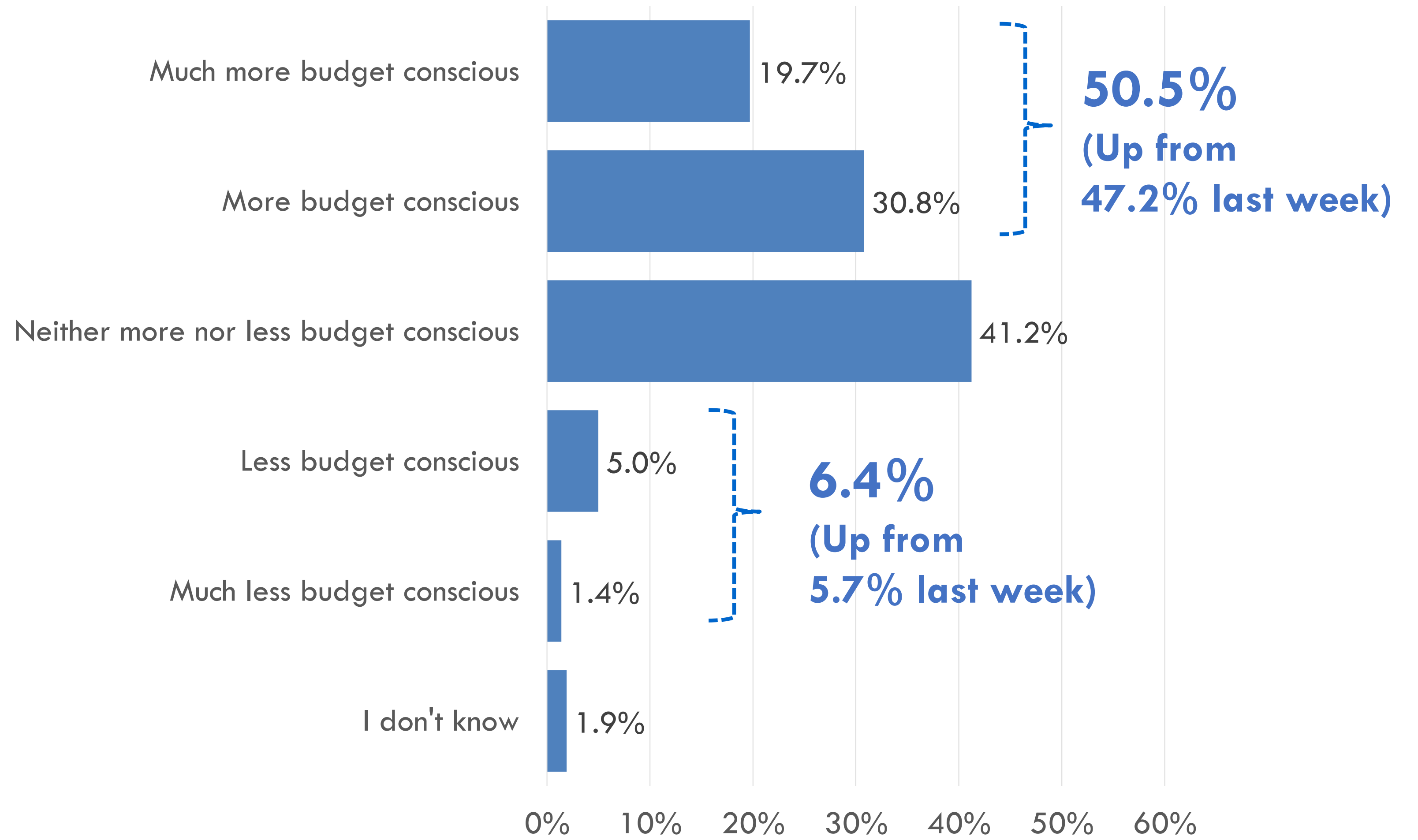


# BUDGET CONSCIOUSNESS AROUND TRAVEL (NEXT 3 MONTHS)

**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 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)

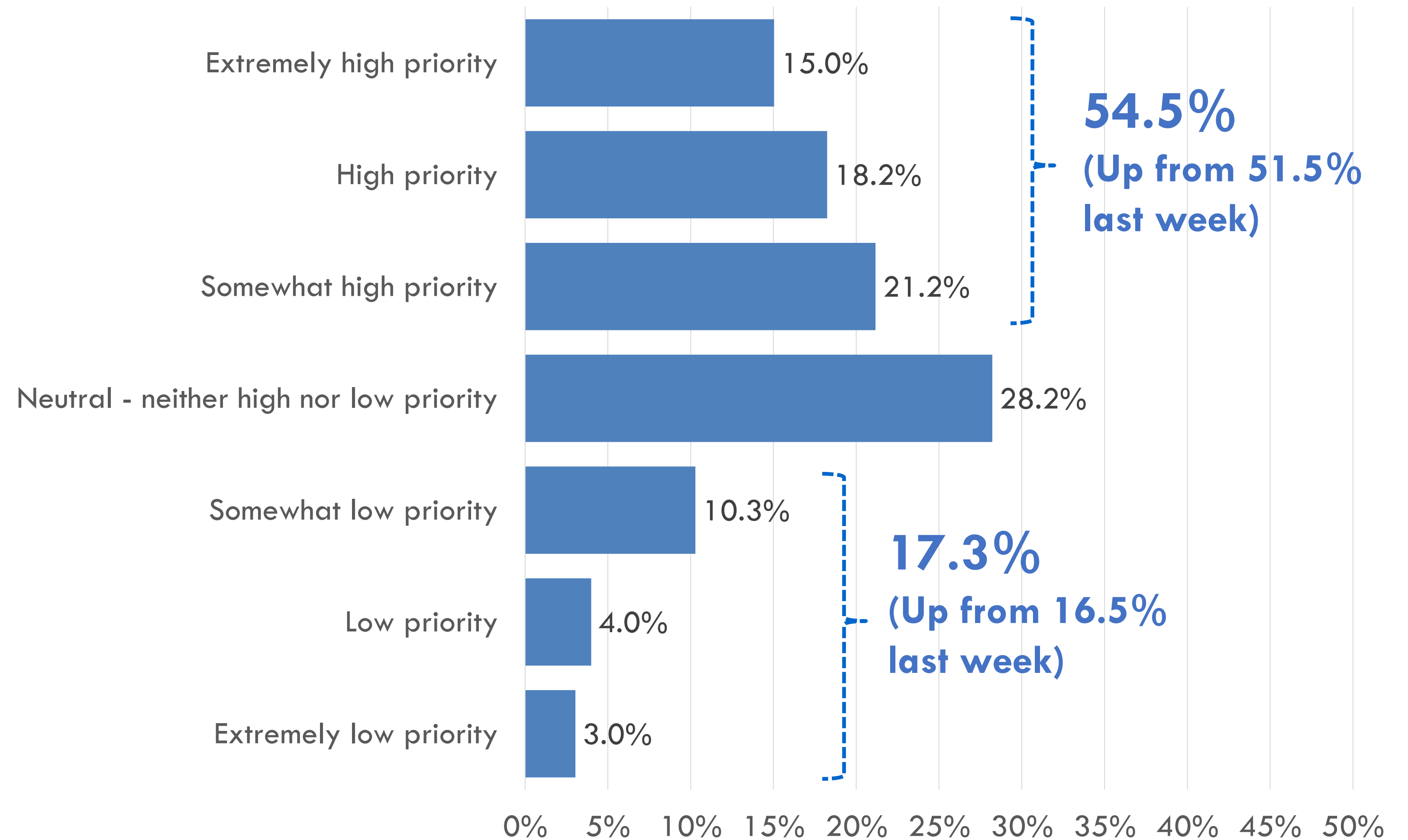


# LEISURE TRAVEL AS A BUDGET PRIORITY (NEXT 3 MONTHS)

**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

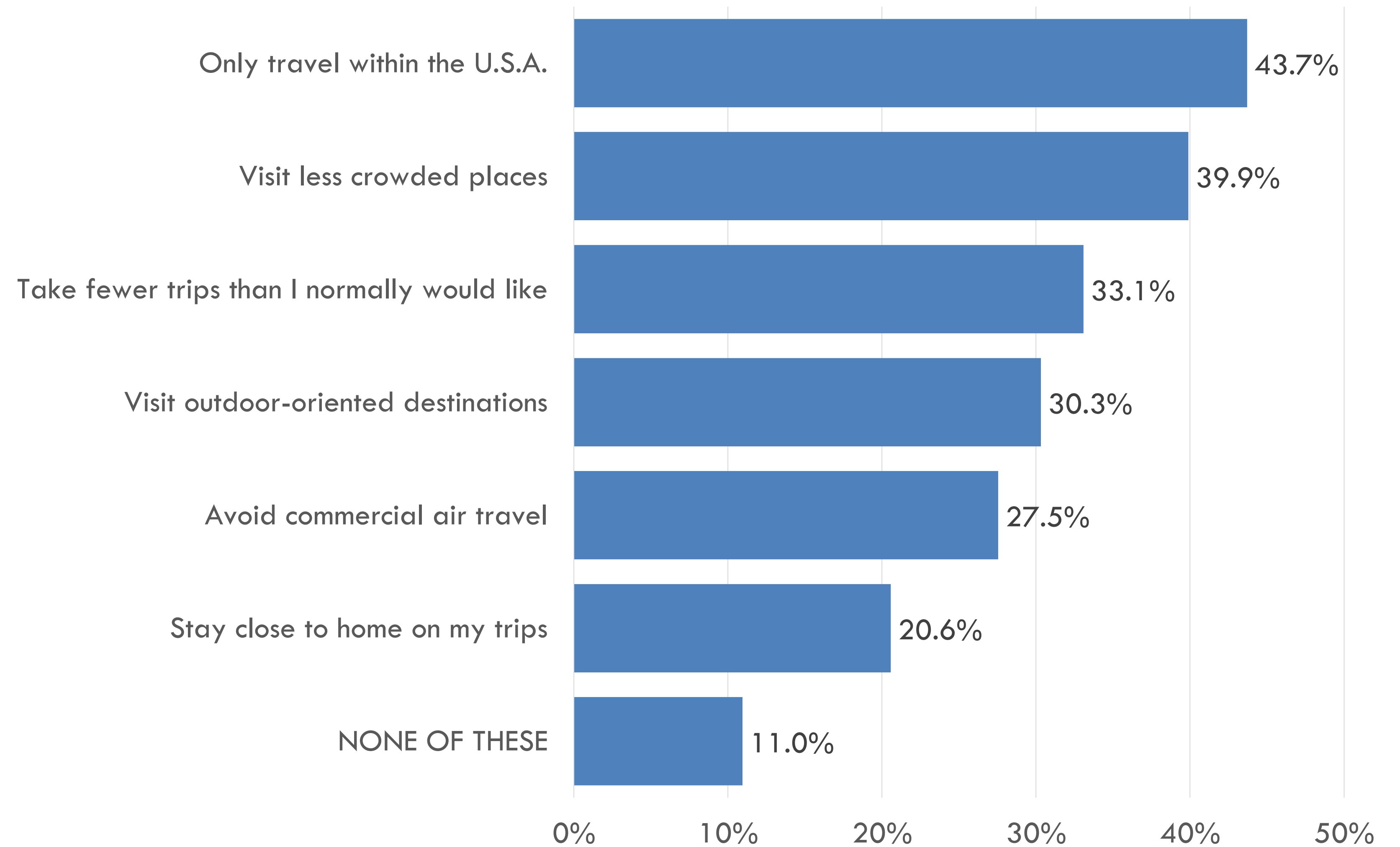
(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)



# EXPECTATIONS FOR ADAPTING TO THE PANDEMIC (NEXT 3 MONTHS)

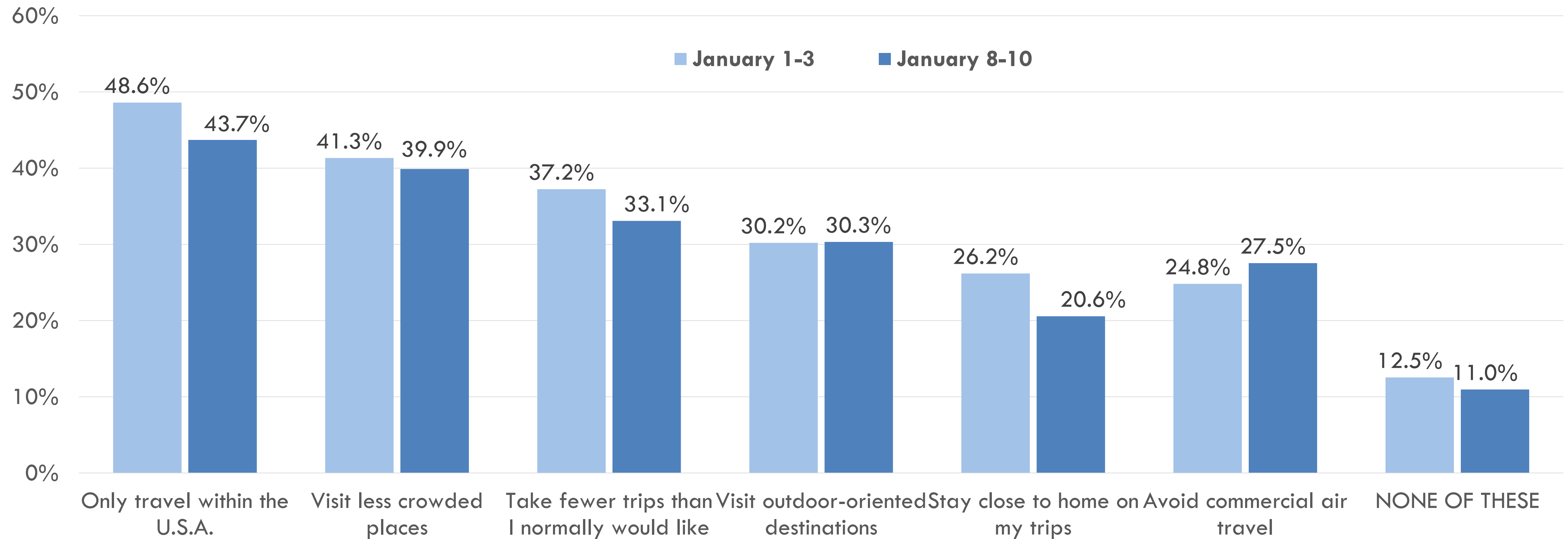
**Question:** In the **NEXT THREE MONTHS**, which of these actions do you expect to take as a result of the ongoing **COVID-19** pandemic? (Select all that apply)

*(Base: Waves 44 data. Respondents expecting to travel in the next three months, 587 completed surveys. Data collected January 8-10, 2021)*



# EXPECTATIONS FOR ADAPTING TO THE PANDEMIC (NEXT 3 MONTHS)

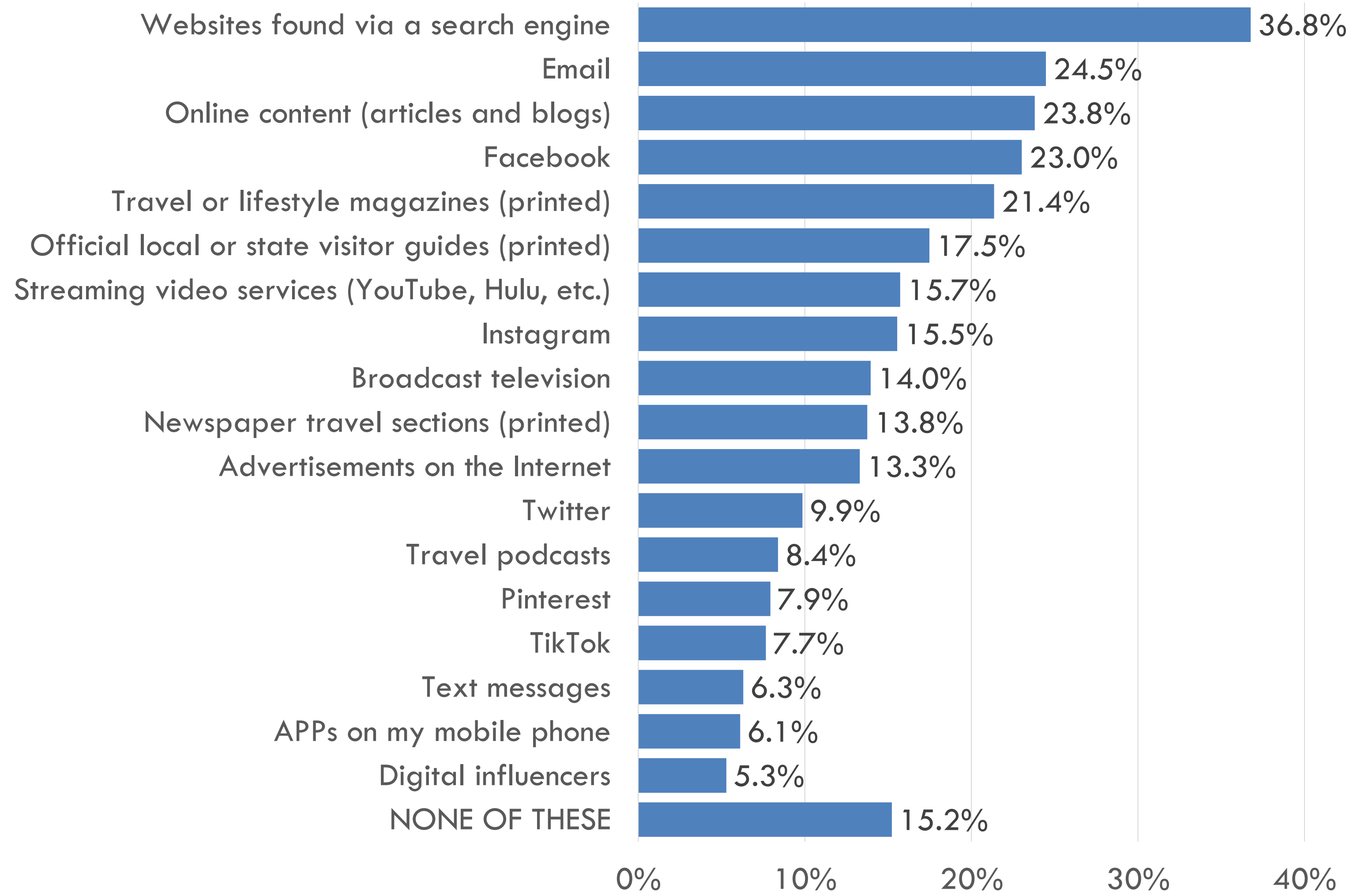
**Question:** In the NEXT THREE MONTHS, which of these actions do you expect to take as a result of the ongoing COVID-19 pandemic? (Select all that apply)



# RECEPTIVITY TO MARKETING CHANNELS

**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)

*(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected December 8-10, 2021)*

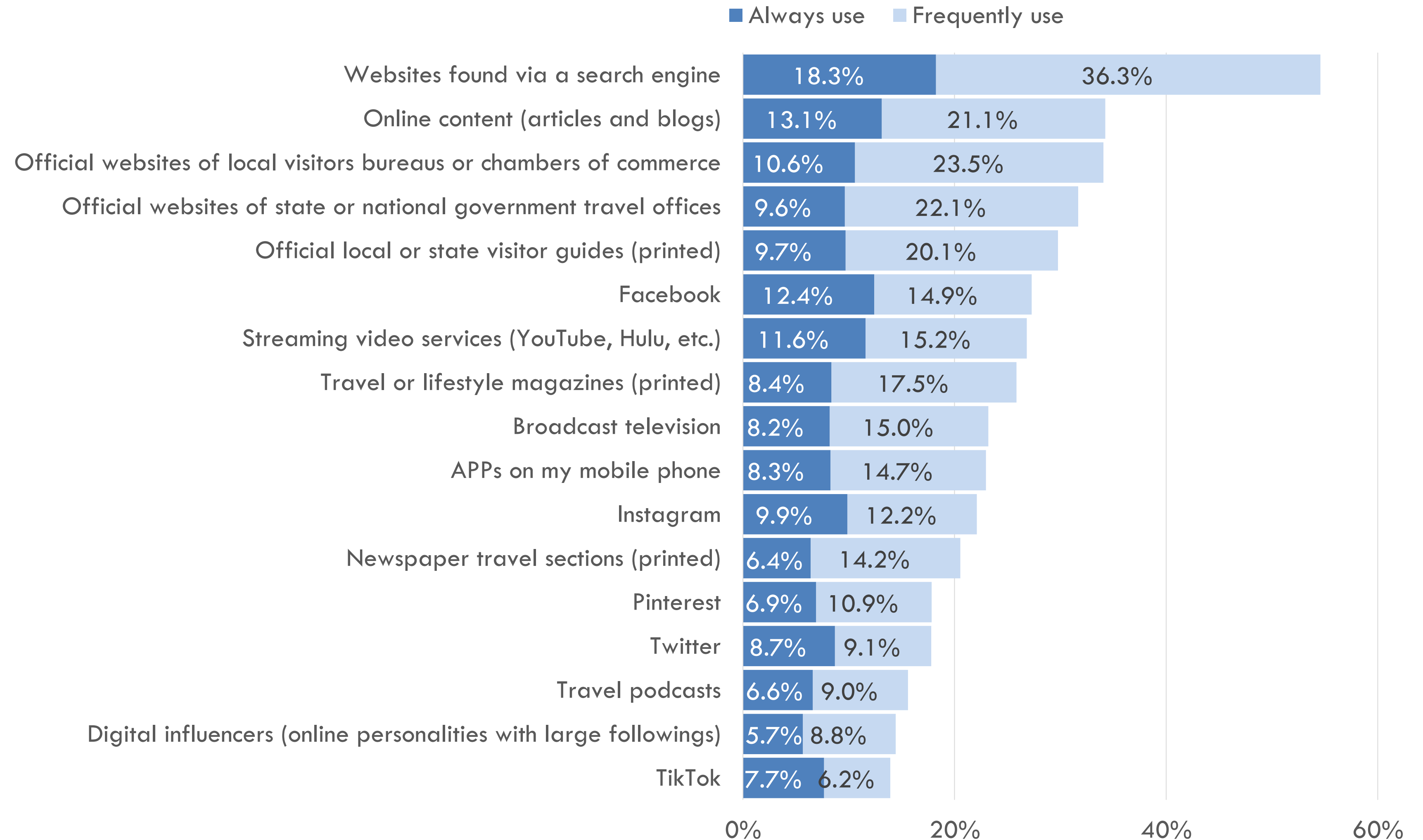


# TRAVEL PLANNING RESOURCES—FREQUENCY OF USE

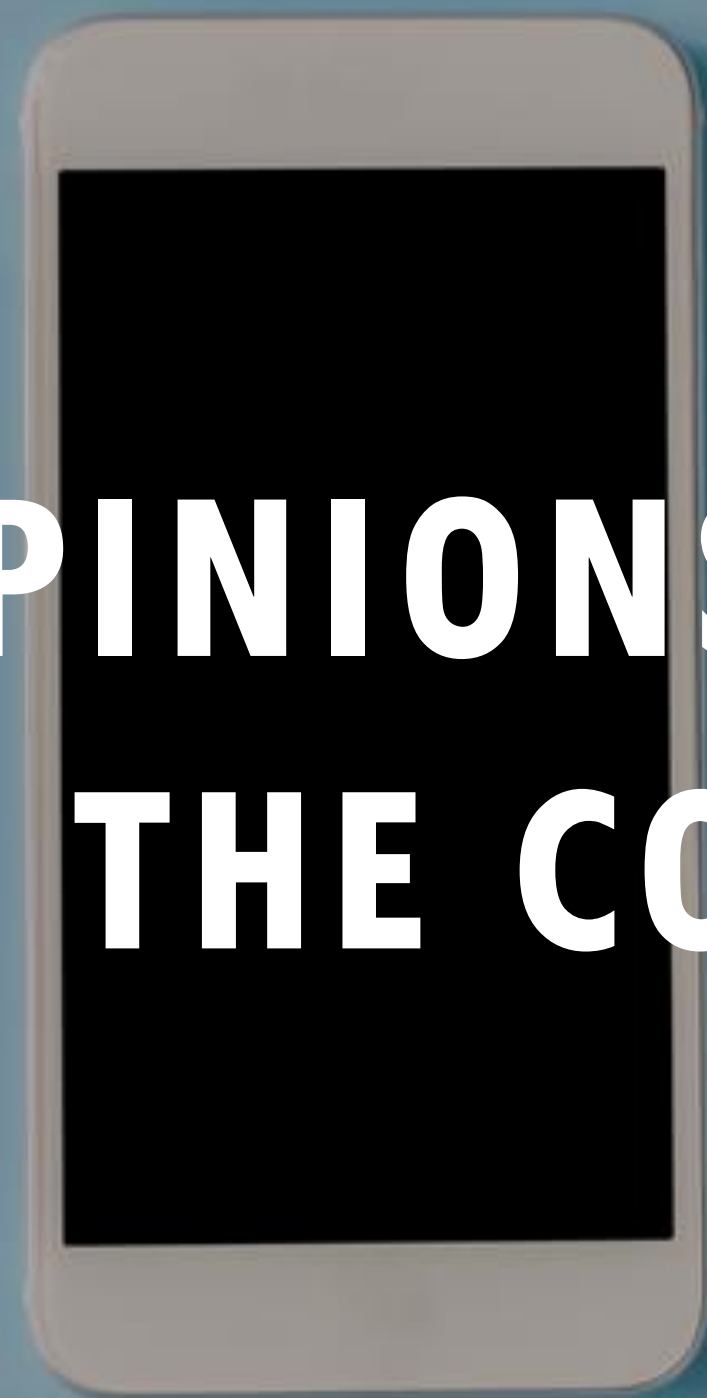
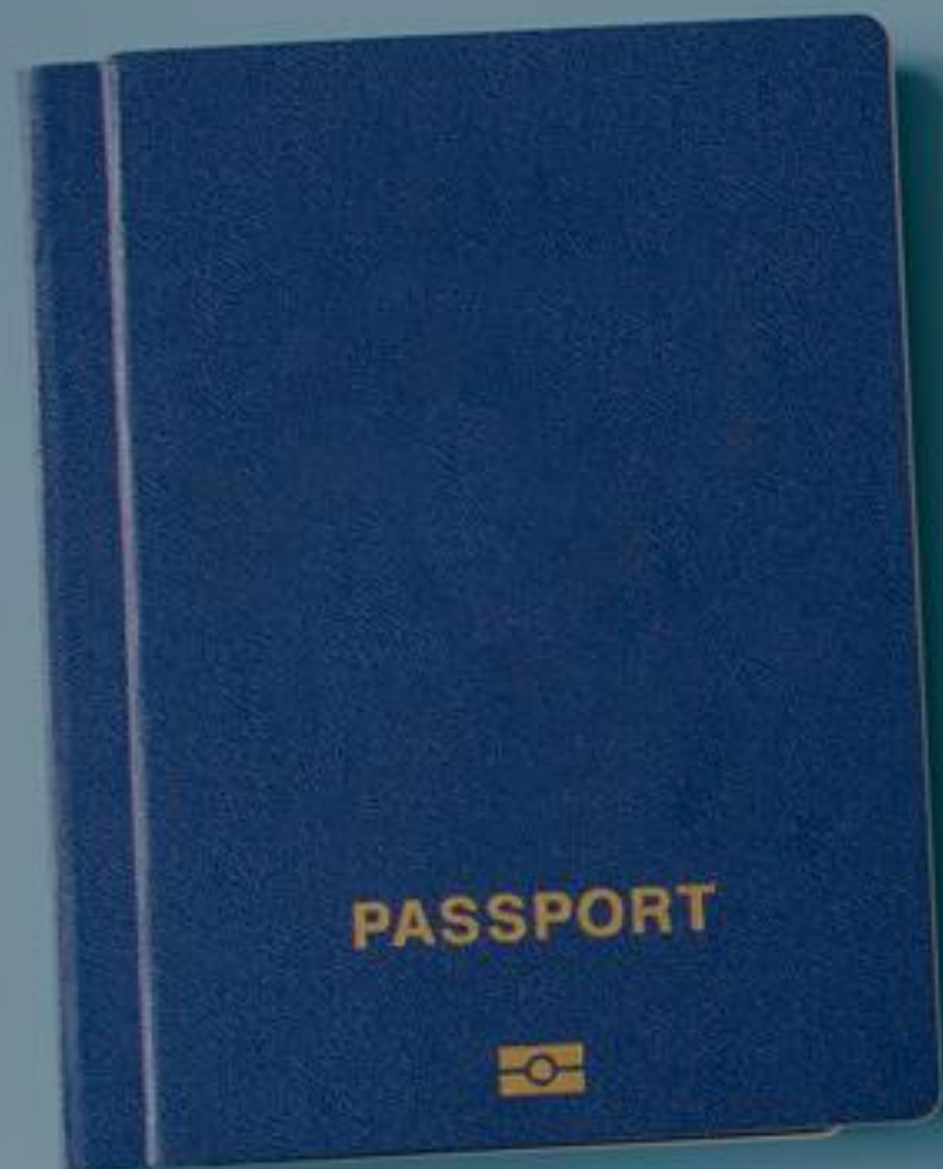
**Question:** In general, when planning your travel which best describes how often you use each of the following? (Select one that best completes the sentence)

I \_\_\_\_\_ this resource in travel planning.

(Base: Waves 44 data. All respondents, 1,225 completed surveys. Data collected January 8-10, 2021)



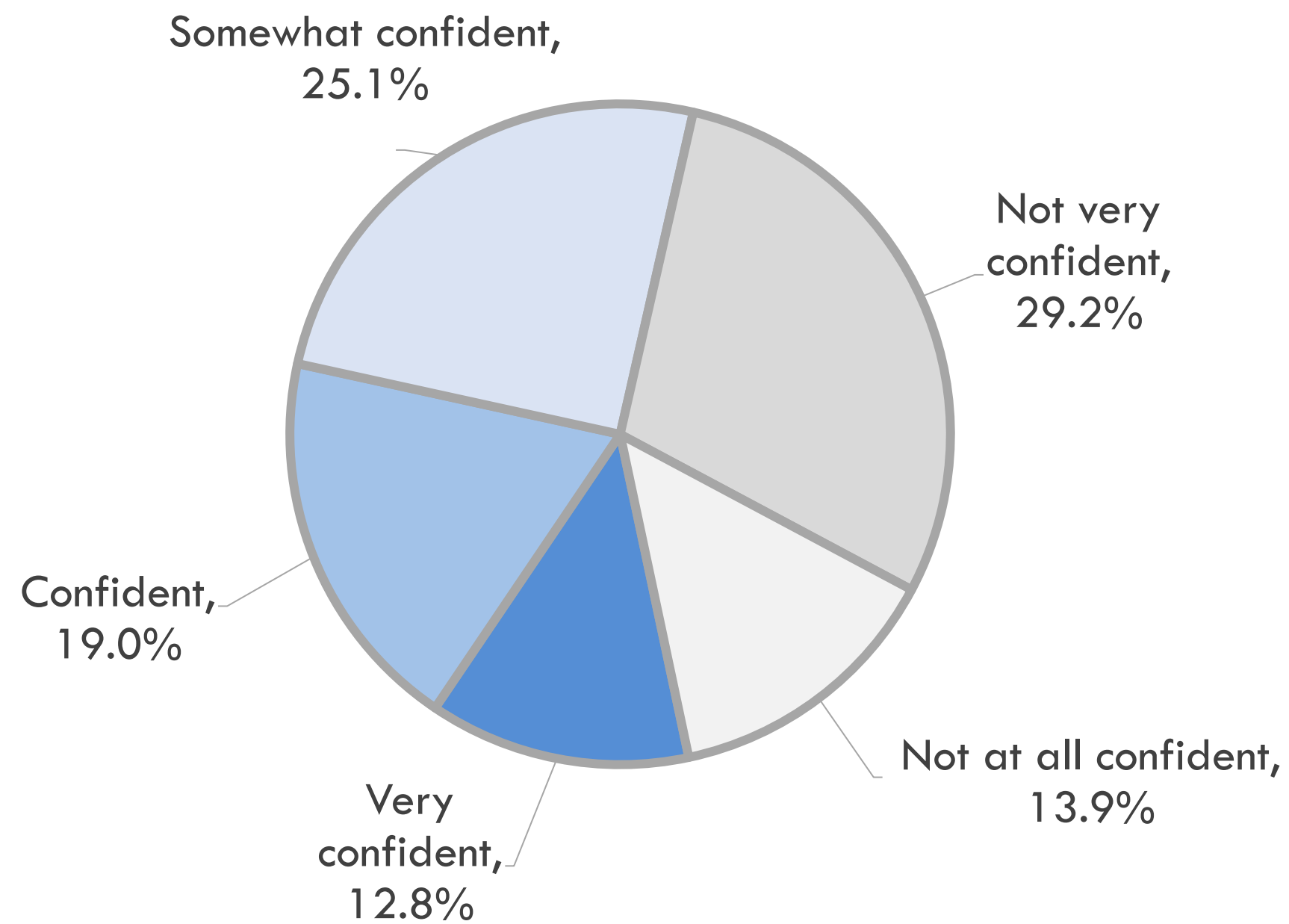
**OPINIONS ON TRAVEL &  
THE CORONAVIRUS**





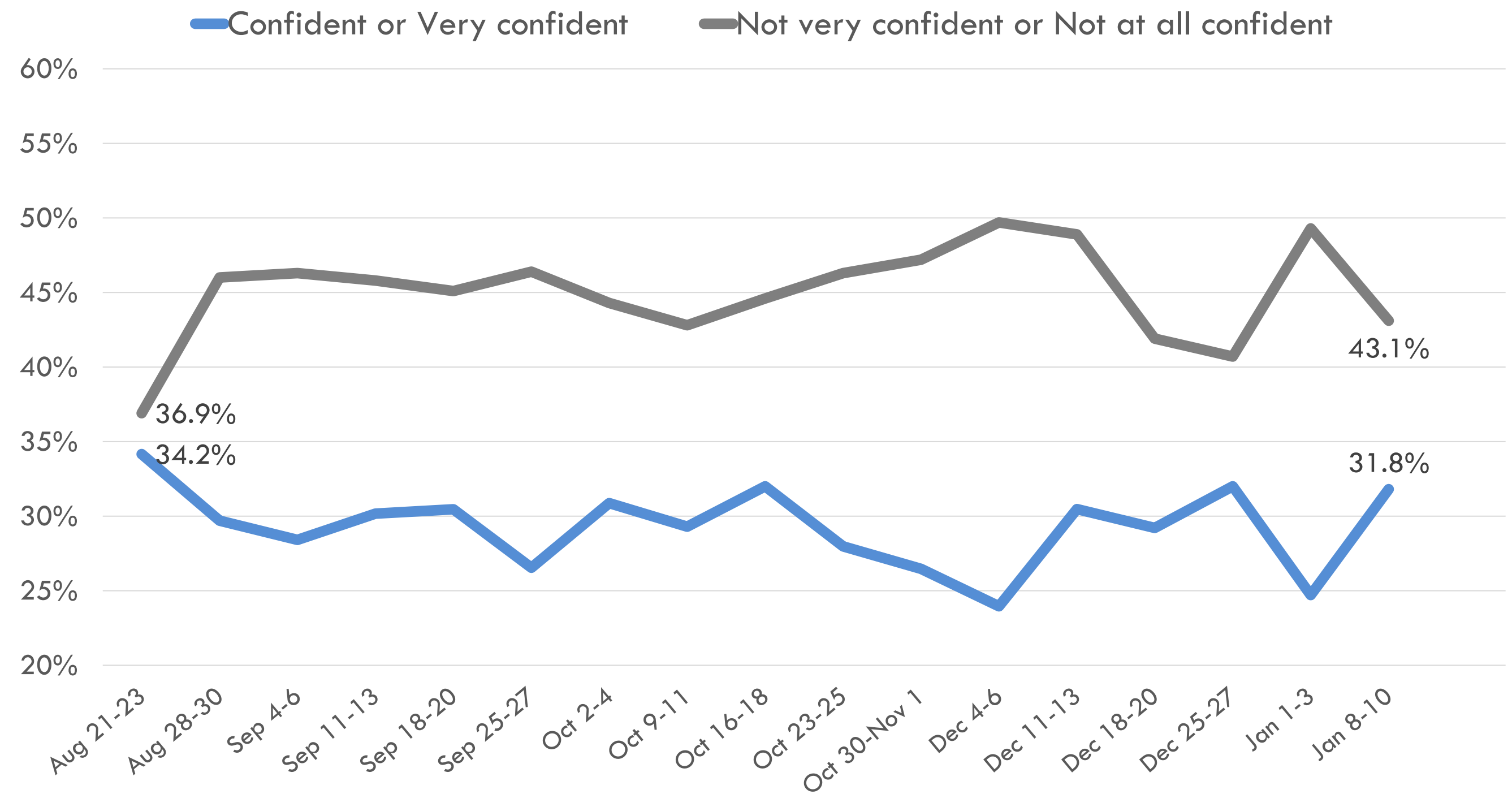
# CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



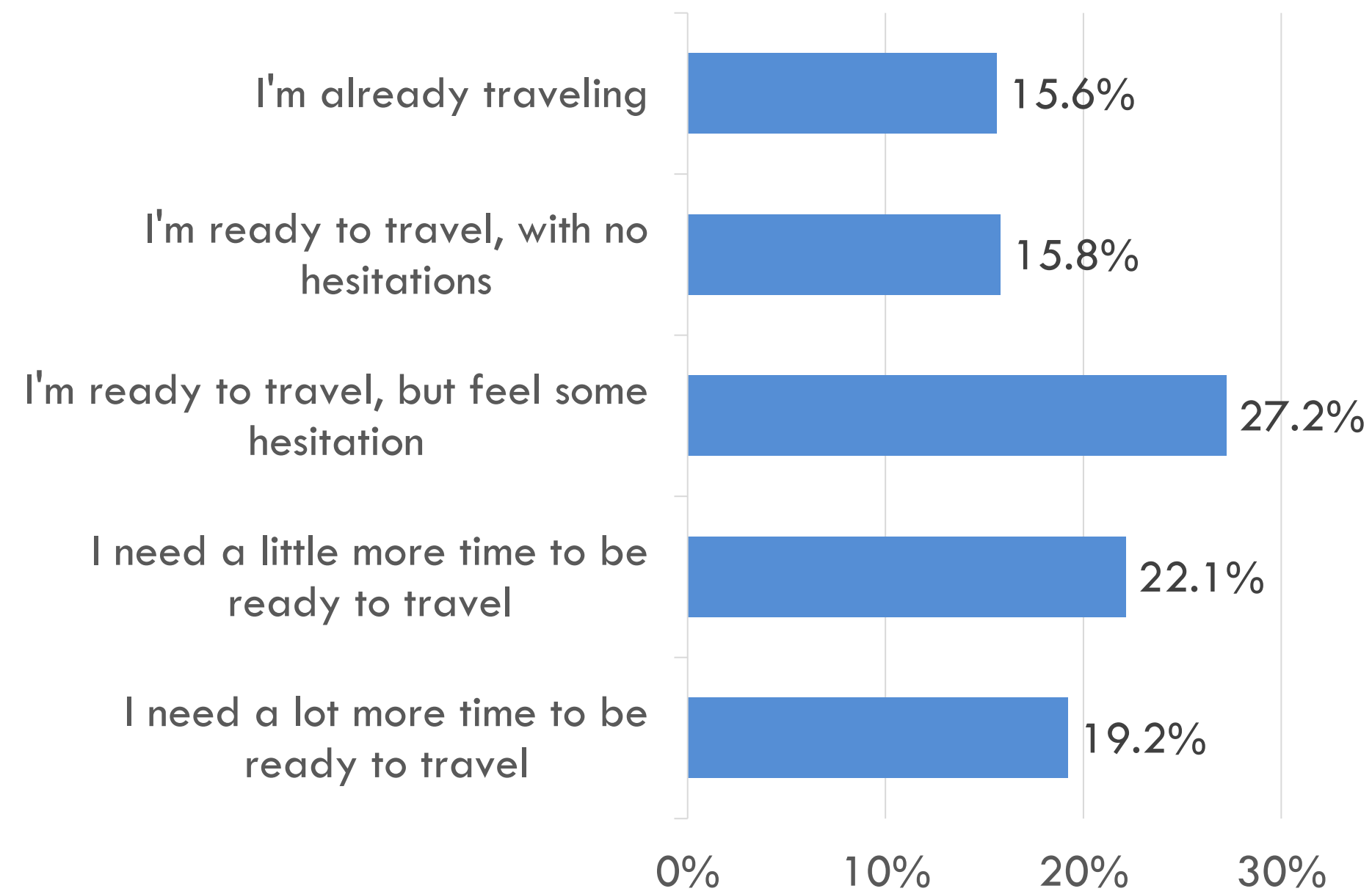
(Base: Wave 24-34 and 39-44 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

## Historical data

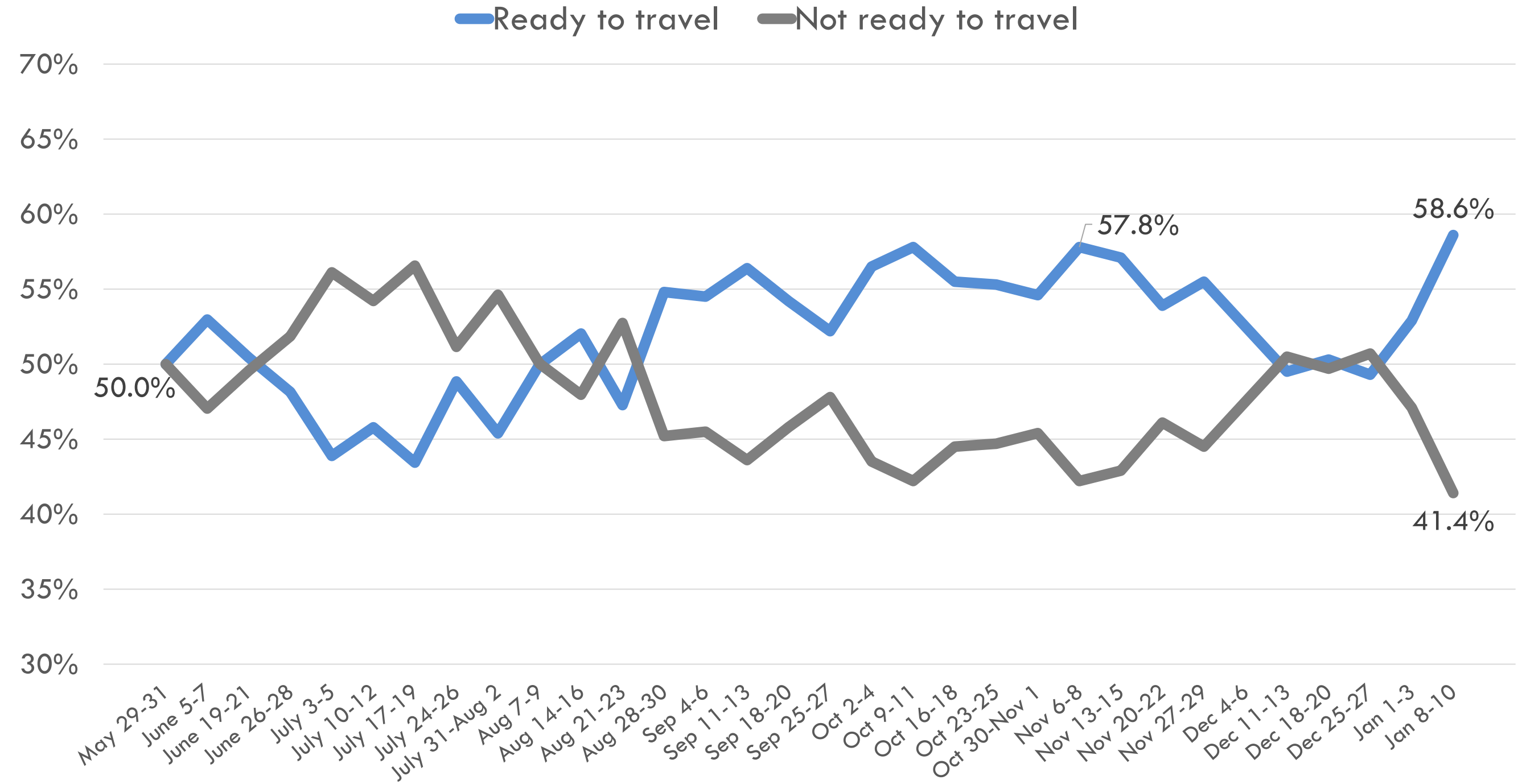


# TRAVEL STATE-OF-MIND

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



## Historical data

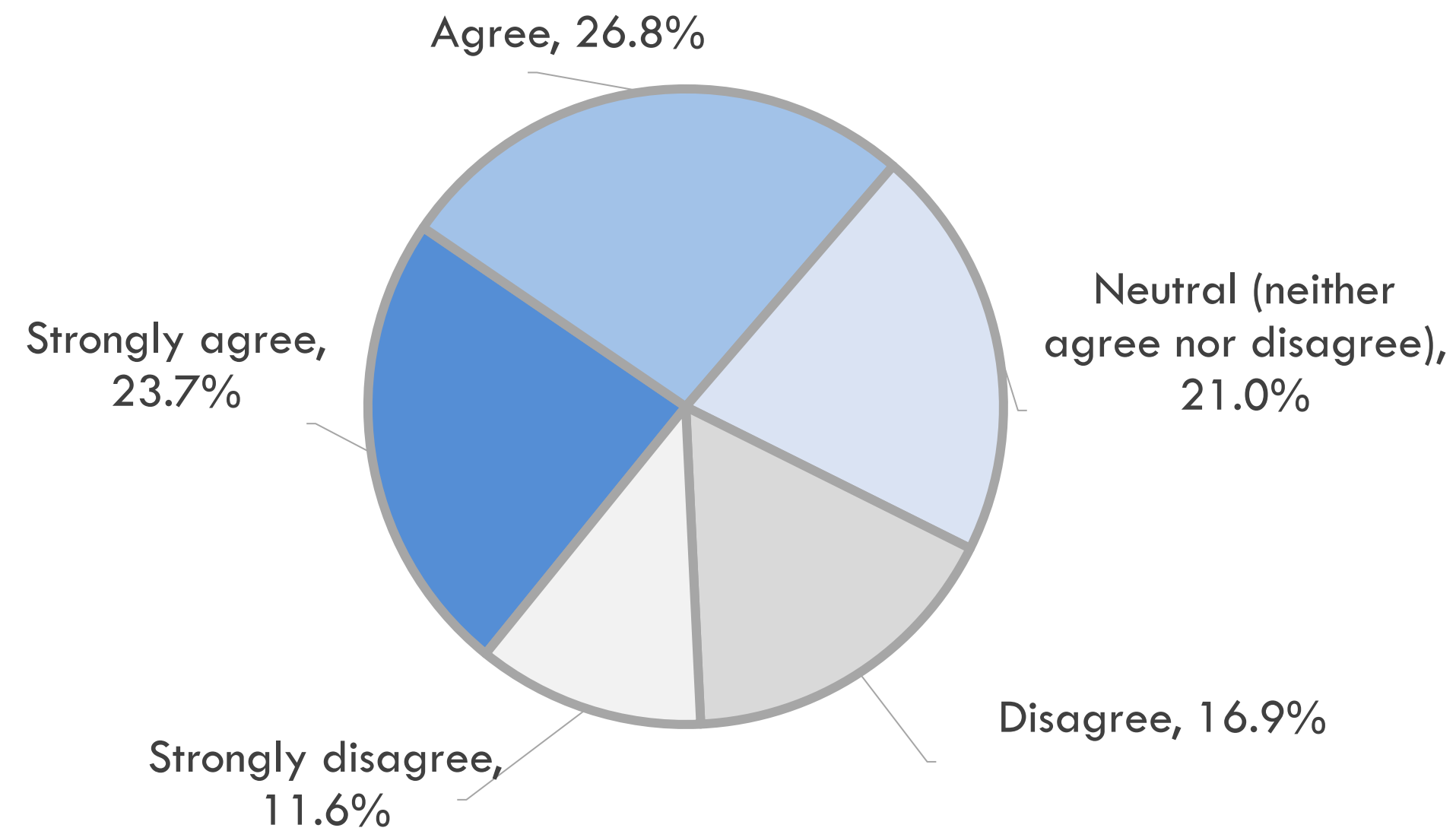


(Base: Waves 12-13 and 15-44. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

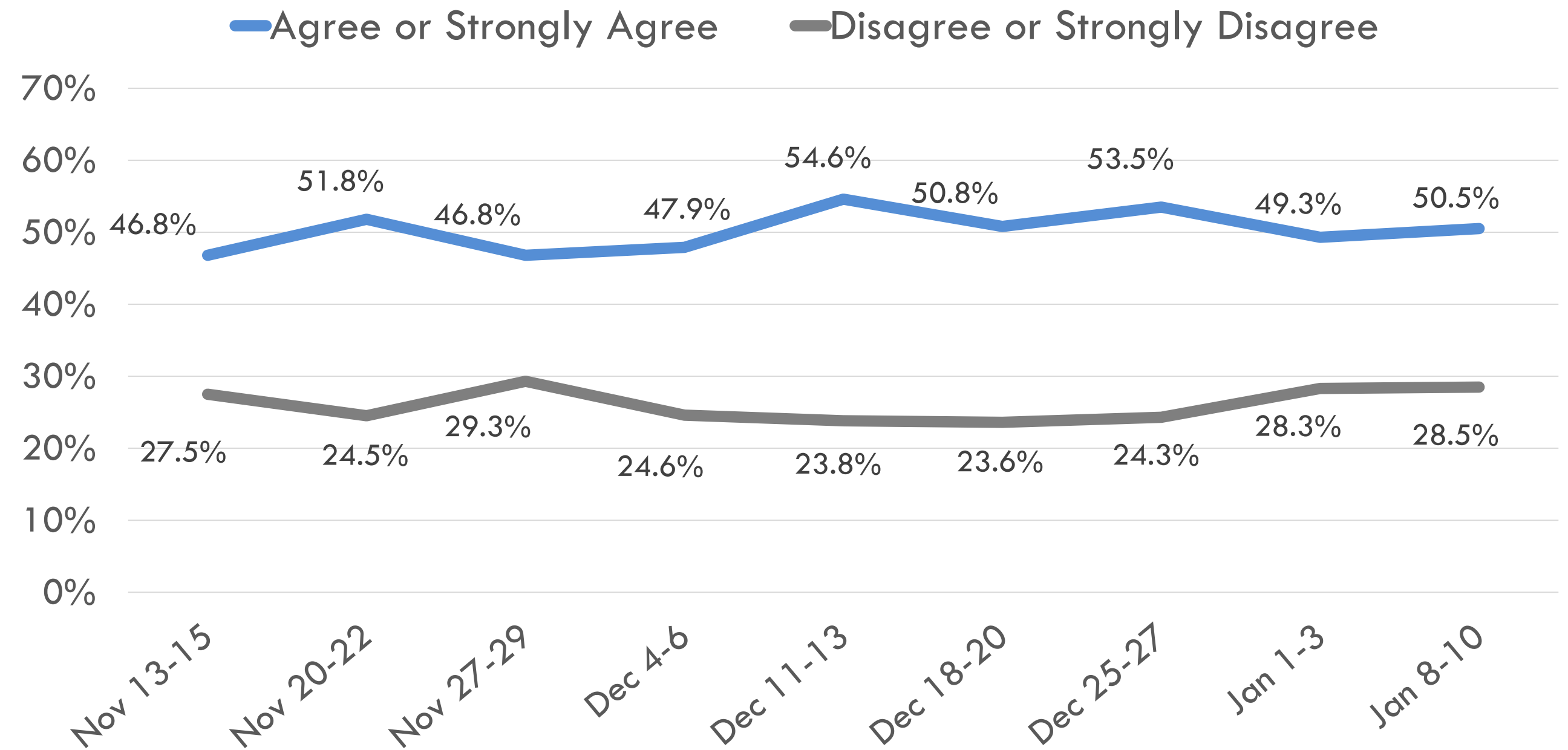
# TRAVEL GUILT

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

**Statement:** I would feel guilty traveling right now.



## Historical data

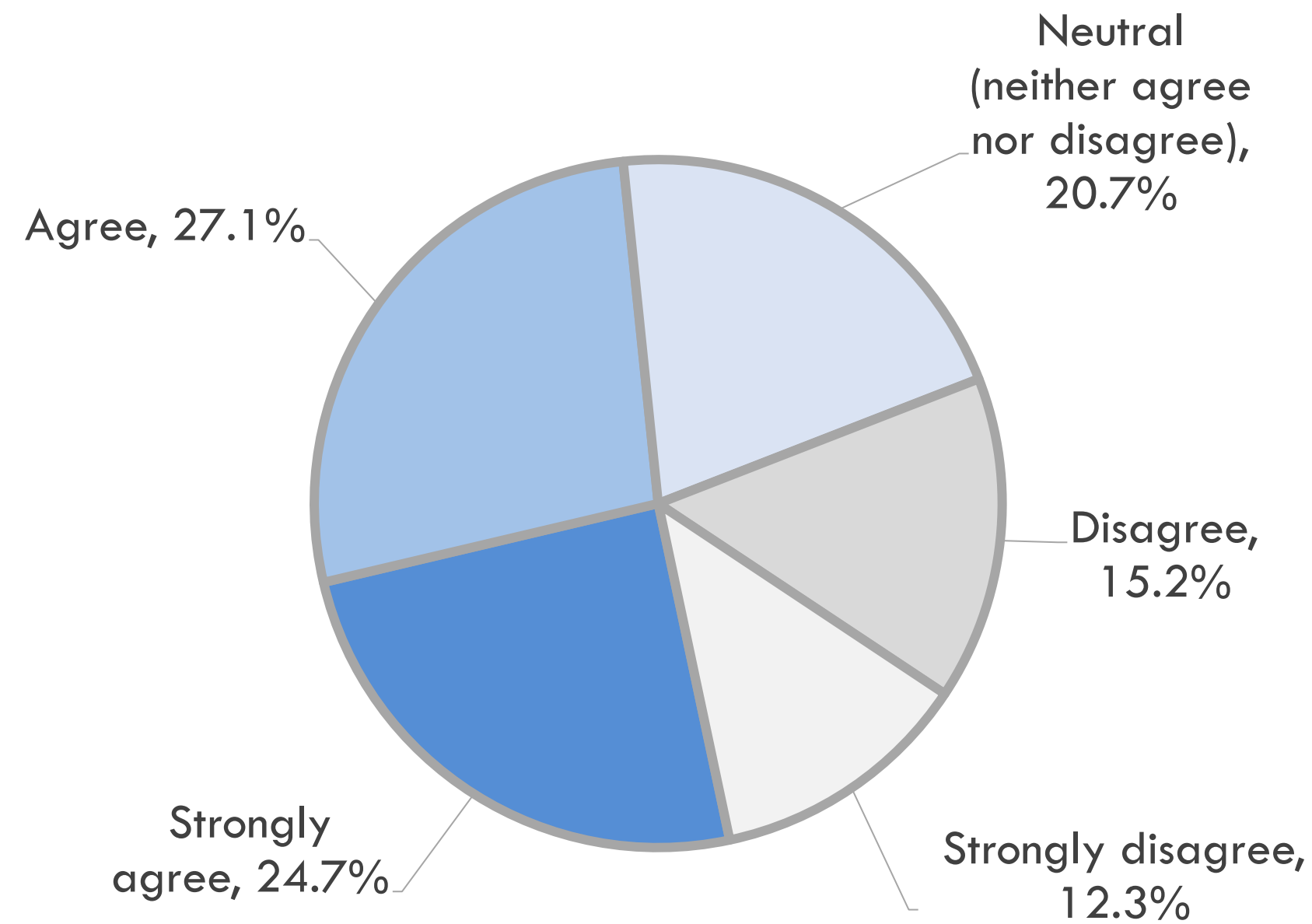


(Base: Waves 36-44 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

# AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

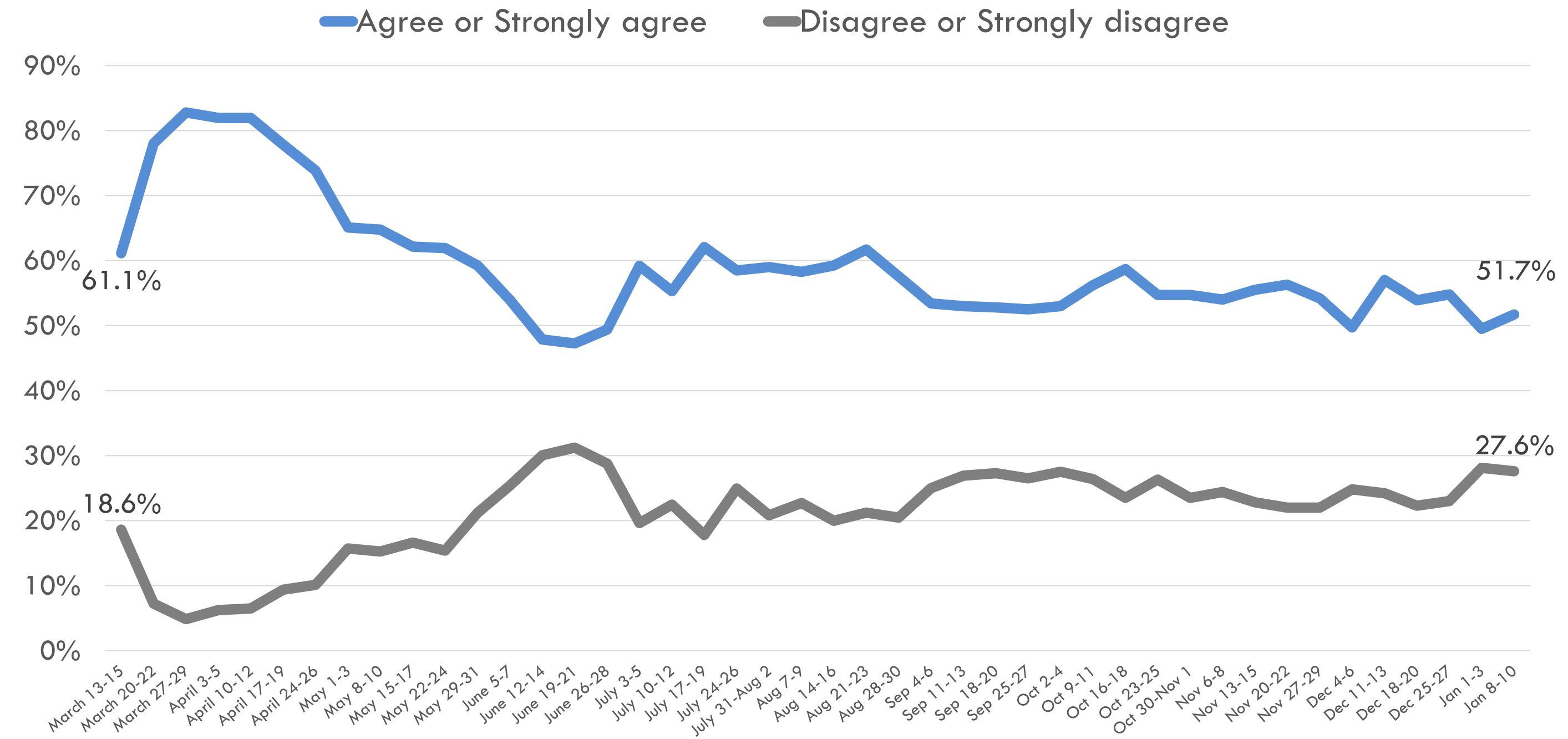
**How much do you agree with the following statement?**

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



(Base: Waves 1-44. 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 and 1,225 completed surveys.)

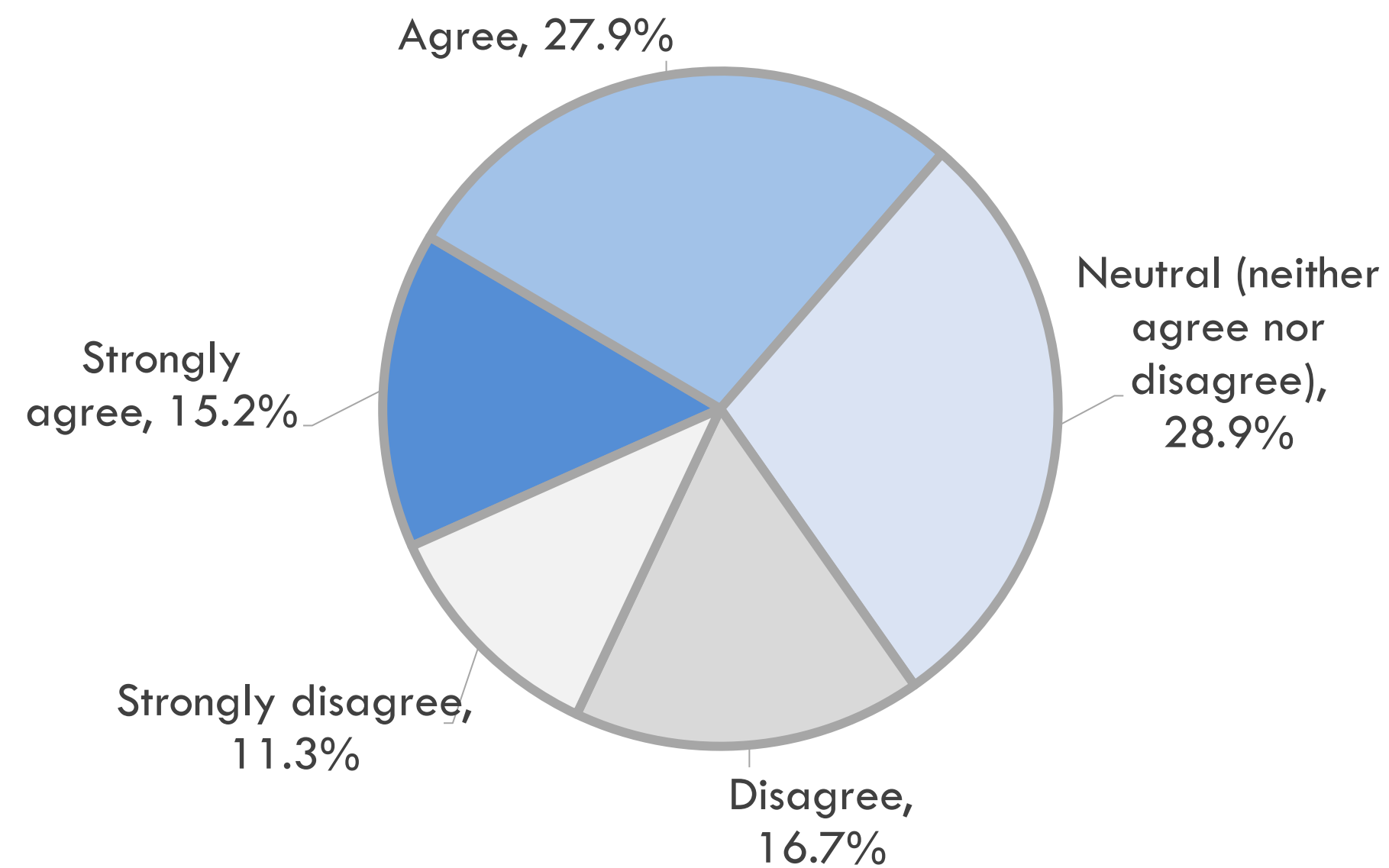
## Historical data



# DISCOUNTS AND PRICE CUTS

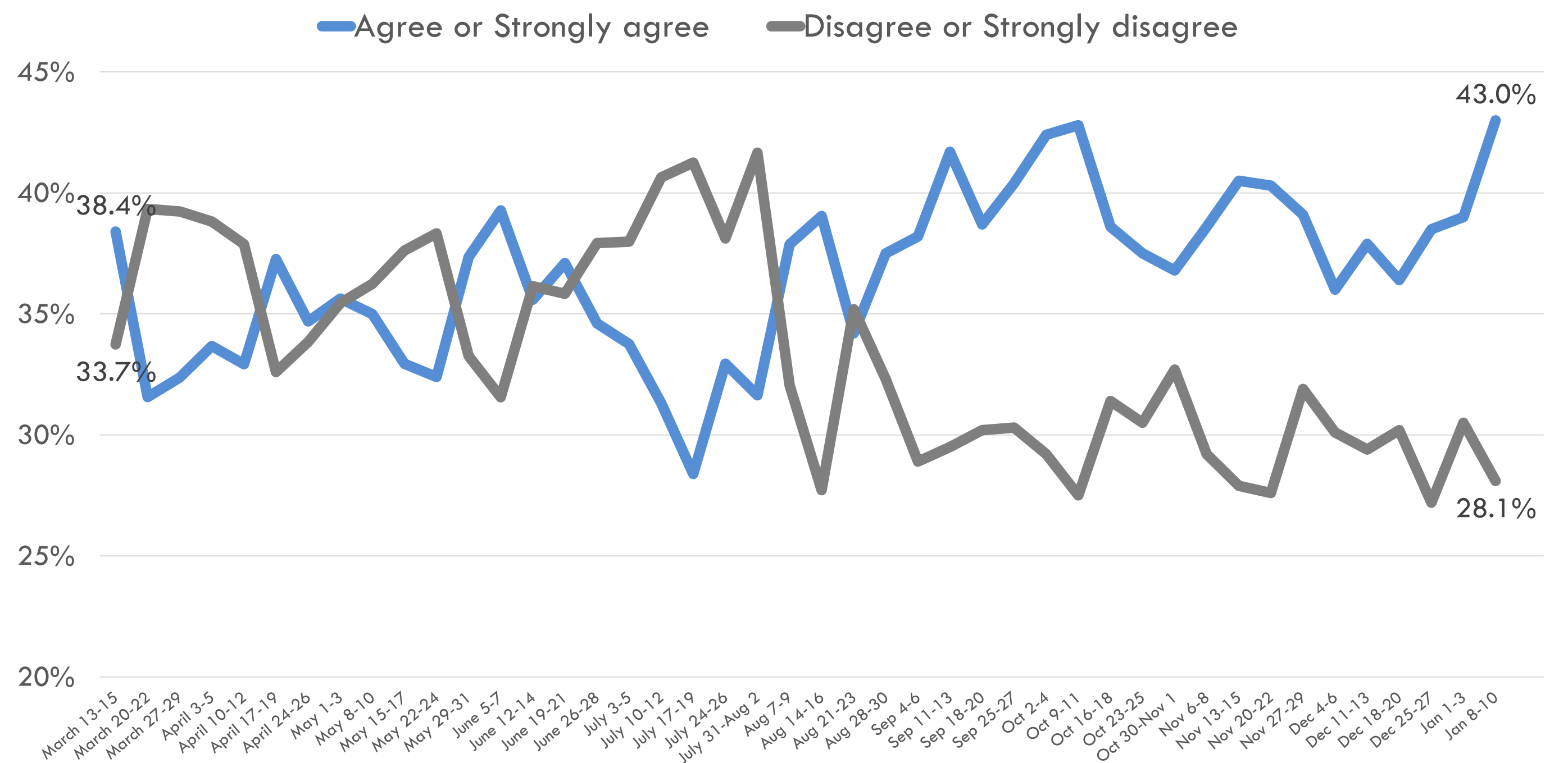
**How much do you agree with the following statement?**

**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 1-44. 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 and 1,225 completed surveys.)

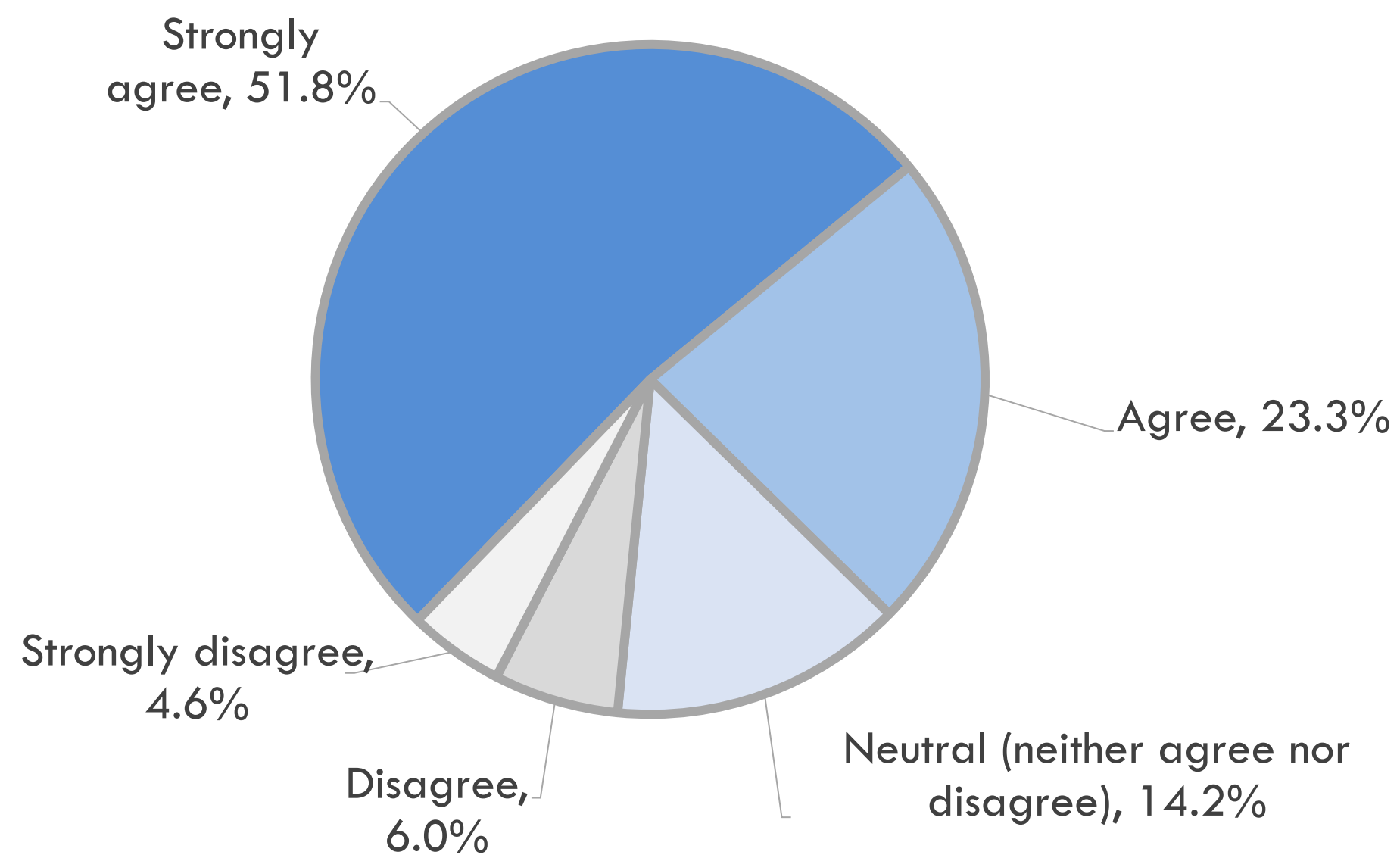
## Historical data



# AVOIDING INTERNATIONAL TRAVEL

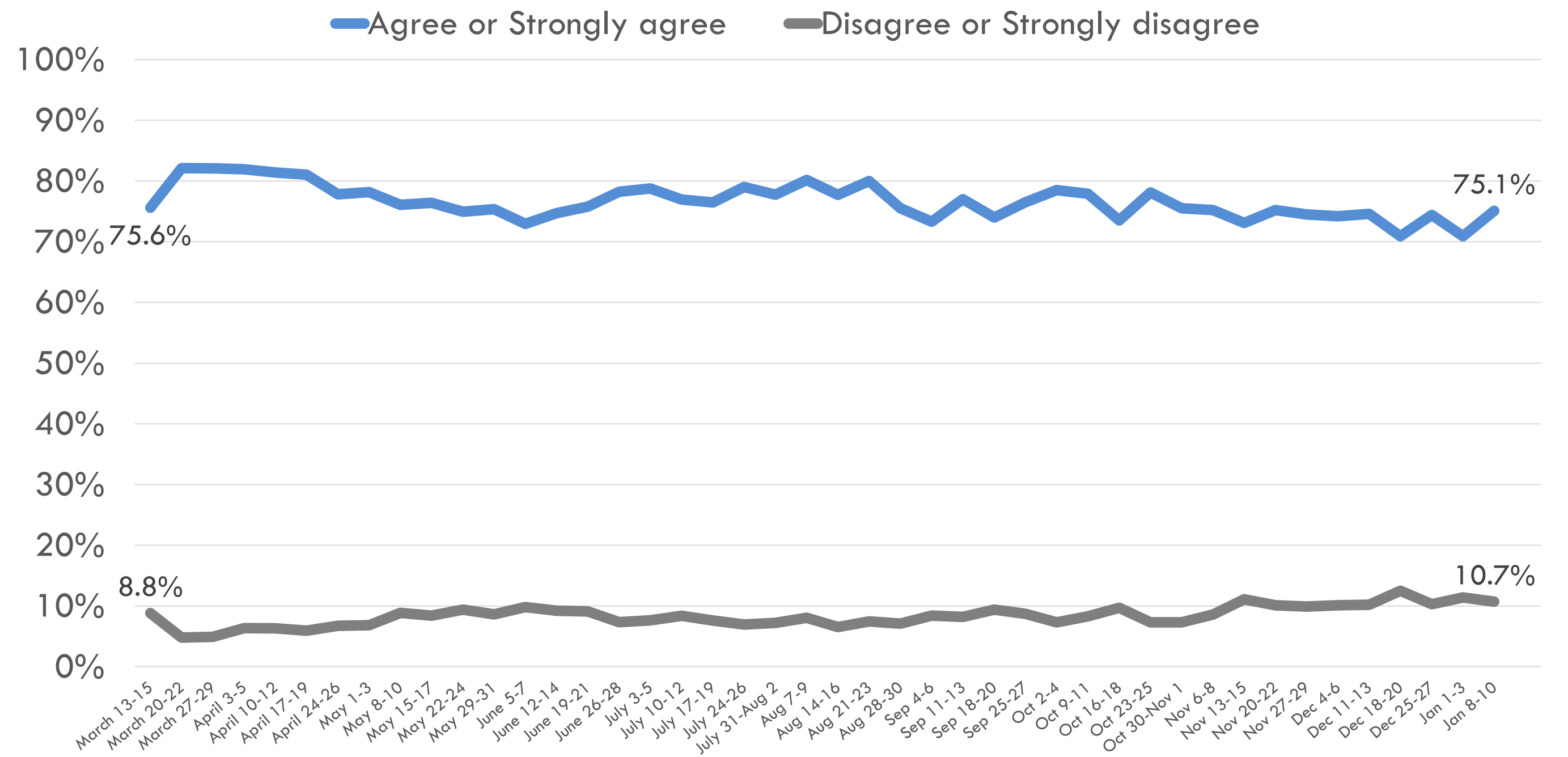
**How much do you agree with the following statement?**

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



(Base: Waves 1-44. 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 and 1,225 completed surveys.)

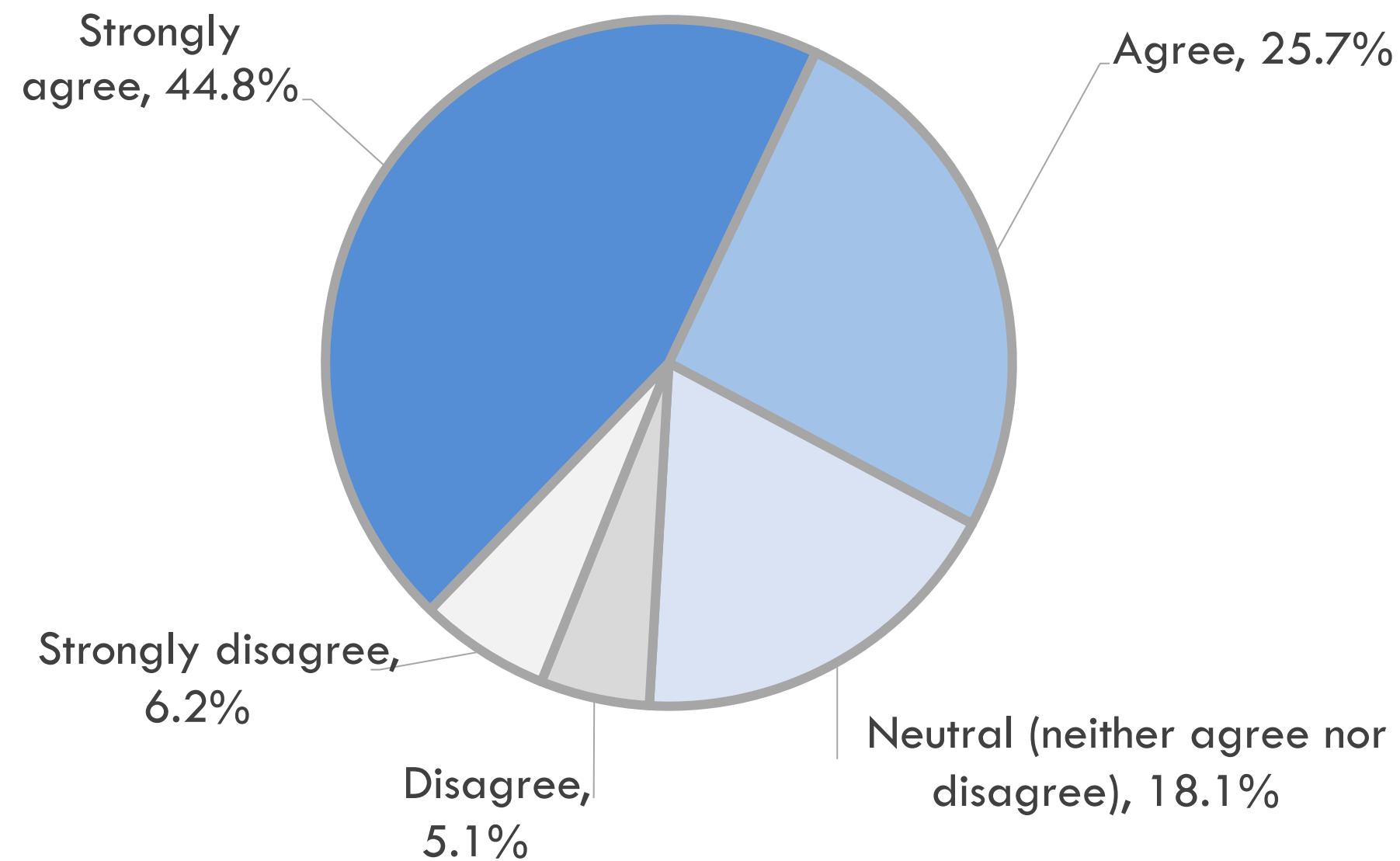
## Historical data



# AVOIDING CONVENTIONS & CONFERENCES

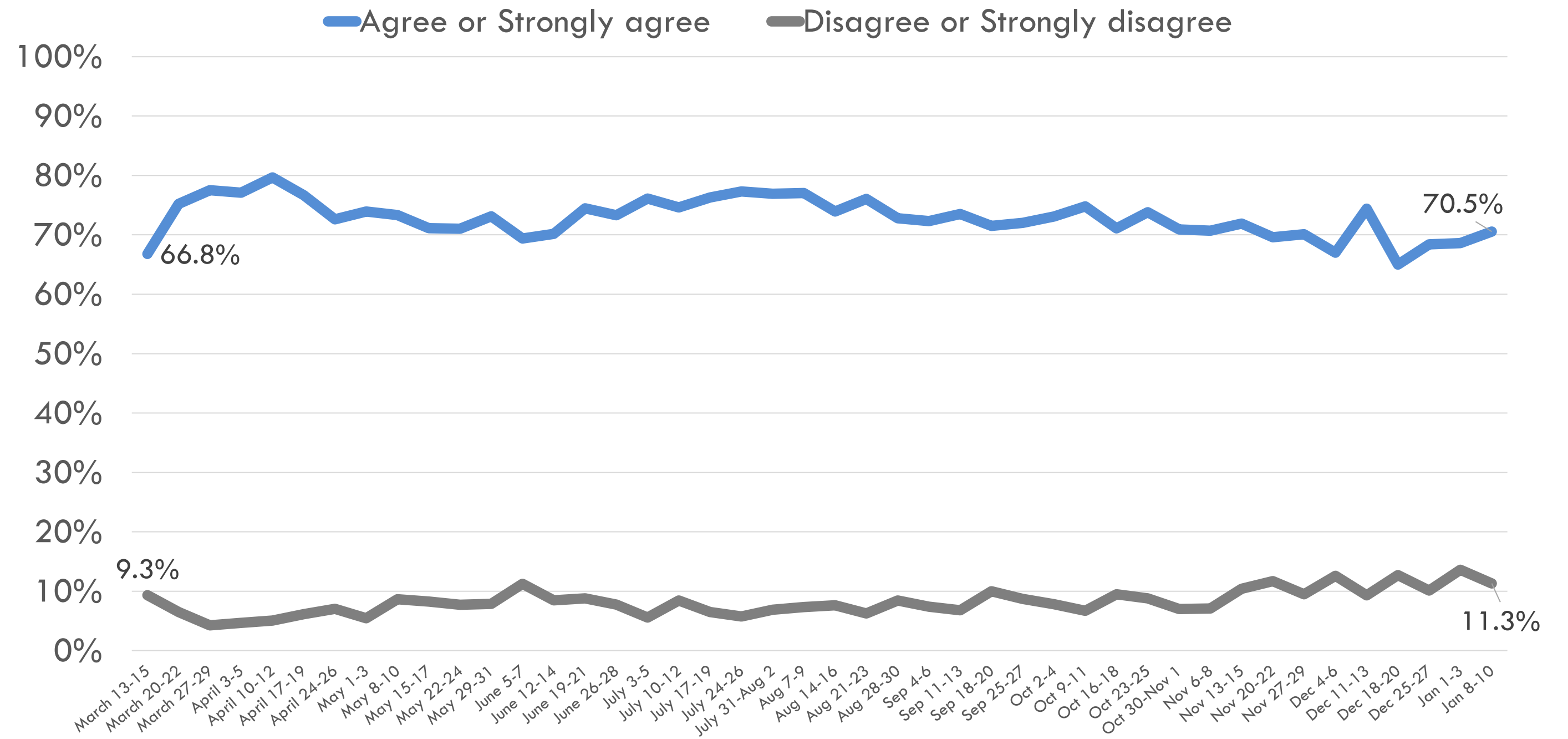
**How much do you agree with the following statement?**

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



(Base: Waves 1-44. 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 and 1,225 completed surveys.)

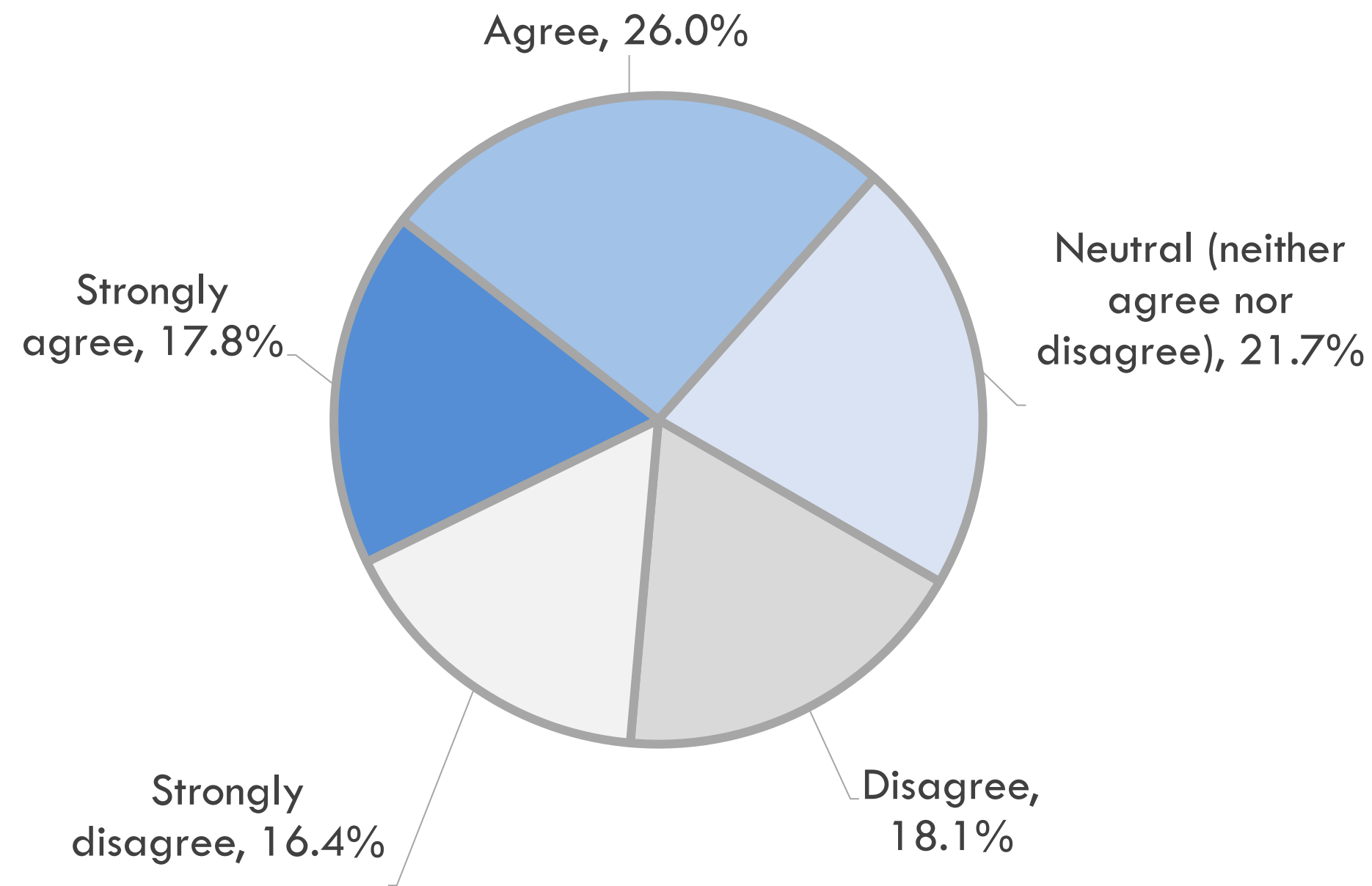
## Historical data



# COMFORT ENJOYING HOME COMMUNITY

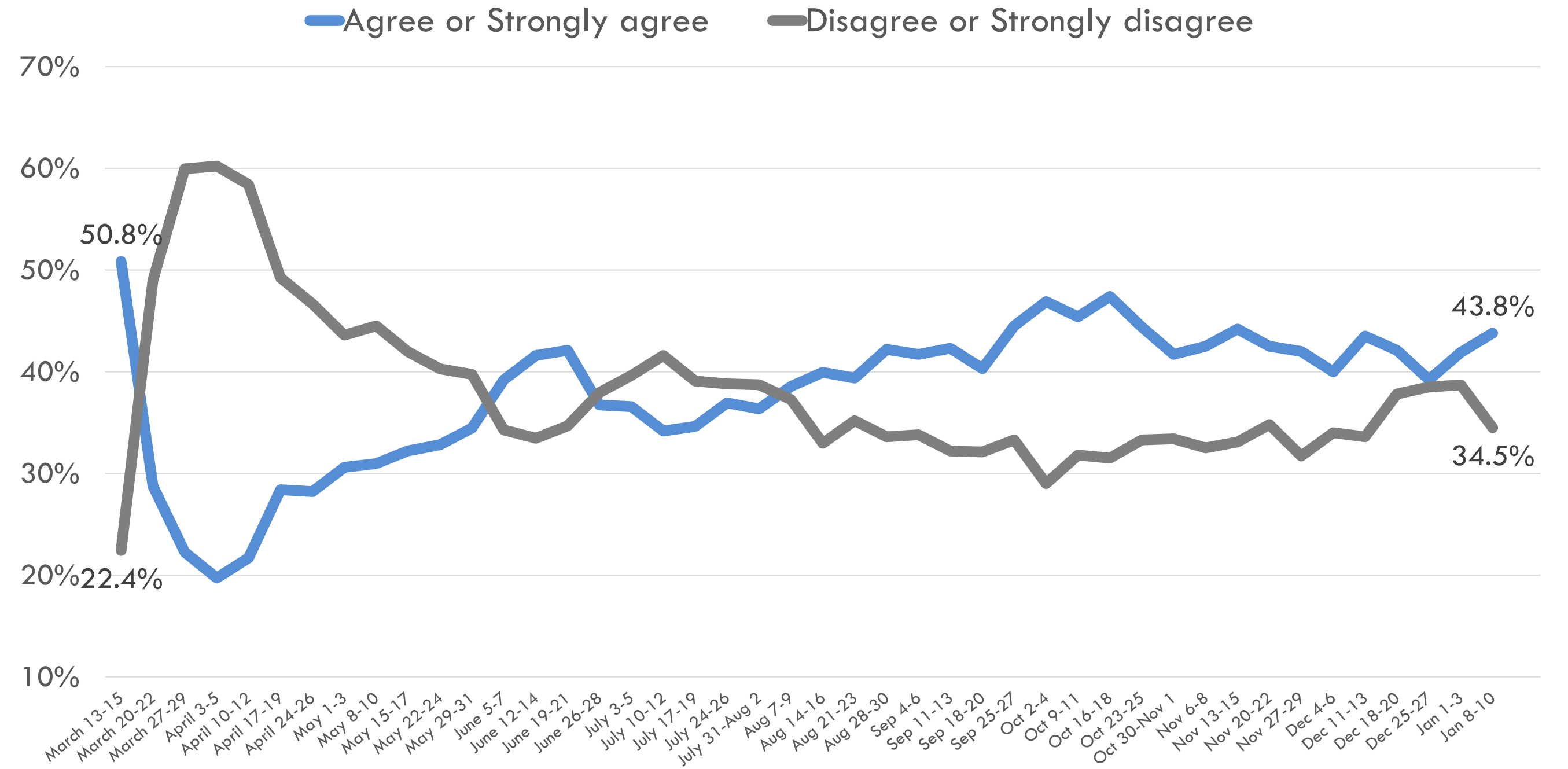
**How much do you agree with the following statement?**

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



(Base: Waves 1-44. 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 and 1,225 completed surveys.)

## Historical data

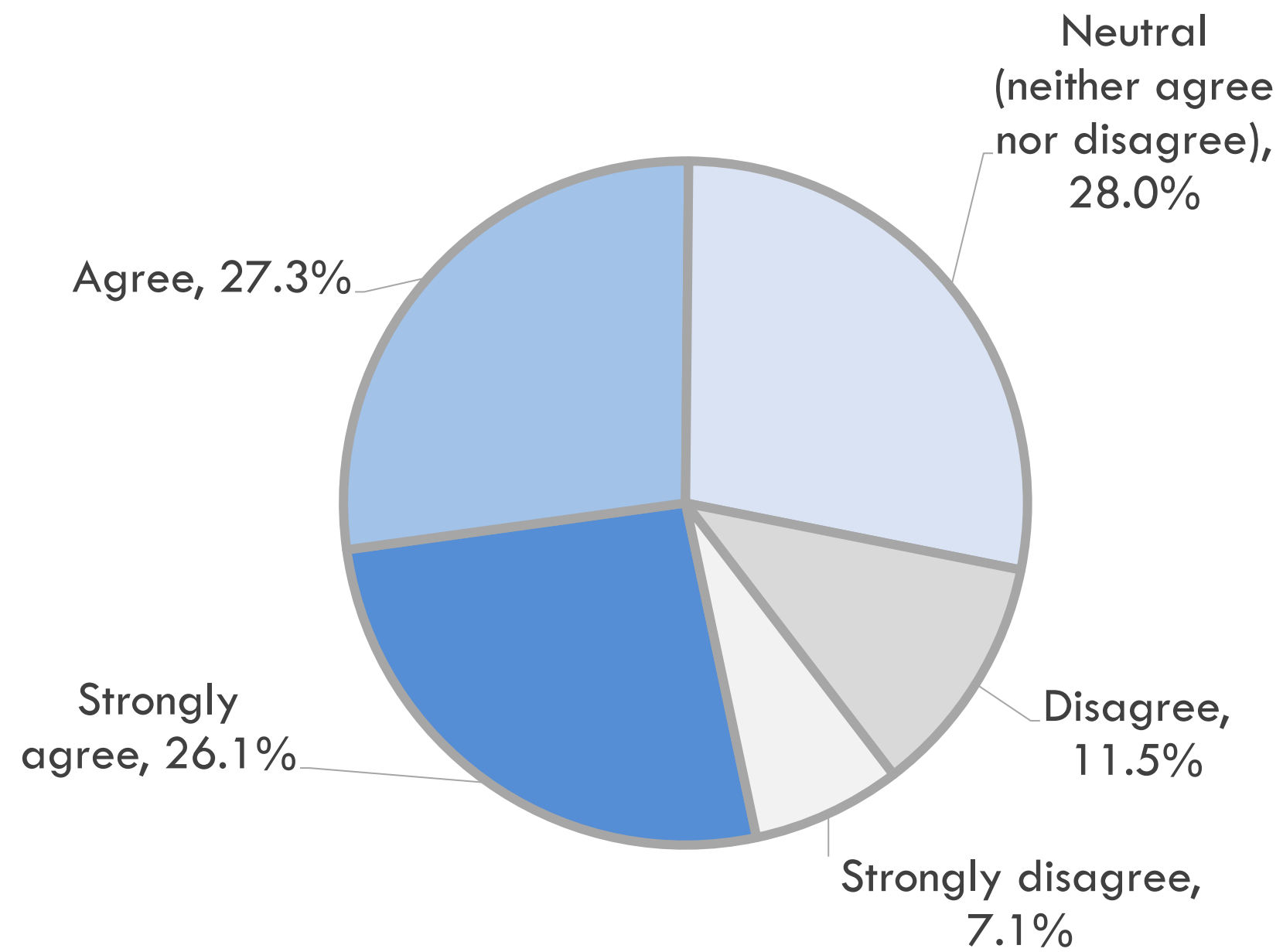




# TRAVELERS IN COMMUNITY ARE UNWANTED

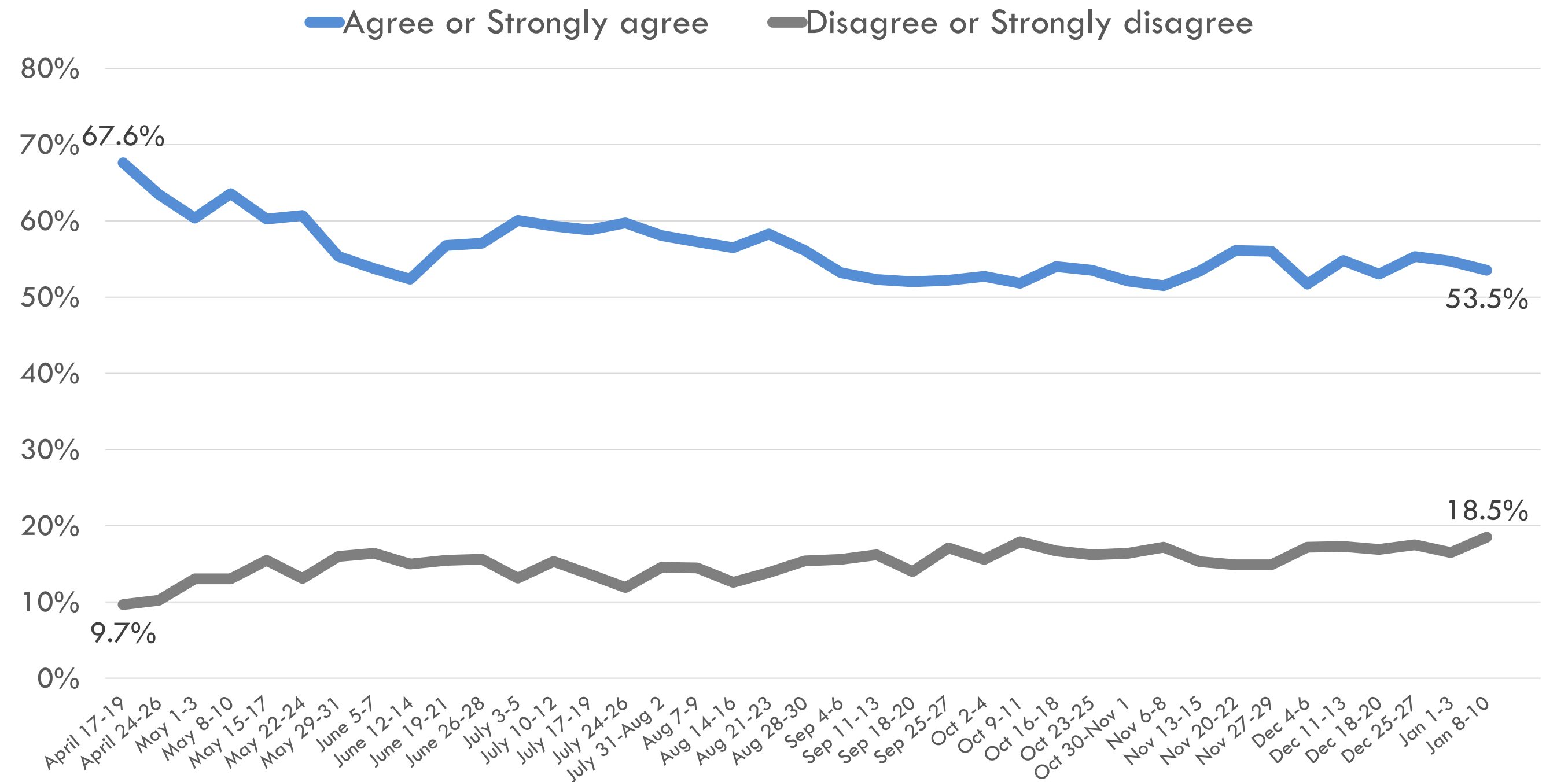
**How much do you agree with the following statement?**

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



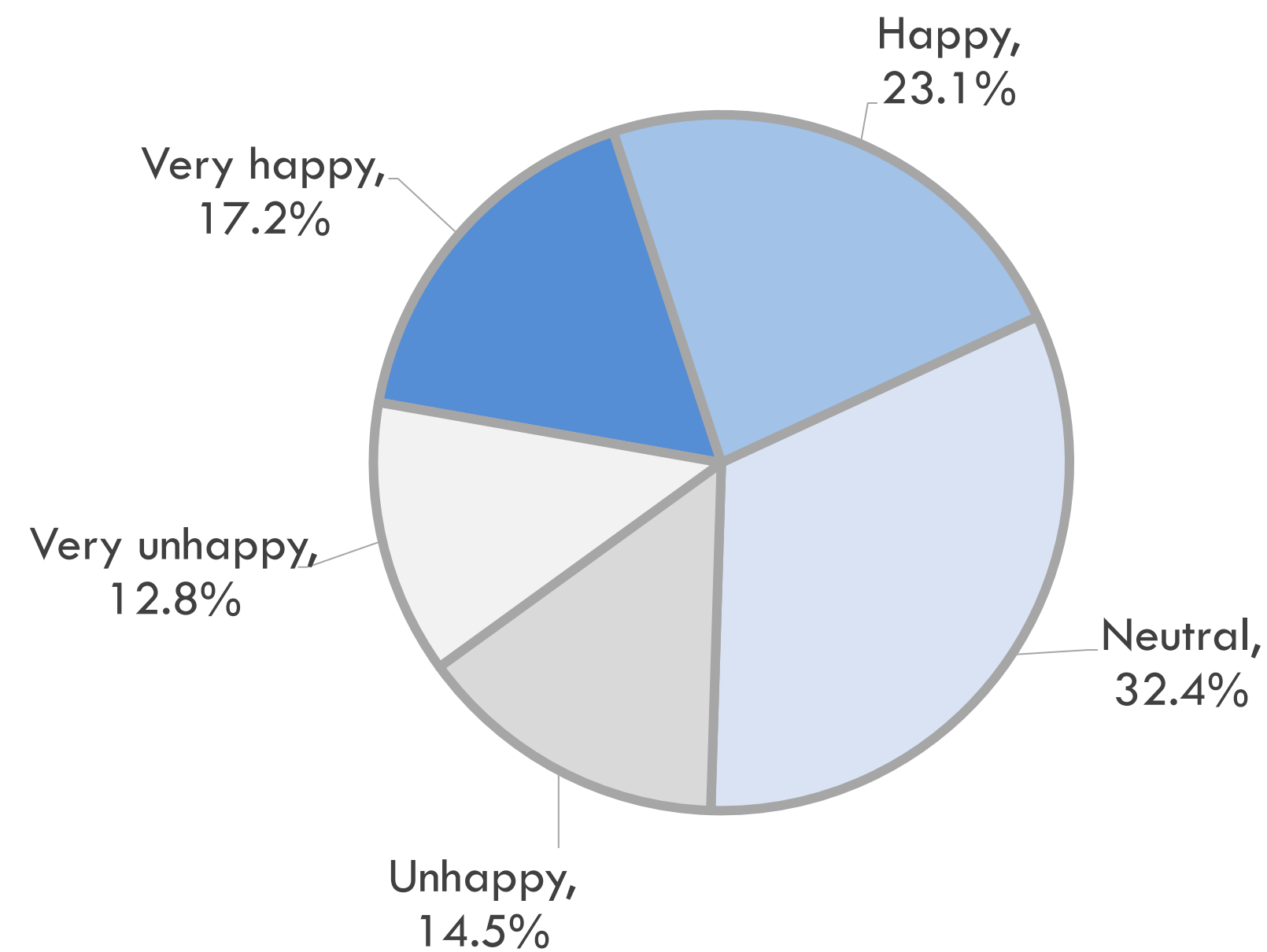
(Base: Waves 6-44. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

## Historical data



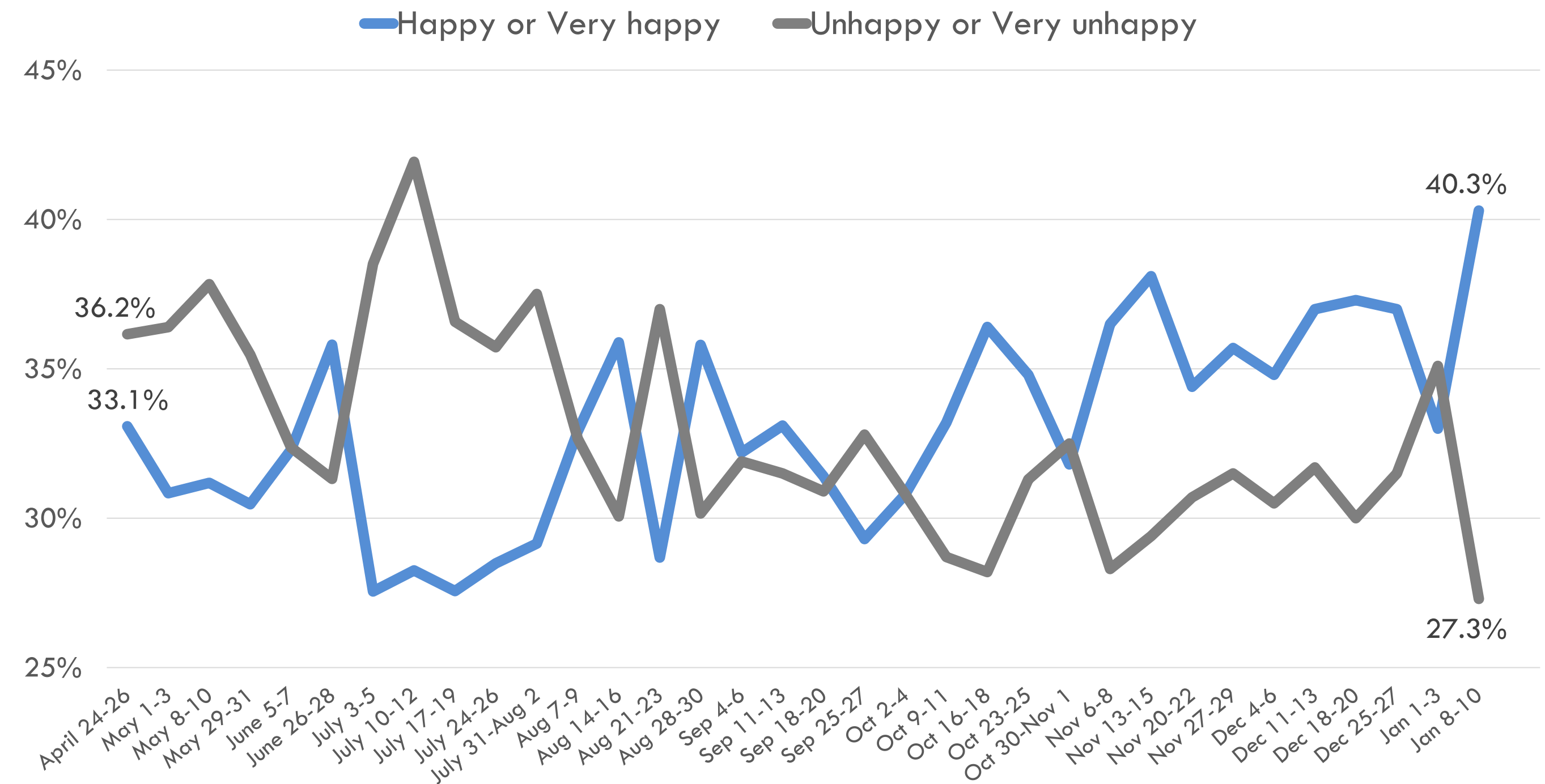
# FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

**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 16-44. 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 and 1,225 completed surveys.)

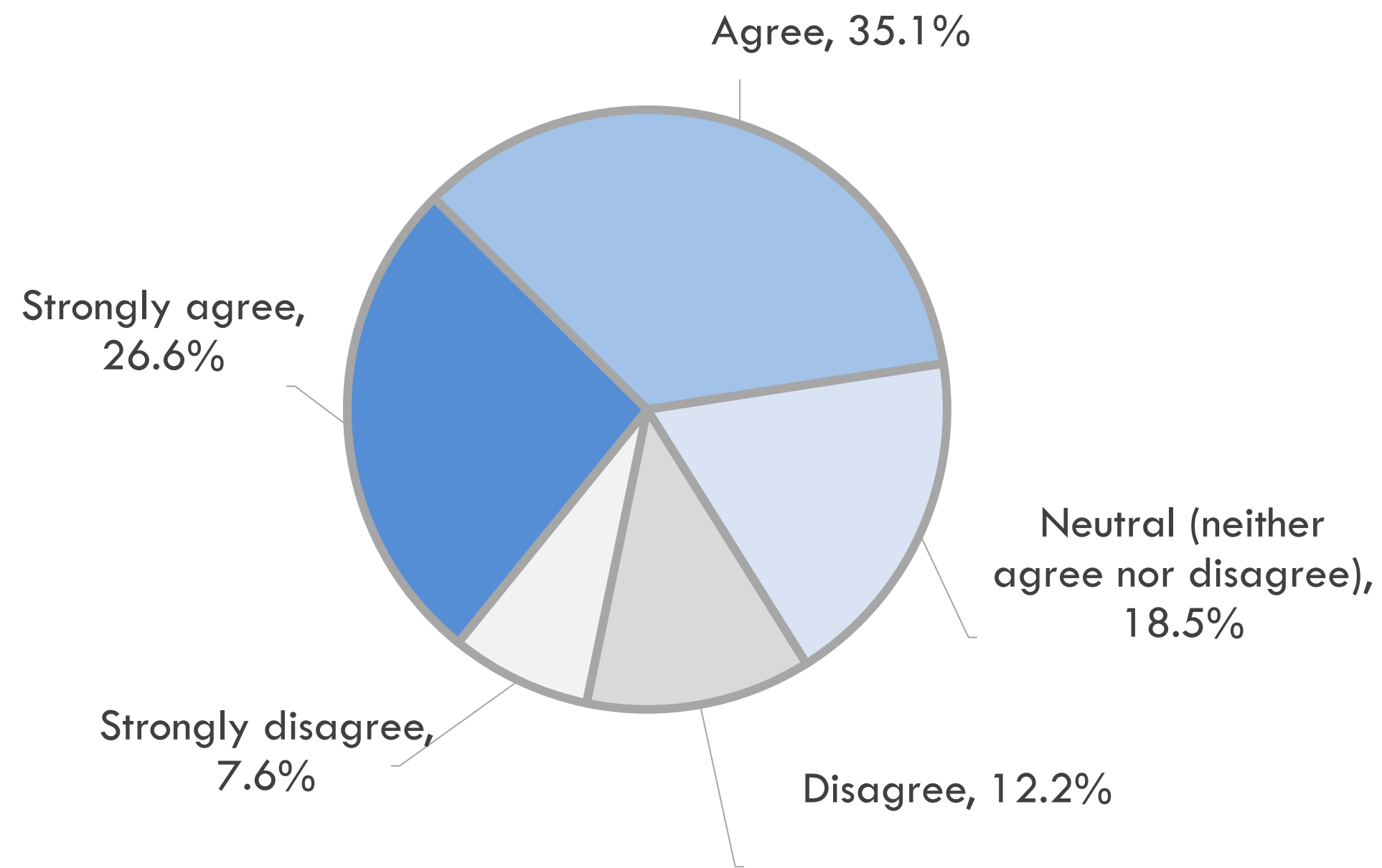
## Historical data



# INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

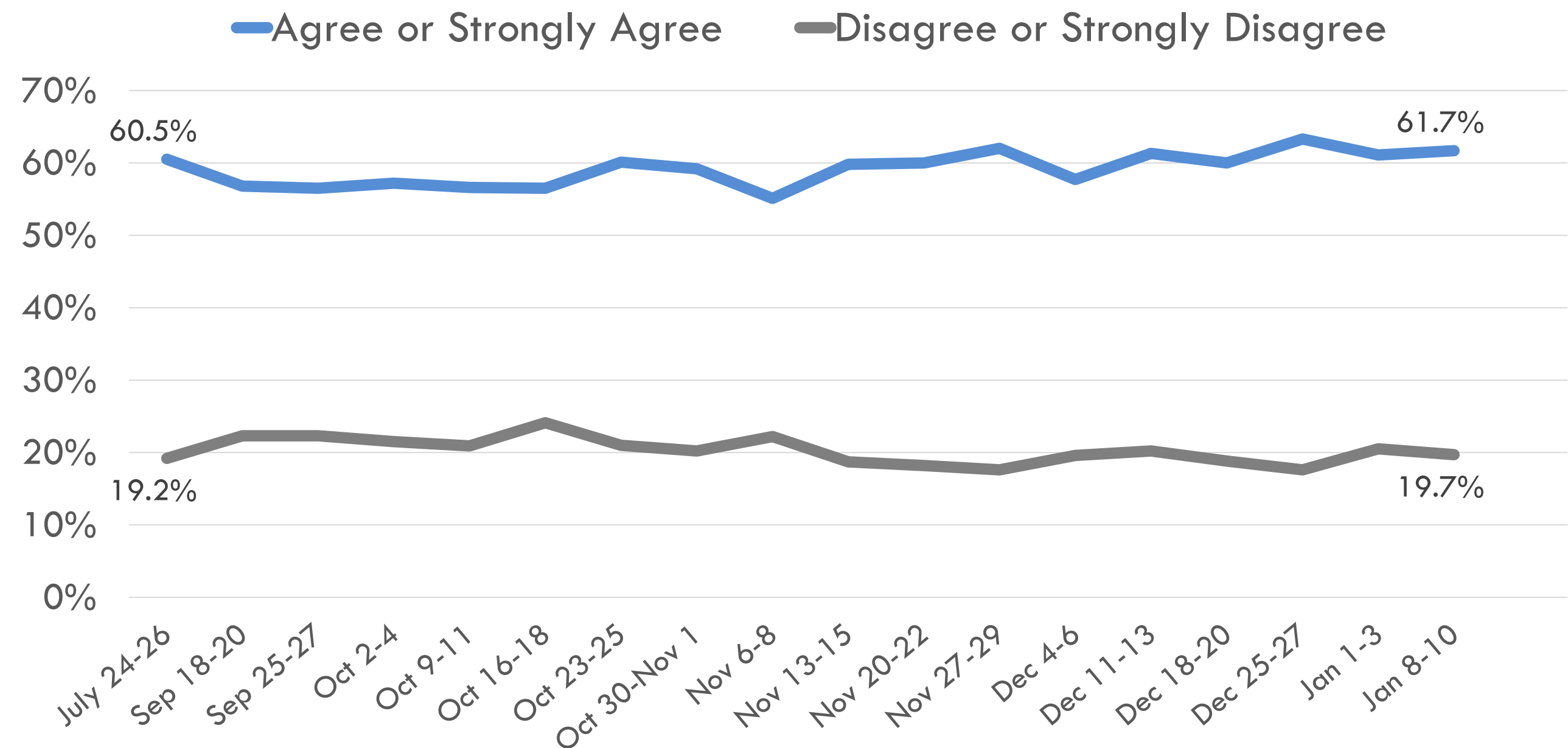
**How much do you agree with the following statement?**

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



(Base: Waves 20, 28-44 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

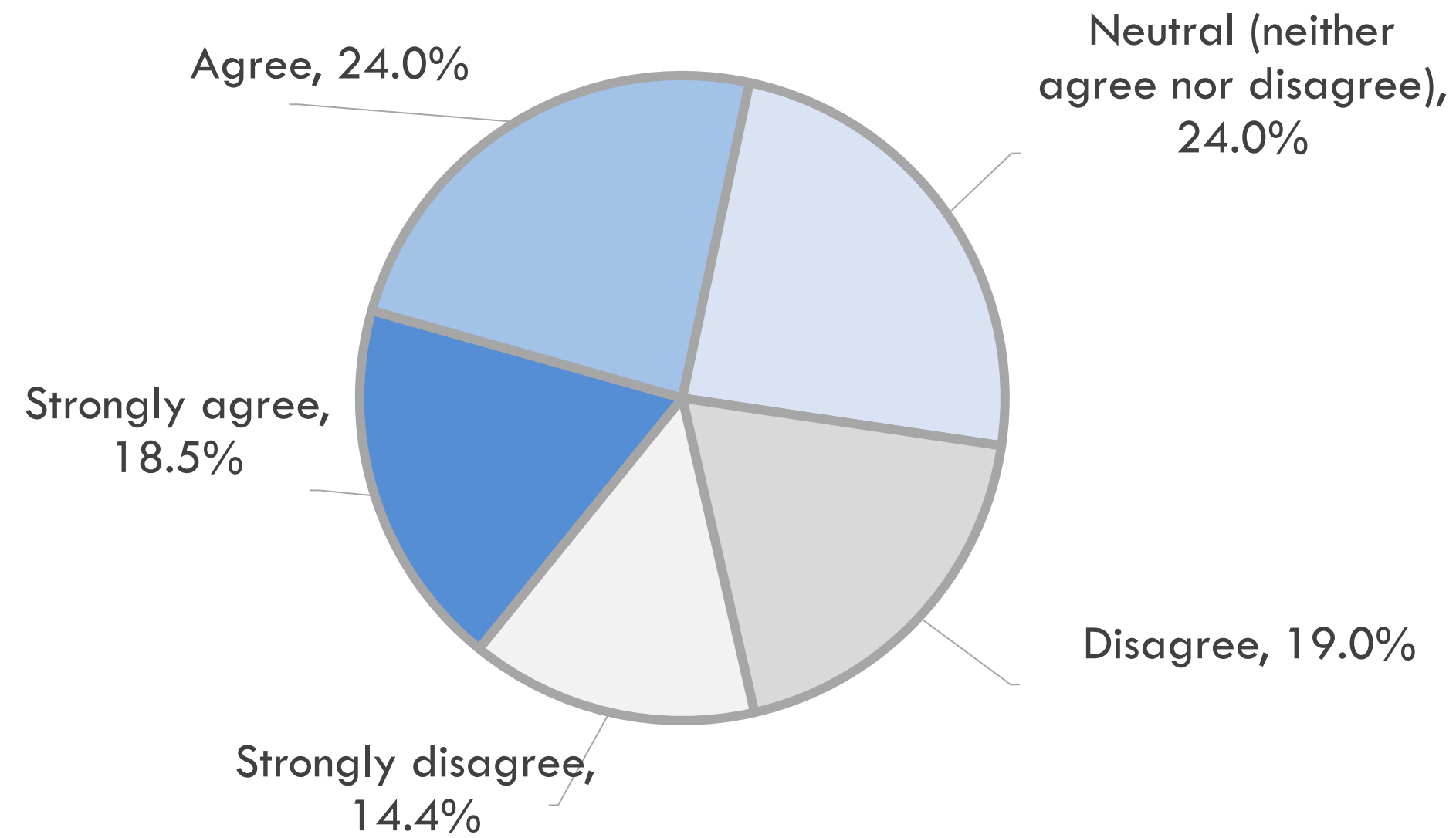
## Historical data



# LOSS OF INTEREST IN TRAVEL

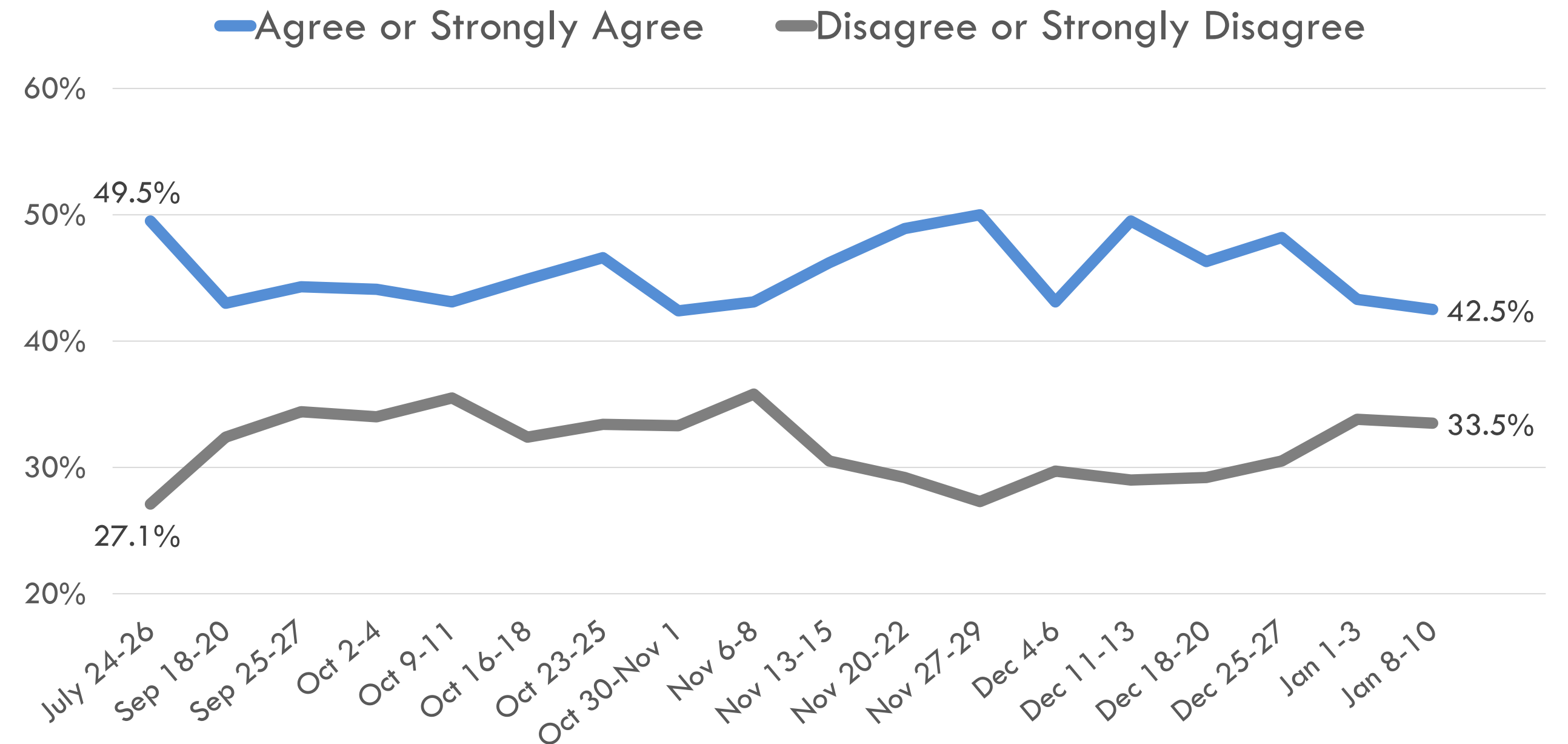
**How much do you agree with the following statement?**

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



(Base: Waves 20, 28-44 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)

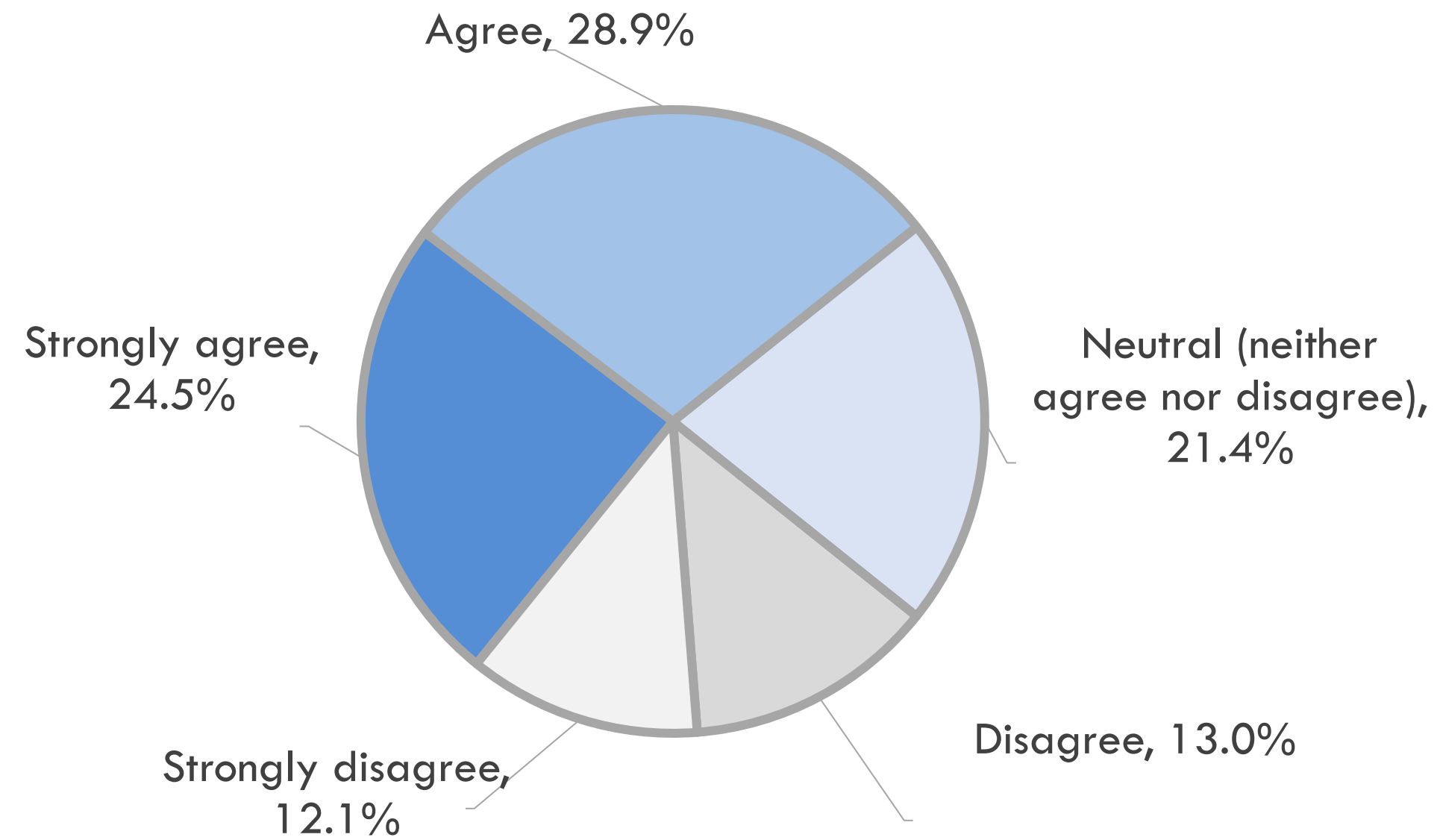
## Historical data



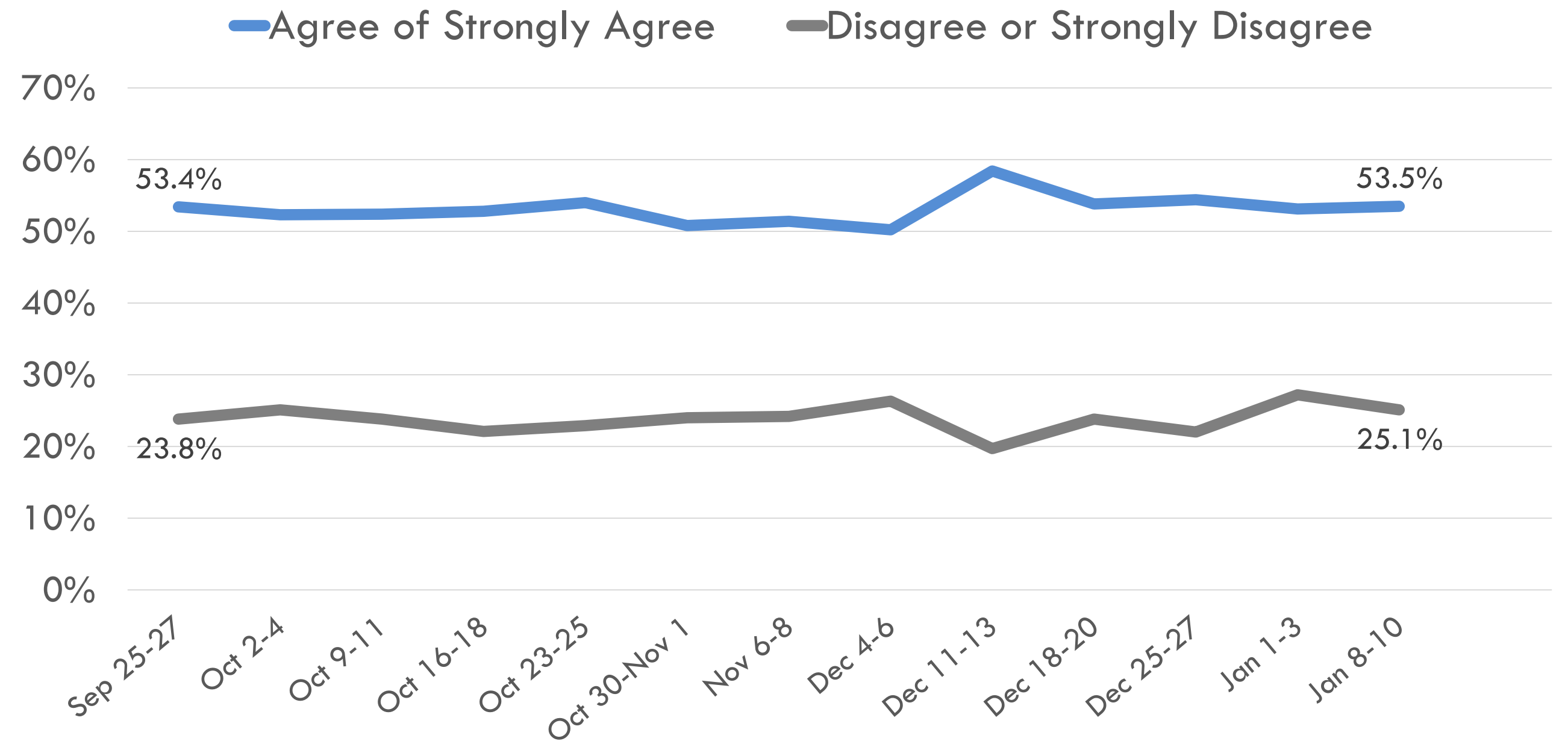
# TRAVEL AS AN ESSENTIAL NEED ONLY

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

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



## Historical data



(Base: Waves 29-35, 39-44 data. All respondents, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206 and 1,225 completed surveys.)



# **Coronavirus Travel Sentiment Index**

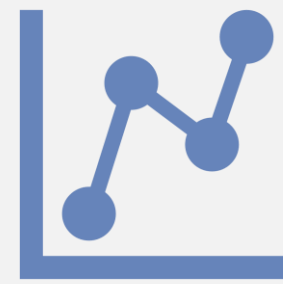
## **Measuring the Potential Influence of Travel Marketing**

**Highlights from the Week of January 11th**

# What is a Predictive Index?



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



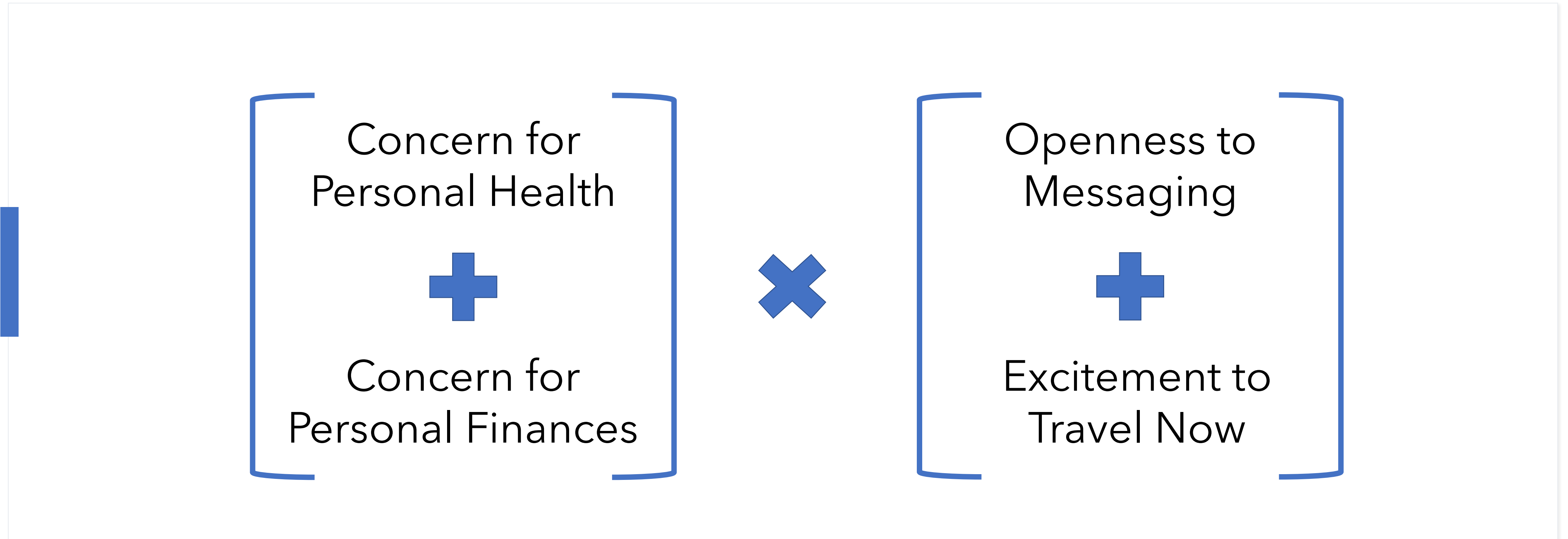
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

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

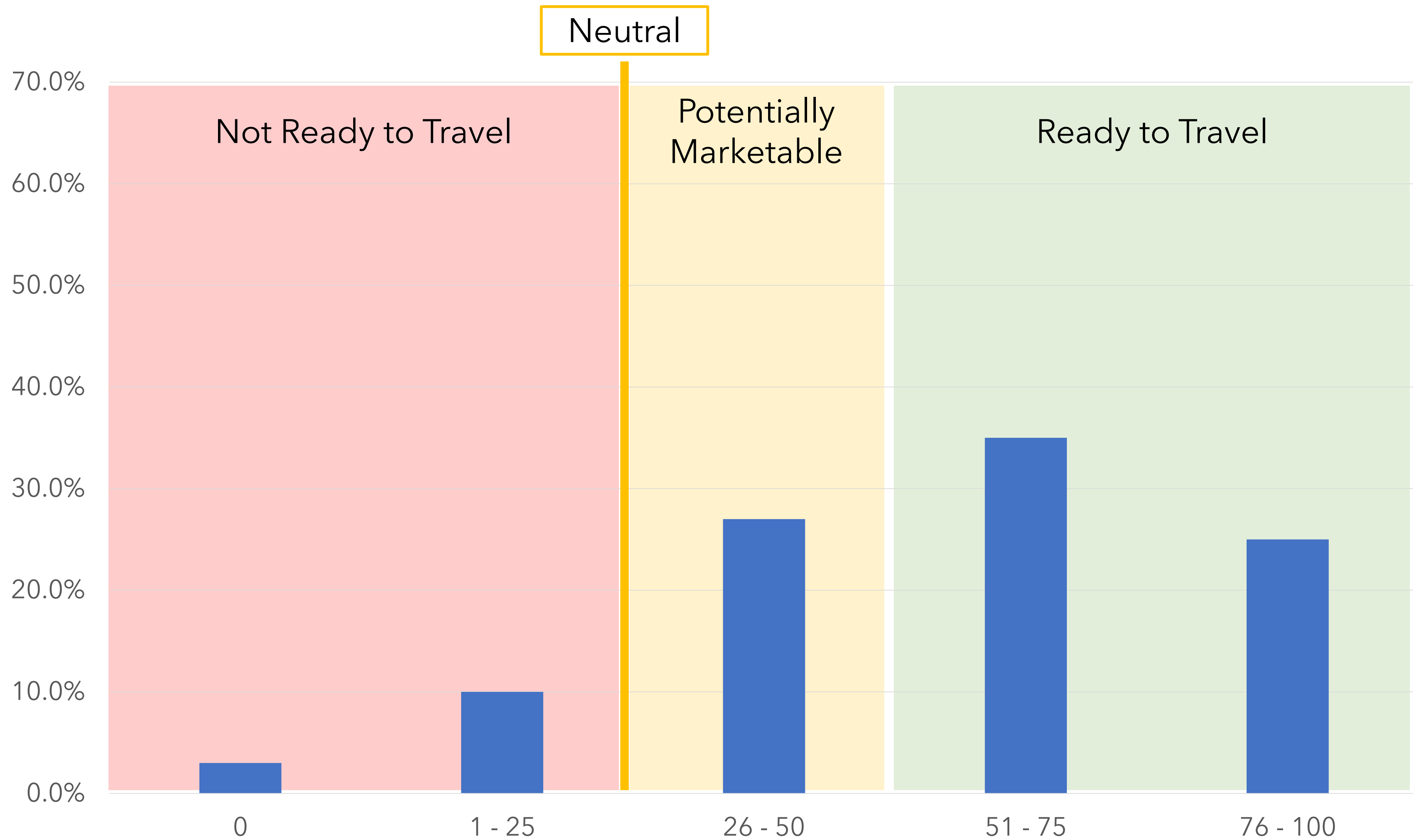
# Predictive Index Formula



\*Normalized to a 100pt scale

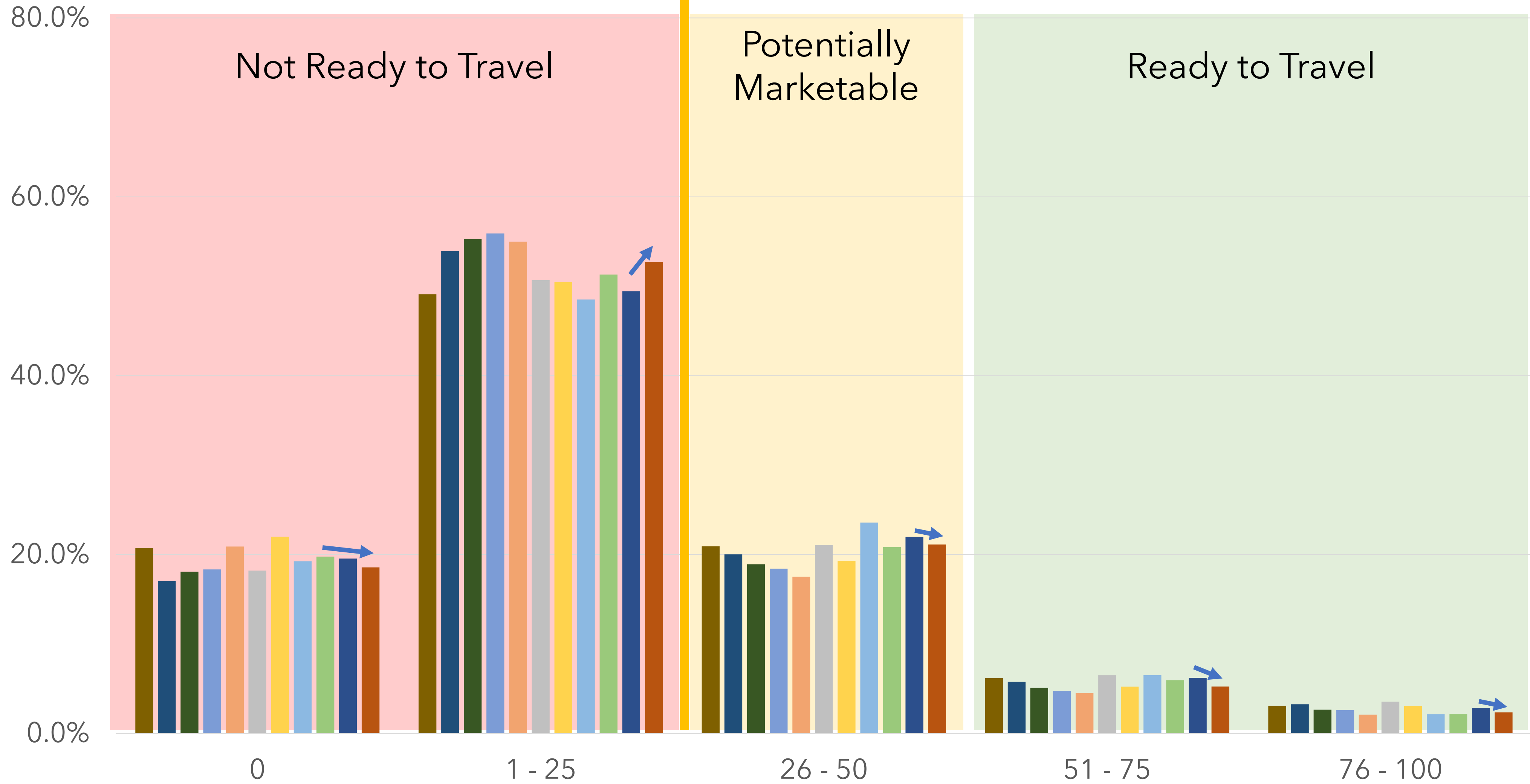


# Healthy Travel Outlook

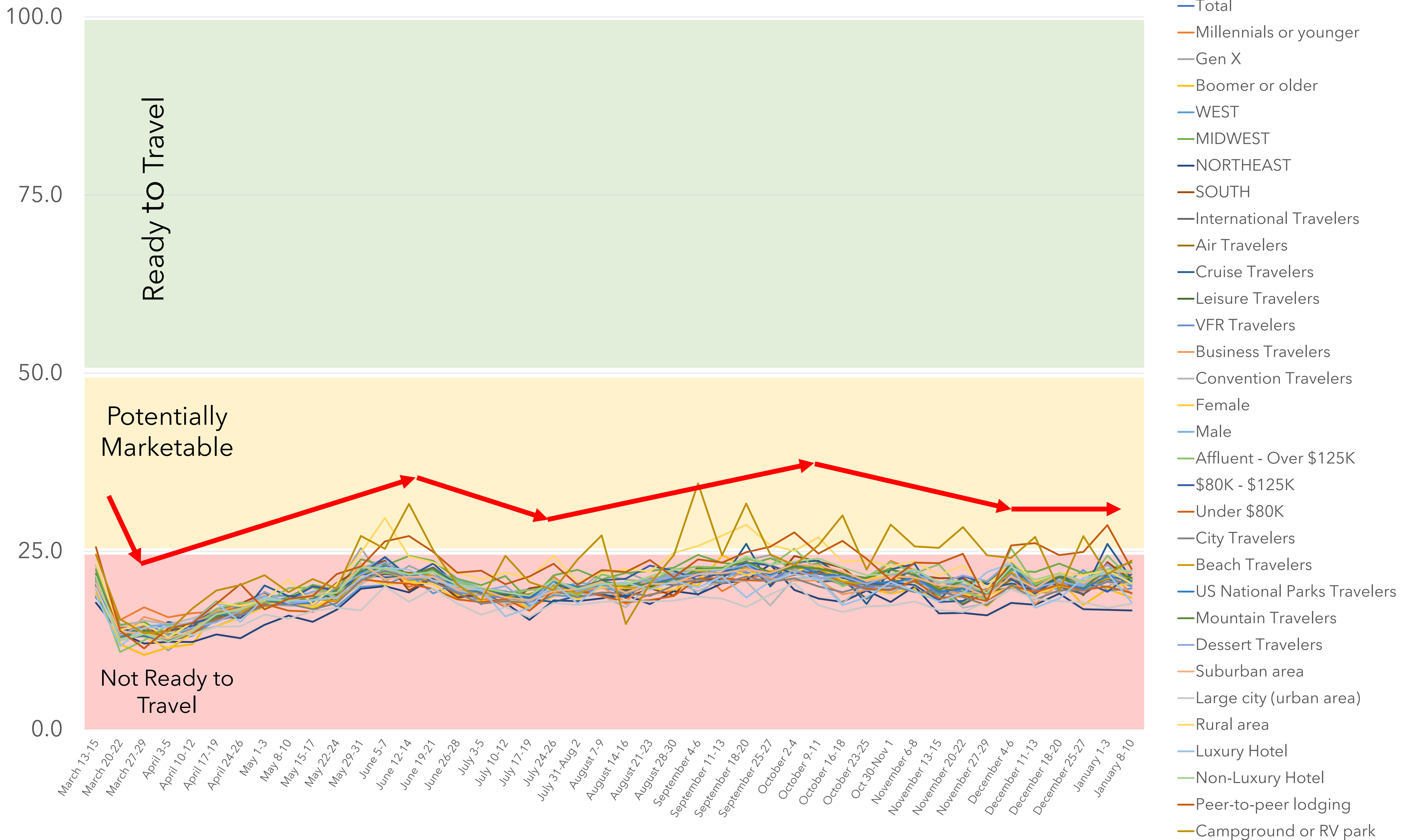


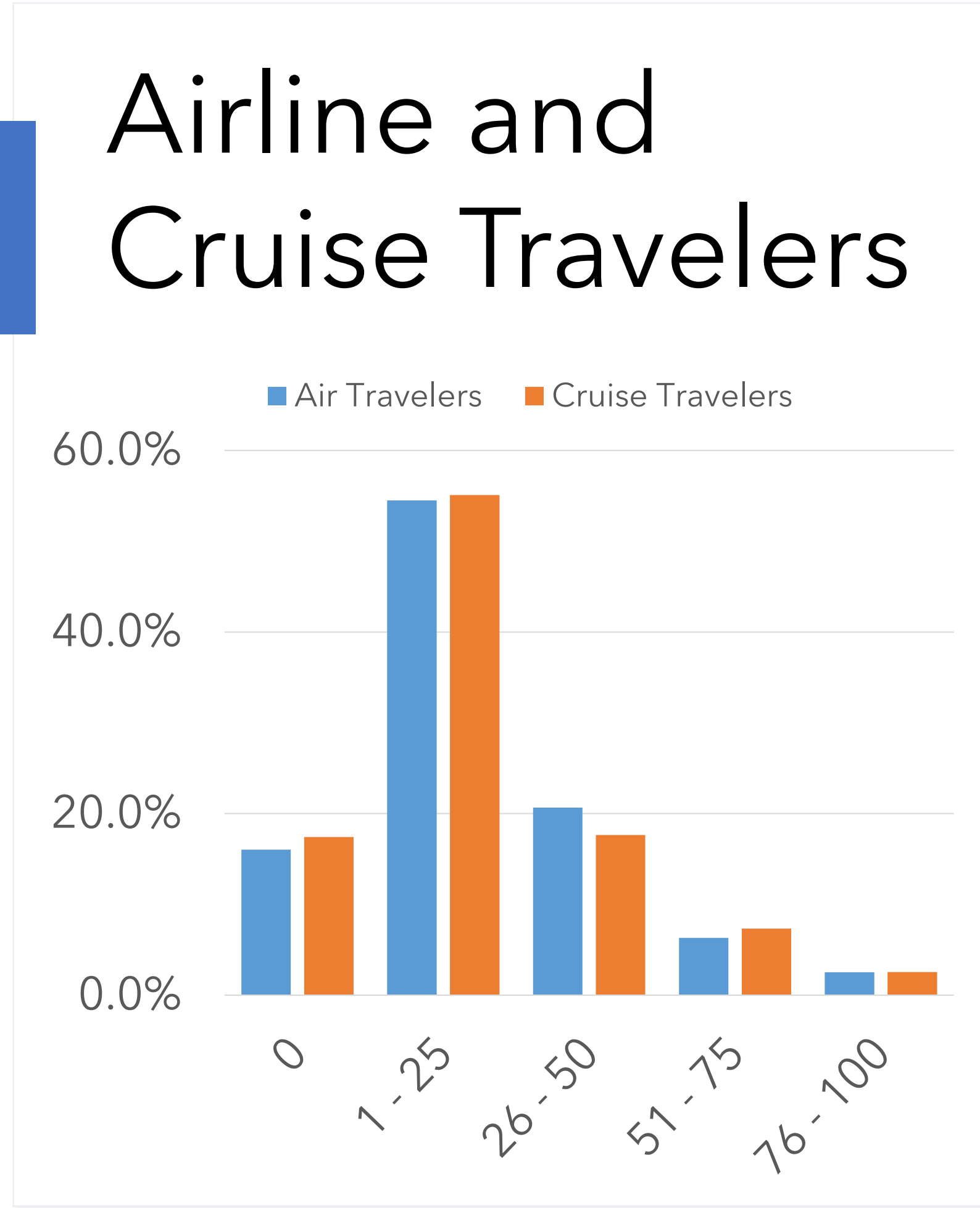
# Travel Outlook

Neutral

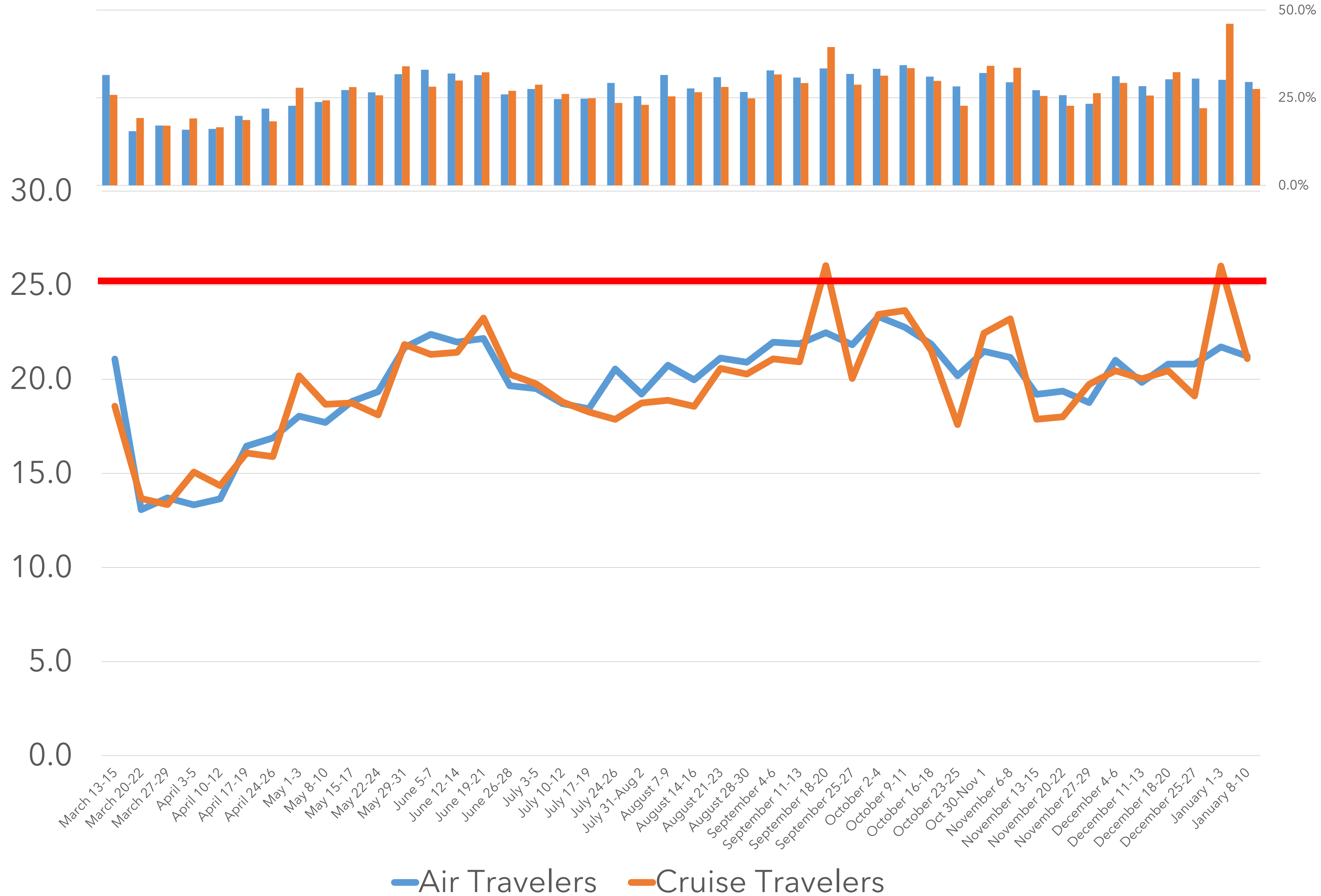


- Oct 30-Nov 1
- November 6-8
- November 13-15
- November 20-22
- November 27-29
- December 4-6
- December 11-13
- December 18-20
- December 25-27
- January 1-3
- January 8-10

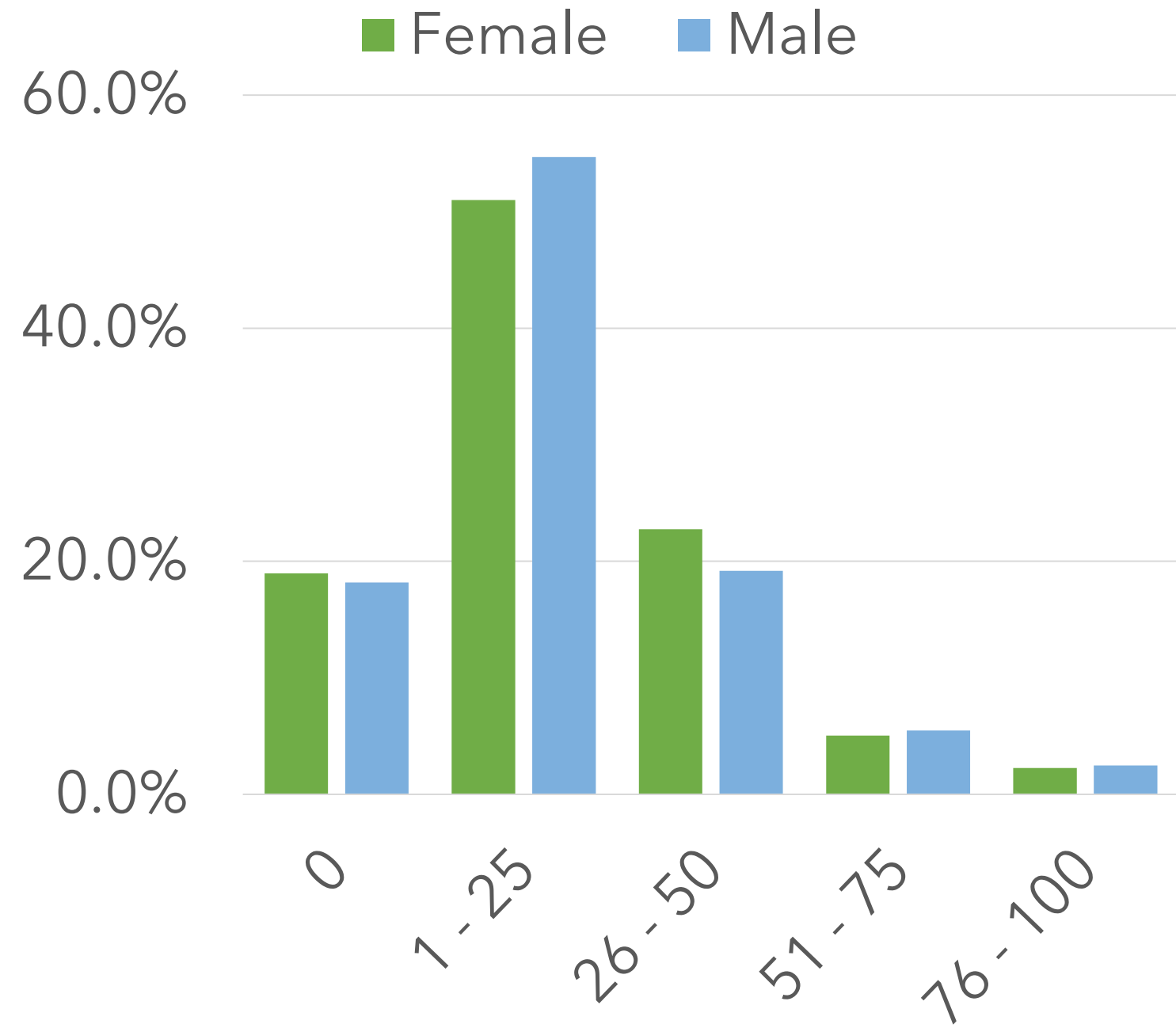




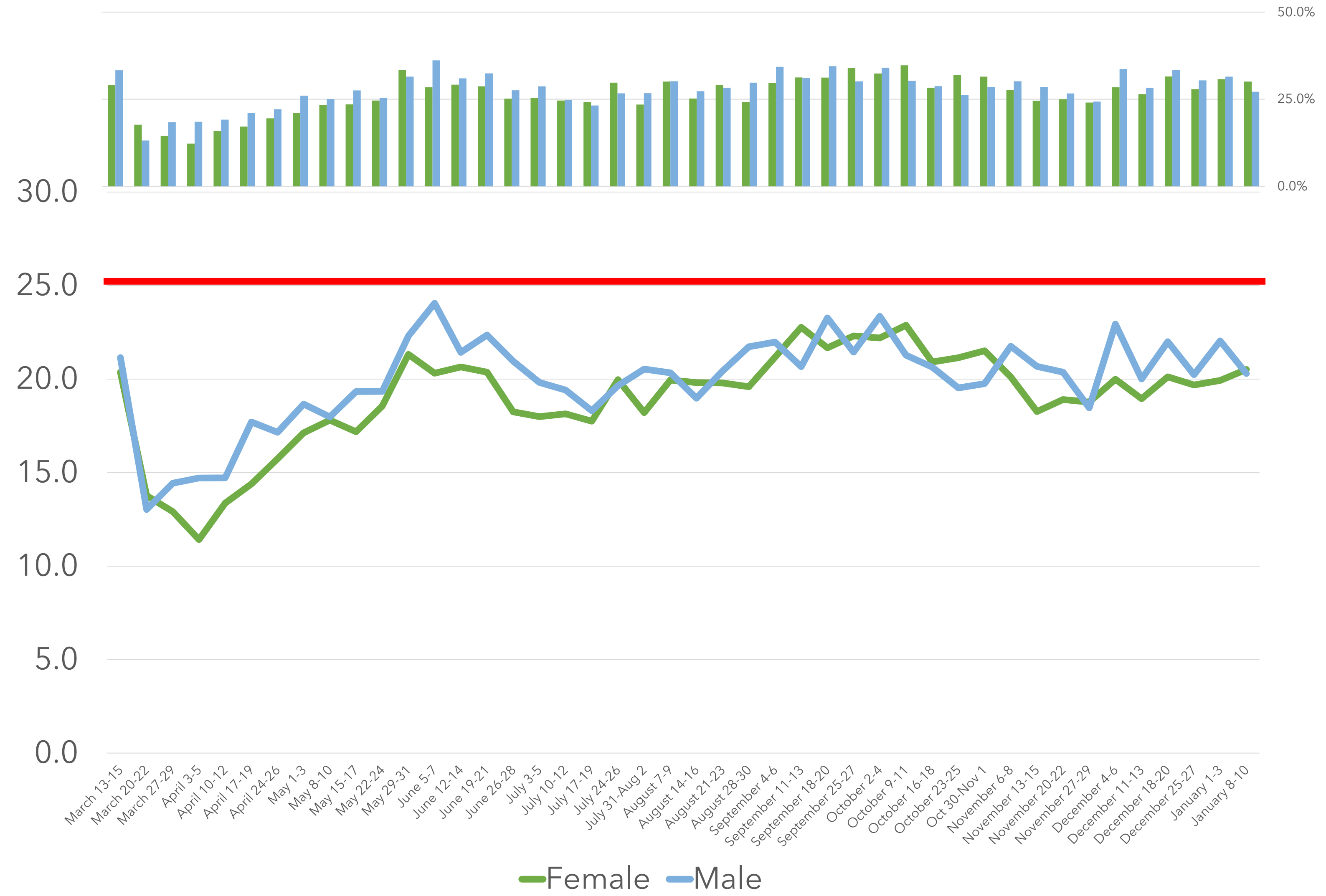
**Percent Potentially Marketable  
(Index Above 25)**



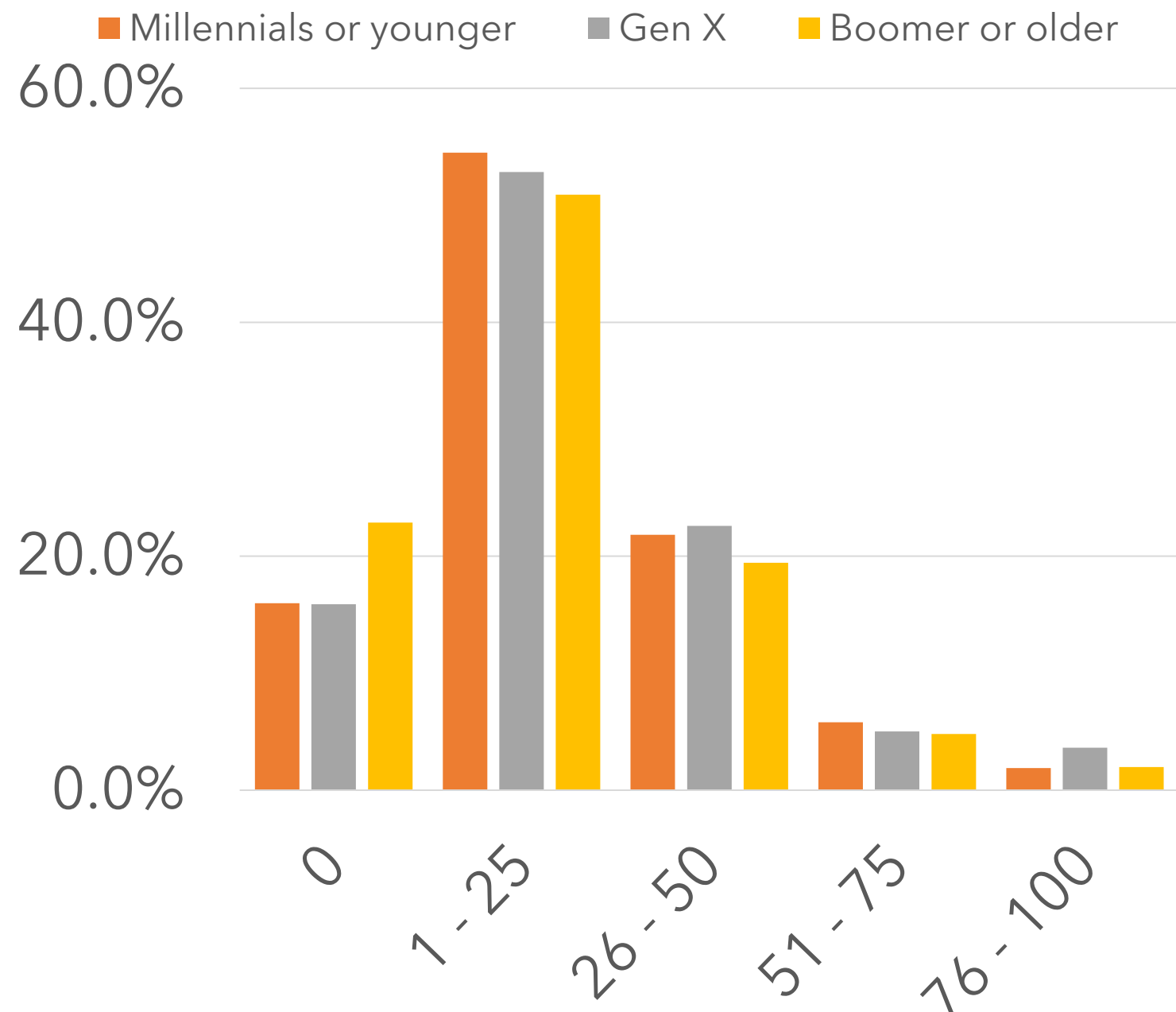
# Gender



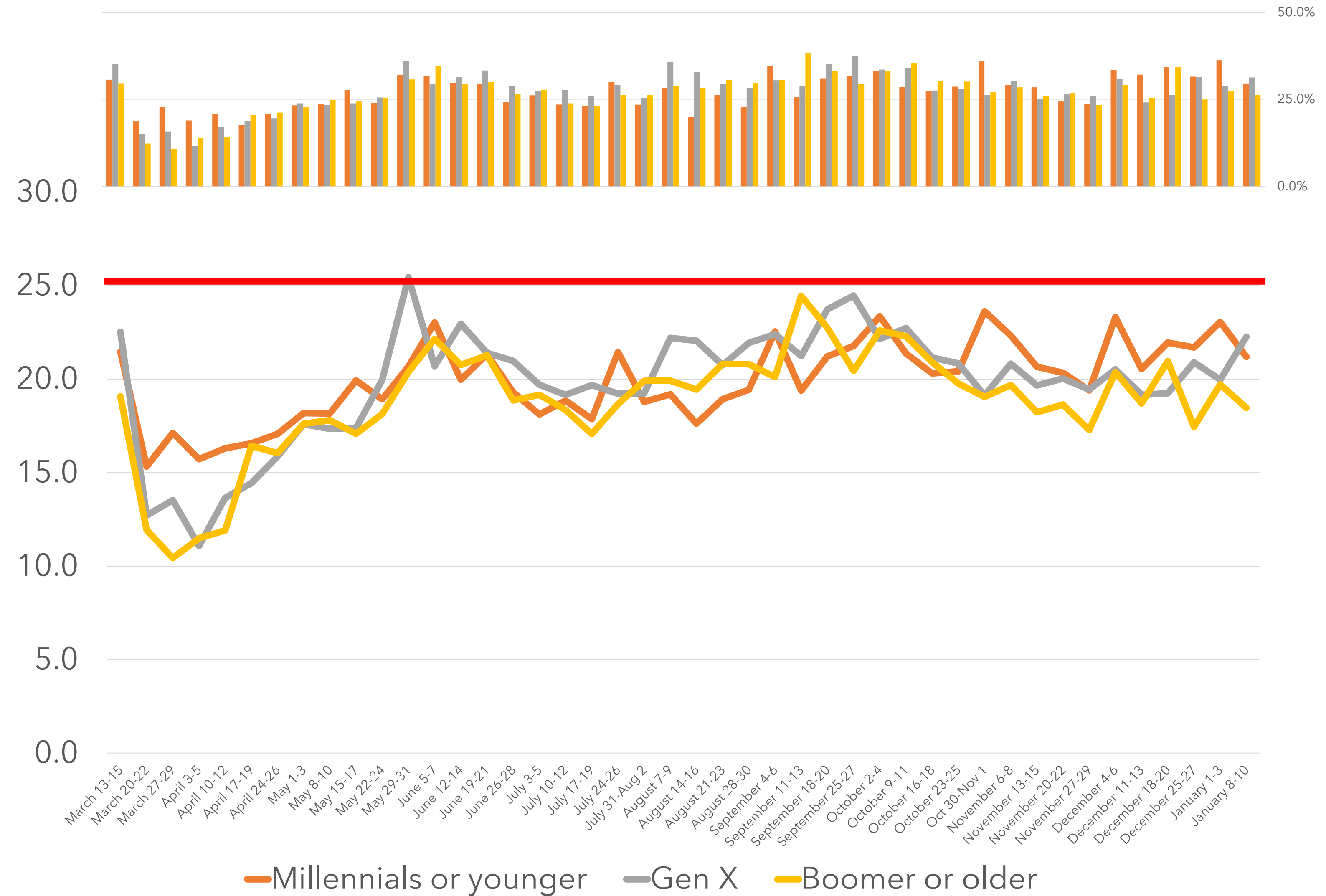
## Percent Potentially Marketable (Index Above 25)



# Generation

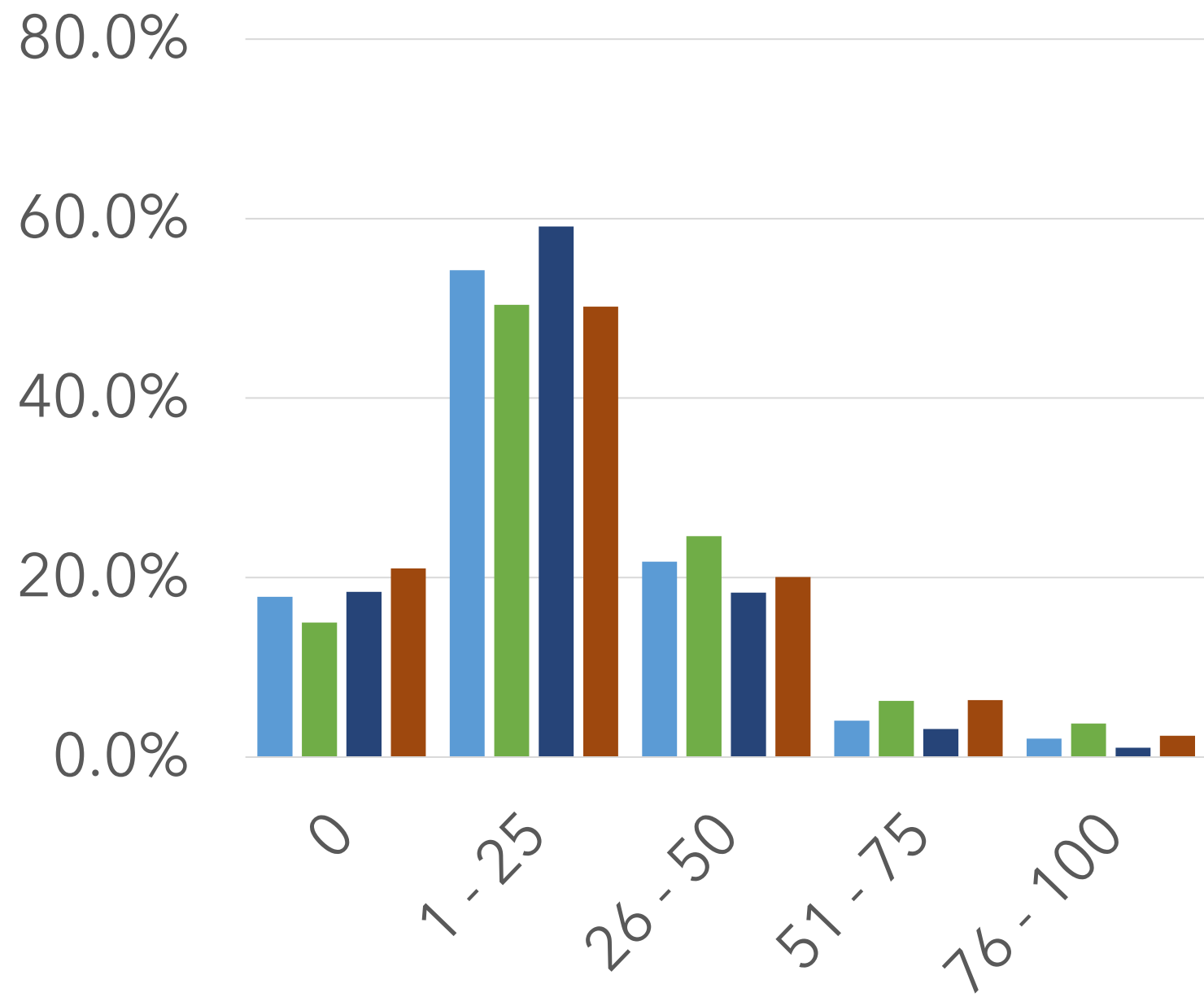


## Percent Potentially Marketable (Index Above 25)

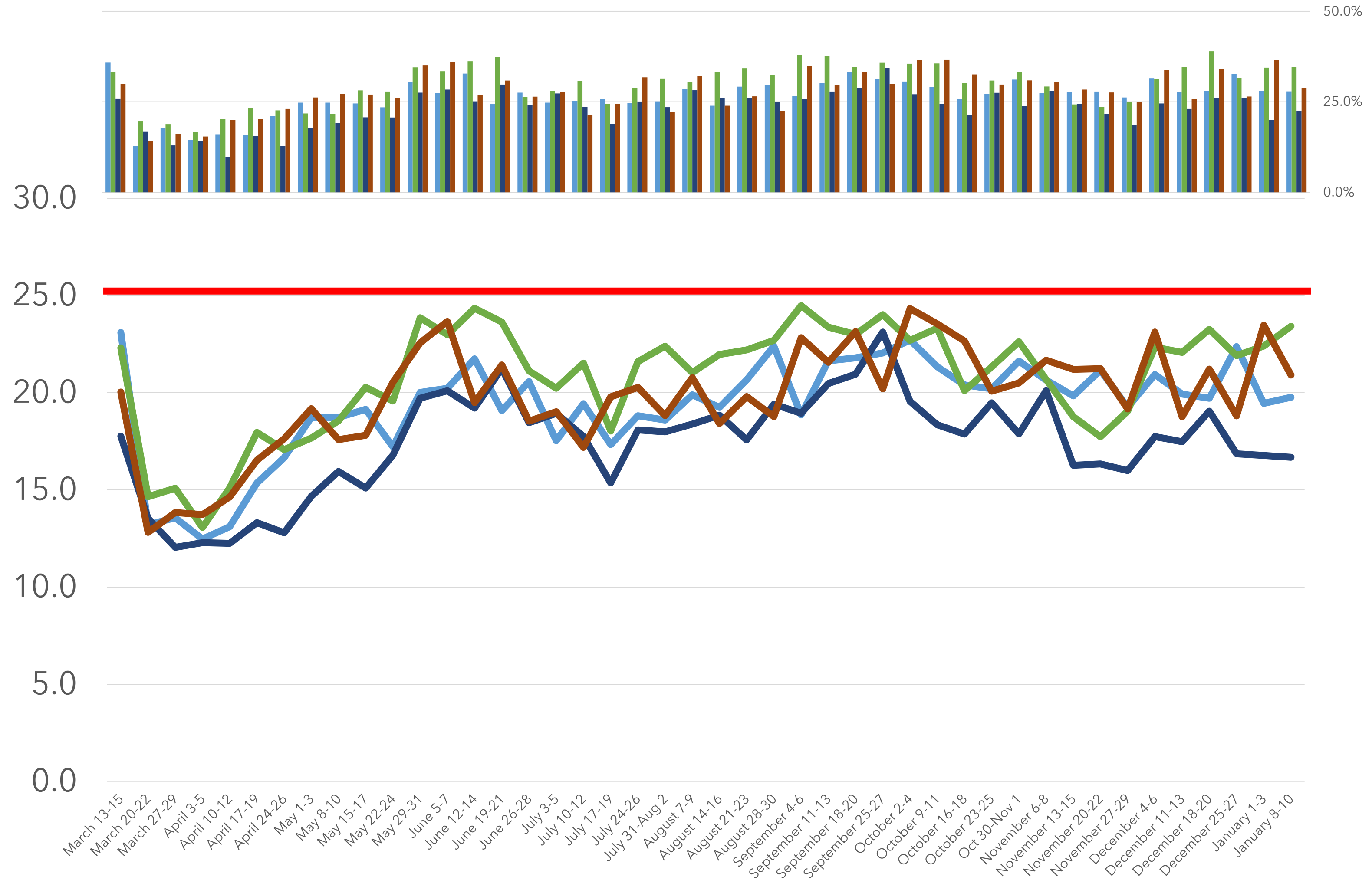


# US Regions

WEST MIDWEST NORTHEAST SOUTH

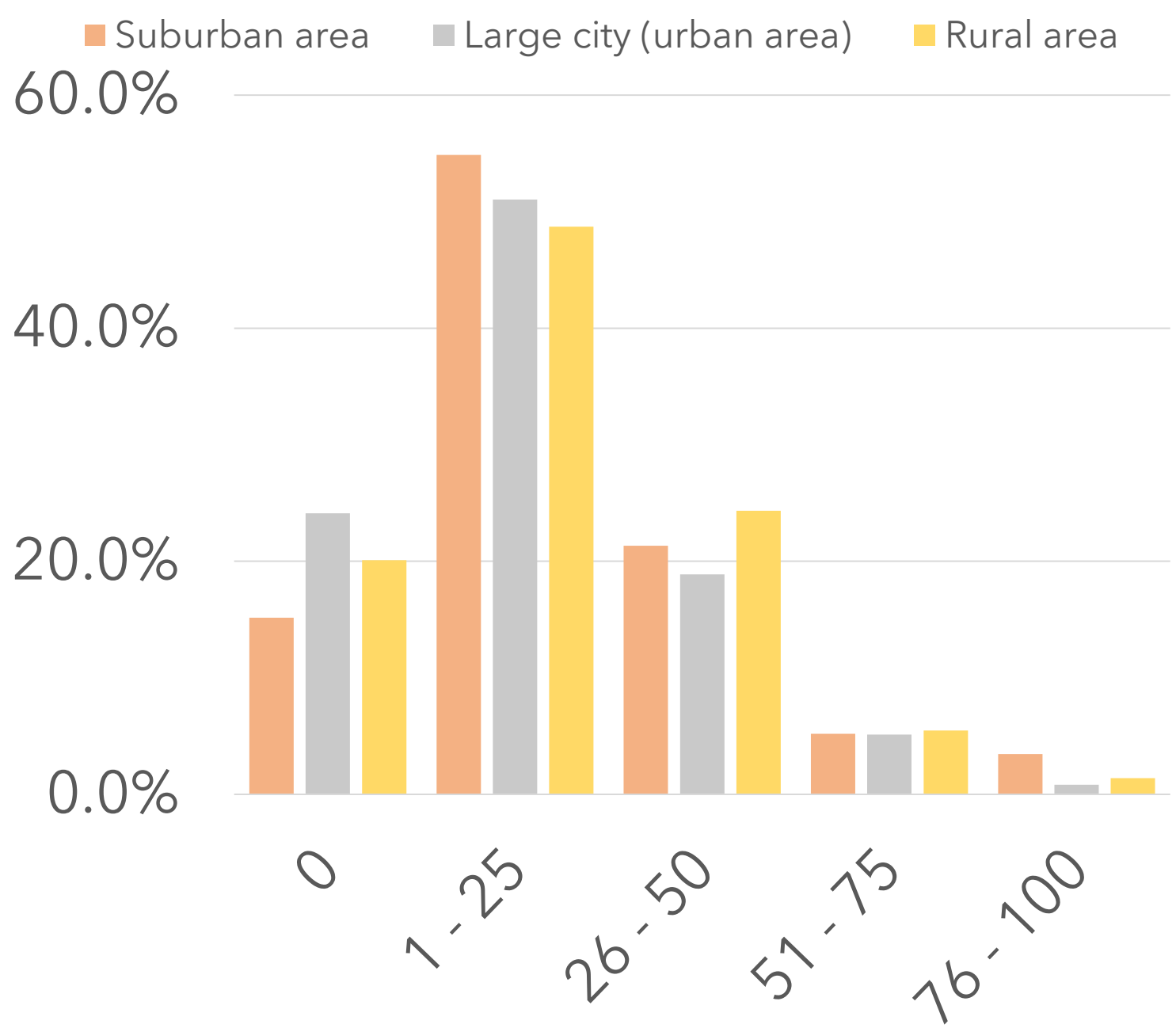


## Percent Potentially Marketable (Index Above 25)

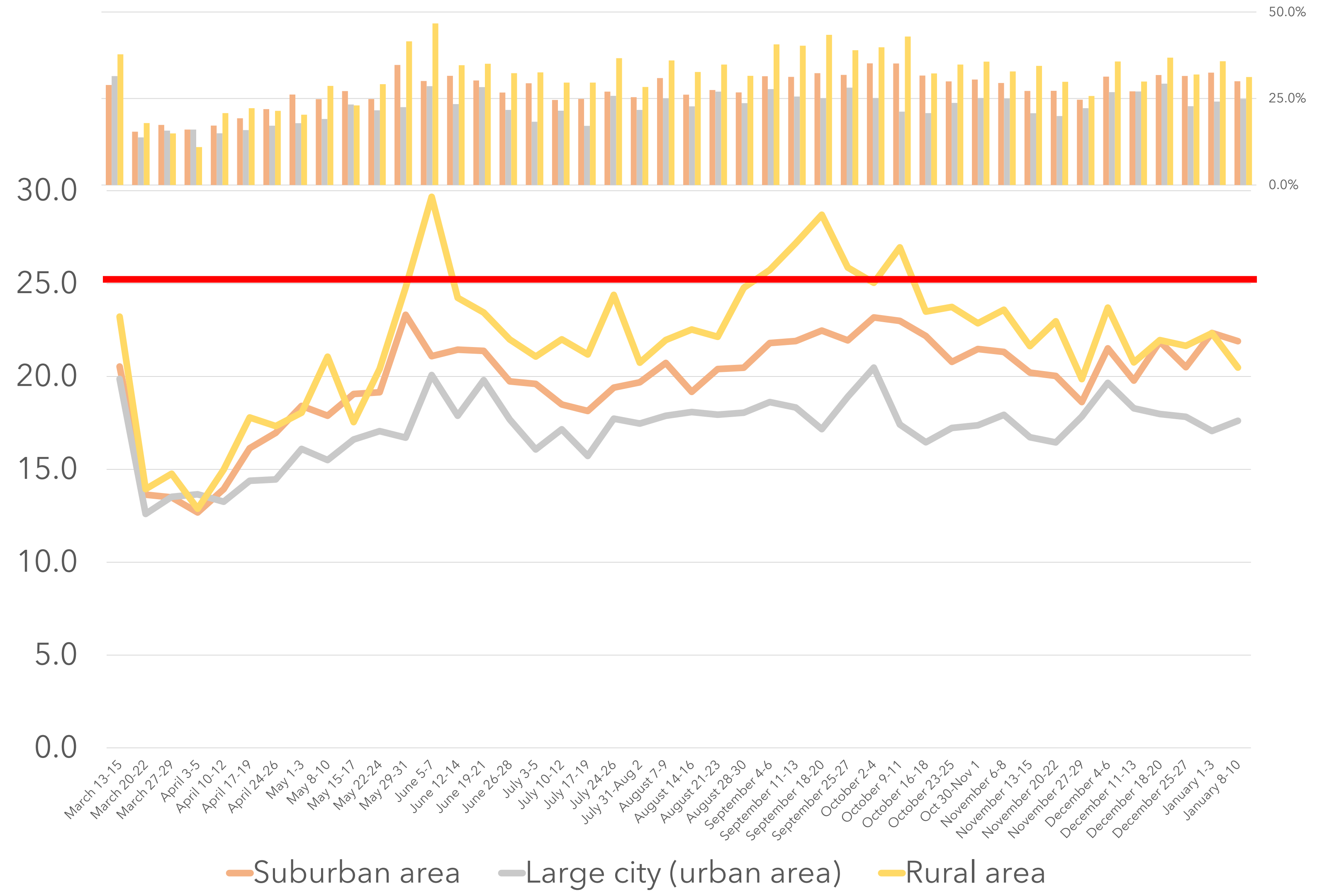


WEST MIDWEST NORTHEAST SOUTH

# Residence Type

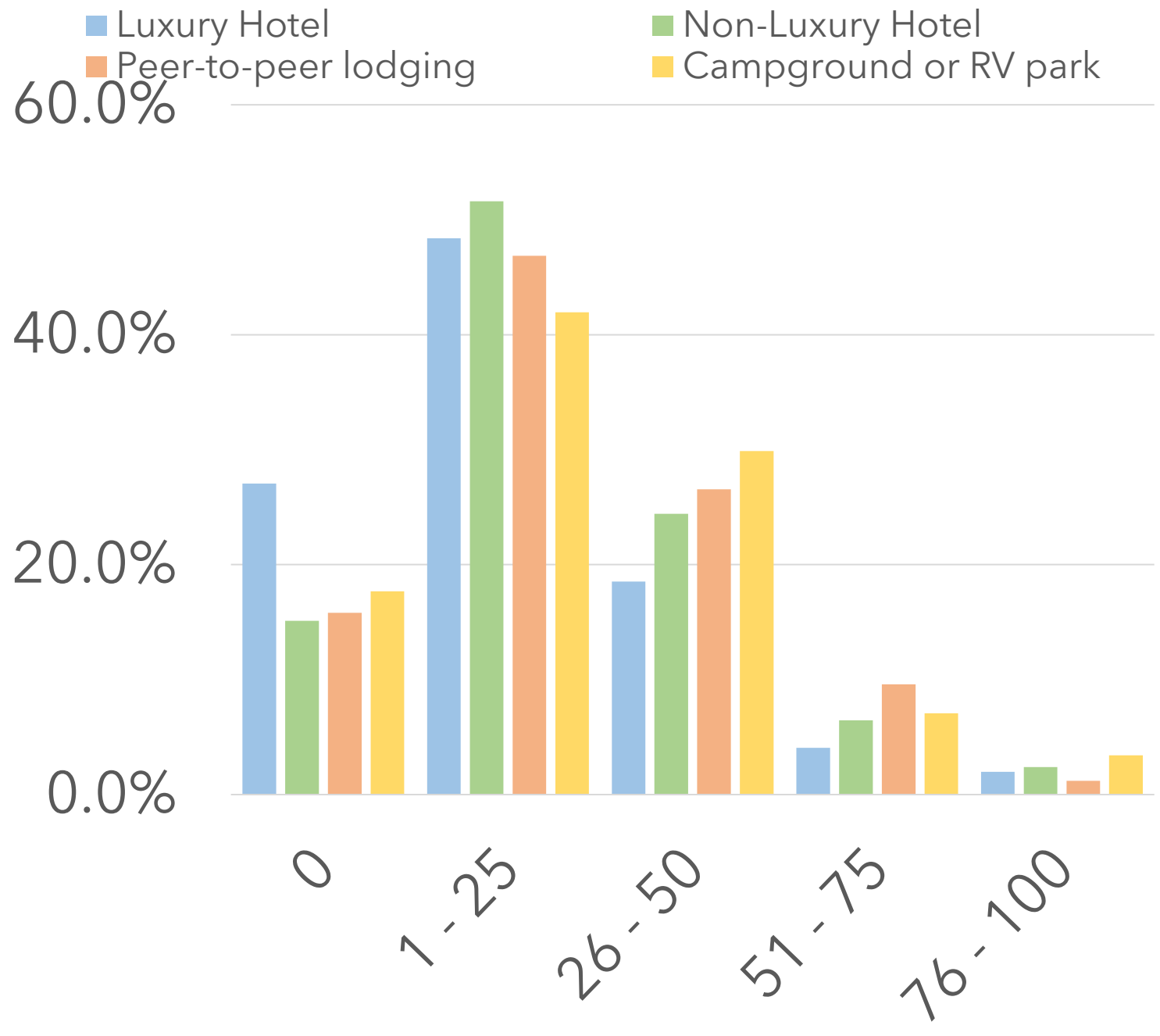


## Percent Potentially Marketable (Index Above 25)

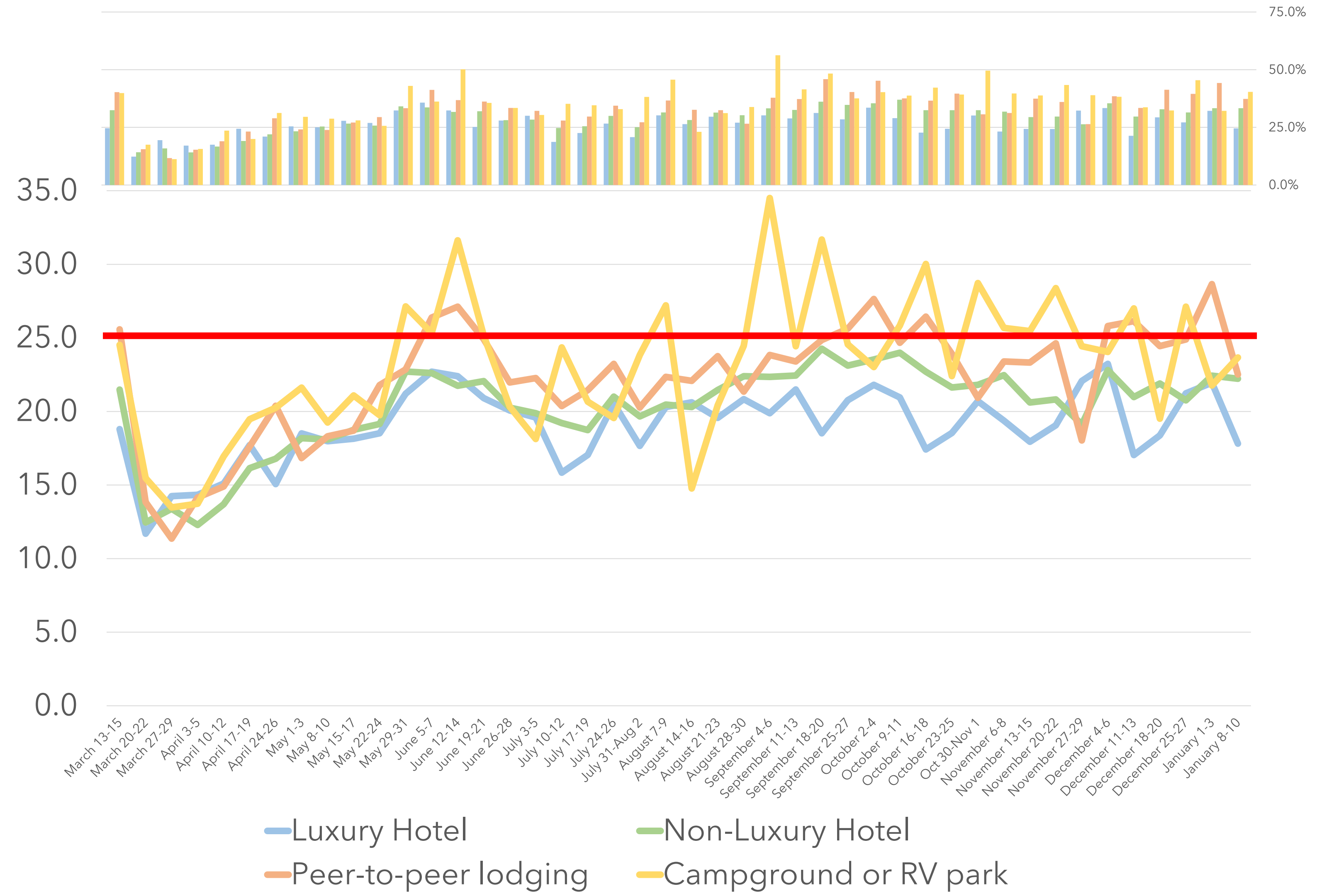




# Lodging Preference



## Percent Potentially Marketable (Index Above 25)



# ACCESSING DATA IN THE ONLINE DASHBOARD

08:54:30  
VOICE FEED: NETWORK: 12.38.73

Evolution:

SECURITY

Actual vs Target

PROFILE:

PROJECT:

MISSION

ADDRESS:

Market Share

KPI: Product

FRONT-CAMERA-IP: 143.453.00

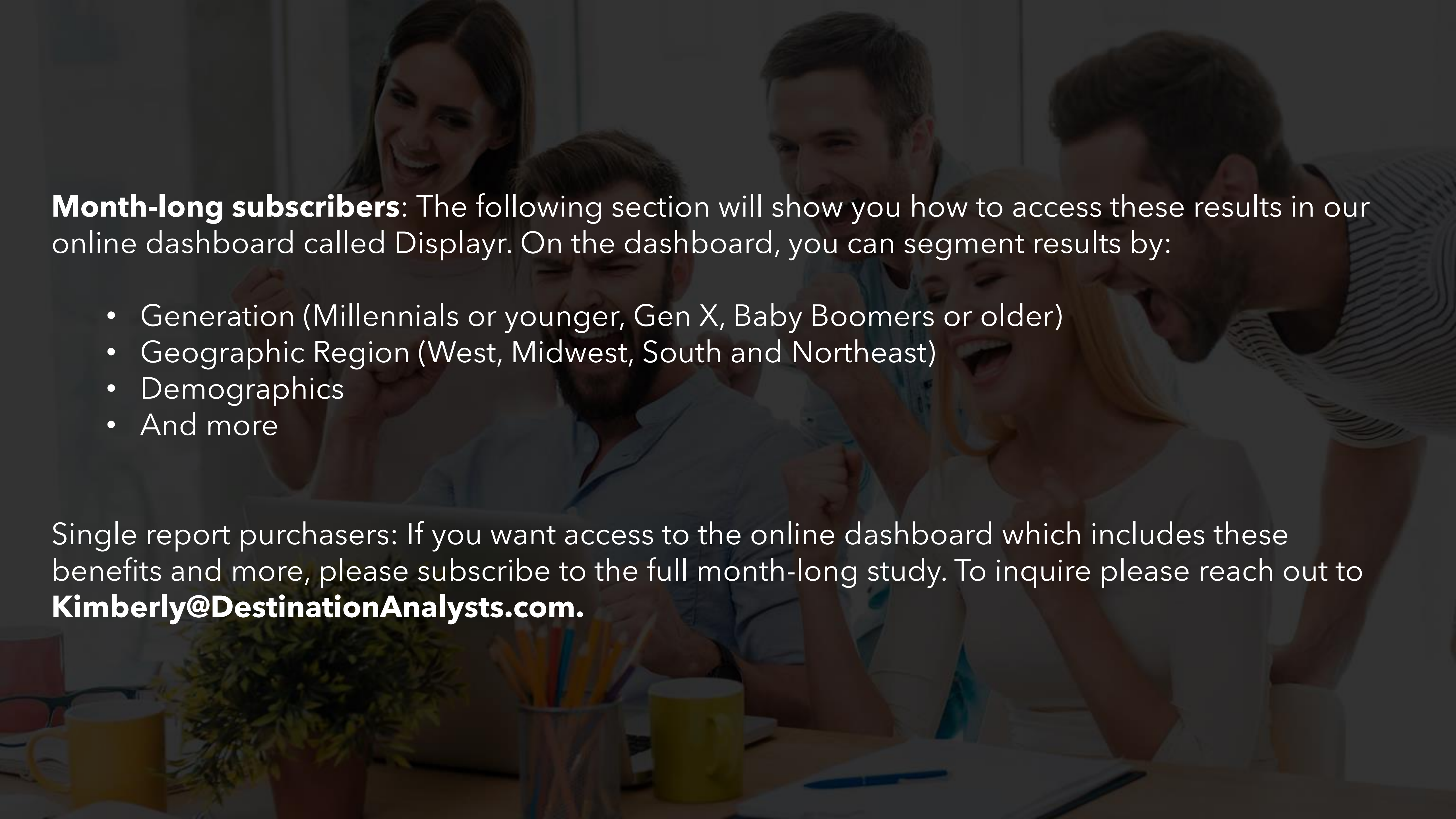
01:43:55

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

Customers Satisfaction

CONTROL-AREA





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

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

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

# HOW TO USE DISPLYR

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



60%

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

# NAVIGATING THE DASHBOARD:

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

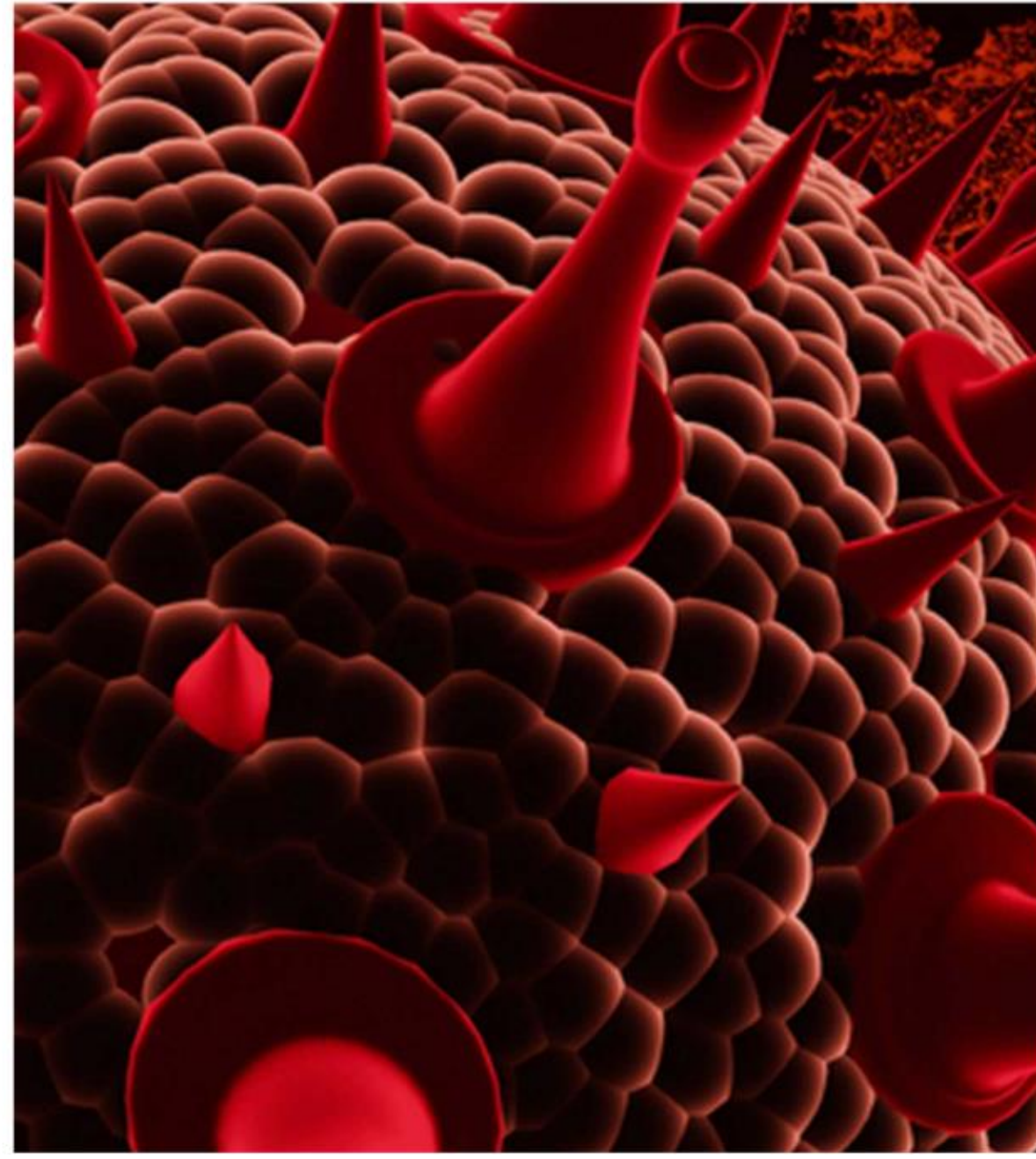
## Coronavirus Travel Sentiment Index Report

Filters ▾ Export ▾ ?

Search...

-  + 65%

- Project Overview
- Topline Findings
- Traveler Perceptions and Expectations



### Coronavirus Travel Sentiment Index Report

Online Dashboard

Last Updated: 3/16/2020

Research prepared by:

Destination  Analysts

# NAVIGATING THE REPORT:

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

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

## Coronavirus Travel Sentiment Index Report

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



# FILTERING THE REPORT:

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



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

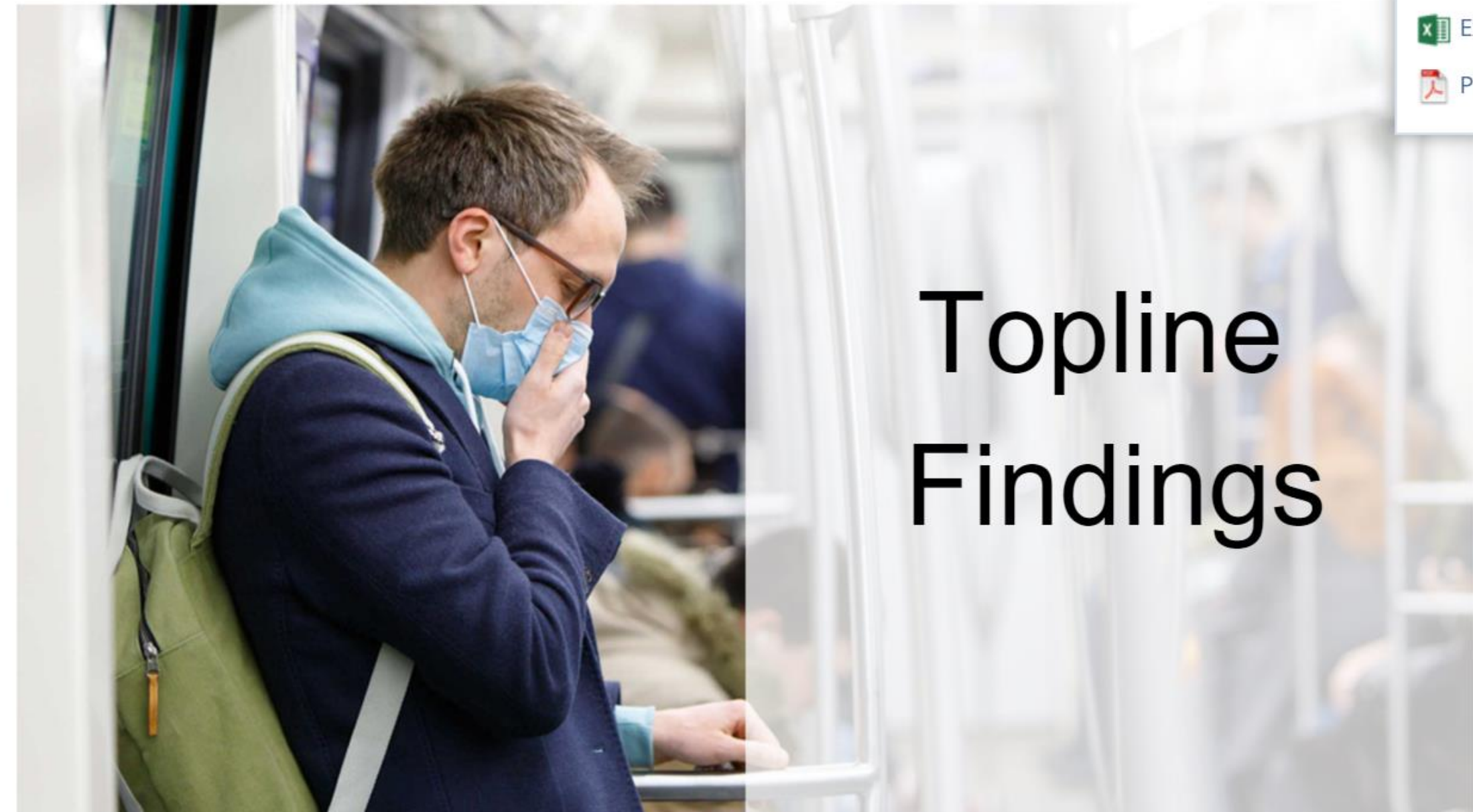
# EXPORTING THE DATA:

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

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

## Coronavirus Travel Sentiment Index Report

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



Topline Findings

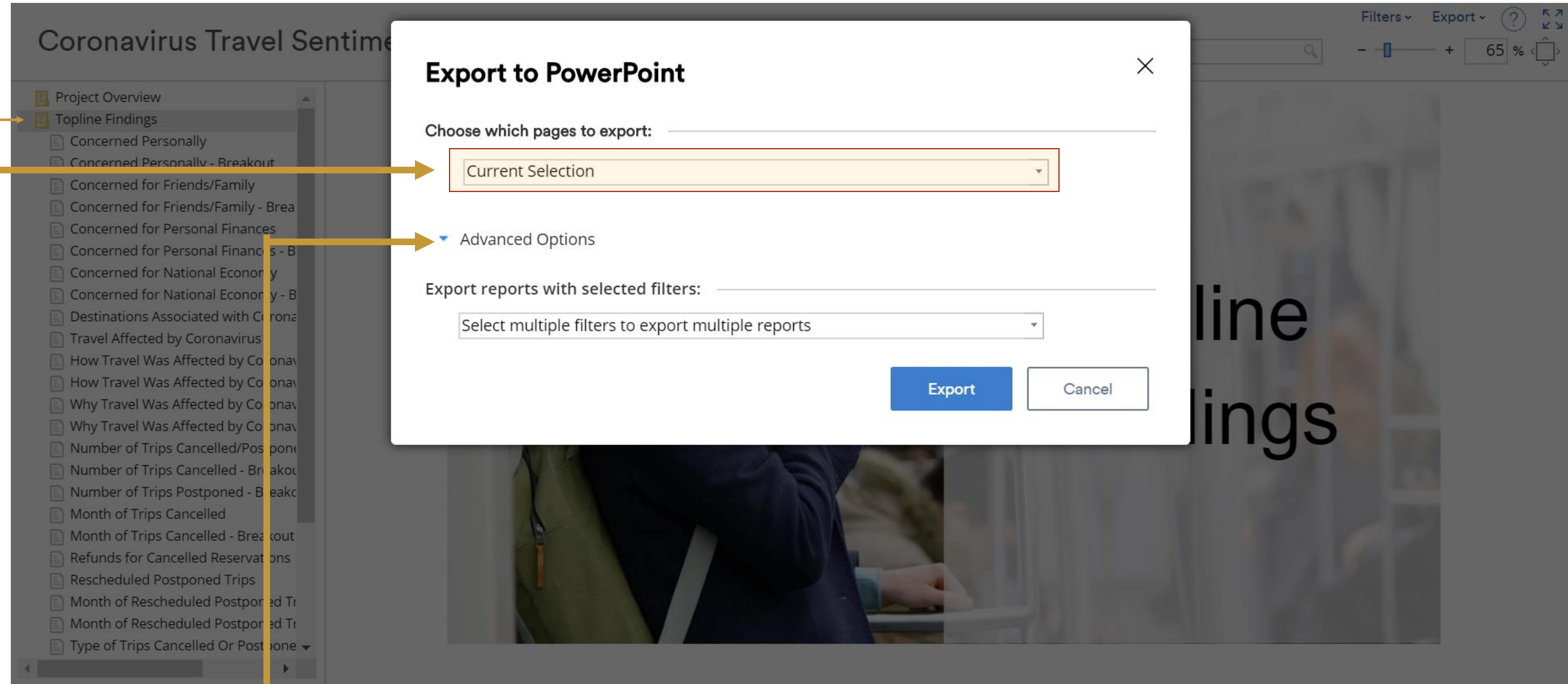


# EXPORTING THE DATA:

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

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

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



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

# NEED MORE HELP?

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

**Chingun Ganzorig**

**Research Manager**

**[Chingun@DestinationAnalysts.com](mailto: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

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

