# MARKETING THAT BRINGS MEETINGS

## Destination Analysts

### LEAD RESEARCH TEAM:





**DO YOUR RESEARCH** 



#### Erin Francis-Cummings President & CEO

Myha Gallagher Senior Director of Research

## Destination Analysts



## Destination Analysts

#### WE HAVE WORKED WITH 200+ TRAVEL & TOURISM CLIENTS



Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.



## THANK YOU

# PARTNERSHIP



## THE RESEARCH

Survey of **Meeting Planners**  First Launched in **20**20 Conducted in **June** 

2020 Conducted again this October

**300** Completed Surveys

Destination Analysts

## AGENDA

PLANNER PROFILE & THE IMPACT OF THE COVID-19 PANDEMIC

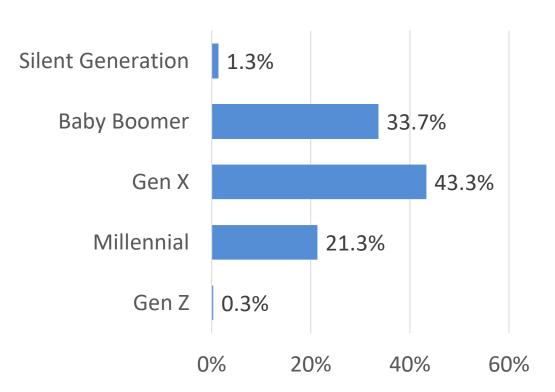
CHALLENGES & RECOVERY

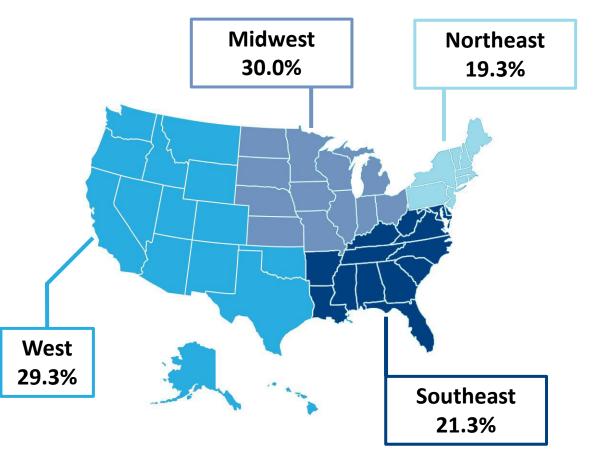
MARKETING YOUR DESTINATION FOR MEETINGS

# MEETING PLANNER PROFILE



### **GENERATION & REGIONAL LOCATION**



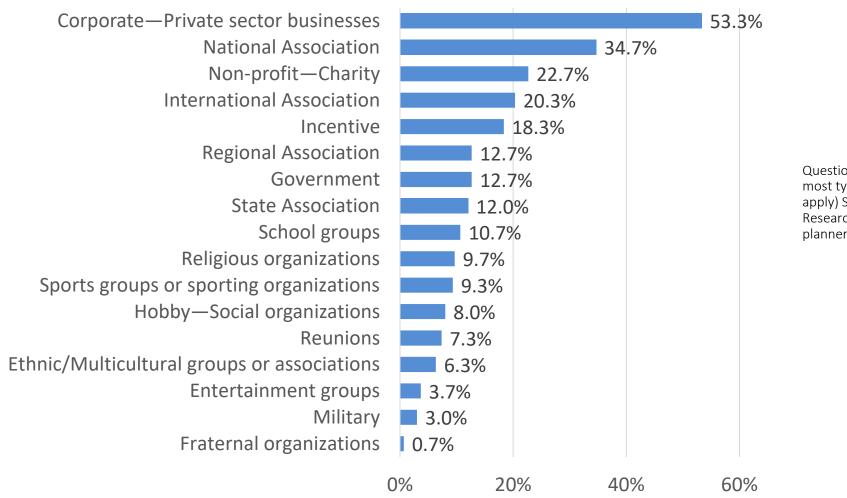


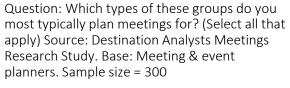
Question: Which generation do you belong to? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

Question: Which area of the United States are you located in? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



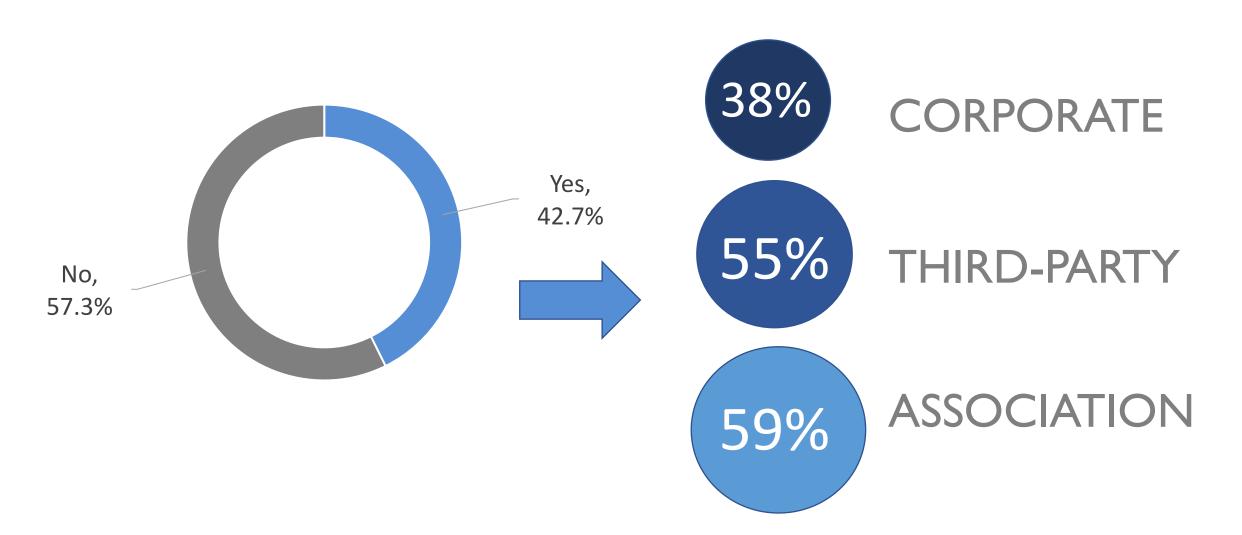
### GROUPS THEY TYPICALLY PLAN FOR







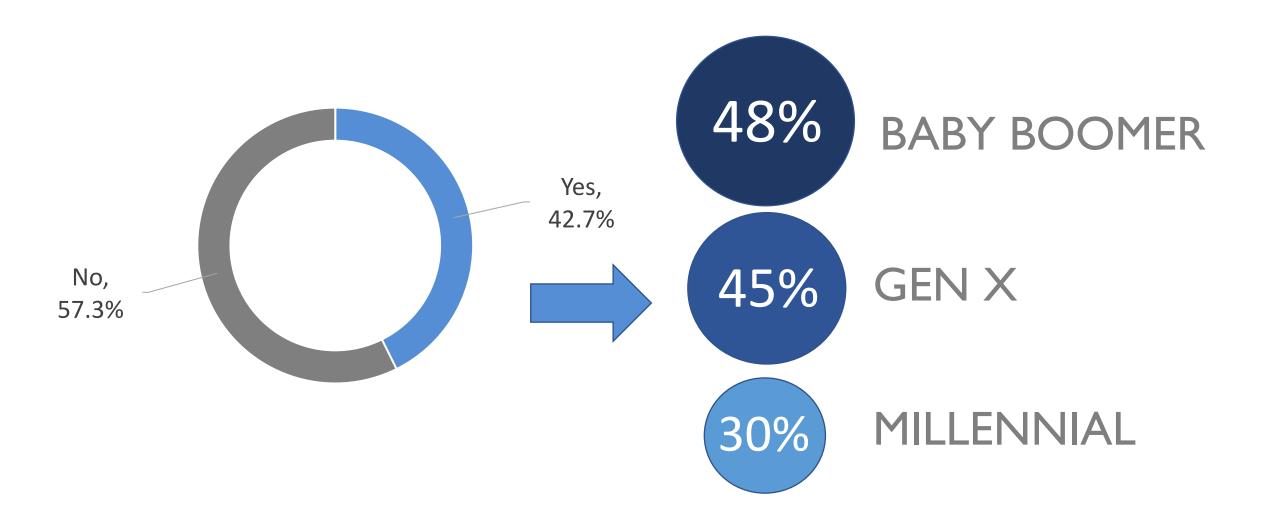
#### CURRENTLY WORKING WITH CVBS



Question: Are you currently working with any Convention & Visitors Bureaus? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### CURRENTLY WORKING WITH CVBS





## THE IMPACT OF THE COVID-19 PANDEMIC

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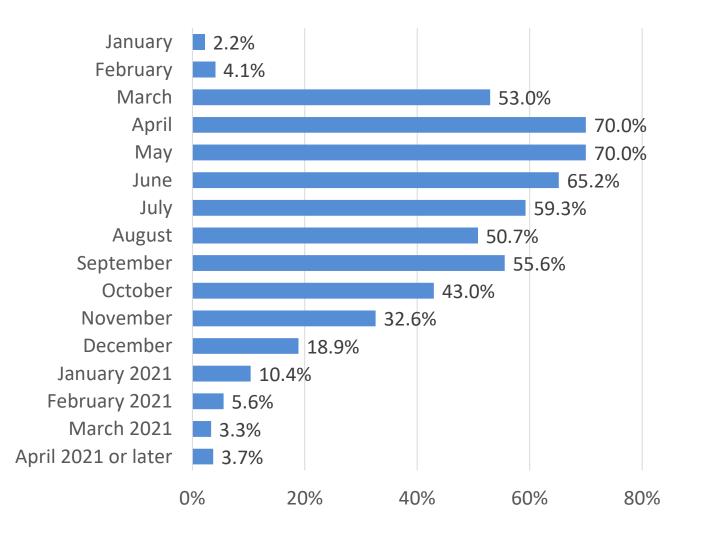
#### AVERAGE NUMBER OF LIVE MEETINGS CANCELLED

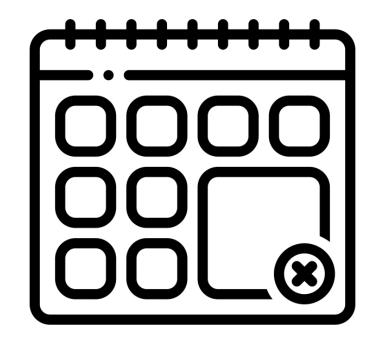


Question: Since the Coronavirus situation emerged, how many live/in-person meetings or events has your organization or clients cancelled? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### TIMING OF CANCELLED MEETINGS







Question: In which months were any of these cancelled live meetings or events originally scheduled to take place? ? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 270

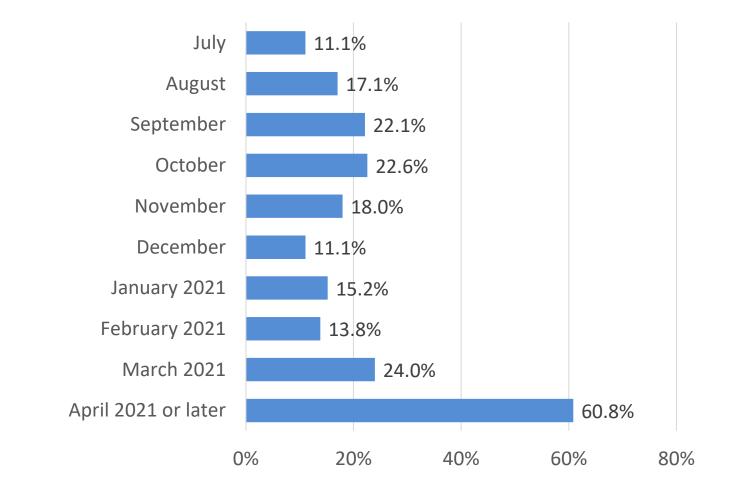
#### AVERAGE NUMBER OF LIVE MEETINGS POSTPONED



Question: Since the Coronavirus situation emerged, how many live/in-person meetings or events has your organization or clients postponed? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### MONTH OF POSTPONEMENT

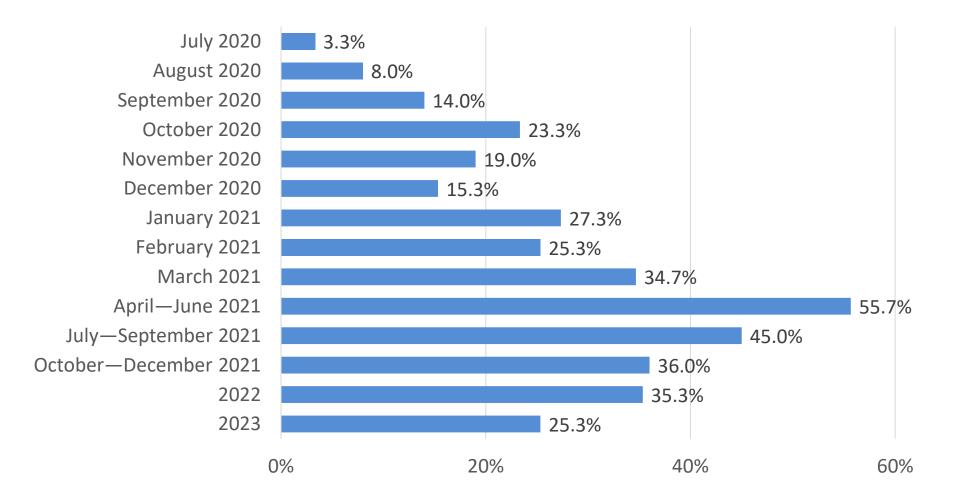






Question: In which months were any of these postponed live meetings or events rescheduled to? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 217

#### TIMING OF CURRENT BOOK OF BUSINESS

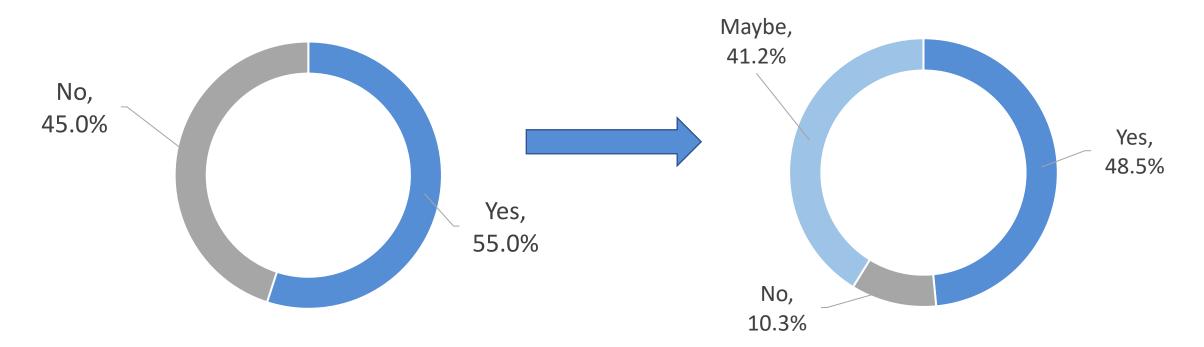


Question: Please tell us about the live meetings and events you currently have on the books. In which months and years do you have live meetings or events scheduled? (Select all that apply) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### WORKING EVENTS SCHEDULED FOR NEXT 6 MONTHS





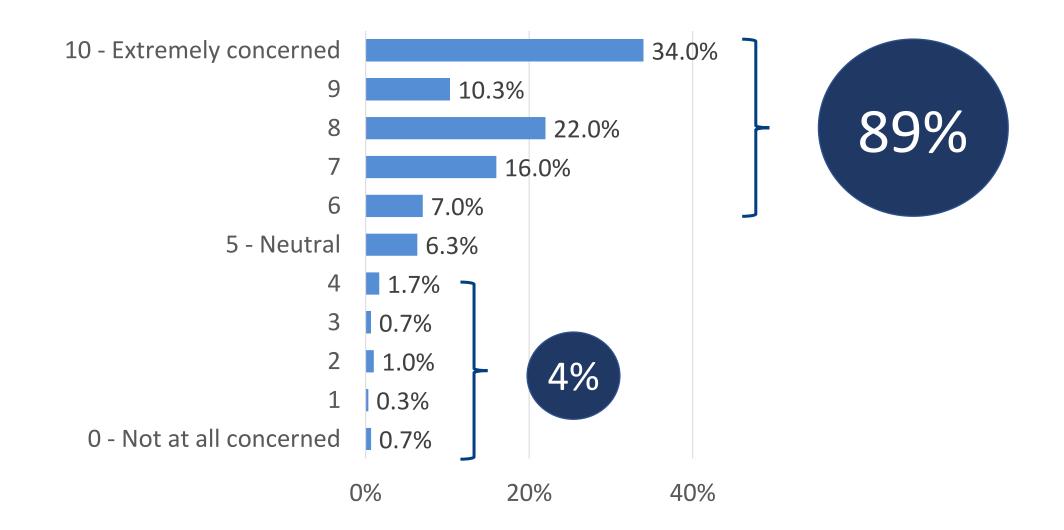
Question: Are you currently working on any meetings or events that are already scheduled or being considered for the NEXT SIX (6) MONTHS? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

Question: Will any of these live meetings have a virtual option for those that do not want to attend live? Sample Size = 165



## CHALLENGES + RECOVERY

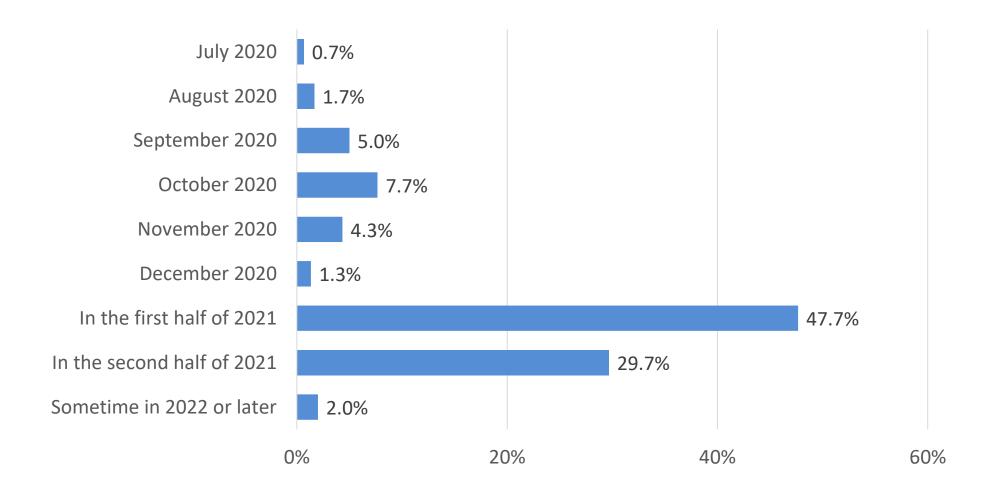
#### CONCERN ABOUT INDUSTRY'S RECOVERY



Question: Thinking about the current coronavirus situation, how concerned are you about the meetings industry recovering within the next twelve months? (Please answer using the scale below) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



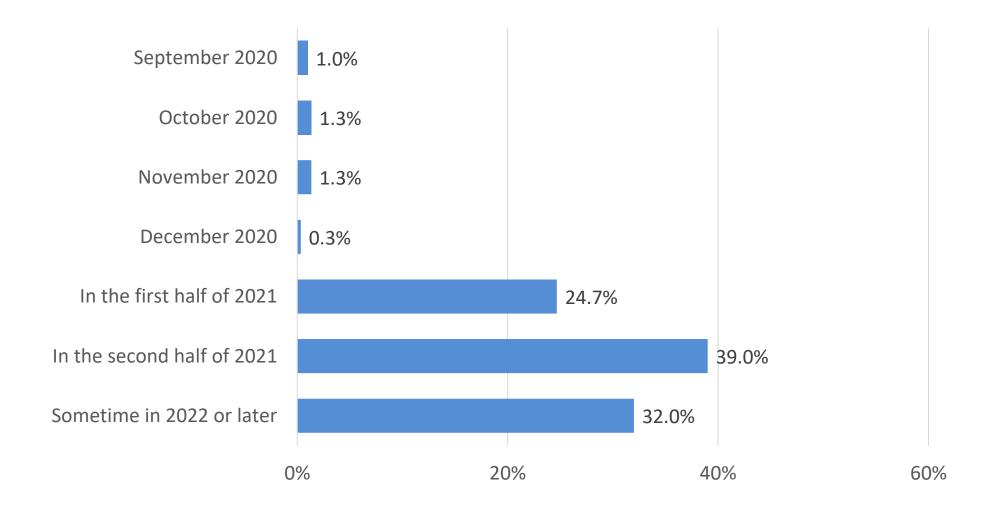
#### WHEN LIVE MEETINGS WILL LIKELY RETURN



Question: If you were advising on the timing of holding a live/in-person meeting or event, which month would you say is the soonest they should consider holding their live event? (Select one) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### WHEN MEETINGS BUSINESS WILL RETURN TO NORMAL



Question: If you had to predict, in which month do you think the meetings and events business will return to normal (or near normal) levels? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### FIRST GROUPS TO RETURN TO LIVE EVENTS

Sports groups or sporting organizations	6				32.7%	
Corporate—Private sector businesses	5				31.7%	
Religious organizations	5			27	7.0%	
Government	t 🔤			19.0%		
Hobby—Social organizations	5		18	8.0%		
Regional Association	1		17.0	)%		
State Association	1		15.7%			
Military	/		14.7%			
Reunions	5	1	3.7%			
Incentives	5	10.0%				
National Association	1	9.3%				
Non-profit—Charity	/	8.3%				
School groups	5	7.7%				
Fraternal organizations	6	5.0%				
thnic/Multicultural groups or associations	3.7%	, D				
International Association	n <b>2.7%</b>					
I don't know/Uncertair	1			20.7%		
	0%	10%	20	)%	30%	4

Question: Which types of these groups do you think will be THE FIRST TO COME BACK to live events? (Select all that apply) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



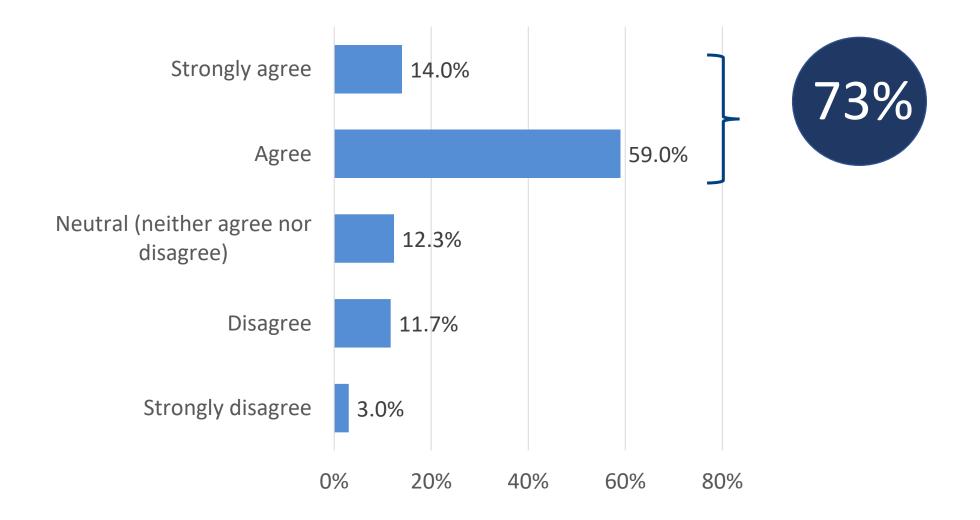
#### SLOWEST GROUPS TO RETURN TO LIVE EVENTS



Question: Which types of these groups will be the SLOWEST TO COME BACK to live events? (Select all that apply) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### SOME LIVE MEETINGS WILL NEVER RETURN

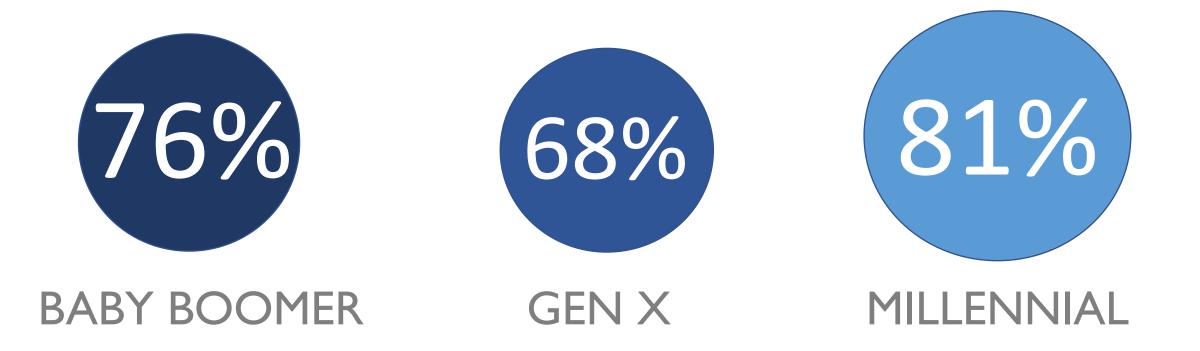


Question: Some companies, organizations and conference/meeting attendees will stick with the benefits of virtual meetings. Some percentage of live meetings will never come back post-pandemic. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### SOME LIVE MEETINGS WILL NEVER RETURN

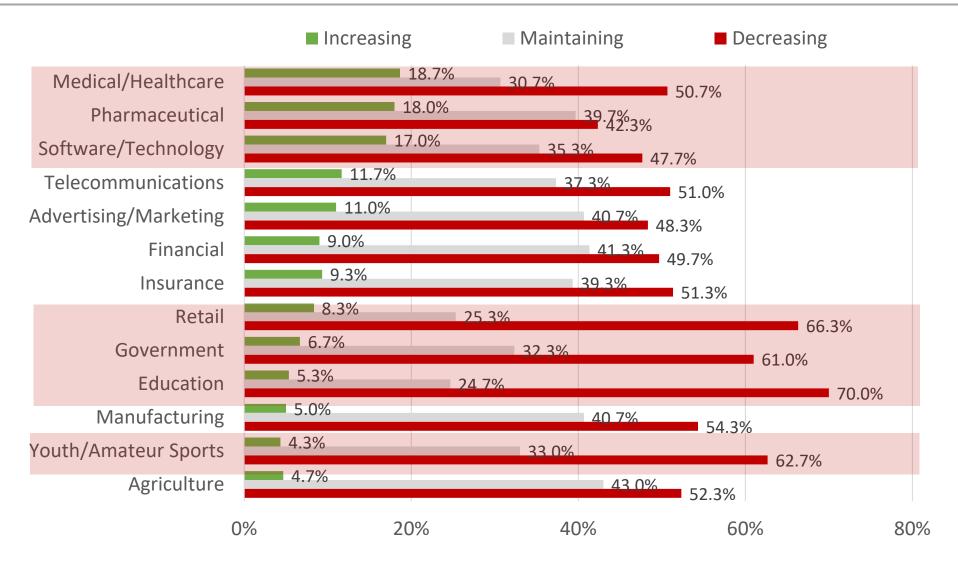
#### TOP-TWO BOX BY PLANNER GENERATION



Question: Some companies, organizations and conference/meeting attendees will stick with the benefits of virtual meetings. Some percentage of live meetings will never come back post-pandemic. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### LIVE EVENT VOLUME BY INDUSTRY



Question: Do you think these industries will be increasing, maintaining or decreasing their live events in 2021? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



## In Their Words

"Right now people are posturing in the space of I'd rather be safe than sorry. But I know that live meetings will rebound because the most critical parts of live meetings is networking and team building which you can't effectively achieve in a virtual setting. Of course, there won't be an immediate onset of business as usual, because people need to be cautious."

"You cannot replace face-to-face. The emotion of it."

"People feel isolated and miss human connection. Now more than ever I think live/in-person meetings and events are going to be more important. This has made people appreciate the face-to-face interaction even more."

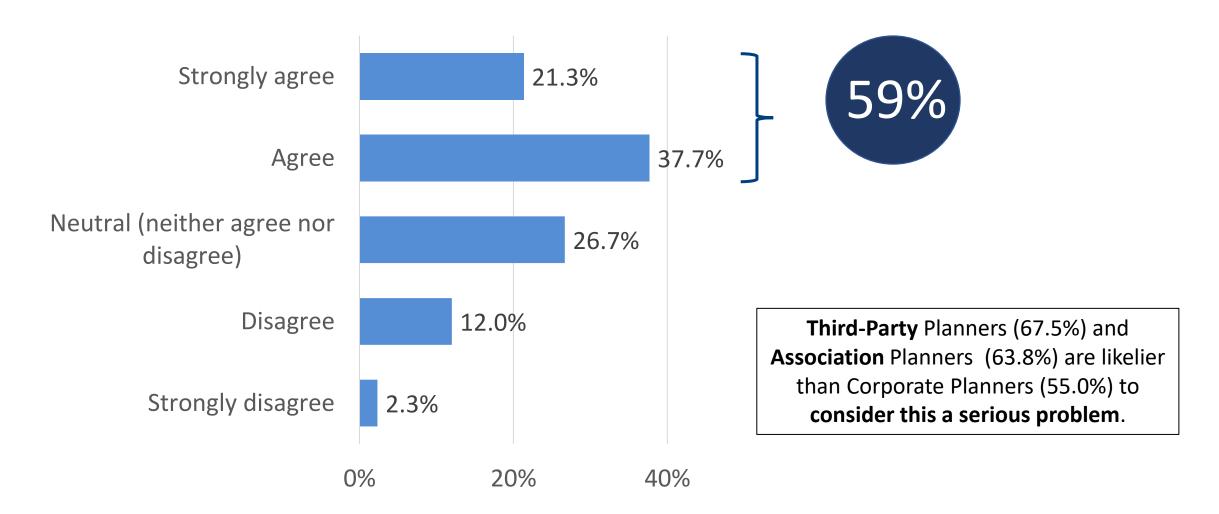
## In Their Words

"I really miss conferences and meetings. Whether it's an internal team retreat to strategize or a customer facing meeting, I miss the social aspect of taking different perspectives and agendas and building a path forward together."

"It's the podcast versus the sound bite. You are going to have a fidelity of information, more trust from a social interaction in person."

"Body language—the communication system we rely on as humans—is far less than perfectly transmitted over digital. And you want the whole picture, and all the data."

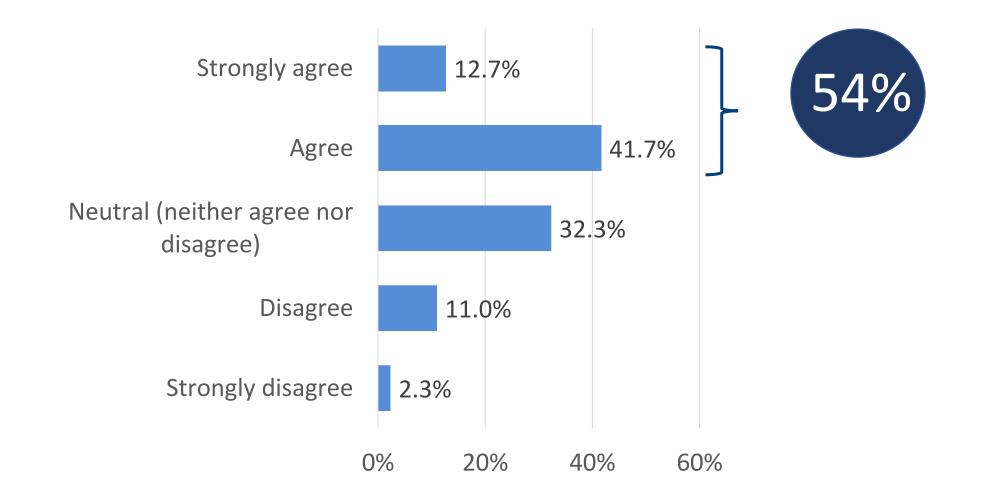
#### FORCE MAJEURE ISSUES ARE A SERIOUS PROBLEM



Question: Dealing with force majeure issues is a serious problem for my organization right now. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



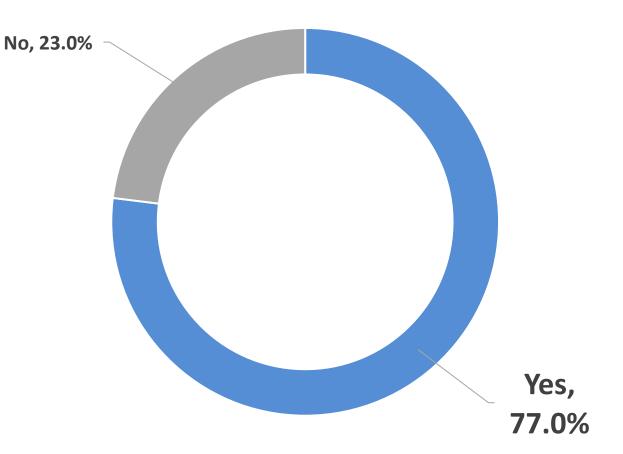
#### MORE NEGOTIATING POWER FOR PLANNERS



Question: The coronavirus pandemic will end up giving more negotiating power to meeting and event planners and less to hotels. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### NEW CONSIDERATIONS FOR MEETINGS



Question: For these meetings, are you being asked to do anything now that you were not being asked to do before the Coronavirus situation? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample Size = 165



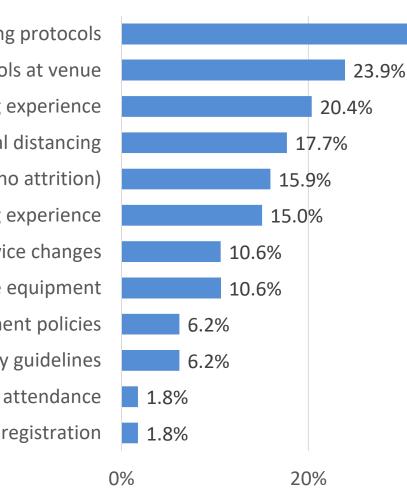
#### NEW REQUESTS FOR MEETINGS (UNAIDED)



31.0%

40%

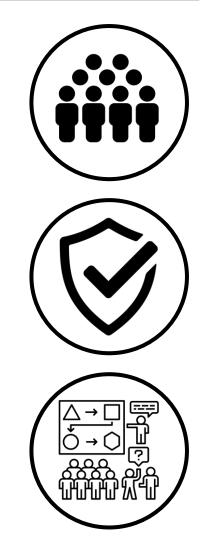


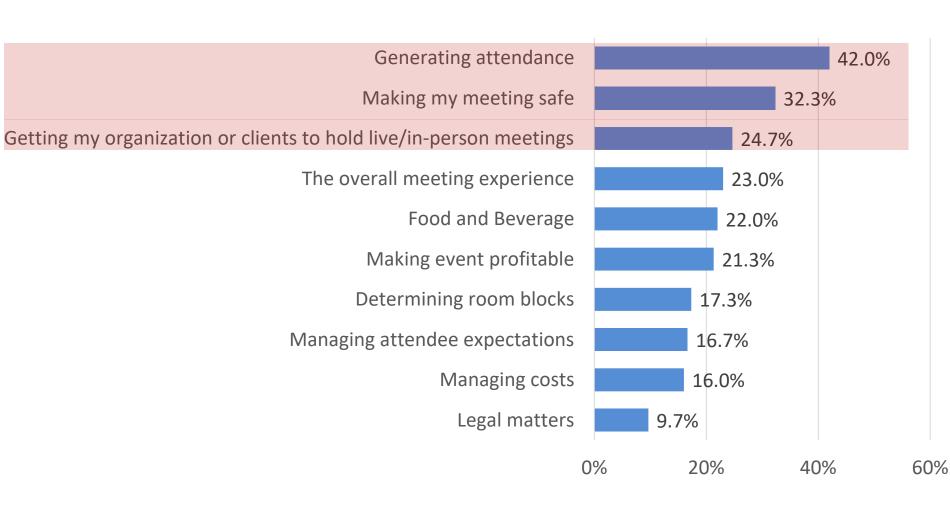


Social distancing protocols Health and safety protocols at venue Full virtual meeting experience Requiring additional meeting space for social distancing Contract changes (force majeure, no attrition) Partial virtual/Hybrid meeting experience Meal service changes Personal protective equipment Cancellation/reimbursement policies Government health and safety guidelines Decrease maximum attendance No-contact registration

Question: (If yes) What are these requests? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample Size = 113

#### MOST CHALLENGING ASPECTS OF LIVE EVENTS



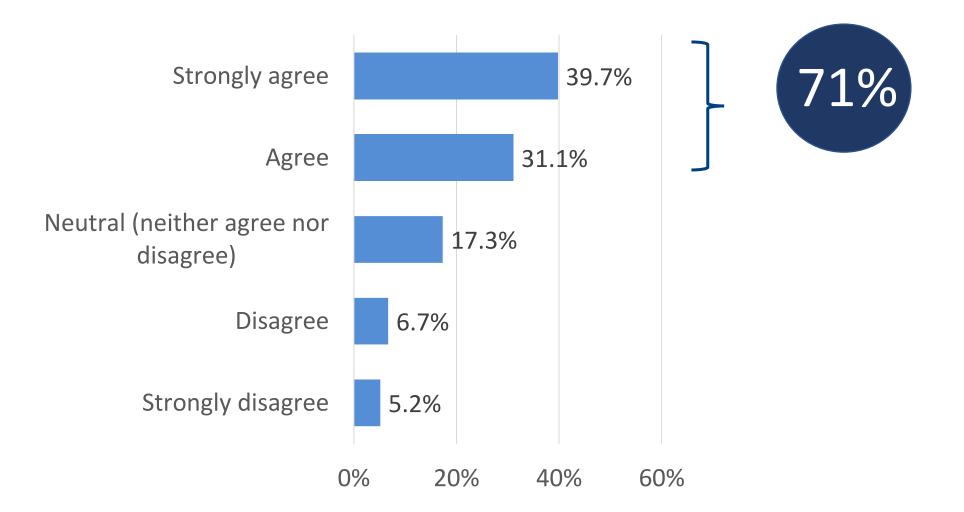


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Question: Which three from the question above do you expect to be MOST CHALLENGING? (Select up to 3) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

# MEETING ATTENDEF SENTIMENT

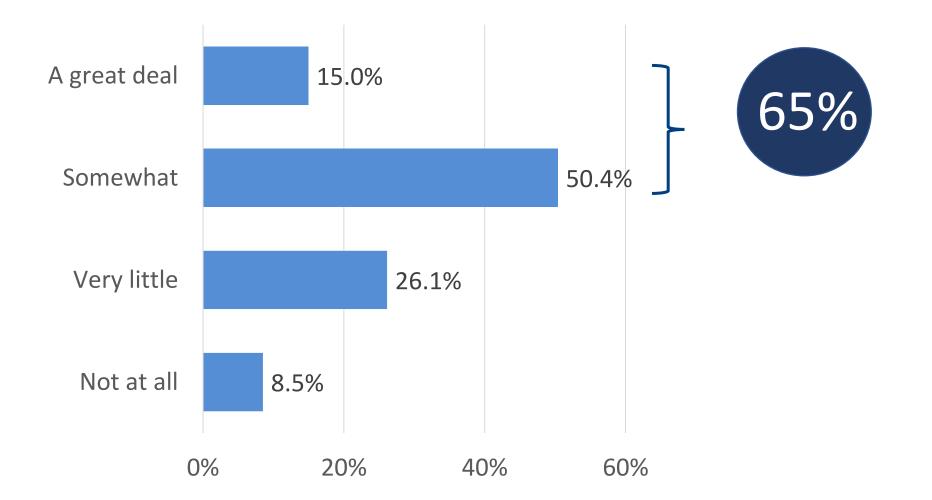
#### UNLIKELY TO ATTEND CONFERENCES UNTIL CORONAVIRUS SITUATION IS RESOLVED



Question: I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers who have attended a conference/convention in past two years. Sample size = 378



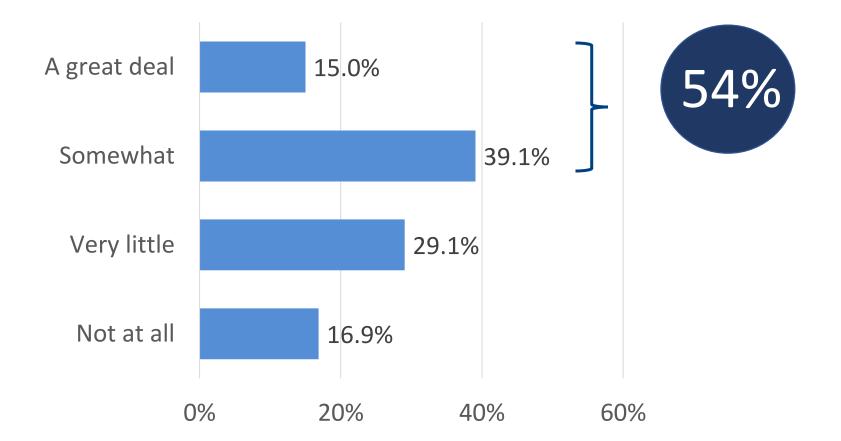
#### TRUST IN HOST ORGANIZATION TO BE SAFE



Question: In general, how much would you trust the organization hosting the conference or convention to look out for your health? I would trust the hosting organization \_\_\_\_\_\_. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers who have attended a conference/convention in past two years. Sample size = 378



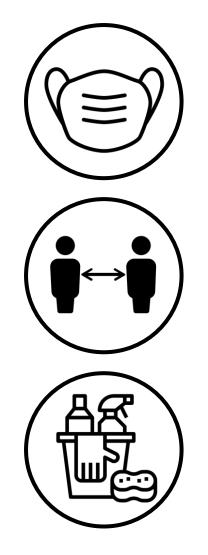
#### TRUST IN FELLOW ATTENDEES TO BE SAFE

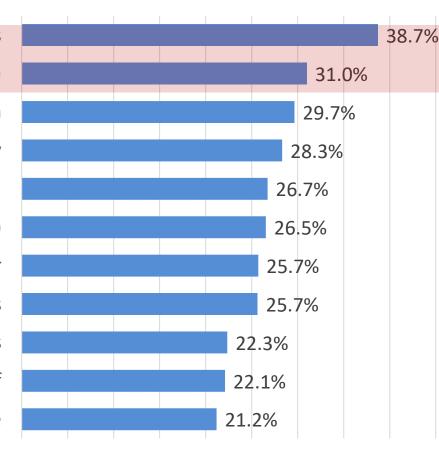


Question: Suppose you were to attend a conference or convention sometime in the next year. In general, how much would you trust your fellow attendees to conduct themselves appropriately, doing what they can to protect other attendees from exposure to the COVID-19 virus? I trust my fellow attendees \_\_\_\_\_\_. Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers who have attended a conference/convention in past two years. Sample size = 378



#### TOP DESIRED OPERATIONAL PRACTICES FOR MEETINGS





 $0\% \quad 5\% \quad 10\% \ 15\% \ 20\% \ 25\% \ 30\% \ 35\% \ 40\% \ 45\%$ 

Required mask/face coverings for all attendees Social distancing enforced (minimum 6 feet) Enhanced cleaning and sanitation Attendance limited to 50% of the event space capacity Cleaning between every meeting/session Spaced seating for social distancing (minimum 6 feet) Provide hand sanitizer Provide masks Temperature checks for attendees Required PPE use for all event staff Meetings/events held outdoors as much as possible



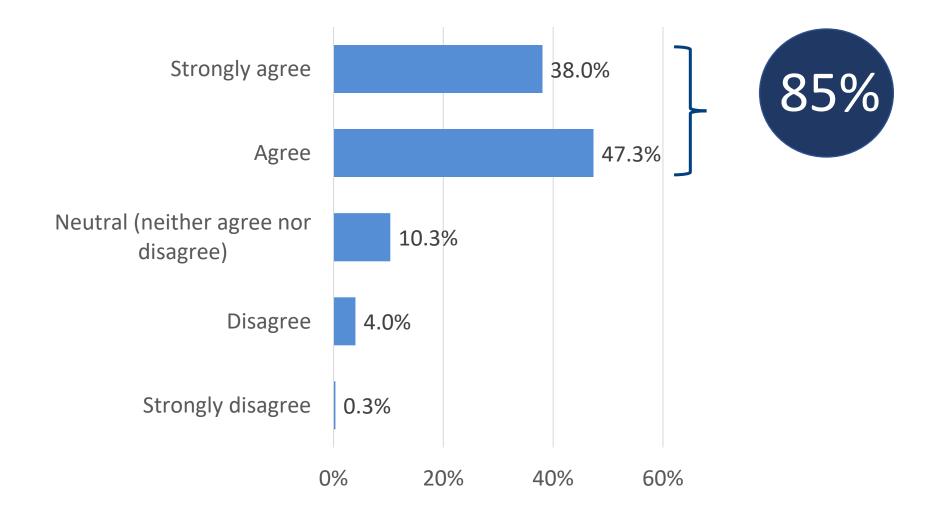
Question: When attending a live event or conference in the future, which operational practices would make you feel most confident that the organization hosting the conference/event is looking after your health? (PLEASE SELECT AT MOST FIVE) Source: Destination Analysts Coronavirus Travel Sentiment Index Study. Base: American travelers who have attended a conference/convention in past two years. Sample size = 378

# In Their Words

"And though I yearn to receive energy from my colleagues and clients, I am hesitant to actually do so until it is clearly safe. It is important to move through this period with caution and patience."

> "Because face-to-face is so important, the pandemic is actually going to make us enter a period of conservation for these. Honestly, I saw a lot of people using this kind of travel to escape from their spouse or everyday life before. And that's not going to happen again for awhile, to preserve the importance."

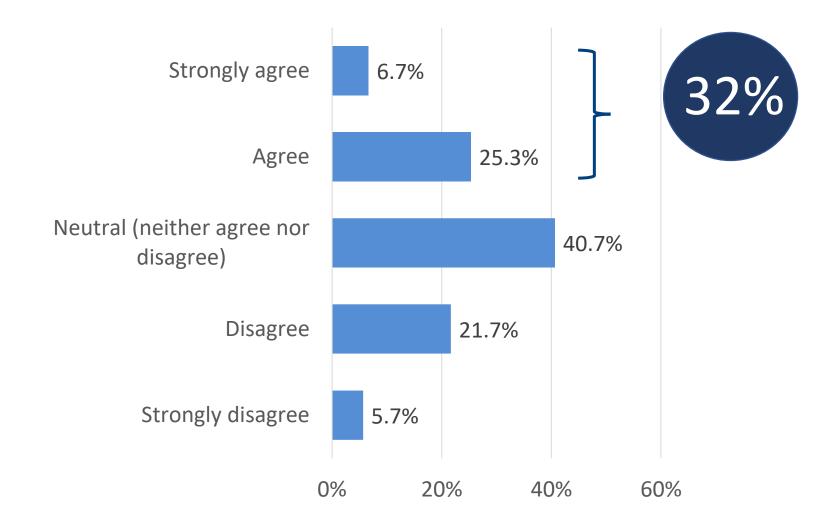
#### SOCIAL DISTANCING AT LIVE MEETINGS WILL BE CHALLENGING



Question: Enforcing social distancing among attendees will be extremely challenging for the live meetings I plan. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### LIKELIER TO USE MULTIPLE HOST PROPERTIES



Question: For live meetings, I am more likely to use multiple host hotels/properties to account for capacity limitations. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### LIKELIER TO USE MULTIPLE HOST PROPERTIES

#### TOP-TWO BOX BY PLANNER TYPE



## CORPORATE THIRD-PARTY ASSOCIATION

Question: For live meetings, I am more likely to use multiple host hotels/properties to account for capacity limitations. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### LIKELIER TO USE MULTIPLE HOST PROPERTIES

#### TOP-TWO BOX BY PLANNER GENERATION



### BABY BOOMER C

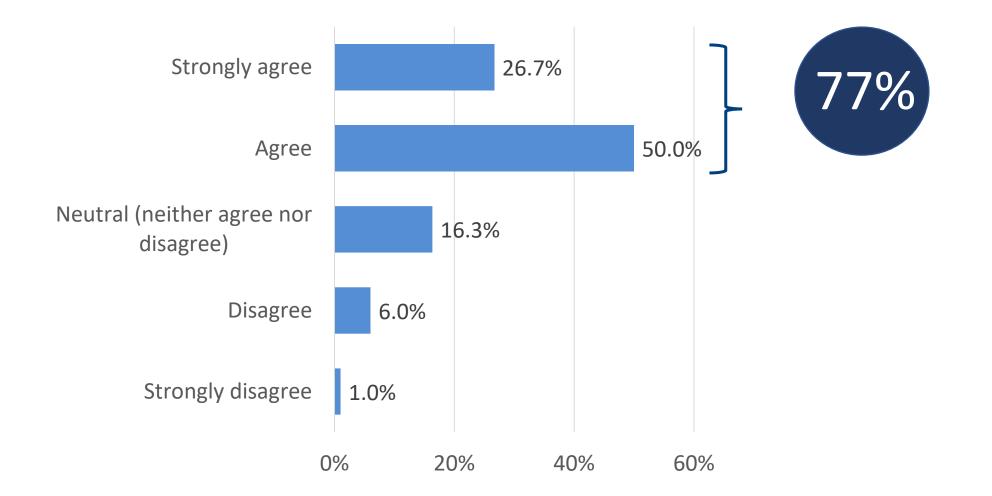
GEN X

MILLENNIAL

Question: For live meetings, I am more likely to use multiple host hotels/properties to account for capacity limitations. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### VIRTUAL/LIVE HYBRID MEETINGS WILL BE THE NORM

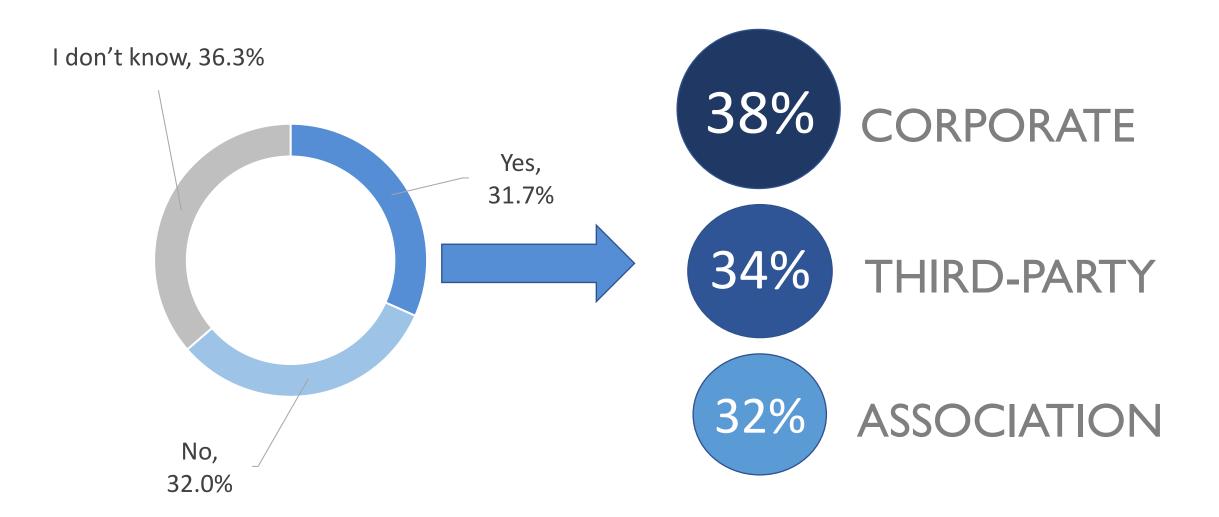


Question: Virtual/Live hybrid meetings will be the norm for the next year. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



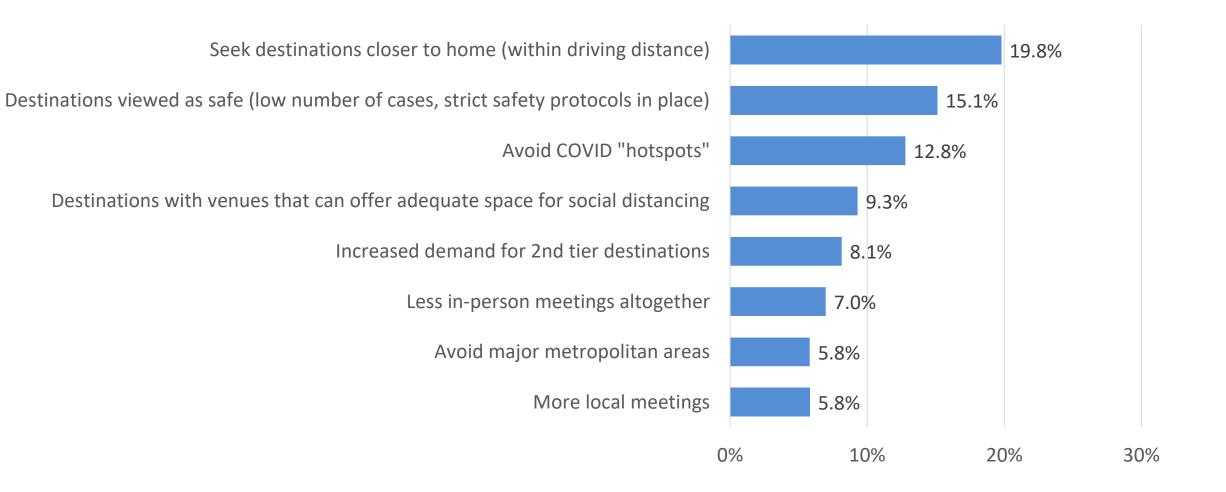
## MARKETING YOUR DESTINATION FOR MEETINGS

#### CHANGES IN DESTINATIONS SOURCED (NEXT 12 MONTHS)





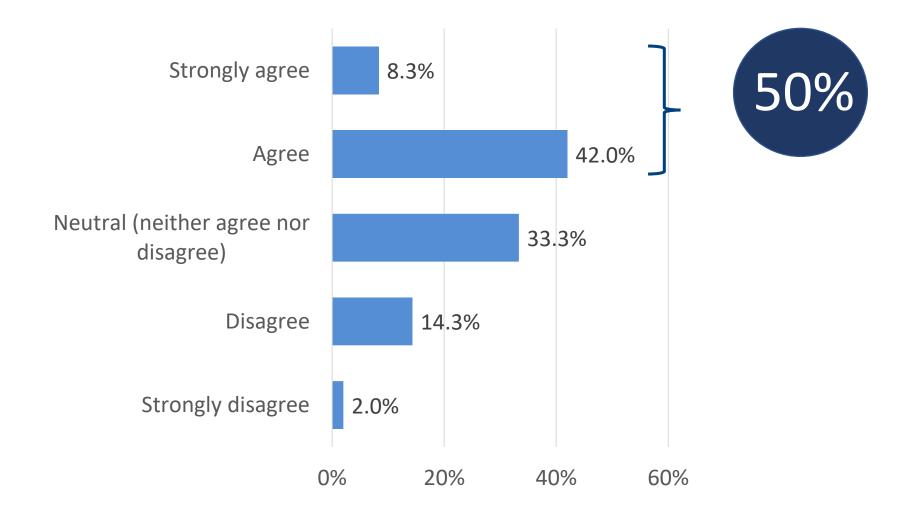
### HOW SOURCING WILL CHANGE (UNAIDED)



Destination  $\bigoplus_{\text{Do your Research}} Analysts$ 

Question: In a few words, how will this change? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 86

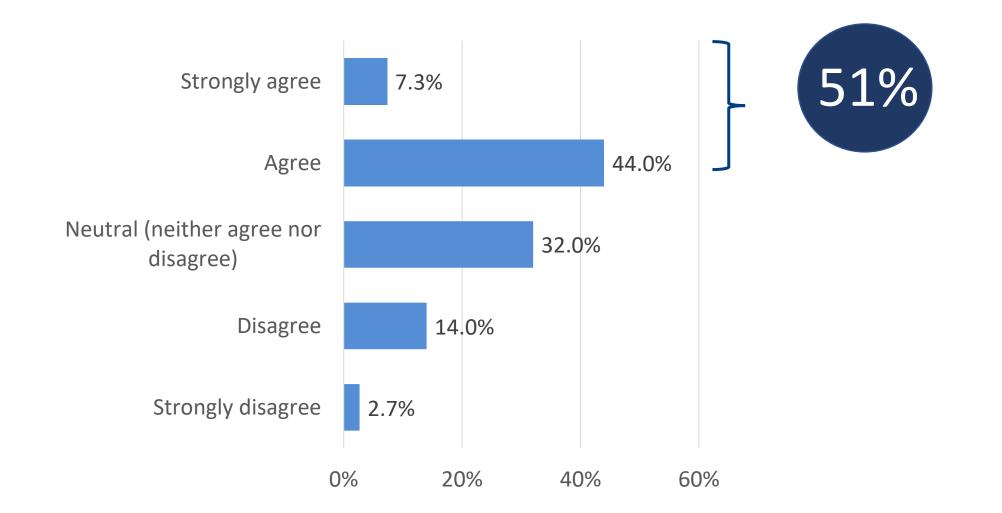
#### BEACH DESTINATIONS HAVE A GREATER OPPORTUNITY



Question: Due to lingering fears, beach destination and resorts will have an opportunity they might not have had before to attract meetings and events business in the post-pandemic period. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



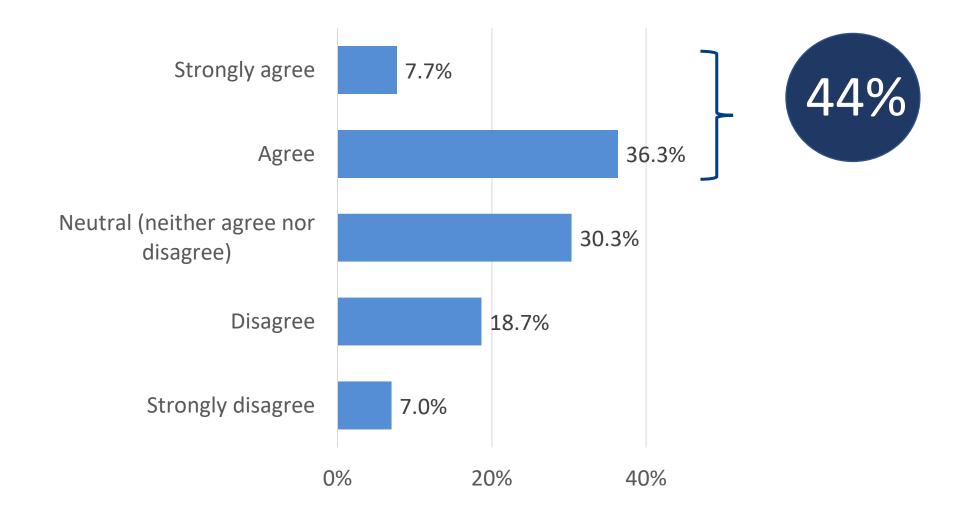
#### SMALLER TOWNS HAVE A GREATER OPPORTUNITY



Question: Due to lingering fears, smaller towns or rural destinations will have an opportunity they might not have had before to attract meetings and events business in the post-pandemic period. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



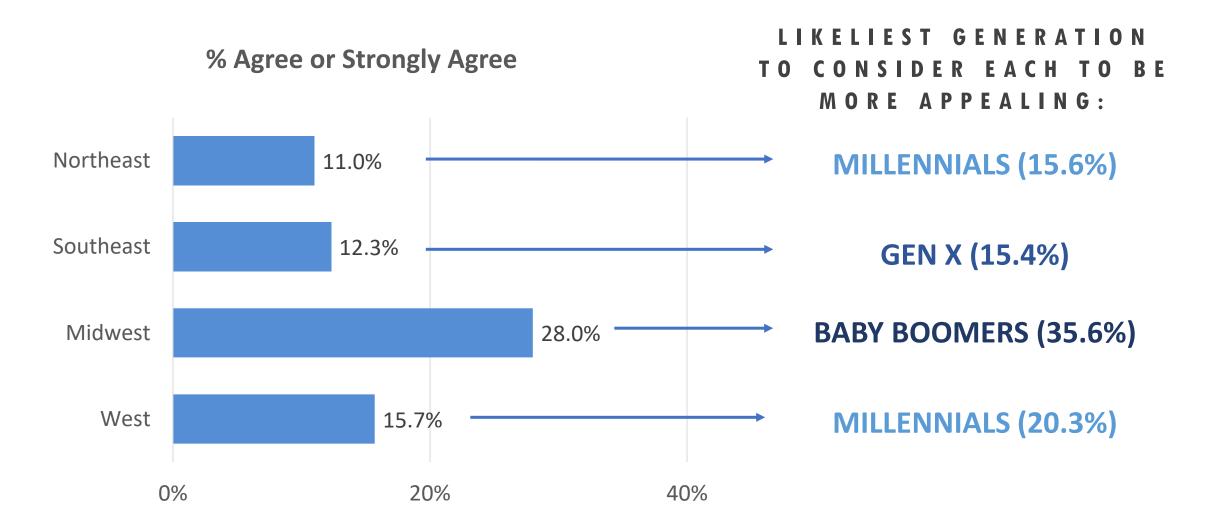
#### BIG CITIES ARE STILL IN THE CONSIDERATION SET



Question: In the current environment, I would still consider hosting my meetings/events in big cities/metropolitan areas. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



### REGIONS MORE ATTRACTIVE FOR MEETINGS NOW

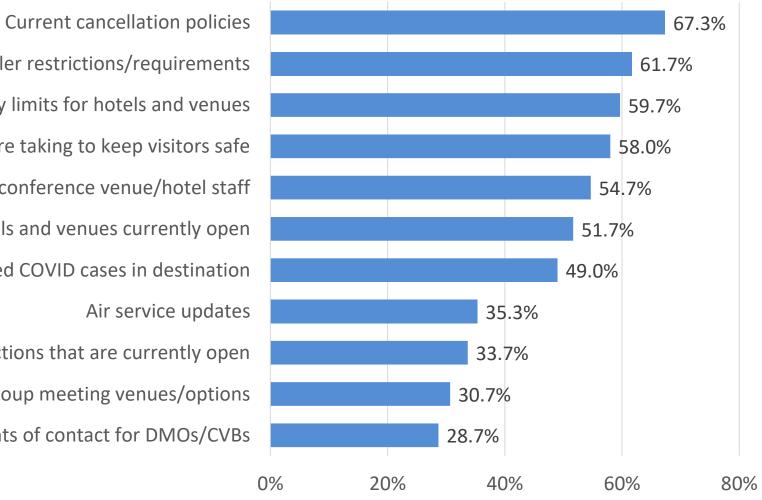


Question: The US Northeast is a more attractive region for meetings now. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



## Meeting Planners Generally Feel the Geographic Region that they are Personally Located in is More Attractive Right Now

### INFORMATION SOUGHT IN DESTINATION ADS



Out-of-state traveler restrictions/requirements Updated capacity limits for hotels and venues Information about actions destinations are taking to keep visitors safe Health screening protocols for frontline conference venue/hotel staff List of hotels and venues currently open Number of confirmed COVID cases in destination Air service updates Local businesses and attractions that are currently open Outdoor group meeting venues/options Updated points of contact for DMOs/CVBs

Destination Analysts

Question: What information do you want communicated or advertised to you right now? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300

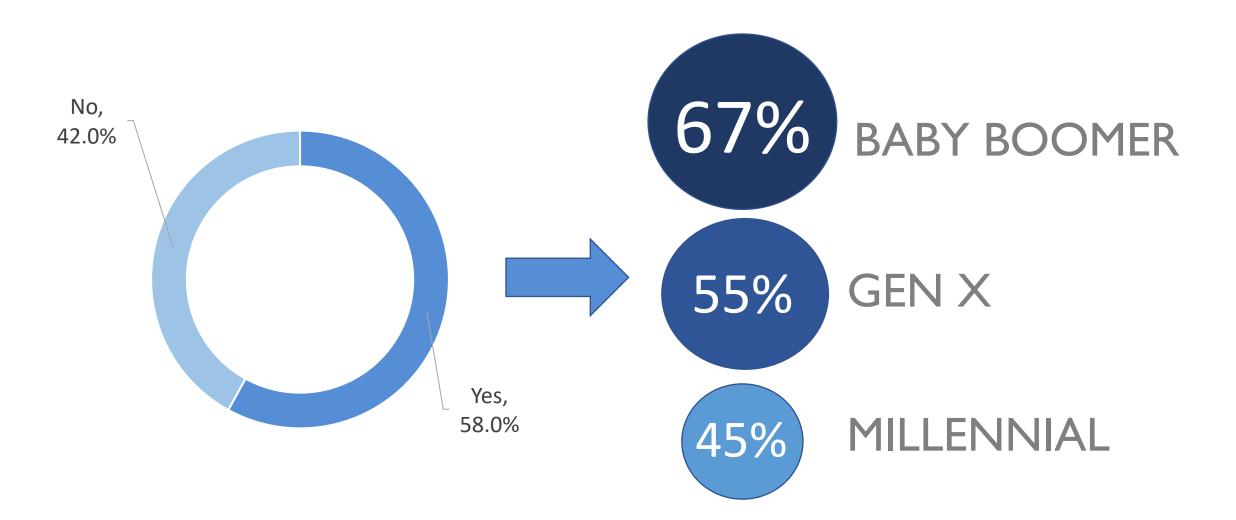
## In Their Words

"Being a true partner to us should priority number 1 for CVBs. The health and well being of attendees is a meeting planners first priority, so being a partner to us means that CVBs are helping us navigate this situation and helping us communicate to our attendees that it is safe to come to their destinations and show why it is safe."

"The single piece of communication that would help planners most now is a quick blast with information on the status of the reopening and what that means--what number of people are allowed to gather in their destination? How is social distancing requirements reducing capacity? Which venues/cities are requiring masks?"

"Most important information CVBs can give us is a clear look at what their safety policy and procedures look like. What measures do you have in place right now? What will your city/airport/transportation in-market look like now? A list of hotel closures and reopenings on a weekly basis--if all CVBs could do that, it would be priceless."

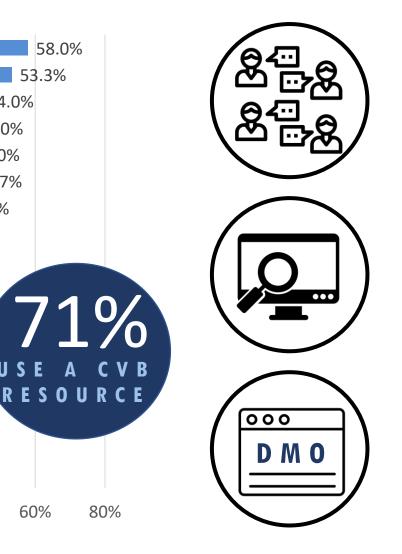
#### TAKING ADVANTAGE OF PRICE CUTS



Question: The Coronavirus has led many travel providers (hotels, airlines, etc.) to cut their prices. Do you expect to take advantage of this situation for your meetings during the next twelve months? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



### MEETINGS DESTINATION RESEARCH RESOURCES





Question: Which of the following resources do you regularly access when researching destinations in which to hold meetings or events? (Please only select those that you consider the most important sources.) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### MEETINGS DESTINATION RESEARCH RESOURCES

#### **BY PLANNER TYPE**

- Corporate planners more likely to use hotel corporate sales offices (45.0% vs. 33.8% for Third-party and 40.9% for Association planners).
- Association and third-party planners are similarly likely to use CVB hosted events and a contact at a CVB for destination research.
- Third-party planners are more likely to also turn to CVENT (45.0%)
- Association planners are likelier to turn to trade websites (22.8%)

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### MEETINGS DESTINATION RESEARCH RESOURCES

#### **BY PLANNER GENERATION**

#### • Millennial planners are:

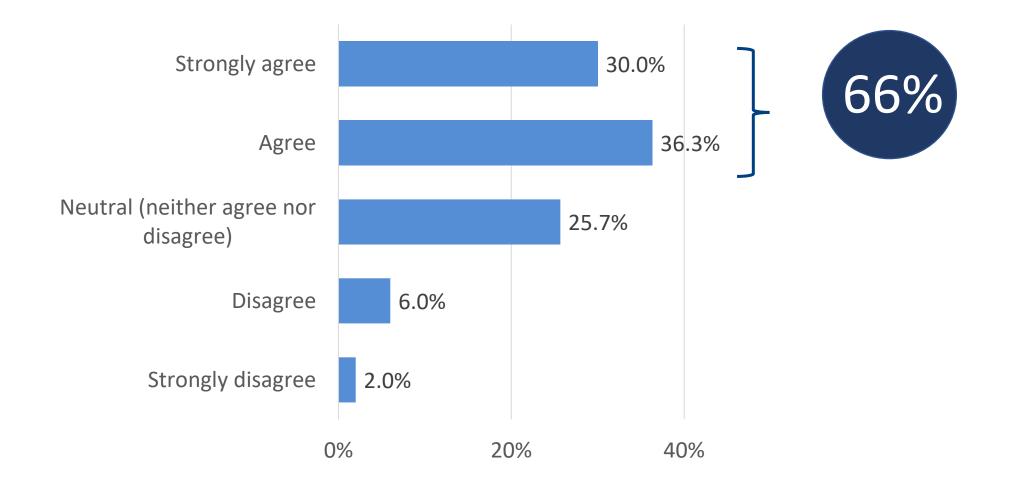
- Much less likely to rely on CVB hosted events such as FAM trips (15.6% vs. 45.4% for Gen X and 49.5% for Boomers)
- More likely to use social media sites (23.4% vs. 16.9% for Gen X and 17.8% for Boomers)
- **Baby Boomers** are much more likely to use **print resources** such as:
  - Meeting Planner Guide published by CVB (38.6%)
  - Trade magazines or other trade publications (35.6%)
  - **Travel magazines** and/or travel magazine websites (32.7%)
  - **Printed official visitor guides** (15.8%)

Question: Which of the following resources do you regularly access when researching destinations in which to hold meetings or events? (Please only select those that you consider the most important sources.) Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



## HOW CVBS CAN REACH MEETING PLANNERS

### CVBS ARE AN IMPORTANT RESOURCE



Question: For my work, Convention & Visitors Bureaus will be an important resource for doing business in the pandemic period. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### CVBS ARE AN IMPORTANT RESOURCE

#### TOP-TWO BOX BY PLANNER TYPE



## CORPORATE THIRD-PARTY

ASSOCIATION

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#### CVBS ARE AN IMPORTANT RESOURCE

TOP-TWO BOX BY PLANNER GENERATION



### BABY BOOMER GEN X

MILLENNIAL

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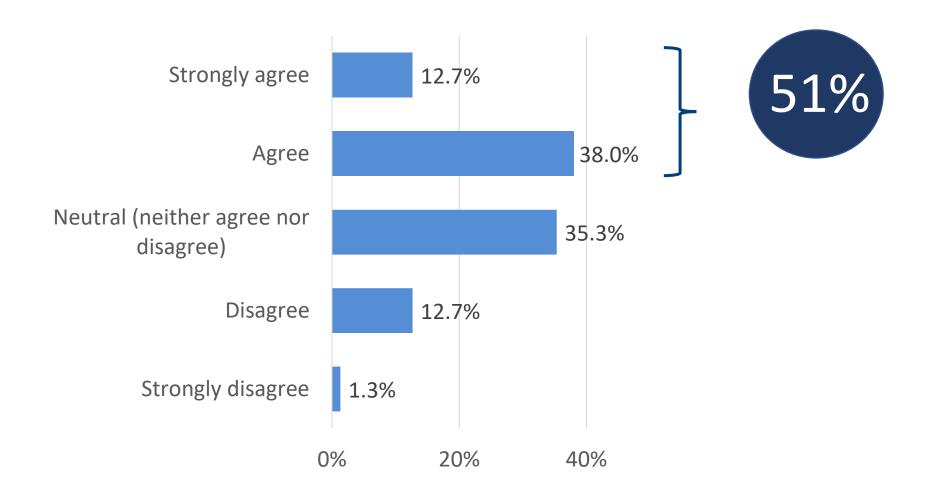
# In Their Words

"CVBs could help us most by facilitating negotiations between planners and hotels in their cities. Make it easier for us to re-book current business. Having them at the table to help would be instrumental."

"CVBs need to do more than just market their destinations, I need them connect the dots between me and the providers in their city. Also, if they can look at their book of business that is upcoming and be more proactive about connecting with planners and offering help with re-bookings, etc. It sometimes feels like we are out here on our own right now."

> "Continue to be available for us when we need you. Like how to reach you via zoom chat during certain hours and dates. Giving planners an opportunity like this to talk to someone at the CVB is forward thinking and pretty smart."

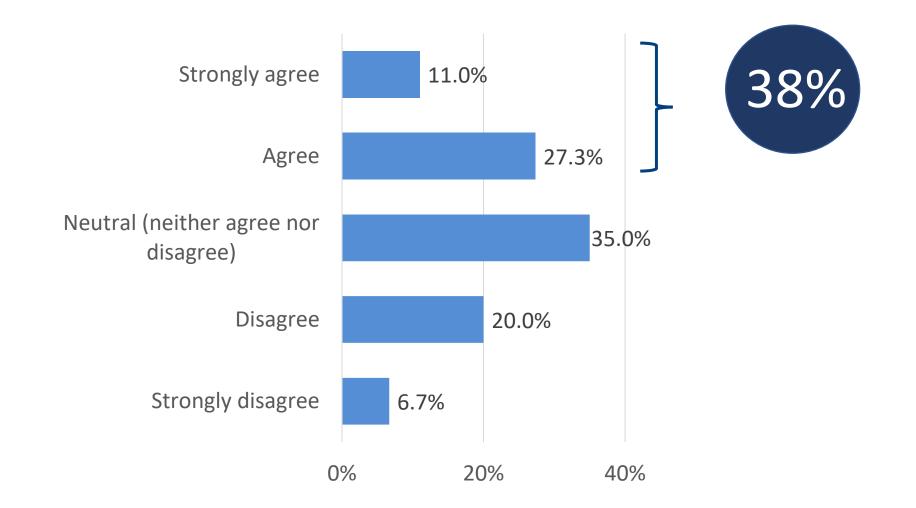
### FINANCIAL ISSUES CVBS FACE WILL MAKE HAVING SUCCESSFUL MEETINGS MORE DIFFICULT



Question: I expect the financial issues Convention & Visitors Bureaus are having due to the pandemic will generally make having successful meetings and events more difficult. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



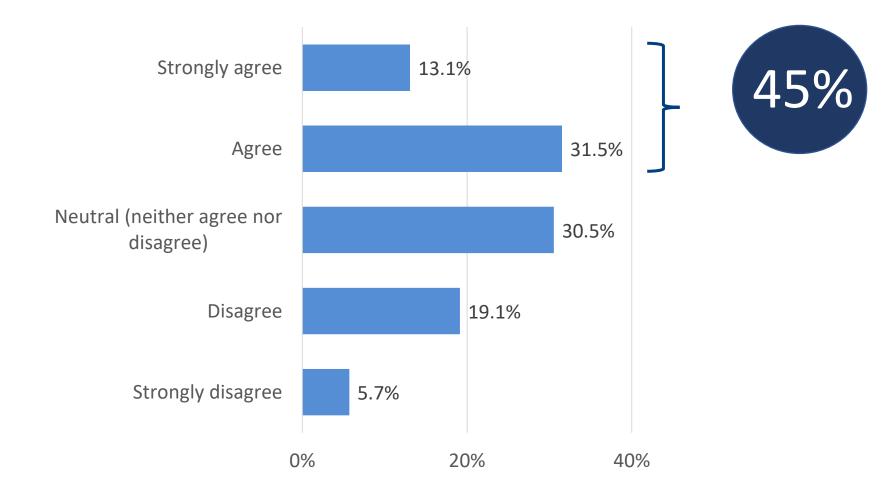
### EXPECT CVBS TO ASSIST IN PROVIDING PPE



Question: I expect Convention & Visitors Bureaus to assist with providing PPE (personal protective equipment such as masks and gloves) to my live meeting attendees. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



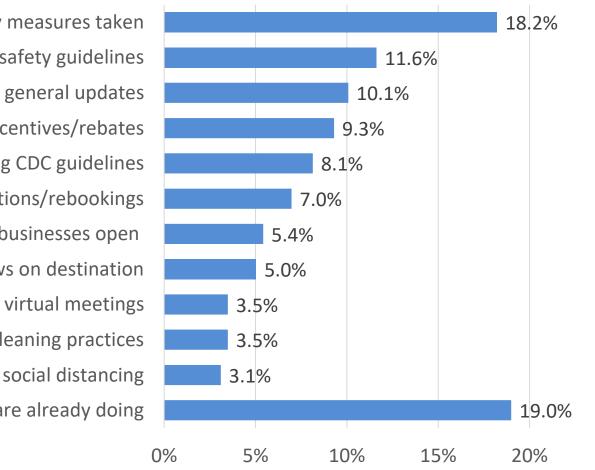
#### CVBS PLAY A HELPFUL ROLE, EVEN WITH VIRTUAL EVENTS



Question: Convention & Visitors Bureaus can still play a helpful role to meeting planners, even when a meeting/event is virtual. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



### MOST SOUGHT CVB SERVICES (UNAIDED)

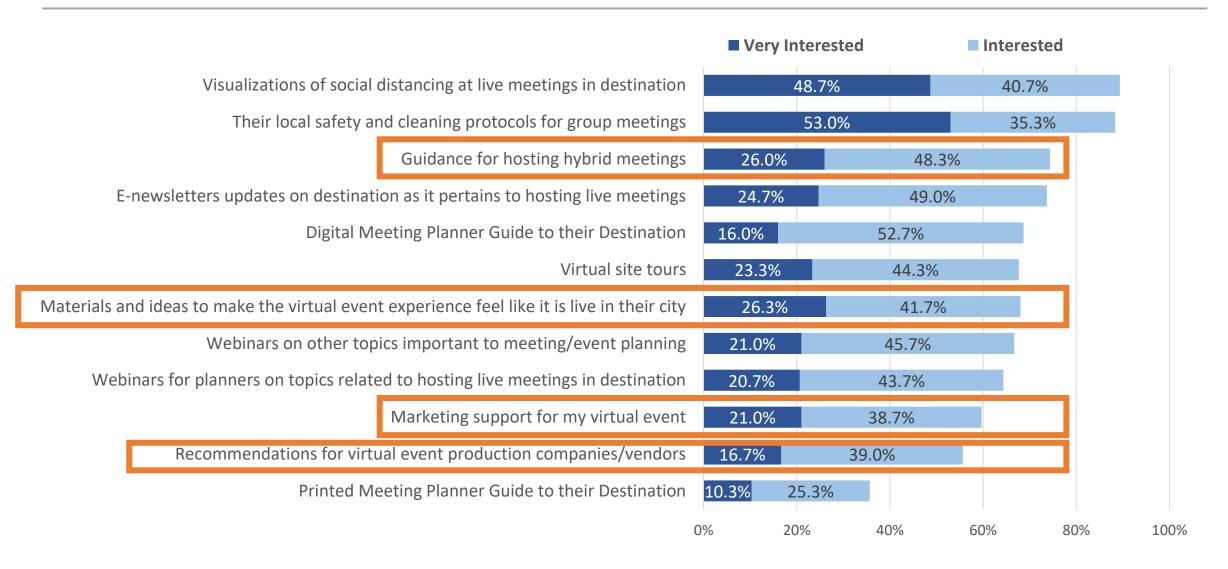


Destination

- Provide information on safety measures taken Communicate local health and safety guidelines Provide general updates Provide Incentives/rebates Provide list of venues/businesses following CDC guidelines Assist with contract negotiations/cancellations/rebookings Share list of businesses open Share COVID-related news on destination Assist with virtual meetings Share details on cleaning practices Provide list of venues that can accommodate space needed for social distancing
  - Not sure / no more than they are already doing

Question: What services should Convention & Visitors Bureaus focus on providing to help you during the remainder of 2020? Please be as descriptive as possible. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 258

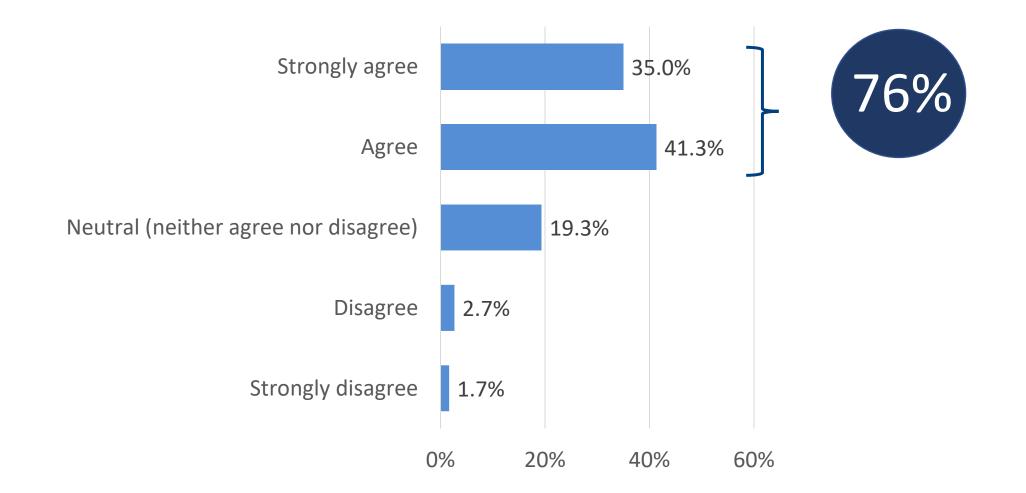
### CVB RESOURCES OF INTEREST (AIDED)



Question: How interested would you be in each of the following from Convention and Visitors Bureaus: Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### CVBS PUBLISHING HOTEL AVAILABILITY IS VALUABLE



Question: Convention & Visitors Bureaus publishing information on local hotel re-openings and upcoming availability would be of high-value right now. Sample size= 300



# In Their Words

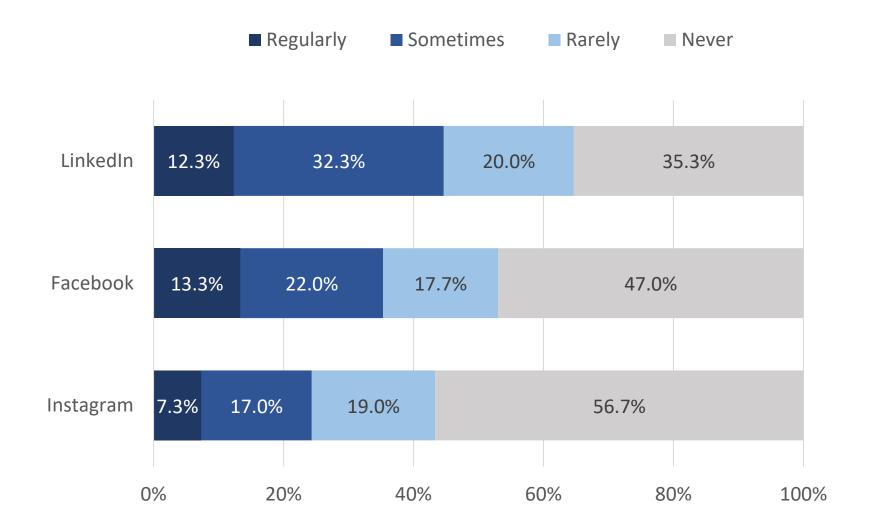
"The CVBs (that clearly stand out to me) have been consistent in their messaging."

"The most memorable messages from CVBs were highlighting no cancellation fees and no attrition for meetings hosted in 2020"

"The most useful CVB webinar I attended included other meeting planners who have adapted to a virtual environment, and who shared their experiences and advice on how to successfully do so."

> "A good way to get more engagement from planners to attend webinars would be offer incentives like giveaways."

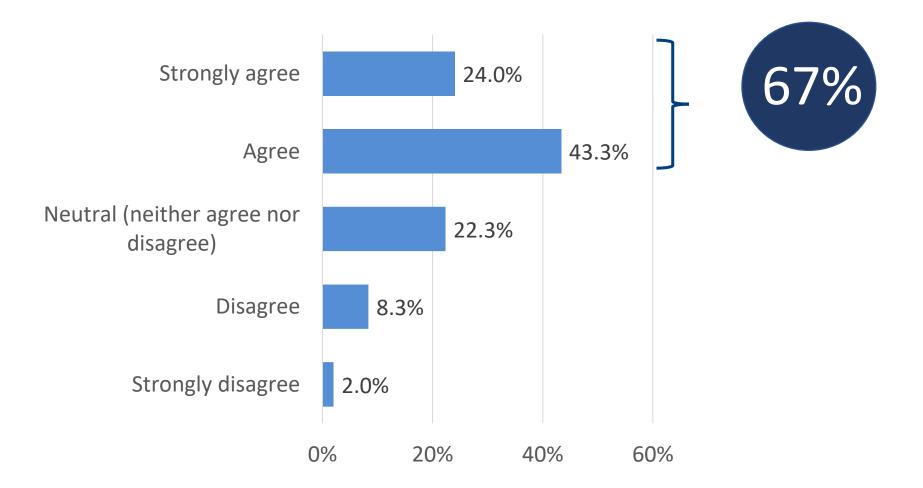
#### ENGAGING WITH CVBS ON SOCIAL CHANNELS



Question: How often do you use these social channels to engage with Convention and Visitors Bureaus content? Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



#### IT'S IMPORTANT FOR CVBS TO CONTINUE PROMOTING THEIR DESTINATIONS IN 2020



Question: It is important that Convention & Visitors Bureaus advertise and promote their destinations to meeting planners through the remainder of the year. Source: Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample size = 300



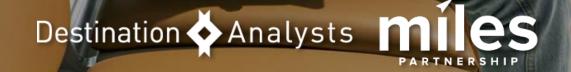
## DOWNLOAD THE SUMMARY OF FINDINGS HERE:

## DESTINATIONANALYSTS.COM/2020MEETINGS

THE STATE OF THE AMERICAN TRAVELER **TECHNOLOGY AND** TRAVELER SEGMENTS EDITION – IN AN AGE OF COVID-19

WEDNESDAY, SEPTEMBER 2, 3PM ET

Register at: bit.ly/3fggbEK



## Join Us

Americans + Travel in the Period of Coronavirus Weekly Update from our ongoing Coronavirus Travel Sentiment Index Study Every Tuesday at 11:00am EST on Zoom Register at DestinationAnalysts.com

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