

CORONAVIRUS TRAVEL SENTIMENT INDEX

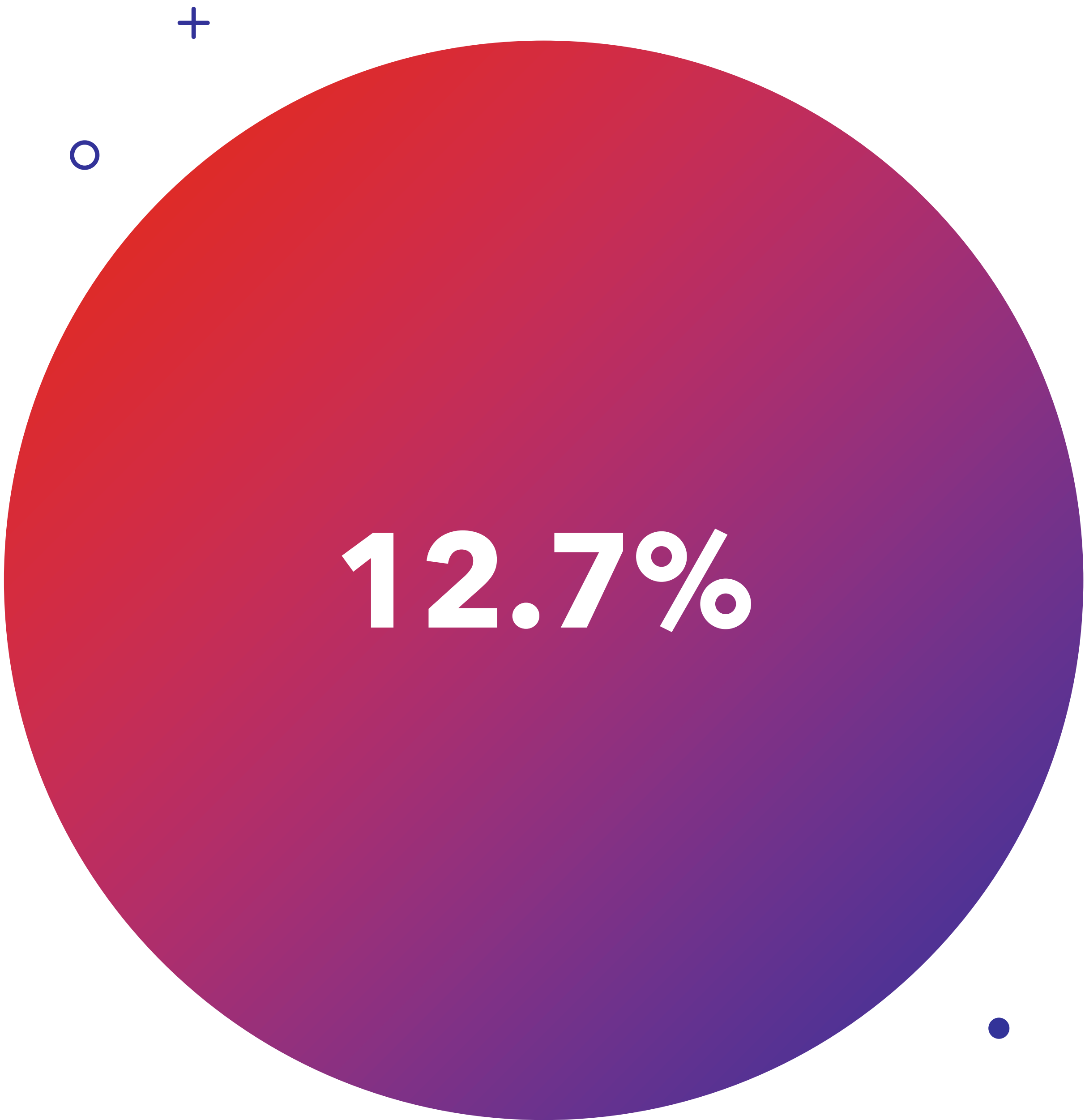
PRESENTATION OF LATEST FINDINGS

February 16th, 2021

Destination  Analysts







Traveled for the
President's Day Weekend

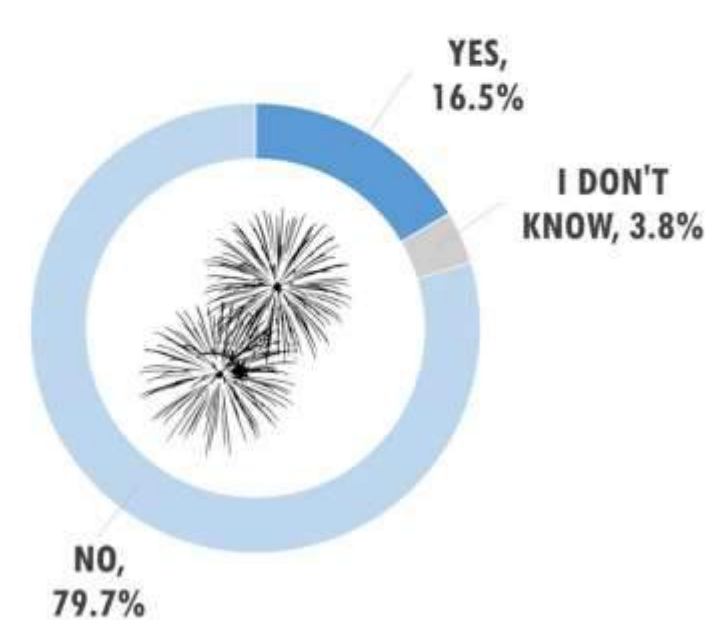
HOLIDAY TRAVEL DURING THE COVID-19 PANDEMIC: AS OF FEBRUARY 14, 2021

MEMORIAL DAY WEEKEND



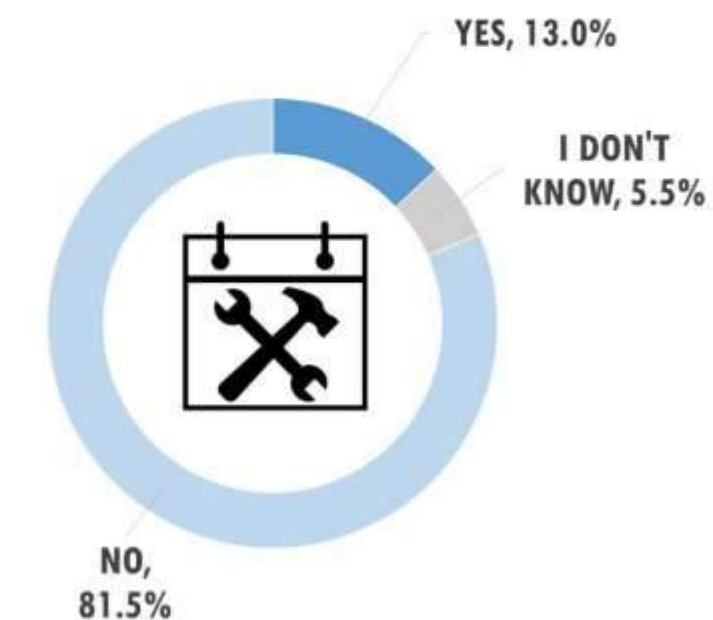
(Base: Wave 11. All respondents, 1,223 completed surveys. Data collected May 22-24, 2020)

FOURTH OF JULY WEEKEND



(Base: Wave 17 data. All respondents, 1,363 completed surveys. Data collected July 3-5, 2020)

LABOR DAY WEEKEND



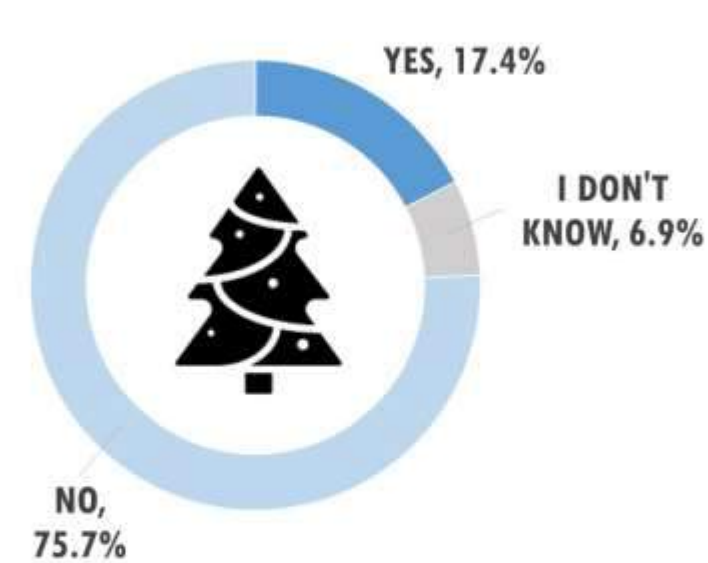
(Base: Wave 26 data. All respondents, 1,225 completed surveys. Data collected September 4-6, 2020)

THANKSGIVING



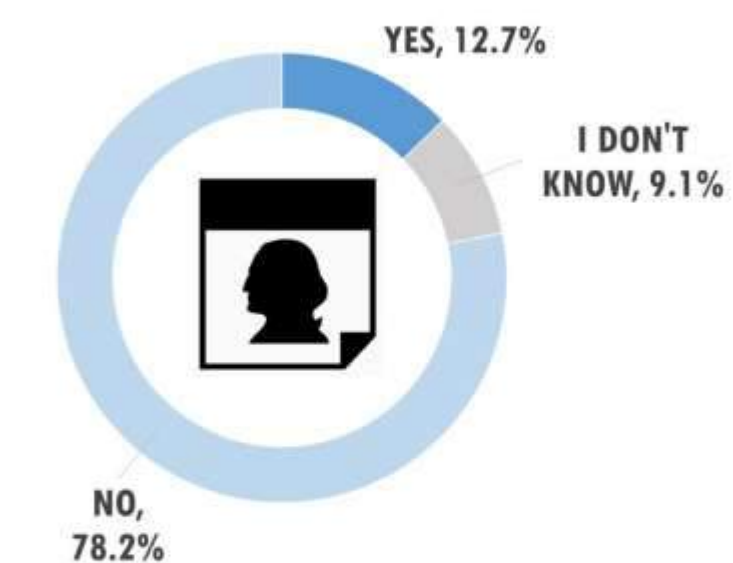
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)

CHRISTMAS



(Base: Wave 41 data. All respondents, 1,201 completed surveys. Data collected December 18-20, 2020)

PRESIDENT'S DAY



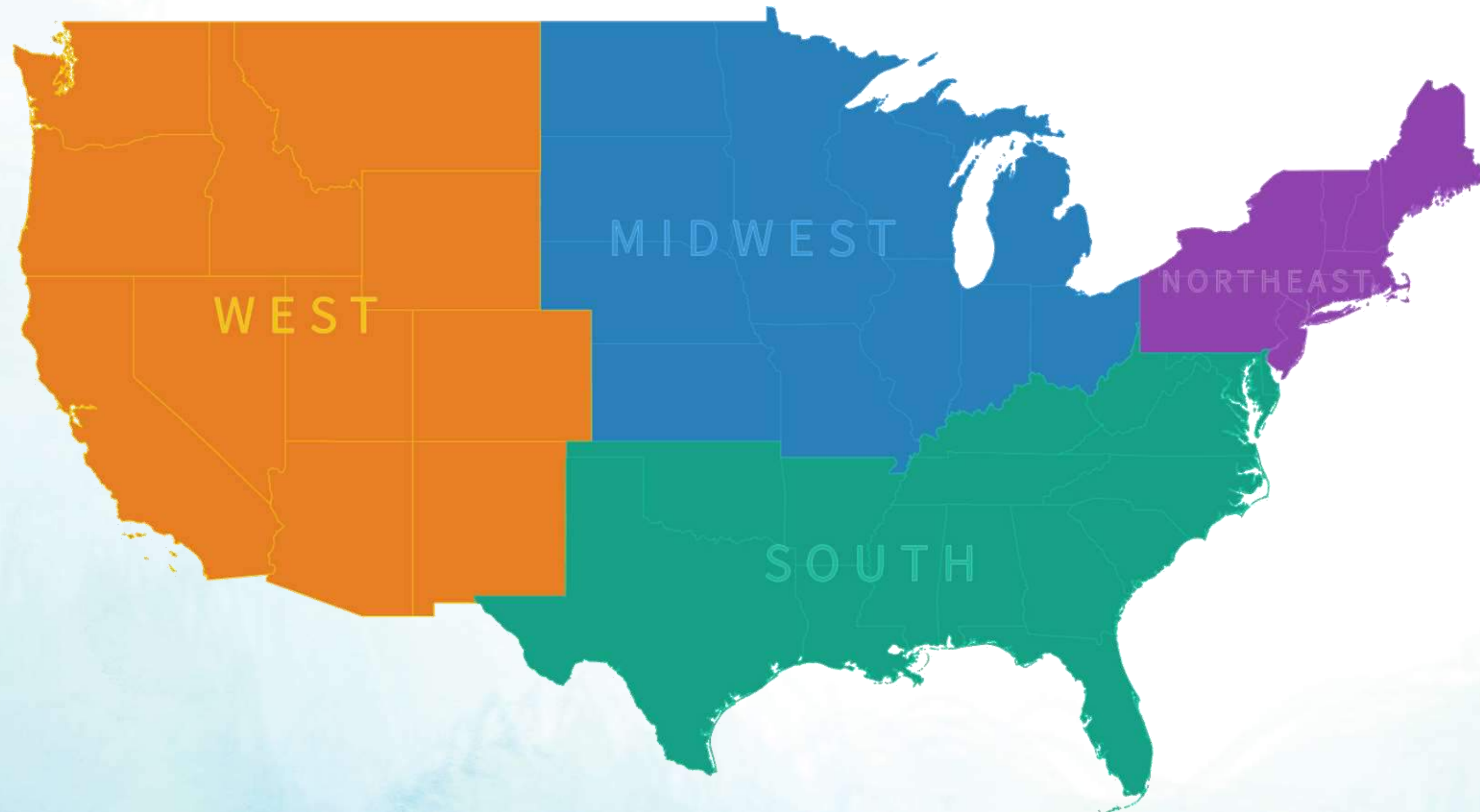
(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

QUESTION: WILL YOU BE TRAVELING OVER THE _____ HOLIDAY?



Destination  Analysts

METHODOLOGY

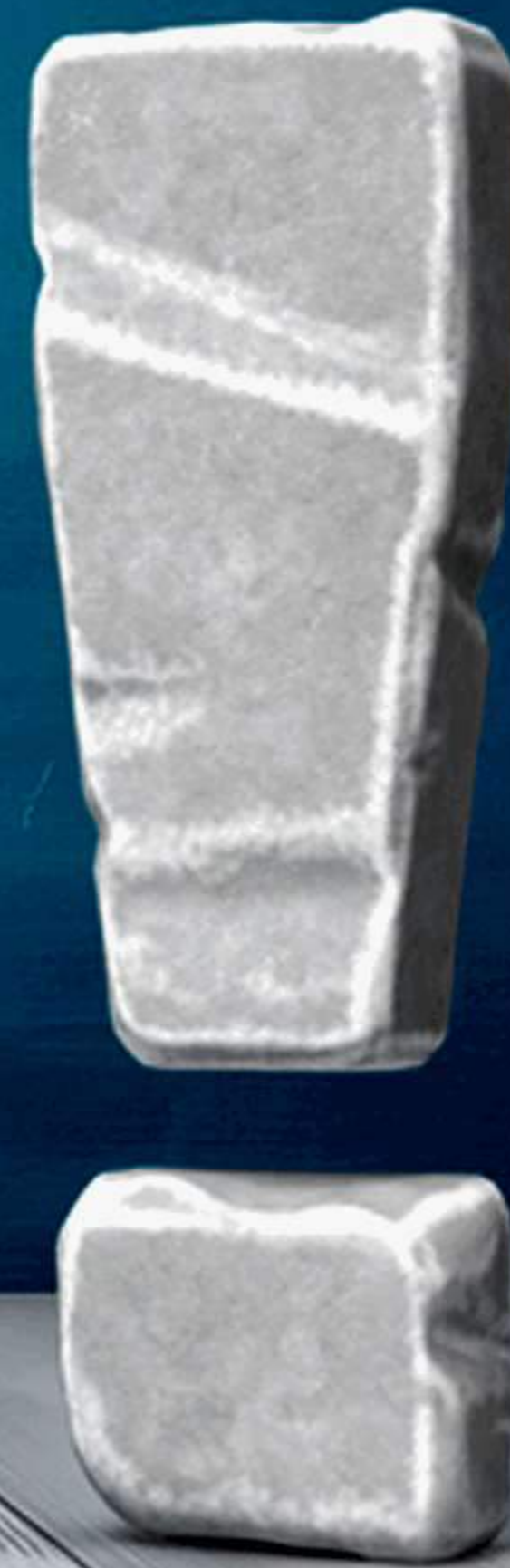


- **Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions**
- **Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom**
- **Week 49 data (fielded February 12-14) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of $\pm 2.8\%$**
- **Data is weighted to reflect the actual population of each region**

Independent Unbiased Research

**Presentation deck and webinar recording
available on our website:**

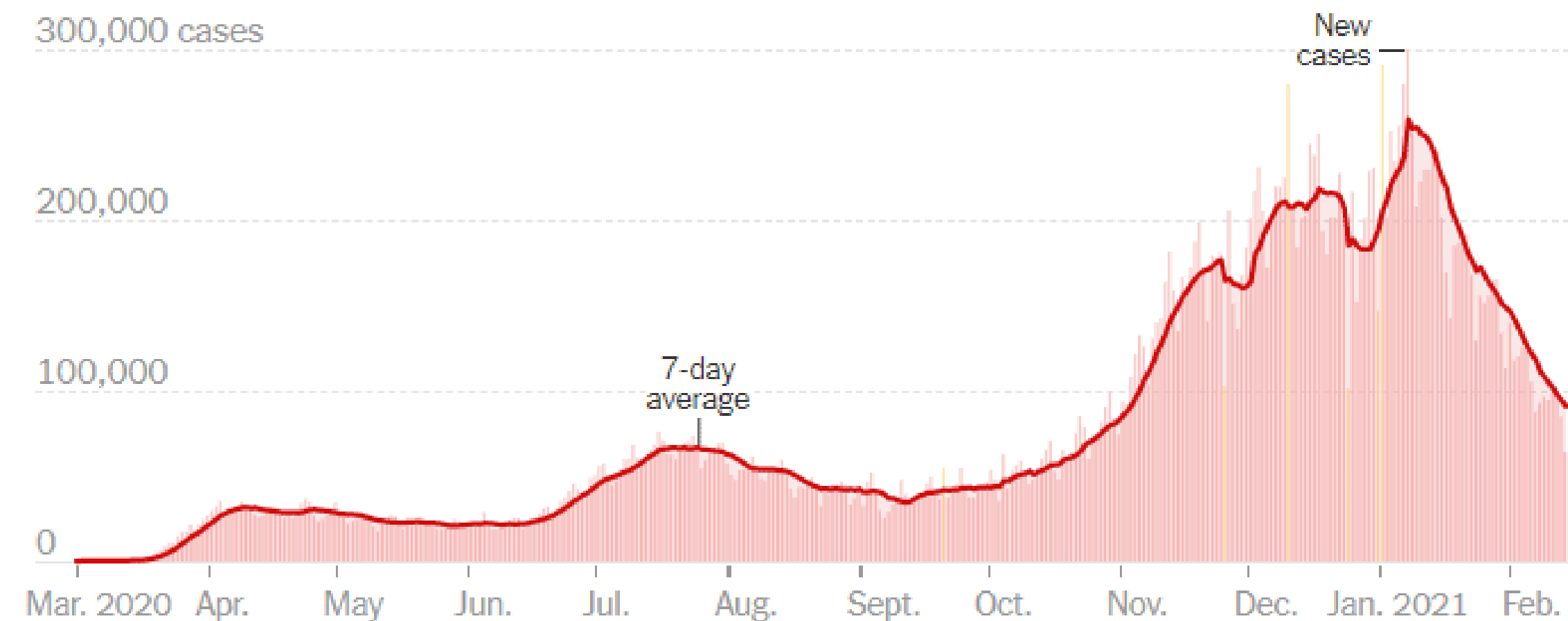
DestinationAnalysts.com/covid-webinars





Coronavirus in the U.S.: Latest Map and Case Count

Updated February 15, 2021, 7:44 A.M. E.T.



	TOTAL REPORTED	ON FEB. 14	14-DAY CHANGE
Cases	27.6 million+	63,850	-39% ↘
Deaths	485,154	1,080	-18% →
Hospitalized		67,023	-28% →

■ Day with reporting anomaly. Hospitalization data from the Covid Tracking Project; 14-day change trends use 7-day averages.

Daily change

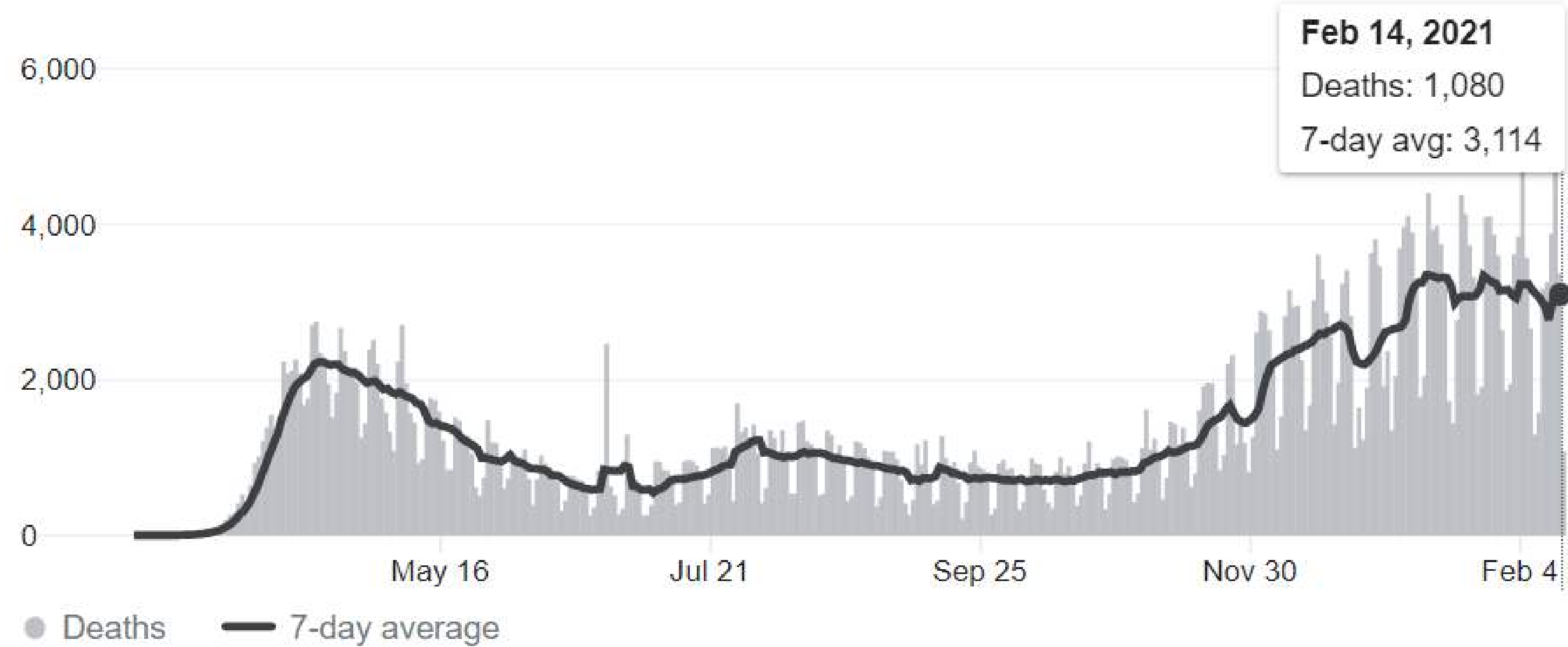
Deaths ▼



United States ▼

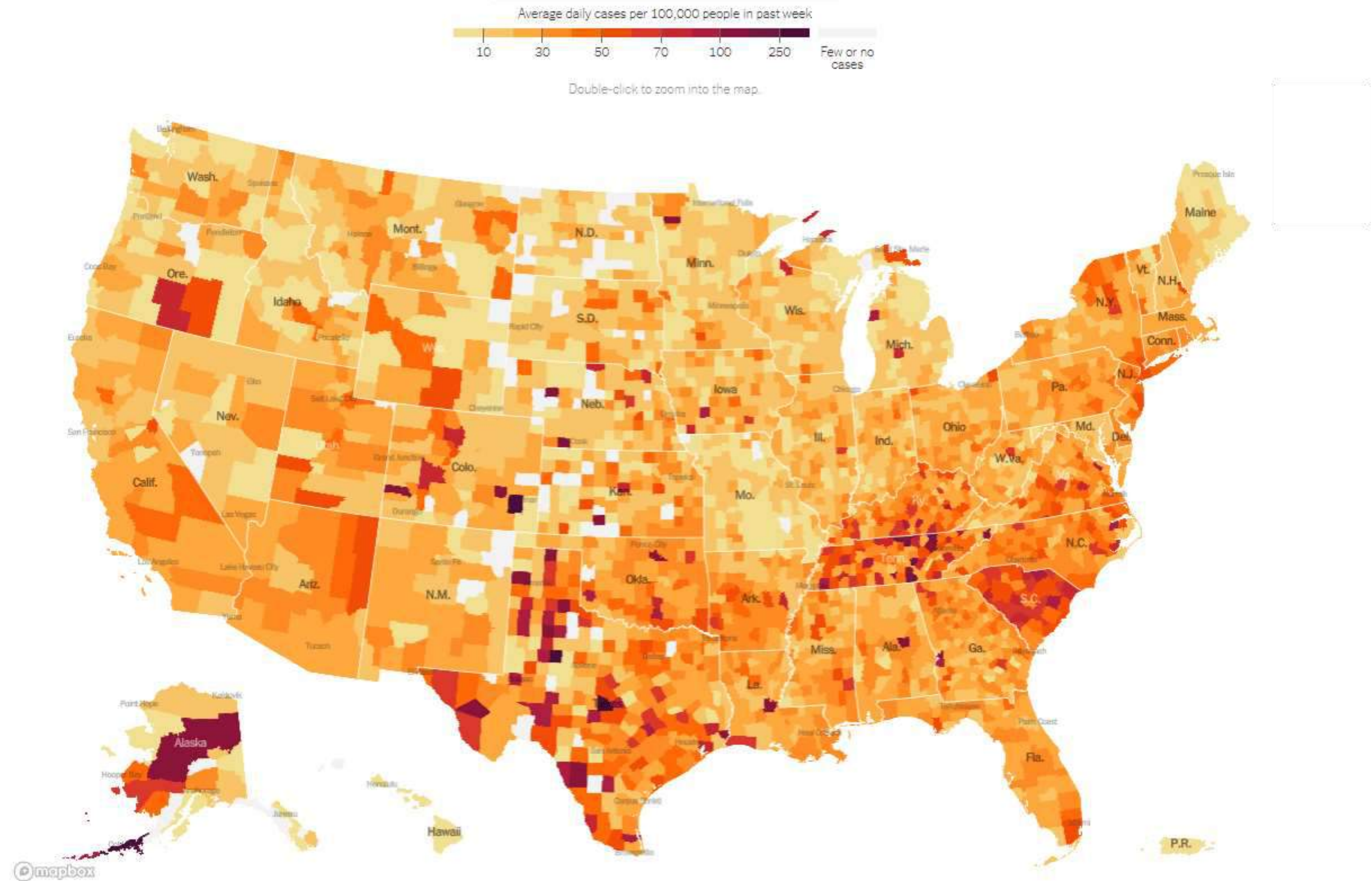
All regions ▼

All time ▼



Each day shows deaths reported since the previous day · Updated less than 16 hours ago ·

Source: [The New York Times](#) · [About this data](#)



12:02



News Spotlight

AA



The End Is in Sight

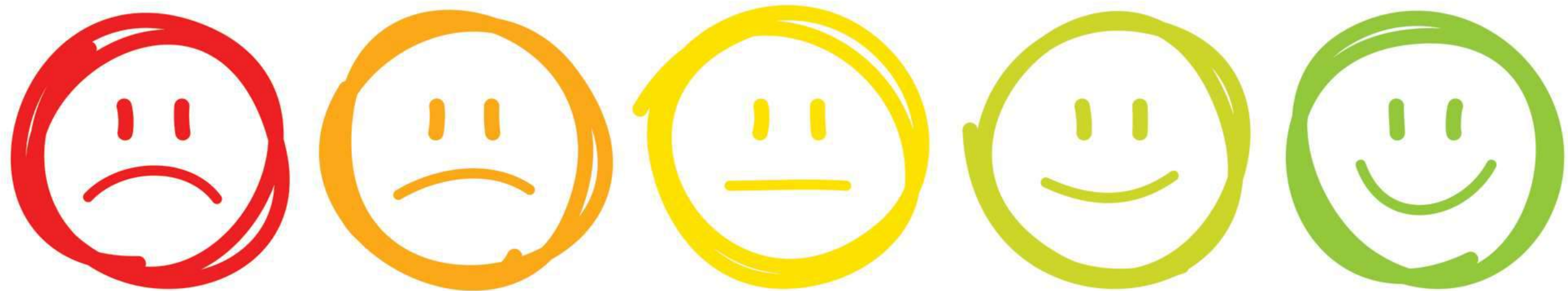
America's COVID-19 vaccination campaign is finally hitting some key goals. If we continue to scale up, the outbreak could be under control by summer.

READ NOW IN VOX ►

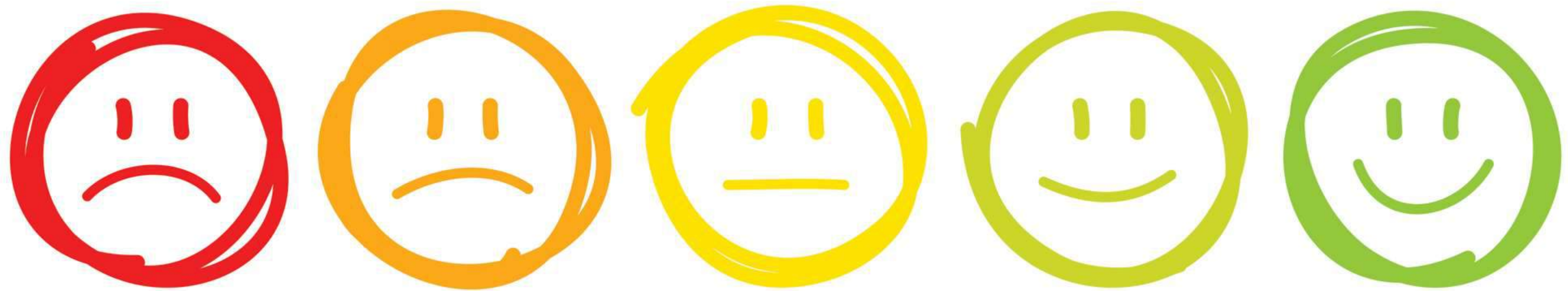
WHAT'S WORKING



What's the general mood
you've observed among
people right now?



What's the current mood
among American travelers?



TAKEAWAYS

1

Concerns about COVID-related health and safety issues (while still elevated) have improved.

2

Expectations to get a vaccine have dropped; yet most are still optimistic that vaccines are the path back to normalcy.

3

Travelers are warming to advertising messaging again, and prefer to see such ads online, on social media, on TV and in magazines.

4

Our predictive indexes are seeing improvement, suggesting a more fertile environment for advertising may soon arrive.

5

It appears that even in a pandemic major sporting events can move the needle. If not now, later.



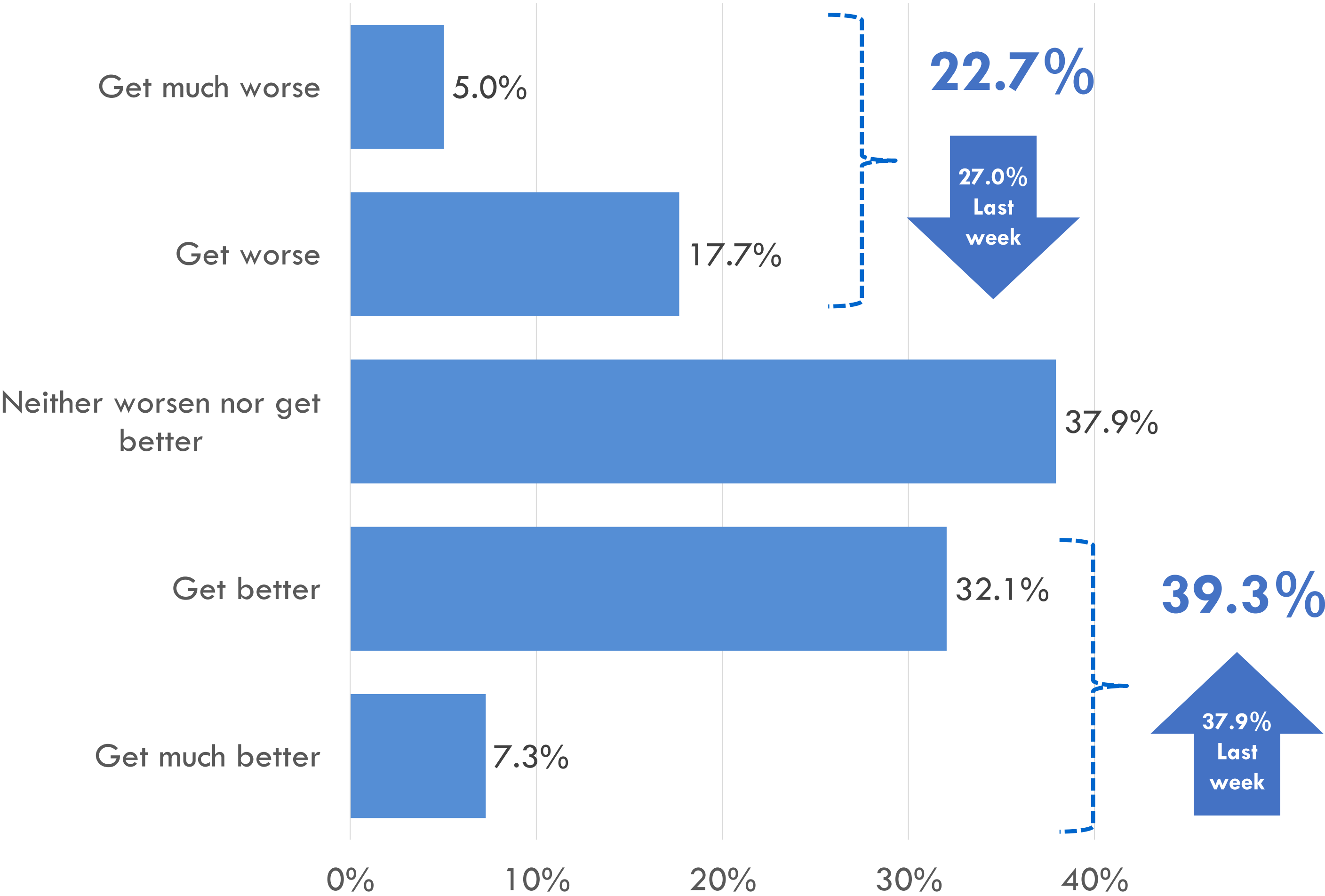
Concerns about COVID-related health and safety issues (while still elevated) have improved.

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 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

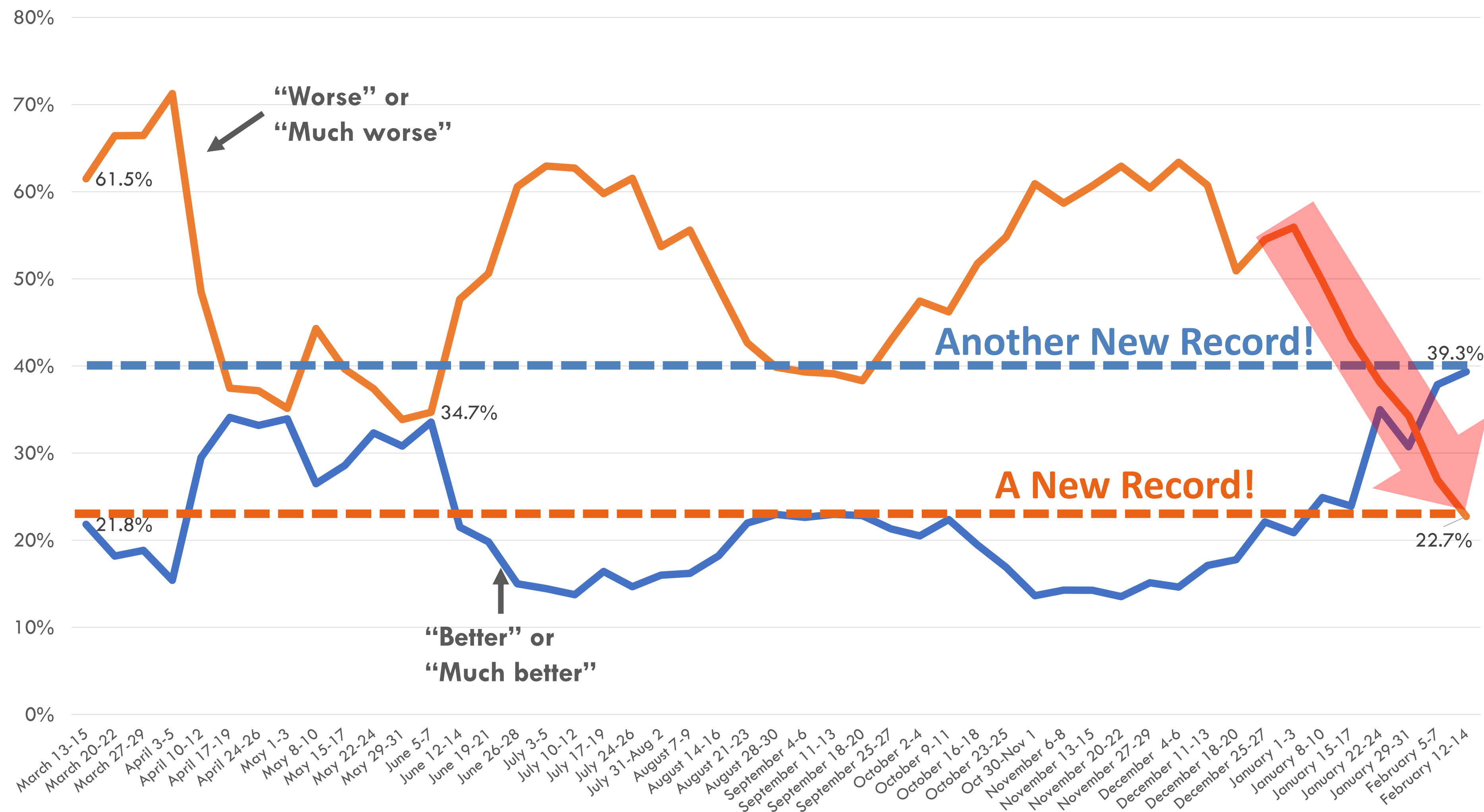


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-49)

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

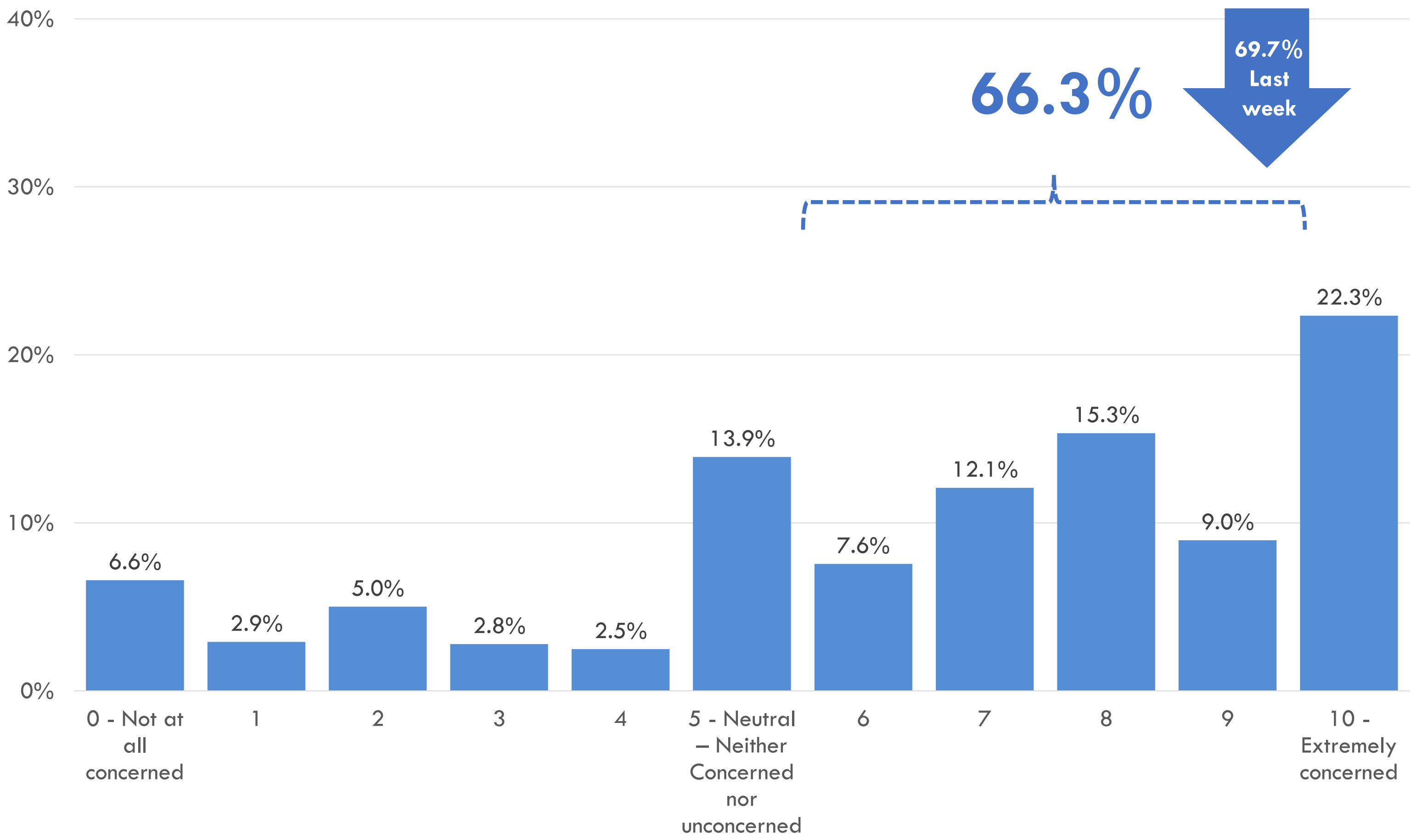
(Base: Waves 1-49. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)



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 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

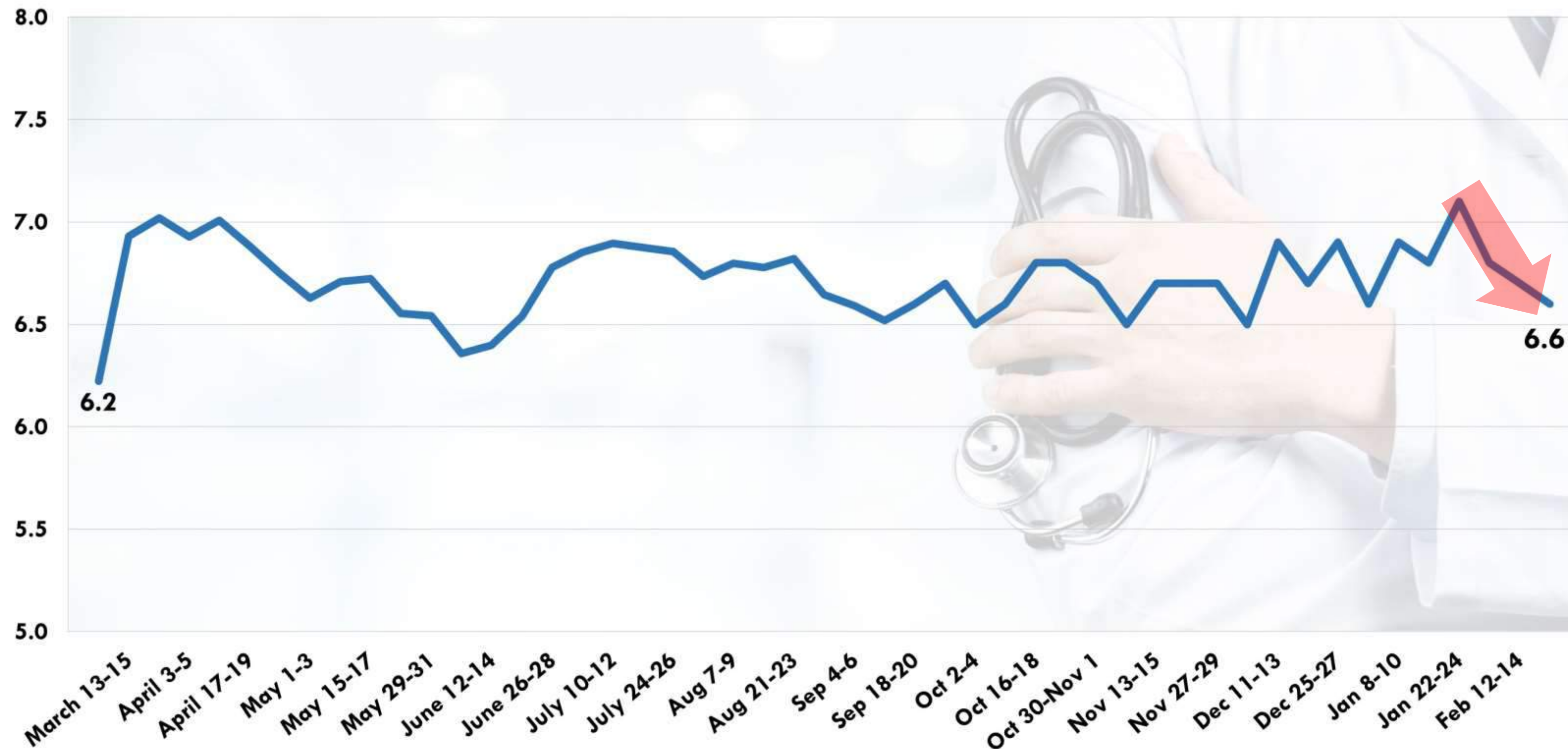


PERSONAL HEALTH CONCERNS

MARCH 13, 2020 – FEBRUARY 14, 2021



CONCERNED ABOUT PERSONAL HEALTH (AVERAGE SCORE ON AN 11-POINT SCALE)



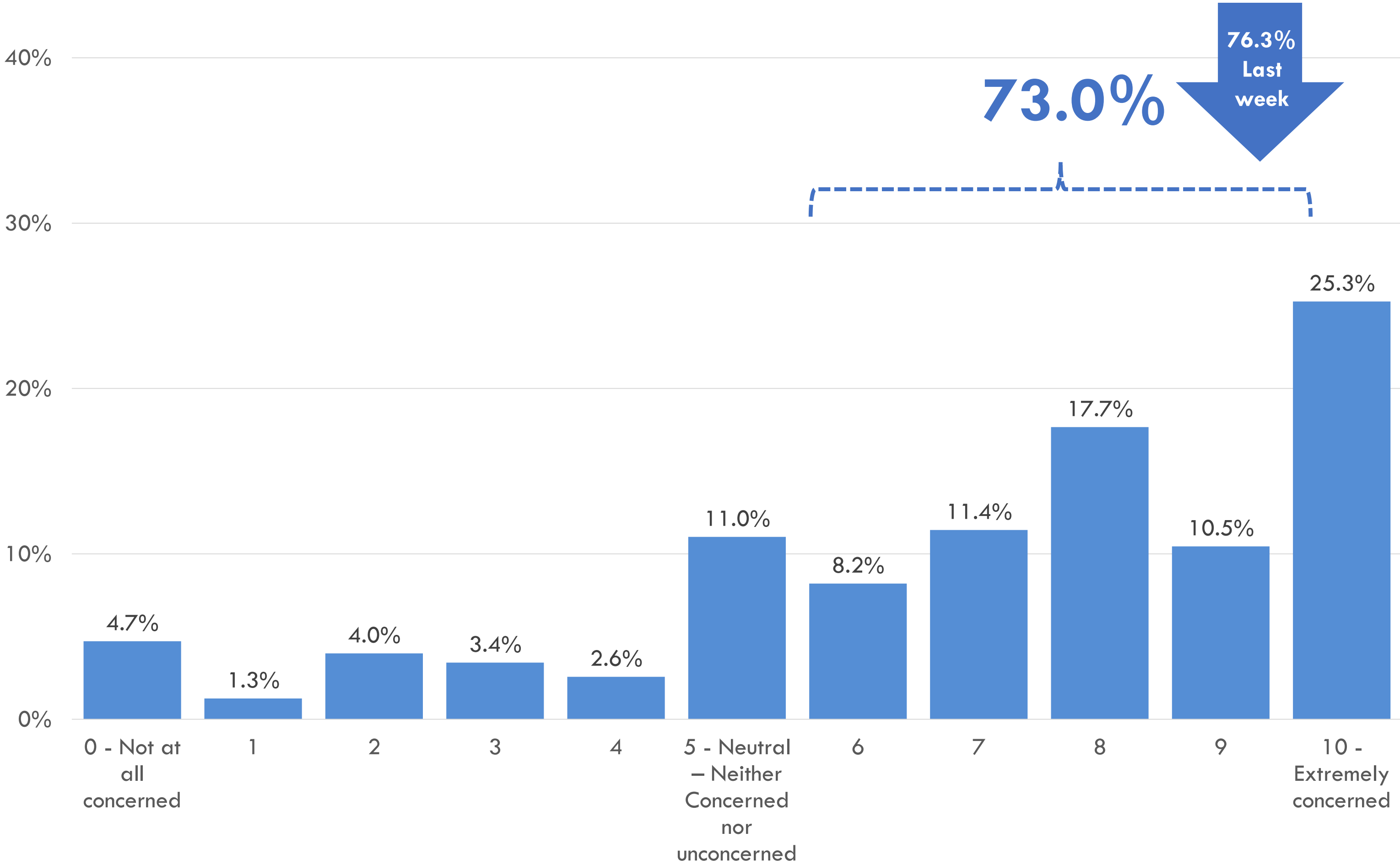
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU PERSONALLY ABOUT CONTRACTING THE VIRUS?

(Base: Waves 1-49. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 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 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

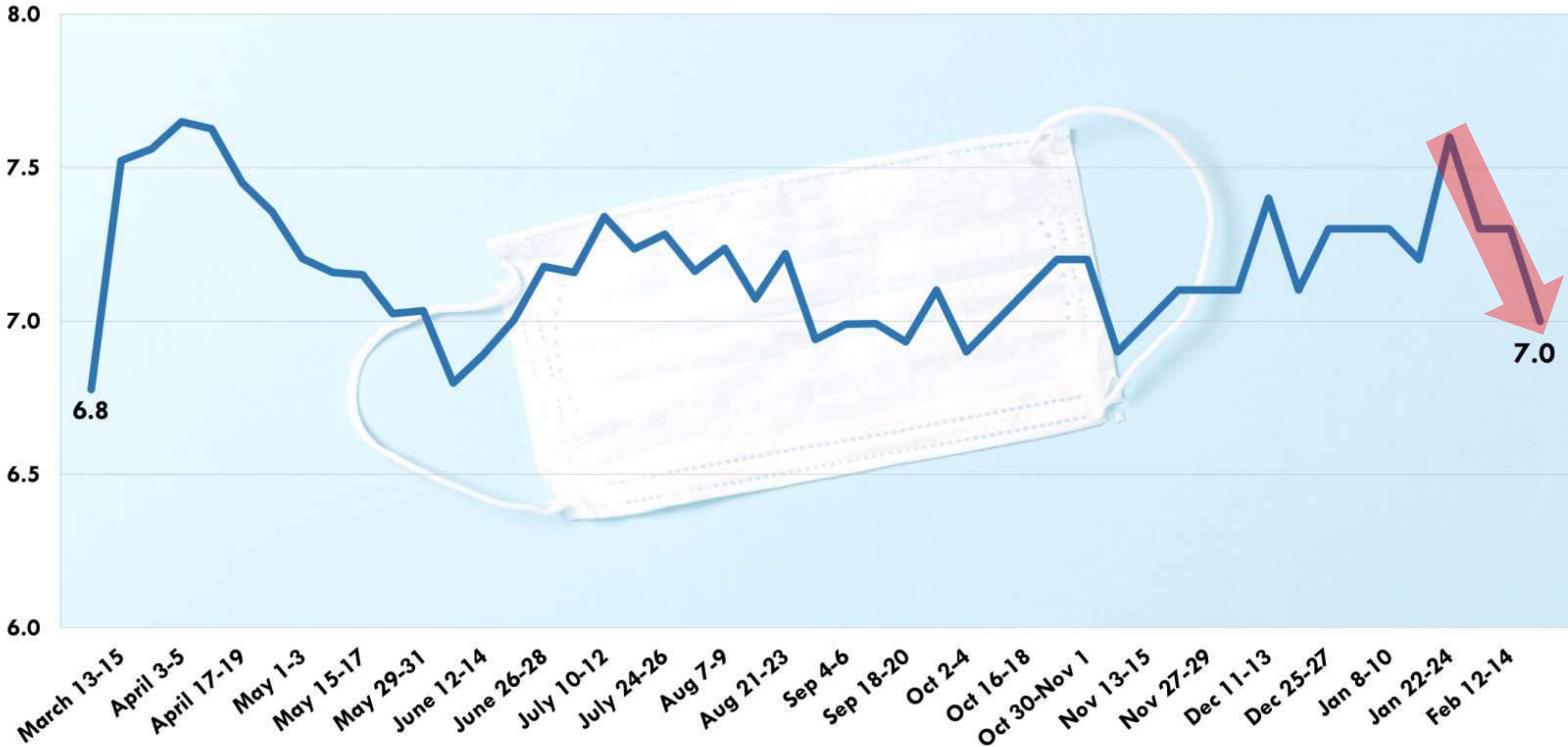


HEALTH CONCERNS (FAMILY & FRIENDS)

MARCH 13, 2020 – FEBRUARY 14, 2021



CONCERNED ABOUT THE HEALTH OF FAMILY OR FRIENDS
(AVERAGE SCORE ON AN 11-POINT SCALE)



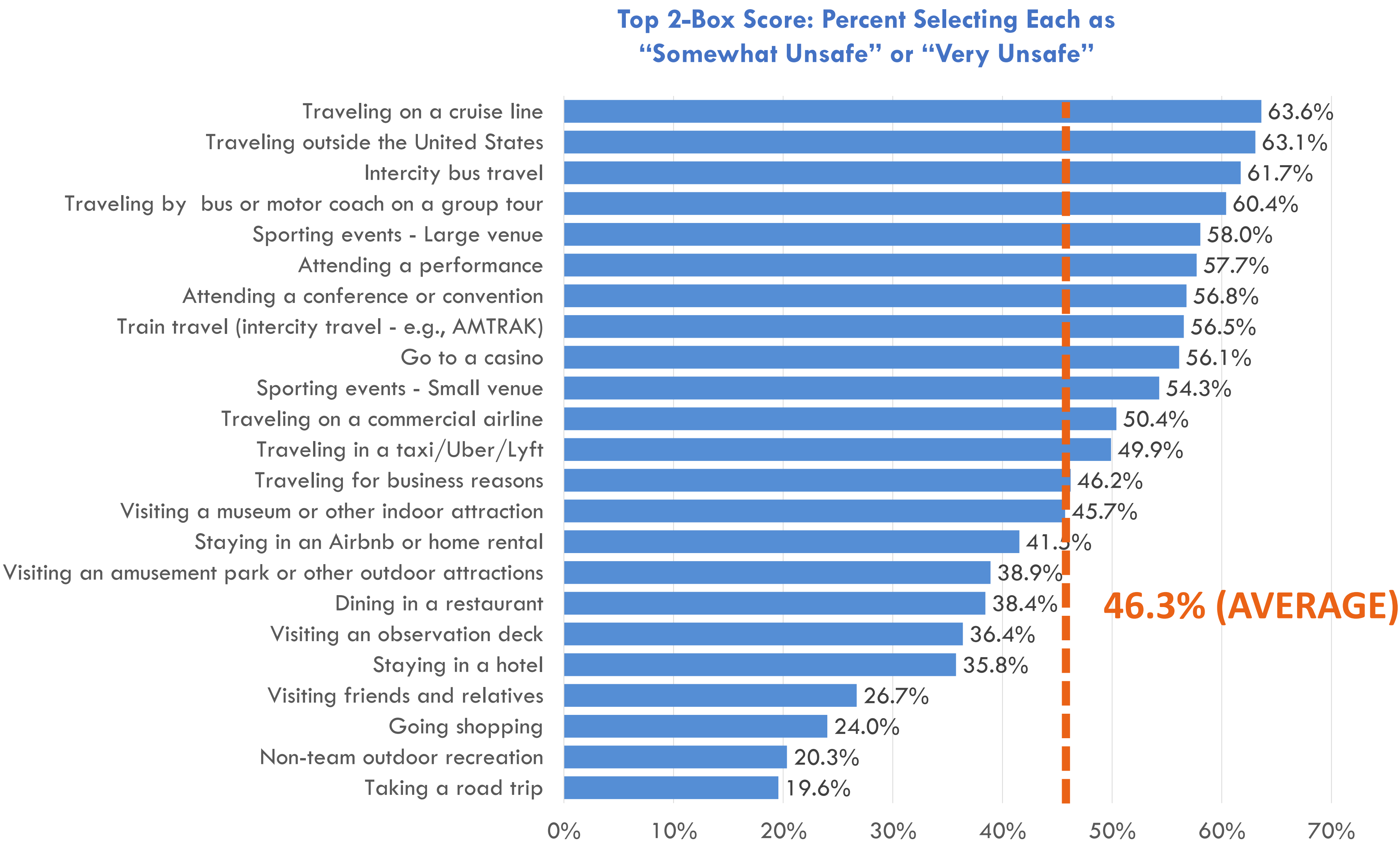
QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, IN GENERAL, HOW CONCERNED ARE YOU ABOUT YOUR FRIENDS OR FAMILY CONTRACTING THE VIRUS?

(Base: Waves 1-49. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

PERCEPTIONS OF TRAVEL ACTIVITIES AS UNSAFE

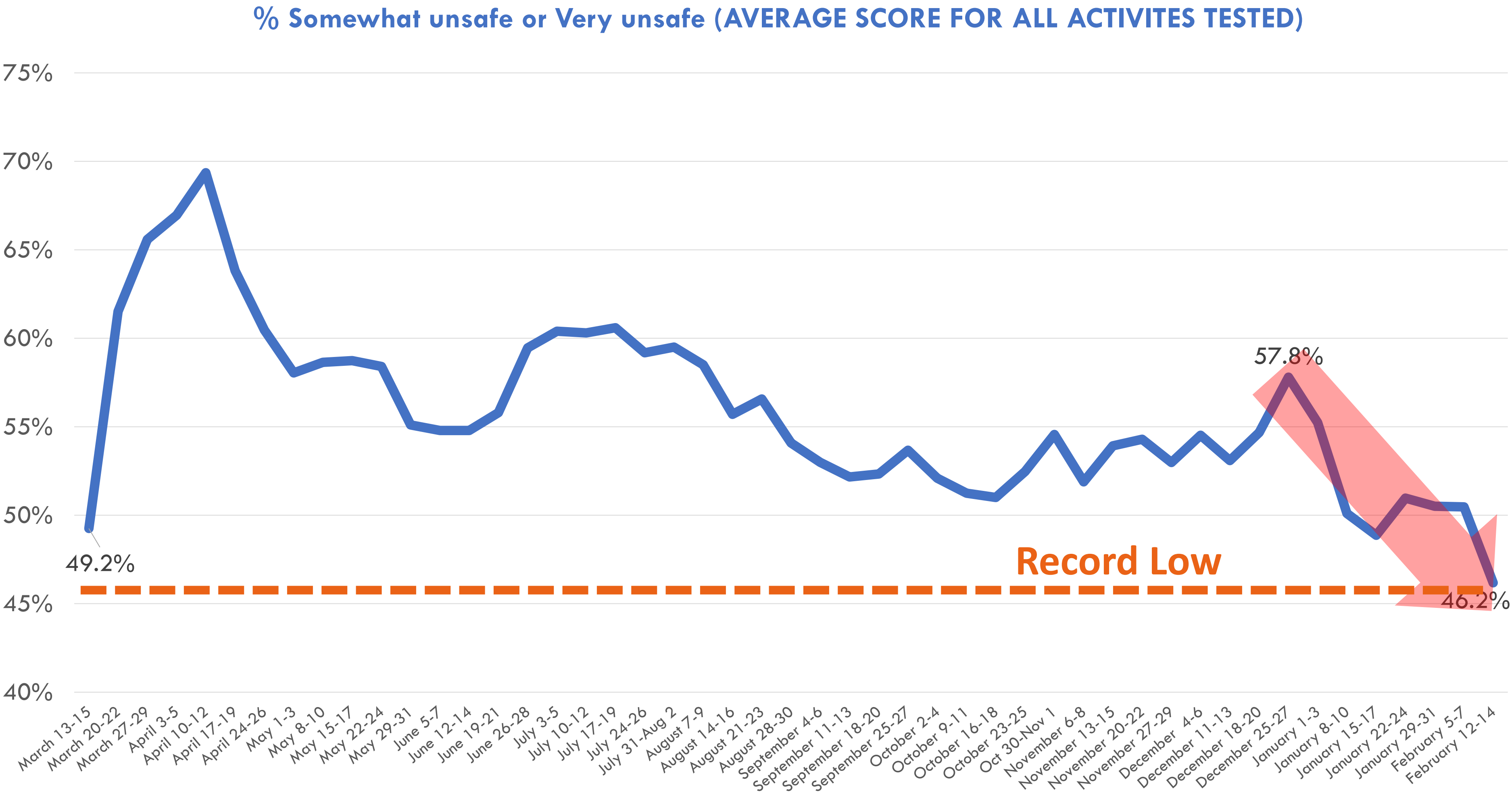
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVES 1-49 COMPARISON)

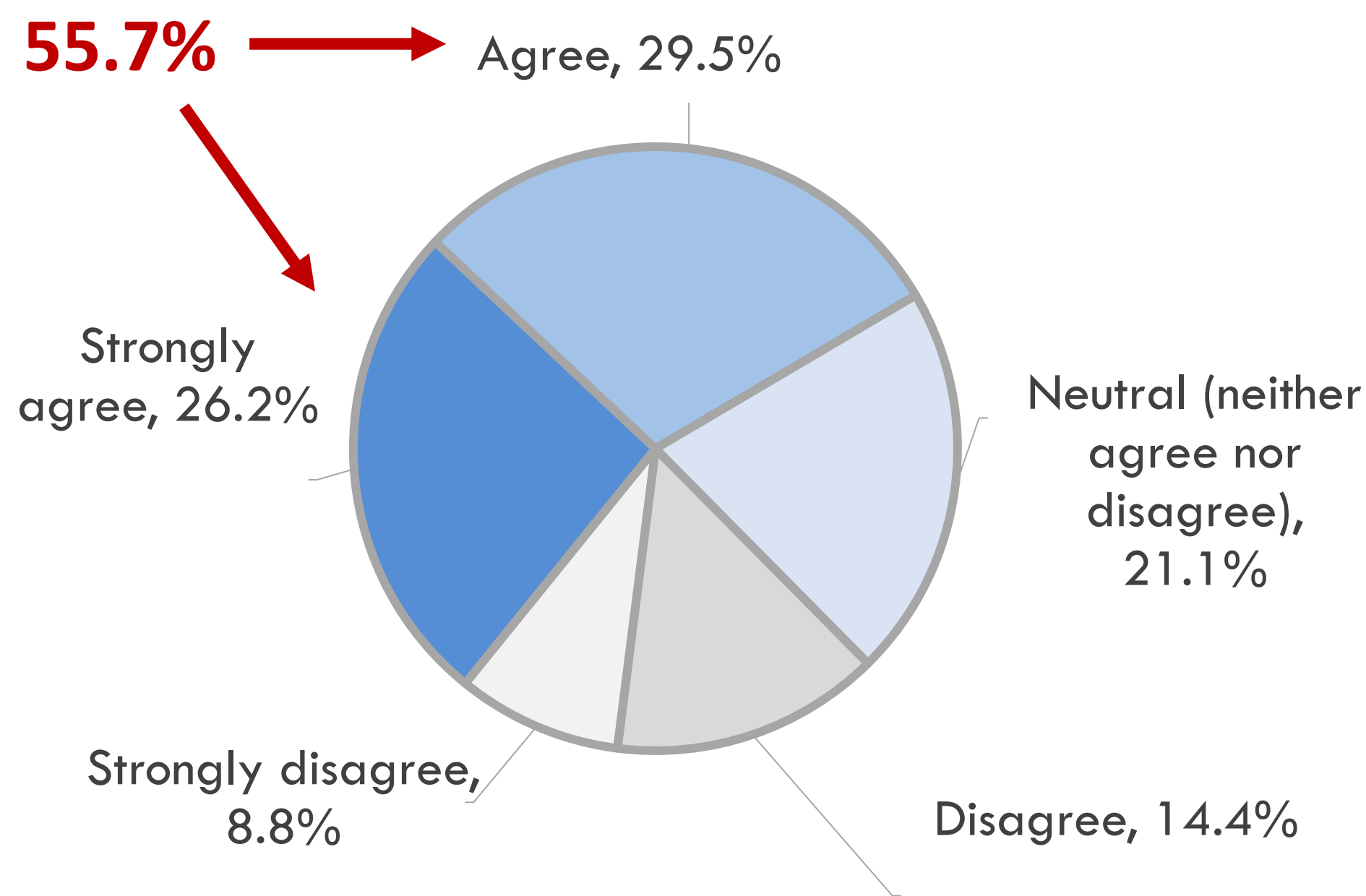
Question: At this moment, how safe would you feel doing each type of travel activity?



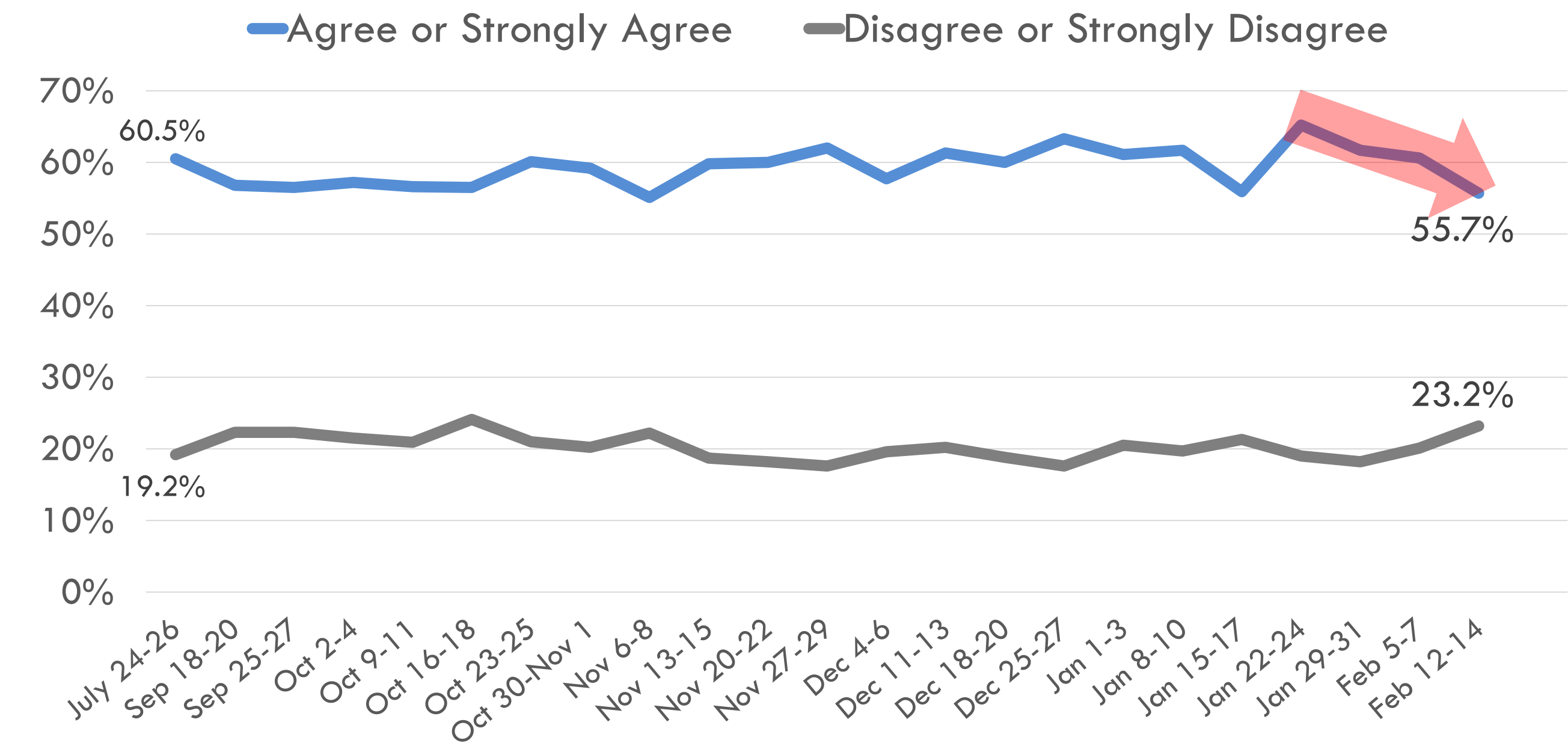
INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

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.



Historical data

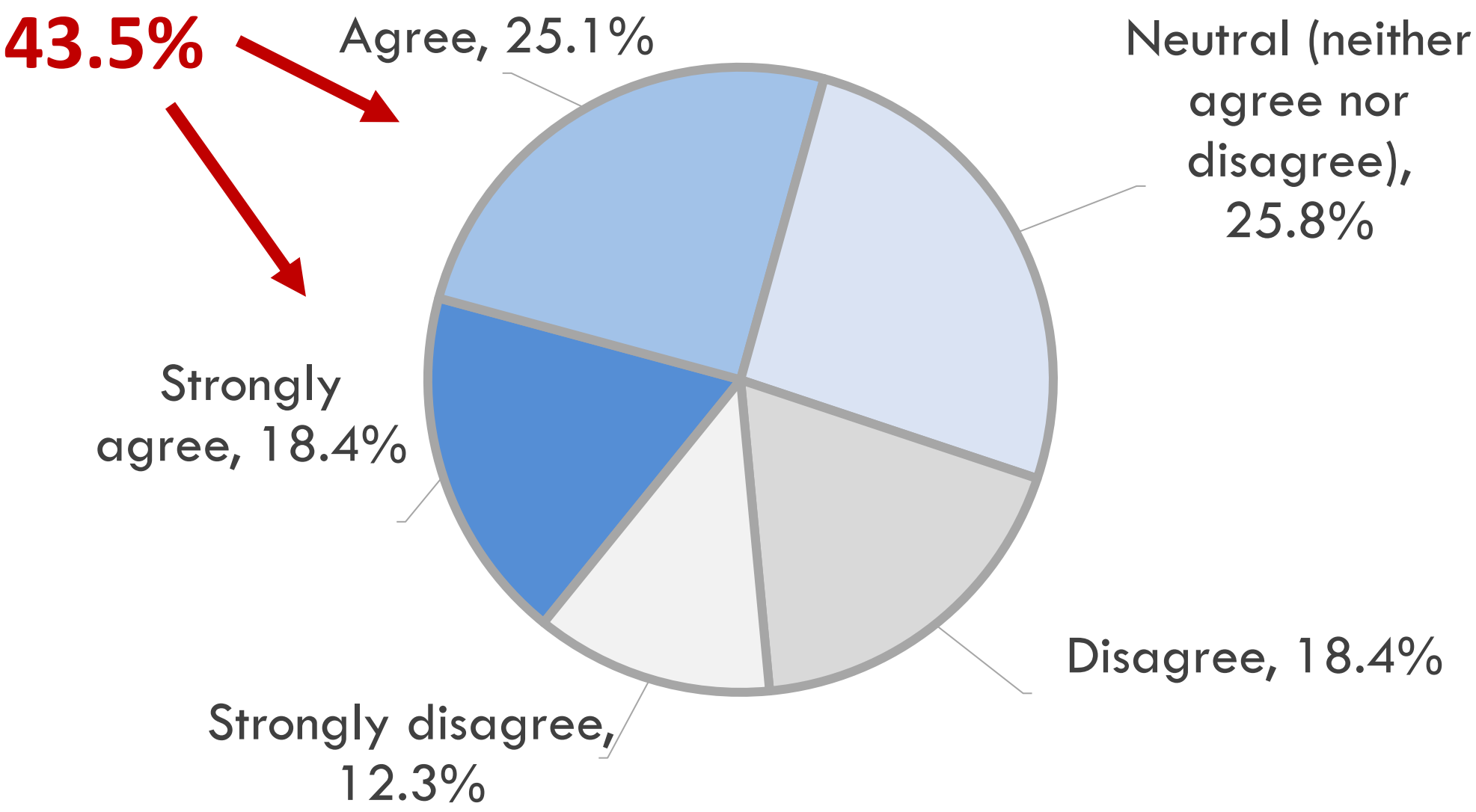


(Base: Waves 20, 28-49 data. All respondents, 1,206, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

LOSS OF INTEREST IN TRAVEL

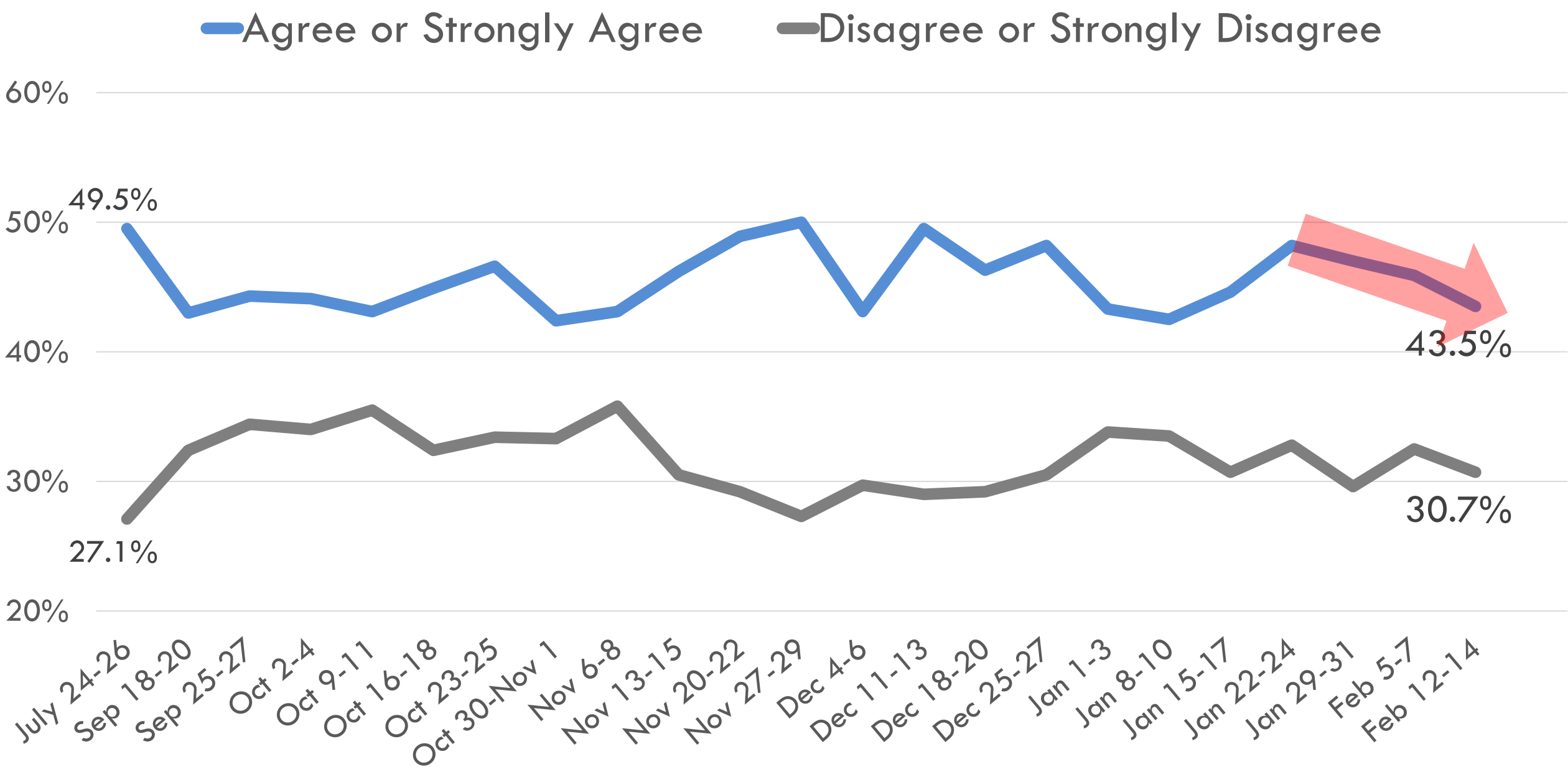
How much do you agree with the following statement?

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



(Base: Waves 20, 28-49 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, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

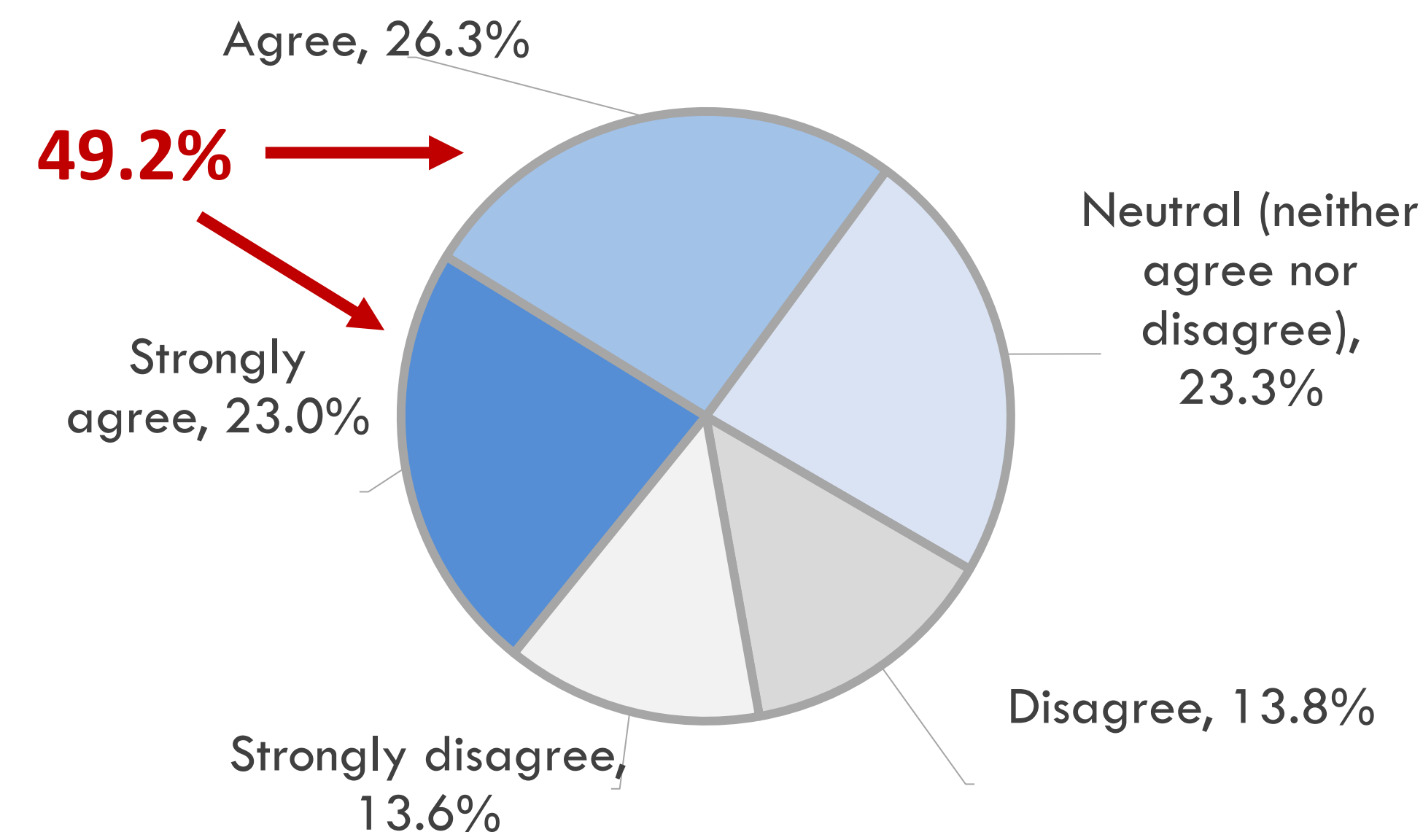
Historical data



TRAVEL AS AN ESSENTIAL NEED ONLY

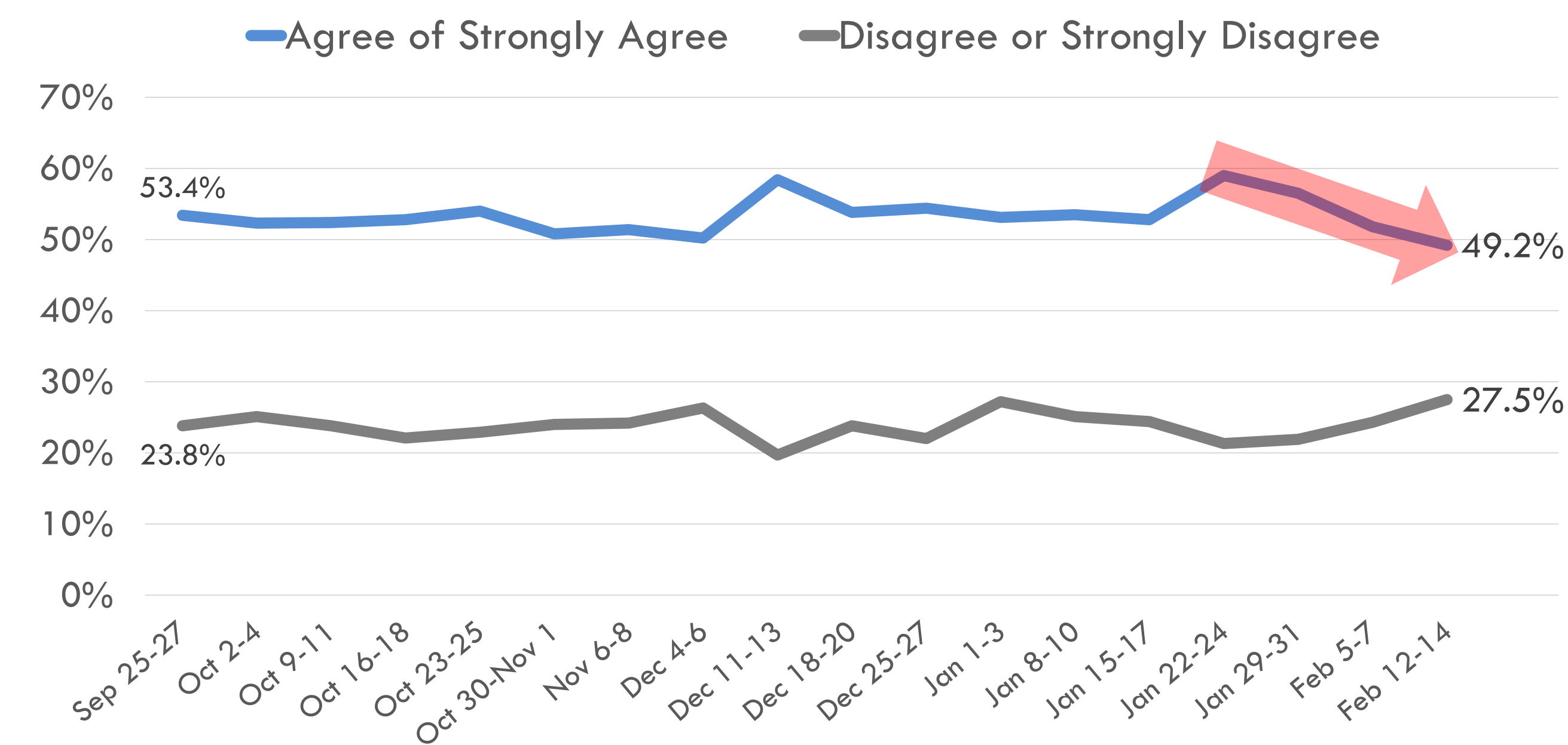
How much do you agree with the following statement?

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



(Base: Waves 29-35, 39-49 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, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

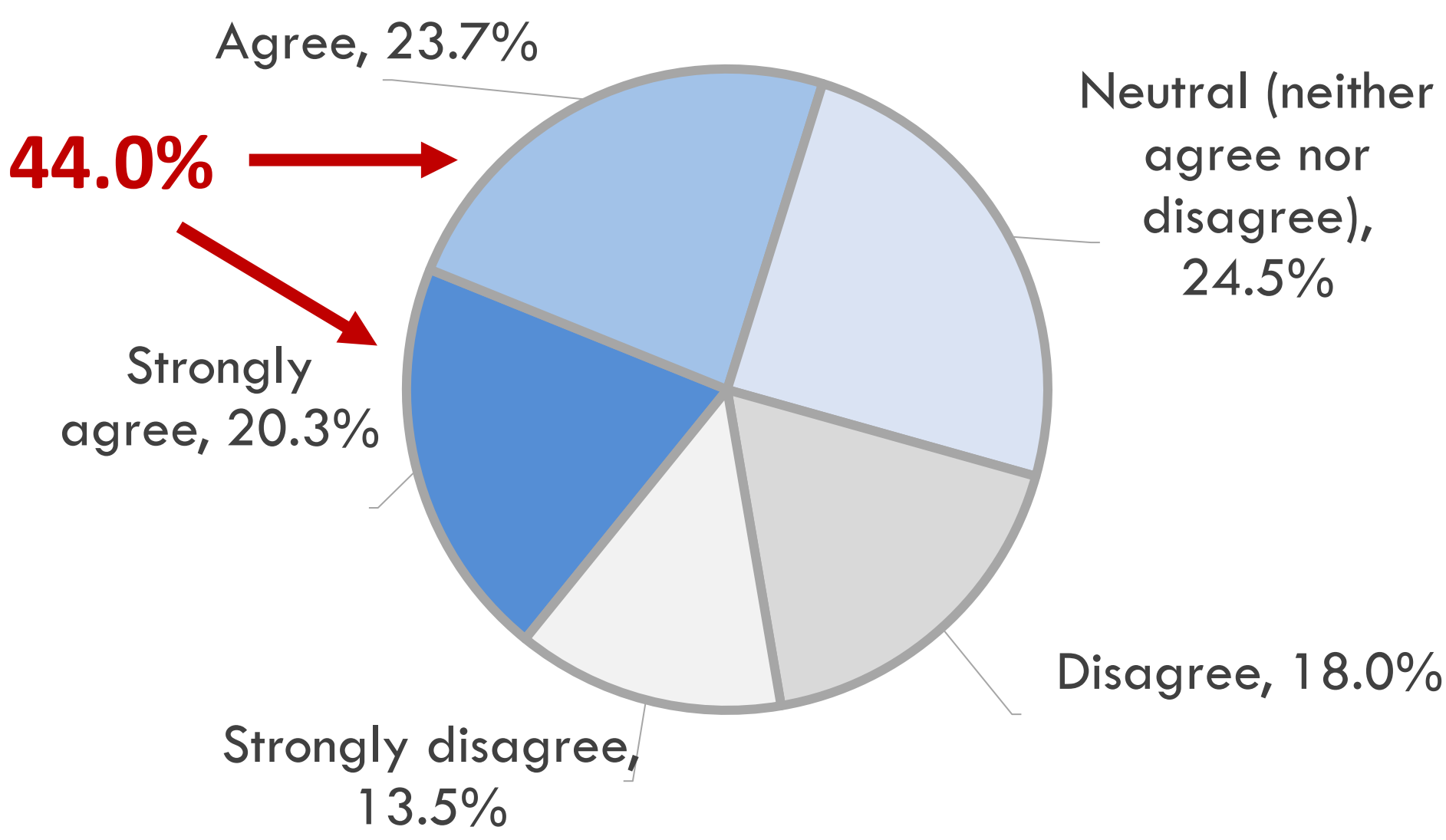
Historical data



TRAVEL GUILT

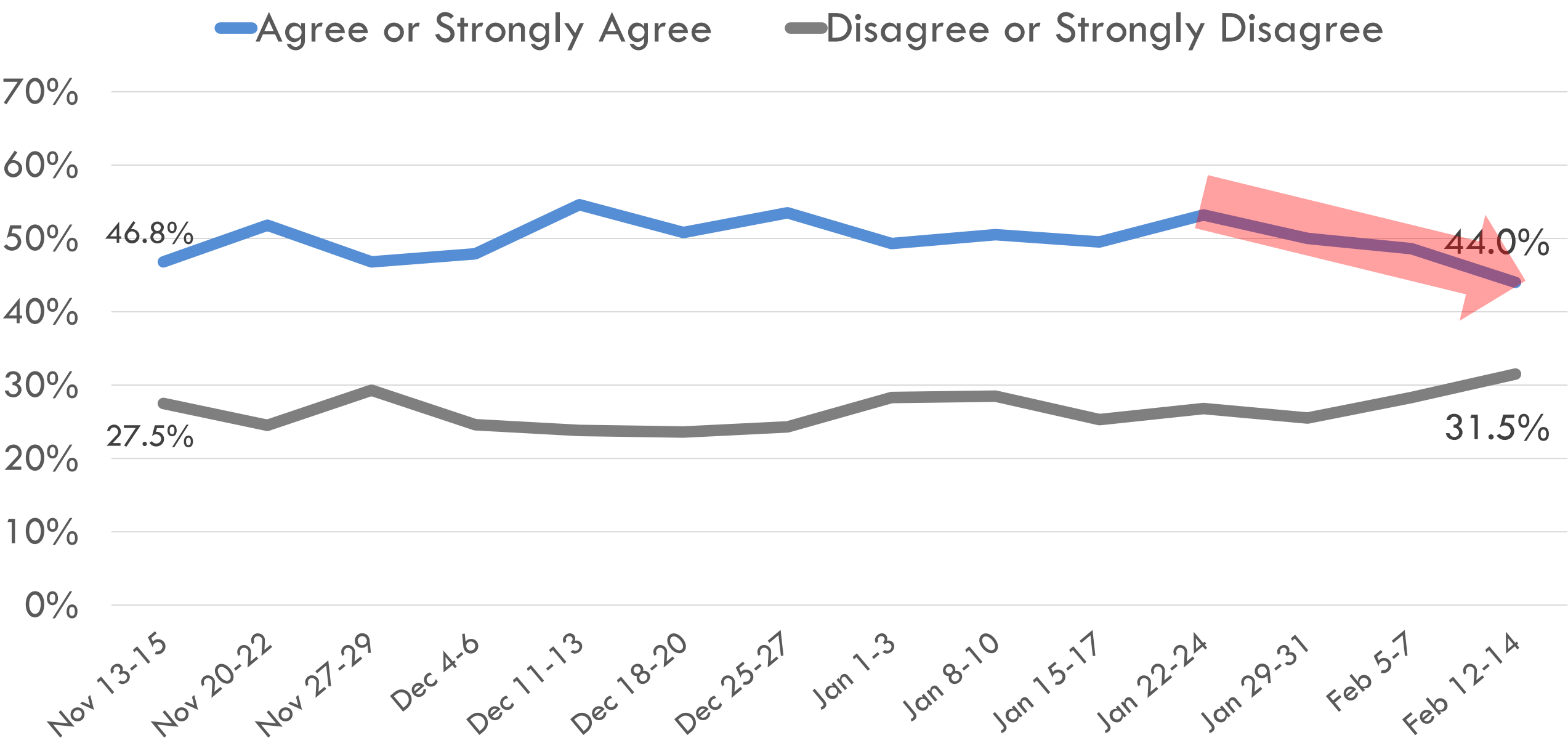
How much do you agree with the following statement?

Statement: I would feel guilty traveling right now.



(Base: Waves 36-49 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

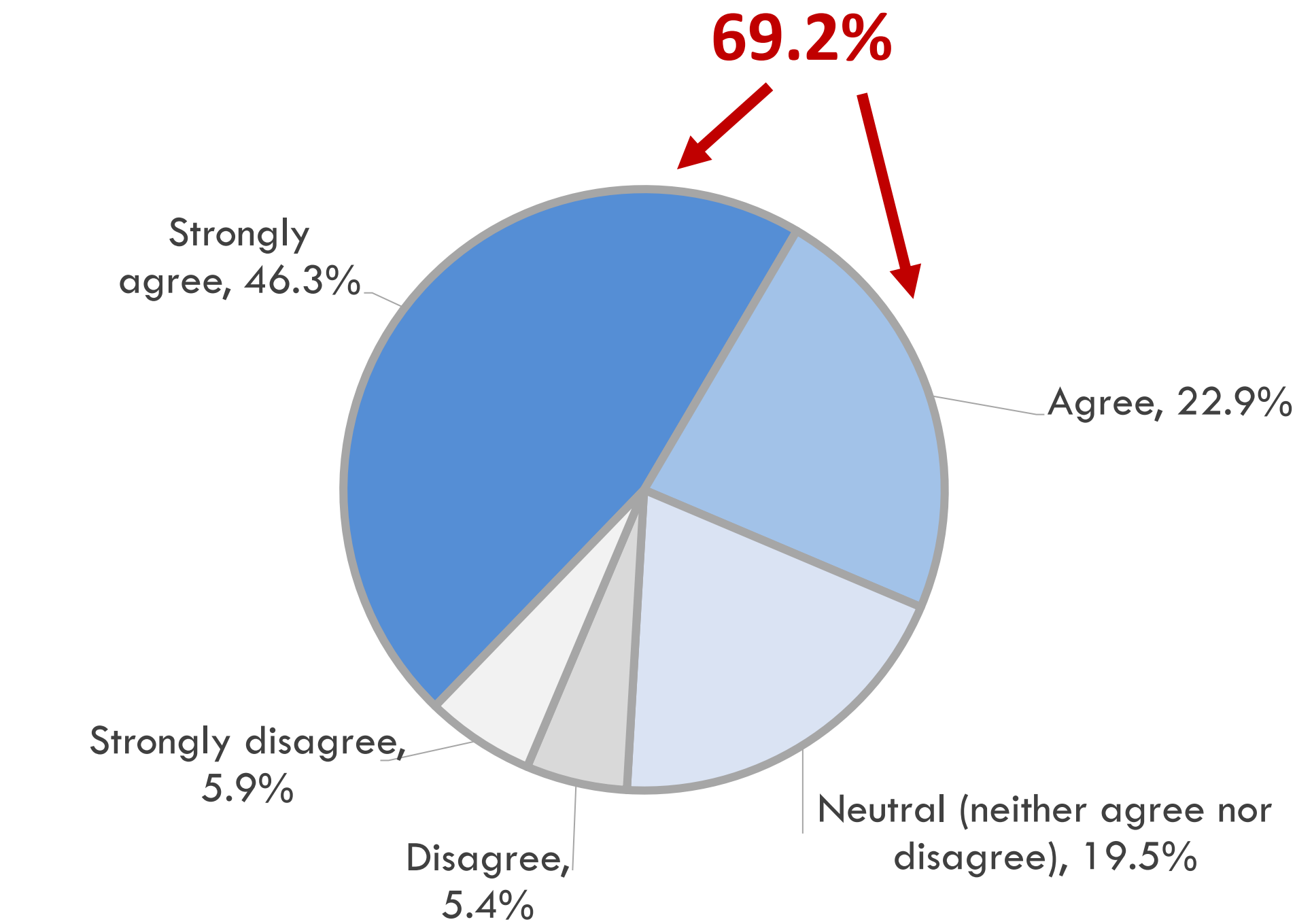
Historical data



AVOIDING INTERNATIONAL TRAVEL

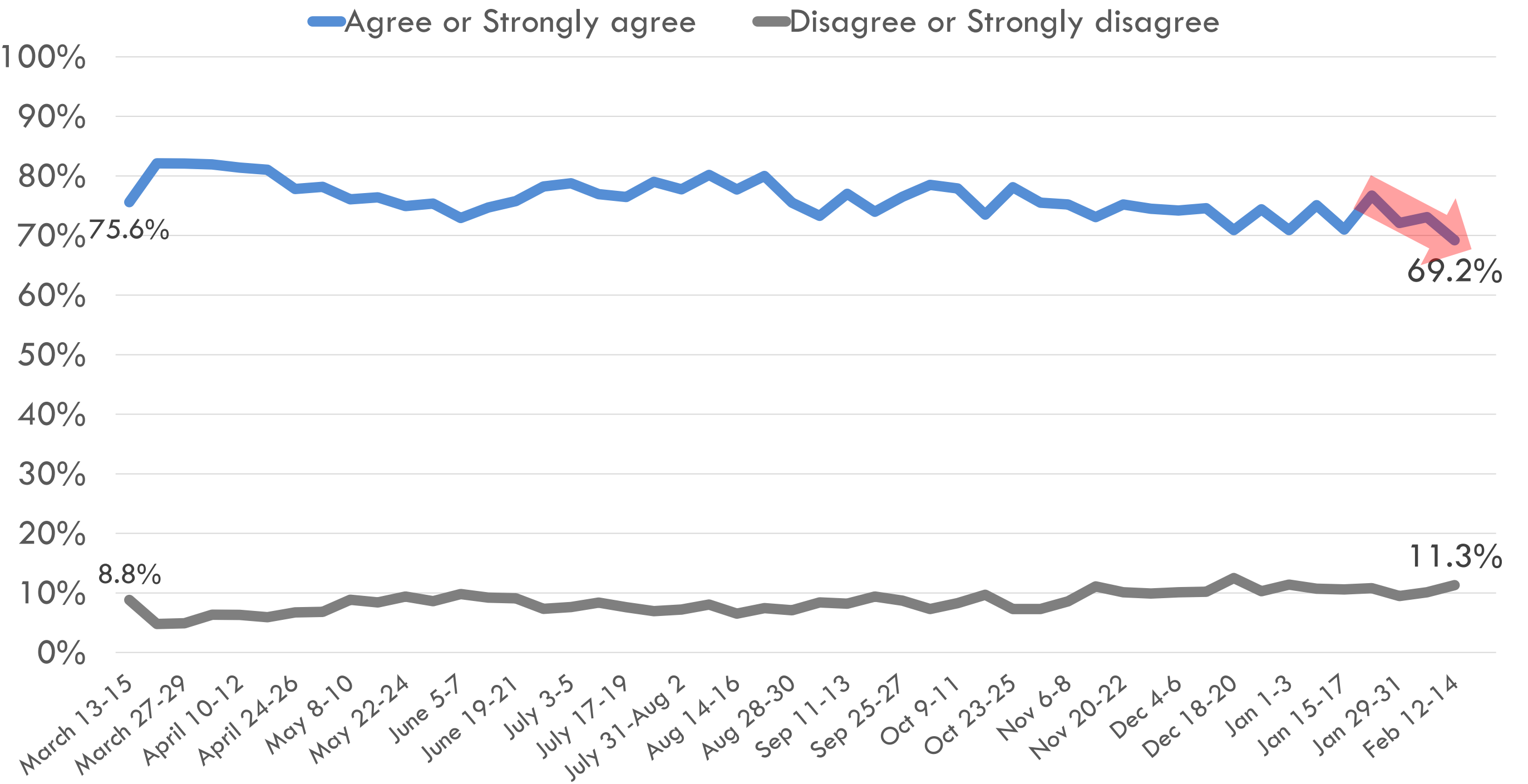
How much do you agree with the following statement?

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



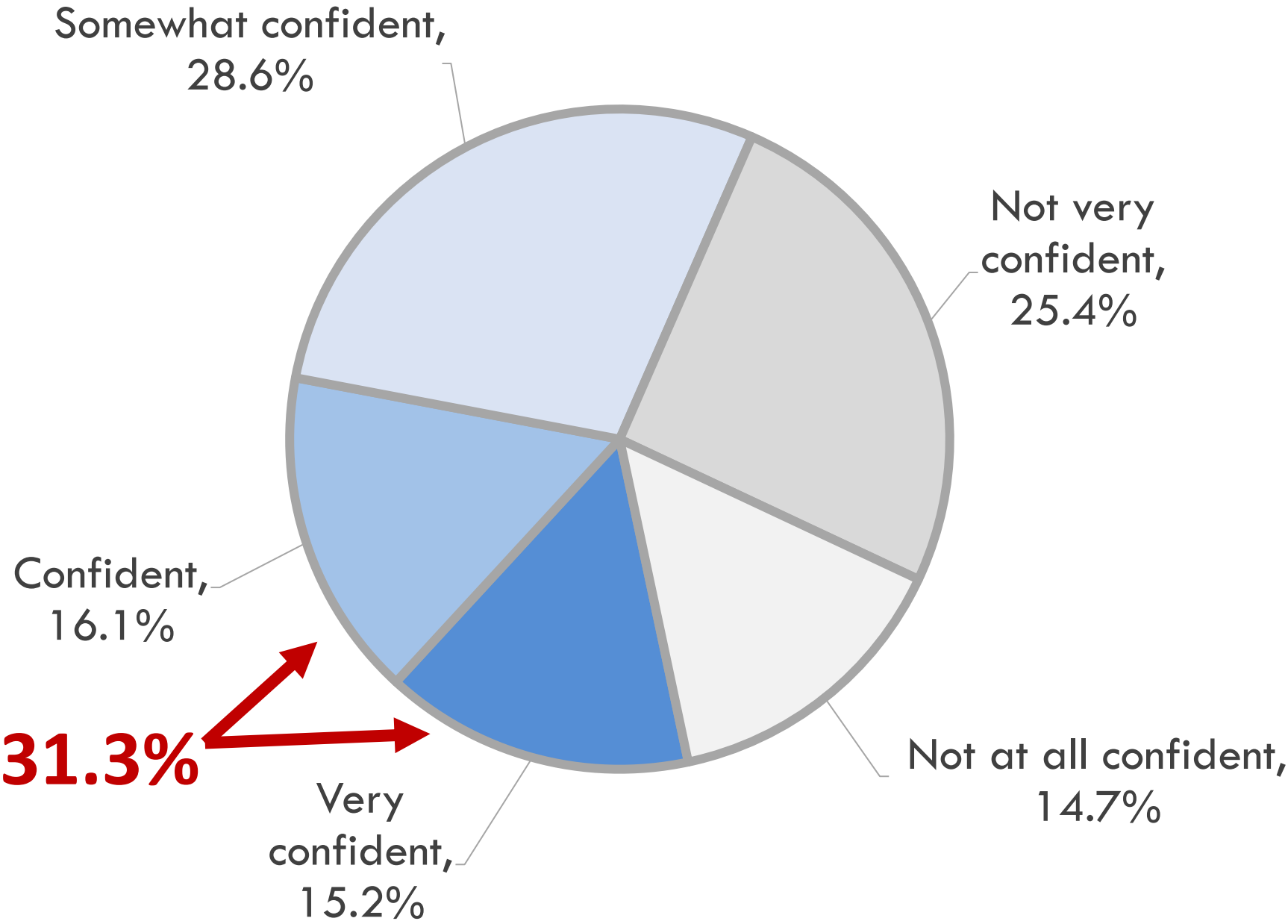
(Base: Waves 1-49. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

Historical data



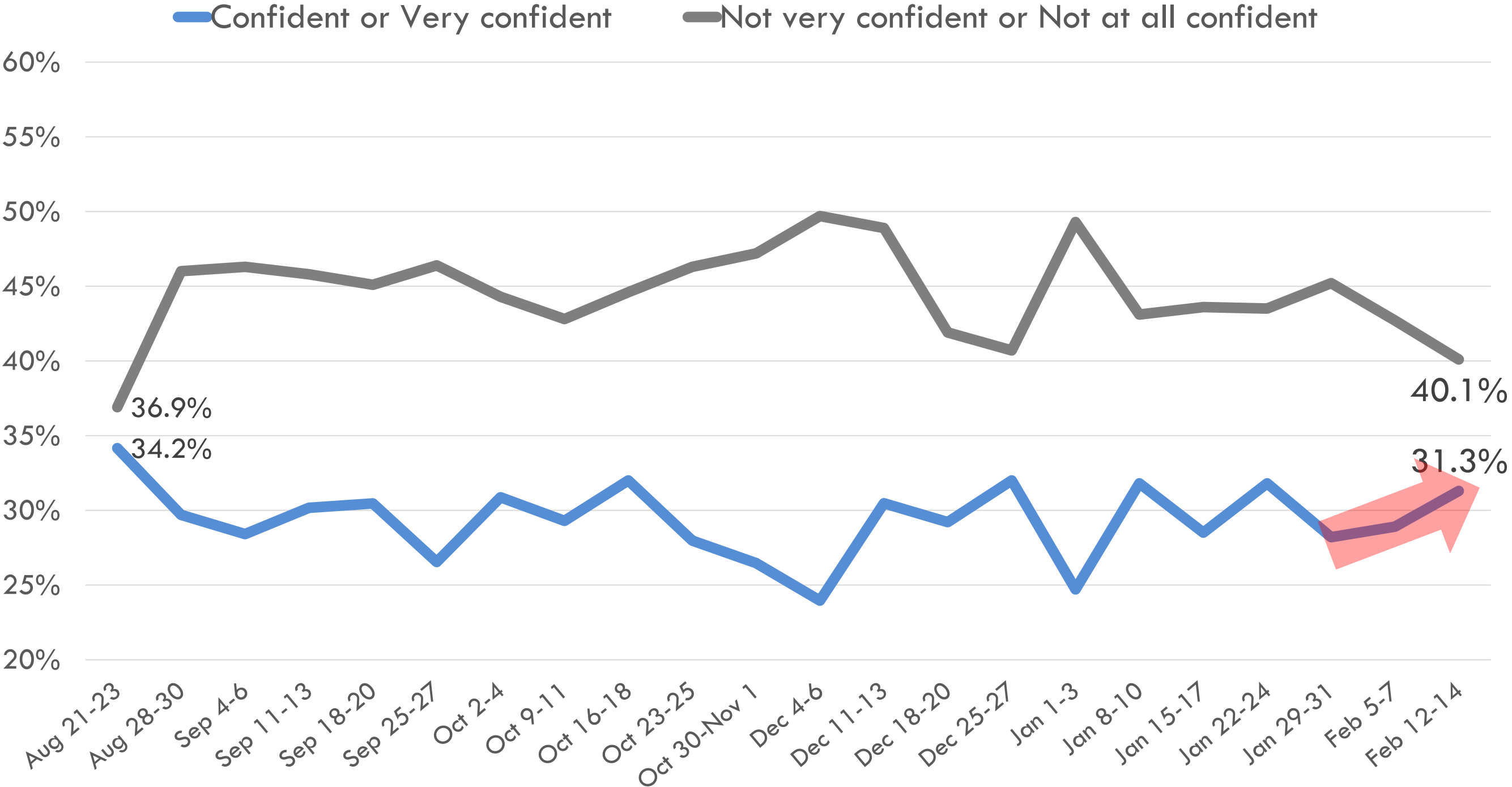
CONFIDENCE IN ABILITY TO TRAVEL SAFELY

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



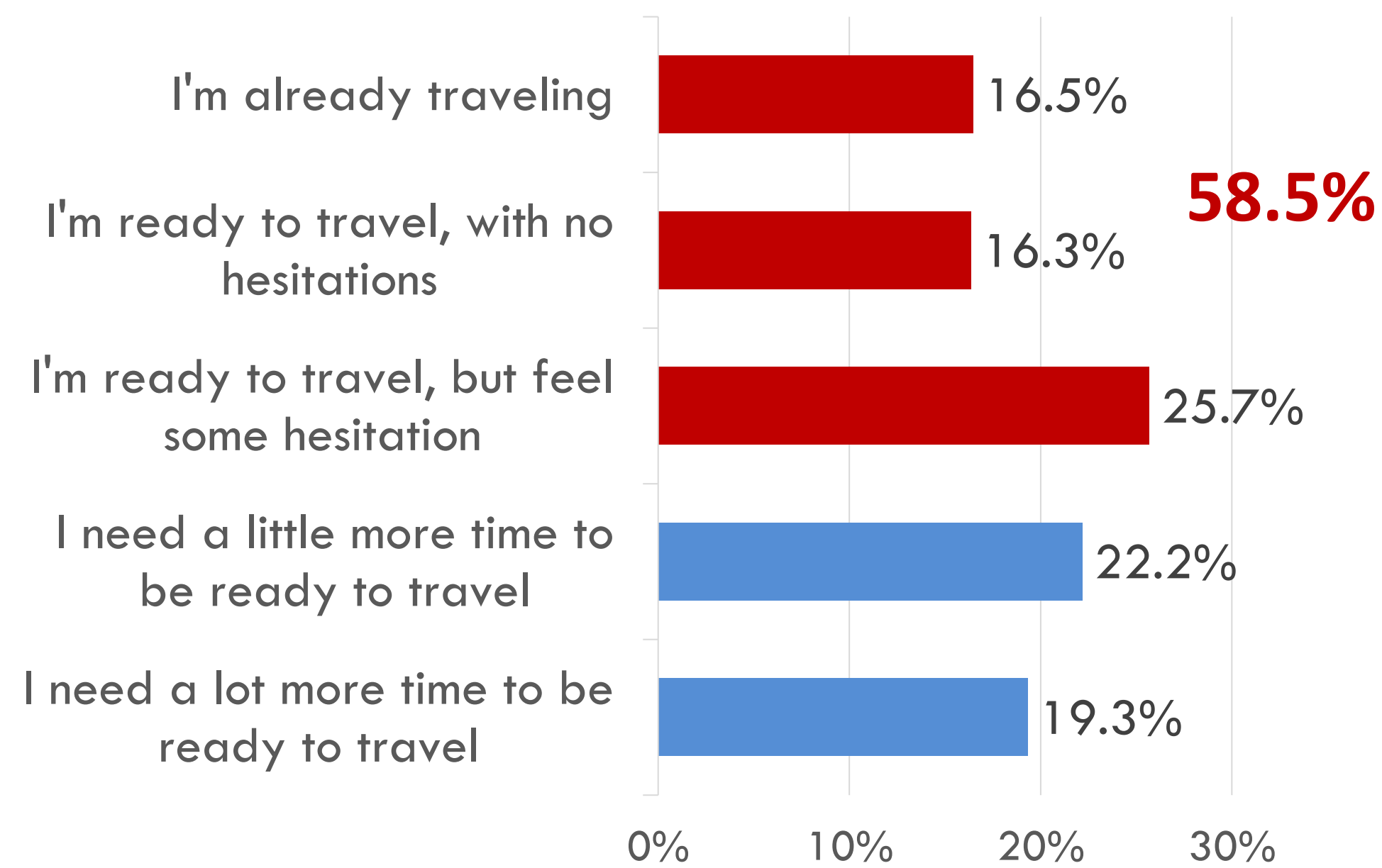
(Base: Wave 24-34 and 39-49 data. All respondents, 1,202, 1,246, 1,222, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

Historical data



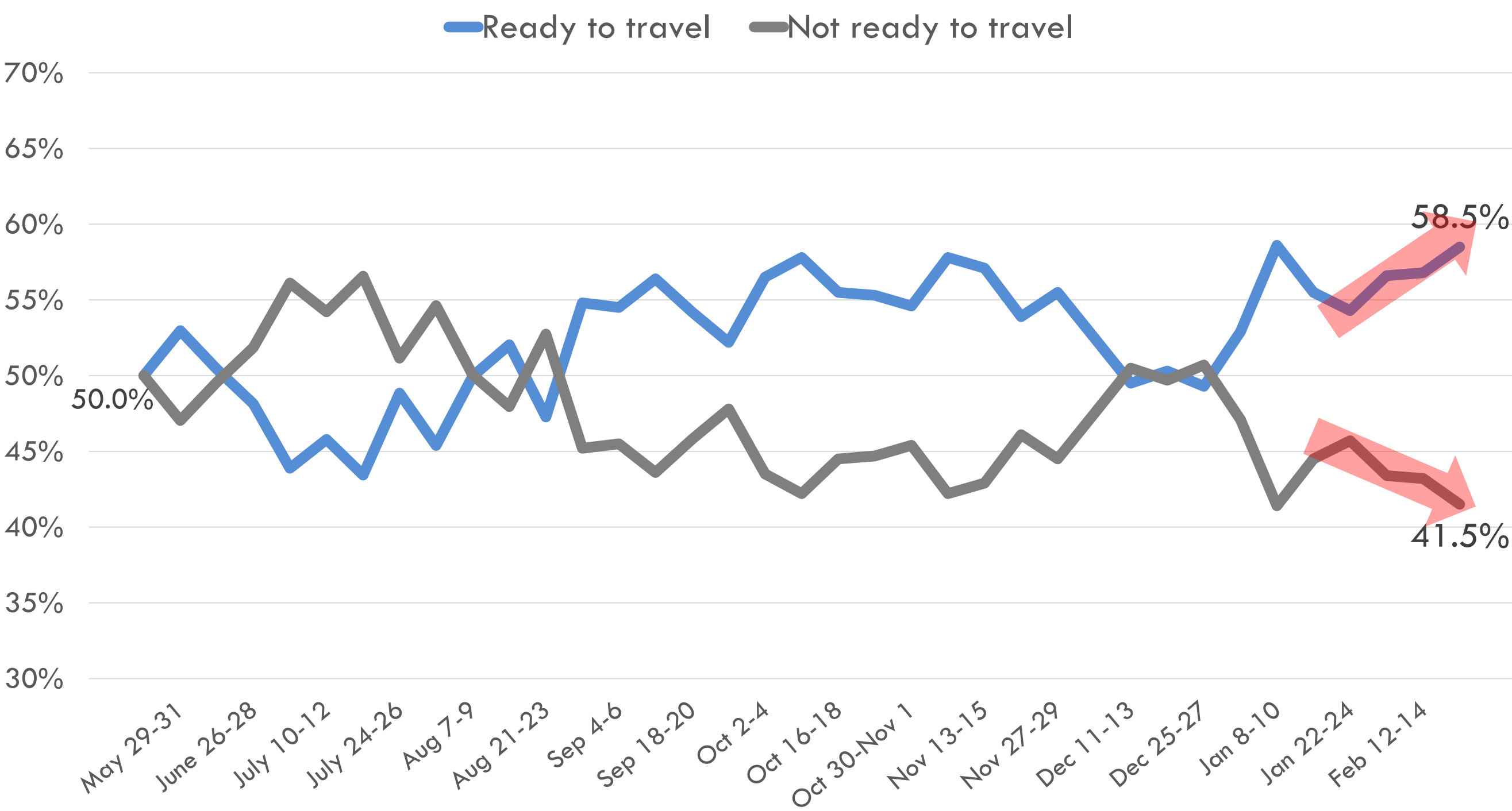
TRAVEL STATE-OF-MIND

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



(Base: Waves 12-13 and 15-49. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

Historical data



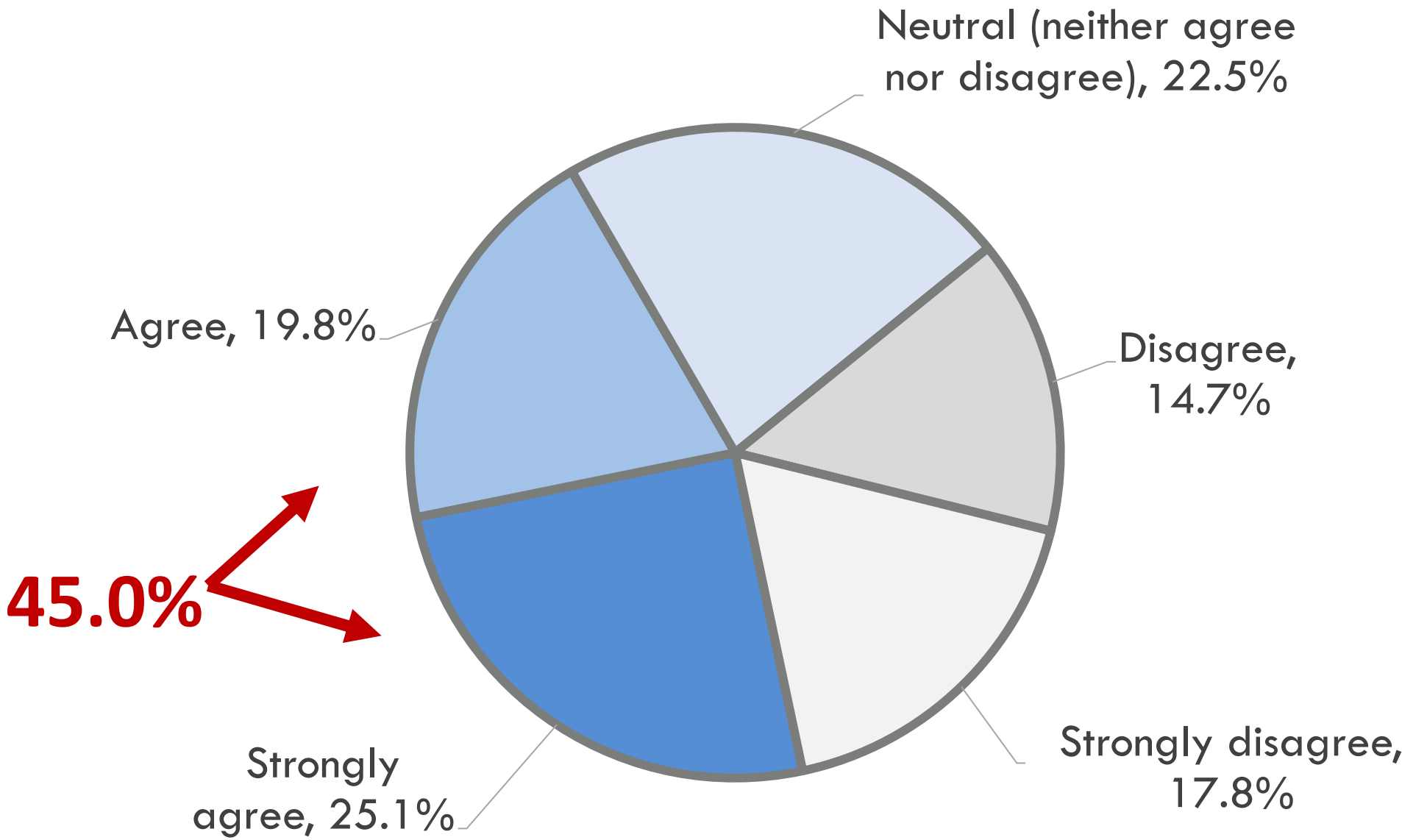


Expectations around vaccines may have regressed; yet most are still optimistic that vaccines are the path back to normalcy.

TRAVEL UNTIL GETTING THE VACCINE

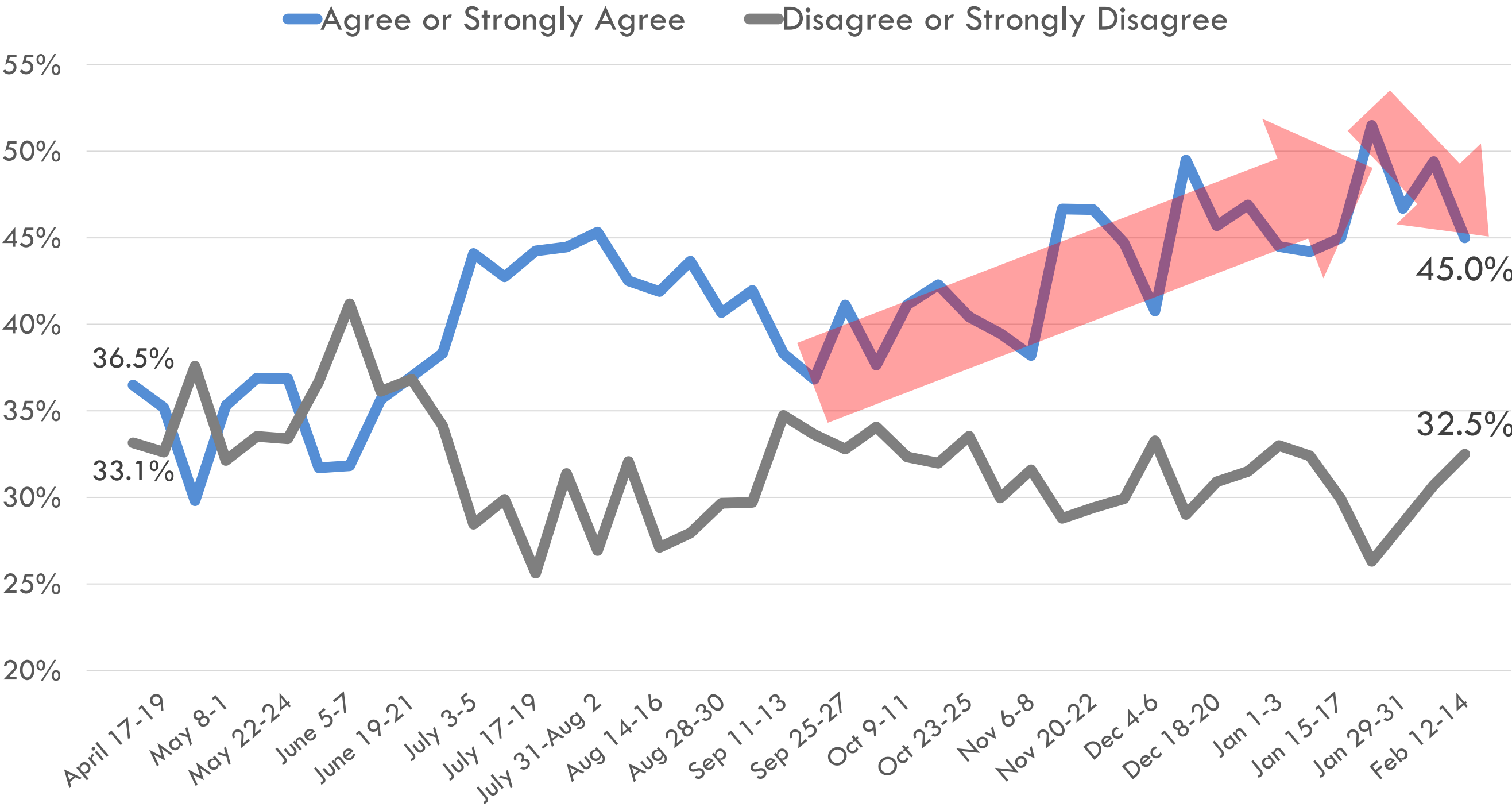
How much do you agree with the following statement?

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



(Base: Waves 6-49. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

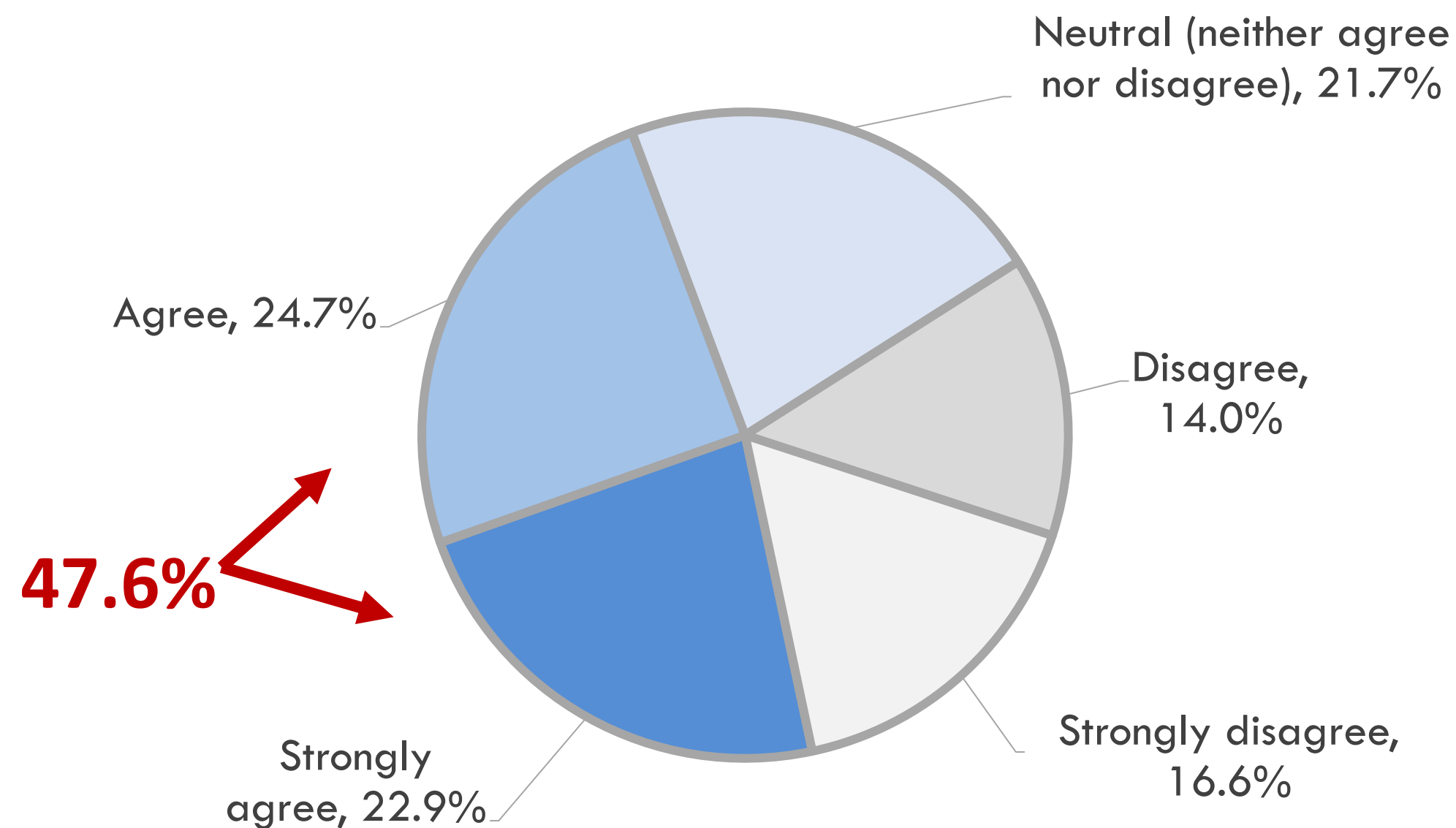
Historical data



TRAVEL UNTIL VACCINES ARE MADE WIDELY AVAILABLE

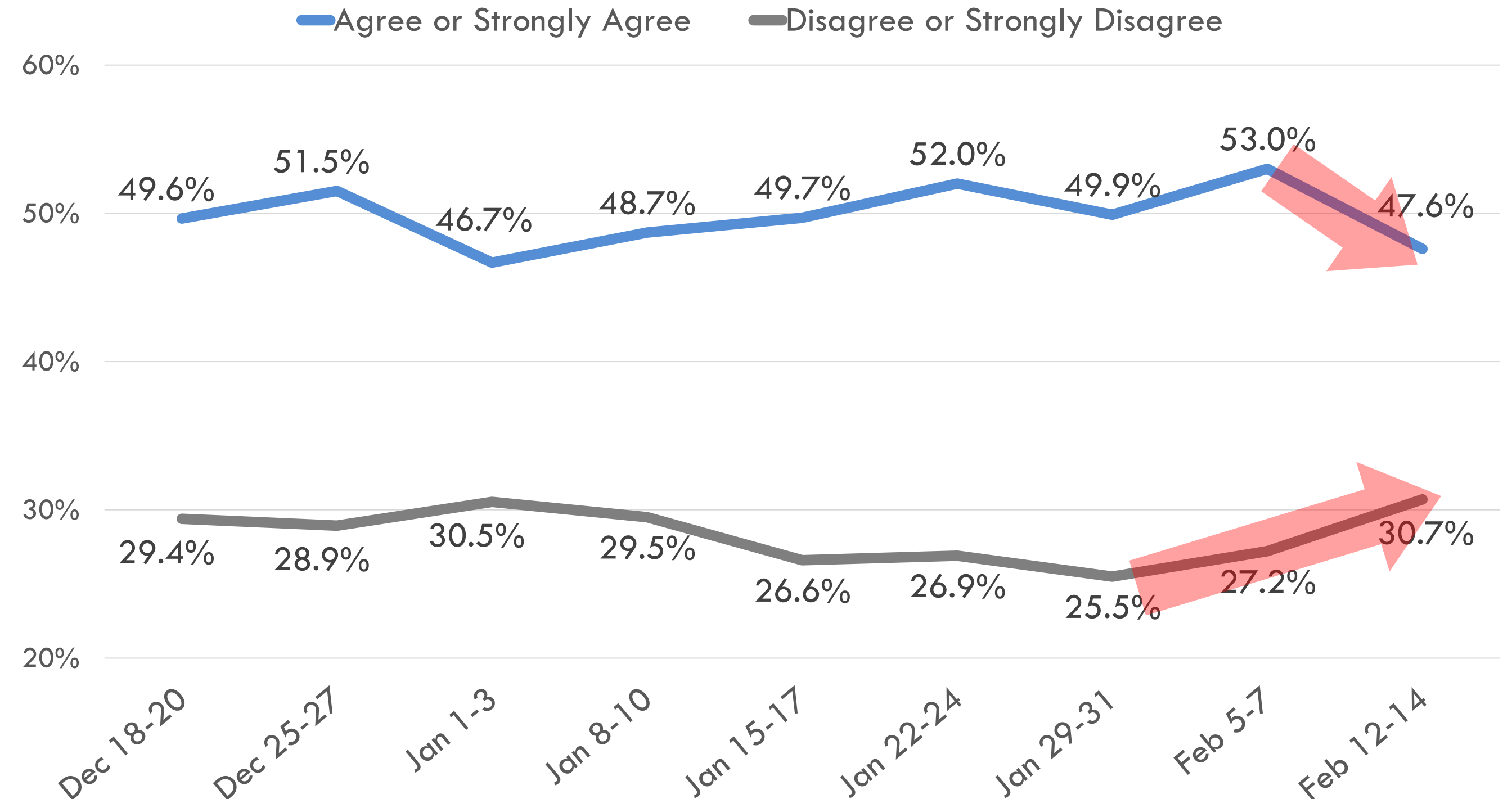
How much do you agree with the following statement?

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



(Base: Waves 41-49. All respondents, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

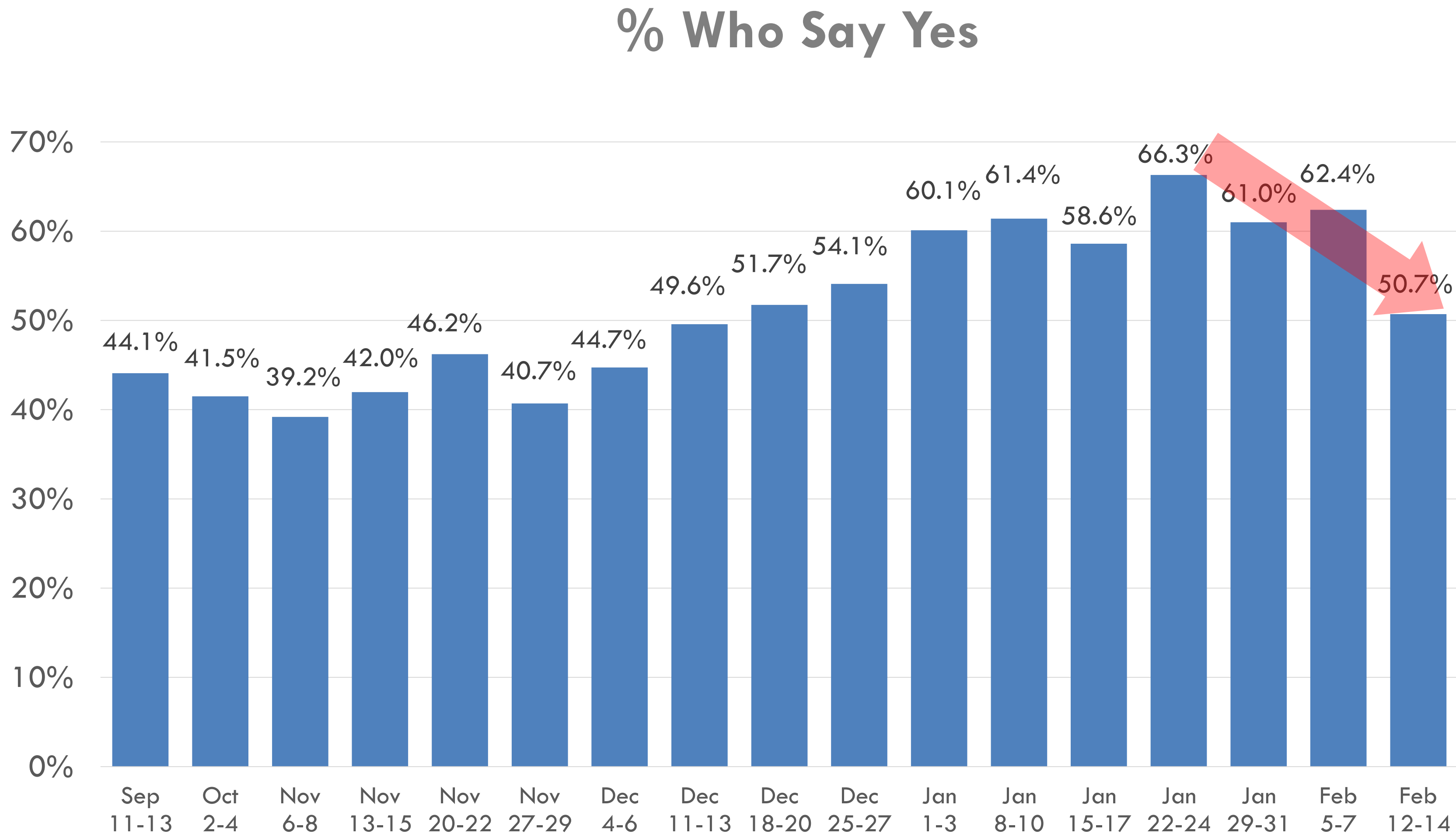
Historical data



EXPECTATIONS TO TAKE A COVID-19 VACCINE

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

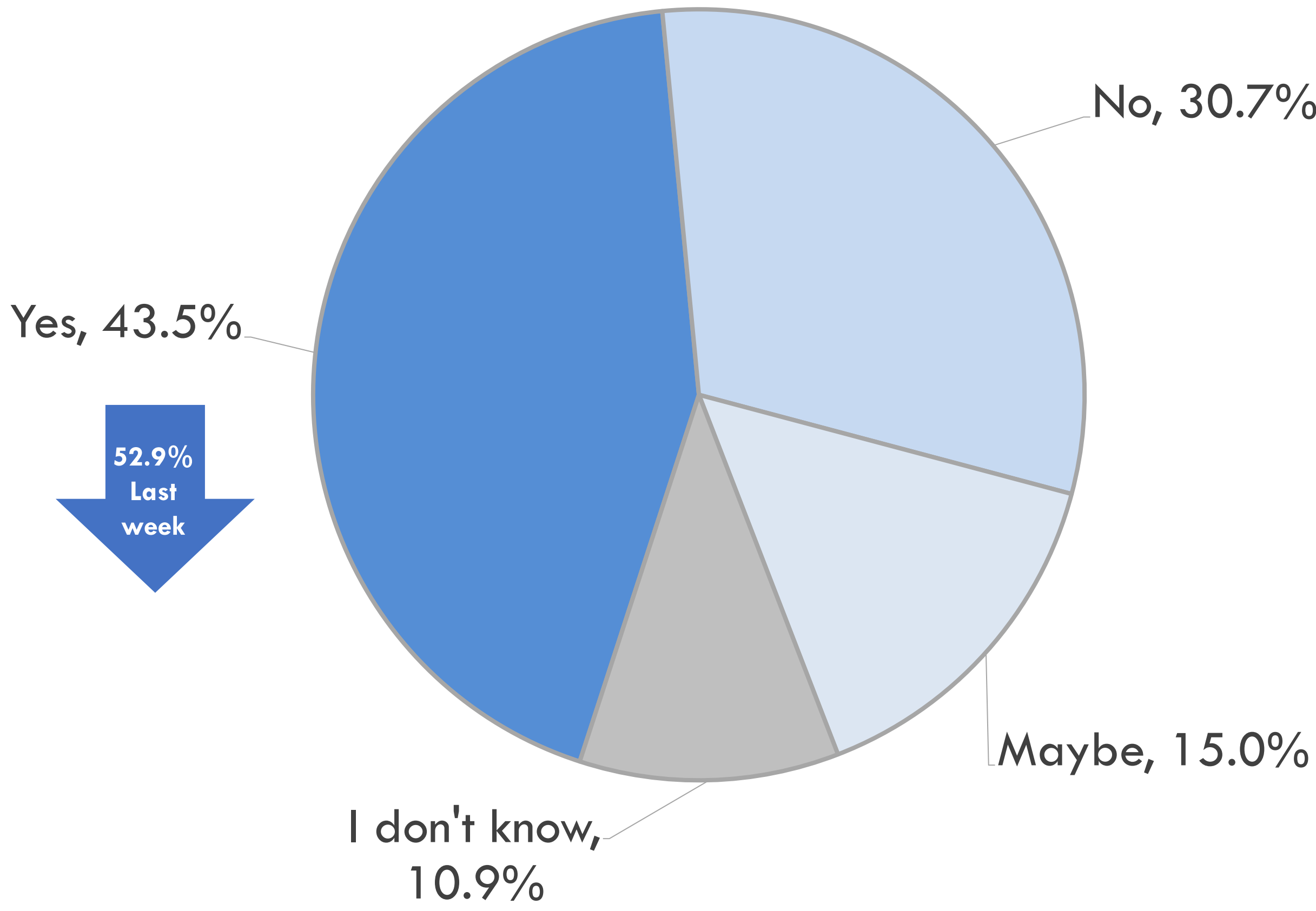
(Base: Waves 27, 30, 35-49 data. All respondents, 1,205, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)



VACCINES FOR CHILDREN

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

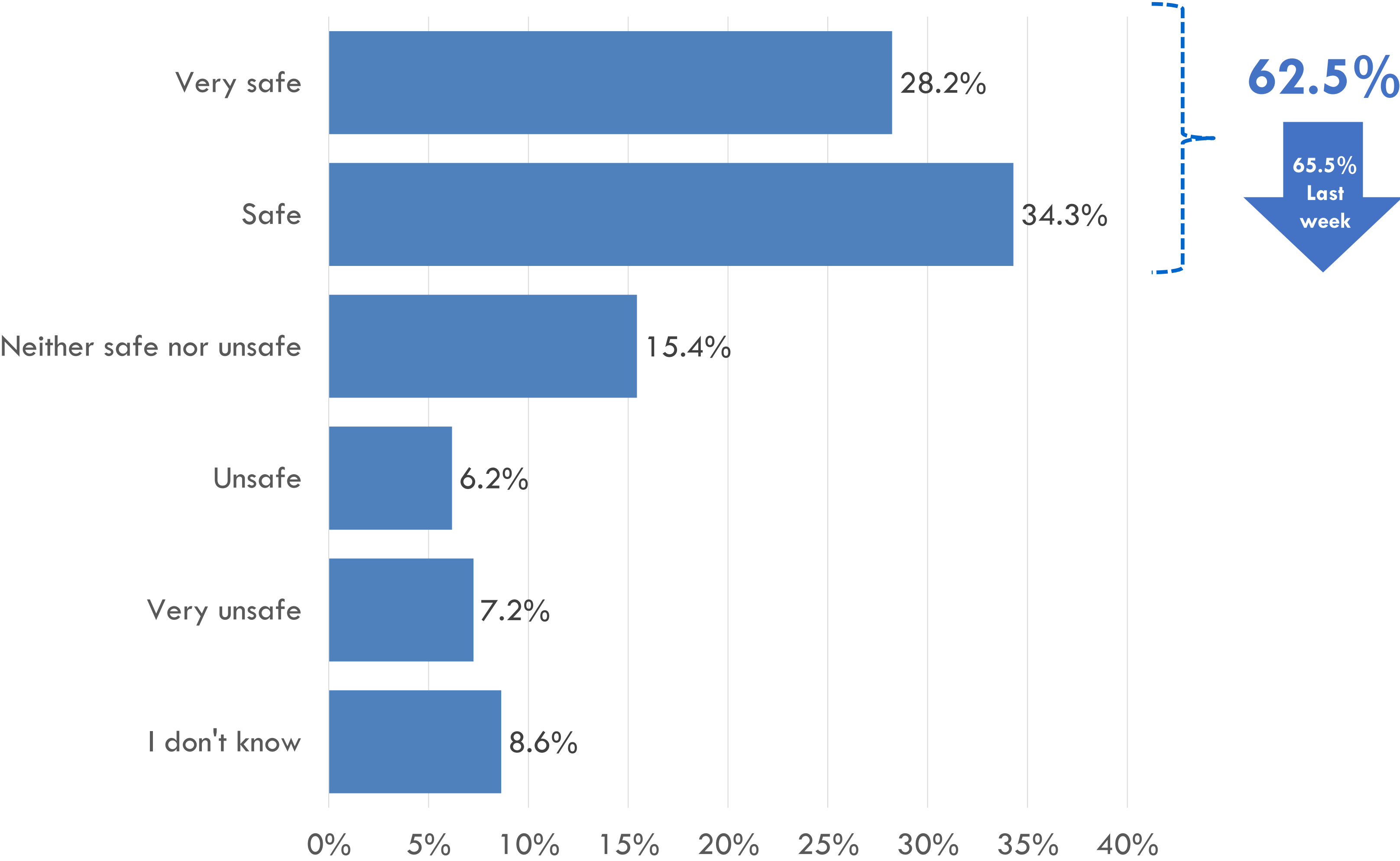
(Base: Wave 49 data. All respondents with school-aged children, 379 completed surveys.
Data collected February 12-14, 2021)



EXPECTED SAFETY OF COVID-19 VACCINES

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

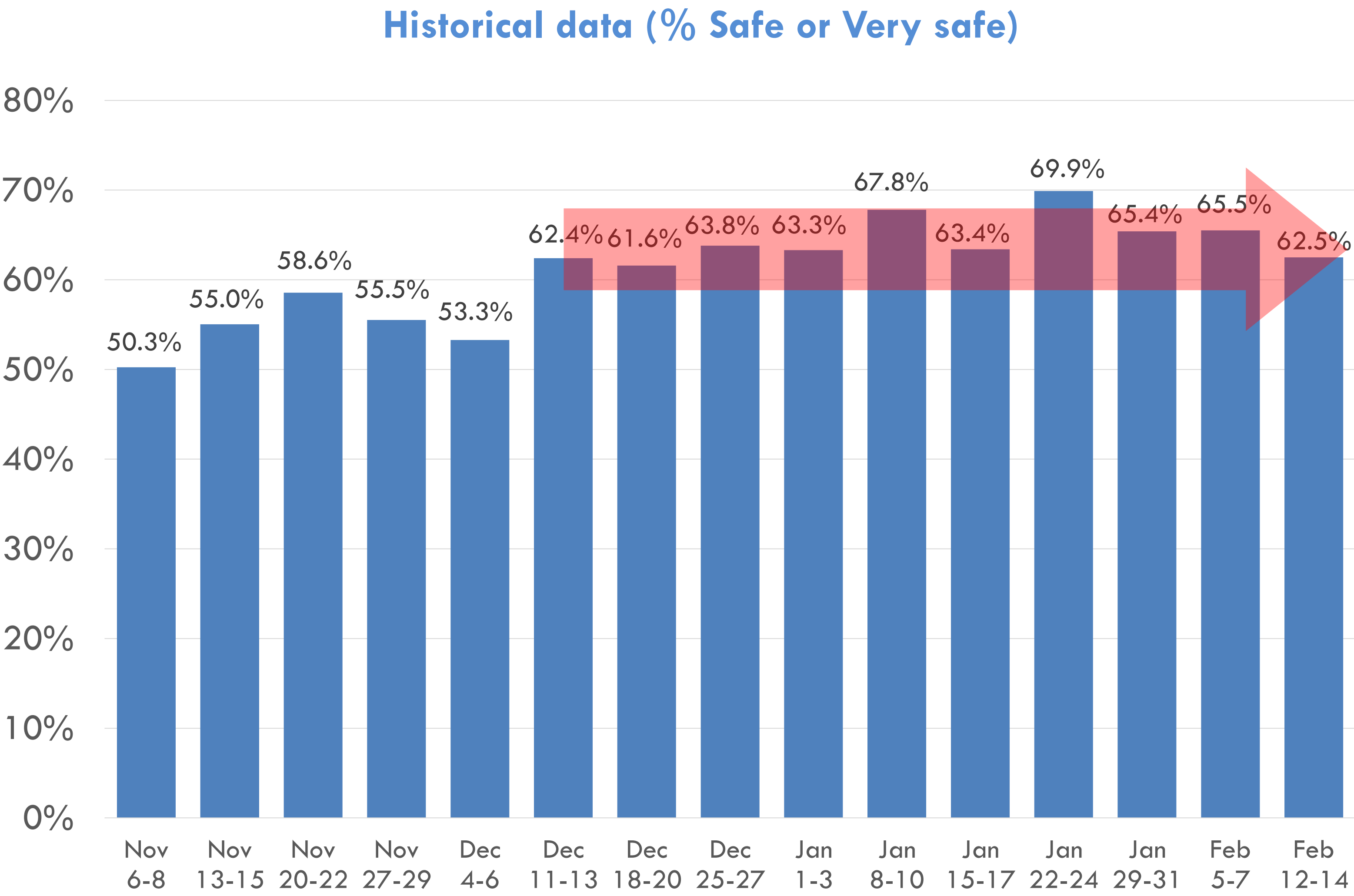
(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



EXPECTED SAFETY OF COVID-19 VACCINES

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

(Base: Waves 35-49 data. All respondents, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

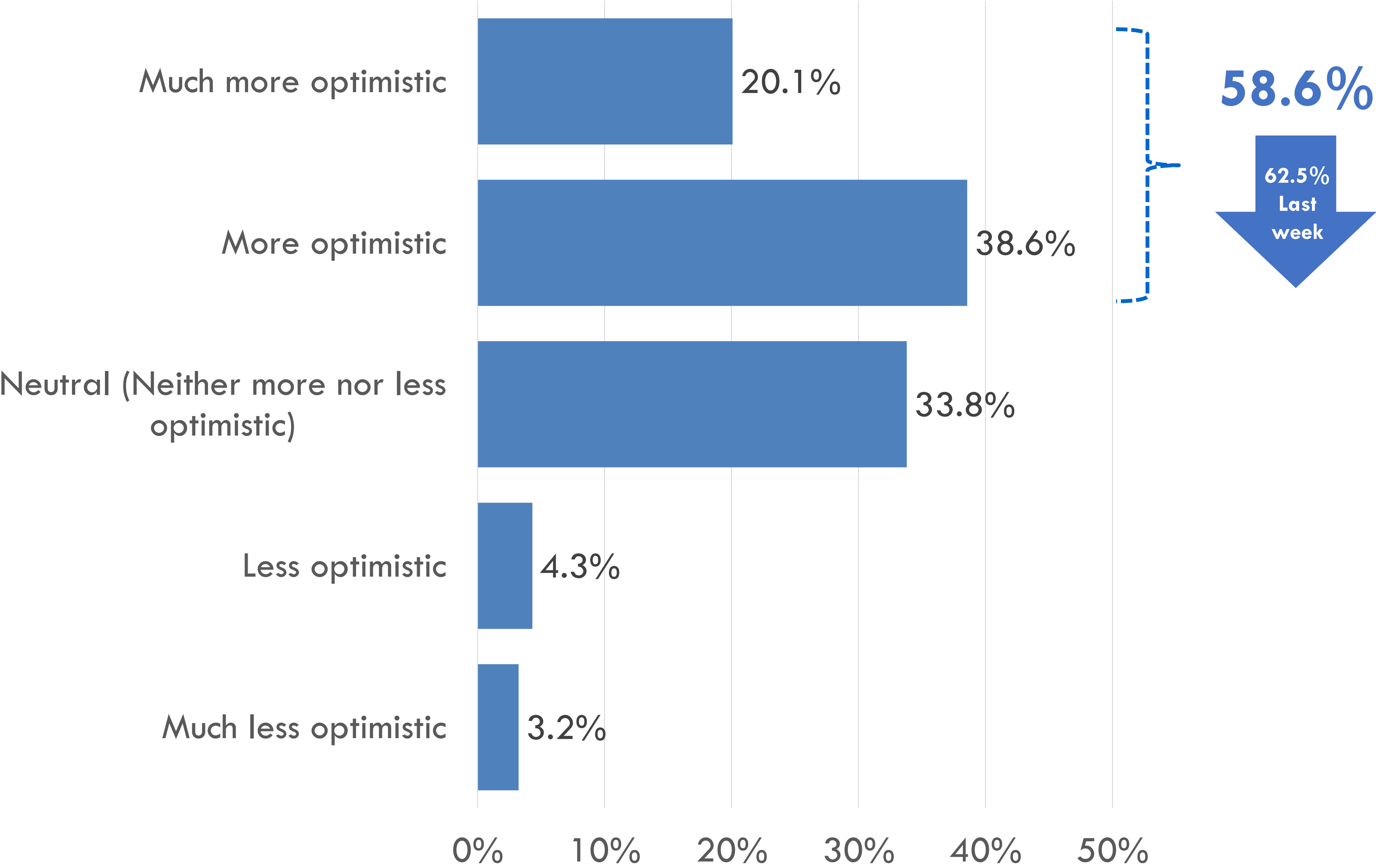


VACCINES AND OPTIMISM FOR A RETURN TO NORMAL

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: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

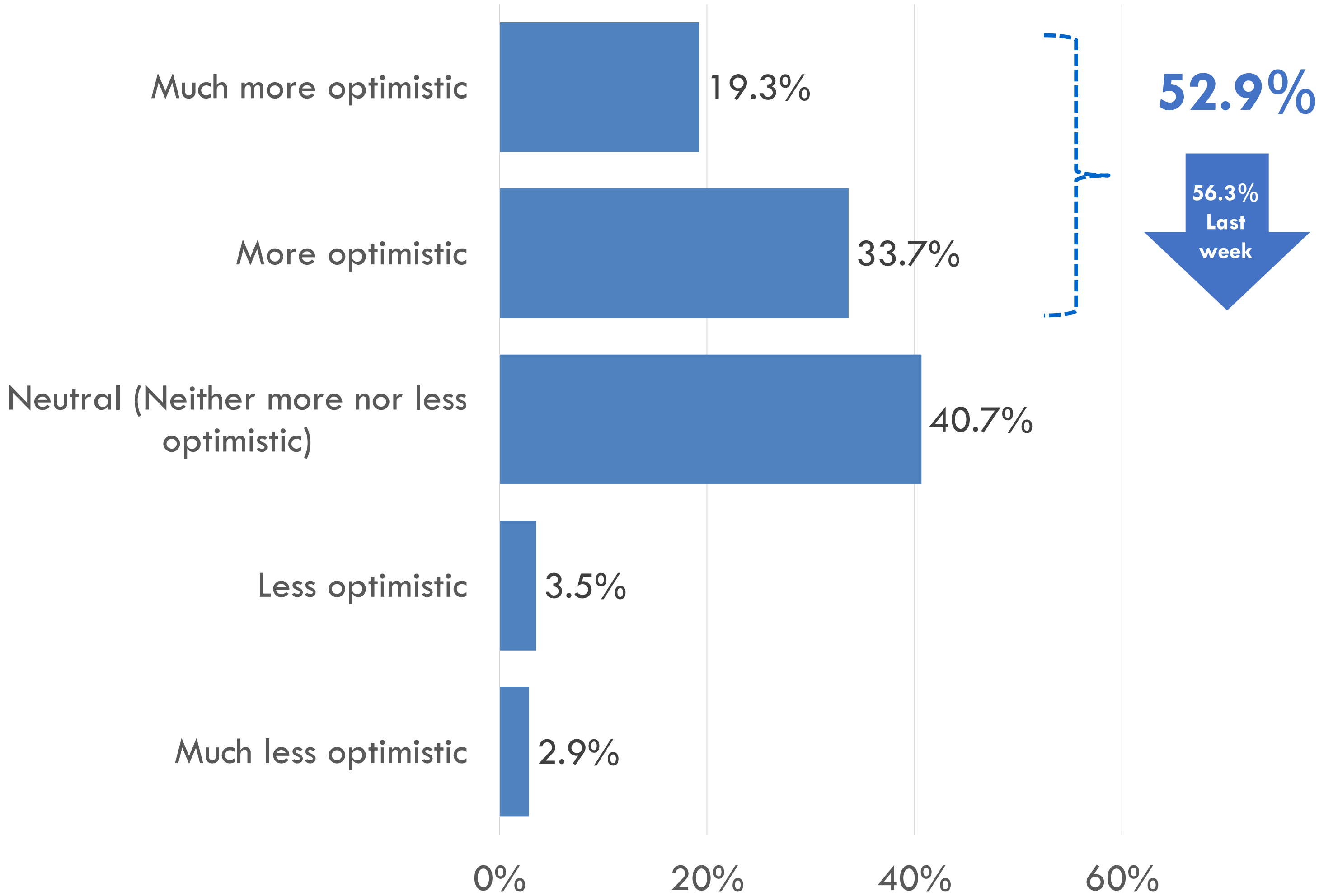


VACCINES AND OPTIMISM FOR SAFE TRAVEL

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: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



TRAVEL PLANS SPECIFICALLY DUE TO COVID-19 VACCINES

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

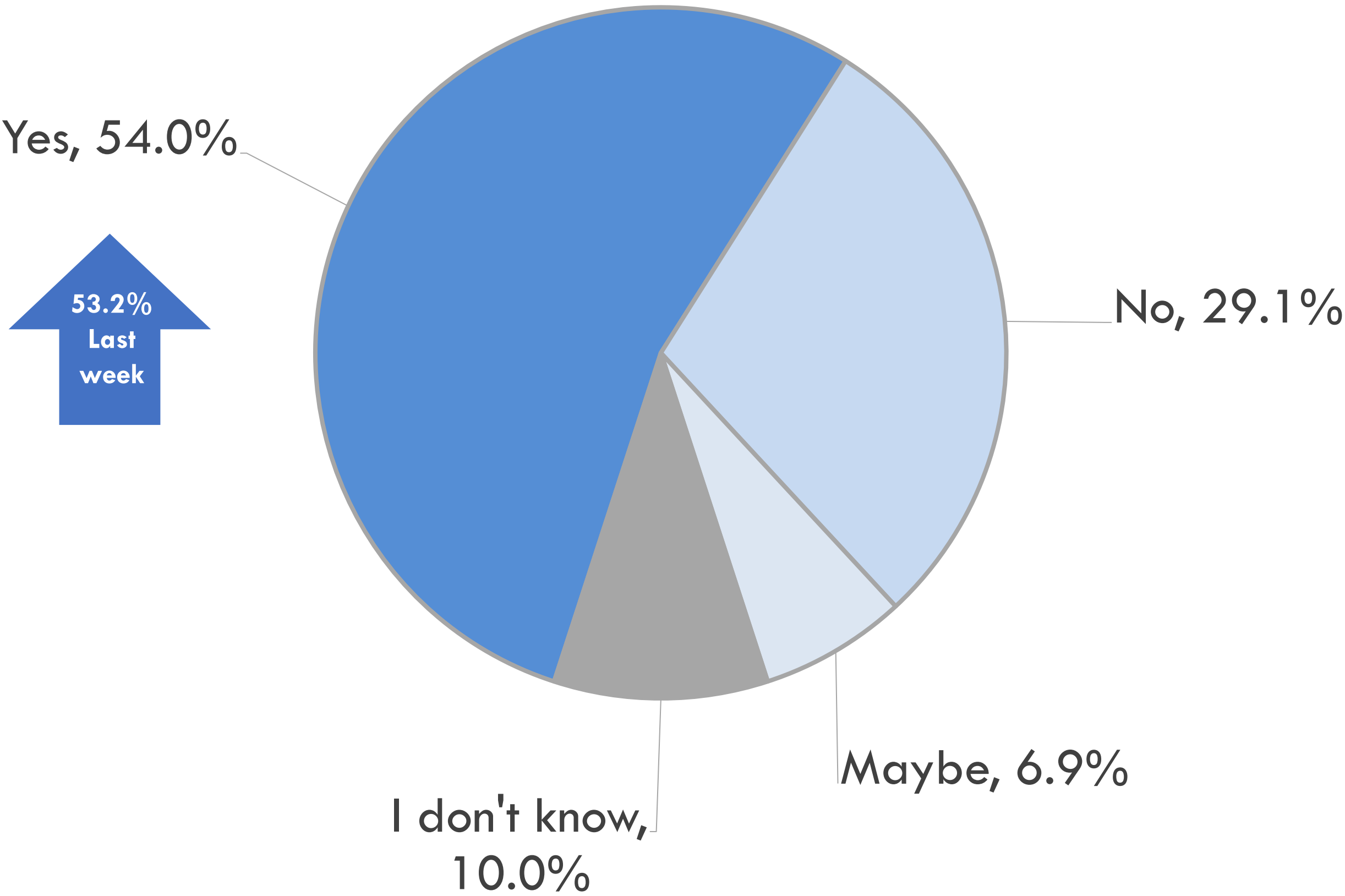
(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



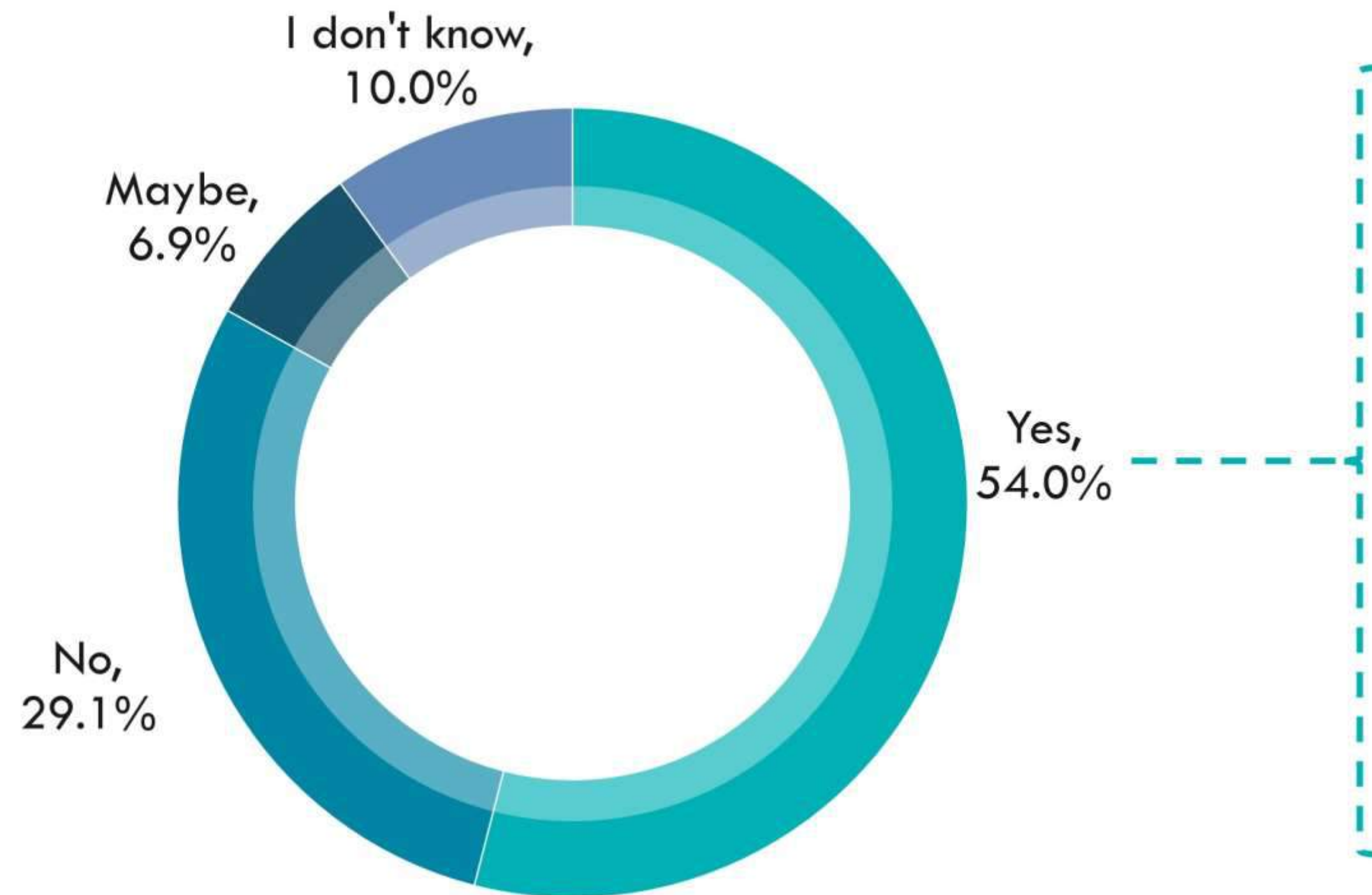
FRIENDS OR RELATIVES RECEIVING A COVID-19 VACCINE

Question: Have any of your friends or relatives already received a COVID-19 vaccine?

(Base: Wave 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



AMERICAN TRAVELERS WITH FRIENDS OR RELATIVES THAT HAVE RECEIVED A COVID-19 VACCINE AS OF FEBRUARY 14, 2021



By Generation:

Millennials: 46.9%

Gen X: 51.8%

Boomers: 62.4%

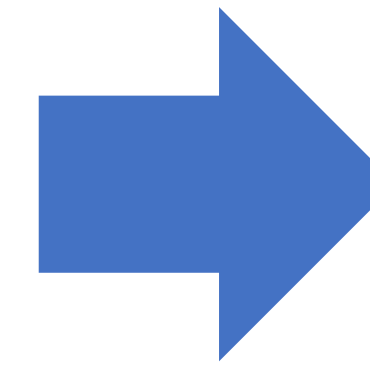
By Region:

West: 57.6%

Midwest: 60.2%

Northeast: 55.7%

South: 47.4%



- More optimistic
- Doing more travel dreaming
- Planning more trips this year

QUESTION: HAVE ANY OF YOUR FRIENDS OR RELATIVES ALREADY RECEIVED A COVID-19 VACCINE?

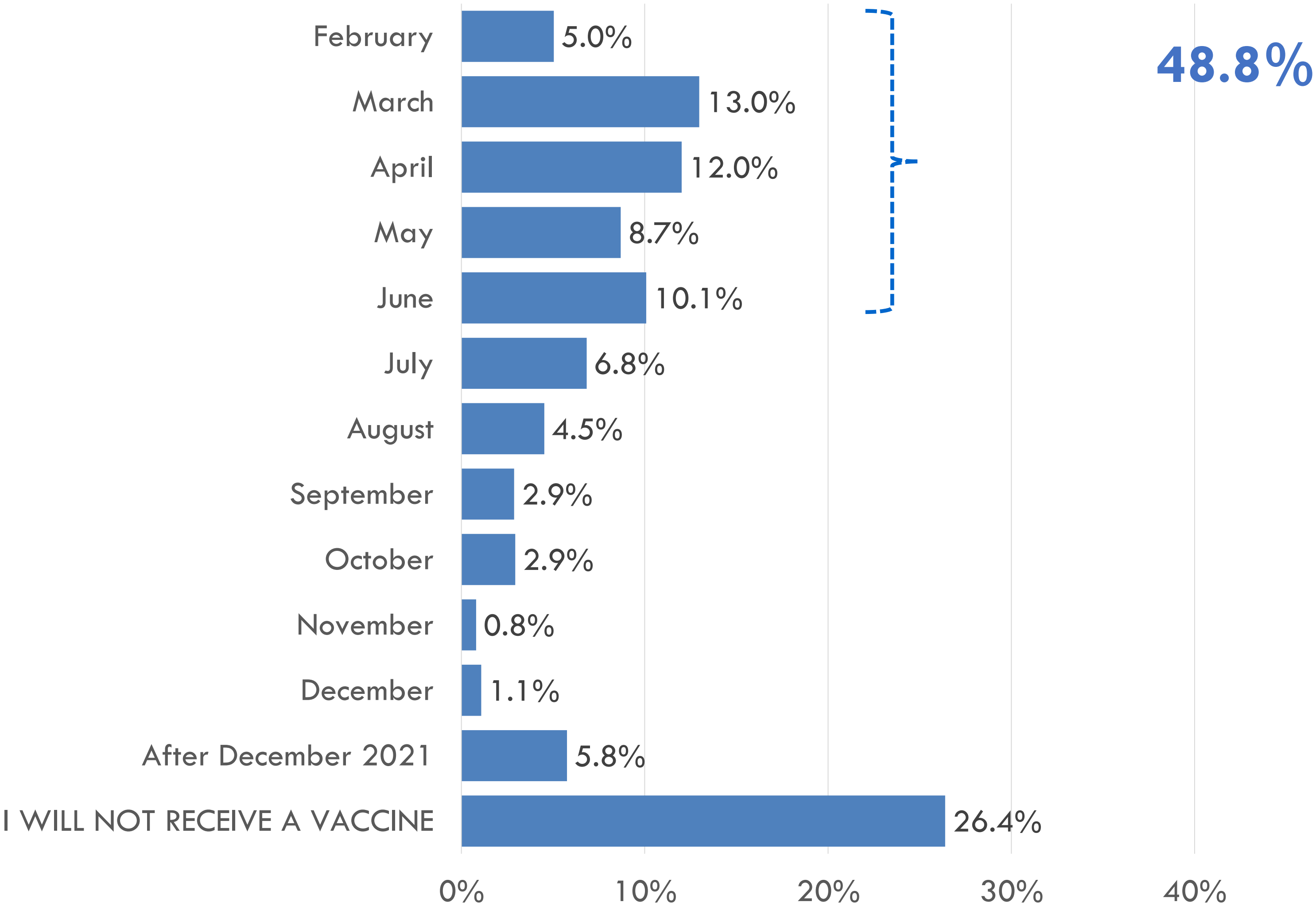
(Base: Wave 49 data. All respondents, 1,216 completed surveys.
Data collected February 12-14, 2021)

EXPECTED MONTH OF VACCINATION (AMONG THOSE NOT YET VACCINATED)

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)

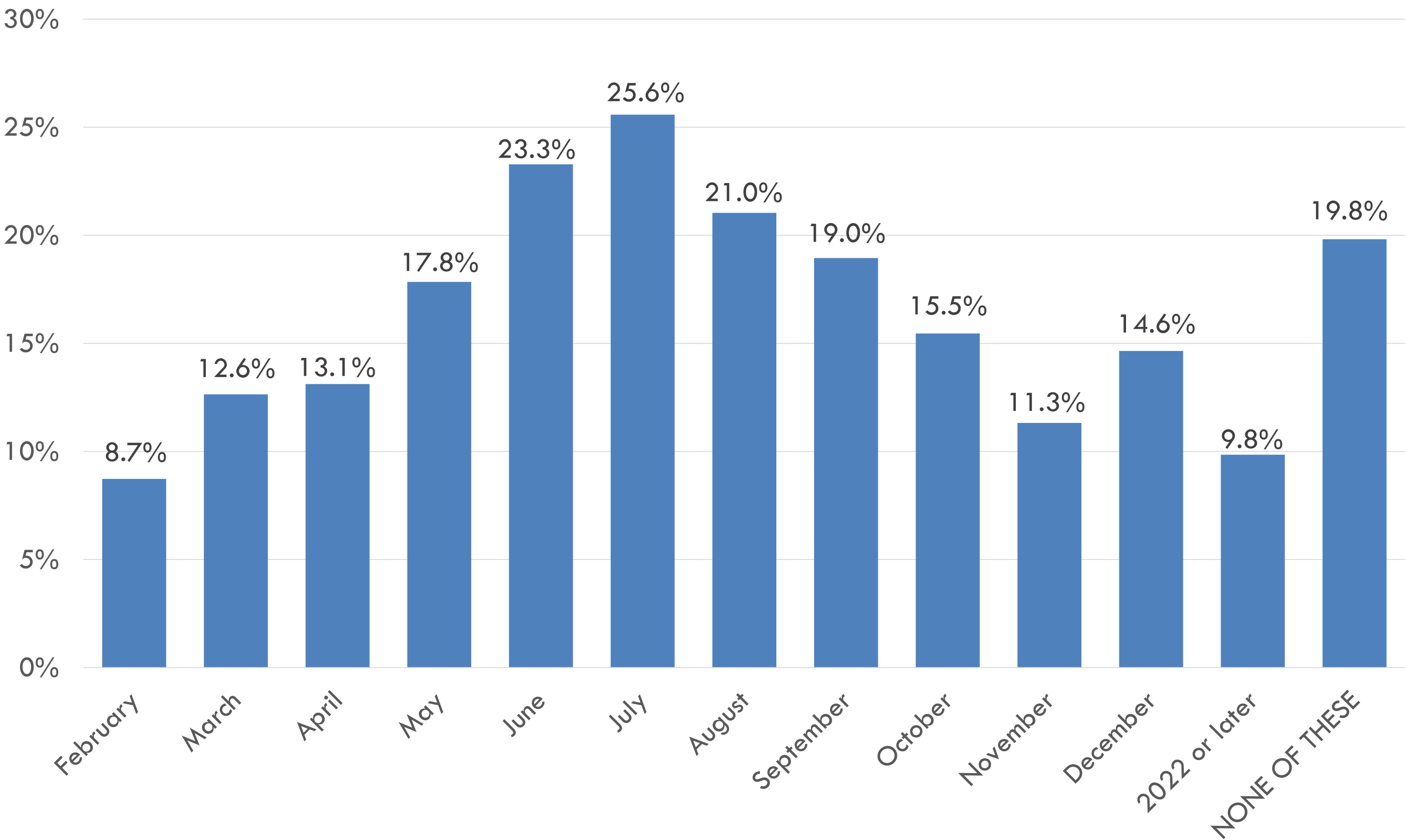
(Base: Wave 49 data. Respondents who have not yet been vaccinated, 965 completed surveys. Data collected February 12-14, 2021)

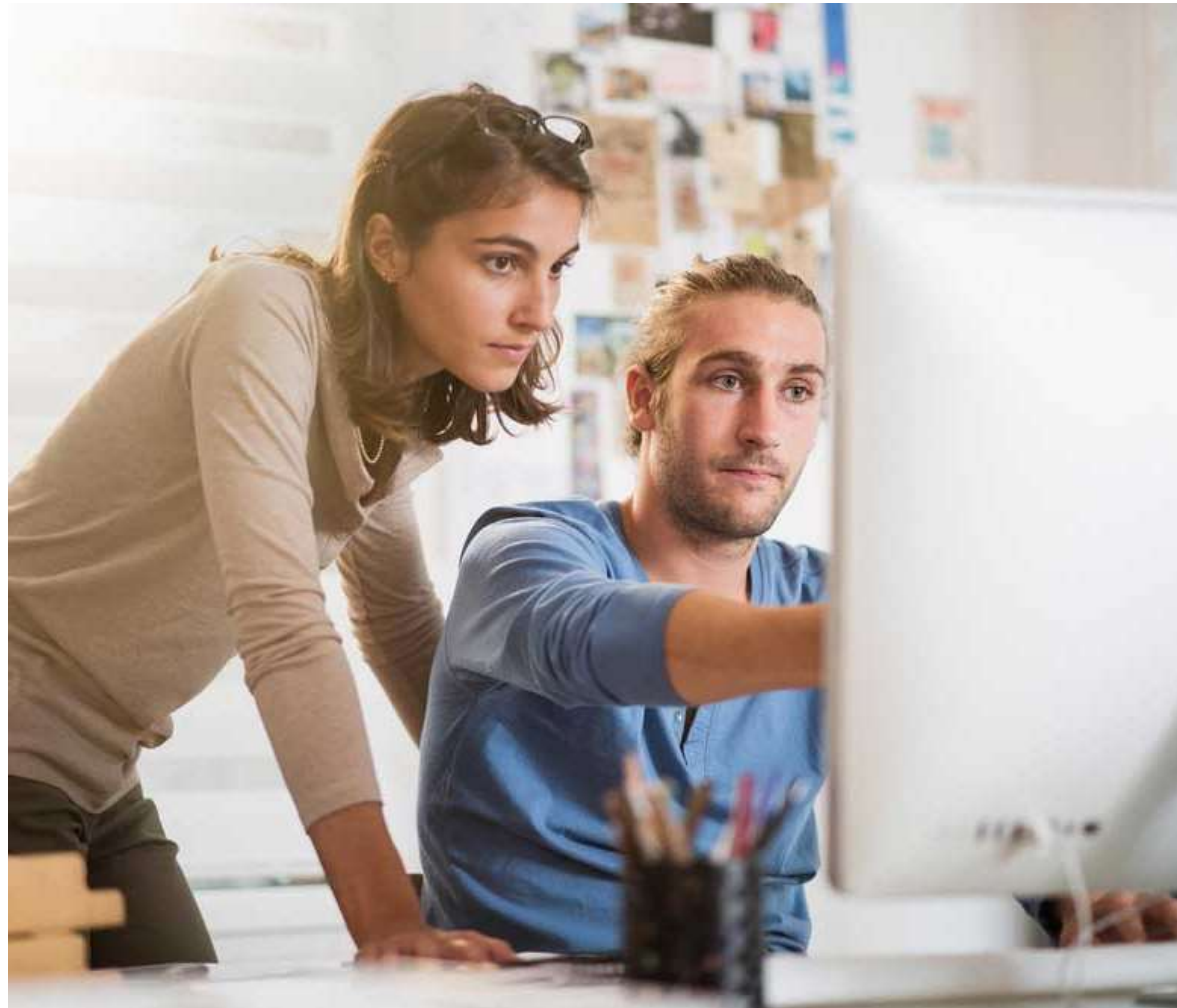


MONTHS OF EXPECTED LEISURE TRIPS IN 2021

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

(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



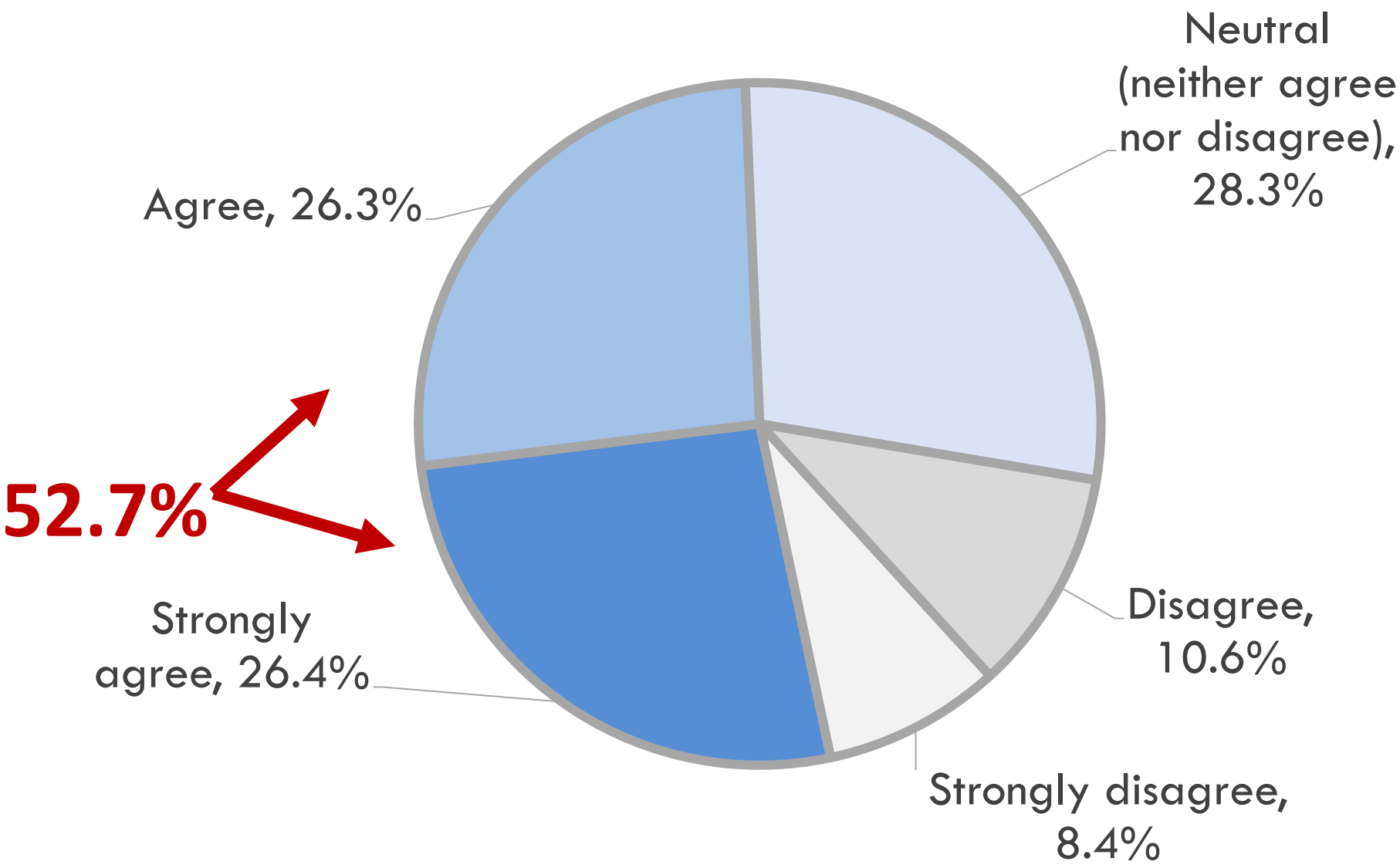


Travelers are warming to advertising messaging, and prefer to see such ads online, on social media, on TV and in magazines.

TRAVELERS IN COMMUNITY ARE UNWANTED

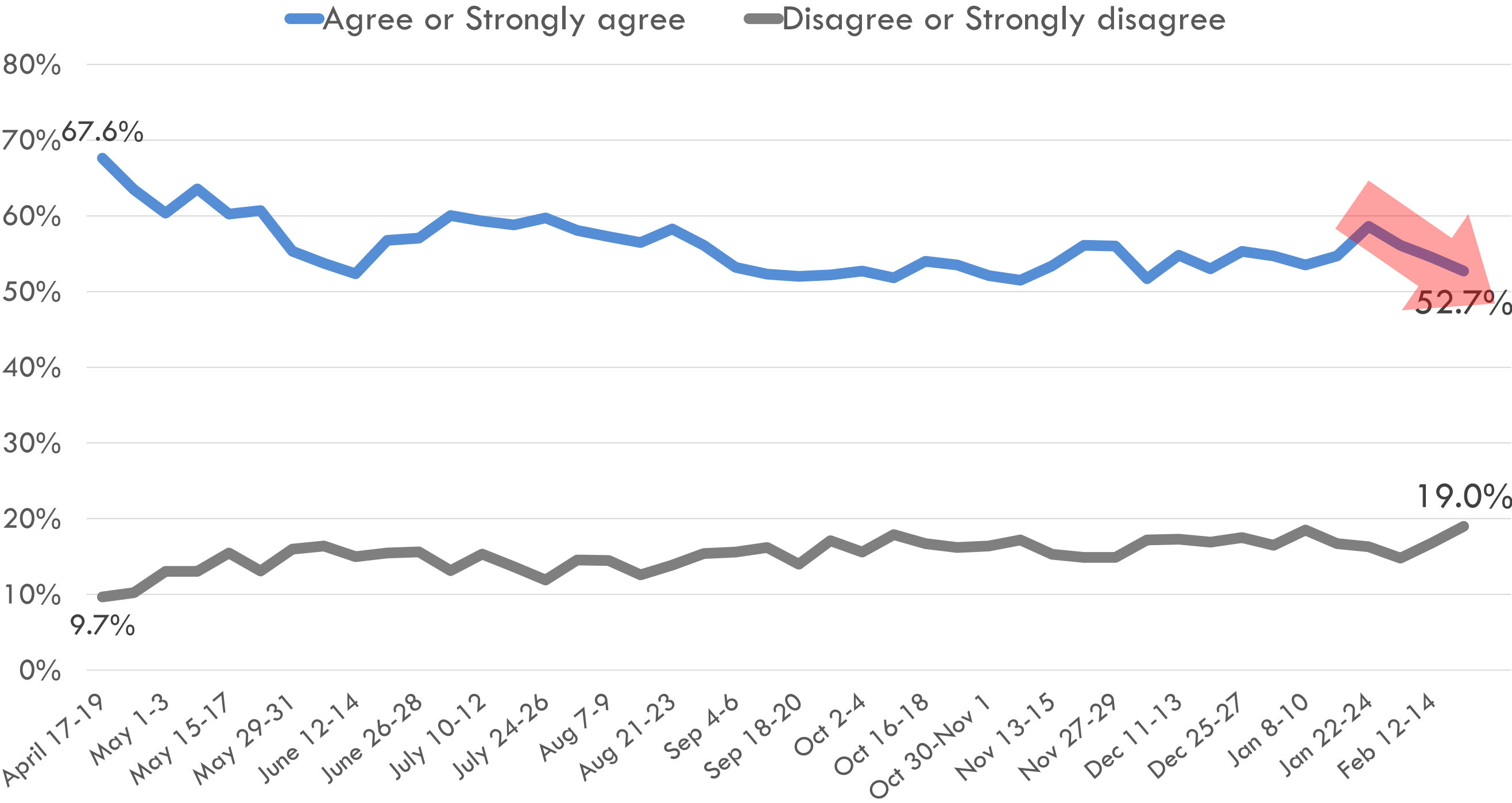
How much do you agree with the following statement?

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



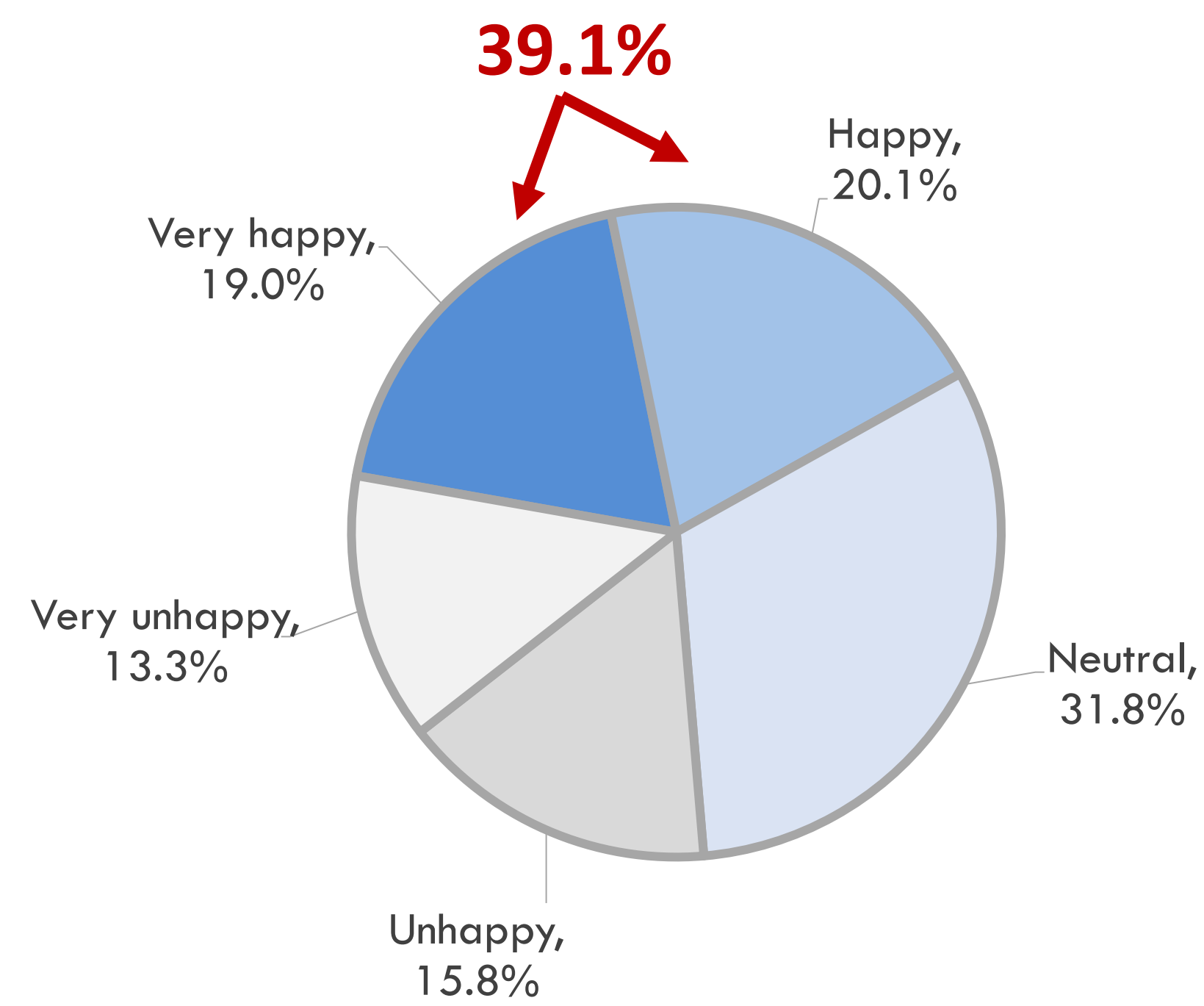
(Base: Waves 6-49. All respondents, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

Historical data

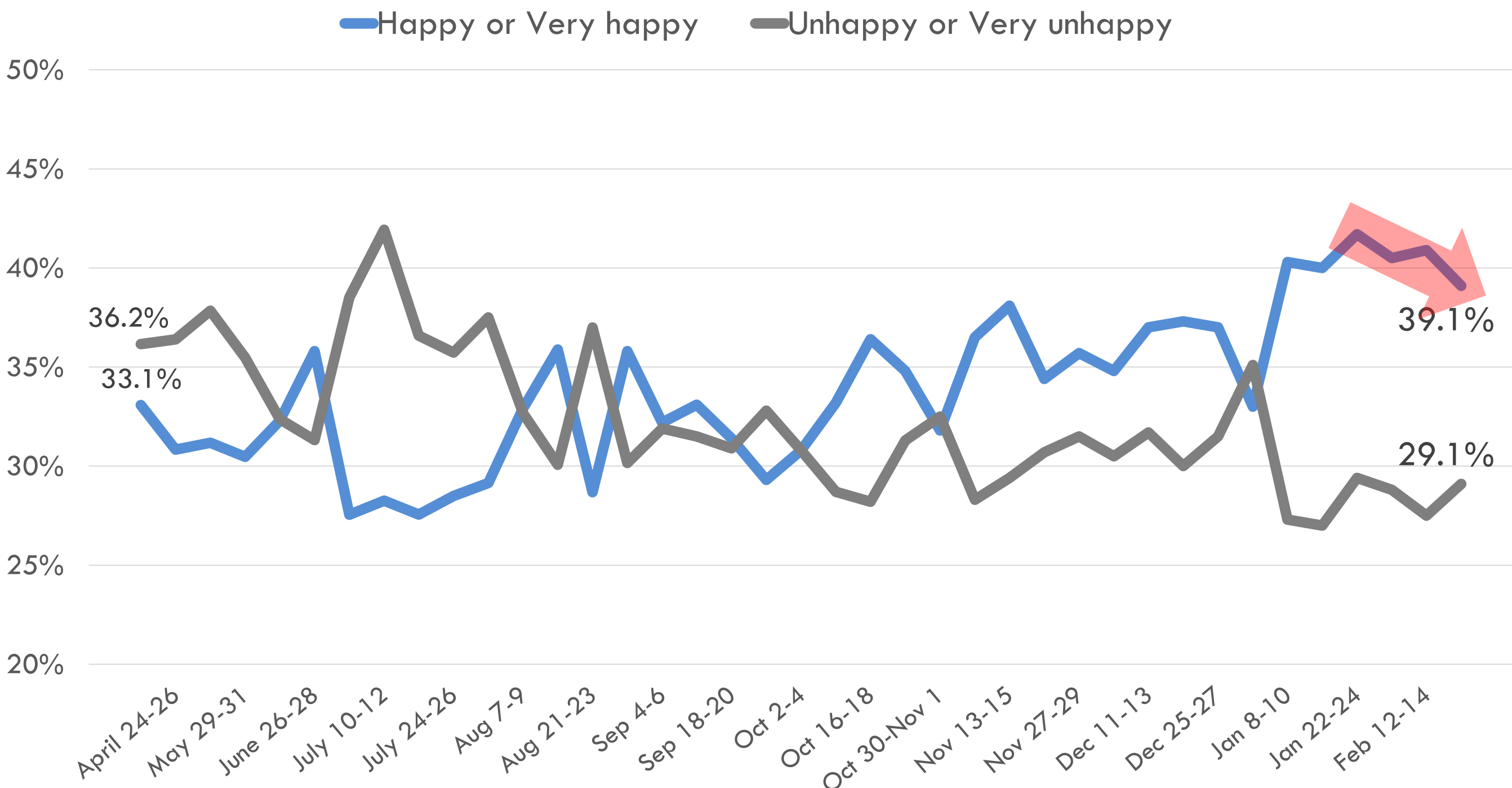


FEELINGS SEEING AN AD PROMOTING TOURISM TO COMMUNITY

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?



Historical data

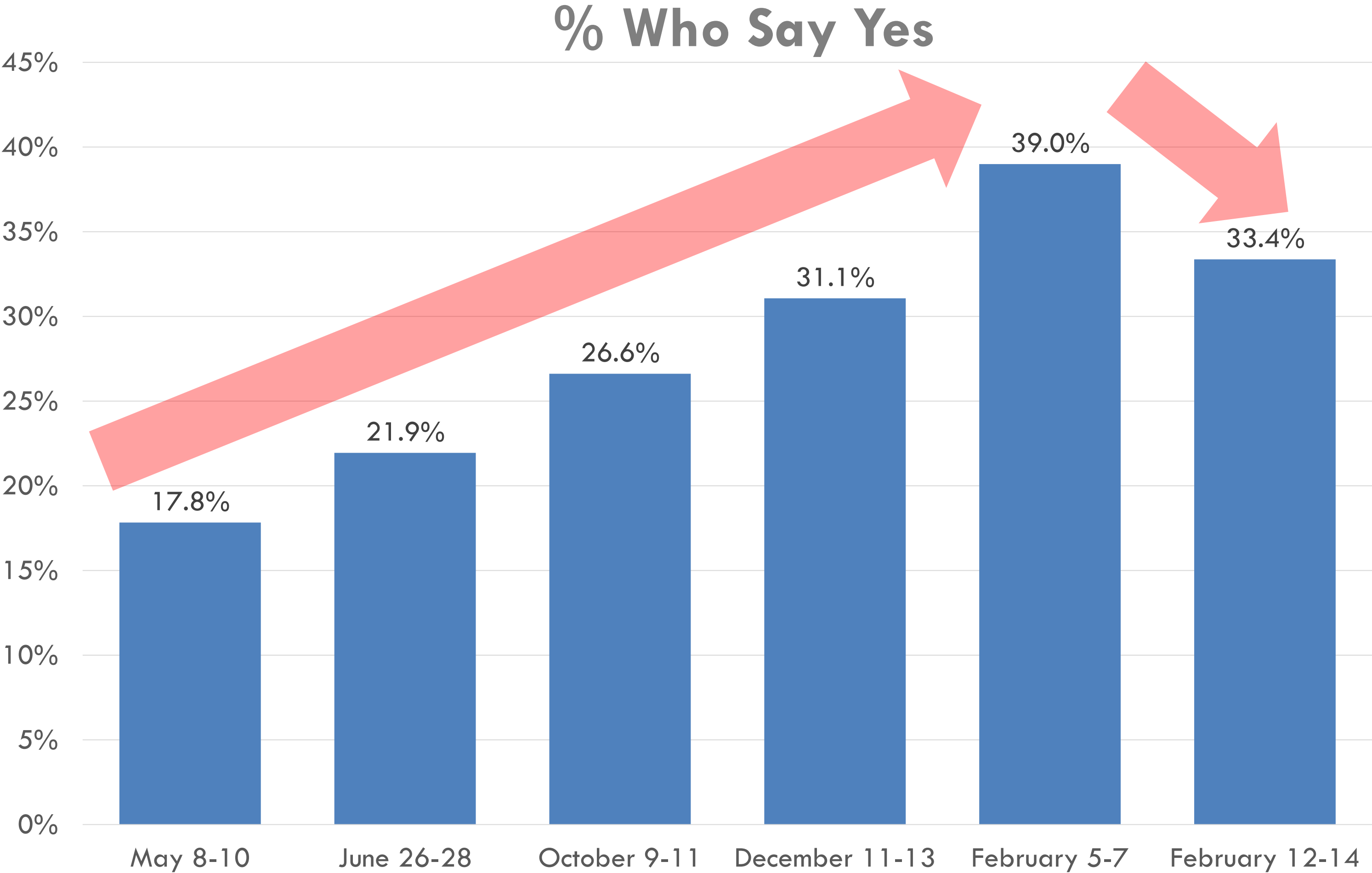


(Base: Waves 7-9, 12-13 and 16-49. All respondents, 1,198 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209 and 1,216 completed surveys.)

DESTINATION ADVERTISING SEEN IN PAST MONTH

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

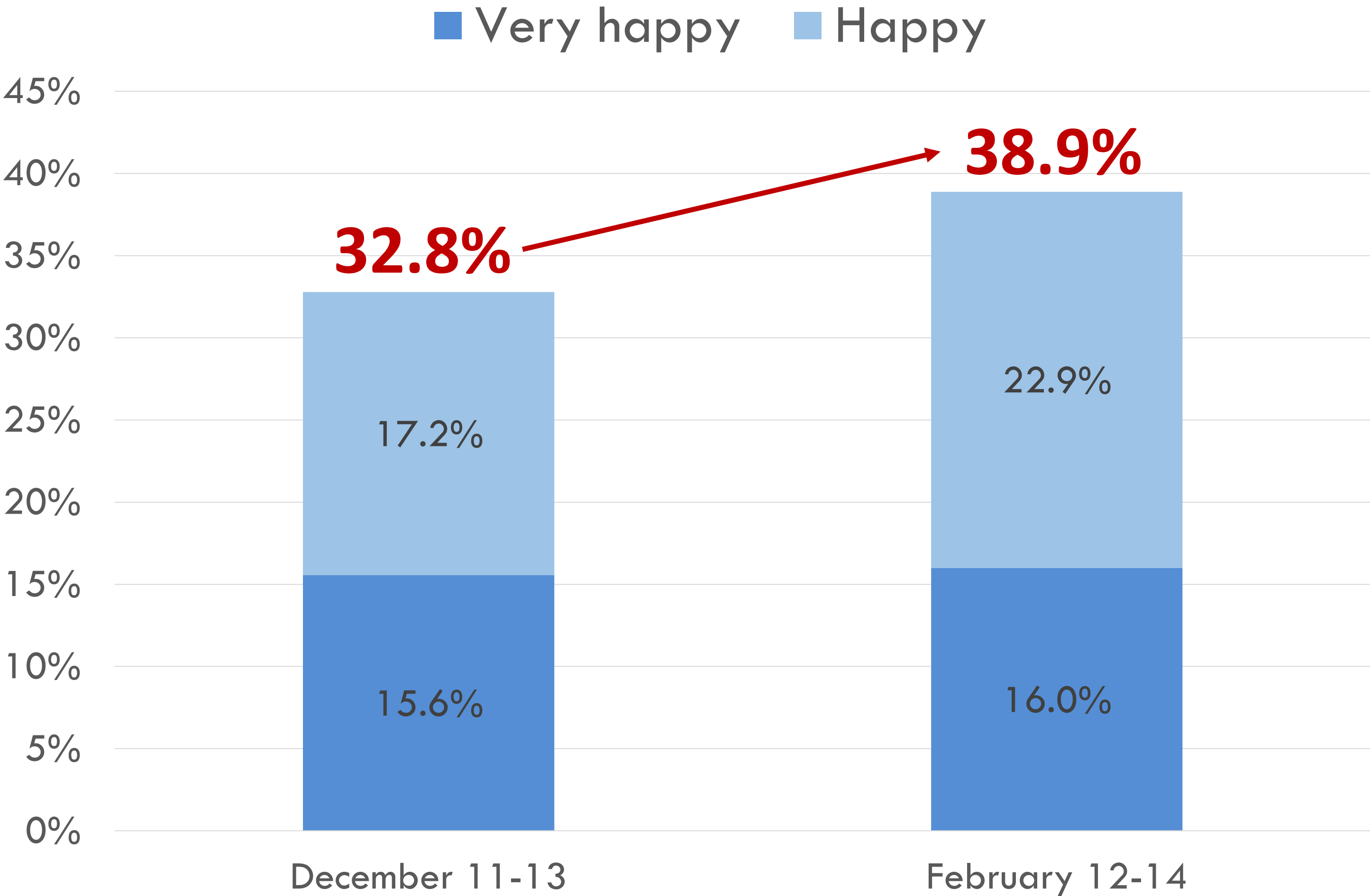
(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



FEELINGS ABOUT SEEING MOST RECENT DESTINATION AD

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

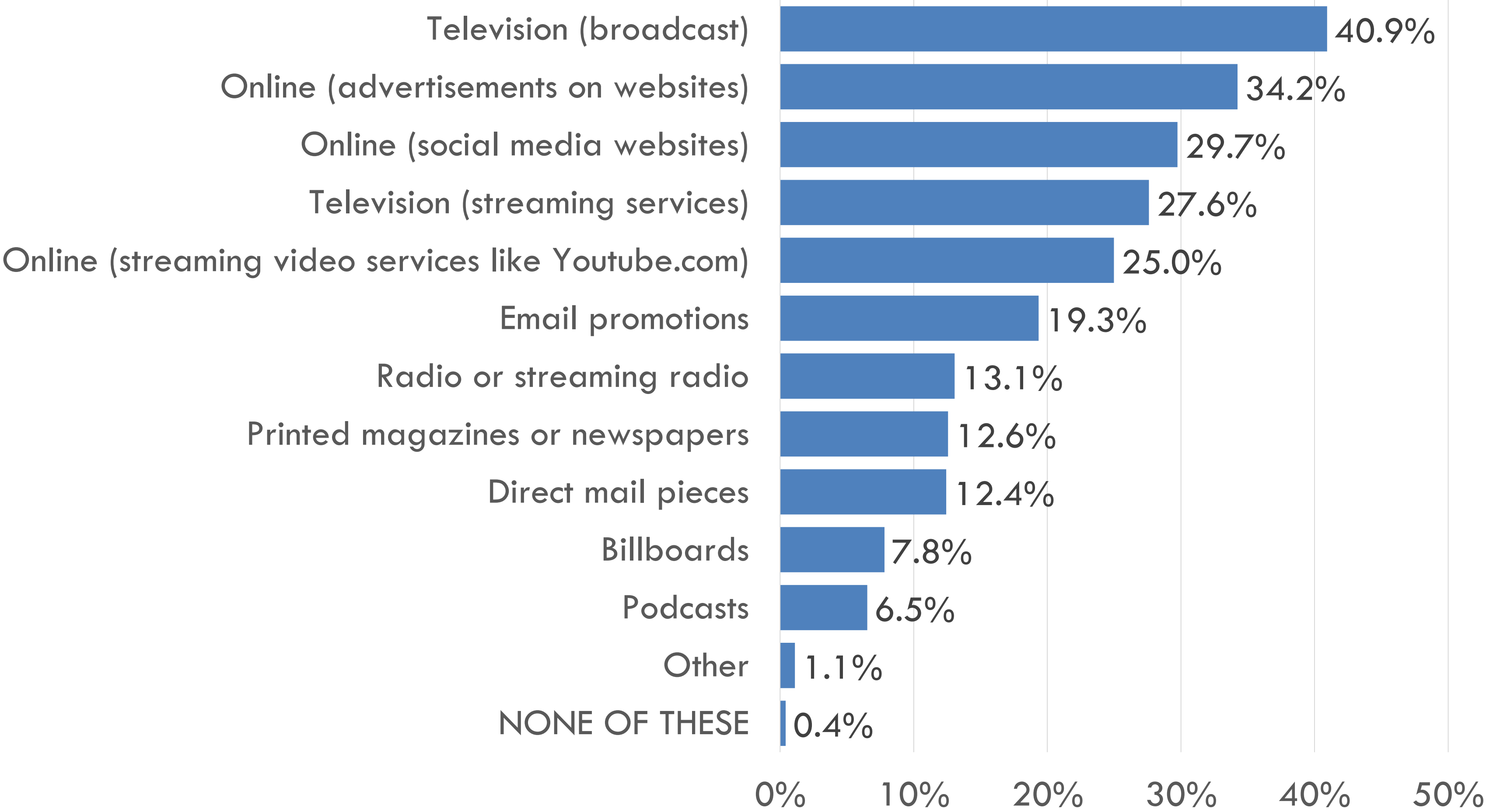
(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



WHERE ADVERTISEMENT WAS SEEN

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

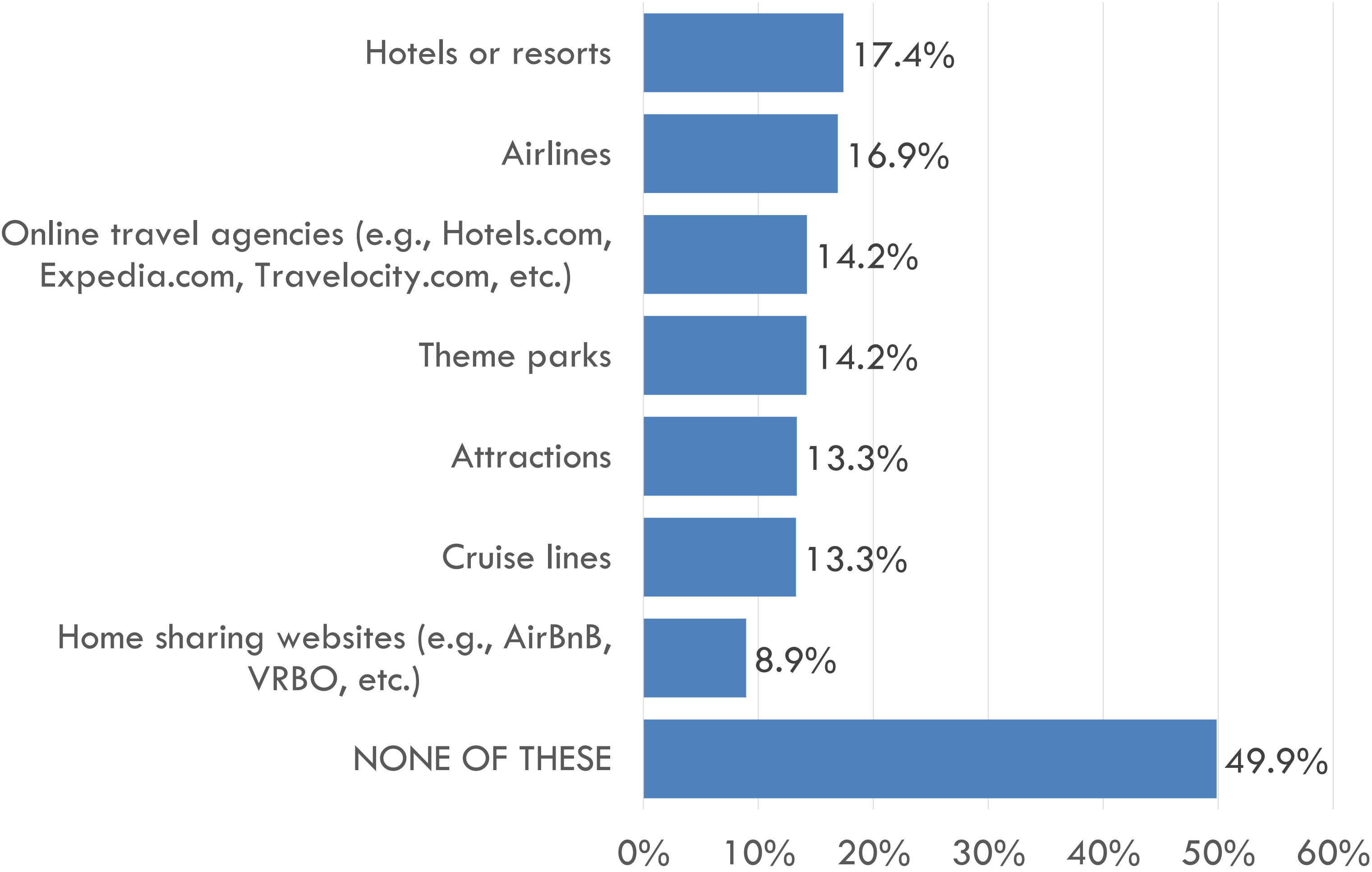
(Base: Waves 49 data. Respondents who recall seeing a destination ad in the mast month, 401 completed surveys. Data collected February 12-14, 2021)



OTHER TRAVEL ADS SEEN IN PAST MONTH

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

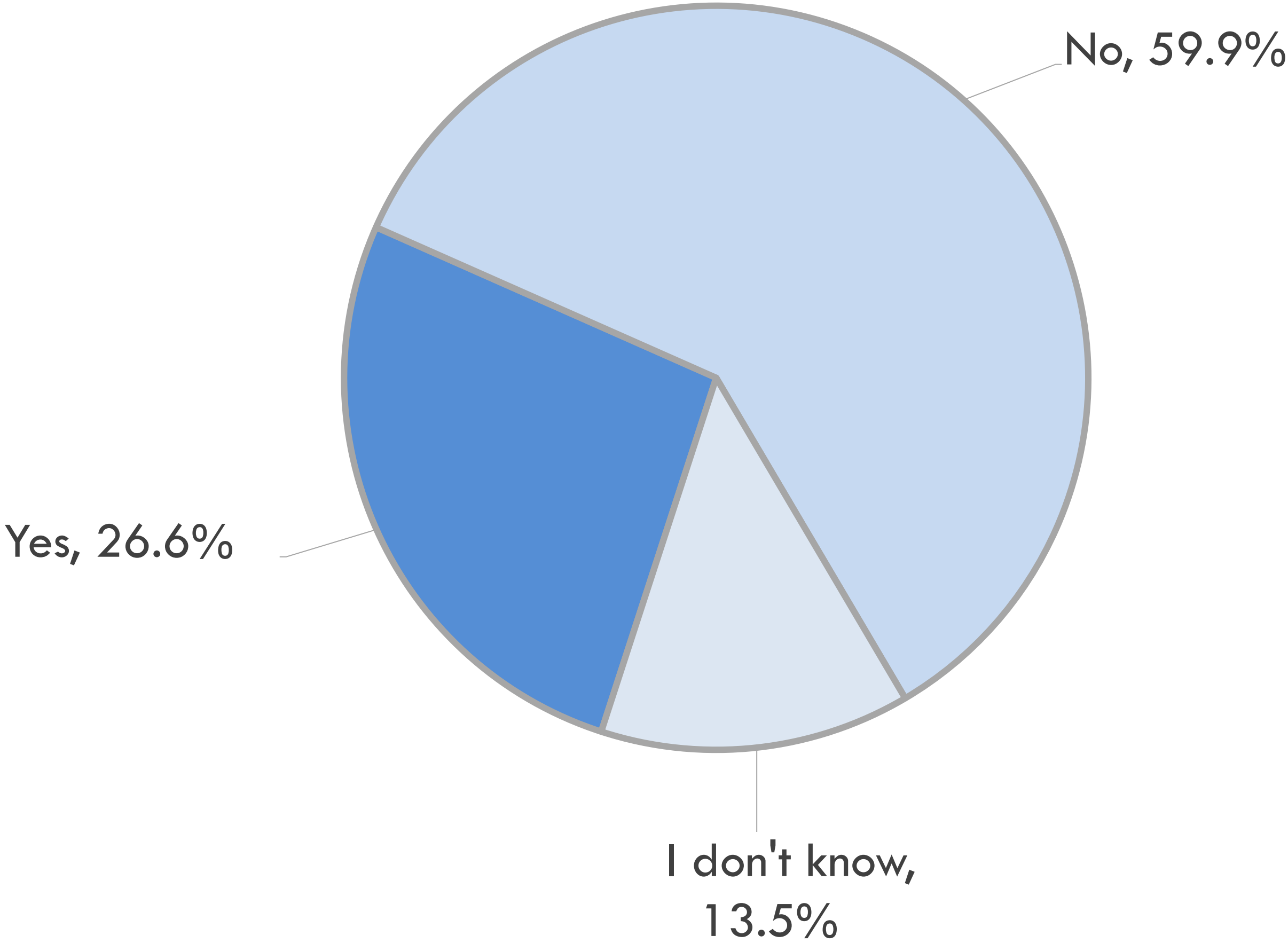
(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



PAST INFLUENCE OF ADS ON DESTINATION SELECTION

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

(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

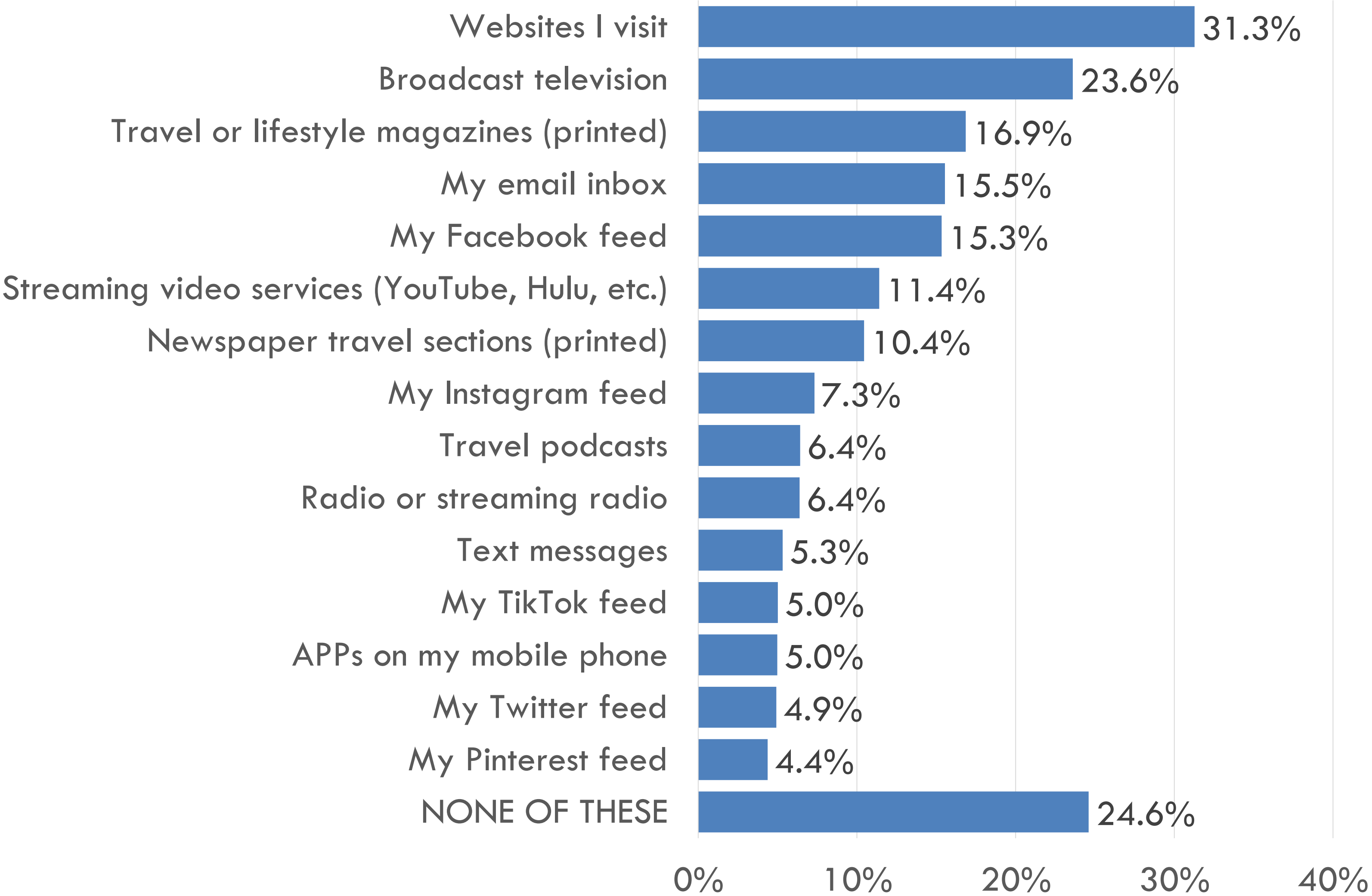


WHERE TRAVELERS WOULD BE RECEPTIVE TO SEEING ADS: TOP 3

Question: Please think about where (if anywhere) you would be open to seeing travel advertisements.

In general, where would you be **MOST RECEPTIVE** to advertisements for travel destinations?

(Select the **THREE PLACES** where you would generally be most receptive)



(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

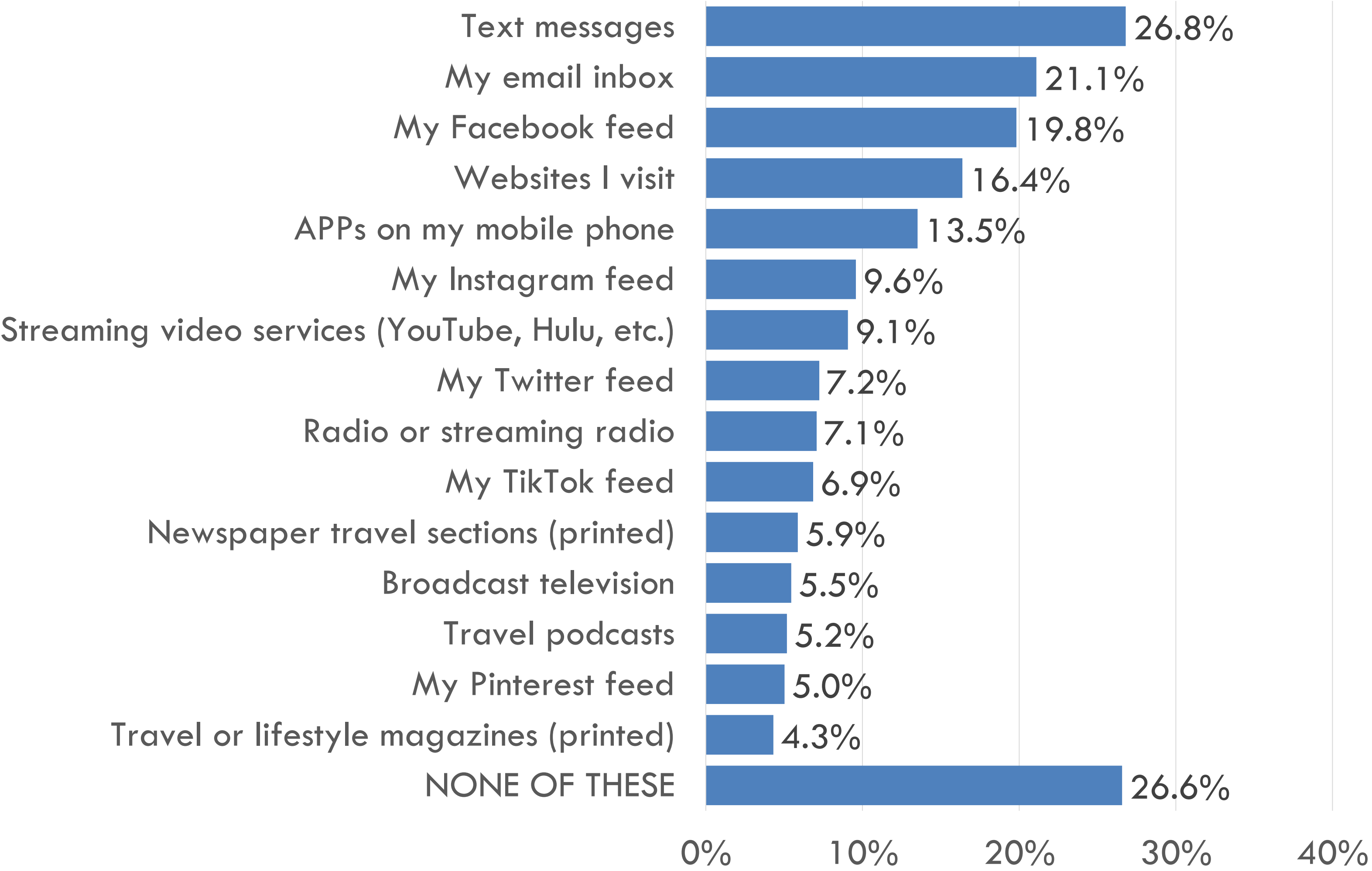
WHERE TRAVELERS WOULD NOT BE RECEPTIVE TO SEEING ADS: TOP 3

Question: Please think about where **YOU WOULD NOT WANT TO SEE** travel advertisements.

In general, where would you be **LEAST RECEPTIVE** to advertisements for travel destinations?

(Select the **THREE PLACES** where you would generally be least receptive)

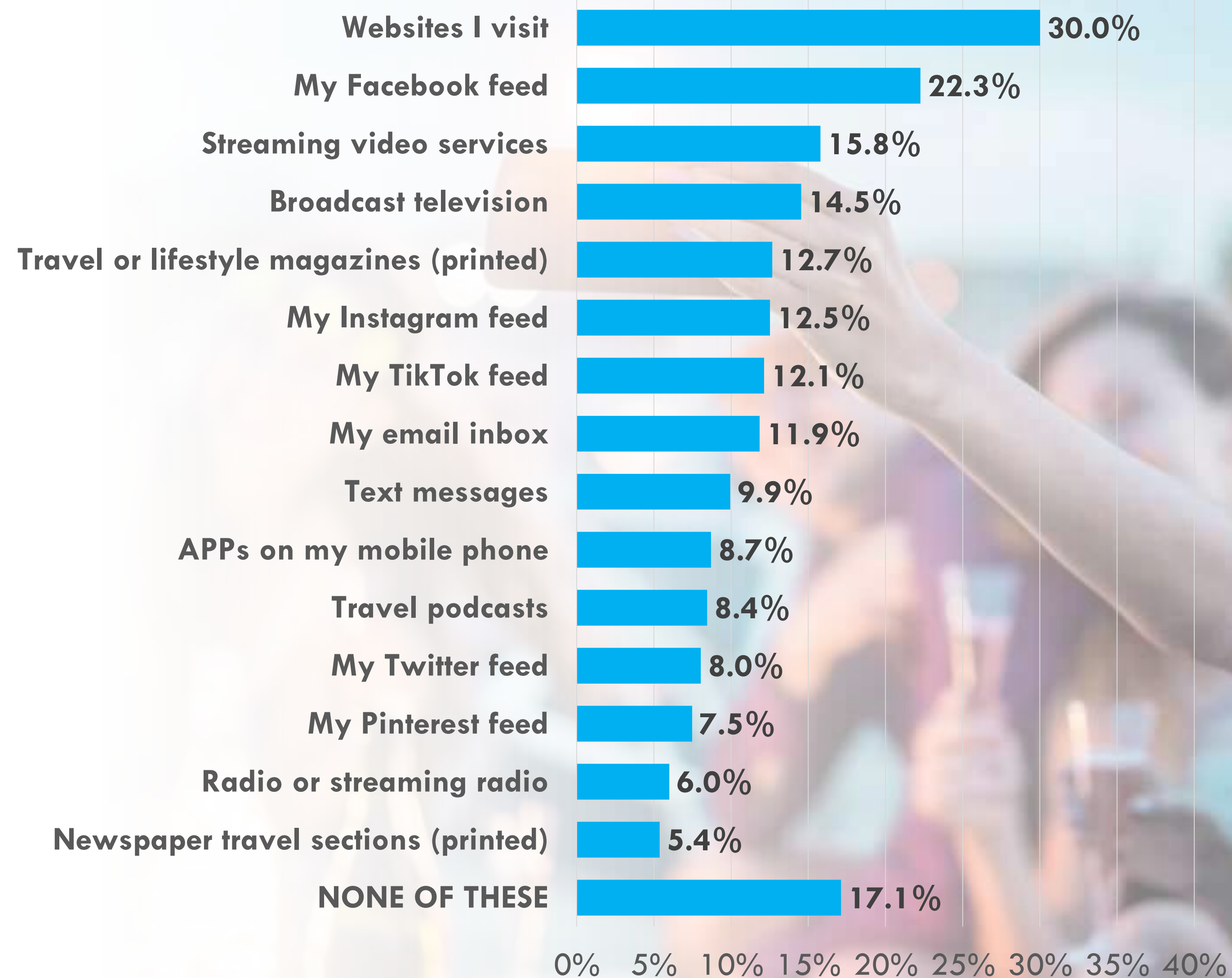
(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



MOST RECEPTIVE MARKETING CHANNELS: MILLENNIALS

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

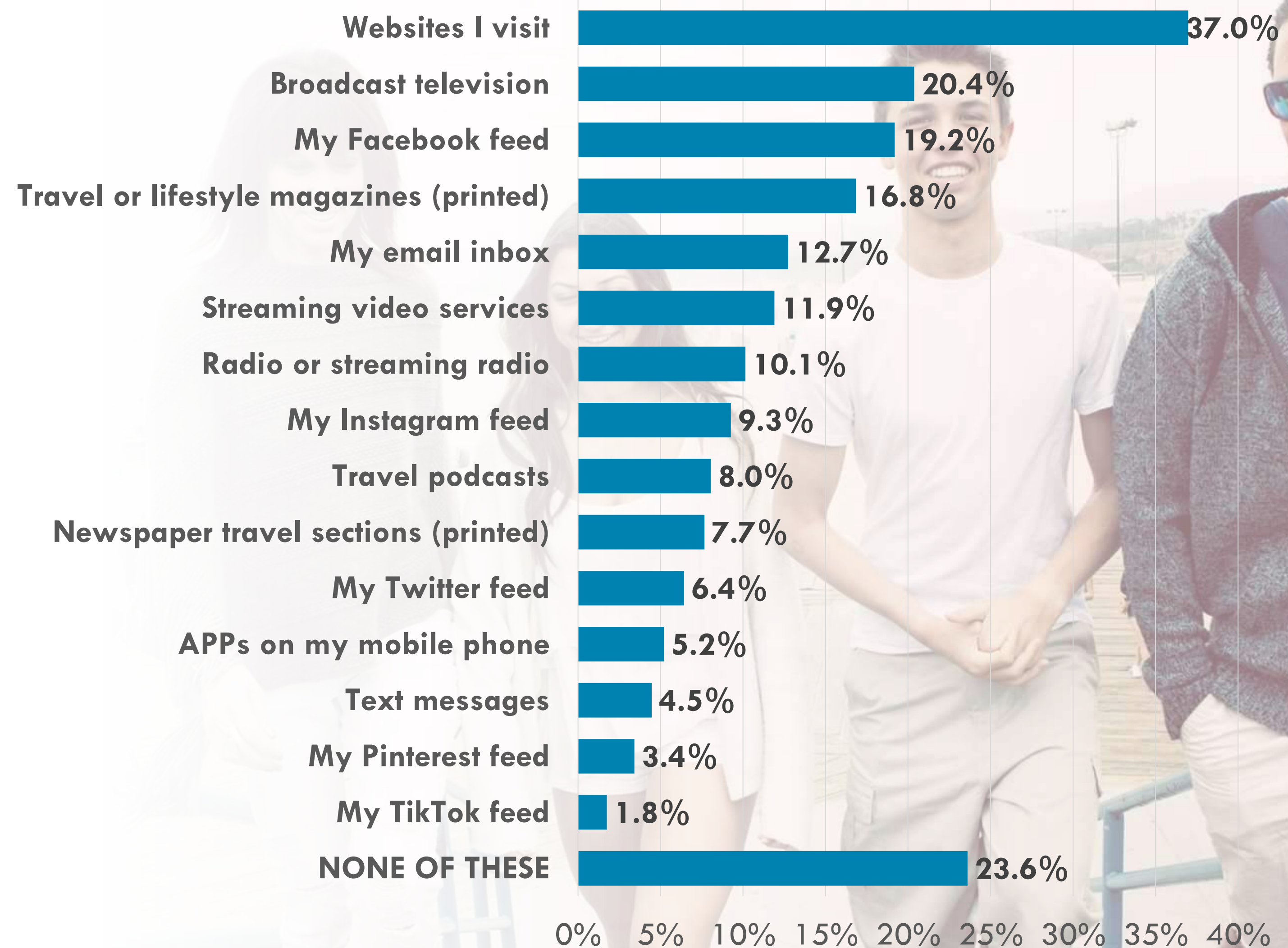
(Base: Waves 49 data. Respondents who recall seeing a destination ad in the last month, 401 completed surveys. Data collected February 12-14, 2021)



MOST RECEPTIVE MARKETING CHANNELS: GEN X

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

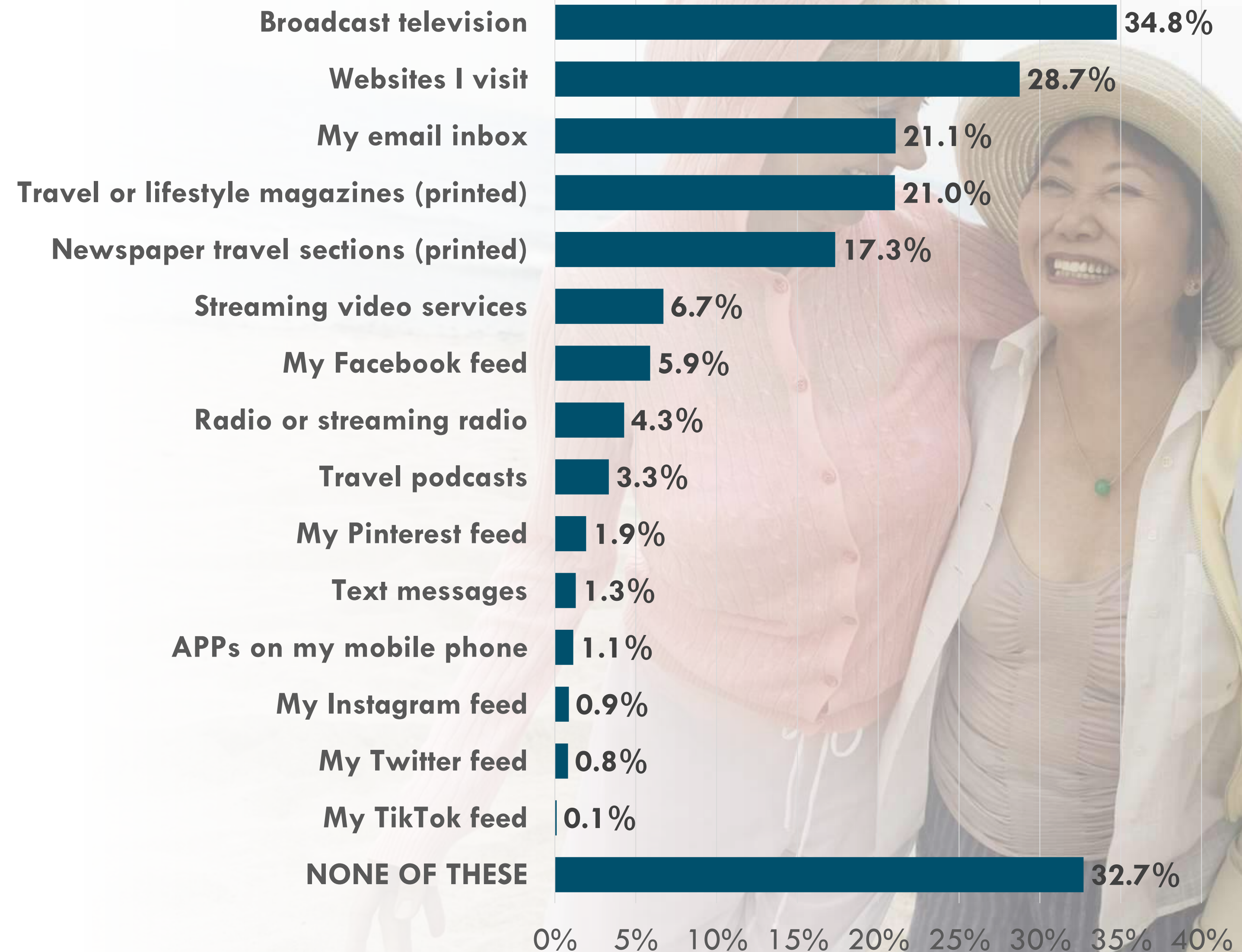
(Base: Waves 49 data. Respondents who recall seeing a destination ad in the last month, 401 completed surveys. Data collected February 12-14, 2021)



MOST RECEPTIVE MARKETING CHANNELS: BABY BOOMERS

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

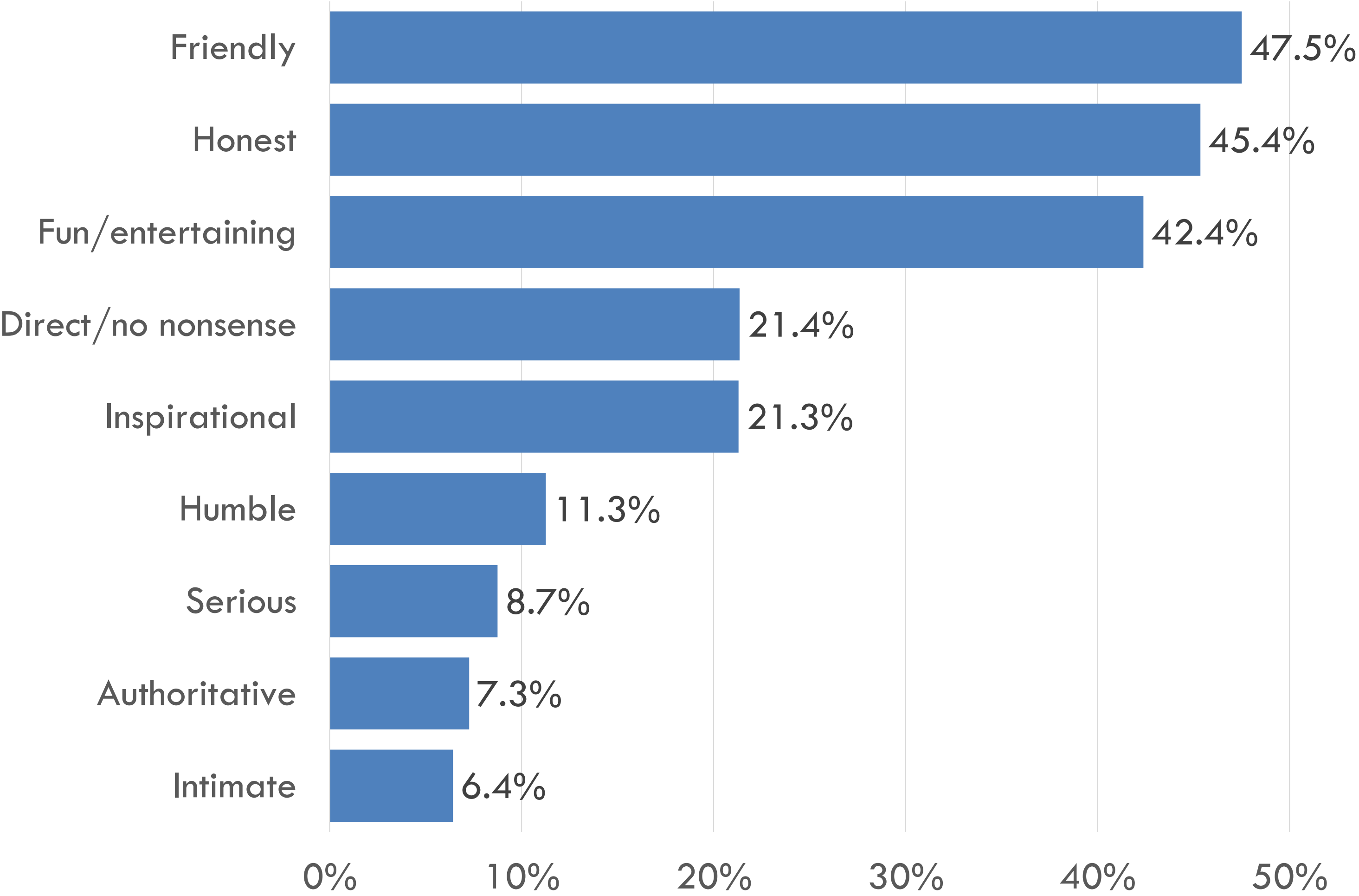
(Base: Waves 49 data. Respondents who recall seeing a destination ad in the last month, 401 completed surveys. Data collected February 12-14, 2021)



DESIRED ADVERTISING TONES

Question: Think about advertisements for travel destinations. How you would like travel destinations to speak to you in their advertisements? Which of these tones would you find generally most appealing right now? (Select at most 3)

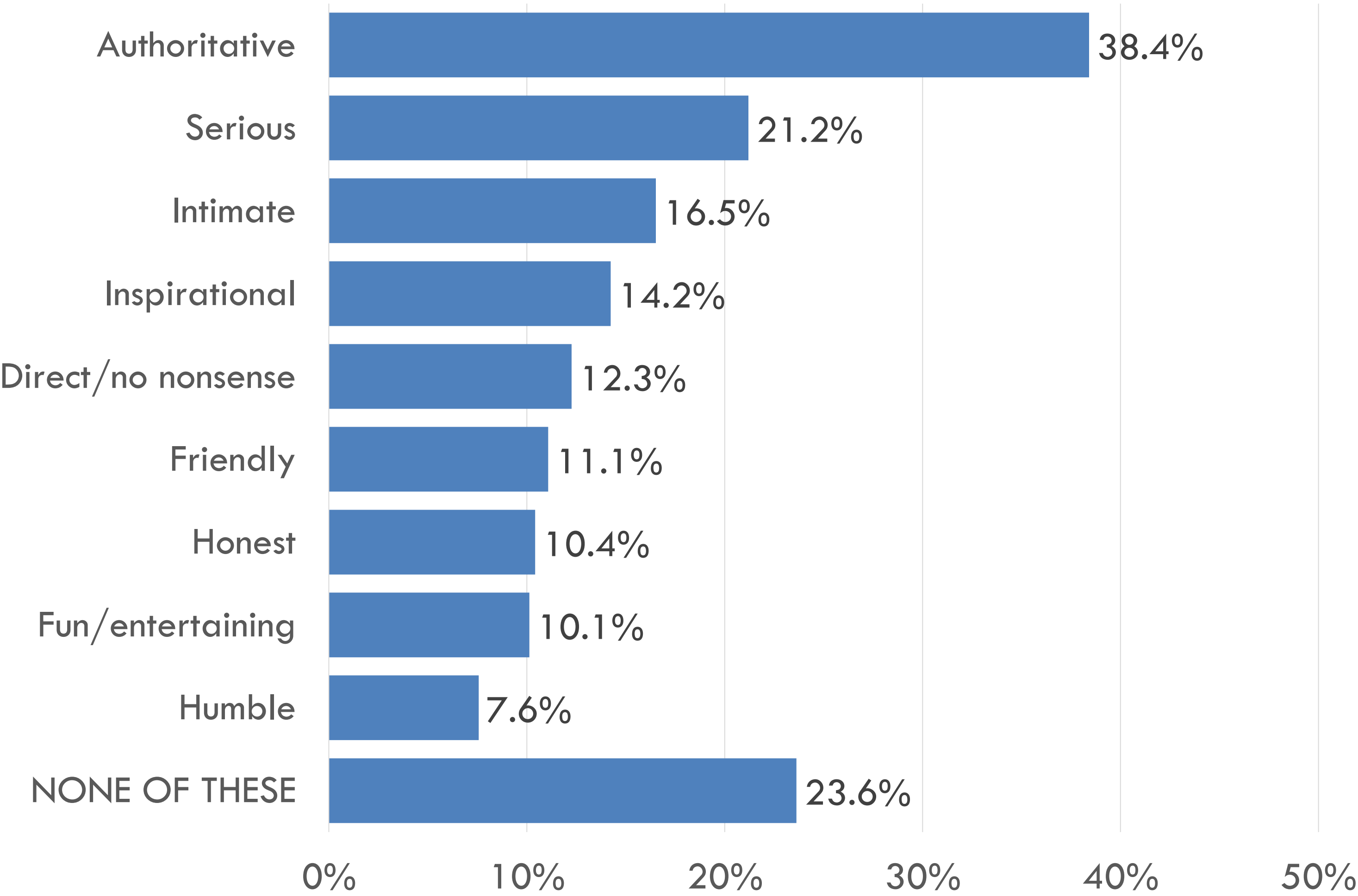
(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



UNWANTED ADVERTISING TONES

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

(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

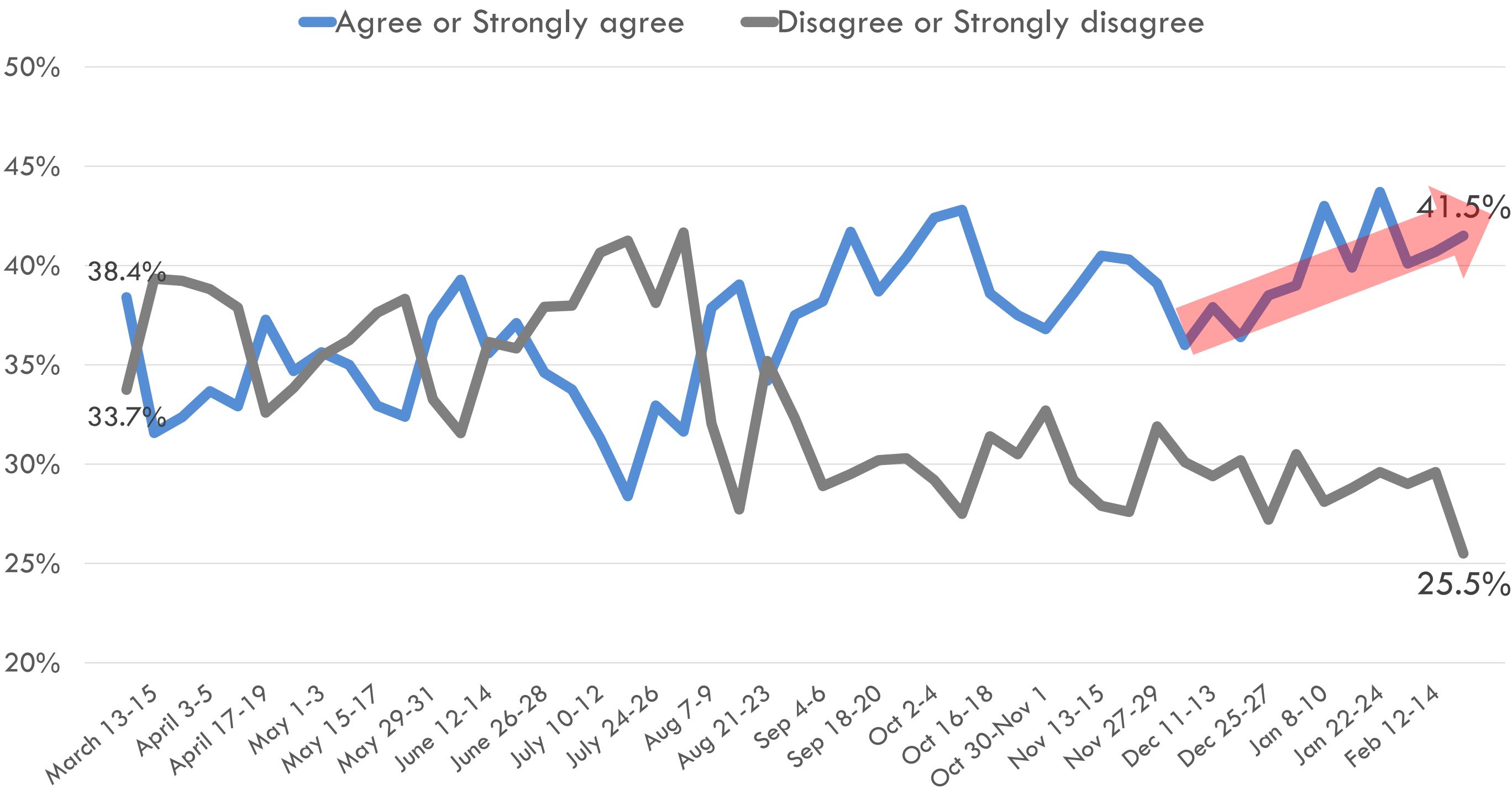
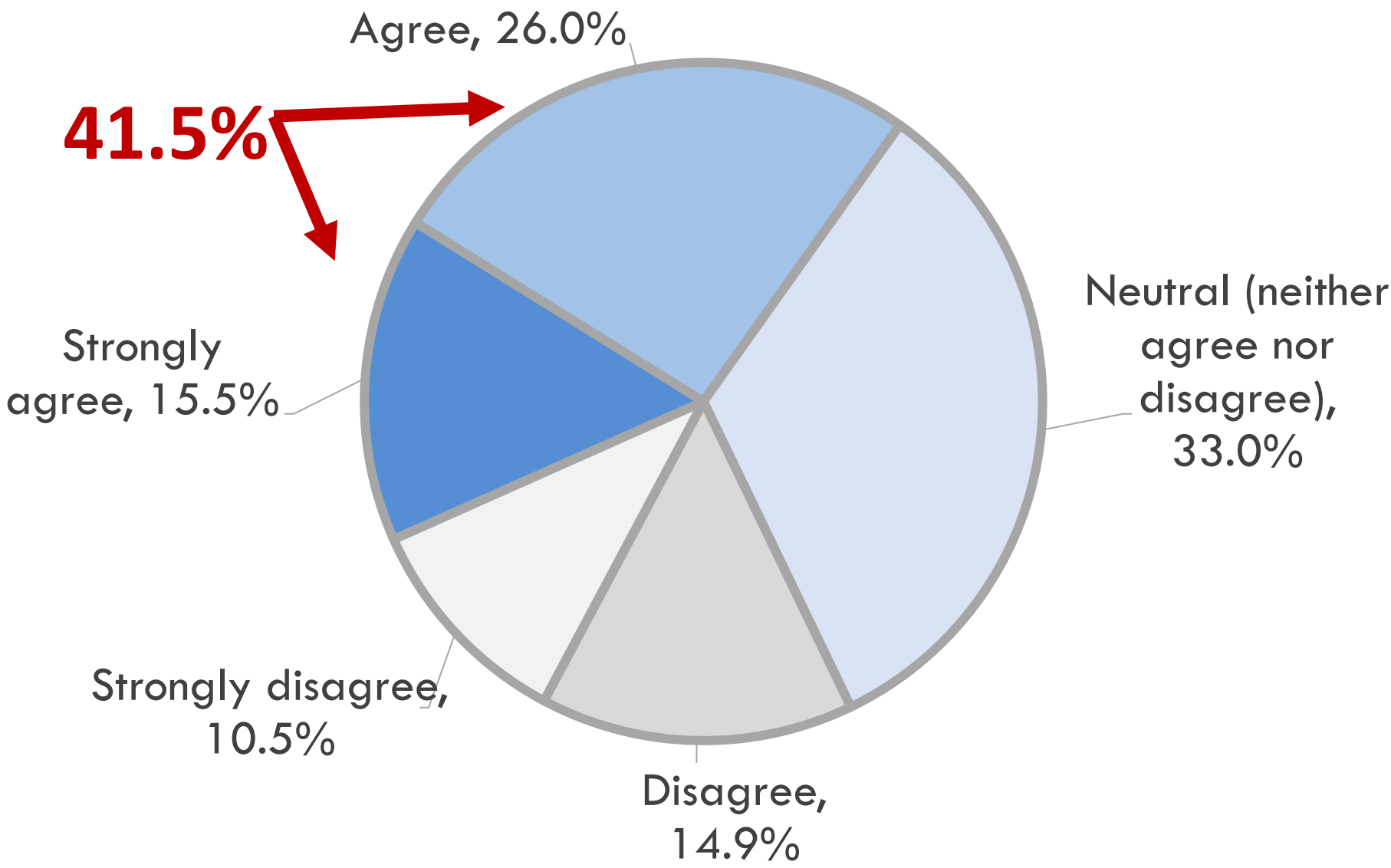


DISCOUNTS AND PRICE CUTS

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.

Historical data

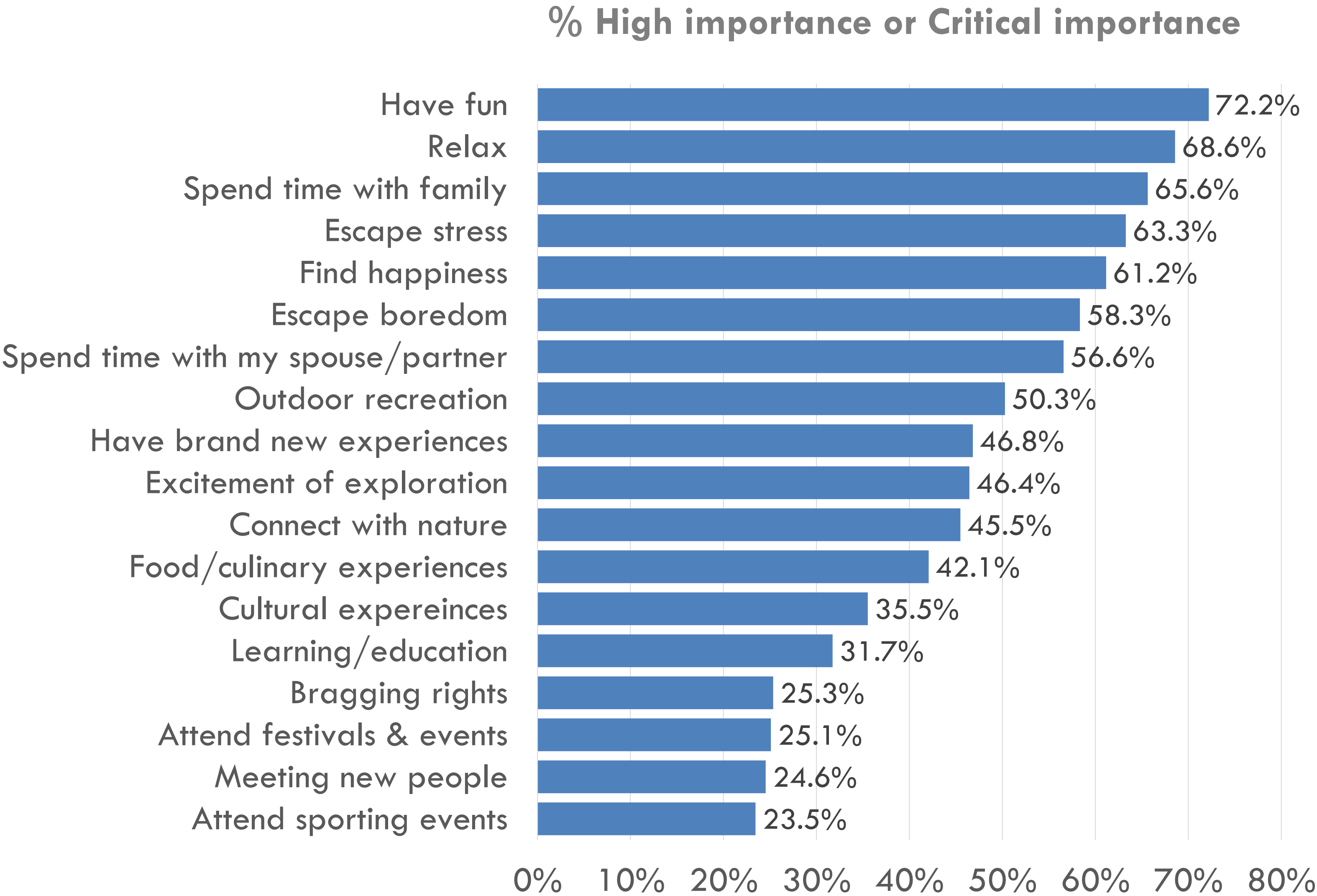


DESIRED TRAVEL EXPERIENCES (NEXT LEISURE TRIP)

Question: Tell us about the **EXPERIENCES** you want to have on **YOUR NEXT LEISURE TRIP**.

However you personally define each, use the scale provided to indicate how important it is that you have each.

(Base: Waves 49 data. Respondents planning to travel in the next 3 months, 576 completed surveys. Data collected February 12-14, 2021)





Our predictive indexes are seeing improvement, suggesting a more fertile environment for advertising may soon arrive.

What is a Predictive Index?



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



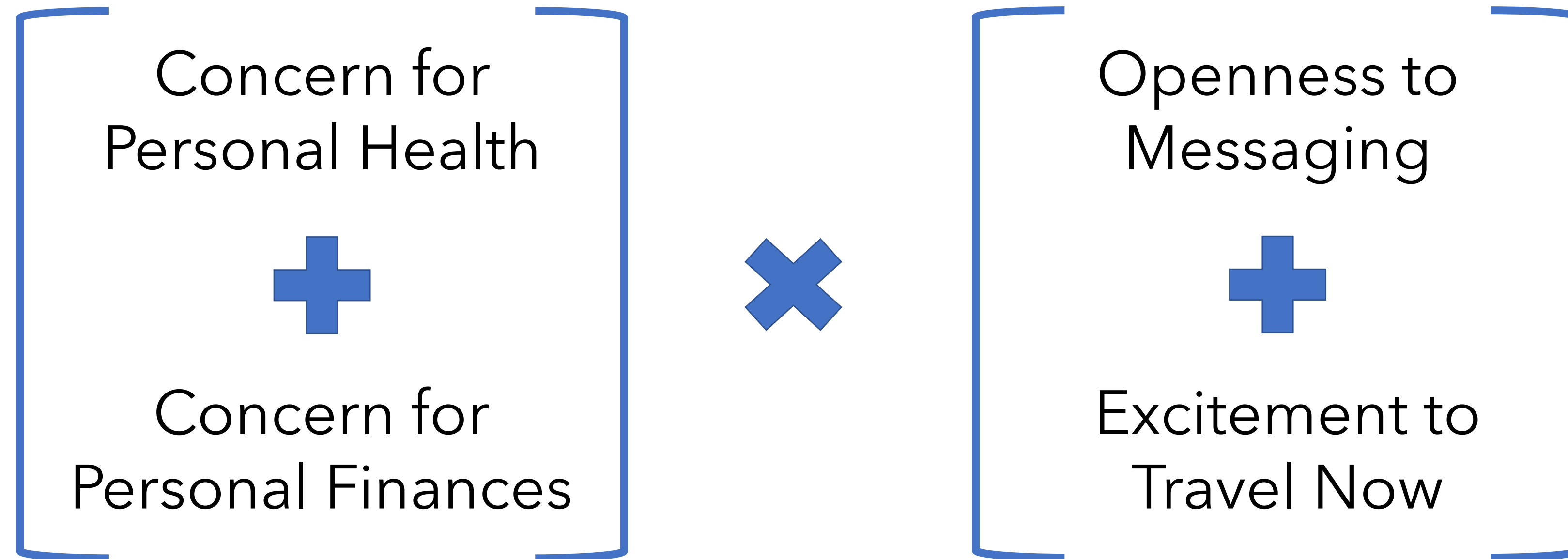
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

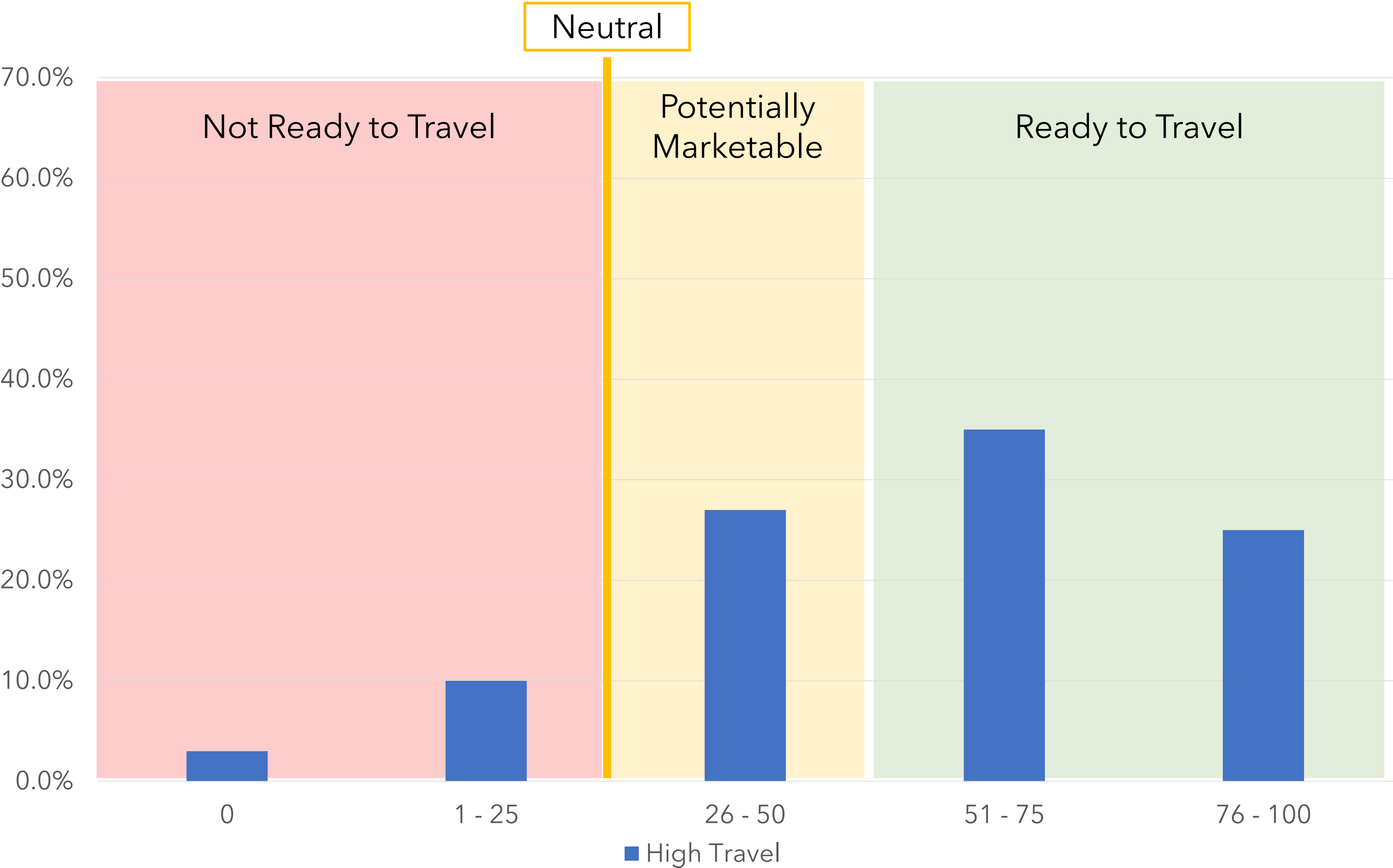
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

Predictive Index Formula



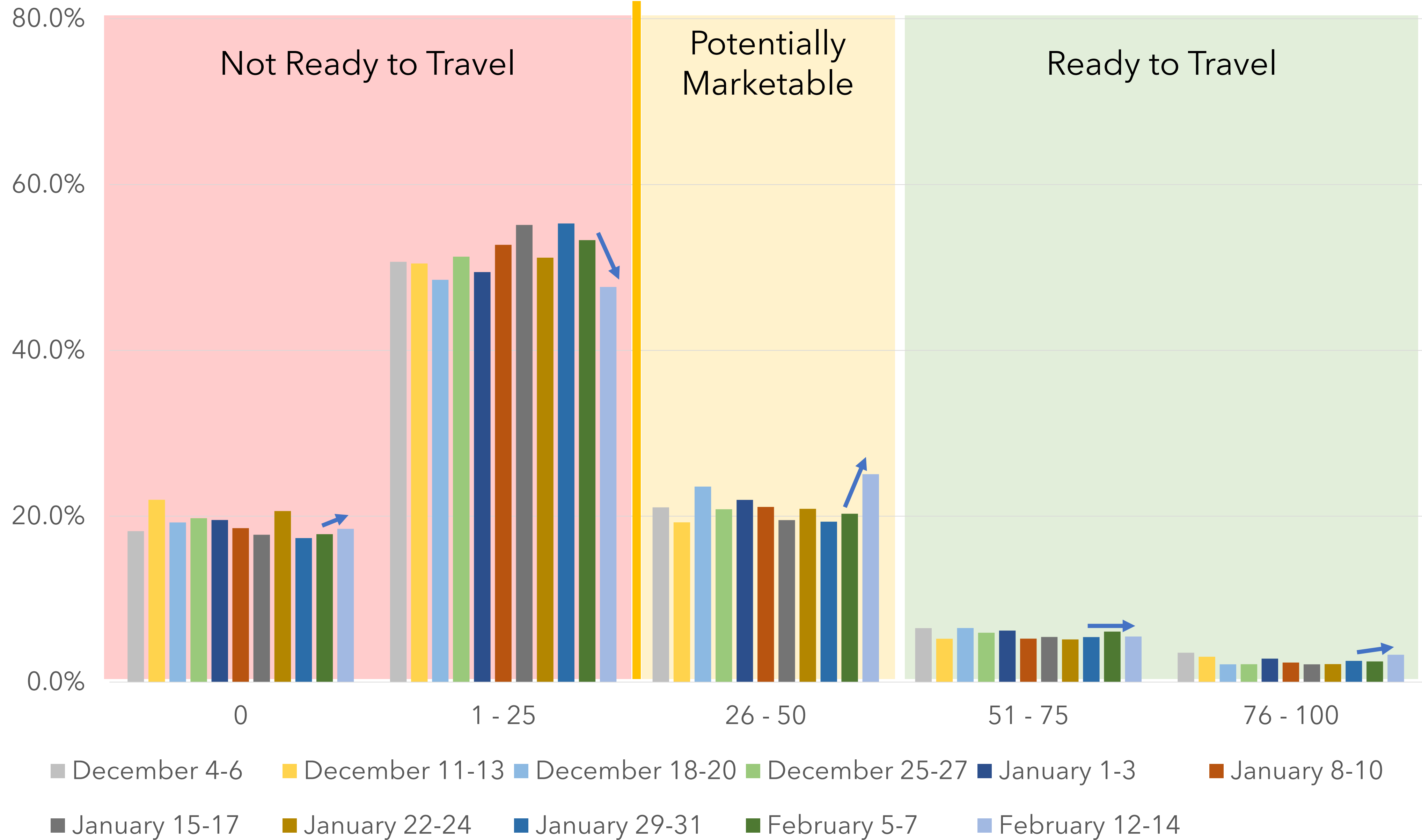
*Normalized to a 100pt scale

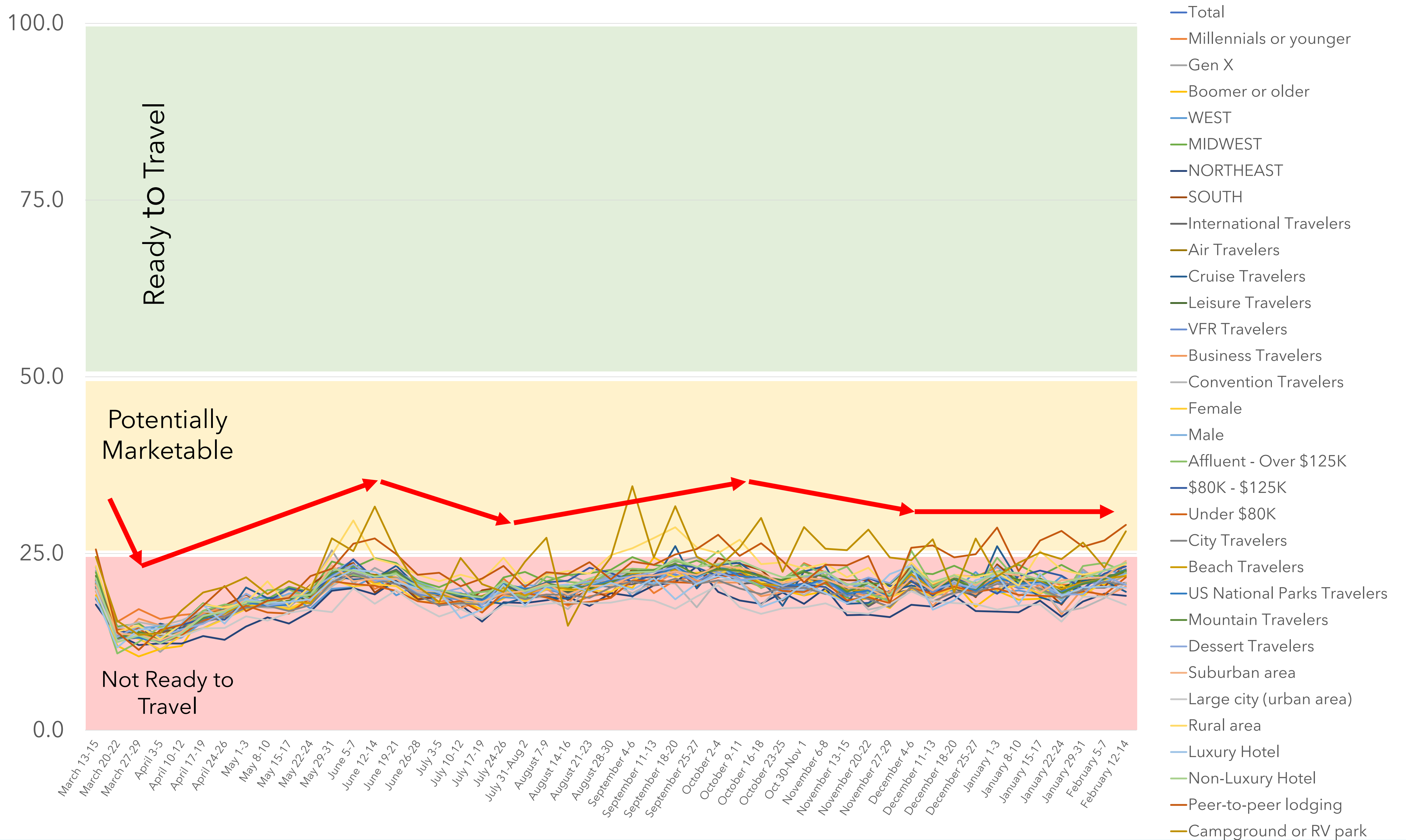
Healthy Travel Outlook

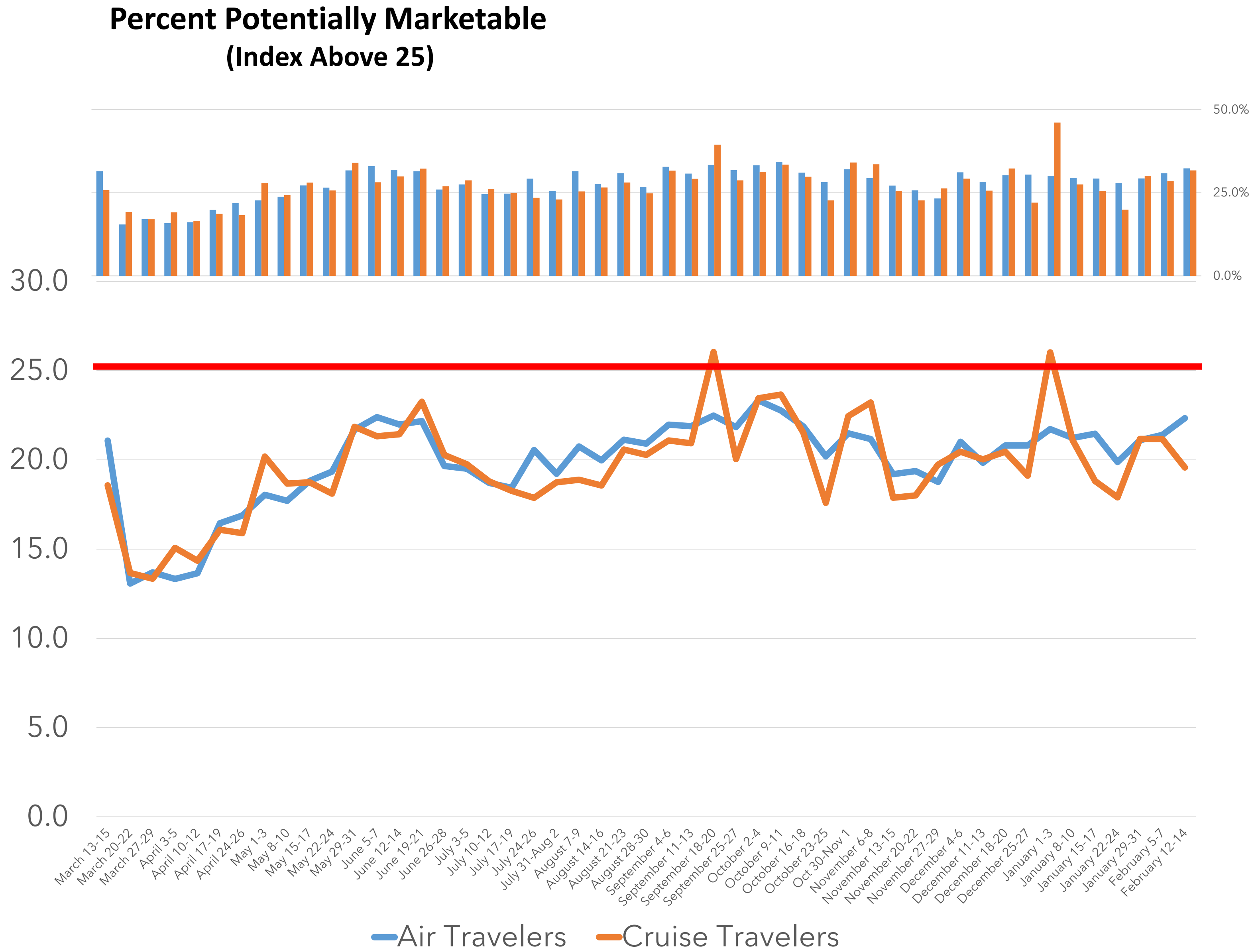
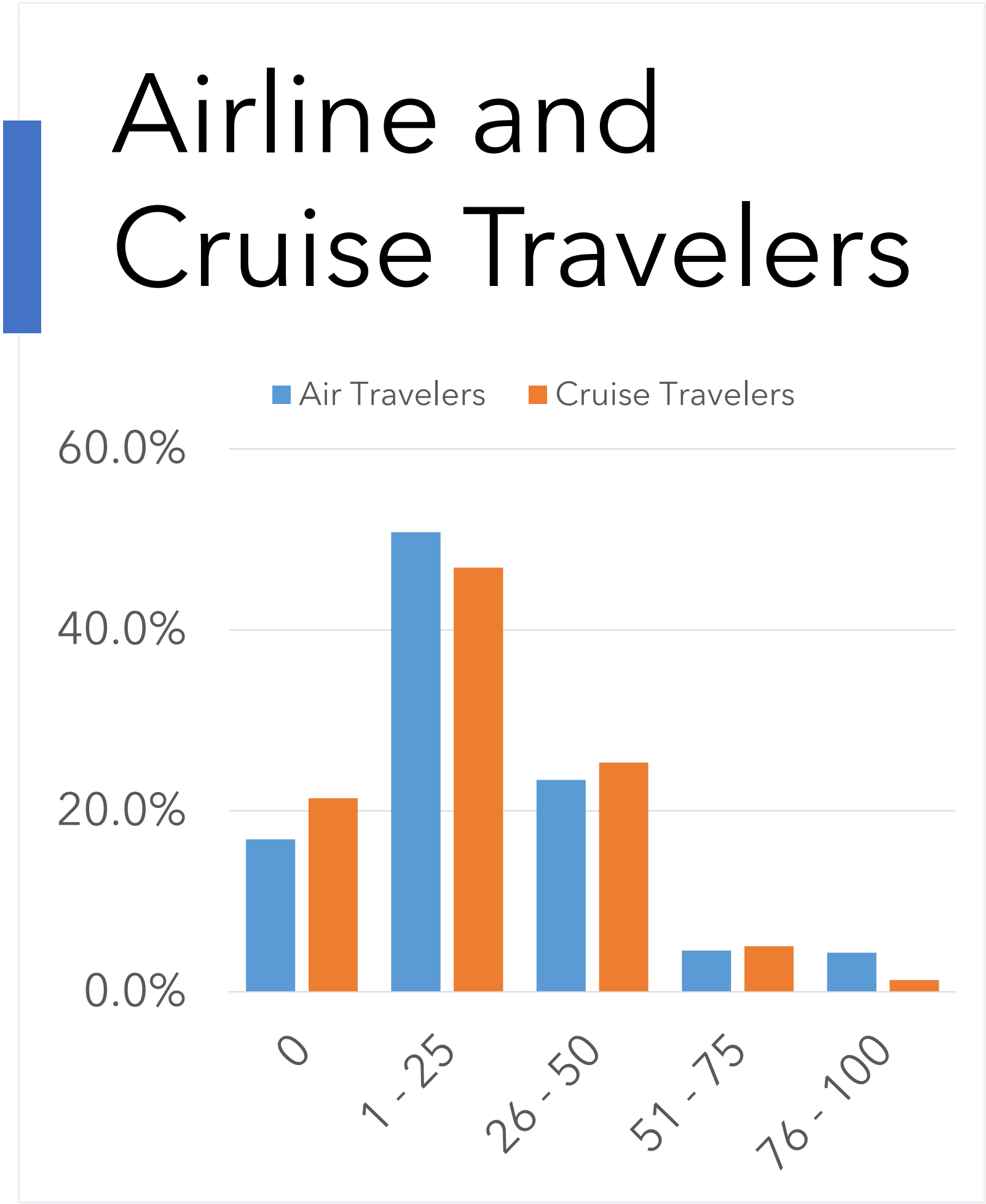


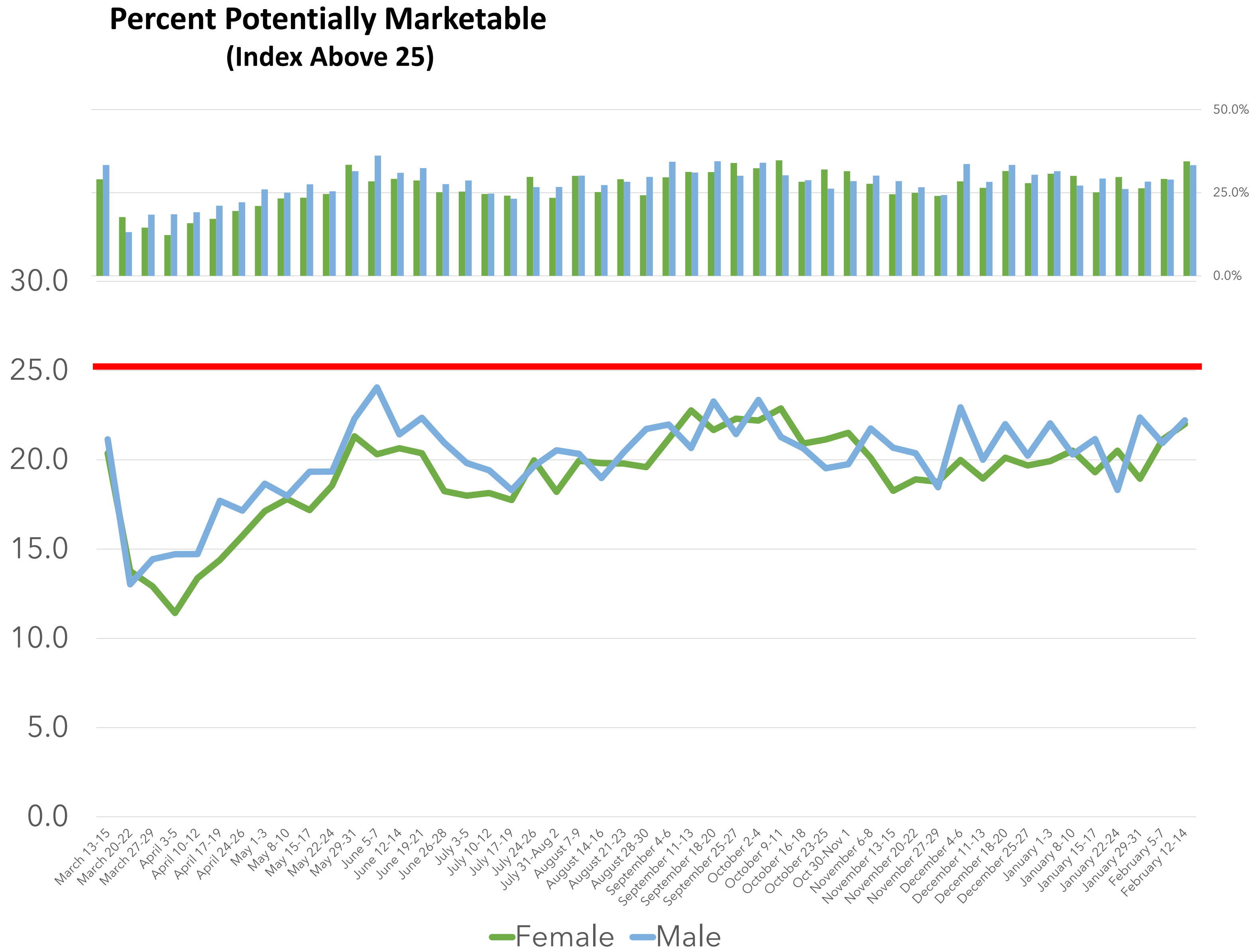
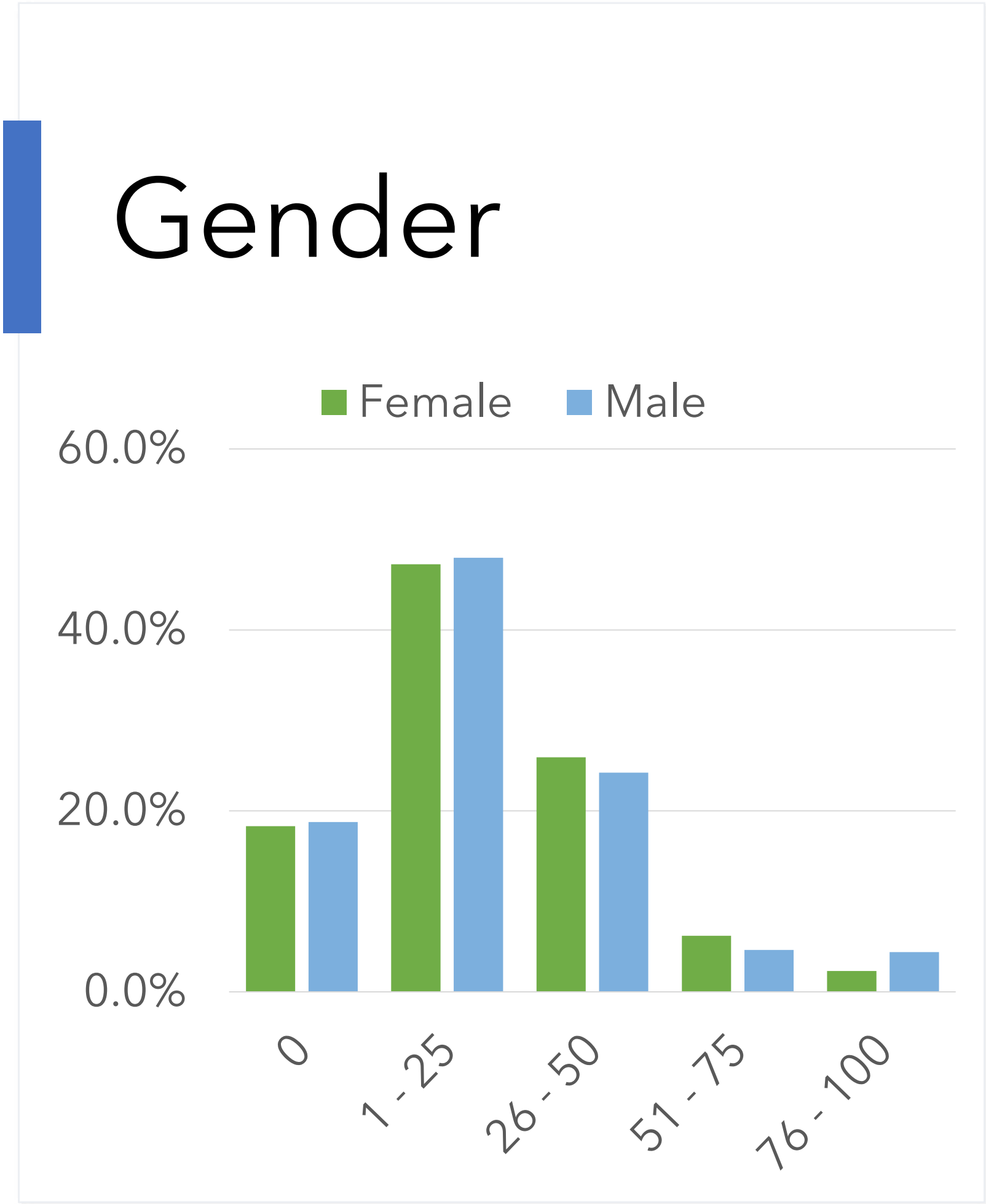
Travel Outlook

Neutral



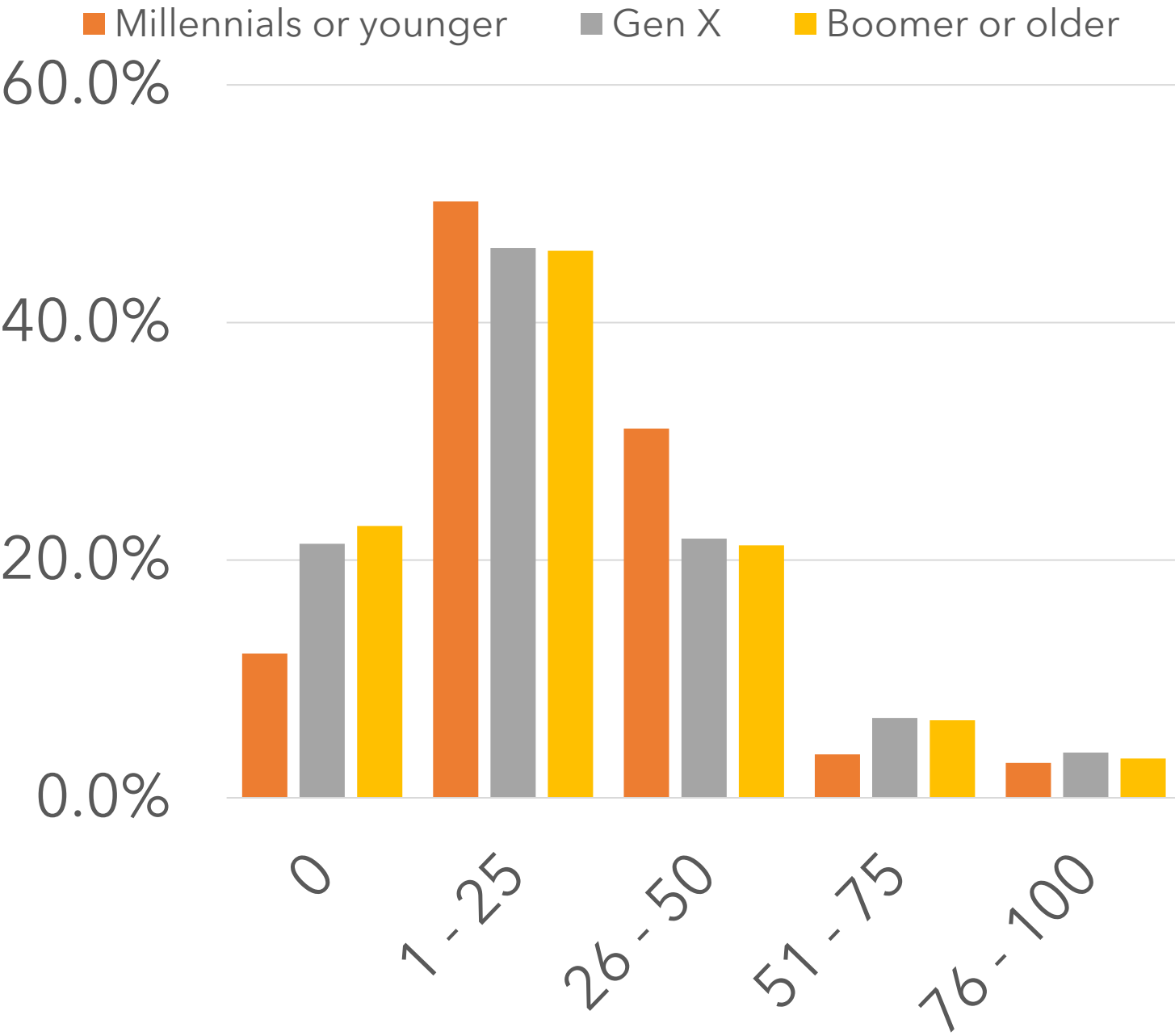




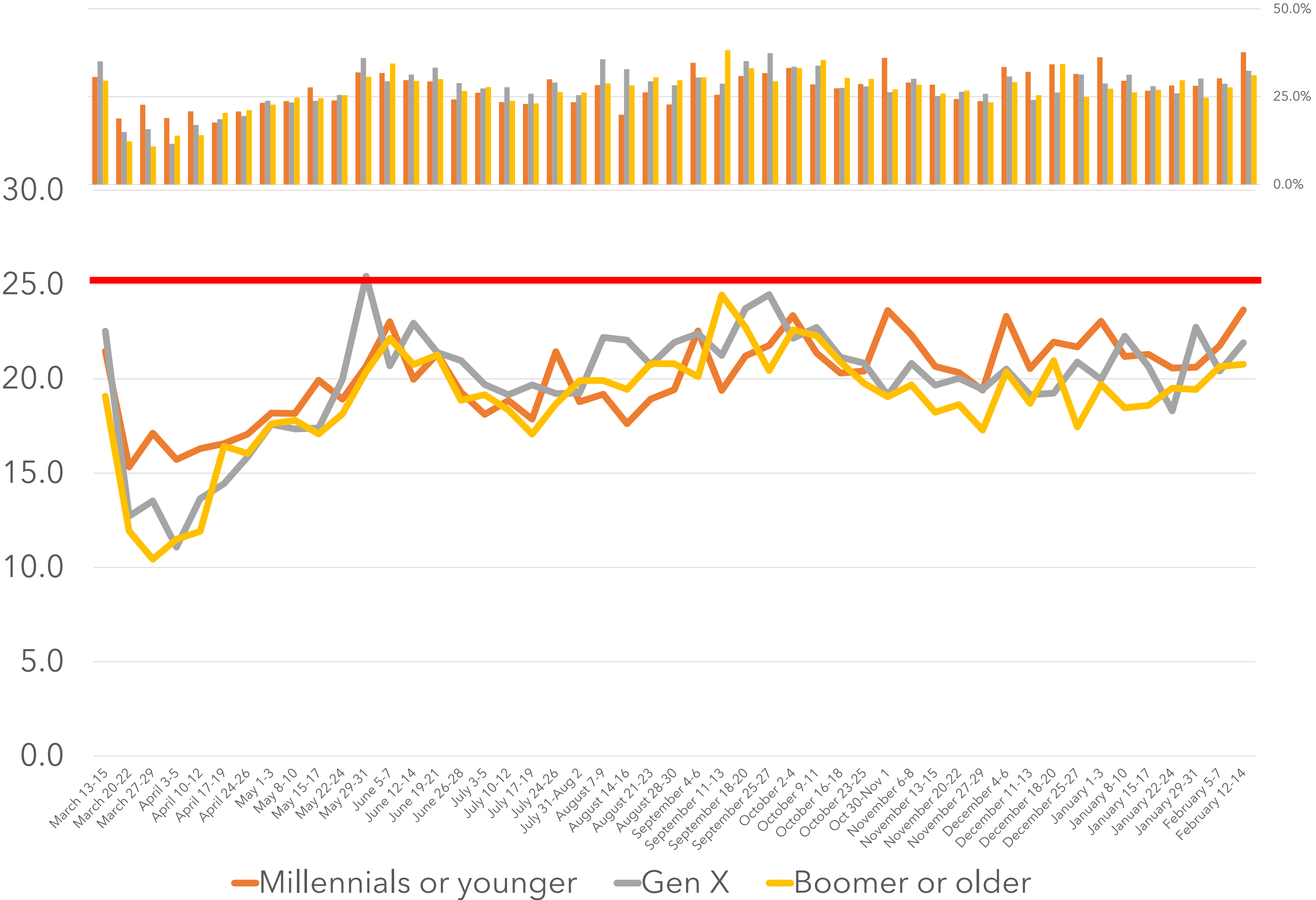


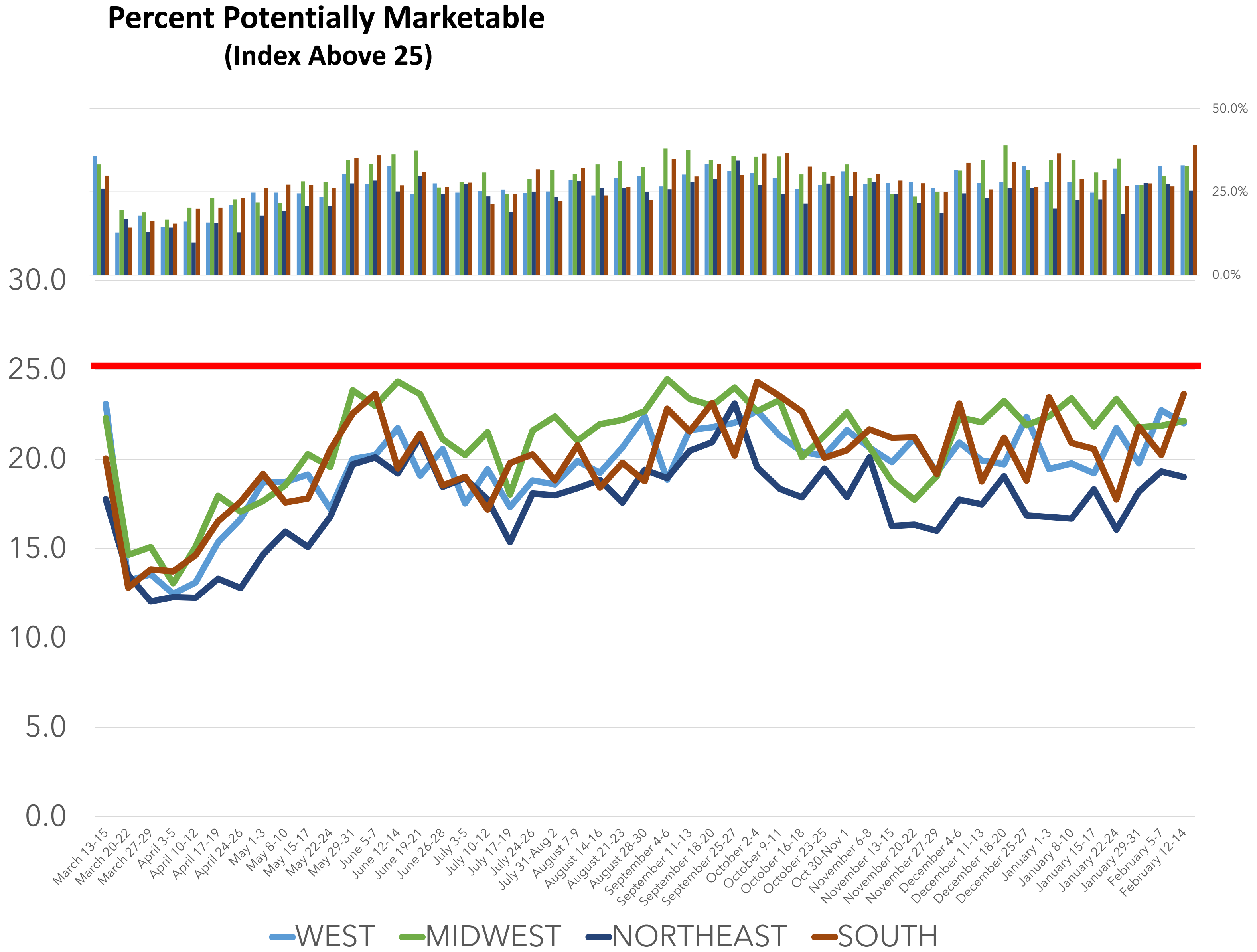
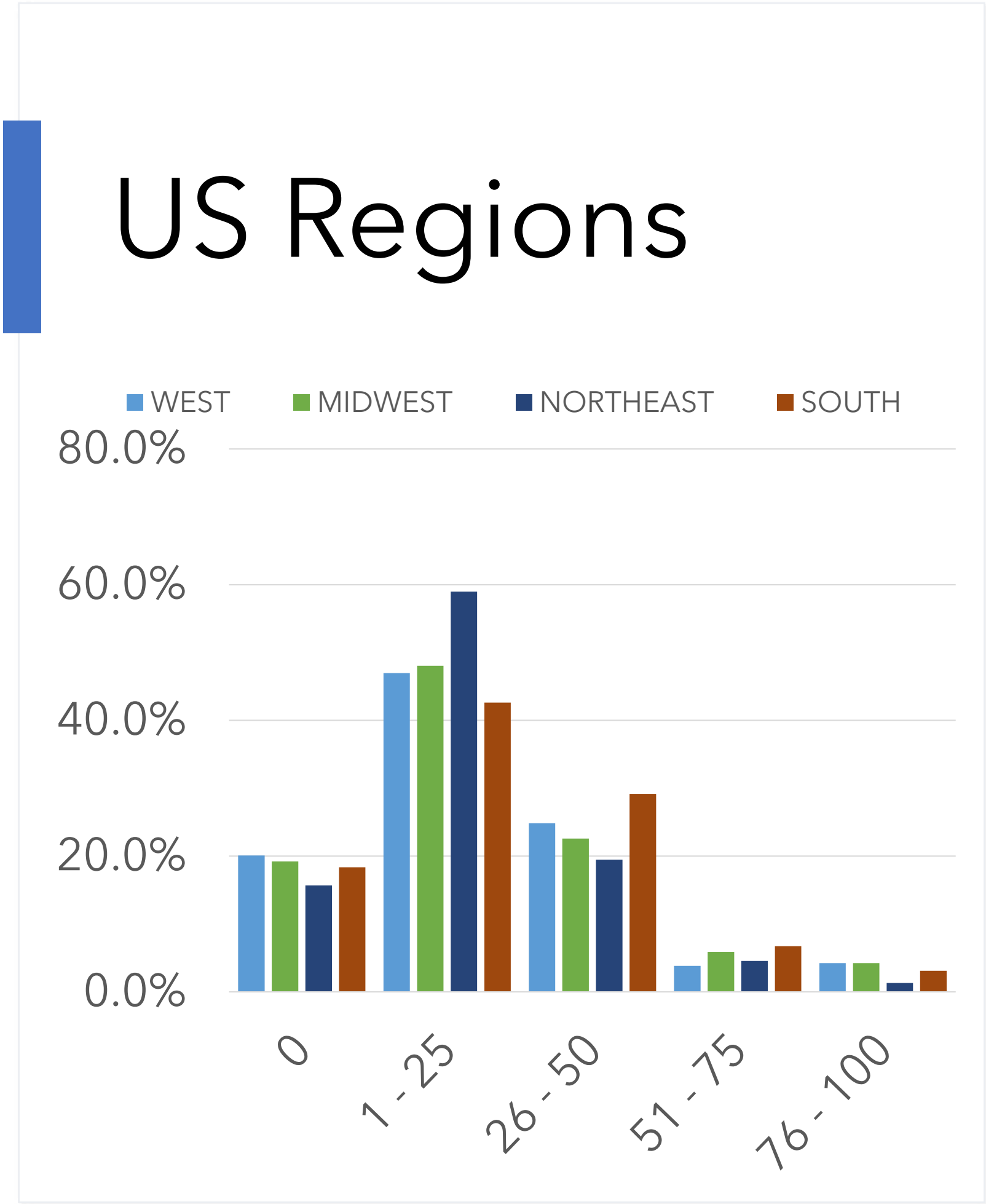


Generation



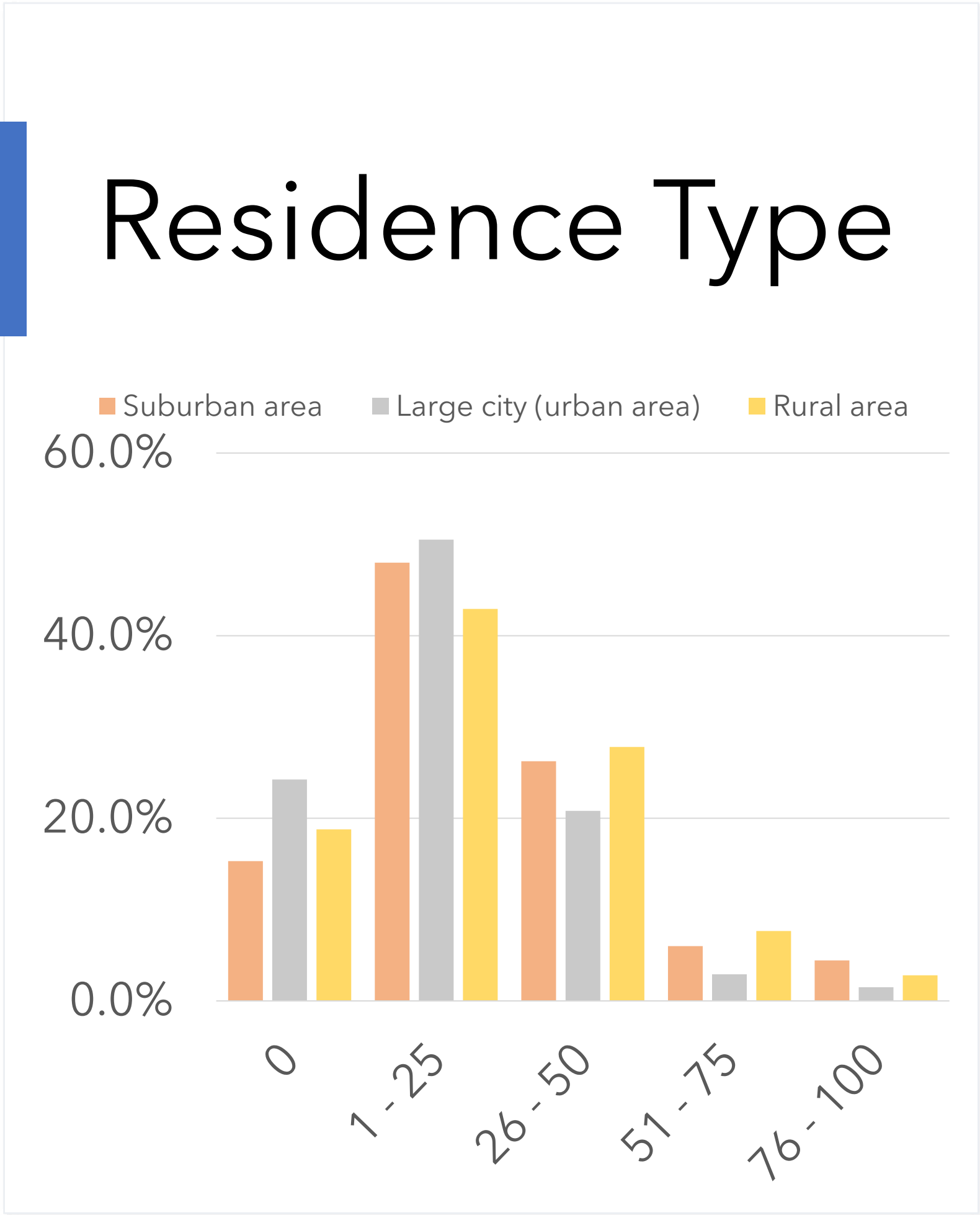
Percent Potentially Marketable (Index Above 25)



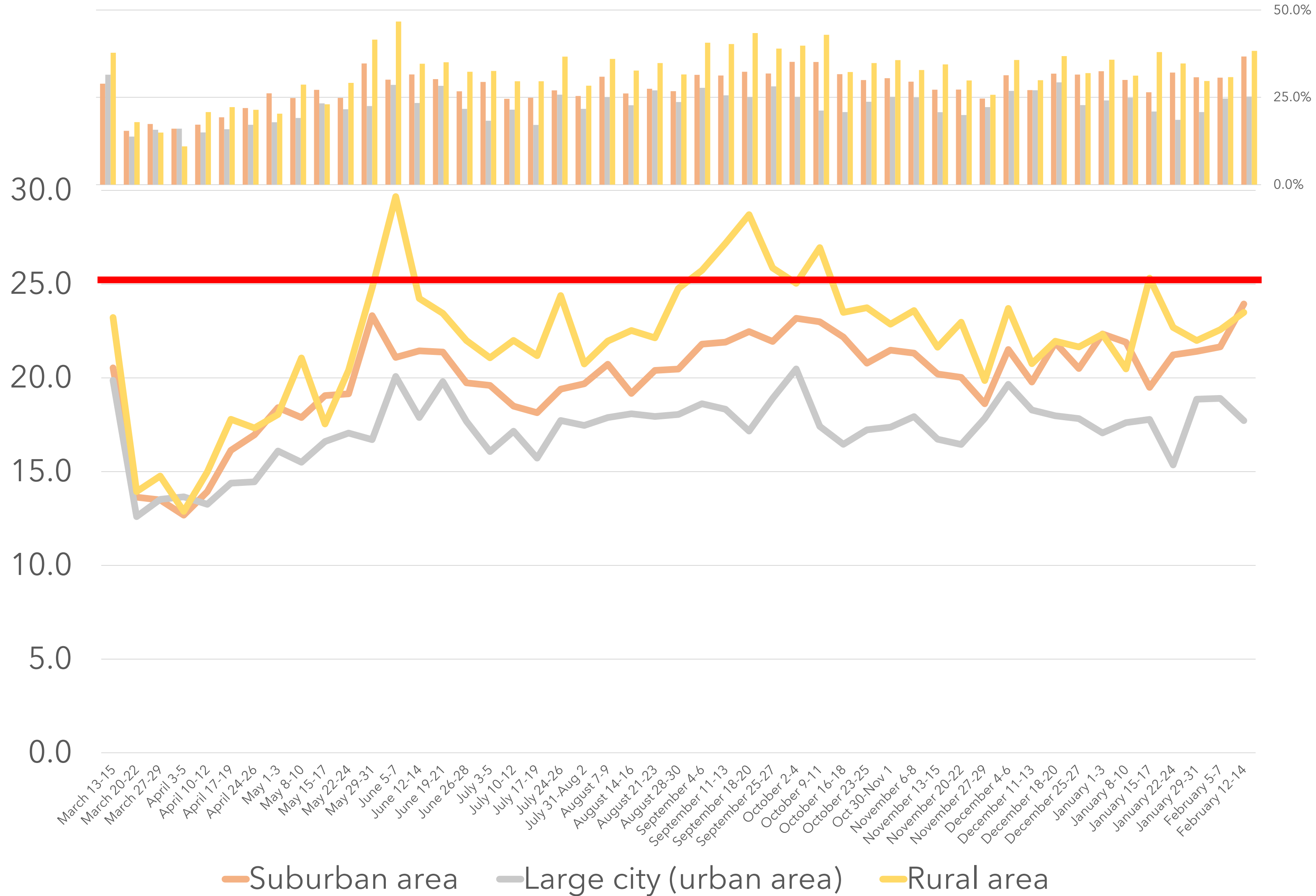


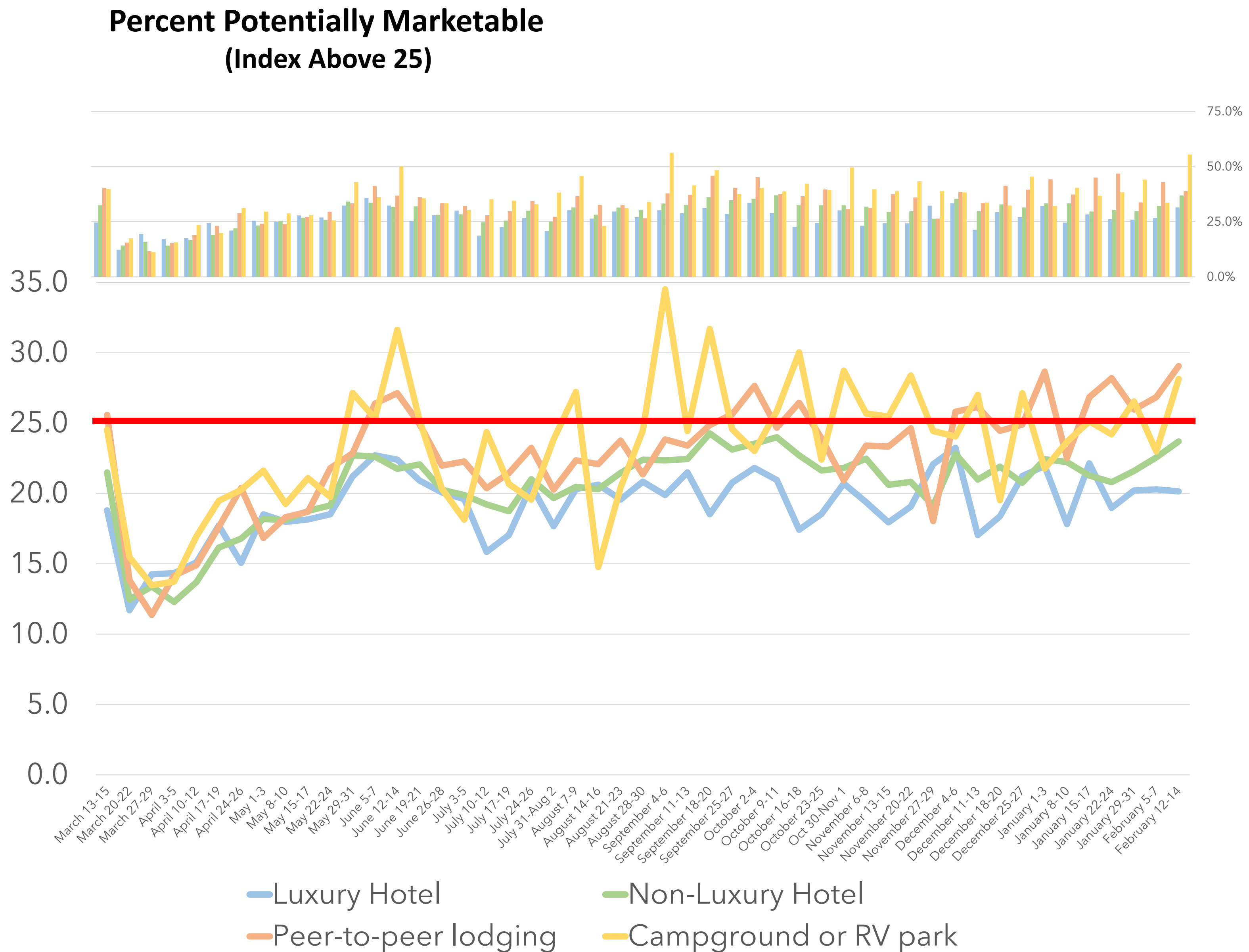
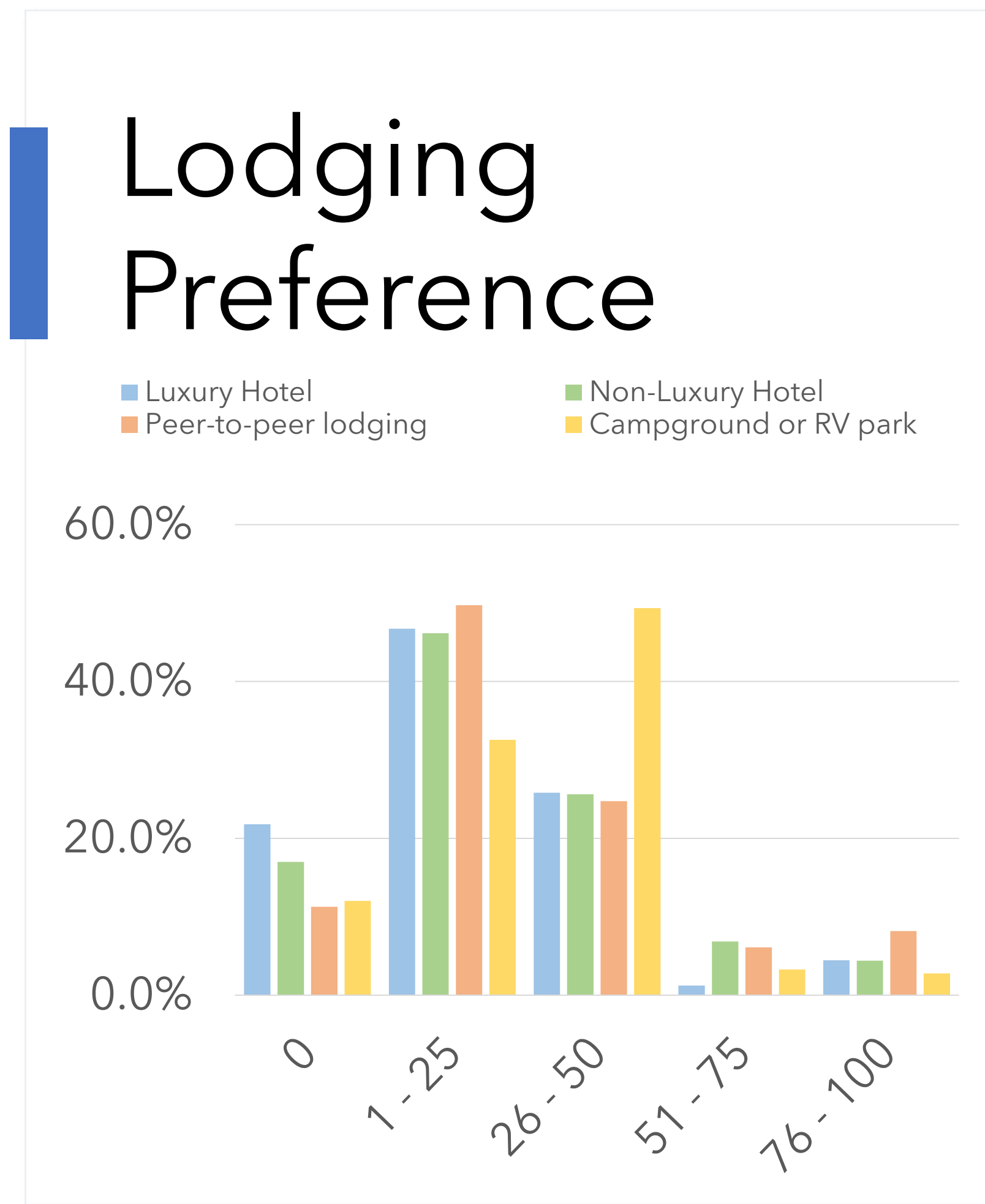


Residence Type



Percent Potentially Marketable (Index Above 25)



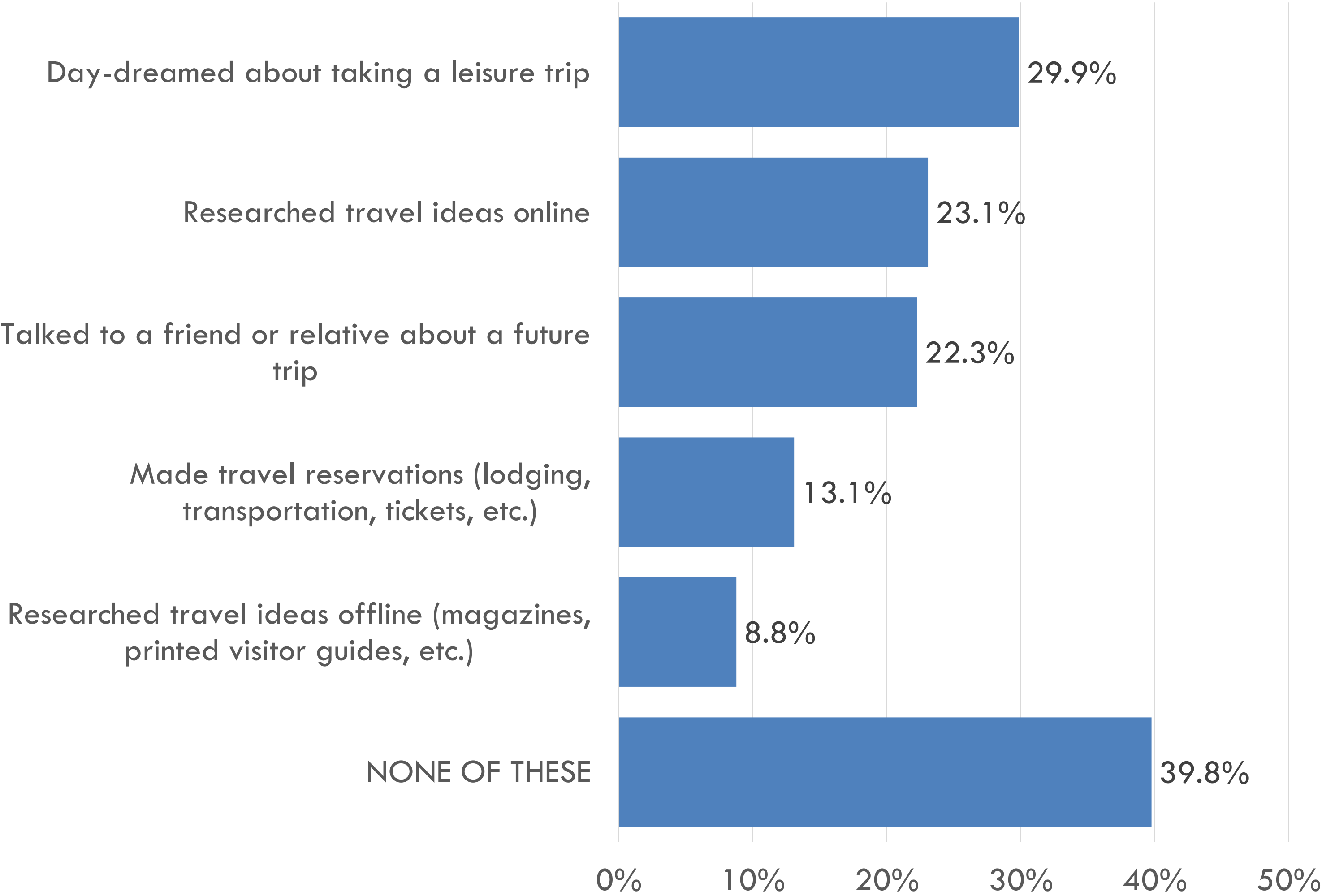


TRAVEL DREAMING & PLANNING IN THE PAST WEEK

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 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

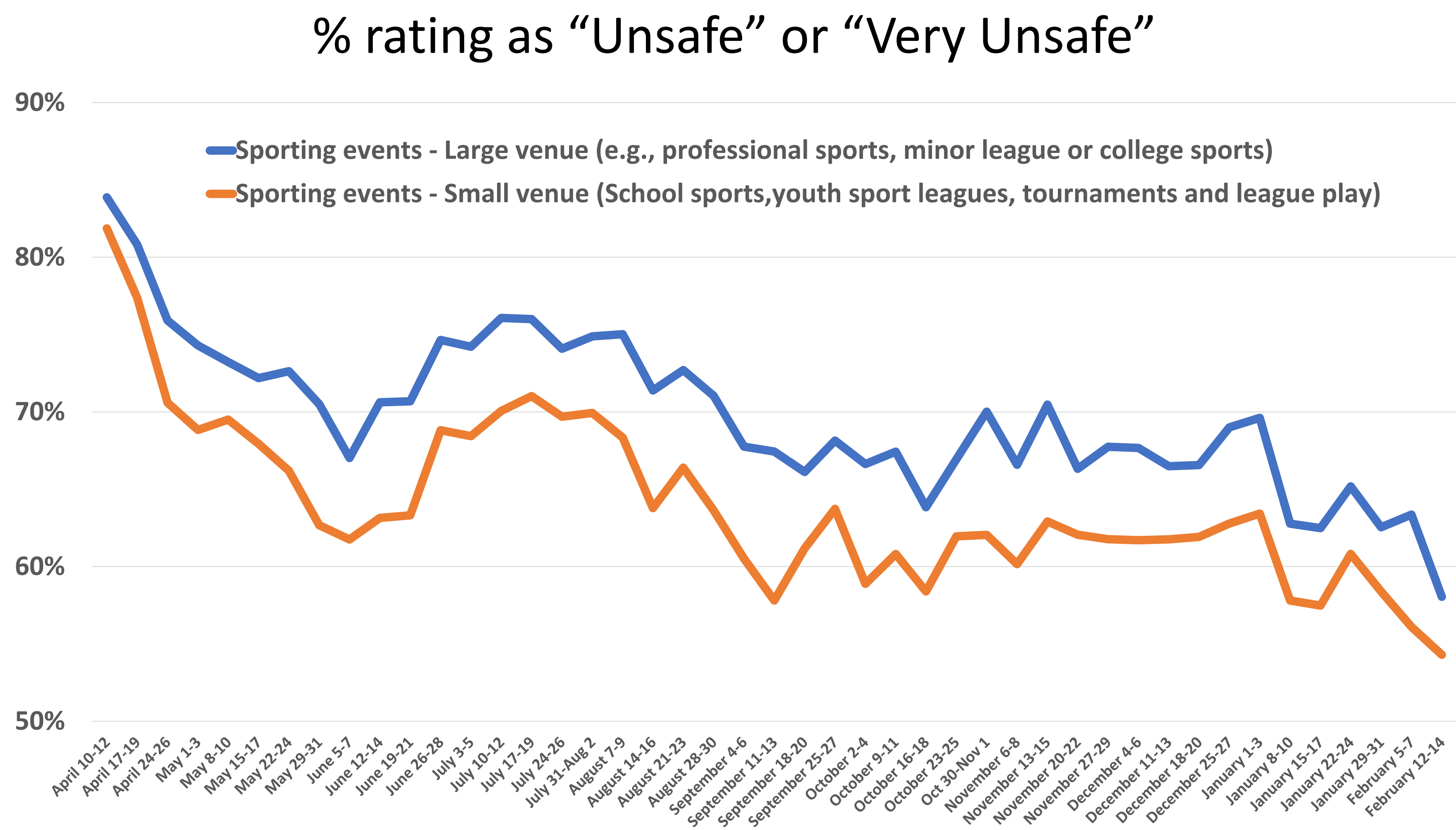




It appears that even in a pandemic major sporting events can move the needle. If not now, later.

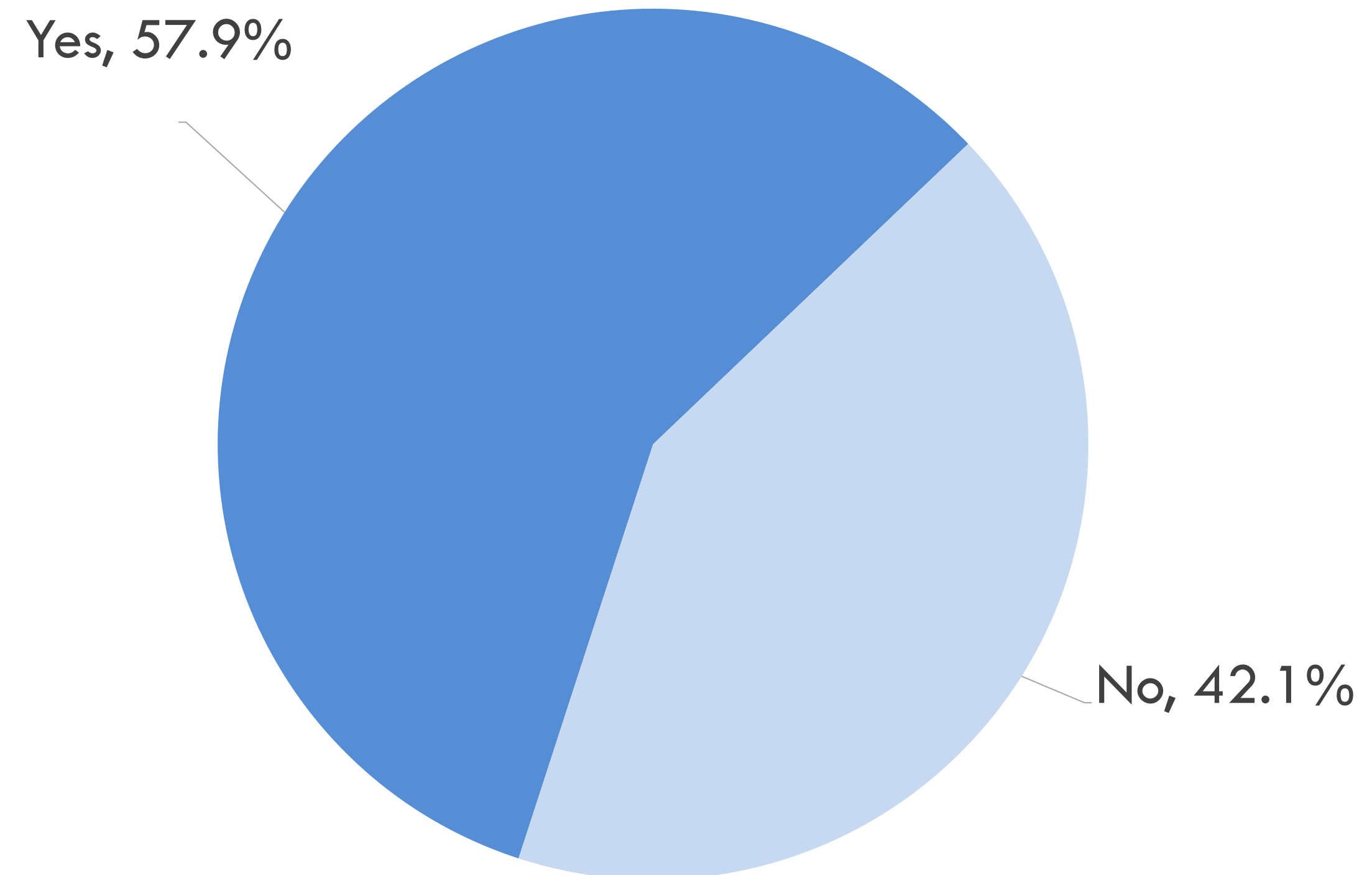
PERCEPTIONS OF ATTENDING SPORTING EVENTS AS UNSAFE

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



SUPER BOWL VIEWERSHIP

Question: Super Bowl LV was recently played at Raymond James Stadium in Tampa, Florida on February 7, 2021. Did you watch this Super Bowl on television, online or through a streaming service?

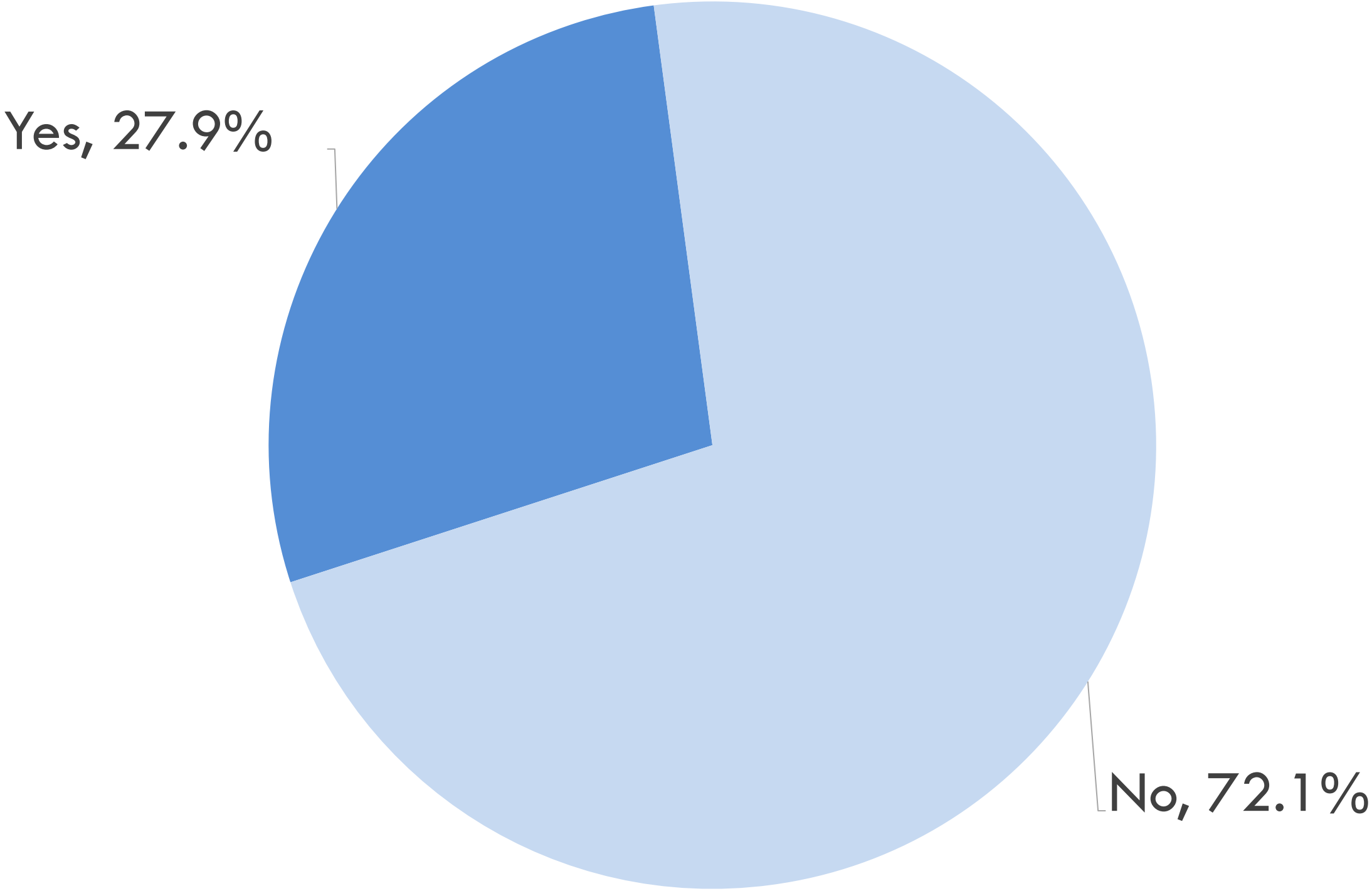


(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

RECALL OF TAMPA IMAGERY OR STORIES

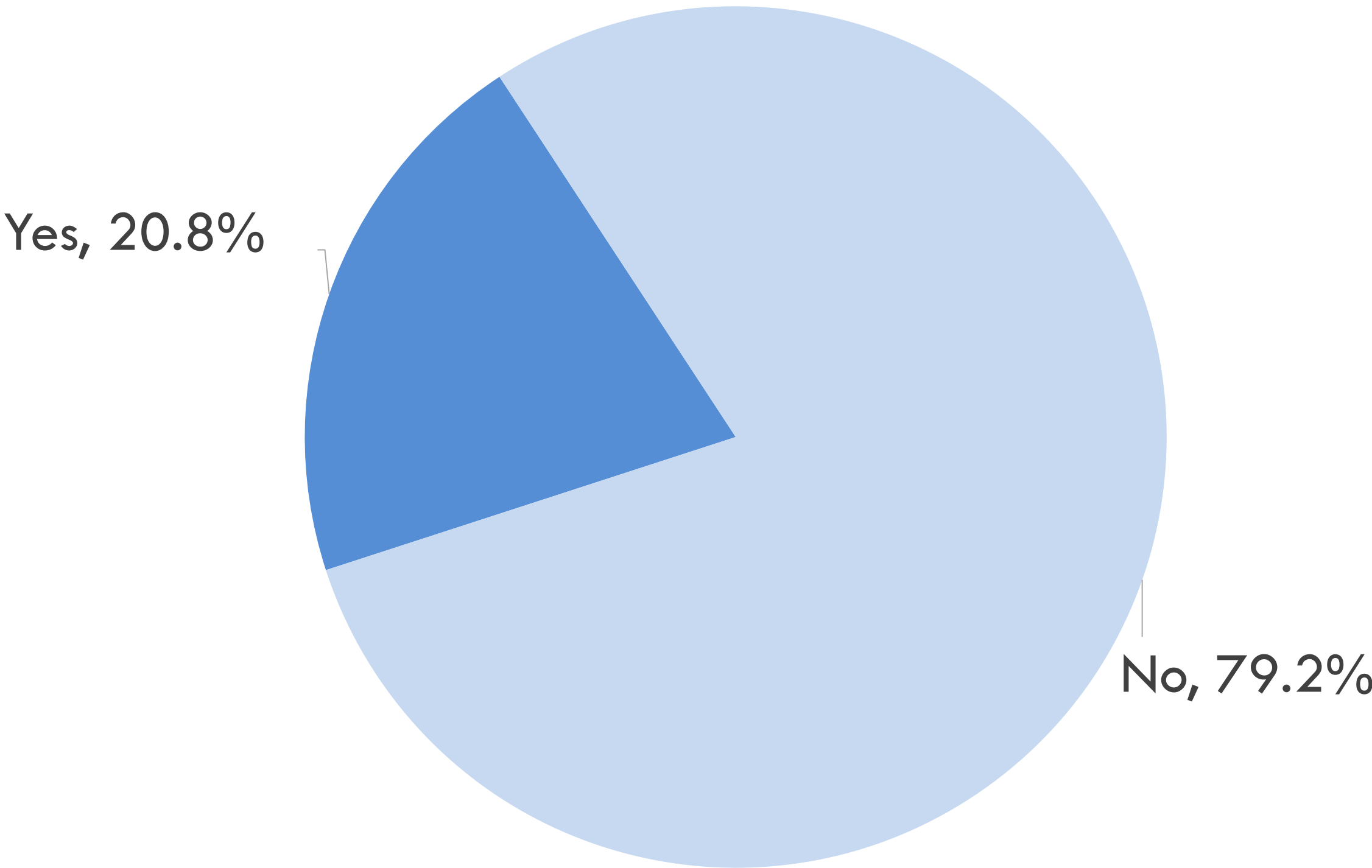
Question: At any time before or after the actual game was played, did you watch any Super Bowl-related television or online video content that featured images or stories about the **Tampa, Florida** area?

(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)



RECALL OF CLEARWATER – ST. PETERSBURG IMAGERY OR STORIES

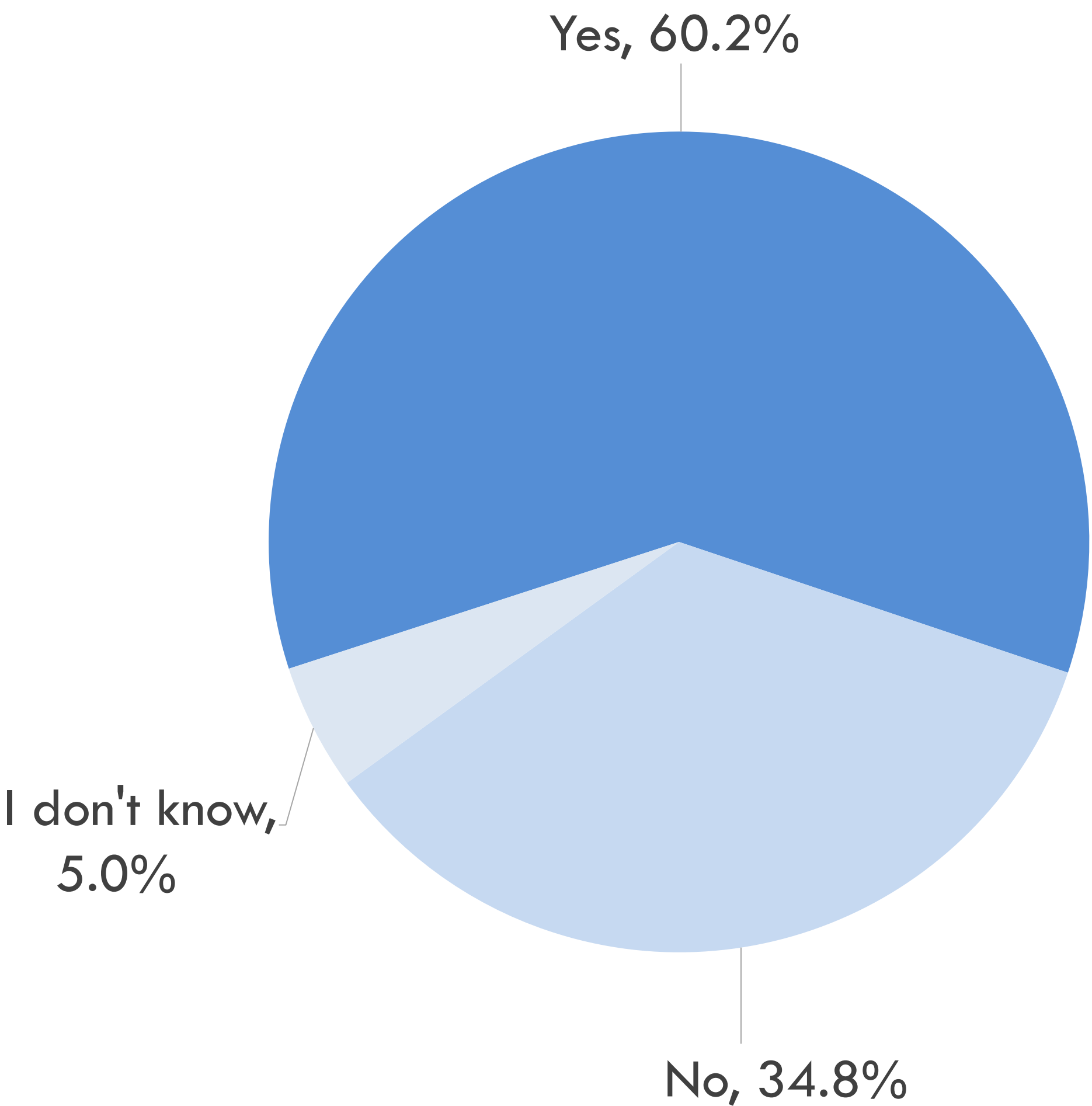
Question: Did you watch any Super Bowl-related television or online video content that featured any images or stories specifically about Clearwater - St. Petersburg, Florida?



(Base: Waves 49 data. All respondents, 1,216 completed surveys. Data collected February 12-14, 2021)

IMPACT ON INTEREST IN CLEARWATER – ST. PETERSBURG

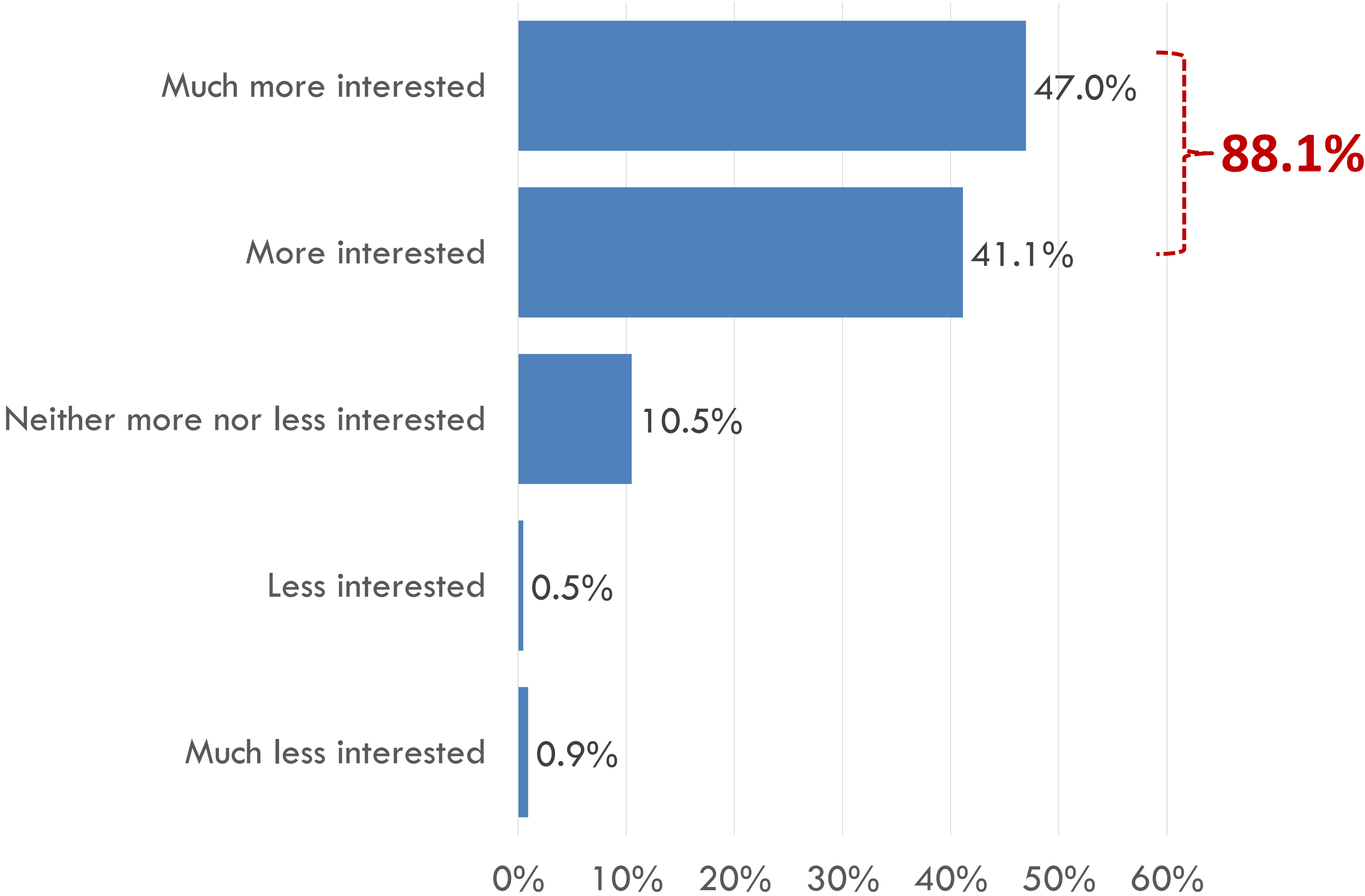
Question: Did the Super Bowl-related television or online video content that you saw affect your interest in visiting the Clearwater - St. Petersburg, Florida area?



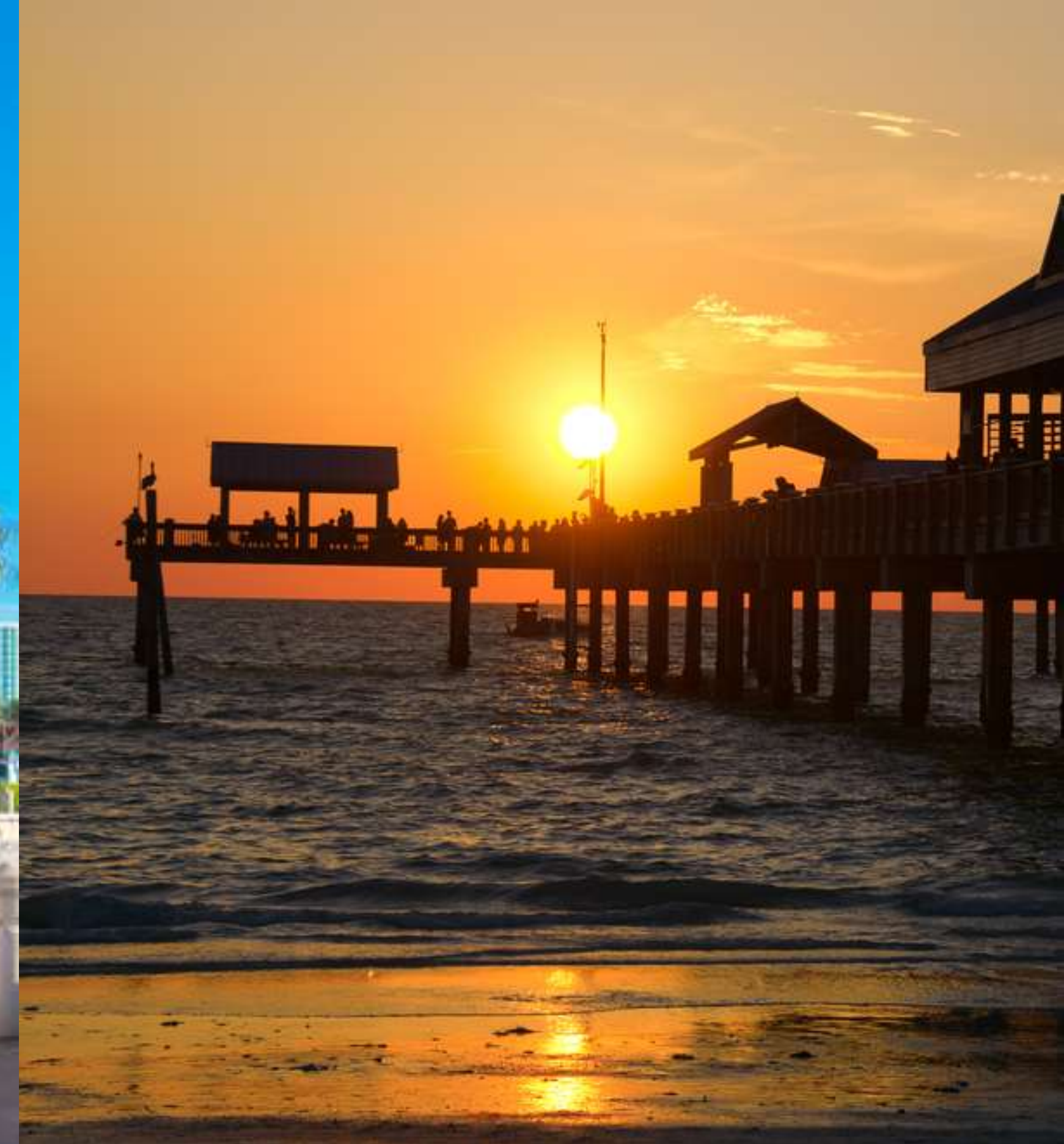
(Base: Waves 49 data. Respondent who saw Clearwater St. Petersburg content, 238 completed surveys. Data collected February 12-14, 2021)

IMPACT ON INTEREST TO VISIT CLEARWATER – ST. PETERSBURG

Question: How did this programming affect your interest in visiting the Clearwater - St. Petersburg, Florida area?



(Base: Waves 49 data. Respondents who saw imagery or stories about Clearwater – St. Petersburg, 145 completed surveys. Data collected February 12-14, 2021)



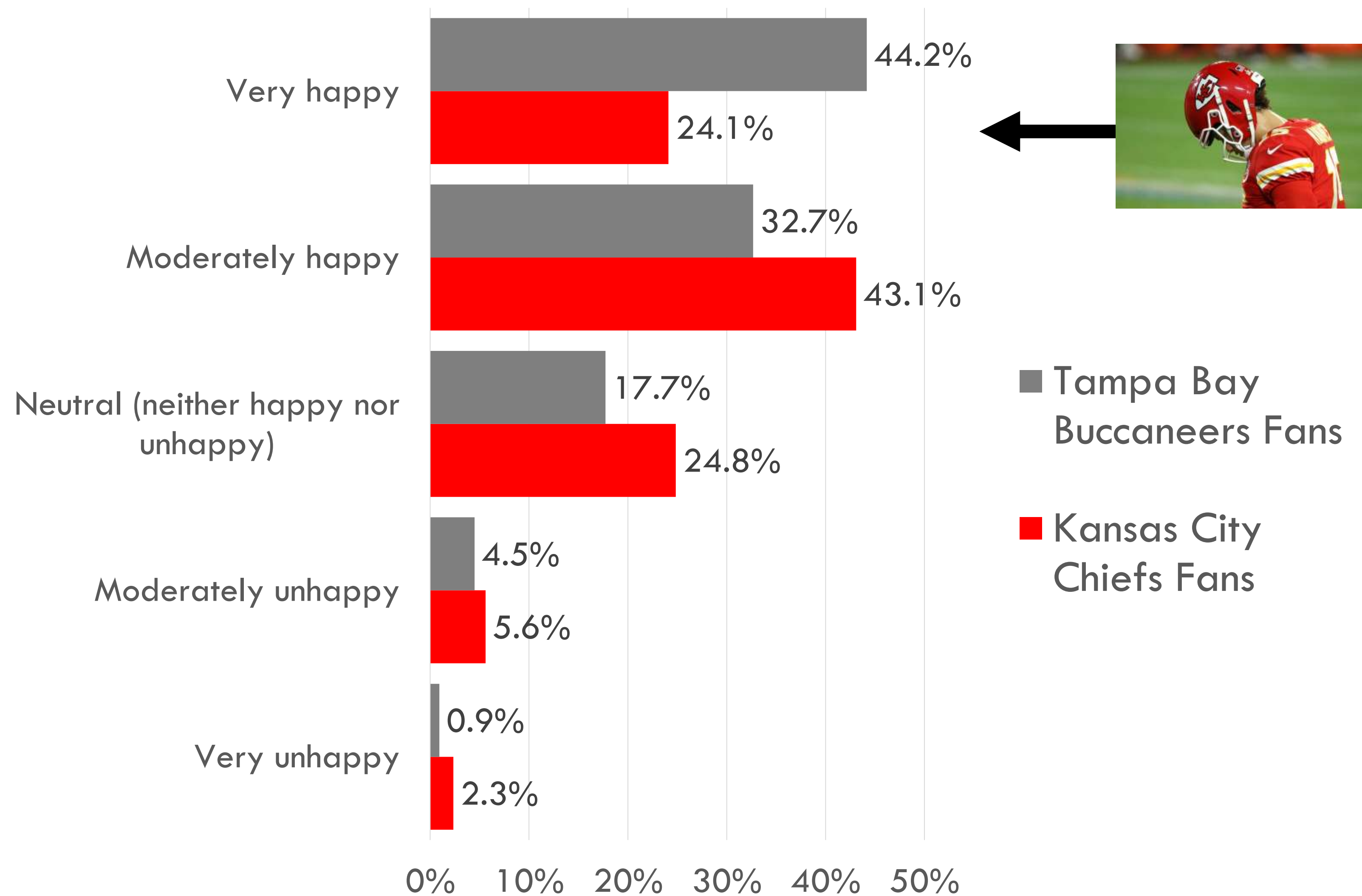
11%

“More interested” or “Much more interested”
in visiting Clearwater – St. Petersburg



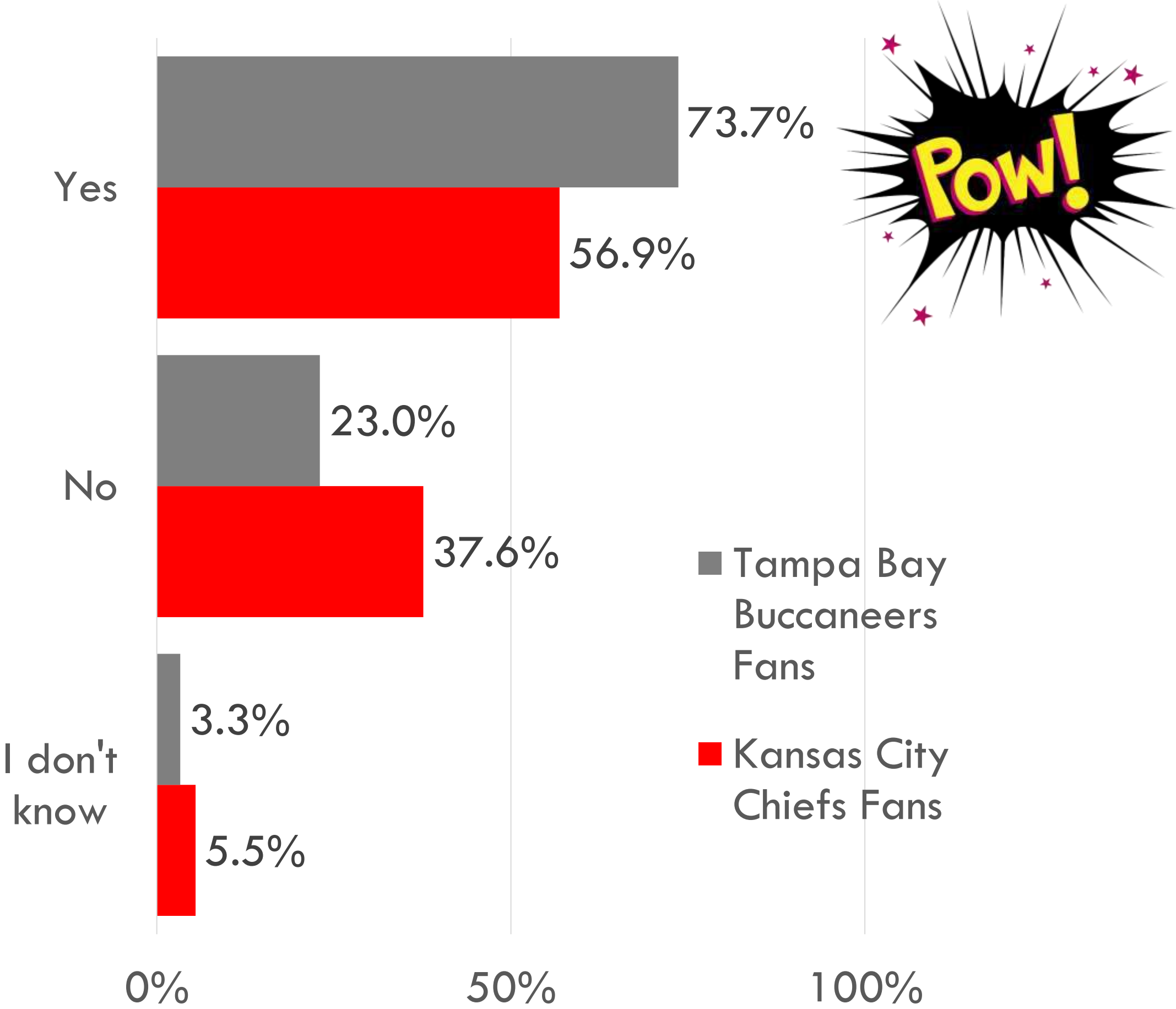
DOES HAPPINESS DEPEND ON WHERE YOU LIVE?

Question: Taking all things together, how happy would you say you are in your life?
(Select one)

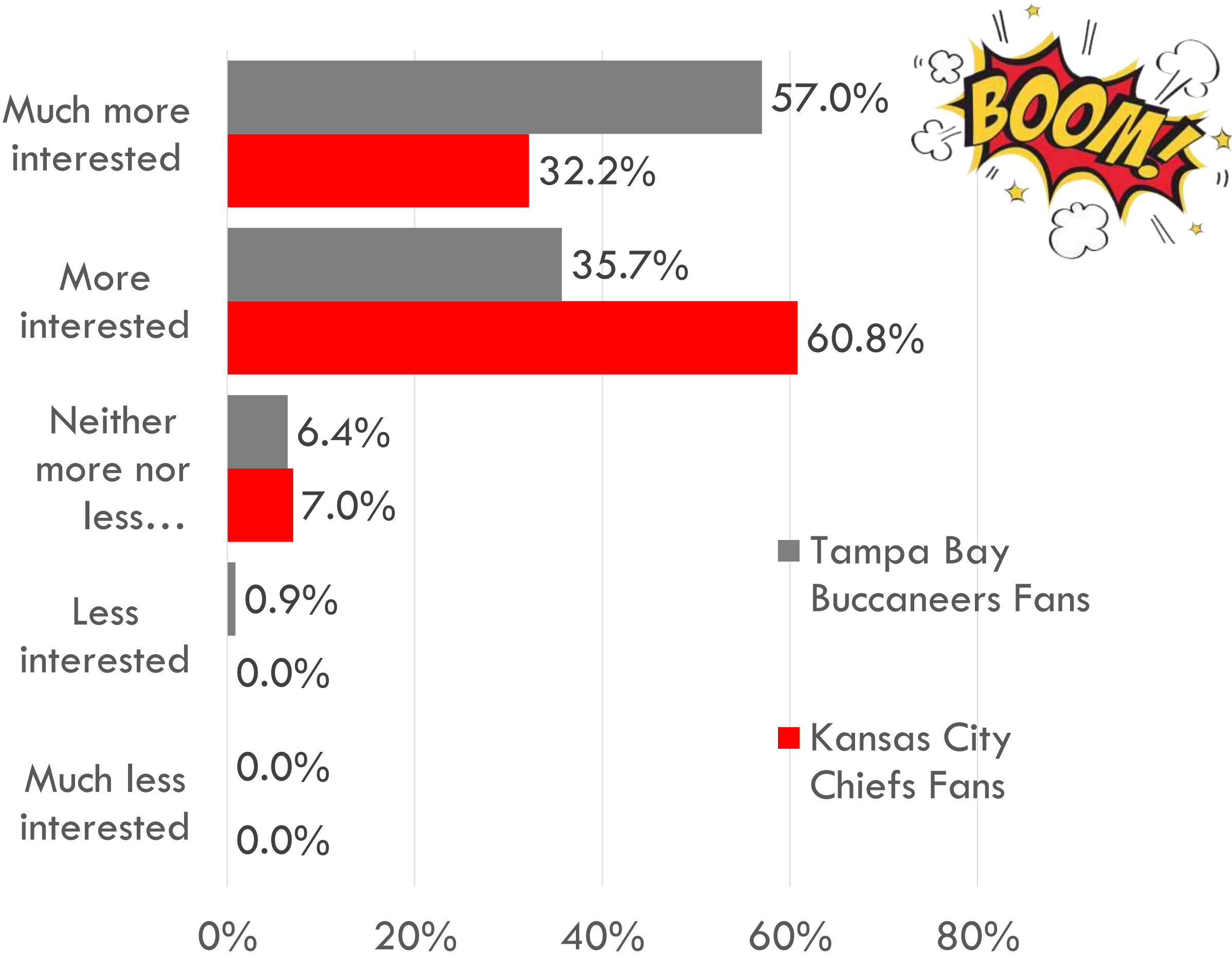


TEAM LOYALTY MATTERS???

Question: Did the Super Bowl-related television or online video content that you saw affect your interest in visiting the Clearwater - St. Petersburg, Florida area?



Question: How did this programming affect your interest in visiting the Clearwater - St. Petersburg, Florida area?



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

Destination APOLLO

Destination Intelligence + Management System

UPCOMING WEBINAR

THE VALUE OF DMOS

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

Thursday, February 25, 3pm ET

Destination  Analysts

miles
PARTNERSHIP

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



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

Send suggestions or requests for questions to:

**Info@DestinationAnalysts.com &
Myha@DestinationAnalysts.com**