

A couple is seen from behind, paddling a wooden canoe on a calm lake. The sun is setting or rising, creating a warm, golden glow across the sky and water. The surrounding landscape is lush with evergreen trees on the hillsides. The water reflects the light from the sky and the silhouettes of the trees.

# THE STATE OF THE AMERICAN TRAVELER: DESTINATIONS EDITION

JANUARY 28, 2021

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Destination  Analysts

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# With You

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**Chris Adams**

*Head of Research and Insights  
Miles Partnership*



**Dave Bratton**

*Founder & Managing Director  
Destination Analysts*



**Laura Libby**

*Senior Vice President  
Miles Partnership*

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# Panelists

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**Jillian Simpson**

*Vice President  
Alaska Travel Industry Association*



**Lynn Bruni-Perkins**

*VP, Global Marketing Communications  
San Francisco Travel*

# THE STATE OF THE AMERICAN TRAVELER: DESTINATIONS EDITION

Research, slides and other resources will be available at  
[www.milespartnership.com/SAT](http://www.milespartnership.com/SAT)  
[www.destinationanalysts.com](http://www.destinationanalysts.com)





# Agenda

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1. Current Traveler Sentiment
2. Destinations Edition Research
3. Panelist Discussion
4. Additional Resources
5. Q&A

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# THE STATE OF THE AMERICAN TRAVELER

## Destinations Edition, 2021

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# The State of the American Traveler



Destination Analysts

## Segments Edition

The Coronavirus has been a disaster for the travel industry. We have learned that perhaps no industry is more vulnerable to the fear instilled by a pandemic than our industry. The summer edition of The State of the American Traveler is typically dedicated to understanding different traveler segments marketed to by Destination Marketing Organizations (DMOs). Obviously, in the current environment, this data would be of limited value, as few in any DMOs are engaging with the marketplace in the traditional fashion. As such, we are repositioning this summer edition to first examine traveler sentiment in its historical context,

then presenting a segmentation analysis that examines what types of travelers are currently ready to travel. It is our hope that this simplified edition can yield value to the DMO community, while not straying too far from this research's customary foundation. In short, our hope is that this market intelligence can help the DMO industry to shape its big picture thinking as we move through these extraordinarily challenging times. As always, if you have questions or ideas for future survey topics, we welcome you to message us: [info@destinationanalysts.com](mailto:info@destinationanalysts.com) or [@DA\\_Research](https://twitter.com/DA_Research).

[info@destinationanalysts.com](mailto:info@destinationanalysts.com) [@DA\\_Research](https://twitter.com/DA_Research)

- Quarterly online survey conducted since 2006
- Data collected in mid-January
- Examines traveler sentiment, motivations & behaviors
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000 American leisure travelers

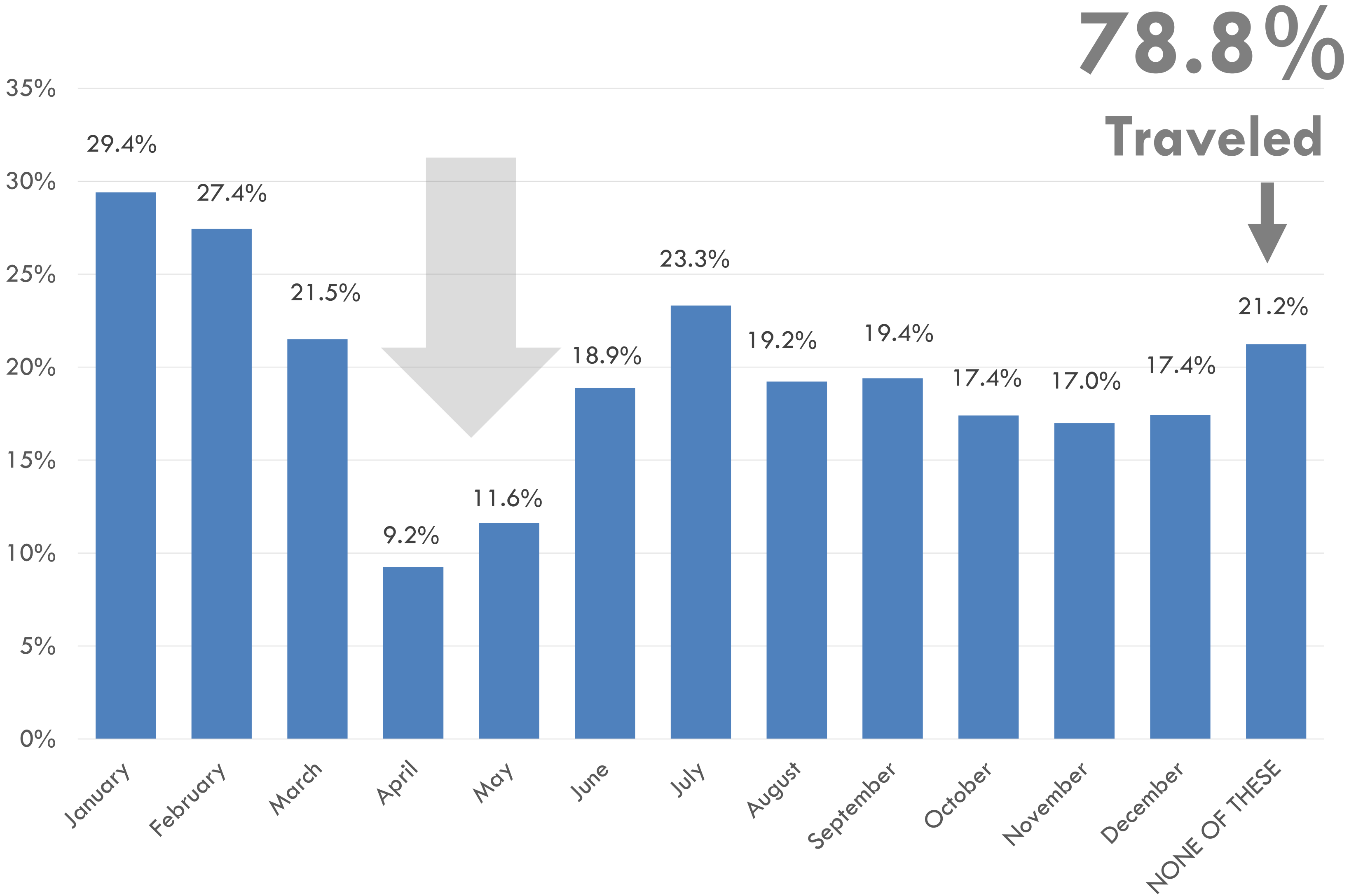
Destination Analysts  
DO YOUR RESEARCH



# 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: Coronavirus Travel Sentiment Survey, Destination Analysts, Inc. Waves 43 data. All respondents, 1,206 completed surveys. Data collected January 1-3, 2021)





# AGENDA.

- **Current Traveler Sentiment**
- **Destination Travel Plans, 2021**
- **Desired Experiences**
- **Travel Planning Resources**
- **Travel Aspirations**
- **Special Section:  
Destination  
Performance  
Benchmarking**





# CURRENT TRAVELER SENTIMENT

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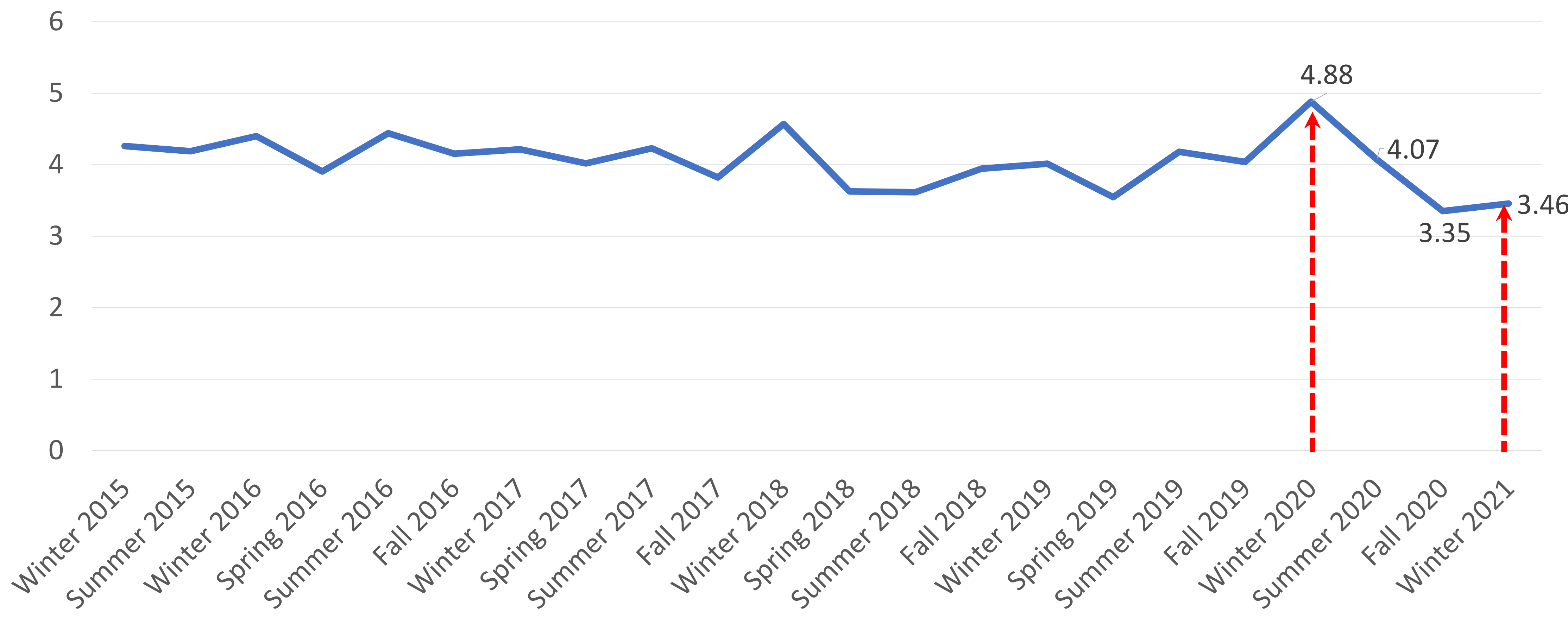


**Question: In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?**



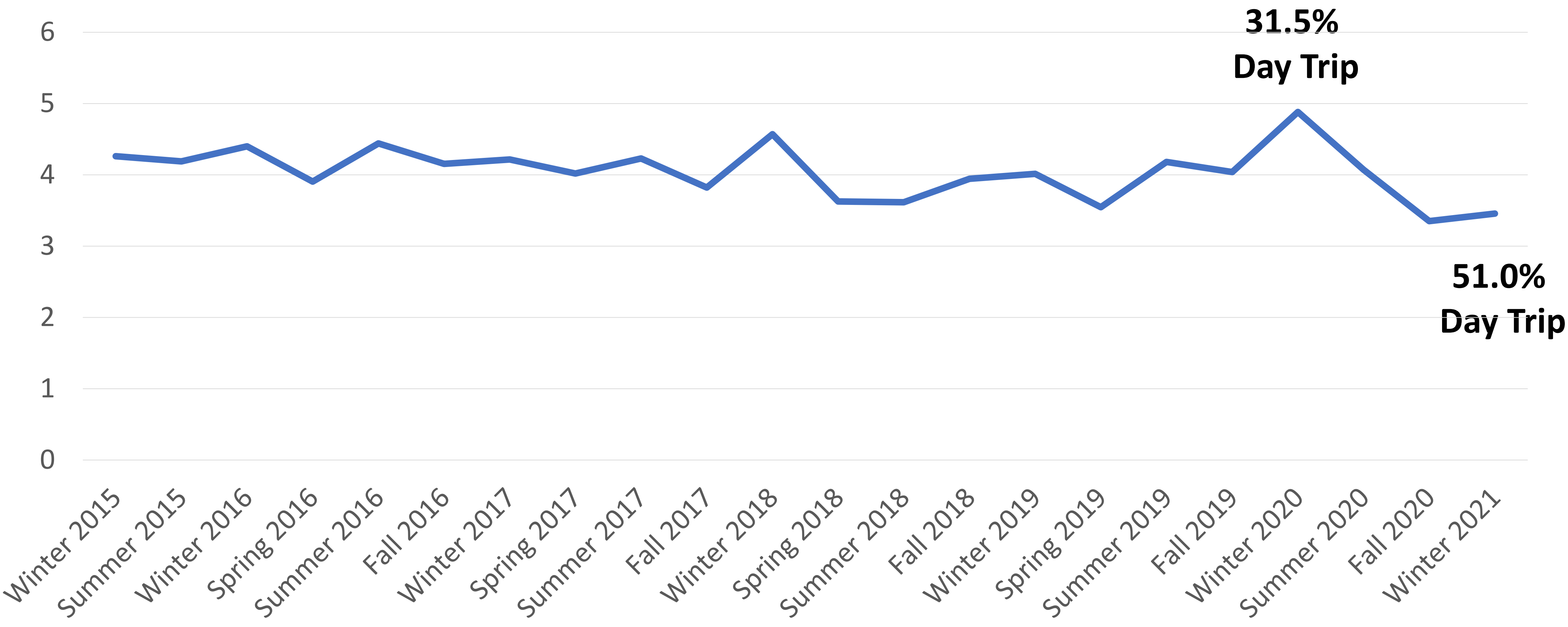
# LEISURE TRIPS IN THE PAST 12 MONTHS

**Question:** In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?



# LEISURE TRIPS IN THE PAST 12 MONTHS

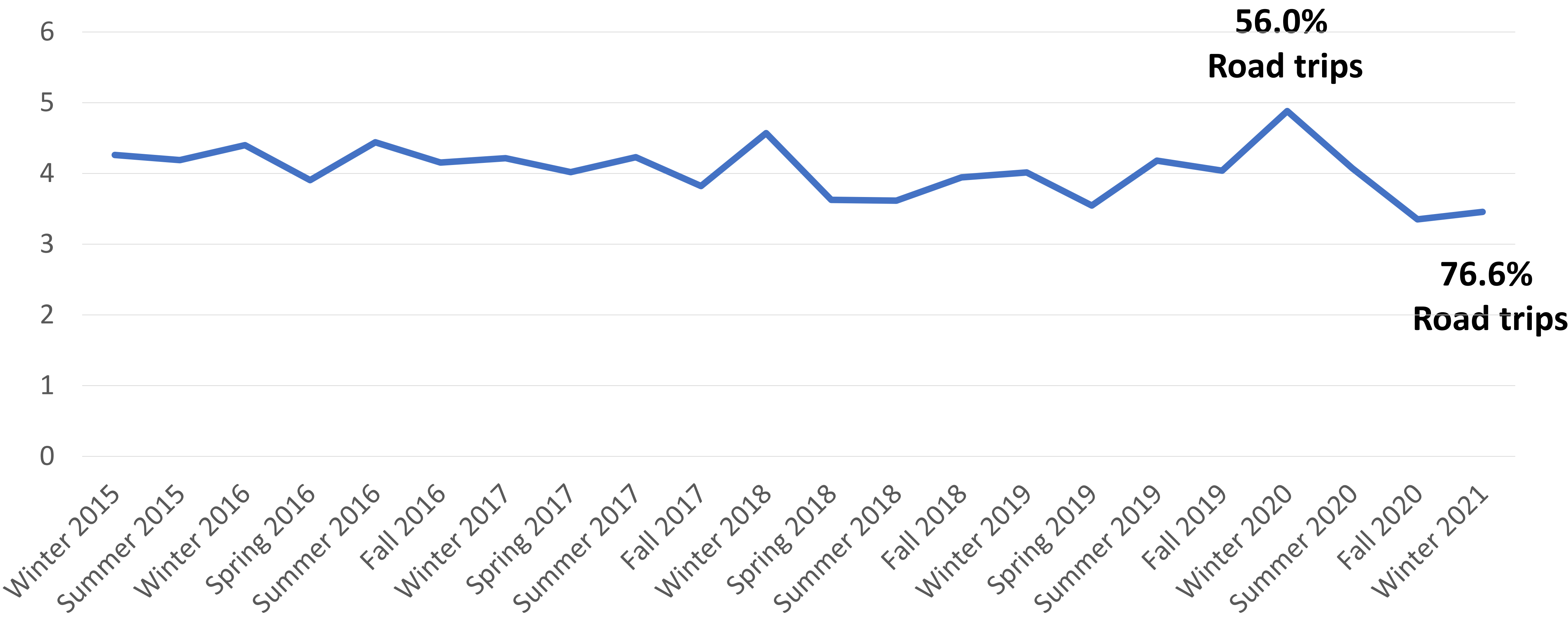
**Question:** In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?





# LEISURE TRIPS IN THE PAST 12 MONTHS

**Question:** In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?





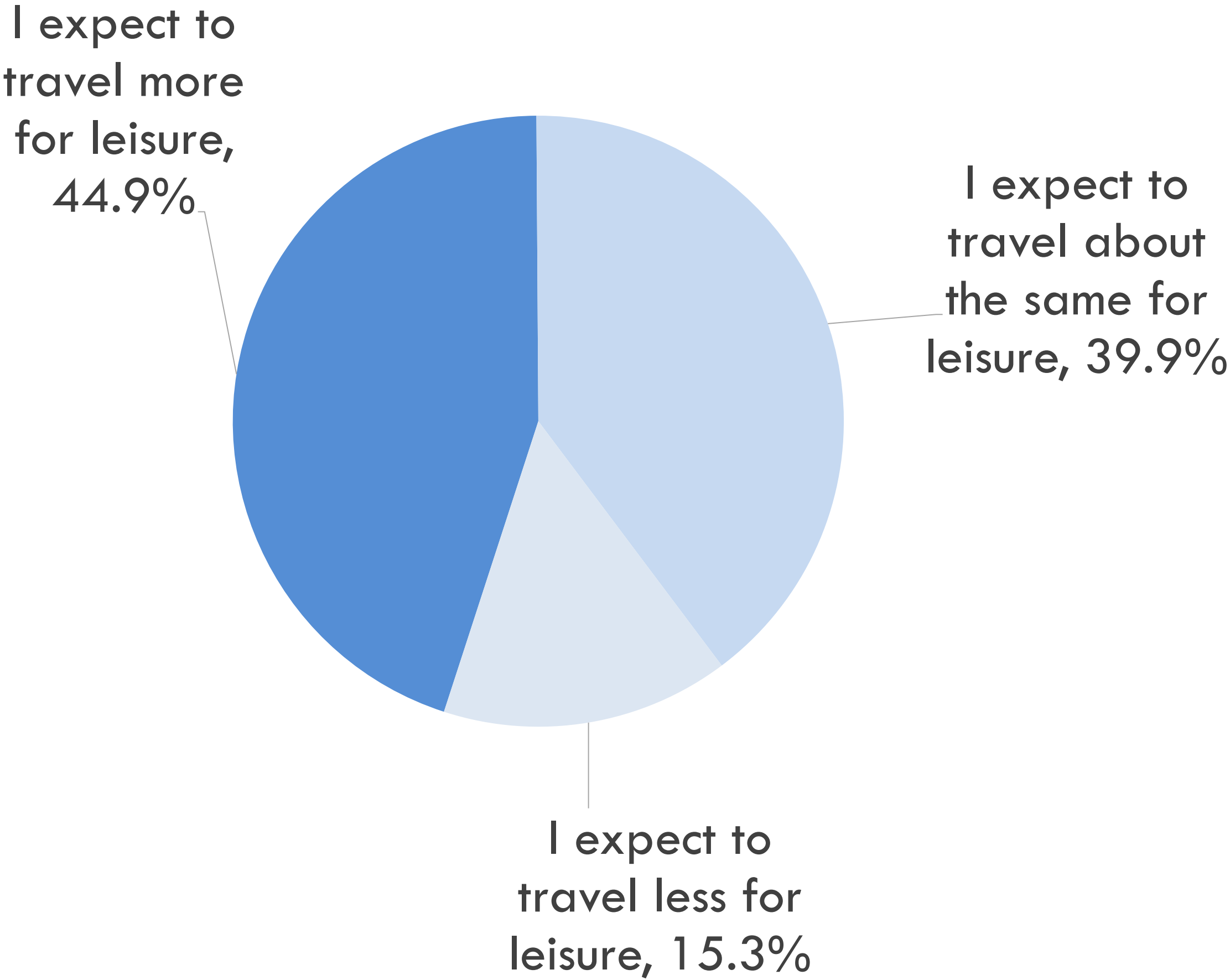


**Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?**



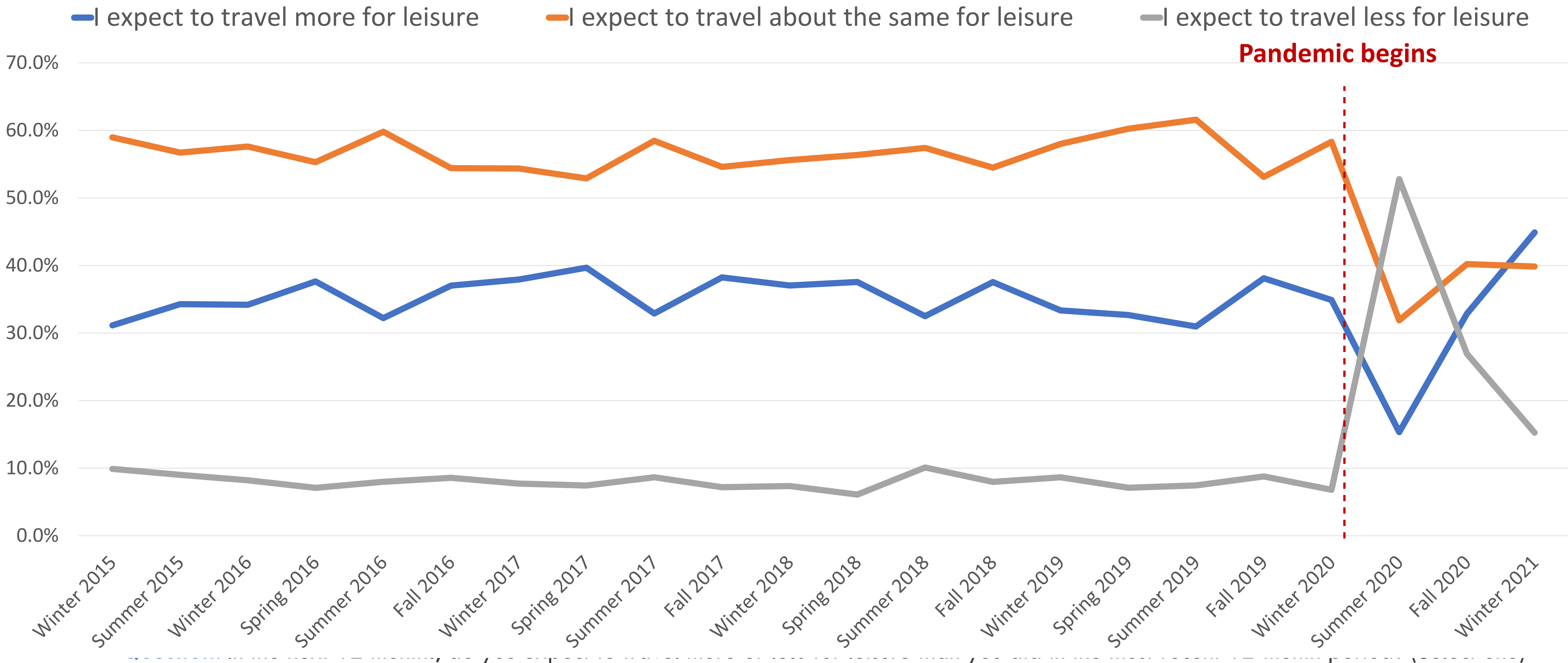
# TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS

**Question:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)





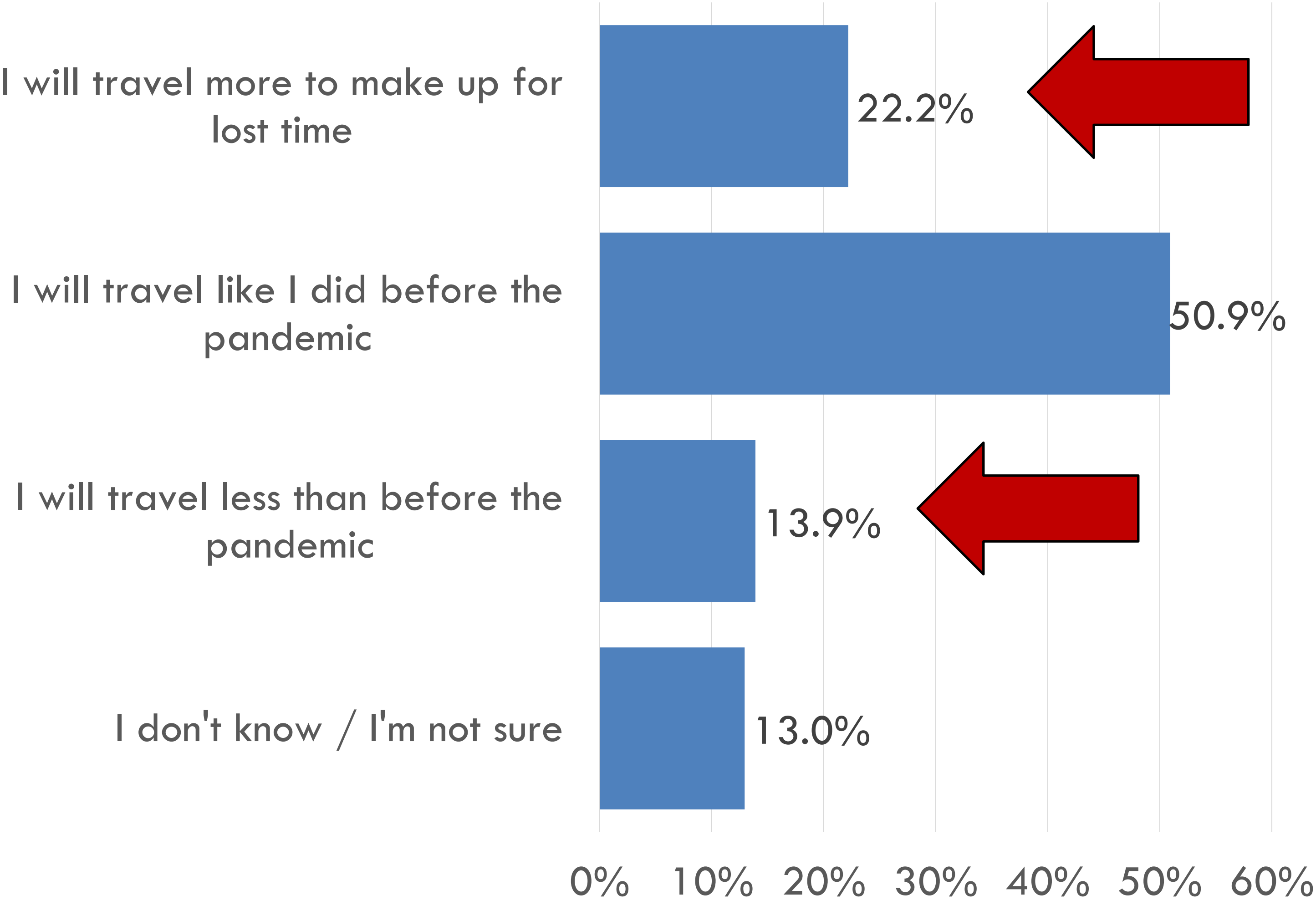
# TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



# 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?

**SOURCE:** CORONAVIRUS TRAVEL SENTIMENT INDEX, DESTINATION ANALYSTS, JANUARY 2021





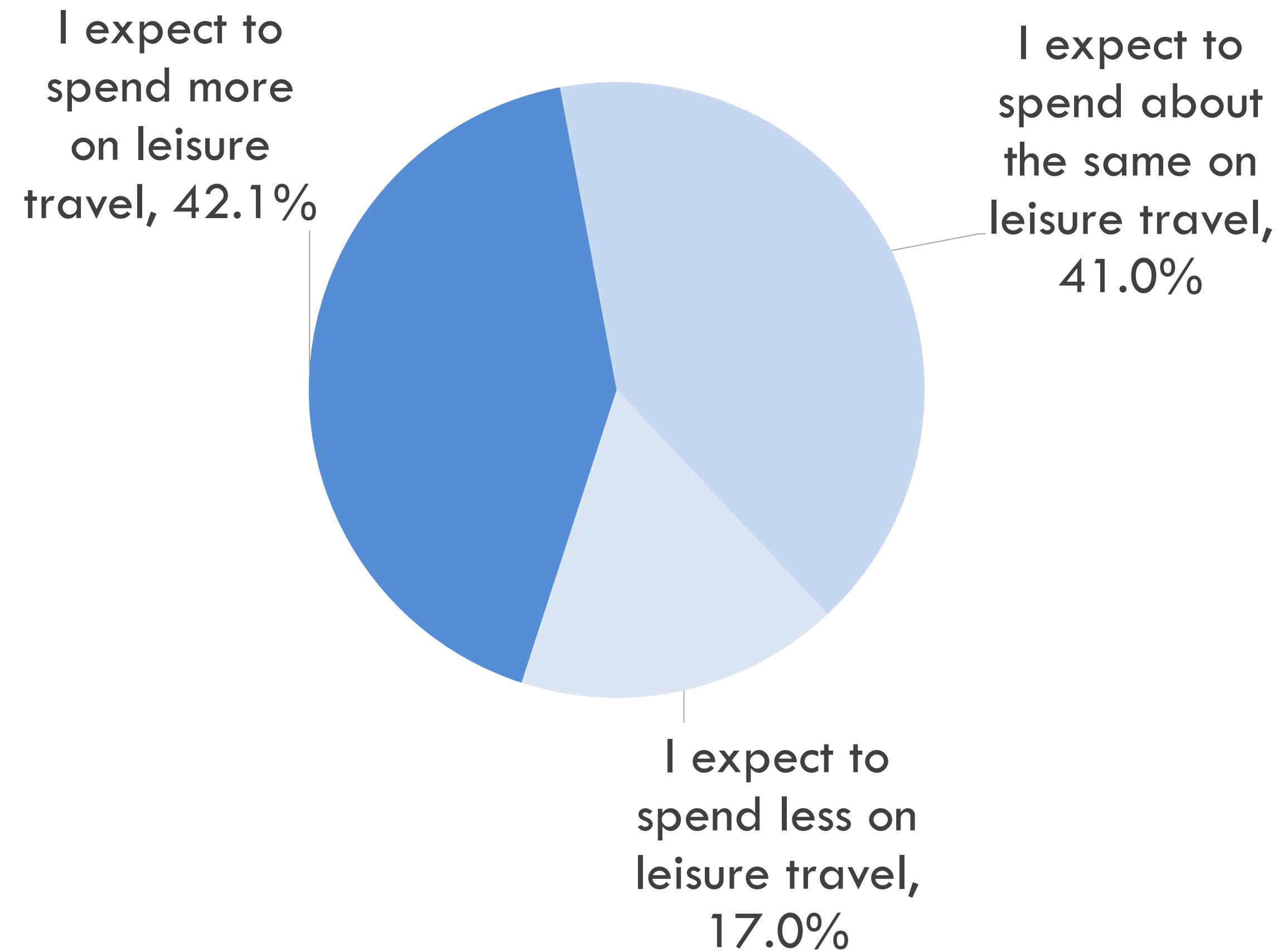


**Question:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?

# TRAVEL IN THE NEXT TWELVE MONTHS: SPENDING

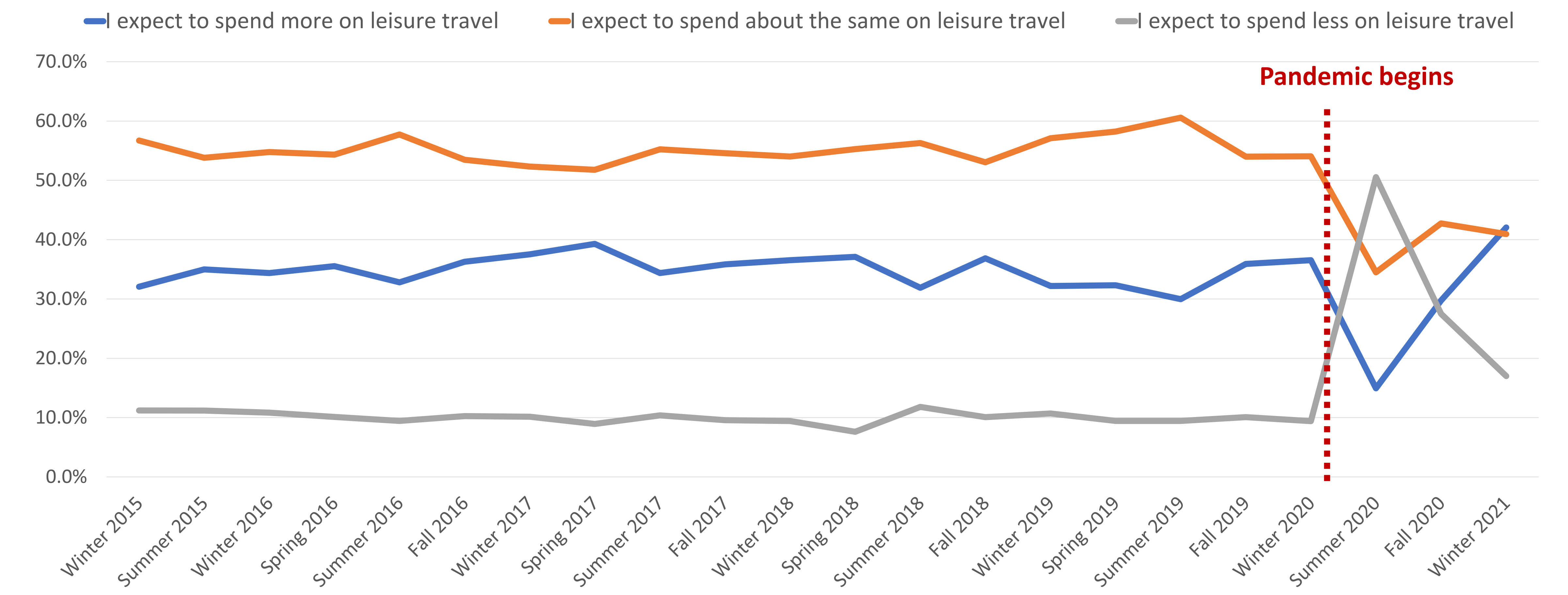
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**Question:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?





# TRAVEL IN THE NEXT TWELVE MONTHS: SPENDING



**Question:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?





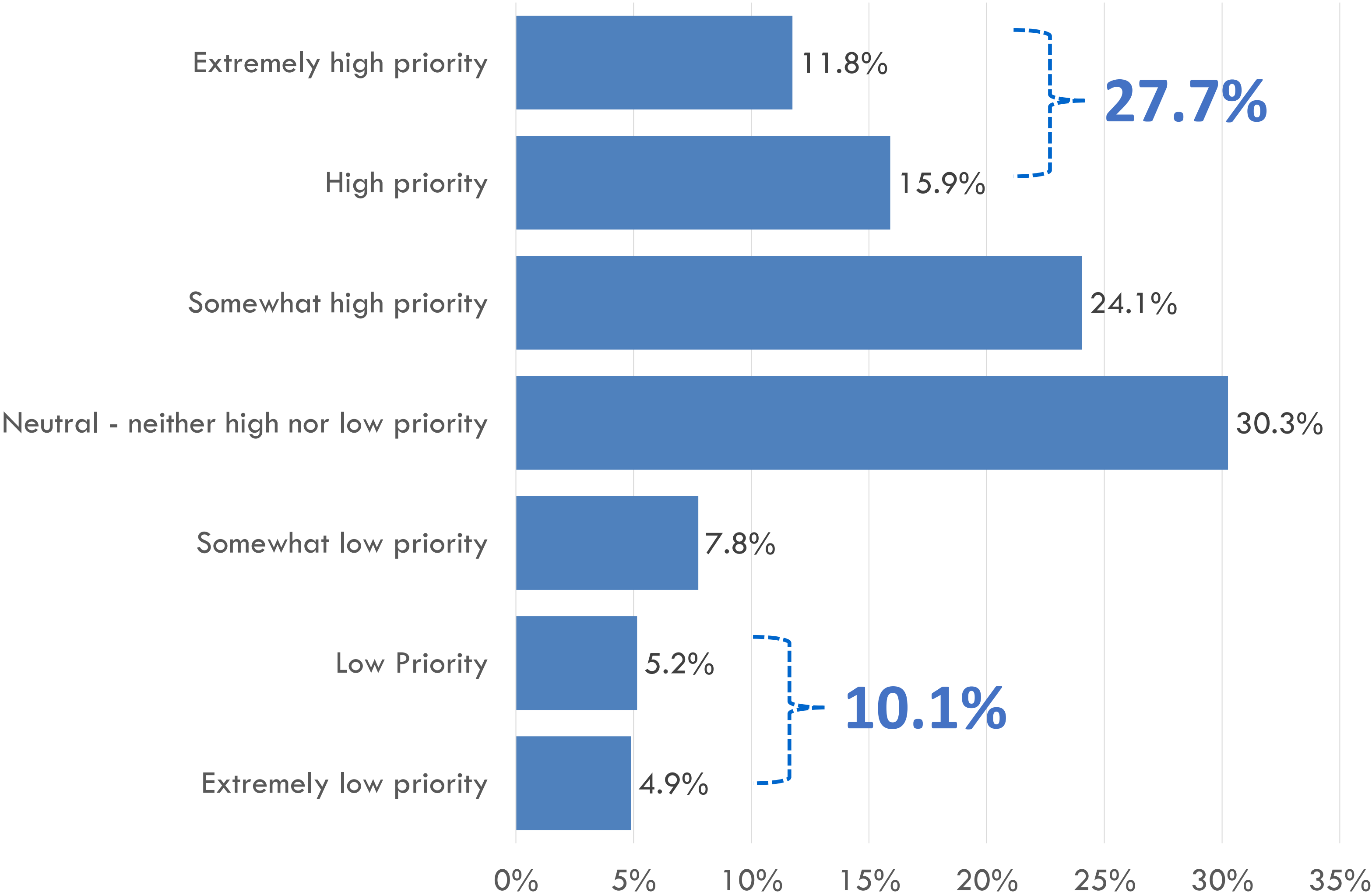
Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.



# LEISURE TRAVEL AS A SPENDING PRIORITY

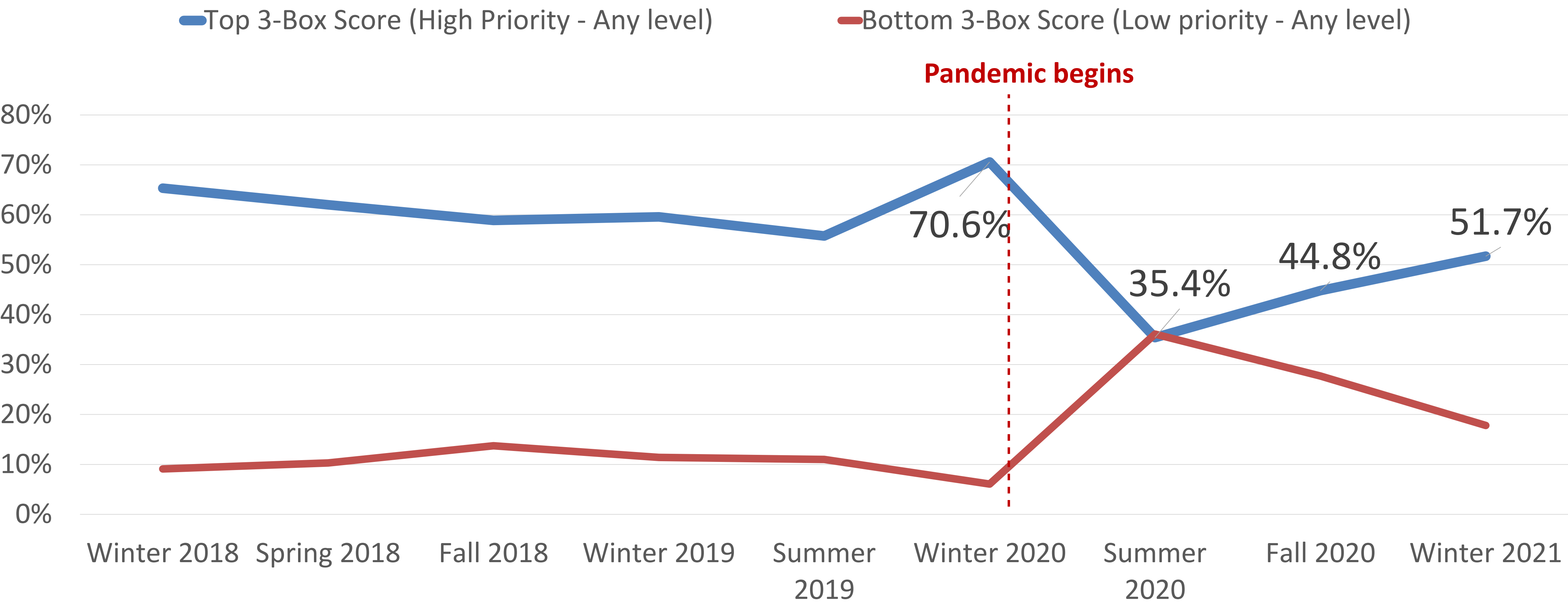
**Question:** Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

Leisure travel will be a \_\_\_\_\_





# LEISURE TRAVEL AS A SPENDING PRIORITY



**Question:** Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.



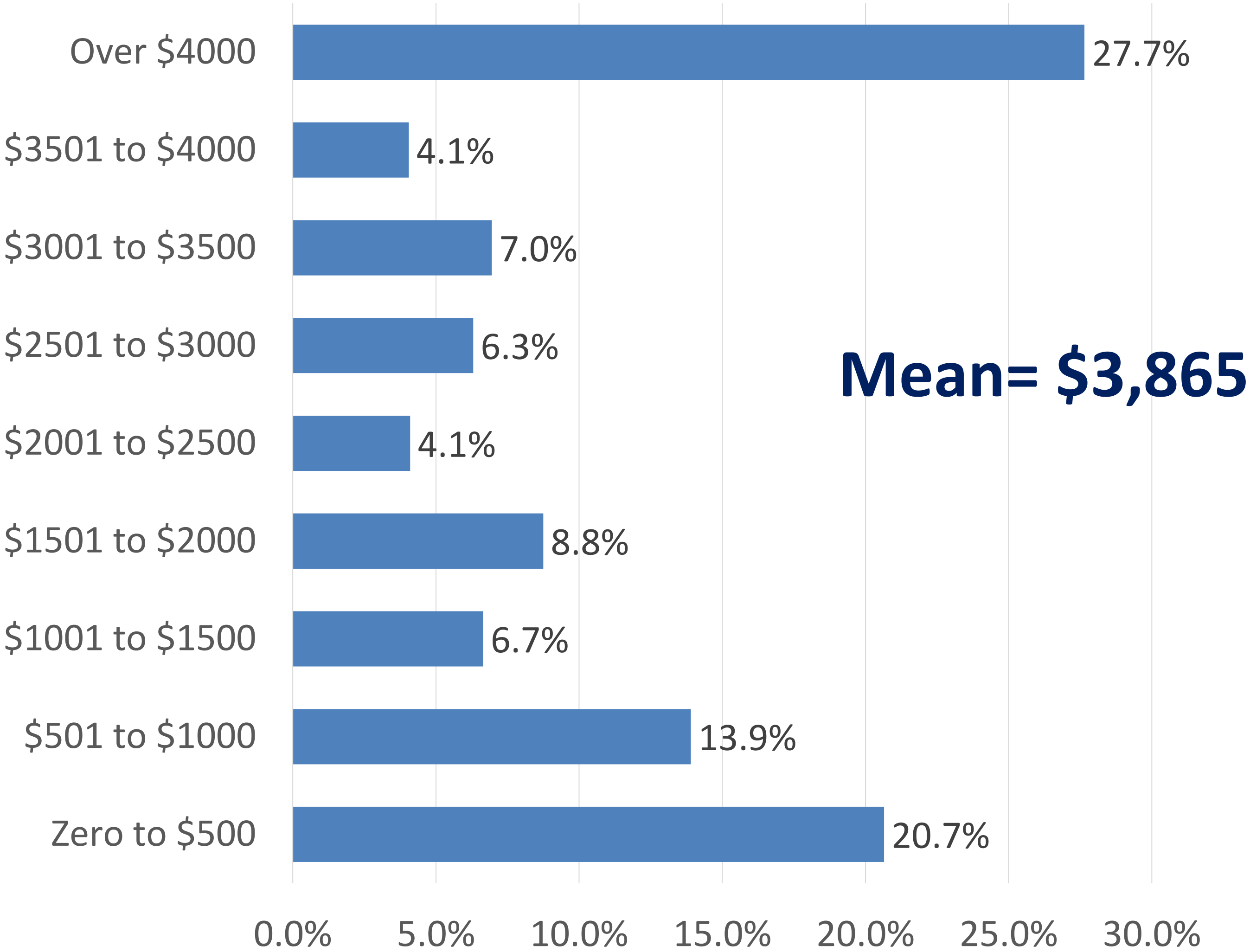
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?





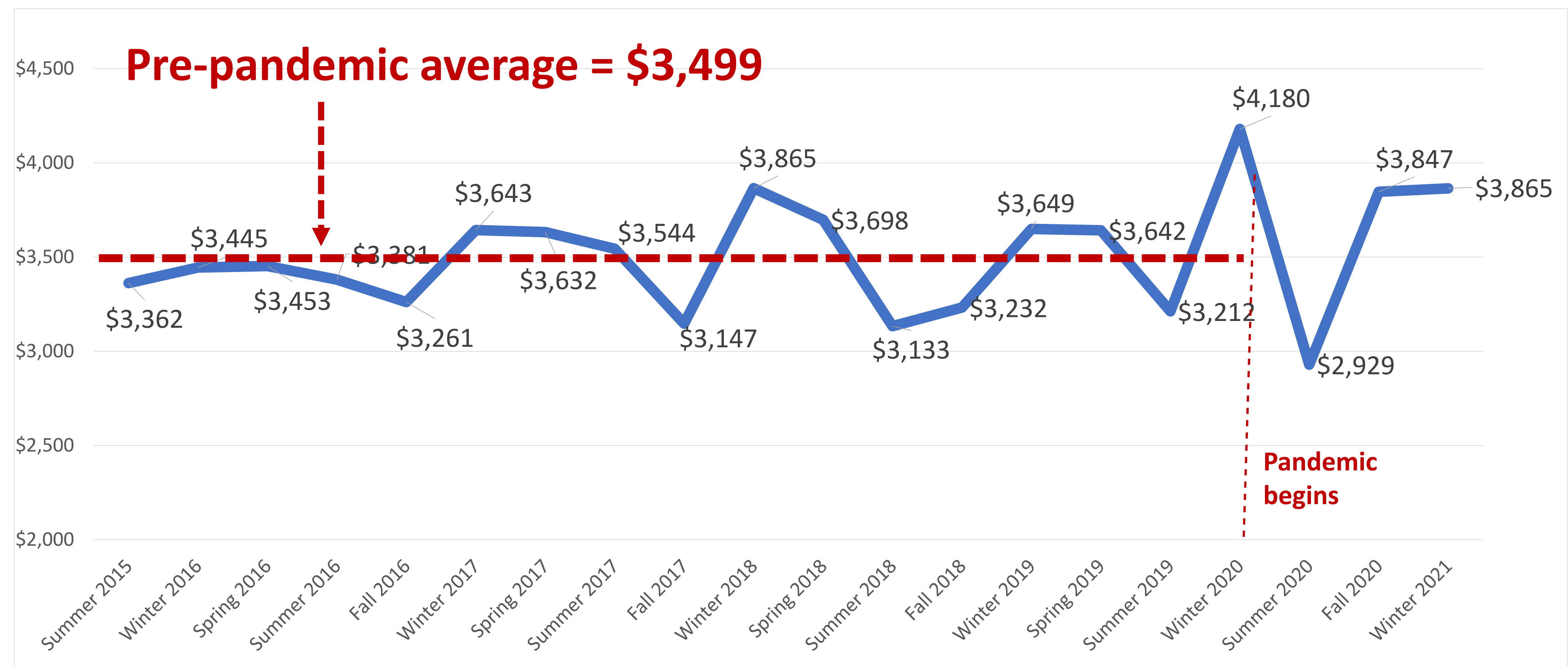
# MAXIMUM LEISURE TRAVEL BUDGET

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?





# MAXIMUM LEISURE TRAVEL BUDGET (MEAN)



**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?



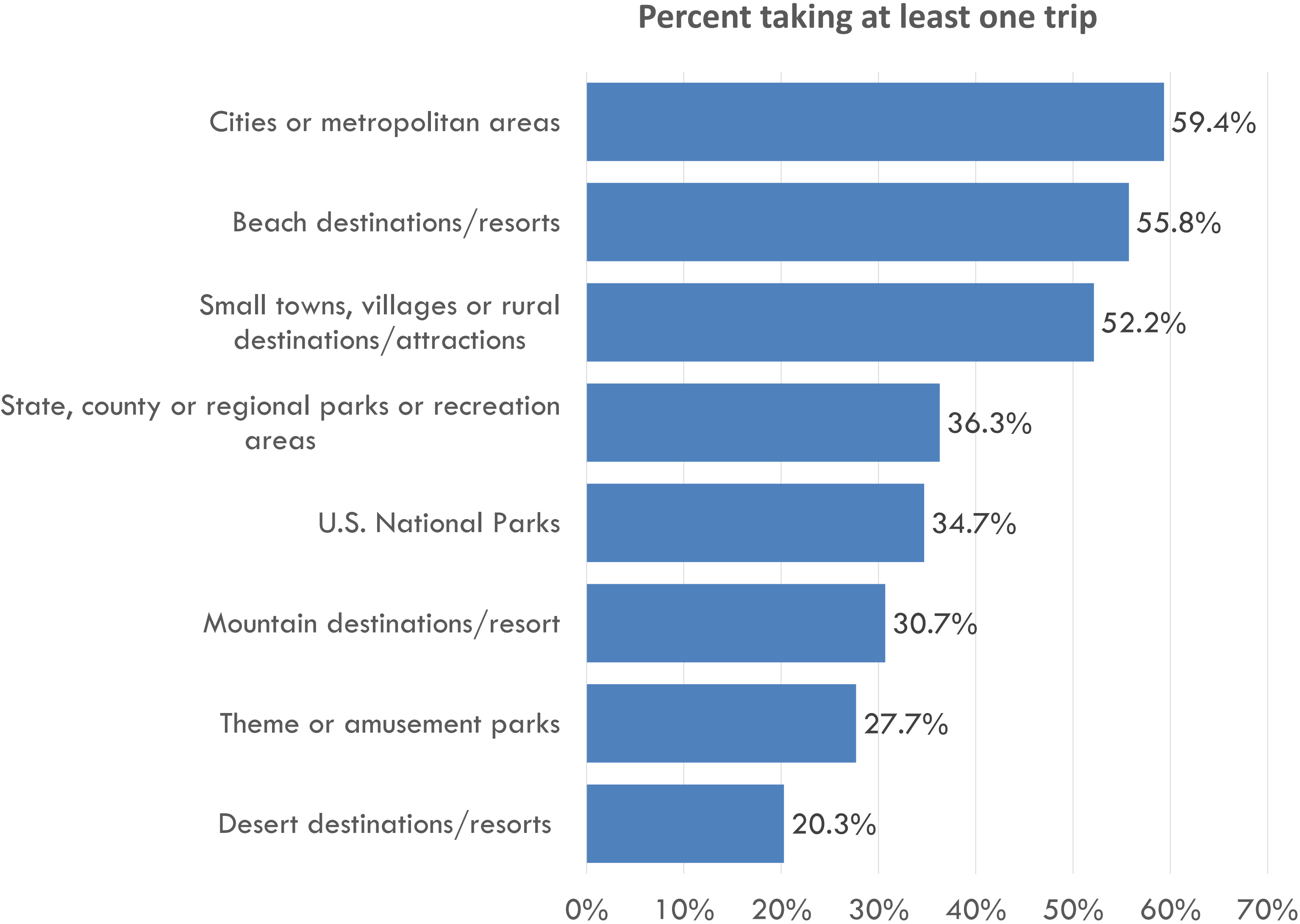


# Destination Travel Plans for 2021



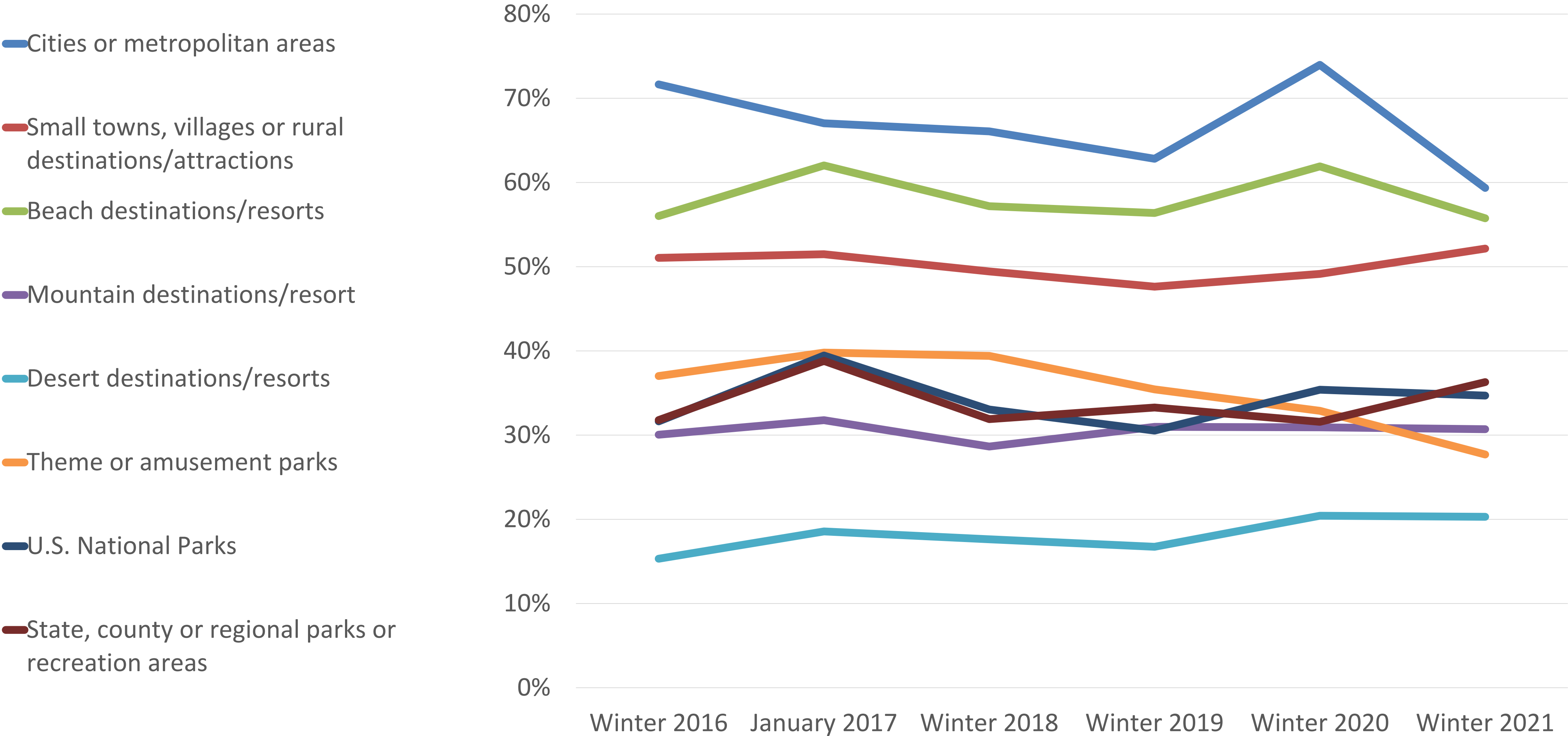
# EXPECTATIONS TO VISIT DESTINATION TYPES, 2021

**Question:** In the NEXT TWELVE MONTHS, how many trips will you take that will include each of the following types of leisure destinations?





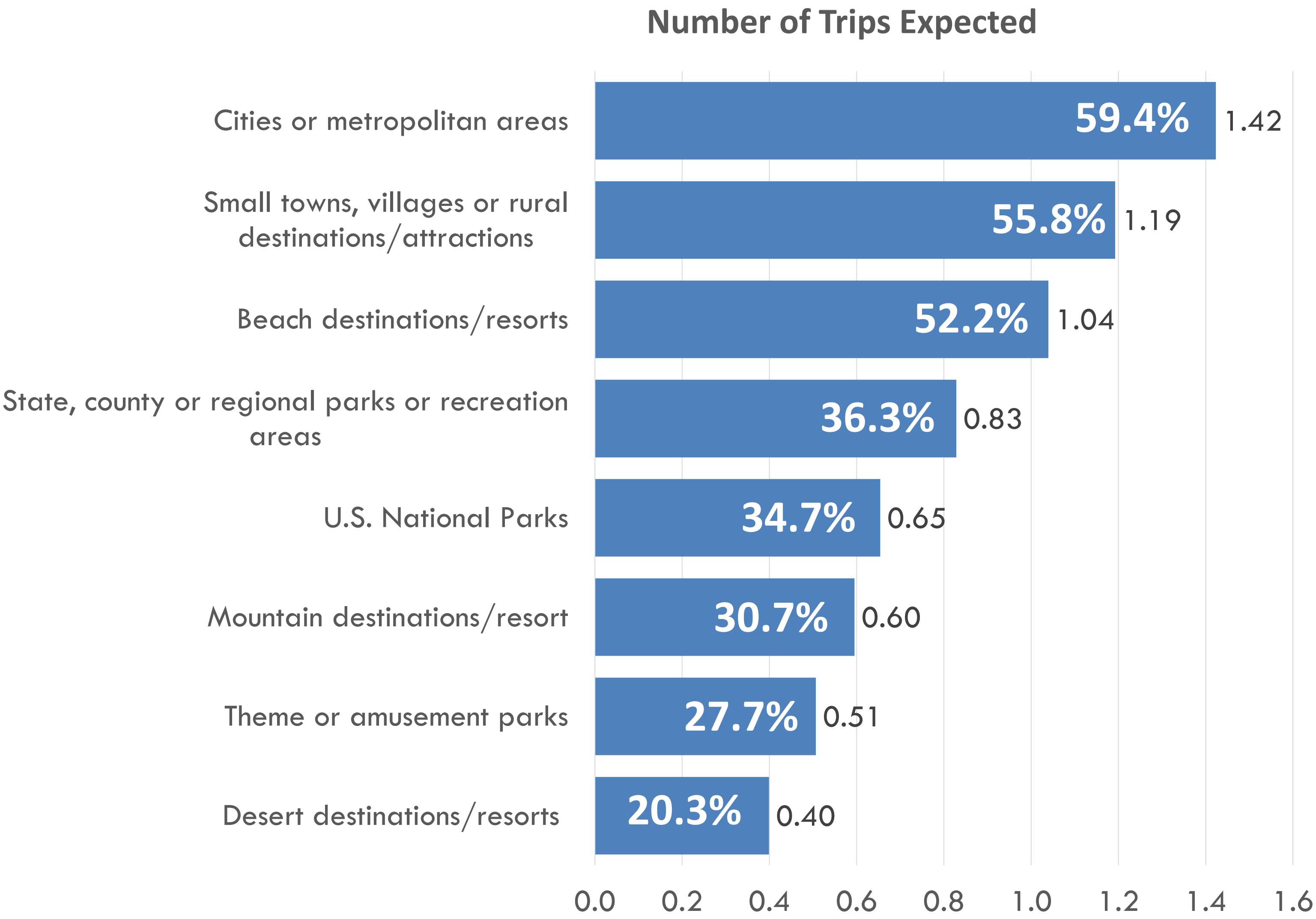
# EXPECTATIONS TO VISIT DESTINATION TYPES, 2016-2021



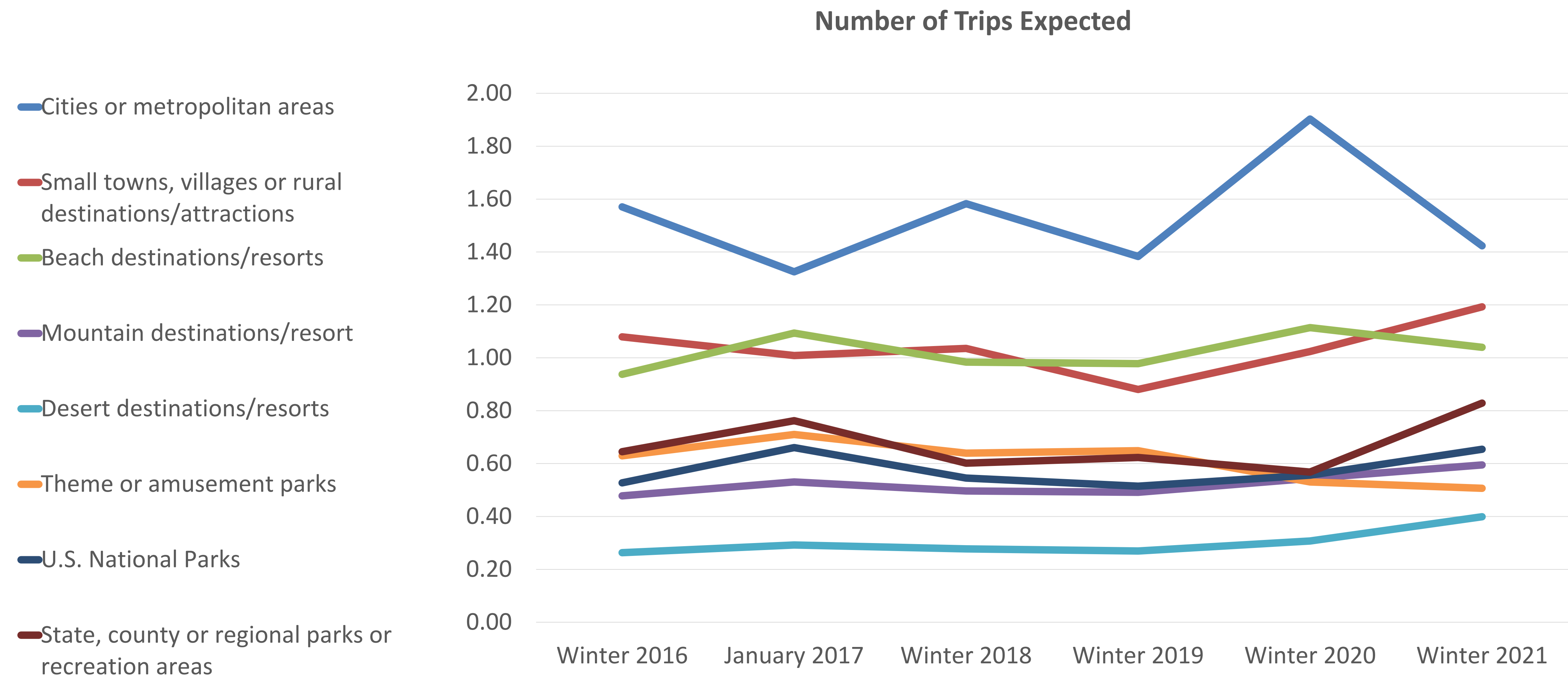


# NUMBER OF TRIPS EXPECTED IN 2021

**Question:** In the NEXT TWELVE MONTHS, how many trips will you take that will include each of the following types of leisure destinations?



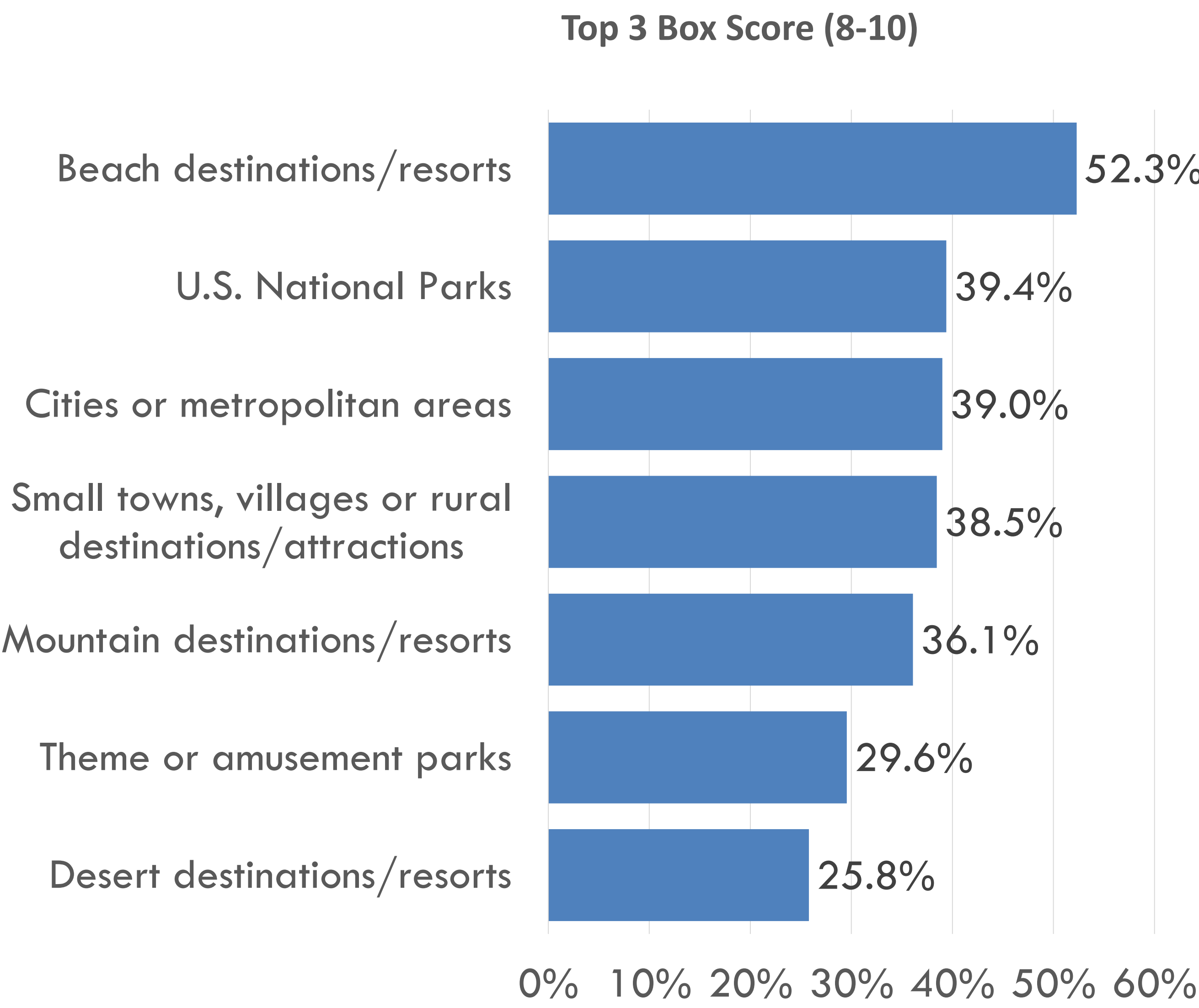
# TRIPS EXPECTED IN 2021





# DESTINATION EXCITEMENT

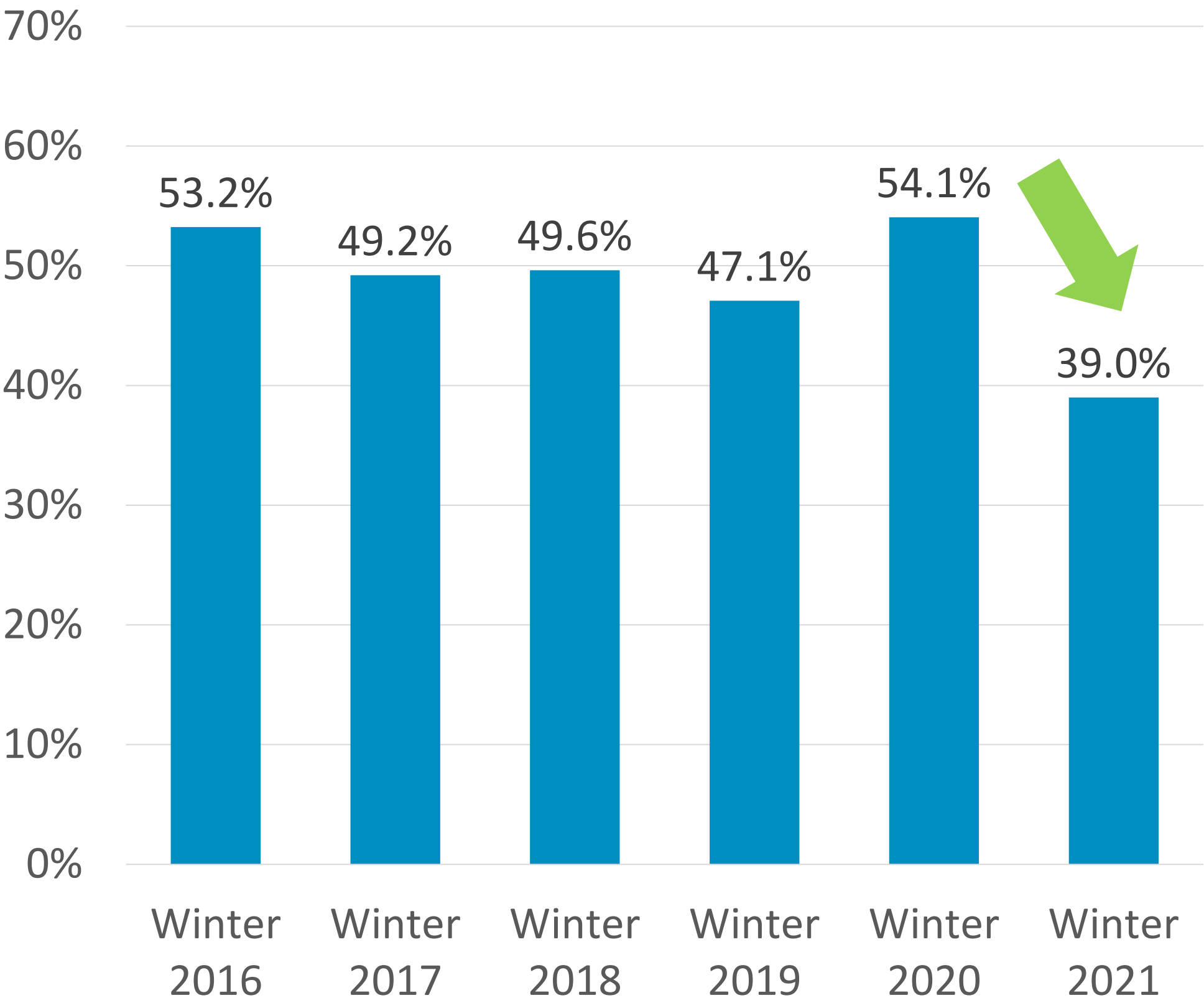
**Question:** Thinking carefully about THE NEXT TWELVE (12) MONTHS. Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year?



# DESTINATION EXCITEMENT

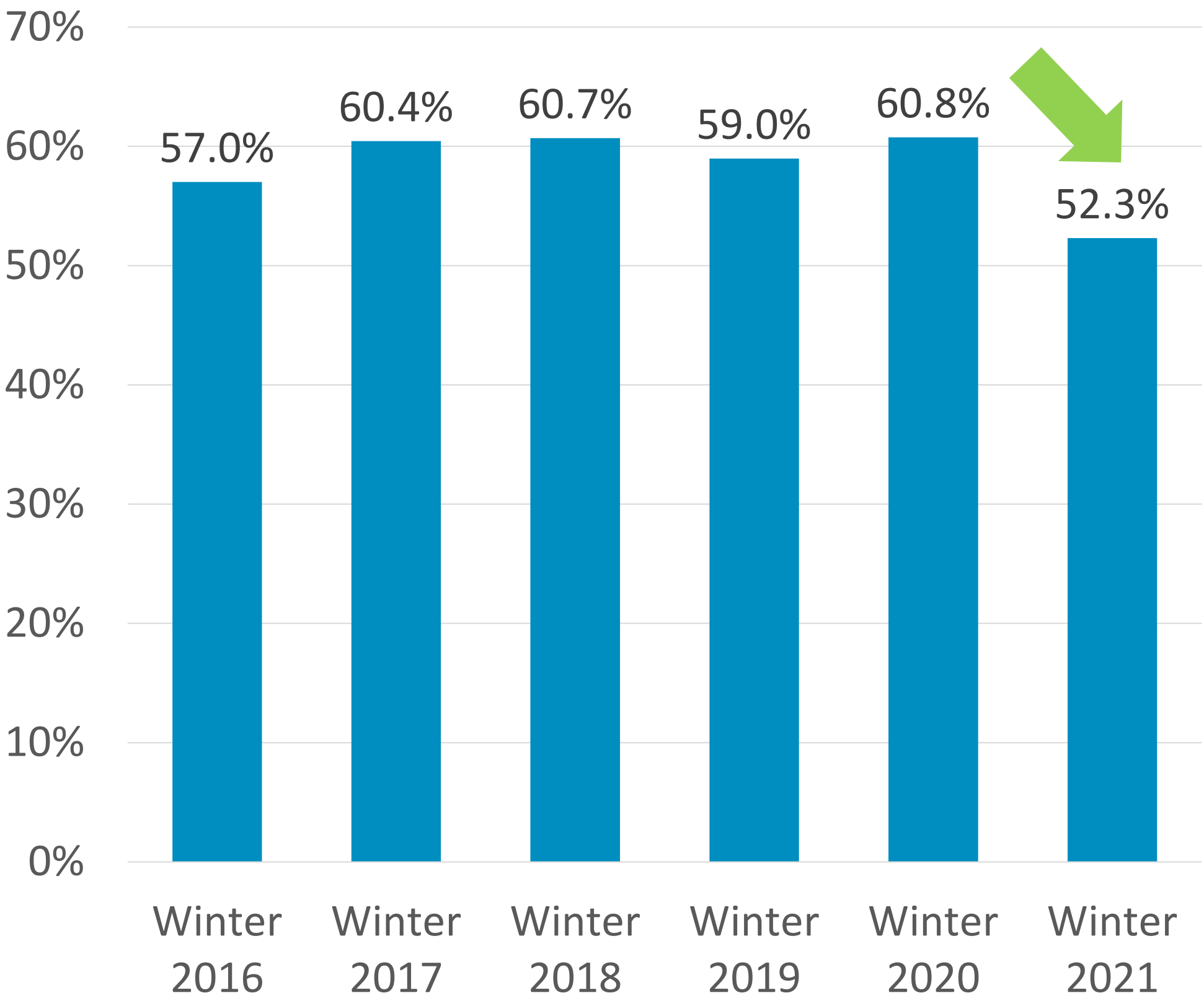
## Cities & Metropolitan Areas

Top 3 Box Score (8-10)



## Beach Destinations & Resorts

Top 3 Box Score (8-10)

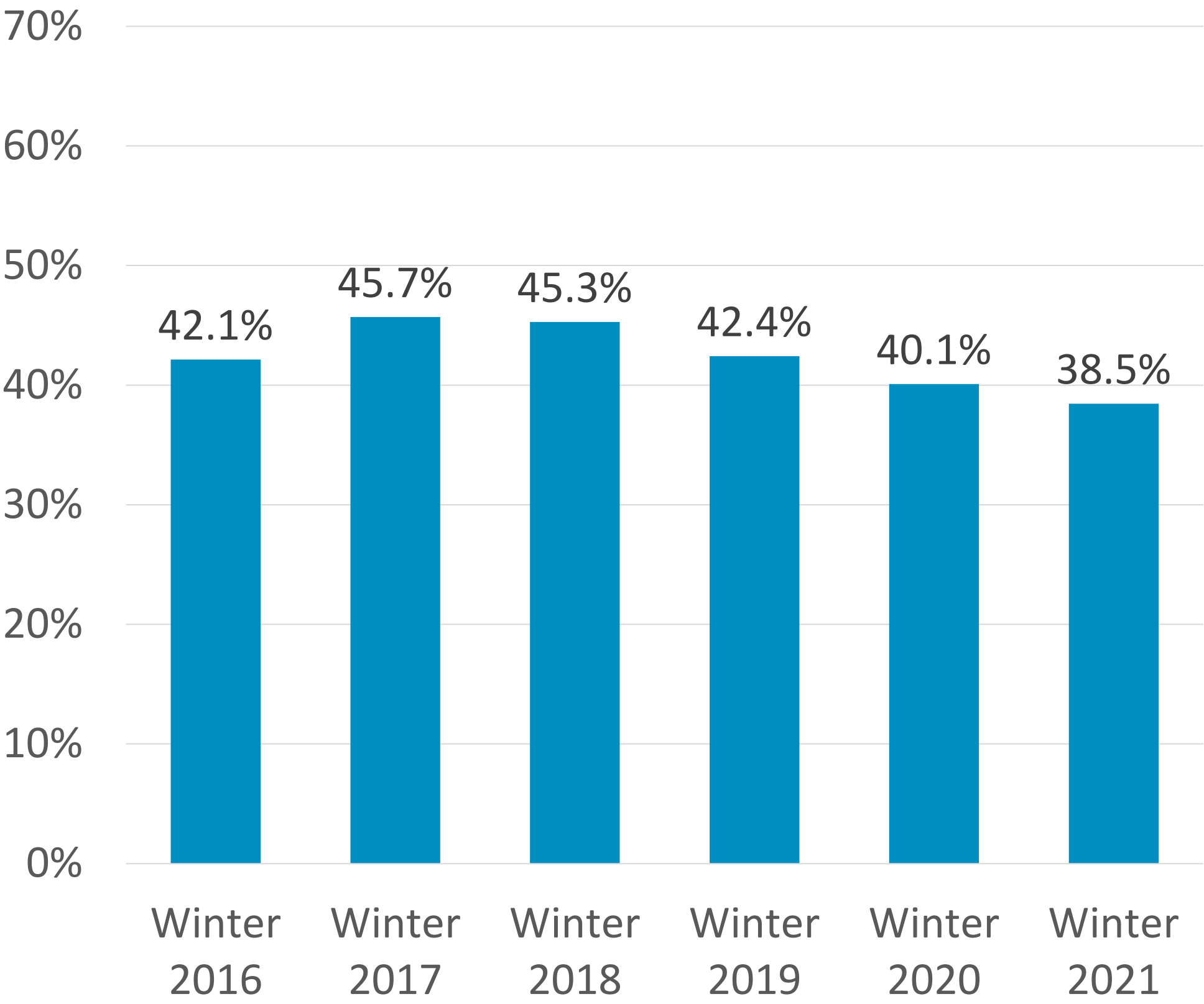




# DESTINATION EXCITEMENT

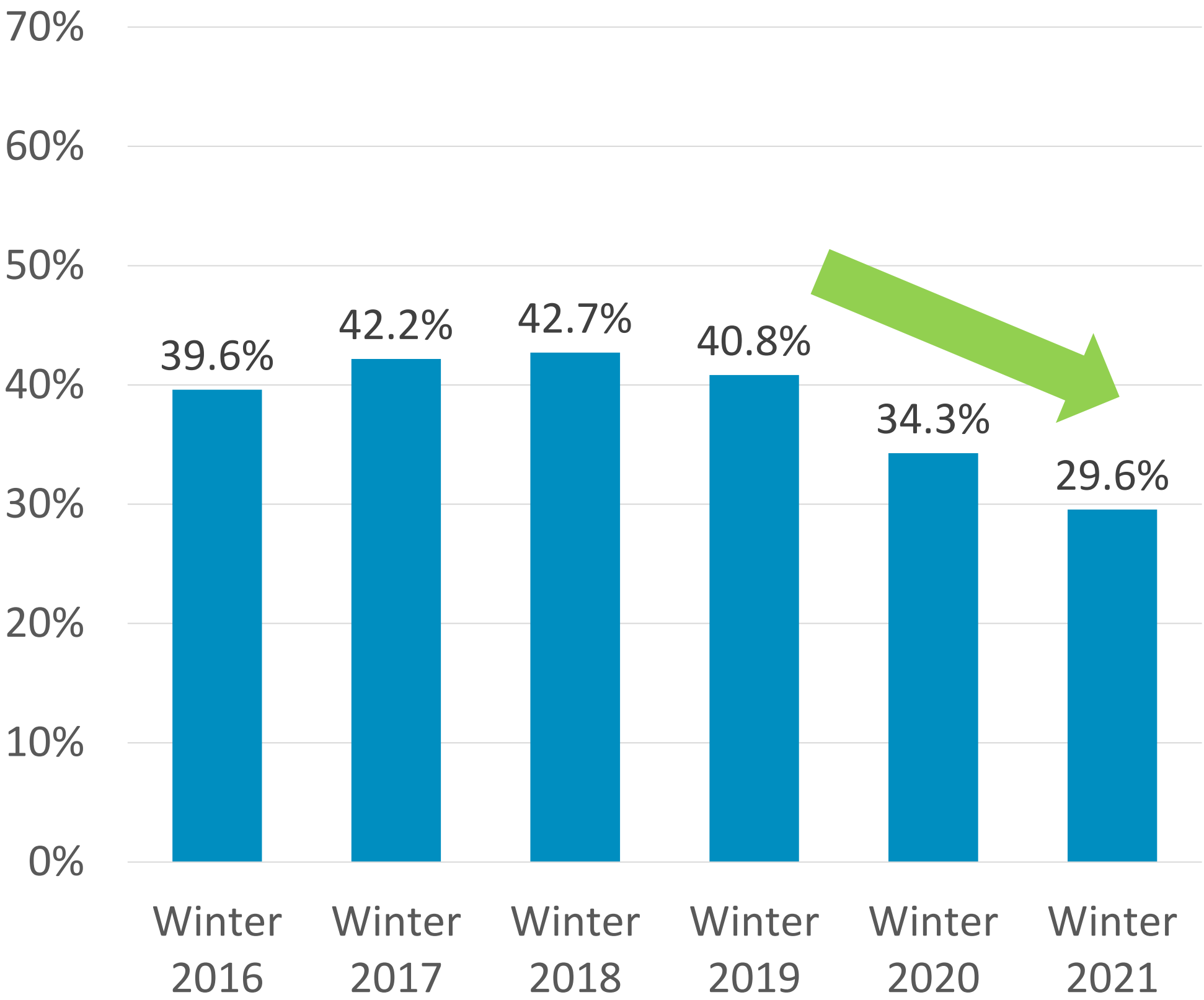
## Small towns, villages or rural destinations/attractions

Top 3 Box Score (8-10)



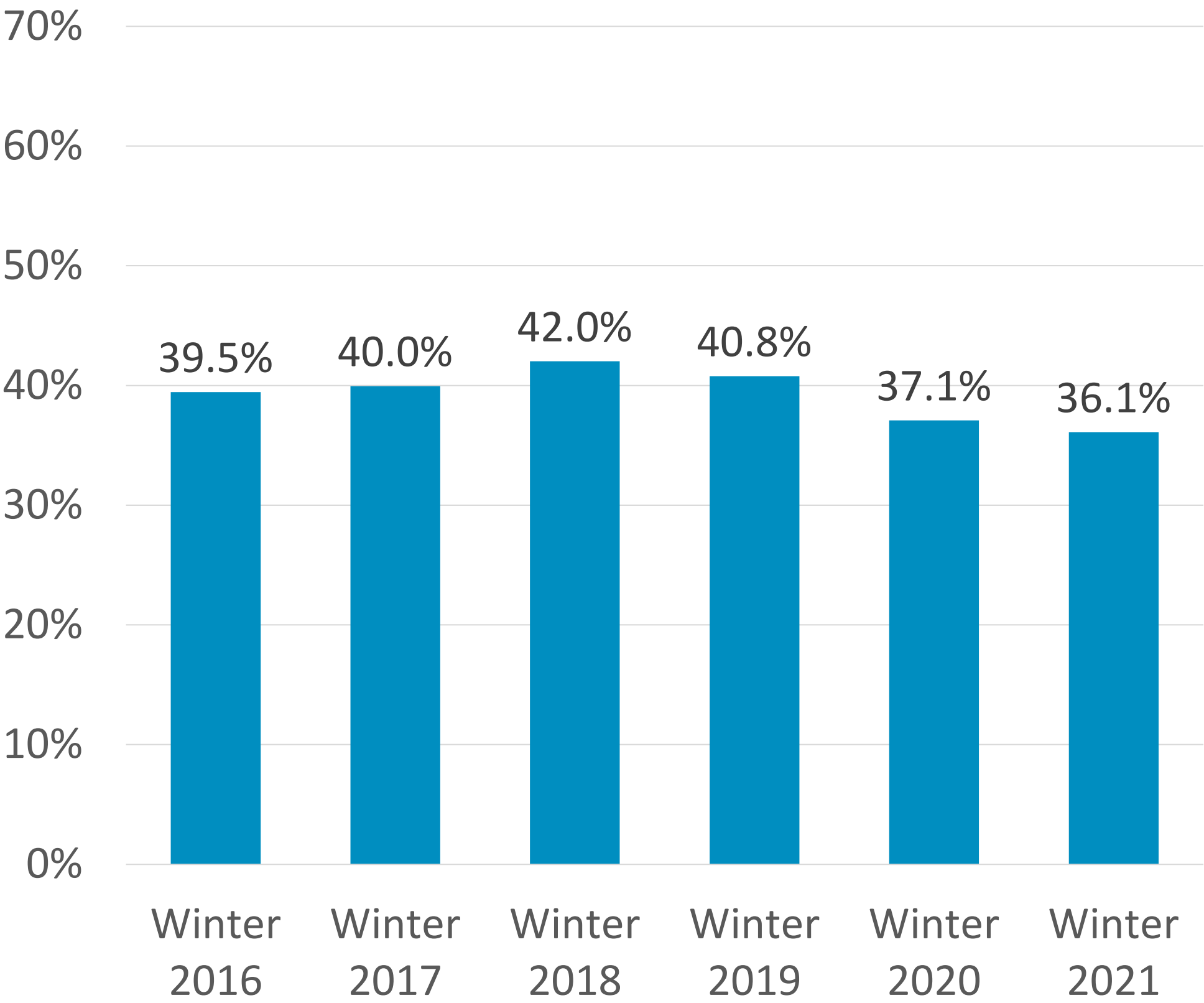
## Theme Parks

Top 3 Box Score (8-10)



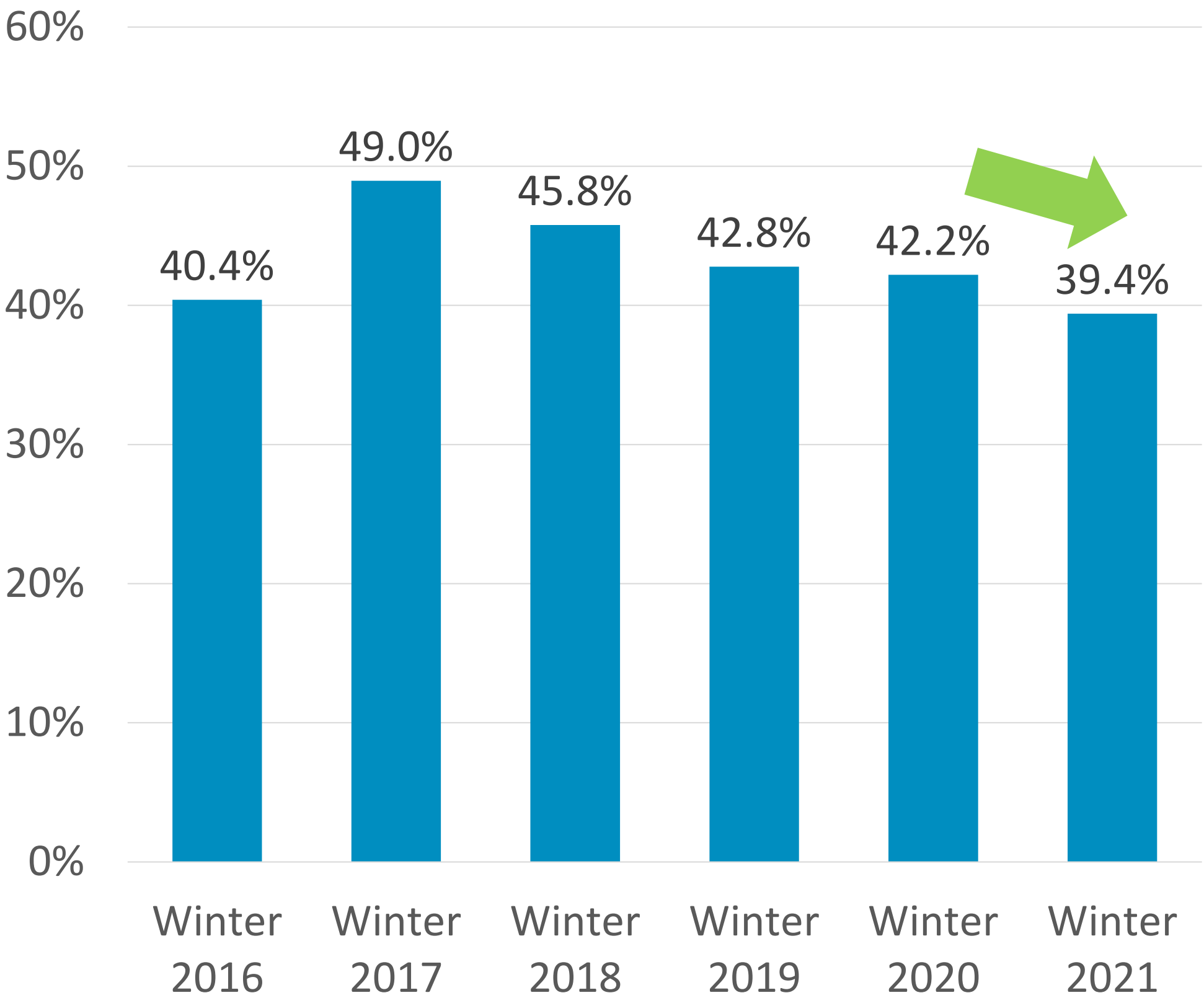
## Mountain Destinations & Resorts

Top 3 Box Score (8-10)



## U.S. National Parks

Top 3 Box Score (8-10)

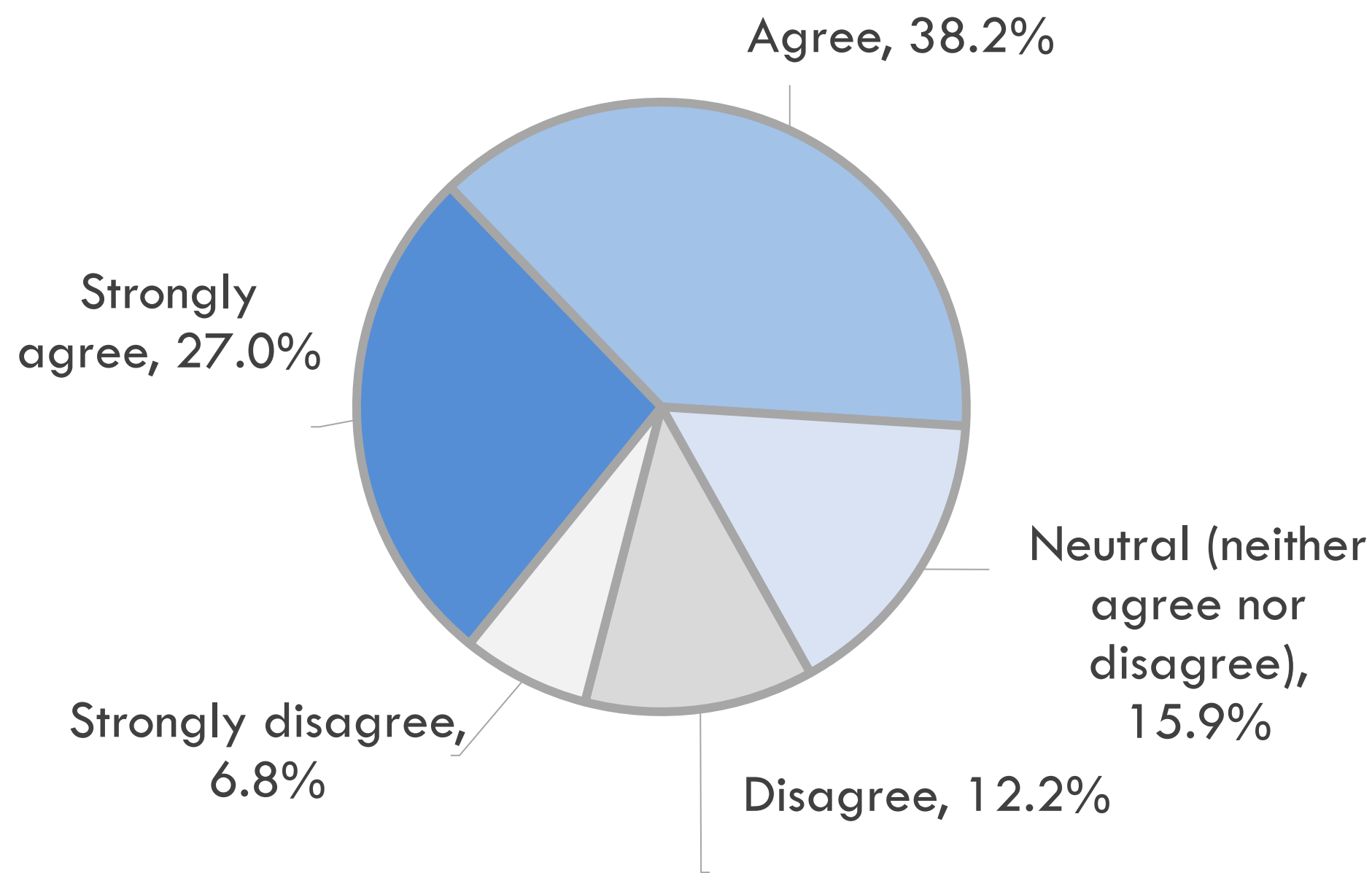




# INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW

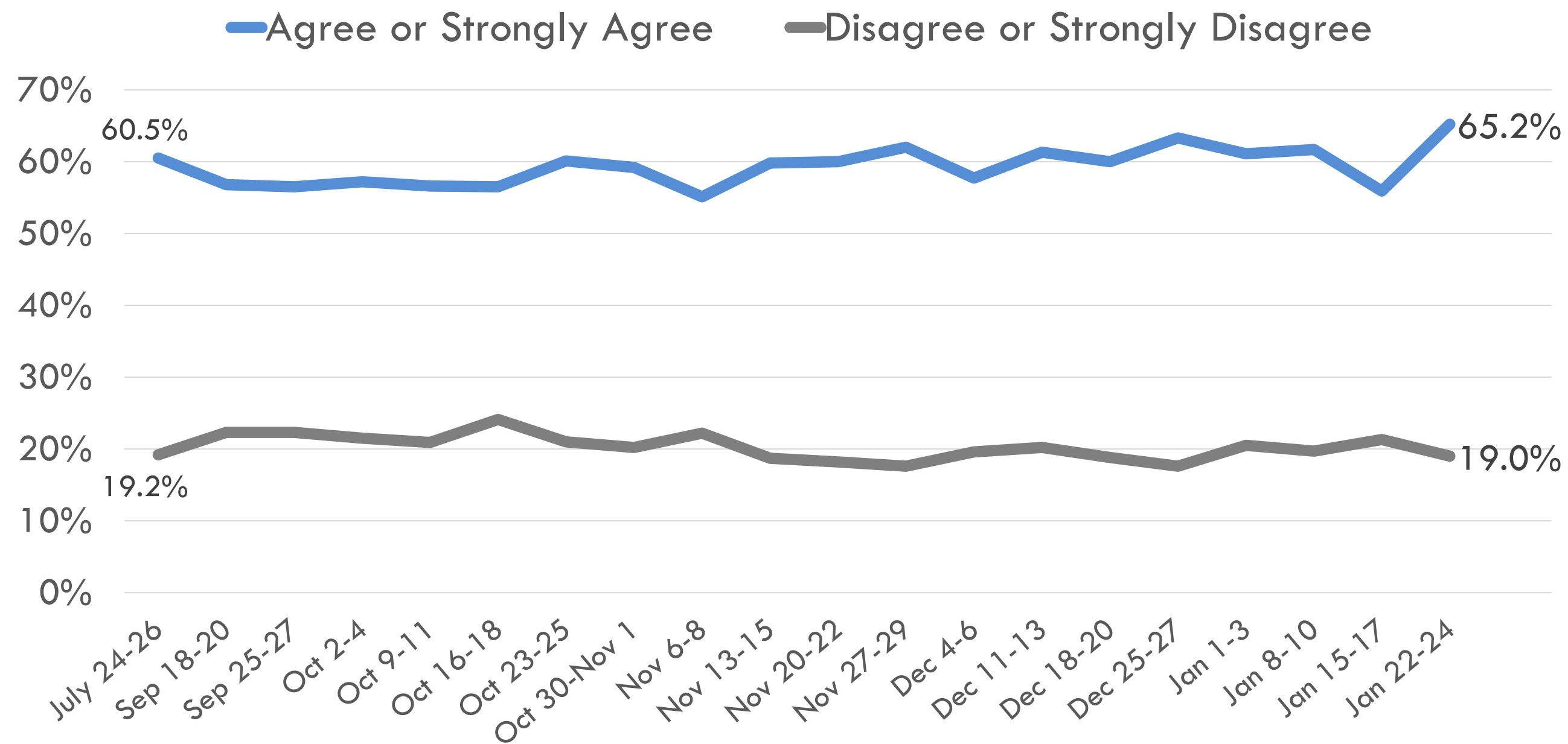
How much do you agree with the following statement?

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



(Base: Base: Coronavirus Travel Sentiment Survey, Destination Analysts, Inc. Waves 20, 28-46 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 and 1,206 completed surveys.)

## Historical data







# DESIRED EXPEREINCES

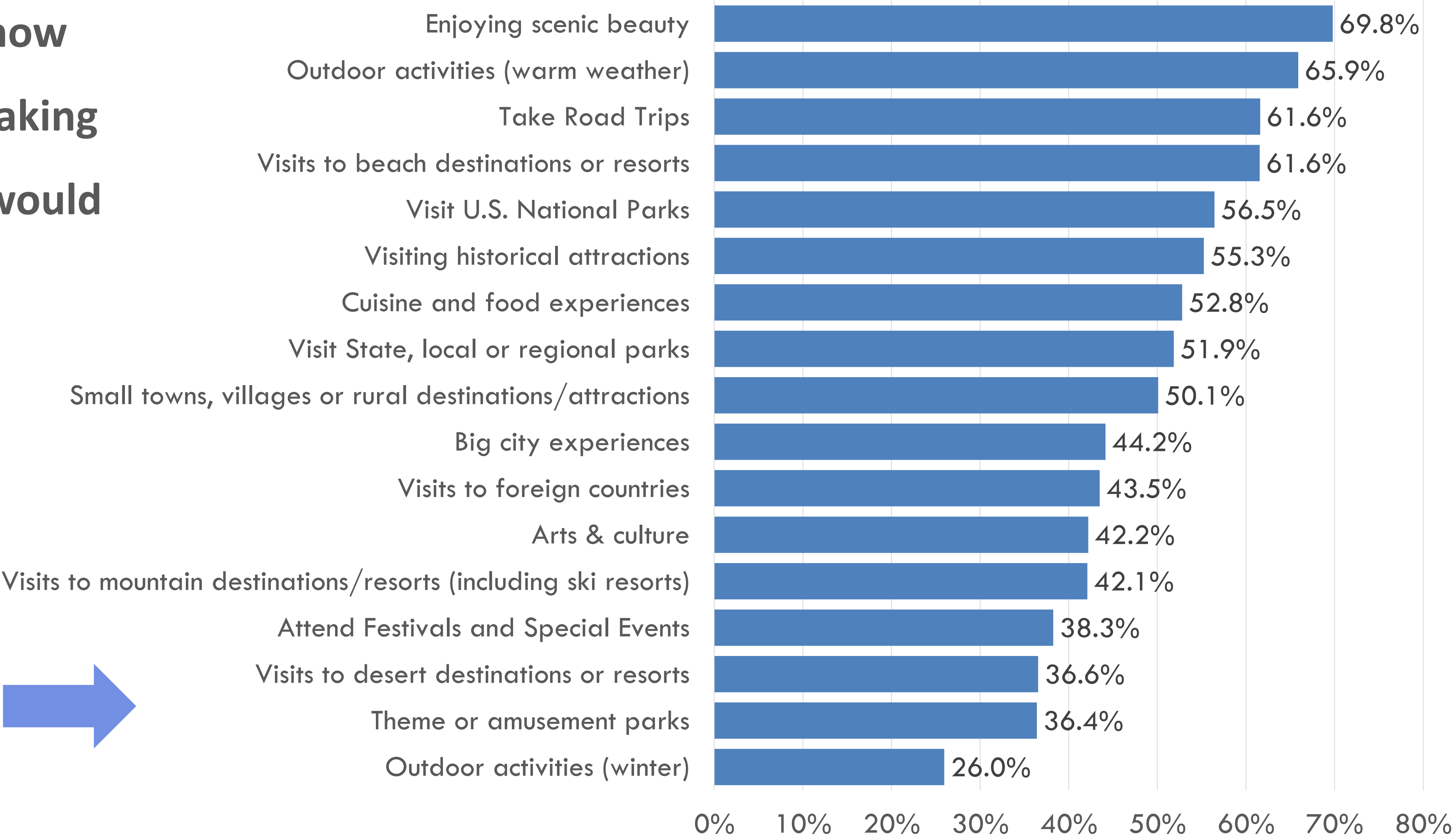
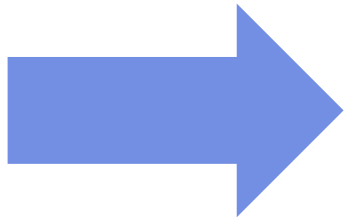
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# INTEREST IN TRIP EXPERIENCES

**Question:** In general, how interested are you in taking **LEISURE TRIPS** which would include the following:

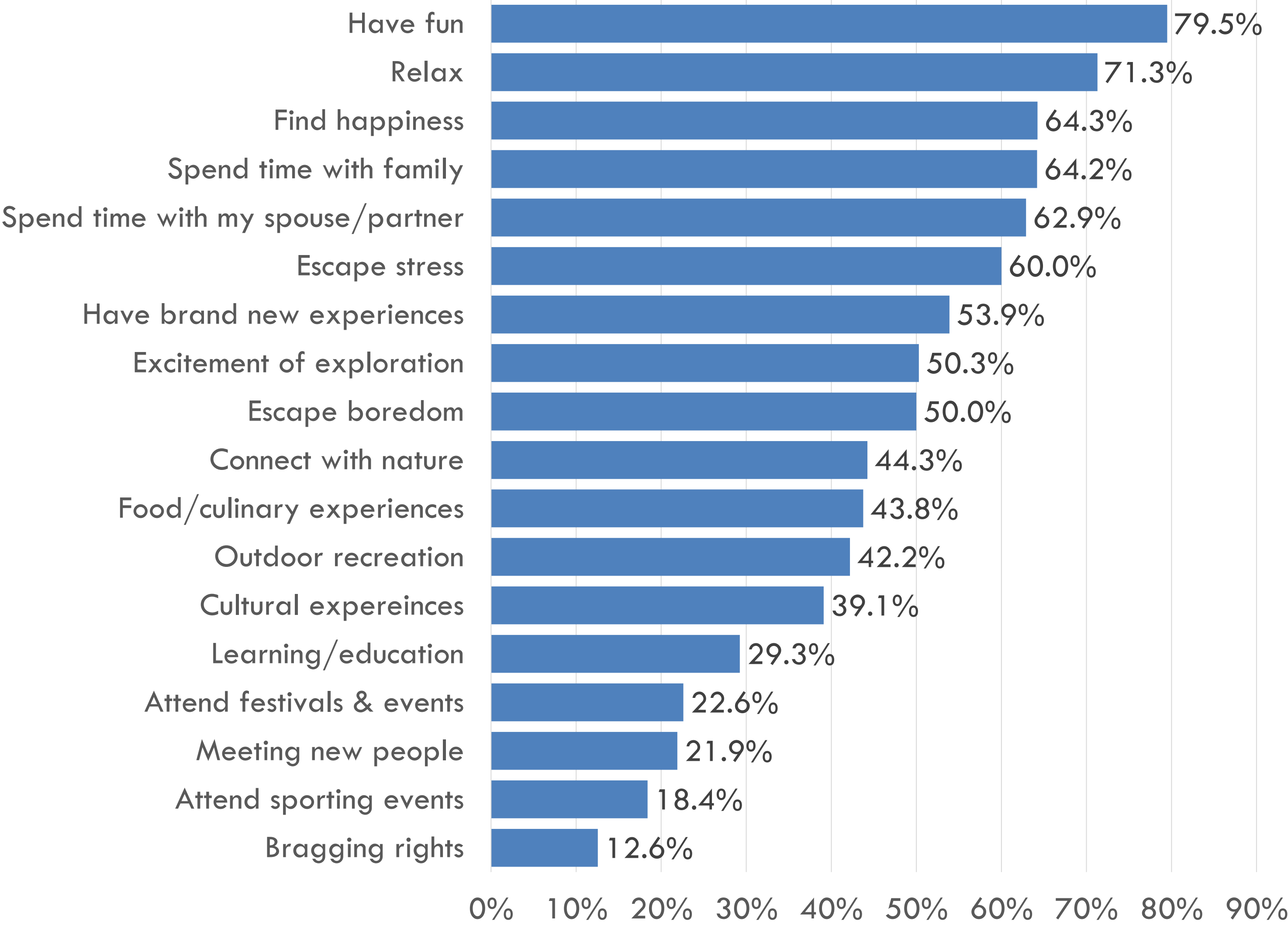
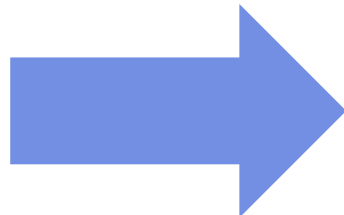
**INTERESTED OR VERY INTERESTED**



# INTEREST IN TRIP EXPERIENCES

**Question:** Tell us about your  
**TYPICAL PRIORITIES** when  
traveling for leisure. However  
you personally define each, use  
the scale provided to indicate  
how important each is to you  
when traveling for leisure.

**HIGH IMPORTANCE  
OR CRITICAL  
IMPORTANCE**

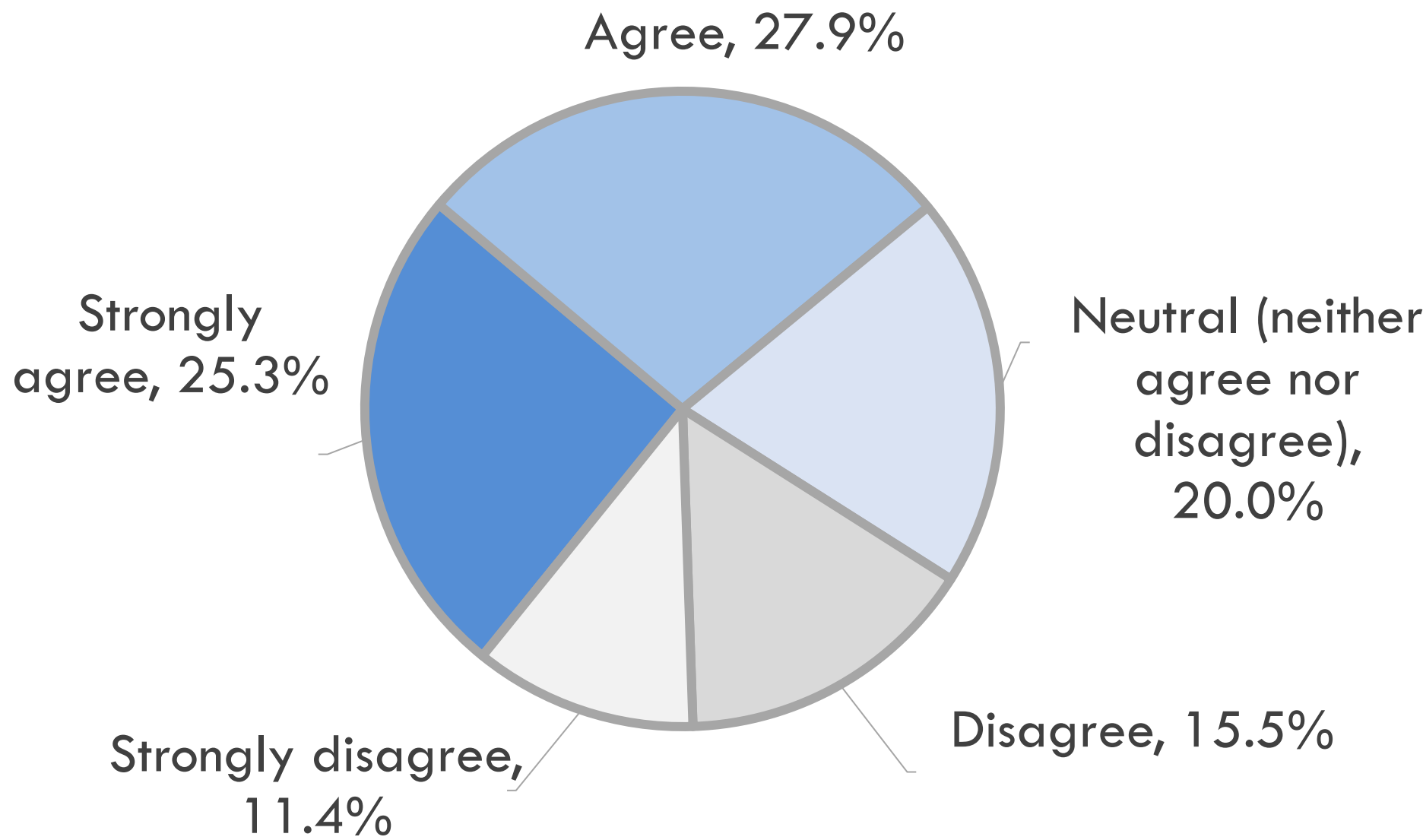




# TRAVEL GUILT

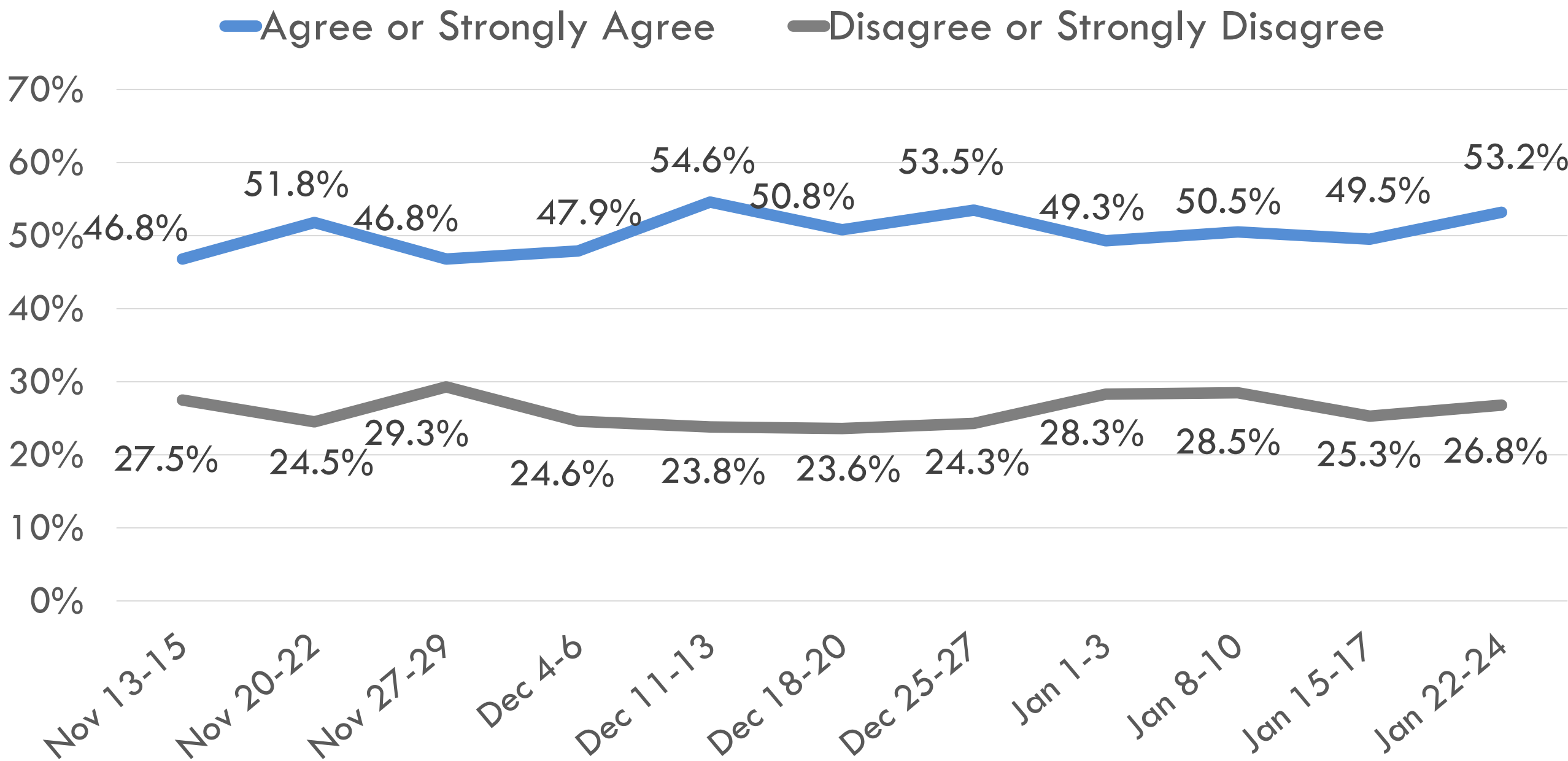
How much do you agree with the following statement?

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



(Base: Waves 36-46 data. All respondents, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205 and 1,206 completed surveys.)

Historical data





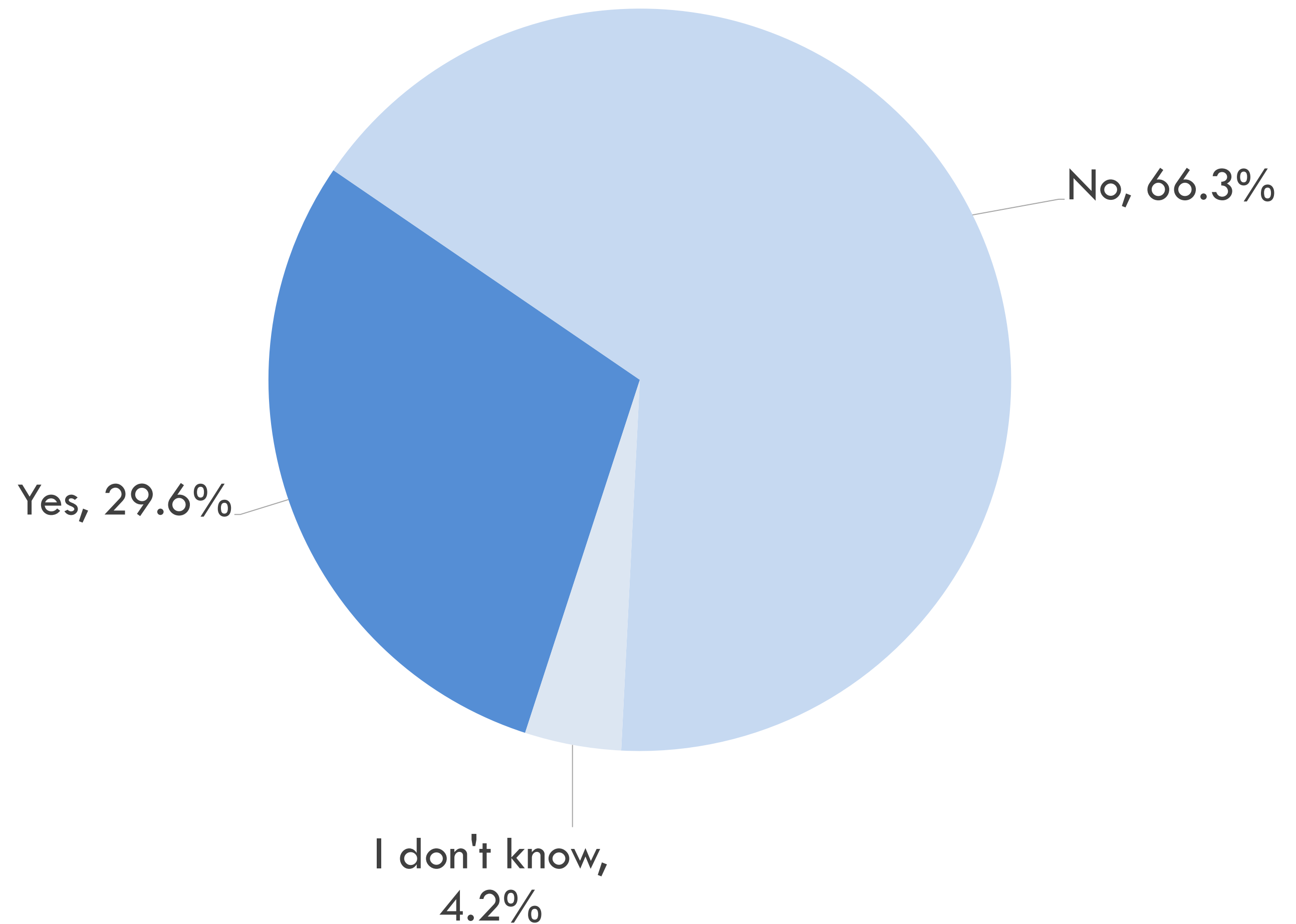
# Travel Planning Resources



# USE OF ONLINE VIDEO IN TRAVEL PLANNING

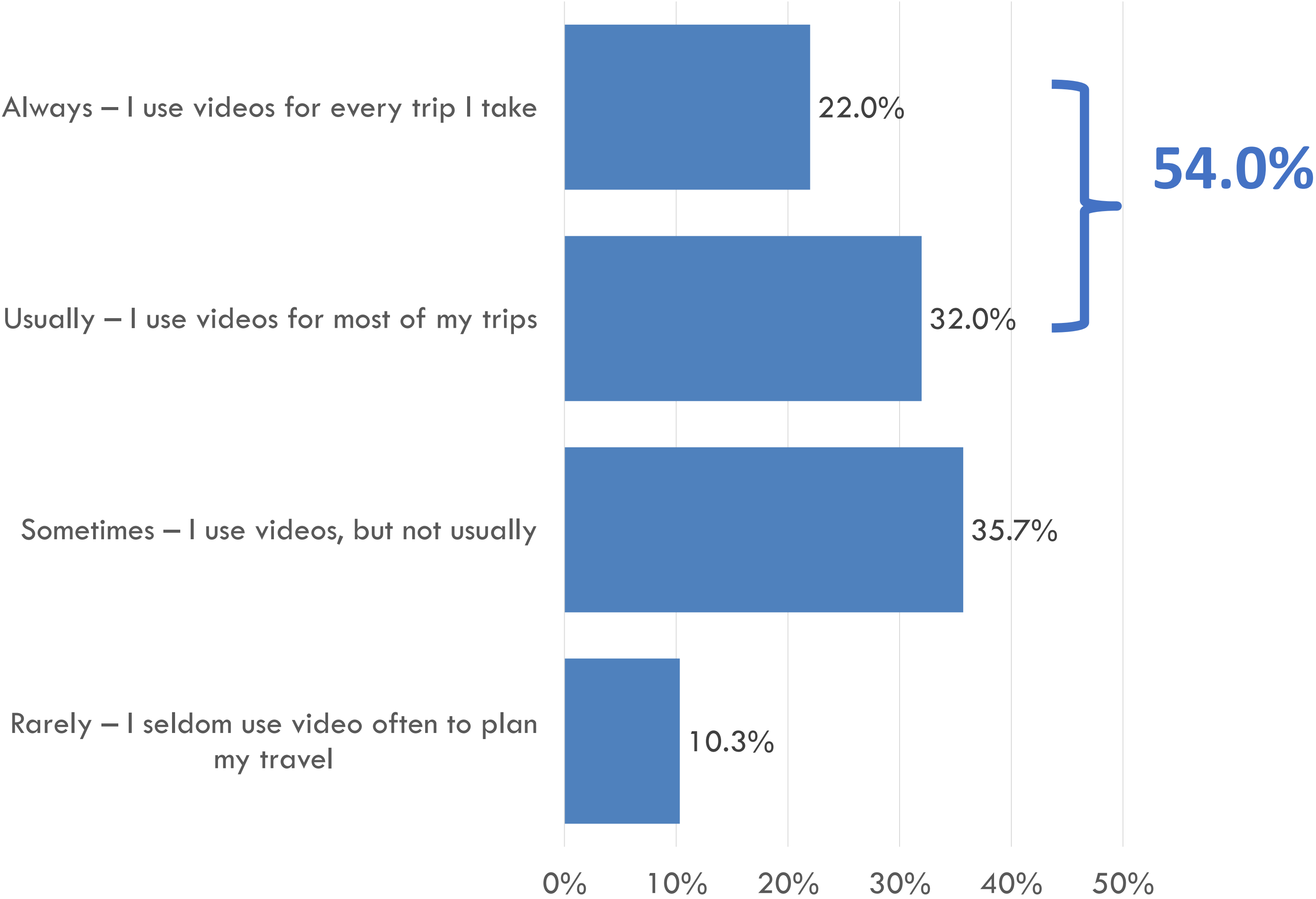
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**Question:** In the PAST TWO (2) YEARS, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video or Google Video) to plan any of your leisure trips?



# FREQUENCY OF VIDEO USE IN TRAVEL PLANNING

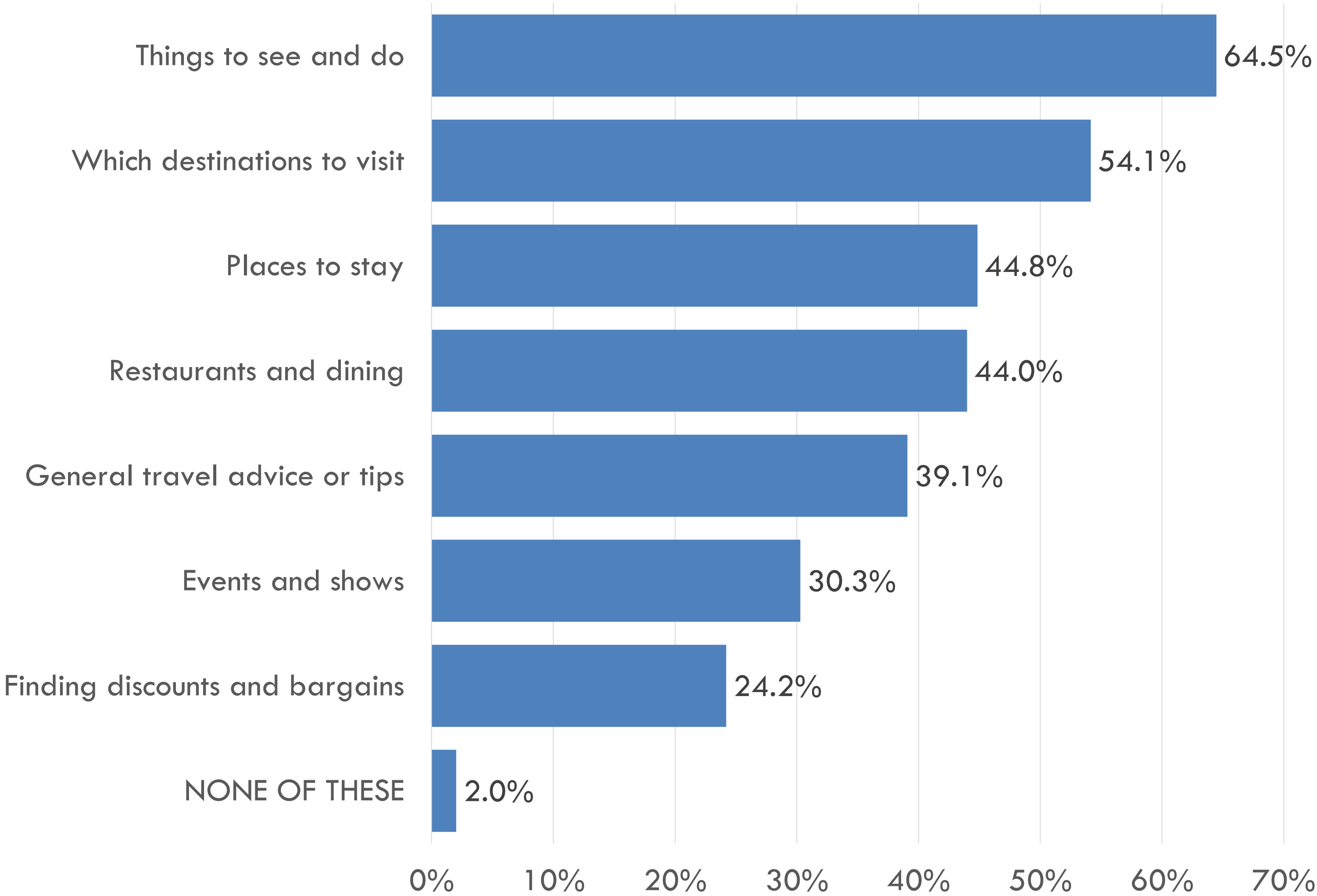
**Question:** How often do you use **ONLINE VIDEOS** to plan your leisure trip?  
(Select one)





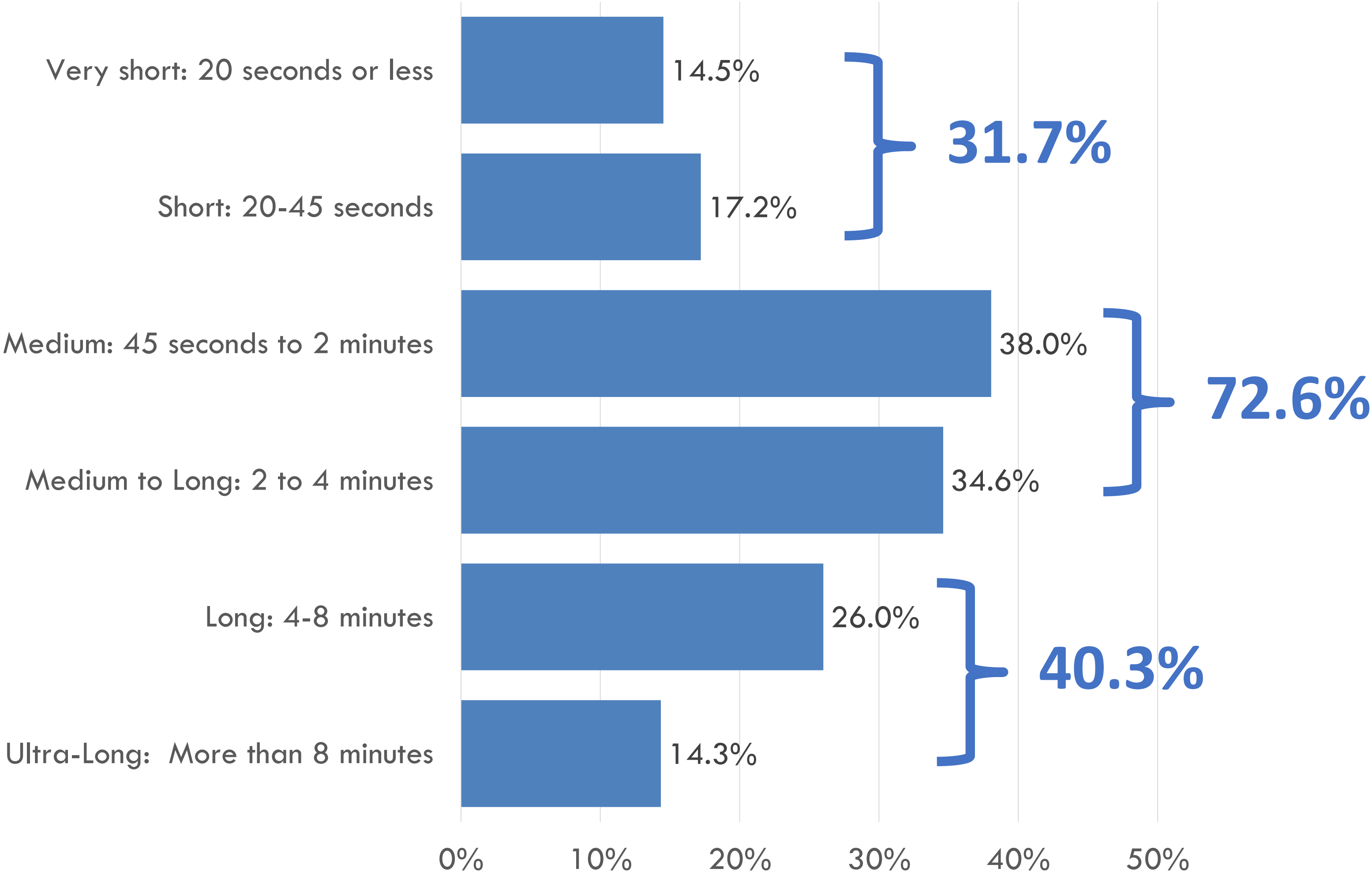
# TRAVEL PLANNING TASKS DONE WITH ONLINE VIDEO

**Question:** In the PAST TWO (2) YEARS, which of these travel tasks have use used ONLINE VIDEO to help with? (Select all that apply)



# LENGTH OF TRAVEL VIDEOS USED

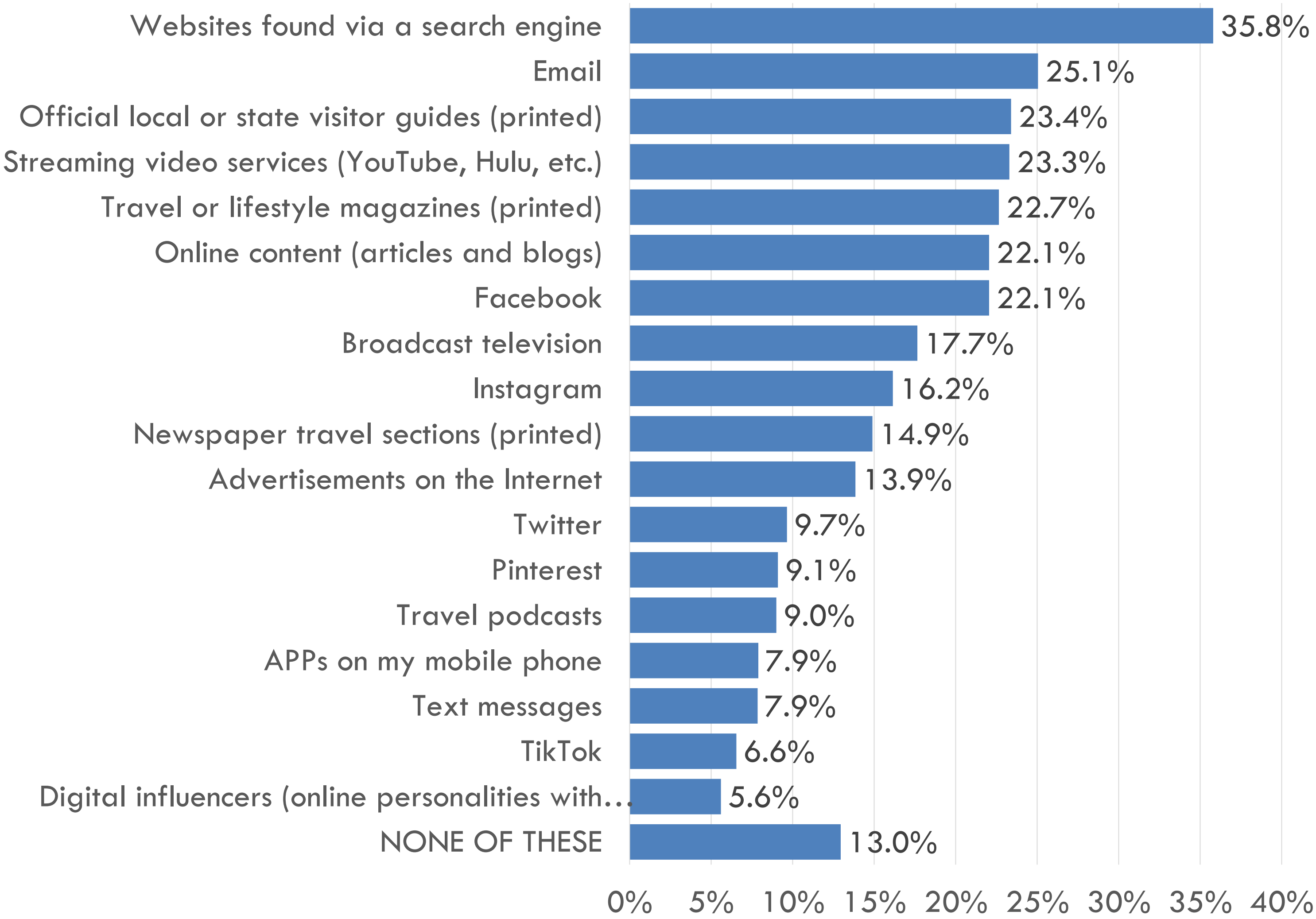
**Question:** Thinking of travel videos that influenced the above decision(s) – what length were these videos?  
(Select all that apply)





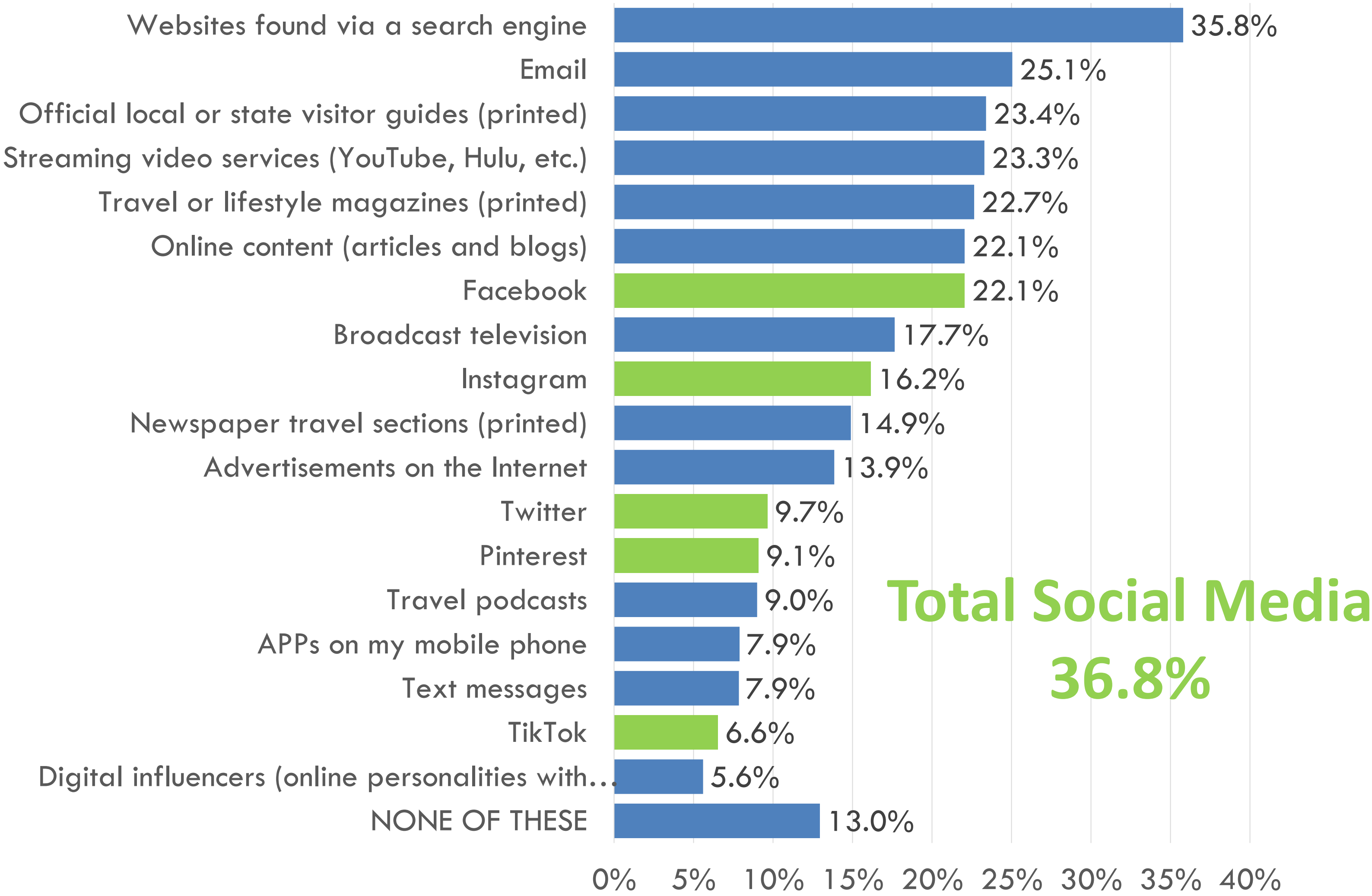
# RECEPTIVITY TO MARKETING CHANNELS

**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)



# RECEPTIVITY TO MARKETING CHANNELS

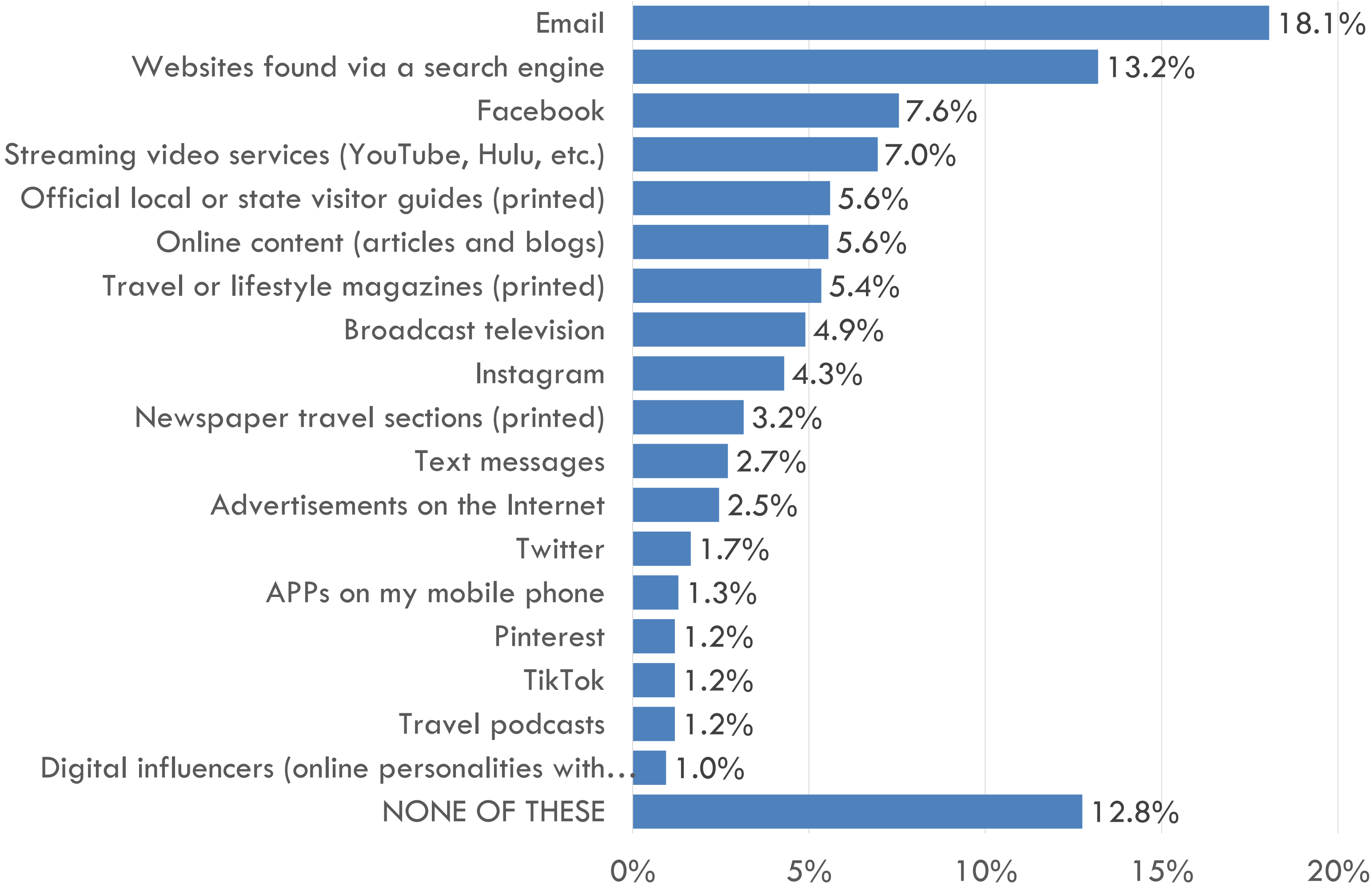
**Question:** Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)





# SINGLE MOST RECEPTIVE CHANNEL

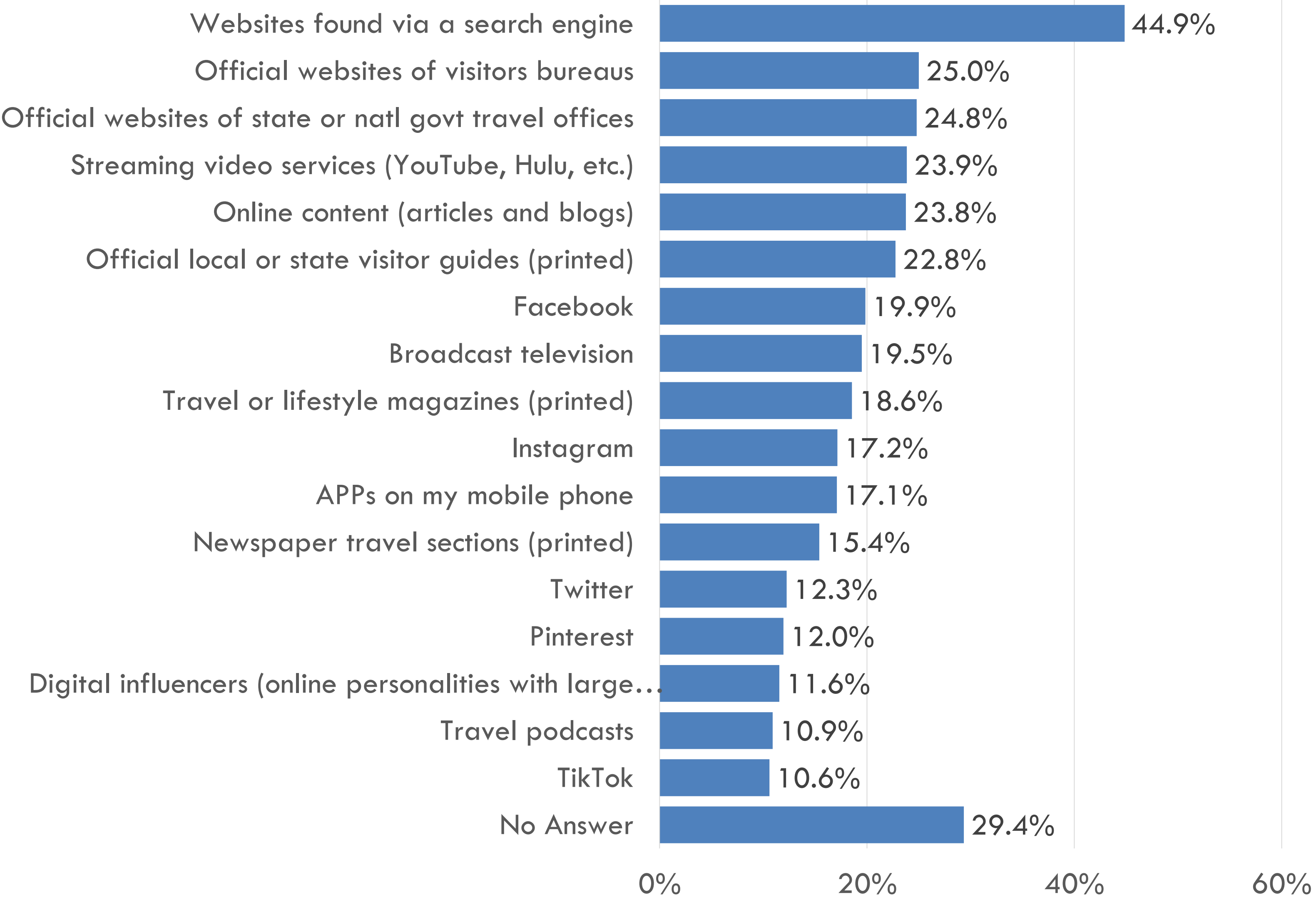
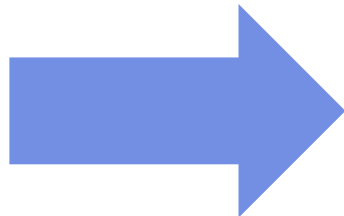
Question: Which would be the SINGLE BEST WAY a travel destination could reach you right now? (Select one)



# FREQUENCY OF USE

**Question:** In general, when planning your travel which best describes how often you use each of the following?

**ALWAYS OR  
FREQUENTLY USE**

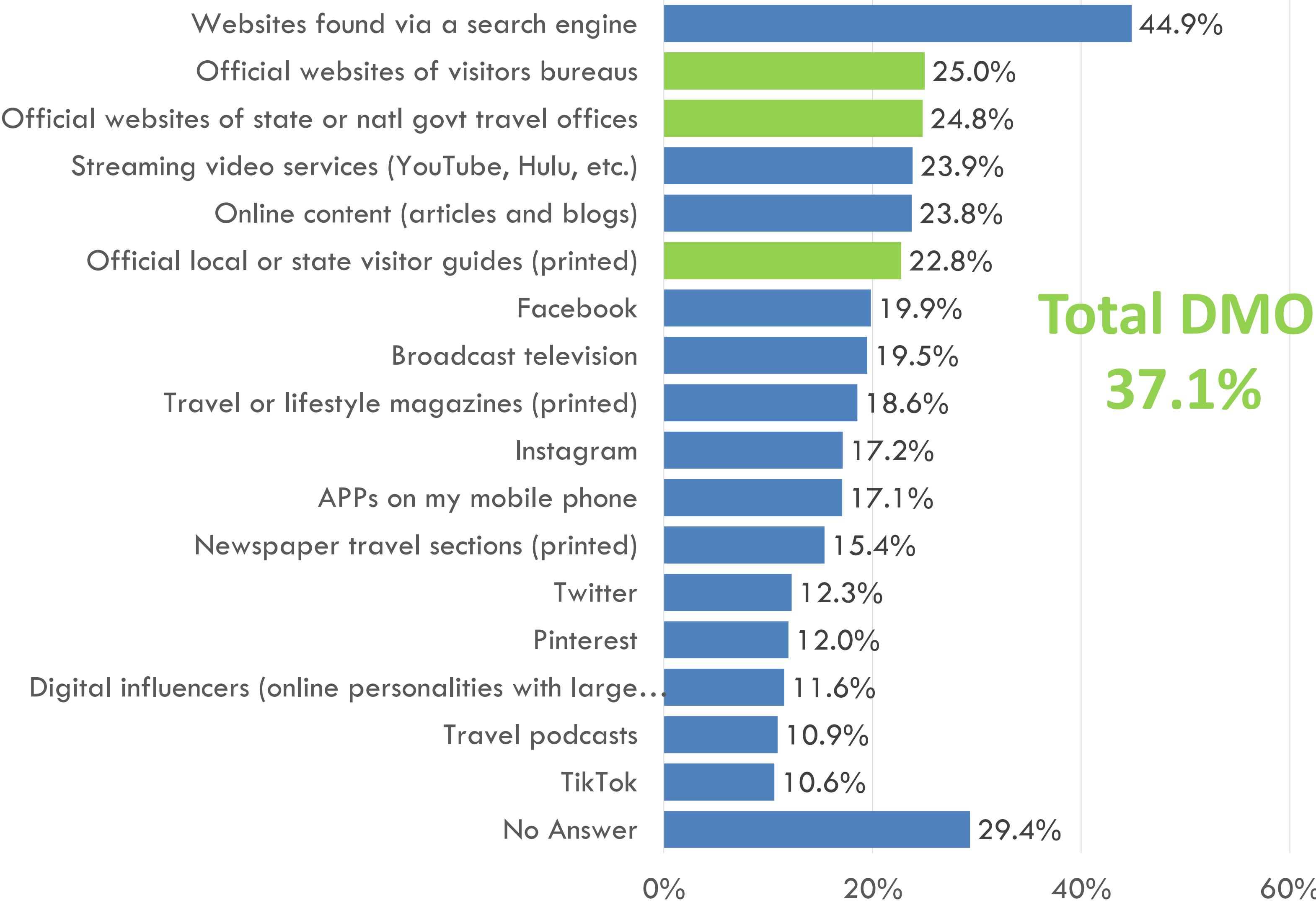
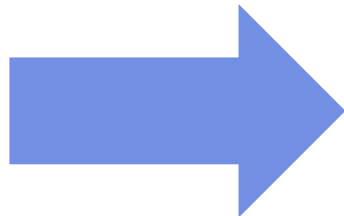




# FREQUENCY OF USE

**Question:** In general, when planning your travel which best describes how often you use each of the following?

**ALWAYS OR  
FREQUENTLY USE**





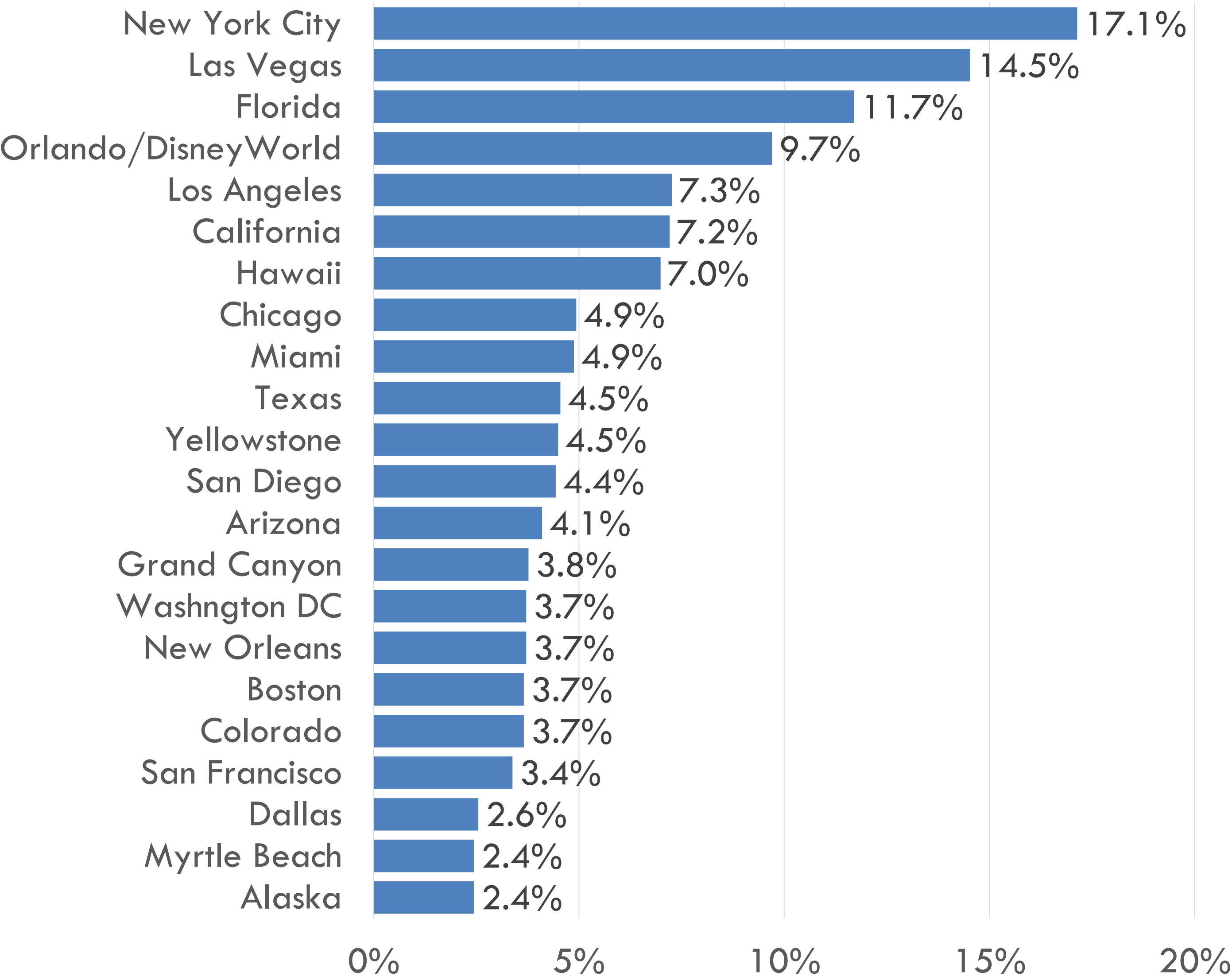
# TRAVEL ASPIRATIONS, 2021





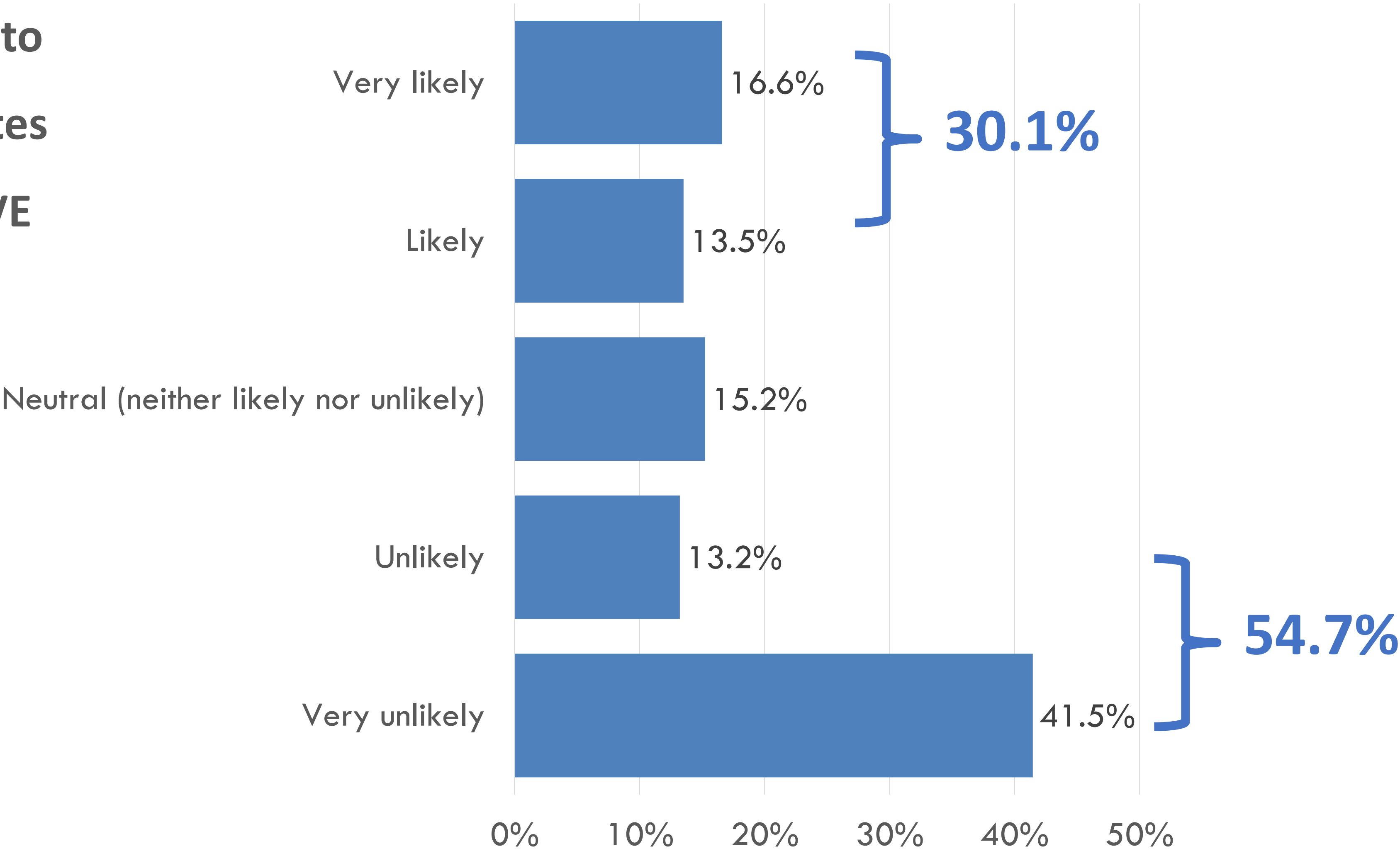
# MOST DESIRED DOMESTIC DESTINATIONS

**Question:** What are the five domestic destinations that you would most like to visit in the upcoming year? (Write in up to five)



# INTERNATIONAL ASPIRATIONS: NEXT 12 MONTHS

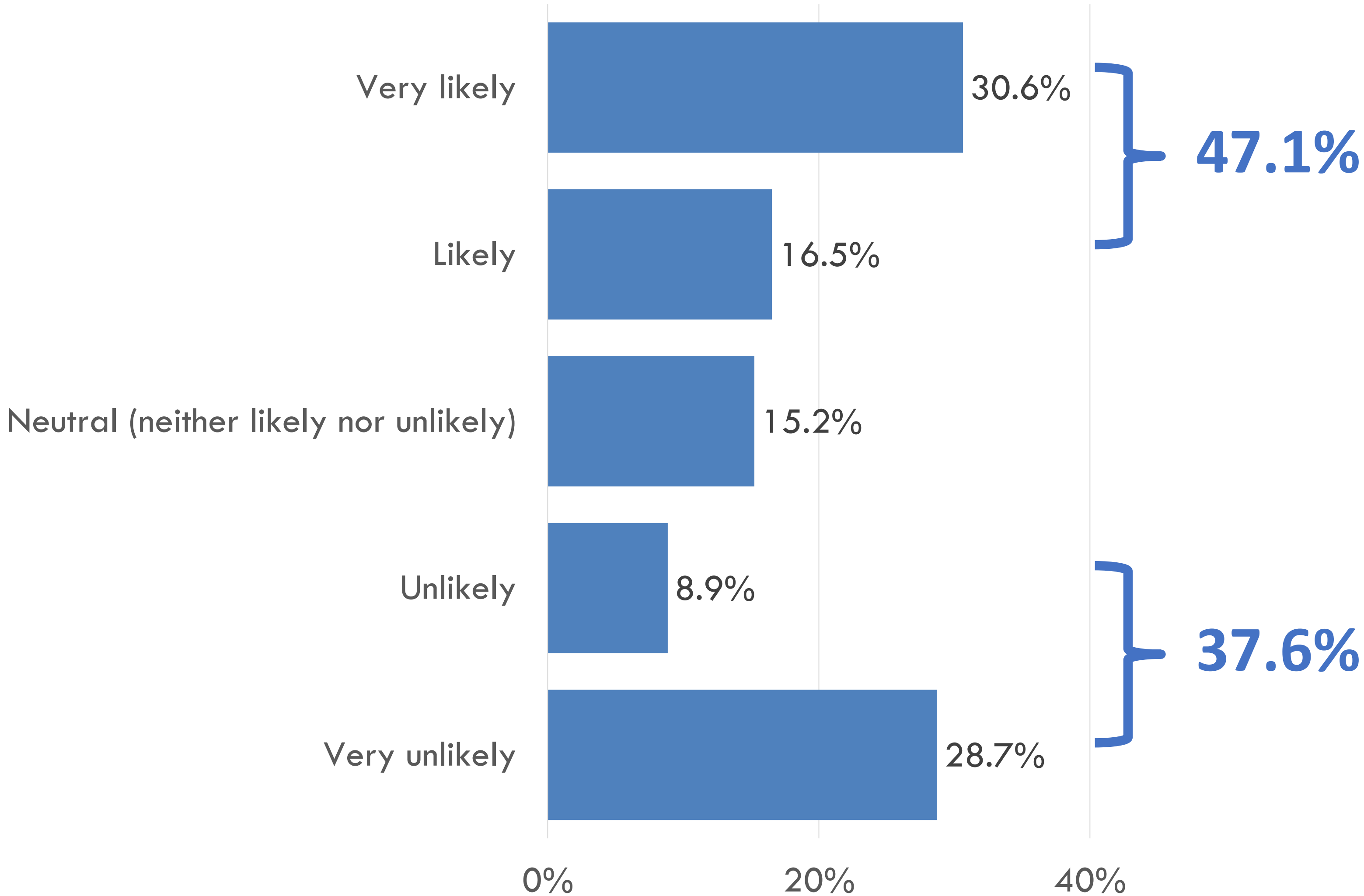
**Question:** How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?





# INTERNATIONAL ASPIRATIONS: NEXT 3 YEARS

**Question:** How likely are you to travel outside the United States for leisure in the NEXT THREE (3) YEARS?

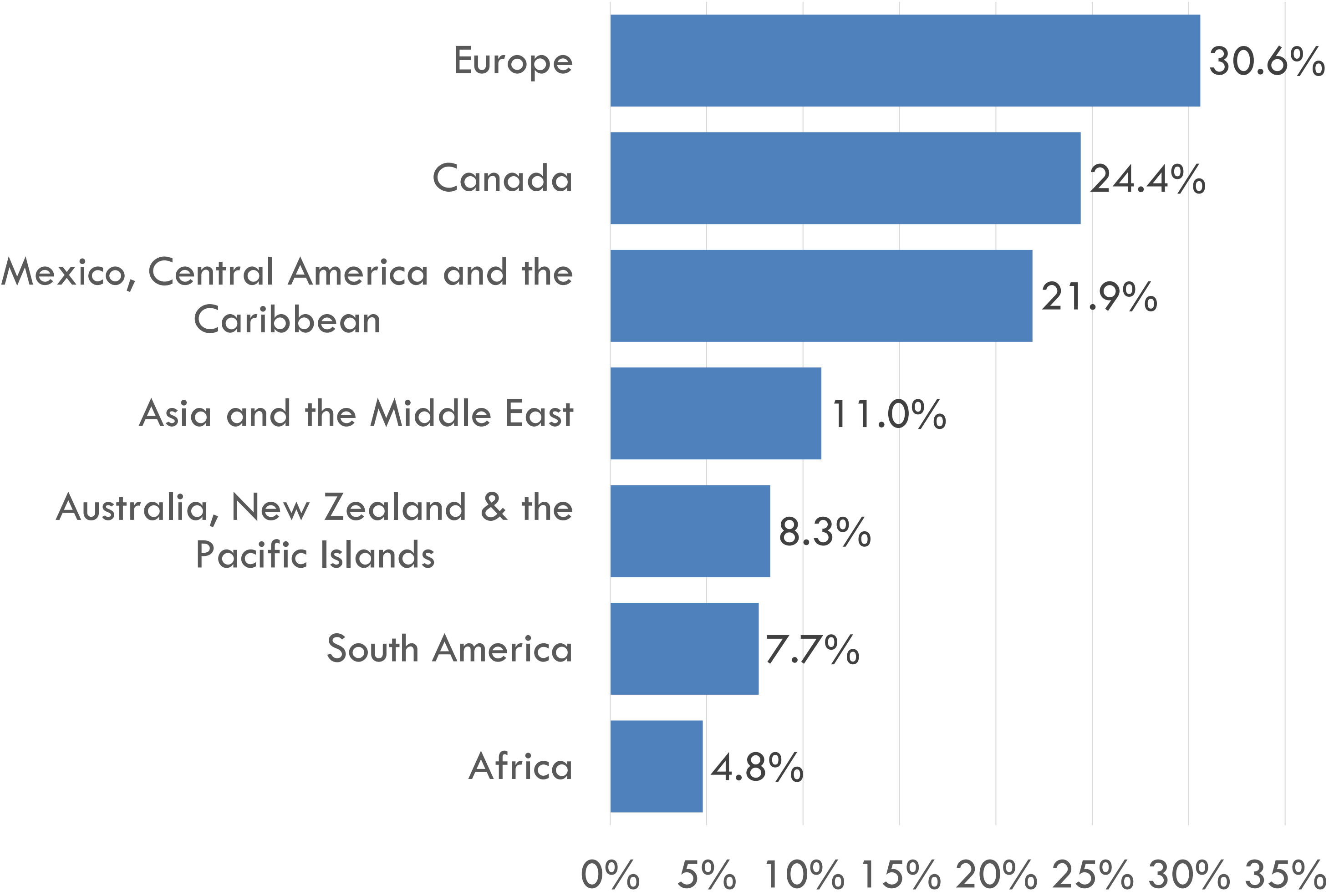






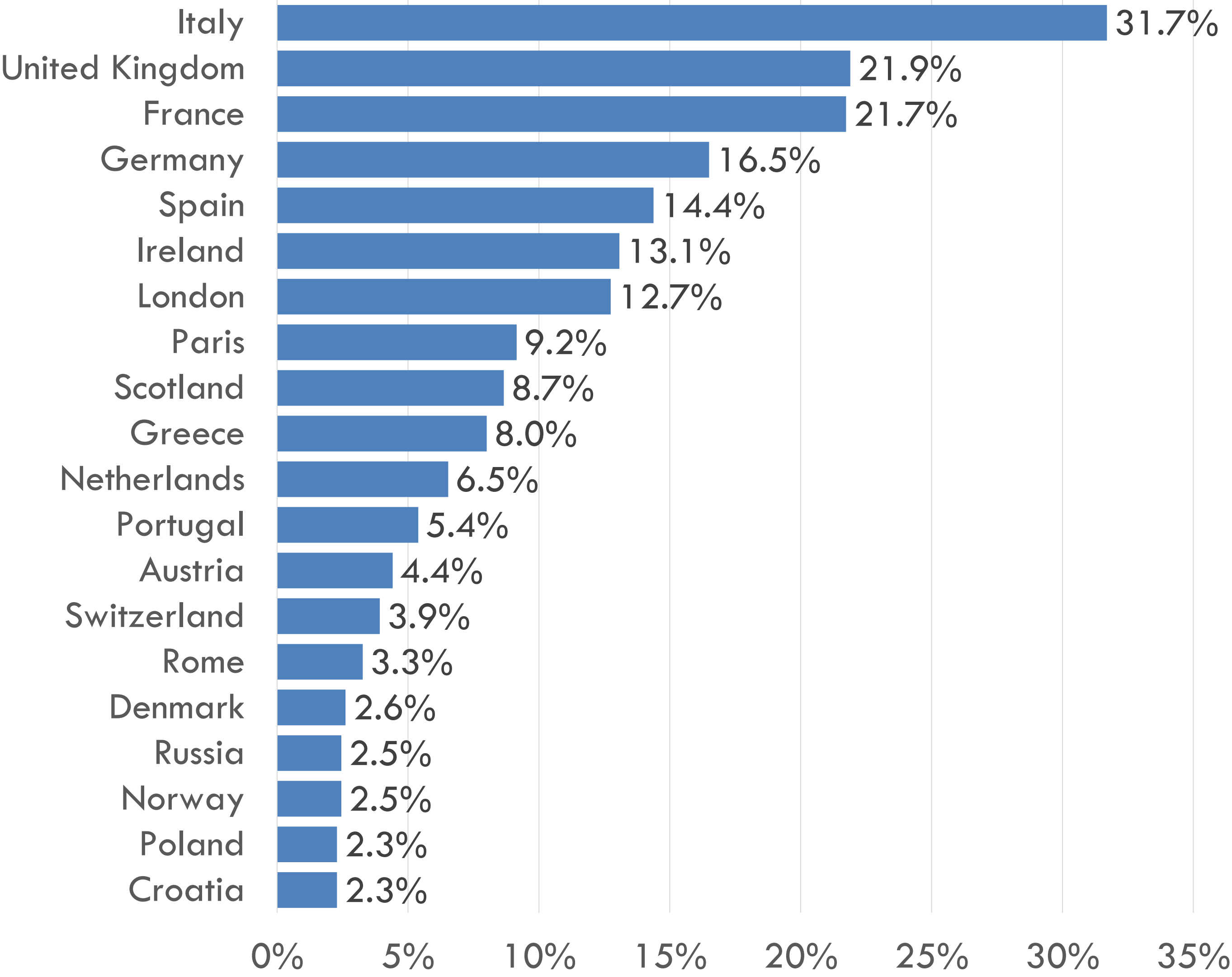
# INTERNATIONAL ASPIRATIONS: DESIRED REGIONS

**Question:** Which regions are you likely to visit in the NEXT THREE (3) YEARS?



# MOST DESIRED DESTINATIONS: EUROPE

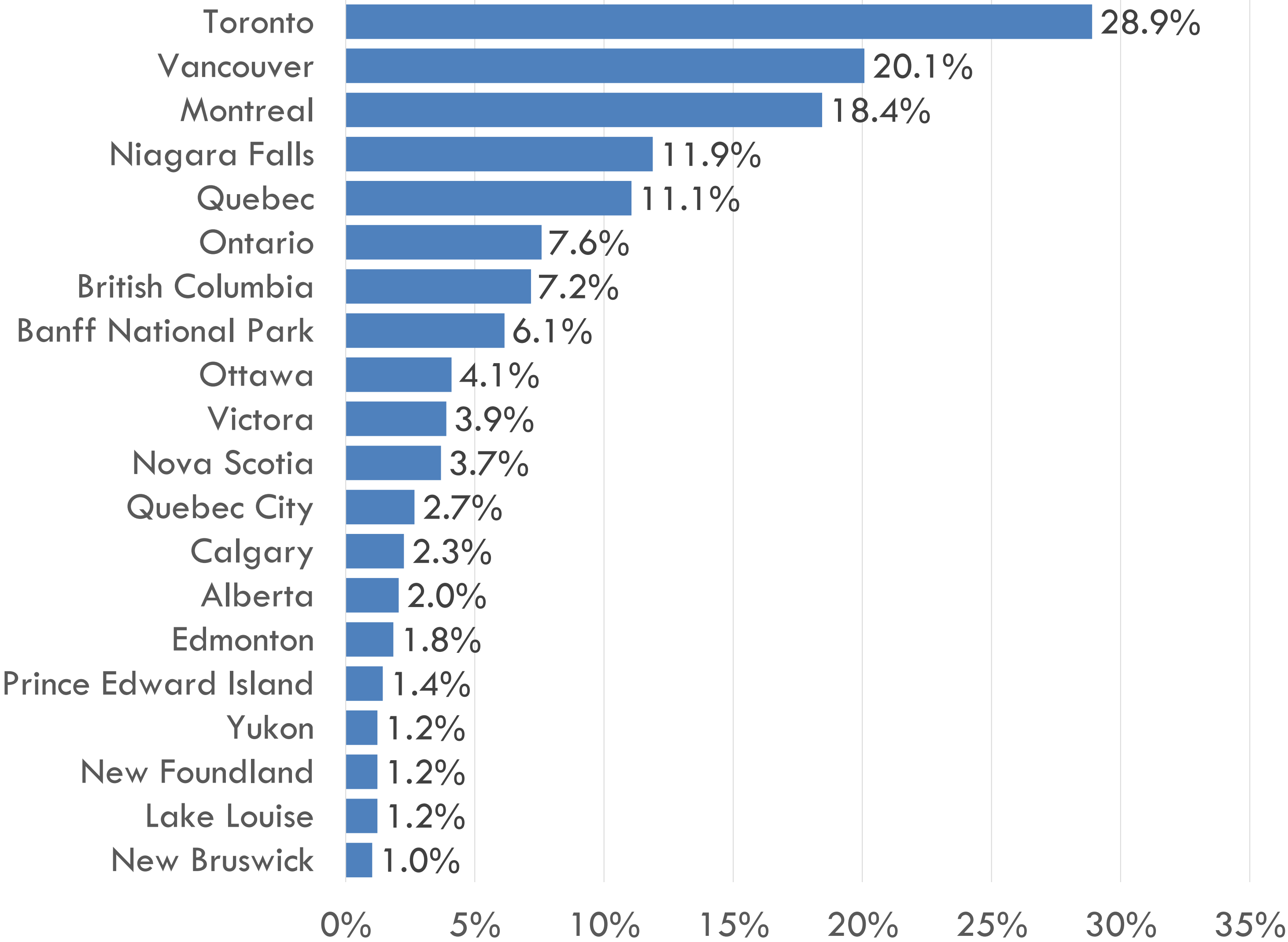
**Question:** What destinations (if any) in EUROPE would you most like to visit? (Write in as many as three)





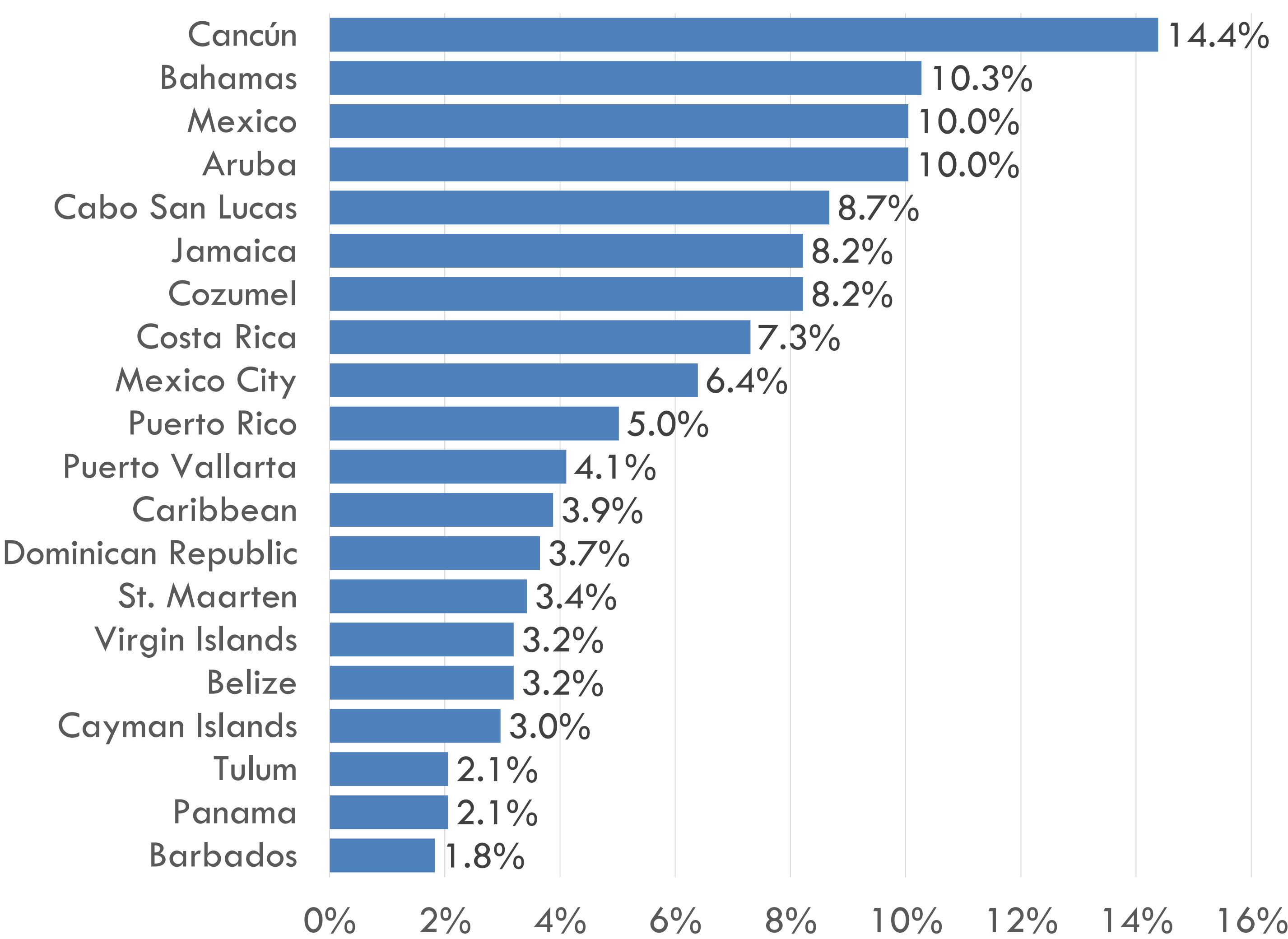
# MOST DESIRED DESTINATIONS: CANADA

**Question:** What destinations (if any) in CANADA would you most like to visit? (Write in as many as three)



# MOST DESIRED DESTINATIONS: MEXICO/CENTRAL AM/CARIBBEAN

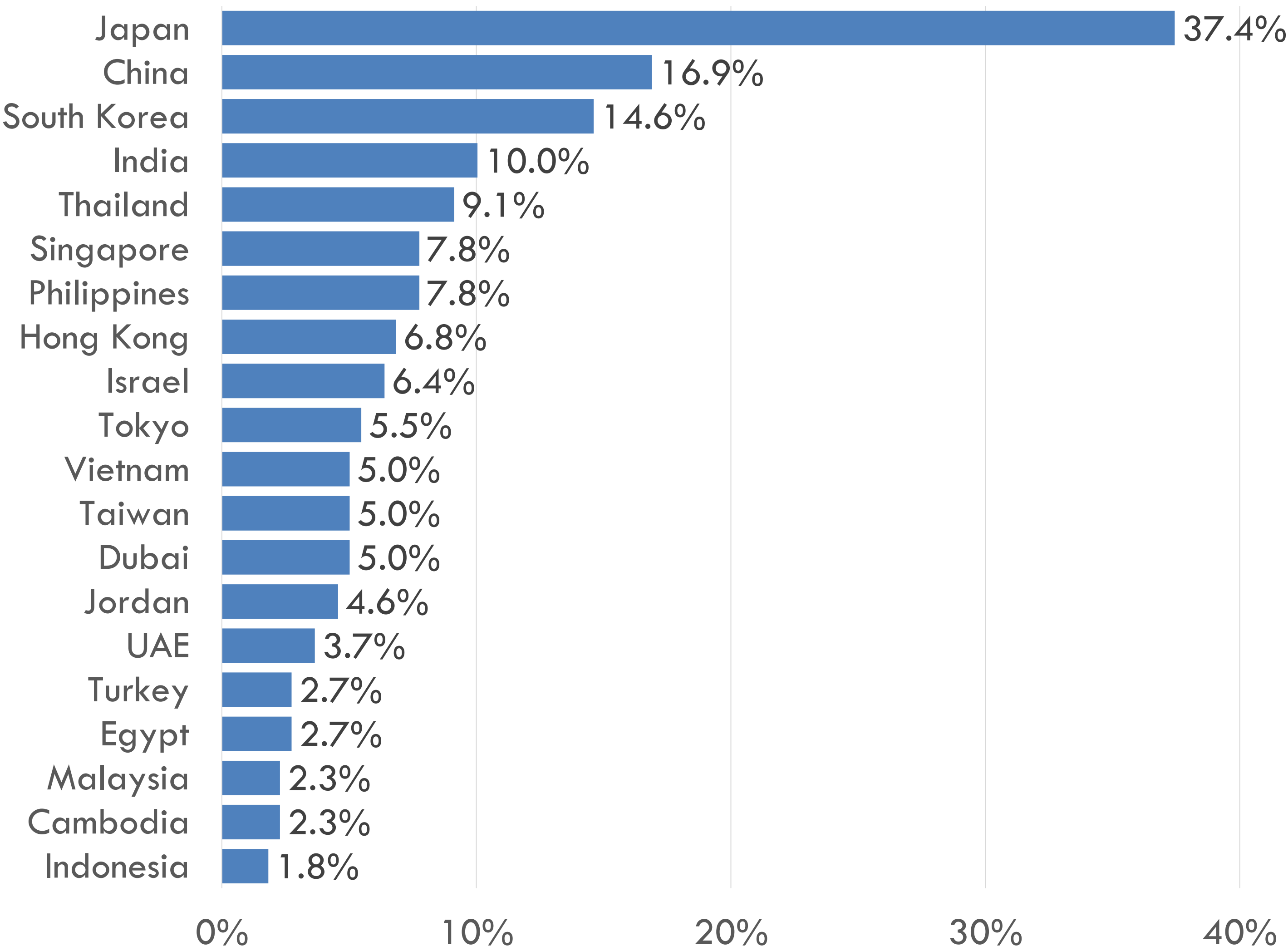
**Question:** What destinations (if any) in MEXICO, CENTRAL AMERICA & THE CARIBBEAN would you most like to visit? (Write in as many as three)





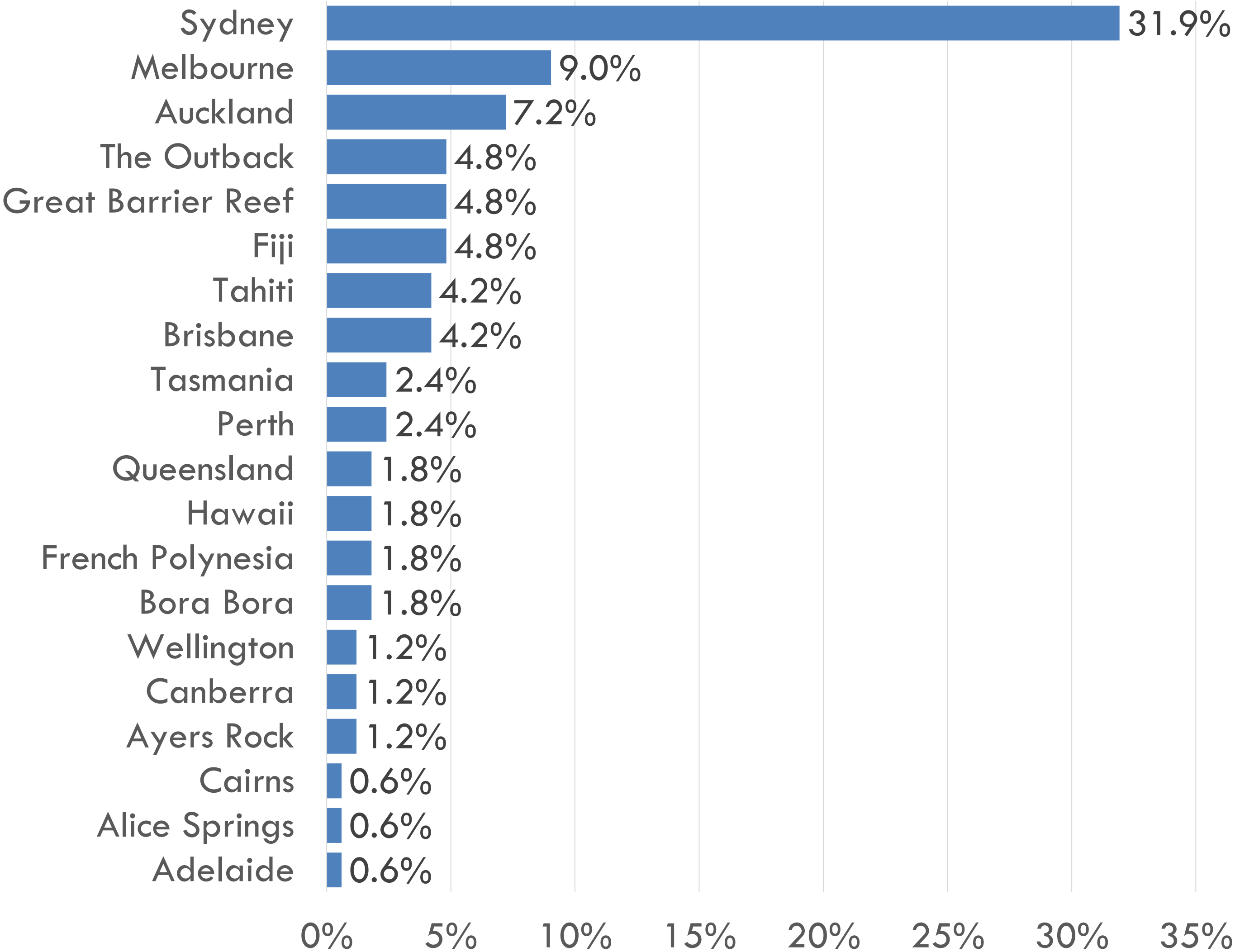
# MOST DESIRED DESTINATIONS: ASIA & THE MIDDLE EAST

**Question:** What destinations (if any) in ASIA & THE MIDDLE EAST would you most like to visit? (Write in as many as three)



# MOST DESIRED DESTINATIONS: AUSTRALIA/NEW ZEALAND/PACIFIC

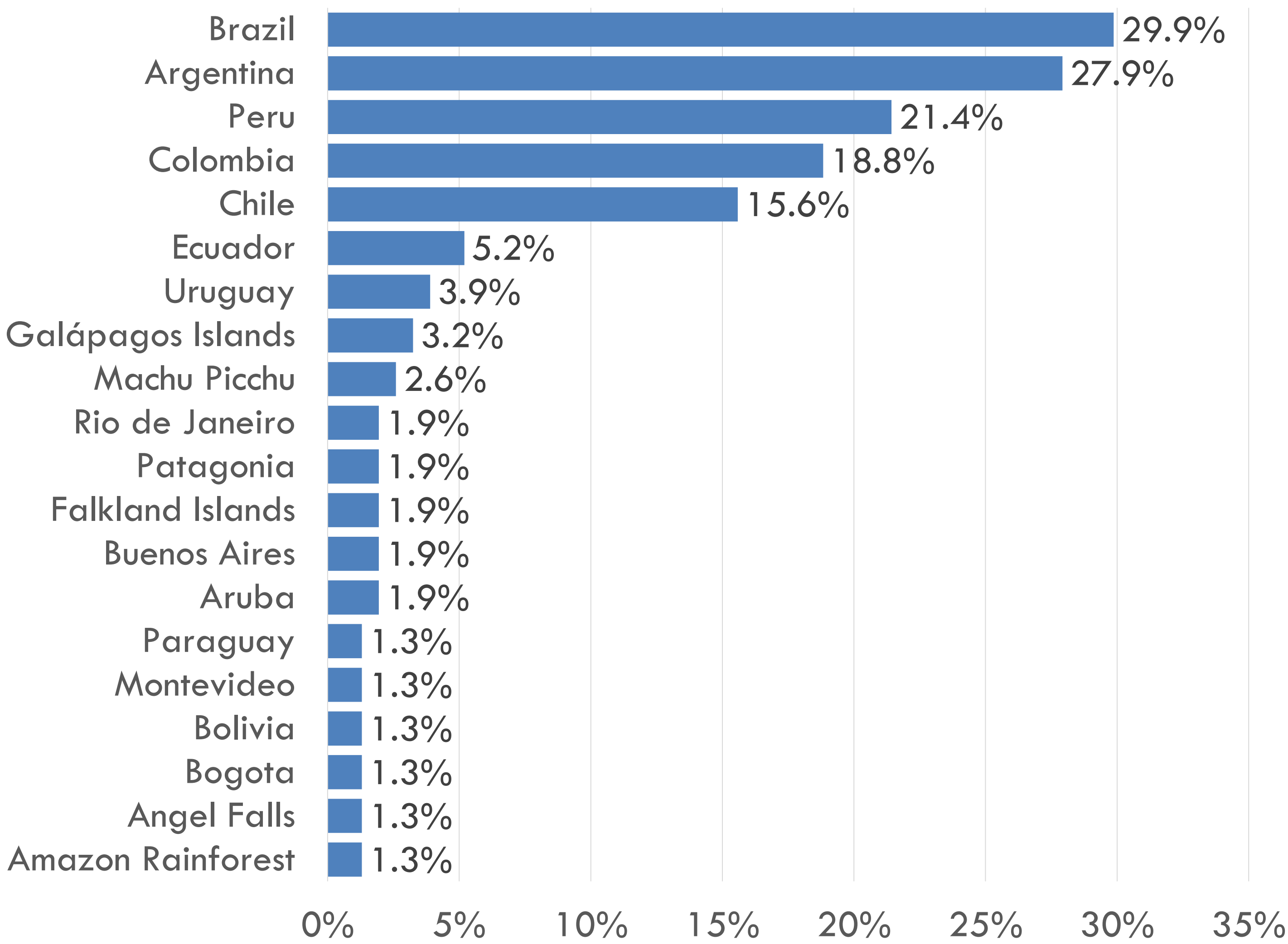
**Question:** What destinations (if any) in AUSTRALIA, NEW ZEALAND & THE PACIFIC ISLANDS would you most like to visit? (Write in as many as three)





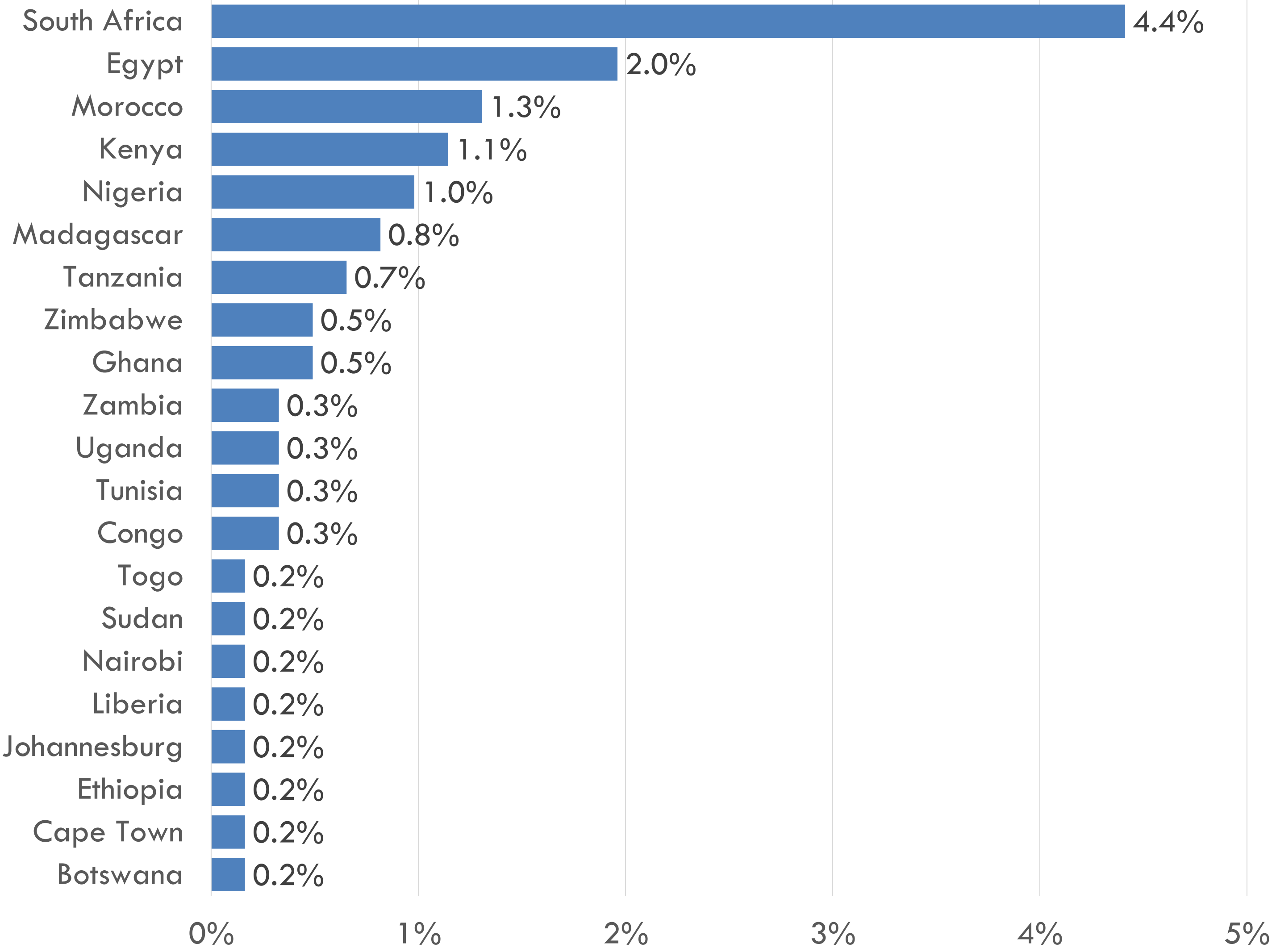
# MOST DESIRED DESTINATIONS: SOUTH AMERICA

**Question:** What destinations (if any) in SOUTH AMERICA would you most like to visit? (Write in as many as three)



# MOST DESIRED DESTINATIONS: AFRICA

**Question:** What destinations (if any) in AFRICA would you most like to visit? (Write in as many as three)







# DESTINATION PERFORMANCE BENCHMARKS

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# TWO QUESTIONS

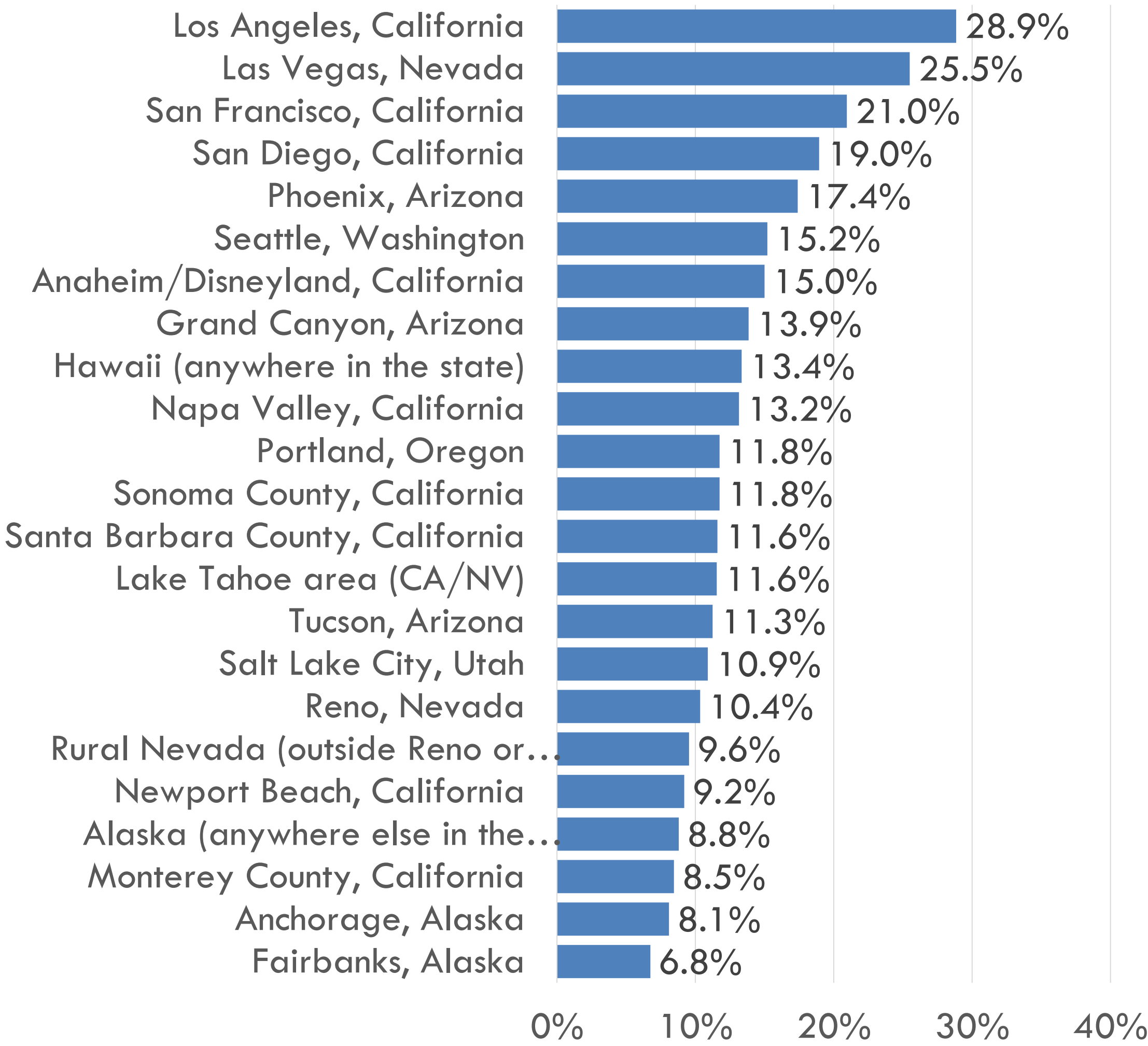
**Question:** I have  
traveled to (or within)  
in PAST THREE (3)  
YEARS

**Question:** I am likely to  
travel to (or within) in  
the NEXT THREE (3)  
YEARS



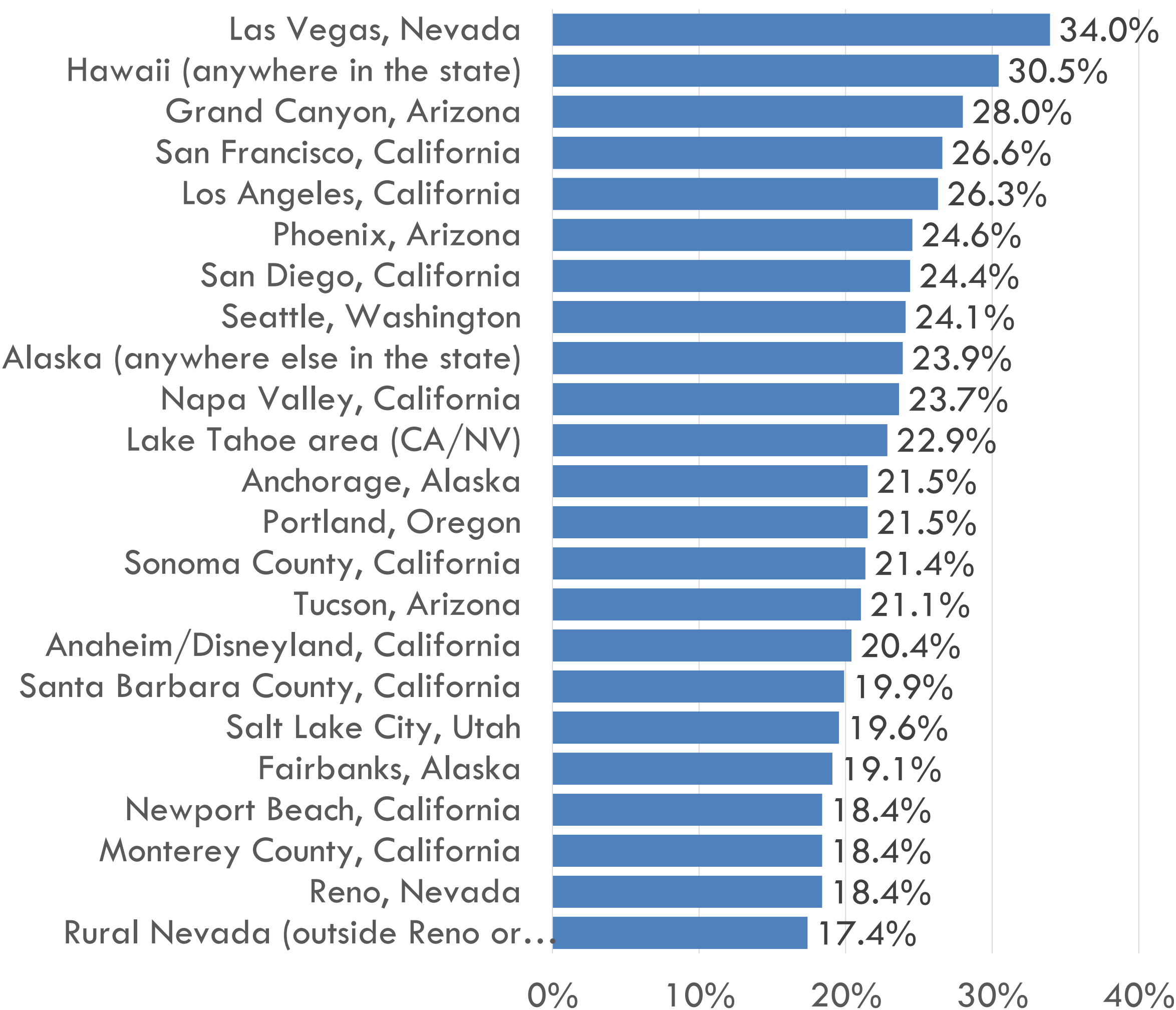
# RECENT PAST - LIKELY FUTURE VISITATION: THE WEST

RECENT VISITATION (PAST 3 YEARS)



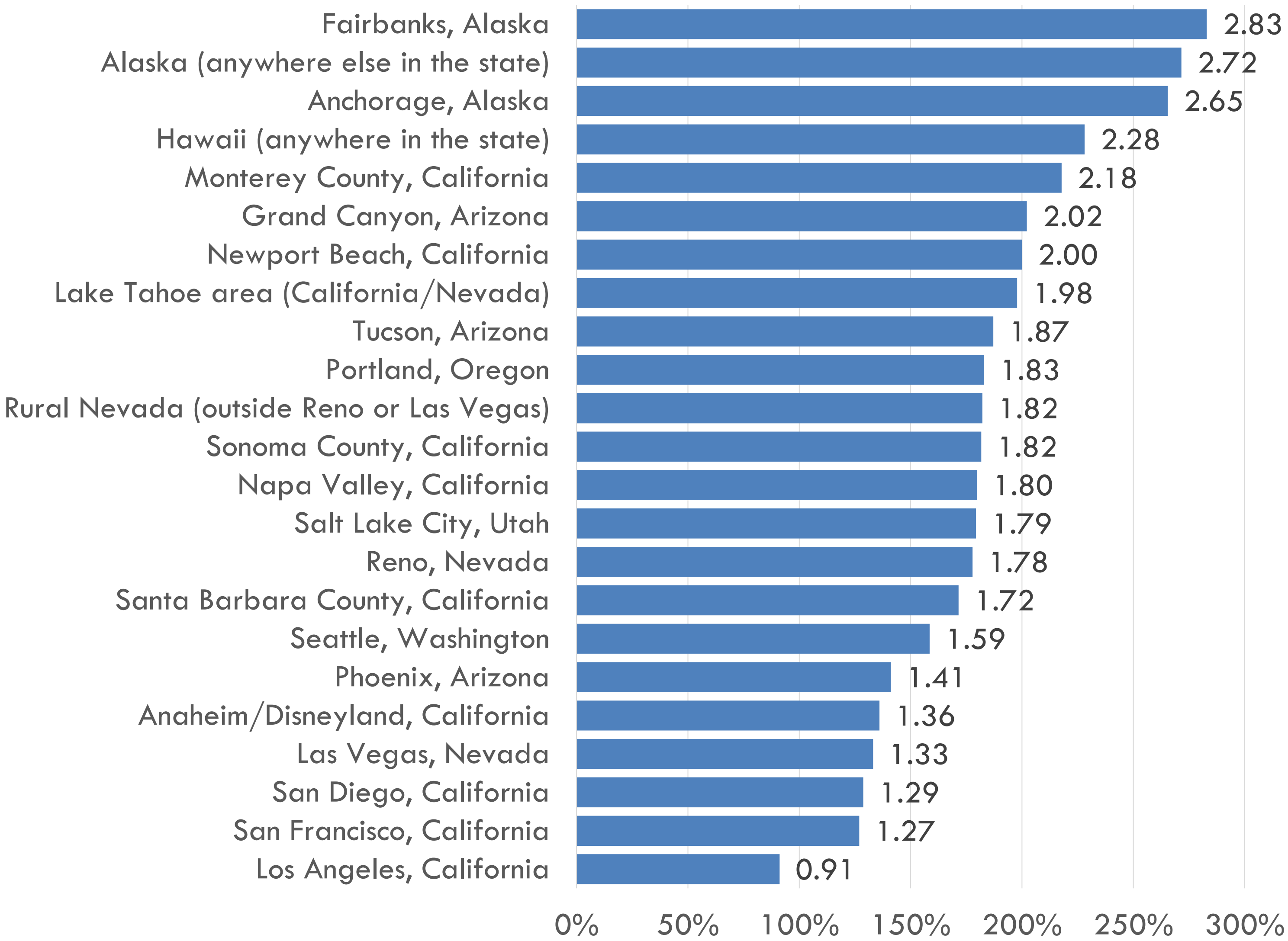
Question: I have traveled to (or within) in PAST THREE (3) YEARS

LIKELY FUTURE VISITATION (NEXT 3 YEARS)



Question: I am likely to travel to (or within) in the NEXT THREE (3) YEARS

# RATIO OF PAST TO FUTURE VISITATION: THE WEST

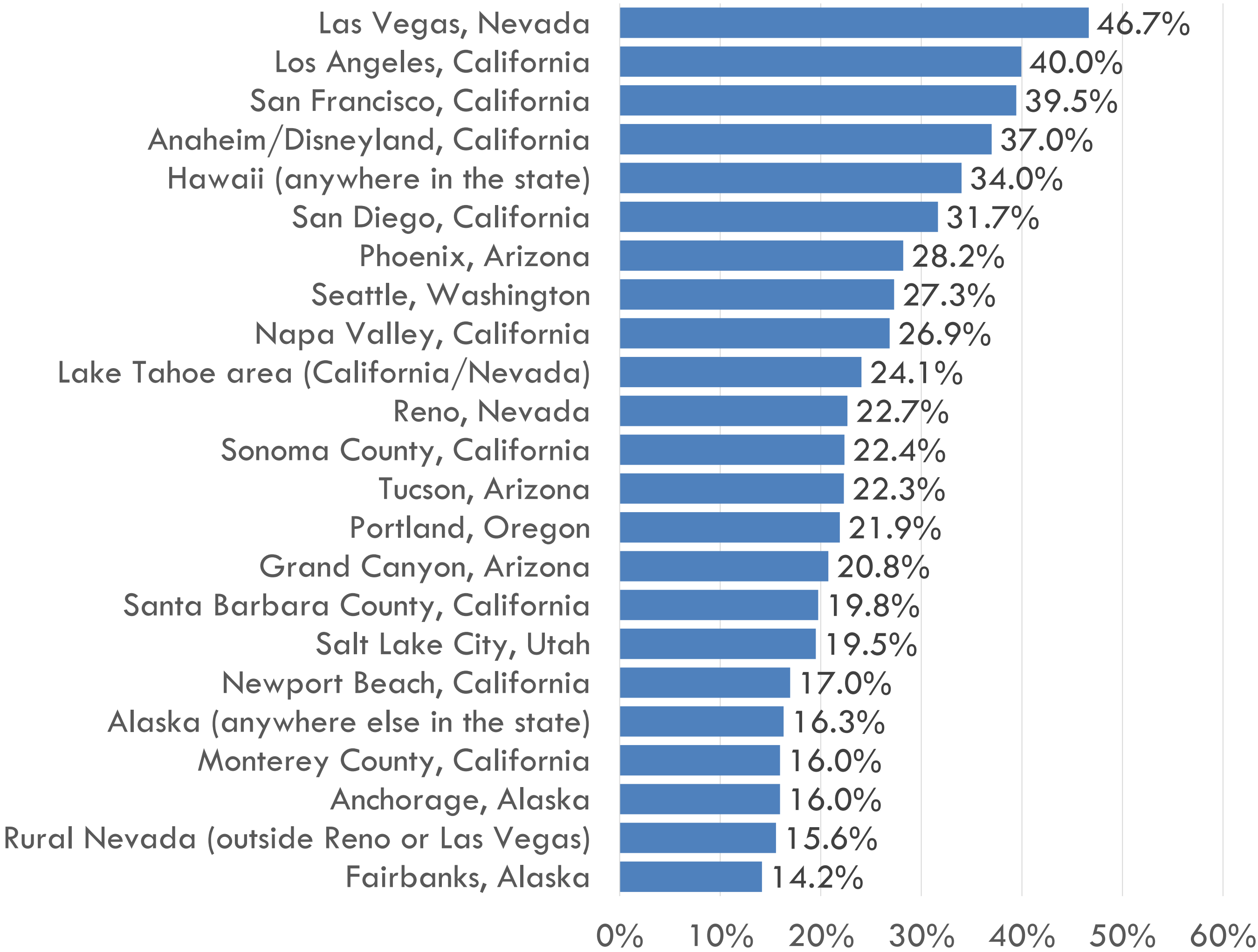




# FAMILIARITY (TOP 2 BOX SCORES)

**Question:** How familiar are you with the attractions and things to see and do in each destination?

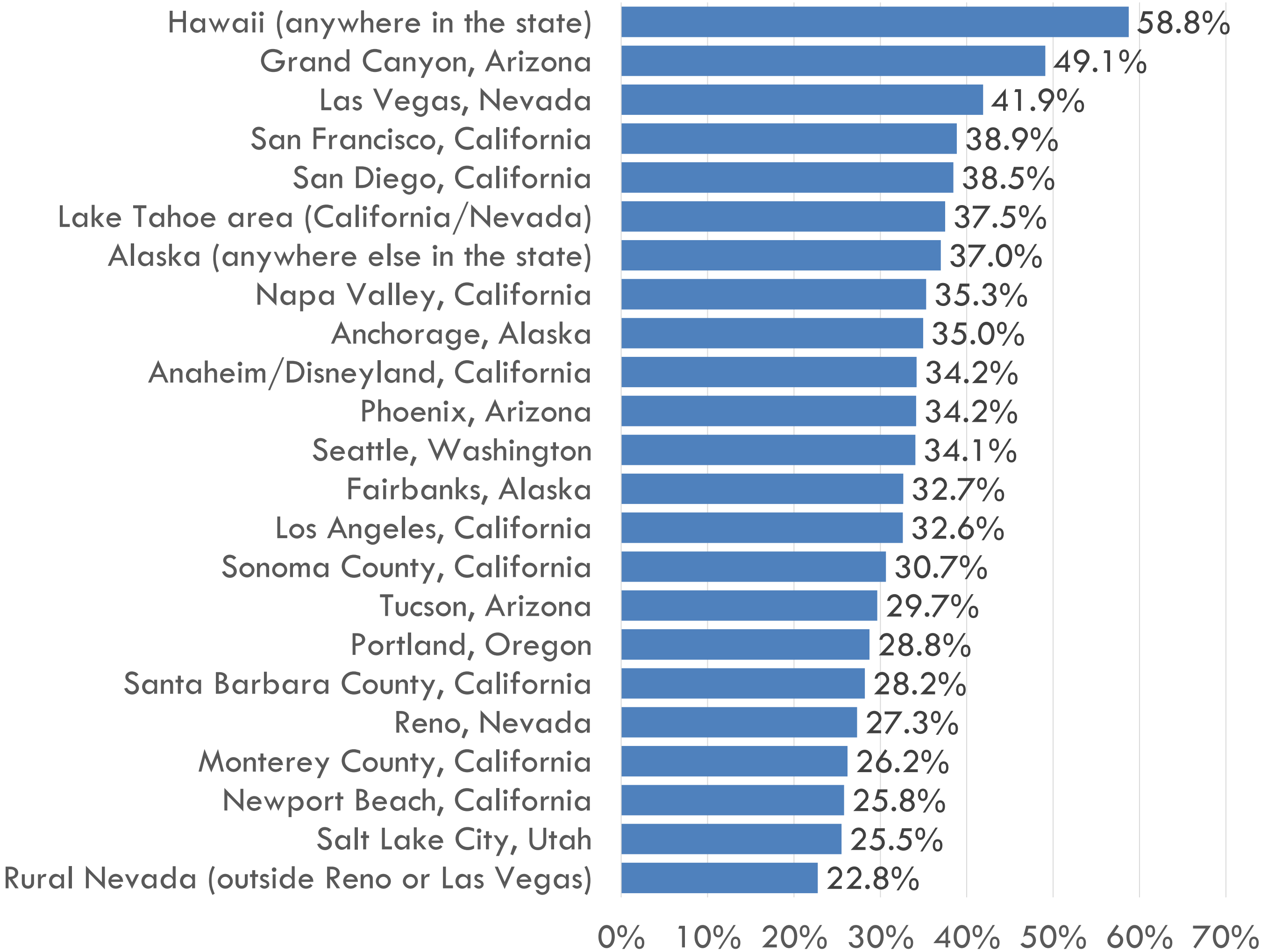
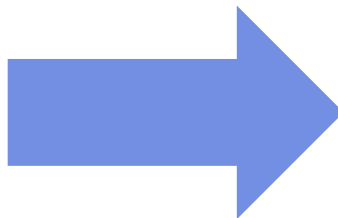
**FAMILIAR OR  
VERY FAMILIAR** 



# APPEAL (TOP 2 BOX SCORES)

**Question:** Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

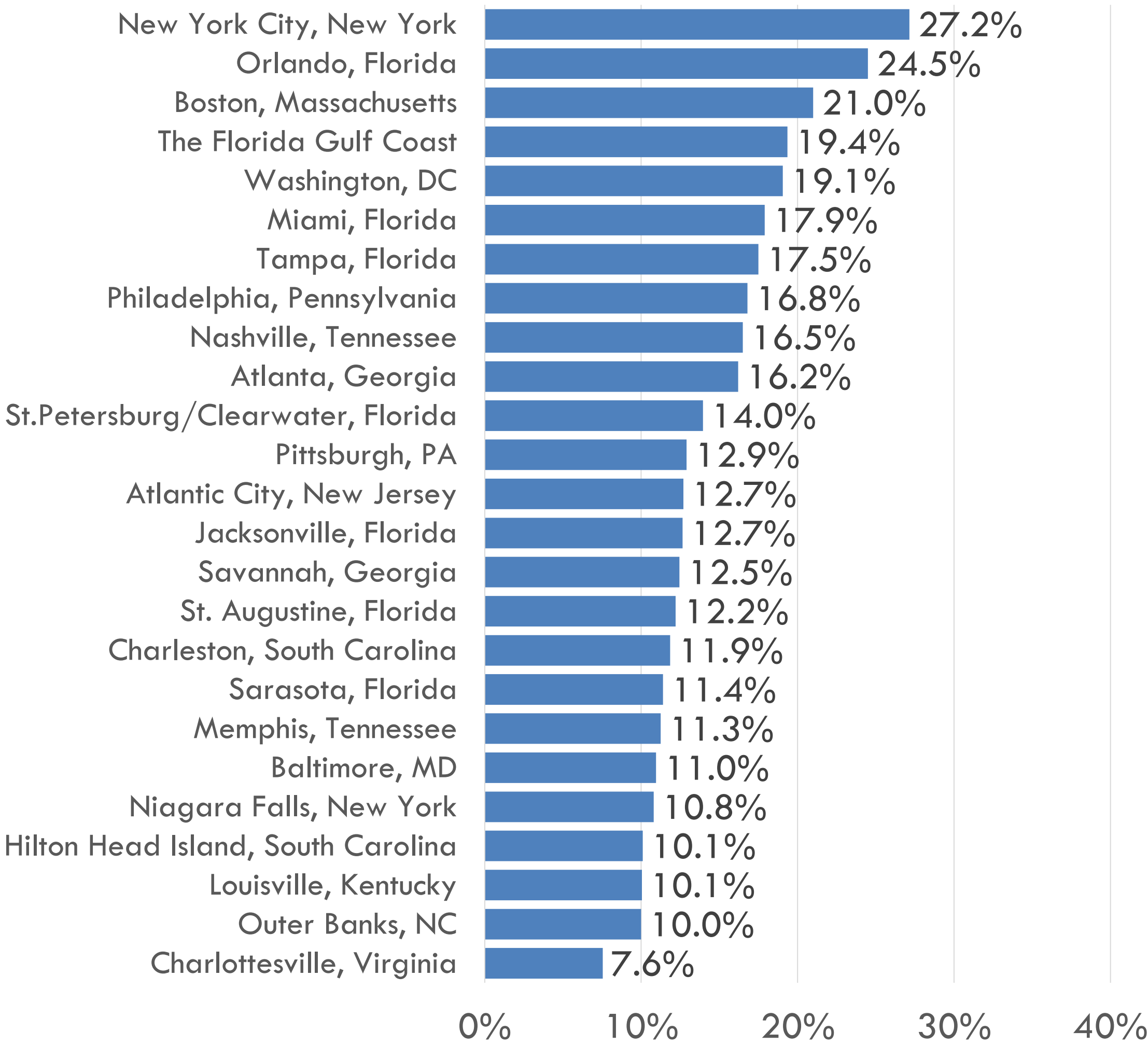
**APPEALING OR  
VERY APPEALING**





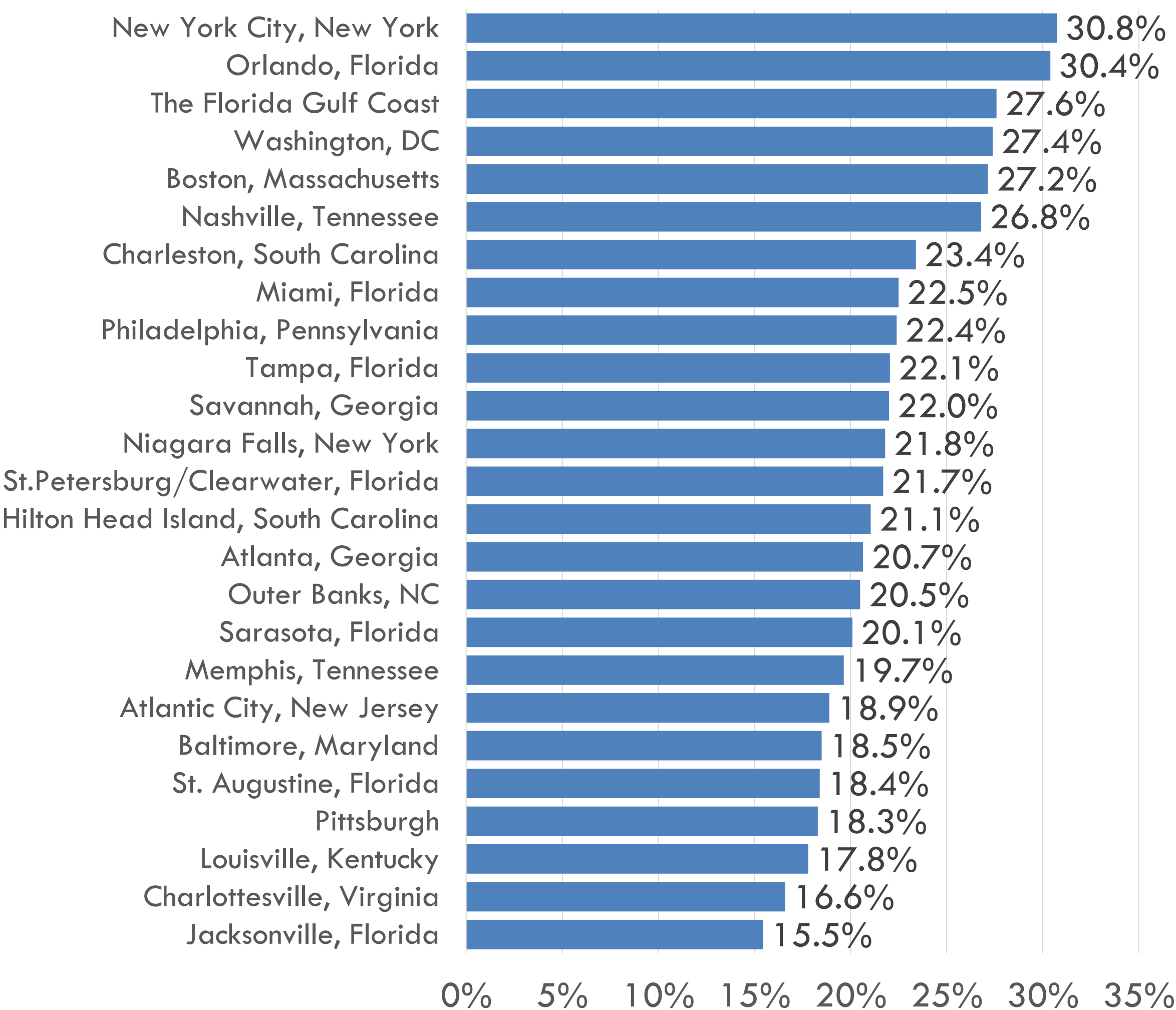
# RECENT PAST - LIKELY FUTURE VISITATION: THE EAST

RECENT VISITATION (PAST 3 YEARS)



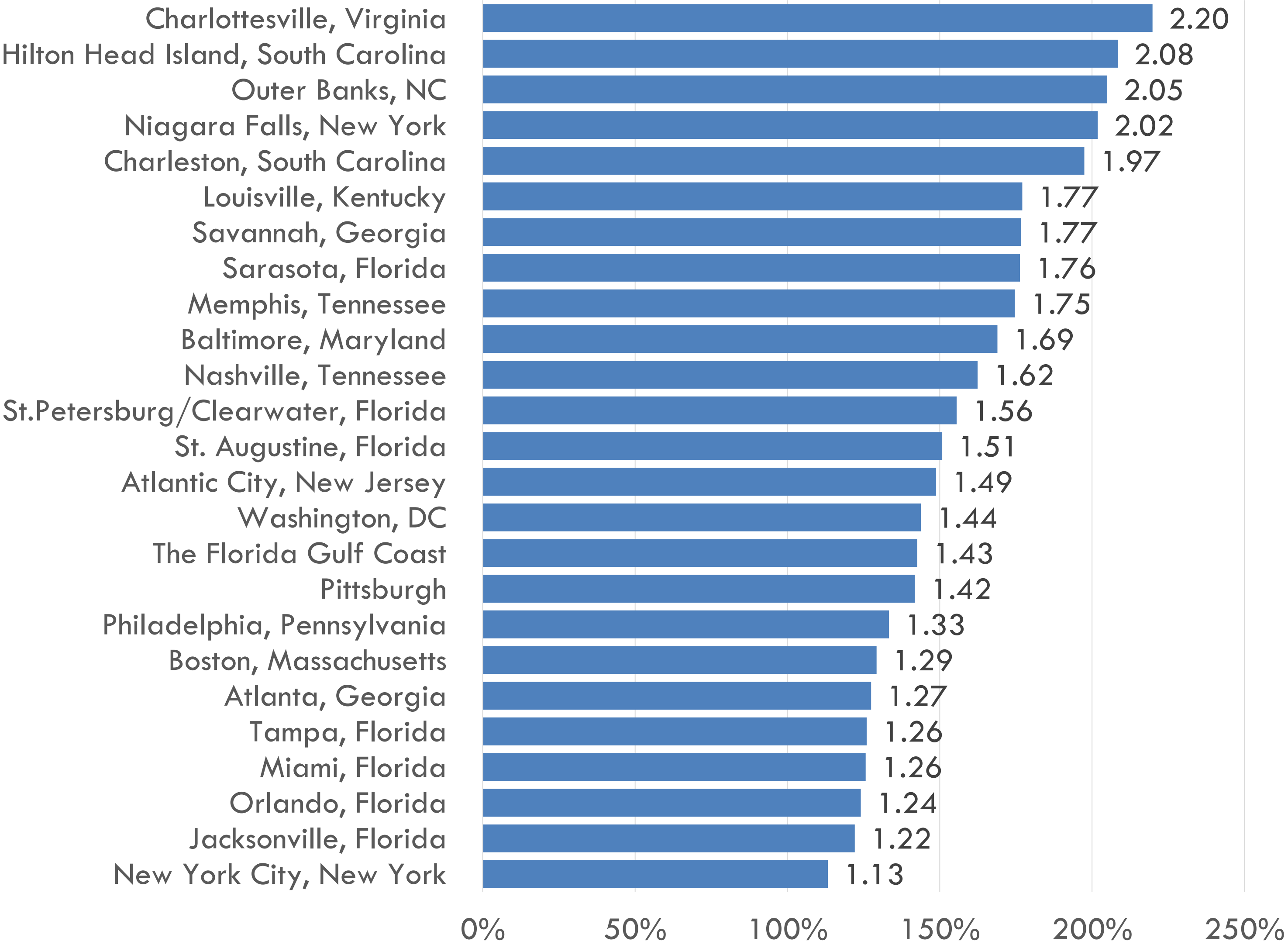
Question: I have traveled to (or within) in PAST THREE (3) YEARS

LIKELY FUTURE VISITATION (NEXT 3 YEARS)



Question: I am likely to travel to (or within) in the NEXT THREE (3) YEARS

# RATIO OF PAST TO FUTURE VISITATION: THE EAST

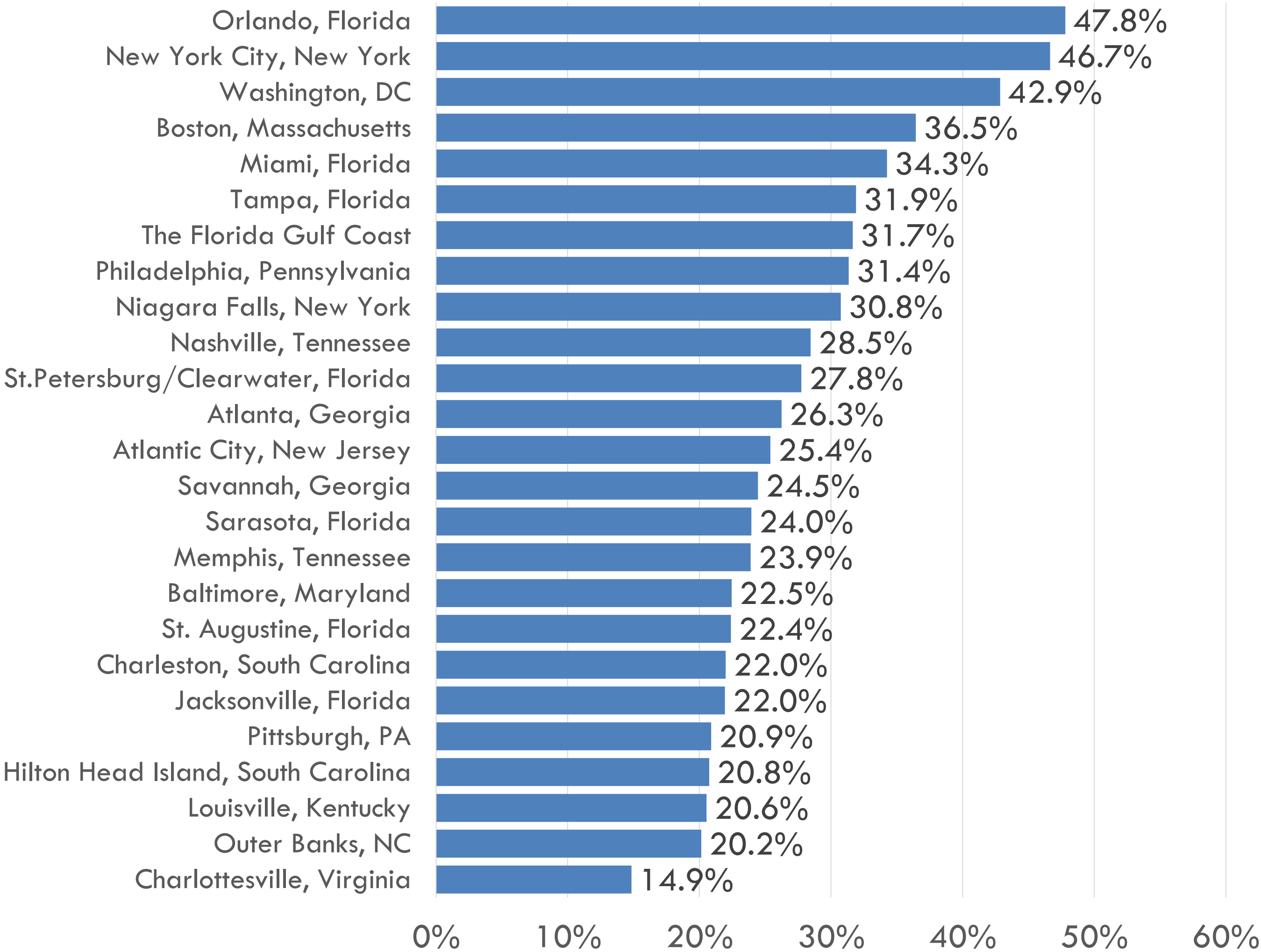
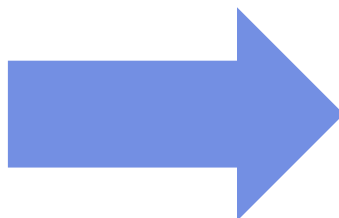




# FAMILIARITY (TOP 2 BOX SCORES)

**Question:** How familiar are you with the attractions and things to see and do in each destination?

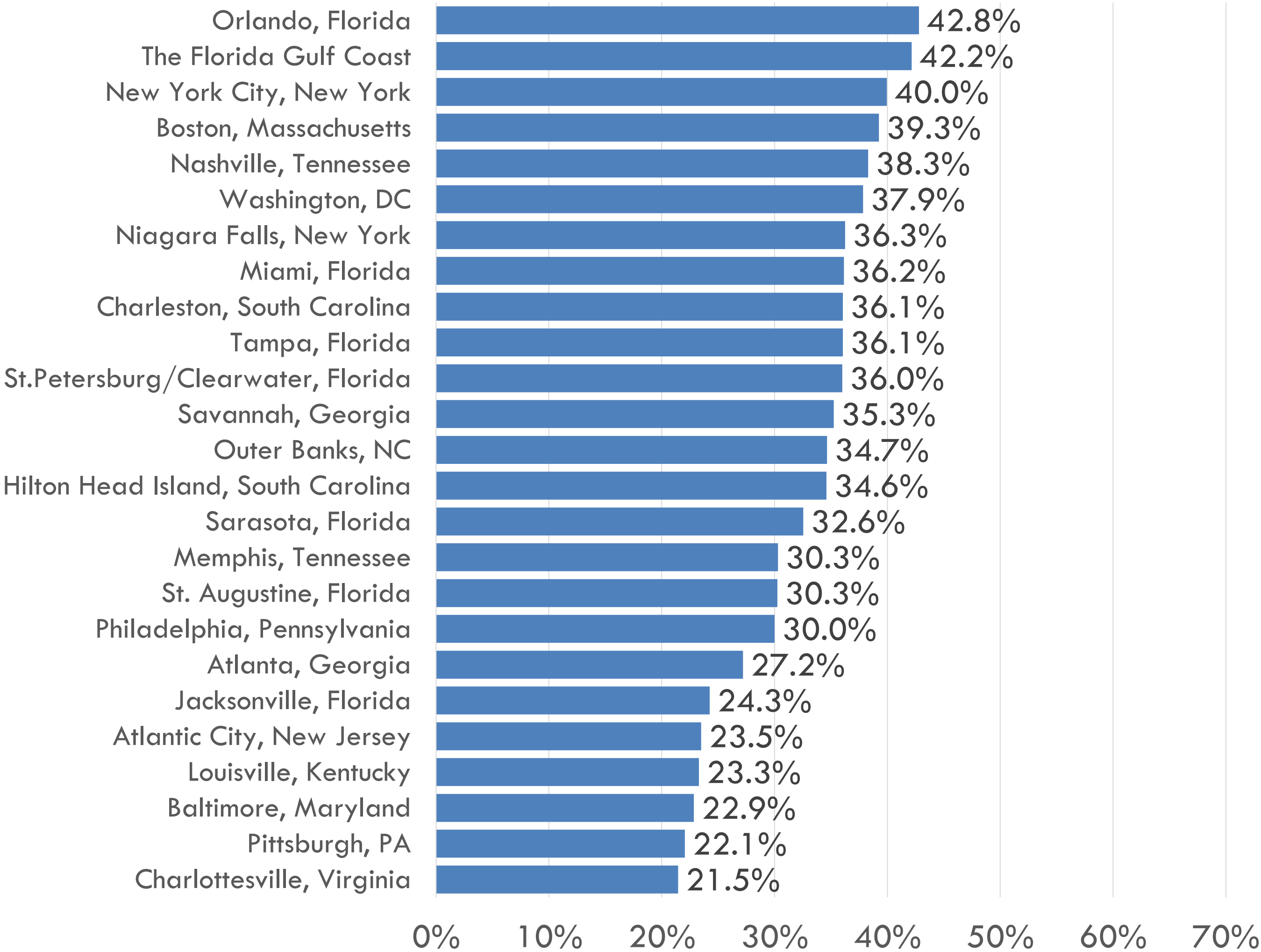
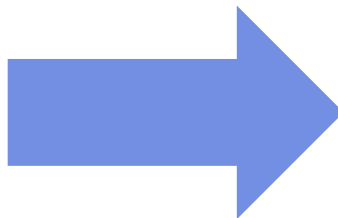
**FAMILIAR OR  
VERY FAMILIAR**



# APPEAL (TOP 2 BOX SCORES\*)

**Question:** Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

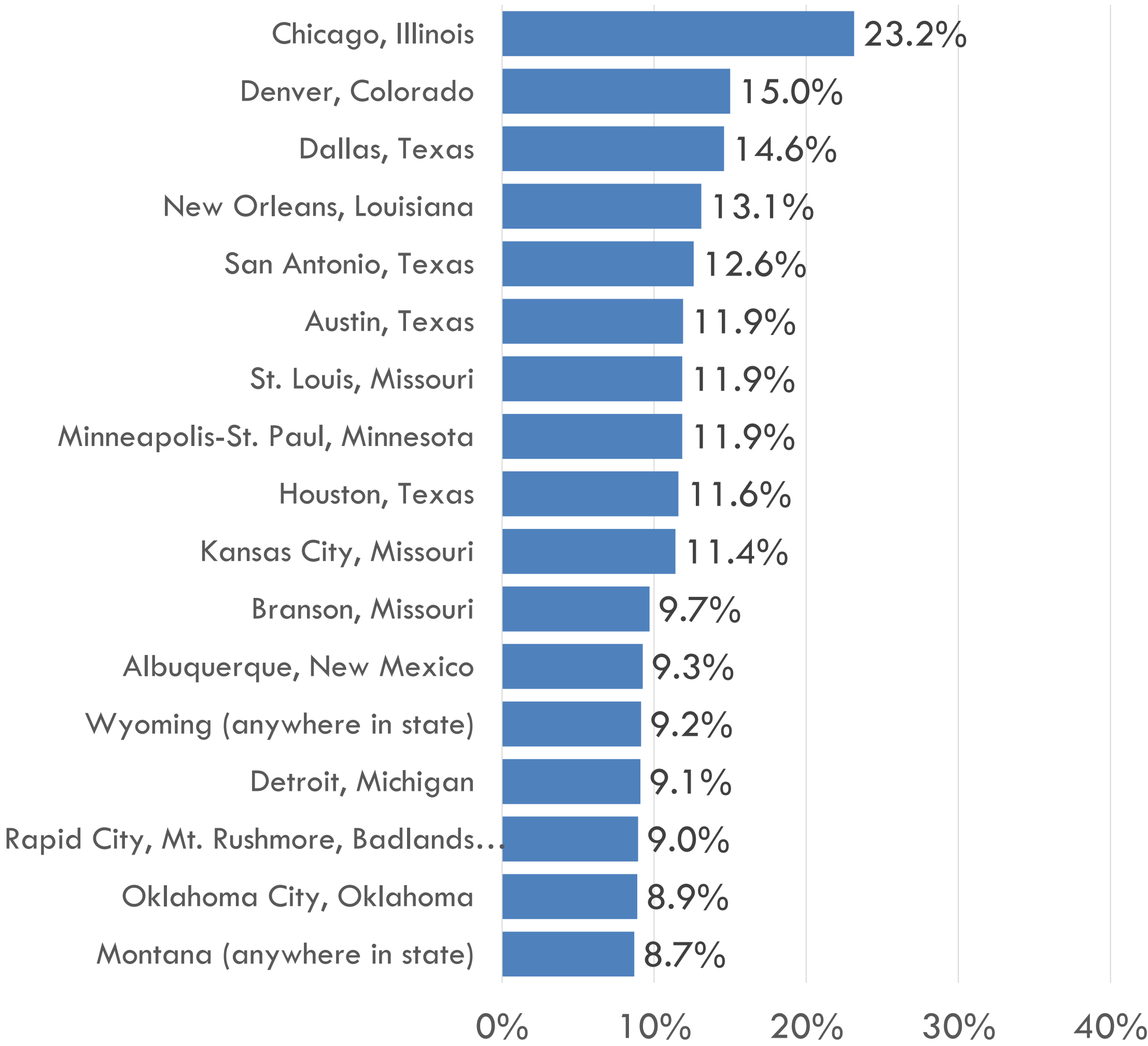
**APPEALING OR  
VERY APPEALING**





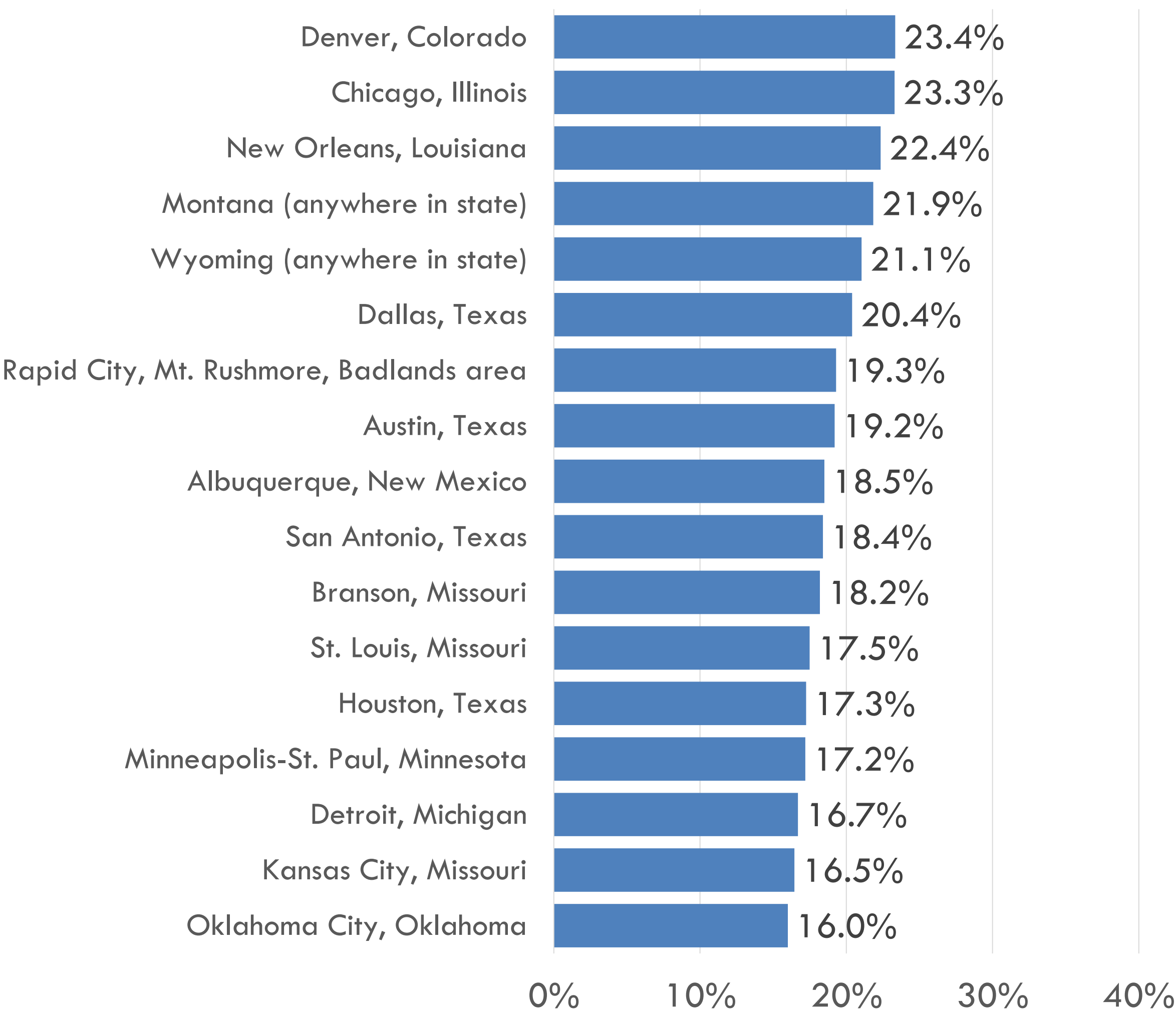
# RECENT PAST - LIKELY FUTURE VISITATION: CENTRAL

RECENT VISITATION (PAST 3 YEARS)



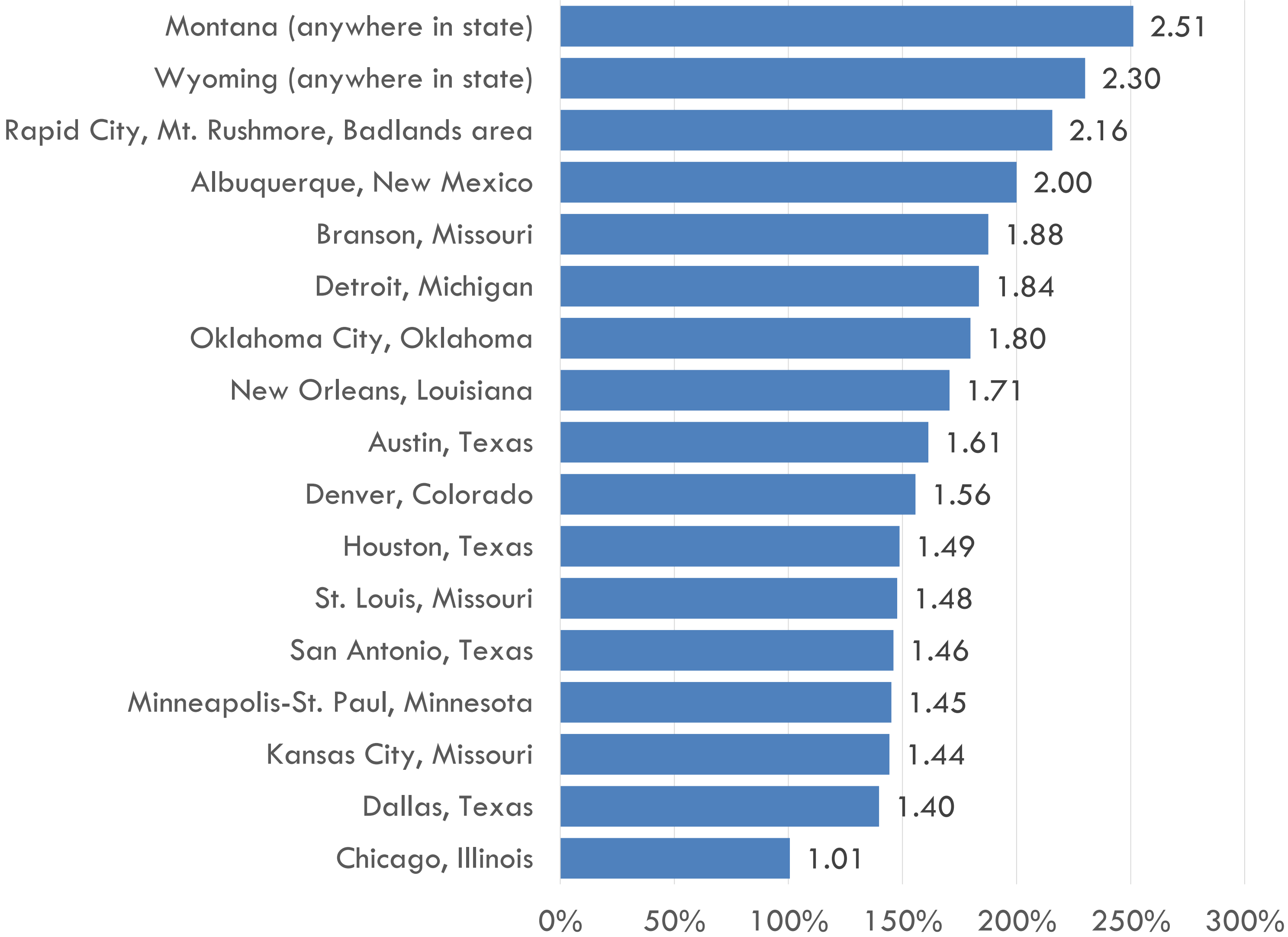
Question: I have traveled to (or within) in PAST THREE (3) YEARS

LIKELY FUTURE VISITATION (NEXT 3 YEARS)



Question: I am likely to travel to (or within) in the NEXT THREE (3) YEARS

# RATIO OF PAST TO FUTURE VISITATION: CENTRAL

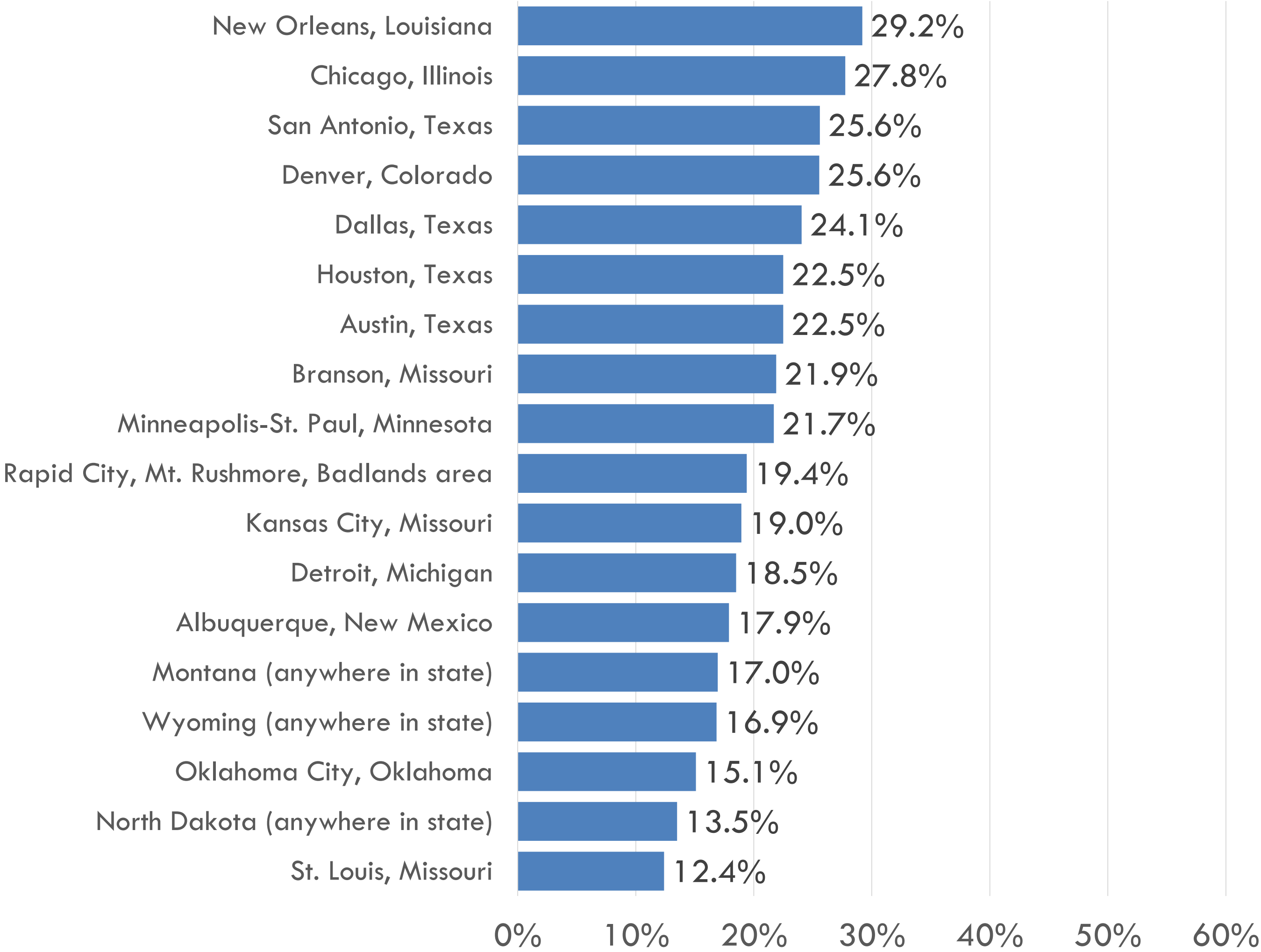




# FAMILIARITY (TOP 2 BOX SCORES)

**Question:** How familiar are you with the attractions and things to see and do in each destination?

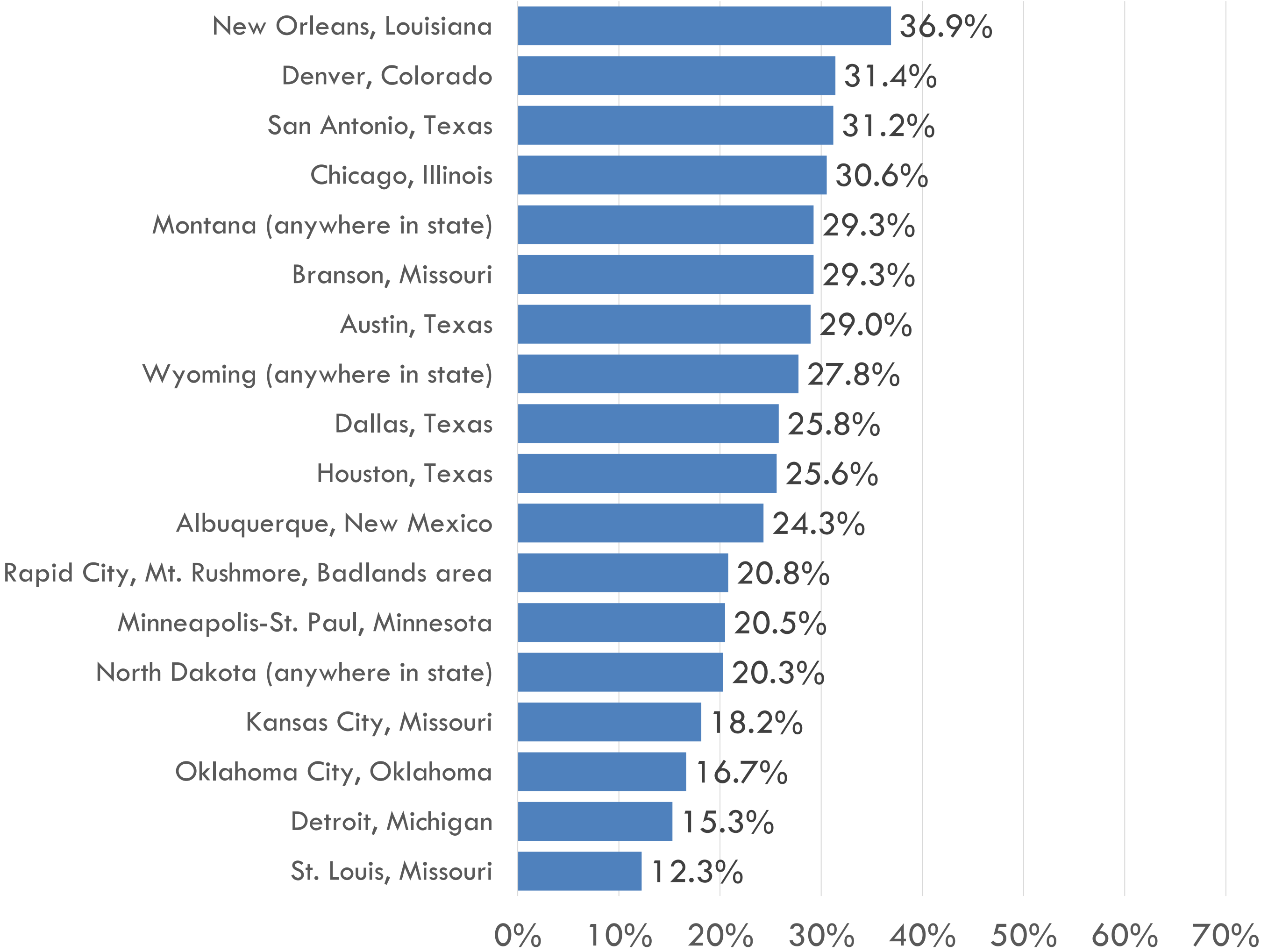
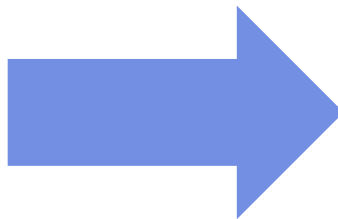
**FAMILIAR OR  
VERY FAMILIAR** 



# APPEAL (TOP 2 BOX SCORES\*)

**Question:** Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

**APPEALING OR  
VERY APPEALING**







SPOTLIGHT SEGMENT

# DMO PANEL DISCUSSION


Panelists: Jillian Simpson, Vice President, Alaska Tourism Industry Association &  
Lynn Bruni-Perkins, VP, Global Marketing Communications, San Francisco Travel

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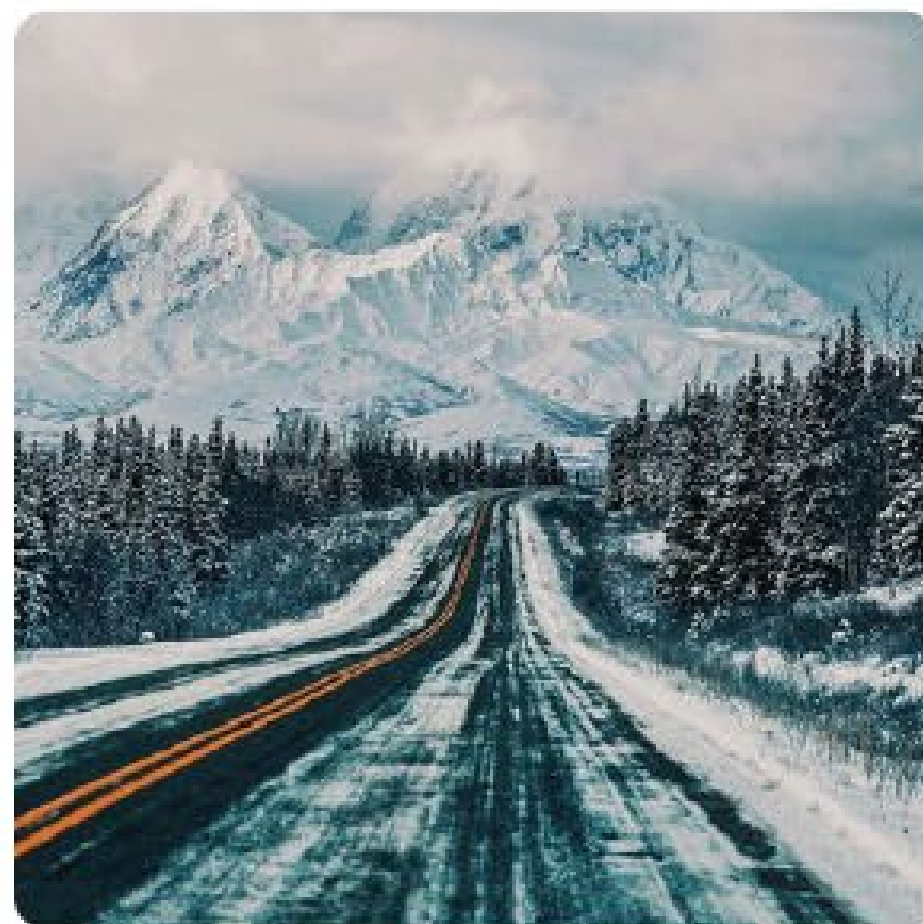


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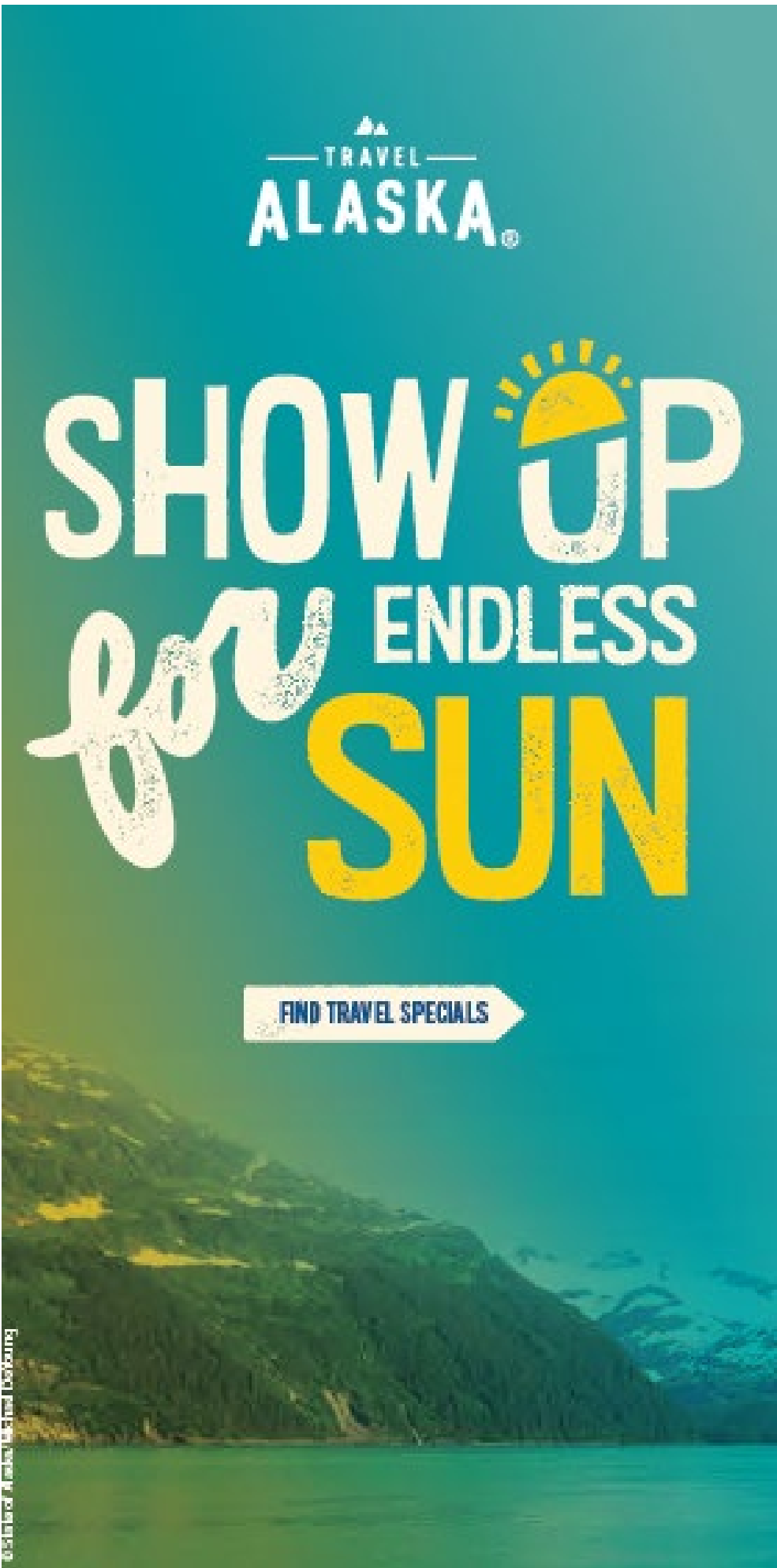
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A couple is seen from behind, paddling a canoe on a calm lake. The sun is low on the horizon, creating a warm, golden glow that reflects on the water. The surrounding hills are covered in dense evergreen forests. The overall mood is peaceful and scenic.

Q&A

Thank you!

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