

# Domestic leisure traveler sentiment in light of coronavirus/COVID-19

May 26, 2020

# Key Findings

- A more positive view of travel continues in this wave of research. However, we are also seeing some results that indicate that some travelers have postponed leisure travel until next year. There is likely a seasonal element to this, as summer travel is the main time of year for many Americans to take leisure trips. With uncertainty remaining regarding near-term travel, it appears that some households may be waiting until next summer to travel again.
- Regardless, it is notable that many consumers are not yet ready to welcome visitors to their communities, even as they recognize the importance of tourism to their area. One of the key drivers to differences throughout the data is the type of community in which respondents live; rural and small-town consumers are less likely to know of cases and therefore generally more in favor of returning to normal.
- On the other hand, with many destinations seeing higher than expected leisure activity over the Memorial Day weekend, it may be that the summer 2020 travel season is more robust than these initial figures indicate.
- Agreement continues to grow with the statement, “I am now more likely to take a road trip than I was before the coronavirus.” So while planned trips may be falling by the wayside, consumers may be venturing out for shorter leisure trips as a way to return to a feeling of “normal.”
- Messaging that builds confidence among consumers includes behavioral safety precautions, such as social distancing, occupancy limits, and mask requirements. Additionally, consumers want to know about sanitizing protocols and that there is a destination-wide plan in place to re-open.
- While most consumers remain cautiously optimistic, this depends in large part on individual views and experience. Roughly 10% of travelers are tired of the restrictions and determined to return to travel very soon. Communicating expectations will be of utmost importance to ensure these early travelers have a safe and positive experience, and to ensure that destinations remain safe for their residents.

# Key Findings: Ready to Travel



What characterizes those ready to travel?

- Are more likely to be Caucasian
- Have a higher income
- Are more likely to be male
- Live in an area with fewer known cases of the virus
- Think the response to the virus has been too restrictive



What doesn't define those ready to travel?

- Age
- Education
- Region

# Methodology

- SMARInsights initiated a research effort in early March 2020 to measure consumer sentiment toward leisure travel in light of the coronavirus/COVID-19 pandemic. This report covers the fifth wave of research, conducted May 20, 2020. Results from prior waves are also included.
- In all waves of research, respondents were screened to ensure they:
  - Regularly take leisure trips of at least 50 miles from home and/or that include an overnight stay
  - Are leisure travel decision-makers for their households
  - Are 18 years or older
- Data were cleaned, coded, and prepared for analysis.

Research wave	Data collection	Surveys completed
Wave 1	March 5	600
Wave 2	March 12-13	750
Wave 3	March 19-20	777
Wave 4	April 16-17	751
Wave 5	May 20	754

# Timeline of Key COVID-19 Events



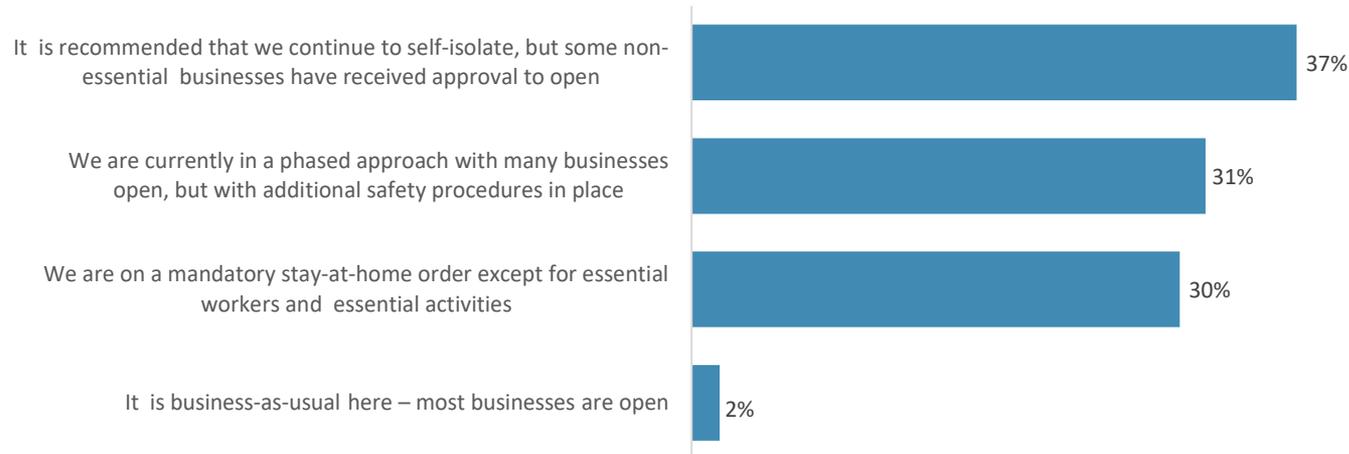
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# **MAY 26, 2020 REPORT**

# There is variation among travelers' community response to the pandemic.

- Roughly a third of consumers describe their community as being on strict lockdown, having a phased-in re-opening, and having self-isolation recommendations. There is a slight skew toward the latter description. This is relevant since our local communities are the lens through which we view the outside world. Consumers are likely to engage in leisure activities close to home before setting out to visit other places.

Currently, how 'open for business' is the community where you live?



Consumers remain cautious but optimistic. While nearly 40% have not yet done any of these leisure activities, a third have engaged in outdoor activities, and a quarter have taken scenic drives.

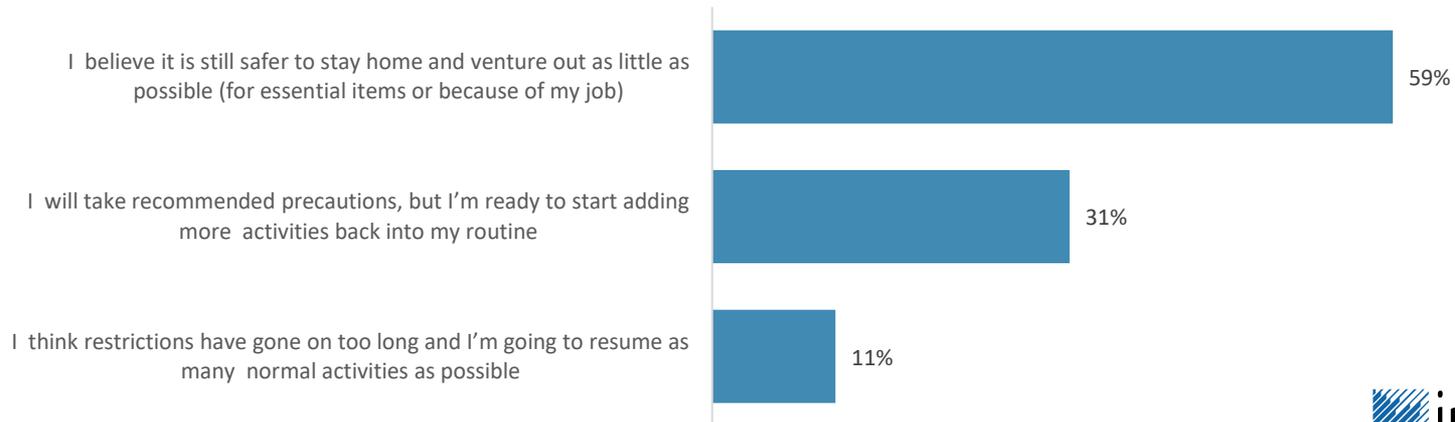
- In most cases, the share of consumers who intend to do these activities is higher than the share of those already doing them. So the anticipation is that people will continue to venture out more and more as it is safe to do so.

Which of these activities...?	...have you done in the past week	...do you intend to do in the next 2 weeks
None of these	38%	26%
Participate in outdoor activities	32%	40%
Take a drive with scenic views	25%	35%
Shop at local stores and boutiques	24%	34%
Go on a hike	19%	29%
Indulge in local cuisine and restaurants	11%	21%
Go to a spa or salon	5%	13%
Explore a vibrant downtown area	3%	6%
Stay in a hotel	3%	5%
Relax in a cabin or vacation rental	3%	5%
Go to a brewery or out for cocktails	2%	5%
Visit museums or attractions	2%	4%
Attend theater or concerts at small venues	2%	2%
Participate in an outdoor festival	2%	3%
Take a sightseeing tour on a bus or trolley	1%	2%
Go to art galleries or studios	1%	2%

# Most travelers remain cautious, but a small share is eager to get out again.

- More than half of consumers are staying home except for necessary errands. Just under a third are ready to start adding “normal” activities back into their lives. A small but interesting group – just 11% – believe the restrictions have gone on too long and are reverting to many of their pre-pandemic behaviors.

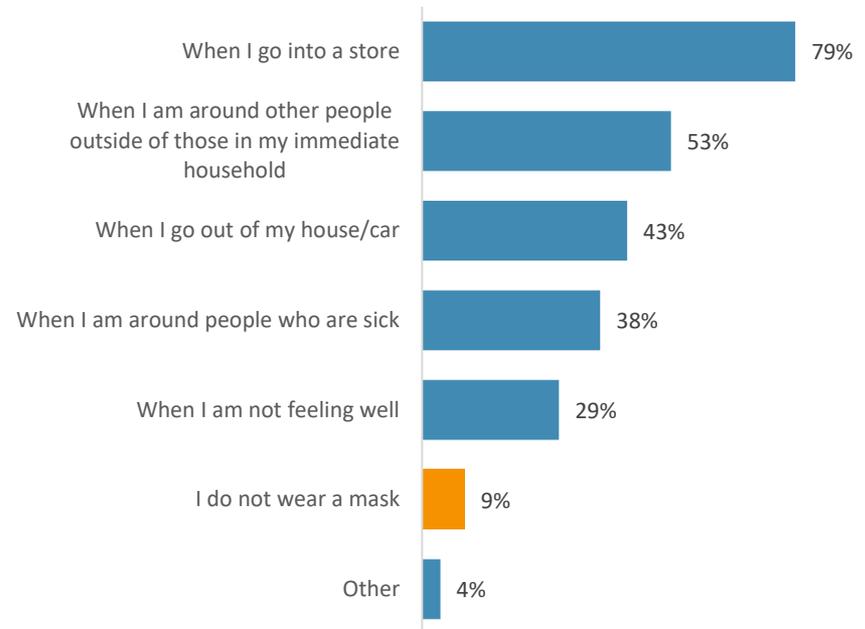
Which of the following best describes your intended behavior within the next week?



# Nearly 80% of consumers wear masks in stores; 9% never wear them.

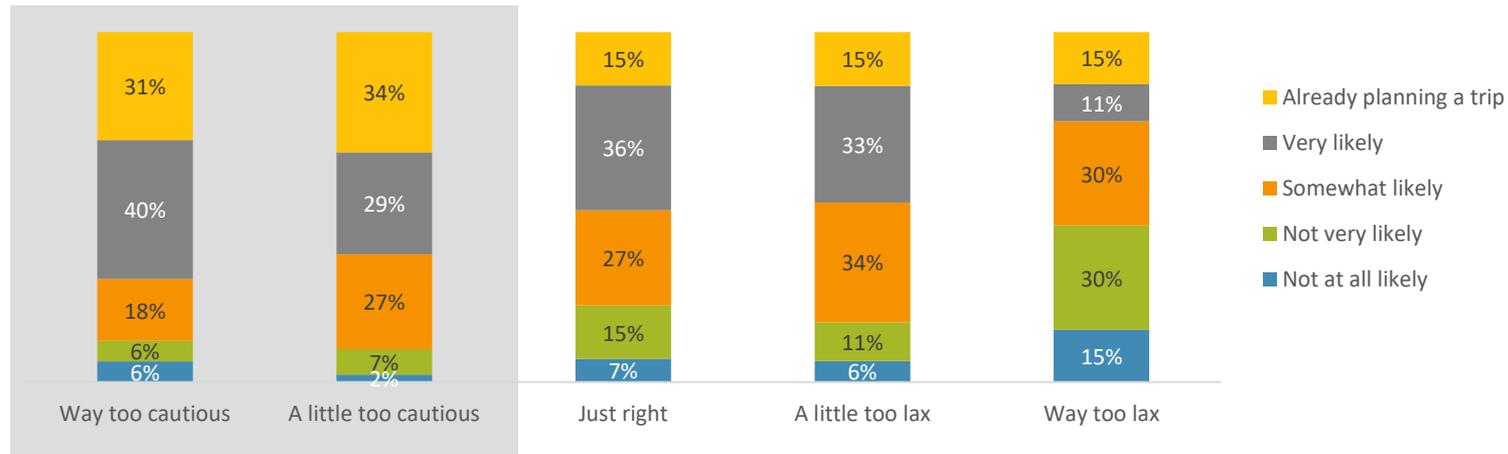
- Among travelers who feel restrictions have gone on too long, 43% do not wear a mask when they go out. This is the same group that is already planning travel. More than 60% of these same consumers are comfortable staying in a hotel and attending a large outdoor event.
- These consumers tend to be conservative politically, live in rural communities, are aware of few/no cases, and believe the local response has been too restrictive.
- This presents somewhat of a dilemma for destinations, as they attempt to manage leisure travel in a manner that is safe for their residents as well as visitors. Communicating acceptable behaviors will be a crucial part of opening destinations.

When do you wear a mask?



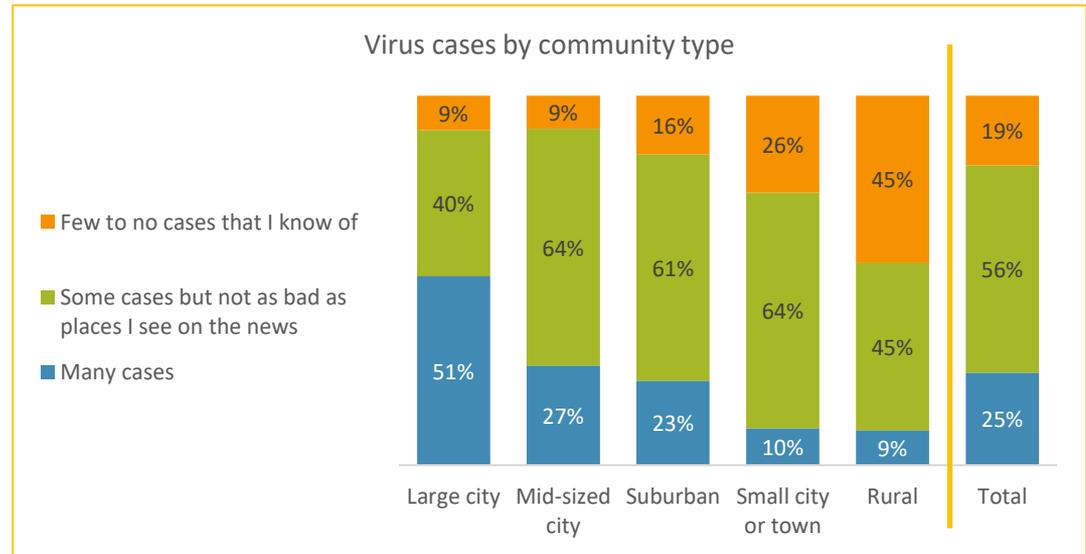
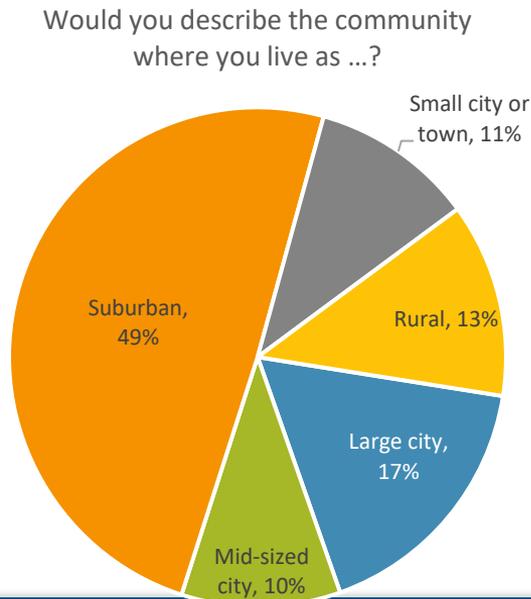
# Those most likely to travel are those who view the response in their community as too restrictive.

Likelihood to travel by views of community response



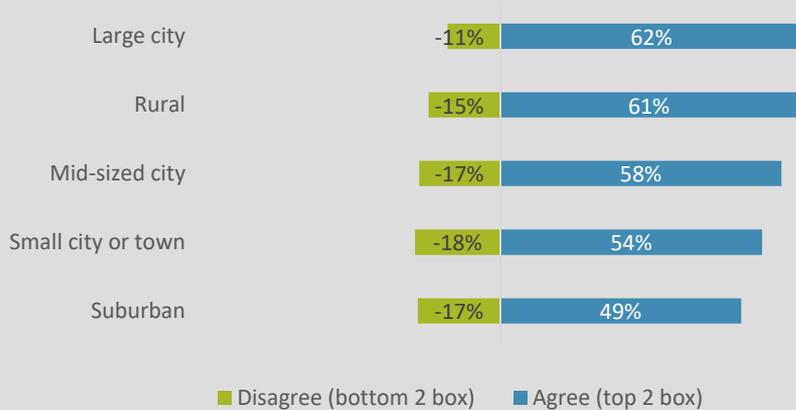
# City dwellers have seen many cases of the virus; rural travelers have seen few to none.

- Nearly half of respondents describe their community as suburban. More than 60% of suburbanites and those who live in small to mid-sized cities say their communities have some cases of the virus but not a widespread outbreak.

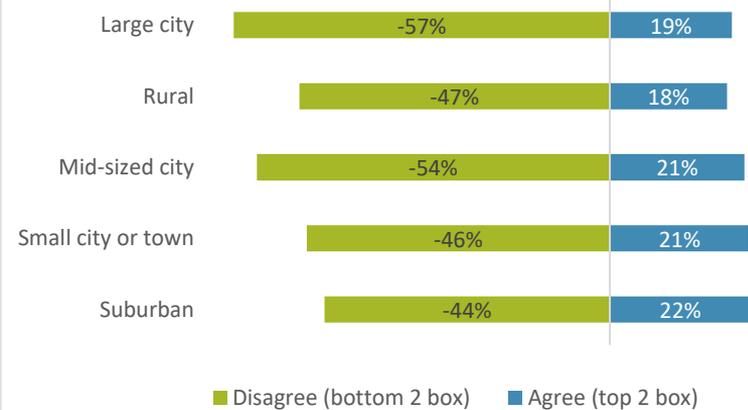


# Travelers recognize that tourism is important to their communities but are cautious about interacting with visitors.

## Tourism is important to local businesses and to my local economy



## I'm ready to welcome tourists back to my area



As many travelers now say they are likely to drive rather than fly as are unable to think about leisure travel. Consumers are thinking of trips close to home.

**After the current guidance to stay home has been lifted and travel is safe again, how do you think your leisure travel behaviors will be different, compared to before the coronavirus pandemic?**

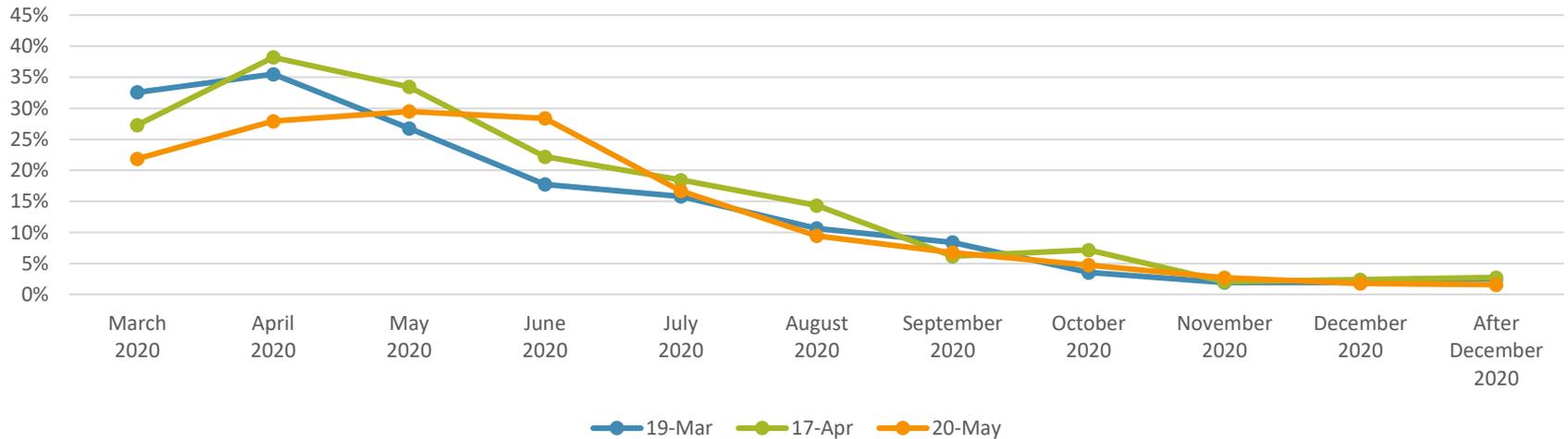
% who agree with each statement	17-Apr	20-May
I can't even think about leisure travel right now	30%	27%
I think I will be more likely to drive than fly on leisure trips	27%	27%
I think I will be more likely to take trips closer to home	24%	25%
I would rather stay in my state or surrounding states for right now	22%	24%
I don't think my leisure travel will be any different	23%	21%
I will not visit large cities as much as I used to	20%	20%
I think I will spend more time researching my trips than I used to	18%	20%
I think I will plan my trips in more detail	18%	20%
I think I will be less likely to take last-minute, spur-of-the-moment trips	15%	18%
I will take more day trips than I used to	13%	18%
I think I will be less likely to stay overnight away from home	12%	16%
I will be more likely to stay in a hotel than in a homeshare	12%	16%
I think I will be more likely to go camping than stay in a hotel	8%	10%
I will be more likely to stay in a private home like an Airbnb than in a hotel	8%	7%

Those who say their leisure travel won't be any different than before tend to feel their local response is too restrictive.

Consumers could select multiple responses.

As of late May, there is a higher share of June trips that are being canceled. Although still not as many as in April and May. Summer is the main travel season, so this is when most travelers have trips to cancel. From July through the end of the year, there has been little change in cancellations.

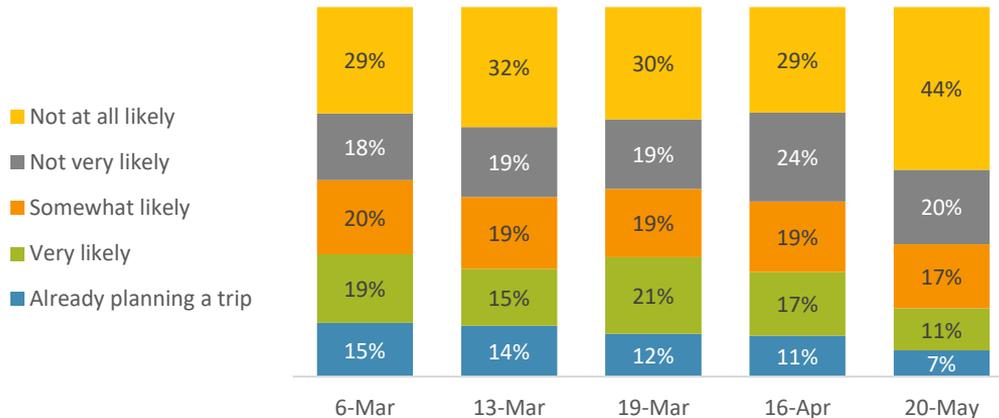
When were the leisure trip(s) planned that you canceled or postponed? Select all that apply



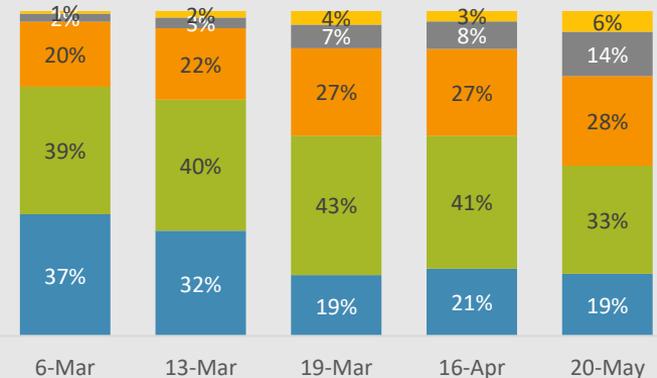
# 12-month planning window

- Near-term international travel is not happening. Domestically, the shares of travelers already planning a trip are holding steady, but there is growth among those reporting no likelihood to travel for leisure. Decreased income does not appear to be the driver of lower likelihood to travel. Rather, it may be that summer 2020 travel is slipping away.

How likely are you to travel internationally in the next 12 months?

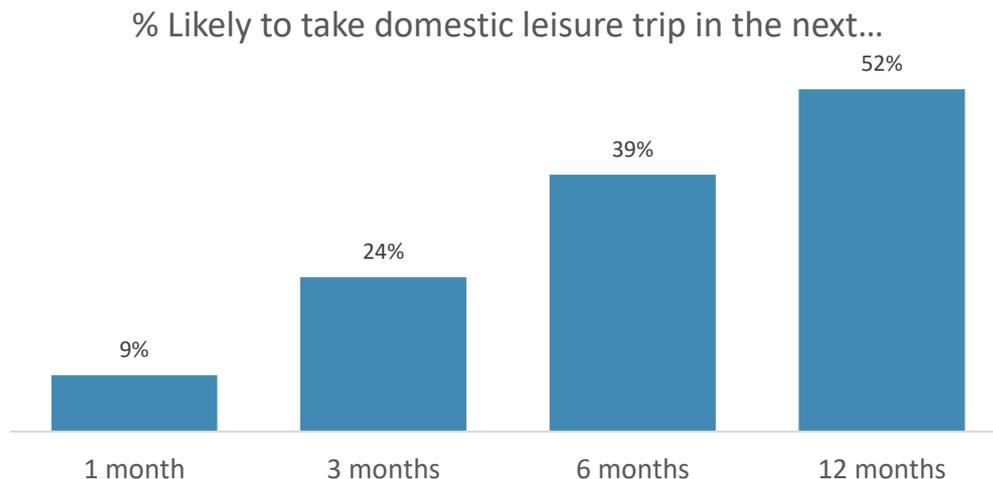


How likely are you to take a leisure trip in the U.S. in the next 12 months?



# 12-month planning window

- To further explore when travel will resume, a timing question was added. This supports that few are ready to travel immediately and only about a quarter anticipate a domestic leisure trip in the next 3 months.
- It is also concerning that even though this study is conducted among those who normally take a leisure trip at least once a year, only about half are likely to take a trip in the next 12 months.

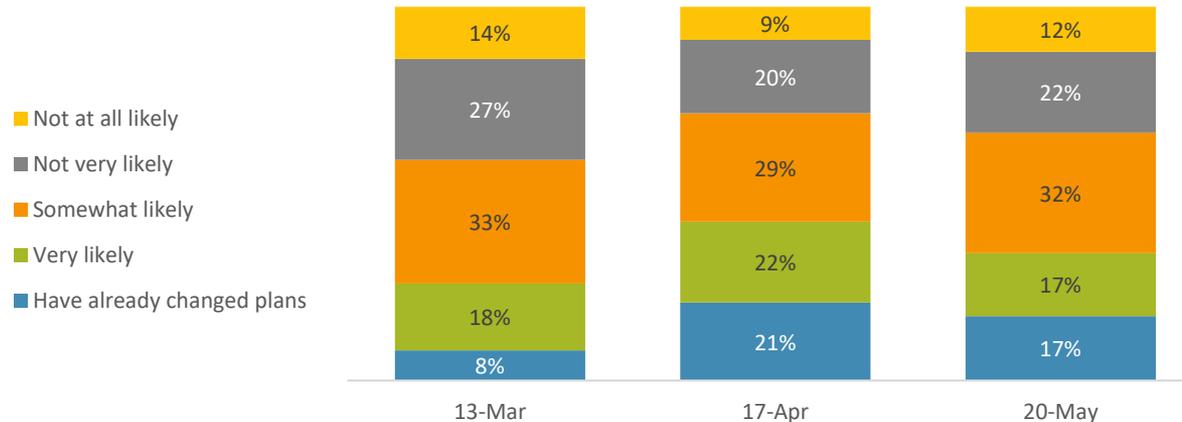


Shown is percent already planning a trip and those very likely

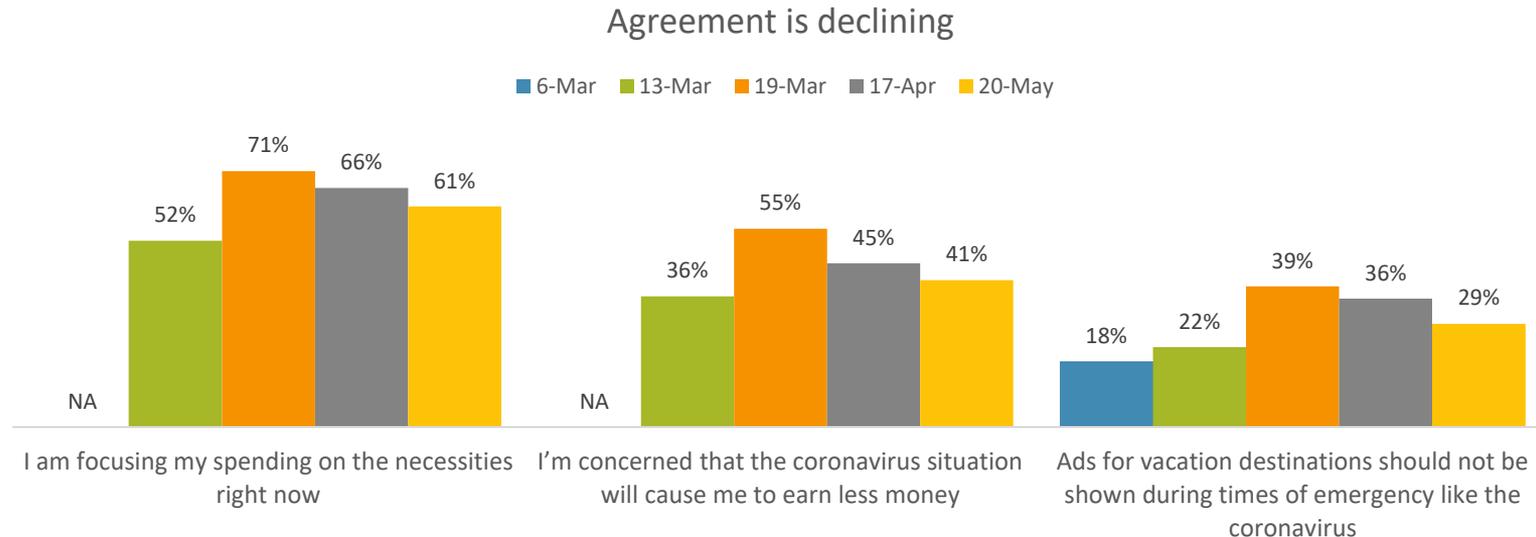
# About a fifth of consumers have changed travel plans due to concerns about the economy. More travelers say the economy is unlikely to impact their travel plans.

- A third of the people we surveyed have had their household income decrease. But, while a third have decreased income, they do not report lower likelihood to travel.

How likely is it that concerns about the economy will cause you to change your travel plans?

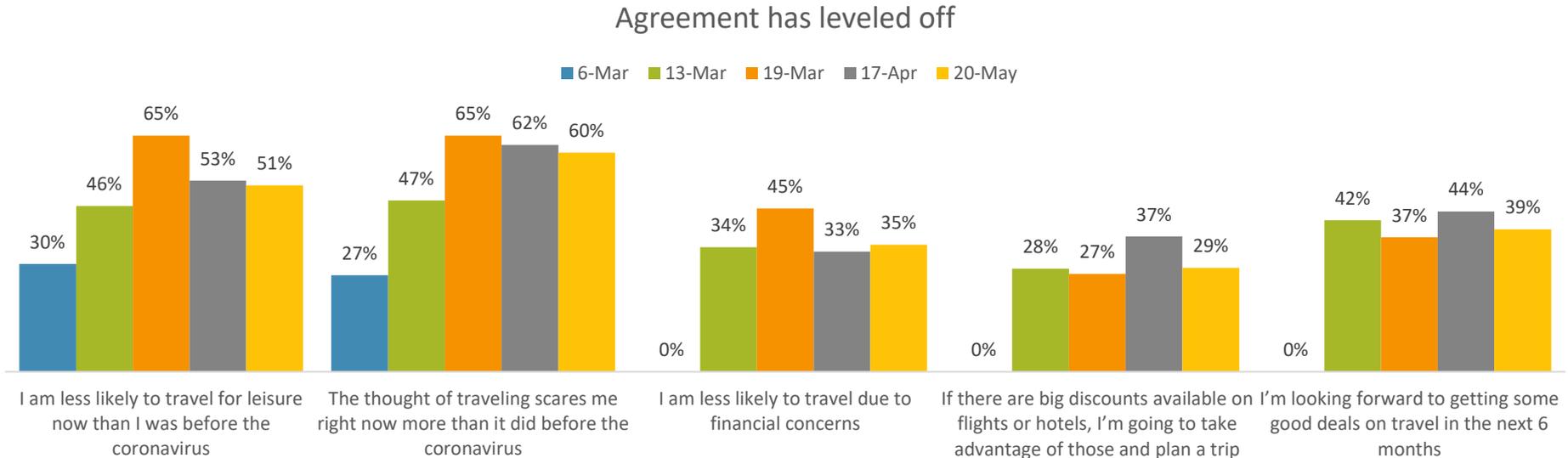


# Travelers' economic situations are continuing to level off, and views toward DMO advertising are returning to normal.



How much do you agree with the following statements? (Top 2 box agreement on 5-point scale)

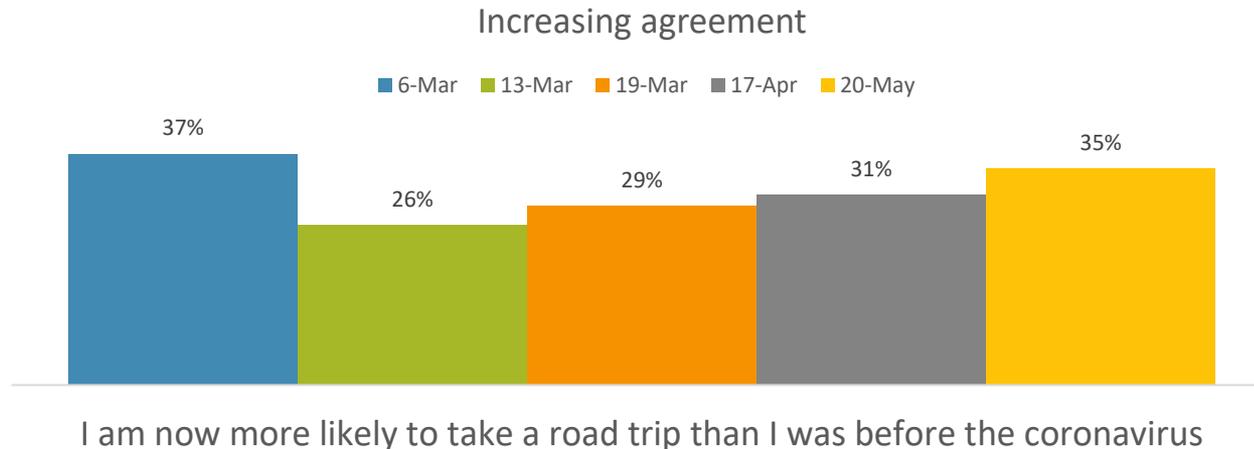
# Consumer sentiment relative to likelihood to travel at all, fear of travel, and travel deals has leveled off after peaking in mid-March (mid-April for travel deals).



How much do you agree with the following statements? (Top 2 box agreement on 5-point scale)

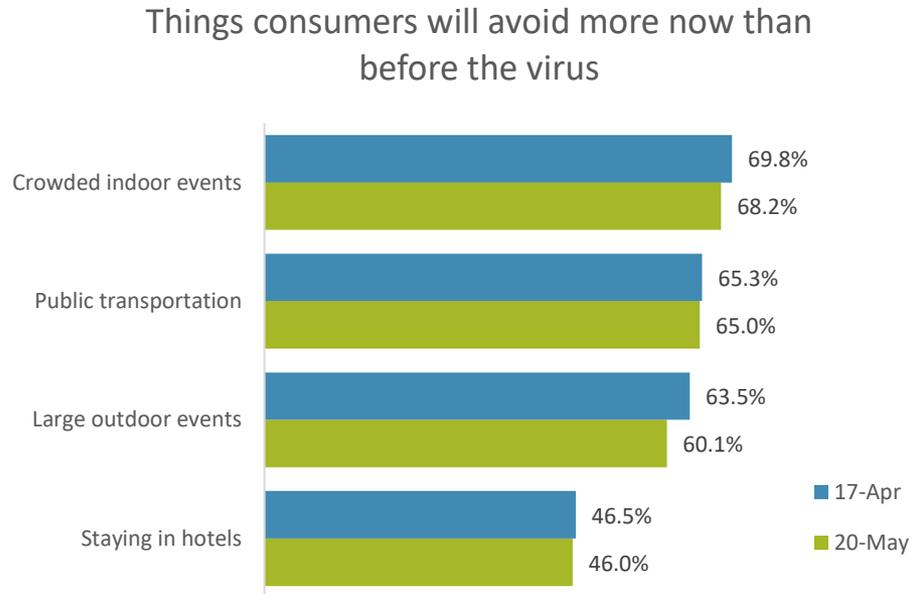
# As outlooks continue to improve, more consumers are looking forward to taking road trips.

- After seeing consumers swarm to beaches and lakes over the Memorial Day weekend, it would appear that road trips could be the key to recovery for summer 2020 travel – both for destinations and for travelers. These trips may be replacing the trips that many consumers had planned and have canceled. This again underscores the importance of communicating safe ways to engage in leisure activities.

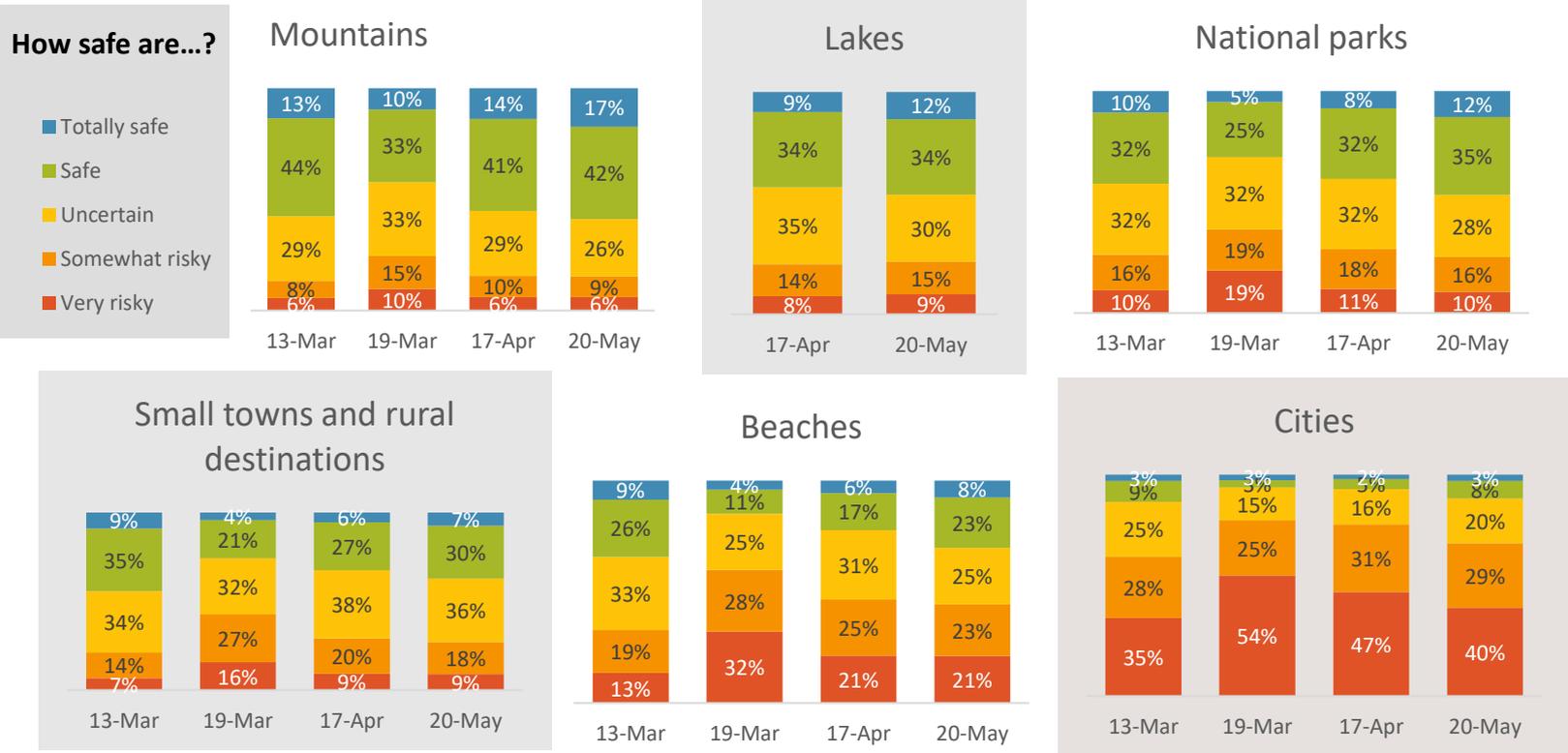


How much do you agree with the following statements? (Top 2 box agreement on 5-point scale)

In the past month, consumer views toward large gatherings, public transportation, and hotels have not changed significantly.



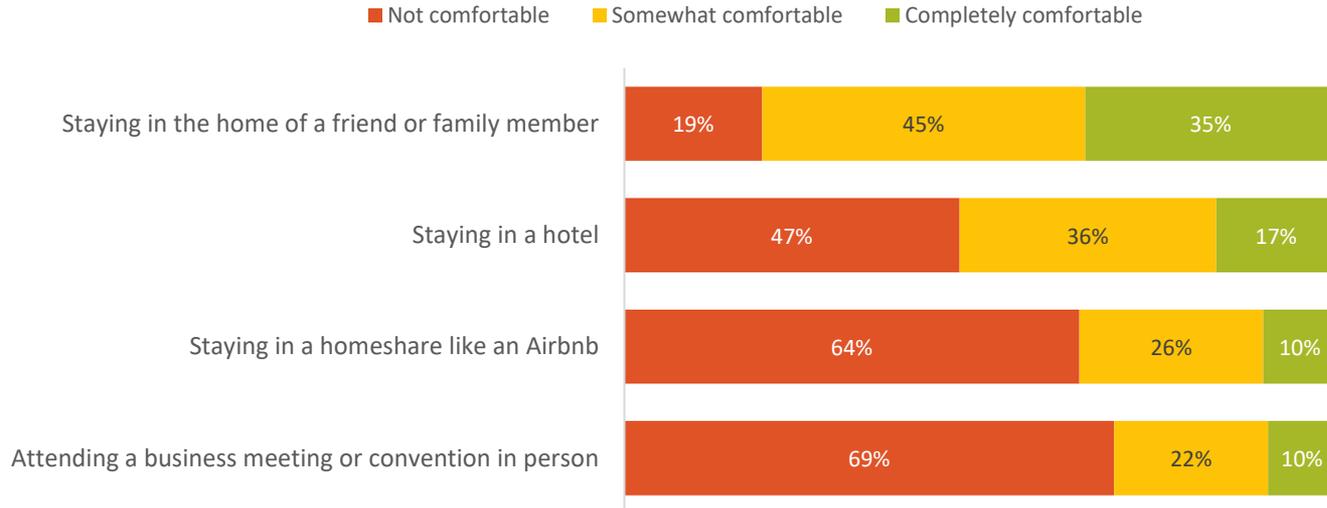
# Cities are seen as less risky than they were two months ago. Mountains, lakes, and national parks seem safer now.



# In terms of overnight lodging, travelers are most comfortable staying with friends/family.

- Comfort levels are higher with hotels than with homeshare.
- Consumers are not yet comfortable going to business meetings/conventions.

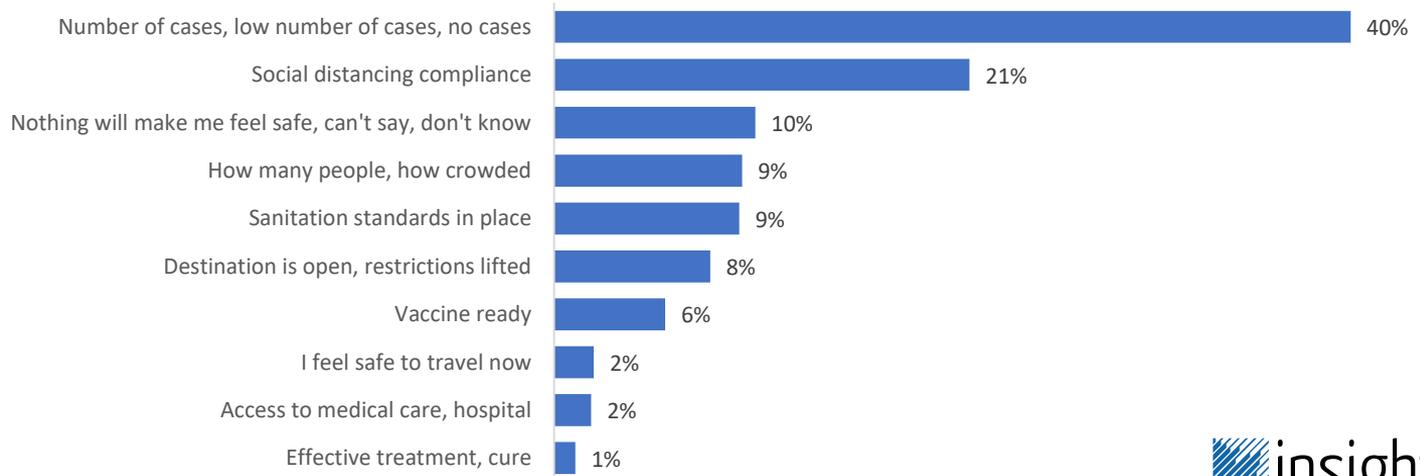
How comfortable are you...?



# Destination Messaging

- SMARInsights asked consumers in open-ended fashion what sort of markers they are looking for to signal when it is safe to return to a destination. Consumers want to know whether cases are prevalent in the destination or on the decline. A fifth of consumers want to know that social distancing is required.

What would you need to know about a destination to make you feel safe visiting there?

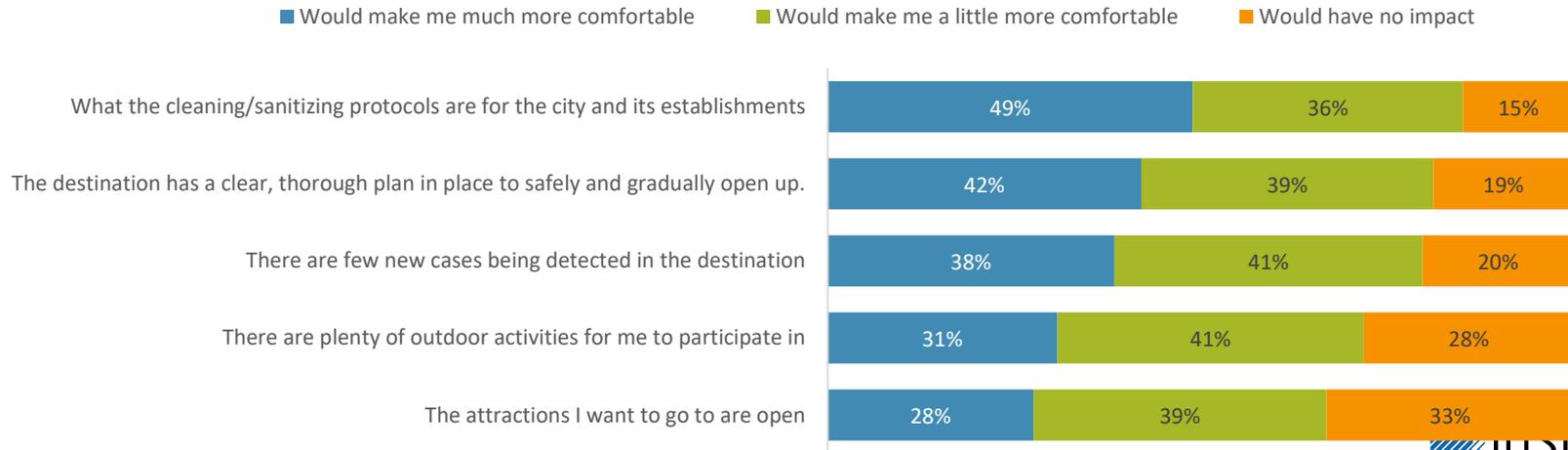


Coded open-ends representing 2% or more of responses.

# Destination Messaging

- Destinations can also put travelers at ease by communicating local cleaning protocols. Having a published re-opening plan in place can be effective.
- Outdoor activities and which attractions are open will help some consumers, but this information is not high priority.

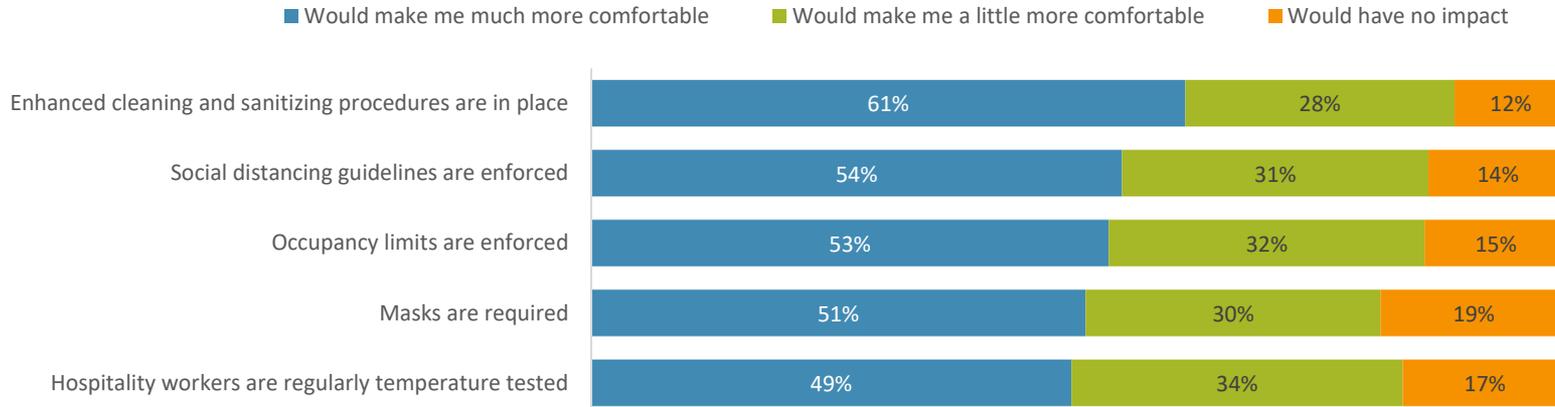
How would knowing each of these things about a destination make you feel about visiting?



# Partner Messaging

- As with the destination overall, individual business' cleaning procedures are comforting to travelers.
- More than half of travelers would be much more comfortable knowing that safety behaviors are required in individual businesses – including social distancing, face masks, and occupancy limits.

How would knowing each of these things about a particular business make you feel about visiting?



# Lodging Messaging

- SMARInsights asked consumers in open-ended fashion what would make them feel safe checking into a hotel. Four in 10 consumers want to know about precautions being taken at lodging facilities, including social distancing, mask requirements, and staff being tested. Additionally, 6% want to know the sanitizing procedures that are being followed.

What would you need to know to feel safe checking into a hotel?



Coded open-ends representing 2% or more of responses.