



Strategic Marketing and Research

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

April 17, 2020

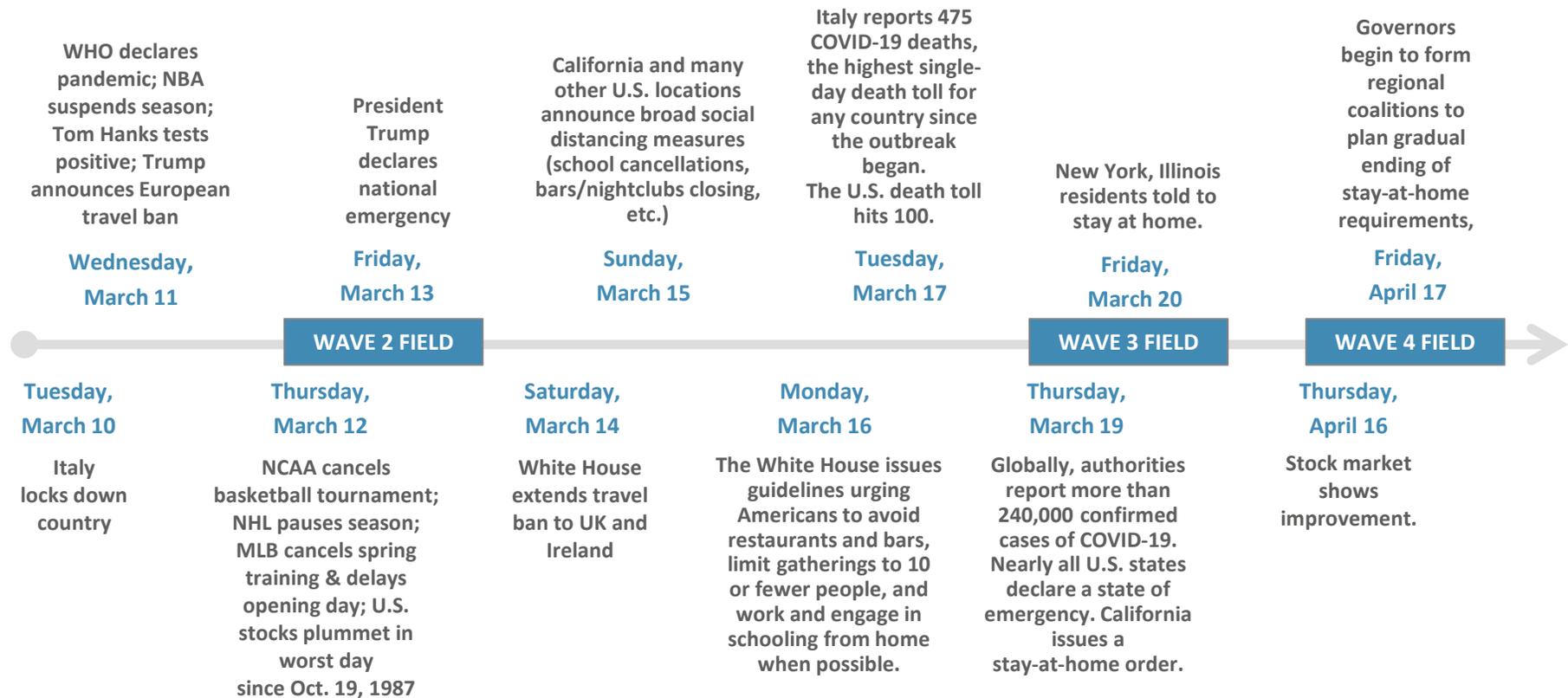
Key Findings

- This wave of research reflects the start of a more positive view of travel, while concerns about the economy remain. Travelers' views of leisure travel, indoor events, and hotels show signs of improvement. Travel cancellations are beginning to taper off, with trips through May having already been canceled or rescheduled.
- There is uncertainty about summer travel, and consumers are looking for guidance on how to determine if travel is safe. Year-end leisure and business travel plans remain untouched.
- When asked how their post-pandemic travel will differ from their typical travel habits, consumers generally say they will travel closer to home and will drive rather than fly.
- Destinations can be thinking about how to communicate to travelers the steps they are taking to manage visitors to ensure social distancing guidelines can be maintained. Consumers are open to hearing about sanitation and cleaning protocols as well.
- Messaging that generates future visit interest strikes a tone of empathy and hope, and expresses concern for travelers' well-being. The top-rated message types are:
 - We know it's not safe to travel right now, but we'll be here when you're ready
 - Virtual tours and experiences
 - Peaceful scenes of the destination
 - Messaging to potential visitors that their health and safety is important

Methodology

- The initial wave, fielded on March 5, 2020, surveyed 600 domestic leisure travelers from a national sample, 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
- The second wave, fielded March 12-13, surveyed 750 domestic leisure travelers from a national sample, using the same screening criteria as above. Data collection was completed prior to the president's press conference declaring a national emergency due to the coronavirus/COVID-19.
- The third wave fielded March 19-20 (data collection ended early on March 20, before any news broke for the day) using the same criteria and surveying 777 national travelers.
- The fourth wave fielded April 16-17 (data collection ended early on April 17, before any news broke for the day) using the same criteria and surveying 751 national travelers.
- Data were cleaned, coded, and prepared for analysis.

Timeline of Key COVID-19 Events

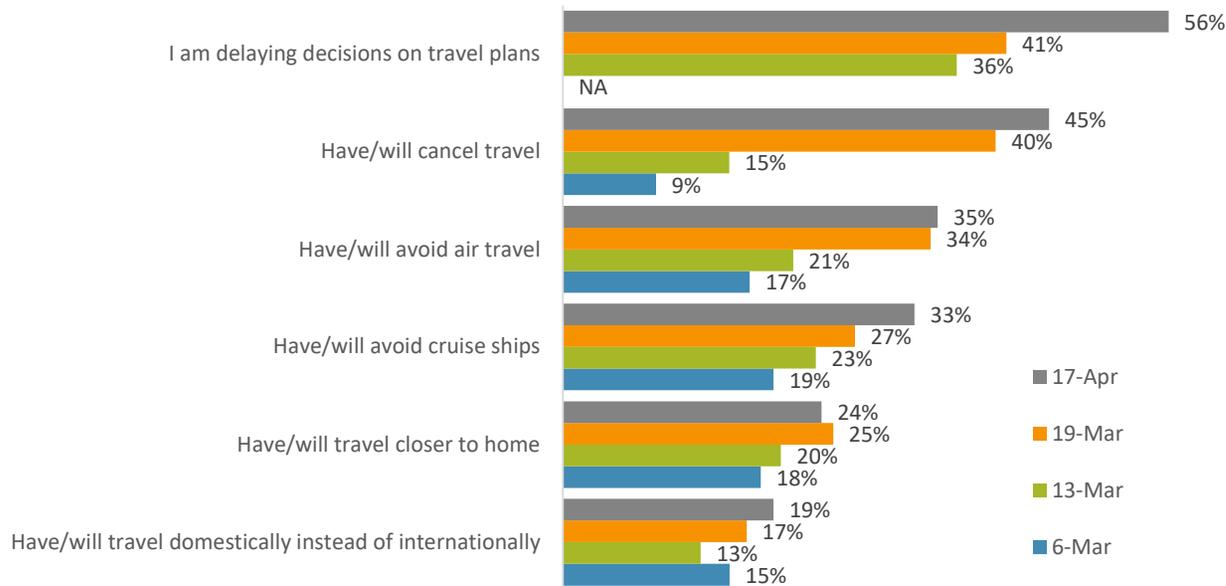


Domestic leisure traveler sentiment in light of coronavirus/COVID-19

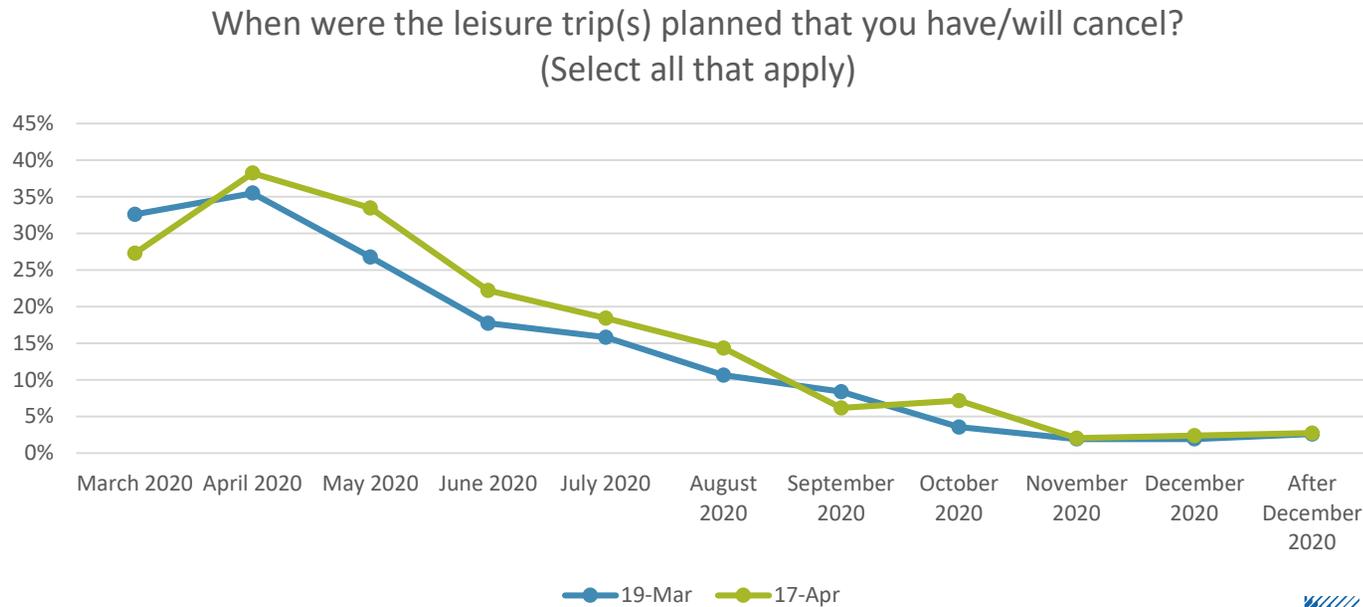
APRIL 17, 2020 REPORT

More than half of travelers are delaying decisions on travel plans.
 Many other metrics, including cancellations, are beginning to plateau.

How has/will the coronavirus influence your leisure travel plans?



Leisure trips planned for April through May are being canceled.
There is uncertainty about June-September trips.
End-of-year travel remains largely untouched.



A new question was added: 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?

Nearly a third of consumers are not thinking about leisure travel.

And almost as many are more likely to drive and to take trips closer to home.

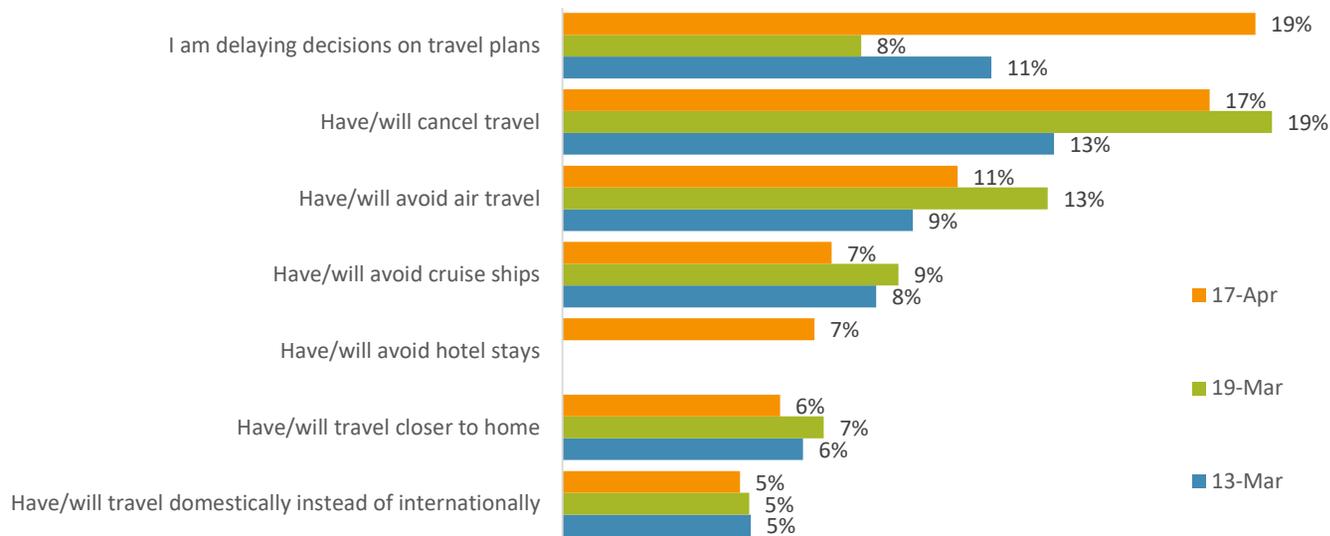
| % who agree with each statement | |
|--|-----|
| I can't even think about leisure travel right now | 30% |
| I think I will be more likely to drive than fly on leisure trips | 27% |
| I think I will be more likely to take trips closer to home | 24% |
| I don't think my leisure travel will be any different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

Those who say their leisure travel won't be any different than before tend to be Boomers and skew more male. Those with kids at home are less likely to agree with this statement.

Consumers could select multiple responses.

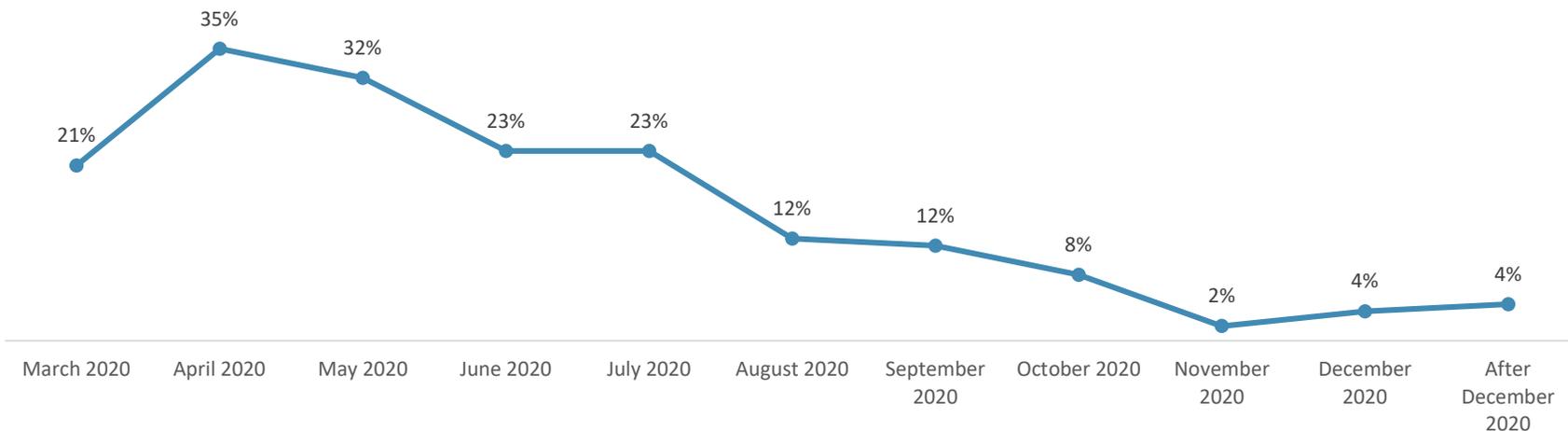
As with leisure travel, business travel decisions are being delayed. Cancellations and views toward air and cruise travel are beginning to show improvement.

How has/will the coronavirus influence your business/conference travel plans?



The range of dates for which business travelers have changed or canceled business trips looks very similar to the dates for altered leisure travel plans.

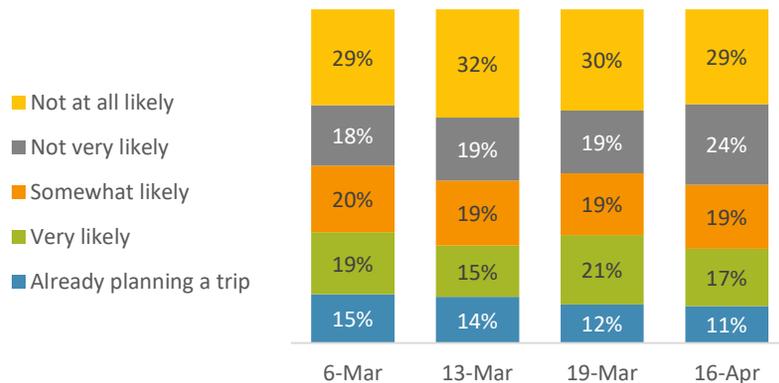
When were the business/conference trip(s) planned that you have/will cancel?



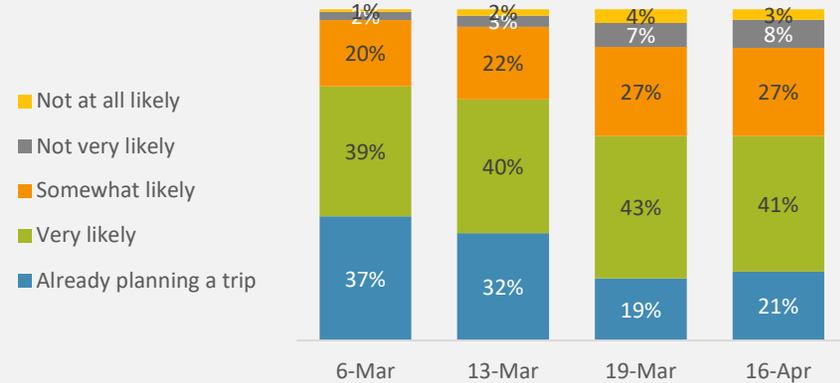
12-month planning window

- 12-month trip planning remains unchanged, and while those “already planning a trip” have leveled off at about a fifth of consumers, the shares of those very likely to travel domestically in the next year remains largely unchanged through the period we are tracking.

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

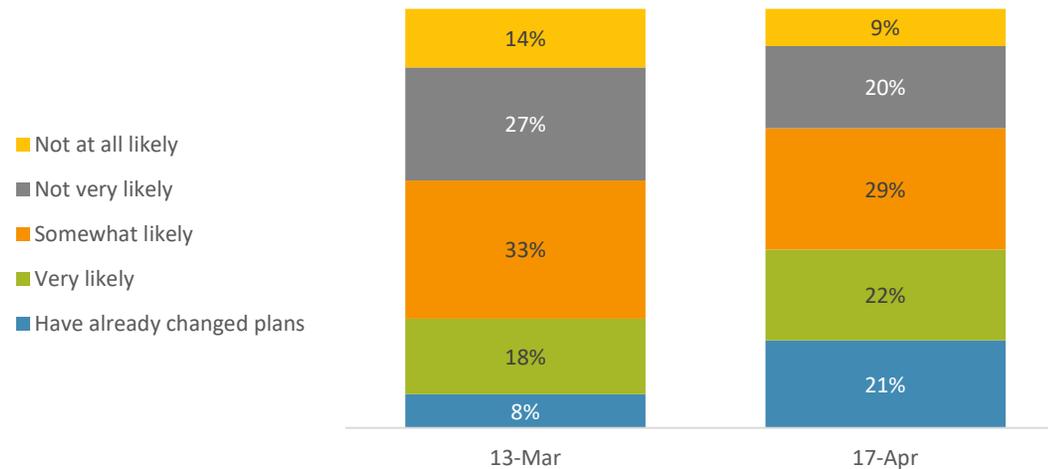


How likely are you to take a leisure trip in the U.S. in the next 12 months?



About a fifth of consumers have changed travel plans due to concerns about the economy.

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

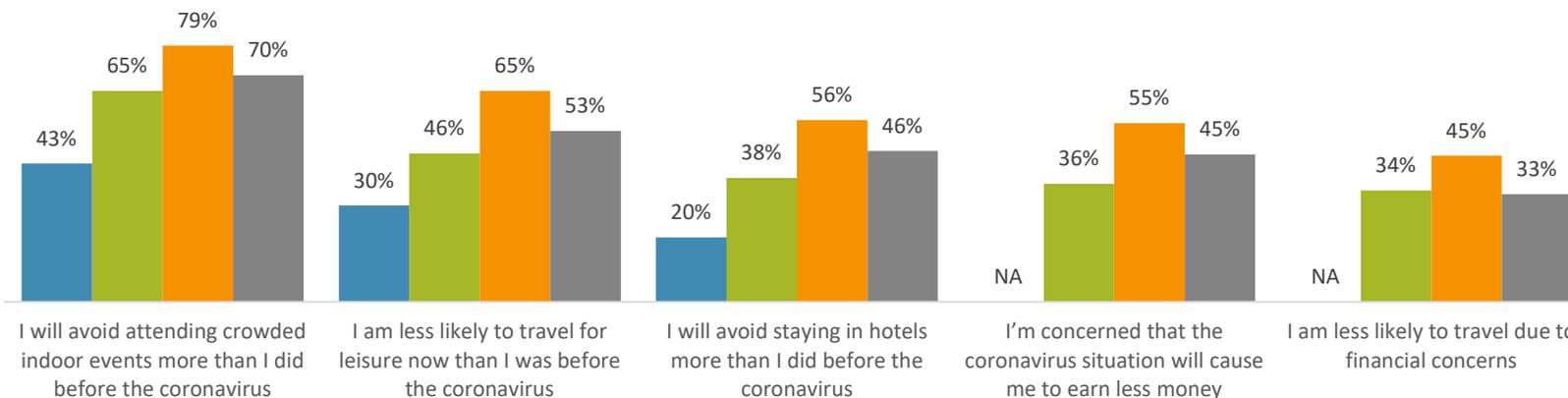


Travelers' views of leisure travel, indoor events, hotels, and their personal economic situations show signs of improvement.

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

Agreement is declining

■ 6-Mar ■ 13-Mar ■ 19-Mar ■ 17-Apr

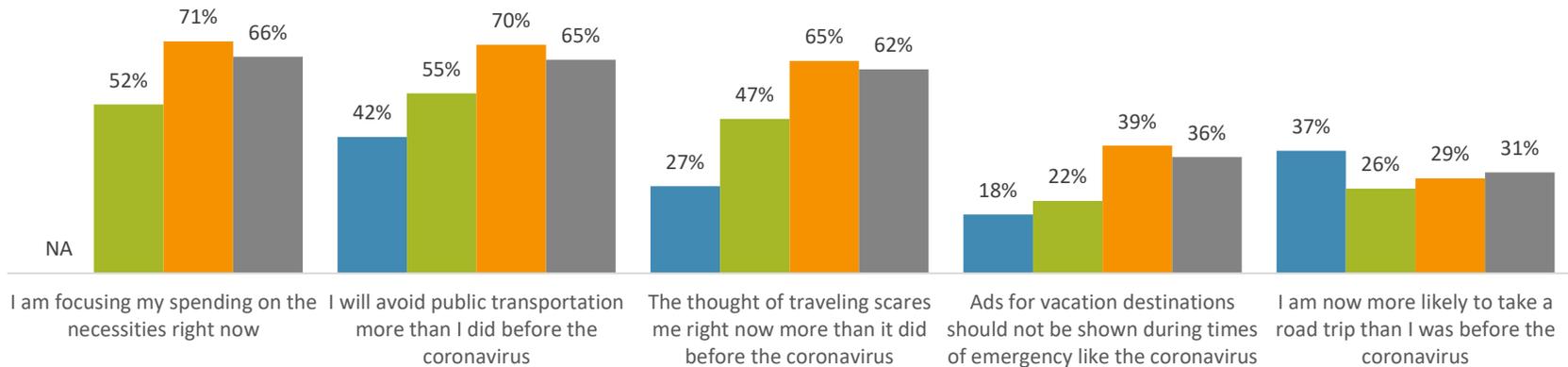


Consumer sentiment relative to these statements – including fear of travel and opinions on DMO advertising – is showing initial signs of improvement. There is growing interest in road trips.

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

Agreement is leveling off

■ 6-Mar ■ 13-Mar ■ 19-Mar ■ 17-Apr

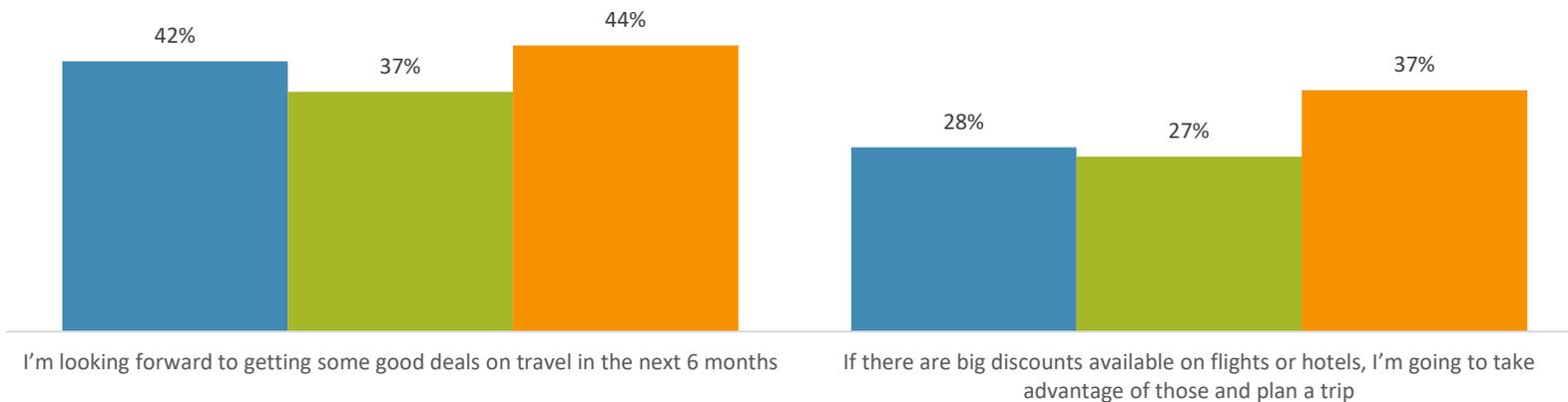


As outlooks begin to improve, more consumers are open to travel deals and discounts.

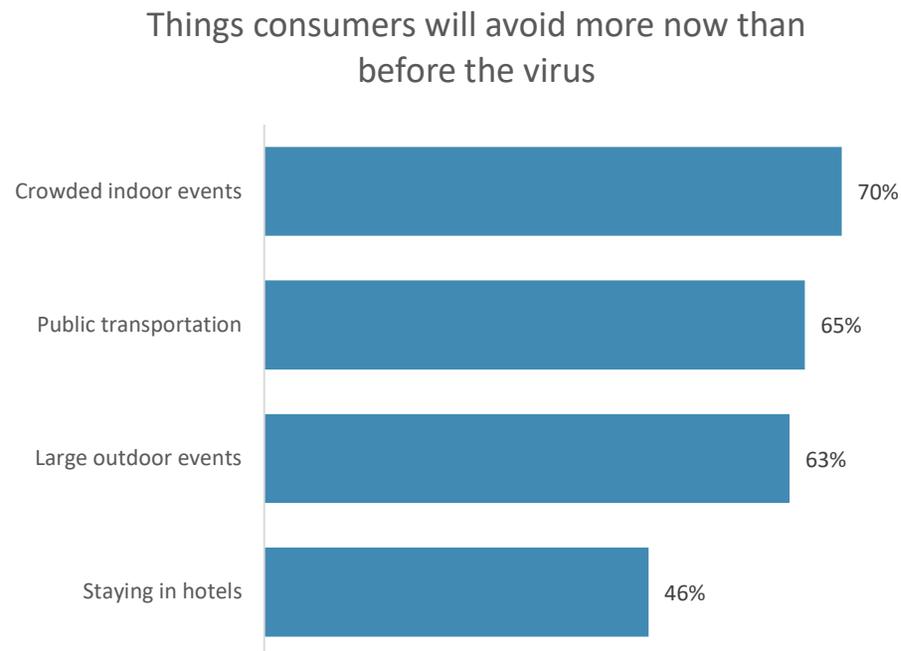
How much do you agree with the following statements? (Top 2 box agreement on 5-point scale)

Increasing agreement

■ 13-Mar ■ 19-Mar ■ 17-Apr



While views are improving, consumers remain concerned about large gatherings, both indoors and outdoors.



Travelers view all types of destinations as less risky this measure than they did in mid-March.



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

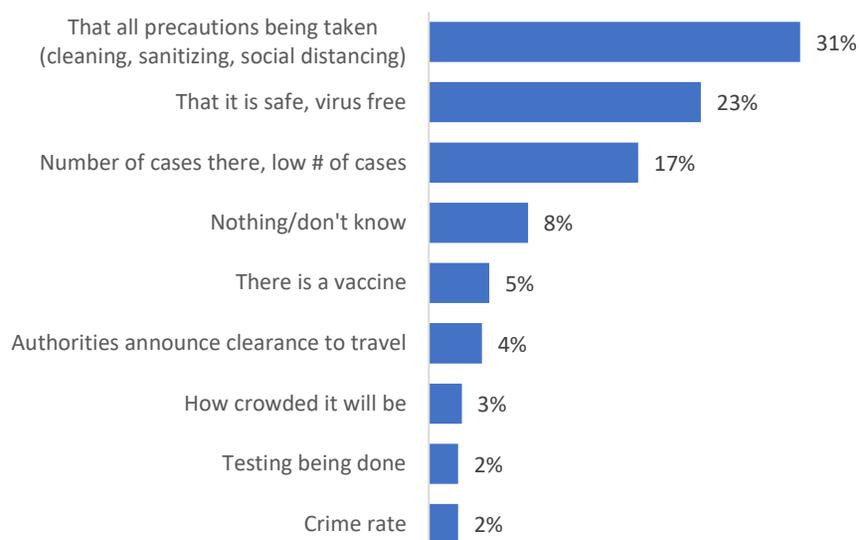
Scenic drives, hiking, and outdoor activities remain the top activities on consumers' minds. There is significantly higher likelihood to enjoy local cuisine in restaurants, shop at local stores, and visit museums, theaters, breweries, and downtown areas on leisure trips.

| Keeping the coronavirus in mind, which of these activities or experiences are you more likely to participate in on a vacation? | 13-Mar | 19-Mar | 17-Apr |
|--|------------|------------|------------|
| Taking a drive with scenic views | 52% | 53% | 40% |
| Going on a hike | 40% | 42% | 33% |
| Participating in outdoor activities | 27% | 28% | 32% |
| Indulging in local cuisine and restaurants | 19% | 13% | 31% |
| Shopping at local, independent stores and boutiques | 16% | 12% | 23% |
| Relaxing in a cabin or vacation rental | 34% | 32% | 22% |
| Visiting museums or attractions | 10% | 7% | 15% |
| Attending theater or concerts at small venues | 6% | 5% | 11% |
| Going to a brewery or out for cocktails | 8% | 6% | 10% |
| Exploring a vibrant downtown area | 7% | 6% | 10% |
| Staying in a hotel in a city center | 9% | 8% | 9% |
| Participating in an outdoor festival | 6% | 6% | 9% |
| Going to a spa | 6% | 7% | 6% |
| Participating in an immersive activity with other people where you have a new experience or learn something different | 4% | 5% | 5% |
| Going to art galleries or studios | 3% | 5% | 5% |
| Taking a sightseeing tour on a bus or trolley | 5% | 4% | 5% |

Respondents could choose up to three activities.

SMARInsights asked consumers what sort of markers they are looking for to signal when it is safe to return to a destination. A third of consumers welcome information on the precautions that destinations are taking to manage social distancing, cleaning, and sanitizing. Nearly a quarter want reassurance in the form of numbers of confirmed cases.

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.

Messaging Research

- As state and national leaders discuss metrics to determine when and how it will be safe for communities to begin resuming business activities, destinations are preparing for the point at which leisure travel advertising can also resume. Therefore, in this wave of research, SMARInsights added a number of questions to explore consumer views toward leisure travel and destination messaging that has already been in the market, largely in the form of social media posts.
- SMARInsights tested 10 types of messages, including two hashtags and one video. Respondents were shown the text descriptions and examples. Messages were randomized. The following are illustrations of the message types tested.

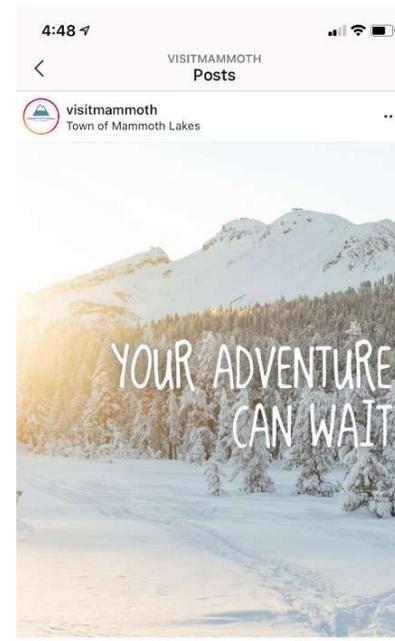
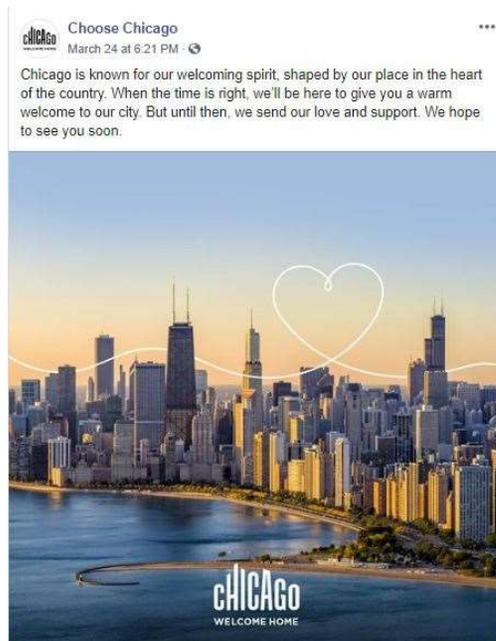
Messaging #1: Stay away

In response to the coronavirus and containment measures, some destinations are asking potential visitors to stay away until it is safe to travel.



Messaging #2: We'll be here when you're ready

Some destinations are reassuring consumers with messaging that says, "We know it's not safe to travel now – but we'll be here when you're ready."



Messaging #3: How we're helping the community

Some destinations are saying to consumers, "This pandemic has created hardships here and elsewhere. We care about our community and these are the kinds of actions we are taking to help local residents during this challenging time."



Messaging #4: Virtual tours

Even though you can't visit in person right now, many destinations still want to welcome you and are offering virtual tours you can take of museums and attractions here while you're at home.

Choose Chicago
March 27 at 2:58 PM

Museums: ✓
Architecture: ✓
Attractions: ✓

Enjoy all that Chicago has to offer from the comfort of your own home!



CHOOSECHICAGO.COM
Experience Chicago online: Virtual tours & digital experiences | Choose Chicago

VISIT FLORIDA
March 30 at 5:00 PM

Happy National Virtual Vacation Day! Grab your princess dress and crown and turn your living room into a 'Magic Kingdom' with these seven tips from Travel + Leisure. #LoveFL



TRAVELANDLEISURE.COM
7 Ways to Bring the Disney Magic Home While the Parks Are Closed

Pure Michigan
March 24 at 3:45 PM

Embark on a behind-the-scenes journey to see the Detroit Institute of Arts as you never have before. Discover how the DIA uses science and technology to learn more about their world-class collection of art.

We hope you'll continue to travel along with us in the coming days and weeks as we 'virtually' explore destinations and experiences throughout #VirtualPureMichigan. From our family to yours, stay safe, healthy and inspired!



PBS.ORG
DPTV Education | D.I.A. Virtual Field Trip
What lies behind the surface of a 400-year-old sculpture?

Messaging #5: Create the destination experience at home

Even though you can't visit in person right now, here is a recipe or guide so you can re-create an element of this destination's experience yourself.

ESCAPE TO PUERTO RICO VIRTUALLY!

VIRTUAL SALSA LESSON
FRI, MAR 27 - 8:00 PM ET
ZOOM MEETING
TITO ORTOS & TAMARA LIVOLSI

COCKTAIL MIXING CLASS
SAT, MAR 28 - 7:00 PM ET
INSTAGRAM LIVE
LA FACTORIA BAR'S ROBERTO BERDECIA

COOKING CLASS
SUN, MAR 29 - 7:00 PM ET
INSTAGRAM LIVE
CHEF WILO BENET

DISCOVER *Puerto Rico*

Visit Las Vegas
March 23 at 6:27 PM

Our friends over at Chippendales are ready to help you break a sweat. 🥵
TMZ has the details. #OnlyYou #OnlyVegas #TogetherAtHome

Chippendales
March 21 at 8:38 PM

Let's stay in shape together! Join in on our free in-home Chippendales workout routines! 🥵 TMZ has the exclusive!
Featuring Blue Diamond Almonds Breeze gallon weights 🥰

TMZ.COM
Vegas Chippendales Dancers Offer Sexy In-Home Workout Routines Learn More

South Carolina @Discover_SC · 2h

These hand-crafted cocktails are distinctively delicious, and we can't wait for you to try them. Dream now and discover later with the 2020 South Carolina Vacation Guide. bit.ly/MixItUpSC #DiscoverSC #TravelTuesday

4

Messaging #6: Find things to do here at a later date

Some destinations are inviting consumers to find things they want to do at a later date.



Messaging #7: Relaxing scenes of the destination

Some travel destinations are simply sharing relaxing or Zen-like scenes of their places.



Messaging tested, #8-10

DESCRIPTION 8 – #TRAVEL SOMEDAY: One day the novel coronavirus will recede and those who love to explore the world can head out to travel again. So, start planning your future travels now. There's never been a better time to get ready to search the world over when it is safe to get out there again.

DESCRIPTION 9 – #ThroughMyWindow: Residents of cities such as Paris, New York, San Francisco, and Los Angeles are using this hashtag to share their views from home, including local landmarks and natural beauty. It's a way to promote tourism by keeping a sense of wanderlust alive because, when this is over, these cities will again be ready to welcome the world.

DESCRIPTION 10 – “The only thing that matters to us is... YOU.” #OnlyYouVideo <https://youtu.be/3x0QVlKjRE>

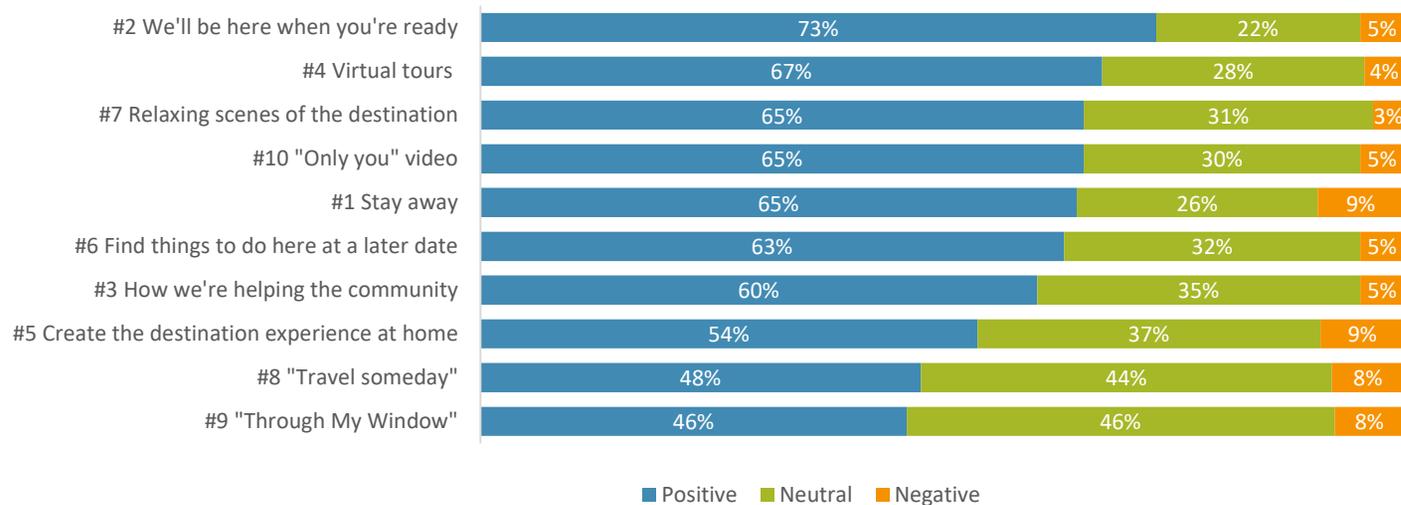
- Data on how consumers responded to each of these messages is presented on the following pages.

Consumers respond most positively to messaging that strikes an empathetic, hopeful tone:

We know it's not safe to visit right now, but we'll be here when you're ready.

- Consumers also liked virtual tours, relaxing scenes of leisure destinations, and the video where the destination communicated concern for travelers' safety and best interests.

What is your overall reaction to this type of messaging?



“We’ll be here when you’re ready,” virtual tours, and peaceful scenes generate the most interest in a future visit. “Through My Window” is a hashtag and did not have images with it, so while it is similar to “We’ll be here when you’re ready,” it does not rate as high.

| How much do you agree that this type of messaging would make you want to visit a destination once it is safe to travel? | |
|---|------|
| #2 We'll be here when you're ready | 3.75 |
| #4 Virtual tours | 3.72 |
| #7 Relaxing scenes of the destination | 3.70 |
| #10 "Only you" video | 3.66 |
| #6 Find things to do here at a later date | 3.65 |
| #1 Stay away | 3.58 |
| #3 How we're helping the community | 3.49 |
| #5 Create the destination experience at home | 3.44 |
| #8 "Travel someday" | 3.40 |
| #9 "Through My Window" | 3.34 |

Mean ratings on a 5-point scale where 5=strongly agree and 1=strongly disagree.

Virtual tours, the video, “We’ll be here when you’re ready,” and “Stay away” are the best at differentiating a destination.

| How much do you agree that this type of messaging would make a destination stand out compared to others who are not doing similar messaging? | |
|--|------|
| #4 Virtual tours | 3.76 |
| #10 "Only you" video | 3.75 |
| #2 We'll be here when you're ready | 3.74 |
| #1 Stay away | 3.72 |
| #7 Relaxing scenes of the destination | 3.67 |
| #6 Find things to do here at a later date | 3.61 |
| #3 How we're helping the community | 3.56 |
| #5 Create the destination experience at home | 3.49 |
| #8 "Travel someday" | 3.36 |
| #9 "Through My Window" | 3.34 |

Mean ratings on a 5-point scale where 5=strongly agree and 1=strongly disagree.

“We’ll be here when you’re ready” and the “only you” video are the strongest at generating positive feelings about leisure destinations. Videos typically rate higher and are more complete ways to communicate with consumers, so its high rating is not surprising.

| How much do you agree that this type of messaging would make you feel better about a destination? | |
|---|------|
| #2 We'll be here when you're ready | 3.78 |
| #10 "Only you" video | 3.74 |
| #4 Virtual tours | 3.69 |
| #7 Relaxing scenes of the destination | 3.68 |
| #1 Stay away | 3.66 |
| #6 Find things to do here at a later date | 3.64 |
| #3 How we're helping the community | 3.57 |
| #5 Create the destination experience at home | 3.41 |
| #8 "Travel someday" | 3.39 |
| #9 "Through My Window" | 3.31 |

Mean ratings on a 5-point scale where 5=strongly agree and 1=strongly disagree.

“Stay away” and “We’ll be here when you’re ready” are viewed as the most responsible messaging.

| How much do you agree that this type of messaging is the responsible thing to do? | |
|---|------|
| #1 Stay away | 4.07 |
| #2 We'll be here when you're ready | 3.97 |
| #10 "Only you" video | 3.95 |
| #4 Virtual tours | 3.88 |
| #3 How we're helping the community | 3.81 |
| #6 Find things to do here at a later date | 3.76 |
| #7 Relaxing scenes of the destination | 3.71 |
| #8 "Travel someday" | 3.59 |
| #9 "Through My Window" | 3.57 |
| #5 Create the destination experience at home | 3.55 |

Mean ratings on a 5-point scale where 5=strongly agree and 1=strongly disagree.

Top-performing DMO messaging types during this phase of the pandemic

| How much do you agree that this type of messaging...? | Would make you want to visit a destination once it is safe to travel | Would make a destination stand out compared to others who are not doing similar messaging | Would make you feel better about a destination | Is the responsible thing to do |
|---|--|---|--|--------------------------------|
| #2 We'll be here when you're ready | 3.8 | 3.7 | 3.8 | 4.0 |
| #10 "Only you" video | 3.7 | 3.8 | 3.7 | 3.9 |
| #4 Virtual tours | 3.7 | 3.8 | 3.7 | 3.9 |
| #7 Relaxing scenes of the destination | 3.7 | 3.7 | 3.7 | 3.7 |

Mean ratings on a 5-point scale where 5=strongly agree and 1=strongly disagree.

Looking toward the future

This wave of research saw the beginnings of a more positive attitude, and there is discussion among states as to the timing for loosening restrictions. The survey explored whether there are people right now who are ready to travel – and who they are.

- 12% of the consumers indicate that they are not going to restrict their travel behavior and are already beginning to plan for travel. This audience is anticipating deals and discounts and are willing to fly and stay in hotels.
- This audience has higher income, slightly higher education, and are older (average age 49). They are not defined by marital status or children in the household.
- They are more likely to come from Southern and Midwestern states, and much less likely to come from either East or West Coast states.
- This audience will be the first to travel and should be considered as destinations begin to think about marketing in the future.