

Tourism Coffee Hour

September 2, 2020

Will Cronin

MSU Extension

We will
start at
10:05!



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mail:

U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or

fax:

(833) 256-1665 or (202) 690-7442;

email:

program.intake@usda.gov.

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program.intake@usda.gov.

Esta institución ofrece igualdad de oportunidades.

Agenda

- 10:00: Welcome and Introductions
- 10:10: Short Presentation: Covid-19's impact on tourism, current trends
- 10:35: Discussion
- 11:00: Adjourn



Introductions!



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COVID-19 Travel Insights

Independent and Unbiased Data is Your Most Powerful Asset Right Now

Destination Analysts is tracking and publishing key consumer perceptions, attitudes and behaviors through **unbiased, expert-designed research**, in order to help the travel, tourism and hospitality industries form strategy and communicate through the COVID-19 crisis. As an **independent, third-party research company**, you can trust that the information we provide you is not motivated or directed by any advertising or marketing agency.

- Coronavirus Travel Sentiment Index Report
- Shareable Media & Infographics
- Latest Key Findings & Things to Know
- Webinar Resources & Registration

<https://www.destinationanalysts.com/covid-19-insights/>

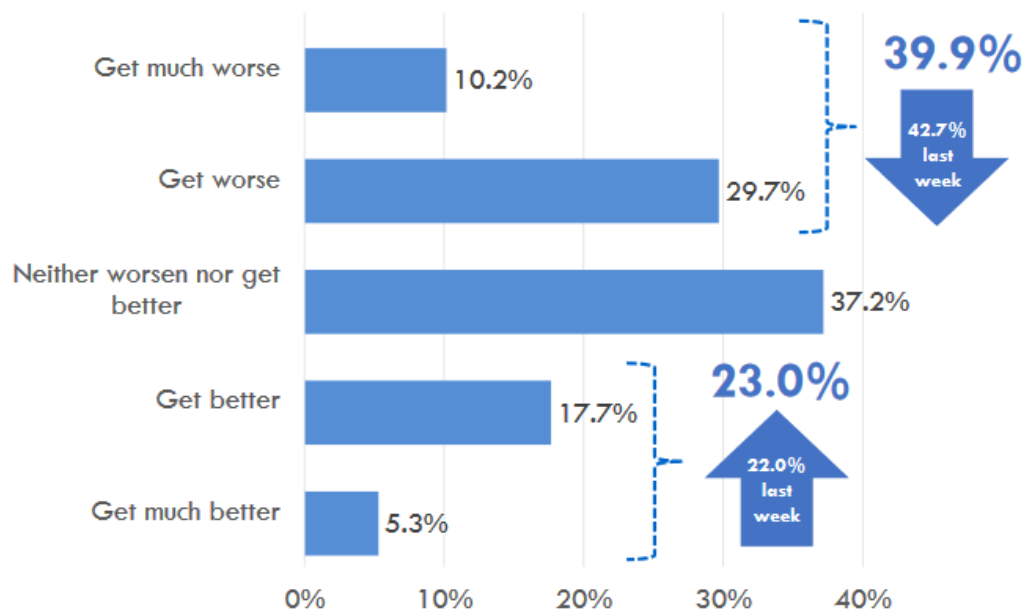


Expectations for the Coronavirus Outbreak

American travelers recorded another measured gain in optimism about the pandemic's course.

- This week, 23.0 percent feel the situation in the United States will improve in the next month and 37.2 percent think it will stay the same. While 39.9 percent continue to think it will get worse, this is down markedly from 53.7 percent one month ago.
- The proportion of American travelers with high degrees of concern for their personal and friends/family's safety against the virus has dropped back to June levels after being heightened over the last two months while cases surged.
- However, concerns about the virus' impact on their personal finances strengthened (60.2% are highly concerned, up from 56.0% last week).

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 25. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)



Americans' Travel State-of-Mind

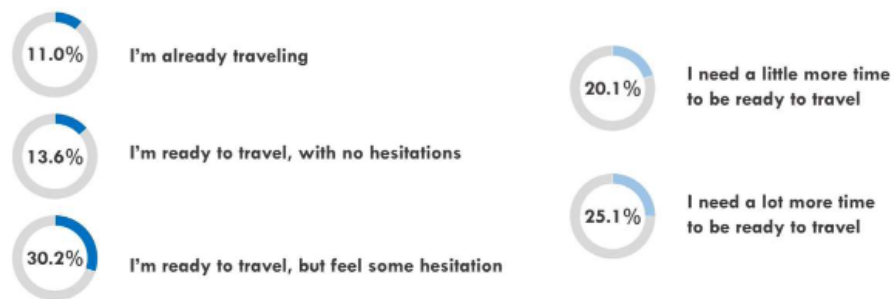
When considering travel, the perception of travel activities as unsafe is the lowest it has been since June 15th.

Americans have also demonstrated improvement in their state of mind around travel readiness—over half feel in a readiness mindset versus needing more time to feel up to consider it. For the near-term, excitement to take a potential getaway in the next month and openness to travel inspiration levels increased for the second week in a row, and Fall travel expectations improved to 35.9% from a low of 29.8% last week.

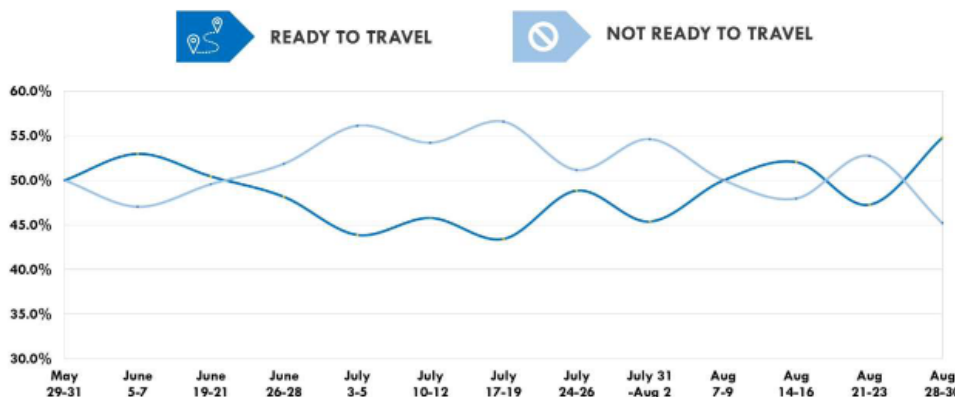
Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (select one)

(Base: Wave 12-13 and 15-25. All respondents, 1,257, 1,214, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,207, 1,250 completed surveys. Data collected May 29-31, June 5-7, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9, 14-16, 21-23 and 28-30, 2020)

AMERICANS' TRAVEL STATE-OF-MIND AS OF AUGUST 30TH



HISTORICAL DATA



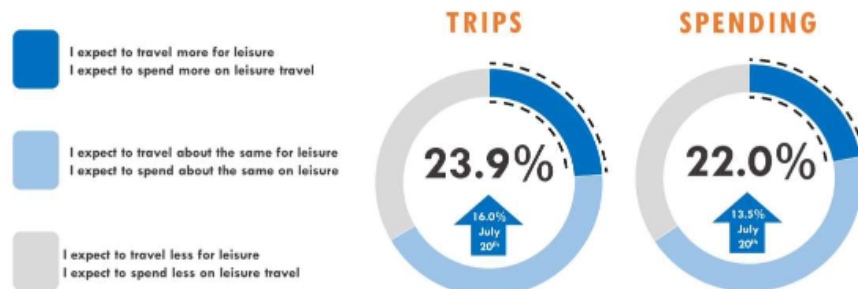
Travel in the Next Twelve Months

As they look out over the next 12 months, Americans continue to demonstrate greater optimism about their travel future.

- Now, 43.0% of American travelers say that leisure travel will be at least a somewhat high priority in their personal budget, up from 34.7% just six-weeks ago.
- Fortunately, a majority of American travelers say the pandemic has not negatively impacted the disposable income they have available for travel (62.7%). In fact, reported annual budgets for leisure travel have increased to an average of \$3,258 from \$2,721 in July.
- However, with over a third of American travelers and concerns about the virus impact on finances still elevated, American travelers are indeed planning on being more budget conscious on their trips than they were prior to the pandemic.

(Base: Wave 25. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

TRAVEL IN THE NEXT TWELVE MONTHS:



43.0% feel that leisure travel spending will be a **high priority.**



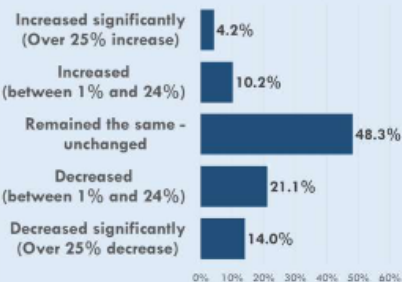
24.8% will spend more than **\$4,000** on leisure travel.



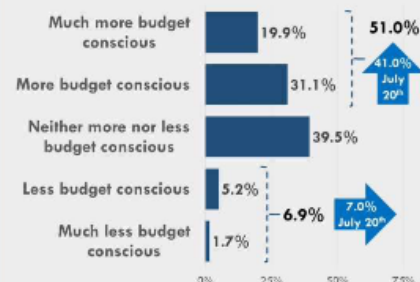
31.2% will spend less than **\$500.**



"MY HOUSEHOLD'S DISPOSABLE INCOME AVAILABLE FOR TRAVEL HAS _____"



"I WILL LIKELY BE _____"

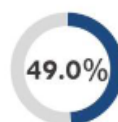


Coronavirus-Caused Trip Cancellations

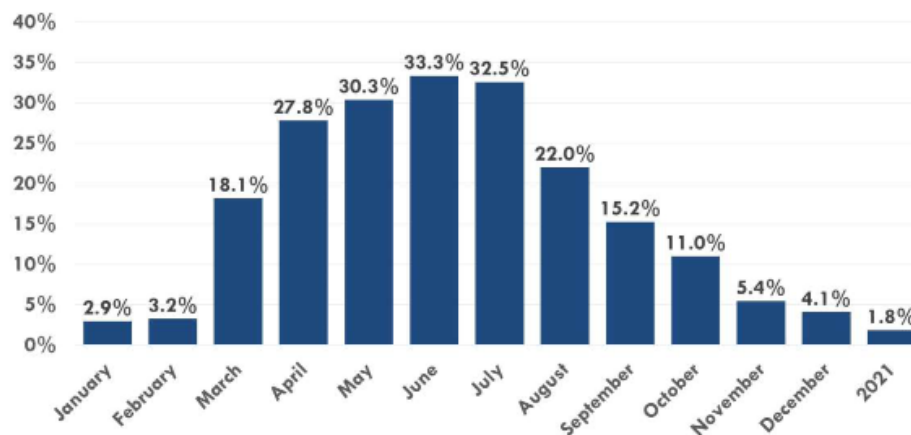
Although sentiment is turning more positive, the pandemic is nevertheless still impacting travel at a high rate--**49% of American travelers have cancelled a trip due to COVID-19--with concerns about personally contracting the virus the primary driver for abandoning travel plans.**

The peak summer period bore a particularly significant share of the scrapped trips.

CORONAVIRUS-CAUSED TRIP CANCELLATIONS AS OF AUGUST 30TH



of American travelers have cancelled a trip due to the COVID-19 Pandemic. These travelers have cancelled **2.1** trips on average.



Question: The Trip(s) you canceled would have taken place in which months? (Select all that apply)

(Base: Wave 25. Respondents cancelling a trip, 636 completed surveys. Data collected August 28-30, 2020)

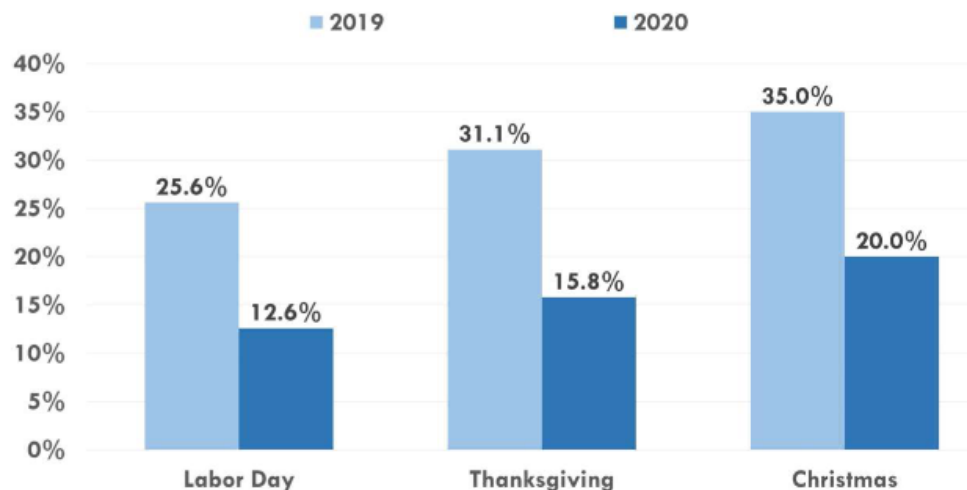


Travel for Fall/Winter Holidays

In addition, trips for the upcoming national Labor Day and Thanksgiving holidays currently look to be off by half relative to 2019.

Americans' travel plans for the Christmas holiday also appear to be muted relative to last year.

TRAVEL FOR FALL/WINTER HOLIDAYS 2019 VS. 2020 (EXPECTED)



Question: Please tell us about your travel LAS YEAR (2019). On each of these holidays, did you take a trip (of at least 50 miles one way) (Base: Wave 25. All respondents, 1,250 completed surveys. Data collected August 28-30, 2020)

Question: Will you be traveling for leisure over the Labor Day weekend/Thanksgiving Holiday/Christmas Holiday this year? (Base: Wave 23. All respondents, 1,202 completed surveys. Data collected August 14-16, 2020)

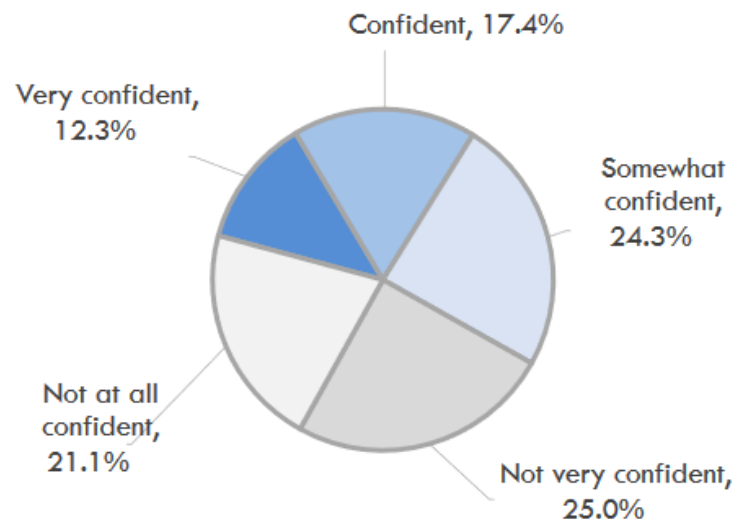


Confidence in Traveling Safely

Perhaps most importantly, Americans may need more information and assurances to move them to take trips, especially as the strong majority do not believe the pandemic will be resolved before the end of the year.

In total, 46.1% of American travelers report that they are “not very” or “not at all” confident that they can travel safely in the current environment. In comparison, 29.7% feel confident or very confident they can travel safely in the current environment.

TRAVELING SAFELY IN THE CURRENT ENVIRONMENT CONFIDENCE



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

(Base: Wave 25. All respondents, 1,250 completed surveys. Data collected Aug 28-30, 2020)

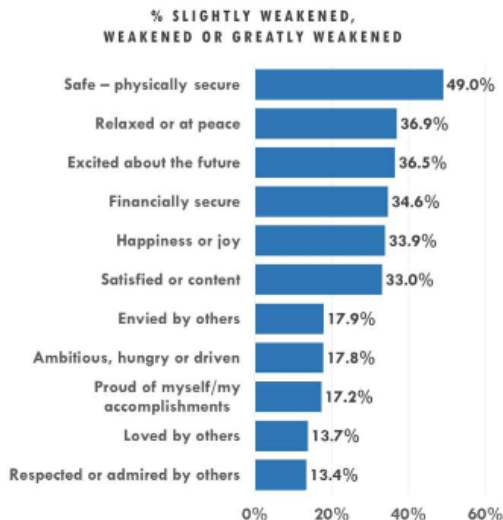


Desired Emotional States

When marketing travel right now, it's especially beneficial to consider travelers' emotional state, particularly those which they are most desiring of.

Right now, feelings of safety, financial security, happiness, peace of mind and satisfaction are most important to American travelers right now. Unfortunately, the pandemic has significantly weakened Americans sense of the latter three emotional states, as well as excitement about the future. But Americans see travel as a means to achieving their desired emotional states, with over a third of American travelers feeling that if they took a trip this year, the emotions most negatively impacted by the pandemic would strengthen.

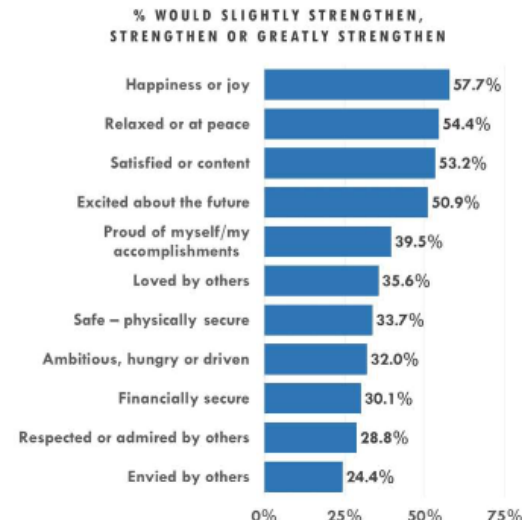
NEGATIVE IMPACT OF PANDEMIC ON DESIRED EMOTIONAL STATES



Question: In your daily life, how has the coronavirus pandemic affected your personal sense of each (select one for each)

The coronavirus pandemic has _____ how I feel this in my daily life.

TRAVEL'S CONTRIBUTION TO DESIRED EMOTIONAL STATES



Question: Finally, please think about how you think leisure travel would affect your feelings. If you were to take a vacation later this year, how would this affect your feelings? (select one to fill in the blank)

A vacation would _____ my feelings of this.

(Base: Wave 25. All respondents, 1,250 completed surveys. Data collected August 28-30, 2020)



Marketing Channels Travelers Feel Most Receptive To

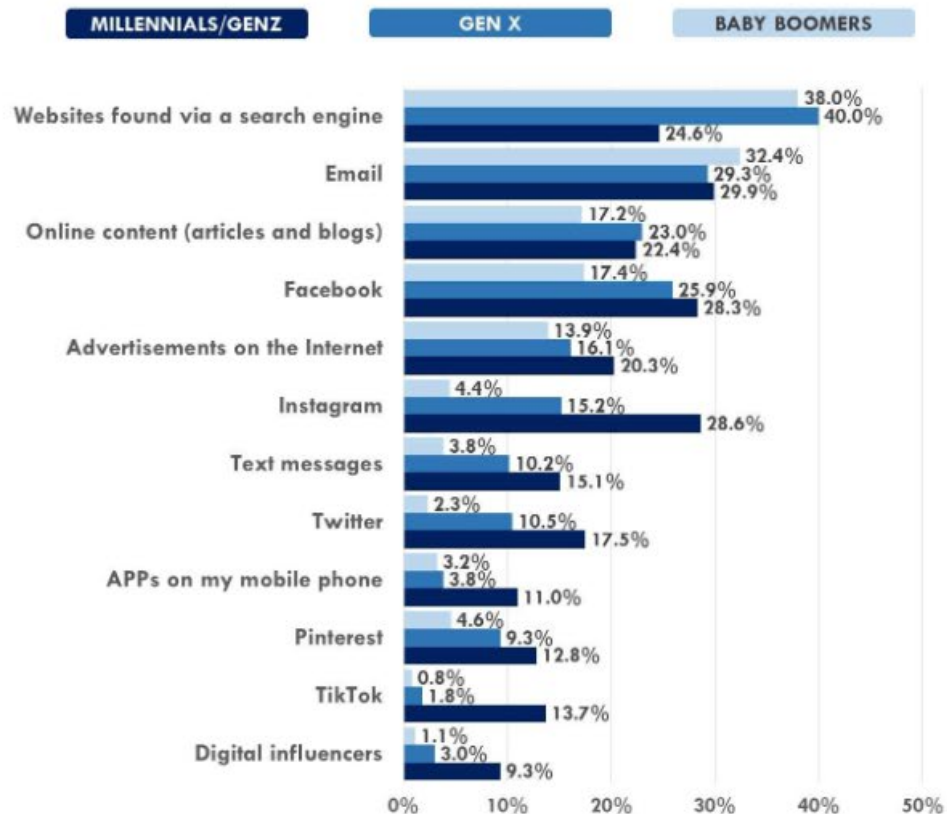
When asked how travel marketers could best reach them, email is productive across all generations.

Gen X and Boomers appear particularly receptive to search engine marketing right now, while Millennial and younger travelers like travel marketing via Facebook and Instagram.

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 destination to visit? (Please select all that apply)

(Base: Wave 25. All respondents, 1,250 completed surveys. Data collected August 28-30, 2020)

MARKETING CHANNELS TRAVELERS FEEL MOST RECEPTIVE TO



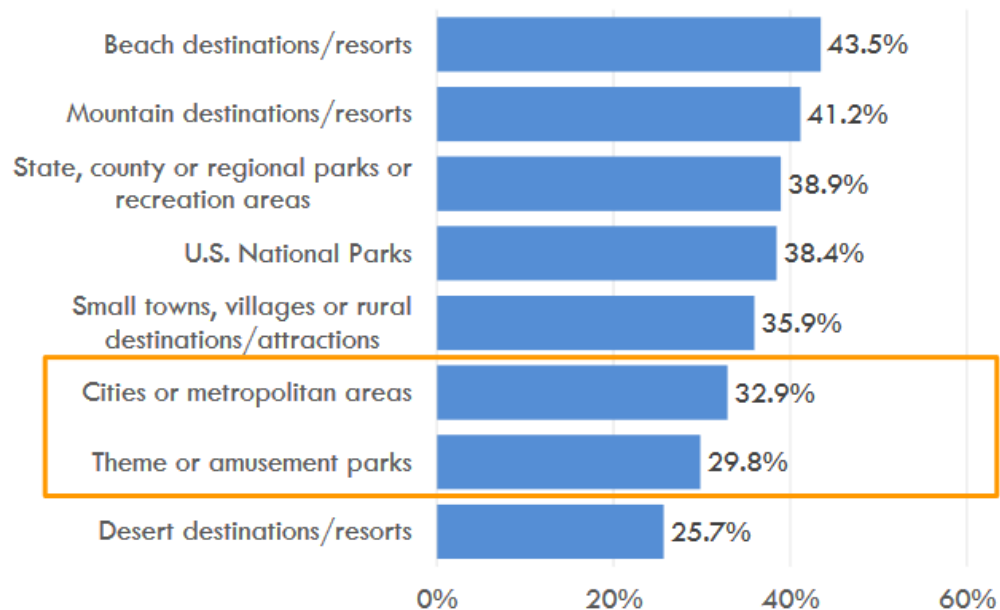
Destination Excitement

As for what types of destinations that have the highest likelihood of generating excitement right now, Americans with trips planned for the remaining 4 months of 2020 showed the most enthusiasm for beaches and mountains—the latter notably higher than what was typical pre-pandemic*.

While excitement about cities and theme park destinations still exists, enthusiasm for these destination types is farthest off from pre-pandemic norms, at least for the rest of 2020.

Note: Our latest findings on aspiration for ski/snow destinations can be found [here](#).

DESTINATION EXCITEMENT
% Elevated Excitement (10-8 on 10-point scale)



Question: Thinking carefully about THE NEXT FOUR (4) MONTHS: Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to visit each in the upcoming year.

(Base: Wave 25. Respondents with at least tentative plans to travel in 2020, 480 completed surveys. Data collected Aug 28-30, 2020)



What's going on in your area?

- How are visitors behaving?
- How are businesses feeling?
- What is going well, what needs improvement?



Wrap-Up

- Final Partner Comments
- <https://www.canr.msu.edu/tourism/COVID-19-pandemic-and-tourism/>
- Next Meeting
 - ***September 9th, 10am ET/9am CT.***

