

Tourism Coffee Hour

September 23, 2020
Will Cronin
MSU Extension

We will
start at
3:05!



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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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correo electrónico:

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



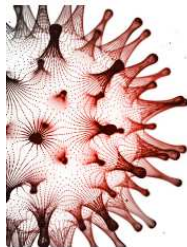
Introductions!



MICHIGAN

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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

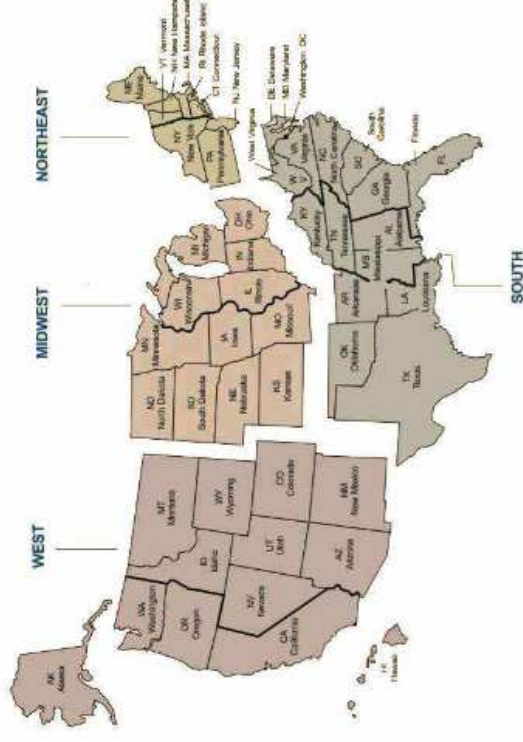
<https://www.destinationanalysts.com/covid-19-insights/>



RESEARCH OVERVIEW & 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 28 data (fielded September 18th-20th) will be presented today**
- **1,200+ fully completed surveys collected each wave**
- **Confidence interval of +/- 2.8%**
- **Data is weighted to reflect the actual population of each region**

U.S.Regions



Americans who Feel a High Degree of Daily Stress

Currently, 47% of American travelers feel a high degree of stress in their daily lives. Be it from managing distance learning for children to navigating extreme weather, Americans are a little likelier to be keeping themselves up at night and feeling tired than they were a few months ago. While stress is up, the propensity to worry about coronavirus, however, is down.

Question: Please tell us about how you have been feeling DURING THE LAST MONTH. Using the scale below, tell us how often you feel each.

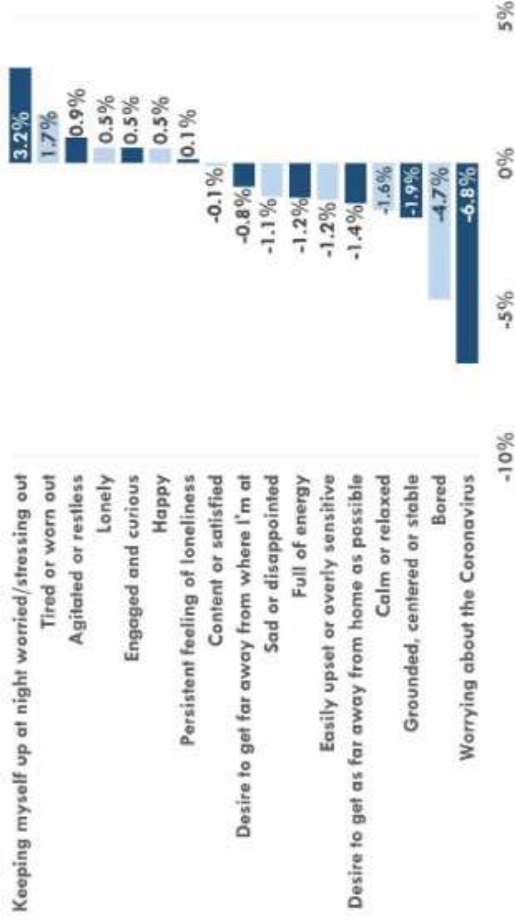
(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)

AMERICANS WHO FEEL A HIGH DEGREE OF DAILY STRESS



RECENT FEELINGS:

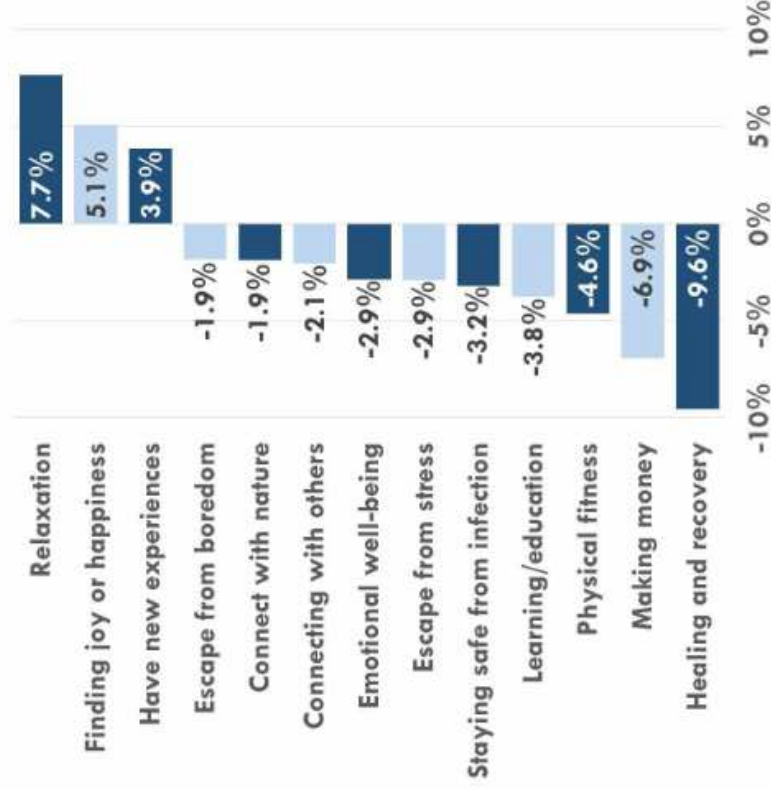
ABSOLUTE CHANGE FROM JULY 2020



Shifts in Lifestyle Priorities

Since April, and amidst rising stress, more Americans are reporting stronger prioritization of relaxation, finding joy/happiness, and—especially important for travel—having new experiences. Whether GenZ, Millennial, GenX or Baby Boomer, the generations are all in agreement on the prioritization of emotional well being, in addition to relaxation and finding joy/happiness. While staying safe from infection is also a top lifestyle priority across the board, it has nevertheless declined, most notably for Boomers, who have instead increased their focus on relaxation. Among Millennial and younger age travelers, escaping from stress and connecting with others are not quite as strongly priorities as was felt in August, instead returning back to May levels. GenX-age travelers are the likeliest to be prioritizing connecting with nature as they look out over the next six months of their lives.

**SHIFTS IN LIFESTYLE PRIORITIES:
ABSOLUTE CHANGE FROM APRIL 2020**



Question: Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.

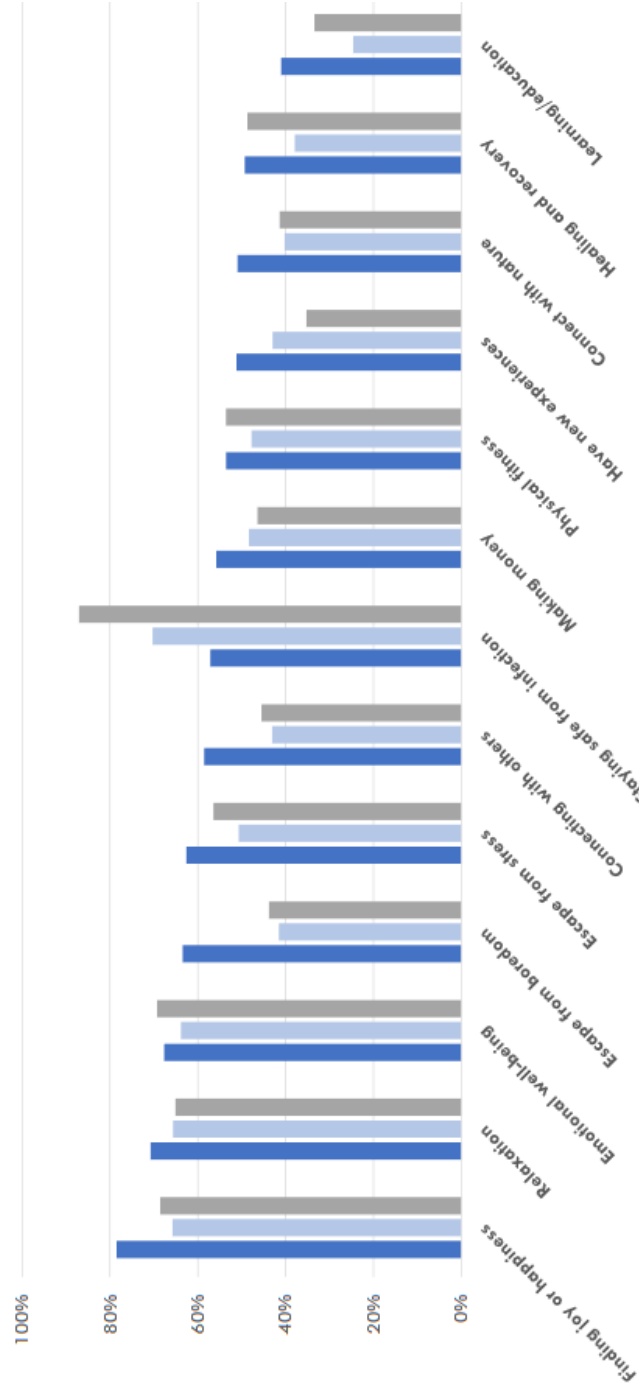
(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)



Lifestyle Priorities by Travel State-of-Mind

Perhaps of most importance, those who are already traveling (or ready to without hesitation) are far likelier to be prioritizing finding joy and escaping from boredom compared to other Americans.

- Already traveling + ready to travel, without hesitations
- Ready to travel, but feel some hesitation
- Need a little more + a lot more time to be ready to travel



Question: Tell us about your lifestyle priorities in the next six months. However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)



Openness to Travel Inspiration

With these patterns in both continued and shifting lifestyle priorities, openness to travel continues to bloom. As has been for the last month, over 54% of Americans identify with being in a “ready to travel” mindset versus needing more time. American travelers’ level of excitement for learning about new travel experiences or destinations to visit is at a pandemic-period high—one last (and only other time) obtained at the end of May, at the start of the summer season.

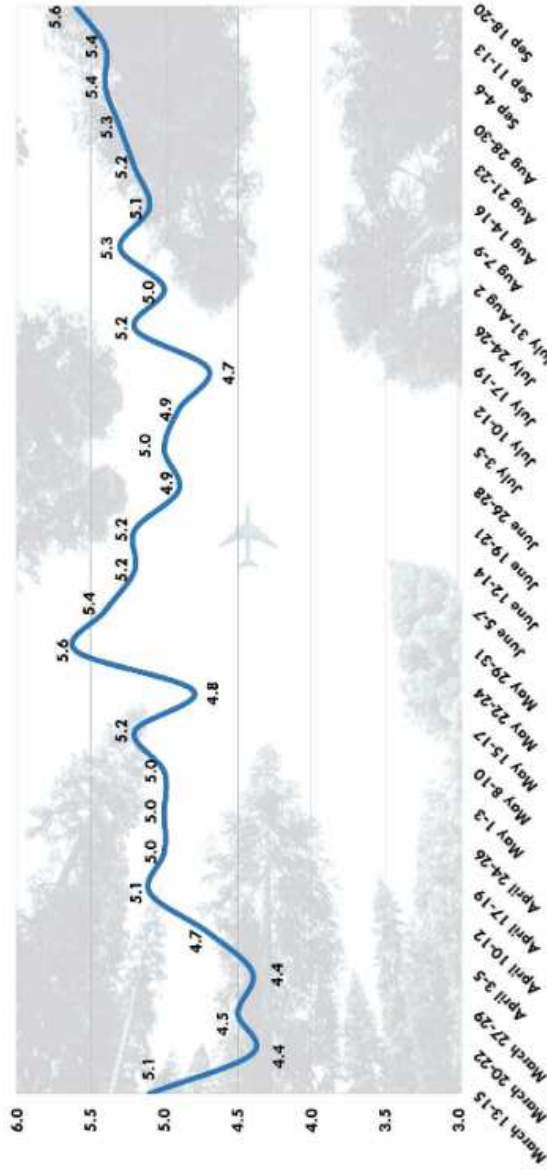
Question: At this moment, how interested are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Waves 1-28. 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 and 1,200 completed surveys.)

OPENNESS TO TRAVEL INSPIRATION MARCH – SEPTEMBER



OPEN TO TRAVEL INSPIRATION (AVERAGE SCORE ON AN 11-POINT SCALE)



Won't Travel Without a Vaccine

Unlike early on in the pandemic, now less than 50% of American travelers consider staying in a hotel, Airbnb or home rental, dining in a restaurant, visiting an amusement park or other outdoor attraction, recreating outdoors and shopping to be unsafe. Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic. Over half of American travelers continue to say they are at least somewhat confident they can travel safely in this environment.

Now just 37% agree they need a vaccine to travel, down from a high of 45% at the start of August.

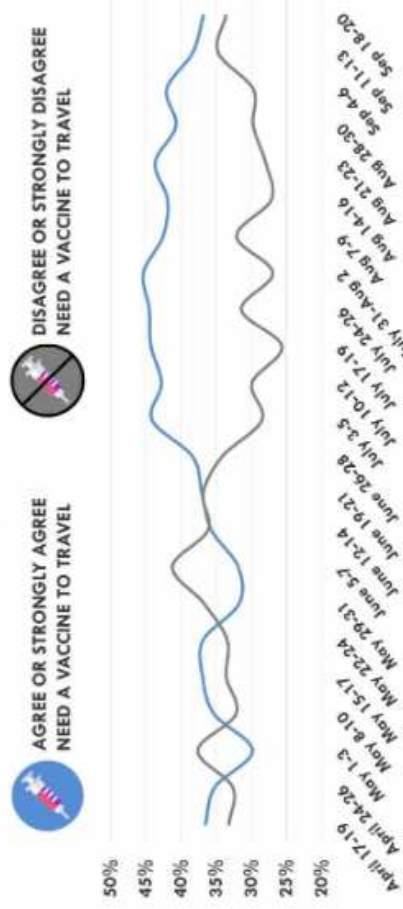
**Question: How much do you agree with the following statement?
Statement: I'm not traveling until there is a vaccine.**

(Base: Waves 6-28. 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 and 1,200 completed surveys.)

WON'T TRAVEL WITHOUT A VACCINE AS OF SEPTEMBER 20TH



HISTORICAL DATA



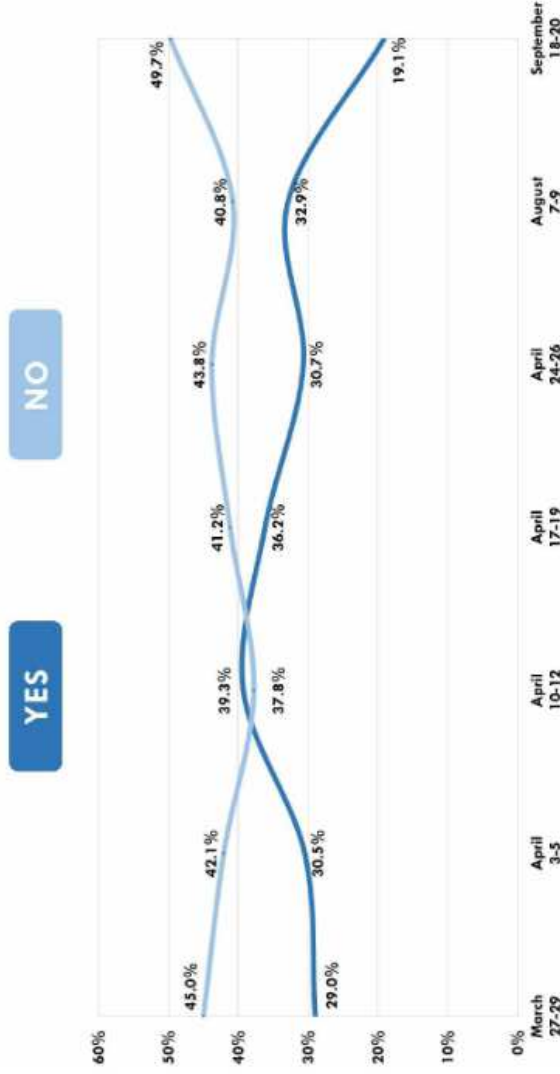
Expectations to Change Types of Destinations to Travel to After the Pandemic

With these growing feelings of safety surrounding travel, less Americans are saying they are going to change the types of travel destinations they choose to visit post-pandemic. In April nearly 40% of American travelers agreed they would change the destinations they traveled to, now less than 20% do—a 50% decrease. In addition, among those that are saying they will change the types of destinations they choose to visit, more positive reasons are being offered up as to why than in prior months, including an increased willingness to explore new destinations and crossing places off their bucket lists.

Question: When the coronavirus situation is resolved, do you expect that you will change the types of travel destinations you choose to visit? (Please think about changes you might make in the SIX (6) MONTH period after the coronavirus situation is resolved)

(Base: Waves 3-7, 22 and 28 data. All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,201 and 1,200 completed surveys.)

EXPECTATIONS TO CHANGE TYPES OF DESTINATIONS TO TRAVEL TO AFTER THE PANDEMIC

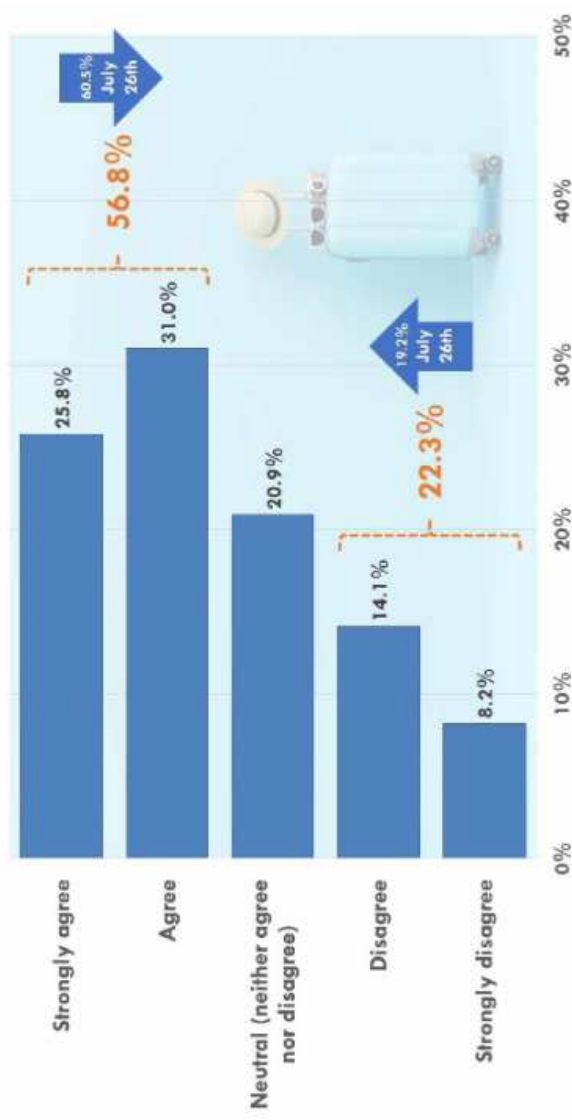


Inability to Fully Enjoy Travel Right Now

Finally, Americans are also less likely to feel their leisure travel will be dampened by the current state of things.

This week, 56.8% agreed that if they were to travel now for leisure, they would not be able to fully enjoy it, down from 60.5% at the end of July. And now just 43.1% have some agreement with the statement “I have lost my interest in/taste for traveling for the time being,” down from 49.5%.

INABILITY TO FULLY ENJOY TRAVEL RIGHT NOW



Question: 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.

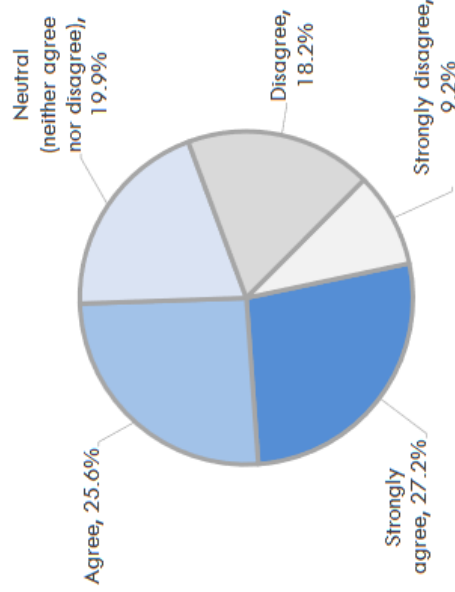
(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)



AVOIDING TRAVEL UNTIL THE CORONAVIRUS BLOWS OVER

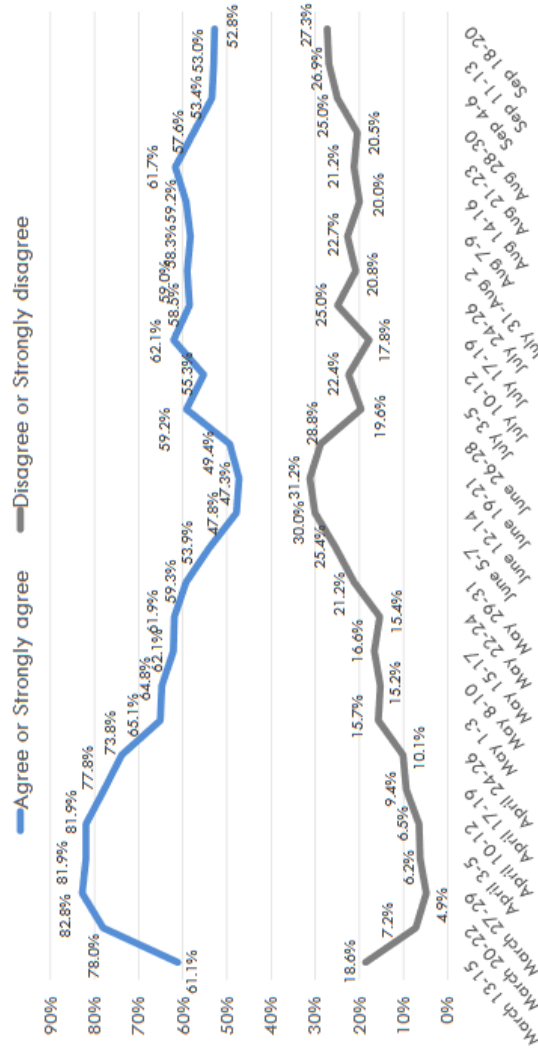
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the Coronavirus situation blows over.

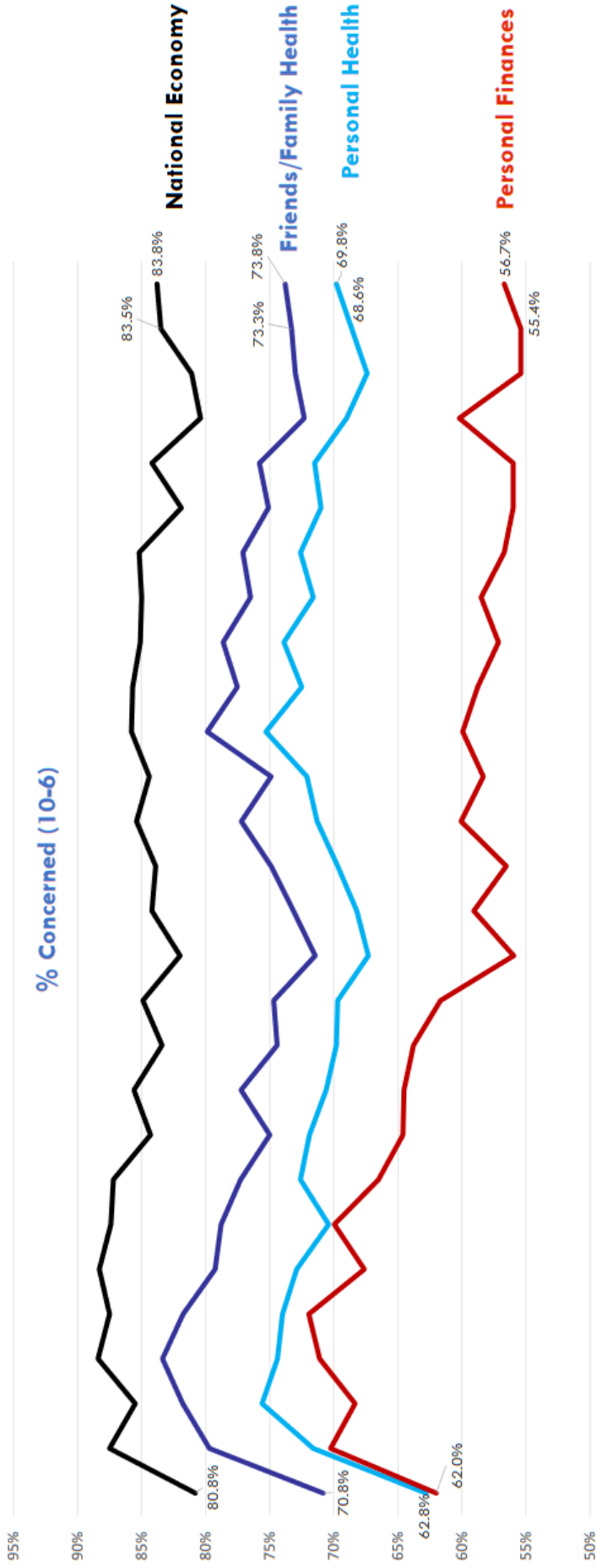


(Base: Waves 1-28. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205 and 1,200 completed surveys.)

Historical data



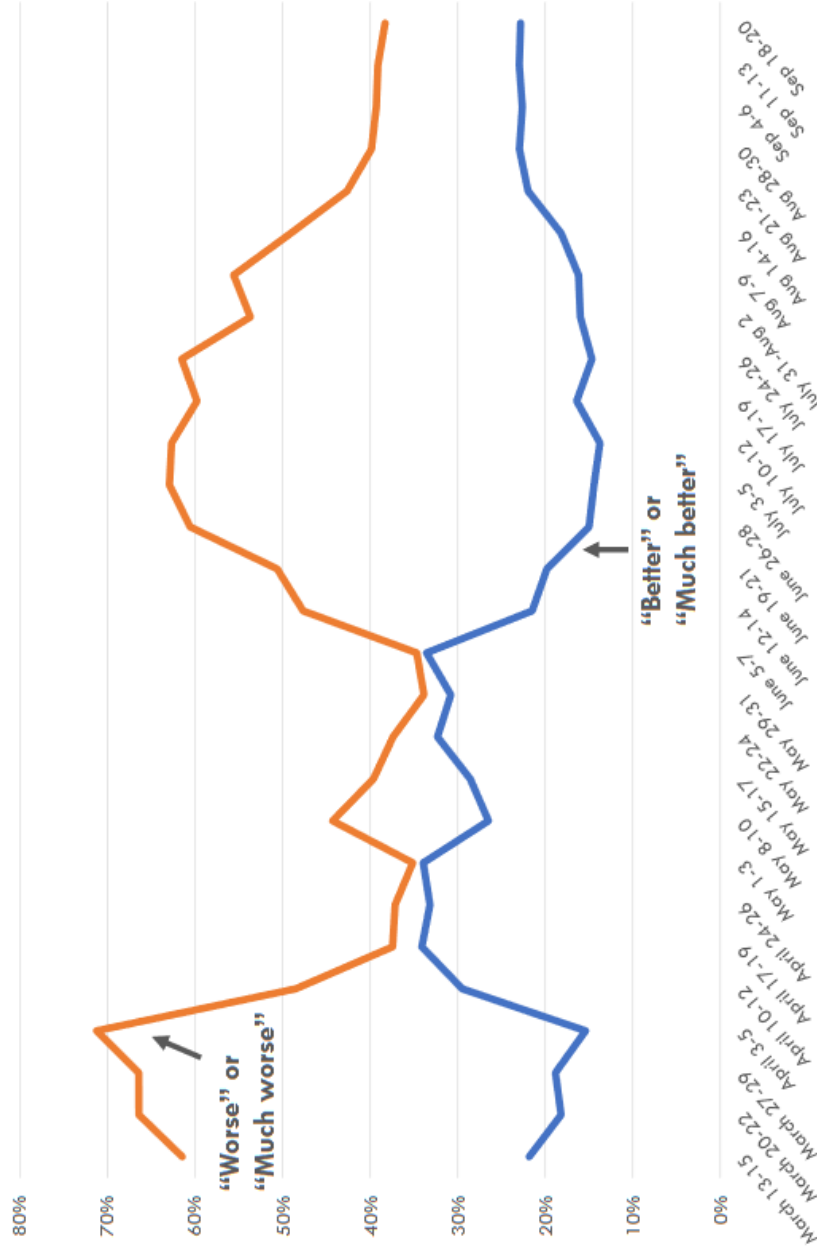
NATIONAL ANXIETY MAP



EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-28)

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 _____



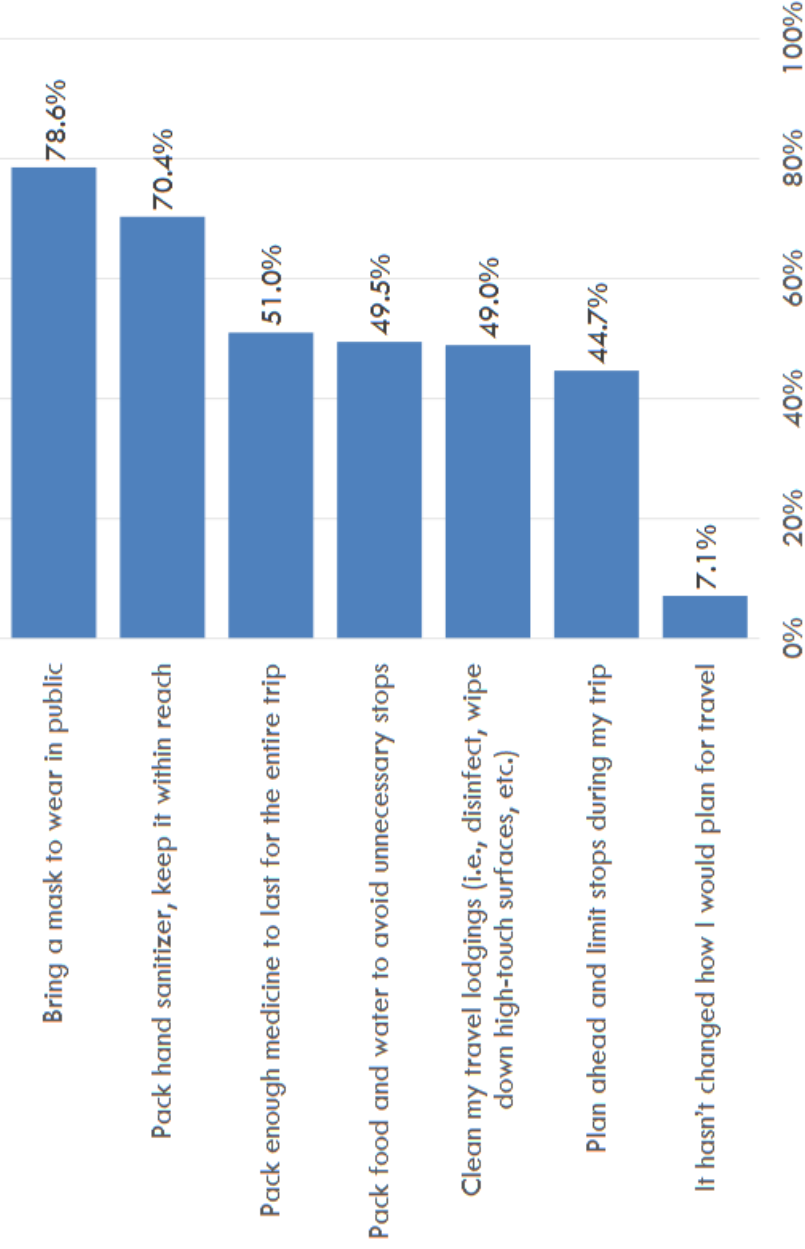
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PANDEMIC'S IMPACT ON TRAVEL PLANNING

Question: How (if at all) has the coronavirus situation affected the way you would plan before traveling? (Select all that apply)

Due to the coronavirus situation, if I were traveling, I would plan to



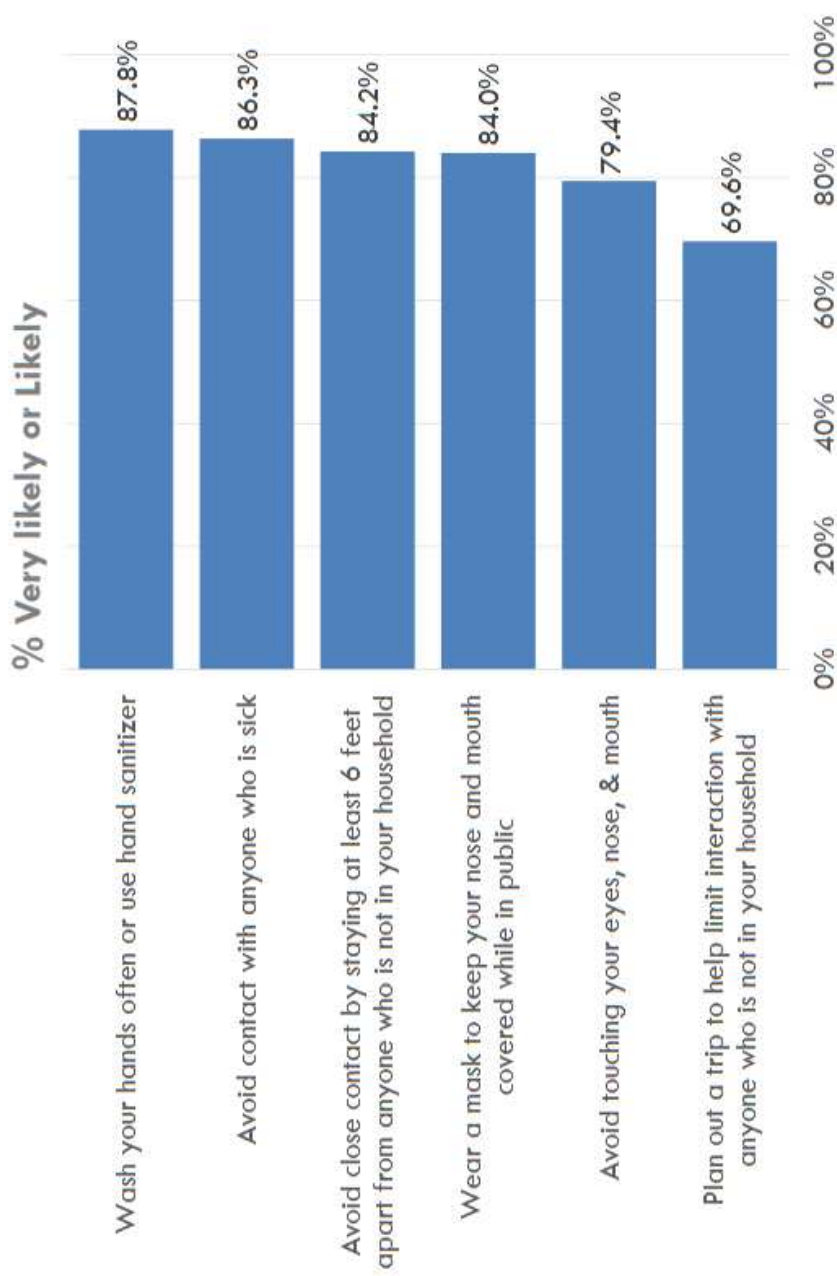
(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)



LIKELY TRAVEL BEHAVIORS

Question: At this moment, how likely would you be to do each of the following if traveling?

(Base: Wave 28 data. All respondents, 1,200 completed surveys. Data collected September 18-20, 2020)



KEY TAKEAWAYS

- There's a stability and holding pattern in many ways Americans view the pandemic and travel right now
- Unlike the early months of coronavirus, less than half of American travelers now consider major tenets of a trip to be unsafe. Overall perceptions of travel's safety remain at the lowest levels they have been during the pandemic
- Openness to travel continues to bloom. The level of excitement for learning about new travel experiences or destinations to visit is once again at a pandemic-period high
- Far fewer Americans are saying they are going to change the types of travel destinations they choose to visit post-pandemic



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 30th, 11am ET/10am CT.***

