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Top line findings – critical that you hear from potential customers. Leading a discussion of travelers.

This conference call was a lot of numbers and charts and graphs. Those will be provided tomorrow. Here are some of the key notes I wrote down, as particular interest to our community. *My personal notes (thoughts) are in blue.*

Of the **travelers** surveyed this past week (numbers rounded)

- 72% are still concerned about catching the virus
- 79% concerned about their loved ones and giving it to their loved ones
- 67% are concerned for their personal finances
- 88% are concerned for the national economy
- 65% reported that they are strongly supporting their LOCAL businesses
- **37% expect the situation to get WORSE**

#### Regarding Safety

- 28% feel comfortable with the thought of engaging in local activities
- Large events and gatherings are what those surveyed feel are the LEAST safe activities

#### Impact on Travel

- 75% of travelers reported that they either had trips they cancelled or postponed. Due to the outbreak. Of course some of these were out of their control.
- 70% have CX Trips this is up from 55% in March.
- Reported that “personal safety” is of top concern for out of country travel was highly reported.
- 7 out of 10 who cancelled trips reported they have NOT rescheduled them as of yet.
- Vacations were reported as the highest type of travel that was cancelled and it was reported that these trips were the least likely to be rescheduled. IE CX instead of Postpone

**There was a sheet with the hot spots listed and California was #2, only behind New York.** *This tells me that we will need to focus on regional markets for the foreseeable future once (if) this situation is resolved.*

#### Conditions under which people plan to travel again:

- 44% will not travel until the situation is completely OVER
- 36.5% said they strongly agreed that they would not travel until a vaccine is available. But on this same question 33% disagreed with that statement.
- 70.% reported that they “Can’t wait to travel again.”

#### Most Anticipated Activities once CV-19 over:

- Friends and Family Get Togethers
- Personal Grooming was #3 on the list
- 1 in 5 stated a trip would be among their first activities

## Where will people go when travel is available?

- Beaches and Rural destinations topped the list
- Hiking, Restaurants and visiting Friends were also high on the list
- 35% indicated excitement about weekend getaways.
- Four out of 10 indicated excitement about traveling to new places
- 1/3 stated that their destination types would be different than originally planned.
- Most respondents indicated their plans initially would be confined to a 50-mile radius of their home (19.8% regional travel and 16.7% in their own community)
- With 40% indicating they will avoid air travel.

## When do people think this will be over?

- **44% don't believe it will be over by summer**
- ½ of those surveyed expect to travel in the fall *This is a quandary for Julian. Because people say they expect to travel in the Fall - BUT also say the least desirable destination is one that has large crowds.*

## Travel Incentives

- 1/3 indicated that discounts would make destinations more interesting
- Segmenting indicated that Boomers were motivated by discounts
- Airport screening was surveyed and 61% said they would be more confident to travel if screening were in place. 77% approved screening for domestic flights.
- The panel of travelers shared some of their incentives and how to reach them
  - Panelist 1 - Millennial – don't watch much cable TV so not commercials – but online ads and blog posts – also relies heavily on her network of friends who travel
  - Panelist 2 – Gen X – Online ads
  - Panelist 3 – Boomer - periodicals and ads on Travel Channel and Weather Channel
- All panelists stated that SAFE destination was the key to their travel choices. Their main concerns were for their circles – not necessarily themselves but spreading to those they care about.
- Panelists also indicated they would look at 2-hour radius first and day trips
- One panelist brought out that if there were two equally safe destinations and one of them offered discounts, that could sway his decision on location. But he also said he would pay more to travel somewhere he felt safer and that money could not change that thought process.

## PERCEPTION Noted *(This will be of particular concern to our lodging members)*

- All three panelists seemed to agree that lodging at large chains would most likely be safer because of the increased exposure if they had poor practices. So, larger chains are more likely to implement a strict cleaning protocol. **One panelist (millennial) indicated that though she loves to support small business, she saw Airbnb and mom/pop lodging as riskier.** *This indicates to me that we really need to communicate with our lodging facilities that it is paramount that they inform and keep informing potential visitors of their protocols around being safe places to visit.*

## Travel Expectations

- Extra handwashing stations and/or availability of hand sanitizer
- Adequate trash receptacles to handle the discarding of wipes and trash so that people feel they are in a clean place.