



SOUTH WALTON FLORIDA

Consumer Sentiment Study May 1st, 2020

Presented by Downs & St. Germain Research



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Introduction



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Study Purpose & Research Methods

Study Purpose

Determine the impact of COVID-19 on consumers' feelings about travel and travel-related advertising. This is the 1st wave of multiple waves of the survey to see how consumer sentiment changes over time.

Research Methods

Data was collected through online surveys with consumers in Atlanta, Nashville, Houston, Dallas, Birmingham, and New Orleans/Baton Rouge between April 27th and April 28th, 2020. Consumers were adults between 21 – 70 years old who earned at least \$100,000 per year in household income, served as a key decision-maker in where their household takes vacations, and had stayed in paid accommodations during a trip or vacation in 2019.





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Key Takeaways



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Key Takeaways: Safety

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Consumers trust the **CDC** to tell them when it is safe to travel again **more than any other source**



Consumers **do not feel safe** traveling right now



Consumers believe that it will be safe to travel again once **large attractions, restaurants, and retail businesses** re-open



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Key Takeaways: Future Travel



A **majority of travelers** plan on taking a vacation or getaway **within a month** of COVID-19 passing



When travelers return, **drivable locations and other uncrowded areas** will be the most likely destinations



2 in 5 travelers are likely to visit **South Walton** once it is deemed safe to travel again



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Key Takeaways: Marketing



Consumers will be ready to see ‘normal’ destination advertising about **three weeks** prior to when they feel safe to travel



At this point, consumers want to hear about **what destinations are doing to help** during the crisis.



Once it is deemed safe to travel, consumers want to hear about **how destinations are prioritizing safety.**



Travel articles and videos on social media are the most popular travel media right now



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Detailed Findings



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Trust in Travel Advice

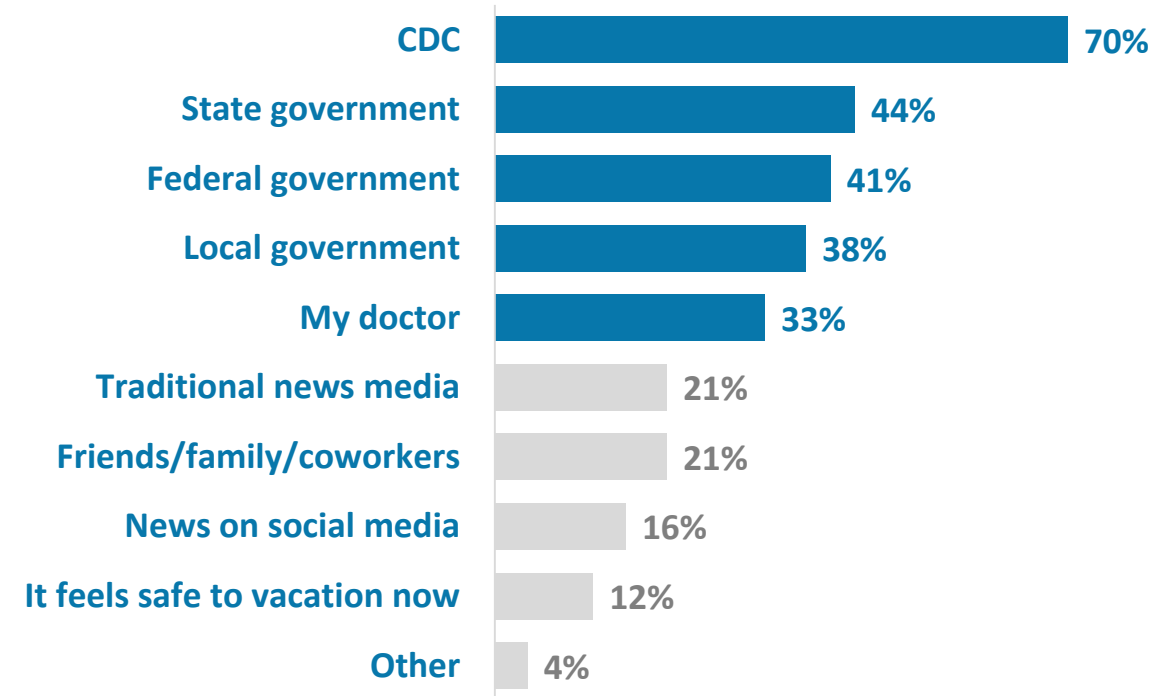
Consumers trust the Centers for Disease Control and Prevention **significantly more** than they trust other sources to tell them when it is safe to travel again

1 in 8 consumers believes that it is safe to vacation right now



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WHICH OF THE FOLLOWING DO YOU TRUST TO TELL YOU IT'S
SAFE TO VACATION AGAIN?*



*Multiple responses permitted.

Opinions on Travel Safety Indicators

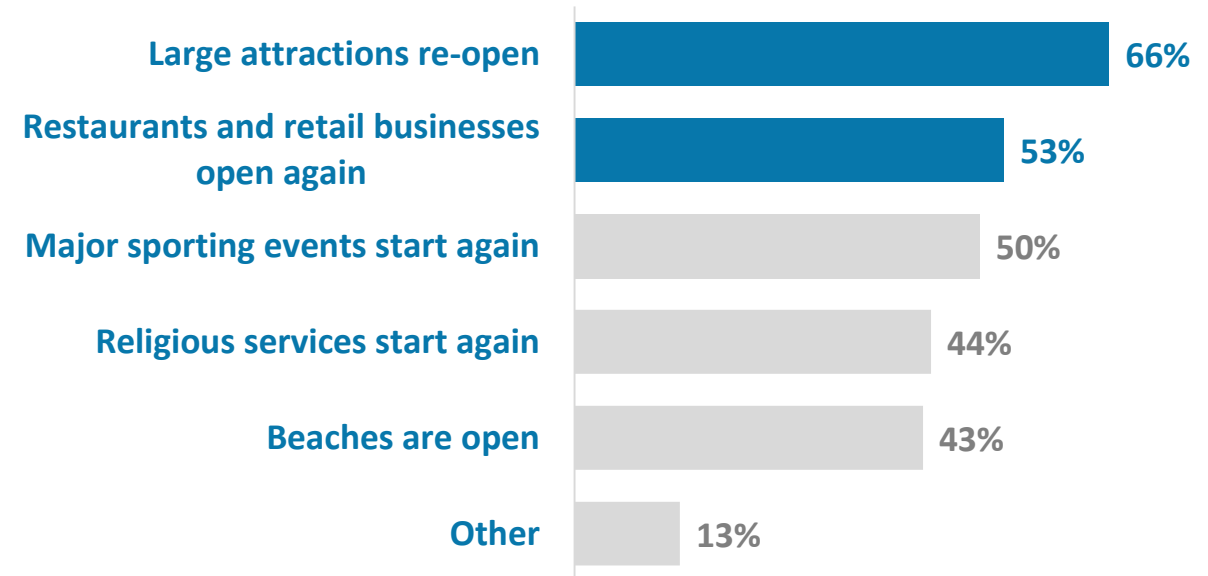
About 2 in 3 consumers believe that it will be safe to travel again when large attractions re-open, but they also look to re-opening of restaurants and retail businesses as an indicator of travel safety



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IN YOUR OPINION, IT WILL BE SAFE TO TRAVEL AGAIN WHEN...*



*Multiple responses permitted.

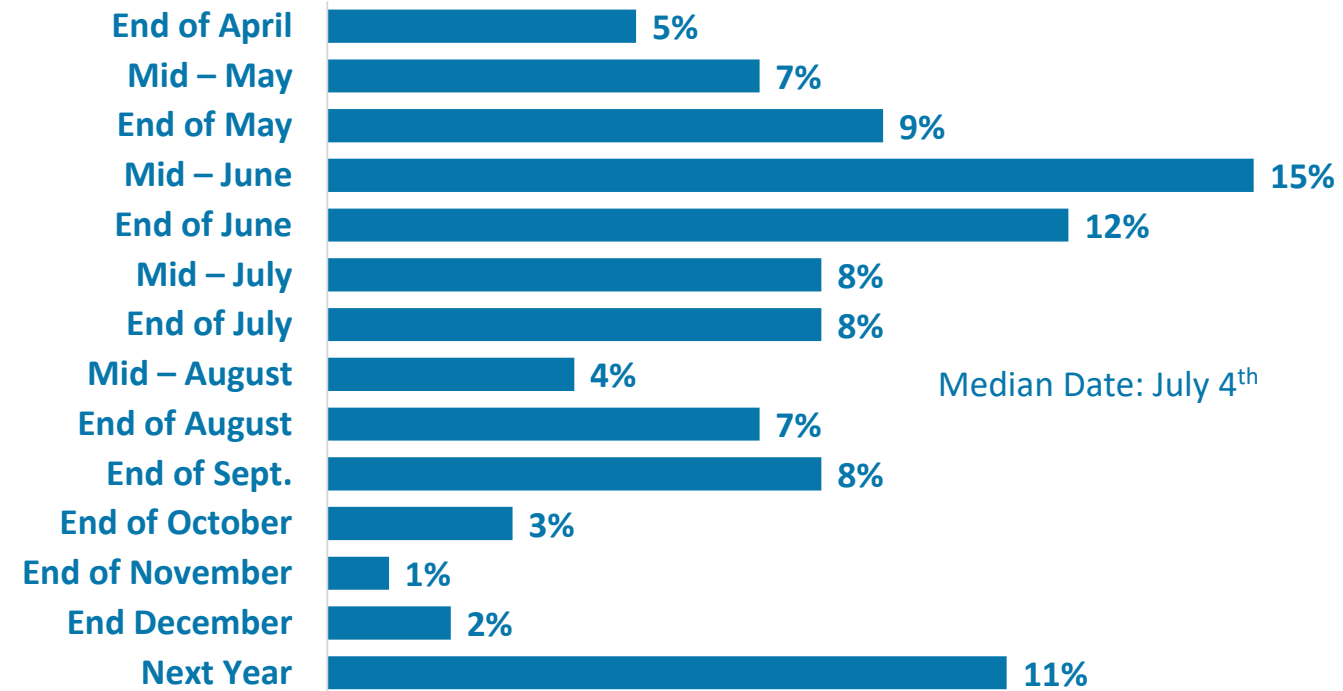
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Travel Safety Timeline

2 in 10 consumers feel it is safe to travel in May

Another **1 in 2 consumers** think it will be safe to travel this summer

WHEN DO YOU THINK IT WILL BE SAFE TO TAKE LONG WEEKEND GETAWAYS OR VACATIONS?



Planned Vacations & Long Getaways

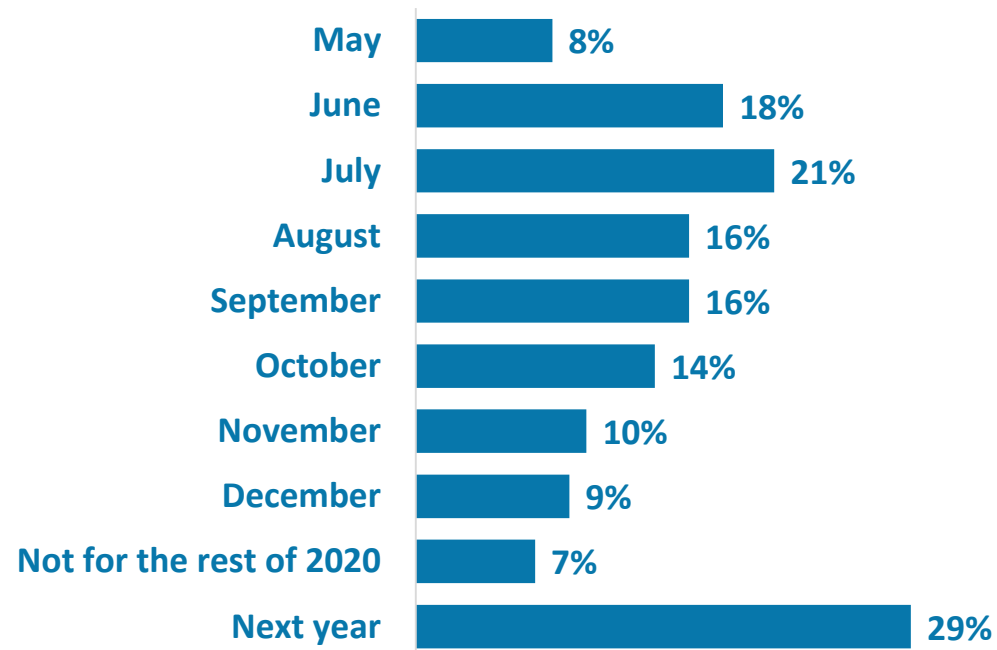
There are 3 relatively equal segments of consumers:

- 1 planning to travel this summer
- 1 planning to travel later in the year
- 1 planning not to travel this year

Consumers who have planned at least one vacation before the end of 2020 are mostly likely to travel over the **summer**

3 in 10 consumers are planning a vacation or long getaway next year

HAVE YOU BEGUN PLANNING A VACATION OR LONG GETAWAY FOR THE FOLLOWING MONTHS?*



*Multiple responses permitted.

Perception of Safety in Travel Activities

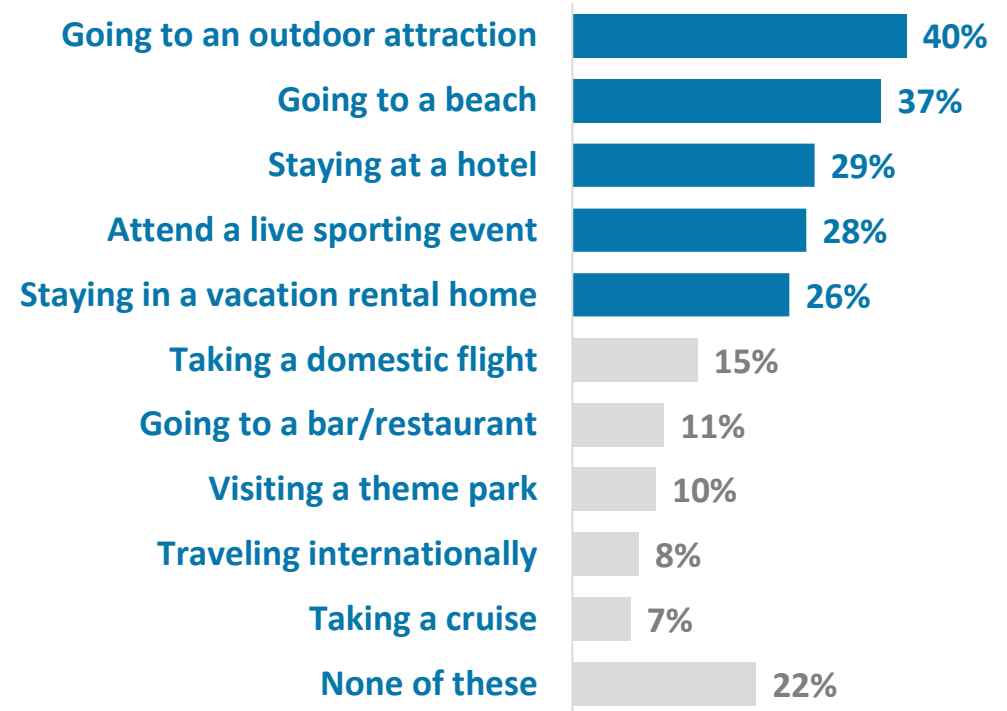
Consumers are **most comfortable** going to an outdoor attraction and the beach compared to other travel activities

1 in 5 consumers does not feel safe participating in any travel-based activities right now, especially taking a cruise or traveling internationally



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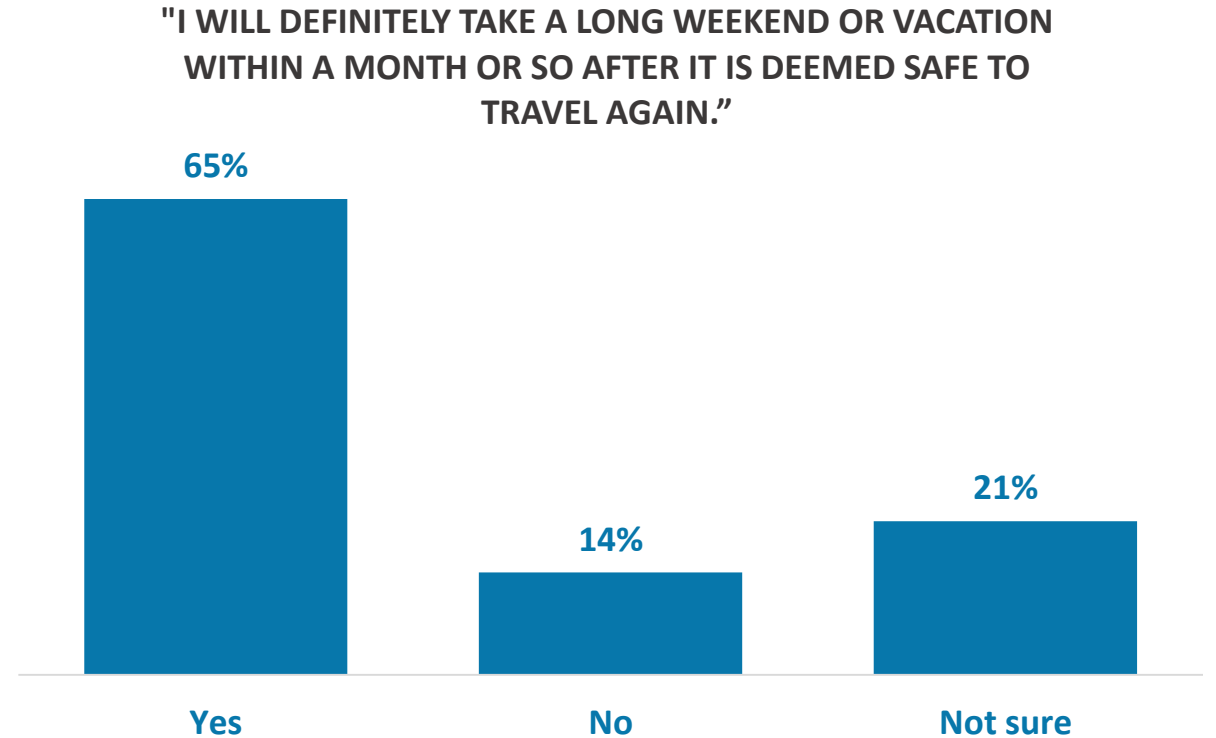
RIGHT NOW, DO YOU FEEL SAFE DOING ANY OF THE FOLLOWING?*



*Multiple responses permitted.

Likelihood of Imminent Travel after COVID-19

2 in 3 consumers will “definitely” take a long weekend or vacation within a month or so after COVID-19 seems to be over



Travel Preferences after COVID-19

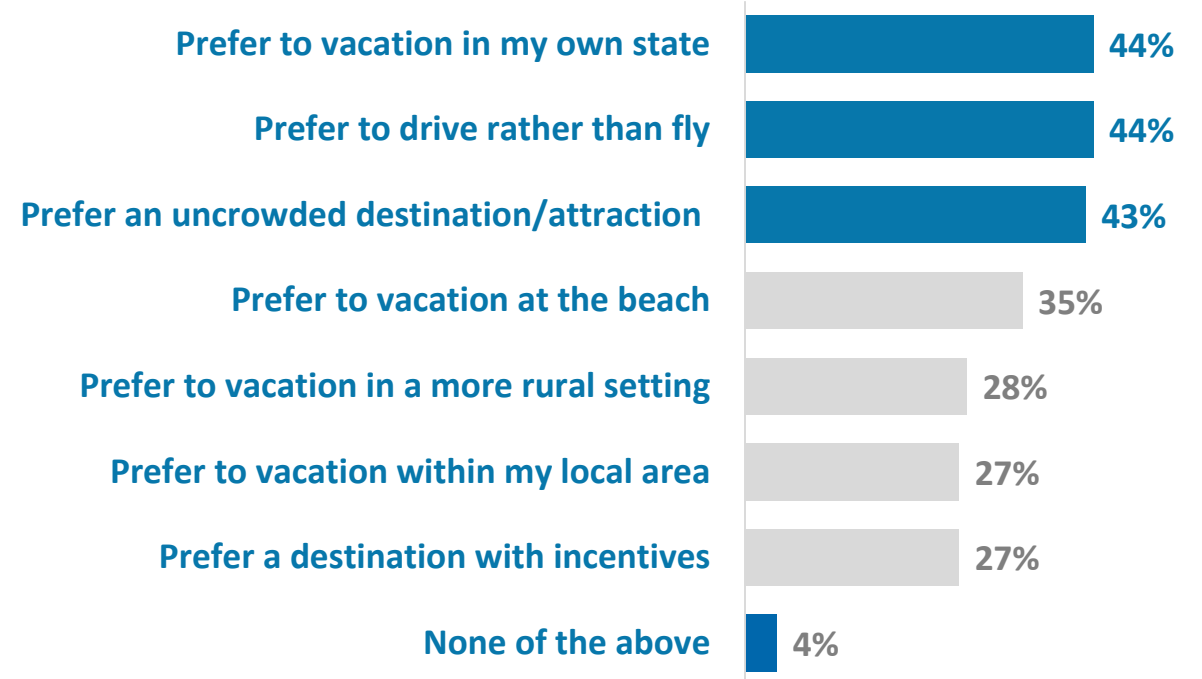
Once it is safe to travel again, consumers are most likely to visit **destinations in their own state to which** they are able to **drive** and are **uncrowded**



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ONCE IT IS DEEMED SAFE TO TRAVEL AGAIN, WHICH OF THE FOLLOWING WOULD YOU PREFER?*



*Multiple responses permitted.

Travel Destinations to Consider after COVID-19

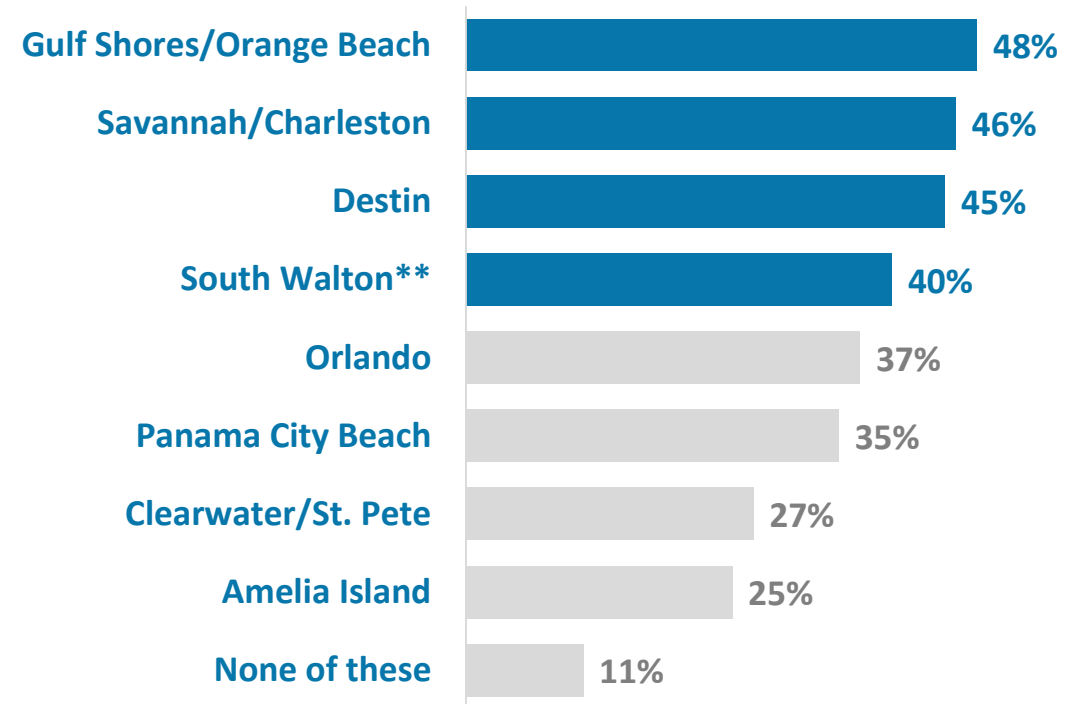
2 in 5 consumers would consider visiting a South Walton beach community once COVID-19 passes and it is deemed safe to travel again



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WHICH DESTINATIONS WOULD YOU CONSIDER VISITING AFTER COVID-19 PASSES?*



*Multiple responses permitted.

**South Walton was defined by listing beach communities.

Destination Advertising during COVID-19

Over **half** of consumers want to hear from vacation destinations and attractions during the COVID-19 crisis about what they are doing to help

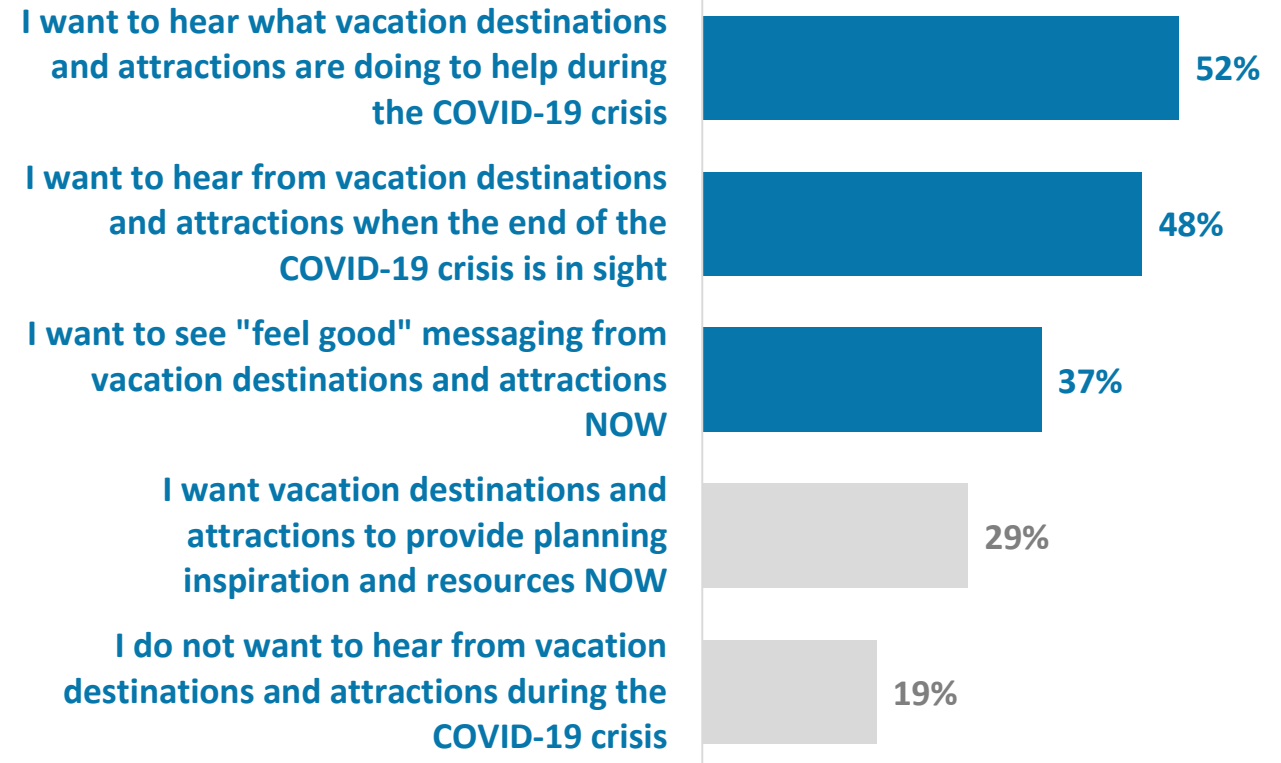
1 in 5 consumers does not want to hear from vacation destinations and attractions during the COVID-19 crisis



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REGARDING ADVERTISING FROM VACATION DESTINATIONS AND ATTRACTIONS, WITH WHICH OF THE FOLLOWING DO YOU AGREE?*



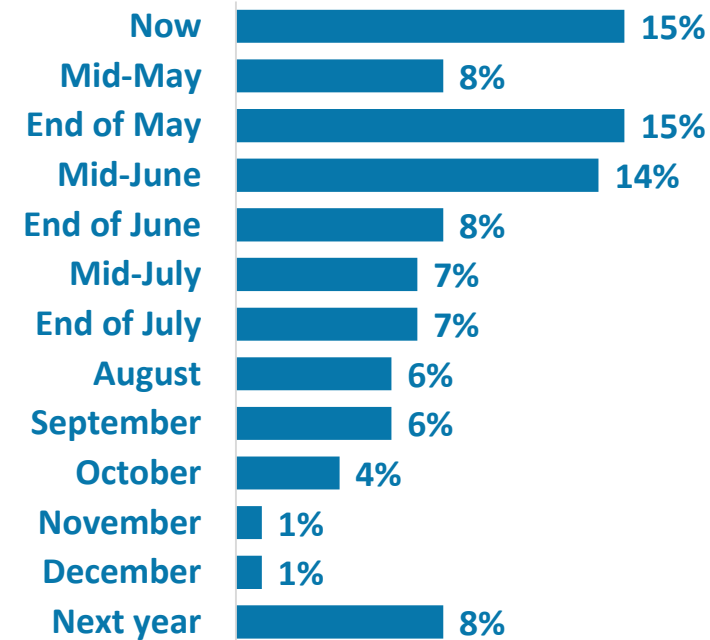
*Multiple responses permitted.

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Continuation of Travel Advertising

Consumers believe it will be appropriate for destinations and attractions to resume typical advertising efforts **towards the middle of June**

WHEN DO YOU THINK IT WILL BE APPROPRIATE FOR
DESTINATIONS AND ATTRACTIONS TO RESUME THEIR
NORMAL ADVERTISING EFFORTS?



Median Date: June 13th

Future Travel Planning Resources

Half of consumers will search on Google and/or destination websites to help them plan their trips when they are ready to travel again

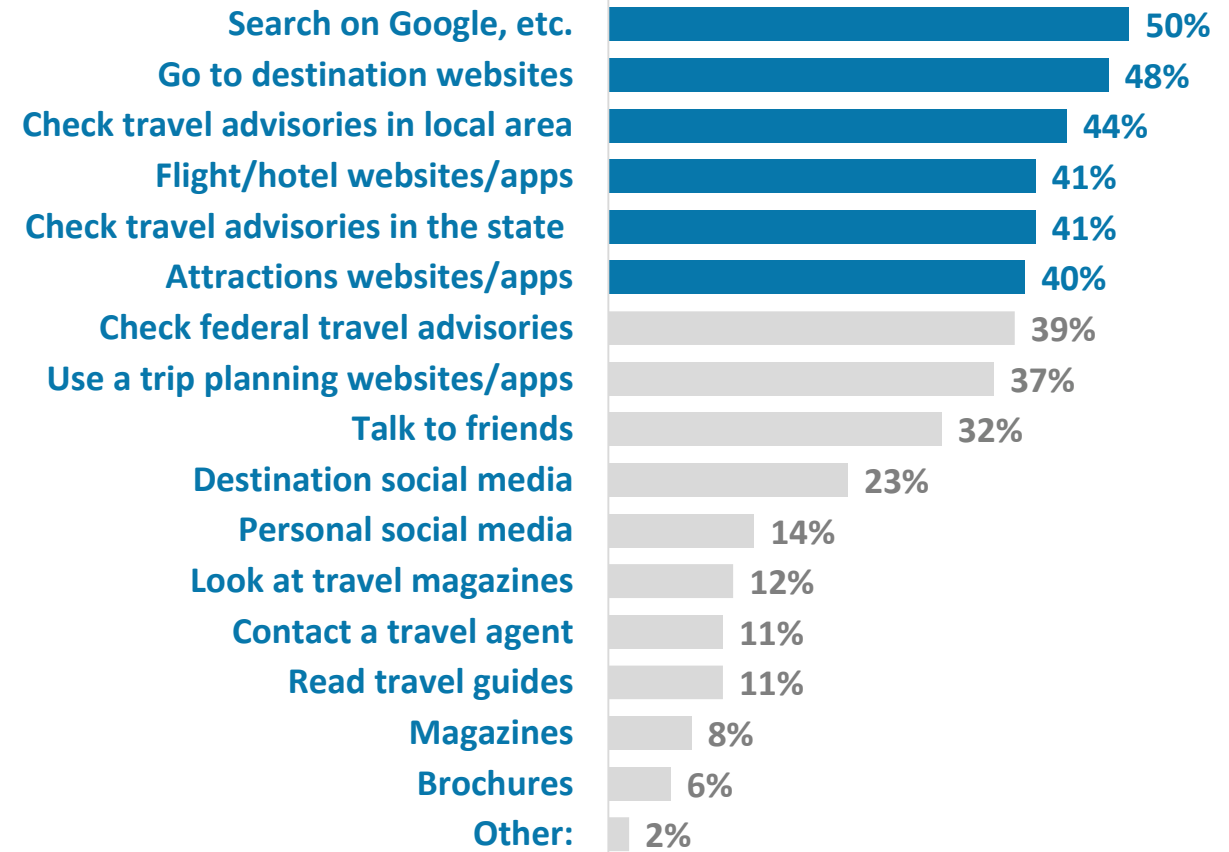
2 in 5 consumers will rely on travel advisories in the local area where they are considering travel to help them plan their trips when they are ready to travel again



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WHEN YOU ARE READY TO TRAVEL AGAIN, WHICH OF THE FOLLOWING WILL YOU USE TO PLAN YOUR TRIP?*



*Multiple responses permitted.

Travel Information in Destination

1 in 3 consumers will do their travel planning mainly on their computer, but some on their mobile phone.

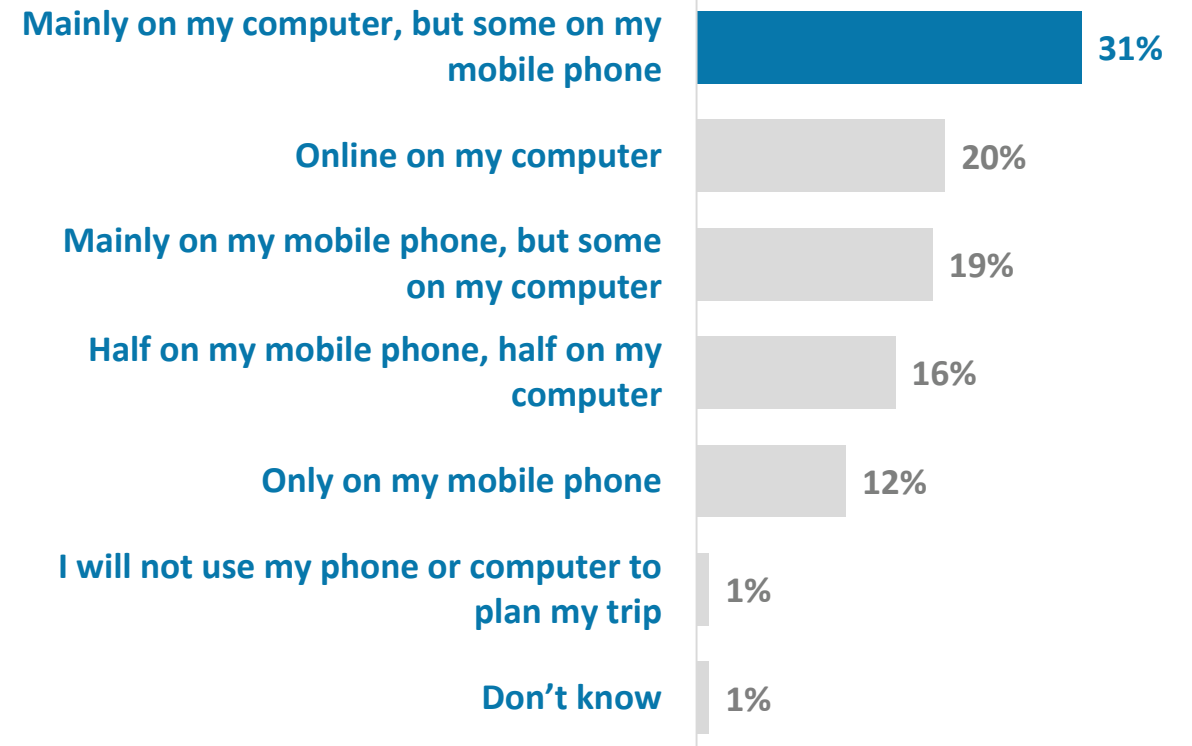
Visitors are **unlikely** to plan their travel without a phone or a computer



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WHEN YOU ARE READY TO TRAVEL AGAIN, WOULD YOUR PLANNING BE DONE:

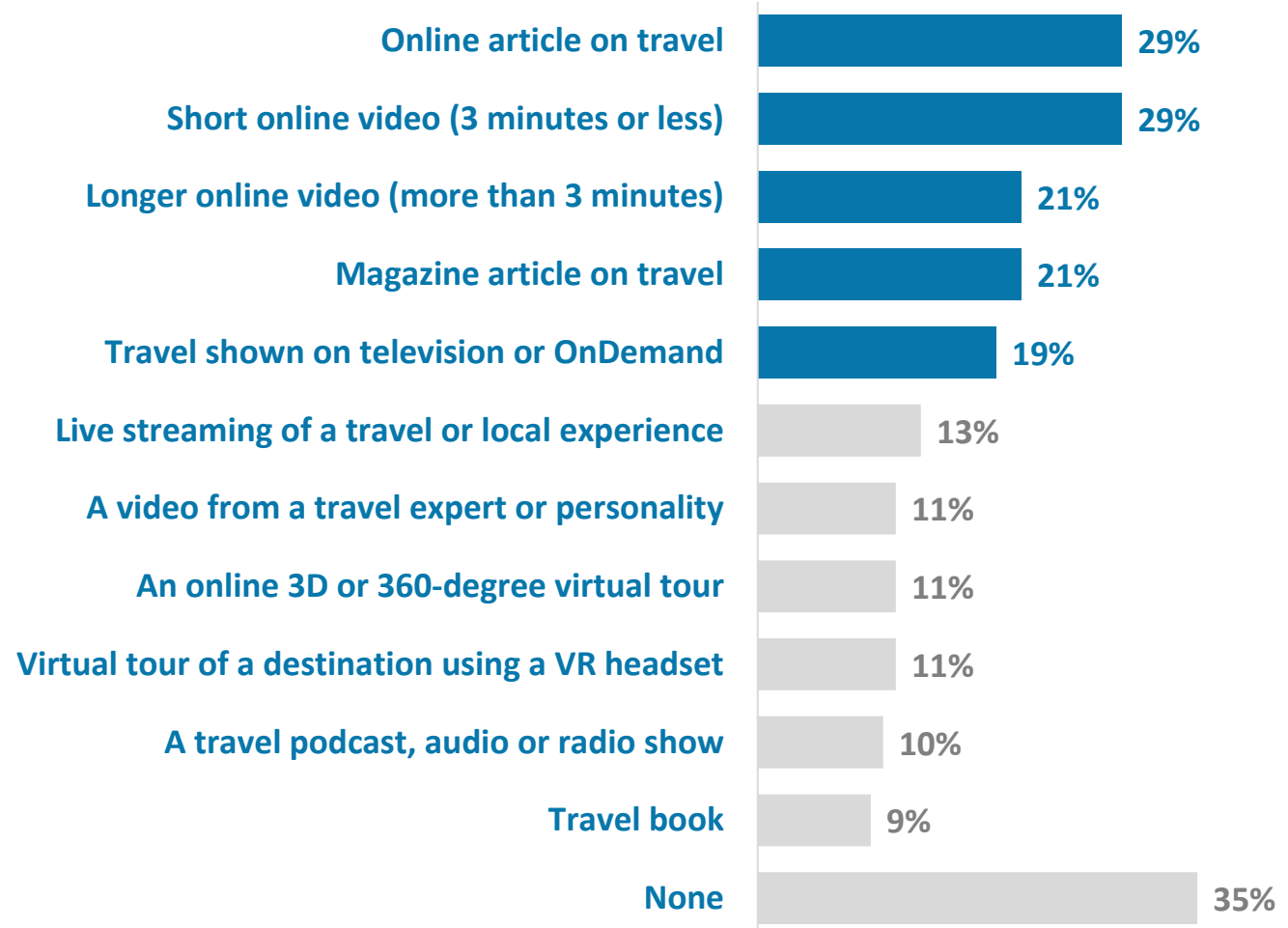


Recent Interactions with Travel Media

1 in 3 consumers has not viewed or interacted with any travel media in the past two weeks

Consumers who have viewed or interacted with travel media in the past two weeks have primarily been exposed to it through **online articles on travel and short online videos**

WHICH OF THE FOLLOWING HAVE YOU READ OR INTERACTED WITH IN THE PAST 2 WEEKS?*

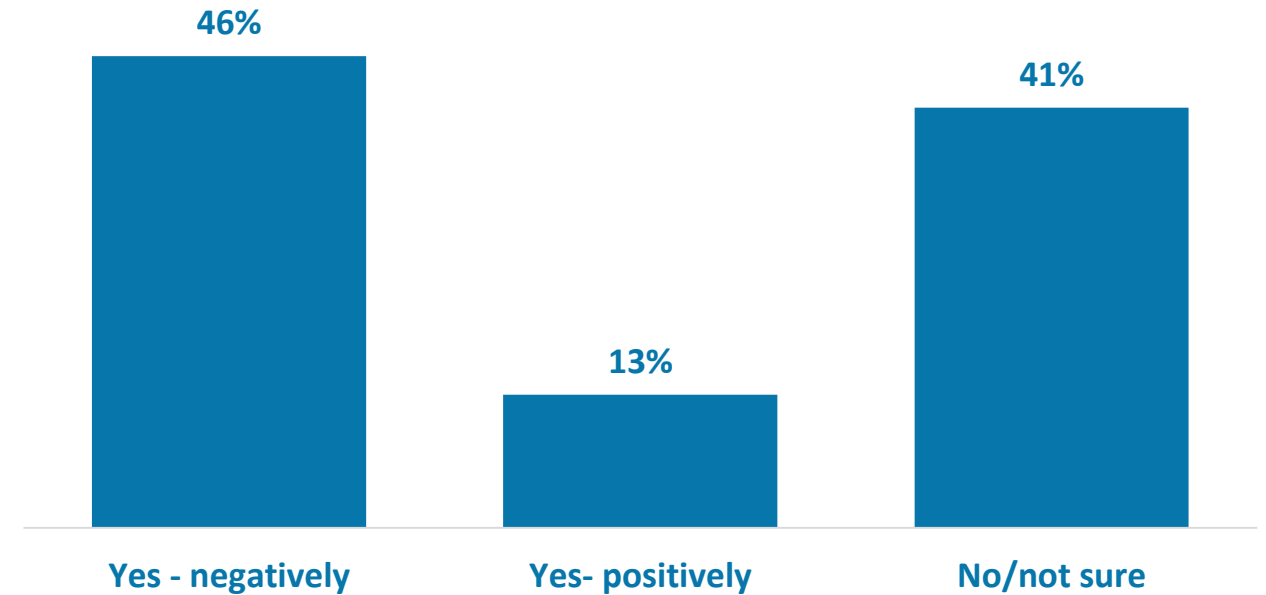


*Multiple responses permitted.

Personal Effects of COVID-19

Almost **half** of consumers have been affected financially by the economic downturn due to COVID-19

HAVE YOU OR YOUR IMMEDIATE FAMILY BEEN AFFECTED
FINANCIALLY BY THE ECONOMIC DOWNTURN DUE TO COVID-19?



Future Travel Plans

Half of consumers who have been impacted financially by COVID-19 will take fewer vacations/getaways

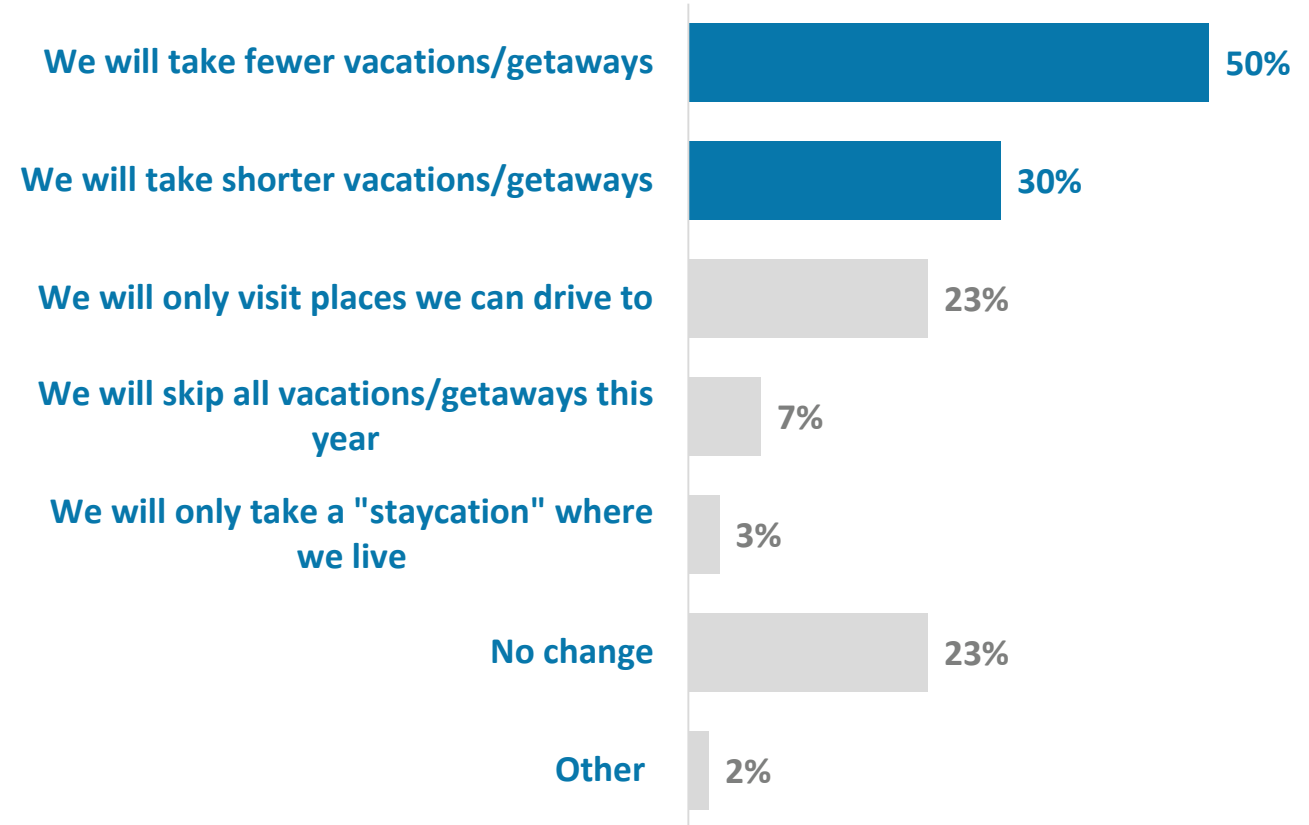
2 in 10 consumers will not change their travel plans due to the financial effects of COVID-19



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HOW WILL THE ECONOMIC DOWNTURN AFFECT YOUR TRAVEL PLANS, NOW OR IN THE FUTURE? SELECT ALL THAT APPLY.



*Multiple responses permitted.

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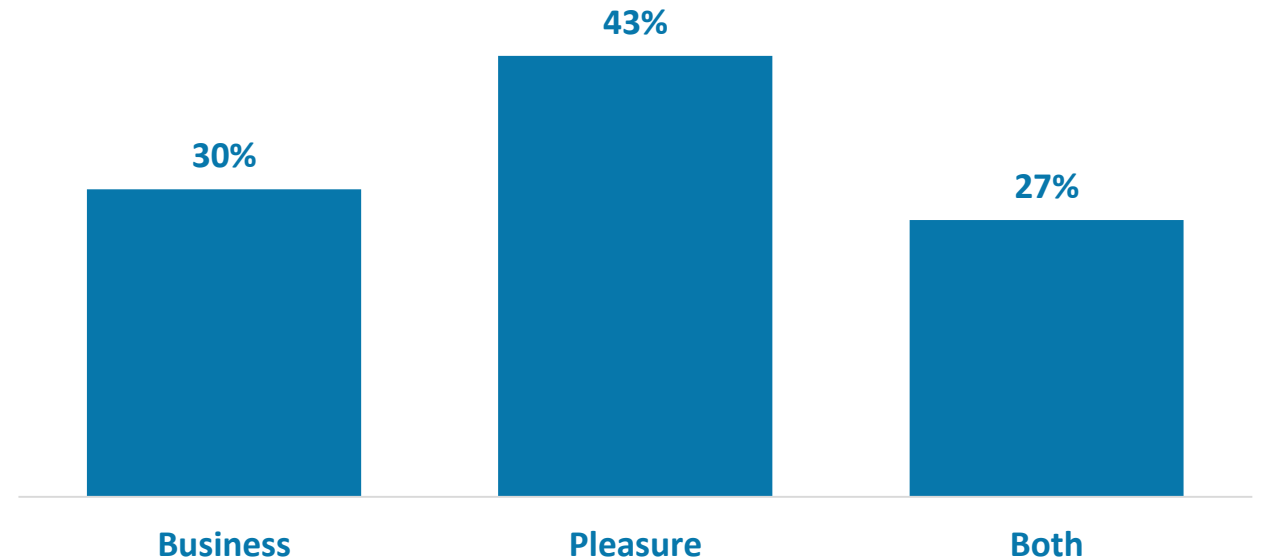
Travelling Overnight

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11% of consumers have traveled overnight in the past three weeks

7 in 10 of these trips were at least partially for pleasure

WAS YOUR TRIP(S) FOR BUSINESS OR PLEASURE?



Continuation of Travelling Overnight

Almost **half** of consumers who traveled overnight in the past three weeks stayed in a hotel, motel, resort, etc.

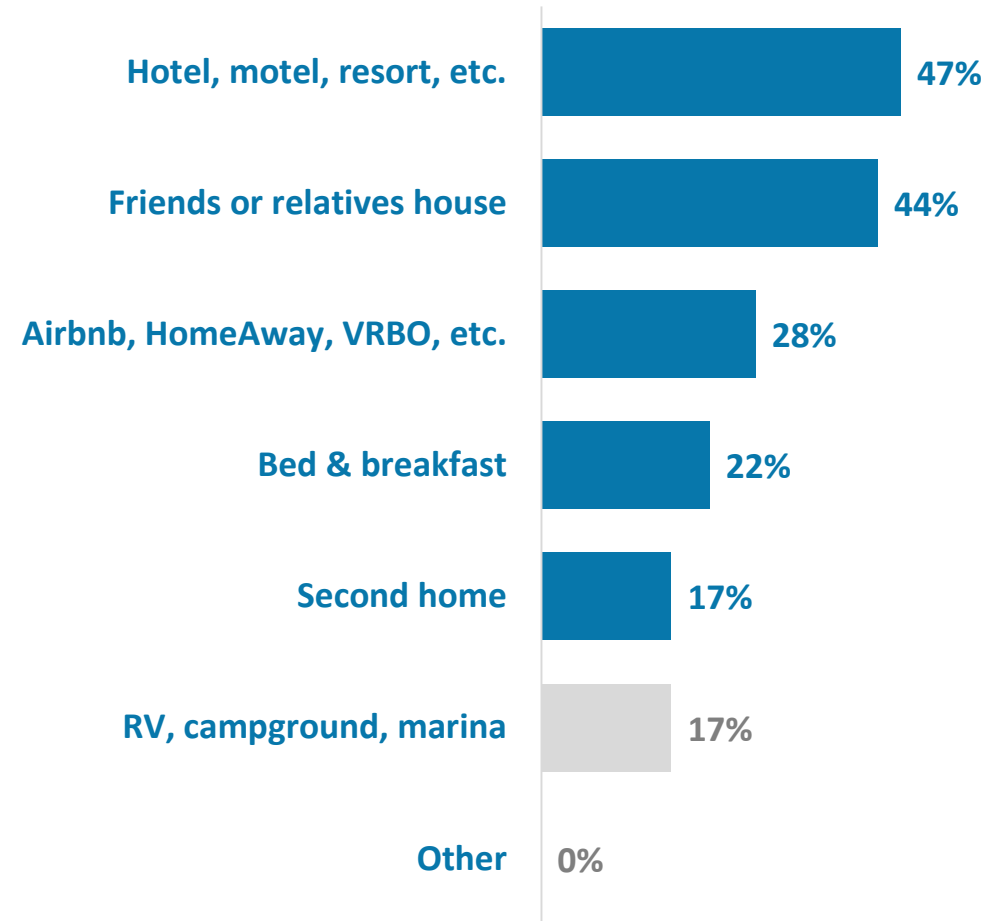
2 in 5 consumers who traveled overnight in the past three weeks stayed with **friends or relatives**



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DID YOU STAY OVERNIGHT IN: SELECT ALL THAT APPLY



*Multiple responses permitted.

Current Associations with Travel

Consumers currently associate travel with a **lack of safety** and feelings of **uncertainty, fear, and caution**



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WHAT ONE WORD OR PHRASE DESCRIBES HOW YOU FEEL ABOUT TRAVEL RIGHT NOW?



Desired Messaging from Destinations/Attractions

Once it is deemed safe to travel again, consumers believe that advertisements from vacation destinations that underscore how they are **prioritizing safety** will be most effective at enticing them to visit

WHAT ADVERTISING MESSAGE OR THEME FROM DESTINATIONS/ATTRACTIONS WOULD MOTIVATE YOU TO VISIT ONCE IT IS DEEMED SAFE TO TRAVEL AGAIN?*



*Coded from open-ended verbatim responses.
Multiple responses permitted.



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Consumer Profile



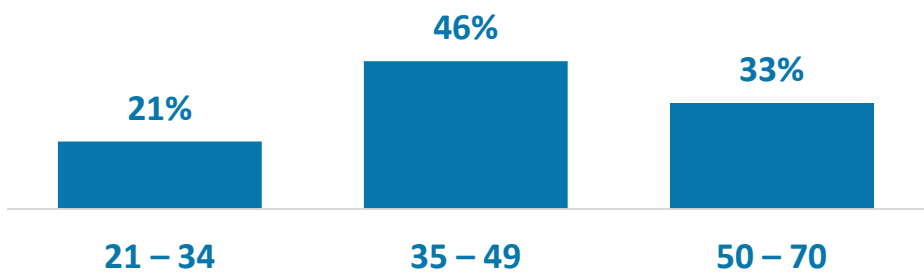
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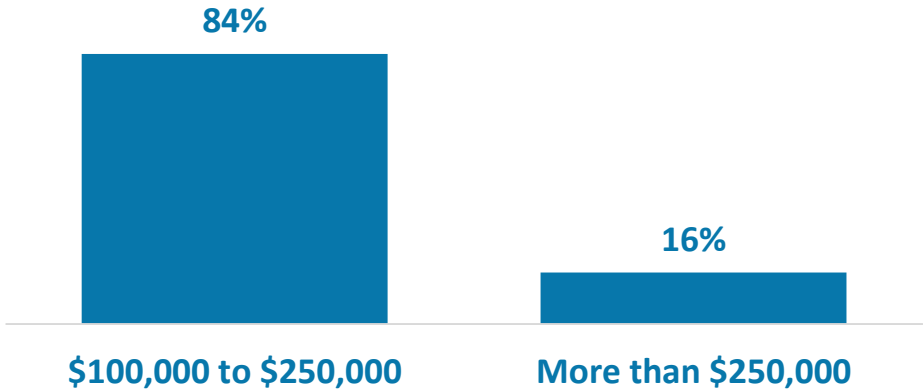
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Consumer Profile*

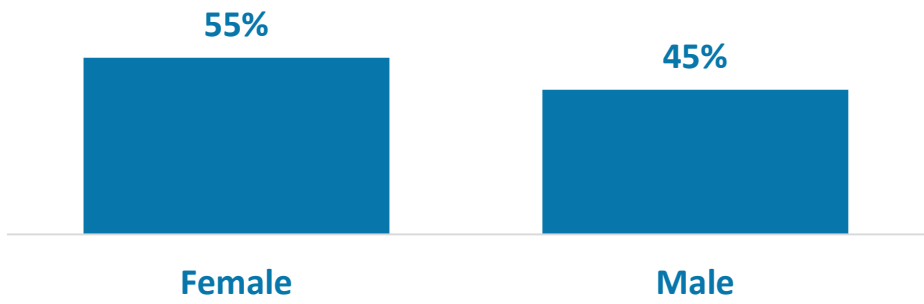
AGE



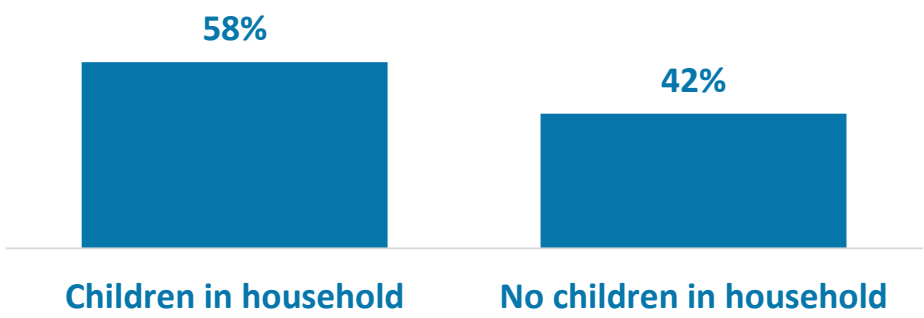
HOUSEHOLD INCOME



GENDER



HOUSEHOLDS WITH CHILDREN



*Demographic questions were used primarily to screen participants.



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Presented by Downs & St. Germain Research
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