

SOUTH WALTON FLORIDA

Consumer Sentiment Study
May 19th, 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 2nd wave of multiple waves of the survey to see how consumer sentiment changes over time.



Research Methods

Data were collected through online surveys with 300 consumers in Atlanta, Nashville, Houston, Dallas, Birmingham, and New Orleans/Baton Rouge

- Wave 1 - April 27th to 28th
- Wave 2 - May 12th to 13th

Consumers were adults between 21 - 70 years old who earned at least \$100,000 per year in household income, served as a key household vacation decision-maker, and had stayed in paid accommodations in 2019.





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Key Takeaways



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Key Takeaways: Safety

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The **CDC** remains the most trusted source for telling consumers when it is safe to travel, but trust in the CDC has dropped in the past 3 weeks



Compared to April, consumers now **feel safer traveling, in general, and more specifically:**

- Going to the beach
- Going to an outdoor attraction
- Staying in a vacation rental home
- Going to a bar or restaurant



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



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Key Takeaways: Future Travel

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2 in 3 consumers still plan to take a vacation or getaway **within a month** of COVID-19 passing- the same since April



Consumers continue to say that **uncrowded areas and places that can be driven to** will be their most likely destinations when it is safe to travel



2 in 5 consumers continue to say they will visit **South Walton** once it is deemed safe to travel



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Key Takeaways: Marketing

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More consumers are ready to see 'normal' destination advertising compared to April



Consumers continue to want to be informed about **what destinations are doing to help** during the crisis and know that **destinations are prioritizing safety**



Consumers **interaction with travel media** has **increased** in the past 3 weeks, as **short online videos** and **online articles on travel** continue to be the most popular travel media



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Other Key Takeaways:

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Scared, unsafe, and **caution** continue to be key feelings associated with travel, yet in the past 3 weeks, consumers have also begun using words such as **ready, good,** and **excited** to describe feelings about travel



Almost half of consumers have been **negatively impacted financially** by COVID-19, and they will **take fewer and shorter vacations**

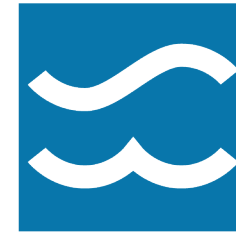


17% of consumers **traveled** in the past 3 weeks, more so for leisure than work



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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

Trust in the CDC and in federal government has dropped in the past 3 weeks

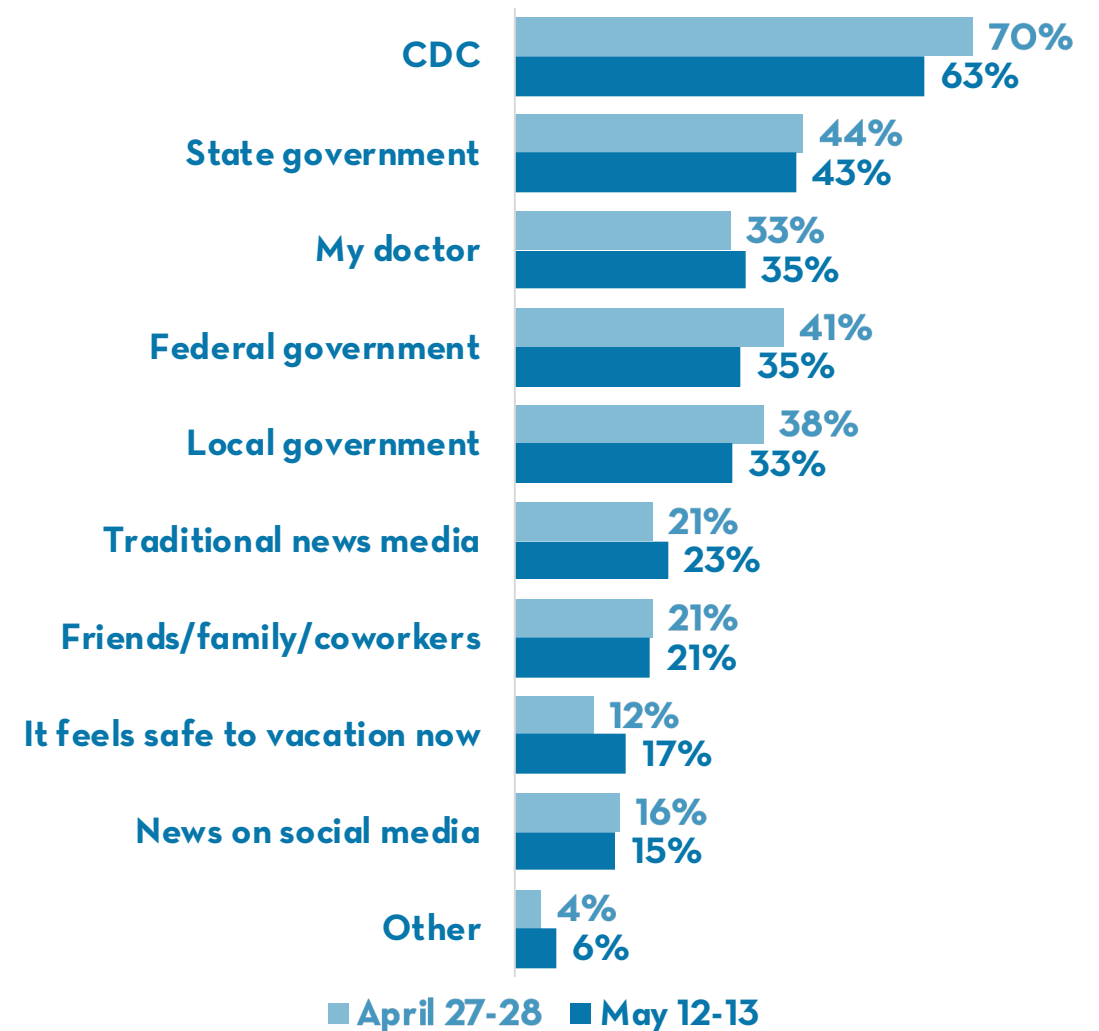
More consumers in mid-May feel it is safe to vacation right now



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TRUST TO TELL YOU IT'S SAFE TO VACATION AGAIN*

10



*Multiple responses permitted.

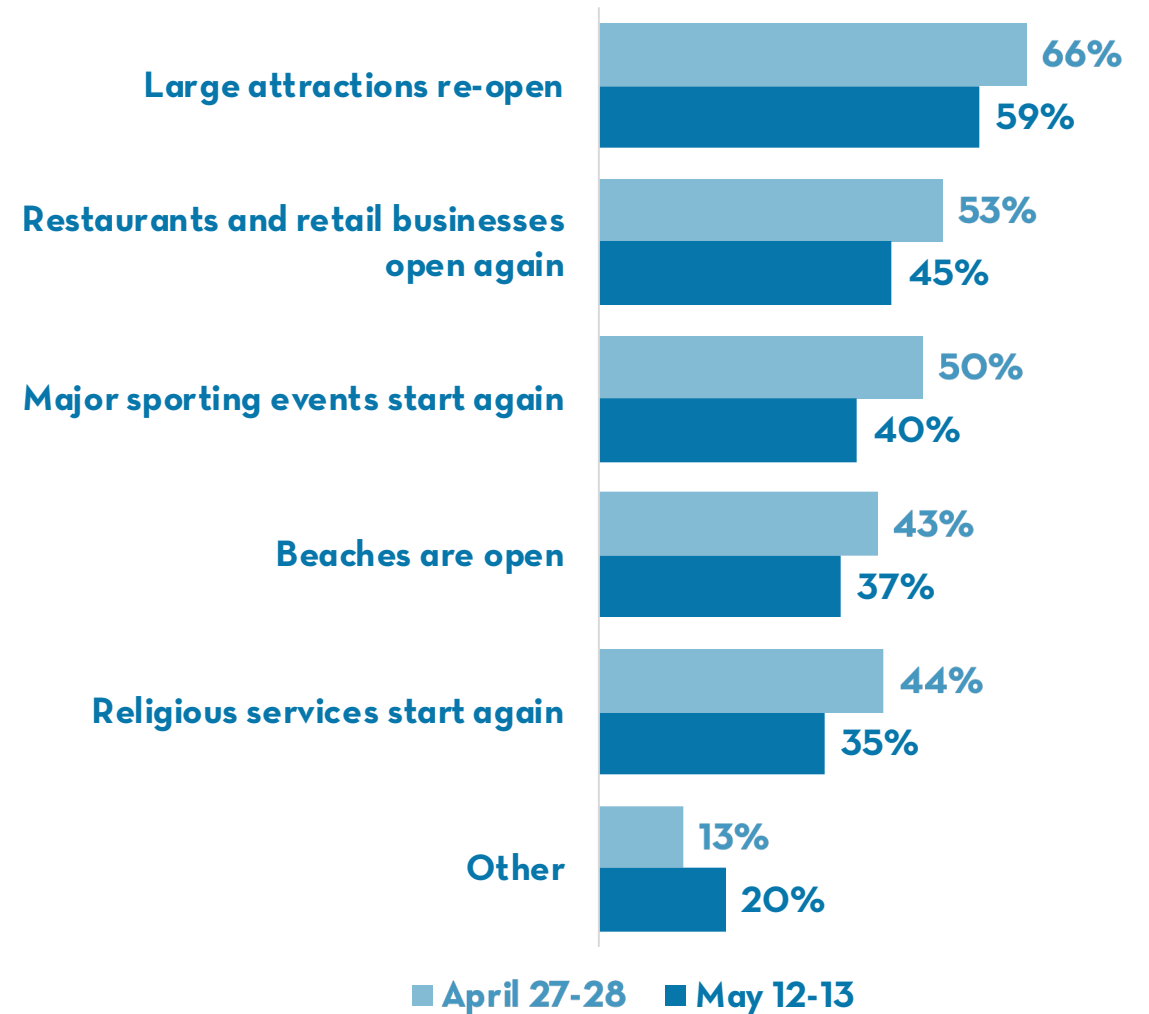
Opinions on Travel Safety Indicators

6 in 10 consumers believe that it will be safe to travel again **when large attractions re-open**, but consumers also look to re-opening of **restaurants** and **retail stores** as an indicator of travel safety

As restaurants and retail stores have reopened in many locations in the past 3 weeks, using their reopening as a sign post for travel safety has decreased

IT WILL BE SAFE TO TRAVEL AGAIN WHEN....*

11



*Multiple responses permitted.

Travel Safety Timeline

The travel window is slightly longer now than it was in April

- In April, the typical consumer was ready to travel in 68 days
- In early May, the typical consumer was ready to travel in 70 days

Consumers feelings are mixed as to when it will be safe to take a long weekend getaway or vacation

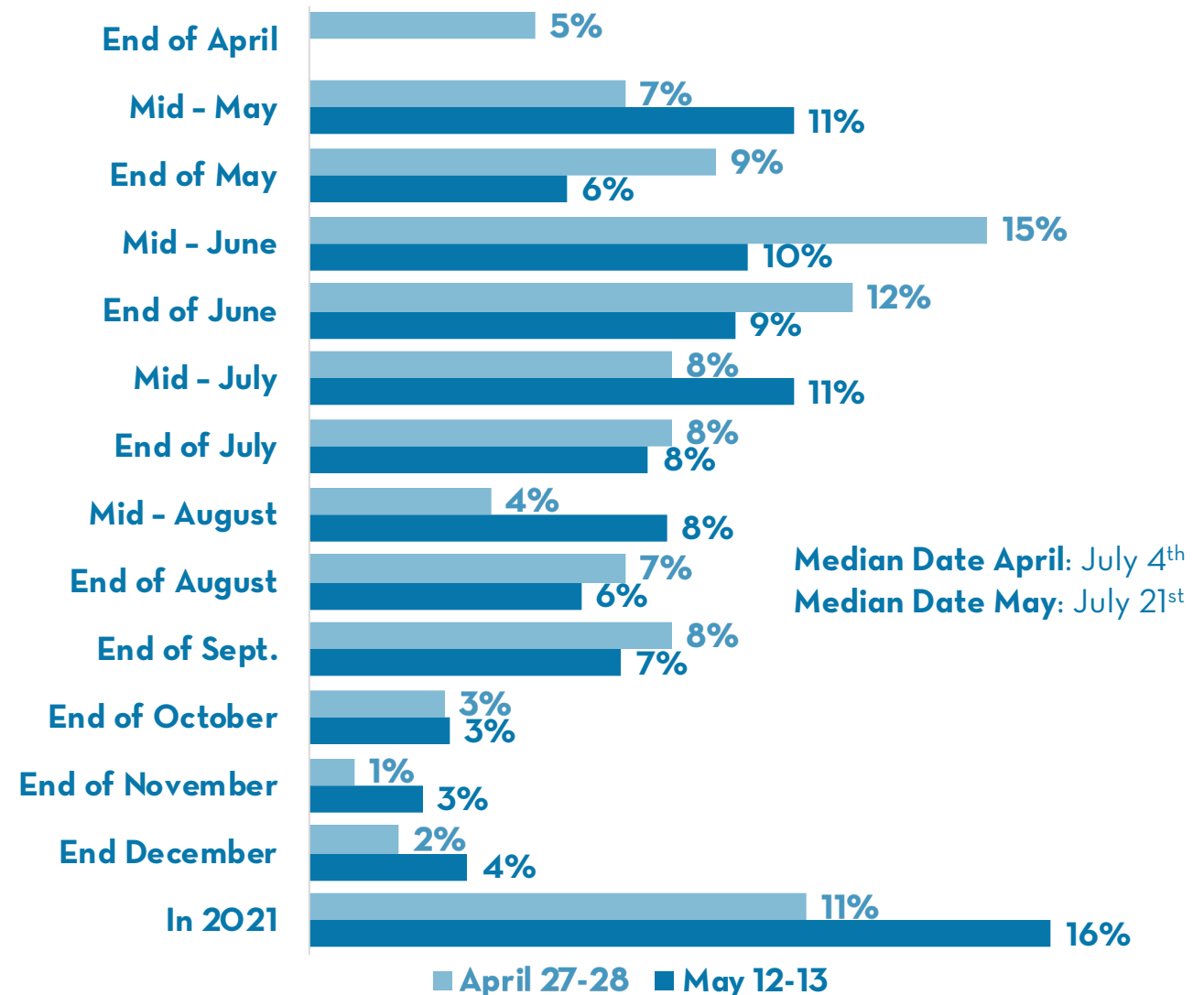
A plurality of consumers continue to believe it will not be safe to travel until **2021**



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WHEN IT WILL BE SAFE TO TAKE VACATIONS

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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**

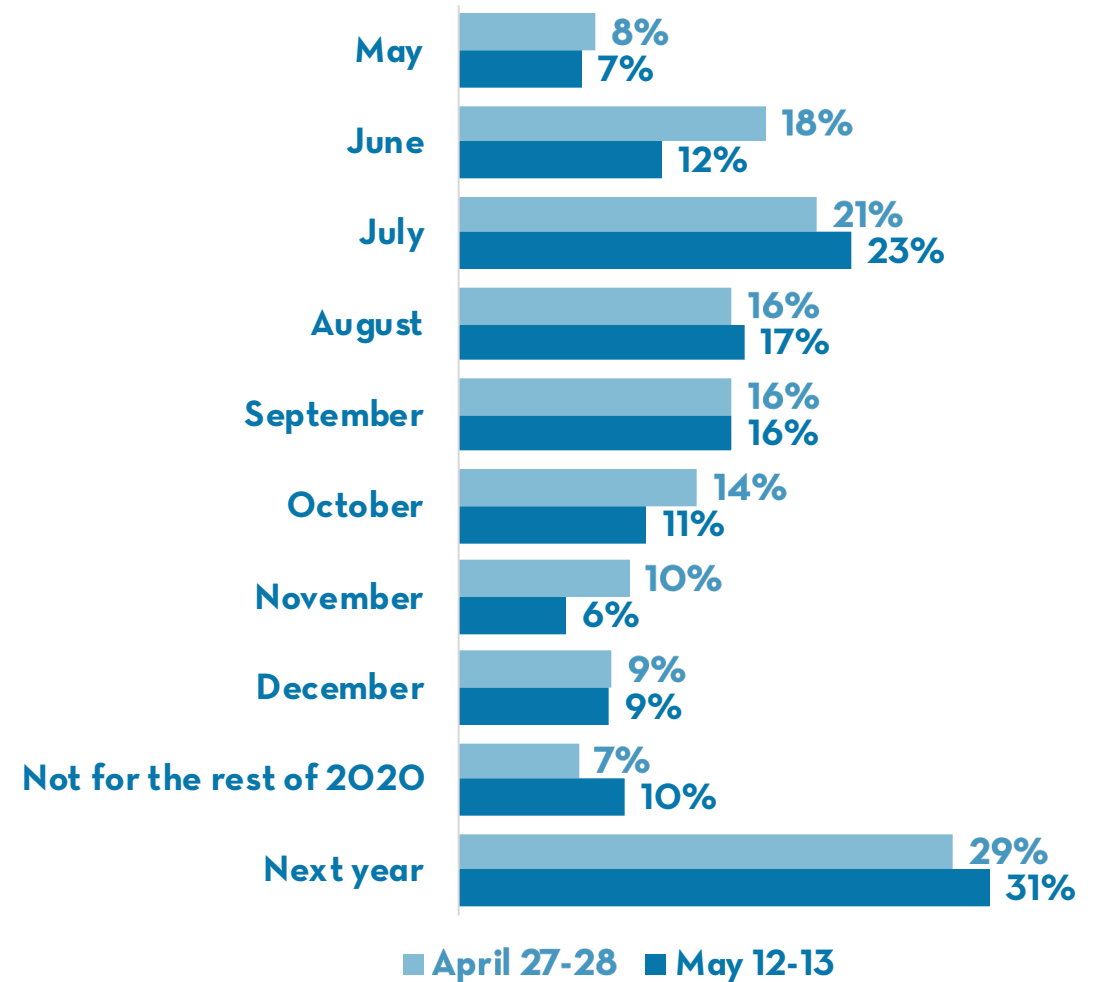
Compared to April, more consumers in early May are delaying travel until 2021



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PLANNING A VACATION FOR THE FOLLOWING MONTHS*

13



*Multiple responses permitted.

Perception of Safety in Travel Activities

Consumers are now comfortable traveling, in particular:

- Going to the beach
- Going to an outdoor attraction
- Staying in a vacation rental home
- Going to a bar or restaurant

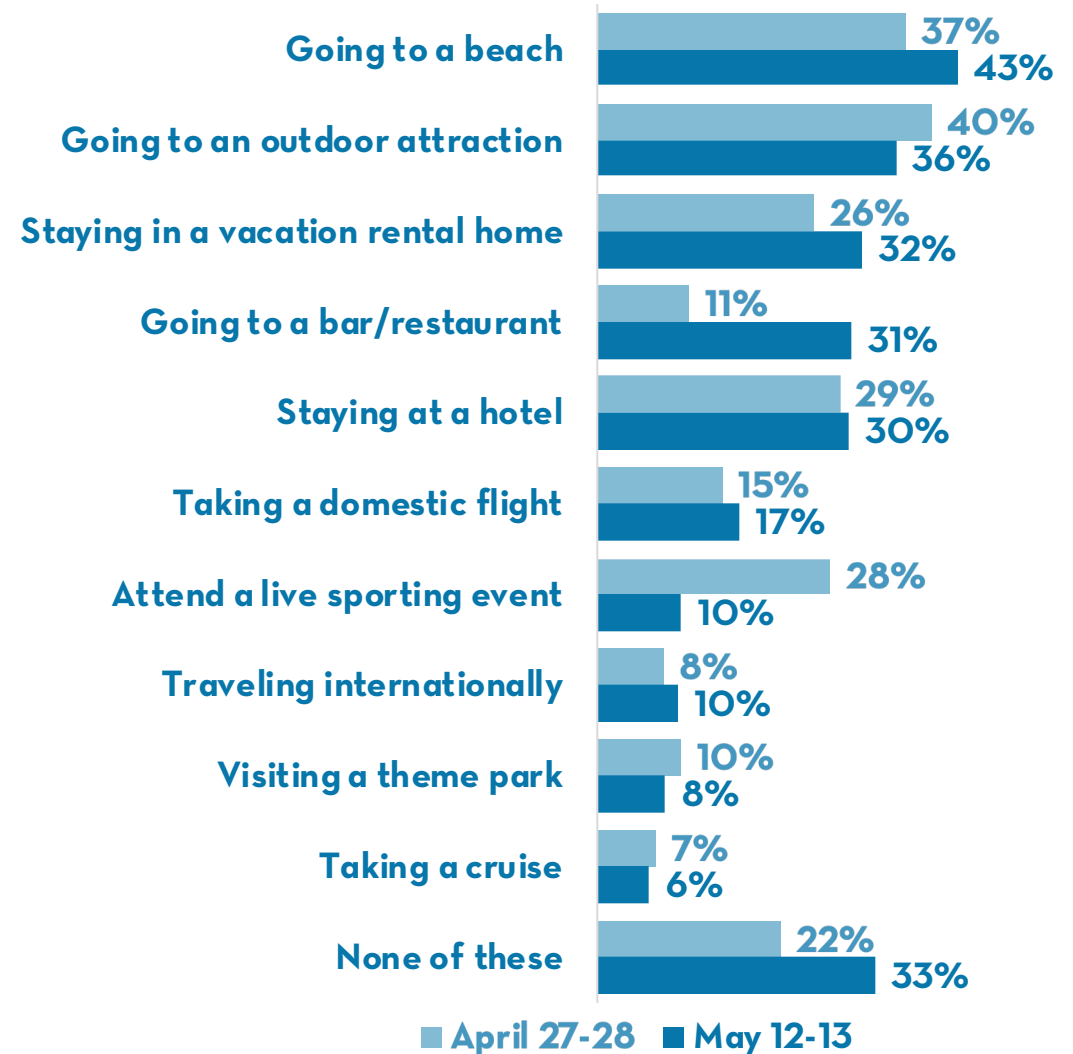
Yet, there was an increase of consumers who do not feel safe participating in any travel-based activities right now



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FEEL SAFE DOING THE FOLLOWING*

14



*Multiple responses permitted.

Likelihood of Imminent Travel after COVID-19

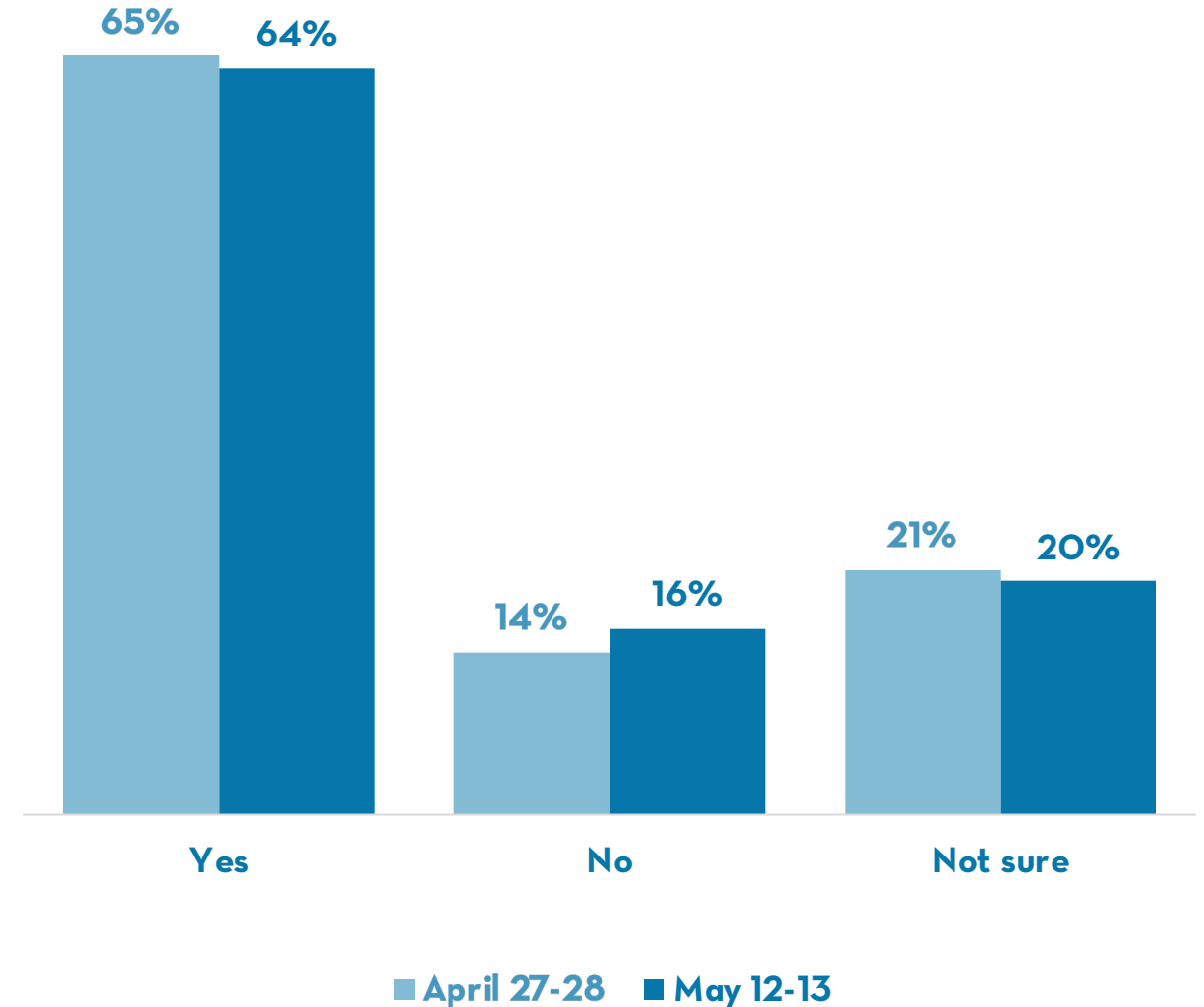
There continues to be indications of pent up travel demand as **2 in 3** consumers remain interested in taking a long weekend or vacation within a month or so after COVID-19 seems to be over



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DEFINITELY TAKE A LONG WEEKEND OR VACATION
WITHIN A MONTH AFTER IT IS DEEMED SAFE TO
TRAVEL

15



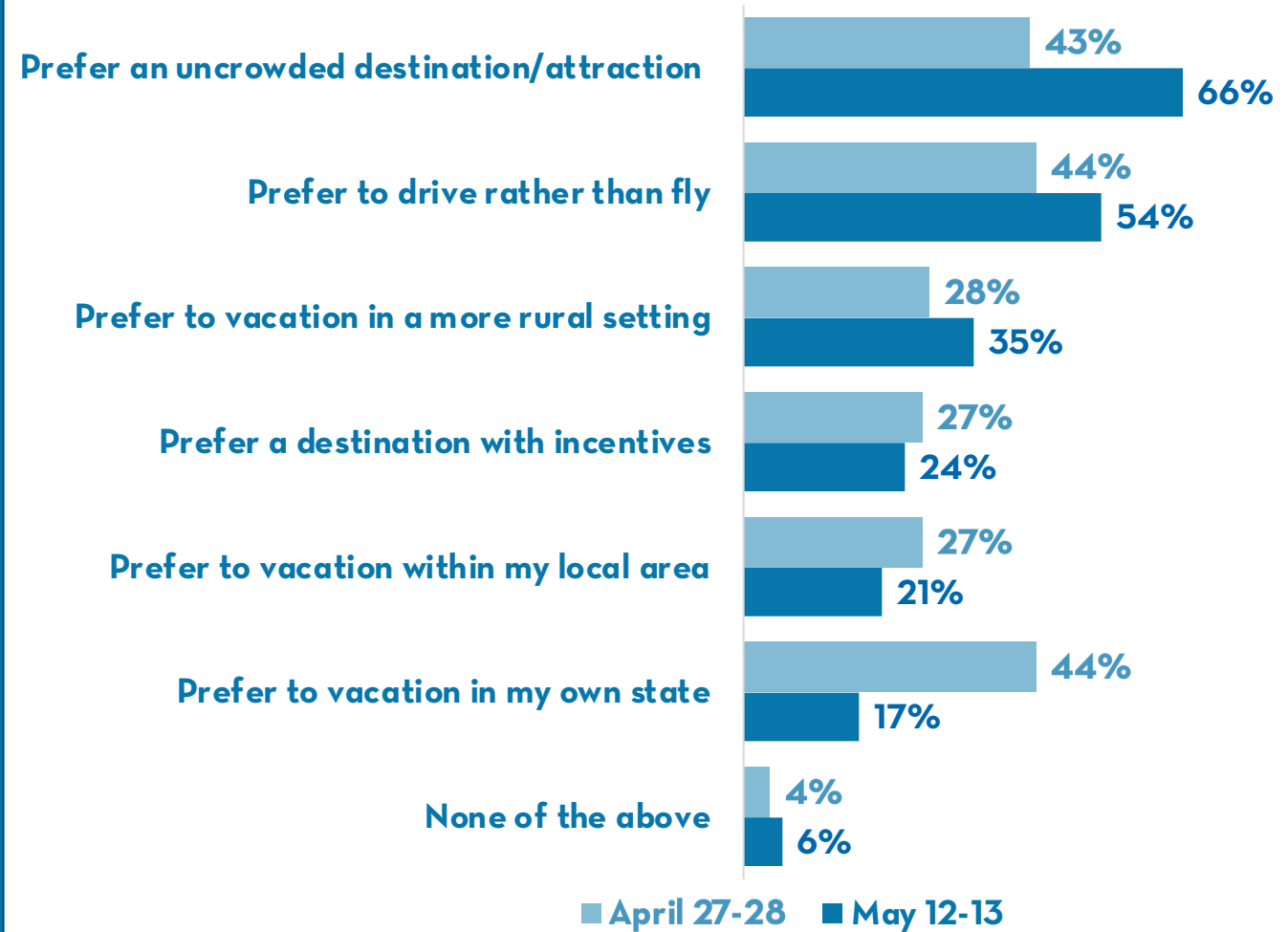
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Travel Preferences after COVID-19

Compared to April, once it is safe to travel again, consumers are now more likely to visit **an uncrowded destination/attraction** where they are able to **drive** to

ONCE IT IS DEEMED SAFE TO TRAVEL AGAIN, WHICH
DO YOU PREFER?*

16

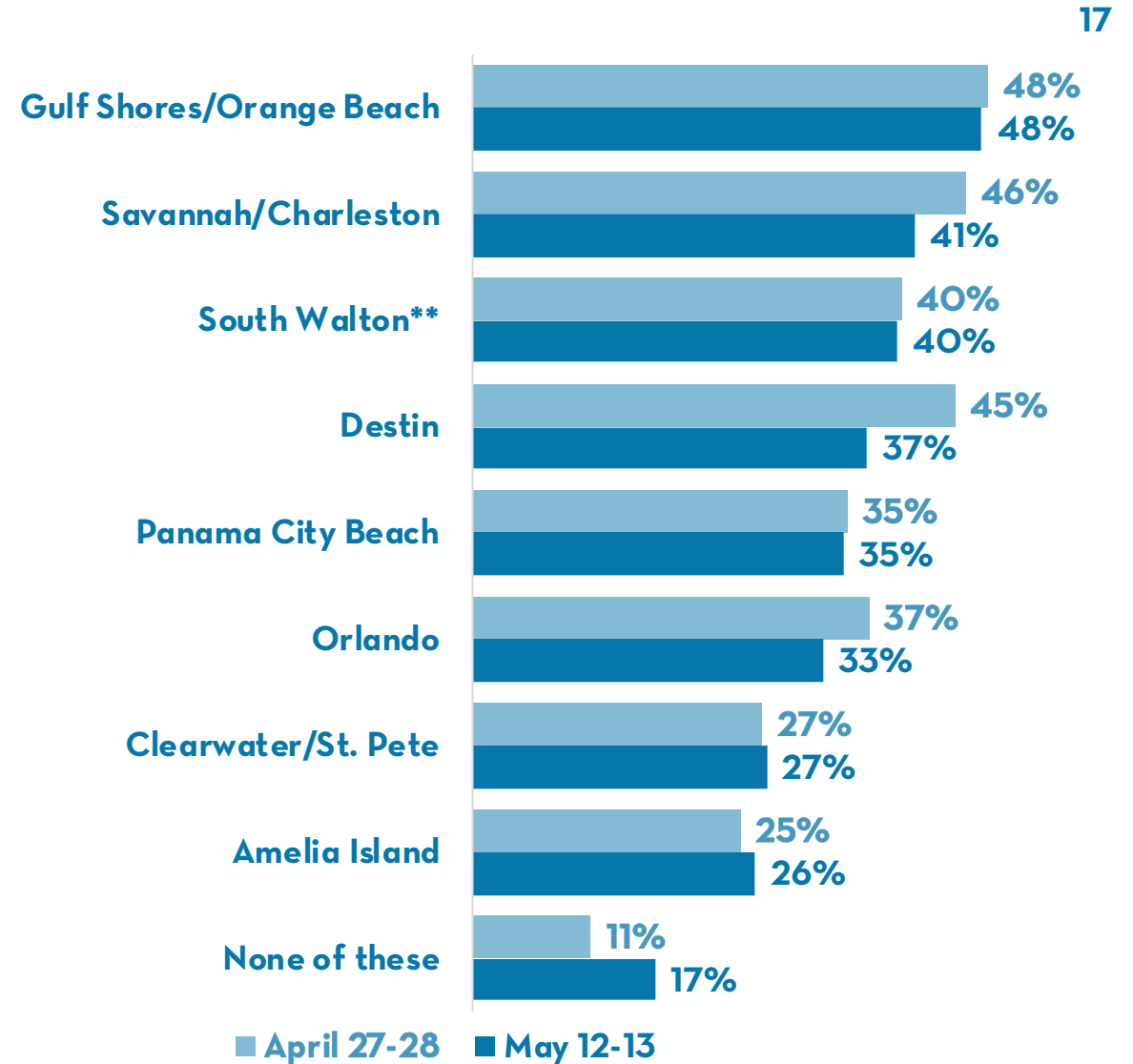


*Multiple responses permitted.

Travel Destinations to Consider after COVID-19

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

CONSIDER VISITING AFTER COVID-19 PASSES*



*Multiple responses permitted.

**South Walton was defined by listing beach communities.

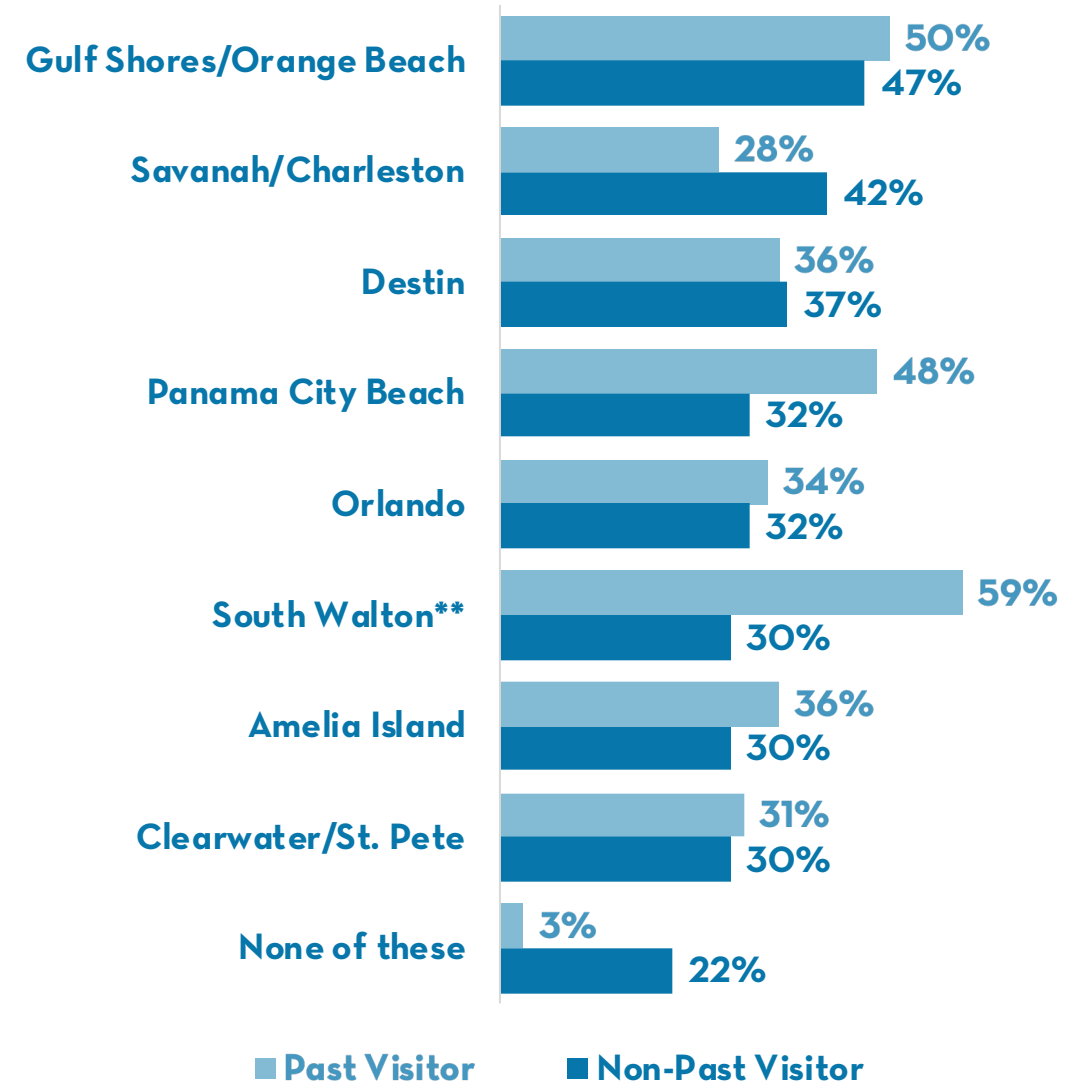
Travel to South Walton

Past visitors were twice as likely as non-visitors to consider coming to South Walton after COVID-19 passes.

Consumers who have not been to South Walton previously were more likely to consider **Gulf Shores/Orange Beach** or **Savannah/Charleston**

CONSIDER VISITING AFTER COVID-19 PASSES* Past SW Visitors vs. Non-Visitors

18



*Multiple responses permitted.

**South Walton was defined by listing beach communities.

Destination Advertising during COVID-19

Interest in destination advertising has increased since April – now only 14% do **not** want to be exposed to destination advertising

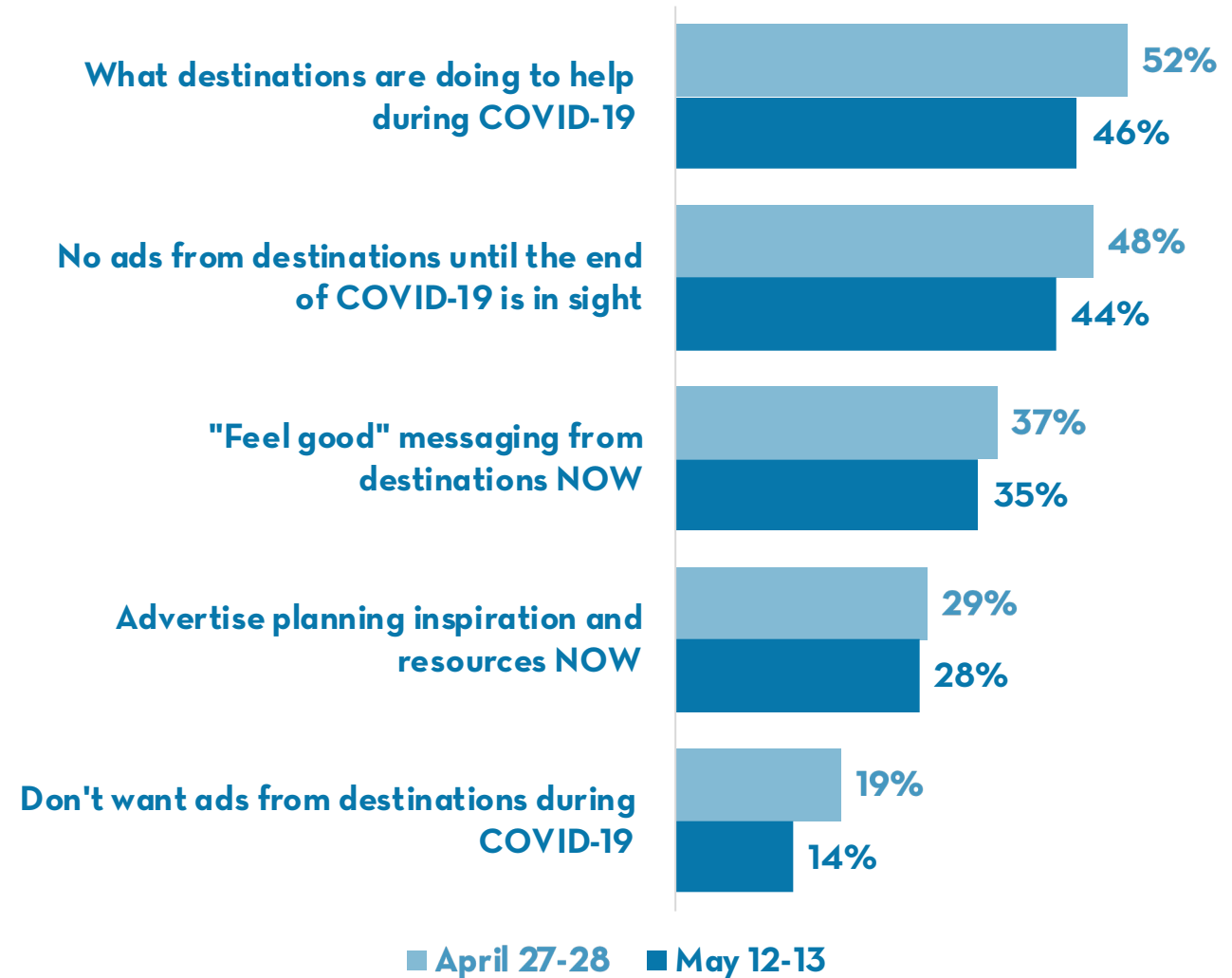
Yet, almost half of consumers still want advertising to focus on what destinations are doing to help with the crisis



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PREFERENCES REGARDING ADVERTISING MESSAGING FROM DESTINATIONS

19



*Multiple responses permitted.

Continuation of Travel Advertising

The window for resuming normal advertising is the same as it was in April

- In April, the window to resume normal ads was 47 days
- In early May, the window to resume normal ads was 47 days

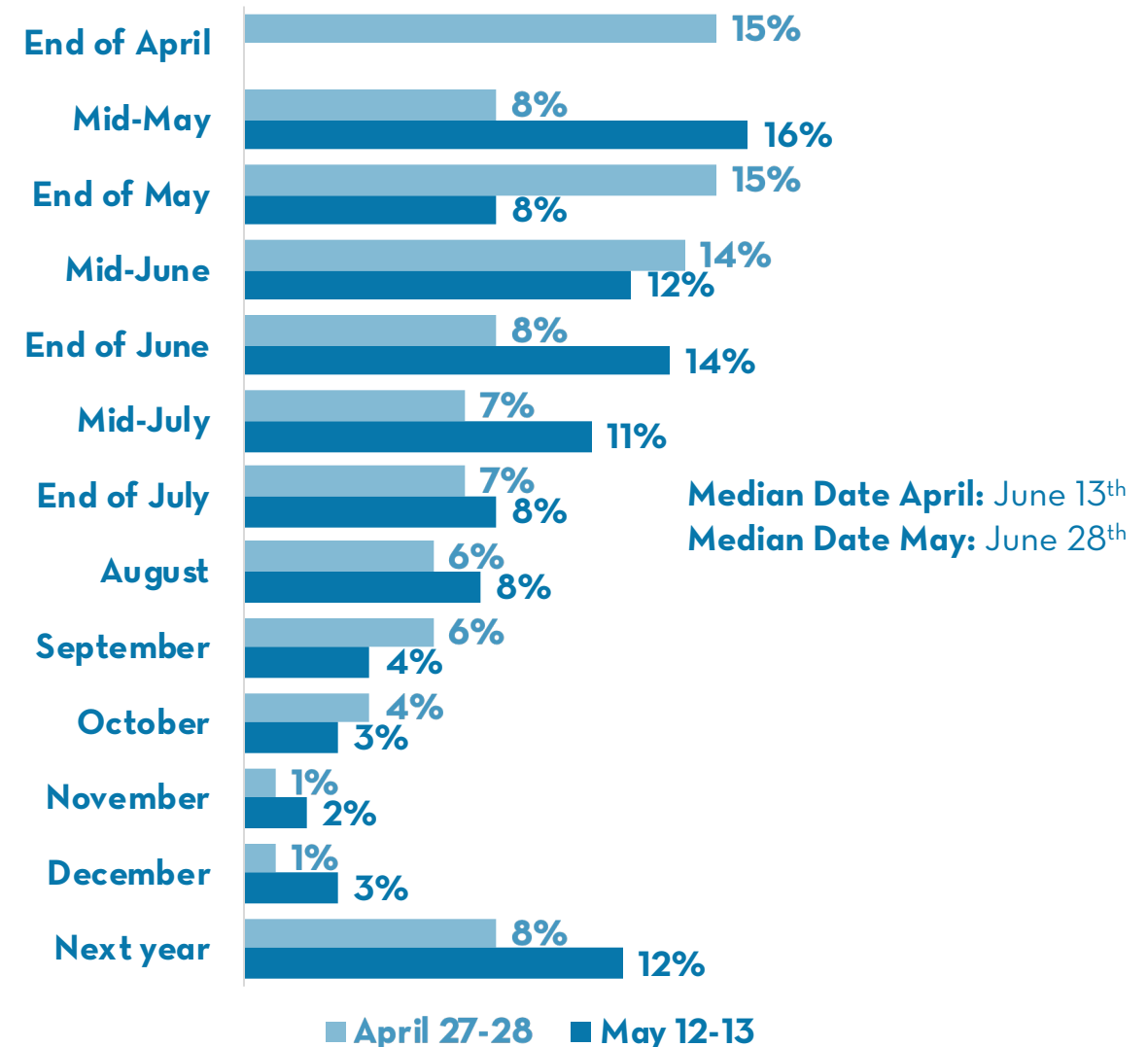
Yet, there is still no consensus among consumers regarding when to resume normal advertising



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APPROPRIATE FOR DESTINATIONS TO RESUME NORMAL ADVERTISING

20

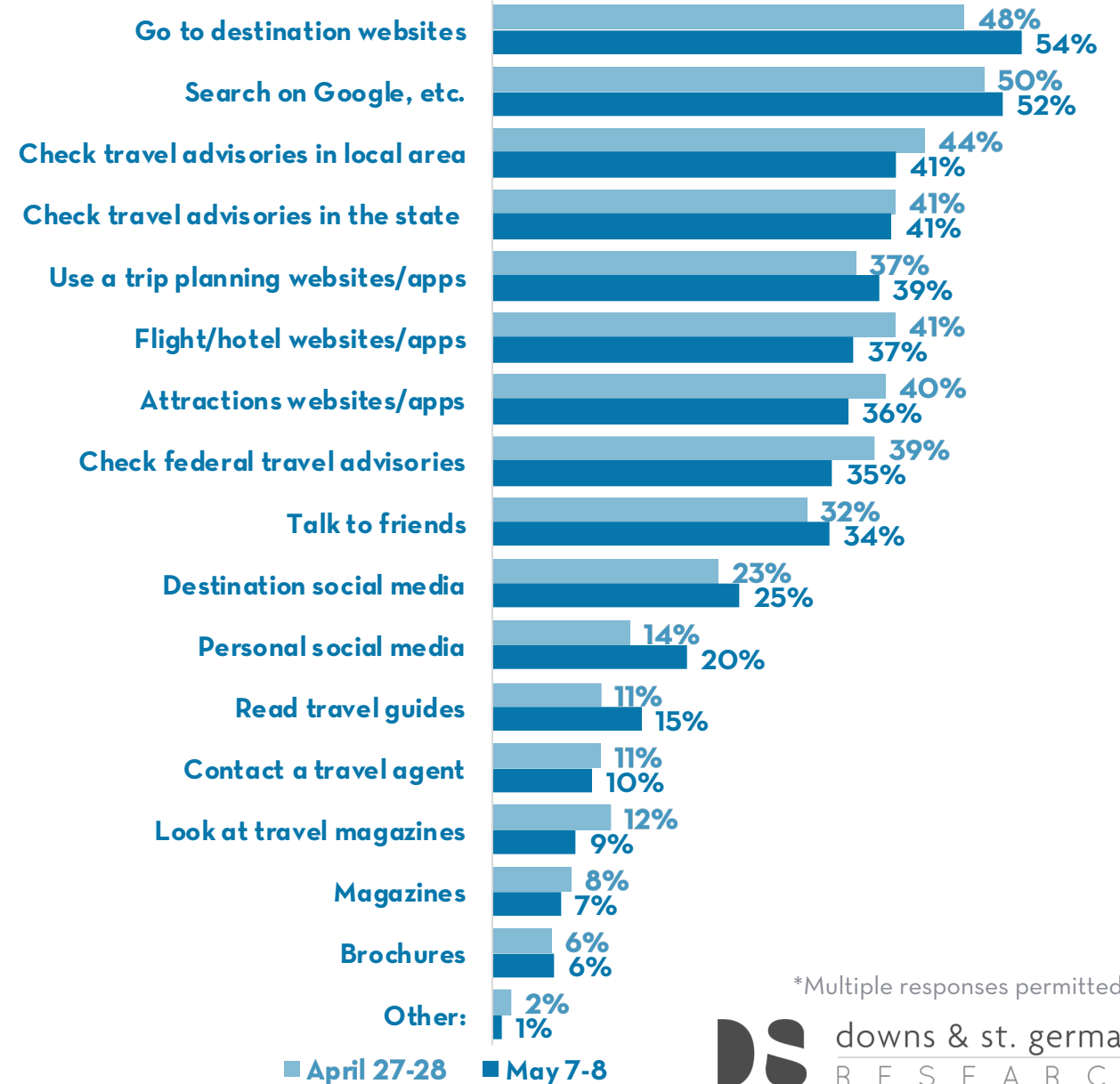


Future Travel Planning Resources

Over half of consumers continue to rely on destination websites and Google searches to help them plan their trips when they are ready to travel again

PLANNING SOURCES WHEN READY TO TRAVEL AGAIN*

21



*Multiple responses permitted.

Travel Information in Destination

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

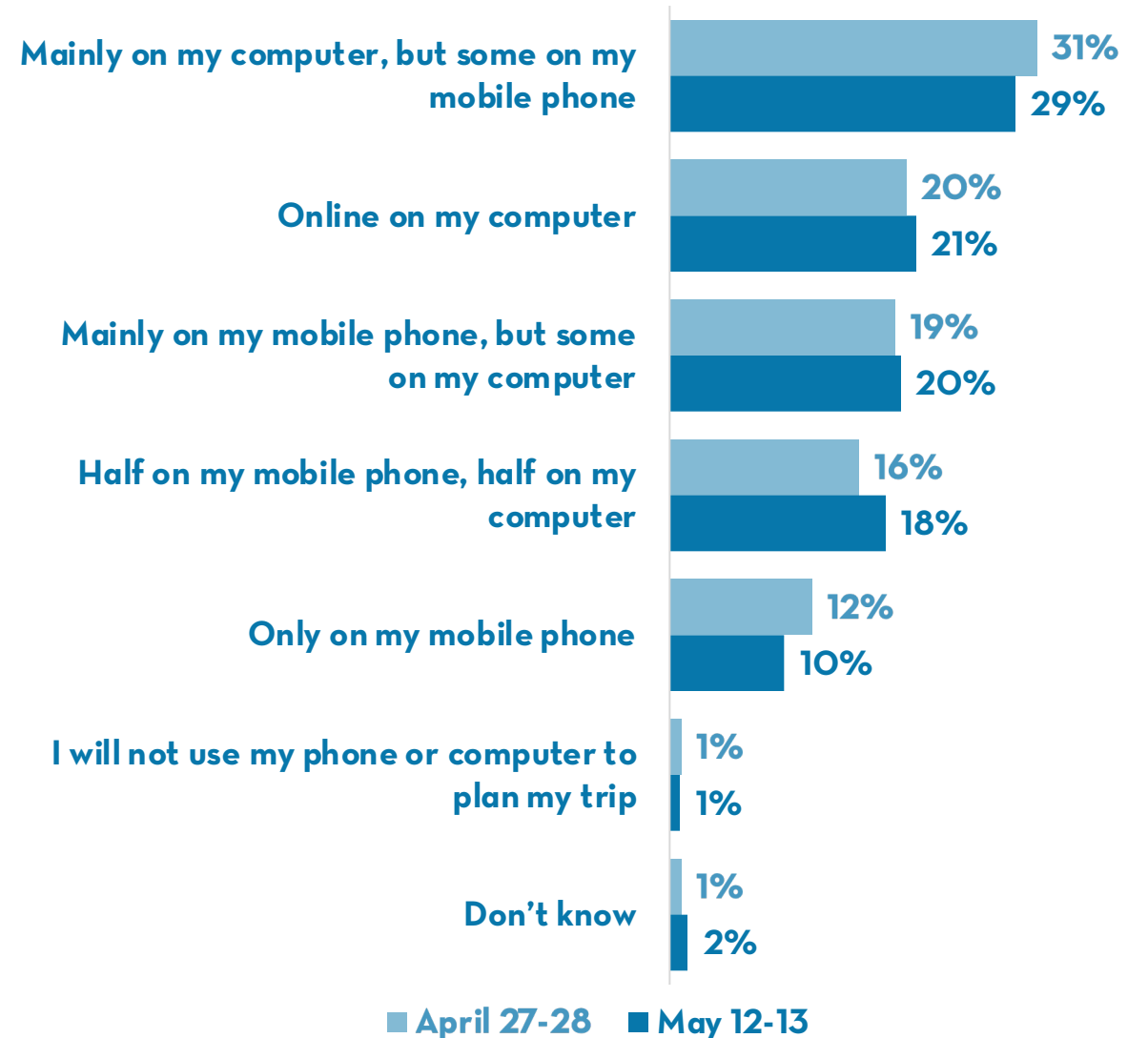
Visitors are **unlikely** to plan their travel without a phone or a computer



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COMPUTER vs. PHONE POST COVID-19 PLANNING

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Recent Interactions with Travel Media

Compared to April, slightly more consumers are interacting with travel media

Yet, 1 in 3 consumers has not interacted with any travel media in the past two weeks

Short online videos and **online articles on travel** continue to be more frequently used travel media



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TRAVEL MEDIA ACTIVITY IN THE PAST 2 WEEKS*

23



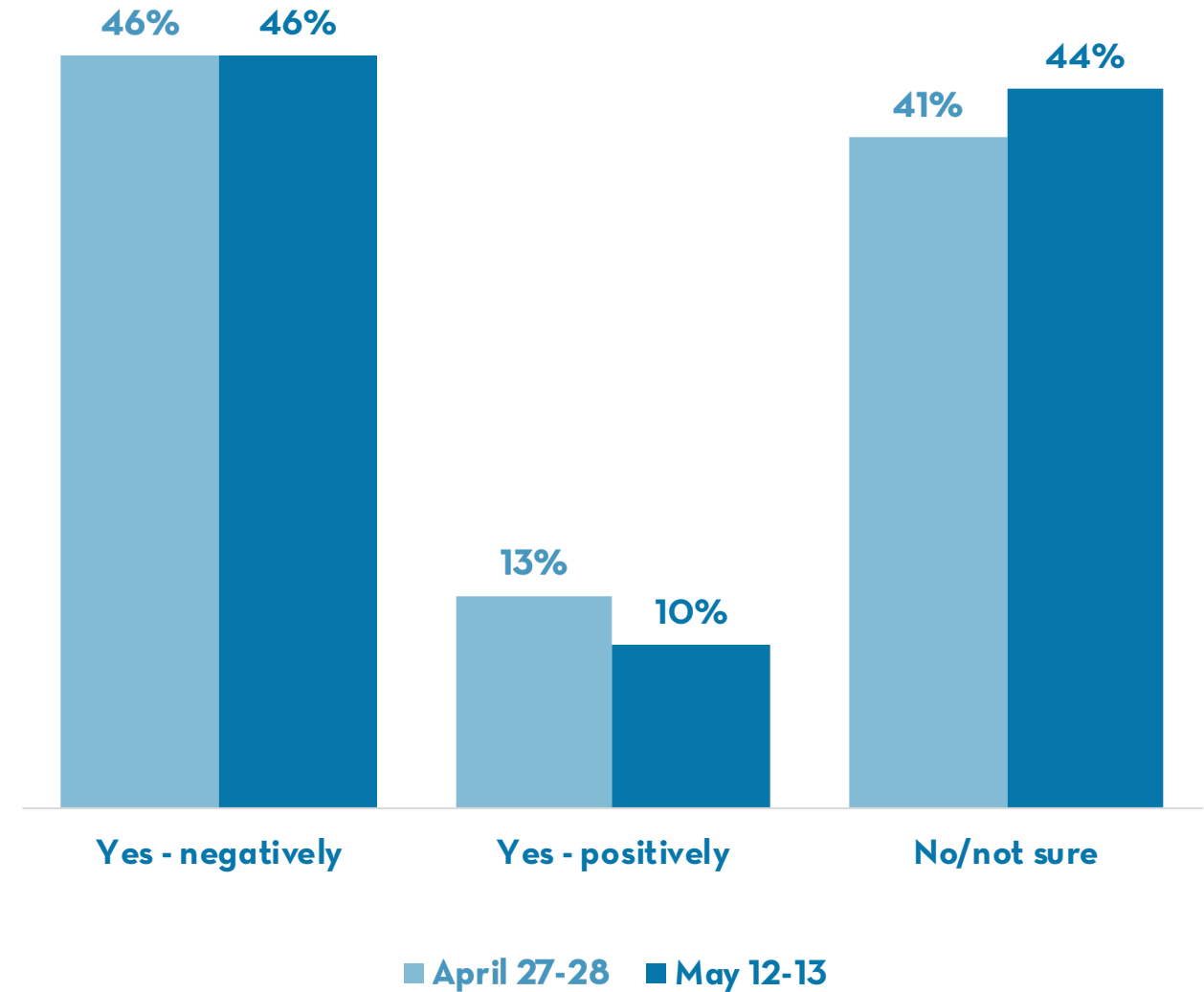
■ April 27-28 ■ May 12-13 *Multiple responses permitted.

Personal Effects of COVID-19

As in April, almost **half** of consumers have been affected financially by the economic downturn due to COVID-19

BEEN AFFECTED FINANCIALLY BY COVID-19

24



Future Travel Plans

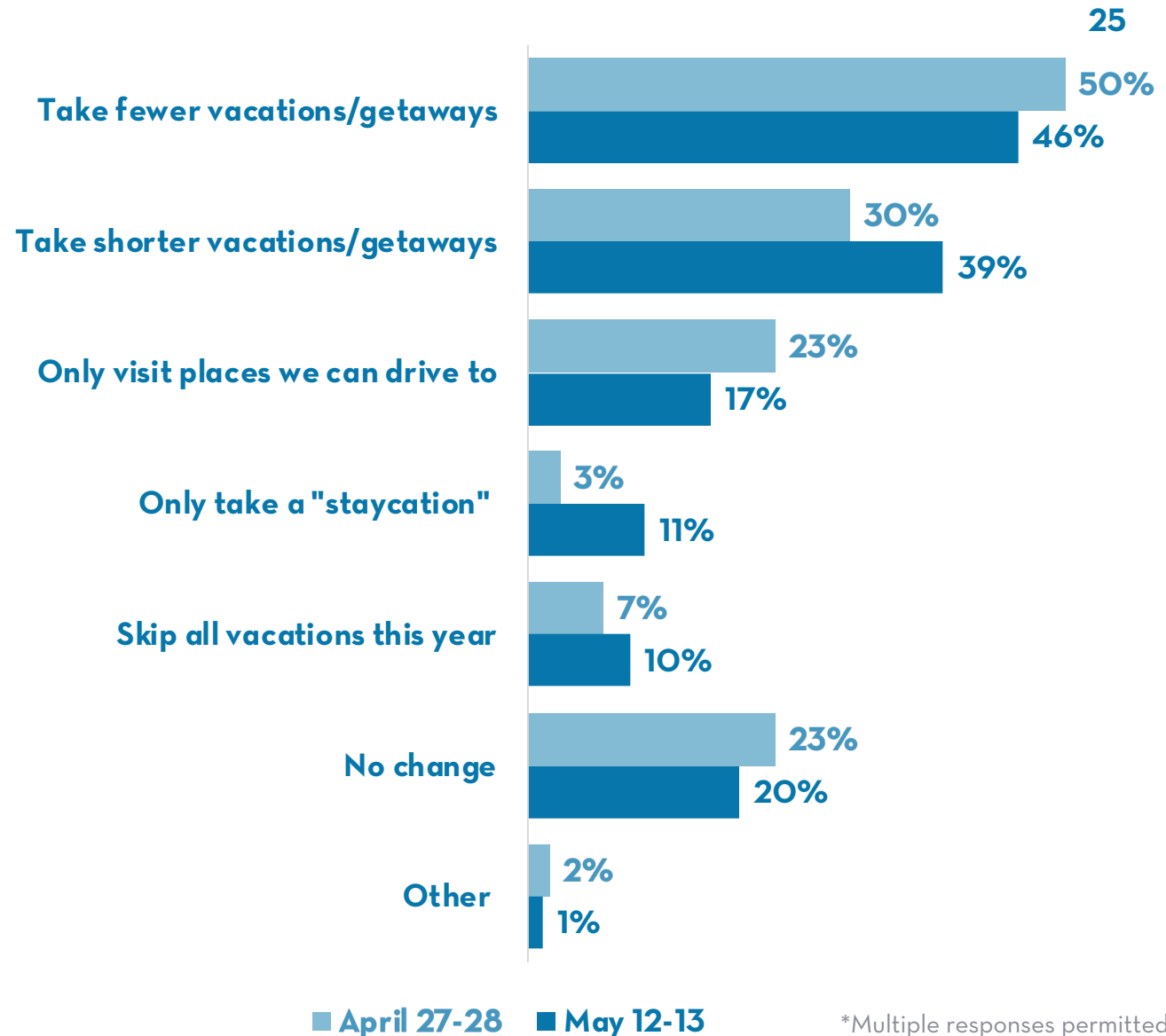
Almost half of consumers who have been impacted financially by COVID-19 will take fewer vacations/getaways

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



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IMPACT OF ECONOMIC DOWNTURN ON YOUR TRAVEL PLANS*



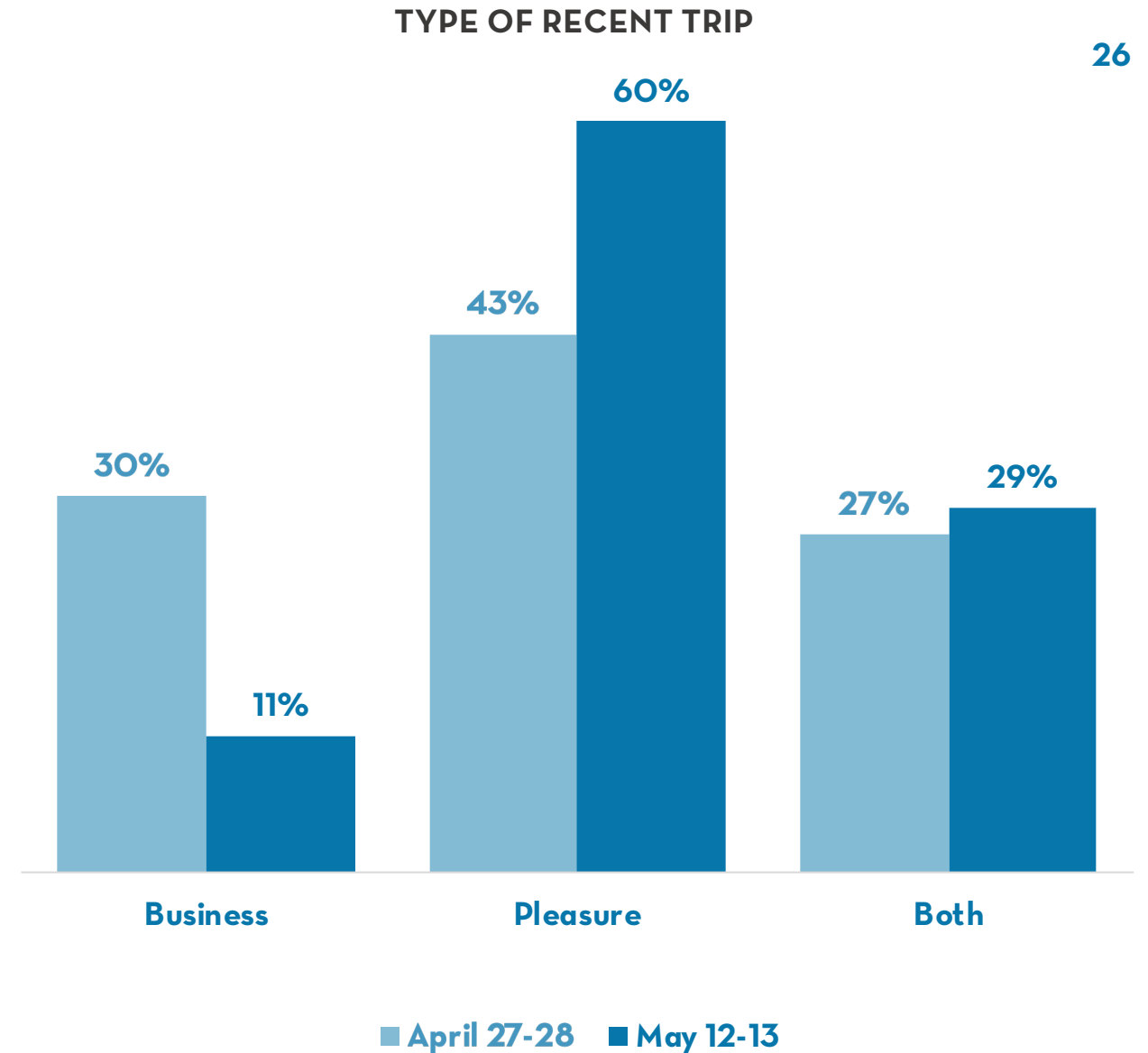
*Multiple responses permitted.

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Recent Overnight Travel

Despite Florida's economy partial opening on May 1, and other states' economies in various forms of opening, **1 in 6** consumers traveled in the past 3 weeks.

Of those who have traveled in the past three weeks; over half was for **pleasure purposes**, a significant increase from April



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Continuation of Travelling Overnight

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

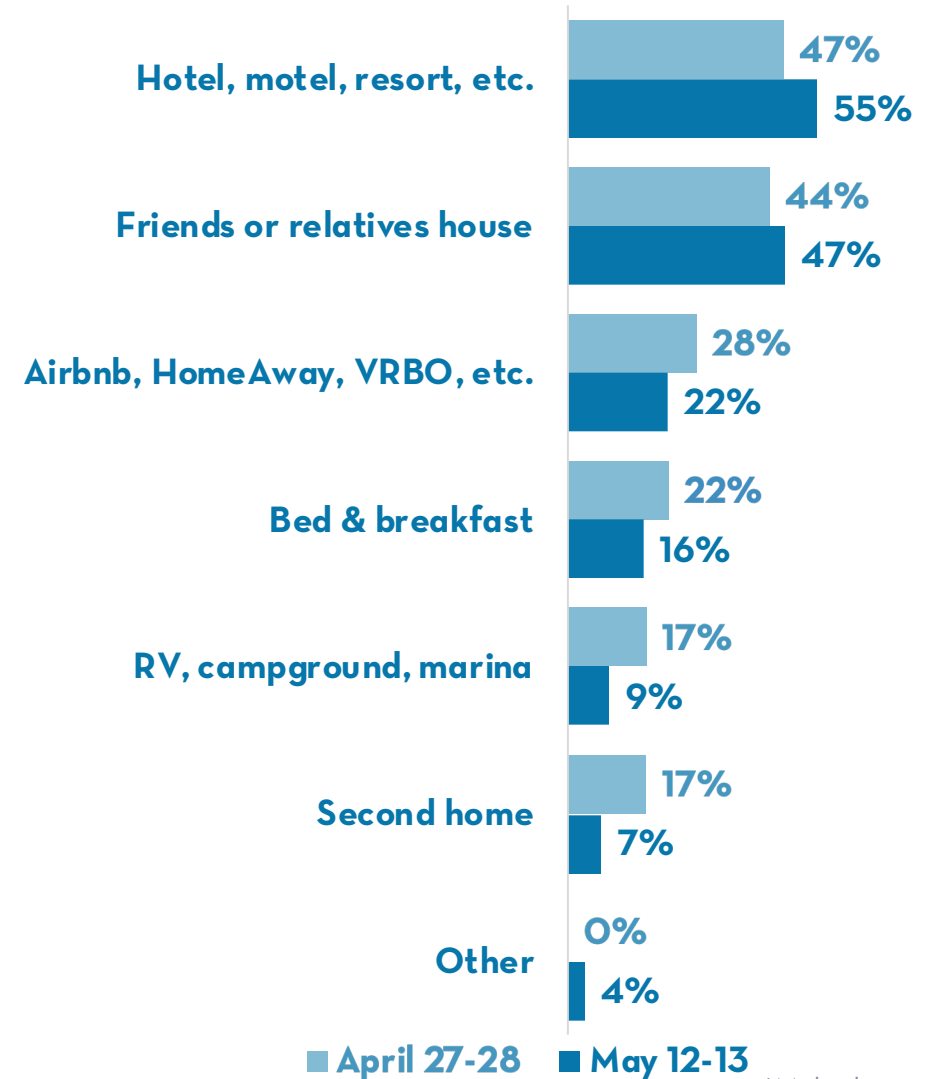
2 in 5 consumers who traveled overnight in the past three weeks stayed with **friends or relatives**



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ACCOMMODATIONS ON RECENT OVERNIGHT TRIP

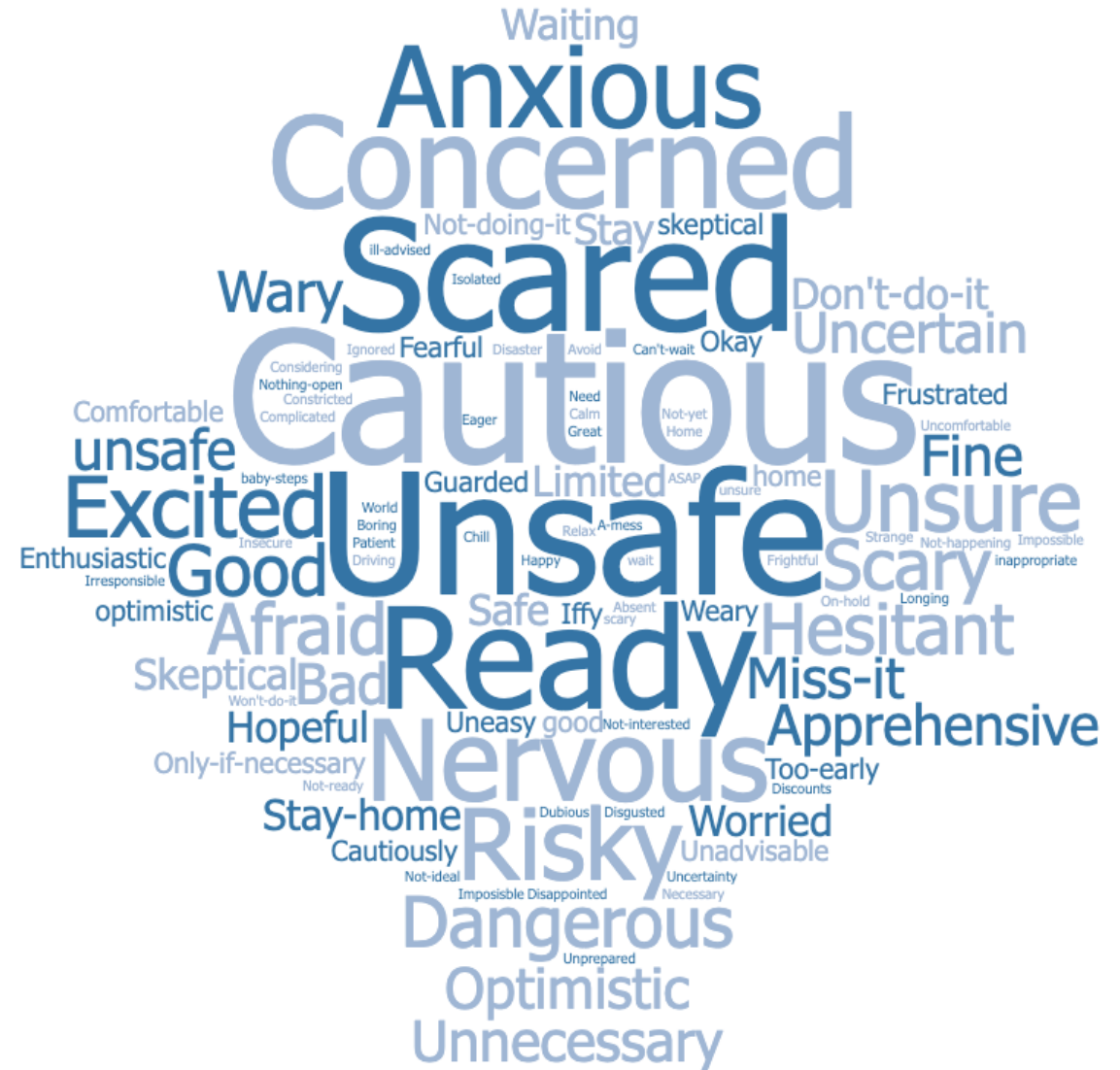
27



*Multiple responses permitted.

Consumers continue to associate travel with a **lack of safety** and feelings of **caution** and **fear**, but since April consumers are beginning to characterize travel with positive words such as **excited, good, and ready**

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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** and introduce **new safety/cleaning protocols** will be most effective at enticing them to visit

ADVERTISING MESSAGING THAT WILL MOTIVATE YOU ONCE IT IS DEEMED SAFE TO TRAVEL*

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



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Consumer Profile

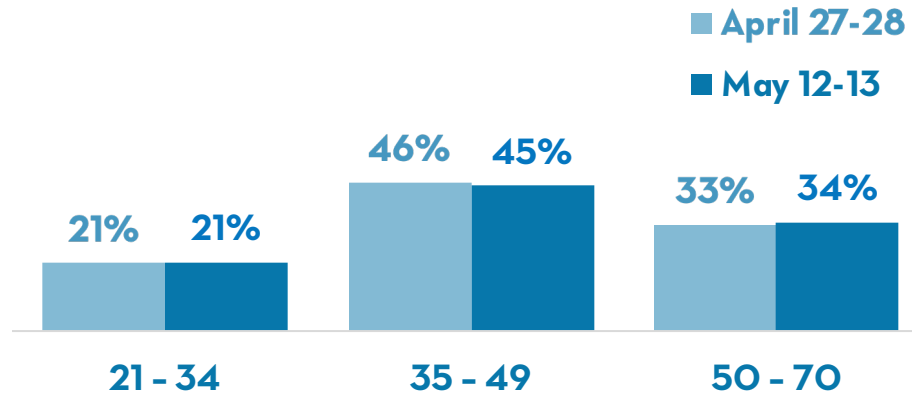


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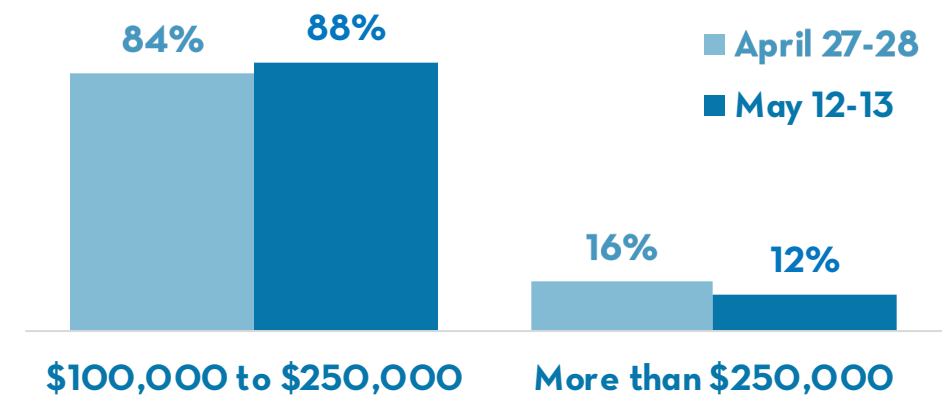
Consumer Profile*

31

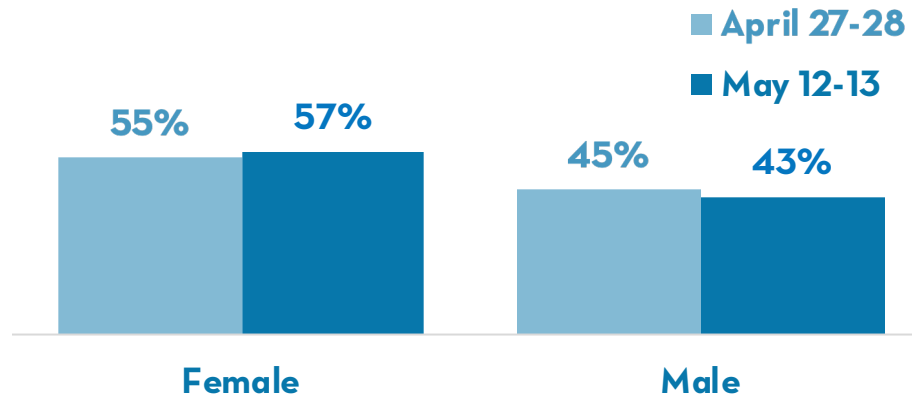
AGE



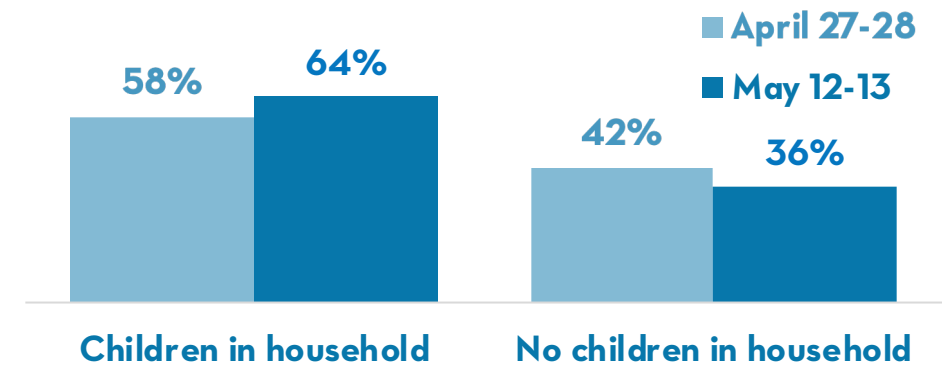
HOUSEHOLD INCOME

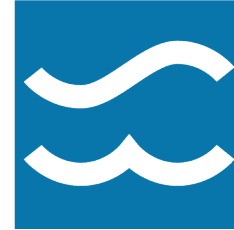


GENDER



HOUSEHOLDS WITH CHILDREN





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Presented by Downs & St. Germain Research
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