



Strategic Marketing and Research

Domestic leisure traveler sentiment in light of coronavirus/COVID-19

Research prepared for the Asheville CVB

March 16, 2020

Disclaimer by Explore Asheville:

It should be acknowledged that this study was conducted March 11-13, 2020.

Dramatic changes have taken place worldwide since then as COVID-19 has spread. Health advisories and governmental mandates have expanded. Accordingly, traveler sentiments have likely changed as well.

Methodology

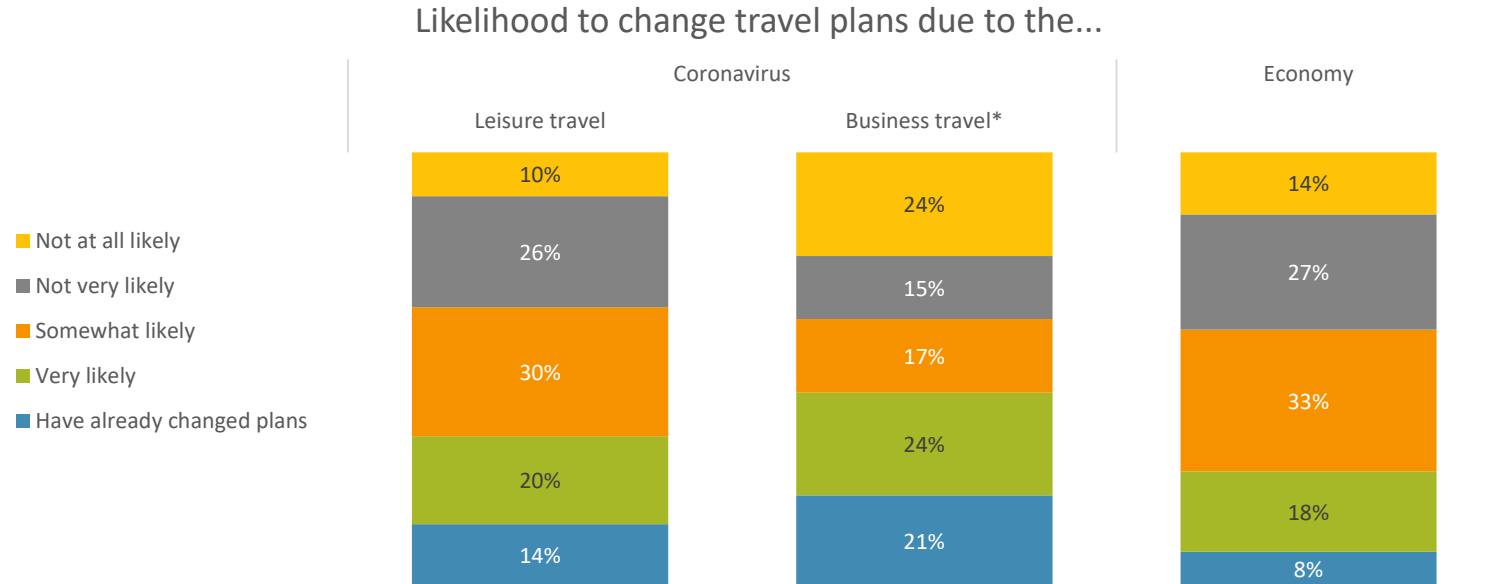
- The survey was an online survey among leisure travelers in key Asheville markets.
- The survey fielded March 11-13, with sample screened to ensure they:
 - Regularly take leisure trips of at least 50 miles from home and/or that include an overnight stay
 - Are leisure travel decision-makers for their households
 - Are 18 years or older
- A total of 2,133 surveys were completed, with the sample distribution shown in the table. The surveys were then weighted to be representative of the population to provide overall findings.
- Where appropriate, the findings are compared to other national research that SMARInsights has done on this topic. This includes a wave of 600 surveys fielded March 6 and a second wave fielded on March 12 of 750 domestic leisure travelers from a national sample, using the same screening criteria as above.
- Data were cleaned, coded, and prepared for analysis.

Market	Surveys
Nearby: Raleigh/Durham, Greensboro/Winston- Salem, Charlotte, NC, Knoxville, TN	640
Atlanta, GA, & Nashville, TN	425
NYC, Washington, DC, Orlando, West Palm Beach & Tampa, FL	665
Cincinnati & Columbus, OH	403
Total	2,133

Domestic leisure traveler sentiment in light of coronavirus/COVID-19
prepared for Asheville CVB

MARCH 16, 2020 REPORT

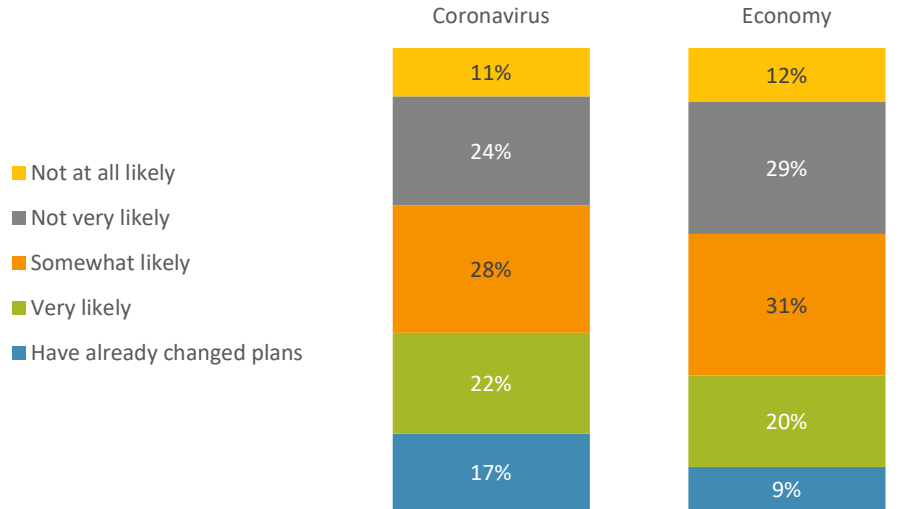
National traveler sentiment snapshot – March 13



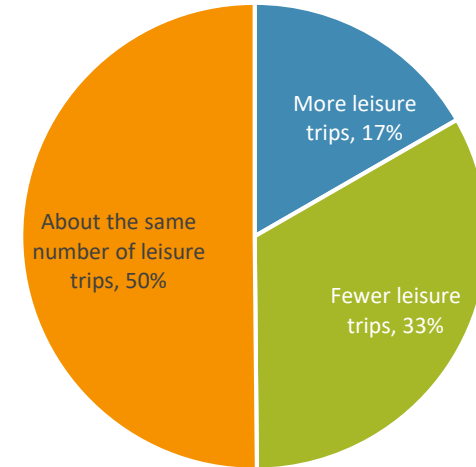
*Results are for the 52% of travelers for whom business travel applies.

Asheville traveler sentiment snapshot – March 13

Likelihood to change travel plans due to the...

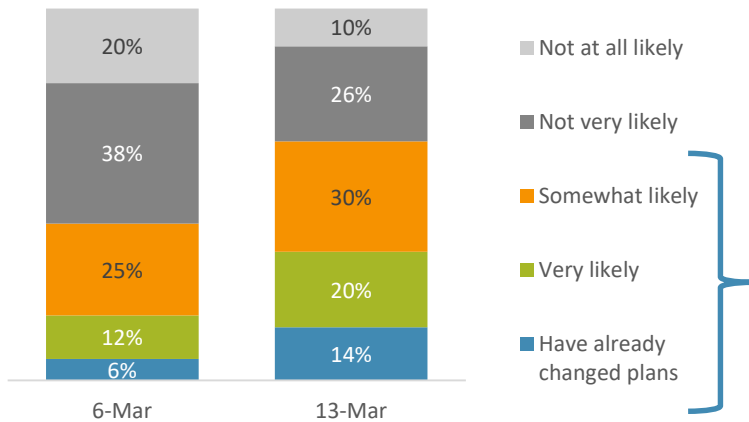


In the next 6 months, do you think you will take...?

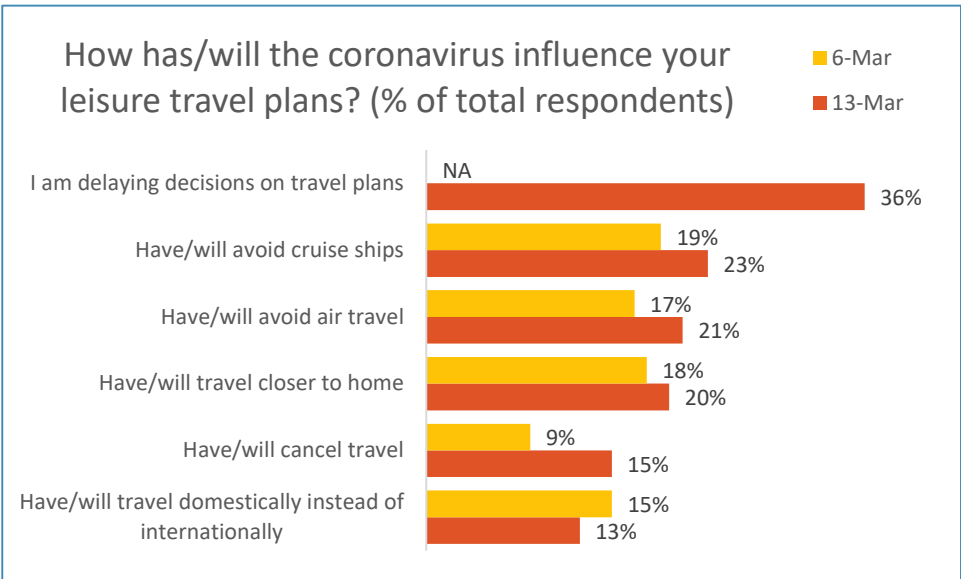


Nationally, travelers are taking a wait-and-see approach to their leisure travel; just over a third are delaying decisions on their leisure travel plans. This is probably a function of how far in the future consumers typically plan travel.

How likely is the coronavirus to change your leisure travel plans?

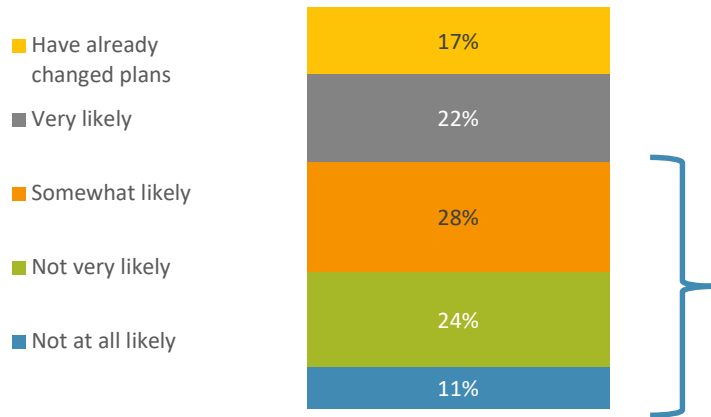


How has/will the coronavirus influence your leisure travel plans? (% of total respondents)

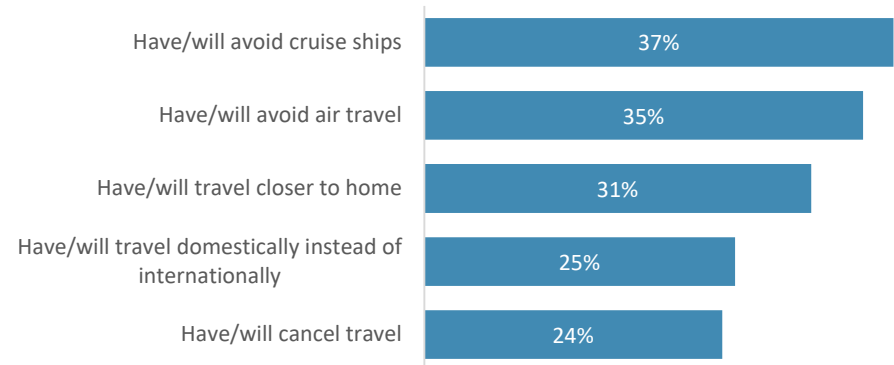


Consumers in Asheville's markets are similar in terms of overall likelihood to change their leisure travel plans.

How likely is the coronavirus to change your leisure travel plans?



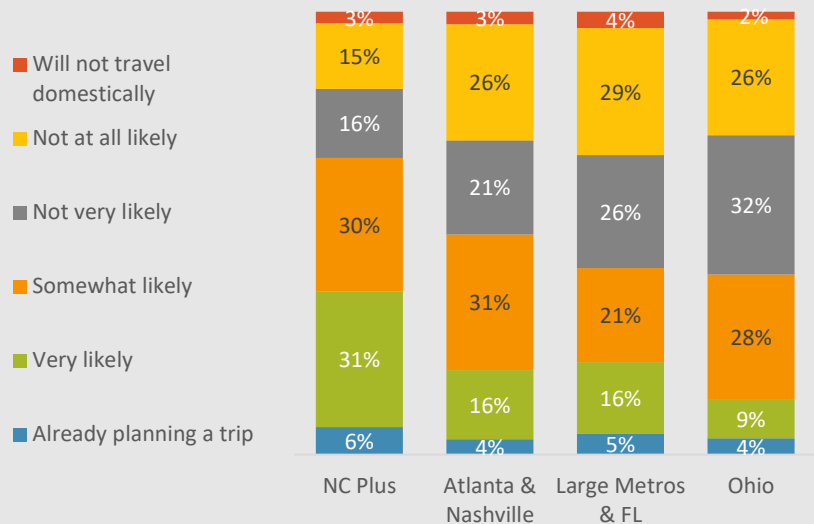
How has/will the coronavirus influence your leisure travel plans?
(% of total respondents)



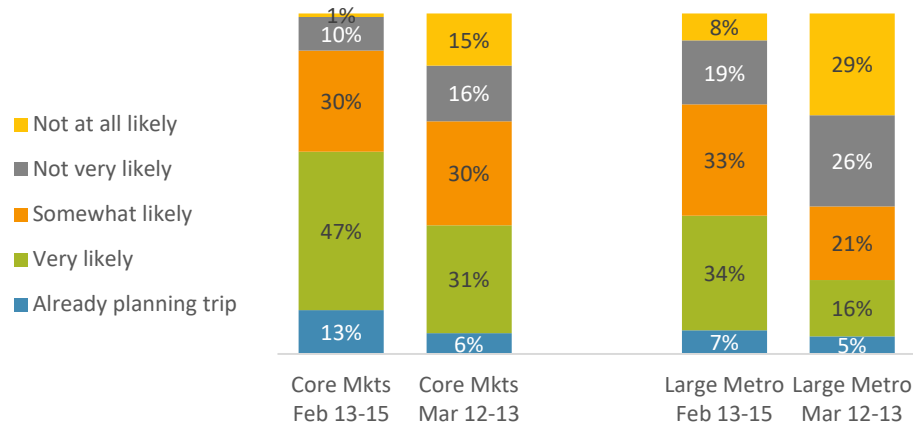
12-month planning window

- In the different markets, likelihood to visit varies from 41% to 67%. Using data that was collected for the seasonal study in mid-February shows that where a comparison is available, interest has dropped significantly.

How likely are you to visit Asheville in the next 12 months?



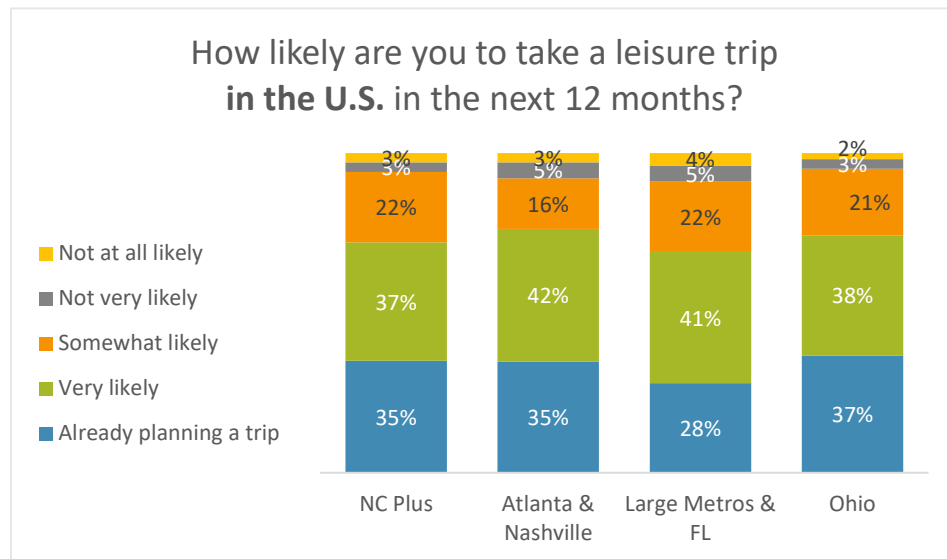
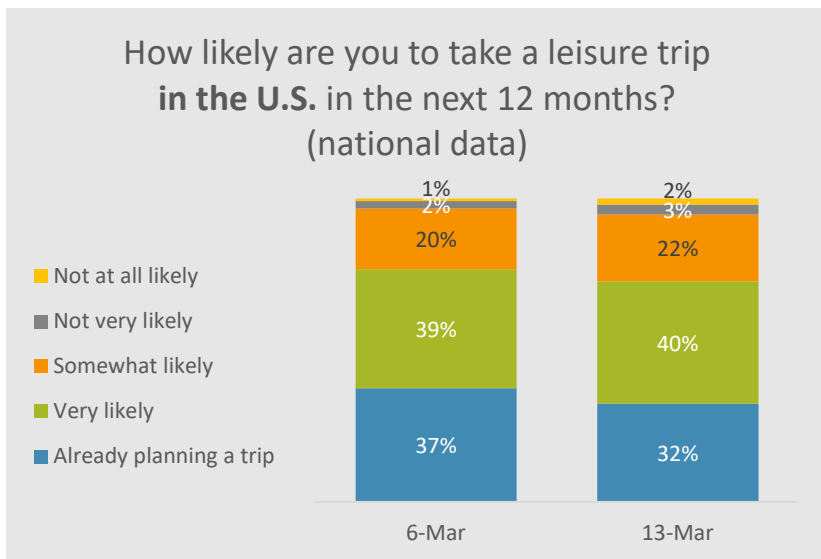
How likely are you to visit Asheville in the next 12 months?



February data was collected as part of the Seasonal Research project. While markets were different, comparisons in Core and Large metro are possible

12-month planning window: U.S.

- In terms of travel expectations for the coming year, there is still strong optimism about travel, with more than 90% indicating they are likely to take a domestic leisure trip in the next year.

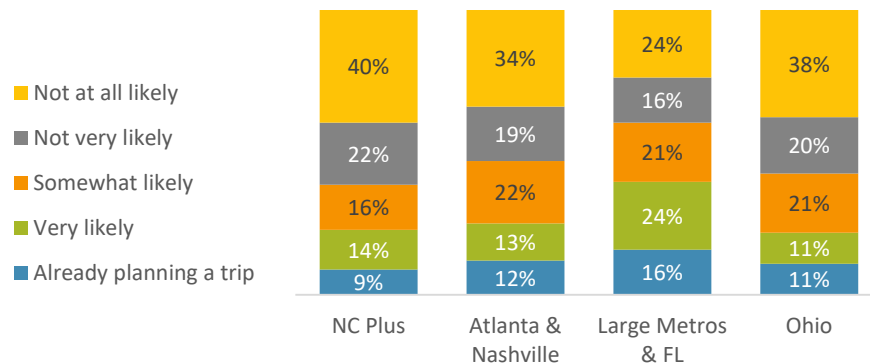


12-month planning window: International

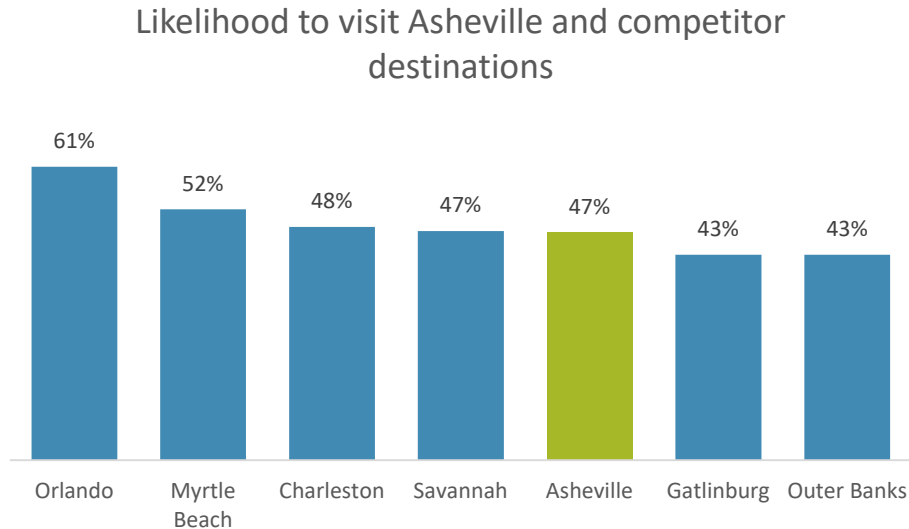
- The data for international trips among Asheville's target markets is slightly lower than national data, with about 40% indicating they will travel internationally. The percentage is higher in the large metro areas.



How likely are you to travel internationally in the next 12 months?



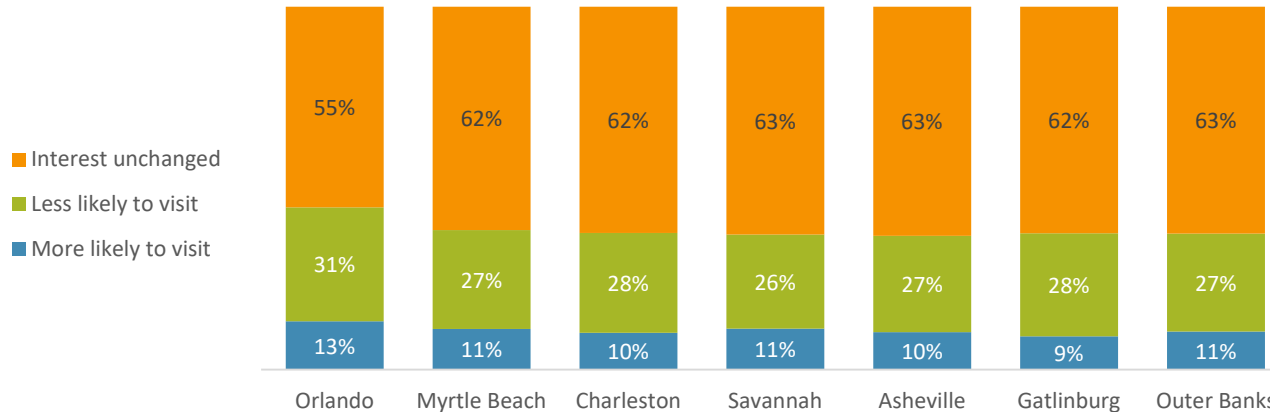
12-month planning window with competitor destinations – Asheville data



Asheville data – Impact on interest in visiting

- While consumers do indicate that they are less likely to visit Asheville since the start of the coronavirus, the competitive findings indicate that this is not limited to Asheville.

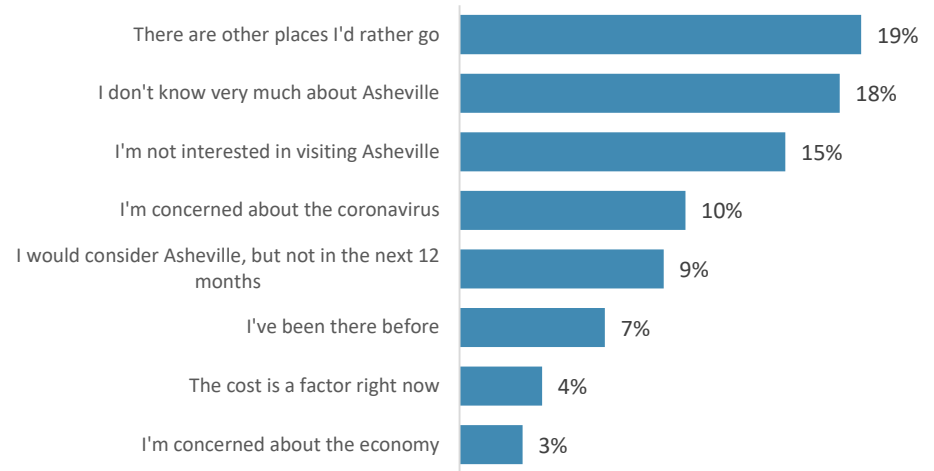
Has interest in visiting changed since start of coronavirus?



Reasons Unlikely to Visit

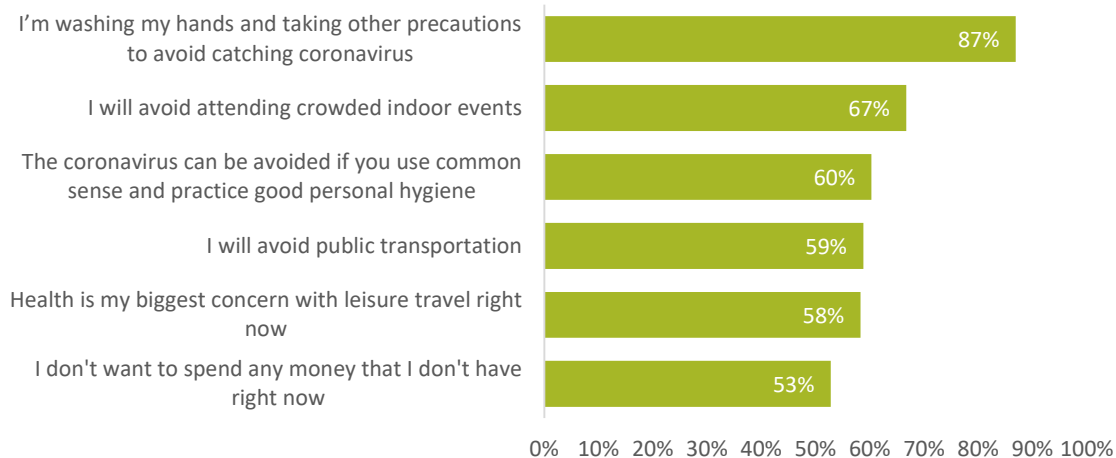
- While 10% of the consumers indicate that they are unlikely to visit Asheville due to the coronavirus, it is not the main factor.
- Generally, competitive pressures and unfamiliarity are currently more important than the coronavirus.

Why are you unlikely to visit Asheville in the next 6 months?



In Asheville's markets, two-thirds will avoid crowded indoor events. Health and money are concerns for more than half of the respondents.

Higher agreement with sentiment statements

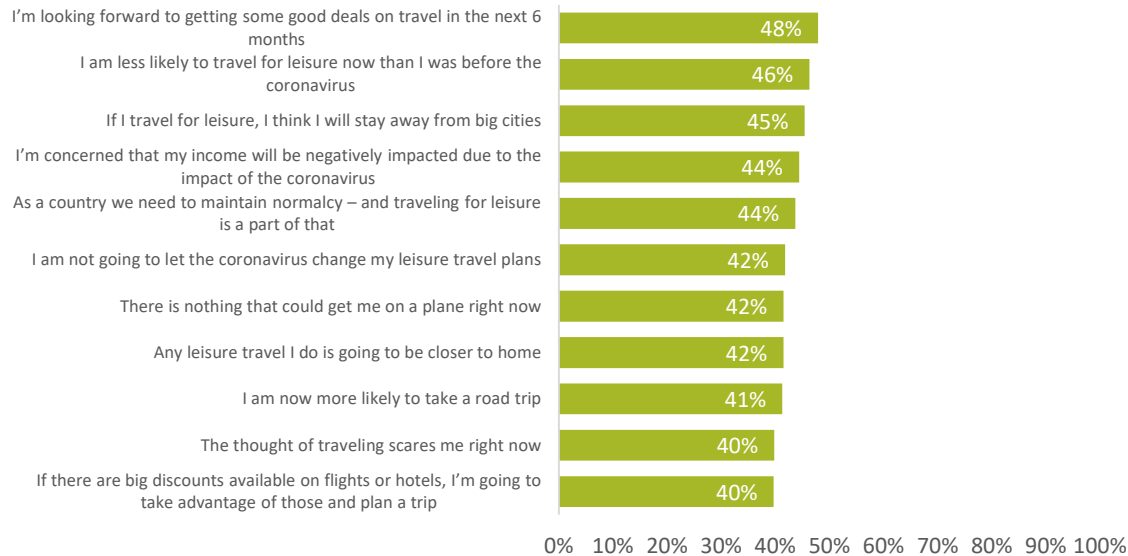


How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

National findings for these statements are in the appendix

In Asheville's markets, there are many who are less likely to travel, but also people looking for deals in the next few months.

Mid-range agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

National findings for these statements are in the appendix

There is quite a bit of fear. Few people feel strongly that it is safe to travel right now, or that the risk of catching coronavirus is low.

Lower agreement with sentiment statements

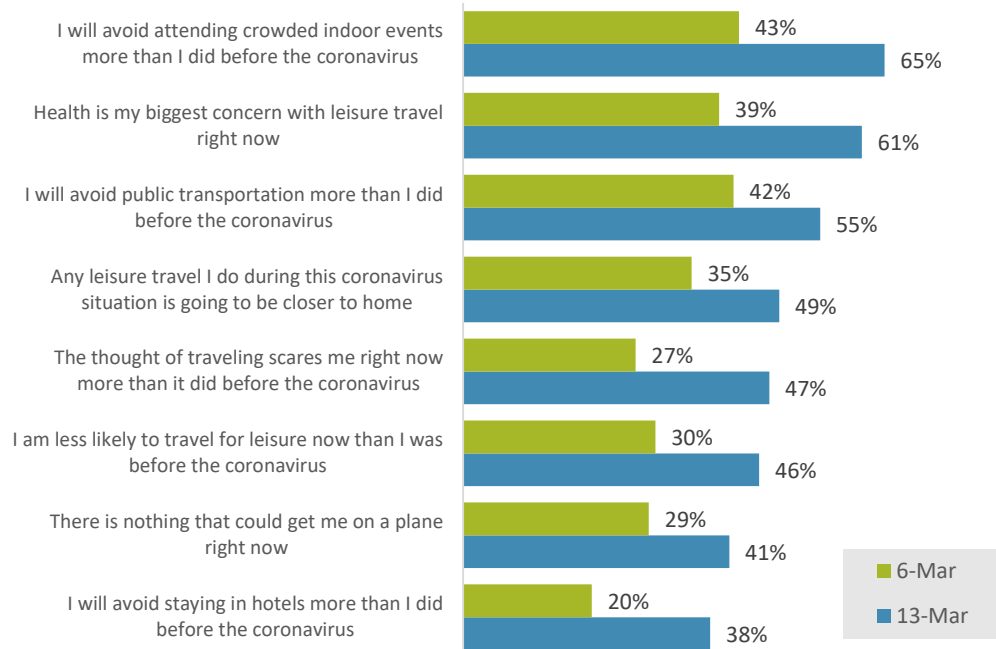


How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

National findings for these statements are in the appendix

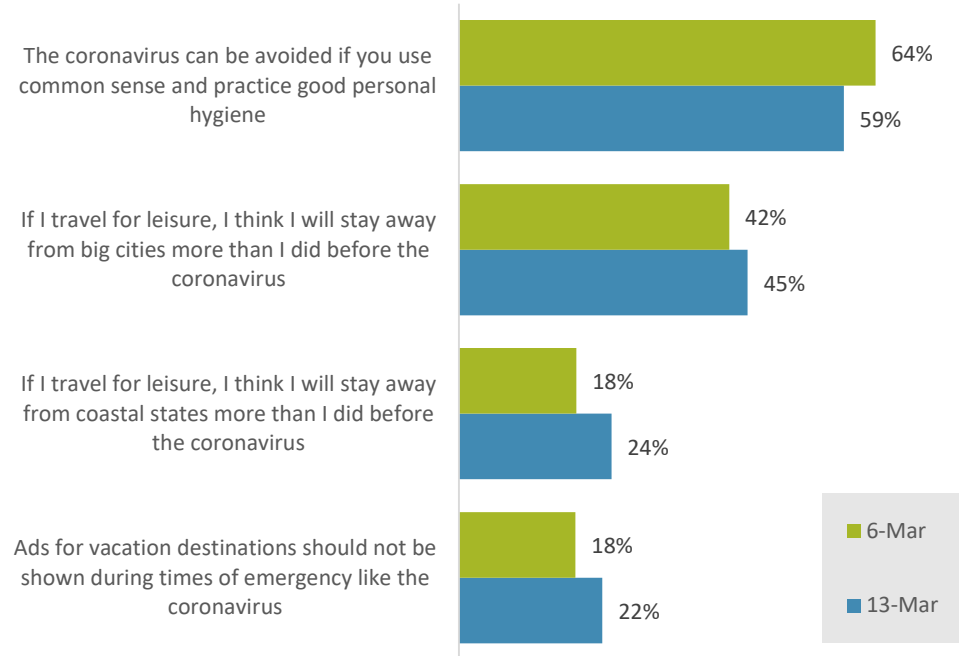
Nationally, travelers are now more cautious than a week ago about crowded indoor events, public transportation, long-haul travel and hotels.

Higher agreement this week than last



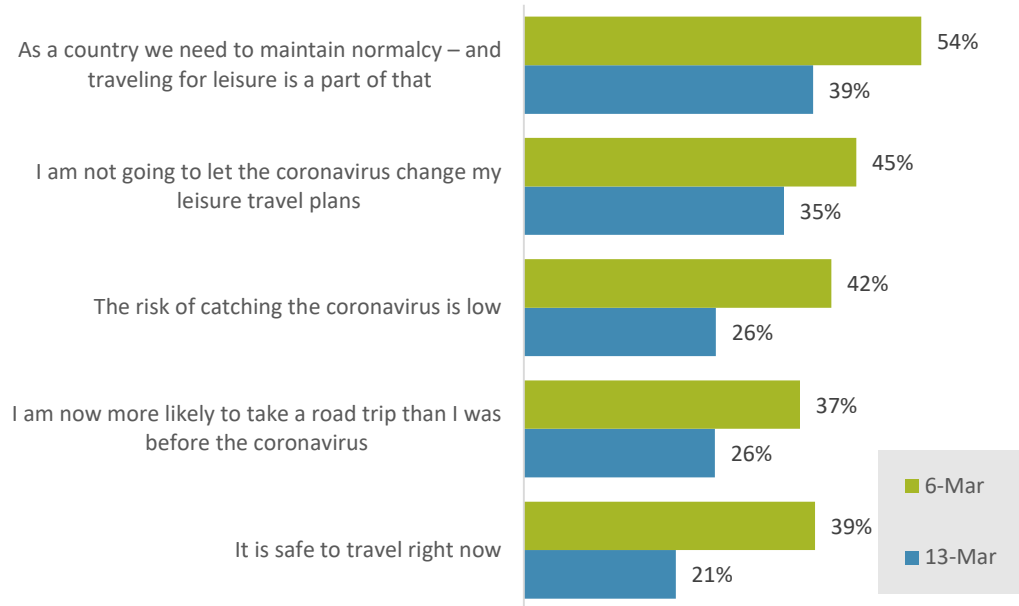
Nationally, attitudes have not changed much toward a common-sense approach to the virus, cities and coastal areas as travel destinations, and leisure advertising.

Similar agreement this week to last



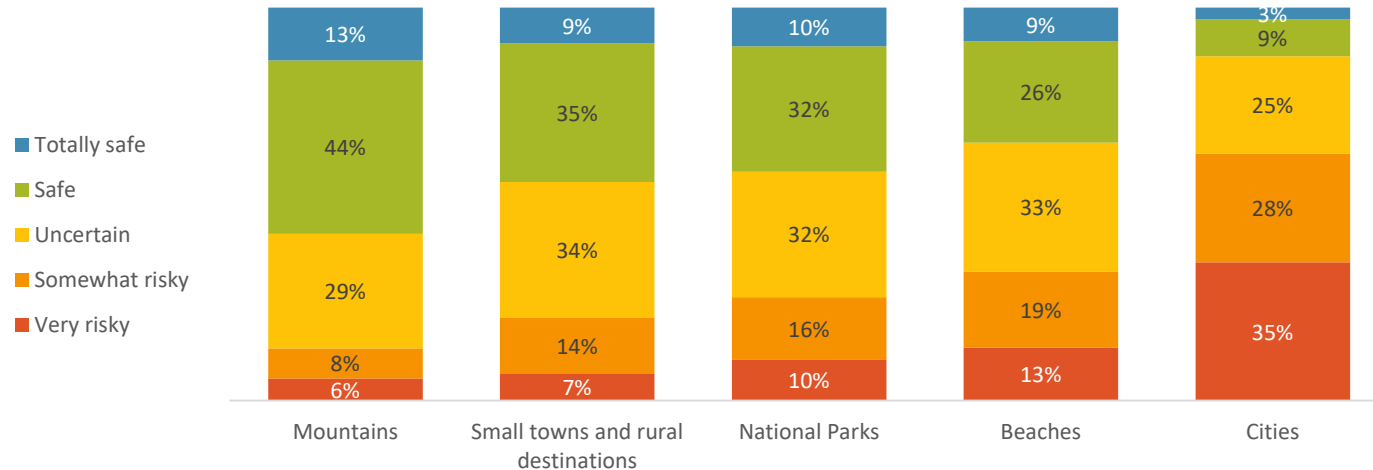
Nationally, travelers are more cautious now than a week ago about the virus itself and about travel.

Lower agreement this week than last



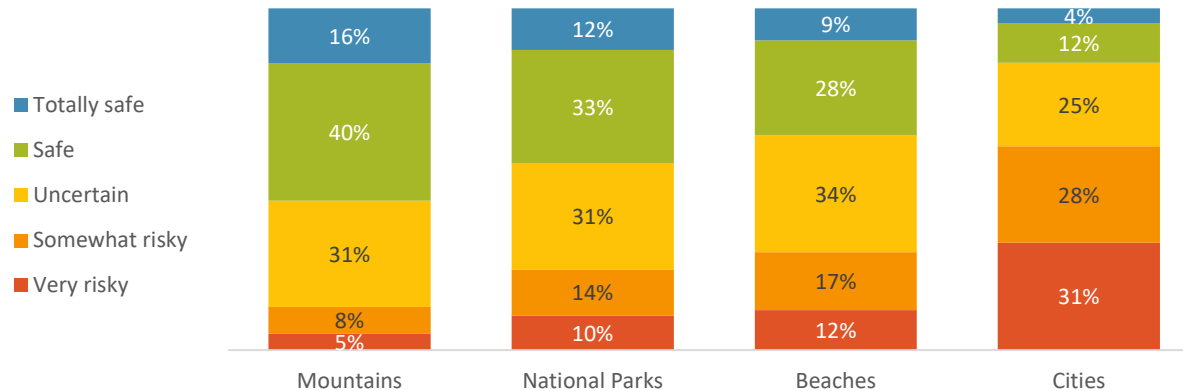
Nationally, travelers view cities as risky places to visit right now; outdoor and small/rural destinations seem safer.

How safe do each of these types of destinations feel to you given the coronavirus?



The results are similar among Asheville's target – with more than half feeling that mountains are safe.

How safe do each of these types of destinations feel to you given the coronavirus?



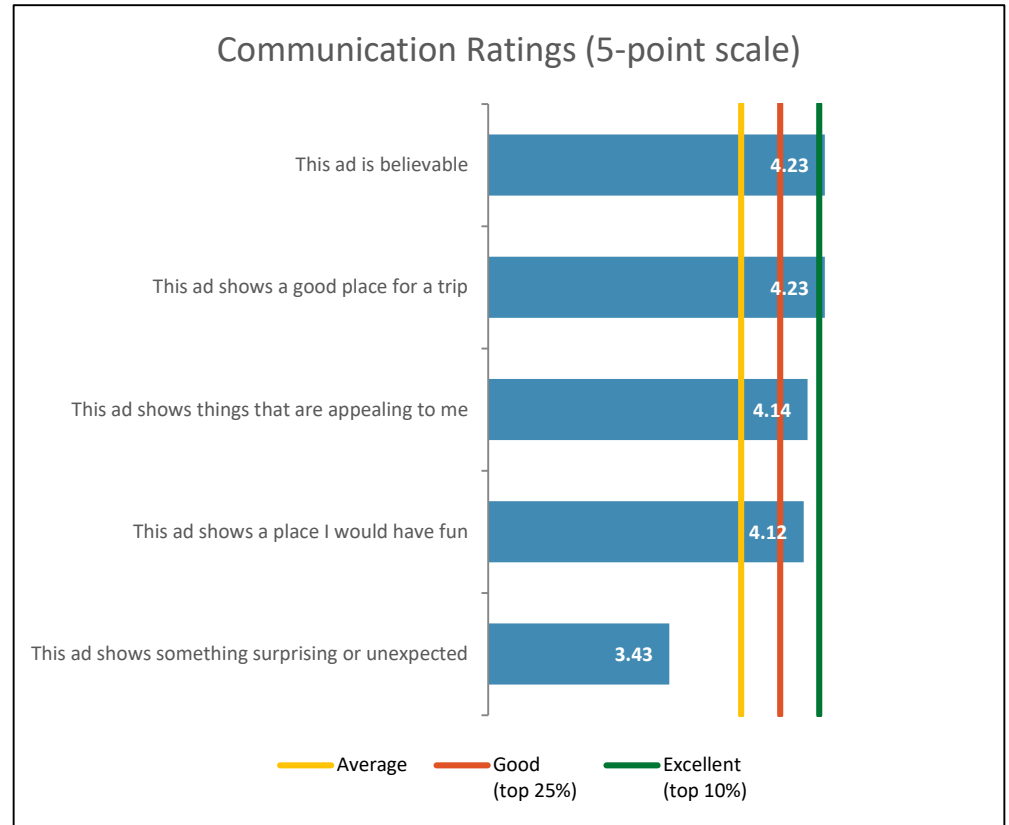
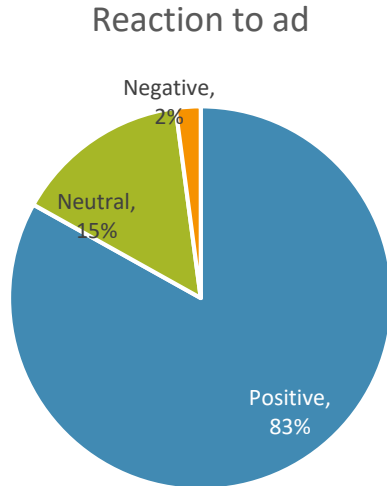
Right now, travelers prefer more solitary leisure trip activities and remote locales that limit interaction with others.

Keeping coronavirus in mind, which of these activities or experiences are you more likely to participate in on a vacation?	National	Asheville/Total
Taking a drive with scenic views	52%	48%
Going on a hike	40%	35%
Relaxing in a cabin or vacation rental	34%	39%
Participating in outdoor activities	27%	29%
Indulging in local cuisine and restaurants	19%	19%
Shopping at local, independent stores and boutiques	16%	14%
Visiting museums or attractions	10%	12%
Staying in a hotel in a city center	9%	8%
Going to a brewery or out for cocktails	8%	9%
Exploring a vibrant downtown area	7%	8%
Attending theater or concerts at small venues	6%	6%
Going to a spa	6%	7%
Participating in an outdoor festival	6%	6%
Taking a sightseeing tour on a bus or trolley	5%	5%
Participating in an immersive activity with other people where you have a new experience or learn something different	4%	5%
Going to art galleries or studios	3%	5%

Respondents could choose up to three activities.

Asheville ad

- Reactions to the Asheville ad are very positive, and the ratings put this ad among the best SMARInsights has tested.

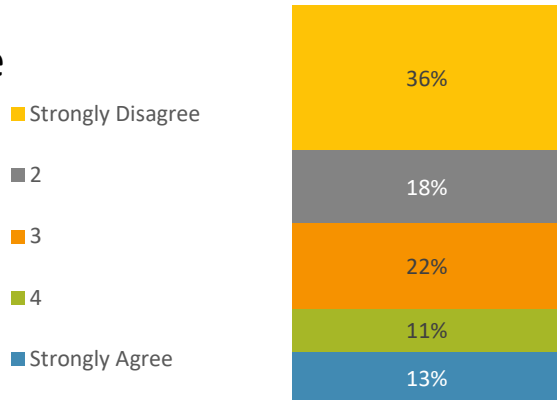


Older travelers are less concerned about leisure travel advertising right now than younger travelers are.

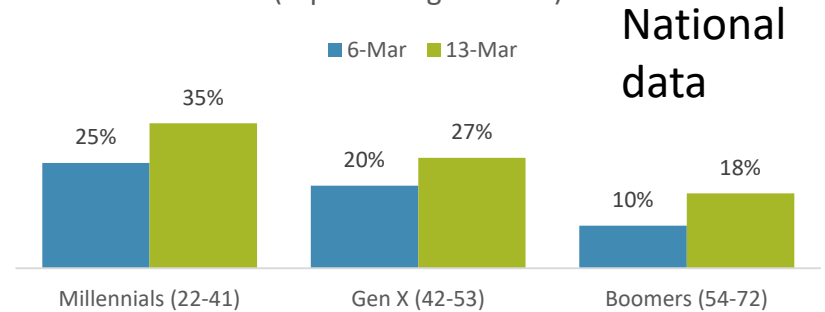
- In general, Gen X and Boomer travelers do not have a problem with leisure destination advertising during the current pandemic. This may be due to future planning and thinking about places to go after the crisis has passed, while younger travelers are more consumed by the moment.

Ads like this should not be shown during times of emergency like the coronavirus

Asheville data



Ads for vacation destinations should not be shown during times of emergency like the coronavirus (top 2 box agreement)



National data

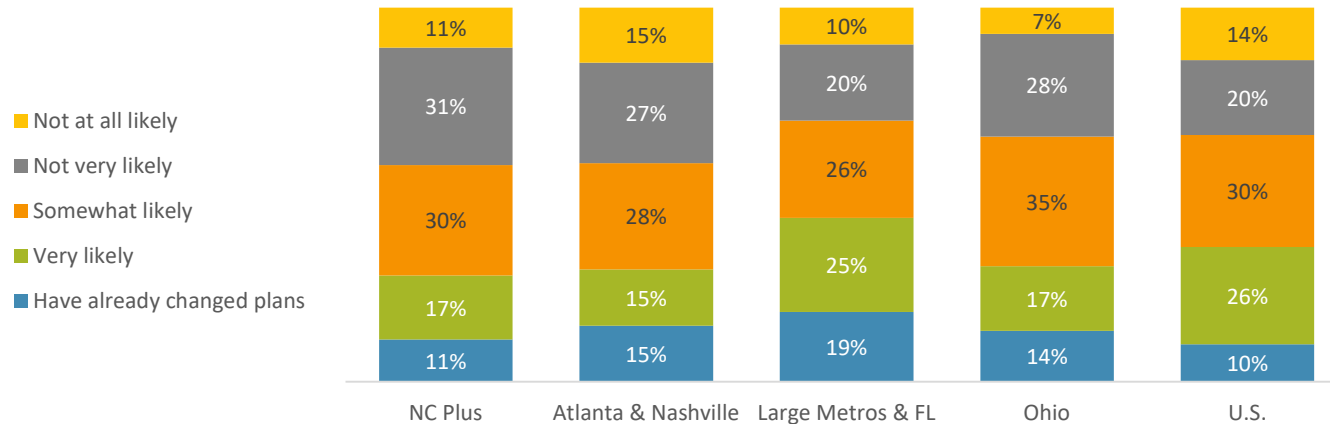
Domestic leisure traveler sentiment in light of coronavirus/COVID-19

MARKET-SPECIFIC FINDINGS

Traveler sentiment snapshot – March 13

- The impact of coronavirus in Asheville’s target markets is similar to the national findings.
- The impact of the coronavirus is more pronounced in larger cities, and least evident in the nearby North Carolina markets.

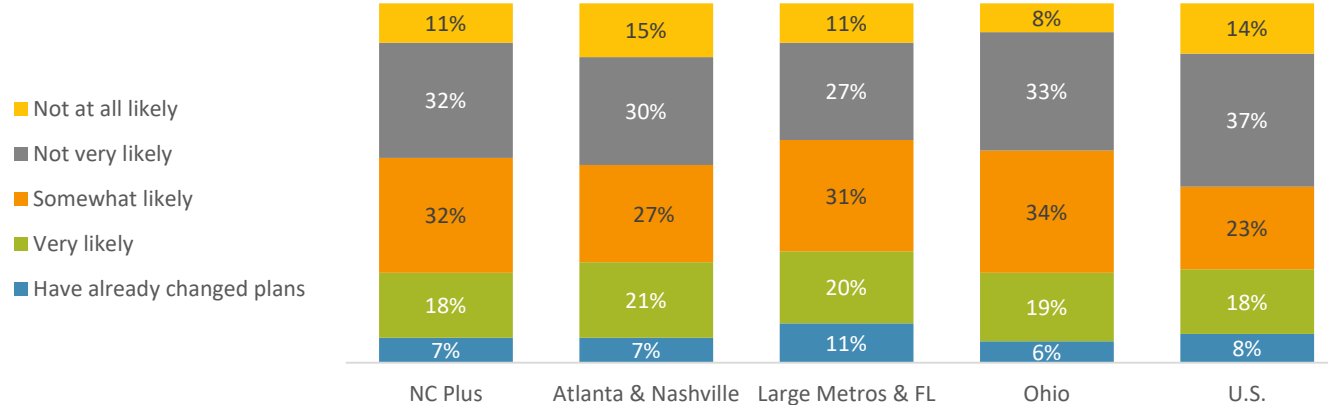
How likely is the coronavirus to change your leisure travel plans?



Traveler sentiment snapshot – March 13

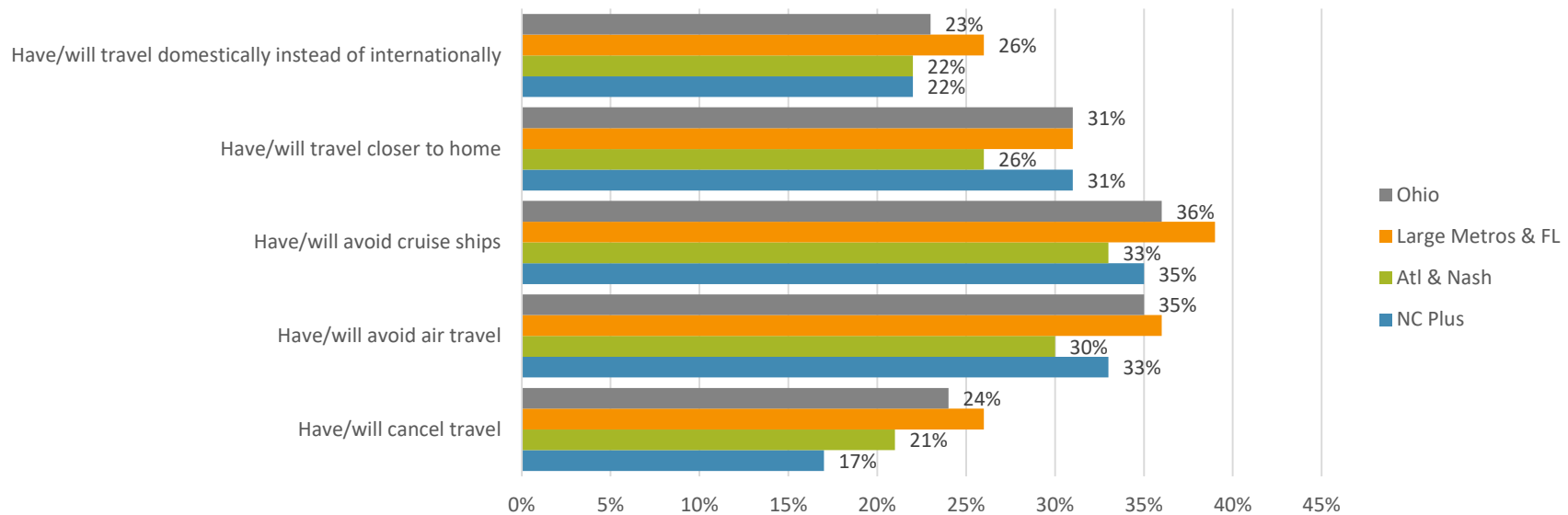
- Currently, the economy is having less impact than the virus, with only 8% indicating that they have already changed plans due to the economy.
- Again, the impact is more evident in the large metropolitan areas.

How likely is the economy to change your leisure travel plans?



Travelers are most likely to avoid cruise ships and air travel. They are more likely to travel closer to home. Again, the negative impact is stronger in the large metro areas.

How has/will the coronavirus influence your leisure travel plans? (% of total)



Right now, travelers prefer more solitary leisure trip activities and remote locales that limit interaction with others.

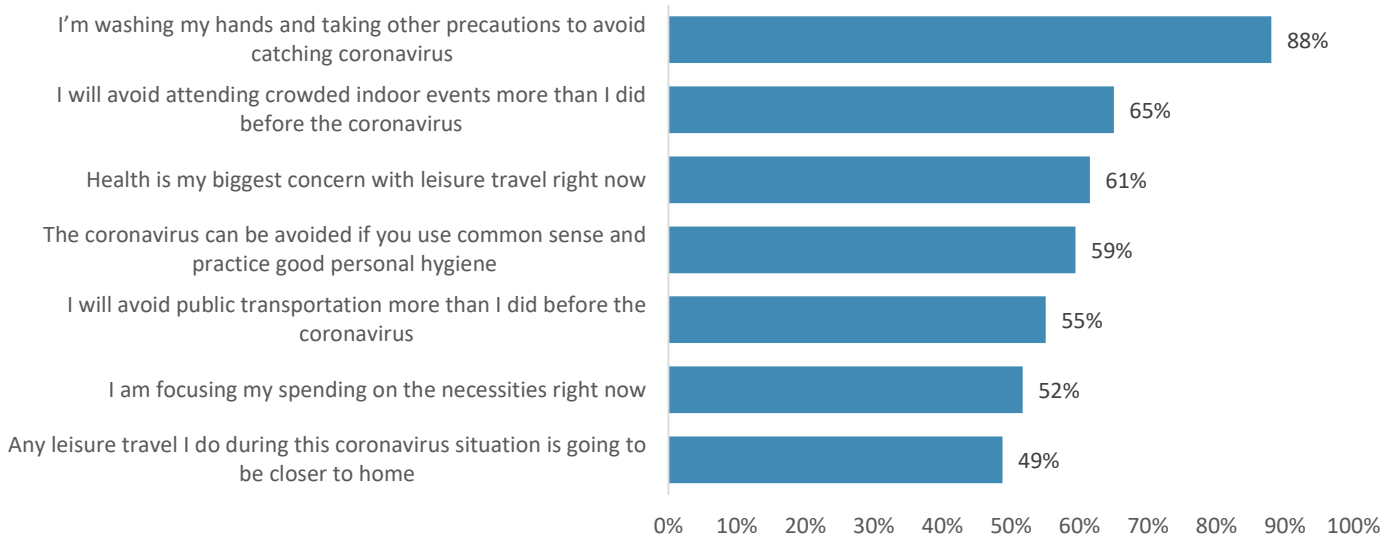
Keeping coronavirus in mind, which of these activities or experiences are you more likely to participate in on a vacation?	National	Asheville/Total	NC Plus	Atl & Nash	Large Metros & FL	Ohio
Taking a drive with scenic views	52%	48%	58%	50%	45%	52%
Going on a hike	40%	35%	41%	41%	30%	47%
Relaxing in a cabin or vacation rental	34%	39%	44%	49%	34%	46%
Participating in outdoor activities	27%	29%	27%	28%	28%	34%
Indulging in local cuisine and restaurants	19%	19%	20%	17%	20%	13%
Shopping at local, independent stores and boutiques	16%	14%	13%	10%	15%	12%
Visiting museums or attractions	10%	12%	9%	10%	13%	9%
Staying in a hotel in a city center	9%	8%	8%	7%	8%	7%
Going to a brewery or out for cocktails	8%	9%	8%	10%	9%	7%
Exploring a vibrant downtown area	7%	8%	7%	6%	9%	5%
Attending theater or concerts at small venues	6%	6%	5%	6%	6%	3%
Going to a spa	6%	7%	5%	6%	8%	4%
Participating in an outdoor festival	6%	6%	7%	6%	7%	5%
Taking a sightseeing tour on a bus or trolley	5%	5%	3%	4%	6%	4%
Participating in an immersive activity with other people where you have a new experience or learn something different	4%	5%	3%	2%	6%	3%
Going to art galleries or studios	3%	5%	4%	4%	6%	4%

Respondents could choose up to three activities.

APPENDIX

Nationally, about half of travelers will stay closer to home for leisure travel and nearly two-thirds will avoid crowded indoor events.

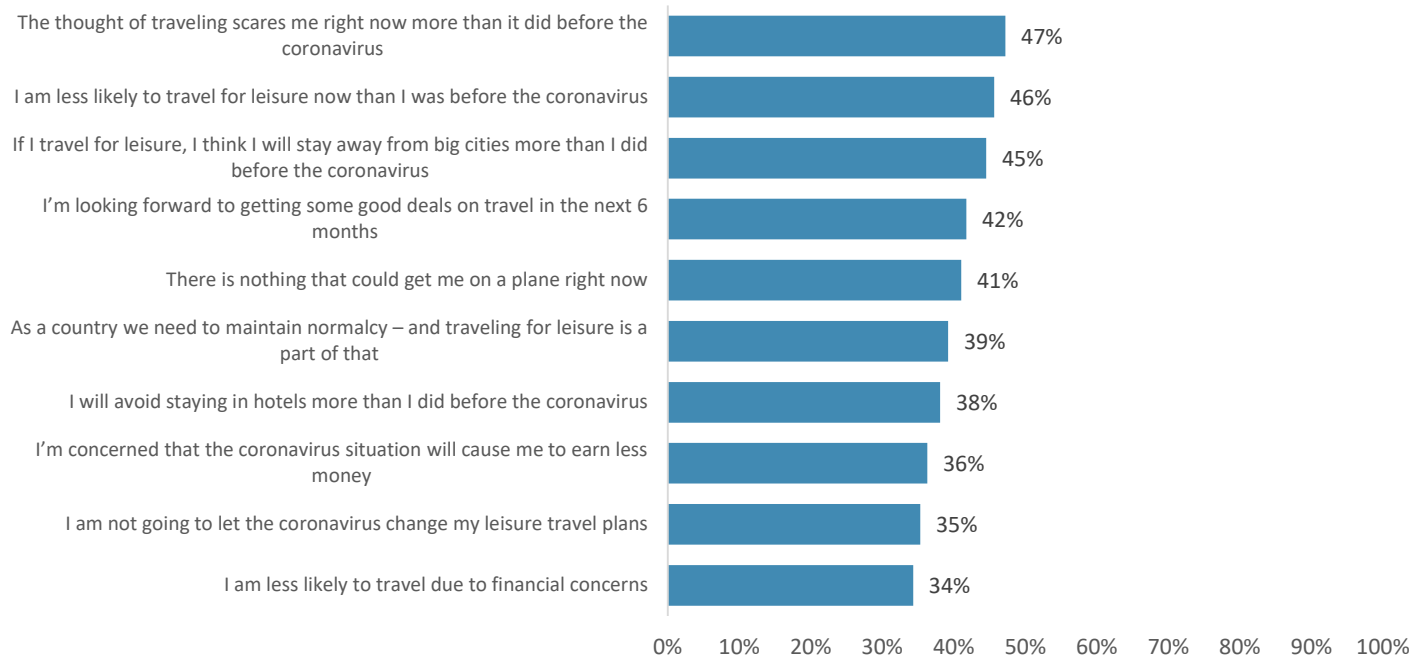
Higher agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

Nationally, while travel is scary for some right now, nearly as many view this as an opportunity for travel deals.

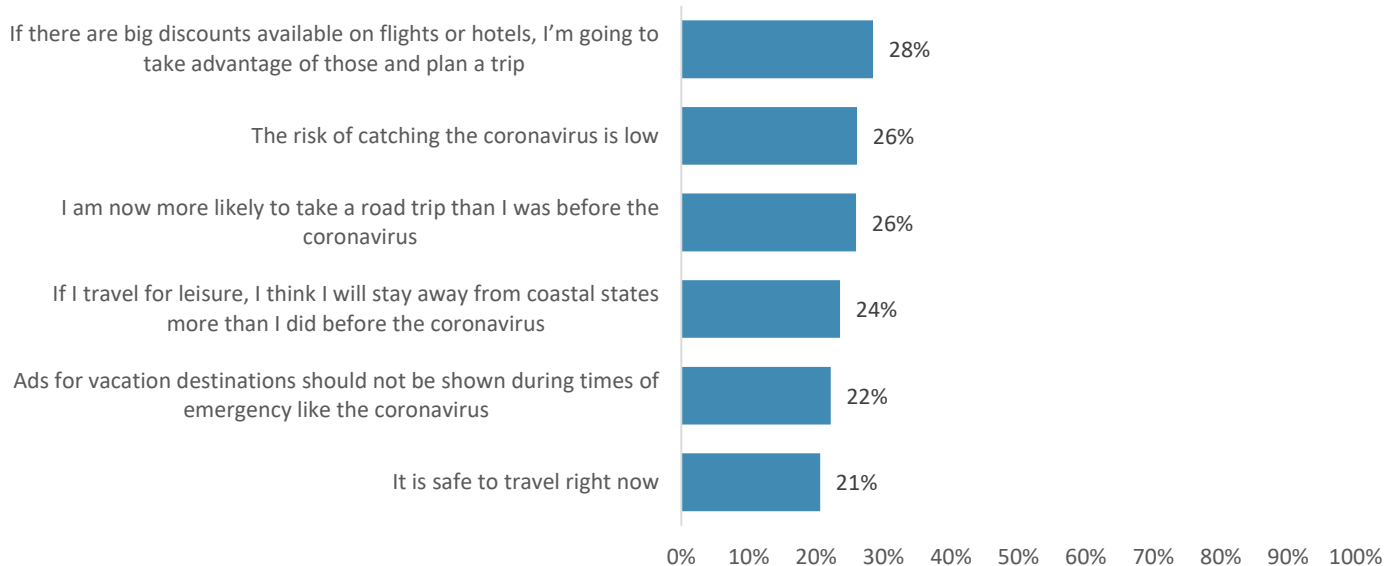
Mid-range agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.

Nationally, fewer than a third of consumers are actively looking for travel discounts, but views toward travel are shifting.

Lower agreement with sentiment statements



How much do you agree with the following statements? 1=strongly disagree; 5=strongly agree. Shown are % answered 4 and 5.