

Tourism Coffee Hour

July 22, 2020
Will Cronin
MSU Extension



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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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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
- 10:25: Collaborative Public Health Posters
 - Amy Nosal, Iron County UW Extension
- 10:35: Discussion
- 11:00: Adjourn



Introductions!



MICHIGAN

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Heart+Mind PulseSM

*Expectations, Emotions,
and Segments:*

*The Effect of Rising COVID-19
Cases on Consumer Confidence*

Contact

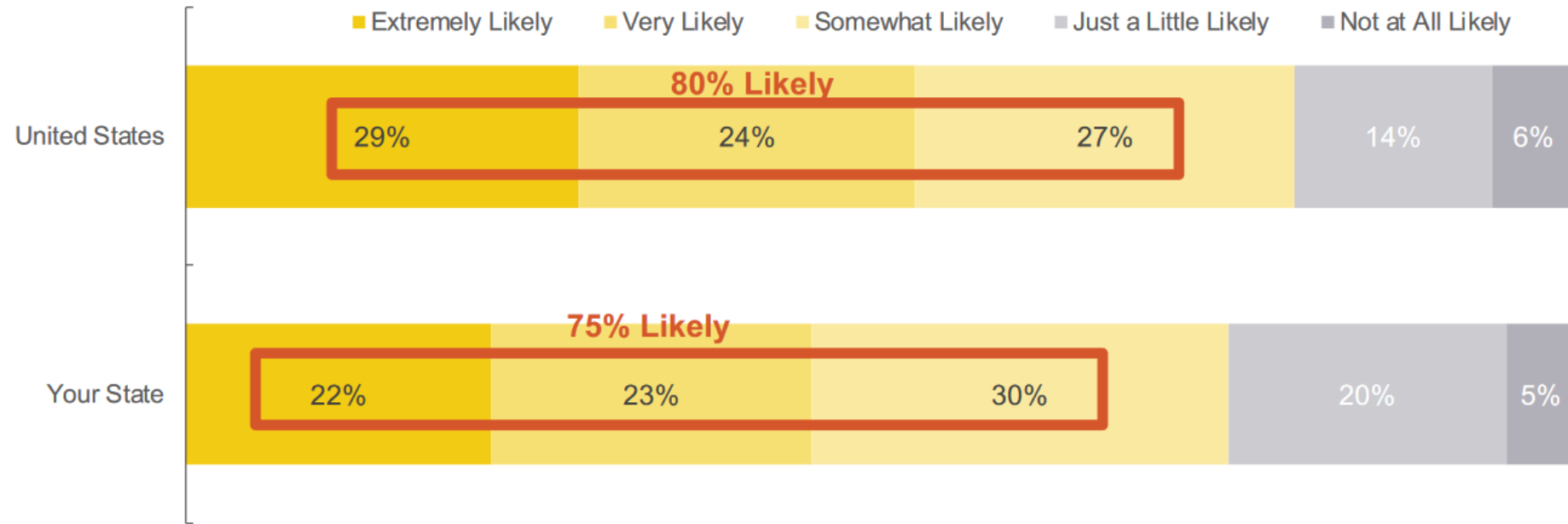
- Mike Dabadie, CEO and Managing Partner
- +1 202 870 1234
- mdabadie@heartandmindstrategies.com
- Other reports from our tracking can be found on our CV-19 website
 - <http://heartandmindstrategies.com/covid-19/>



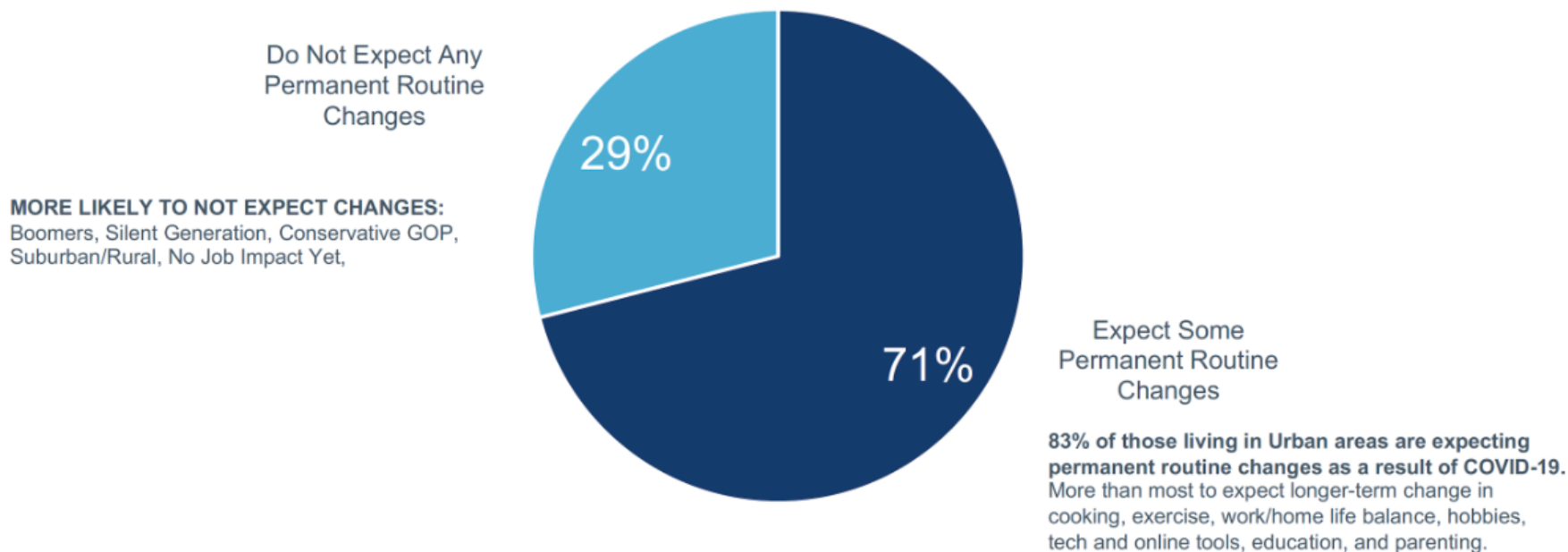
Three Quarters Expect a Second Shelter-in-Place Order

Q: How likely do you think it is that the United States will see a second wave of coronavirus cases in the fall that shuts down the economy again and leads to new stay-at-home and shelter-in-place orders?

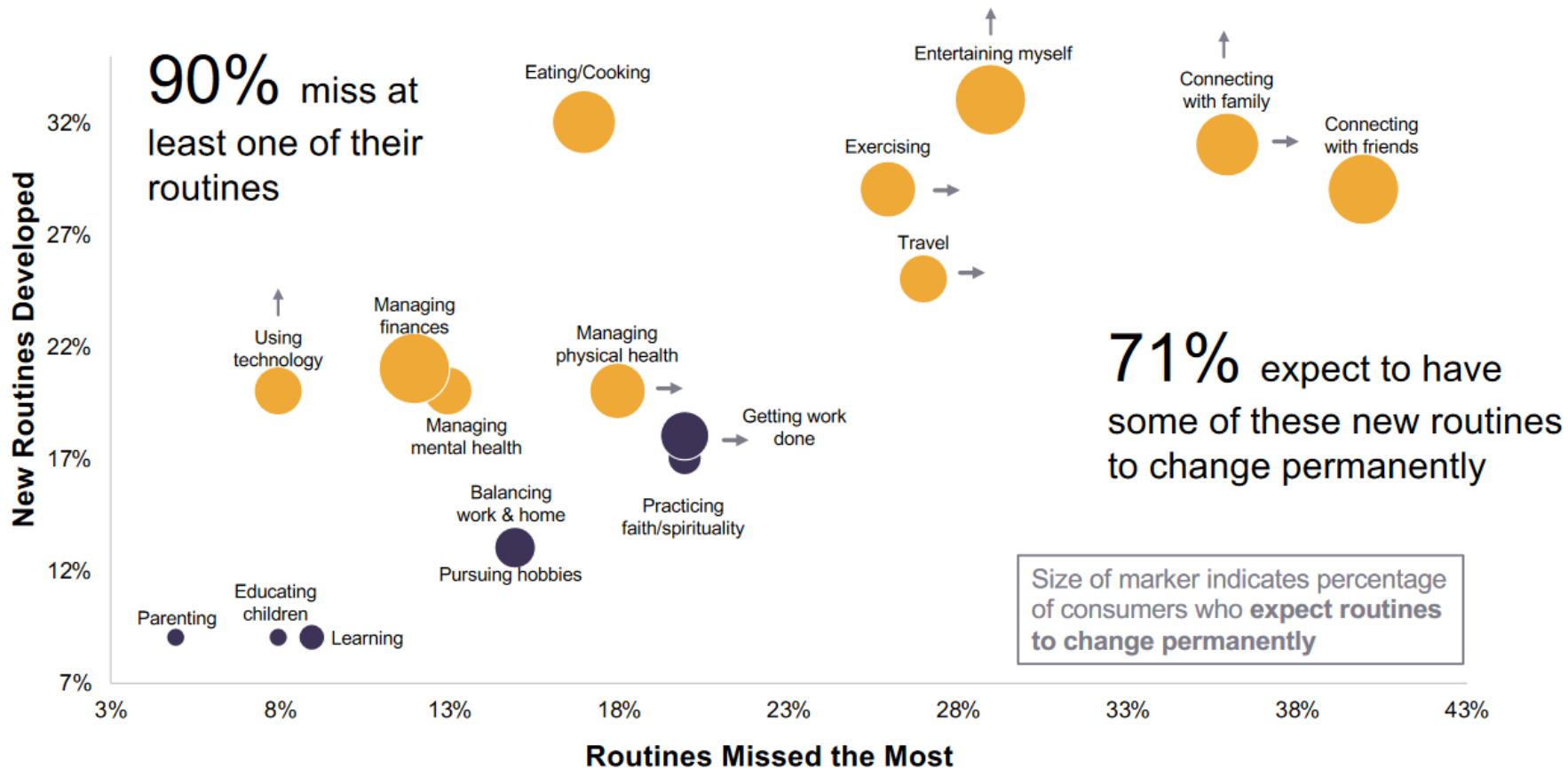
Q: How likely do you think it is that your state will see a spike in coronavirus cases that leads to a second shelter-in-place or stay-at-home order?



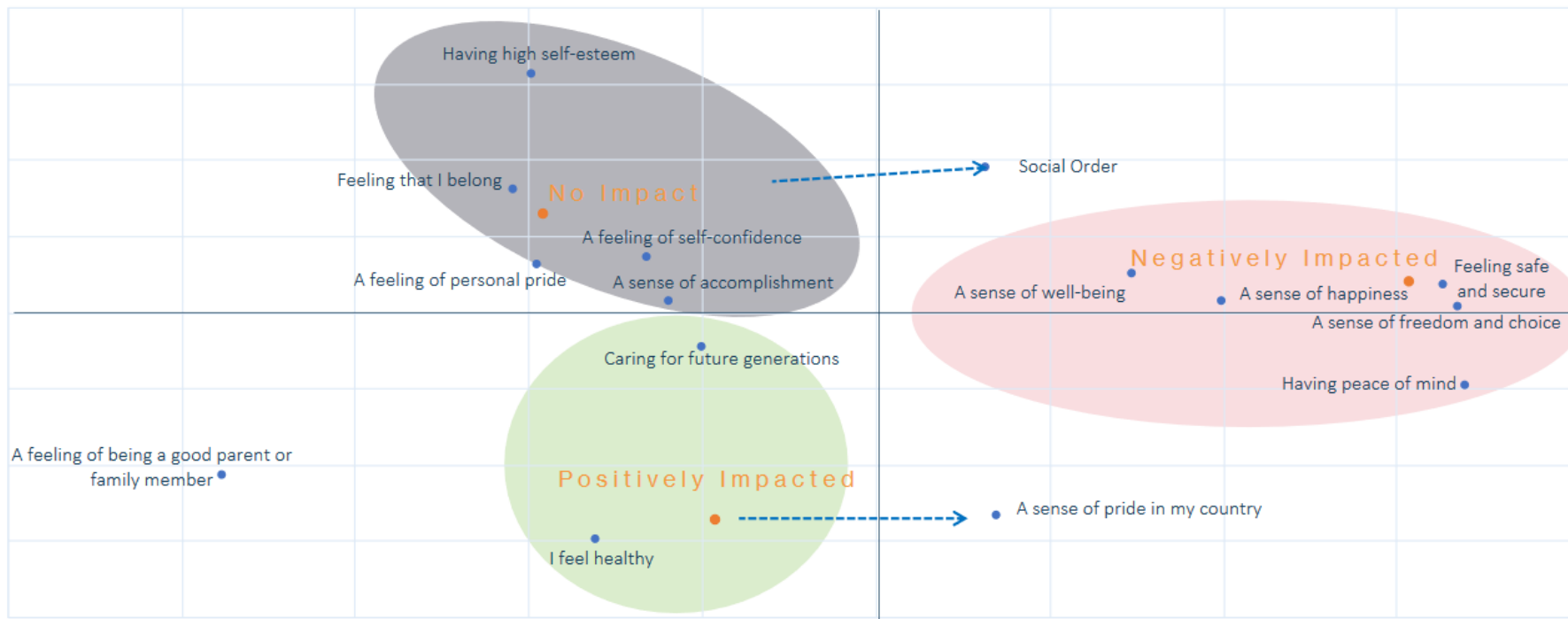
Behavioral Changes to Life are Expected to Be Permanent



New Routines Forming That Could Last Longer



Human Needs and Values are Being Compromised: Safety, Freedom, Peace of Mind Taken Away



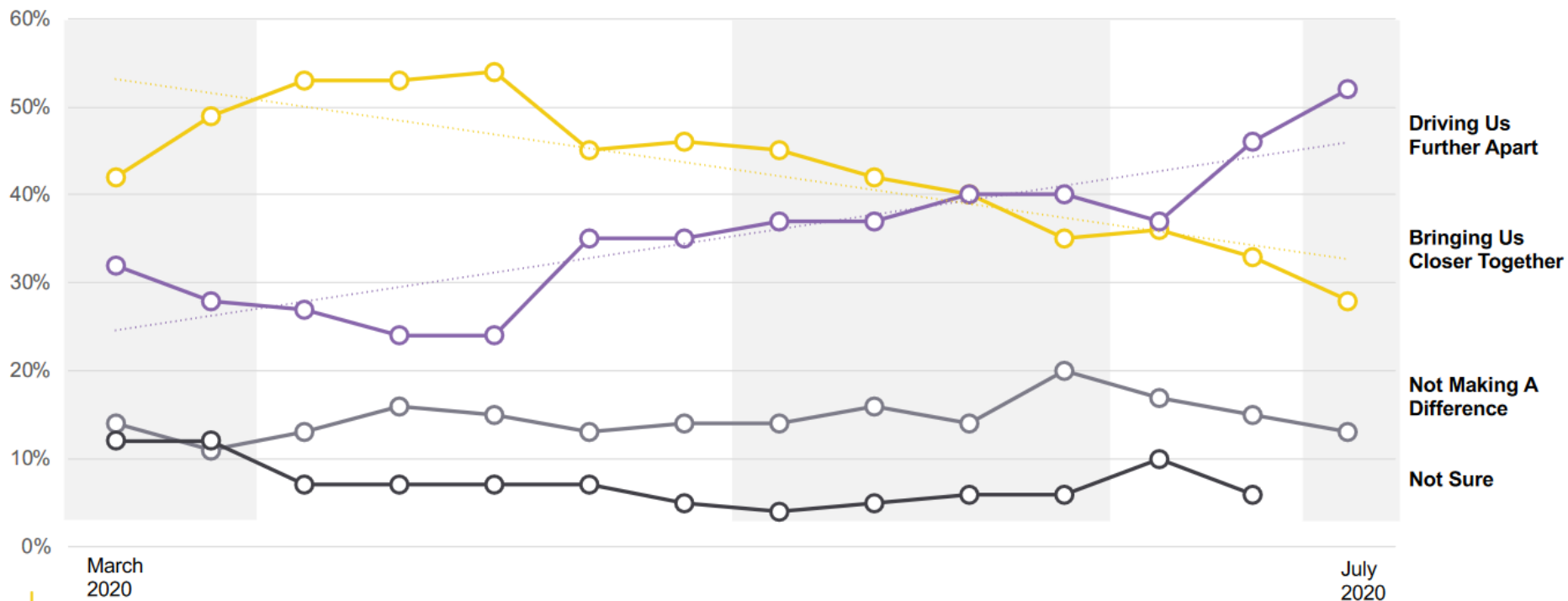
Please indicate the extent to which the coronavirus pandemic is currently impacting each of these.

Source: Crosby Textor May to June 2020



Division Is Widening As Controversy Reigns

Q: Overall, would you say the outbreak of the coronavirus is bringing our communities and the people in our country closer together and making us more unified, or is it driving us further apart and making us more divided?

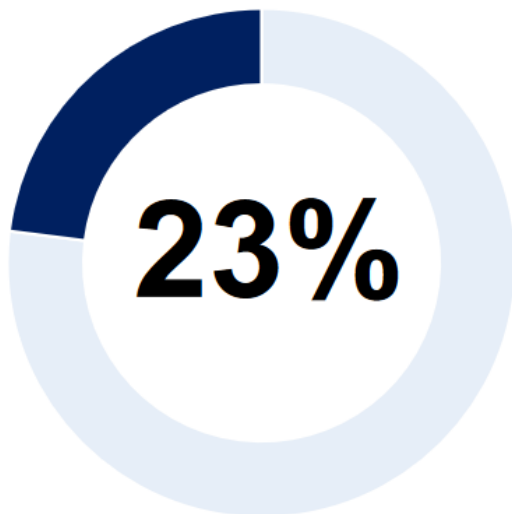


Pg. 15 Source: Heart+Mind Strategies CV-19 Tracking



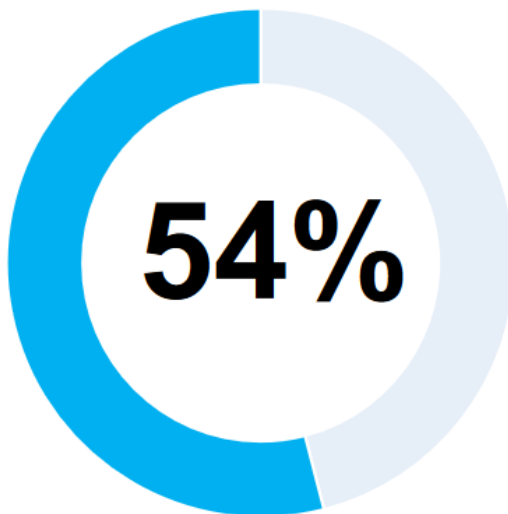
New Consumer Segments Stable Over 15 Weeks

Hopeful Optimists



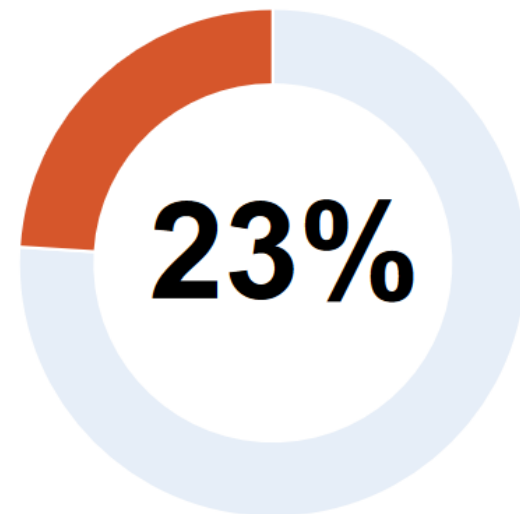
- 64% Male
- 60% Reopen now
- 50% Kids at home
- +12 Trump over Biden
- Young Millennial, Silent
- Strong positive emotions
- Travel: Risk Takers, Faint Signals

Concerned Realists



- 50% Male/Female
- 50% Reopen now/Stay closed
- Skew Multicultural
- +1 Biden over Trump
- Gen Z, Gen X
- Balance of emotions
- Travel: Cautiously Curious; Moderate Signals

Anxious Worriers



- 80% White
- 69% Female
- 67% Stay closed
- 23% Unemployed
- +22 Biden over Trump
- Older Millennial
- Strong negative emotions
- Travel: Wait and See; Needs Full Permission



What Employees Expect at Work

Health and Safety Practices	Must Have	Nice to Have	My Responsibility
Require wearing face masks	●		●
Require social distancing	●		●
Flexibility to work remotely		●	
Provide temperature checks		●	●
Frequent sanitizing – especially common areas	●		●
Regular handwashing			●
Sanitizing stations/Hand sanitizer/Wipes	●		●
Provide PPE	●		
Provide safety/CDC guidelines	●		
Encourage sick days/quarantine		●	●
Plexiglass barriers between desks/customers	●		
Reduce capacity at office/onsite locations	●		
Provide gloves		●	
Offer mental health days		●	
Offer COVID-19 testing		●	
Flexible work schedules		●	

“Separate our cubes so they aren't so close together or add some type of plexiglass barrier. Provide masks and hand sanitizer. Clean and disinfect the area regularly.”

“I am responsible for my health, for making sure my area is clean and sanitized even if the cleaning crew has already done so during after-hours. I'm also responsible for washing and sanitizing my hands on a regular basis. Wearing a mask is my responsibility regardless if my employer requires it or not to keep me and my fellow workers safe.”

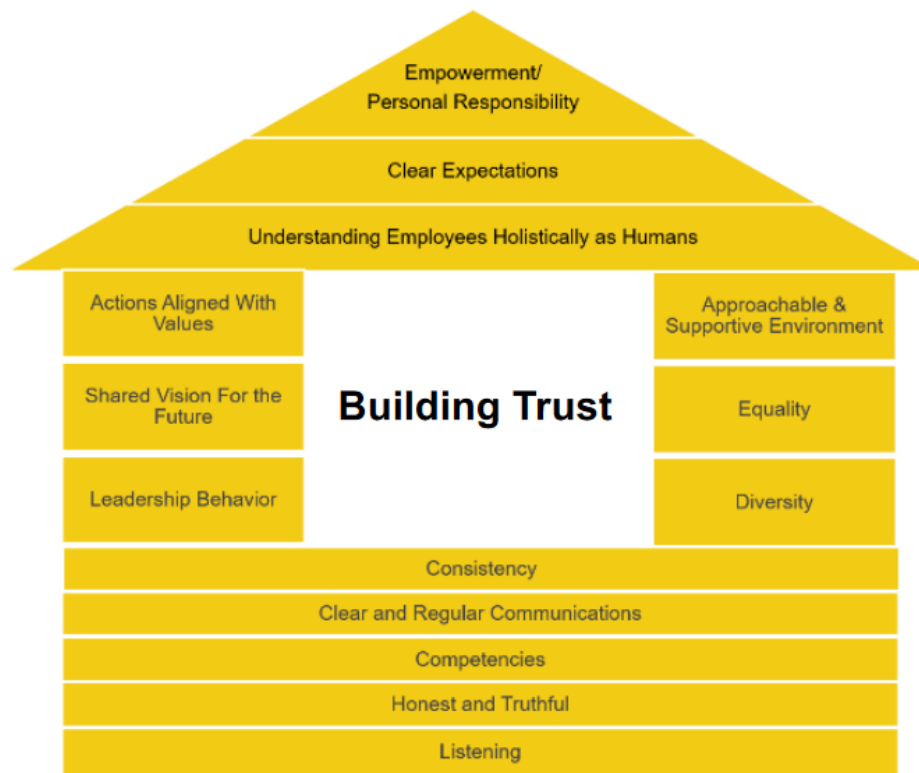
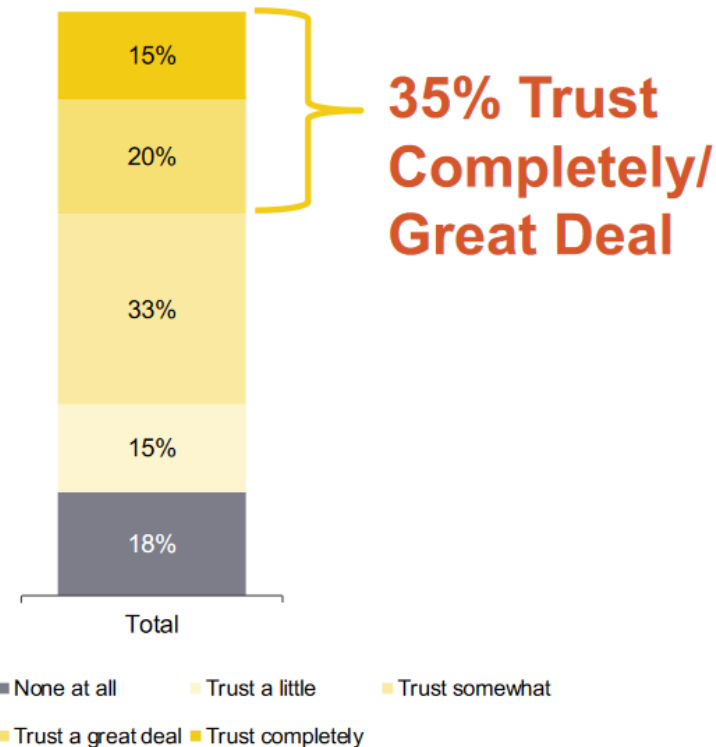
Source: Heart+Mind Strategies. Base: Qualitative Community (n=729)

Q. What are the required or 'must-do' practices you expect your employer to enact in order to protect your mental and emotional health and well-being, and that of your co-workers? / Q. What are the 'nice to have' practices you would like to have your employer to enact in order to protect your mental and emotional health and well-being, and that of your co-workers? / Q. What are your responsibilities – NOT your employer's responsibility - in the workplace in order to protect your physical health and safety?



What Impacts Trust In Employer?

Trust in employer as a source of information



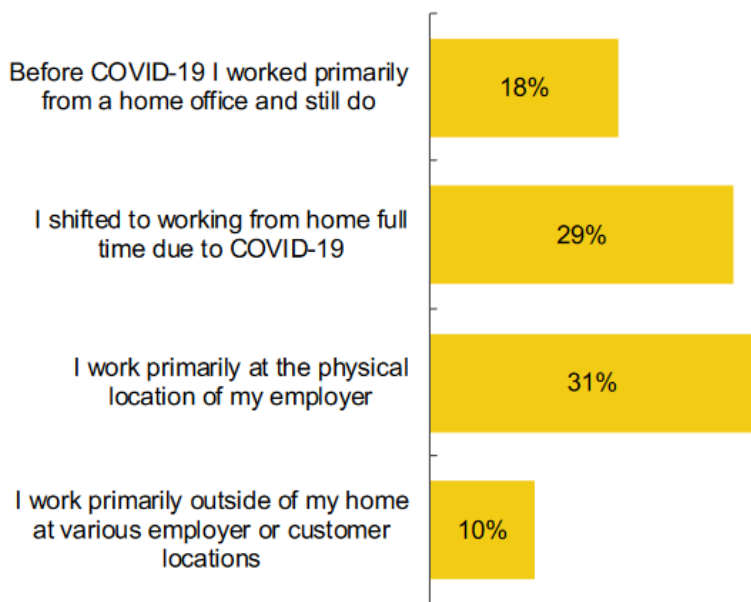
Source: Heart+Mind Strategies. Base: All Qualified Respondents (n=1,009) / Employed (n=571)

Q. How much trust do you have in the following sources of information? / There are many things that may impact trust in your employer. For you, which of the following have the most impact on the degree of trust you have in your employer? Please rank your top 3 choices.



Where Employees Are Working

Work environment



47% Working From Home

Work From Home more likely among College Graduates, 100k+ Income, Gen X, Males 35-54

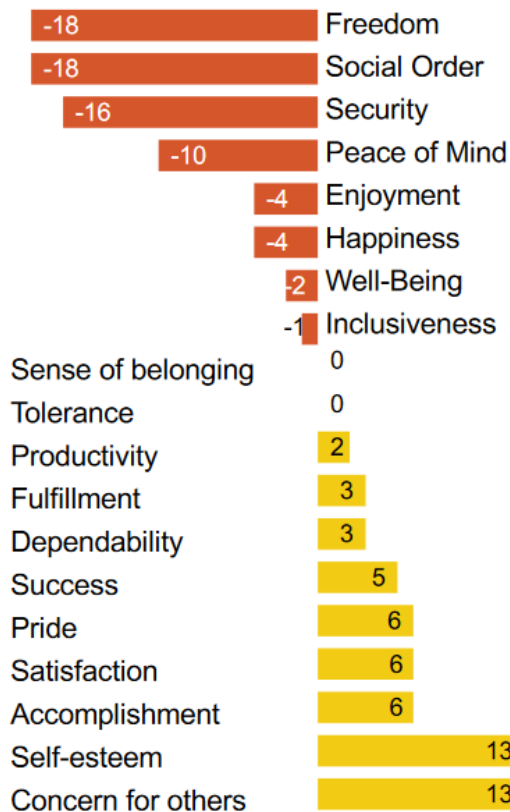
Source: Heart+Mind Strategies. Data base: Employed or Looking (n=662)

Q. Which of the following best describes your work environment? / In your current line of work, how often do you work in a traditional office setting, including your offices of your employer, clients or vendors?



How Employee Values Are Shifting

Getting Worse



Employee sense of Accomplishment, Self-Esteem, Pride stronger than public at large.

Less intensity of loss of Freedom, Peace of Mind, and Security.

Getting Better

Source: Heart+Mind Strategies. Base: Employed (n=571)

Q. Please select the words below that best describe the way you feel right now in light of current events.



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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 17 data (fielded July 3-5) 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**

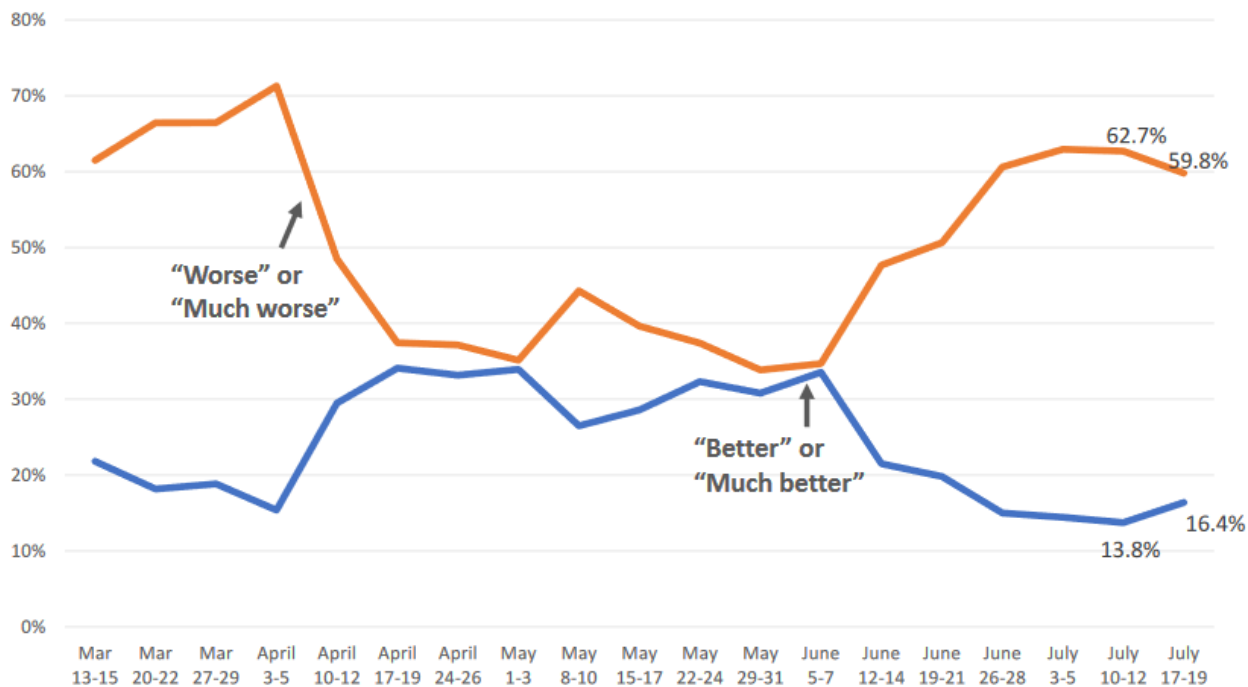


Expectations for the Coronavirus Outbreak

American travelers' morale about COVID-19 improved marginally this week: health and financial concern levels lowered very slightly and 16.4% of travelers expect things to get better in the next month, up from 13.8%.

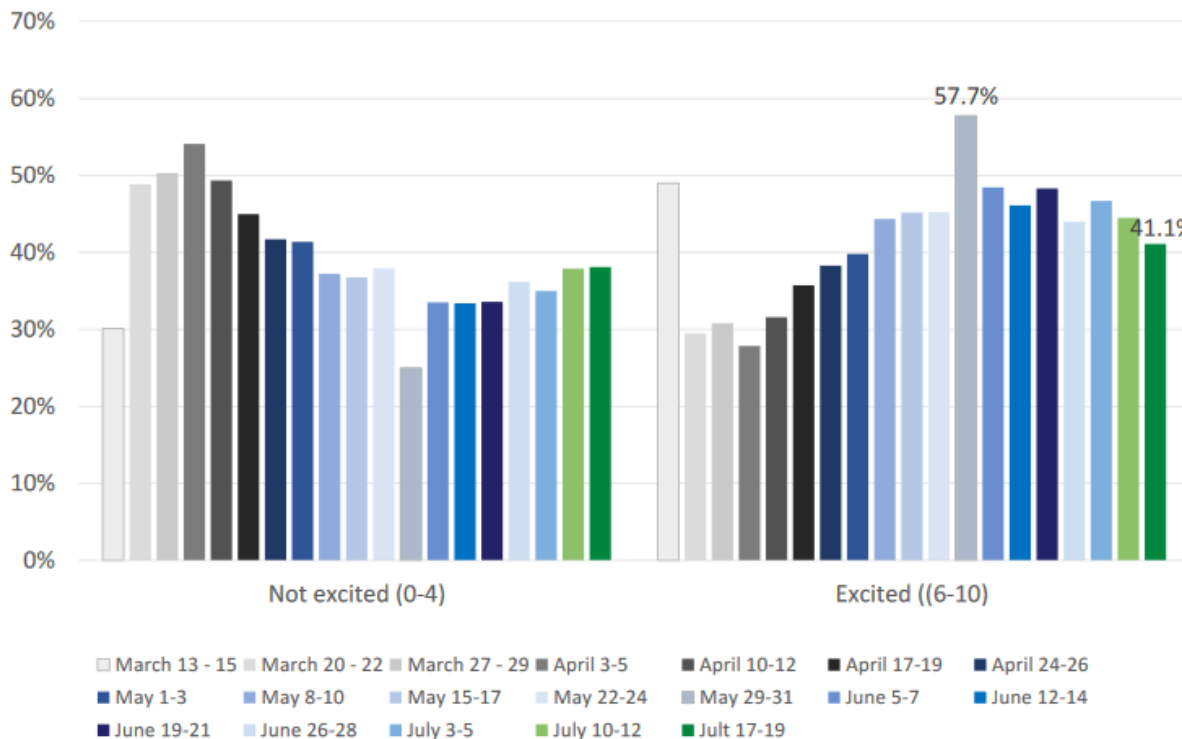
Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)
 In the next month the coronavirus situation will _____

(Base: 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, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)



Excitement to Travel Now (Excited vs. Not Excited)

Their travel spirits, however, remain significantly depressed. Yet another record 46.7% of American travelers now say they don't have any trip plans for the remainder of 2020. Only 41.1% express any meaningful enthusiasm about the possibility of taking a getaway in the next month (down from 57.7% at the end of May), and just 36.6% feel open to travel inspiration—levels not recorded since the height of the lock-down in April.



Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: 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, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)

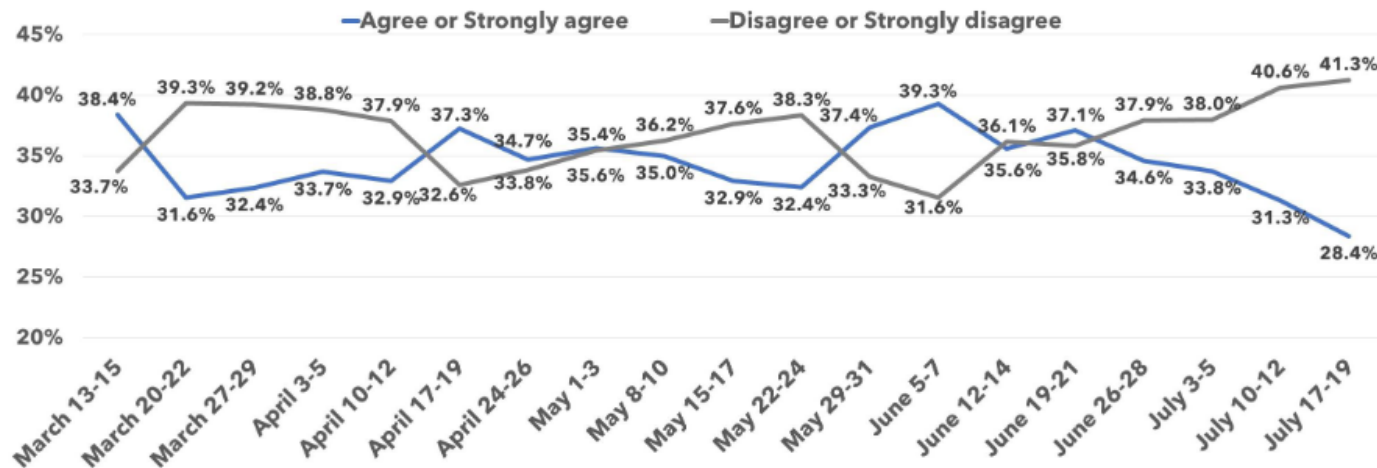


Travel Discounts

Even discounts and price cuts' ability to motivate travel in the next 3 months is down to 28.4%, with a larger proportion of travelers disagreeing that deals could get them to find traveling more attractive.

HOW MOTIVATIONAL TRAVEL DISCOUNTS ARE FOR NEAR-TERM TRAVEL: MARCH—JULY 2020

STATEMENT AGREEMENT: THE CORONAVIRUS HAS LED MANY TRAVEL PROVIDERS TO CUT THEIR PRICES. THESE DISCOUNTS AND PRICE CUTS (AIRLINE, HOTEL, ETC.) MAKE ME MORE INTERESTED IN TRAVELING IN THE NEXT THREE (3) MONTHS.

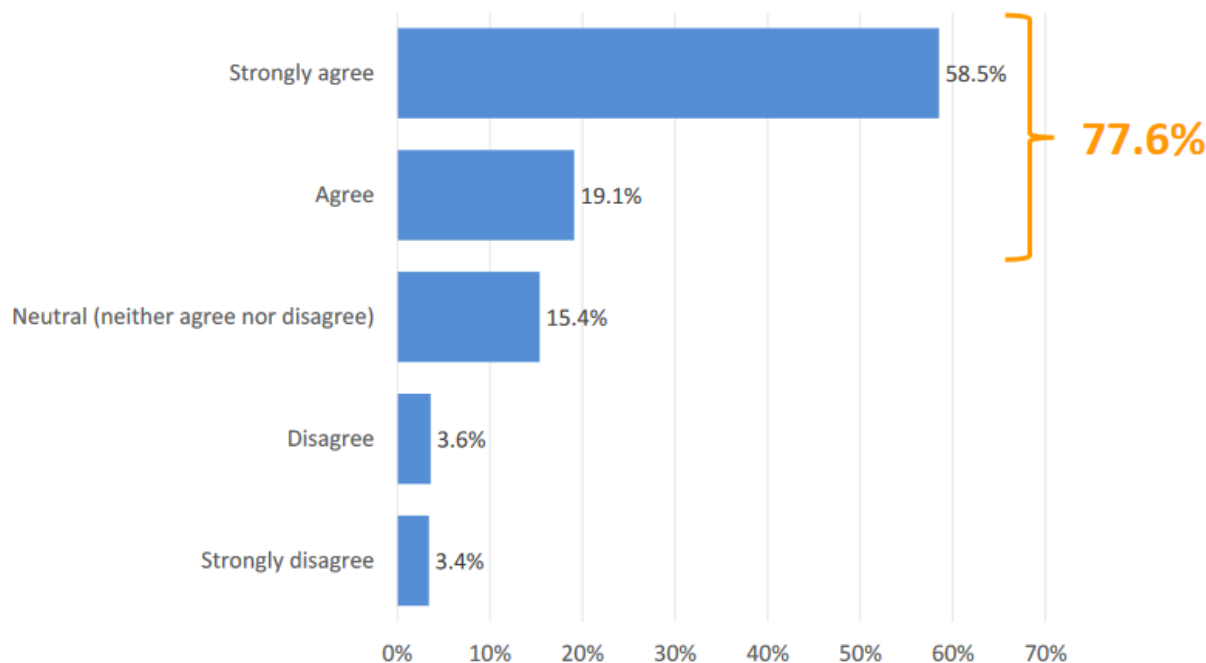


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)



Face Masks in Public

As the pandemic continues its assault on the United States and many travel and hospitality professionals find themselves leading or in the middle of mask debates, this week we looked into American travelers' likely use of masks while traveling and their support of mandatory policies. First, we found that **77.6% agree that face masks should be worn in public, and 66.6% say they "always" wear one while out** (those that don't always most commonly cite that there aren't enough people around for it to be necessary).



Question: How much do you agree with the following statement?

Statement: In this environment, people should wear face masks when they are in public.

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)



Practiced Pandemic-Era Travel Etiquette

Right now, 68.8% of American travelers plan to wear a face mask during trips taken over the next 6 months. American travelers also largely plan to practice other pandemic etiquette such as following social distancing guidelines.



Question: If you were to take a trip in the next six months, which would you be likely to do? (Select all that apply)

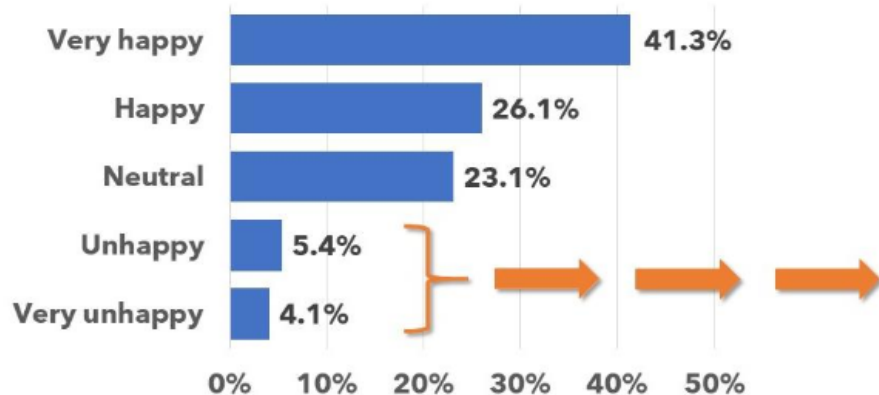
(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)

Feelings About Destinations Requiring Masks

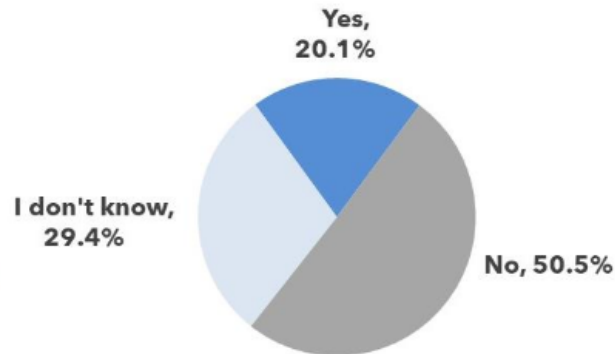
When asked how they would feel if a destination they wanted to visit required visitors and residents to wear masks while in public, over two-thirds (67.4%) said that would make them happy or, most likely, very happy. Those 9.5% that expressed unhappiness about a mask mandate were asked if this requirement alone would be enough to keep them from visiting a place they otherwise wanted to visit. One in five of this group said it would, half said no and the remaining 30% said they weren't sure.

FEELINGS ABOUT DESTINATIONS REQUIRING MASKS

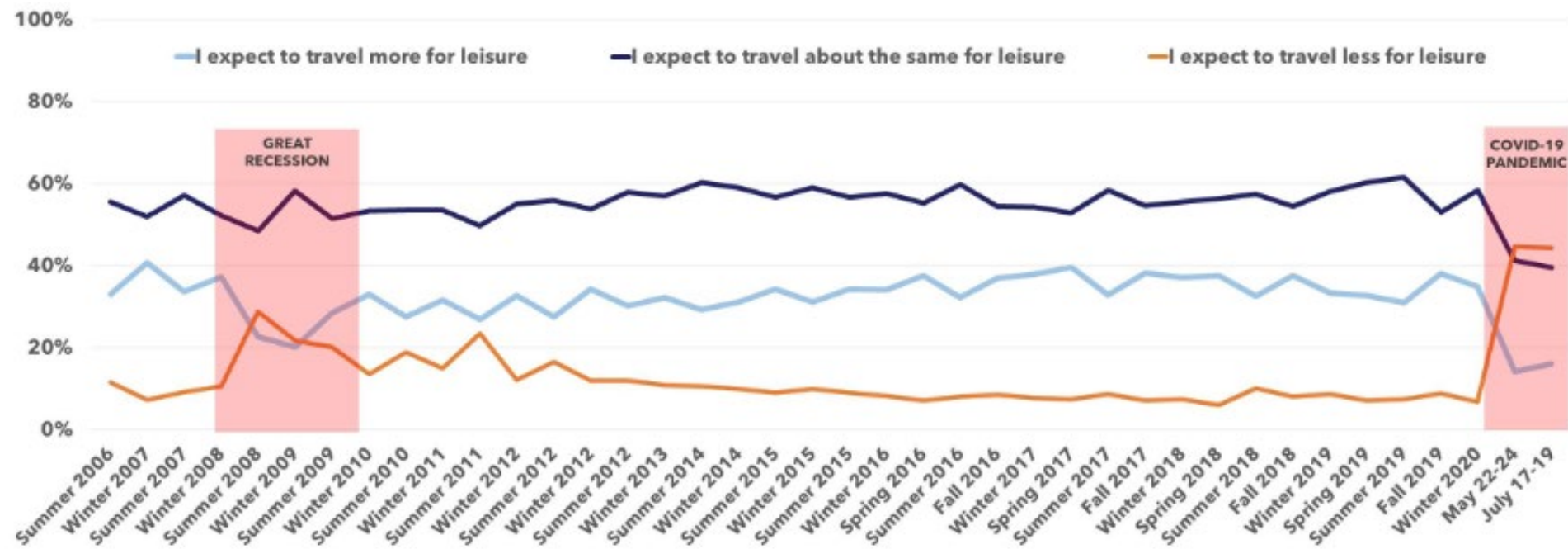
Q: WHICH BEST DESCRIBES HOW YOU WOULD FEEL IF A DESTINATION YOU WANTED TO VISIT REQUIRED VISITORS AND RESIDENTS TO WEAR MASKS WHILE IN PUBLIC?



Q: WOULD THIS REQUIREMENT ALONE BE ENOUGH TO KEEP YOU FROM VISITING A PLACE YOU OTHERWISE WANTED TO VISIT?



HISTORICAL PERSPECTIVE: LEISURE TRAVEL EXPECTATIONS (TRIPS TAKEN) (AS OF JULY 20TH)



Q: IN THE NEXT 12 MONTHS, DO YOU EXPECT TO TRAVEL MORE OR LESS FOR LEISURE THAN YOU DID IN THE MOST RECENT 12-MONTH PERIOD?

(Base: Wave 11 and Wave 19 data. All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-224 and July 17-19, 2020)



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
 - ***Wednesday, July 29, 2pm ET/1pm CT***

Evaluations!

