



MAINE OFFICE OF TOURISM

Consumer Sentiment Study
August 2020

Presented by Downs & St. Germain Research

MAINE OFFICE OF TOURISM

Introduction



Study Purpose & Research Methods

Study Purpose

Determine the impact of COVID-19 on consumers' feelings about travel and travel-related advertising.

Research Methods

Data were collected July 29 - August 1, 2020 through online surveys with 400 consumers in

- Maine
- Connecticut
- Massachusetts
- New Hampshire
- New Jersey
- New York
- Rhode Island
- Vermont

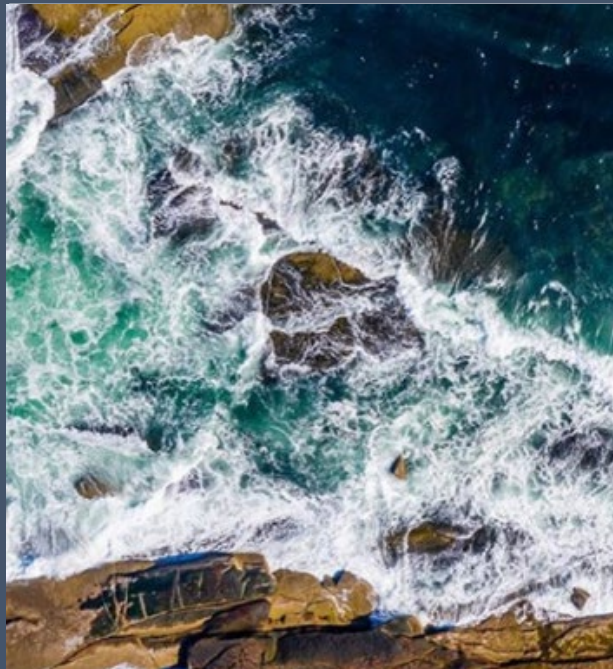
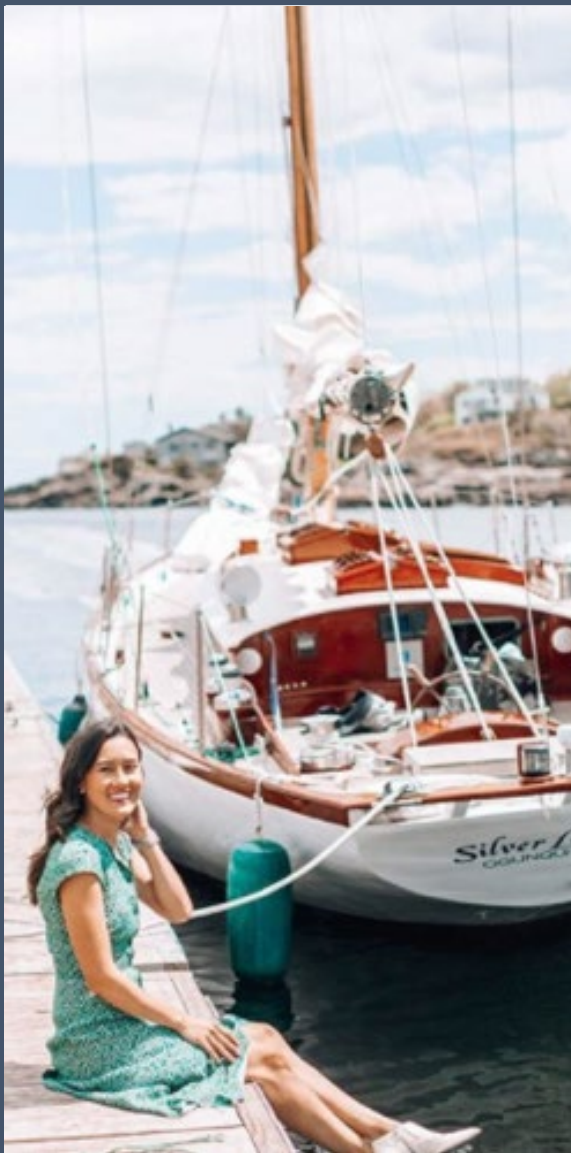
Consumers were adults between 21 - 70 years old who earned at least \$60,000 per year in household income, served as key household vacation decision-makers, and had stayed in paid accommodations in 2019.



MAINE OFFICE OF TOURISM

Key Takeaways





Key Takeaways

5

1) Consumers are more comfortable traveling to spend time outdoors, and feel safe participating in **outdoor activities** (72%), **visiting a state or national park** (61%), and **going to a beach** (57%). This data supports the focus on promotion of the **coastline** and **Acadia National Park** in the **Unrestricted States Campaign**.

2) **94%** of Maine residents would consider **visiting other areas of Maine** right now, highlighting the importance of continuing to inspire Mainers to rediscover and revisit the places they call home through the **Maine State Campaign**.



Maine
VISITMAINE.COM

Key Takeaways

6

3) The **Travel Safe Campaign** continues to be an effective way to reach consumers, as **ALL the top messaging options** that consumers want to hear from destinations right now **relate to safety**.

4) **State government** mandates and decisions surrounding COVID-19 will influence consumers decisions to travel, as **over half** of consumers trust in **state government** as a source to tell them it is safe to vacation again. This percentage is significantly higher than that of consumers in southeastern states (where restrictions have been more relaxed than Maine).



Key Takeaways

7

5) **Destination websites are more important than ever** as potential visitors are utilizing these sites more often when planning their trip.

6) **7 in 10** consumers are **aware of the current travel restrictions** for out-of-state visitors and **4 in 5** consumers **support these restrictions**

MAINE OFFICE OF TOURISM

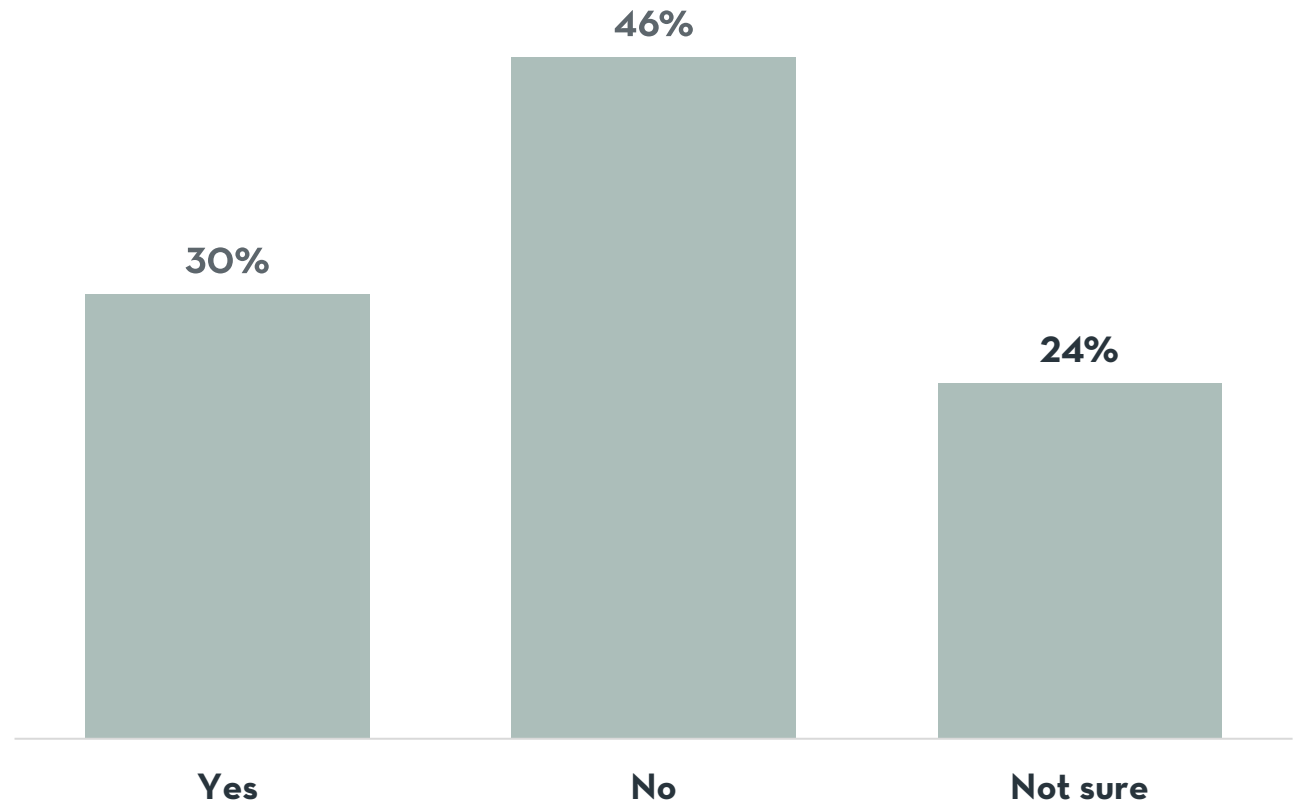
Detailed Findings



Opinions on Travel Safety

3 in 10 consumers believe that it is safe to vacation again, while almost half still feel it is not safe

NOW THAT MANY BEACHES, RESTAURANTS, ATTRACTIONS, ETC ARE OPEN OR WILL BE OPENING SOON, DO YOU FEEL IT IS SAFE TO VACATION AGAIN?



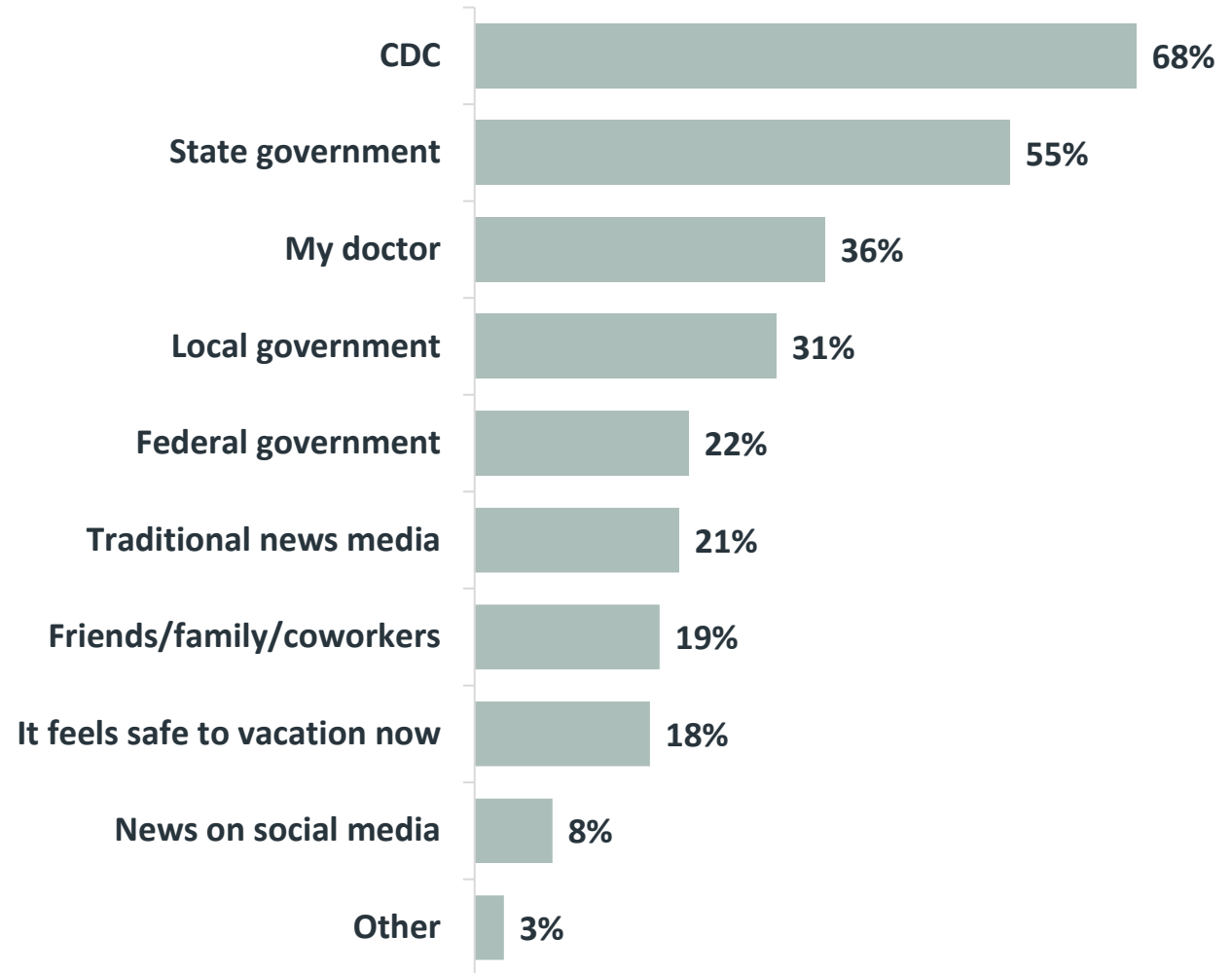
Trust in Travel Advice

Trust in the Centers for Disease Control and Prevention ranks **significantly higher** as a trusted source than other sources to tell consumers when it is safe to travel again

Over half of consumers trust in state government as a source to tell consumers it is safe to vacation again

Less than 1 in 5 consumers feel it is safe to vacation now

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



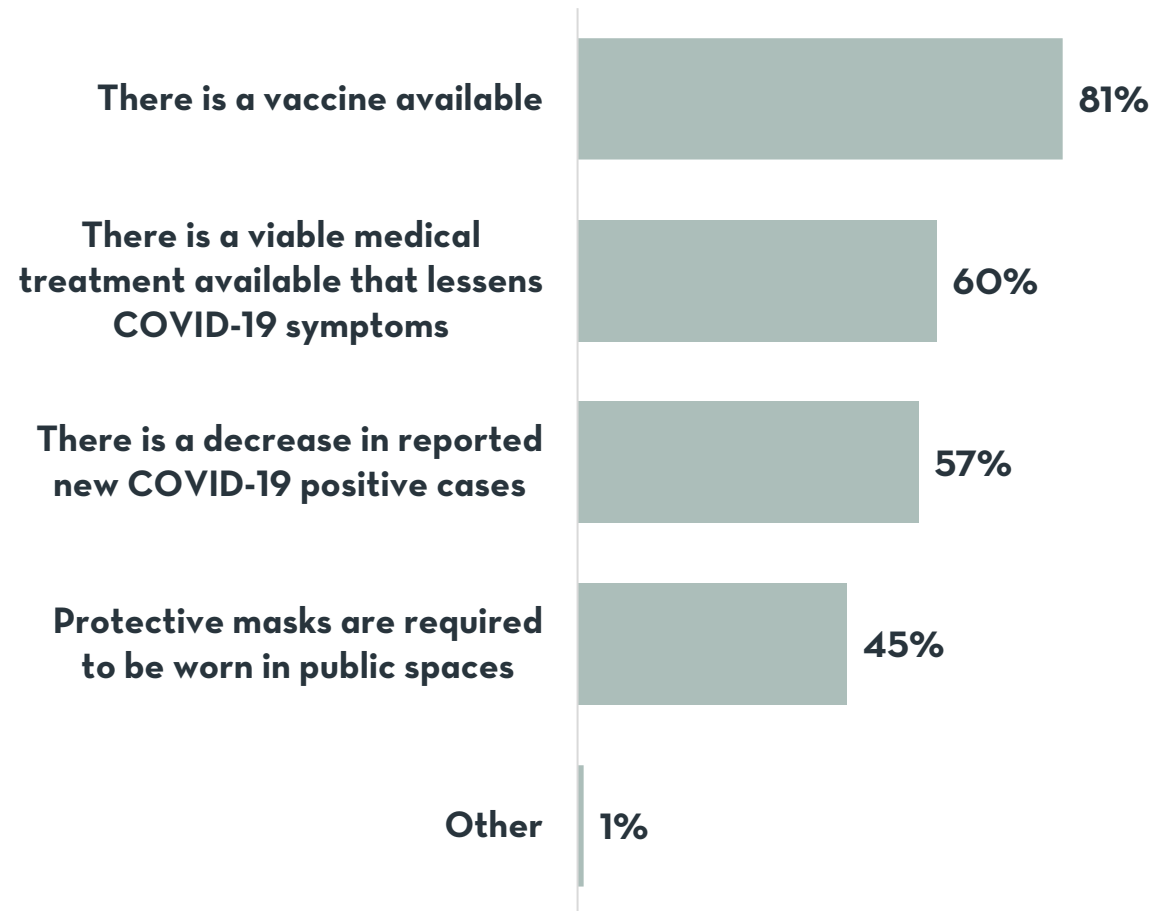
*Multiple responses permitted.

Opinions on Travel Safety Indicators

Consumers who do not feel safe or are unsure about traveling will rely heavily on the **availability of a vaccine** to determine when it is safe to travel again.

About **3 in 5** consumers will rely on a **viable medical treatment** and a **decrease in reported new cases** of COVID-19 to determine the safety of travel

PEOPLE WHO DO NOT FEEL SAFE VACATIONING NOW, WILL FEEL SAFE WHEN*:



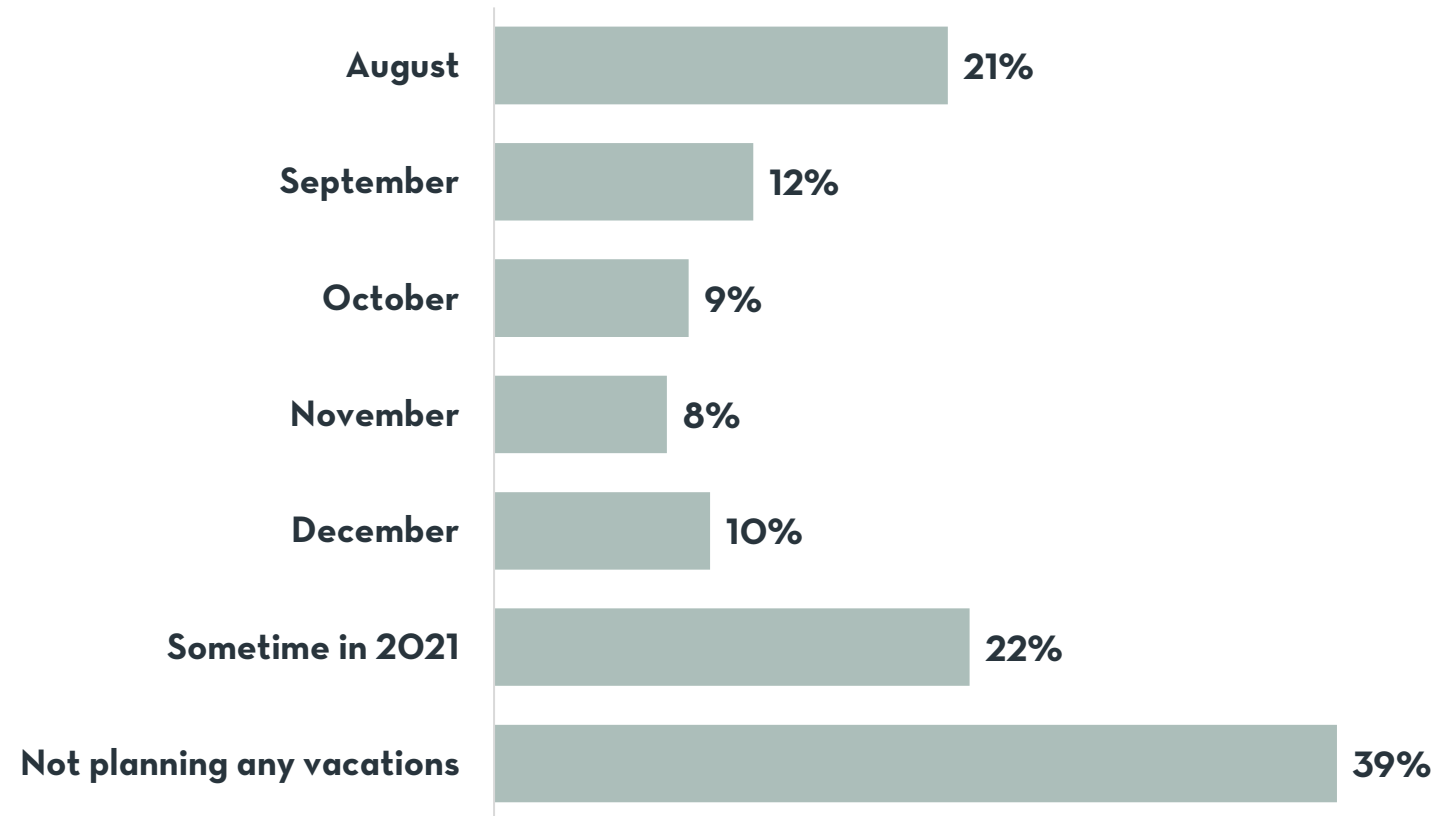
*Multiple responses permitted.

Planned Vacations & Long Getaways

1 in 5 consumers has vacations planned for **August**, while another **1 in 5** are not planning a vacation until **sometime next year**

2 in 5 consumers are not planning any vacations or long getaways

PLANNING A VACATION FOR THE FOLLOWING MONTHS*



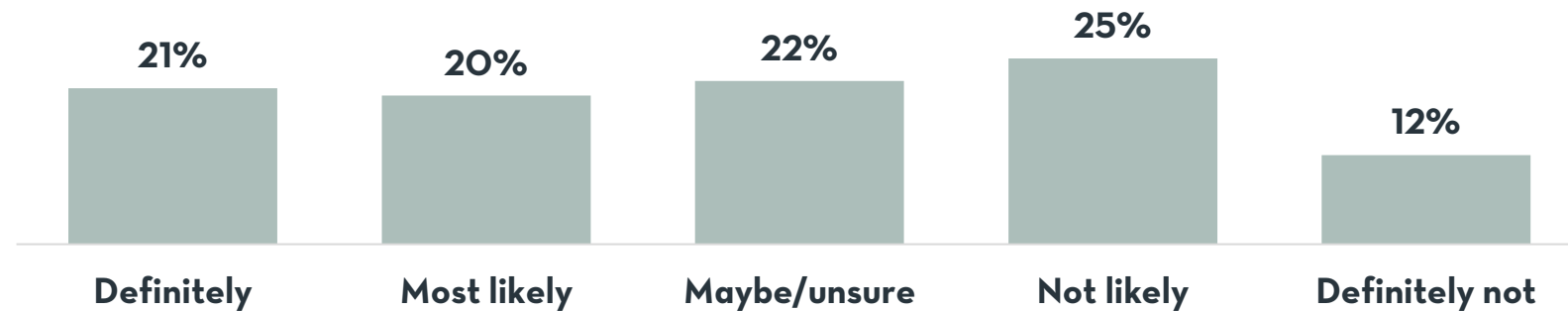
*Multiple responses permitted.

Likelihood of Travel in the Next Two Months

Consumers are split on the likelihood of traveling for a long weekend or a vacation in the next two months

41% are highly likely to travel in the next two months, while **37%** are not likely to travel

HOW LIKELY ARE YOU TO TAKE A LONG WEEKEND OR VACATION IN THE NEXT TWO MONTHS?



Perception of Safety in Travel Activities

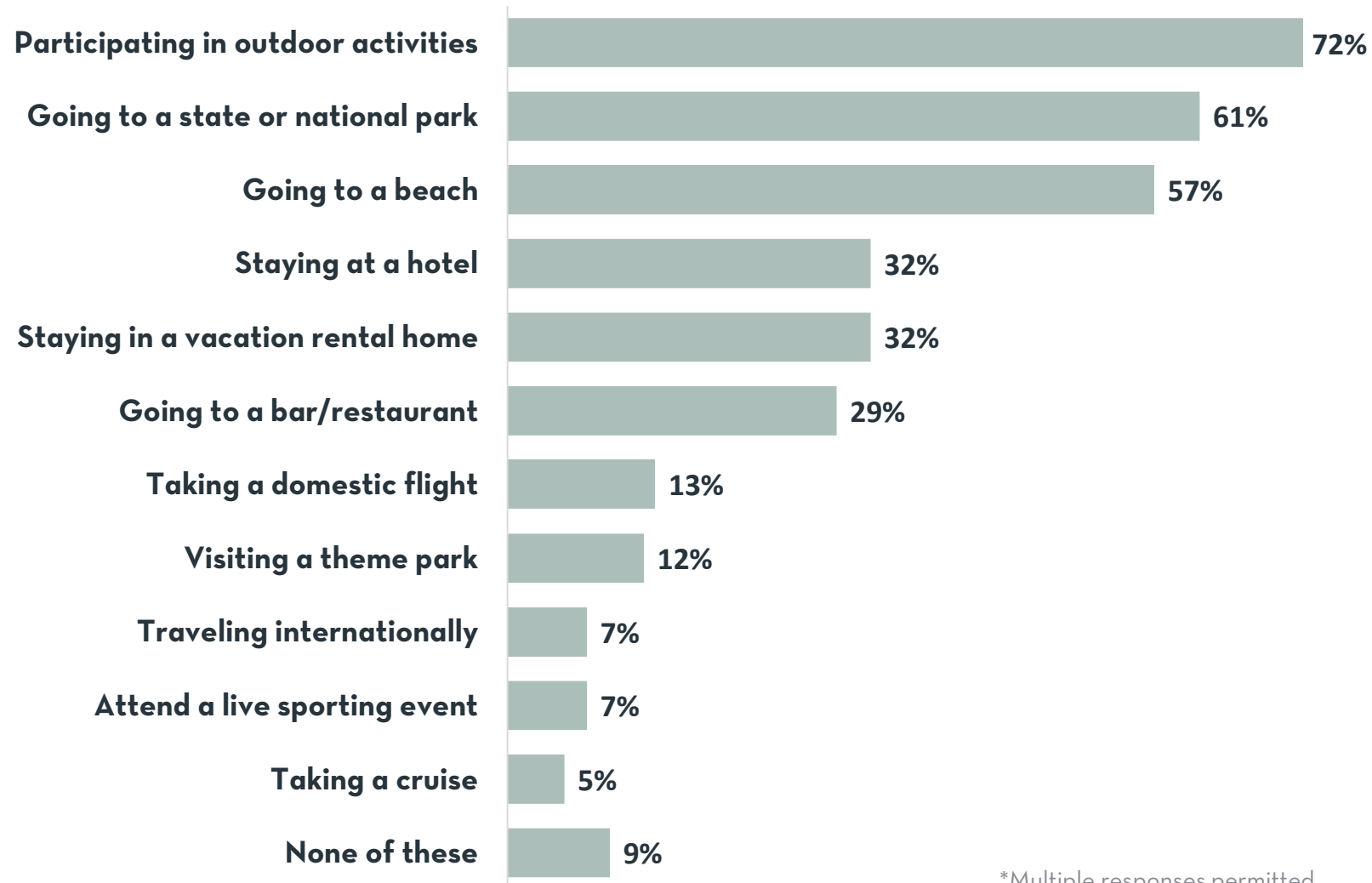
Consumers are more comfortable traveling to spend time **outdoors**, such as:

- Participating in **outdoor activities** (hiking, biking, etc.)
- Going to a **state or national park**
- Going to a **beach**

Only **1 in 3** consumers feel it is safe to stay in a **hotel** or **vacation rental**

FEEL SAFE DOING THE FOLLOWING*

14



*Multiple responses permitted.

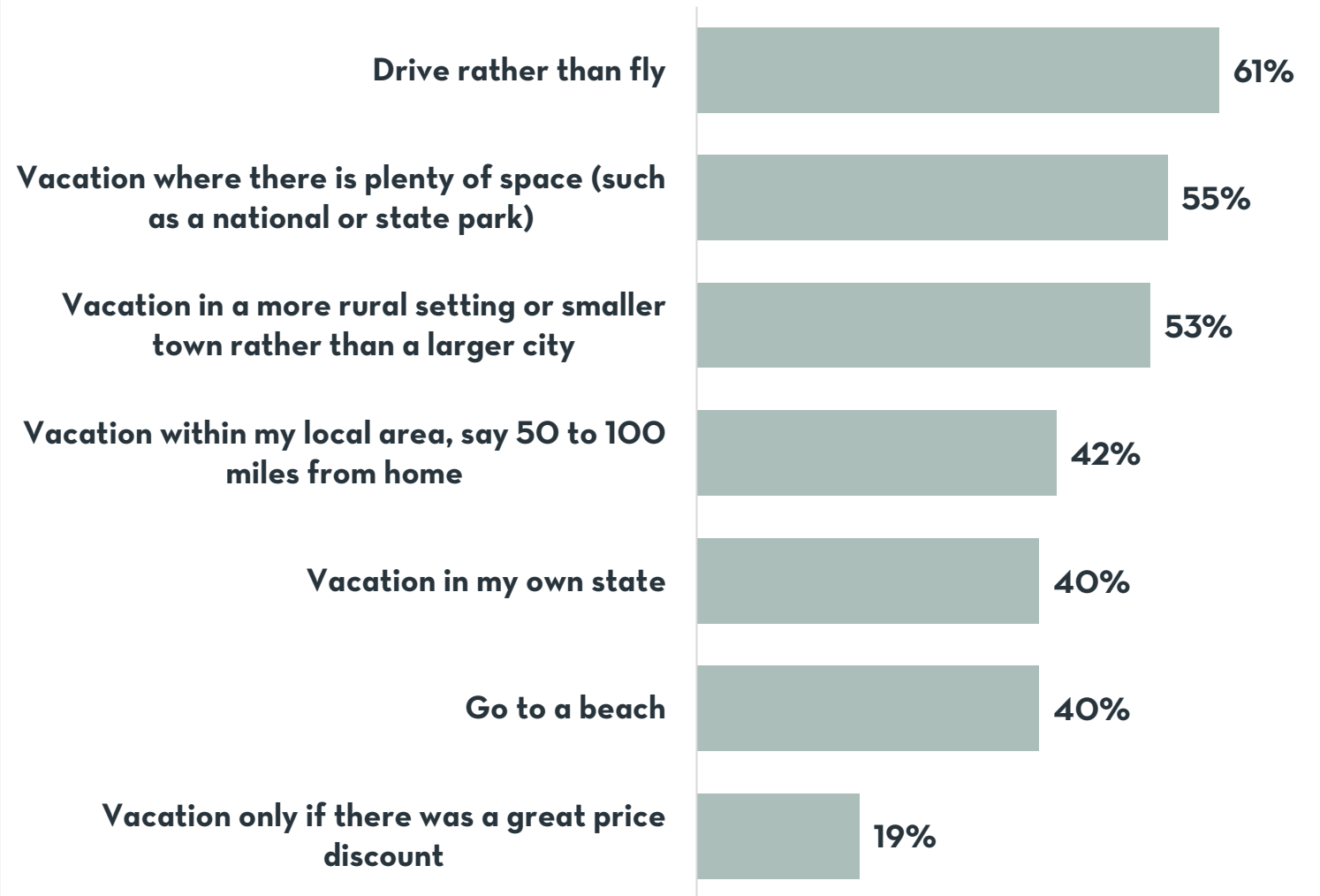
Current Travel Preferences

3 in 5 consumers currently prefer driving over flying

Over **half** of consumers prefer to vacation where there **is plenty of space**, or in **rural settings or smaller towns**

TRAVEL PREFERENCES*

15

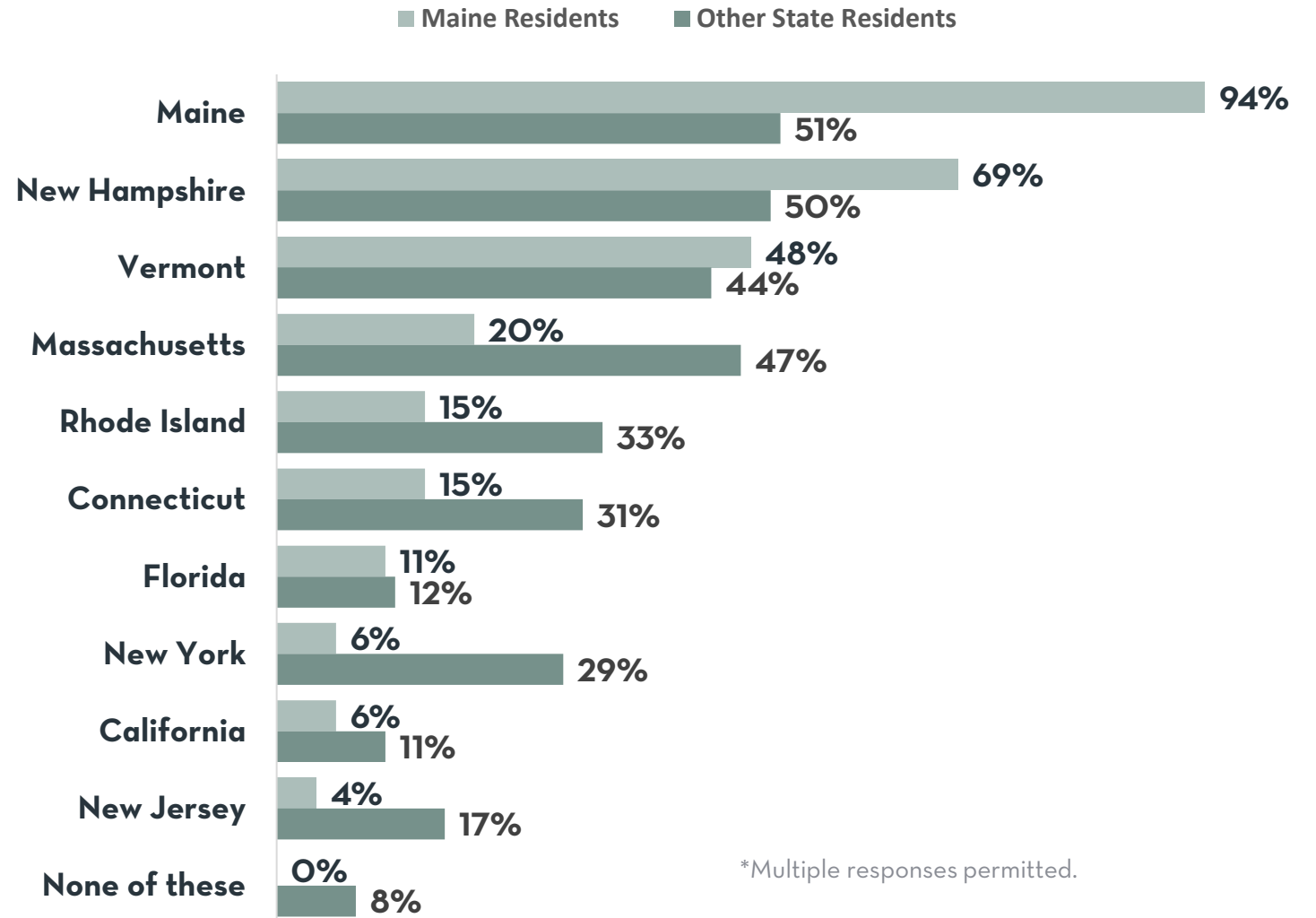


*Multiple responses permitted.

Travel Destinations Currently Considering

Over half of consumers who live outside of Maine would consider visiting **Maine** right now

WHICH STATES WOULD YOU CONSIDER VISITING RIGHT NOW?*



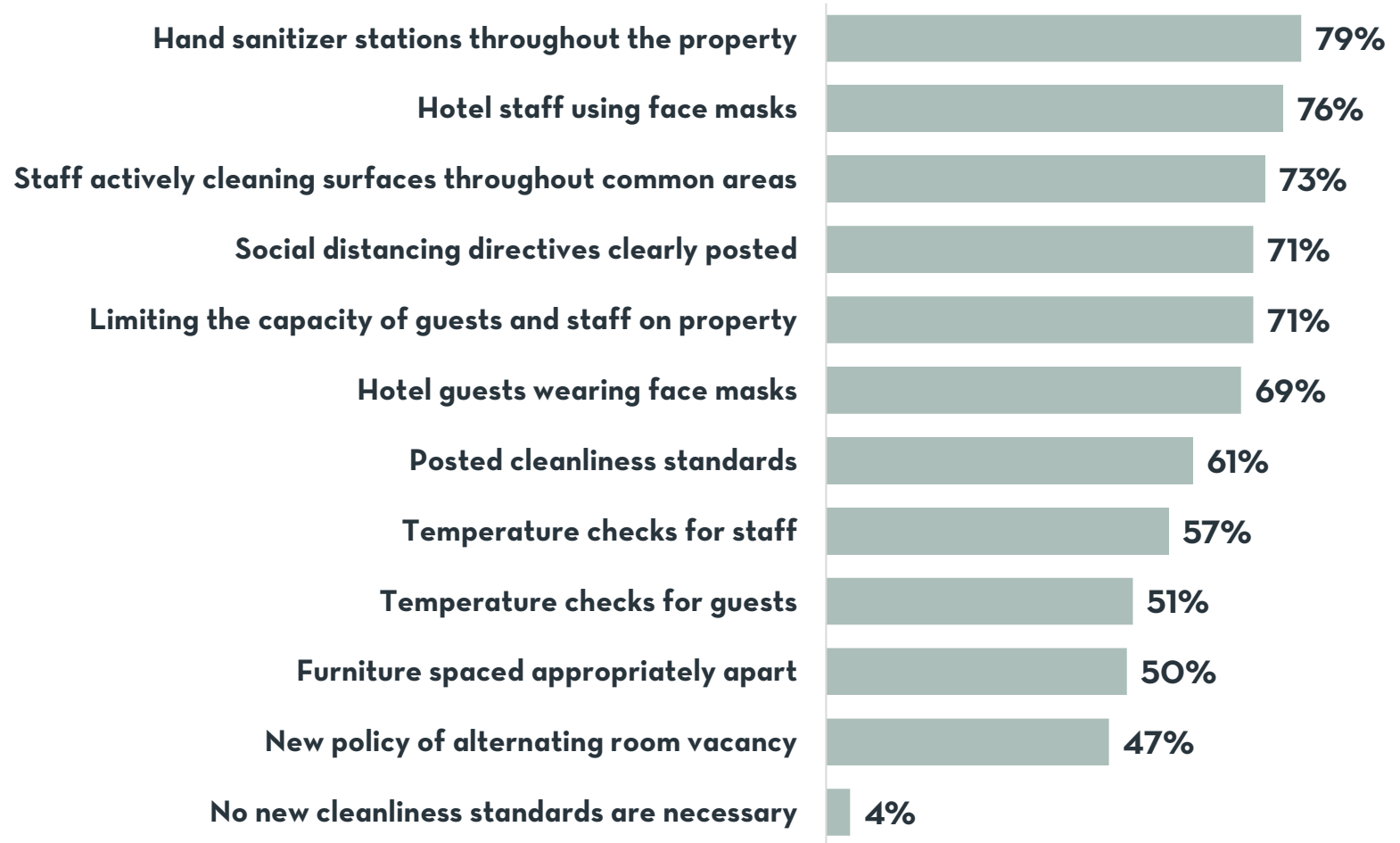
*Multiple responses permitted.

Desired Cleanliness Standards

Nearly all consumers (96%) expect some new cleanliness standards when they decide to travel again

WHAT NEW CLEANLINESS STANDARDS WILL YOU BE LOOKING FOR AS YOU PLAN YOUR POST COVID-19 TRAVEL?*

17

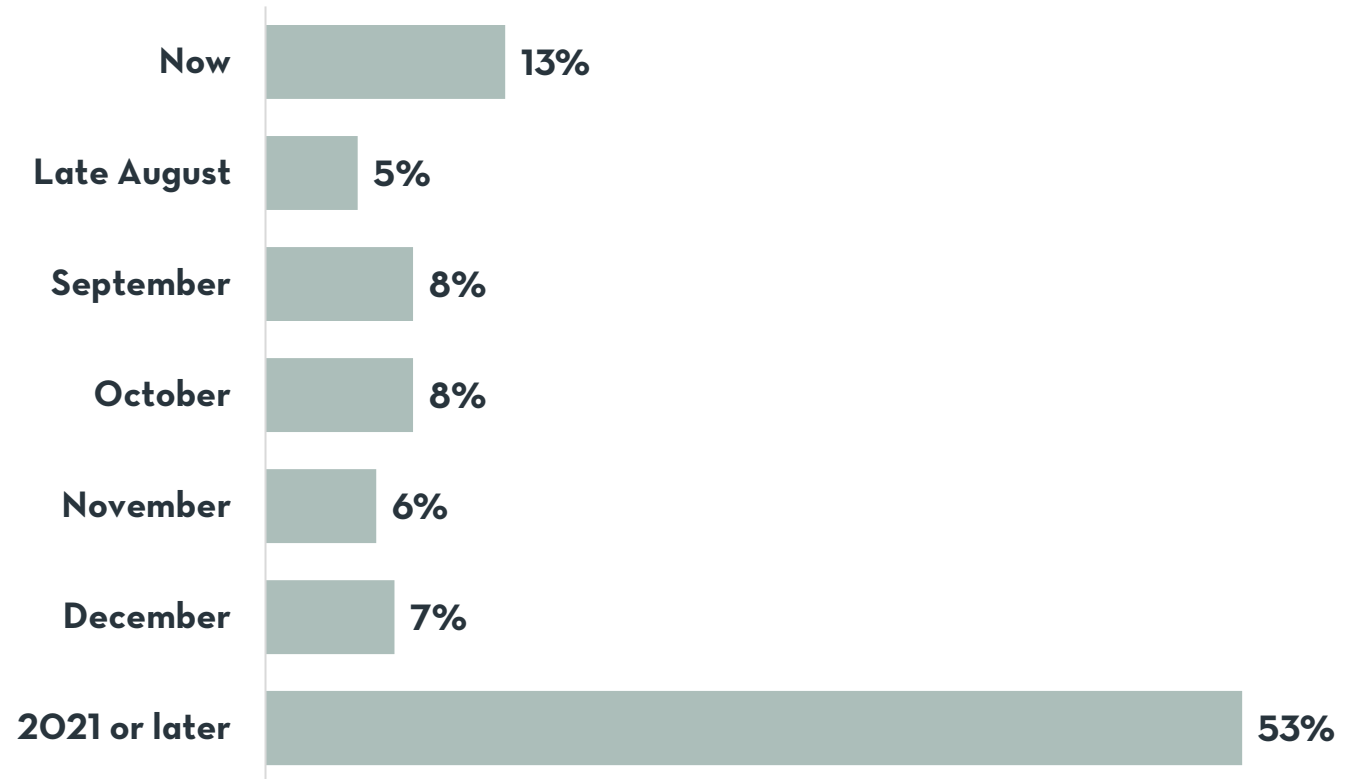


*Multiple responses permitted.

Continuation of Travel Advertising

Over half of consumers feel it will be appropriate to resume normal advertising **next year**

APPROPRIATE TIME FOR DESTINATIONS TO RESUME NORMAL ADVERTISING



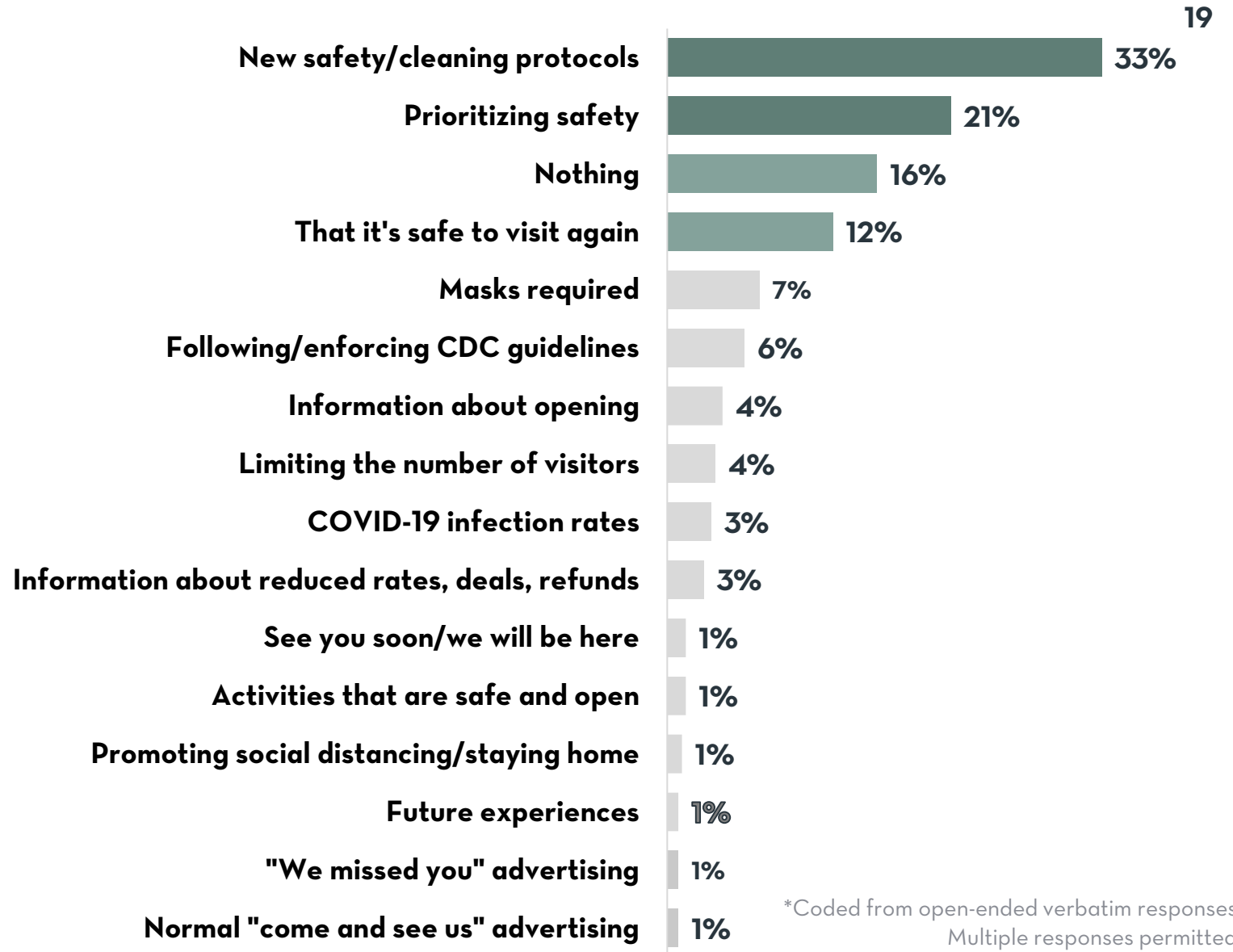
Desired Messaging from Destinations/Attractions

1 in 3 consumers want to see **safety and cleaning protocols** that destinations and attractions are enforcing

16% of consumers **don't want to see any advertising** from destinations or attractions right now



WHAT MESSAGE OR INFORMATION WOULD YOU LIKE TO HEAR OR SEE FROM DESTINATIONS/ATTRACTIONS NOW?*

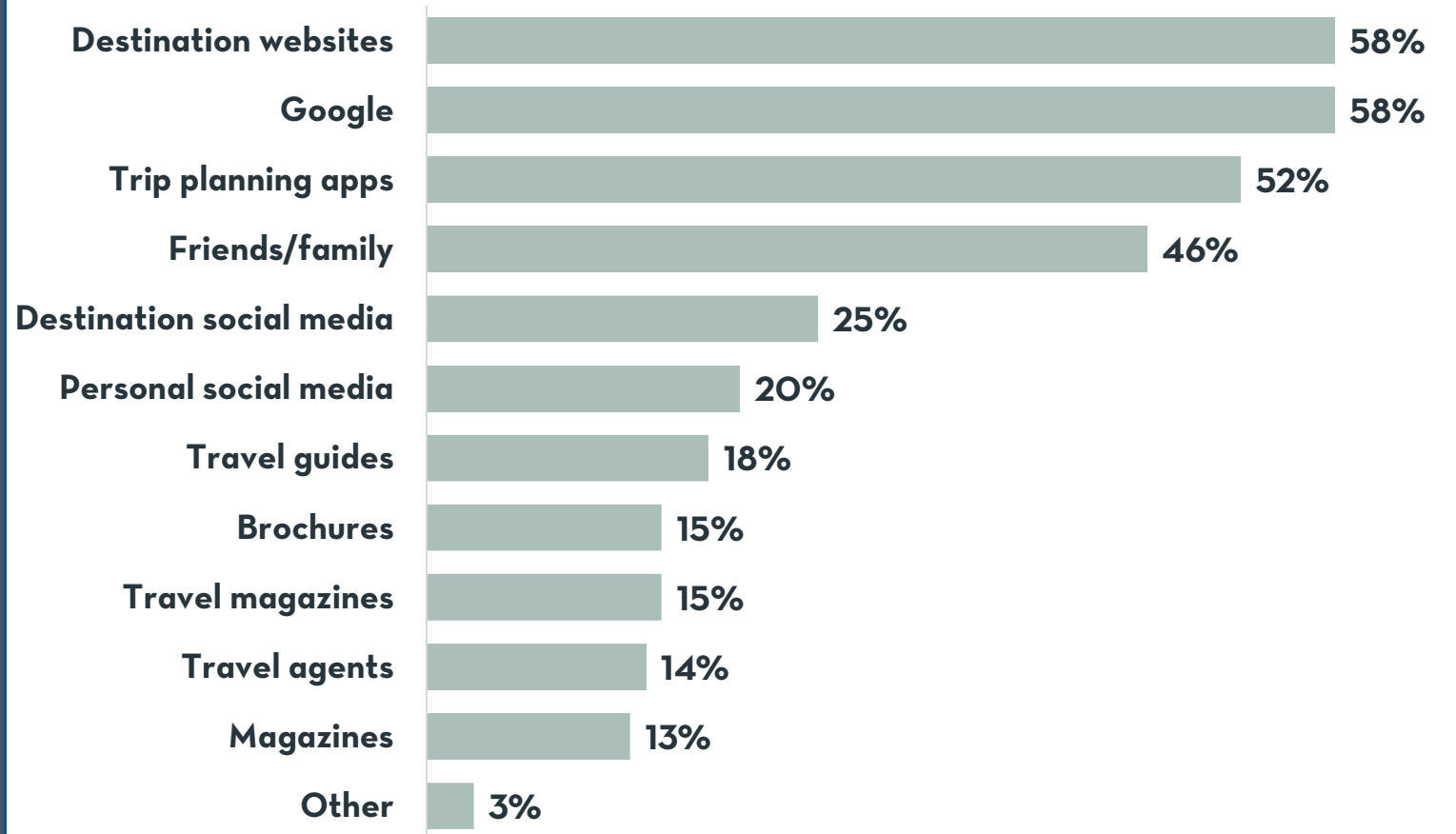


*Coded from open-ended verbatim responses. Multiple responses permitted.

Future Travel Planning Resources

Nearly 3 in 5 consumers will rely on destination websites and Google searches to help them plan their trips when they are ready to travel again

TOP PLANNING SOURCES WHEN READY TO TRAVEL AGAIN*



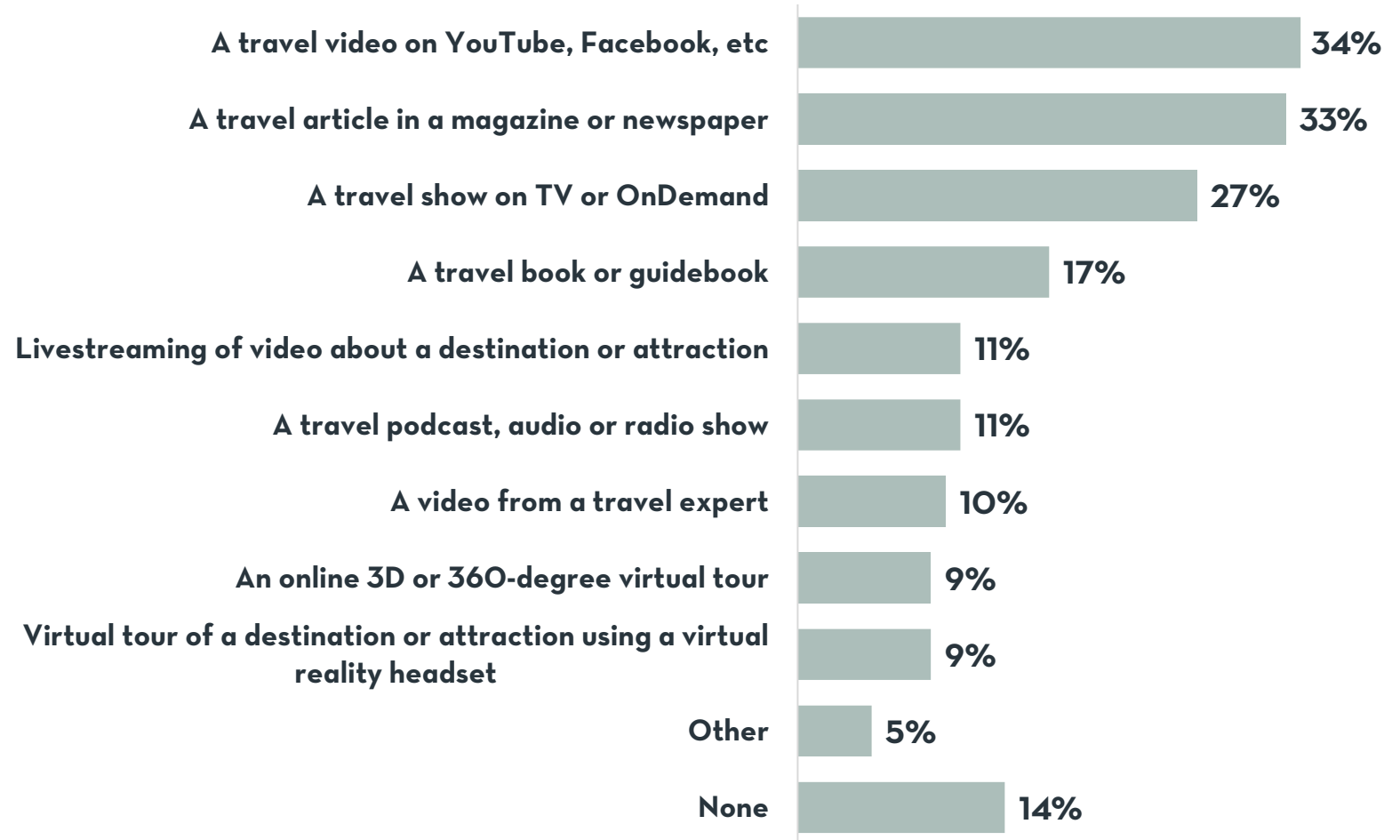
*Multiple responses permitted.

Recent Interactions with Travel Media

While most consumers are not planning trips, they are actively perusing travel media, as **86% have interacted with travel media recently.**

Travel videos and travel articles in magazines or newspapers are more frequently used travel media

TRAVEL MEDIA ACTIVITY IN THE PAST 2 WEEKS*



*Multiple responses permitted.

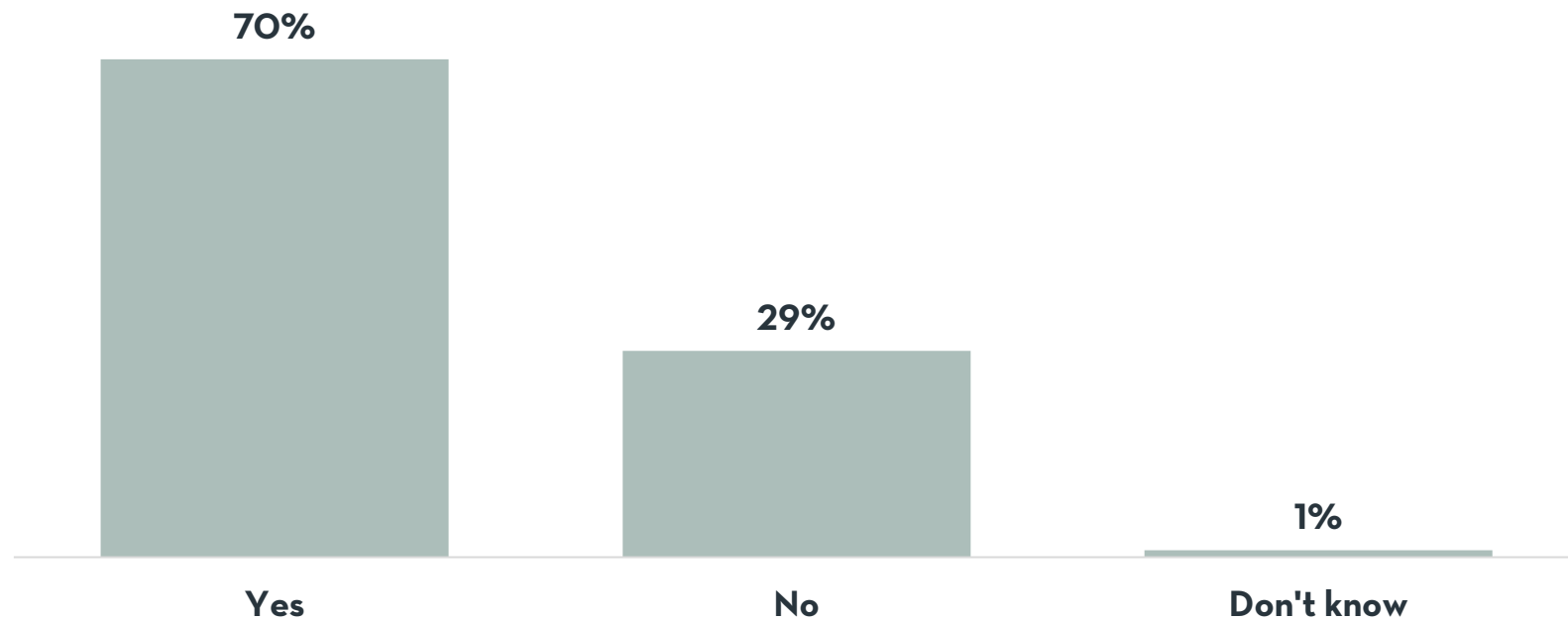


Aware of Maine Travel Restrictions

7 in 10 consumers are **aware** of the travel restrictions for out-of-state visitors to Maine

AWARENESS OF MAINE TRAVEL RESTRICTIONS

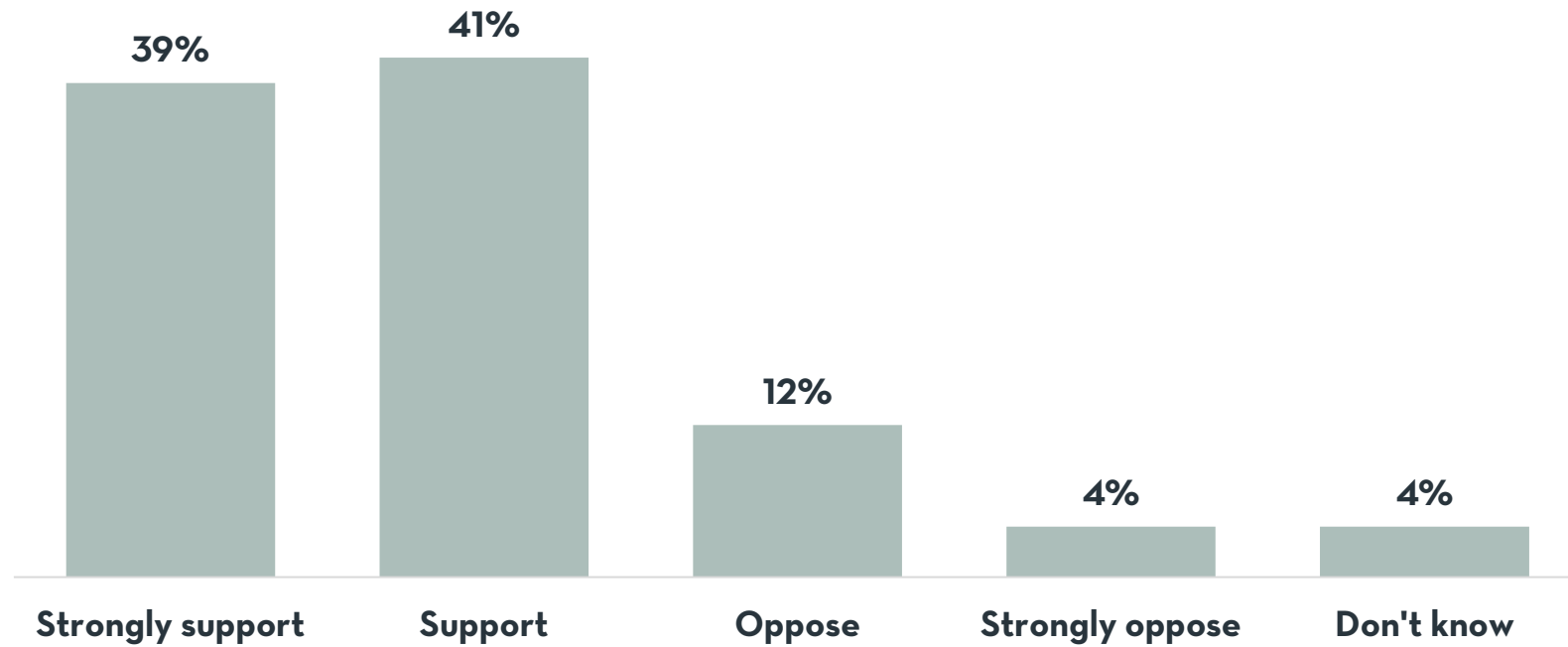
22



Support of Maine Travel Restrictions

4 in 5 consumers **support** the travel restrictions for out-of-state visitors to Maine

SUPPORT OF MAINE TRAVEL RESTRICTIONS

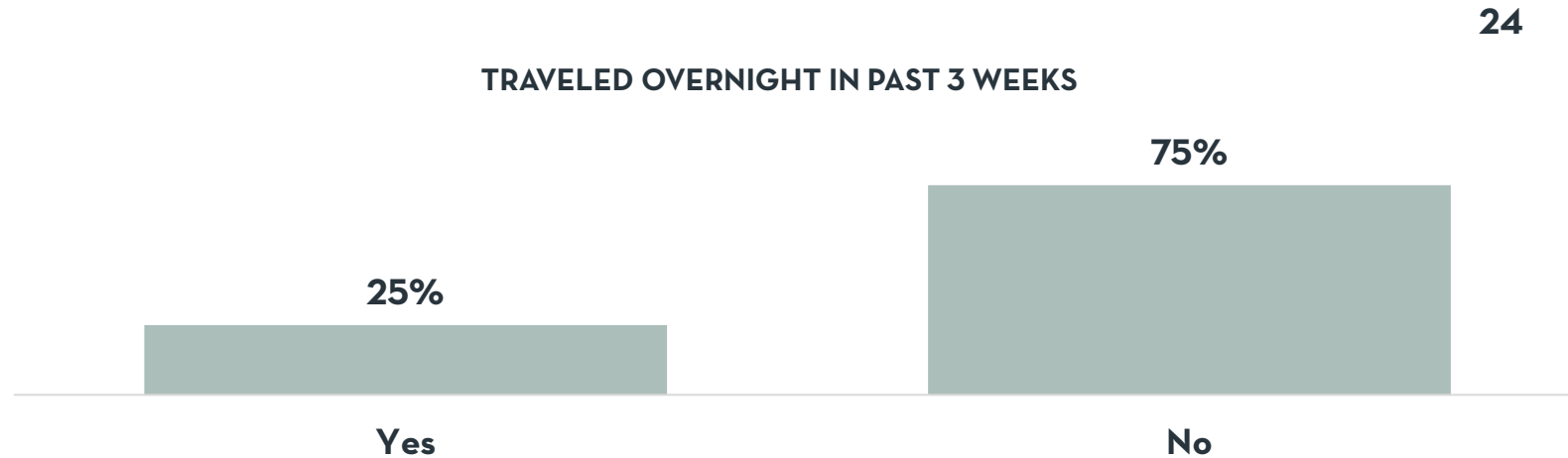


Recent Overnight Travel

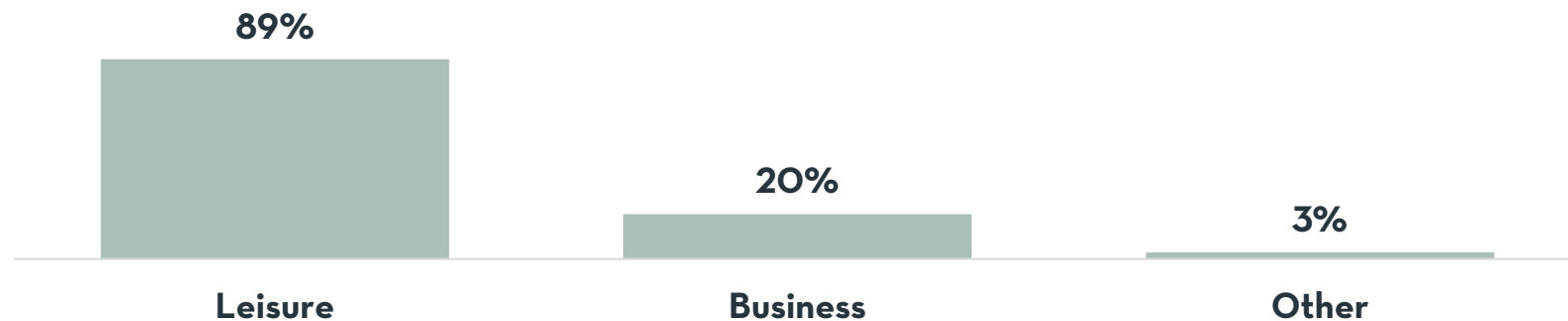
1 in 4 consumers traveled in the past 3 weeks

Of those who have traveled in the past three weeks, nearly **9 out of 10** traveled for **leisure purposes**

TRAVELED OVERNIGHT IN PAST 3 WEEKS



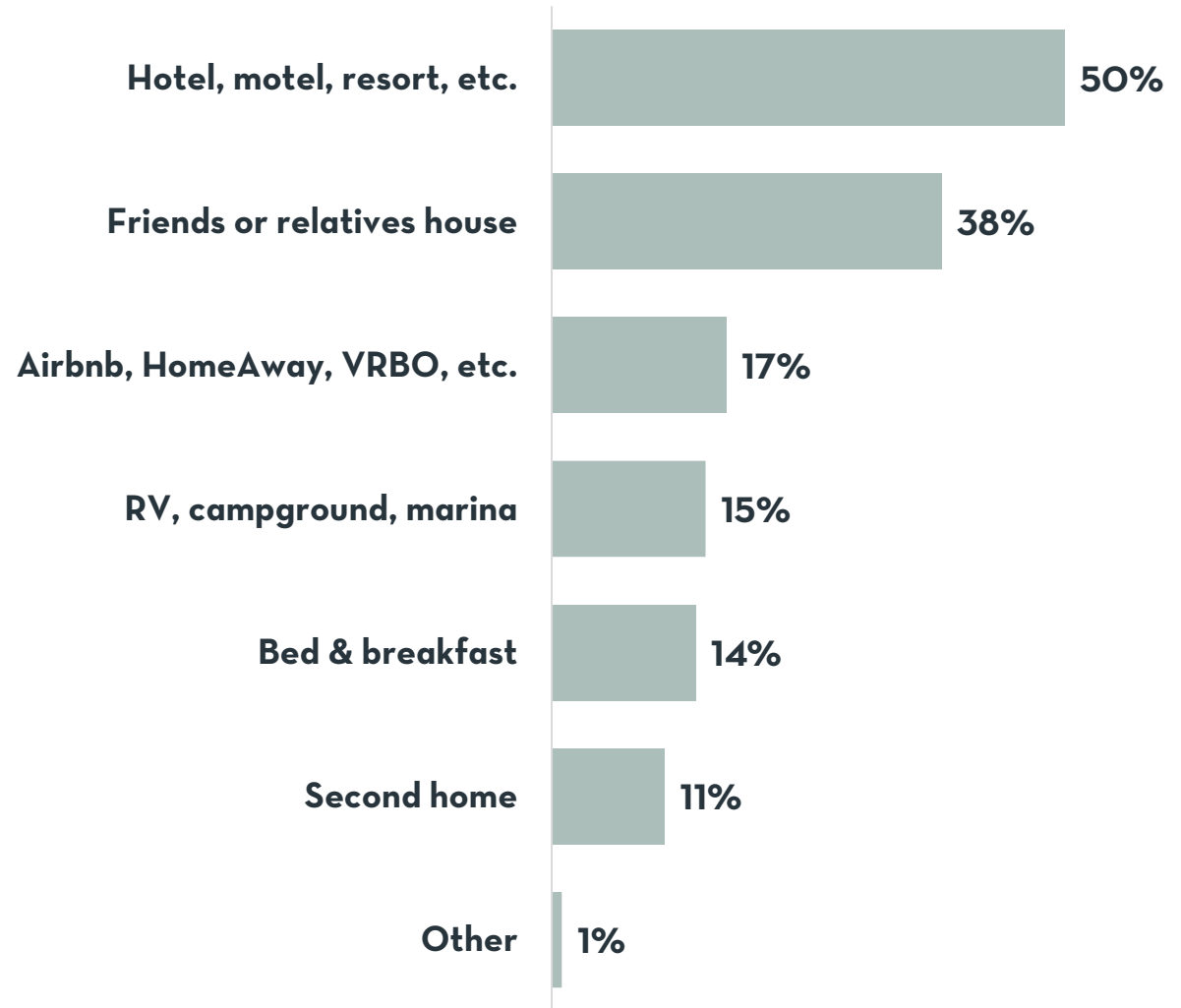
TYPE OF RECENT TRIP



Recent Trip Accommodations

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

ACCOMMODATIONS ON RECENT OVERNIGHT TRIP*

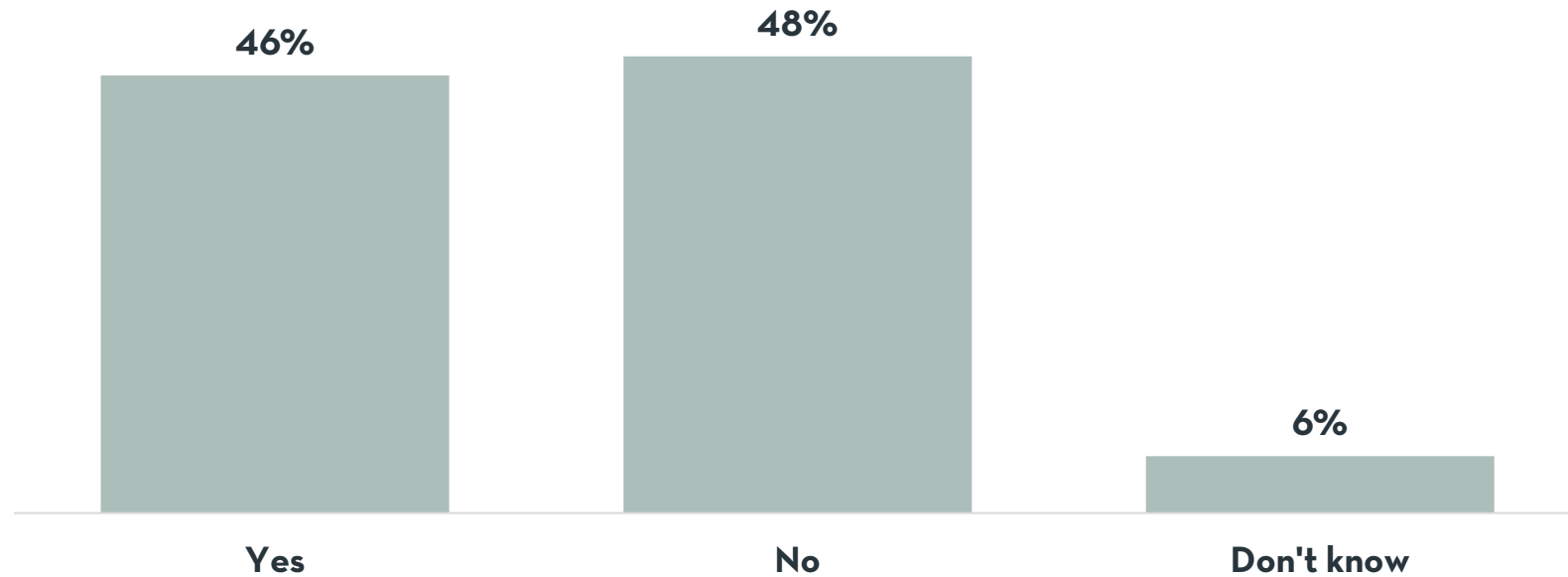


*Multiple responses permitted.

Trip Alterations Due to COVID-19

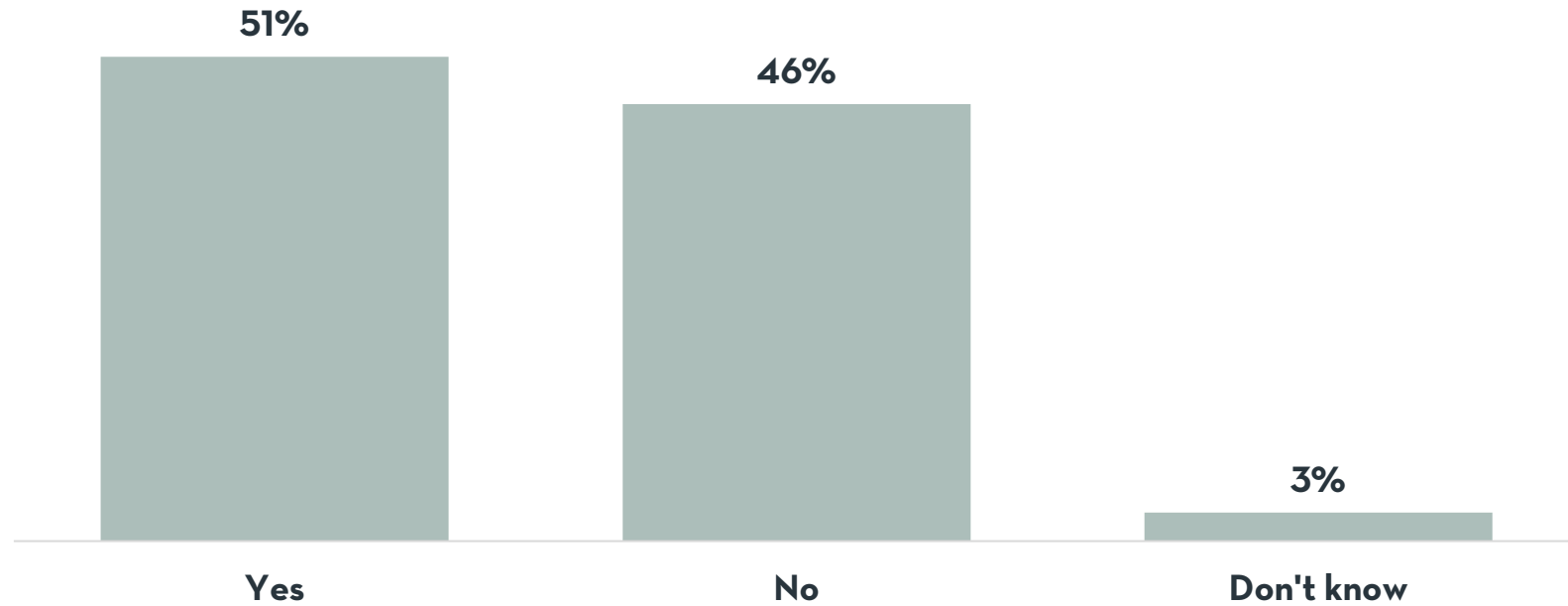
Nearly half of consumers who traveled in the past 3 weeks **changed their planned activities** for this trip due to the COVID-19 Pandemic

26
DID YOU CHANGE YOUR PLANNED ACTIVITIES FOR THIS TRIP BECAUSE OF THE COVID-19 PANDEMIC?



Trip Destination Choice

DID YOU CHOOSE YOUR DESTINATION ON THIS TRIP TO AVOID COVID-19?



Over half of consumers who traveled in the past 3 weeks **chose their trip destination** to avoid COVID-19

Current Associations with Travel

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

FEELINGS ABOUT TRAVEL RIGHT NOW



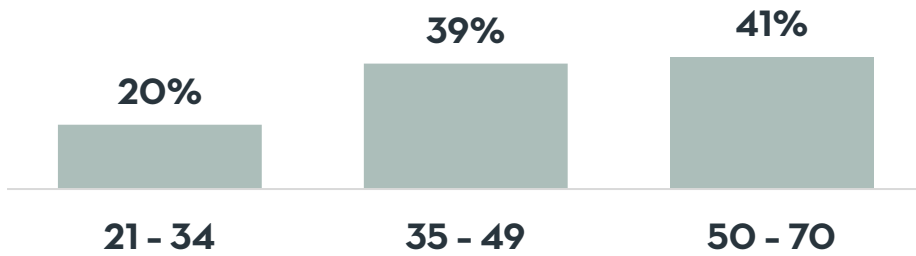
MAINE OFFICE OF TOURISM

Consumer Profile

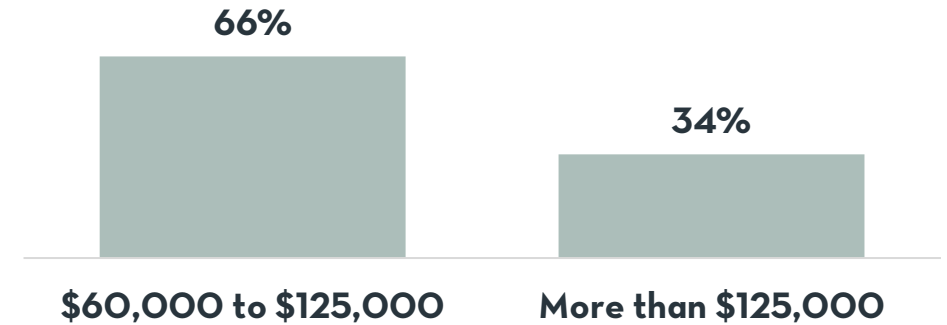


Consumer Profile*

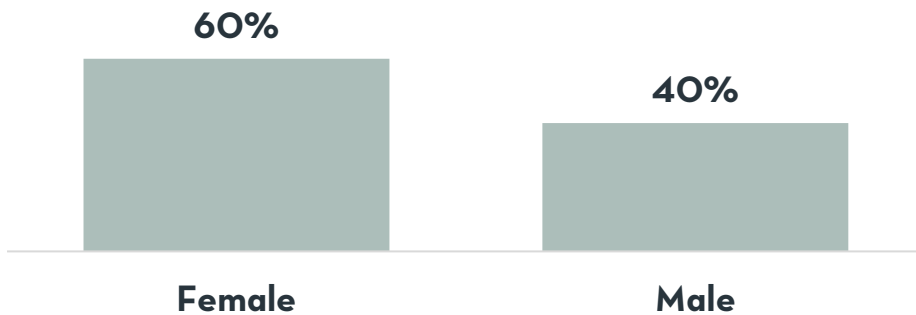
AGE



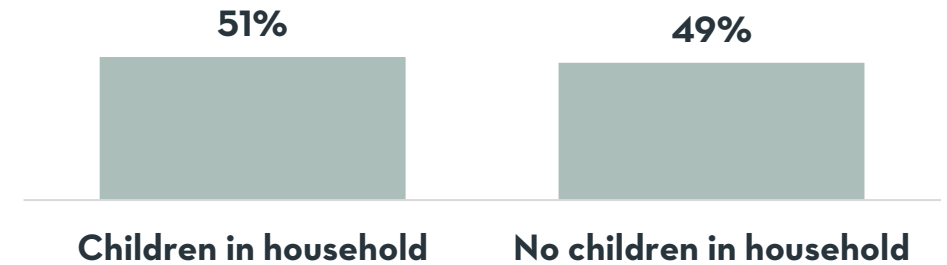
HOUSEHOLD INCOME



GENDER



HOUSEHOLDS WITH CHILDREN



*Demographic questions were used primarily to screen participants.



MAINE OFFICE OF TOURISM

Consumer Sentiment Study August 2020

Presented by Downs & St. Germain Research
dsg-research.com/800.564.3182