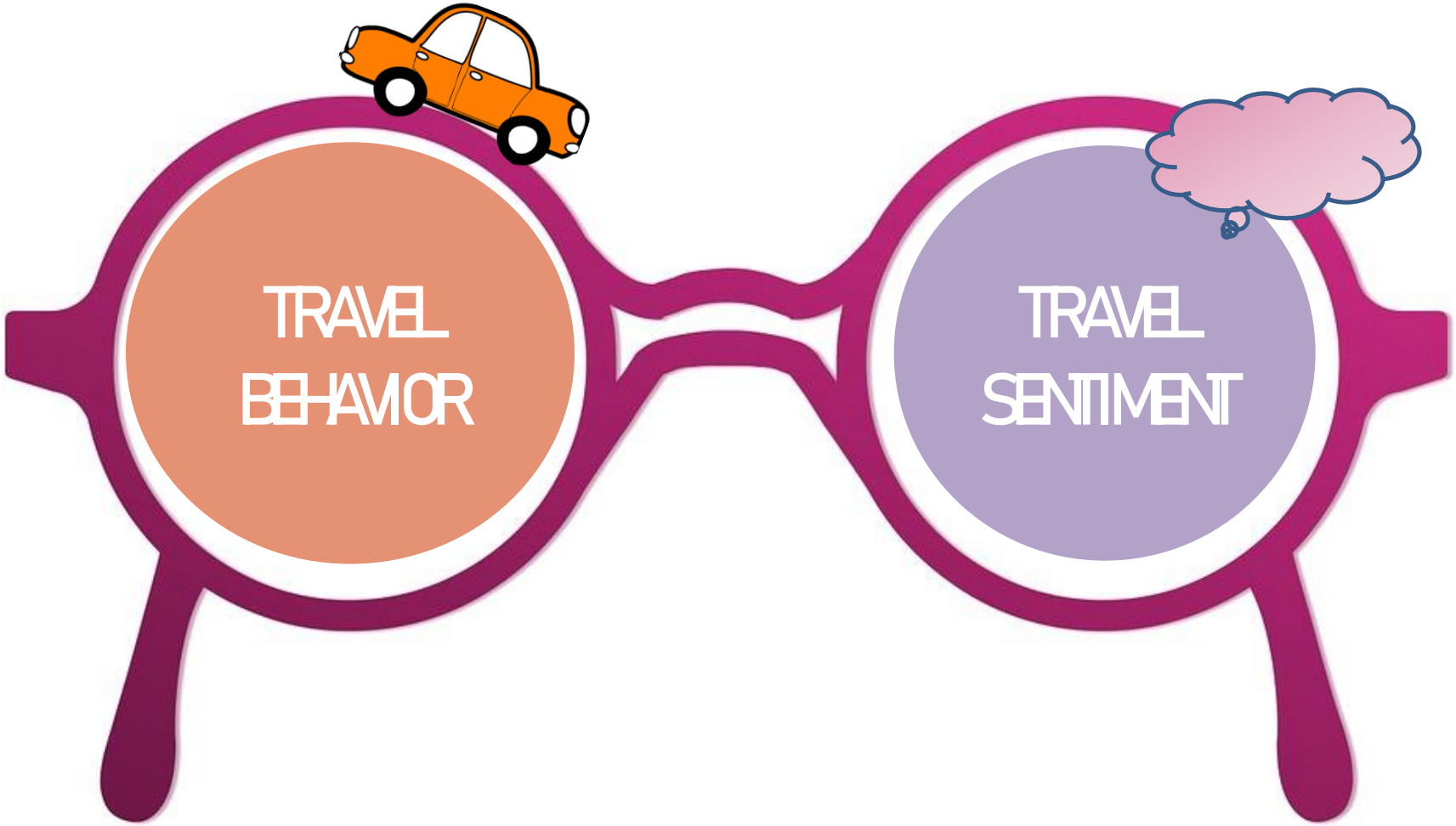
How travelers have changed, and what you need to consider to get them to your site.

INTENT TO TRAVEL

When. How. Who. Where. What. Why.


TRAVEL BEHAVIOR
TRAVEL SENTIMENT

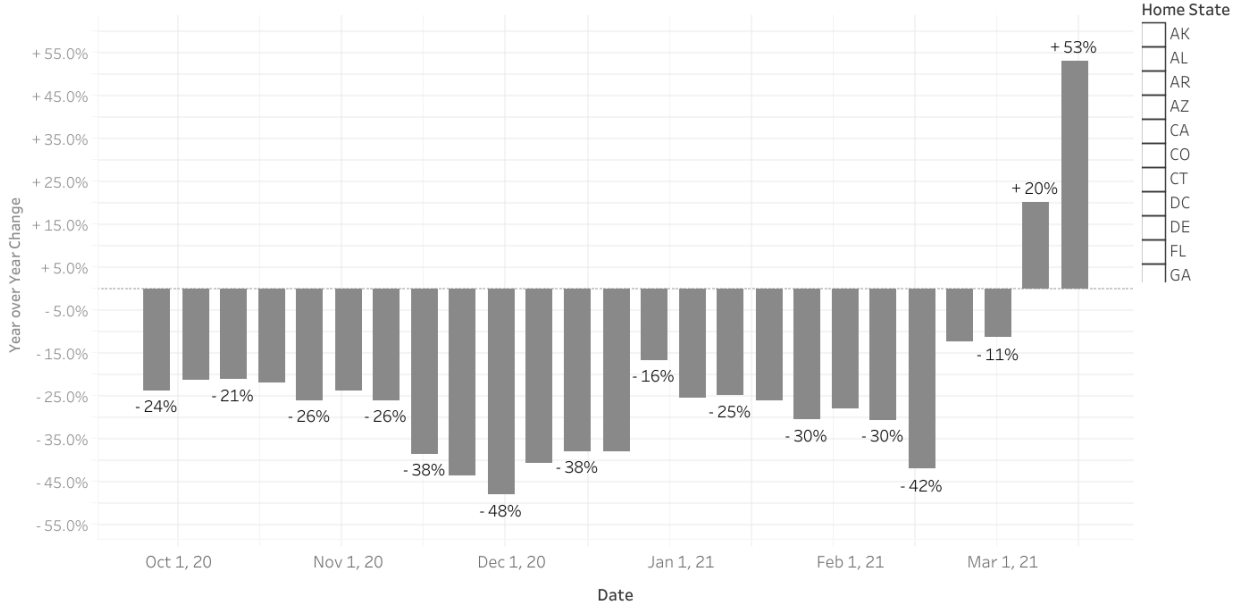
TRAVEL BEHAVIOR

Arrivalist US Year over Year Change

Daily Index YoY	Last 7 Days YoY	Last 30 Days YoY
+ 53.2%	+ 20.0%	- 16.5%
Mar 14, Sunday	Mar 08 - Mar 14	Feb 13 - Mar 14

Time Period
Year to Date

Show View
Weekly

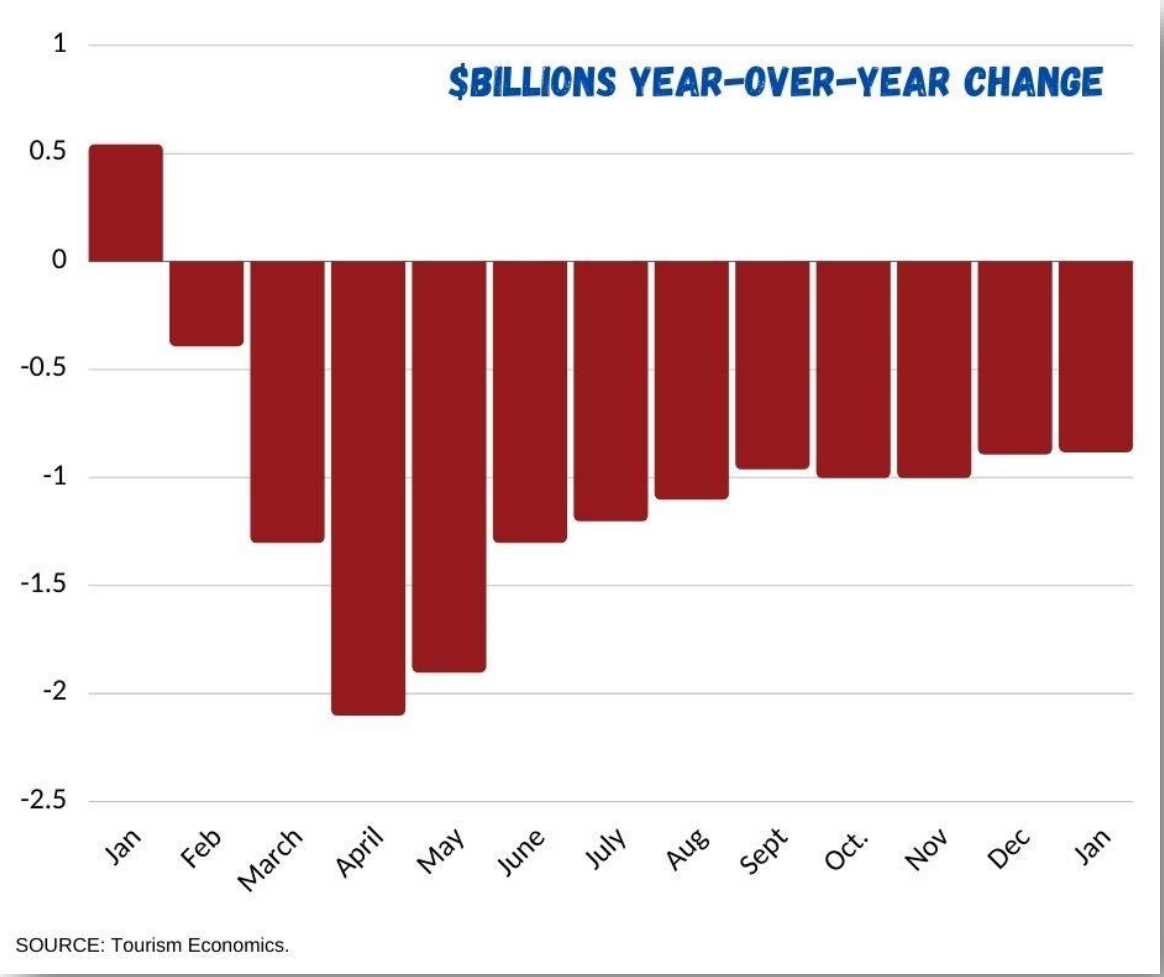


Daily drive market index of US travelers who moved **at least 50 miles from home** and spent a minimum of **2 hours** on their journey. The Year over Year is based on relative Index change to 2019.

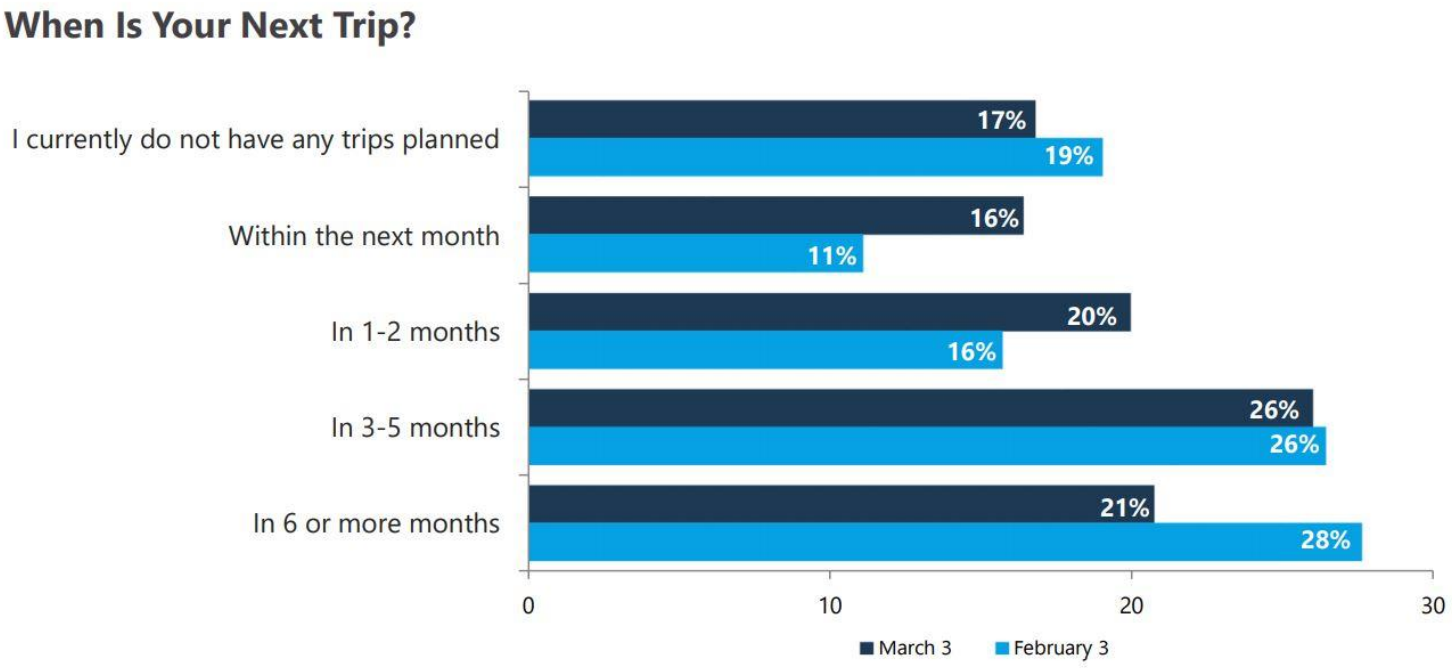
Last Updated: Mar 14, 2021

$13.6 BILLION less visitor spending

TRAVEL BEHAVIOR



WHEN are people planning to travel?



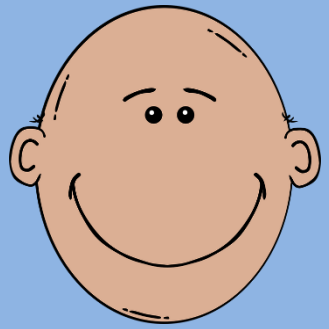
SOURCE: Longwoods International. Fielded March 3, 2021

Game Changers

1. Smooth vaccine rollout
2. Rate of infection
3. Common sense government regulations

WHEN are museum-goers going to feel comfortable?

SOURCE: Wilkening Consulting on behalf of the American Alliance of Museums.



Ready to go!

25% - US residents
26% - museum goers

Not till I'm vaccinated

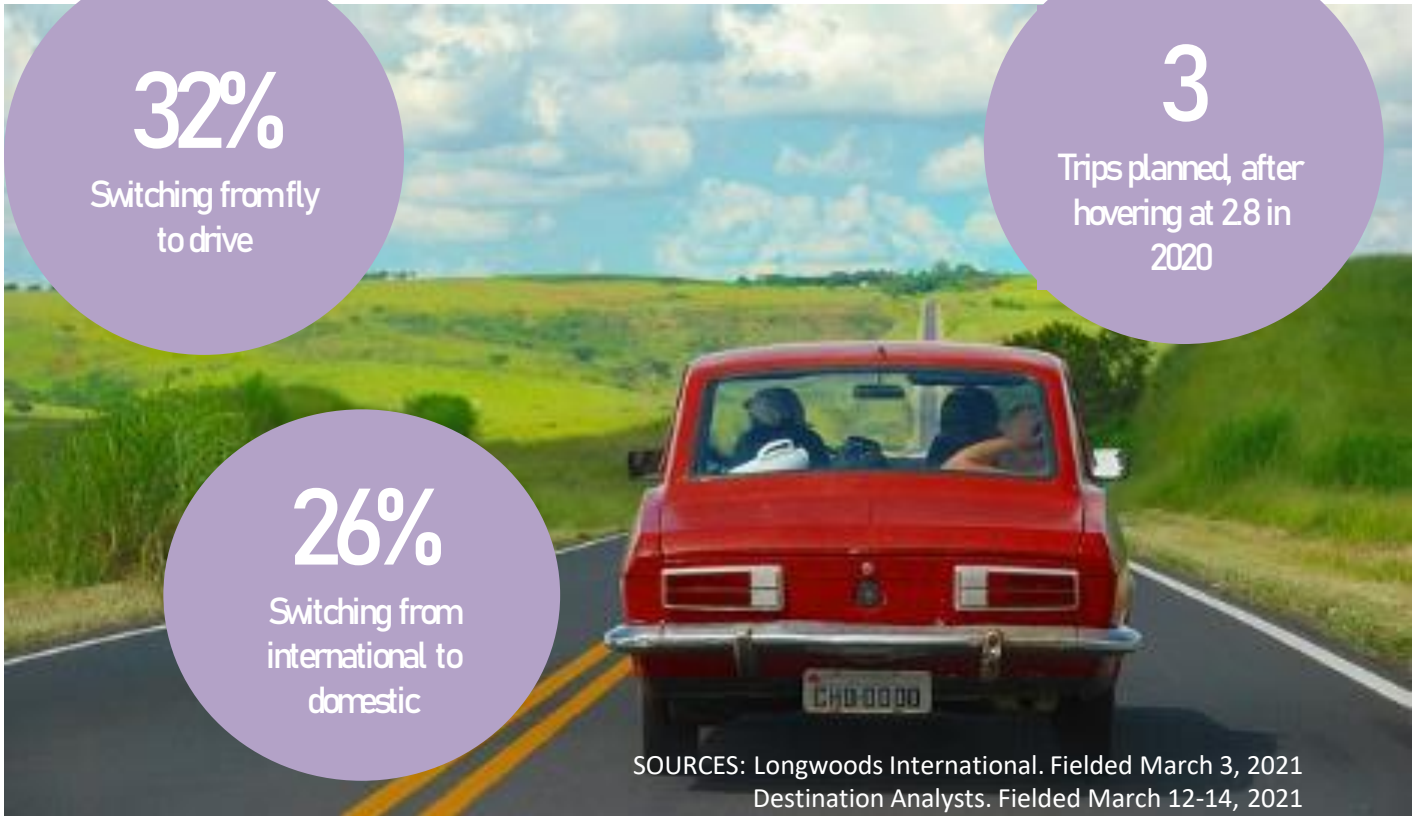
17% - US residents
33% - museum goers

Waiting for herd immunity

48% - US residents
31% - museum goers

HOW

HOW do they expect to travel?



32%
Switching from fly to drive

3
Trips planned, after hovering at 2.8 in 2020

26%
Switching from international to domestic

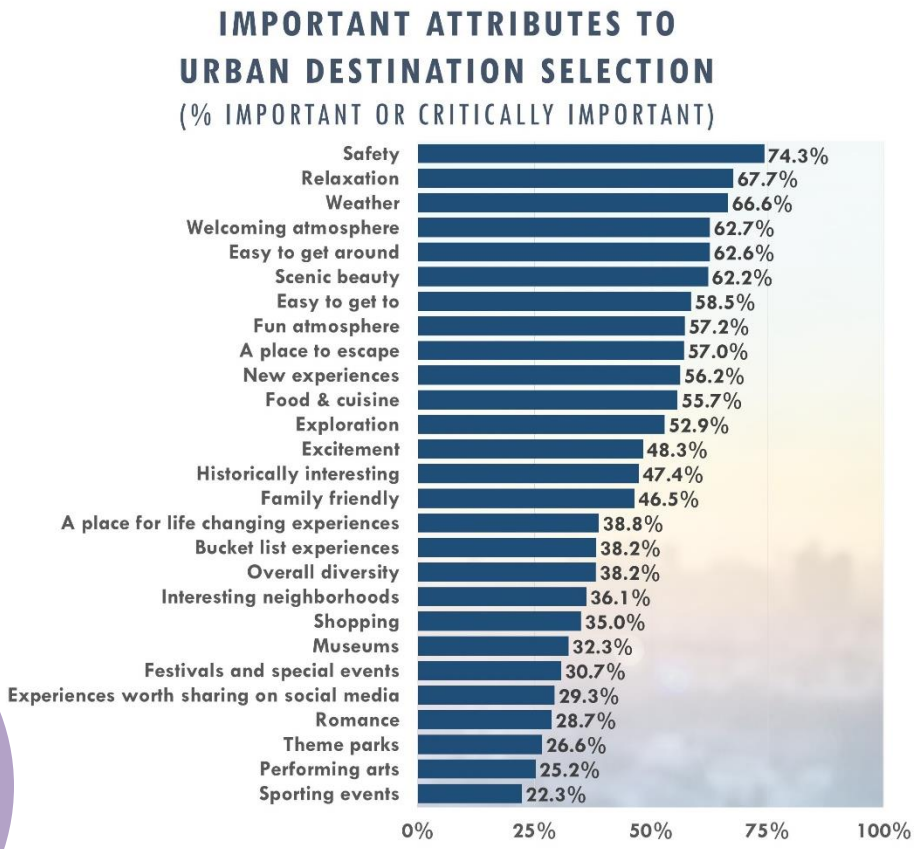
SOURCES: Longwoods International. Fielded March 3, 2021
Destination Analysts. Fielded March 12-14, 2021

WHERE

WHERE are they planning to go?

>1/3

Americans planning to travel in 3 months choosing urban



QUESTION: PLEASE THINK ABOUT WHY YOU VISIT CITIES AND URBAN AREAS. HOW IMPORTANT ARE EACH TO HOW YOU WOULD GENERALLY SELECT THE CITIES OR URBAN AREAS YOU VISIT?

(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

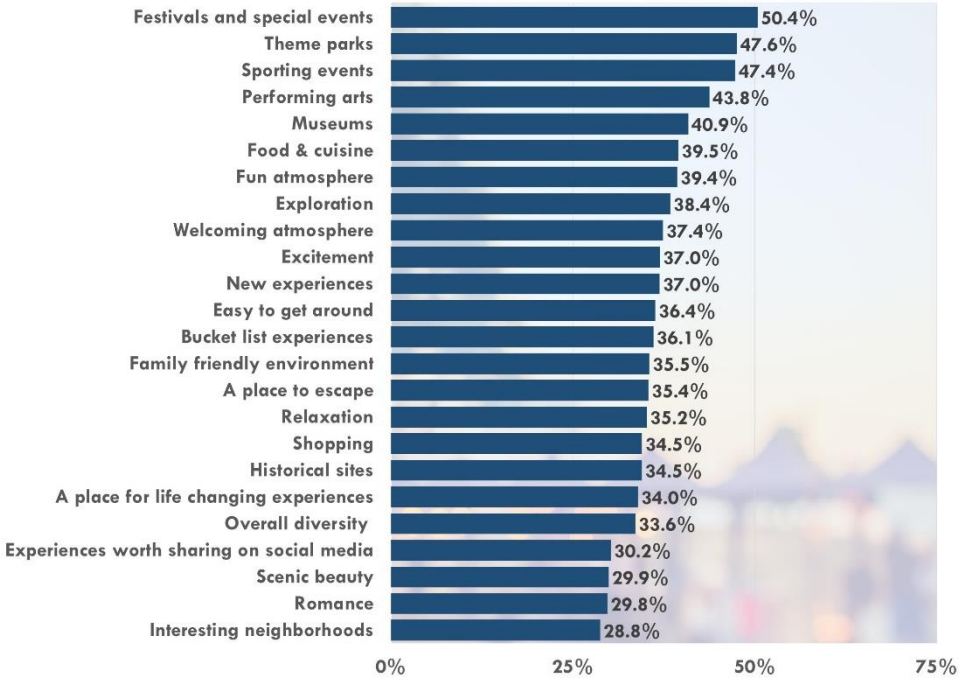
SOURCE: Destination Analysts. Fielded March 12-14, 2021

WHERE

Is this due to restrictions or because we haven't shown them safe AND fun experiences?

THE IMPACT OF THE PANDEMIC ON TRAVELERS' ABILITY TO ENJOY URBAN EXPERIENCES

(MOST IMPACTED EXPERIENCES—
% SAYING "MAKES IT IMPOSSIBLE" OR "SIGNIFICANT EFFECT")



QUESTION: IMAGINE YOU WERE PLANNING A LEISURE TRIP IN THE NEXT SIX (6) MONTHS. HOW MUCH OF AN EFFECT DO YOU FEEL THE CORONAVIRUS SITUATION WOULD HAVE ON YOUR ABILITY TO ENJOY EACH ELEMENT OF AN URBAN DESTINATION?

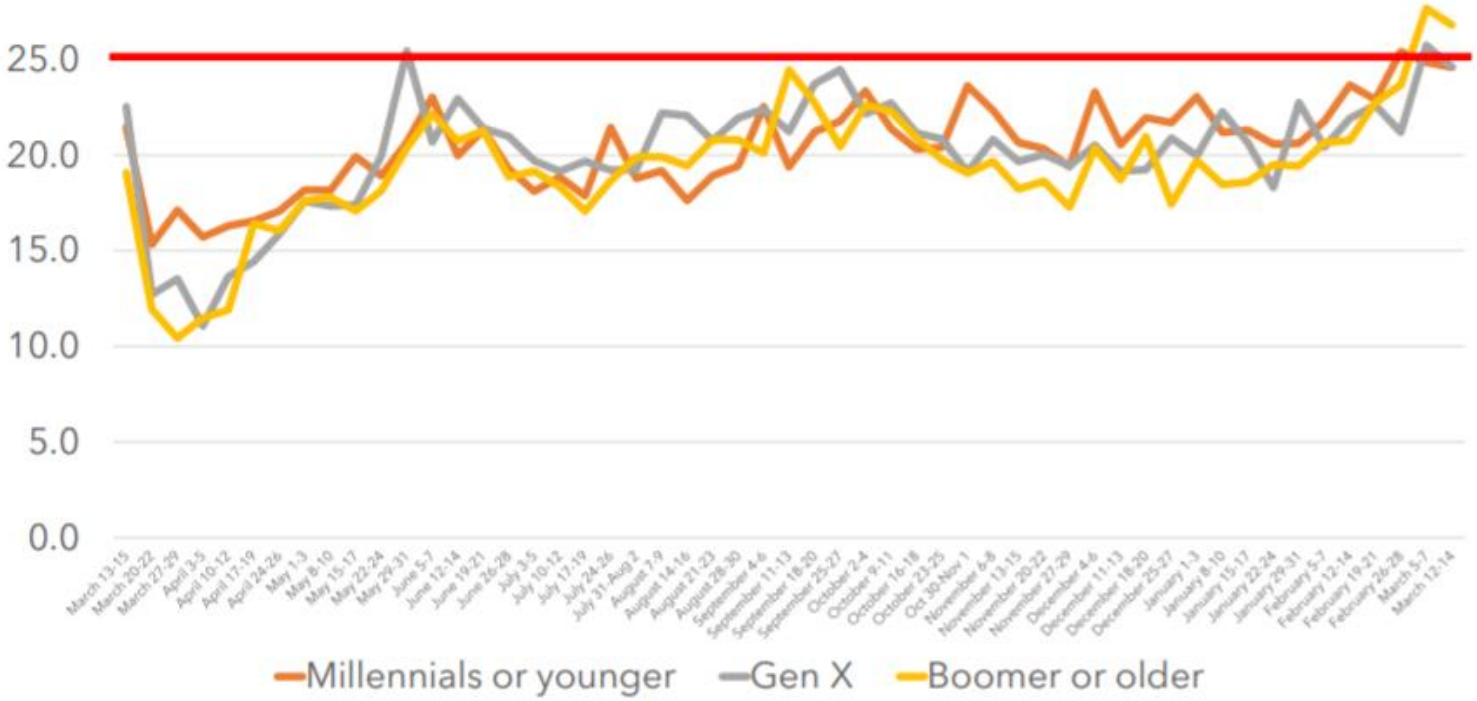
(Base: Wave 53 data. All respondents, 1,204 completed surveys. Data collected March 12-14, 2021)

SOURCE: Destination Analysts. Fielded March 12-14, 2021

WHO is more comfortable traveling?

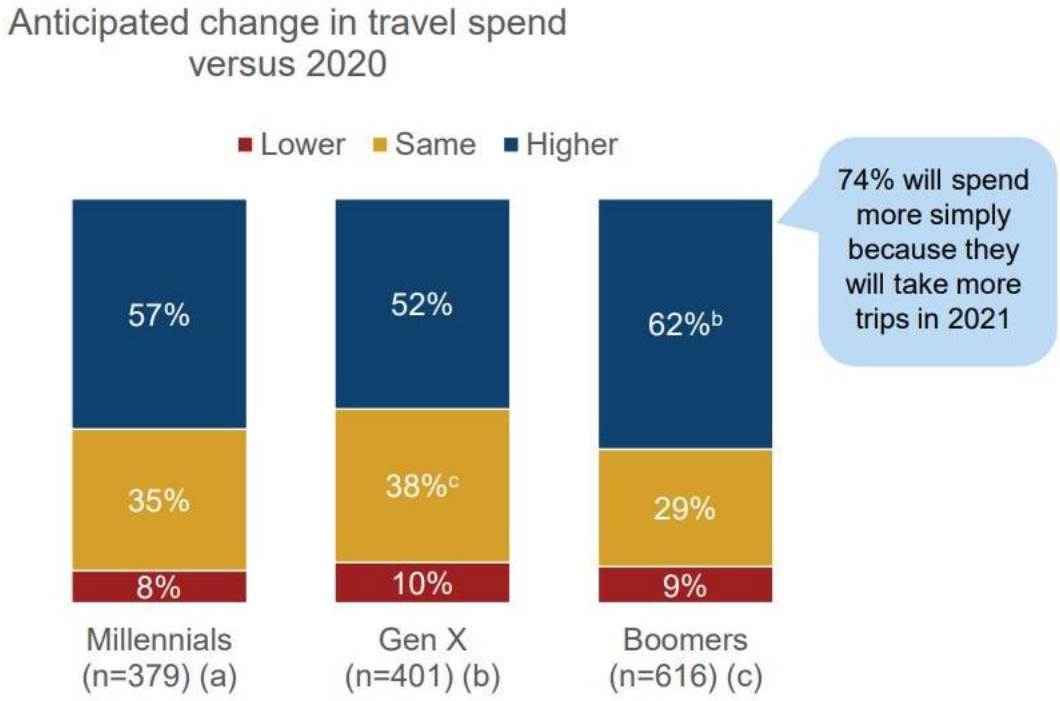
SOURCE: AARP. Fielded Nov. 19-20, 2020

WHO is more comfortable traveling?



SOURCE: Destination Analysts. Fielded March 12-14, 2021

WHO is more comfortable traveling?



SOURCE: AARP. Fielded Nov. 19-20, 2020

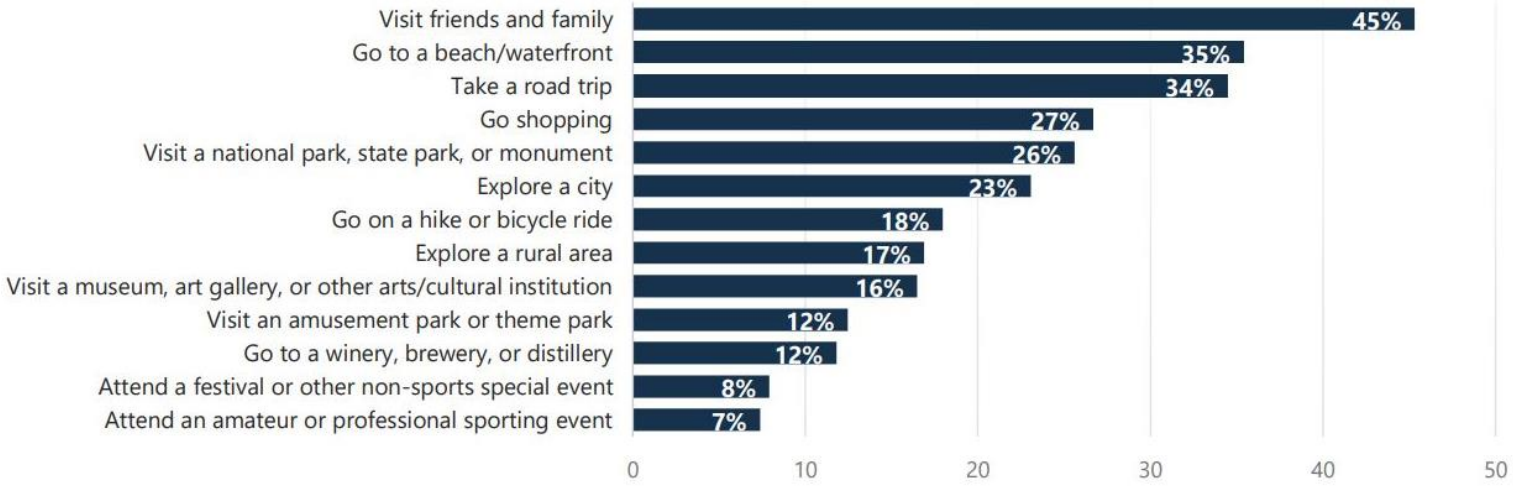
Letters denote significant differences between generations at the 95% confidence level

All that being said . . .

- Many businesses reporting > bookings from 65+ as they are vaccinated
- Multigenerational

SOURCE: AARP. Fielded Nov. 19-20, 2020

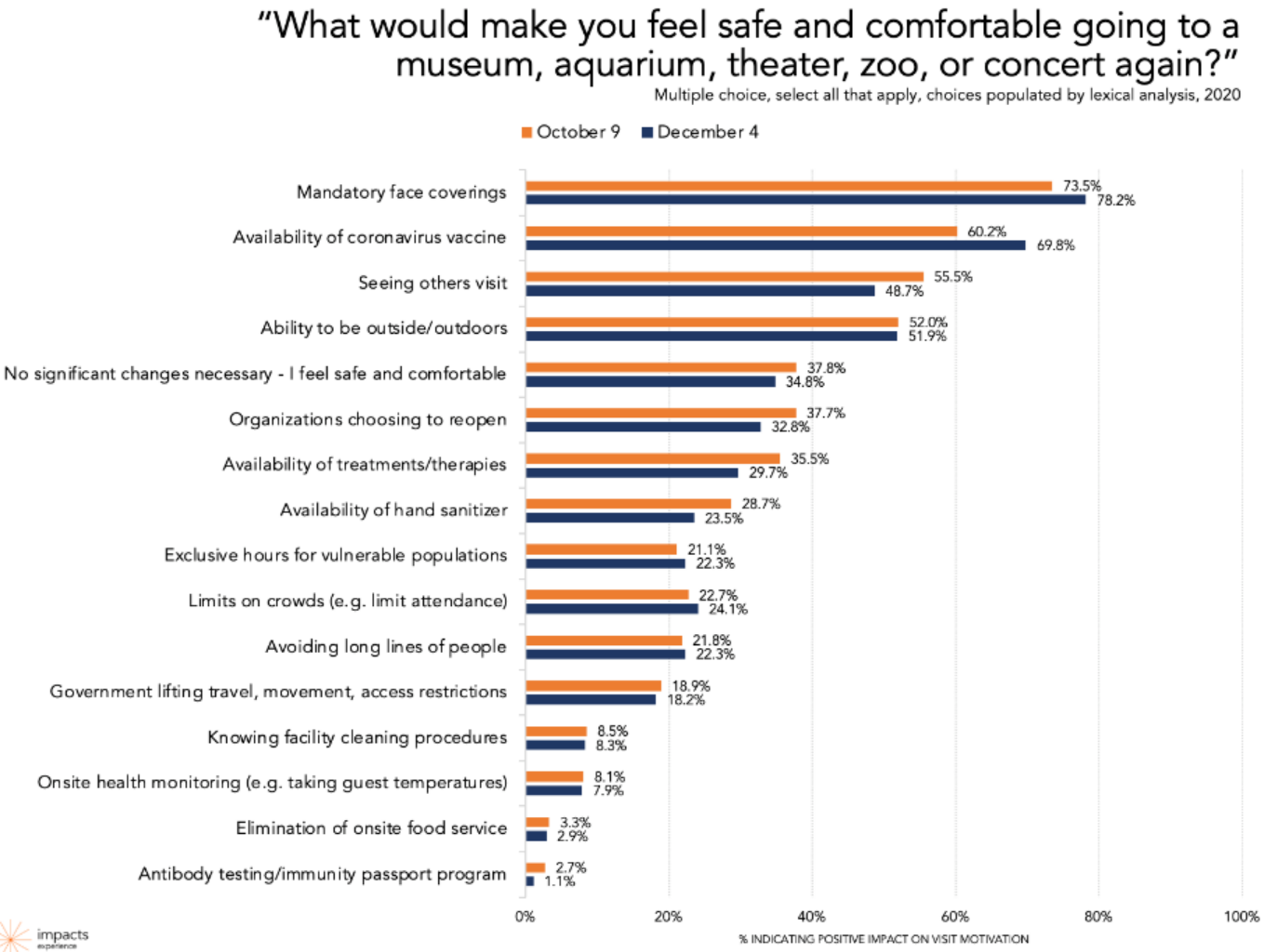
WHAT are they looking to do?



SOURCE: Longwoods International. Fielded March 3, 2021

WHAT

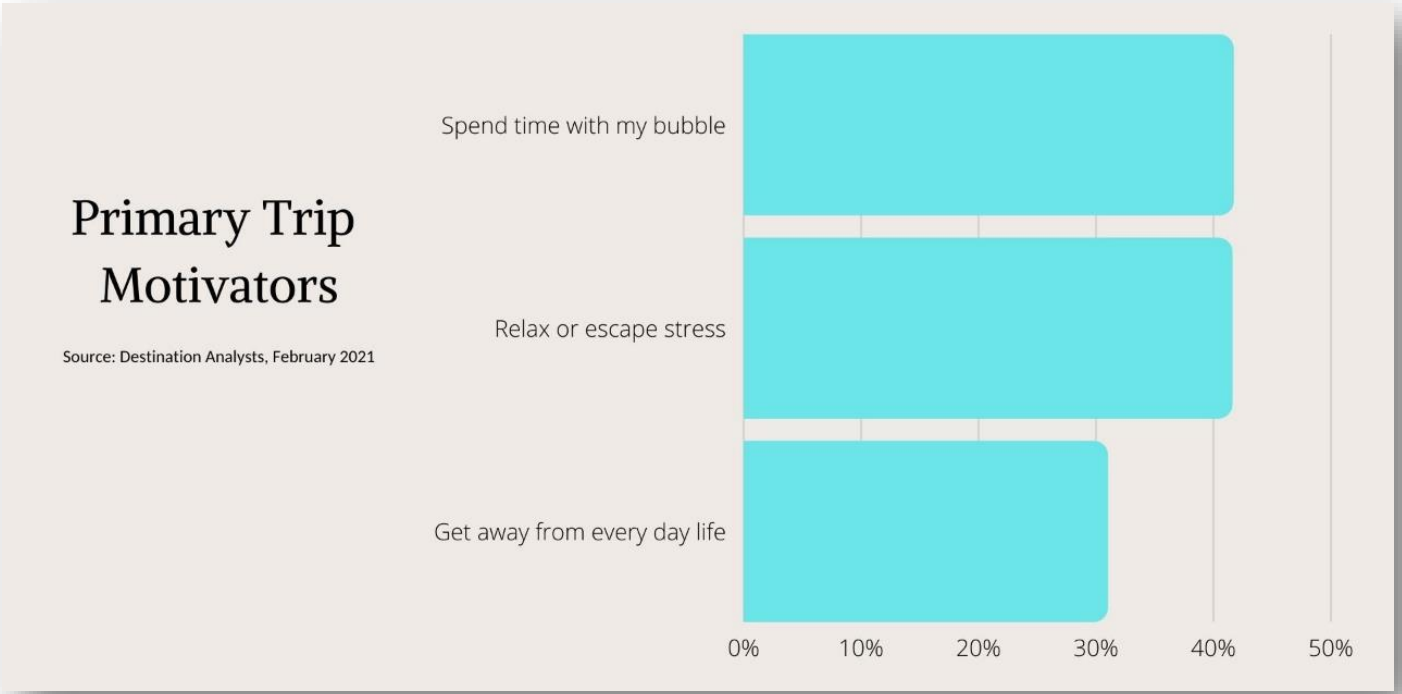
WHAT would make them comfortable?



SOURCE: Impacts Research.
Fielded December 2020.

impacts experience

And most important when considering messaging, **WHY**?



CUSTOMER SATISFACTION

A shift in how our guests are defining customer service.

And it ain’t pretty.

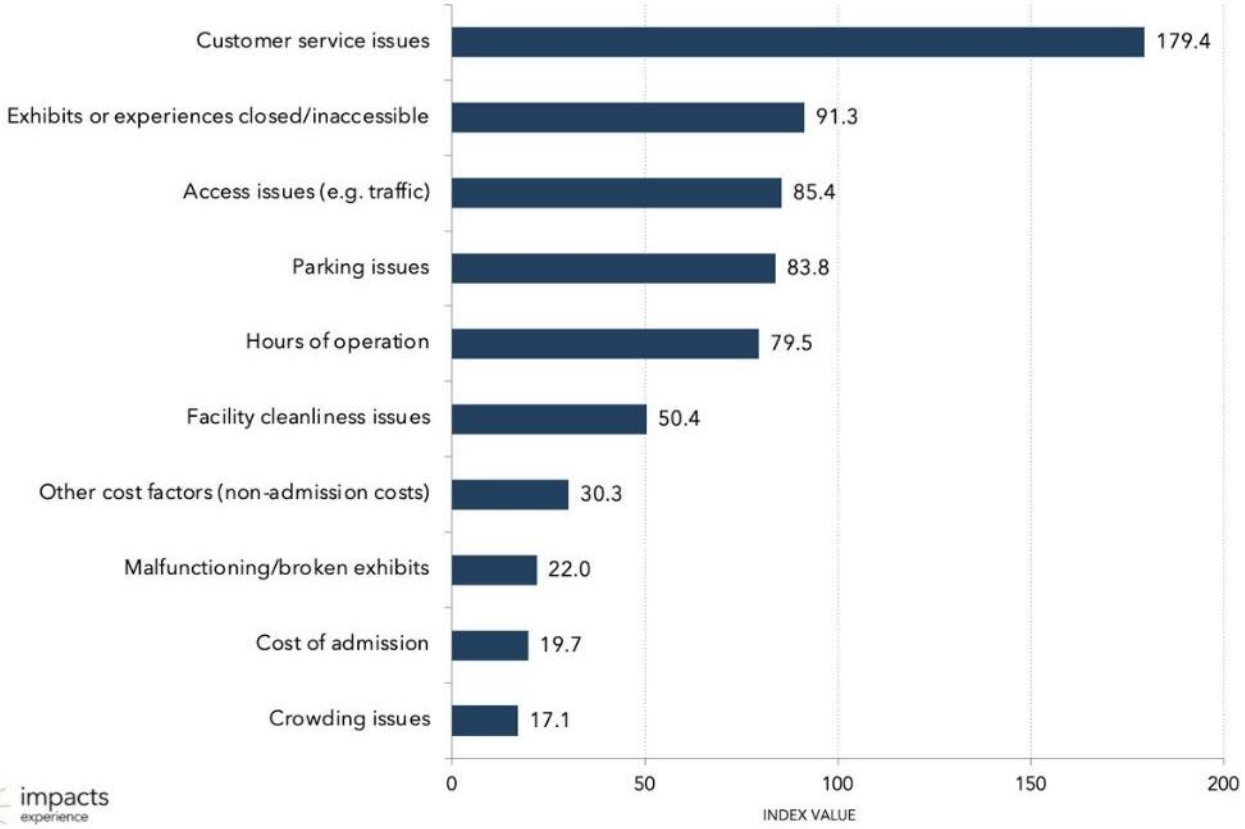
TRAVEL BEHAVIOR

Customer Dissatisfaction has increased

17%

Visitor Dissatisfiers

"What factors contributed to your less-than-satisfying experience when you last visited …?"
(Adult visitors to US visitor-serving organizations within the past six months as of 1 January 2021)



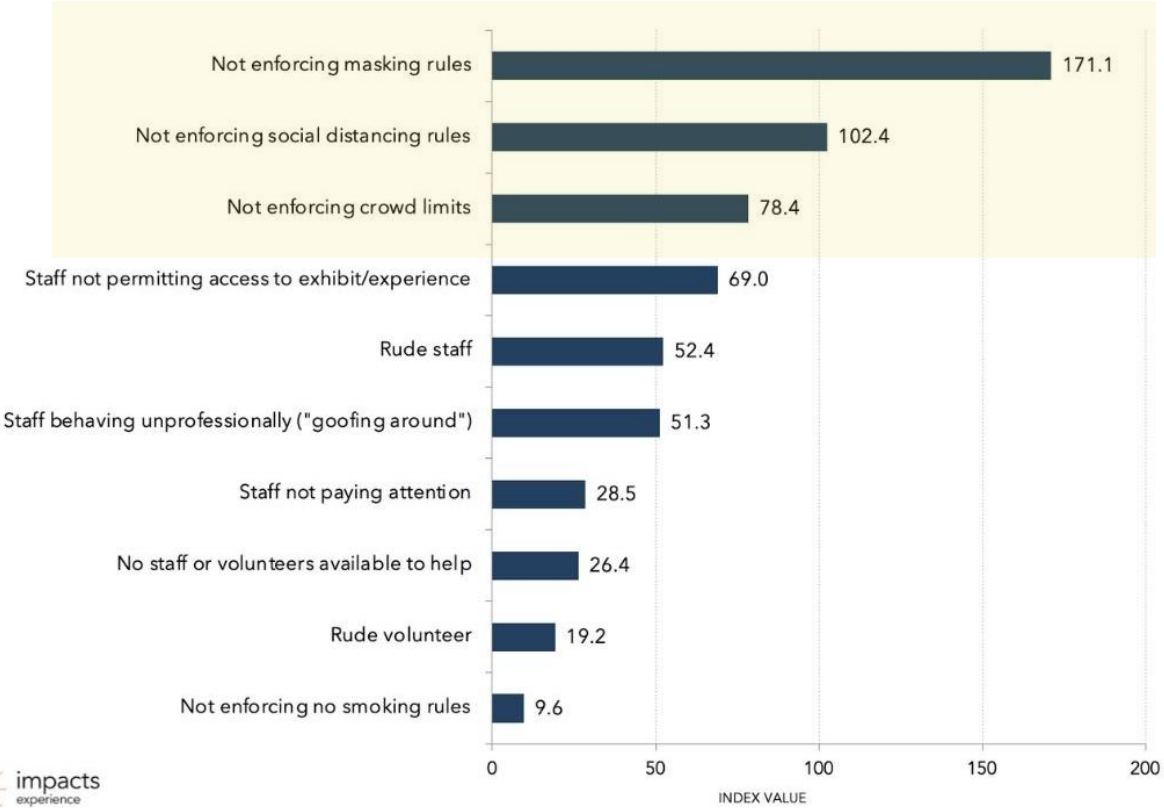
impacts experience

TRAVEL BEHAVIOR

Not enforcing safety protocols is the reason!

Visitor Dissatisfiers: Customer Service Issues

"How would you describe the customer services issues that contributed to your less-than-satisfying experience when you last visited …?"
(Adult visitors to US visitor-serving organizations within the past six months as of 1 January 2021)



impacts experience

TRAVEL BEHAVIOR

Visitor Perceptions of Staff and Volunteers Roles

(Adult visitors to US visitor-serving organizations within the past six months as of 1 January 2021)

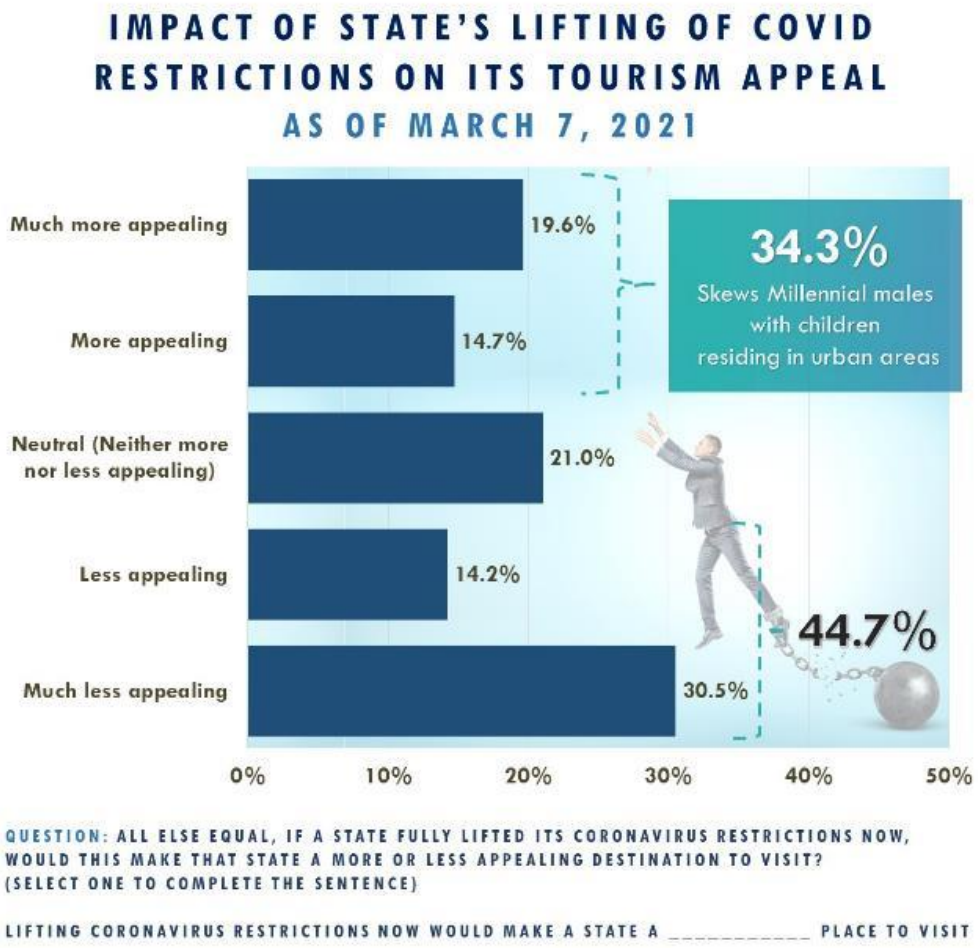
"In terms of how staff and volunteers relate to guests and visitors, what do you perceive should be the primary role of the staff and volunteers when you made your most recent visit to the [ORGANIZATION]?

(multiple choice, select the answer that best applies)

Primary role	Description	Primary role %
Safety of visitors	Managing crowd capacities, ensuring mask compliance, enforcing social distancing	73.2%
Greeting and wayfinding	Welcoming visitors, helping direct visitors, providing basic information	19.7%
Interpretation and demonstration	Sharing information, explaining exhibits, supporting "hands on" experiences	7.0%

impacts experience

We need to keep an eye on this



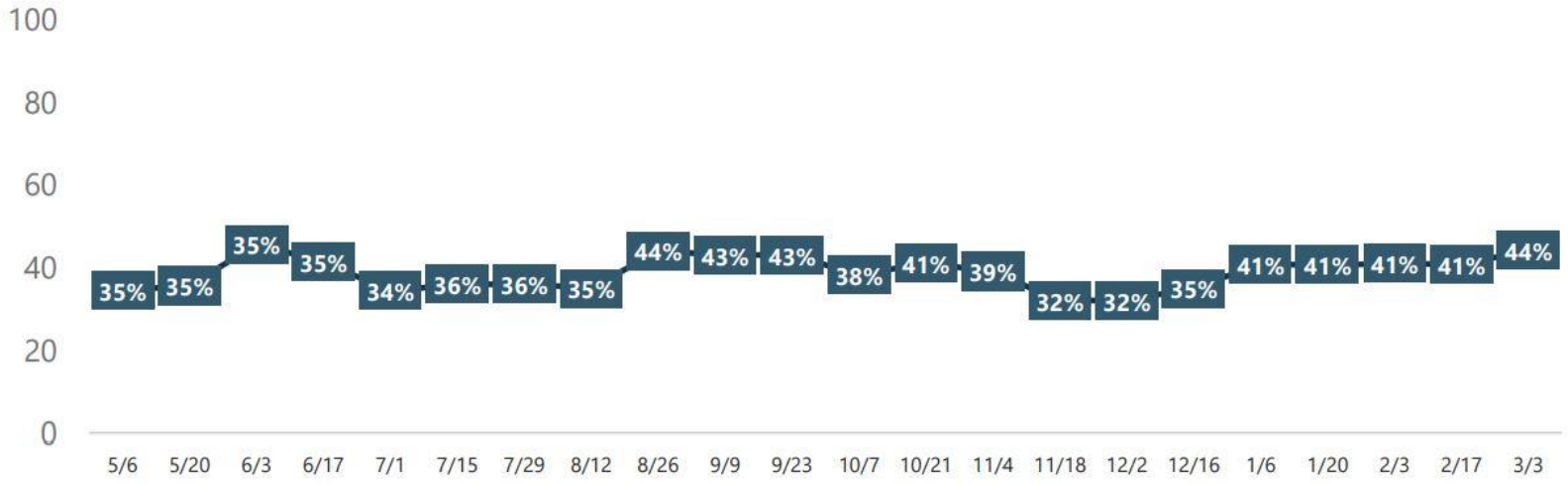
SOURCE: Destination Analysts. Fielded March 5-7, 2021

COMMUNITY READINESS

You may be ready to welcome guests. Are your neighbors?

I Support Opening Up My Community to Visitors

Comparison of Travelers Who Strongly Agree or Agree



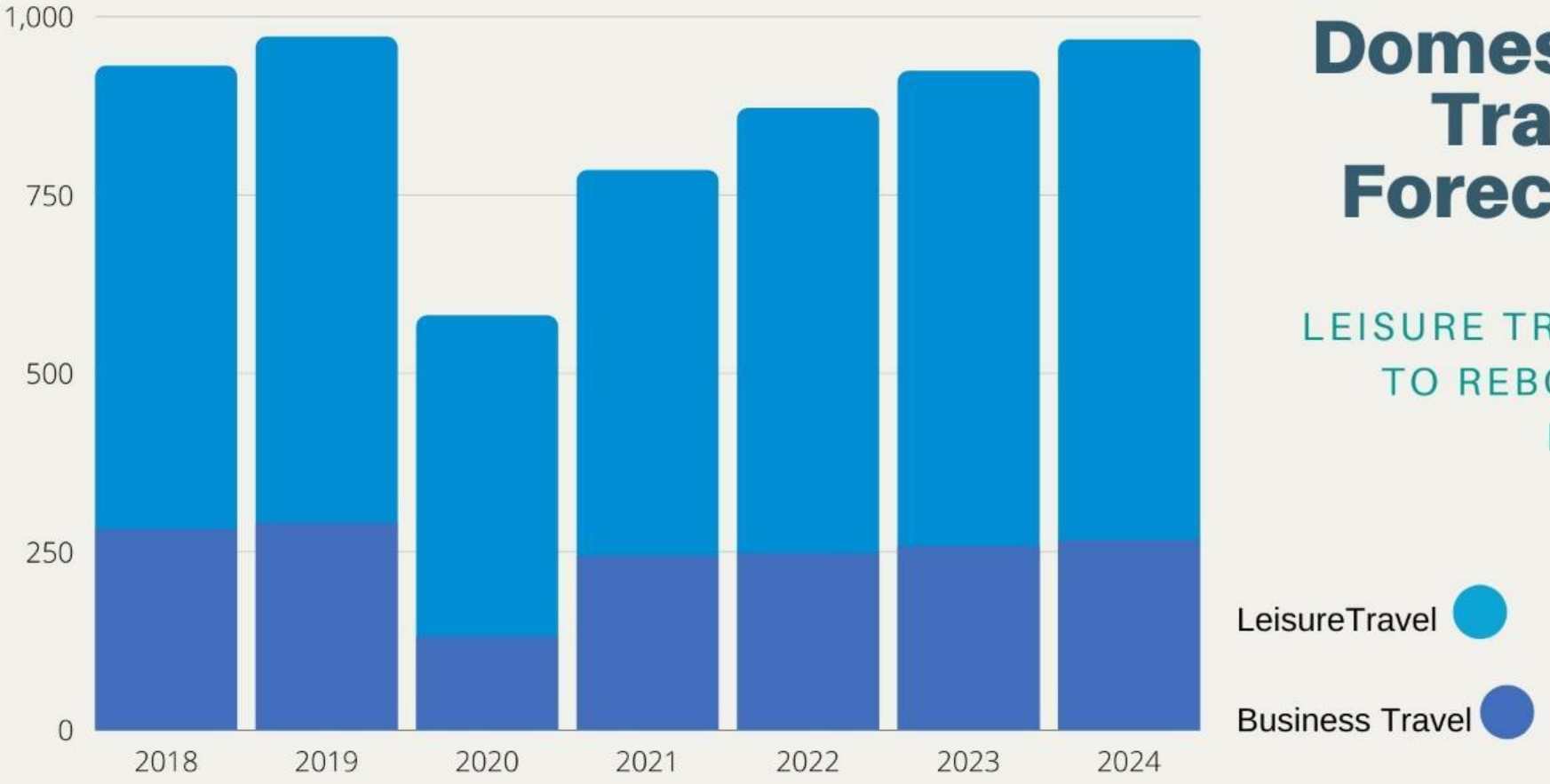
SOURCE: Longwoods International. Fielded March 3, 2021

FORECAST

What to expect. How to accelerate recovery.

Domestic Travel Forecast

LEISURE TRAVEL TO REBOUND FIRST



Roadtrip travel

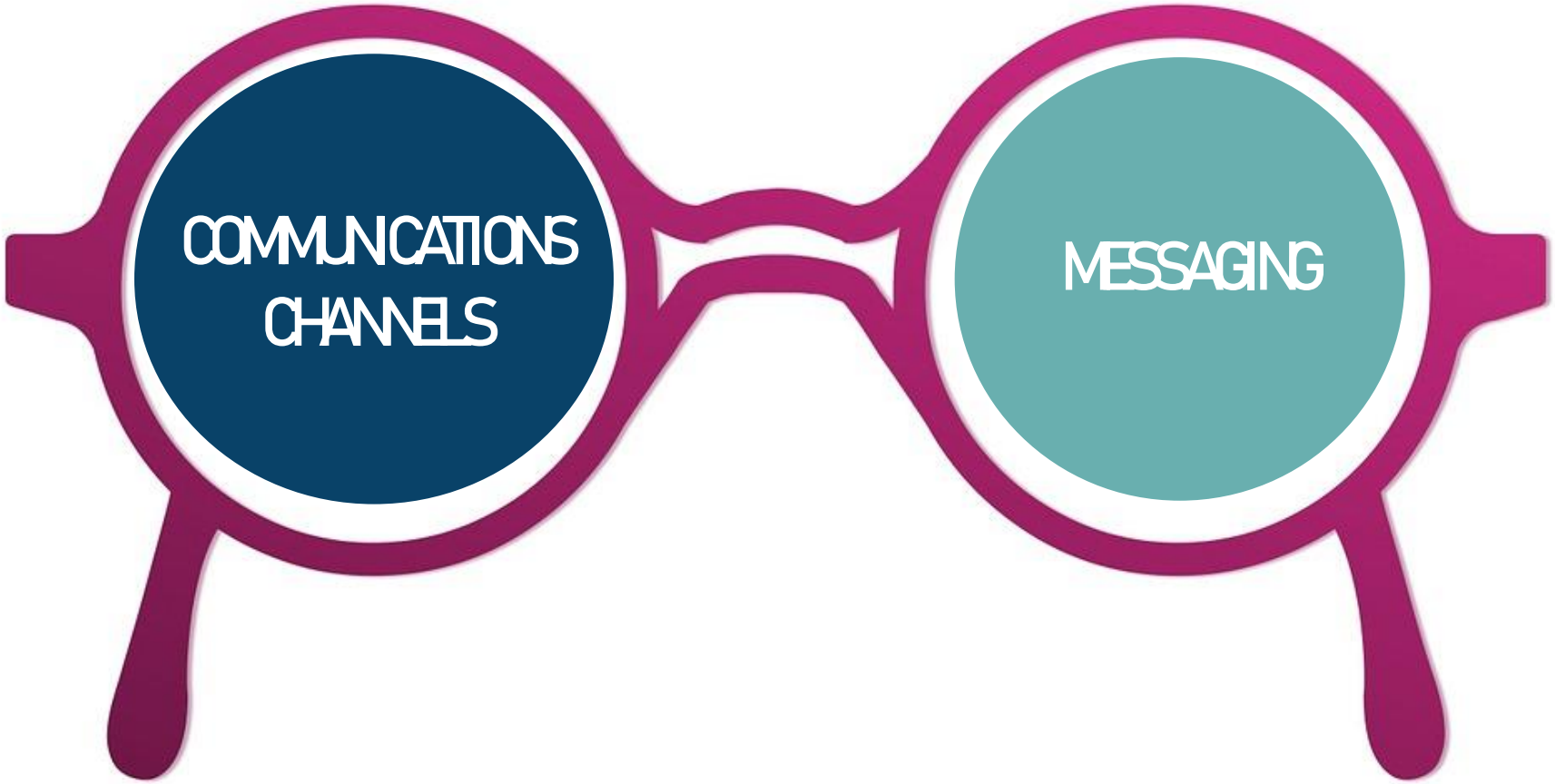
Domestic travel

Growth in private family or “bubble” tours, trend toward smaller group tours continues

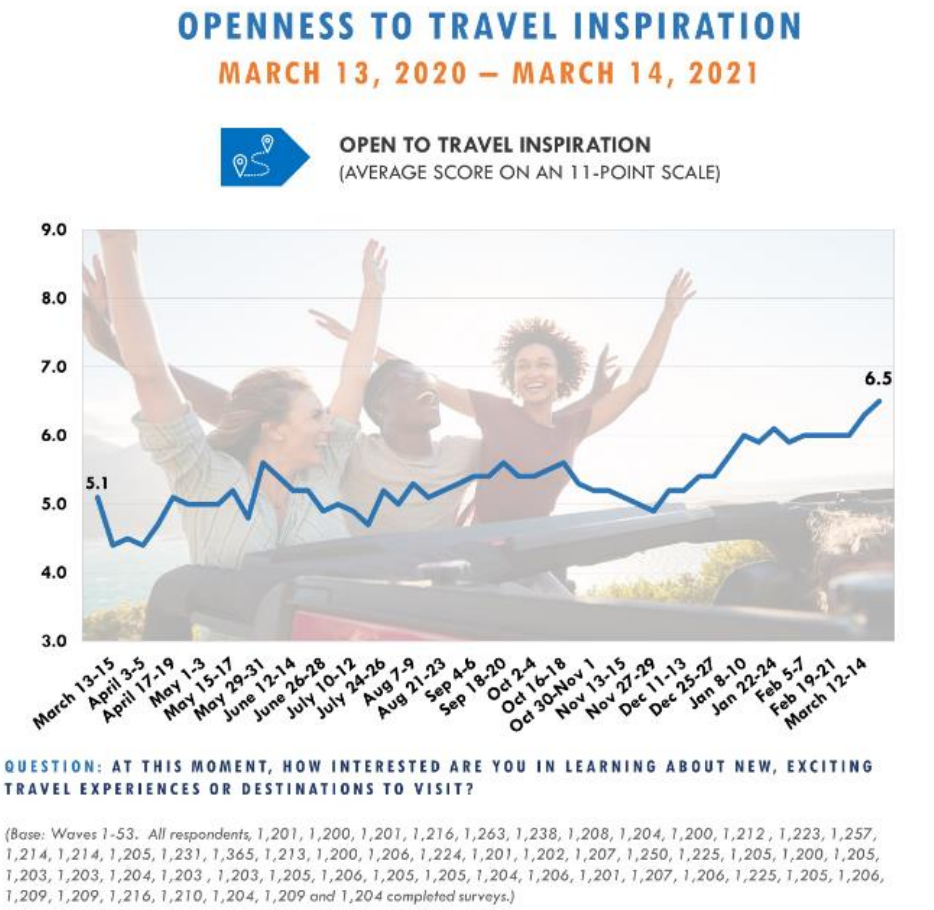
Outdoor recreation and spaces

Niche travel

Safety messaging <u>and</u> enforcement will continue to be important

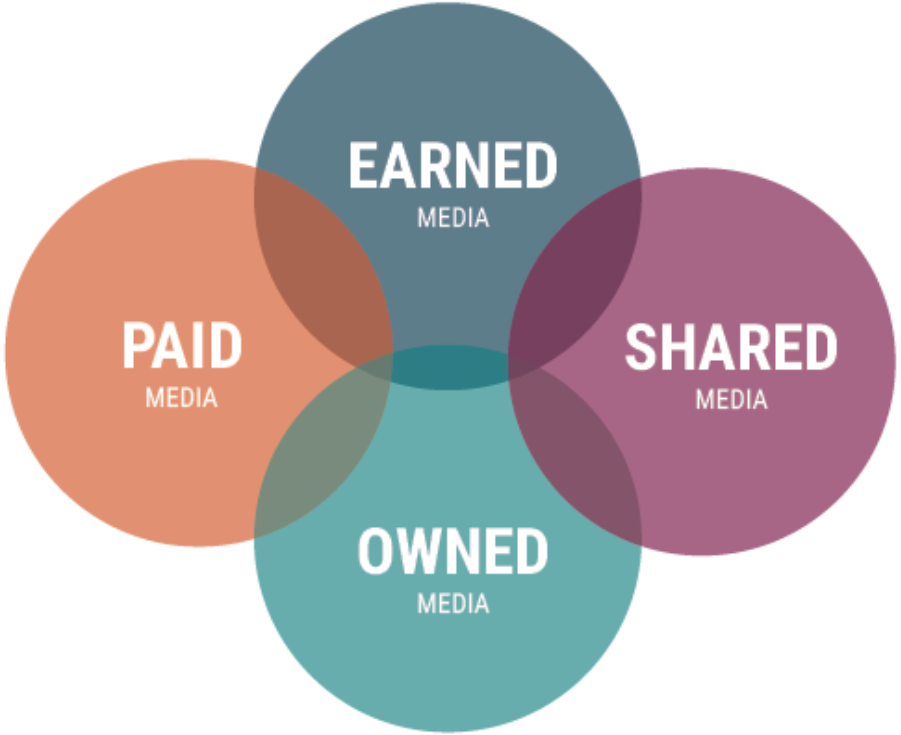

COMMUNICATIONS CHANNELS
MESSAGING

Interest in learning about destinations and experiences is growing



Channels

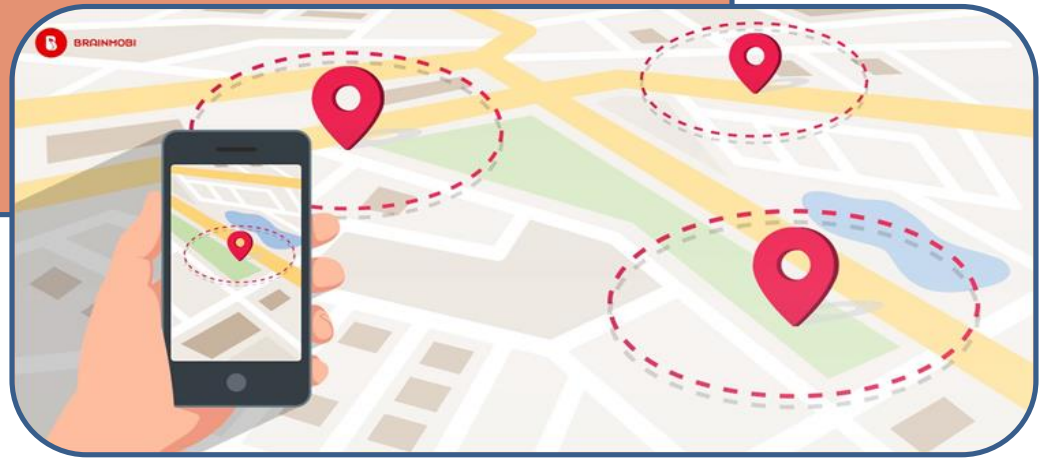
- Website
- Social Media
- eMarketing
- Media
- Print
- Advertising



PAID

GEOFENCING Advertising

Geofencing is a virtual geographical boundary to target display ads on mobile devices to your customer.



EARNED

MEDIA

Pitch your media partners on your opening plans and the ways your guests will feel safe.

- Share the ways your guests will feel safe.
- Be open and honest if certain exhibits or spaces are closed.
- Share how your guests can help your museum feel safe for everyone.
- Influencers

SHARED

SHARED or SOCIAL MEDIA

Use storytelling and imagery to welcome guests back.

- Imagery is used best when it fits your mission and brand.
- Use your objects and exhibits to tie back to safety and experience
- Landing page

OWNED

- Website
- E-marketing
- Print
- In-Person
- Zoom

OWNED

Website
E-marketing
Video

- Tell guests what to expect and how to prepare.

OWNED

Website

- Tell guests what to expect and how to prepare.

OWNED

Family Field Trip Days, Ohio History Center

Enhance this year's learning by safely visiting the Ohio History Center during our Family Field Trip Days! Beginning September 23 on select dates, you can discover Ohio's natural history, archaeology, military history and more with our museum experts! Take part in fun and educational activities featuring real collections, trivia and special story times, and learn about what makes Ohio great.

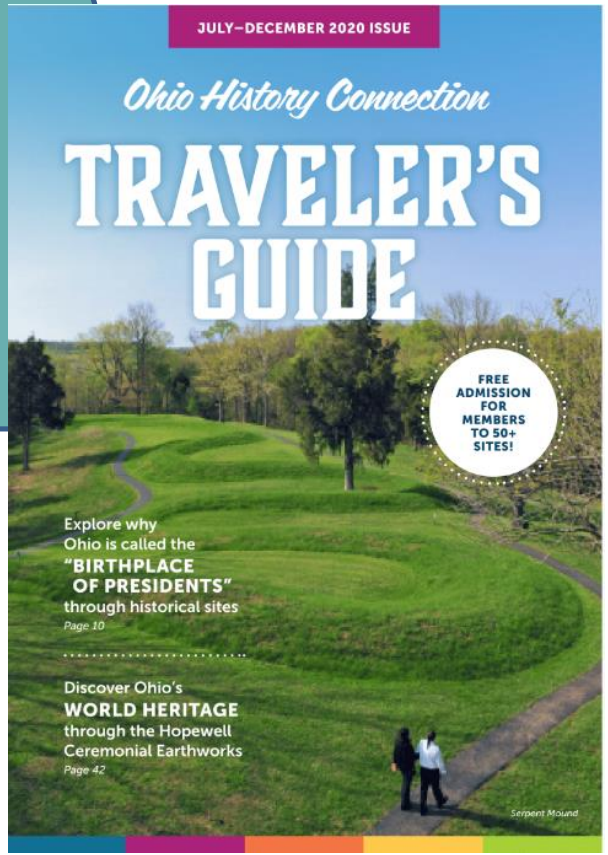
These experiences have been developed for students of all ages, so your whole family will enjoy. With a timed ticket, you'll get one hour of exploration time to visit our activity stations.

Entry is free for members, $5/Child, $7/Adults. Learn about our safety protocols and reserve your tickets below.

Register here

Print

- Get your print materials to the places where the people are already.



OWNED

OHIO HISTORY CONNECTION

In-Person

- Use visuals as soon as they enter and throughout the property.

MESSAGING

- Consistent and supportive throughout all channels
- Take the customer’s perspective
  - Safety
  - Tailor message to audience preferences and to what is authentic to your experience
  - Encourage personal responsibility

Phase 1

Keep in touch

Phase 2

Generate business

Phase 3

Expand business

Follow museum directions.

Wear your mask securely over your nose.

Stay with your group.

Use hand sanitizer stations.

WORKING TOGETHER

to protect the health of employees, visitors and their families

Coronavirus (COVID-19) is an illness caused by a virus that can spread from person to person. Learn ways you can protect yourself and others from COVID-19.

FACE COVERINGS

ALL EMPLOYEES ARE REQUIRED AND RECOMMEND FOR VISITORS AT ALL TIMES

GOOD HYGIENE

CLEAN HANDS WITH SOAP AND WATER FOR AT LEAST 20 SECONDS OR AN ALCOHOL-BASED HAND SANITIZER

PRACTICE SOCIAL DISTANCING

AVOID LARGE CROWDS, MAINTAIN AT LEAST SIX FEET FROM OTHERS AND TAKE EVERY EFFORT TO DISTANCE YOURSELF WHENEVER POSSIBLE

OHIO HISTORY CONNECTION

PRACTICE SOCIAL DISTANCING

PLEASE WAIT HERE

THANK YOU

OHIO HISTORY CONNECTION

FACE MASKS ARE REQUIRED.

OHIO HISTORY CONNECTION

PRACTICE GOOD HYGIENE

20 sec.

CLEAN HANDS WITH SOAP AND WATER FOR AT LEAST 20 SECONDS OR AN ALCOHOL-BASED HAND SANITIZER

OHIO HISTORY CONNECTION

Example Communication Plan

Action	People	Date	Notes
Pre-planning	Mkt/Visitor Experience		Determine the experience and decide messaging.
Create FAQ	MKT		Document to use among staff to speak consistently with stakeholders and the public. Details what the offerings will be and what to expect in terms of programming and safety.
Stakeholder Communications	MKT/Volunteer Program, HR, Membership and Development		Schedule stakeholder communications in sequence of importance: staff, volunteers, donors and members. Be available and responsive to questions and comments. Communications can be via email, phone, video our town hall meetings.
Develop promotion messaging visuals for web, social, email print and onsite	MKT		Messaging will be consistent with and build on stakeholder messaging. Include visuals and use consistently throughout all channels with the exception of social media.
Pitch Media	MKT/Visitor Experience		How will the experience change and why? What can guests expect? Share what's fun, interesting or different.
Re-evaluate	MKT/Visitor Experience		Measure your results with customer feedback. Short online surveys can give you a snapshot of your success.
Make a back-up plan	MKT/Visitor Experience		Develop messaging in case you need to close. Be honest and ask for your guests' support. Commit to communicate and follow through.

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Ohio Travel ASSOCIATION

OHIO HISTORY CONNECTION

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