How travelers have changed, and what you need to consider to get them to your site.
INTENT TO TRAVEL
Arrivalist US Year over Year Change

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Show View</th>
<th>Daily Index YoY</th>
<th>Last 7 Days YoY</th>
<th>Last 30 Days YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year to Date</td>
<td>Weekly</td>
<td>+53.2%</td>
<td>+20.0%</td>
<td>-16.5%</td>
</tr>
<tr>
<td>Mar 14, Sunday</td>
<td>Mar 06 - Mar 14</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb 13 - Mar 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
When are people planning to travel?

When Is Your Next Trip?

- I currently do not have any trips planned: 17% (March 3), 19% (February 3)
- Within the next month: 11% (March 3), 16% (February 3)
- In 1-2 months: 16% (March 3), 20% (February 3)
- In 3-5 months: 26% (March 3), 26% (February 3)
- In 6 or more months: 21% (March 3), 28% (February 3)

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?

**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

SOURCE: Wilkening Consulting on behalf of the American Alliance of Museums.
How do they expect to travel?

32% Switching from fly to drive

26% Switching from international to domestic

3 Trips planned, after hovering at 2.8 in 2020

Sources: Longwoods International. Fielded March 3, 2021
Destination Analysts. Fielded March 12-14, 2021
WHERE are they planning to go?

>1/3 Americans planning to travel in 3 months choosing urban

**WHERE**

SOURCE: Destination Analysts. Fielded March 12-14, 2021
Is this due to restrictions or because we haven’t shown them safe AND fun experiences?

**WHERE**

**THE IMPACT OF THE PANDEMIC ON TRAVELERS’ ABILITY TO ENJOY URBAN EXPERIENCES**

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

<table>
<thead>
<tr>
<th>Experience</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festivals and special events</td>
<td>50.4%</td>
</tr>
<tr>
<td>Theme parks</td>
<td>47.6%</td>
</tr>
<tr>
<td>Sporting events</td>
<td>47.4%</td>
</tr>
<tr>
<td>Performing arts</td>
<td>43.8%</td>
</tr>
<tr>
<td>Museums</td>
<td>40.9%</td>
</tr>
<tr>
<td>Food &amp; cuisine</td>
<td>39.5%</td>
</tr>
<tr>
<td>Fun atmosphere</td>
<td>39.4%</td>
</tr>
<tr>
<td>Exploration</td>
<td>38.4%</td>
</tr>
<tr>
<td>Welcoming atmosphere</td>
<td>37.4%</td>
</tr>
<tr>
<td>Excitement</td>
<td>37.0%</td>
</tr>
<tr>
<td>New experiences</td>
<td>37.0%</td>
</tr>
<tr>
<td>Easy to get around</td>
<td>36.4%</td>
</tr>
<tr>
<td>Bucket list experiences</td>
<td>36.1%</td>
</tr>
<tr>
<td>Family friendly environment</td>
<td>35.5%</td>
</tr>
<tr>
<td>A place to escape</td>
<td>35.4%</td>
</tr>
<tr>
<td>Relaxation</td>
<td>35.2%</td>
</tr>
<tr>
<td>Shopping</td>
<td>34.5%</td>
</tr>
<tr>
<td>Historical sites</td>
<td>34.5%</td>
</tr>
<tr>
<td>A place for life changing experiences</td>
<td>34.0%</td>
</tr>
<tr>
<td>Overall diversity</td>
<td>33.6%</td>
</tr>
<tr>
<td>Experiences worth sharing on social media</td>
<td>30.2%</td>
</tr>
<tr>
<td>Scenic beauty</td>
<td>29.9%</td>
</tr>
<tr>
<td>Romance</td>
<td>29.8%</td>
</tr>
<tr>
<td>Interesting neighborhoods</td>
<td>28.8%</td>
</tr>
</tbody>
</table>

**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)
WHO is more comfortable traveling?

Percent who anticipate traveling in 2021

- Millennials (n=382) (a) 59%
- Gen X (n=403) (b) 61%
- Boomers (n=408) (c) 54%

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?

Anticipated change in travel spend versus 2020

<table>
<thead>
<tr>
<th>Generation</th>
<th>Lower</th>
<th>Same</th>
<th>Higher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>35%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td>38%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Boomers</td>
<td>29%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

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

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

74% will spend more simply because they will take more trips in 2021.
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?

**Activities Travelers Planning to Do on Next Leisure Trip**

- Visit friends and family: 45%
- Go to a beach/waterfront: 35%
- Take a road trip: 34%
- Go shopping: 27%
- Visit a national park, state park, or monument: 26%
- Explore a city: 23%
- Go on a hike or bicycle ride: 18%
- Explore a rural area: 17%
- Visit a museum, art gallery, or other arts/cultural institution: 16%
- Visit an amusement park or theme park: 12%
- Go to a winery, brewery, or distillery: 12%
- Attend a festival or other non-sports special event: 8%
- Attend an amateur or professional sporting event: 7%

SOURCE: Longwoods International. Fielded March 3, 2021
What would make them comfortable?

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

### Primary Trip Motivators

- Spend time with my bubble
- Relax or escape stress
- Get away from everyday life

*Source: Destination Analysts, February 2021*
CUSTOMER SATISFACTION
A shift in how our guests are defining customer service. And it ain’t pretty.
Customer Dissatisfaction has increased 17%
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)

- Not enforcing masking rules: 171.1
- Not enforcing social distancing rules: 102.4
- Not enforcing crowd limits: 78.4
- Staff not permitting access to exhibit/experience: 69.0
- Rude staff: 52.4
- Staff behaving unprofessionally (“goofing around”): 51.3
- Staff not paying attention: 28.5
- No staff or volunteers available to help: 26.4
- Rude volunteer: 19.2
- Not enforcing no smoking rules: 9.6

TRAVEL BEHAVIOR

Not enforcing safety protocols is the reason!
Visitor Perceptions of Staff and Volunteers Roles
(Associated 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)

<table>
<thead>
<tr>
<th>Primary role</th>
<th>Description</th>
<th>Primary role %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety of visitors</td>
<td>Managing crowd capacities, ensuring mask compliance, enforcing social distancing</td>
<td>73.2%</td>
</tr>
<tr>
<td>Greeting and wayfinding</td>
<td>Welcoming visitors, helping direct visitors, providing basic information</td>
<td>19.7%</td>
</tr>
<tr>
<td>Interpretation and demonstration</td>
<td>Sharing information, explaining exhibits, supporting “hands on” experiences</td>
<td>7.0%</td>
</tr>
</tbody>
</table>
We need to keep an eye on this.
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
<table>
<thead>
<tr>
<th>Roadtrip travel</th>
<th>Outdoor recreation and spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic travel</td>
<td>Niche travel</td>
</tr>
<tr>
<td>Growth in private family or “bubble” tours, trend toward smaller group tours continues</td>
<td>Safety messaging and enforcement will continue to be important</td>
</tr>
</tbody>
</table>
COMMUNICATIONS CHANNELS

MESSAGING
Interest in learning about destinations and experiences is growing.
Channels

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

Geofencing is a virtual geographical boundary to target display ads on mobile devices to your customer.
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 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
Website
E-marketing
Video
- Tell guests what to expect and how to prepare.
Website

• Tell guests what to expect and how to prepare.
Print

- Get your print materials to the places where the people are already.
In-Person
• Use visuals as soon as they enter and throughout the property.

PRACTICE SOCIAL DISTANCING

Keep 1 state mammal apart OR

Keep 8 state birds apart

THANK YOU
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

FACE MASKS ARE REQUIRED.

PRACTICE GOOD HYGIENE

PLEASE WAIT HERE
THANK YOU

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

<table>
<thead>
<tr>
<th>Action</th>
<th>People</th>
<th>Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-planning</td>
<td>Mkt/Visitor Experience</td>
<td></td>
<td>Determine the experience and decide messaging.</td>
</tr>
<tr>
<td>Create FAQ</td>
<td>MKT</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Stakeholder Communications</td>
<td>MKT/Volunteer Program, HR, Membership and Development</td>
<td></td>
<td>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 or town hall meetings.</td>
</tr>
<tr>
<td>Develop promotion messaging visuals for web, social, email print and onsite</td>
<td>MKT</td>
<td></td>
<td>Messaging will be consistent with and build on stakeholder messaging. Include visuals and use consistently throughout all channels with the exception of social media.</td>
</tr>
<tr>
<td>Pitch Media</td>
<td>Mkt/Visitor Experience</td>
<td></td>
<td>How will the experience change and why? What can guests expect? Share what’s fun, interesting or different.</td>
</tr>
<tr>
<td>Re-evaluate</td>
<td>Mkt/Visitor Experience</td>
<td></td>
<td>Measure your results with customer feedback. Short online surveys can give you a snapshot of your success.</td>
</tr>
<tr>
<td>Make a back-up plan</td>
<td>Mkt/Visitor Experience</td>
<td></td>
<td>Develop messaging in case you need to close. Be honest and ask for your guests’ support. Commit to communicate and follow through.</td>
</tr>
</tbody>
</table>
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CONTRIBUTORS
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