



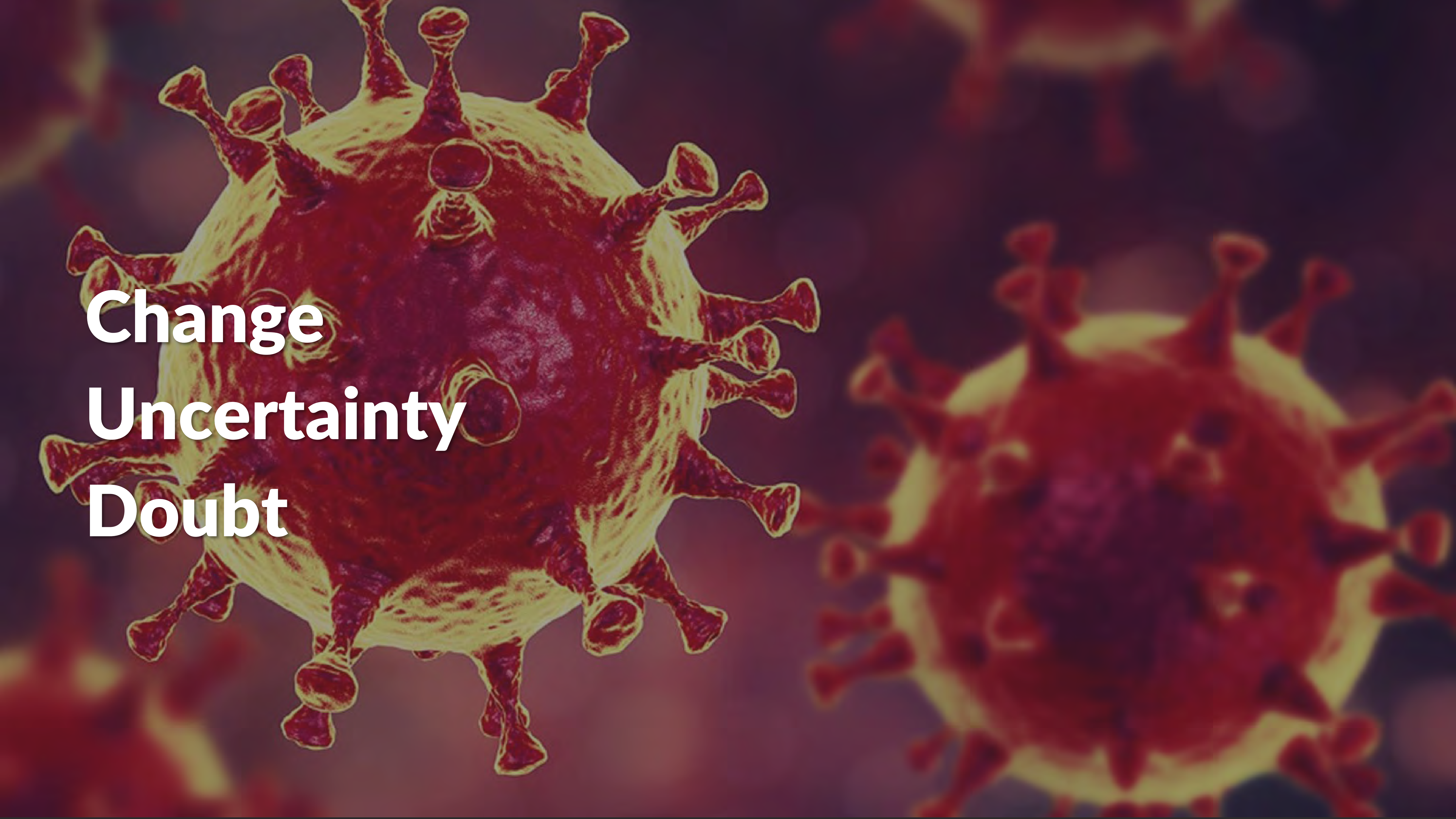
THE STATE OF THE AMERICAN TRAVELER **DESTINATIONS EDITION**

Spotlight Segment: COVID-19 Traveler Sentiment Study

MARCH 12, 2020

Destination  Analysts

miles
PARTNERSHIP



**Change
Uncertainty
Doubt**

With You



Chris Adams

*Head of Research and Insights
Miles Partnership*

Chris.Adams@MilesPartnership.com

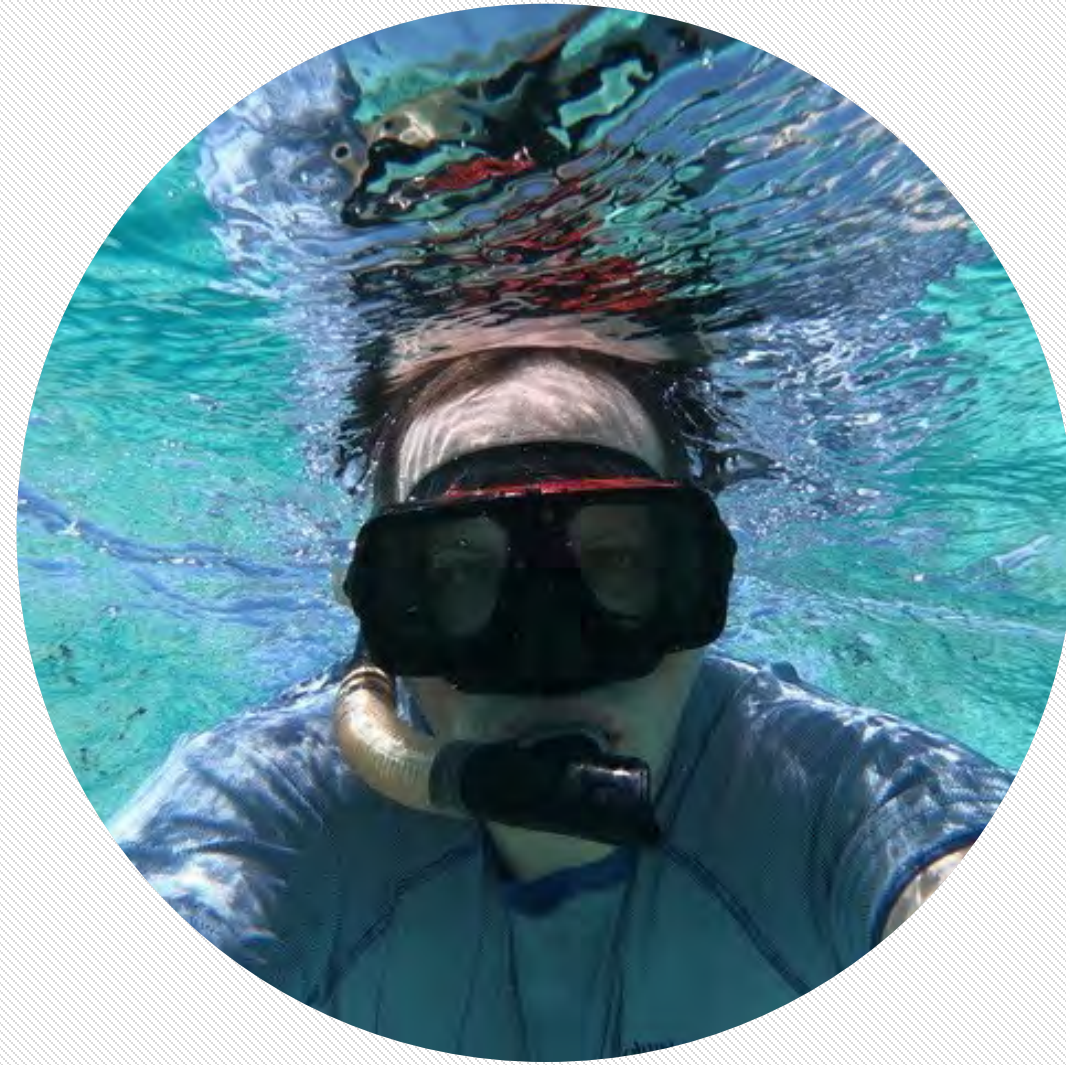


Dave Bratton

*Founder & Managing Director
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Dave@DestinationAnalysts.com

Guest Presenter



Martin Stoll

CEO

Sparkloft Media

martin@sparkloftmedia.com

SPARKLOFT

Thanks to:



The State of the American Traveler: Destinations Edition

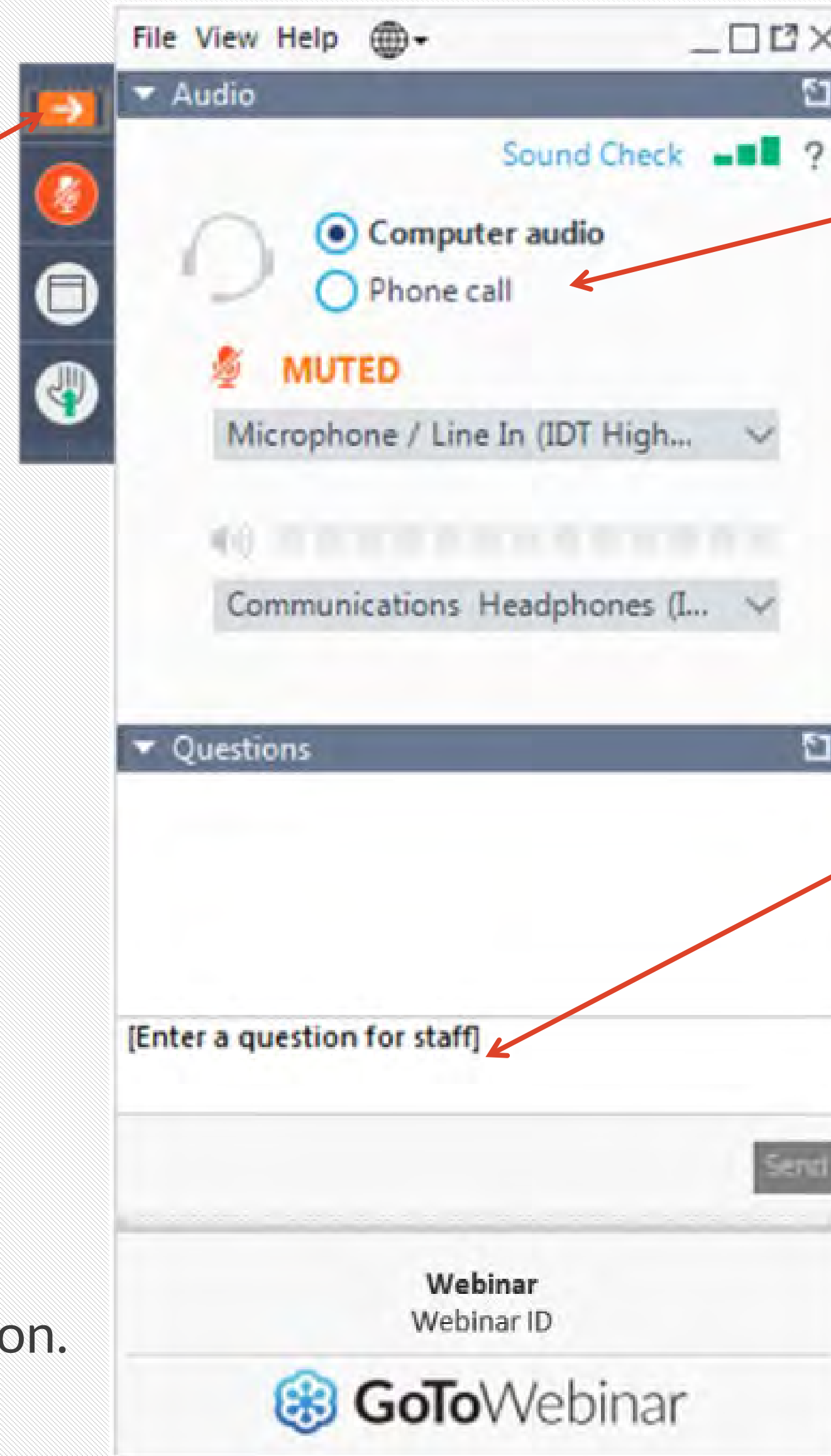
Research, slides and other resources will be available at
www.milespartnership.com/SAT
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How to participate

- Use your link to rejoin the webinar in the event you are disconnected.
- A Q&A session will be held at the end of today's presentation.
- Today's webinar is being recorded and will be available in follow up.

Open or close the control panel with the orange button.



Choose to use computer audio or dial in by phone.

Have a question? Ask it here.

Agenda

1. Destinations Edition Research
2. COVID-19 Traveler Sentiment Report
3. Additional Resources
4. Q&A

Expert Sources of Information

Links available at www.milespartnership.com/SAT

- CDC
- World Health Organization
- Destinations International
- U.S. Travel
- and others...

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Emergency Preparedness and Response: Coronavirus (COVID-19)

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COVID-19

What Events Professionals Need to Know

Trustworthy news and useful tools for the business events industry.

UPCOMING COVID-19 WEBINARS

RISK MANAGEMENT RESOURCES

LATEST NEWS

PRESS INQUIRIES

A MESSAGE FROM PRESIDENT & CEO SHERRIF KARAMAT

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FAQs

As a Business Events Professional, What Should I be Thinking About?

What Future Precautions Can I Take as a Business Events Professional?

What Can I Do to Protect Myself and Others?

COVID-19 Facts & Travel Restriction Updates

More than 113,600 people — primarily in China — have been diagnosed with COVID-19 coronavirus following an outbreak that originated in Wuhan, China, in December 2019.

More than 80 countries have imposed travel restrictions. The Council of Foreign Relations, a think tank, has created a [global tracker](#) with a comprehensive list of travel restrictions, including flight and visa restrictions.

Coronavirus: Where The CDC Says To Avoid Travel Or Take Precautions

WARNING LEVEL 3	ALERT LEVEL 2	WATCH LEVEL 1
RECOMMENDATION Avoid Nonessential Travel AFFECTING China, South Korea, Iran, Italy	RECOMMENDATION Practice Enhanced Precautions AFFECTING Japan	RECOMMENDATION Practice Usual Precautions AFFECTING Hong Kong



All other countries with confirmed cases

Notes

COVID-19 cases unchanged since Feb. 28. Data for visibility with cases as of March 11.

Source: Centers for Disease Control and Prevention; The Center for Health Protection of the Department of Health of Hong Kong; The Center for Outbreaks, Infections and Epidemiology of the University of Hong Kong; The University of Hong Kong.

irmed an outbreak of respiratory illness caused by a first identified in Wuhan, Hubei Province, China in ly there are hundreds of confirmed cases in China, n City, with additional cases being identified in a internationally. The [first case in the United States](#) , 2020.

with authorities at the White House, Health and Disease Control and Prevention, the Department of ls at several U.S. airports about ongoing dustury can be constructive partners to current

have repeated frequently that it is safe for healthy re are no restrictions on travel within the United eling public to seek and heed the l to make fact-based travel decisions.

ID-19 and the meetings and events industry, visit [ronavirus-resources](#)

Page last updated March 10, 2020

Healthy Travel Practices

C

WHO SOCIAL GRAPHIC

Reduce your risk of coronavirus infection. Frequently clean hands by using alcohol-based hand rub or soap and water. After coughing and sneezing cover mouth and nose with bent elbow or tissue. Throw away tissue immediately and wash hands. Avoid close contact with anyone that has fever and cough. Thoroughly cook meat and eggs. Avoid unprotected contact with live wild or farm animals.

IPS

CORONAVIRUS QUOTES

"The coronavirus outbreak is a global health threat and it is in the best interests of the world to take coordinated action to prevent and control the spread of the virus."

CONTACT US

Tori Barnes

EVP, Public Affairs and Policy

Email

Greg Staley

SVP, Communications

Email

LINKS TO ADDITIONAL RESOURCES

CDC Situation Summary

CDC Information for Travelers

WHO Rolling Updates on Coronavirus Disease (COVID-19)

WHO Situation Reports Homepage

LOAD MORE

SEE ALSO

Playbook: Crisis Readiness and Response

THE STATE OF THE AMERICAN TRAVELER

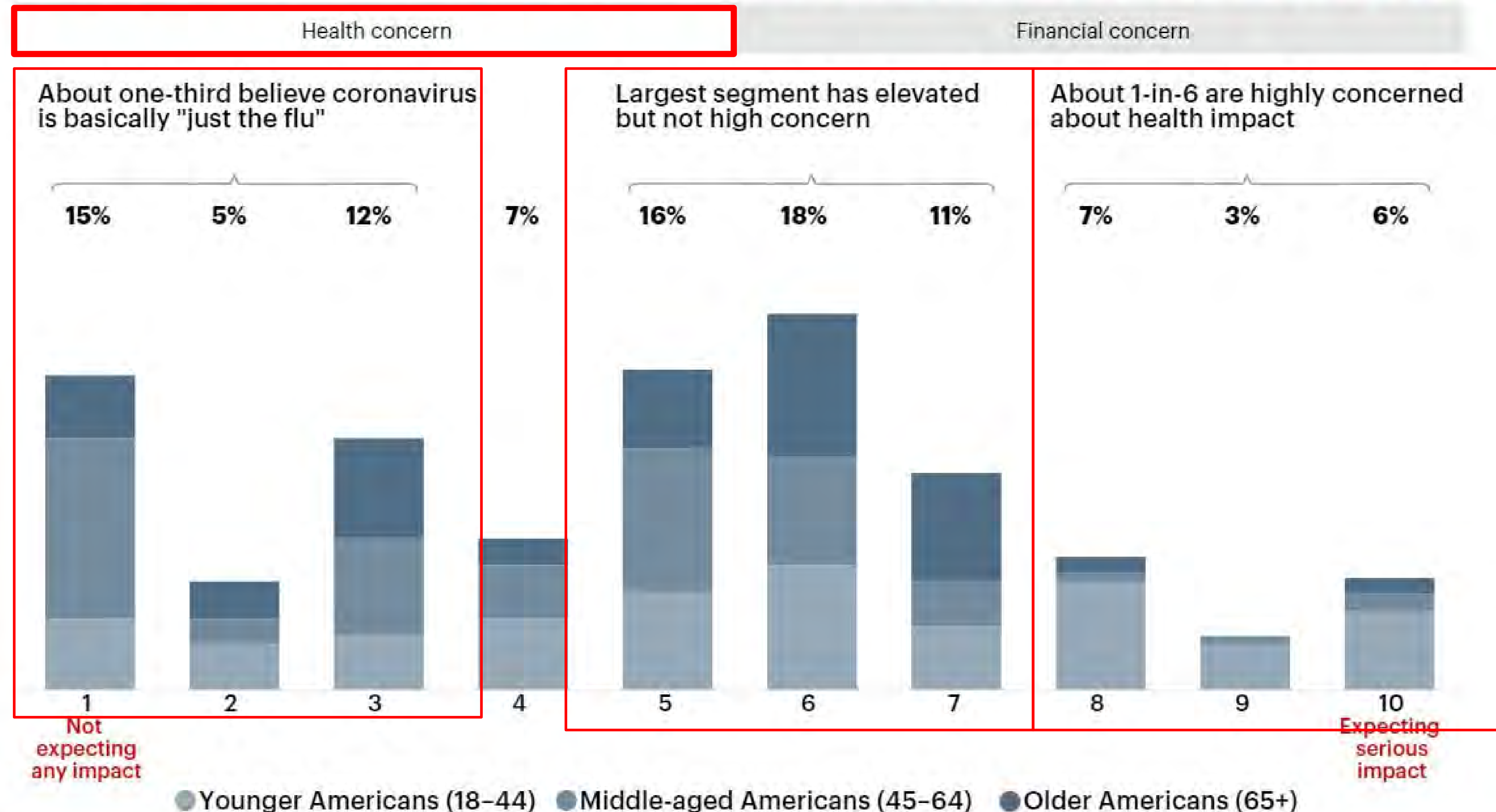
DESTINATIONS EDITION

Presenter: Dave Bratton, Destination Analysts

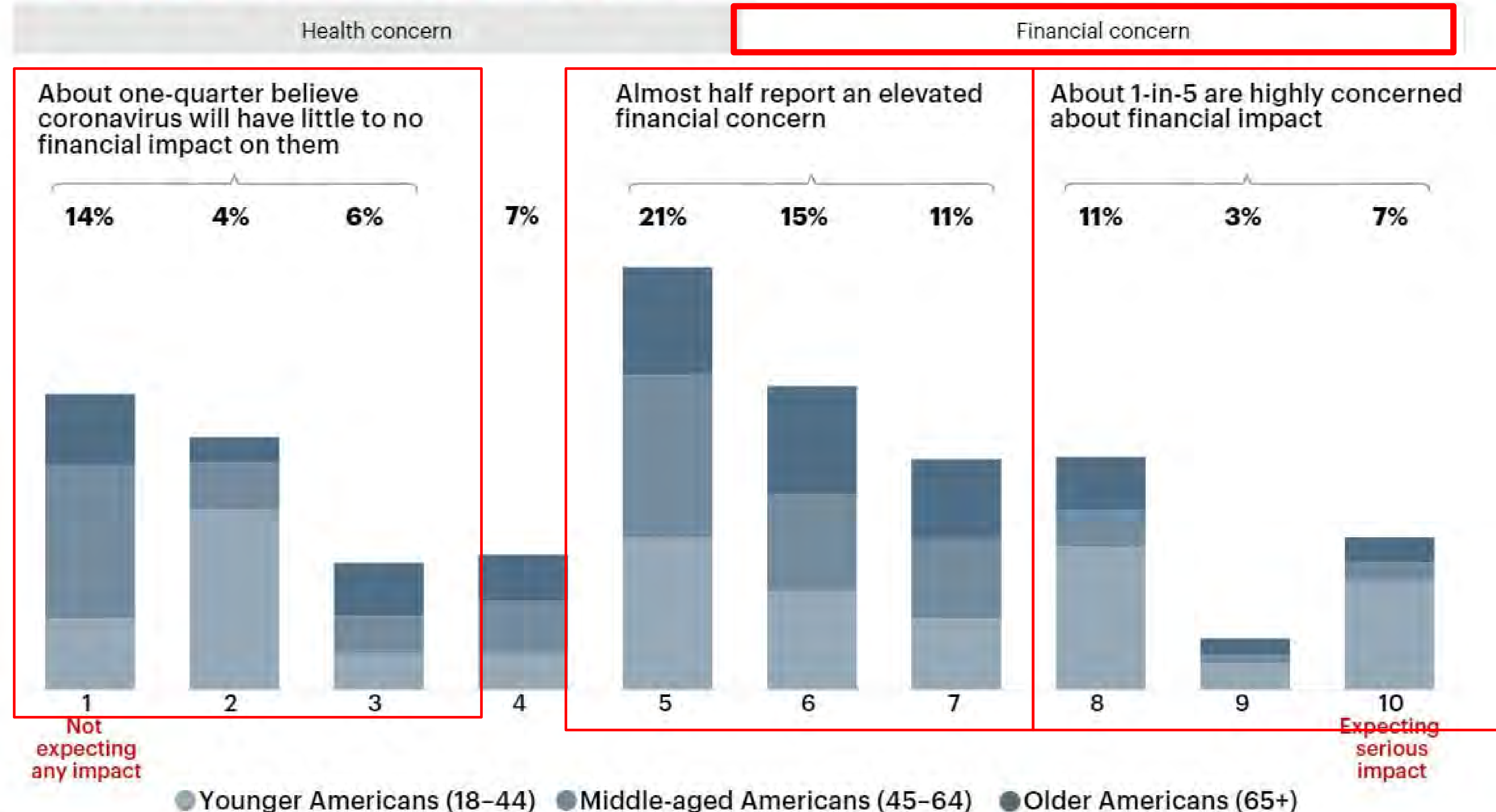
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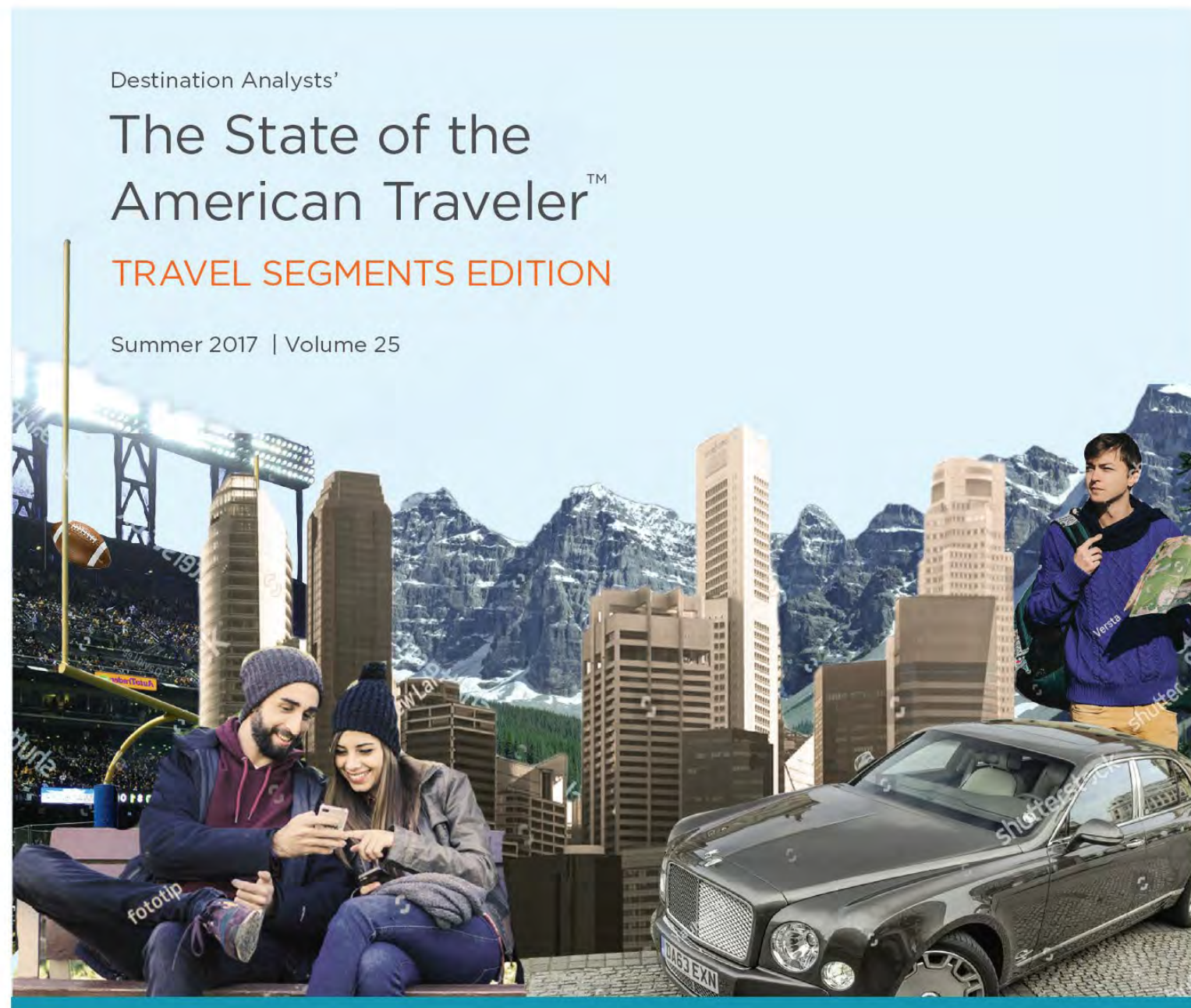
More people are worried about financial than health effects of COVID-19



More people are worried about financial than health effects of COVID-19



The State of the American Traveler



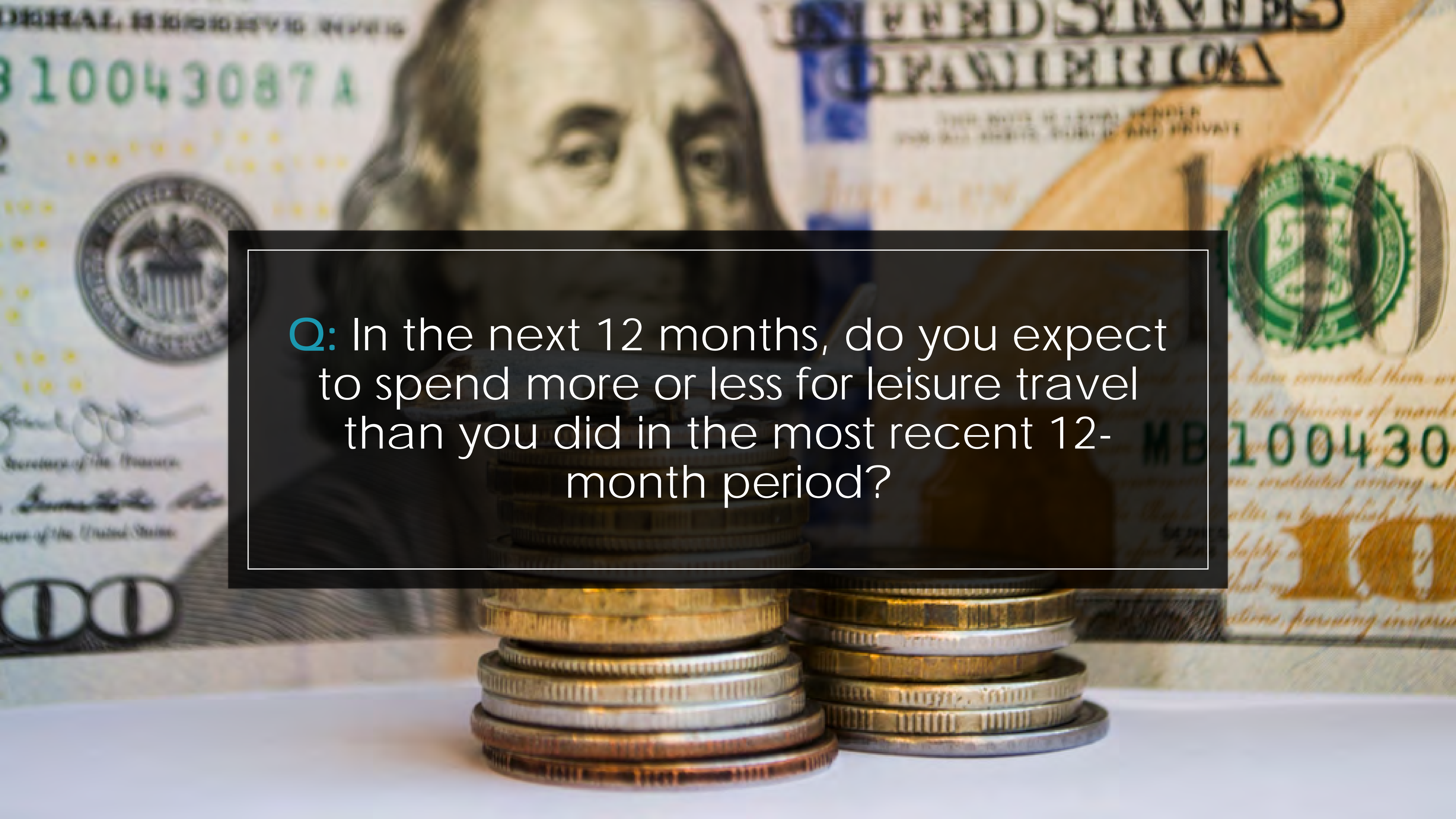
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- Online survey conducted since 2006
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000 American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- Quarterly project

Question: 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? (Select one)



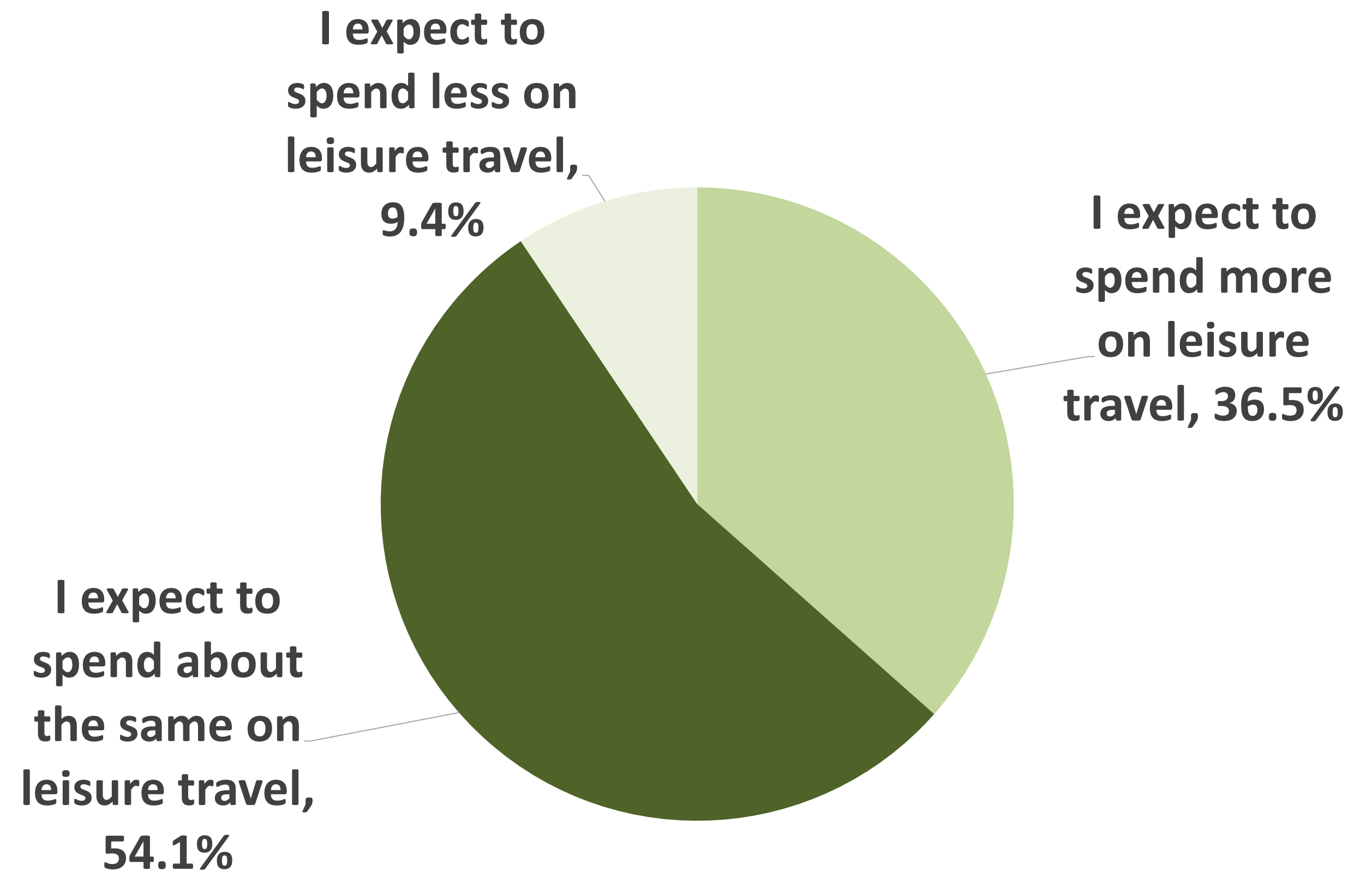
Question: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period? (Select one)



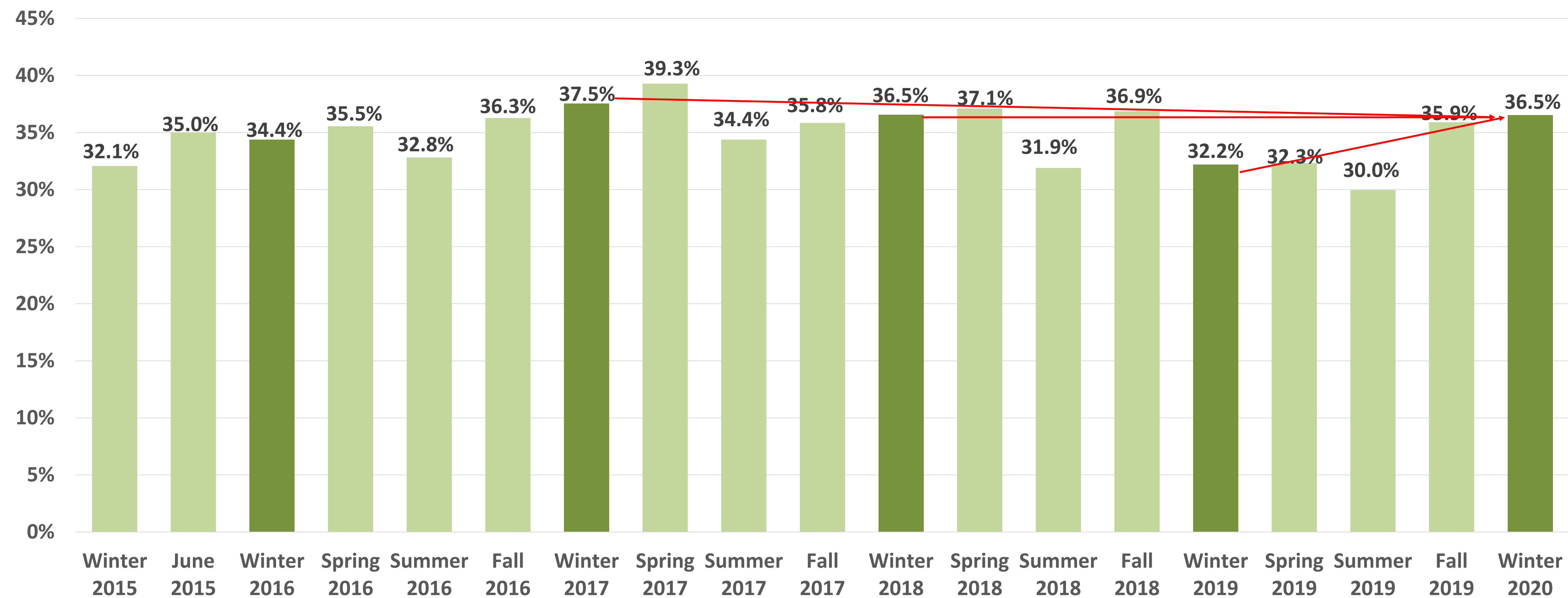
Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?

Leisure Travel Optimism: Expected Spending (Next 12 Months)

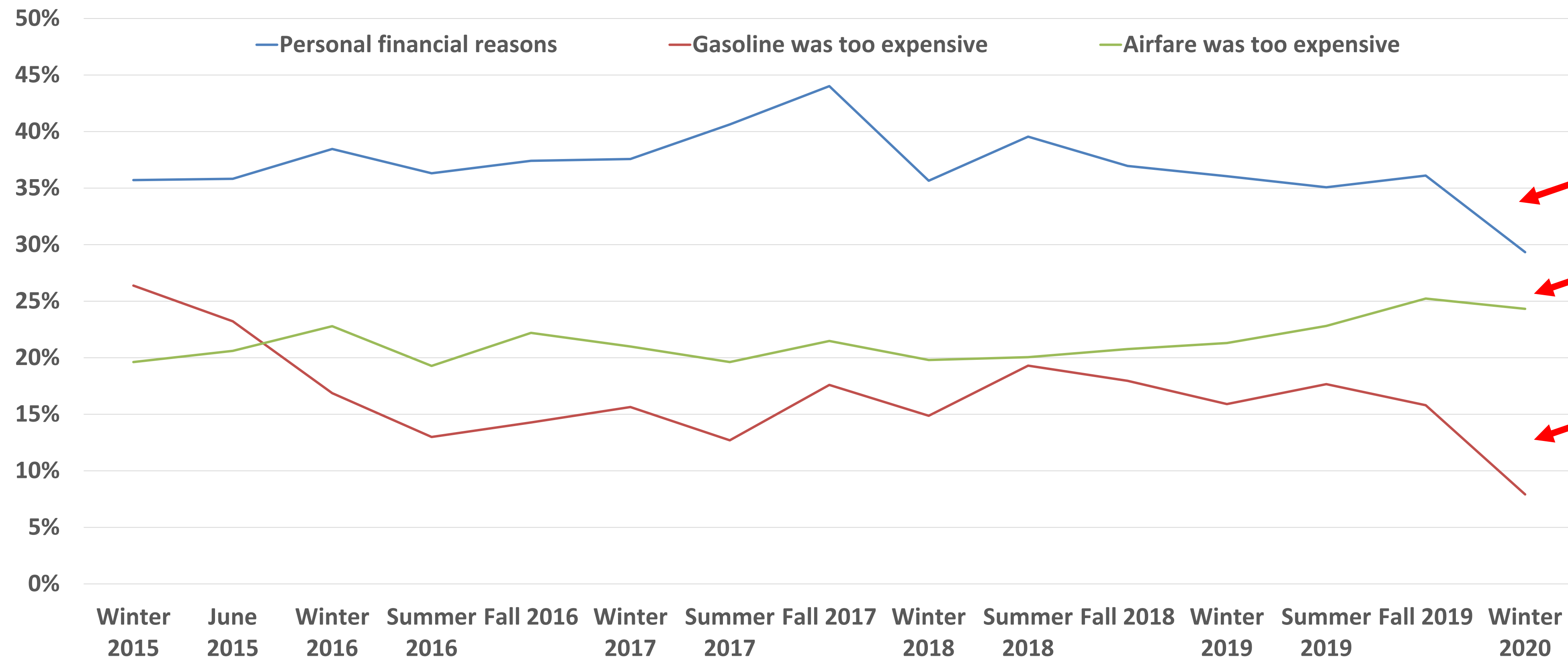
Question: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?



Leisure Travel Optimism: Expected Spending

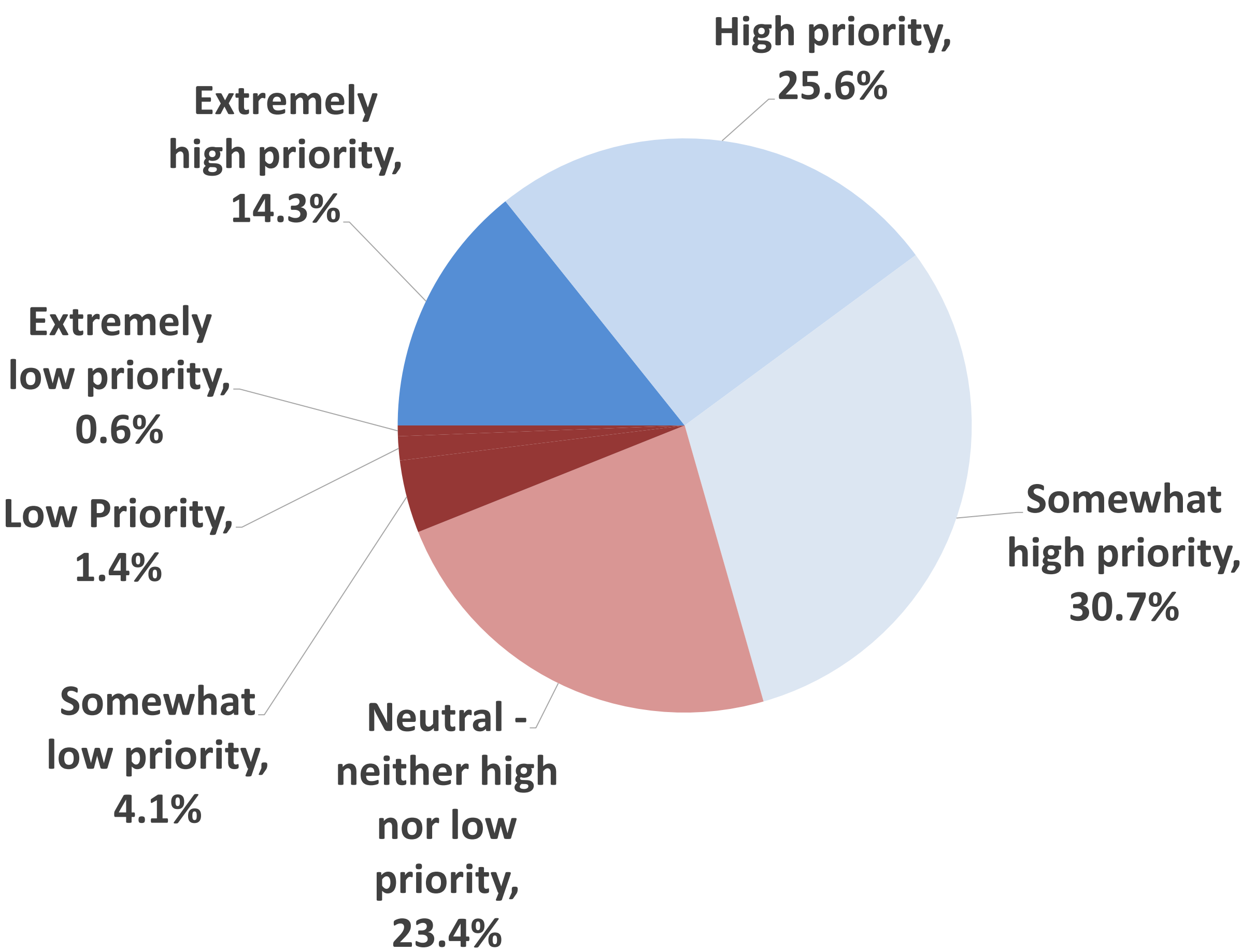


Question: In the PAST 12 MONTHS, which (if any) of the following kept you from traveling more for leisure in the U.S. than you would have otherwise preferred? (Select all that apply)



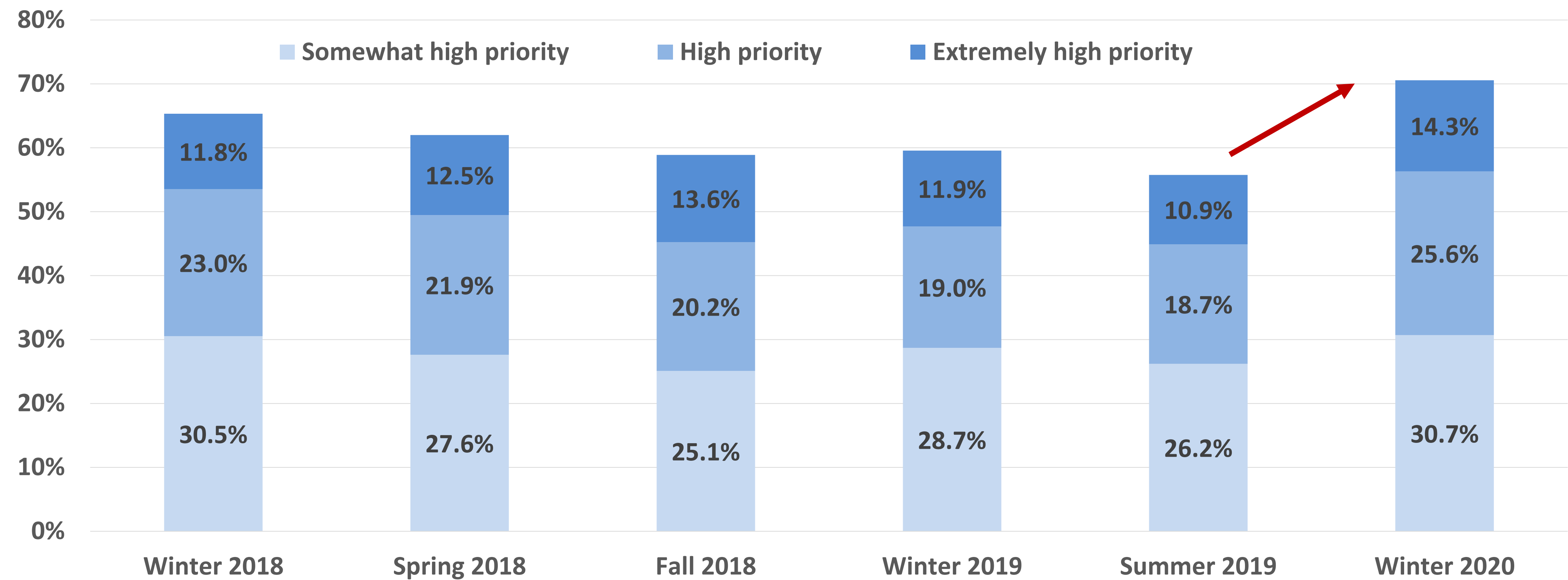
Travel as a Budget Priority

Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.



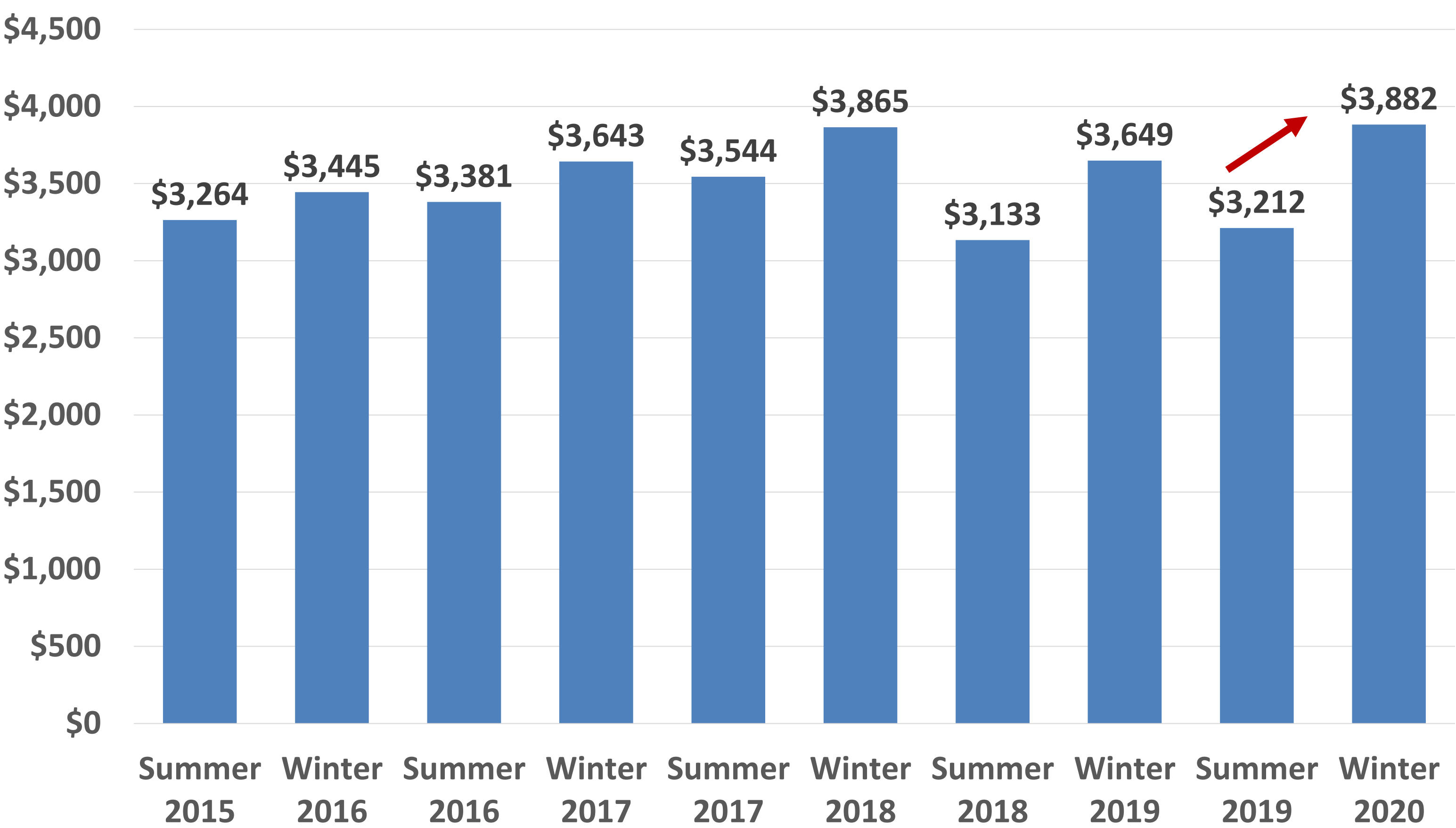
Travel as a Budget Priority

Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.



Expected Travel Budgets

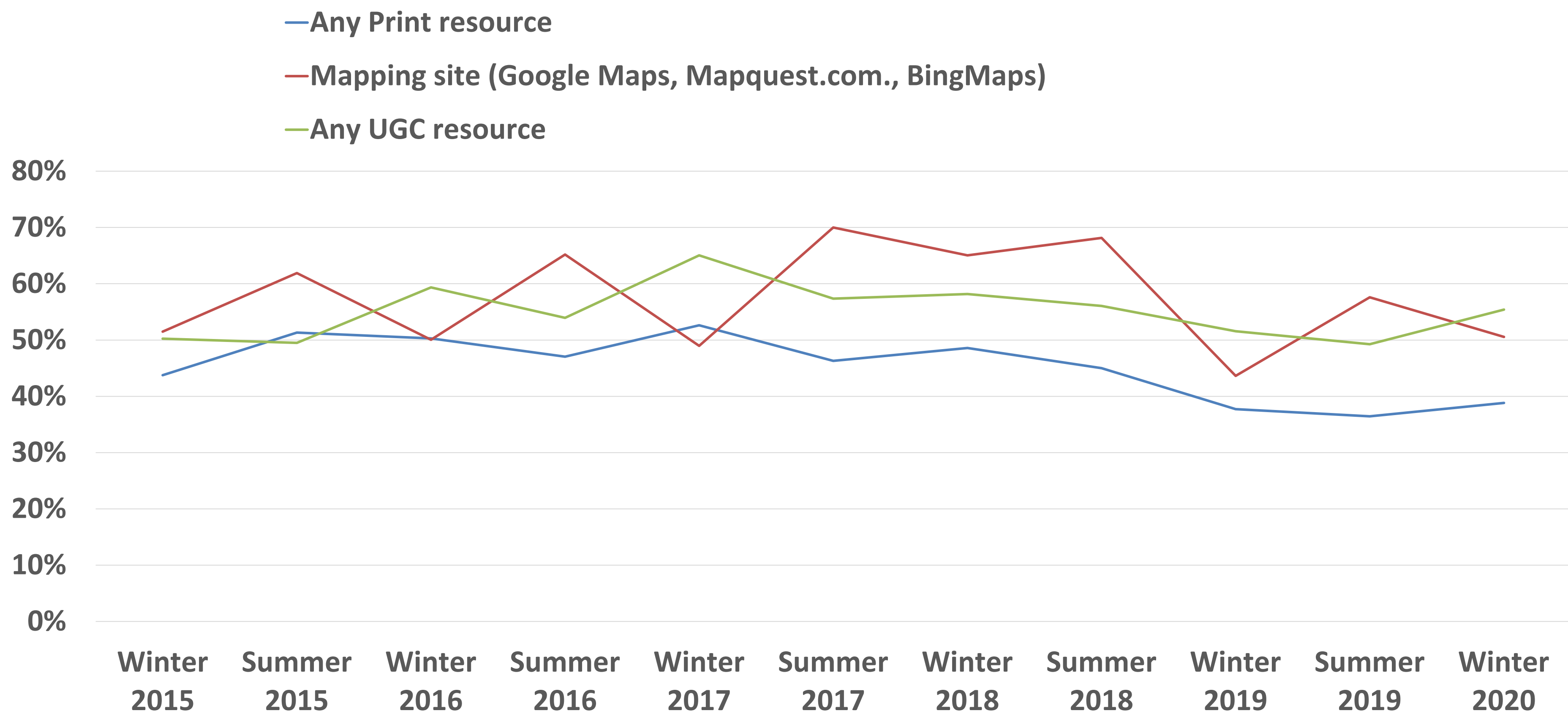
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?



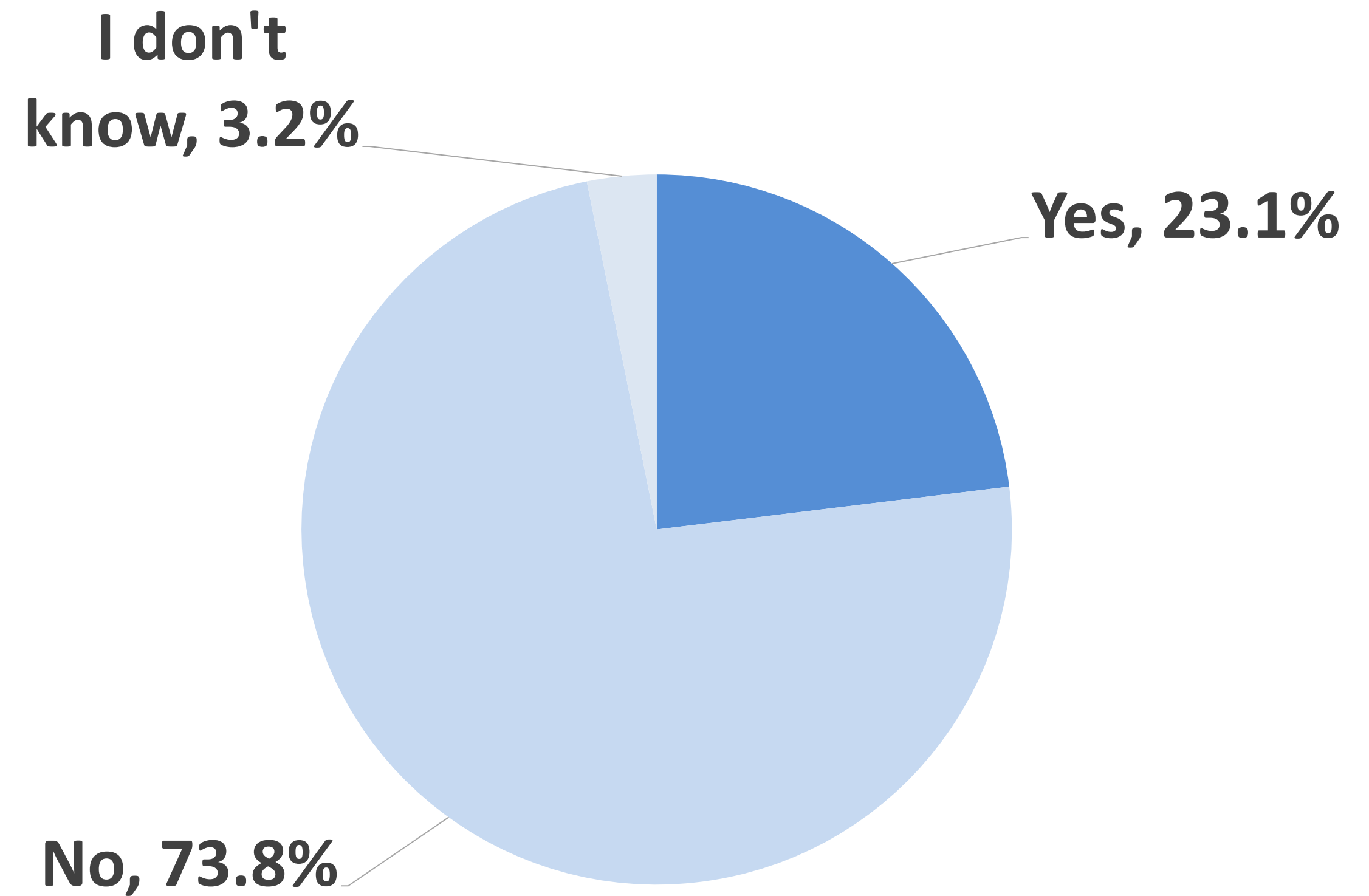
Travel Planning Resources Used



Question: In the past 12 months, which of these resources have you used to help plan your leisure travel?



Question: In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video or Google Video) to plan any of your leisure trips?



Question: How often do
you use ONLINE VIDEOS
to plan your leisure
trips?

Always – I use videos for every
trip I take

18.4%

Usually – I use videos for most
of my trips

32.5%

Sometimes – I use videos, but
not usually

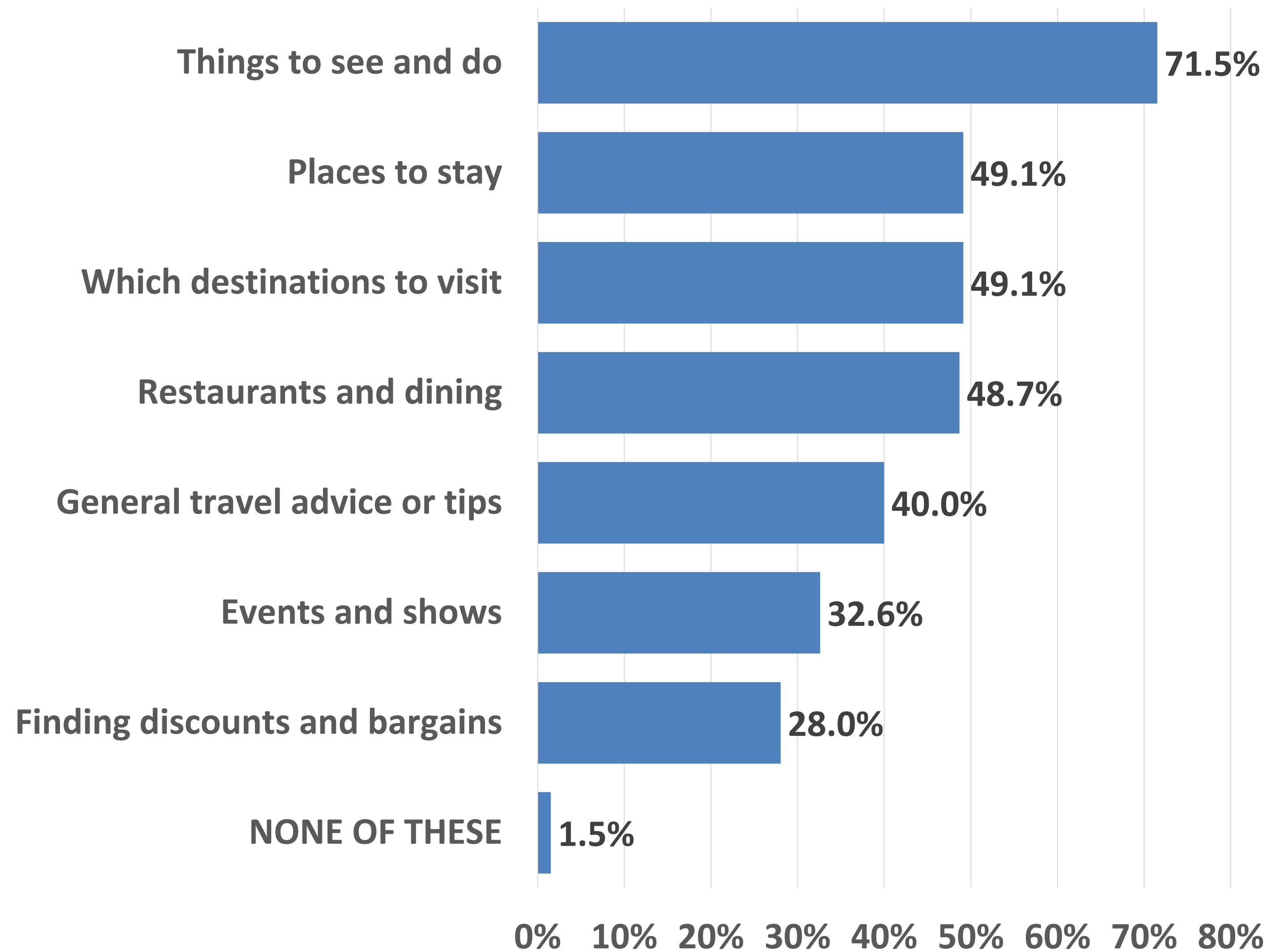
38.4%

Rarely – I seldom use video
often to plan my travel

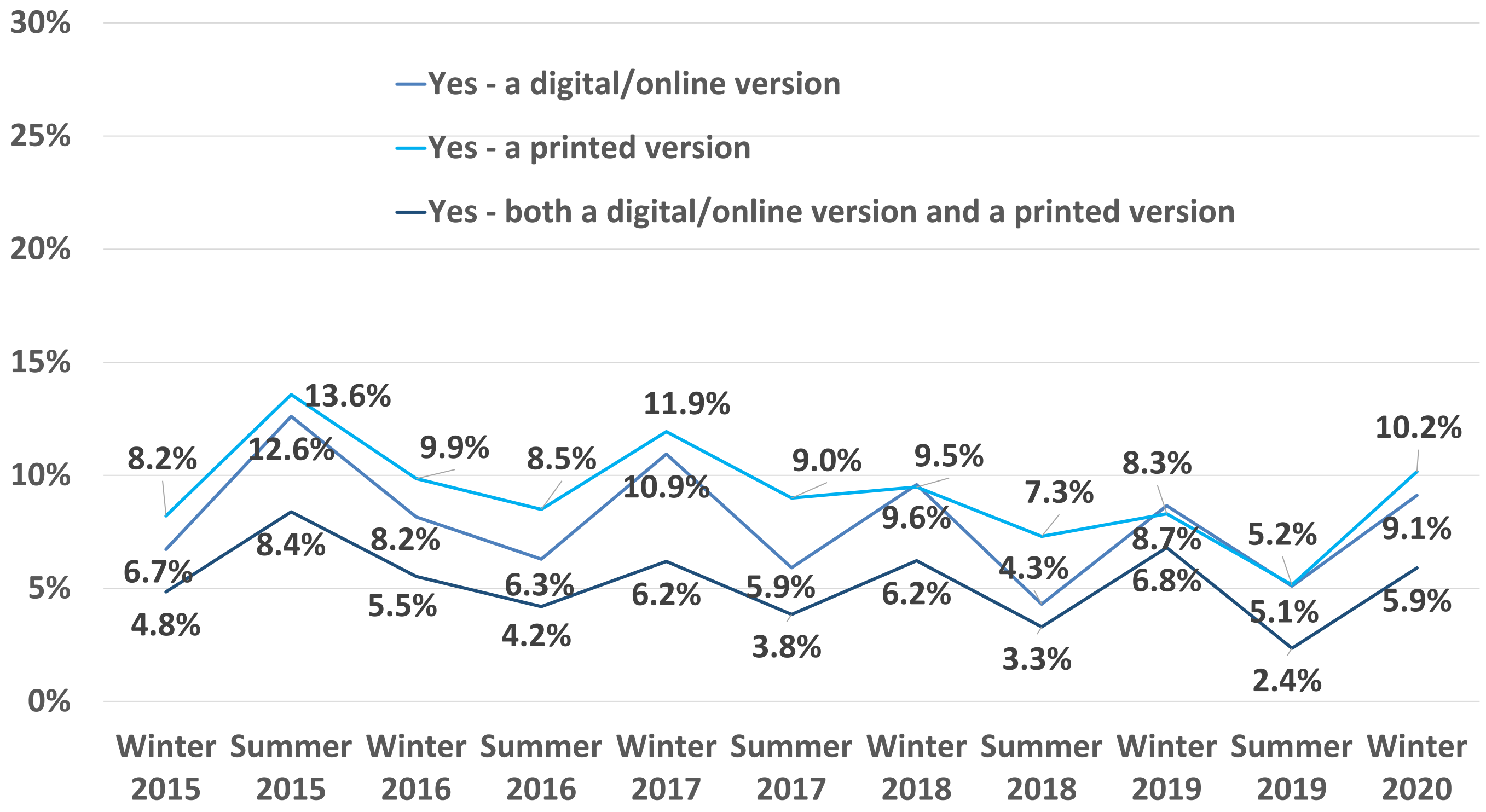
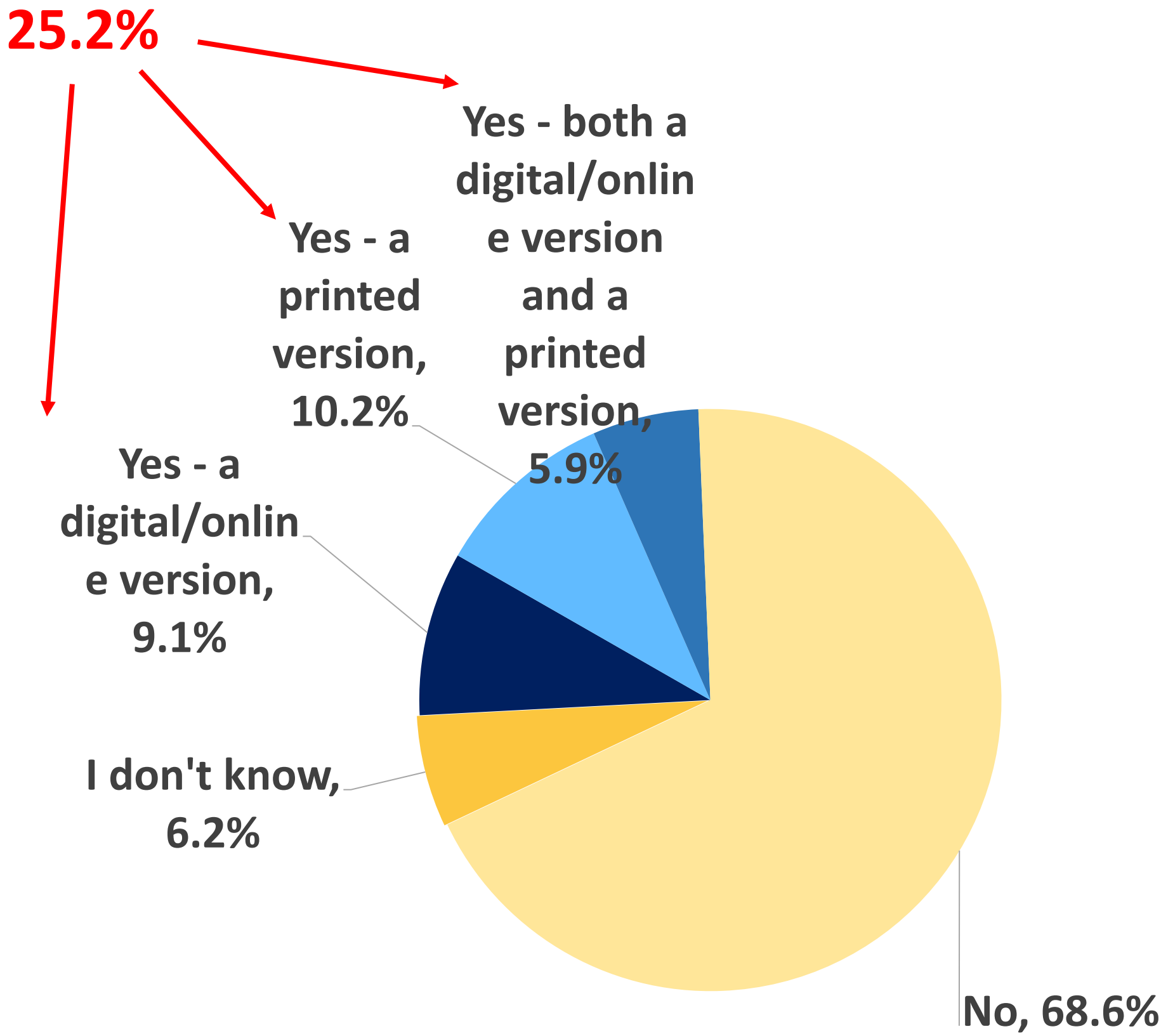
10.6%

0% 10% 20% 30% 40% 50%

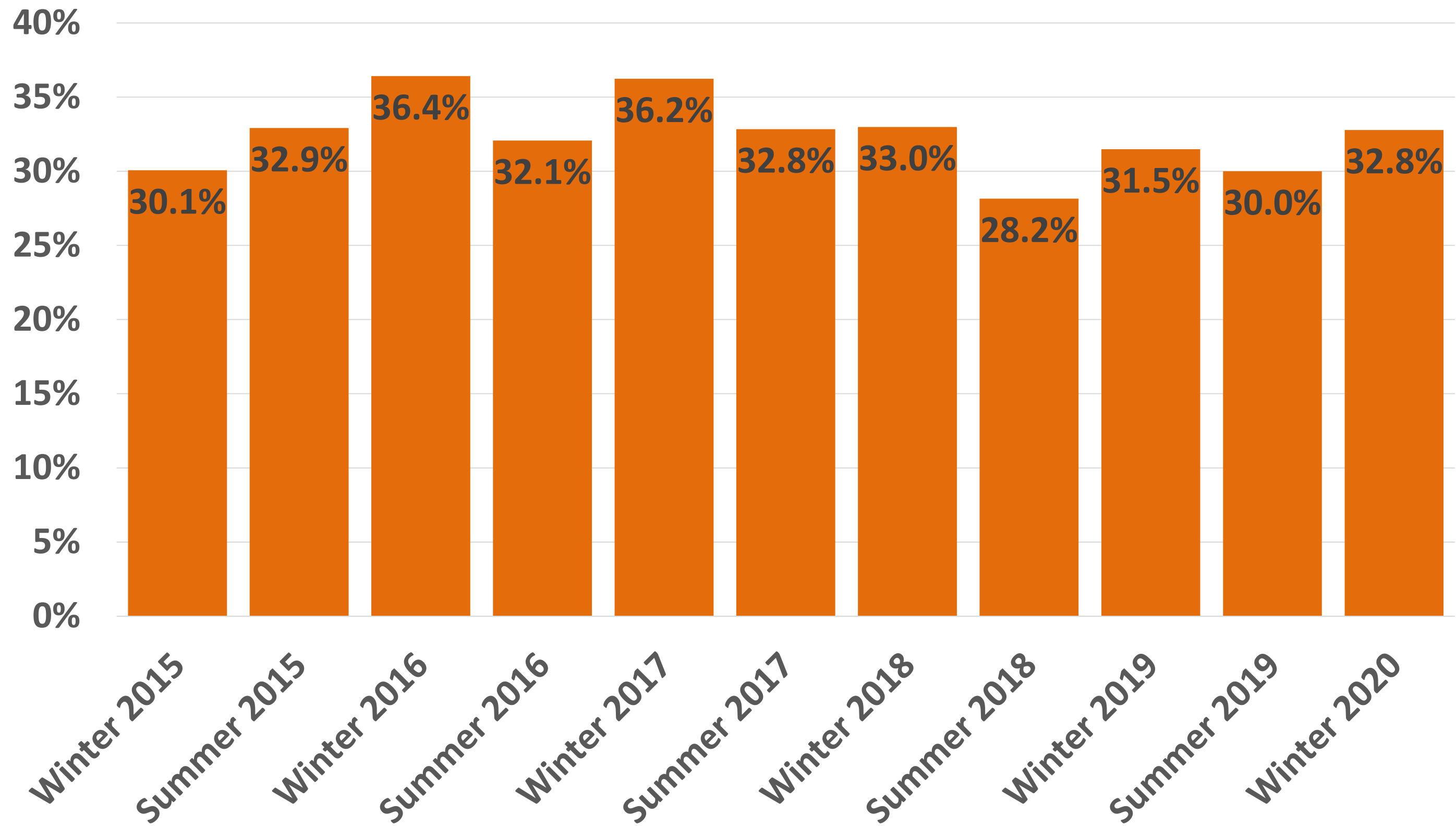
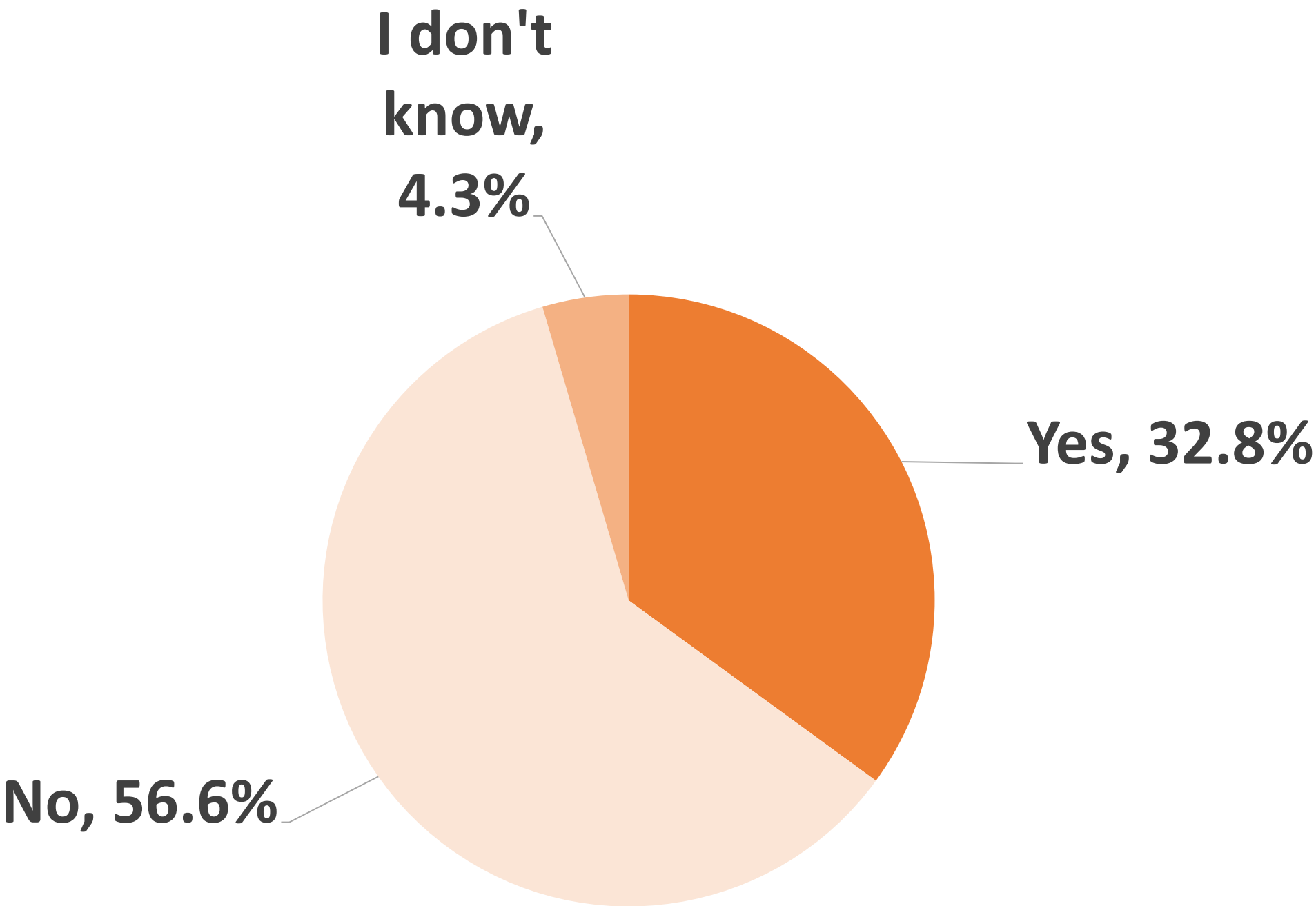
Question: In the past 12 months, which of these travel tasks have use used ONLINE VIDEO to help with?



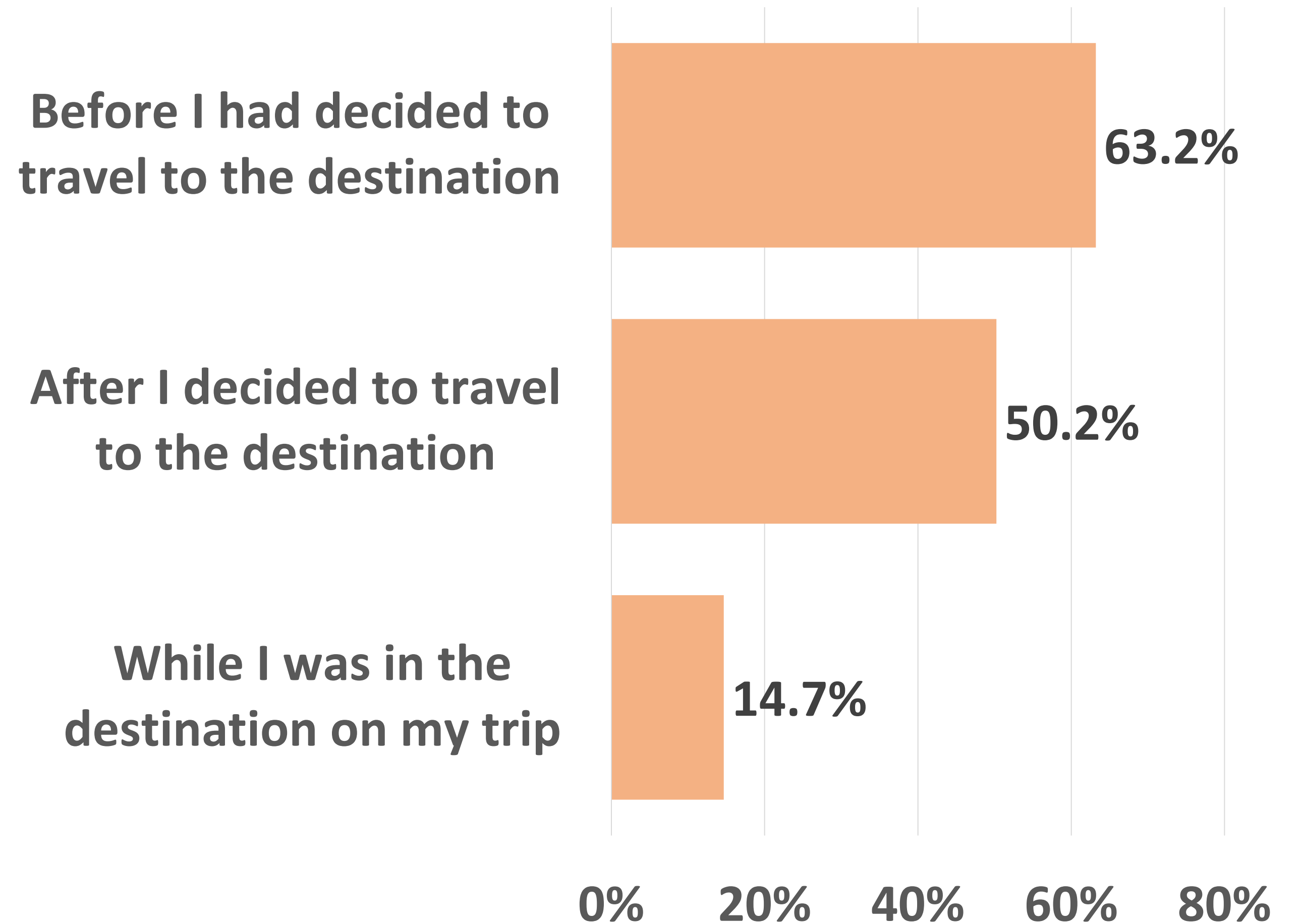
Question: In the past TWELVE (12) MONTHS, have you used an official visitors publication (eg: an official vacation planning guide) from a Visitors or Convention Bureau or state or national government travel office?



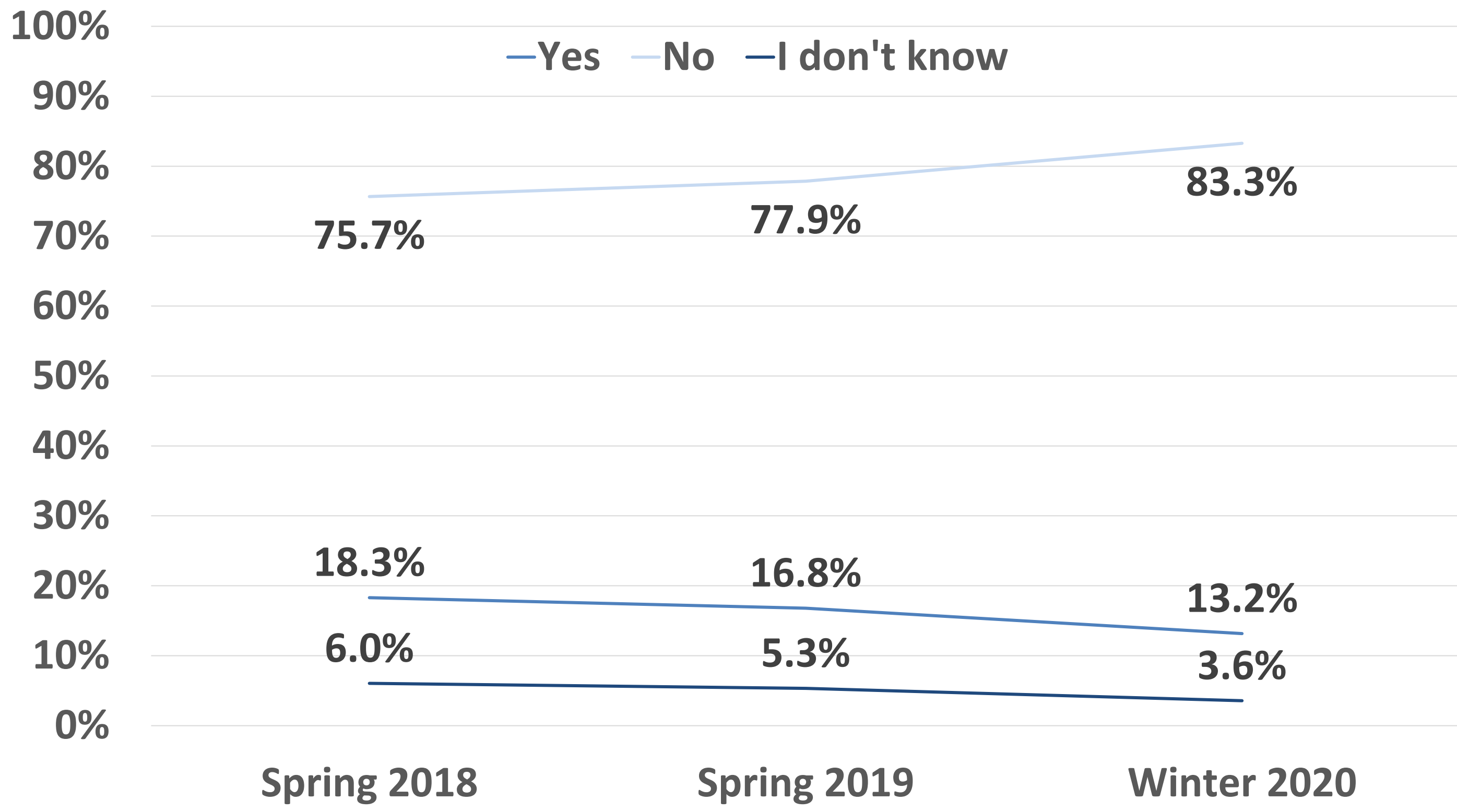
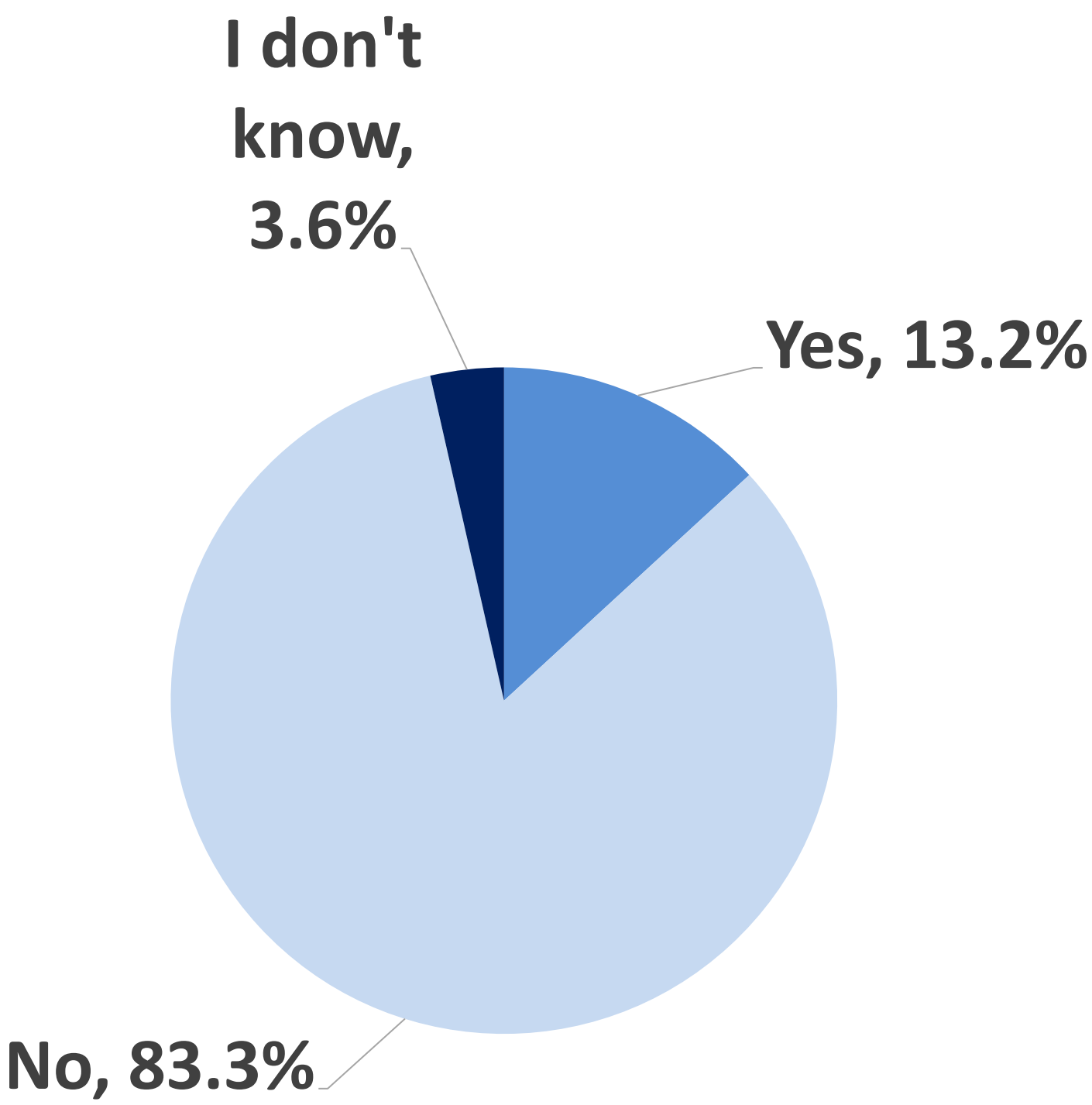
Question: In the past 12 months, have you used the official WEBSITE of a destination's local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?



Question: At which point in your travel planning did you use the website of a destination's visitors or convention bureau (or chamber of commerce) or state or national government travel office?



Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any leisure travel?



The State of the American Traveler: Destinations Edition

Research, slides and other resources will be available at
www.milespartnership.com/SAT
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SPOTLIGHT SEGMENT

COVID-19 TRAVELER SENTIMENT STUDY

Presenter: Martin Stoll, Sparkloft

SPARKLOFT

CORONAVIRUS (COVID-19)

CORPORATE TRAVEL + EVENTS SENTIMENT - MARCH 8, 2020

SP/RKLOFT

WHY SOCIAL SENTIMENT?

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PROCESS & METHODOLOGY

UNDERSTANDING SENTIMENT DATA

Data sources: public social media data (social platforms, blogs, review sites etc.; Instagram limited)

Some of the data has geo-location and demographics information

Data pulled straight from platforms (firehose)

Data is analyzed through machine learning

Data is categorized by sentiment (positive, neutral, negative)

Process:

- 1) Formulate hypothesis
- 2) Identify relevant keywords
- 3) Identify keywords to exclude
- 4) Fine-tune keywords
- 5) Slice data in different ways (time, geo, filters etc.)
- 6) Data becomes more powerful when comparing over longer period of time

PROCESS & METHODOLOGY

UNDERSTANDING SENTIMENT & VOLUME



NEGATIVE

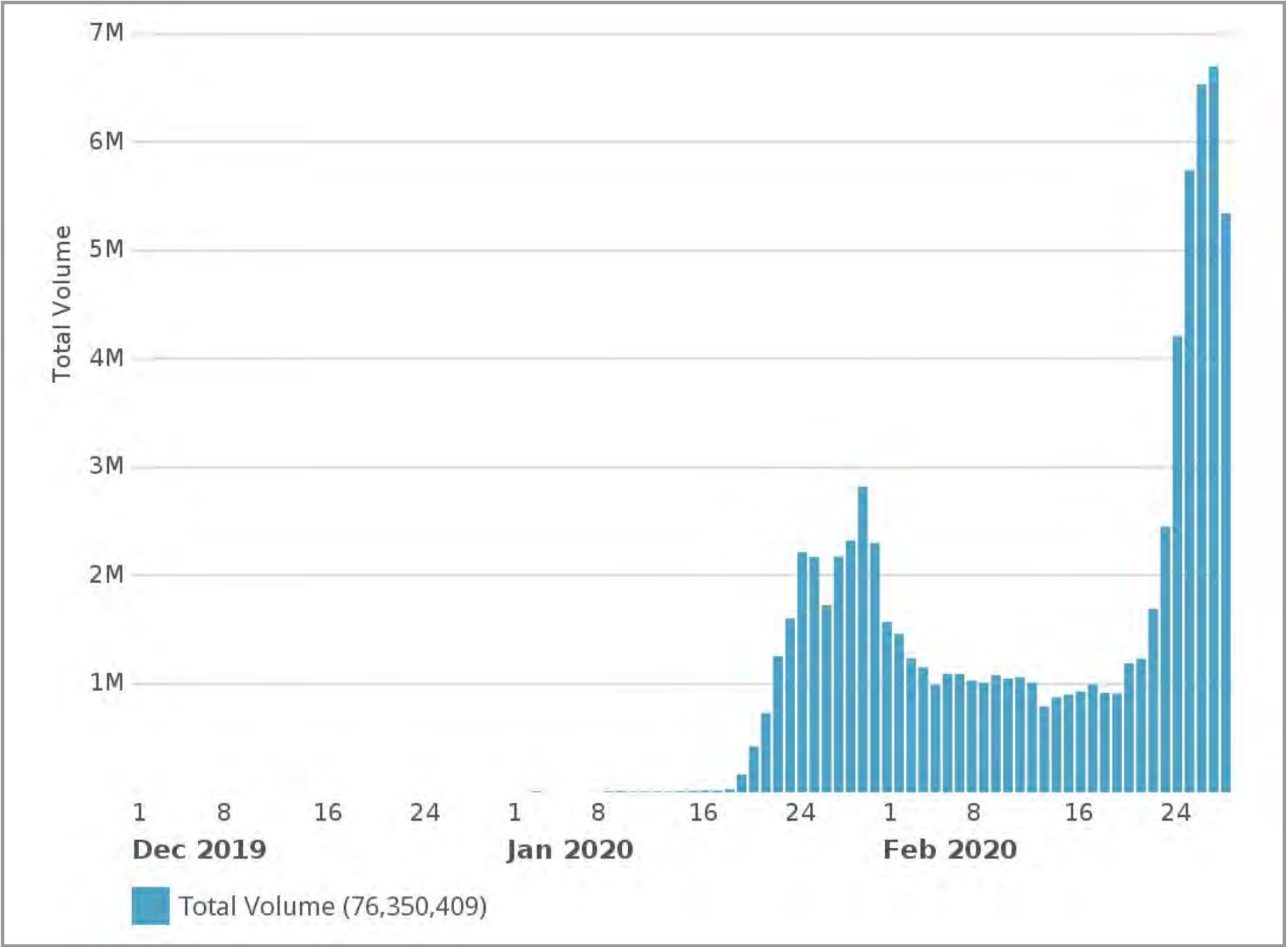


NETURAL



POSITIVE

Sentiment identifies if a post is positive, neutral, or negative.



Volume measures the total number of posts in the conversation and how they trend over the identified time period.

SOCIAL SENTIMENT USE CASE EXAMPLES

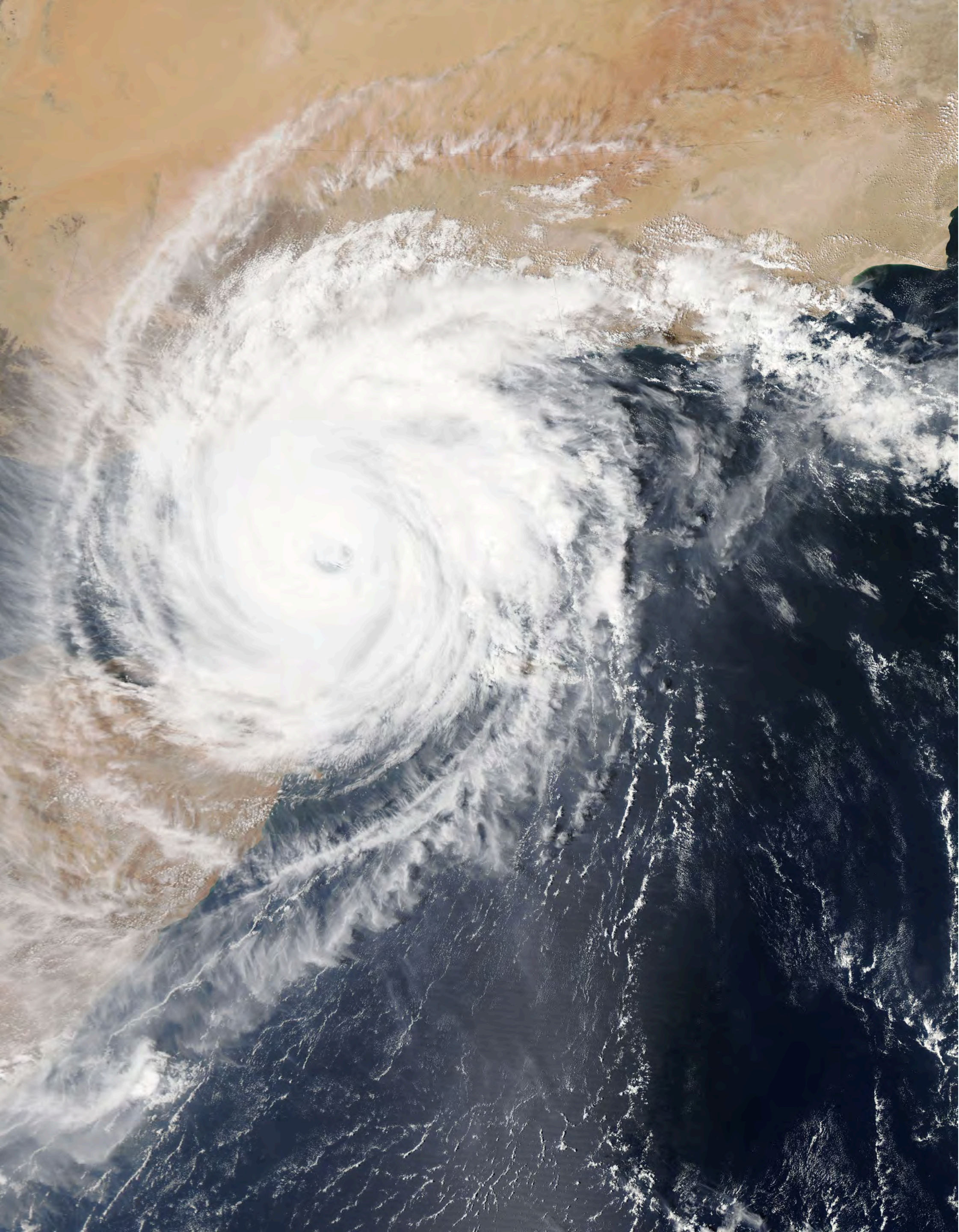
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HOW IS THE
HOMELESS
CRISIS
IMPACTING
OUR BRAND?





WHO
WANTS TO
VISIT
ALASKA IN
DECEMBER?



WHEN SHOULD
WE GO BACK
TO MARKET
AFTER A
CRISIS?



WHERE ARE
UNTAPPED
OPPORTUNITIES
FOR OUTDOOR
PRODUCT
DEVELOPMENT?

CORONAVIRUS (COVID-19)

CORPORATE TRAVEL + EVENTS SENTIMENT - MARCH 8, 2020

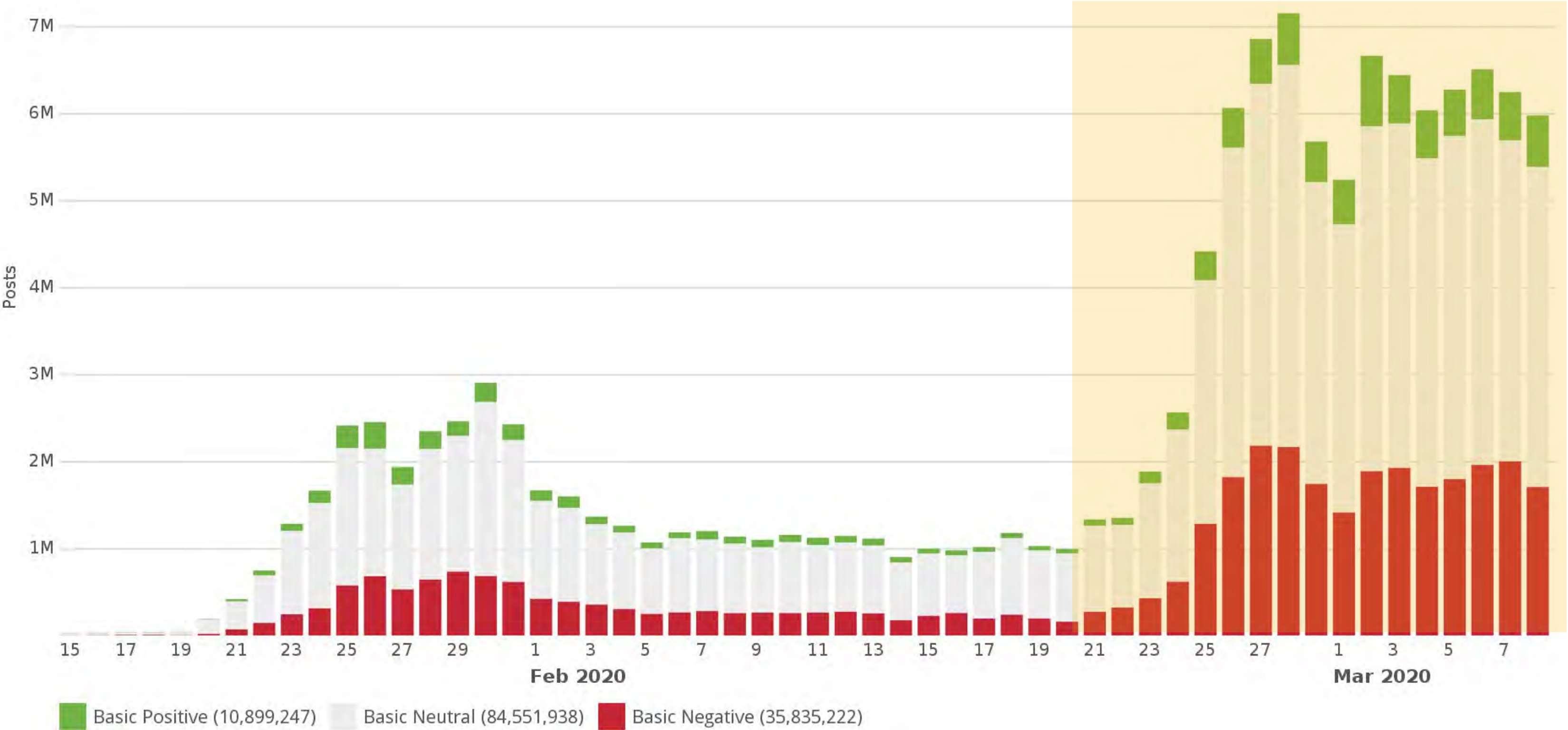
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SENTIMENT ANALYSIS

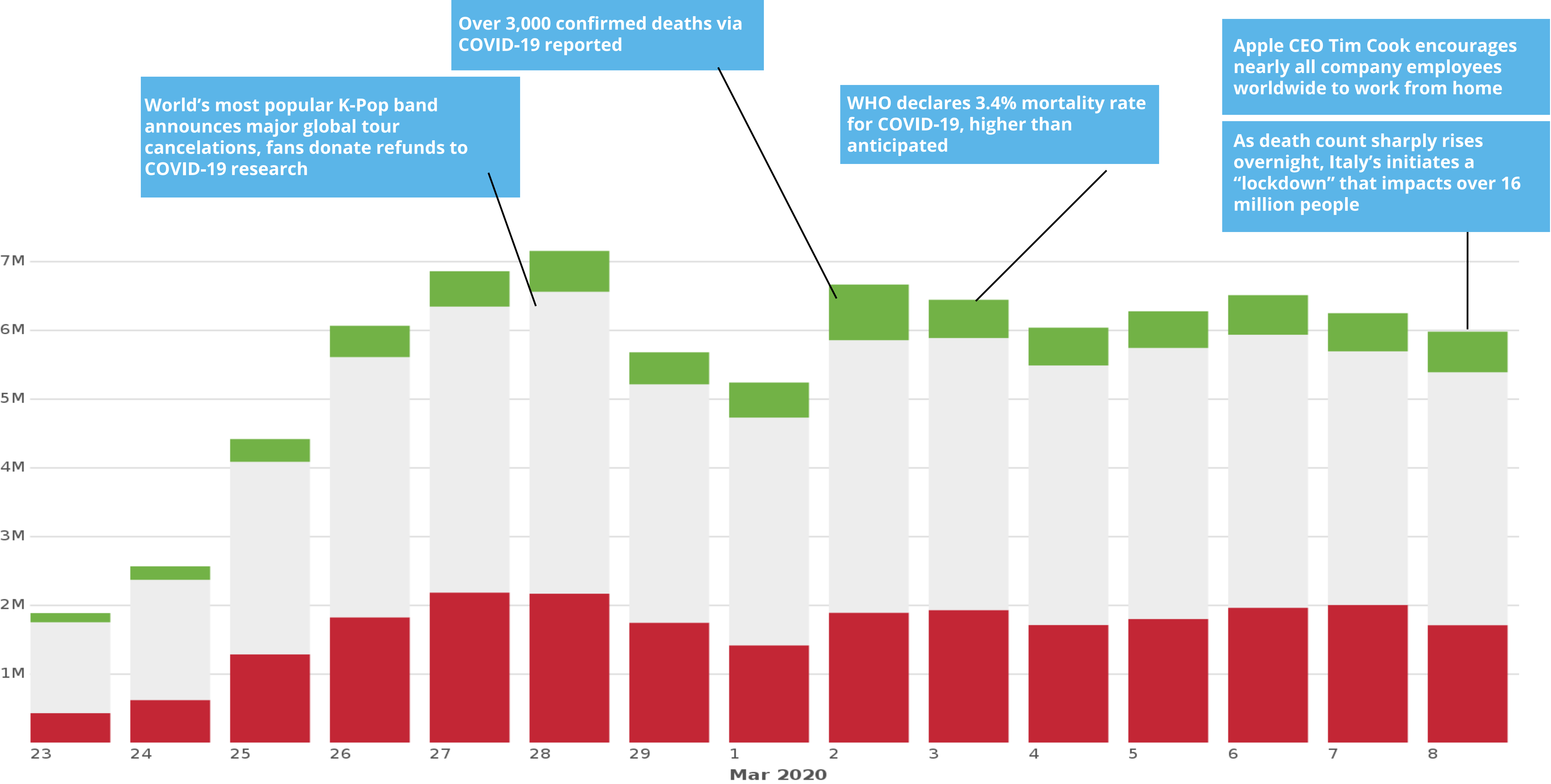
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OVERALL, GLOBAL: CONVERSATION STEADIES AT 6.1M DAILY POSTS

This condensed timeframe shares the volume of global social conversation from Jan. 15 to March 8, when the increase in reported cases caused increased social mentions. The total volume of conversation in the timeframe is 120 million posts. The peak remains Feb. 28, with frequent and sustained news stories, public and private policy changes and global politics sustaining the conversation volume. From Feb. 28 to March 8, the average daily volume of conversation is 5.6 million posts.



OVERALL, GLOBAL: FEB. 23 TO MARCH 8 TOP STORIES



GEOGRAPHIC BREAKDOWN (OVERALL)

Country	# of Posts	Percentage of Total Posts
United States of America	21,072,700	31.22%
Brazil	3,303,318	4.89%
France	3,090,504	4.58%
Indonesia	3,087,591	4.58%
United Kingdom	3,079,541	4.56%
Spain	2,830,641	4.19%
Japan	2,571,760	3.81%
Mexico	1,941,298	2.88%
Thailand	1,882,129	2.79%
Argentina	1,799,258	2.67%
India	1,676,719	2.48%
Italy	1,630,765	2.42%
Canada	1,532,112	2.27%
Malaysia	1,337,977	1.98%
Venezuela	1,026,581	1.52%



Global map of social conversation (darker fill is equivalent to greater volume)



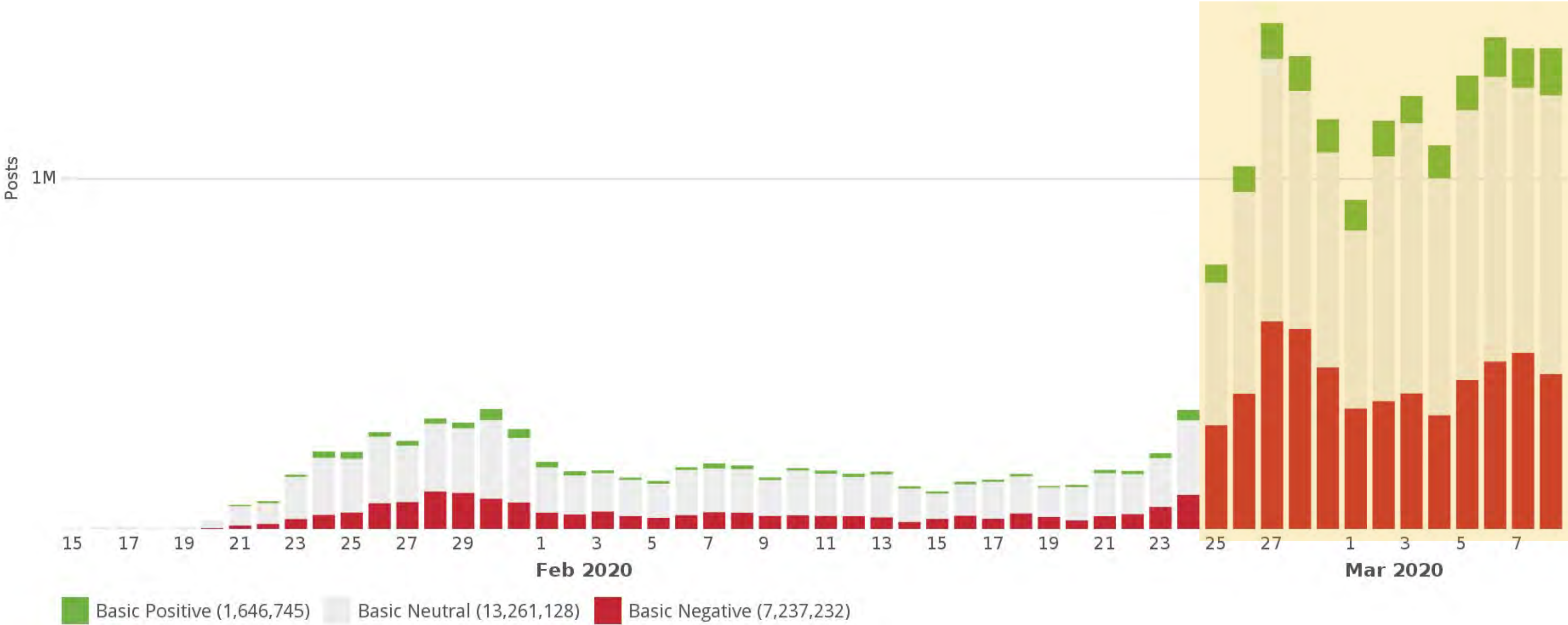
Global map of confirmed COVID-19 cases via CDC (as of March 8th)

Jan. 15 to March 8, and only posts with identifiable locations.

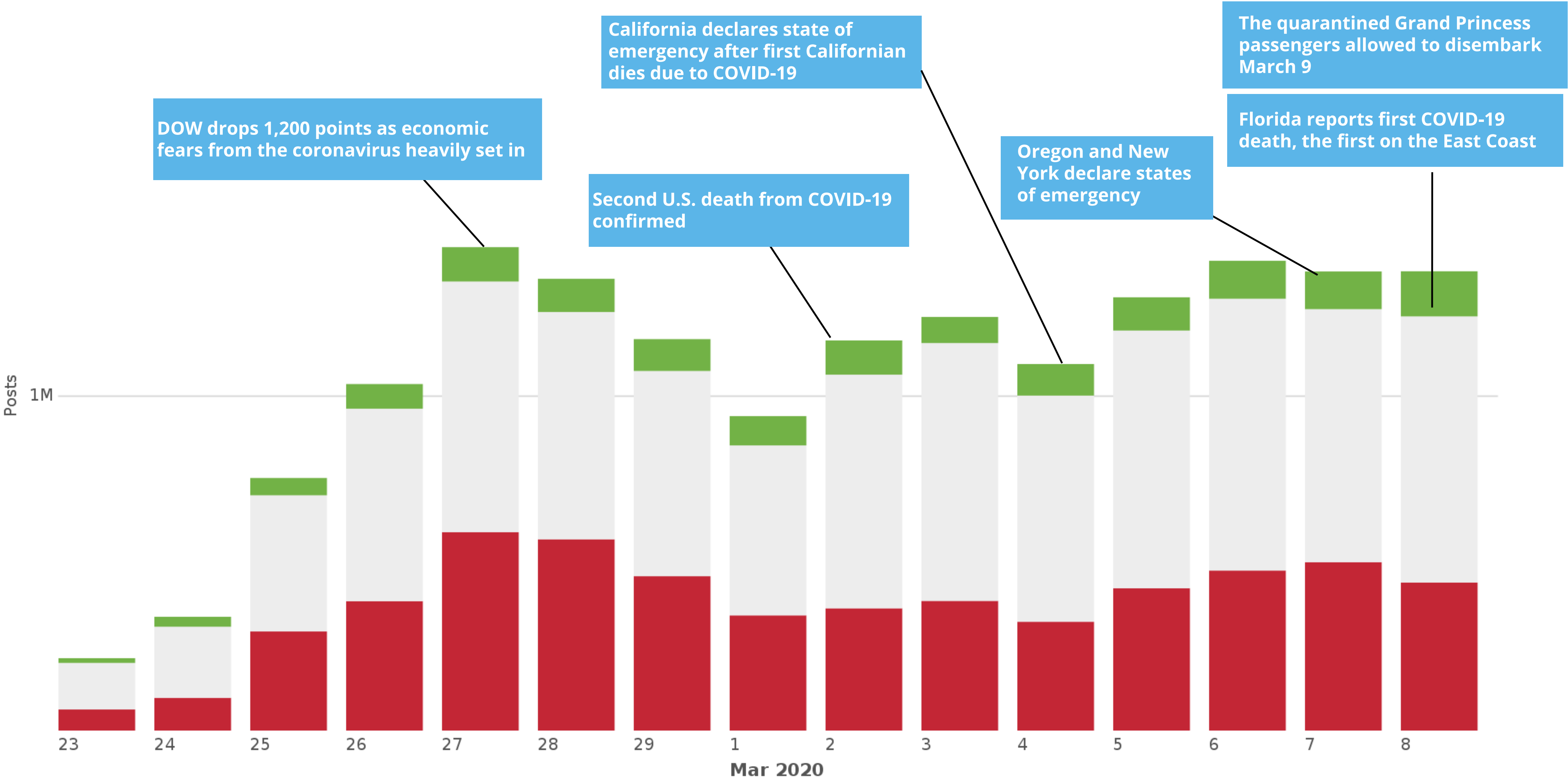
This graphs shows the 15 highest conversation volumes by country. The United States continues to leads the conversation with news outlets and the political cycle creating many discussions, contributing to roughly a third of global social postings. The most significant jump in conversation is the United Kingdom as cases increase and deaths are reported. The English Premier League (soccer/football) announced their no-handshake policy, as well as the possibility having no fan games, which also increased conversation.

OVERALL CORONA CONVERSATIONS, UNITED STATES:

This chart shares the volume of U.S. social conversation from Jan. 15 to March 8 related to anything regarding COVID-19. As the U.S. drives roughly a third of the coronavirus conversation, volume patterns have a strong similarity to the global conversation. The largest news organizations steer much of this conversation, as well as political voices (both official and supporters), primarily found in California, New York and Texas.



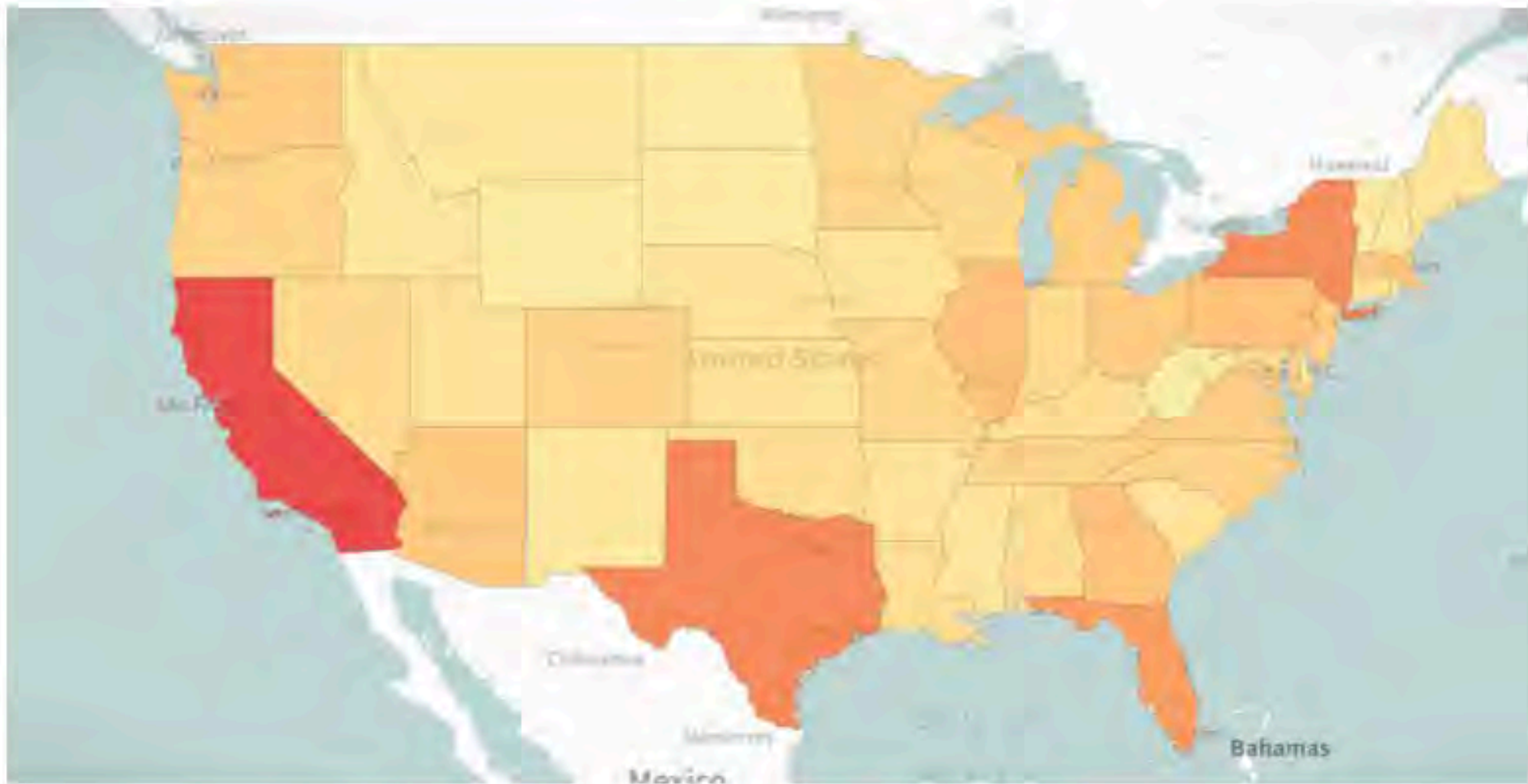
OVERALL, UNITED STATES: FEB. 23 TO MARCH 8 TOP STORIES



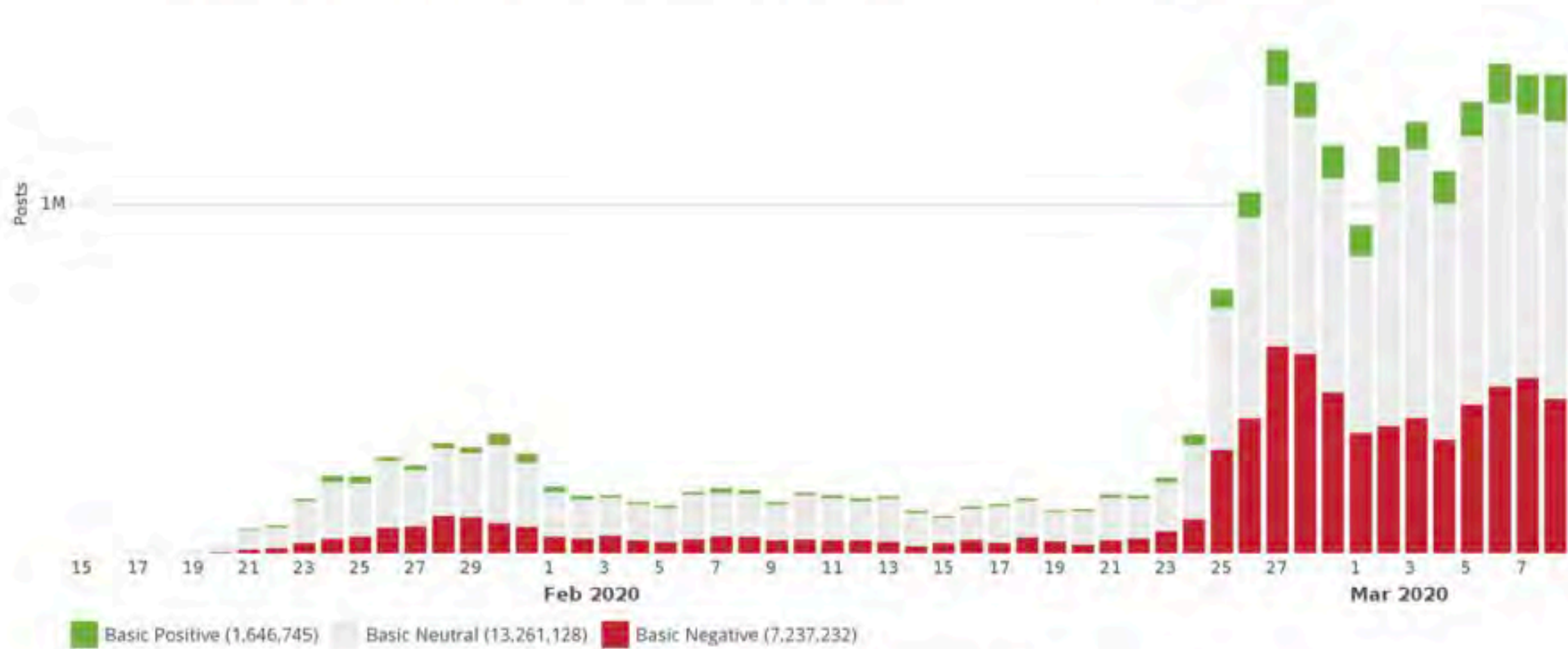
GEOGRAPHIC BREAKDOWN (OVERALL, UNITED STATES)

State	# of Posts	Percentage of US Total Posts
California	2,517,526	16.80%
Texas	1,505,950	10.05%
New York	1,446,456	9.65%
Florida	1,167,644	7.79%
Pennsylvania	530,464	3.54%
District of Columbia	528,715	3.53%
Illinois	516,880	3.45%
Georgia	452,601	3.02%
Washington	407,607	2.72%
Ohio	406,899	2.72%
Massachusetts	388,489	2.59%
Virginia	355,302	2.37%
Arizona	346,356	2.31%
New Jersey	309,552	2.07%
Michigan	306,391	2.04%
Tennessee	270,939	1.81%
Colorado	270,813	1.81%
Oregon	264,563	1.77%
Maryland	235,576	1.57%
North Carolina	222,456	1.48%

Jan. 15 to March 8, and only posts with identifiable states within the United States. Total volume: 22,145,101 posts.



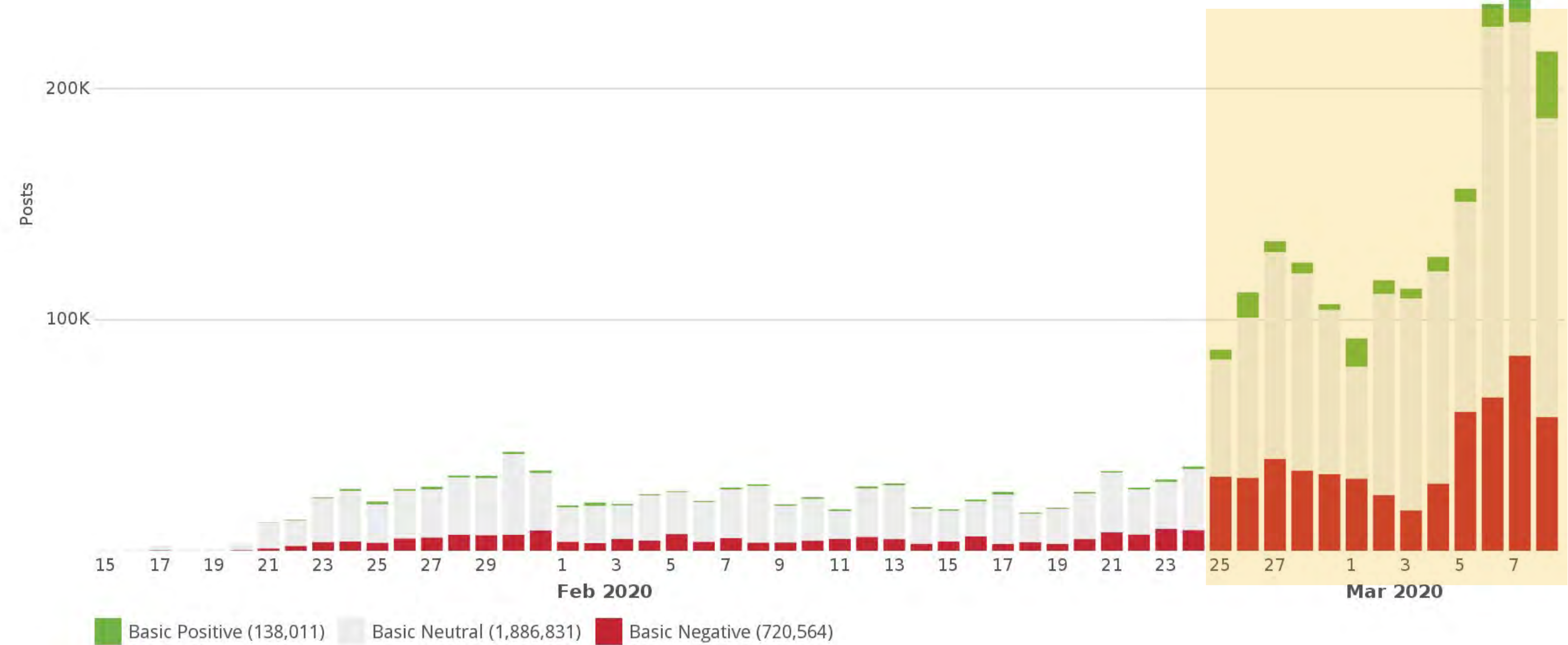
U.S. map of social conversation (darker fill is equivalent to greater volume)



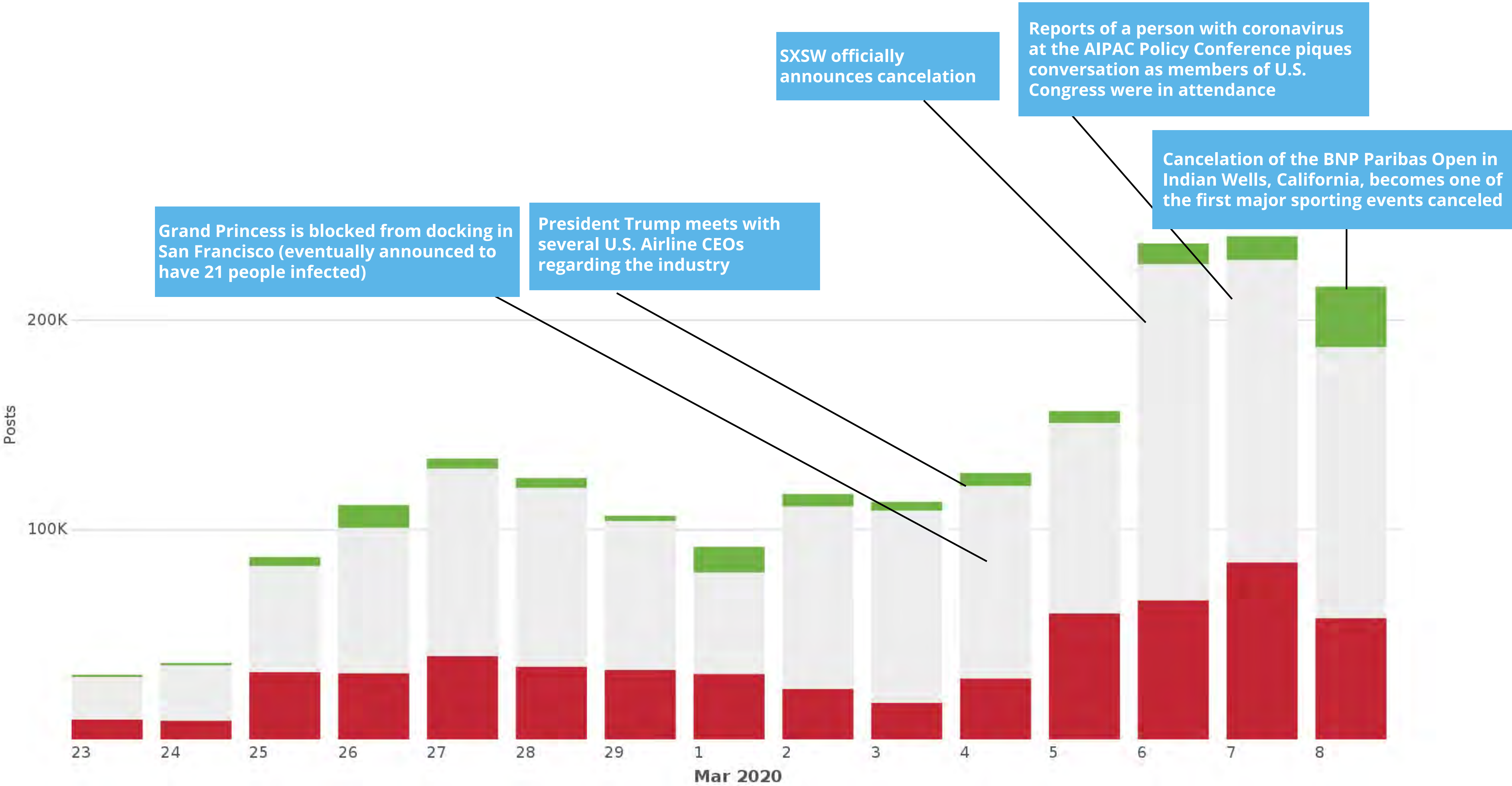
Sentiment of social conversation

TRAVEL, UNITED STATES: CONVERSATION DRIVEN BY EVENT CANCELATIONS

This chart shares the volume of U.S. social conversation from Jan. 15 to March 8 related to anything regarding COVID-19 and travel. Travel keywords feature general travel terms as well as major transportation companies (airlines, railways, cruise lines) and major events people are likely to travel to (Olympics, Final Four, festivals, conferences). The growing uncertainty surrounding travel and if events will be canceled is causing increased anxiety and expectations of easy to acquire refunds.



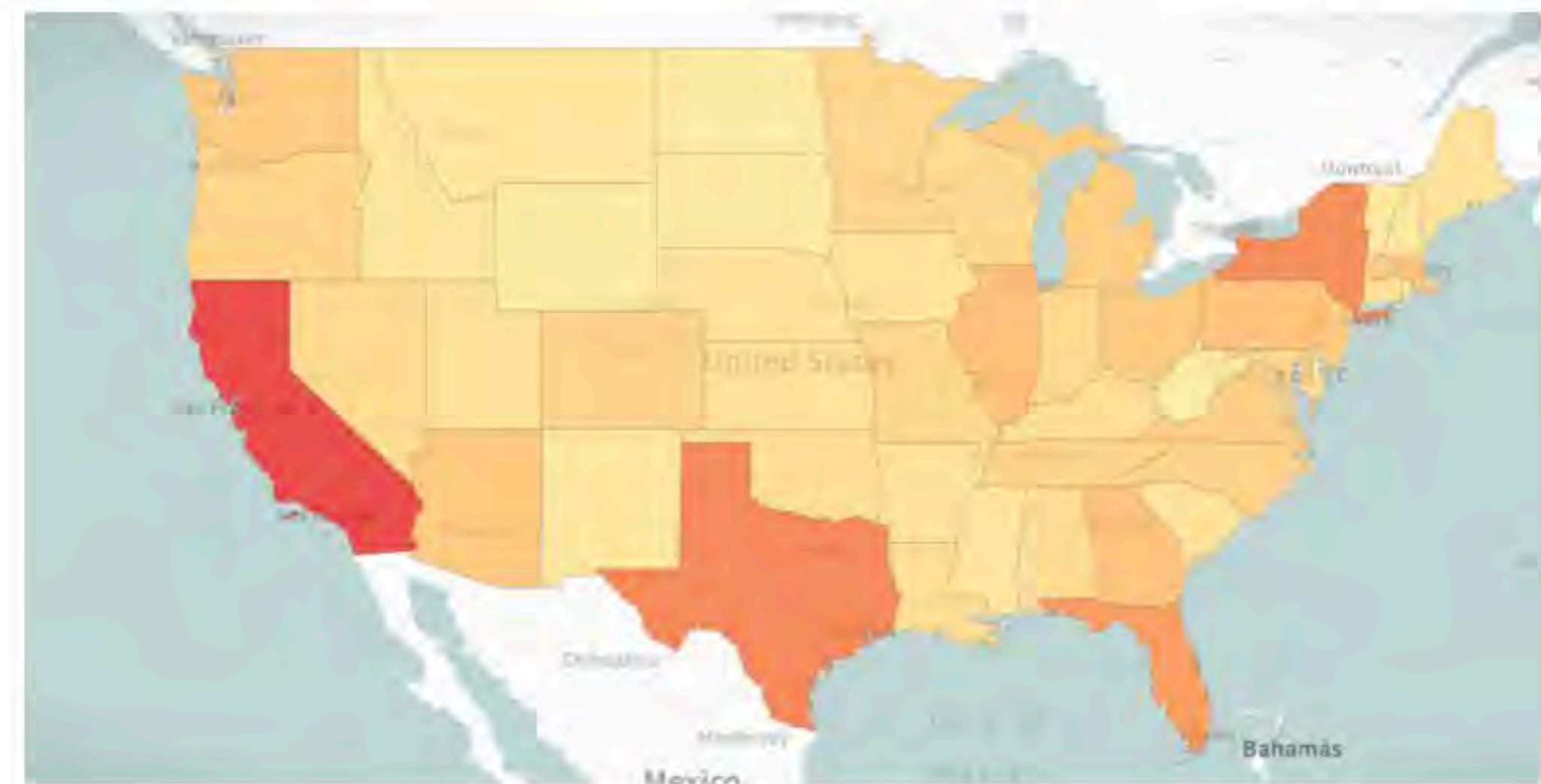
TRAVEL, UNITED STATES: FEB. 23 TO MARCH 8 TOP STORIES



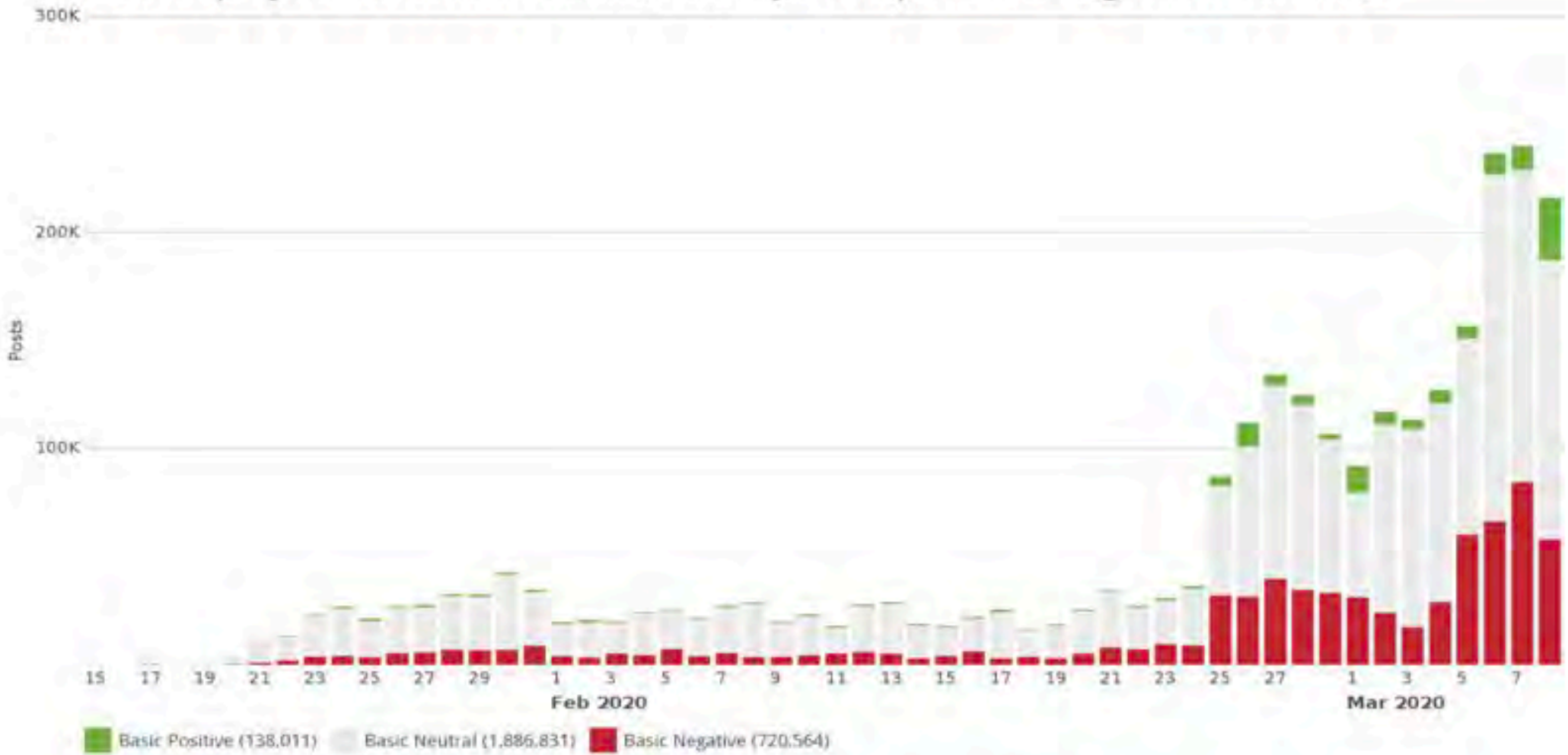
GEOGRAPHIC BREAKDOWN (TRAVEL, UNITED STATES)

State	# of Posts	Percentage of US Total Posts
California	292,955	17.29%
Texas	169,967	10.03%
New York	169,363	9.99%
Florida	130,639	7.71%
District of Columbia	66,213	3.91%
Illinois	56,541	3.34%
Pennsylvania	53,838	3.18%
Georgia	50,576	2.98%
Washington	49,102	2.90%
Massachusetts	44,845	2.65%
Ohio	42,426	2.50%
Arizona	39,989	2.36%
Virginia	39,715	2.34%
New Jersey	36,587	2.16%
Michigan	33,695	1.99%
Oregon	30,435	1.80%
Colorado	30,286	1.79%
Tennessee	28,285	1.67%
Maryland	25,396	1.50%
North Carolina	24,870	1.47%

Jan. 15 to March 8, and only posts with identifiable states within the United States. Total volume: 2,745,390 posts.

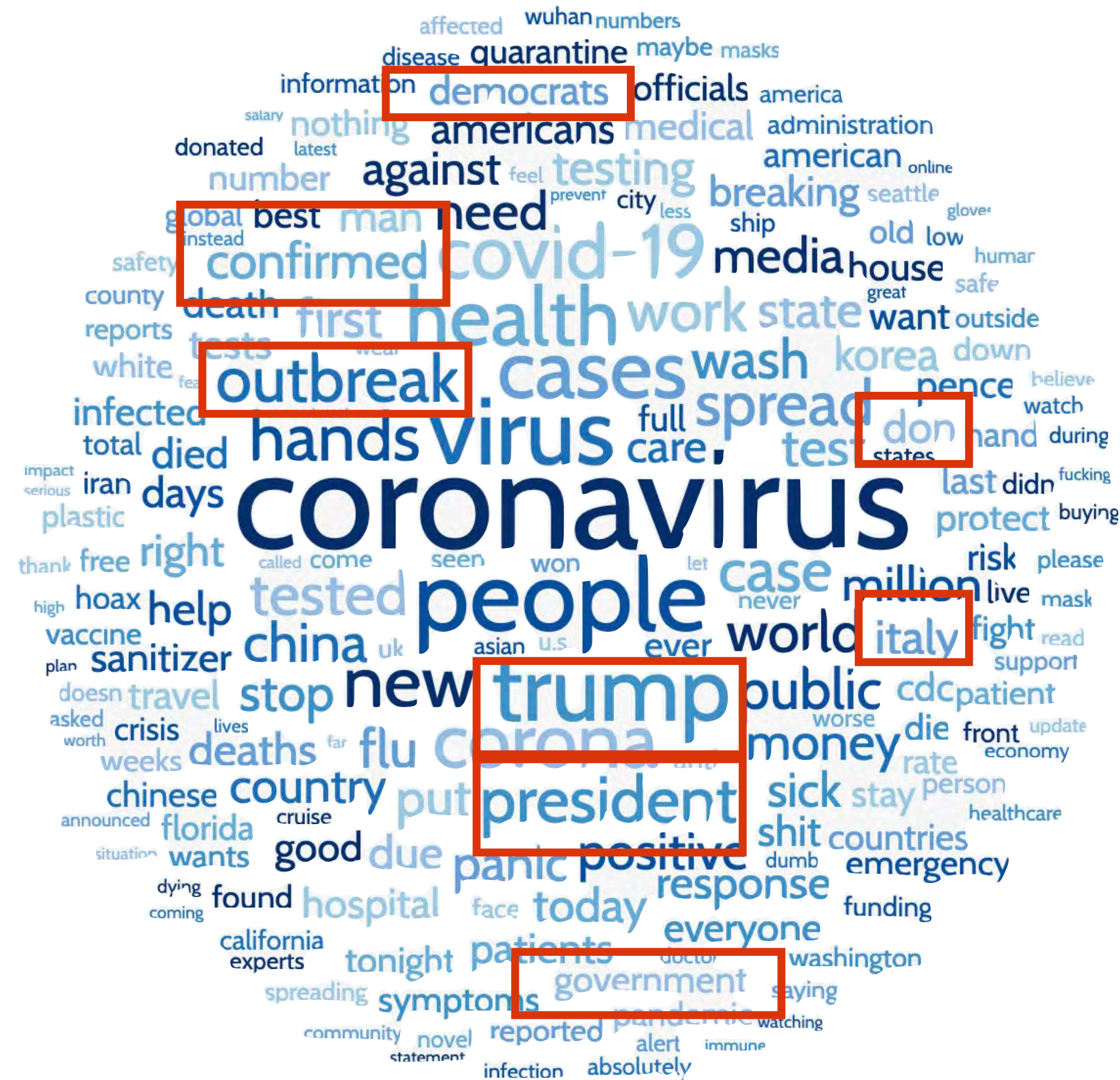


U.S. map of social conversation (darker fill is equivalent to greater volume)

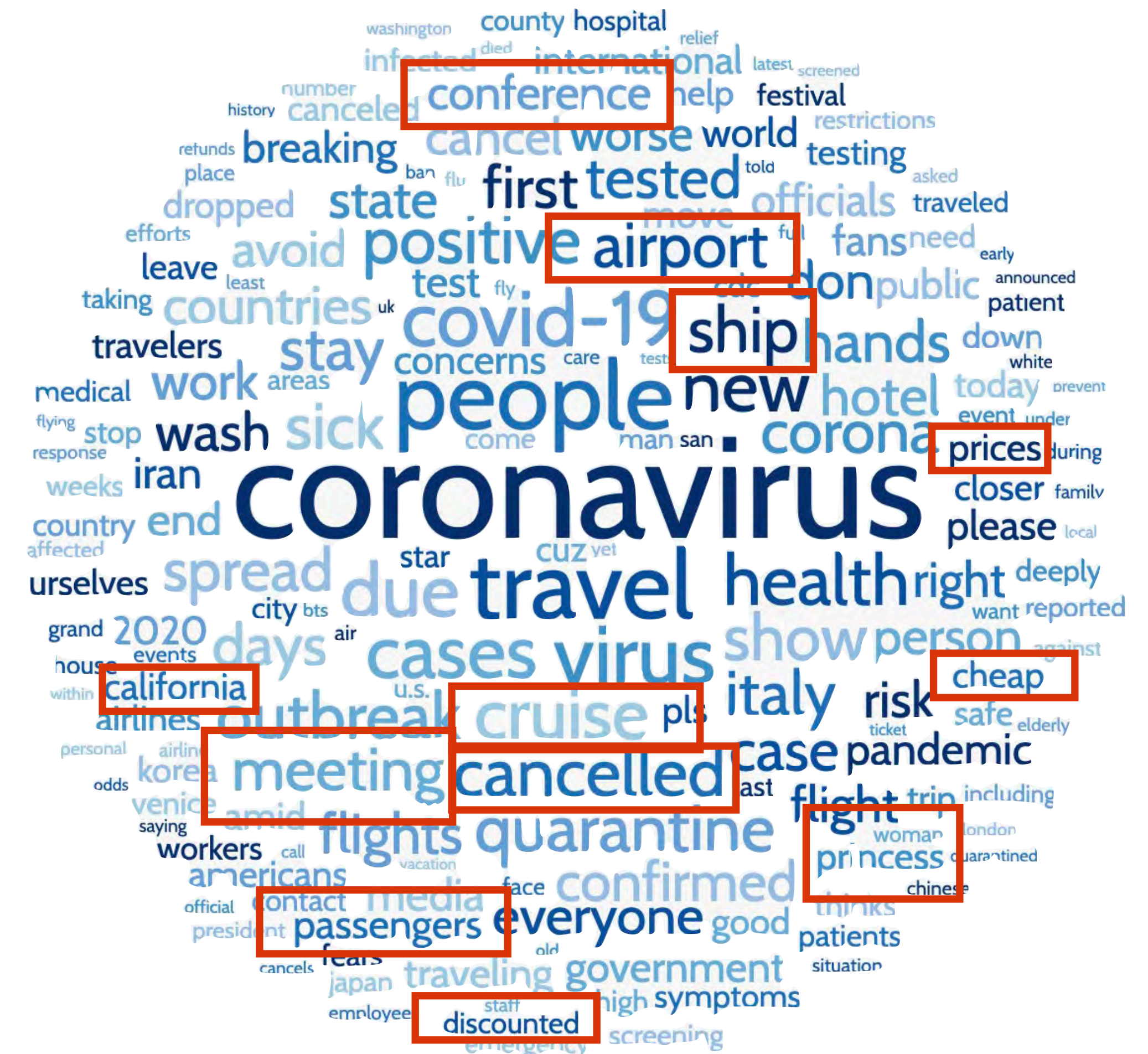


Sentiment of social conversation

SENTIMENT BREAKDOWN



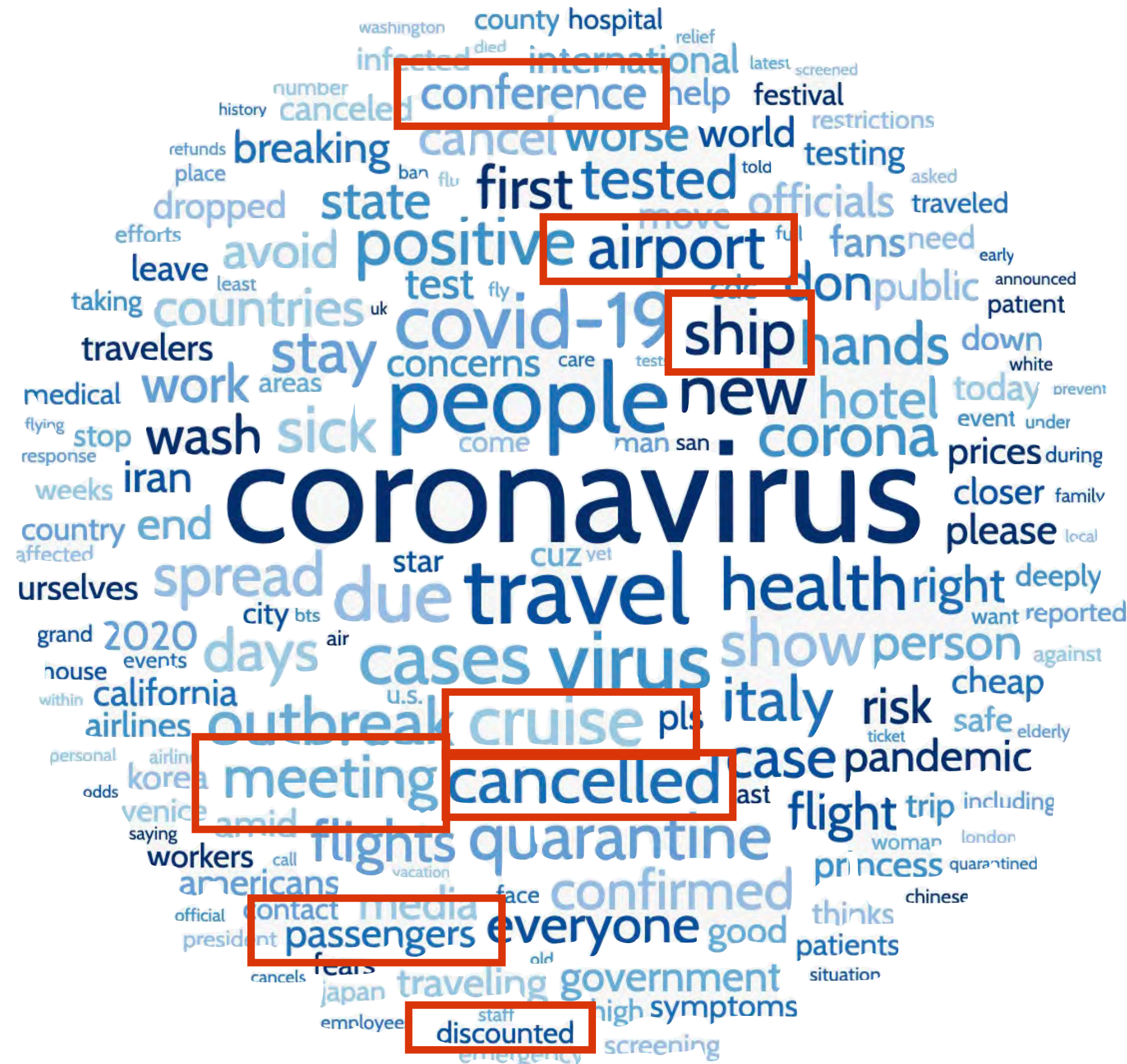
Trending words within the **overall conversation** from March 1-8



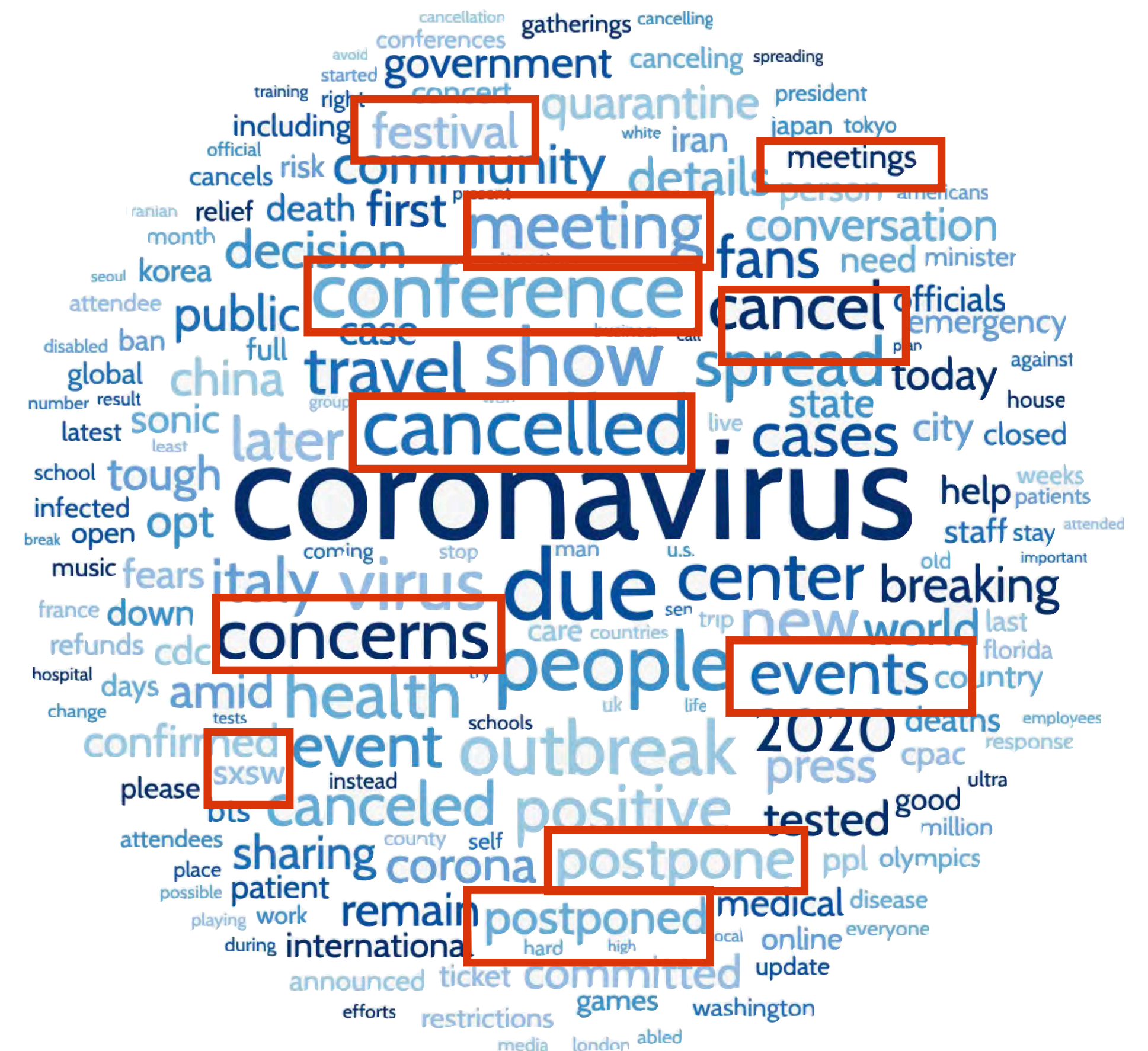
Trending words within the **travel conversation** from March 1-8

These word clouds share the trending terminology for both the overall COVID-19 conversation and the travel-related COVID-19 conversation. In the overall, news and reports take over the bulk of the cloud, with health information and politics remaining the primary topics. The travel-related word cloud demonstrates the rise in expectations of increased travel deals and discounts. This conversation continues to have strong connections to cruising.

SENTIMENT BREAKDOWN



Trending words within the **travel conversation** from March 1st - 8th 2020




Trending words within the **corporate travel + events conversation** from March 1st - 8th, 2020

These word clouds share the trending terminology for both the general travel and the corporate travel and events related COVID-19 conversations. The travel-related word cloud is seeing a rise of travel discount conversations, along with comments around the cancelations of events and the expectations of refunds. As corporations continue to change travel policies, we expect to see continued cancelations meetings, events and corporate travel.

GENERAL TRAVEL CONVERSATION SAMPLES

Conversation around cancelation is high:



Reviewed 1 week ago

You promised to full refund then please refund

Due to the china virus I have cancelled the flight and Singapore Airlines agree to full refund but it has been a month now and still no refund.... Will there ever going to be one??

Date of travel: February 2020

Thank jixinxiny

This review is the subjective opinion of a TripAdvisor member and not of TripAdvisor LLC.

Posted by u/SloanTheSloth 3 days ago

Conference cancelled because of coronavirus. Is there anyway to get my flight tickets refunded?

I'm a graduate student studying video game programming. A few months back, my classmates and I bought tickets to Game Developers Conference (GDC). It was supposed to be March 16-21 in San Francisco.

Sadly, they have now cancelled GDC, or rather "postponed till the summer" because of the coronavirus SF is also under a state of emergency because of the coronavirus.

GDC is refunding the ticket prices. We are now trying to get our airbnb and airline tickets refunded.

We called the airline (Alaska Air) and they can only give us credit back and it has to be used before December of this year. That doesn't really help us at all since we're all graduate students that won't be flying anywhere else anytime soon.

Is there anyway to get a refund since SF is under a state of emergency and all the warnings going on about the coronavirus?

Barry Schapiro, MD, FAAOS @bschapiroMD · Mar 2

I had a flight from Tampa to Ft. Lauderdale scheduled for Friday. I cancelled it and I'm gonna drive instead. It's not worth the risk. Consider eliminating unnecessary air travel.

#CoronaVirusFlorida
#CoronaVirus

4 5 39

Mr. Ease @ARTBYEASE · Mar 4

Supposed to be on a flight to Japan rn but United cancelled my trip

#coronavirus

1 7

Ryan Hodge @RyanHodge · Mar 3

Legit just cancelled my trip to NYC. #Coronavirus

14 3 26

But not everybody is canceling travel:

air @ayoair · Mar 6

The media: "CORONAVIRUS PANDEMIC IS GETTING WORSE EVERYONE PLS WASH UR HANDS AND QUARANTINE URSELVES DON'T MOVE WE'RE GETTING CLOSER TO THE END"

Millennials on our way to the airport cuz flight prices dropped:



0:00 4.9M views

1.4K 108.5K 522K

Kevin Harden, Jr. @KHJ_Esq · Mar 7

Coronavirus got Boomers stocking their doomsday bunkers... meanwhile millennials are online shopping for bathing suits for the five island trip they just booked on Spirit for \$130.

1.1K 85.1K 513.8K

Ben Dreyfuss @bendreyfuss · Mar 2

A lot of cheap flights right now, and part of me thinks, if im going to get the coronavirus, I might as well get it in a deeply discounted 5 star hotel in Venice

1.4K 55K 404.1K

jas @jasssmathers · Mar 7

The corona virus made flights so cheap i think it's finally time to start traveling. Lmaooooo. I'm here for a good time not a long time.

189 36.8K 159.8K

Cancelation conversation increased 36% week over week with a volume of conversation of 239,012 posts. As more events are canceled or postponed, we expect this conversation to only increase. However, there is also a growing volume of conversation surrounding the travel deals available due to COVID-19. This conversation increased by 167% week over week with a volume of conversation of 76,665 posts, of the posts indicating emotion in this set 72% are joyful.

CORPORATE TRAVEL + EVENTS CONVERSATION SAMPLES

Speakers pulling out of conferences / "leading the way":

**Barbara Dunkelman** @bdunkelman · Mar 5
It is with an extremely heavy heart that I announce that I will no longer be attending ECCC. Unfortunately due to ongoing COVID-19 concerns and company policies put in place for our safety, I am unable to make it - but hoping to come to Seattle for another event as soon as I can!


**Emerald City Comic Con** @emeraldcitycon · Mar 5
In our efforts to be fully transparent for the fans & keep you up to date, we've created this list to help you plan. Our website is updating in real time as we learn more, but rest assured there is still plenty to enjoy at #ECCC2020
See more at EmCity2020.com/ShowUpdates


Risk of "getting stuck":


**Jenny Chase** @solar_chase
I cancelled an international business trip planned for this week because of #CoVid19 and you all know it's ok to do that, right.


**Jenny Chase** @solar_chase · Mar 1
Replying to @solar_chase
The personal risk is higher of becoming stuck in quarantine/ isolation in a foreign country, one of an increasing number in a similar situation, with flights home being cancelled and logistics breaking down. (2/n)

Travelers are not "attached" to business trips:

**Tv Party** @TvPartyPunk · Mar 7
My business trip to Chicago was canceled today due to the #Coronavirus I don't think that it was necessary but so be it.

**Quaker Nana** @QuakerNana · Mar 6
My son has been on a business trip in Germany. He comes back home to Maryland tomorrow late. Will be a relief. #COVID19

**Alexander Higgins - Coronavirus Updates** @kr3at · Mar 6
Germany reports 92 new cases bringing total confirmed cases there to 670, with 125 new cases reported today.
#CoronaVirus #Covid19 #CoronaVirusOutbreak

**Alena Bubniak** @abubniak · Mar 5
Just to show you how serious they are about this in #seattle. Office completely empty. I've cut my trip short to fly back to NY tomorrow. #coronavirus #corona @ Downtown Bellevue [instagram.com/p/B9W6Fh4gc4U/...](https://www.instagram.com/p/B9W6Fh4gc4U/)

Given the conference and event cancelations throughout this time period, Google I/O, F8, GDC and SXSW, much of the conversation revolves around logistics: refunds, travel cancelations, and questions about public policies. Twitter is the leading platform in the conversation. Frustration and sadness are the prominent emotions associated with the cancelations or changes of these large scale events. Whereas, relief is exhibited as business travel is limited due to the anxiety of quarantine or getting stuck away from home.

OUR POINT OF VIEW

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OUR POINT OF VIEW

WHAT WE ARE SEEING

- Volume of conversation and negative sentiment related to COVID-19 and travel are increasing
- Corporate travel changes are a significant impact on conversation
- Flexible cancelation policies and travel deals are getting people to book travel or consider travel
- Age groups in the U.S. are reacting differently to canceling travel

WHAT THIS MEANS / COULD MEAN

- The impact on leisure travel has yet to happen
- DMOs need to work with hotels on deals and flexible cancelation policies
- Marketers need to consider segmenting by age groups, marketing travel to those reported to be at less risk and therefore less adverse

NEWS HEADLINES FROM MARCH 10 (UNITED STATES)

THE SITUATION IS FLUID

The U.S. lags several other countries in the severity and response of the coronavirus outbreak.

But even in the U.S., the situation is changing day by day, impacting social sentiment.

This and the following slide show some of the headlines from March 9-10 in the U.S. and for international markets.

We recommend DMOs pay close attention to countries like Italy, Germany or Korea.

We also strongly recommend U.S. DMOs to monitor the situation in U.S. regions that were affected first, e.g., King County, Washington.

Pence says task force discussed recommending additional travel advisories

Coronavirus: New York Creates 'Containment Area' Around Cluster In New Rochelle

March 10, 2020 · 2:17 PM ET

Top US health official: Americans "can't be doing the kinds of things we were doing a few months ago"

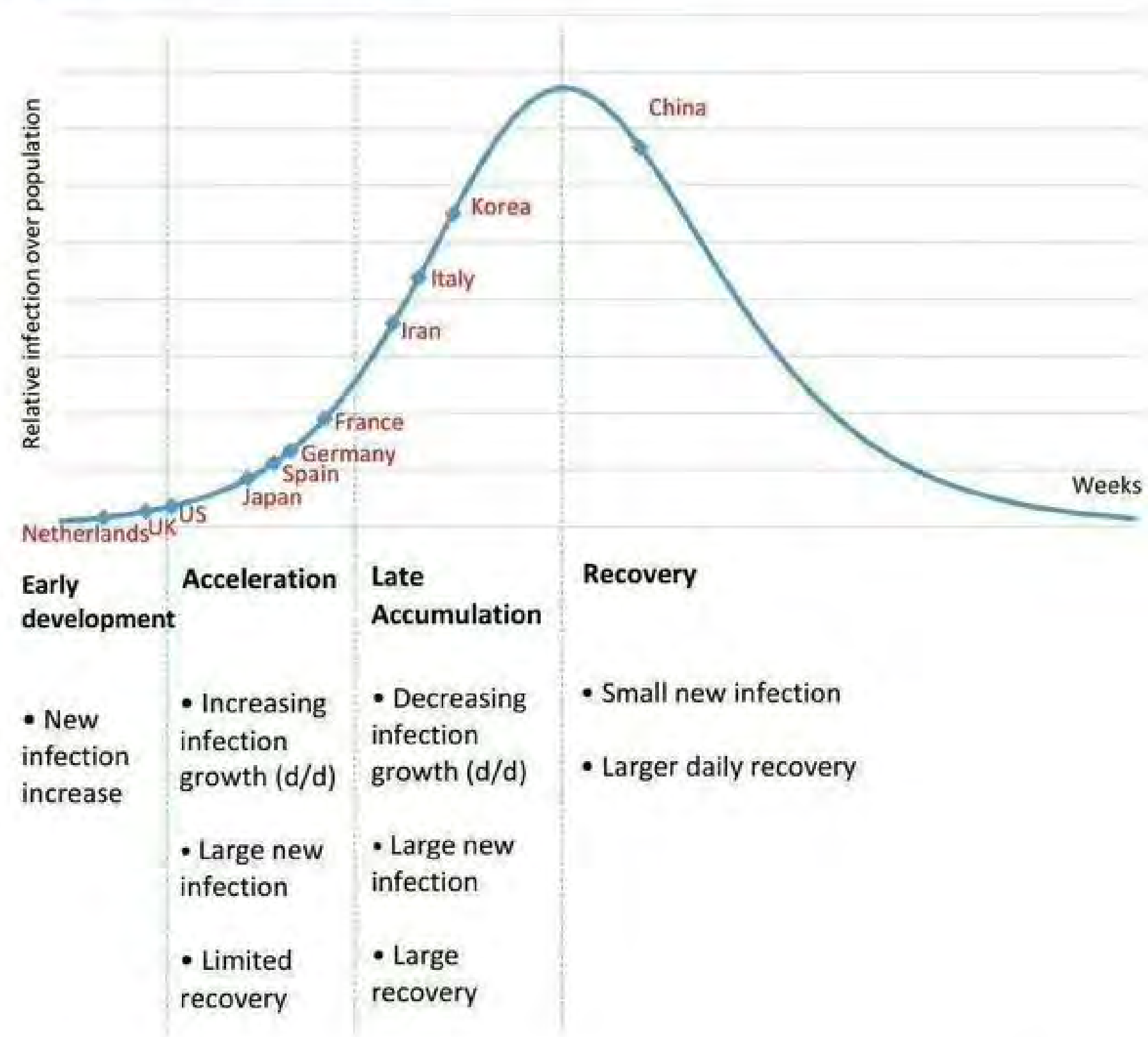
CDC virus travel advisory squelched, official says

by MIKE STOBBE The Associated Press | March 9, 2020 at 3:47 a.m. | Updated March 9, 2020 at 3:47 a.m.

Coachella, Influential Music Festival, Is Postponed Amid Virus Fears

NEWS HEADLINES FROM MARCH 9-10 (INTERNATIONAL)

Figure 2: COVID-19: Schematic chart



Source: J.P. Morgan

Italy Expands Quarantine Measures Nationwide To Stem Spread Of Coronavirus

March 9, 2020 · 6:55 PM ET

GERMAN LEAGUE CANCELS SEASON, WON'T CROWN CHAMPION AS A RESULT OF CORONAVIRUS OUTBREAK

Norwegian Air Shuttle canceling 3,000 flights, temporarily laying off workers due to coronavirus

Published: March 10, 2020 at 8:25 a.m. ET

France bans gatherings of more than 1,000 people to contain coronavirus

Angela Merkel estimates that 60% to 70% of the German population will contract the coronavirus

China's coronavirus outbreak has 'passed its worst,' says UBS

PUBLISHED TUE, MAR 10 2020·9:46 PM EDT

WHAT YOU SHOULD BE THINKING ABOUT

SOURCE MARKETS



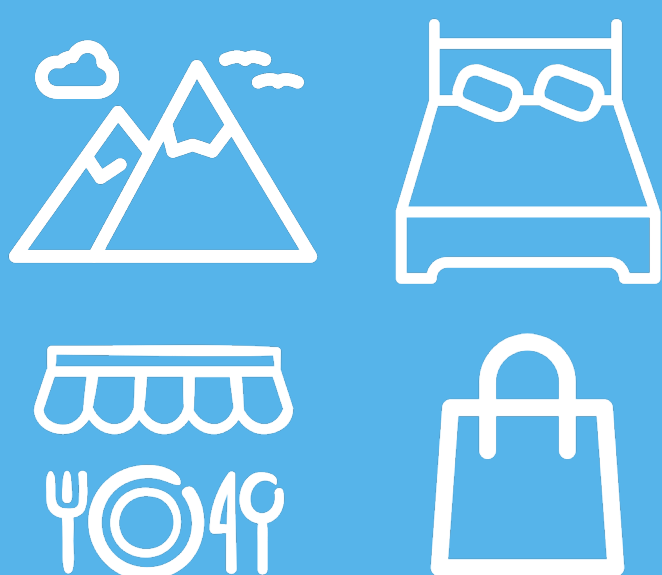
Where do your customers live?

TRANSPORTATION



How do they or can they get to your destination?

DESTINATION



What can they do in-destination?

EVENTS



What can they do in-destination?



WHAT WE'RE WATCHING

WHAT ARE REGIONAL DIFFERENCES?

- What are people saying in key source markets vs. in-destination?
- What are people saying about a destination vs. its competitive set?
- Are travelers choosing to still travel but staying closer to home, e.g., road trips?

WHAT CAN WE LEARN FROM CANCELED EVENTS

- What are the conversations around canceled events like SXSW?
- How long are people upset?
- What they are saying in relation to the event vs. the destination?

HOW DO WE NEED TO STAFF AND EMPOWER COMMUNITY MANAGERS?

- What questions are people asking?
- What is happening in or can be learned from more impacted communities?

WHO ARE OUR BEST SUPPORTERS? WHO ARE OUR DISTRACTORS?

- Who is advocating for a destination?

WHEN ARE PEOPLE READY FOR A 'NEW NORMAL?'

- Can DMOs continue to market? Does the message need to change?

The State of the American Traveler: Destinations Edition

Research, slides and other resources will be available at
www.milespartnership.com/SAT
www.destinationanalysts.com



Crisis Communication Tips

- WTTC Crisis Readiness
- UNWTO Toolbox for Crisis Communications
- Destinations International Crisis Communication Toolkit

www.milespartnership.com/SAT



CRISIS READINESS

ARE YOU PREPARED AND RESILIENT TO
SAFEGUARD YOUR PEOPLE & DESTINATIONS?



GLOBAL *rescue*

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Final Takeaways for Attention & Action

- **Fast & Flexible** – events are highly fluid, be ready to respond quickly
- **Facts Not Fear** – focus on amplifying expert, independent information
- **Show Leadership** – be an advocate for travel & a catalyst for collective action
- **Reduce Risk** – work with businesses to offer complete cancellation & refund policies
- **Travel Local** – look to activate locals & drive markets, build stronger connections with residents
- **Long Term View** – despite short disruption, demonstrate commitment to your key markets
- **Step Change** – opportunity to reshape your organization: its role, focus, capabilities, funding etc.

Q&A

Thank you

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