

DEPARTMENT OF TOURISM AND CULTURAL AFFAIRS

Snapshot of Industry and Health Sentiment



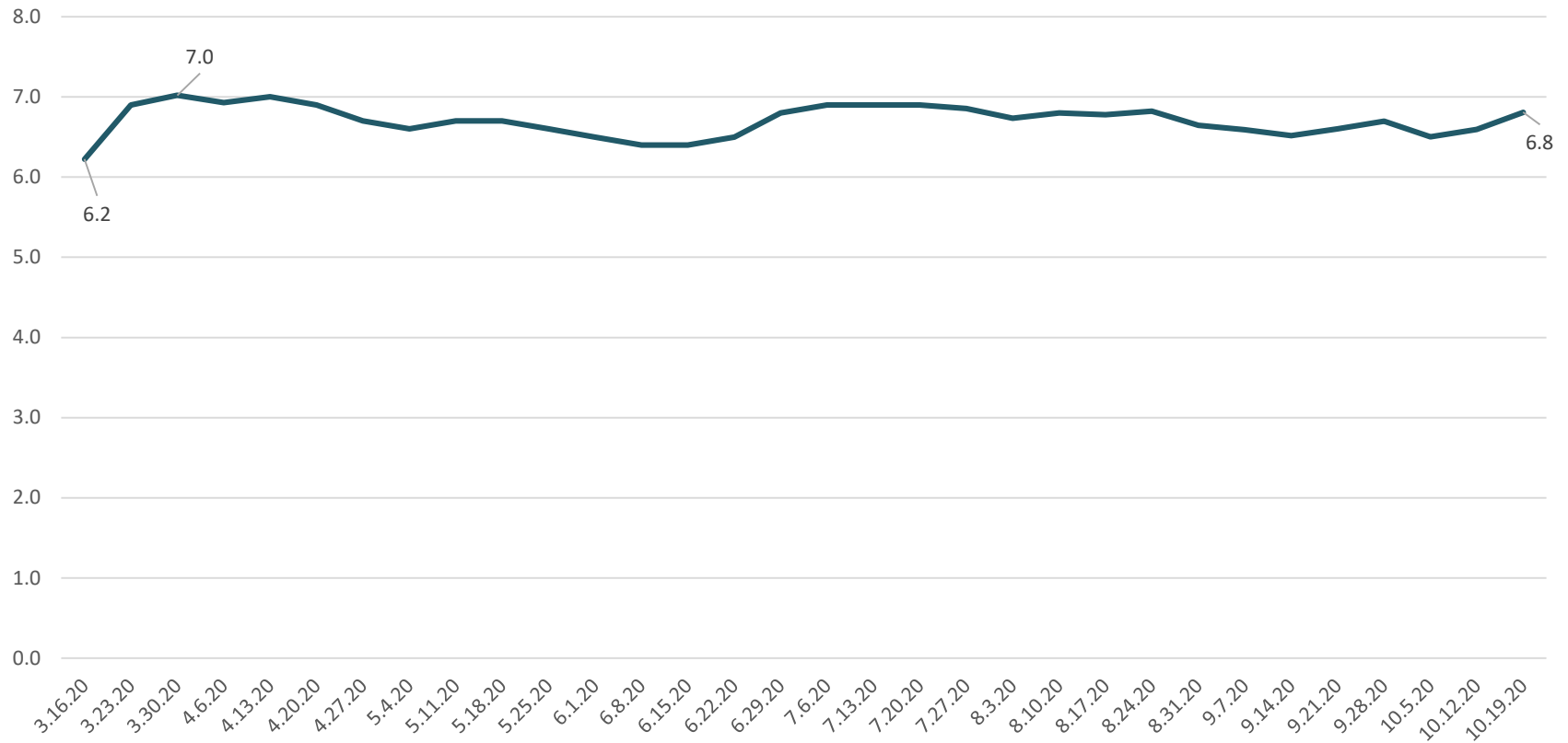
TRAVELNEVADA.COM

TRAVELER SENTIMENT

Concern about contracting virus

Data source: Destination Analysts

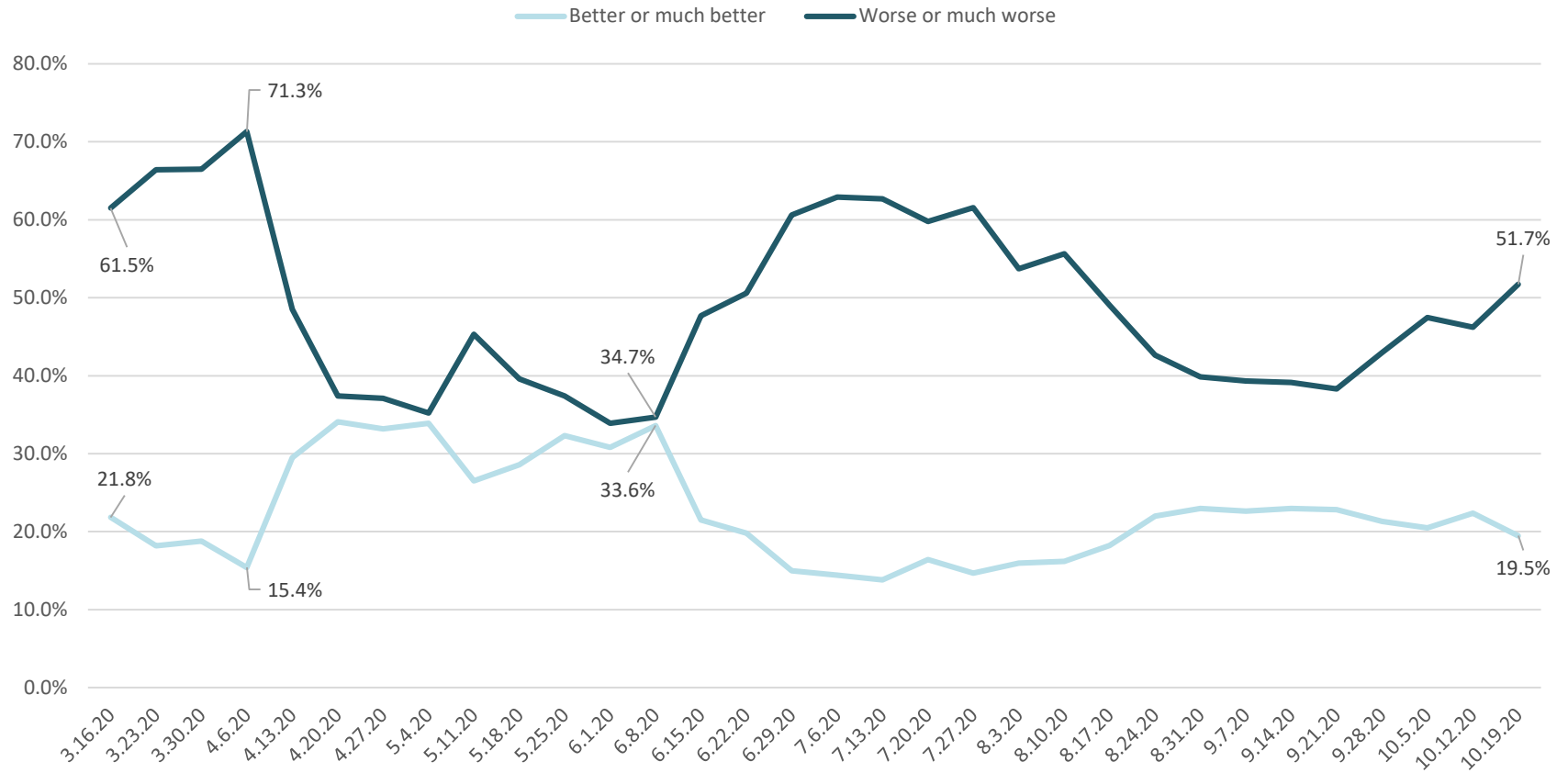
Thinking about the current coronavirus situation, in general, how concerned are you personally about contracting the virus? (0 = not at all concerned; 10 = extremely concerned)



COVID Severity Sentiment

Data source: Destination Analysts

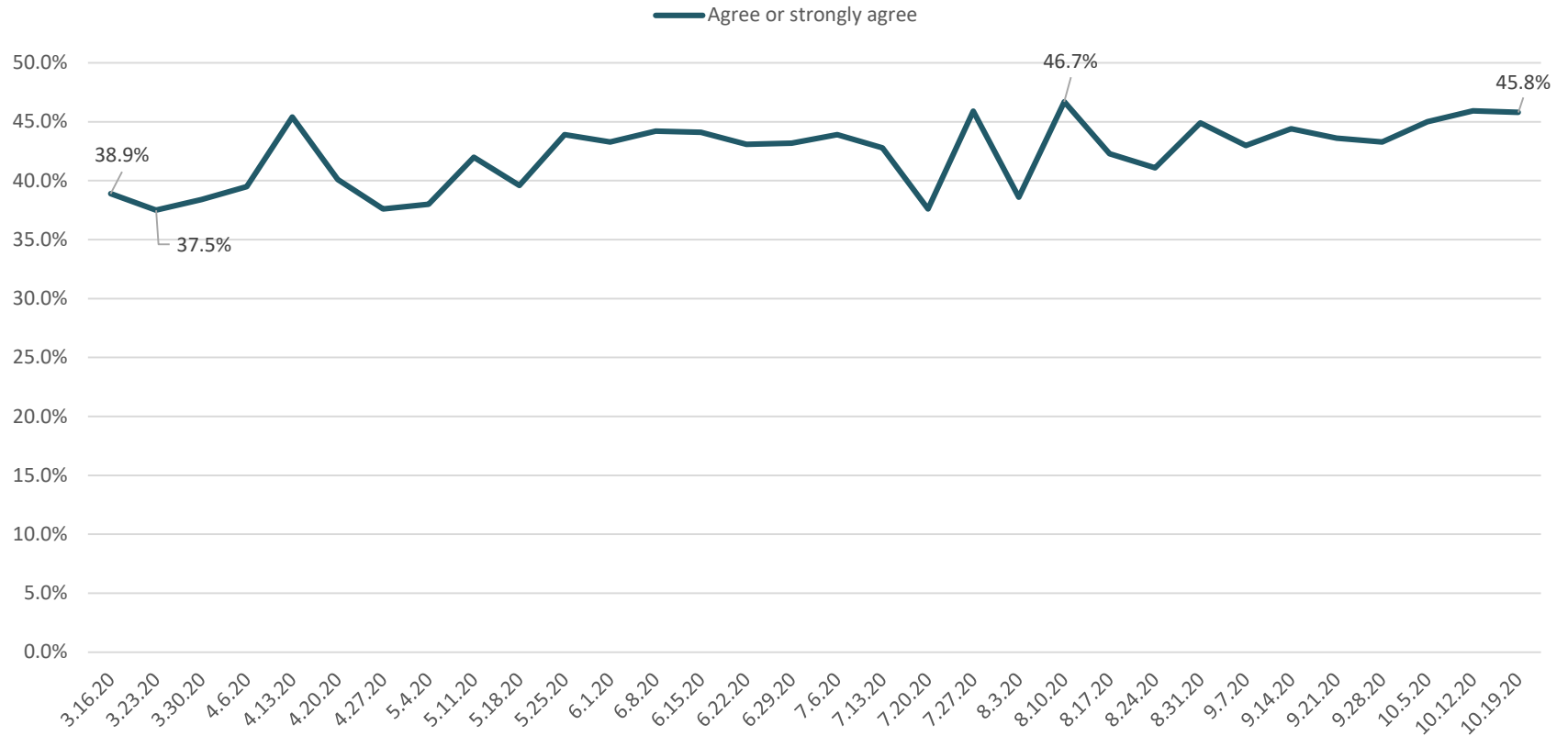
In the next month, how (if at all) do you expect the severity of the coronavirus situation in the US to change?



Road Trip Sentiment

Data source: Destination Analysts

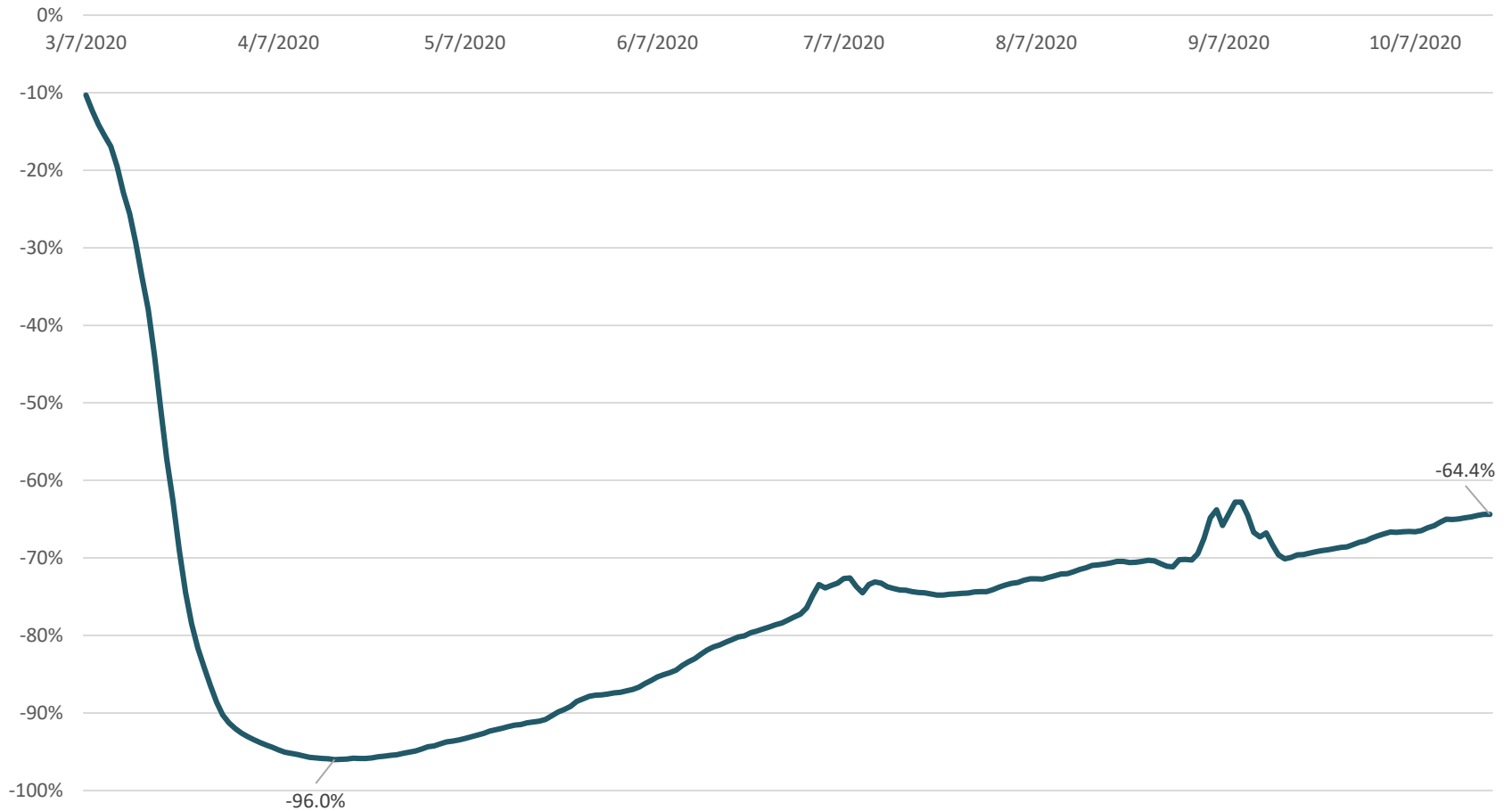
Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel



TSA Checkpoint Travel

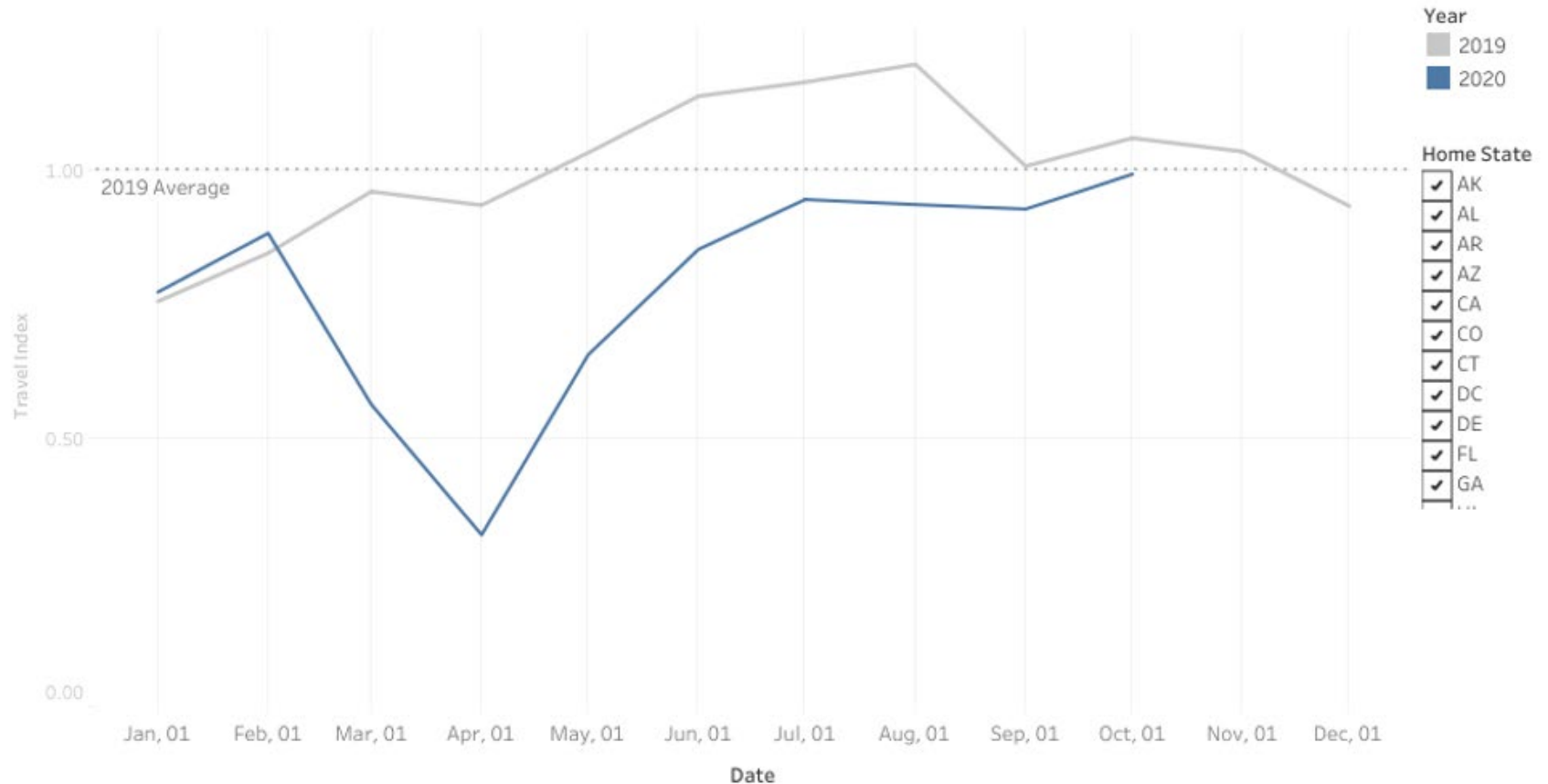
Data source: Transportation Security Administration

TSA Checkpoint Declines - 7 day average



Road Trip Travel

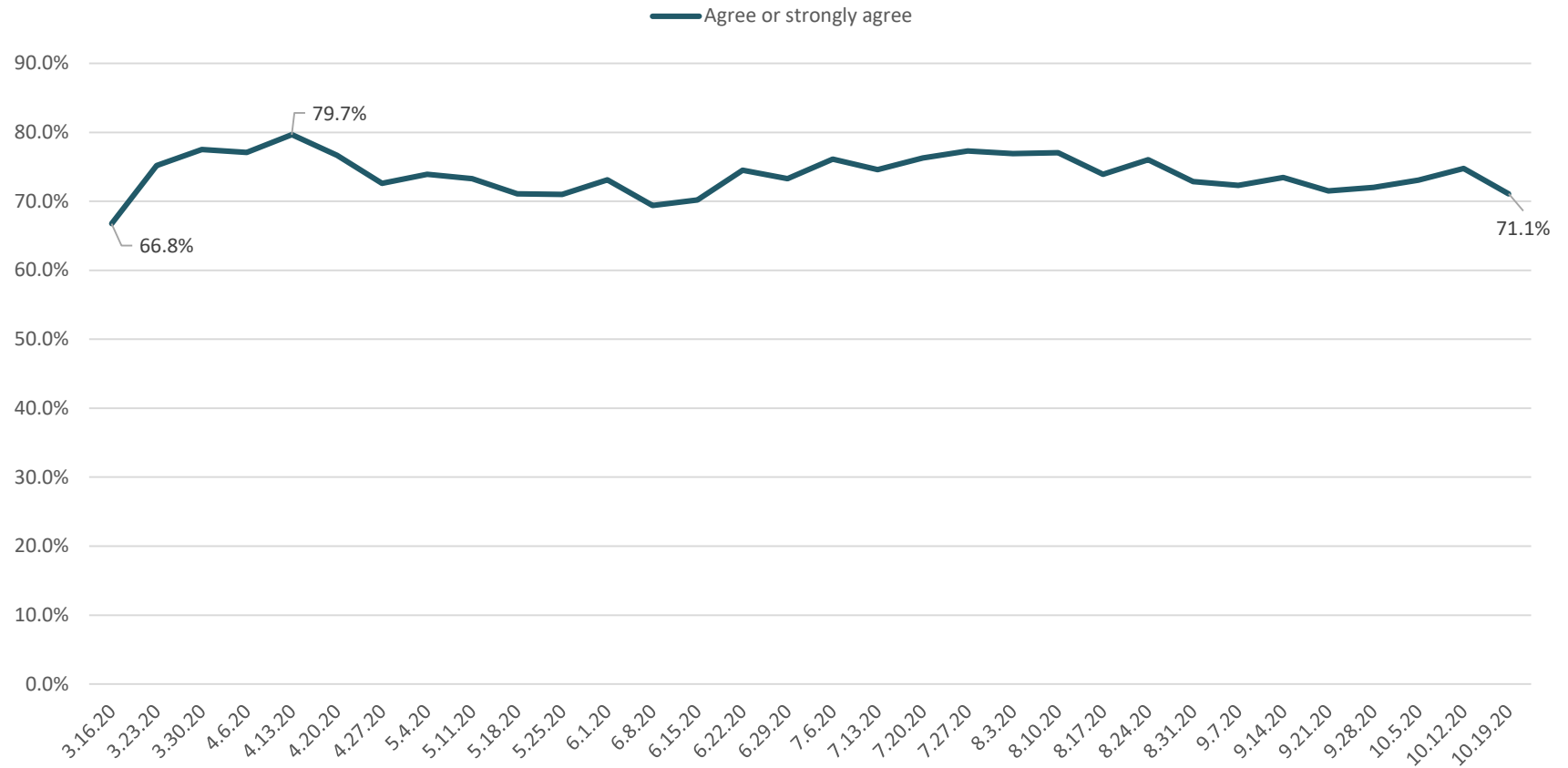
Source: Arrivalist – Daily Travel Index



Conference Sentiment

Data source: Destination Analysts

I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved



Data source: Destination Analysts

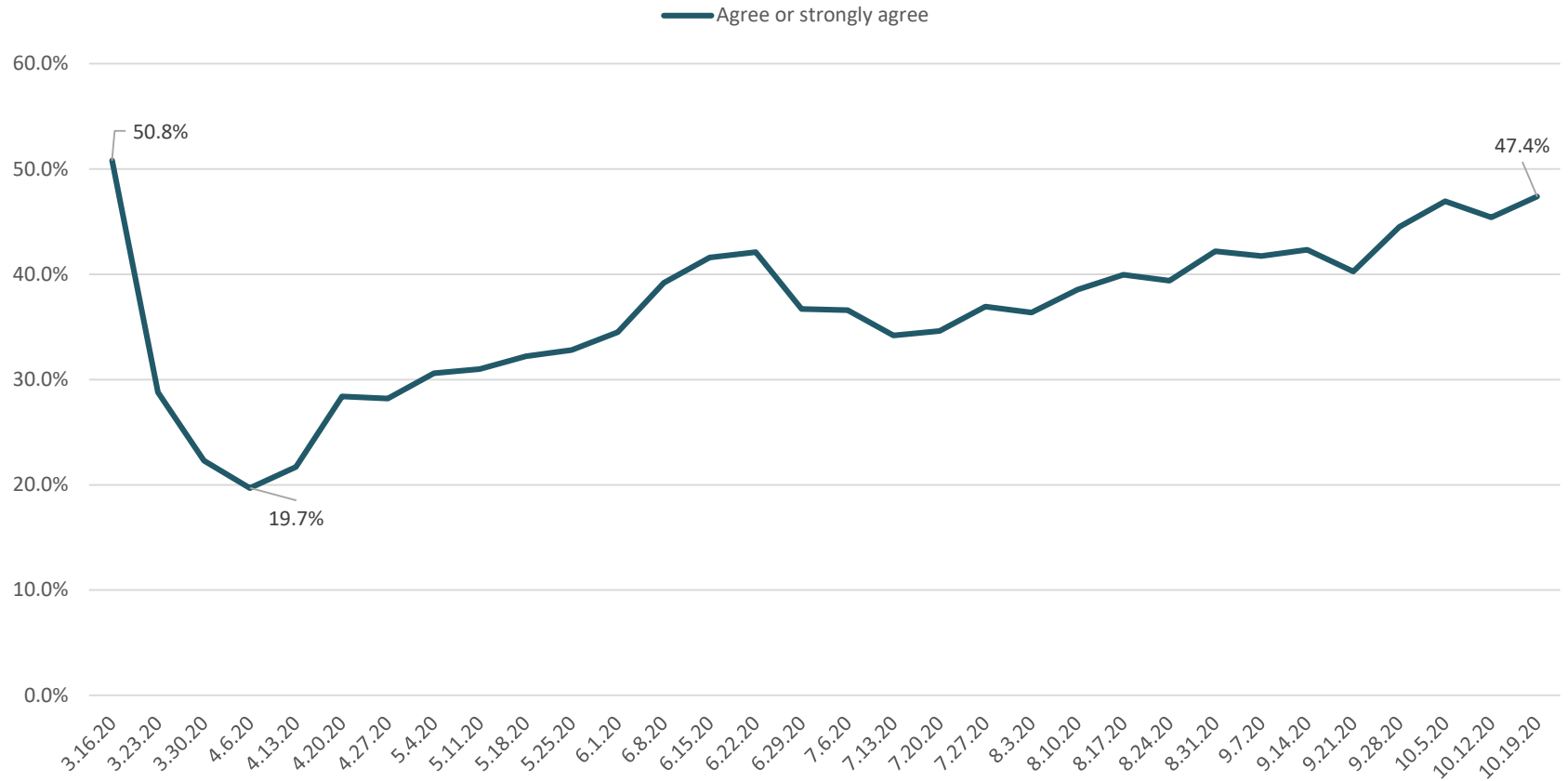
April



Comfort in Community

Data source: Destination Analysts

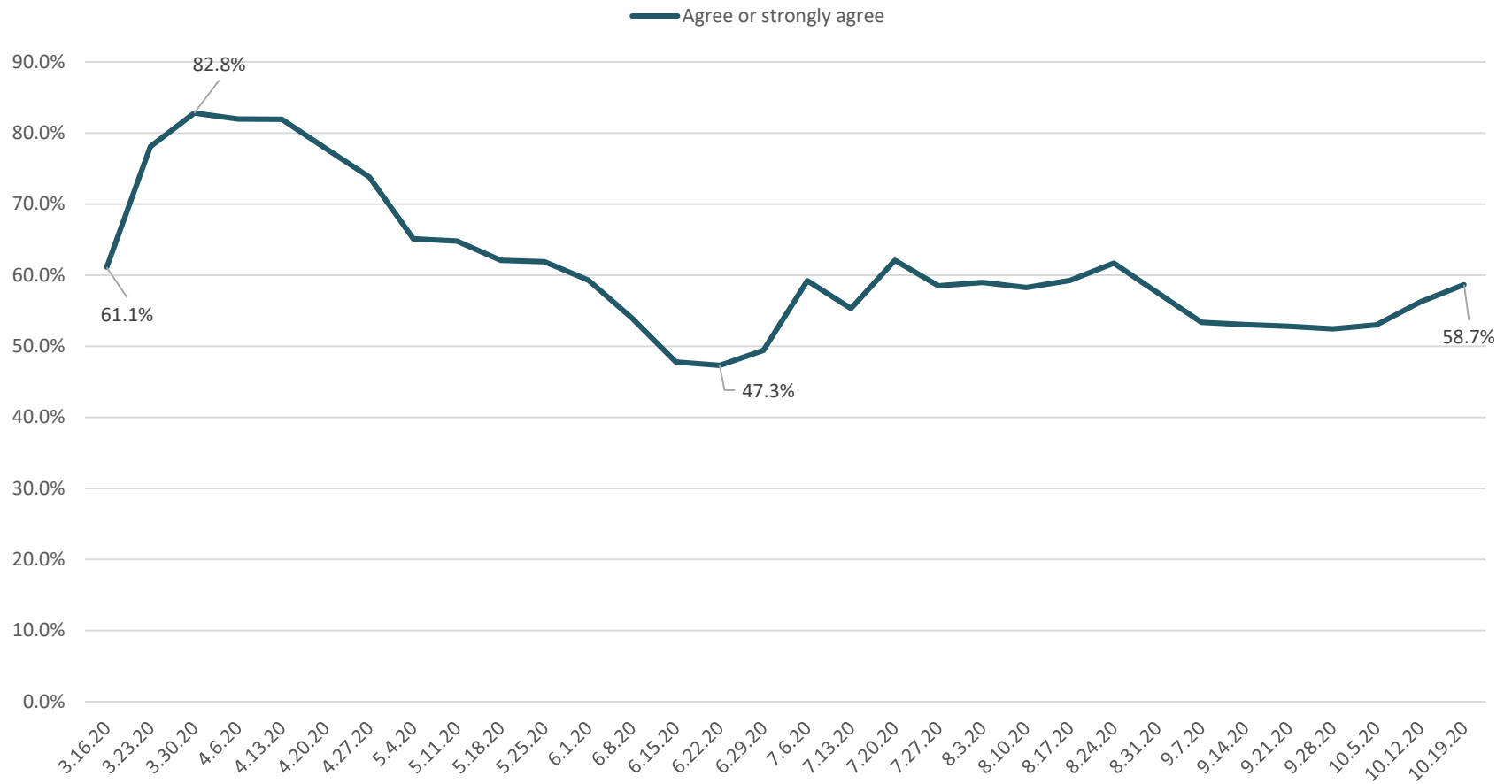
I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities



Avoiding Travel Sentiment

Data source: Destination Analysts

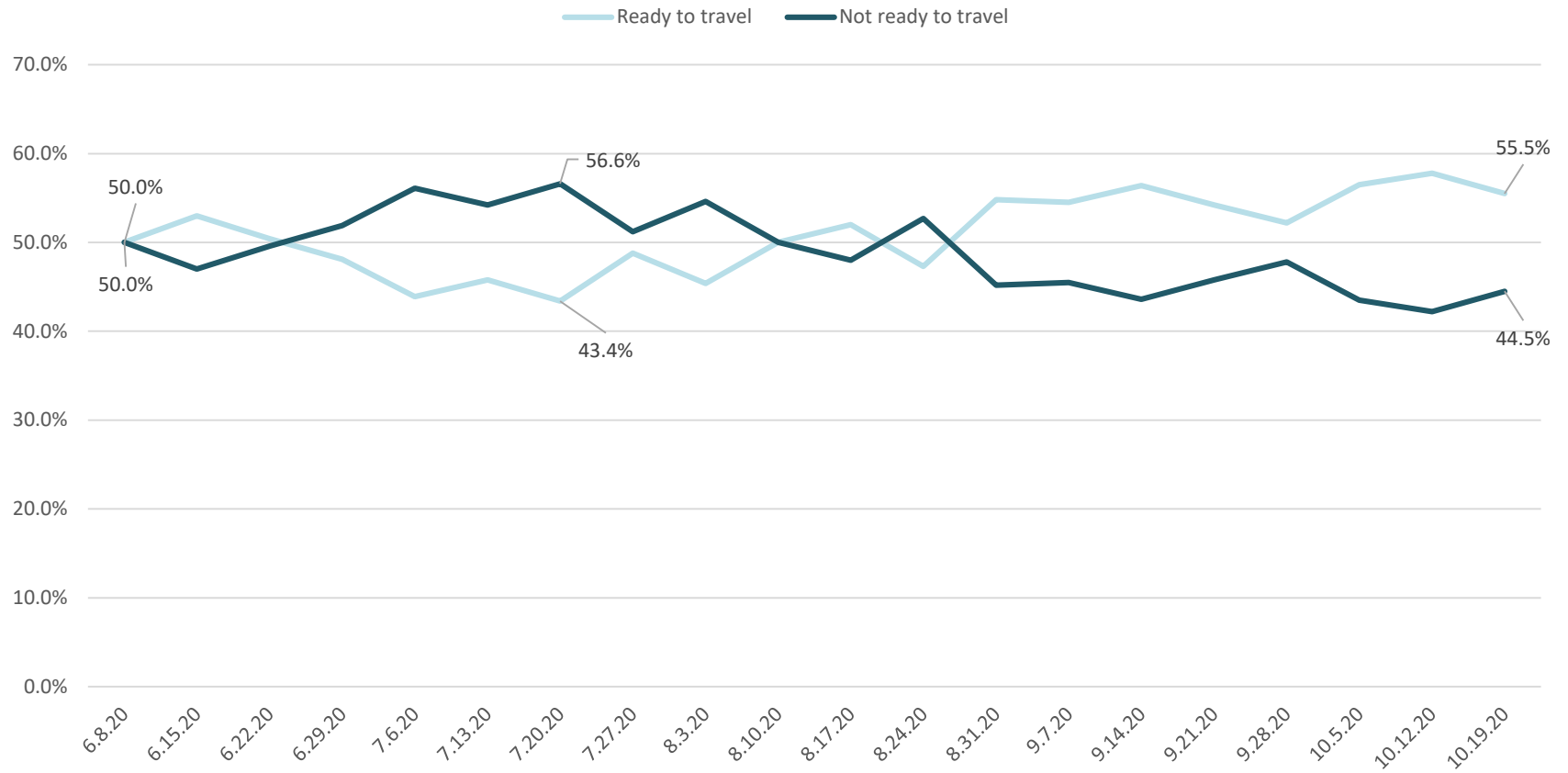
I'm planning to avoid all travel until the coronavirus situation is resolved



Travel Mindset

Data source: Destination Analysts

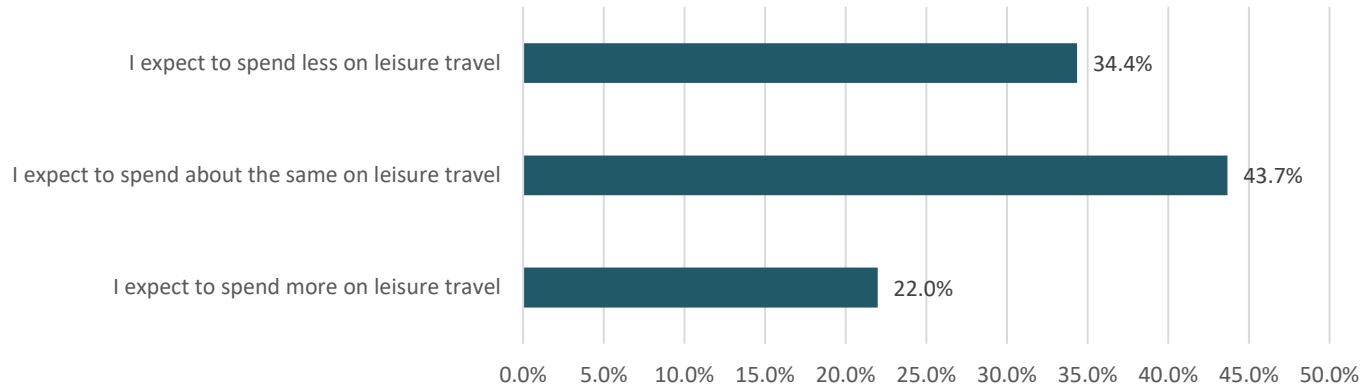
When it comes to getting back out and traveling again, which best describes your current state of mind?



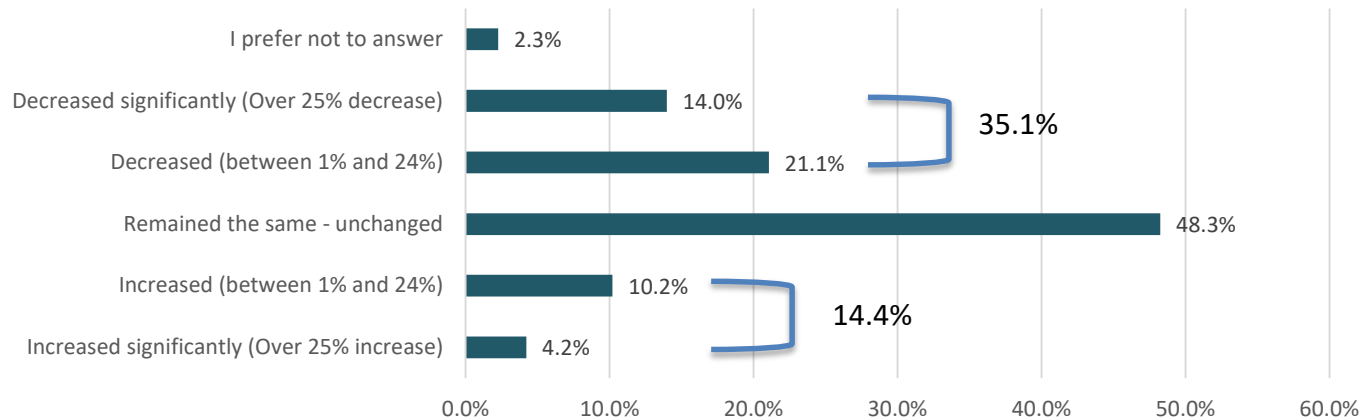
Travel Spending Sentiment

Data source: Destination Analysts

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?



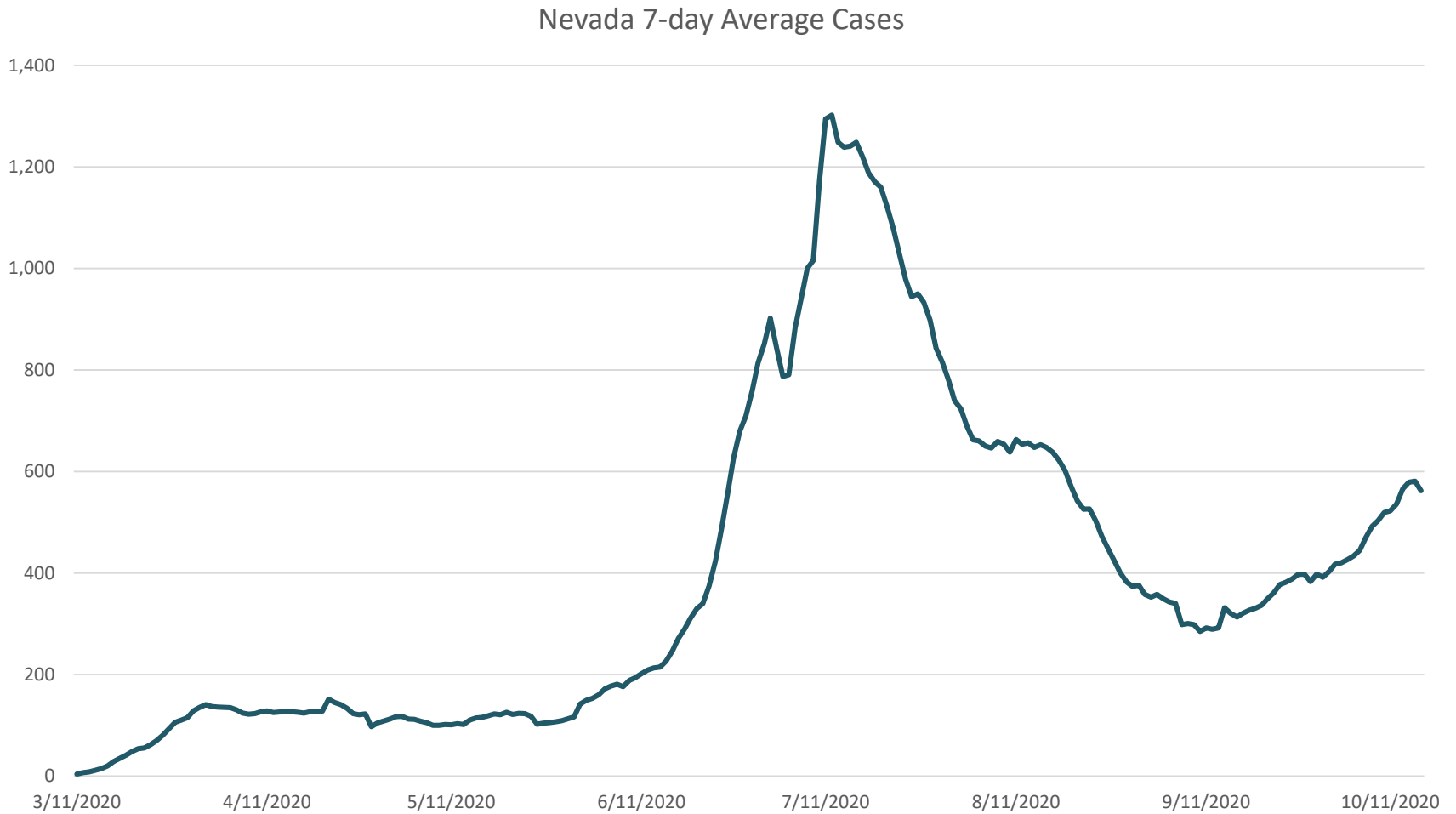
In what way (if any) has the Coronavirus situation impacted the amount of disposable incomes your household has to spend on travel?



NEVADA HEALTH AND VISITATION STATISTICS

Nevada COVID Cases

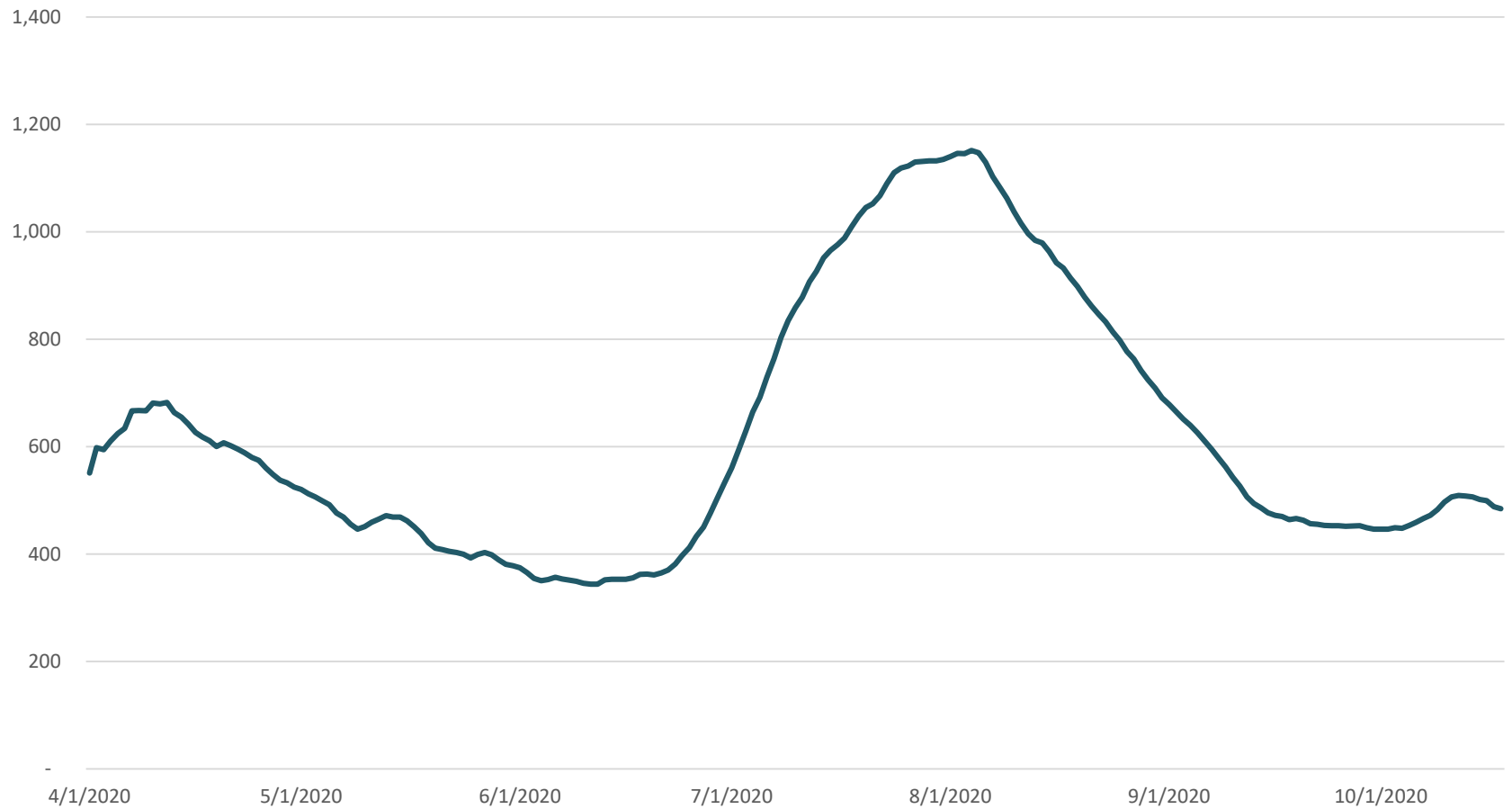
Data source: Nevada Department of Health and Human Services



Nevada COVID Hospitalizations

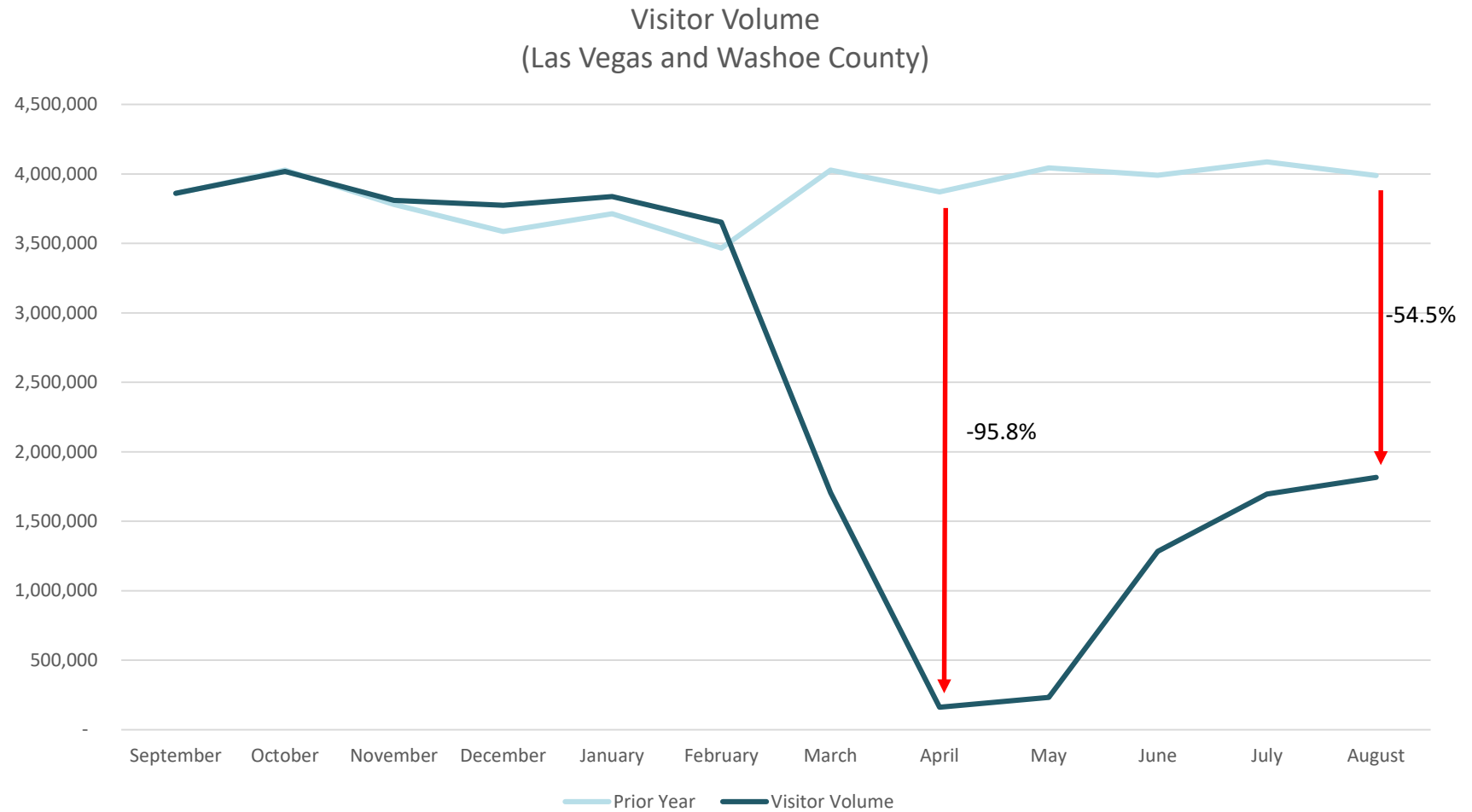
Data source: Nevada Department of Health and Human Services

Nevada 7-day Average Hospitalizations



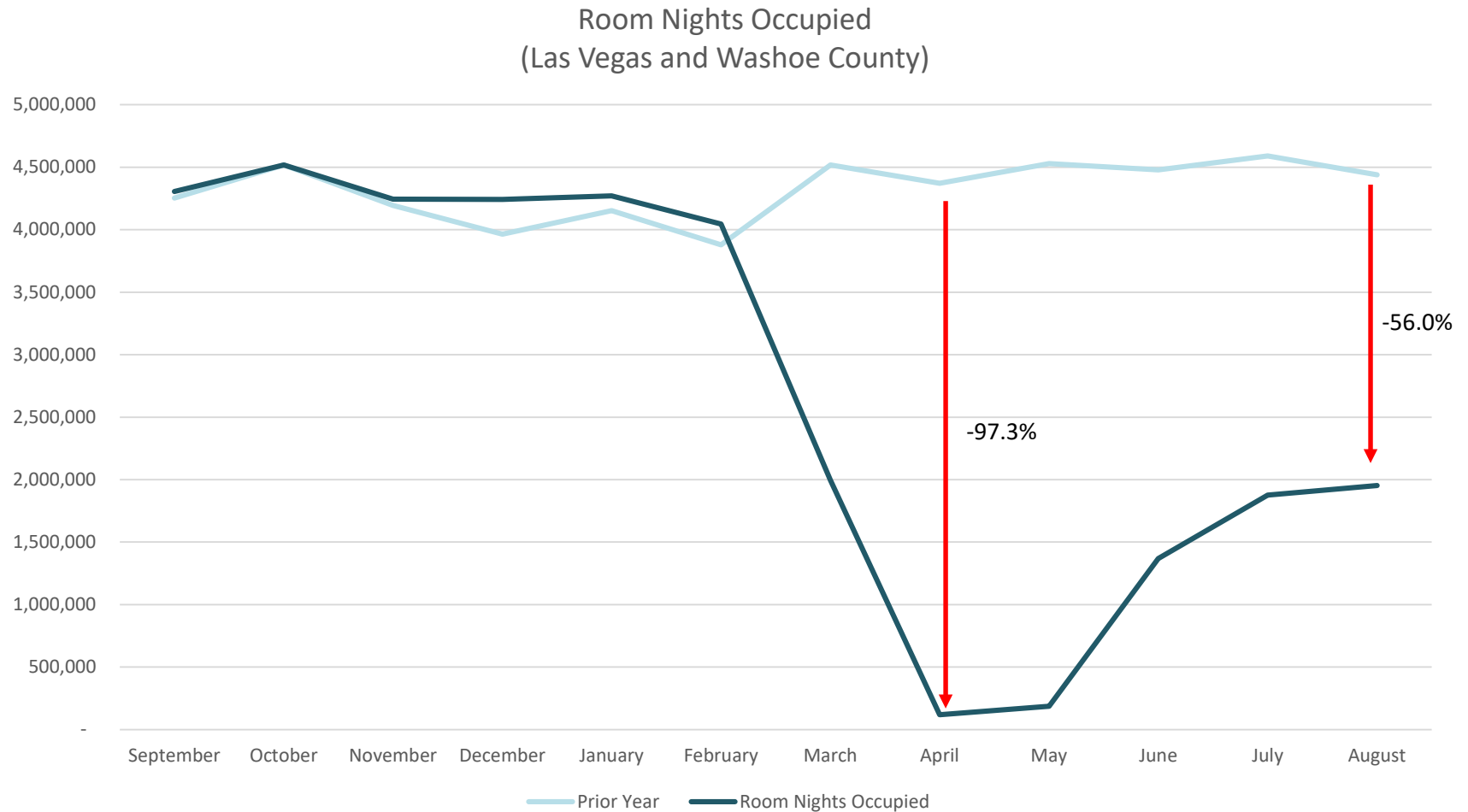
Visitor Volume

Data source: Las Vegas Convention and Visitors Authority, Reno-Sparks Convention and Visitors Authority



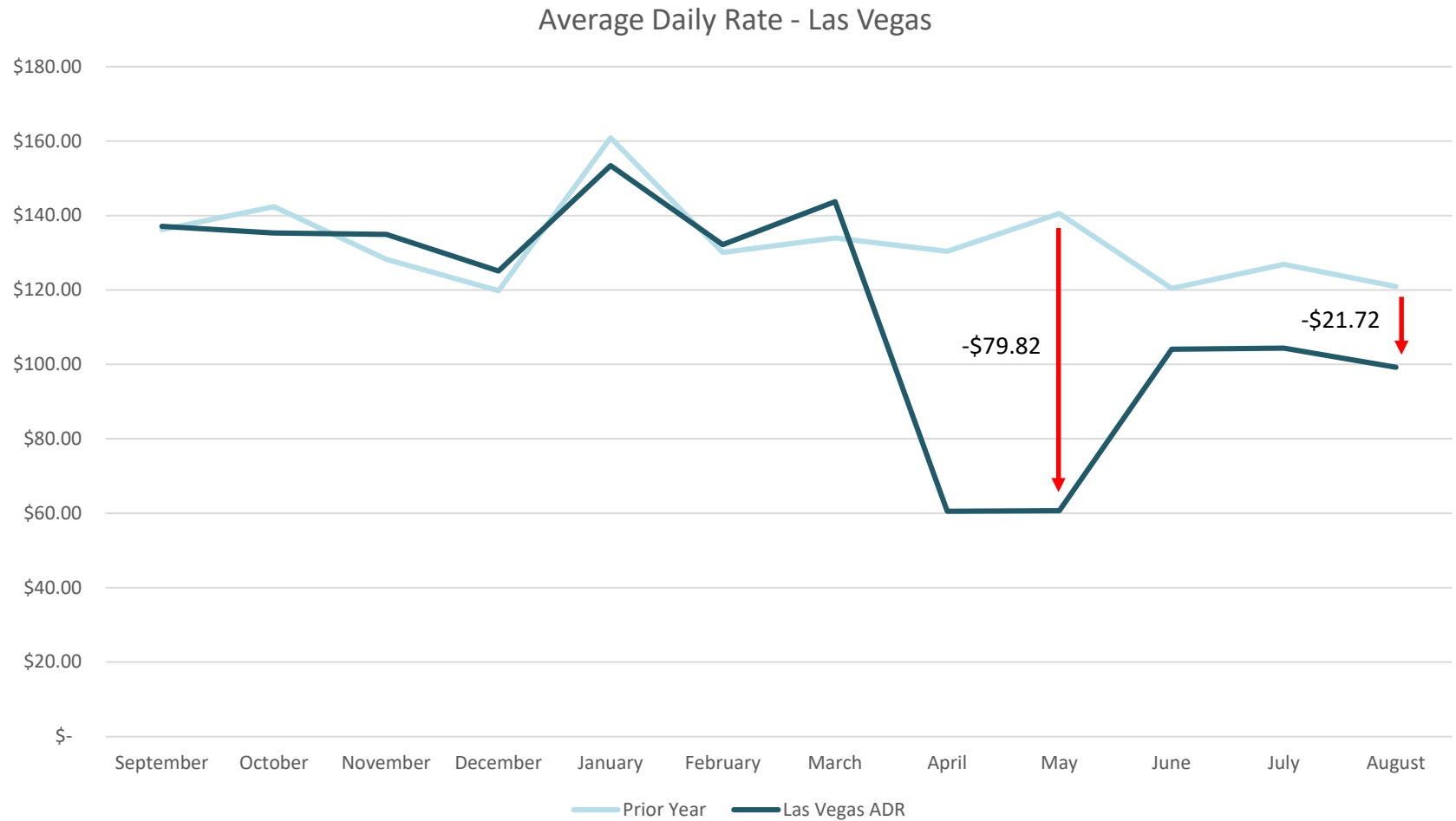
Room Nights Occupied

Data source: Las Vegas Convention and Visitors Authority, Reno-Sparks Convention and Visitors Authority



Average Daily Rate

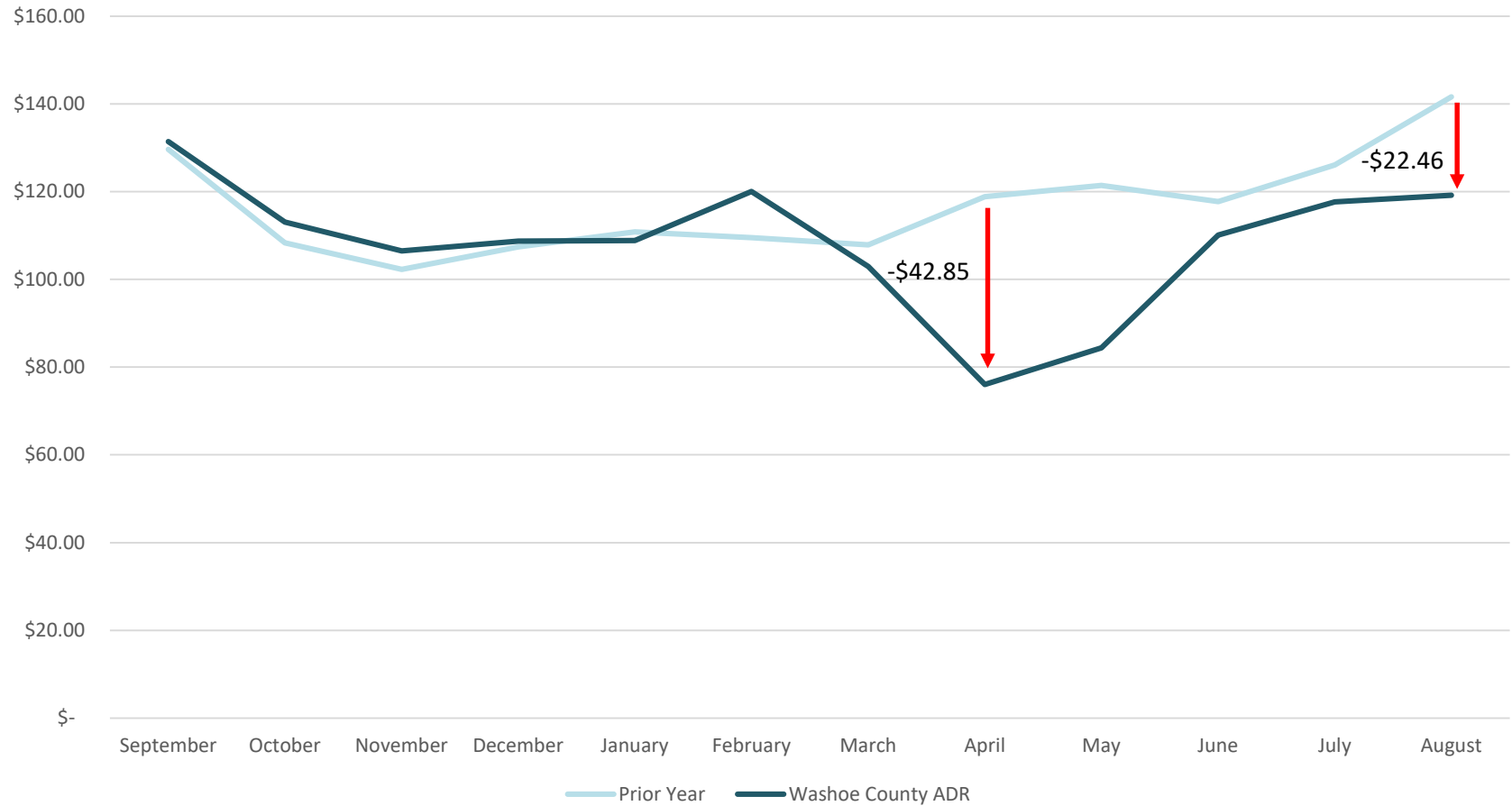
Data source: Las Vegas Convention and Visitors Authority



Average Daily Rate

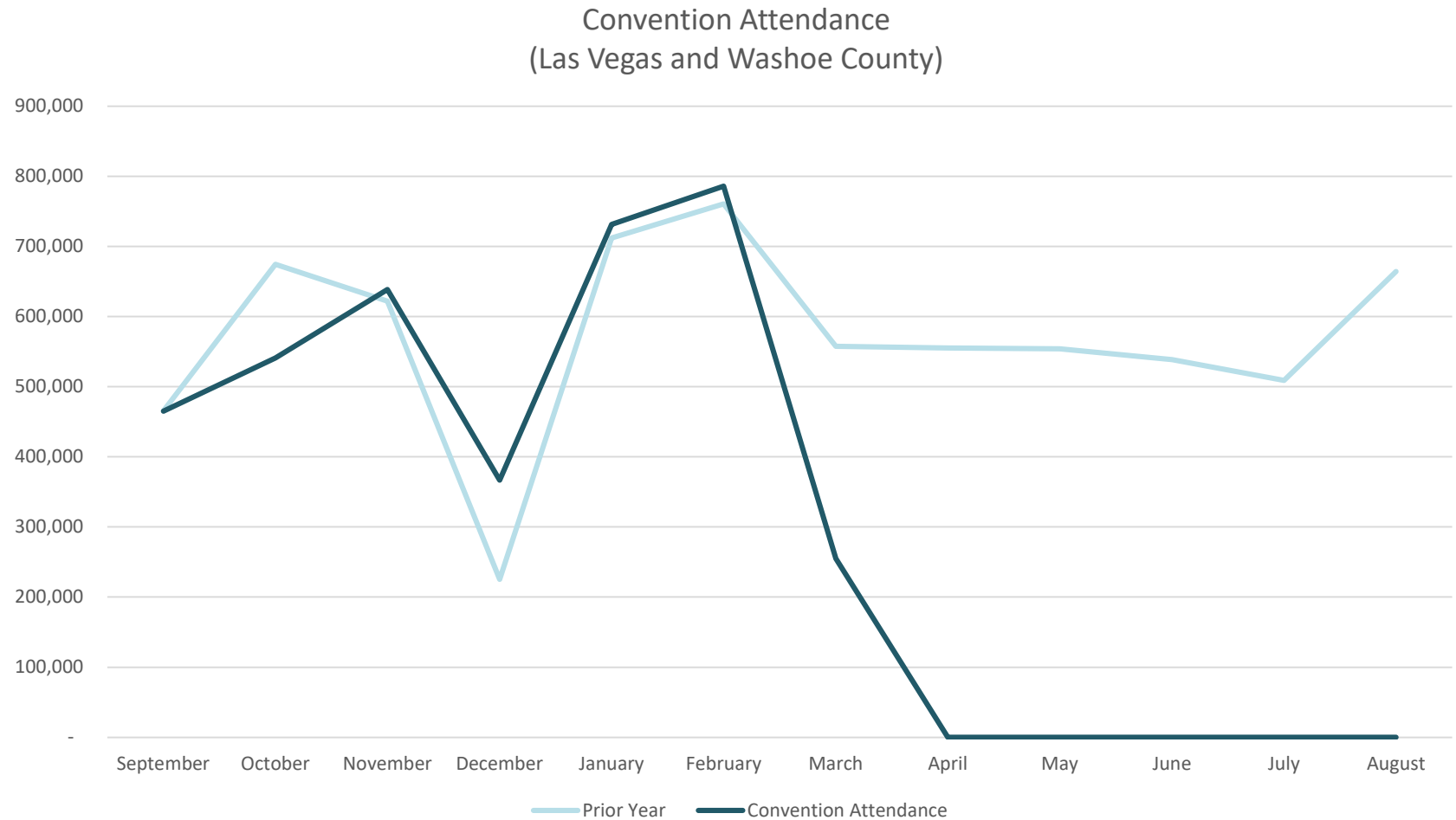
Data source: Reno-Sparks Convention and Visitors Authority

Average Daily Rate - Washoe County



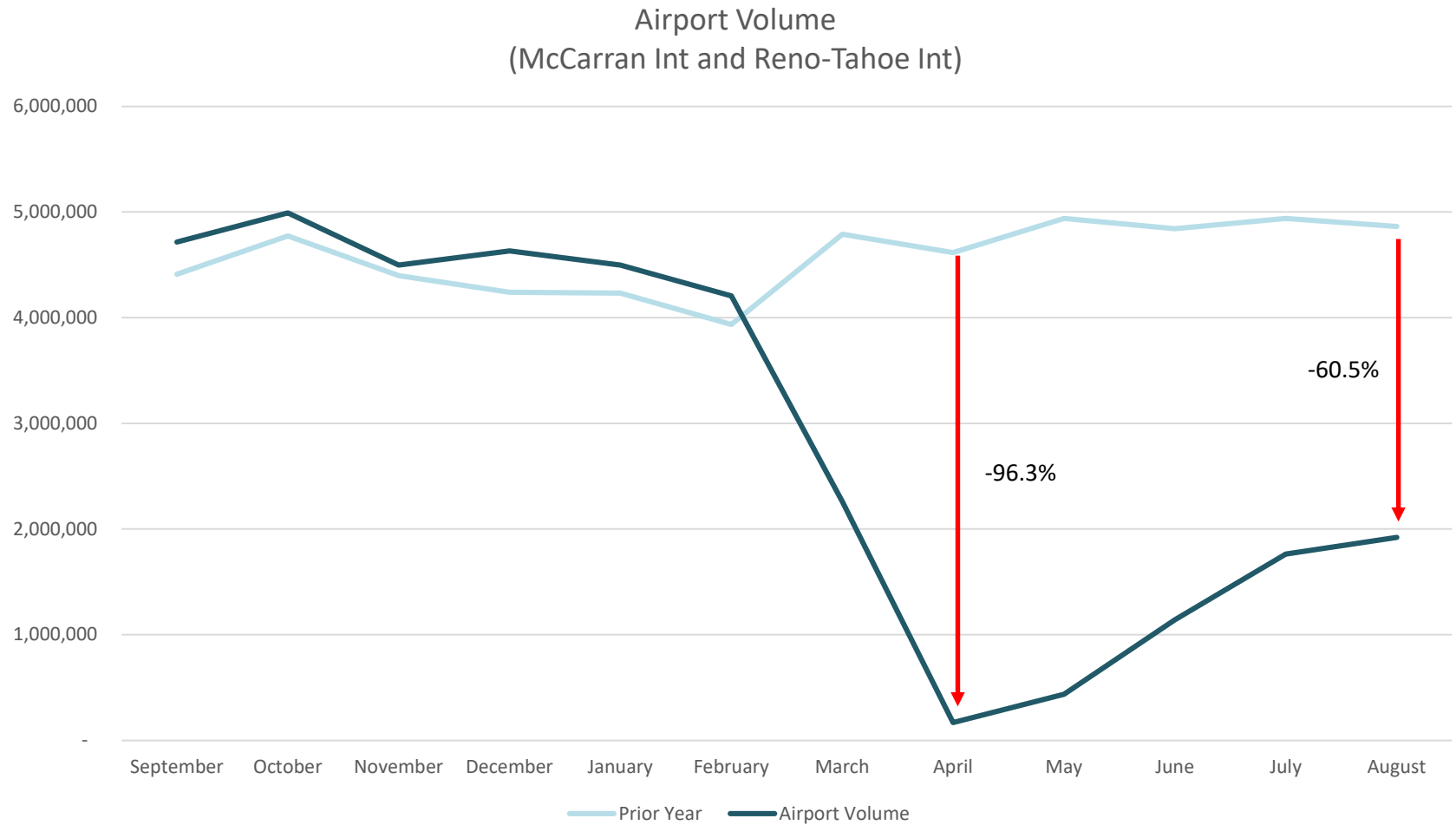
Convention Attendance

Data source: Las Vegas Convention and Visitors Authority, Reno-Sparks Convention and Visitors Authority



Airport Volume

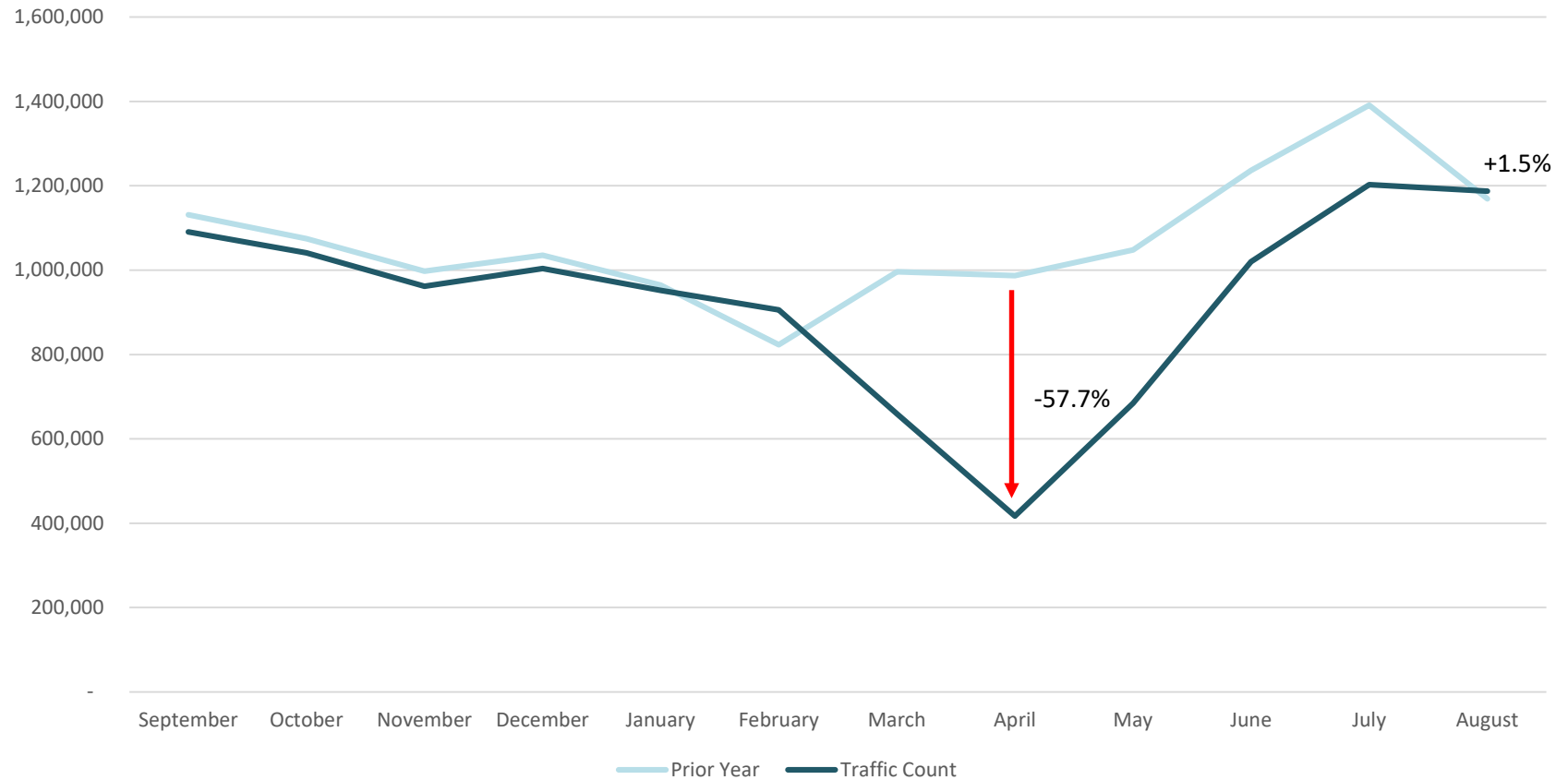
Data source: McCarran International Airport, Reno –Tahoe International Airport



Traffic Volume

Data source: Nevada Department of Transportation

Daily Traffic Counts
(Primm/Jean + So. Lake Tahoe)

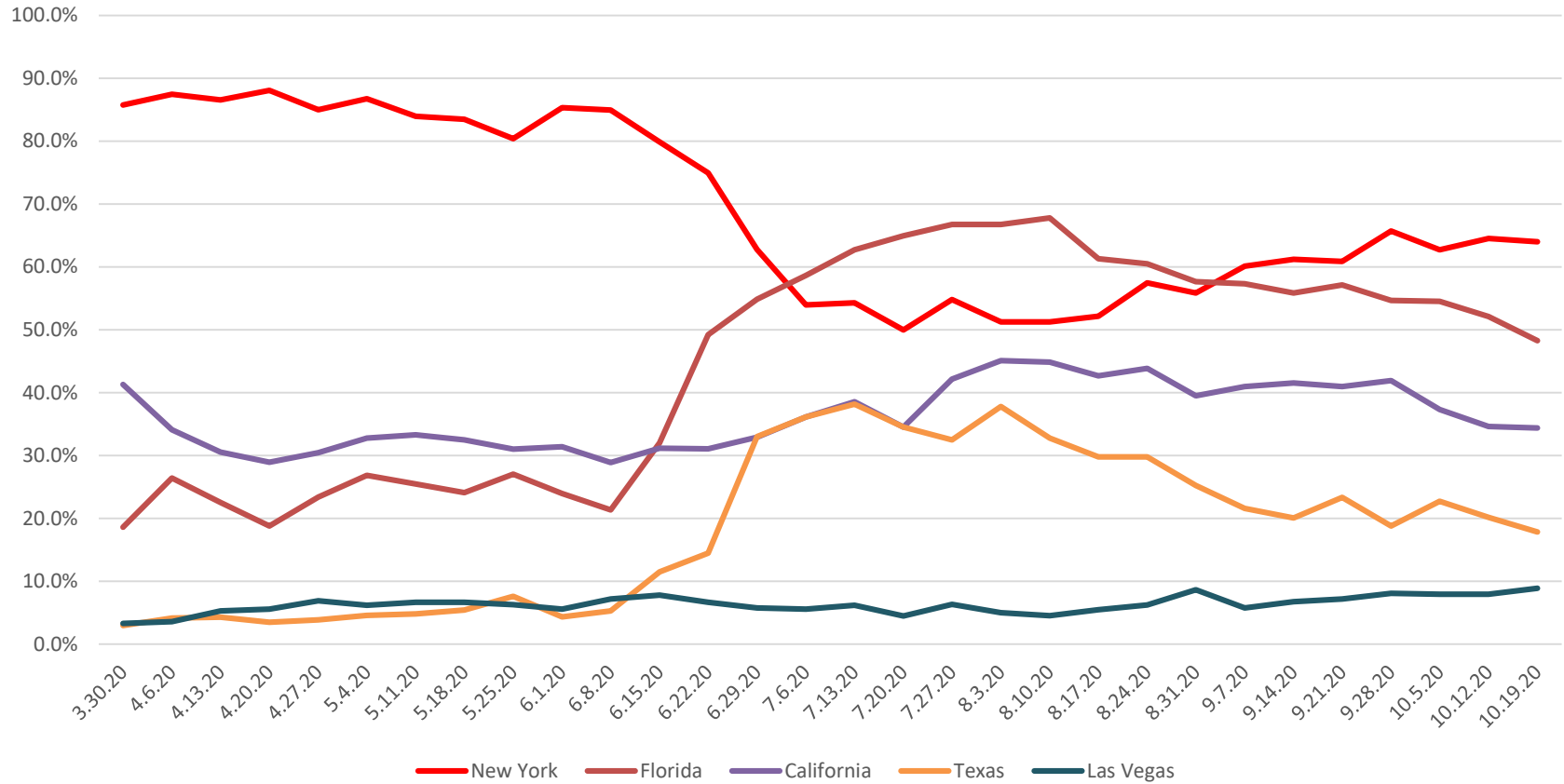


COMPETITIVE STATS

Destinations Associated with Virus

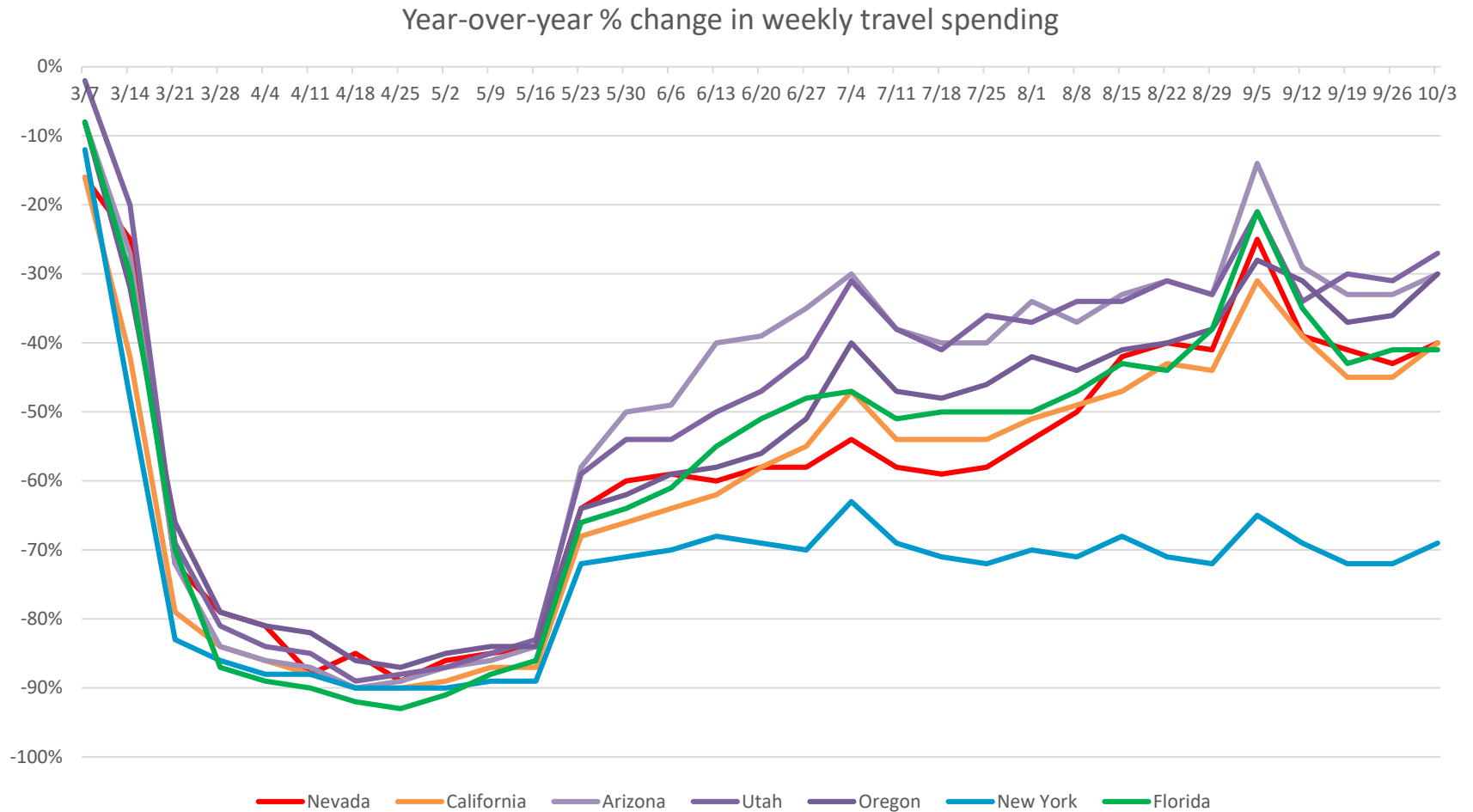
Data source: Destination Analysts

What are three U.S. travel destinations (if any) that have been most talked about as places with coronavirus issues?



Weekly Travel Spending Comparison

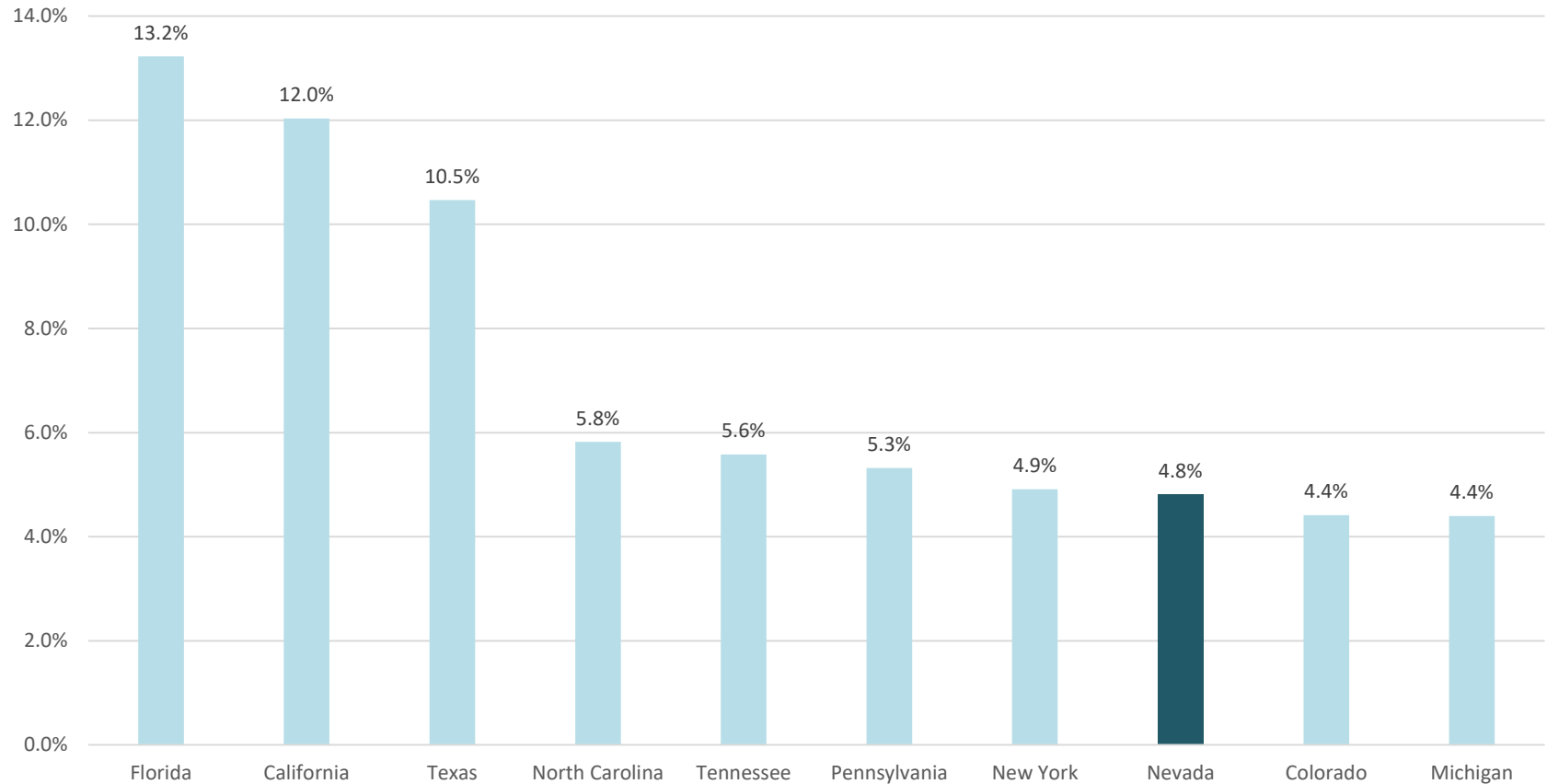
Data source: US Travel Association, Tourism Economics



Summer visitation

Data source: Destination Analysts

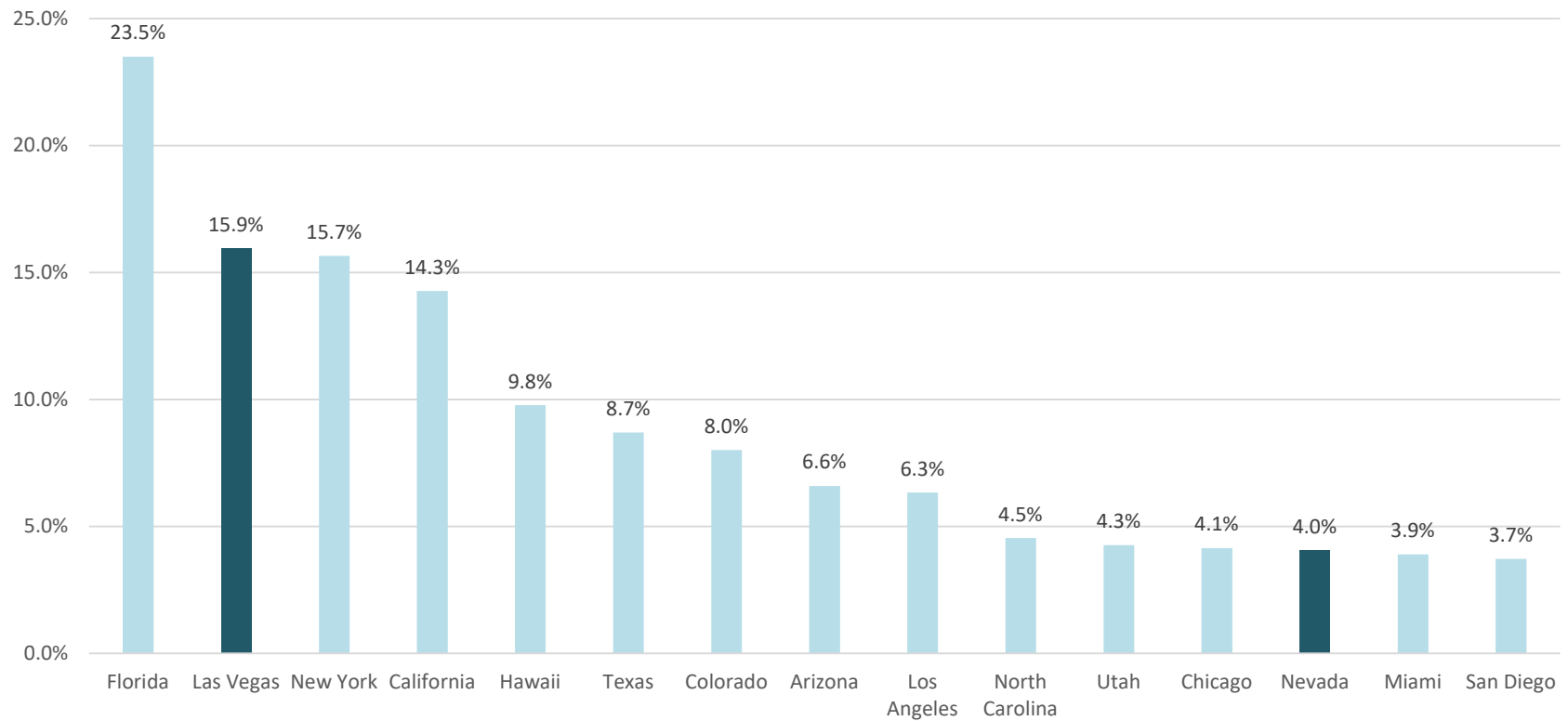
Which state(s) did you visit (or travel within) on any leisure trip(s) this summer?
(Wave 26)



Desired Destinations

Data source: Destination Analysts

What are the three US travel destinations that you most want to visit in the next 12 months? (Unaided)
(Wave 30)



Key takeaways

- Return to travel will be determinant on health situation. Fear levels around contracting virus largely unchanged over past few months, suggesting a lengthy travel recovery.
- Travel sentiment is still far from normal levels as fear levels remain elevated, though some indicators are trending in positive direction.
- Travel levels remain depressed; however, visitation statistics have increased each month after re-opening.
- Las Vegas and Nevada still top-of-mind destinations for travelers. This provides hope that pent-up demand will lead to a quicker travel recovery when COVID crisis passes.

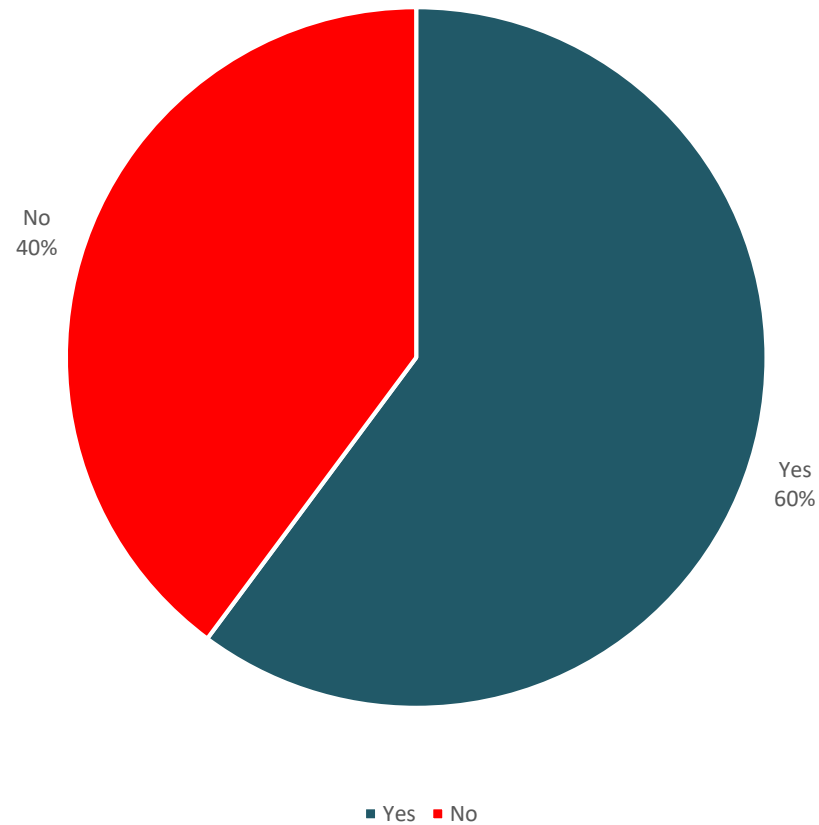
CONSUMER NEWSLETTER RESULTS

Keep in mind

- Results not a representative sample of US travelers
- Results not necessarily a representative sample of Travel Nevada's newsletter base
- Data is unweighted
- Sent to: 49,918
- Responses: 1,207

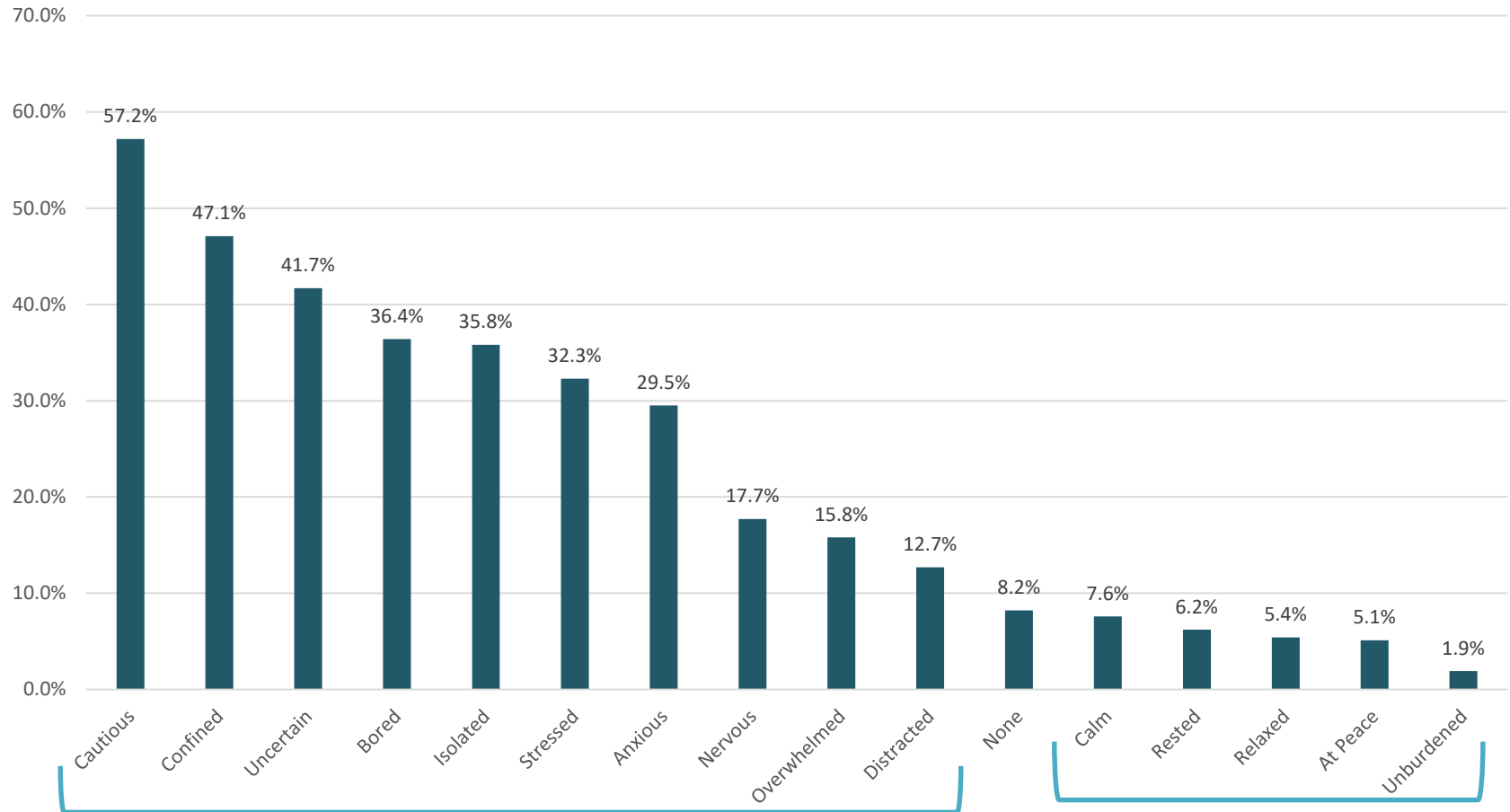
Travel Readiness

At this point in time, are you ready to travel?



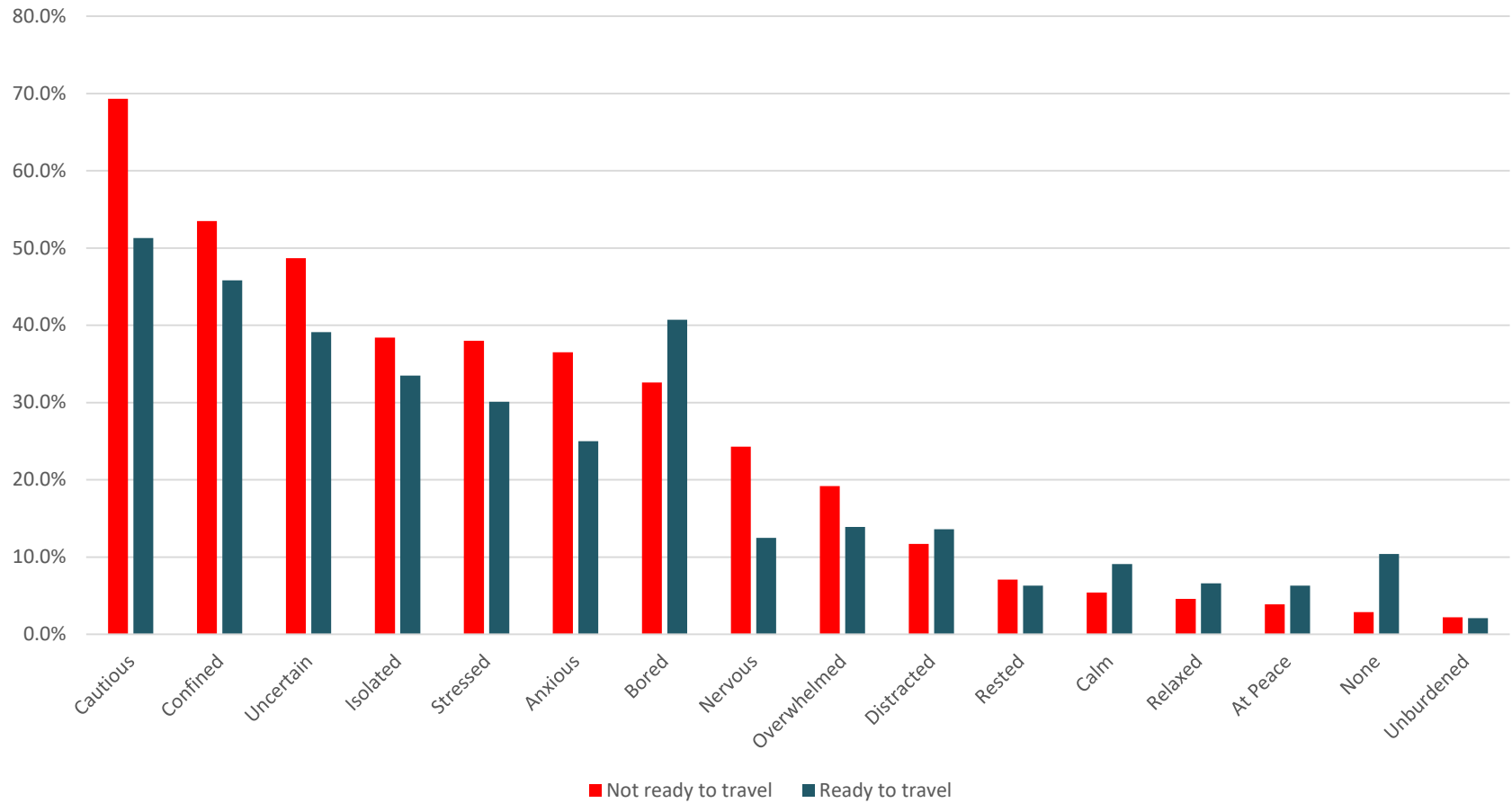
Feelings During Pandemic

During the COVID-19 pandemic, have you felt more...



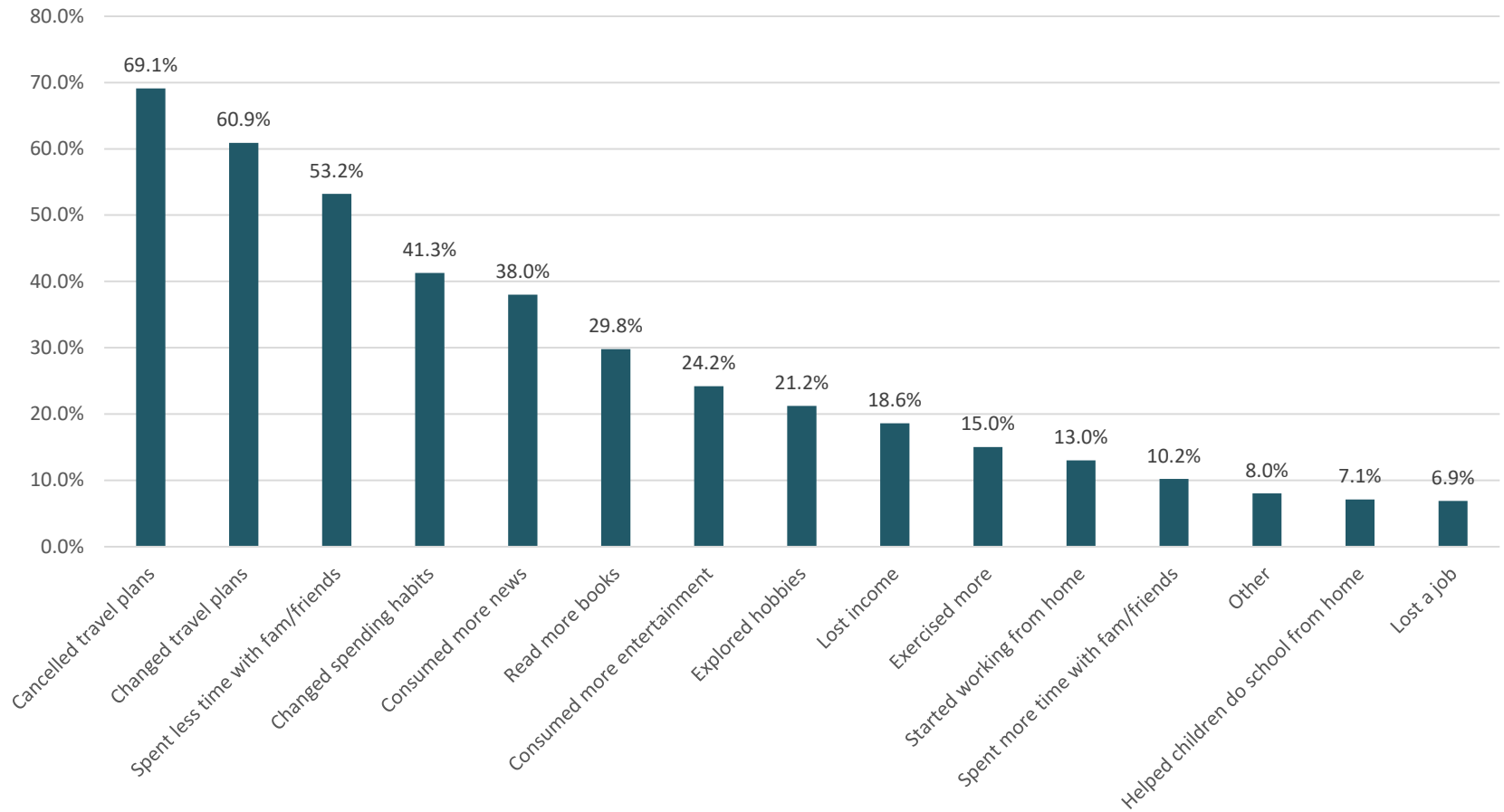
Feelings During Pandemic

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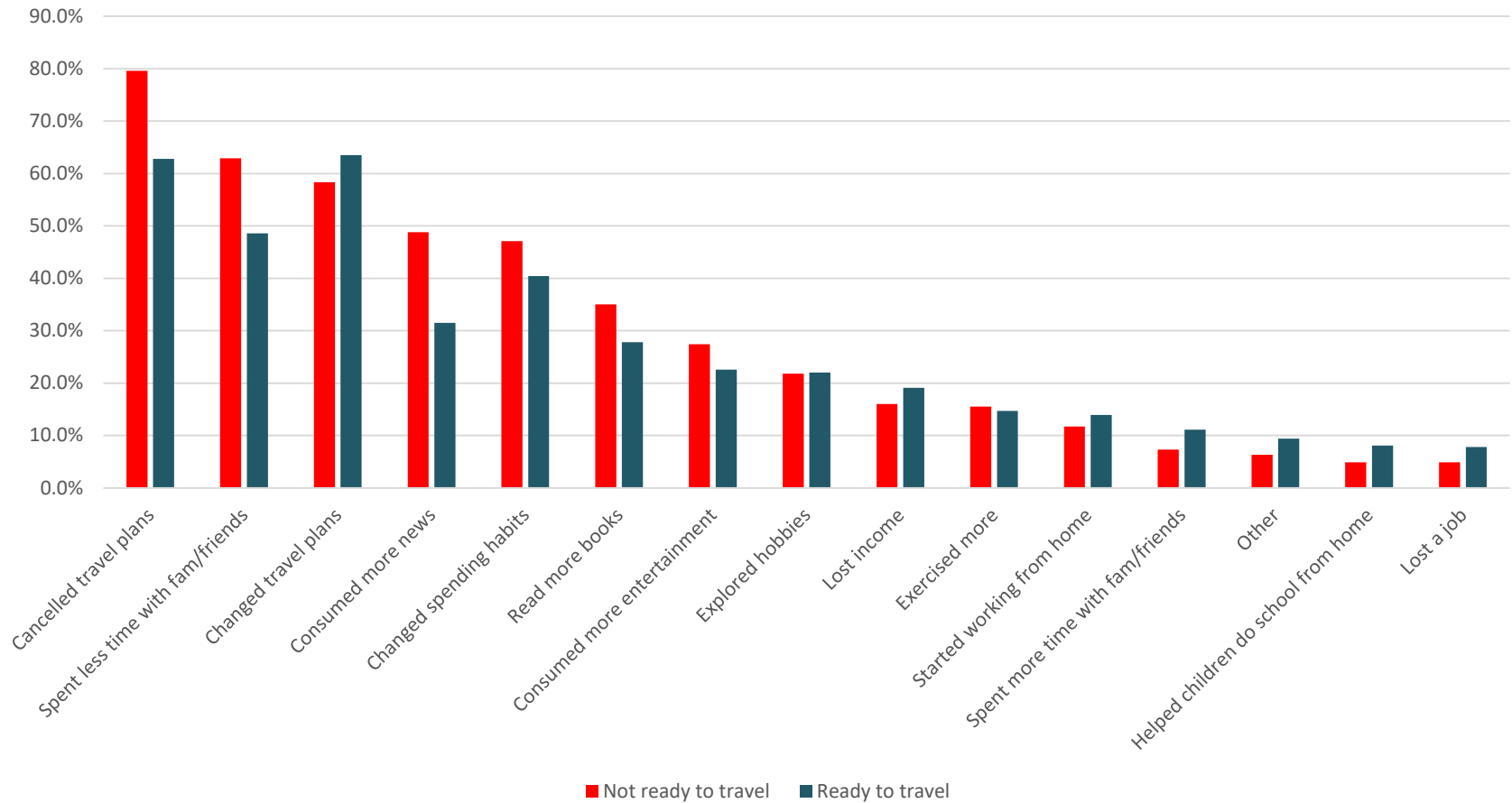
COVID Behavior

During the COVID-19 pandemic, have you...



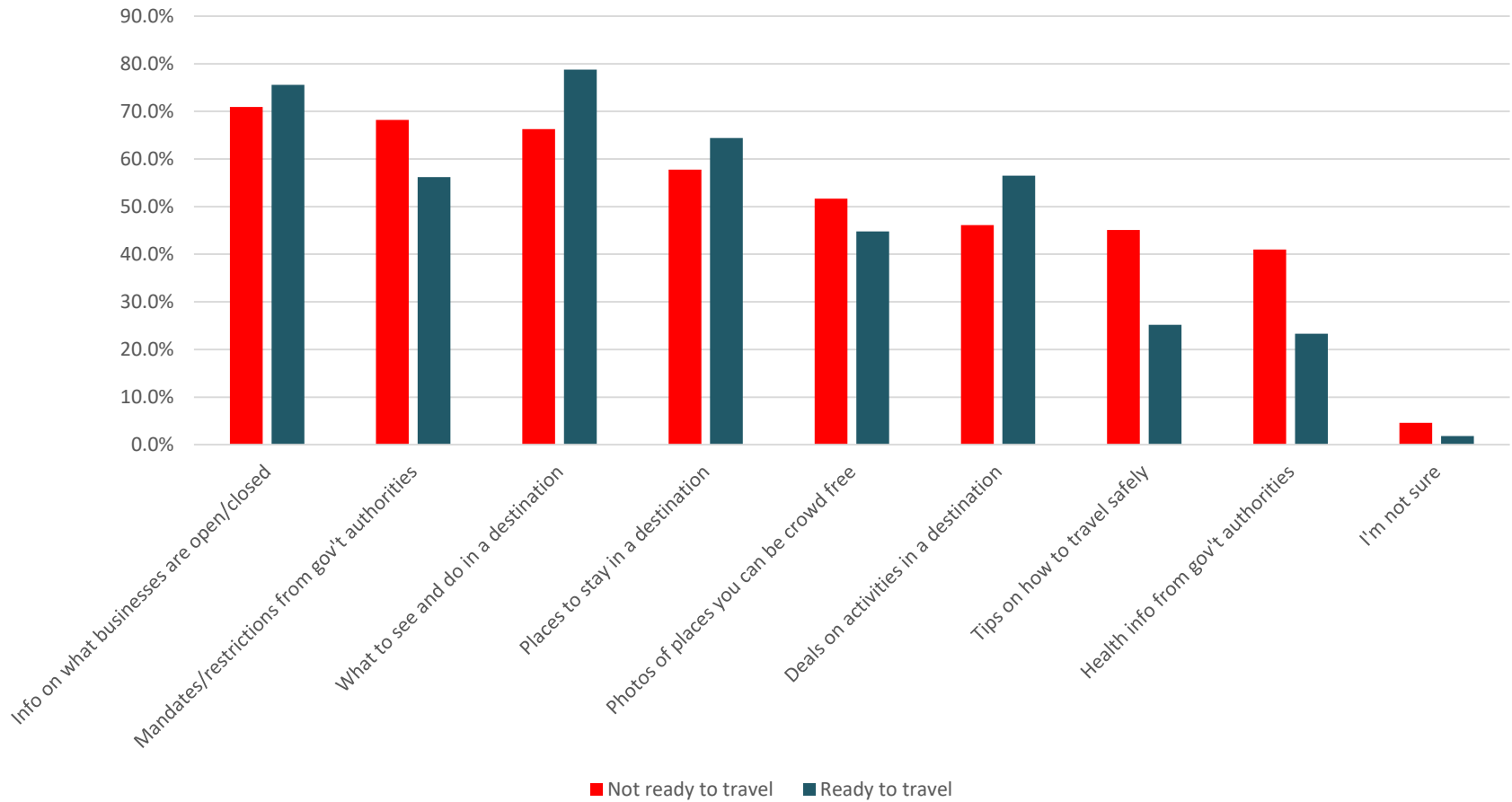
COVID Behavior

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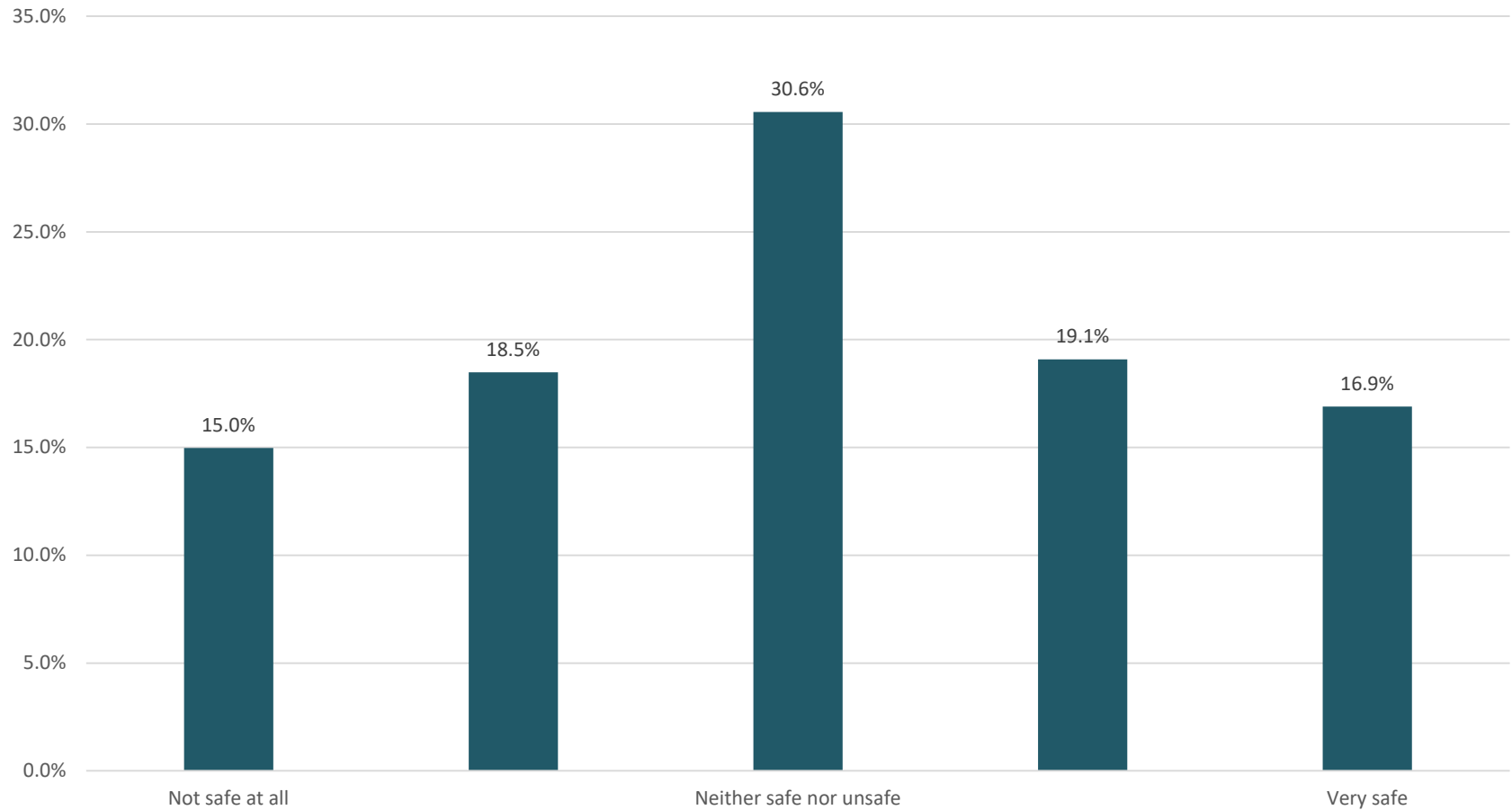
Destination Website Visitation

If you were to visit a destination's website, what would you want it to address?



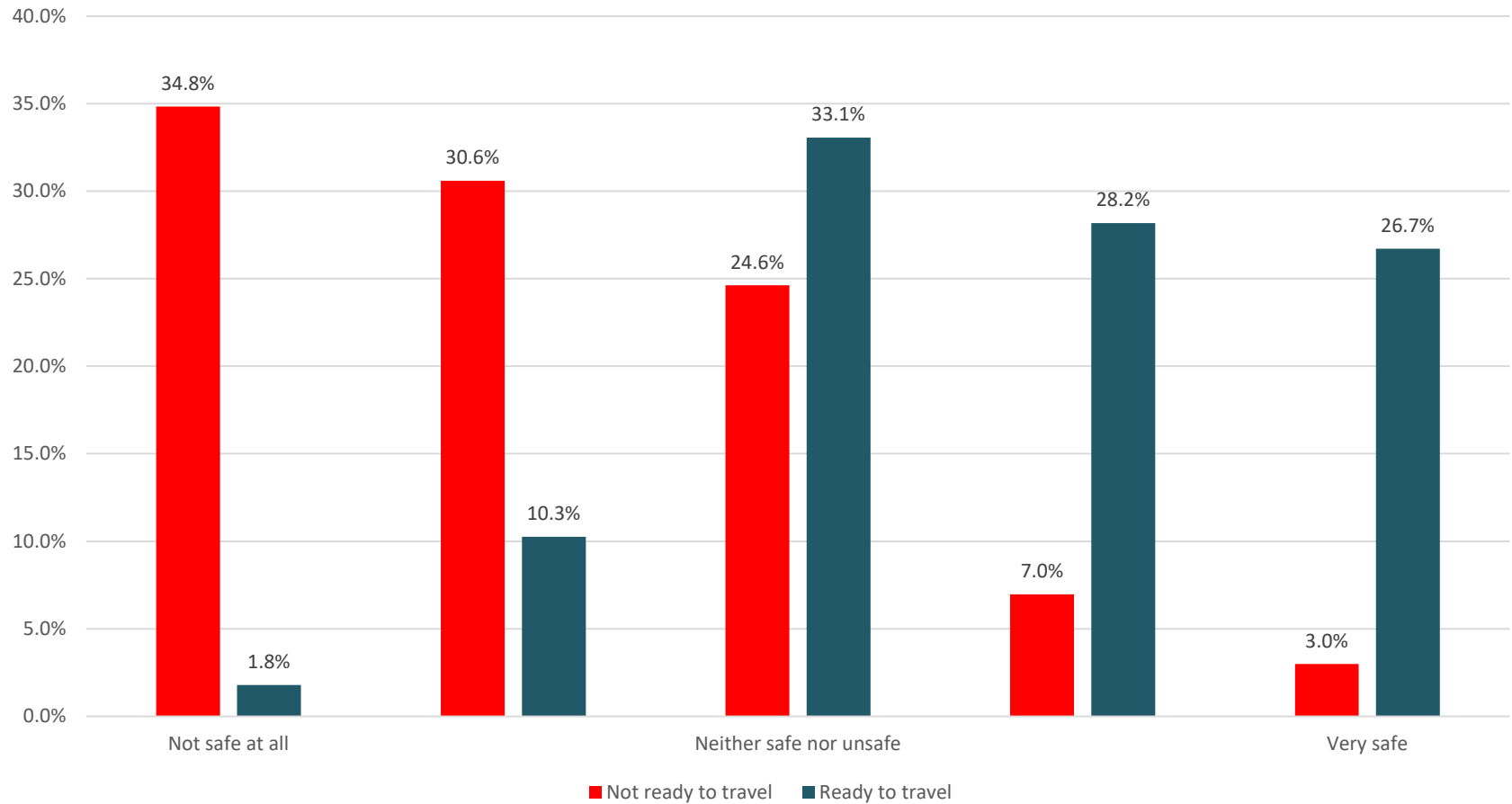
Travel Safety

At the current moment, how safe do you feel to travel?

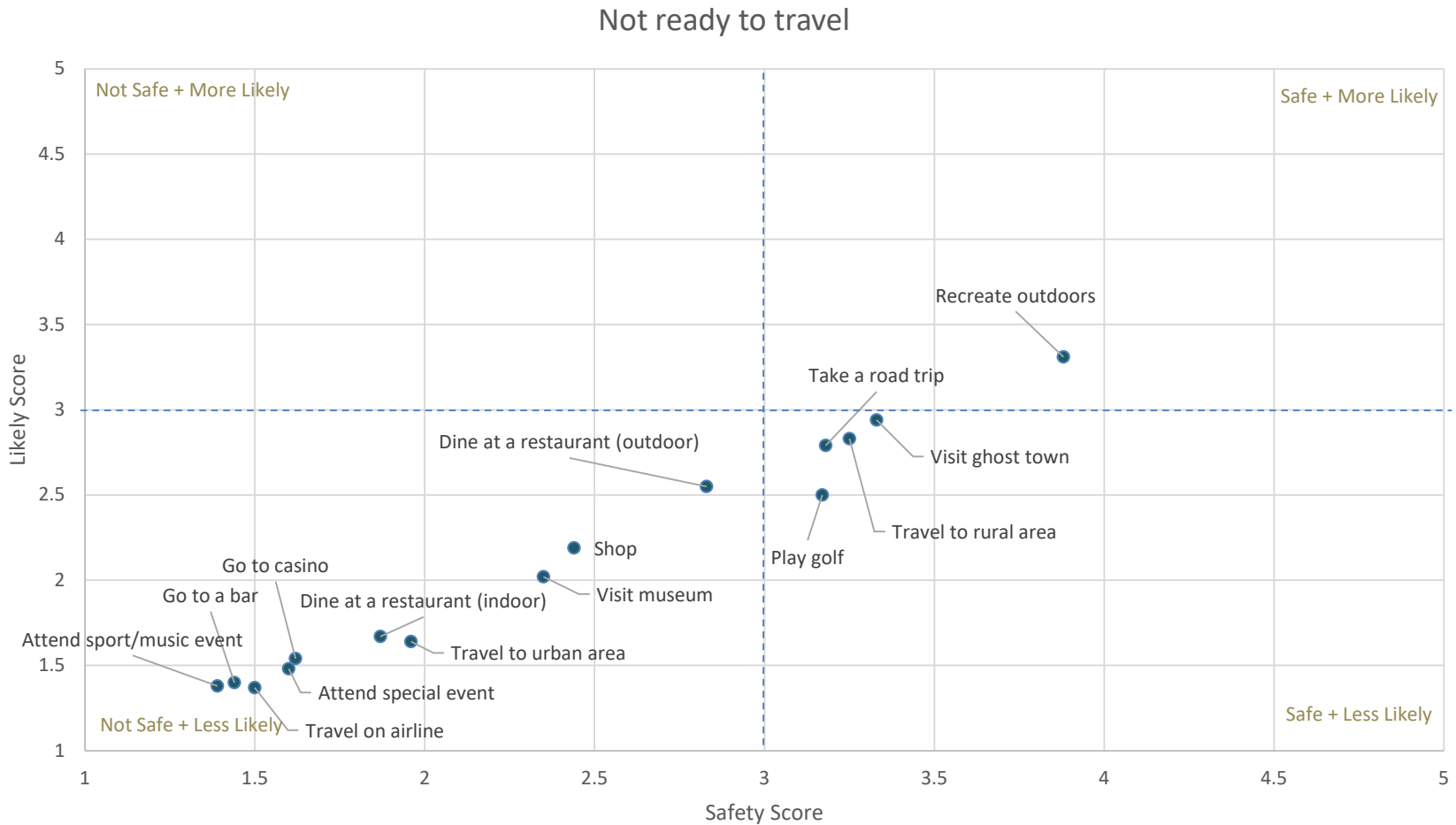


Travel Safety

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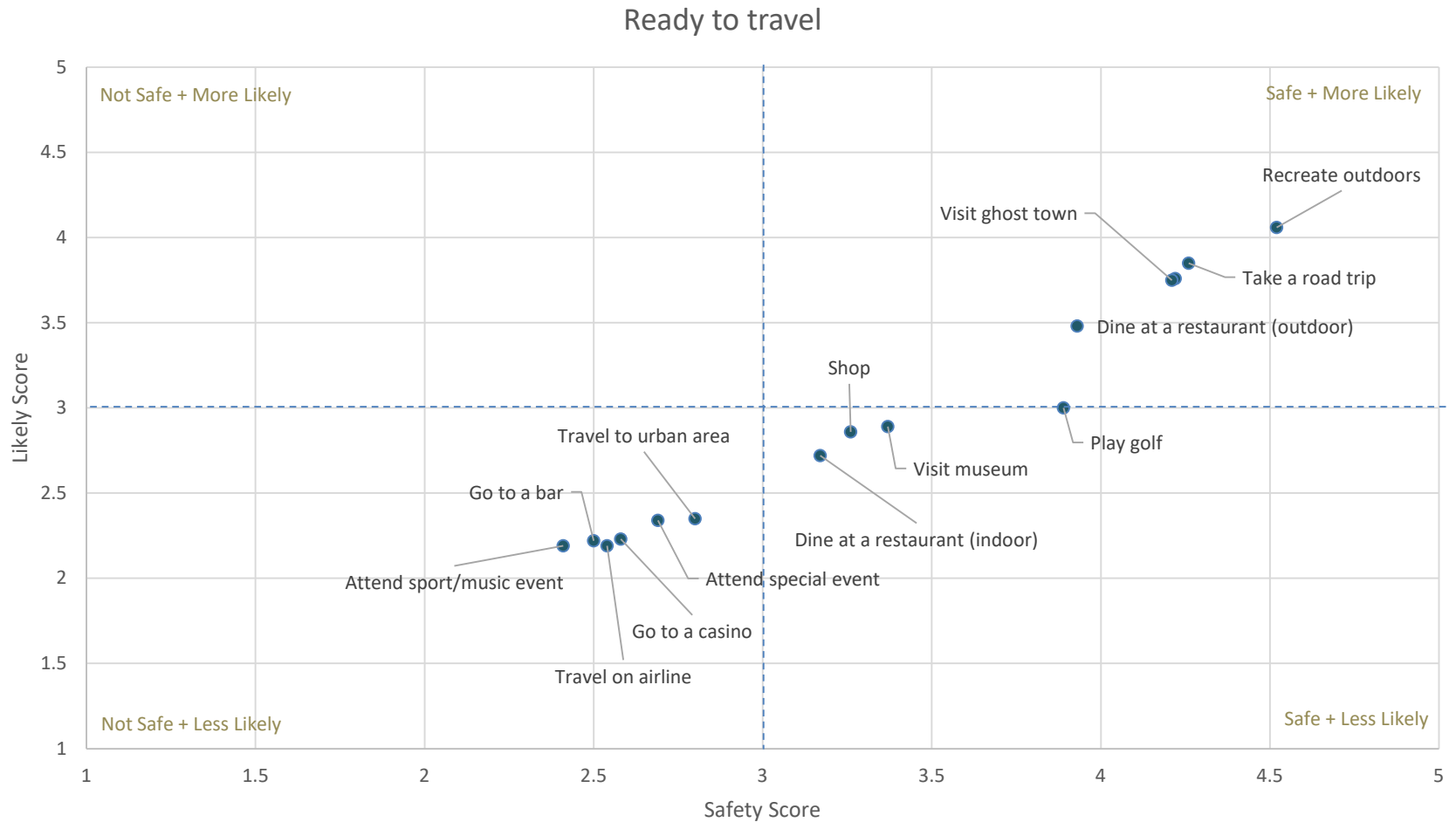
Activity Ratings



Q: For the following activities, which do you feel are generally safe or unsafe during the COVID-19 pandemic?

Q: How has the COVID-19 breakout affected your likeliness to do the following?

Activity Ratings

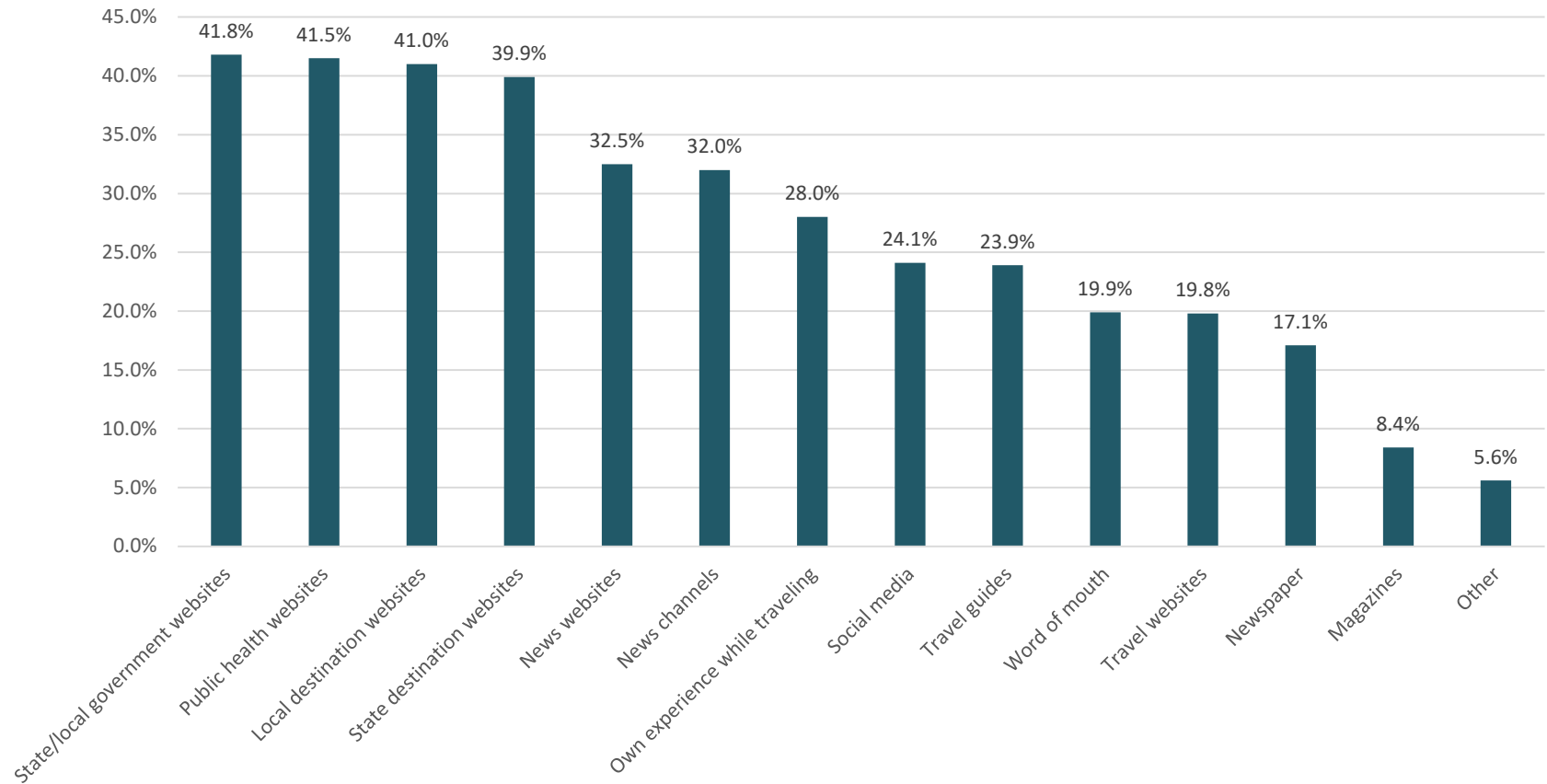


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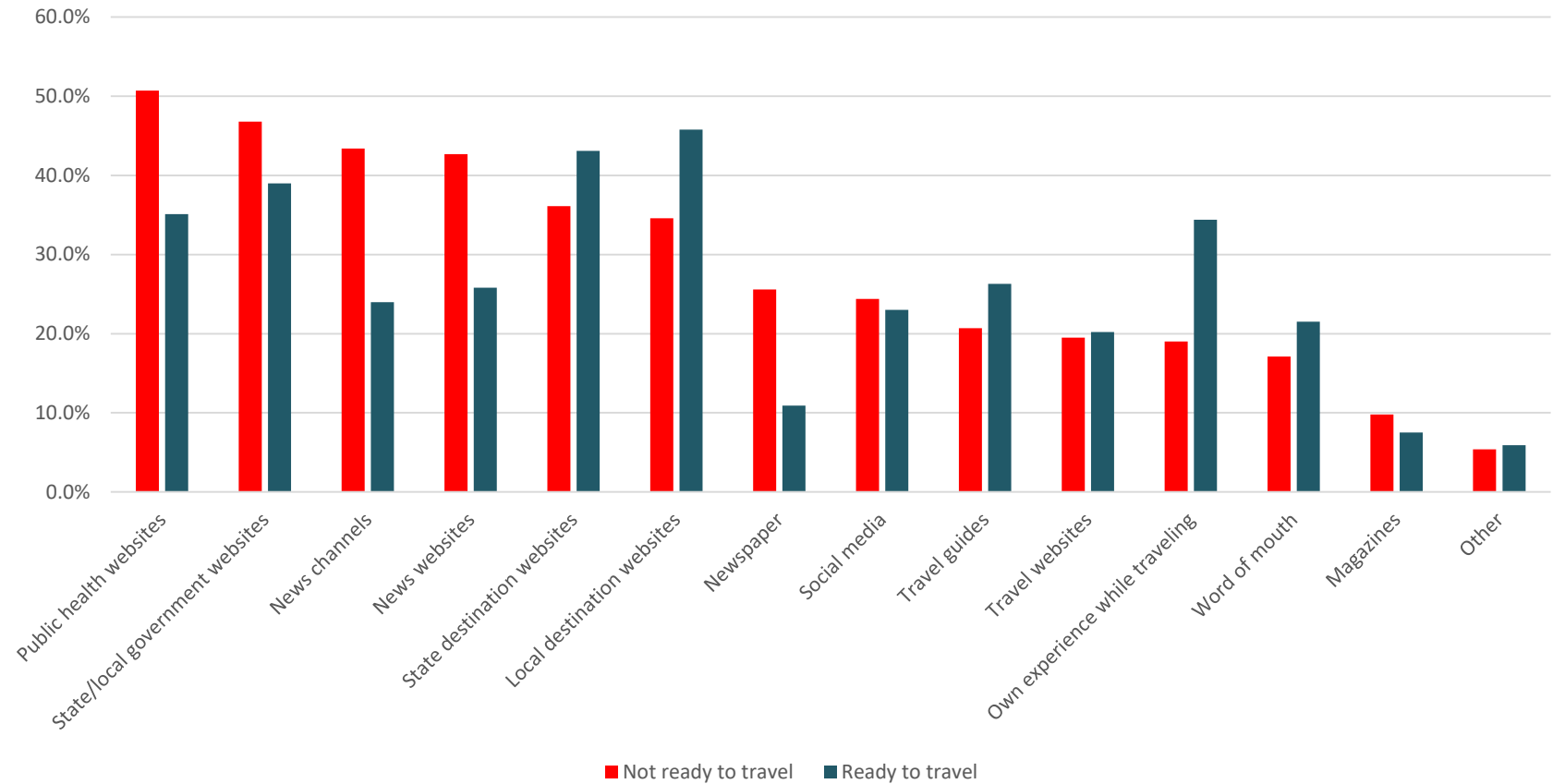
Travel Information

During the COVID-19 pandemic, how have you gathered your information on traveling safely?



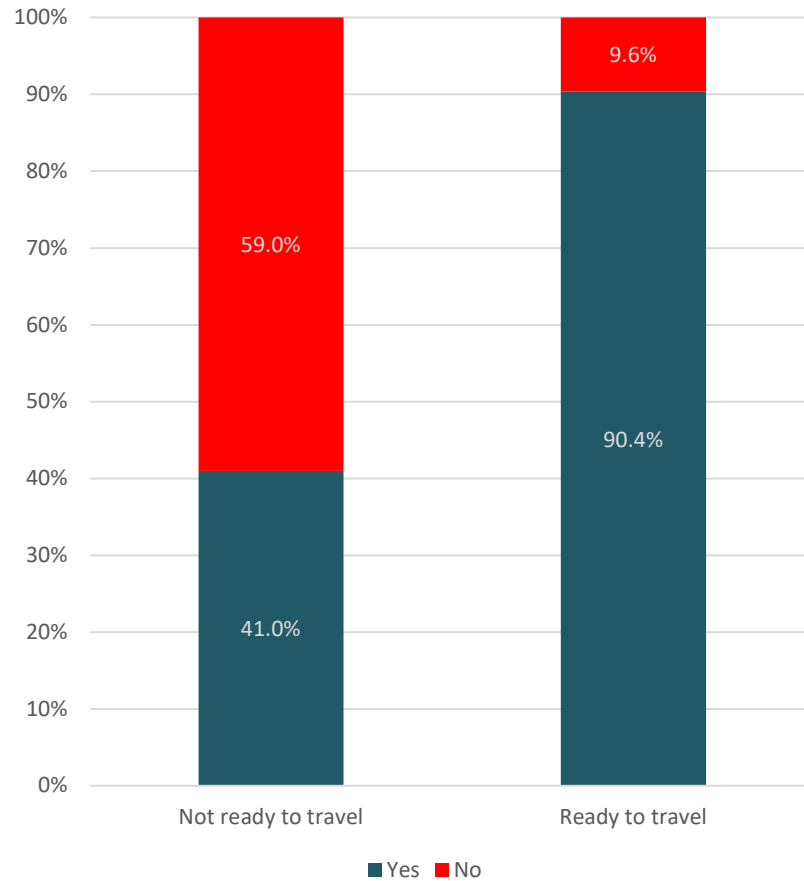
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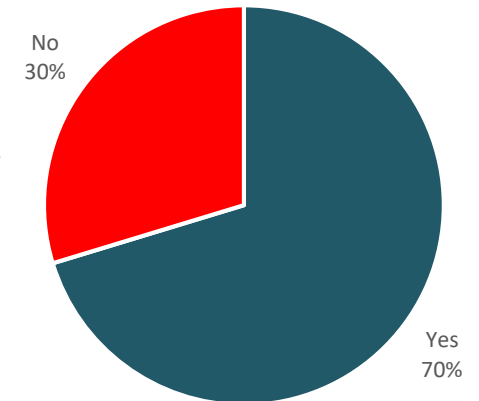


Travel Messaging

At this point in time, are you ready to hear messages about traveling?

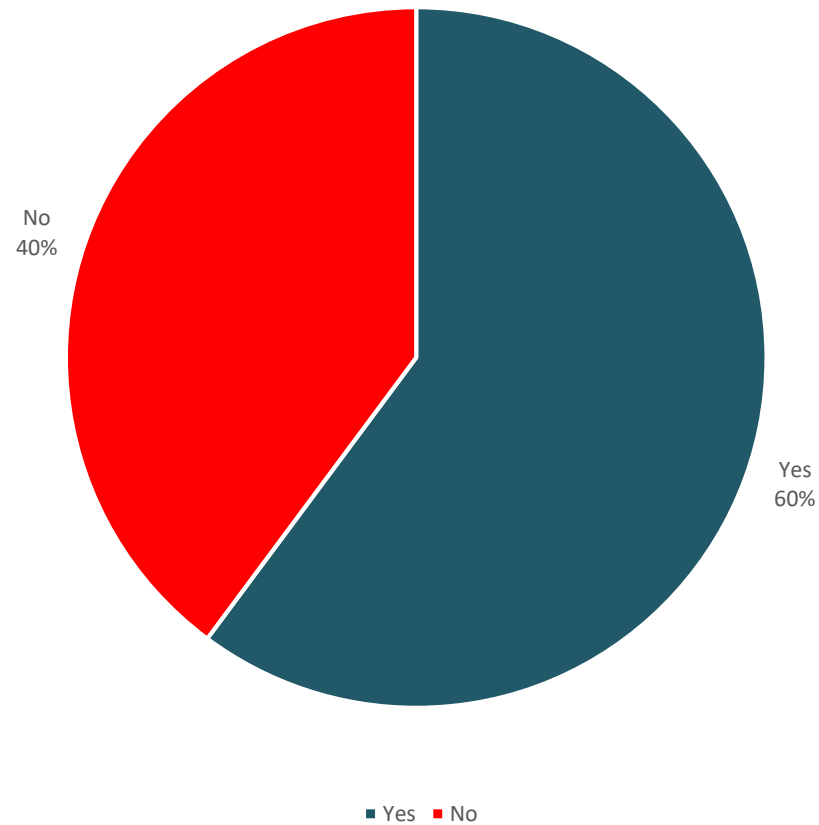


At this point in time, are you ready to hear messages about traveling?



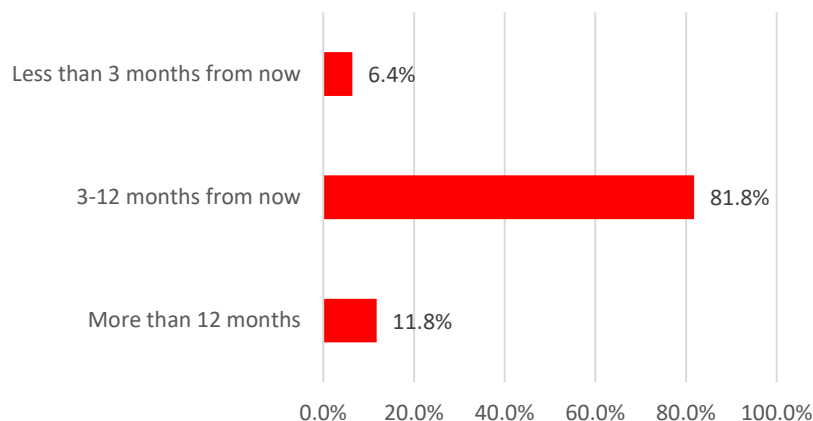
Travel Readiness

At this point in time, are you ready to travel?

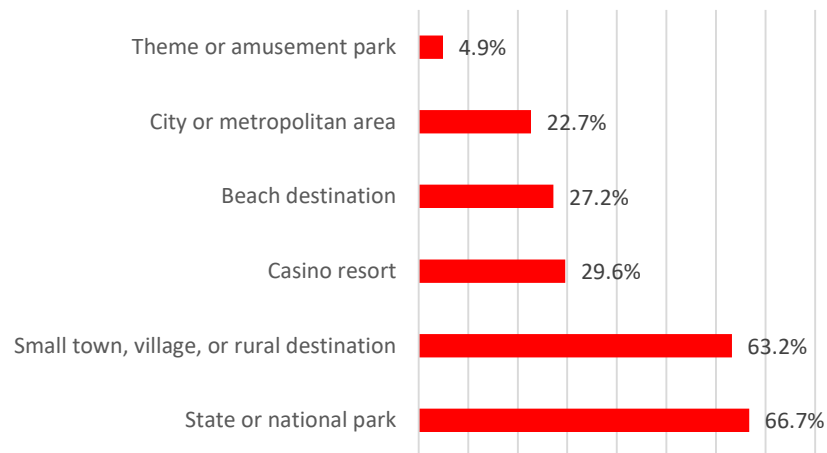


Travel Characteristics – Not Ready to Travel

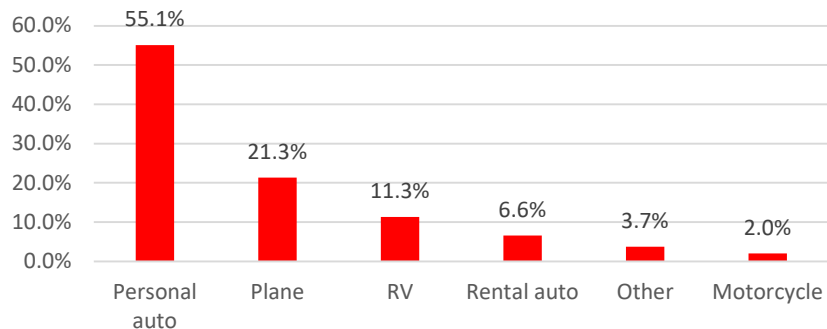
When do you think you'll be ready to travel again?



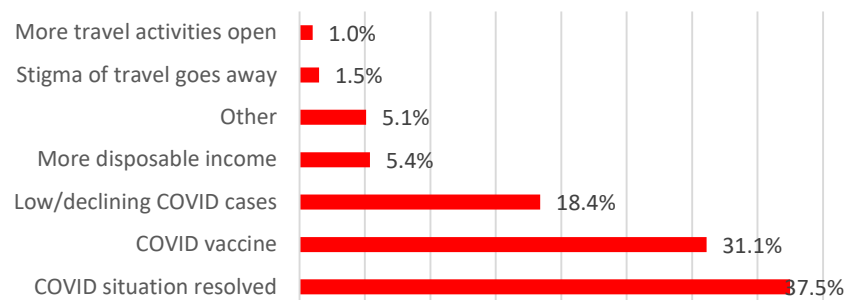
Where do you think you may travel to?



What do you think will be your primary mode of transportation?

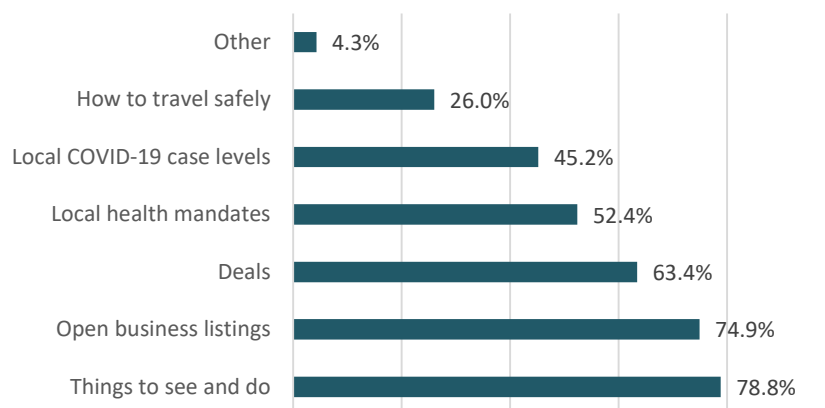


What would be the most important factor in a decision to travel again?

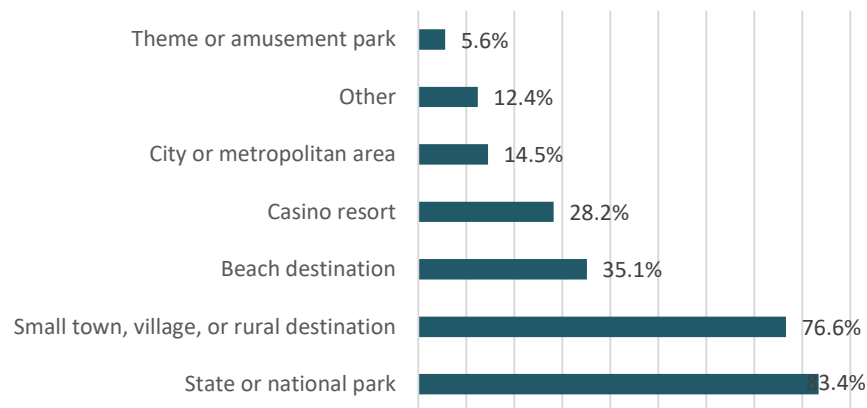


Travel Characteristics – Ready to Travel

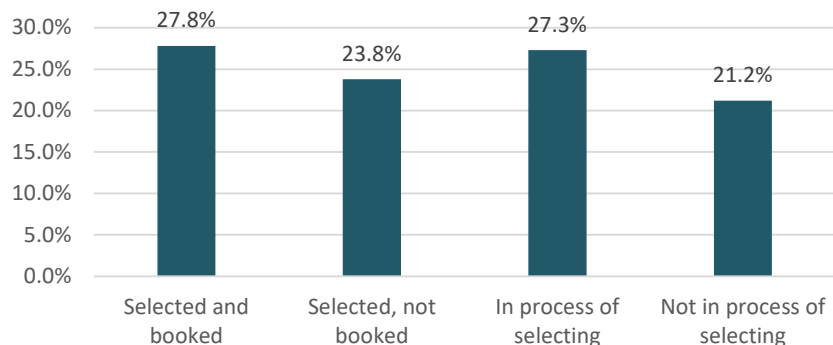
What content is helpful for planning during this time?



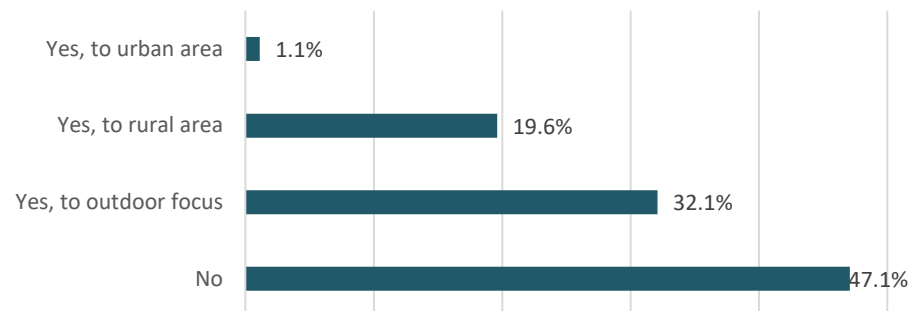
What types of destinations are you currently interested in visiting?



What phase of travel planning are you currently in?



Has your destination focus changed during the COVID-19 pandemic?



Key takeaways

- Although majority of respondents (60%) indicated that they are ready to travel and hear travel messages (70%), there are attitudinal differences reported among those who are ready to travel vs not ready to travel.
- Attitudes toward safety vary between segments. Ready to travel segment feel safer traveling and rate travel activities as more safe, less likely to gather travel safety information from public health authorities and expect destinations to provide information on what there is to see and do in a destination and what businesses are open or closed.
- Those not ready to travel feel less safe traveling and rate travel activities as less safe, more likely to gather travel safety information from public health authorities, more likely to have felt negative emotions during the pandemic, and the most important factors to get back out and traveling are all health-related.