



Winter Insights

08.19.20

colle**mcvoy**



WINTER
2020

A tale of two realities

People can't wait to travel
this winter

People are afraid to travel
this winter



Pent-up demand for major purchases, such as vacations and traveling, have only been increasing over time. [...] This trend is even further compounded by the severity of the COVID-19 outbreak. Residents of states with the highest level of confirmed cases per capita are the most likely to travel within the next 4 months.

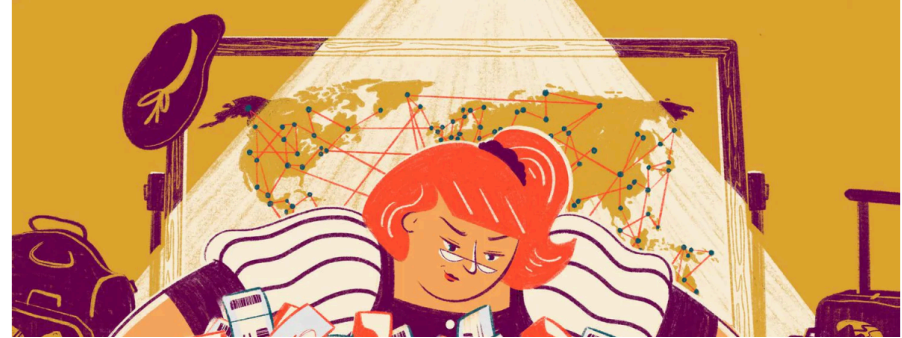
- The Harris Poll
Revenge Travel is Real. May 6-8, 2020 n=2,508 US adults 18+.



Travel is due to come back
with a vengeance.

‘Revenge travel’ is the phenomenon that could bring back tourism with a bang

Experts predict travelers are eager to get back out there — though others caution revenge may not be so sweet.



The Harris Poll
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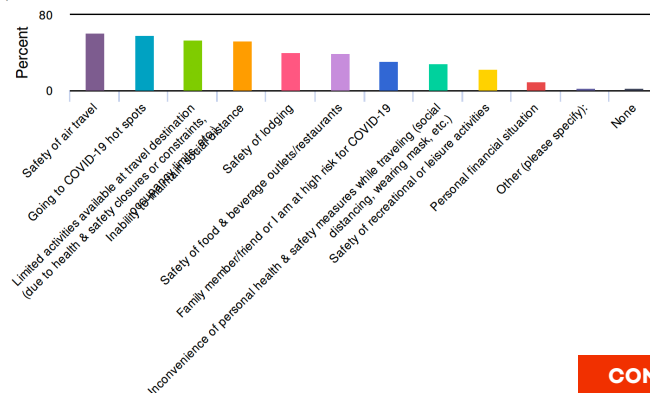
Revenge Travel is Real

Travel Insight Briefs



...Or is it?

8. What would be your biggest concerns about traveling, if any? (Check all that apply)



Source: Jackson Hole Mountain Traveler Sentiment Survey 2020

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Only **44.5%** of people would be excited by a free getaway in the next month.

Source: Destination Analysts, *Coronavirus travel sentiment index report*. N=1,124 US adults 18+, Jul 31-Aug 2 2020.

58% of consumers are not planning to travel for the holiday season (equal to **31M fewer travelers** vs. 2019)

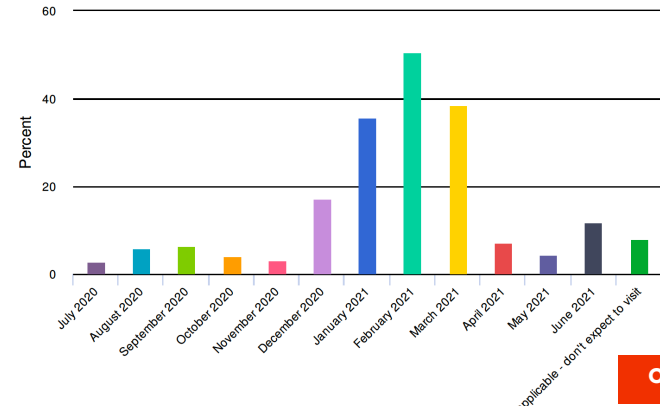
Source: Zeta Global survey, n=44,000 US adults aged 18+, as qtd by CNN Aug. 11 2020

Ski resorts will do well

Ski resorts – and other
indoor locales – will struggle

Ski resorts will do well

13. If you visit Jackson Hole Mountain Resort in the next 12 months, what month(s) would you most likely visit? Please select all that apply for one or more trips in the next 12 months.



Source: Jackson Hole Mountain Traveler Sentiment Survey 2020

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Mintel forecasts
a strong interest
in outdoor
destinations and
experiences
through the end
of 2020.

Source: Mintel, *Global COVID-19 Tracker* – US, May 28-June 4, 2020

72.1%
said mountain
destinations/resorts
(incl ski resorts) are first
on their list for a leisure
trip when they feel it's
safe to travel.

Source: Jackson Hole Mountain
Traveler Sentiment Survey 2020

“

"The Caribbean is big for us... Interestingly, domestic ski destinations haven't been as popular."

- Karen Magee

SVP, Supplier and Adviser Engagement at Protravel and Tzell Travel

”

Sentiment amongst skiers & snowboarders is mixed

69%

of skiers
believe that
Cv-19
restrictions will
negatively
impact next
season

24%

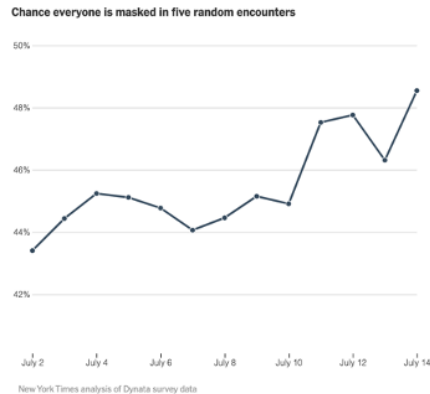
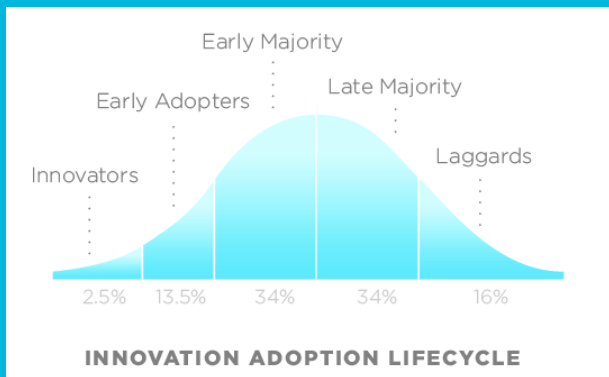
of skiers/
snowboarders
expect to ski
less frequently.

33%

of skiers/
snowboarders
expect to
travel less than
usual.

However there are some things we know for sure.

Mask adoption is moving towards the 'late majority'.

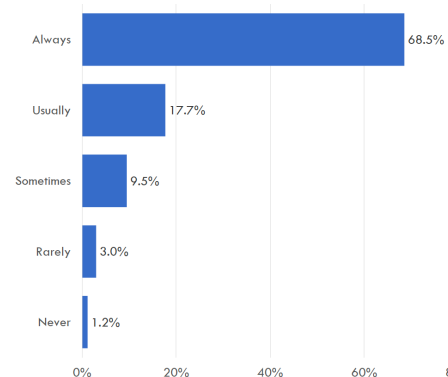


A NYT study showed the chance of people wearing masks in random encounters was near 50% in mid-July.

Source: New York Times, *A detailed map of who is wearing masks in the US*. Jul 17, 2020

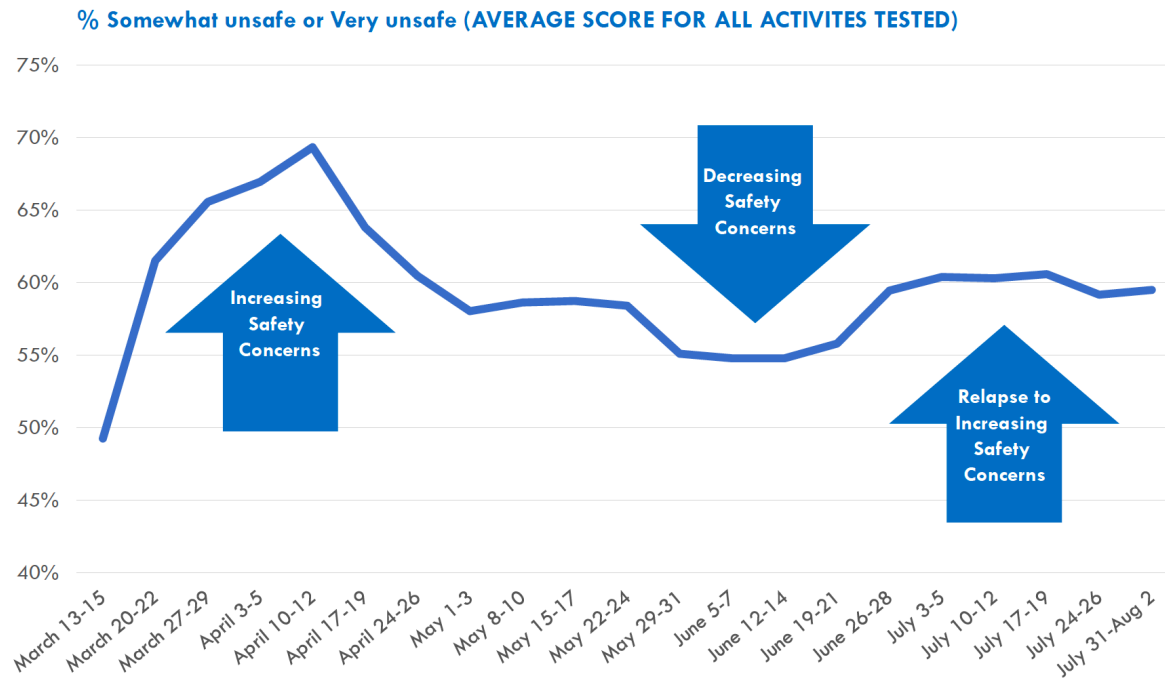
86.3%
of people say they 'always' or 'usually' wear a mask in public

Source: Destination Analysts, *Coronavirus travel sentiment index report*. N=1,124 US adults 18+, Jul 31-Aug 2 2020.



Safety remains a key – and rising – concern.

Question: At this moment, how safe would you feel doing each type of travel activity?



Travelers crave more
detailed trip-planning
information.

62.4%

want a clear picture of
what it's like to visit
the destination given
the virus.

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Source: Jackson Hole Mountain Traveler
Sentiment Survey 2020

Travelers are turning
to Reddit for advice,
travel updates,
proactive
preparation, stories
& future predictions.

Source: Seer Interactive, *Reddit scrape
reveals 5 themes among audiences with
Covid-19 concerns.* Apr 14 2020



Right now, the travel industry is not
meeting those demands.

We ignore these traveler needs at our own risk.

New research reveals that leaving these **needs** unmet will more likely deter a booking than **price**.





Covid-19 has already changed how we travel

Flexibility in bookings is now a must. And travel insurance purchases are on the rise.

We're getting away for **longer**. Short-term accommodation rentals are averaging 8.5-9 day stays, vs 3.5-5 days pre-pandemic.

More people are turning to travel advisors (agents) to help them **maximize plans** for future trips.

In summary...

- **There are no certainties when it comes to Winter 2020 volume predictions**
 - Interest in travel is high, but so are nerves
- **We're finally adjusting to masking, social distancing**
 - Reminding vs. enforcing
- **Most of all, travelers crave safety and savvy**
 - They want to feel like they're making the right decision, reducing risks, and getting the most out of their travel experience
 - All of this is key to getting people to book

Thought Starters

- **Is now the time to switch gears? From managing to driving?**
 - Average winter tourism ranges between 150-300,000 vs. 3-5M in summer
 - It seems likely we could get fewer visitors this year
- **IF we switch gears to drive mode...**
 - How do we keep it safe for the community & guests?
 - **Diversification:** Package alternate experiences under "The Last Real Mountain Town" platform to diversify awareness of activities, lessen burden on skiing
 - **Visitor Preparedness:** Optimize our time now to build out/make "Know before you go" as robust as possible



THANKS