

# H2R Market Research

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*Reveal Your Customer's Full Experience*



## ***Coronavirus Recovery Preparedness***

*Delivered May 2020*

# Overview

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**Purpose.** The purpose of conducting the Branson Coronavirus Recovery Preparedness Research was to better understand the current sentiment of prospective Branson visitors and to determine the best way to position the area for a safe return of visitation in the coming months.

**Target Audience.** This study was conducted among past Branson visitors who had previously provided their email address as part of the Branson Convention & Visitors Bureau's ongoing visitor intercept research program. This list was mindfully chosen as a base because it intentionally represents those people known to have visited Branson in the past. Thus, the intent was to measure the attitudes and opinions of people known to be past Branson visitors. Throughout this report this audience is referred to as Branson Visitors.

**Sample.** A total of 477 responses were collected for this research, providing for a maximum margin of error of +/-4.5% at a 95% confidence interval. The survey was conducted online over a 10-day period that began on Tuesday, April 28 and extended through Thursday, May 7, 2020. The average respondent invested 21.5 minutes completing their responses.

Branson Coronavirus Recovery Preparedness Research

# Key Findings



# Tale of Two Travel Populations

- Branson Visitors exhibit mixed attitudes and opinions. While the vast majority have been wearing masks when they are out in public (70%), fewer than half (46%) of those most likely to visit Branson first say they've been wearing masks away from home.
- There are also differing opinions on the types of places people feel safe visiting. Branson Visitors say they would feel safest visiting places like local supermarkets, parks/trails, outdoor attractions and activities, hotels/resorts, vacation rental homes, churches/places of worship, restaurants/bars and shopping centers. Conversely, the places they would feel least safe visiting include international flights, cruise ships, conferences/conventions, off-site business meetings, indoor sporting events, schools/universities, and domestic flights. Bottom line, Branson is positioned better for success in 2020 than many of its traditional competitors.
- Additionally, more than half say they intend to take a domestic leisure trip in the next 3 months. But, likewise, nearly as many say they will not likely resume travel this quickly.



## First to Return Will Likely Look Different

- In order to feel comfortable with resuming leisure travel, respondents say they would like to see local and/or statewide stay-at-home restrictions lifted (47%). This is good because it is largely already happening in most states. But other cues sought include the federal government/CDC giving an “all clear” for travel in the U.S. (46%) and another 45% would like to see an approved vaccine implemented before they are comfortable traveling. This contributes to the bifurcation seen among travelers.
- Overall, 54% of respondents indicate they would visit Branson in the next three months. And, nearly one-quarter say they would be among the first to return—with those under 55 and living within 150 miles of the area most likely to be the first to return. Nearly half said it may take a while, but they suspect they will be back to the area later this summer or early fall. Finally, nearly one in five said they probably will not visit Branson this year.
- When returning to Branson, respondents say they feel that shows/theaters (84%), shopping (67%) and beautiful scenery (63%) will be most important to their visit. This is good news, but interesting, because these same respondents also indicated that “indoor attractions” were something they would not yet feel safe visiting. This is an area where additional follow-up questions will likely be required in future surveys to better understand at a deeper level how such decisions will be made.



## Key Messages Should Focus on Safety

- Branson Visitors feel that the most appropriate types of messaging destinations can use in these uncertain times include the actions businesses are taking to keep guests safe and healthy (83%). Additionally, they would like to see messaging that reminds them Branson is open for business (78%) as well as offers for discounts, deals or bargains (74%). However, the most motivational ads (in their minds) would be ads that feature offers for discounts (75%) and/or messaging about the safety precautions businesses are taking (74%). Overall, the most important message that Branson Visitors say they want and need to hear from Branson is information regarding what area businesses are doing to keep visitors safe. In the end, this response topped the need for discounts by a margin of nearly 2:1.
- This aligns with the issues that create trepidation among Branson Visitors. More than two-thirds say they are nervous that destinations won't do enough to keep their visitors safe and/or other guests will not social distance or will get too close to them. These are issues with which we must all be aware and taking actions to avoid.



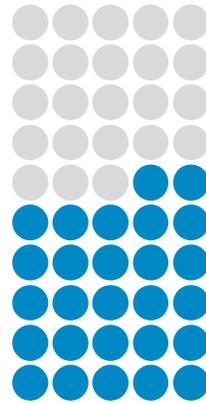
## Most Popular Design Changes

- The preferred types of design changes most desired by Branson Visitors also may very well be the easiest and least expensive to implement. That is, deep cleaning of surfaces (81%) was the single most popular idea evaluated—we just need to make sure potential visitors know all the things each hotel, show, attraction, restaurant, shopping center, etc. is doing to keep them safe.
- Similarly, hand sanitizers being installed in convenient locations (78%) placed second in importance, screening employees prior to their shifts (76%) placed third and capacity limits at the door/gate (63%) are the fourth most popular idea evaluated. Conversely, on the other end, far fewer Branson Visitors liked the idea of more intrusive measures such as requiring “immunity passports” (28%), asking every visitor to wear a mask (40%) or even taking temperatures at the door (56%).



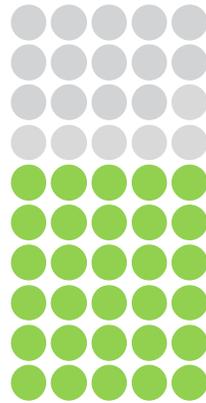
# Branson Recovery Preparedness

## KEY PERFORMANCE INDICATORS



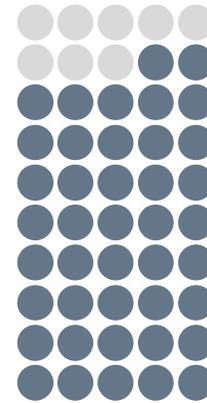
**54%**

of respondents say they intend to visit Branson this year



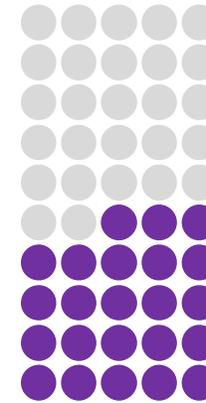
**60%**

will visit Branson by the end of summer 2020



**84%**

believe shows/theatres are among the most important activities to their next visit to Branson



**45%**

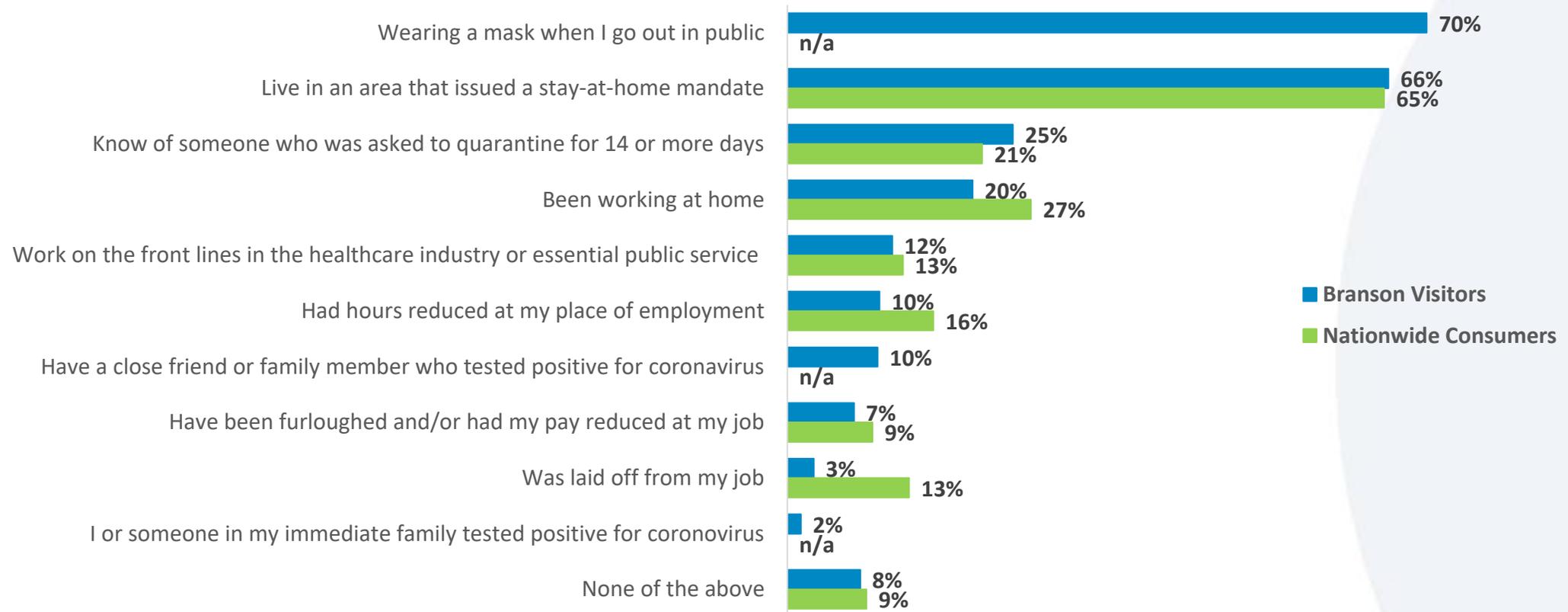
stated the **one** message that would make them feel the safest about visiting Branson would be about the actions businesses are taking to keep them safe

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# General Outlook

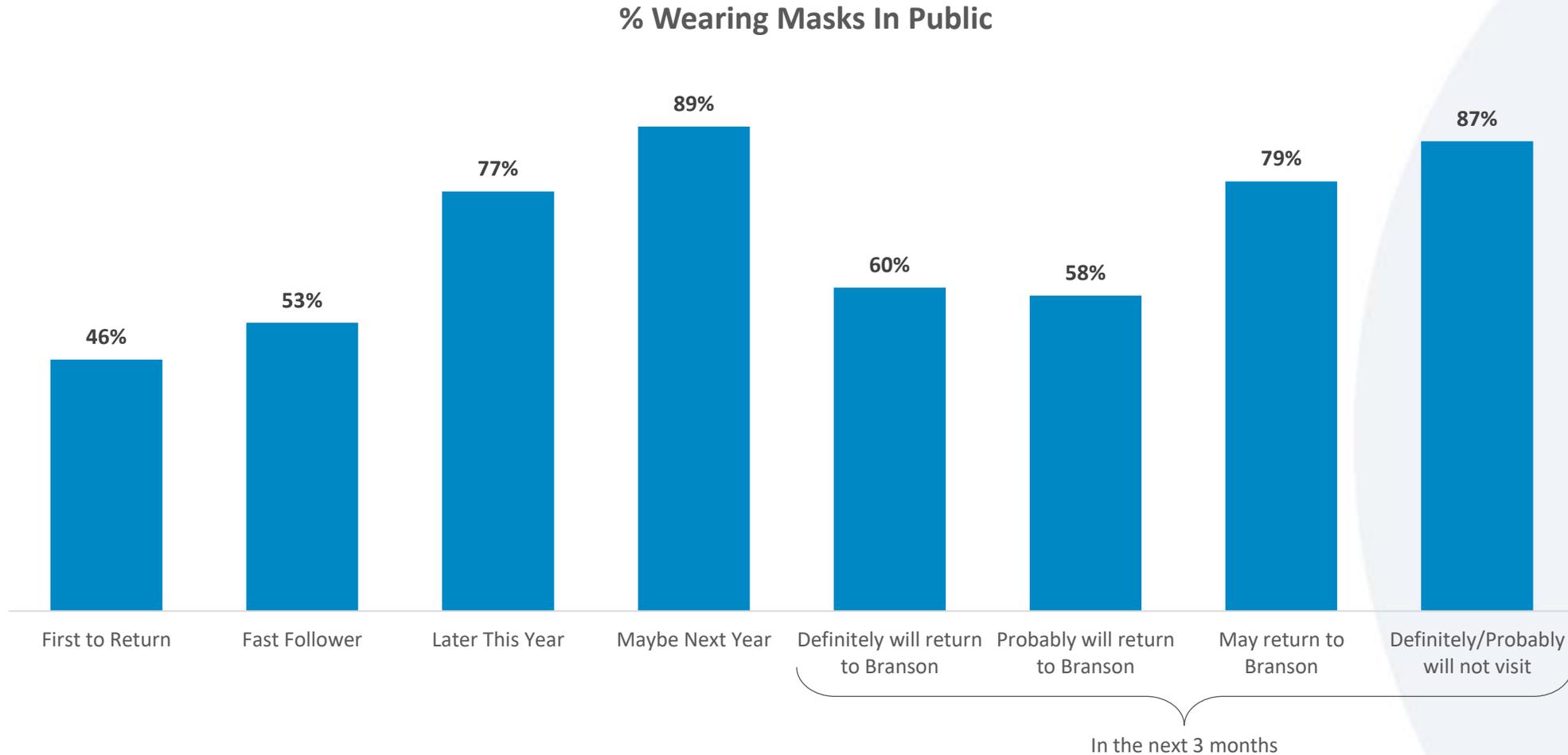
# Seven in ten Branson Visitors now wear a mask when in public, and 66% live in an area that issued a stay-at-home mandate—similar to nationwide trends.

## Affects of the Coronavirus Pandemic



Q5: How, if at all, have you been affected by the coronavirus pandemic?  
Please select all that apply.

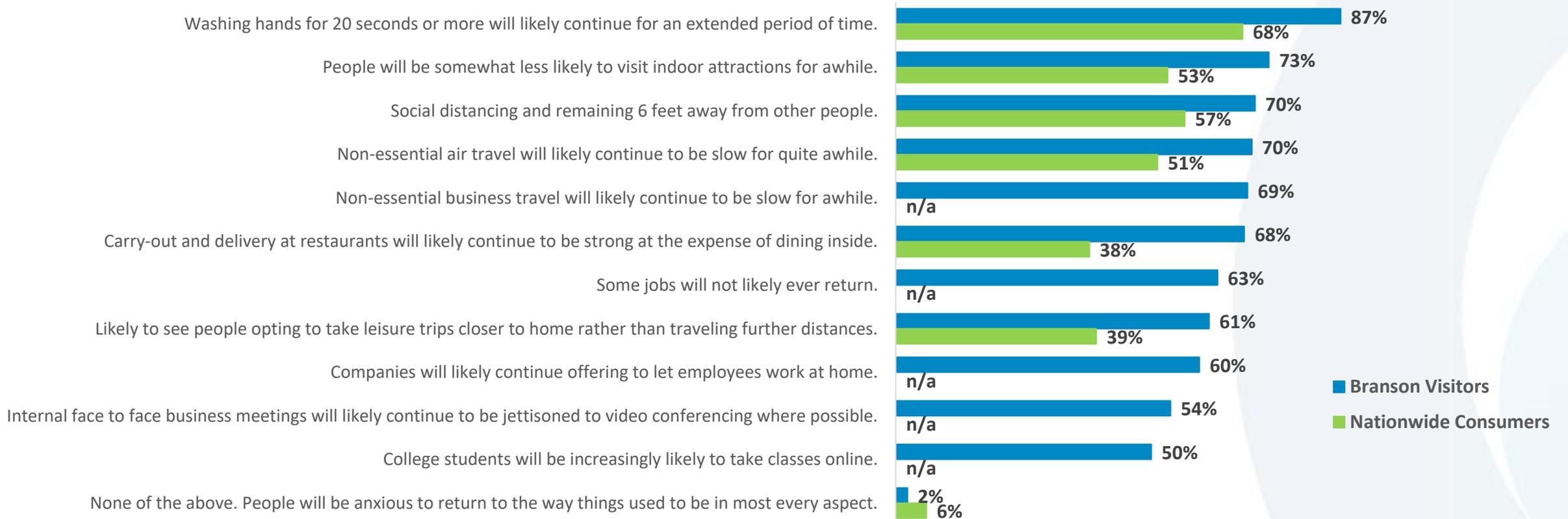
# While most Branson Visitors wear masks away from home, those most likely to visit or to be among the first to return to Branson are wearing masks in substantially lower numbers.



Q5: How, if at all, have you been affected by the coronavirus pandemic?  
Please select all that apply.

# Branson Visitors expect handwashing, avoiding indoor attractions in general, social distancing and avoiding non-essential air travel will stick around for awhile after the immediate crisis is over.

## Longest Lasting Affects of the Coronavirus Pandemic



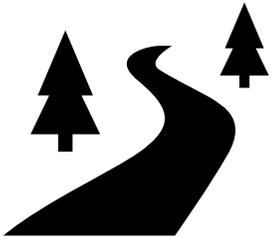
Q9: After the immediate crisis caused by the coronavirus pandemic is over, which of the following new consumer behaviors do you believe may last for a prolonged period of time?  
Please select all that apply.

# The places Branson Visitors feel safest visiting today include essential businesses like grocery stores and outdoor activities like parks/trails or outdoor attractions.



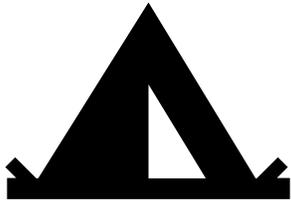
**71%**

*Grocery Stores/  
Supermarkets*



**62%**

*Parks/Trails*



**52%**

*Outdoor Attractions*



**38%**

*Hotels/Resorts*



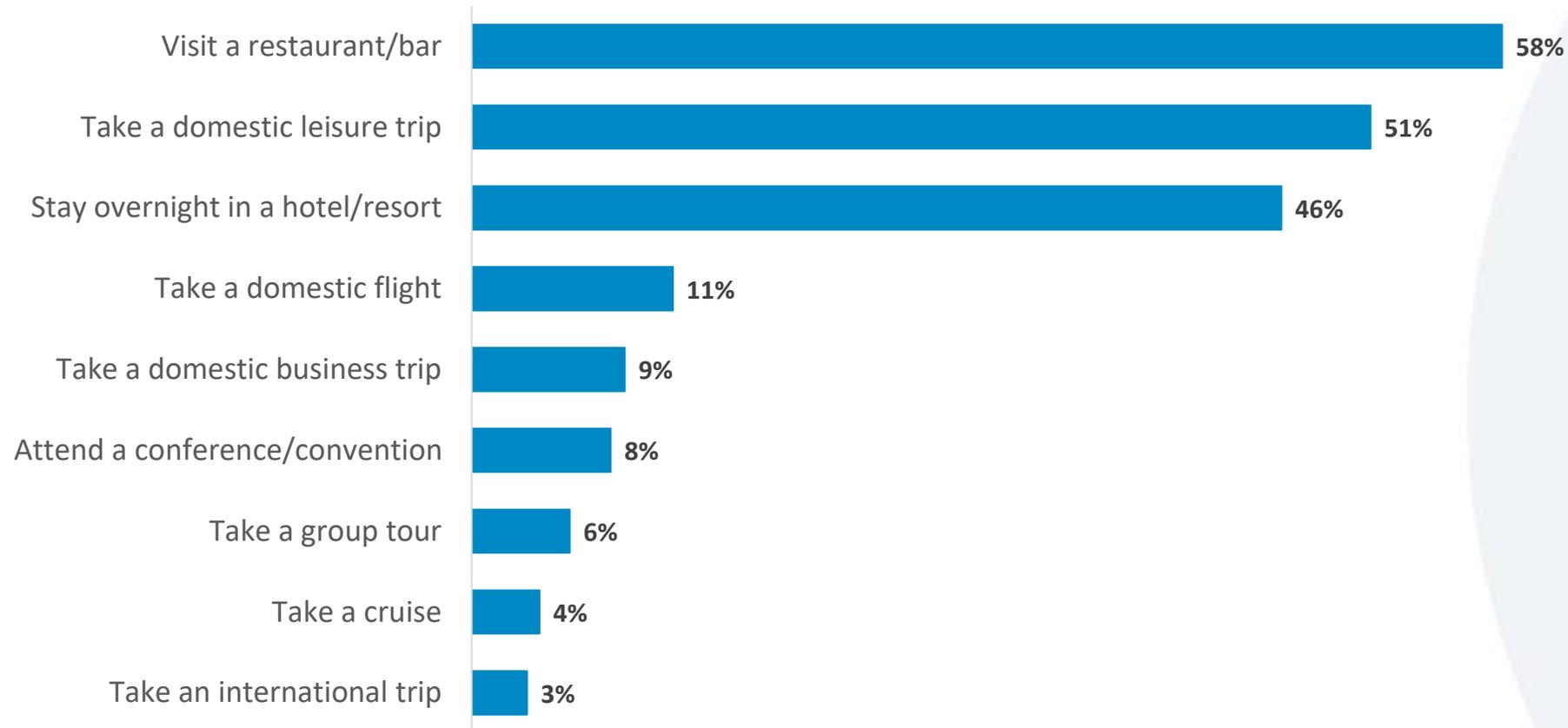
**37%**

*Vacation Homes/  
Condos*

Q8: Please indicate which, if any, of the following locations or activities you would feel safe visiting today. Please select all that apply.

# Over the next 3 months, Branson Visitors said they are most likely to visit restaurants, take domestic trips and stay overnight in a hotel/resort.

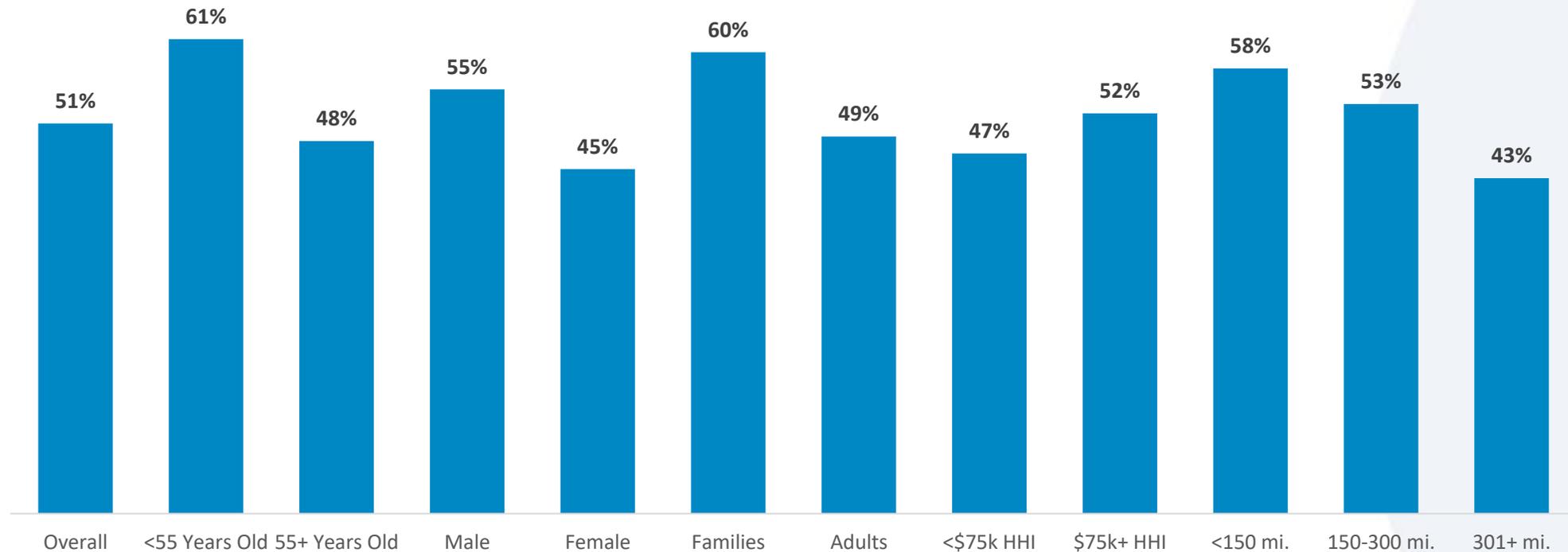
% Probably/Definitely Will Do the Following in the Next 3 Months



Q10: Using the scale provided, please indicate how likely you are to engage in each of the following activities in the next 3 months.

# Those most likely to take a domestic leisure trip in the next 3 months include people under 55, families with children, those living within 150 miles of Branson and men.

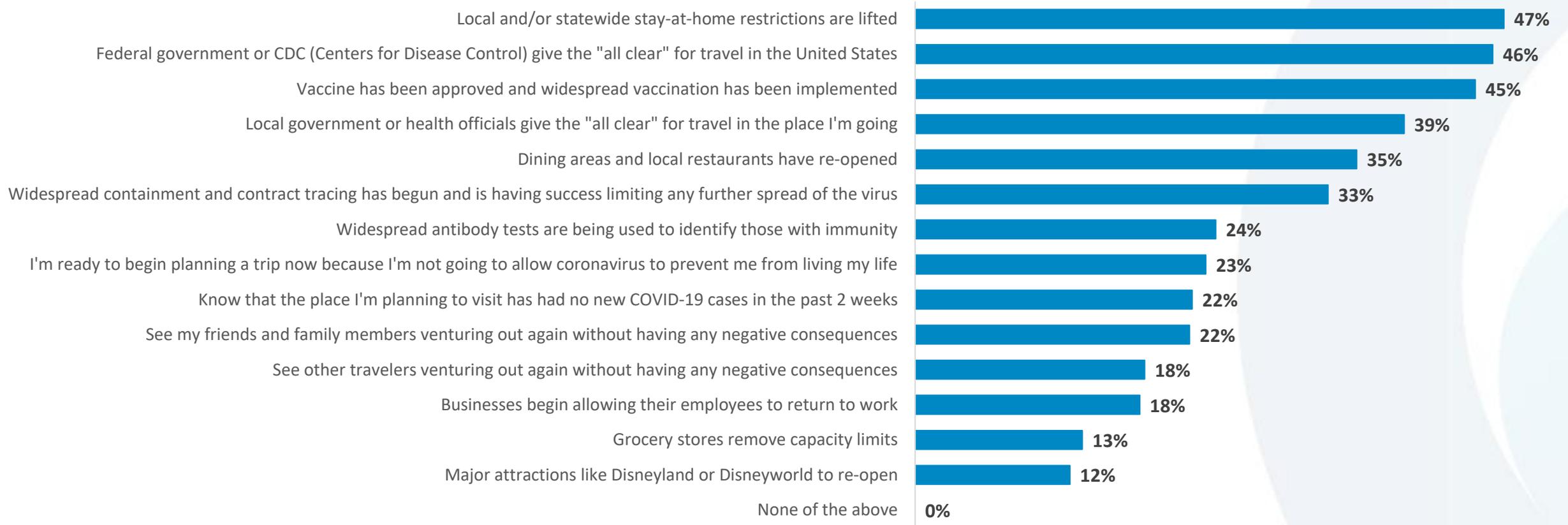
% Probably/Definitely Will Take a Domestic Leisure Trip in the Next 3 Months



Q10: Using the scale provided, please indicate how likely you are to engage in each of the following activities in the next 3 months.

# The lifting of local/statewide stay-at-home orders is the strongest environmental cue Branson Visitors are looking for in order to feel comfortable traveling again.

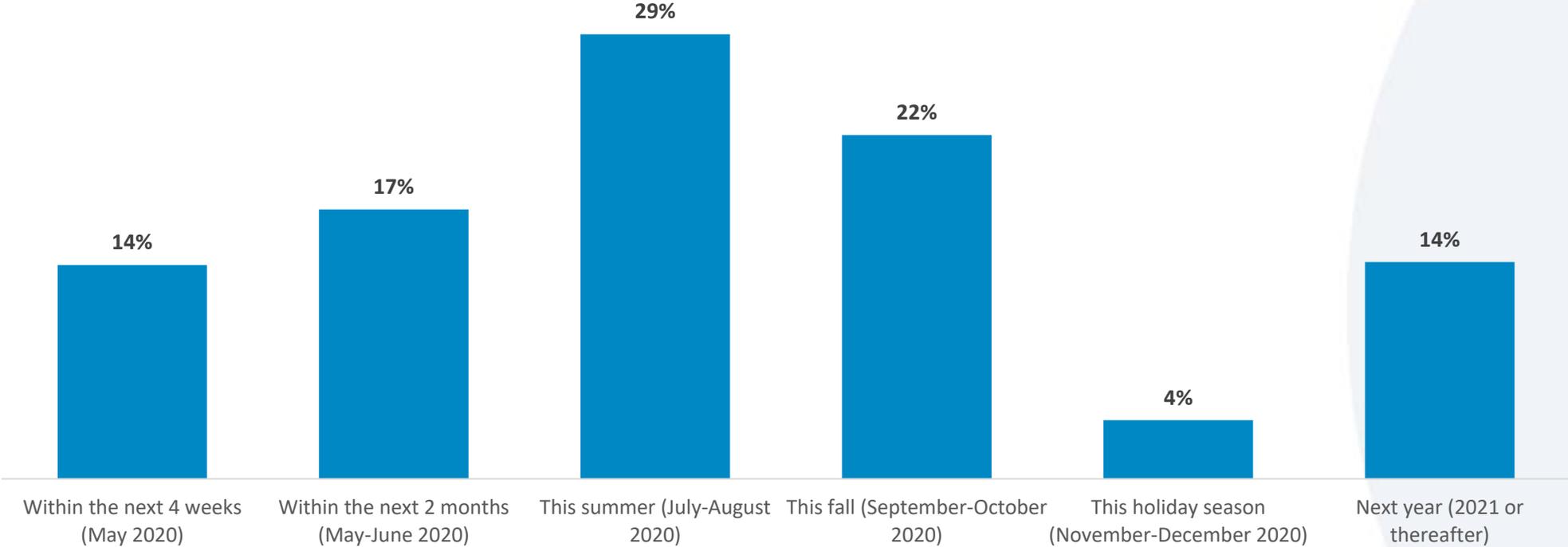
## Environmental Cues Needed to Feel Comfortable Resuming Leisure Travel



Q11: What environmental cues or signals will you want to see in order for you to feel comfortable resuming leisure travel again? Please select your top 4 choices.

# Six in ten said they will take their next leisure trip sometime in the next 4 months, while the remaining 40% said it will likely be this fall or later before they travel for leisure.

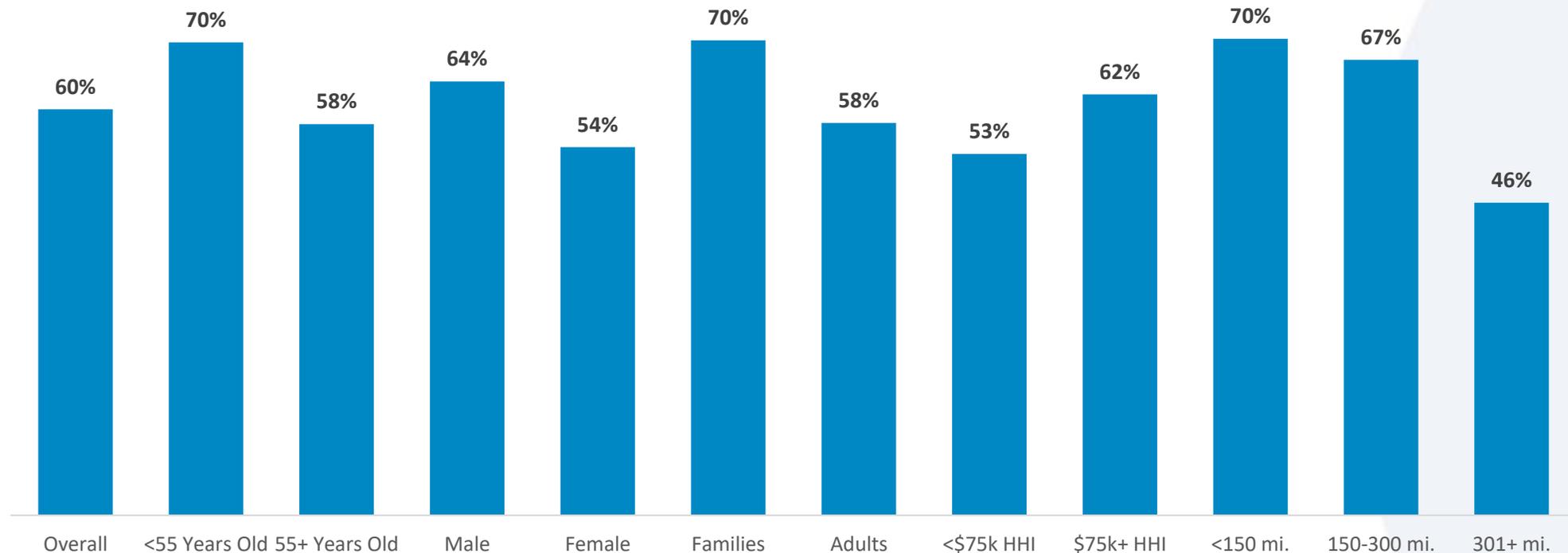
When Feel Comfortable Taking Next Leisure Trip



Q12: When do you think you will feel comfortable taking your next leisure trip?

# Those most likely to feel comfortable traveling for leisure this summer skew toward those living within 150 miles, families with children, people under 55 years and those living within 300 miles from Branson.

% Likely to Feel Comfortable Traveling for Leisure by the End of Summer

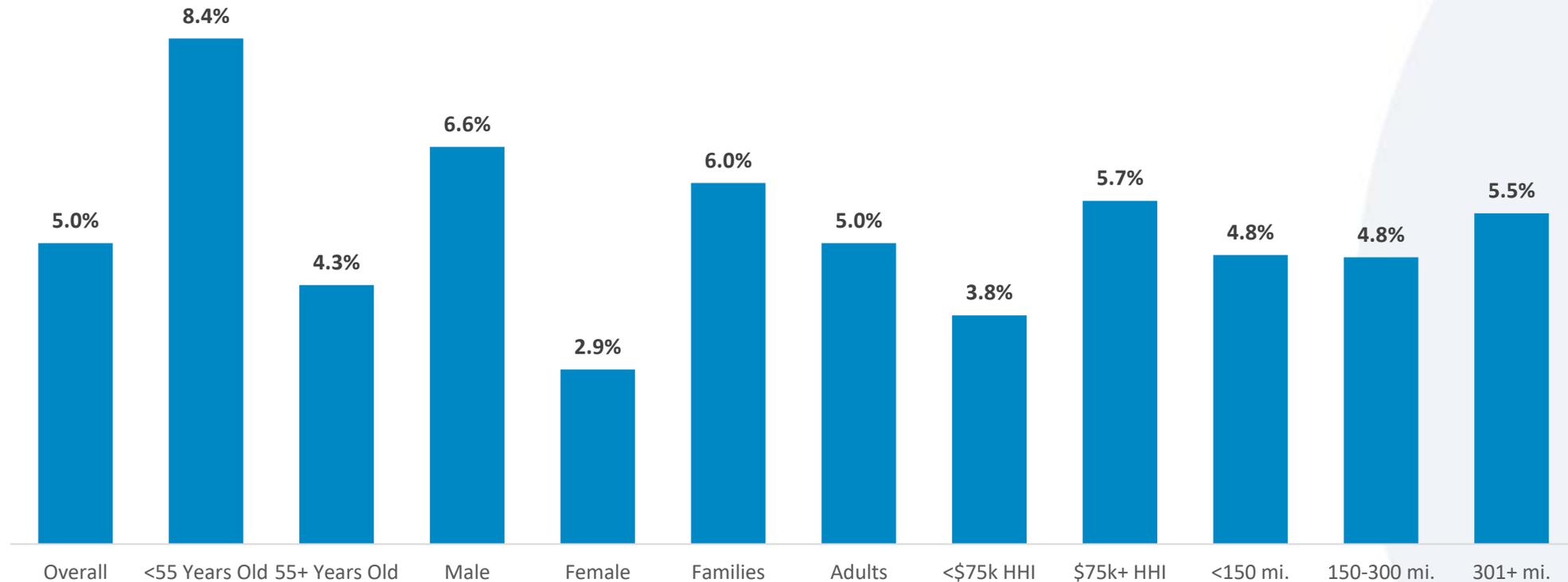


Q12: When do you think you will feel comfortable taking your next leisure trip?



# Very few (5%) intend to travel outside of the U.S. in the next 6 months. But those who do intend to travel internationally skew toward people under 55 years, men and families.

% Probably/Definitely Will Travel Outside of the United States in the Next 6 Months



Q14: How likely are you to travel outside the United States in the next 6 months?

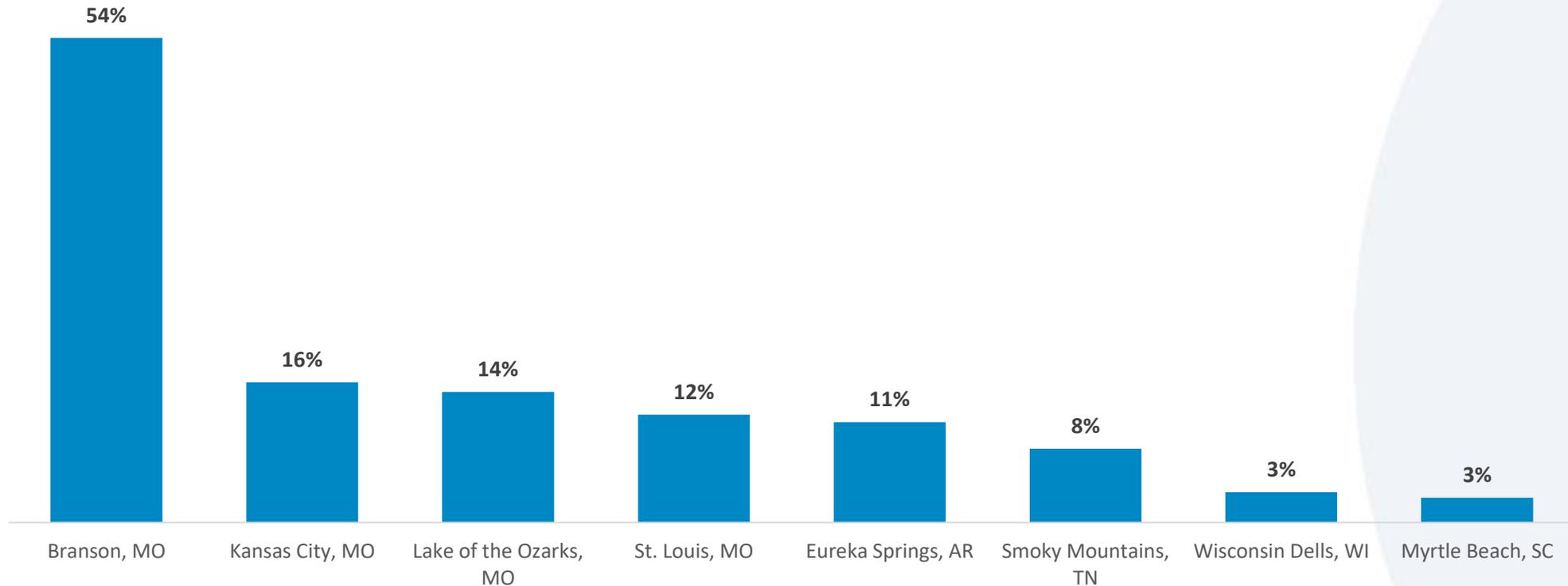
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# Branson Visitation Outlook



# More than half (54%) of Branson Visitors said they intend to visit Branson again in the next 3 months, and some also plan to visit other destinations as well.

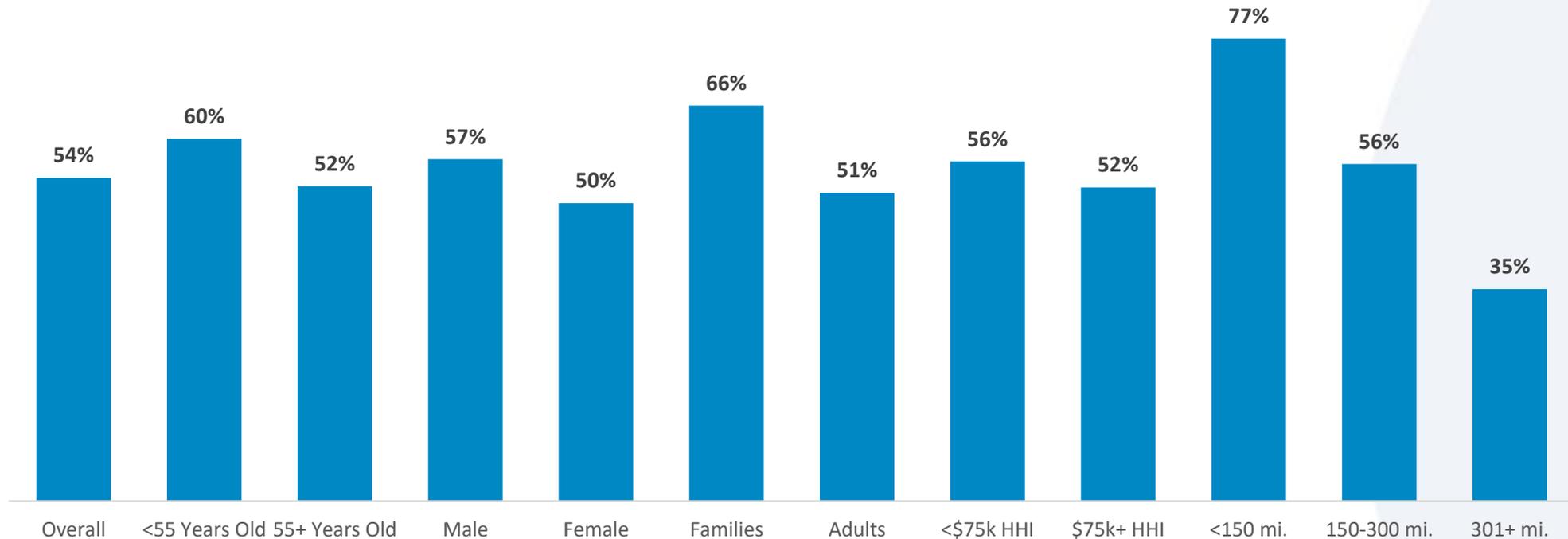
% Probably/Definitely Will Visit Destinations



Q15: How likely are you to visit the following destinations in the next 3 months?

# Those who say they are most likely to visit Branson in the next 3 months include people living within 150 miles, families with children, people under 55 years, men and those with incomes under \$75k.

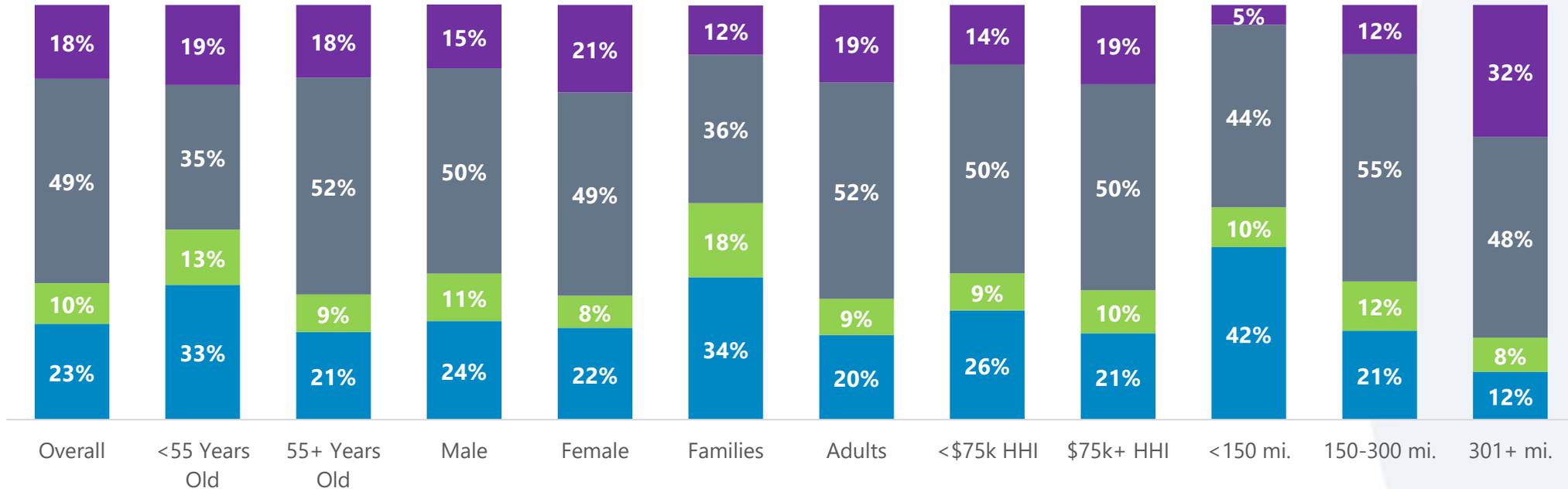
% Definitely/Probably will visit Branson in the next 3 months



Q15: How likely are you to visit the following destinations in the next 3 months?

# Most plan to return to Branson later this summer or early fall. Similar to prior metrics, those under 55, families and those living within 150 miles will likely be among the first to return.

Best Describes Your Return to Branson Once Restrictions Are Lifted



■ Probably will not visit this year.

■ I will be back just as soon as I see others venturing out.

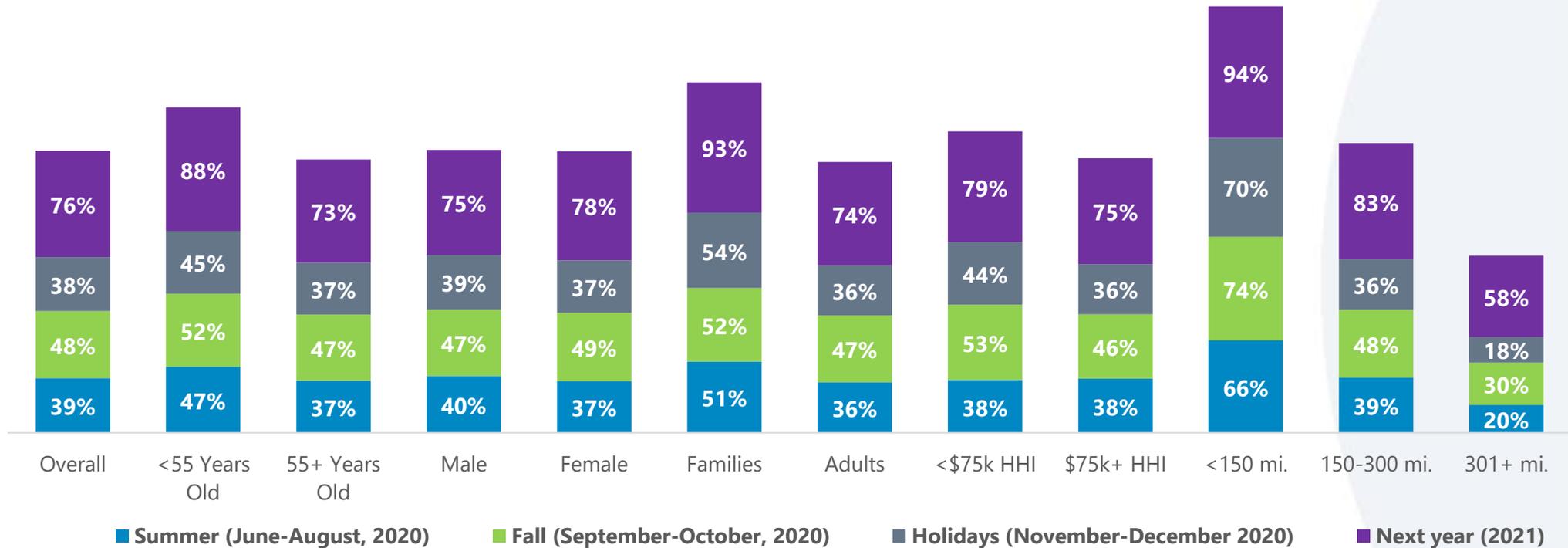
■ It will take a while, but I suspect I'll be back later this summer or early fall

■ I will be among the first to return.

Q16: Which of the following best describes when you see yourself returning to Branson, MO once restrictions are lifted?

# Full recovery may take awhile. In 2020, those living within 150 miles of Branson are the segment most likely to visit Branson—regardless of the season. However, all segments exhibit even stronger intent to visit in 2021.

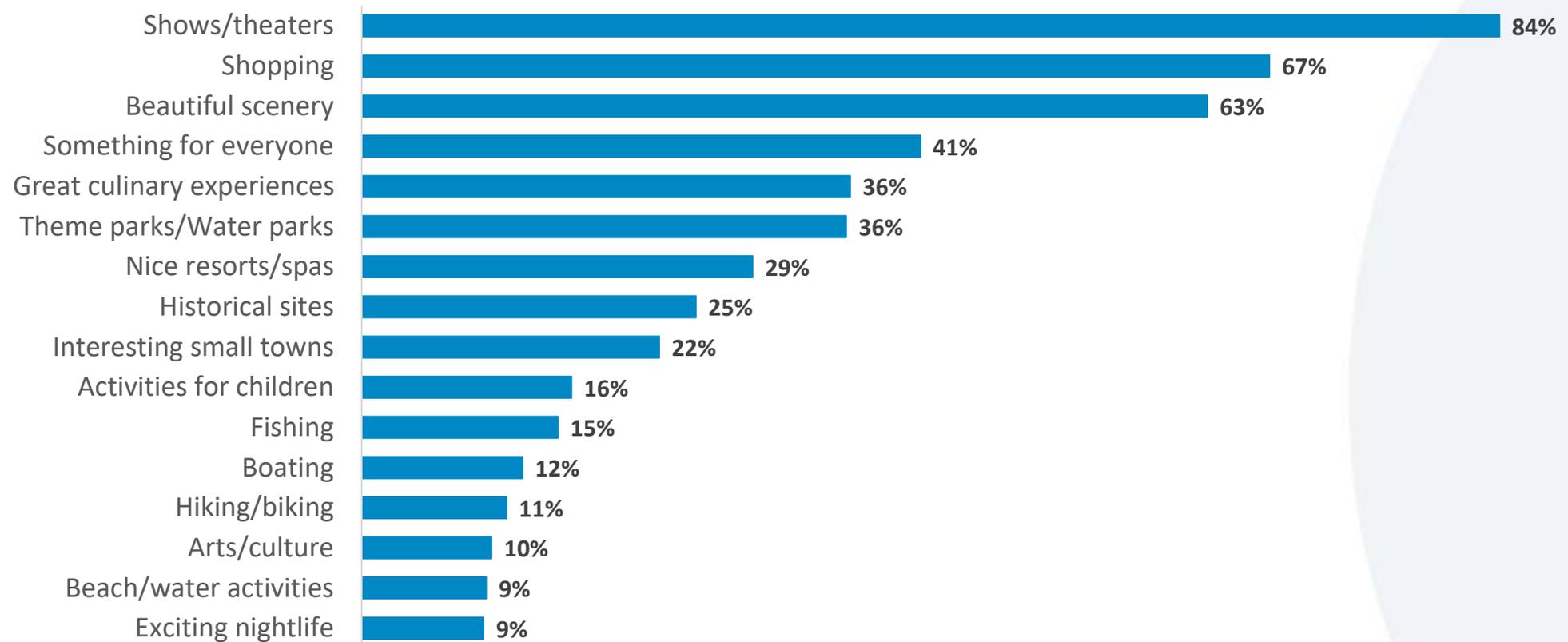
% Probably/Definitely Will Visit Branson in Each Season



Q17: Using the scale provided, please indicate how likely you would be to visit Branson, MO in each of the following seasons.

# When considering a return to Branson it is shows, shopping and beautiful scenery that Branson Visitors consider most important.

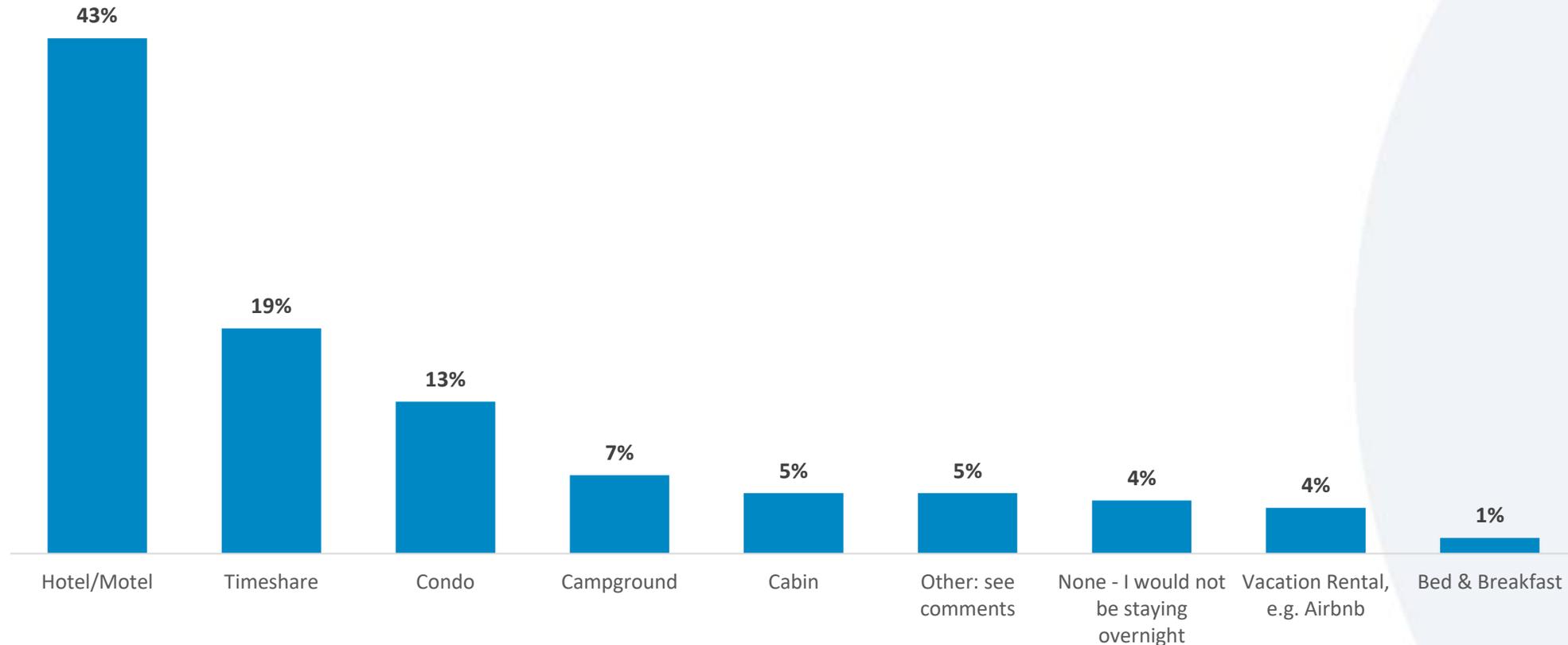
## Types of Experiences Most Important to Visiting Branson



Q18: Please indicate which of the following types of experiences are most important to you when visiting Branson, MO. Please select all that apply.

Those likely to spend the night in Branson on their next visit are planning to use hotels/motels. One in five plan to use a timeshare, and another 13% plan to rent a condo.

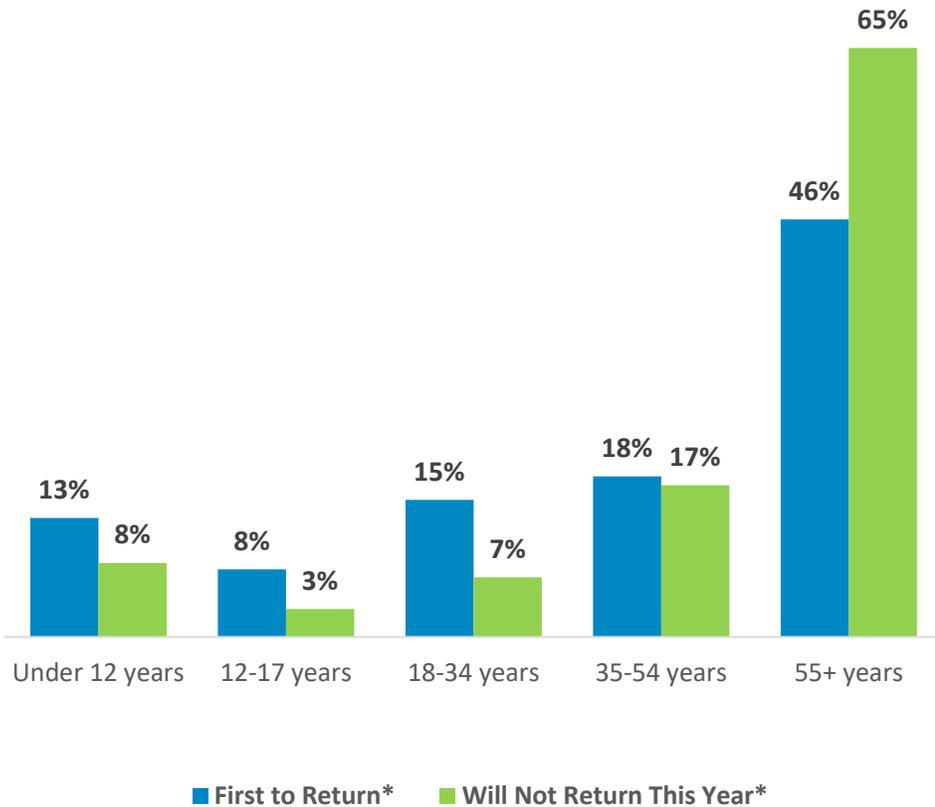
Type of Lodging Plan to Use on Next Branson Visit



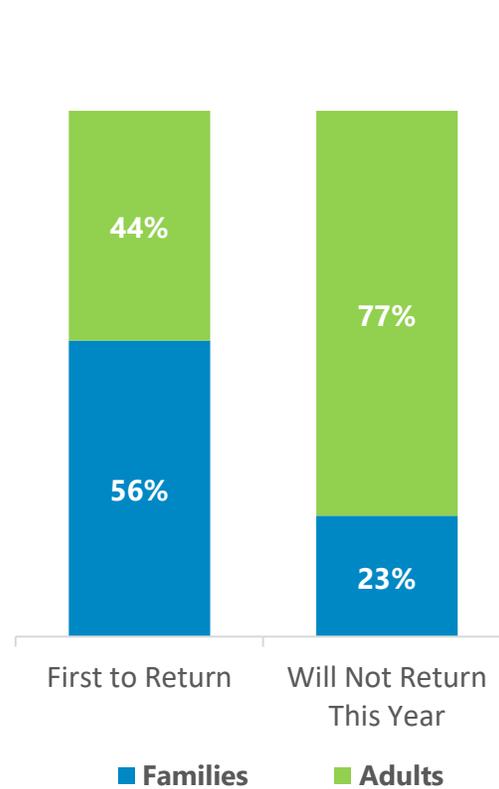
Q23: What type of lodging, if any, are you most likely to use on your next visit to Branson, MO?

# Compared to those who say they won't return this year, those who say they will be the "first to return" skew much younger, with children at home and would have a larger party size on their next potential visit.

Ages of Party on Next Visit



Party Composition



**56 | 62**  
Average Adult Age

**9.0 | 8.8**  
Average Child Age

**3.2 | 2.3**  
Average Party Size

**\$97k | \$109k**  
HH Income

■ First to Return\* ■ Will Not Return This Year\*

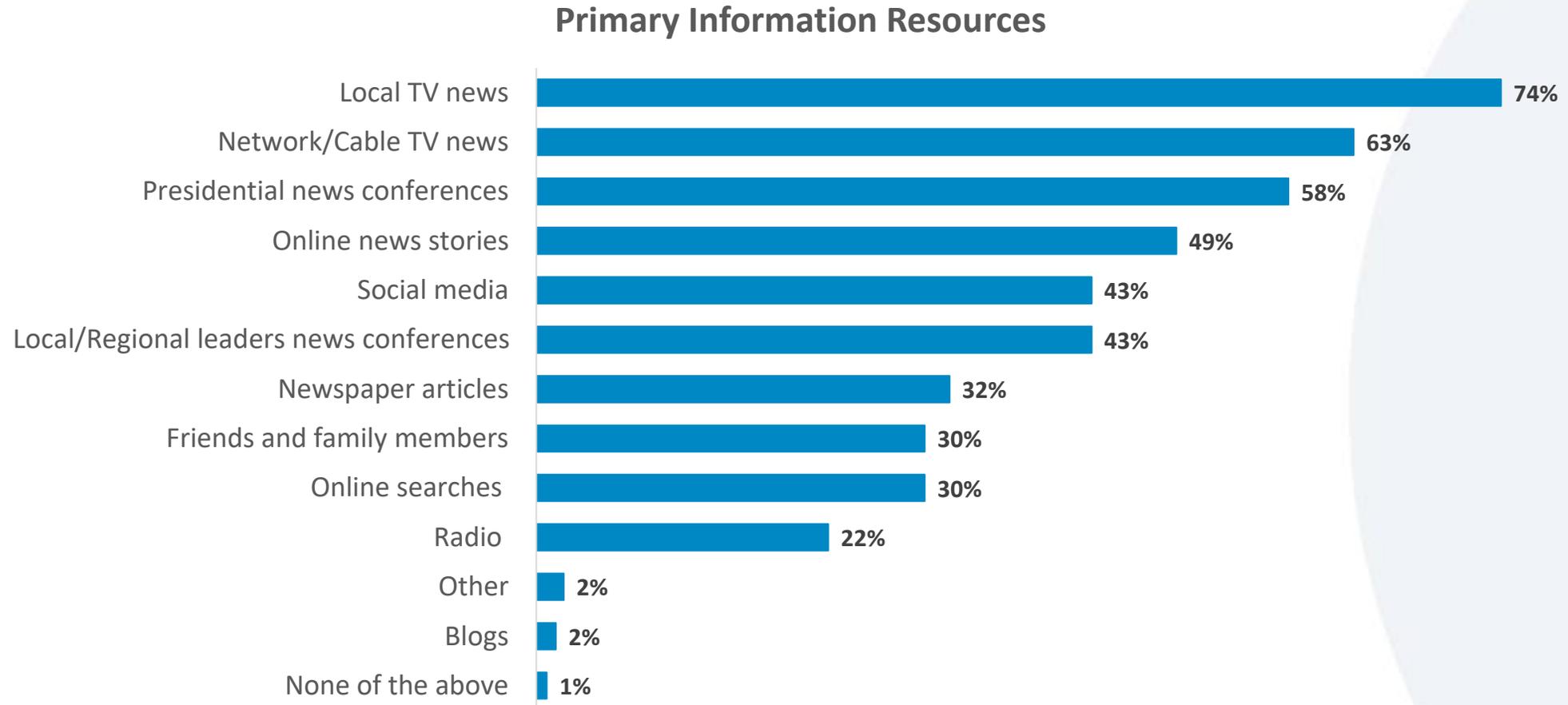
Q25: Including yourself, how many people in each of the following age groups do you believe will visit Branson, MO on your next visit?  
\*Self indicated in Q16.

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# Post-Viral Positioning



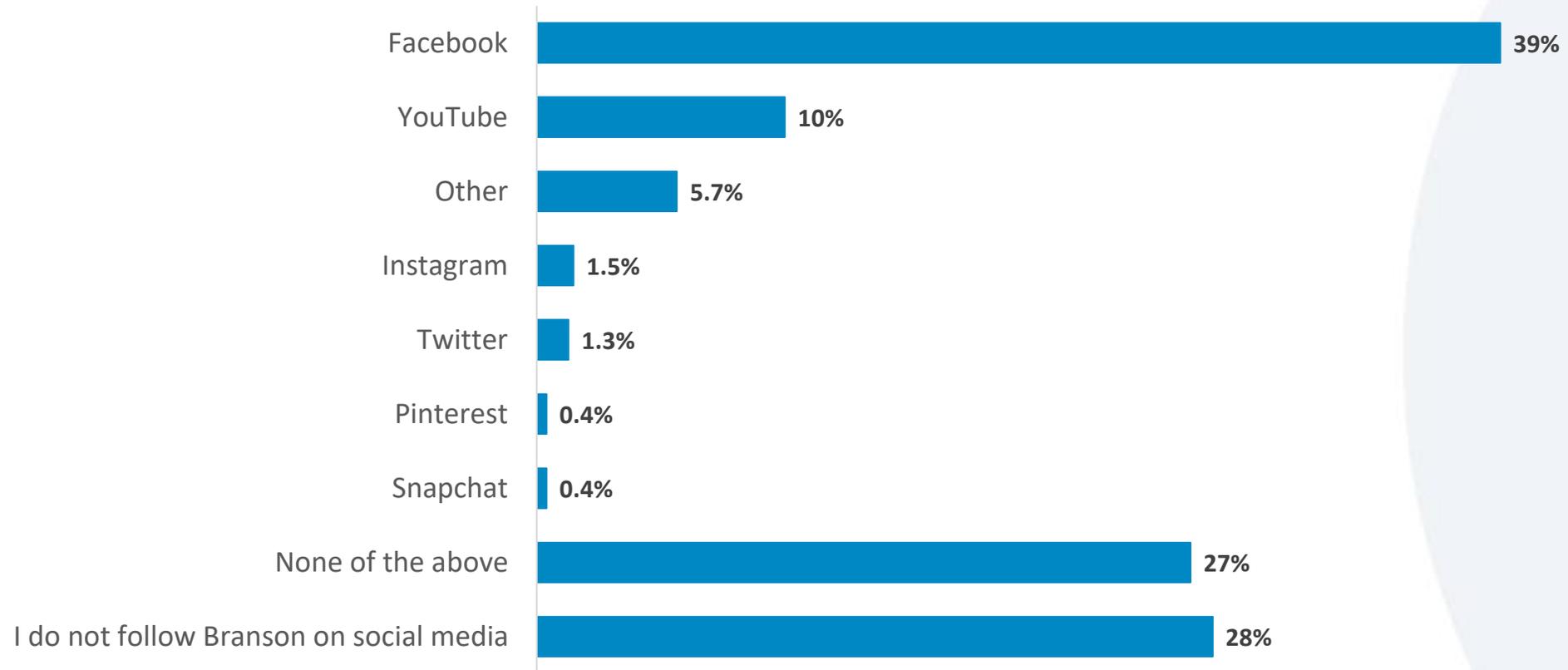
# Most Branson Visitors turn to their local TV news stations or network/cable TV news stations for information about the impact coronavirus is having on the U.S. and their community.



Q6: What resources, if any, are you primarily using to remain informed about the impact coronavirus is having on the U.S. and your community? Please select all that apply.

**Facebook is Branson's most popular social media channel, followed by YouTube. However, a good portion (28%) of Branson Visitors don't follow any of Branson's social channels.**

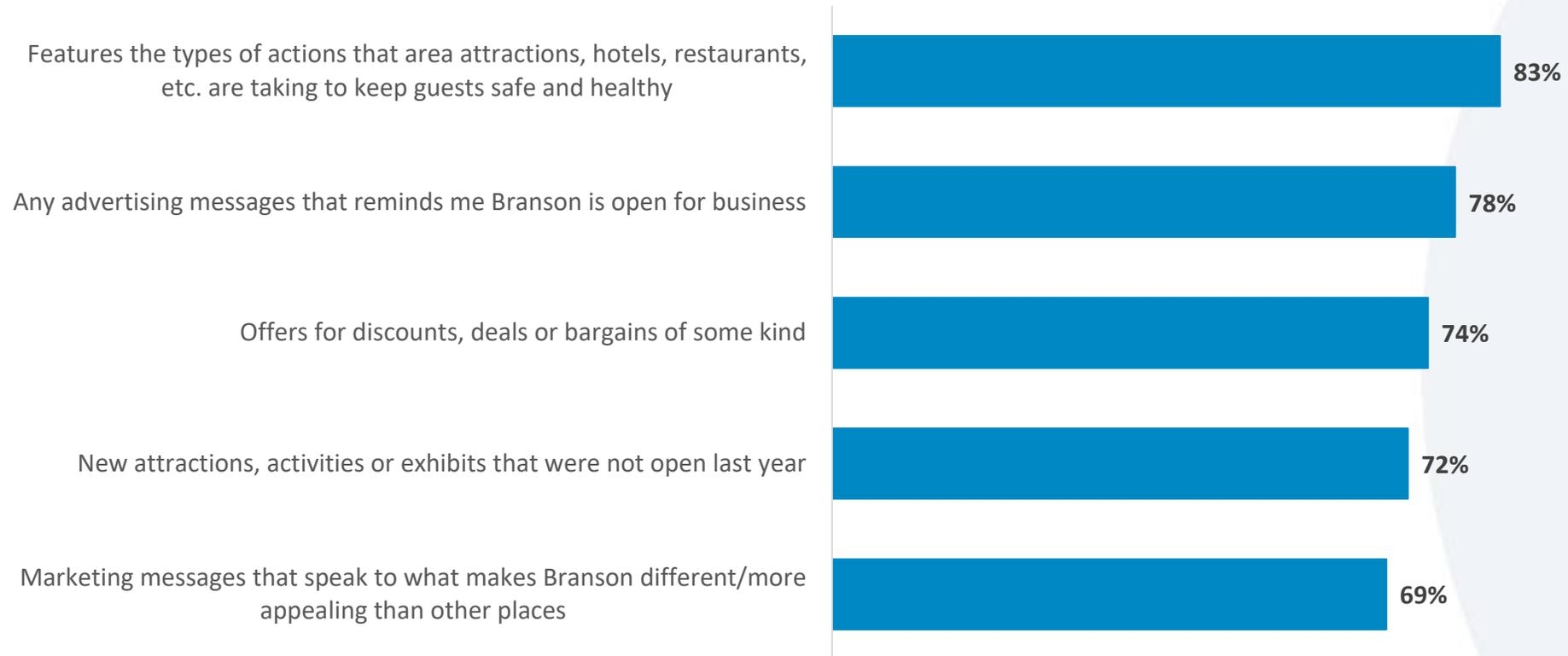
**Branson Social Media Channels Visited**



Q7: In the past year have you visited any of Branson's social media channels listed below?  
Please select all that apply.

# Travelers feel the most appropriate messaging will feature the types of actions area businesses are taking to keep guests safe and healthy, and that reminds them Branson is open for business.

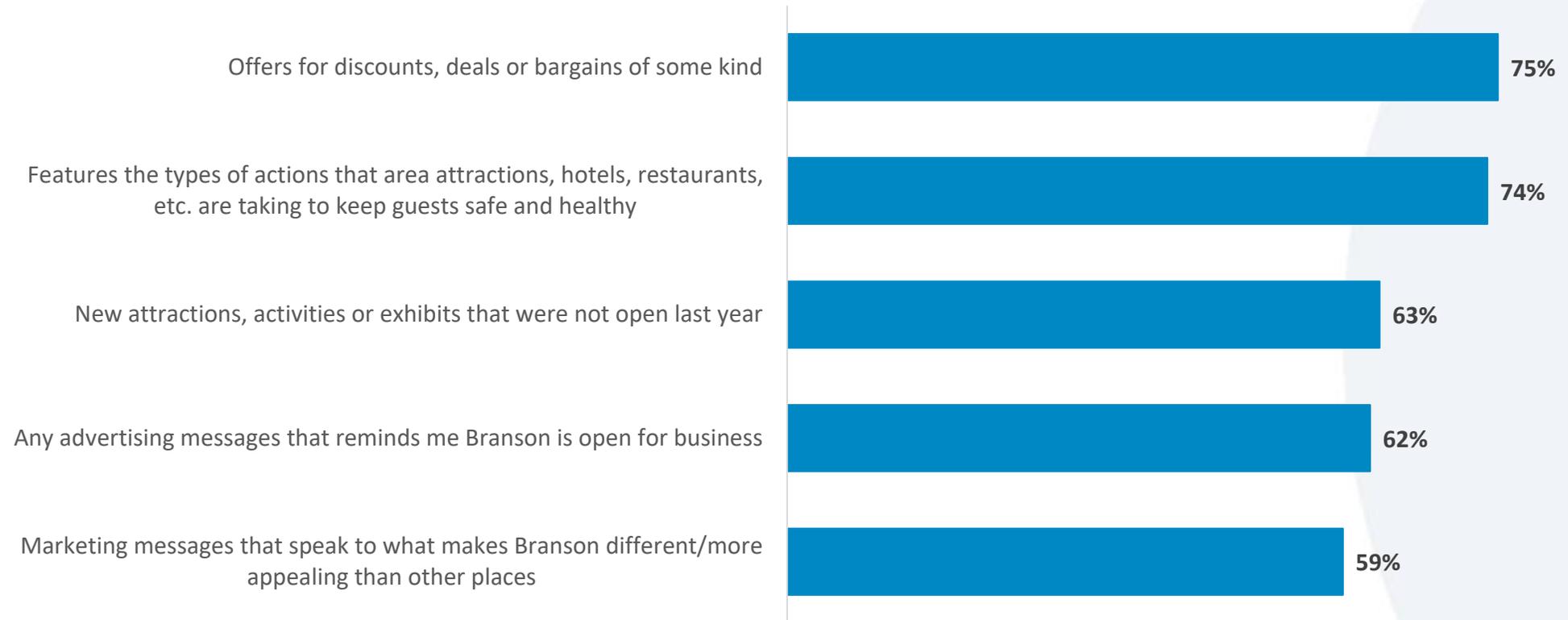
## % Somewhat/Very Appropriate Messaging



Q19: Using the scale provided, please indicate the level to which each of the following types of destination marketing messages would be appropriate given the times we are in today.

# The most motivational messages, however, are those that offer discounts and/or share the types of actions area businesses are taking to keep guests safe and healthy.

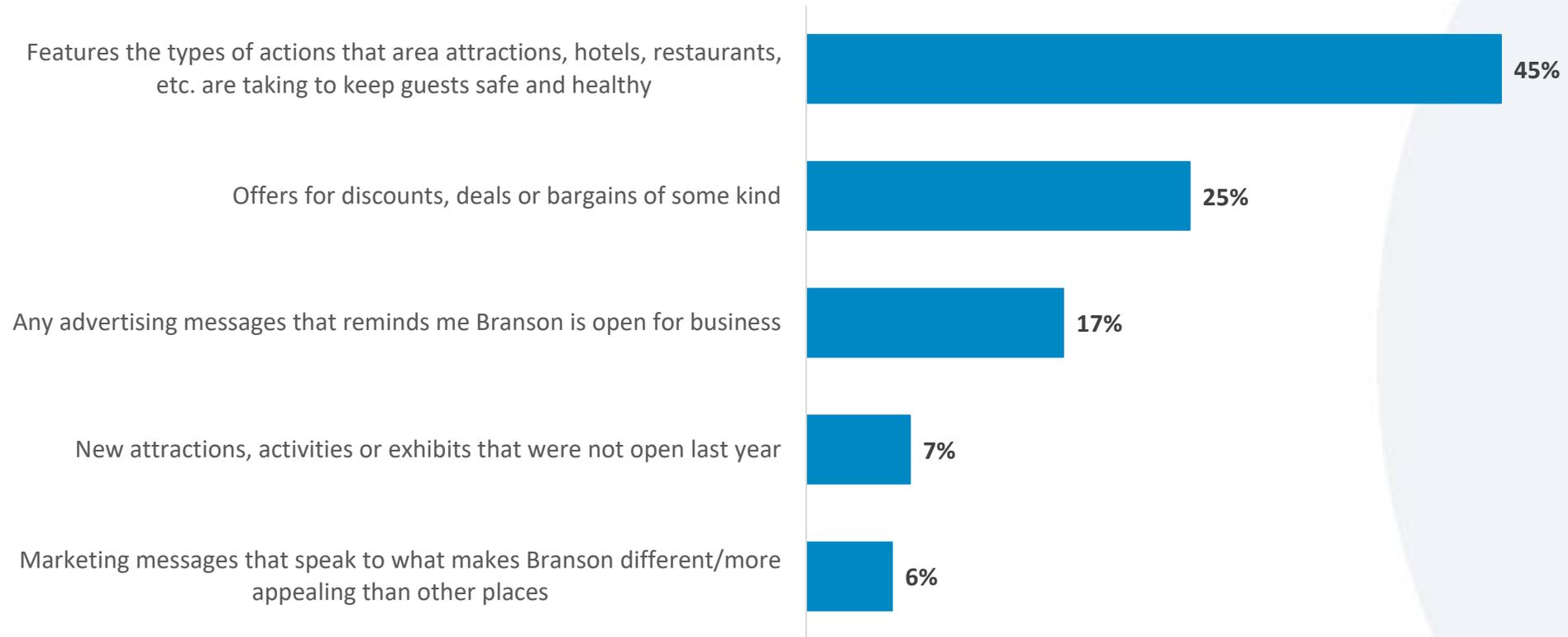
**% Very/Extremely Motivational**



Q20: Similarly, of those destination marketing messages you feel would be somewhat or very appropriate, please indicate how motivational or inspirational these same messages would be at encouraging you to take a leisure trip there.

**But, overall, the single most important message Branson Visitors want to hear from Branson is one that features the actions taken to keep visitors safe and healthy. Discounts fall to a distant second.**

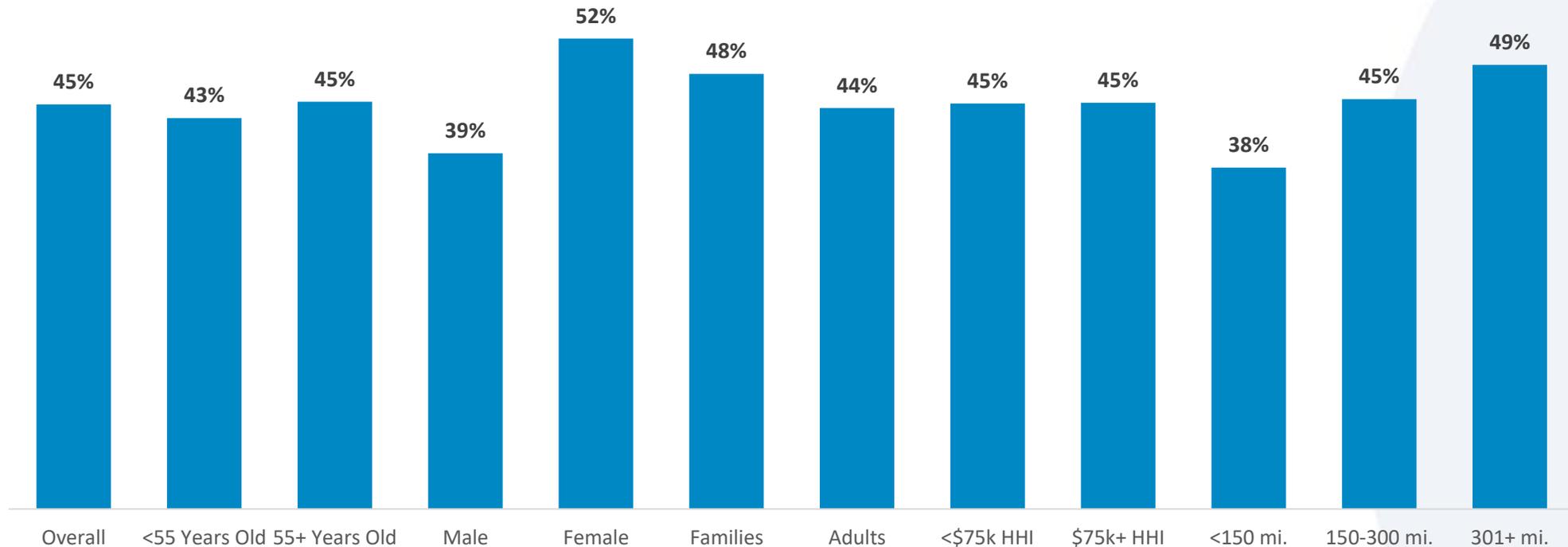
**Which ONE Message is Most Inspiring to Visit Branson**



Q21: Which one of these marketing messages, if any, do you believe would be most likely to inspire taking a leisure trip to Branson, MO?

# Those who would be most inspired to visit Branson by hearing about what actions are being taken to keep visitors safe include women, those living 150-301+ miles away and families with children.

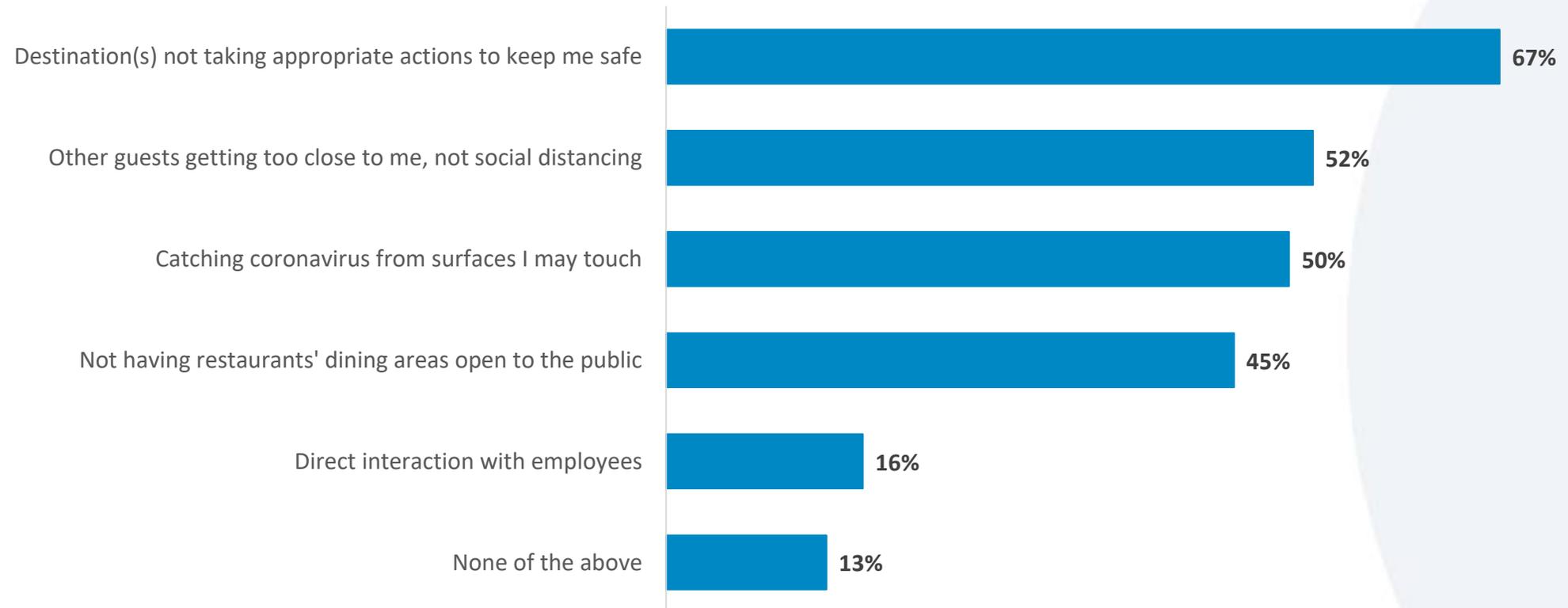
% Which ONE message is most likely to inspire you to visit Branson this year?



Q21: Which one of these marketing messages, if any, do you believe would be most likely to inspire taking a leisure trip to Branson, MO?

# Branson Visitors are most concerned about destinations not taking the appropriate actions to keep them safe and/or other people getting too close to them.

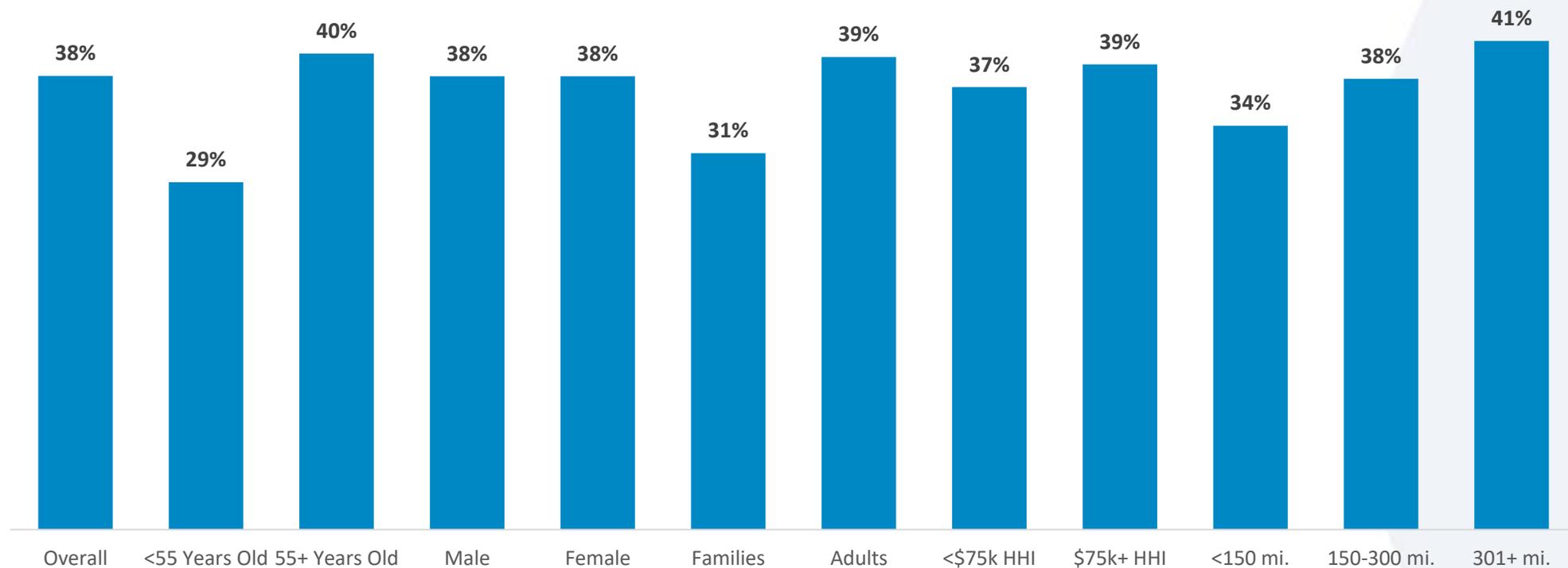
## Most Makes You Nervous About Traveling in the Near Future



Q26: What, if anything, makes you somewhat nervous about the idea of traveling again in the near future? Please select all that apply.

# Overall, nearly four in ten indicate they will wear a mask when visiting Branson in the future, with those over the age of 55 and who live farthest from the area most likely to do so.

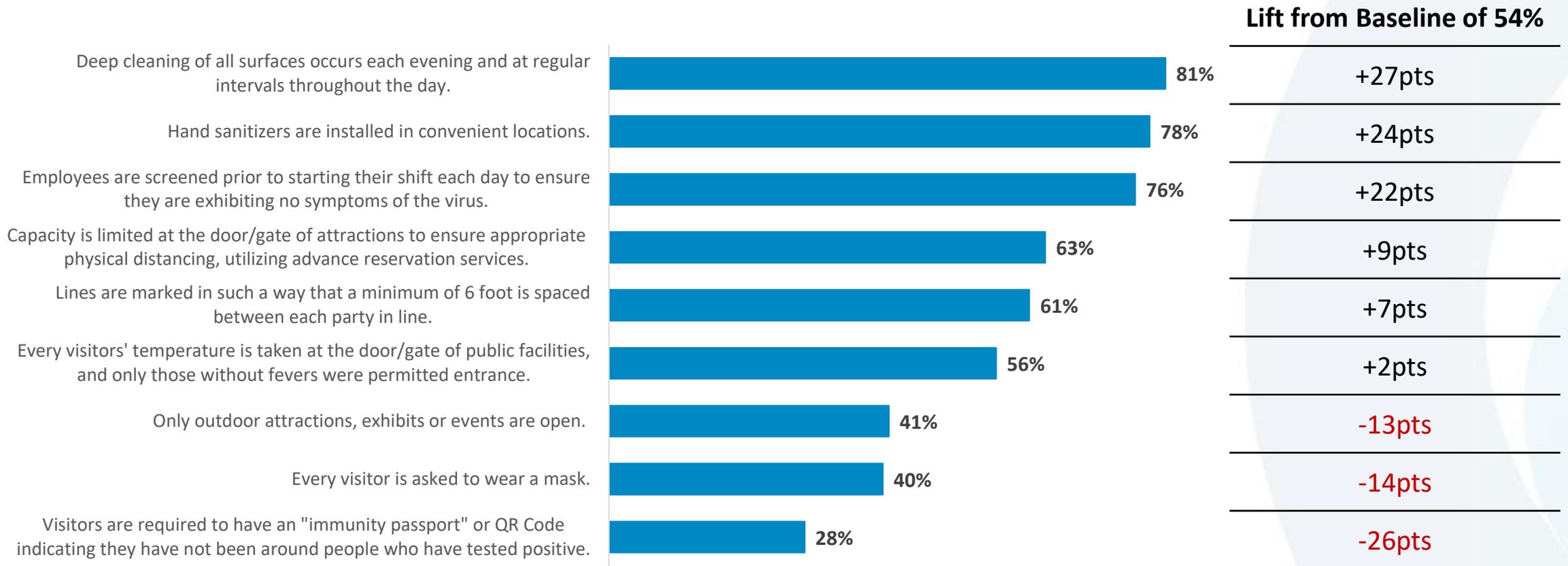
% Probably/Definitely Will Wear a Mask When Visiting Branson, MO



Q27: Using the scale provided, please indicate how likely would you be to wear a mask when visiting Branson, MO once you are allowed to venture out after coronavirus restrictions have been lifted?

# The actions most likely to inspire a visit to Branson appear to be the ones that would be the easiest to implement and the least intrusive, e.g. cleaning surfaces, hand sanitizers, etc.

## % Probably/Definitely Would Visit Branson with Actions Taken



Q28: Using the scale provided, please indicate how likely would you be to visit Branson, MO if you knew they were taking the following actions to minimize any further spread of the coronavirus.

# Thank You!



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