

Travel & Recreation Impacts from the Pandemic



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Personal Safety

Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale

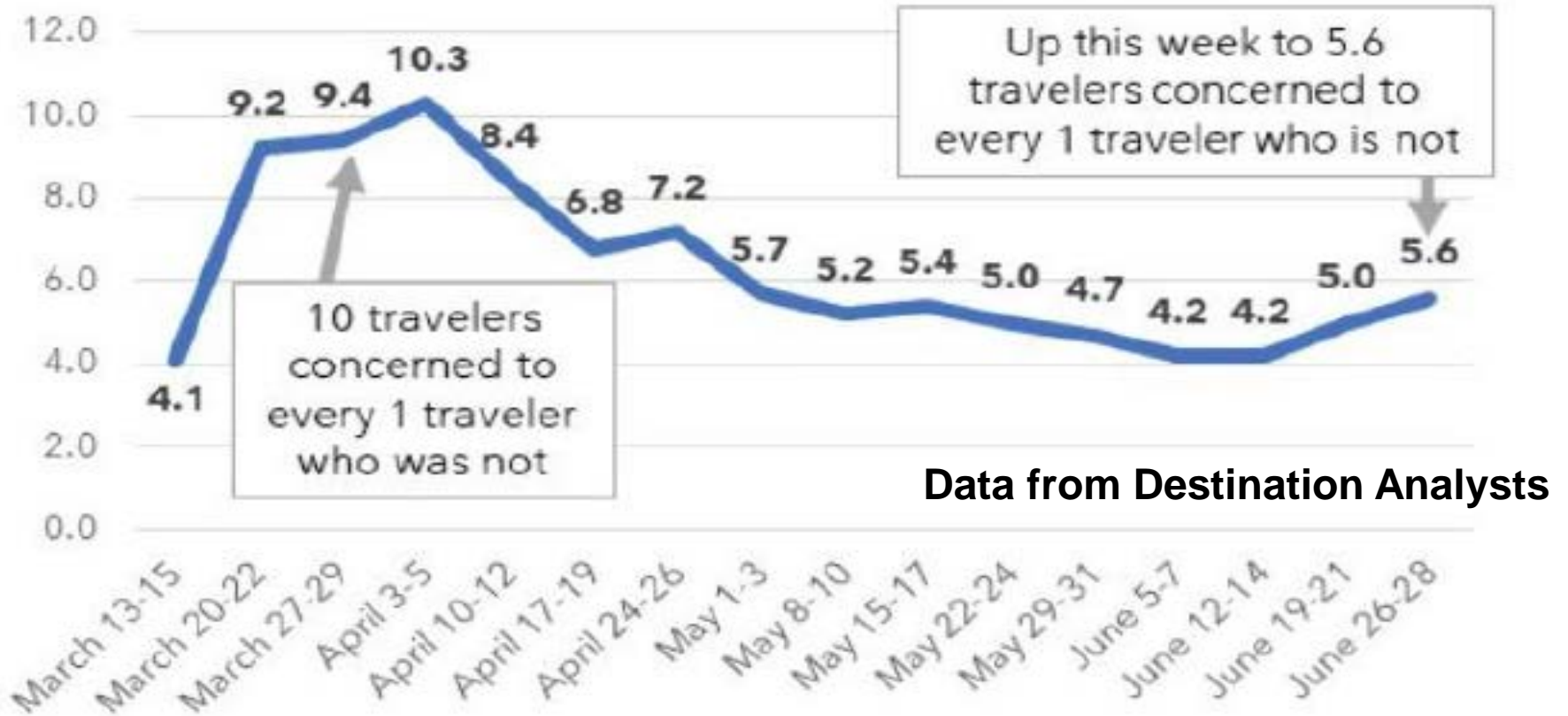


Data from Destination Analysts

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

Safety of Friends and Relatives

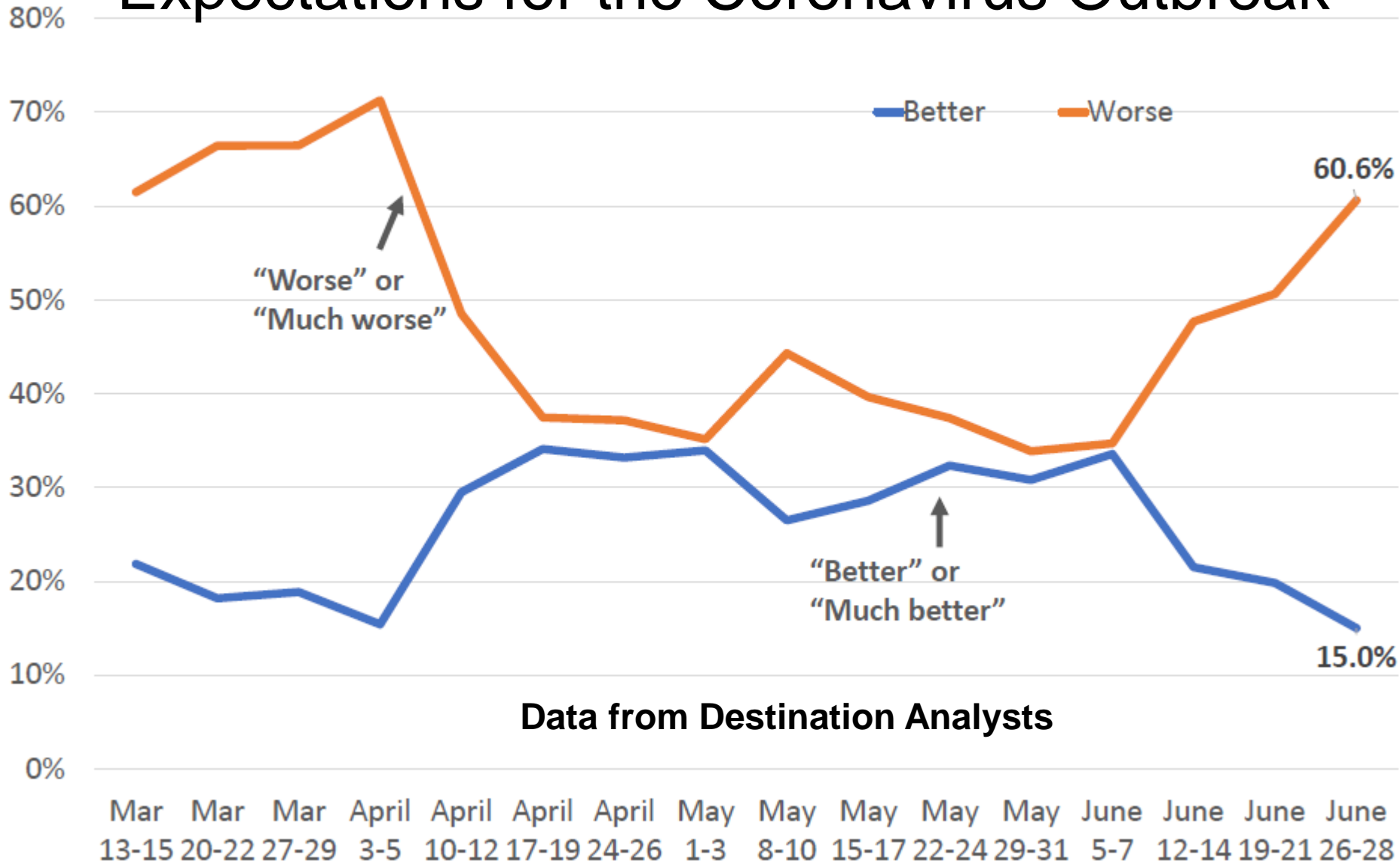
Ratio of concerned (10-6) to unconcerned (0-4) on an 11-point scale



Data from Destination Analysts

Question: Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus? (Please answer using the scale below)

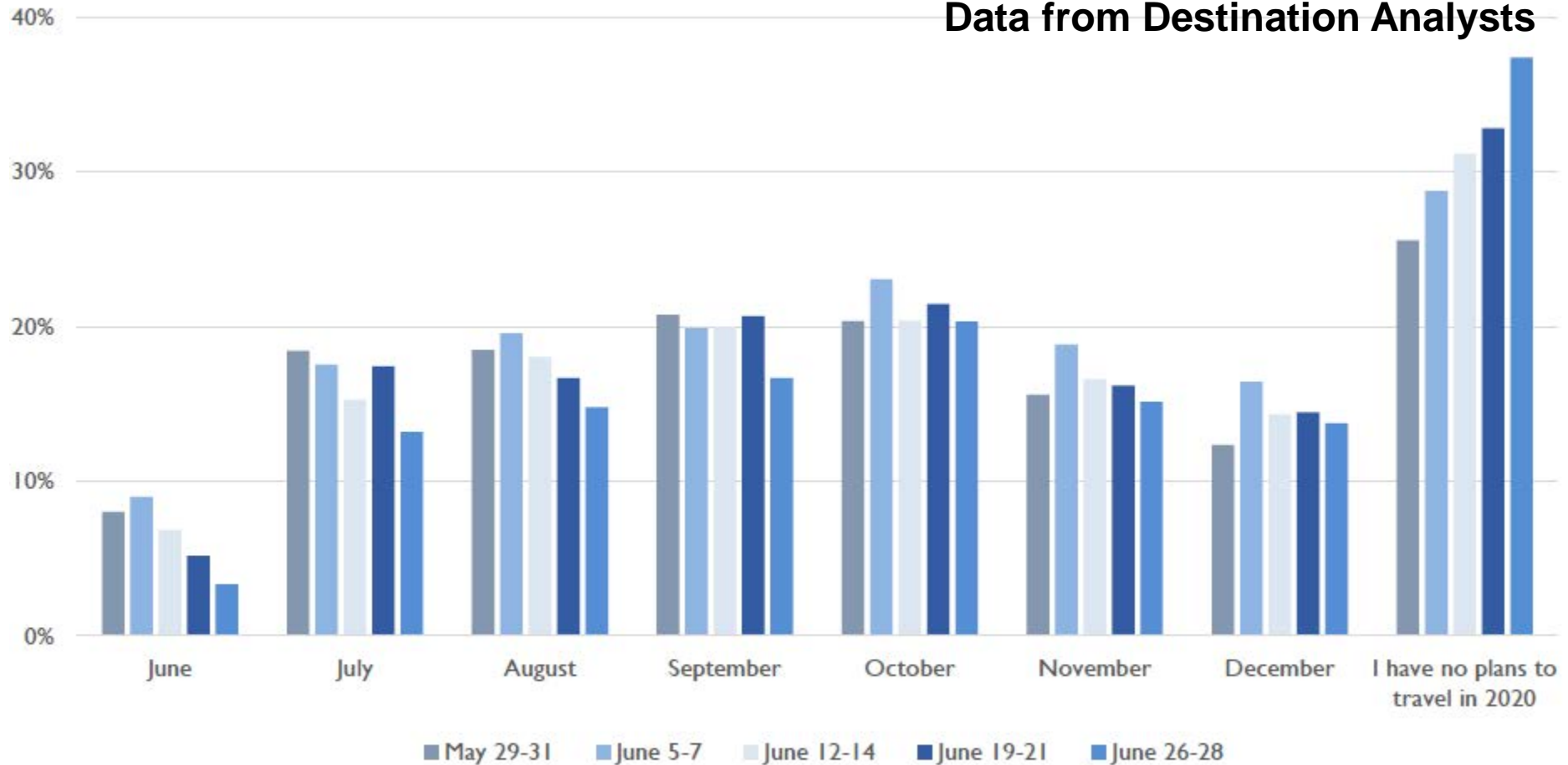
Expectations for the Coronavirus Outbreak



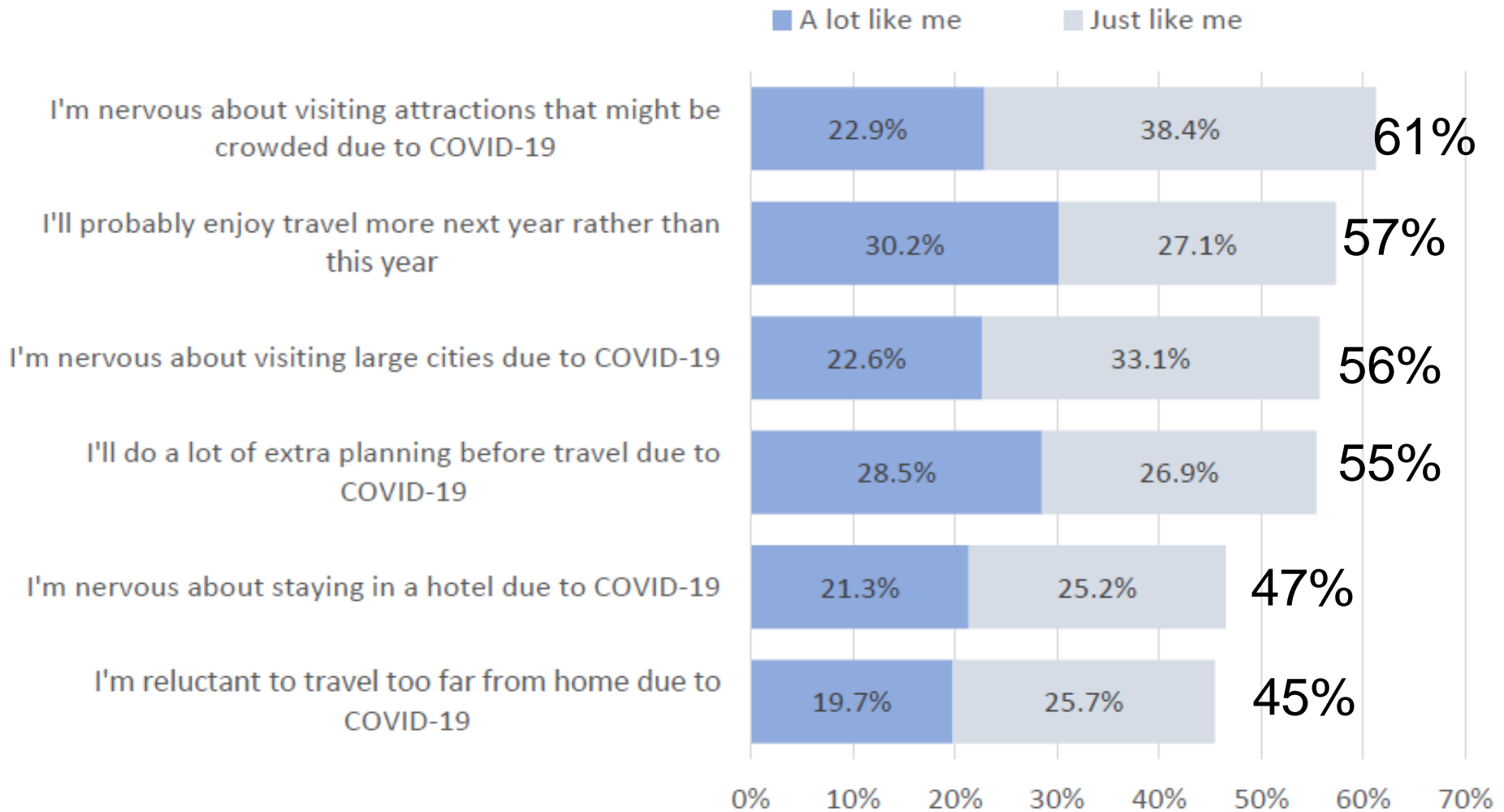
Data from Destination Analysts

Months of upcoming travel plans

Data from Destination Analysts

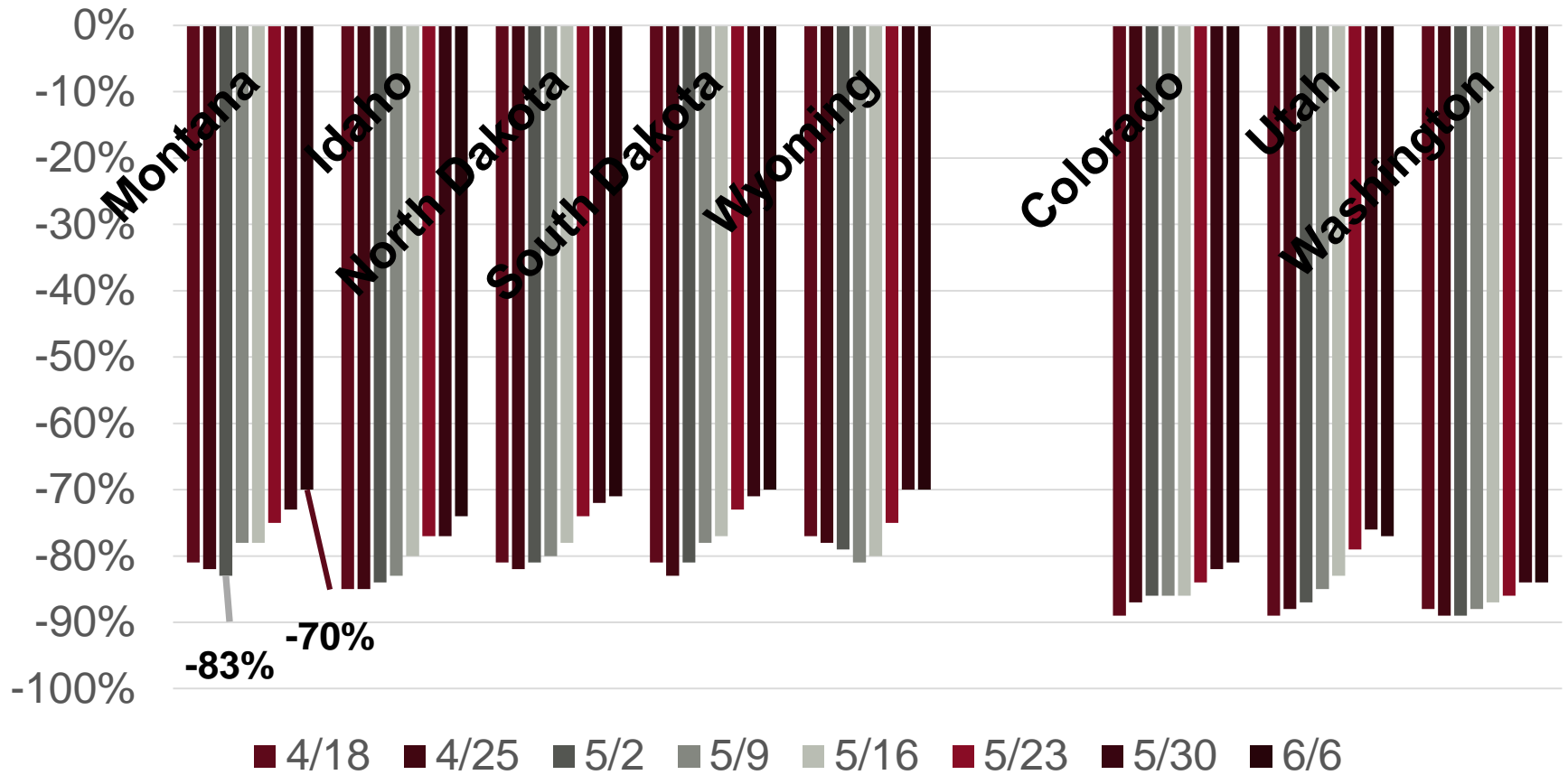


Question: Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips?



Question: Please use the scale below to tell us about yourself. Check the one box that best indicates how descriptive the statement is of you and your FEELINGS ABOUT LEISURE TRAVEL IN THE NEXT 12 MONTHS.

YOY % Change in Weekly Travel Spending



Three quarters of travelers are supportive of existing or potential 14-day quarantine policies for travelers from states with high incidences of coronavirus.

There is even three times as much support for mask enforcement policies as opposition.



Nearly 30 percent of travelers say they will avoid destinations they would normally consider visiting for the remainder of the year, and over 60% of these travelers say it will be in the second half of next year or later before they will consider these destinations again.

40% are now saying they will put off their next trip by air for at least a year from now, and 45.4% feel nervous going too far from home for a trip.

Nearly 60% report feeling like they will simply enjoy travel more next year rather than this year.

Bed Tax Collection Woes

- VFR is most popular
- ADR has been reduced
- Nervousness about cleanliness of rooms
- Fewer flights into MT – current flights still being cancelled
- Canadian border not open
- East side of Glacier not open

Norma's projections

- Nonresident visitation down nearly 75% for Q3 2020
- 50% reduction in bed tax collections for FY21
- Montanan's will utilize our outdoor areas more than ever
- FY22 is harder to predict than ever and will change by the week

Thank you!

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