



# Mountain Traveler Sentiment Survey (MTSS) Results

August 2020

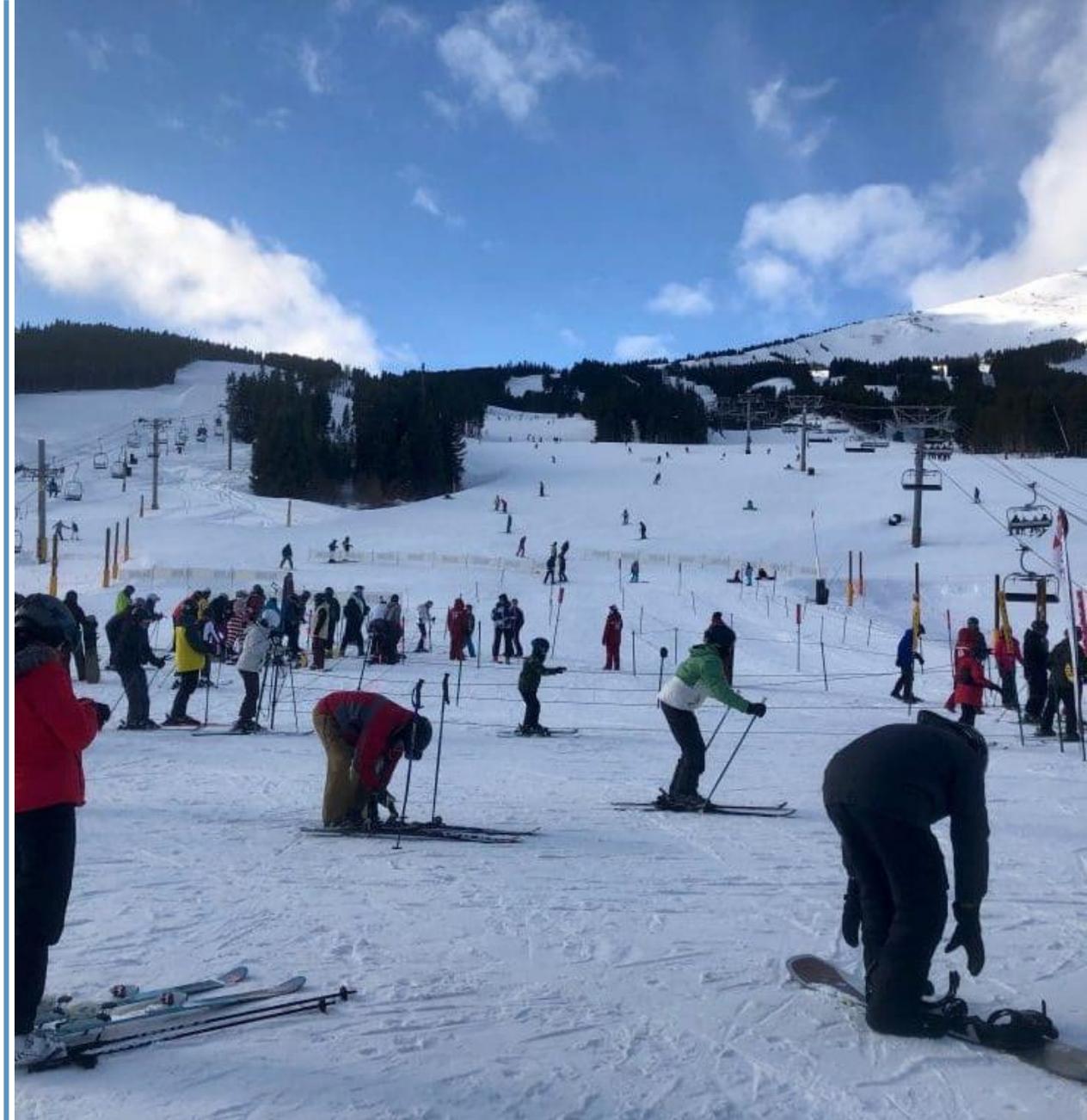
INSIGHTS COLLECTIVE  
Pandemic Economics Think Tank



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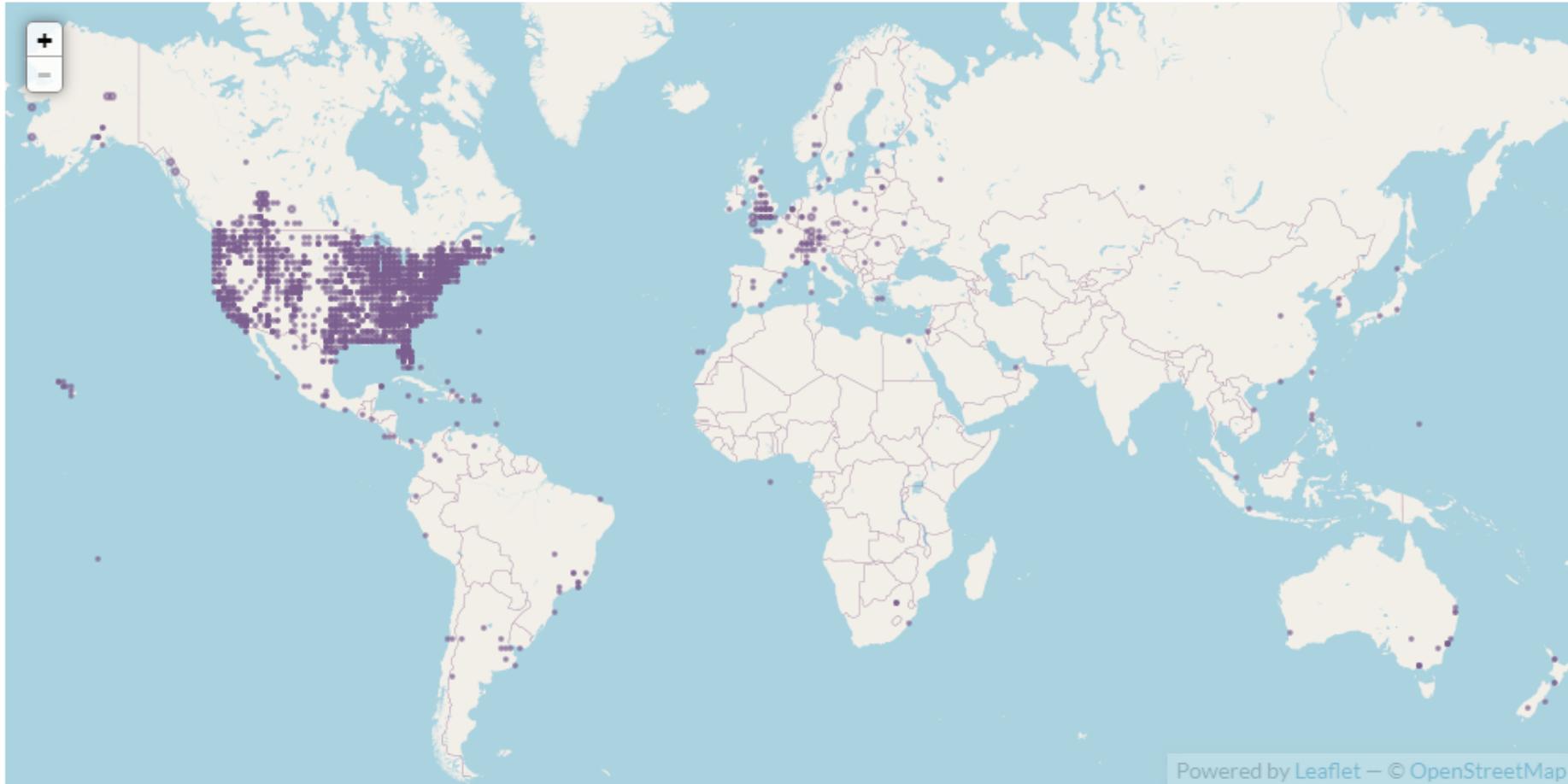
# Mountain Traveler Sentiment Survey (MTSS)

- MTSS is a customer intelligence research project intended to document visitation patterns and future plans of mountain travelers, including both summer and winter visitors. RRC Associates created and launched the survey initiative in June 2020 as a pro bono project to benefit decision makers at ski resorts, DMO's, local governments and other entities. It is intended that the information can be used for greater clarity and better outcomes during the uncertainty of the coronavirus.
- If you have questions about the results, please contact Dave Belin at RRC Associates: [davidb@rrcassociates.com](mailto:davidb@rrcassociates.com)
- Survey responses continue to be collected, 36,000+ surveys to date
- Updates to the survey data set will be presented periodically.



# Geographic Origin of Respondents

Responses have been received from throughout the U.S., as well as Canada, Europe and South America.

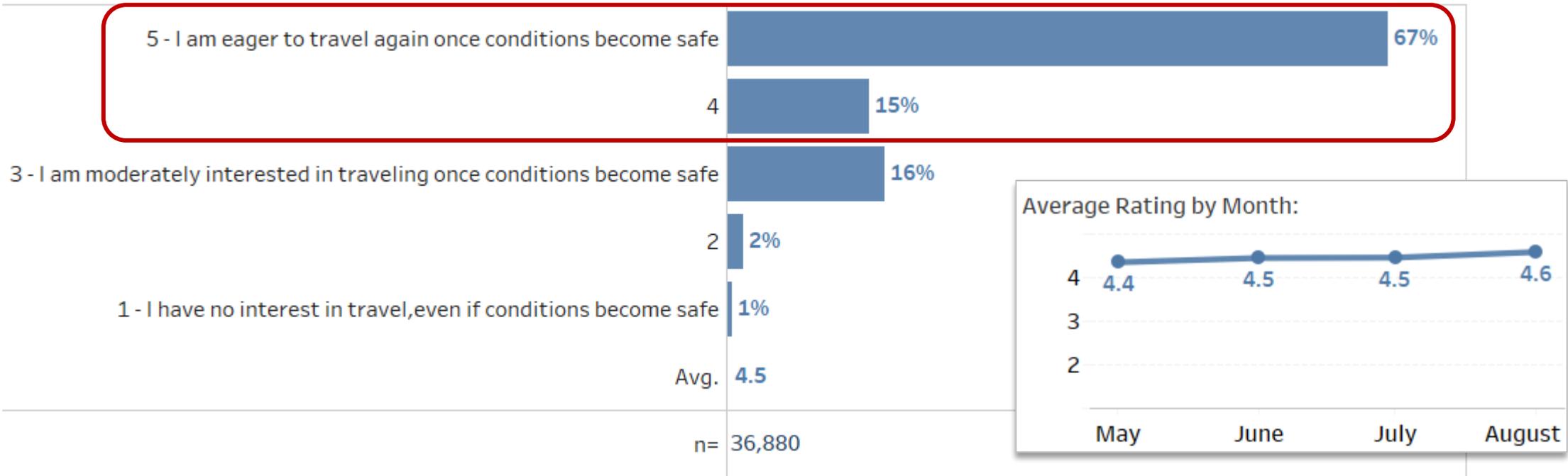


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# Desire to Travel

67% are “eager” and 97% express some interest in travel once conditions are safe. Interest has shown a moderate increase since May.

How would you rate your desire to travel once conditions become safe?

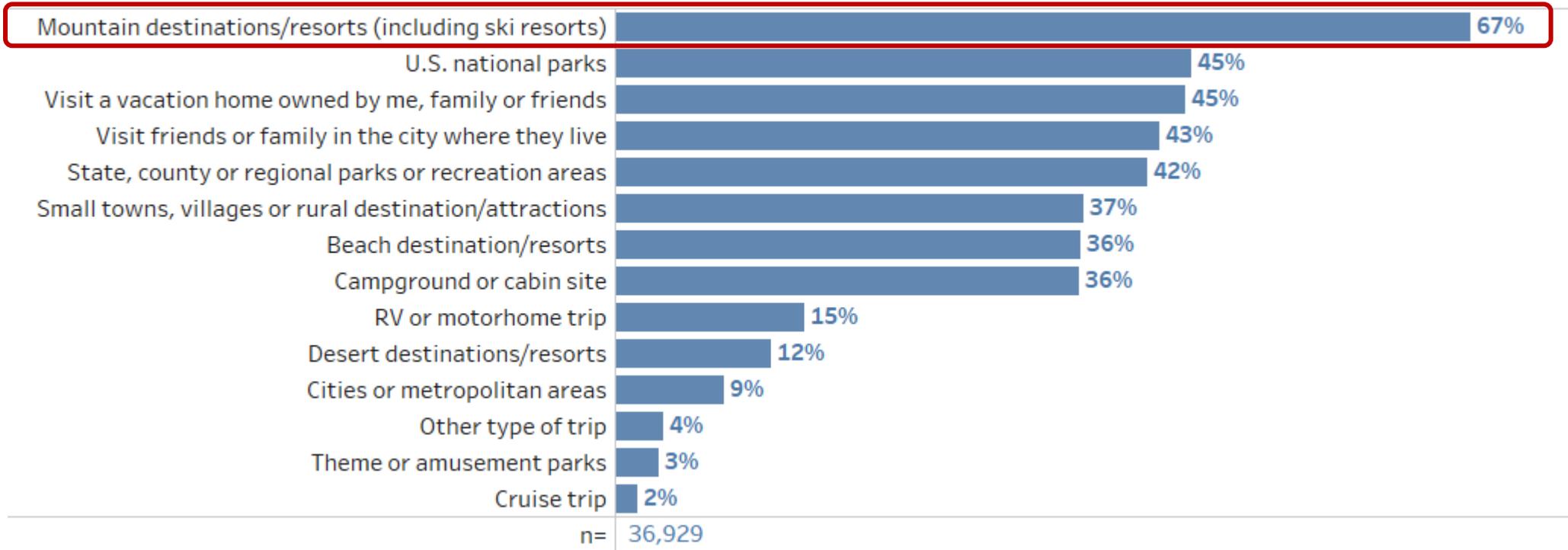


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# First Overnight Leisure Trip

Mountain resorts are dominant future destination for MTSS participants. Cruises, theme parks and urban areas are not high on the list.

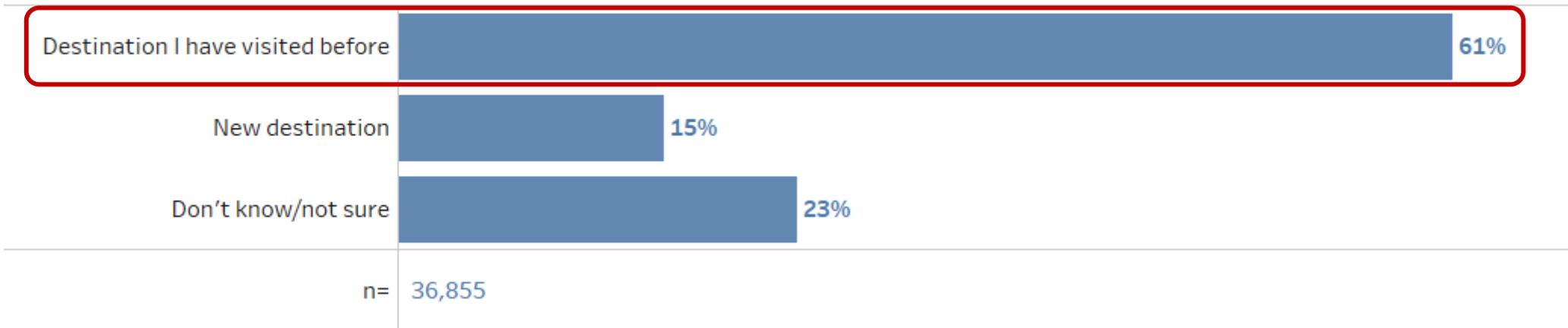
Once you feel it is safe again to travel, which best describes the place(s) you will likely visit on your FIRST OVERNIGHT LEISURE TRIP since the virus hit? (Check all that apply)



# New destination or familiar destination?

People want to go where they're comfortable. Just 15% intend to try a new destination on their first trip since the pandemic began.

Thinking about that first leisure trip you might take, would you expect to visit a destination you have visited before, or a new destination?



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# Concerns About Starting to Travel

Air travel, potential COVID-19 hot spots and social distancing are key concerns for mountain travelers. Personal financial situation is a factor, but for only about 1 in 10.

What would be your biggest concerns about starting to travel again? (Check all that apply)

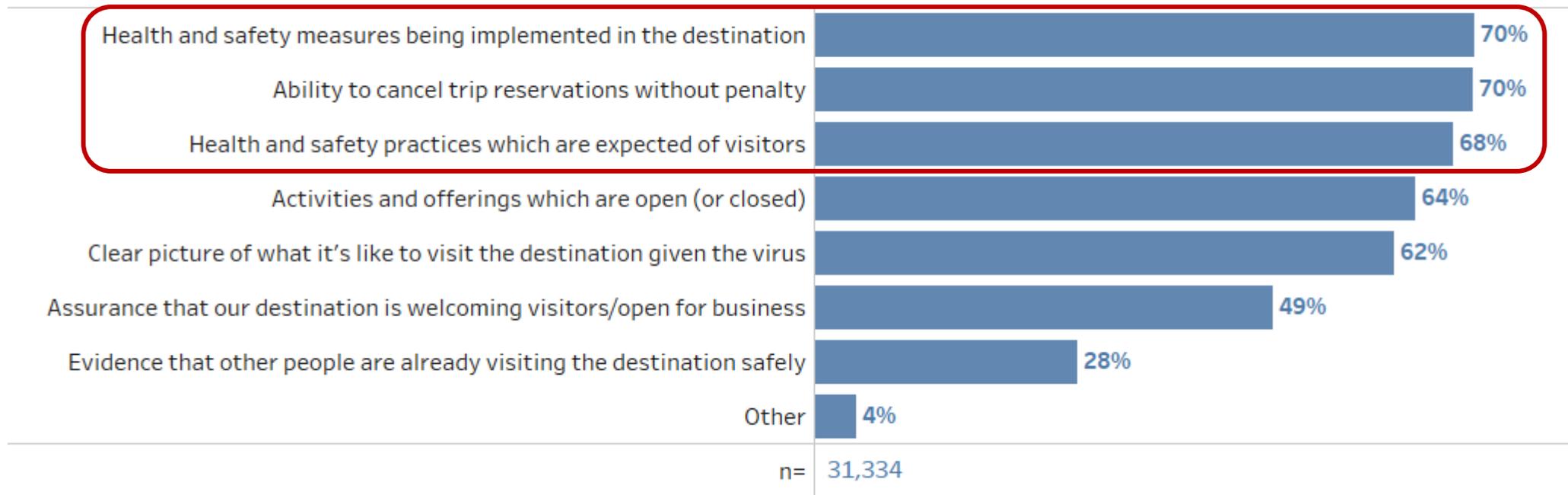


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# Information to Increase Likelihood of Visiting

Travelers want to know what's being done and what's expected of them to keep visitors safe. An ability to cancel reservations is also important. This information will be key to messaging.

Once you consider travel to be safe again, what information would you need to help make you more likely to visit [Your Resort]? (Check all that apply)

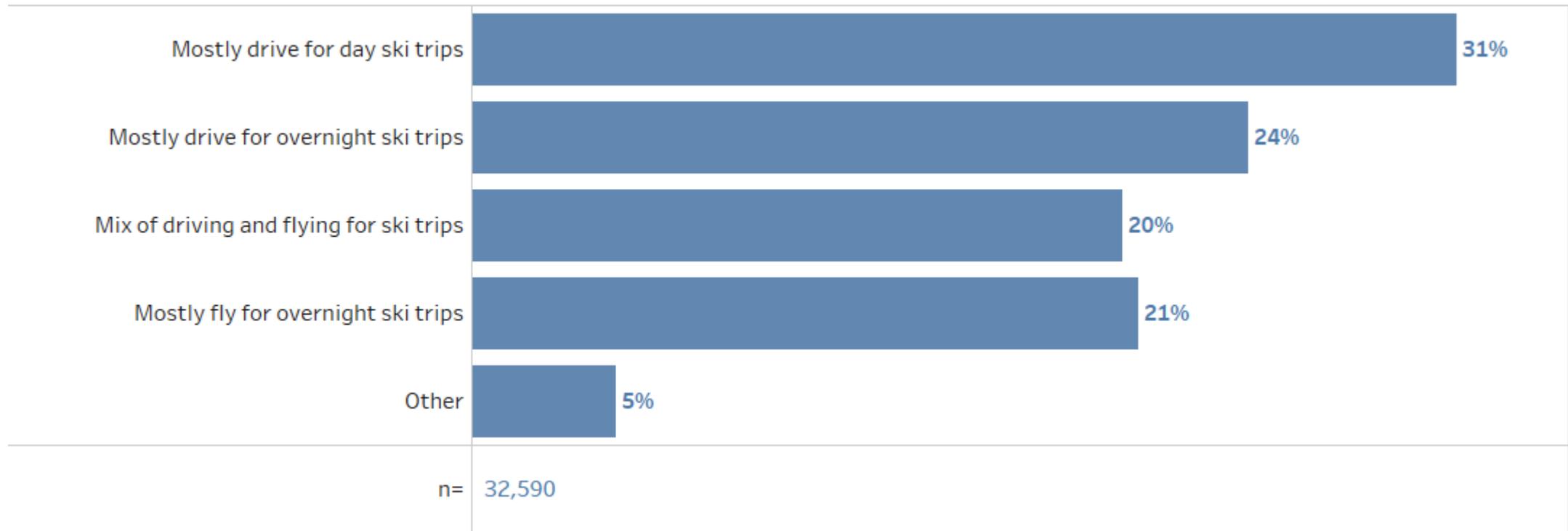


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# Typical Travel Pattern for Ski Trips

Survey results captured a mix of travel patterns, including drive for day ski trips, drive for overnight ski trips, and fly for overnight ski trips. With concern about flying being so high, it's likely that some will change their typical pattern this winter.

What is your typical travel pattern for skiing or snowboarding trips?

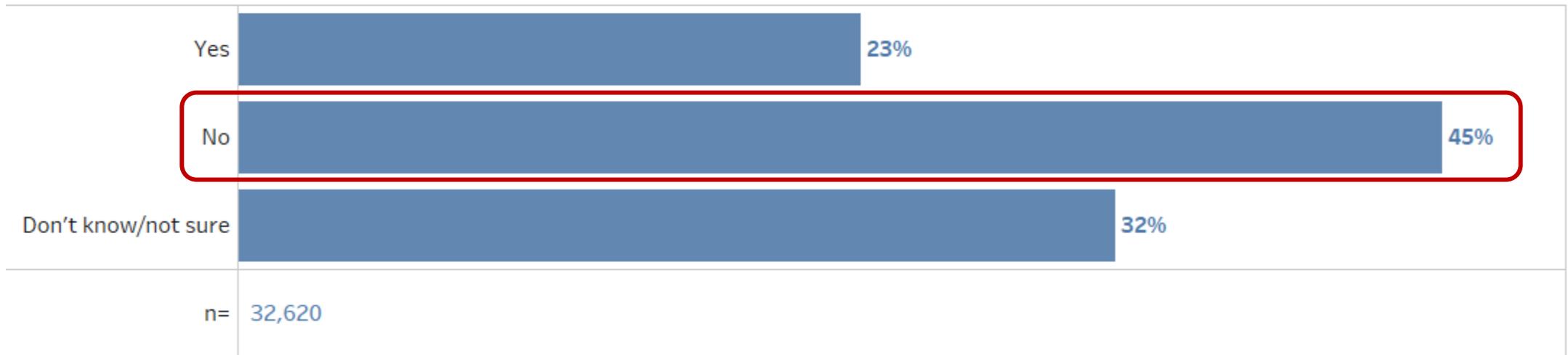


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# Changes to Typical Travel Patterns

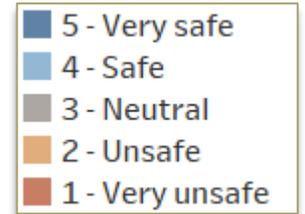
- About half of mountain travelers expect no change in their ski travel during the upcoming season, while one-third are uncertain.

Do you anticipate your skiing/snowboarding travel patterns changing next winter compared to your usual travel pattern?



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# Perceptions of Safety for Travel Activities



At this moment, how safe would you feel doing each type of travel activity?  
Average Rating and Percent Responding 1 - 5.

Outdoor options top the list of perceived safe activities for travelers. Lodging, indoor dining, business travel, and meetings/conferences will be a challenge now and as we look toward winter.

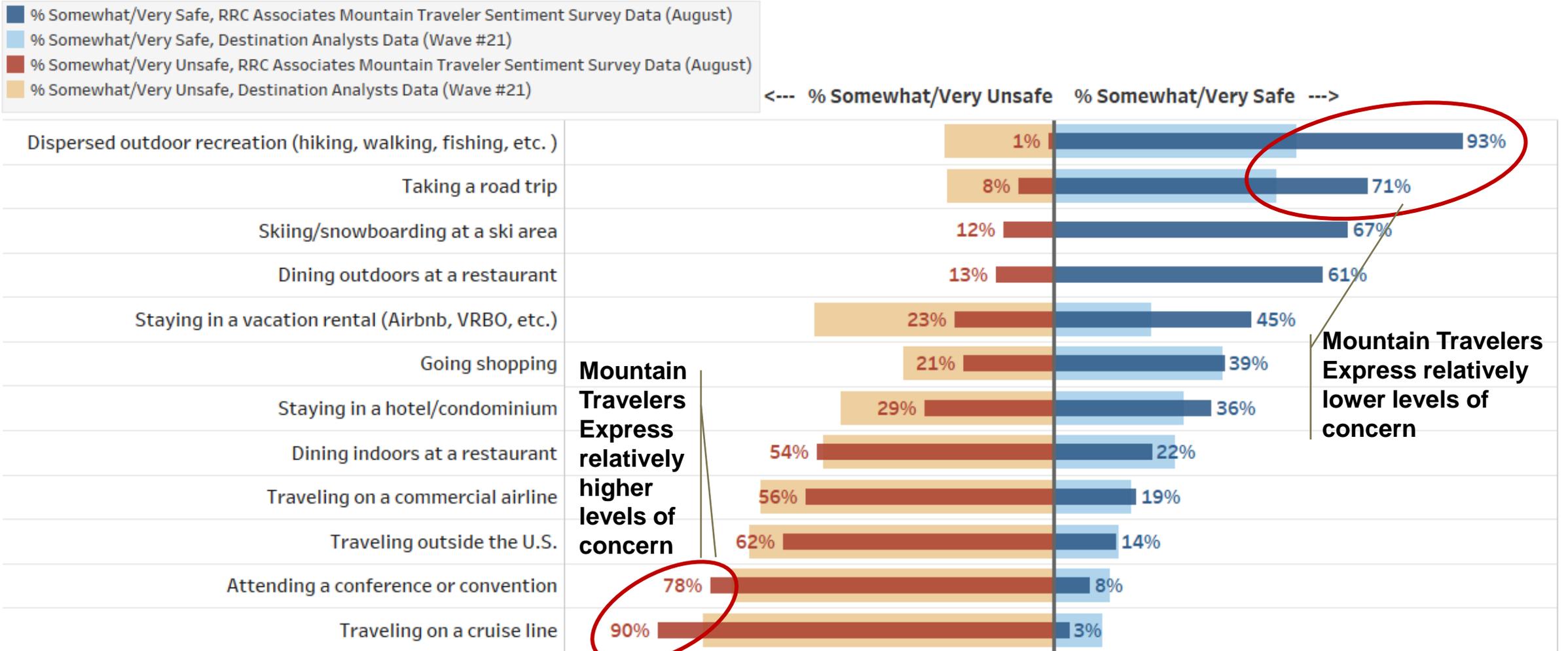
Rating Category	Avg.	n=	Unsafe/Very unsafe (1 & 2)	Neutral (3)	Safe/ Very Safe (4 & 5)
Dispersed outdoor recreation (hiking, walking, fishing, etc.)	4.4	37,573	1%	6%	93%
Taking a road trip	3.9	37,595	8%	21%	71%
Skiing/snowboarding at a ski area	3.8	37,596	12%	22%	67%
Dining outdoors at a restaurant	3.7	37,636	13%	26%	61%
Visiting friends and relatives	3.5	37,603	16%	33%	51%
Staying in a vacation rental (Airbnb, VRBO, etc.)	3.3	37,563	23%	33%	45%
Going shopping	3.2	37,590	21%	41%	39%
Staying in a hotel	3.1	37,618	29%	35%	36%
Traveling for business reasons	2.6	37,397	48%	33%	19%
Dining indoors at a restaurant	2.5	37,615	54%	24%	22%
Traveling on a commercial airline	2.4	37,625	56%	25%	19%
Outdoor festivals or concerts	2.4	37,595	61%	21%	19%
Traveling outside the U S	2.3	37,552	62%	24%	14%
Attending a conference/convention	1.9	37,565	78%	14%	8%
Indoor concert, performance, or movie	1.8	37,611	81%	12%	8%
Traveling on a cruise line	1.4	37,596	90%	7%	3%

\*Categories are sorted in descending order by the average rating.

# Comparison to Destination Analysts Data

Mountain travelers are compared to a national sample. In general, ratings of safety are similar but there are also differences.

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



Mountain Travelers Express relatively higher levels of concern

Mountain Travelers Express relatively lower levels of concern

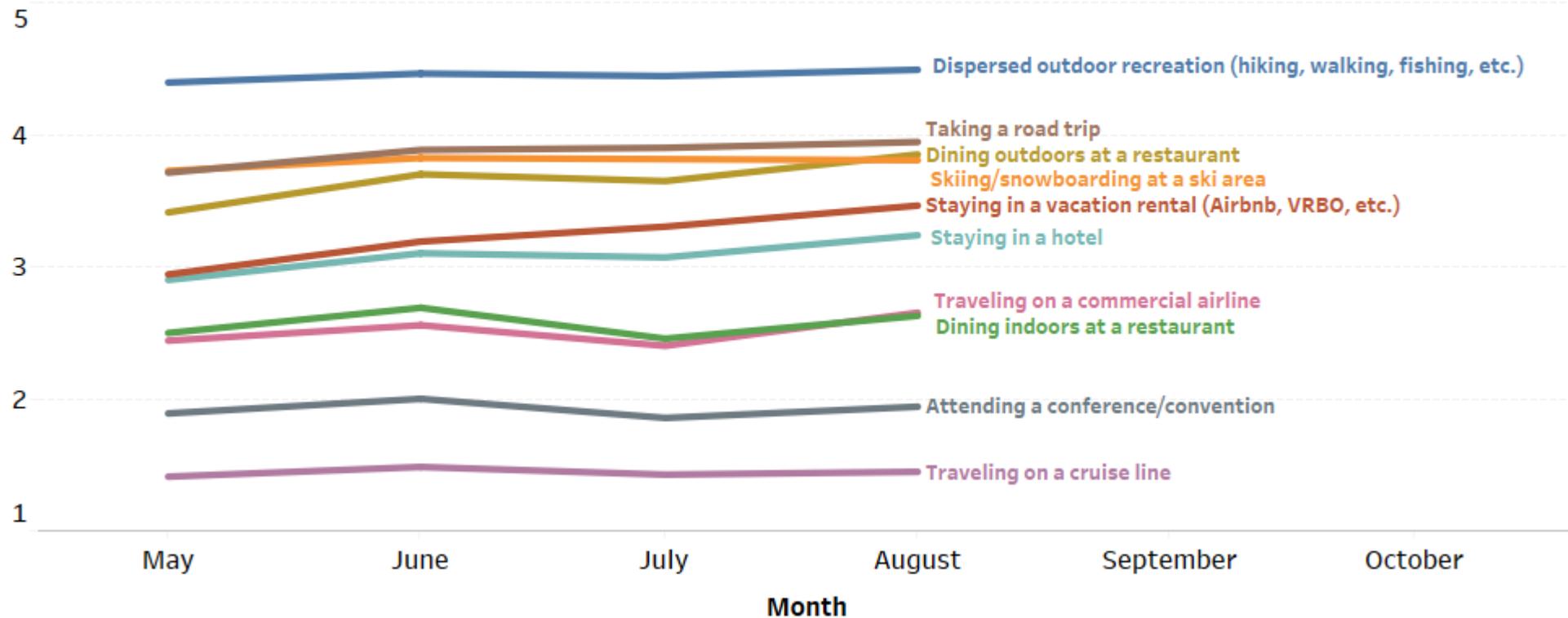
# Perception of Safety Over Time

Results are relatively stable over time, though dipped slightly in July

## Mountain Traveler Sentiment Survey

Q 3: At this moment, how safe would you feel doing each type of travel activity?

Average Rating 1 - Very Unsafe to 5 - Very Safe



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# Perception of Safety Over Time

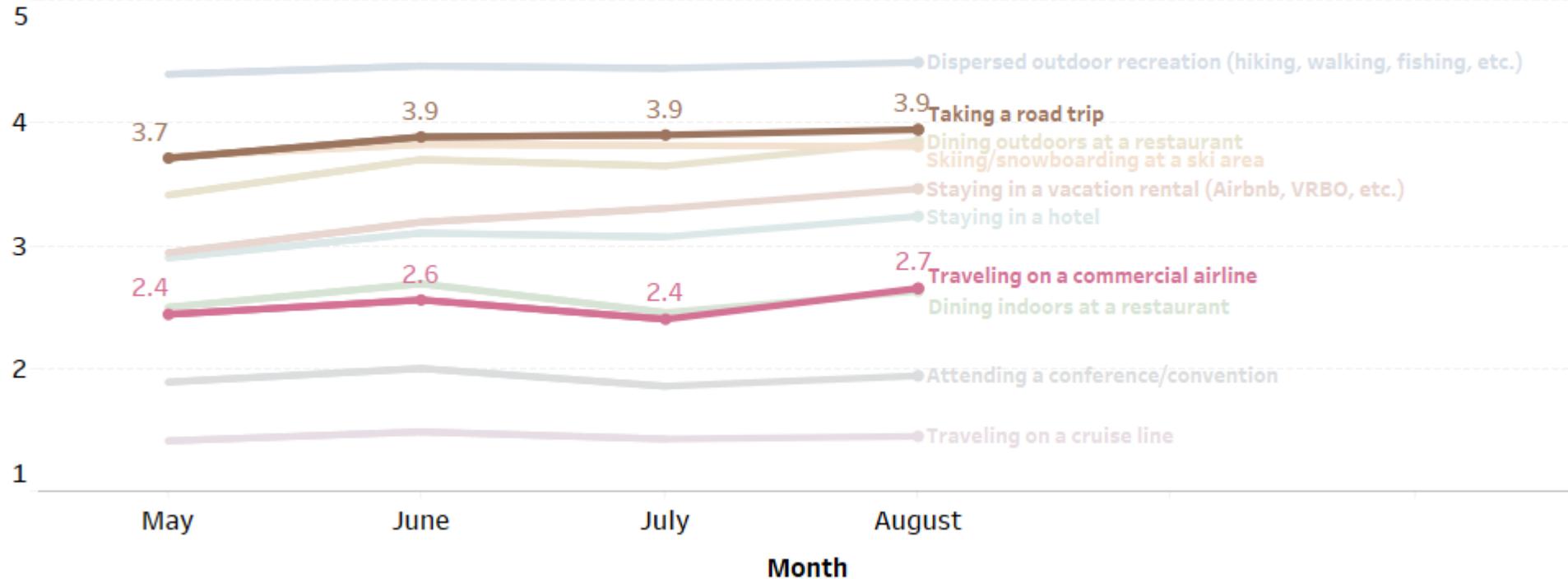
Taking a road trip, Traveling on a commercial airline

Perception of air travel becoming safer, a positive sign

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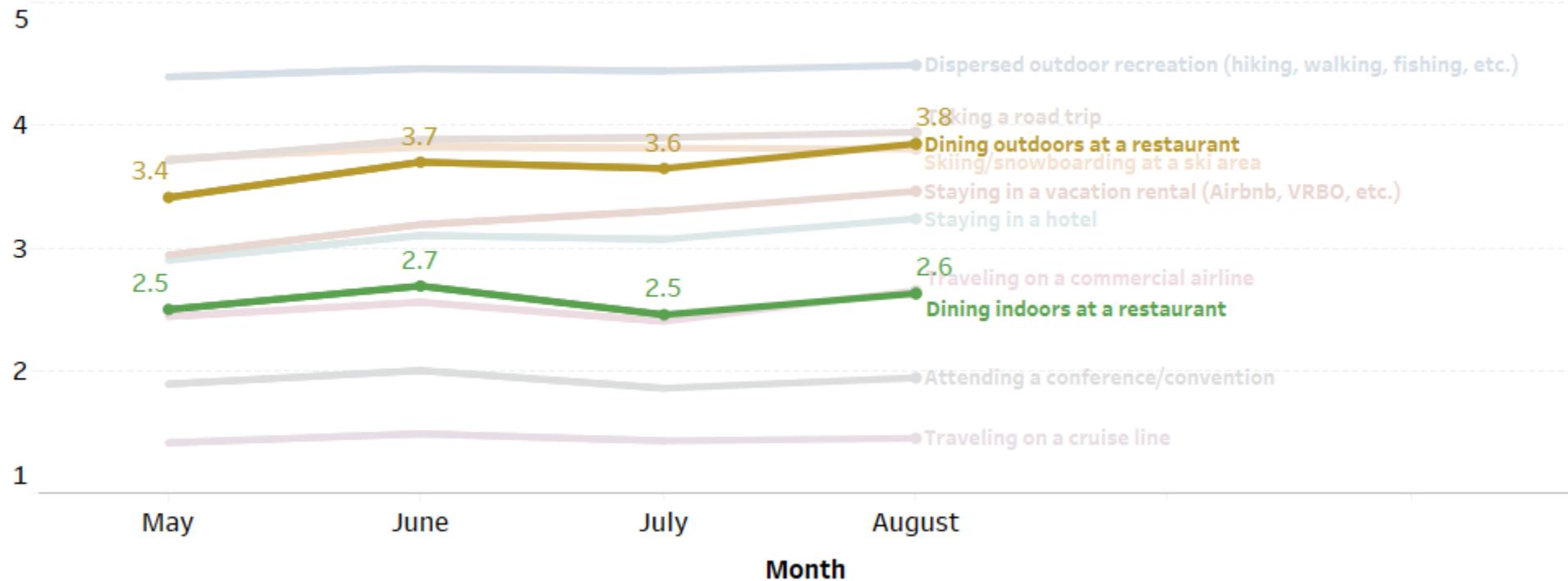
# Perception of Safety Over Time

## Dining Indoors & Dining Outdoors

### Mountain Traveler Sentiment Survey

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# Perception of Safety Over Time

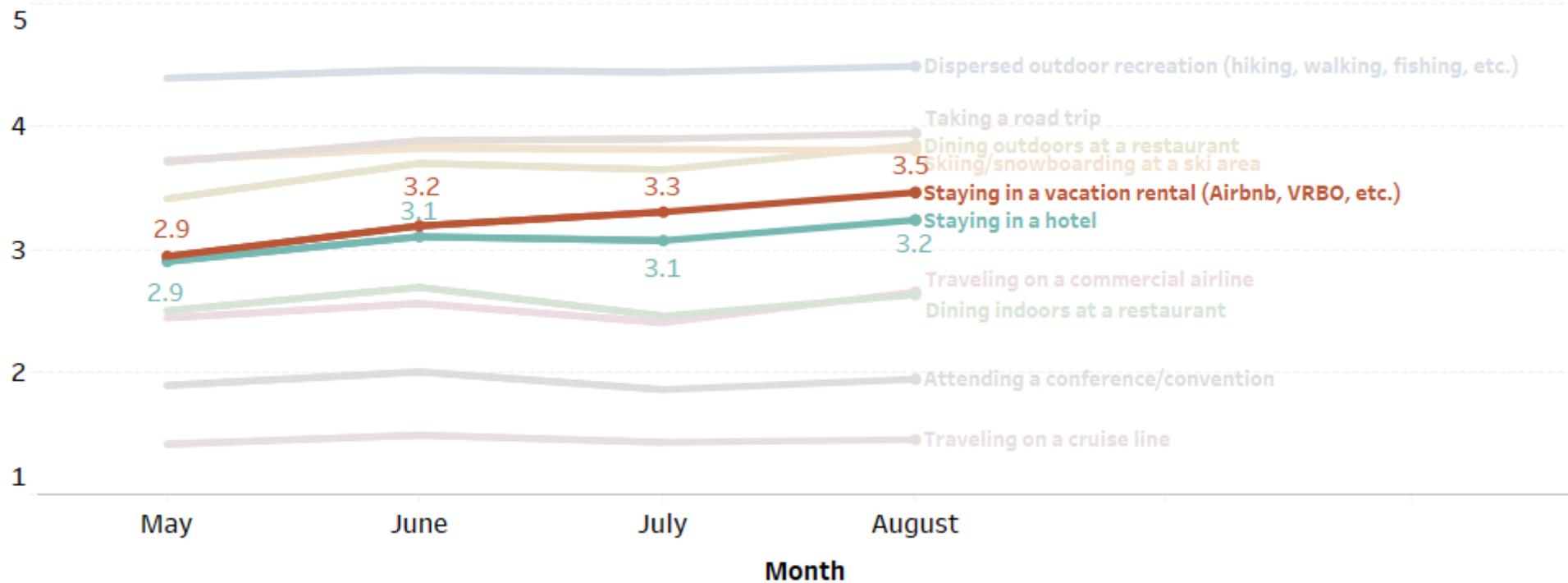
Hotel, Vacation Rental (Airbnb, VRBO, etc.)

Safety of Airbnb starting to outpace safety of hotels in past two months

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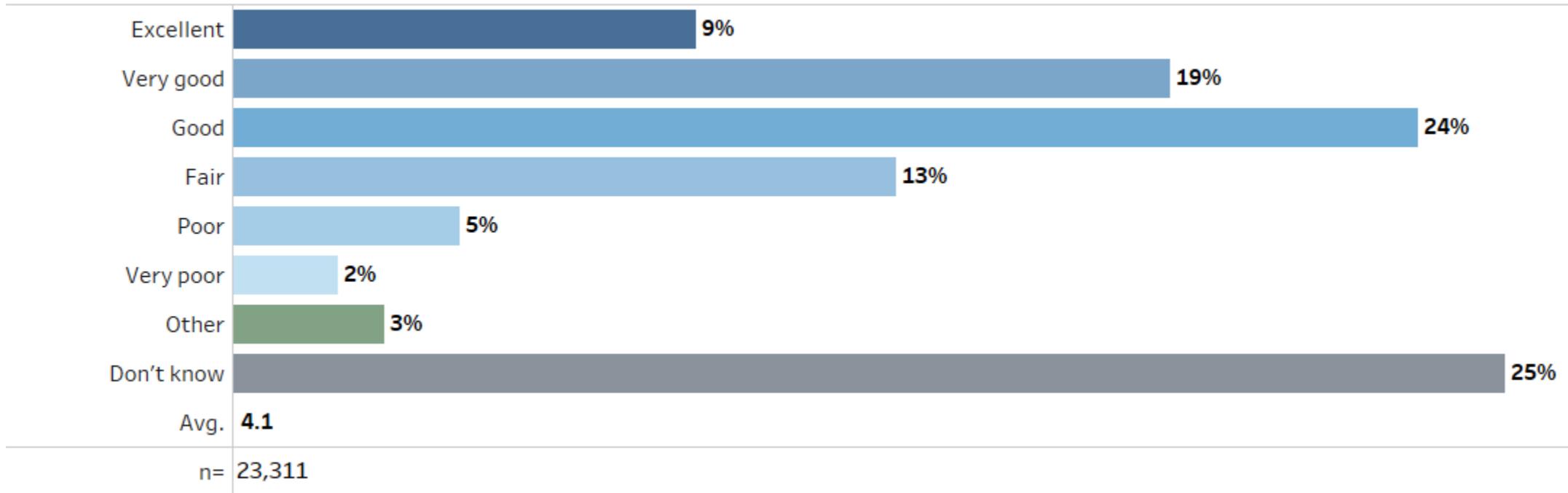


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# Response of Ski Areas to Pandemic

- 54% of travelers rate ski resort response good to excellent
- 20% rate the response fair to poor

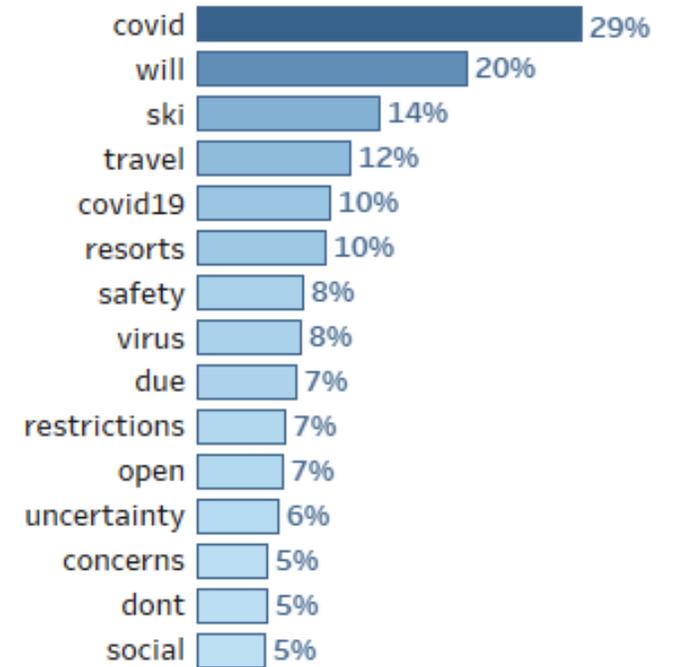
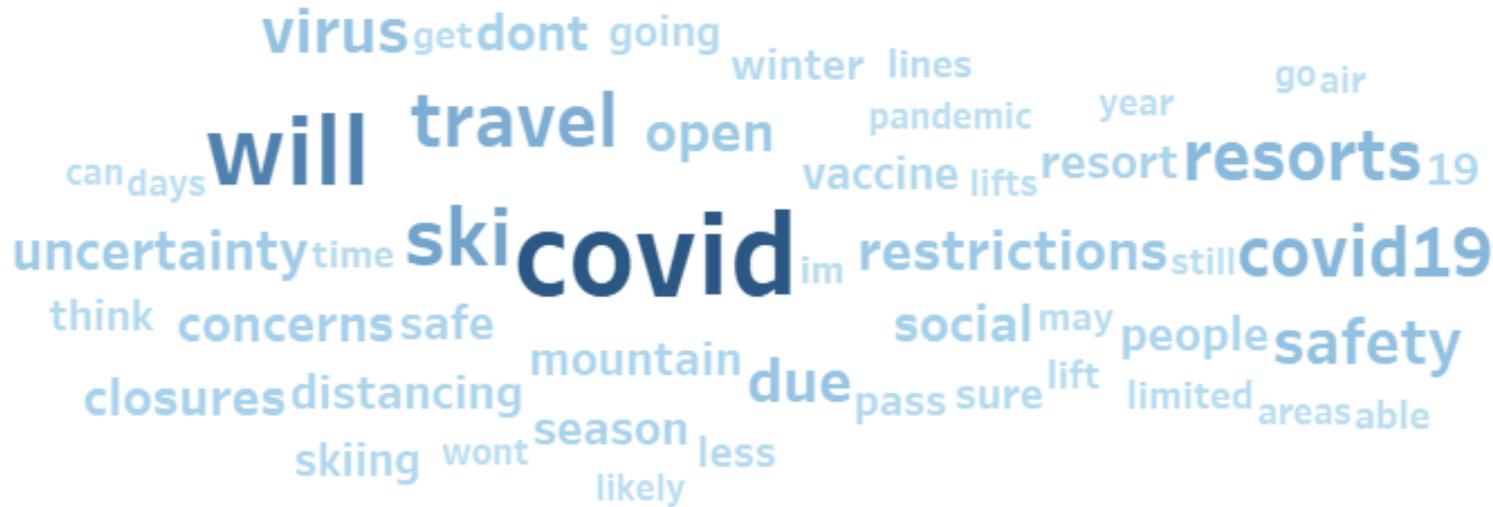
Overall, how would you rate the response of ski areas to the coronavirus pandemic?



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# Mountain Traveler Sentiment Survey

Q21: What are the primary reasons you anticipate skiing/snowboarding less next winter



5,963 comments :

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# Additional Detailed Information Available from MTSS

- The MTSS has much more detailed results, which are available for purchase
  - Intentions to ski/snowboard in 2020/21
  - Timing of travel for next 12 months
  - Second homeowner patterns
  - How travel patterns might change – fly versus drive
  - Purchase or intent to purchase a season pass
  - Assurances for feeling safe, buying a pass
  - Demographics of respondents
  - Qualitative comments describing thoughts and concerns
  - Ability to segment results by geographic residence, demographics, second homeowners, and other variables

# Conclusions

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- People are still reluctant to travel but mountain destinations have the “outdoor” advantage for safety and comfort
- Air travel is still a major concern. Drive markets will be key to travel choices in near term.
- People want to visit familiar destinations. 2020 is NOT the year for new adventures as expressed by many respondents.
- People want to know what is being done to keep them safe. Safety protocols are key to effective messaging for visitors and residents.



# Conclusions

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- Comfort with outdoor dining is high but indoor restaurants are still problematic. Challenges ahead for the fall and winter.
- Staying in a vacation rental is seen as safer than staying in a hotel.
- Overall feeling of safety toward outdoor activities is high but indoor gatherings are still a red flag.
- Outdoor/mountain resorts have an advantage over urban areas at present based on traveler sentiments survey results.





# Six Feet Away COVID-19 AND MINIMIZING RISK



COVID-19 is primarily spread through respiratory droplets produced when an infected person coughs or sneezes.

People who have sustained contact within 6 feet of an infected individual are most at risk of transmission.



# Thank You

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