



# COVID-19 Impact on the Leisure and Travel-Related Industry

*Week One—Five Results*

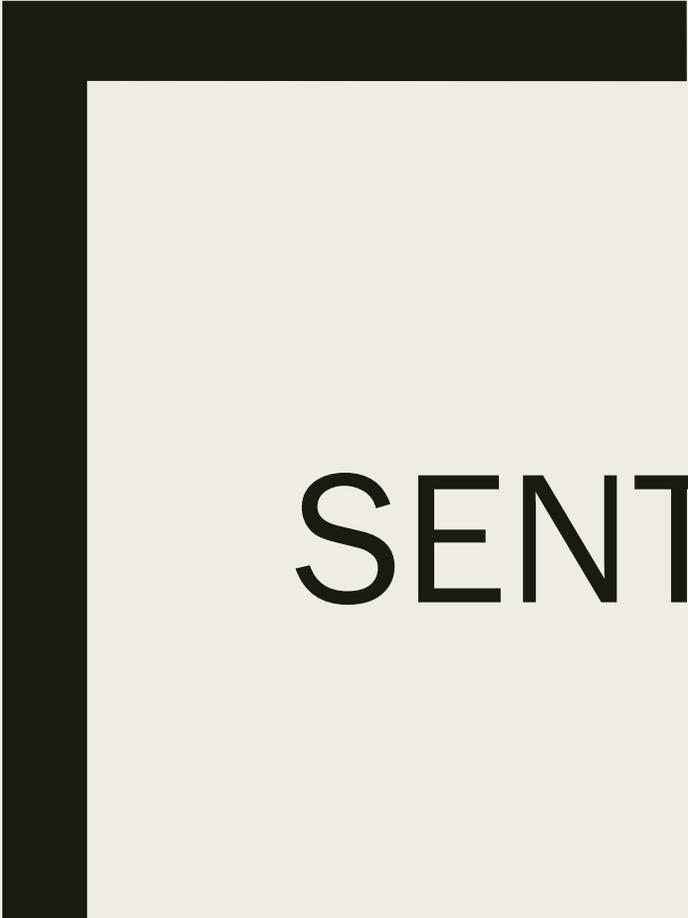
Indiana Destination Development Corporation

# IDDC / Rockport Analytics Partnership

- The Indiana Destination Development Corporation partnered with Rockport Analytics to develop three critical analytical assets to help the IDDC measure the scope, timing and impact of COVID-19 on the state
- These tools and measures will help citizens, businesses and critical policy makers answer several crucial questions such as:
  - What is the current impact on the state's economy as a whole and those front-line sectors related to leisure and travel?
  - How many jobs have been displaced in each sector, how much income has been lost, how many businesses have shuttered and how strongly will they come back?
  - What does the COVID-19 recovery look like? Can we project the recovery under several realistic scenarios in order to develop a range of planning outcomes?

# Data Collection

- Rockport will release 2 sets of surveys:
  - *Business Sentiment Survey*
  - *Consumer Sentiment Survey*
- Each week for five weeks, Rockport will send out the business and consumer surveys to the respective people asking the same questions week to week
- This methodology will help capture the specific changes and trends that both business and consumers are encountering
- This study will create an Indiana-specific barometer of epidemiological, economic, leisure and travel-related, business and labor stress, and public policy measures weighted to reflect evolving conditions and their correlation with LT-R sector performance



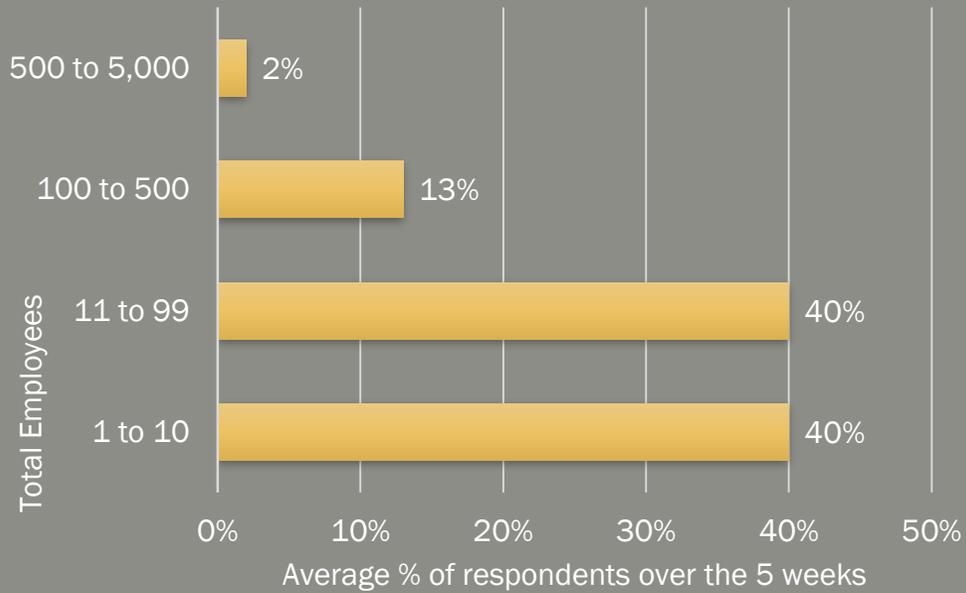
# BUSINESS SENTIMENT SURVEY

*Week One—Five Results*

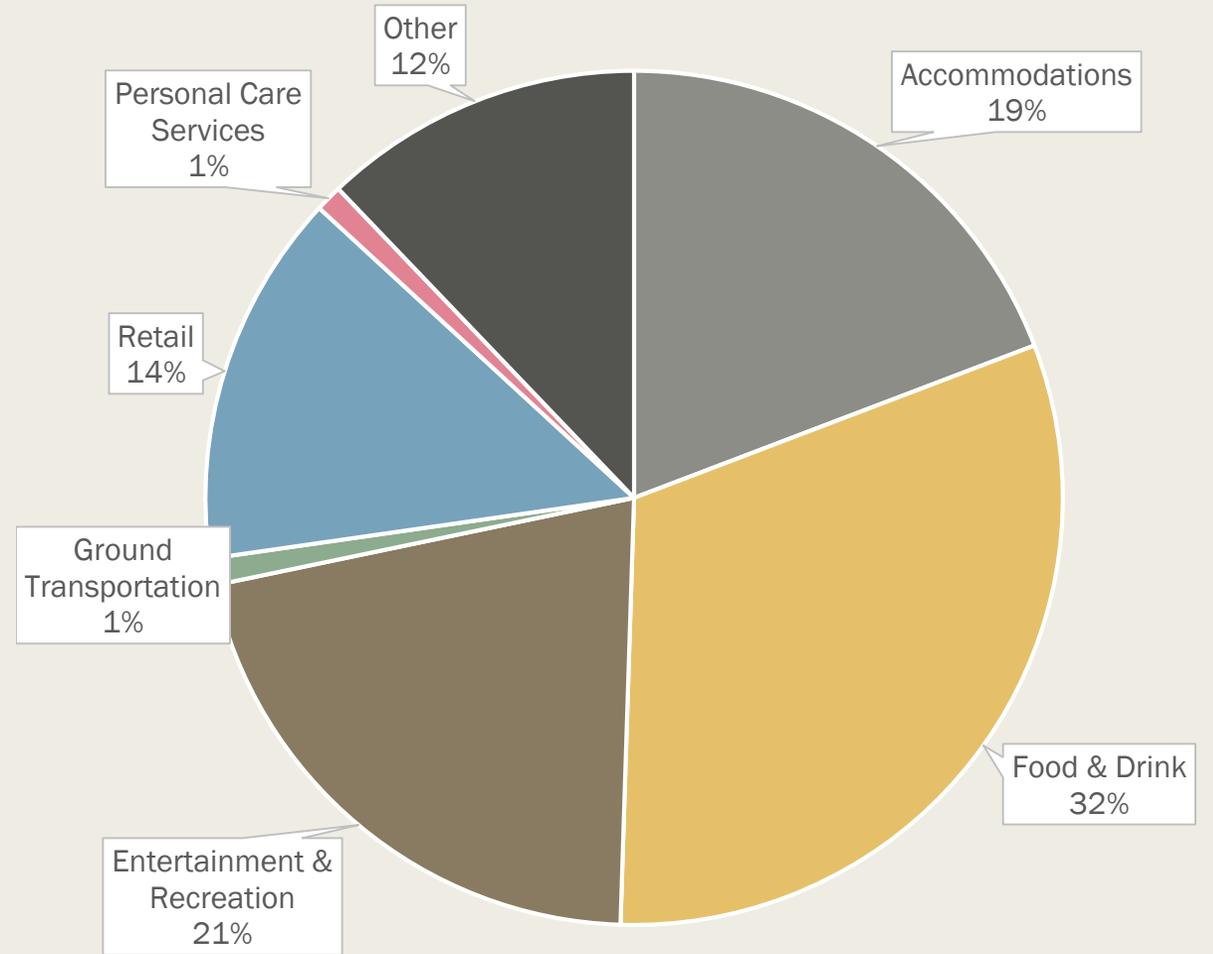


# Respondent Demographics

## Company Size

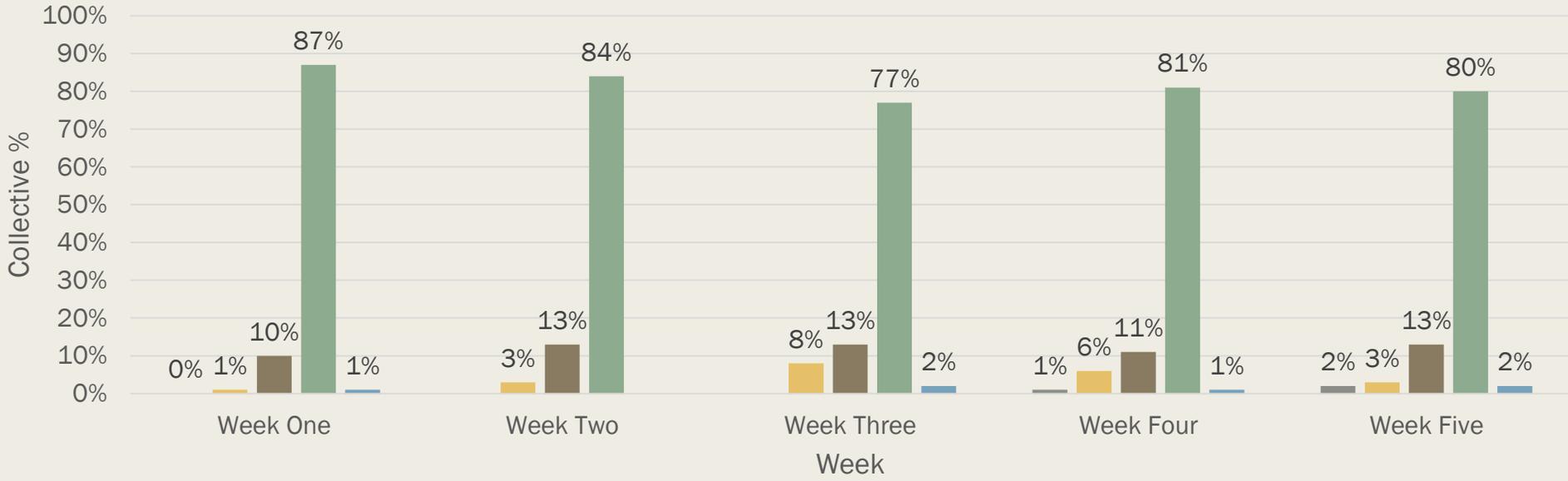


## Industry



# Financial Impact

## What impact has Covid-19 had on your company's normal operations and performance?



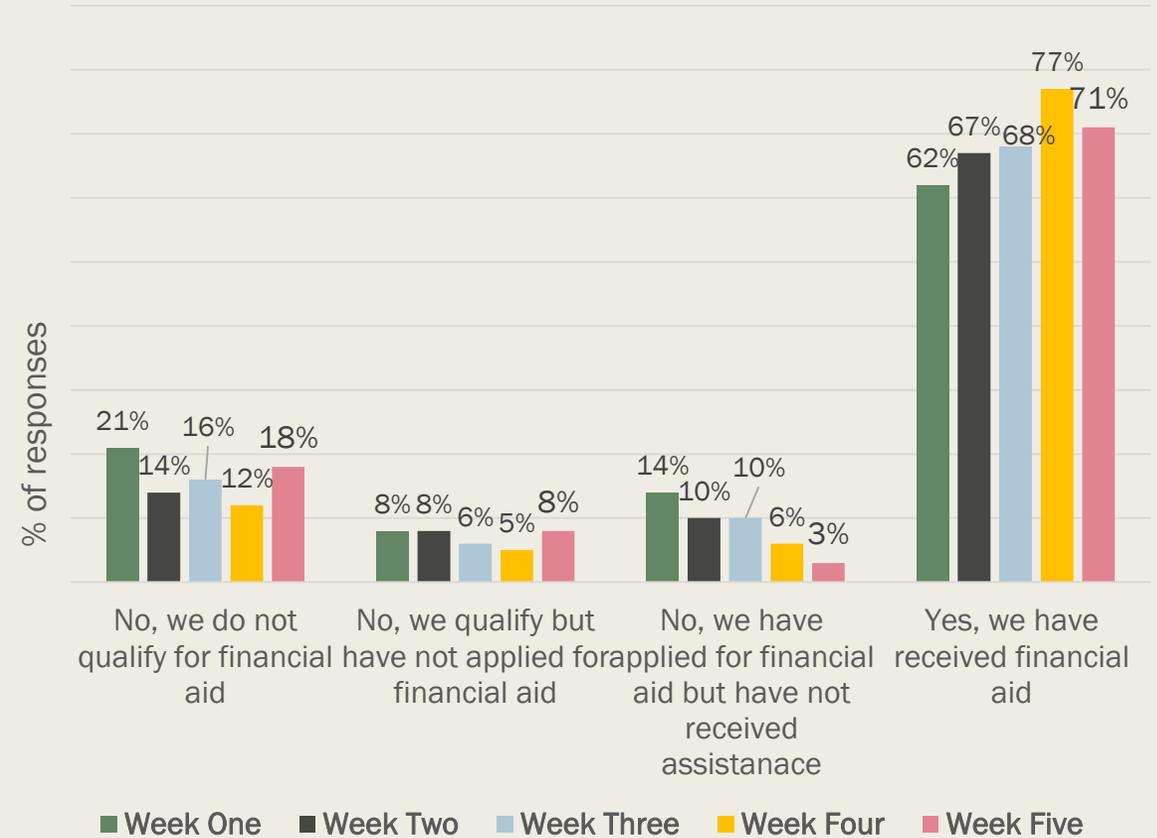
- No impact, operations and financial performance is expected to be at expectations
- Low impact - operations, workforce, and revenue are expected to be slightly below expectations
- Moderate impact -operations and financial performance expected to fall moderately below expectations
- High impact, operations and financial performance is expected to fall significantly below expectations
- COVID-19 will actually boost our operations and financial performance

# Financial Impact

## Total amount of revenue loss

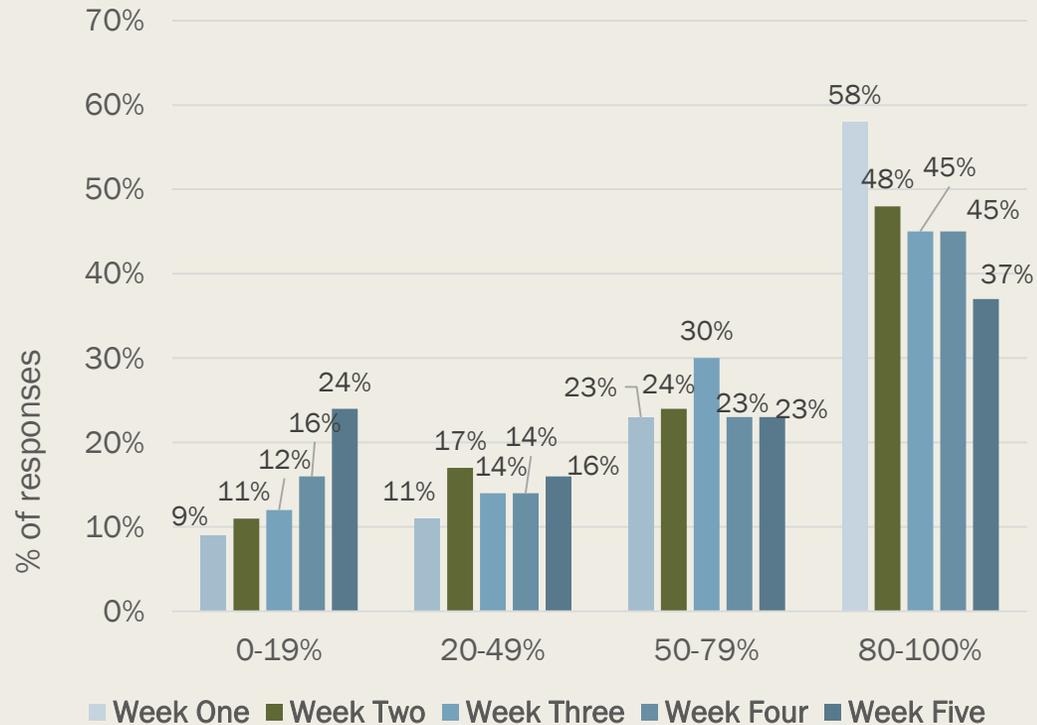


## Financial aid assistance

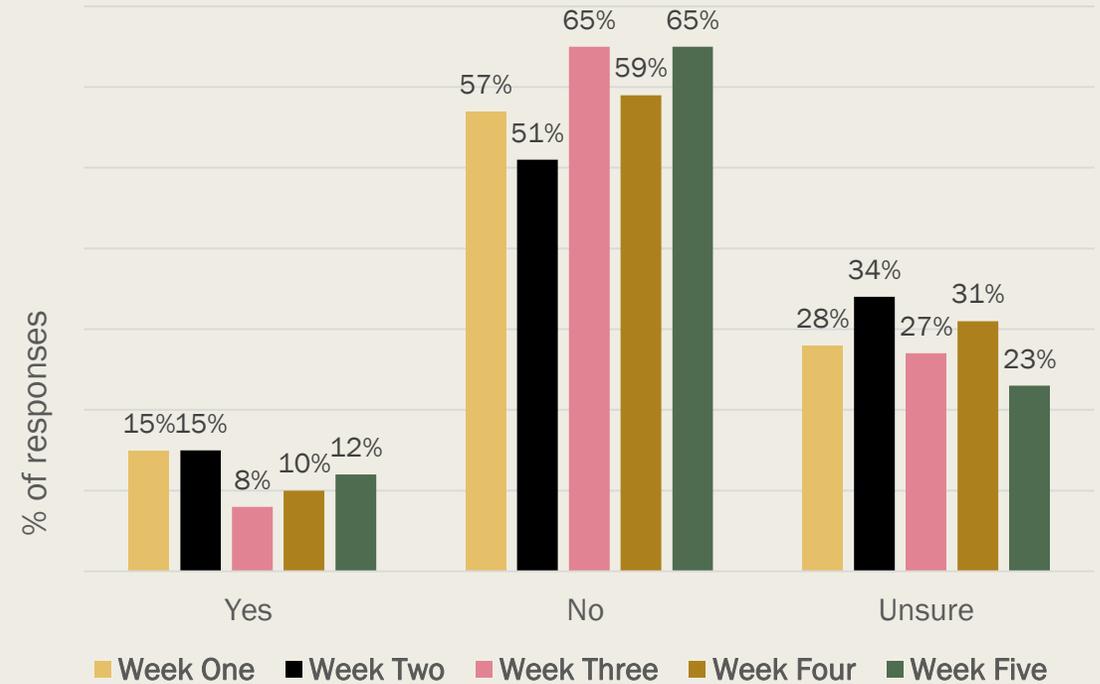


# Workforce

Percentage of workforce that has been laid off or furloughed since the start of COVID-19

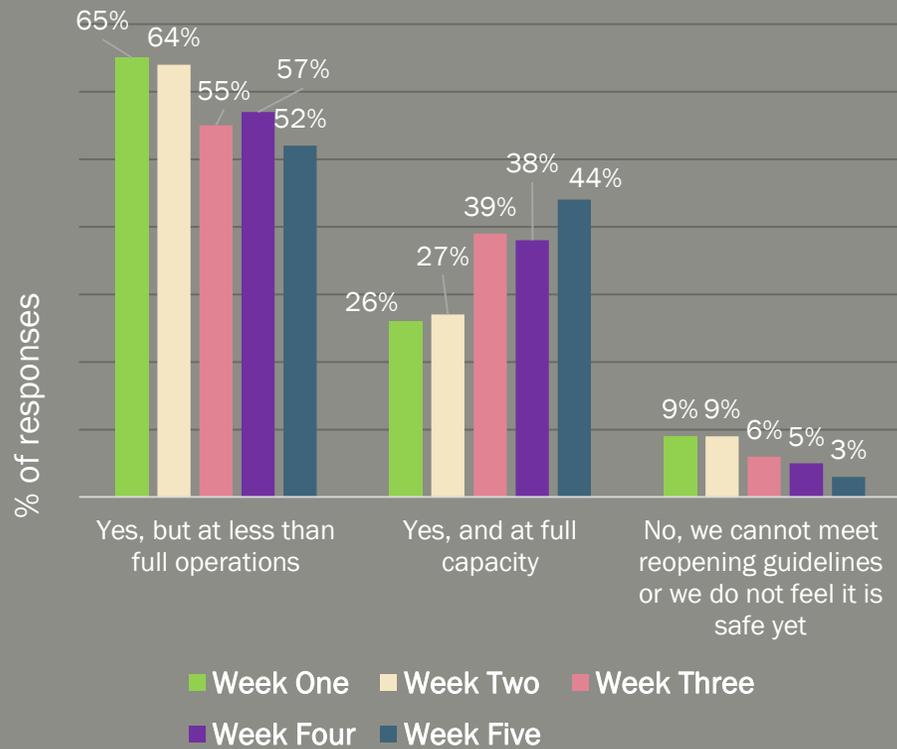


Expected layoffs and furloughs in the next month

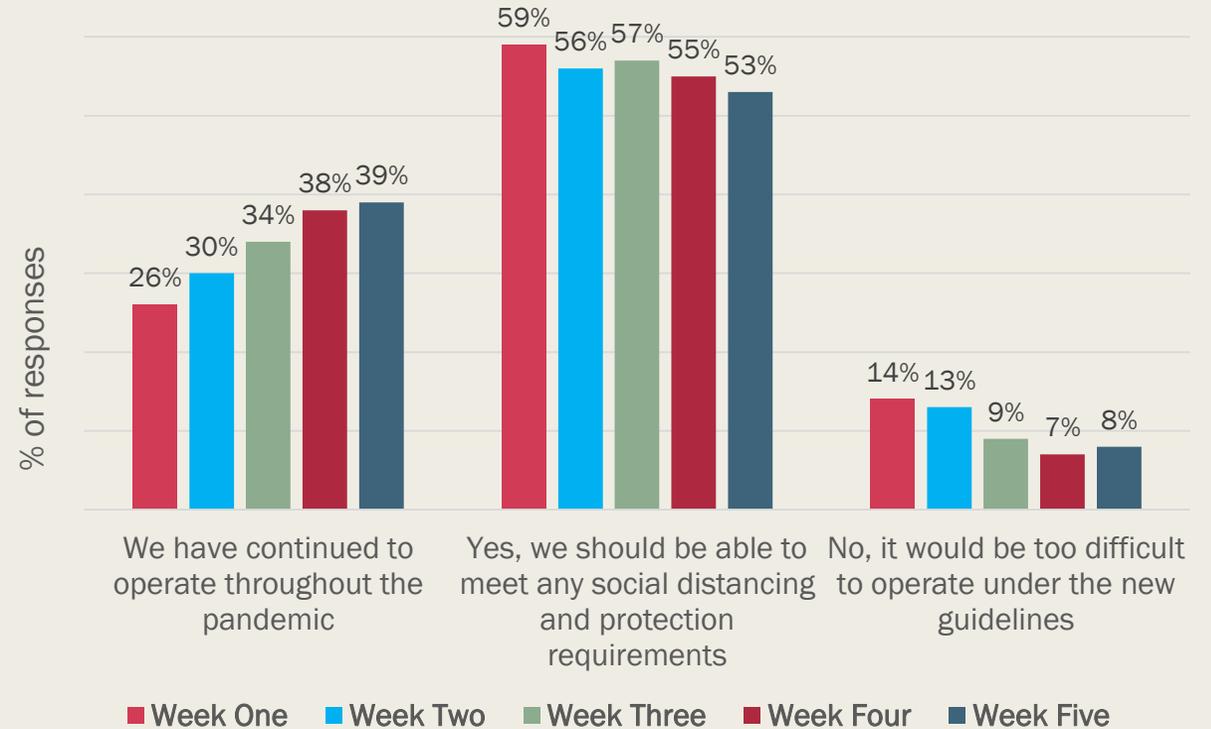


# Reopening Plans

As restrictions are lifted and businesses are permitted to reopen, will you participate?

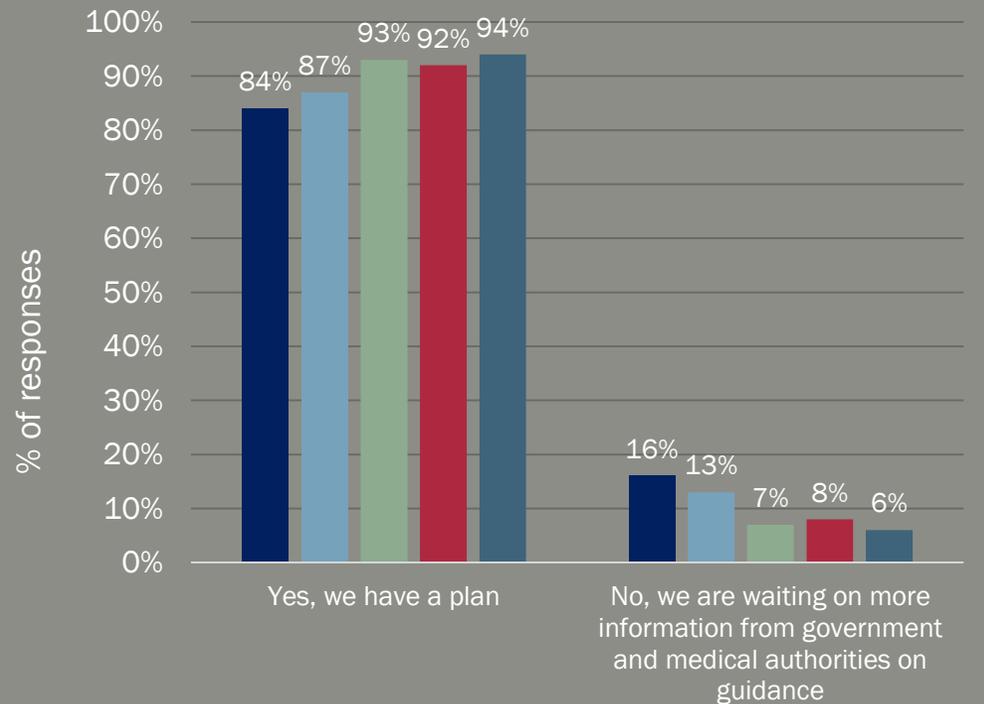


As restrictions are *partially* lifted, is your business able to reopen?



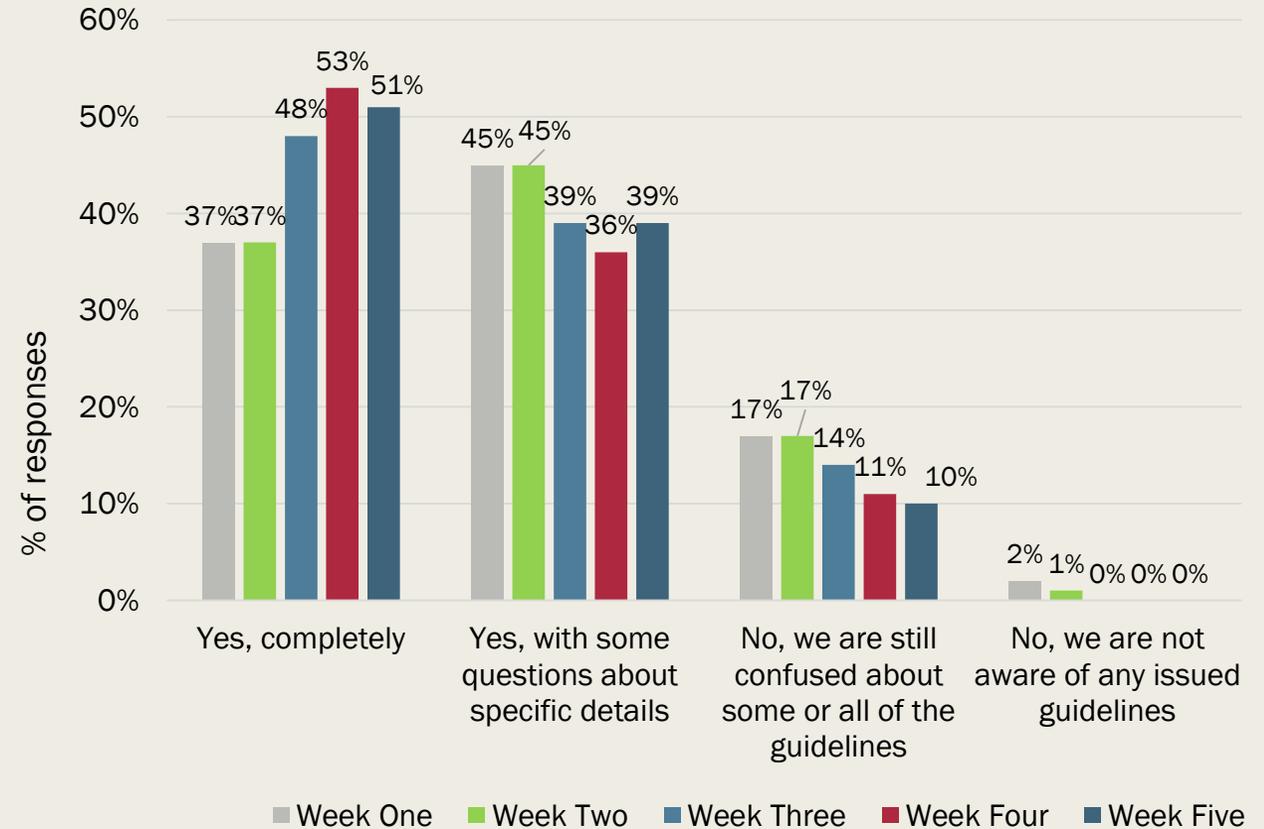
# Reopening Plans

Has your business developed plans for keeping employees and customers safe when operations are restarted?



■ Week One ■ Week Two ■ Week Three ■ Week Four ■ Week Five

Do you feel as though you understand the guidelines under which businesses like yours can reopen?



■ Week One ■ Week Two ■ Week Three ■ Week Four ■ Week Five



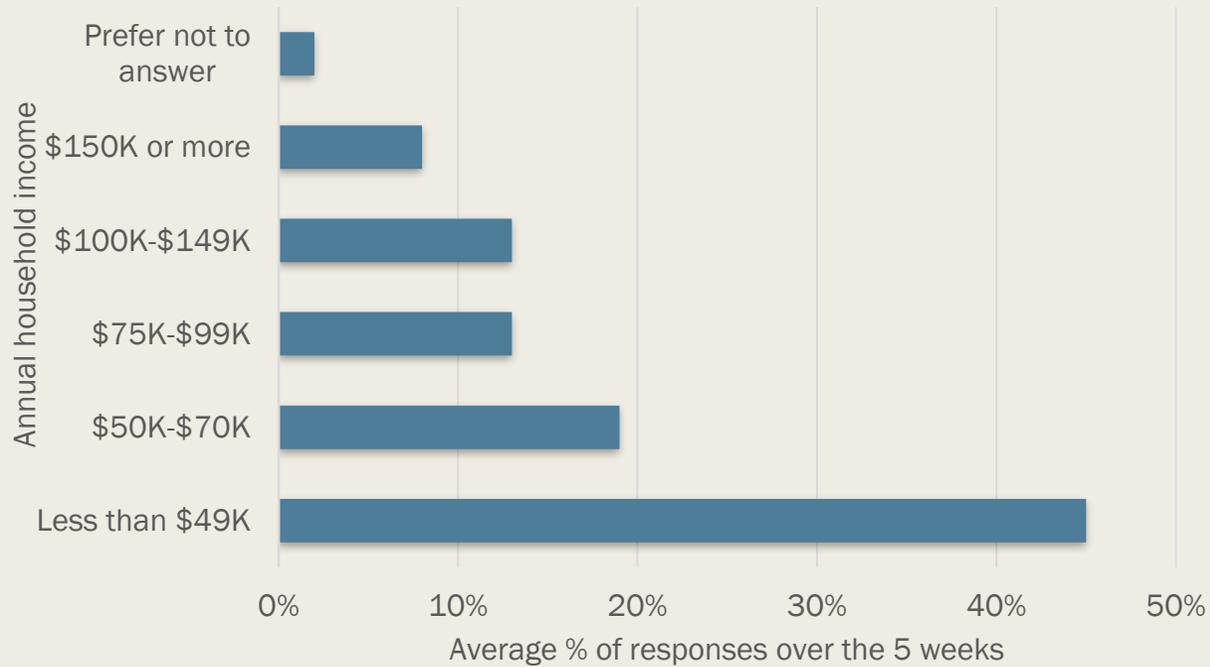
# CONSUMER SENTIMENT SURVEY

*Week One—Five Results*

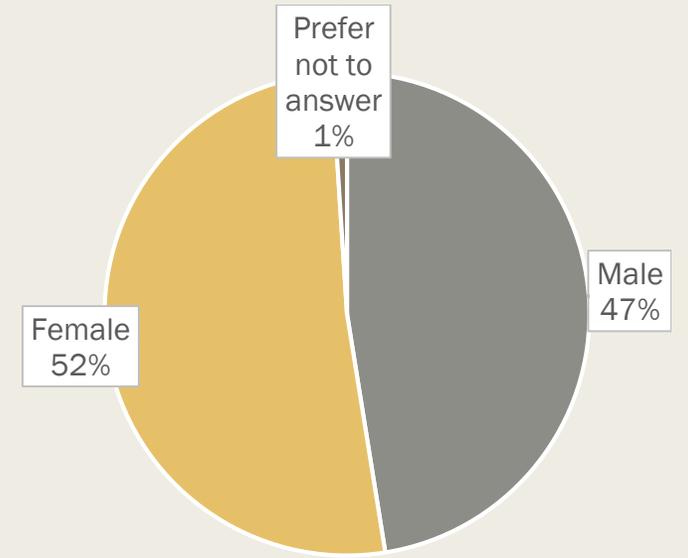


# Respondent Demographics

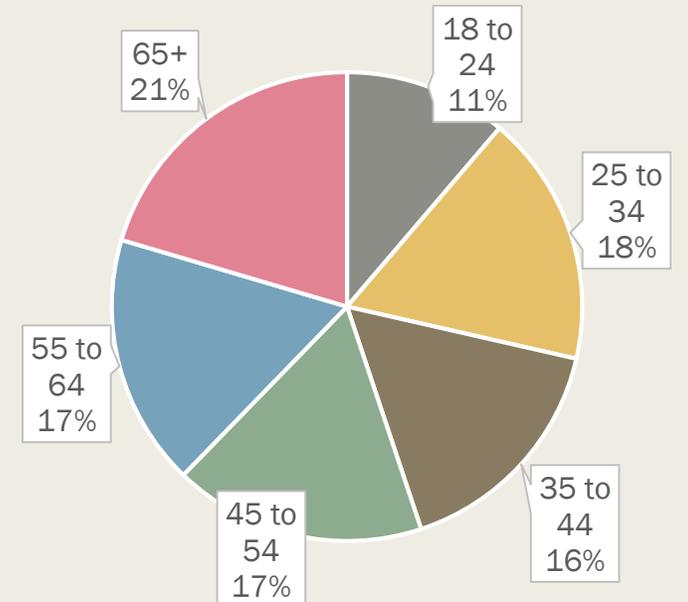
## Annual Household Income (before taxes)



## Gender

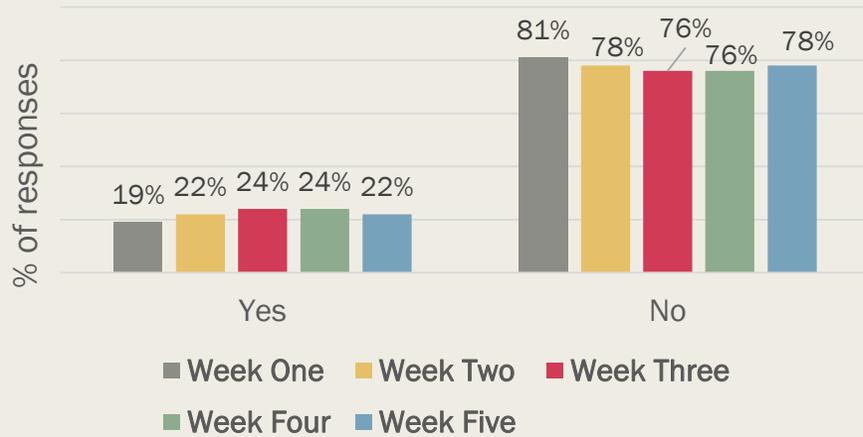


## Age

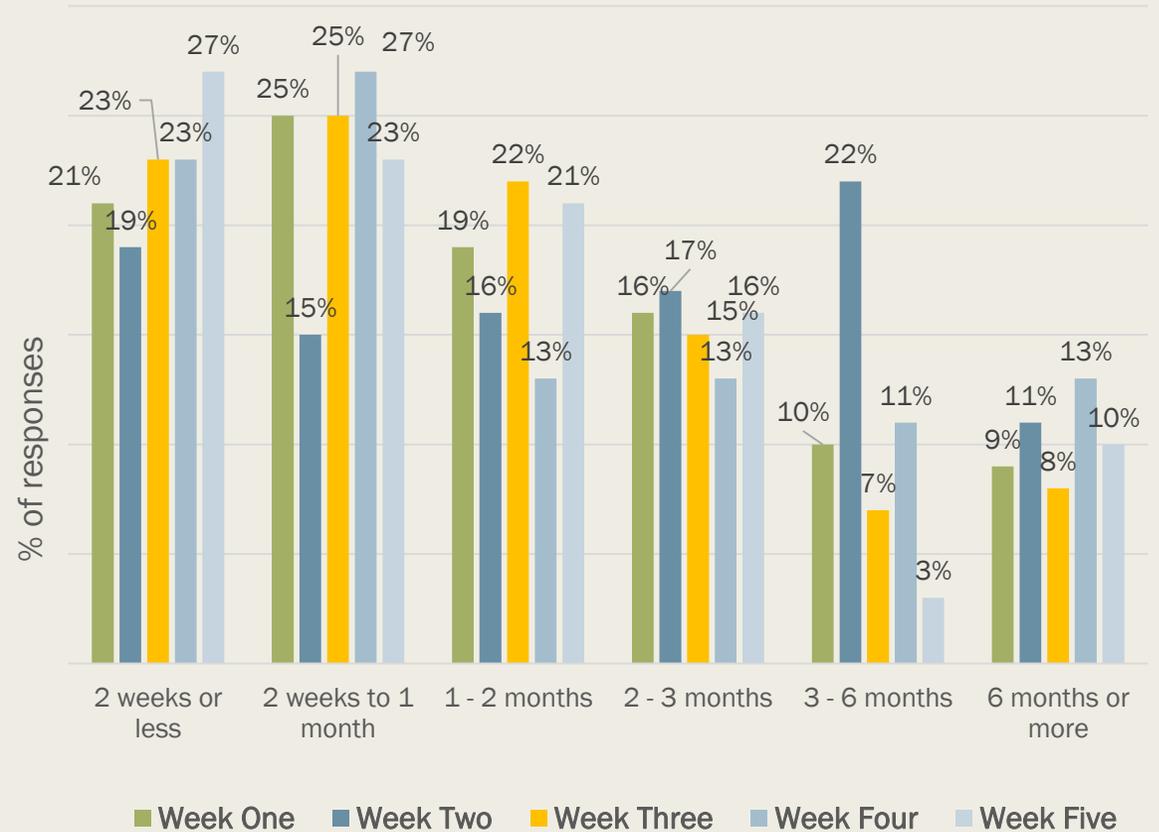


# Employment

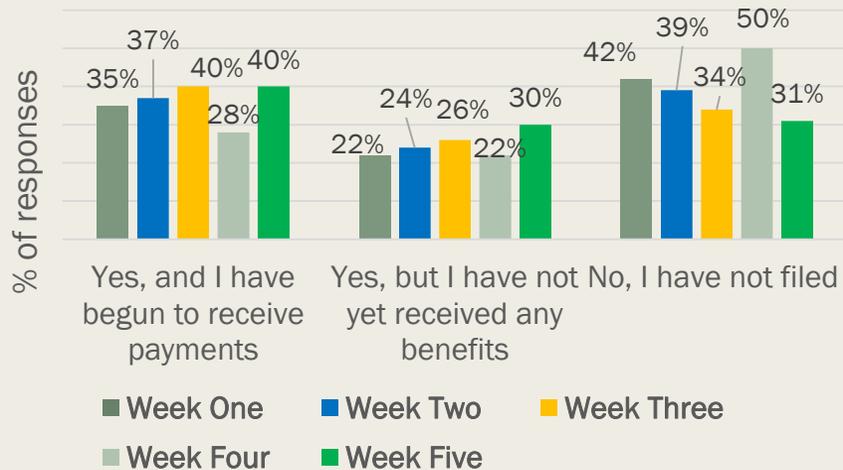
Have you been laid off or furloughed?



Between unemployment insurance benefits, and stimulus money, how long can your household maintain without returning to work?

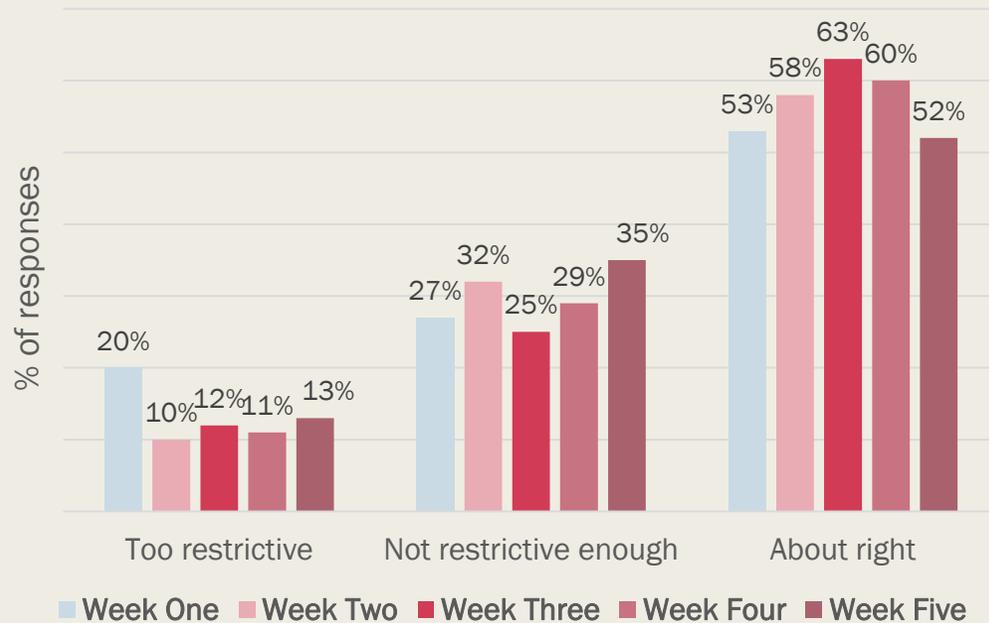


Have you filed for Unemployment Insurance?

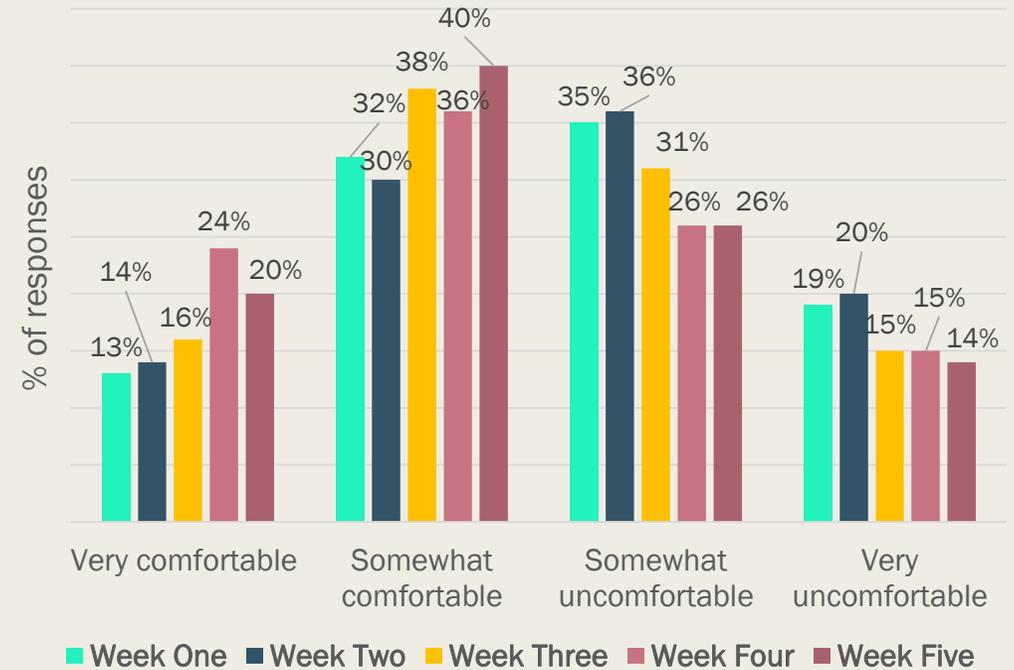


# Indiana's Restrictions

How do you feel about Indiana's reopening plan?



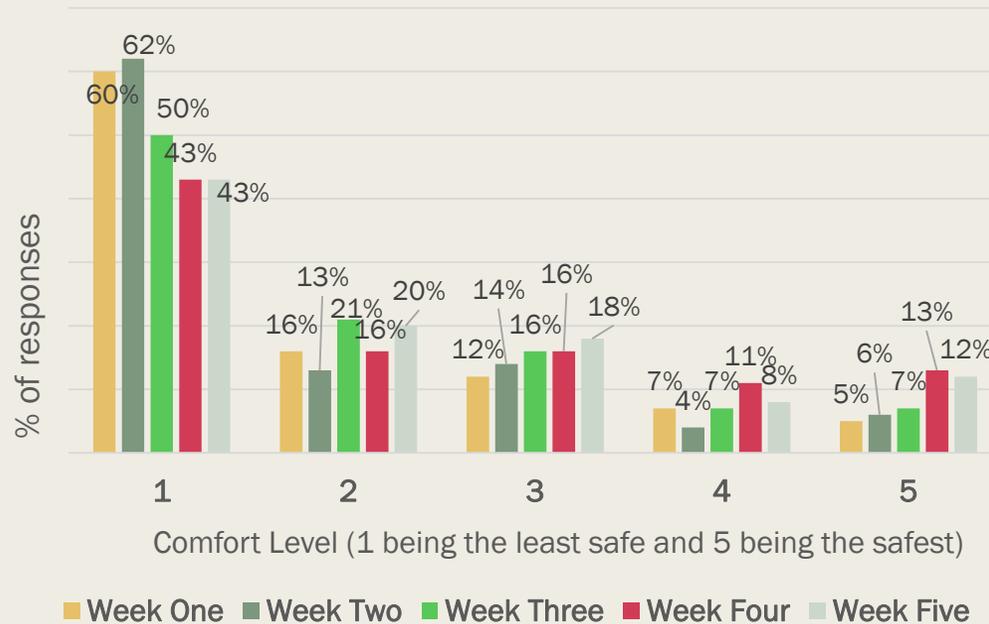
With restrictions being lifted, how comfortable are you with visitors returning to your community



# Consumer Comfort Levels

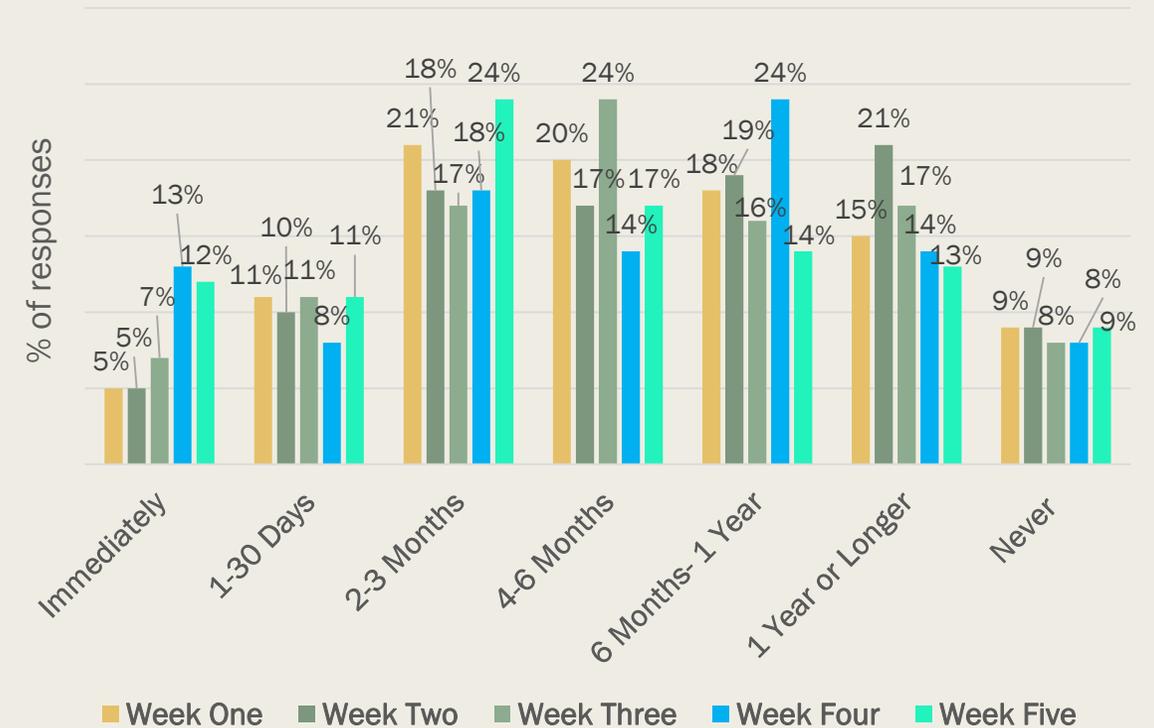
On a scale of 1-5, with 1 being the least and 5 being the safest – **how safe do you feel** doing the following?

## Attending a sporting event or concert



As the restrictions are relaxed and businesses reopen, **how long will it take you** to do the following?

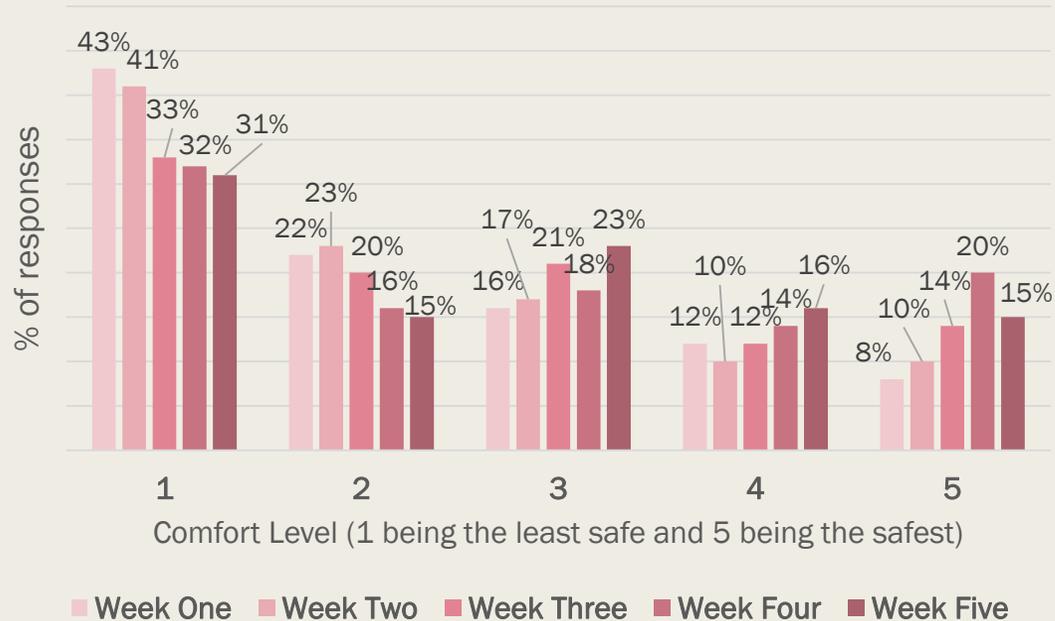
## Attending a sporting event or concert



# Consumer Comfort Levels

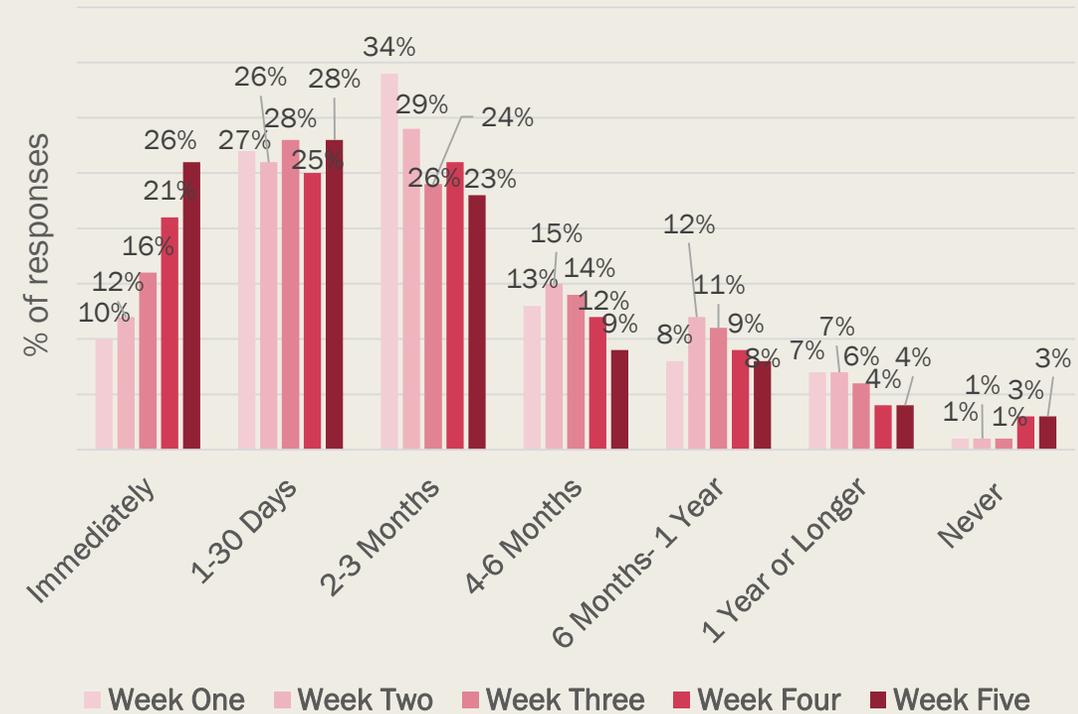
On a scale of 1-5, with 1 being the least and 5 being the safest – **how safe do you feel** doing the following?

## Dine out at an indoor restaurant



As the restrictions are relaxed and businesses reopen, **how long will it take you** to do the following?

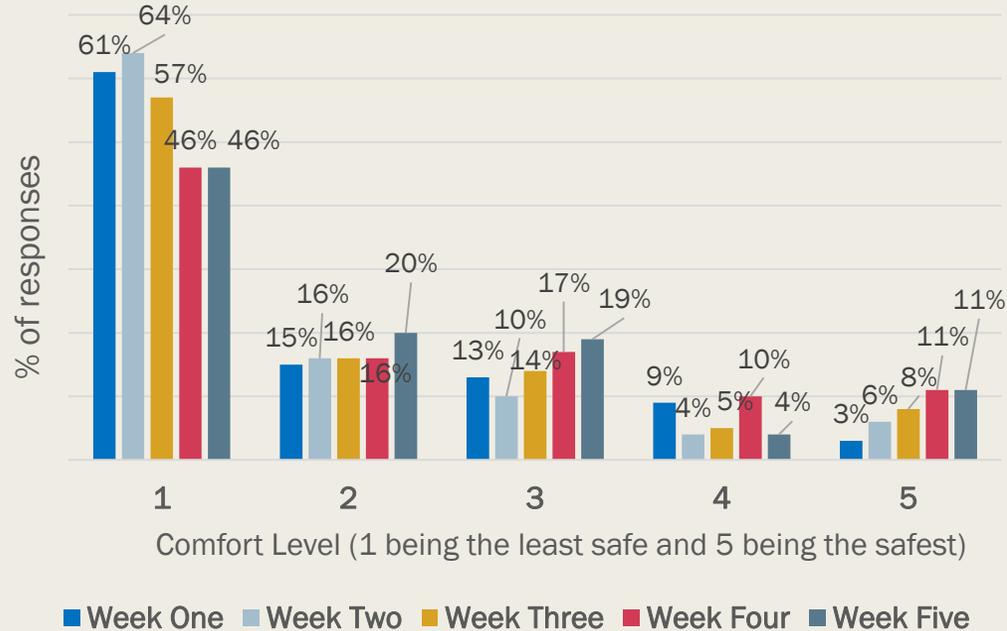
## Dine out at a restaurant



# Consumer Comfort Levels

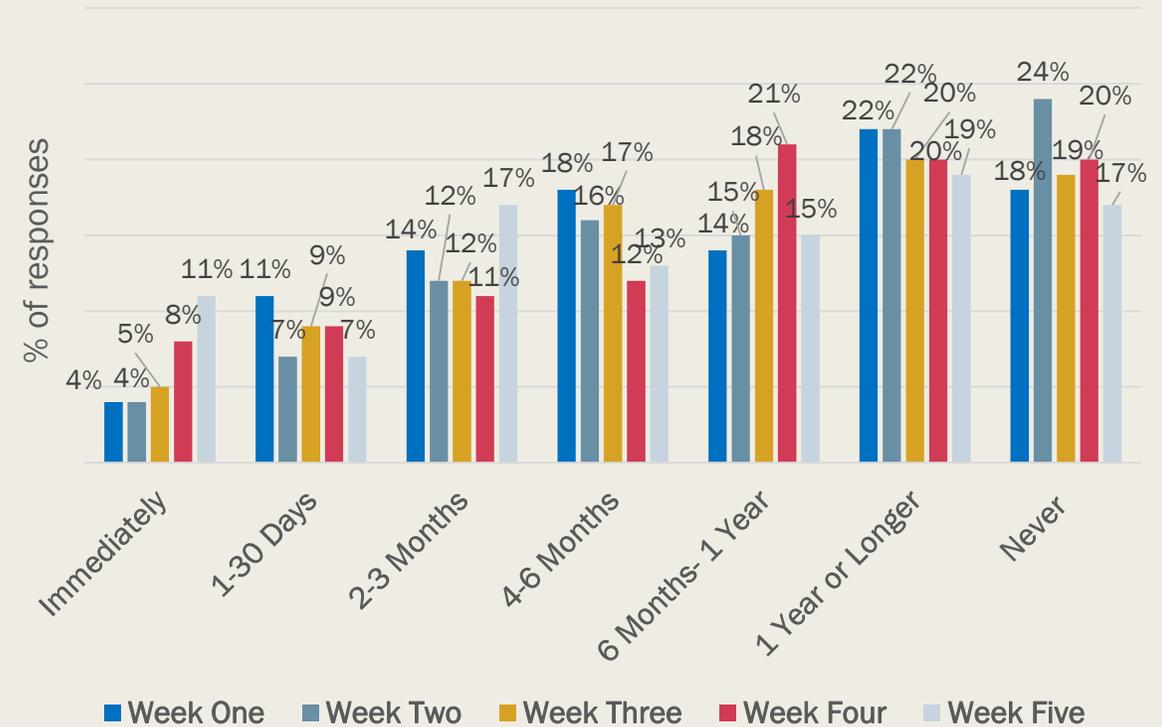
On a scale of 1-5, with 1 being the least and 5 being the safest – **how safe do you feel** doing the following?

## Travel on an airplane



As the restrictions are relaxed and businesses reopen, **how long will it take you** to do the following?

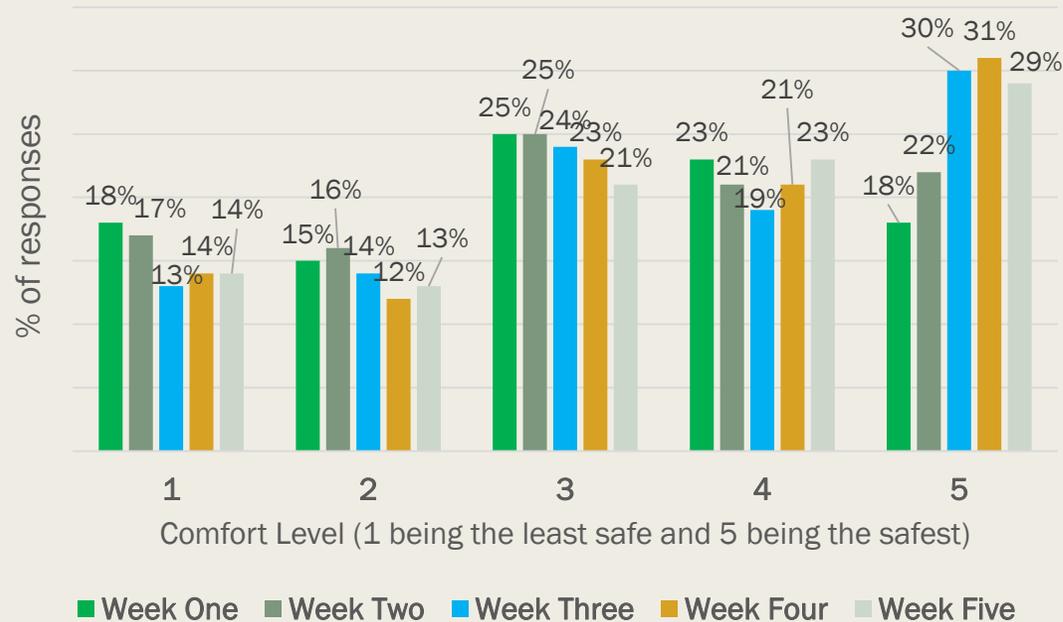
## Travel on an airplane



# Consumer Comfort Levels

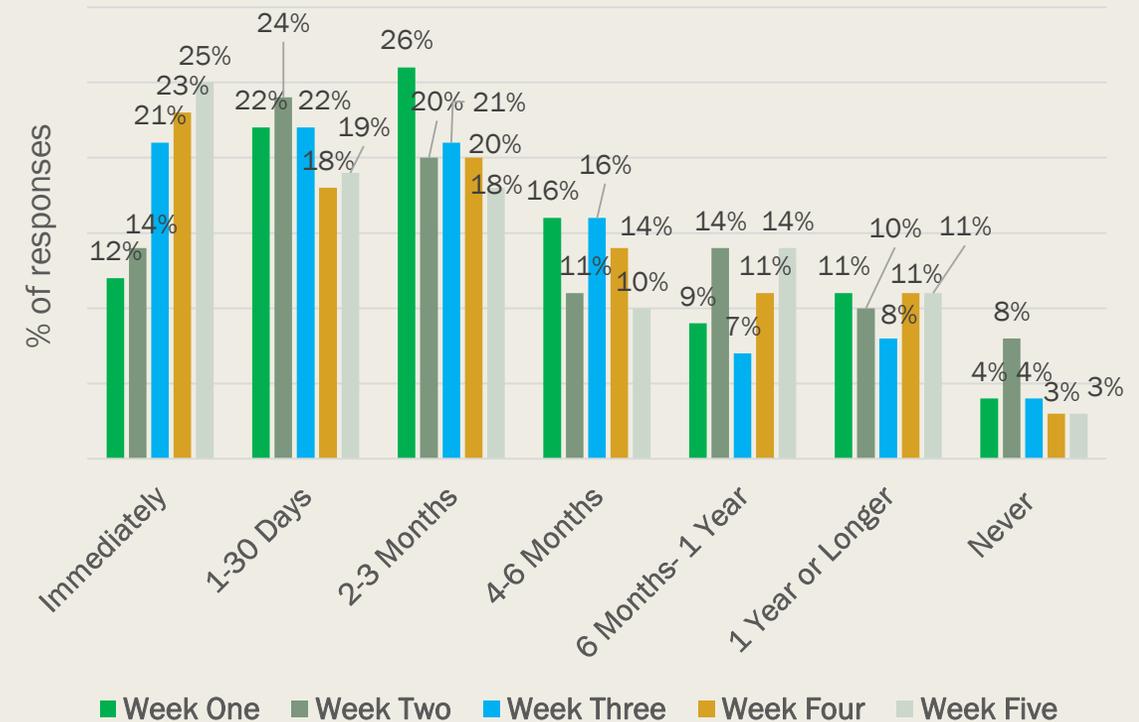
On a scale of 1-5, with 1 being the least and 5 being the safest – **how safe do you feel** doing the following?

## Visit an outdoor attraction or park



As the restrictions are relaxed and businesses reopen, **how long will it take you** to do the following?

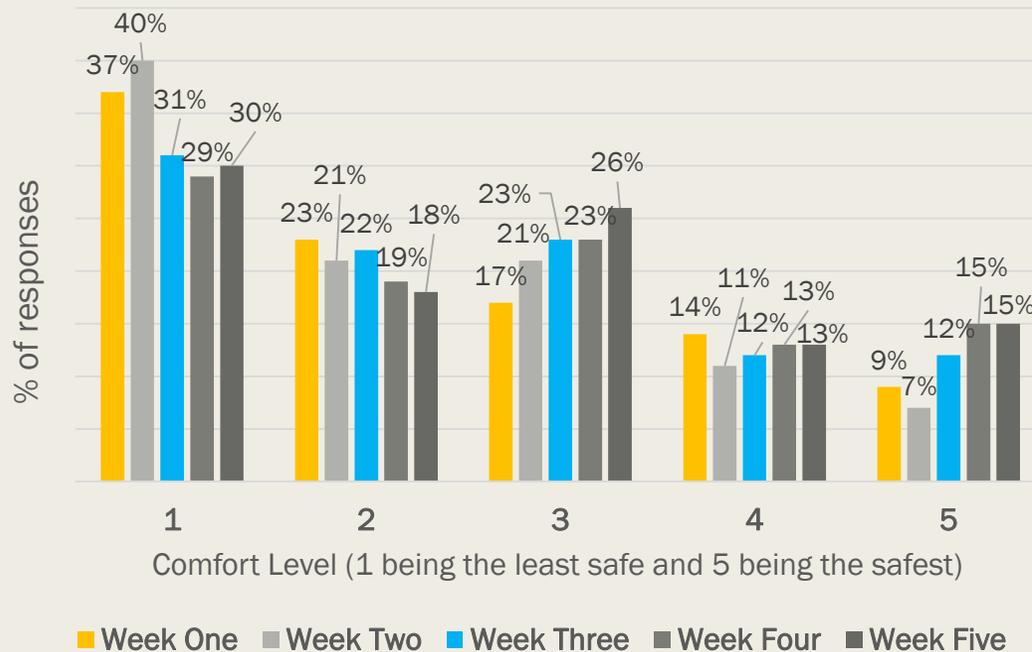
## Visit an outdoor attraction or park



# Consumer Comfort Levels

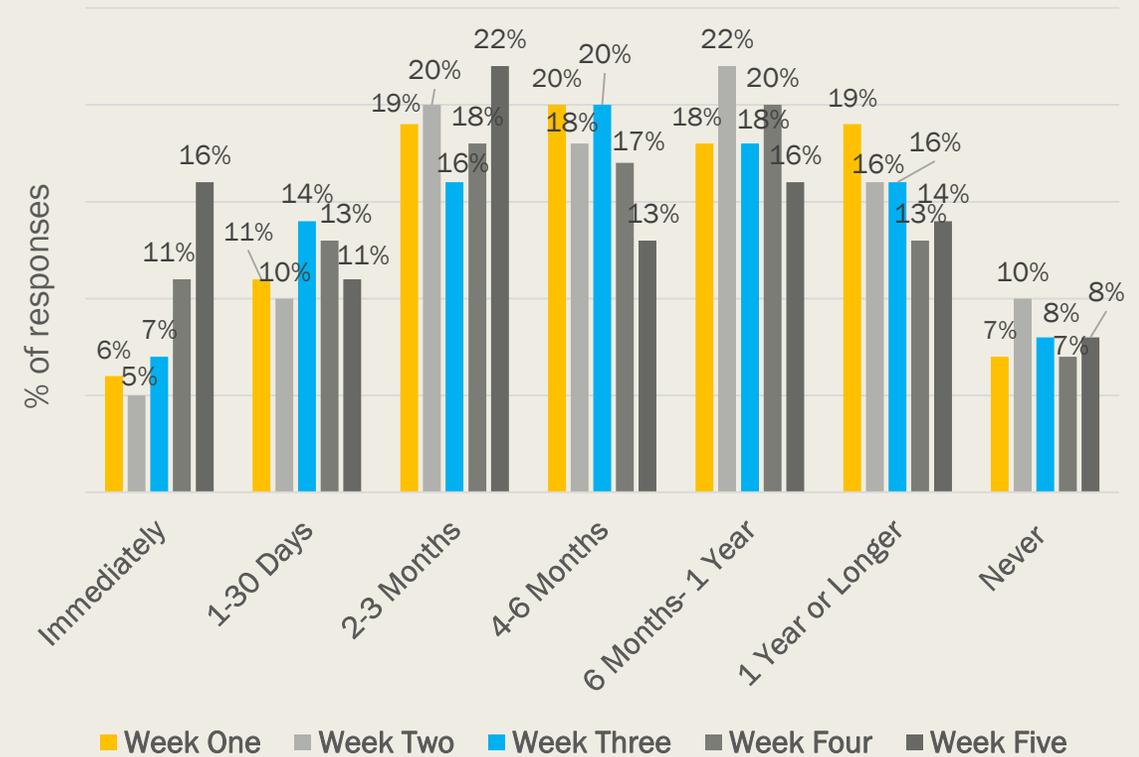
On a scale of 1-5, with 1 being the least and 5 being the safest – how safe do you feel doing the following?

## Stay at a hotel



As the restrictions are relaxed and businesses reopen, how long will it take you to do the following?

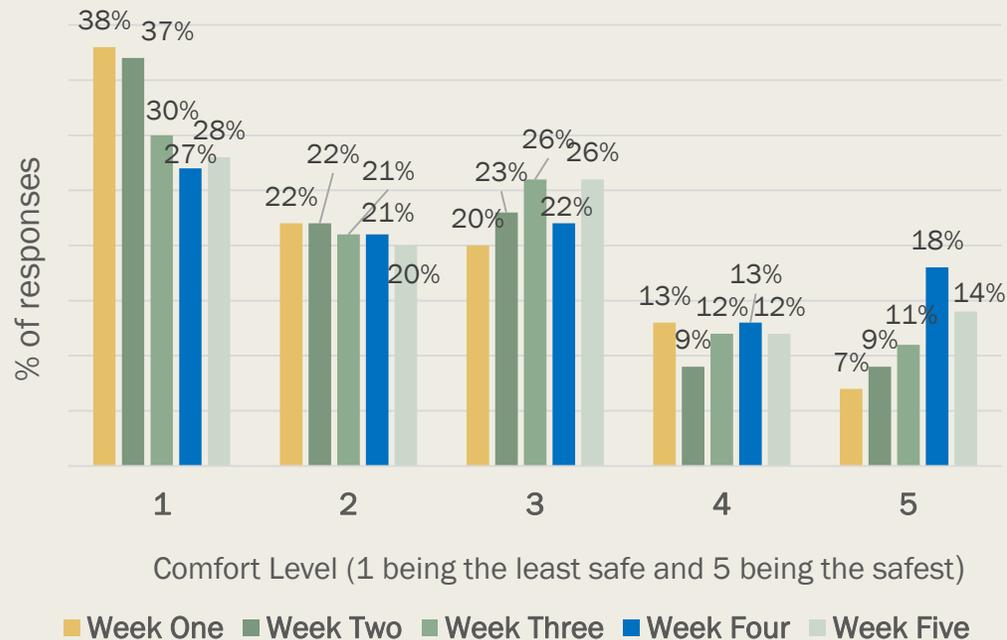
## Stay at a hotel



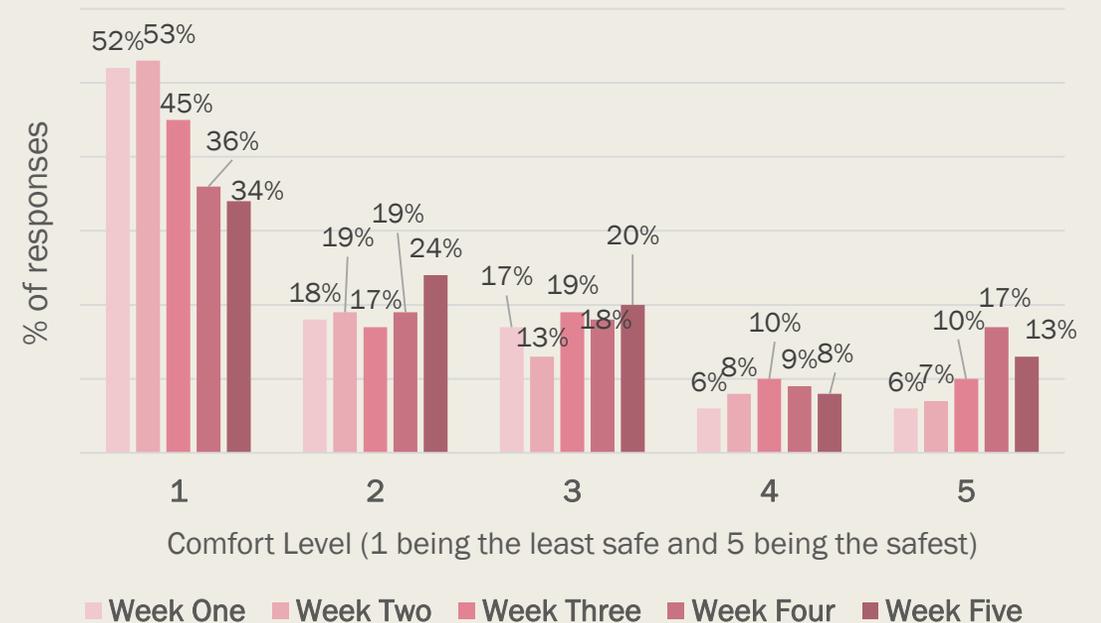
# Consumer Comfort Levels

On a scale of 1-5, with 1 being the **least** and 5 being the **safest** – how safe do you feel doing the following activities?

## Shop at the mall or outlet store



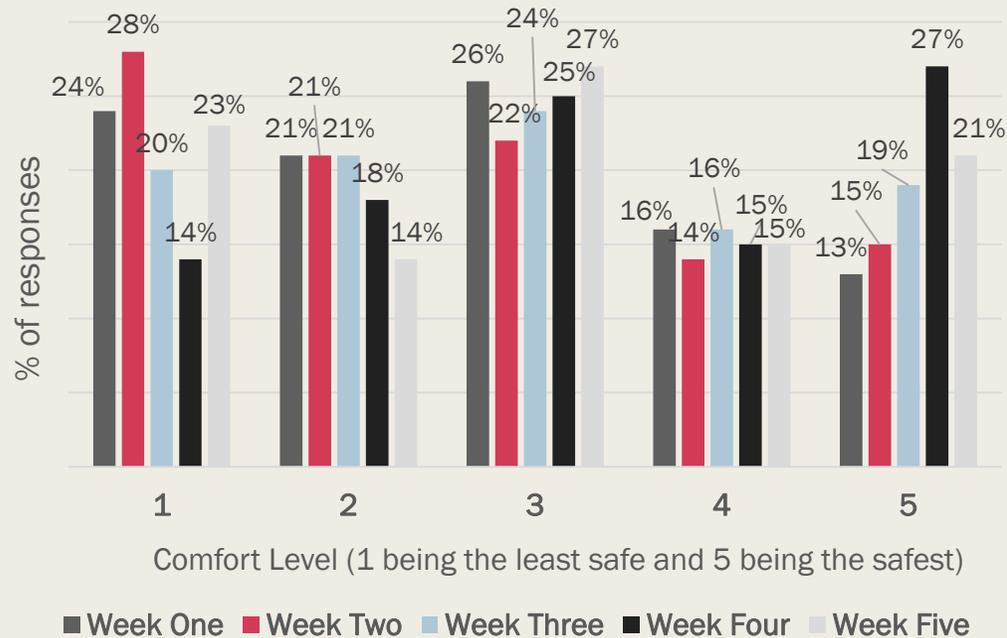
## Send your kids to school



# Consumer Comfort Levels

On a scale of 1-5, with 1 being the **least** and 5 being the **safest** – how safe do you feel doing the following activities?

## Work from the Office



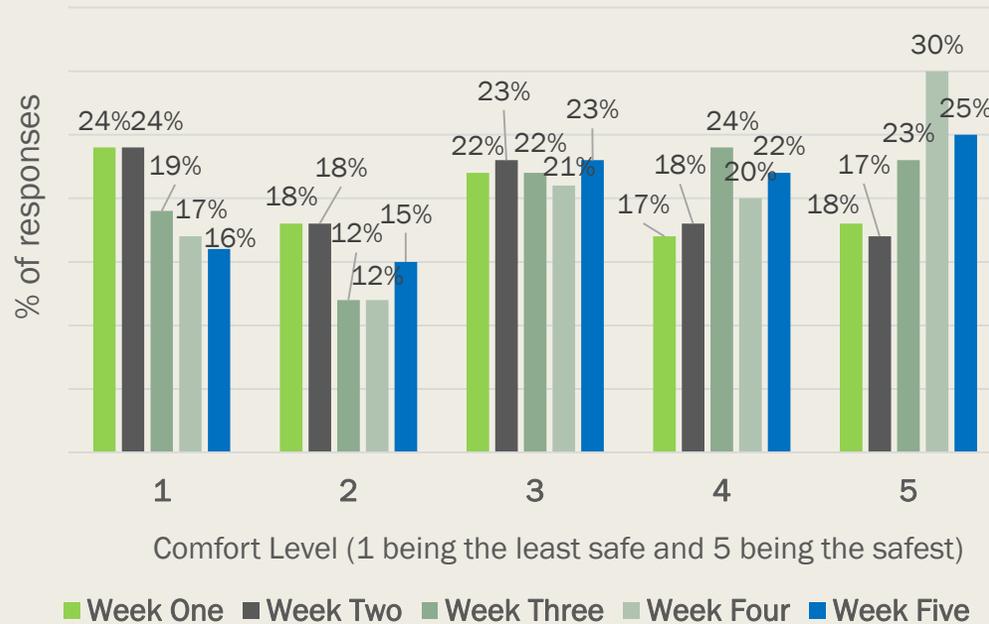
## Visit the doctor or a hospital



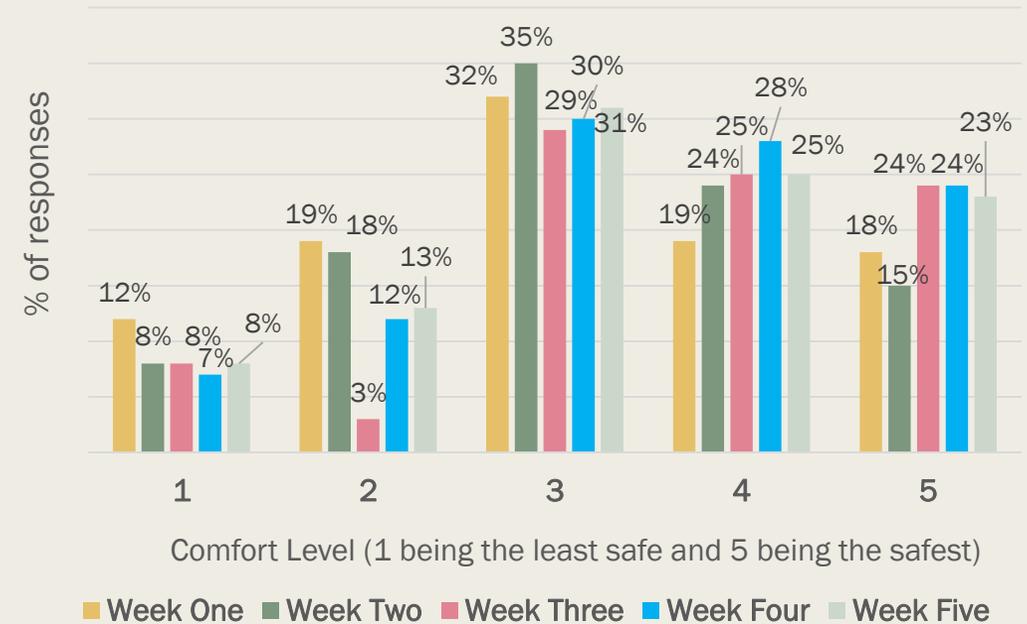
# Consumer Comfort Levels

On a scale of 1-5, with 1 being the **least** and 5 being the **safest** – how safe do you feel doing the following activities?

## Camp at a campground

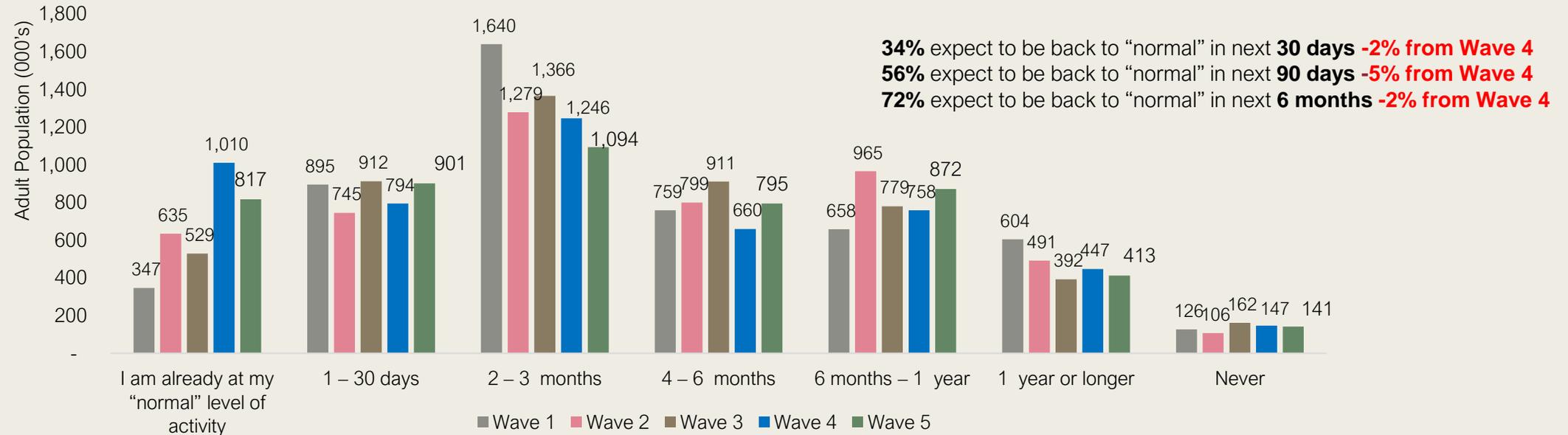


## Go to the grocery store



# Looking Ahead

**When do you anticipate you will go back to your normal level of social activity social activity (i.e., your level of activity before coronavirus)?**

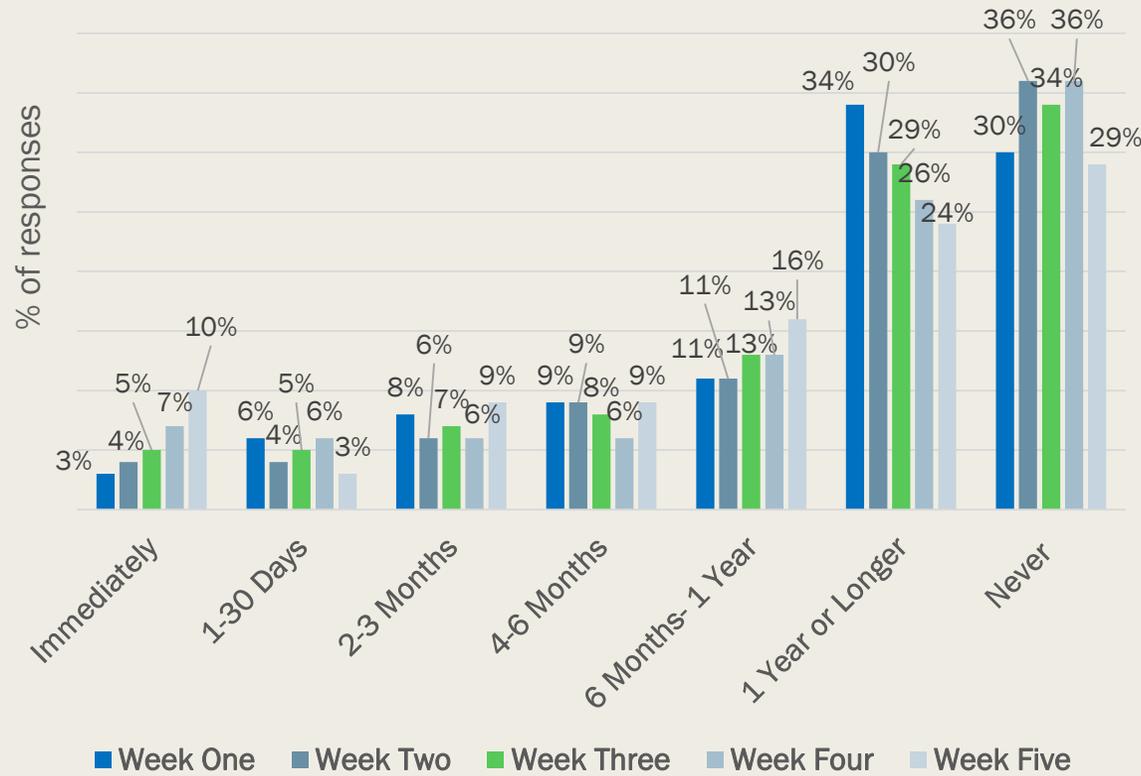


- The Indiana adult population is approximately 5M people and that information was used to conduct this predicative analysis
- Within the last week, roughly 16%, or about 817.5 million Indiana residents, said they are “already at their ‘normal’ level of activity”. This represents a drop of 4 points compared to Wave 4, but the highest rate since Wave 2. Responses to this question have been mixed across the 5 survey Waves, although the trend remains on an upward track. Perhaps as Hoosiers ventured out into reopened businesses and attempted to “return to normal”, they found the new reality to be quite different than their pre-pandemic experience.
- Over the next 30 days, an additional 900 thousand Hoosiers expect to be back at their normal level of social activity, bringing the total to 1.7 million or about 34% of the adult population of Indiana. This represents a decline of 2 points from the 36% who expected to be back to ‘normal’ in Wave 4. A total of roughly 2.8 million residents (56%) expect to be back to normal within the next 90 days, a rate that also fell from last week’s 61%. Although Hoosiers have generally grown more optimistic over the past five weeks, the overall number who expect to be back to normal within 6 months did fall by 2 points from last week to 72%.

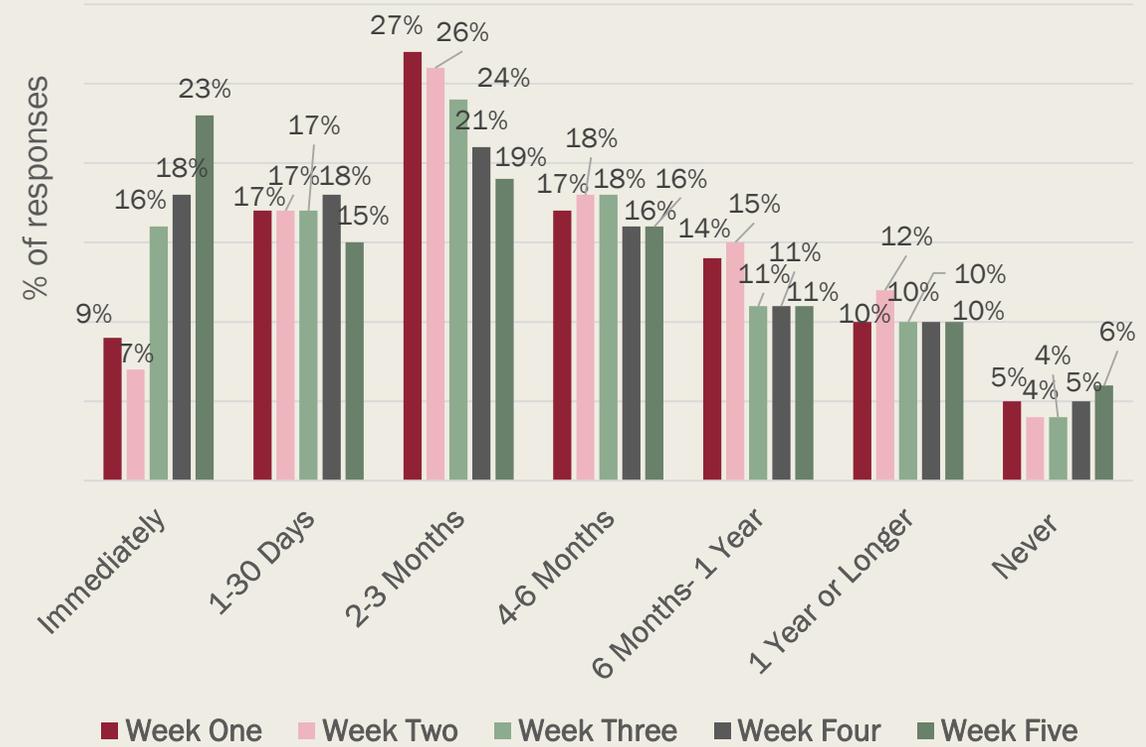
# Looking Ahead

As the restrictions are relaxed and businesses reopen, *how long will it take you to do the following?*

### Travel outside the country



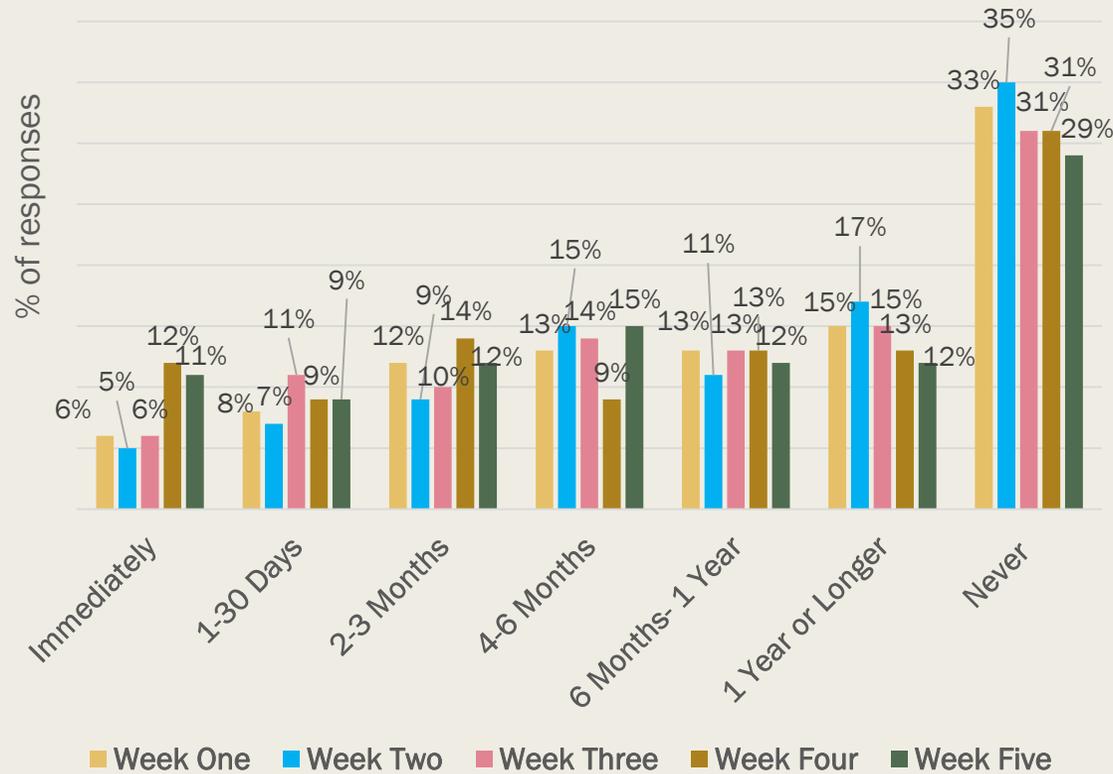
### Take a vacation by car



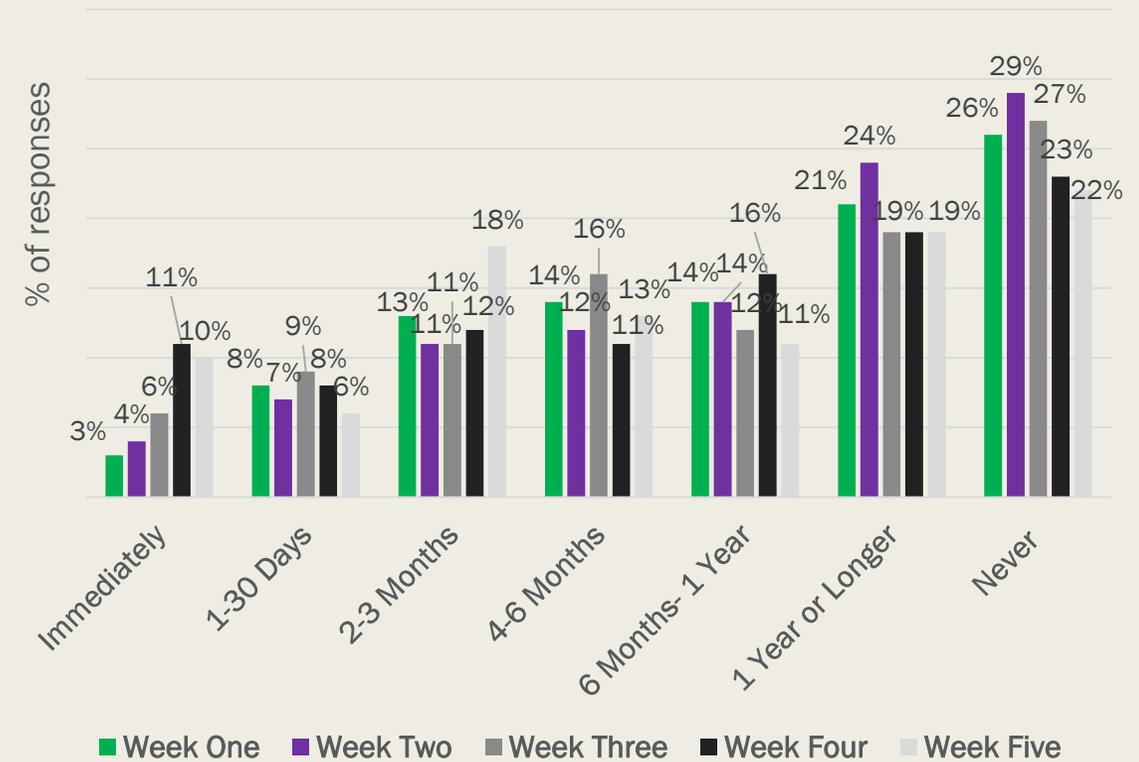
# Looking Ahead

As the restrictions are relaxed and businesses reopen, *how long will it take you to do the following?*

## Take public transportation



## Visit Casino



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