

UPCOMING WEBINAR:

US Travel Outlook Destinations that Appeal Peer to Peer Travel Practical Takeaways

March 10th 2016

THE STATE OF THE AMERICAN TRAVELER

Destination Analysts
Destinations Edition
January 2016 | Volume 19

Destinations Poised for Success in 2016

American destinations can expect high levels of excitement around leisure travel segments this year. In our latest Destinations Edition of this study, 34.2 percent of travelers said that they will increase the number of leisure trips taken this year, up from 31.1 percent one year earlier. 34.4 percent also now plan to devote more money to travel. Demand for leisure travel is strong across regions, destination types and income brackets, but is most pronounced amongst younger, urban residents.

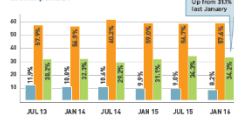
Sponsored By **miles**
marketing destinations

SNAP SHOT

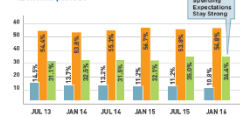
Americans planning to increase leisure travel spending in the next 12 months

34%

Q: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?



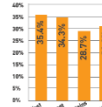
Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?



Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

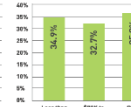
Region of Residence

(% region planning to travel more)



Annual Household Income

(% income planning to travel more)



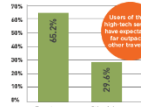
Generations

(% age planning to travel more)



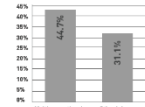
Peer-to-Peer Lodging Guests

(% planning to travel more, comparison)



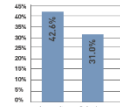
Multi-Generational Travelers

(% planning to travel more, comparison)



Place of Residence

(% planning to travel more, comparison)



*The data taking a website such as Airbnb, Homestay or VRBO to book leisure accommodations in past 12 months

**Travelers taking a trip that included at least three generations of travelers in past 12 months

Destination Analysts, Inc. | January 2016 | Destination Analysts

page 1

DESTINATIONS EDITION

State of the American Traveler

Miles & Destination Analysts. March 10th 2016

Greetings



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In Association with



SPRING SYMPOSIUM 2016 APRIL 4-6 BATON ROUGE, LA

“What We Talk About When We Talk About the South”

Chuck Reece “Co-Founder/Editor in Chief | *The Bitter Southerner*

“Food, Culinary, Tourism :A mature Industry. What Now?”

Chef John Folse, Jay Ducote, Chef Celeste Gill, Ruffin Rodrigue

“Outlook On The Attractions Industry”

Jerry Henry, President & CEO



STS Marketing College MAY 15 – 20, 2016



University of North Georgia, Dahlonega, Georgia

- 3 Year Program to earn Travel Marketing  Professional Certification

- Festival & Events Certification Track

- Sunday Reception *Montaluce Winery*

- Monday Dinner *Smith House*

- Wednesday Picnic *Blue Mountain Vineyards*

ORIENTATION KEYNOTE

A Travel Analyst's Comment

ALUMNI CLASS

Destination Product Development

ALUMNI CLASS

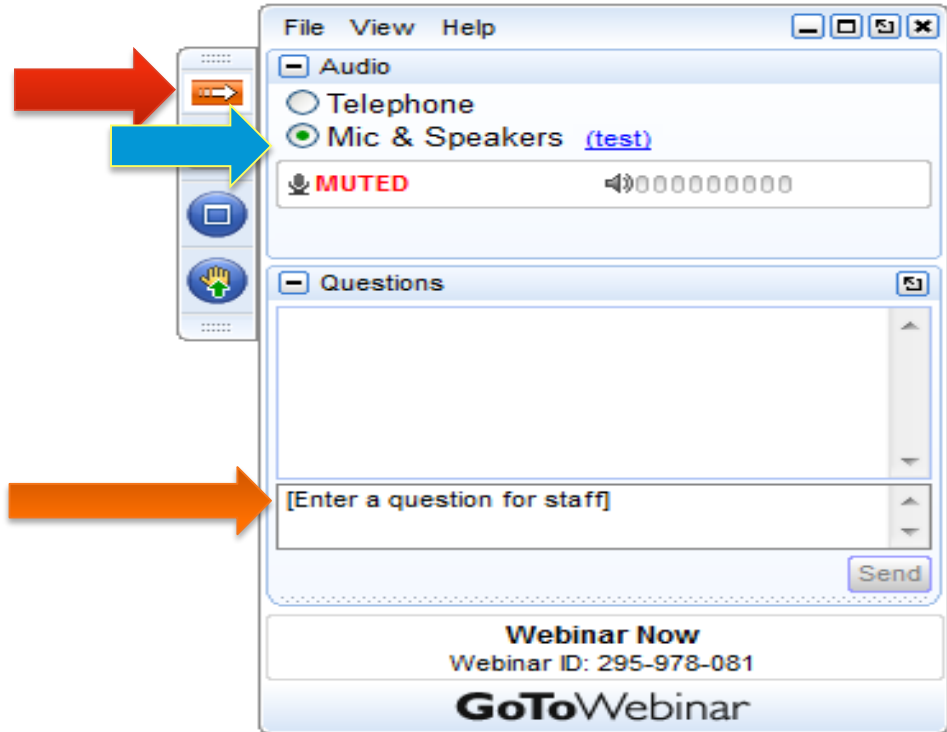
Define, Test and Shape the User's Experience

HOW TO PARTICIPATE IN TODAY'S WEBINAR

Grab Tab (open or close the control panel)

Choose your audio

Use Text Box to ask questions





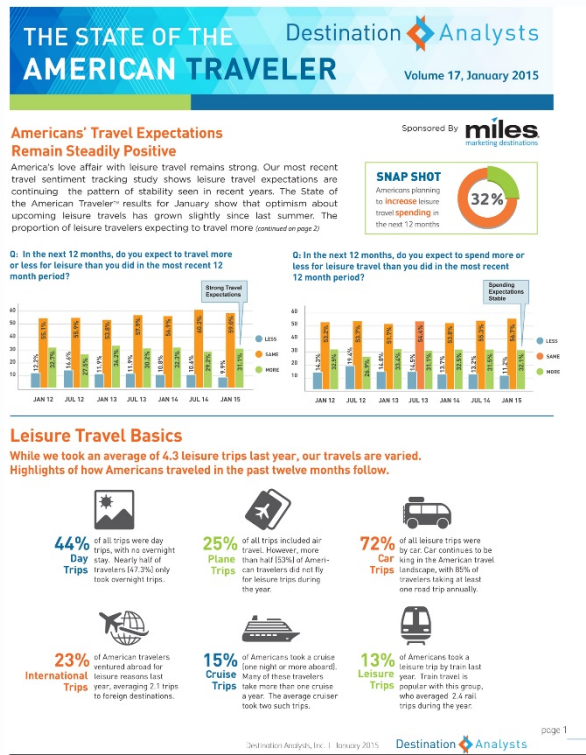
Agenda

1. Research: Travel Outlook
2. Research: Media Use by Generations
3. Research: Destinations
4. **Spotlight:** Peer to Peer/Sharing Economy
5. Summary & Takeaways

The State of the American Traveler

Summary of Latest Findings

Research Overview



- Online survey conducted since 2006
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000+ American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- January 2016

The **State** of the
American Traveler

DESTINATIONS EDITION

The **State** of the
American Traveler

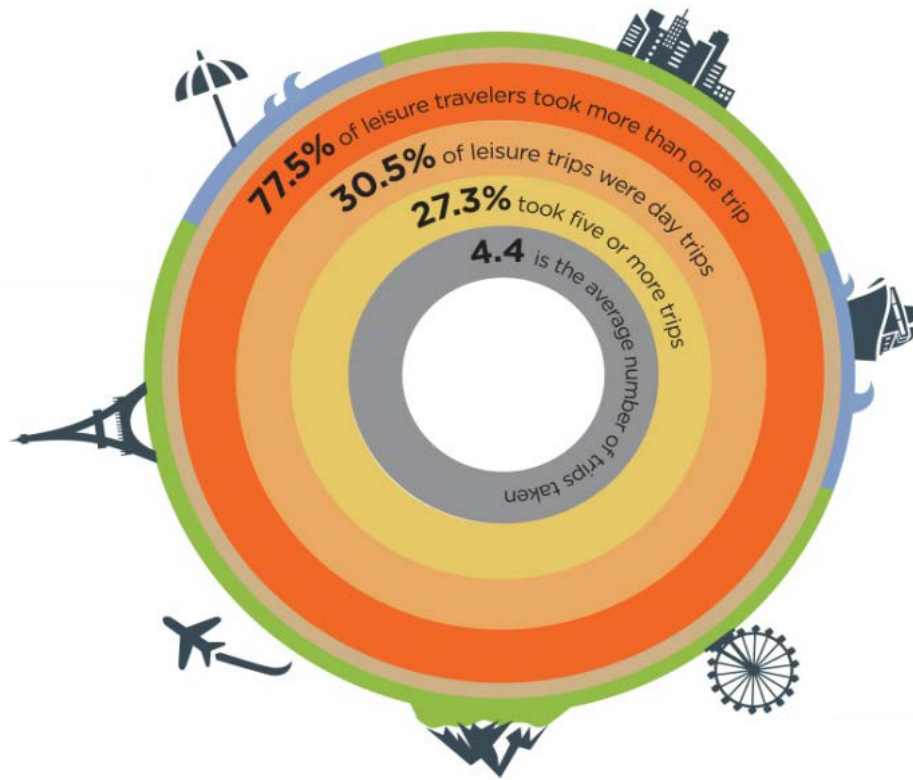
TRAVEL SENTIMENT



Average Number of Leisure Trips

4.4

How do Americans Travel?





Average Budget for Leisure Travel

\$3,445



Trips by Plane

1/4

While only one fourth (25%) of American leisure trips involved traveling by plane, 51.2 percent of travelers used an airline last year.

Multi-Generational Travelers



23%

Q: How are American travelers feeling about travel right now?

A: Ready for more



Reasons for cutting back on leisure travel



GAS TOO
EXPENSIVE



PERSONAL
FINANCIAL



AIRFARE TOO
EXPENSIVE



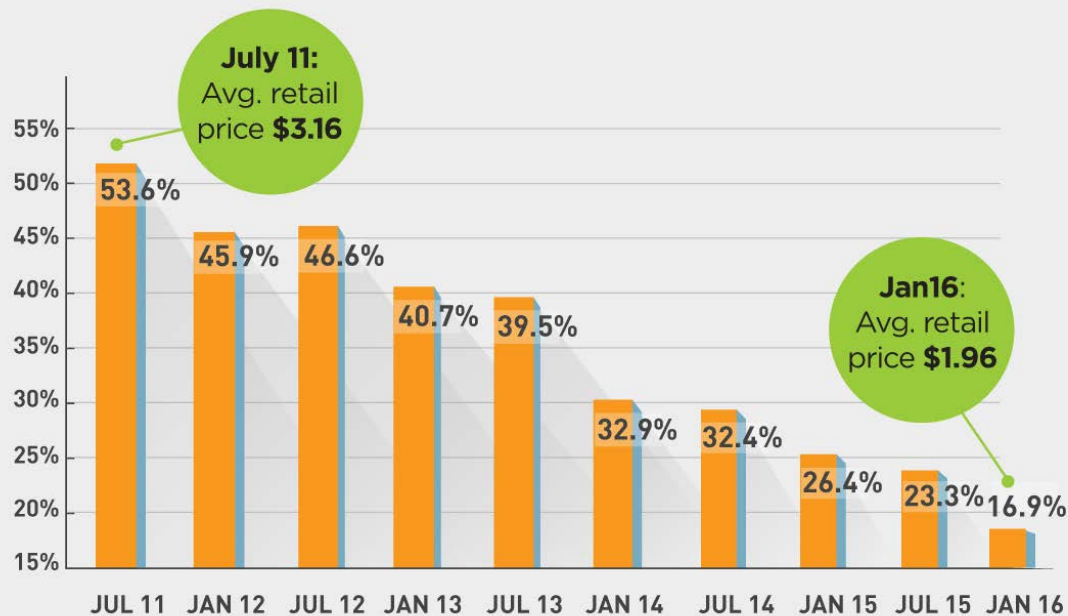
SAFETY
CONCERNS

JULY 2010	40.7%	55.9%	36.0%	8.4%
JANUARY 2011	39.3%	54.6%	34.9%	11.0%
JULY 2011	53.6%	48.9%	38.9%	8.9%
JANUARY 2012	45.9%	49.1%	35.2%	7.8%
JULY 2012	46.6%	47.6%	30.2%	8.6%
JANUARY 2013	40.7%	40.9%	32.9%	9.7%
JULY 2013	39.5%	38.6%	27.1%	9.5%
JANUARY 2014	32.9%	41.1%	25.6%	9.5%
JULY 2014	32.4%	36.8%	24.0%	9.9%
JANUARY 2015	26.4%	35.7%	19.6%	9.5%
JULY 2015	23.2%	35.8%	20.6%	10.8%
JANUARY 2016	16.9%	38.5%	22.8%	10.8%

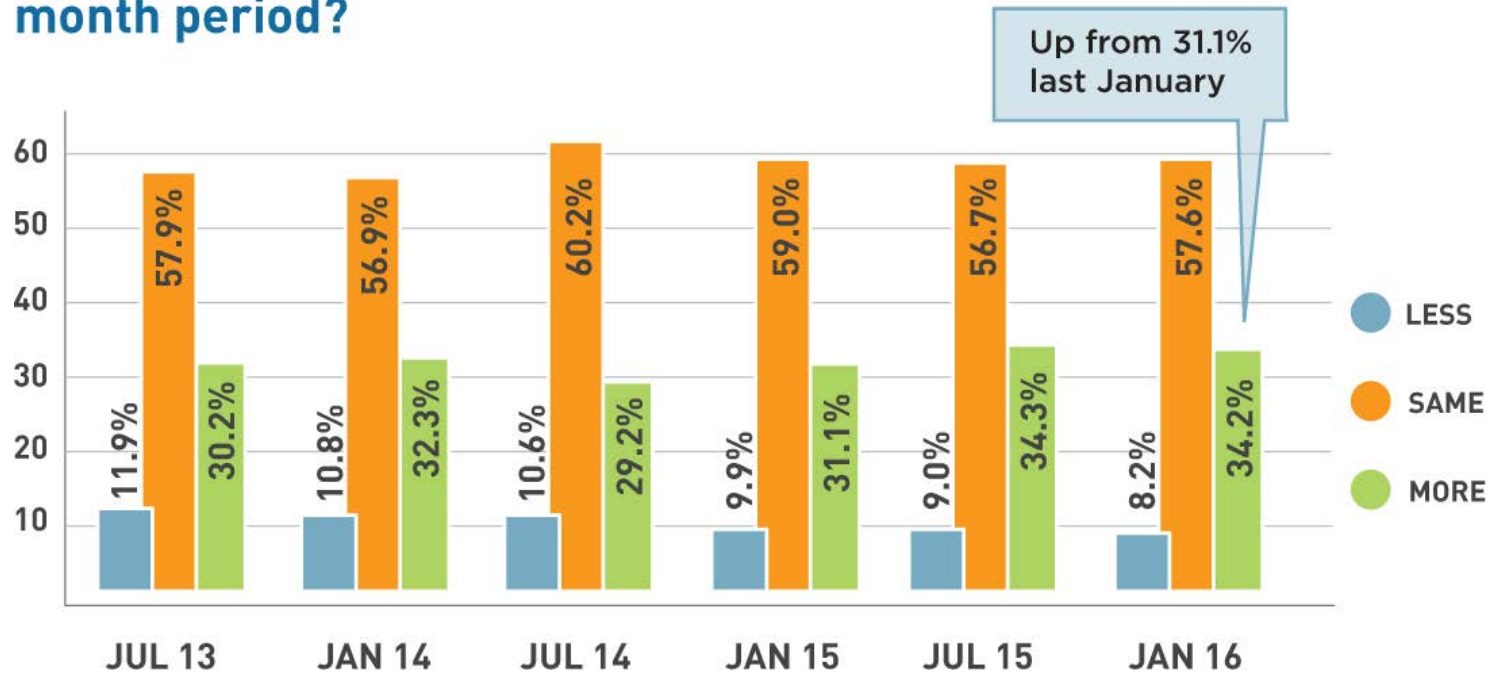


LEISURE TRAVEL & GAS PRICES

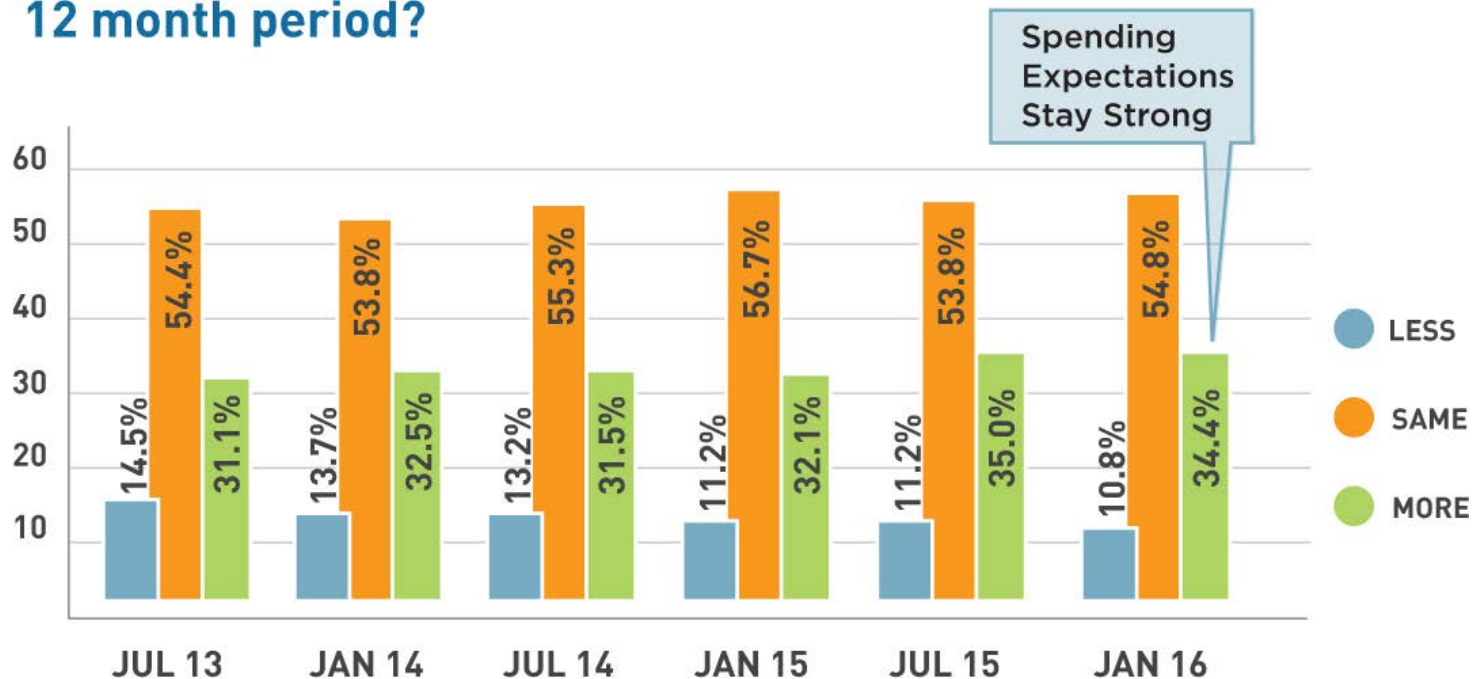
Continued improvement



Q: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?



Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

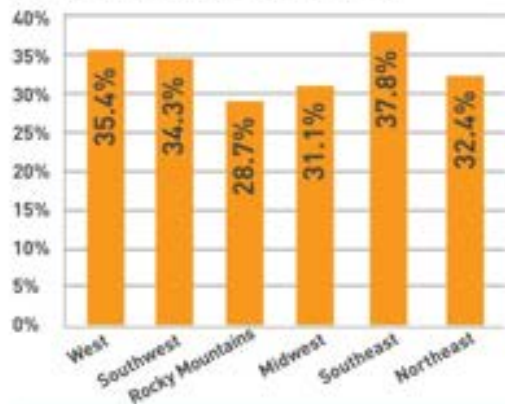


WHO Will Travel More in 2016?

Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

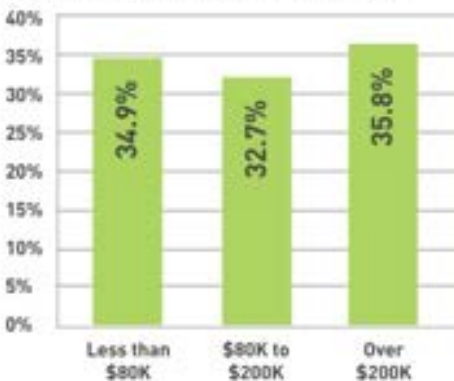
Region of Residence

(% region planning to travel more)



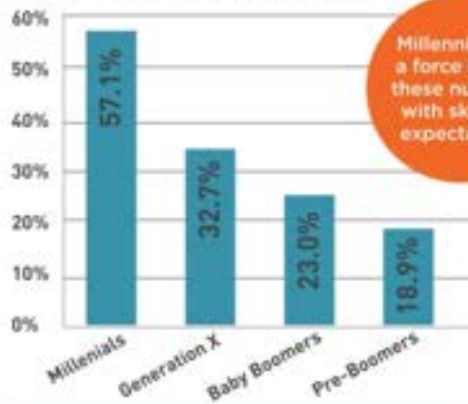
Annual Household Income

(% income planning to travel more)



Generations

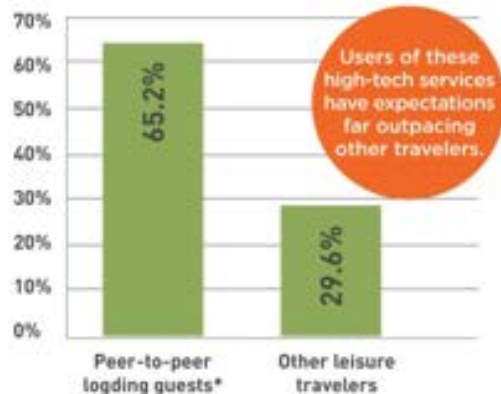
(% age planning to travel more)



Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

Peer-to-Peer Lodging Guests

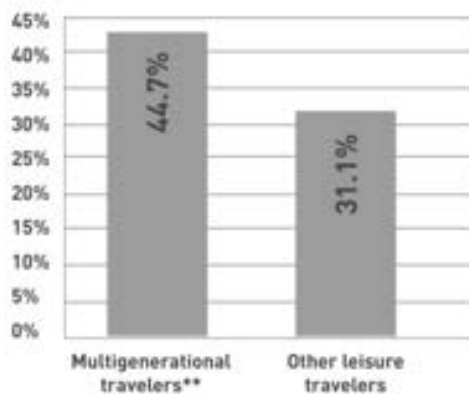
(% planning to travel more, comparison)



*Travelers using a website such as Airbnb, HomeAway or VRBO to book leisure accommodations in past 12 months

Multi-Generational Travelers

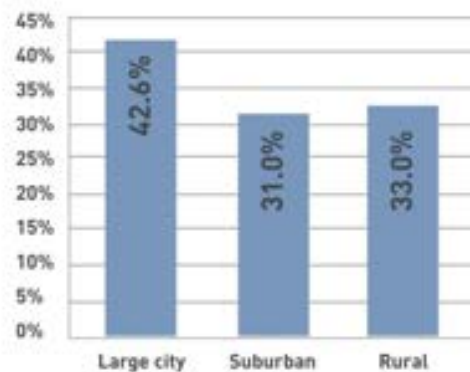
(% planning to travel more, comparison)



**Travelers taking a trip that included at least three generations of travelers in past 12 months.

Place of Residence

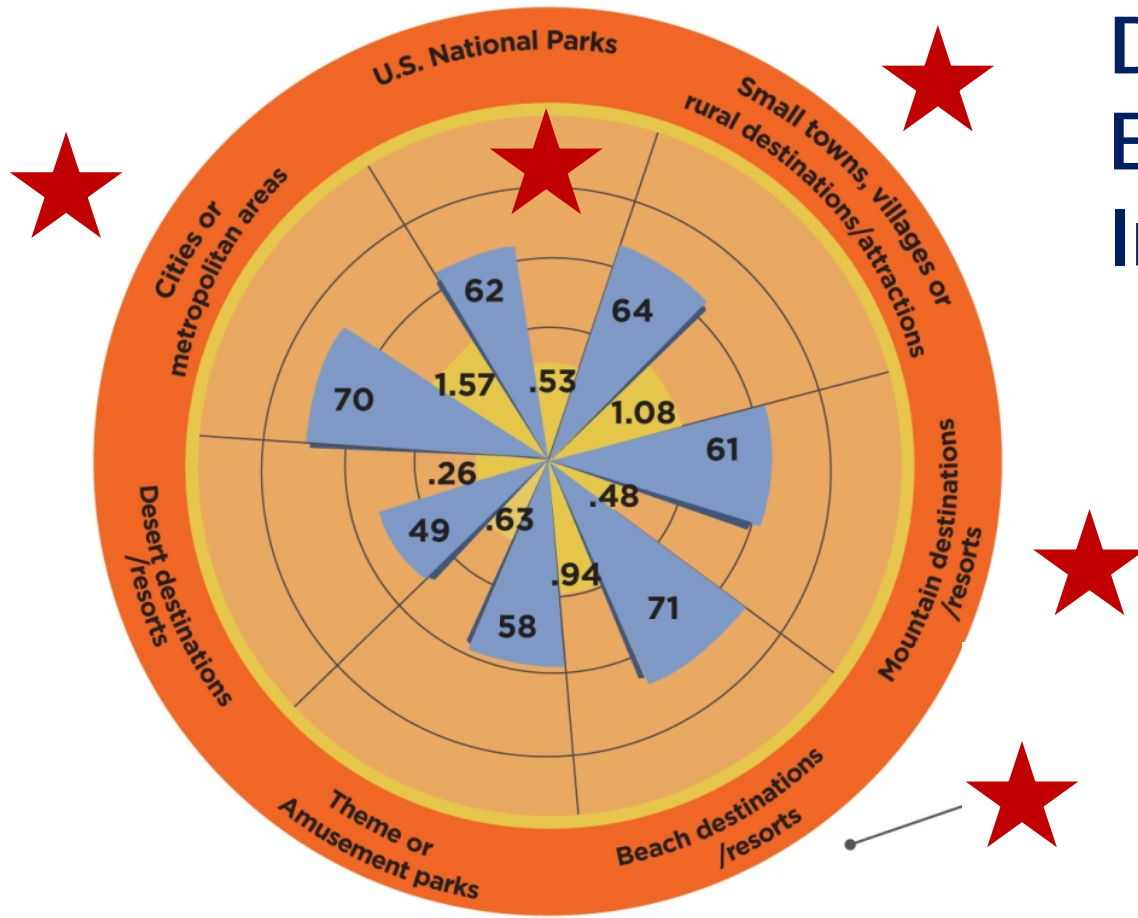
(% planning to travel more, comparison)



The **State** of the
American Traveler

THE STATE OF
U.S. DESTINATIONS
IN 2016

Destination Excitement Index



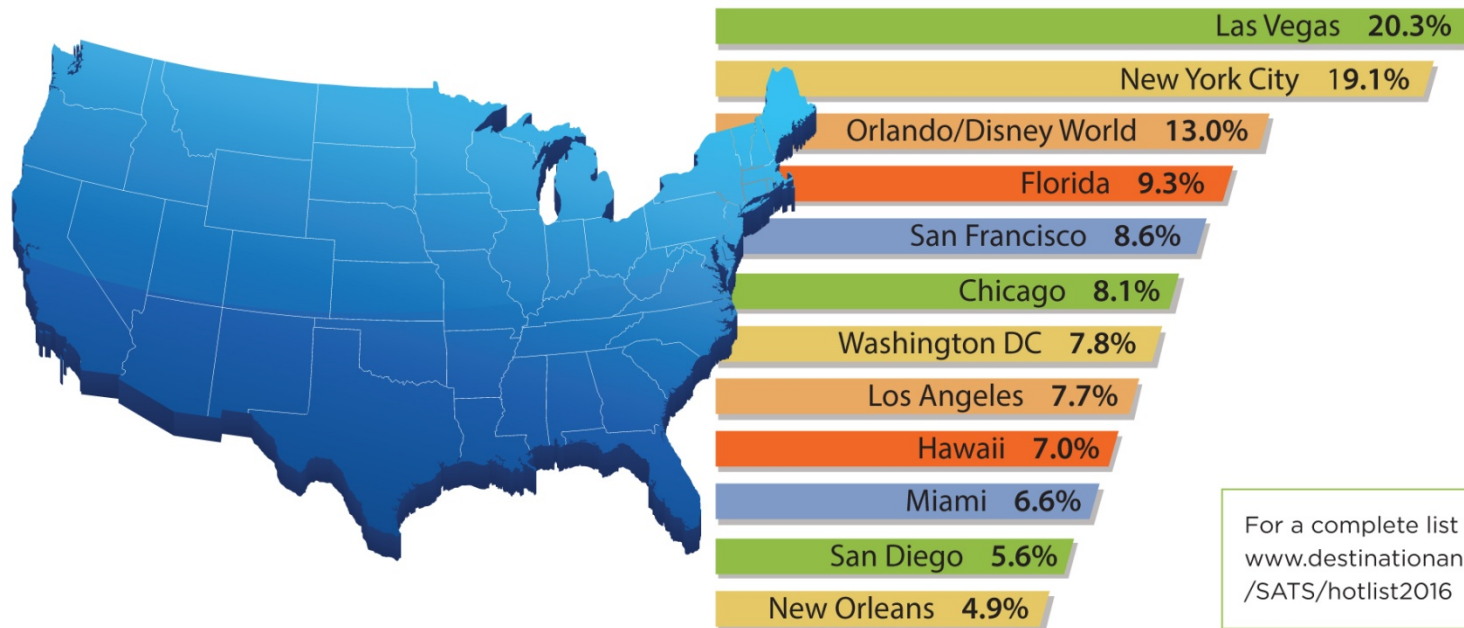
Who is Hot for Which Destination Types?

Millennials are an extraordinary driver of enthusiasm for U.S. destinations, particularly for Mountain, Desert, and Theme Park destinations



Most Desired U.S. Destinations — 2016

What are the five domestic destinations that you would most like to visit in the upcoming year? (OPEN ENDED)



For a complete list visit
[www.destinationanalysts.com
/SATS/hotlist2016](http://www.destinationanalysts.com/SATS/hotlist2016)

WHO is Hot for Which U.S. Destinations?

MILLENNIALS

1. New York
2. Las Vegas
3. Florida
4. Orlando/DisneyWorld
5. Los Angeles

BOOMERS

1. Las Vegas
2. New York
3. Orlando/DisneyWorld
4. San Francisco
5. Washington, DC

The **State** of the
American Traveler

65 Destinations

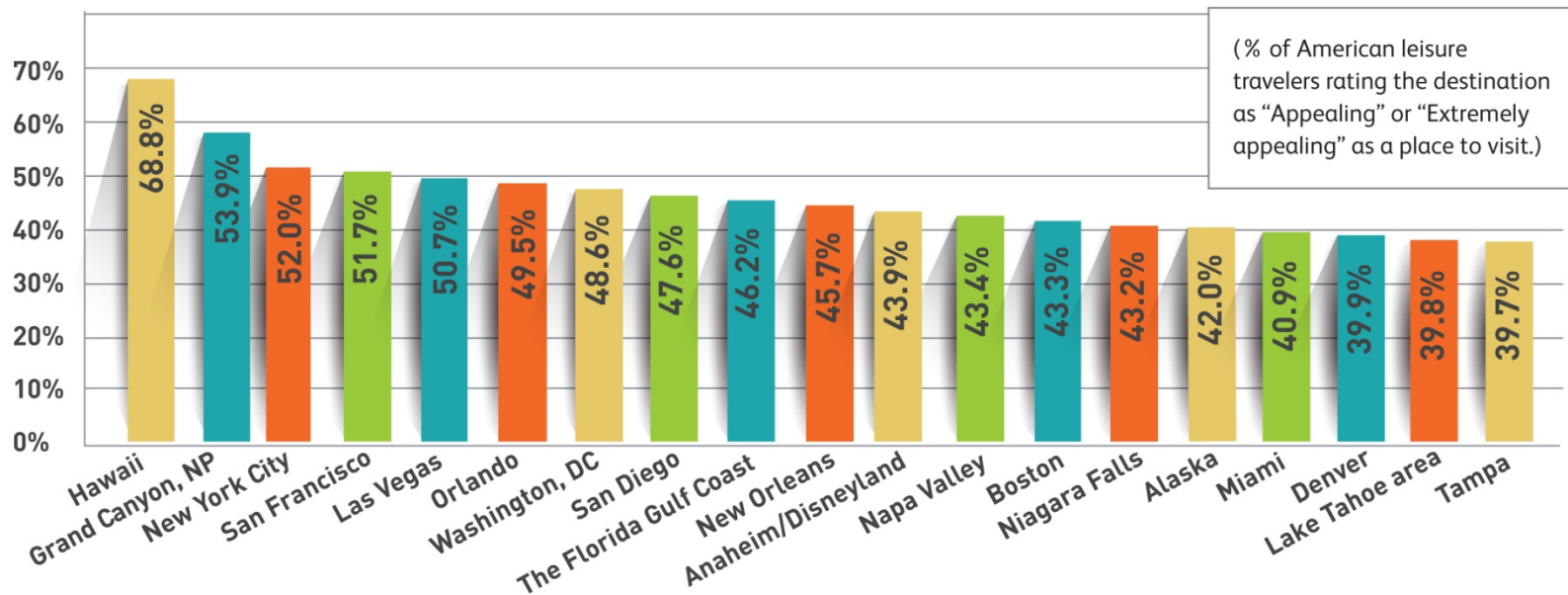
Familiarity

Appeal

Past Visitation

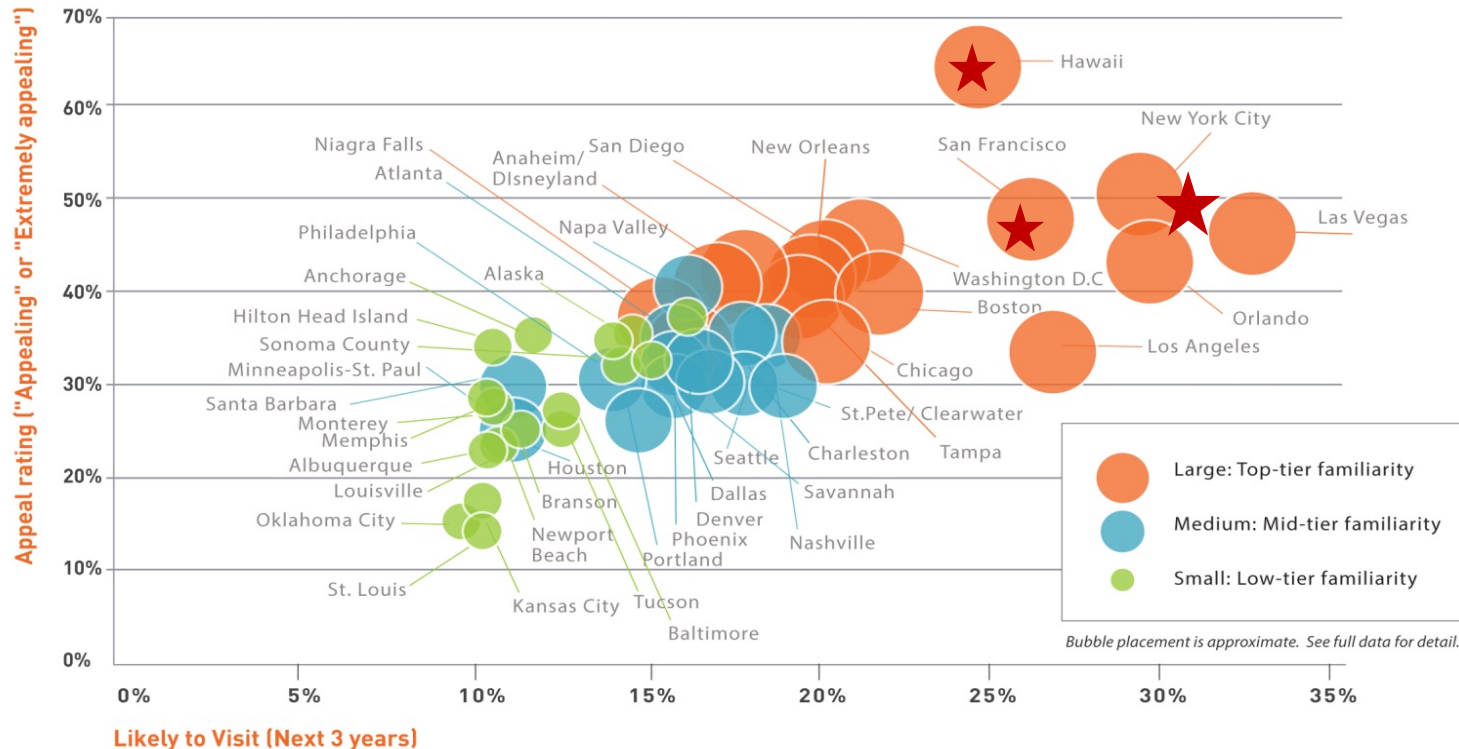
Likelihood to Visit

Most Appealing U.S. Destinations



Appeal Vs. Likelihood of Visiting

www.destinationanalyst.com/SATS/destinationappeal



Best/Most Awards Which U.S. Destination Is...

Most Romantic

MILLENNIALS

Hawaii

New York City

BOOMERS

Hawaii

Niagara Falls





Makes You Feel Most Excited and Alive

MILLENNIALS

Las Vegas

BOOMERS

Las Vegas

Most Popular with People Like You

MILLENNIALS

New York

BOOMERS

Las Vegas

Florida



Most Brag-Worthy Destination

MILLENNIALS

New York

Hawaii

Las Vegas

California

Los Angeles

BOOMERS

Hawaii

Washington DC

New York

Alaska

Grand Canyon



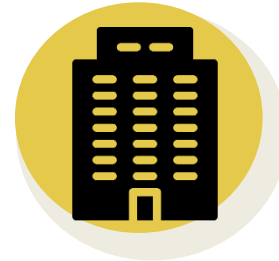
The **State** of the
American Traveler

TRAVEL INSPIRATION & PLANNING BEHAVIORS

What Content is Important in Evaluating Destinations?

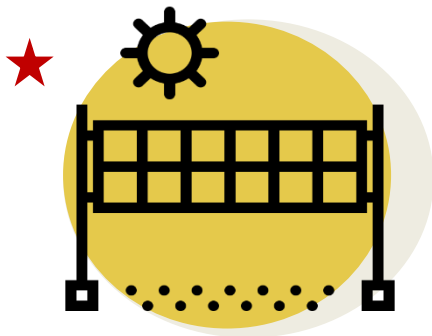


Most Important Content – Cities & Urban Areas





Most Important Content – Beaches



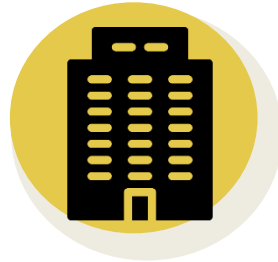


Most Important Content – National/State Parks & Recreation Areas





Most Important Content – Mountain



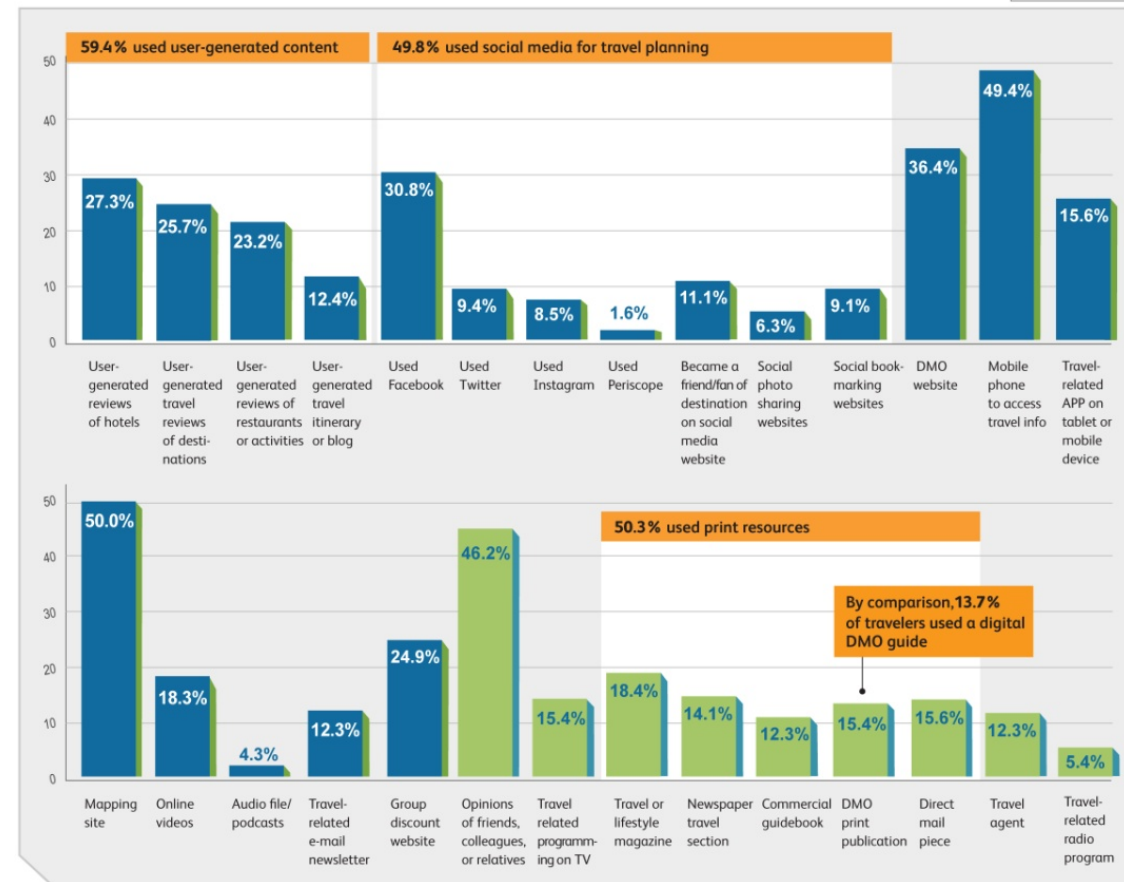
How Are Americans Planning Travel?

Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

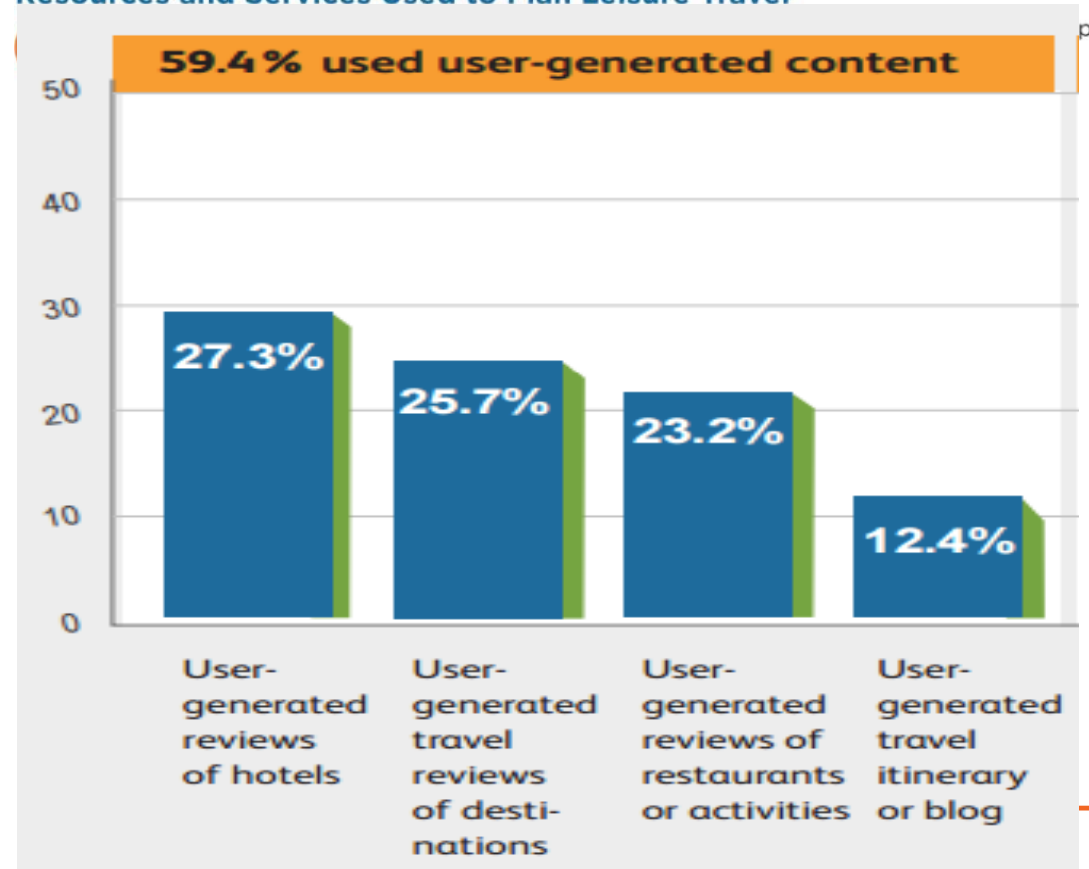
Q In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)

● ONLINE
● OFFLINE



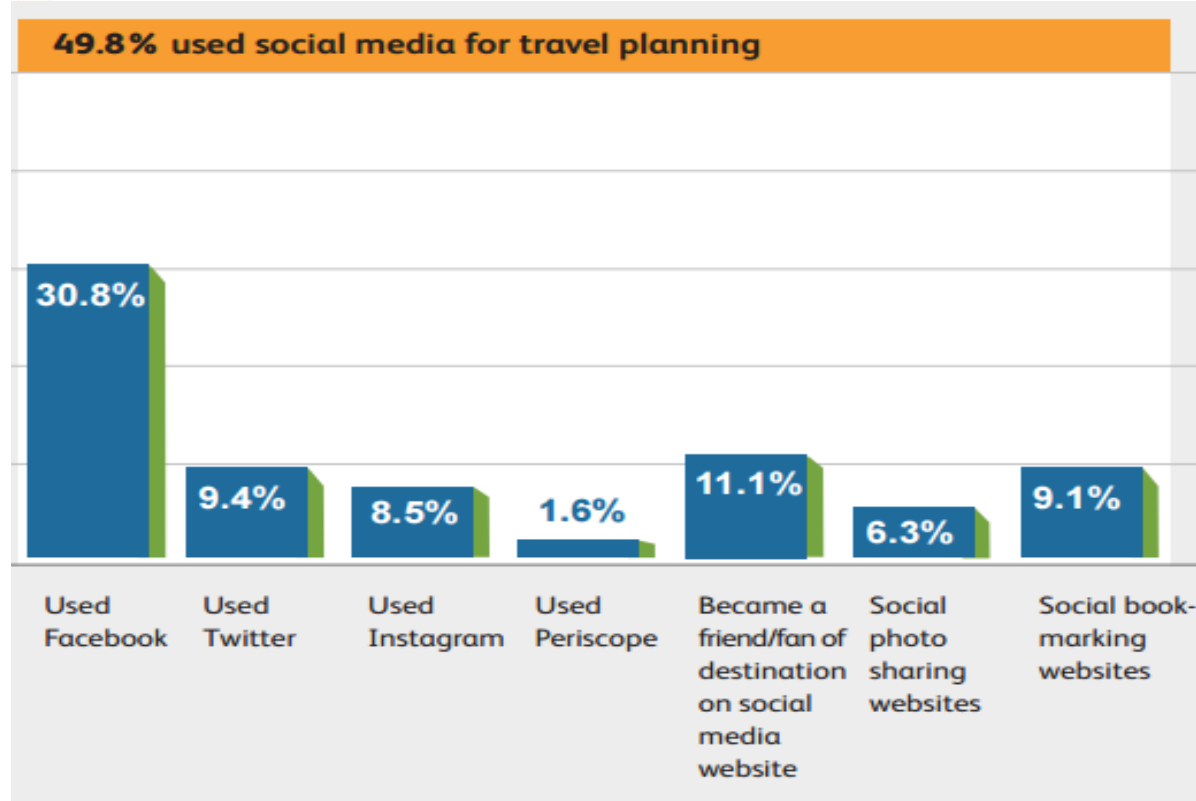
Travel Media & Technology

Resources and Services Used to Plan Leisure Travel



Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

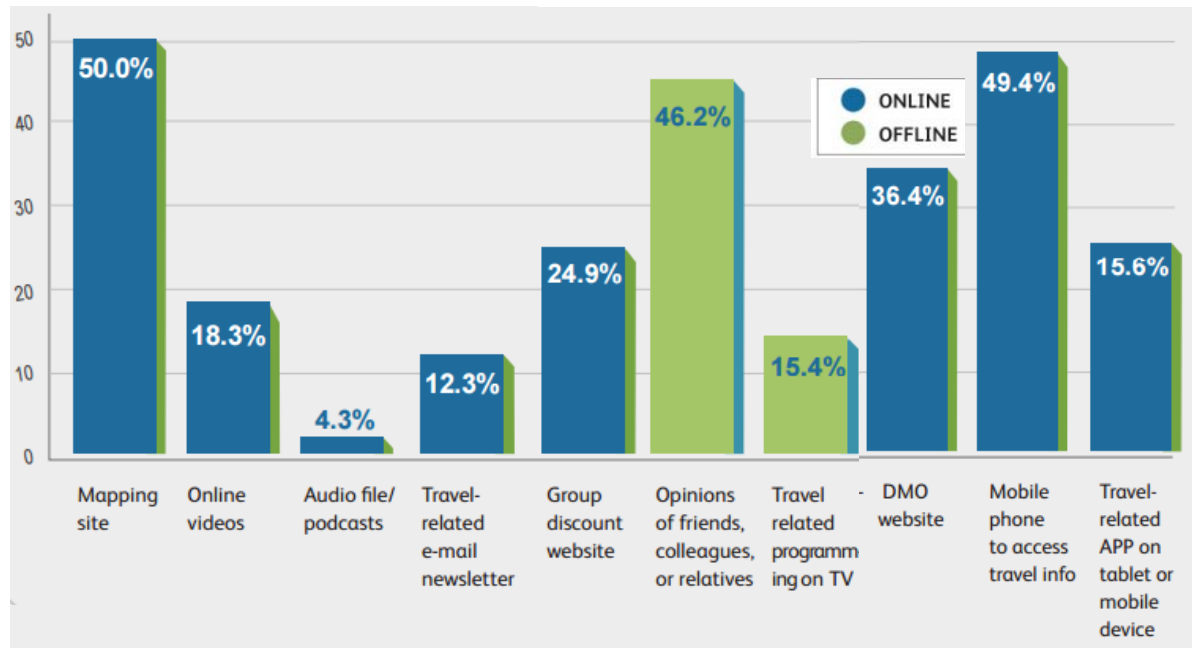


Social Media
Prevalent in
Multiple Stages
of Travel

Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

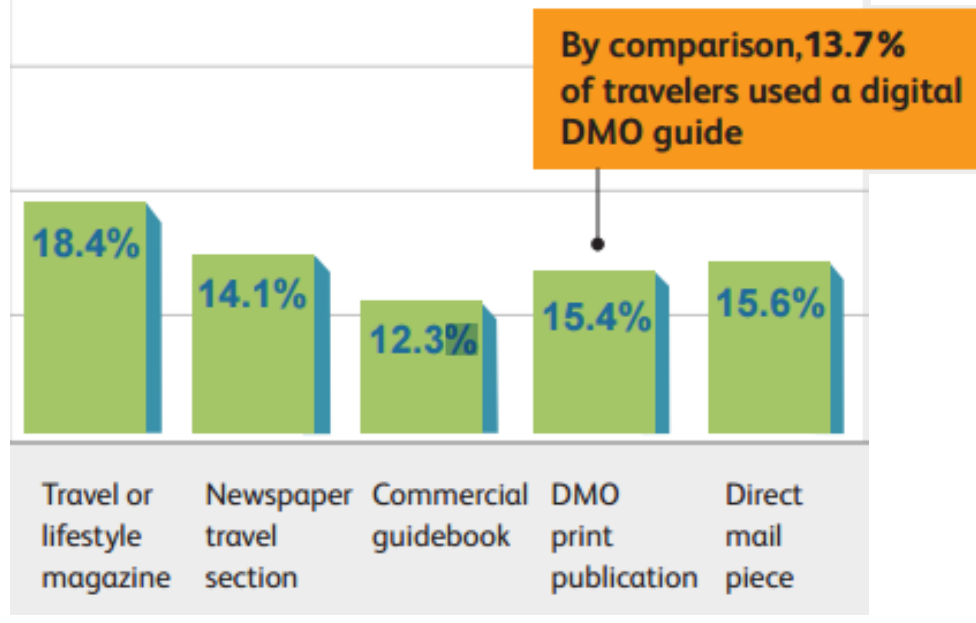
Q In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)



Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

50.3% used print resources



Travelers Like Print

DMO Website Use in Travel Planning

Q

Q: In the past 12 months, have you used the official WEBSITE of a destination's local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?

YES	36.4%
NO	58.5%
I Don't Know	5.1%

Q

Q: At which point in your travel planning did you use the website of a destination's visitors or convention bureau (or chamber of commerce) or state or national government travel office? (Select all that apply)

Before I had decided to travel to the destination	67.6%
After I decided to travel to the destination	44.4%
While I was in the destination on my trip	15.4%

The **State** of the
American Traveler

**THE PEER-TO-PEER
LODGING USER**

Airbnb removes New York igloo charging \$200 a night

But snow house was 'very well constructed'

By **Rich McCormick** on January 26, 2016 03:49 am [Email](#)



[Share on Facebook](#) (6,393)

[Tweet](#)

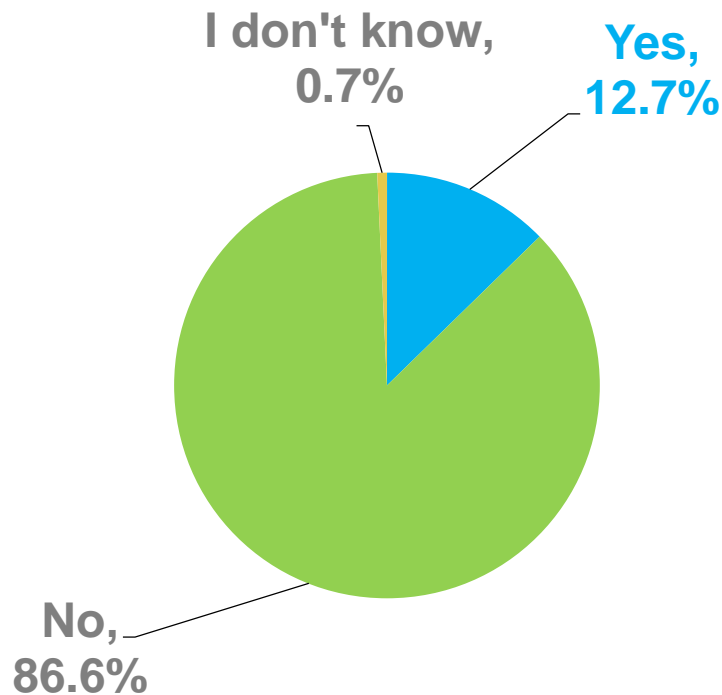
[Share](#) (118)

[Pin](#)

In the past 12 months,
have you used any
PEER-TO-PEER LODGING
WEBSITE (e.g., AirBnB,
VRBO, etc.) to book
any leisure
accommodations?

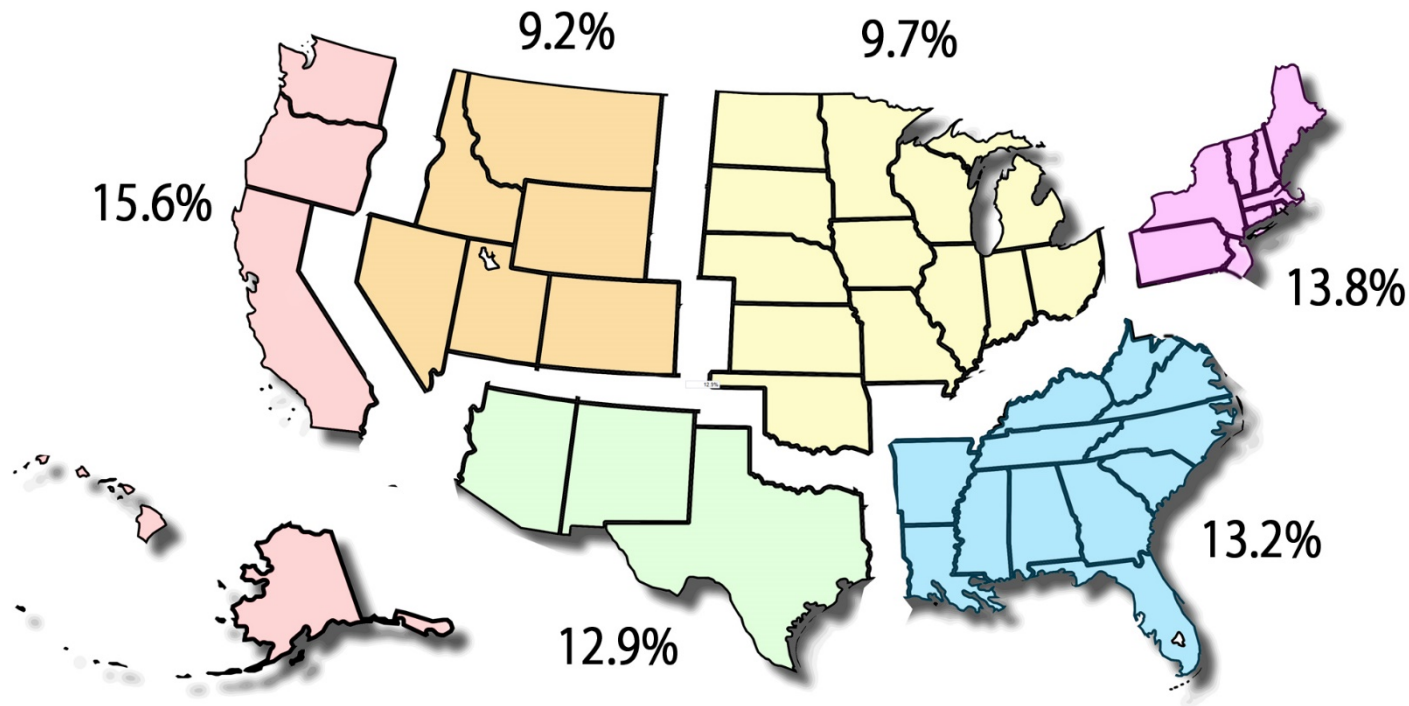


Use of Peer-to-Peer Lodging (past 12 months)



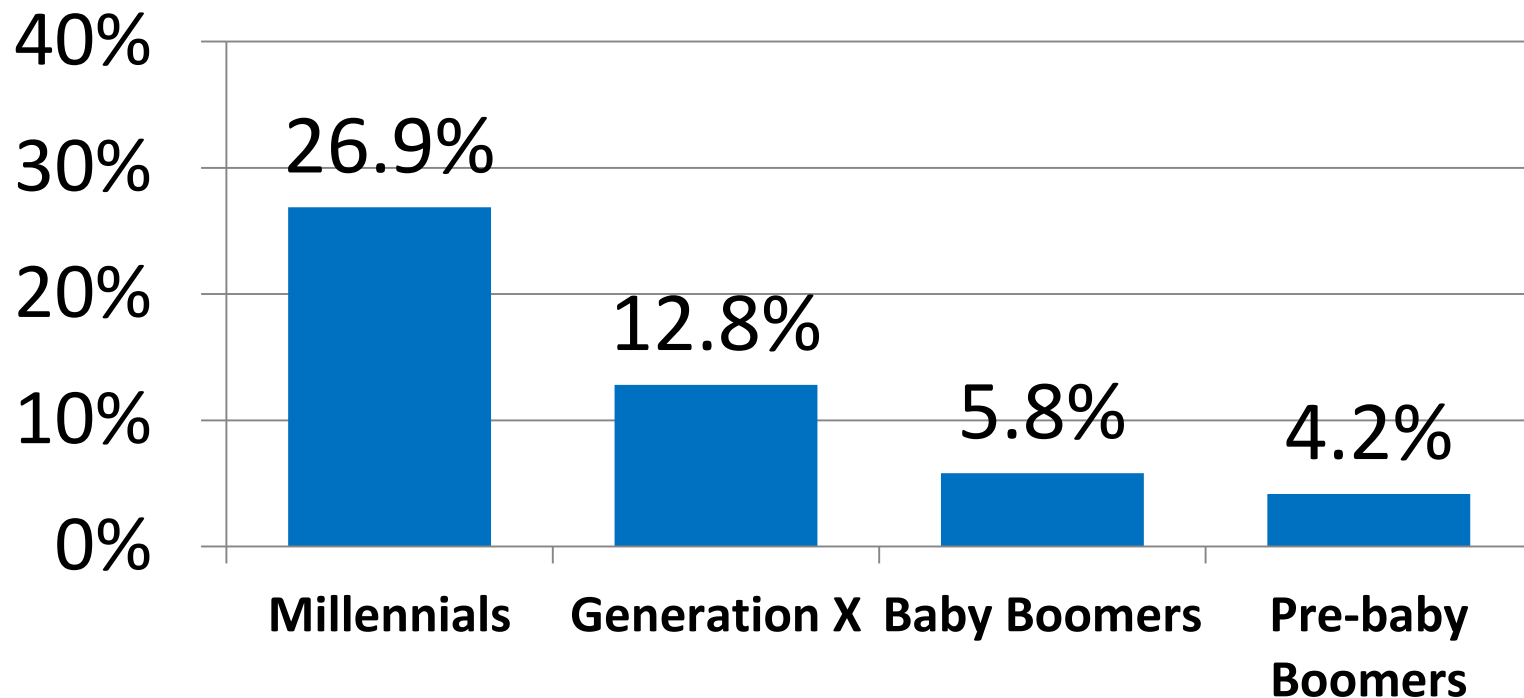
Percent of American Leisure Travelers

Use of Peer-to-Peer Lodging (past 12 months)



Percent of Leisure Travelers Using Peer-to-Peer lodging, by Region

Use of Peer-to-Peer Lodging (past 12 months)

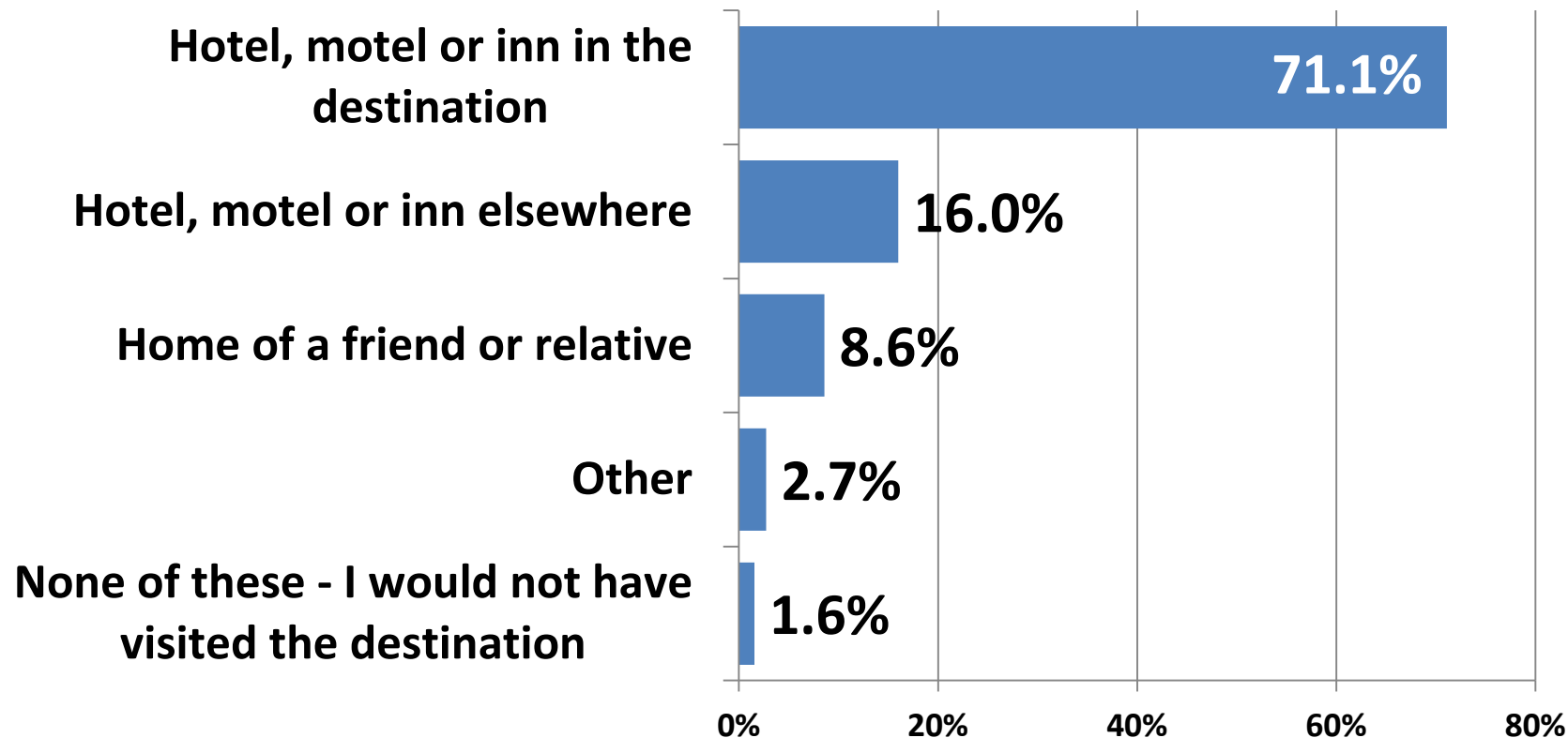


Please think about the MOST RECENT DESTINATION where you stayed in a peer-to-peer lodging property .

Now imagine that this peer-to-peer lodging was not available in the destination. In this case, where would you have most likely stayed?



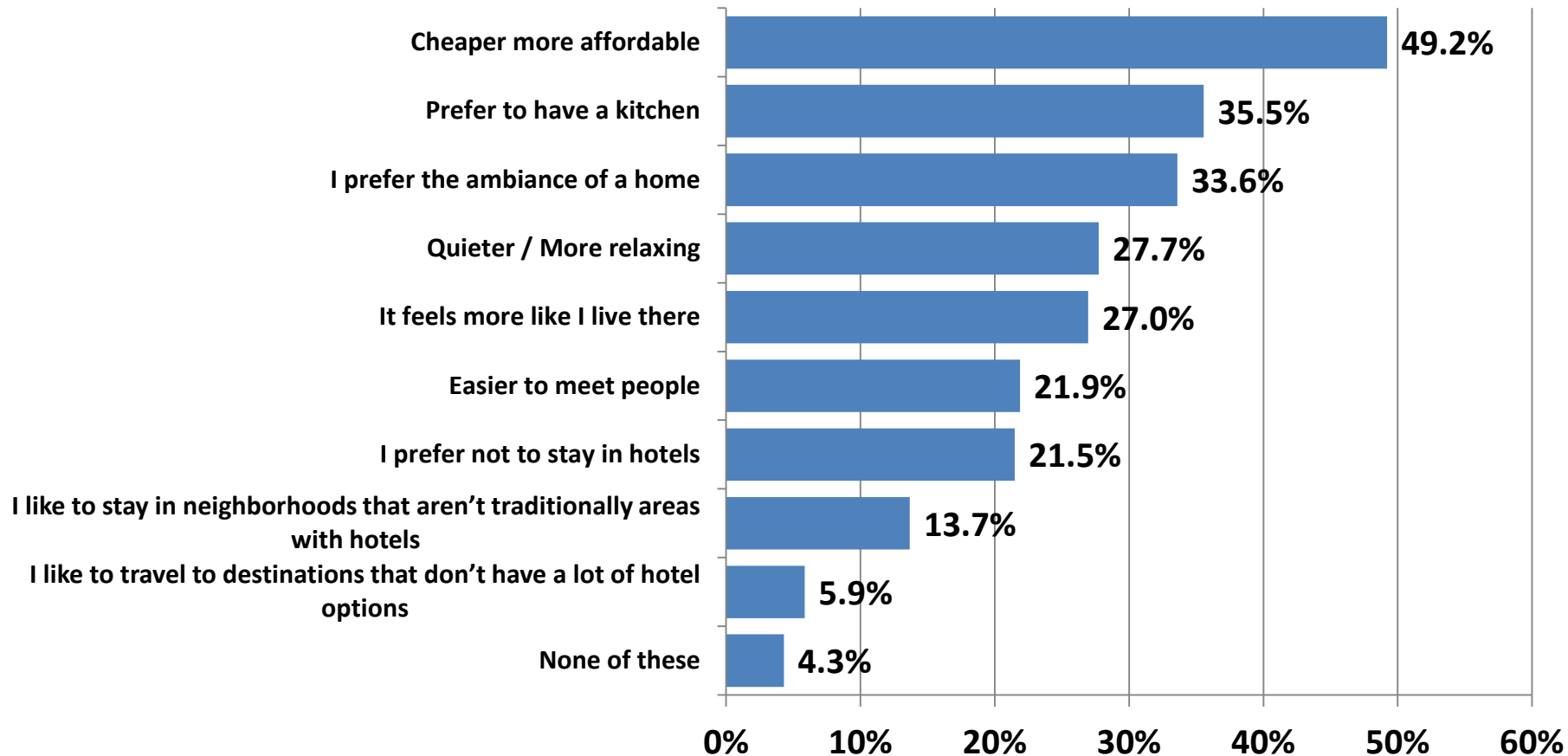
Why Use Peer-to-Peer Lodging?



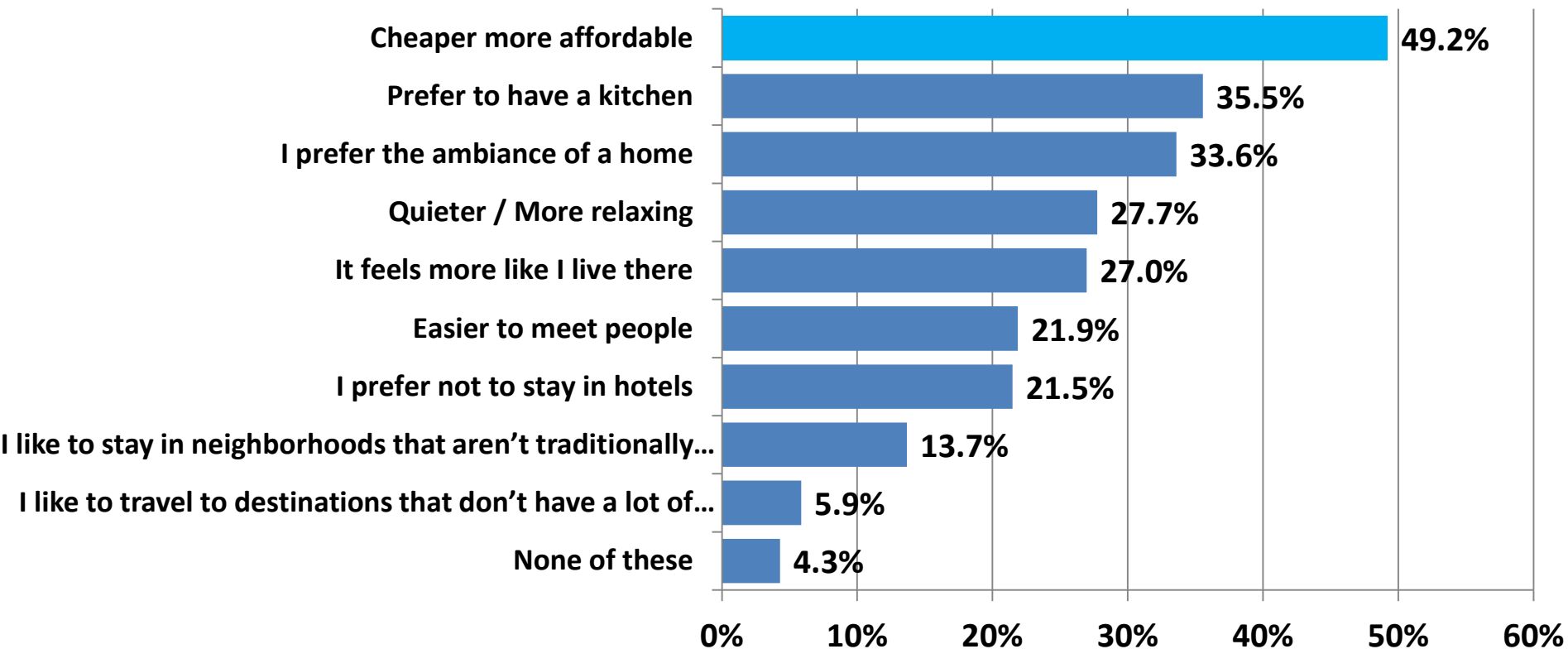


Why do you
use peer-to-
peer lodging
properties?

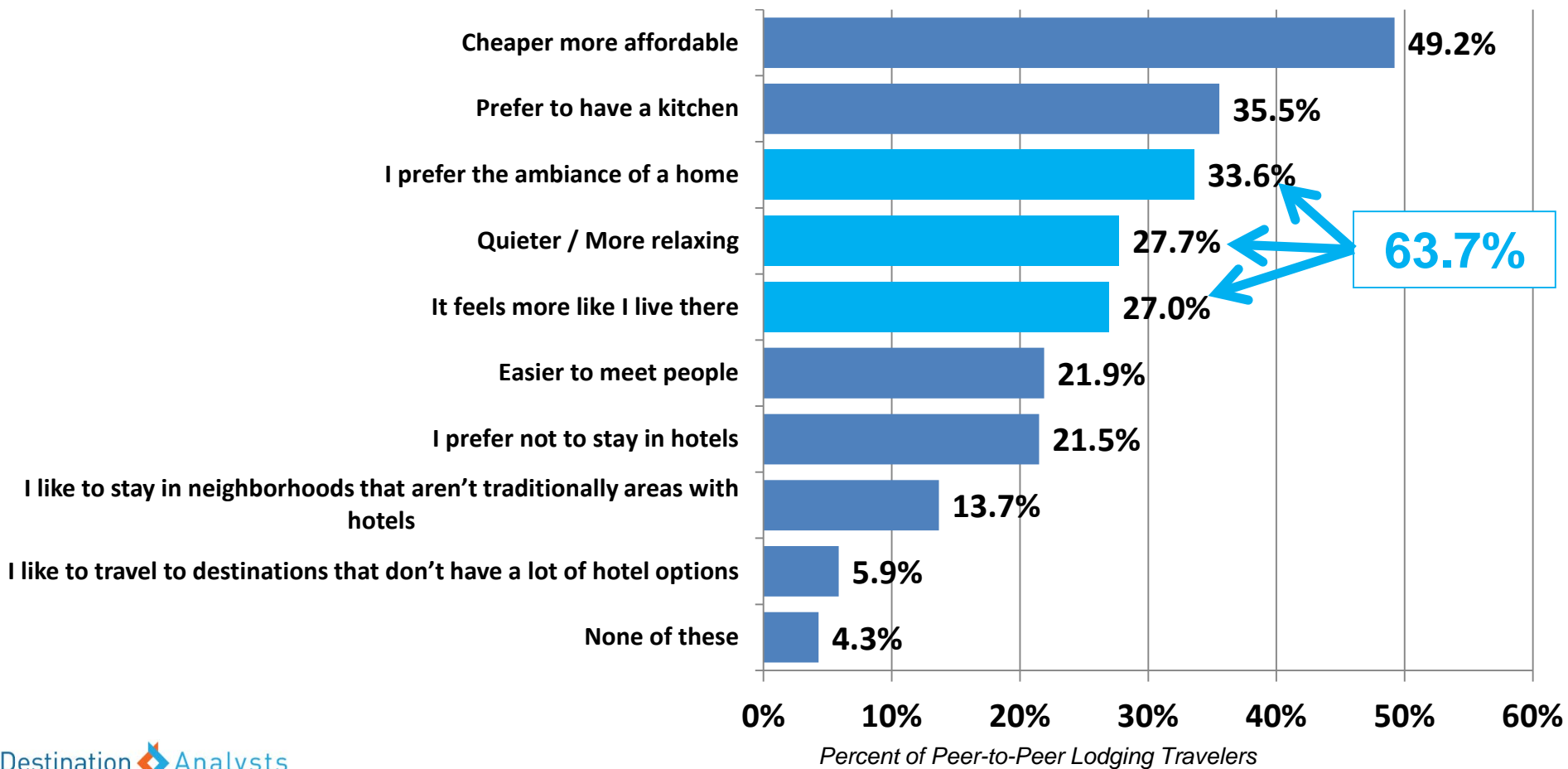
Why Use Peer-to-Peer Lodging?



Why Use Peer-to-Peer Lodging?



Why Use Peer-to-Peer Lodging?



Experience

Costs





#3 Summary & Key Takeaways



3 x Takeaways

1. Cloudy Outlook: Marketing in Uncertainty
2. Focus on the Positive Travelers
3. Aspiration to Action – Story Telling



1: Cloudy Outlook

Marketing in a Mixed Economy & World

Travel Outlook: **Sunny**





Chris Adams
Director of
Research and
Online Marketing

research >

trends >

Some Clouds in Tourism's Sunny Outlook

A sharp slowdown in international economic growth presents challenges for tourism marketers



The recent article in the *New York Times*, “A Global Chill in Commodity Demand Hits America's Heartland” tells the story.

This highlights the impact in 2015, and into 2016, of slowing international economic growth on tourism in the US and around the world. Indeed, some destinations in the heart of the

US and in other commodity-driven economies such as Canada, Australia and New Zealand, are already confronting a slowing economy, driven by lower Chinese demand for everything from iron ore to corn, plus sharply declining commodity prices.

While some economies such as the US, UK and Germany remain reasonably strong – and across the US, travel and tourism's outlook in domestic travel is amongst the robust in the last decade, the picture is increasingly mixed. In short, a two-speed economy is emerging, with countries like Brazil

MAKING SENSE

Column: Why sunny views of the economy are misguided



JOHN
KOMLOS

BY JOHN KOMLOS *February 29, 2016 at 1:09 PM EST*



331



EMAIL



Key Currencies vs. The U.S. Dollar

% Change from January 2013



1. Takeaways: Cloudy Outlook

1. Review Your Marketing Programs Based on Outlook & Results
2. Don't Take your Eye off International Opportunities
3. Greater Focus on Calls to Action & in some markets: Value
4. Expand Reporting to Government on role of Tourism in Economy



2: Focus on the Positives

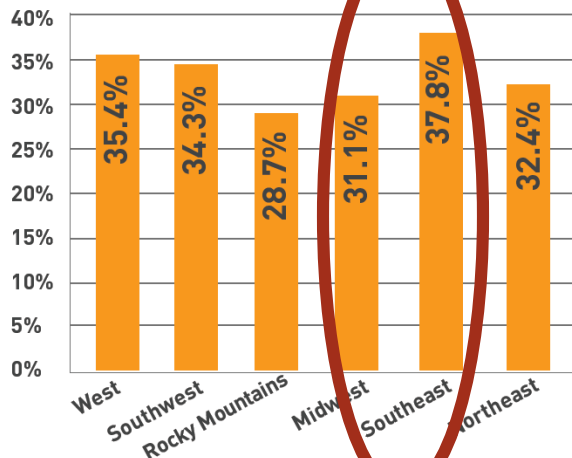
Marketing Markets of Opportunity

Markets of Opportunity

Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

Region of Residence

(% region planning to travel more)



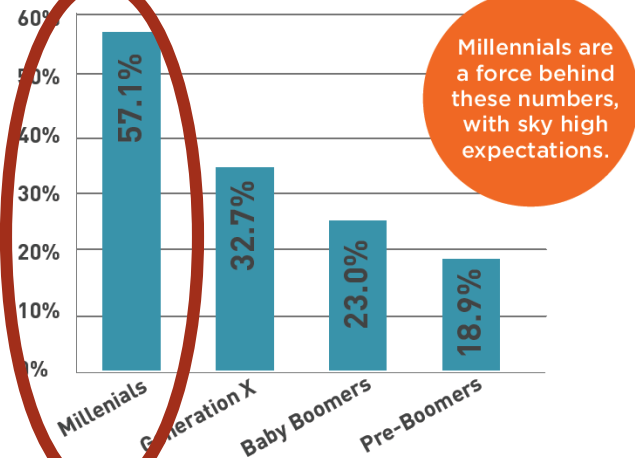
Annual Household Income

(% income planning to travel more)



Generations

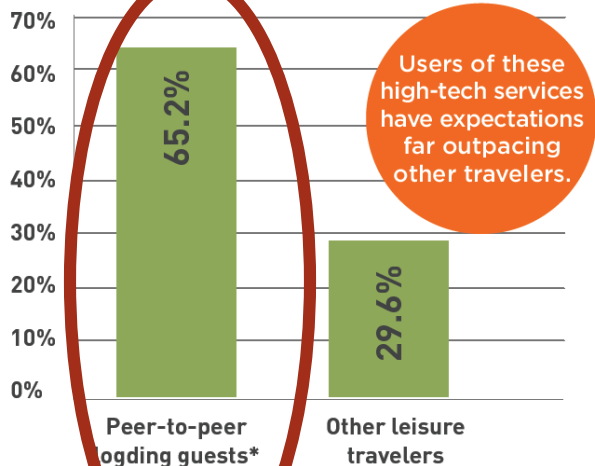
(% age planning to travel more)



Markets of Opportunity

Peer-to-Peer Lodging Guests

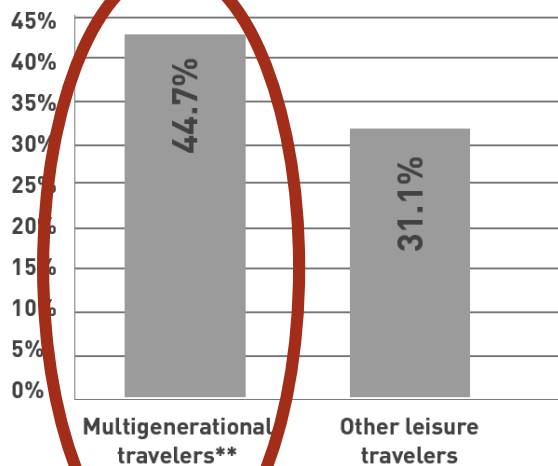
(% planning to travel more, comparison)



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Multi-Generational Travelers

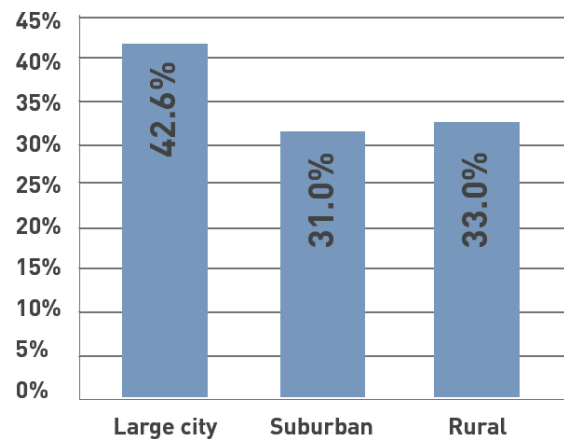
(% planning to travel more, comparison)



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Place of Residence

(% planning to travel more, comparison)



BISHA HOTEL & RESIDENCES



Skift Podcast 6: The Rise of Lifestyle Hotels and the Culture Driving Them

Samantha Shankman, Skift - Jul 09, 2015 8:00 am

[@jclampet](#)



Getting Ancillary Sales Right

Understanding How to Optimize

SPONSORED Purchase

Selling the Extras: How Travel Brands Can Get Ancillary Sales Right



Ancillary sales are an important factor in enhancing the travel customer's experience. Learn how to get ancillary sales right by downloading Fusion's free report.

Follow Fusion: [in](#)

[Read More](#)

2. Takeaways: Market Opportunity

1. Engage with Millennials – right reach & messaging
2. Engage with, & learn from, expanding “Lifestyle Hotel” sector
3. Expand your ‘Togetherring’ Offerings & Marketing
4. How do you engage with, & market, Sharing Economy Offerings?



3: Aspiration to Action

Highlighting Your Destination

The hyper informed traveler: 2016



49%
50%

**Use Print Publications:
Visitor Guides,
Brochures, Magazines**

This percentage has actually increased since 2007



40%
50%

**Use Social Media in
Trip Planning**

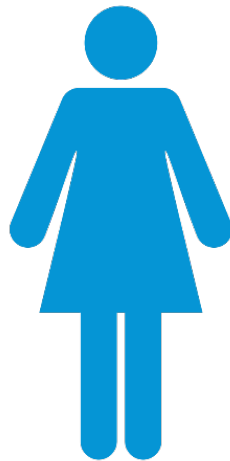
*Most travelers use social media
to see or share trip photos;
encourage your guests to
share their experience through
services like free Wi-Fi*



41%
59%

**Seek Out Reviews, Ratings and User-Generated Content for
Ideas and to Validate Their Selection**

*Recent research from Cornell's School of Hospitality (2014) highlights that properties
with better reviews are able to command a higher ADR – against properties of
similar location and facilities*



60%

**of Travel Decision
Makers Are Female**



15%

**Use Official Visitor Guides:
City, Regional or State
Vacation Publications**

From a CVB or other DMO

31%
36%

**Use Official Destination
Websites**

From a CVB or other DMO



28%
36%

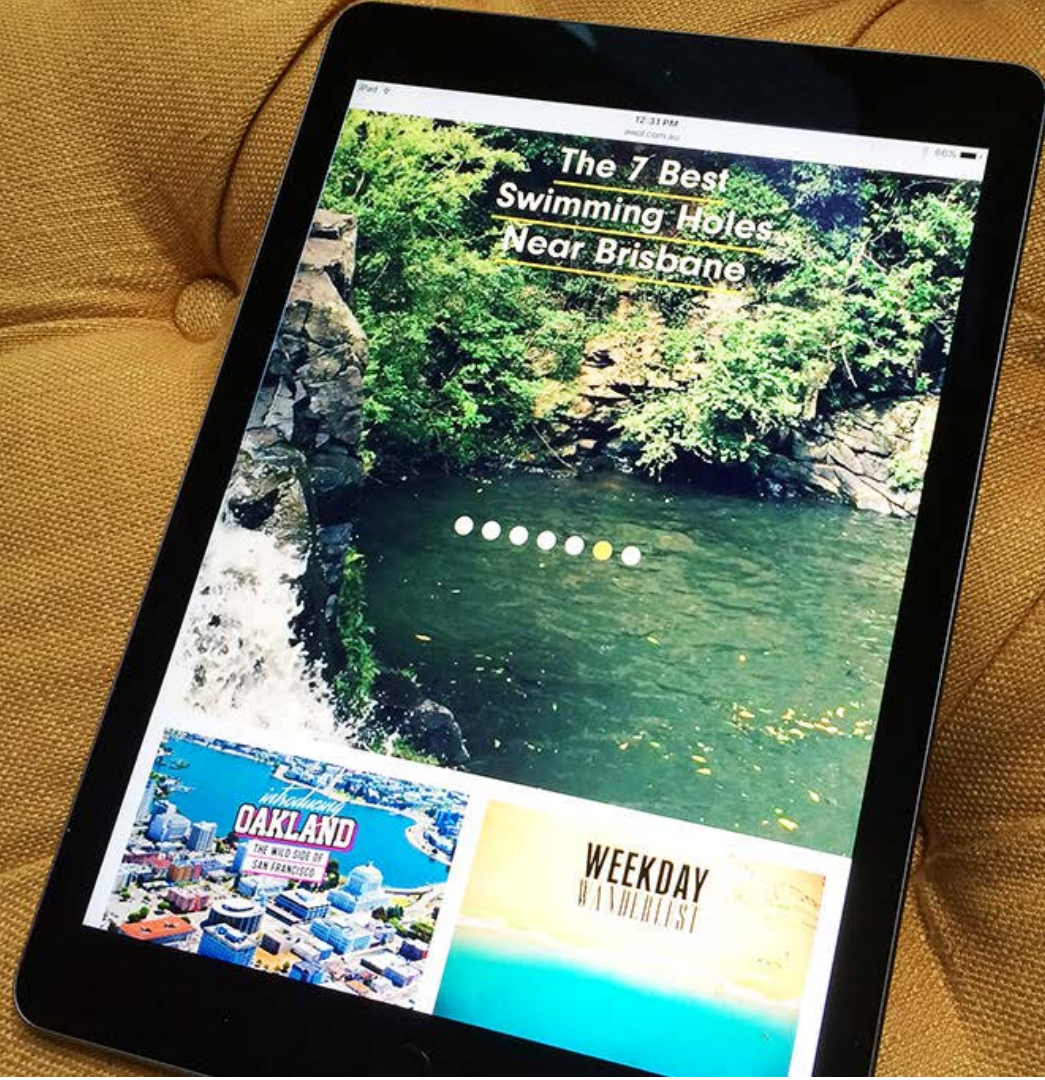
**Use Tablets To Access
Travel Information***

**Travelers use them almost equally both
before and during travel*



41%
49%

**Use Smartphones To
Access Travel Information***





Reasons to travel | JAN 2016

Mysterious underwater museum:

Deep-sea sculptures

START READING
IFLY MAGAZINE

MORE MAGAZINE HIGHLIGHTS



➔ Carnival in Venice



➔ Explore Route 62



➔ Ski resorts in Asia



➔ Would you rather...



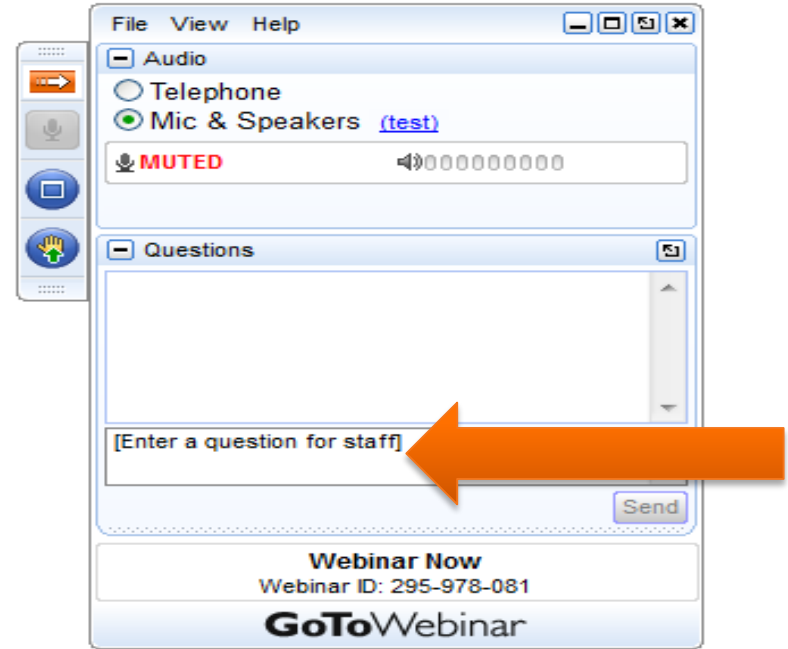
➔ Feast of flowers at Keukenhof

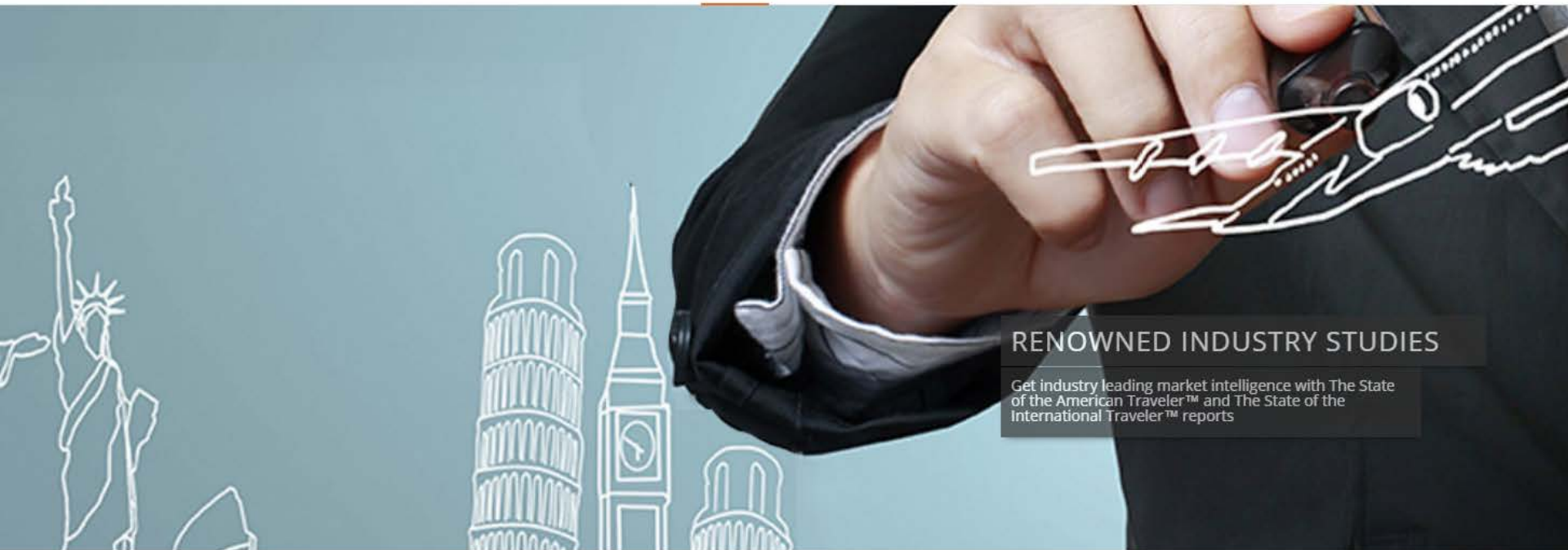
3. Takeaways: Aspiration to Action

1. Digital Magazine highlight rich, immersive story telling
2. Invest in content for every stage of the trip planning process
3. Hyper Informed Travelers in 'Hyper Drive'
4. Mobile First to Situation First

QUESTIONS – COMMENTS?

USE THE
QUESTION BOX





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Chris Adams
Director of
Research and
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Published 3/8/16

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2016 State of the American Traveler: Destinations Edition

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Appeal & Action – Targeting Opportunities in 2016

research >

The State of the American Traveler from our good friends at Destination Analysts is one of the industry's leading research reports into the outlook, media use and interests of US leisure travelers. Miles is a longtime sponsor and, in 2016, is excited to be part of increasing the research to a quarterly reporting cycle.

The first State of the American Traveler for 2016 presents a mixed but also exciting picture of the opportunities for travel marketers in 2016. From its new, expanded look at Destinations, plus its usual tracking of US leisure travelers' intentions in the year ahead, media use in trip planning and travel behavior, we have highlighted three areas of particular interest and 10 specific takeaways:

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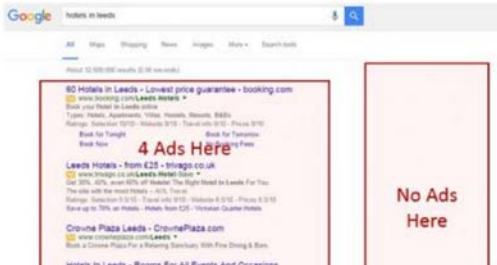
Kim Palmer
Director of SEO & Insights

Published 2/29/16

Google's New SERP Layout: How It Affects Paid Search

A Timely Update on Google Ad Layout Changes

Google recently completed the full rollout of a new search engine results desktop. This update eliminated text ads in the right sidebar of desktop many as four text ads will display above the organic listings (depending query), and three text ads will show at the bottom of the page. This means that of text ads that can appear on a SERP will shrink from as many as 11 to 4.



Meet Miles What We Do How We Think Join Us



Chris Adams
Director of Research and Online Marketing

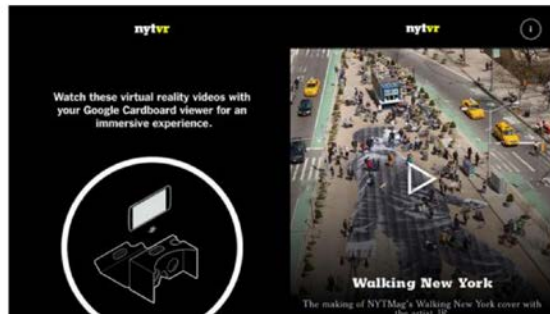
Virtual Reality Moves Towards the Mainstream

Is it virtual reality's "big moment?" Is VR finally moving from early adopters towards mainstream consumer use? In early November 2015, the *New York Times* launched a major virtual reality storytelling initiative in partnership with Google – including mailing 1.3 million Google Cardboard headsets to its subscribers in the US.

The *New York Times*' first major VR story, *The Displaced*, plots the journey of three refugees from around the world seeking a new life. The VR experience allows viewers to follow the journey with the ability to look around the locations as a 360-degree immersive experience. That same weekend the *New York Times Magazine* also launched a VR experience, *Walking New York*. Both are available as a traditional online story (editorial, images, maps) and also as a VR experience.

technology >

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Options for Destination
Marketing Organizations

Overview

- Online Booking for
- Types of Online Booking
- Analysis of Online Booking Performance for DMOs

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content that travels

Content Marketing Best Practices

Overview

- The 8 Essentials of Successful Content Marketing
- Content Distribution with the Hyper-Informed Traveler
- Top Tips for Content that Travels Well
- The Three Broad Channels of Content Marketing & Distribution

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Thank You



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