

UPCOMING WEBINAR:

Update on US Leisure Travel

Latest Research on Mobile Use & Behavior

Use of Mobile in Trip Planning Process

Global DMO Mobile Readiness Index Ryerson University

Spotlight:

5 Best Practices for 'Next Generation' Mobile

November 10th. 2016

Destination  Analysts

miles
PARTNERSHIP

MOBILE EDITION

STATE OF AMERICAN TRAVELER

Miles & Destination Analysts. November 10TH 2016

Greetings



Chris Adams

+1 303 842 3394

Chris.Adams@MilesPartnership.com
Social: KiwiColorado



Erin Francis - Cummings

+1 415 716 7983

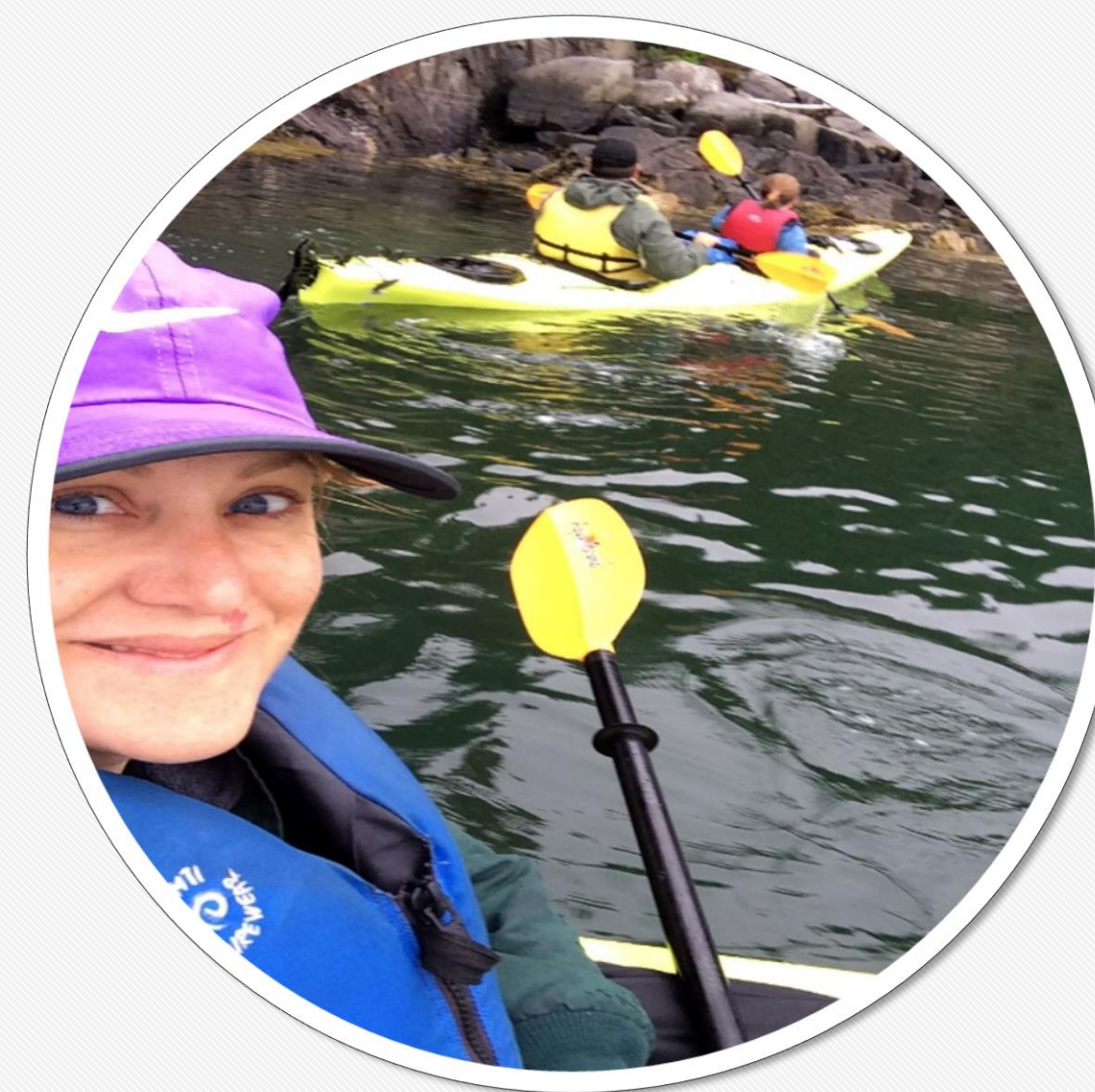
Erin@DestinationAnalysts.com
Social: erincummings31

Miles Presenters



Lara Ortiz,
Snr Interactive Producer, Miles
+1 904 563 1953

Lara.Ortiz@MilesPartnership.com, Social: @MeetMiles



Kim Palmer
Director of Insight & SEO
+1 941 342 2312

Kim.Palmer@MilesPartnership.com

Guest Presenter

TED
ROGERS
SCHOOL OF RYERSON
MANAGEMENT UNIVERSITY



Chris Gibbs

Asso. Professor, Ryerson University

+1 416 576 2483

cgibbs@ryerson.ca



Destination  Analysts

miles
PARTNERSHIP

In Association with





DMA West Tech Summit & Vendor Showcase

March 15-17, 2017 | Sheraton Salt Lake City Hotel, Salt Lake City, UT

Labs | General Sessions | Workshops | Exhibits

Technology Strategies for Destination Marketing Organizations

Creative and energizing, the **DMA West Tech Summit** provides technology strategies and solutions to benefit your staff and your organization.

Join destination marketers in Salt Lake City for hands-on labs, dynamic keynote presentations, informative workshops and a vendor showcase of technology products and services.

Tech Summit online registration will open in late January at www.dmawest.org.

Are You Tourism Ready? Spring Symposium & Marketing College



*Knoxville, Tennessee
March 27-29, 2017*

- *The Great Debates
Decision Marketing*
- *Cutting Edge Research
Hosted Presentations*
- *Power of Research
Round Table*
- *Peer – Peer
Sessions*
- *Class of 2016 Marketing College Graduation*

*Dahlonega, Georgia
May 14 - 19, 2017*



MORE INFORMATION WWW.SoutheastTourism.org

How to participate in today's webinar

Grab Tab (open or close the control panel)

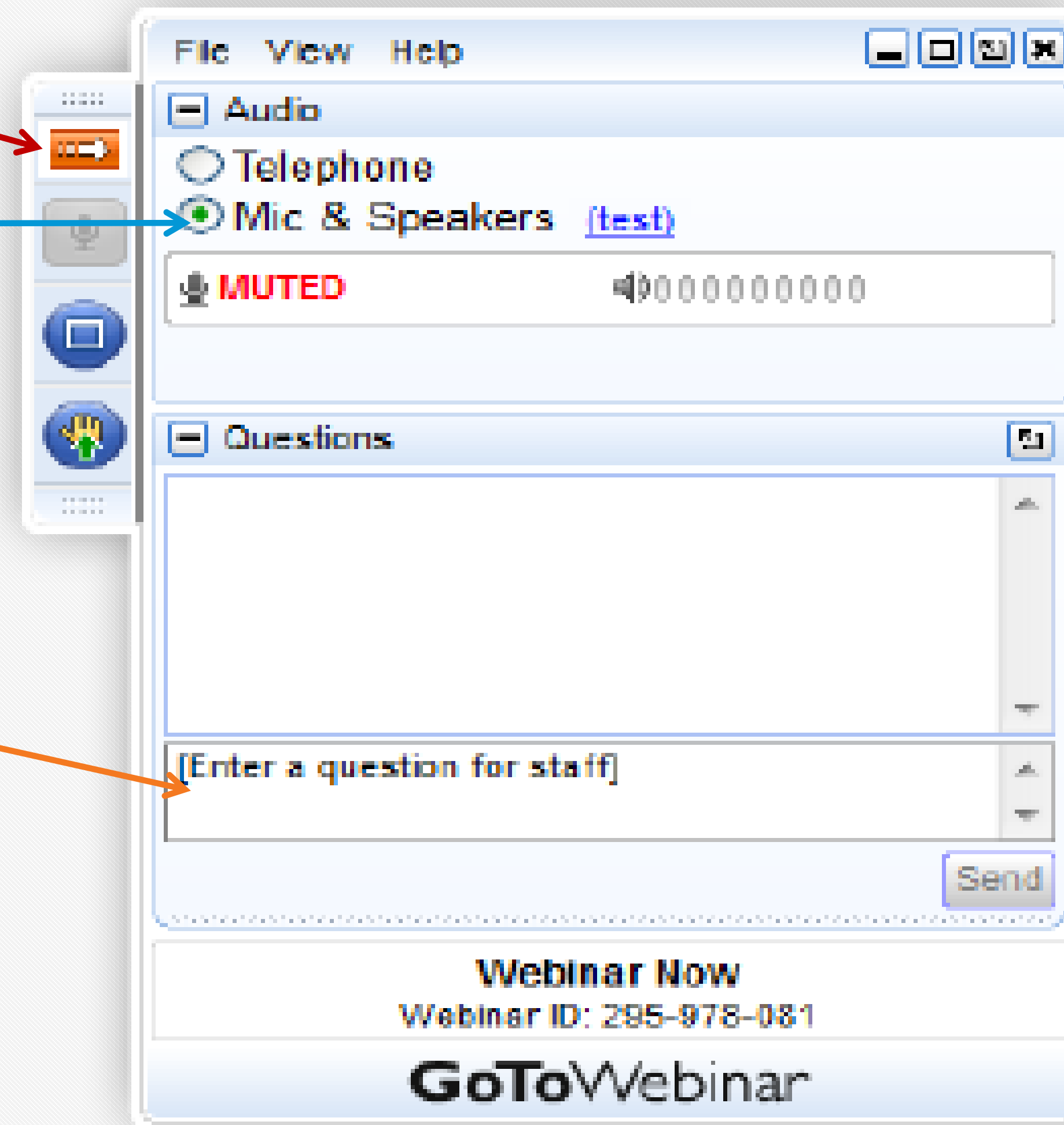
Choose your audio

Use Text Box to ask questions

In case of “Drop-Off”, use your Link to rejoin the webinar

A Question & Answer Session will be held at the end of today's session

Today's webinar is being recorded and will be made available for later viewing

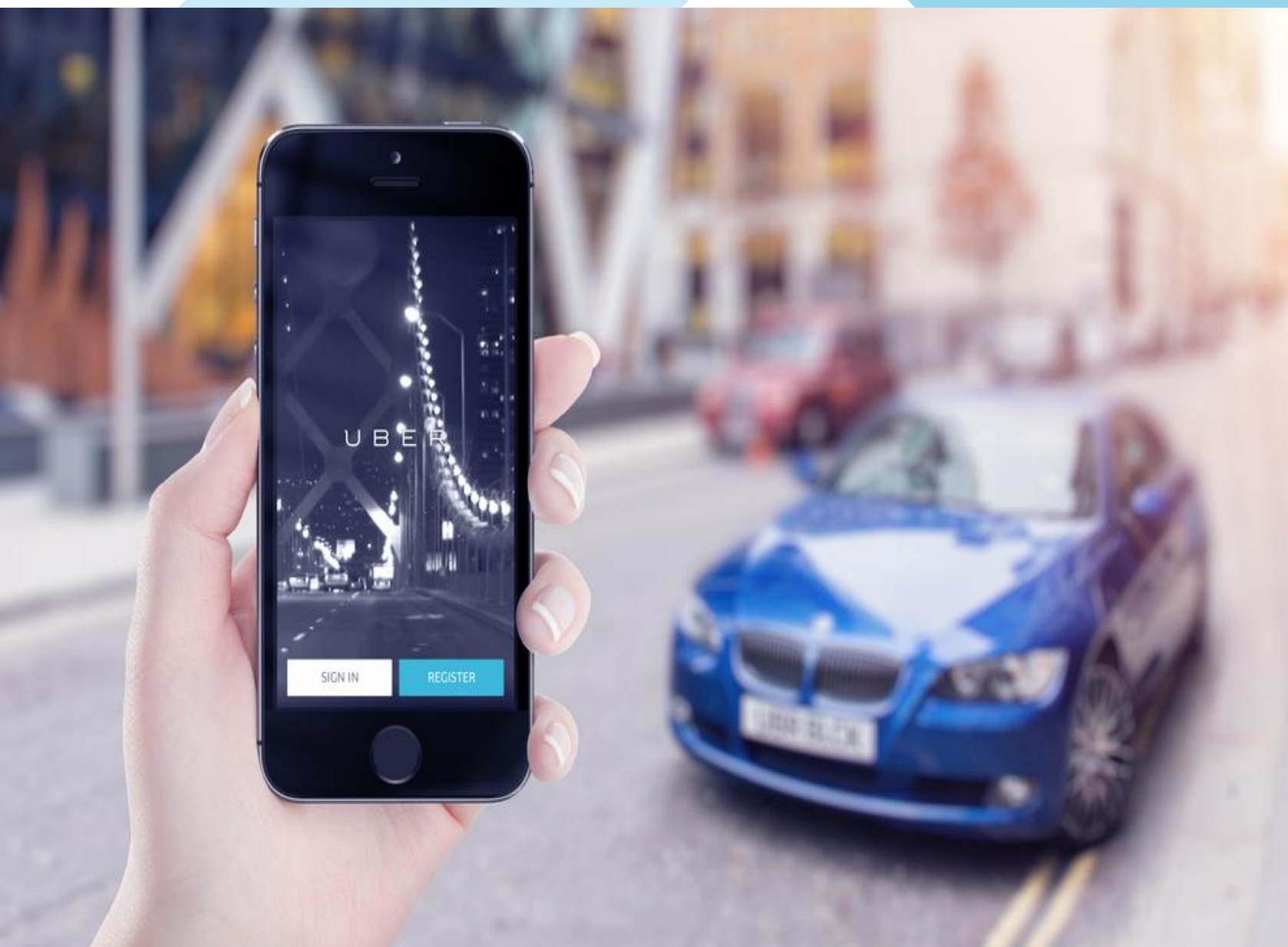


Agenda

1. Research: Travel Outlook
2. Research: Mobile Usage & Behavior by US Travelers
3. Research: Use of Mobile in the Trip Planning Process
4. *DMO Global Mobile Readiness Index – 2016 update incl. App vs. No App?*
5. **Spotlight:** 5 Best Practices for Next Generation Mobile

THE STATE OF THE AMERICAN TRAVELER

MOBILE EDITION



The State of the American Traveler

- 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
- October 2016

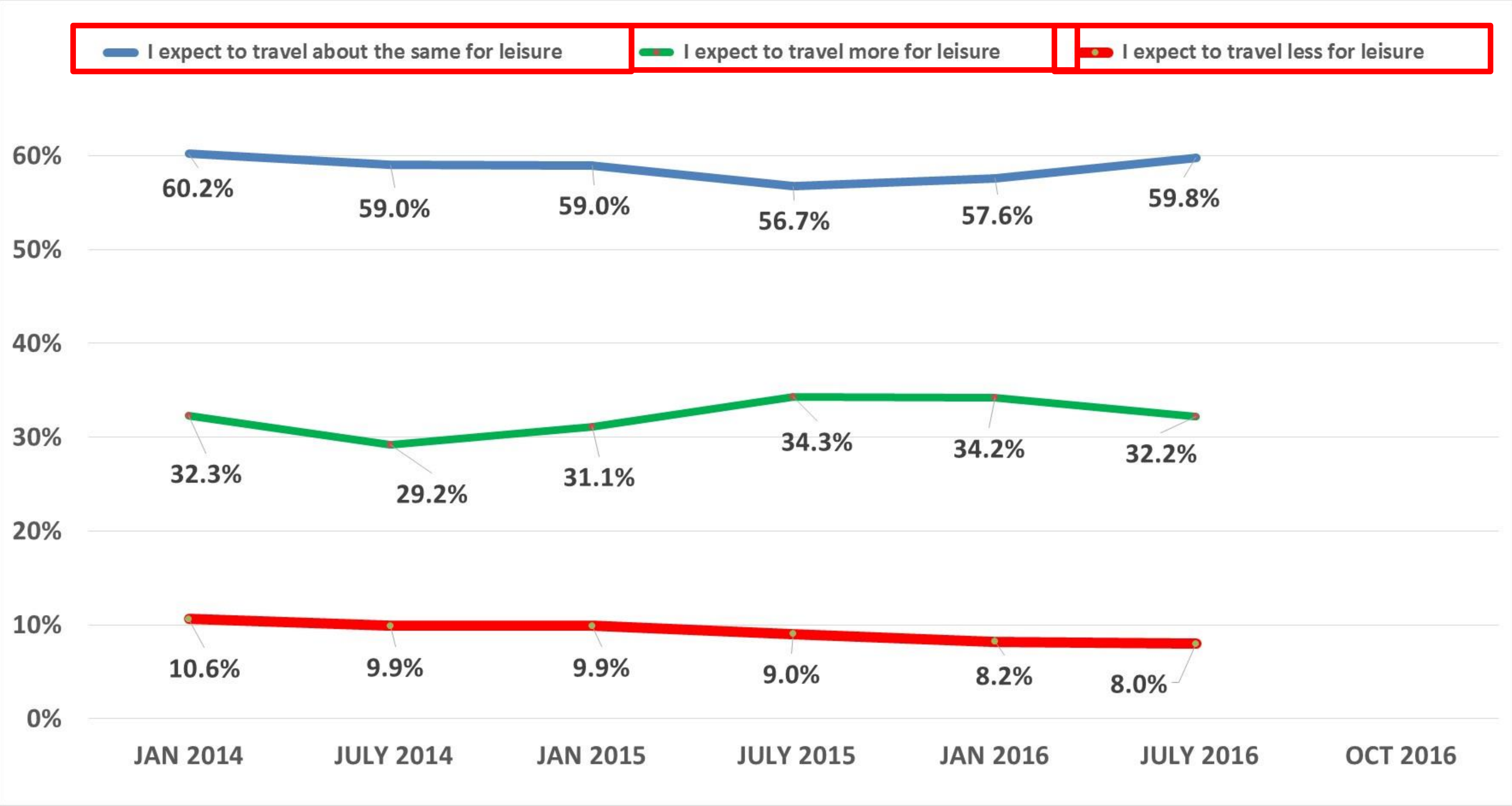




The image features three vertical bars of equal height and width, positioned side-by-side. The leftmost bar is a solid light blue. The middle bar is a solid orange and contains the text 'AMERICAN TRAVELER SENTIMENT' in white, centered both horizontally and vertically. The rightmost bar is a solid light green.

AMERICAN TRAVELER SENTIMENT

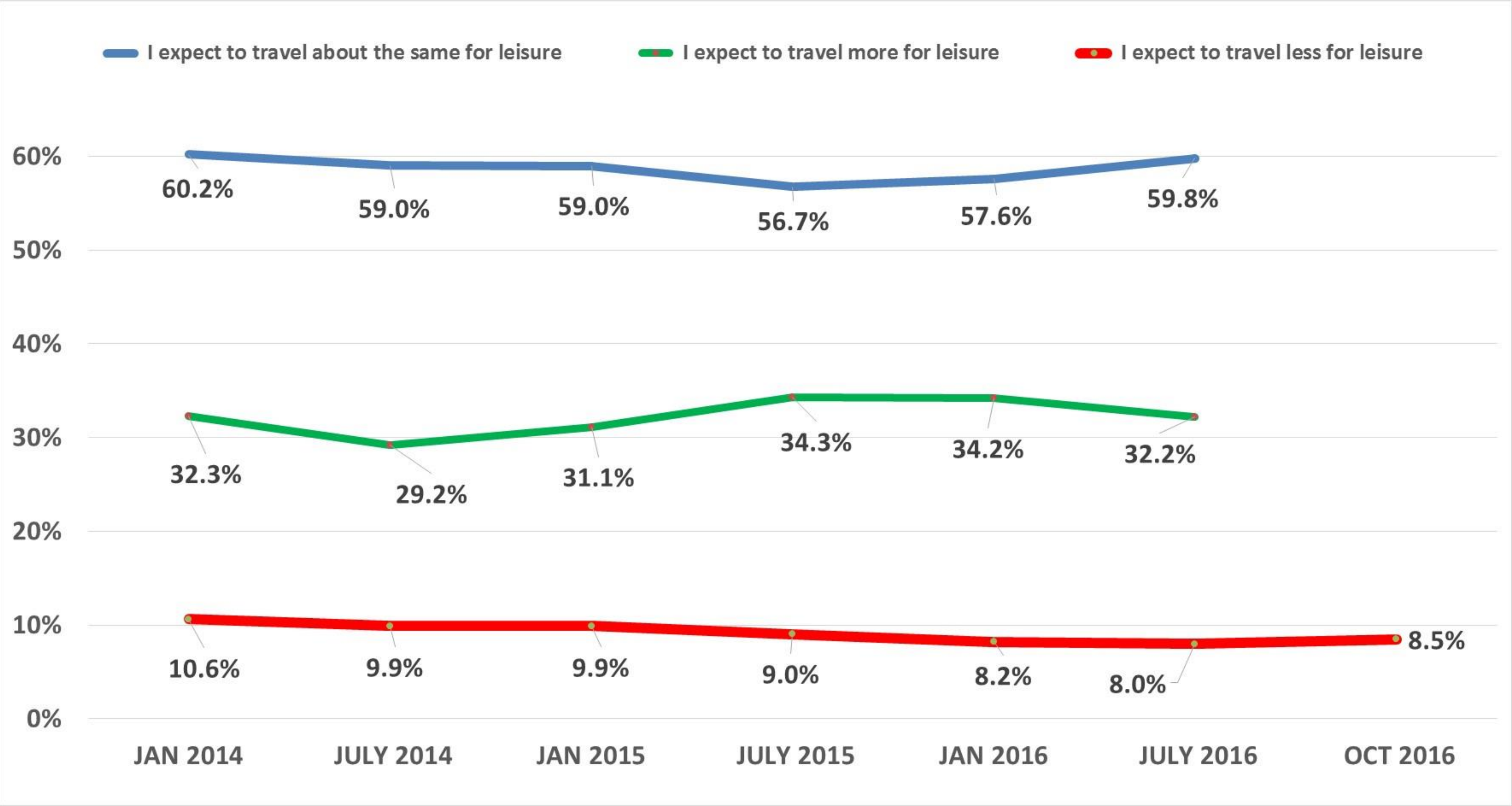
Leisure Travel Optimism: Trips (Next 12 Months)



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

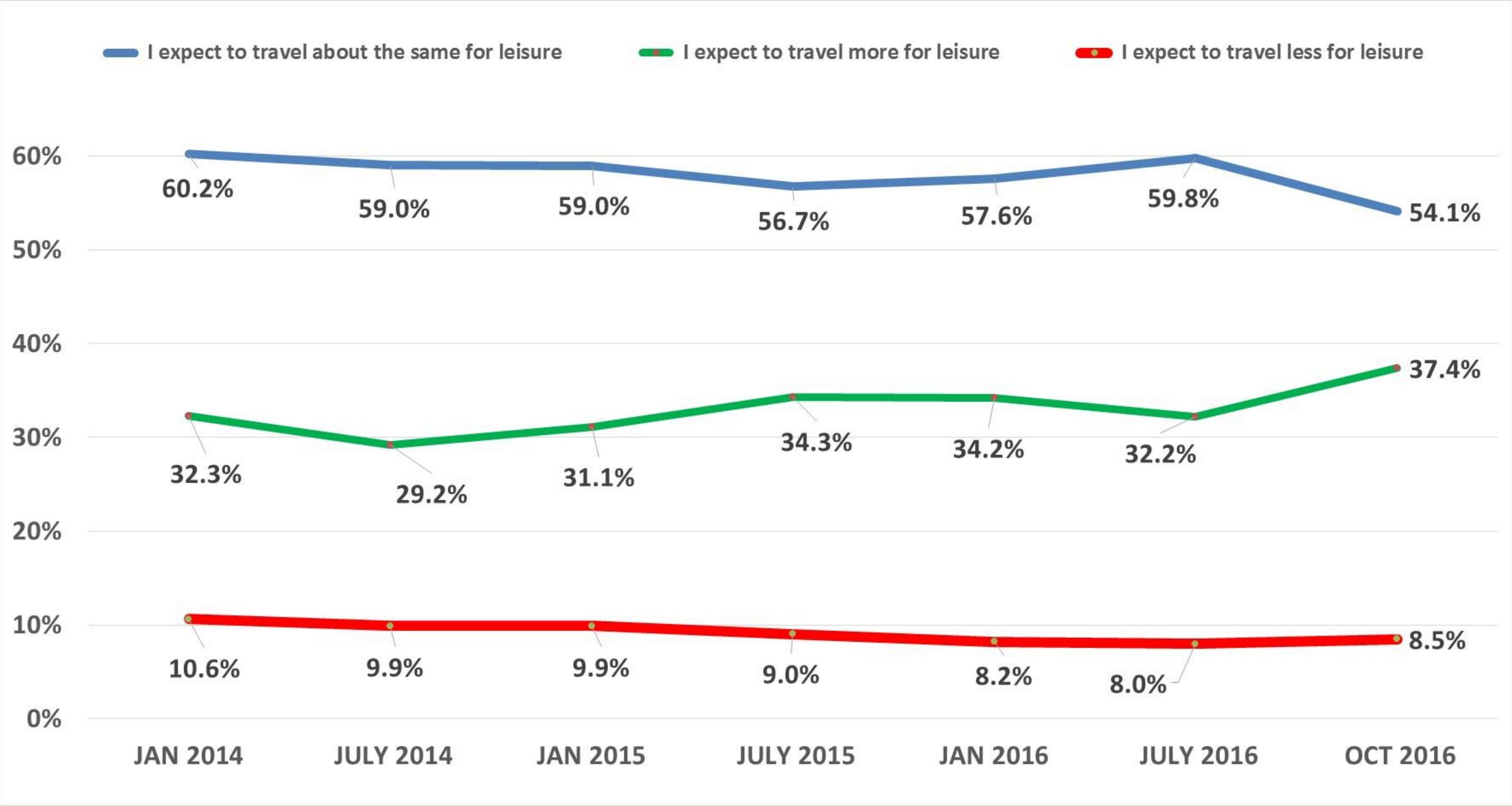
Source: The State of the American Traveler, Destination Analysts, Inc.

Leisure Travel Optimism: Trips (Next 12 Months)



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

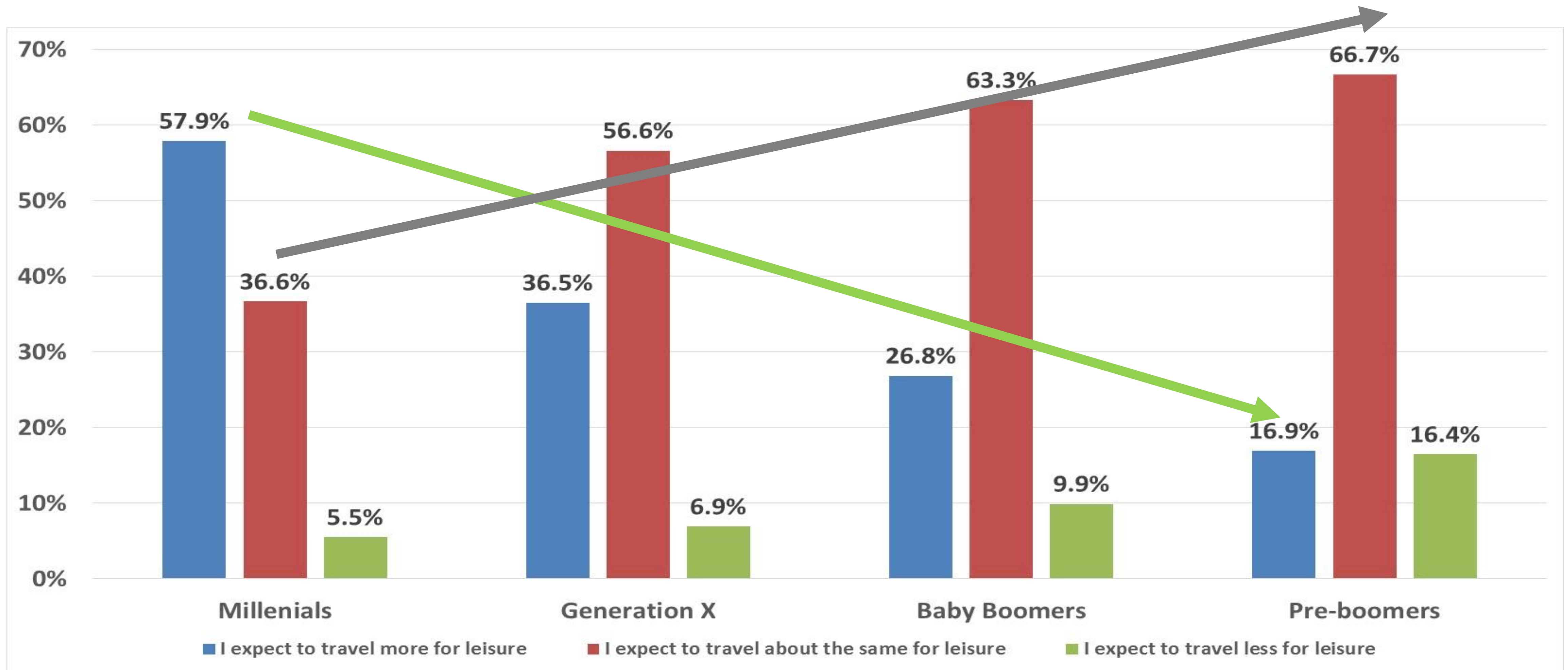
Leisure Travel Optimism: Trips (Next 12 Months)



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

Source: The State of the American Traveler, Destination Analysts, Inc.

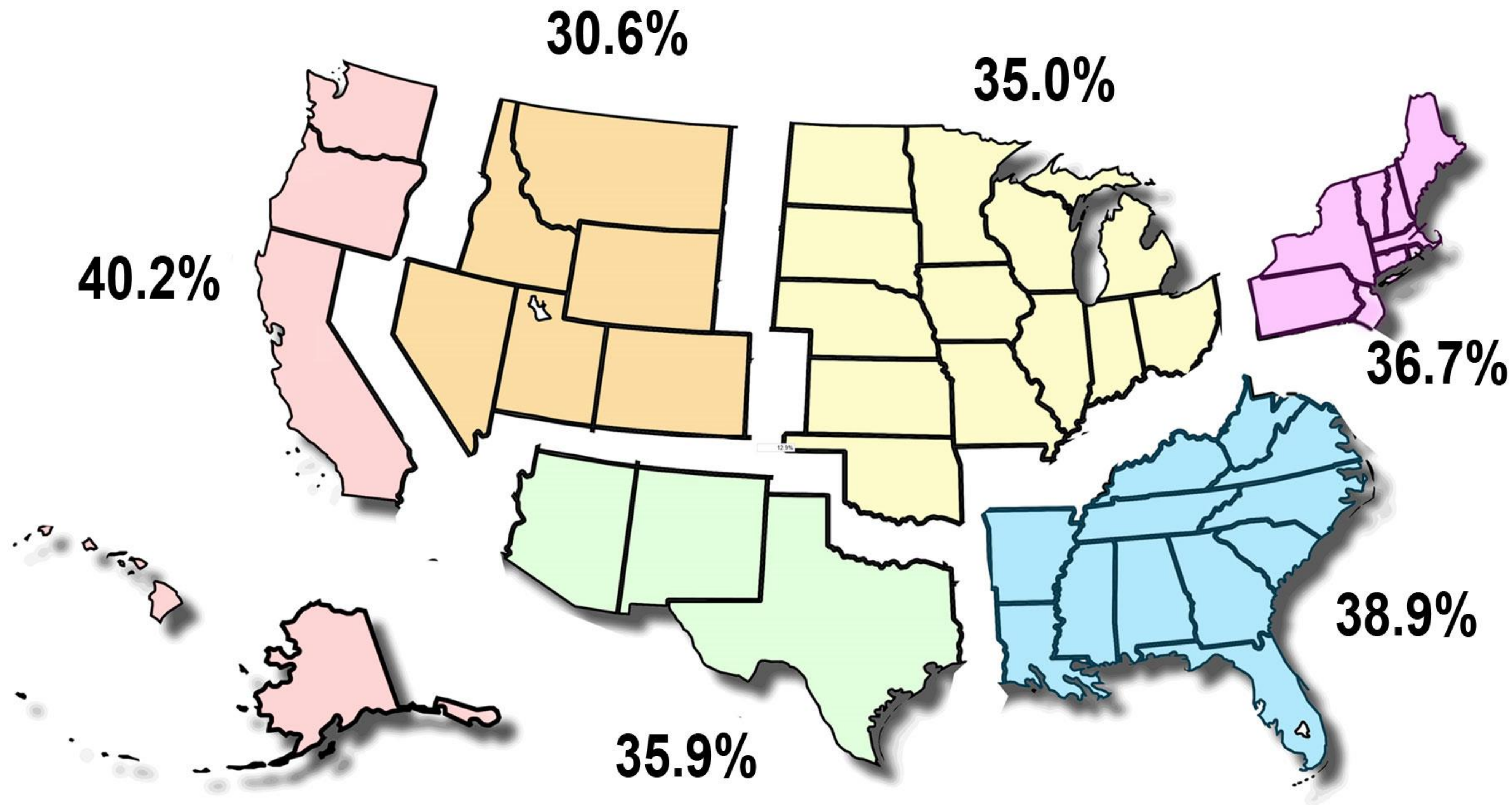
Travel Optimism by Generation: Trips (Next 12 Months)



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

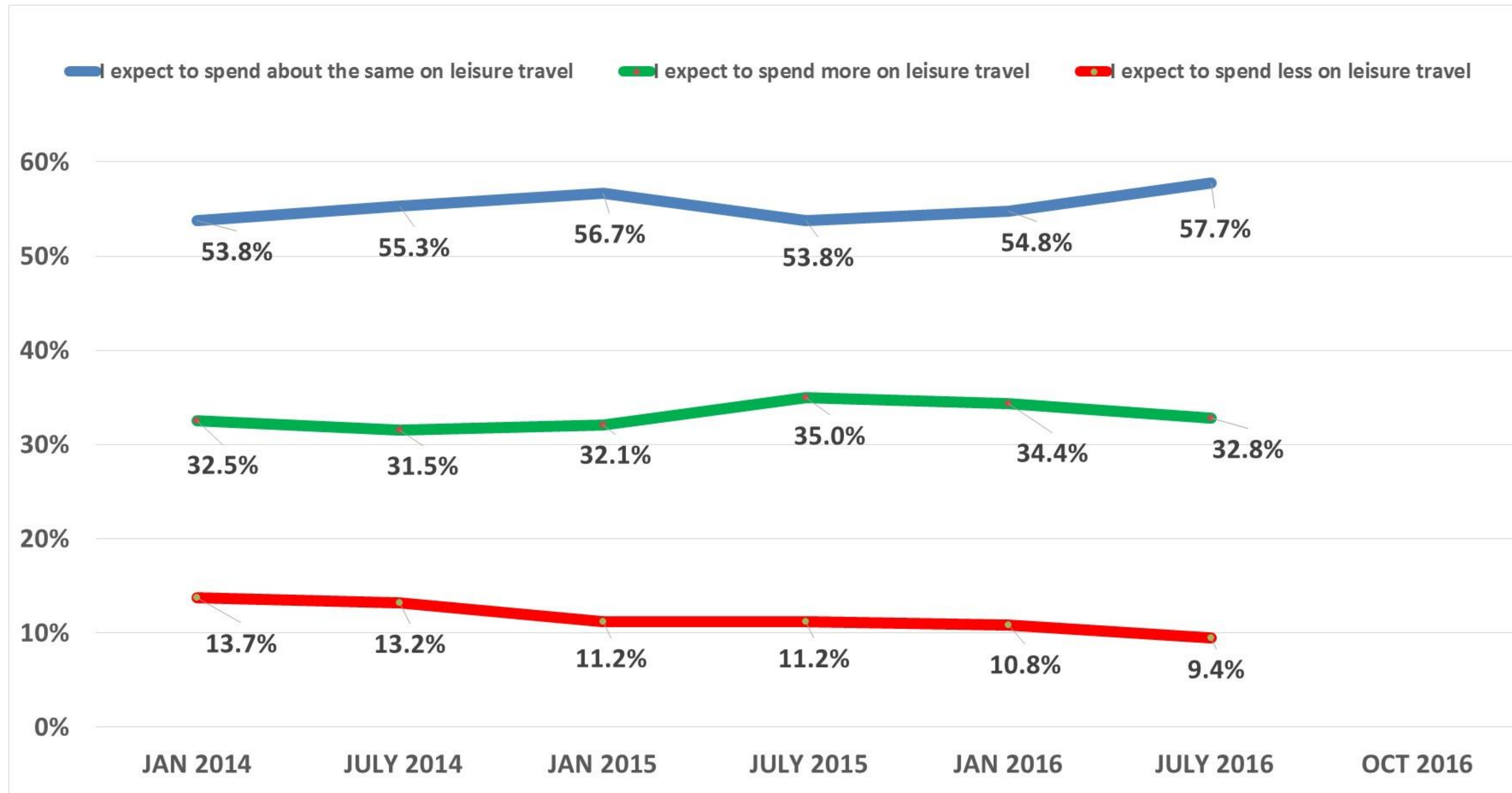
Source: The State of the American Traveler, Destination Analysts, Inc.

Plan to Increase Travels (Next 12 Months)



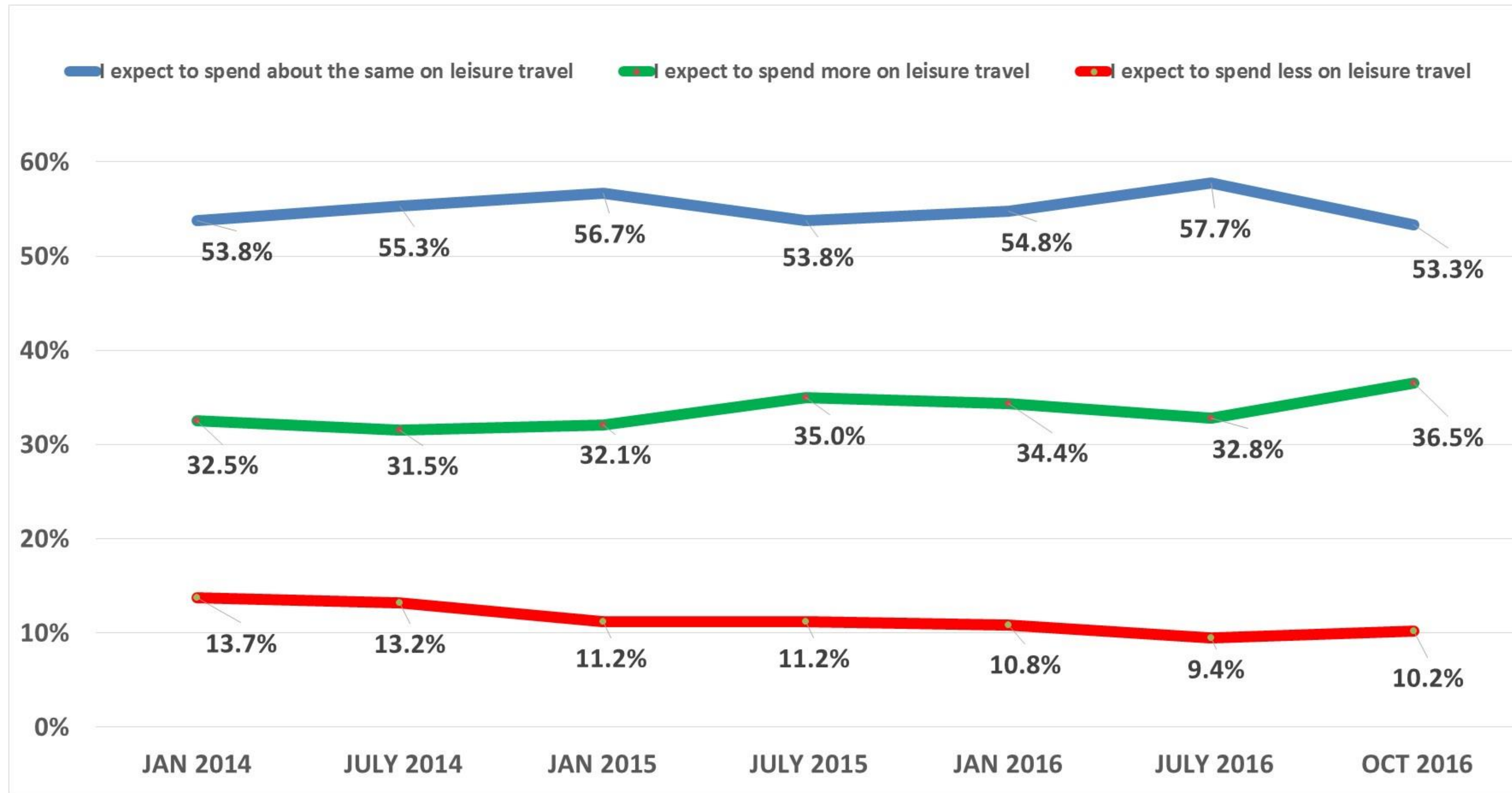
Percent of Leisure Travelers Planning to Increase their Travels, by Region

Travel Optimism: Spending (Next 12 Months)



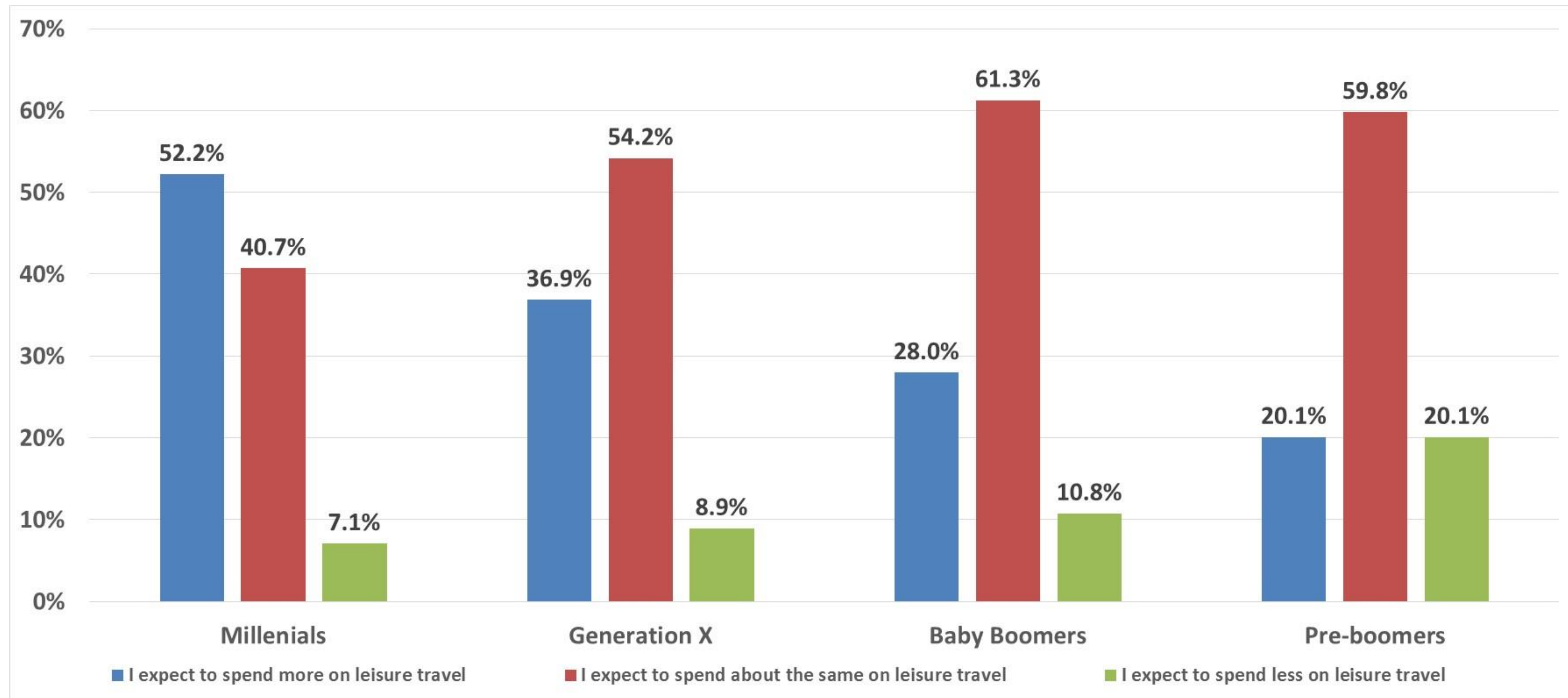
In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

Travel Optimism: Spending (Next 12 Months)



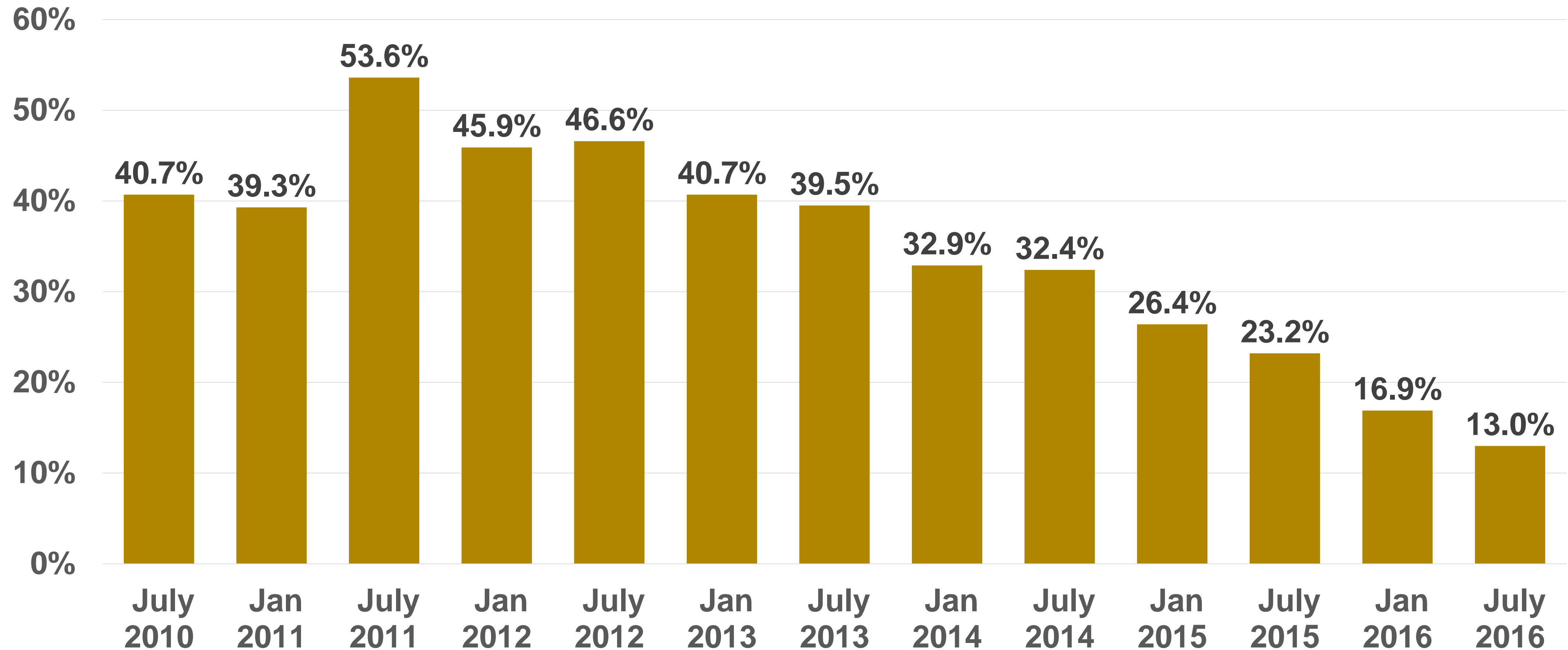
In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

Travel Optimism: Spending (Next 12 Months)



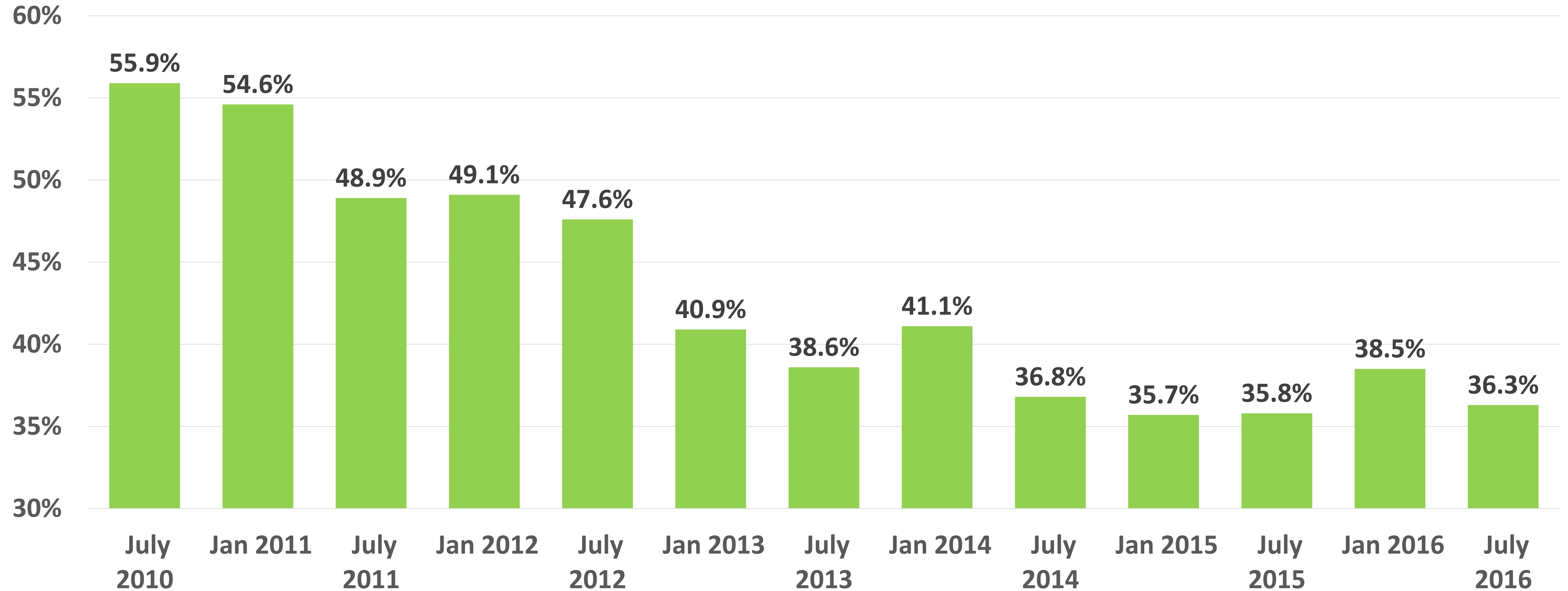
In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

Impediments to Travel: Gasoline Prices



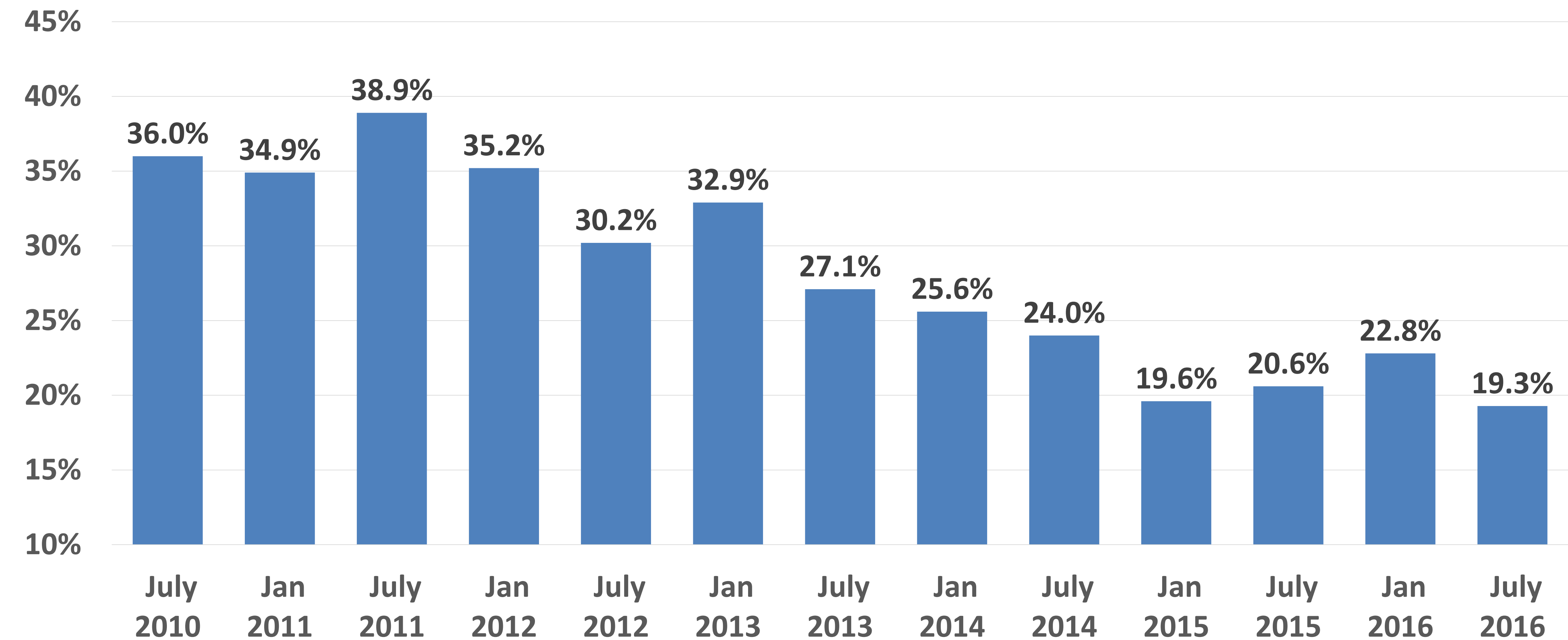
Percent of Leisure Travelers

Impediments to Travel: Personal Finances



Percent of Leisure Travelers

Impediments to Travel: Airfare too Expensive



Percent of Leisure Travelers



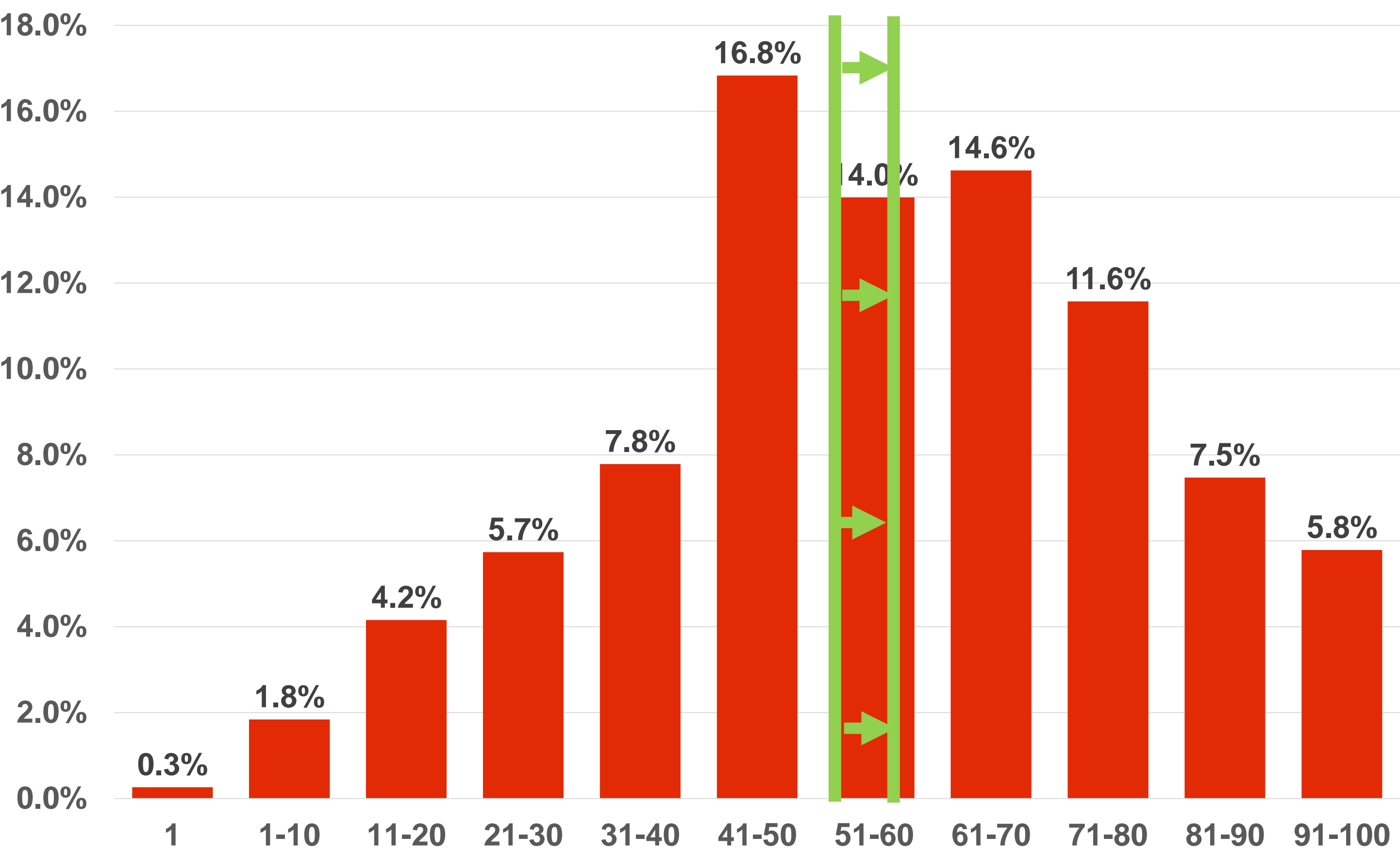
TRAVELERS AND THEIR MOBILE PHONES



Destination Analysts' ***Mobile Addiction Test***

- **Scored on 6 questions on:**
 - **Behaviors and emotions regarding mobile phones**
- **Based on standard addiction self-assessment test methodologies**
- **Each respondent scored from 1 to 100**
- **Measured twice:**
 - **January 2015**
 - **October 2016**

Mobile Phone Addiction Score: Leisure Travelers (2016)



National Average

Jan 2015 = 51

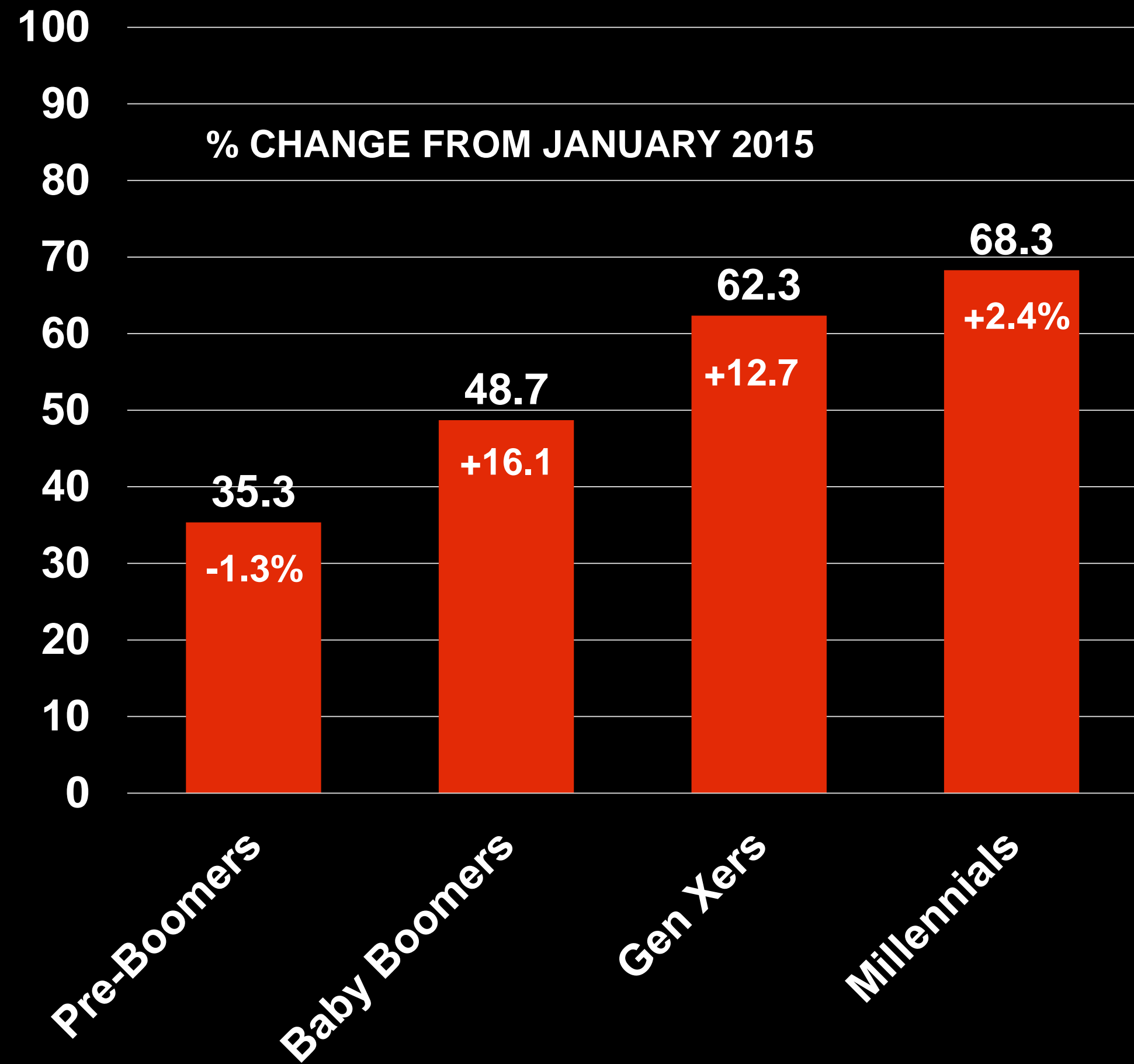
Oct 2016 = 57

Less addicted <<<<----->>>> More addicted

Mobile Phone Addiction Score, Sept. 2016

Generational Perspective

(Sept. 2016)



What Hasn't Changed?

(Jan 2015 to Oct 2016)

Q: Do you own or regularly use a mobile phone?

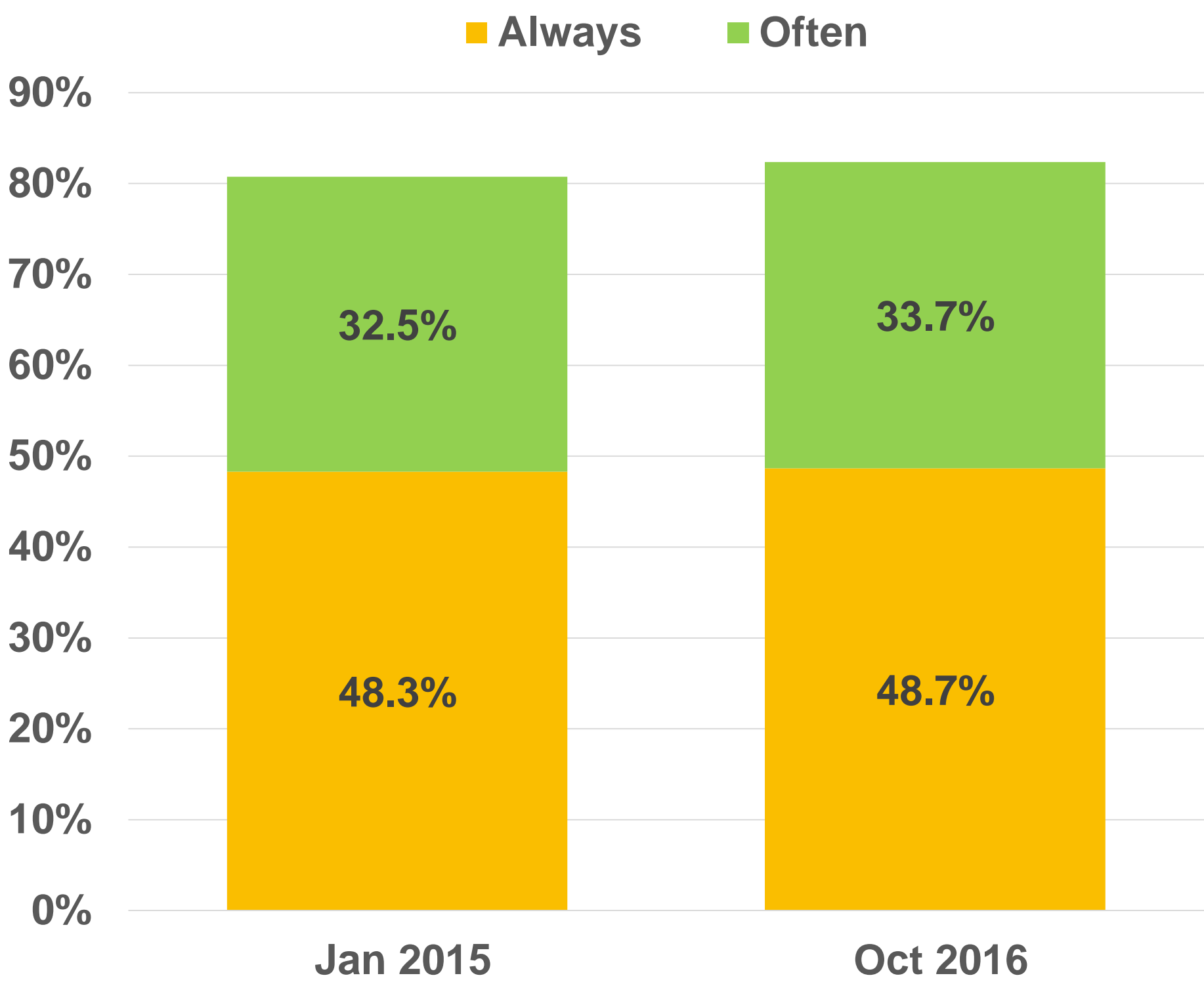
2015	2016
94.0%	94.2%



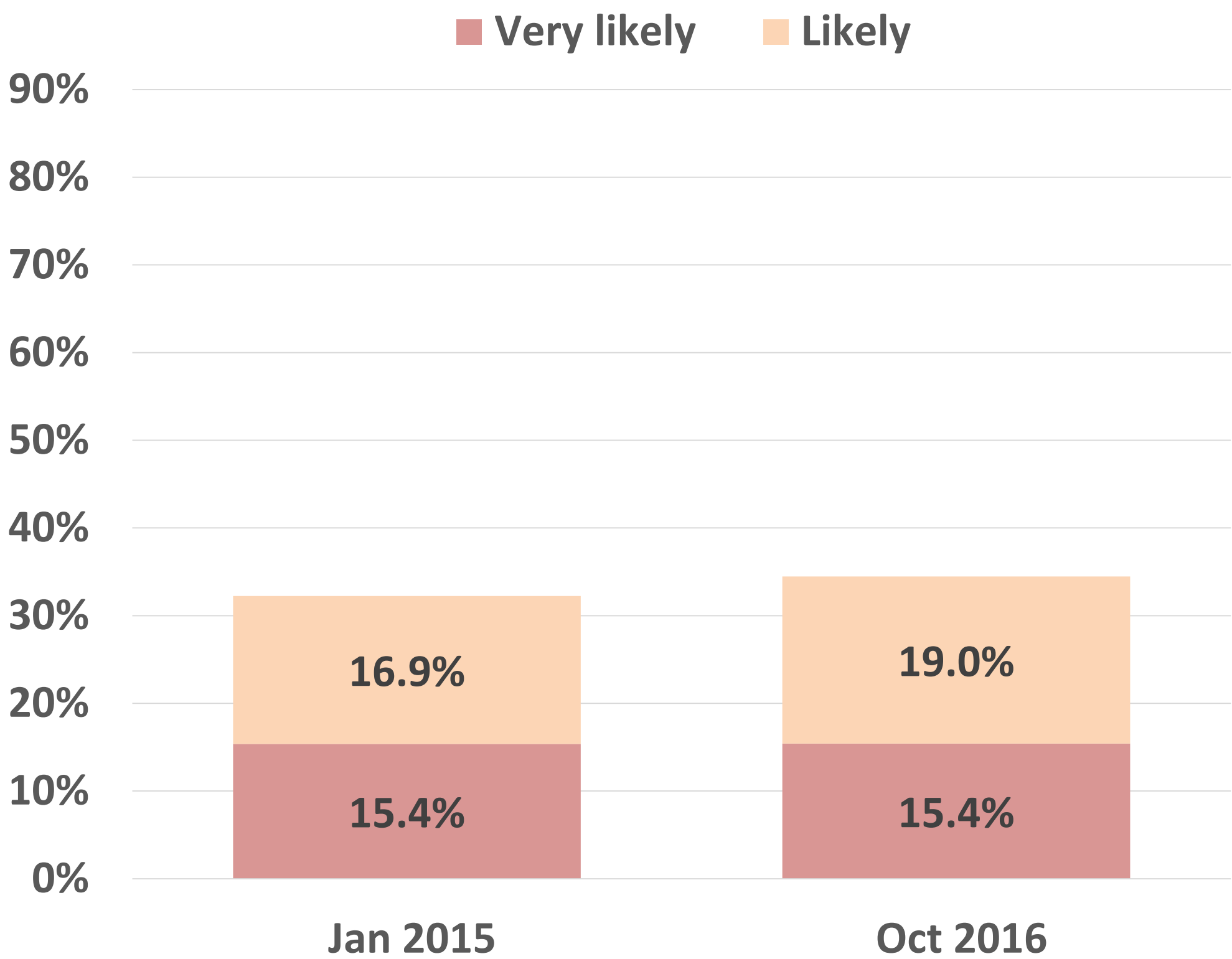
What Hasn't Changed?

(Jan 2015 to Oct 2016)

In the normal course of your day, how often is your mobile phone on your person (or within easy reach)?
(Select one)



When you are using your mobile device in the company of friends and family, how likely are you to **FEEL GUILTY** (even if momentarily) that you are not interacting with them? (Select one)

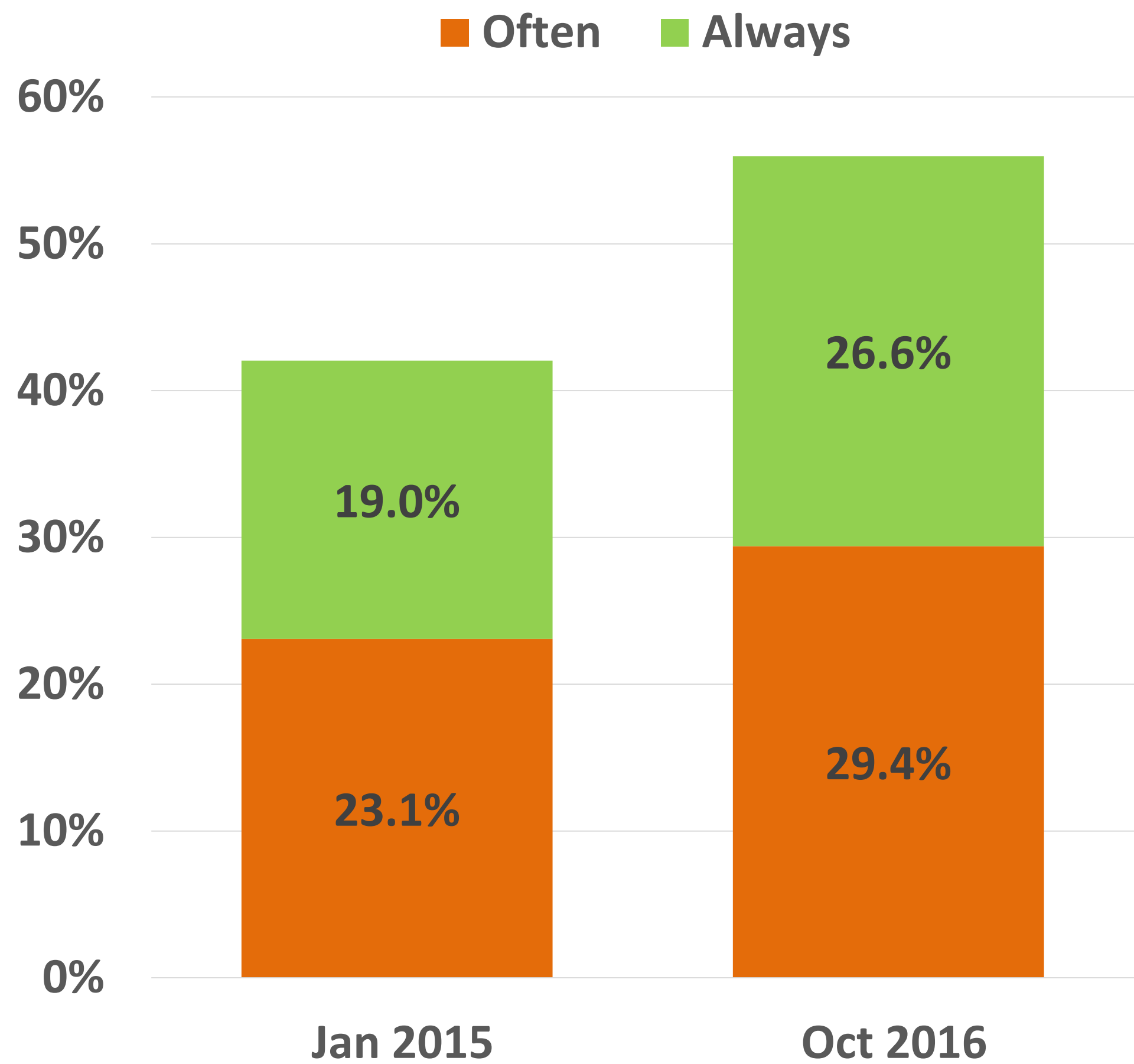


What Has Changed...

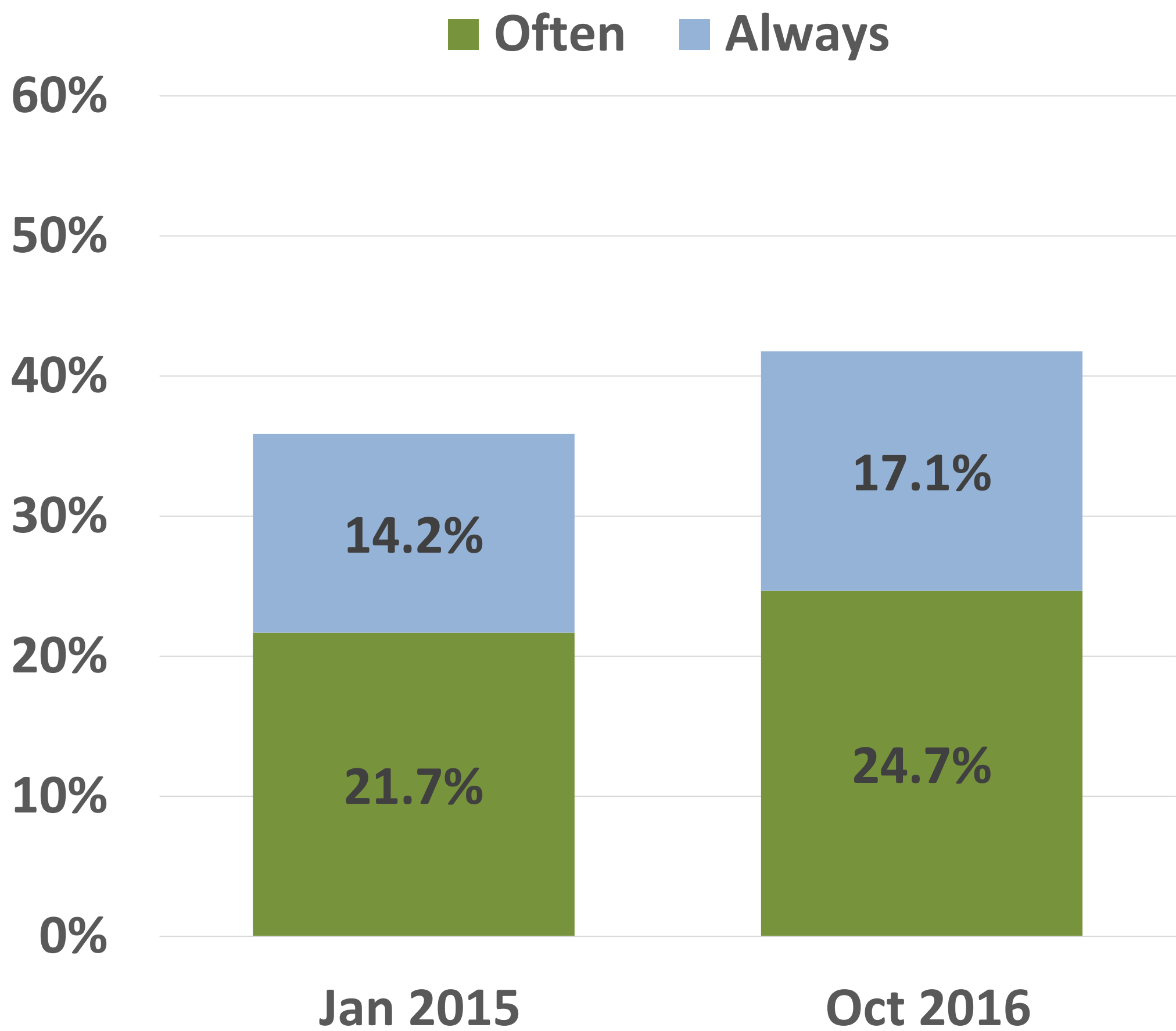
(Jan 2015 to Oct 2016)



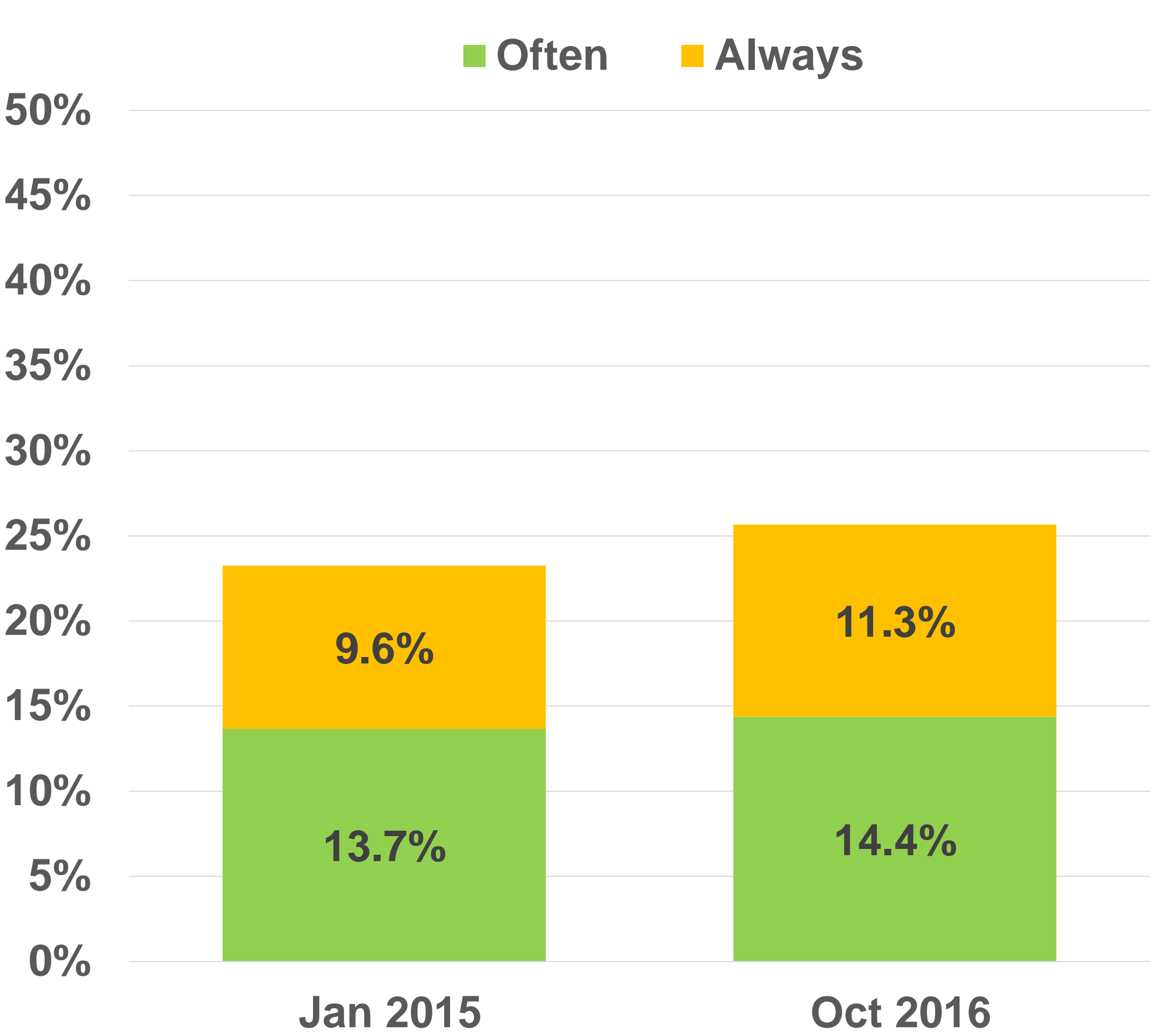
In the normal course of your day, if you become bored or momentarily have some free time, how often will you feel the urge to pick up your mobile phone to entertain yourself? (Select one)



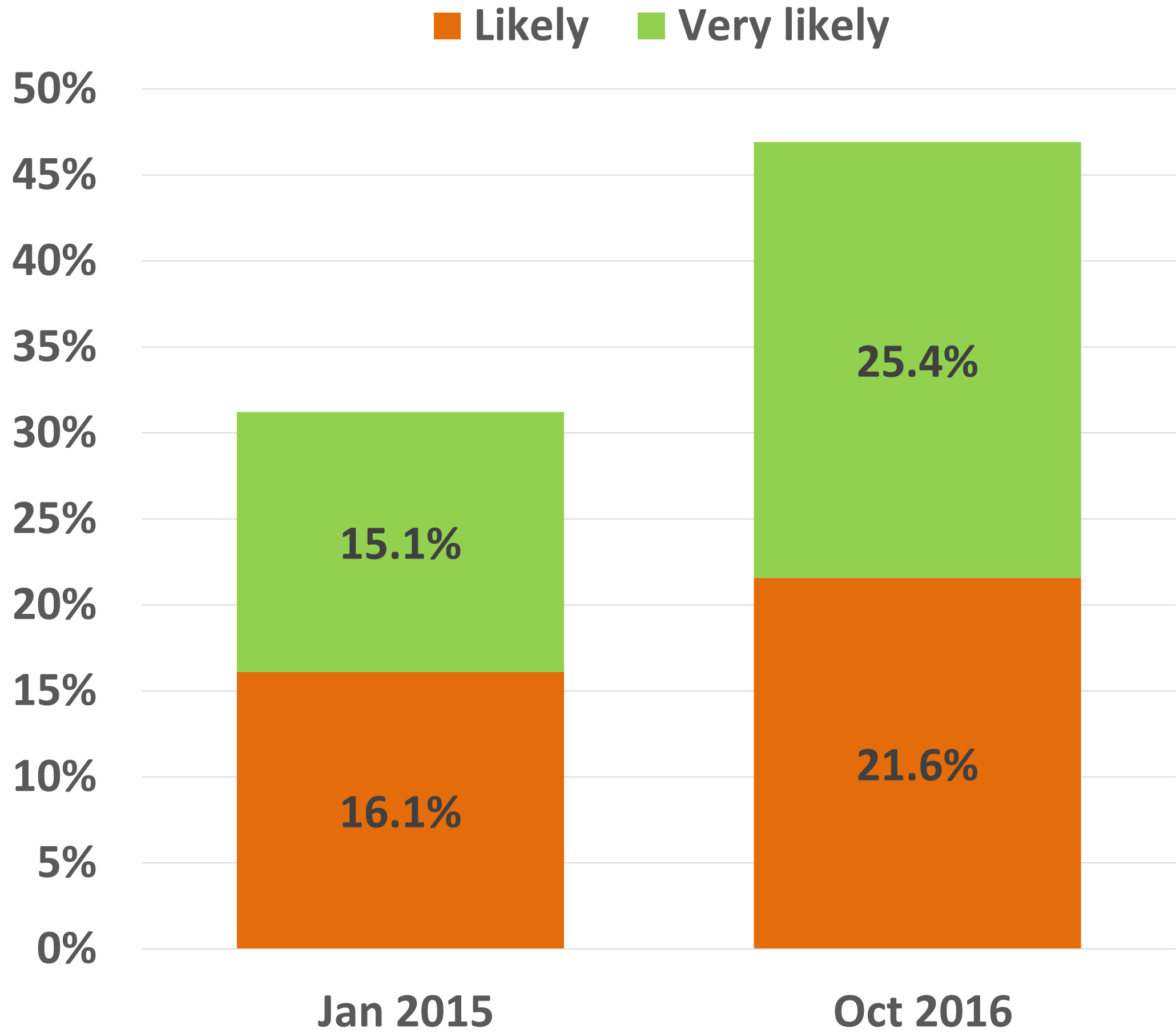
You are in a social situation (e.g., a party, dinner with friends or family, a business meeting, etc.) and you receive a text or email message. How likely are you to immediately look at your mobile device to read it? (Select one)



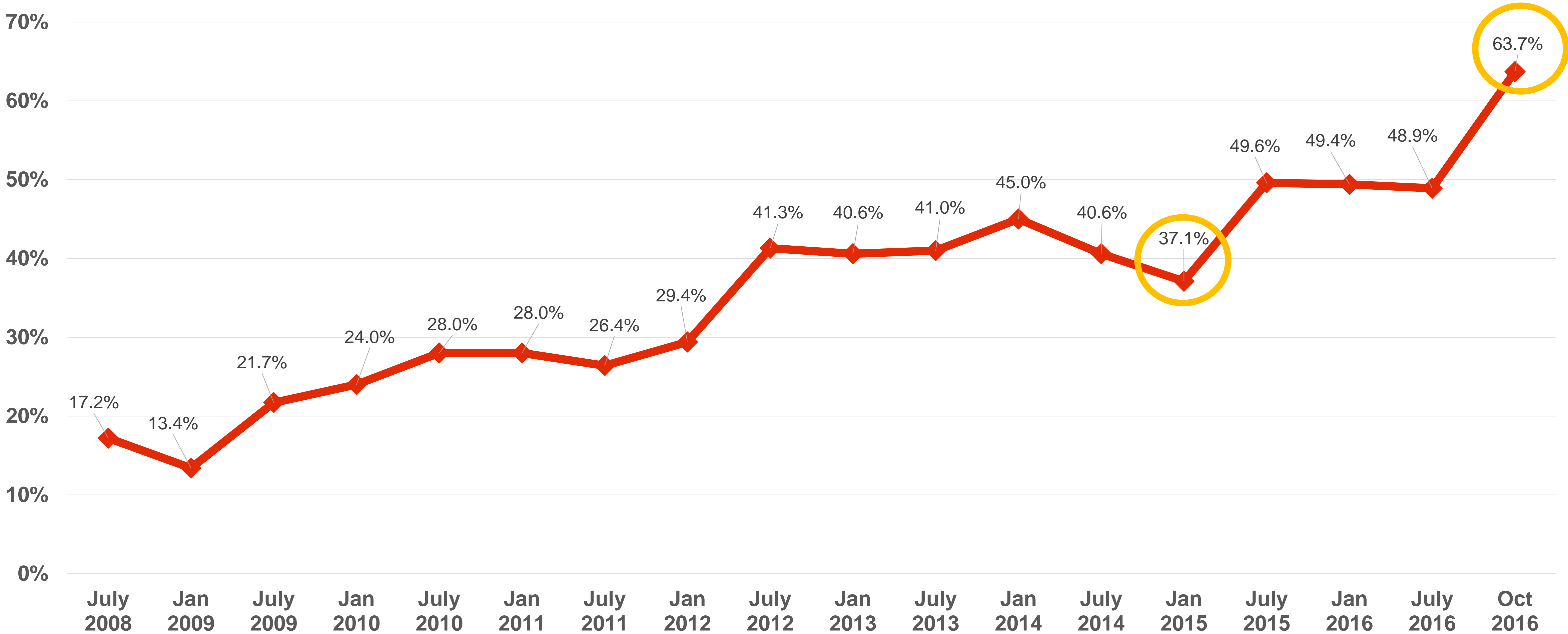
If you are driving and you receive a text or email message, how likely are you to look at your mobile device and read it while driving or at the next stop sign/light? (Select one)



If my mobile device was lost or stolen and I could not replace it within two days, it would be a very emotionally difficult situation for me. (Select one)

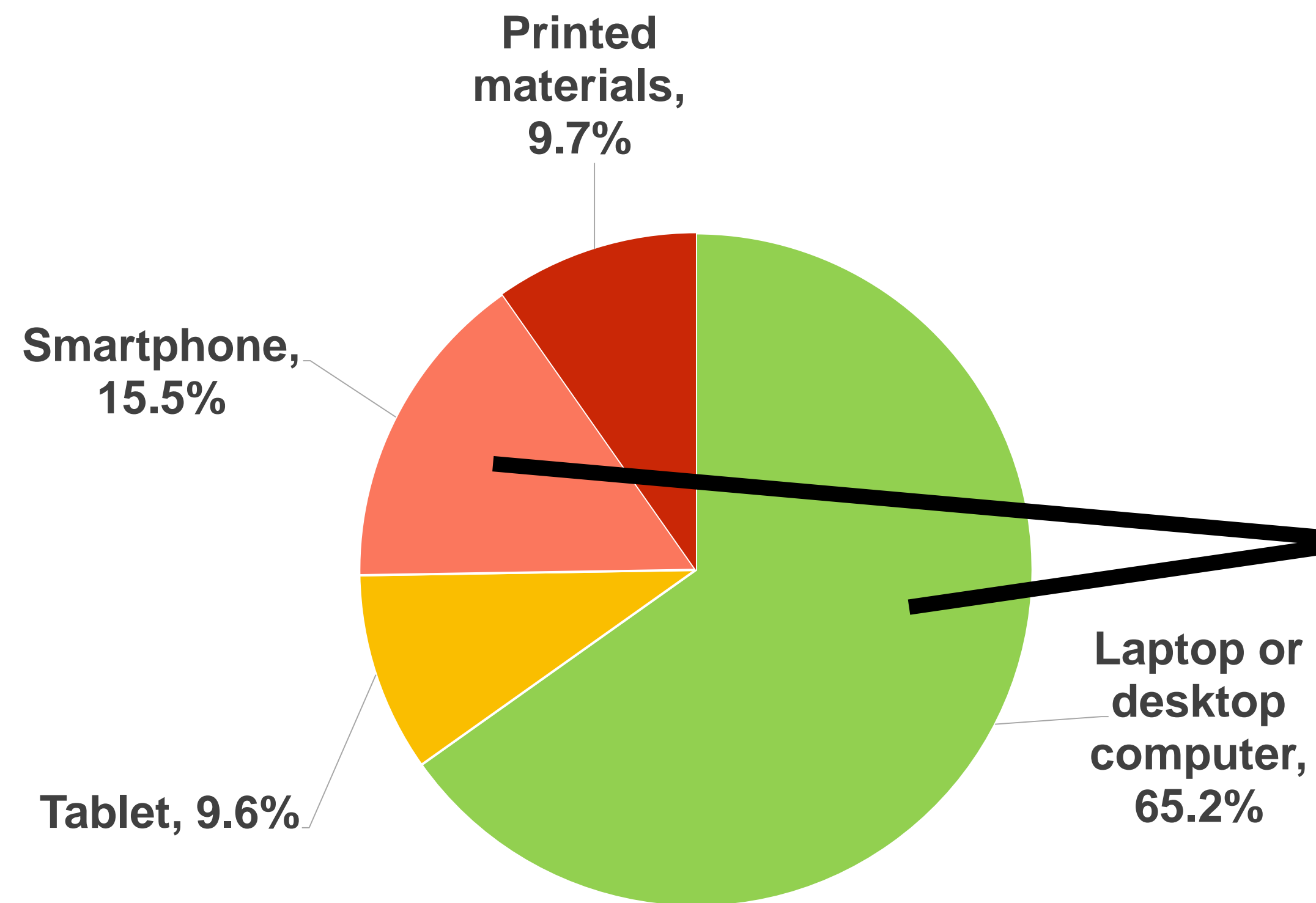


Mobile Phone Usage in Travel Planning

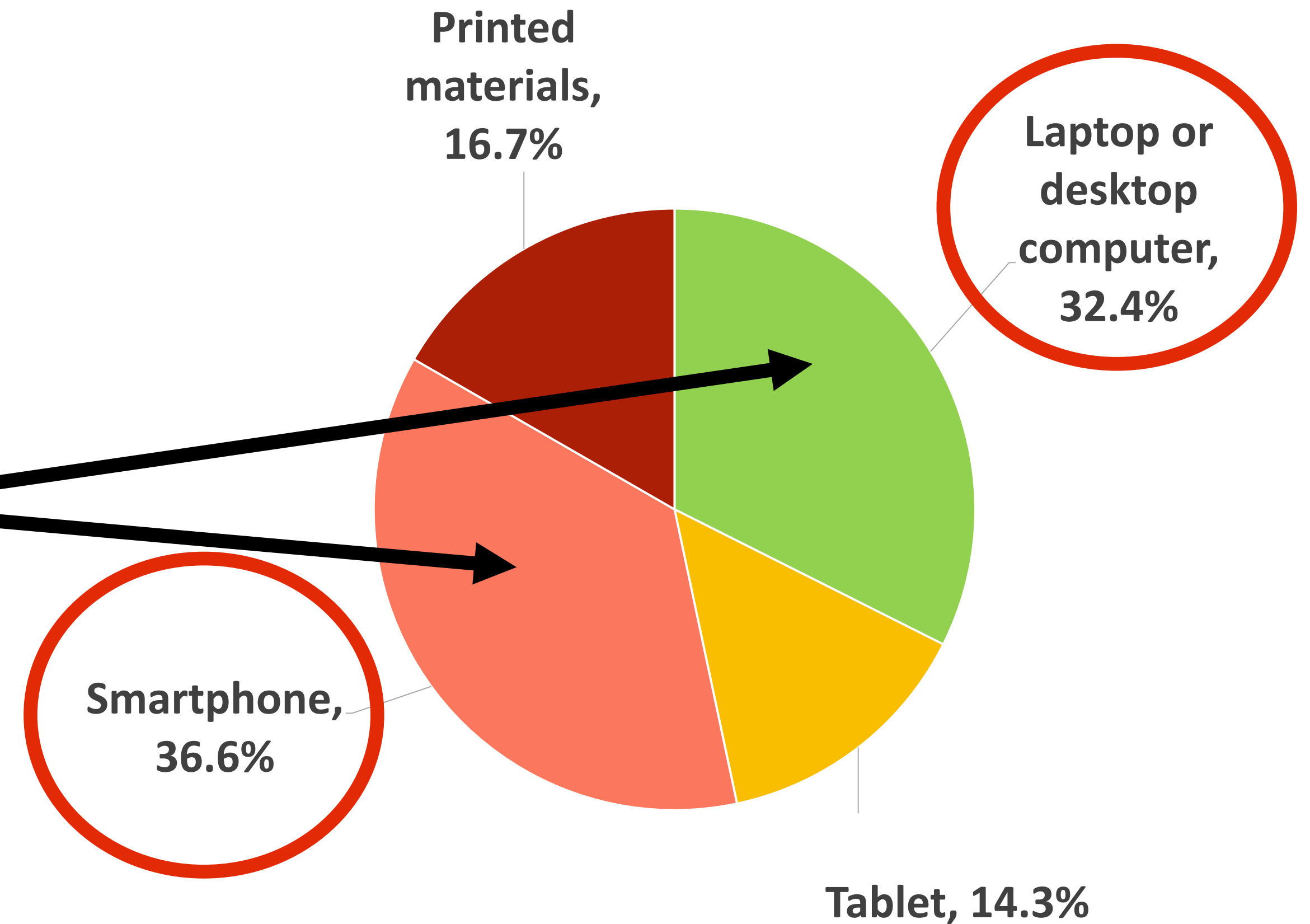


The Importance of Mobile Phones

What percentage of your travel planning is typically done using each of the following before you leave for your trip?

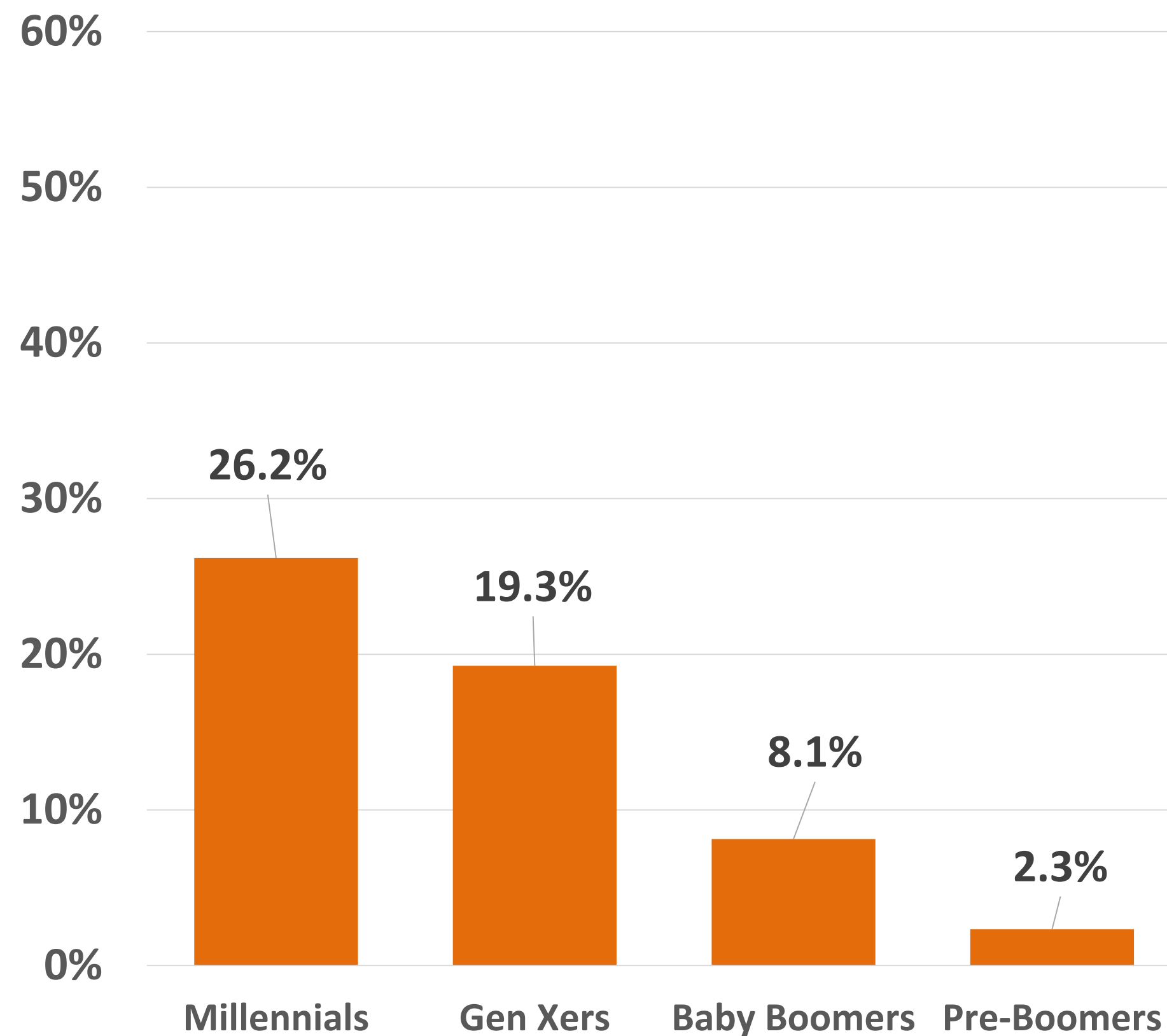


What percentage of your travel planning is typically done using each of the following while on your trip?



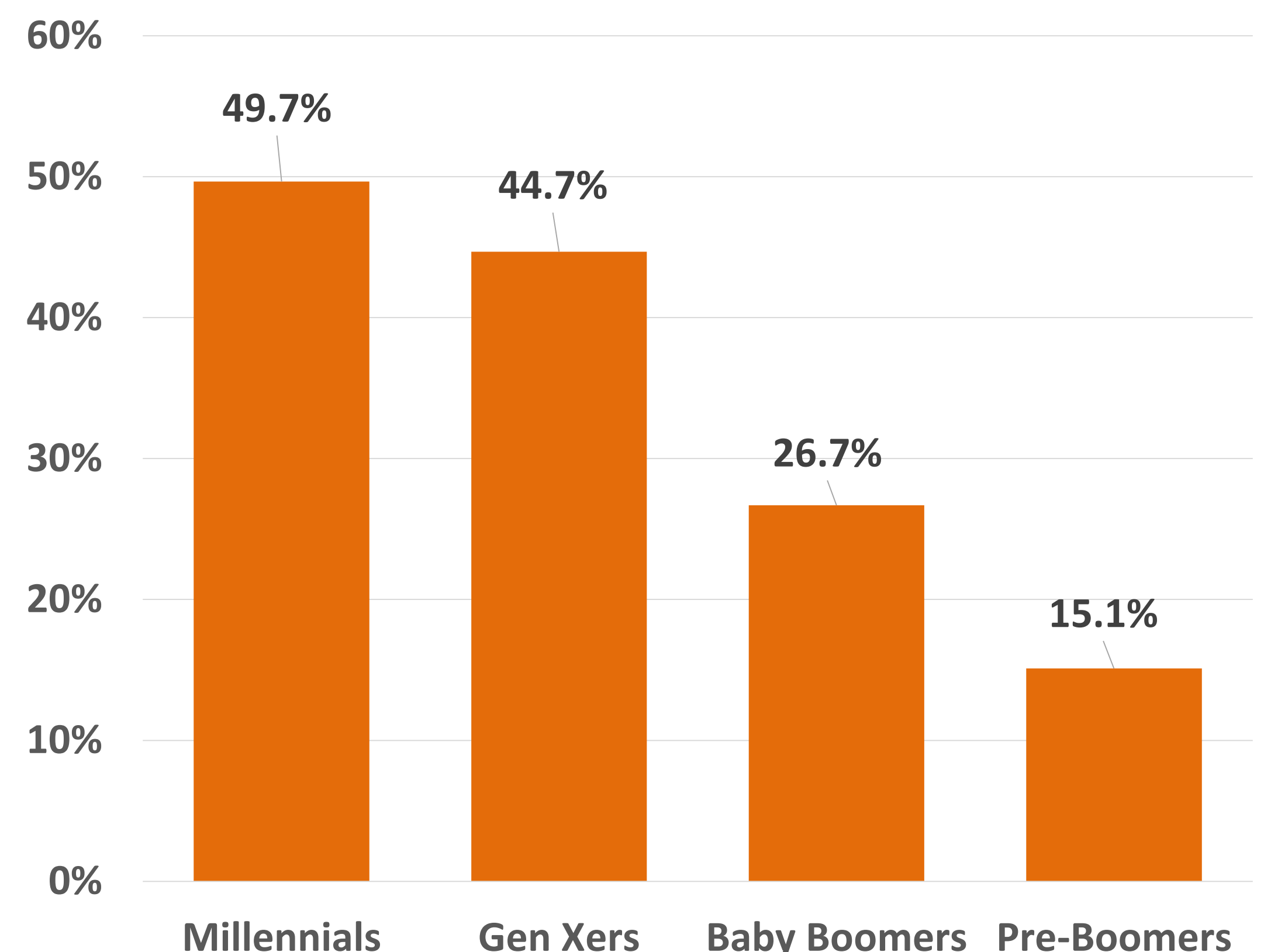
The Importance of Mobile Phones: by Generation

Smart phones (Before Leaving Home)



% of Travel Planning

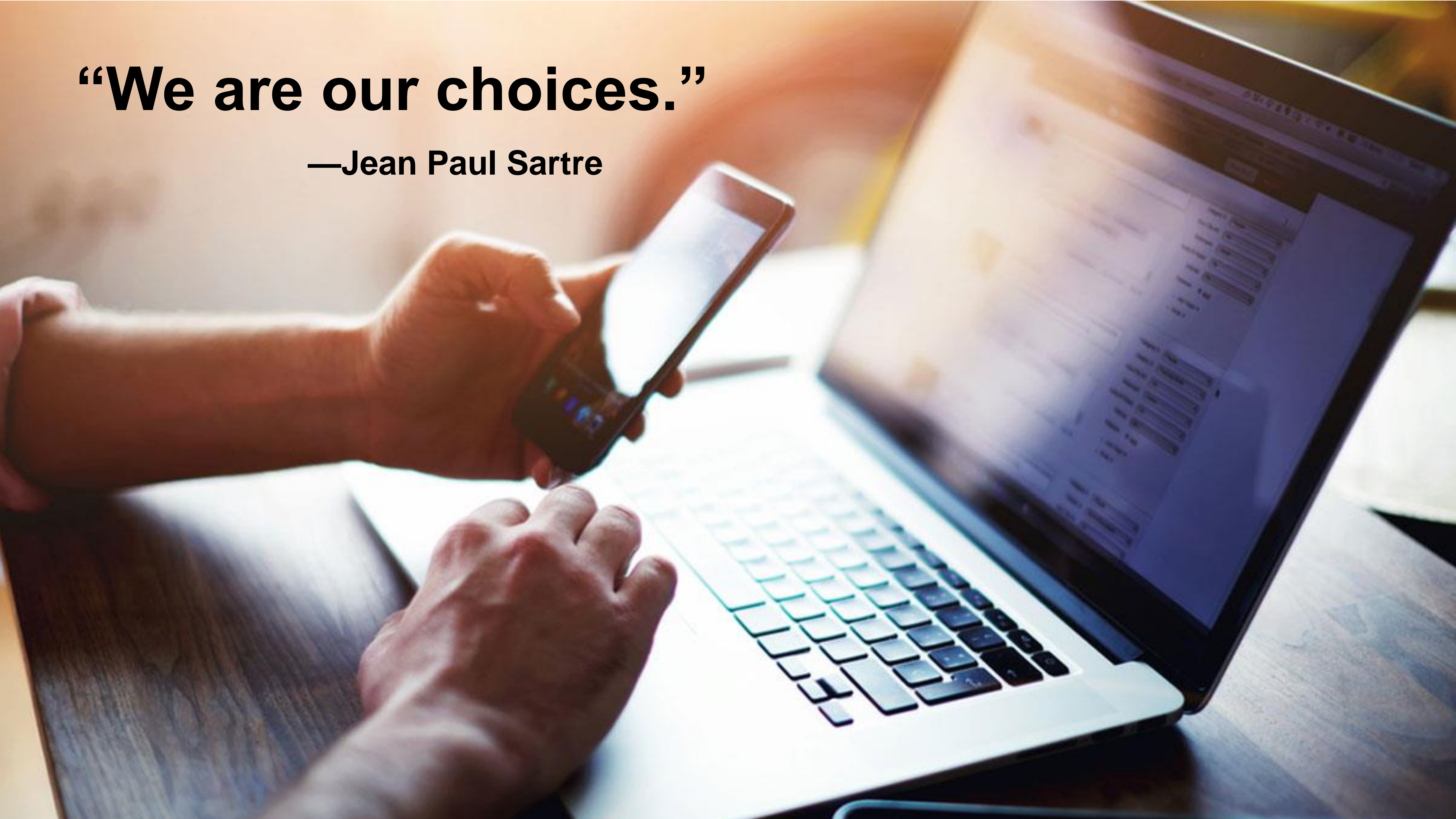
Smart phones (While Traveling)



% of Travel Planning

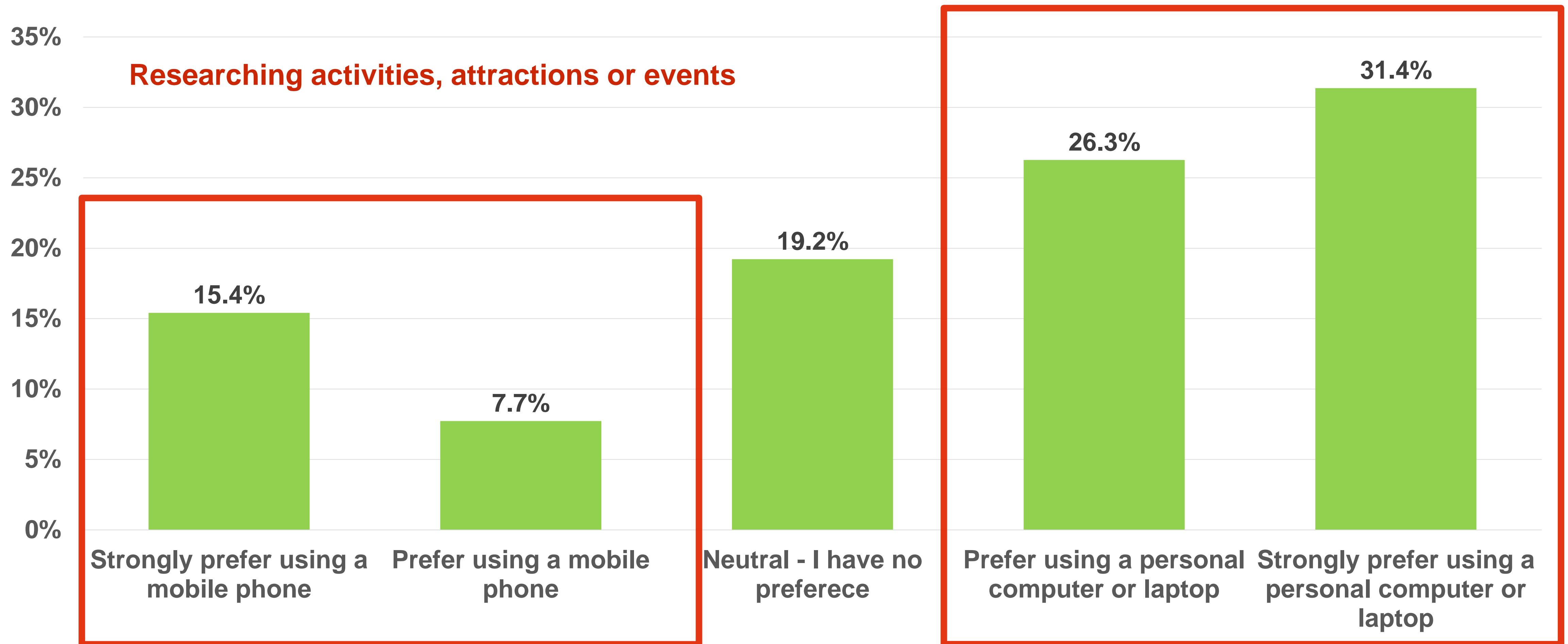
“We are our choices.”

—Jean Paul Sartre

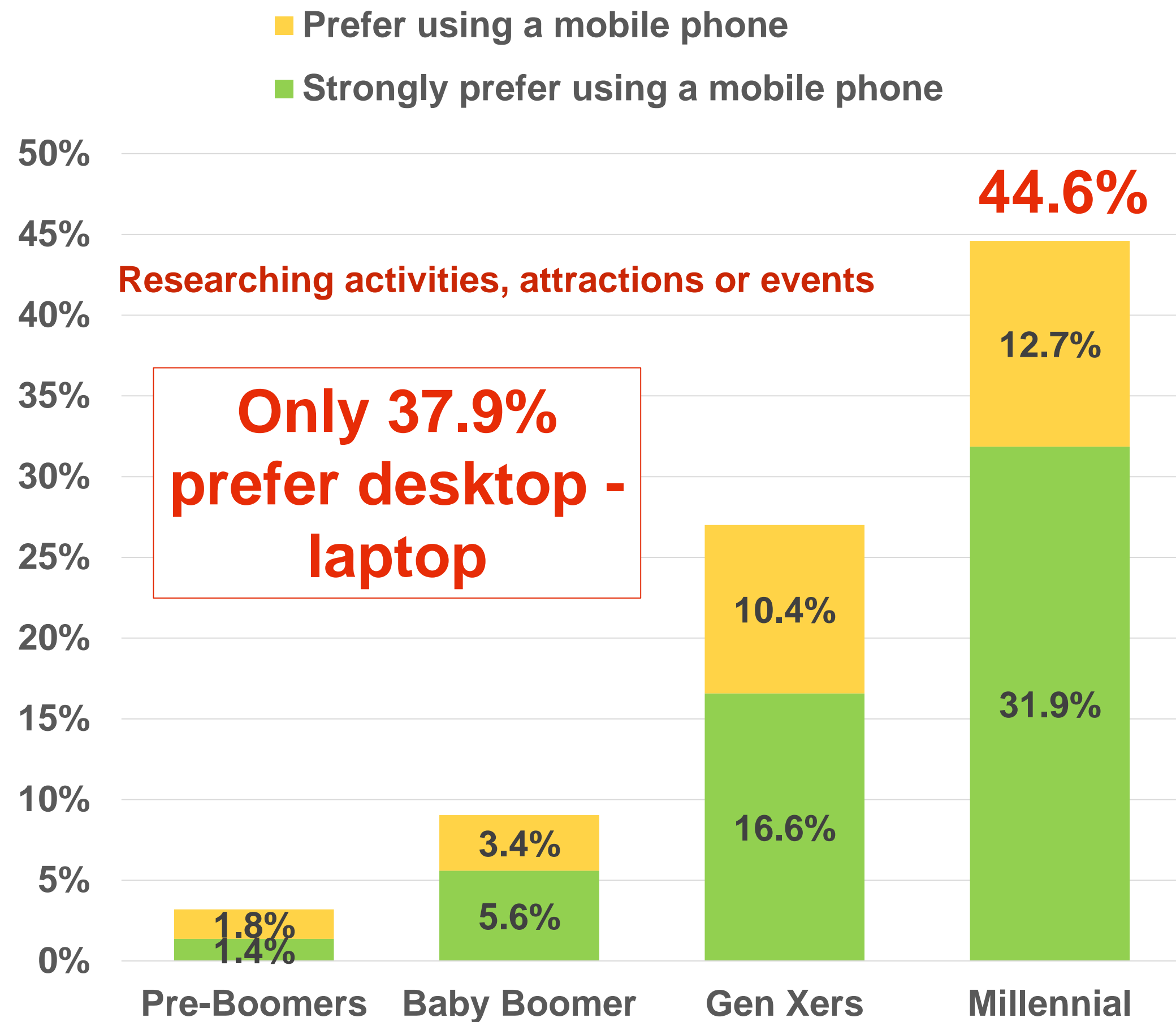


Preferred Method of Travel Planning

If you were given the choice of using a mobile phone or a desktop or laptop computer (PC or Mac), which would you generally prefer to use for each of these travel planning tasks?



Prefer Using Mobile Phone Over Laptop/Desktop



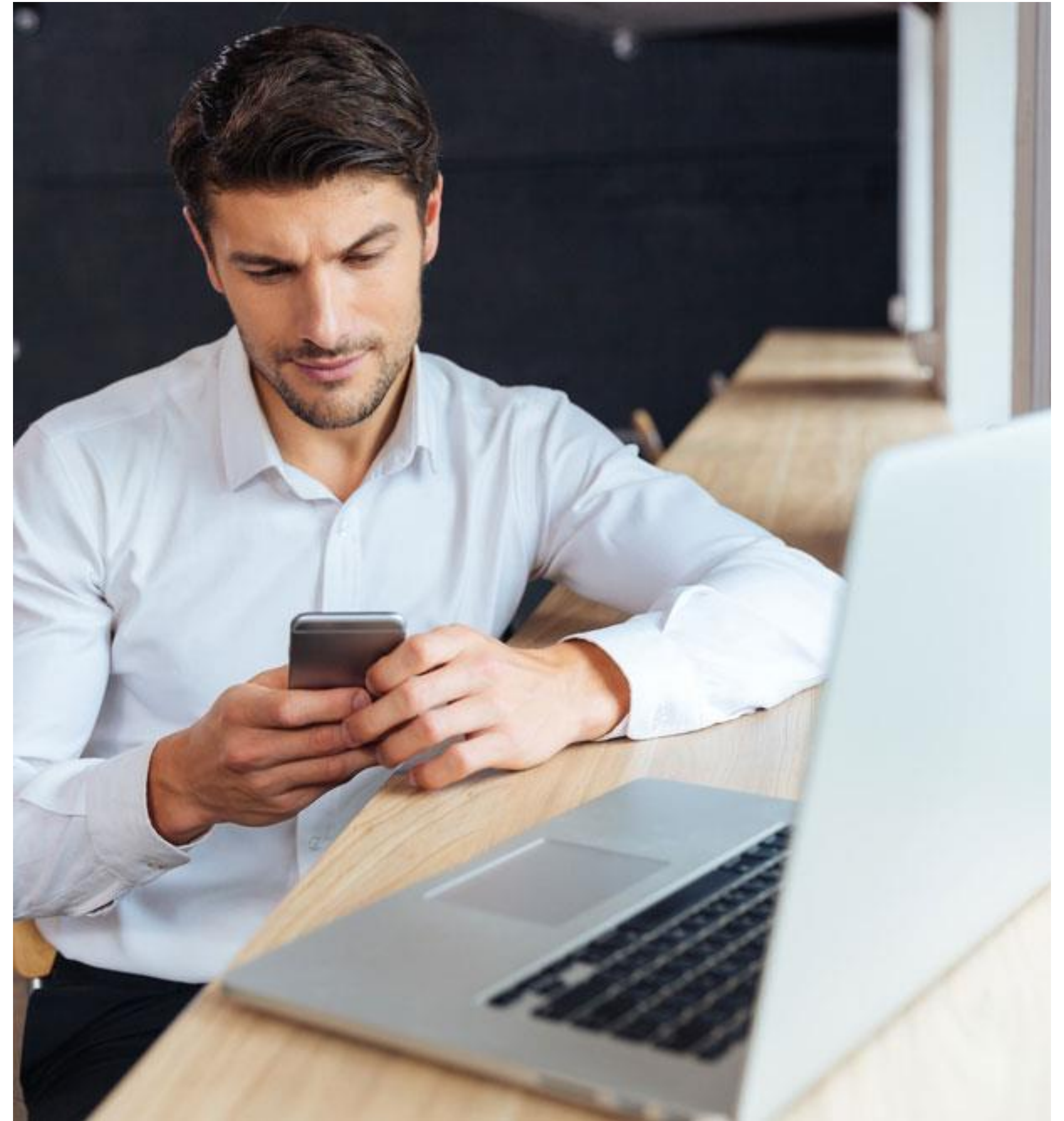
If you were given the choice of using a mobile phone or a desktop or laptop computer (PC or Mac), which would you generally prefer to use for each of these travel planning tasks?



Other planning tasks?

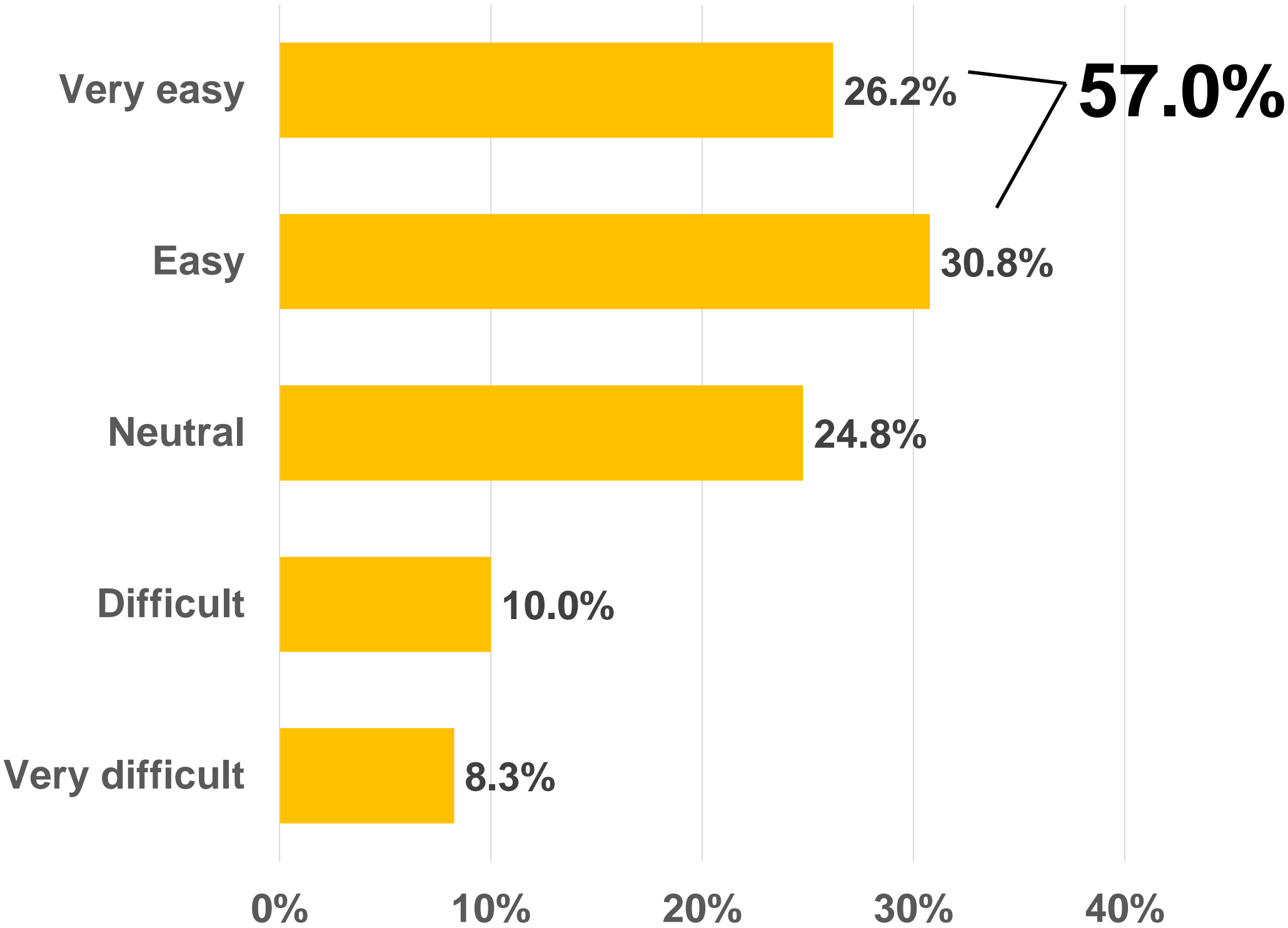
The same story...

- *Buying tickets to activities, attractions or events*
- *Researching hotels or lodging*
- *Booking hotel accommodations*
- *Researching restaurants*
- *Making restaurant reservations*



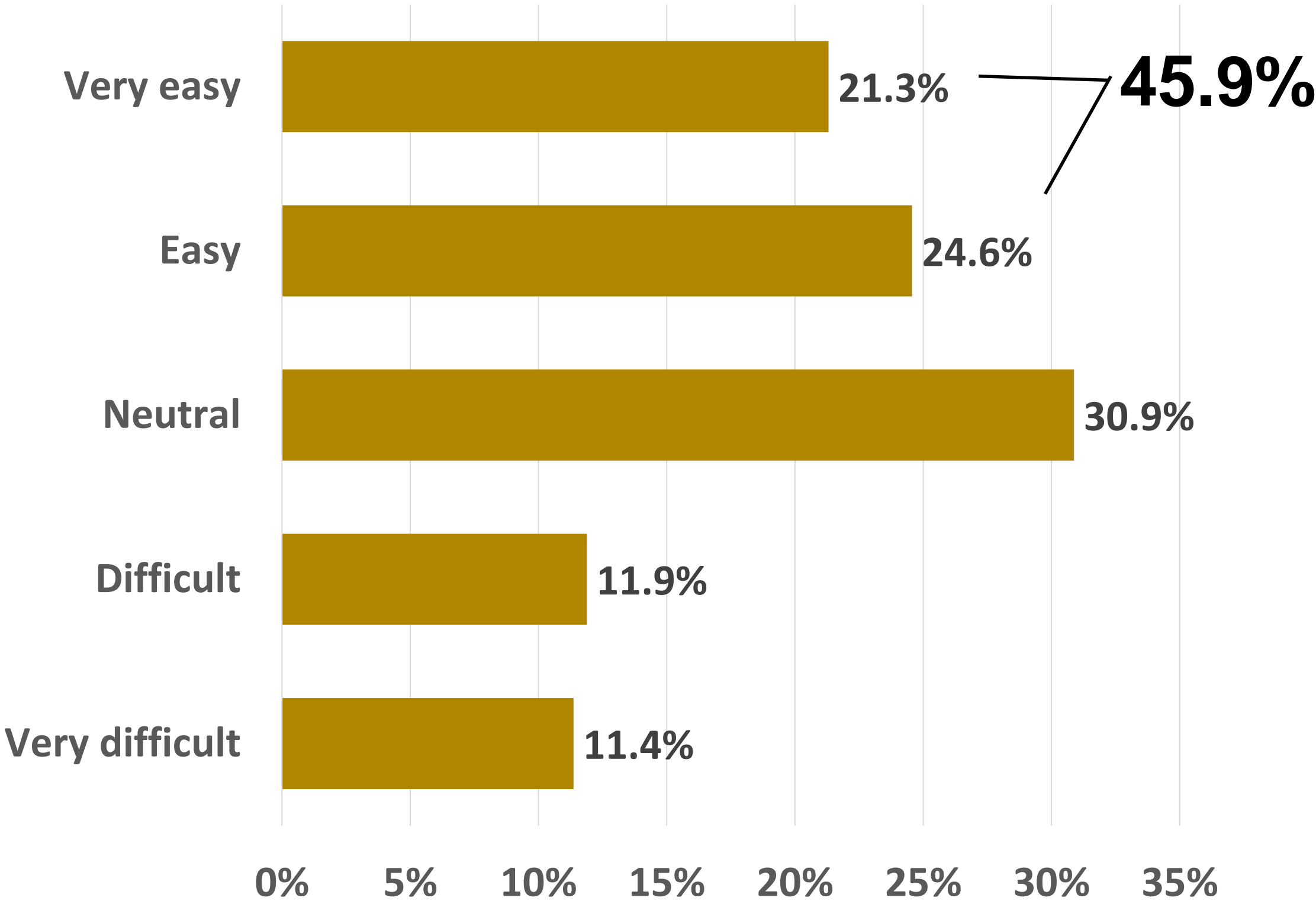
Mobile Phone in Travel: Ease of Use

Trip Planning



In the next two questions please think exclusively about researching your travels PRIOR TO TRAVELING OR PURCHASING a travel product. In your experience, how easy is using your mobile phone to research and find travel information?

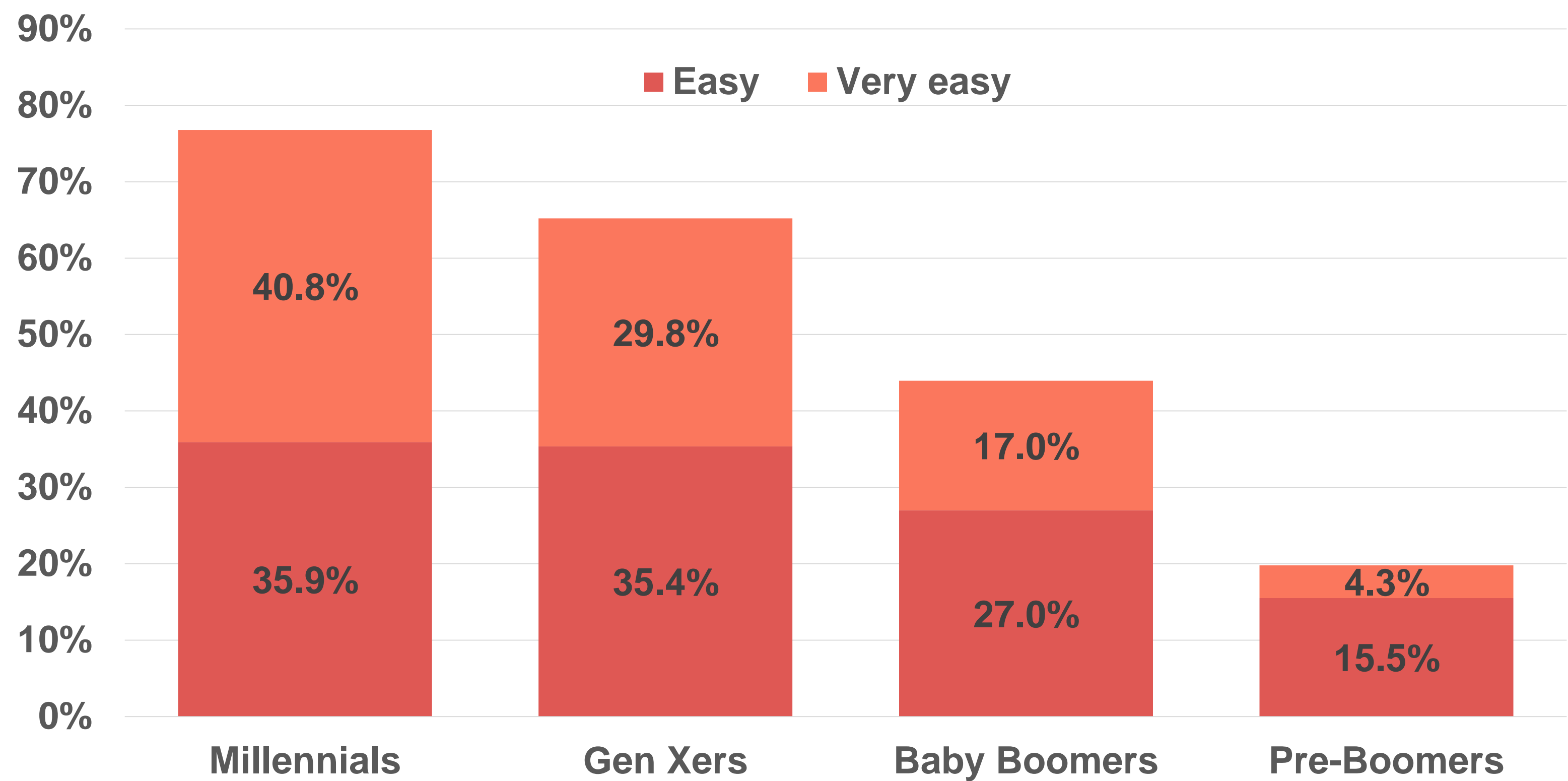
Purchasing Travel Product



In the next two questions please think exclusively about MAKING TRAVEL PURCHASES using your mobile phone. In general, how easy do you find using your mobile phone to purchase or book travel products and services (hotels, flights, etc.)?

Mobile Phone in Travel: Ease of Use

Trip Planning: Generational Perspective



In the next two questions please think exclusively about researching your travels PRIOR TO TRAVELING OR PURCHASING a travel product. In your experience, how easy is using your mobile phone to research and find travel information?

What are we travelers DOING on our phones?

TRIP RESEARCH

Restaurants—45.4%
Hotel or motels—38.8%
Attractions—35.9%
Airlines or airfares—29.0%
Concerts, sporting events,
festivals, etc.—18.1%
Travel packages—14.3%
Peer-to-peer lodging—9.4%
Cruise information—5.9%

TRIP PURCHASES

Hotel or motels stays—22.3%
Attraction tickets—16.3%
Airlines or airfares—14.5%
Restaurant bill—13.1%
Concerts, sporting events,
festivals tickets—11.7%
Peer-to-peer lodging —6.7%
Travel packages—6.0%
Cruise fares/tickets—2.2%

Resources accessed on Mobile for Trip Research

Prices—31.8%

Maps—31.6%

Hotel information—31.2%

Viewing online photos—29.1%

Restaurant/Dining information—26.5%

Deals or special offers—23.6%

Social media content—22.6%

Activities or attractions information—22.4%

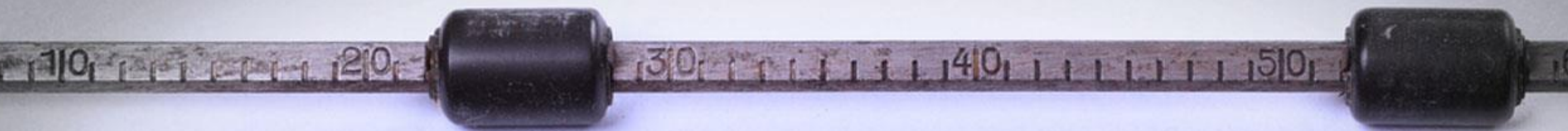
Video – watching online video—20.3%

User-generated content—17.9%

Articles/Itineraries—15.2%

Festivals and special events—11.2%

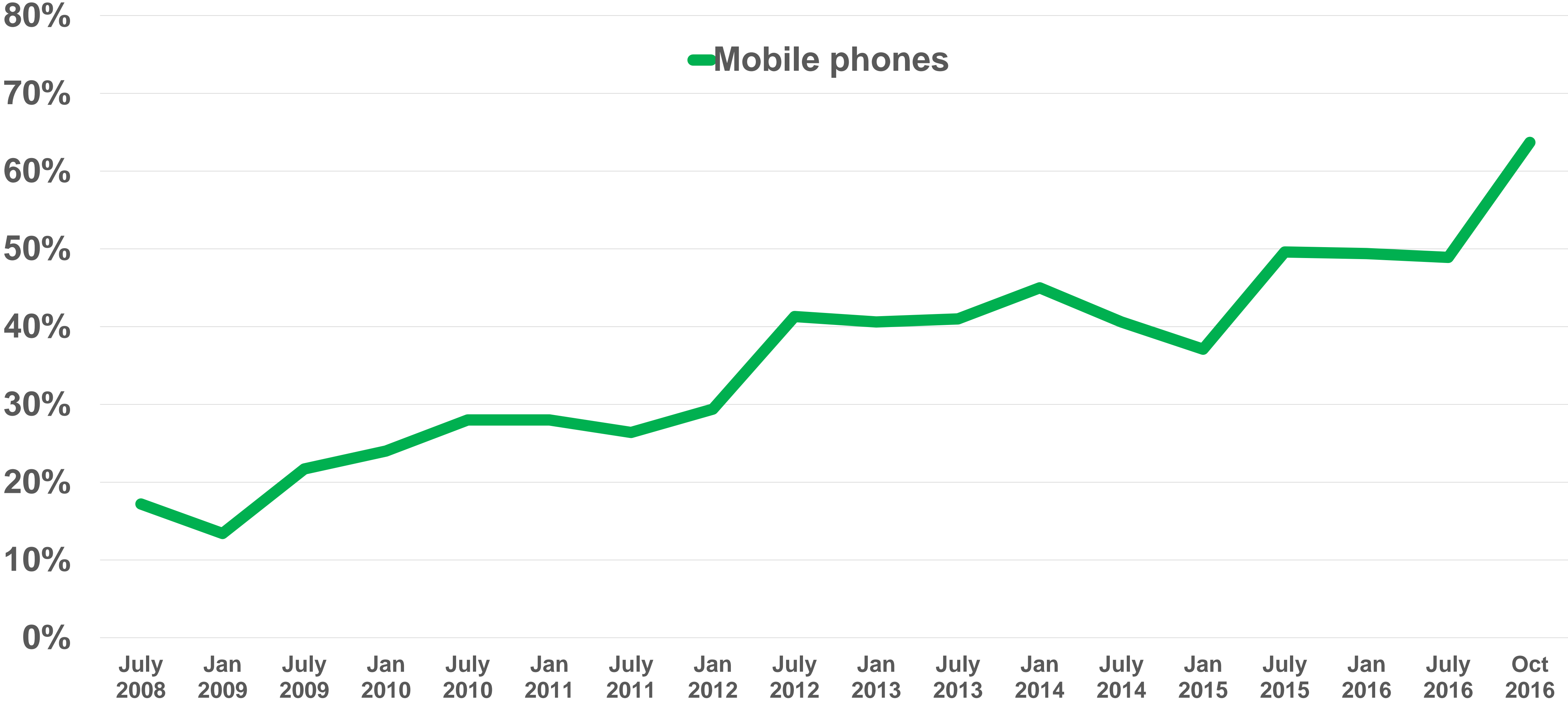




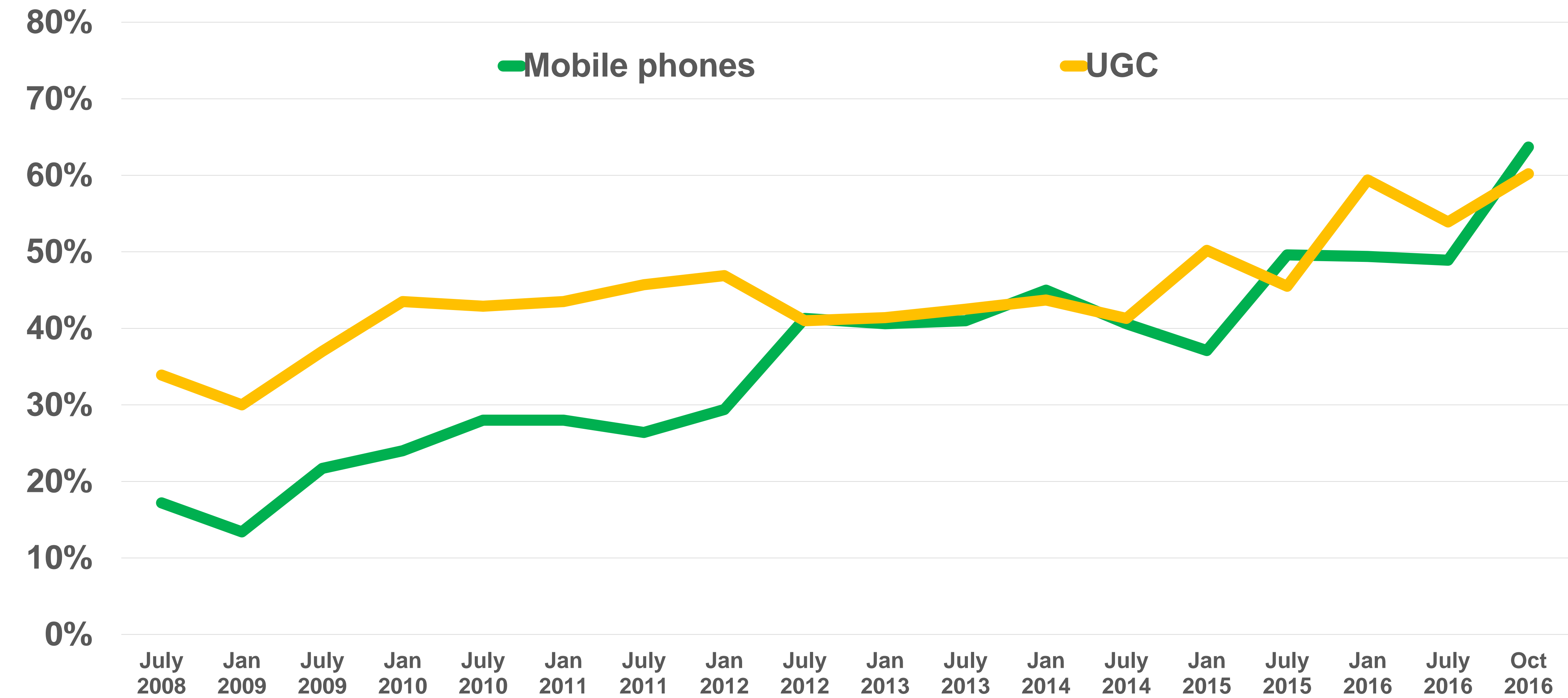
A little perspective



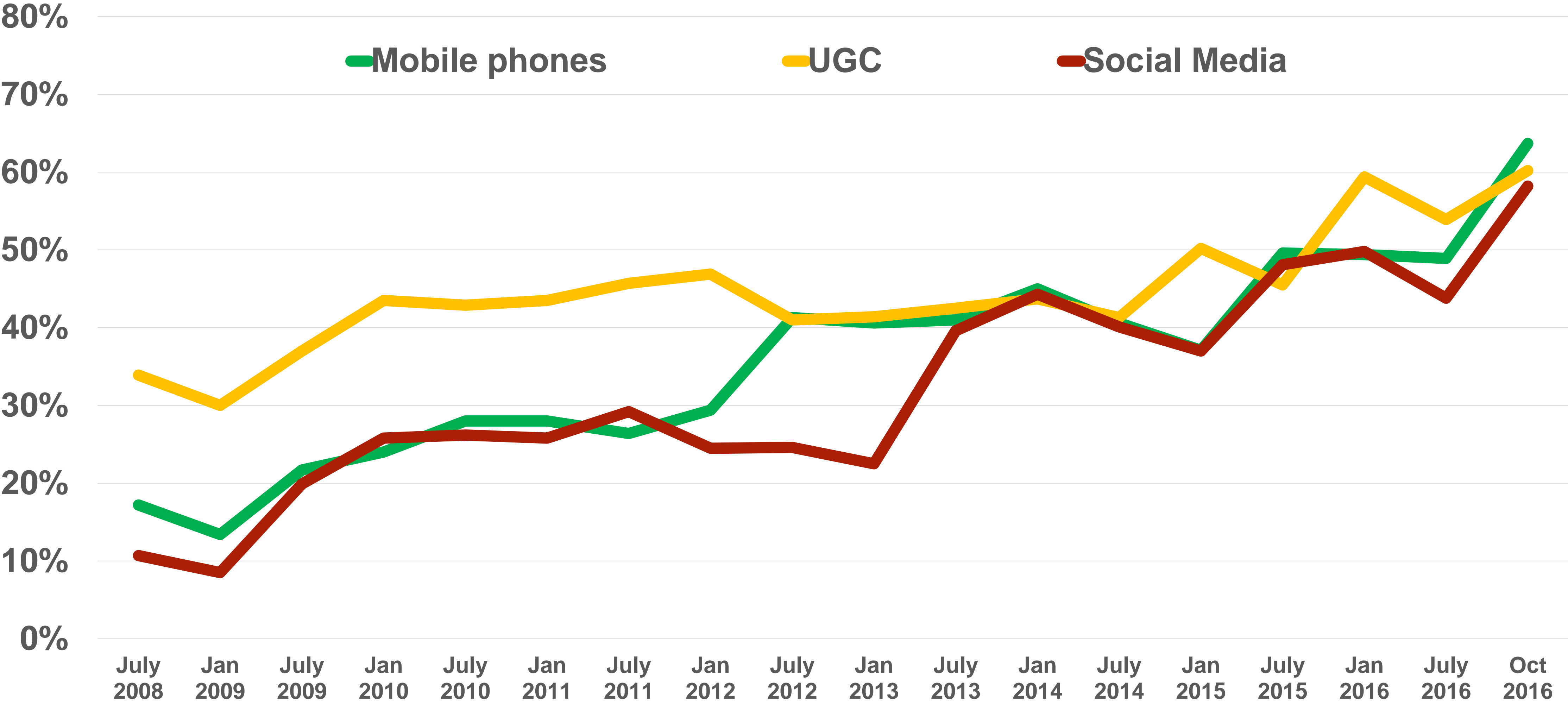
Mobile Phones: Historical Series



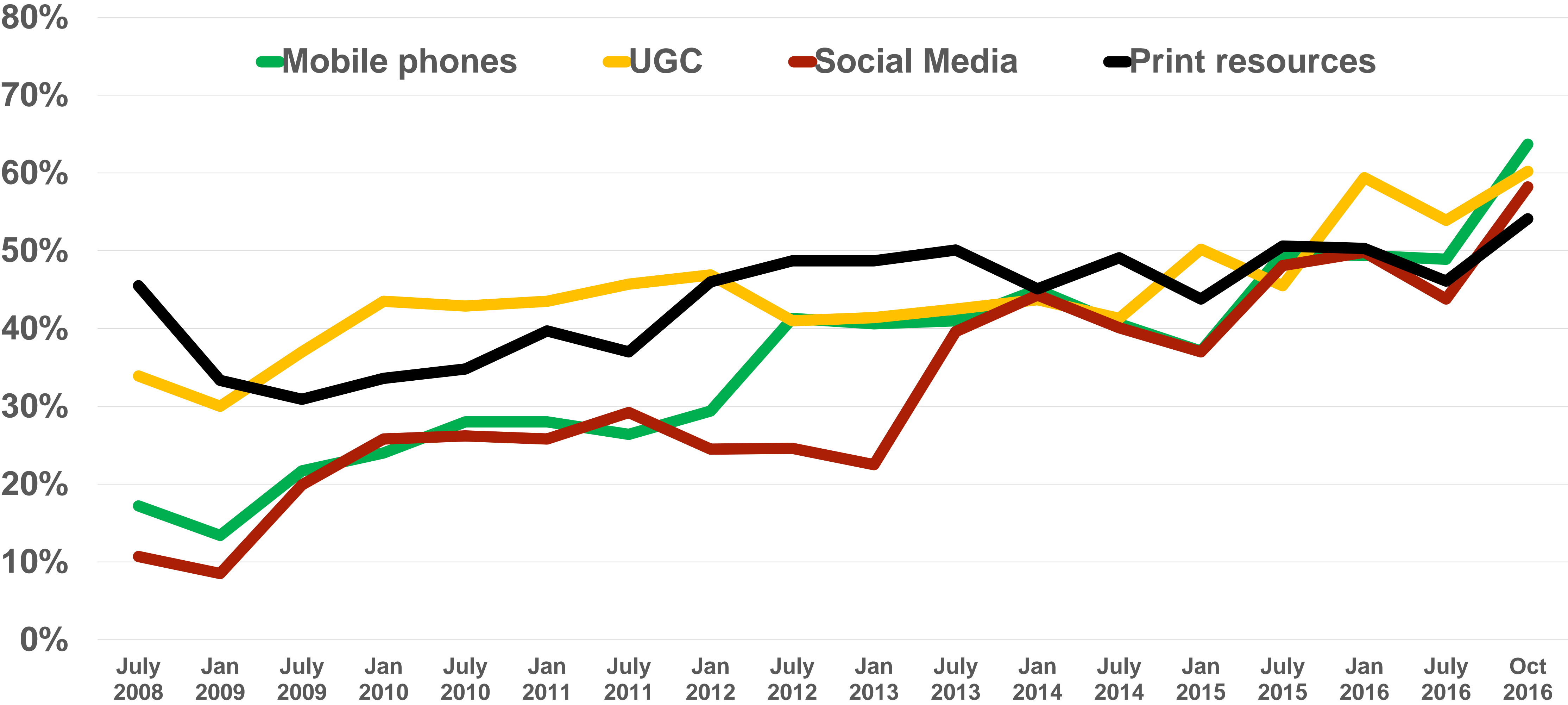
User Generated Content: Historical Series



Social Media: Historical Series



Print Resources: Historical Series



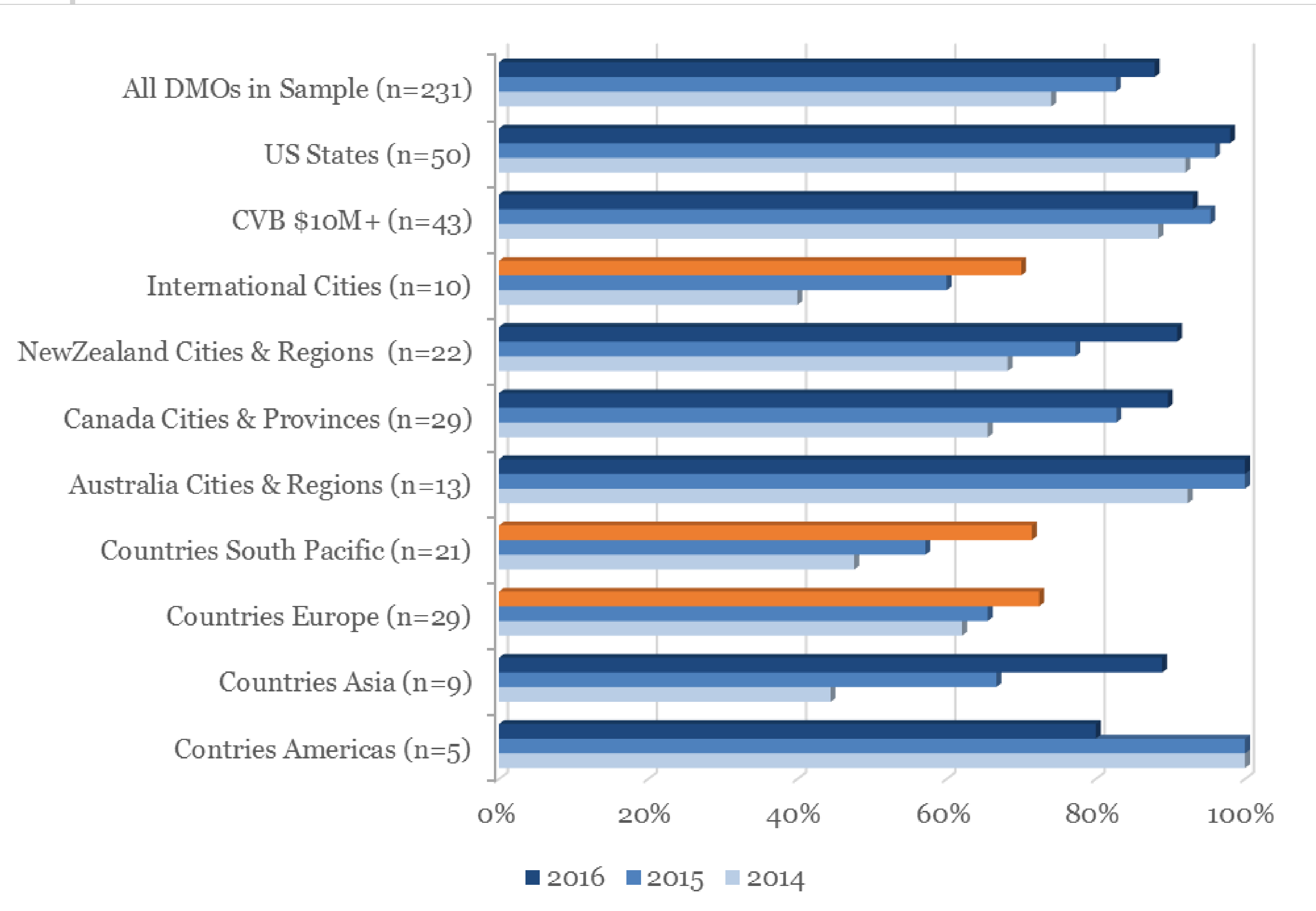
DMO MOBILE READINESS

GLOBAL MOBILE READINESS INDEX

2016 Edition & 2014-2016 Trends



Global Mobile Readiness 2014 to 2016



Mobile App or no Mobile App

Explosive growth in the implementation of responsive websites from 2014 to 2016,

Growth of mobile applications has not occurred.

We are seeing the elimination of mobile apps by many destinations during this time period.



Mobile App or no Mobile App

Factors affecting the usage of mobile apps by destinations include:

- App downloads have declined more than 20% from 2015 to 2016. ¹
- The average American smartphone user downloads zero apps per month...Most people have the apps they want and/or need. ²
- Apps have a high barrier to entry for consumers and require significant investment by users; download app, login to app, and then learn how to use it. ³



1. Downloads may be dipping, but that doesn't mean the app business is dying; Mashable 2016.
2. The App boom is over; Recode, 2016.
3. TripAdvisor advises against mobile apps for its hotel customers; Skift 2013

Next Generation Mobile

5 Practical Best Practices

Make sure your content is accessible

Adapt long scrolls for smaller screens

- Make important information easy to find and reach by adapting the display for smaller screens
- Plan the layout of pages so the sequencing of information makes sense on mobile and desktop
- Shorten lists and allow users to click to load more/expand at certain breakpoints

QuickTime PlayerFileEditViewWindowHelp

NYC14 - New York & Co Cor x

* Lauren's Team - Ongoing x

9 Steps to Achieving a State x

Bermuda Launch x

lara.ortiz@milespartnership.x

Visit Macy's USA | Visit Mac x

www.visitmacysusa.com

☆ ⓘ d B 3 G U M C ⓘ

visit macys

Twitter

Facebook

Menu

Visitor Savings Pass

Top Macy's Locations

Events

What's New

★

WELCOME to the MAGIC of

macys

Experience the

Best of Macy's

Visitor

SAVINGS PASS

VISITOR SAVINGS PASS

Get Your

WHAT'S NEW

LOOK WHO'S

HERE

visit macy's



WELCOME to the MAGIC of
 macy's



Optimize for faster load times, lighter pages

Bandwidth and processing limitations are lessening but still lag behind laptops on wired/Wi-Fi connections

- Caching
- Content Delivery Networks (CDNs)
- Image styles, optimized and responsive images
- Avoid pre-loading / auto play on embedded video. Load preview images, then video on demand.
- *Test loading speeds, check on what may be slowing pages down and if there is an opportunity to optimize, do it (webpagetest.org)*

Make maps easy to use

Common issues: too small to be practically usable, users get stuck inside the map

- Present static maps on screens below a certain size and invite users to click to a full screen version
- Consider whether a click out to Google Maps or other software would be relevant for getting turn-by-turn directions, etc.

visitlondon.com



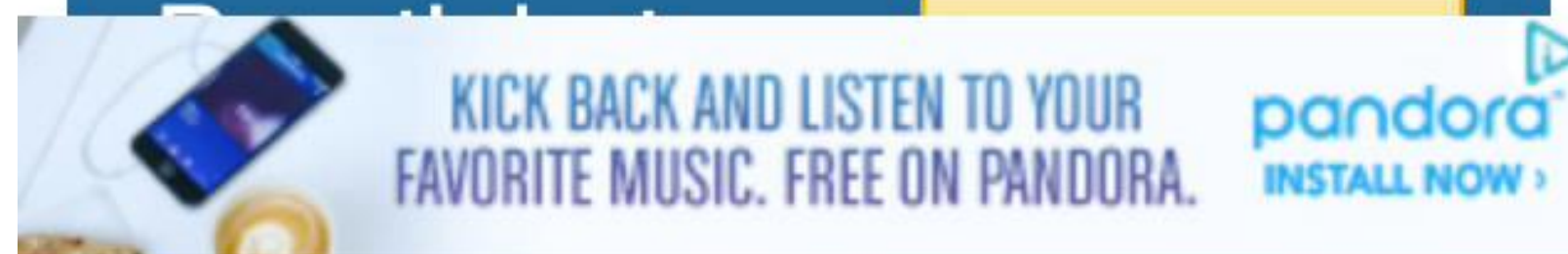
Menu

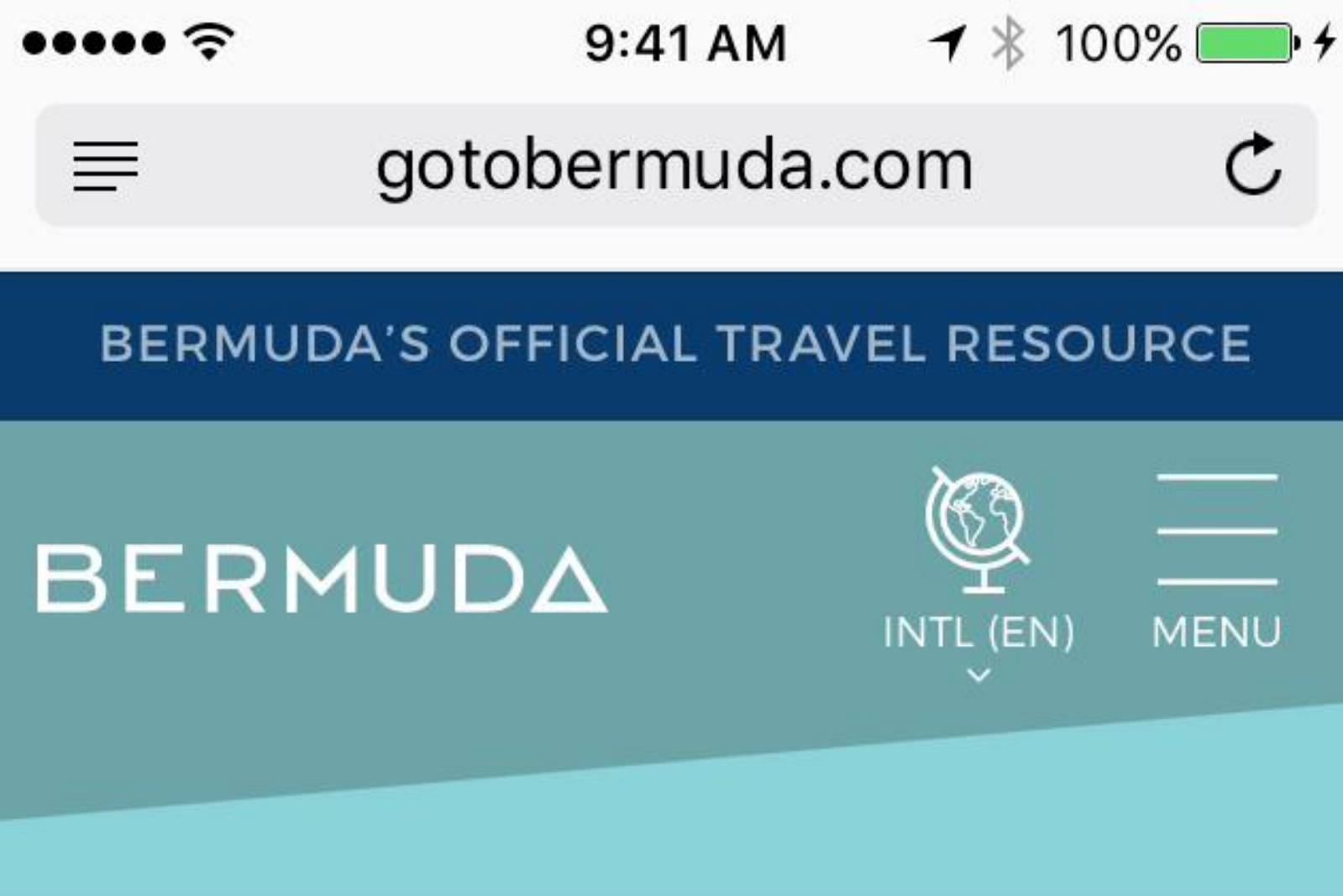
VISITLONDON.COM

OFFICIAL VISITOR GUIDE



Tower Bridge Exhibition





CENTRAL BERMUDA

Coco Reef Resort



Make forms easy to use

Simpler, shorter, more usable forms

Forms are where your visitors go when they are ready to convert

- meetings RFPs
- email signups
- visitor guides
- bookings



Make forms easy to use

Some tips

- Combine fields (Instead of Last Name, Middle Initial, First Name, can you use one Full name field?)
- Create collapsible sections on longer forms and show progress
- Place validation inline instead of reloading on another screen or overlay.
- Align field labels vertically for better fitting on small screens.

virginamerica.com



Travel Advisories: Boston, New York (LGA), and U.S.
DOT Ban of Samsung Galaxy Note 7 Phone [More](#)

[Sign In](#)[CHECK IN](#)[MANAGE](#)

☒ Round Trip ☐ One Way ☐ Multi City

Where would you like to go?

Guests

1 Adult

From

Orlando

To



Personalize

Situational awareness

- Go beyond doing mobile well from a device perspective, and use what you know about the visitor to deliver CONTEXT .



Embrace the tension inherent in designing for responsive

5 Best Practices

1. Design so important information stays close at hand
2. Page speed
3. Touch-friendly maps
4. Touch-friendly, screen-friendly forms
5. Personalization

WHAT'S NEXT FOR MOBILE

Emerging Technologies to Watch

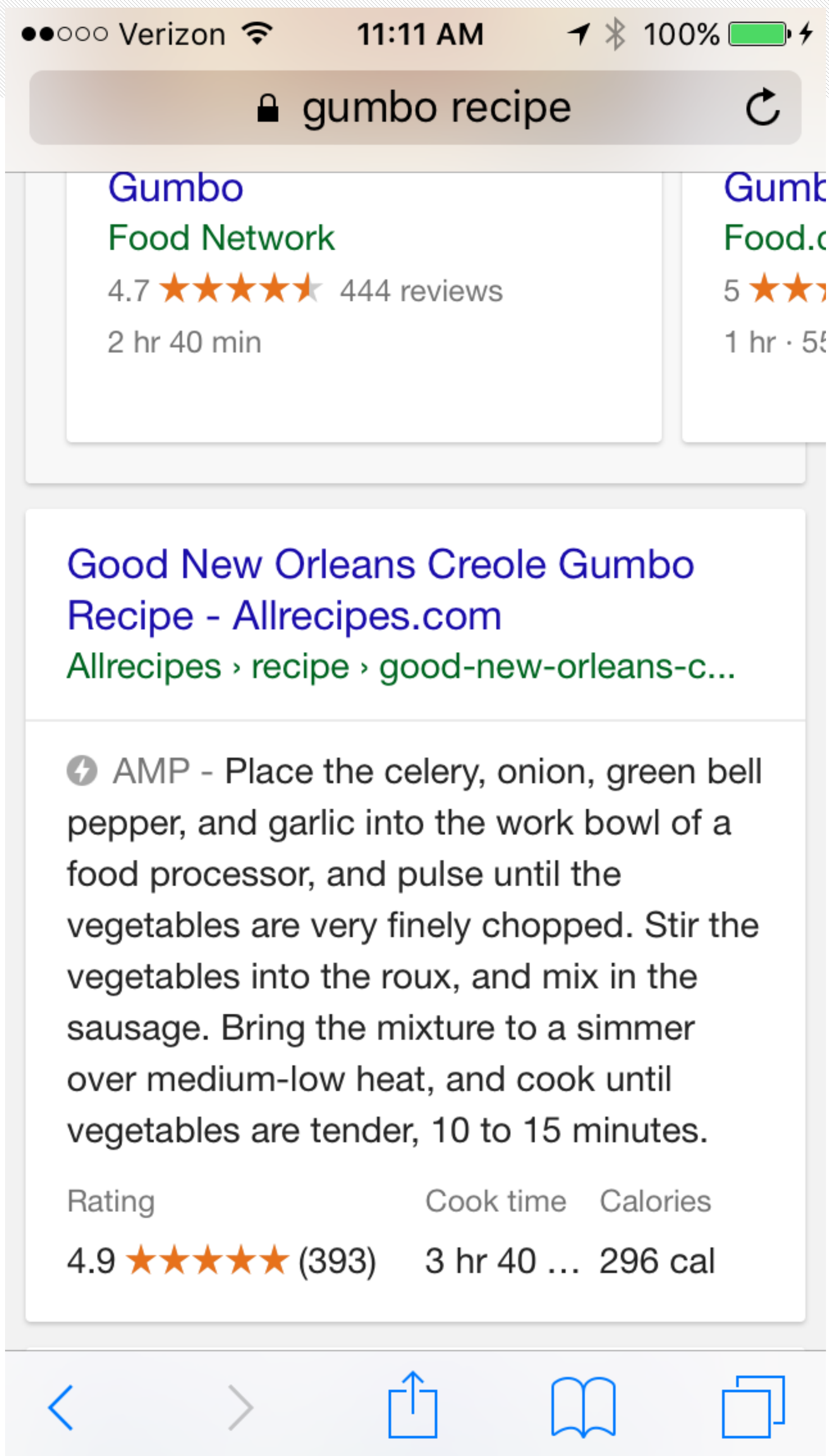


Google's Mobile Initiative

Search giant is driving mobile forward

- Moving to mobile-first index - planned shift to look primarily at mobile content, rather than desktop, when deciding how to rank results
- AMP – Accelerated Mobile Page
 - Pages 4x faster and use 10x less data
 - Open source HTML format
 - Google caches the content

AMP notation in mobile search results



AMP Page



Regular Mobile Page



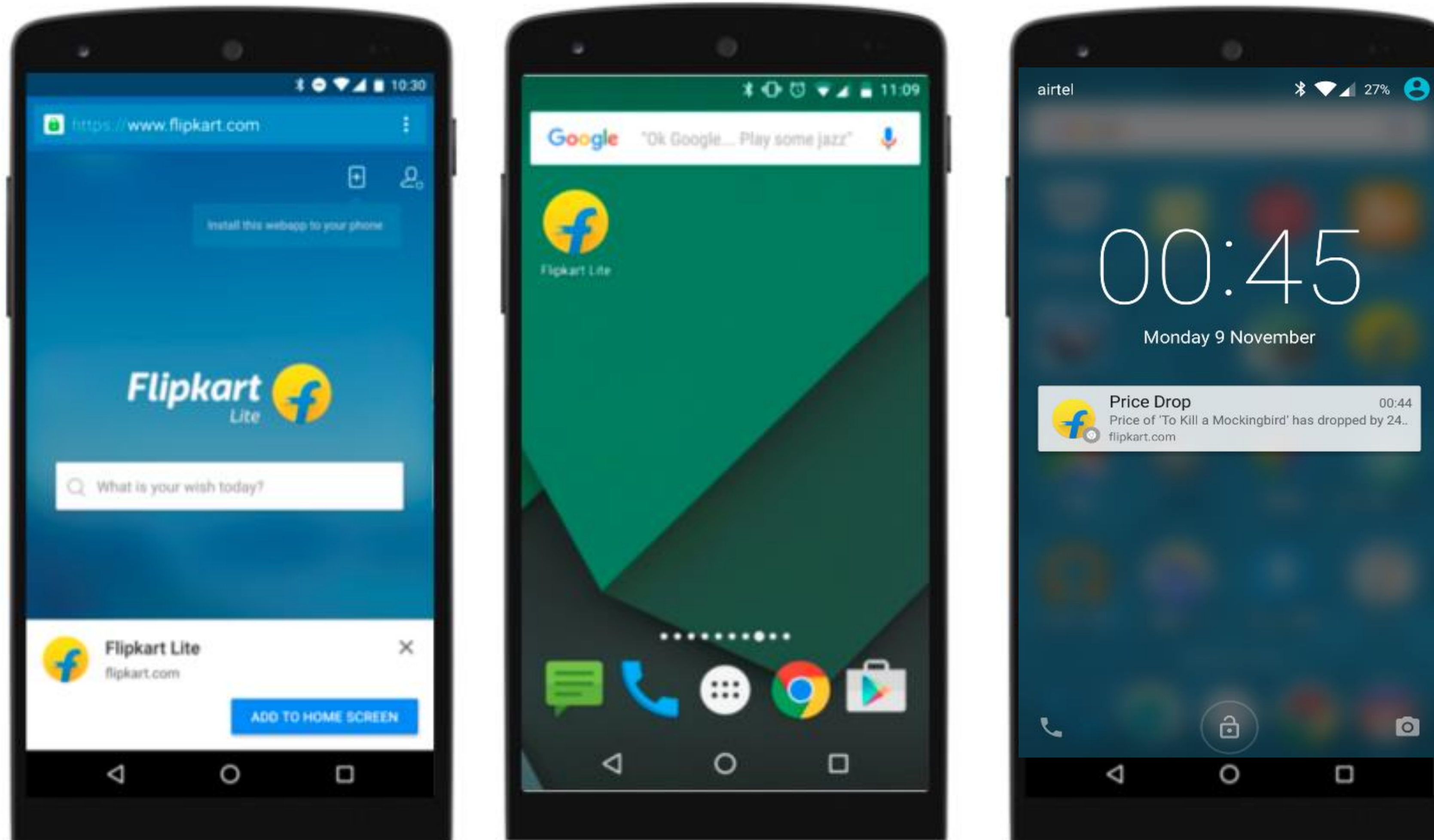
Google's Mobile Initiative

Search giant is driving mobile forward

- PWA – Progressive Web Apps
 - Collection of technologies, Web APIs, and design concepts that work in tandem to provide an app-like experience
 - Send push notifications
 - Save to homescreen
 - Browse offline

Google's Mobile Initiative

Search giant is driving mobile forward



Natural Language Search

Talking to Our Things

- ~40% of searches result in no clicks at all*
- Question format – where/when/how queries

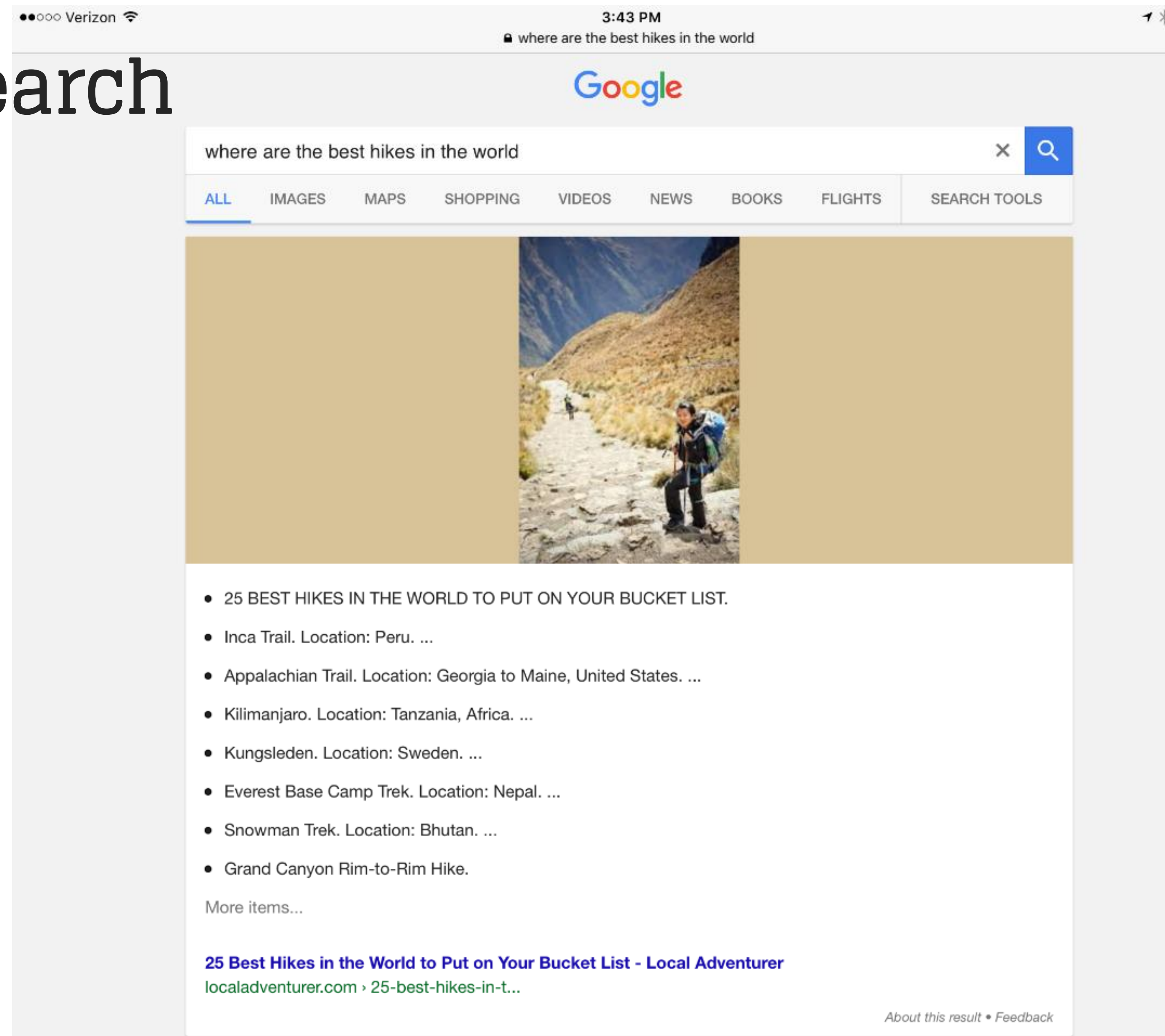


**Rand Fishkin, Moz – MozCon June 2016*

Natural Language Search

Talking to Our Things

- Google Quick Answers
- Schema Markup
 - Identifies your content as objects machines understand
 - “Rich Snippets” featured in search results
- Content Formatting
 - Utilize question/answer format in headings/body copy





Q&A

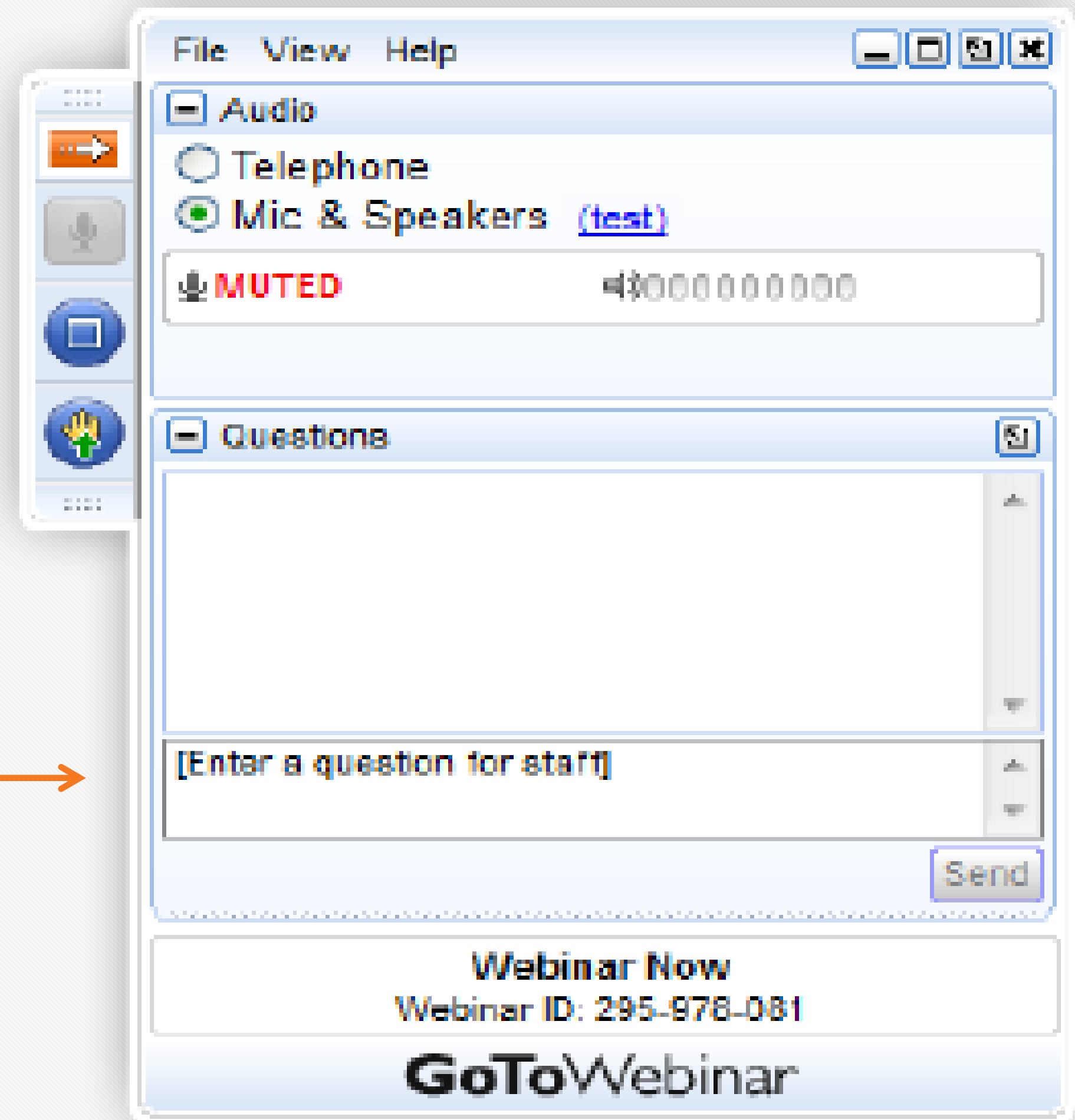
Thank you

miles
PARTNERSHIP

milespartnership.com

QUESTIONS – COMMENTS?

Use the question box



Presentations & Video

<http://budurl.com/GlobalAllStars2016>





RENOWNED INDUSTRY STUDIES

Get industry leading market intelligence with The State of the American Traveler™ and The State of the International Traveler™ reports



INSIGHTS & UPDATES

Mexican International Visitors and Best Practices



LATEST SPEAKING ENGAGEMENT

Keynote address on American travel trends at



CLIENT SUCCESS STORIES

Explore our innovative and effective solutions



Melissa
Bartalos
Content Director

[tourism](#)
[travel](#)

Published 6/13/16

The New Bermu

The little fishhook-shaped island
Guide have recently been introdu

First, let's clear up a few mysteries about
Caribbean as many guess – it's way out
almost 1,000 miles north of Puerto Rico.
to anywhere else. Also, the temps are a t

Our team has learned a lot about the isla
tempting set of unofficial national drinks
lesser-known treasures. Otherworldly ca
Heritage Site (the Town of St. George) ar
or private boat, but you can't rent a car v
Luckily, public transportation is plentiful
to-end in about an hour by car. Bermudi

Next year, Bermuda will be hosting the 3
prestigious sailing event. The Bermuda T
ahead of the high-profile global event, s
rolled out.

Disappear Here

Bermuda's new brand, developed by MM
destinations and avoiding "the sea of sa
Triangle. The most obvious sign of this i
BERMUDA. A little mystery in the inform
embracing a legend that's literally about
Mystique is a key brand element, and the



Kim Palmer
Director of SEO &
Insights

[seo](#)

Published 8/2/16

share this post: [twitter](#) [facebook](#) [linkedin](#) [email](#)

Is Google's Expanding Role in Travel Undermining Organic Traffic Growth for Destinations?

New Review of 26 DMO Websites Reveals a Steady Decline

Strong year-over-year (YOY) organic search traffic growth is expected in an industry as content rich as destination marketing. However, with growing frequency we've heard destinations voice concerns that organic traffic to their sites has been flat, or even down, in recent months.

Of course, we've seen the typical lineup of culprits for such trends such as site update issues, mobile friendliness and aggressive paid search budgets; but just as often we've seen no noticeable change in rank or search volume to account for traffic flux.

In SEO, typically there are a number of small factors that add up to a big search traffic difference, rather than a single, clear issue. Such is likely the case behind this downward trend in organic traffic growth. While there were a number of [major algorithm updates in 2015](#), we've been keeping an even closer eye on Google's changes in search result formats in both travel planning and travel booking. Just Google "MarketName destinations" or "places to visit in MarketName" on your phone and you can see the extent to which the search giant is surfacing its own destination content before linking to DMO sites. In his [recent post on the latest State of the American Traveler report](#), my colleague Chris Adams cited that more than half of travelers were either interested or very interested in using Google-curated content to research leisure destinations.

Being the curious folks we are here at Miles, we compiled the organic traffic of 26 destination websites nationwide from 2013 through the first half of 2016. While there was a healthy mix of ups and downs each year, the totals point to a trend that supports the anecdotal evidence we've heard to date.

In 2014, the total organic traffic to these destination sites grew by 37% over 2013. In 2015, YOY growth dropped to only 17%, and in the first half of 2016 that growth has slowed to only 10%

Thank You!



Chris Adams

+1 303 842 3394

Chris.Adams@MilesPartnership.com
Social: KiwiColorado



Erin Francis - Cummings

+1 415 716 7983

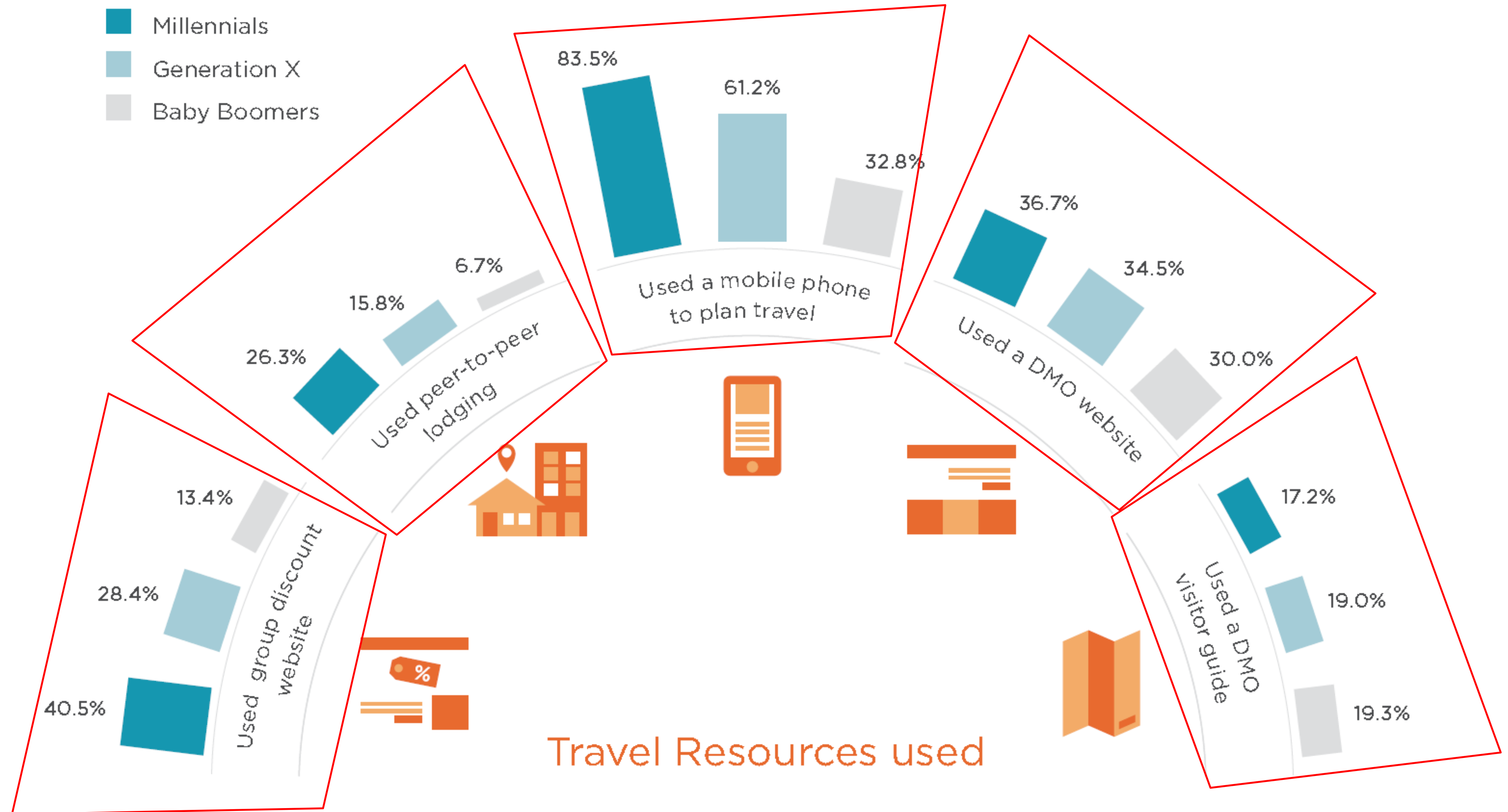
Erin@DestinationAnalysts.com
Social: erincummings31

Travel Planning Resources Used (Past 12 Months)



KEY:

- Millennials
- Generation X
- Baby Boomers



in the last 12 months

