

A person is sitting on a pebbly beach, seen from behind, using a laptop. They are wearing a blue jacket and a backpack. The ocean is in front of them, with a small boat visible in the distance. The sky is a mix of blue and orange, suggesting sunset or sunrise. A rocky cliff is on the left side of the frame.

THE STATE OF THE AMERICAN TRAVELER: TECHNOLOGY EDITION

MAY 16, 2018

With You



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Guest Presenter



CA Clark

VP - UX & Optimization

Miles Partnership

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Destination  Analysts

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FEATURED SESSION: “DMOs’ Evolving Role in Community and Economic Development” with Paul Ouimet, Managing Director, DestinationNEXT Initiative



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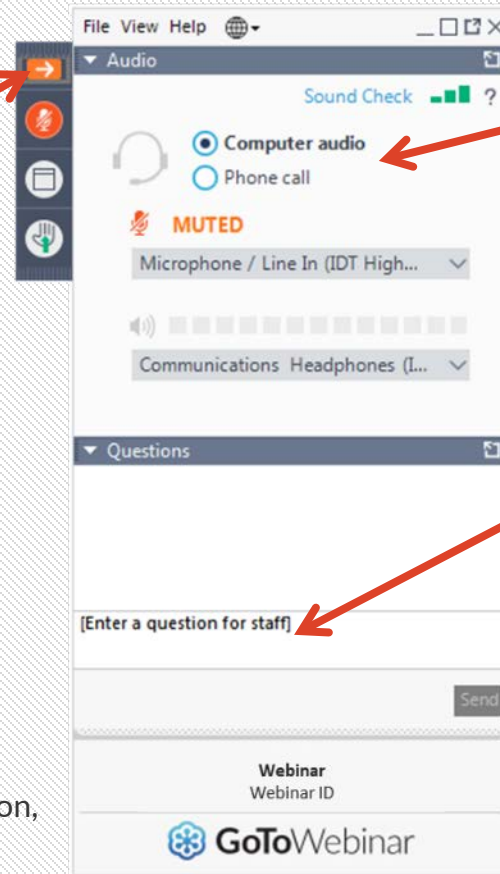
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Open or close the control panel with the orange button.

Choose to use computer audio or dial in by phone.

Have a question? Ask it here.

A man in a red and blue plaid shirt is wearing a white and black VR headset, looking forward. The background is a blurred cityscape with a large suspension bridge.

Agenda

1. Digital Influencers
2. Traveler Technology Adoption
3. “Top Tech” Interest & Usage
4. Spotlight Segment: New Technology and Trends in Street View
5. Current Traveler Sentiment



The State of the American Traveler

TECHNOLOGY EDITION

David Reichbach
Director of Analytics and Data Security
Destination Analysts

THE STATE OF THE AMERICAN TRAVELER

TECHNOLOGY EDITION



The State of the American Traveler

- Conducted since 2006
- Online survey
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000+ American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- Today: April 2018 results



DIGITAL INFLUENCERS



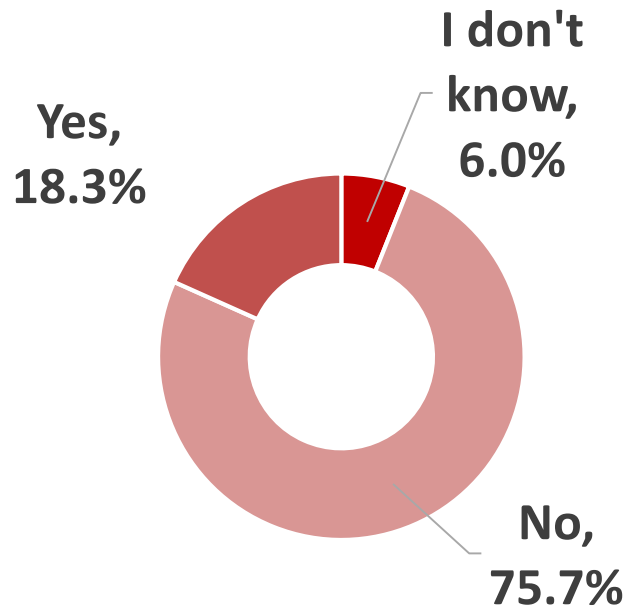
DEFINITION: A “DIGITAL INFLUENCER”

is a person who has established credibility online and who shares their opinions and experiences with a large audience. This can include bloggers, travel writers, YouTube personalities and/or persons with large followings on social media (Twitter, Instagram, Facebook, Pinterest, etc.)



Digital Influencers

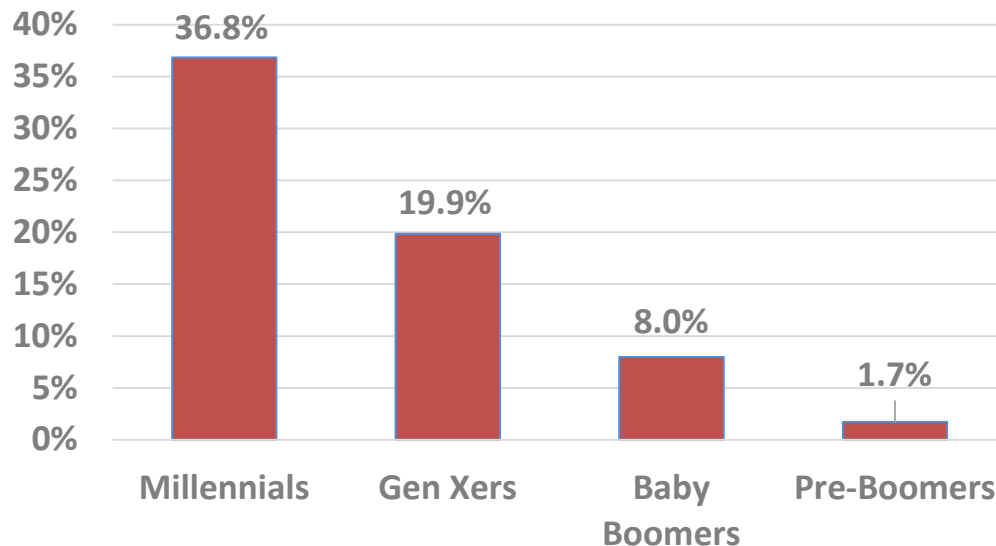
Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any leisure travel?



Base: All respondents. (2018 = 2,021 completed surveys.)

Digital Influencers

Question: In the past 12 months, have you used the opinions of a **DIGITAL INFLUENCER** to help plan any leisure travel?



Base: All respondents. (2018 = 2,021 completed surveys.)

Digital Influencers

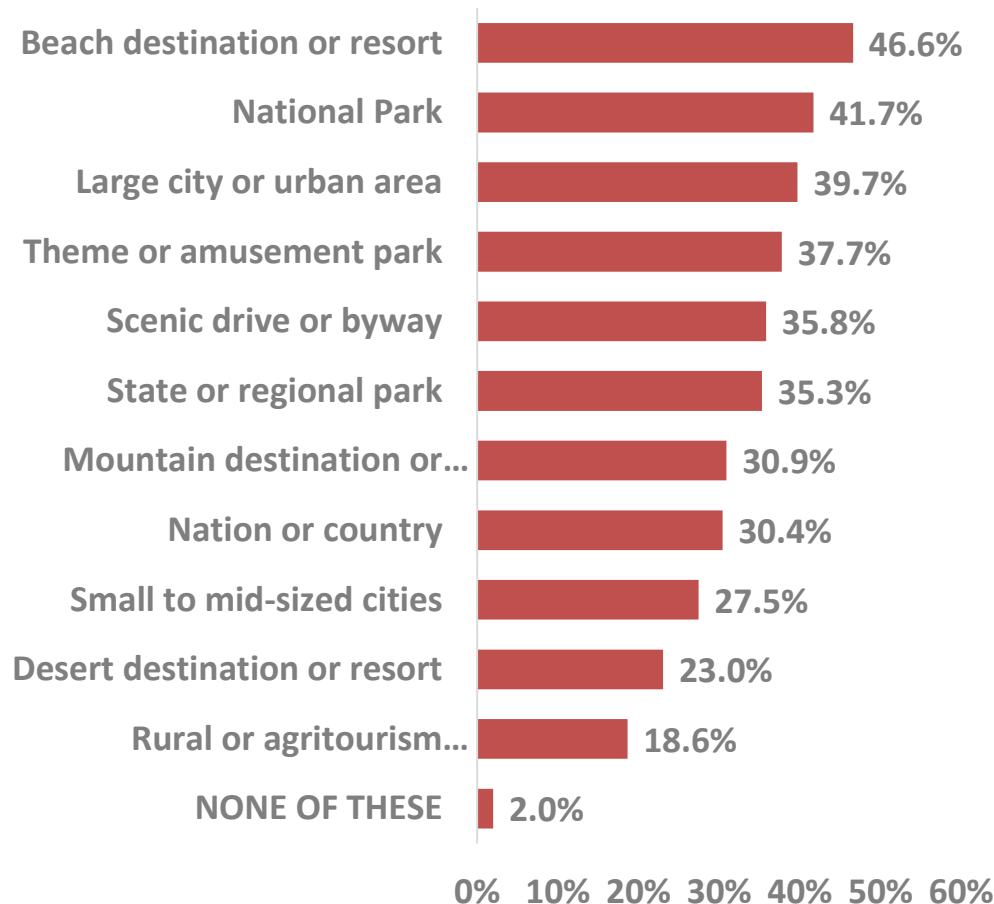
Question: Which of the following decisions were effected by the posts of DIGITAL INFLUENCERS?



Base: All respondents. (2018 = 2,021 completed surveys.)

Digital Influencers

Question: Which of the following types of places or destinations did DIGITAL INFLUENCERS inspire you to visit?



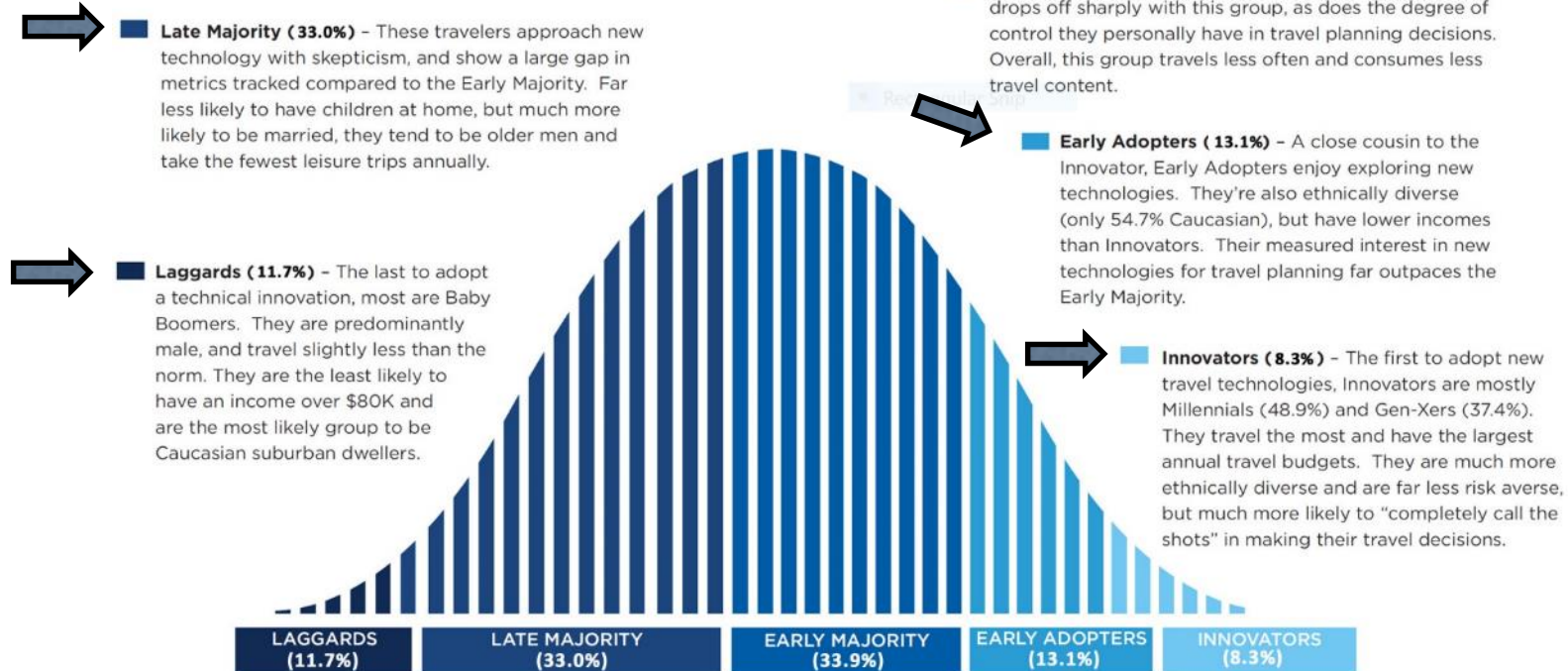
Base: All respondents. (2018 = 2,021 completed surveys.)



TECHNOLOGY ADOPTION

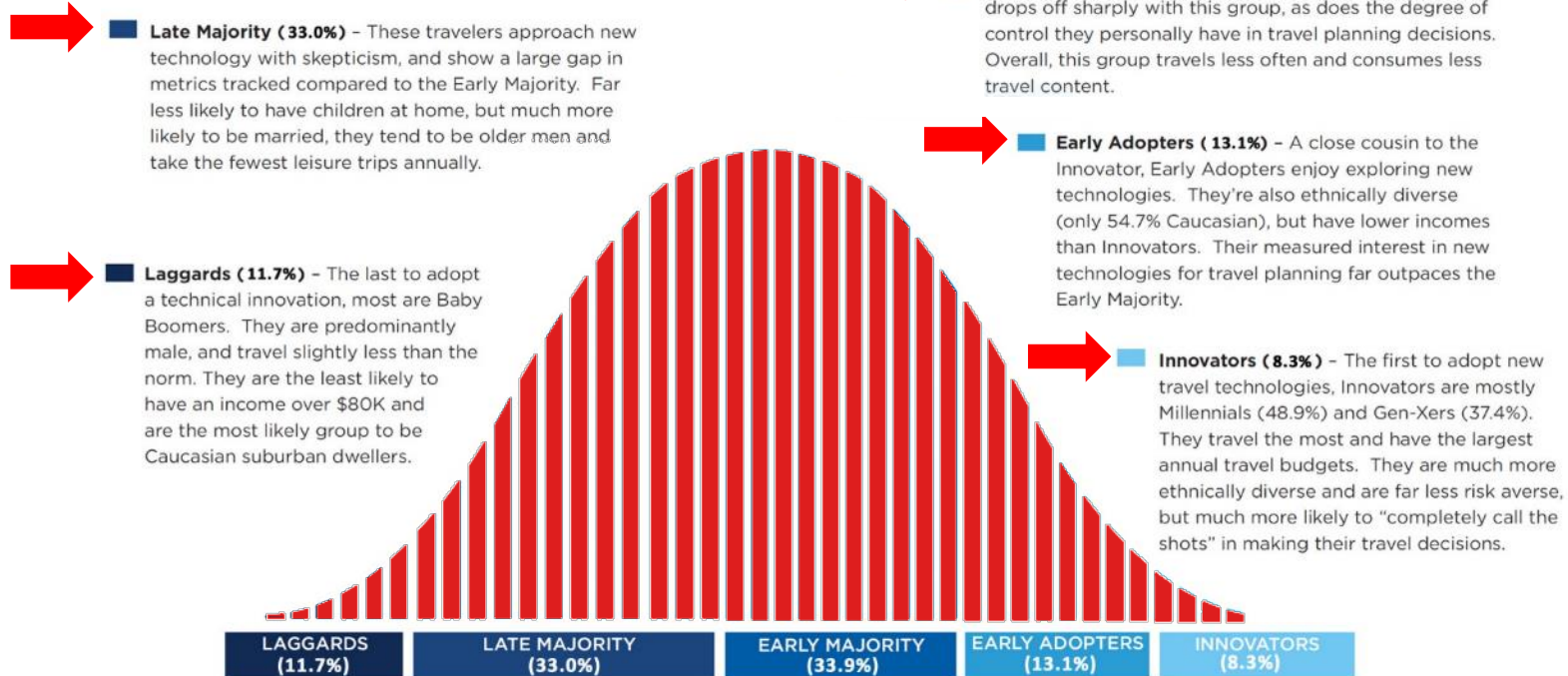
Technology Adoption Amongst Travelers 2018

The Five Segments of Traveler Technology Adopters



Technology Adoption Amongst Travelers 2018

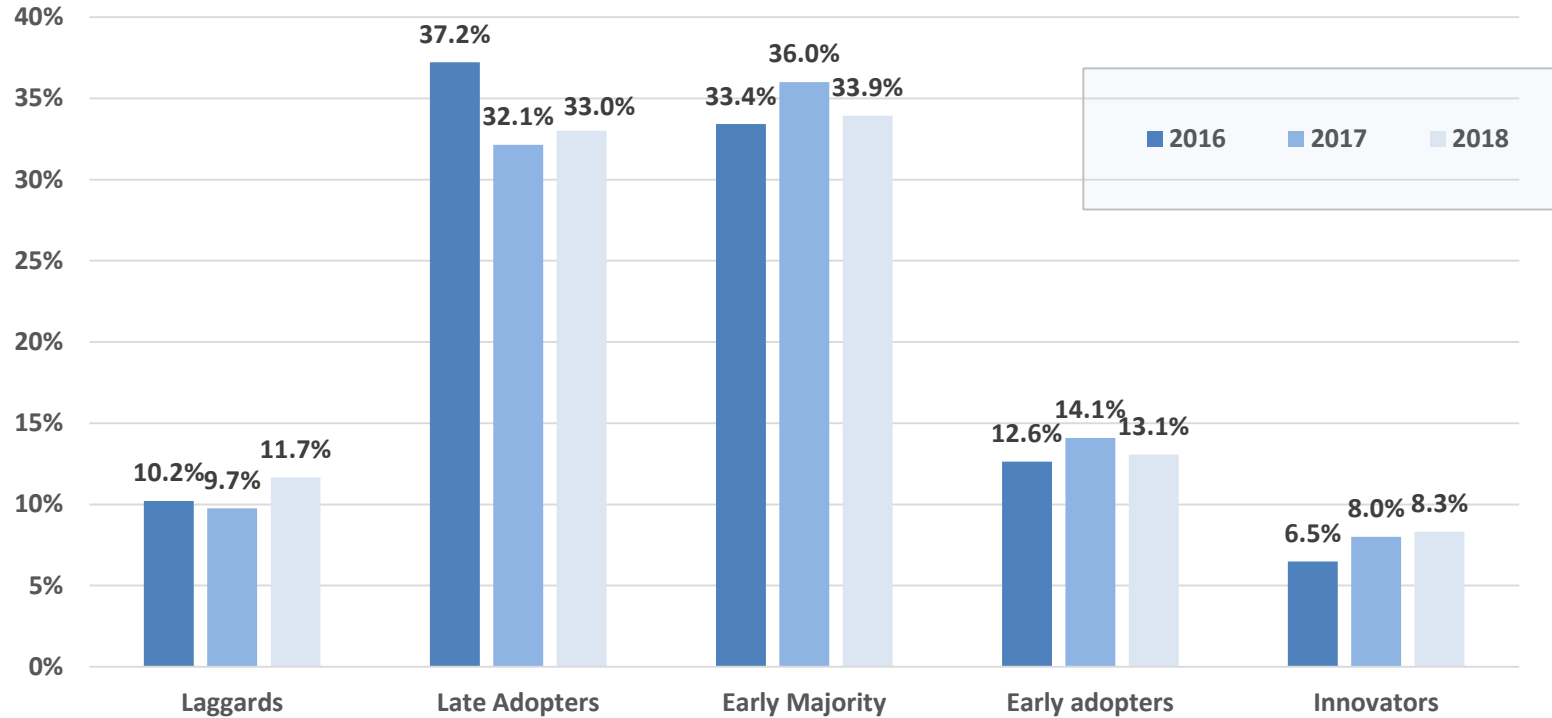
The Five Segments of Traveler Technology Adopters



Our Model – 4 Components, 5 Questions

- **Enthusiasm for technology adoption**
- **Interest in keeping up with latest in travel tech**
- **Expectations for future benefits of technology (for travel)**
- **Adoption of the most ubiquitous travel technologies into their lives**
 - **Engagement with others using social media (proxy - use)**
 - **Intensity of use of mobile phones in planning (proxy - use)**

Technology Adoption Amongst Travelers

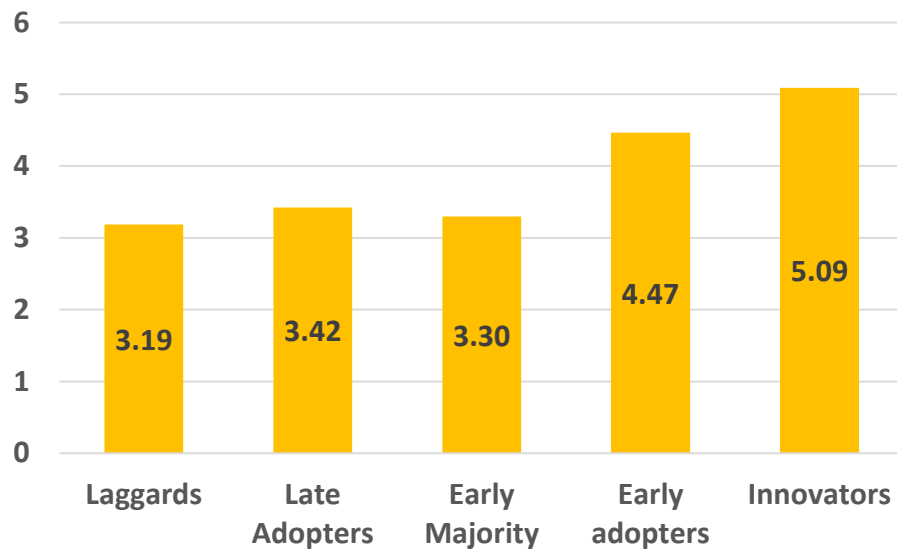


WHY EARLY ADOPTERS AND INNOVATORS ARE WORTH GOING AFTER



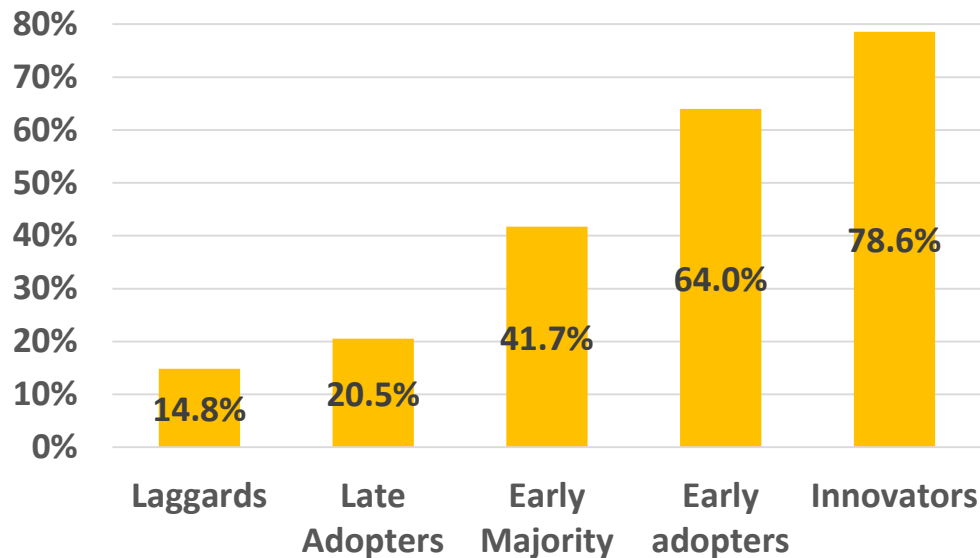
#1 – They Travel More

Leisure Trips Taken in the Past 12 Months



Base: All respondents. (2,021 completed surveys.)

#2 – They're Gung-ho to Travel More

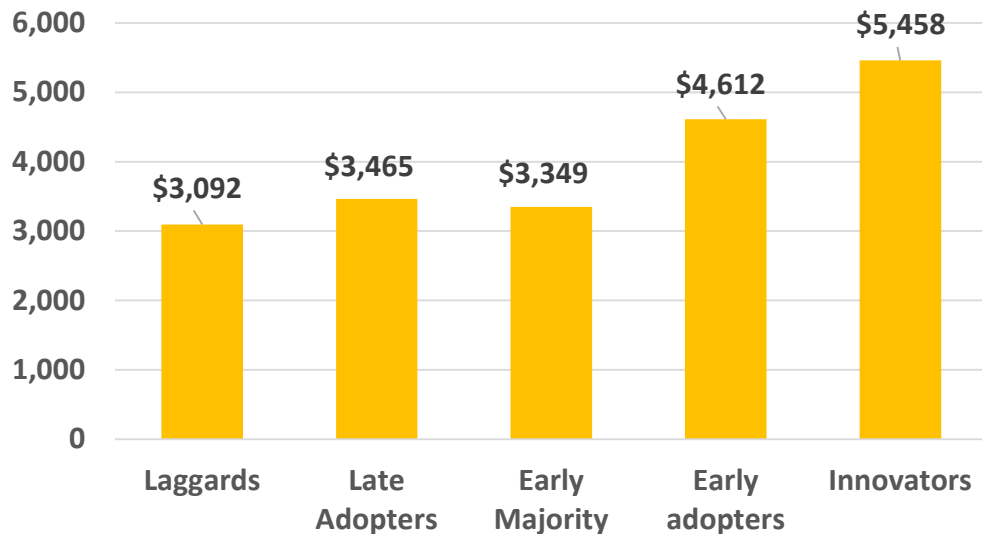


Base: All respondents. (2,021 completed surveys.)

**Expect to Travel
More in Next 12
Months**

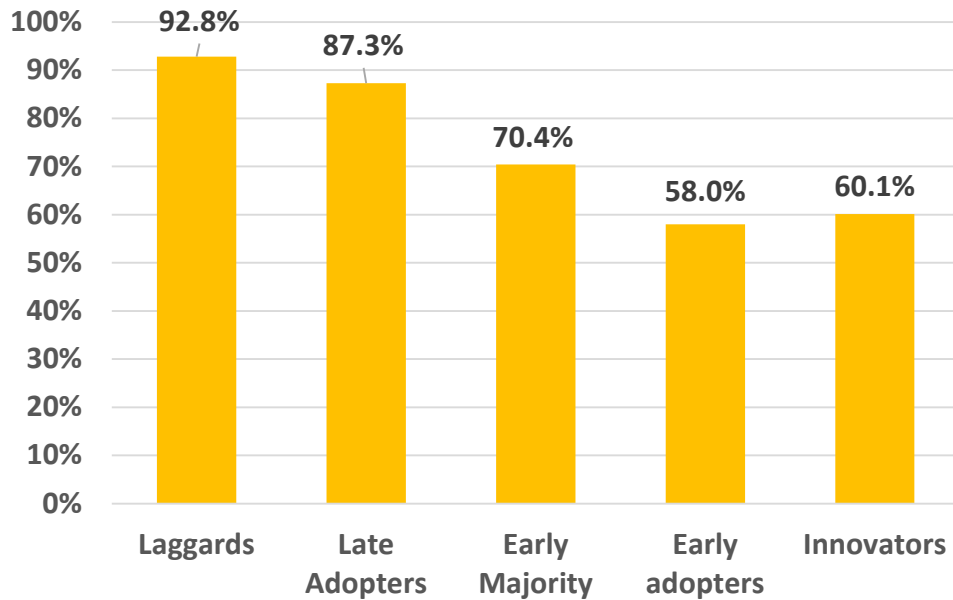
#3 – They're Big Spenders

**Maximum
Annual Travel
Budget**



Base: All respondents. (2,021 completed surveys.)

#4 – They're a Diversity Marketer's Dream

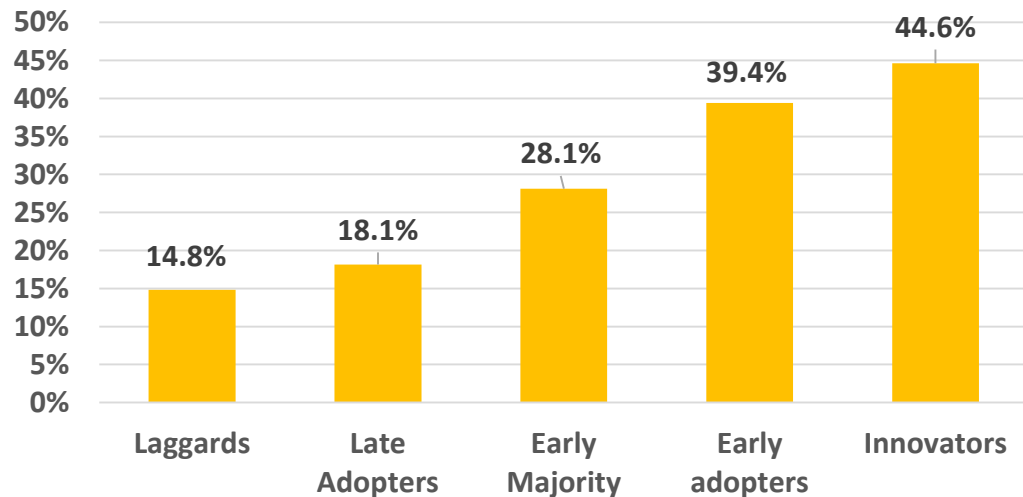


Base: All respondents. (2,021 completed surveys.)

Percent
Reporting as
Caucasian

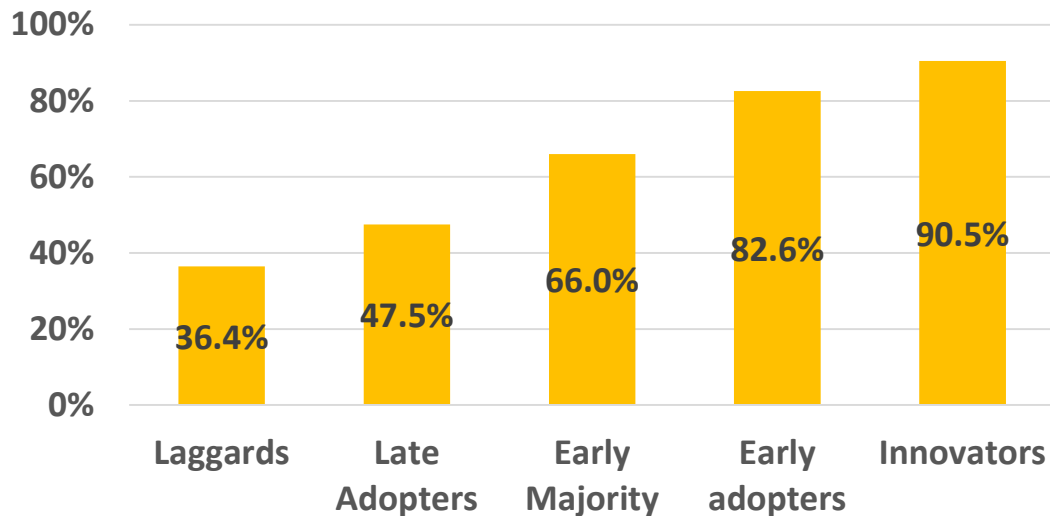
#5 – They're Concentrated in Urban MSAs

Live in an
Urban Area



Base: All respondents. (2,021 completed surveys.)

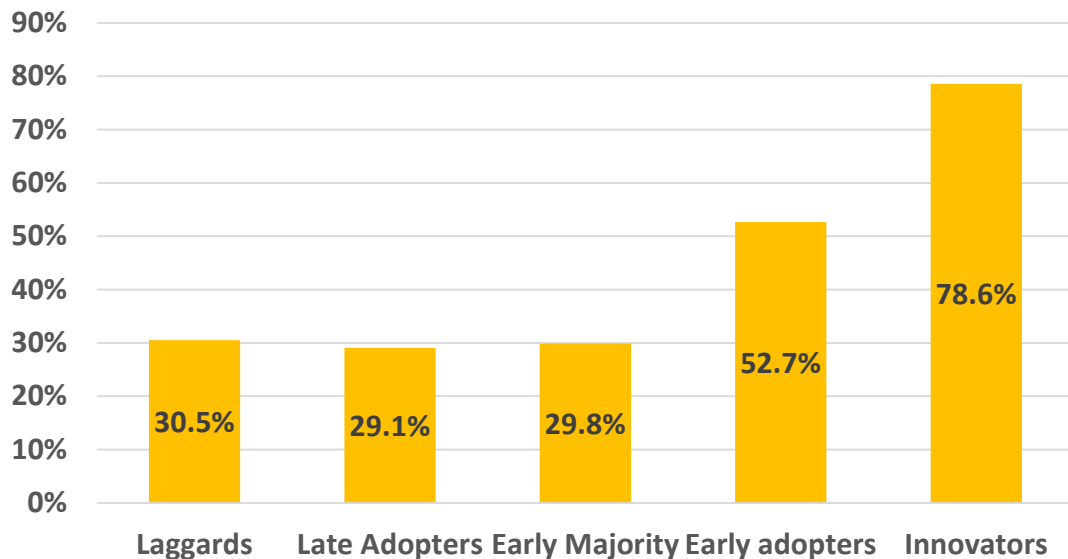
#6 – They're Connected to Other Travelers



Base: All respondents. (2,021 completed surveys.)

**DESTINATION INFLUENCED
BY WORD OF MOUTH (FOR
A TRIP THEY WANT TO
TAKE THIS YEAR)**

#7 – They're People You Want in Your Destination!



Base: All respondents. 2,021 completed surveys.

**Generally Consider
Themselves to be
Happy**

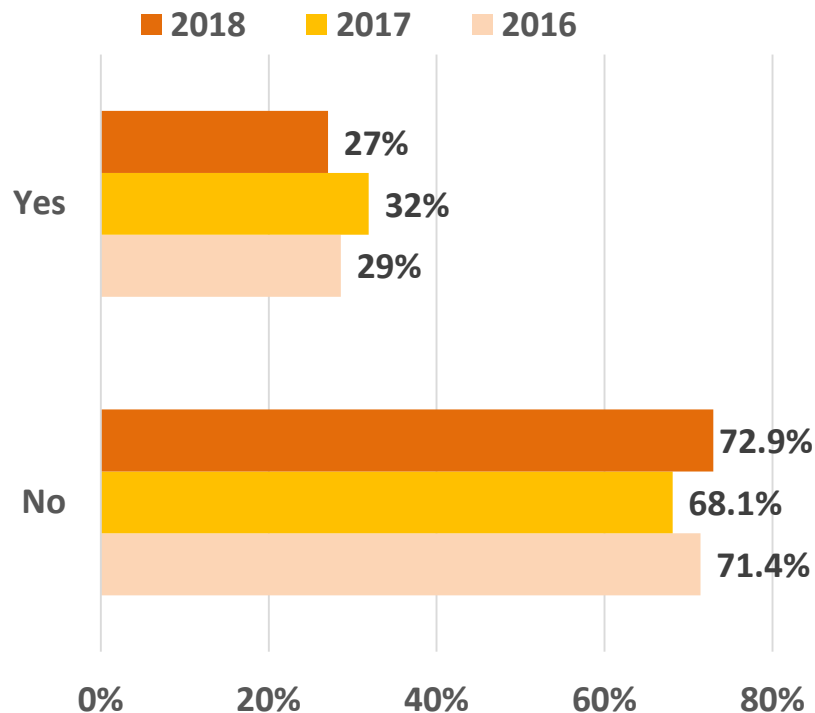
Top Tech



**Interest
& Usage**

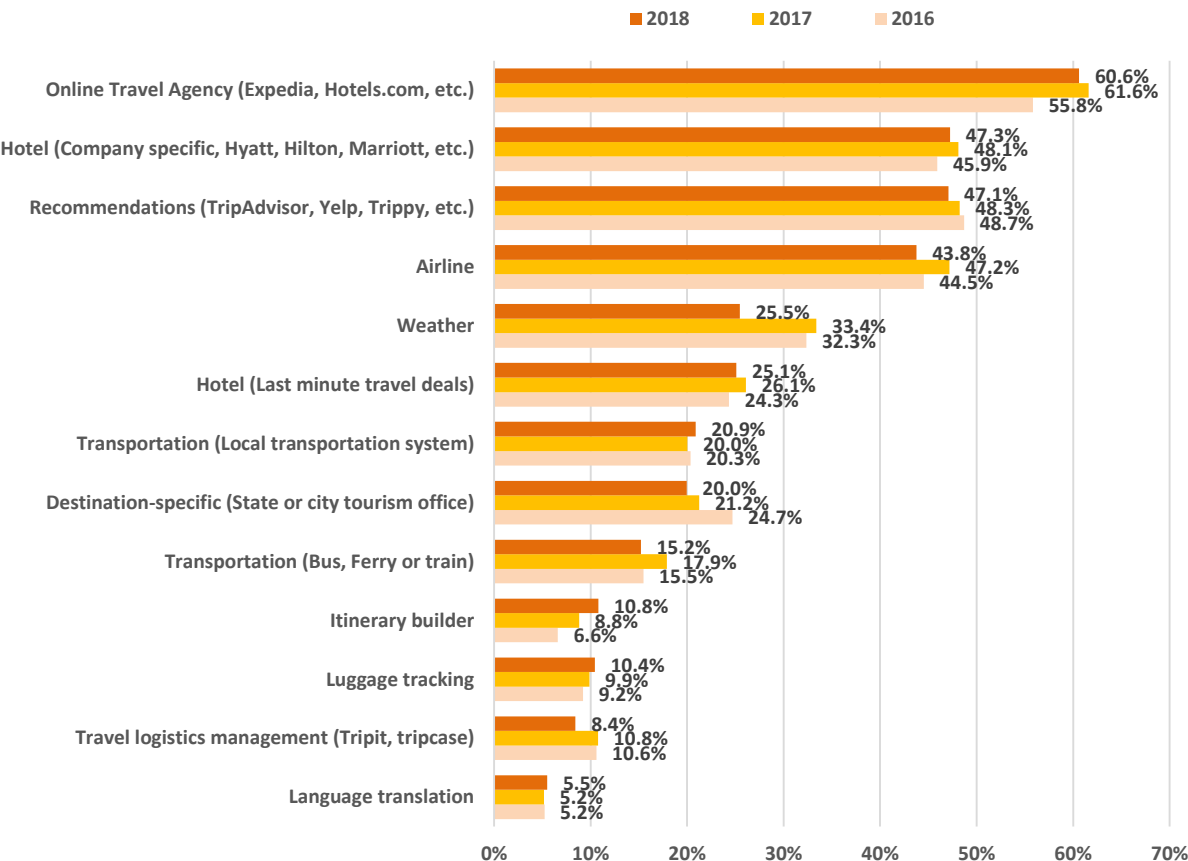
APP Usage

Q: In the PAST TWELVE (12) MONTHS, have you used any travel-related APPs to help you in travel planning?



Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

APP Usage



Top Growth:

Itinerary builders +24%

Most Decline:

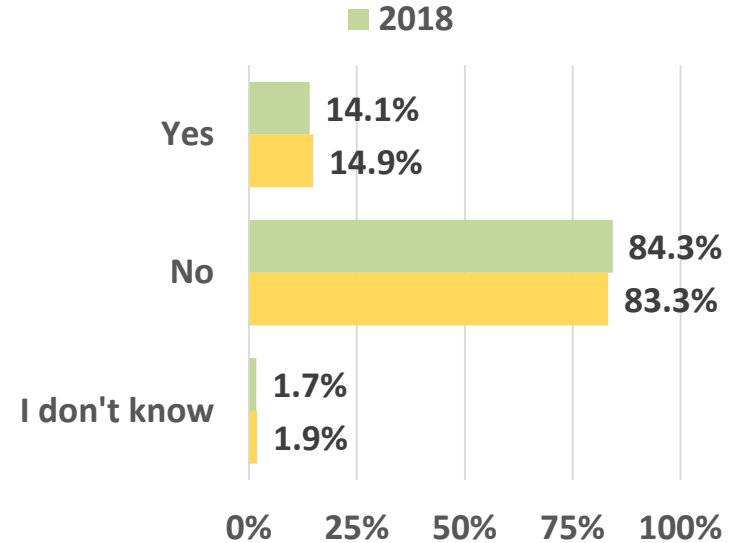
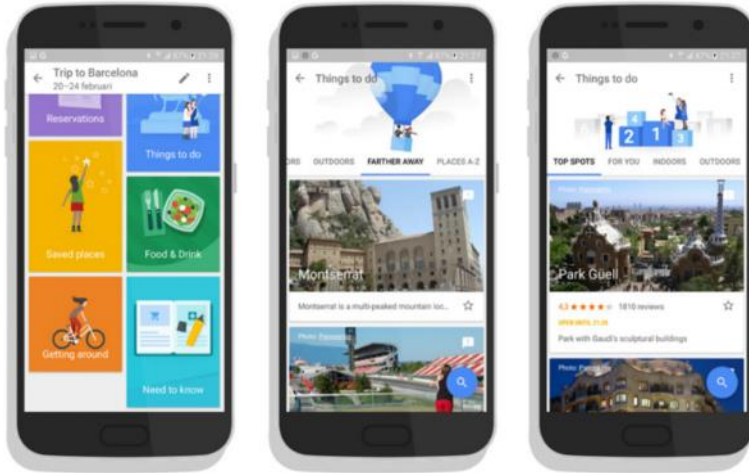
Weather -24%

Travel Logistics Mgmt. -22%

Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Google Trips APP

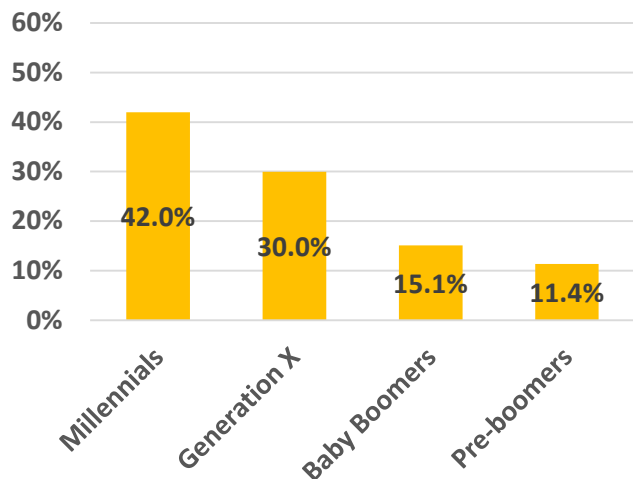
Q: Have you ever used the Google Trips APP?



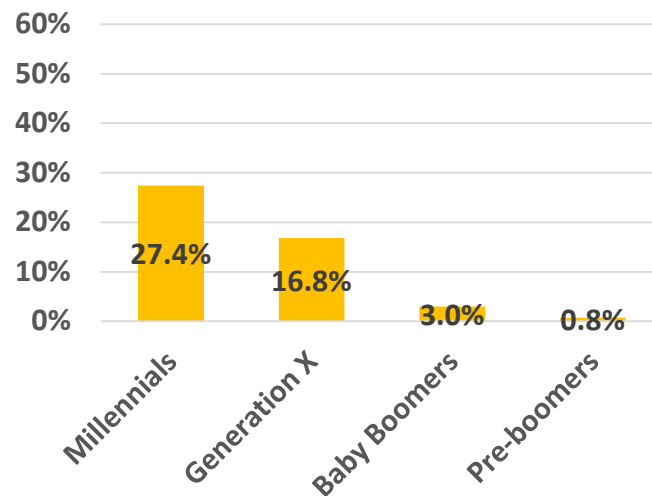
Base: All respondents. (2017 = 2,072 completed surveys,
2018 = 2,021 completed surveys.)

APP Usage

Q: In the PAST TWELVE (12) MONTHS, have you used any travel-related APPs to help you in travel planning?



Q: Have you ever used the Google Trips APP?



Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Google-Curated Content

Google search results for "san francisco ca".

Google's Knowledge Panel

San Francisco
City in California

San Francisco, in northern California, is a city on the tip of a peninsula surrounded by the Pacific Ocean and San Francisco Bay. It's known for its year-round fog, iconic Golden Gate Bridge, cable cars and colorful Victorian houses. The Financial District's Transamerica Pyramid is its most distinctive skyscraper. In the bay sits Alcatraz Island, site of the notorious former prison.

Weather: 55°F (13°C), Wind E at 3 mph (5 km/h), 79% Humidity
Local time: Tuesday 5:13 AM
Population: 864,815 (2015)
Minimum wage: 14.00 USD per hour (Jul 1, 2017)

Plan a trip

San Francisco travel guide

3-star hotel averaging \$204, 5-star averaging \$404

7.7-44 min flight, from \$423

Colleges and Universities: San Francisco State University, MONE
Neighborhoods: Fisherman's Wharf, North Beach, Mission District, MONE
Did you know: San Francisco is the fourth-most-populous city in California (364,815). wikipedia.org

People also search for

View 15+ more

California, United States of America, Los Angeles, San Francisco Bay Area, San Diego

Things to do in San Francisco

Google's Top Sights

Golden Gate Bridge: iconic art deco span opened in 1937

Alcatraz Island: Notorious prison/historical

Pier 39: Scenic pier with food & activities

Golden Gate Park: Gardens, trails, museums & festivals

San Francisco travel guide

SFGOV
sf.gov
Edwin M. Lee, the 43rd Mayor of San Francisco, passed away on December 12, 2017. Mayor Lee dedicated his life to helping others and serving the people of San Francisco. During his three decades of public service, Mayor Lee was a steadfast advocate for the powerless, a voice for the overlooked and a person who...

San Francisco 2018: Best of San Francisco, CA Tourism - TripAdvisor
https://www.tripadvisor.com • United States • California (CA) •
Every neighborhood in San Francisco has its own personality, from the hippest chic of the Upper Haight to the quiet grace of the Mission. The Marina district boasts trendy bistros and postcard-perfect views of the Golden Gate Bridge, while Napa Valley offers quaint and quiet boutiques. Here's hello to the sea lions at Pier 39, ...

Google's Travel Guide

San Francisco

San Francisco is a northern California city on the tip of a peninsula surrounded by the Pacific Ocean and San Francisco Bay. It's known for its year-round fog, iconic Golden Gate Bridge, cable cars and colorful Victorian houses. The Financial District's Transamerica Pyramid is its most distinctive skyscraper. In the bay sits Alcatraz Island, site of the notorious former prison.

Top sights

Golden Gate Bridge, Alcatraz Island, Pier 39, Golden Gate Park, Fisherman's Wharf, North Beach, Mission District, MONE

Plan a trip

San Francisco travel guide

3-star hotel averaging \$204, 5-star averaging \$404

7.7-44 min flight, from \$423

Colleges and Universities: San Francisco State University, MONE
Neighborhoods: Fisherman's Wharf, North Beach, Mission District, MONE
Did you know: San Francisco is the fourth-most-populous city in California (364,815). wikipedia.org

People also search for

View 15+ more

California, United States of America, Los Angeles, San Francisco Bay Area, San Diego

Google-Curated Content

The screenshot shows a Google search for "san francisco ca". The results include a Wikipedia entry, travel information, a list of top sights, and a travel guide. A red box highlights the "Google's Top Sights" section, which lists four attractions: Golden Gate Bridge, Alcatraz Island, Pier 39, and Golden Gate Park. Another red box highlights the "San Francisco travel guide" link. The "Google's Knowledge Panel" on the right provides a map, weather, and travel details for San Francisco.

Google's Knowledge Panel

Google's Top Sights

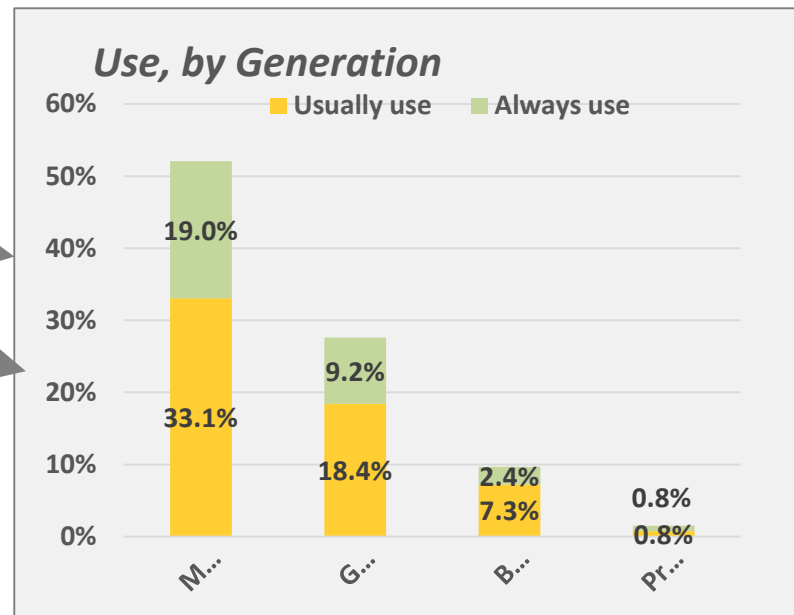
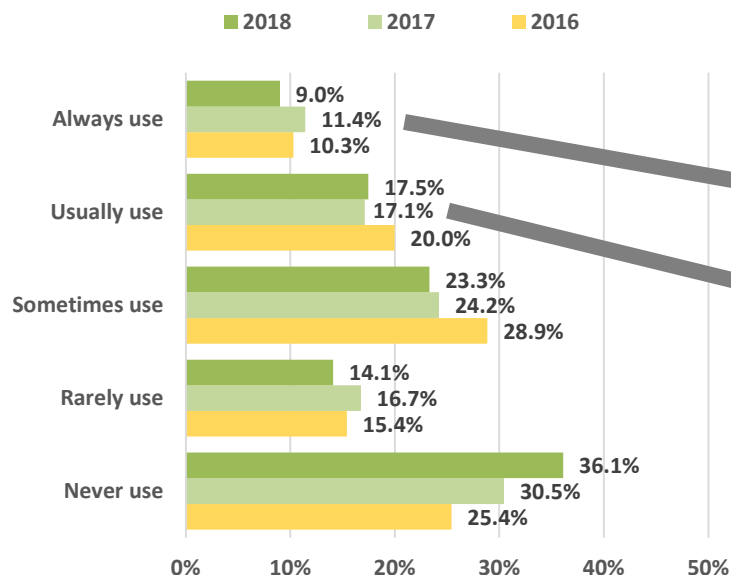
- Golden Gate Bridge
- Alcatraz Island
- Pier 39
- Golden Gate Park

San Francisco travel guide

Q: How frequently do you use Google-curated destination content to plan your leisure trips? (Select one)

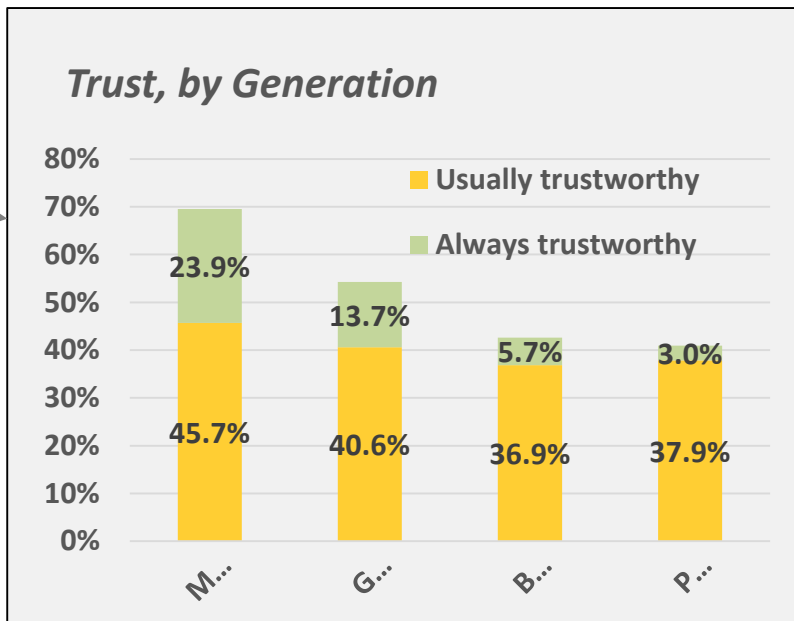
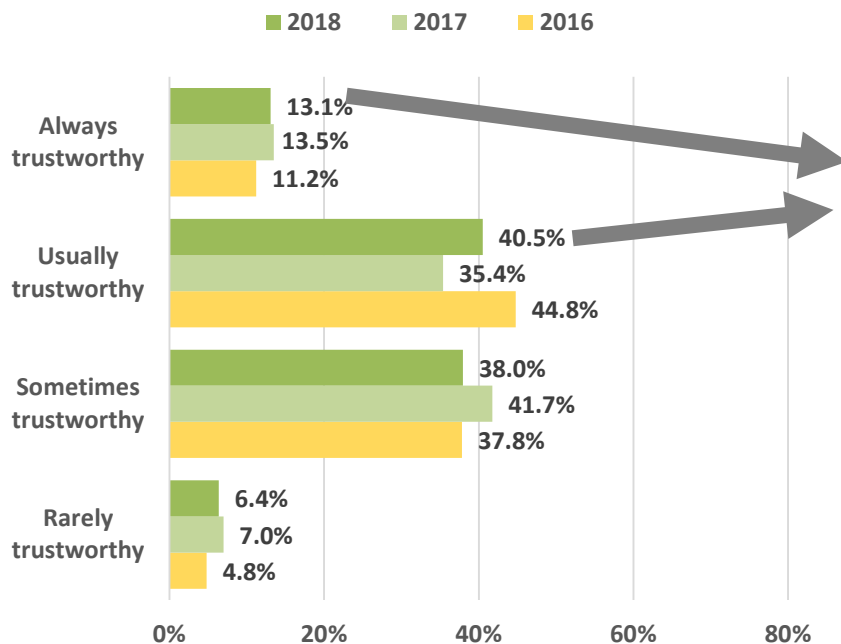
Google-Curated Content

Q: How frequently do you use Google-curated destination content to plan your leisure trips? (Select one)



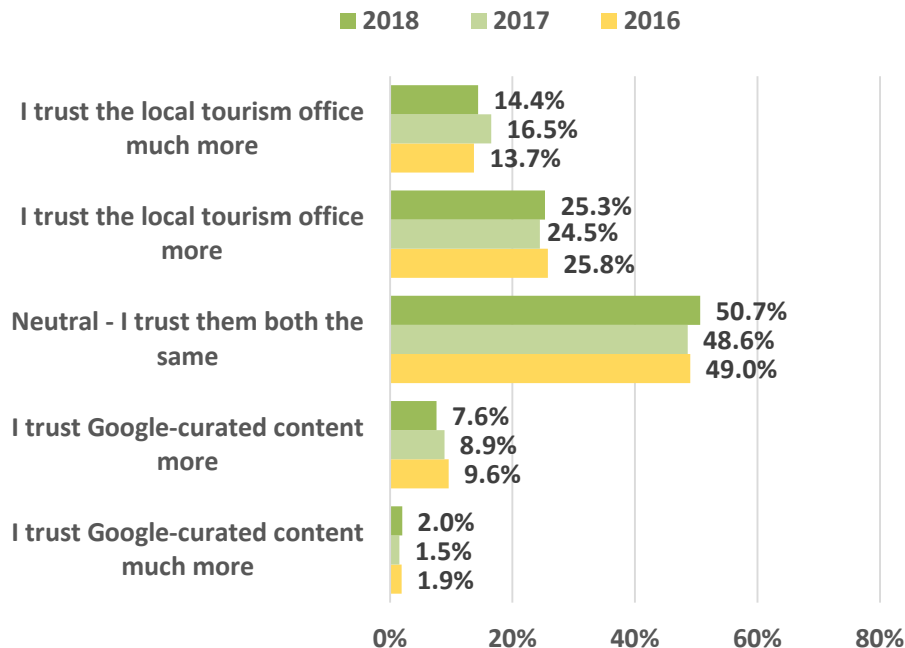
Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Q: How much would you trust the content, opinions and advice available of Google-curated destination content?



Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Google-Curated Content vs. DMO Content



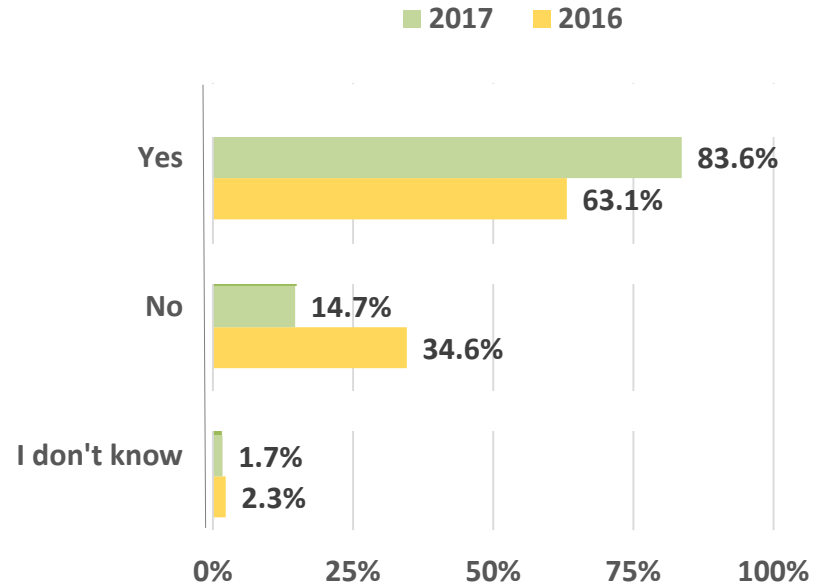
Q: Which content, opinions and advice would you generally trust more? A local visitor bureau/tourism office or Google-curated content? (Select one)

Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

VR Headsets

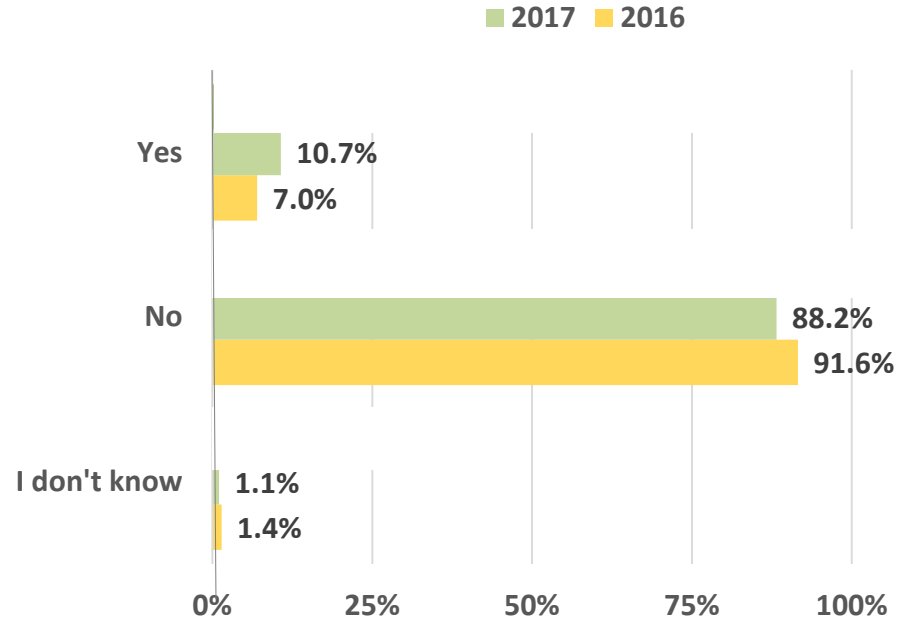


Q: Have you heard of Virtual Reality Headsets before taking this survey?



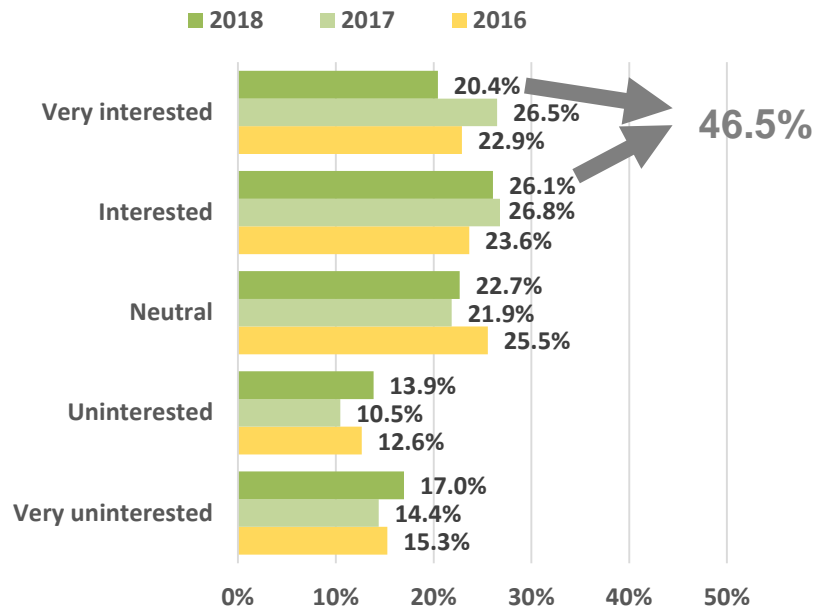
Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Q: Have you used a Virtual Reality Headset to help plan any leisure travel?

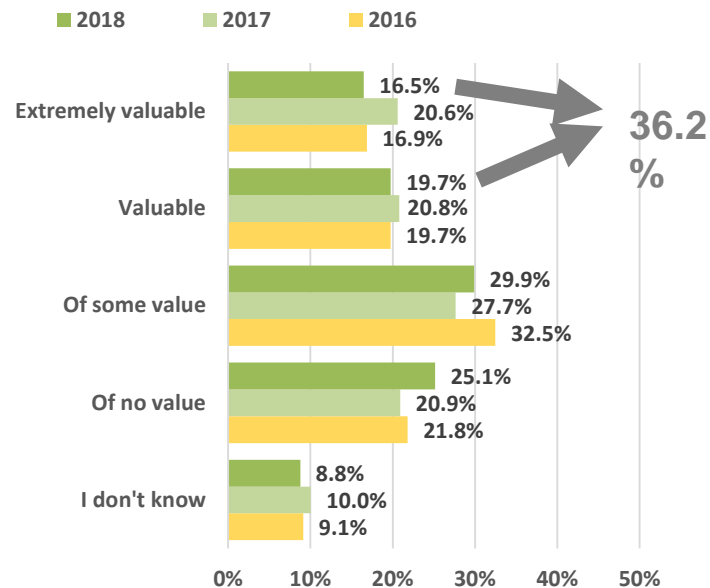


Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Q: If good content were available to you, how interested would you be in using a Virtual Reality Headset to research leisure destinations you are considering visiting? (Select one)



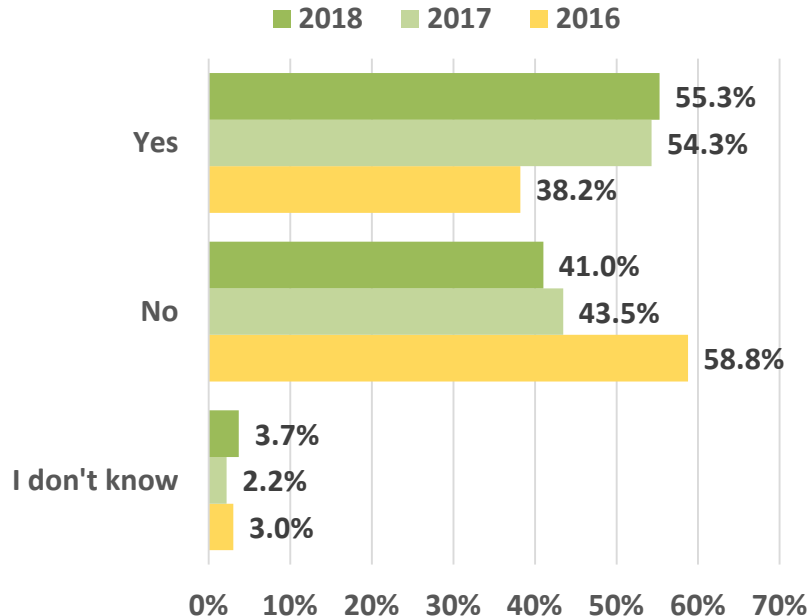
Q: Overall, how valuable do you think a Virtual Reality Headset could be to you in helping you plan your leisure travels? (Select one)



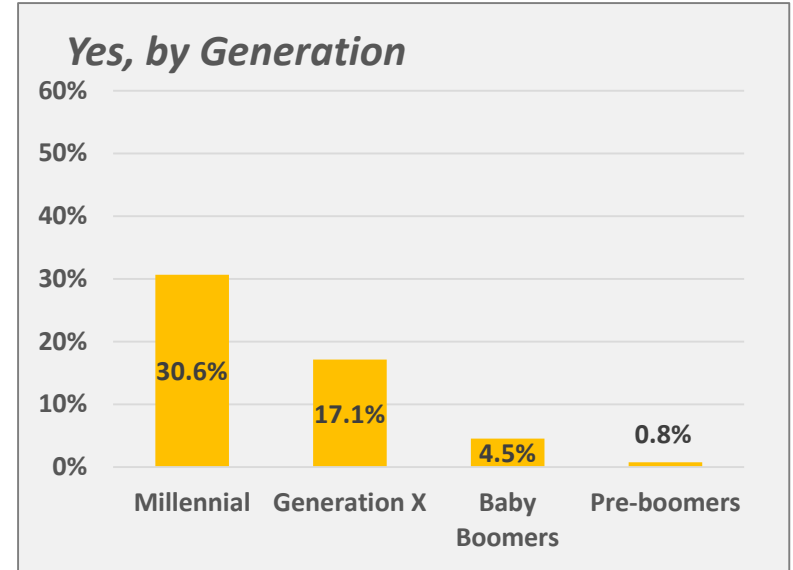
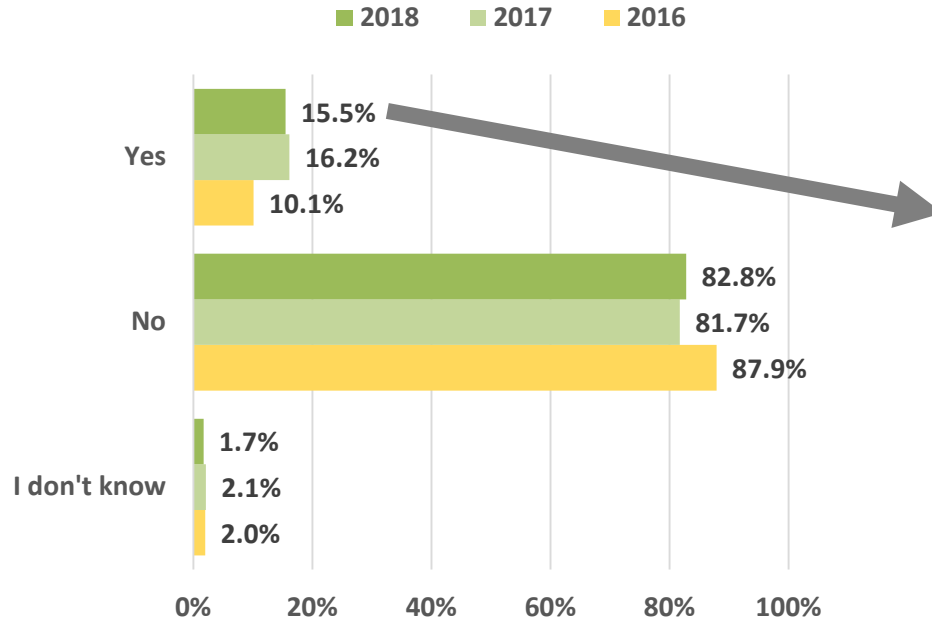
Real Time Video



Q: Have you heard of Real-time Video before taking this survey?

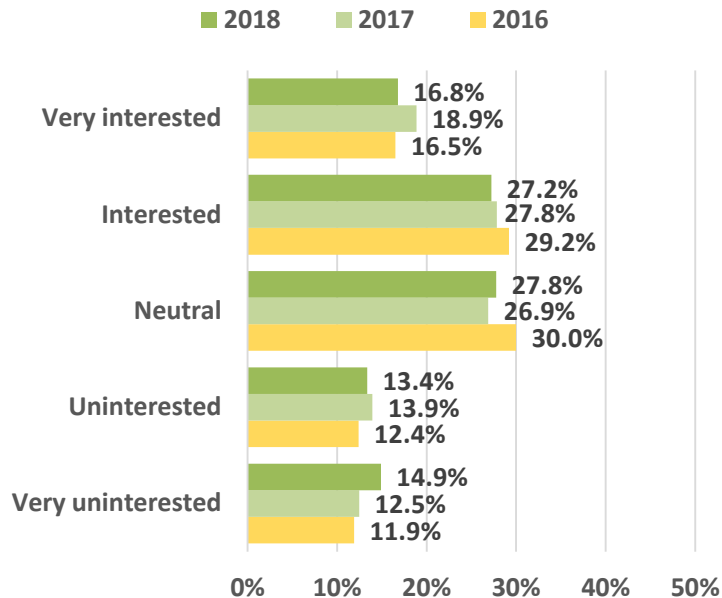


Q: Have you used Real-time Video to help plan any leisure travel?

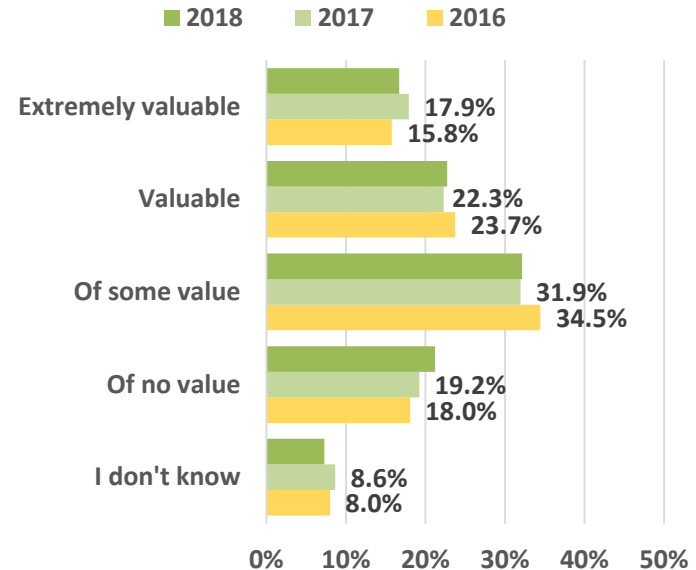


Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Q: In general, how interested would you be in using Real-time Video to research leisure destinations you are considering visiting? (Select one)



Q: Overall, how valuable do you think Real-time Video could be to you in helping you plan your leisure travels? (Select one)

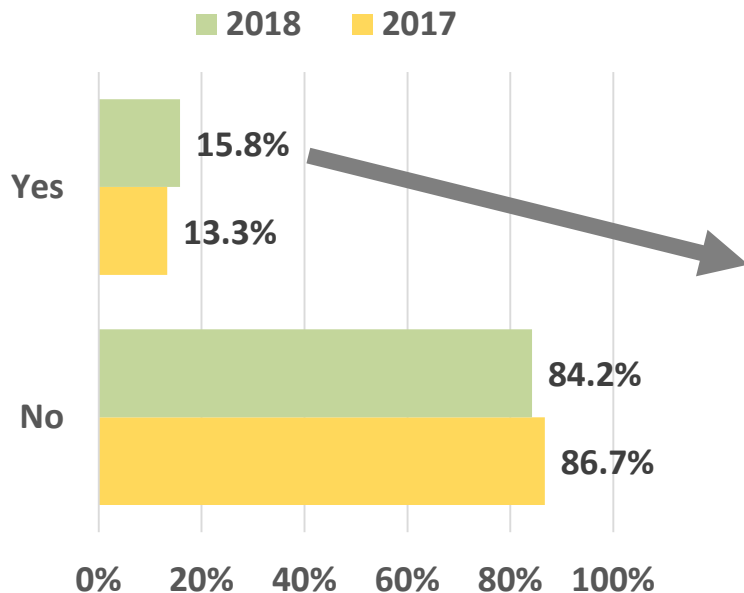


Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Amazon Echo - Google Home

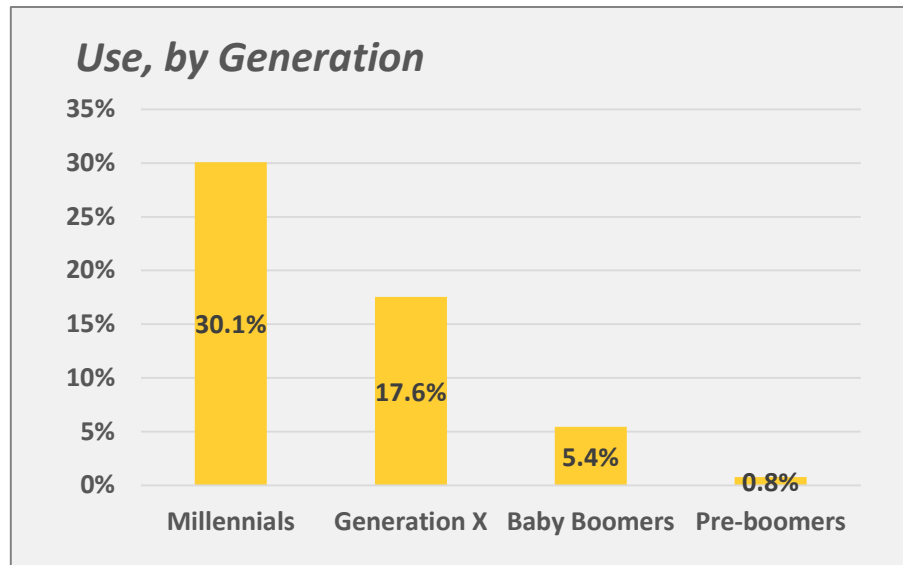


Amazon Echo/Google Home



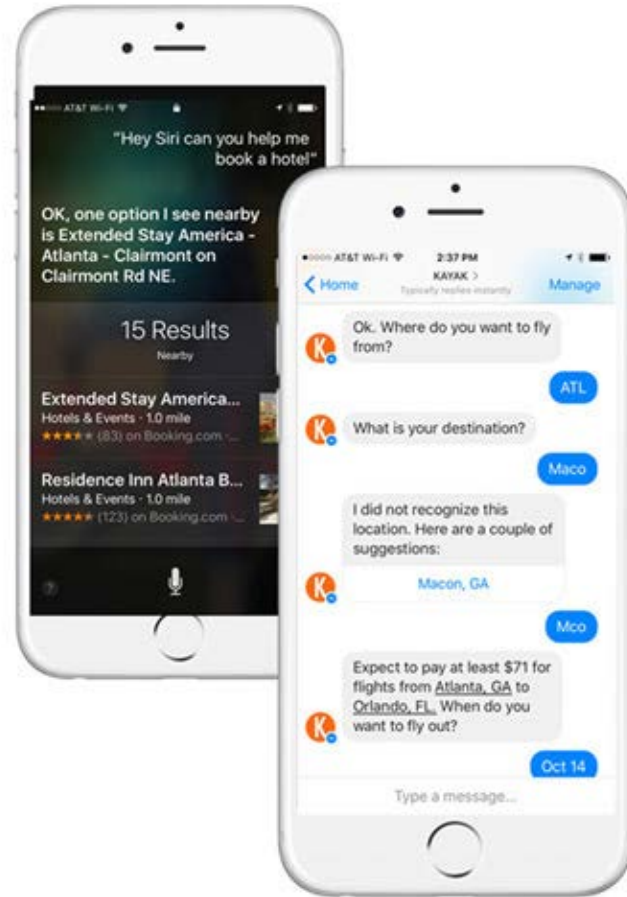
Base: All respondents. (2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Q: In the PAST 12 MONTHS, have you used a device like Amazon Echo or Google Home for travel planning? (See image above at right) (see image above on right)



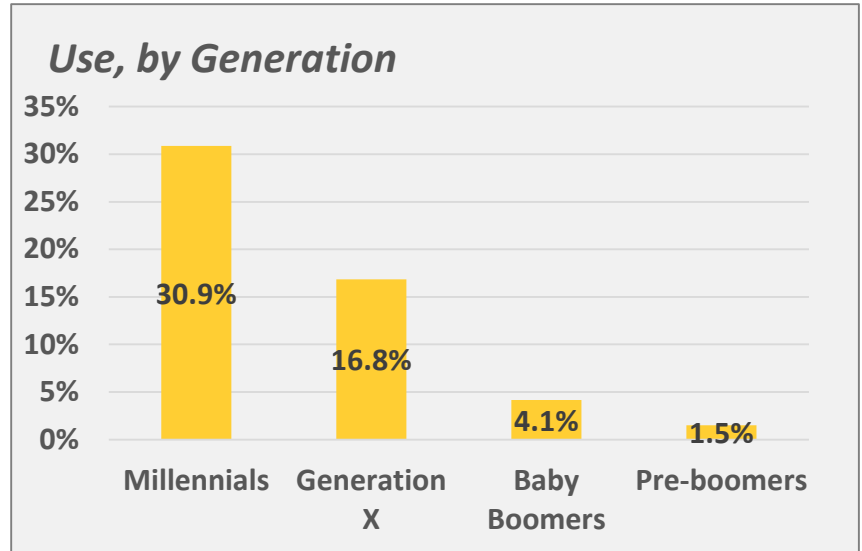
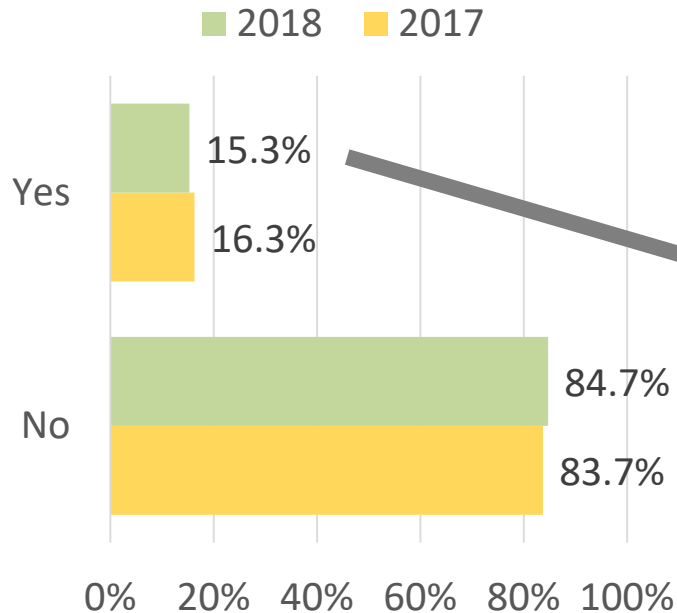
Base: All respondents. (2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Messaging APPS or ChatBots



Messaging APPS or ChatBots

Q: In the PAST 12 MONTHS, have you used a Messaging App or ChatBot solution (using text or voice) to help plan, book or update your leisure travel?



Base: All respondents. (2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

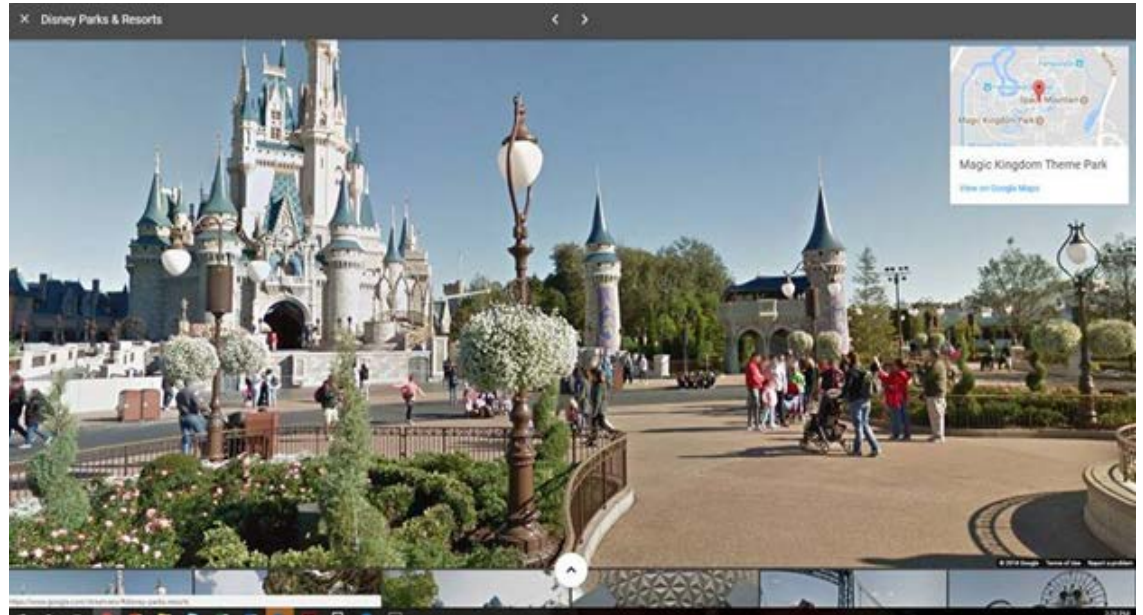
Travel-related 360 Degree Video



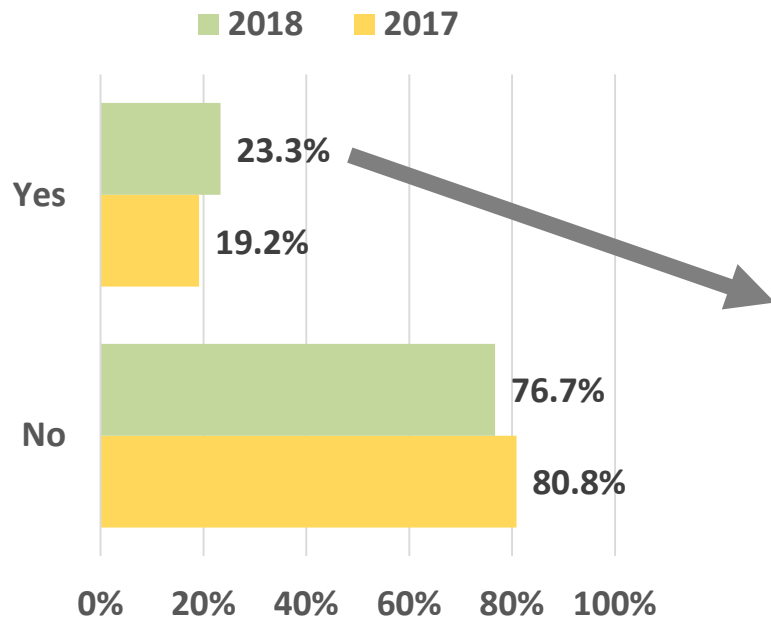
Home Things to Do Aquatic and coastal experiences

Learn about some of Australia's iconic aquatic, beach and coastal destinations.

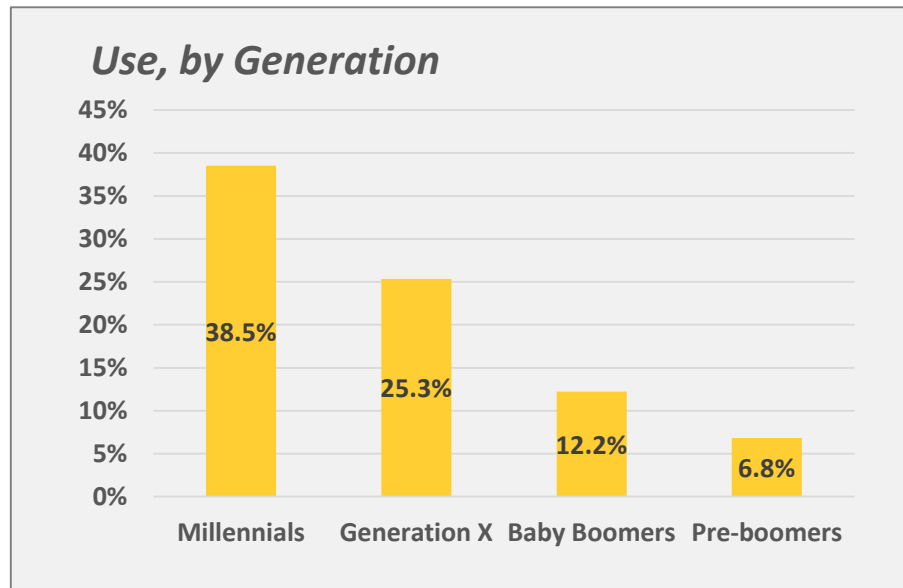
Explore some of the country's best-known landmarks such as the Great Barrier Reef in Queensland, the Great Ocean Road in Victoria, Sydney Harbour in New South Wales and Tasman National Park in Tasmania.



Travel-related 360 Degree Video



Q: In the PAST 12 MONTHS, have you viewed a travel-related 360 Degree Video on your computer or smartphone



WORD OF MOUTH

DESTINATION SELECTION

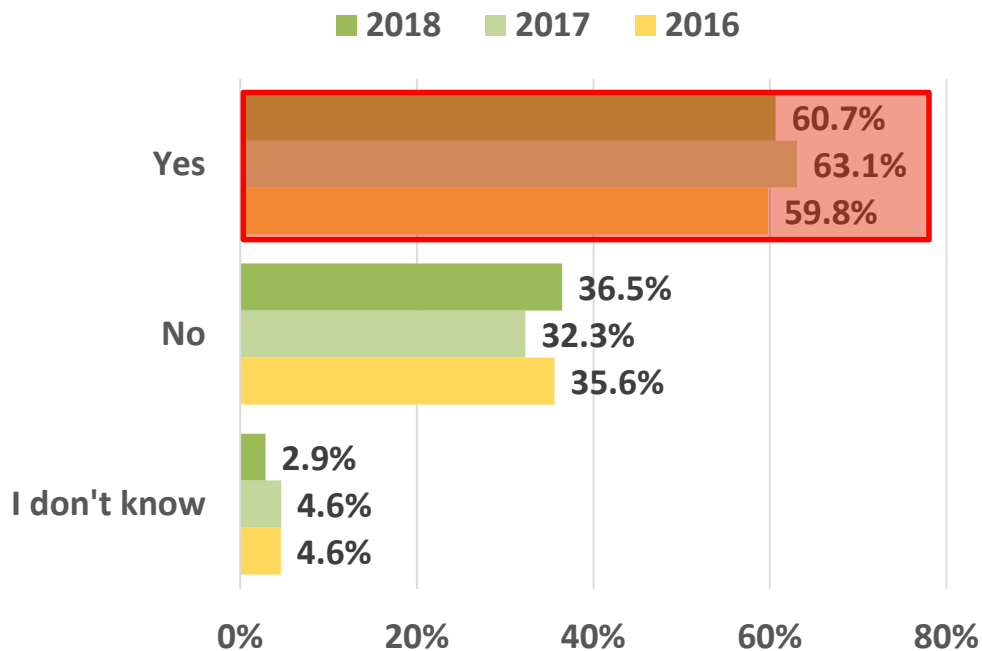


Please think specifically about **ONE (1) DOMESTIC LEISURE DESTINATION** you really want to visit in the NEXT TWELVE (12) MONTHS.

Please write in this destination below.

(Please only enter a place in America that you realistically might visit. Please spell carefully.)

Word of Mouth – In Destination Selection



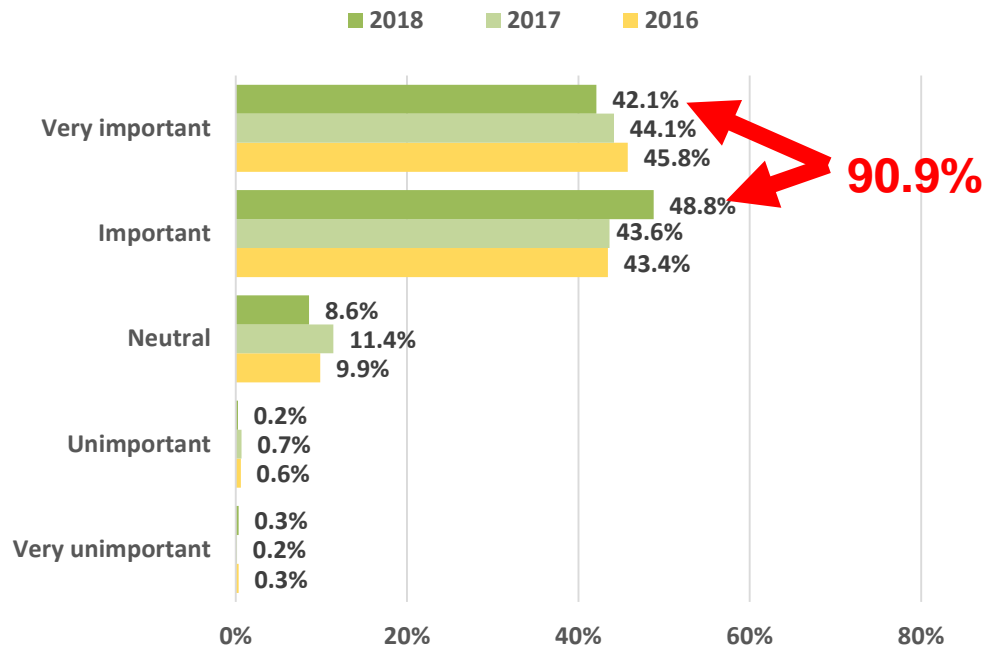
Please think about the people you have had contact with who have shared their opinions with you about <DESTINATION>.

Q: Did these persons' experiences, advice or opinions have any impact on your interest in visiting <DESTINATION> (Select one)

Base: All respondents. (2016 = 2,006 completed surveys and 2017 = 2,072 completed surveys, 2018 = 2,021 completed surveys.)

Word of Mouth – In Destination Selection

Q: How important were these opinions to your interest in visiting <DESTINATION>? (Select one)

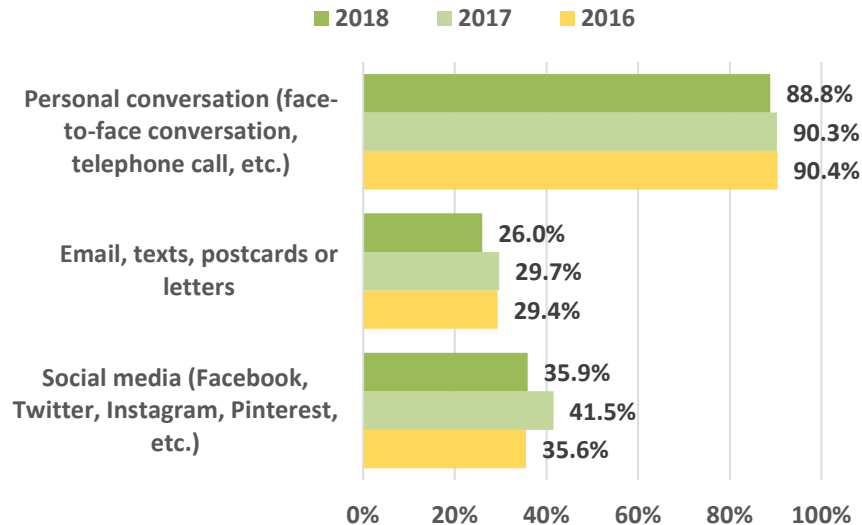


Word of Mouth – In Destination Selection

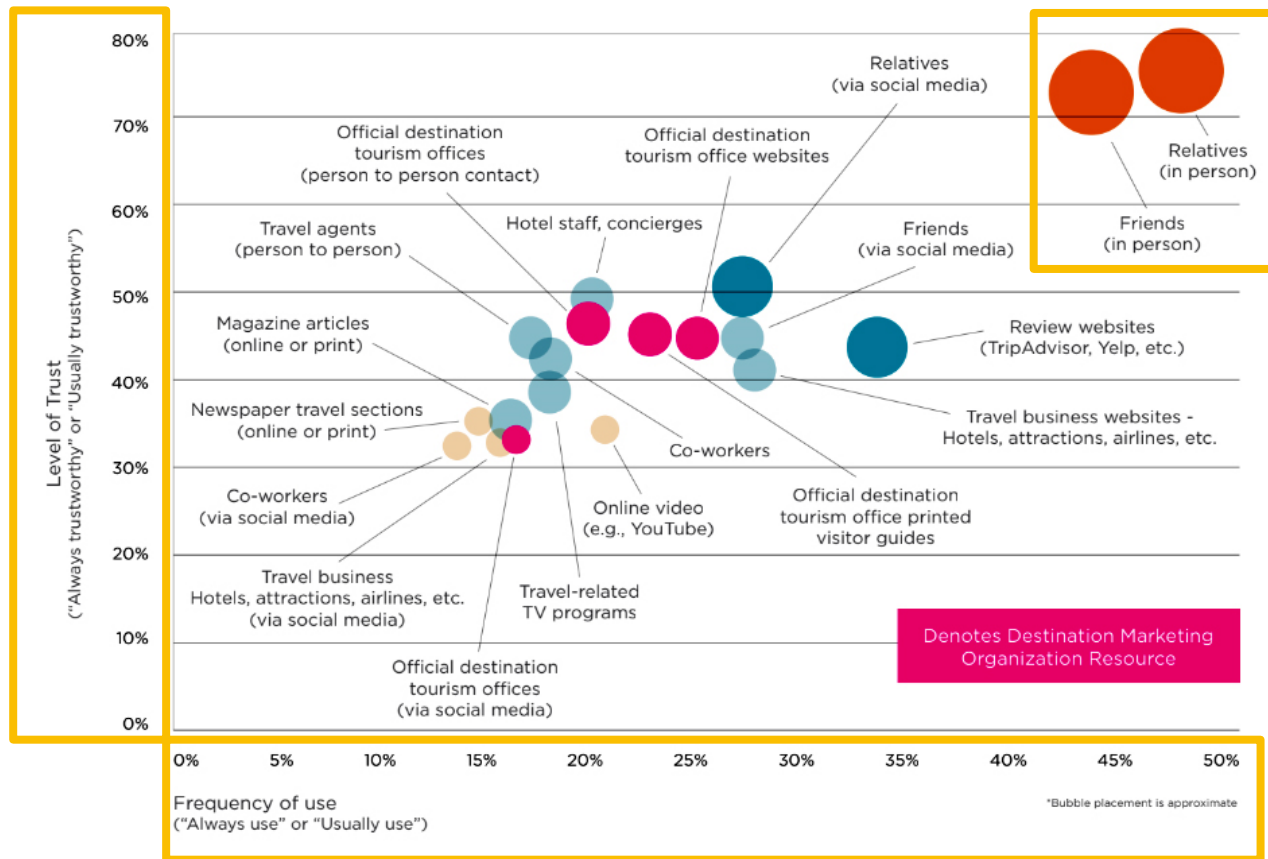
% of Travelers' Destination Choices Significantly Influenced by Word-of-Mouth



**Q: In which ways did the people
you know talk about DESTINATION?
(Select all that apply)**



Trust, Use and Importance





SPOTLIGHT SEGMENT

NEW TECHNOLOGY AND TRENDS IN STREET VIEW

Innovation in 360 and New Opportunities for Destinations

360 Imagery and User-Generated Google **Street View**



Street View
mobile ready

Giroptic
NCTech Ltd.
360Fly
KenXen



Street View
auto ready

Sphericam
Z CAM
Insta360
NCTech Ltd.



Street View
vr ready

Matterport
NCTech Ltd.
InsideMaps



Street View
workflow ready

Samsung
GoPro
HumanEyes Tech.
iGuide
GoThru
Garden Gnome
Panoskin/LCP360

Summer 2017



Develop Street View certified products.

[HOME](#)[SPECIFICATIONS](#)[SUPPORT & SUBMISSIONS](#)[BRANDING GUIDELINES](#)

Market your Google-certified products as "Street View ready"

Street View is one of Google's most popular brands and among the best-known within 360 and VR industries. Through this program, developers can leverage this brand when marketing products that have been verified and certified by Google as compatible. Certification can be gained if your product meets any one of the four standards outlined below.



Street View
ready

Street View Auto Ready

Street View mobile ready

Street View mobile ready

360 cameras that can publish Street View from a mobile app—without requiring a desktop workflow

[MOBILE-READY SPECS](#)

Street View auto ready

Street View auto ready

Street View app-compatible 360 cameras tailored for vehicle-based collection with the highest accuracy

[AUTO-READY SPECS](#)

Street View vr ready

Street View vr ready

360 cameras or systems that collect geometry in addition to generating sets of connected 360 photos

[VR-READY SPECS](#)

Street View workflow ready

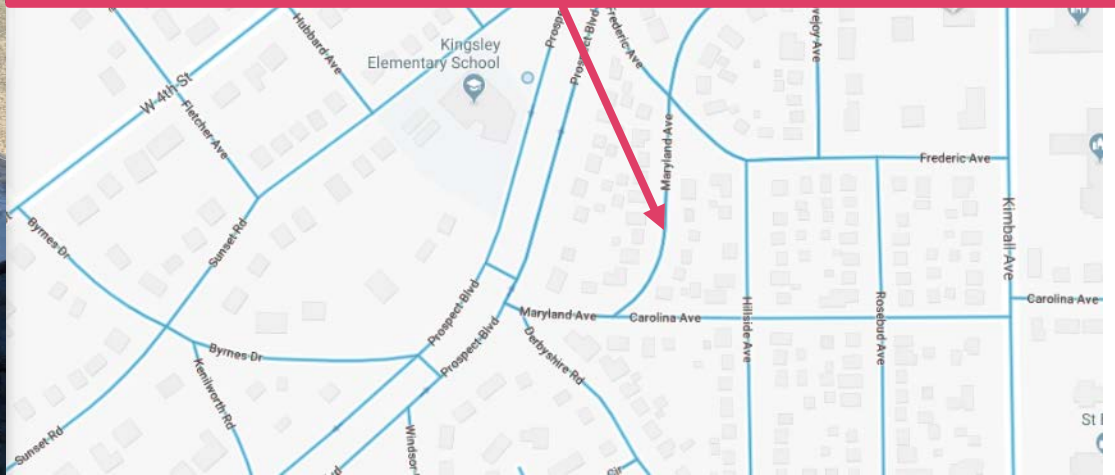
Street View workflow ready

Publishing utilities—sometimes bundled with cameras—that can upload to Street View accounts

[WORKFLOW-READY SPECS](#)

Product evaluation

Badge use and general promotion





Insta360™ Pro



Street View Auto Ready

8K @ 5fps
Onboard
Stitching
etc.

Mammoth Mountain Ski Area, MI

Mammoth Mountain Ski Area

4.7 ★★★★★ · 899 reviews

Ski Resort

Directions

SAVE

NEARBY

SEND TO YOUR PHONE

SHARE

Year-round ski area offering 3,500 acres of terrain for skiers & snowboarders of all ability levels.

Live performances · Good for kids

10001 Minaret Rd, Mammoth Lakes, CA 93546

mammothmountain.com

(800) 626-6684

Add a label

SUGGEST AN EDIT

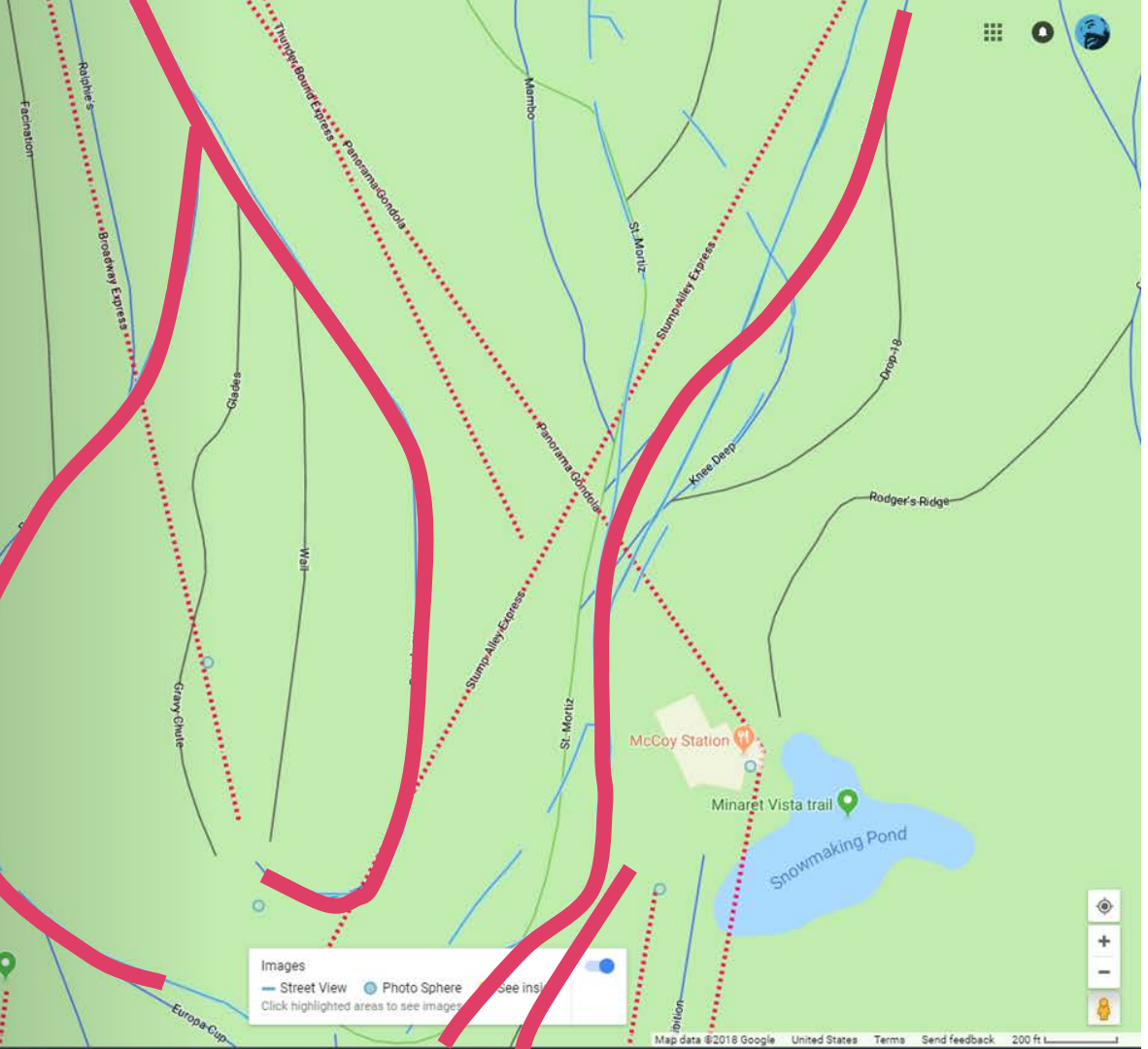
Add missing information

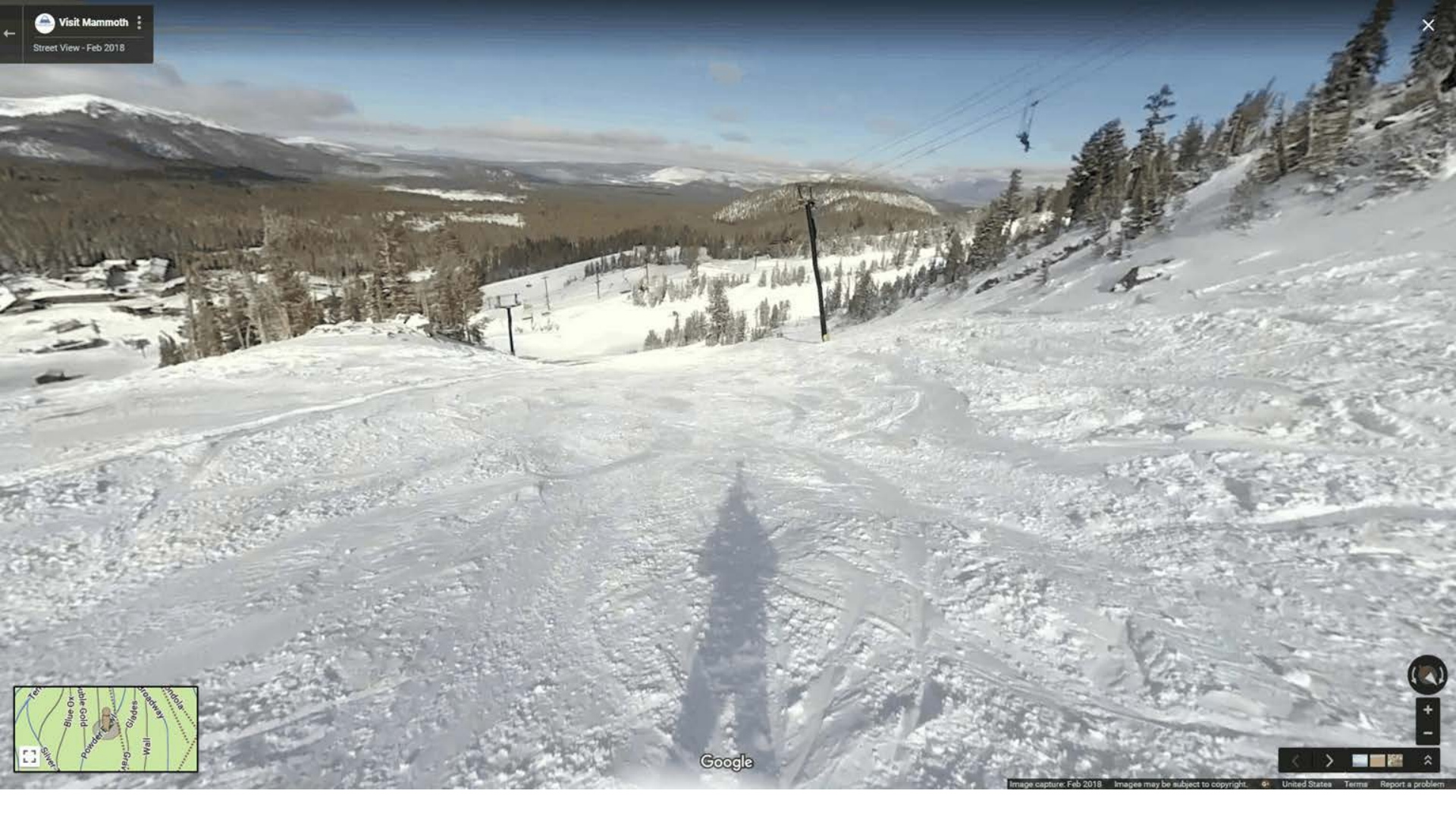
Add hours

2014 Photos

Add a photo

2011



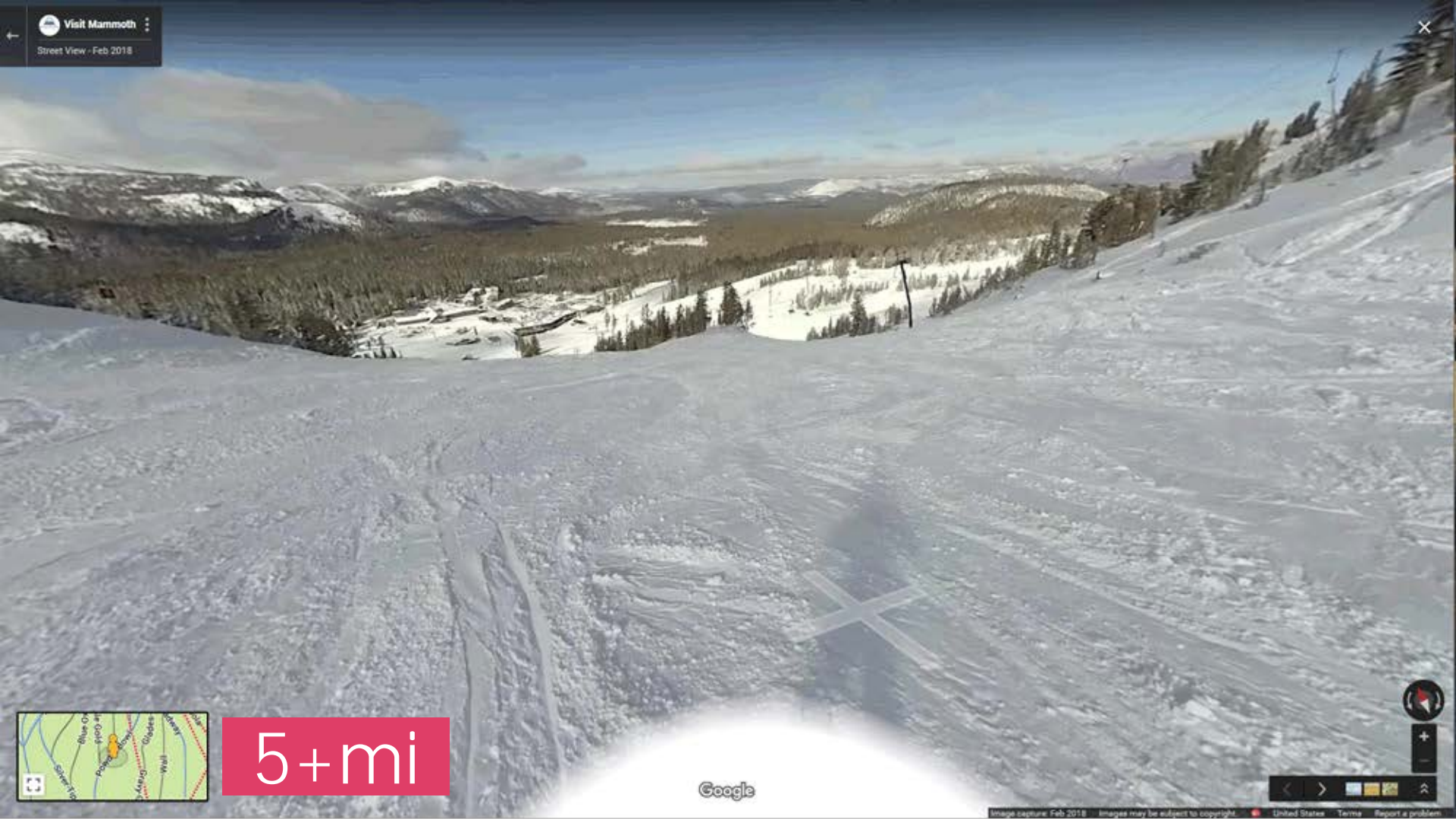


Visit Mammoth

Street View - Feb 2018



Google



5+mi

Google



Visit Mammoth

Street View - Feb 2018



BERMUDA

GoToBermuda.com



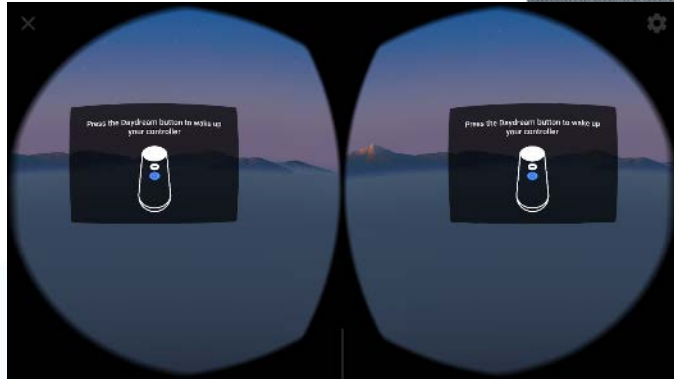


Daydream View

VR headset built for
comfort and choice

Powered by any Daydream-ready phone, Daydream View is a comfortable, easy-to-use headset designed with choice in mind.

[Daydream View headset →](#)



[Discover all Daydream-ready phones](#)

Other Applications

Street View
360 Video
VR Video (3D)
Live Broadcast

...

Street View Camera Loan Application

The Google Street View camera loan program is here to help you share 360 experiences from amazing places around the world via Google Maps.

This program is open to pro photographers, travelers, and organizations (such as tourism boards, non-profits, government agencies, universities or research groups). It's also open to others seeking to promote areas of cultural, historical or touristic significance as well as those who intend to photograph business interiors.

Under this program, we may offer to lend you a Street View Trekker backpack or a Street View app-compatible 360 camera, depending on availability and what may best match your needs.

Important Notes

- We are unable to satisfy all loan requests, but we appreciate your time and will reach out to those we can.
- This program is currently available for a limited set of countries, but we're working to expand eligibility to additional countries in the future.
- Your submission of an application will not guarantee that you will be selected. Google will select participants at its sole discretion.
- If selected for the program, Google will contact you regarding the manner in which the camera will be delivered.
- Google is not able to provide funding or sponsorship for applicants to the Street View loan program, beyond the equipment loan itself.

Google Inc., 1600 Amphitheater Pkwy, Mountain View, CA 94043, United States

First Name

Organization/corporate email address

google.com/streetview/loan/



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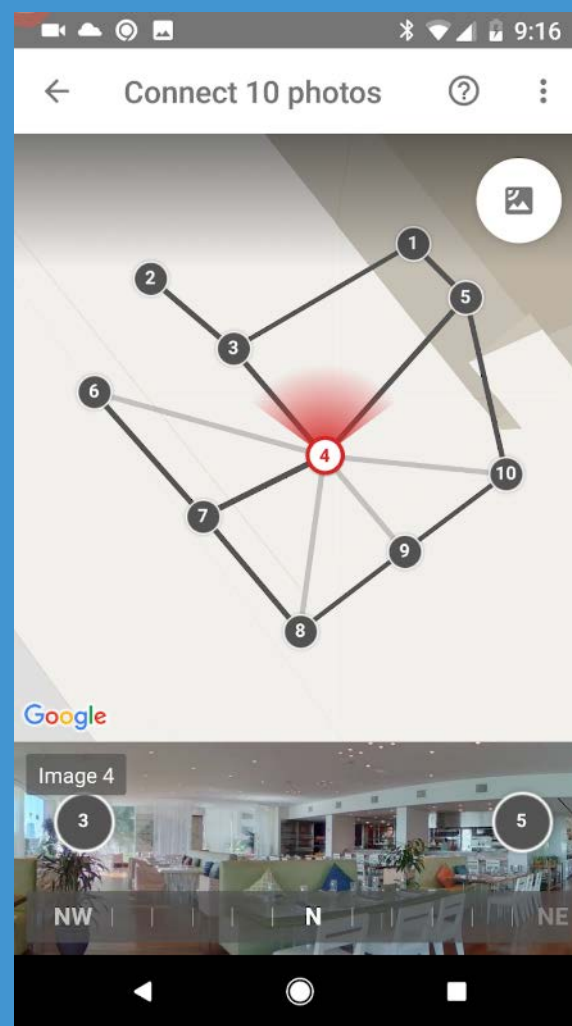
Technological barriers
to creating 360s



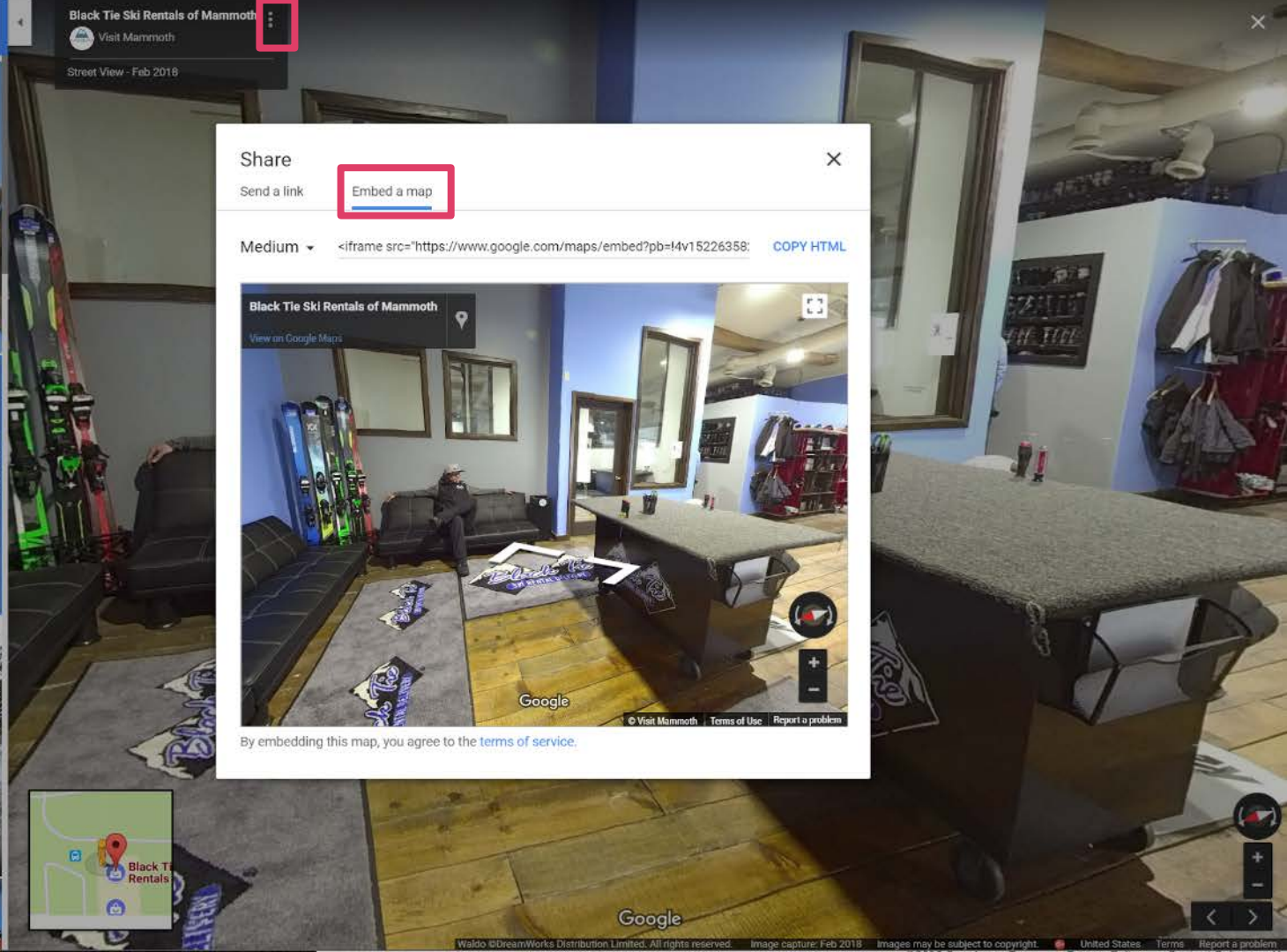
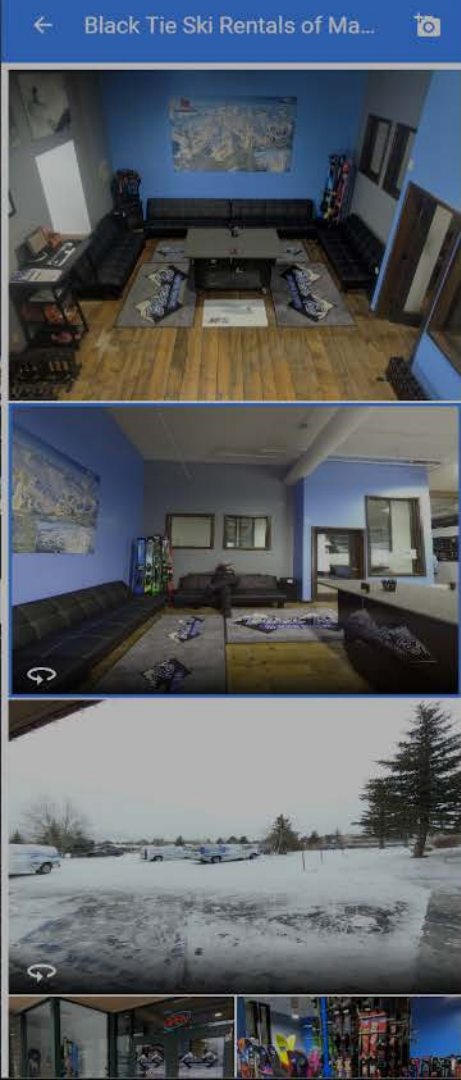
Image quality and stitching issues



Ricoh Theta V



Individual 360s and connected 360s (Virtual Tours) are a great way to engage potential visitors.



Share

Send a link

Embed a map

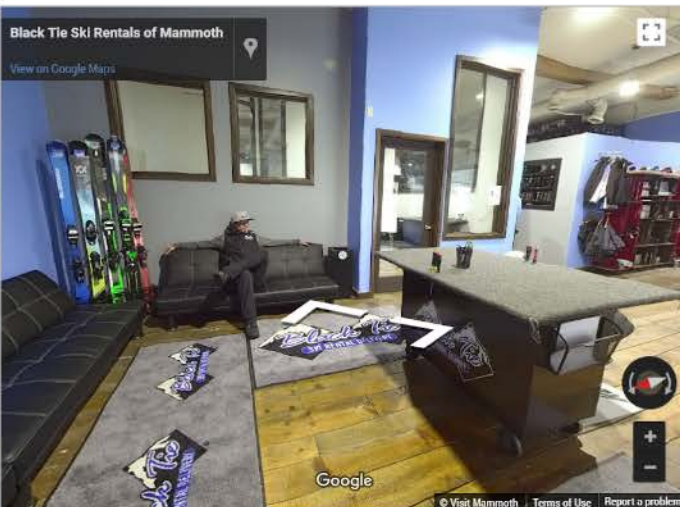
Medium

<iframe src="https://www.google.com/maps/embed?pb=!4v15226358;"

[COPY HTML](#)

Black Tie Ski Rentals of Mammoth

View on Google Maps



By embedding this map, you agree to the [terms of service](#).

Welcome to the DMO Knowledge Base

How to make the most of your destination on Google

The DMO Partnership Program aims to enhance your destination's online visibility.

Much of Google's online content is built on the combined contributions of Google, users, and DMOs.

In this help center you will find the details on how you can get the most out of Google products and help your local partners update their information on Google.



Google My Business



Trusted Verifier



Trusted Provider



City Photos



360 imagery



Videos



Google Maps



Events



Google Travel



Wikipedia



Report an Issue



GOOGLE DMO PARTNERSHIP
Free tools destinations can use to improve the way your destination looks in Google's products.

dmo-partnerships@google.com

miles
PARTNERSHIP

Education, Training and Execution Program

Education:

- Audit
- Webinar & Workshop

Training:

- In-Person
- Documentation

Execution:

- Expert Resources
- Ongoing Support

Summary:

- Platform and hardware changes make it possible to **update your own Street View data** on Google Maps
- Look for other **creative ways to use these tools** to benefit your destination
- Hardware quality and ease-of-use make it a great time to **look at other single-image 360 and virtual tour opportunities** for your destination and your partner businesses

CURRENT TRAVEL SENTIMENT



THE KEY: ■ expect more ■ expect the same ■ expect less



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?

37.6

Percent of Americans
will take more leisure trips this year

37.1

Percent of Americans
will spend more on leisure travel this year

Base: All respondents. (2018 = 2,021 completed surveys.)



DREICHBACH@DESTINATIONANALYSTS.COM
@DA_RESEARCH



Q&A

Thank you

miles
PARTNERSHIP

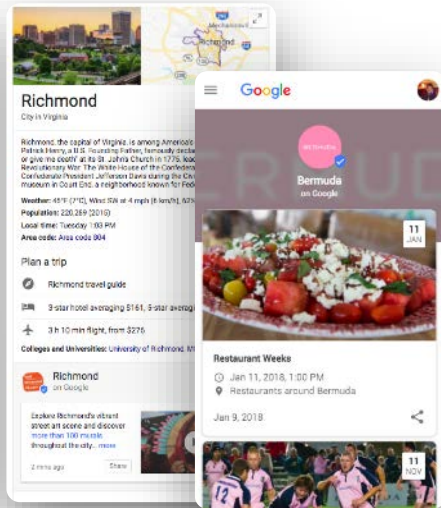
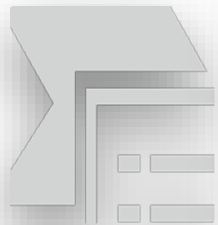
milespartnership.com

The State of the American Traveler: Technology Edition

Research, slides and other resources will be available at www.milespartnership.com/SAT




Posts with Google Webinar: Wednesday, May 23, 3 pm ET





Aditya Mahesh, Product Manager, Google
& **Patrick Rodgers, Content Director, Miles Partnership**

For more information and to register, visit
www.MilesPartnership.com/GooglePosts



Amplify Your Reach with Google Posts for Destinations

[Register Now](#)

Share  

Join Us for a Webinar with Google
Wednesday, May 23, 3pm ET/7pm UT

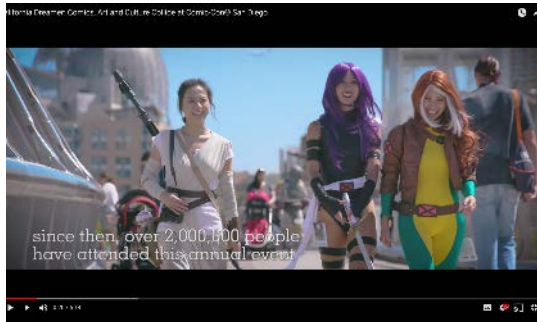
New, Free Communication Platform for DMOs from Google

- [Apply for a Free Posts with Google Account](#) for your Destination
- [Join the Training Webinar](#) with Google and Miles on May 23

Blog Post: Top Performing DMO Videos (& Vloggers)

An analysis of the
YouTube Channels of
186 of the world's
largest Destination
Marketing
Organizations & 10 of
the world's most active
Travel Vloggers
(Influencers)

www.MilesPartnership.com/blog



THANK YOU!

THE STATE OF THE AMERICAN TRAVELER:

TECHNOLOGY EDITION

MAY 16, 2018

Destination  Analysts

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