

TRAVELER SEGMENTS EDITION

The Interests, Motivations & Behavior Of US Travelers

AUGUST 1, 2018

Destination Analysts miles



With You



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Guest Presenter



Amrita Gurney
VP of Marketing
CrowdRiff



The State of the American Traveler: Traveler Segments Edition

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







Thanks to:







Plan to be Boise Bound in September!

Professional of Destination Management (PDM): Fundamentals

September 10, 2018 Destinations International & DMA West Partner Program

The Riverside Hotel • Boise, Idaho

Fundamentals is a day-long interactive course focusing on the evolving trends in the travel and tourism industry and marketplace and how destination organizations successfully align with these changes.

DMA West Education Summit & Vendor Showcase and Best Idea Program

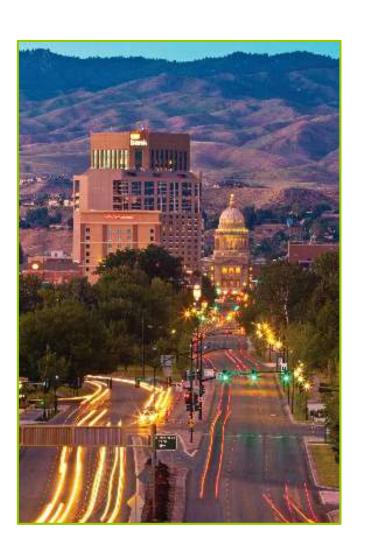
September 11-13, 2018 The Riverside Hotel • Boise, Idaho • Boise CVB • <u>www.boise.org</u> FEATURED SESSIONS:

Better Human: It's a Full-time Job

Deconstructing Viral: How to Build a Killer Tourism Viral Marketing Campaign

Crisis Communications: Progressive Messaging

Innovative Travel Campaigns



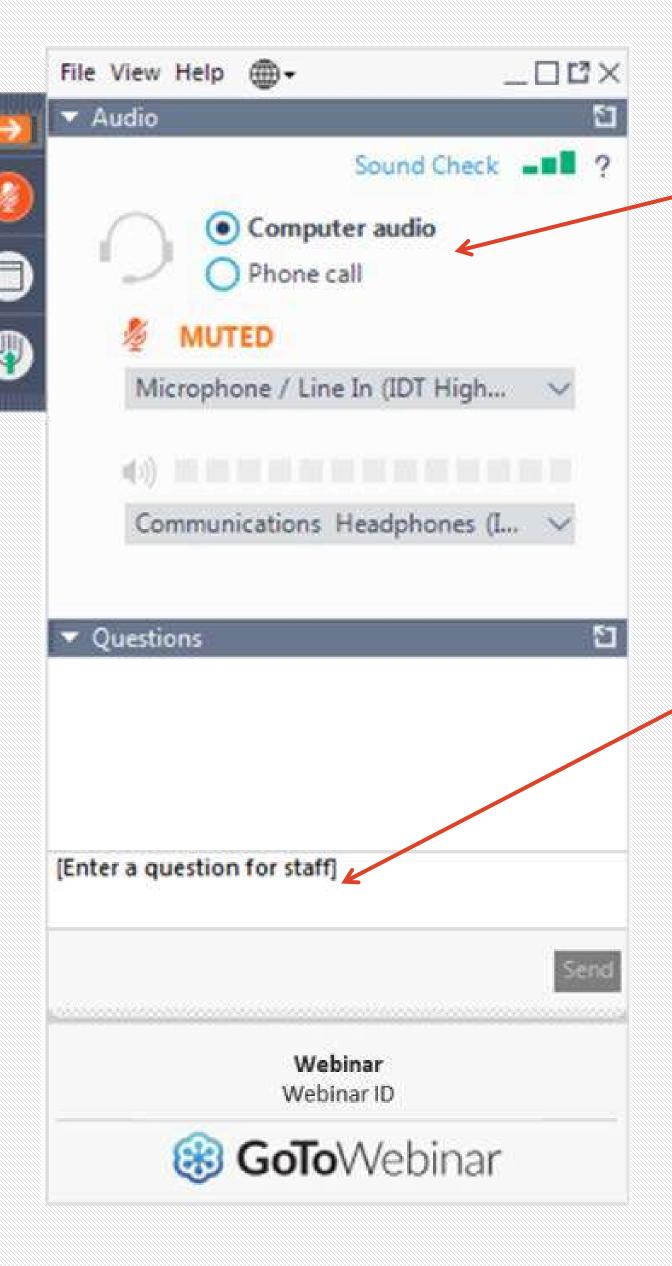


Presented By: VISITFLORIDA COM

Open or close the control panel with the orange button.

How to participate

- In case of "drop-off", use your link to rejoin the webinar.
- A Q&A session will be held at the end of today's presentation,
- Today's webinar is being recorded and will be made available for viewing later.



Choose to use computer audio or di in by phone.

Have a question? Ask it here.





Agenda

- Research: Traveler Segments
- **Spotlight: Using Visual Content for** Maximum Effect
- Research: American Traveler Sentiment
- Additional Research & Resources





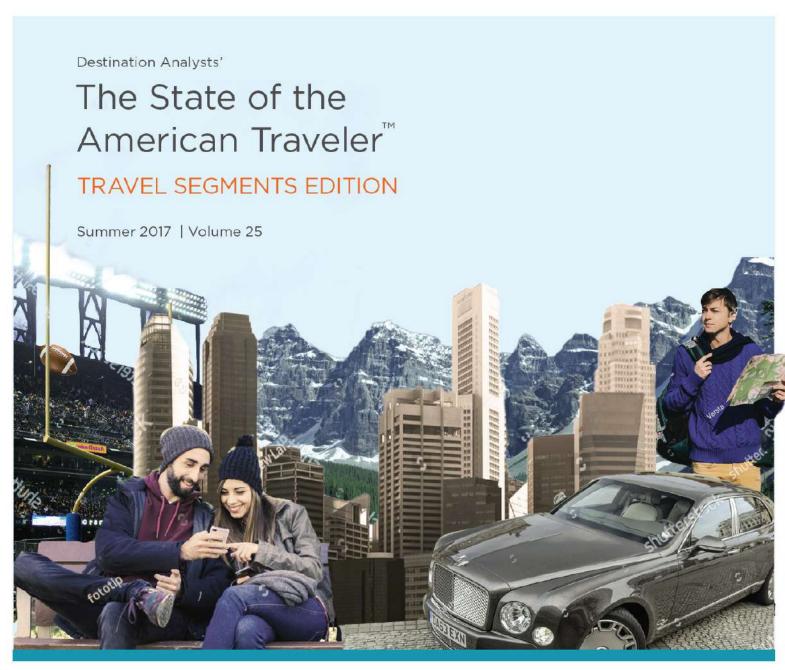


THE STATE OF THE
AMERICAN TRAVELER

TRAVELER SEGMENTS EDITION

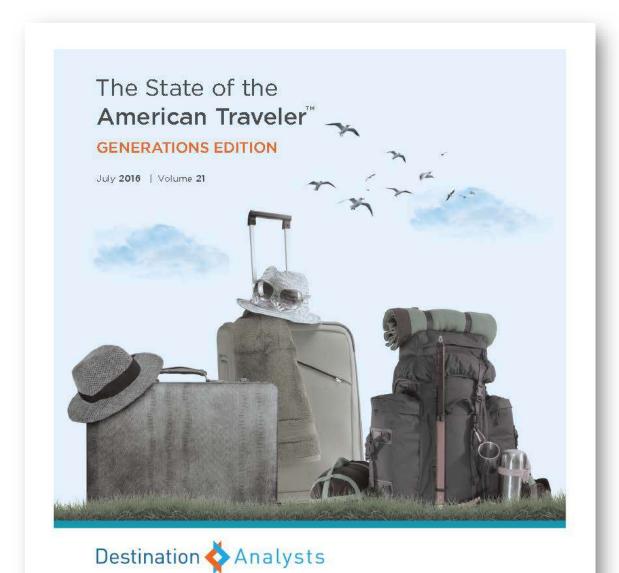


The State of the American Traveler





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



The Generations Edition

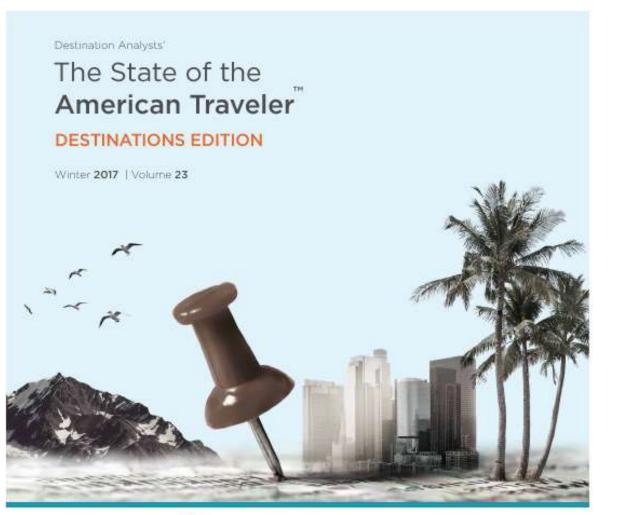
The State of the

MOBILE EDITION

Fall 2016 | Volume 22

American Traveler™

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The State of the American Traveler™

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Spring 2017 | Volume 24



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TRAVEL SEGMENTS EDITION Summer 2017 | Volume 25

Destination **Analysts**

Destination Analysts'

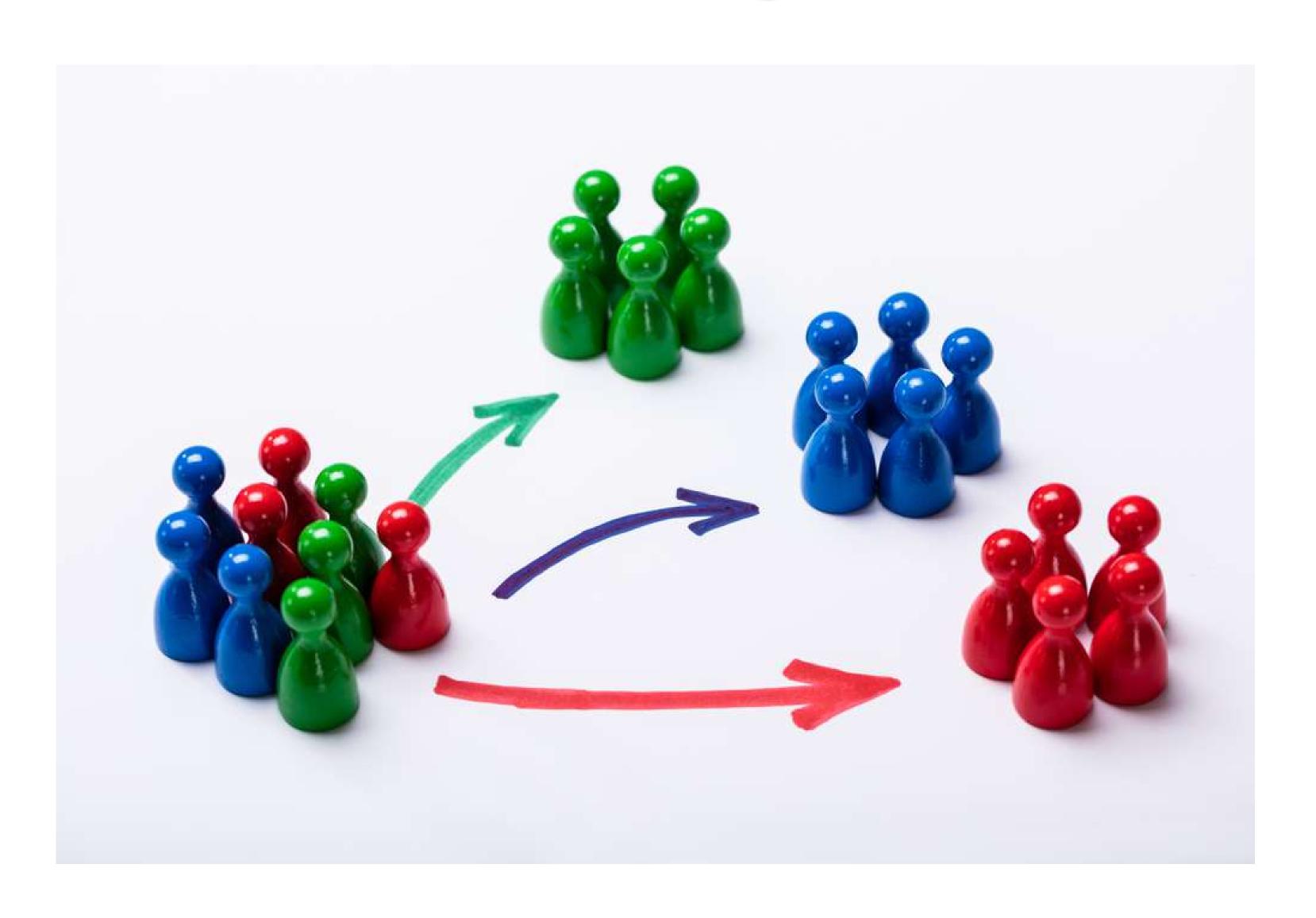
The State of the

American Traveler





Traveler Segments





Generation Z

Travelers between 15 and 23 years of age



National Parks Travelers

Travelers who have visited a National Park on a leisure trip in the past 12 Months



International Travelers

Travelers who have ventured abroad for leisure in the past 12 months



Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months





Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months



Bleisure Travelers

Travelers who have extended a business trip for leisure



Social Media-Influenced Travelers

Travelers who visited a place because social media content influenced them to do so





Generation Z

Travelers between 15 and 23 years of age



^{*} Data presented here includes an oversample which allows us to include travelers 15-17 years of age.



TECH FINANCE POLITICS STRATEGY LIFE INTELLIGENCE ALL

Libby Kane Dec. 4, 2017, 10:08 AM

- Generation Z is the youngest American generation.
- · In many ways, it reflects and amplifies the millennial generation that came before it.
- · It's the most diverse and inclusive generation yet.





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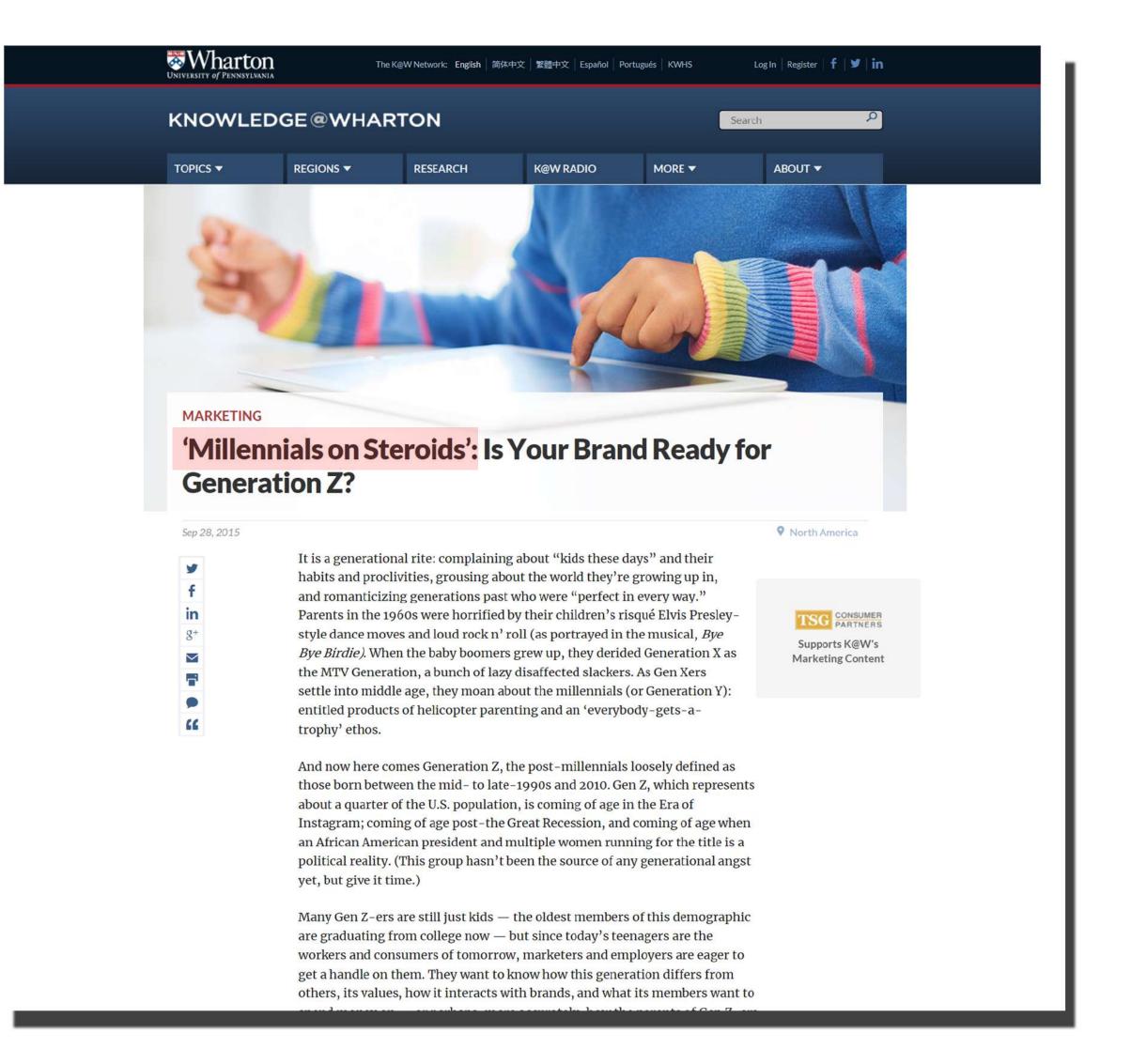
Generation Z is up next.

Gen Z was born between 1998 and 2016, meaning the oldest members are just 19.

That means they're the teenagers entering college, soon to join the workforce and spark their own round of why-young-people-are-the-worst think pieces on the internet.

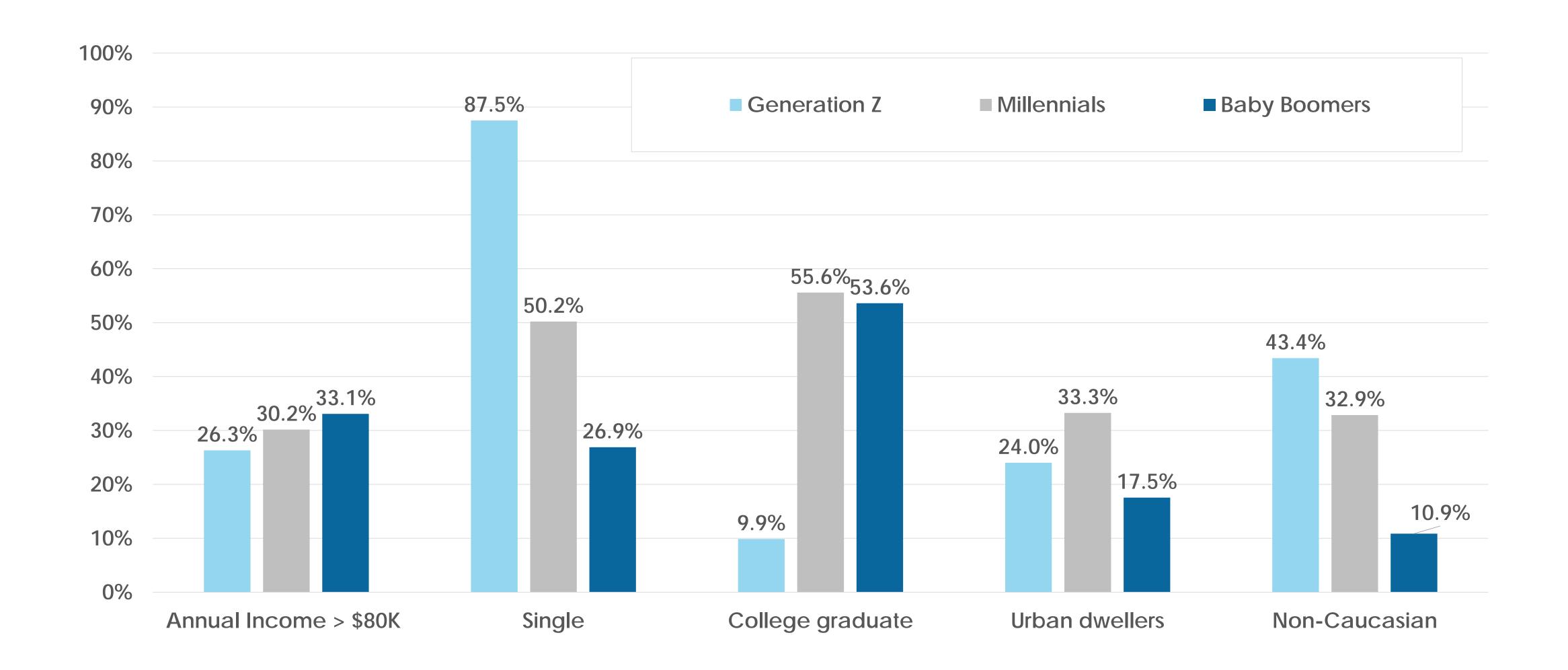
But who are they, really? What can we expect from them? A new report from boutique research firm 747 insights, in partnership with consumer research platform Collaborata, sheds some light on the up-and-coming generation.

The study, called "Generation Nation," surveyed over 4,000 Americans from their late teens to their early 70s to find out how they feel about everything from work to friendships to brands, and analyzed their responses.



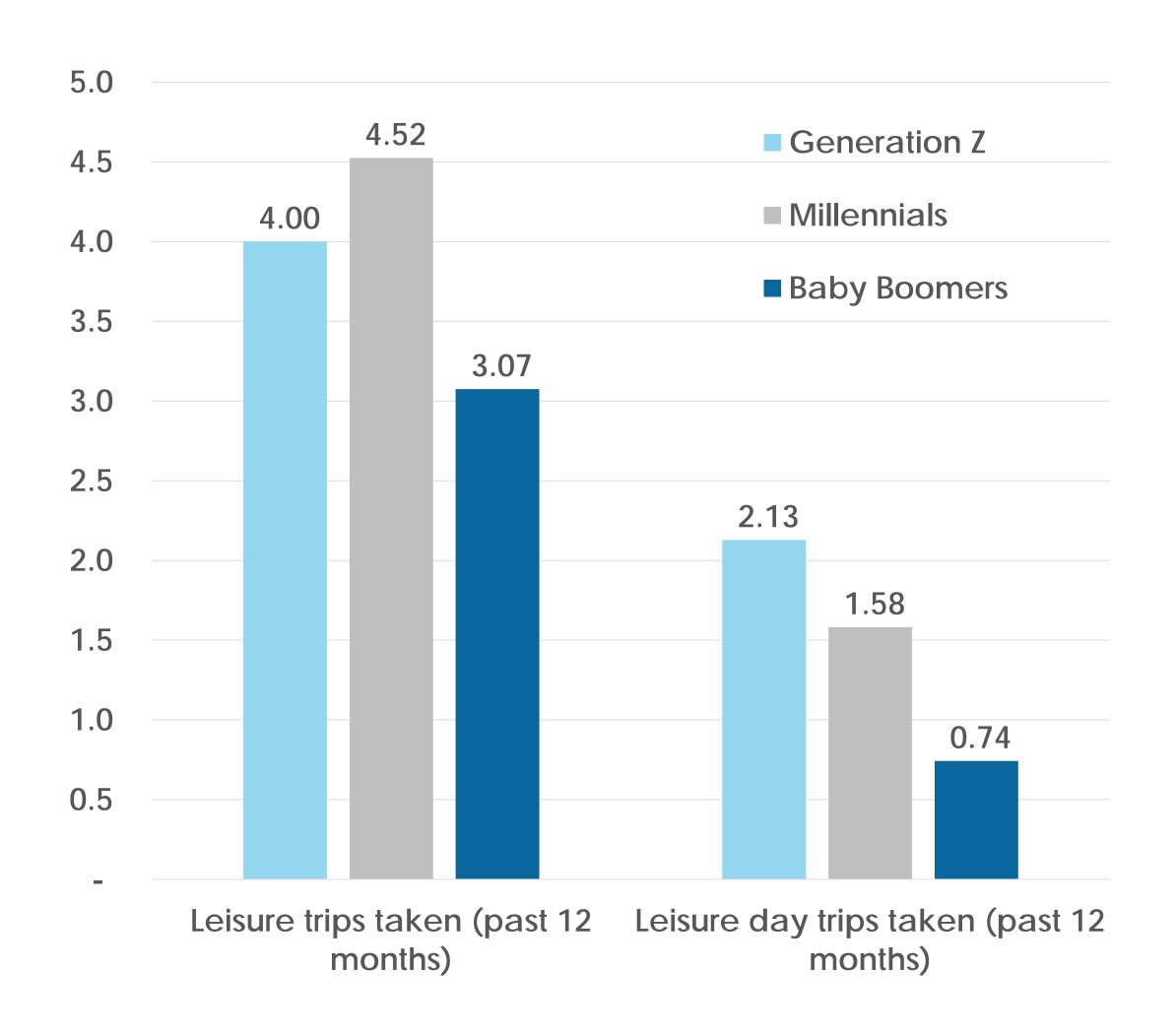


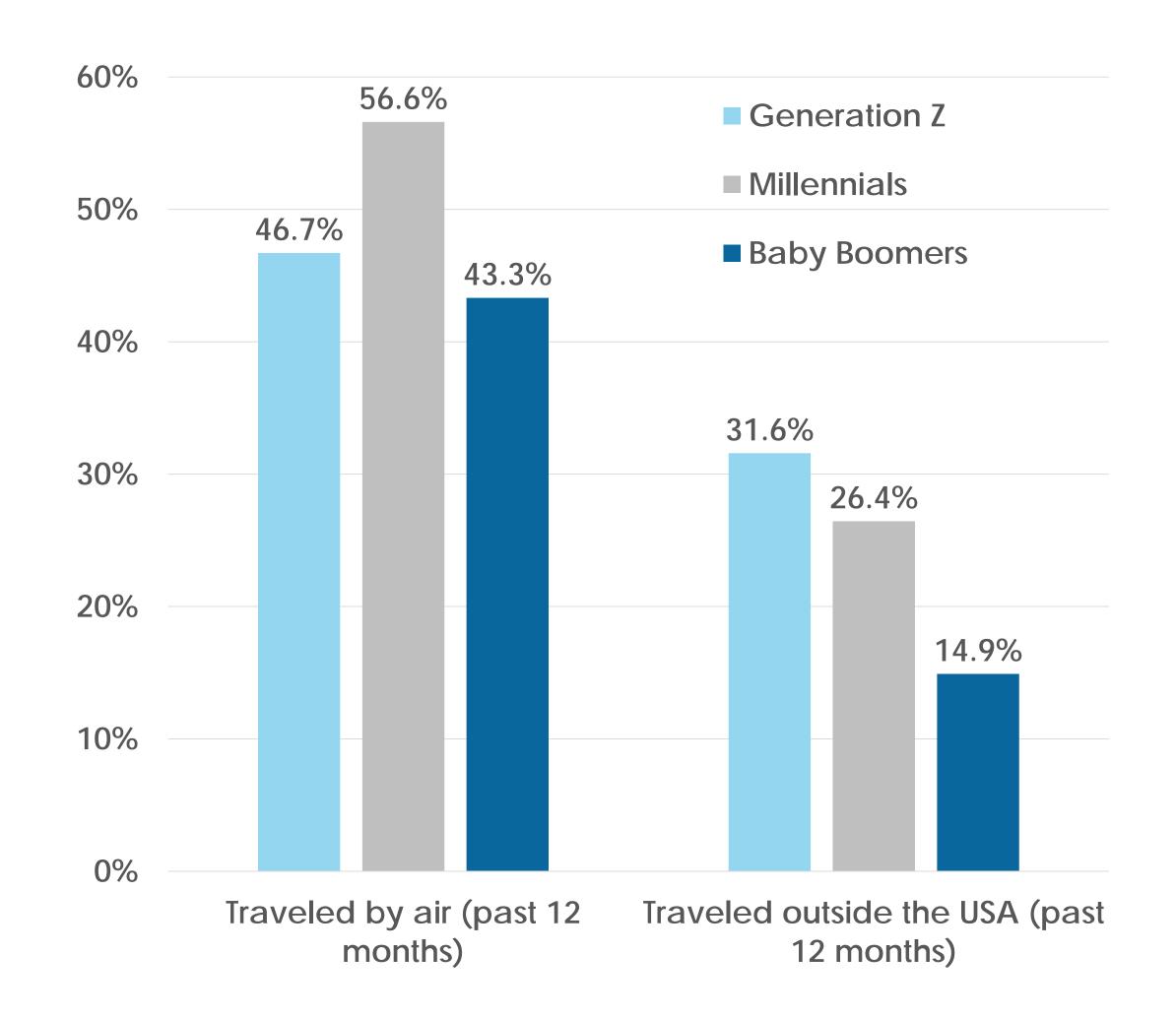
Generation Z: Demographically Different





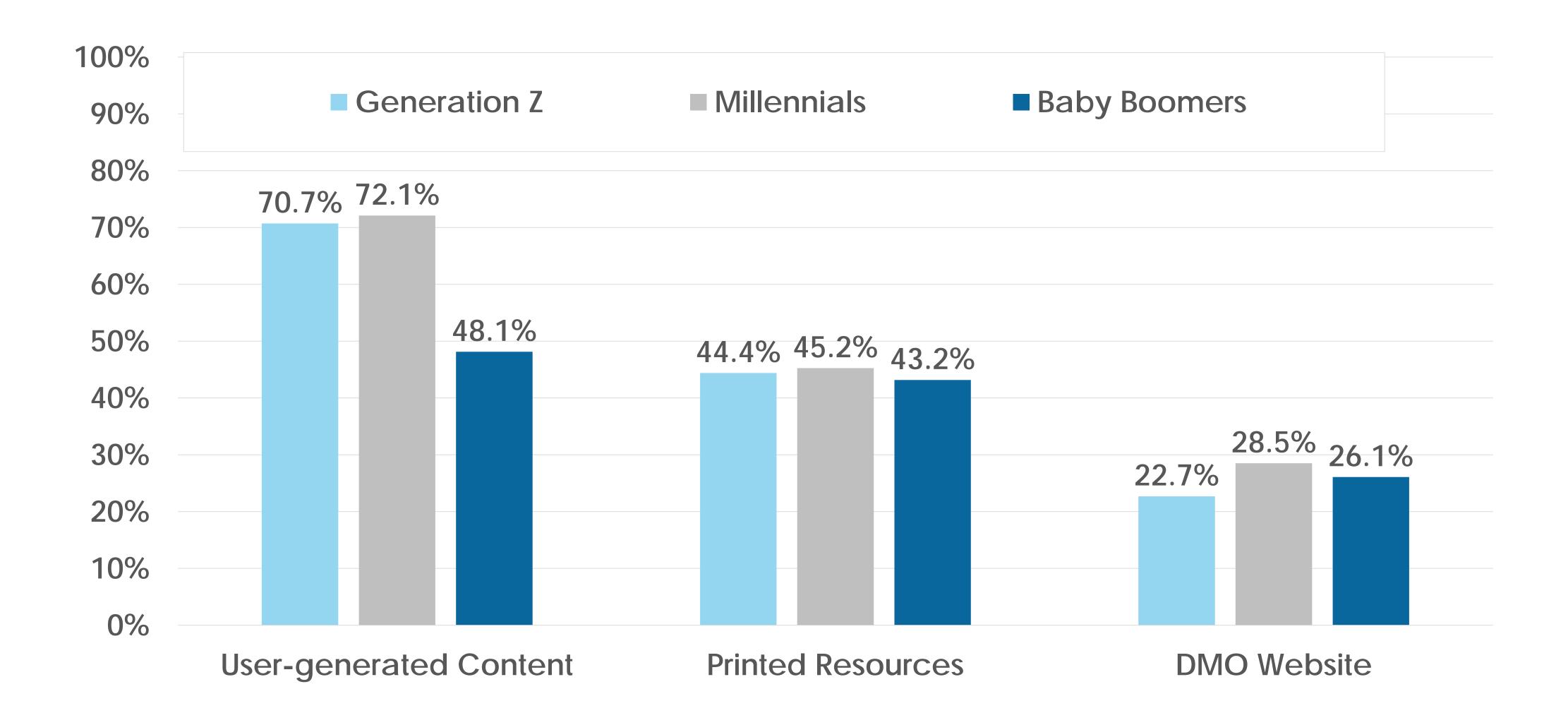
Generation Z: How They Travel







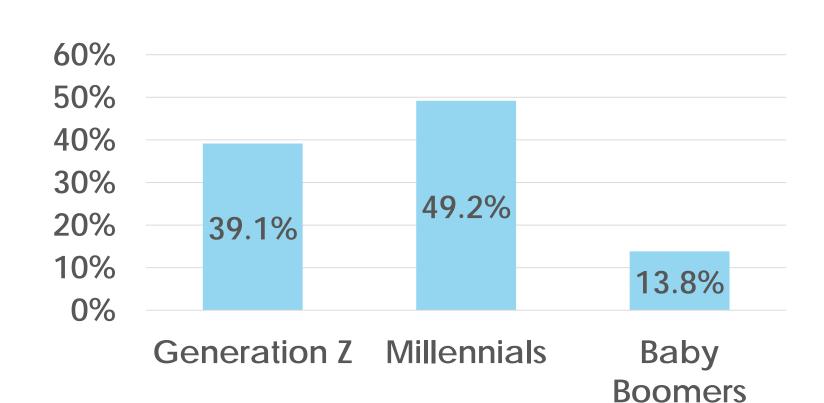
Generation Z: Travel Planning Behaviors



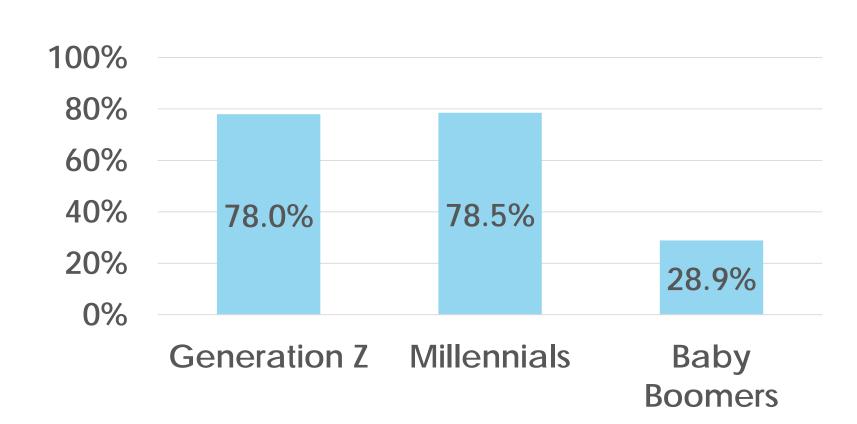


Travel Behaviors: Generation Z

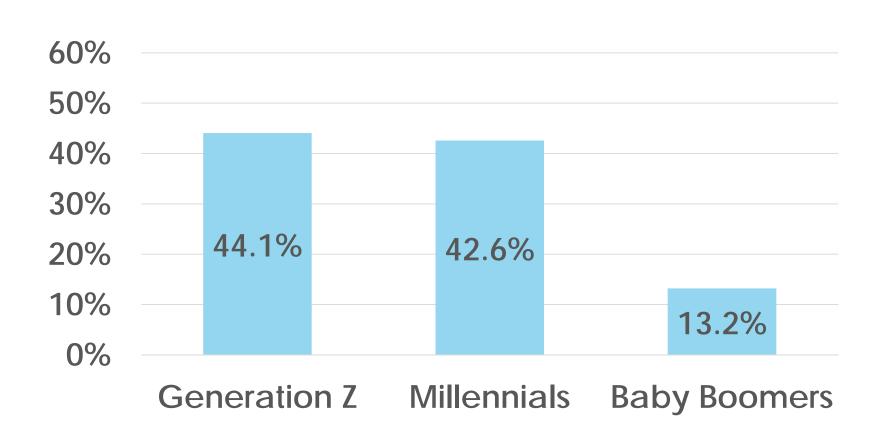
Used Peer-to-Peer Lodging (Past 12 Months)



Used Mobile Phone to Plan Travel (Past 12 Months)

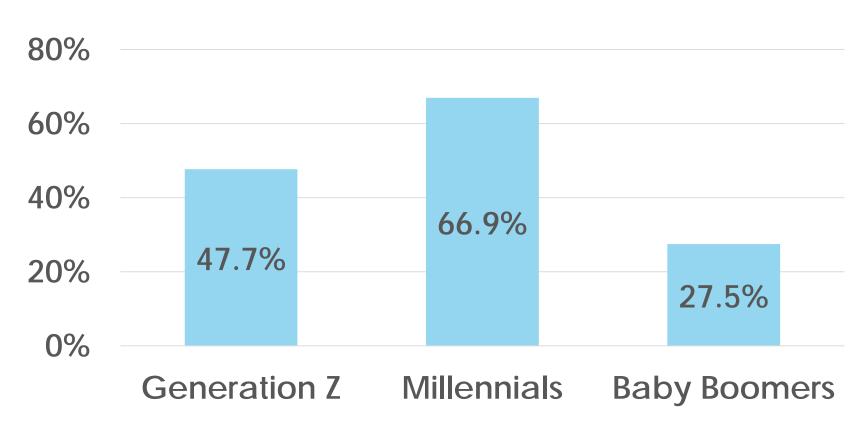


Used Group Discount Website for Travel (Past 12 Months)

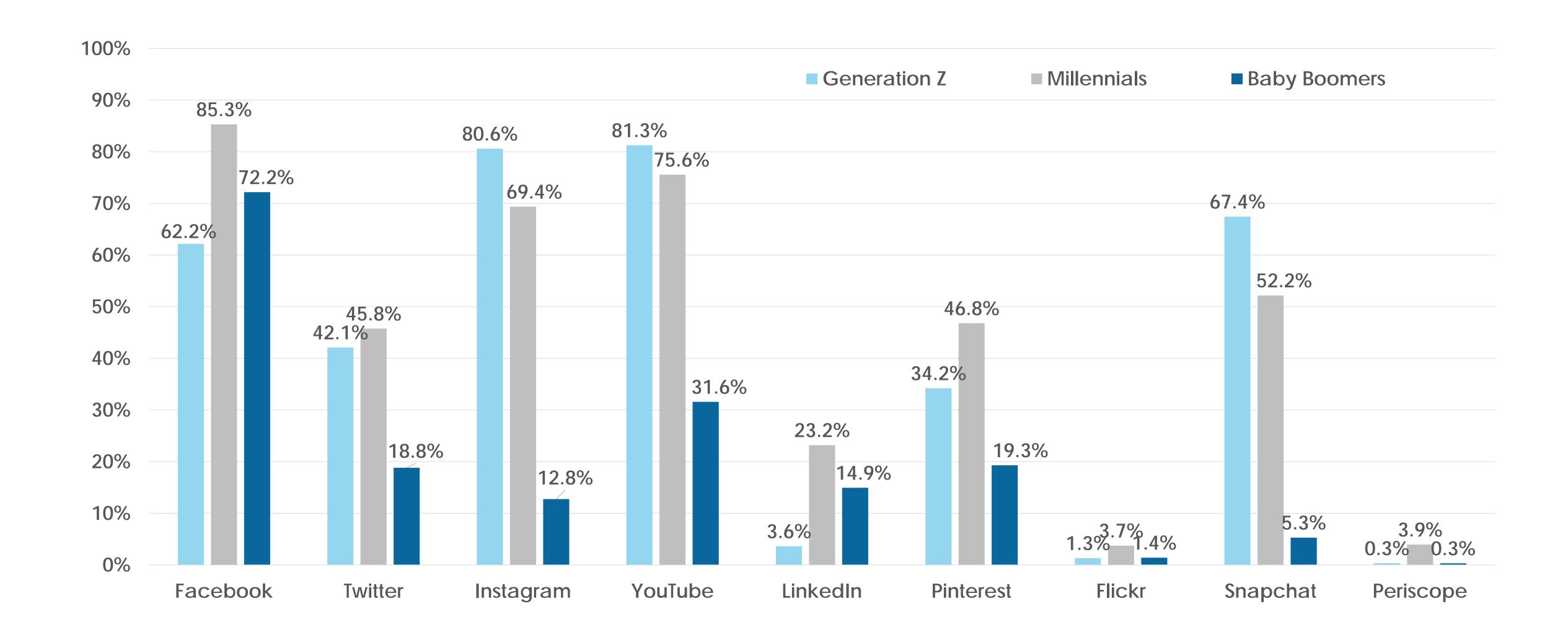


Used Any Social Media to Plan Travel

(Past 12 Months)



Generation Z: Regularly Used Social Media

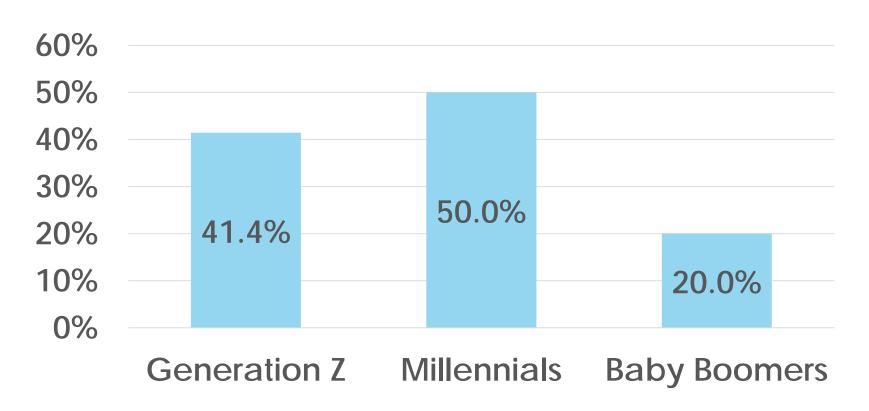




Travel Behaviors: Generation Z

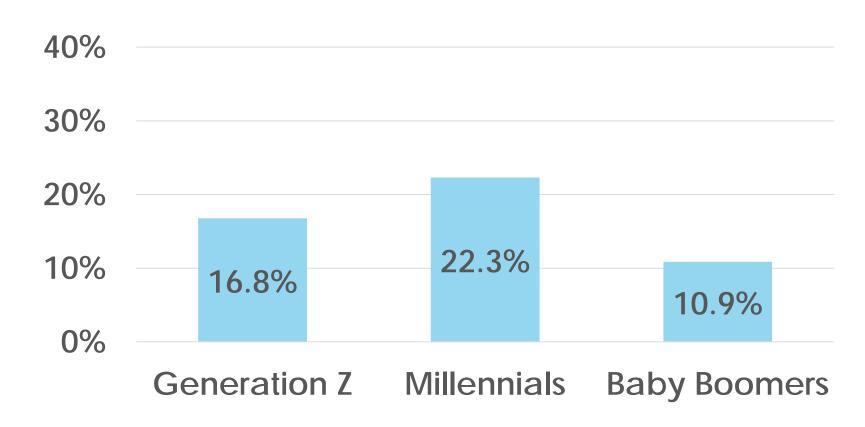
Always Post Pictures When Traveling

(on Social Media)



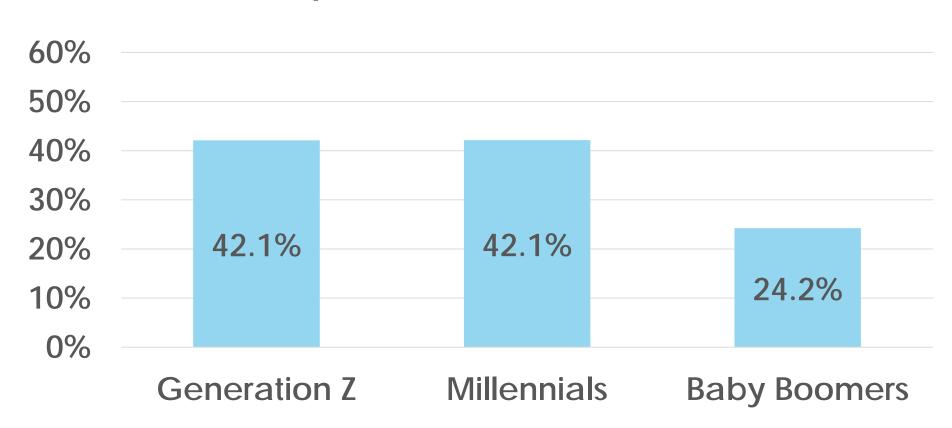
Traveled for a Festival/Special Event

(Past 12 Months)



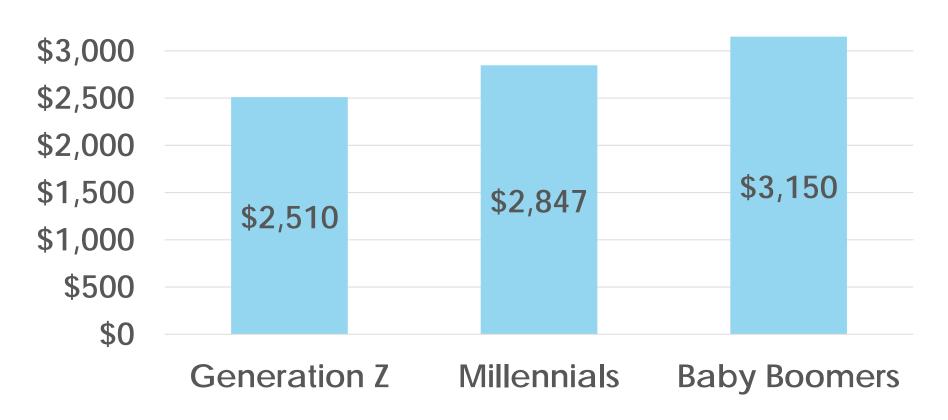
Visited a National Park/Monument

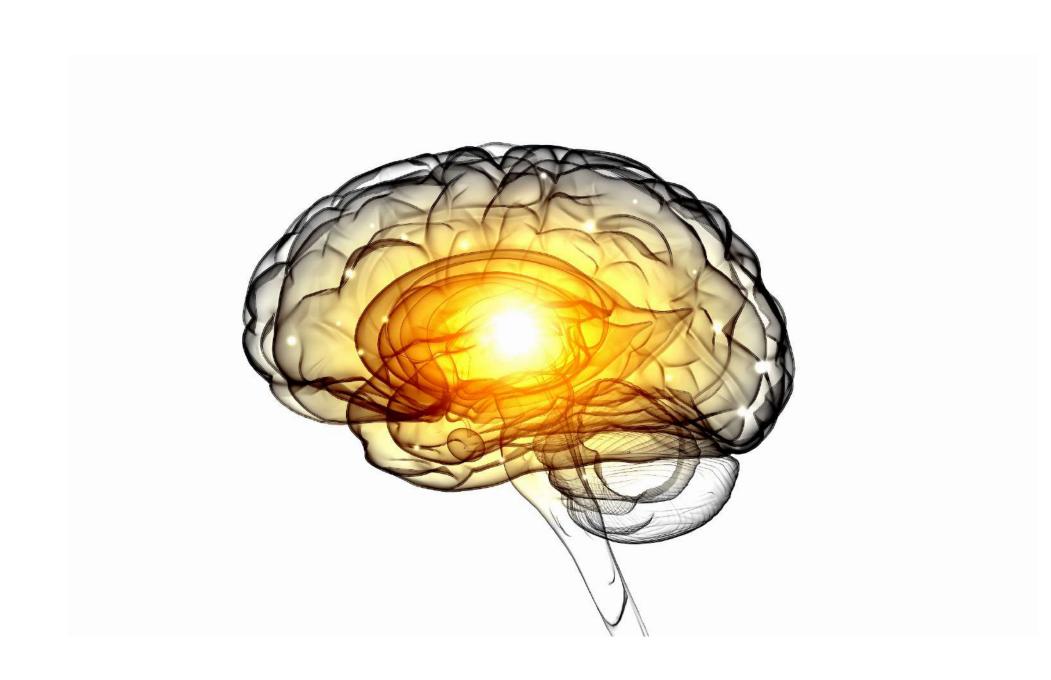
(On a Leisure Trip in the Past 12 Months)



Maximum Annual Travel Budget

(Next 12 Months)



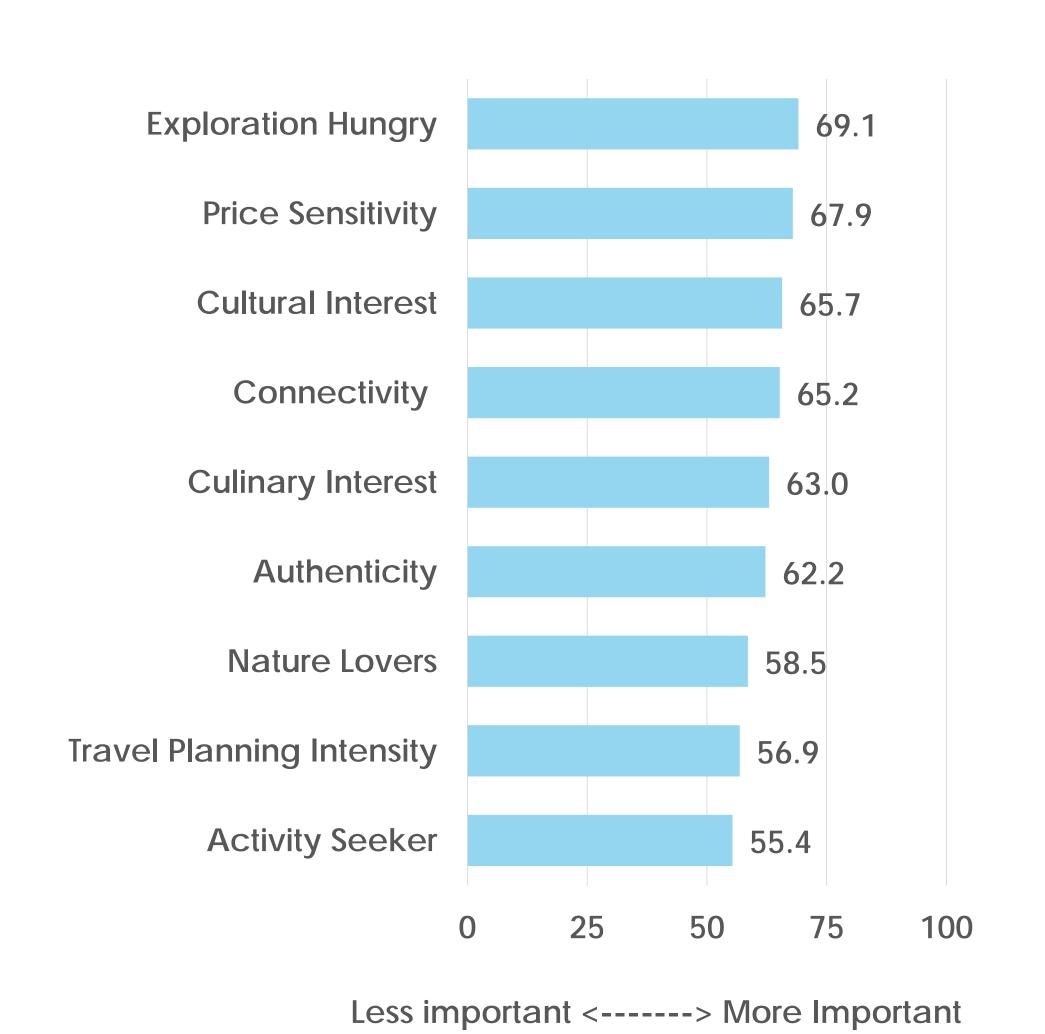


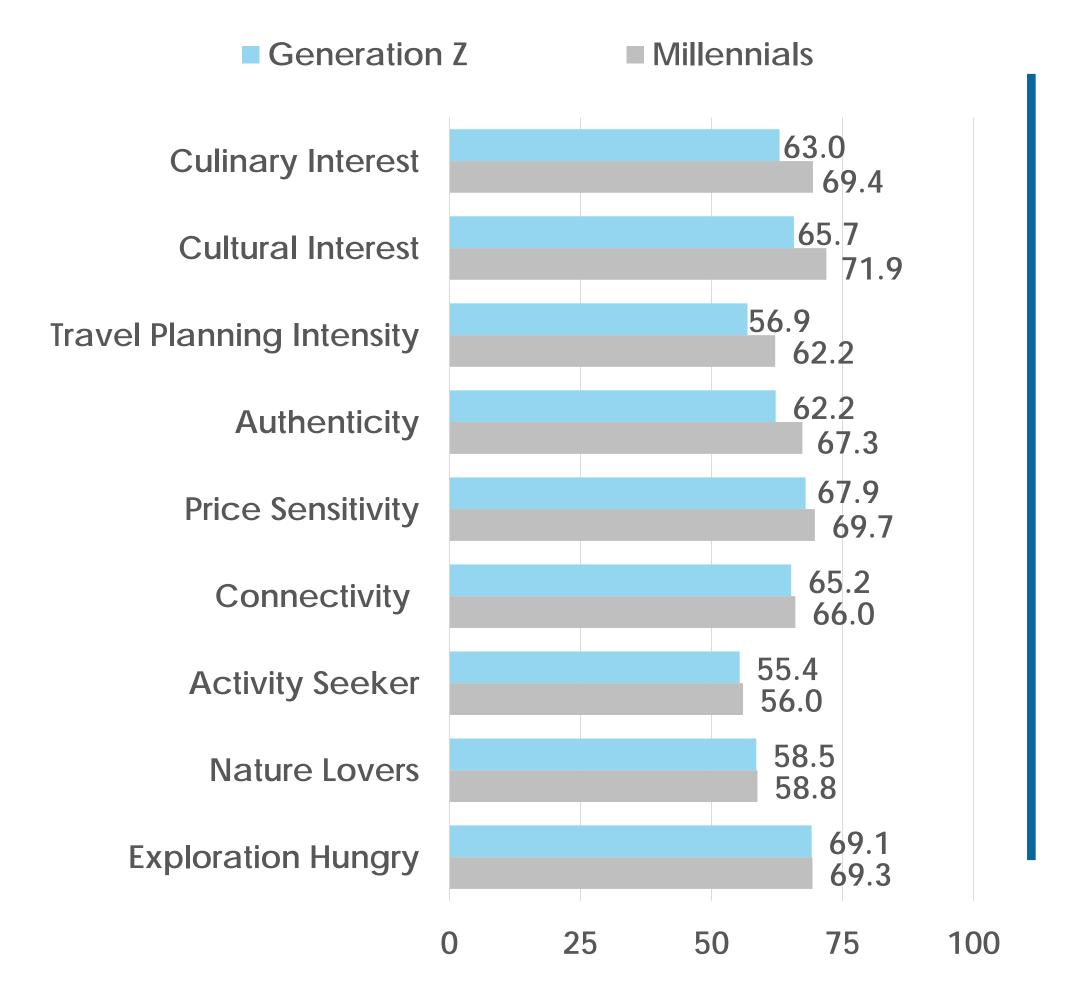
Psychographic Intensity Indices

- Measures the importance of key concepts to travelers
 - Active travel styles
 - Culinary
 - Arts & Culture
 - Connectivity
 - Authenticity
 - Price Sensitivity
 - Travel Planning Intensity
 - Outdoors & Nature
 - Exploration
- Series of questions related to each
- Survey respondents placed on 100 point scale



Psychographics: Generation Z





Less importance for ALL CATEGORIES

Less important <----> More Important

Generation Z

Travelers between 15 and 23 years of age



Takeaways

- 1. Demographically different
 - o Primarily Single
 - Ethnically diverse
 - Lower income and educational attainment
- Lag behind Millennials in travel volume
- Generally similar travel planning habits in resource usage
- 4. Different social media consumption
- Key Psychographics: Exploration,Culture and Price sensitivity
- 6. Our sense: Not fully developed as a travel segment yet





International Travelers

Travelers who have ventured abroad for leisure in the past 12 months

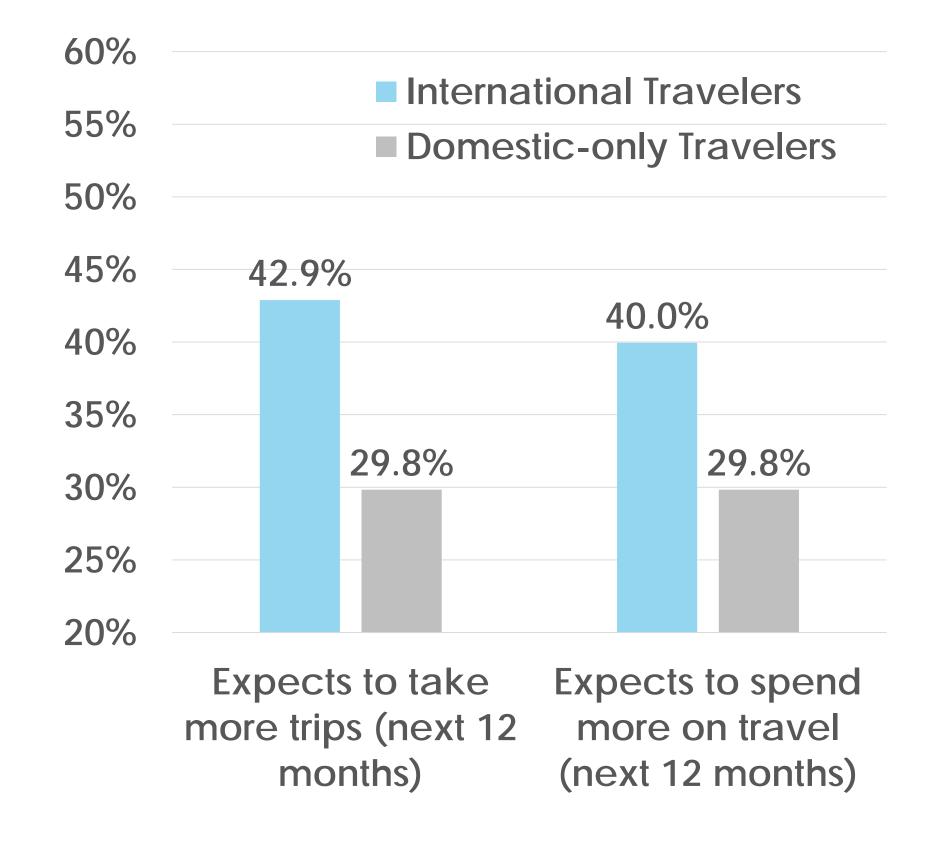
21.2%

of traveling adult Americans



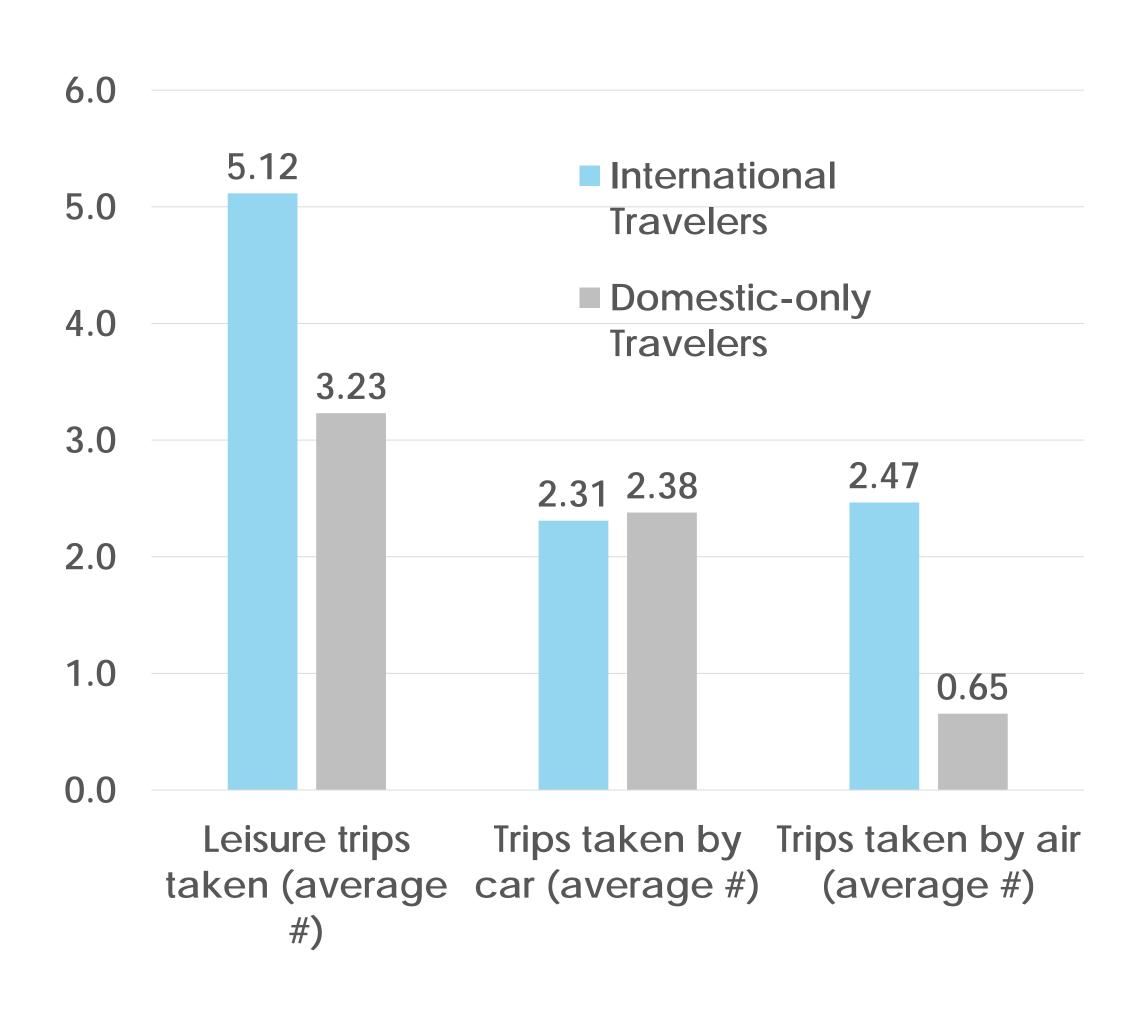
Demographics: International Travelers

| | International Travelers | Domestic-only Travelers |
|-------------------------|----------------------------|----------------------------|
| Average age (years) | 45 | 50 |
| Generation X or younger | 60.8% | 47.7% |
| Annual Income > \$80K | 47.5% | 30.5% |
| Urban Dweller | 37.3% | 21.1% |
| Non-Caucasian | 31.9% | 18.1% |

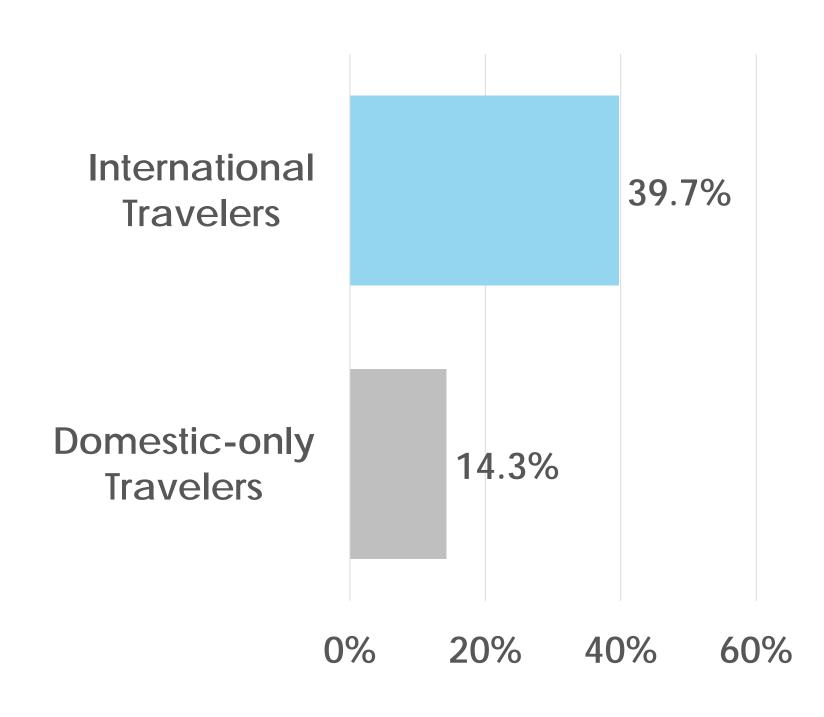




Travel Behaviors: International Travelers

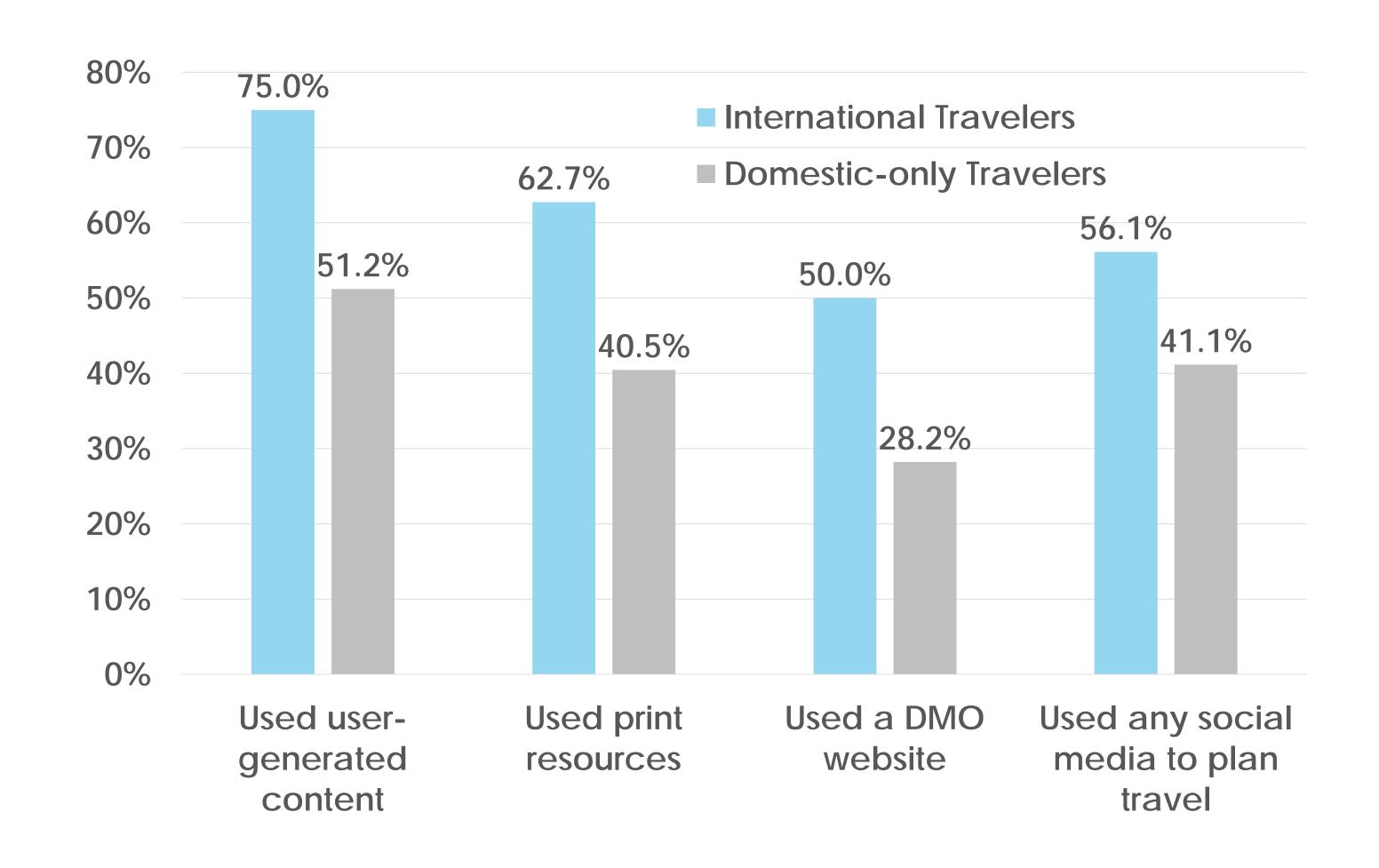


Took at Least One Business/Convention Trip (Past 12 Months)





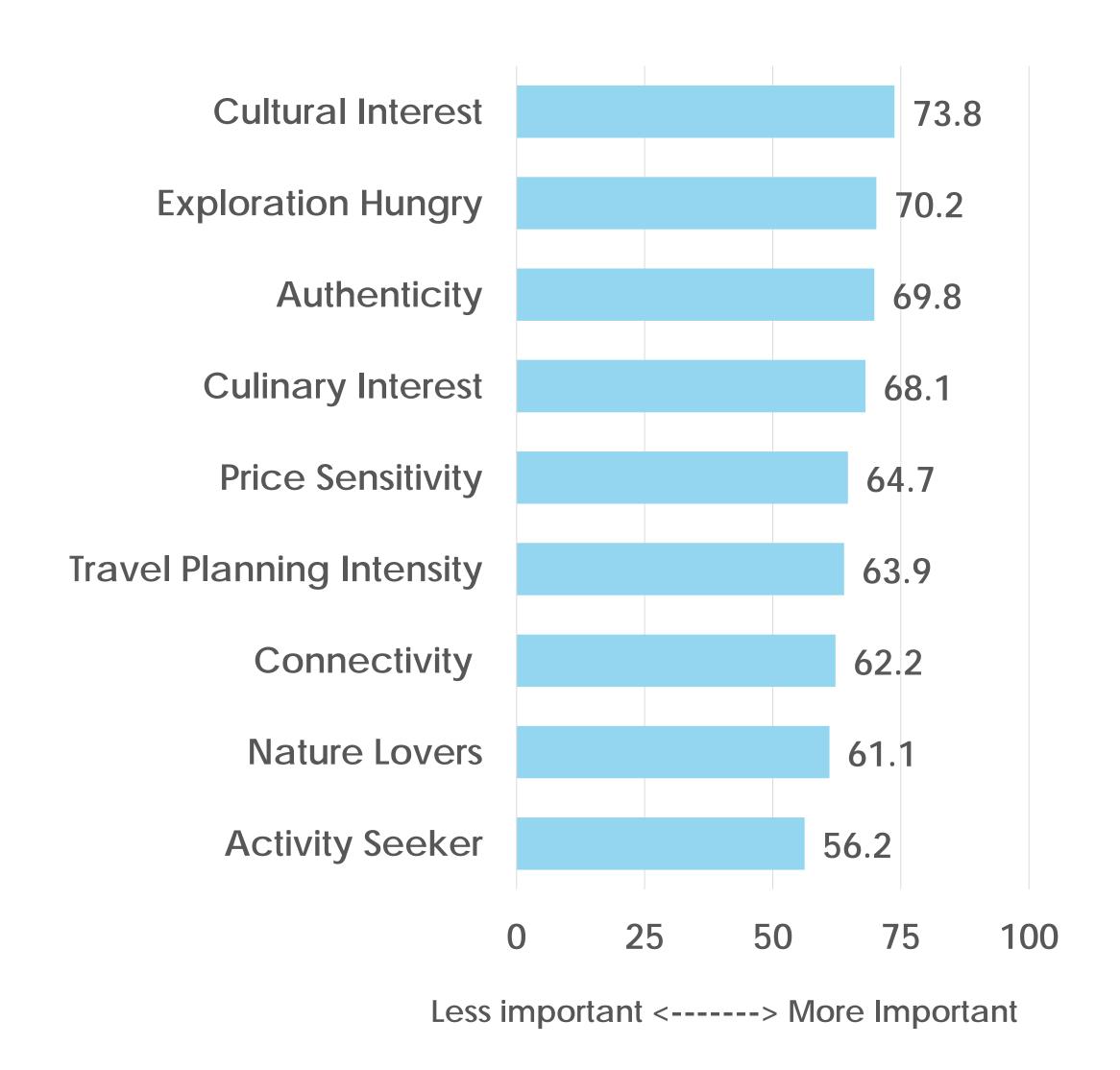
Planning Resources: International Travelers

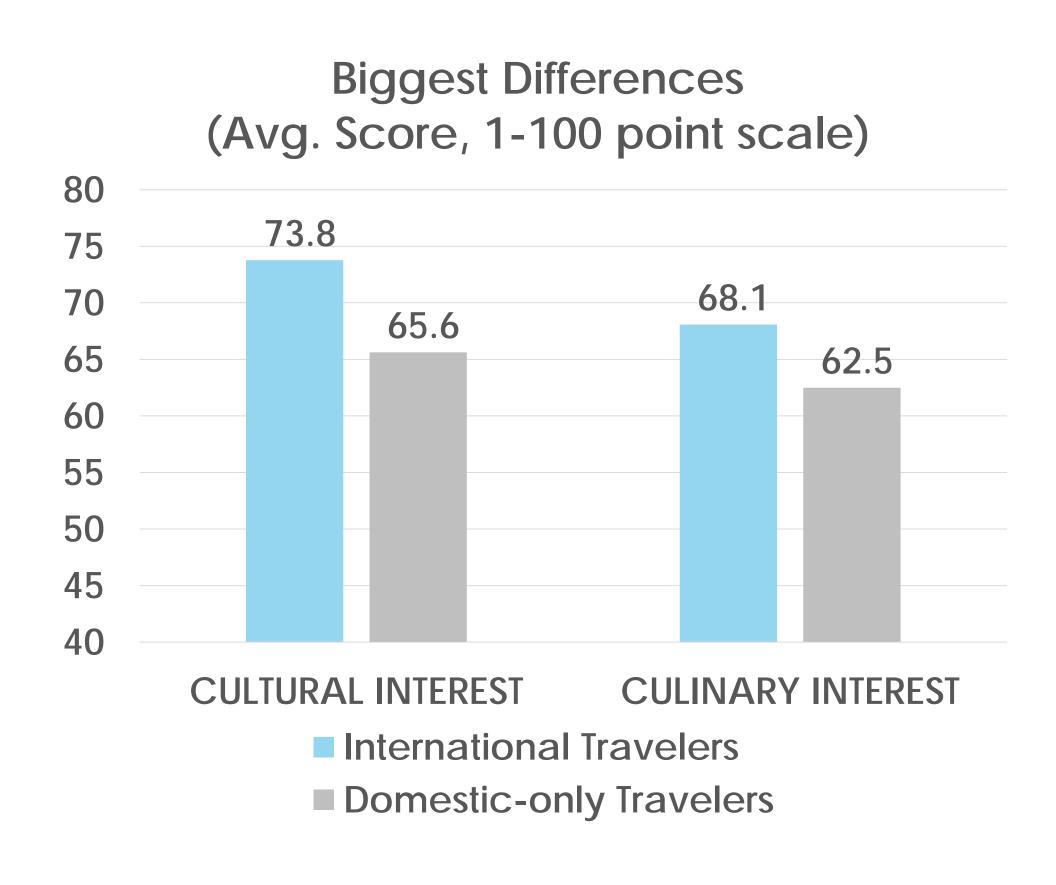


The Quintessential Hyper-Informed Traveler



Psychographics: International Travelers







International Travelers

Travelers who have ventured abroad for leisure in the past 12 months



Takeaways

- 1. Super Gung-Ho for Travel
 - o More trips
 - More spending
 - More enthusiasm for increasing their travels
- 2. Culture and cuisine focused
- 3. The Quintessential Hyper-Informed Traveler





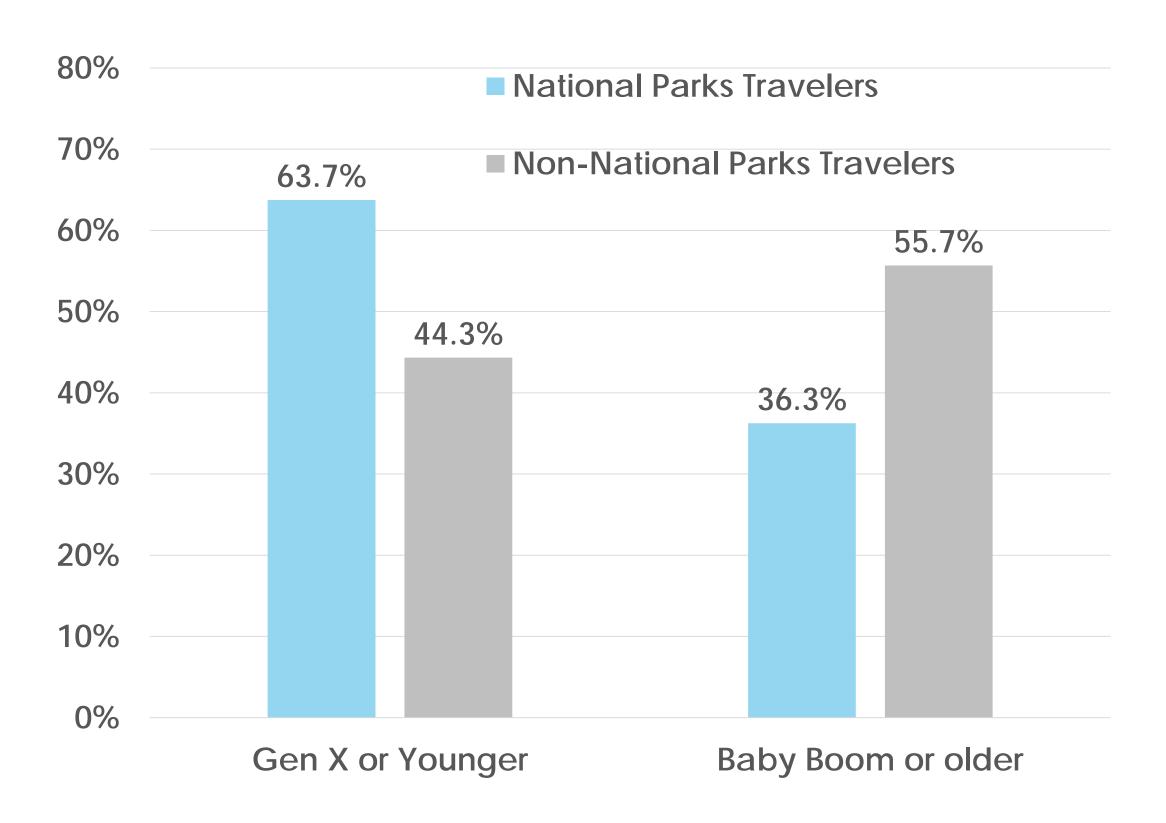
Travelers who have visited a National Park on a leisure trip in the past 12 Months

32.1%

of traveling adult Americans



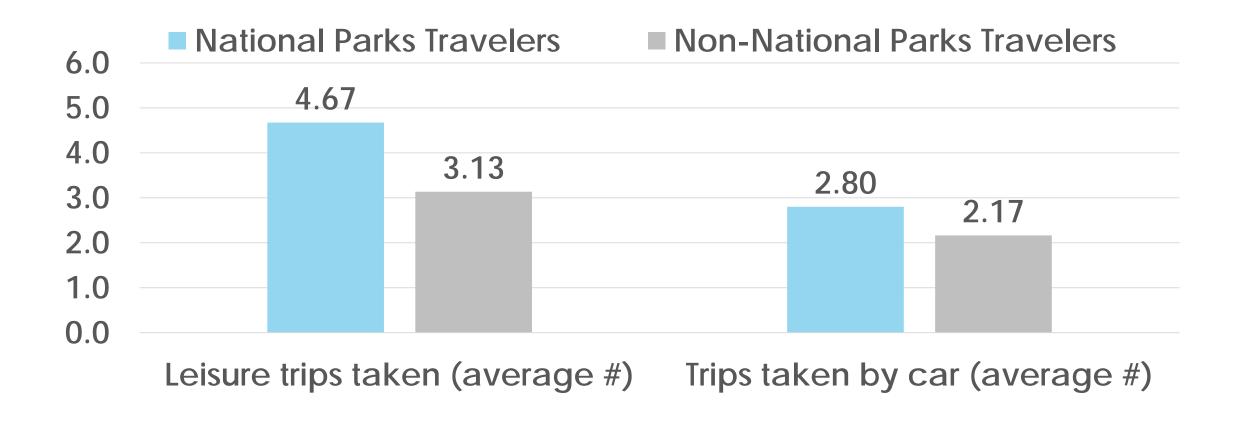


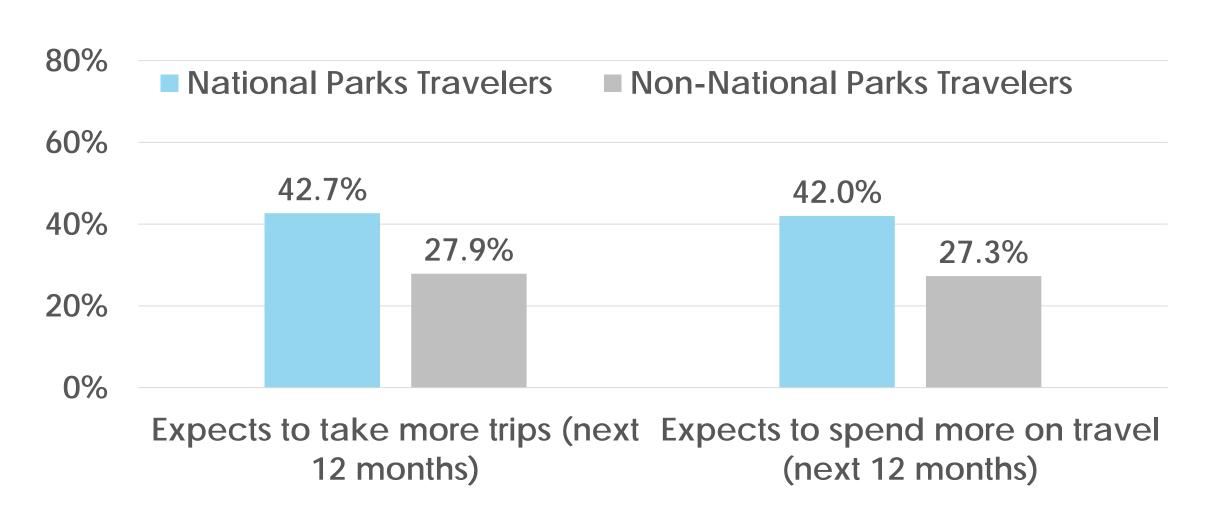


National Parks Travelers Average Age 44 Non-National Parks Travelers Average Age 51



Frequent, highly enthusiastic travelers...

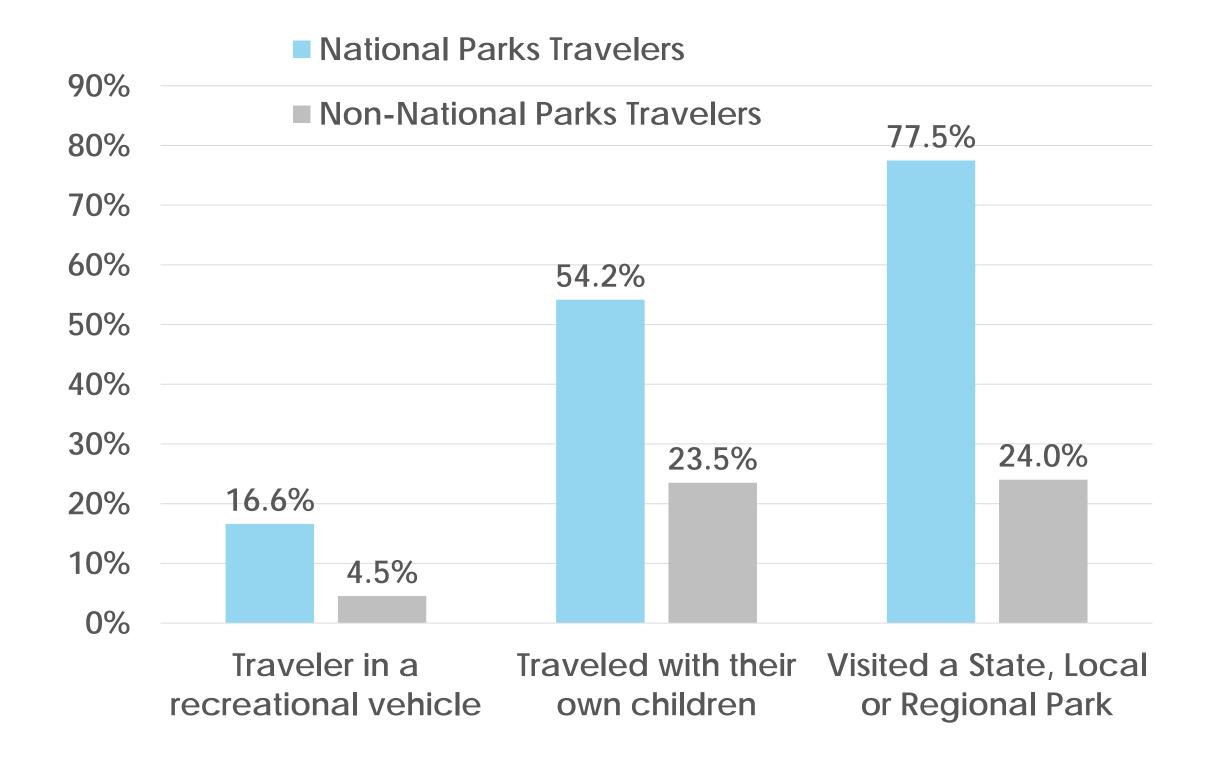








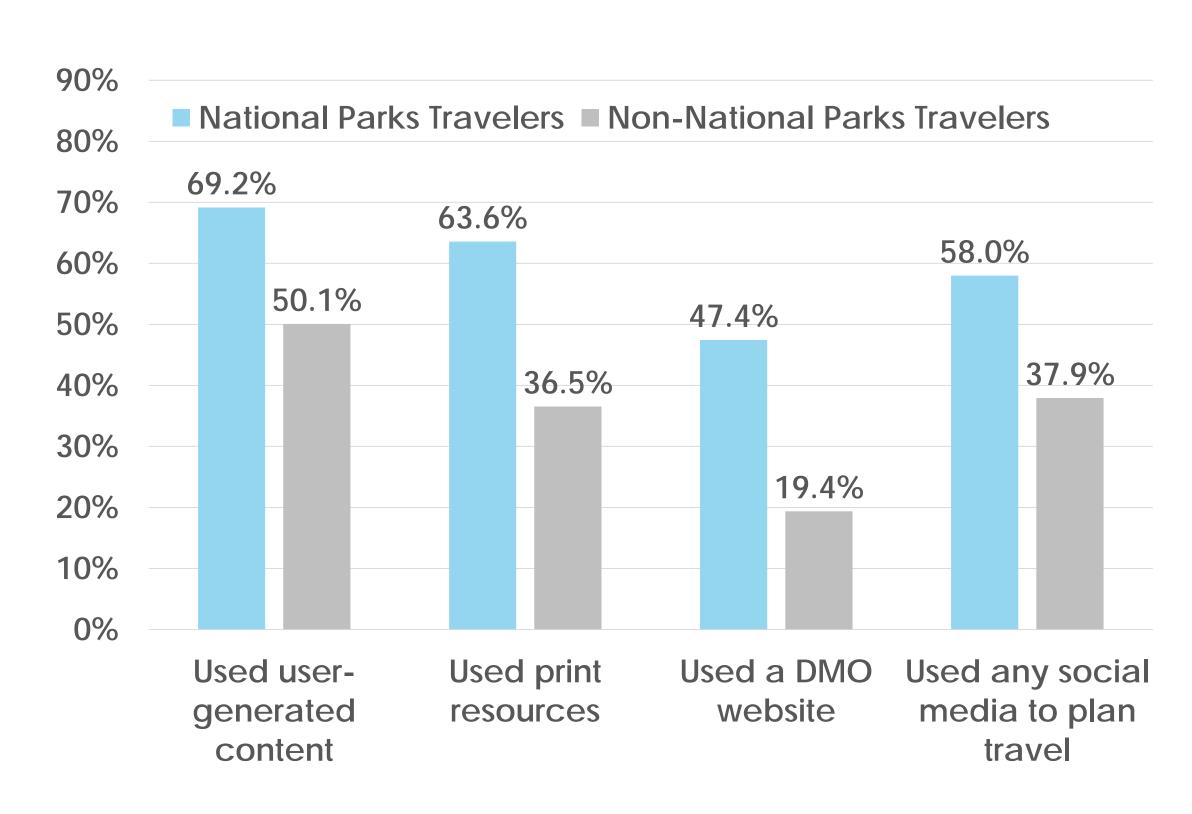




Travel Activities in the Past 12 Months



National Parks Travelers

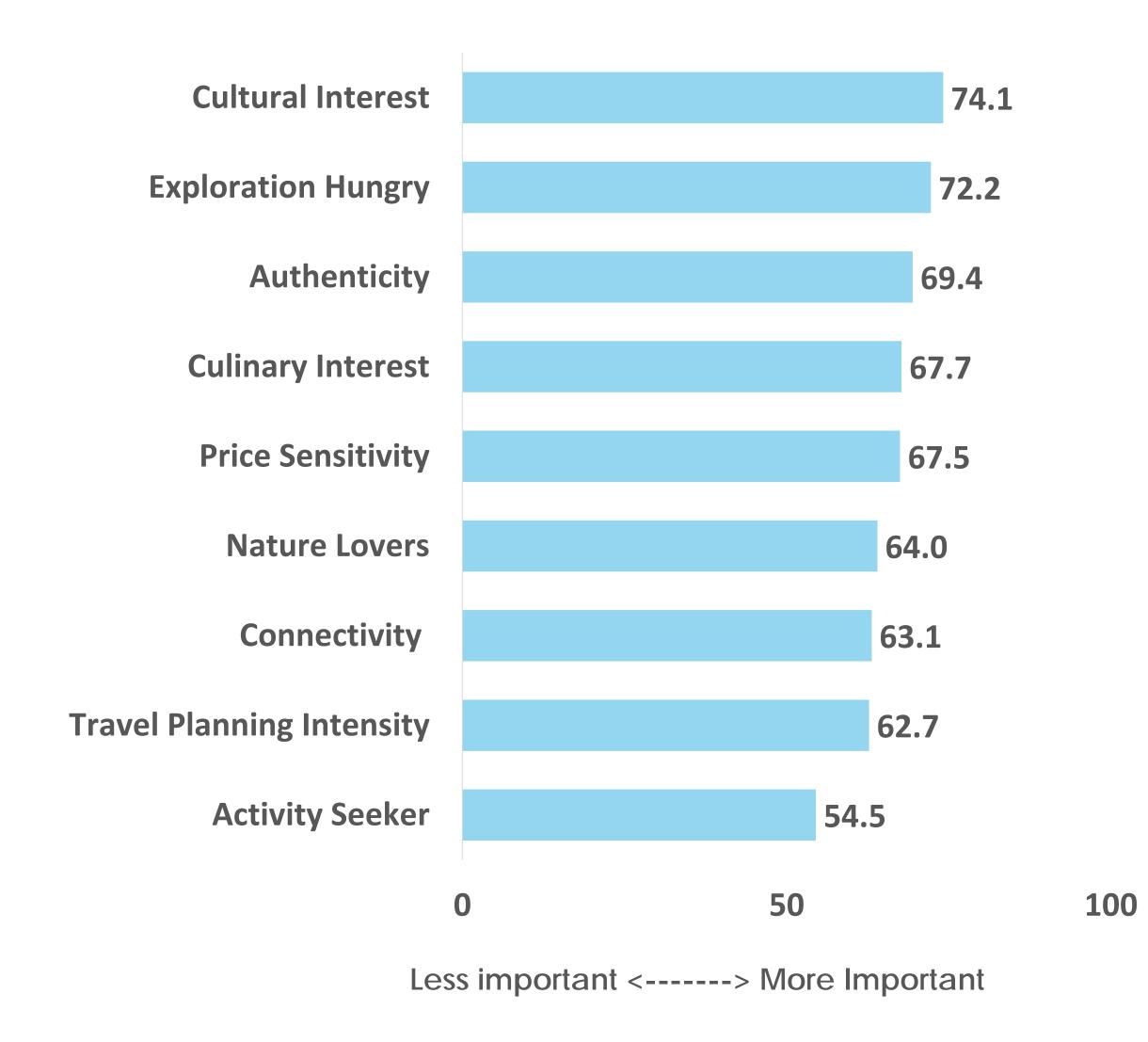


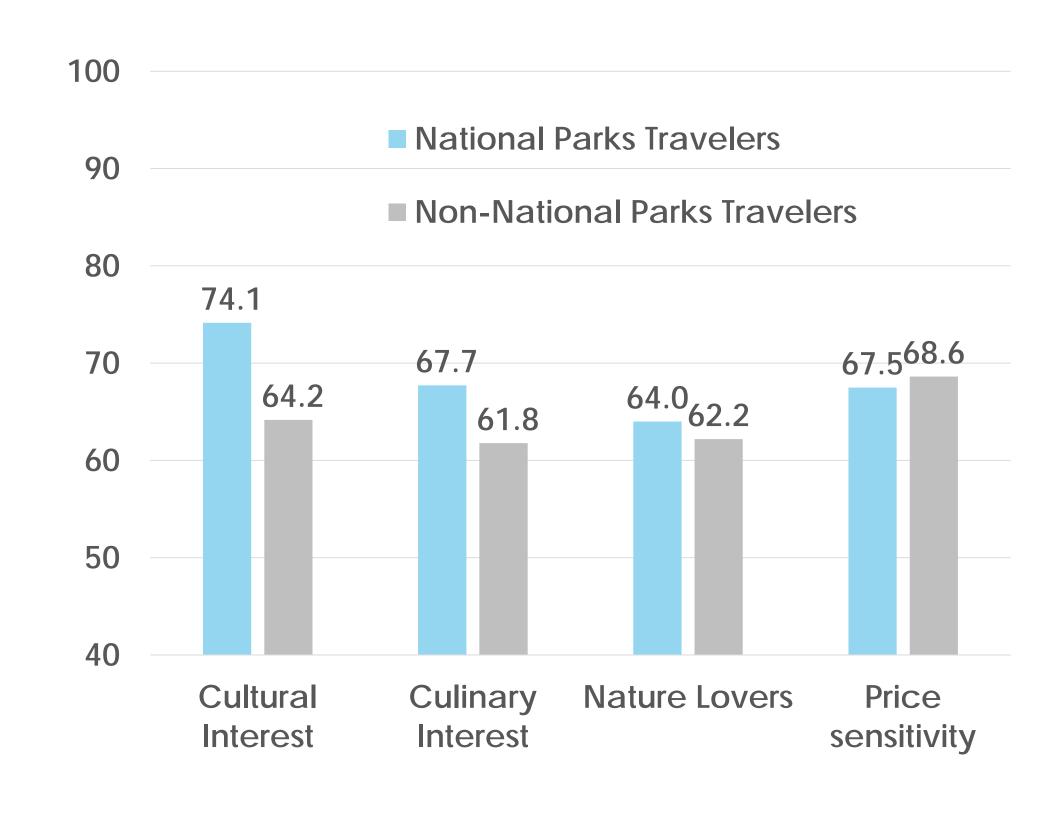
Travel Planning Resources Used in Past 12 Months





Psychographics: National Parks Travelers







National Parks Travelers

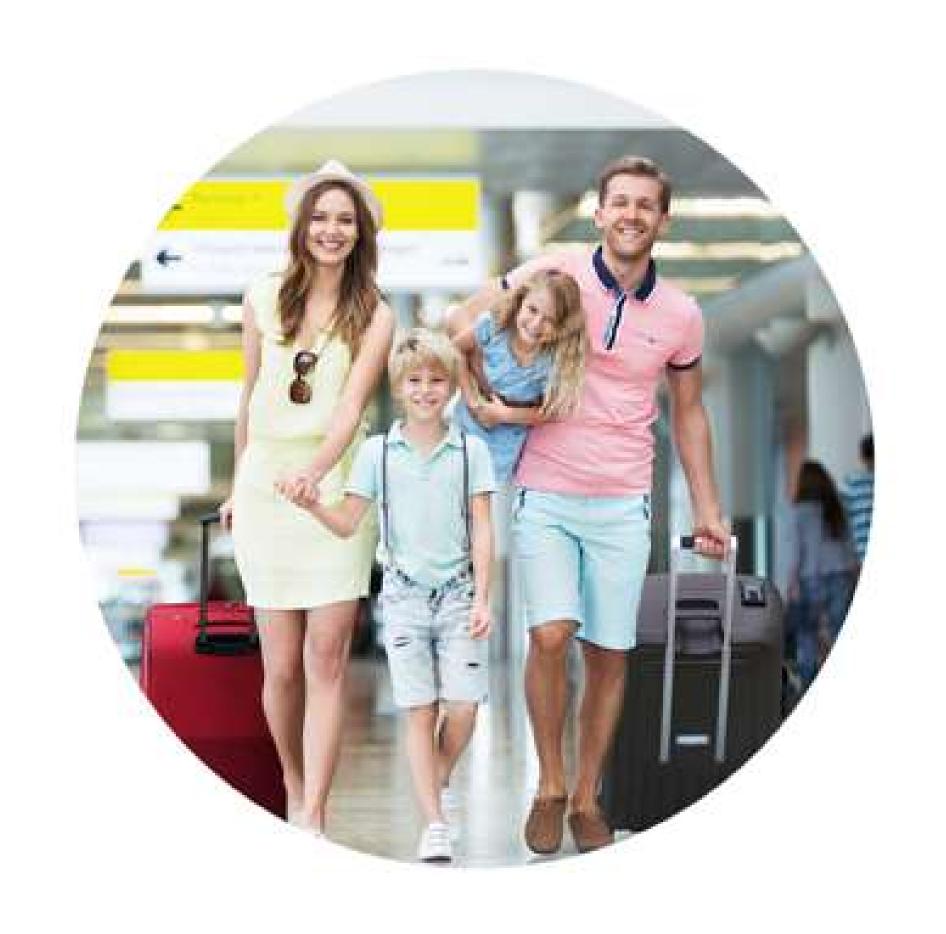
Travelers who have visited a National Park on a leisure trip in the past 12 Months



Takeaways

- 1. Large, frequent traveling segment
- 2. Skew younger in age
- 3. Includes many family travelers
- 4. Hyper-informed traveler behaviors
- 5. Other parks are important to them
- Defy stereotypes with interest in culture and cuisine





Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months

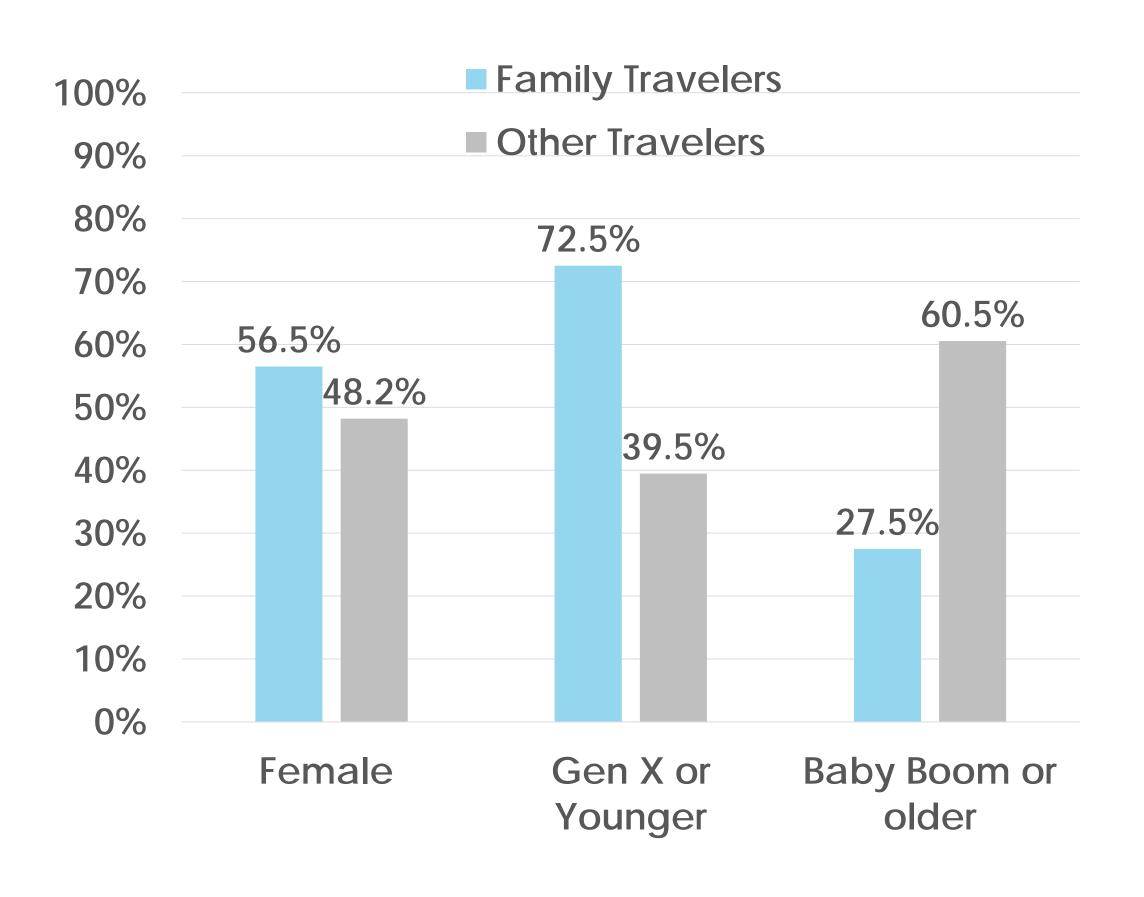
33.9%

of traveling adult Americans



Demographics: Family Travelers

Younger and female skew



Family Travelers

41 Average Age

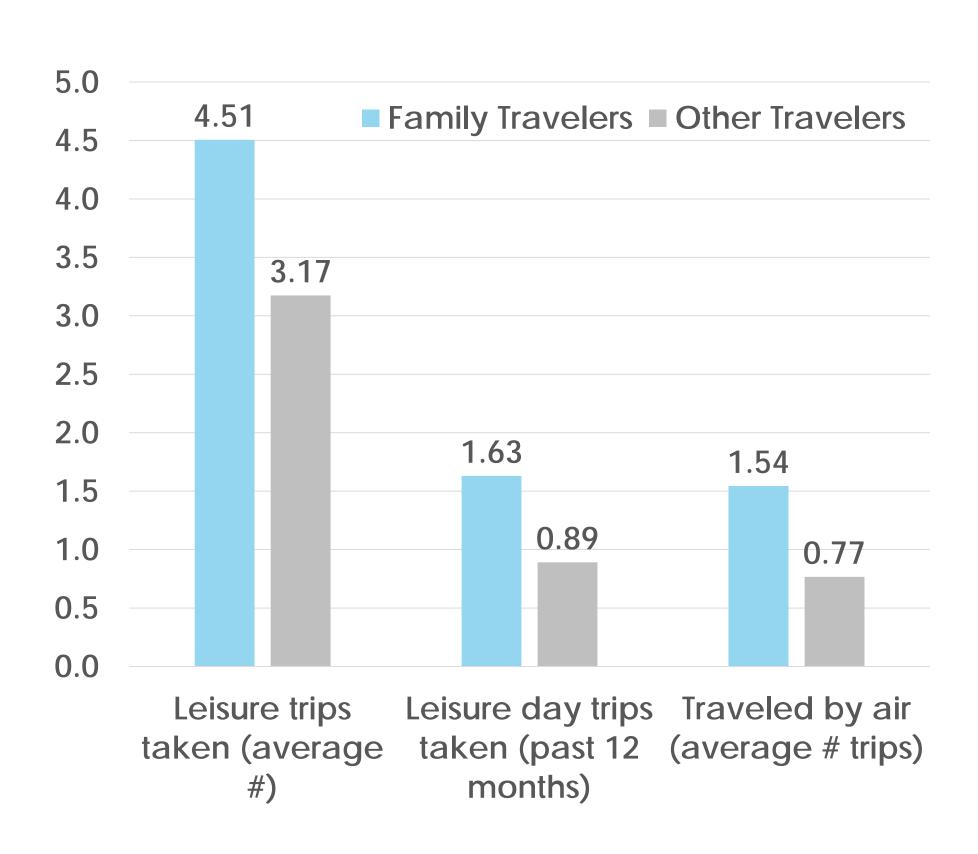
Other Travelers

53 Average Age



Family Travelers are Super Travelers

Trips Taken in Past Year



Traveled Outside the USA

Family Travelers

30.1%

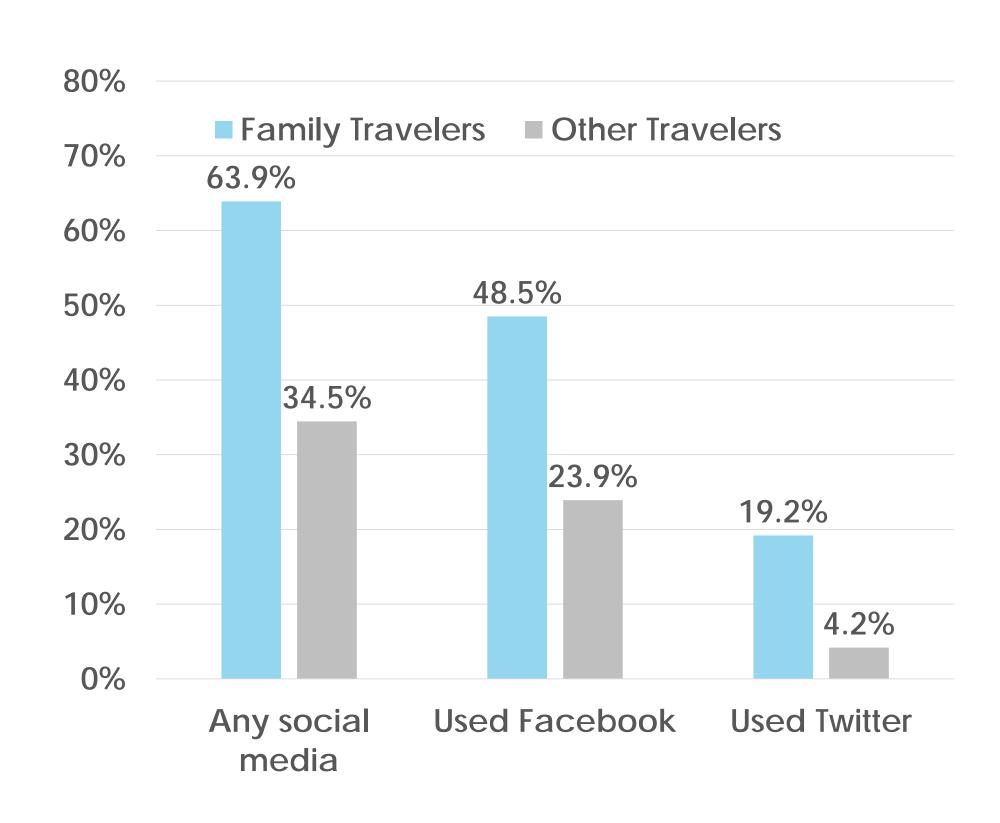
Other Travelers

15.6%

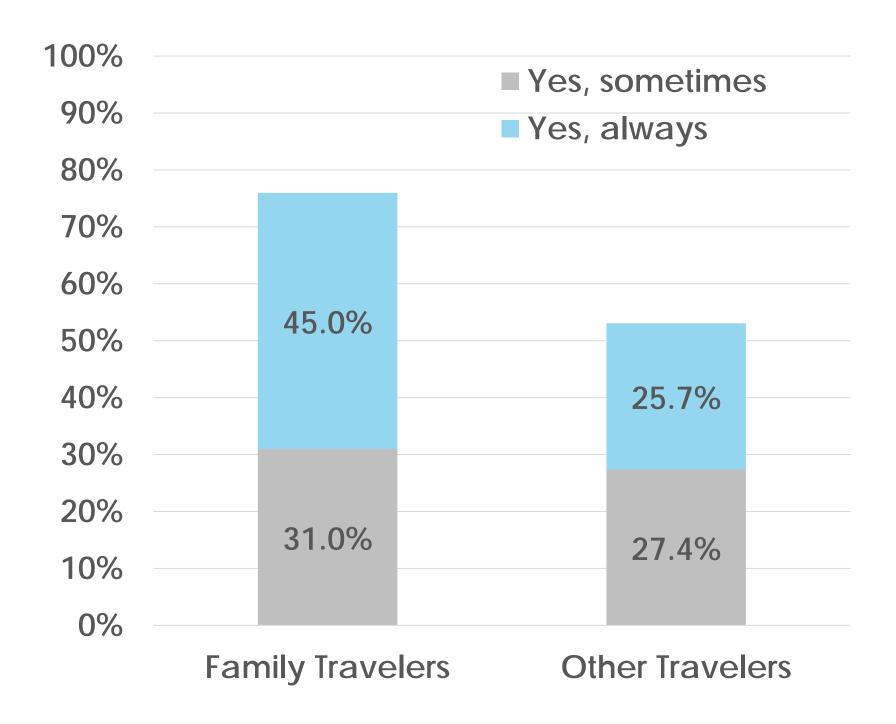


Families are Super Social Travelers

Resources Used in Travel Planning



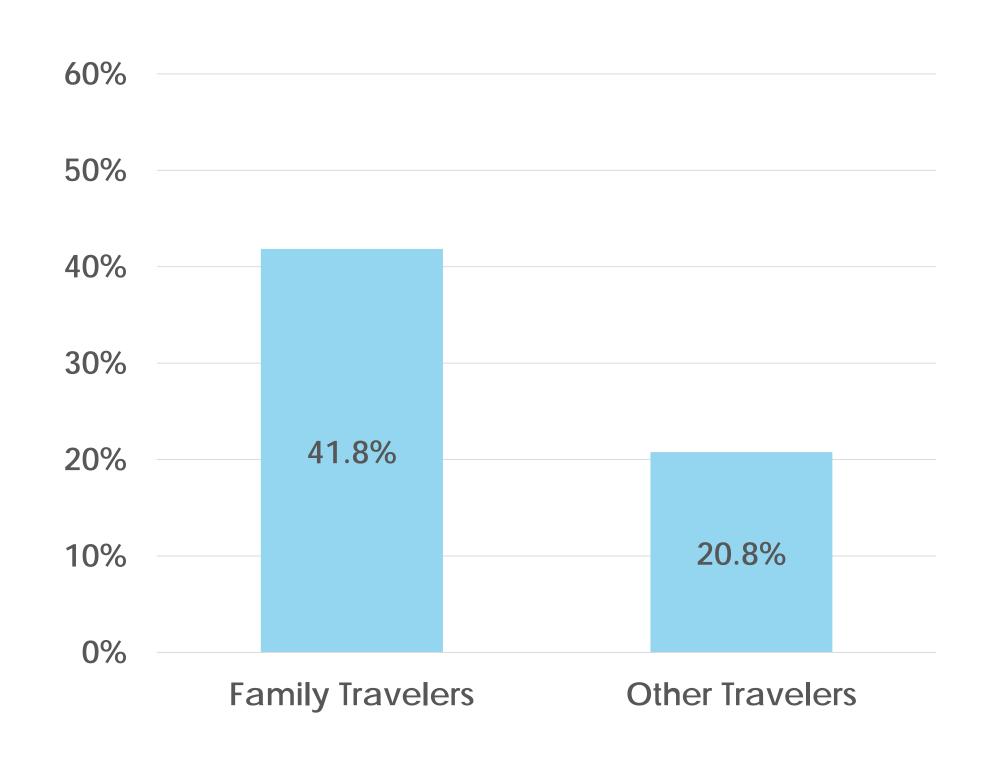
Question: When traveling for leisure, do you take photos/videos to share on social media?





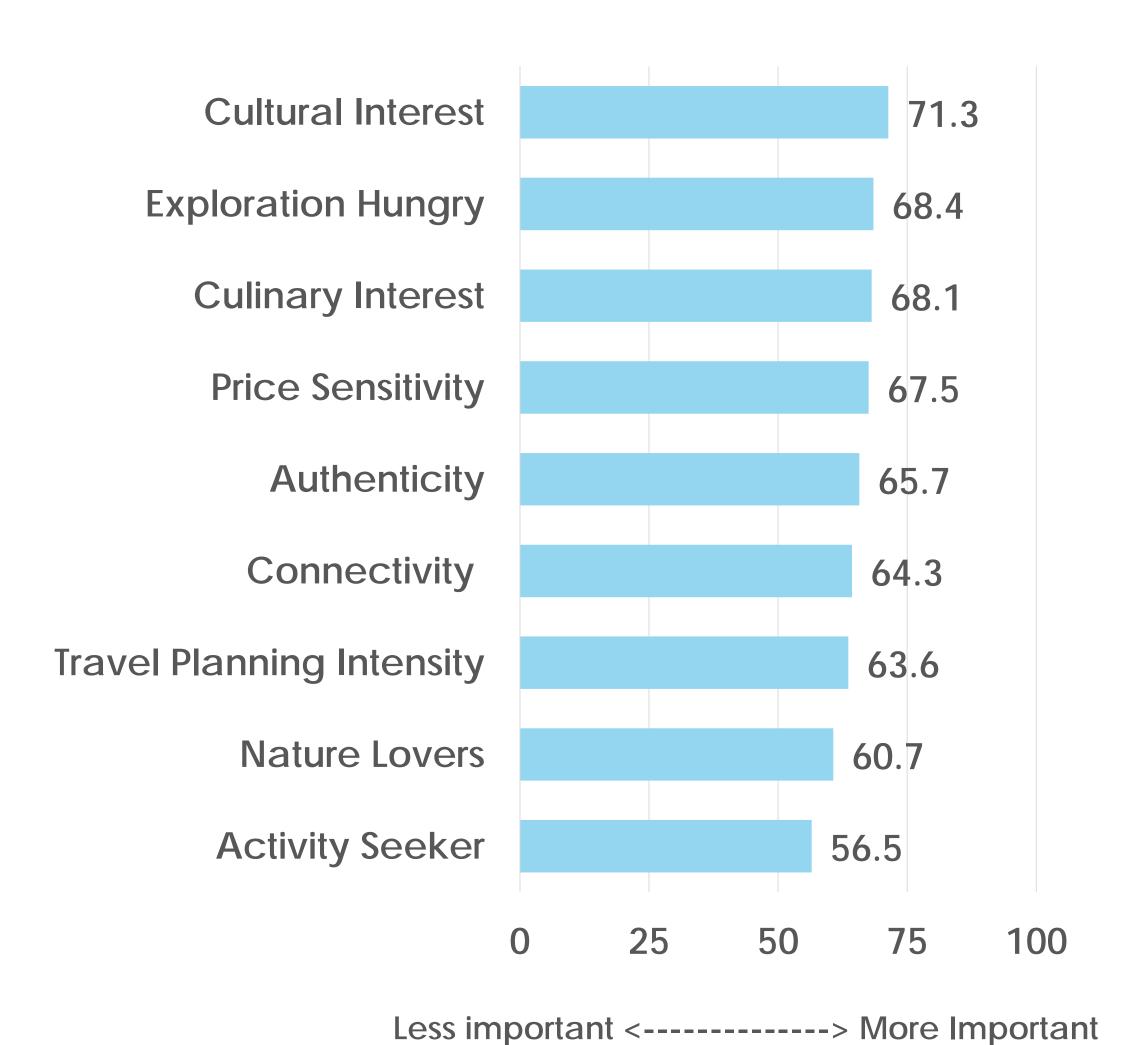
Peer-to-Peer Lodging Mega-Consumers

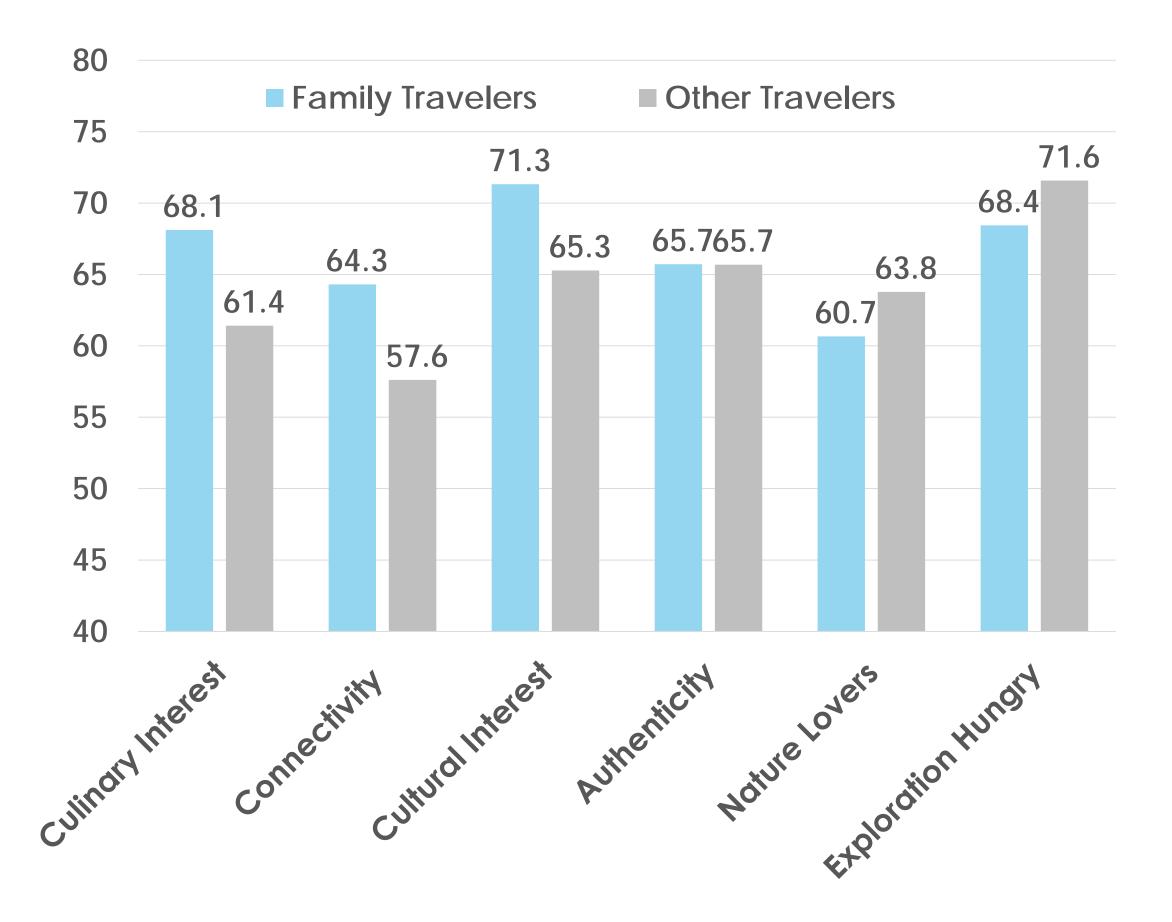
Used in Past 12 Months





Psychographics: Family Travelers

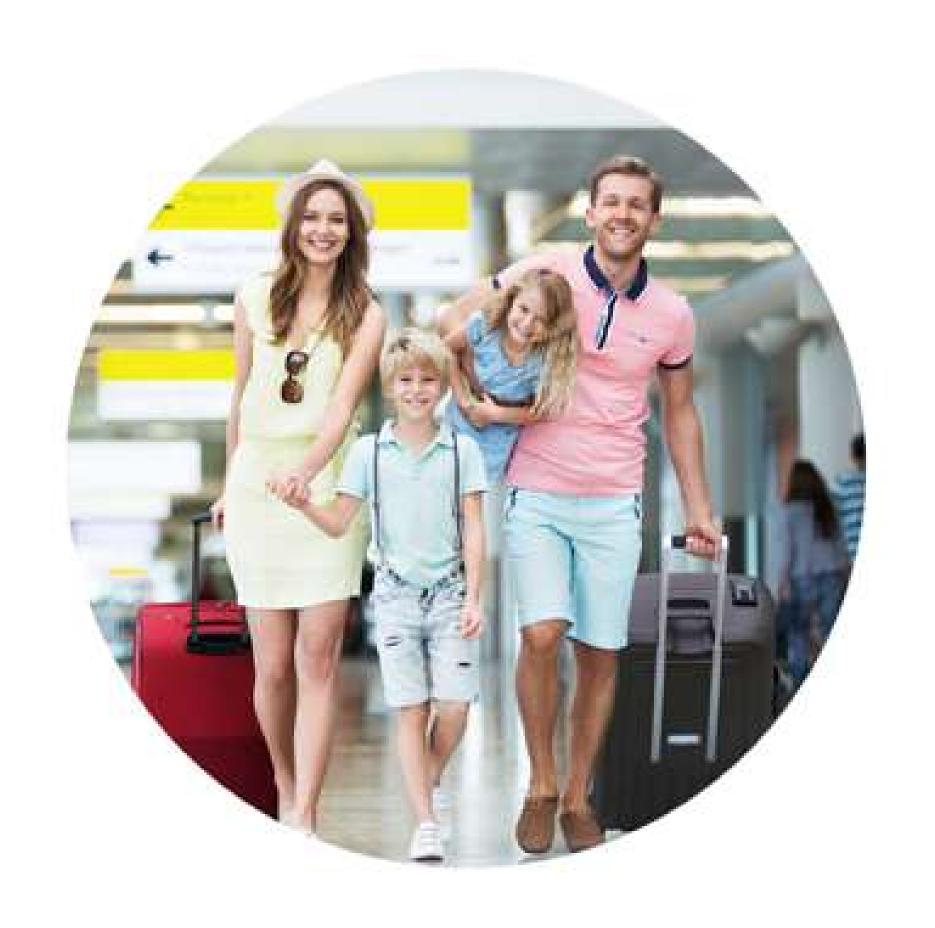






Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months



Takeaways

- 1. Younger
- Heavy social media consumers/users for travel
- 3. Propensity to share photos and do so to influence their networks to travel
- 4. Peer-to-peer Mega-consumers
- Key Psychographics: Cuisine, Connectivity and Culture





Print Resource Users

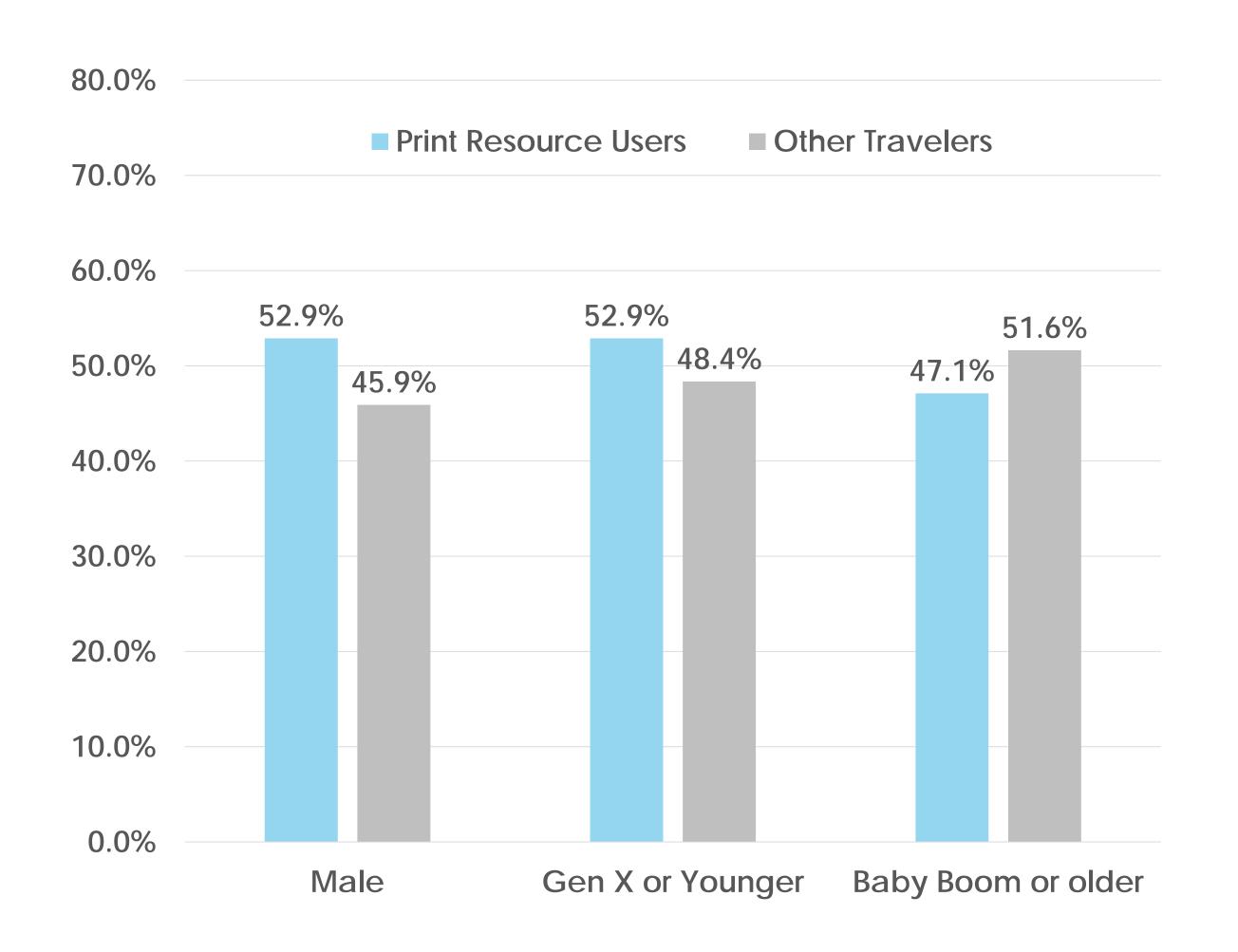
Travelers who have used any printed travel planning resource in the past 12 months

44.8%

of traveling adult Americans



Demographics: Print Resource Users



Print Resource Users

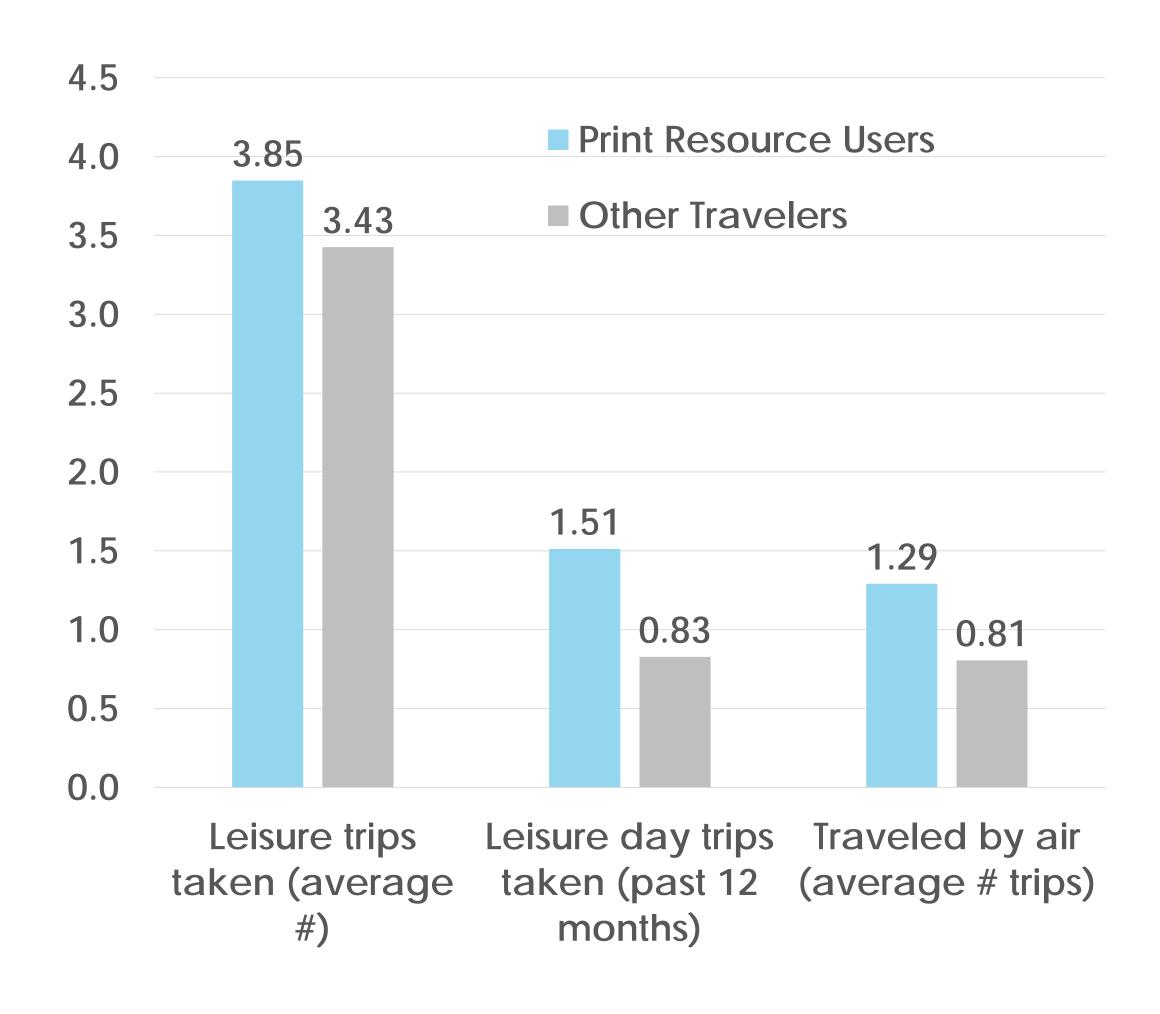
48 Average Age

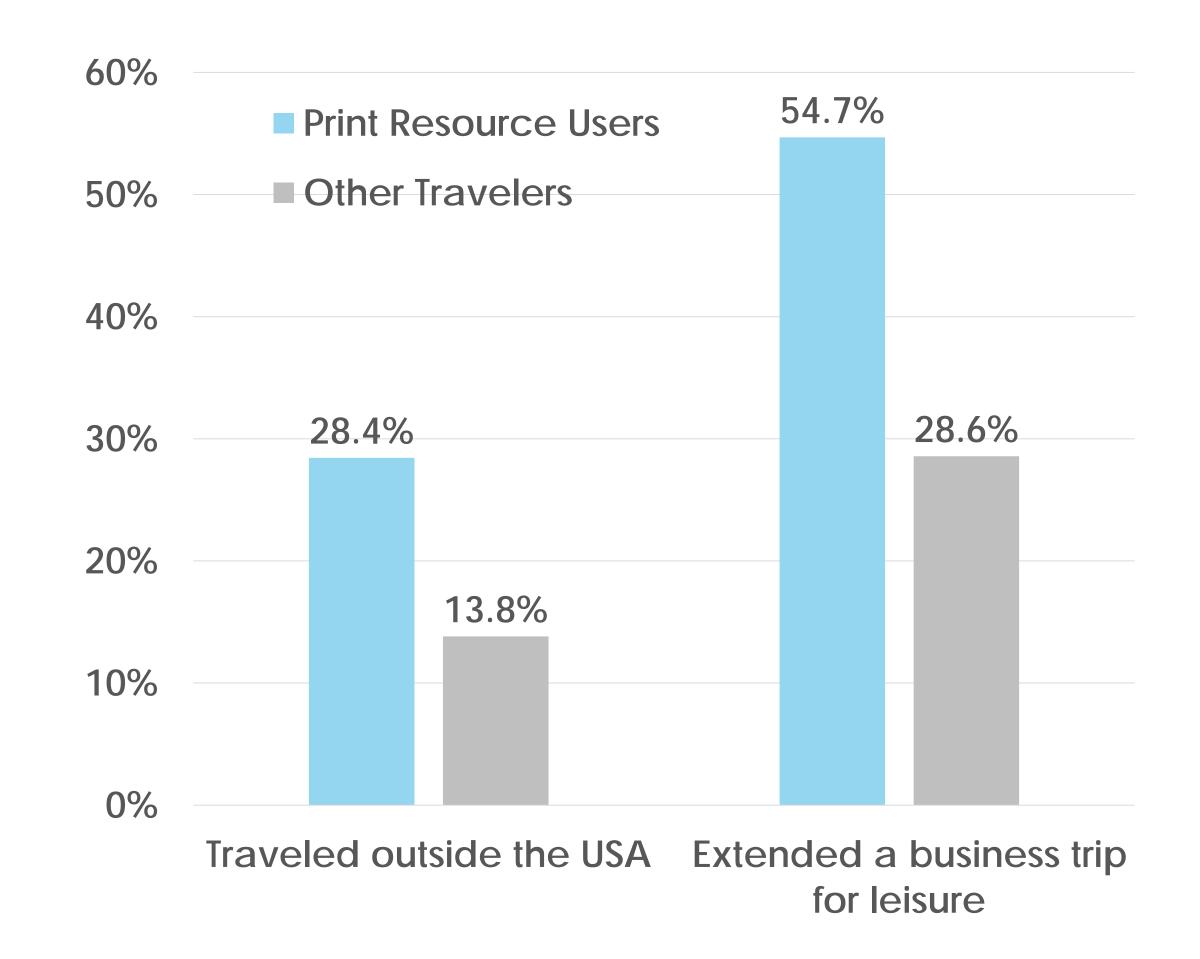
Other Travelers

50 Average Age



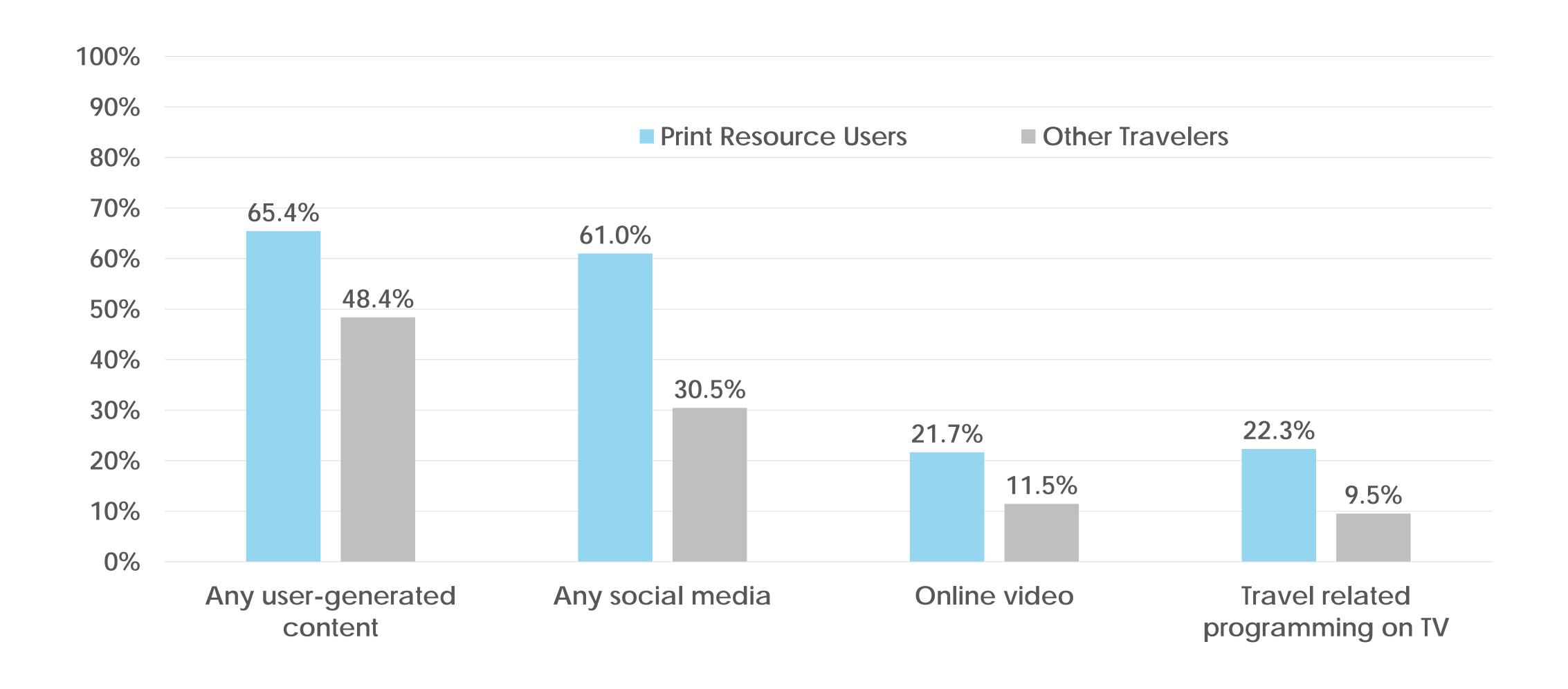
Travel Behaviors: Print Resource Users







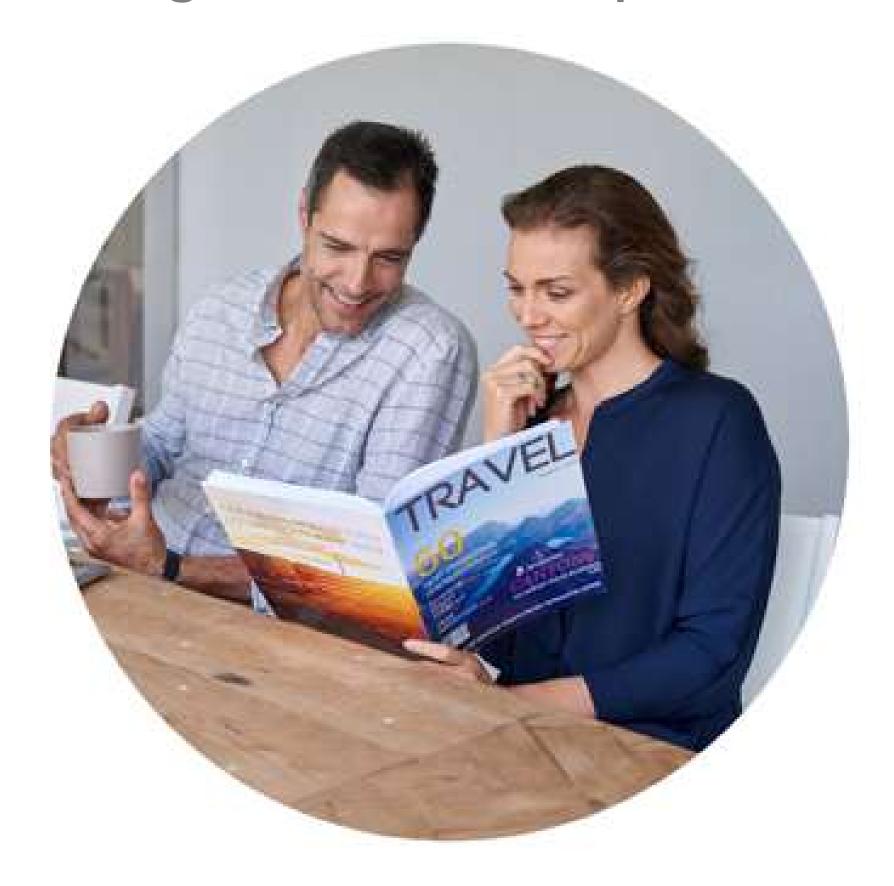
Travel Planning Resources: Print Resource Users





Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months



Takeaways

- 1. The largest segment studied here
- 2. Skews male
- 3. They travel a lot, especially likely to go overseas
- 4. Demographically this segments is more like the norm than the other segments studied
- 5. Also heavy consumers of digital planning content
- Much more likely to use video to plan leisure trips





Social Media-Influenced Travelers

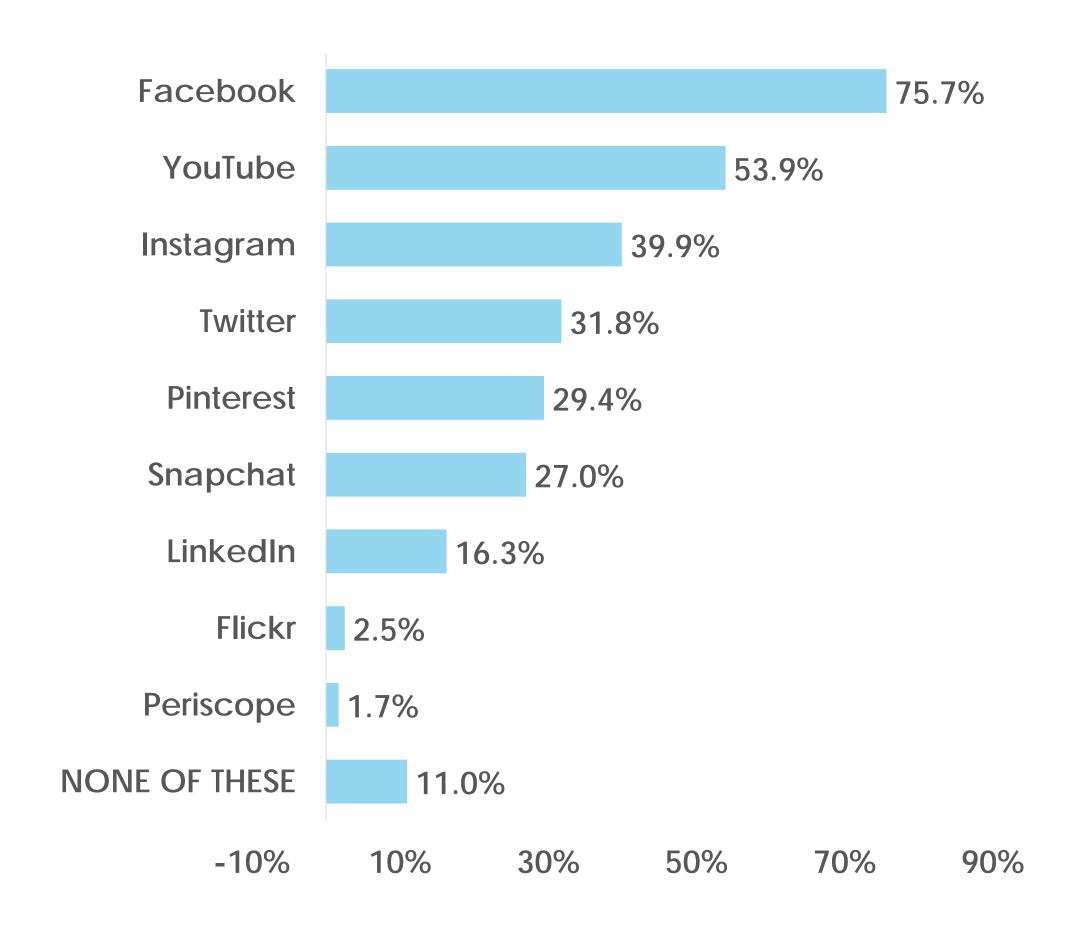
Travelers who visited a place because social media content influenced them to do so

17.496

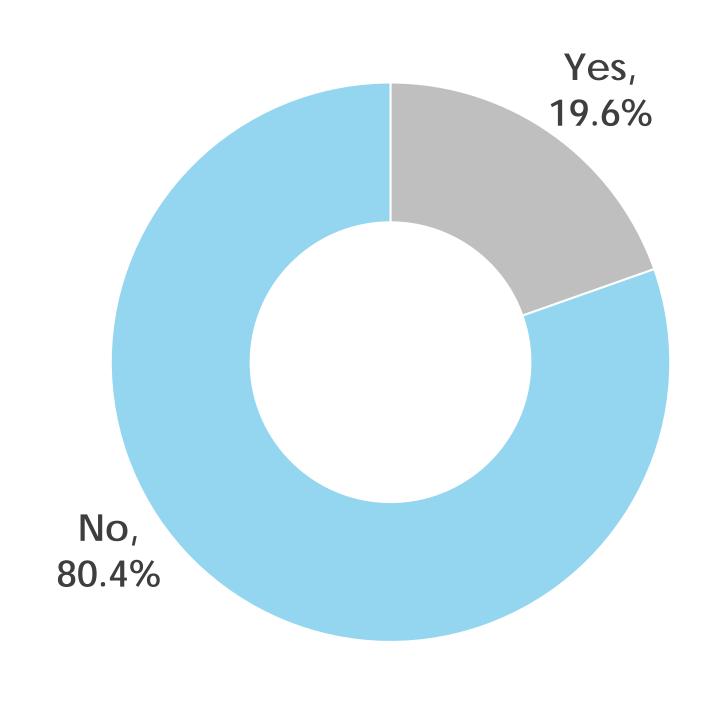
of traveling adult Americans

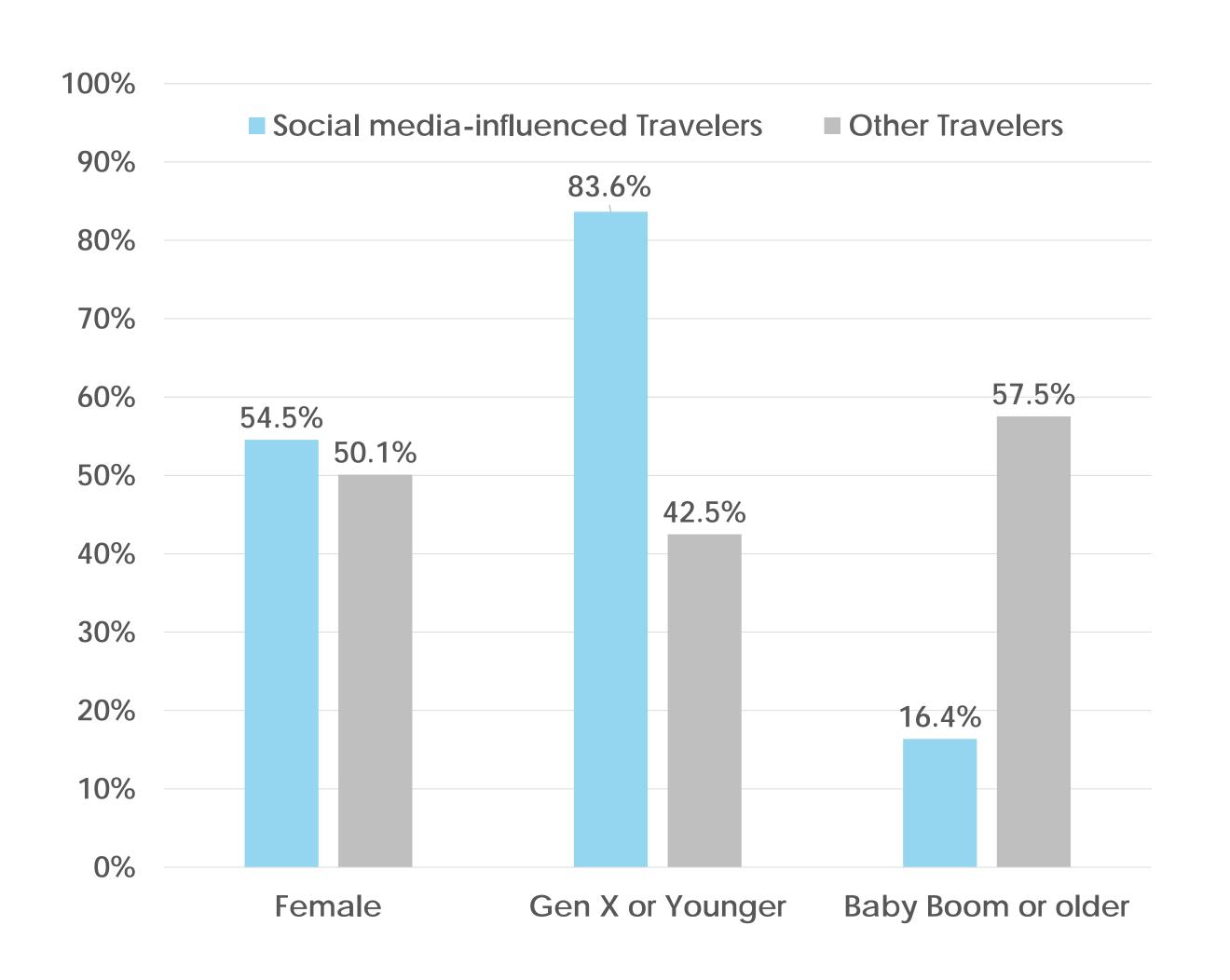


Which of these social media services do you regularly use?



Visited a destination as a result of content seen on any of these social media channels?





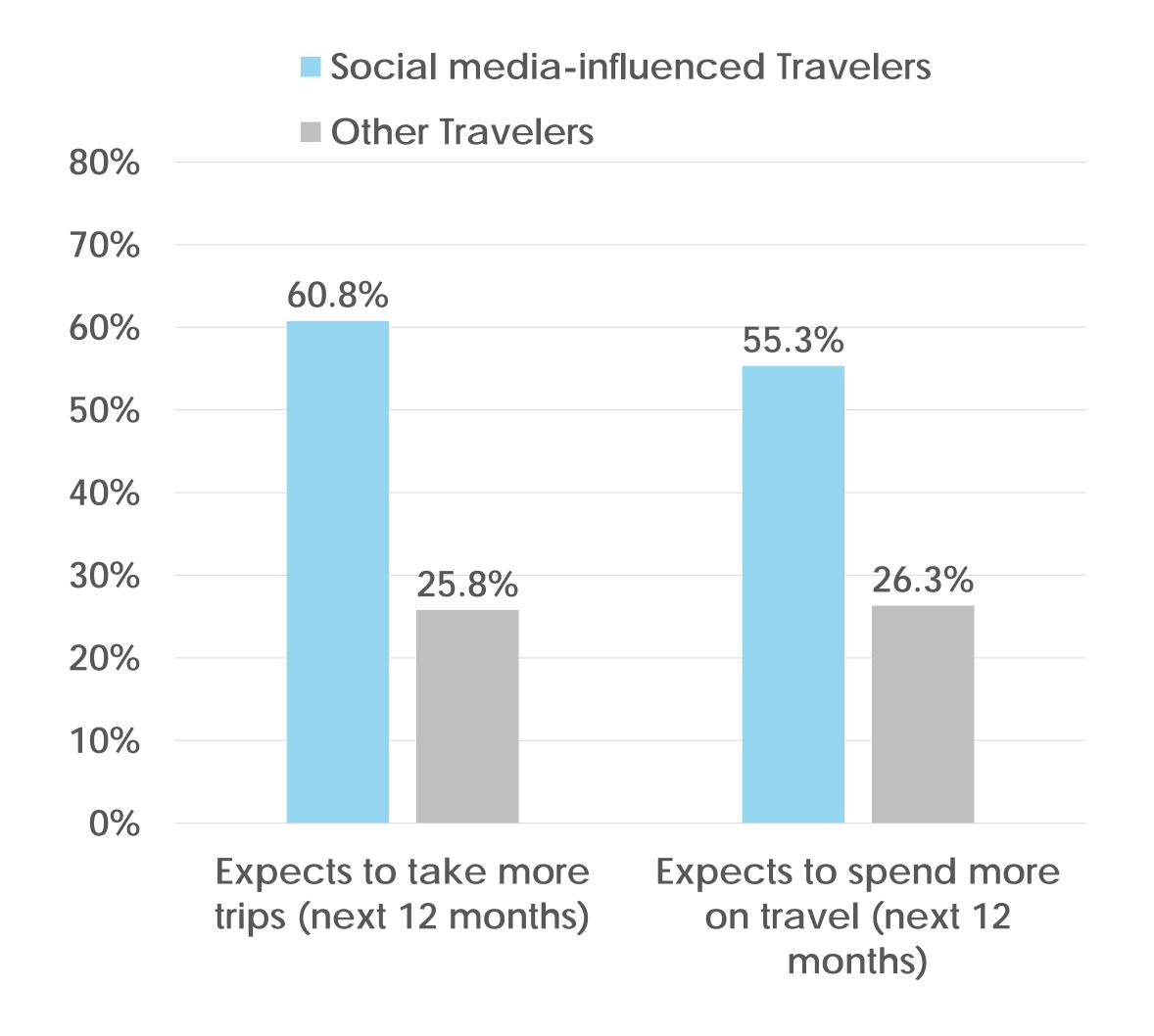
Social Media-Influenced Travelers

35 years old (Avg.)

Other Travelers

54 years old (Avg.)





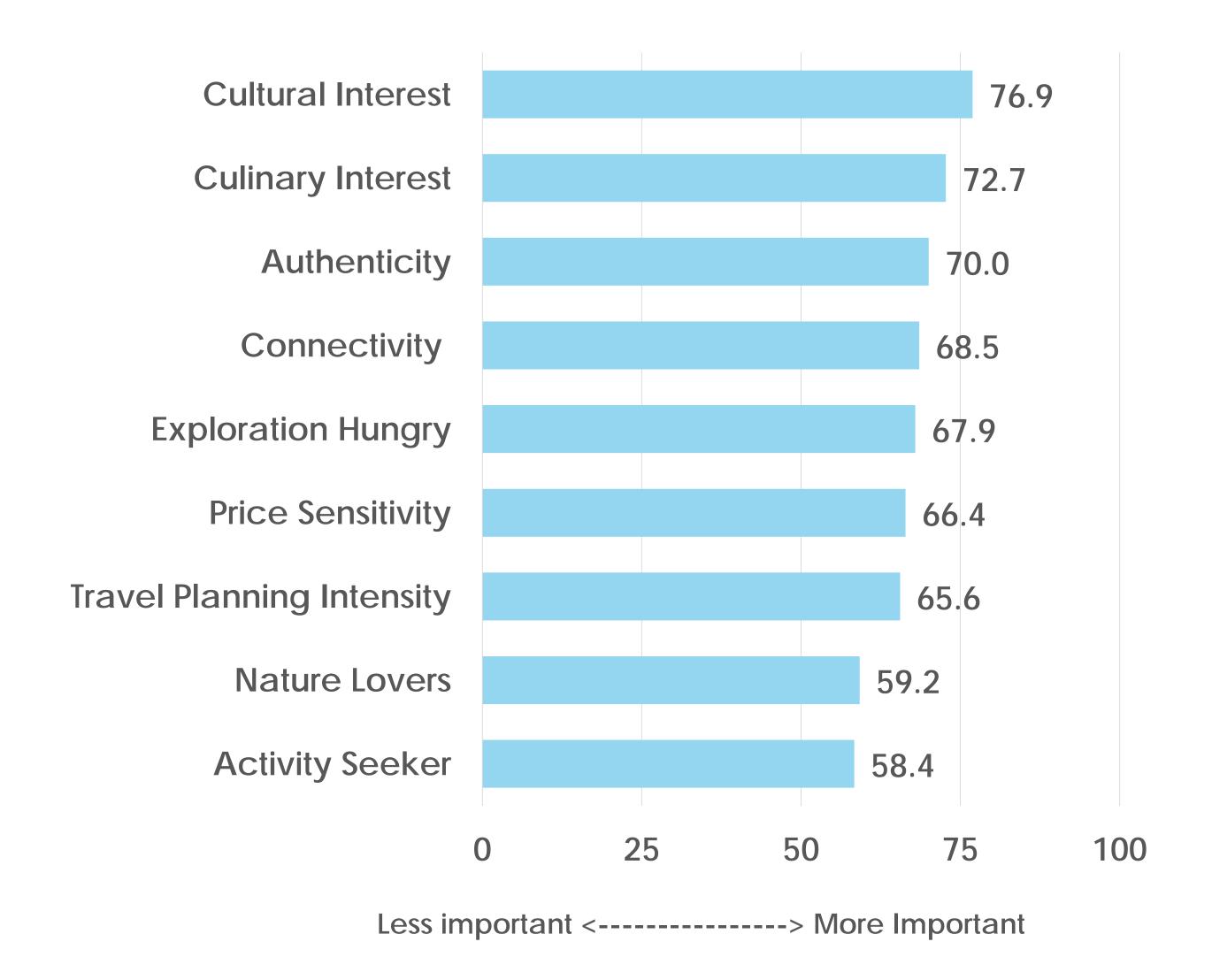
Social Media-Influenced Travelers

\$3,785 Max. annual travel budget

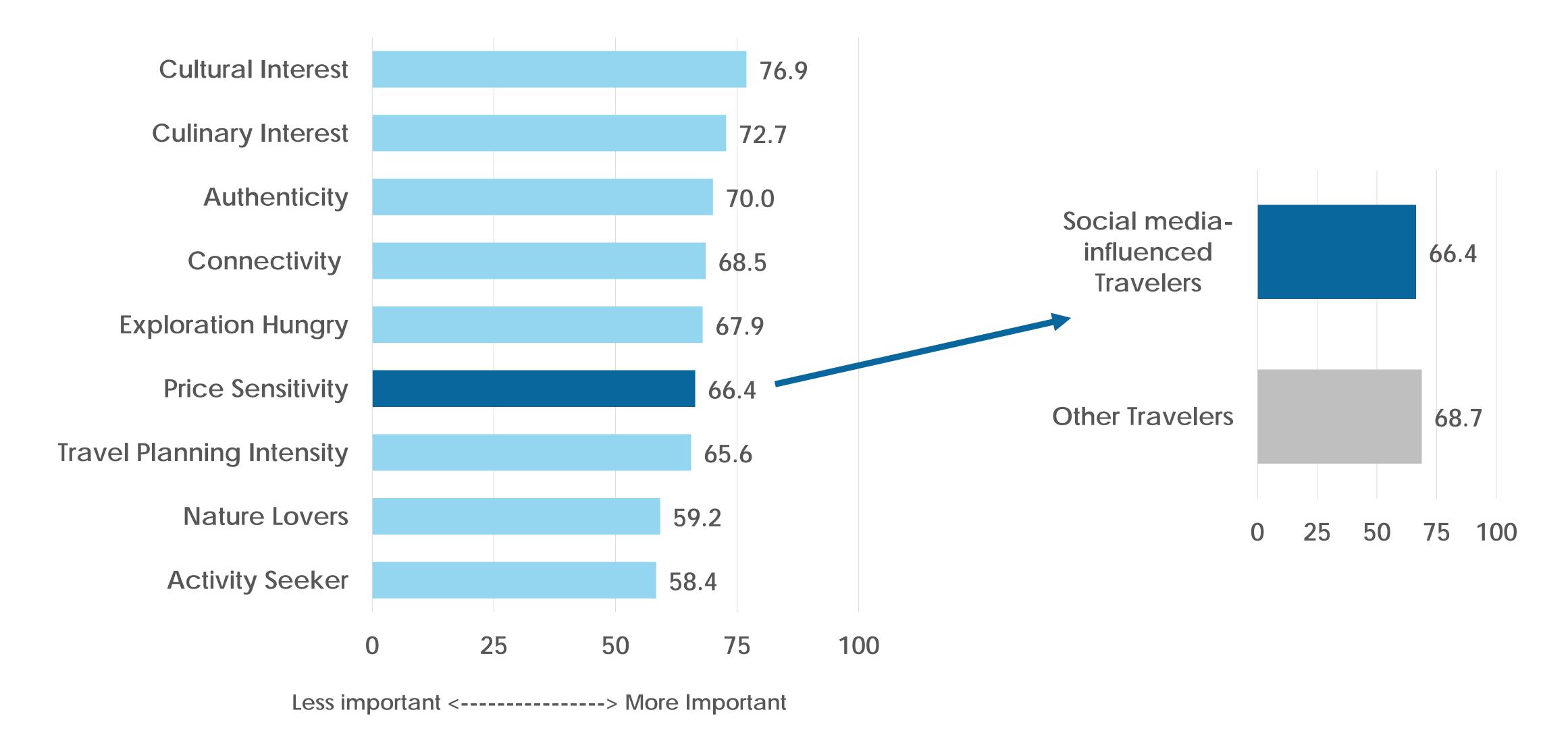
Other Travelers

\$2,975 Max. annual travel budget

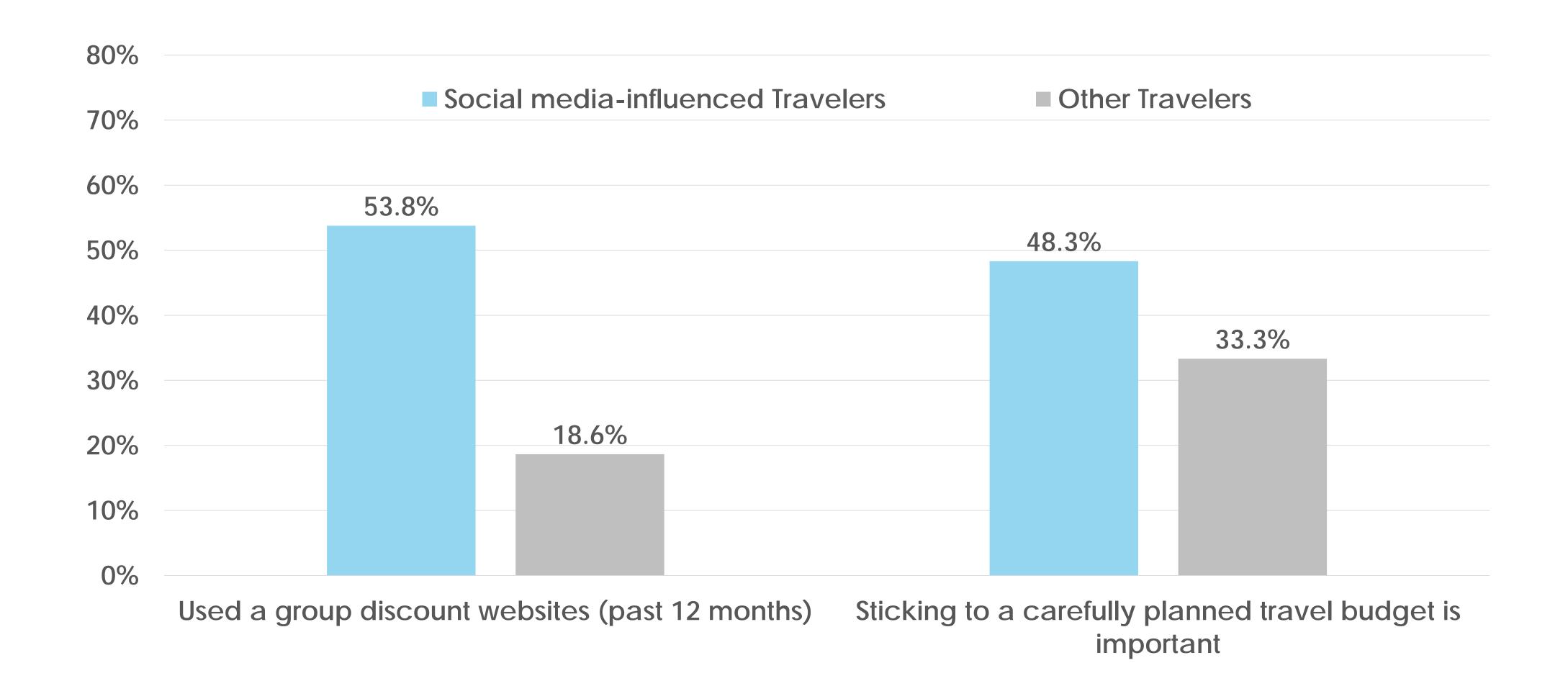














Social Media-Influenced Travelers

Travelers who visited a place because social media content influenced them to do so



Takeaways

- 1. Nearly one-in-five travelers
- 2. Young, with high travel budgets
- 3. Strong enthusiasm for increasing their travel
- 4. Not abnormally price sensitive, but interested in discounts and deals.





BLeisure Travelers

Travelers who have extended a business trip for leisure

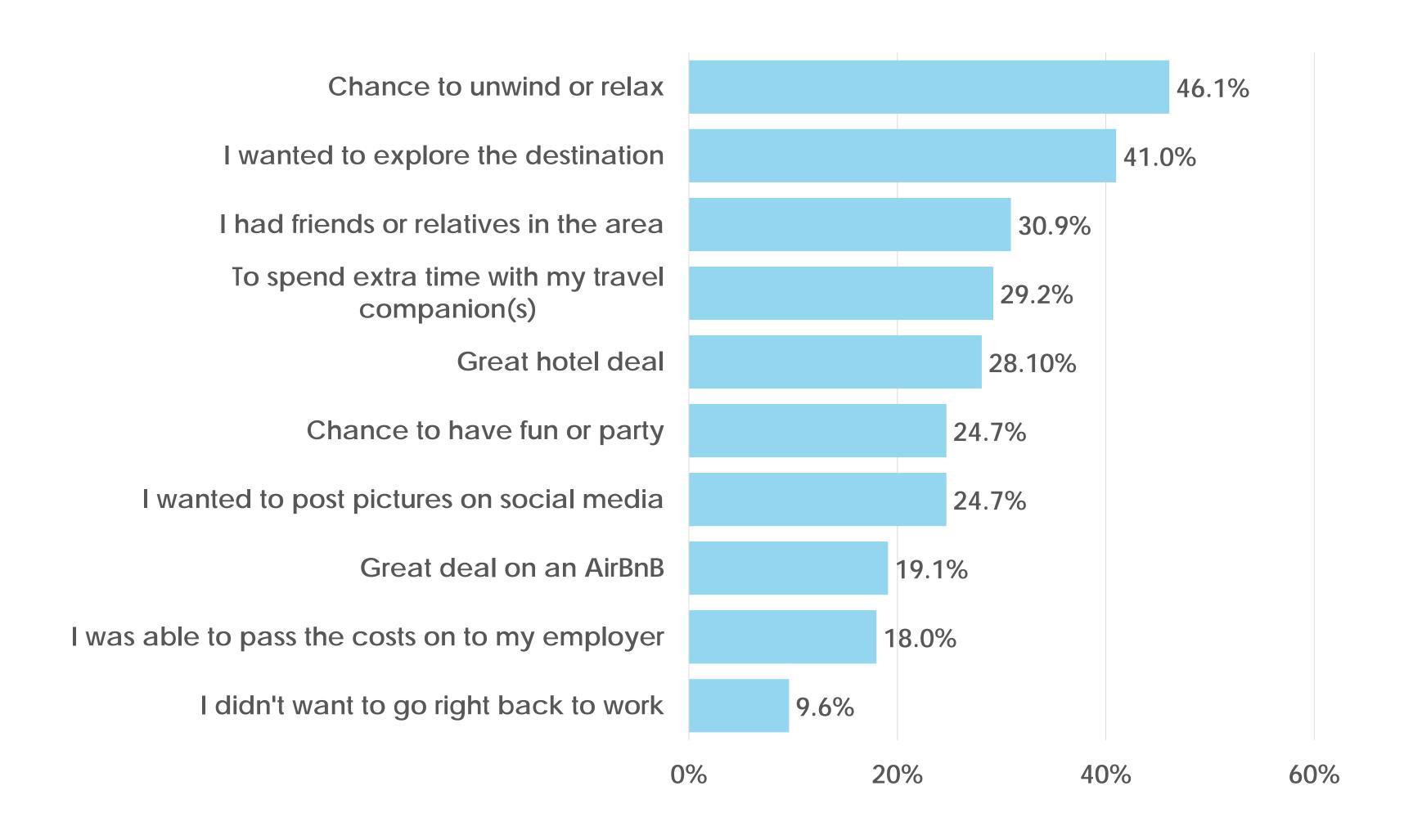
8 9 9 6 of traveling adult Americans

BLeisure Travelers

45.8% of Business Travelers have extended a business trip for leisure in the past year



Why They Combine Business with Leisure

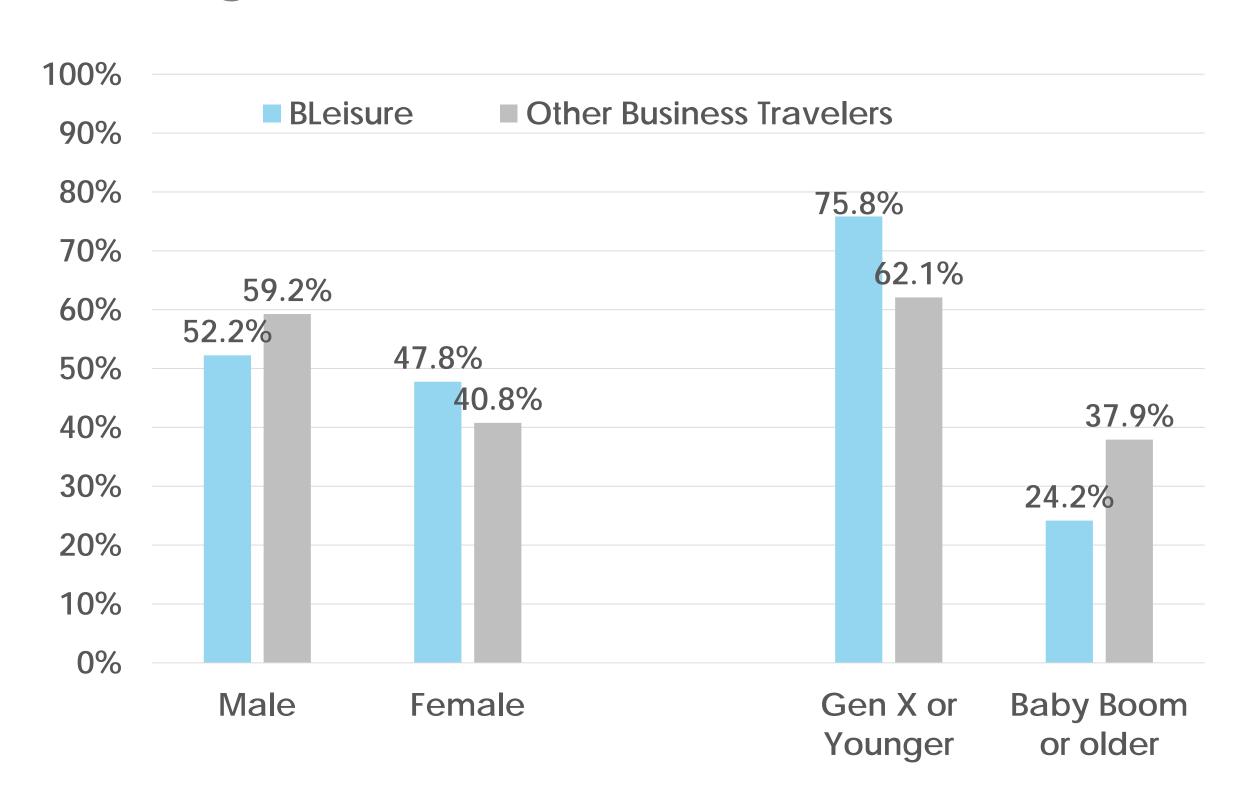


Question: Why specifically did you extend your business trip(s)?



Demographics: Business-Leisure Travelers

Younger and less of a male skew



BLeisure Travelers

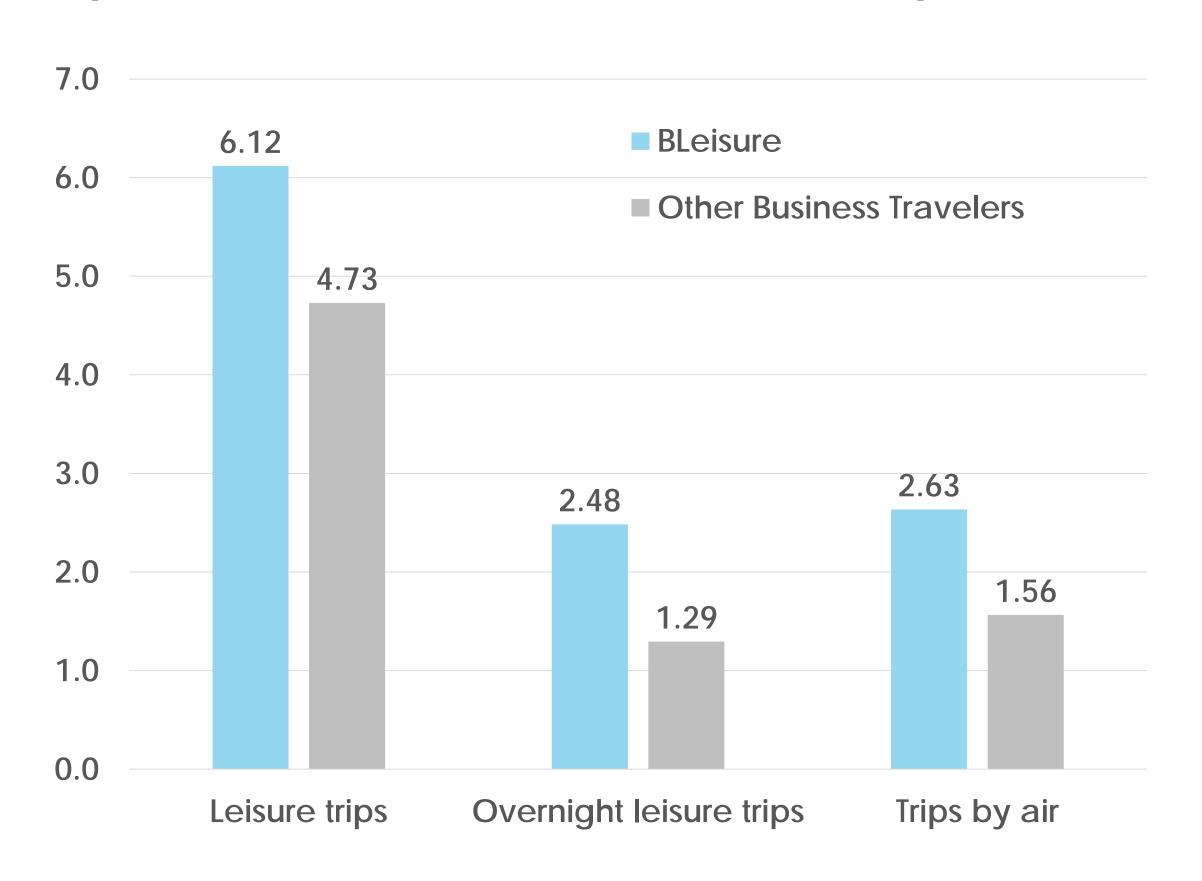
41 Average Age

Other Business Travelers

45 Average Age

Travel Behaviors: Business-leisure Travelers

Frequent Travelers - International Super Travelers



Traveled Outside the USA

Family Travelers

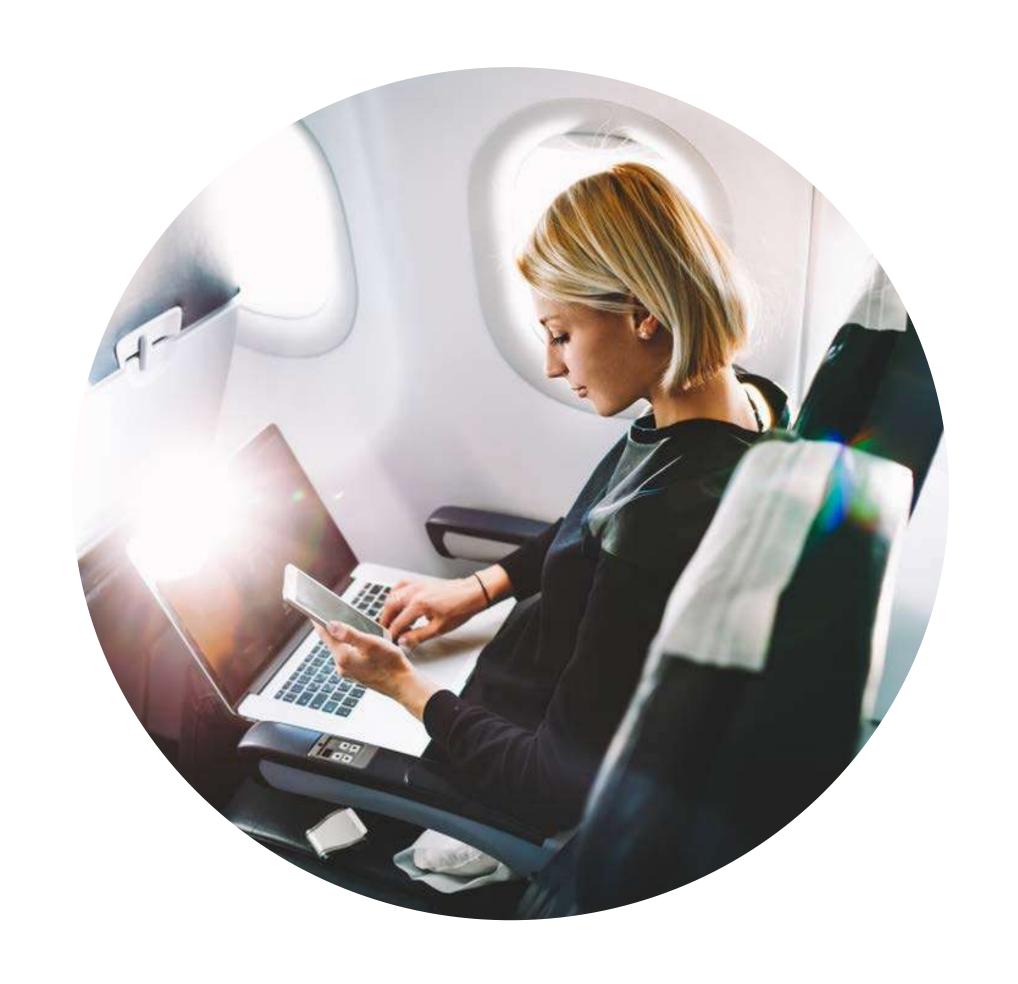
60.1%

Other Travelers

26.1%



Used Social Media for Travel Planning (Past 12 Months)



BLeisure Travelers

79.8%

Other Business Travelers

55.0%



Question: When traveling for leisure, do you take photos/videos to share on social media? (ALWAYS)

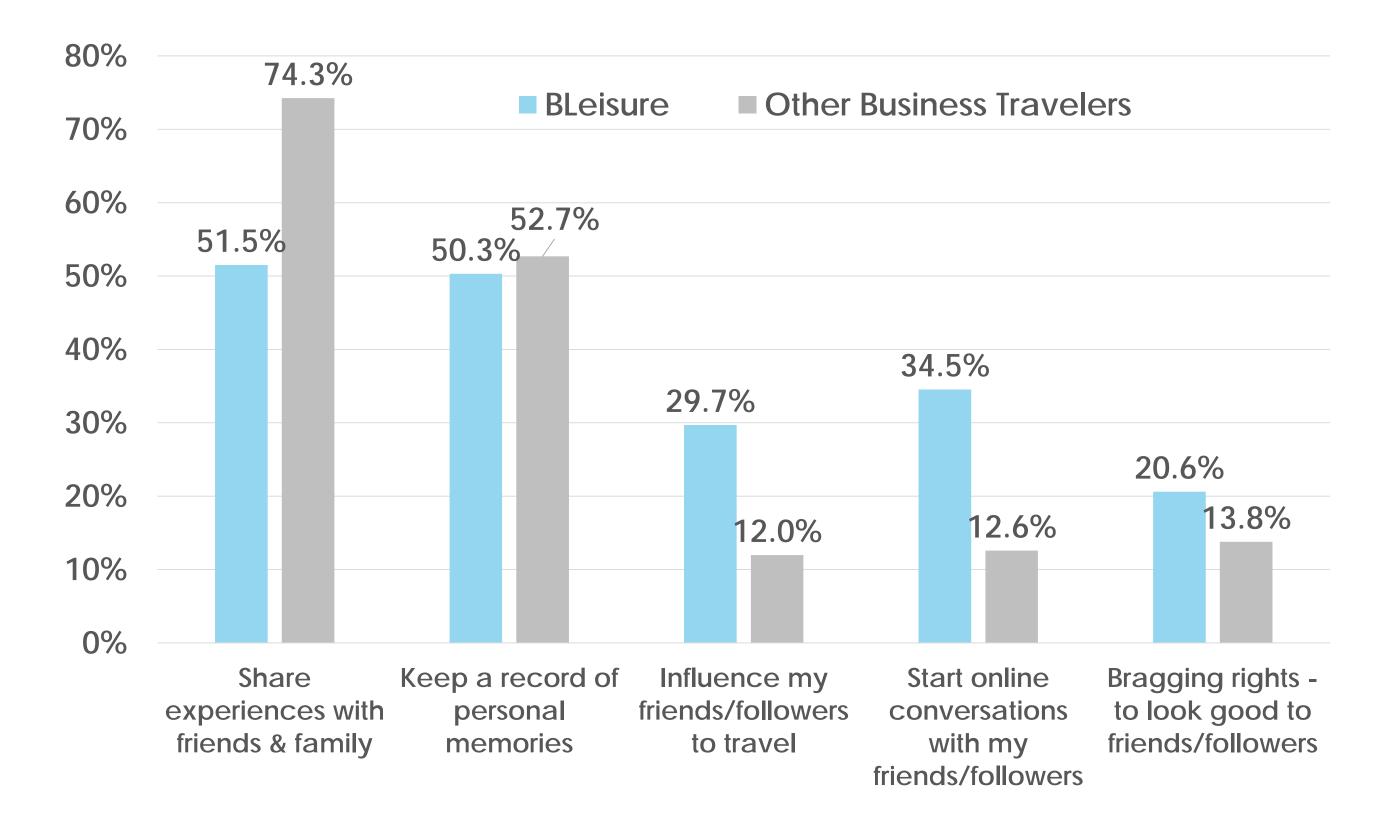
BLeisure Travelers

54.5%

Other Business Travelers

36.5%

Main Motivations for Posting Images on Social Media





Destination Analysts Do Your RESEARCH



















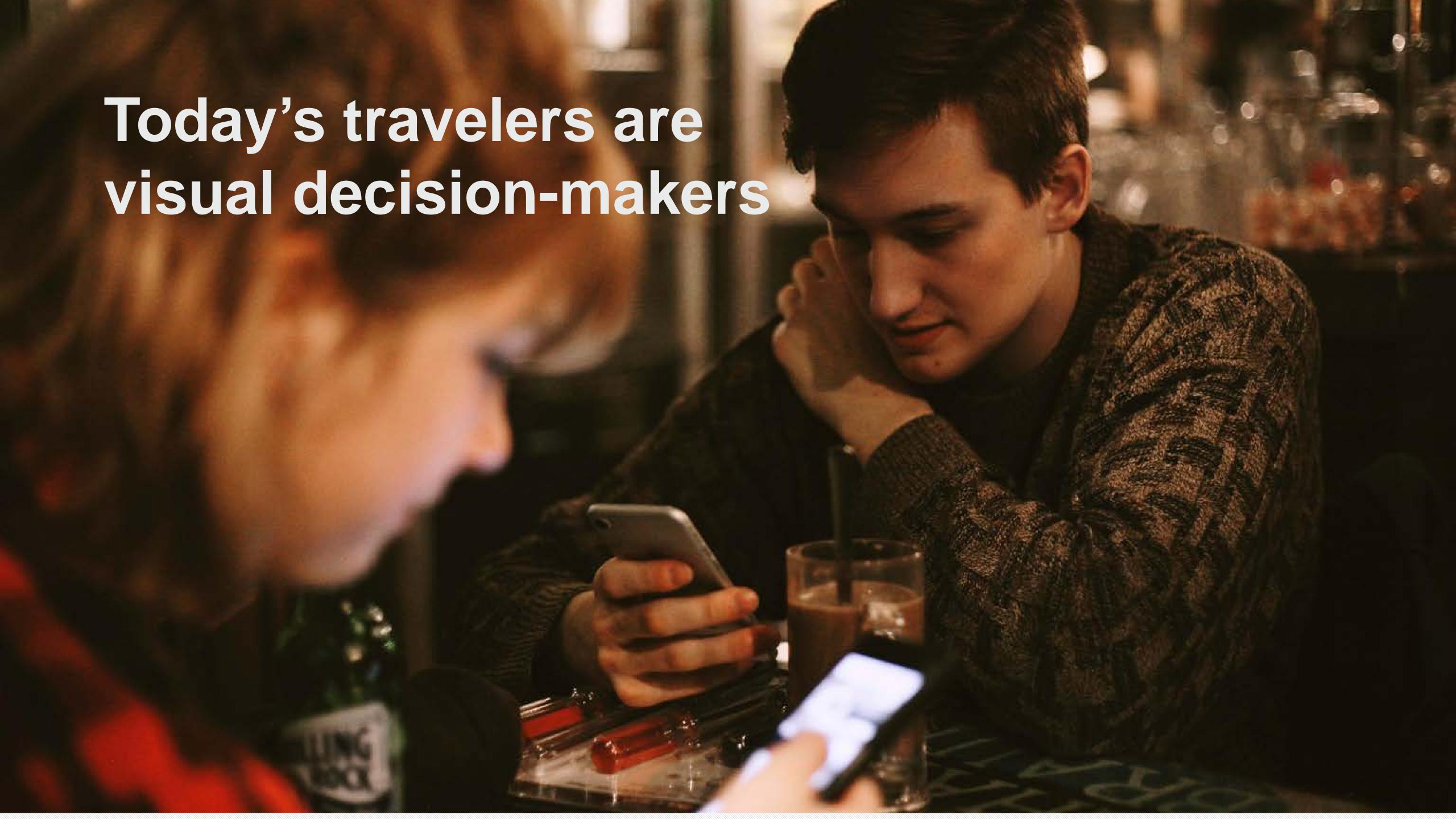














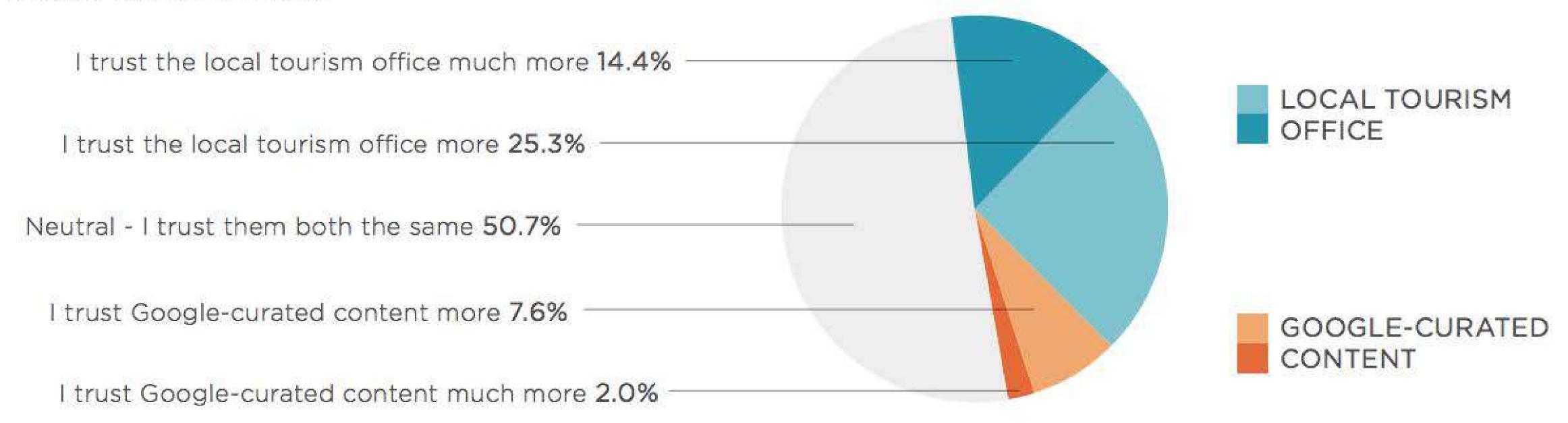


#1

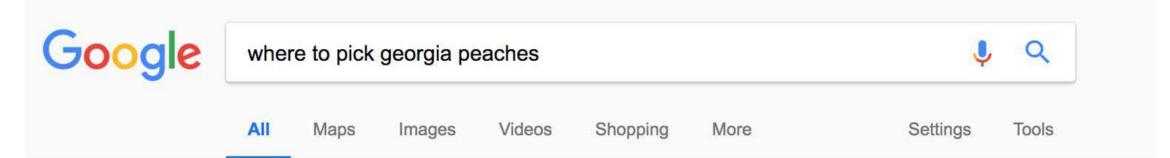
Differentiate your DMO's visuals from what people can find using Google



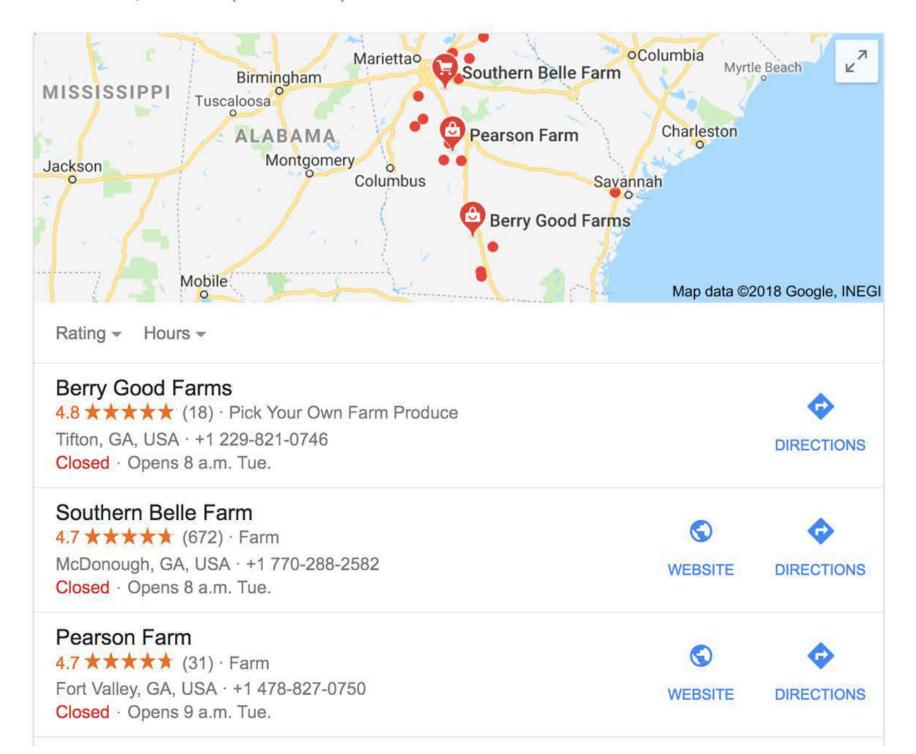
Q: Which content, opinions and advice would you generally trust more? A local visitor bureau/tourism office or Google-curated content?



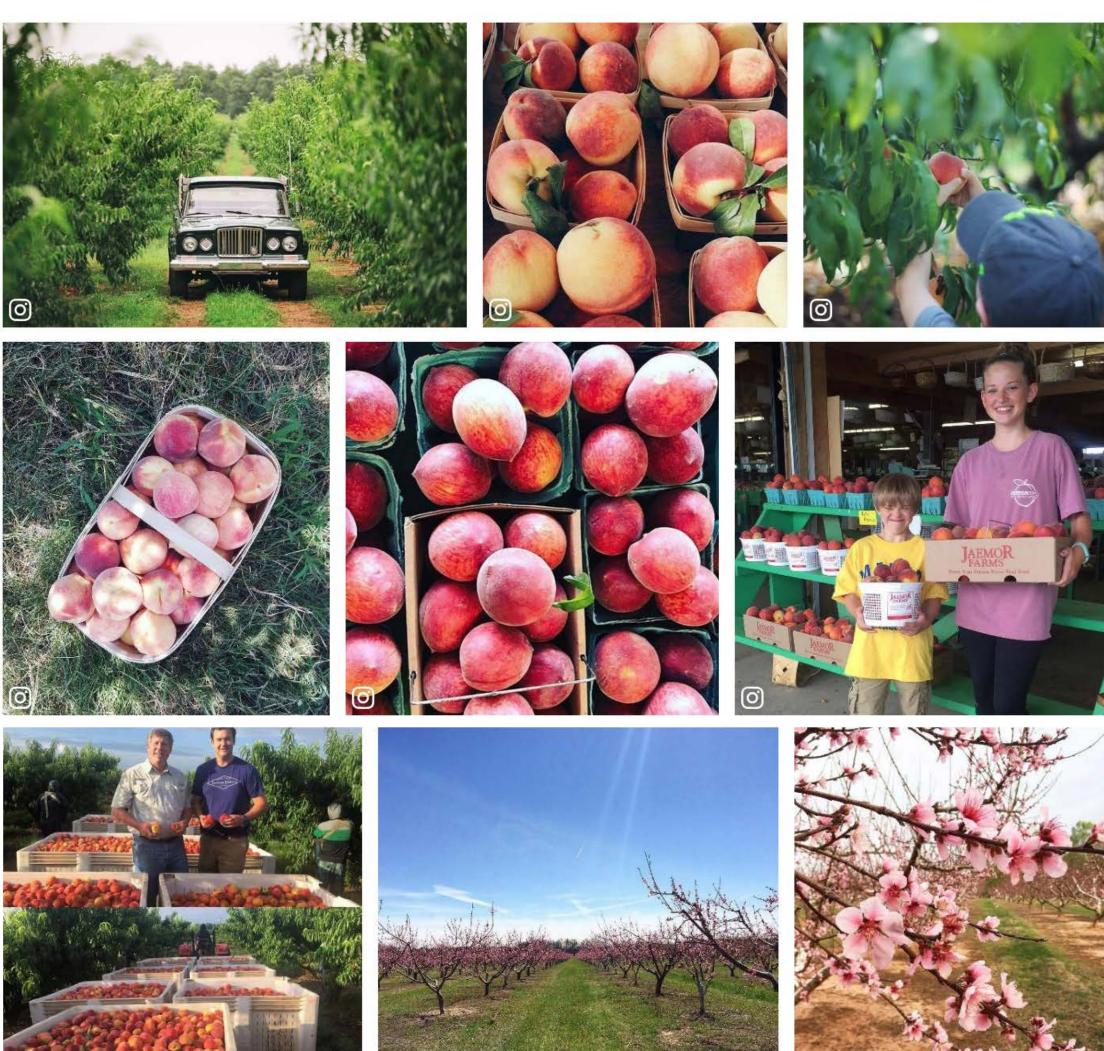
Source: Destination Analysts, State of the American Traveler, April 2018



About 338,000 results (0.71 seconds)



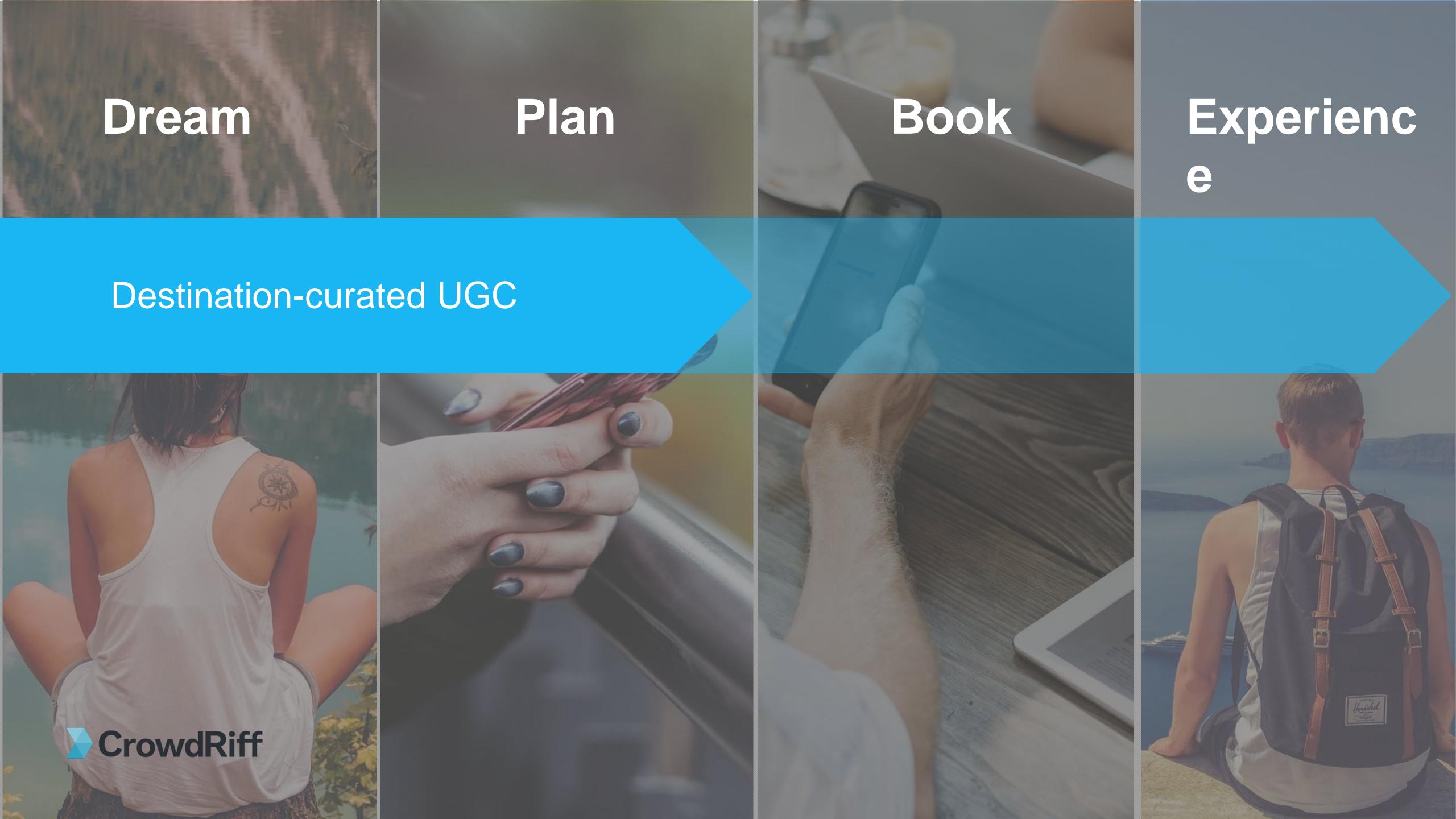




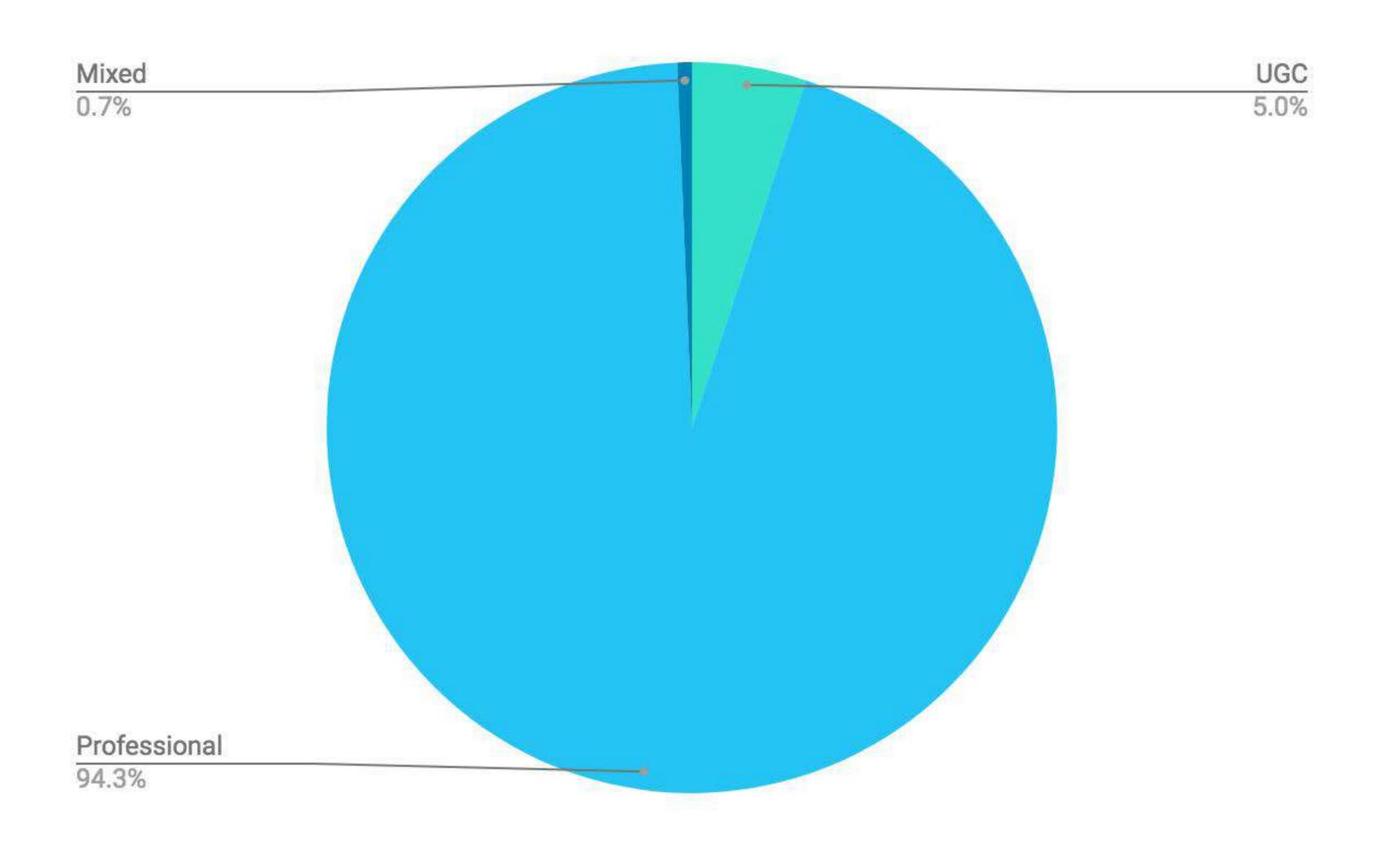
#2

Replace some of your stock photography with UGC.





Type of visuals in State DMO Facebook ads



Visitor guides

SO YOU'RE HERE TO...

Whatever brings you to Milwaukee, there's family fun waiting.







Get the whole

With more than 3,000 creatures

Guarantee a peaceful ceremony by taking the kids to get their energy out during the day. Explore the outdoors at **Schlitz** Audubon Nature Center (1111 E Brown Deer Rd.) or one of three branches **Ecology Center**

(urbanecologycenter. argl, Turn them loose Parks' (county: milwoukee.gov/ wordsnipeds, and ice rinks for a hearty dose of fresh air year round.

30 | MILWAUKEE VISITORS GUIDE 2018





products, people history, and culture American company

try on a pint-sized

their size in the

Kids can still experience a classic Milwaukee brewery

tour at **Sprecher Browery** (701 W. Glendale Ave.)

while parents enjoy a



(2220 N. Commerce St.), your kids can literally climb the walls - any active kid will be captivated by the 150+ possible routes on the walls at this indoor rock climbing gym. Or hit the ice at the **Pettit**

training site for century! Old World can skate on one Eagle) is one of the Olympic Ovals in the history museums

than 60 original over the state Join is extended clan out crafts, farm chores, games, and more interactive fun as and about with a trip re-enactors show you what life was like County Zoo (10001

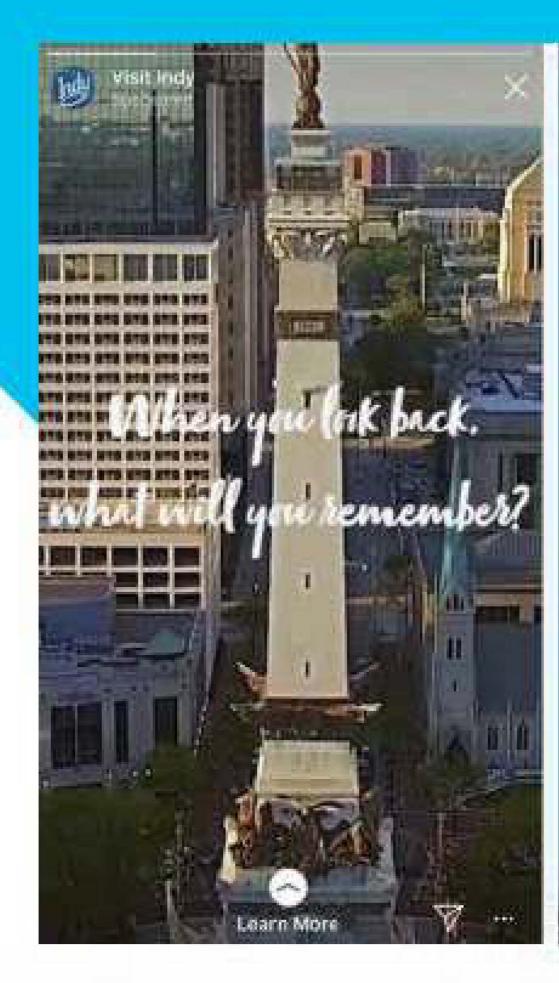


Ads



Blog posts









THINGS EVERY FANATIC SHOULD DO IN INDY

You go where your team goes. You judge a city by its arena food. Your house weers your team's colors, and your firstborn was named after a famous athlete. You know that Bracketology is a true science (and you claim to have a doctorate).

You live for the buzzer beaters, the last-second lield goals, the walk-off grand slams. You're a supporter, loyal to the last out and the final whistle – not a sports fan, you're a sports fanalic.

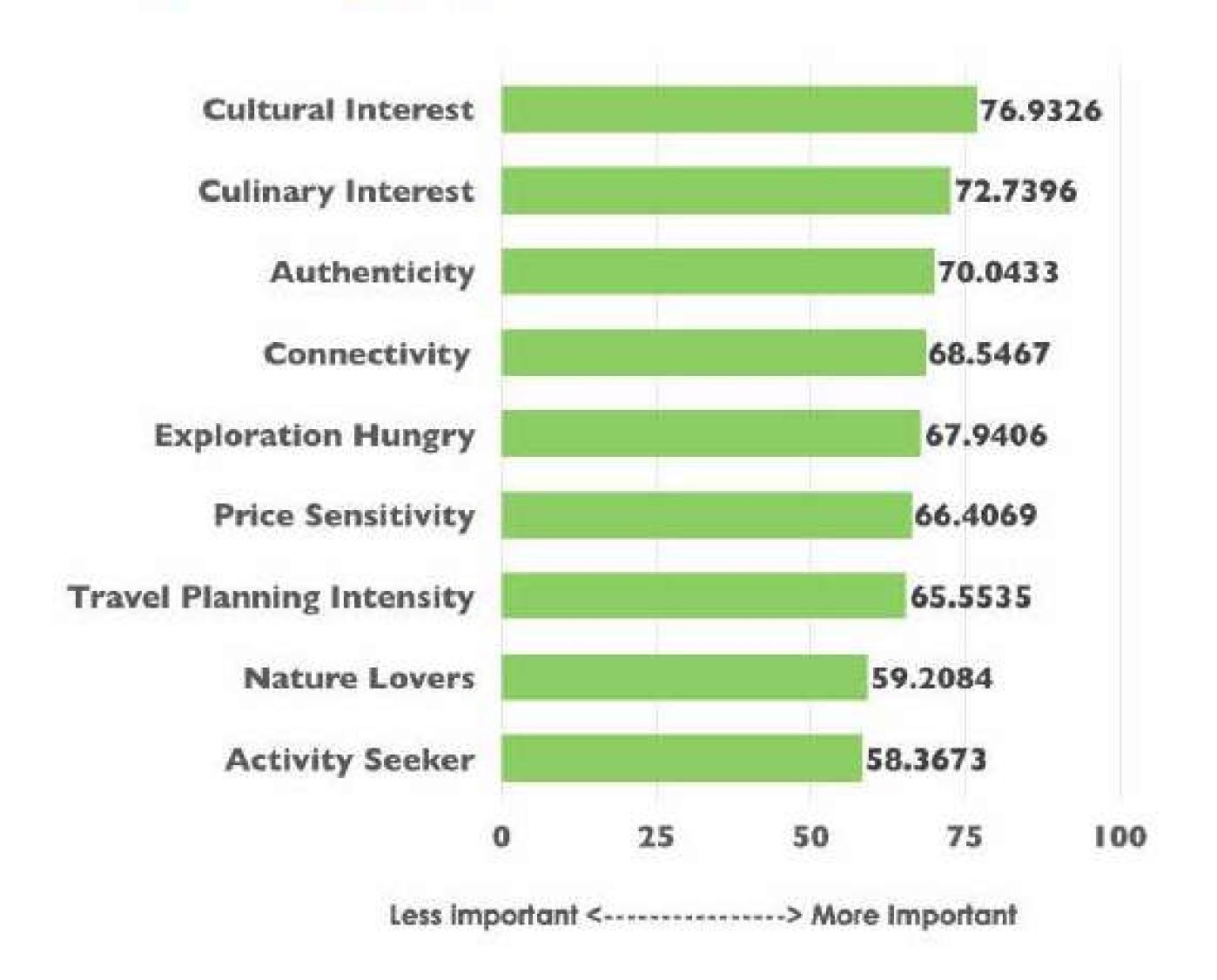
3X increase in CTR with UGC

#3

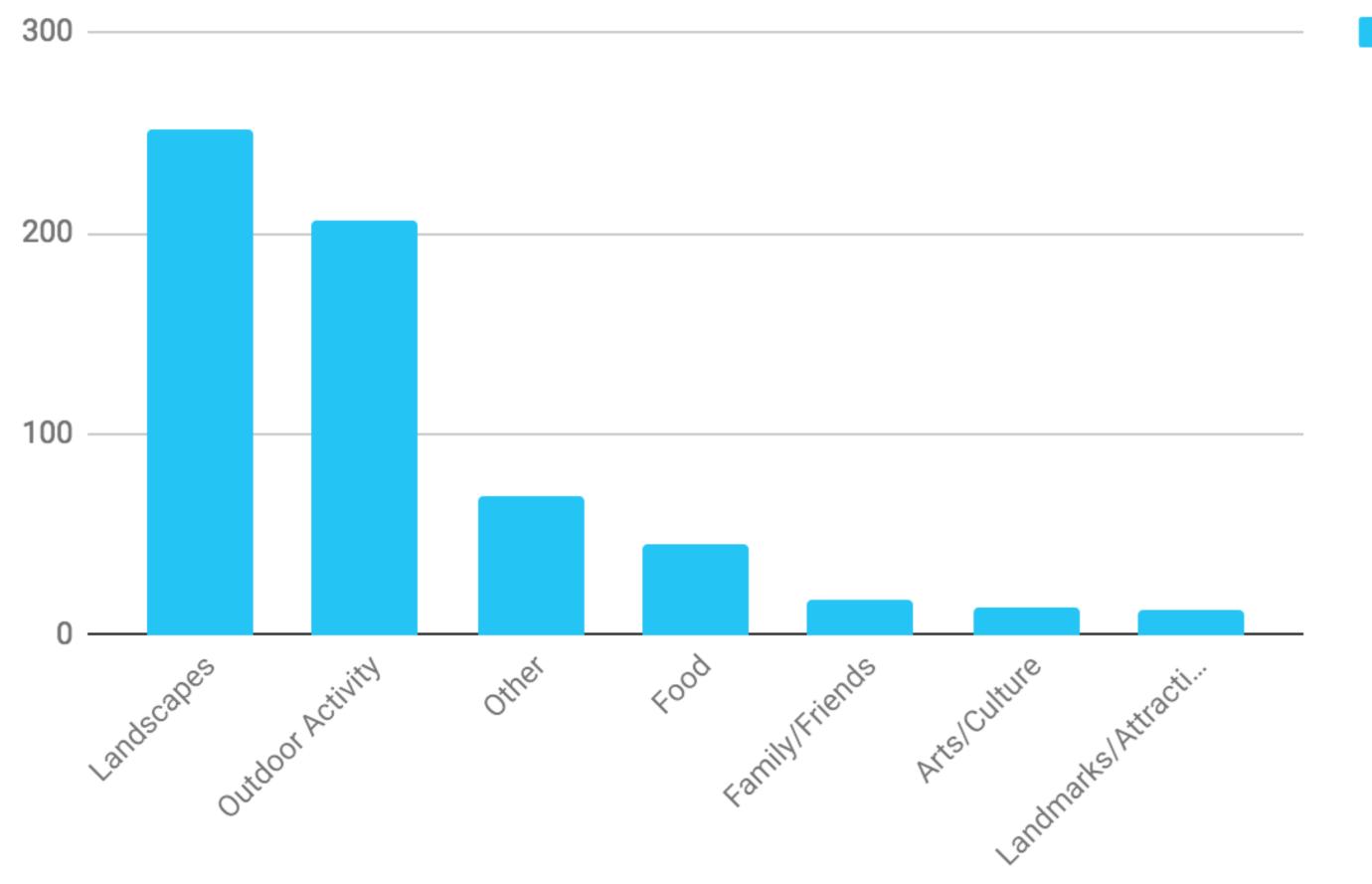
Use your visuals to reflect your different traveler personas



Psychographics: Social Media-influenced Travelers



Most popular visual themes in State DMO Facebook ads





Shop I Specials I Visitor Guide I Weddings I Groups 📵 f 💟 🛭 🙉 🔅 80° 🕒 Webcams 🔎 Search



DISCOVER

THINGS TO DO

EVENTS

STAY

DINE

PLAN

Why Parents Love 'Em: The Golden Isles boasts beach weather year-round. Not to mention the relaxing sounds of the sea and their happy children. Top it all off with tired-out children by the end of the day, and it's no wonder parents visiting the Golden Isles never forget to pack the sunscreen and beach towels!











4. EXPLORING ON TWO WHEELS

Why Kids Love It: There are more than 50 miles of bike paths between Jekyll Island and St. Simons Island - our two most family-friendly isles. With so much space for kids to lead their own adventures and exploration, they love riding around our islands!





FOOD

EVENTS

EXPL siti PLACI

MEETINGS | TRAVEL TRADE | SEARCH Q

PLAN your trip

FRIENDS TRUST FRIENDS. NOT ADS.

0

See what real people have experienced during their time in #ThePalm Beaches.

Delicious dining, live music, artsy avenues – it's all here, waiting for you to explore. Follow the footsteps of someone you see below, or forge your own path. We promise – once you're here, you'll want to tell everyone about it, too.





















51%

Increase in Display Ad Acquisitions 23%

Increase in Overnight Visits

35%

Increase in Web Conversions



Trend #1

Finding the needle in the (visual) haystack.











#southdakota

1,013,804 posts

> 1 million posts

Top Posts



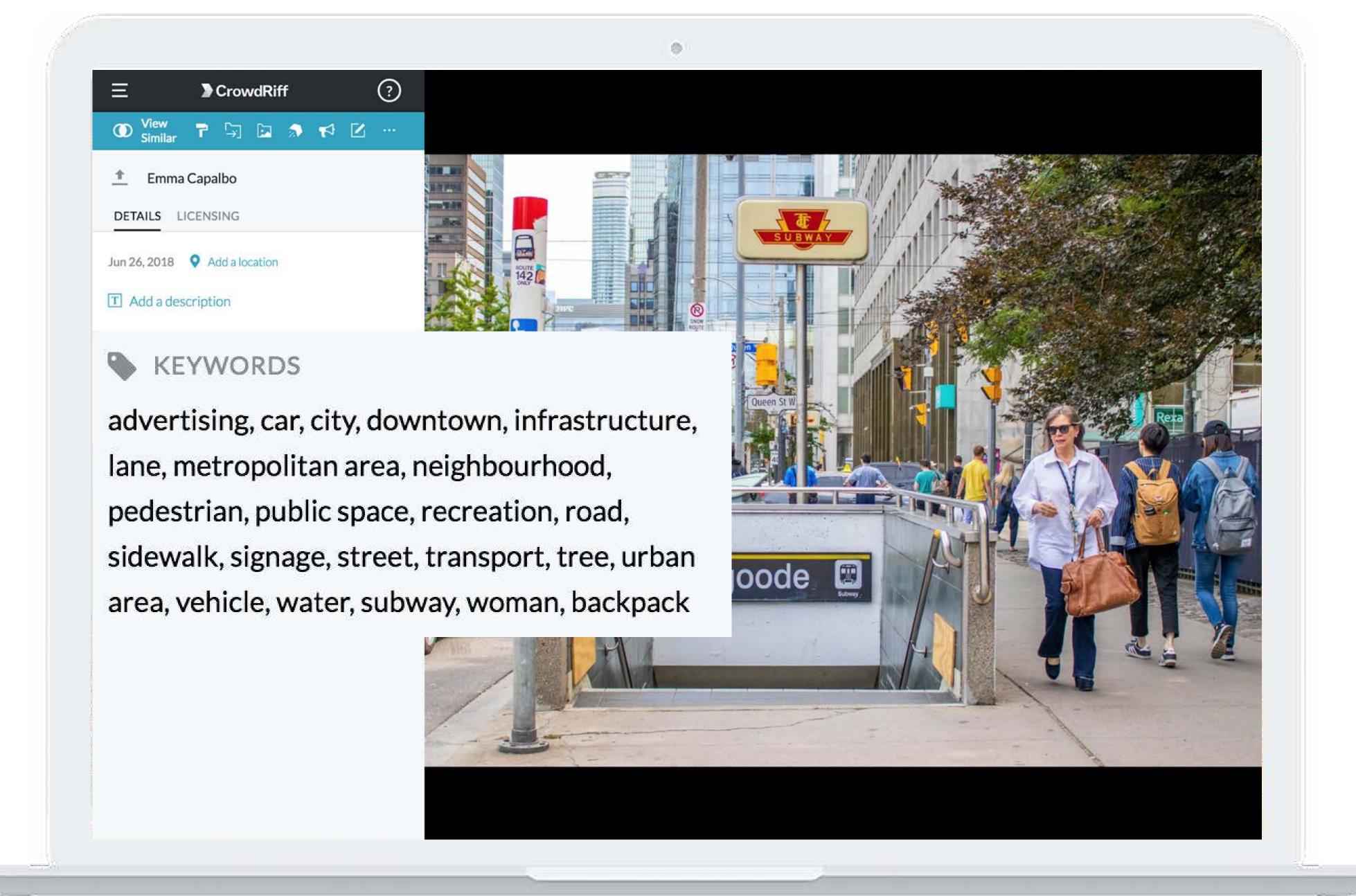


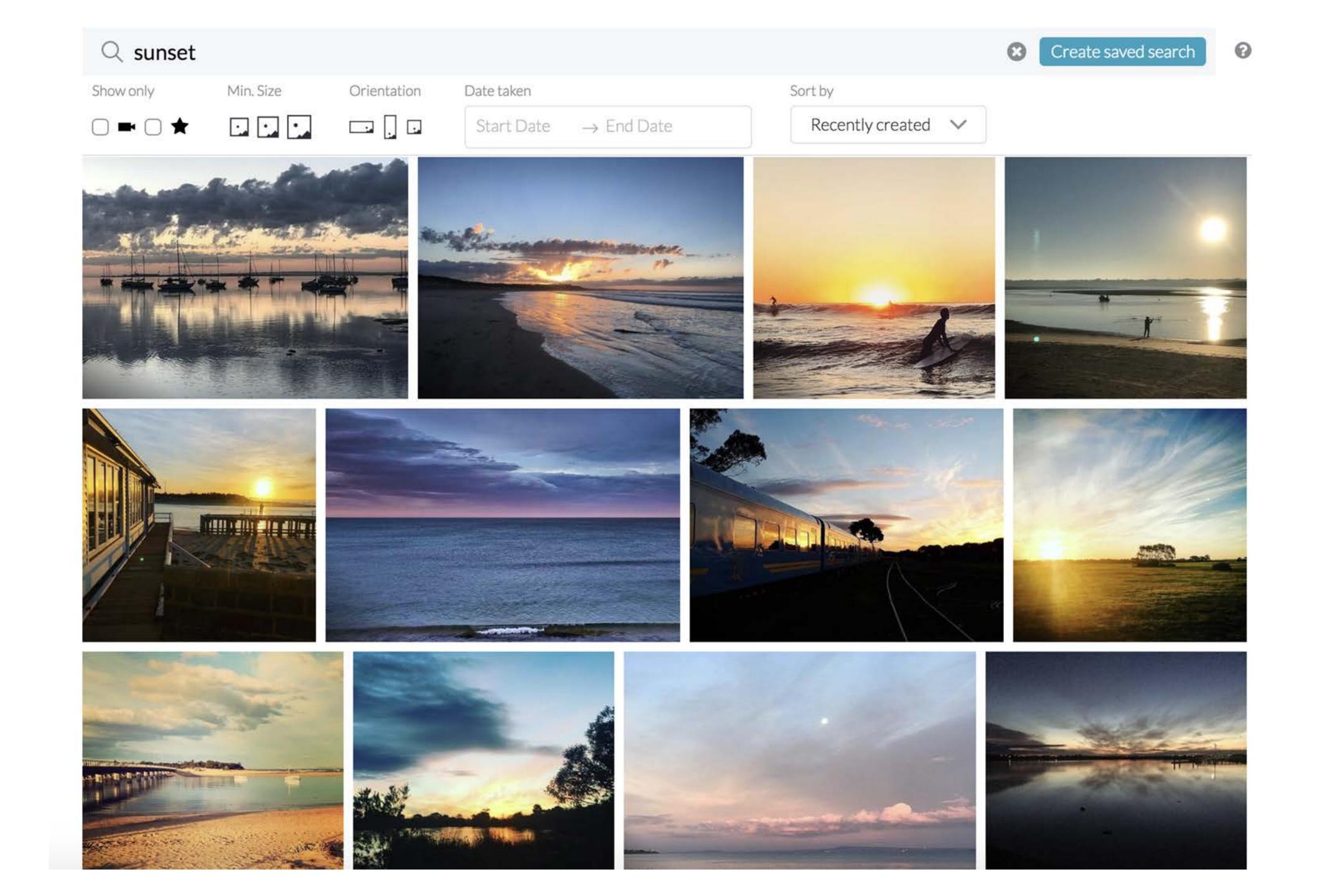










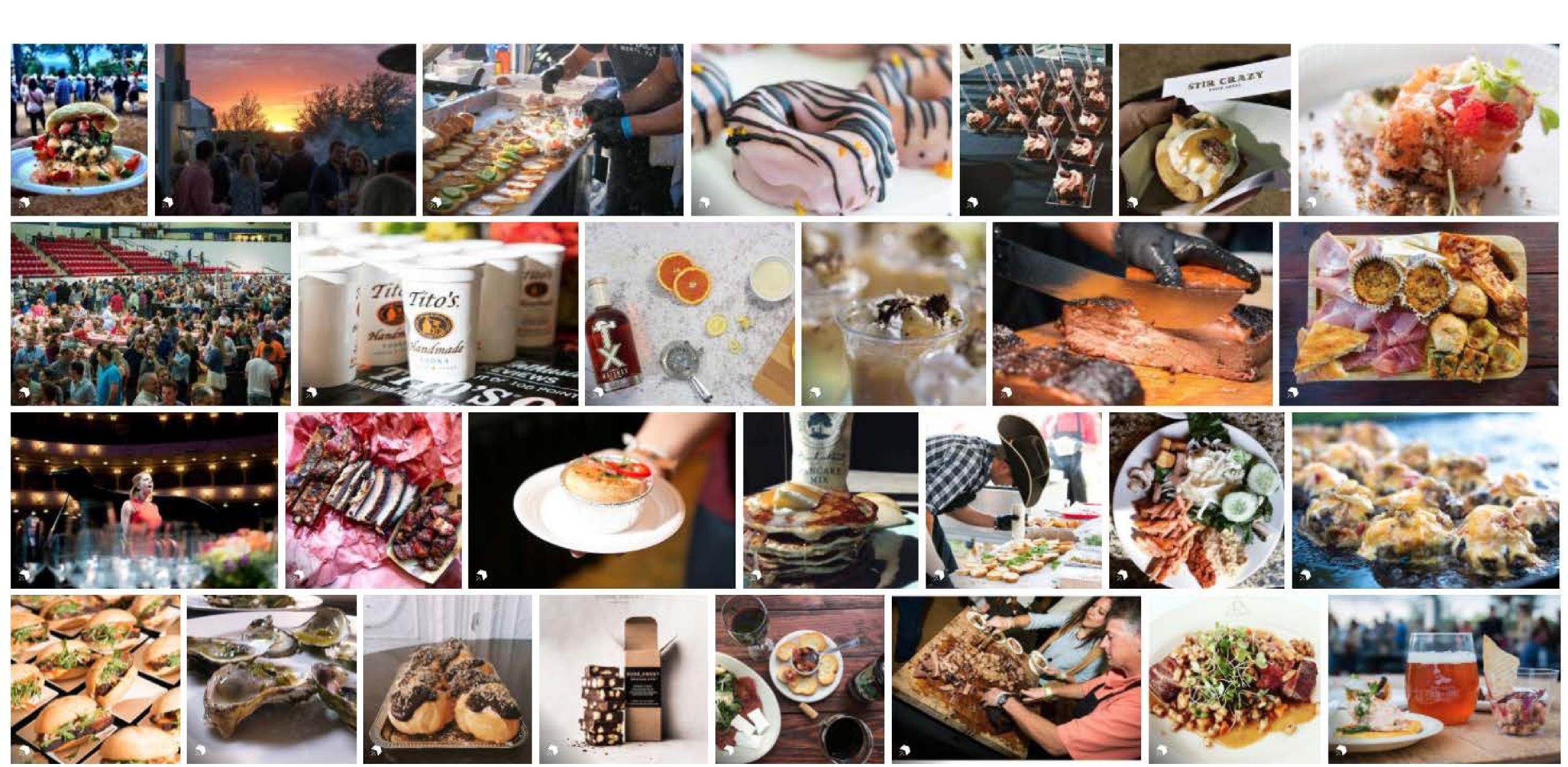


Trend #2

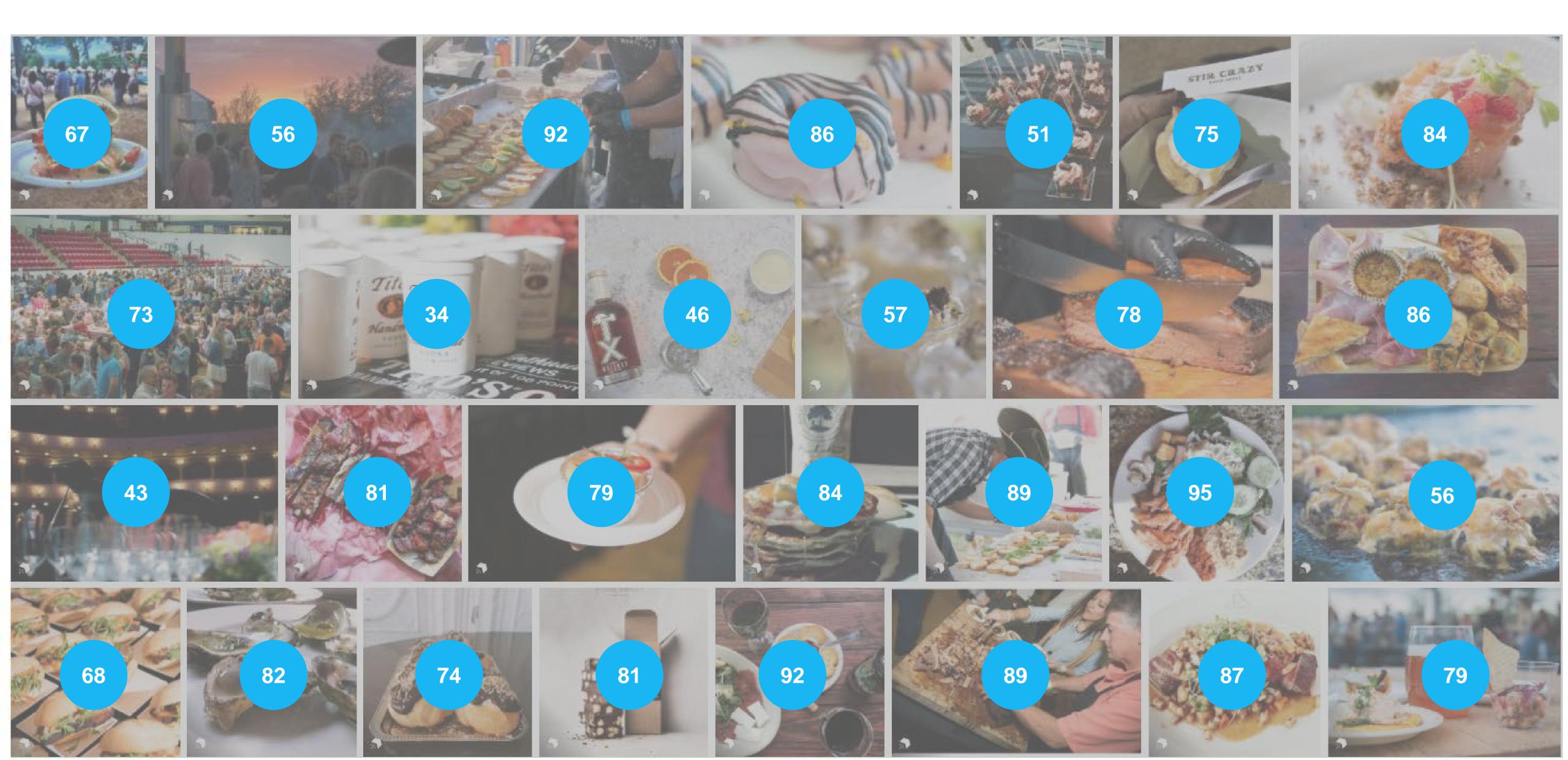
Using data to make more informed decisions around visuals.



Which photos should you use on your website?



Which photos should you use on your website?



Trend #3

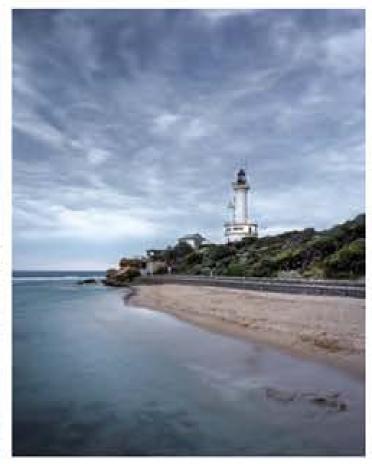
Leveraging marketing automation for visuals.







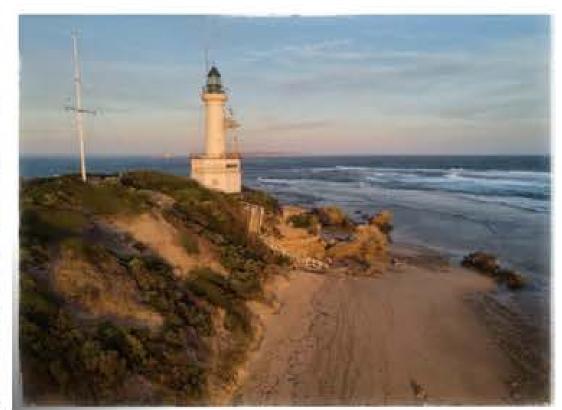
























BOAT TOURS ▼

PLANNING -

EXPERIENCE -

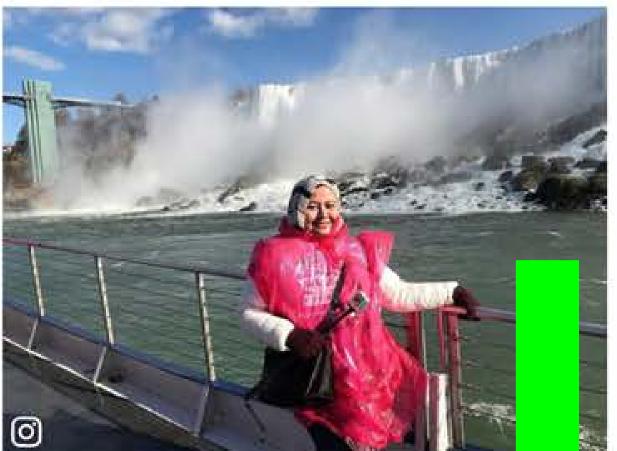
CHARTERS & EVENTS ▼

GROUPS ▼

ABOUT US ▼

BUY TICKETS







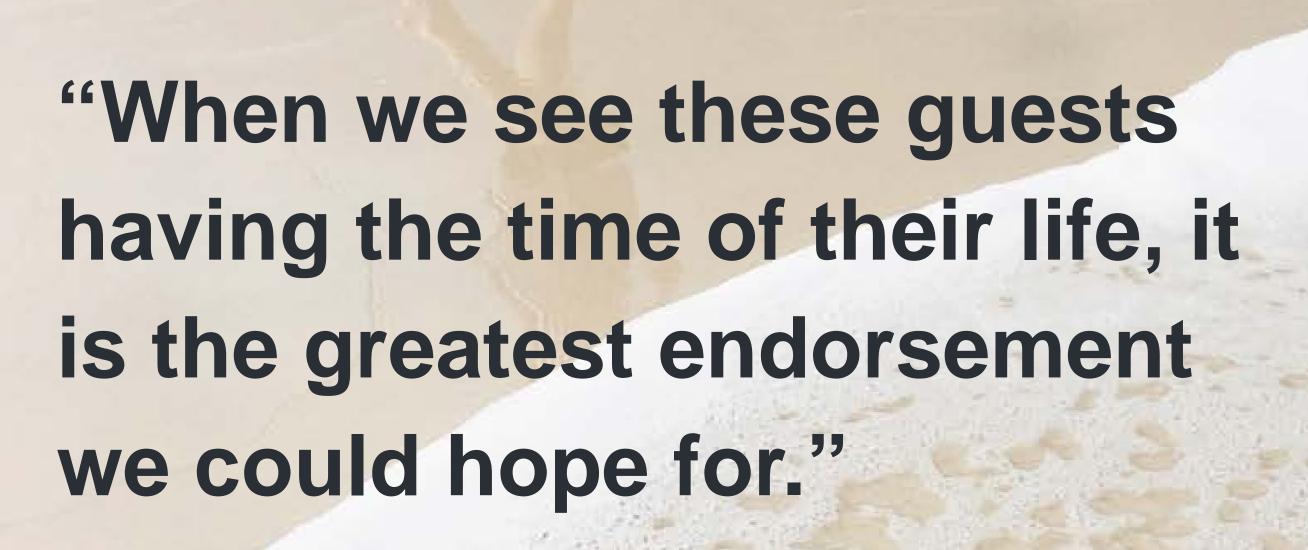














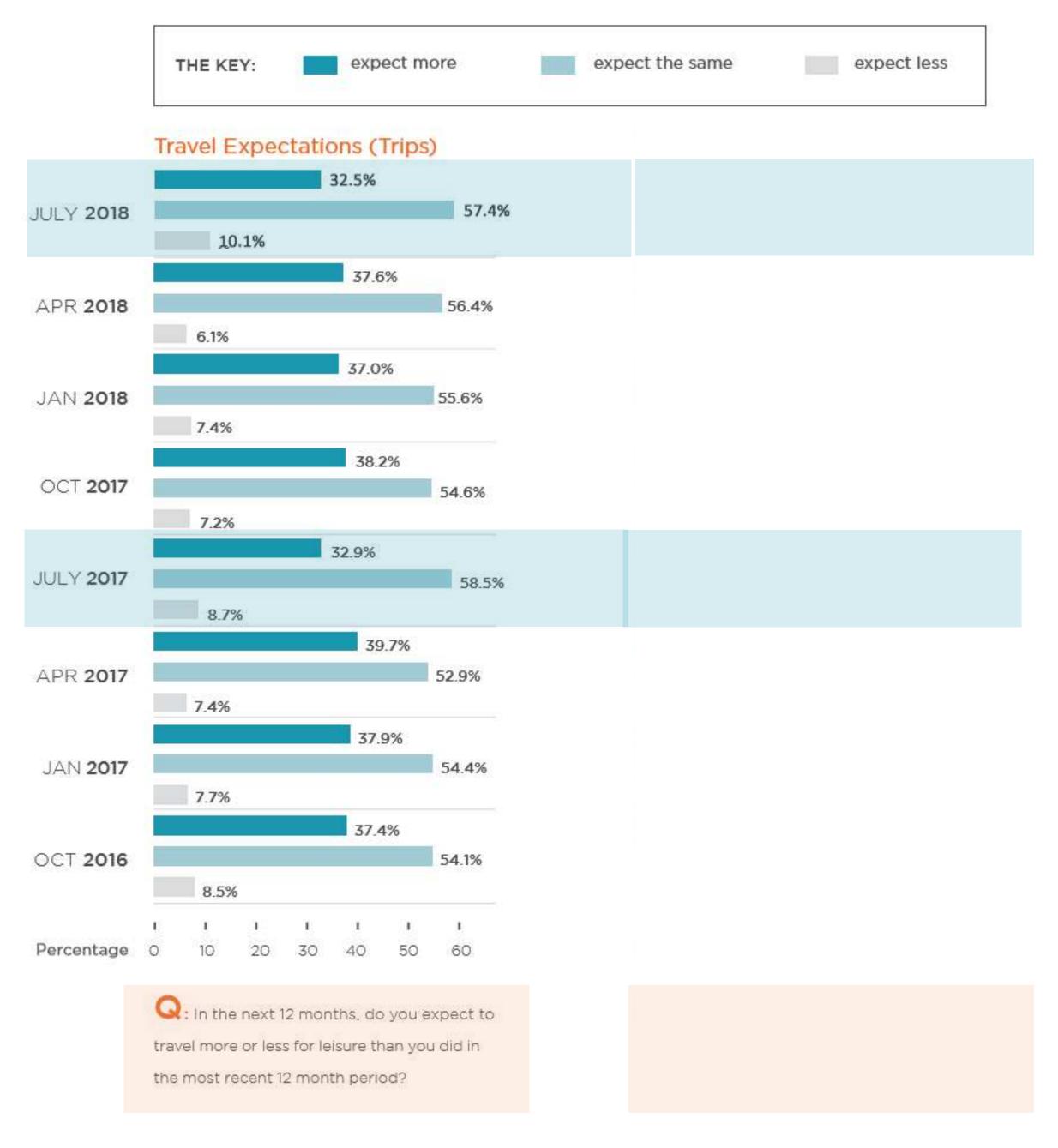


Rich Basen
SVP Marketing & Leisure Sales







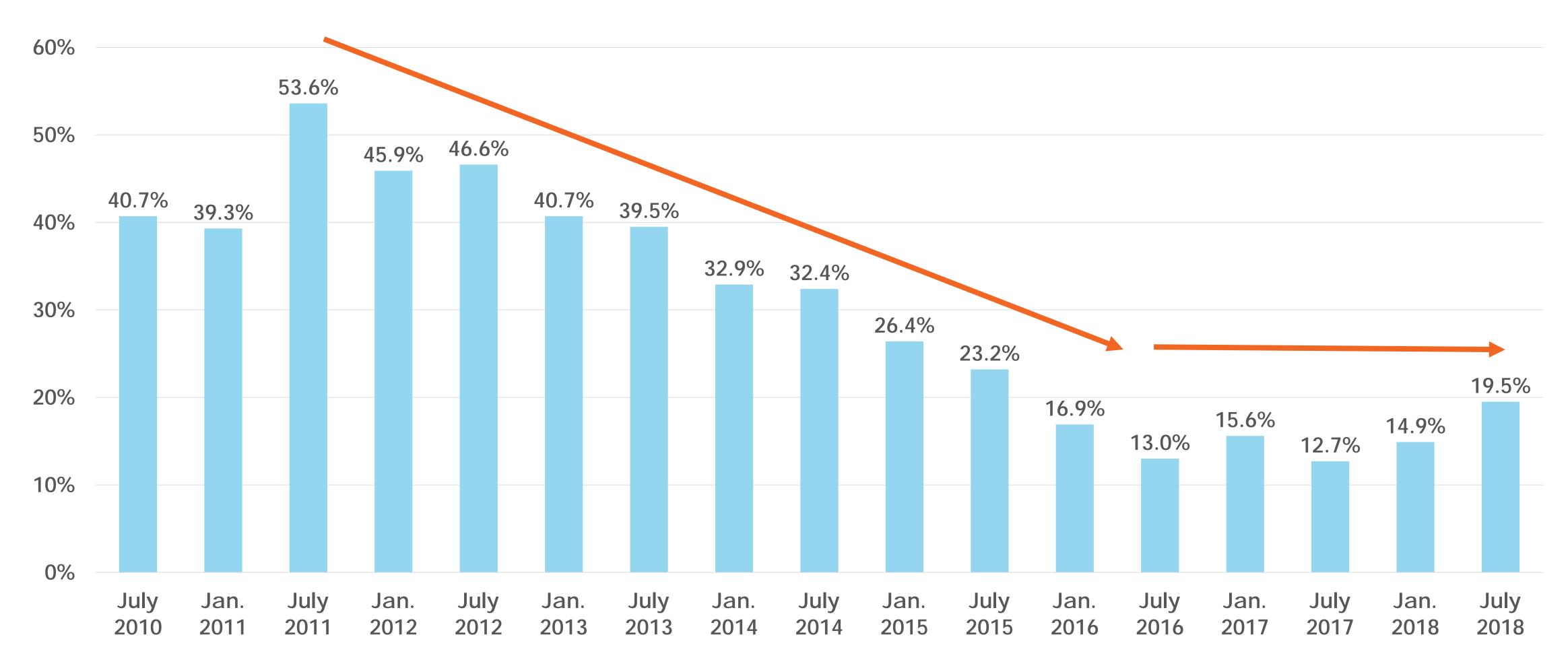


Current Leisure Travel Optimism

Trips & Spending (Next 12 Months)



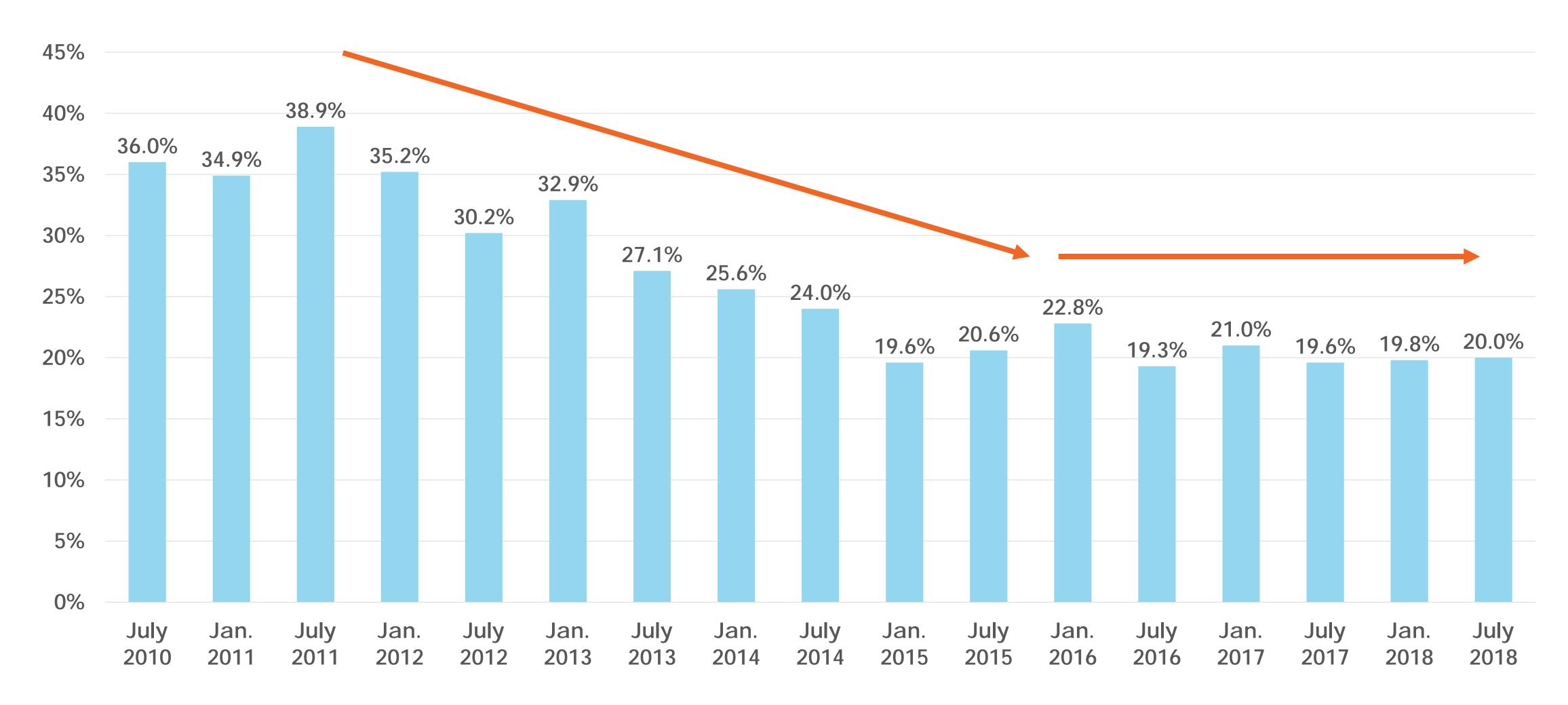
Impediments to Travel: Gasoline Prices







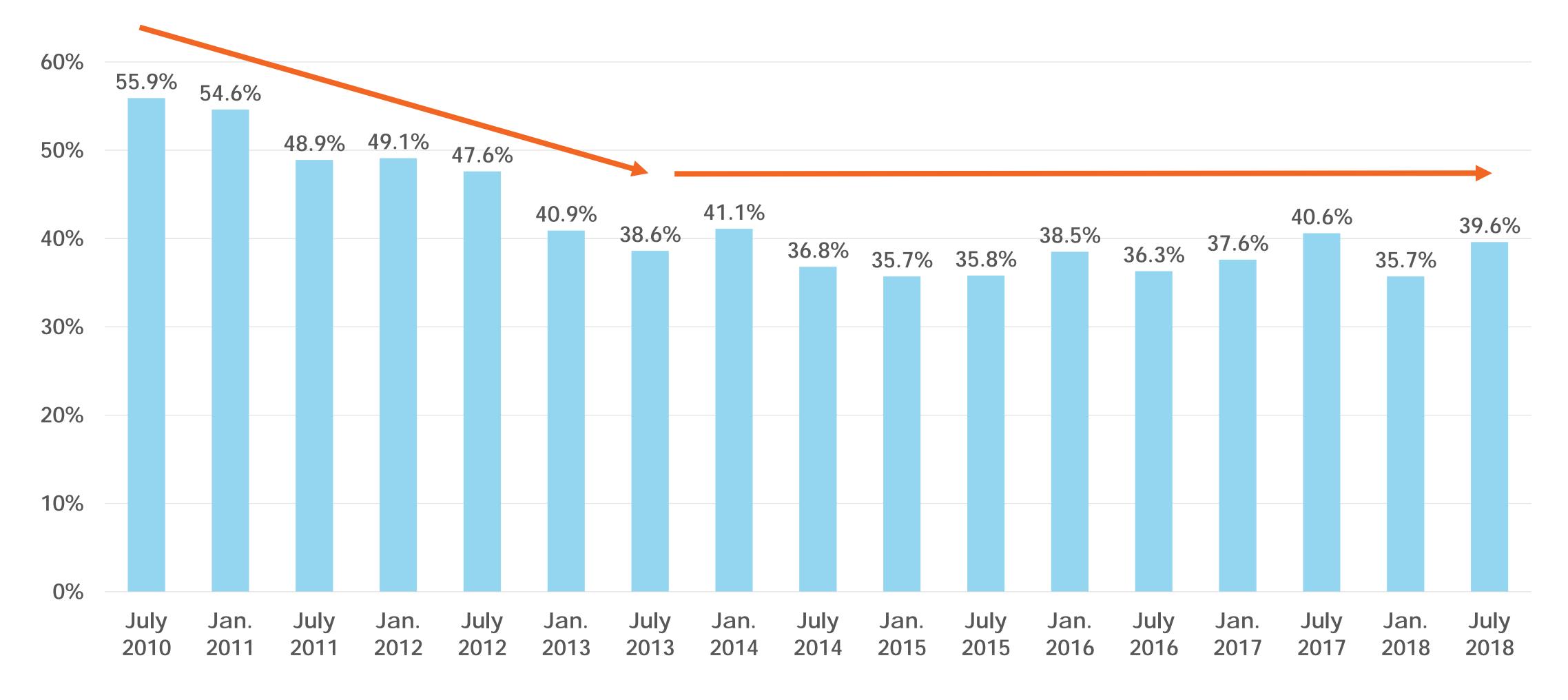
Impediments to Travel: Airfare too Expensive



Percent of Leisure Travelers



Impediments to Travel: Personal Finances



Percent of Leisure Travelers



Travel as a Health Activity



Travelers who consider leisure travel "extremely important" to their overall health and well-being

37.2%

of traveling adult Americans



Most Important Personal Leisure Activities—Ranked First

| | TOTAL | MILLENNIAL | GEN X | BOOMERS | PREBOOM | FEMALE | MALE |
|---|-------|------------|-------|---------|---------|--------|-------|
| Spending time with friends and family | 33.4% | 28.3% | 34.3% | 36.4% | 40.8% | 37.2% | 29.6% |
| Leisure travel | 22.4% | 22.3% | 20.6% | 24.9% | 21.1% | 21.0% | 23.8% |
| Outdoor recreation | 9.7% | 9.1% | 11.3% | 9.2% | 6.8% | 8.7% | 10.6% |
| Culinary activities (cooking, dining out, etc.) | 6.1% | 6.4% | 6.9% | 4.2% | 8.2% | 6.2% | 6.1% |
| Music (enjoying, listening to) | 5.4% | 6.9% | 5.9% | 4.0% | 1.4% | 5.8% | 5.0% |
| Sports and exercise | 5.3% | 6.9% | 5.0% | 4.4% | 3.4% | 3.8% | 6.9% |
| Reading | 4.9% | 4.6% | 4.1% | 5.5% | 7.5% | 5.3% | 4.5% |
| Media consumption (watching television, listening to the radio, surfing the Internet, etc.) | 4.3% | 4.5% | 4.5% | 4.4% | 2.7% | 3.7% | 5.0% |
| Arts, crafts or hobbies | 3.5% | 3.9% | 3.5% | 3.1% | 3.4% | 4.4% | 2.6% |
| Gardening | 2.7% | 3.7% | 2.3% | 2.0% | 2.7% | 2.5% | 2.9% |
| Volunteer activities | 1.1% | 1.6% | 0.8% | 0.9% | 1.4% | 0.7% | 1.6% |
| Education, classes or seminars | 1.1% | 1.6% | 0.9% | 0.9% | 0.7% | 0.7% | 1.6% |
| Base | 2025 | 668 | 664 | 546 | 147 | 1020 | 1005 |

Consider the following personal leisure activities and RANK THE TOP THREE in terms of their overall importance to you? (Percent ranking as #1)



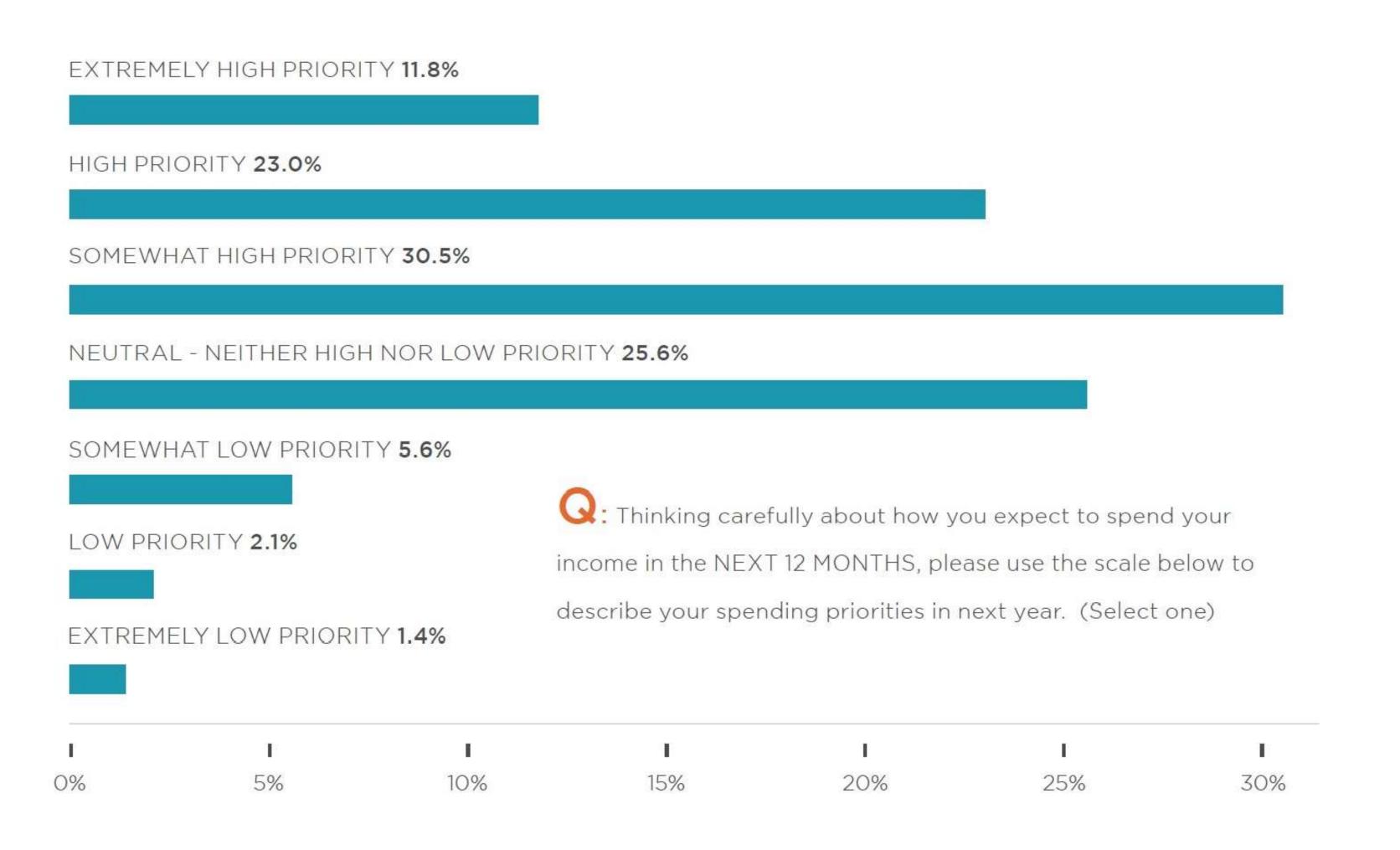
Most Important Personal Leisure Activities—Ranked Top Three

| | TOTAL | MILLENNIAL | GEN X | BOOMERS | PREBOOM | FEMALE | MALE |
|---|-------|------------|-------|---------|---------|--------|-------|
| Spending time with friends and family | 63.5% | 55.8% | 65.1% | 67.8% | 74.8% | 67.0% | 59.9% |
| Leisure travel | 61.8% | 56.3% | 60.8% | 68.1% | 67.3% | 61.3% | 62.3% |
| Outdoor recreation | 37.5% | 40.0% | 41.0% | 32.8% | 28.6% | 36.0% | 39.1% |
| Culinary activities (cooking, dining out, etc.) | 26.5% | 24.3% | 28.8% | 26.6% | 26.5% | 26.3% | 26.8% |
| Music (enjoying, listening to) | 21.1% | 25.0% | 22.6% | 18.1% | 7.5% | 22.2% | 20.0% |
| Sports and exercise | 19.6% | 23.7% | 18.4% | 16.8% | 16.3% | 14.0% | 25.2% |
| Reading | 19.1% | 17.7% | 15.8% | 21.8% | 30.6% | 21.9% | 16.3% |
| Media consumption (watching television, listening to the radio, surfing the Internet, etc.) | 18.0% | 19.6% | 19.0% | 16.5% | 12.2% | 16.5% | 19.6% |
| Arts, crafts or hobbies | 14.7% | 19.3% | 12.0% | 12.5% | 14.3% | 18.6% | 10.7% |
| Gardening | 9.4% | 7.3% | 8.9% | 12.3% | 10.9% | 8.2% | 10.6% |
| Education, classes or seminars | 4.5% | 6.3% | 5.0% | 2.2% | 3.4% | 4.1% | 5.0% |
| Volunteer activities | 4.2% | 4.8% | 2.7% | 4.6% | 7.5% | 4.0% | 4.5% |
| Base | 2025 | 668 | 664 | 546 | 147 | 1020 | 1005 |

Consider the following personal leisure activities and RANK THE TOP THREE in terms of their overall importance to you? (Percent ranking as #1, #2 or #3)

Destination Analysts

Prioritizing Travel: Budget



Prioritization of Travel as a Personal Leisure Activity—Key Takeaways

- o For a majority of American travelers, travel is only behind spending time with friends and family in what they prioritize for their personal leisure. Travel is well ahead of other activities like outdoor recreation and dining out.
- The older one is, the stronger the likelihood to have their priorities focused on travel above other leisure activities. Baby Boomers are the likeliest to prioritize travel. Millennial American travelers are more diverse in their priorities.
- Although personal finance remains the top hinderance to Americans travelling as much as they would like, Americans are demonstrating this commitment to travel in how much they are prioritizing their spending on leisure travel and the strong amounts they are spending, as well.





Destination Analysts Do Your RESEARCH

The State of the American Traveler: Traveler Segments Edition

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





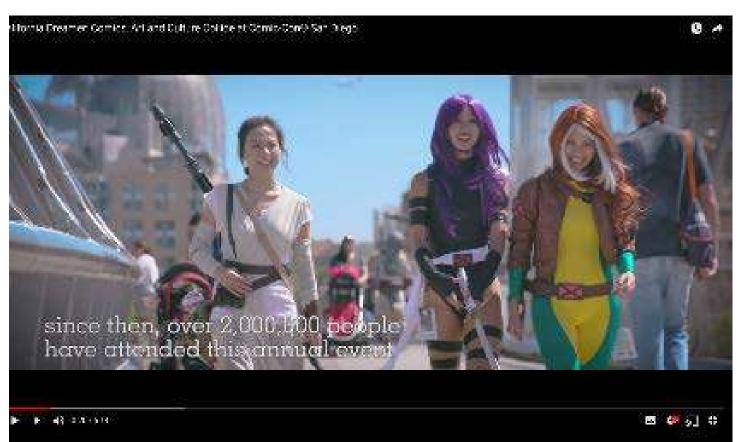


Blog Post Series: Top Performing DMO Videos (& Vloggers)

3 Day Blog Series August 6, 7 & 8th

An analysis of the YouTube Channels of 150+ of the world's largest Destination Marketing Organizations including the 10 top performing online videos by these









DMOs.

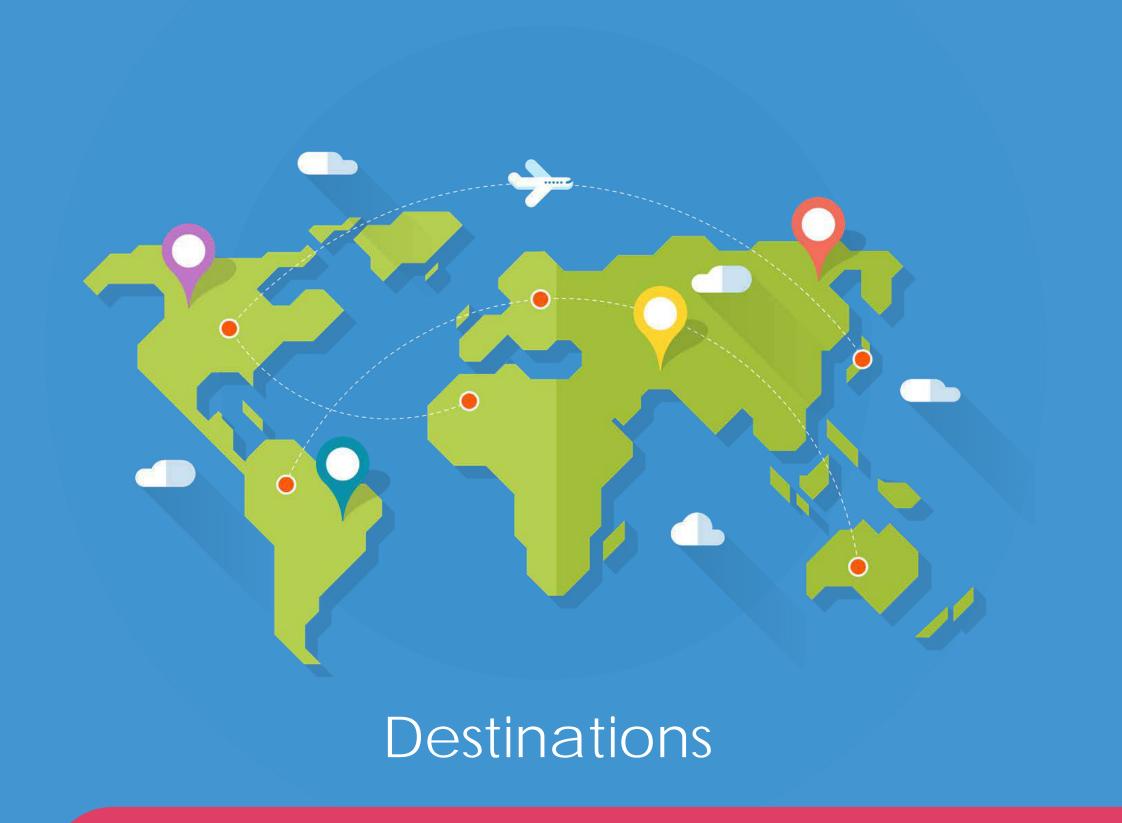
Global All-Stars at Destinations International

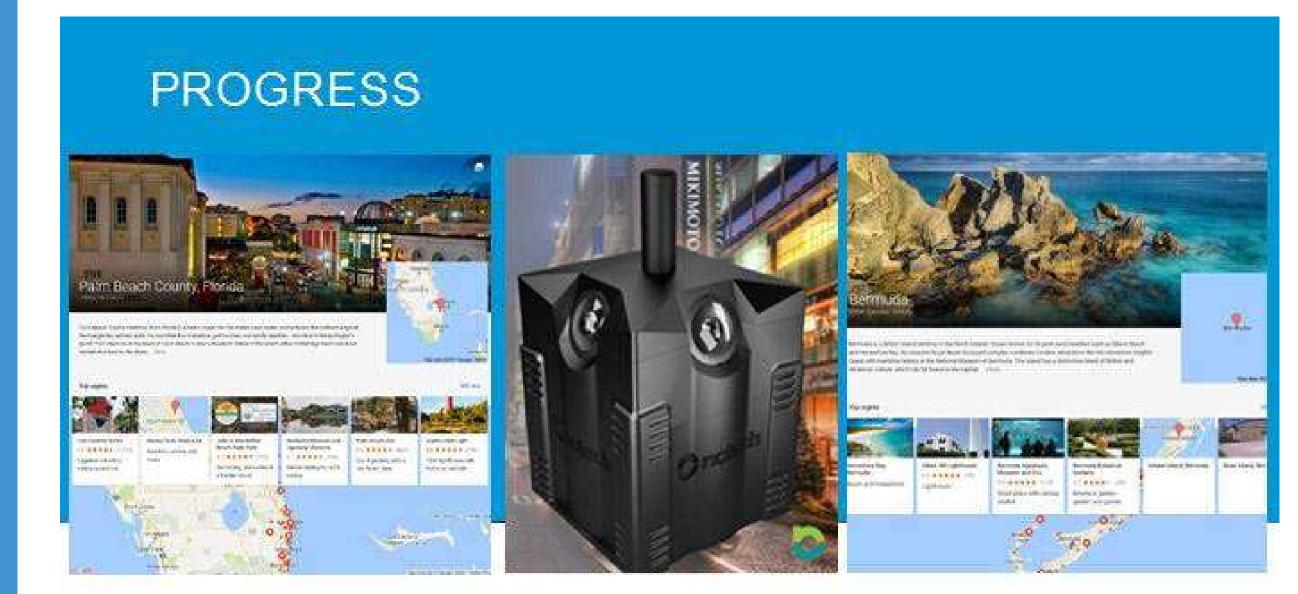


Google









Google DMO Partnership Program Workshop
Destinations International Conference
www.MilesPartnership.com/GoogleDMOProgram

ESTO Learning Labs: Saturday, August 11, 2018

How Industry Co-Ops Can Empower Your DMO Best Practices and Essential Skills



August 11, 2018, Phoenix, Arizona 2:00pm to 3:30pm and 3:45pm to 5:15pm



Presenters: Chris Adams, Laura Libby and Paul Winkle



