

THE STATE OF THE AMERICAN TRAVELER

# DESTINATION MANAGEMENT & SUSTAINABLE TRAVEL EDITION

NOVEMBER 15, 2022

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Destination  Analysts

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# With You

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**Chris Adams**  
*Head of Research & Insights  
Miles Partnership*



**Jamie Tokuno**  
*Director of Research  
Destination Analysts*



**Laura Libby**  
*Senior Vice President  
Miles Partnership*



**Matt Berna**  
*President of North America  
Intrepid Travel*

# THE STATE OF THE AMERICAN TRAVELER: DESTINATION MANAGEMENT EDITION

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Research, slides and other resources will be available at

[www.milespartnership.com/SAT](http://www.milespartnership.com/SAT)

[www.destinationanalysts.com](http://www.destinationanalysts.com)



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# Agenda

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1. New 27 for COP-27 White Papers
2. Current Traveler Sentiment
3. Destination Management Edition Research
4. Spotlight on Intrepid Travel
5. Additional Resources
6. Q&A

# 27 for COP27

UPDATED TWO-PART WHITE PAPER SERIES

Updated for COP27. 27 Actions For Destinations and Their Tourism Industries to Address Climate Change



[MilesPartnership.com/ClimateChange](https://MilesPartnership.com/ClimateChange)



In association with:



# Zero Carbon Itinerary



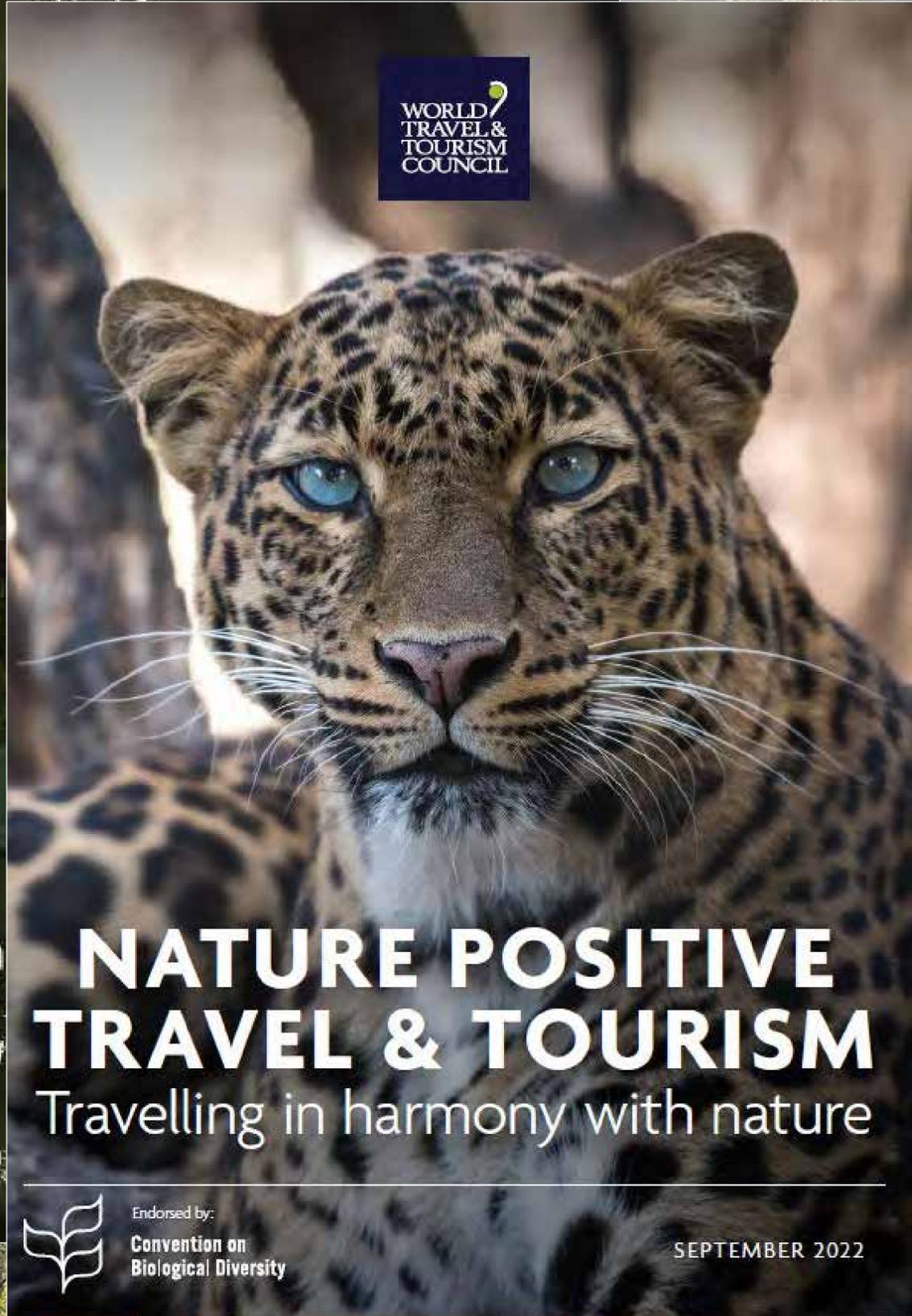
REGISTER



OL'AU PALAU

**The first tourism initiative  
that unlocks new  
experiences and places  
through sustainable action.**





# Nature-based Solutions (NbS)

Climate Action  
*Unlocking the  
and Nature*

**NATURE POSITIVE  
TRAVEL & TOURISM**  
Travelling in harmony with nature



Endorsed by:  
**Convention on  
Biological Diversity**

SEPTEMBER 2022



Greenhouse Gasses  
Reduced:  
**CO<sub>2</sub>**  
Carbon Dioxide

Solutions Number 16 in *Drawdown* –  
Conservation Agriculture  
[Learn More](#)



Greenhouse Gasses  
Reduced:  
**CO<sub>2</sub>**  
Carbon Dioxide

Solutions 12 and 38 in *Drawdown* –  
Temperate Forests and Forest Protection  
[Learn More](#)



# Sustainability Basic framework

An inclusive model for hotel sustainability

ACCOR | BARCELÓ HOTEL GROUP | DEUTSCHE HOSPITALITY | HUAZHU  
INDIAN HOTELS COMPANY LIMITED | JIN JIANG INTERNATIONAL | LOUVRE HOTELS GROUP  
MELIÁ HOTELS INTERNATIONAL | MINOR HOTELS | NH HOTEL GROUP | RADISSON HOTEL GROUP



# SINGAPORE HOTEL SUSTAINABILITY ROADMAP



## VISION

To create a hotel industry in Singapore that



Integrates sustainability as a core value across the entire hotel ecosystem



Is established as a living lab for innovation and utilises sustainability as a key thrust to drive business competitiveness and growth



Is recognised as a leader for sustainability

## TARGETS



At least 60% of hotel room stock to achieve internationally-recognised hotel sustainability certification (e.g. by the Global Sustainable Tourism Council) by 2025



For hotels to commence tracking by 2023, reduce emissions by 20% by 2025 and view to achieve net-zero emissions by 2050

## 4 CORE AREAS OF FOCUS



Water Conservation



Energy Conservation



Waste Management, Recycling & the Circular Economy



Sustainability and People

Co-developed by



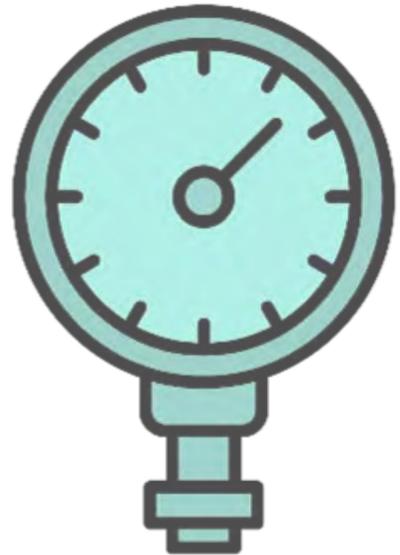
**We support the global commitment  
to halve emissions by 2030 and reach  
Net Zero as soon as possible before  
2050.**



**Glasgow Declaration**  
Climate Action in Tourism

# All committed to five pathways

**Measure**



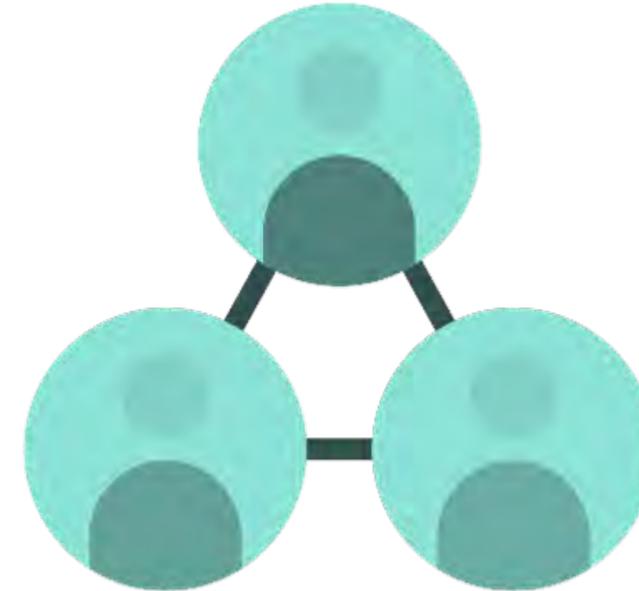
**Decarbonise**



**Regenerate**



**Collaborate**



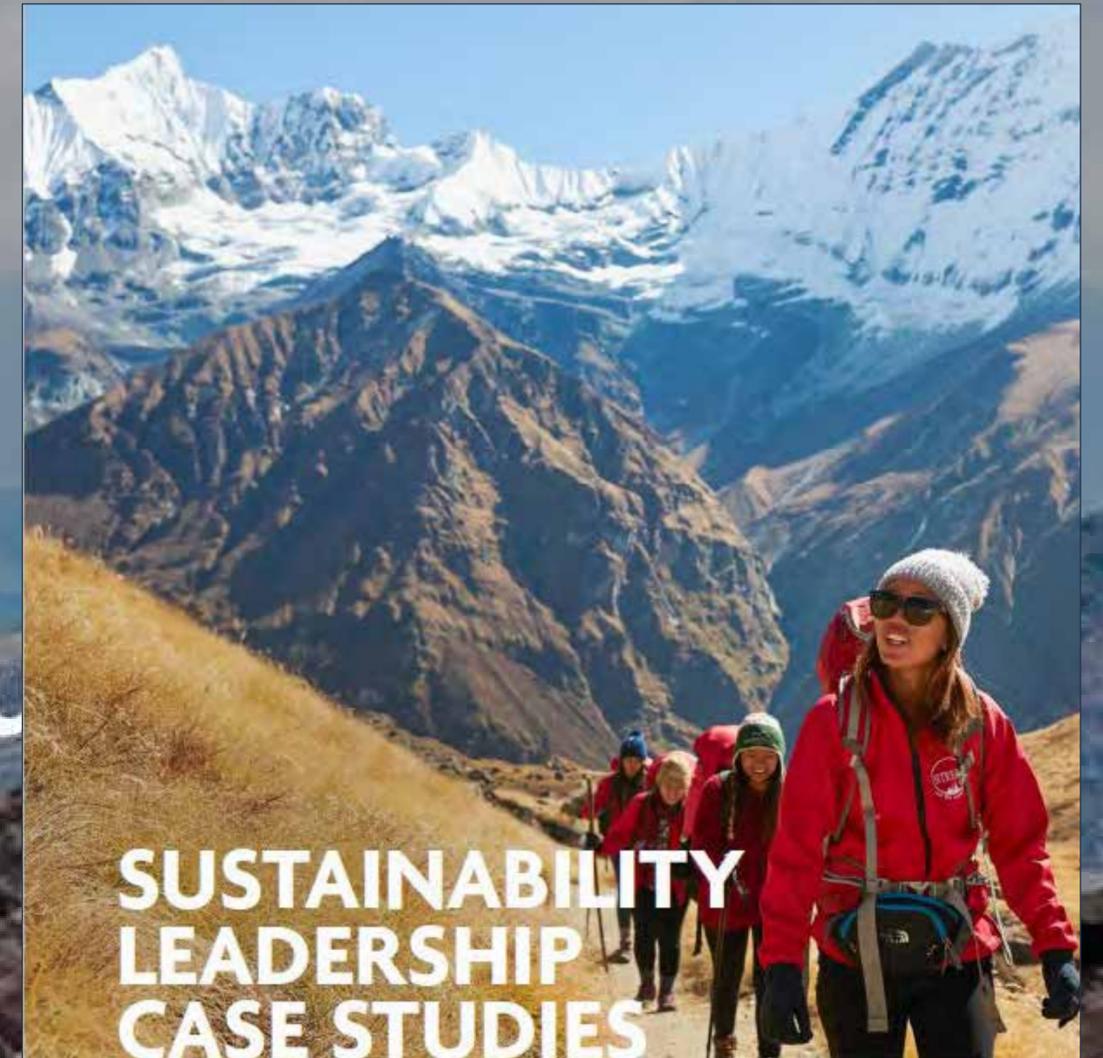
**Finance**



# Why support The Intrepid Fou

Since 2002, The Intrepid Foundation has supported over 130 organisations to create positive impact through the joy of travel, community and connection.

## Here's how we create positive impact, together



## SUSTAINABILITY LEADERSHIP CASE STUDIES

Intrepid Travel: Certified B Corporation



MAY 2021

# 27 for COP27

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[MilesPartnership.com/ClimateChange](https://MilesPartnership.com/ClimateChange)



In association with:





# THE STATE OF THE AMERICAN TRAVELER

## Destination Management & Sustainable Travel Edition

November 15, 2022

Destination  Analysts

# 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 4,000 American travelers**
- **Examines traveler sentiment, motivations & behaviors**
- **Monthly project**





# CURRENT TRAVELER SENTIMENT



**Question:** 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? (Select one)



**Question:** 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? (Select one)

# LEISURE TRAVEL OPTIMISM

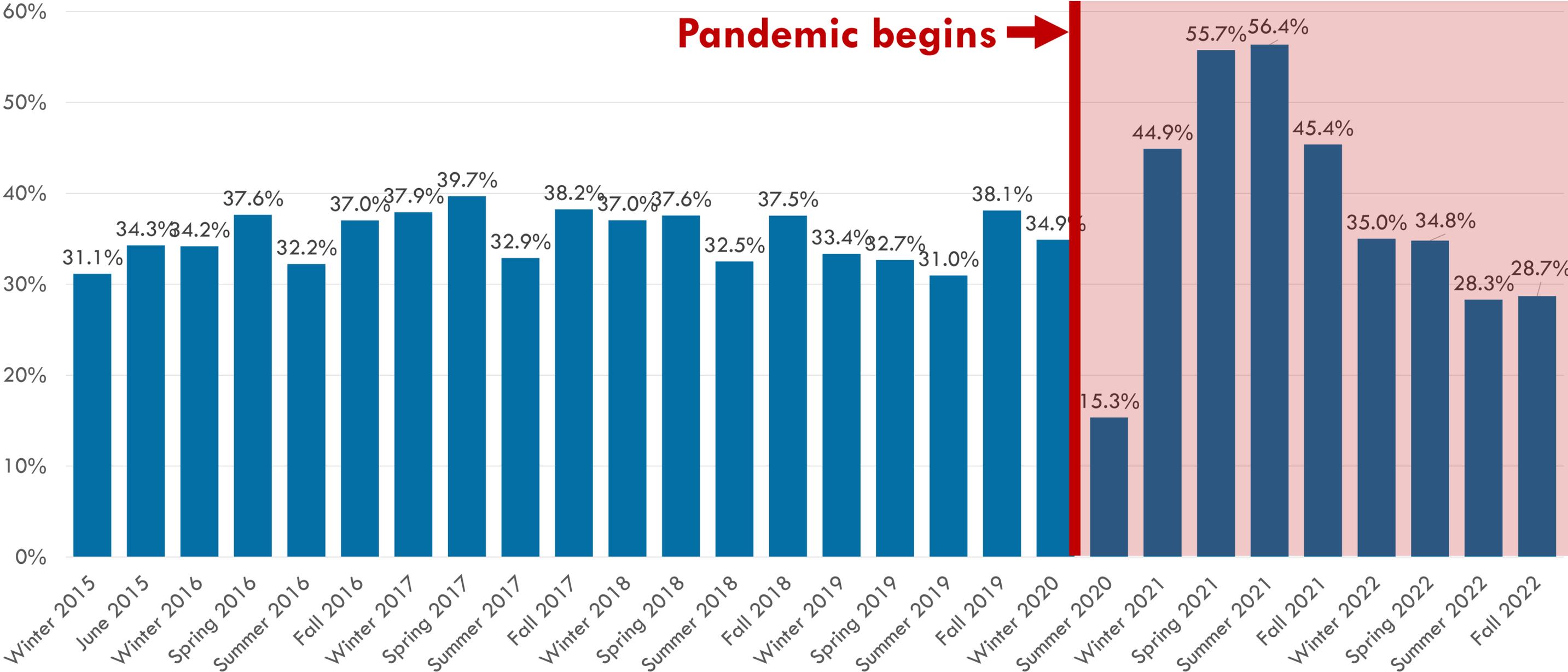
**Q:** In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?

28.7%

**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?

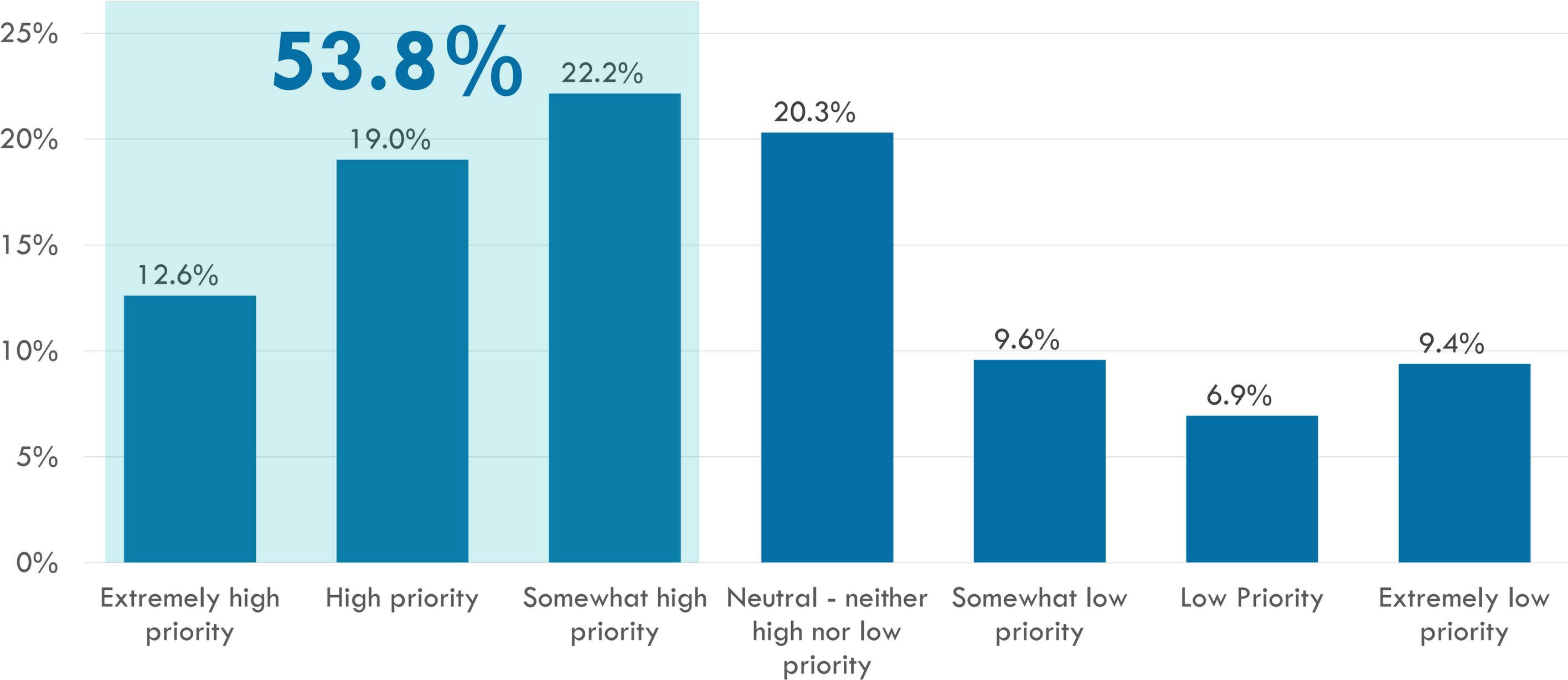
31.8%

# LEISURE TRAVEL OPTIMISM: EXPECTED TRIPS

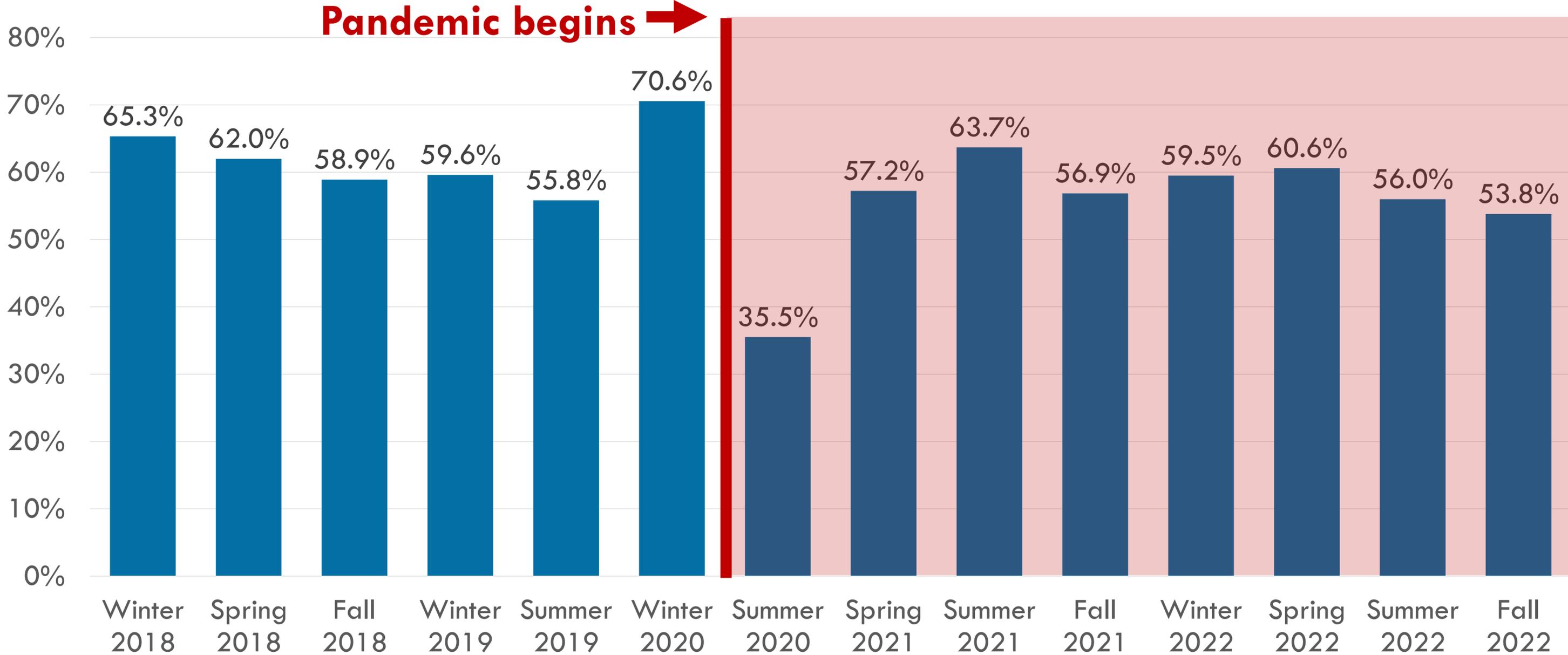


\*1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022

# LEISURE TRAVEL AS A BUDGET PRIORITY, OCTOBER 2022

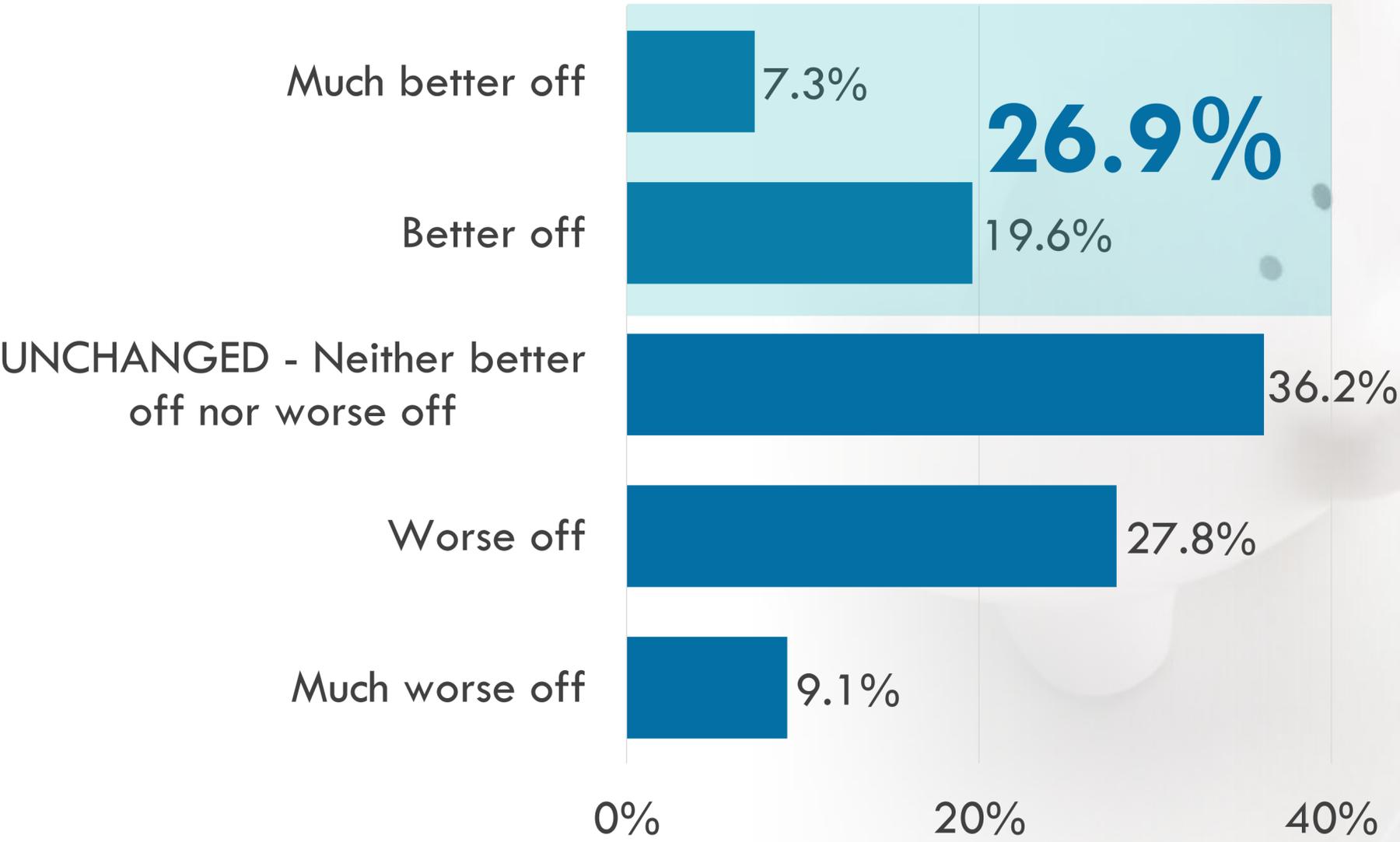


# LEISURE TRAVEL AS A BUDGET PRIORITY



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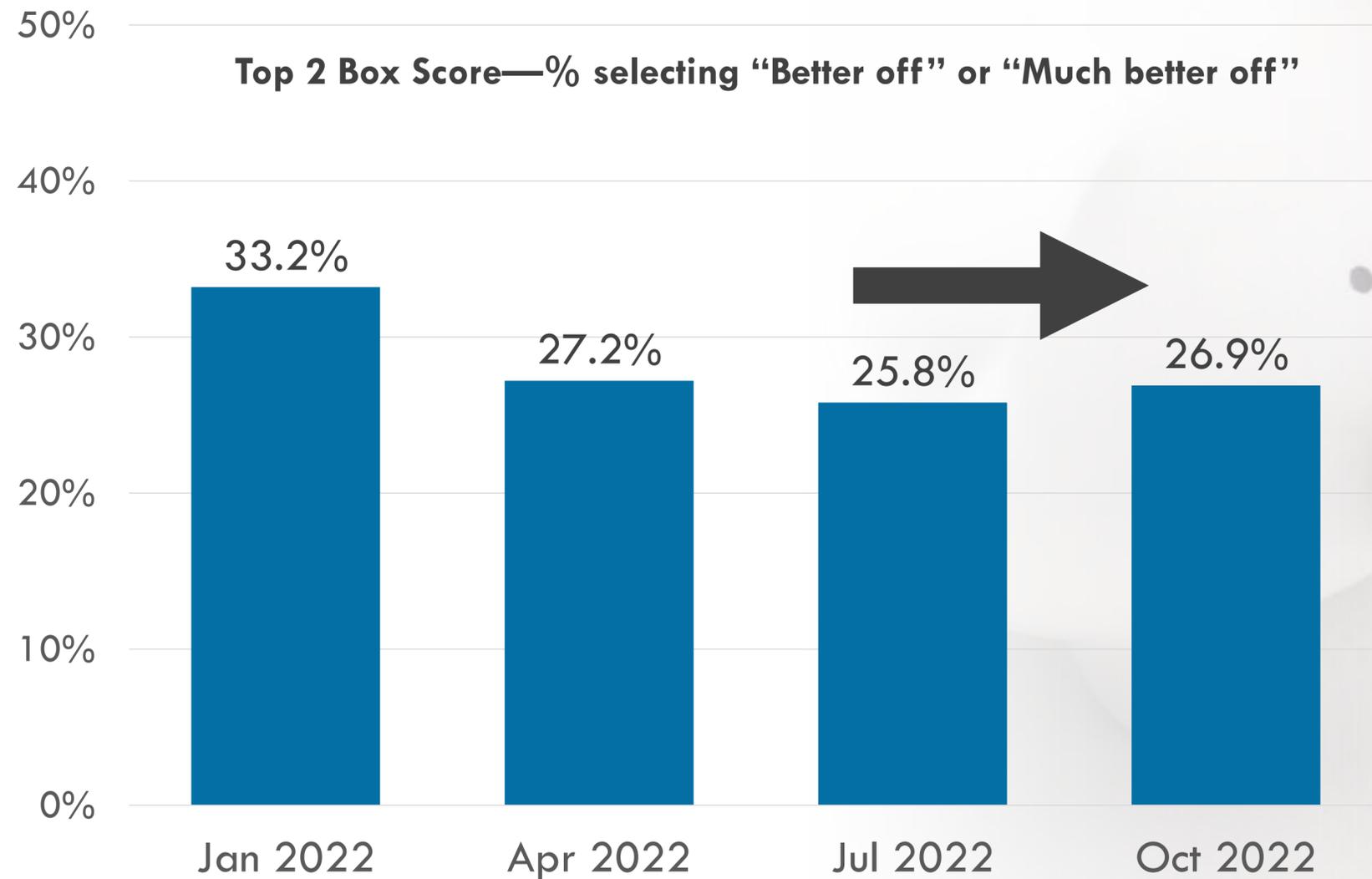
# CURRENT HOUSEHOLD FINANCIAL SITUATION



**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)

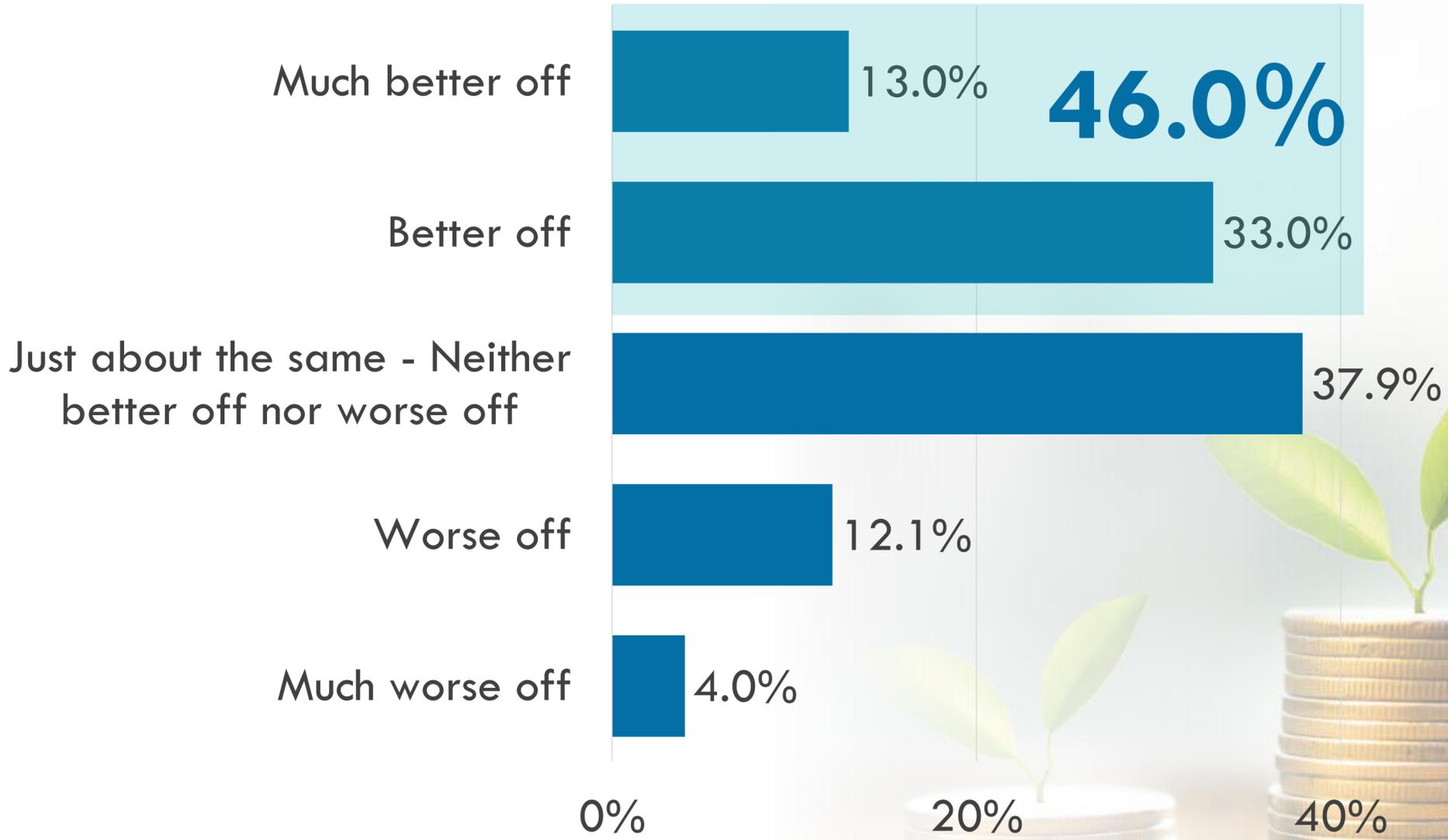


# CURRENT HOUSEHOLD FINANCIAL SITUATION



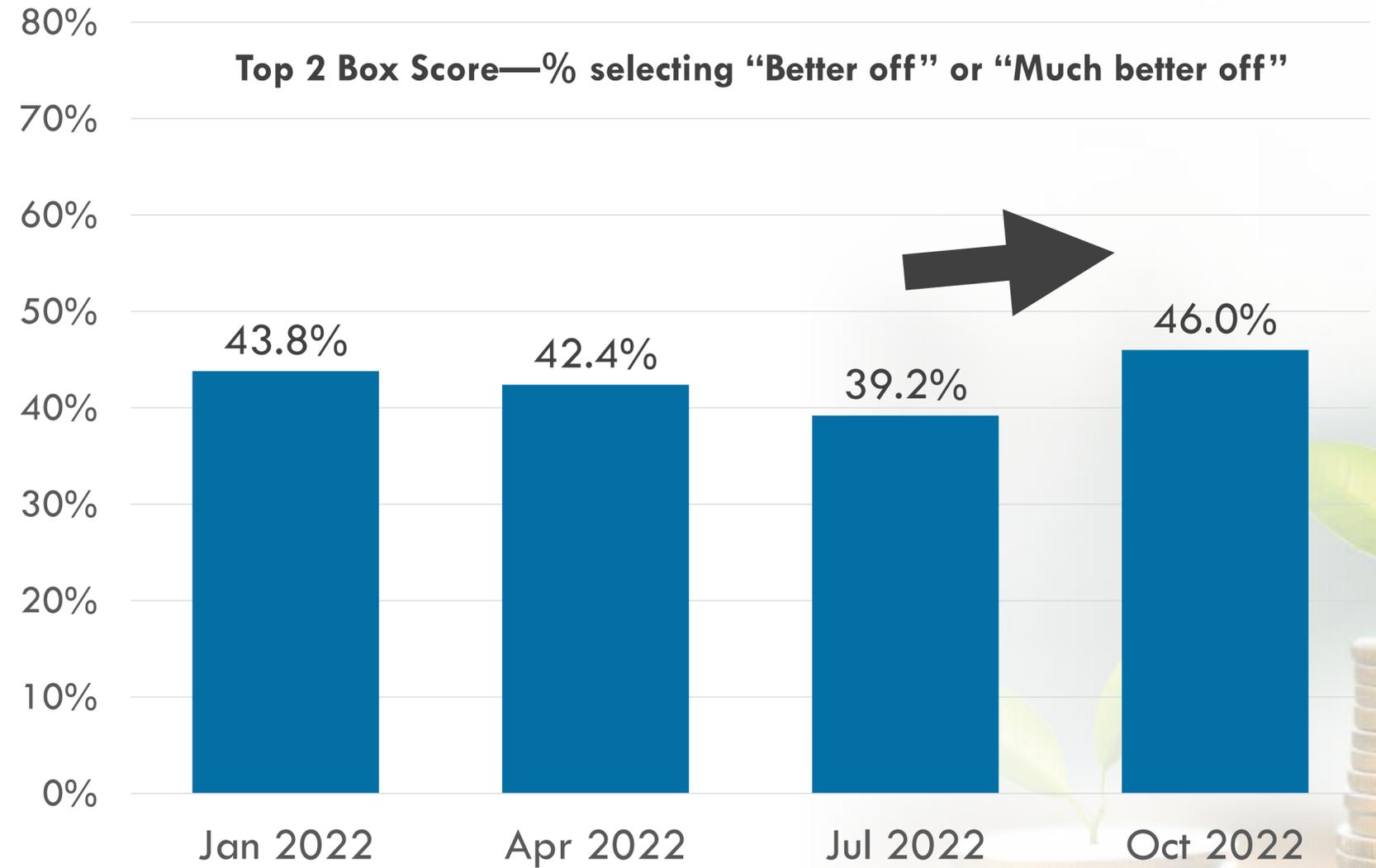
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)

# HOUSEHOLD FINANCIAL SITUATION: EXPECTATIONS



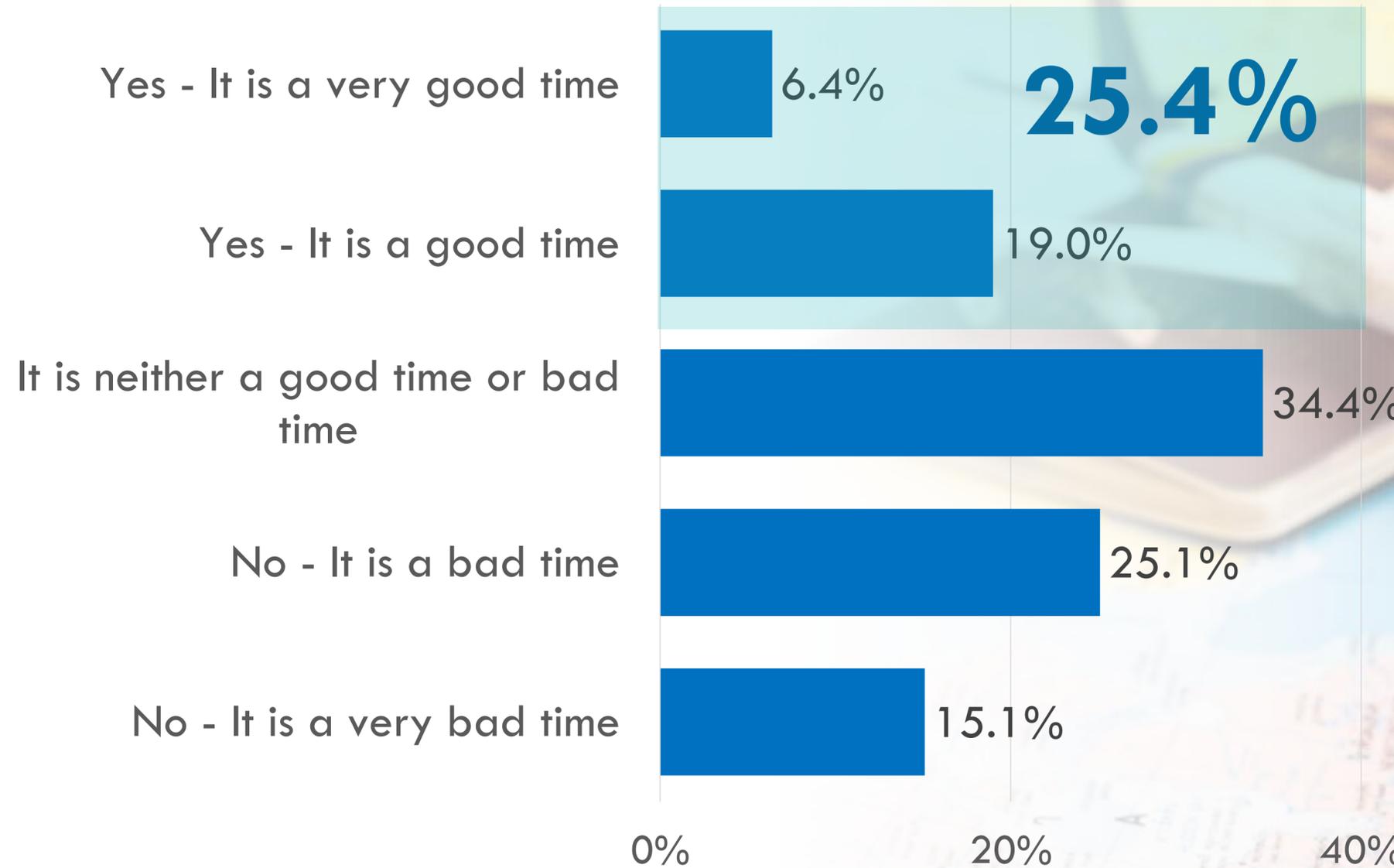
**Question:** LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?)

# HOUSEHOLD FINANCIAL SITUATION: EXPECTATIONS



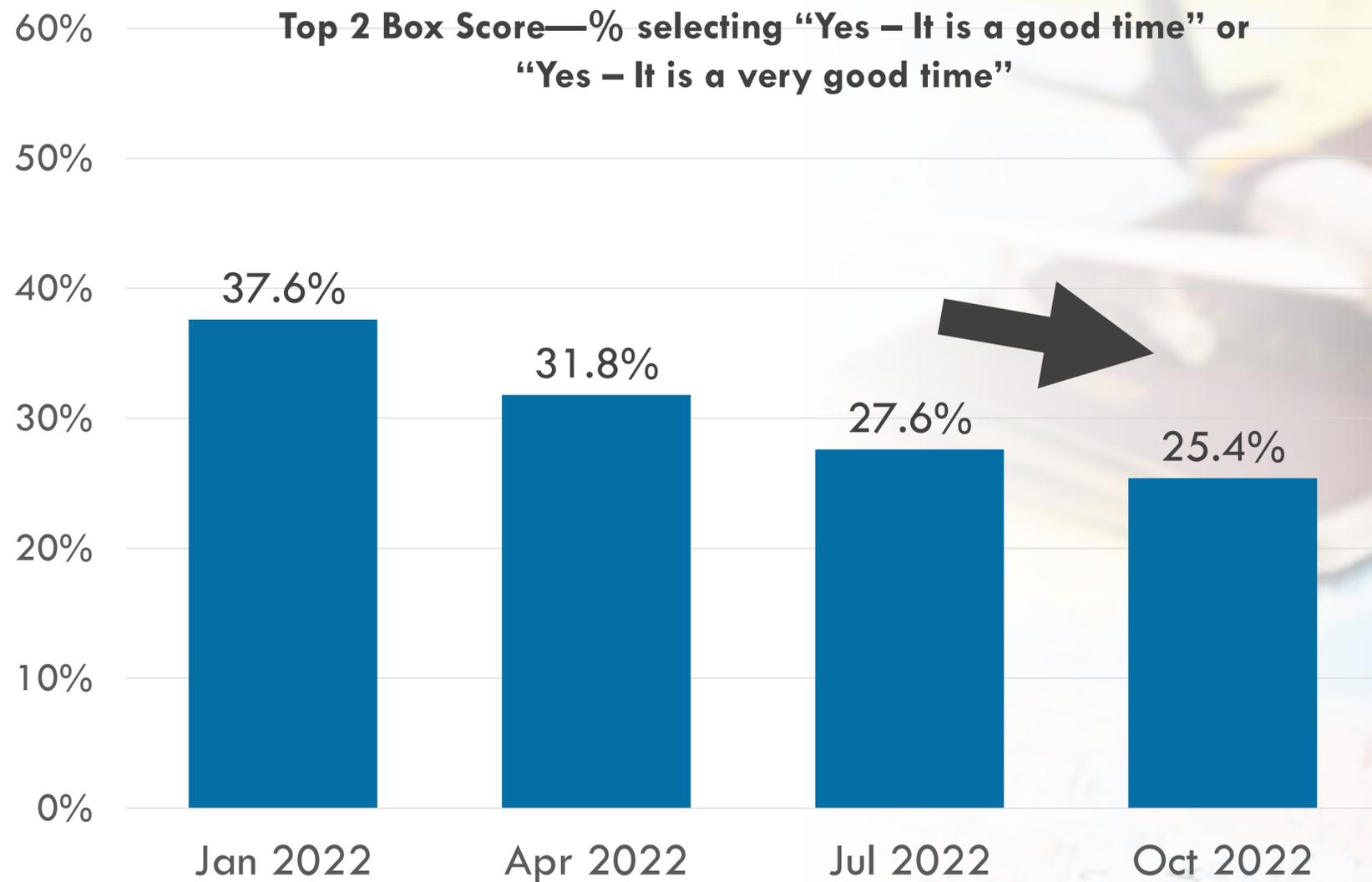
**Question:** LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?)

# IS NOW A GOOD TIME TO SPEND ON TRAVEL?



**Question:** Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

# IS NOW A GOOD TIME TO SPEND ON TRAVEL?



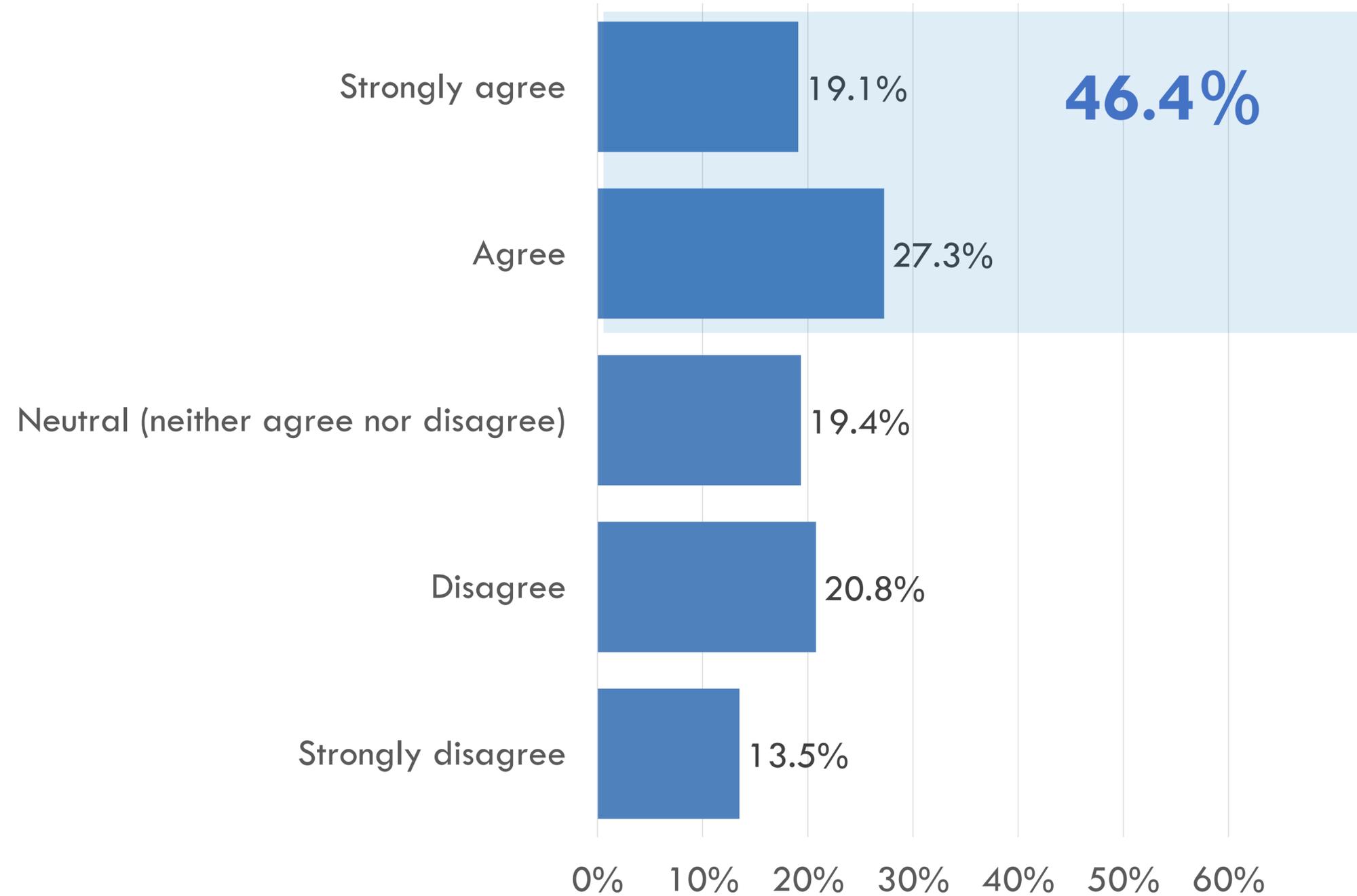
**Question:** Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

# TRAVEL PRICES AS AN IMPEDIMENT TO TRAVEL

**Question:** How much do you agree or disagree with the following statements?

**High travel prices have kept me from traveling in the past month.**

*(Base: All respondents, 4,035 completed surveys. Data collected October 14-22, 2022.)*

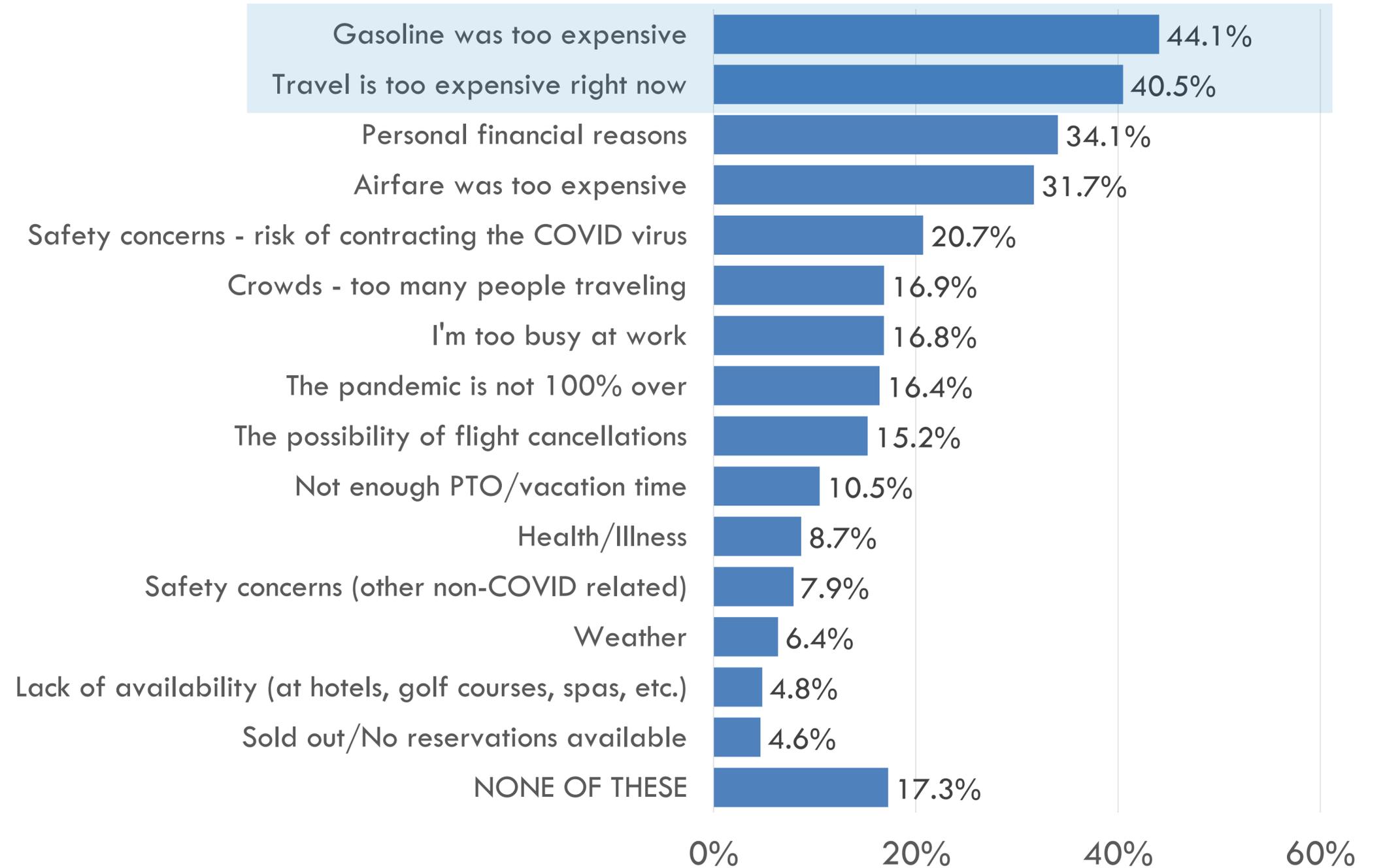


# DETERRENTS TO TRAVELING IN THE PAST 6 MONTHS

**Question:** In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

(Base: All respondents, 4,035 completed surveys.)

Data collected October 14-22, 2022.)



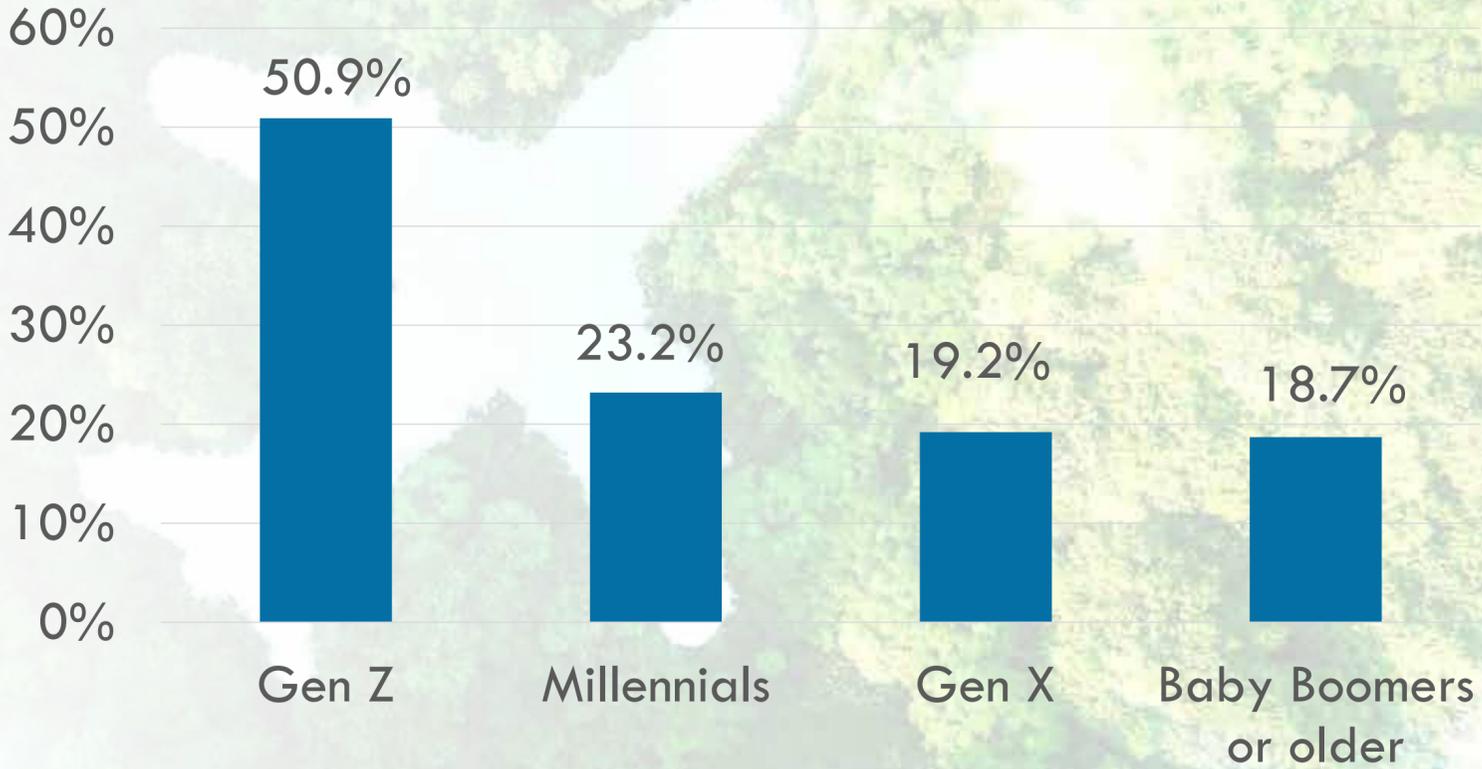
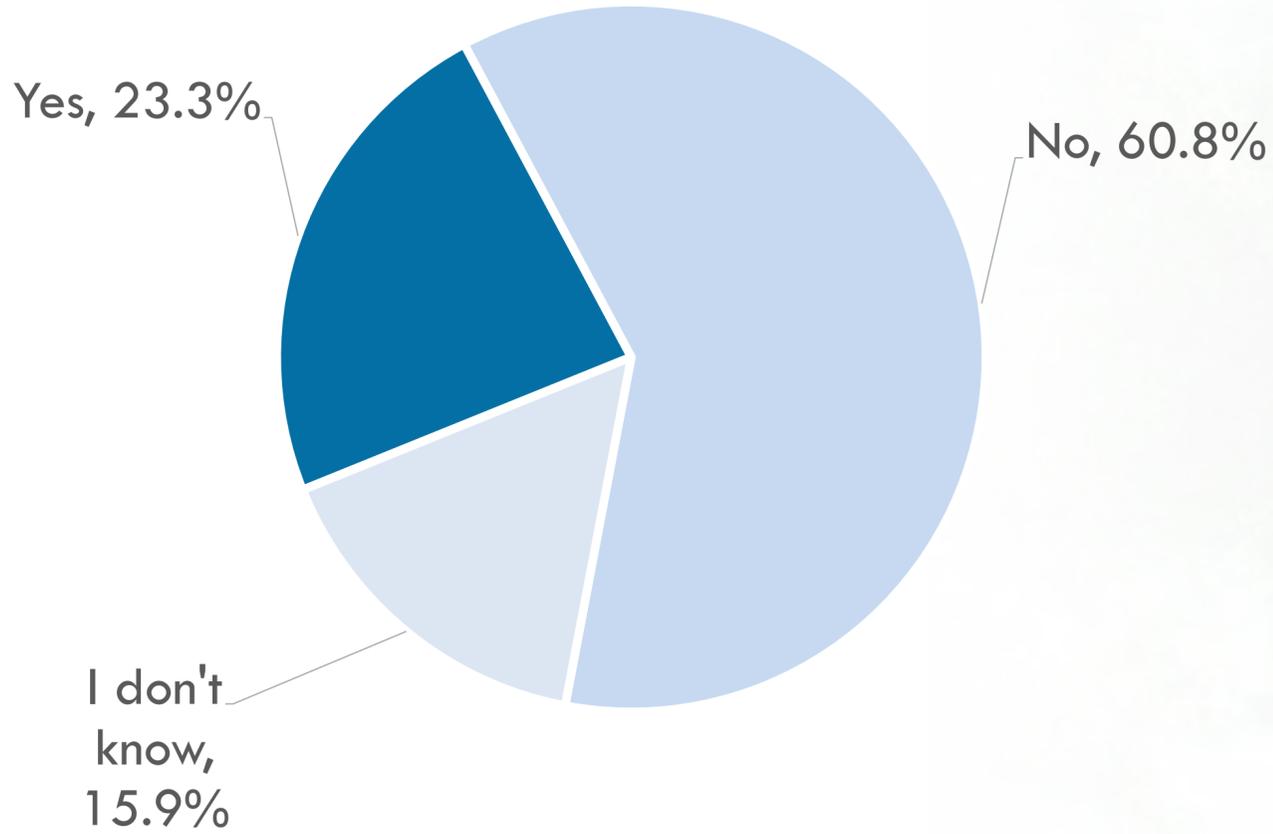
- **ENVIRONMENTAL CONCERNS**

- **CLIMATE CHANGE**

- **COMMUNITIES AND THE IMPACT OF OVER-TOURISM**

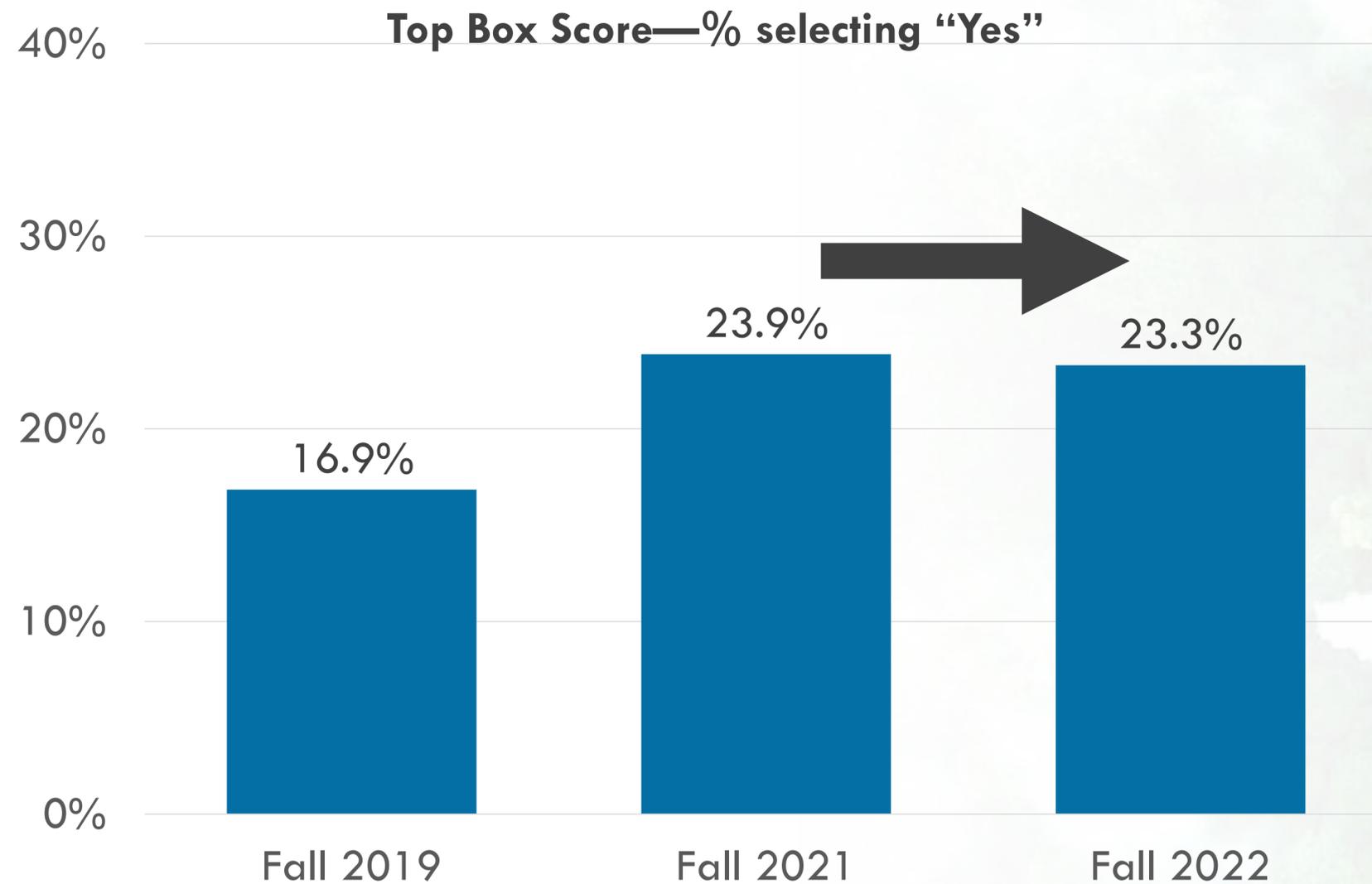
# LEISURE TRAVEL HAVING A NEGATIVE IMPACT ON THE ENVIRONMENT

## BY GENERATION



**Question:** Do you believe that people traveling for leisure have an overall negative impact on the environment?

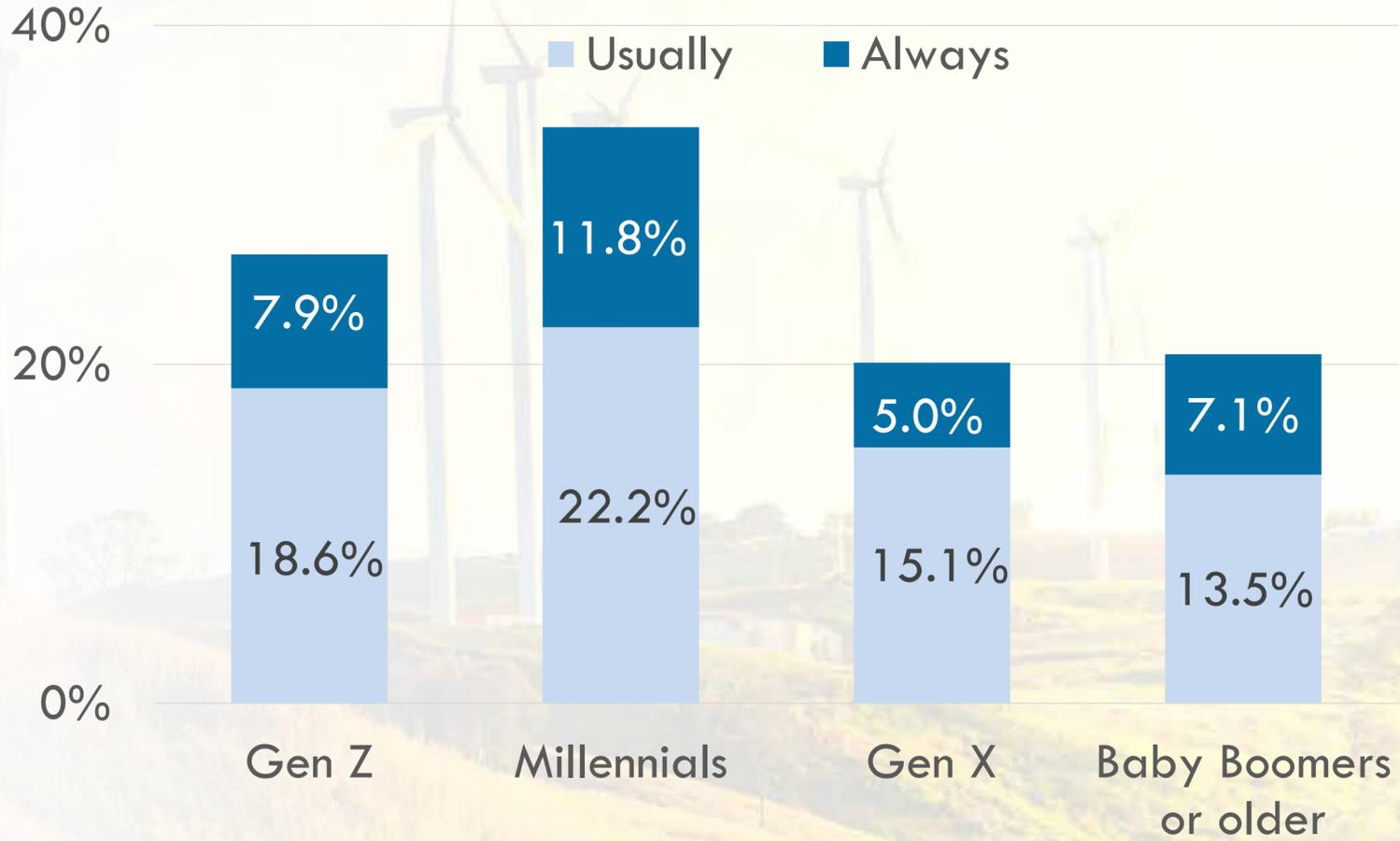
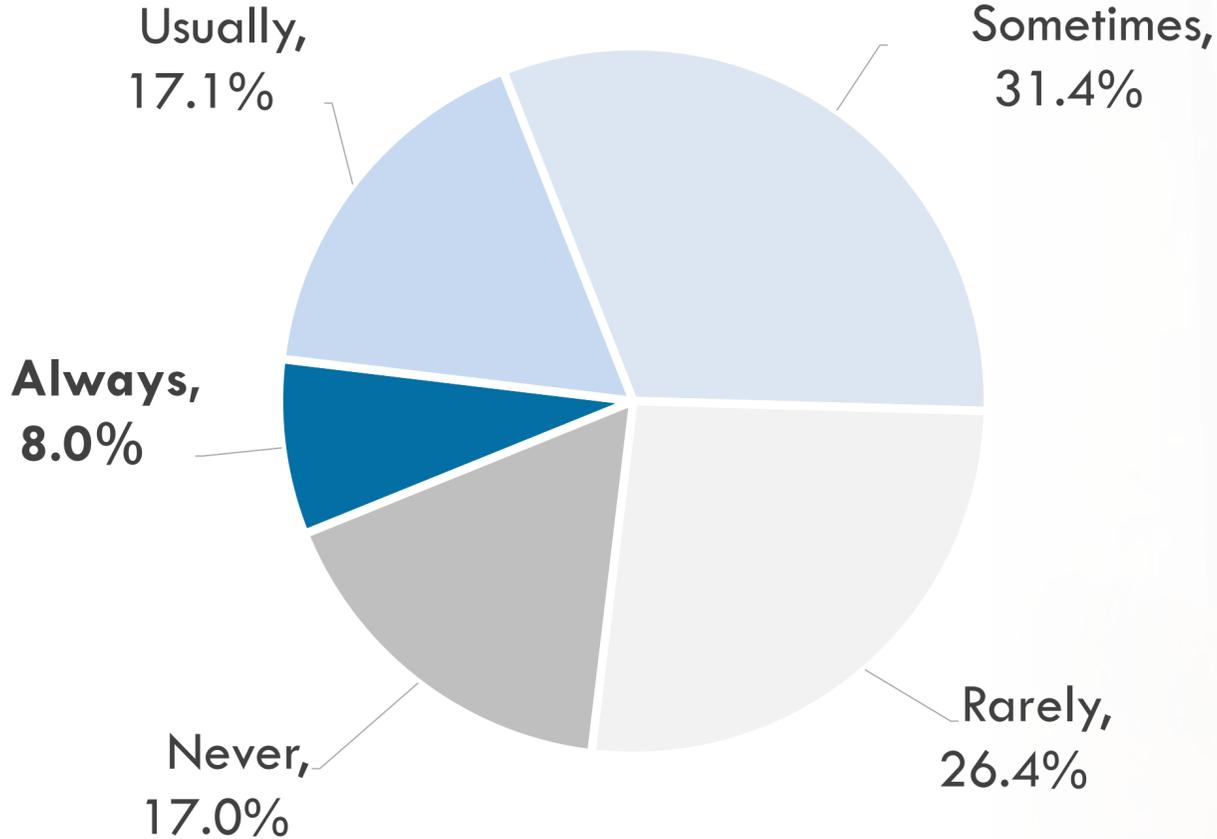
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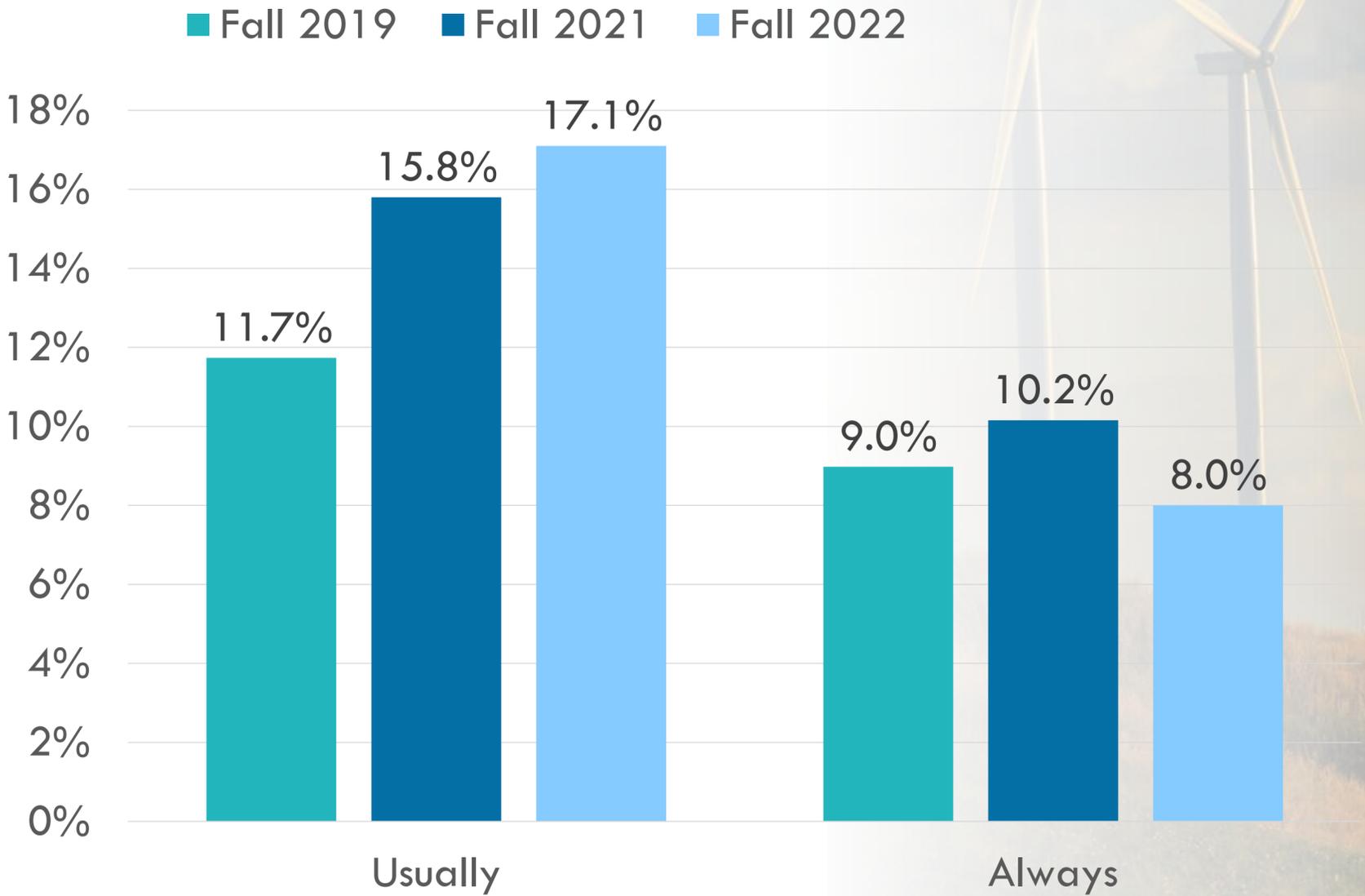
# CONSIDERING THE ENVIRONMENT WHEN PLANNING TRAVEL

## BY GENERATION



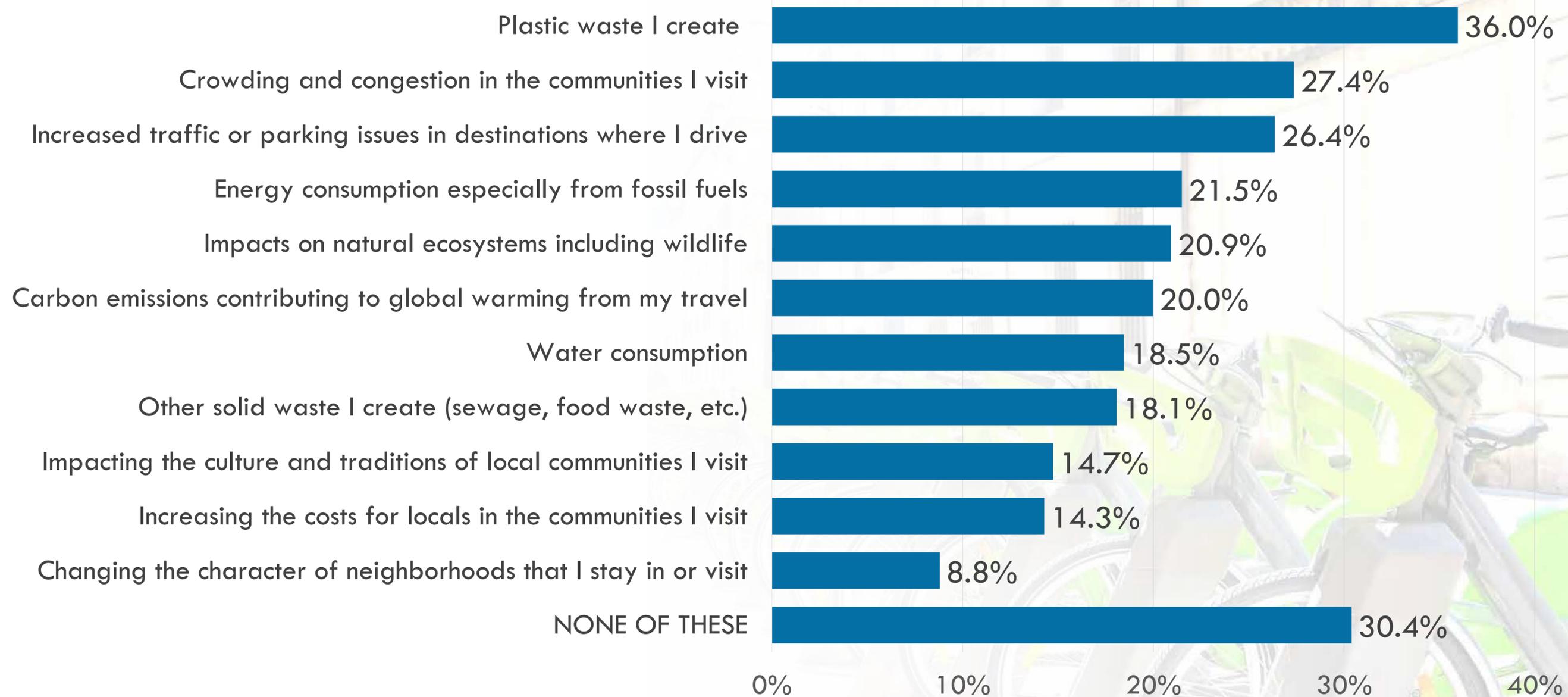
**Question:** When planning your trips, how often do you think about the impacts on the environment of your travels?

# CONSIDERING THE ENVIRONMENT WHEN PLANNING TRAVEL



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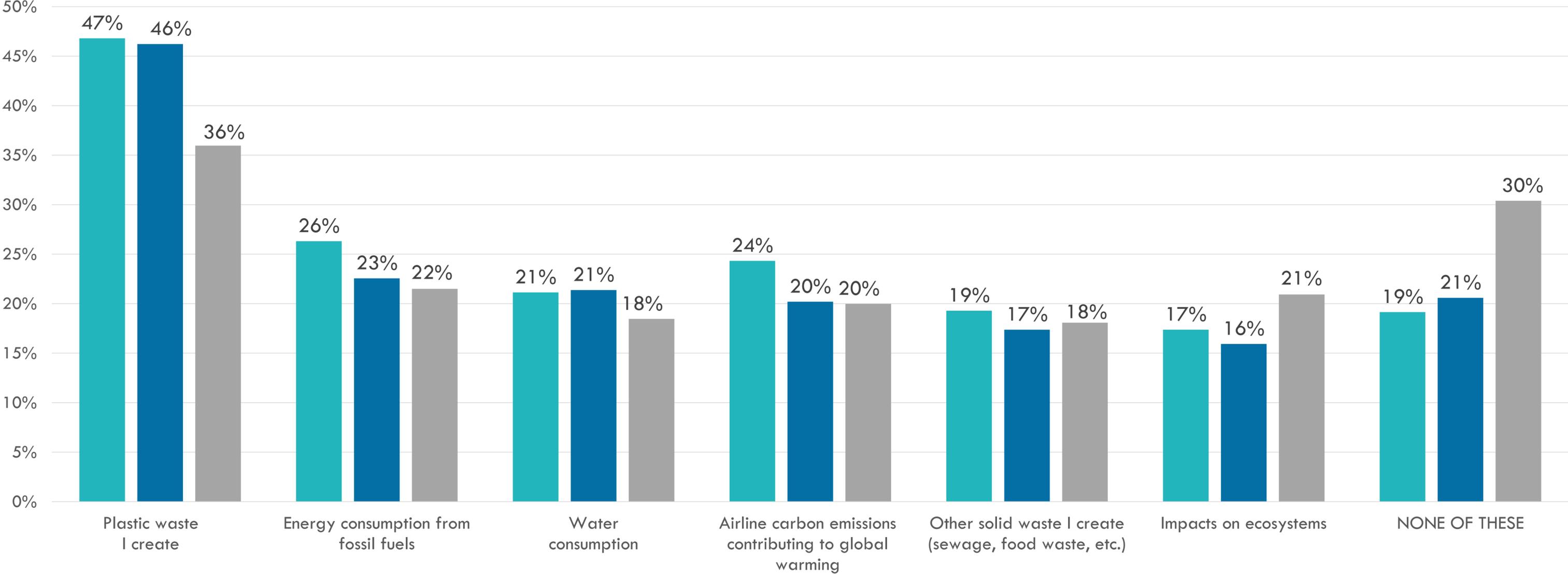
# ASPECTS OF ENVIRONMENTAL IMPACT CONSIDERED



**Question:** When traveling, what aspects of your environmental impact do you typically think about?

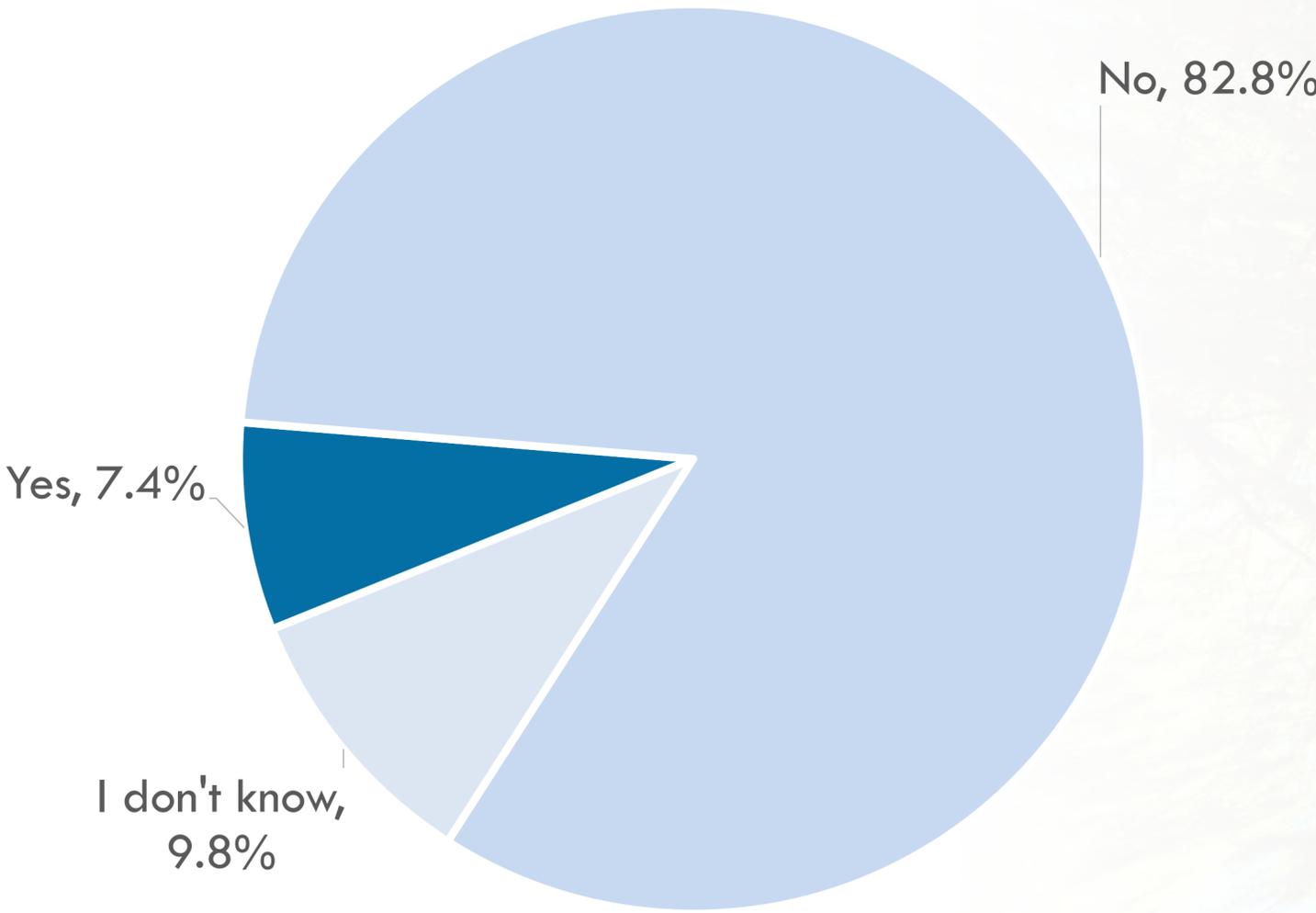
# ENVIRONMENTAL ISSUES EXPERIENCED WHILE TRAVELING IN THE U.S. IN THE PAST 12 MONTHS

Fall 2019   Fall 2021   Fall 2022

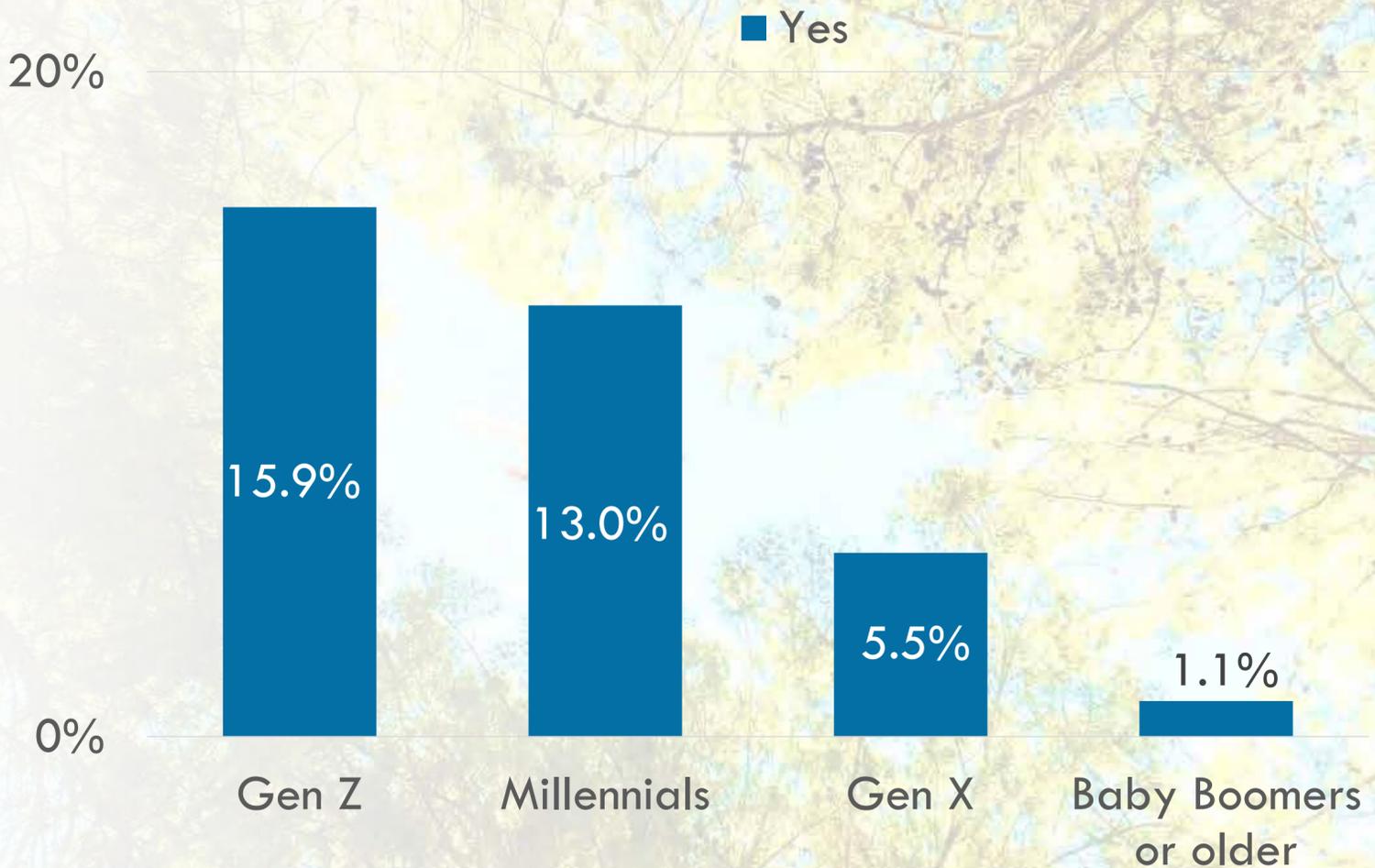


**Statement:** A carbon offset in travel is a payment made to offset or compensate for the emissions of greenhouse gases created by your trip – for example, from your air travel. Carbon offsets might restore forests or wetlands or expand renewable energy.

# CARBON OFFSETS PURCHASED IN THE PAST 12 MONTHS



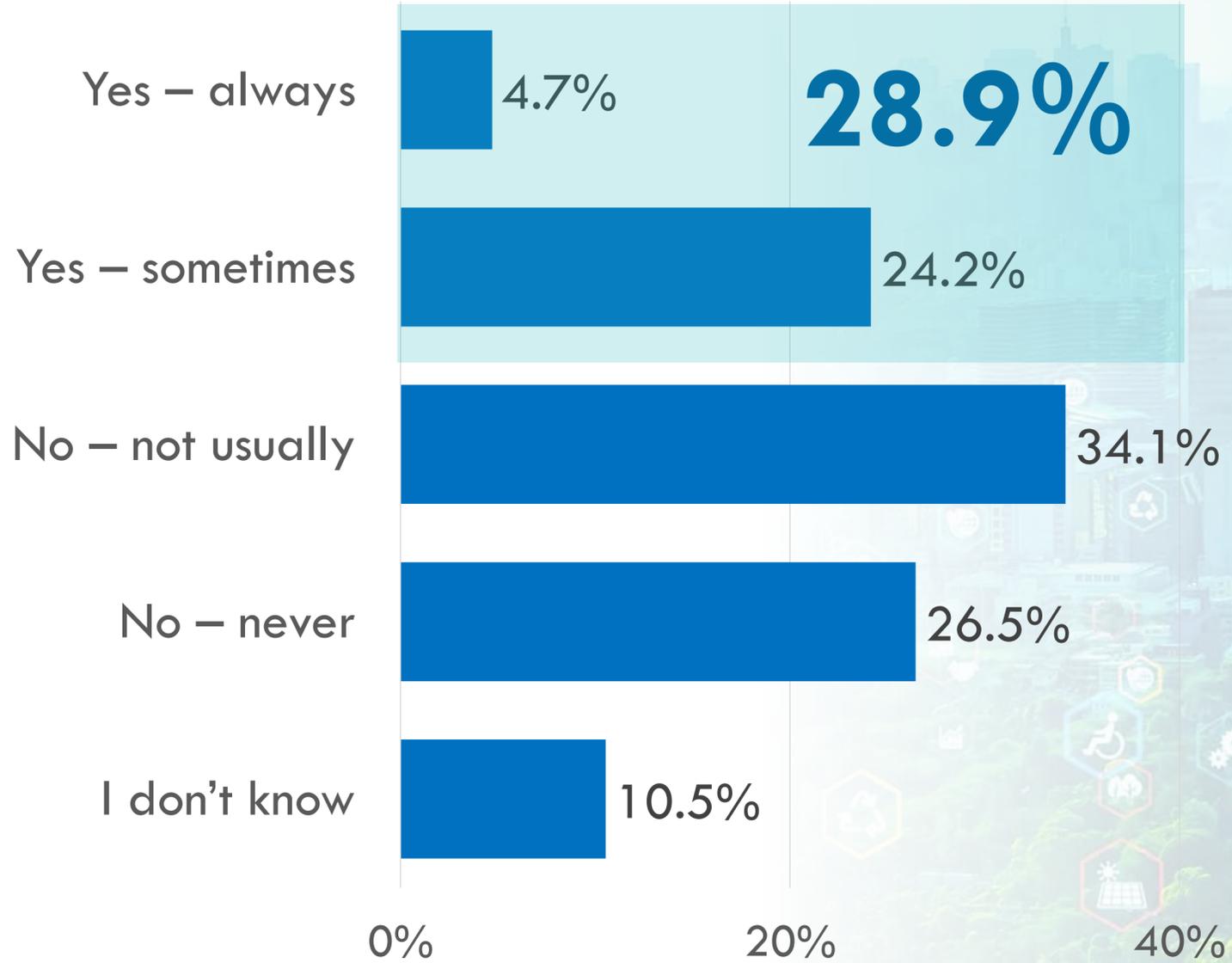
## BY GENERATION



**Question:** Have you purchased a “carbon offset” for your travels in the past 12 months? (Select one)

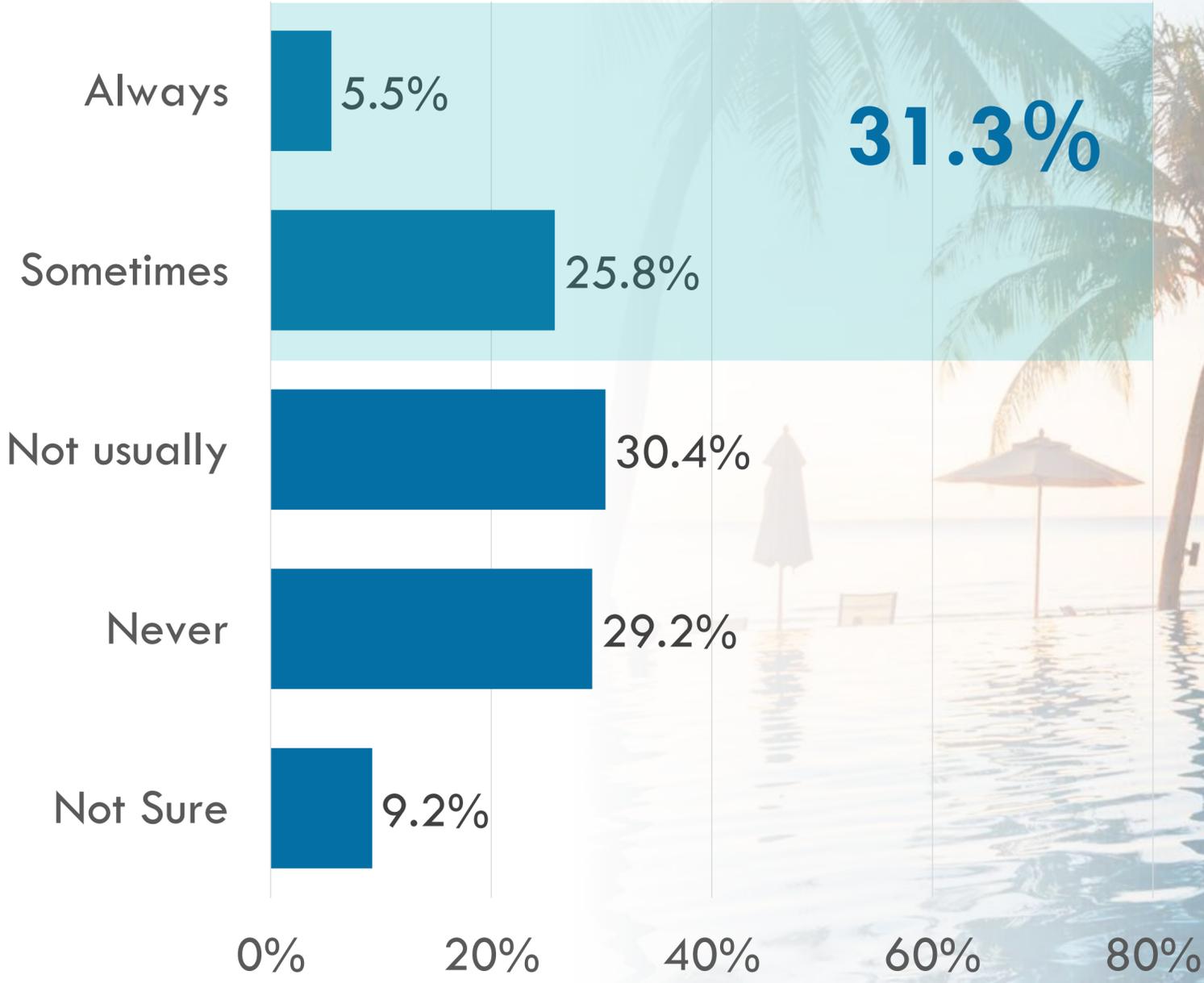
**Statement:** Many hotels now have “green” programs and certifications that show their commitment to reducing their environmental impact (e.g., recycling, water conservation, energy efficiency, use of renewable energy etc.).

# HOTEL GREEN PROGRAMS: CONSIDERATION



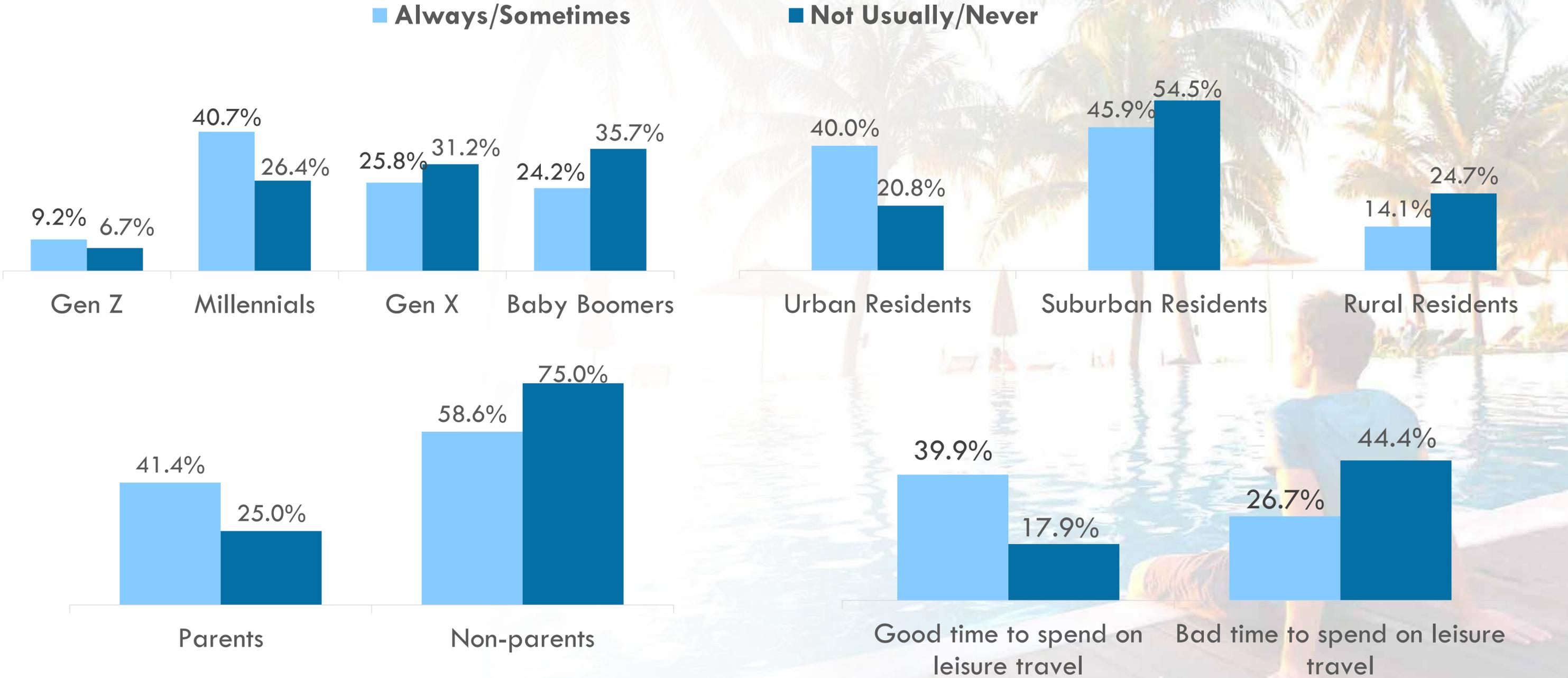
**Question:** When traveling, do you consciously look to stay in hotels that have “green” programs and certifications?

# HOTEL GREEN PROGRAMS: WILLINGNESS TO PAY



**Question:** How often would you pay slightly more (e.g., max. 10%) for staying at a hotel that has a strong “green” program/certification? (Select all that apply)

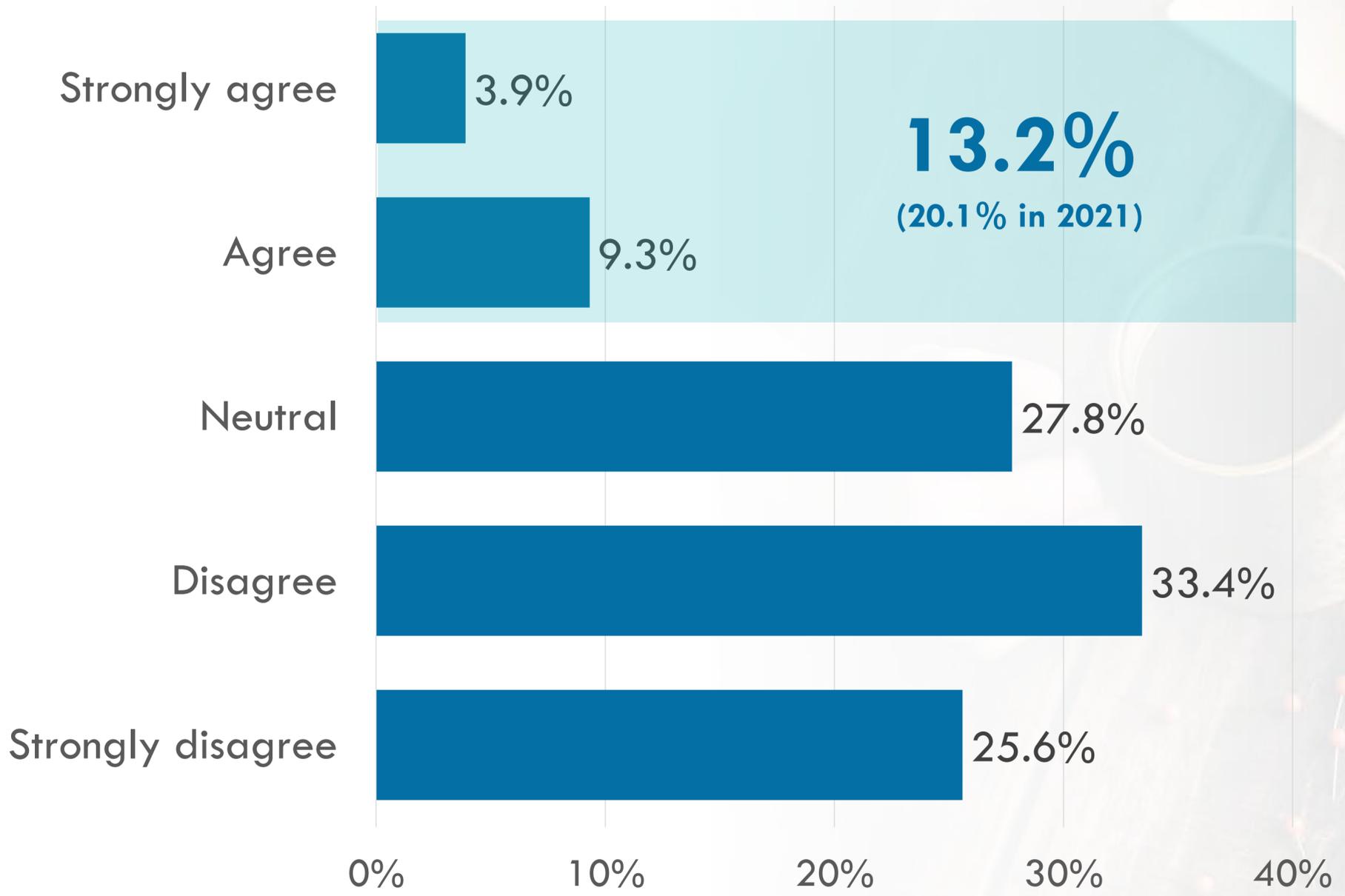
# HOTEL GREEN PROGRAMS: WHO IS WILLING TO PAY MORE



**Statement:** I believe that people generally SHOULD NOT TRAVEL LONG DISTANCES via air as it is bad for the environment.



# OPINIONS ON AIR TRAVEL AND THE ENVIRONMENT



**Question:** I believe that people generally SHOULD NOT TRAVEL LONG DISTANCES via air as it is bad for the environment. (Select one)

- **ENVIRONMENTAL CONCERNS**

- **CLIMATE CHANGE**

- **COMMUNITIES AND THE IMPACT OF OVER-TOURISM**



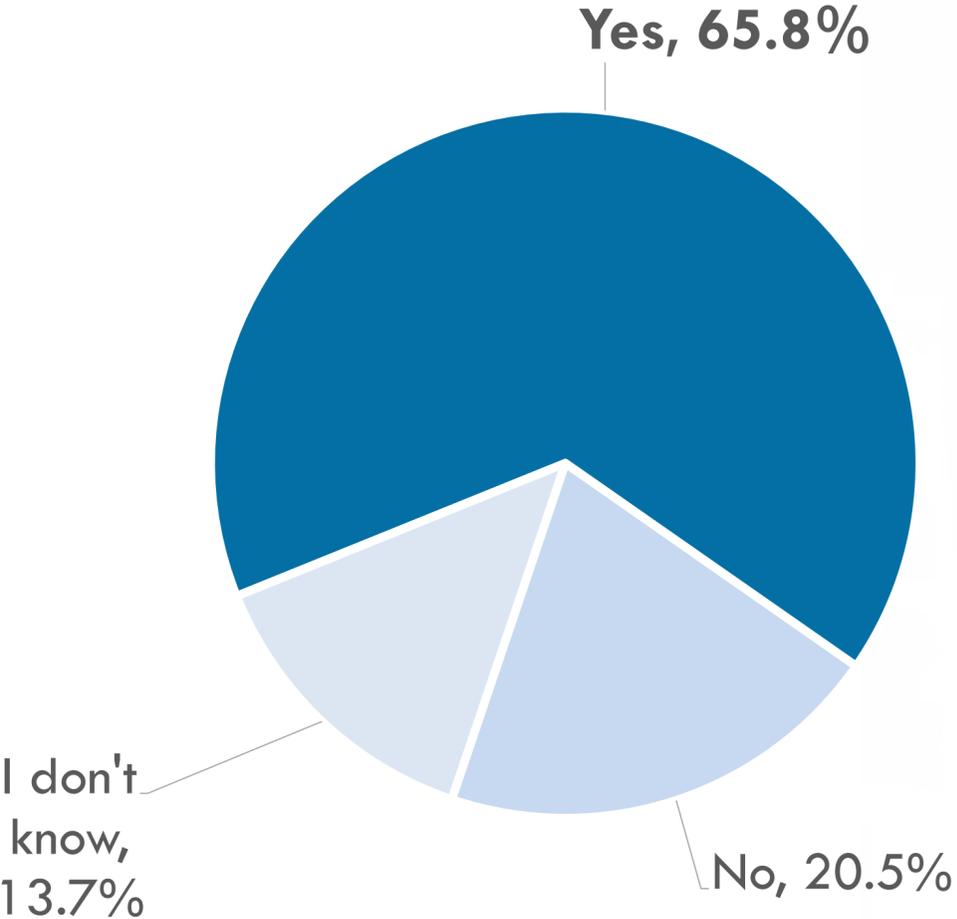
**Question:** Do you believe that human activity is responsible for climate change?

OUR HOUSE IS ON FIRE!!

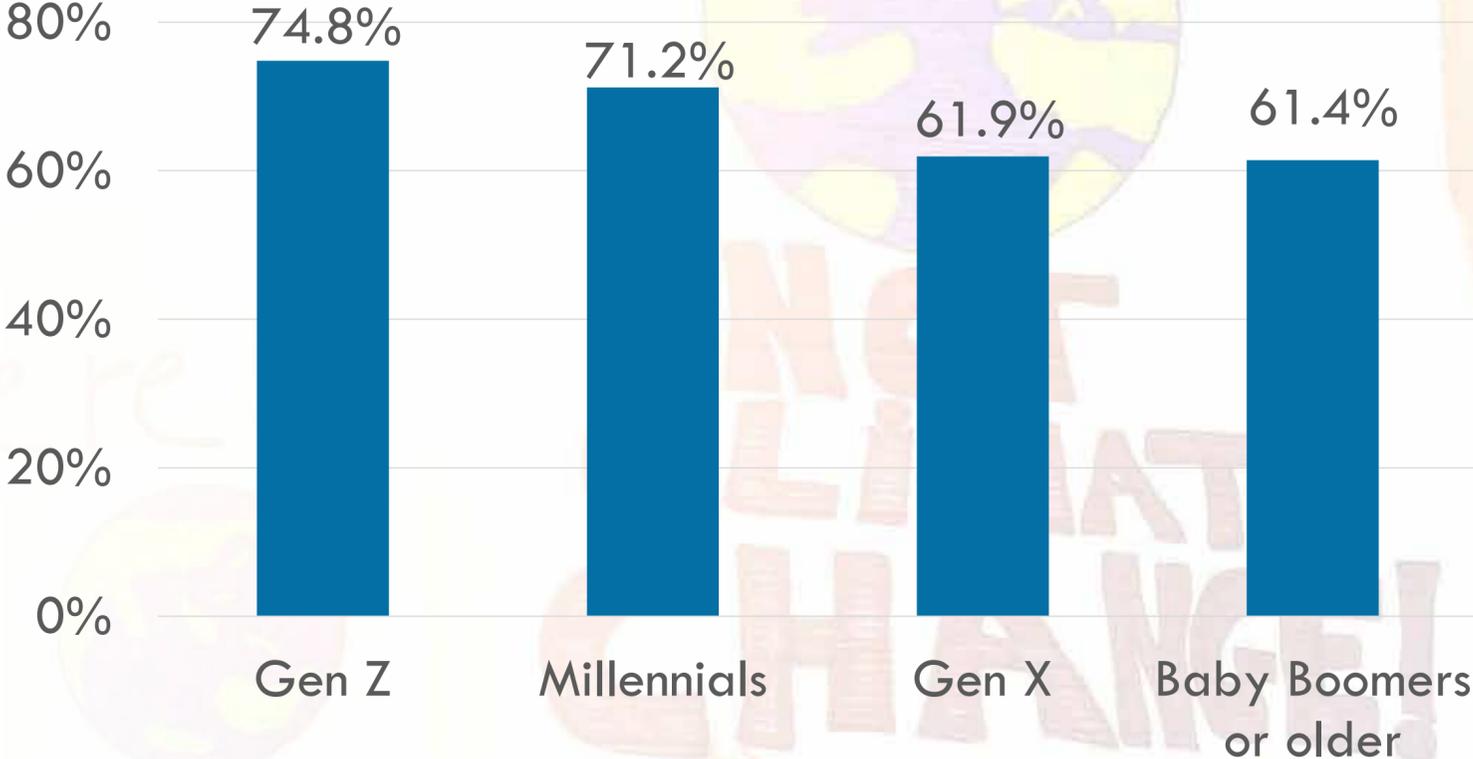
There is NO PLANET B

SYSTEM CHANGE NOT CLIMATE CHANGE

# IS HUMAN ACTIVITY RESPONSIBLE FOR CLIMATE CHANGE?

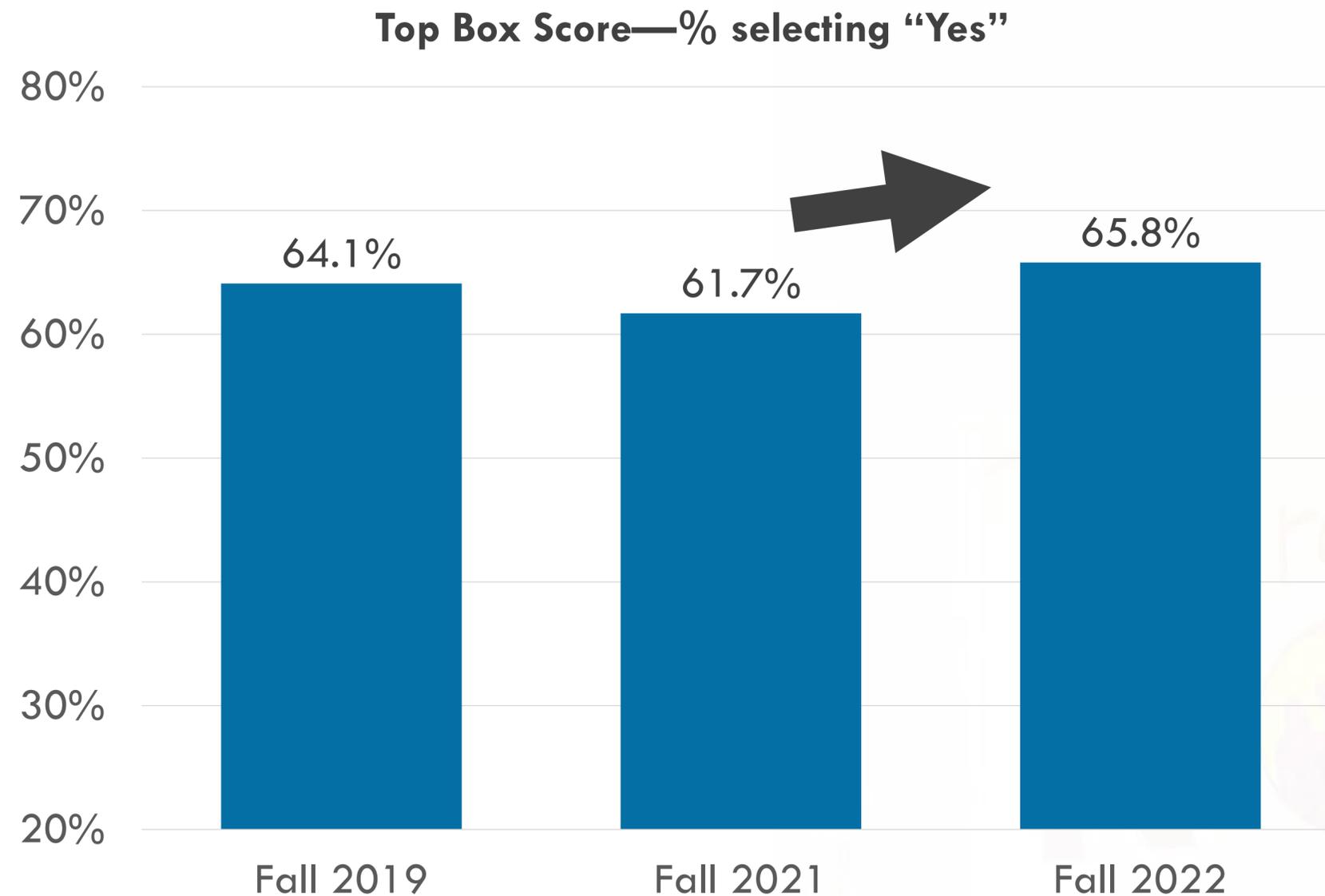


## BY GENERATION



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# IS HUMAN ACTIVITY RESPONSIBLE FOR CLIMATE CHANGE?



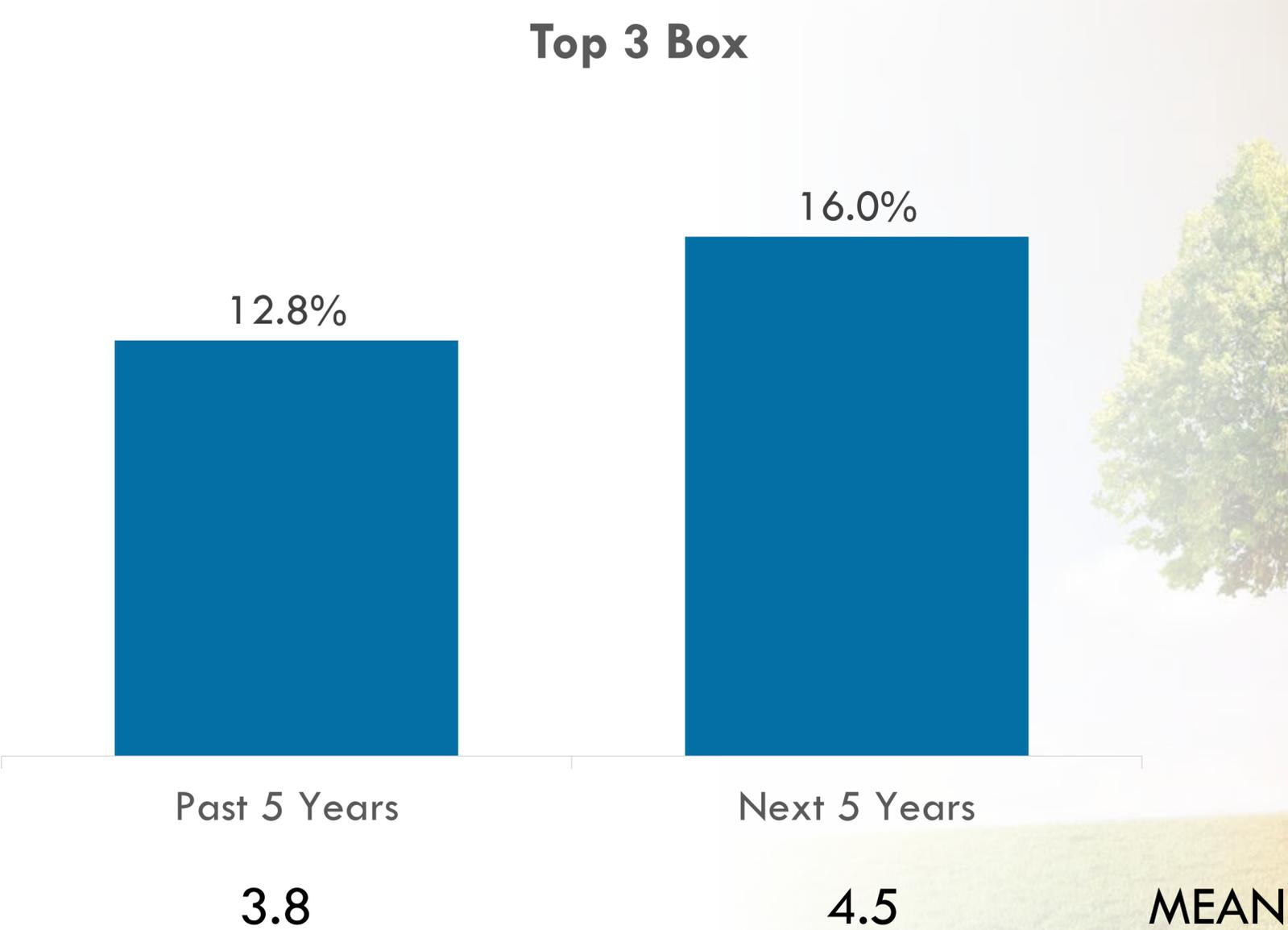
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\*1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022

# CLIMATE CHANGE IMPACTING TRAVEL (PAST & FUTURE)

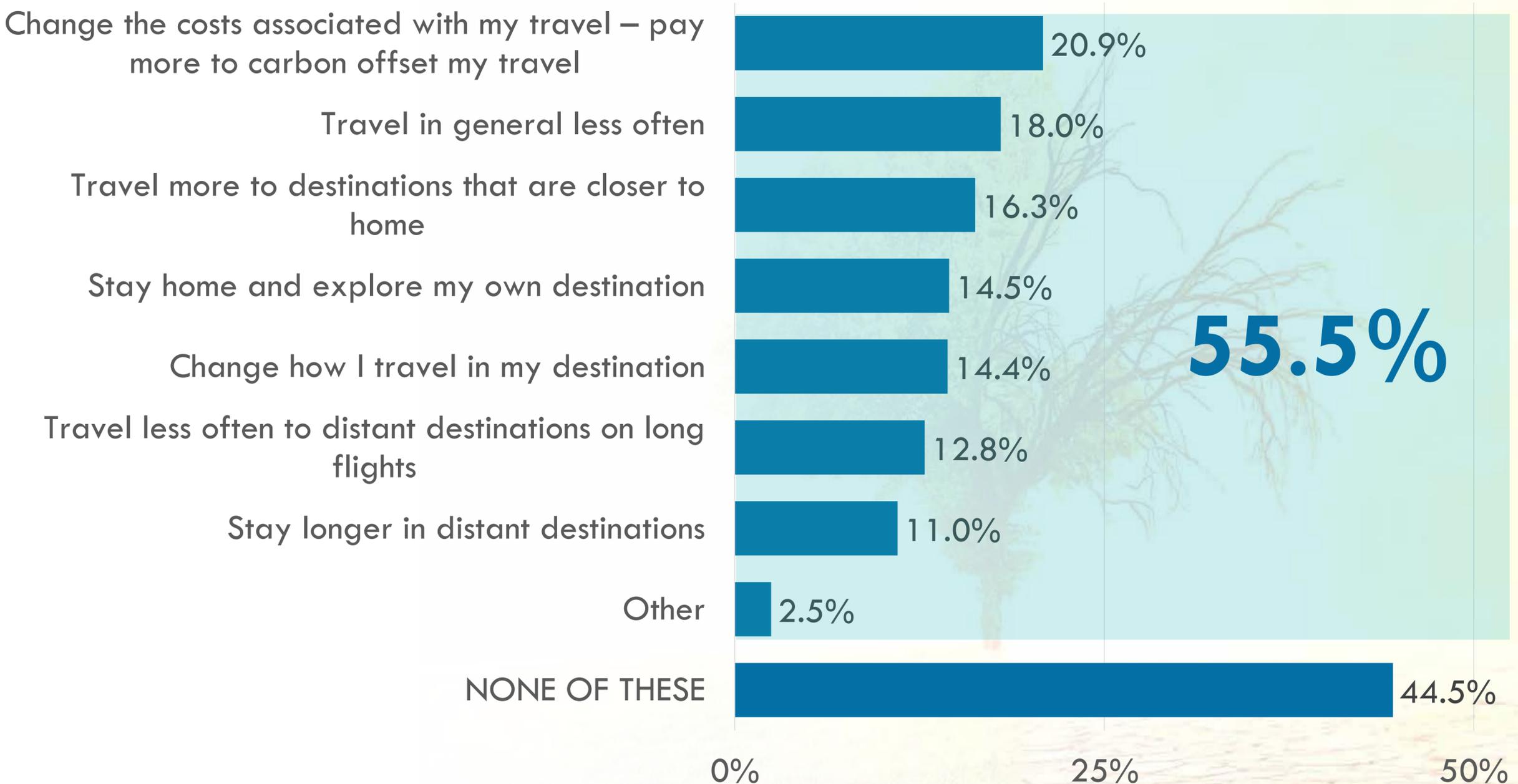
## Top 3 Box



**Question:** In the PAST FIVE (5) YEARS and the NEXT FIVE (5) YEARS, please rate on a scale of 1 to 10, how much you think climate change has or will impact your leisure travel?

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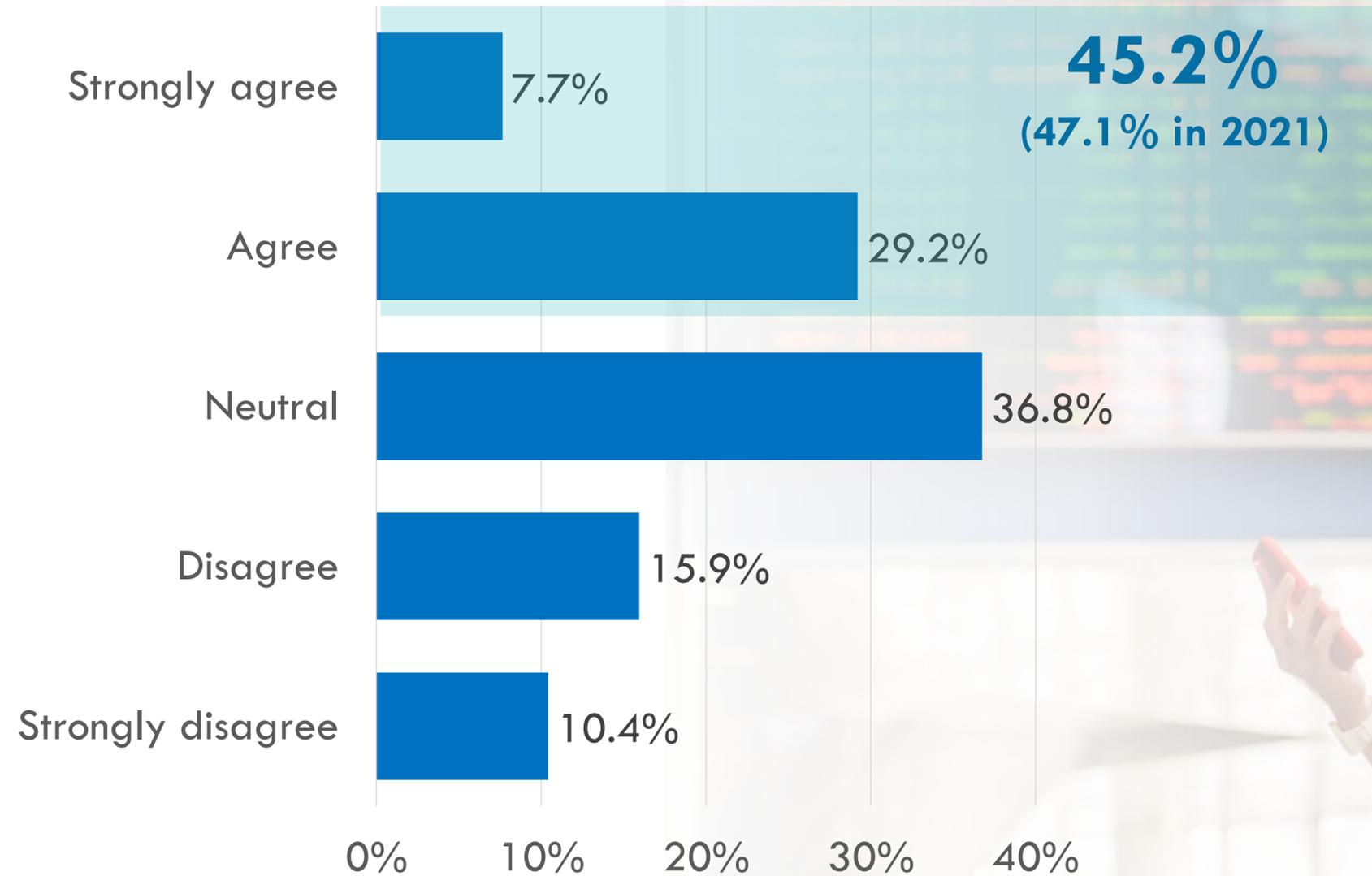
# CLIMATE CHANGE IMPACT ON FUTURE TRAVEL



**Question:** In the next 5 years, I anticipate concern about climate change will impact my travel in the following ways. (Select all that apply)

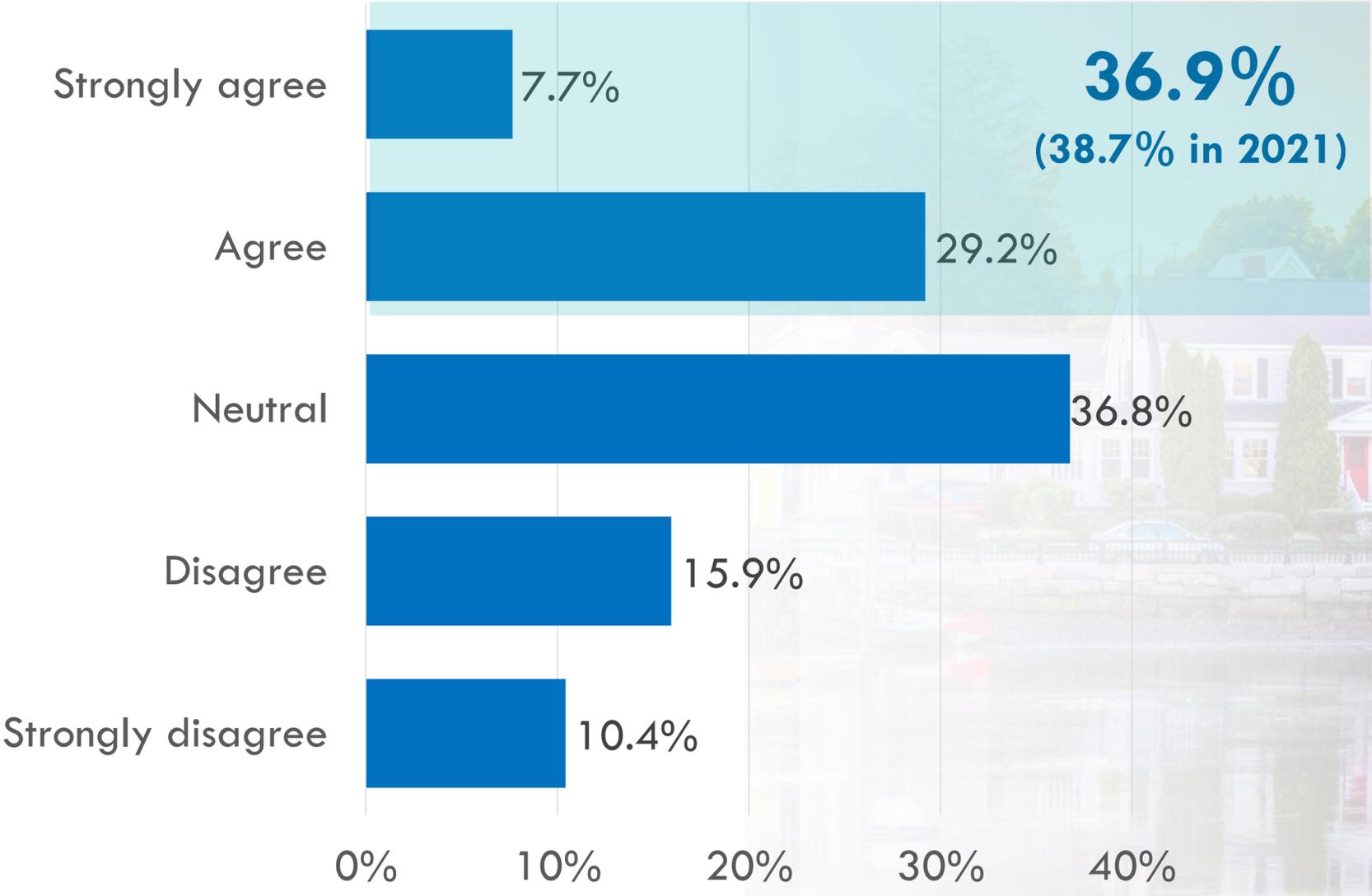
- **ENVIRONMENTAL CONCERNS**
- **CLIMATE CHANGE**
- **COMMUNITIES AND THE IMPACT OF OVER-TOURISM**

# “I LIVE IN A COMMUNITY THAT IS A POPULAR TOURISM DESTINATION”



**Statement:** I live in a community that is a popular tourism destination.

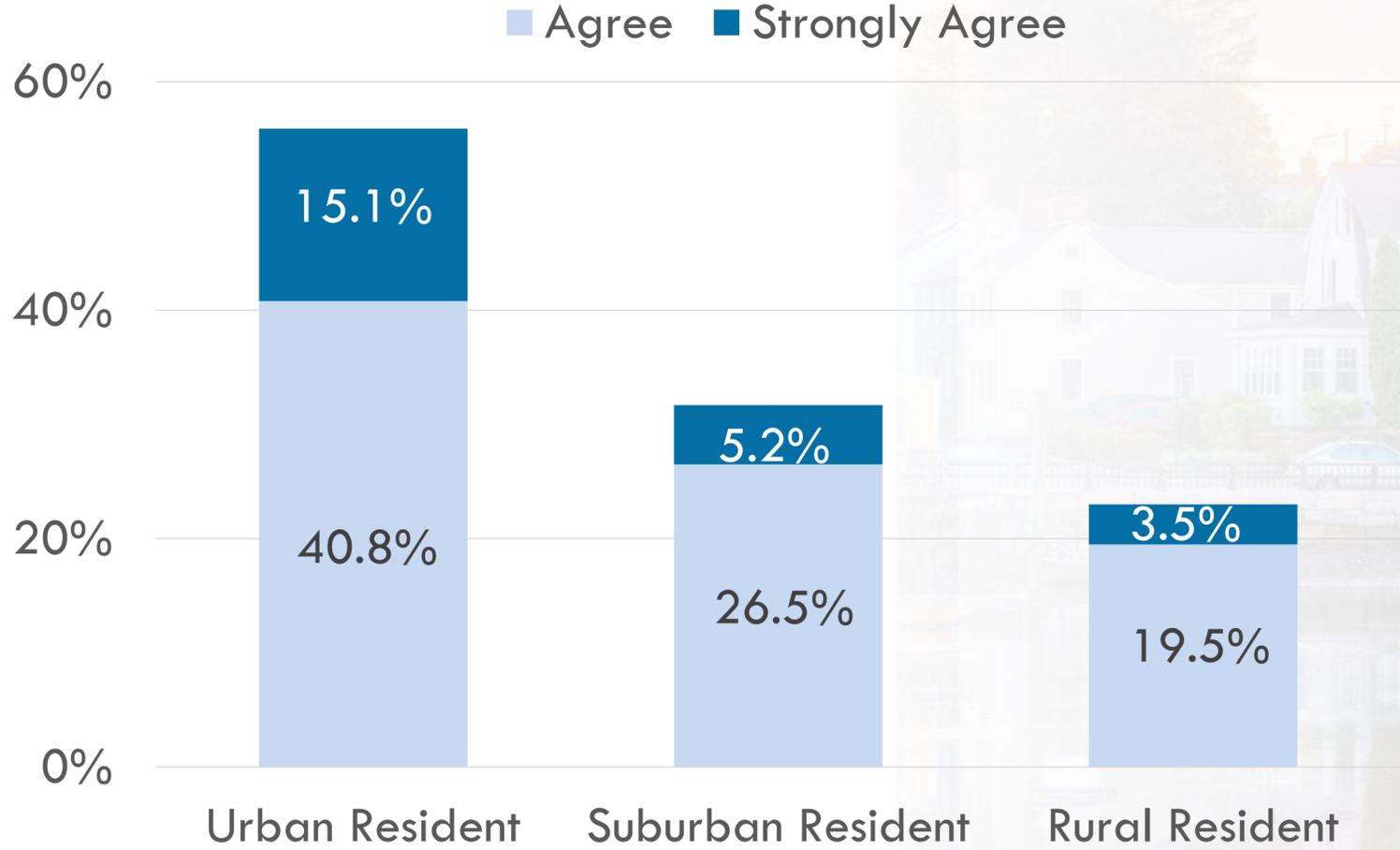
# “TOURISM IN MY COMMUNITY MAKES IT A BETTER PLACE IN WHICH TO LIVE”



**Statement:** Tourism in my community makes it a better place in which to live.

# “TOURISM IN MY COMMUNITY MAKES IT A BETTER PLACE IN WHICH TO LIVE”

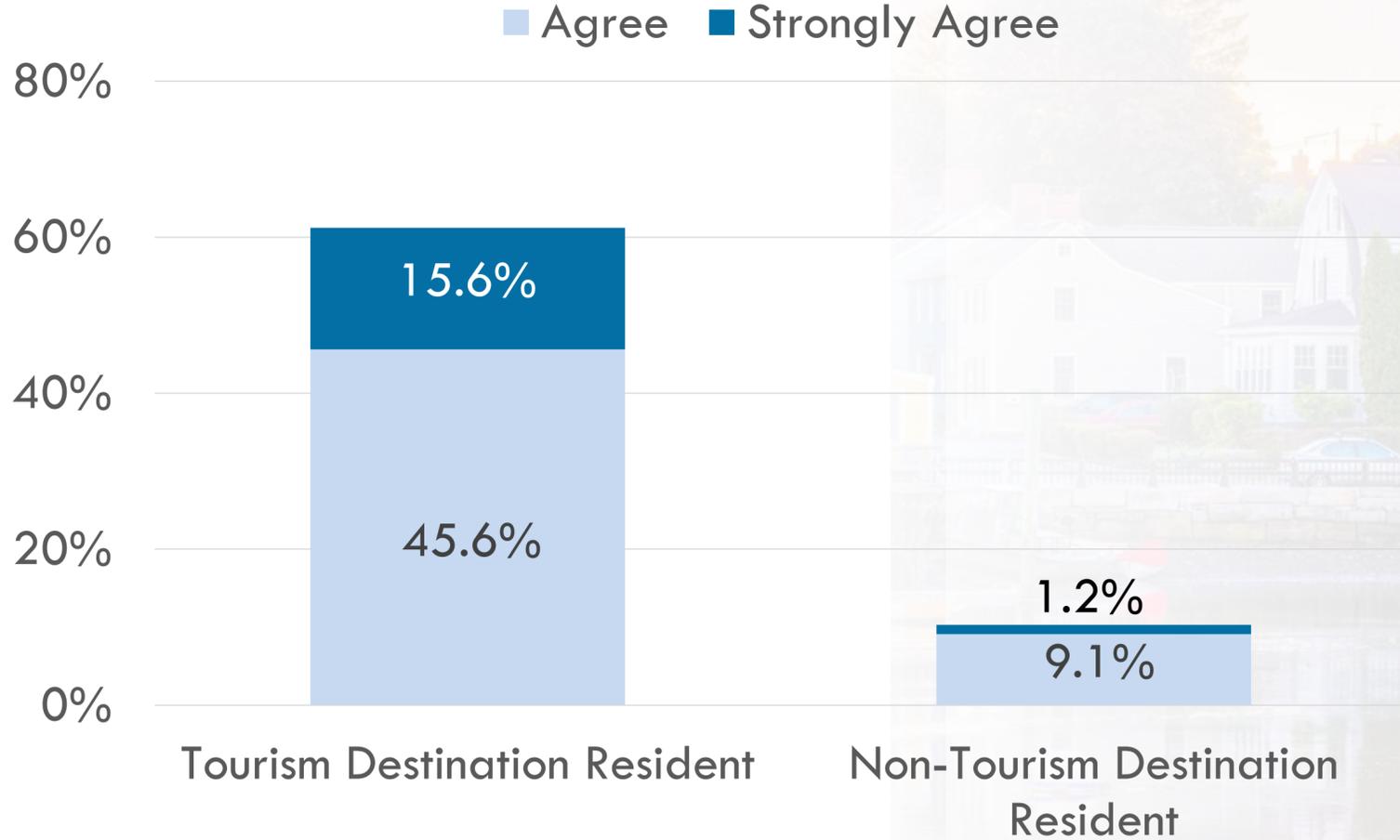
## BY AREA OF RESIDENCE



**Statement:** Tourism in my community makes it a better place in which to live.

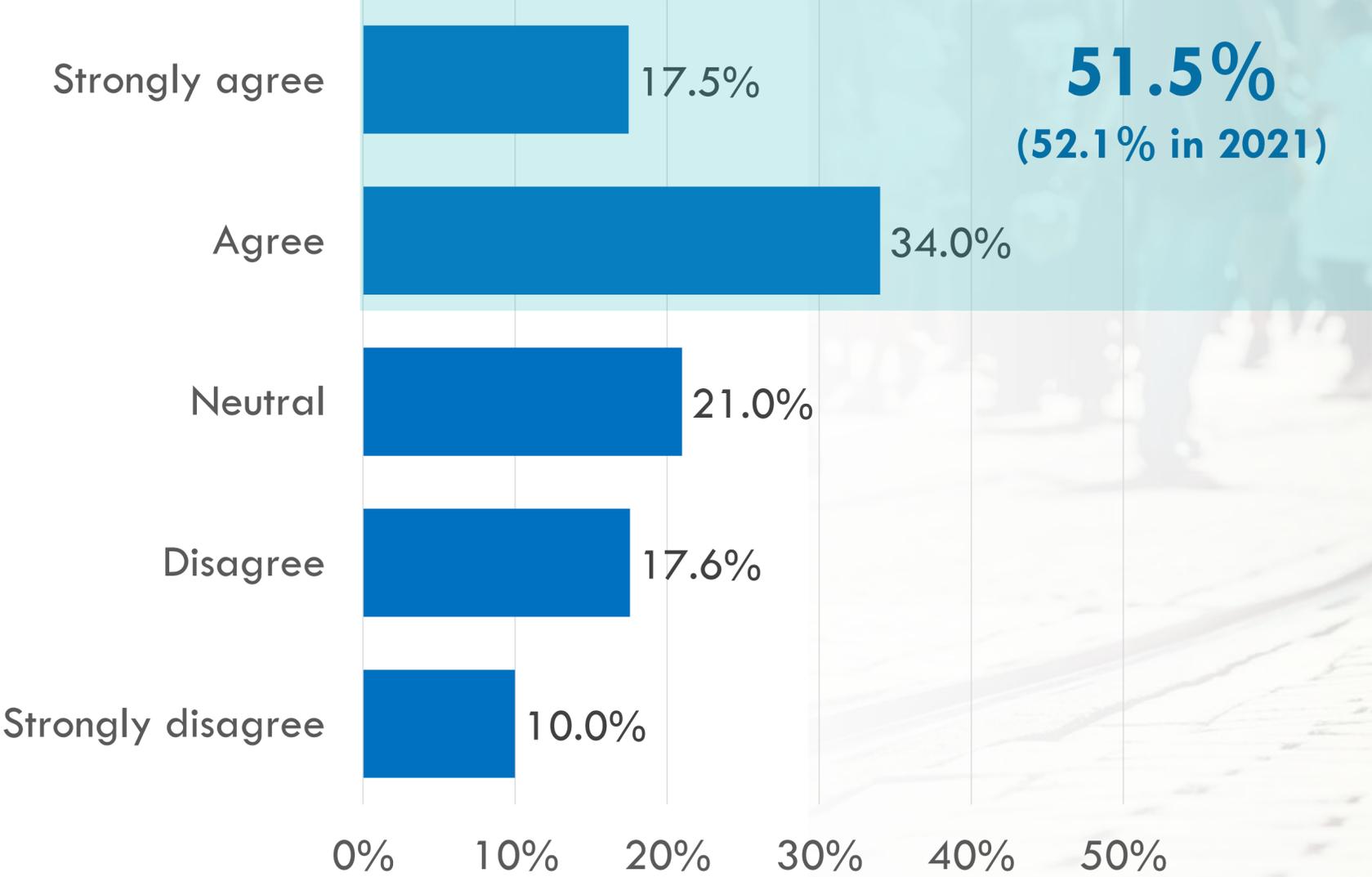
# “TOURISM IN MY COMMUNITY MAKES IT A BETTER PLACE IN WHICH TO LIVE”

## BY RESIDENCE IN A TOURISM DESTINATION



**Statement:** Tourism in my community makes it a better place in which to live.

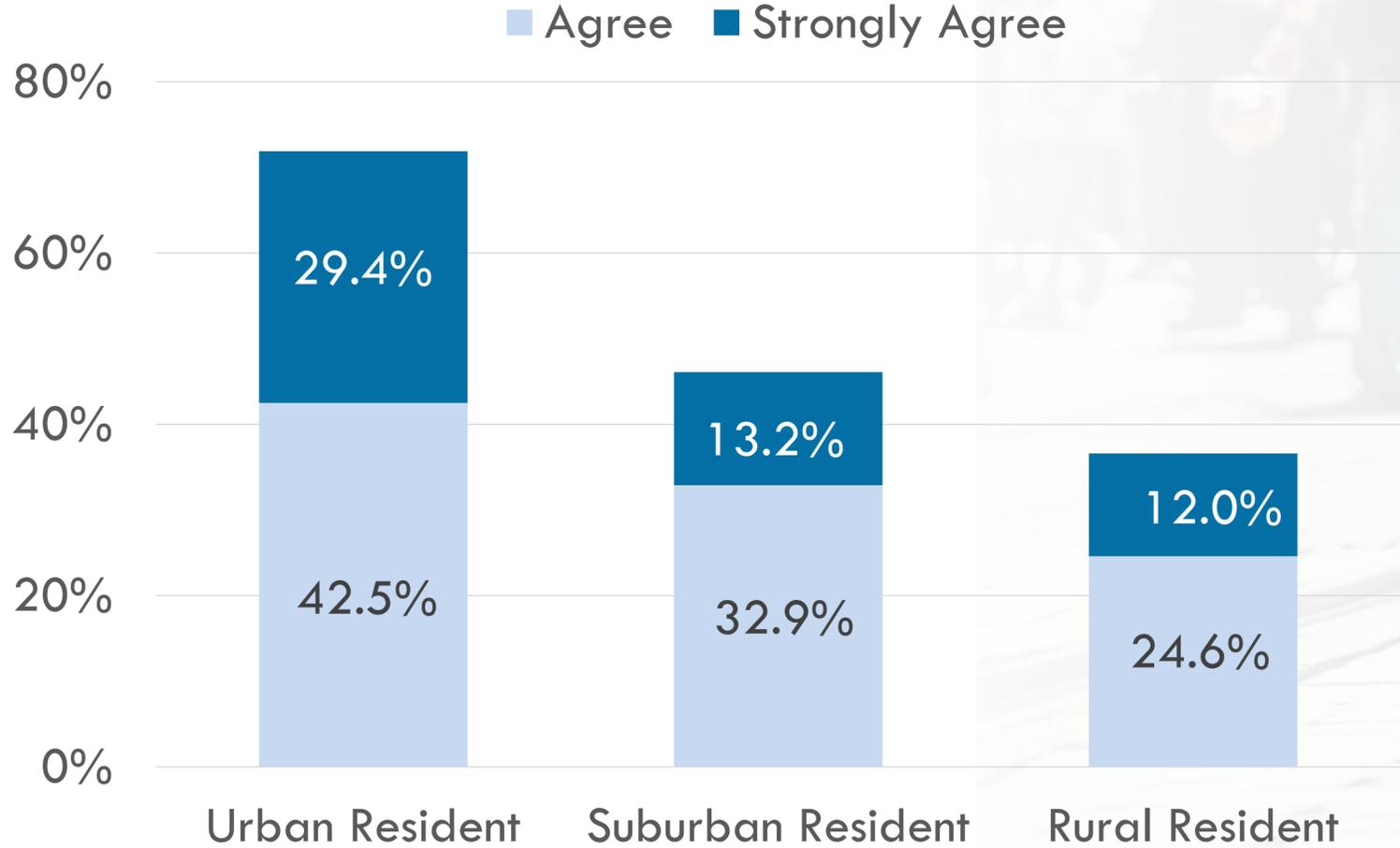
# “TOURISM IS IMPORTANT TO THE ECONOMY OF THE COMMUNITY IN WHICH I LIVE”



**Statement:** Tourism is important to the economy of the community in which I live.

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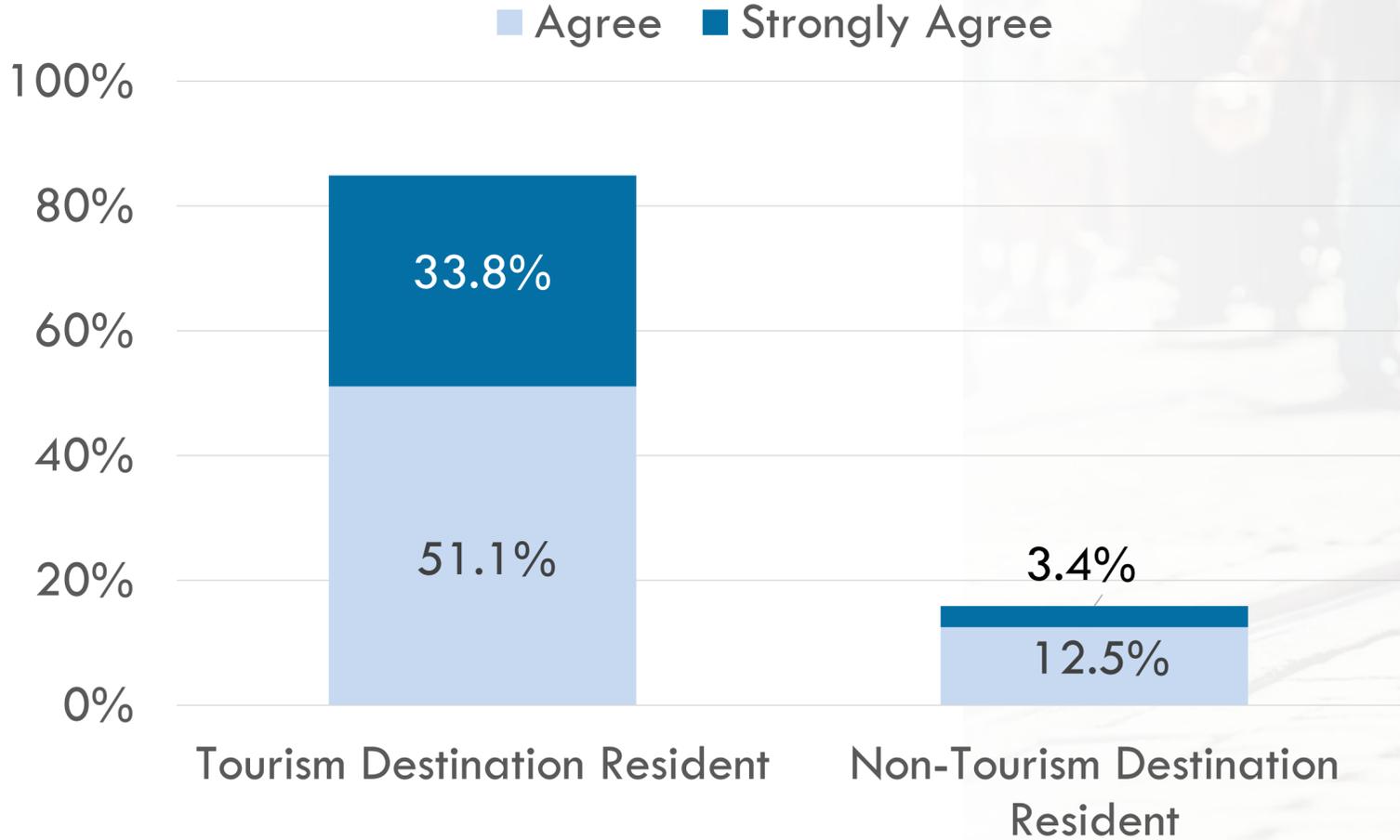
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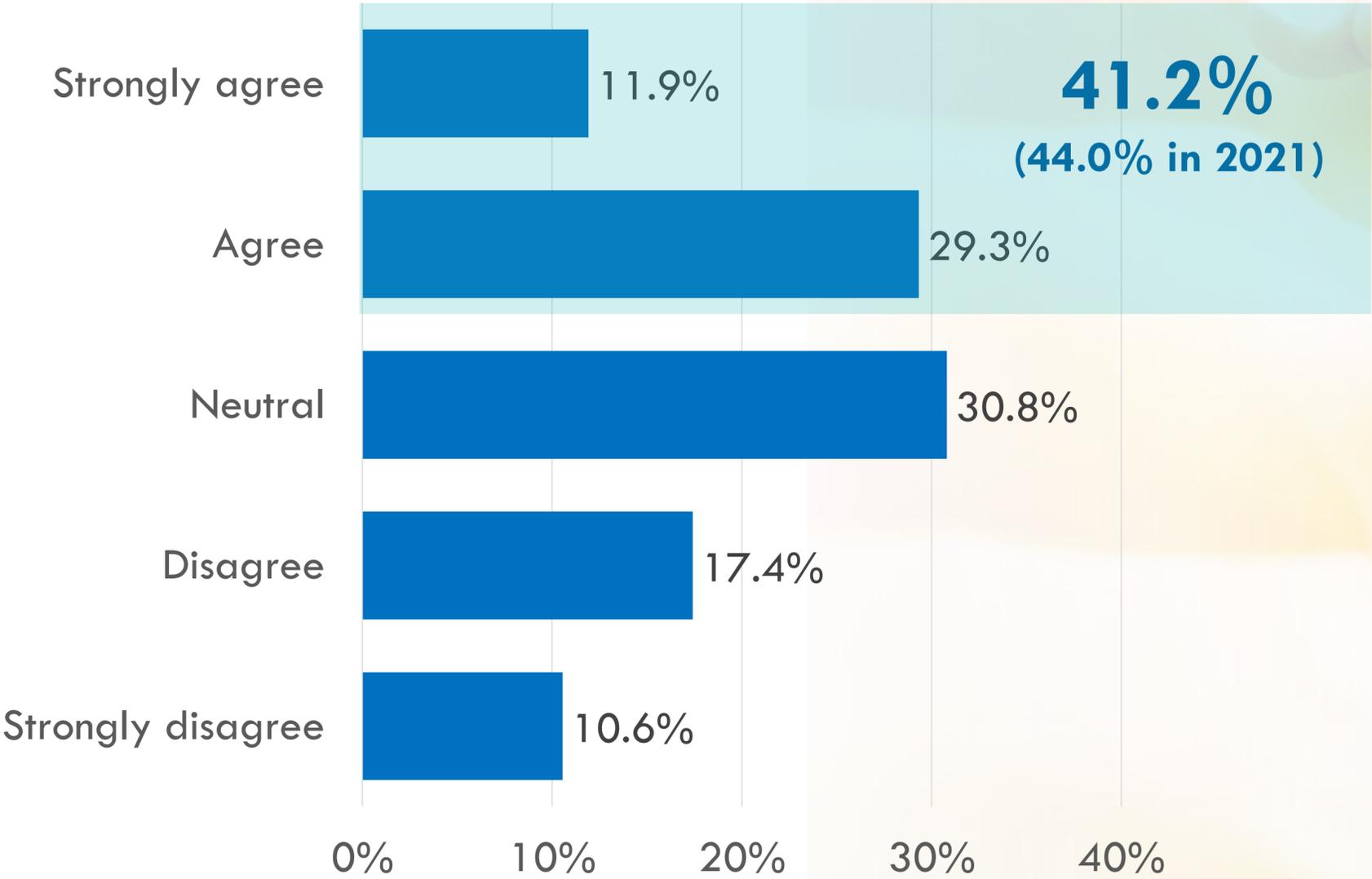
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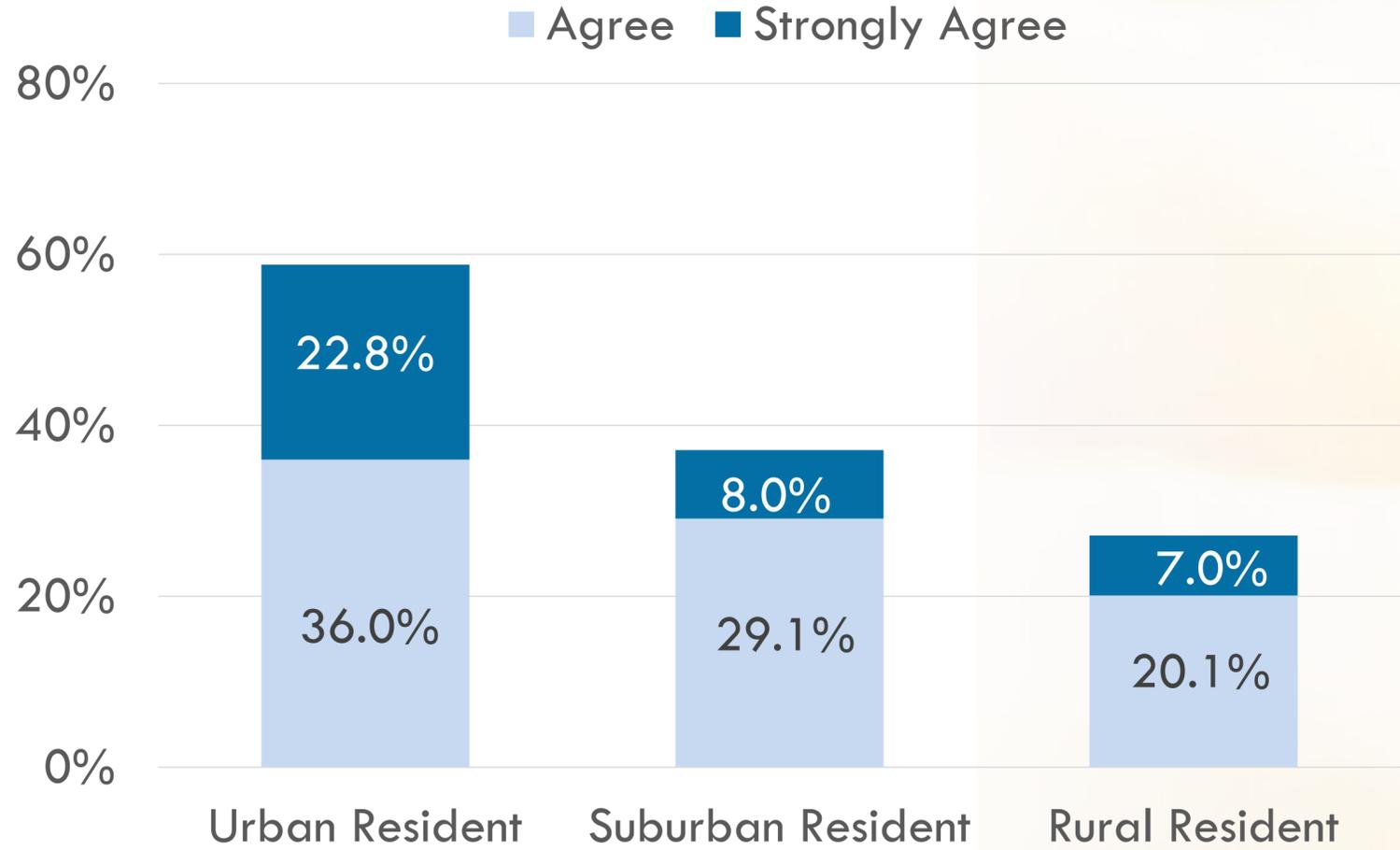
# “THE PANDEMIC HAS HIGHLIGHTED HOW IMPORTANT TOURISM IS TO MY COMMUNITY”



**Statement:** The pandemic has highlighted how important tourism is to my community. (Select one)

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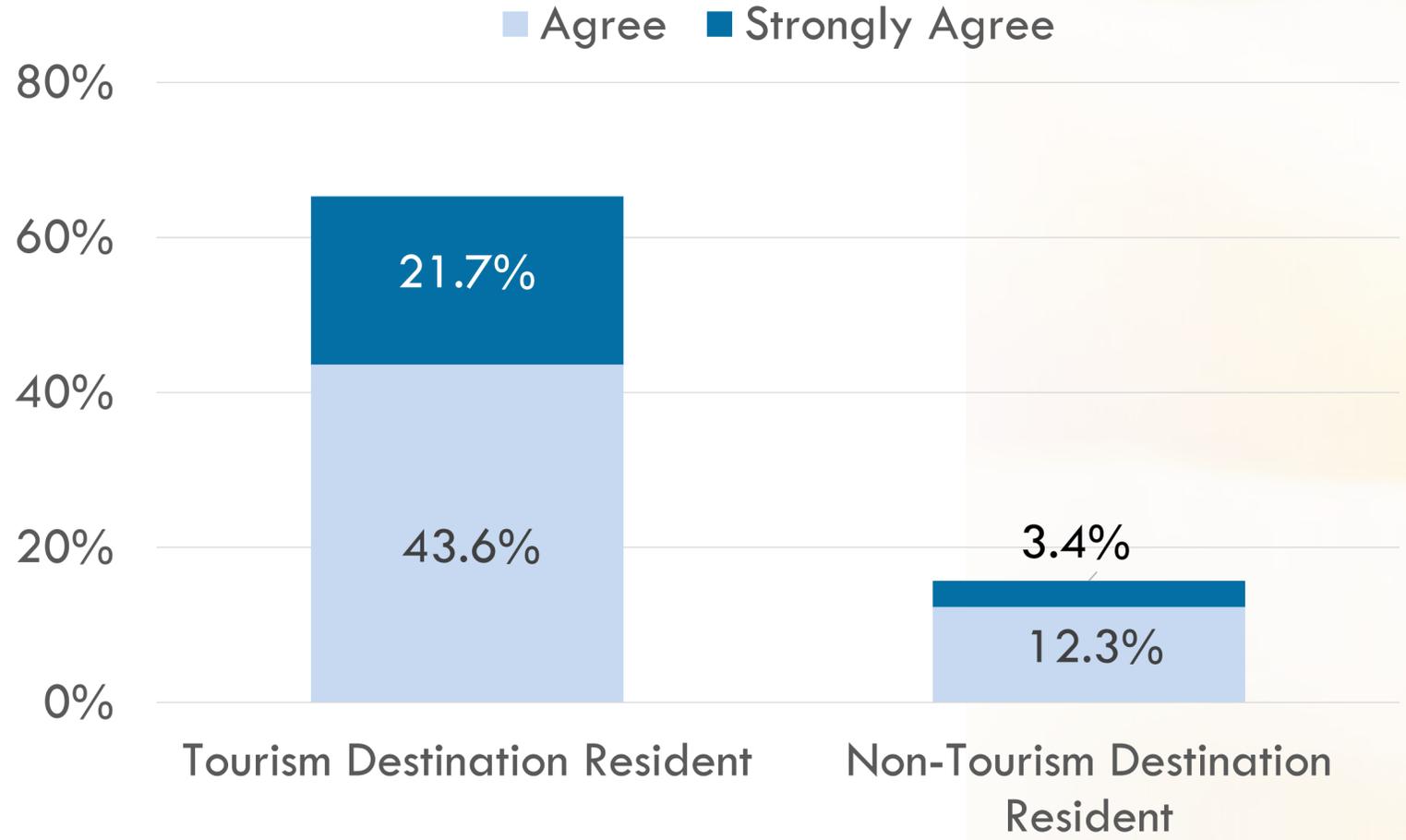
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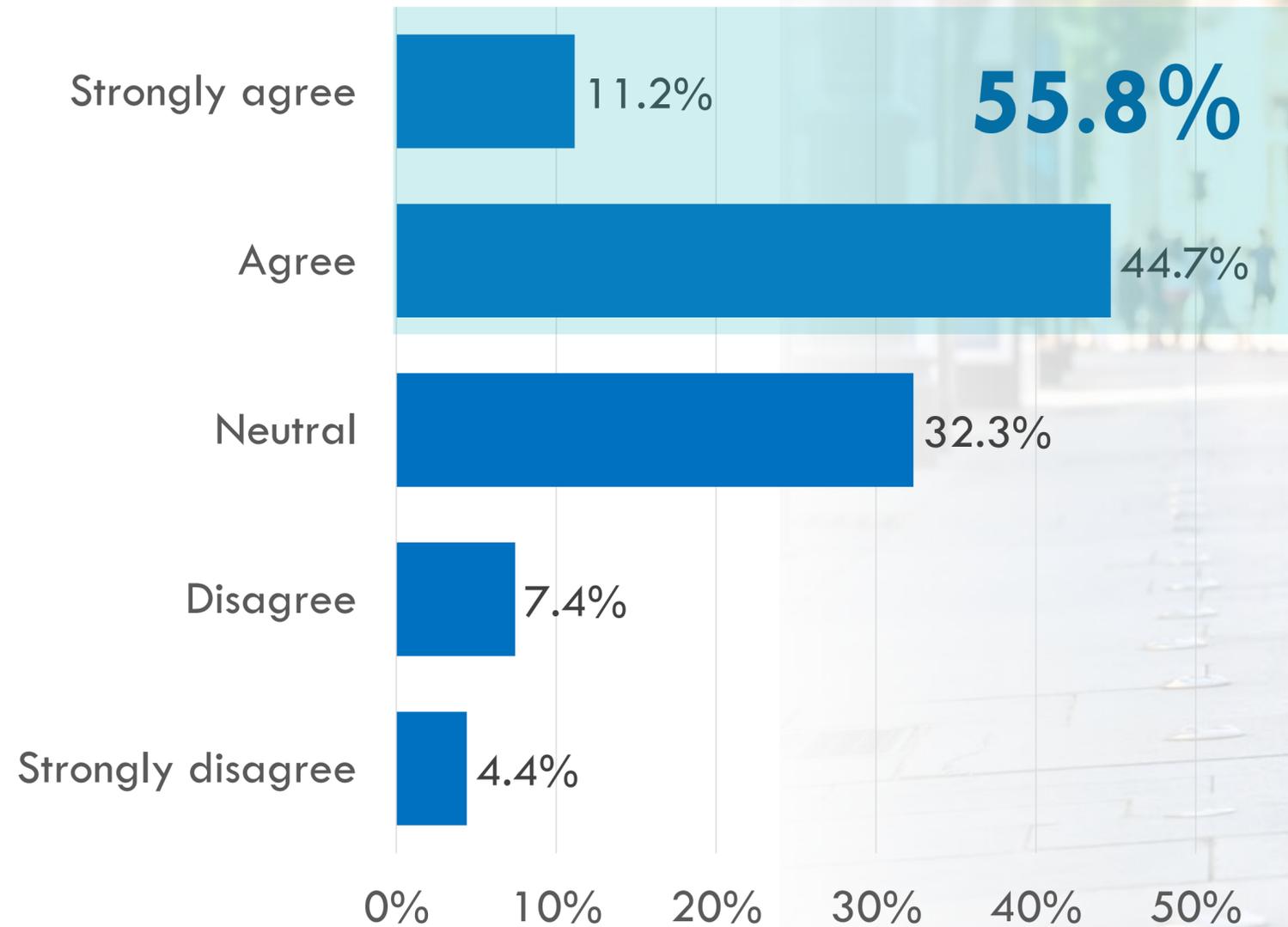
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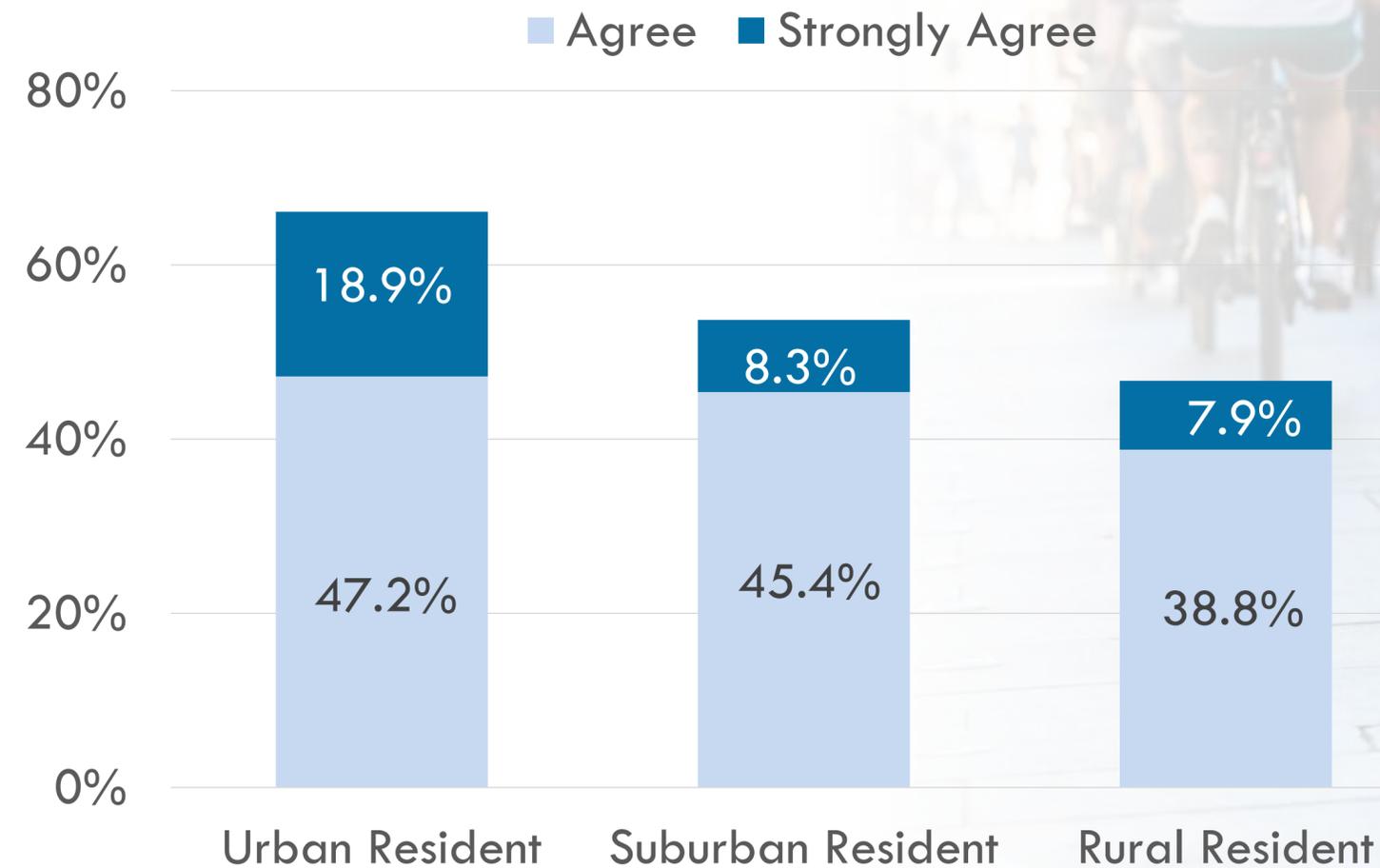
# “VISITORS TO WHERE I LIVE HAVE A MAINLY POSITIVE IMPACT ON MY COMMUNITY.”



**Statement:** Visitors to where I live have a mainly positive impact on my community.

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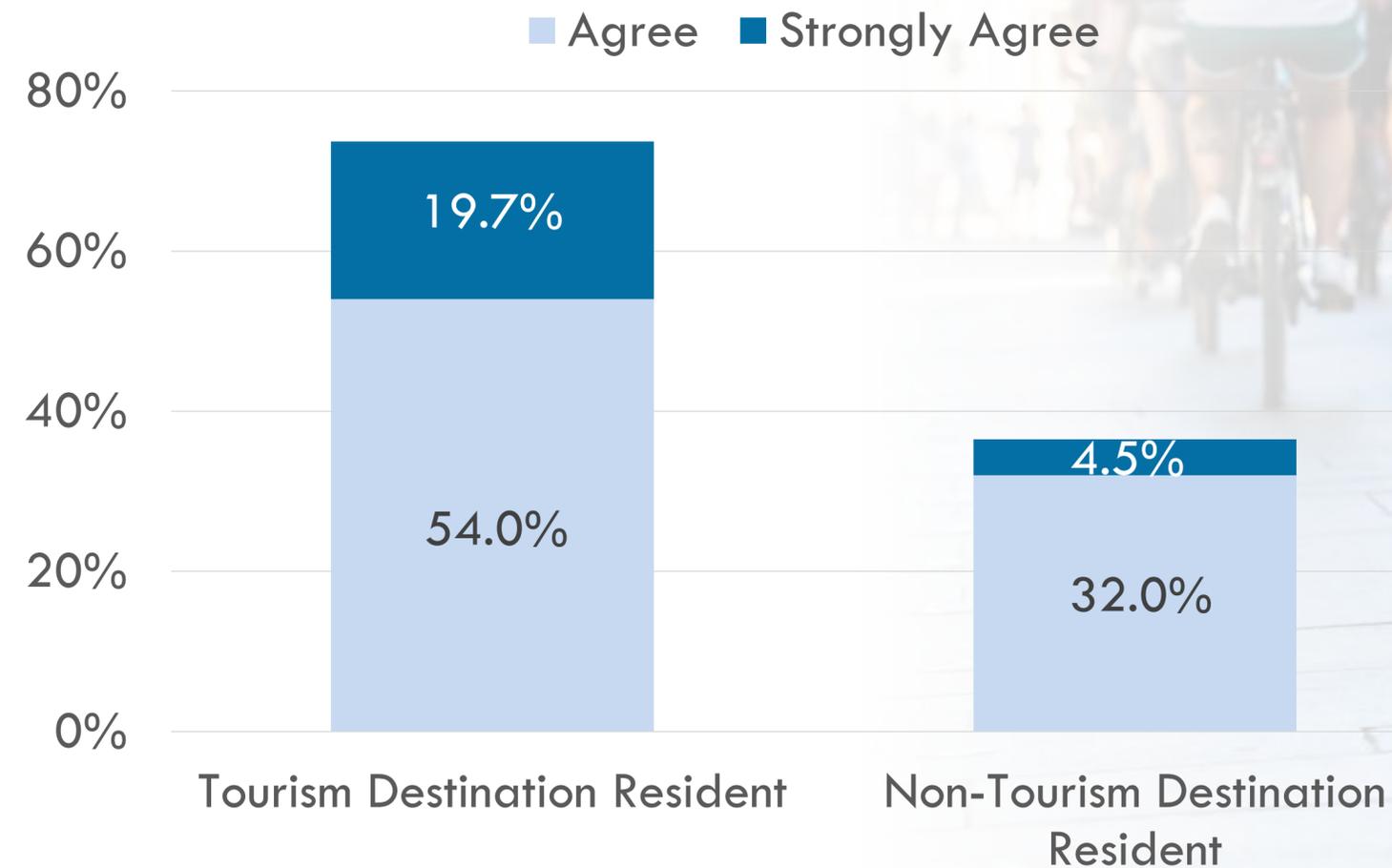
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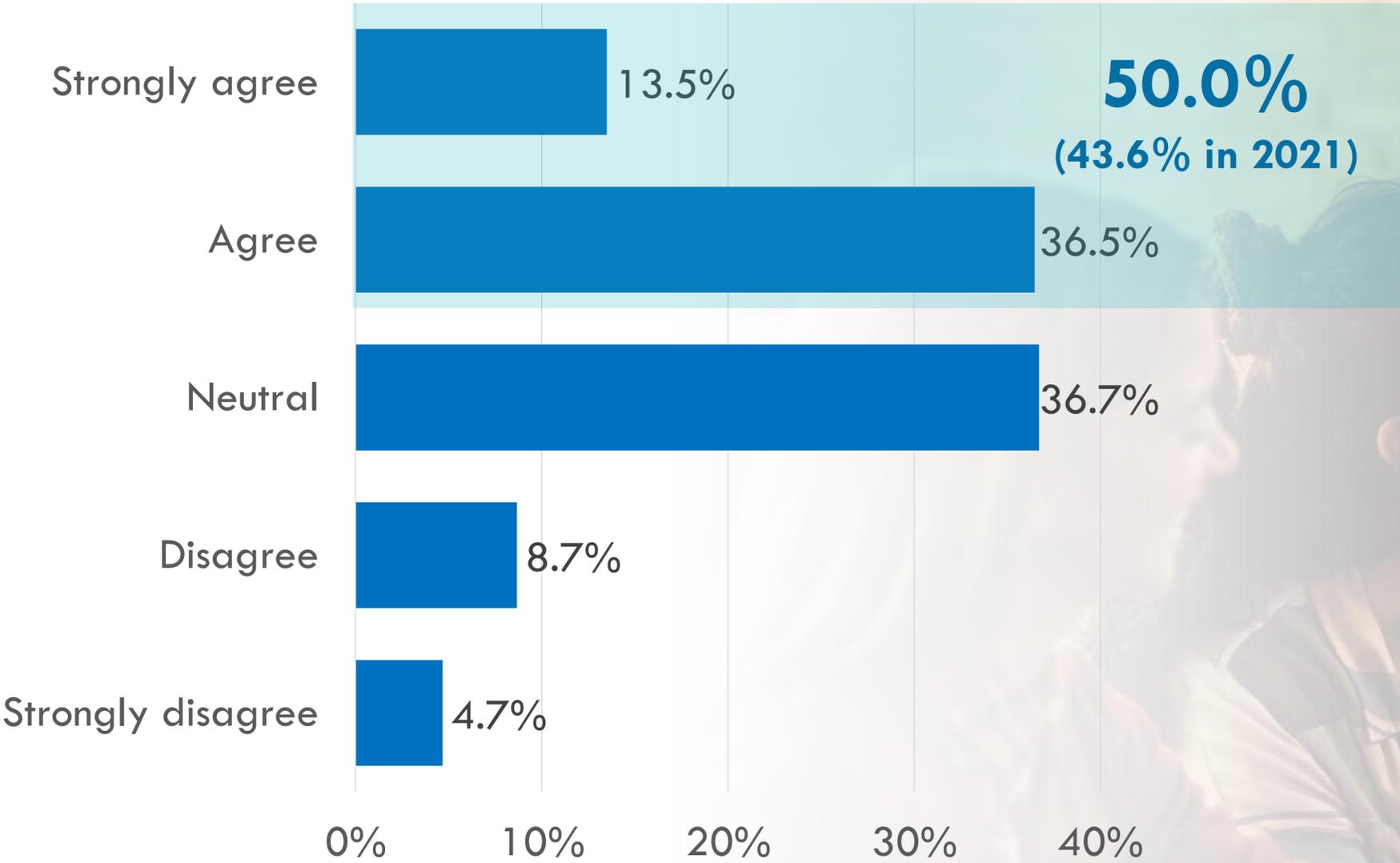
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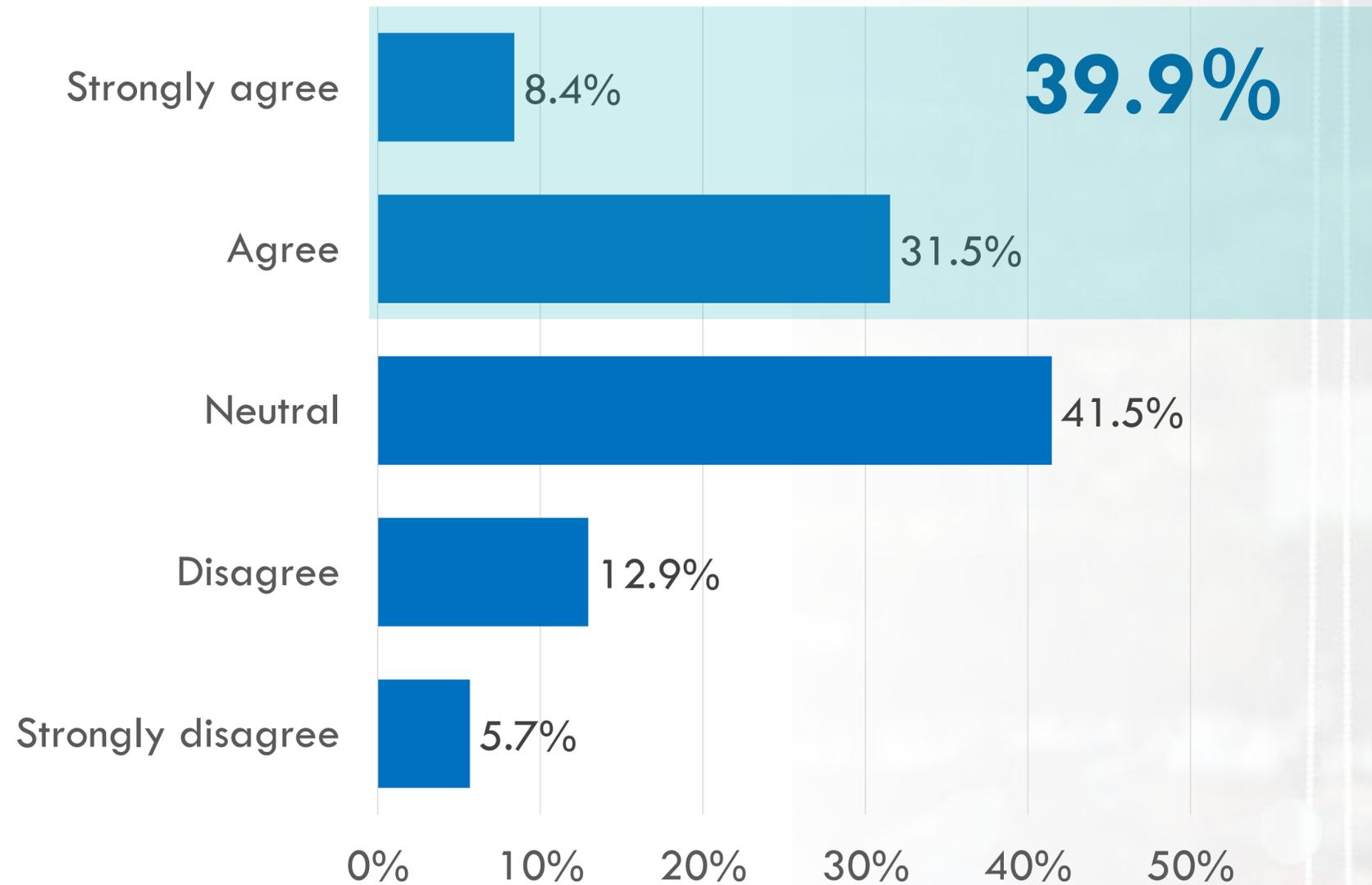
**Statement:** Visitors to where I live have a mainly positive impact on my community.

# “I ENJOY INTERACTING WITH VISITORS TO MY COMMUNITY”



**Statement:** I enjoy interacting with visitors to my community.

# “LOCAL RESIDENTS WHERE I LIVE FEEL THEY HAVE SOME, OR A LOT, OF INFLUENCE ON THE DEVELOPMENT OR MANAGEMENT OF TOURISM IN OUR COMMUNITY.”

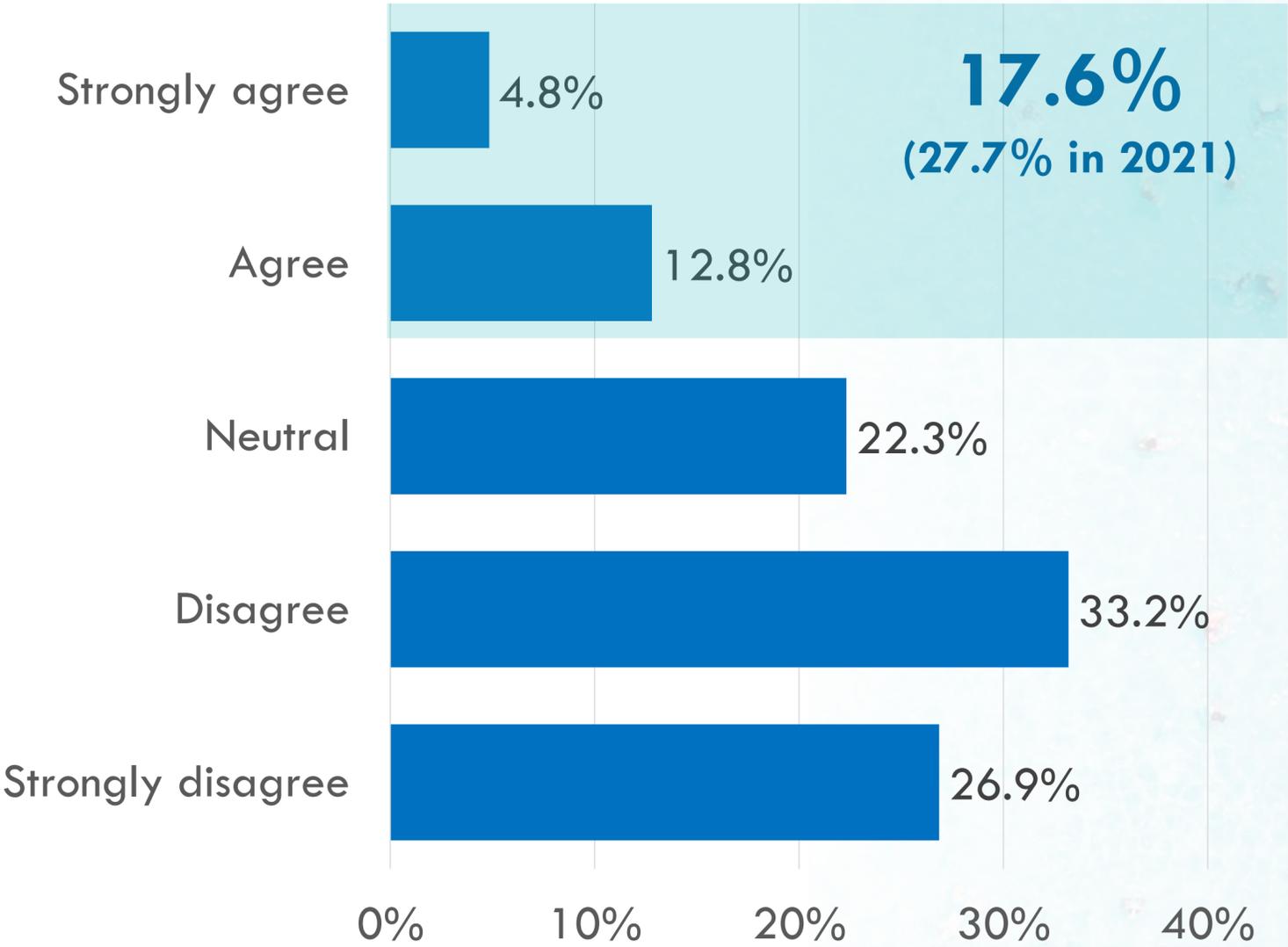


**Statement:** Local residents where I live feel they have some, or a lot, of influence on the development or management of tourism in our community.

The State of the American Traveler, Destination Management Edition, Destination Analysts, Inc. October 2022



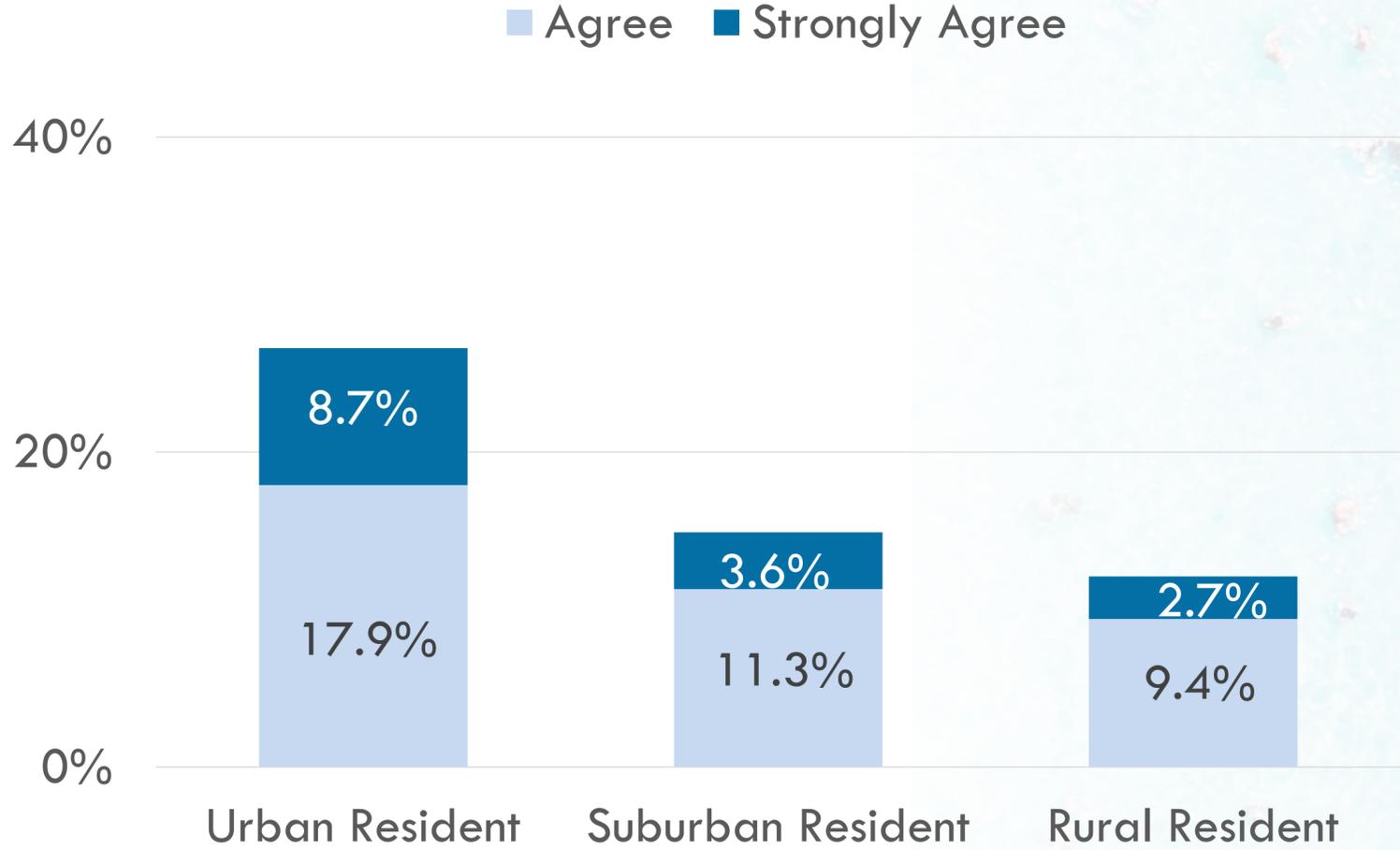
# “I LIVE IN A PLACE THAT HAS AN ISSUE WITH OVER-TOURISM”



**Statement:** I live in a place that has an issue with OVER-TOURISM (i.e., a place that has too many tourists)

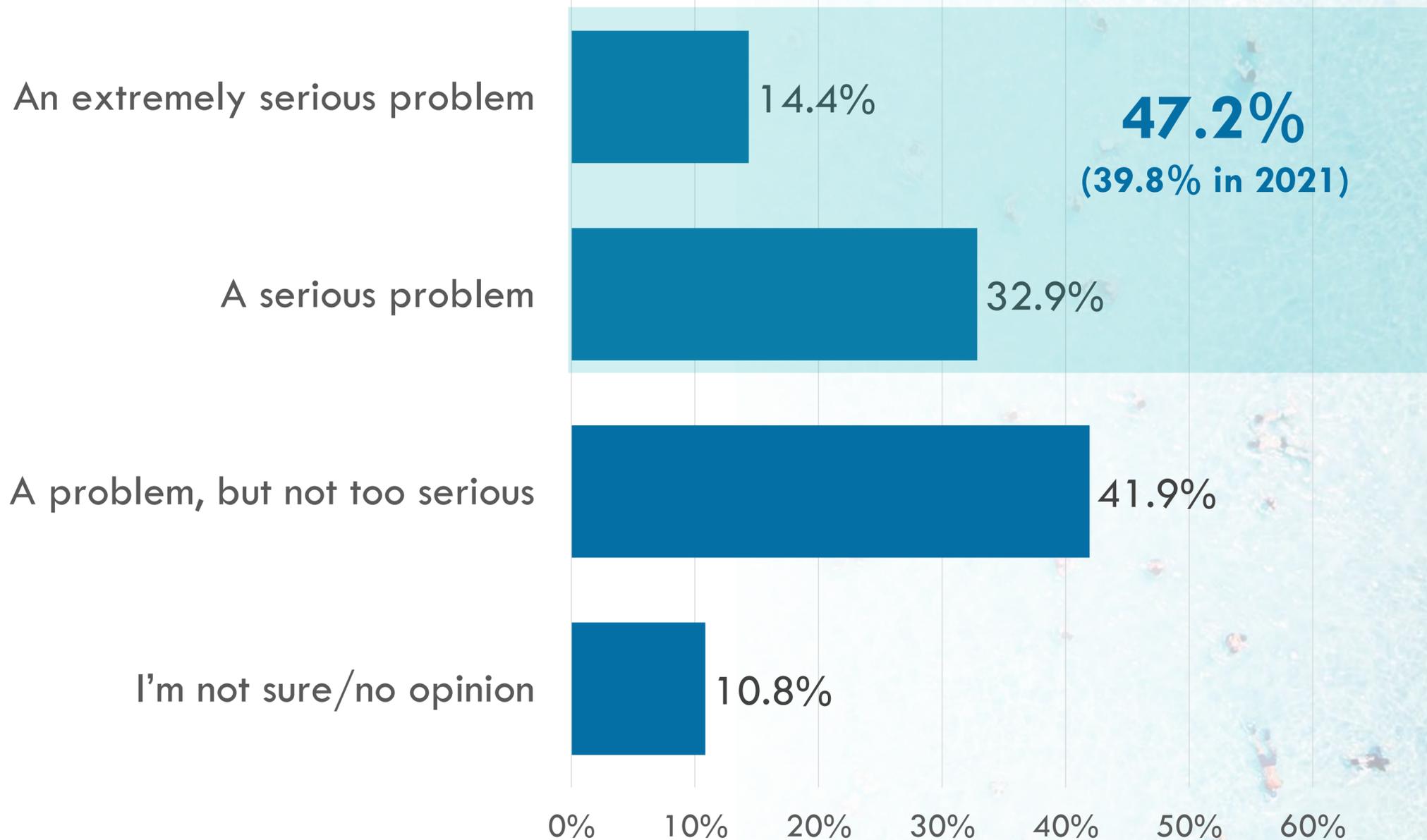
# “I LIVE IN A PLACE THAT HAS AN ISSUE WITH OVER-TOURISM”

## BY AREA OF RESIDENCE



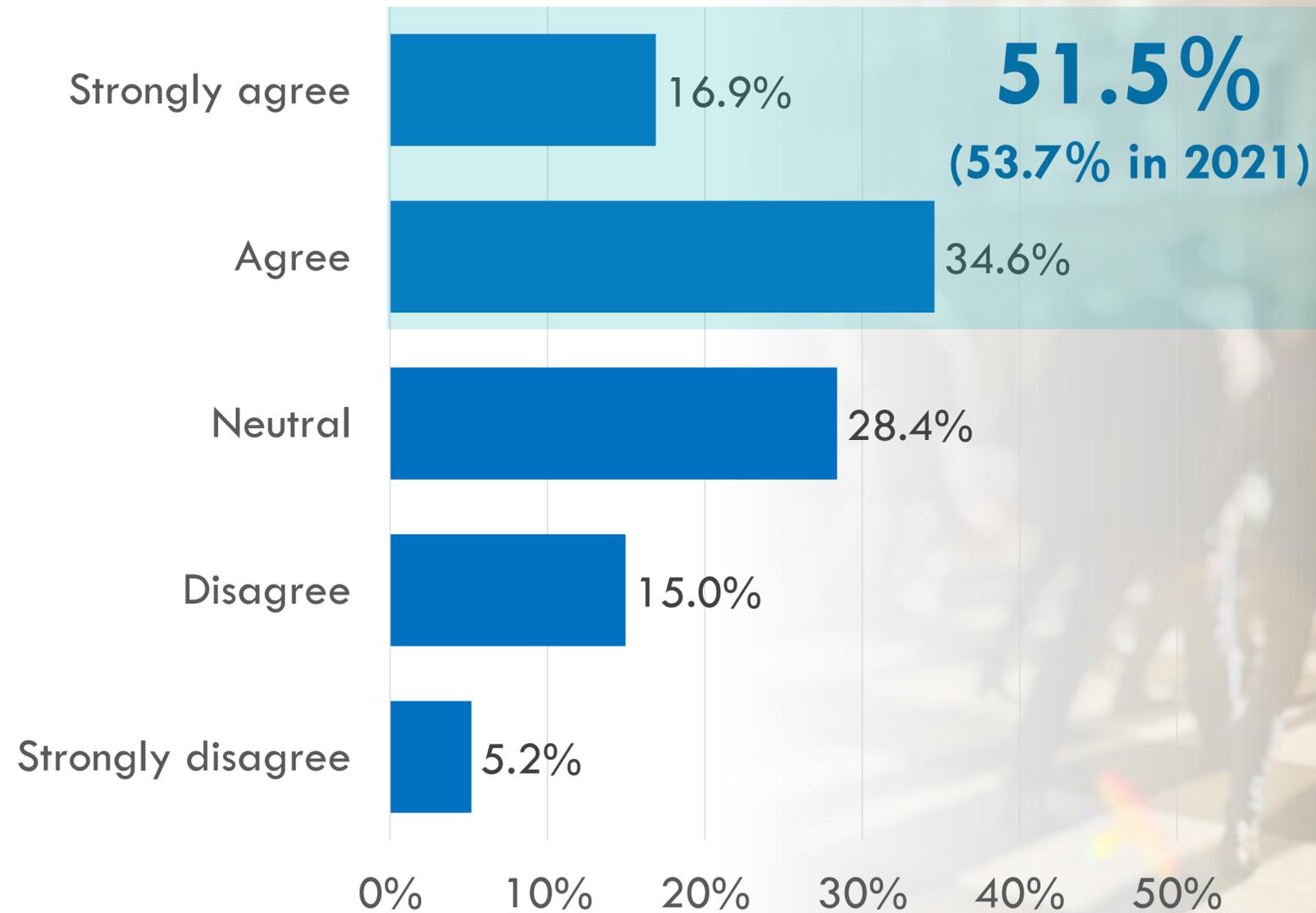
**Statement:** I live in a place that has an issue with OVER-TOURISM (i.e., a place that has too many tourists)

# SERIOUSNESS OF OVER-TOURISM IN COMMUNITY



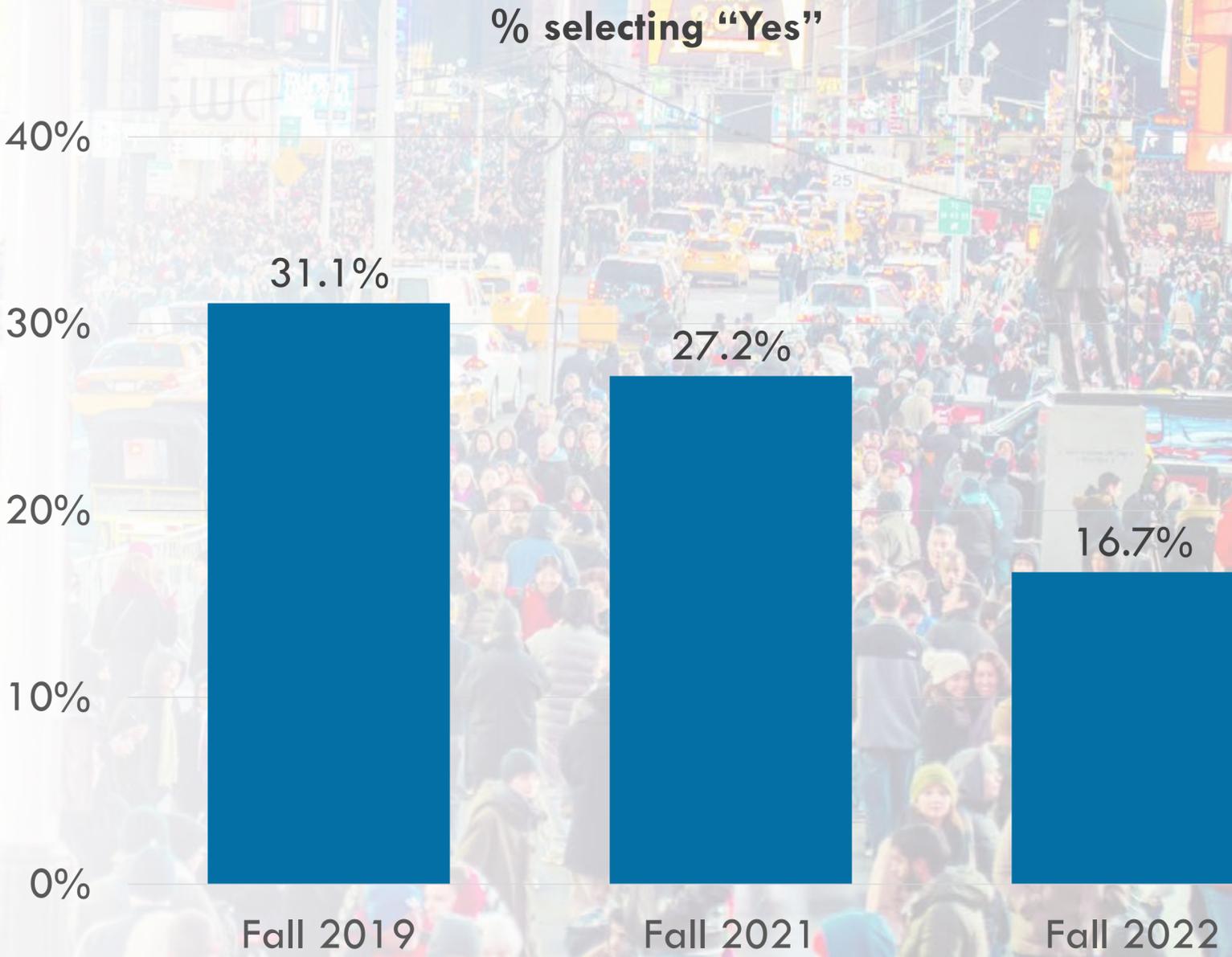
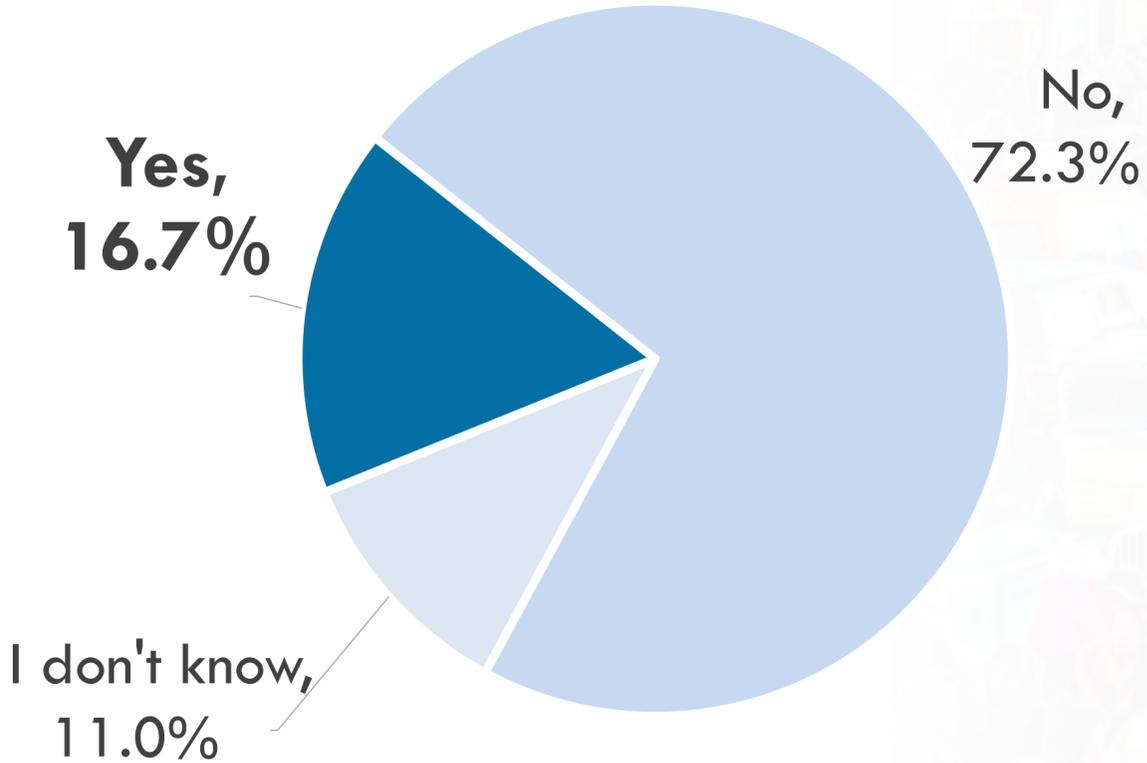
**Question:** How serious is the problem of OVER-TOURISM where you live? (Select one)

# “IF A U.S. DESTINATION HAS A PROBLEM WITH OVER-TOURISM, I AM LESS LIKELY TO VISIT IT.”



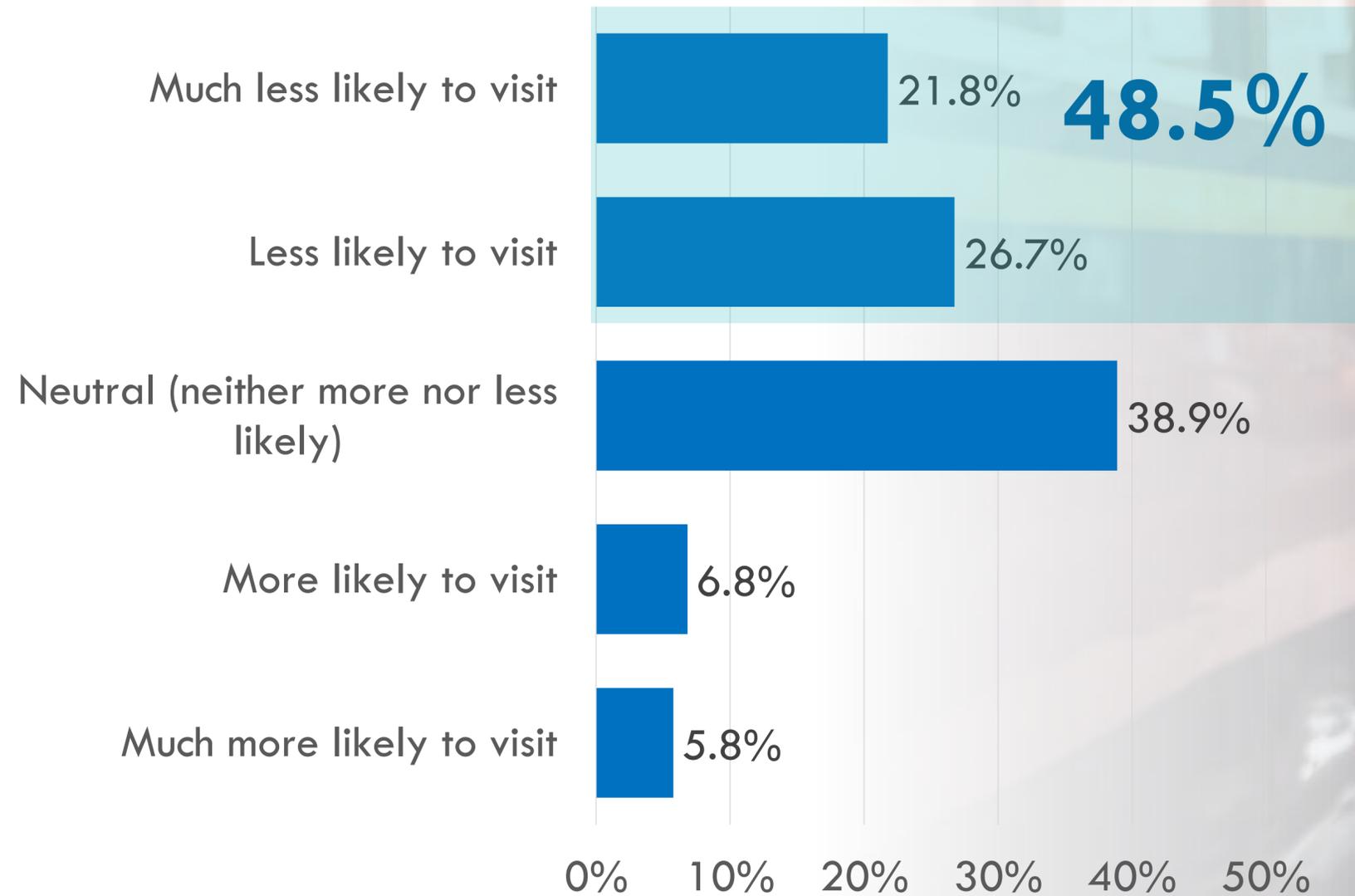
**Statement:** If a U.S. destination has a problem with OVER-TOURISM, I am less likely to visit it.

# VISITED A DESTINATION FACING ISSUES WITH OVER-TOURISM



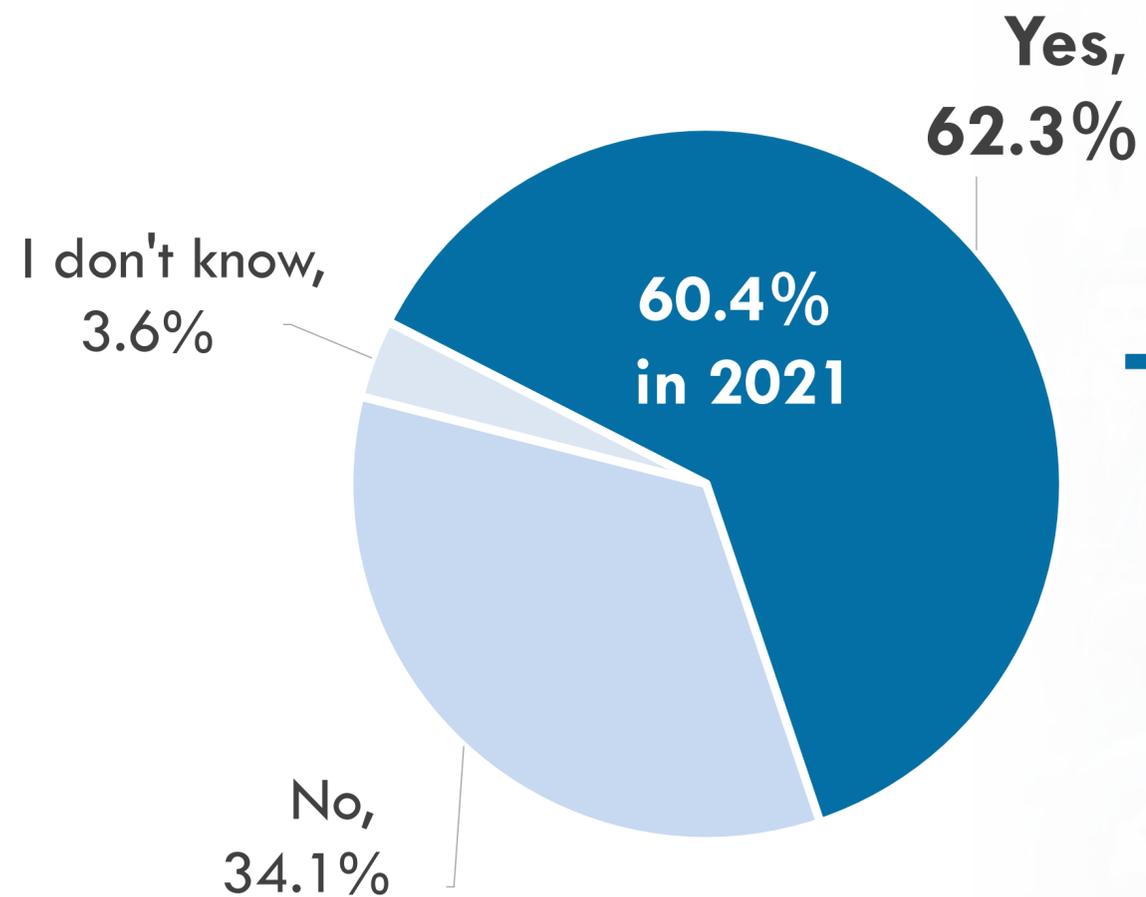
**Question:** In the PAST FIVE (5) YEARS, have you personally visited a U.S. destination that you felt had an issue with OVER-TOURISM?

# “BECAUSE OF OVER-TOURISM, I AM....”

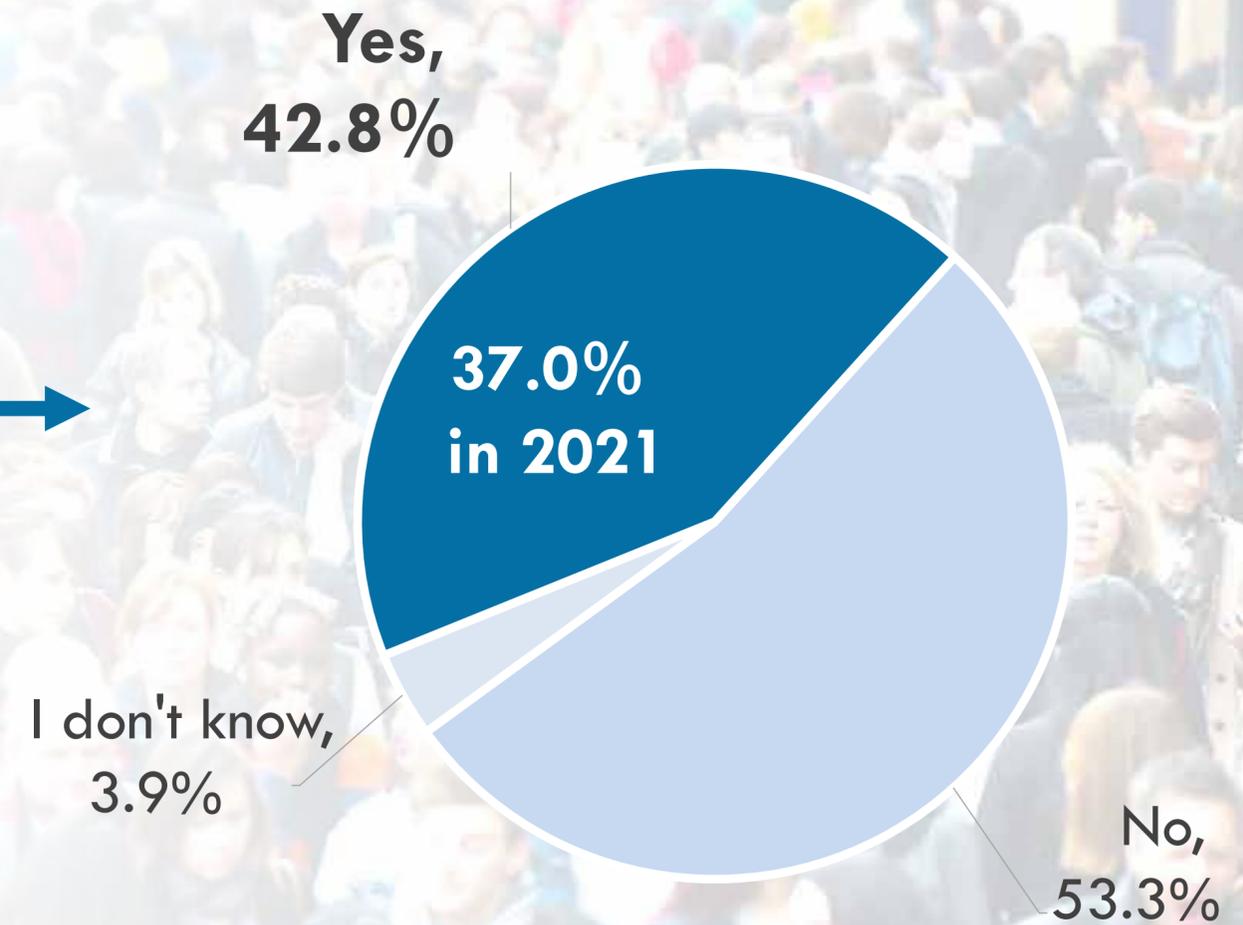


**Statement:** If a U.S. destination has a problem with OVER-TOURISM, I am less likely to visit it.

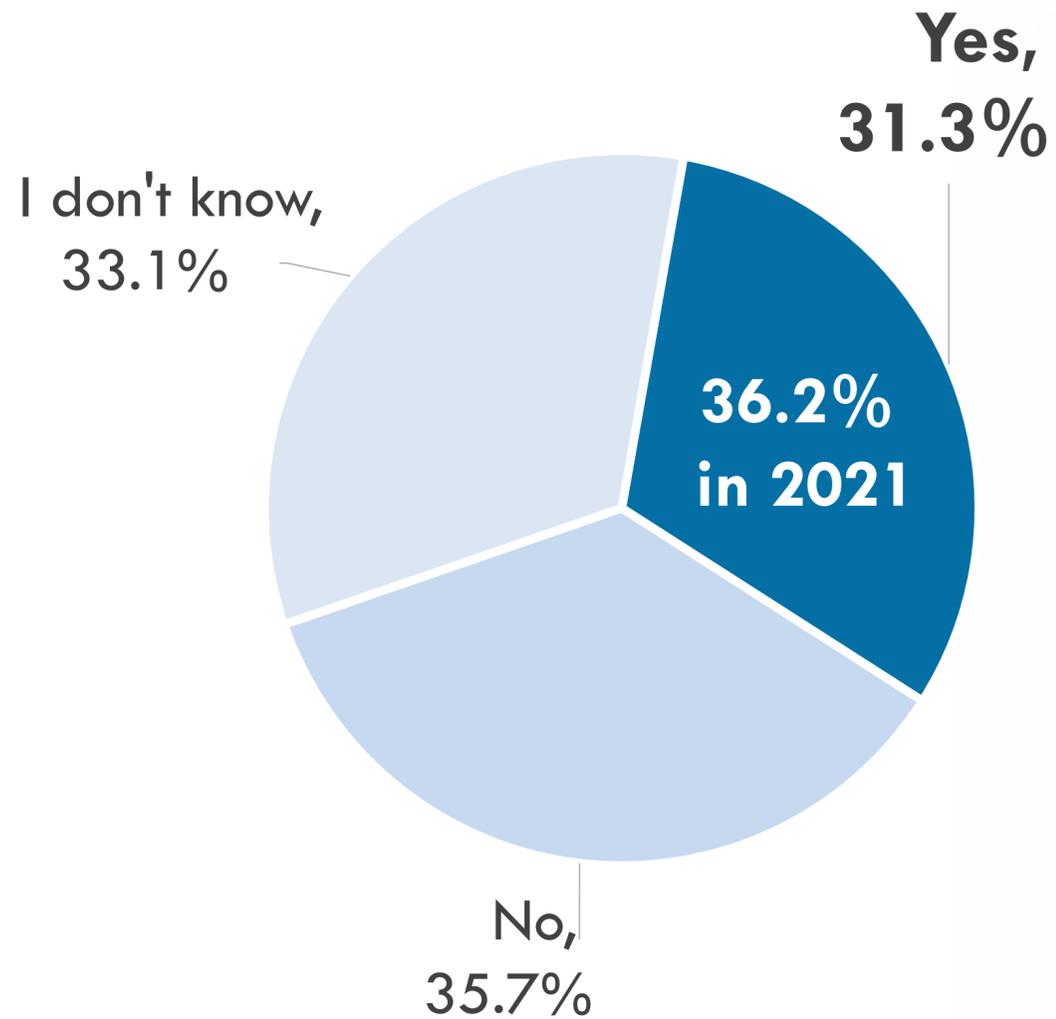
**QUESTION: HAVE YOU TOLD ANY FRIENDS OR RELATIVES ABOUT THIS DESTINATION HAVING AN OVER-TOURISM PROBLEM?**



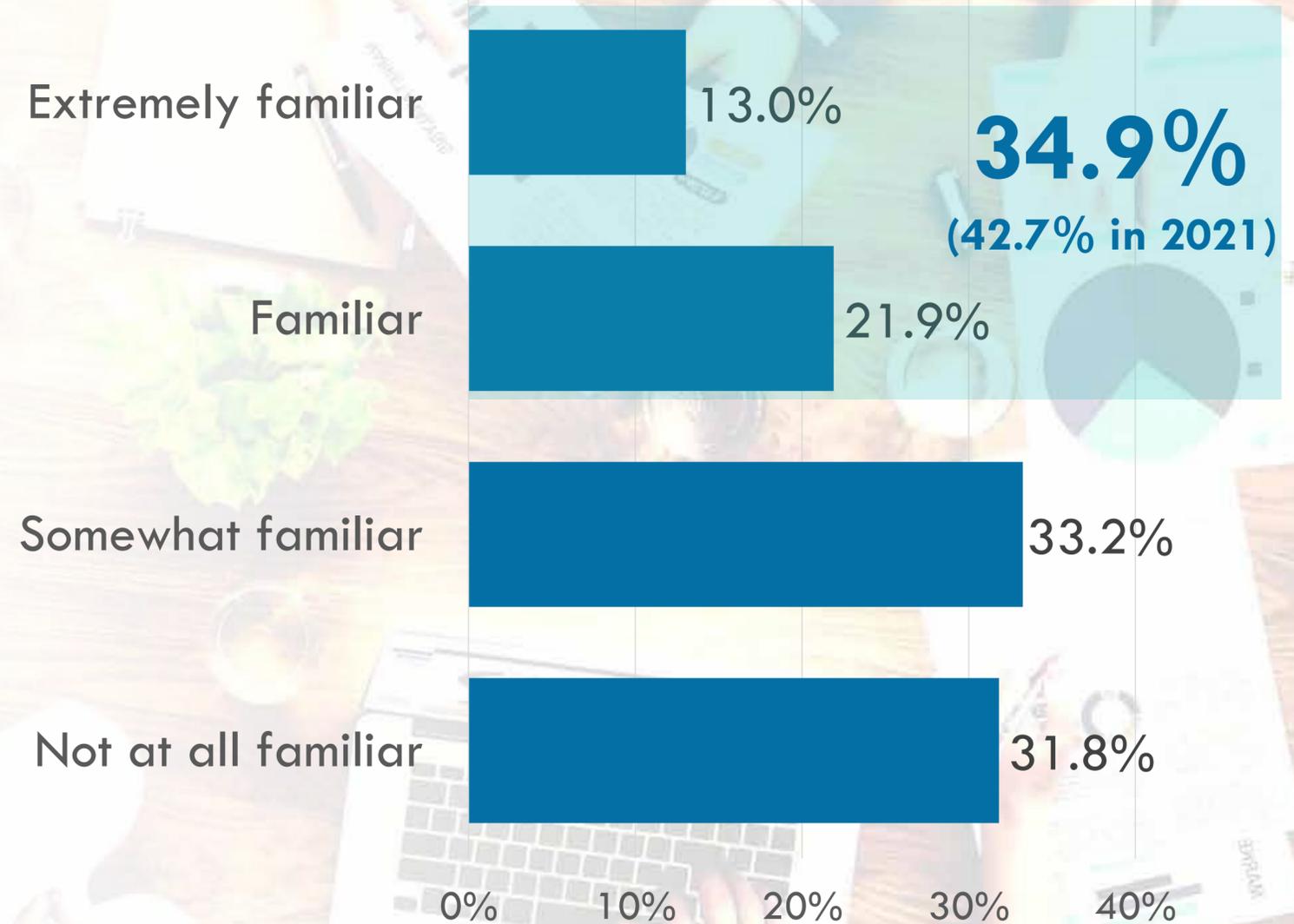
**QUESTION: DID YOU RECOMMEND THEY NOT VISIT THAT DESTINATION?**



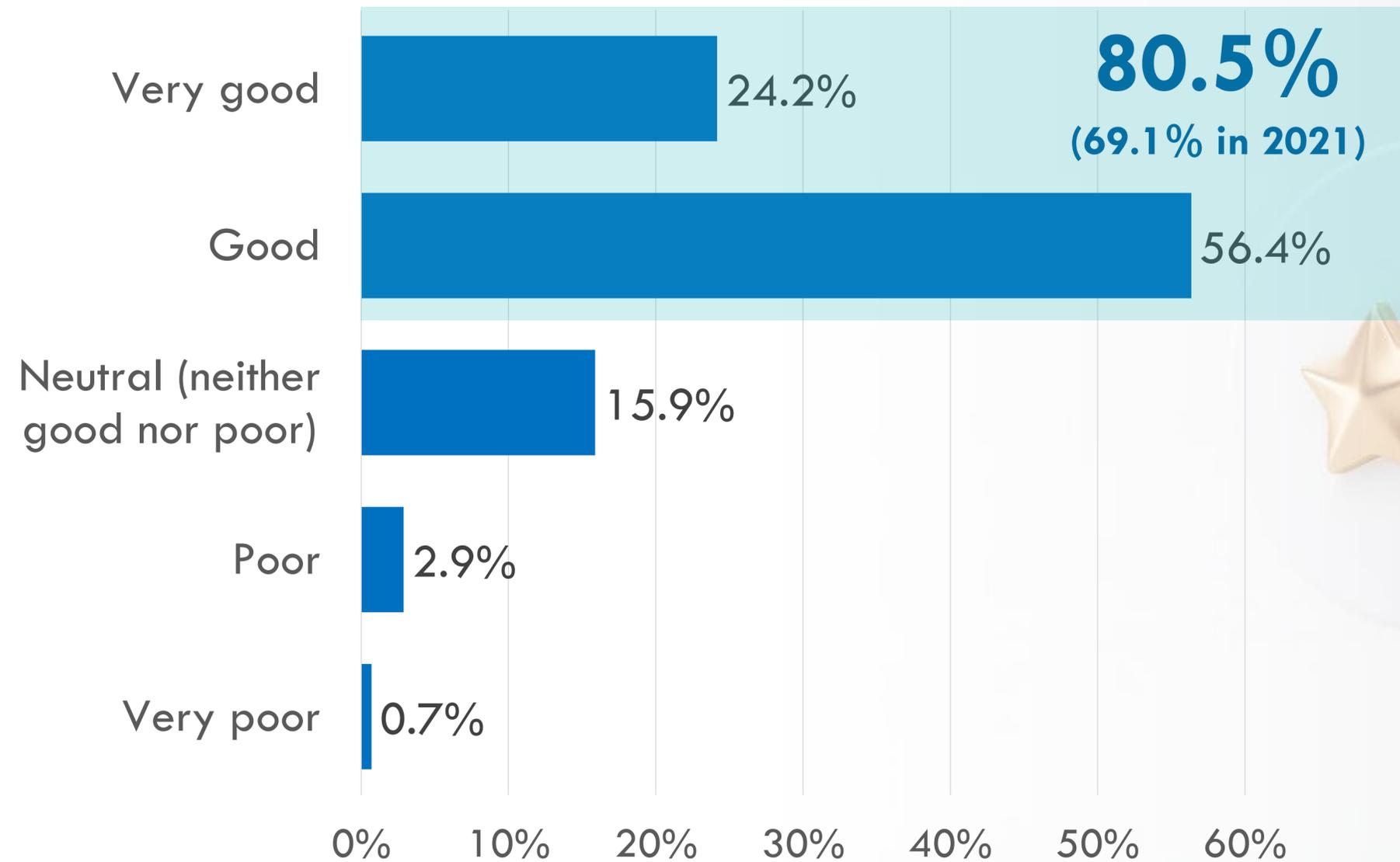
**QUESTION: DOES YOUR COMMUNITY HAVE AN OFFICIAL DESTINATION MARKETING ORGANIZATION?**



**QUESTION: HOW FAMILIAR ARE YOU WITH THE WORK DONE BY THIS ORGANIZATION?**



# RATING COMMUNITY'S OFFICIAL TOURISM MARKETING ORGANIZATION



**Statement:** Please rate the work your community's official tourism marketing organization does.

# TAKEAWAYS

**1** Optimism in taking more leisure trips in the next year is waning in the face of economic uncertainty.

**2** Younger American travelers are more concerned about the impact of travel on the environment than older generations.

**3** The majority of American travelers believe climate change will impact their travel in the next 5 years.

**4** Visitors are less likely to revisit a destination with over-tourism, and tend to share their negative experiences with others.



# WE ARE INTREPID

*For the real. For the curious.*

**Matt Berna, Intrepid Travel President, North America**

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Certified (B) Corporation

get cozy

get cozy

**TRAVEL IS BACK**  
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spring sushi ALL YOU CAN EAT

DOLLARAMA

milestones CHILL-BAR

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## B Corp Certified

We're the world's largest travel B Corp. That means we're committed to using business as a force for good, and continually ensure we're meeting the highest standard of ethical practices throughout all layers of our business.

Certified



Corporation





## Climate Conscious

Carbon neutral since 2010, the first global operator with verified, science based targets, and committed to sustainability in all its forms.

## Impact and Purpose Drives Booking Decisions

**81%**

want to immerse  
themselves into the local  
culture

**81%**

want the money they  
spend to go back to the  
local community

**78%**

want to have a positive  
impact on the community  
they are visiting

**62%**

want to be more  
thoughtful about where  
and how they travel

# How Does a DMO and Their Tourism Partners Attract and Support a Company Like Intrepid Travel?



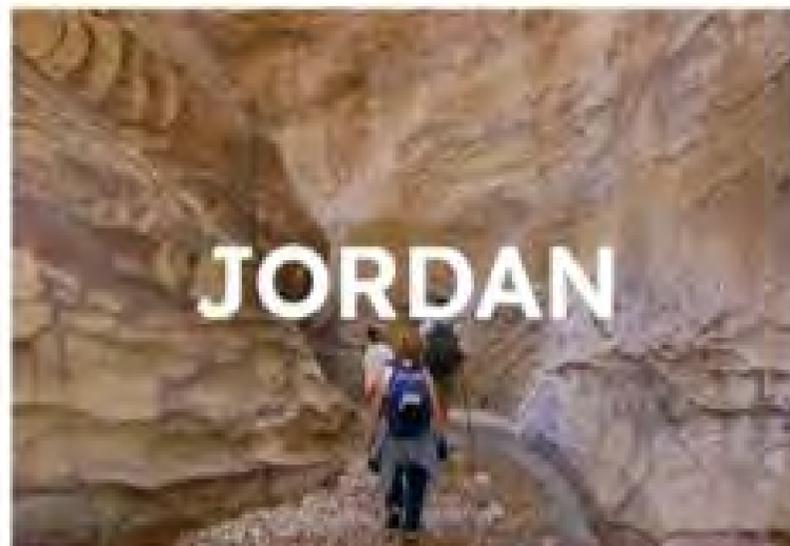
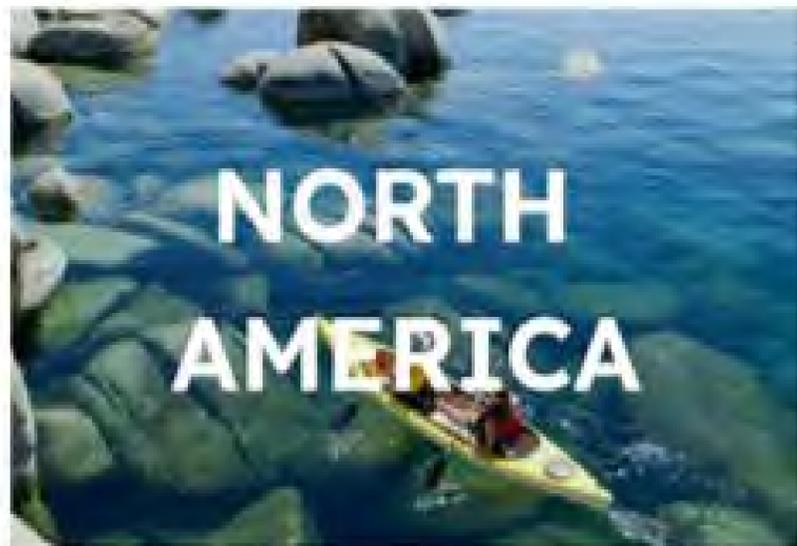




# Tourism Cares Meaningful Travel Maps

As the way we travel continues to evolve, we have seen the demand for more authentic sustainable travel experiences continue to grow. As a direct call to action, Tourism Cares has created a tool for travel professionals that satisfies that demand and actualizes the power of travel.

Developed in concert with our Meaningful Travel Summits, the Meaningful Map helps tour operators and travel advisors find vetted, authentic product that helps fuel impact into destinations around the world.



# Understand Demand



# Create Positive Impact





# Implement DEI Yourselves



**Our shared vision**

Change the way  
we all see the world.

*Thank you*

# Additional Resources

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Destination  Analysts

**miles**  
PARTNERSHIP

# THE STATE OF THE AMERICAN TRAVELER: DESTINATION MANAGEMENT EDITION

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Research, slides and other resources will be available at

[www.milespartnership.com/SAT](http://www.milespartnership.com/SAT)

[www.destinationanalysts.com](http://www.destinationanalysts.com)



Destination  Analysts

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North American Edition

TIME FOR

DEMOCRACY

WEBINAR

Wednesday, January 25, 11am ET



North America & South Pacific Lead

In association with:



and



Program Creator & European Lead

Destination Analysts



GLOBAL DESTINATION SUSTAINABILITY MOVEMENT



UPCOMING WEBINAR

# THE YEAR IN REVIEW AND THE YEARS AHEAD

Wednesday, December 14, 2pm ET

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Register at [www.MilesPartnership.com/year-review-and-years-ahead-2022](https://www.MilesPartnership.com/year-review-and-years-ahead-2022)

Q&A

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