Destinction Decisions

Powered by The State of the American Traveler March 5, 2024

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With You



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Destination Decisions

Research, slides and other resources will be available at:

www.milespartnership.com/SAT

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Decisions

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Destination Decisions 2024

Powered by The State of the American Traveler

We're a creative insights firm shaping strategies that capture hearts, minds, and *market share*.

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Opportunity powered by insight.

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Bringing the future of travel within reach

Overview & Methodology

- Monthly tracking study of a demographically and geographically representative group of adult American travelers
- 4,000+ unique completed surveys collected each month
- Multifaceted survey questionnaire addressing diverse set of traveler opinions, preferences, awareness, brand usage and behaviors
- Topline findings reflect data collected January 17th 23rd and have a confidence interval of +/- 1.6%.



Current Travel Sentiment

Elements Impacting Destination Decisions

Signature Events

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Current Travel Sentiment

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Travelers' personal financial sentiment weakened slightly at the start of the new year

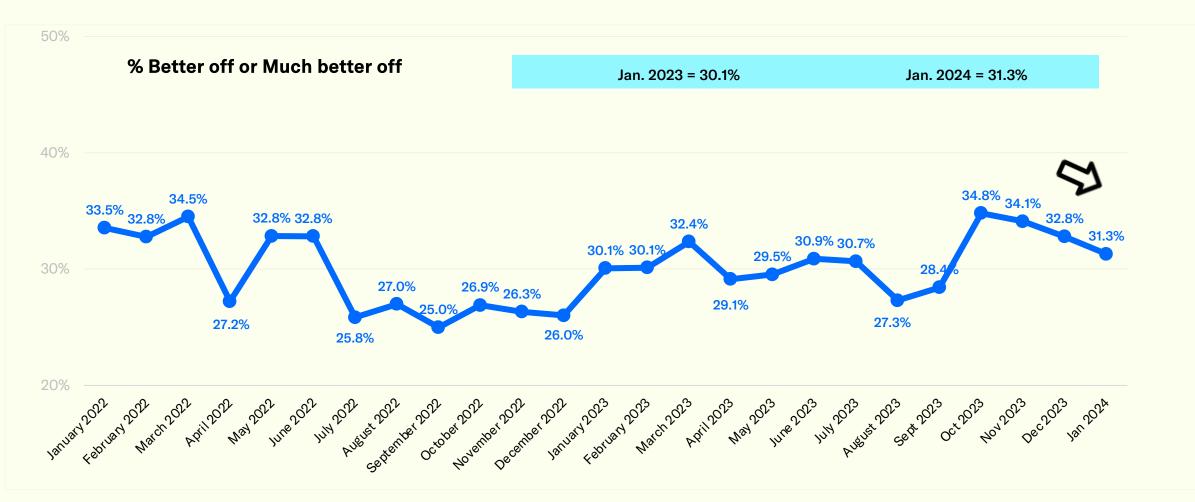
Perceptions of high expense remain the top impediment to travel

	Personal financial reasons	37.3%
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)	Travel is too expensive right now	34.7%
	Gasoline was too expensive	24.6%
	Airfare was too expensive	24.6%
	I'm too busy at work	21.3%
	Not enough PTO/vacation time	15.0%
	Safety concerns - risk of contracting the COVID virus	13.3%
	Weather	12.9%
	Crowds - too many people traveling	11.8%
	Health/III ness	9.7%
	Safety concerns (other non-COVID related)	9.5%
	The possibility of flight cancellations	8.9%
	The pandemic is not 100% over	6.9%
	Lack of availability (at hotels, golf courses, spas, etc.)	4.0%
	Sold out/No reservations available	3.5%
	NONE OF THESE	19.0%

Current financial sentiment has weakened since last fall.

Question:

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

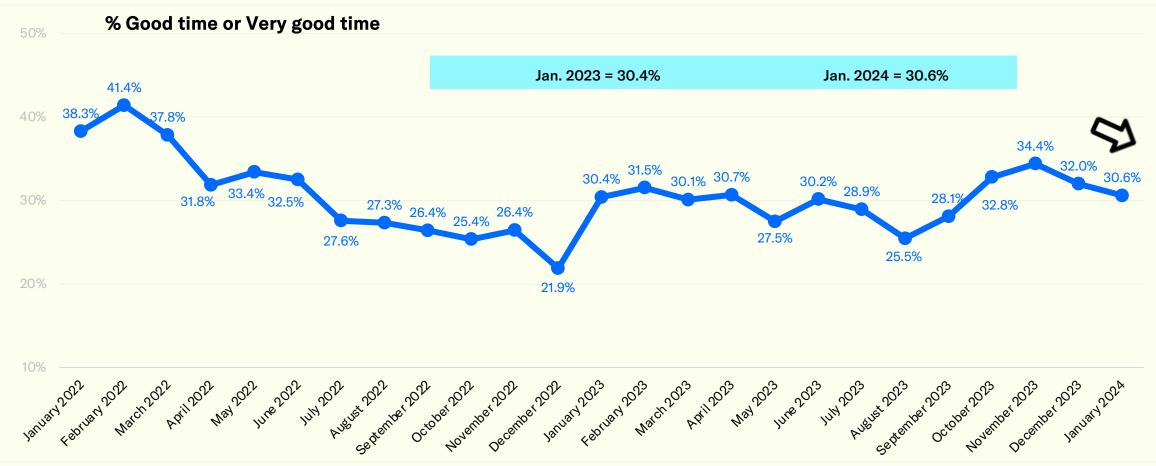


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The belief that the present is a good time to spend on travel weakened over the last few months

Question:

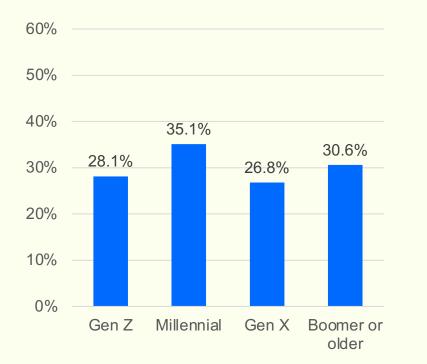
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



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A deeper look: Who is feeling good about spending on travel right now?

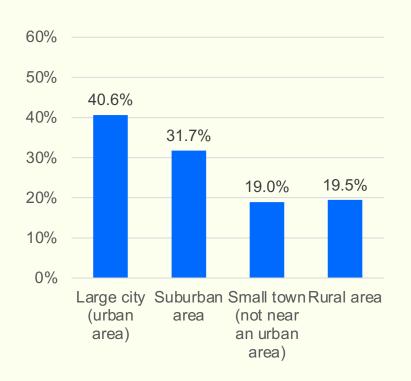
Generation



Annual Household Income



Place of Residence



Statement:

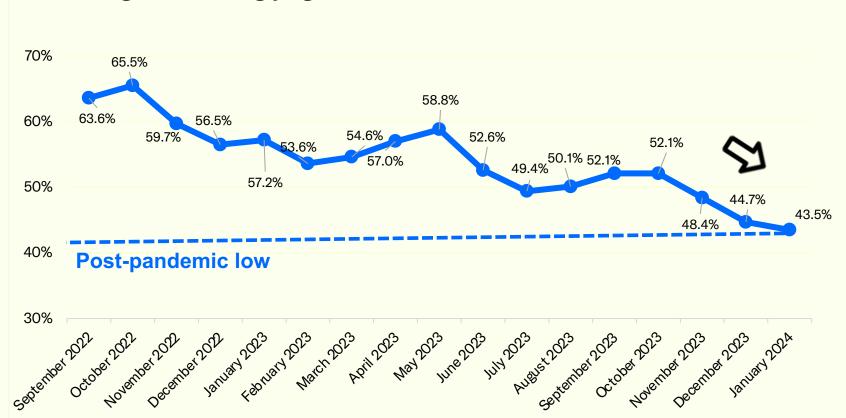
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

Recession concerns continue to subside

Most American travelers no longer expect a pending recession.

Statement:

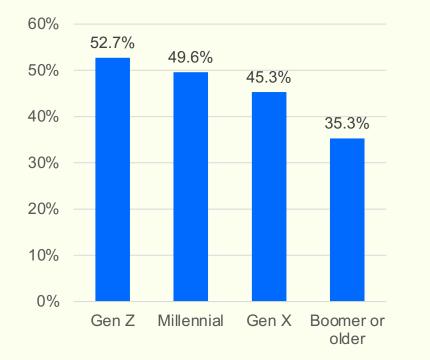
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



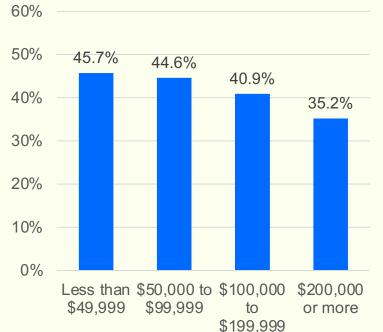
80% - % Agree or Strongly agree US will enter a recession

A Complex Landscape: Who Expects Recession

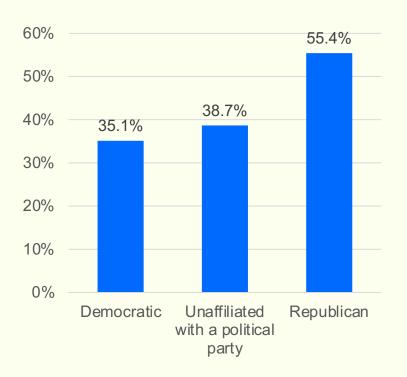
Generation



Annual Household Income



Political Affiliation



Statement:

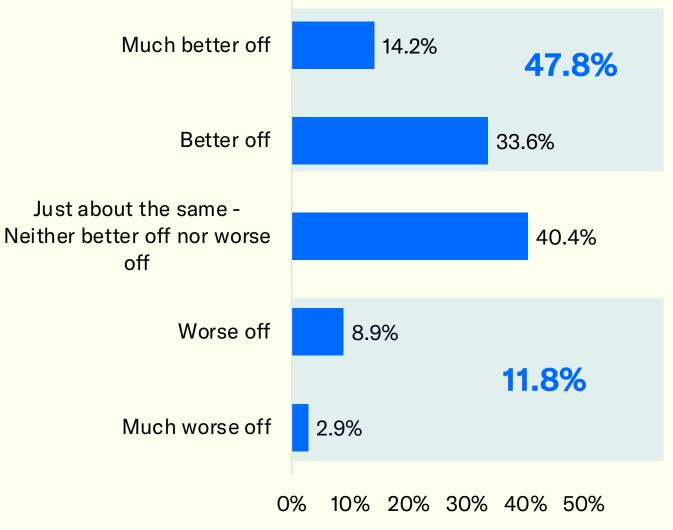
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

Travelers are still largely optimistic about their financial future—and continue to hold high levels of excitement for travel.

Most travelers maintain a sense of optimism about their future finances.

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?



Travel budgets have increased

Question:

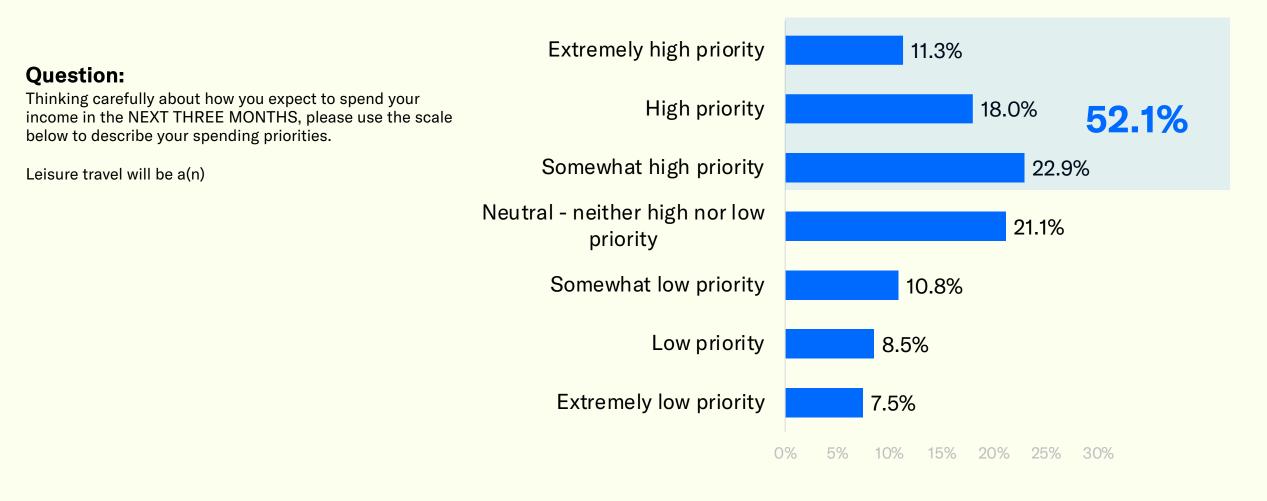
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Mean Maximum Expected Spending

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52% intend to make leisure travel a spending priority in the next three months.



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Excitement to travel remains at near record-high levels

Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?

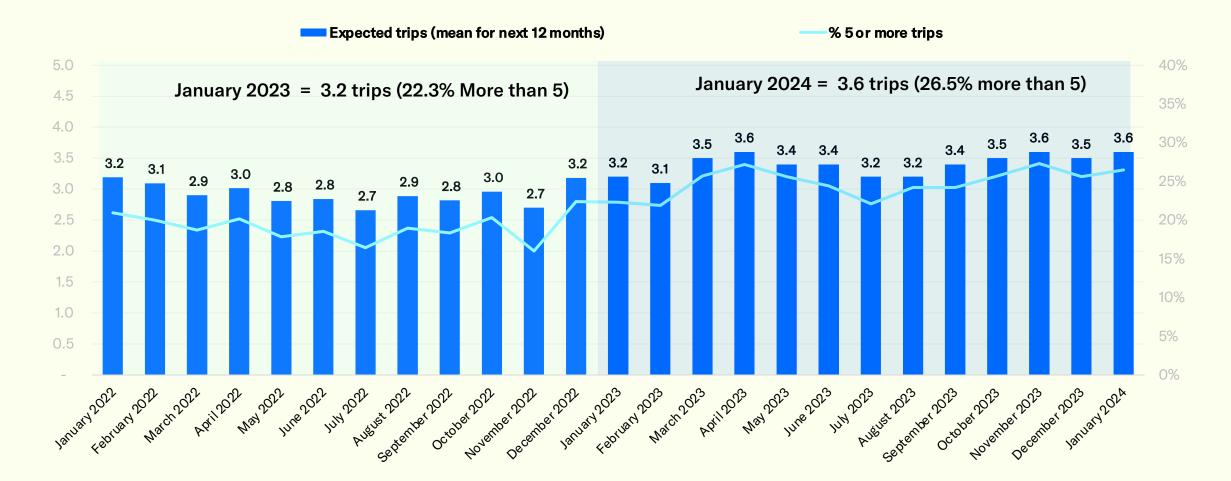


Expectations for future travel volume remain robust

Travel expectations are well above 2023 levels.

Question:

IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?

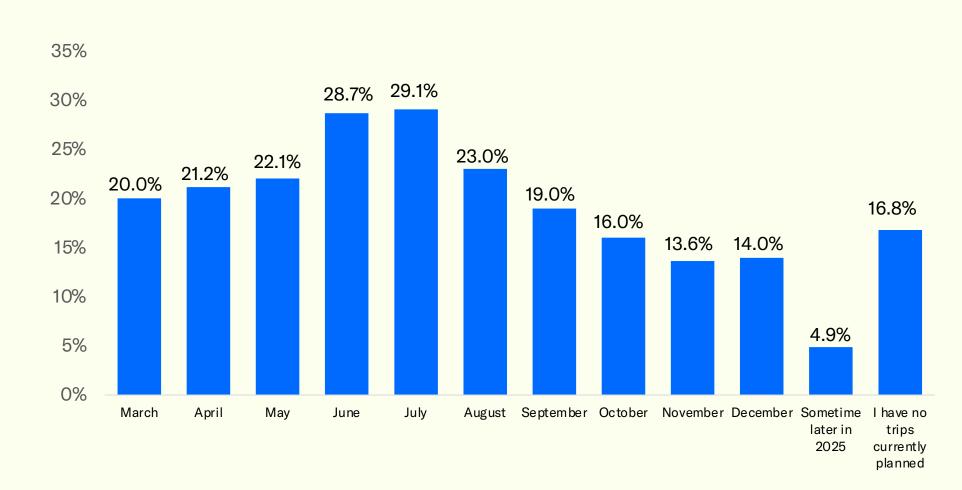


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Over 87% have trips already planned

Question:

In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



Future Partners (Base: All respondents, 4,397 completed surveys. Data collected January 17-23, 2024.)

INFORMATION

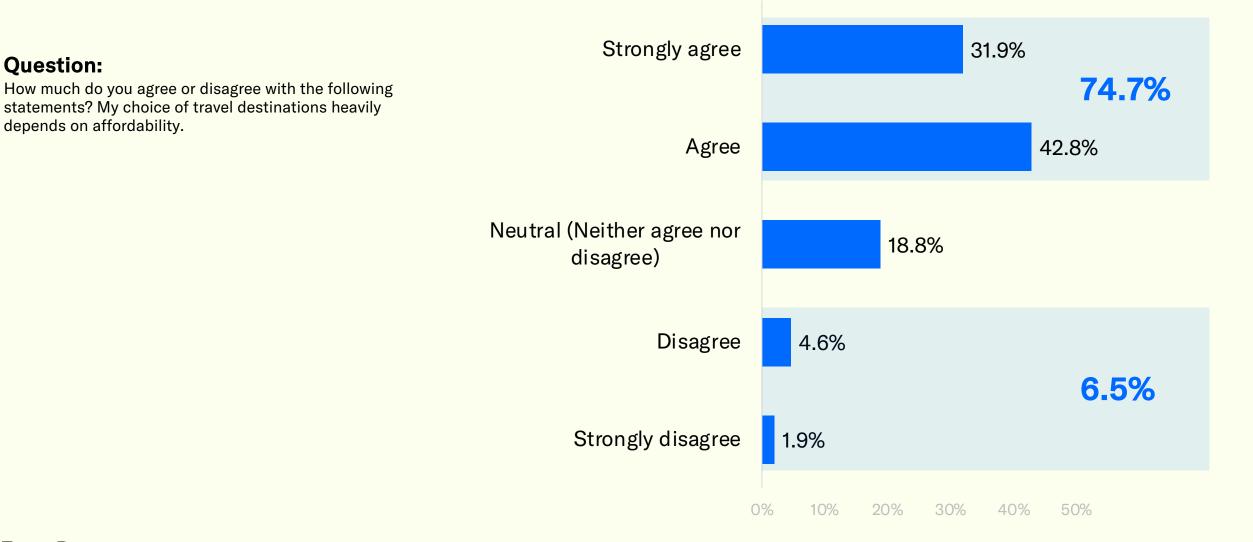
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Desired Information for Destination Decisions

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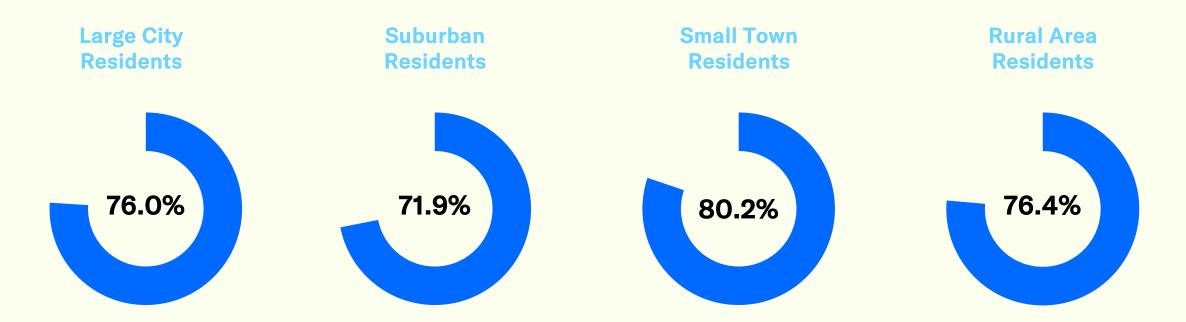
Understanding the affordability of a destination is a key component to travelers' destination decisions.



Future Partners The State of the American Traveler, January 2024

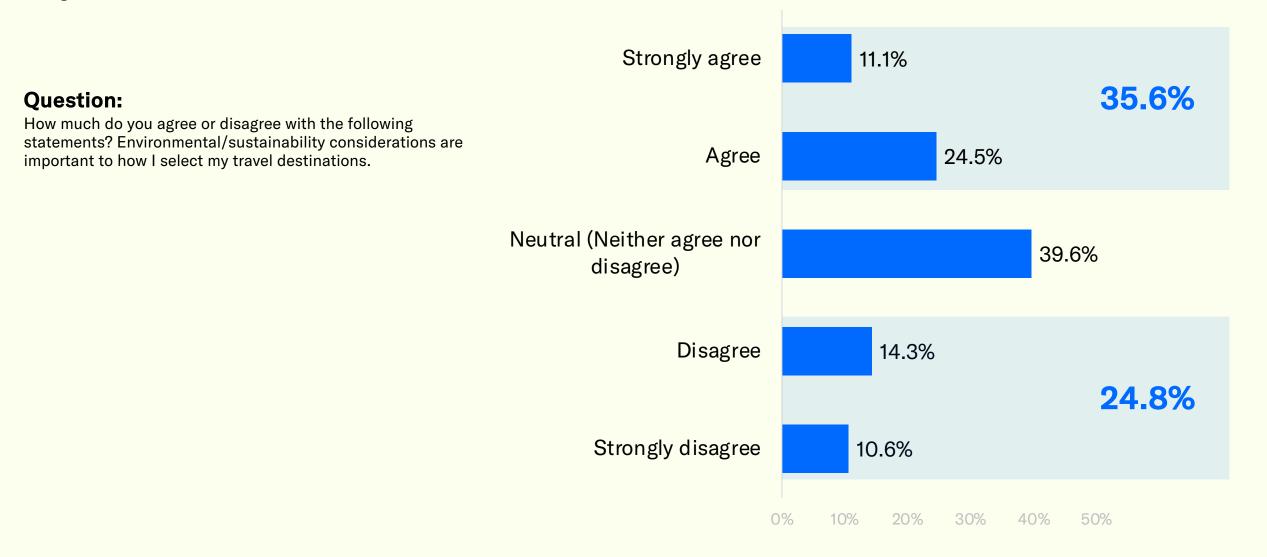
Affordability is important across the board, but agreement levels are highest among small town residents.

Question: How much do you agree or disagree with the following statements? My choice of travel destinations heavily depends on affordability.



Top 2 Box Agreement by Type of Residence

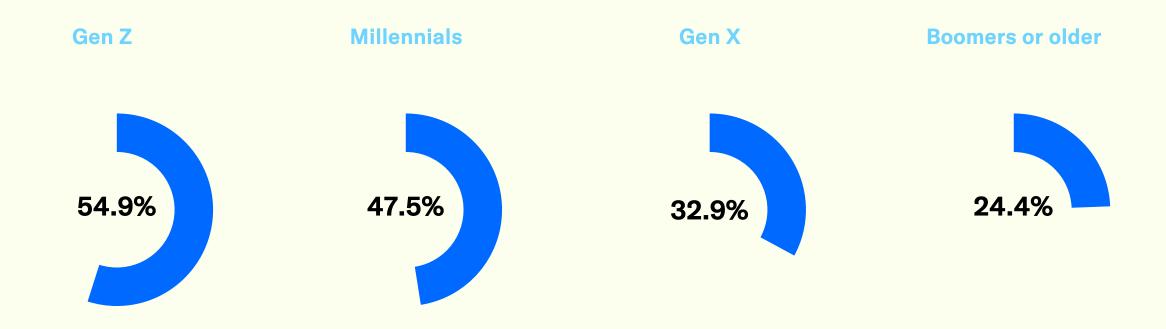
One-third of all travelers agree that environmental or sustainability considerations are important to their destination decision.



However, a significantly higher share of younger travelers agree that environmental or sustainability considerations factor into their decision.

Question: How much do you agree or disagree with the following statements? Environmental/sustainability considerations are important to how I select my travel destinations.

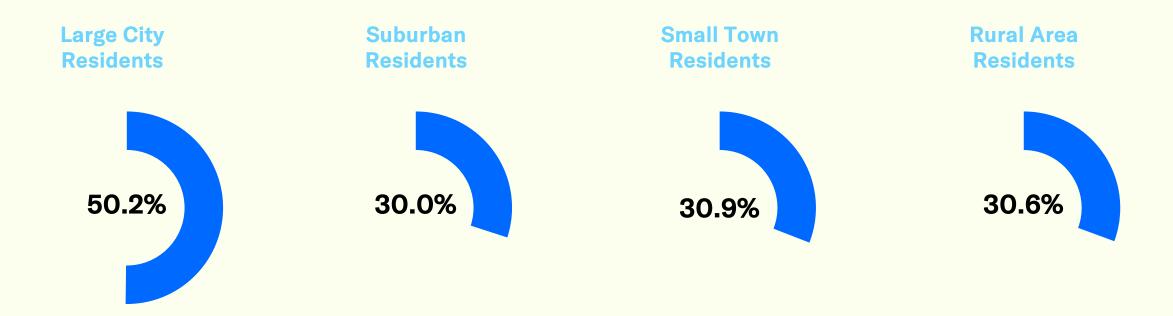
Top 2 Box Agreement by Generation



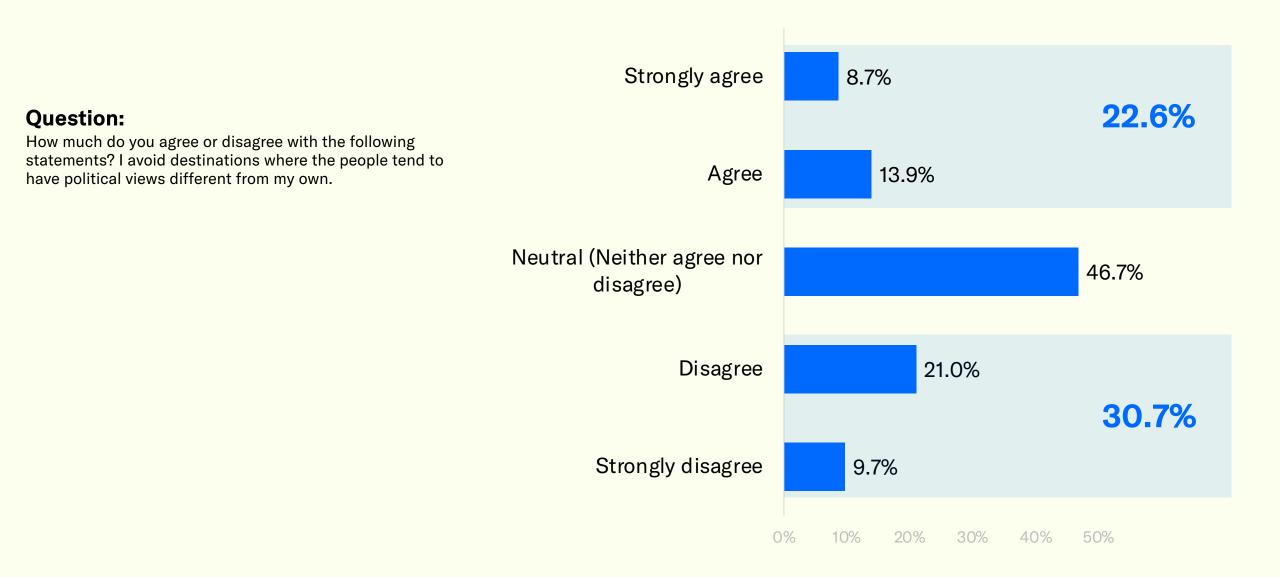
Similarly, half of large city residents agree that these considerations are important to how they decide on where to travel.

Question: How much do you agree or disagree with the following statements? Environmental/sustainability considerations are important to how I select my travel destinations.

Top 2 Box Agreement by Type of Residence



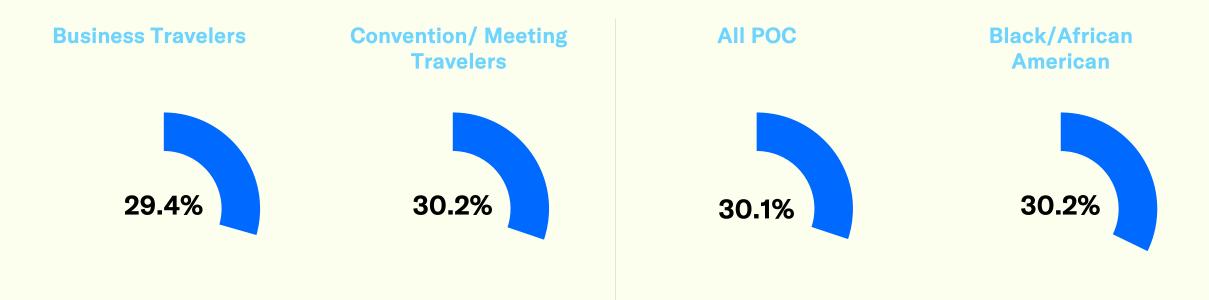
Clashing political views is a deterrent for a share of American travelers.



But business travelers and people of color, particularly Black Americans, are much more likely to agree a destination's politics can be a deterrent.

Question: How much do you agree or disagree with the following statements? I avoid destinations where the people tend to have political views different from my own.

Top 2 Box Agreement



LGBTQIA+ and travelers with disabilities are also more likely to avoid destinations because of the political atmosphere.

Question: How much do you agree or disagree with the following statements? I avoid destinations where the people tend to have political views different from my own.



A Look Back: 2017



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Cities are the dominant destinations of late, although there is, of course, significant trip volume to rural and suburban areas

Question: Thinking about the PRIMARY DESTINATION(S) visited on this most recent overnight trip, which of these describe where you visited? (Select a that apply)

Cities or metropolitan areas	44.6%
Small towns, villages or rural destinations/attractions	24.3%
Suburban areas	24.0%
Mountain destinations/resorts (including ski resorts)	8.8%
National Parks	8.3%
State, county or regional parks or recreation areas	8.2%
Theme or amusement parks	7.9%
Desert destinations or resorts	4.0%

Beach Destinations

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Costs and the food scene are key information for deciding to visit a beach destination.

Most important type of information for a beach destination or resort

Question:

Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a BEACH **DESTINATION OR RESORT?**

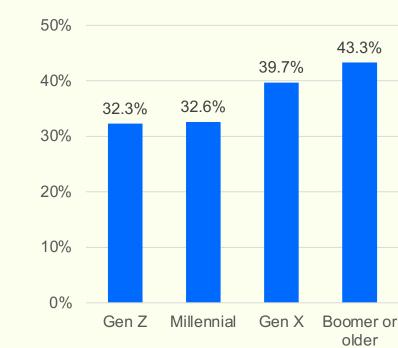
Hotel costs	48.2%
Restaurants and food scene	46.4%
Overall destination costs	45.8%
Safety of destination	39.5%
Hotels and lodging information	38.4%
Transportation and how to get around	30.5%
Outdoor activities	29.9%
Ways to experience nature	20.4%
Ease of access - Proximity to my home	18.6%
Historic attractions	17.1%
Festivals and special events	14.9%
Events and shows	13.7%
Arts and cultural activities	10.6%
None of these	7 .6%
C	0% 50% 100%

Older travelers desire information about total costs, lodging, and historic attractions when considering a beach destination.

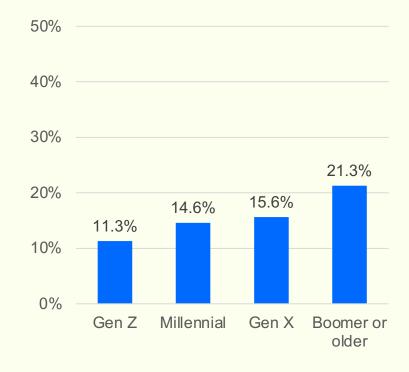
Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a BEACH DESTINATION OR RESORT?

Hotels & lodging information

Overall destination costs







50% 47.9% 48.2% 40% 40% 30% 20% 10% Gen Z Millennial Gen X Boomer or older

Under Destinations

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Understanding hotel costs, safety, and food scene are most important for helping travels decide on an urban destination.

Most important type of information for an urban or large city destination

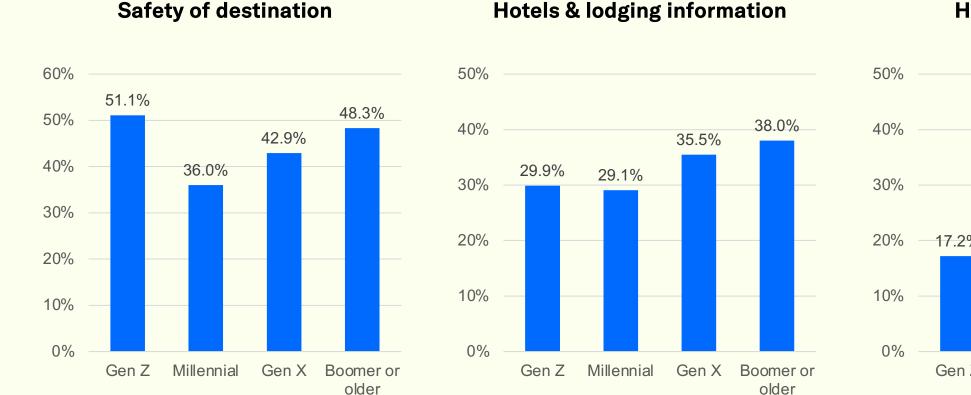
Question:

Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit an URBAN **OR LARGE CITY DESTINATION?**

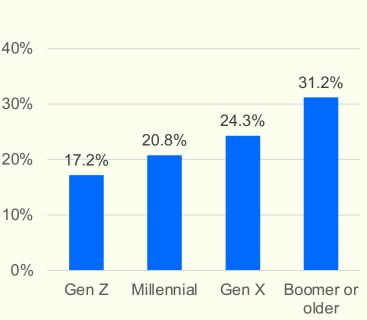
Hotel costs	44.8%	
Safety of destination	43.4%	
Restaurants and food scene	42.9%	
Overall destination costs	39.7%	
Transportation and how to get around	35.7%	
Hotels and lodging information	34.1%	
Historic attractions	25.3%	
Events and shows	21.6%	
Festivals and special events	19.0%	
Arts and cultural activities	18.3%	
Ease of access - Proximity to my home	16.2%	
Outdoor activities	14.3%	
Ways to experience nature	10.3%	
None of these	8.6%	
(0% 20% 40% 60%	

Information about safety in an urban destination is of particular importance to Gen Z travelers, but much less so for Millennials.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit an URBAN OR LARGE CITY DESTINATION?



Historic attractions



Netional Parks

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While overall destination costs is still key information sought for national parks destinations, this is on par with information about experiencing nature and outdoor activities.

Most important type of information for a national park

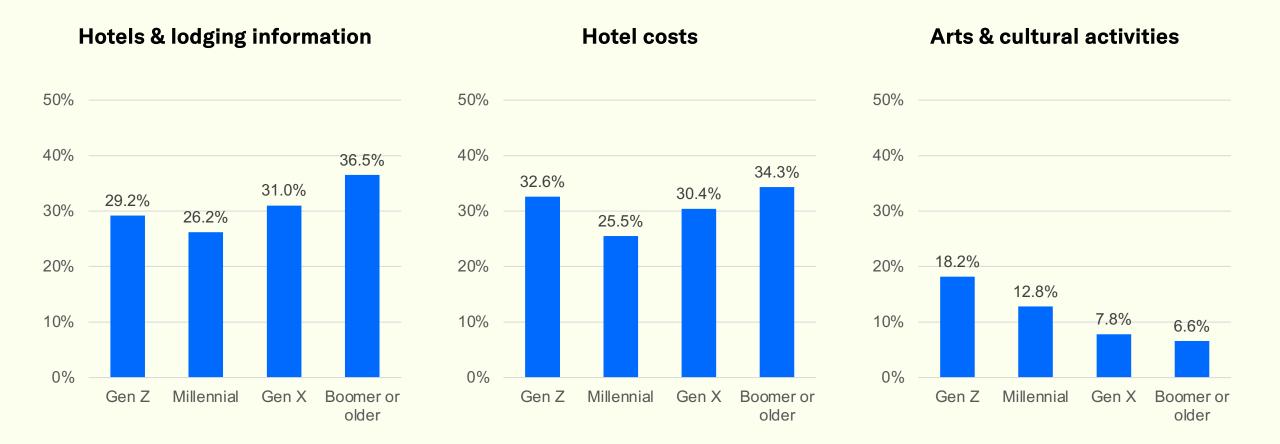
f the following types of travel information would be MPORTANT in helping you decide to visit a IAL PARK?	Ways to experience nature		37.9%
	Overall destination costs		37.7%
	Outdoor activities		37.7%
	Hotels and lodging information		31.5%
	Transportation and how to get around		31.0%
	Hotel costs		30.5%
	Safety of destination		30.4%
	Historic attractions		28.1%
	Restaurants and food scene		24.0%
	Ease of access - Proximity to my home	18	.9%
	Festivals and special events	10.5%	
	Arts and cultural activities	9.5%	
	Events and shows	9.4%	
	None of these	11.9%	
		0% 20%	40%

Question:

Which of MOST IM NATIONA

Millennials are least likely to need hotel information to decide on a national park, while Gen Z wants to know about arts & cultural activities.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a NATIONAL PARK?



Mountain Destinations

uture Partners The State of the American

Information about costs and outdoor activities are key for travelers when deciding on a mountain destination.

Most important type of information for a mountain destination or resort

20%

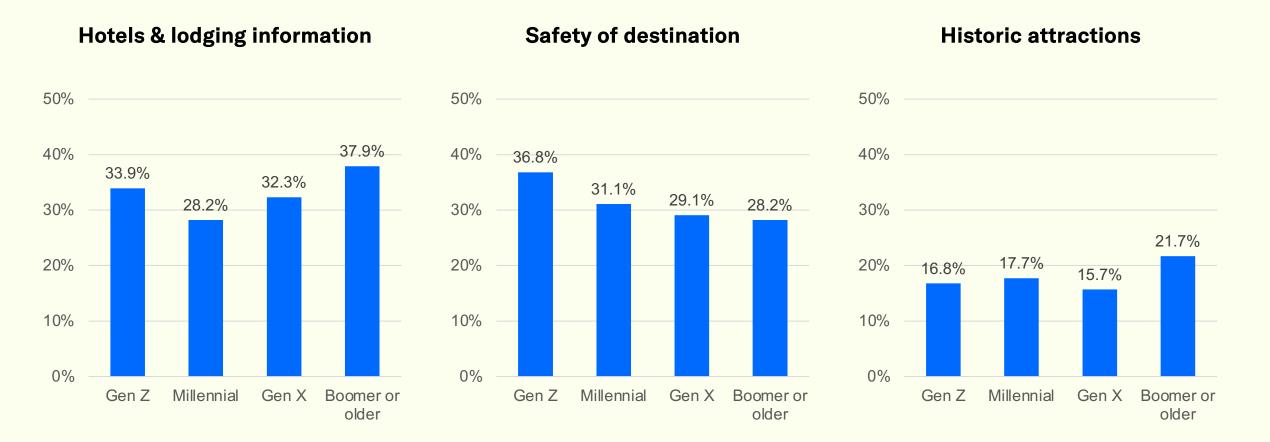
60%

Overall destination costs 39.3% Outdoor activities 34.7% 34.3% Hotel costs Hotels and lodging information 33.2% Ways to experience nature 31.3% Transportation and how to get around 30.9% Safety of destination 29.9% Restaurants and food scene 29.8% Historic attractions 18.5% 17.3% Ease of access - Proximity to my home Festivals and special events 11.4% Events and shows 10.3% Arts and cultural activities 8.6% None of these 14.9% 40%

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a MOUNTAIN DESTINATION OR RESORT?

Gen Z travelers are more likely to state that information about a mountain destination's safety is important to their decision.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a MOUNTAIN DESTINATION OR RESORT?



Desired Experiences

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After visiting friends or relatives, relaxation and de-stressing are the top reasons for travelers' most recent overnight trip.

Visit friends and/or relatives 54.4% Relaxation 42.1% Escape the stress of my daily life 30.9% Self-Care (Enhancing my well-being/happiness) 20.0% 15.7% Enjoy nature/spend time in The Great Outdoors Romance/intimacy with my spouse or partner 15.3% Exploration (desire to see or experience new places) 15.0% Experience the culture of a place(s) 12.7% 10.8% Experiences for my children Serendipity - Enjoy the magic of unexpected experiences 10.0% Education or personal growth 6.4% Bragging rights (Enjoy the social benefits of being seen as well-traveled) 4.3% None of these 4.4% 0% 20% 40% 60%

Reasons for Most Recent Overnight Trip

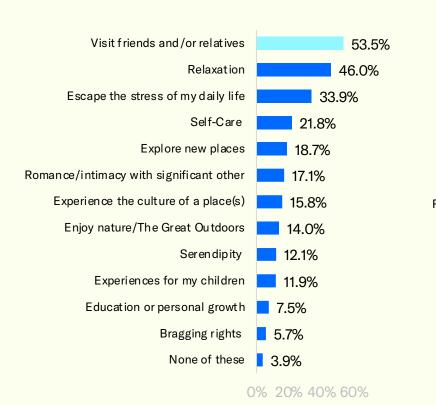
Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in

your decision to take this trip?

Travel motivators vary by destination type, with notable differences between those who visited urban versus outdoor destinations.

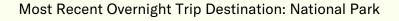
Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

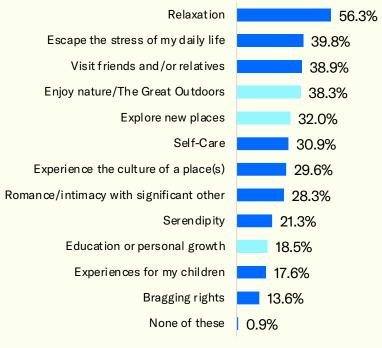
Most Recent Overnight Trip Destination: Mountain



Most Recent Overnight Trip Destination: Urban







0% 20% 40% 60%

^{0% 20% 40% 60%}

Millennials and Gen X are most likely to say they took their most recent overnight trip for experiences for their children.

Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

Escape the stress of my daily life being/happiness) 50% 50% 50% 40% 40% 40% 34.6% 32.6% 31.1% 30% 30% 30% 26.1% 25.2% 22.8% 20.9% 20% 20% 20% 11.2% 10% 10% 10% 3.6% 0% 0% 0% Millennial Gen X Boomer or Gen Z Gen X Boomer or Gen Z Millennial Gen Z older older

Self-care (Enhancing my well-

Experiences for my children

17.3%

Millennial

15.1%

Gen X

1.8%

Boomer or

older

Dining and shopping activities were by far the most important in traveler's decision to take their most recent overnight trip.

	Restaurants and dining	39.6%
Question: Which of the following SPECIFIC	Shopping	28.5%
	Meet and interact with local people	17.2%
TRAVEL ACTIVITIES were important in	Outdoor activities (hiking, biking, fishing, camping, wildlife viewing, etc.)	17.2%
your decision to take this most recent	Take pictures or videos for my social media posts	14.5%
overnight trip?	Visit historical sites or attractions	14.3%
	Attend a festival or special event	13.0%
	Visit State or National Parks	12.0%
	People watching	11.5%
	Visit museum(s) or cultural institutions	11.1%
Attend a professional sporting event (NFL, NBA, WNBA, MLB, etc.)		10.2%
	Attend a musical performance(s)	10.2%
	Children's activities	9.9%
	Attend theater, plays or musicals	8.4%
	Outdoor summer water sports (boating, canoeing, water skiing, etc.)	7.4%
	Visit wineries or breweries	6.9%
	Attend a sporting event (College sports)	6.8%
Attend a sporting event (Youth sport		5.3%
	Outdoor winter sports (Skiing, snowboarding, ice fishing, etc.)	4.4%
	None of these	22.3%

0% 20% 40% 60%

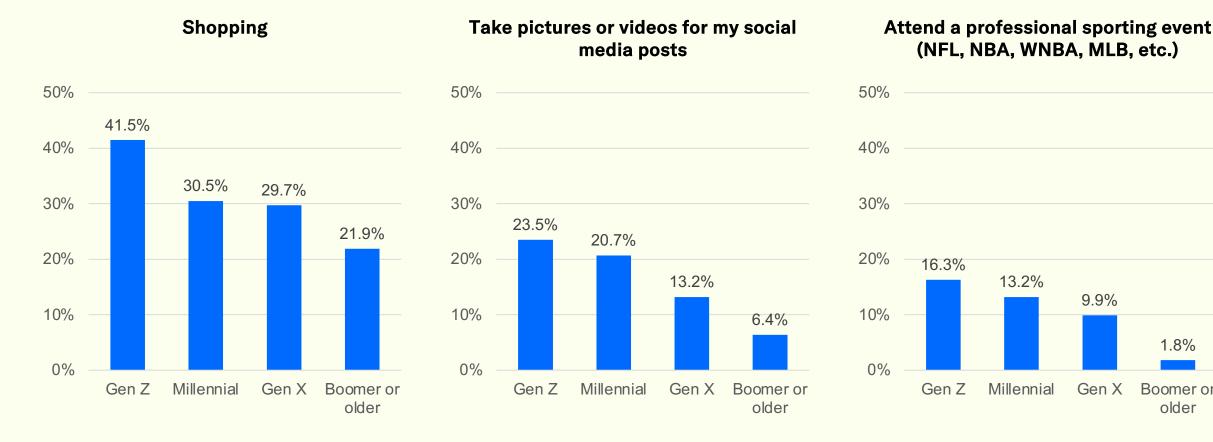
Shopping is especially important for Gen Z, while social media content was a decision driver among both Gen Z and Millennials.

1.8%

Boomer or

older

Question: Which of the following SPECIFIC TRAVEL ACTIVITIES were important in your decision to take this most recent overnight trip?



A Look Back: 2017



Domestic Hotlist % of American Leisure Travelers

LAS VEGAS	19.4%	FRANCE	12.39
NEW YORK CITY	18.4%	ITALY	11.7%
ORLANDO/DISNEY WORLD	12.4%	UNITED KINGDOM	11.4%
FLORIDA	10.1%	MEXICO	10.3%
LOS ANGELES	7.5%	CANADA	9.8%
HAWAII	7.0%	JAPAN	7.3%
CALIFORNIA	6.7%	GERMANY	5.6%
CHICAGO	6.3%	SPAIN	5.3%
SAN FRANCISCO	6.2%	IRELAND	4.5%
MIAMI	6.1%	AUSTRALIA	4.4%
WASHINGTON DC	5.6%	CHINA	3.1%
GRAND CANYON NP	4.8%	JAMAICA	3.1%
SAN DIEGO	4.7%	BAHAMAS	2.7%
YELLOWSTONE NP	4.5%	GREECE	2.0%
NEW ORLEANS	4.1%	BRAZIL	1.8%
MYRTLE BEACH	3.6%	SWEDEN	1.2%
BOSTON	3.3%	HOLLAND	1.2%
ATLANTA	3.1%	NEW ZEALAND	1.1%
SEATTLE	3.0%	SWITZERLAND	1.1%
DENVER	2.7%	INDIA	0.7%



International Hotlist % of American Leisure Travelers

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Florida tops the list of state destinations that travelers have been to in the past 12 months.

Question:

Which of these states have you visited (or traveled within) in the PAST 12 MONTHS and which will you be likely to visit (or travel within) in the NEXT 12 MONTHS?

Florida 32.5% California 25.2% New York 20.3% Texas 19.0% Georgia 17.0% Tennessee 16.2% Pennsylvania 15.2% Arizona 14.9% Nevada 14.1% Illinois 14.0% North Carolina 13.8% Colorado 13.7% South Carolina 12.6% Virginia 12.4% New Jersey 12.1% Ohio 11.9% Alabama 11.9% Maryland 10.7% Michigan 10.2% Massachusetts 10.1%

Visitation in Past 12 Months

Florida also outpaces California and New York as the state American travelers are most likely to visit in the next 12 months.

Question:

Which of these states have you visited (or traveled within) in the PAST 12 MONTHS and which will you be likely to visit (or travel within) in the NEXT 12 MONTHS?

Florida 33.6% California 26.2% New York 23.0% Texas 21.6% Arizona 18.7% Tennessee 17.8% Colorado 17.8% Nevada 17.1% Hawaii 17.0% North Carolina 17.0% Georgia 16.4% Pennsylvania 16.4% South Carolina 15.6% Illinois 15.0% Virginia 14.0% Washington 13.7% Alaska 13.5% New Jersey 13.4% Ohio 13.2% Massachusetts 13.0% 0% 20%

Expected Visitation in Next 12 Months

New York City is the most-visited domestic destination in the past 12 months.

Visitation in Past 12 Months

New York City	20.2%
Las Vegas	16.0%
Los Angeles	15.1%
Orlando, FL	13.7%
Chicago	13.5%
Washington DC	11.1%
Tampa, FL	10.6%
Dallas	10.4%
San Diego	10.0%
Nashville	9.8%
Phoenix	9.0%
Seattle	8.9%
Denver	8.8%
Miami	8.6%
Philadelphia	8.6%
Atlanta	8.6%
San Francisco	8.3%
Houston	8.0%
Boston	7.7%
Charleston, SC	7.1%

Question:

Which of these destinations have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?

0%

Similarly, travelers are most likely to say they will visit New York City in the next year, followed by Las Vegas.

Question:

Which of these destinations have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?

New York City	24.4%
Las Vegas	21.7%
Orlando, FL	18.9%
Los Angeles	18.2%
Chicago	16.8%
Washington DC	15.3%
Tampa, FL	14.2%
Miami	13.9%
Nashville	13.9%
San Diego	13.7%
Dallas	13.6%
Phoenix	13.3%
New Orleans	13.2%
San Francisco	13.1%
Seattle	12.8%
Philadelphia	12.4%
Boston	12.4%
Denver	12.2%
Houston	12.1%
Charleston, SC	11.9%

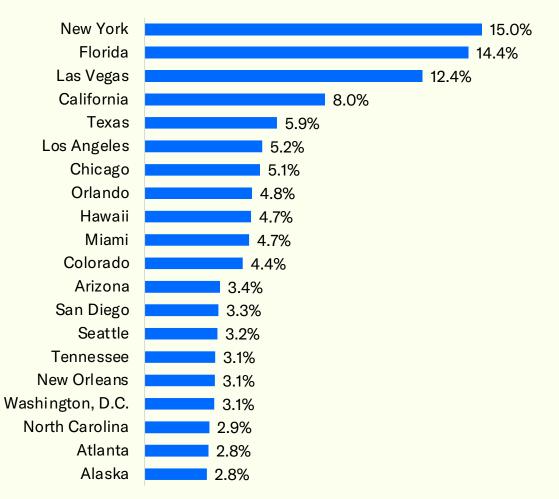
Expected Visitation in Next 12 Months

40%

Unsurprisingly, New York and Florida were the top mentioned domestic destinations that travelers most <u>want</u> to visit in the next year.

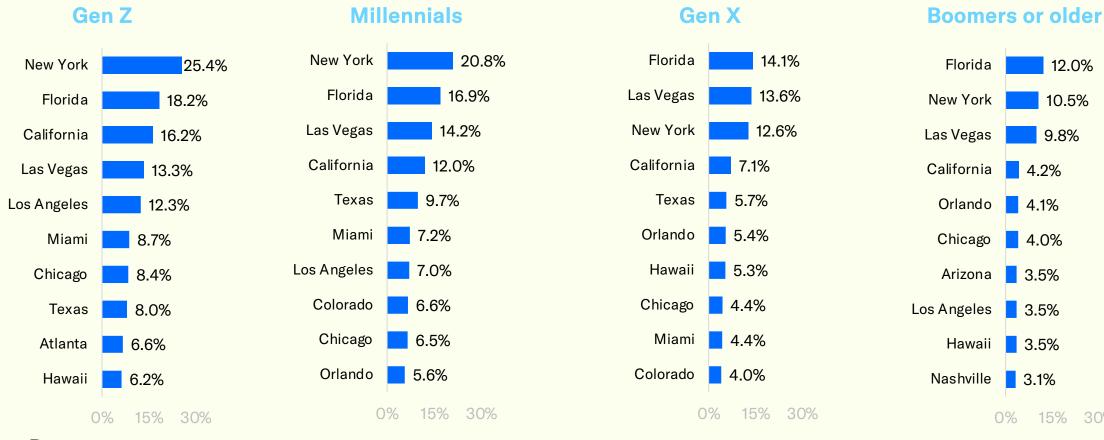
Question:

Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)



New York is the most mentioned domestic destination for younger travelers, while Florida tops the list for Gen X and Boomers.

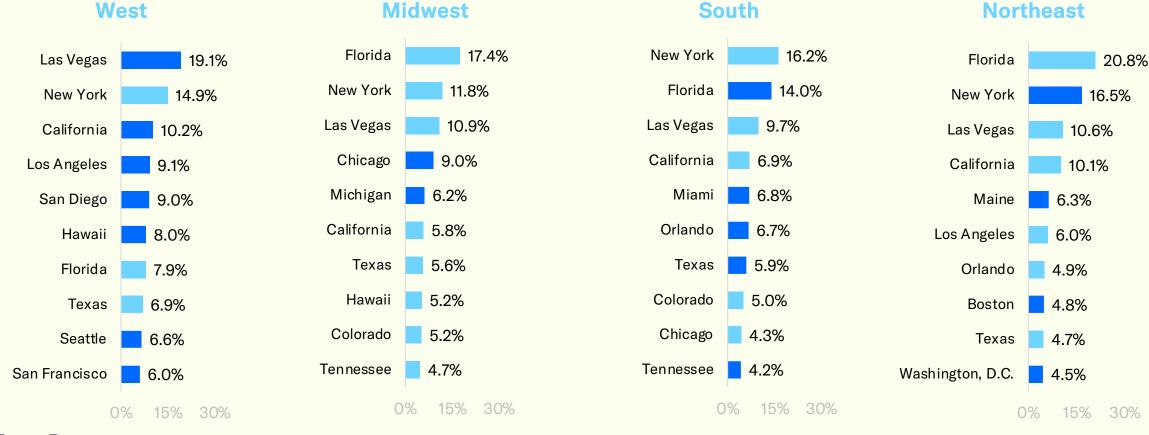
Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)



Hotlist by Generation

Midwest and Northeast residents are more to say destinations outside of their home region on their domestic hotlist.

Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)



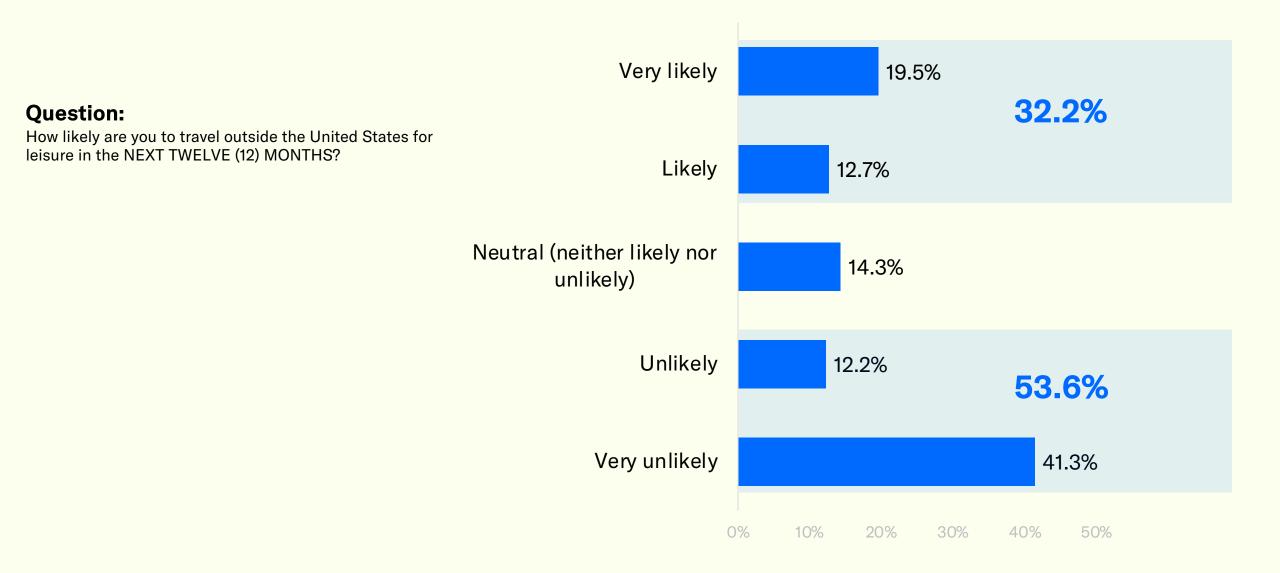
Hotlist by Region

Future Partners The State of the American Traveler, January 2024

International jois por

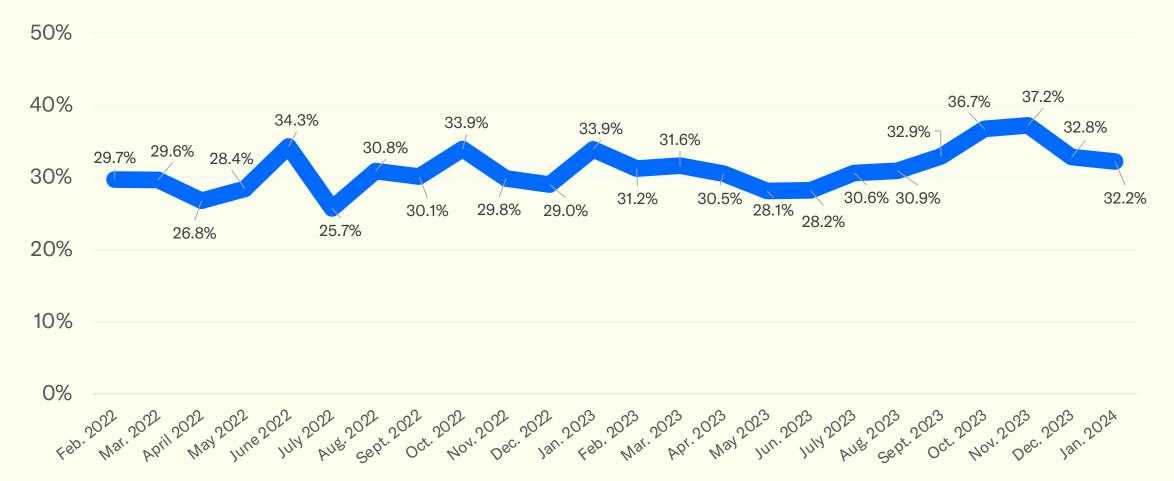
Future Partners The State of the American Traveler

One-third of all travelers are likely to travel abroad in 2024.



Despite a slight drop after a peak in Fall 2023, current international travel expectations still outpace the first half of 2023.

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

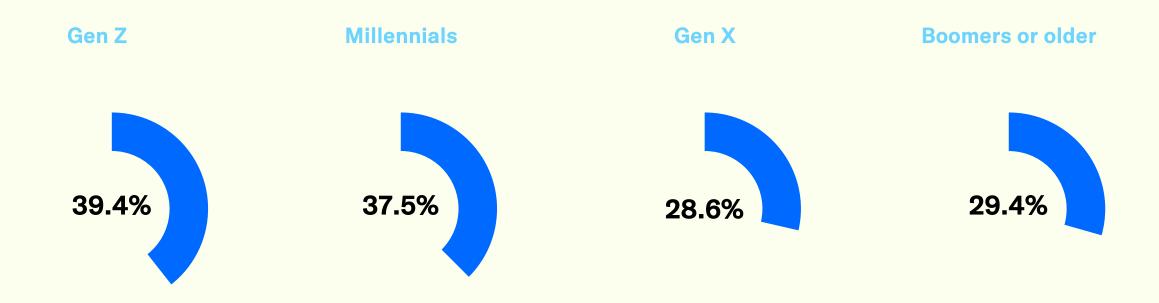


Future Partners The State of the American Traveler, January 2024

International travel likelihood in 2024 is highest among Gen Z and Millennial travelers but still strong among GenX and Boomers

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

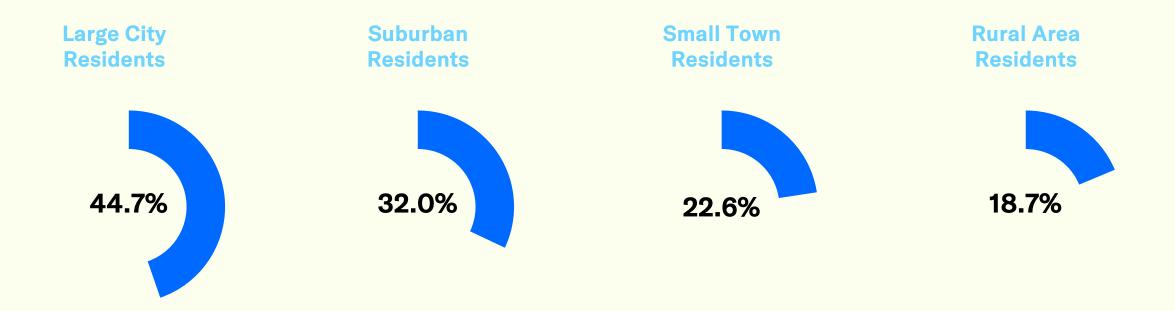
Top 2 Box Agreement by Generation



Large city residents are most likely to say they will travel abroad in the next year.

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

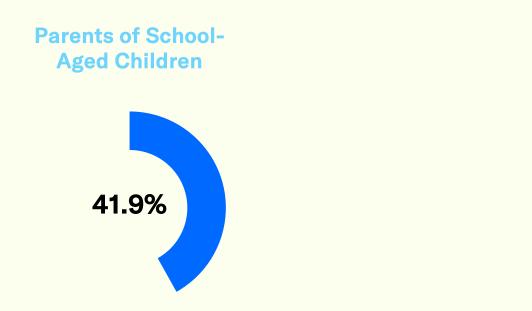
Top 2 Box Agreement by Type of Residence



Having school-aged children is not a deterrent to traveling overseas – quite the opposite!

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

Top 2 Box Agreement by Family Status



All Other



Likely international travelers are much more likely to be interested in wellness, wine, and theater.

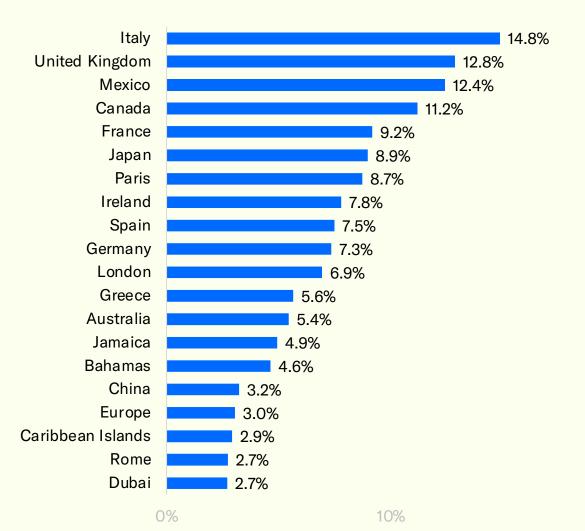
Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

	Food and cuisine	46.4%			
	Visiting historical sites and attractions	+0.570			
	Musical concerts (pop, rock, hip hop, alternative, modern, etc.)		38.8% ^{45.5}	%	
	Shopping		32.2%		
	Enjoying theme or amusement parks	33.4% 42.0%			
	Attending professional sports (large-venue, like NFL or MLB)	30.5%			
	Fitness, health and wellness (exercise, spas, yoga, organic foods, etc.)		20.4%	+20.2pp	
	Musical concerts (classical, symphonies, etc.)		27.4%		
	Music festivals (multi-day events)		29.8%		
	Wine		20.0%	+19.5pp	
	Theater or plays, (on or off Broadway productions)		21.5%	+15.4pp	
	Art museums		22.5%		
	Hiking (day hikes)		23.7%	-	mational Travelers
	Fashion		16.1%	All Other	
	Camping		30.0% 26.4%		
Future P	artners The State of the American Traveler, January 2024	0%	20% 40%	60%	30%

Italy is the most mentioned foreign destination that travelers want to visit in the next year.

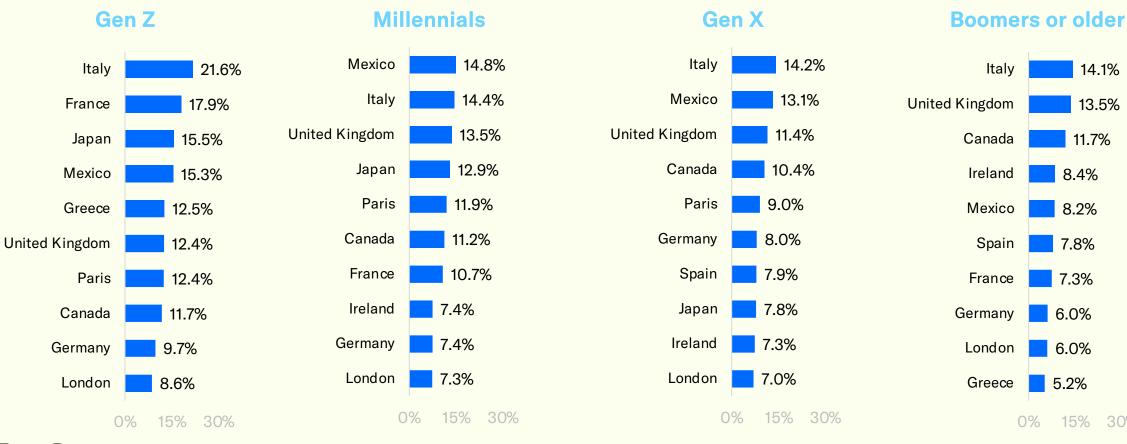
Question:

Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)



Italy dominates the international hotlist across all destinations, though Millennials were more likely to mention Mexico.

Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)

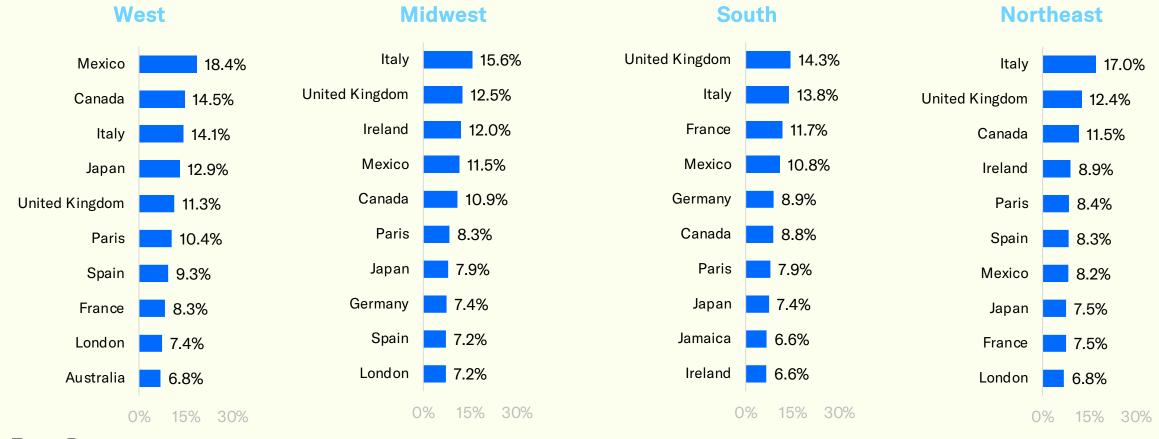


Hotlist by Generation

Future Partners The State of the American Traveler, January 2024

Italy and the UK top the international hot list for all regions except for the West, which cites Mexico and Canada first.

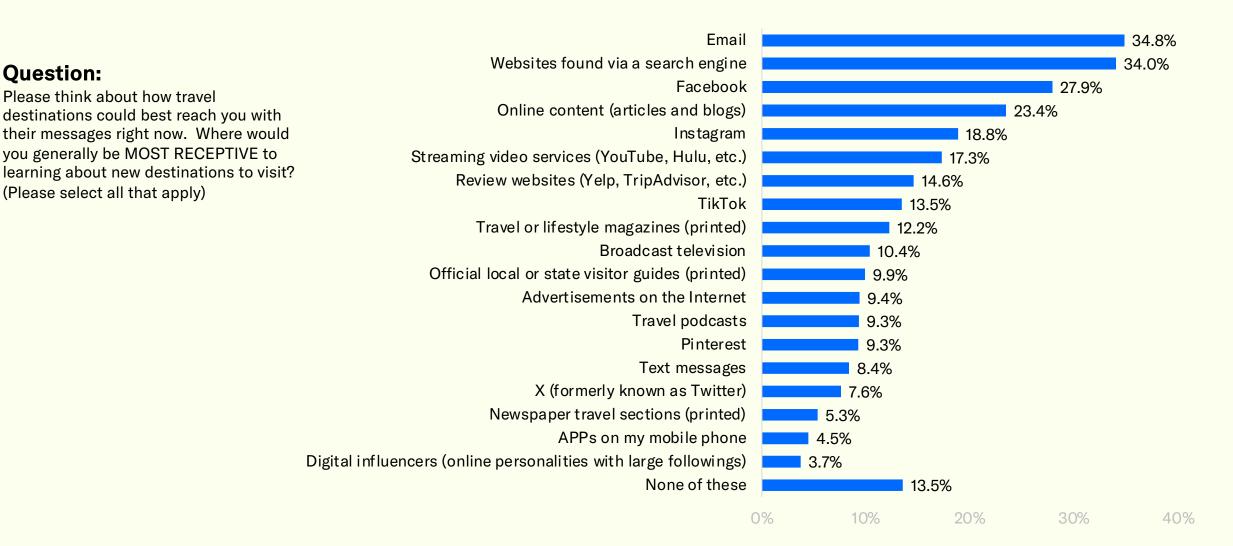
Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)



Hotlist by Region



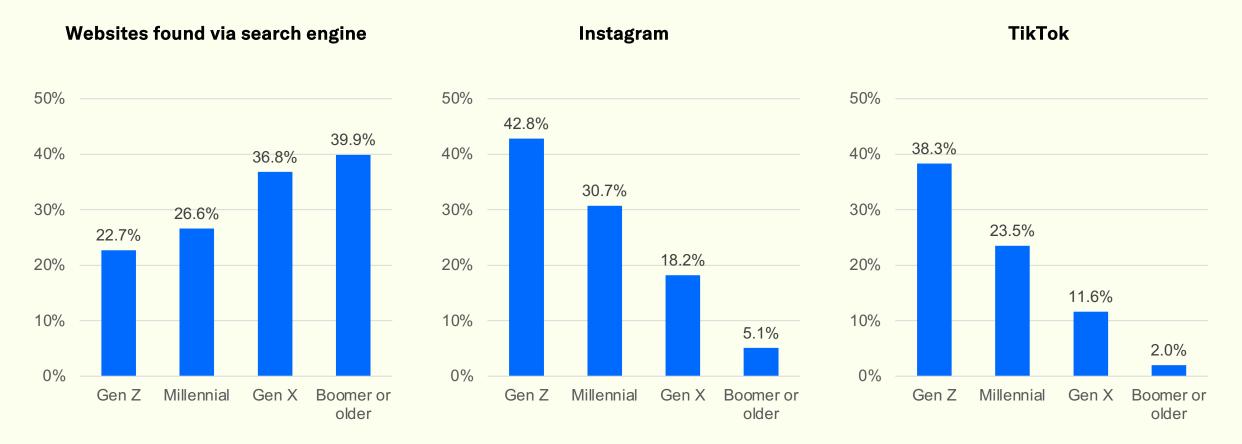
Across all travelers, email and websites found via search engine are the top travel marketing channels.



Older generations are more reachable via websites, but Gen Z are much more likely to be receptive to marketing on Instagram and TikTok.

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

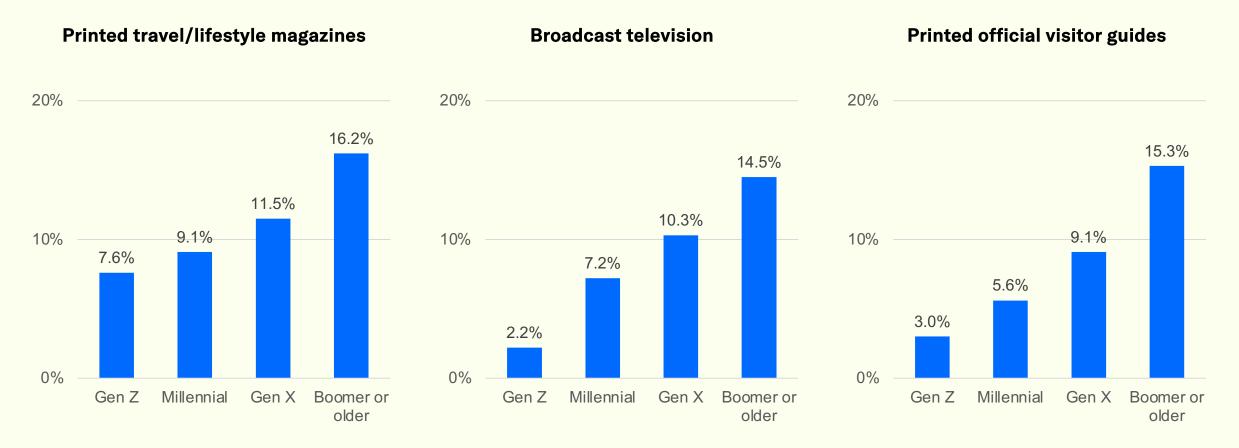
Key Digital Channels by Generation



For traditional channels, Boomers are most receptive to print and broadcast television compared to younger travelers.

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

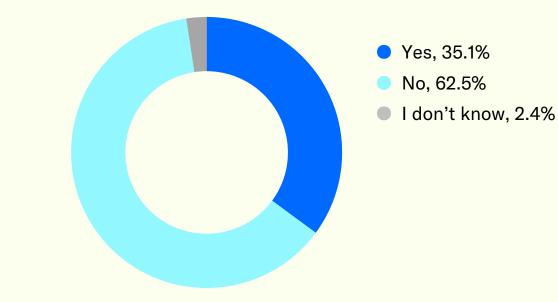
Key Traditional Channels by Generation



Just over one-third of all travelers have used online video to plan travel in the last year.

Question:

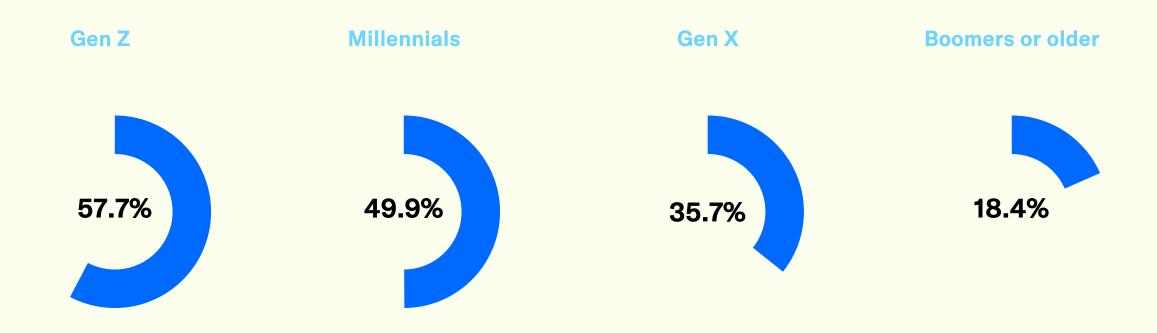
In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video, TikTok or Google Video) to plan any travel?



The majority of Gen Z and nearly half of Millennial travelers have used online video for travel planning in the past year.

Question: In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video, TikTok or Google Video) to plan any travel?

% Yes by Generation



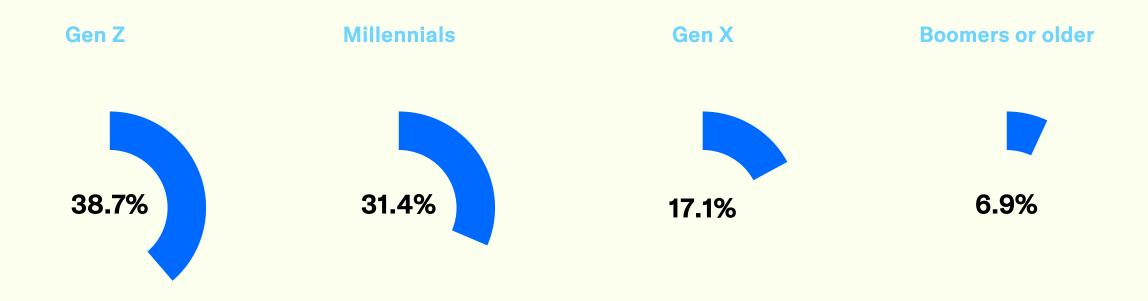
About one in five travelers always or usually use online video to plan their travel.

Question: How often do you use ONLINE VIDEOS to plan your travel? (Select one)	Always – I use videos for every trip I take	5.8% 19.1%
	Usually – I use videos for most of my trips	13.3%
	Sometimes – I use videos, but not usually	26.1%
	Rarely – I seldom use videos to plan my travel	22.1% 54.8%
	Never - I do not use videos for trip planning	32.7%
	C	0% 10% 20% 30% 40%

Frequent online video usage for travel planning was highest among Gen Z, followed by Millennials.

Question: How often do you use ONLINE VIDEOS to plan your travel? (Select one)

% Top 2 Box (Always or Usually) by Generation



Travel Planning & Media Consumption Behaviors by Destination Type

City/Urban Destination Visitors

- Less likely to use digital influencers for trip planning
- More likely to be passionate about theater
- More likely to use reviews websites like Yelp for trip planning
- Rely less overall on media resources for trip planning
- Likely to have taken a trip specifically to attend a professional sports event
- Over half are Amazon Prime subscribers likelier to be HBO Max subscribers
- Use major airline carriers and hotel brands

Small Town/Rural Visitors

- Well-reached by email campaigns and SEO
- Less likely to travel by air
- More likely to have recently stayed in a tribal casino hotel/resort
- Less likely to use credit card rewards/points for travel purchases and less likely to be members of travel loyalty programs
- Less likely to use ride-sharing services like Uber/Lyft
- Self-help podcast content
- AARP the Magazine
- Least likely to use DMO resources

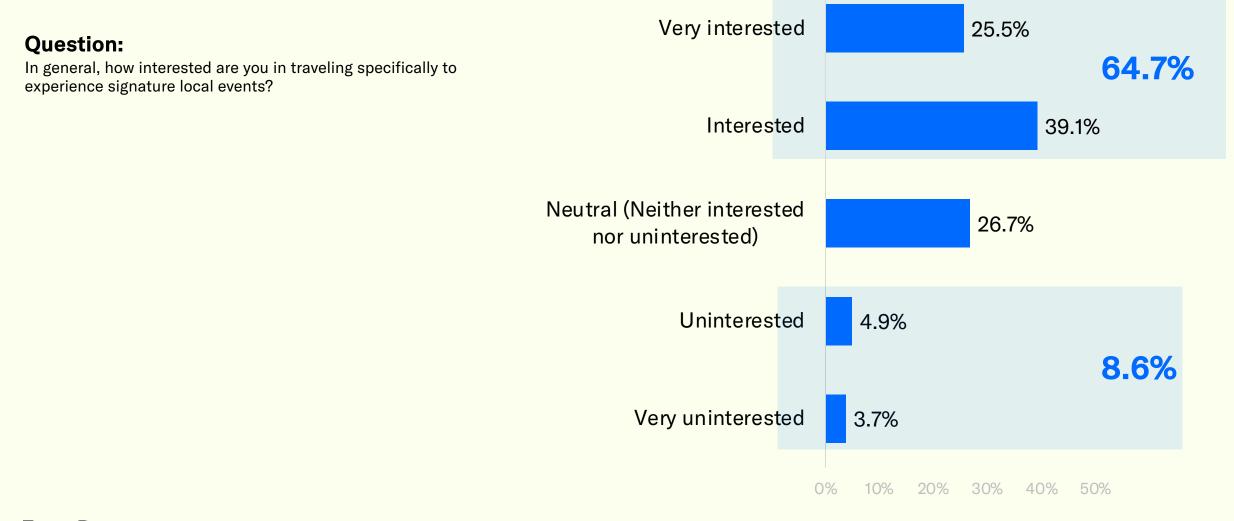
Mountain & National Park Destination Visitors

- More likely to use digital influencers
- More likely to frequently use online video for trip planning
- More passionate about food, historical sites, music concerts, photography and, of course, outdoor-type activities
- Well-reached by email and social campaigns
- Likelier to have used offline resources for travel planning, especially printed travel magazines
- Likelier to consume CNN and People Magazine; Health & Fitness podcasts; Netflix and Disney+
- Smaller/Regional air carriers
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Two-thirds of all travelers are interested in traveling to experience a signature local event.

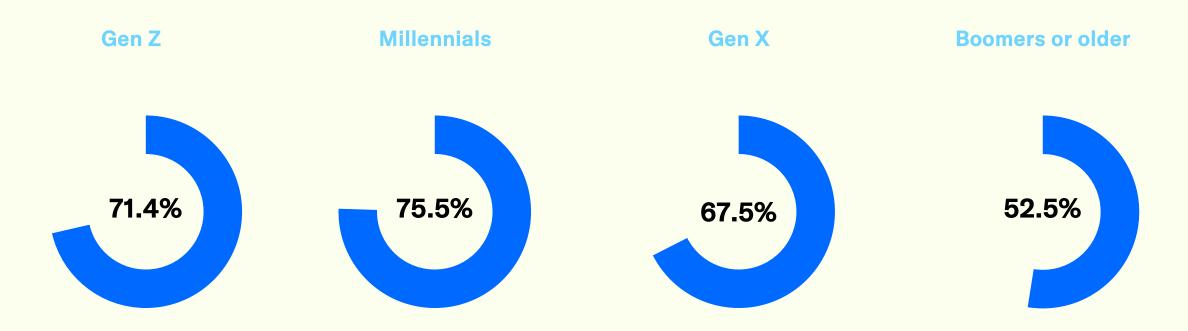


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Interest is highest among Millennials, followed closely by Gen Z.

Question: In general, how interested are you in traveling specifically to experience signature local events?

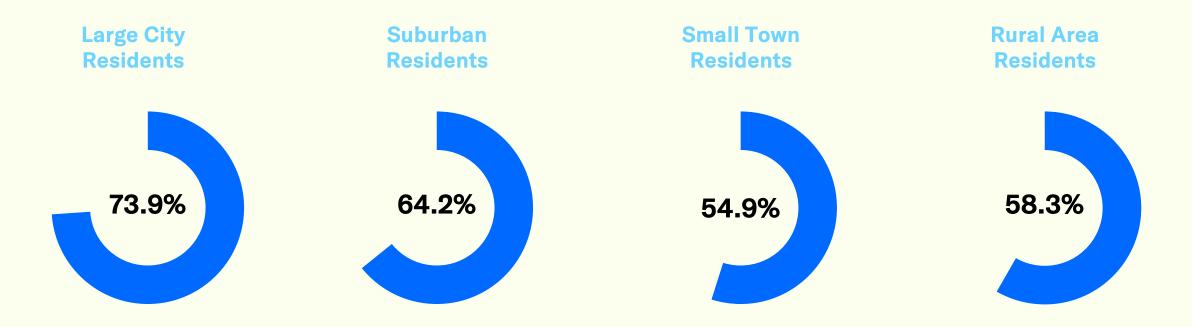
Top 2 Box Agreement by Generation



Urban residents are much more likely to say they will travel specifically to experience a signature local event.

Question: In general, how interested are you in traveling specifically to experience signature local events?

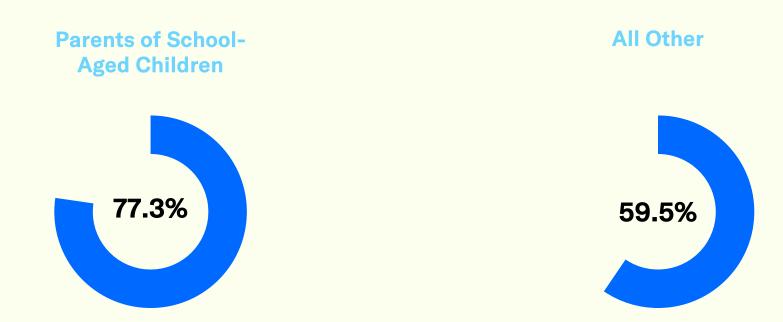
Top 2 Box Agreement by Type of Residence



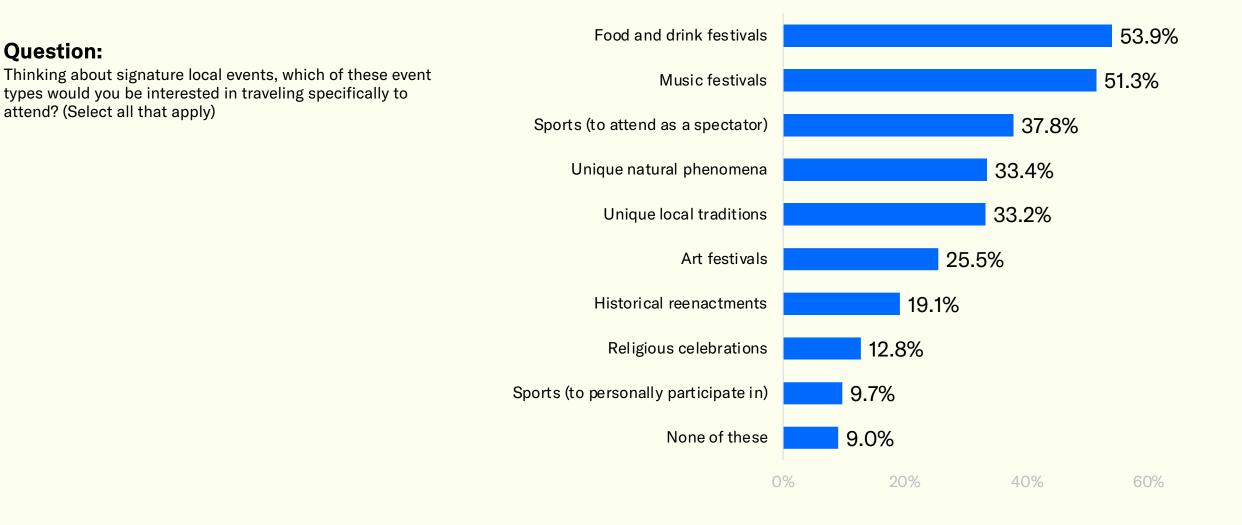
Parents of school-aged children are much more likely than other travelers to say they will travel specifically for a signature local event.

Question: In general, how interested are you in traveling specifically to experience signature local events?

Top 2 Box Agreement by Family Status



The majority of travelers said they would travel specifically for food and drink and/or music festivals.



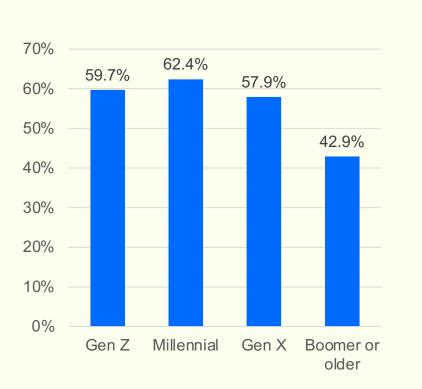
Parents of school-aged children are significantly more likely to be interested in traveling for food and drink festivals or sporting events

Question: Thinking about signature local events, which of these event types would you be interested in traveling specifically to attend? (Select all that apply)	Food and drink Festivals		60.7 51.1%	% +9.6pp	
	Music festivals		55.2% 49.8%		
	Sports (to attend as a spectator)	35.6	42.9% %	+7.2pp	
	Unique natural phenomena	37.1 31.9%	%		
	Unique local traditions	31.3% 34.09	%		
	Art festivals	25.4% 25.5%			
	Historical reenactments	23.8% 17.2%	Parents to s	chool-aged child	dren
	Religious celebrations	17.2% 10.9%	All Other		
	Sports (to personally participate in)	16.9% 6.7%		-10.2pp	
	None of these	6.2% 10.2%			
	09	% 20% 40%	60%	80%	

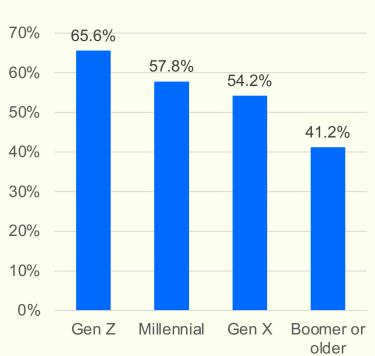
Gen Z travelers are more likely to be interested in music festivals, but less likely to be interested in attending a sporting event as a spectator.

Question: Thinking about signature local events, which of these event types would you be interested in traveling specifically to attend? (Select all that apply)

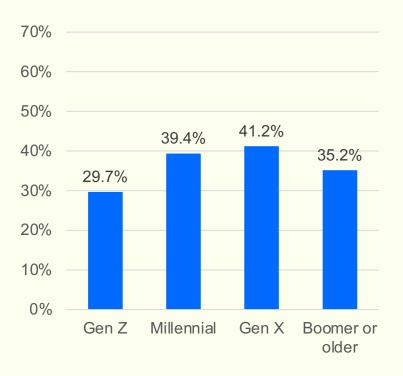
Music festivals



Food and drink festivals







Thank You!

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SIGNATURE **LOCAL EVENTS**









SIX CHARACTERISTICS OF SUCCESSFUL Signature Local Events

- 1. Seasonal Superstar (in off-season)
- 2. Local Hero (supportive host community)
- **3.** Visitor Draw
- **4.** Authentic Story
- **5.** Time Tested
- 6. Unlikely Winner

» More: www.MilesPartnership.com/how-we-think



SIGNATURE LOCAL EVENTS

Hall of Fame

Gasparilla Pirate Festival



SIGNATURE LOCAL EVENTS



Hall of Fame

Albuquerque International Balloon Fiesta

Panelist Discussion

Additional Resources

Blogs.

- The Power & Potential of Signature Local Events
- U.S. Hall of Fame: Signature Events



UPCOMING QUARTERLY EDITIONS

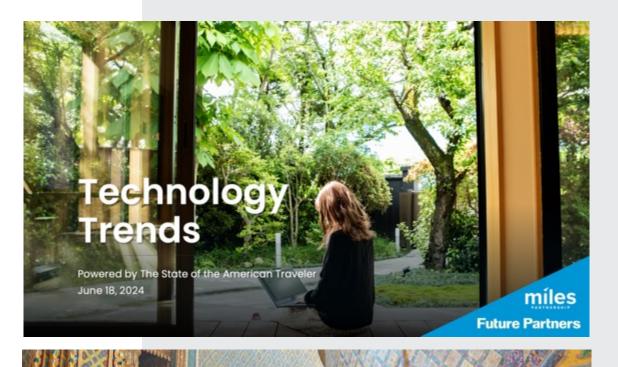
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