

THE STATE OF THE AMERICAN TRAVELER:

DESTINATION MANAGEMENT EDITION

NOVEMBER 18, 2021

Destination  Analysts

miles
PARTNERSHIP

With You



Chris Adams
*Head of Research & Insights
Miles Partnership*



Kimberly Vince-Cruz
*Vice President
Destination Analysts*



Signe Jungersted
*CEO & Founding Partner
Group NAO*

THE STATE OF THE AMERICAN TRAVELER: DESTINATION MANAGEMENT EDITION

Research, slides and other resources will be available at

www.milespartnership.com/SAT

www.destinationanalysts.com

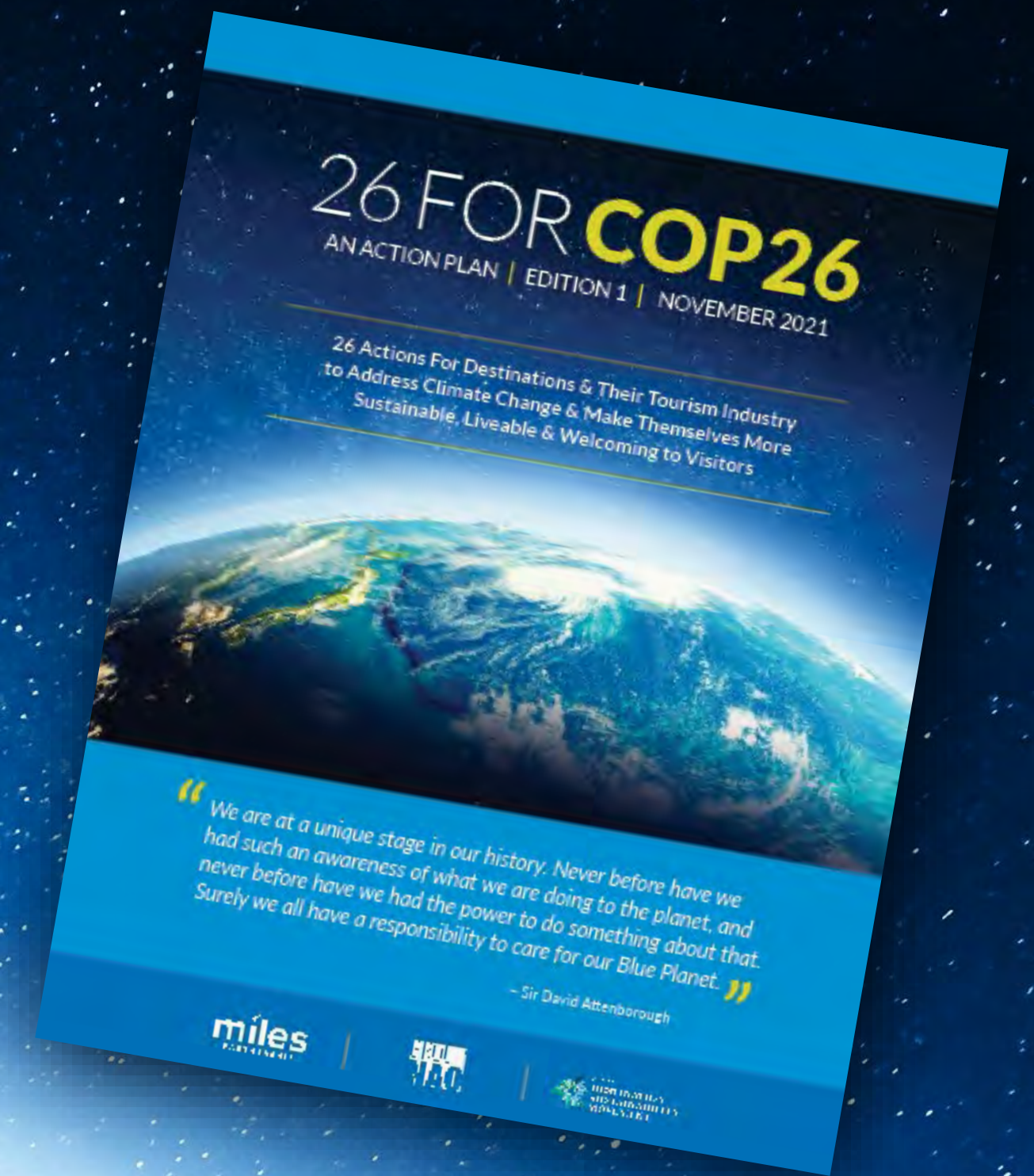
Check out the Online Insights Dashboard,
Available Now!



26 for COP26

26 Actions For Destinations & Their Tourism Industry to Address Climate Change & Make Themselves More Sustainable, Liveable & Welcoming to Visitors

<https://www.milespartnership.com/26forCOP26>



Part One of Two,
Available Tomorrow!



Agenda

1. Current Traveler Sentiment
2. Destination Management Edition Research
3. 26 for COP26
4. DMOcracy
5. Additional Resources
6. Q&A

THE STATE OF THE AMERICAN TRAVELER

Destination Management Edition

November 18, 2021

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 2,000 American leisure travelers**
- **Examines traveler sentiment, motivations & behaviors**
- **Quarterly 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

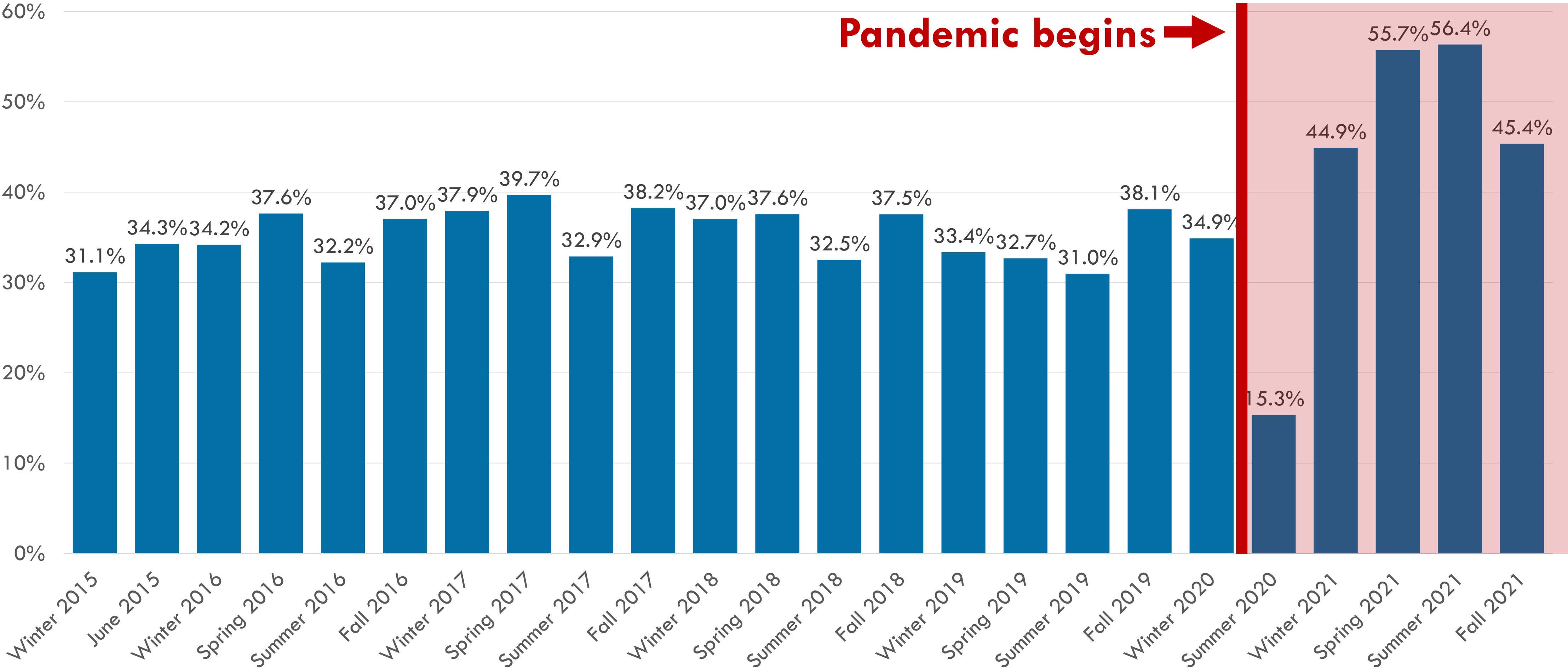
Q: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?

45.4%

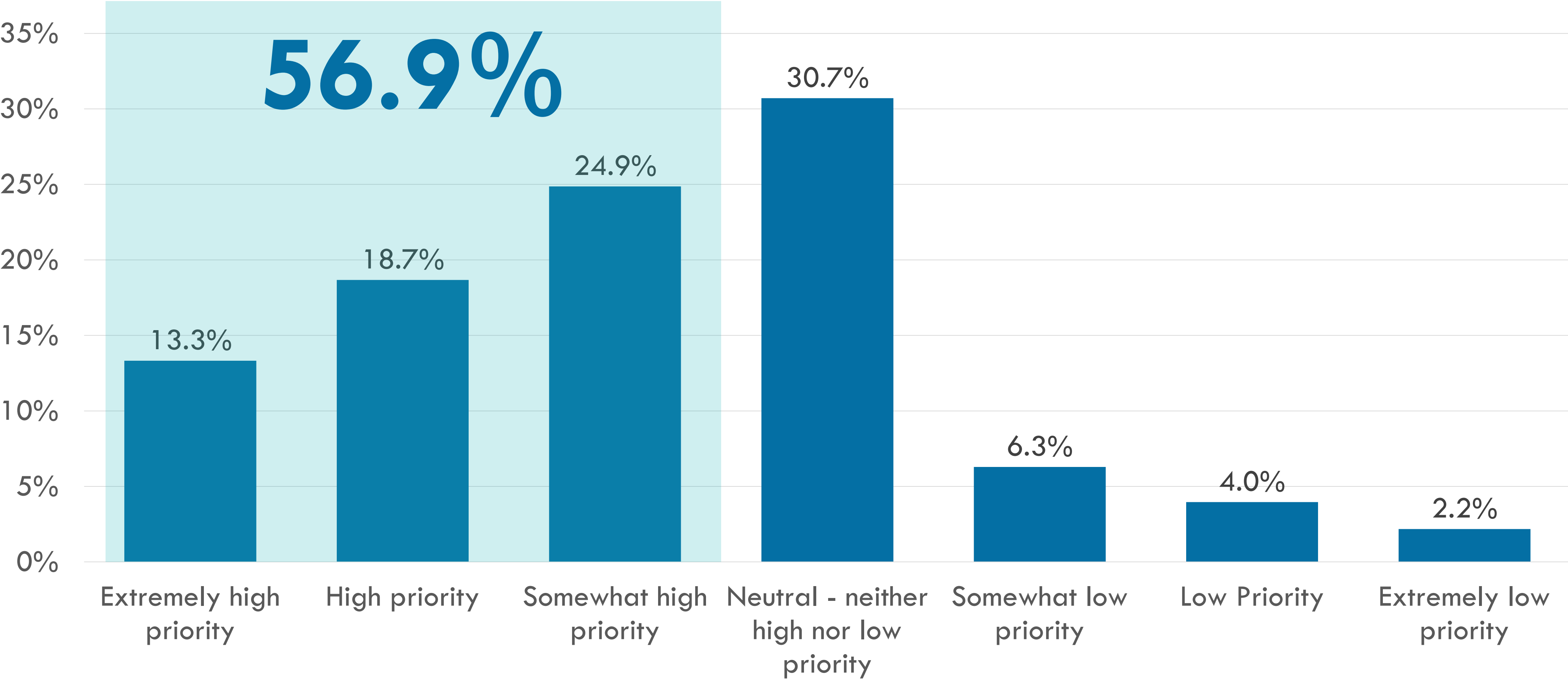
Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

45.6%

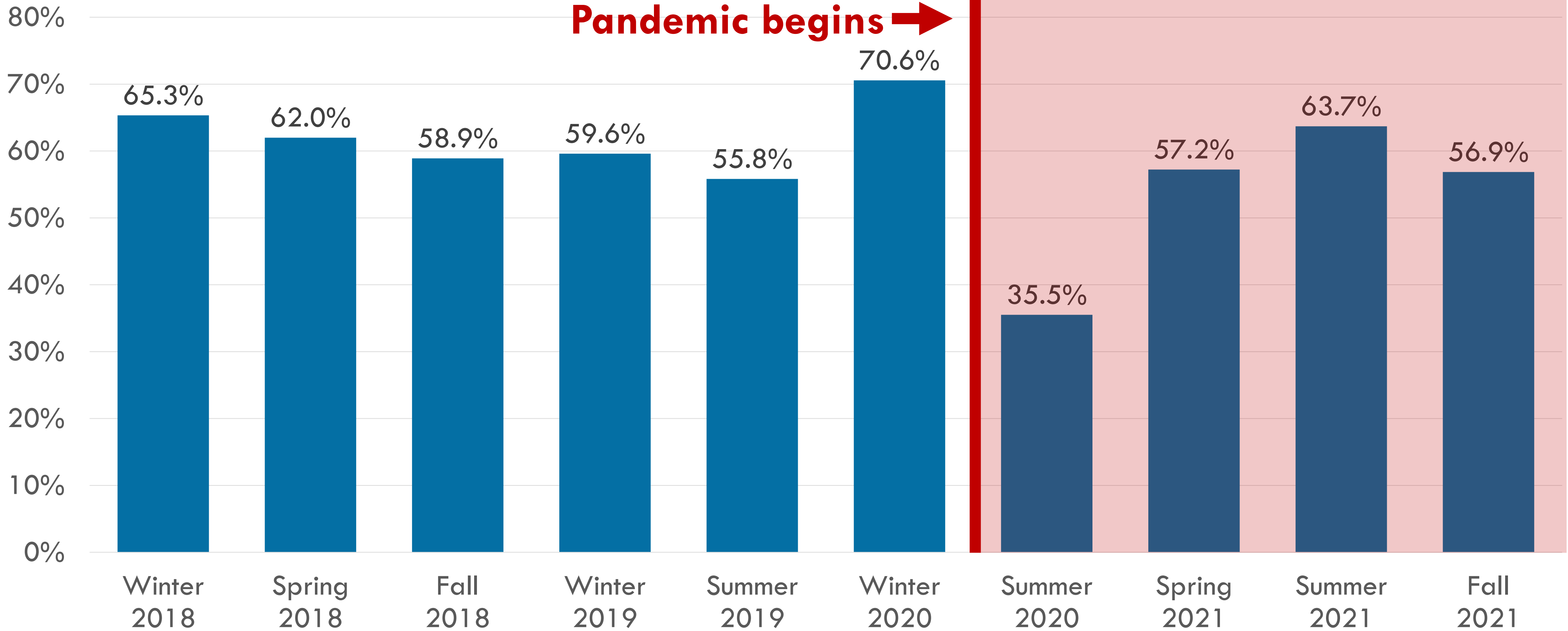
LEISURE TRAVEL OPTIMISM: EXPECTED TRIPS



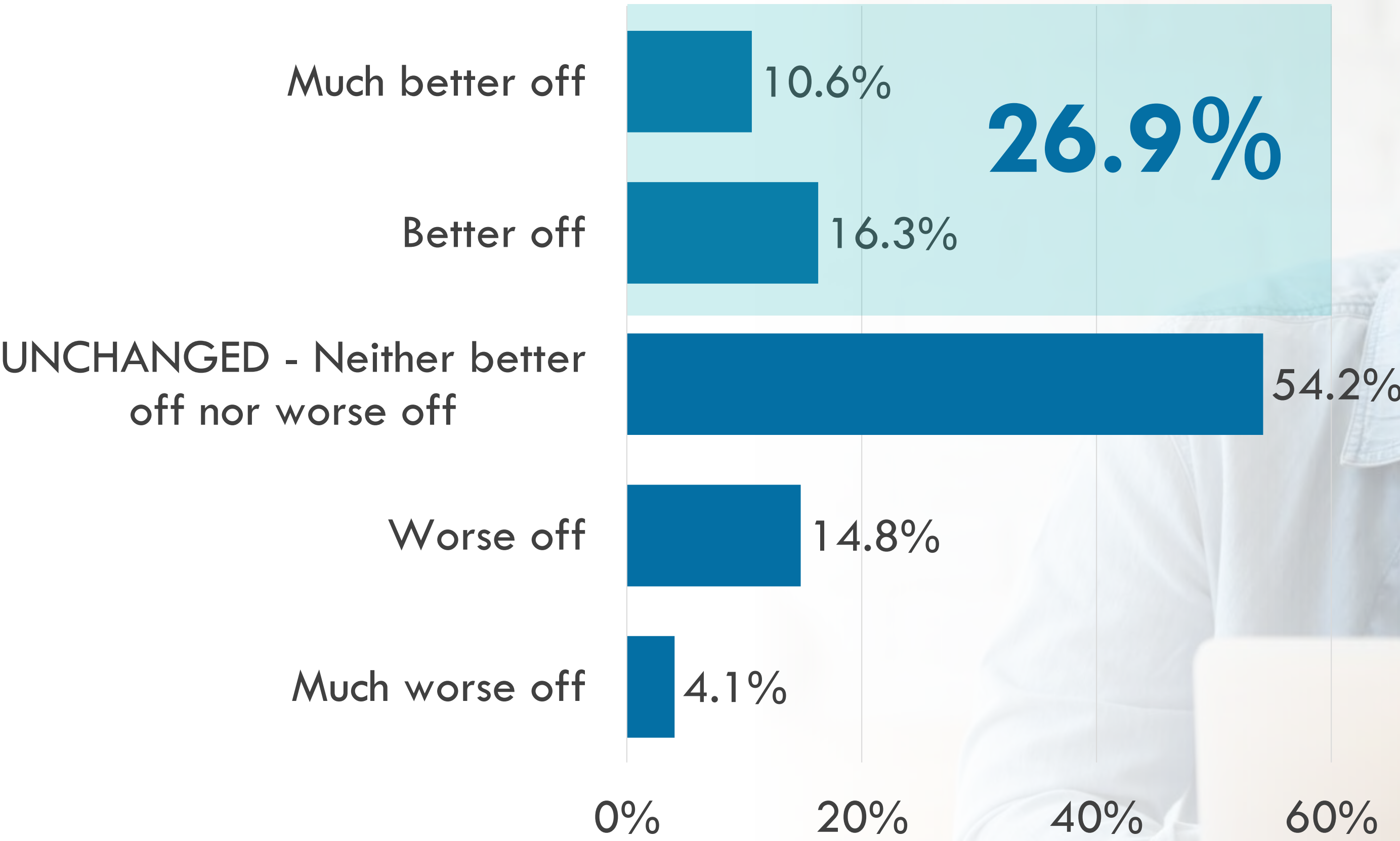
LEISURE TRAVEL AS A BUDGET PRIORITY, FALL 2021



LEISURE TRAVEL AS A BUDGET PRIORITY

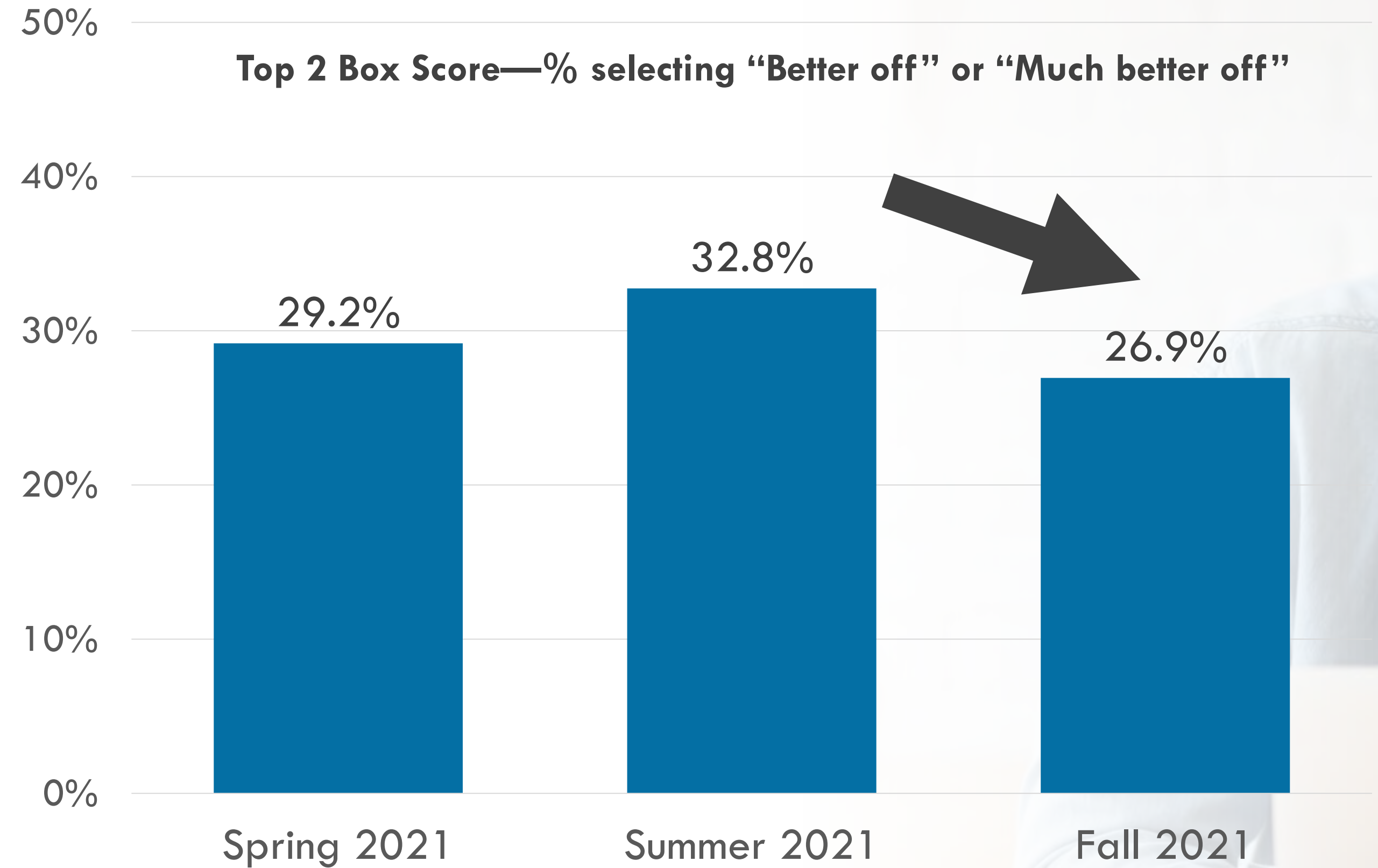


CURRENT HOUSEHOLD FINANCIAL SITUATION



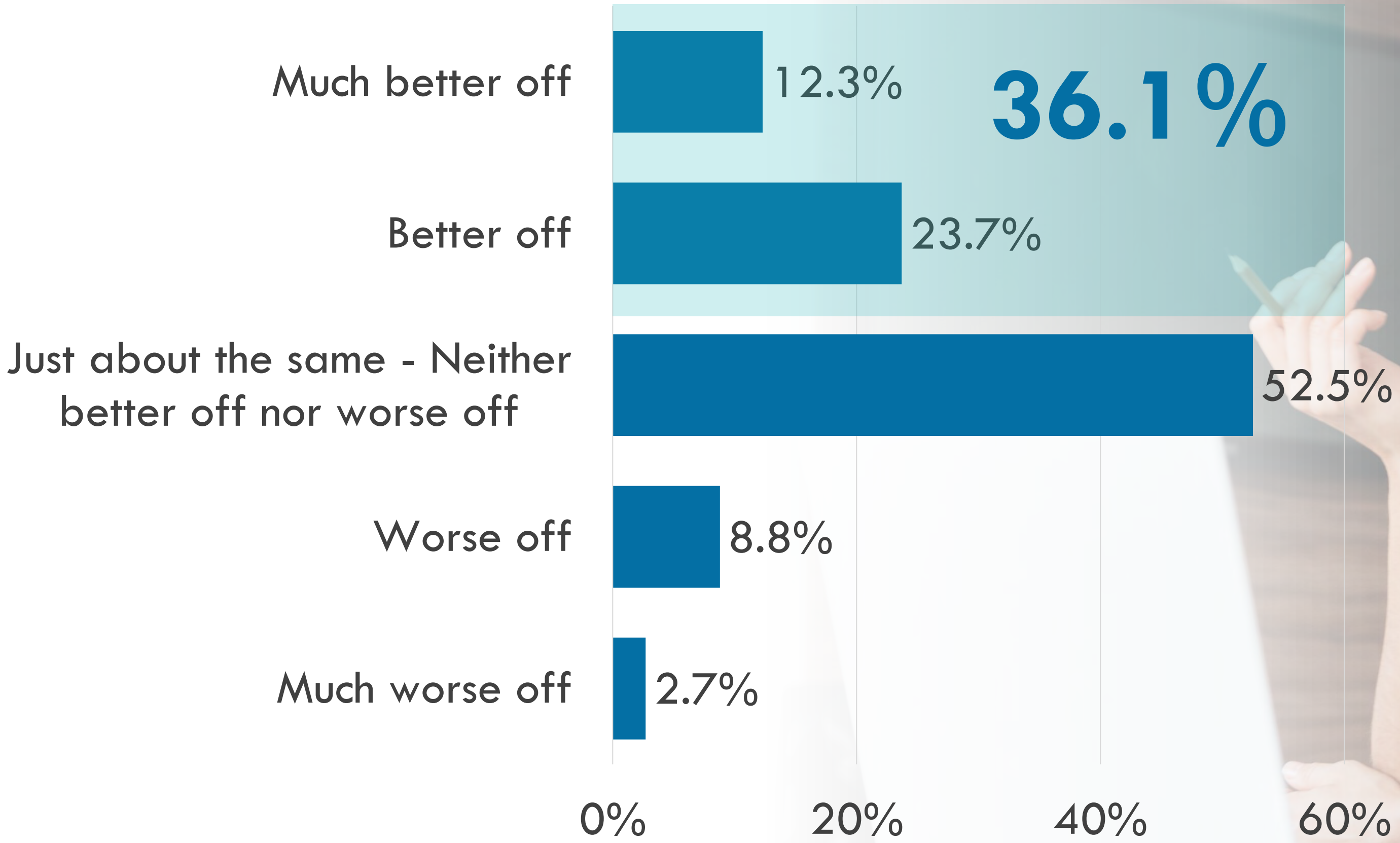
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)

CURRENT HOUSEHOLD FINANCIAL SITUATION



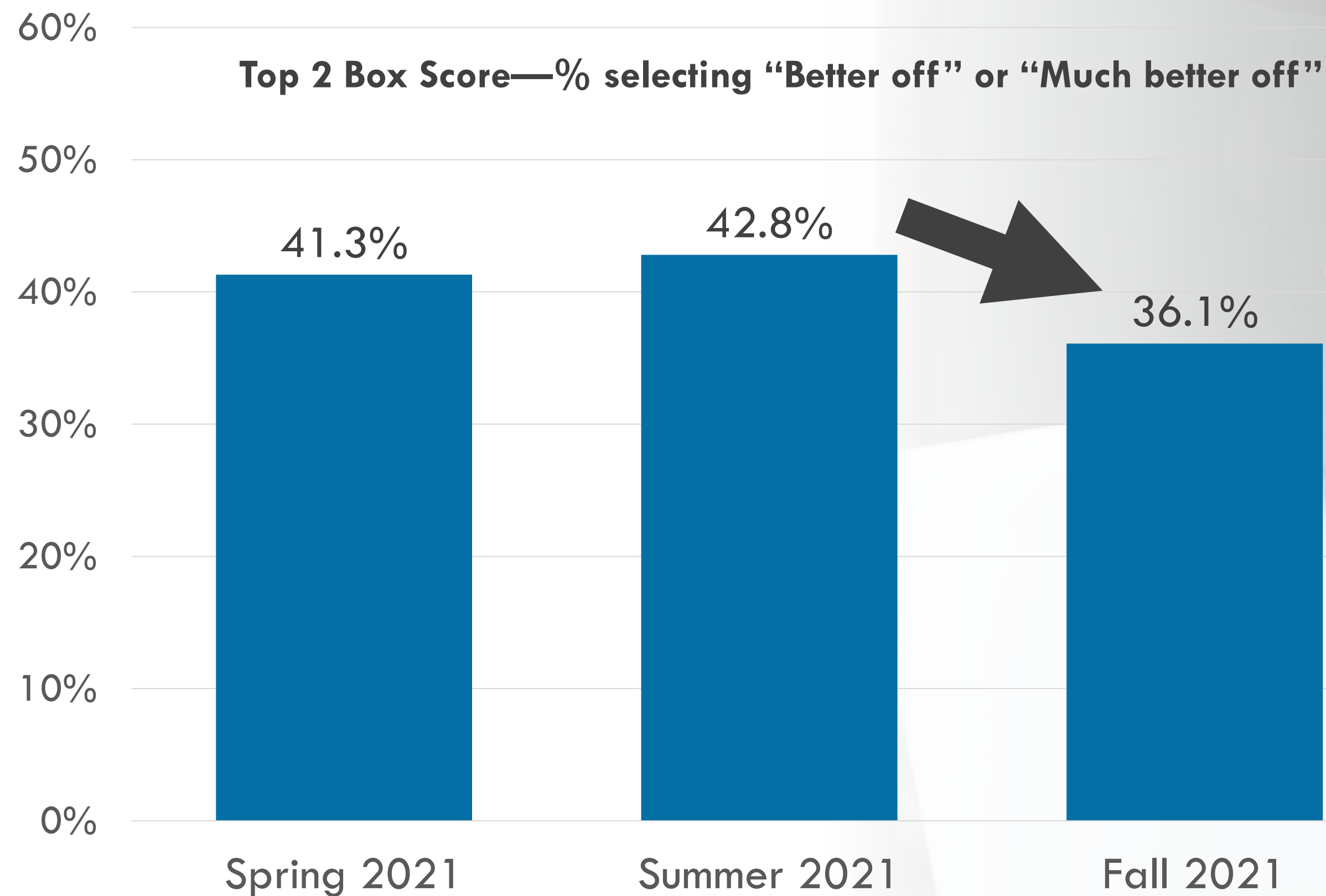
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)

HOUSEHOLD FINANCIAL SITUATION: EXPECTATIONS



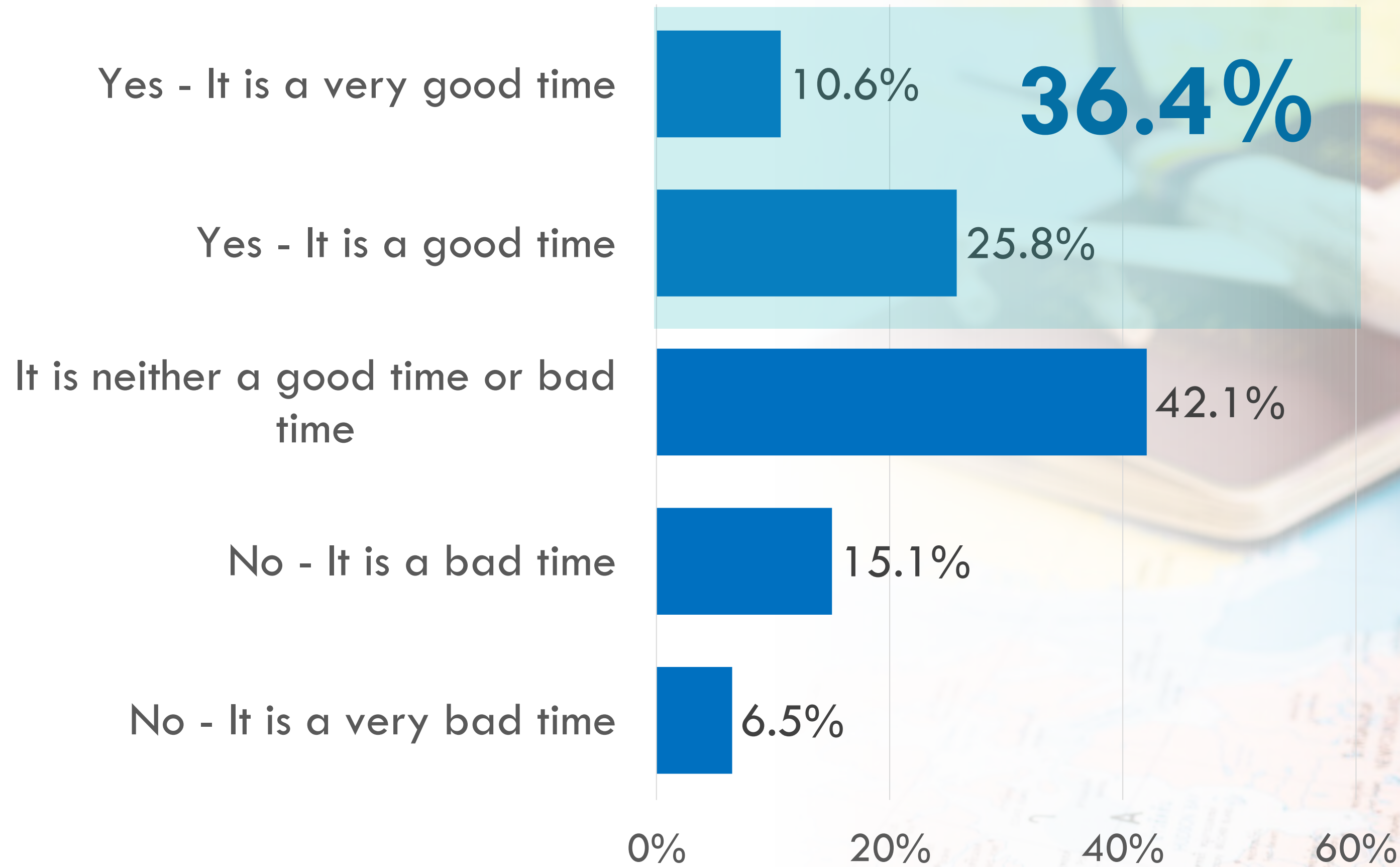
Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?)

HOUSEHOLD FINANCIAL SITUATION: EXPECTATIONS



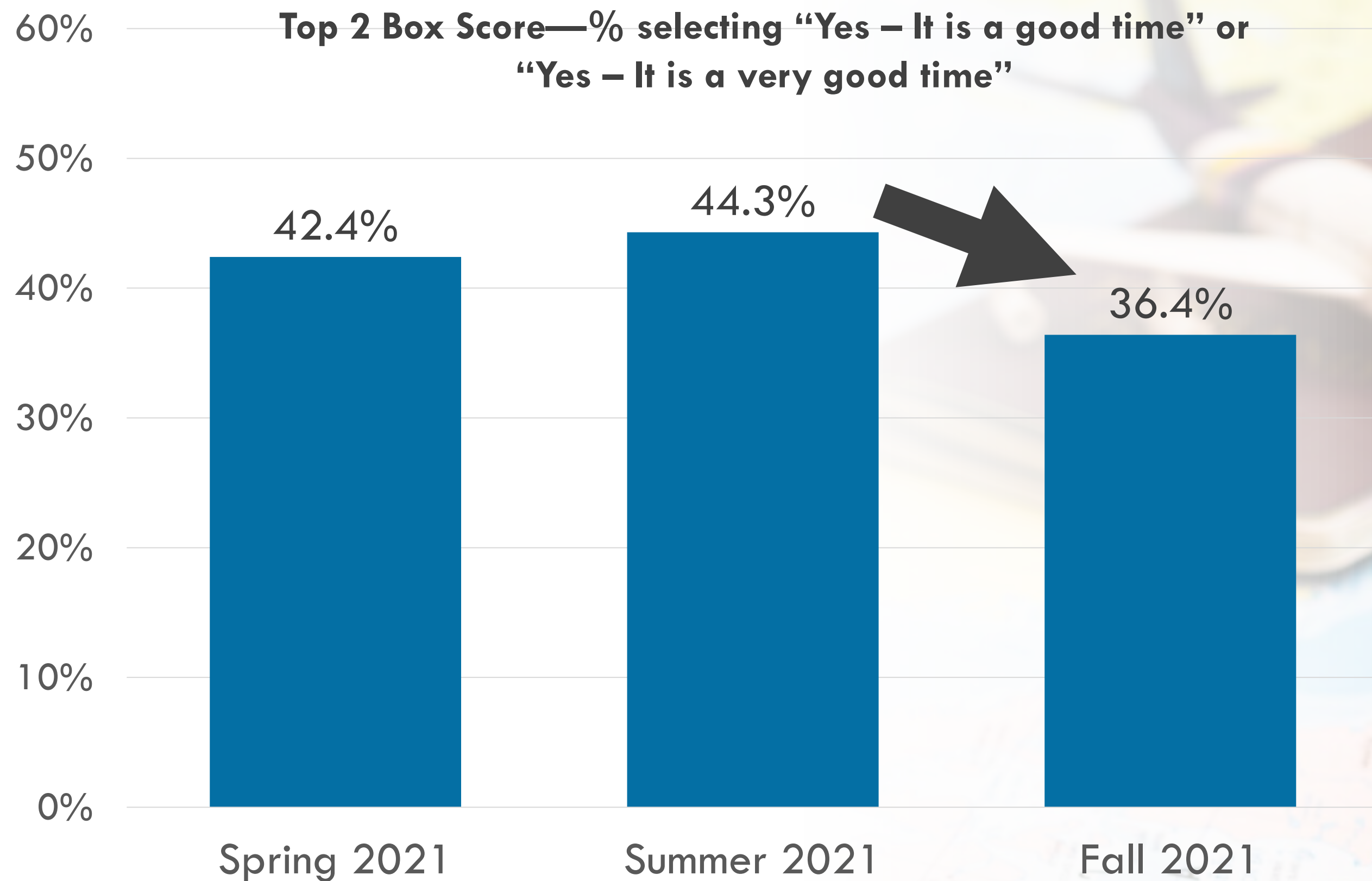
Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?)

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?



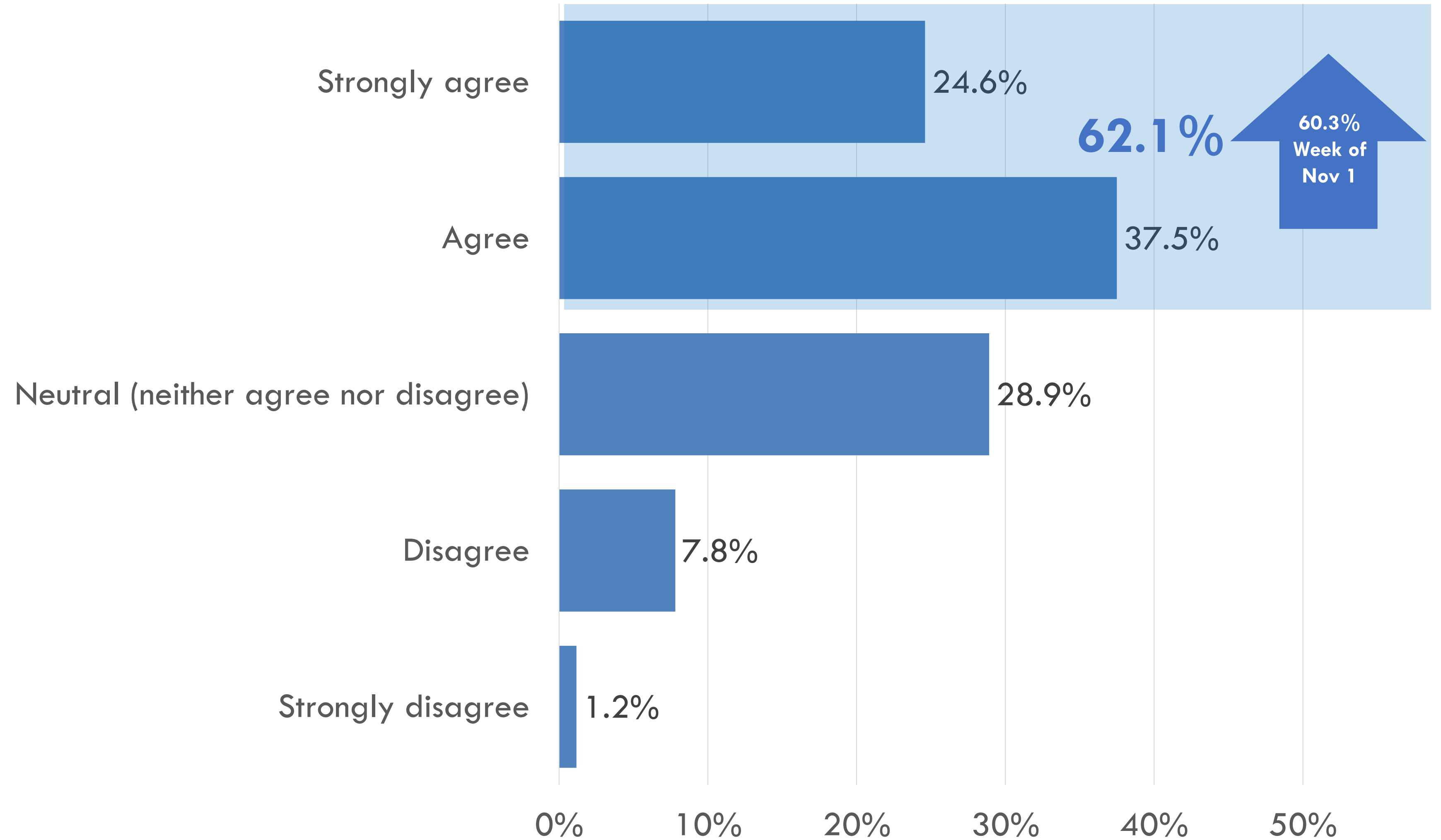
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

TRAVEL PRICES BEING TOO HIGH RIGHT NOW

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

Travel prices are generally too high right now.

(Base: Wave 78 data. All respondents, 1,208 completed surveys. Data collected November 10-12, 2021)

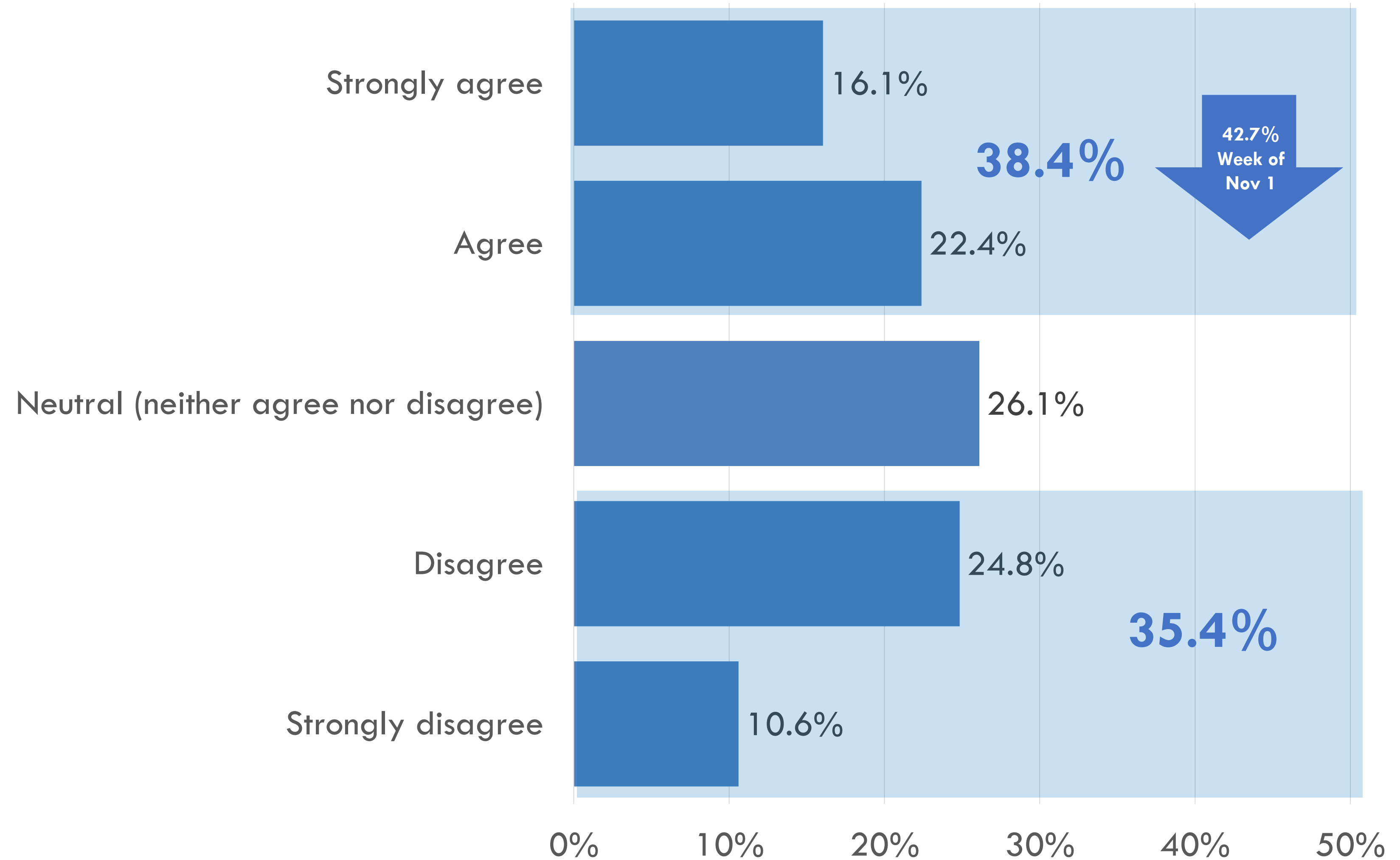


PRICES AS AN IMPEDIMENT TO TRAVEL

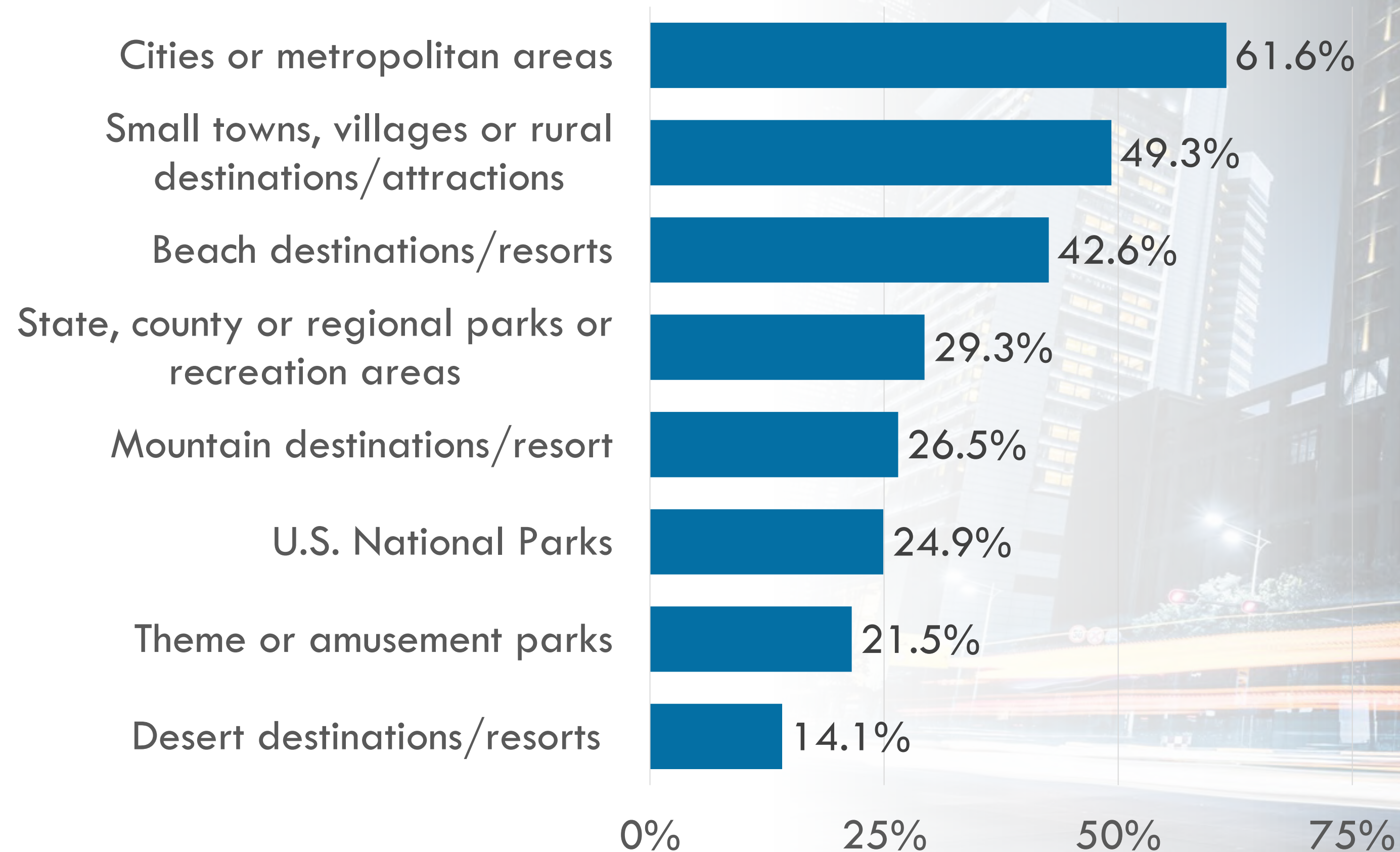
Question: How much do you agree or disagree with the following statements?

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

(Base: Wave 78 data. All respondents, 1,208 completed surveys. Data collected November 10-12, 2021)

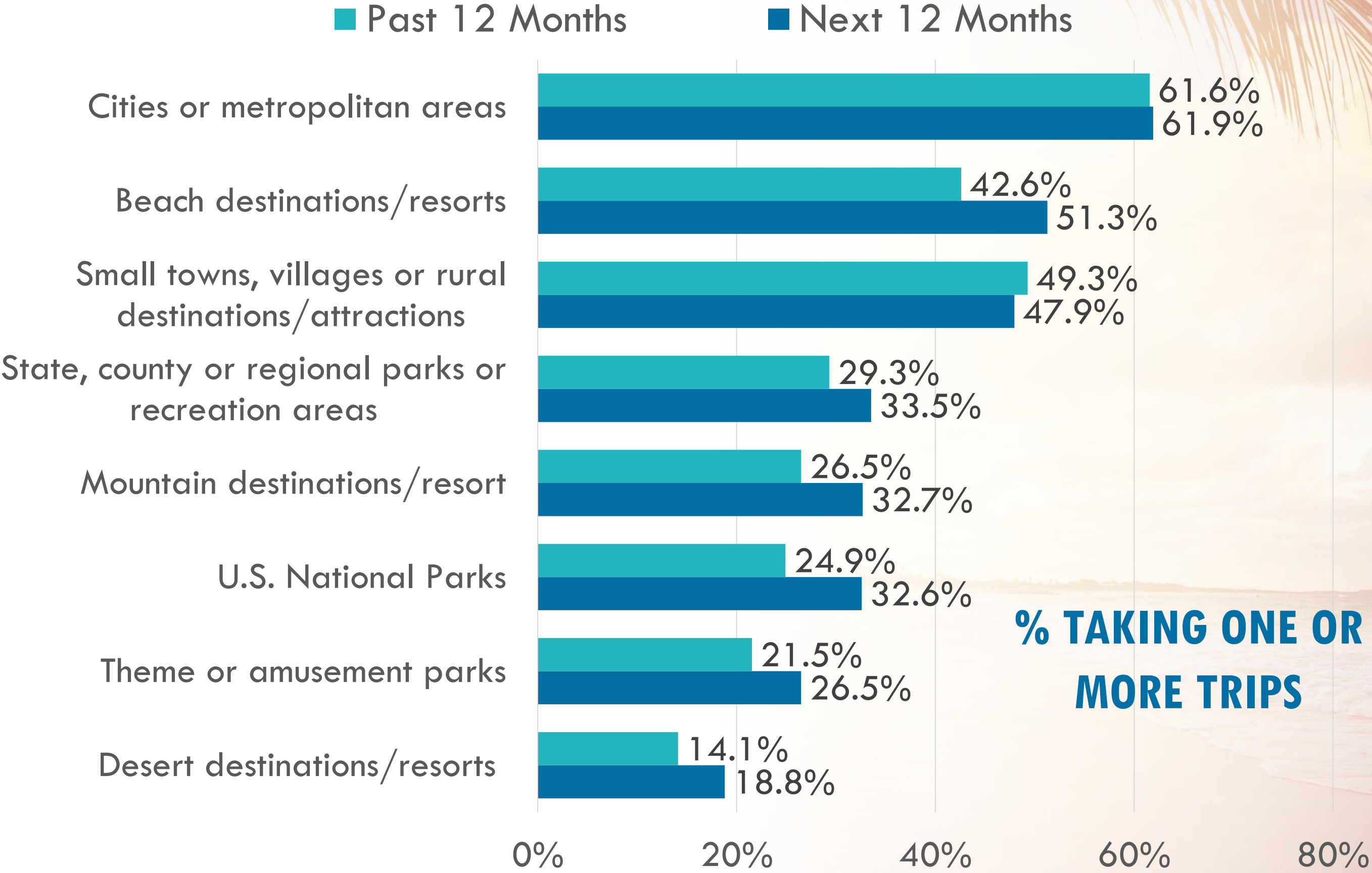


DESTINATION TYPES IN THE PAST 12 MONTHS



Question: In the PAST TWELVE (12) MONTHS, HOW MANY OF YOUR LEISURE TRIPS included the following types of leisure destinations?

DESTINATION TYPES IN THE PAST & NEXT 12 MONTHS



Question 1: In the PAST TWELVE (12) MONTHS, HOW MANY OF YOUR LEISURE TRIPS included the following types of leisure destinations? **Question 2:** In the next twelve (12) months, HOW MANY OF YOUR LEISURE TRIPS will likely include the following types of leisure destinations?



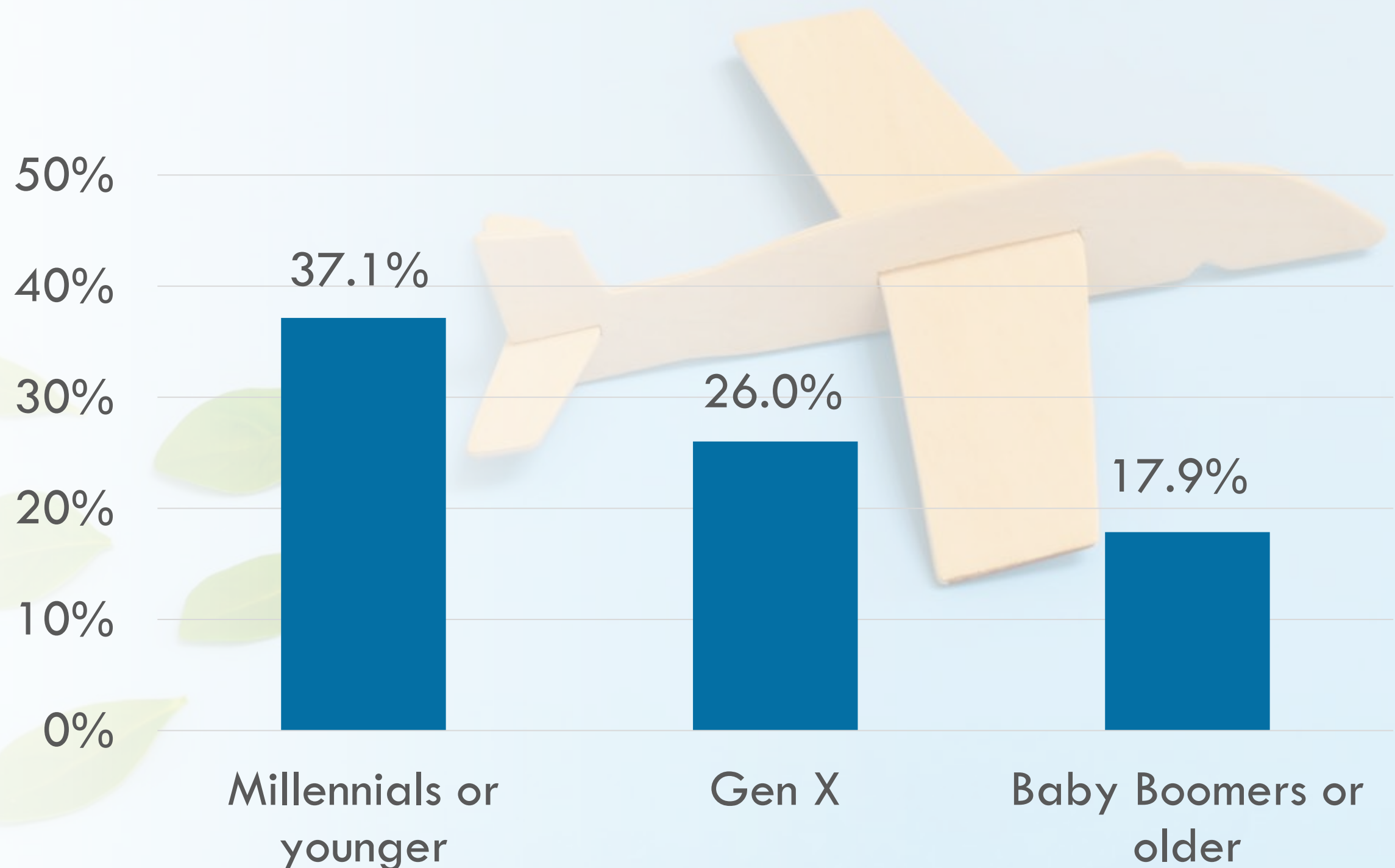
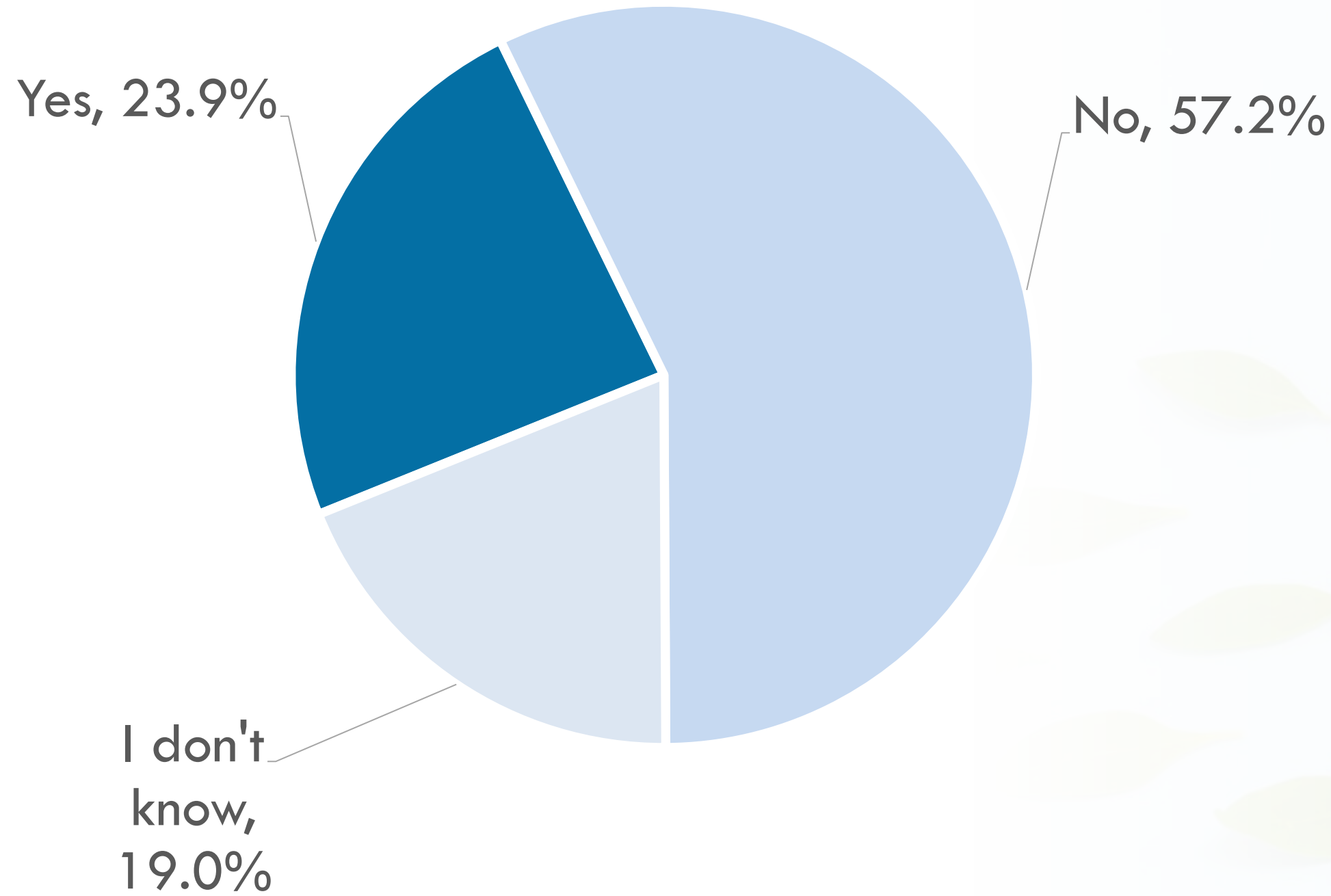
- **ENVIRONMENTAL CONCERNS**

- **CLIMATE CHANGE**

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

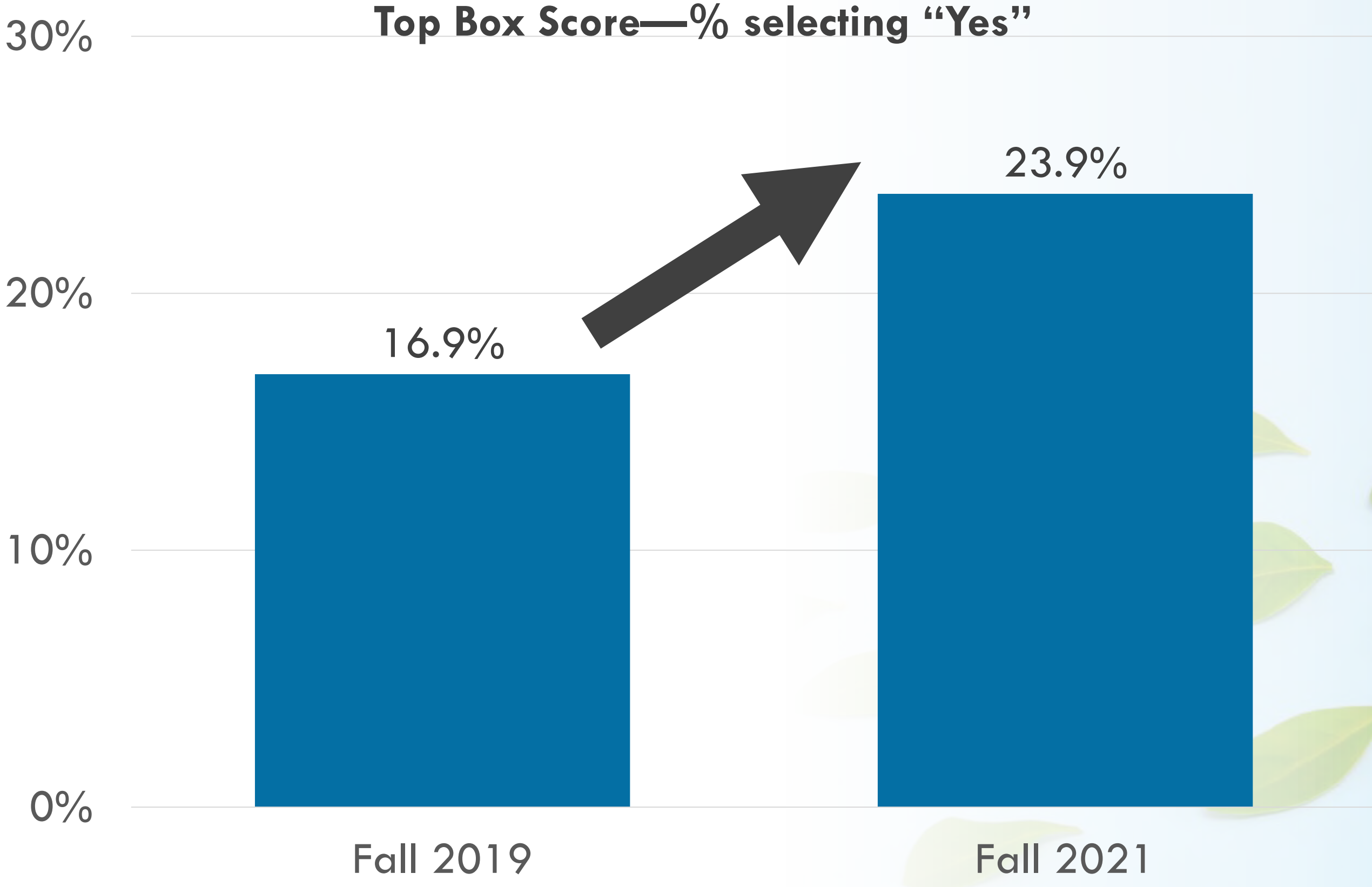
LEISURE TRAVEL HAVING A NEGATIVE IMPACT ON THE ENVIRONMENT

BY GENERATION



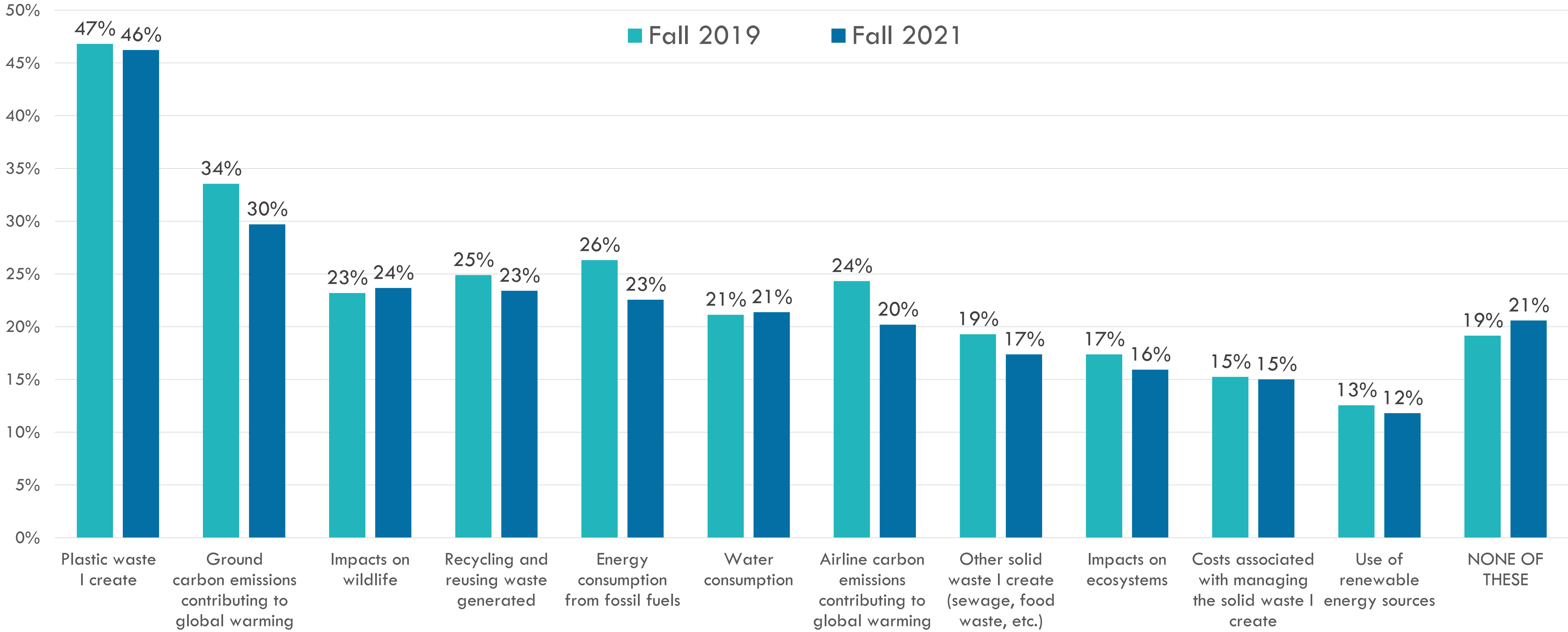
Question: Do you believe that people traveling for leisure have an overall negative impact on the environment?

LEISURE TRAVEL HAVING A NEGATIVE IMPACT ON THE ENVIRONMENT

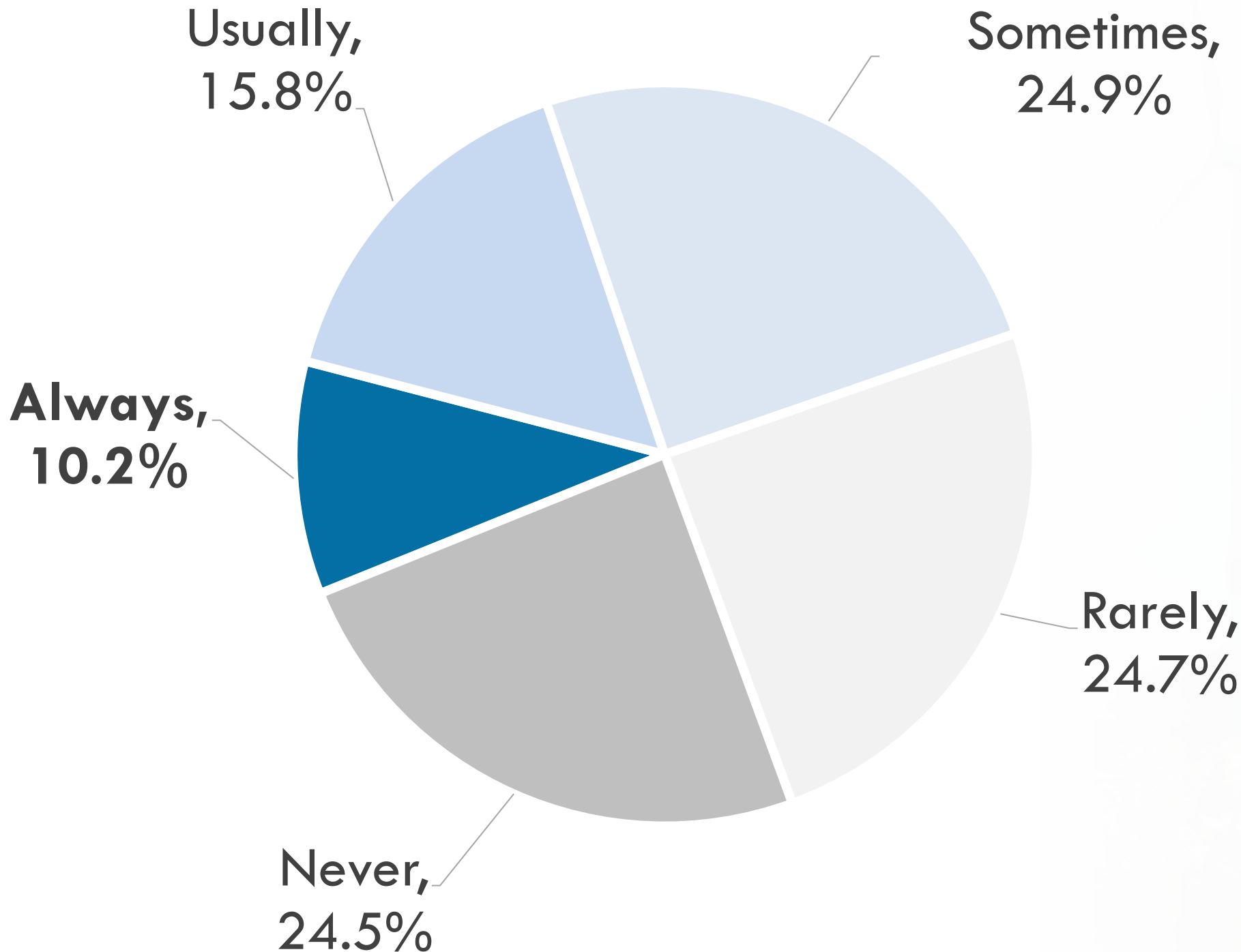


Question: Do you believe that people traveling for leisure have an overall negative impact on the environment?

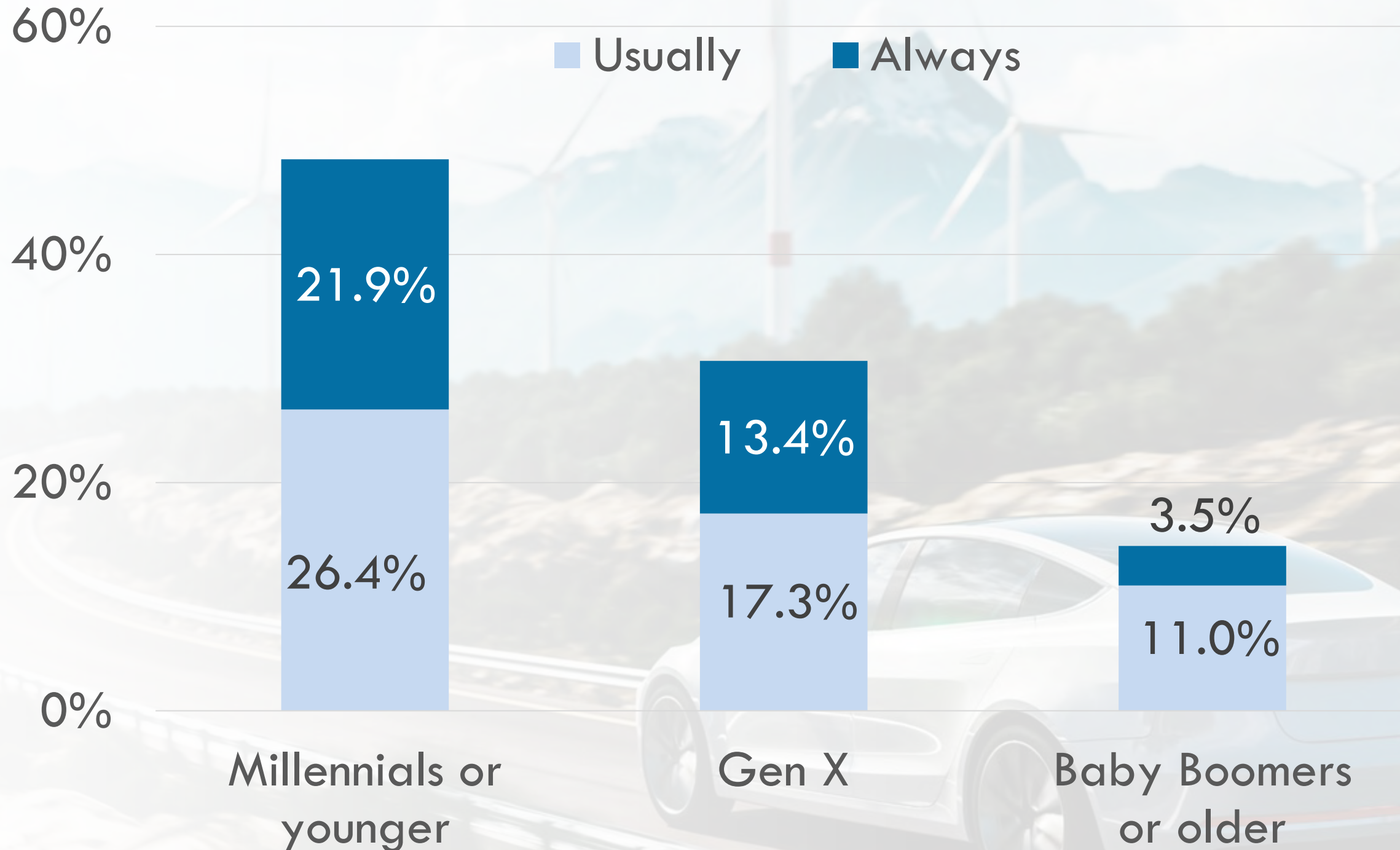
ENVIRONMENTAL ISSUES EXPERIENCED WHILE TRAVELING IN THE U.S. IN THE PAST 12 MONTHS



CONSIDERING THE ENVIRONMENT WHEN PLANNING TRAVEL

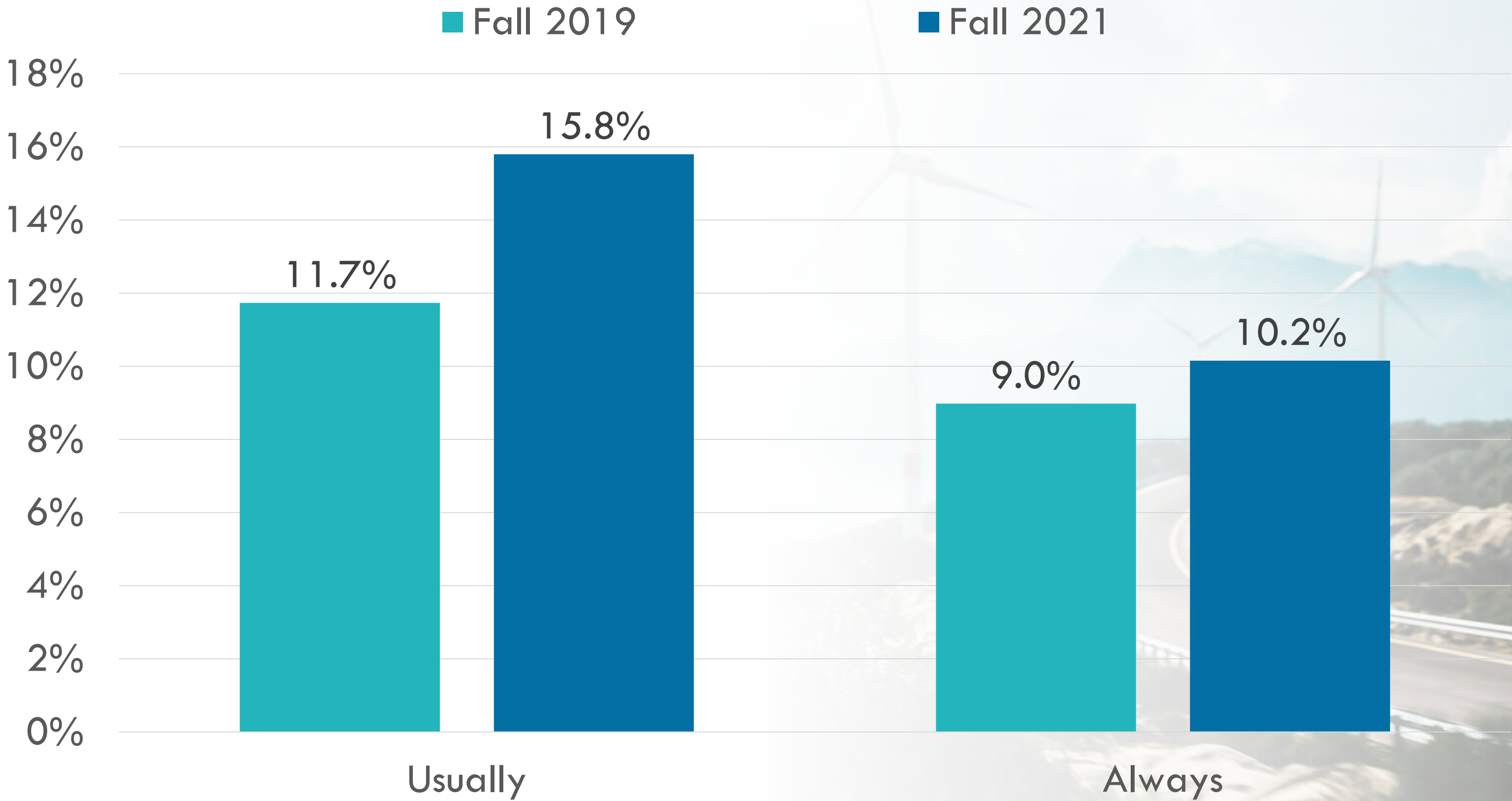


BY GENERATION



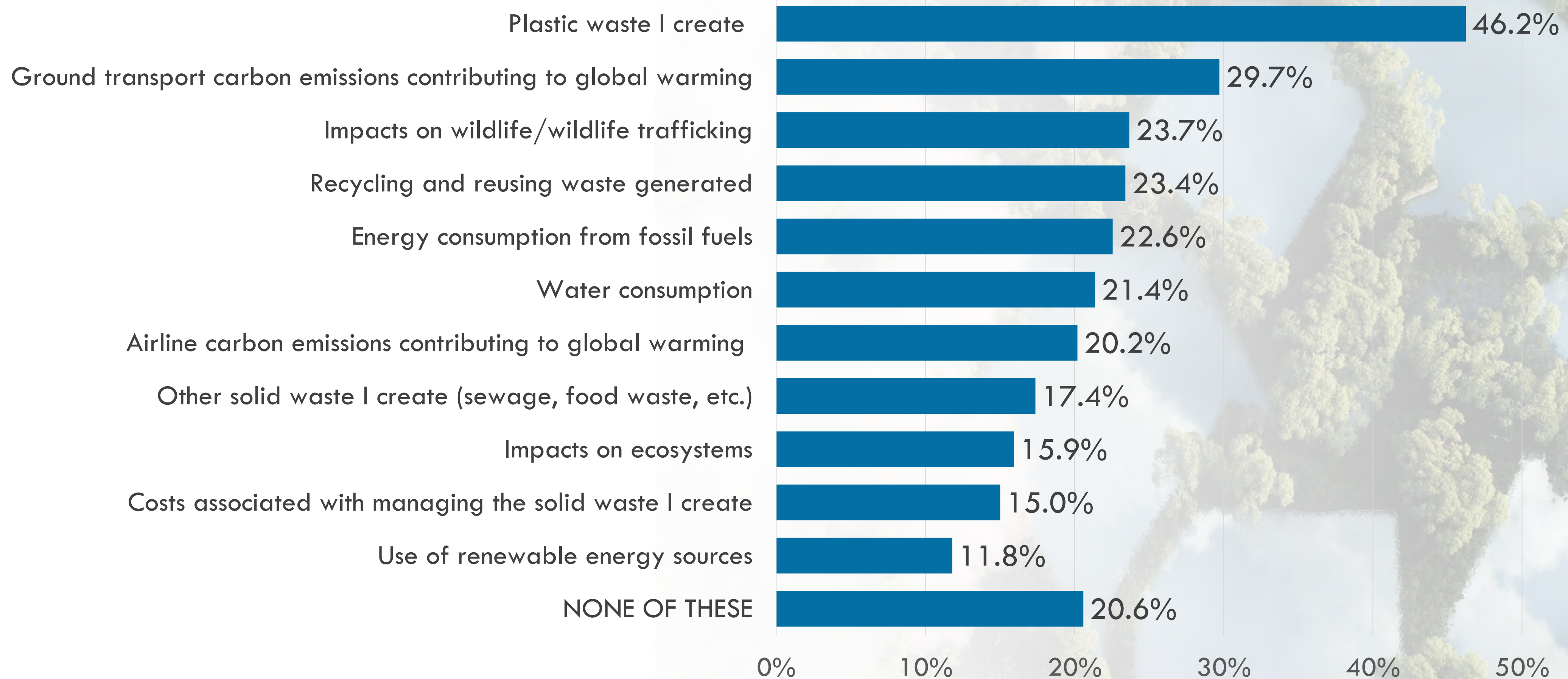
Question: When planning your trips, how often do you think about the impacts on the environment of your travels?

CONSIDERING THE ENVIRONMENT WHEN PLANNING TRAVEL




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

ASPECTS OF ENVIRONMENTAL IMPACT CONSIDERED

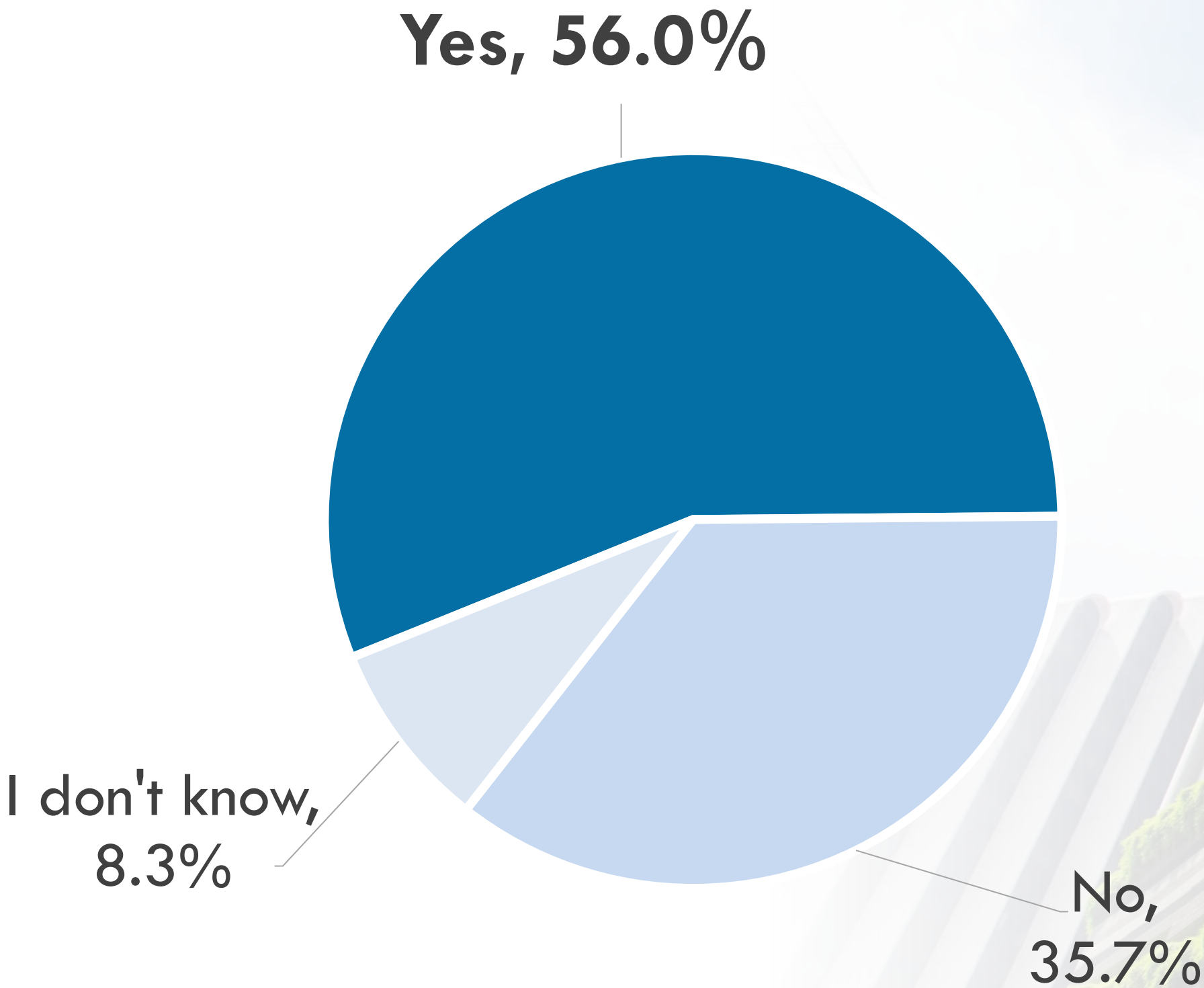


Question: When traveling, what aspects of your environmental impact do you typically think about?

A photograph of a modern building with a green facade and a glass tower in the background. The building has multiple levels with greenery growing on them. The sky is blue with some clouds.

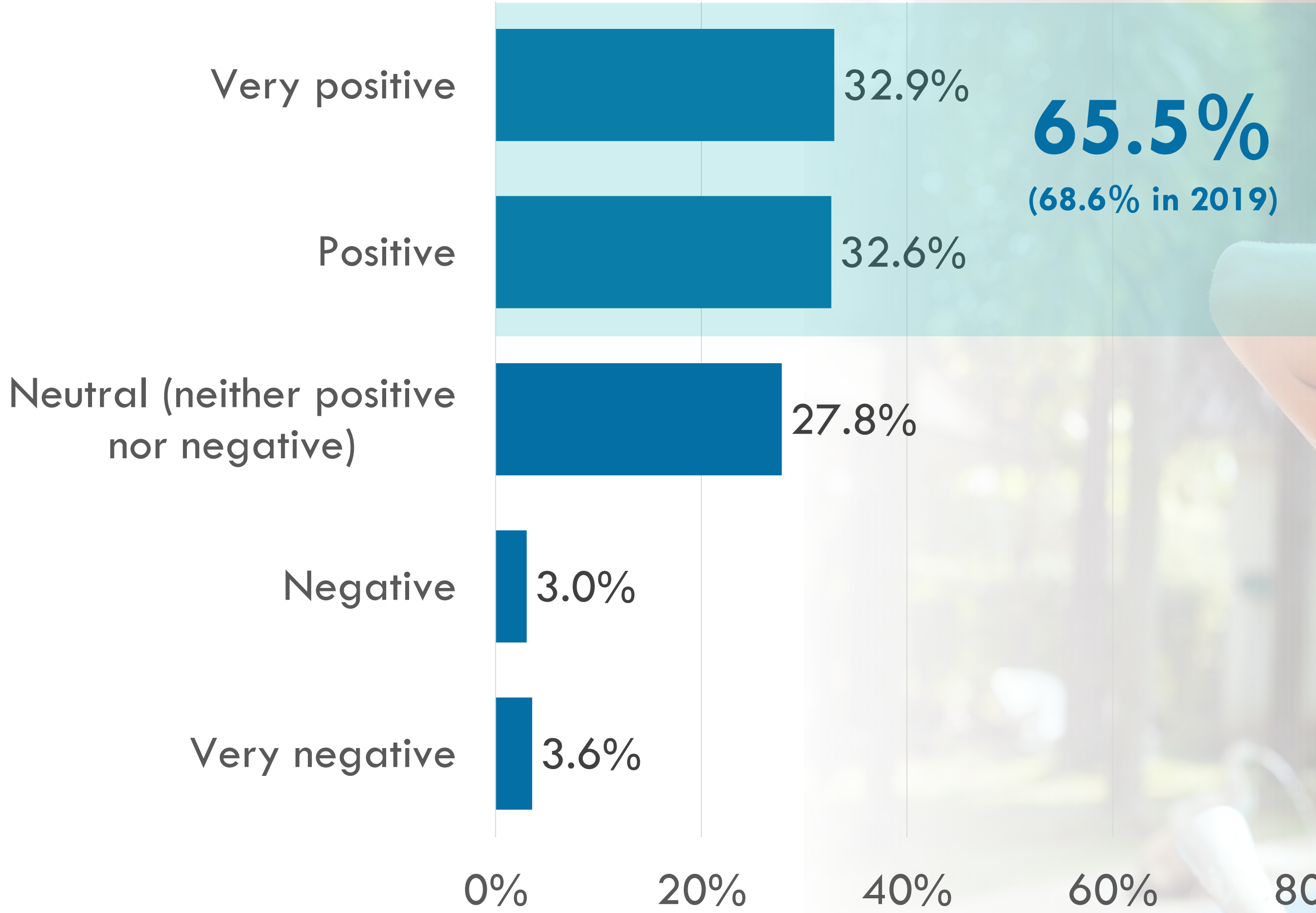
Question: Before taking this survey, were you aware that many hotels now have “green initiatives” that reduce the environmental impact of a guest’s stay? (e.g., in-room recycling, options to not change towels and sheets daily, recyclable room keys, alternatives to water bottles, etc.)

HOTEL GREEN PROGRAMS: AWARENESS



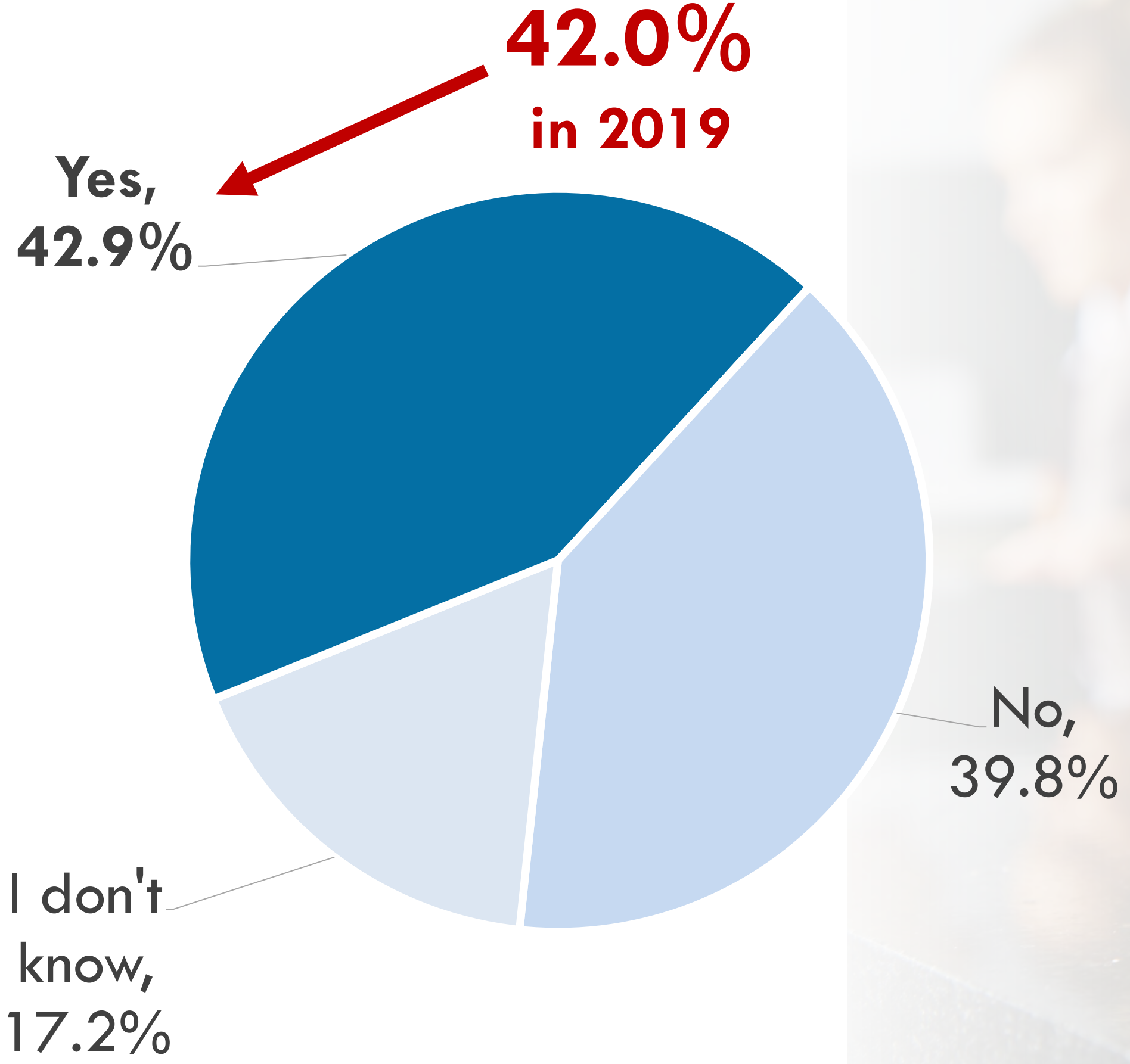
Question: Before taking this survey, were you aware that many hotels now have “green initiatives” that reduce the environmental impact of a guest’s stay?

FEELINGS ABOUT HOTEL GREEN PROGRAMS



Question: In general, how do you feel about hotel green initiatives? (Select one)

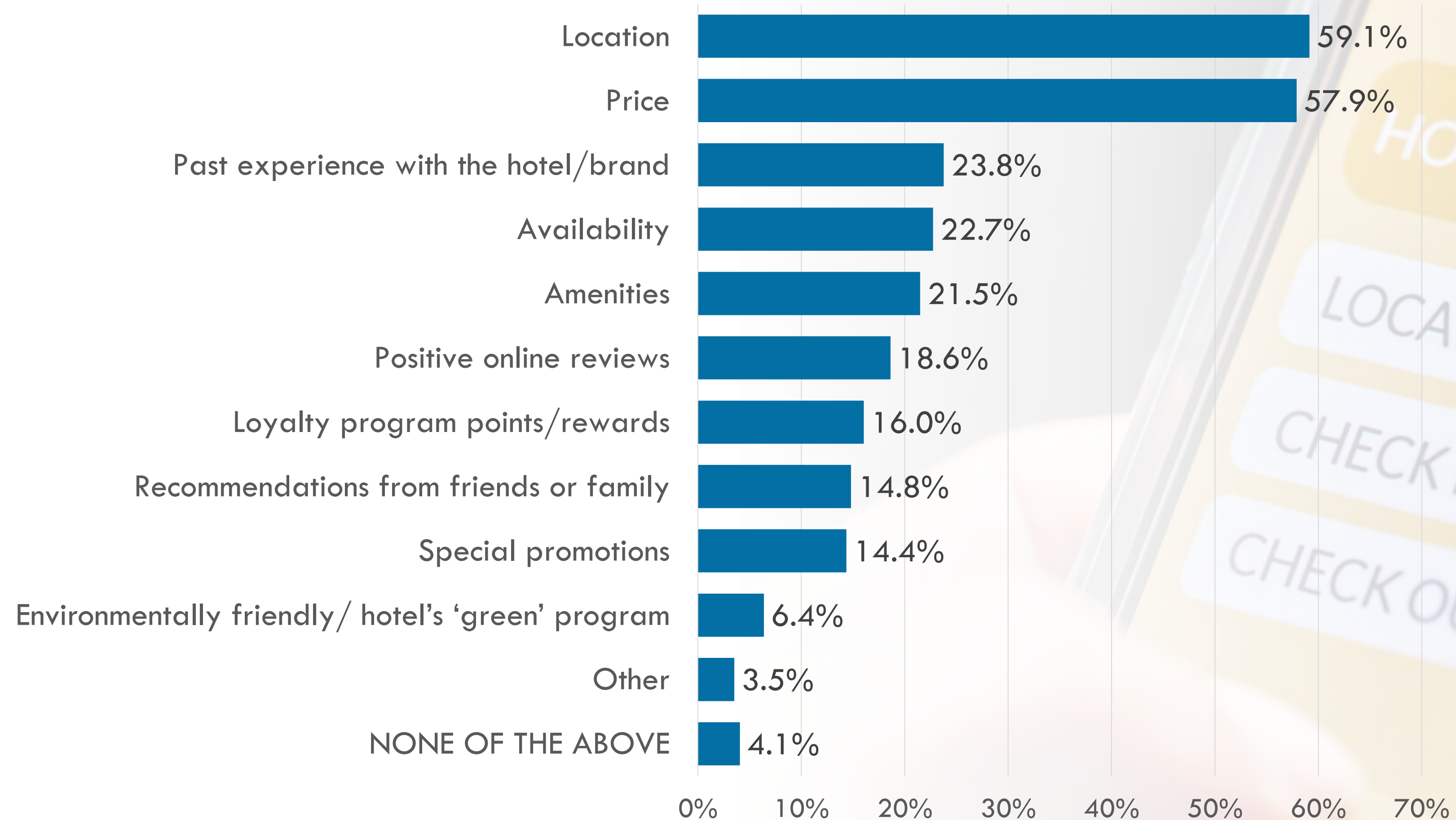
HOTEL GREEN PROGRAMS: PARTICIPATION



Question: When traveling, do you regularly participate in hotel green initiatives?



HOTEL SELECTION CRITERIA



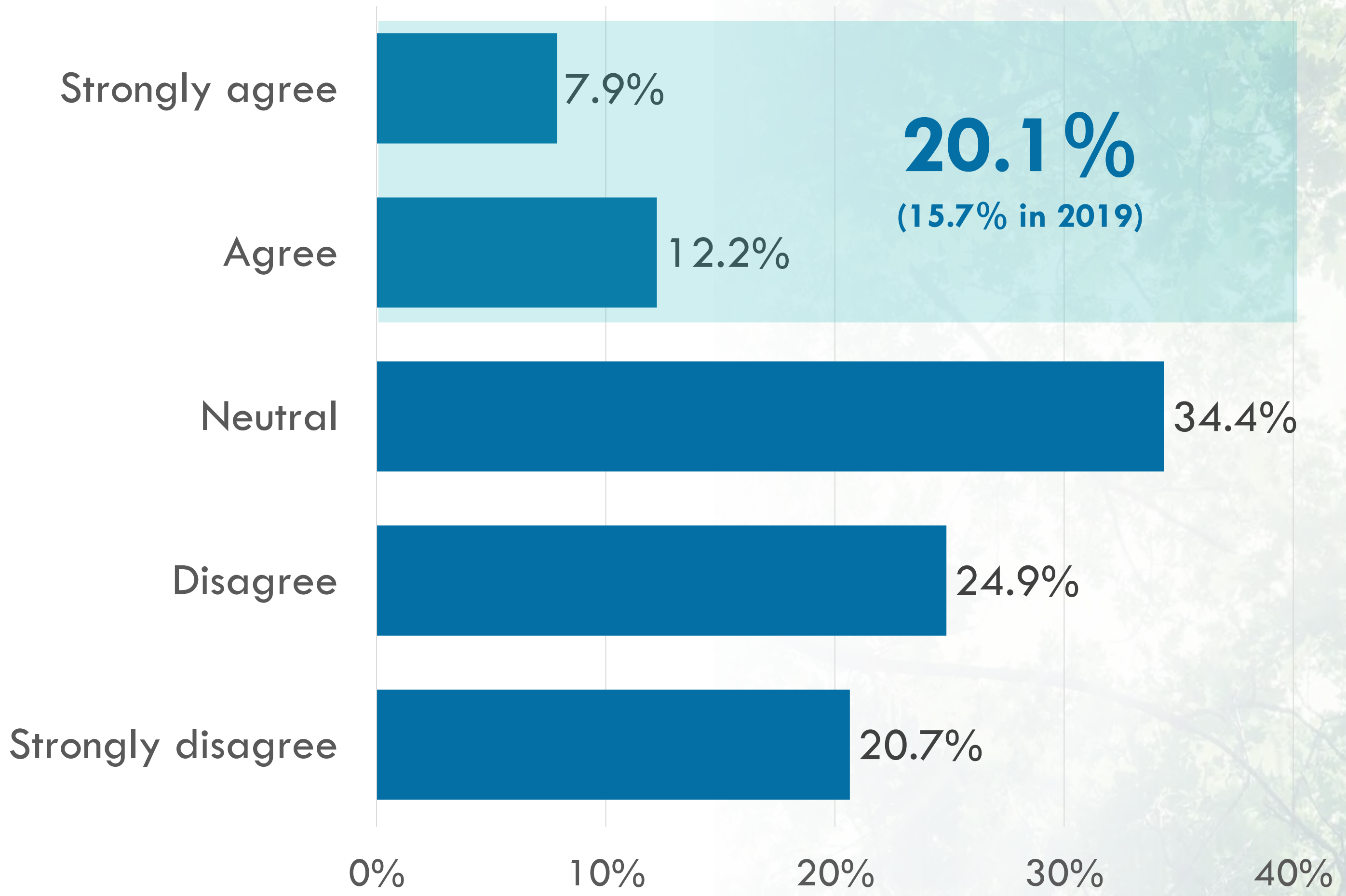
Question: What are the top three motivators when you select your accommodations for leisure travel within the U.S.? (Select as many as three)

The State of the American Traveler, Destination Management Edition, Destination Analysts, Inc. Fall 2021

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)

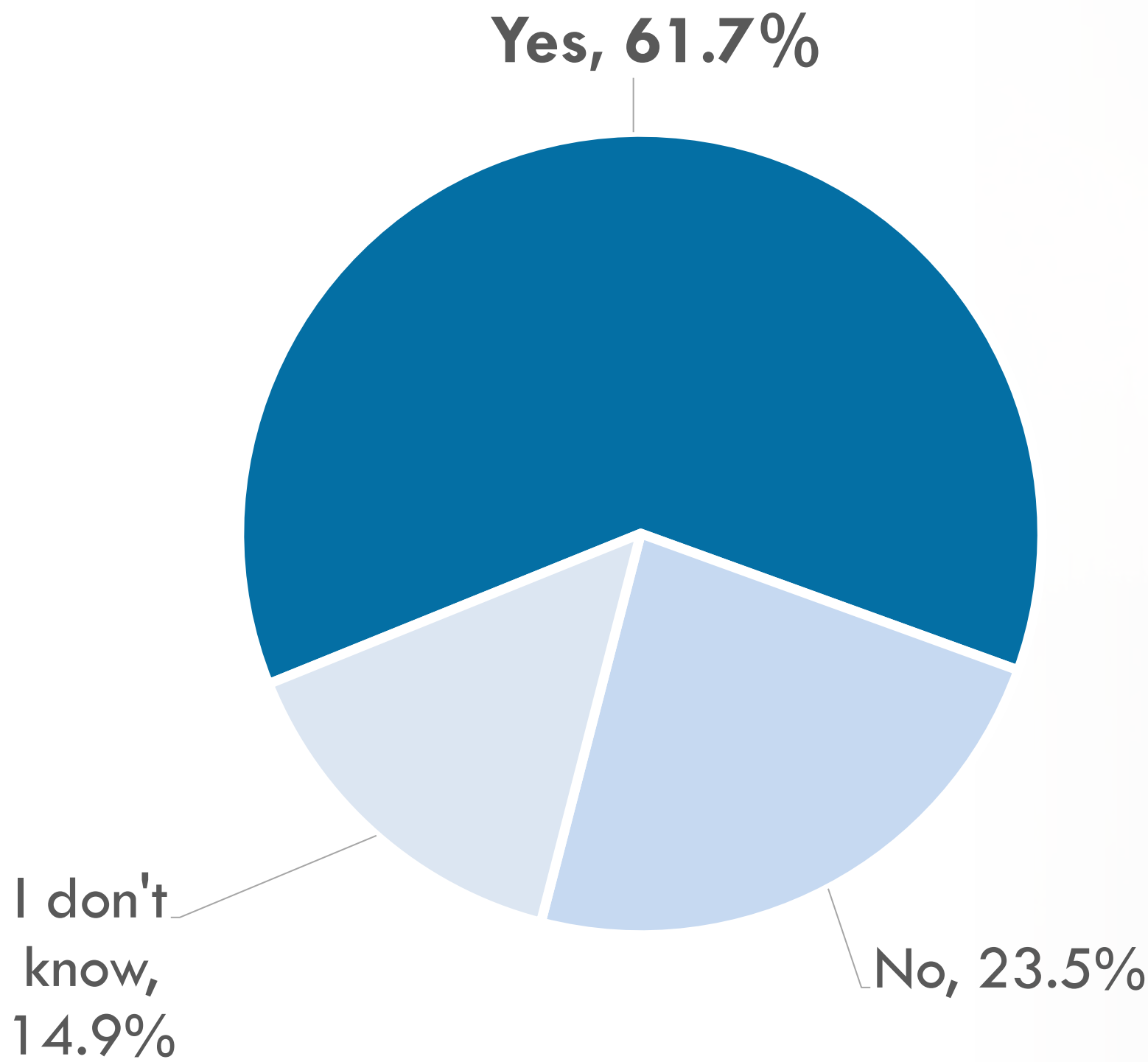
CLIMATE CHANGE



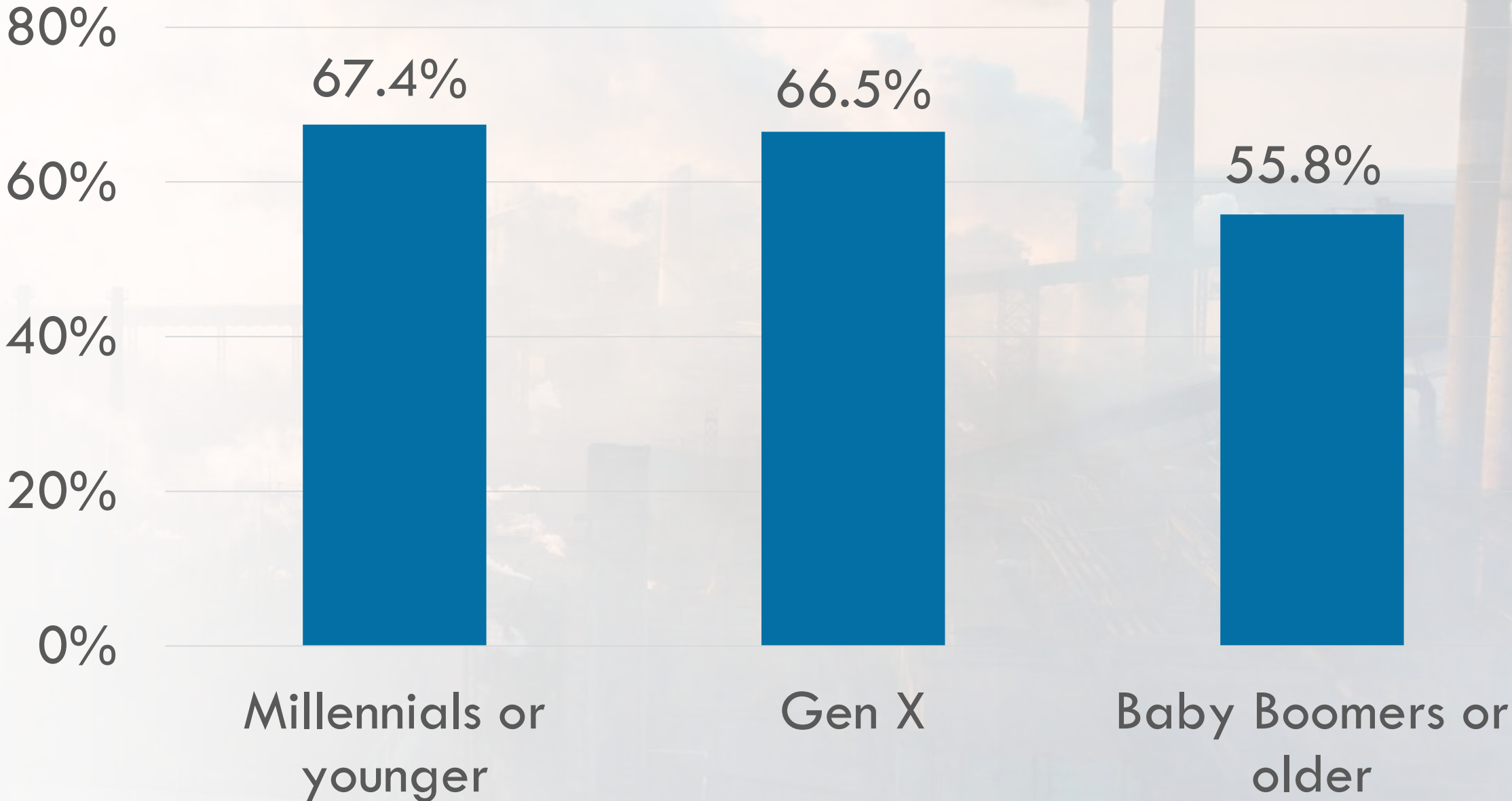


Question: Do you believe that human activity is responsible for climate change?

LEISURE TRAVEL HAVING A NEGATIVE IMPACT ON THE ENVIRONMENT

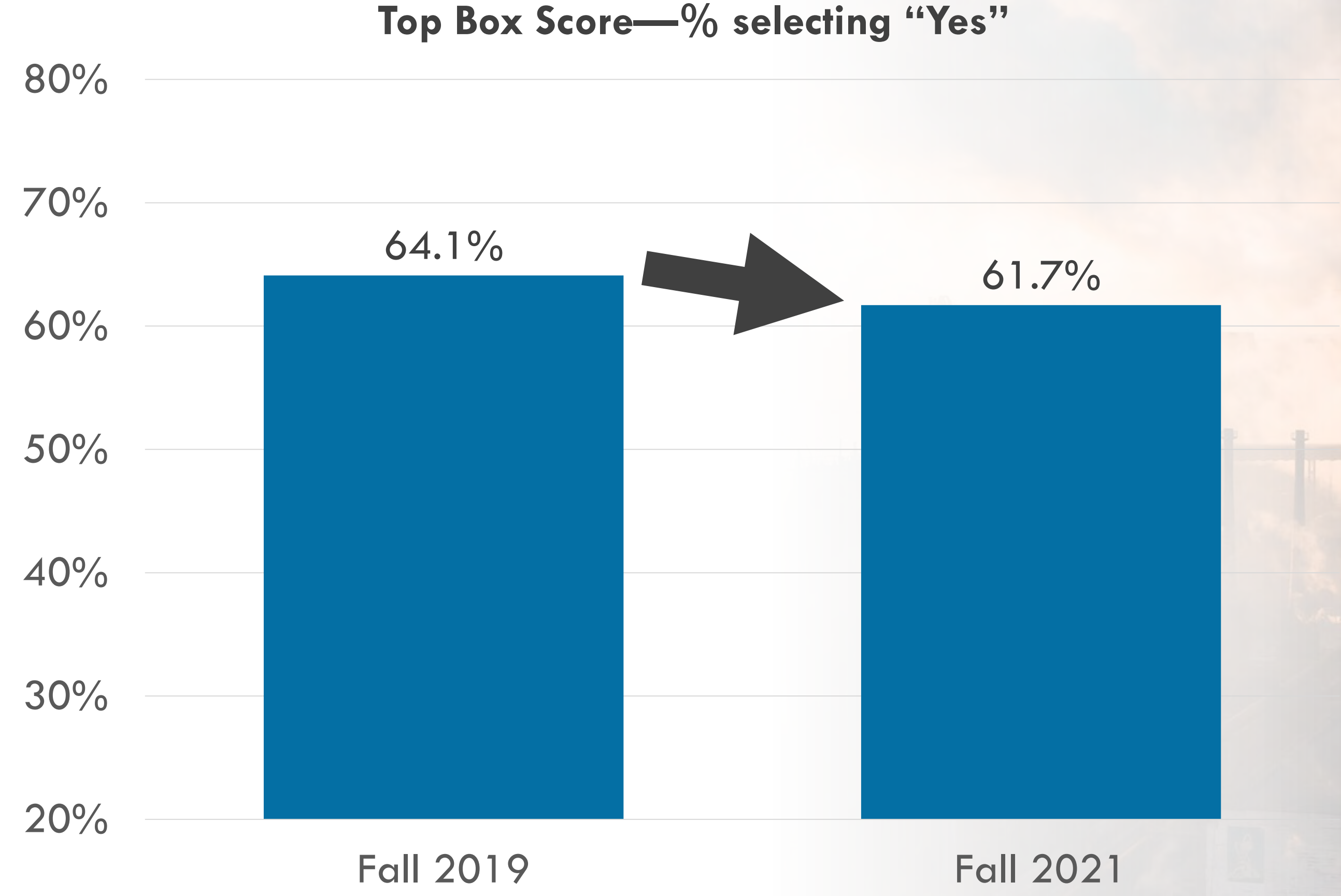


BY GENERATION



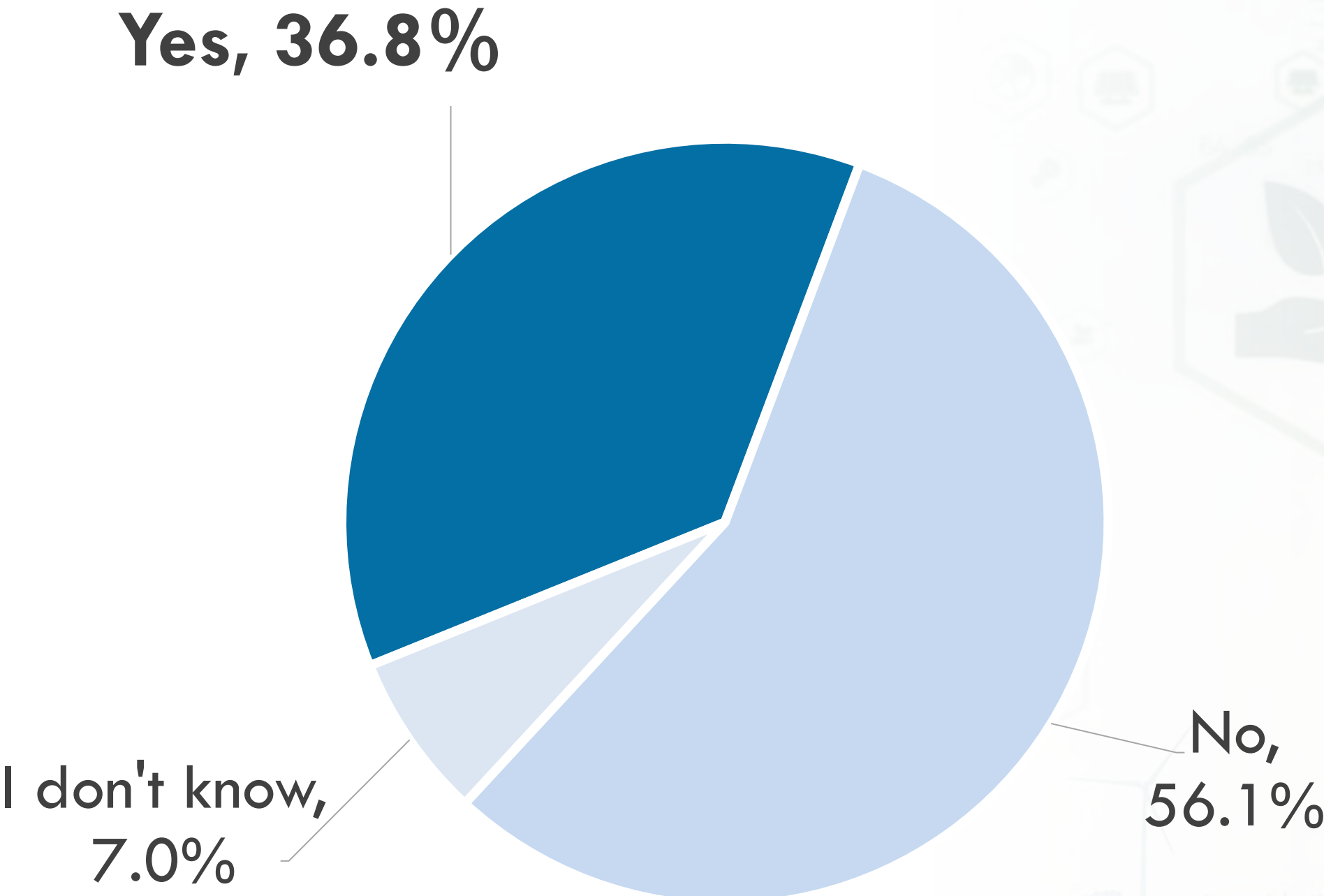
Question: Do you believe that human activity is responsible for climate change?

LEISURE TRAVEL HAVING A NEGATIVE IMPACT ON THE ENVIRONMENT



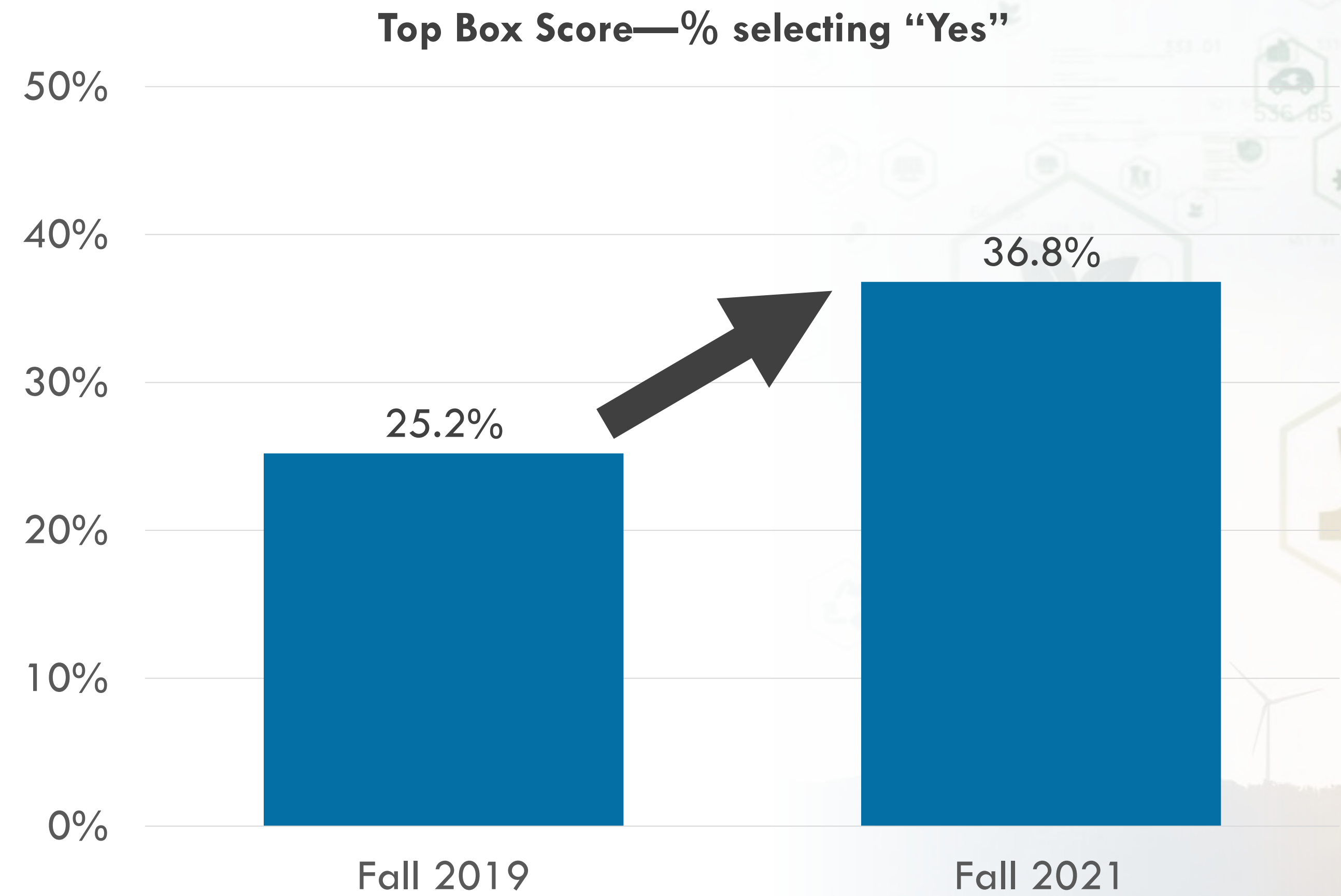
Question: Do you believe that human activity is responsible for climate change?

CARBON OFFSETS FOR TRAVEL: AWARENESS



Question: Before taking this survey, had you ever heard of “carbon offsets” for travel?

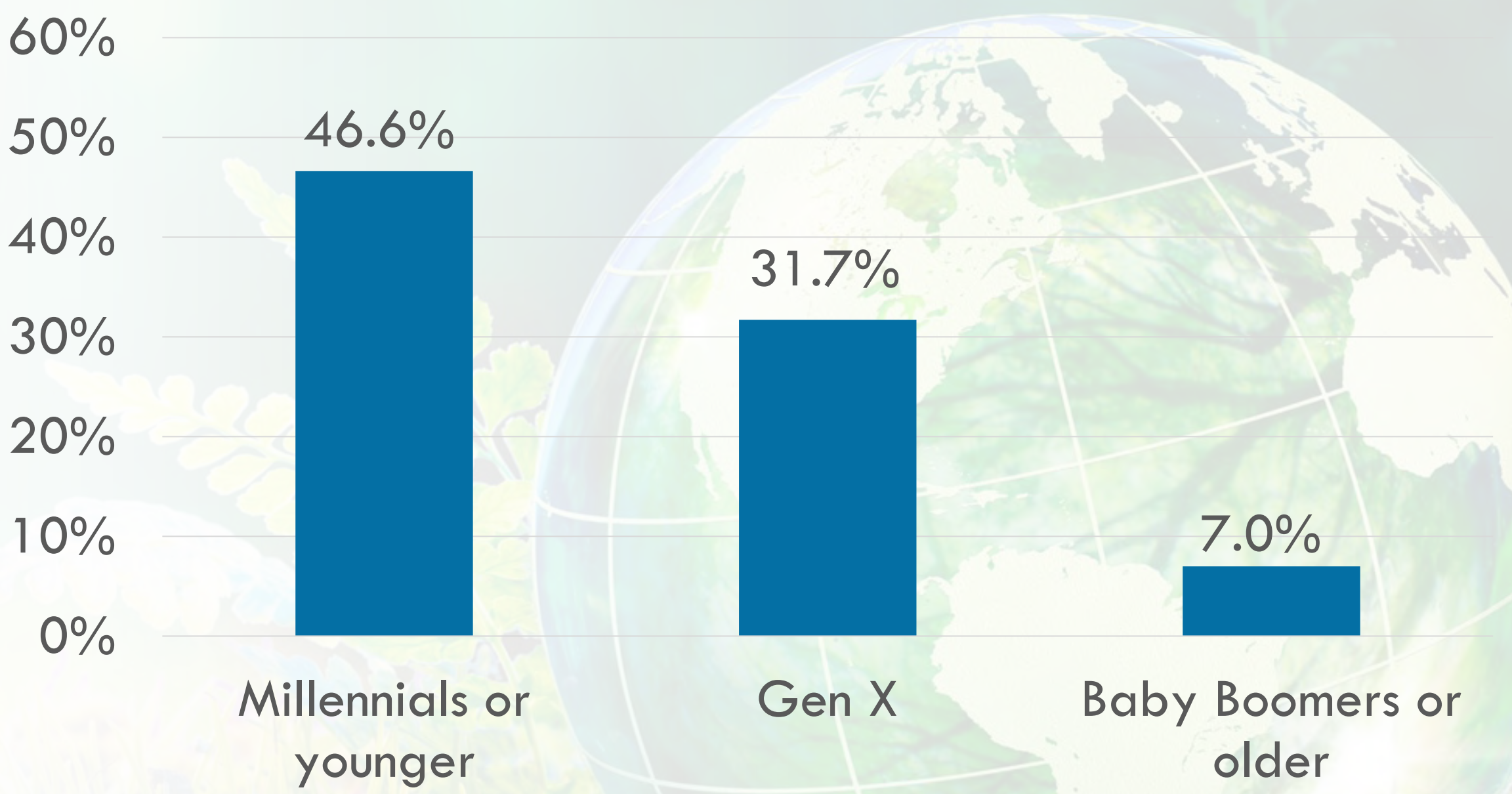
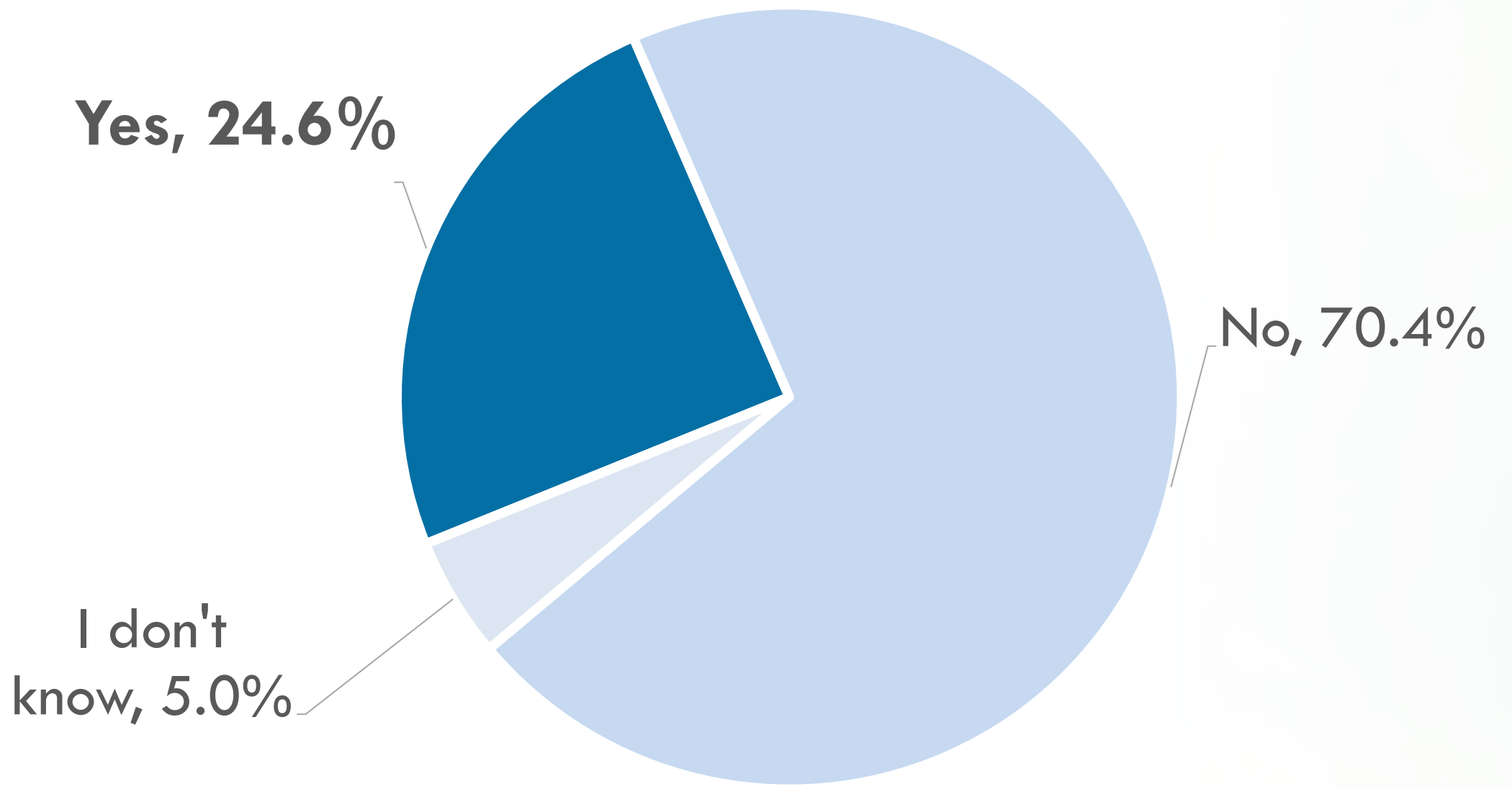
CARBON OFFSETS FOR TRAVEL: AWARENESS



Question: Before taking this survey, had you ever heard of “carbon offsets” for travel?

HISTORY OF PURCHASING A “CARBON OFFSET” FOR TRAVEL

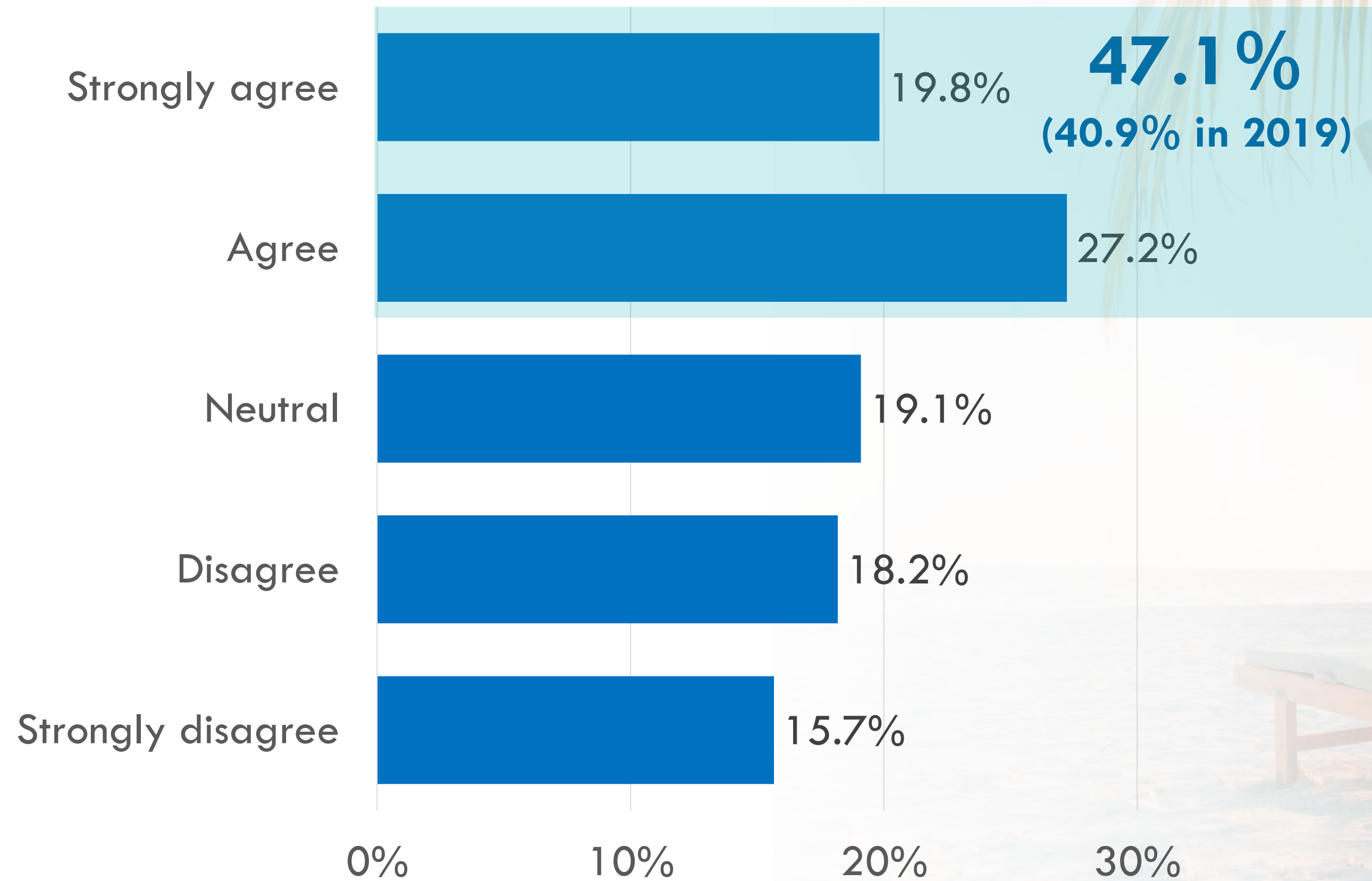
BY GENERATION



Question: Have you ever purchased a “carbon offset” for your travel?

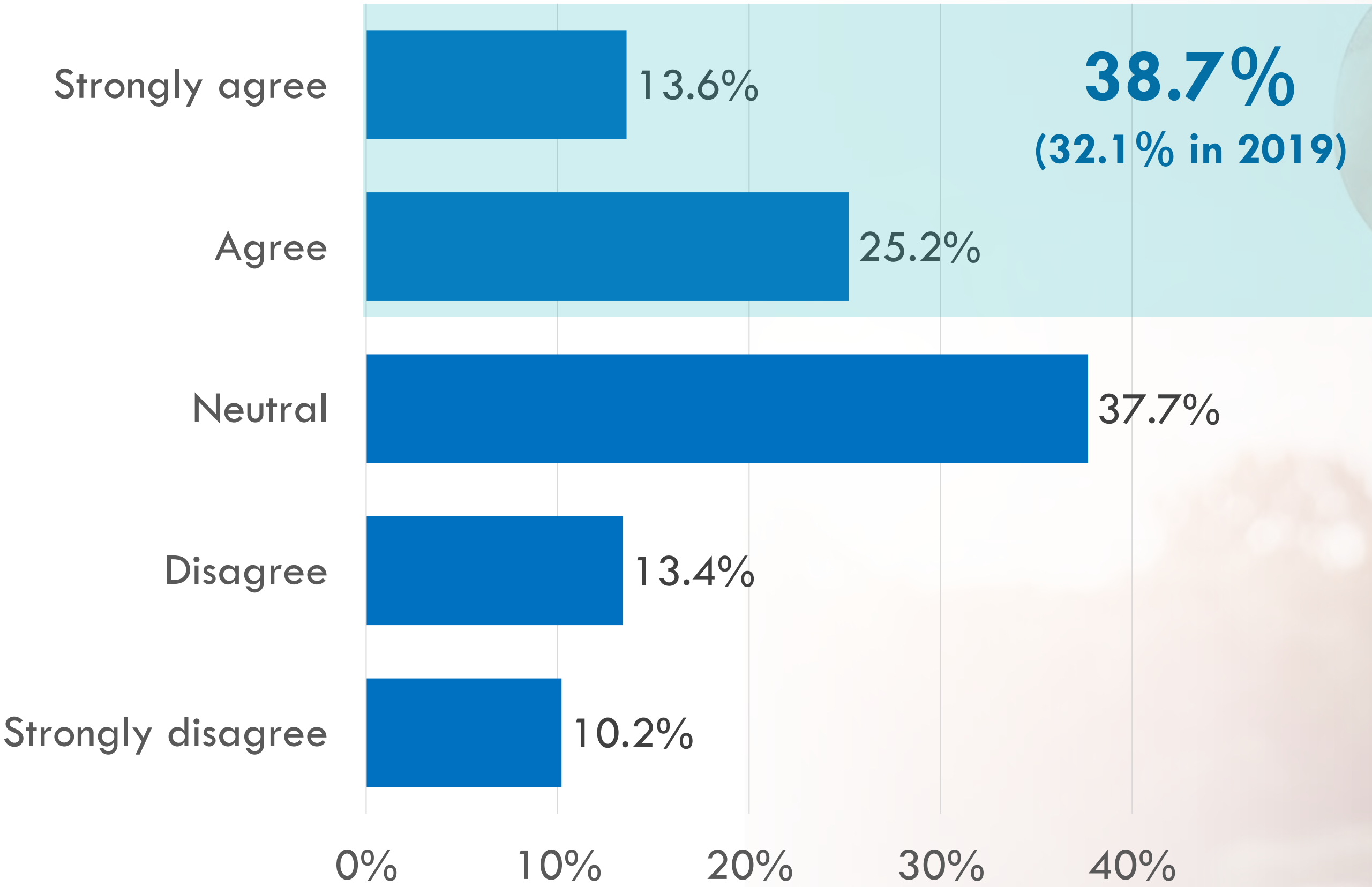
COMMUNITIES AND THE IMPACT OF OVER-TOURISM

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



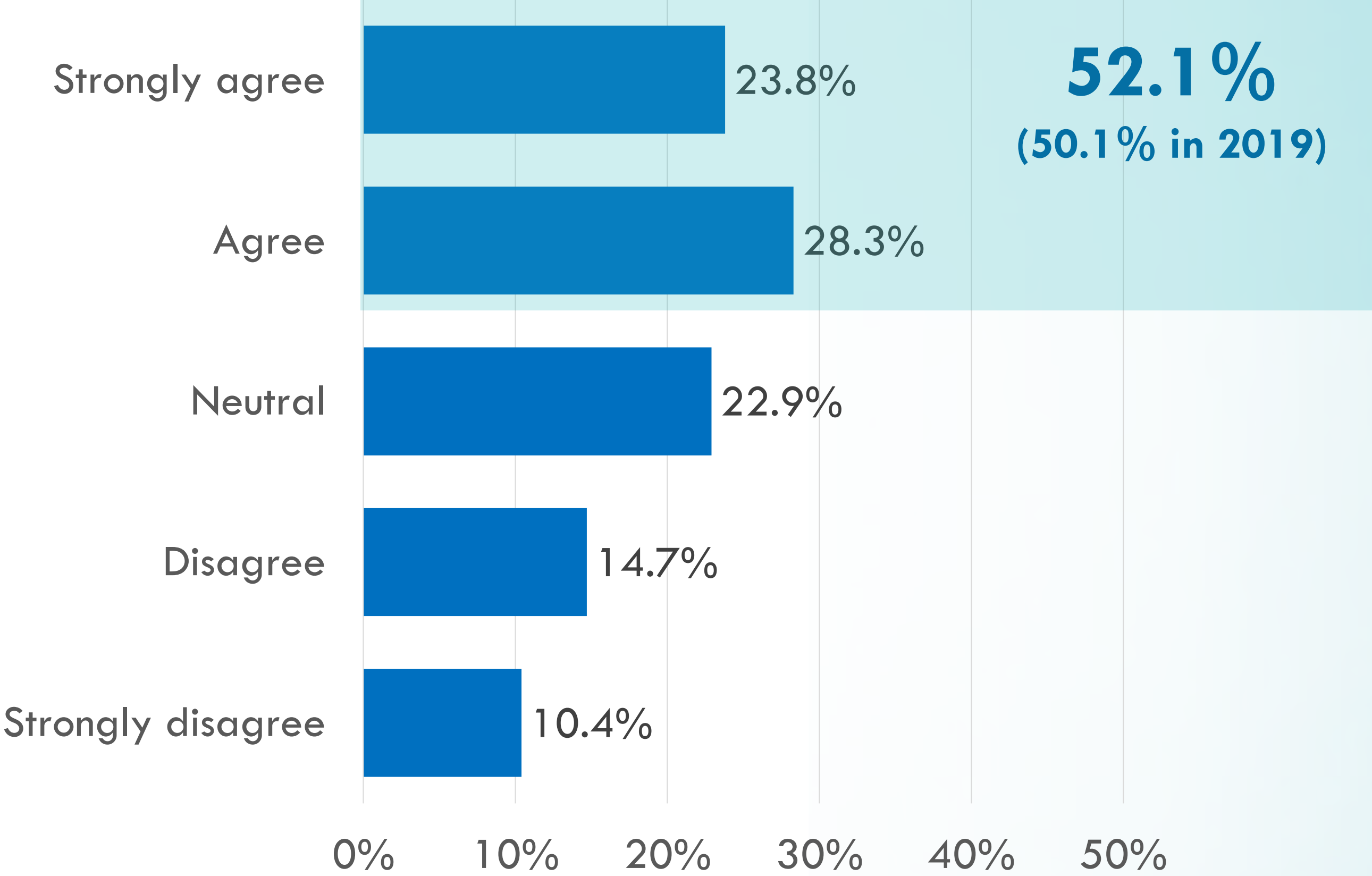
Statement: I live in a community that is a popular tourism destination.

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



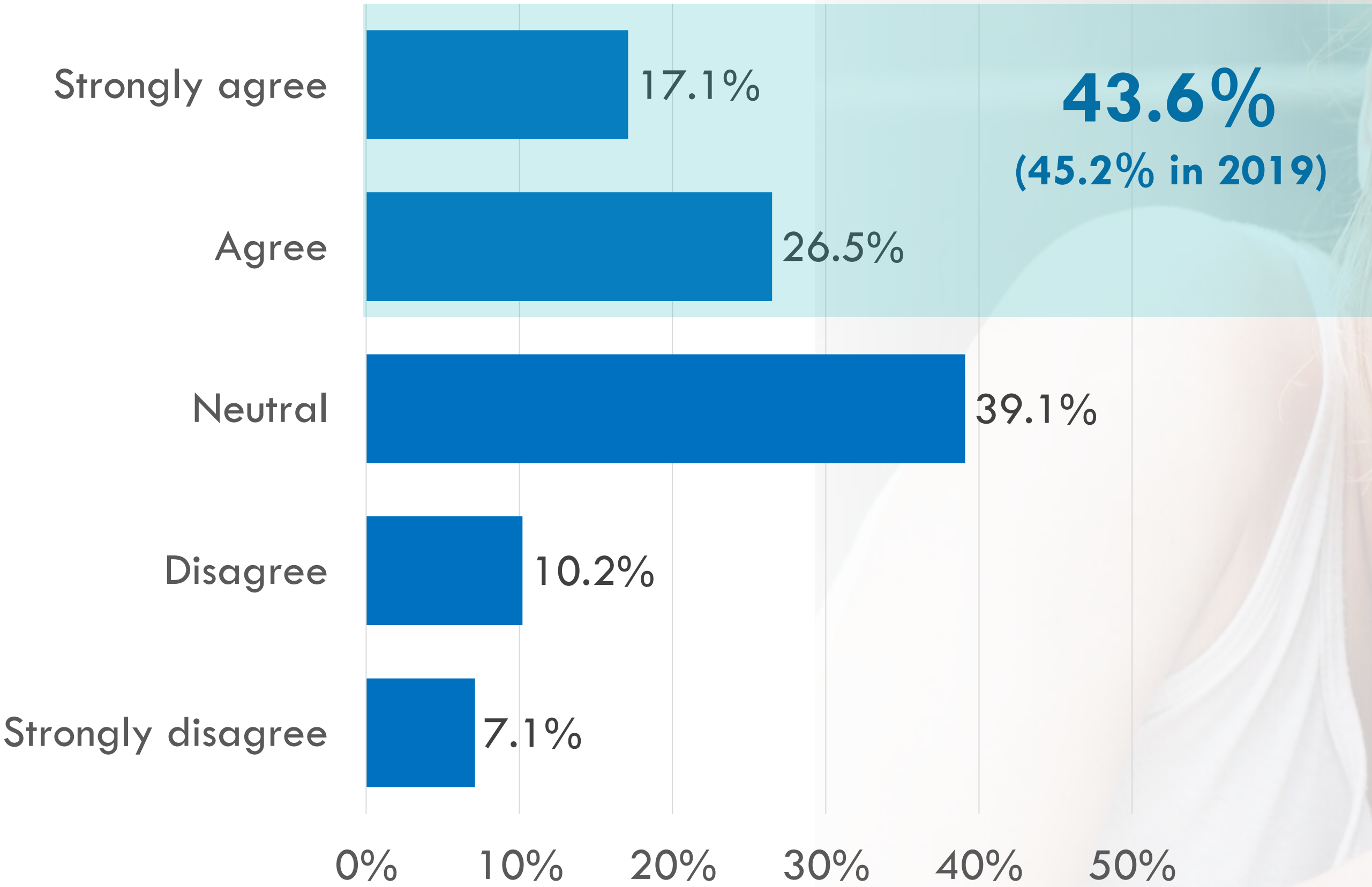
Statement: Tourism in my community makes it a better place in which to live.

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



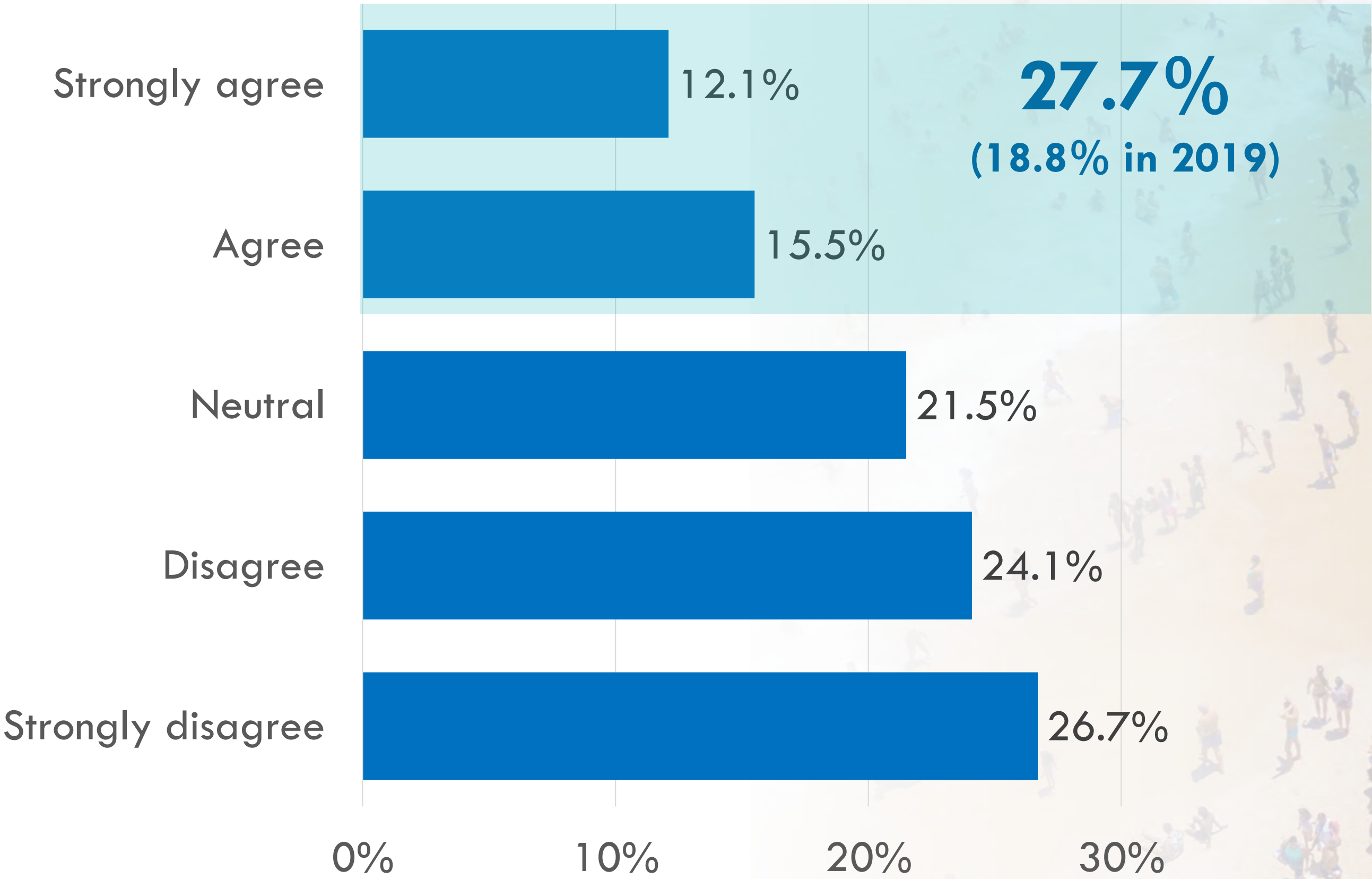
Statement: Tourism is important to the economy of the community in which I live.

“I ENJOY INTERACTING WITH VISITORS TO MY COMMUNITY”



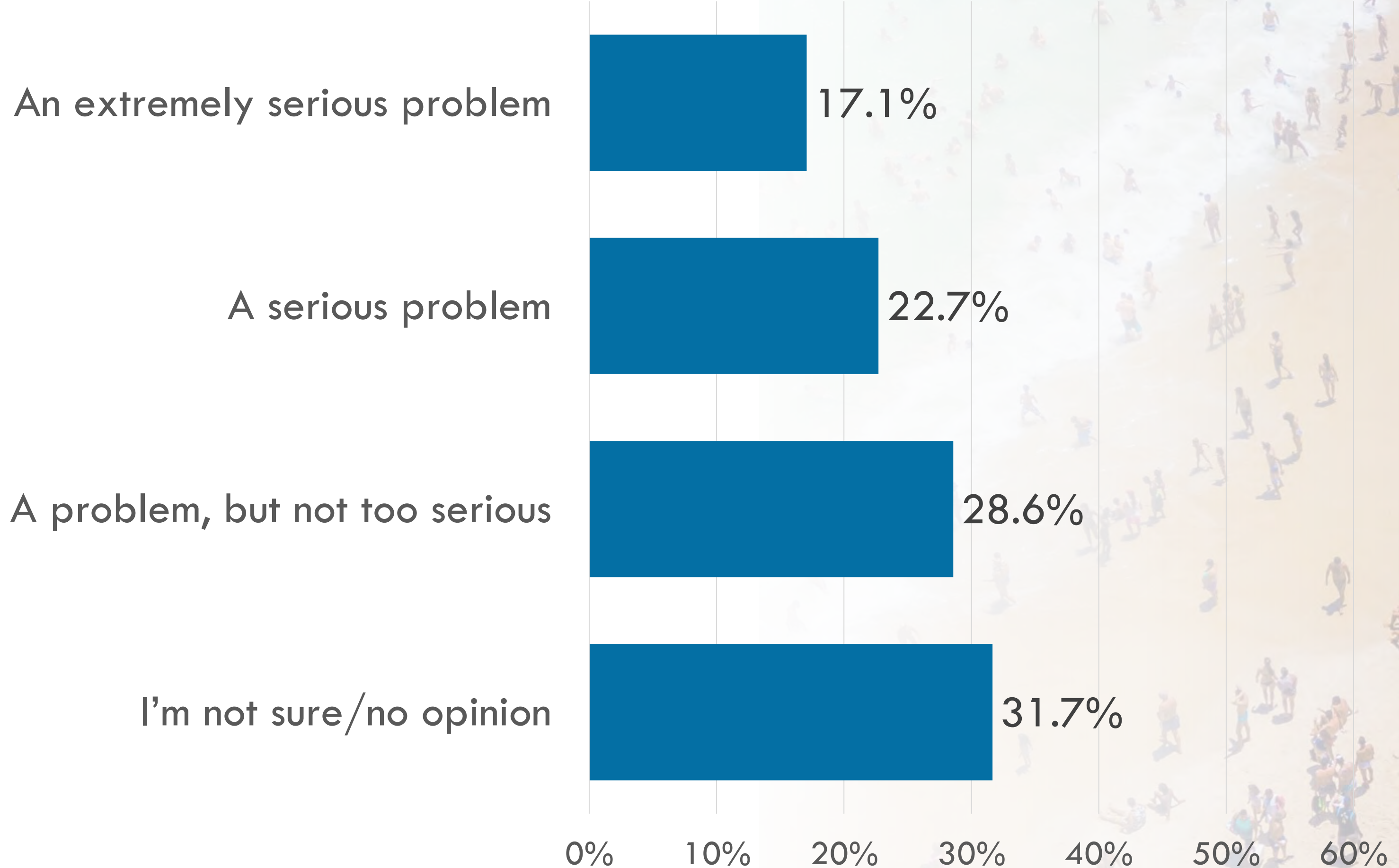
Statement: I enjoy interacting with visitors to my community.

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



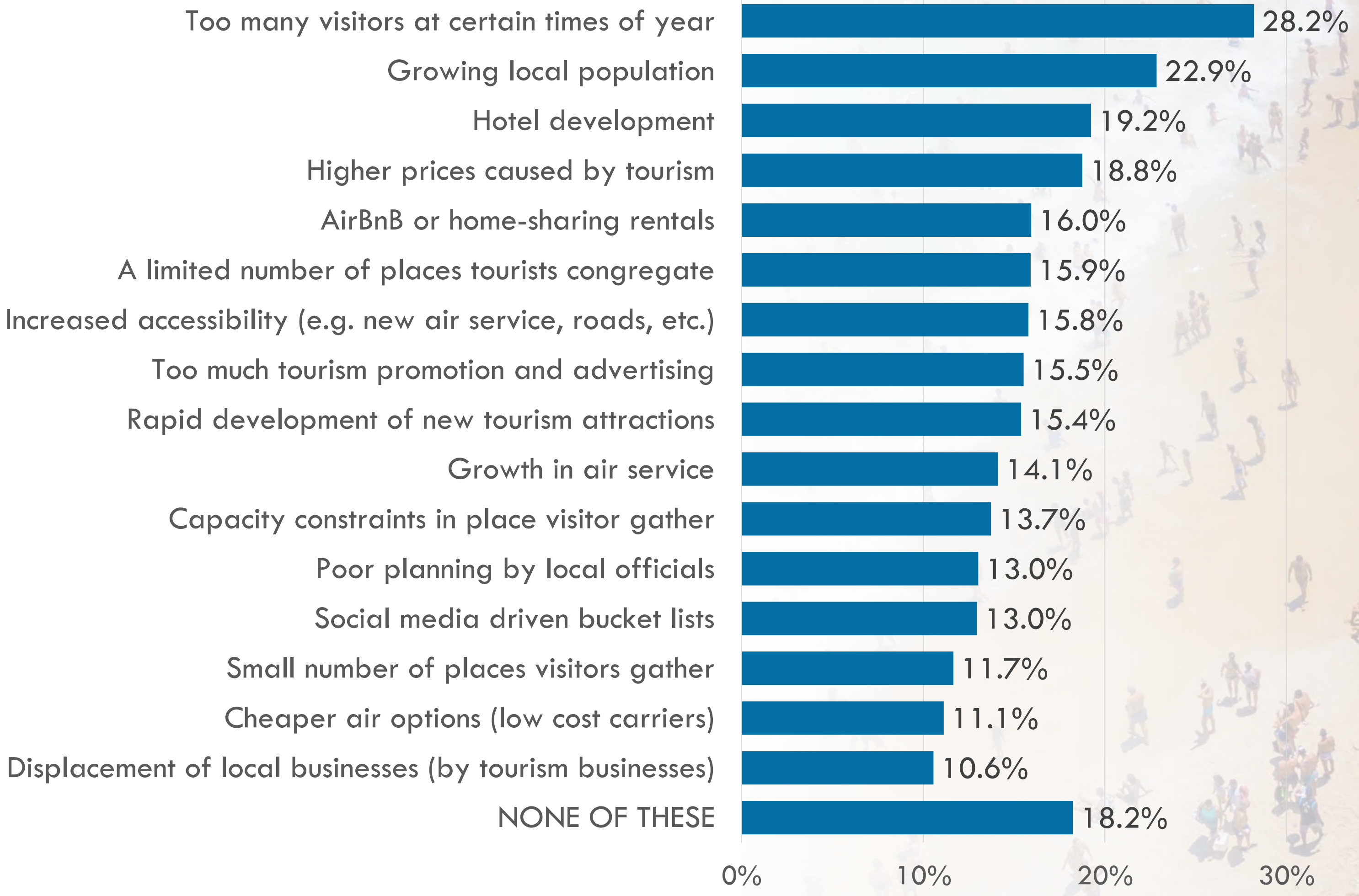
Statement: I live in a place that has an issue with OVER-TOURISM (i.e., a place that has too many tourists)

SERIOUSNESS OF OVER-TOURISM IN COMMUNITY



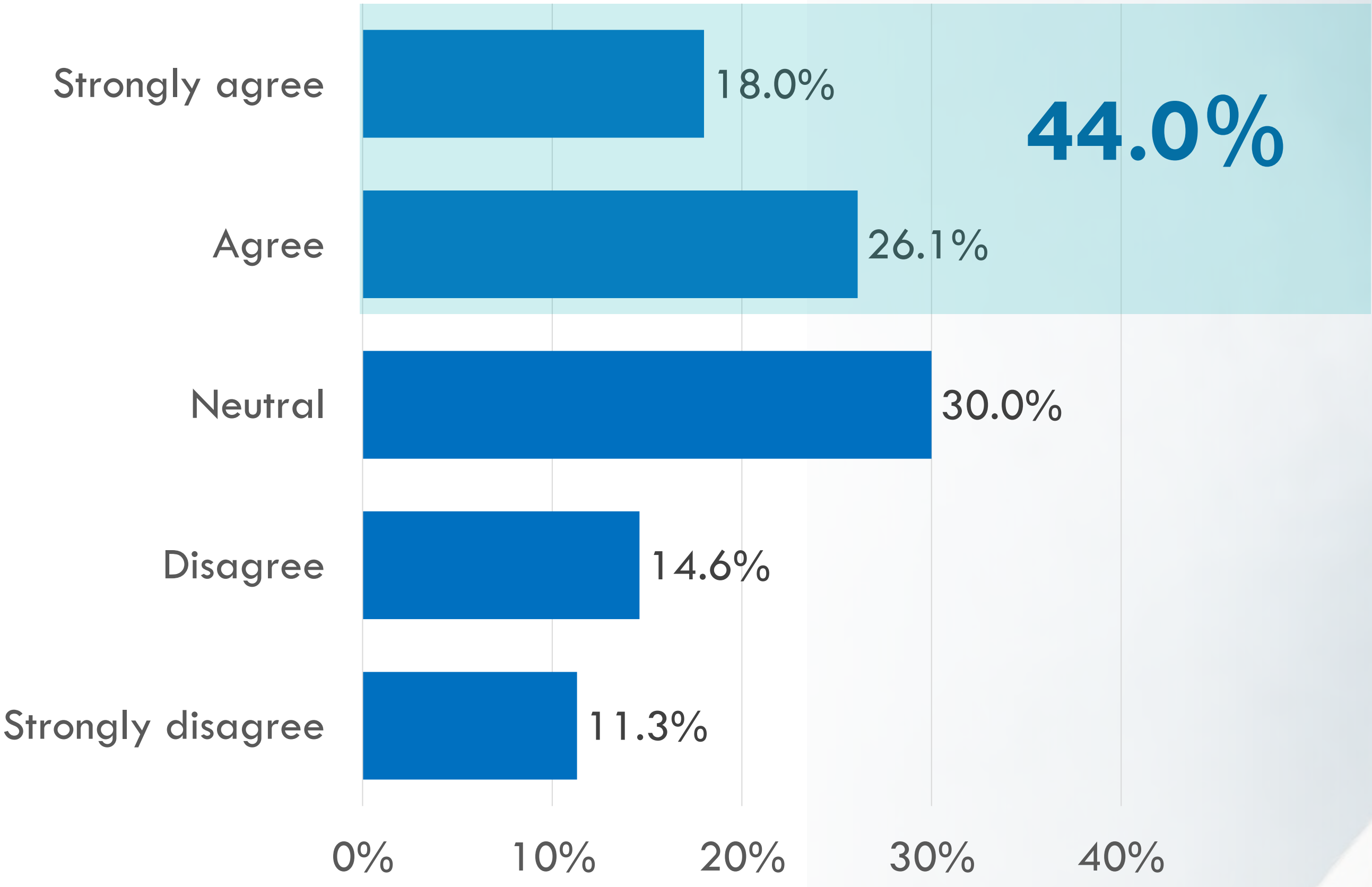
Question: How serious is the problem of OVER-TOURISM where you live? (Select one)

CONTRIBUTIONS TO OVER-TOURISM IN COMMUNITY



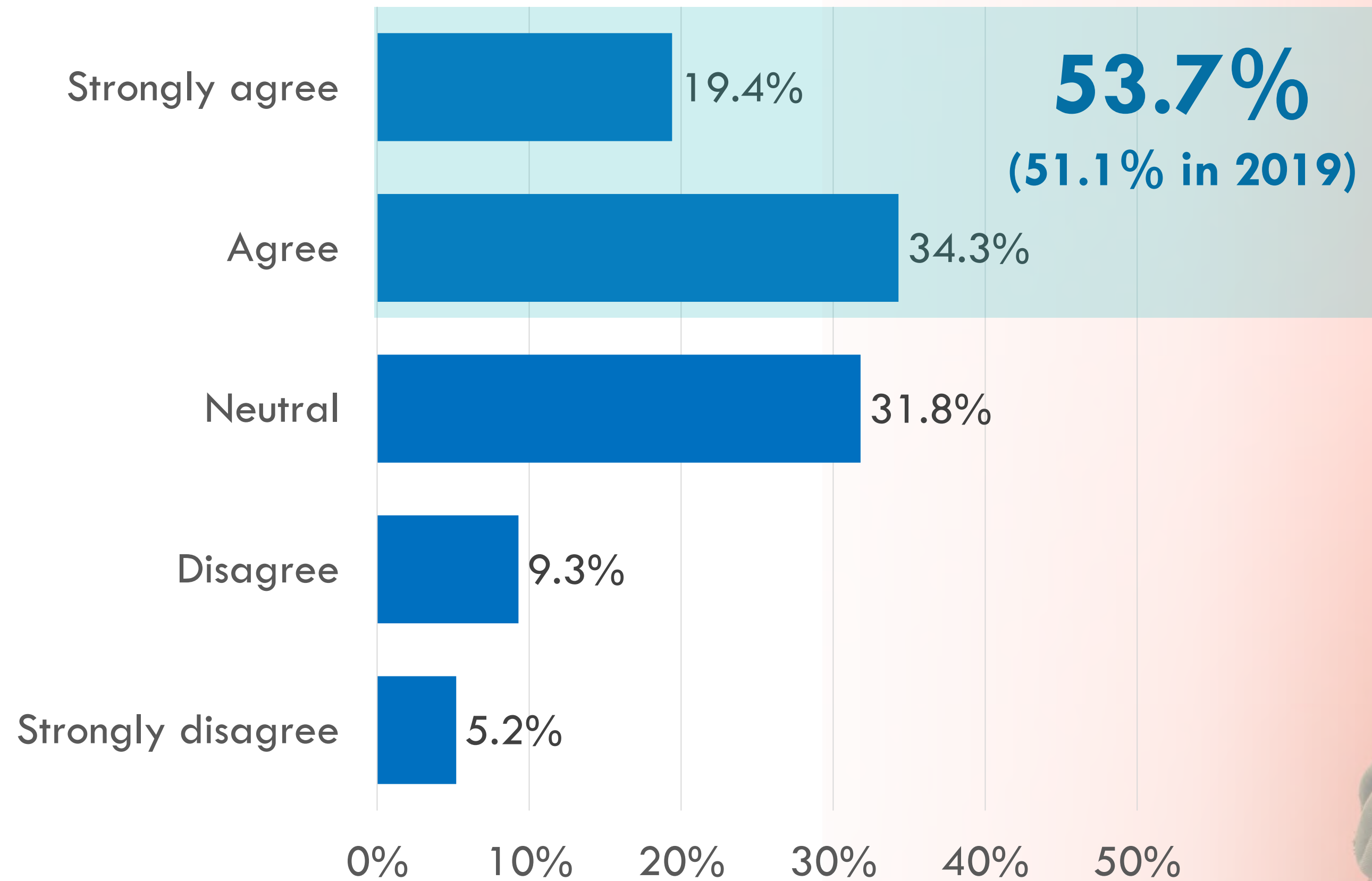
Question: Which of the following do you believe have contributed to OVER-TOURISM in your community?

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



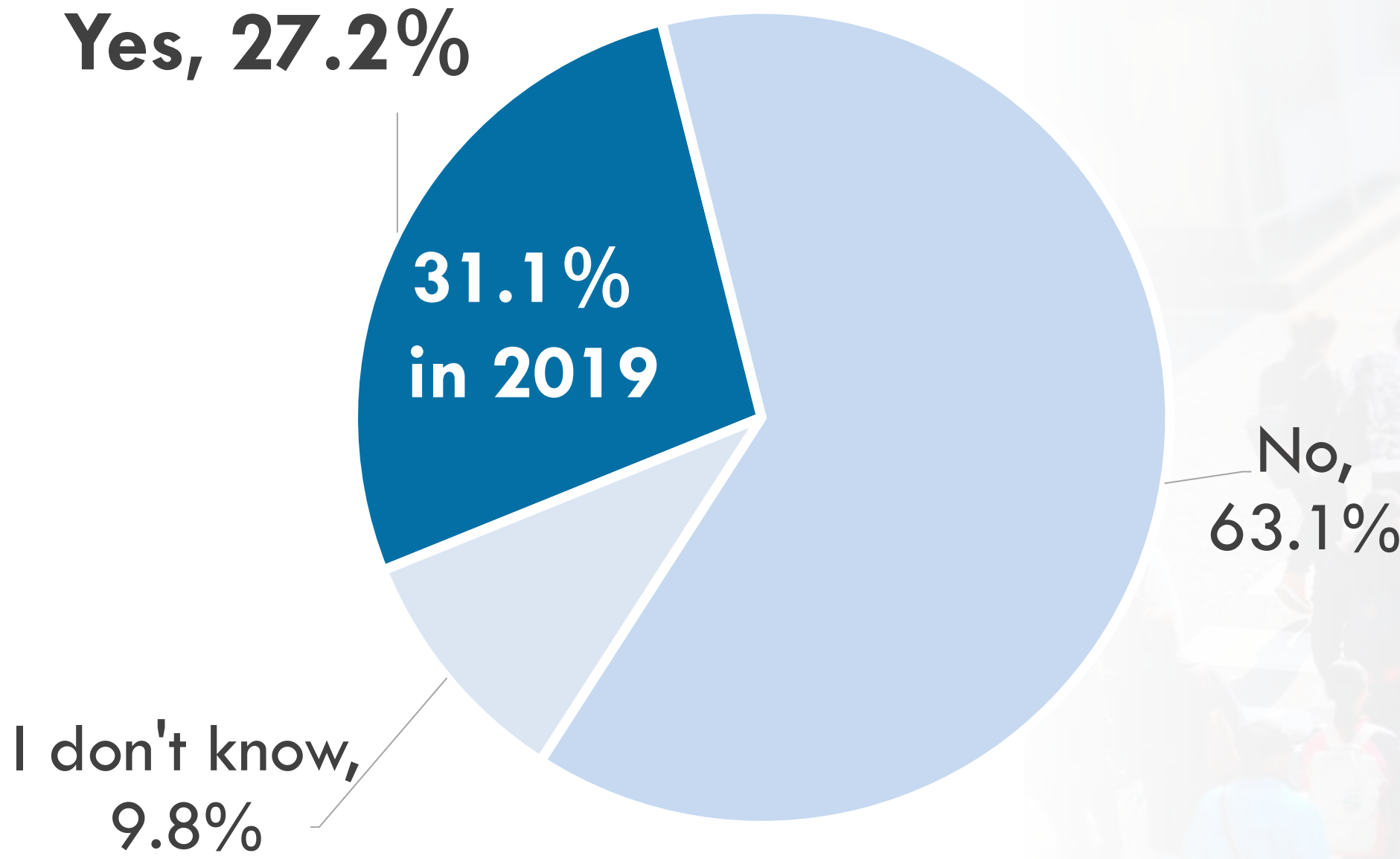
Statement: The pandemic has highlighted how important tourism is to my community. (Select one)

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



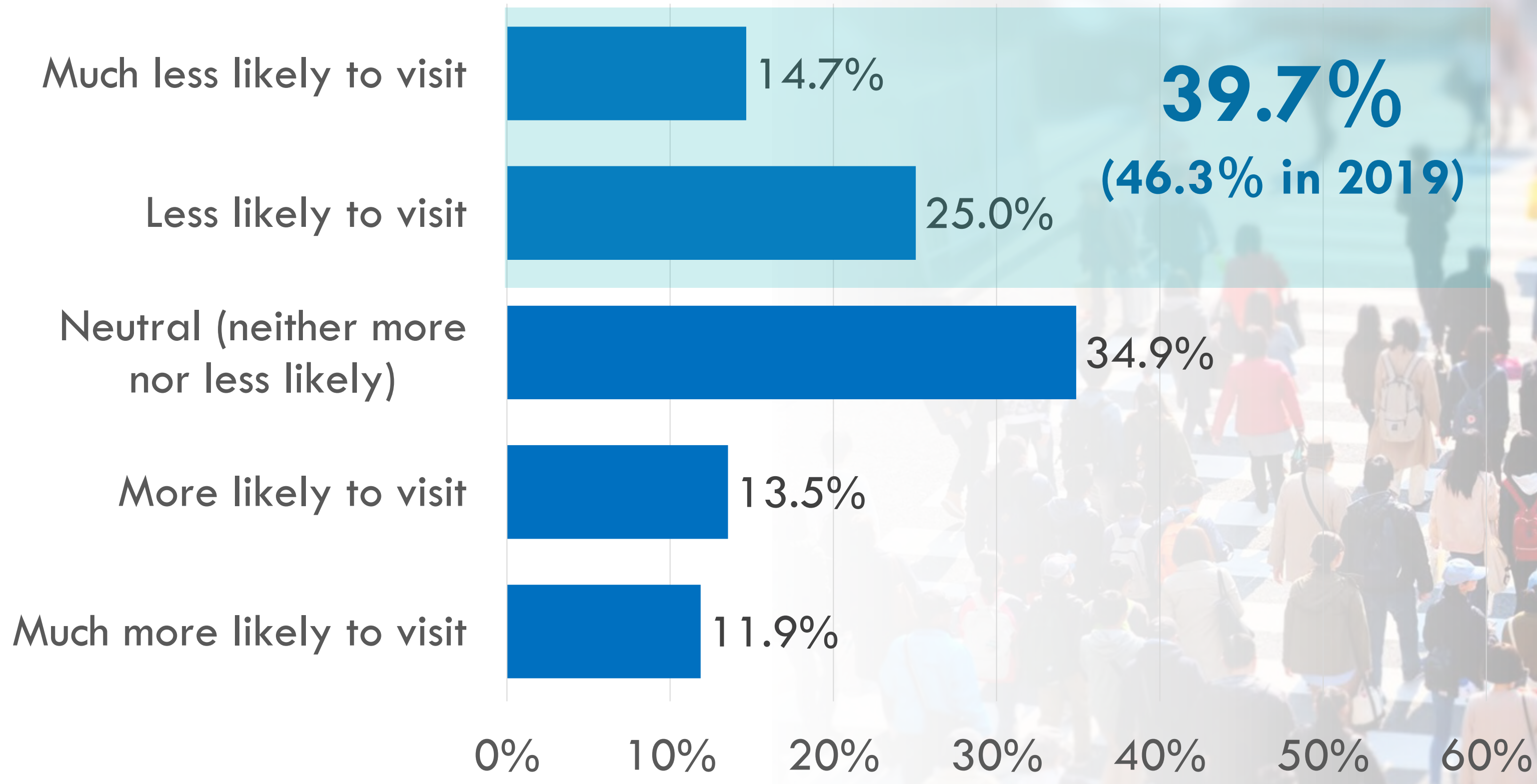
Statement: If a U.S. destination has a problem with OVER-TOURISM, I am less likely to visit it.

VISITED A DESTINATION FACING ISSUES WITH OVER-TOURISM



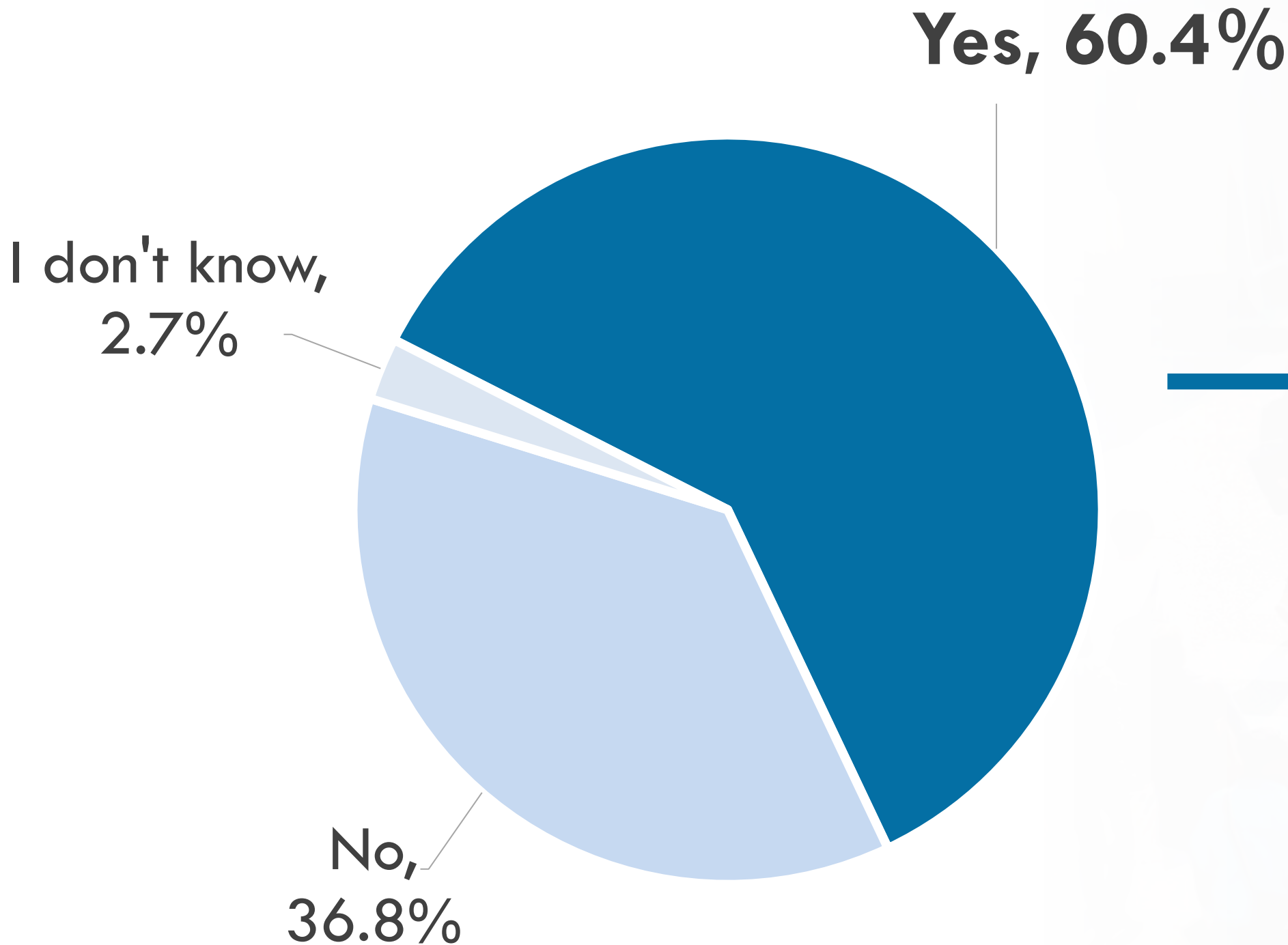
Question: In the PAST THREE (3) YEARS, have you personally visited a U.S. destination that you felt had an issue with OVER-TOURISM?

LIKELIHOOD TO VISIT DESTINATION FACING ISSUES WITH OVER-TOURISM AGAIN

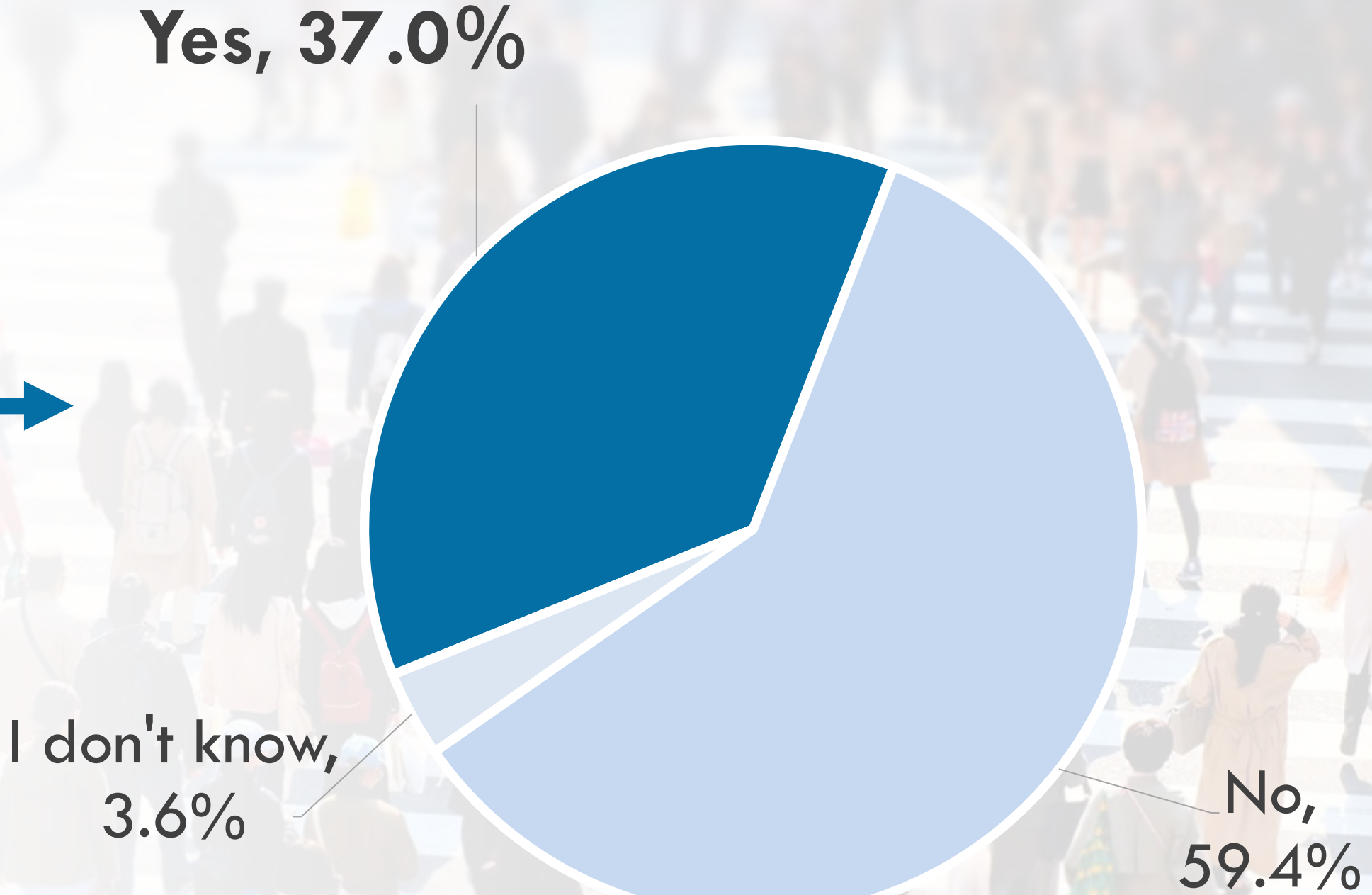


Question: Are you more or less likely to visit this place again?
Because of over-tourism, I am _____

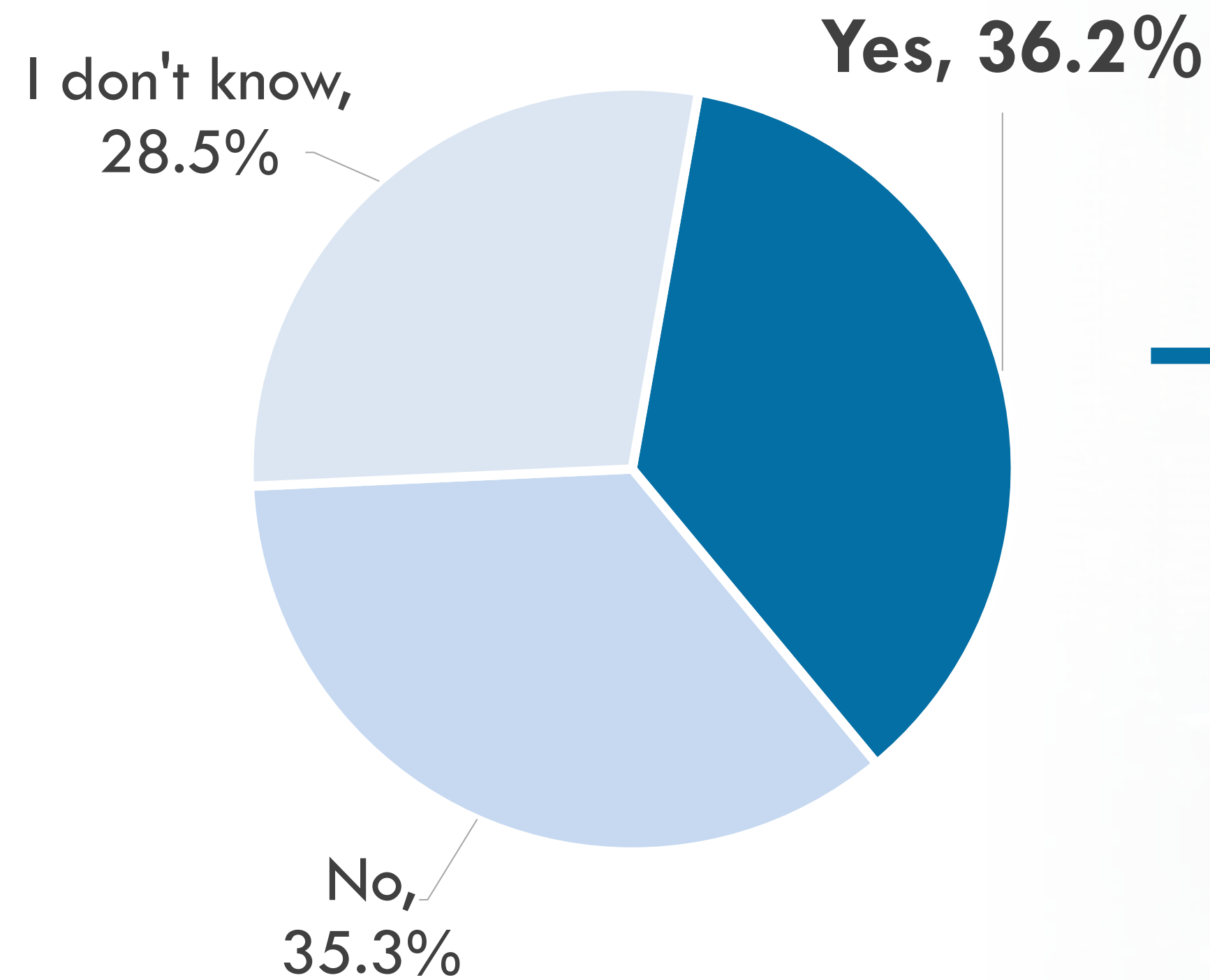
QUESTION: HAVE YOU TOLD ANY FRIENDS OR RELATIVES ABOUT THIS DESTINATION HAVING AN OVER-TOURISM PROBLEM?



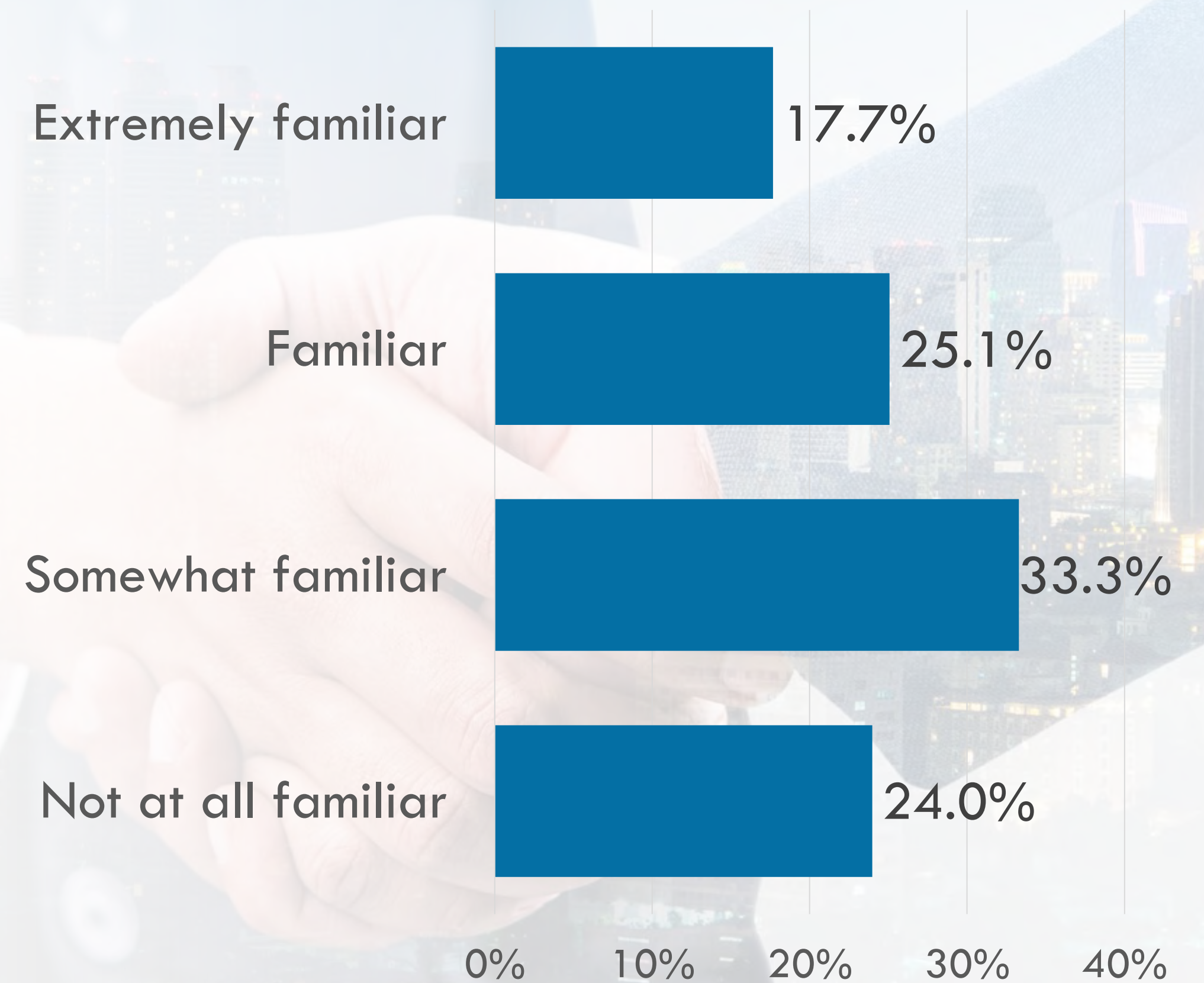
QUESTION: DID YOU RECOMMEND THEY NOT VISIT THAT DESTINATION?



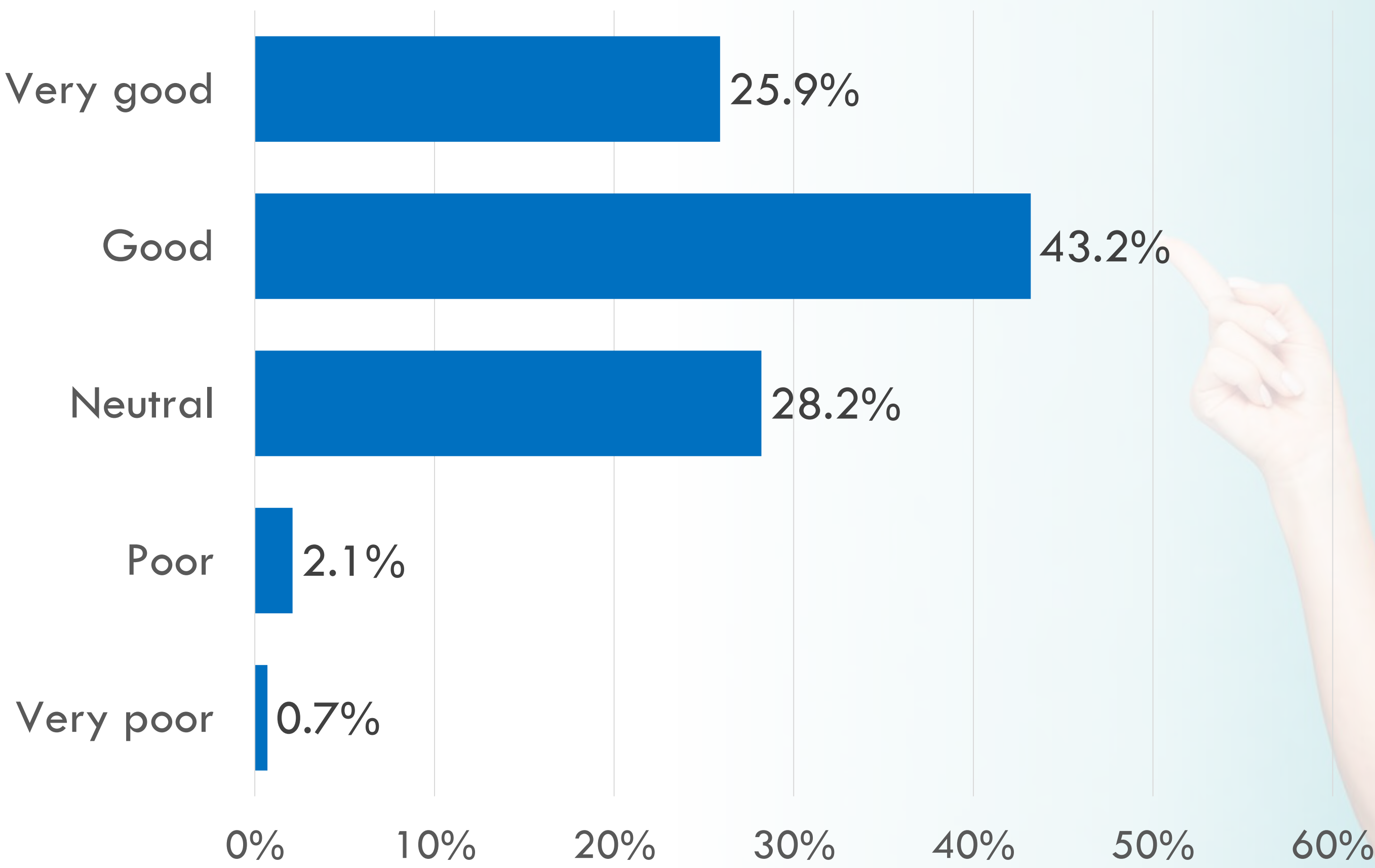
QUESTION: DOES YOUR COMMUNITY HAVE AN OFFICIAL DESTINATION MARKETING ORGANIZATION?



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

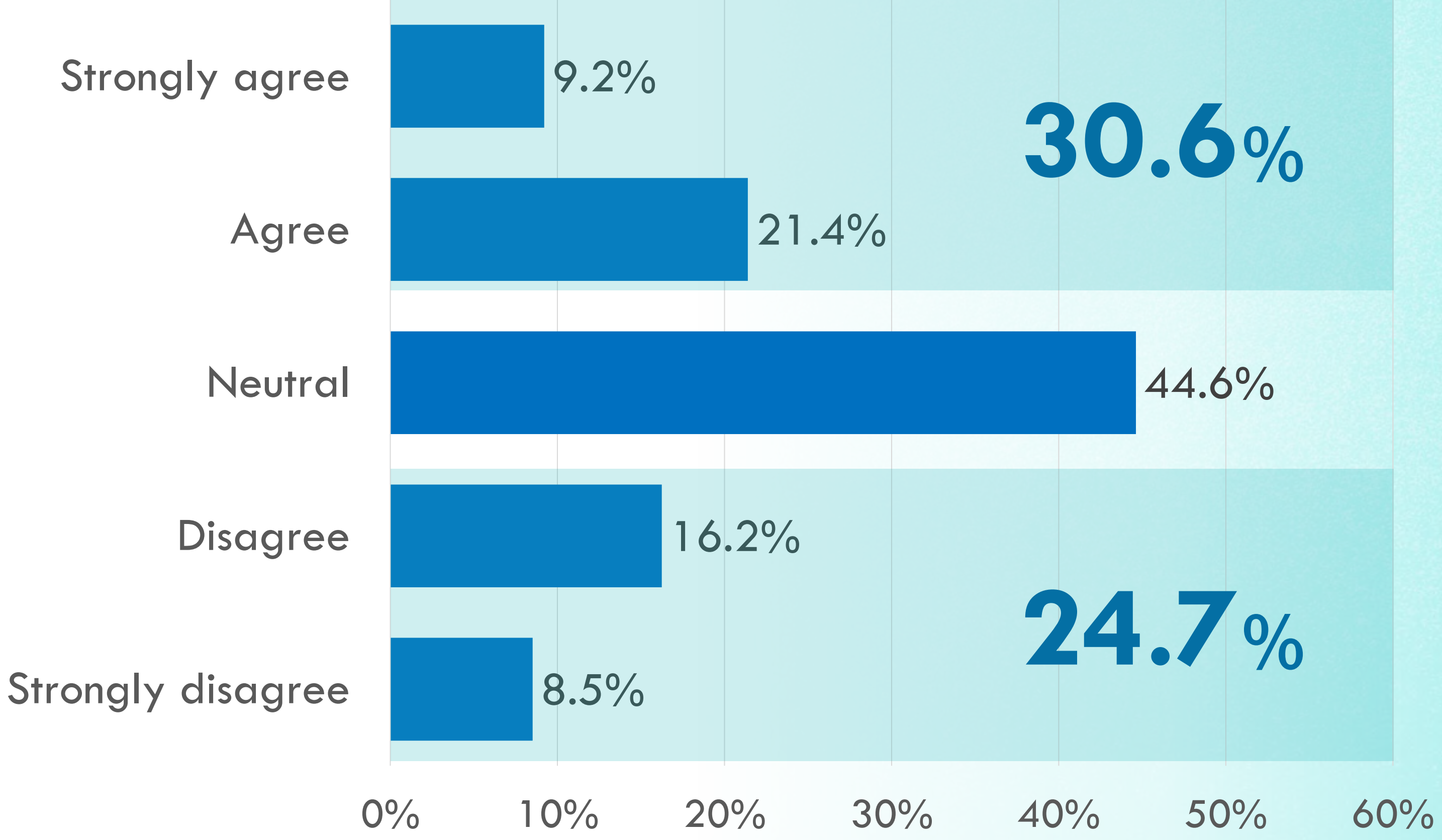


RATING COMMUNITY'S OFFICIAL TOURISM MARKETING ORGANIZATION



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

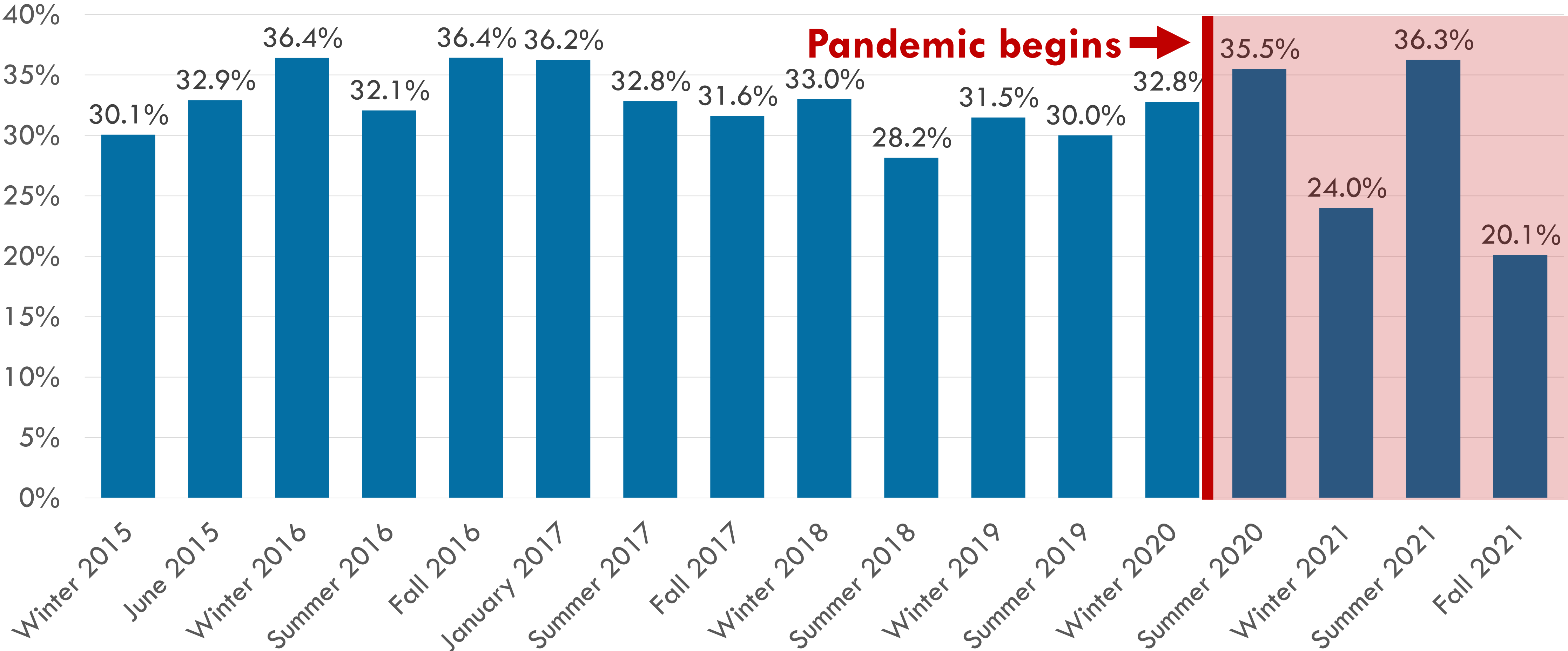
LIKELY TO USE OFFICIAL DMO TRAVEL PLANNING RESOURCES AS A RESULT OF THE PANDMIC




Statement: As a result of the pandemic, I am now more likely to use travel planning resources from official destination marketing organizations. (Select one)

Question: In the past 12 months, have you used the official WEBSITE of a destination's local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?

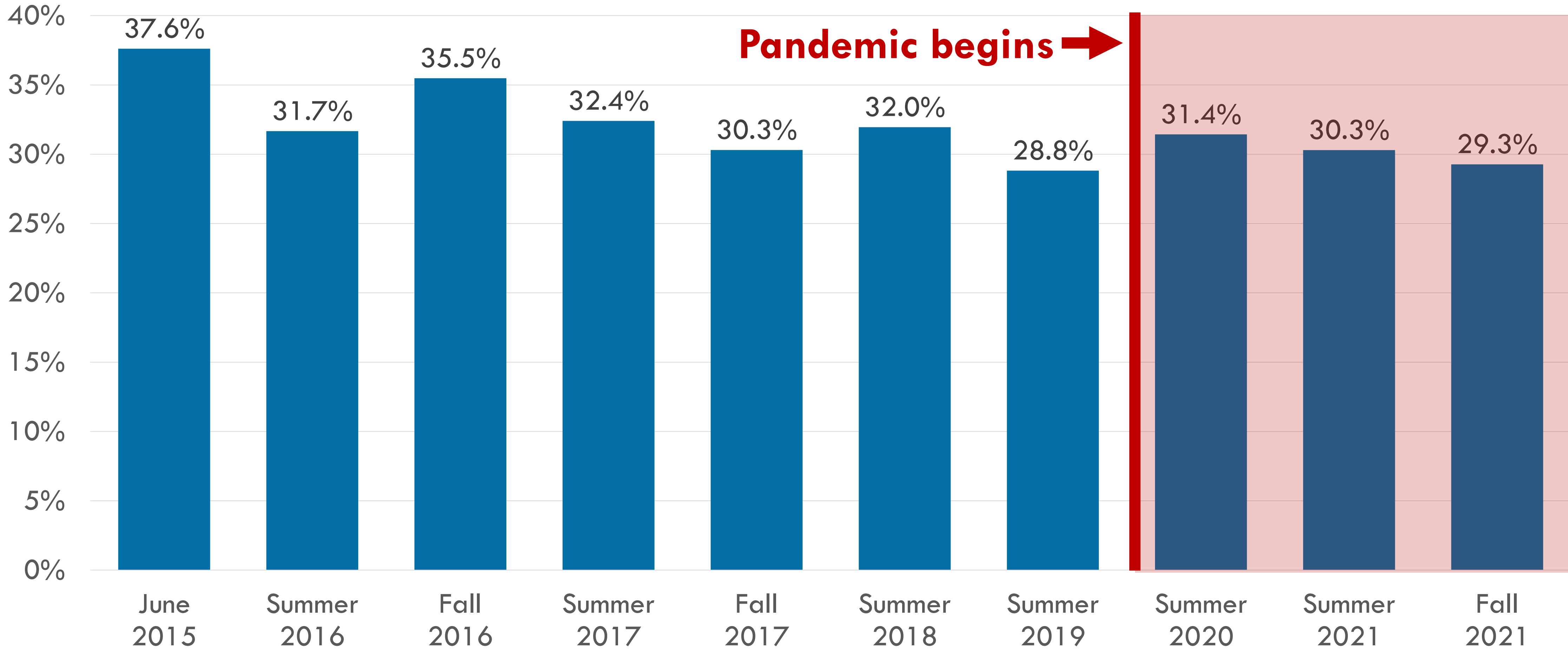
USE OF DMO WEBSITES





Question: In the PAST TWELVE (12) MONTHS while traveling for leisure, have you used resources from an official city, state or regional VISITOR INFORMATION CENTER?

USE OF DMO VISITOR INFORMATION CENTERS



TAKEAWAYS

1 Optimism in taking more leisure trips in the next year has exceeded pre-pandemic levels.

2 American travelers are growing more concerned about climate change and the environmental impact of travel, particularly younger generations.

3 Perceptions of overtourism are likely to affect future travel to a destination.

4 There's opportunity to boost awareness of official destination marketing organizations in local communities.

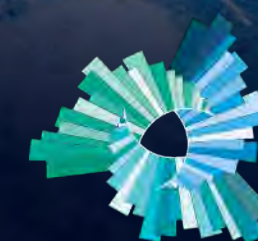


26 for COP26

26 Actions For Destinations & Their Tourism Industry to
Address Climate Change & Make Themselves More
Sustainable, Liveable & Welcoming to Visitors

miles
PARTNERSHIP

GROUP
NAC



GLOBAL
DESTINATION
SUSTAINABILITY
MOVEMENT



Travel Sustainable

Our sustainability recognition programme, accessible to all partners worldwide.

We believe in making sustainable travel choices easier for everyone. If done with respect for local communities, environments and biodiversity, travel can broaden horizons, reduce barriers and bring people closer together. We aim to promote a more sustainable travel industry, so we can collectively preserve a world worth experiencing.





PUBLIC TRANSPORT

FREE AIRPORT TO CITY TRAIN OR BUS TICKET

Example:
Geneva Airport
Free Train, Light Rail, Bus Ticket





NATURAL CLIMATE SOLUTIONS

CAPE CODE, MA: WASTEWATER & WETLANDS RESTORATION FUNDING

Example:
Cape Code, MA
STR Tax for Wastewater Project



In Collaboration with
McKinsey & Company



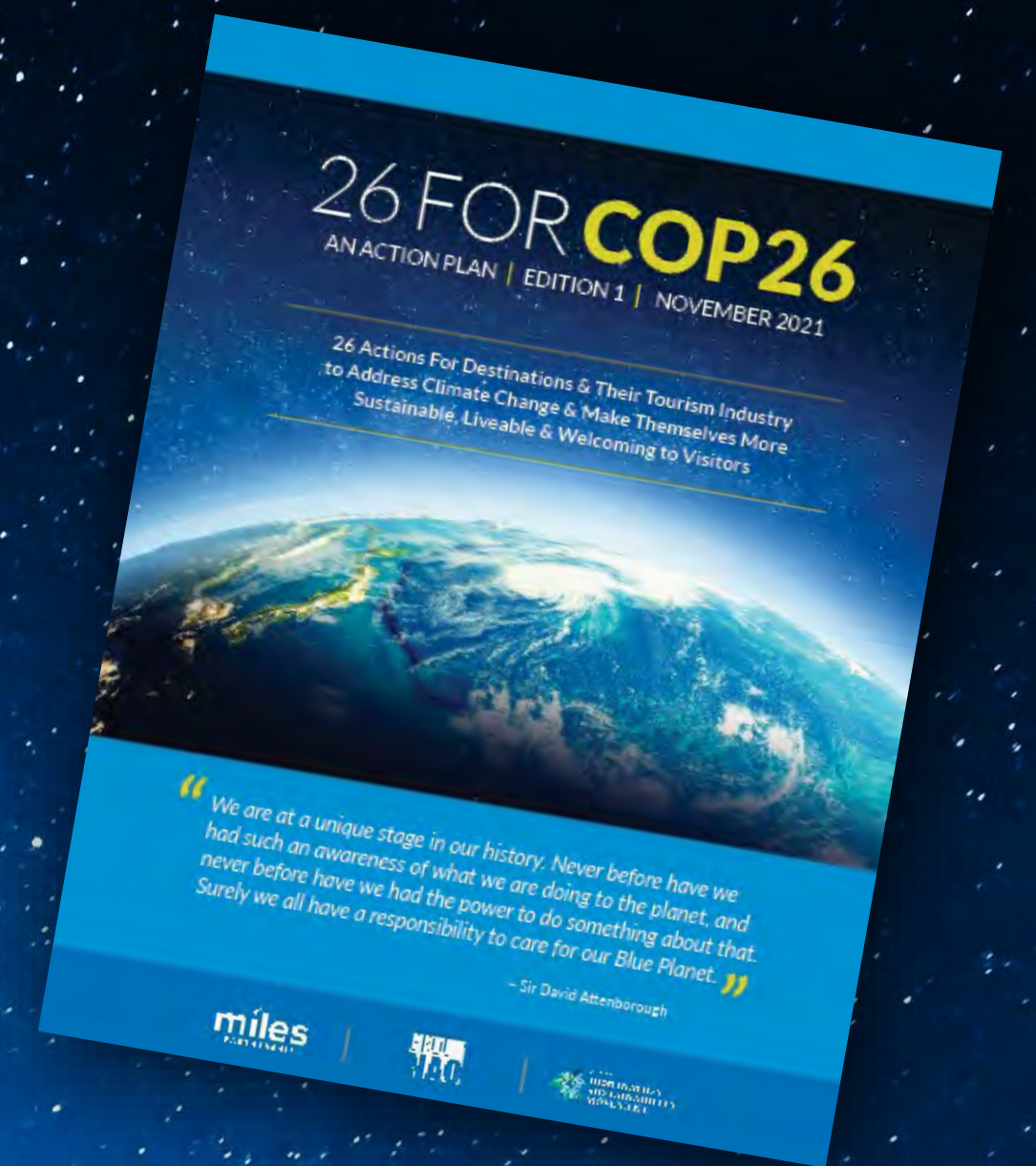
Nature and Net Zero

MAY 2021

26 for COP26

26 Actions For Destinations & Their Tourism Industry
to Address Climate Change & Make Themselves More
Sustainable, Liveable & Welcoming to Visitors

<https://www.milespartnership.com/26forCOP26>



Part One of Two,
Available Tomorrow!

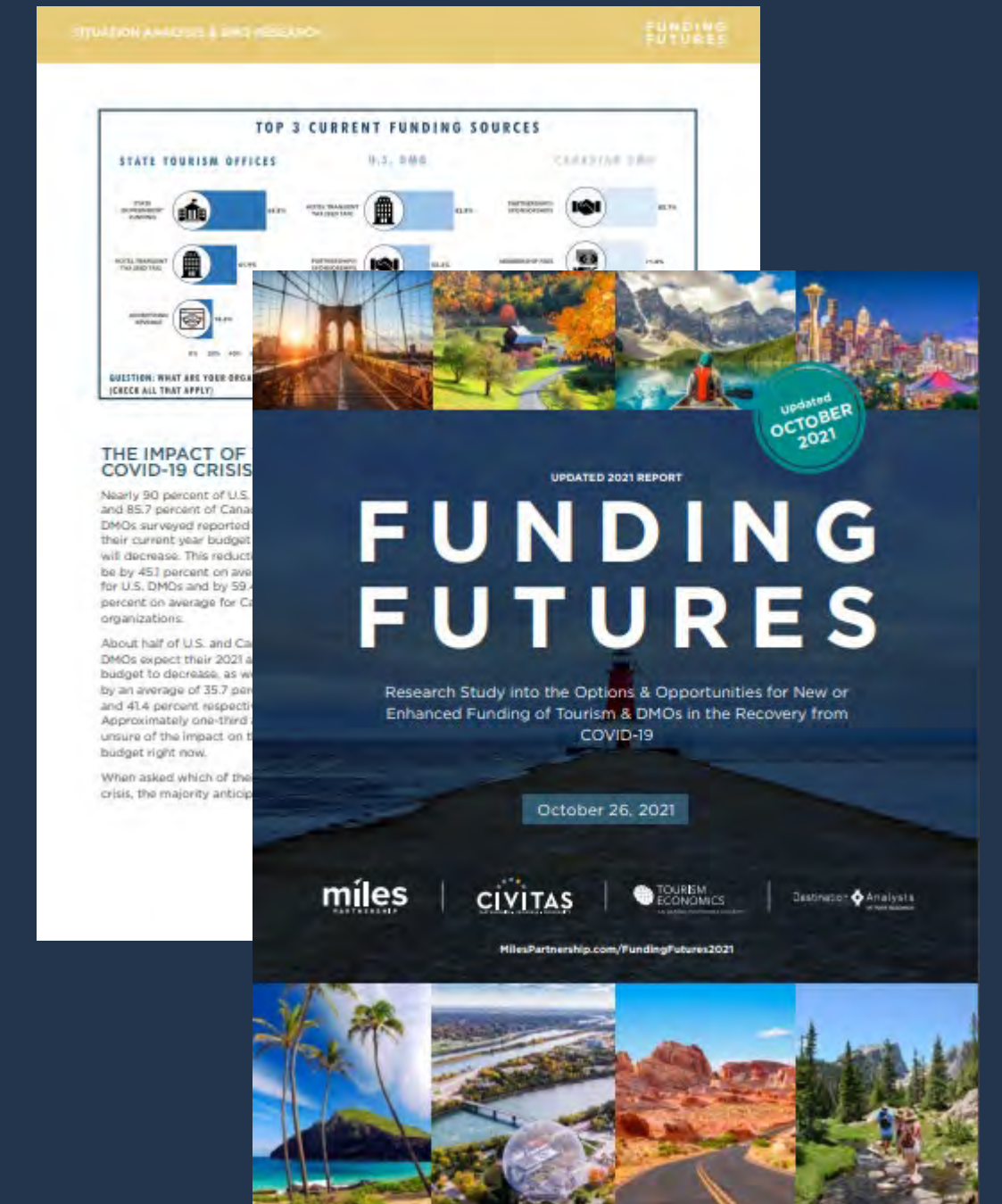




FUNDING FUTURES 2021 EDITION

An Update on Funding Options & Opportunities for Tourism & DMOs

www.MilesPartnership.com/FundingFutures2021



TIME FOR DEMOCRACY

A Global Study of Best Practices for Partnering
with Local Residents & Industry



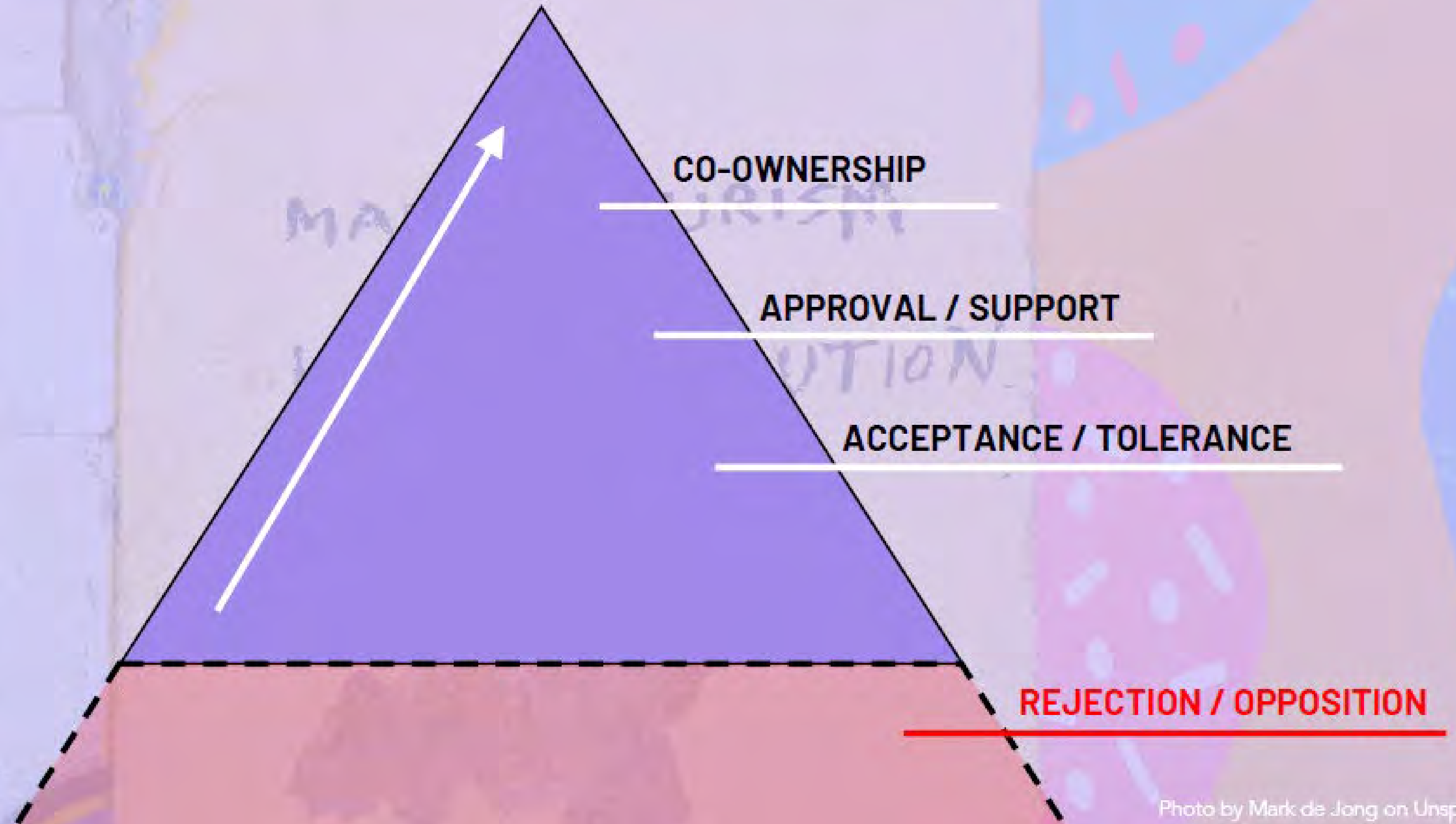
- Overview of European edition of study from Signe Jungersted, Group NAO
- Examples of global learnings & best practices that will be shared during study
- Summary of the North American & Oceania (South Pacific) Editions of study

TIME FOR

DMOCRACY



SOCIAL LICENSE TO OPERATE





@EKRA

PARTICIPATE MELBOURNE

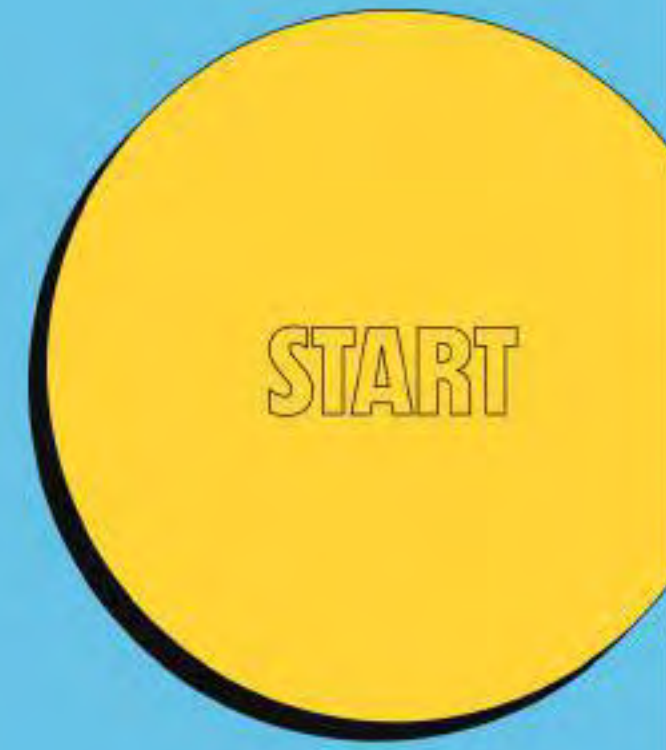


City of the future
How has this crisis changed your perspective on the future? Help us create a plan for a future Melbourne.

+ Follow

Home » City of the future

HAVE YOUR SAY IN LONDON'S FUTURE!



↓ Scroll down



Comment agir pour un **tourisme plus responsable** en France ?

PARTICIPER À LA CONSULTATION



Business Key West News

SHAPE UP OR SHIPS OUT? KEY WEST'S CRUISE SHIP DEBATE HEATS UP

By Mandy Miles - May 22, 2020

AGORA TOURiSM BORDEAUX

Bordeaux is committed to protecting the environment we all share, alongside stakeholders in the metropolitan area's tourism and events industry.



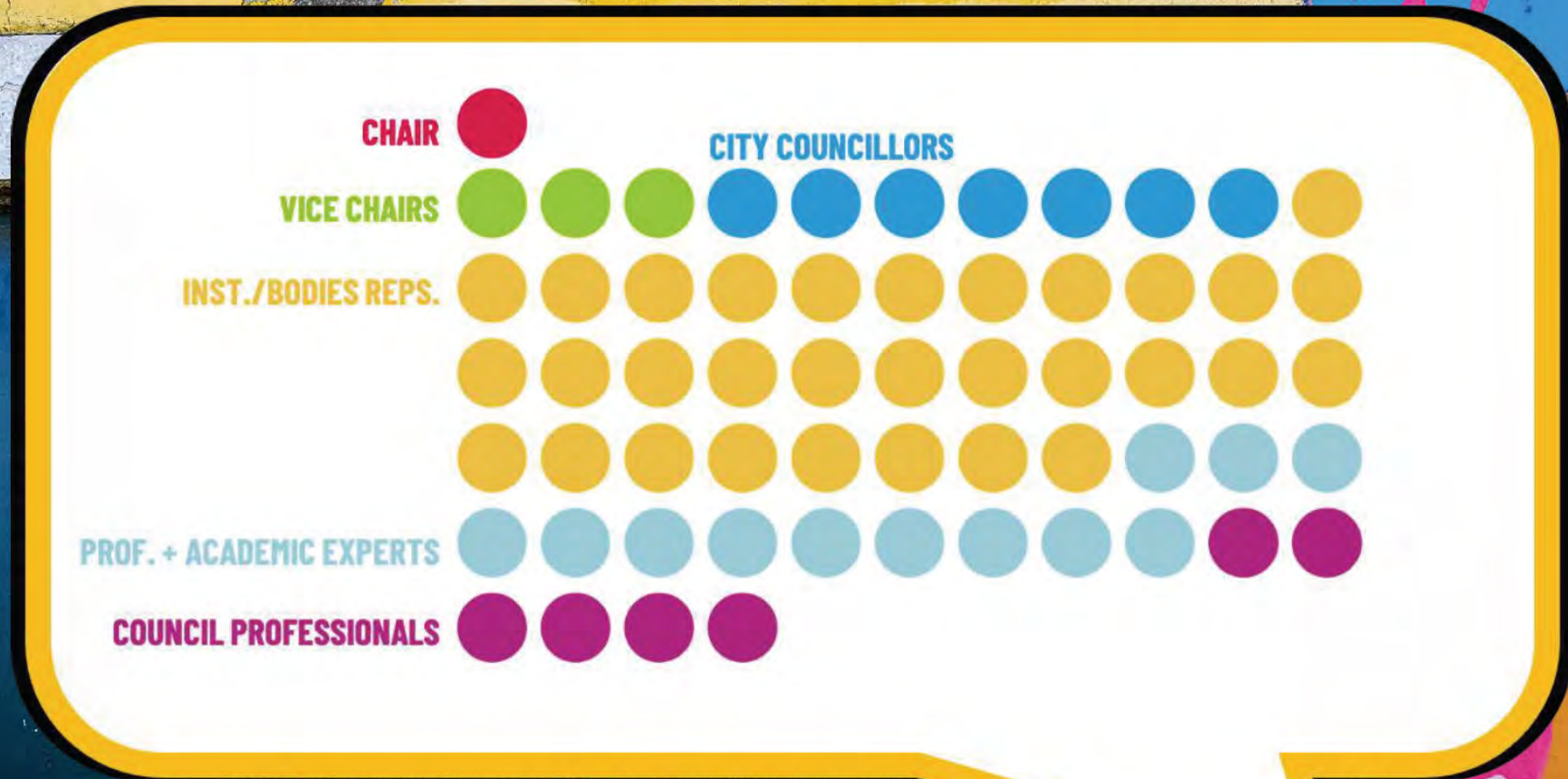
VISION 2025

REDESIGNING THE VISITOR ECONOMY OF AMSTERDAM

I amsterdam.



BARCELONA CITY TOURISM COUNCIL



INITIAL CURIOUS QUESTIONS

What is the level of trust from local populations to the DMO?

How is community participation and engagement motivated?

What are the existing democratic and participatory practices?

What goes in – and what goes out? Input, output & outcome?



SPECTRUM OF PUBLIC PARTICIPATION

	1. INFORM	2. CONSULT	3. INVOLVE	4. COLLABORATE	5. EMPOWER
PUBLIC PARTICIPATION GOAL	Provide public with balanced and objective information ; assist in understanding the issue	Obtain public feedback on analysis / decisions	Direct involvement with the public throughout the process to ensure public input are considered	Partner with public in all aspects of decision making , incl. development of ideas & solutions	Place final decision in your hands
PROMISE TO THE PUBLIC	We will keep you informed	We keep you informed, listen, acknowledge concerns, share feedback on how your input was used	We work with you to ensure your concerns and input are directly reflected in output	We will look to you for advice, ideas and innovation and use these as much as possible	We will implement what you decide

Adapted from model by: The International Association for Public Participation's Spectrum of Public Participation (2018)

OBJECTIVES

**A COLLABORATIVE
PROJECT - ADAPTING &
LEARNING THROUGHOUT**

TIME FOR DEMOCRACY

- **Map citizen participation & involvement in tourism**
- **Frameworks of democratic participation and governance**
- **Develop new models for future DMOCracies**

PROJECT TRACKS

CURIOUS QUESTIONS & COMMUNITY CHALLENGE

STATE OF DMOCRACY

(S) (D) (R)

Mapping current practices (DMO Survey), Desk research/ pilot cases), Resident Sentiment data analysis (issue mapping, comparisons, benchmark, developments)

FRAMEWORKS OF PARTICIPATION

(R) (E) (G)

Academic review of participatory models and frameworks, expert interviews and webinars, deep-dive governance and institutional set-ups, taxonomies

DIGITAL PLATFORMS & TOOLS

(M) (R)

Mapping and reviewing digital platforms for participation – How to operate and data process? What works, what doesn't?

METHODS OF ACTIVATION

(D) (L) (T)

Deep dive cases & learning labs, motivating participation and activating community: practice, methods and tools

PROJECT COMMUNICATION

(P) (C)

Project platform & events – transparent & sharing along the way. CPH bootcamp in May, Open conference mid-22.

WHITE PAPER, MODELS & METHODS OF DMOCRACY

EUROPEAN DESTINATION PARTNERS

MARKETING
LIVERPOOL

Visit **Tallinn**

ONLY LYON 
TOURISME ET CONGRÈS |

amsterdam &
partners®

 **Stockholm**
The Capital of Scandinavia

Welcome to
Zürich,
Switzerland.

Belfast

VISIT 

VISIT 
Greenland


VisitAarhus

visit.**brussels** 

simply 
MUNICH

WONDERFUL
COPENHAGEN 

**A
THE
NS** ATHENS
DEVELOPMENT
AND DESTINATION
MANAGEMENT
AGENCY

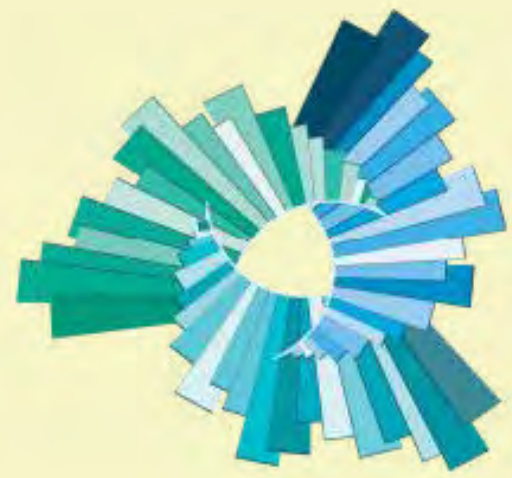
BORDEAUX
TOURISME &
CONGRÈS 

 Ajuntament de
Barcelona

 תל אביב
AVIV
יפו 

GROUP
NAO

INITIATING PARTNERS IN EUROPE



GLOBAL
DESTINATION
SUSTAINABILITY
MOVEMENT

theTravel
Foundation



FOR THOSE YET TO COME

TCI Research
Travel Competitive Intelligence

EUROPEAN CITIES MARKETING
MEET EUROPEAN CITIES



Photo by [Toa Heftiba](#) on [Unsplash](#)

TIME FOR
DEMOCRACY

Signe Jungersted
CEO & founding partner
www.groupnao.com

GROUP
NAO

The graphic features the word "DEMOCRACY" in large, white, bold, sans-serif capital letters. The letters are set against a dark red, rounded rectangular background. Behind this background are seven vertical, rounded bars of different colors: purple, teal, light blue, red, green, orange, and blue. The bars are arranged in a slightly staggered pattern, with some extending above and some below the red background.

TIME FOR
DEMOCRACY

North American & Oceania Editions

Time for DMOcracy: North American & Oceania Editions

A Global Study of Best Practices for Partnering with Local Residents & Industry

Study deliverables will include:

1. Global survey of how DMOs engage with residents & industry partners
2. Learning labs & focus groups – learn from experts & other global DMOs
3. In-depth case studies of programs & processes from around the world
4. Best practices & resources for resident & industry sentiment research
5. How to engage with diverse & minority communities
6. Survey of the best digital tools & platforms for engaging with residents & the industry
7. White papers & presentation of global best practices
8. Boot camp & conference



Time for DMOcracy: North American & Oceania Editions

A Global Study of Best Practices for Partnering with Local Residents & Industry

Limited Numbers: ~20 DMOs in North America

DMO Collaboration Groups: Major cities, small to medium-sized cities, etc.

Timeline: January to September 2022; wrap-up conference in October 2022

Cost: \$6,500 to \$9,500 USD per participating DMO

Expression of Interest. Indicate your interest at:

www.MilesPartnership.com/DMOcracy

We will share a project brief and follow up to answer questions.





Q&A

Destination  Analysts

miles
PARTNERSHIP

THE STATE OF THE AMERICAN TRAVELER: DESTINATION MANAGEMENT EDITION

Research, slides and other resources will be available at

www.milespartnership.com/SAT

www.destinationanalysts.com

Check out the Online Insights Dashboard,
Available Now!





[Home](#) [Webinars](#) [Insights](#) [Data Tracking](#) [Expert Sources](#) [Funding Futures](#) ▾

CLARITY IN A TIME OF CHANGE

A collection of research, resources and recommendations for DMOs and tourism organizations navigating COVID-19.

UPCOMING WEBINARS



Miles Partnership, along with our industry partners, has created and curated a resource center with essential insights and recommendations for DMOs and tourism organizations. These resources provide clear, timely answers to questions about COVID-19 and travel & tourism.

Webinars
COVID-19 Series & Industry
Webinar Resources

Data Tracking
Key Data Points from Our
Partners

Insights
Blogs, Articles and Resources
for Recovery

Expert Sources
Authoritative Government, Health
and Travel Sources



A scenic mountain landscape featuring a hiker sitting on a large rock by a calm lake. The hiker is wearing a blue jacket and a backpack. The background shows a dense forest of evergreen trees and a large, rugged mountain peak with patches of snow. The sky is clear and blue.

Q&A

Thank you!

Destination  Analysts

miles
PARTNERSHIP