



With You



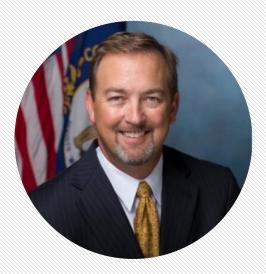
Chris AdamsHead of Research & Insights
Miles Partnership



Liz FitzsimmonsExecutive Director
Maryland Office of Tourism



Amir Eylon President & CEO Longwoods International



Mike Mangeot

Commissioner

Kentucky Department of Tourism



RESEARCH AND ADDITIONAL RESOURCES



www.milespartnership.com/usa-road-trips



RESEARCH & INSIGHTS ON ROAD TRIP TRAVEL ACROSS THE USA

Research from Longwoods International and Analysis and Insights from Miles Partnership



USA ROAD TRIPS RESEARCH SUMMARY

Full research and resources are available at milespartnership.com/usa-road-trips

20% **LONGER & MULTI STATE** vs. 11% ROAD TRIPS 21% of all U.S. eisure Trave 28% of Road Trips are Long -

New Visitors

7%

16%

% indicates the share of all U.S. road trips to this region in 2019

TRANSPORTATION

5 nights or more

45% of Spending

Longer Road Trips account for almost half of spending 67% that Visit 3+ States

have a trip of 5+ nights

Own Car	10%
Rental Car	14%
Camper/RV	30%
Motorcycle	1%



35% of U.S. travelers are not planning any travel but for those that are:

- 60% of U.S. travelers will travel by car for their next trip
- 40% will travel by car to visit friends or relatives (VFR)
- 23% will go on a VFR trip within 200 miles; 17% more than 200 miles
- 20% will travel by car on a leisure trip (not incl. VFR)
- 12% will go on a leisure road trip within 200 miles; 8% more
- 15% will take a staycation; incl. using their car for local trips
- 22% will fly within the U.S. and 1% internationally

*As of September 2020, COVID-19 Travel Sentiment Study, Longwoods

WH OT

HIS BA

AFI

AM

\$50

OV

GENDER

51% FEMALE • 49% MALE

FAMILIES

33% TRAVELING WITH KIDS

EDUCATION

66% COLLEGE DEGREE

9%



10%

MAJOR U.S. TRAV

Addressing these concerns is constimulating road travel

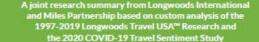
86% are confused about trave restrictions and rules on

Agreed with one or more of these statements as

- Health & safety protocols are unclear or v

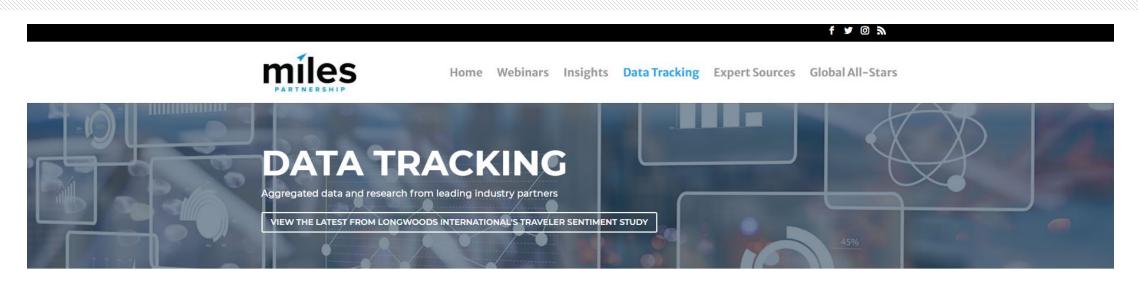
40% do not feel safe traveling outside their community

"As of August 2020, COVID-19 U.S. Travel Sentiment Study, Lox



Longwoods

Covid19.MilesPartnership.com



Miles is curating and summarizing critical data points from the industry's leading research and data providers including UberMedia, Longwoods International, Destination Analysts, SparkLoft, ADARA and others.

7 DATA POINTS TO SHOW THE IMPACT ON TRAVEL

Updated September 8, 2020

Data Point 6: Road Trips are Back, 15-25% below 2019

Where Are We Going? Road Trips Revisited!

Fresh research & insights on marketing to **US Road Trip Travelers** Longwoods

Longwoods International



- Established in 1978 as consultancy-focused research company
- Tourism since 1985
- Travel USA ® since 1990





Methodology (short version):

Travel USA®

- Largest ongoing study of American travelers
- Quarterly random samples of U.S. adult population
- Consumer online panel
- Profiles of representative sample of 300,000+ overnight and day trips each year
- Overview survey, then a custom follow-up







After Looking Back 20+ Years... and at the Current Situation...

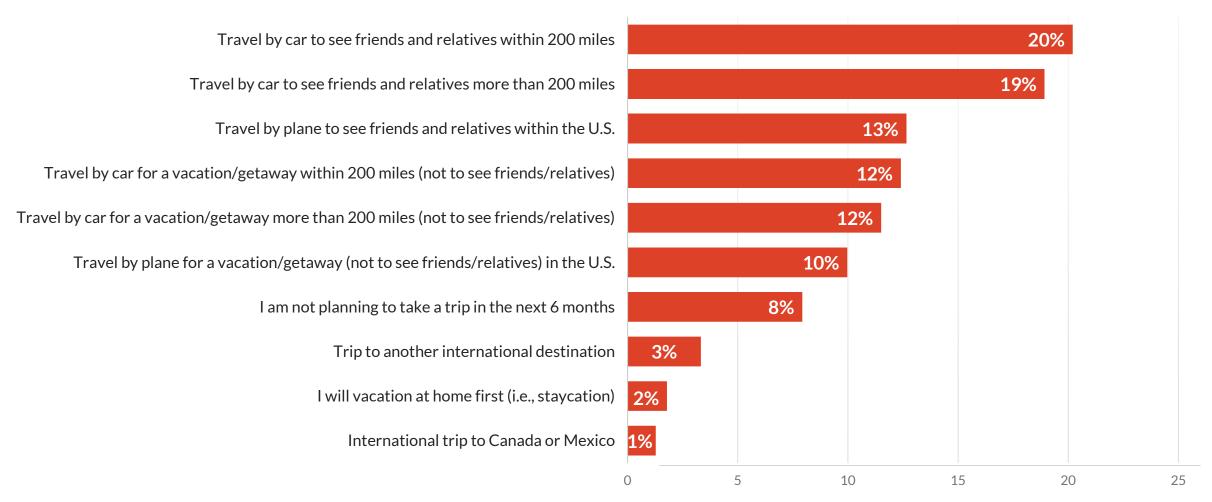


1. Road Trips Will Lead Us Into Recovery!



IMPACT ON TRAVEL PLANS - APRIL 29

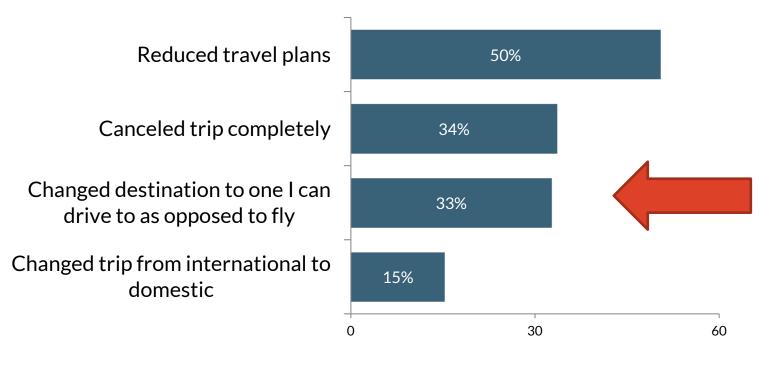
First Trip Travelers Plan to Take in the Next Six Months







of travelers planning to travel in the next six months will change their travel plans due to coronavirus

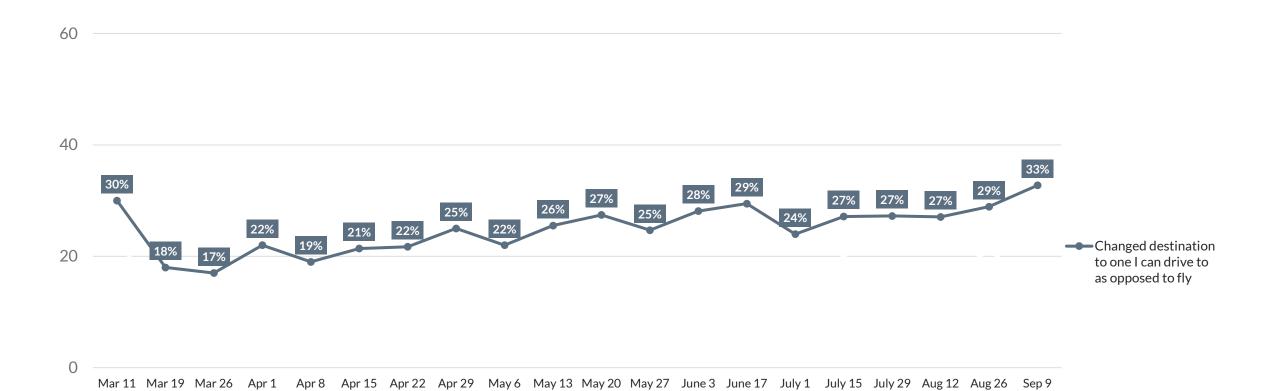


Base: Coronavirus Changed Travel Plans





Impact of COVID-19 on Upcoming Travel Plans: Change From Fly to Drive

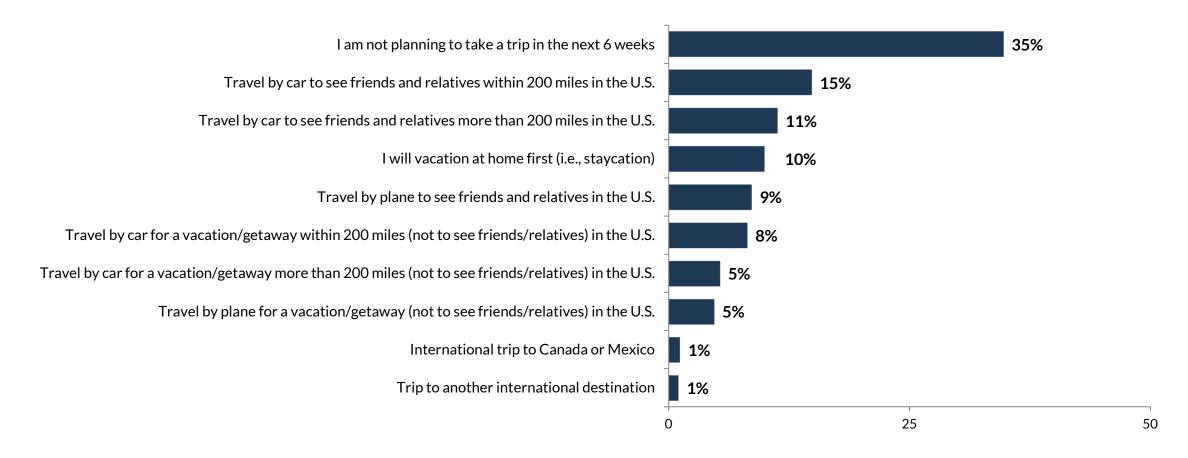


Base: Coronavirus Changed Travel Plans





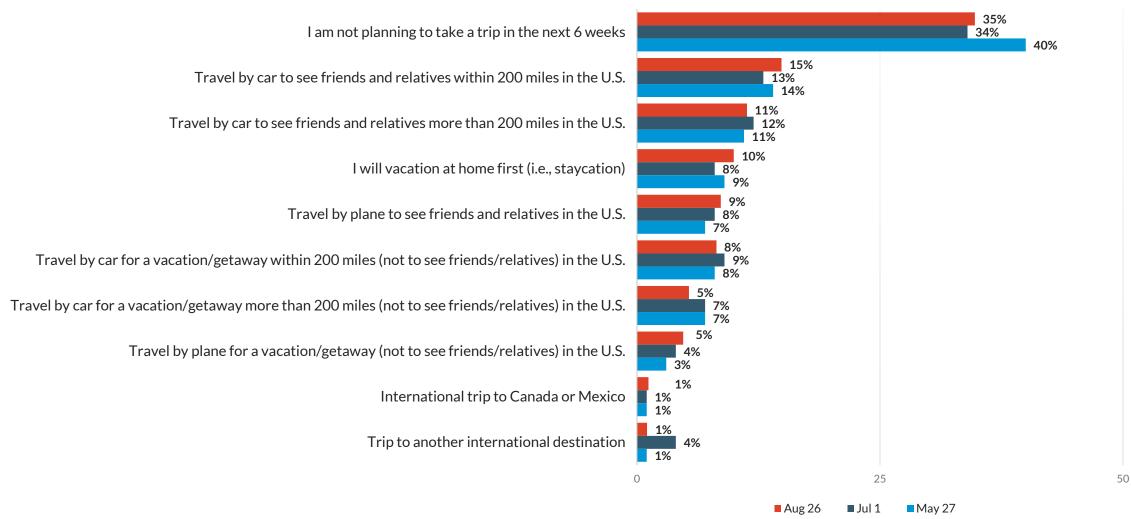
First Trip Travelers Will Take in the Next Six Weeks





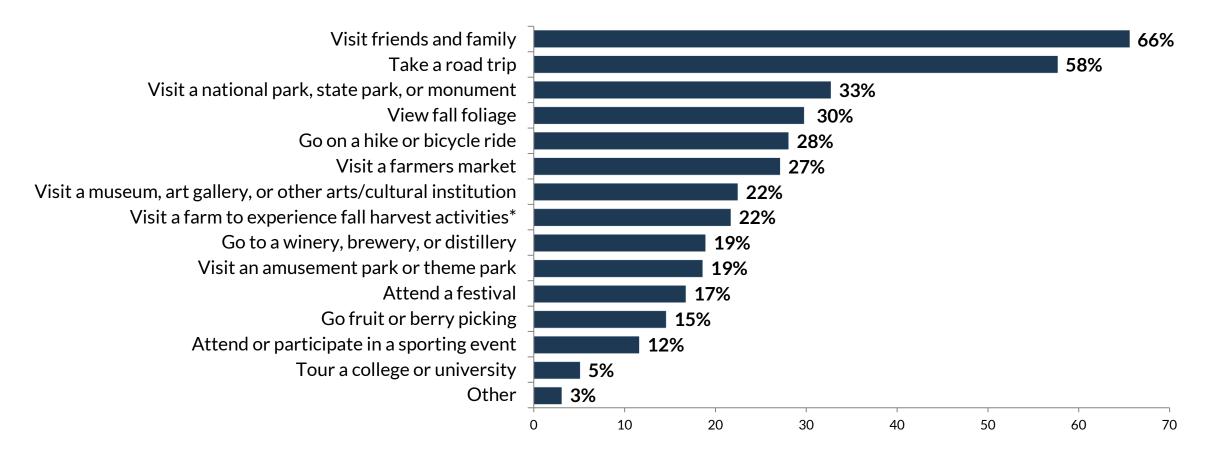


First Trip Travelers Will Take in the Next Six Weeks





Activities Travelers Plan to Participate in During Their Fall Travels



^{*}Corn maze, hay rides, pumpkin patch, etc.



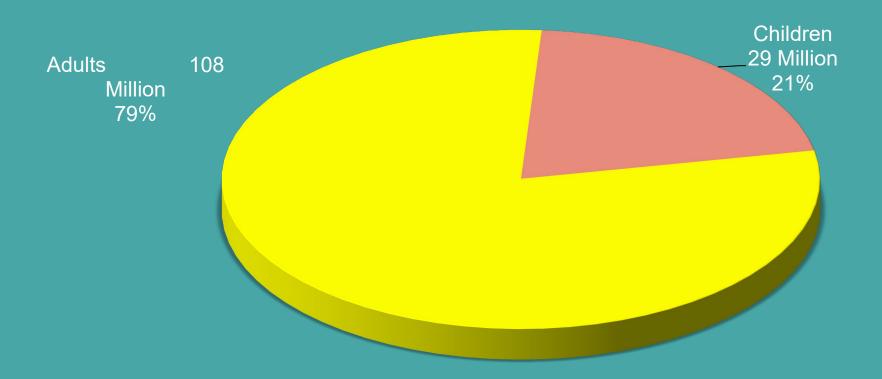


2. Road Trips are Still a Hidden Gem!



Total Size of Road Trip Segment in 2019

Total Overnight Road Trips = 137 Million

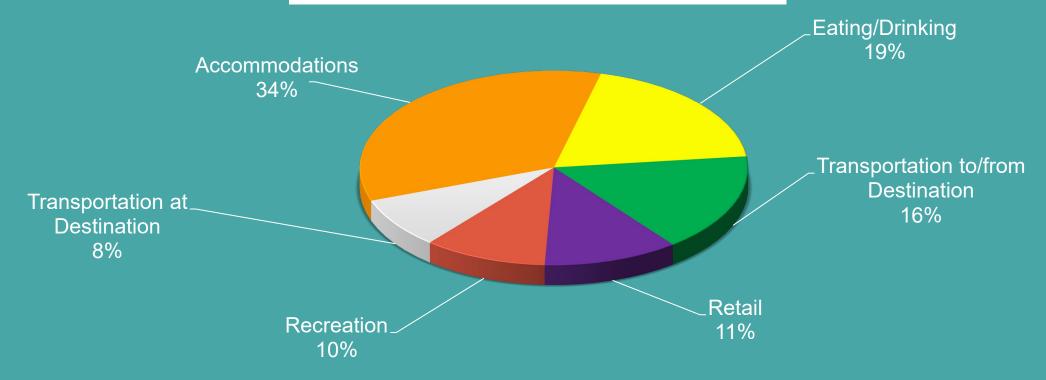






Total Spending on Road Trips in 2019 — by Sector

Total Spending = \$51.3 Billion







3. Road Trips Were & Are a Growing Market!



Road Trip Segment

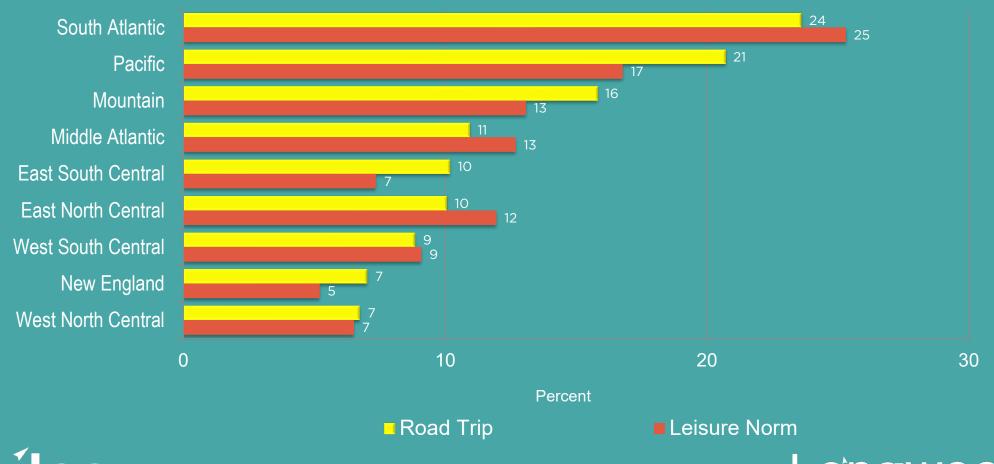
Base: Overnight Trips







Regional Destination of Trip



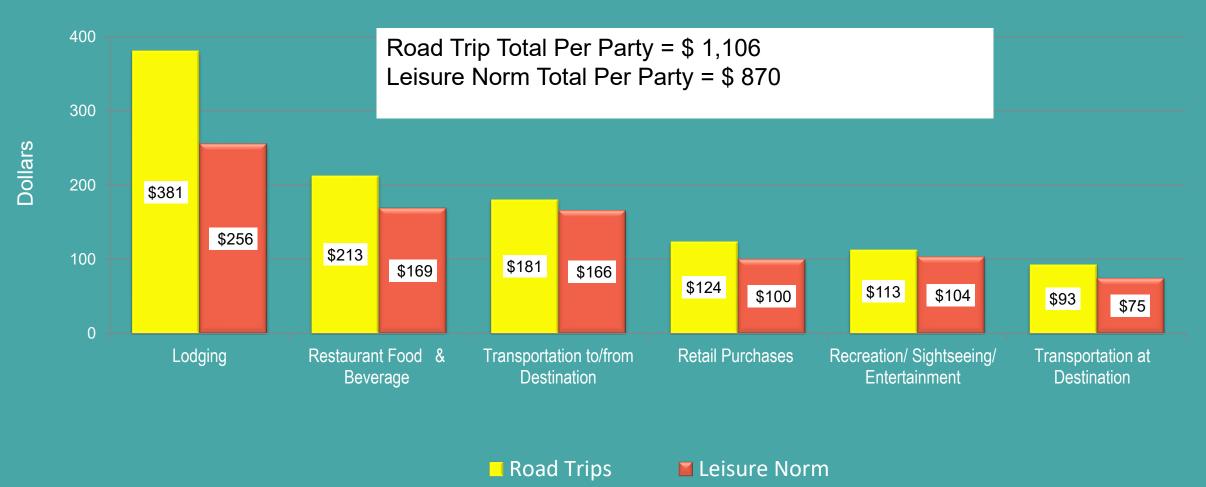




3. Road Trippers are Valuable!



Average Per Party Expenditures — By Sector







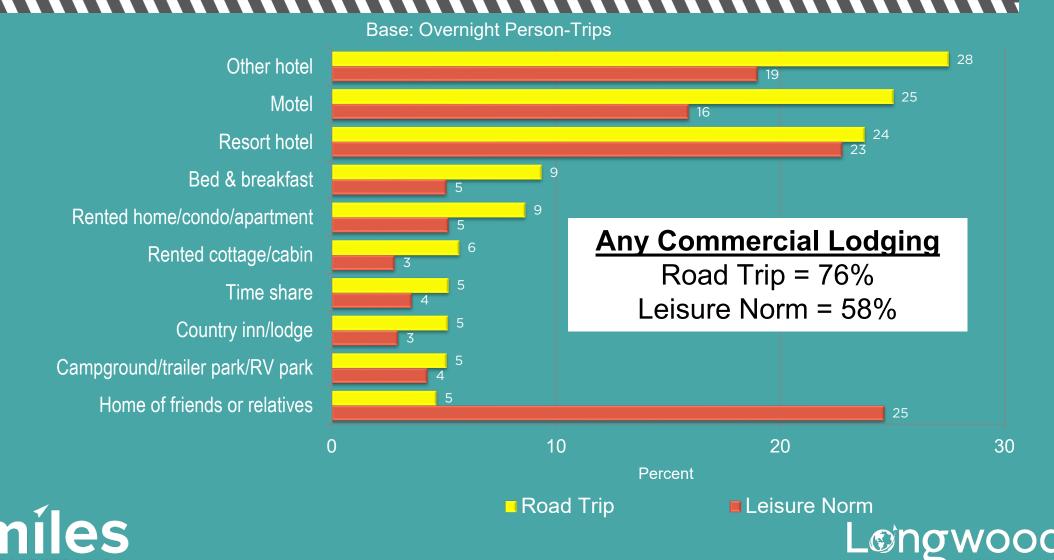
Past Visitation to Destination



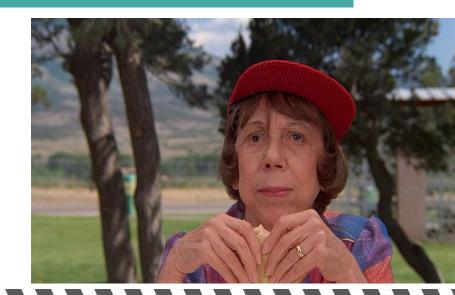




Accommodations



4. Road Trippers are Unique!



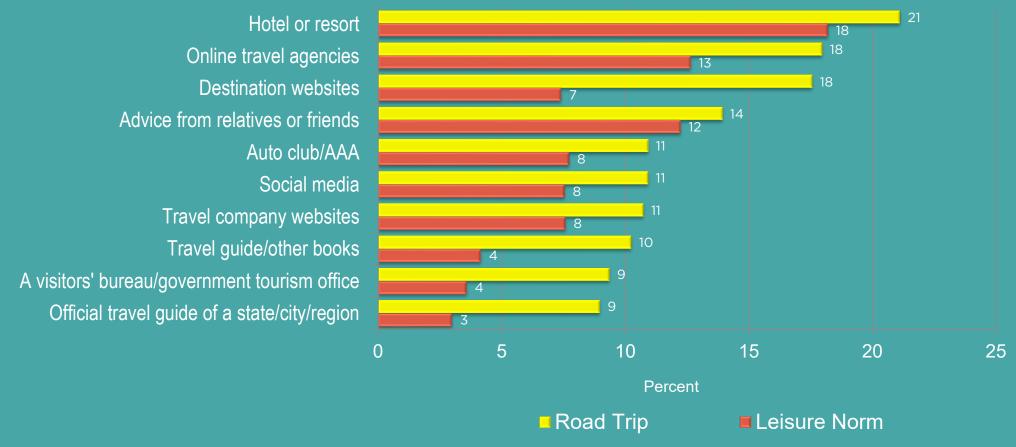
Length of Trip Planning







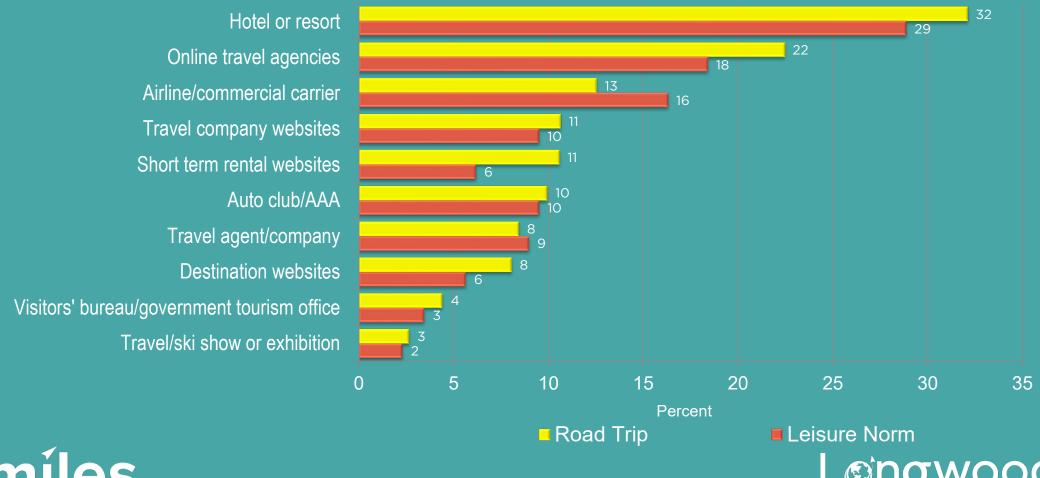
Trip Planning Information Sources







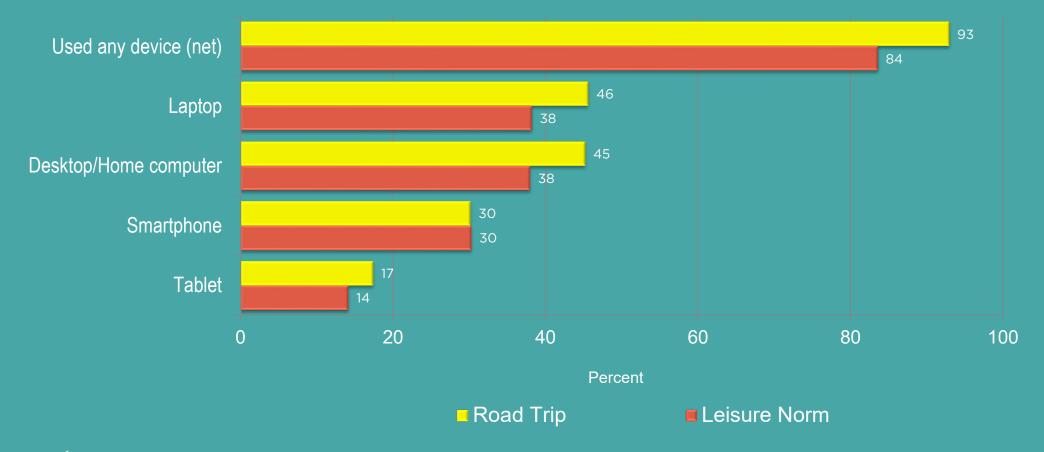
Method of Booking







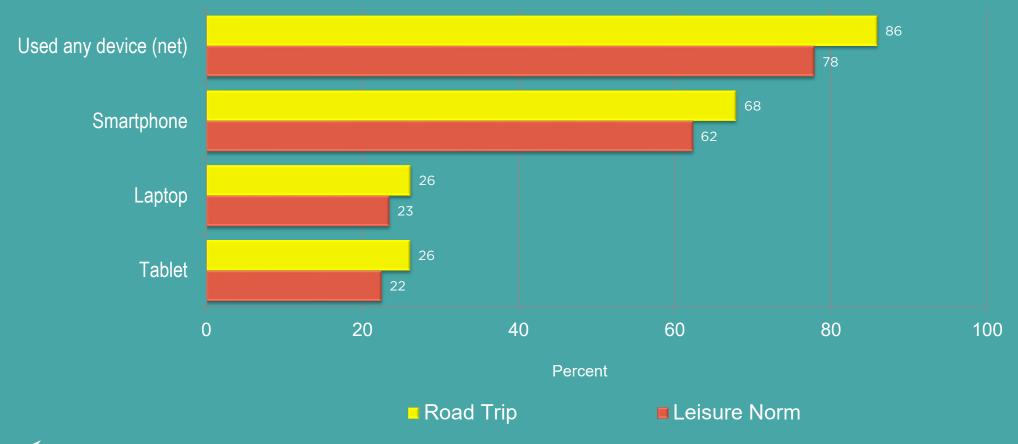
Devices Used for Trip Planning







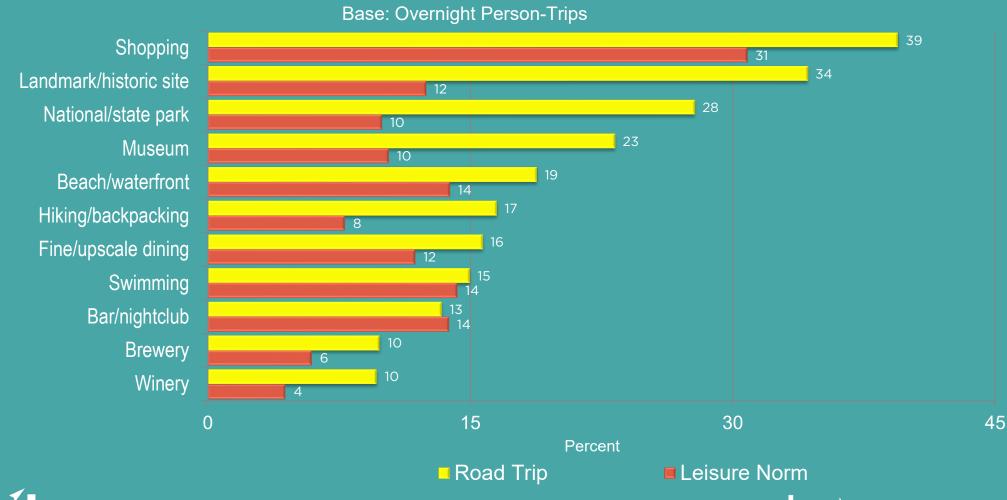
Mobile Devices Used During Trip







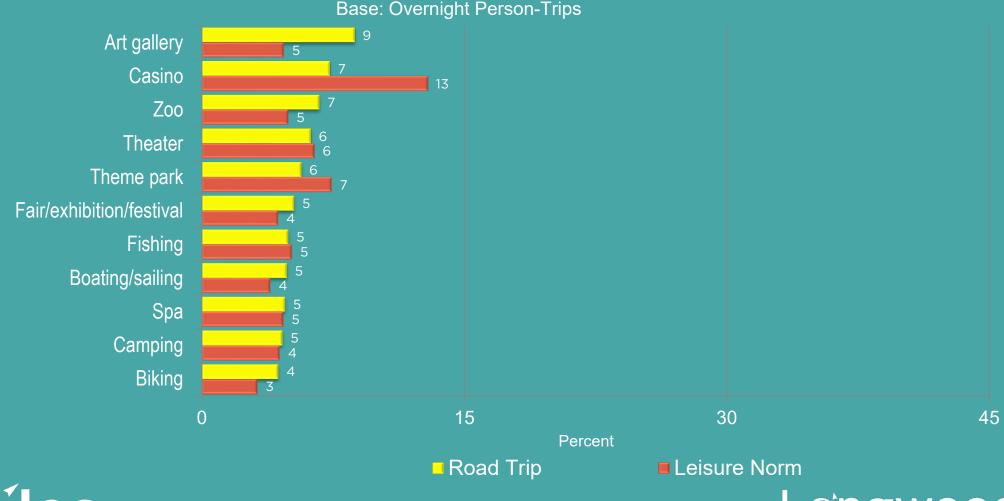
Activities and Experiences







Activities and Experiences (Cont'd)

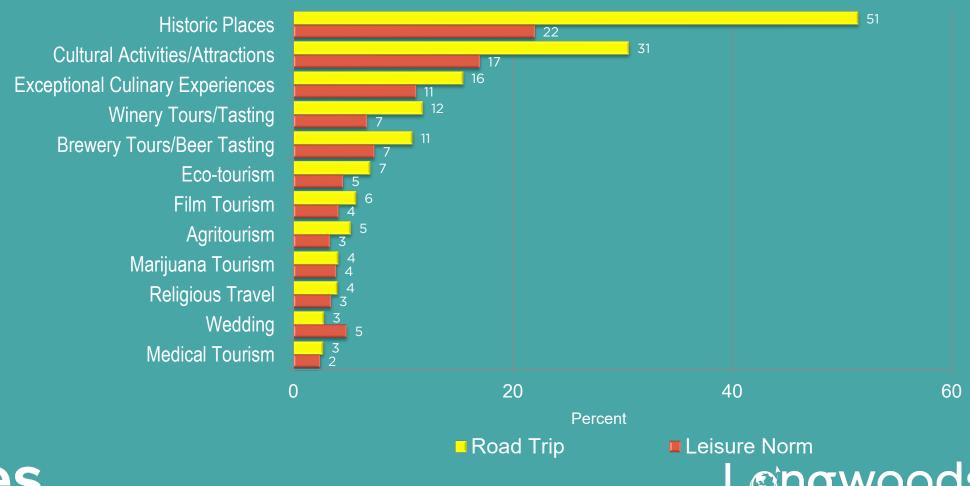






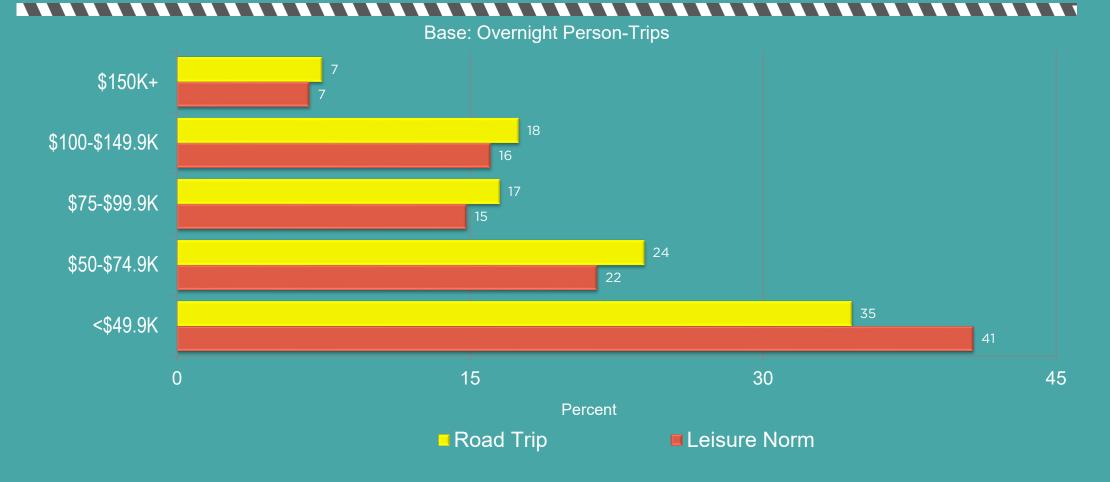
Activities of Special Interest

Base: Overnight Person-Trips





Household Income







Education

Base: Overnight Person-Trips

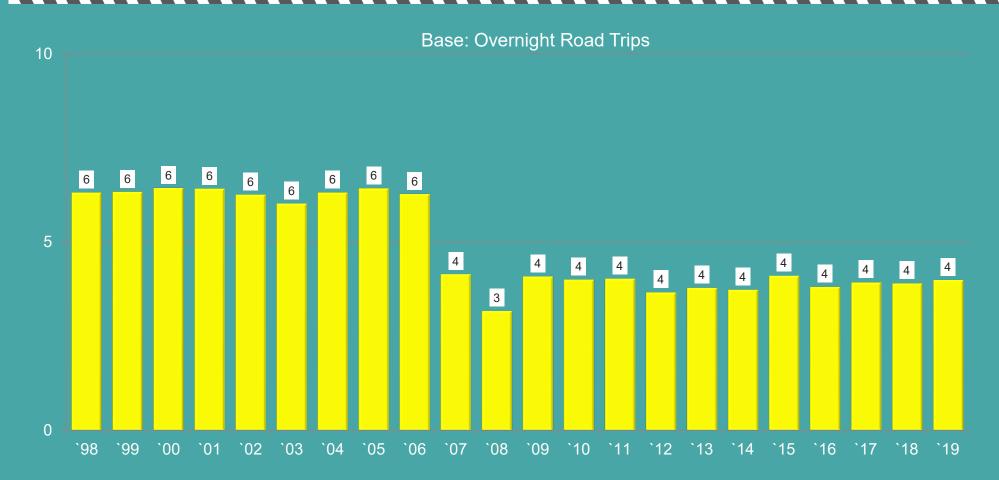






6. Road Trips are a Partnership Opportunity!

Number of Nights Away on Trip

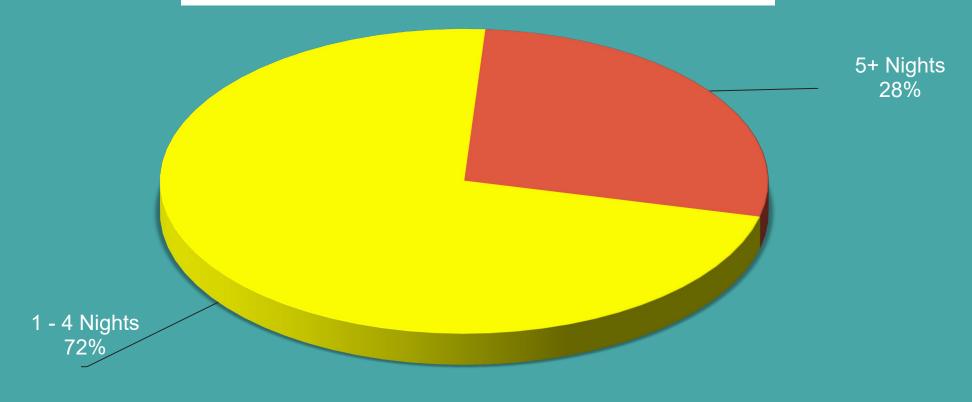






Size of Longer Road Trip Segment in 2019

Total Overnight Road Trips = 137 Million

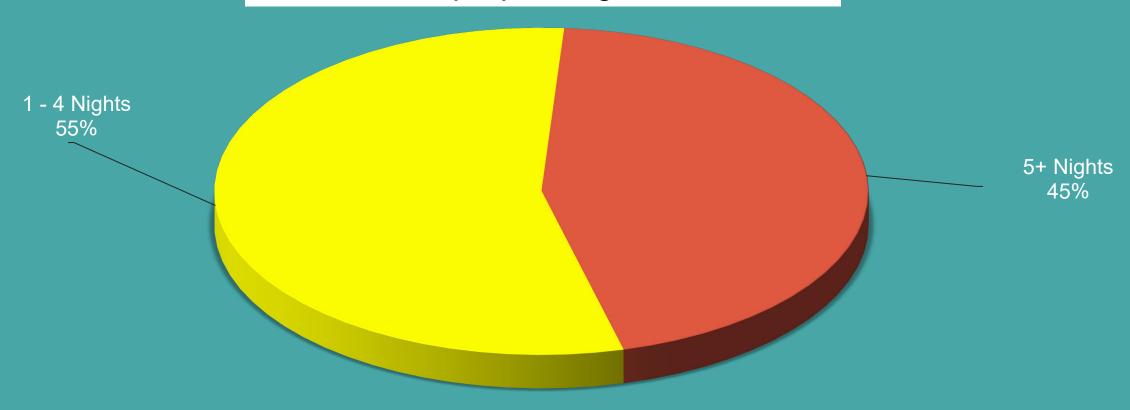






Total Expenditures of Longer Road Trip Segment in 2019

Total Road Trip Spending = \$51.3 Billion

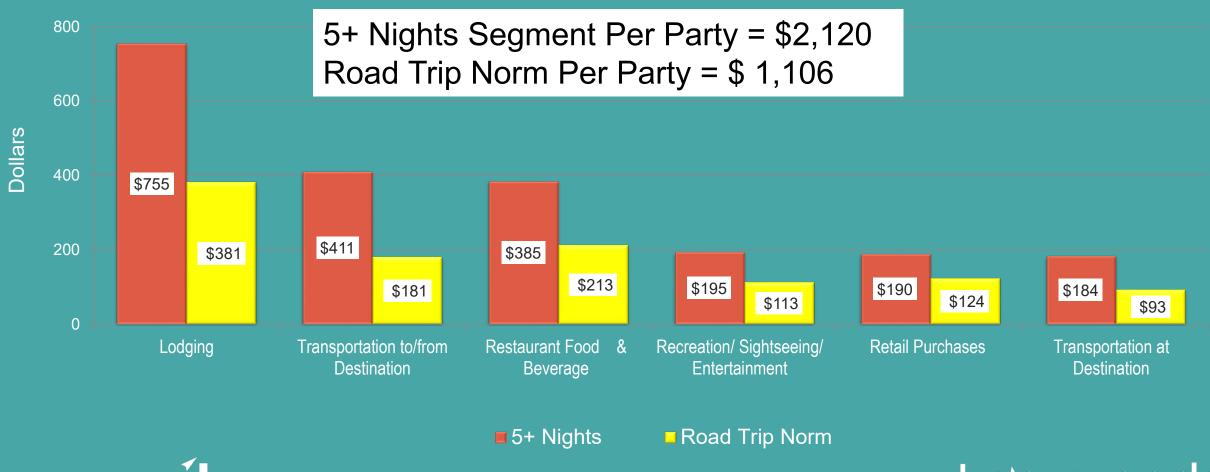






Average Per Party Expenditures — By Sector

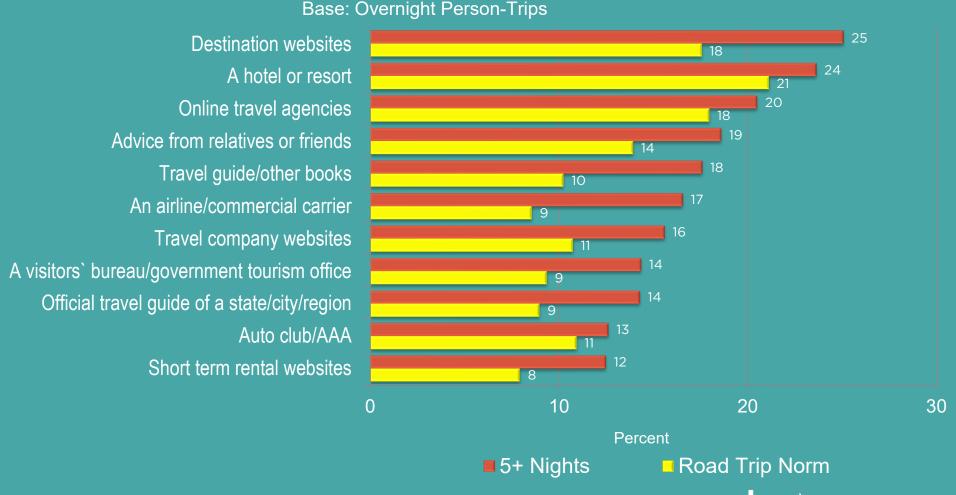








Trip Planning Information Sources

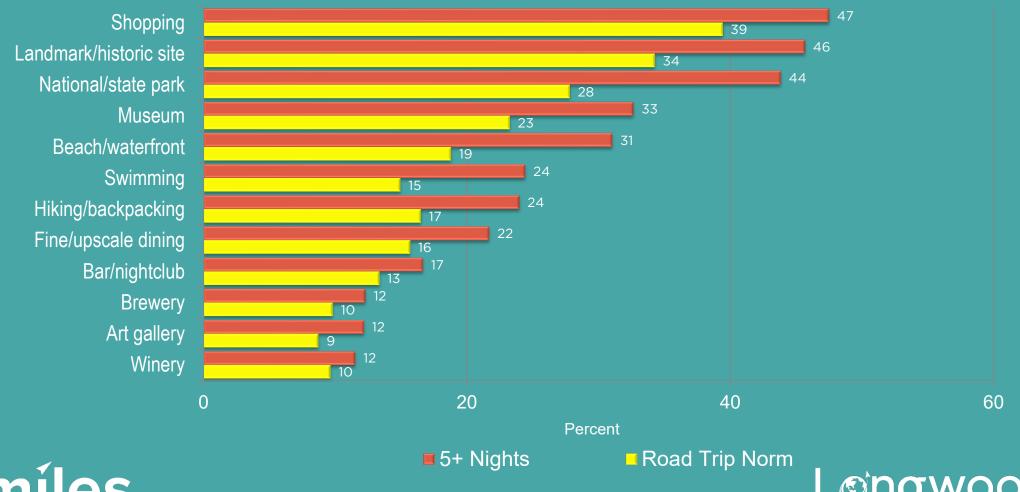






Activities and Experiences

Base: Overnight Person-Trips



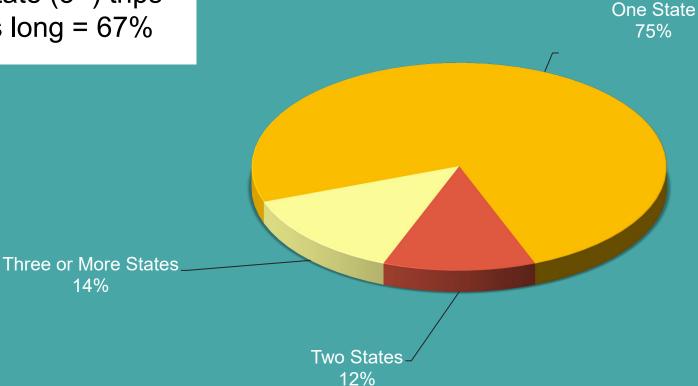




Number of States Visited on Trip – 2019 Longer Road Trips

Base: 5+ Nights Trips

Percent of multi-state (3+) trips that are 5+ nights long = 67%







In-State and Multi-State Partnerships!



FINAL Thoughts on ROAD TRIPS 2020 - 2021

Road Trips will be the dominant share of leisure travel into 2021 in many ways...

- VFR First Invite Them!
- VFR Second
- Leisure Third Sweet Spot of Opportunity!
- Groups
- Business Travel Too...





MAJOR U.S. TRAVELER CONCERNS FROM COVID-19

Addressing these concerns is critical to stimulating road travel:

86% are confused about travel restrictions and rules on their trip

Agreed with one or more of these statements as of August 2020:

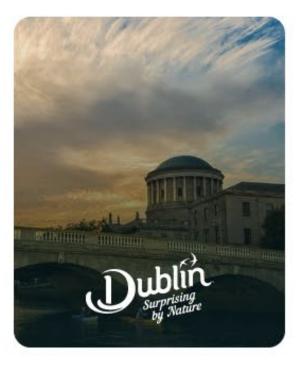
- Travel restrictions are unclear or vary between, or in, the destinations I'm interested in visiting
- Health & safety protocols are unclear or vary between, or in, the destinations I'm interested in visiting

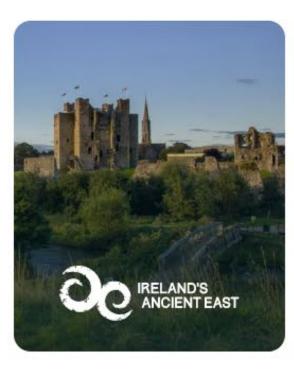


Explore Ireland's regions

Think you have seen it all? It's only the beginning of what this island has to offer.











Get out and enjoy a safe staycation in Ireland's Ancient East







Rialtas na hÉireann Government of Ireland



Rediscover Dublin: your guide to safe travel in the capital









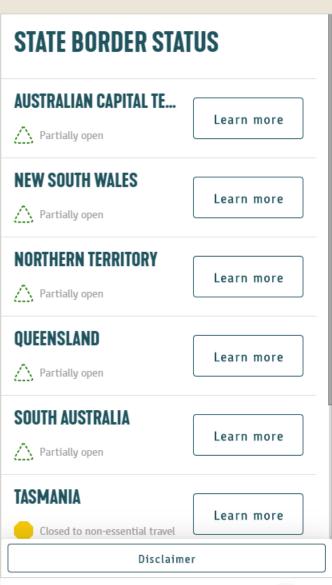
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Latest COVID safe travel information: click here

AUSTRALIA



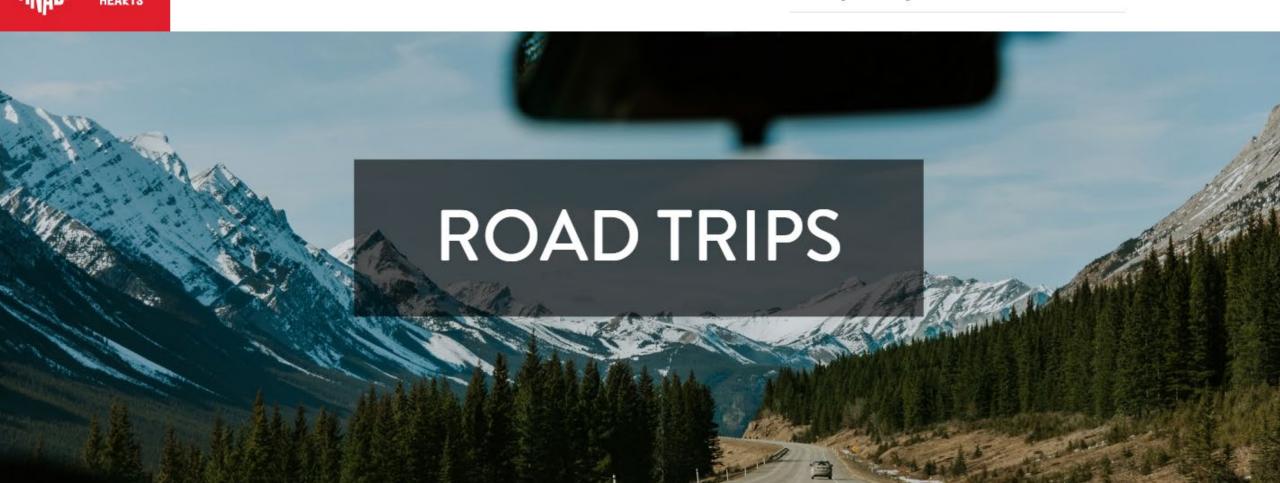
AUSTRALIA











DREAMING OF THE OPEN ROAD?

Whether you're after a short scenic drive or a multi-day adventure across the country, Canada's friendly communities and breathtaking landscapes stretching coast-to-coast-to-coast make for the perfect road

HELPING YOU PLAN

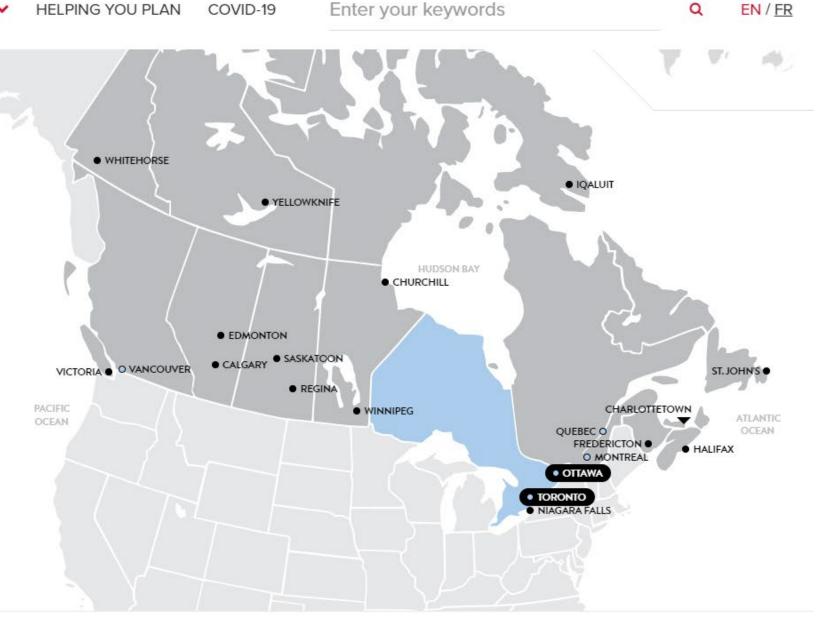


Hover over the provinces and territories to see current travel restrictions and traveller self-isolation requirements.

WHERE TO GO V

Information updated as of September 1, 2020.





WHAT CAN YOU DO?

WHEN IT'S TIME FOR YOU, WE'LL BE READY



INDUSTRY TOOLKIT

The Movement Starts September 8





Travel the
Byway: A Road
Trip for
Recovery





THE ROADS TO ANY GREAT VACATION LEAD HERE



WESTERN MARYLAND

Visit American National Battlefield, go rock climbing or while-water rafting, or go skiing. in the winter resolbs. Western Haryland's rich heritage and natural beauty make every trip on adventure.

CAPITAL REGION

Hike to the top of majestic Great Falls, enjoy. Potomec views and more at National Herbor or explore the Frederick Wine Trail. Maryland's Capital Region offers plenty of variety just: minutes from our nation's capital.

CENTRAL MARYLAND

Catch a ball game and thrill to the downtown nightife, or sever the delights of a fermore' market and seafood fresh from the key. Central Maryland is where big-city culture and small-town charm come together.

SOUTHERN MARYLAND

Explore the guidoors on the 13-mile Indian Head Rail Trail, tour Historic St. Mary's City. the original state capital; or visit a vintege. lighthouse slong the waterfront. Southern. Maryland offers gargeous views from its many waterfront ollages.

EASTERN SHORE

Sail the waters of the Chasapeake Bay embark on a fishing or bicycling expedition. spend on afternoon on the beach or explore our cuartal villages. The Eastern Shore is equal parts relaxation and excitement.

FOLLOW THESE SIGNS AND BE OPEN FOR YOUR OWN MARYLAND STORY



Maryland's Eve Civil. Was balls are part at a multi-state collection of driving and walking routes that link together both well-inner and letterlenews stop to full the

authentic story of the one. The PEEE app. (in the staps Store and Spegle Play) and companion way guides now traveling the trade easy and fun.

FOR CIVE WAR TRAILS INFORMATION VBD ristinacylendurgritic/belowmarylande-dull-war-tails.



breitings atomy six of the nimer's beet

dirling tours. These "America's Byearys". see part of a statewick collection all It driving four that least you to breethicking sceners, roll to had blice toutes, postding adventores, plantful thesping and recultivestering cultury dilights.

FOR MILEYLAND SCENC BYWAY MICHAUSON VIST stollerary band angriscomic showing



[MPLAN] From the Appalachian Mountains to the Chesopuelos Sep to the Atlantic Ocean; Marylanni's

discrepted beautiful public lands include to state parts with tidal. waterfront, eight store parks with recreational lakes and 29 state parks open to hurian.

FOR MORE STATE AND NATIONAL PARK INFORMATION, VISIT restruyund.org/ things to do parks nature



Trevel along the Harrist Tabeus Underground Stokowá Byway to discover the many of this amoning youten.

and the "Network to Prevalent" that she and others used to forever change thenation. Along the way, stop at any one of It interpreted pull-offs and then expay the ample opportunities to hike bills, packlin. shop and dine.

FOR MORE RECEMBRISH MRD TOWATCH THE HERIO, VISIT universalizated organization dryways free land abstract anderground/selroad



To Ser Spengisol Server Middeed Historic Tind commitment of the writing of the national

anthem and the heroic efforts of the menand women involved in the Changesole. Companies of the War of 1813, Explore the stee that led to the September 1914 battle that regired the poem that became our national arthers.

FOR THE REALISING PORCHASTIC TRAIL INFORMATION VIIIT violation/shed arg/scens-byname." stanspargerd banner



White set the road stop. is a Maryland Welcome Center to discover lots more things to see and do during your visit.

There's no better way to learn about all. of the great things Maryland has in offer then in speak with a Maryland traval

FOR WELCOME CENTER INFORMATION. WSIT visitneylandoug/info/inevlandwebone-centers



VisitMaryland.org

OR CALL 866-MD-WELCOME

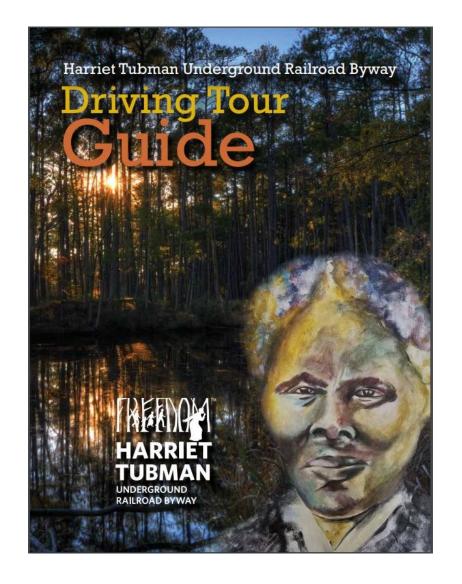
Check out whitmeryland.org or cell 866-MO-WELCOME to plan your getomey:

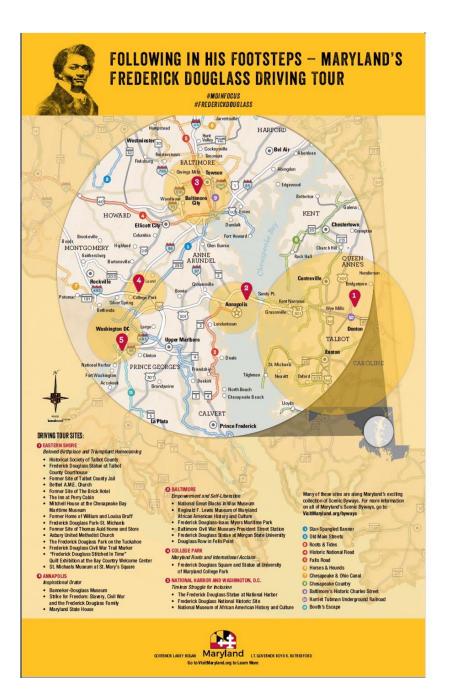


Harriet Tubman Underground Railroad Byway

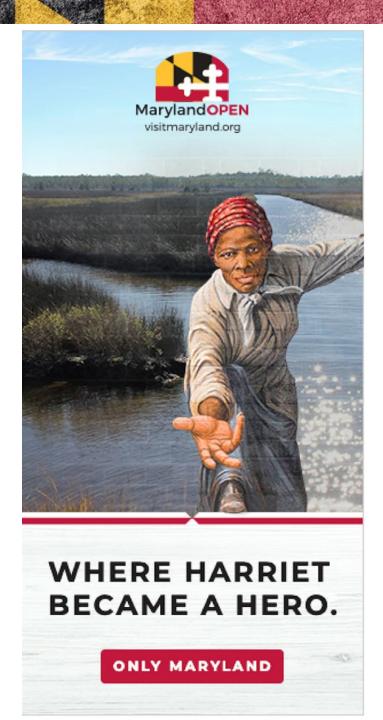














Open for Road Trips

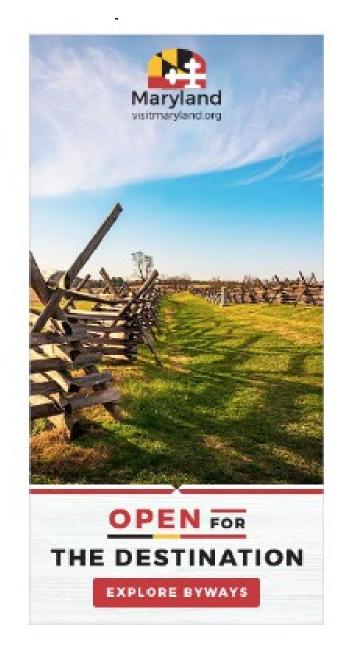
Hit our Scenic Byways for a Real Maryland Adventure

In Maryland, the journey is often just as fun as the destination.

That's why we're giving you an inside look at 18 Scenic Byways around the state.

















THANK YOU













Kentucky Department of Tourism













We're already a drive destination

- 88% of overnight visitors drove to Kentucky in 2019
- Kentucky over-indexes compared to US Norm on VFR, Touring & Outdoor Activities
- Existing drive itineraries such as distillery tours, horse farms, historical sites, national parks
- Kentucky is within a 4-5 hour drive of key metros:
 - Cincinnati, Columbus, Cleveland, Nashville, Knoxville, Memphis,
 Charleston/Huntington, Indianapolis, St. Louis, Atlanta, Chicago, Charlotte,
 Birmingham
 - I-65 and I-75 are major arteries bisecting Kentucky

Source: Travel USA 2019 Kentucky Visitor Profile, Longwoods International



Marketing Campaign Objectives

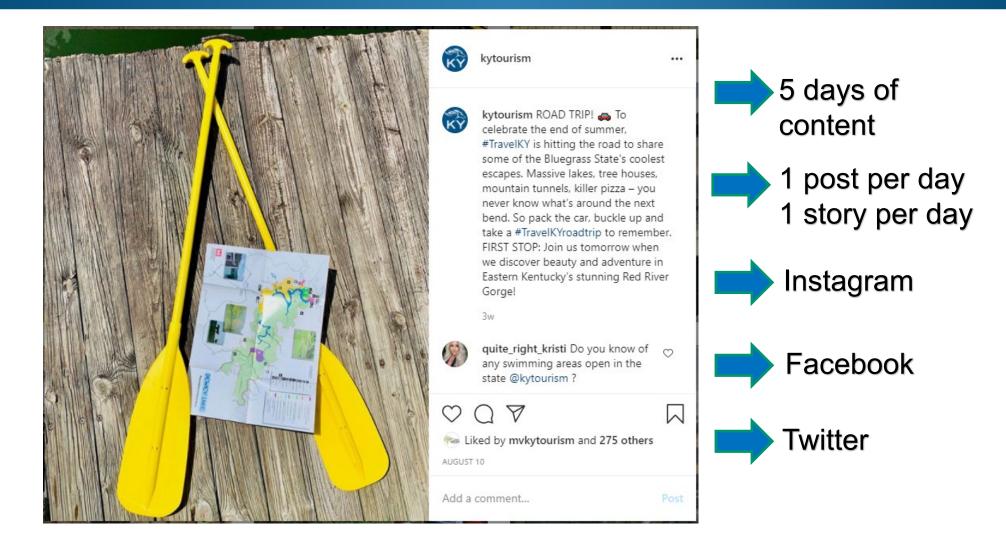
- Increase in-state travel while developing stronger and deeper engagement with visitors
- Inspire consumers to consider a Kentucky vacation through content that highlights all there is to see and do across the Commonwealth
- Subtly emphasize traveler safety and health
- Remind Kentuckians they don't have to travel far to be transported a world away. The Bluegrass State is full of surprises...even to those who call it home.



Marketing Activities

- One per month from August October
- Launched week of 8/10
- Second is happening now
- Three primary platforms Facebook, Twitter & Instagram

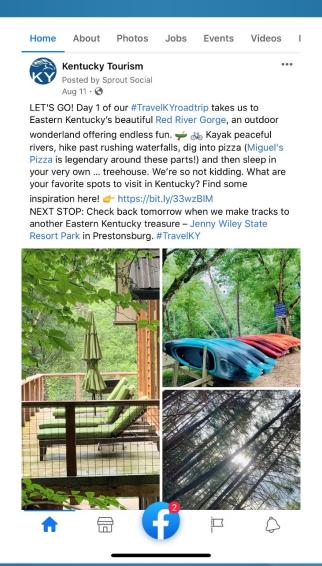




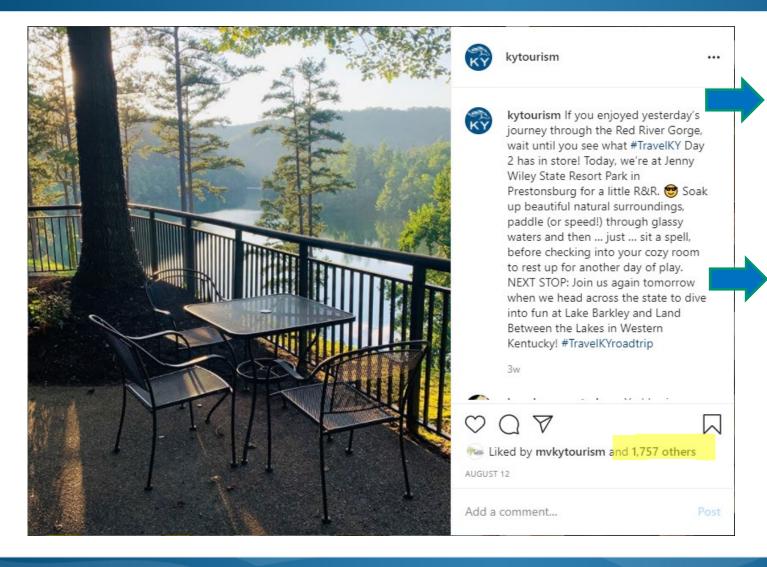








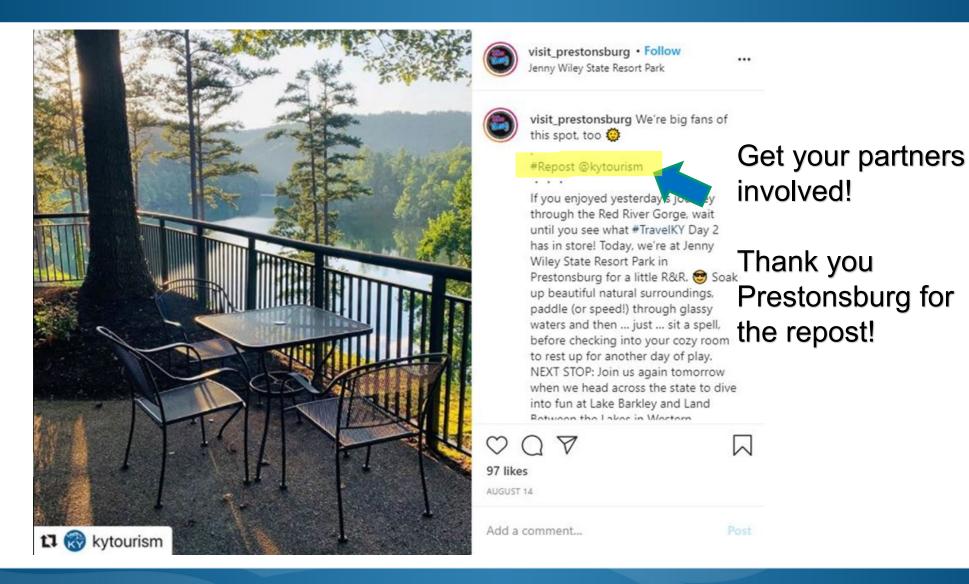




Day Two – Jenny Wiley State Resort Park

Instagram









For Day 3 of our **#TravelKYroadtrip**, we're heading west to Lake Barkley and @LandBtwnLakes, where it's ALL about having fun around the water! What's your favorite Kentucky lake? Find one here! bit.ly/2Po7BbX #TravelKY



10:08 AM · 8/13/20 · Sprout Social

Twitter Day Three Land Between

Land Between the Lakes, Lake Barkley

Twitter Last Day Kentucky Dam Village State Resort Park



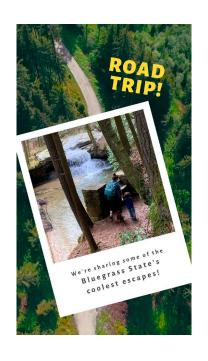
We're ending our weeklong #TravelKYroadtrip in Grand Rivers, where you can spend a day on the water or play around on solid ground!

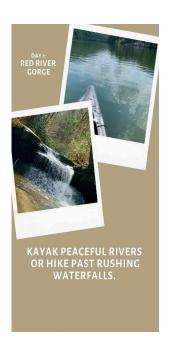
▲ Explore gorgeous @KentuckyDam, admire the sailboats at Lighthouse Landing or enjoy old-time shopping (and an epic meal!) at @pattis1880.



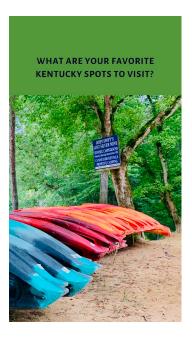
11:09 AM · 8/14/20 · Sprout Social













Instagram Stories = added value for your partners, locations and attractions



Join the Kentucky Department of Tourism for our next #TravelKYRoadtrip this week!



@KentuckyTourism



@kytourism



@travelkentucky

Featured this week:

- Mammoth Cave National Park
- Bernheim Arboretum and Research Forest
- Jim Beam American Stillhouse
- Shaker Village of Pleasant Hill
- Danville, KY



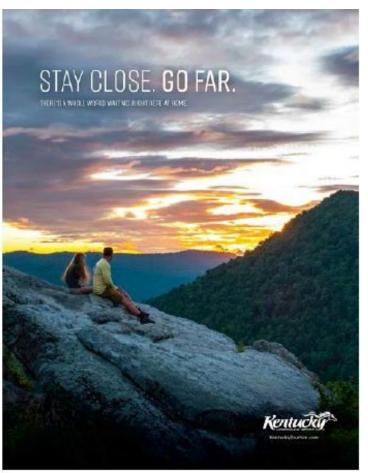
Marketing Activities

- Stay Close. Go Far Marketing Advertising campaign
 - Running 8/31 10/15
 - Digital, TV, Radio, Print
 - Only running in-state currently
 - Flexibility is key



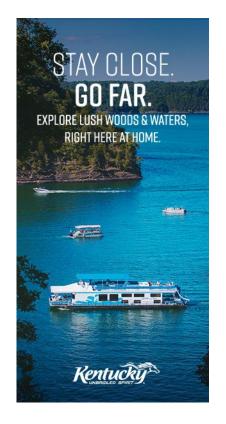
Print



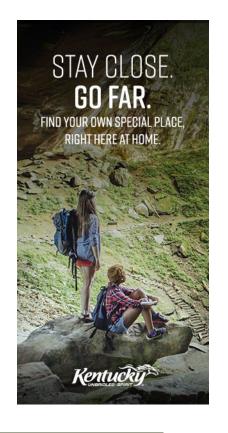




Digital









STAY CLOSE. **GO FAR.**IT'S TIME TO HIT THE ROAD, RIGHT HERE AT HOME.

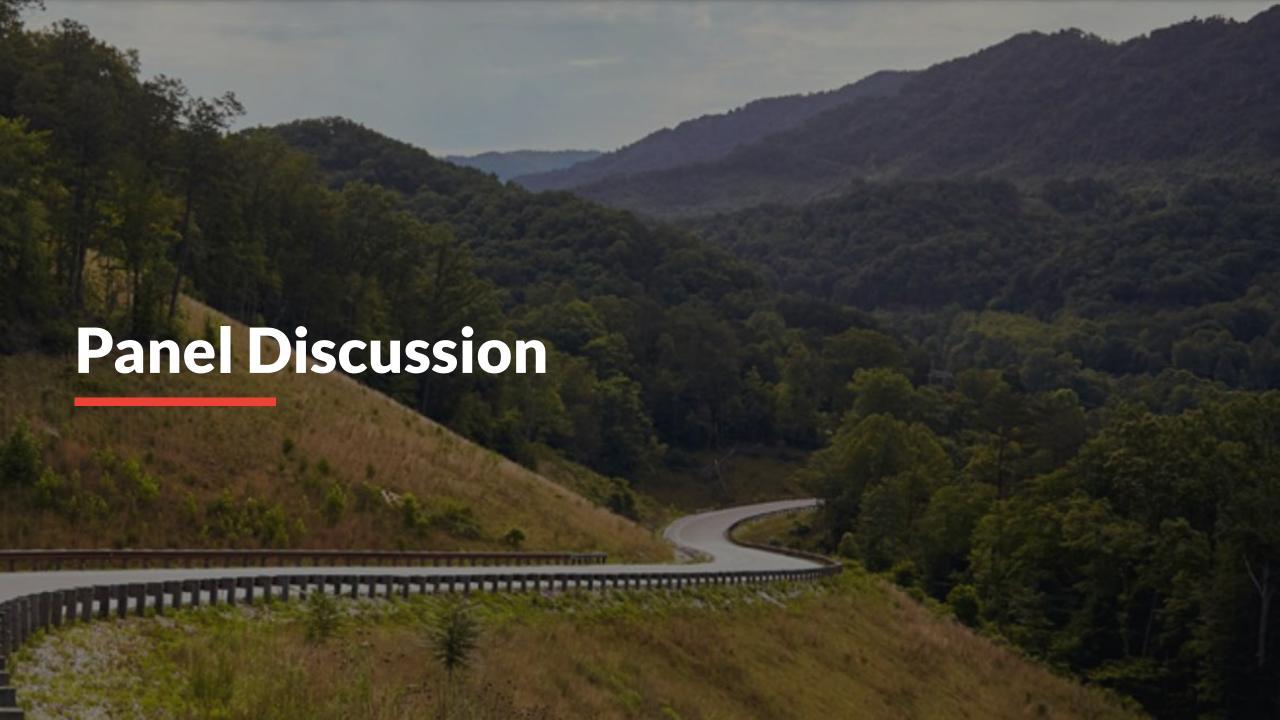




Television/OTT

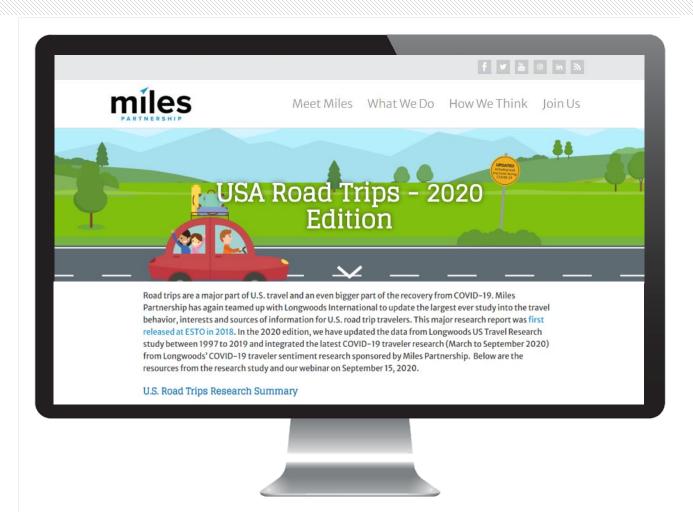






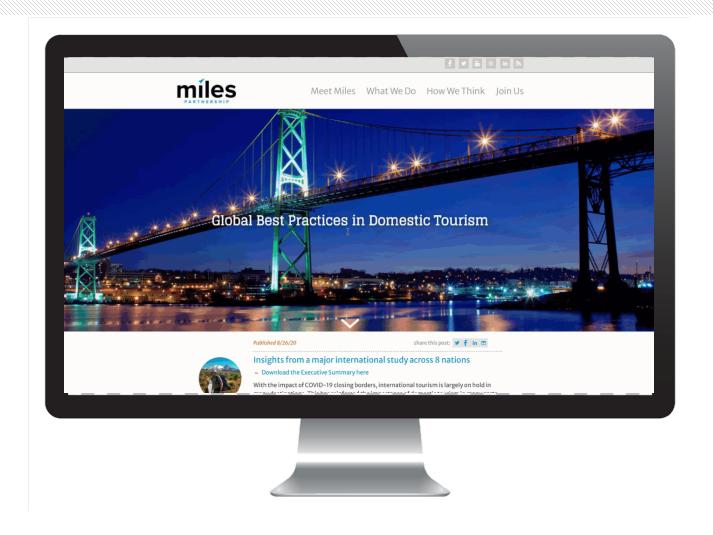


ROAD TRIPS RESEARCH AND ADDITIONAL RESOURCES



www.milespartnership.com/usa-road-trips

BLOG: GLOBAL BEST PRACTICES IN DOMESTIC TOURISM



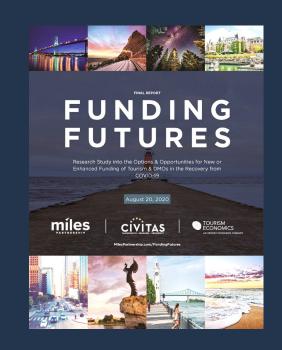
www.milespartnership.com/blog/



FUNDING FUTURES

The Impact & Future of Tourism & DMO Funding in Response to COVID-19

Final Report available at www.milespartnership.com/FundingFutures













UPCOMING FUNDING FUTURES WEBINARS

Funding Futures: Canadian Edition Thursday, September 17, 2pm ET

Funding Futures: Building Reserves & Short-term Rental Revenue
Tuesday, September 22, 3pm ET

Register at www.milespartnership.com/FundingFutures









