

U.S. ROAD TRIPS 2023

THE LATEST TRENDS & OUTLOOK FOR ELECTRIC VEHICLE TRAVEL

August 9, 2023

With You



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Longwoods International*



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Colorado Tourism Office*

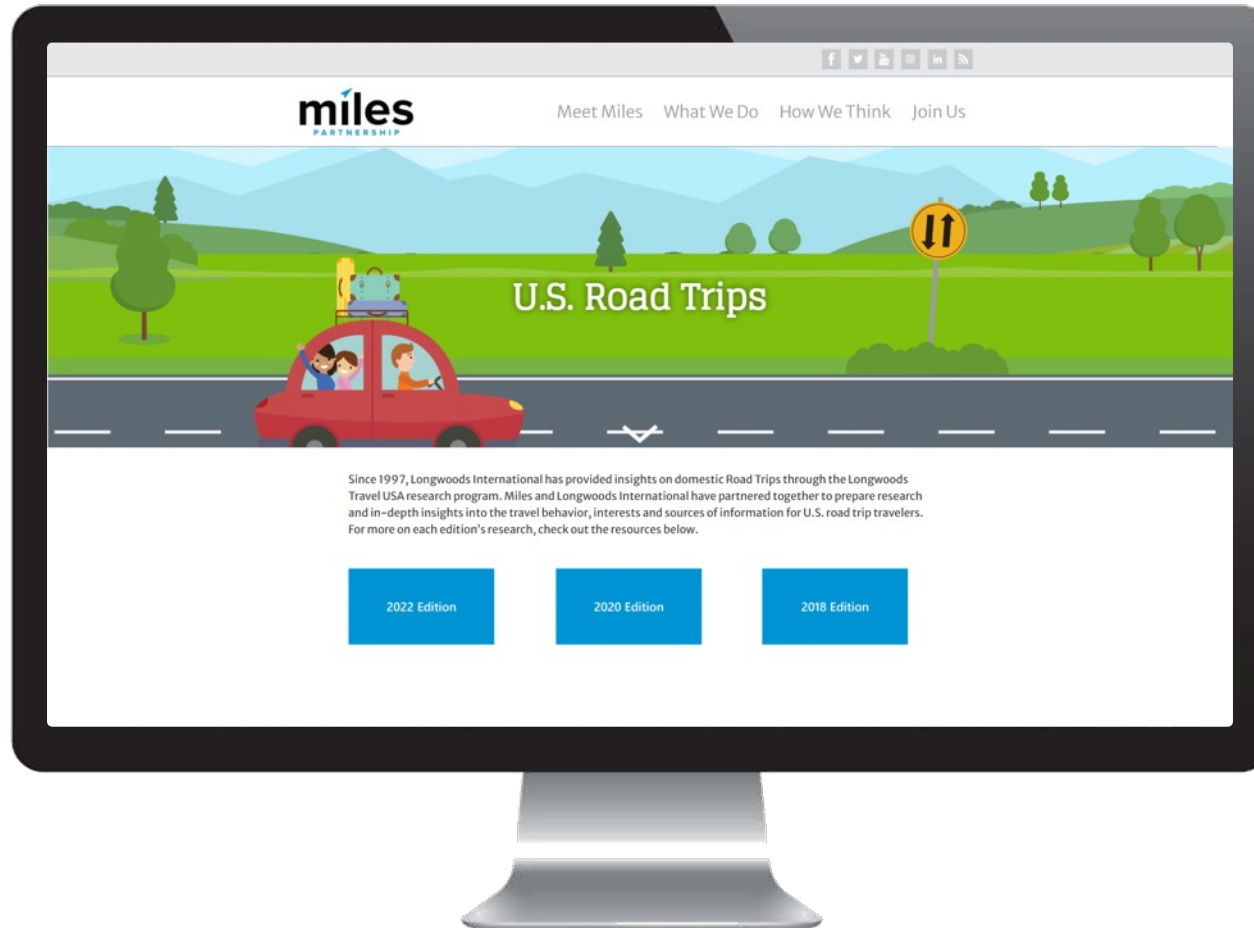


Lena Allen
*Director, Outdoor Rec. & Sust.
Arizona Tourism Office*

Agenda

1. U.S. Road Trips Research
2. Electric Vehicle (EV) Travel Research
3. EV Initiatives
 - Colorado Tourism Office
 - Arizona Office of Tourism
4. Additional Resources
5. Q&A

RESEARCH AND ADDITIONAL RESOURCES



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Are We There Yet? Road Trips Reinvented!

Fresh research & insights on marketing to
U.S. road trip travelers



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Longwoods International



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

Methodology (short version):

Travel USA®

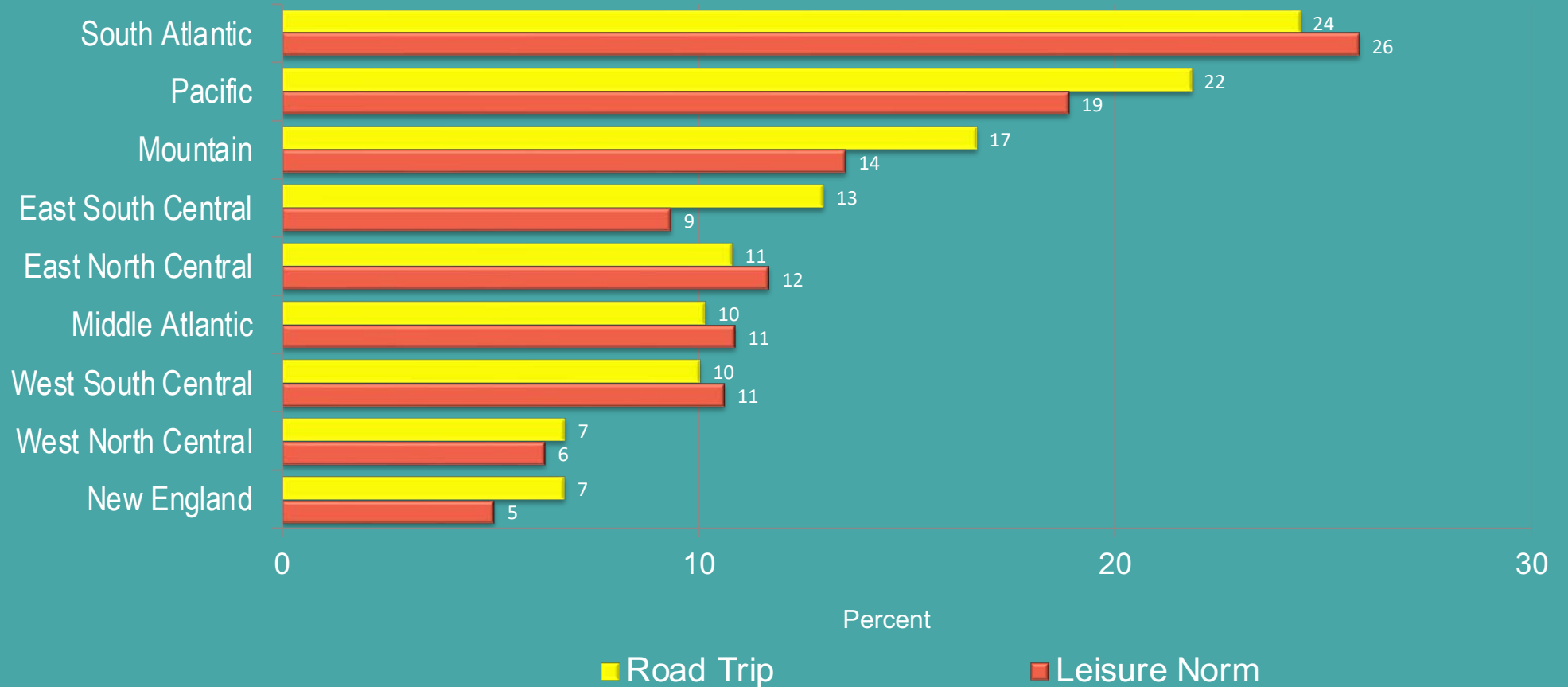
- Largest ongoing study of American travelers
- Quarterly random samples of U.S. adult population
- Consumer online panel
- Profiles of representative sample of 250,000+ overnight and day trips each year
- Overview survey, then a custom follow-up



Road Trip vs. Leisure

Regional Destination of Trip

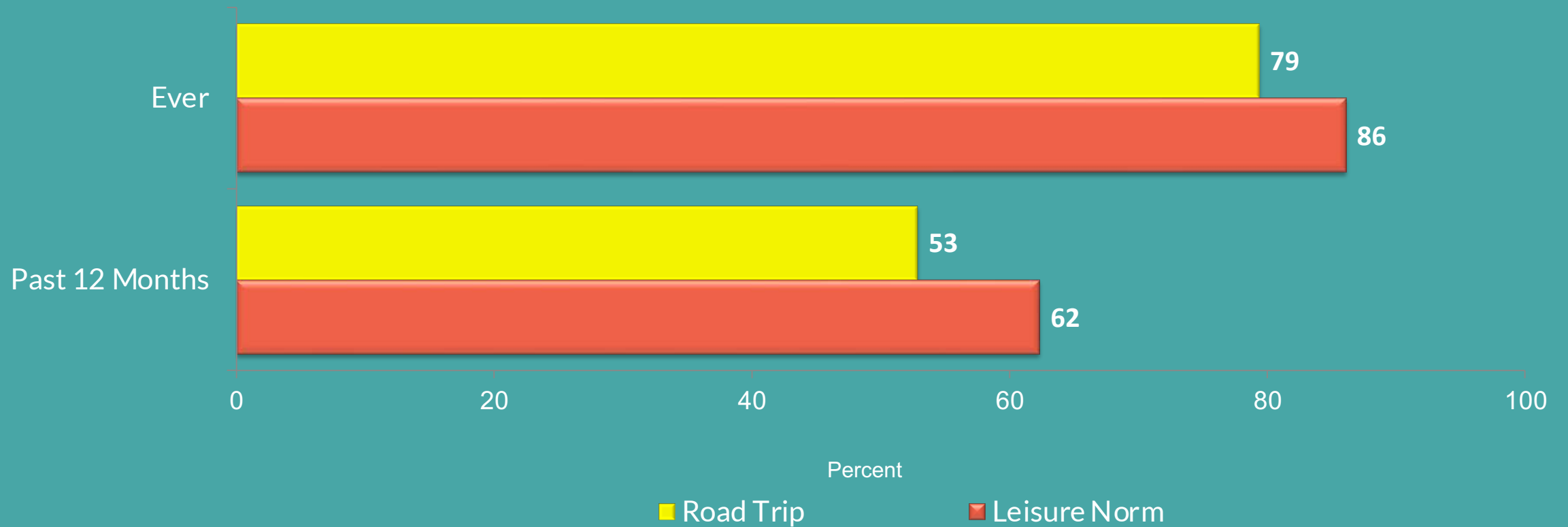
Base: Overnight Person-Trips



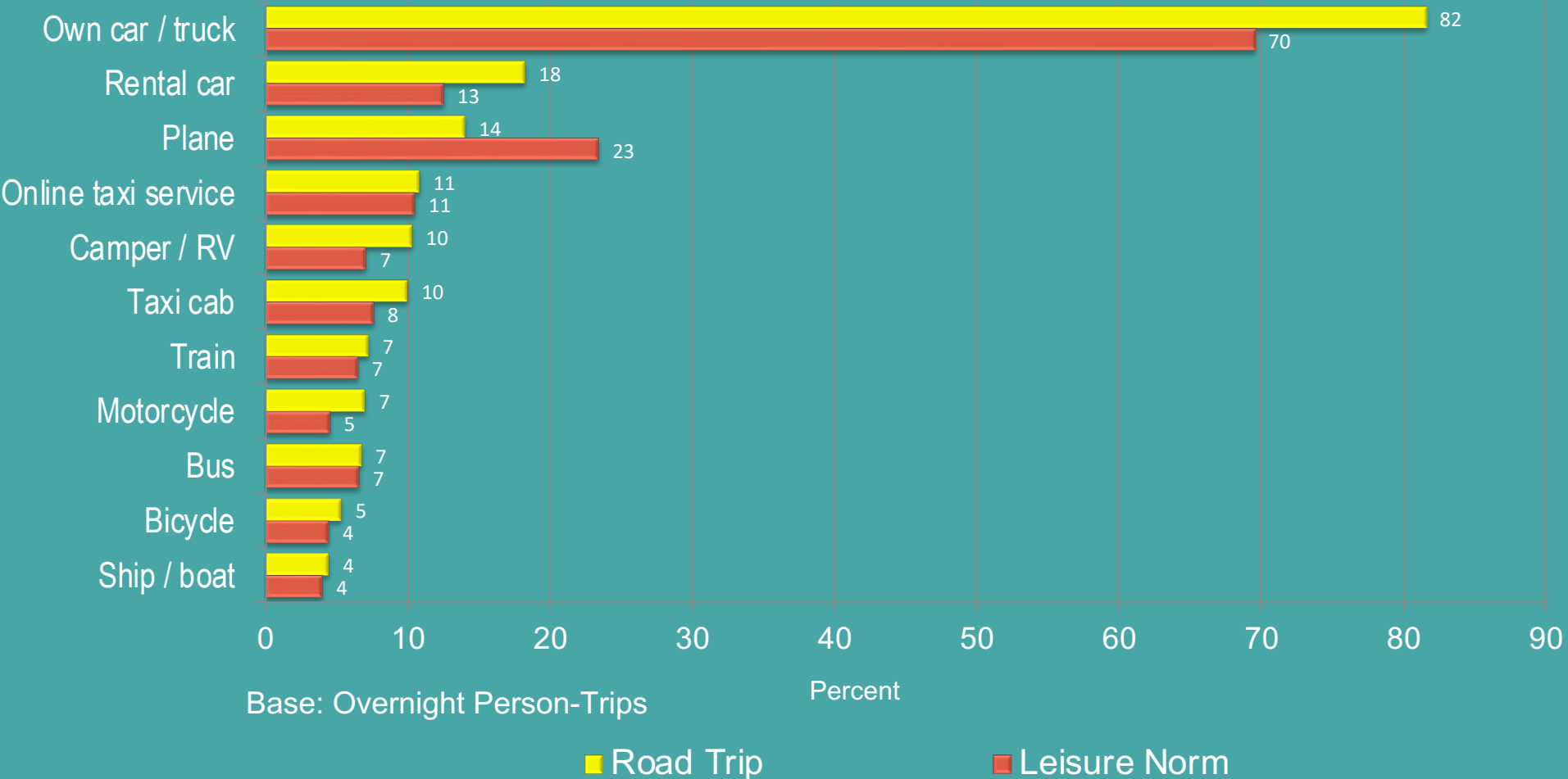
Past Visitation to Destination



Base: Overnight Person-Trips

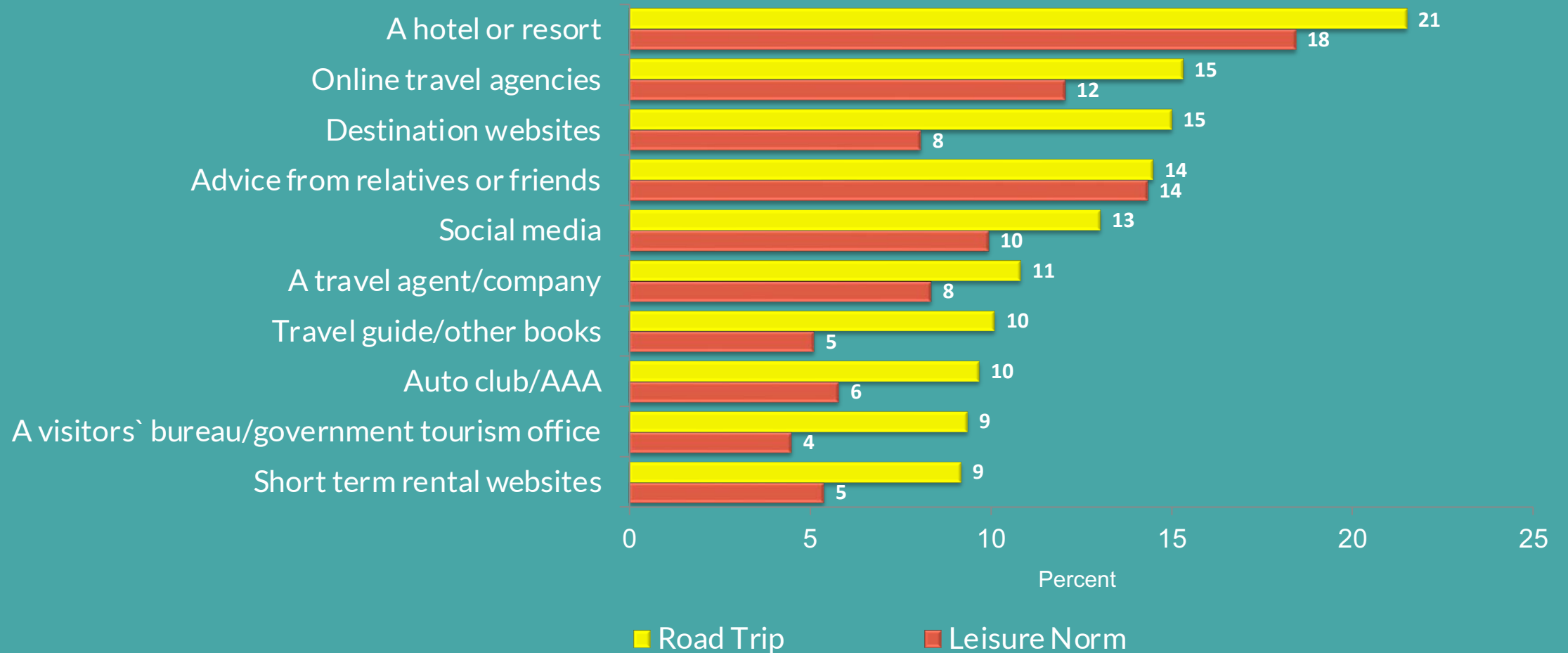


Transportation Used To Get To Destination



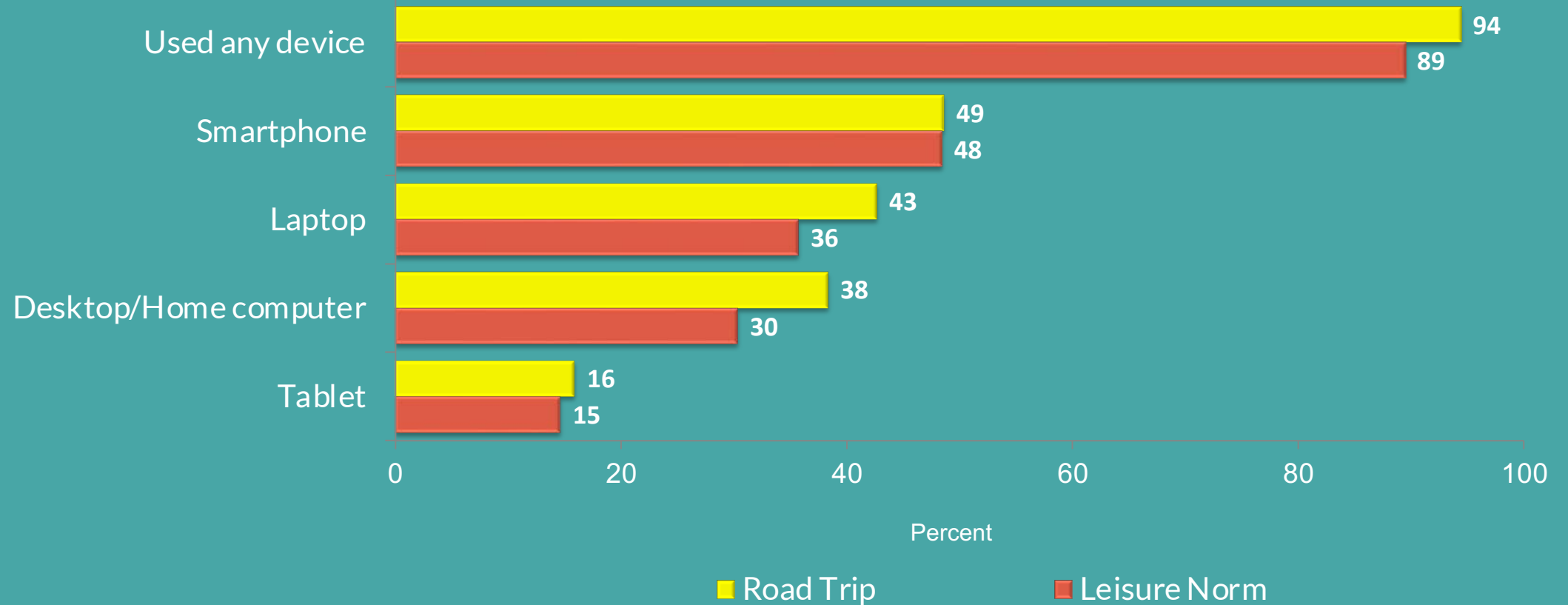
Trip Planning Information Sources

Base: Overnight Person-Trips



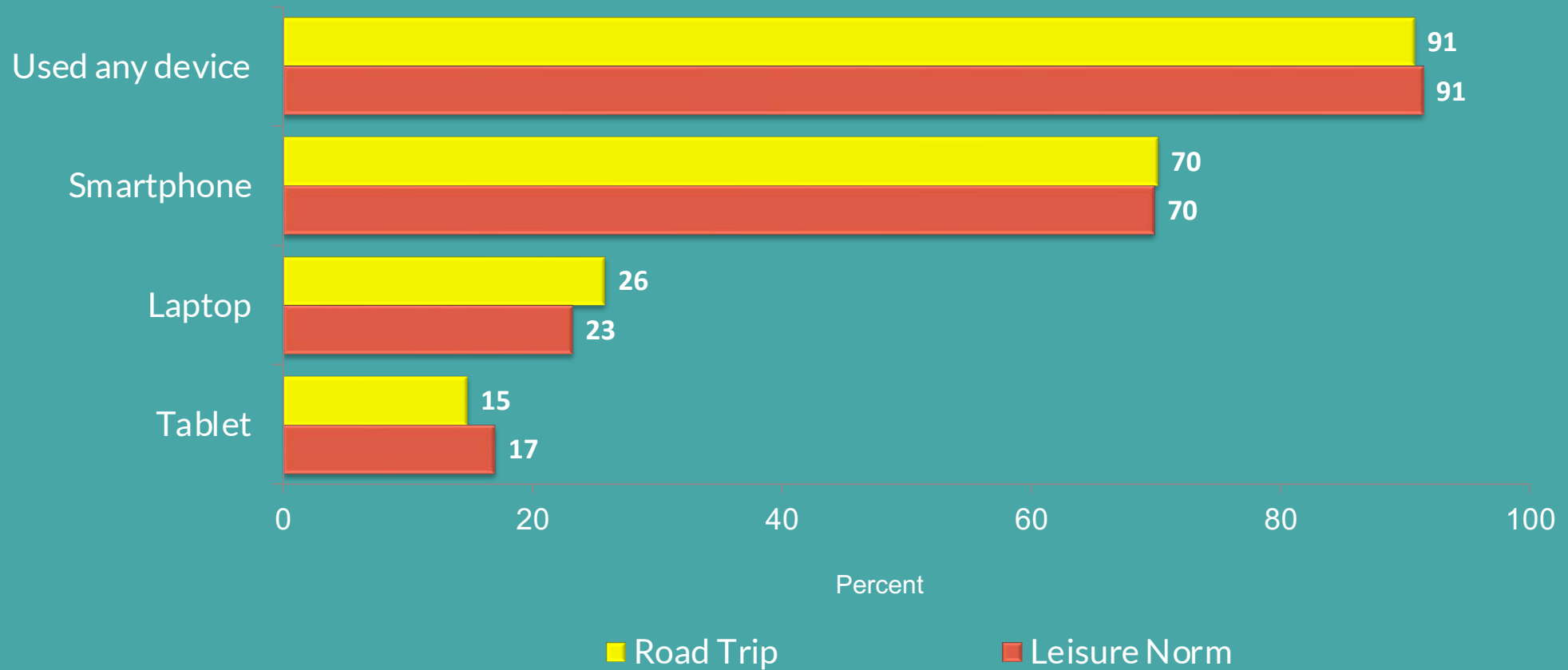
Devices Used for Trip Planning

Base: Overnight Person-Trips



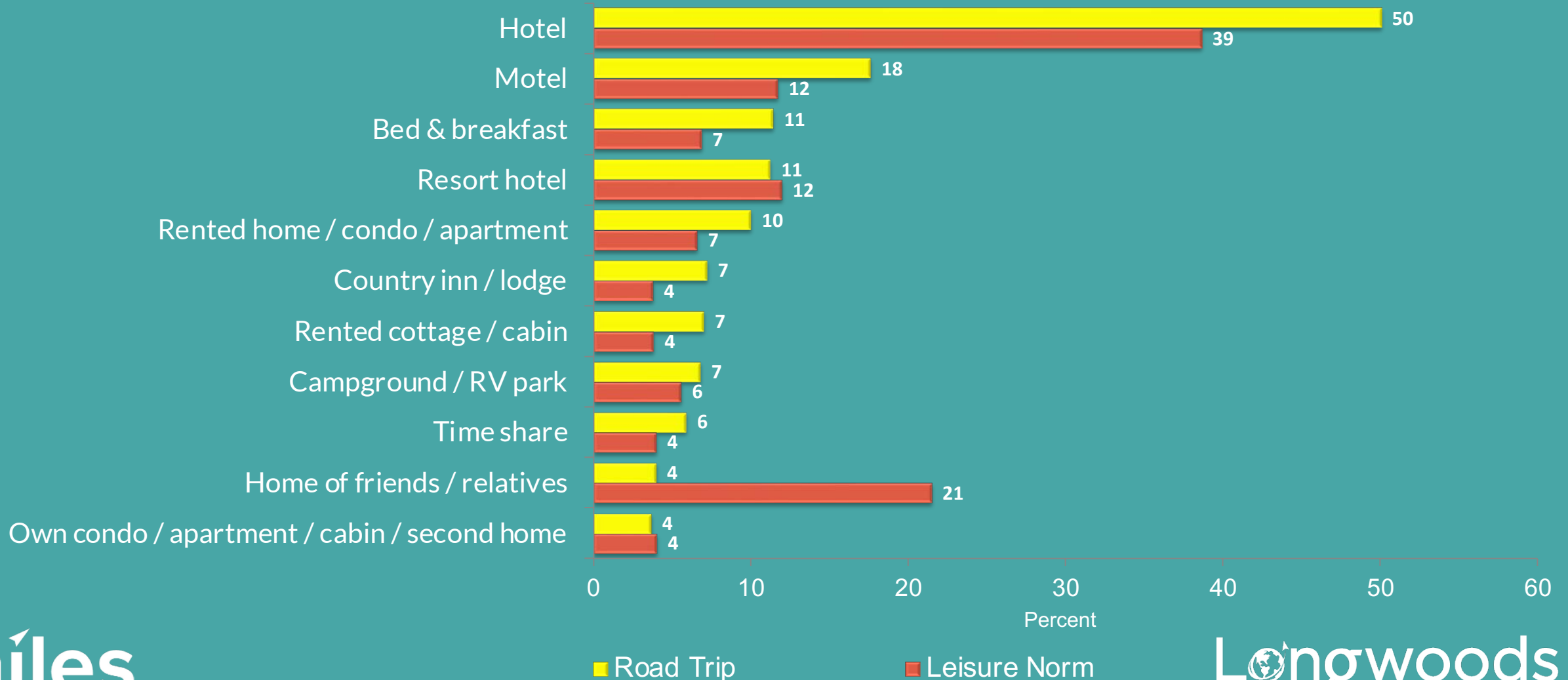
Mobile Devices Used During Trip

Base: Overnight Person-Trips



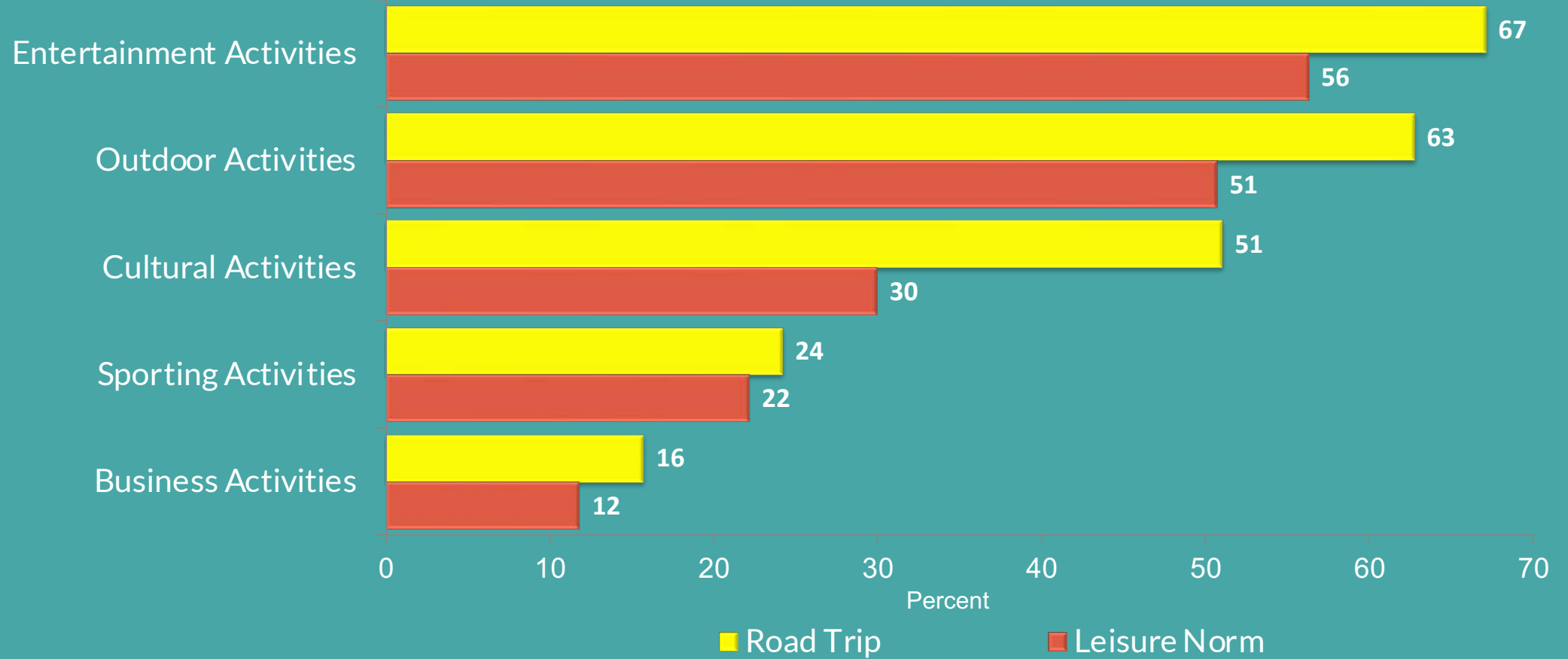
Accommodations

Base: Overnight Person-Trips



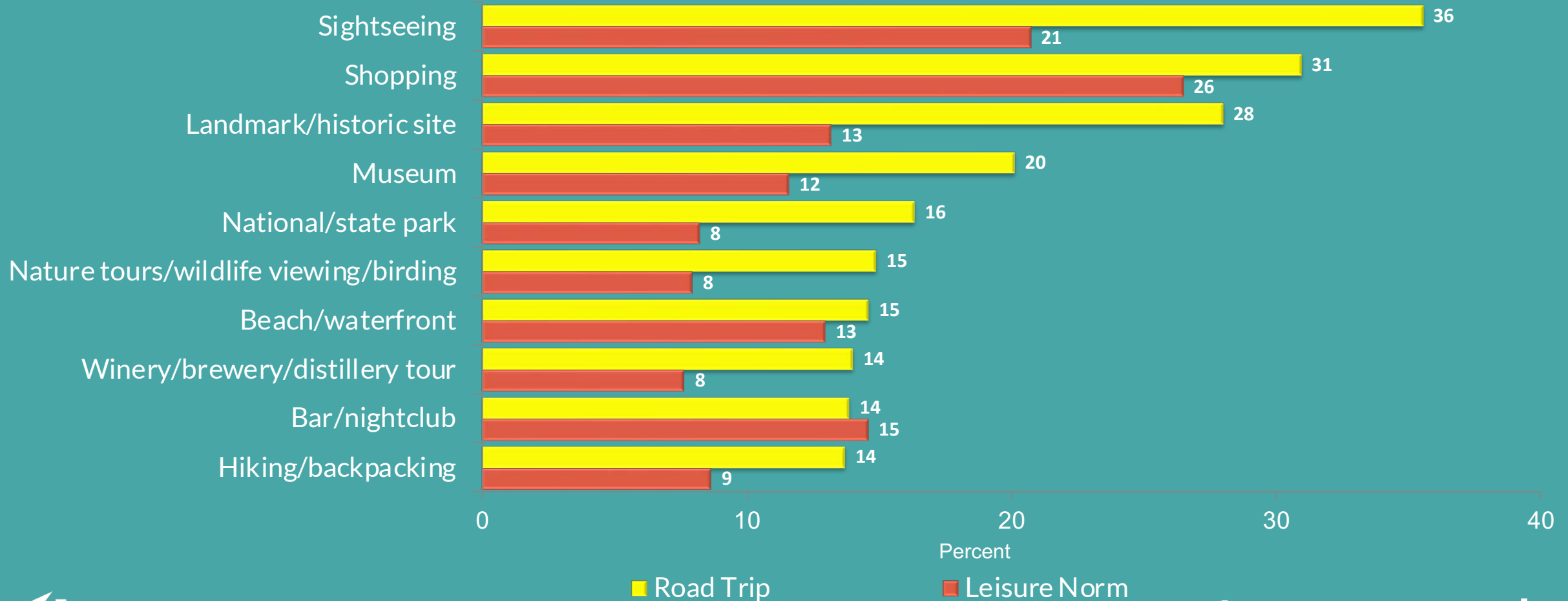
Activity Groupings

Base: Overnight Person-Trips



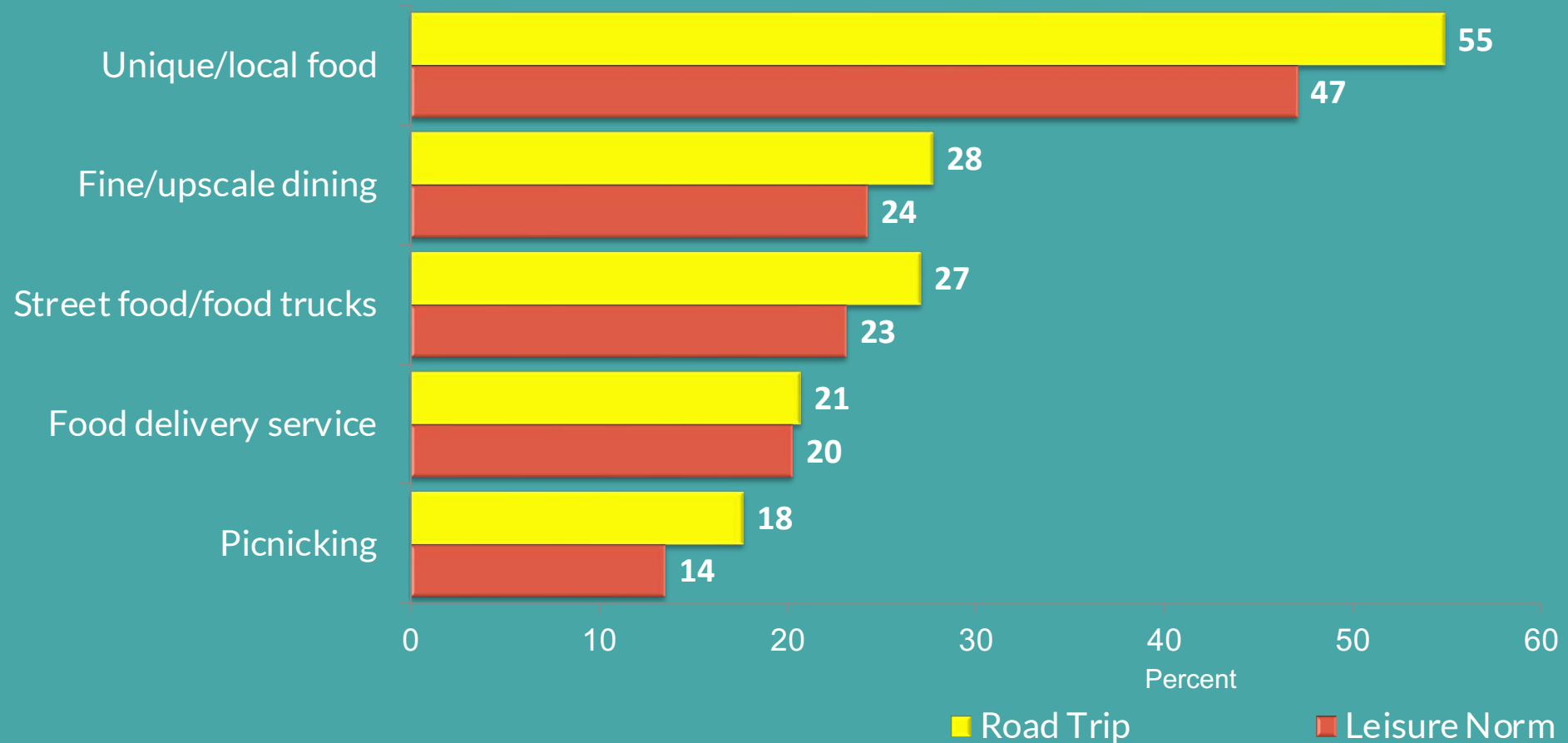
Activities and Experiences

Base: Overnight Person-Trips



Dining Activities

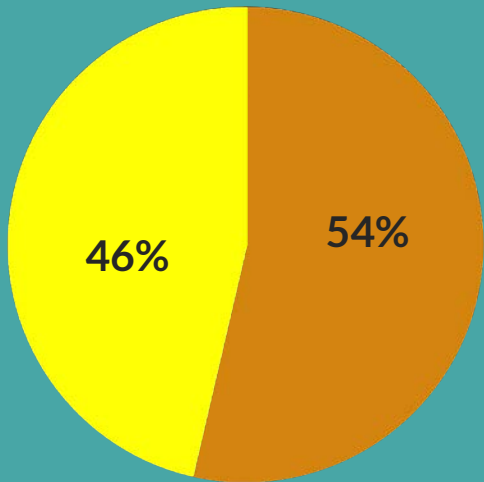
Base: Overnight Person-Trips



Gender and Age

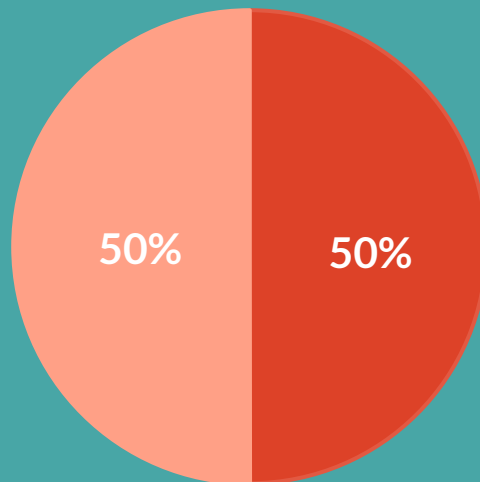
Base: Overnight Person-Trips

Road Trip

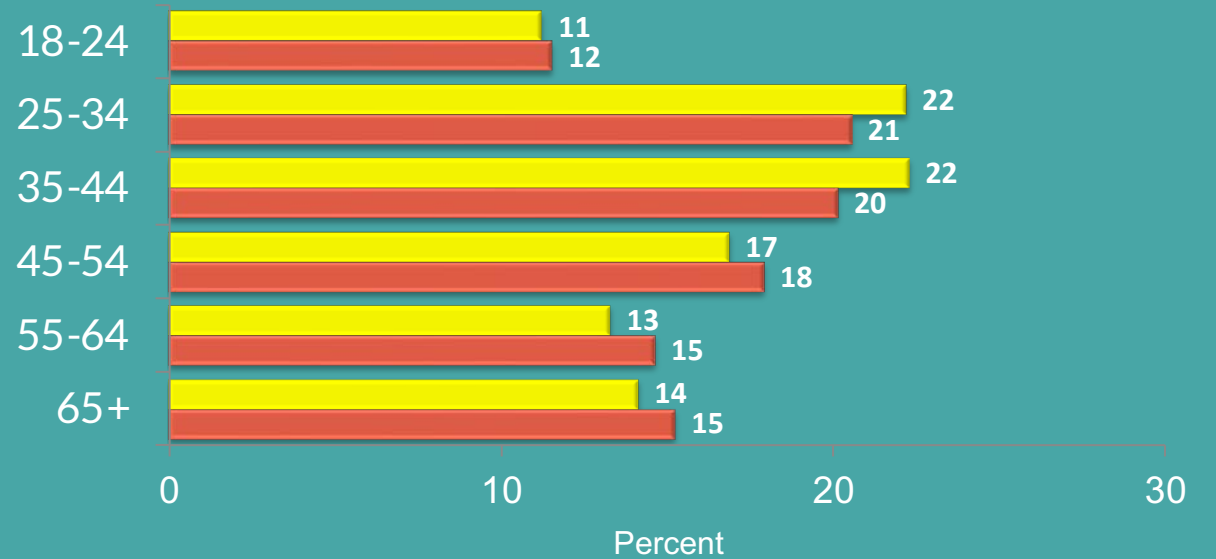


Male Female

Leisure Norm



Male Female



Road Trip

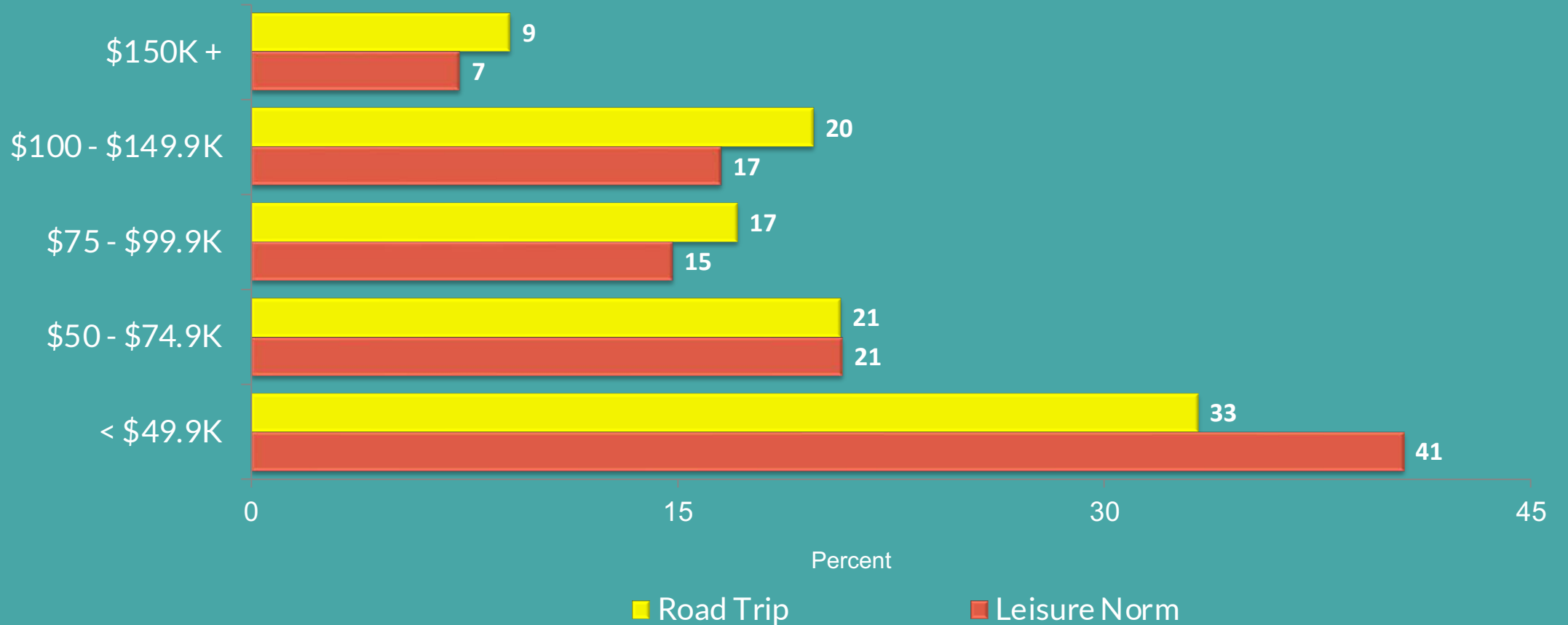
Leisure Norm

Average Age
44.1

Average Age
44.9

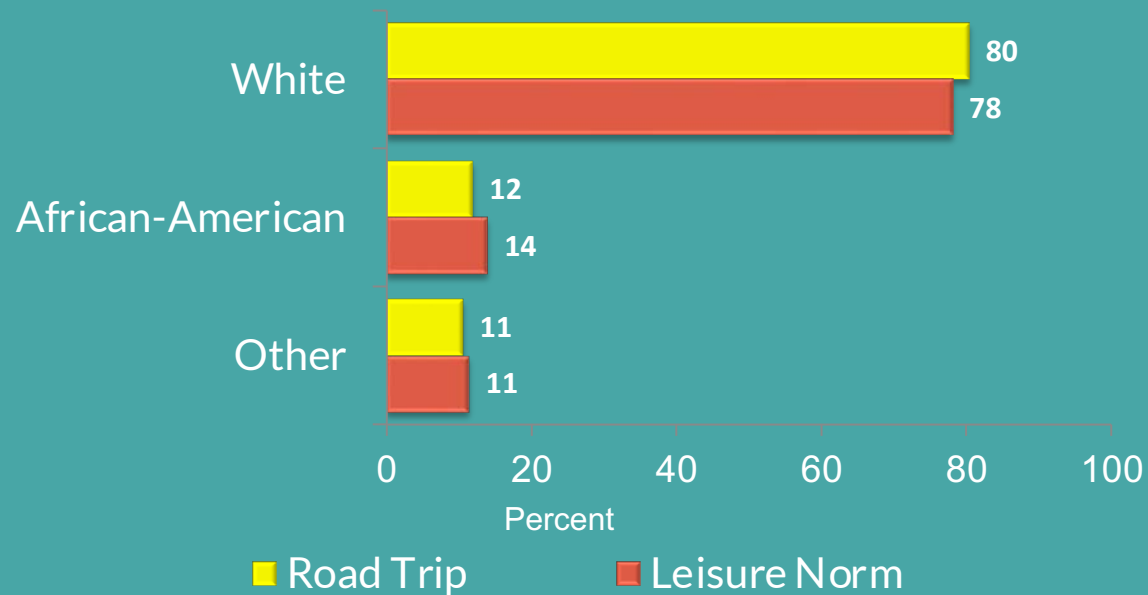
Household Income

Base: Overnight Person-Trips



Race/Ethnicity

Base: Overnight Person-Trips



Road Trip



Hispanic/Latino

Leisure Norm

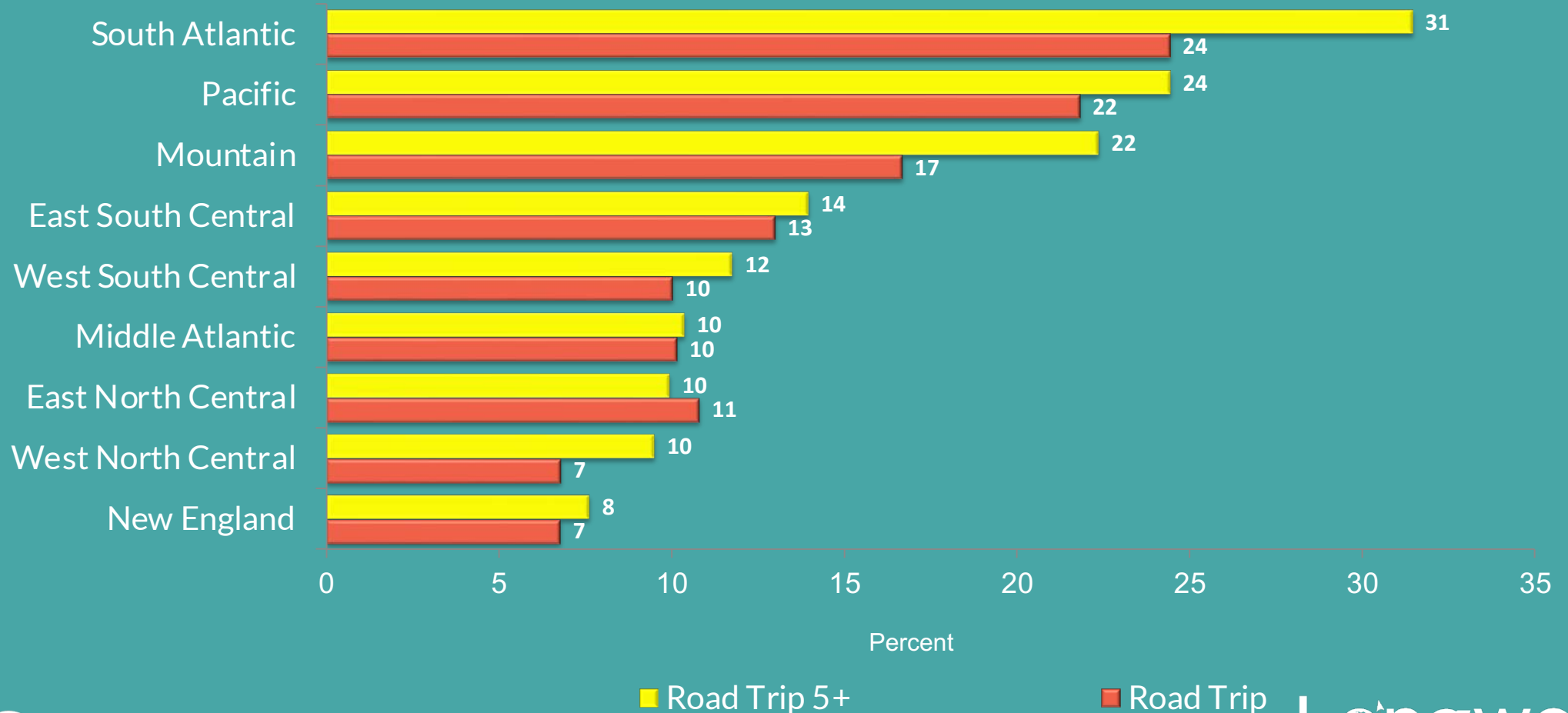


Hispanic/Latino

Road Trip 5+ Days vs. Standard Road Trip

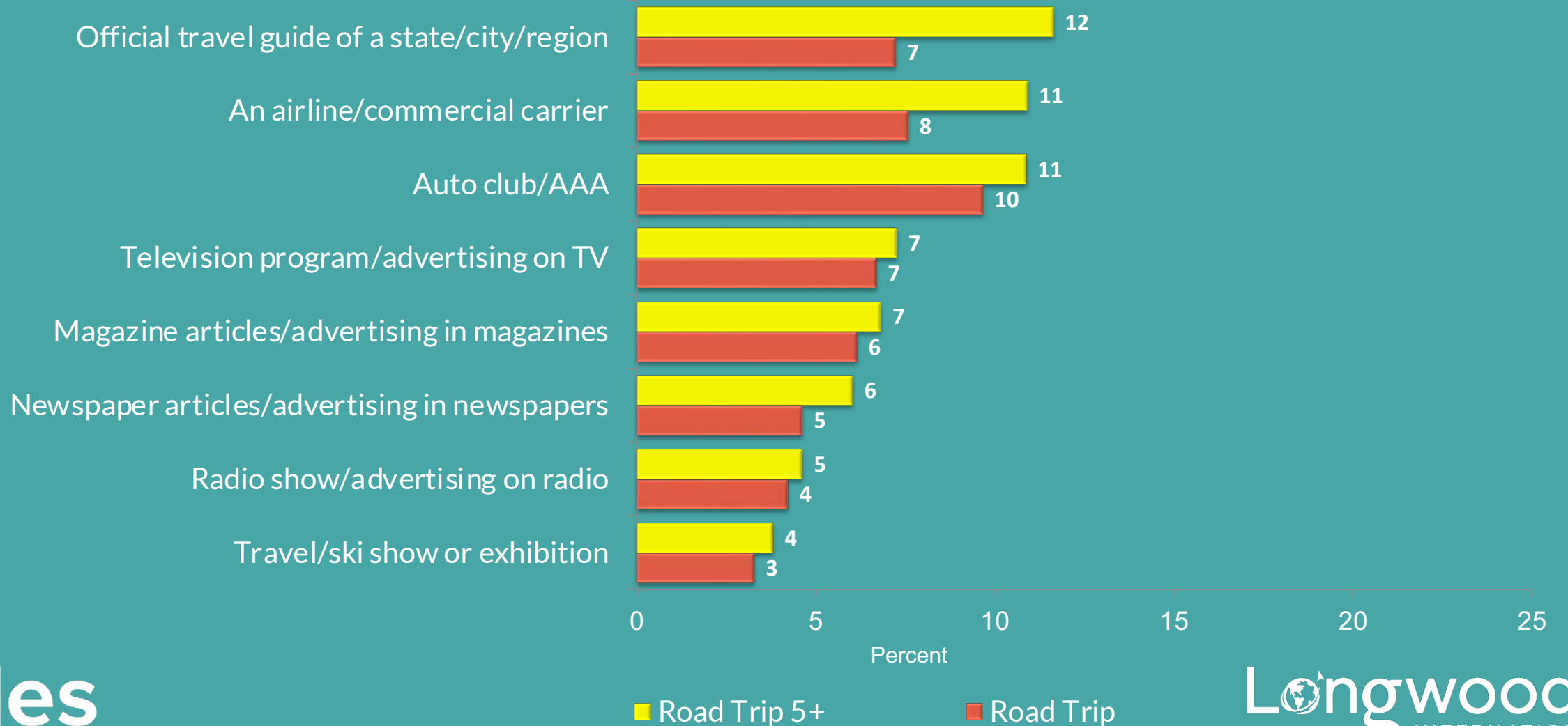
Regional Destination of Trip

Base: Overnight Person-Trips



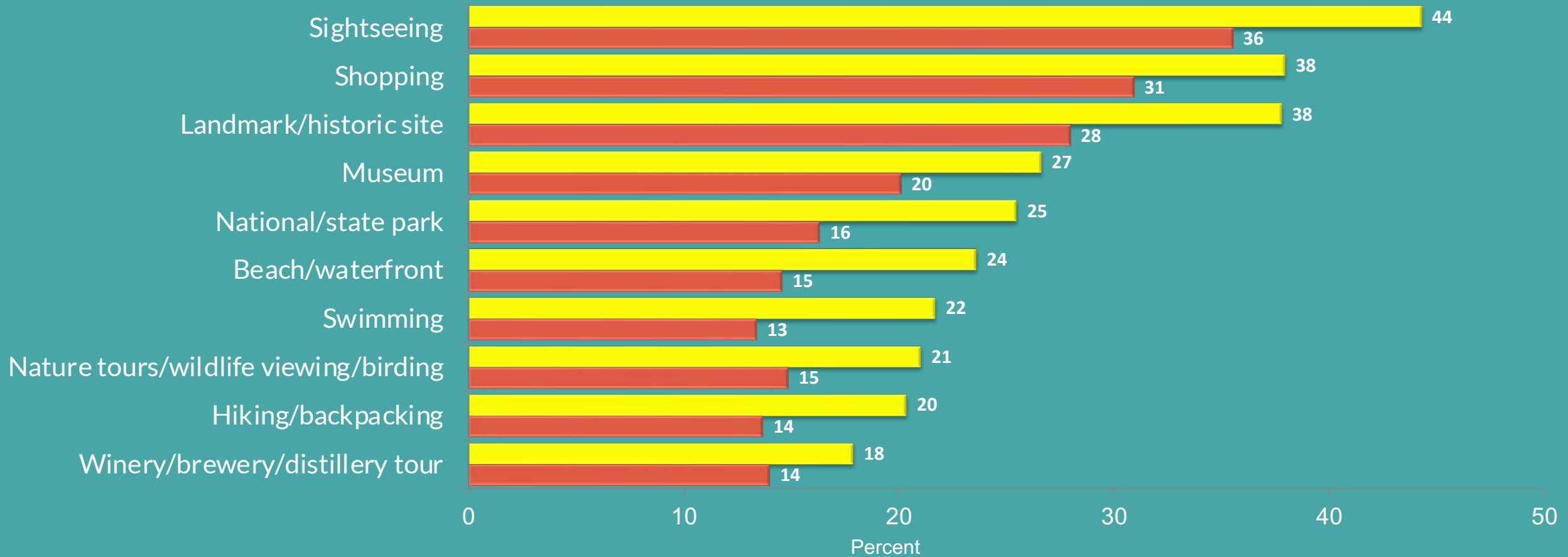
Trip Planning Information Sources (Cont'd)

Base: Overnight Person-Trips



Activities and Experiences

Base: Overnight Person-Trips

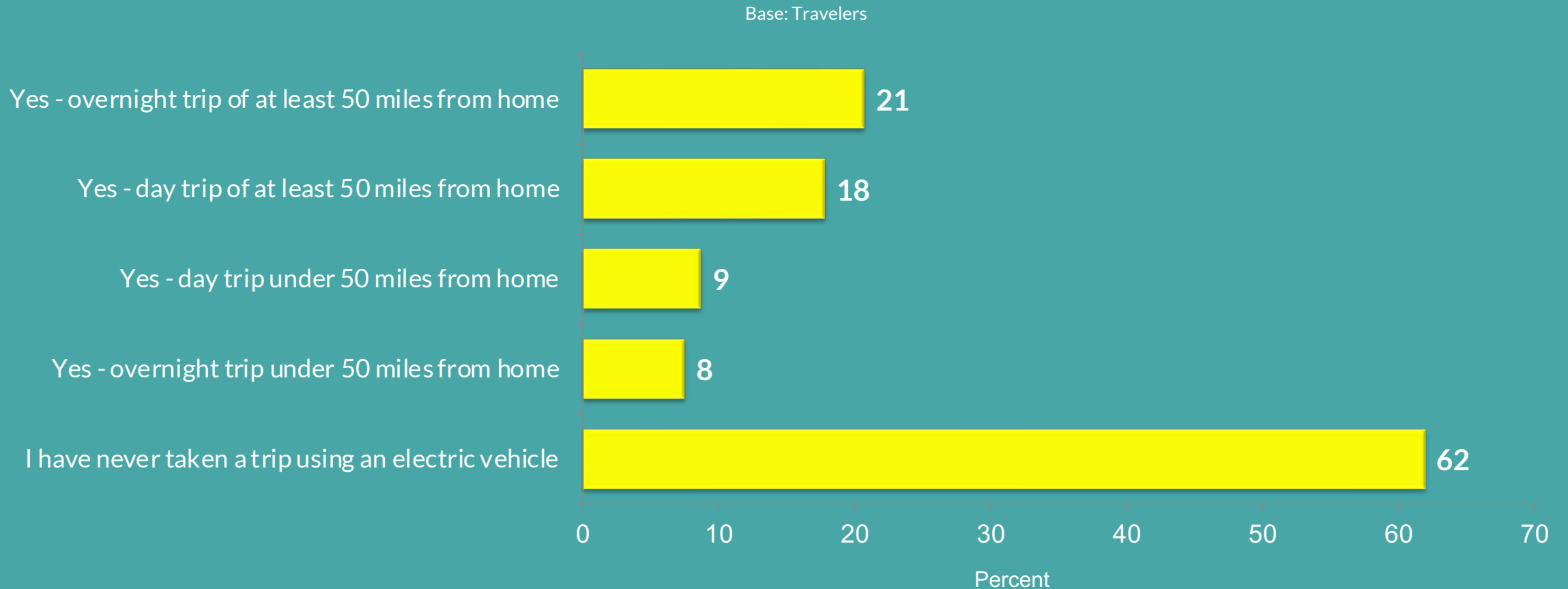


Electric Vehicles

Methodology

- Fielded July 7, 2023
- U.S. National Sample of 1,000 adults 18+
- Consumer online panel
- Qualified travelers have taken a trip more than 50 miles away and spent one or more nights away from home in the past 12 months
- Specific questions are also segmented on electric vehicle-oriented travelers.
Electric vehicle-oriented travelers have indicated they have used or plan to use an electric vehicle on a trip and/or own or have rented an electric vehicle

Used an Electric Vehicle to Travel on a Trip

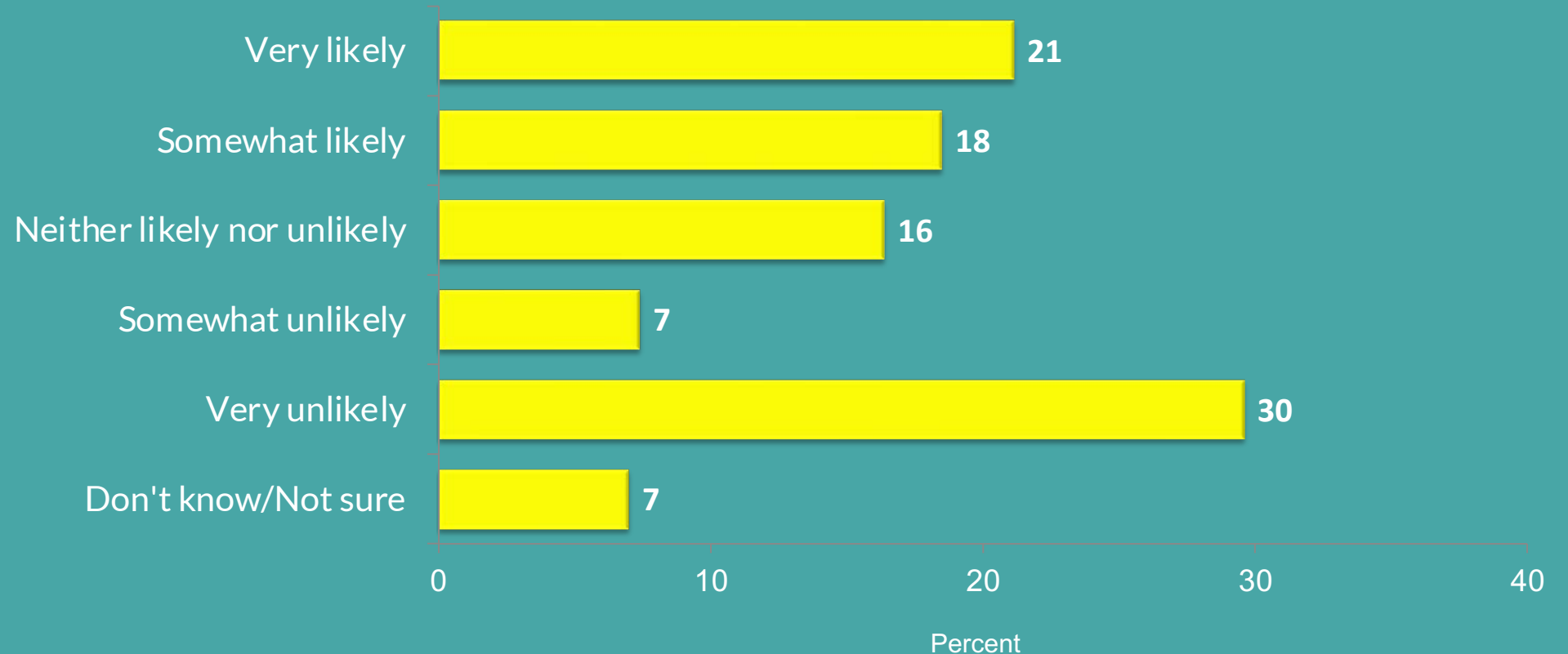


Likelihood to Use Electric Vehicle on Next Trip



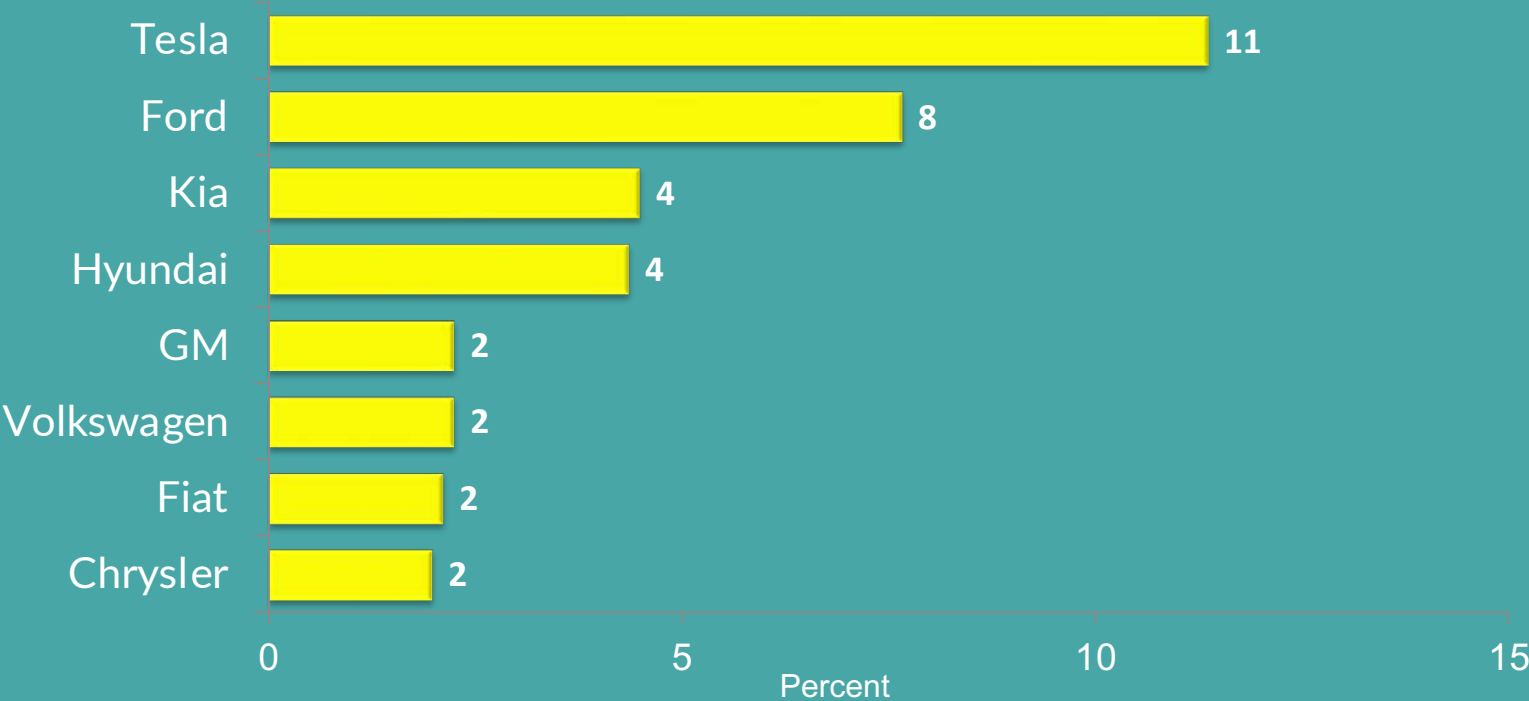
Likely

Base: Travelers



Currently Own or Lease an Electric Vehicle

Base: Travelers



64% I have never owned or leased an electric vehicle

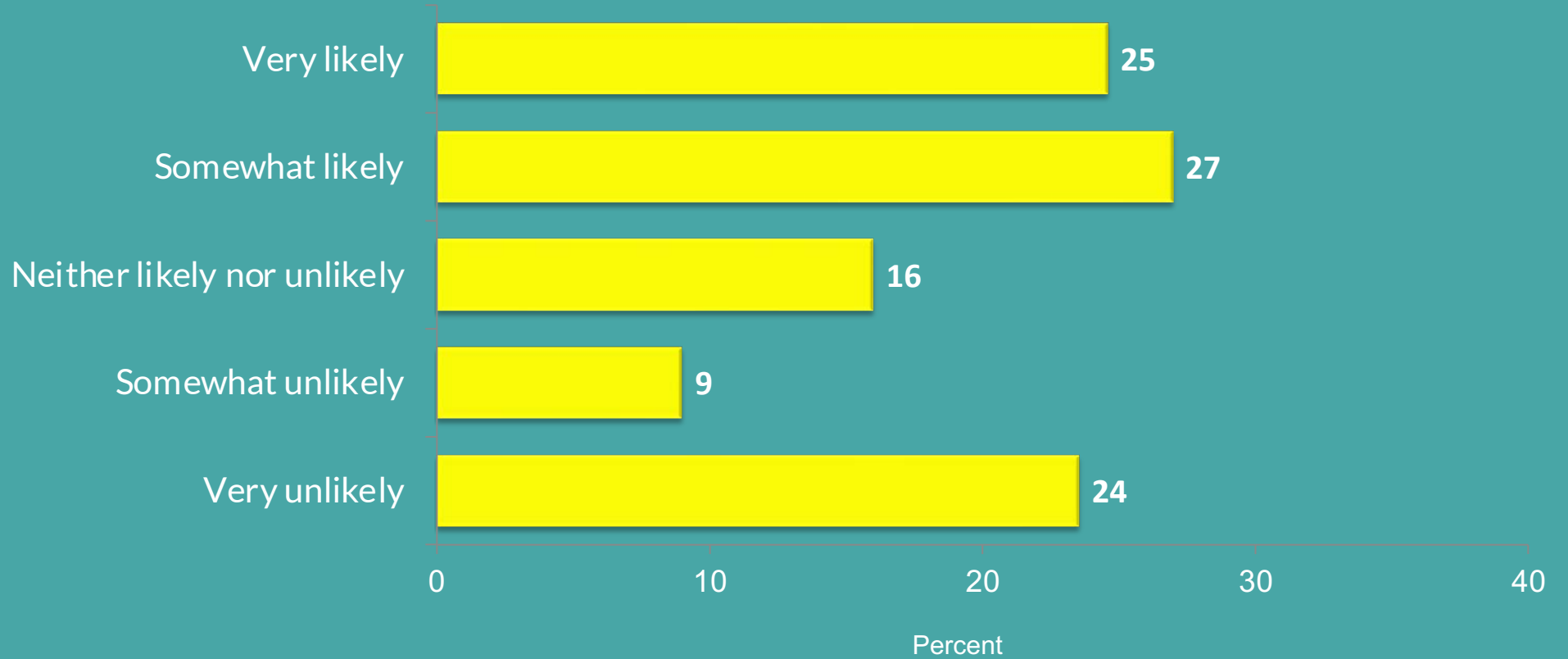
8% I do not currently own or lease an electric vehicle but have in the past

Likelihood Next Vehicle an Electric Vehicle

52%

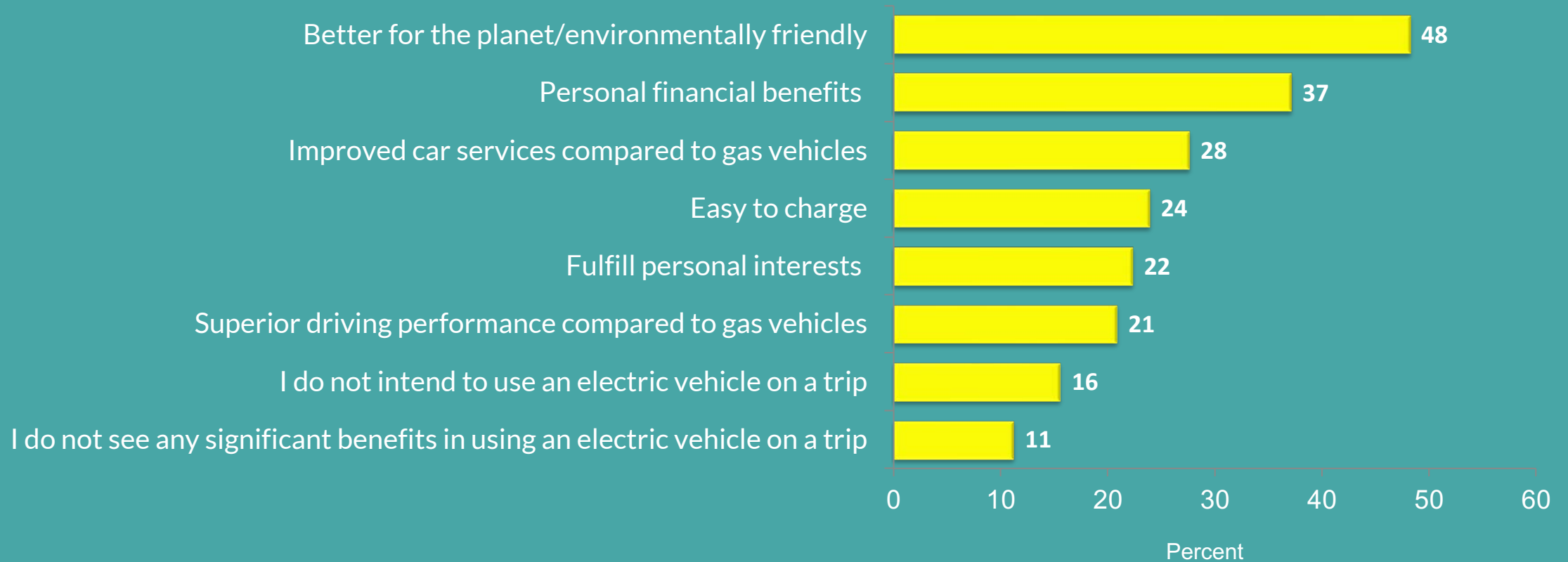
Likely

Base: Travelers



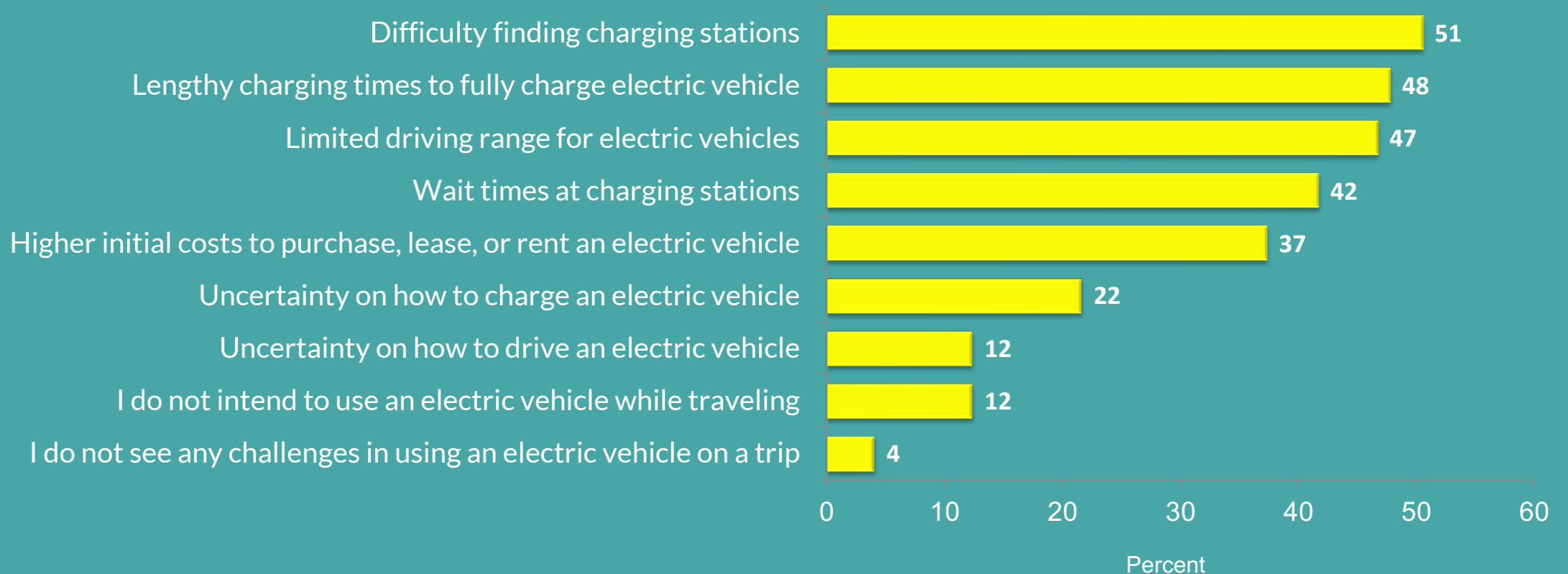
Primary Benefits of Using Electric Vehicle on a Trip

Base: Travelers



Primary Challenges of Using Electric Vehicle on a Trip

Base: Travelers

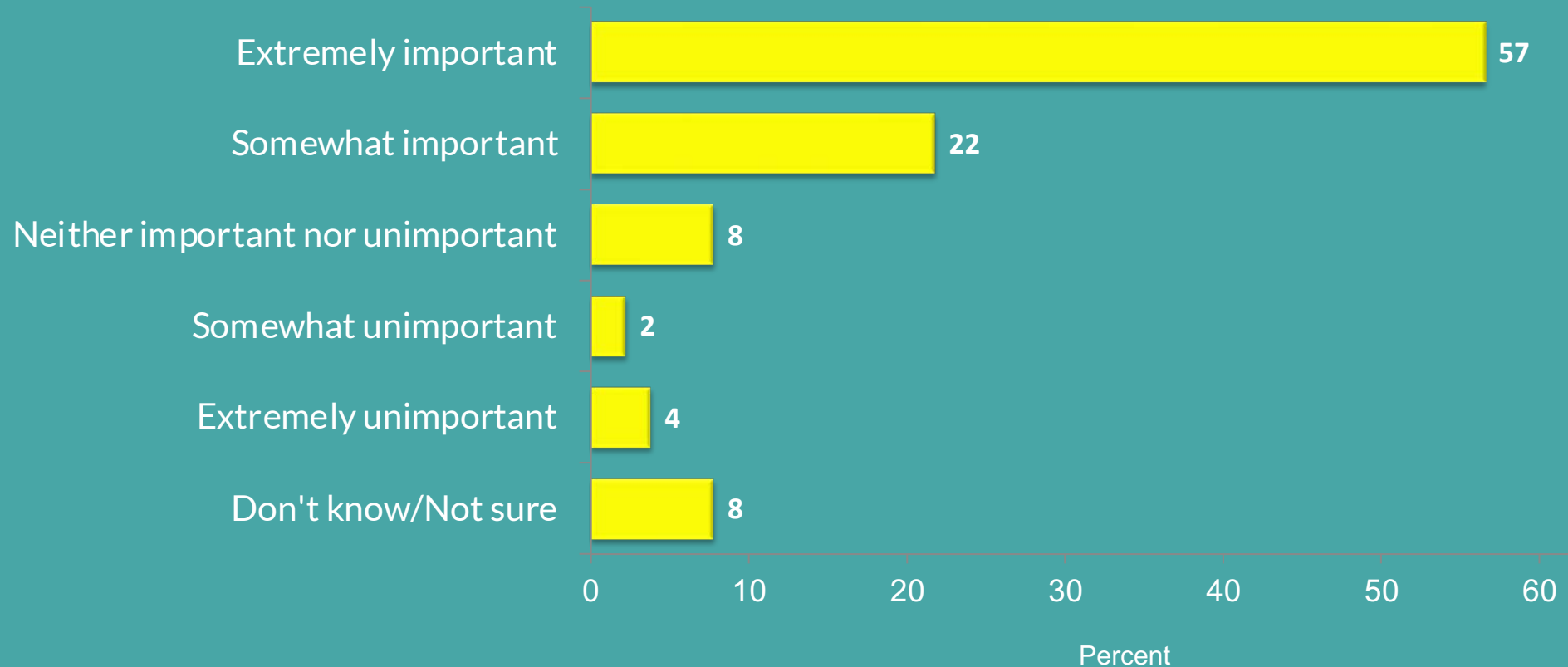


Importance of Travel Destinations Having a Wide Range of EV Charging Stations That Are Easy to Access & Use

79%

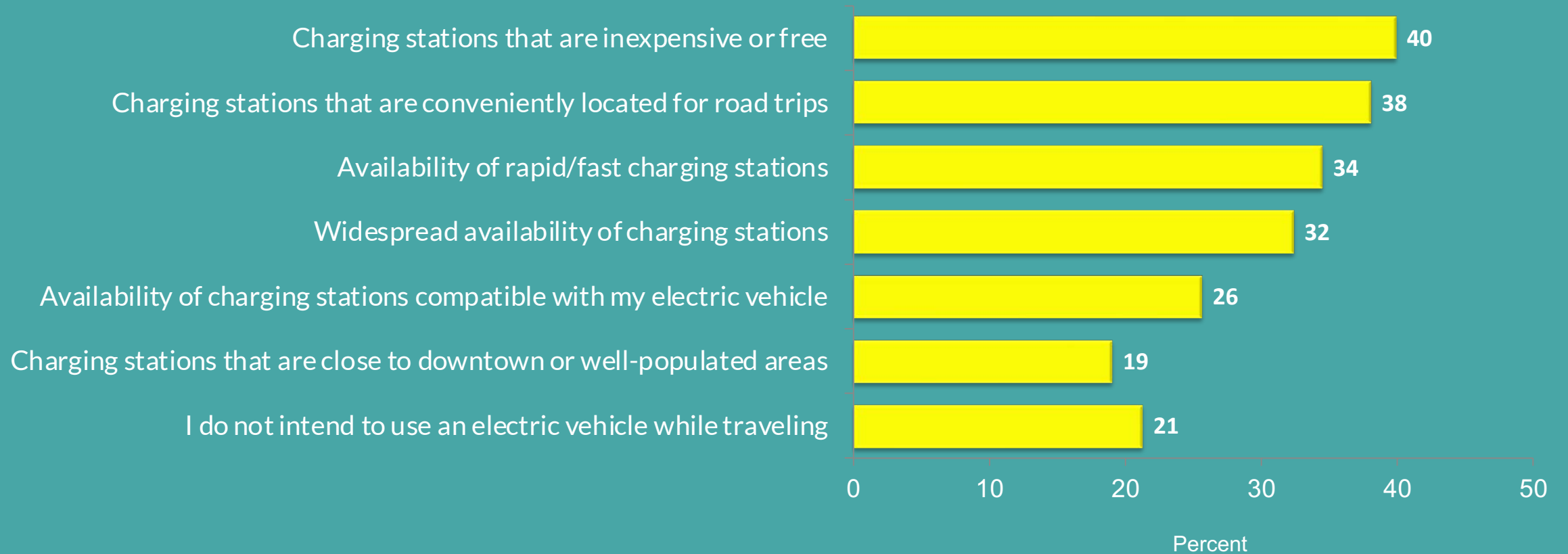
Important

Base: Travelers



Amenities/Services Increase Likelihood to Visit a Destination in an Electric Vehicle

Base: Travelers



Support of Government Action

Level of support for government efforts to phase out gas-powered vehicles and make electric vehicles the primary cars available on the market over the next 10 or so years



Support



Electric Vehicle-Oriented Travelers

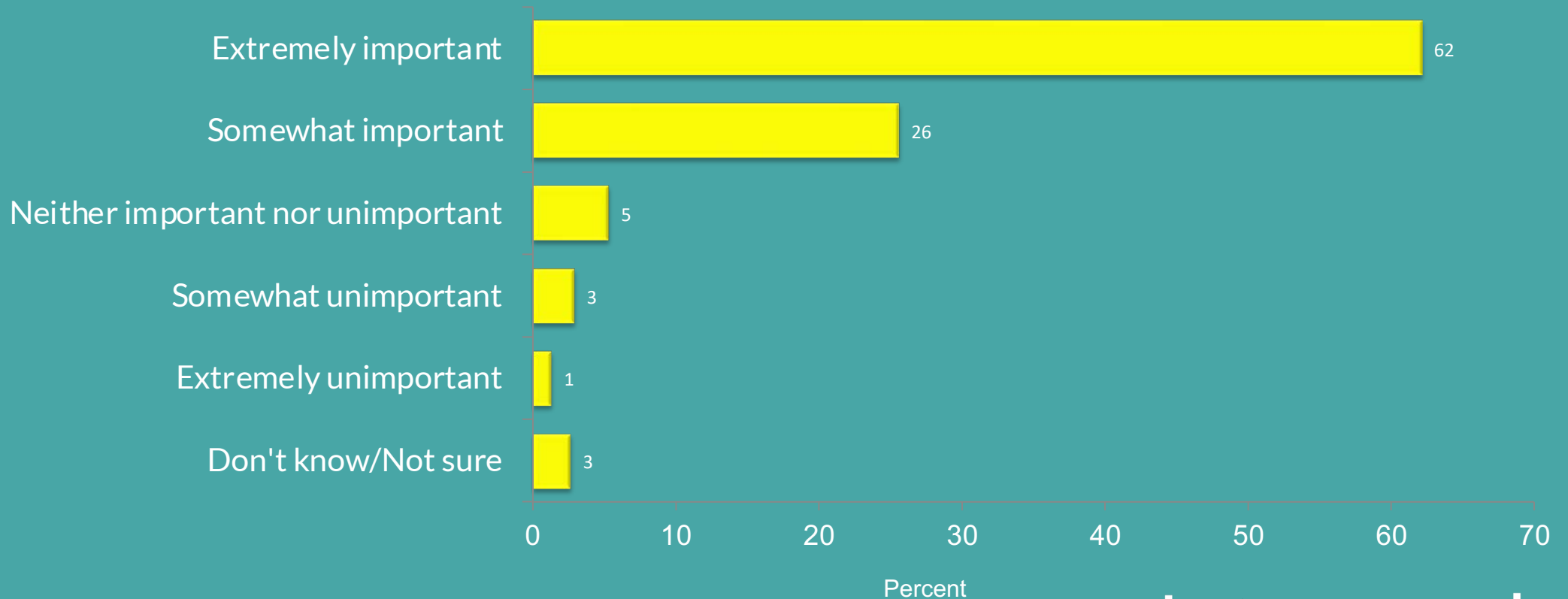
Importance of Travel Destinations Having a Wide Range of EV Charging Stations That Are Easy to Access & Use



88%

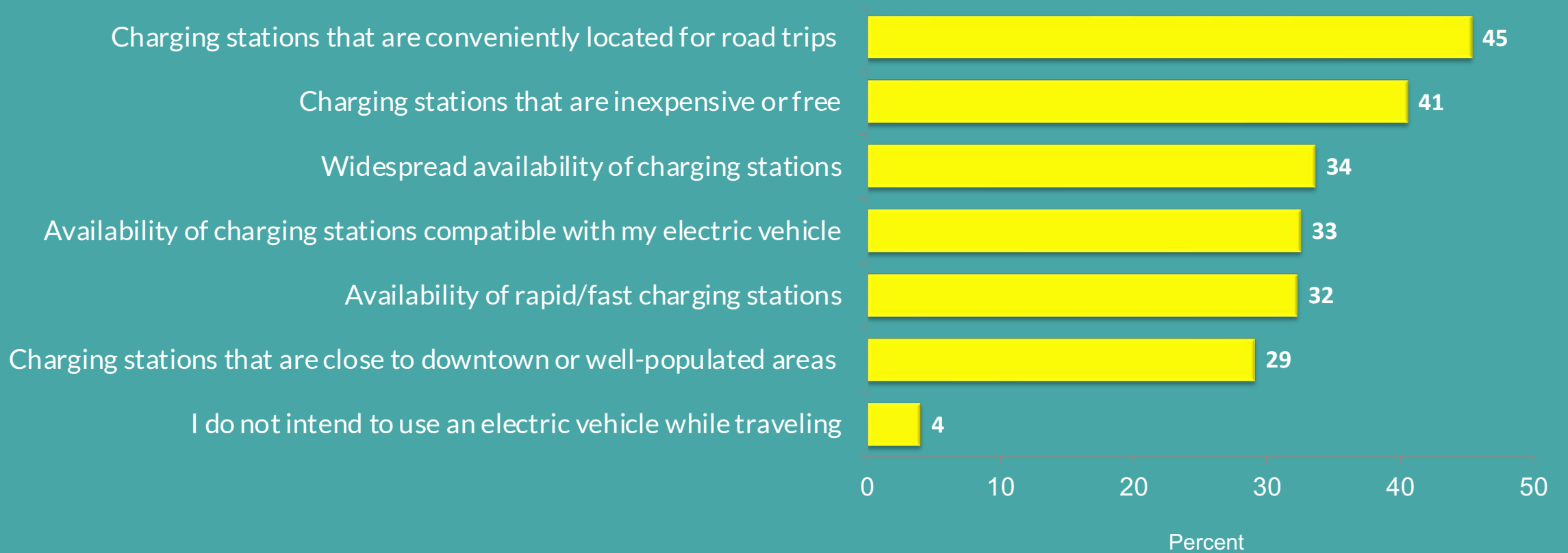
Important

Base: Electric Vehicle Oriented Traveler



Amenities/Services Increase Likelihood to Visit a Destination in an Electric Vehicle

Base: Electric Vehicle Oriented Traveler



Thank
You



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Colorado Electric Byways

August 9, 2023



COLORADO
TOURISM OFFICE

Colorado Tourism Office

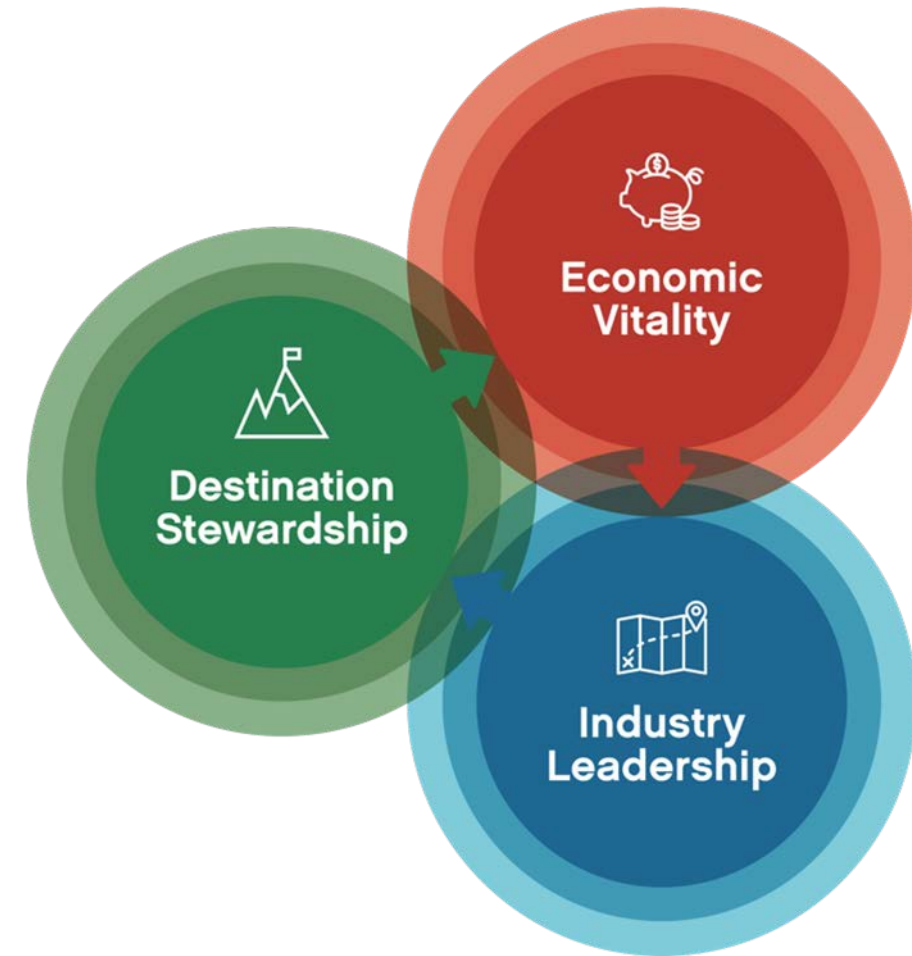
The Colorado Tourism Office (CTO) is the Destination Marketing and Management Organization for the state of Colorado.

The CTO is a division of the Colorado Office of Economic Development and International Trade (OEDIT) with a mission to achieve and sustain a healthy Colorado economy that works for everyone and protects what makes Colorado the best state in the country to live, work, start a business, raise a family, and retire.

Colorado Tourism Roadmap 2.0

Seeks to advance the strength and resilience of the Colorado tourism industry by focusing on:

- Economic Vitality
- Industry Leadership
- Destination Stewardship



Destination Stewardship in Colorado

Support for Colorado destinations that balances *quality of life for residents* and *quality of experience for visitors*, while *enhancing our environment and communities*



Colorado Electric Byways



Background

- The 2021 Colorado Greenhouse Gas Pollution Reduction Roadmap laid out a pathway for the state to achieve its GHG emission reduction targets of 26% by 2025, 50% by 2030, and 90% by 2050
- Transportation and mobility are priority areas identified in the roadmap



Background

- There is a very strong partnership between the Colorado Department of Transportation (CDOT), the Colorado Energy Office (CEO), and the Colorado Tourism Office (CTO) to achieve this goal
- These agencies collaborate on robust incentive programs:
 - EV Fast Charging Corridors
 - EV Plaza Program
 - ChargeAhead Colorado



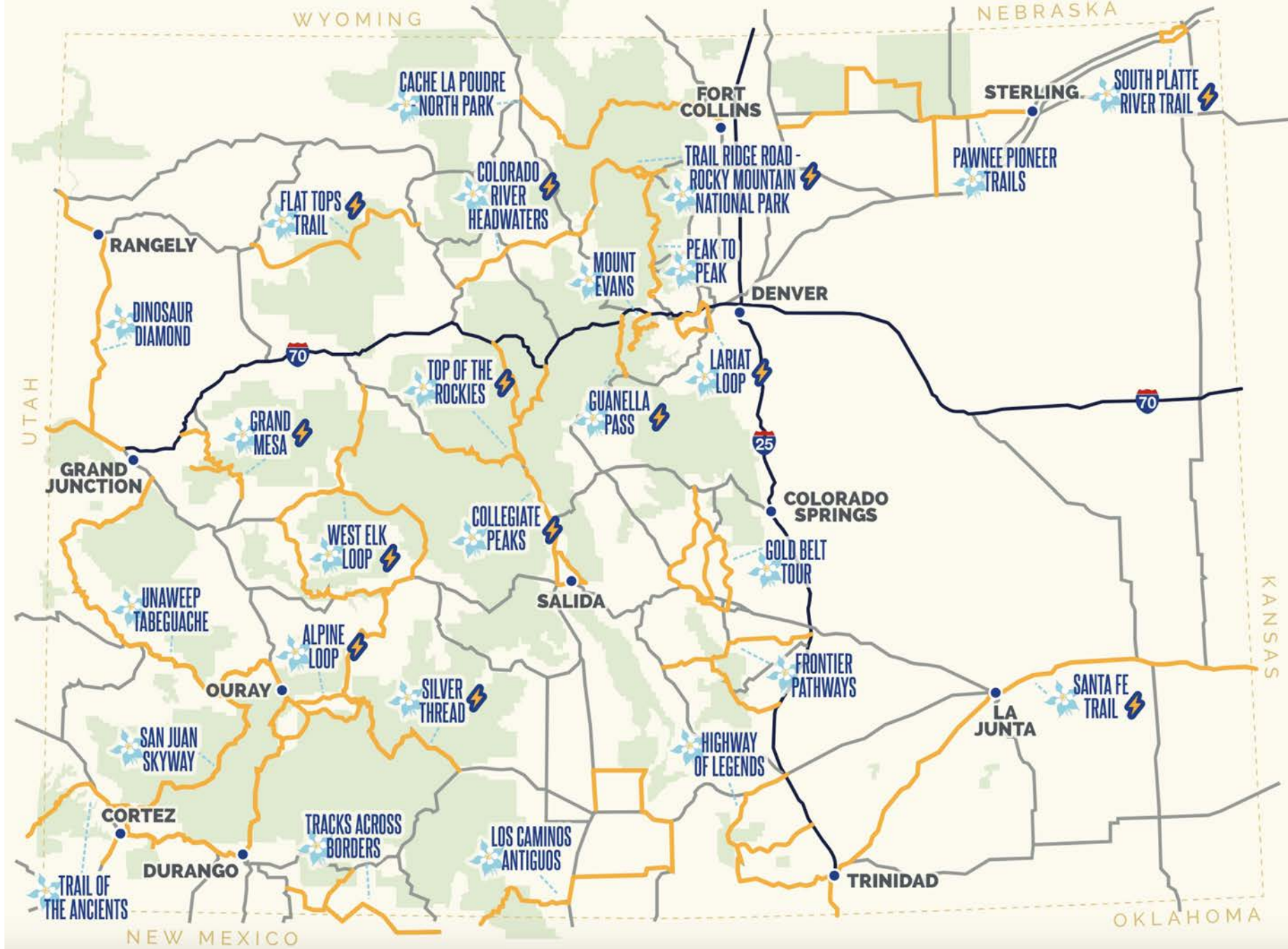
Colorado Electric Byways

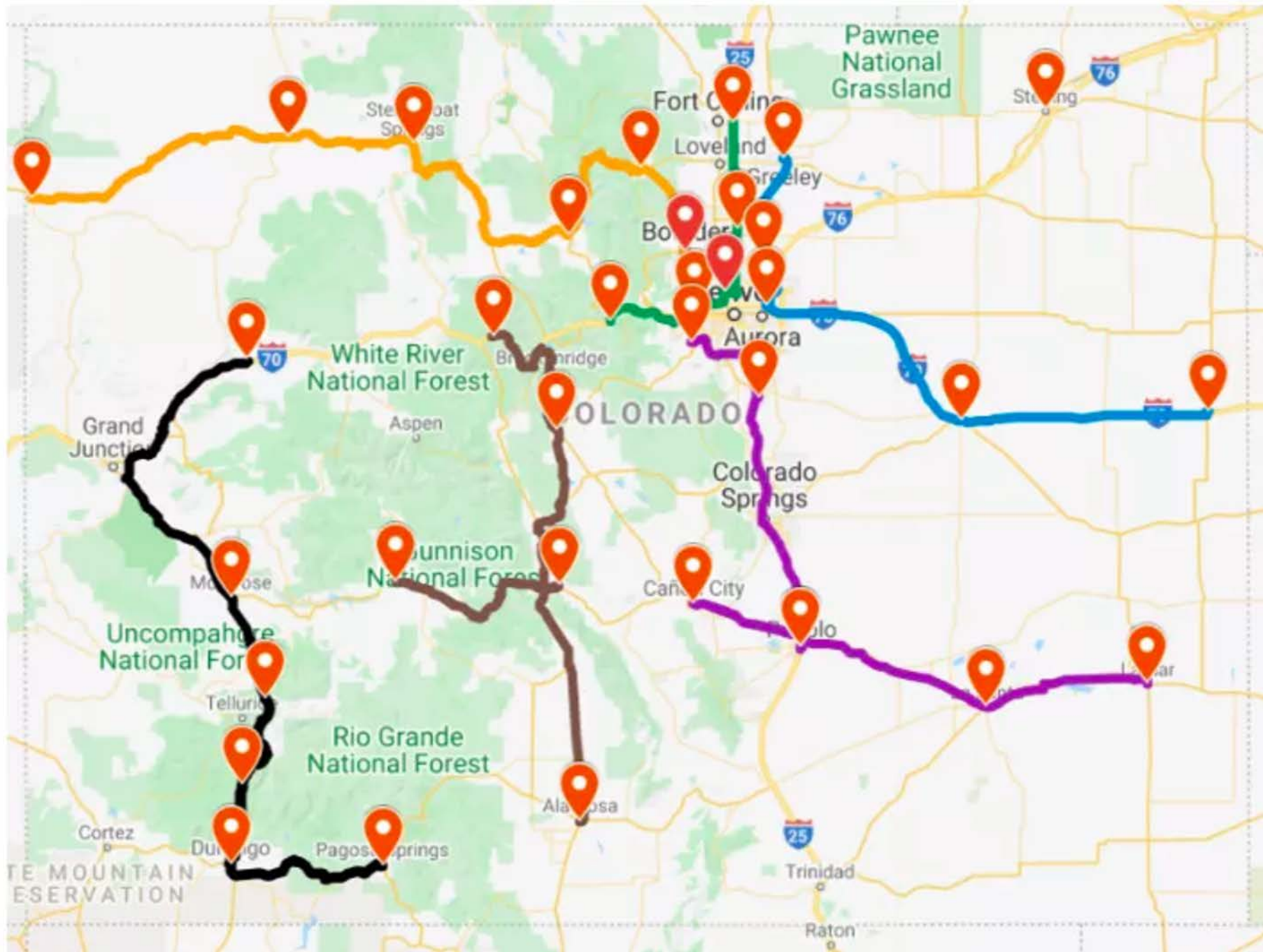
- Colorado has 26 Scenic & Historic Byways located throughout the state
- The State of Colorado has a goal to electrify all 26 of the byways
 - This goal is highlighted in the 2023 Colorado EV Plan
- 14 of 26 (54%) are currently under designation as Colorado Electric Byways



Colorado Electric Byways Definition

- DC Fast Charging stations are located at least every 100 miles within the start and terminus of each byway
- When byways are less than 70 miles, a DC fast charging station must be available within 15 miles of the start or terminus of the byway so that drivers can still access a charging station within 100 miles of starting their drive





Results

A silver Volvo sedan is driving on a gravel road that curves through a forest. The trees are in autumn, with many leaves turned yellow and orange. In the background, there are mountains under a clear sky. The car is in the center of the frame, moving towards the viewer. The overall scene is peaceful and scenic.

Results

- Allowed us to narrow our focus and be strategic with our resources
- We've invested in images that build range confidence
- We've garnered a lot of high-value earned media attention



Earned Media

The New York Times

SUBSCRIBE

Driving an Electric Car on Colorado's Scenic Byways

Will the battery hold out crossing a 10,666-foot pass? Where is the next charging station? Overcoming 'range anxiety' on Colorado's highest mountains.

Give this article



Independence Pass just outside of Aspen, Colorado © krblokhin / Getty

Catch your breath traversing the Colorado Rockies

The route: Denver to Aspen
Length: 160 miles

The New York Times

For Travel, a Sustainable Comeback?

From a newly certified Whale Heritage Site to scenic byways for electric cars, five new initiatives suggest the travel industry may be envisioning a more responsible future.

Give this article



TRAVEL+LEISURE

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On the Road Again

Summer is always high season for car rentals, but the coming months may pose some extra challenges. Elaine Glusac offers tips on how to navigate them.

IN THE PAST FEW YEARS, the road trip has become an American favorite again. Driving is the most popular form of travel, according to the American Automobile Association, but rising gas prices may change how many travelers plan their journeys. These tips will help.

SECURE A RENTAL CAR ASAP
With the onset of the pandemic, companies whittled down their idling fleets, only to run into supply-chain issues that kept them from expanding once travelers returned. Last year's shortage is expected to continue through 2022 and will be most acute in Hawaii, Alaska, Wyoming, and Montana. In Alaska, rates start above \$200 a day, and at Glacier Park International Airport in Montana, daily rentals are approaching \$400. Reserve a car well in advance of your trip, and set an alert through a discount tracker like **AutoSlash**

(autoslash.com) so you can rebook if the price drops.

TRY CAR SHARING

The rental-car shortage has been a boon for sharing platforms, which enable users to borrow cars for intervals as short as 30 minutes. **Turo** (turo.com), a person-to-person service that works similarly to Airbnb, saw year-over-year revenue more than triple in the first nine months of 2021. More than 160,000 vehicles are available in the U.S., Canada, and the U.K. A search in Denver turned up a Toyota Sienna for \$47 a day and a Maserati for \$180. The downside of car sharing is that, unlike with other rentals, you can't drive point-to-point, so you'll need to return it to the location where you picked it up.

FIND CHEAP GAS

Each year, the cost of fuel peaks in summer as demand increases, according

to the U.S. Energy Information Administration. To find affordable places to fill up your tank, download an app like **GasBuddy** (iOS and Android; free), which maps gas stations with current prices and offers a payment card for discounts. You can also search "gas" on Google Maps to see area stations and prices. Ditto the driving directions app Waze, which color-codes prices in red for high, yellow for average, and green for low.

CONSIDER AN EV

Climate change and high gas prices are pushing more consumers to try electric vehicles. Though EVs are scarce at rental agencies, Hertz has Tesla 3s at seven airport locations, including Los Angeles, Miami, and Dulles, in Washington, D.C. In San Francisco, a Hertz Tesla was recently \$219 a day compared with \$145 for a standard sedan. Turo is another option with EVs comprising roughly 7 percent of its fleet—that's about 11,000 cars.

Tesla has a proprietary network of charging stations and a navigation system that can also recommend charging stops. Non-Teslas share a

The most charging stations in the country can be found in California along Highway 99, which runs through the Central Valley to the wine region of Lodi. But other states are investing in the infrastructure, too. Colorado has electrified eight of its scenic byways, including several through the Rocky Mountains, while Oregon has six, including one themed around covered bridges.

The Road Ahead



The Road Ahead

- We'll continue to target earned media to build awareness of this initiative
- CEO is actively running a statewide EV CO adoption campaign using our images
- We are still working to enable visitors to rent electric vehicles during their stay



THANK YOU



COLORADO
TOURISM OFFICE

An aerial photograph of a winding asphalt road with yellow double lines, curving through a dense forest. The trees are mostly green, with some showing yellow and orange autumn colors. A small white car is visible on the road. The overall scene is scenic and natural.

Arizona & Electric Vehicles

Arizona Office of Tourism Mission

We **stabilize and strengthen** local economies, **protect** environmental and cultural resources, **create** a meaningful visitor experience, and **enhance** the quality of life for all Arizonans through tourism collaboration, promotion, and development.

An aerial photograph of a winding asphalt road with yellow double lines, curving through a dense forest. The trees are a mix of green and yellow, suggesting autumn. A small waterfall is visible in the lower-left corner. Several cars are driving on the road. The text "Where are we now?" is overlaid in white on the left side of the image.

Where are we
now?

Provide & Update Information

https://www.visitarizona.com/plan/tips/electric-cars/

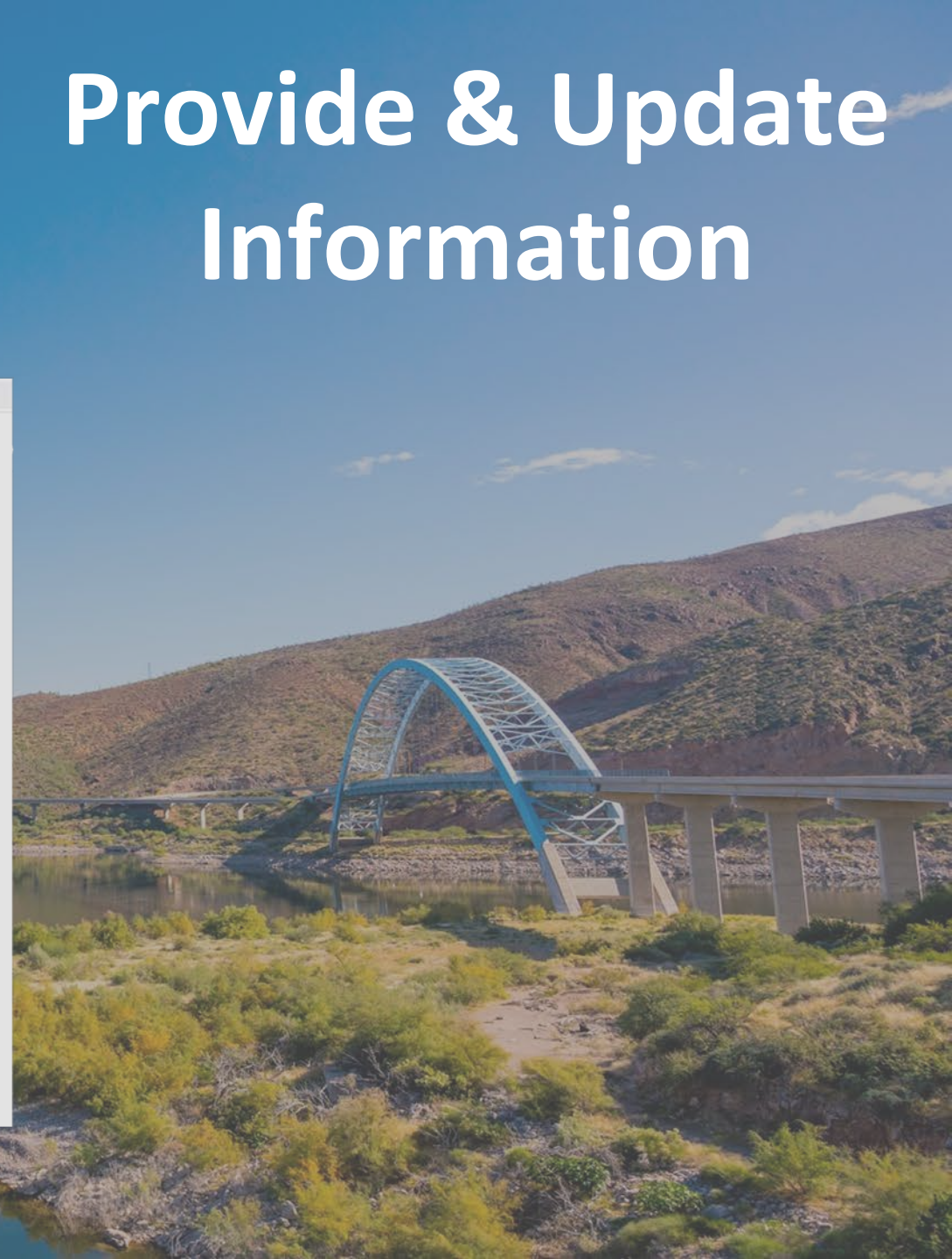

ARIZONA
THE GRAND CANYON STATE

Home / Plan Your Trip / Travel Tips / Electric Vehicles

TRAVEL SUSTAINABLY
ELECTRIC VEHICLES

.....

Given the ever-increasing number of electric vehicles on the road today, we're excited to help make a trip to Arizona even easier. With unique itineraries and resources for planning routes and trip details, you'll stay charged and keep moving forward to the next great destination.



Flagstaff, Arizona



search for a station by name, address, or city Charging locations from PlugShare [Get the App](#)

Lowell Observatory
Thorpe Park Sports & Recreation Complex
Flagstaff Medical Ctr
Thorpe Park
Flagstaff
Southside Neighborhood
Whole Foods Market
Riordan Mansion State Historic Park
Northern
Buffalo Park
Fat Oliv
Walmart Supercenter
Cracker Barrel Old Country Store
Little America
Delhi Palace

Google Keyboard shortcuts Map data ©2023 Google 500 m Terms of Use Report a map error

An aerial photograph of a winding asphalt road with yellow double lines, curving through a dense forest. The trees are mostly green, with some showing yellow and orange autumn colors. A small waterfall is visible in the lower-left corner. Several cars are driving on the road. The text "Where are we going?" is overlaid in white on the left side of the image.

Where are we
going?

Goals

- Expand Current Partnership
 - Statewide Agencies
 - Stakeholders
 - Power Companies
- Obtain Funding to Expand EV Chargers
 - Arizona Information Visitor Centers
 - Route 66
 - Fill Gaps

An aerial view of a street intersection in Winslow, Arizona. In the center of the intersection is a large, shield-shaped road sign that reads "ARIZONA US 66". To the left, a brick building has "WINSLOW ARIZONA" written on its facade. A red pickup truck is parked on the right side of the street. Several people are walking on the sidewalks. The scene is set in a town with various buildings and trees.

Thank you!

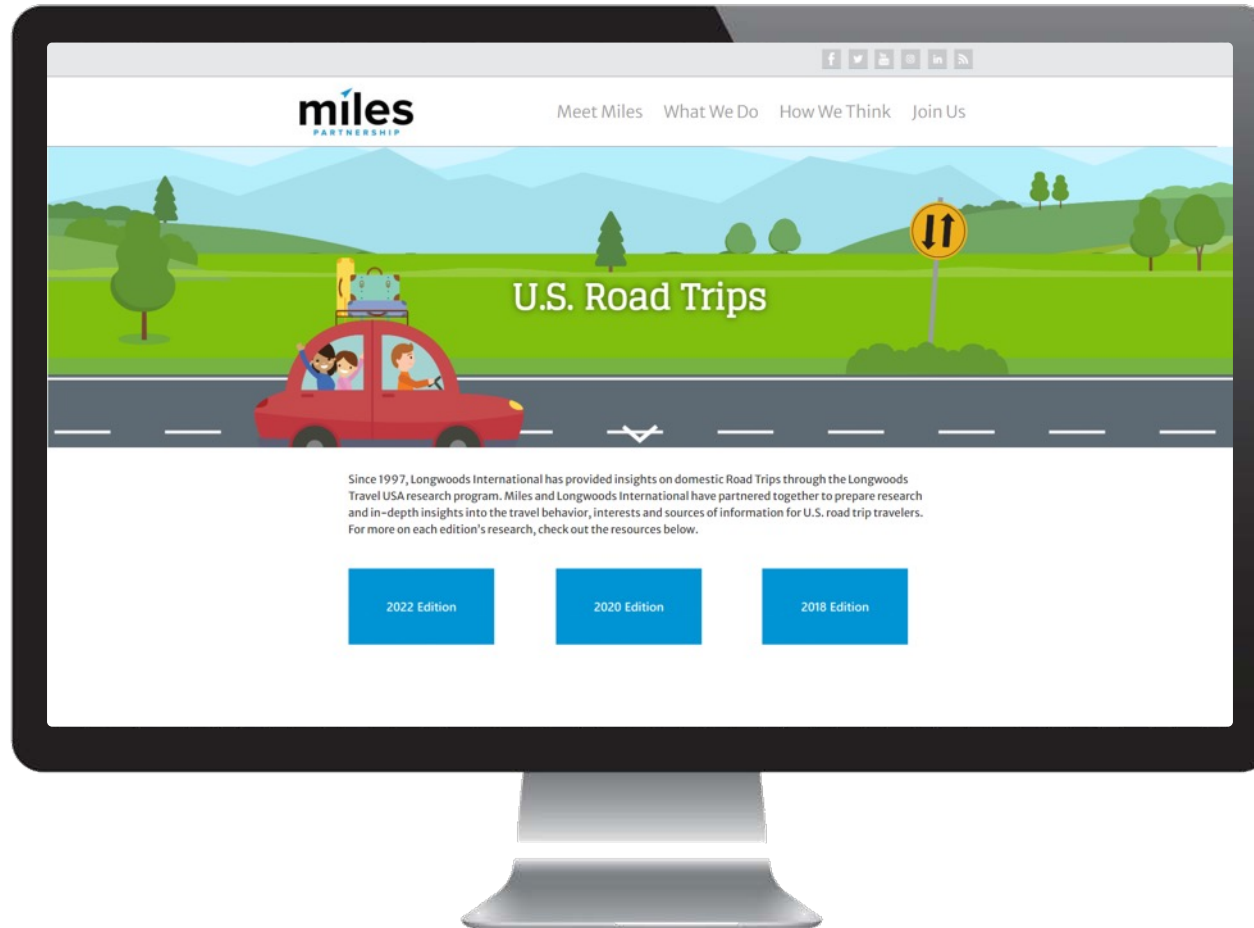


Q&A

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RESEARCH AND ADDITIONAL RESOURCES

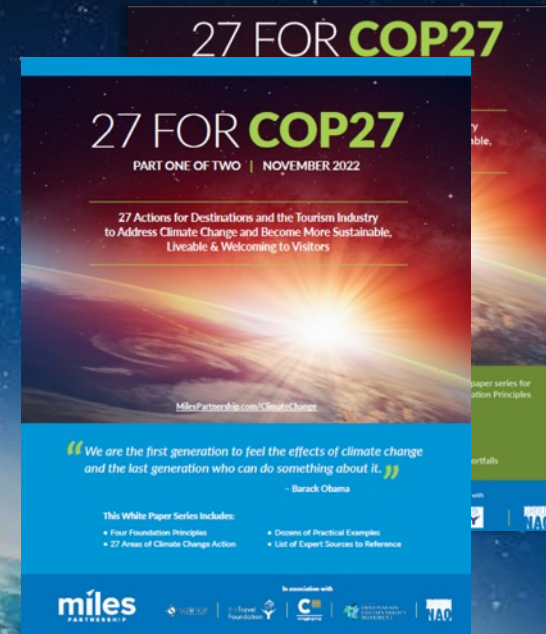


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27 for COP27

27 Actions for Destinations and the Tourism Industry to Address Climate Change

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