

THE STATE OF THE AMERICAN TRAVELER:

TRAVELER SEGMENTS EDITION

SEPTEMBER 2, 2021

Destination  Analysts

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*Tourism Program Manager
National Park Service*

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Research, slides and other resources will be available at

www.milespartnership.com/SAT

www.destinationanalysts.com

Check out the Online Insights Dashboard,
Available Now!

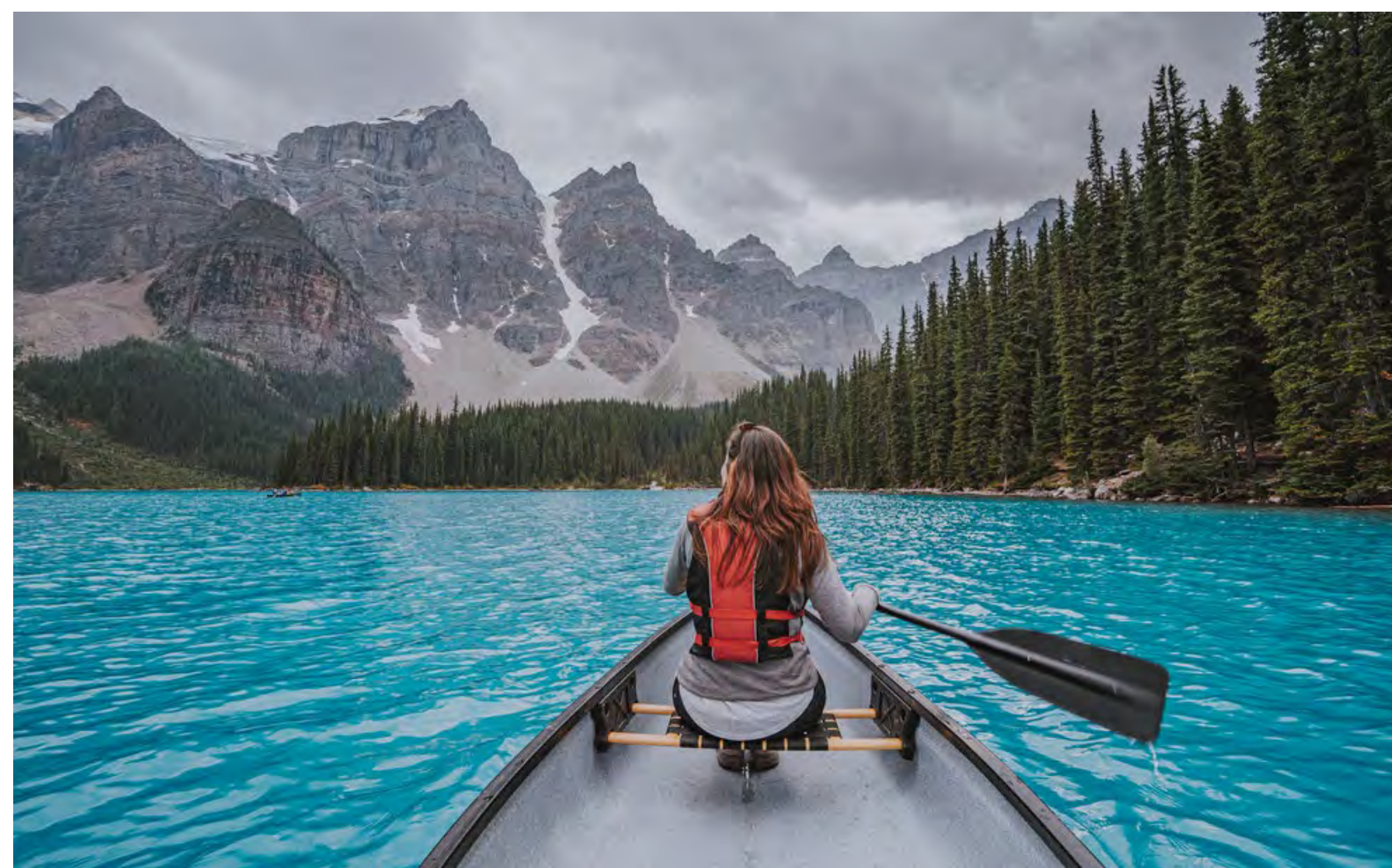


Agenda

1. Current Traveler Sentiment
2. Traveler Segments Edition Research
 - National Parks Travelers
 - Outdoor Enthusiasts
 - Likely International Travelers
3. Interview with Donny Leadbetter, National Park Service
4. Additional Resources
5. Q&A

THE STATE OF THE AMERICAN TRAVELER

Segments Edition, 2021



The State of the American Traveler



- Quarterly online survey conducted since 2006
- Data collected in mid July 2021
- Examines traveler sentiment, motivations & behaviors
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000 American leisure travelers

AGENDA

- **Traveler optimism and expectations**

Three
Segments

- **National Parks Travelers**
- **Outdoor Enthusiasts**
- **Likely International Travelers**



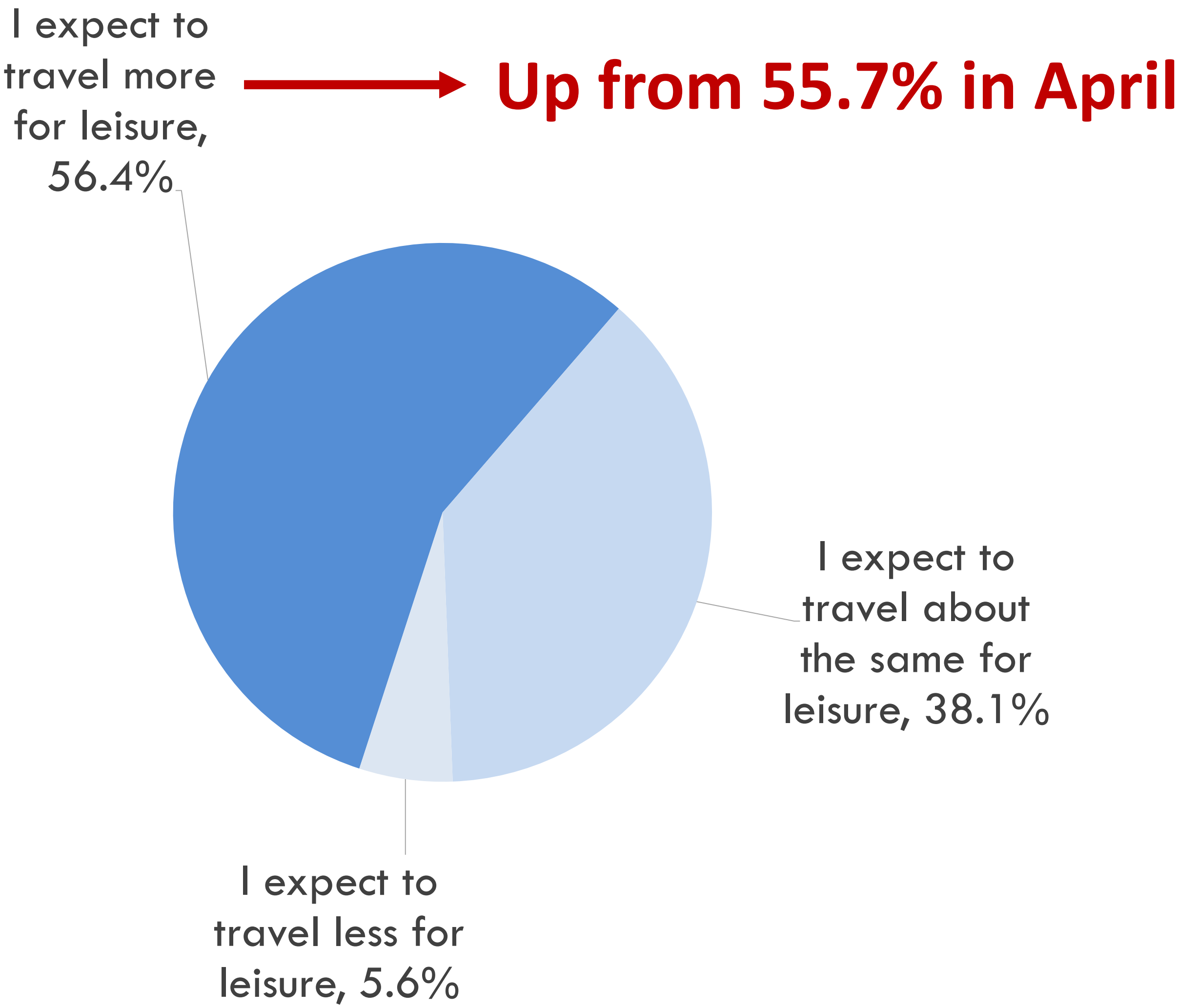
CURRENT TRAVELER SENTIMENT



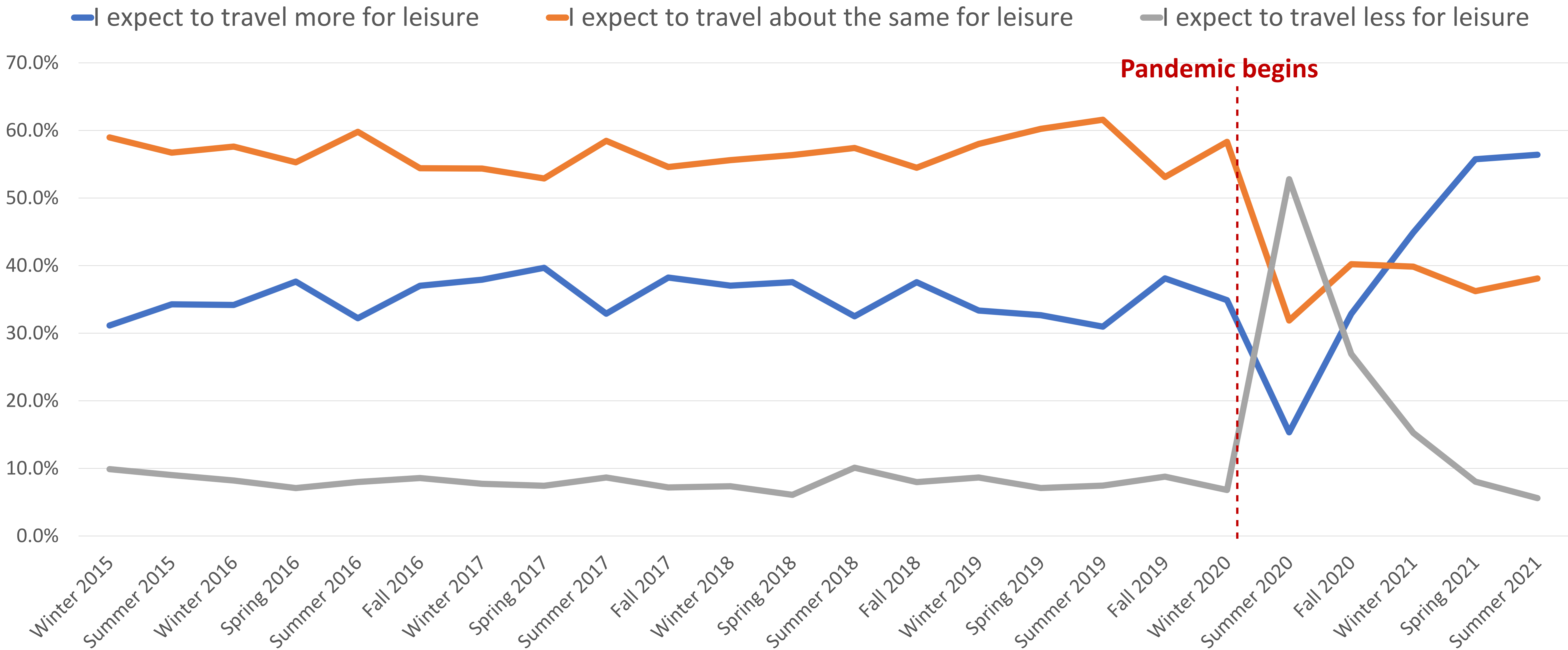
Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?

TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS

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)

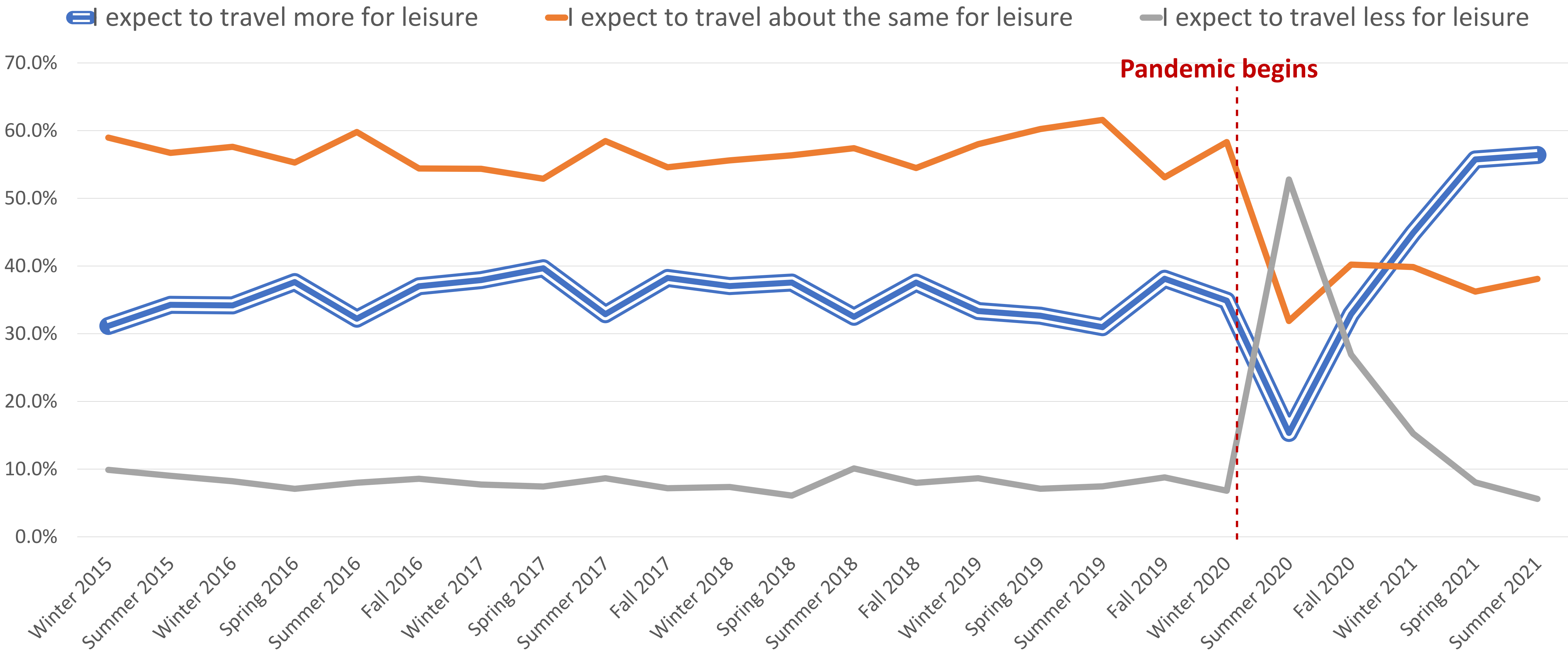


TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



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TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS



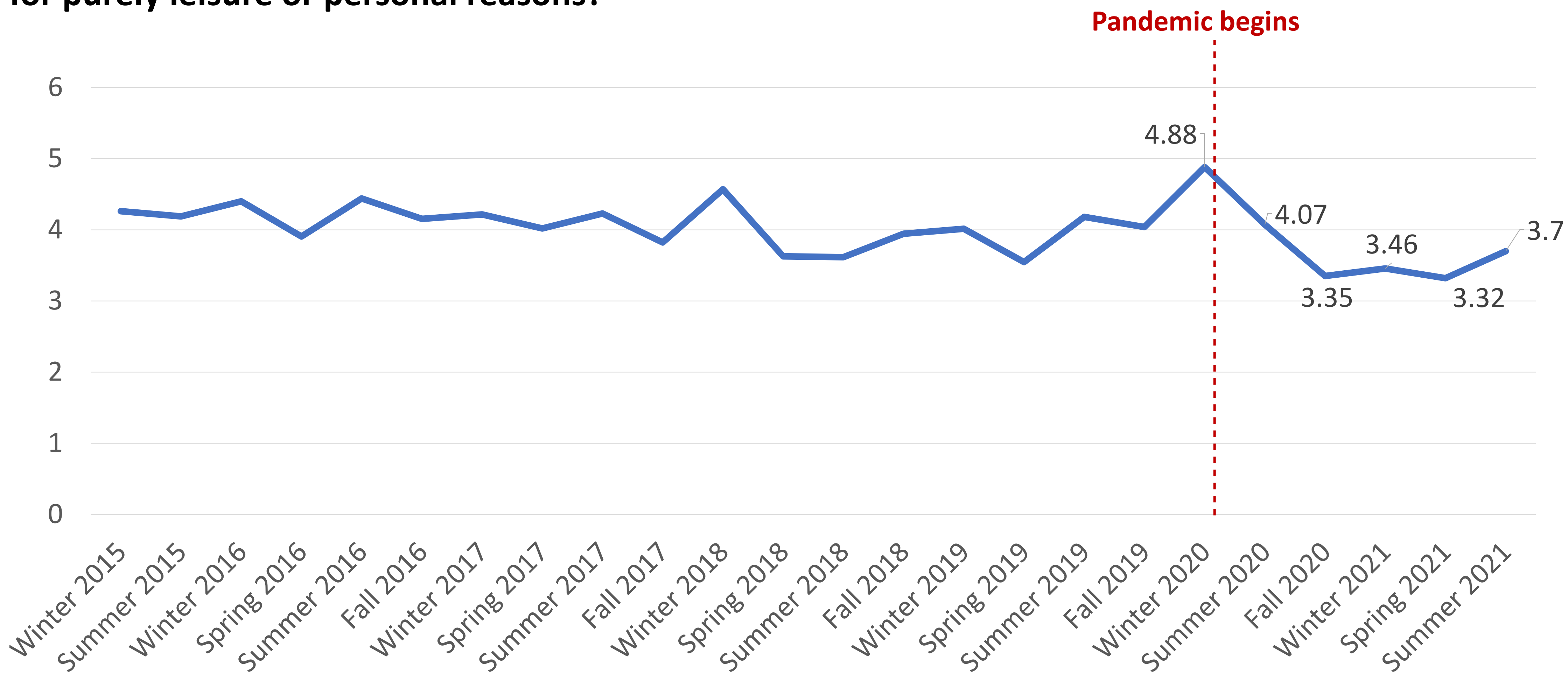
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Question: In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?



LEISURE TRIPS IN THE PAST 12 MONTHS

Question: In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?

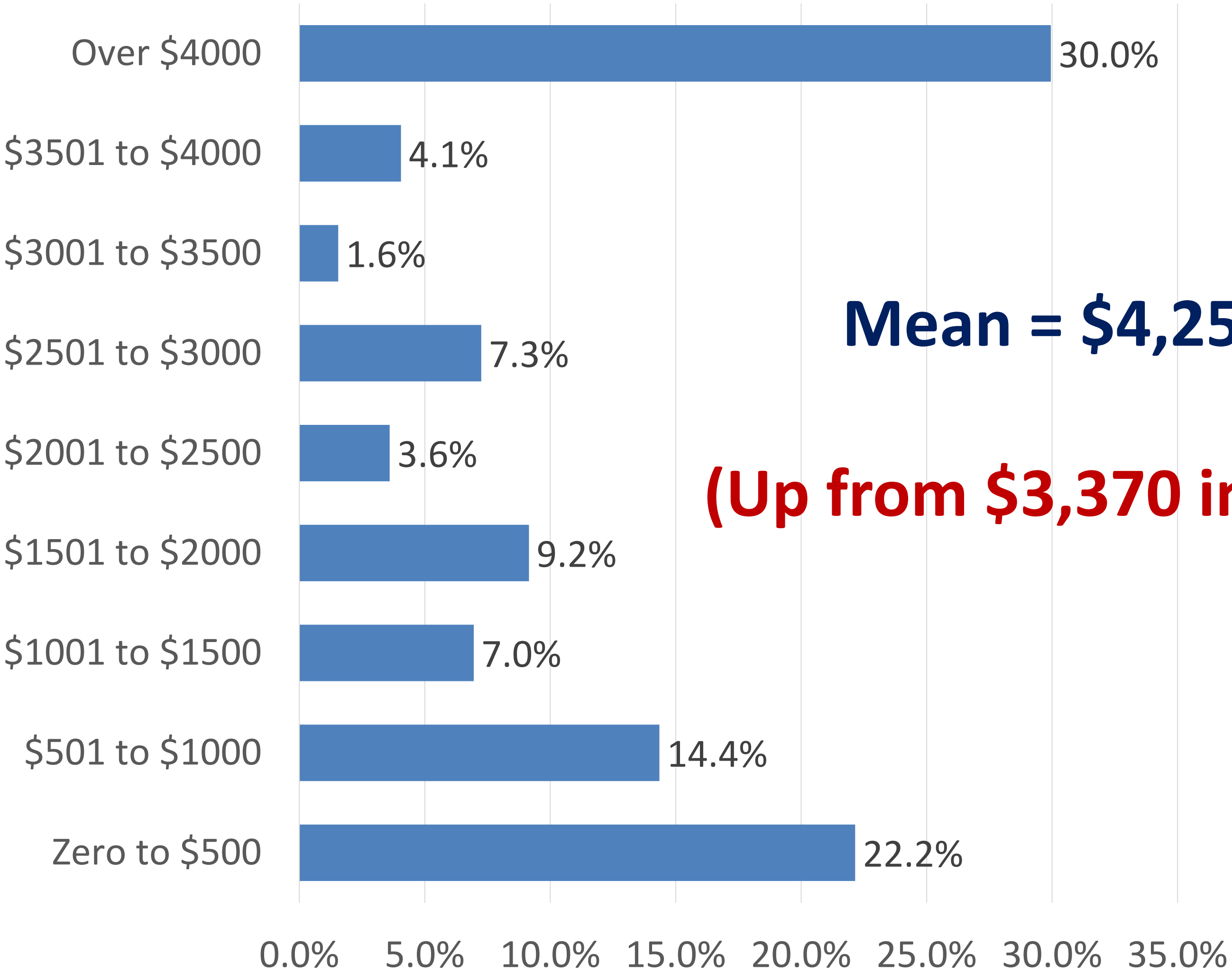


How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?



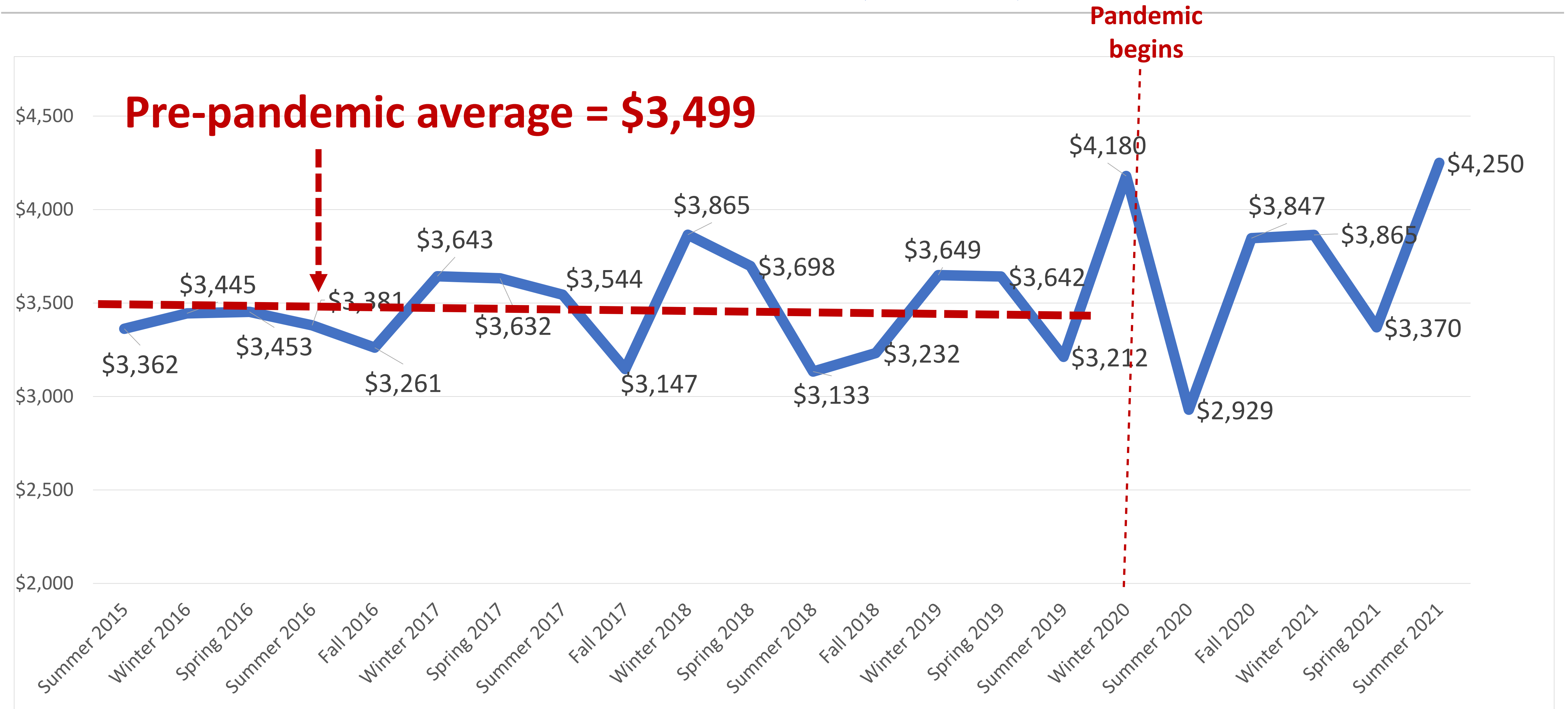
MAXIMUM LEISURE TRAVEL BUDGET

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 TWELVE (12) MONTHS?



Mean = \$4,250
(Up from \$3,370 in April)

MAXIMUM LEISURE TRAVEL BUDGET (MEAN)



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 TWELVE (12) MONTHS?

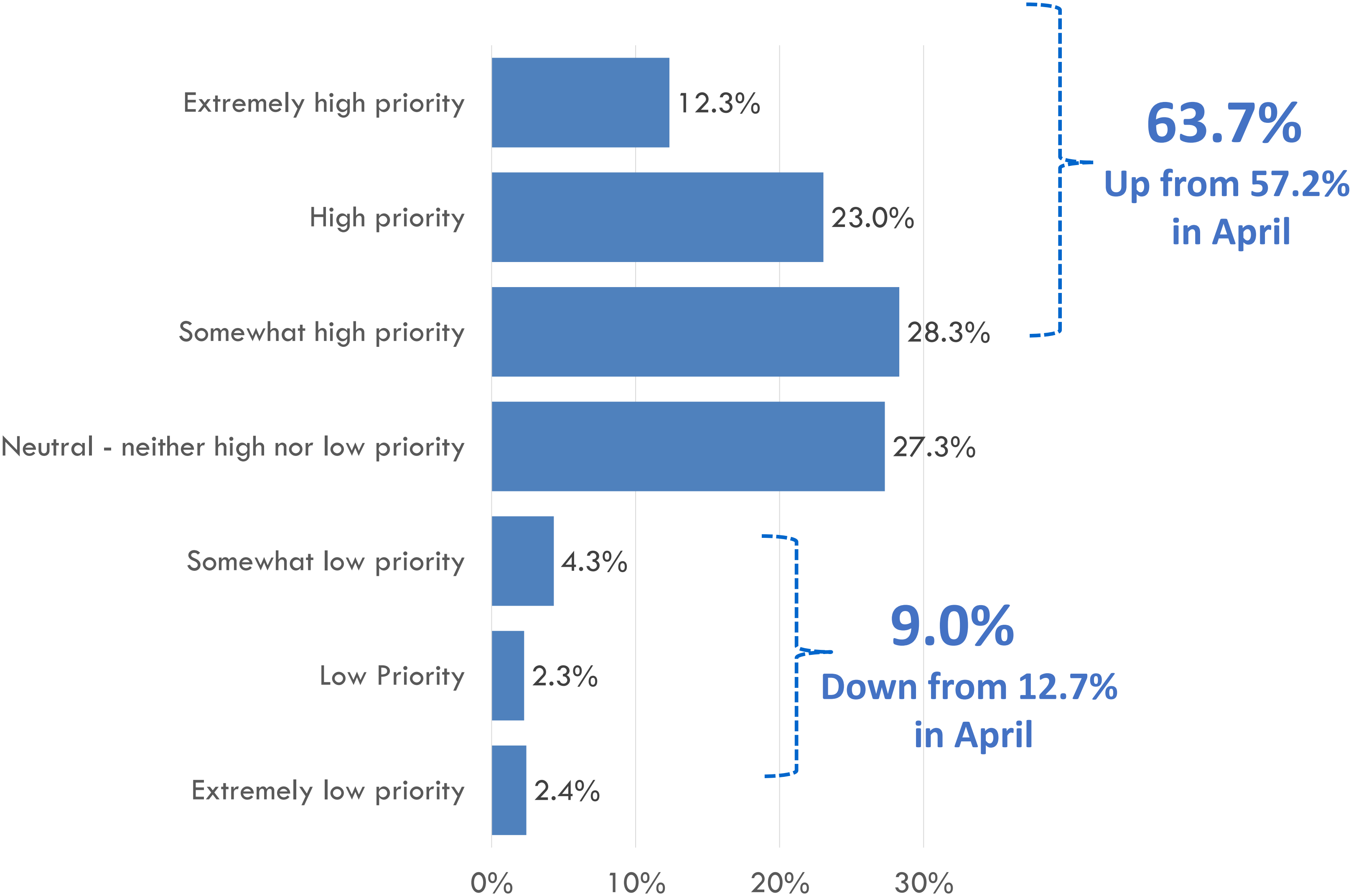


Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.

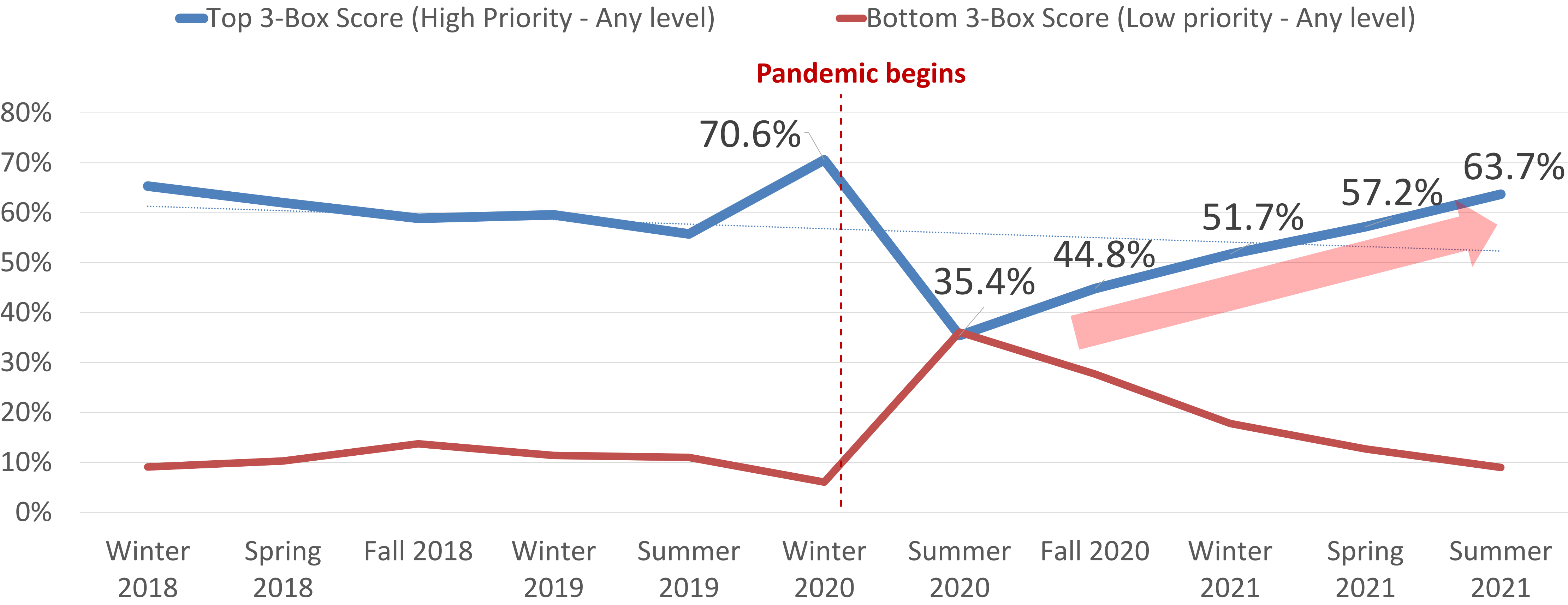
LEISURE TRAVEL AS A SPENDING PRIORITY

Question: Thinking carefully about how you expect to spend your income in the **NEXT 12 MONTHS**, please use the scale below to describe your spending priorities in next year.

Leisure travel will be a _____



LEISURE TRAVEL AS A SPENDING PRIORITY



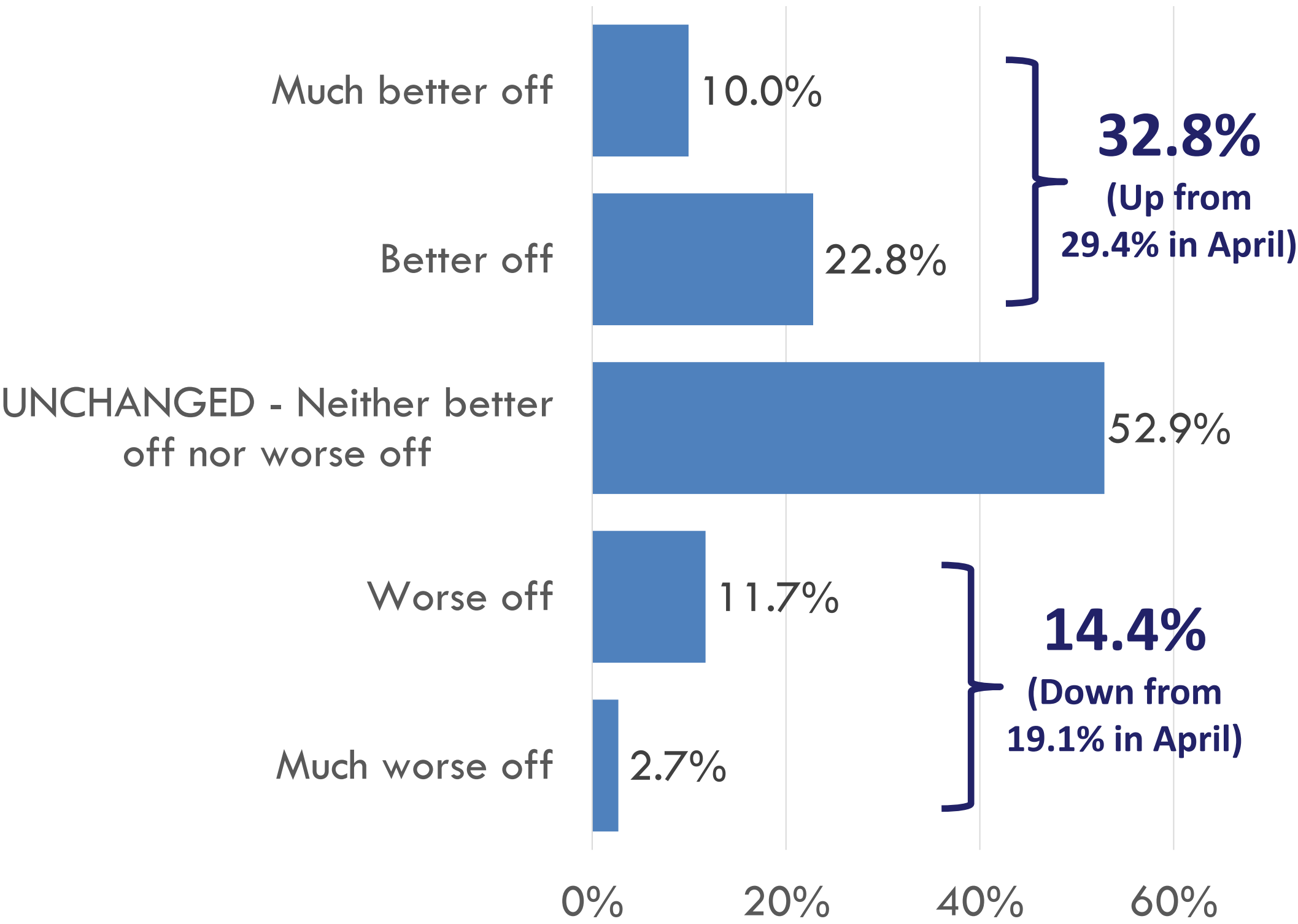
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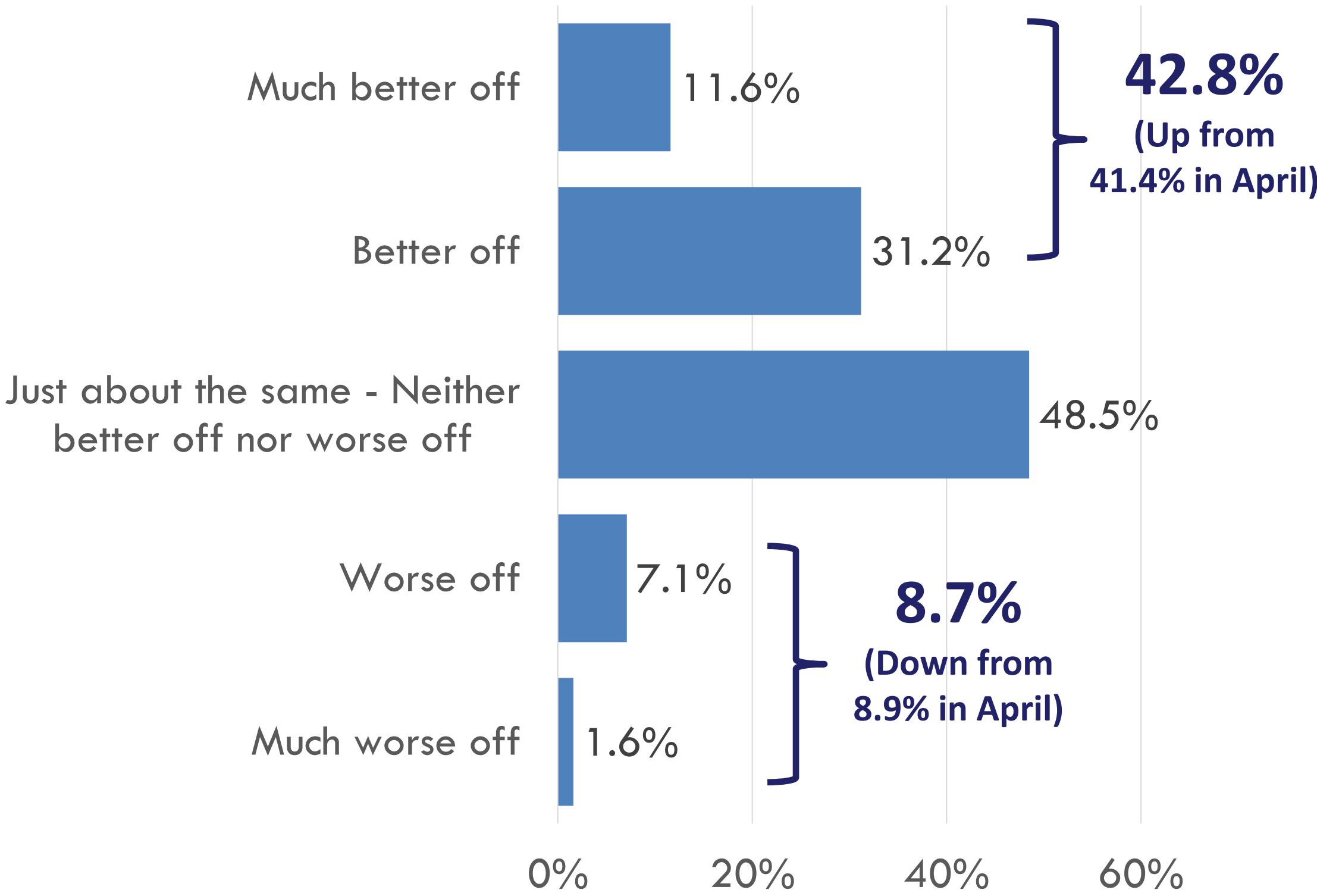
Financial Confidence Of Travelers

HOUSEHOLD FINANCES

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

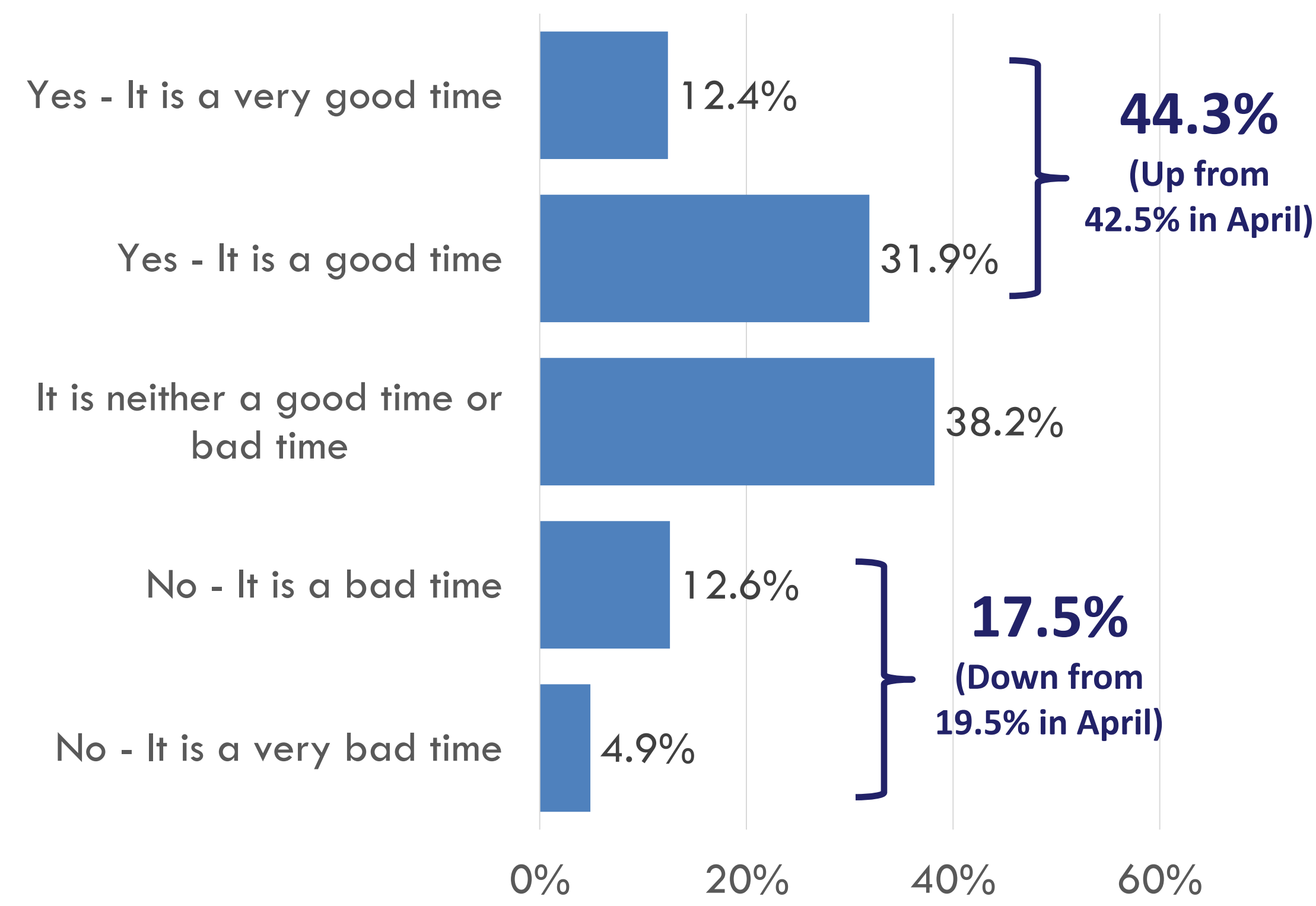


Question: LOOKING FORWARD—do you feel that **a year from now**, you (and your household) will be better off financially, or worse off, or just about the same as now?



HOUSEHOLD FINANCES

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)



TAKEAWAYS

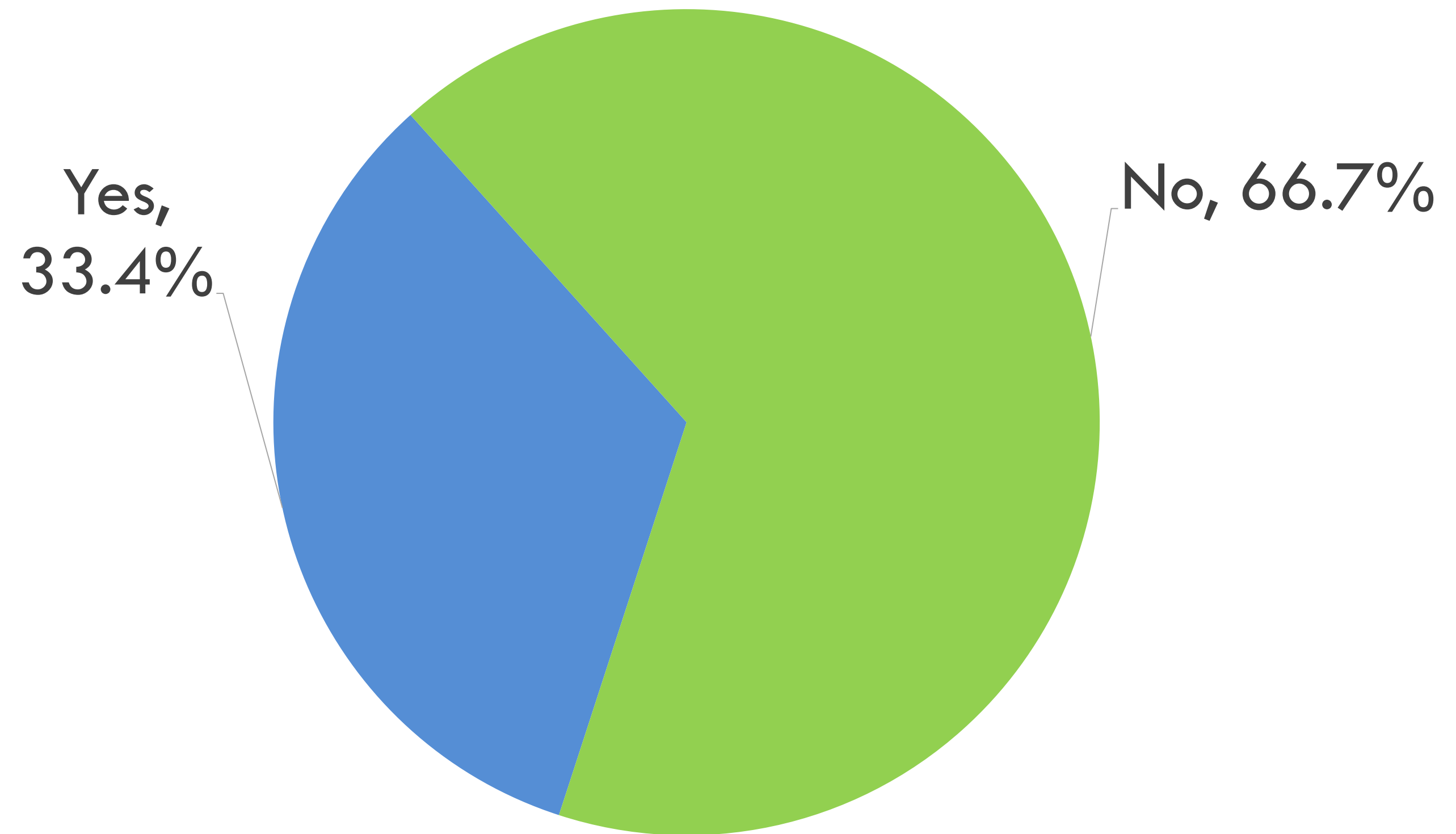
- 1 Traveler expectations for taking more leisure trips in the next year is at its highest level ever. (Keep in mind this is relative to 2020, a very challenged year.)
- 2 The number of leisure trips travelers report having taken in the past year has improved, but it is still below its historical average.
- 3 The importance of leisure travel in traveler budgets has improved consistently since the summer of 2020.
- 4 The financial situation of American traveling households seem solid, with positive expectations for future earnings.

National Parks Travelers

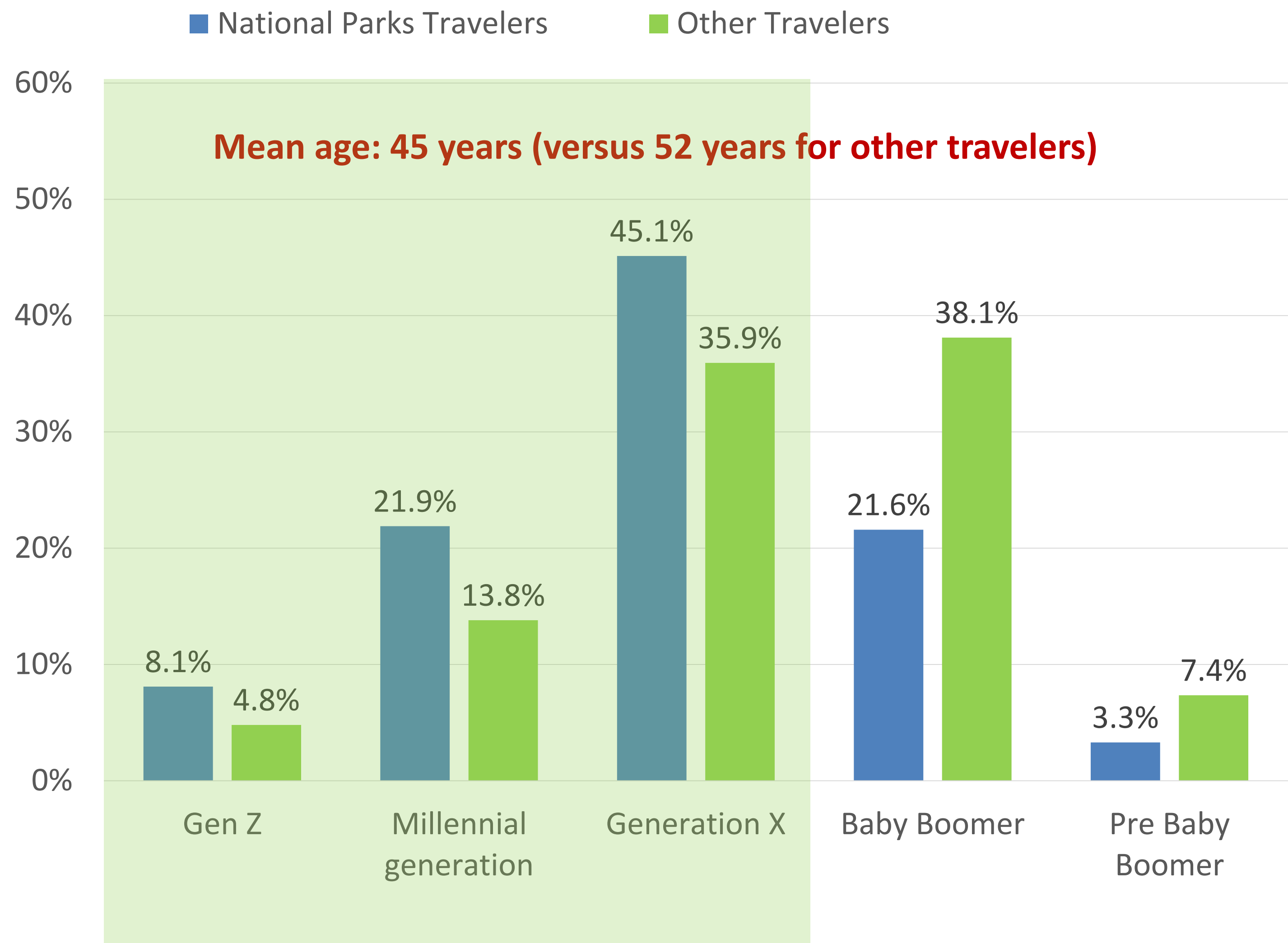


HOW MANY NATIONAL PARKS TRAVELERS ARE THERE?

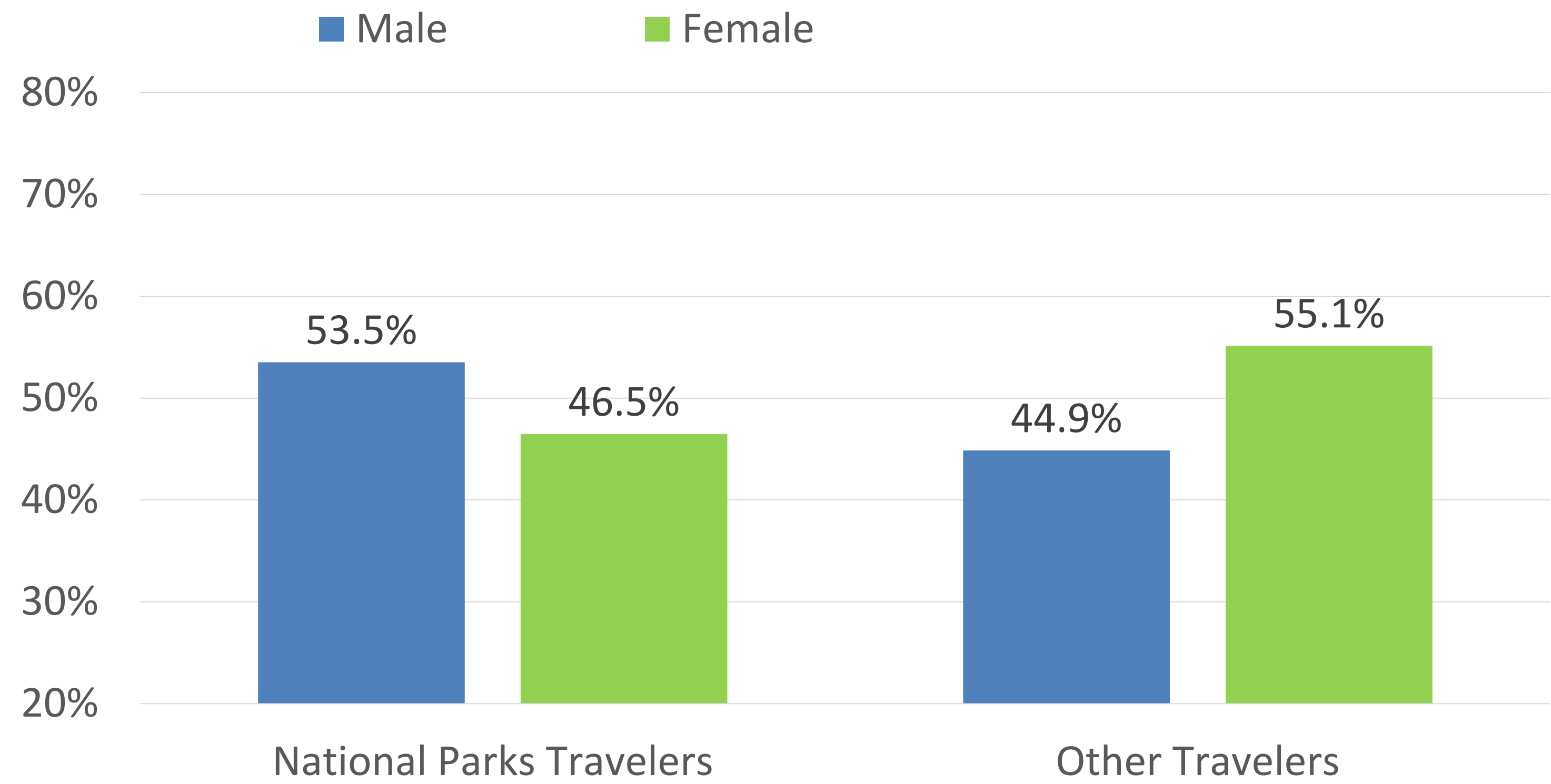
Question: On any of the leisure trip(s) you took in the past year, did you VISIT A NATIONAL PARK OR MONUMENT?



National Parks
Travelers are
generally younger

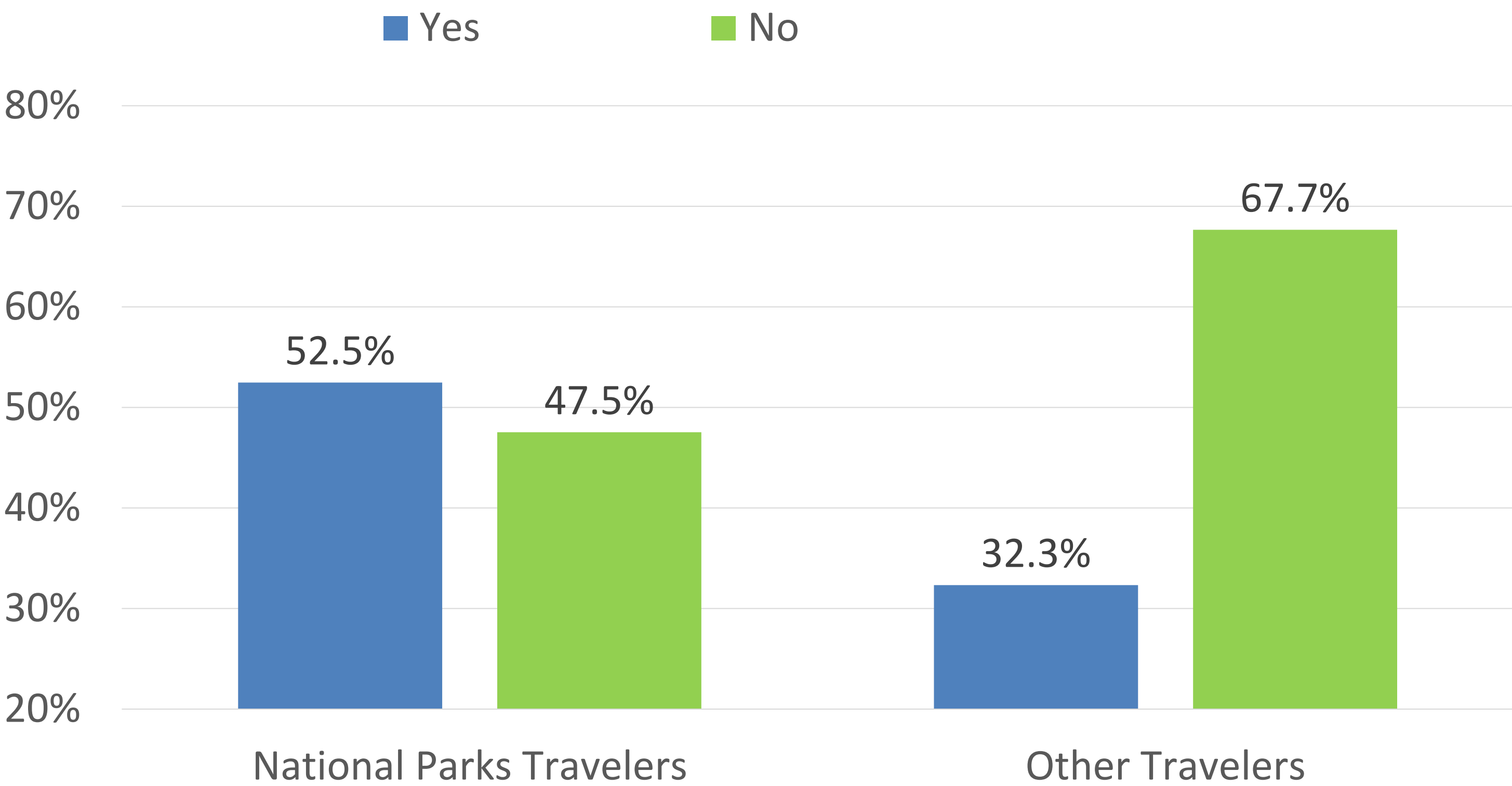


National Parks
Travelers skew
male



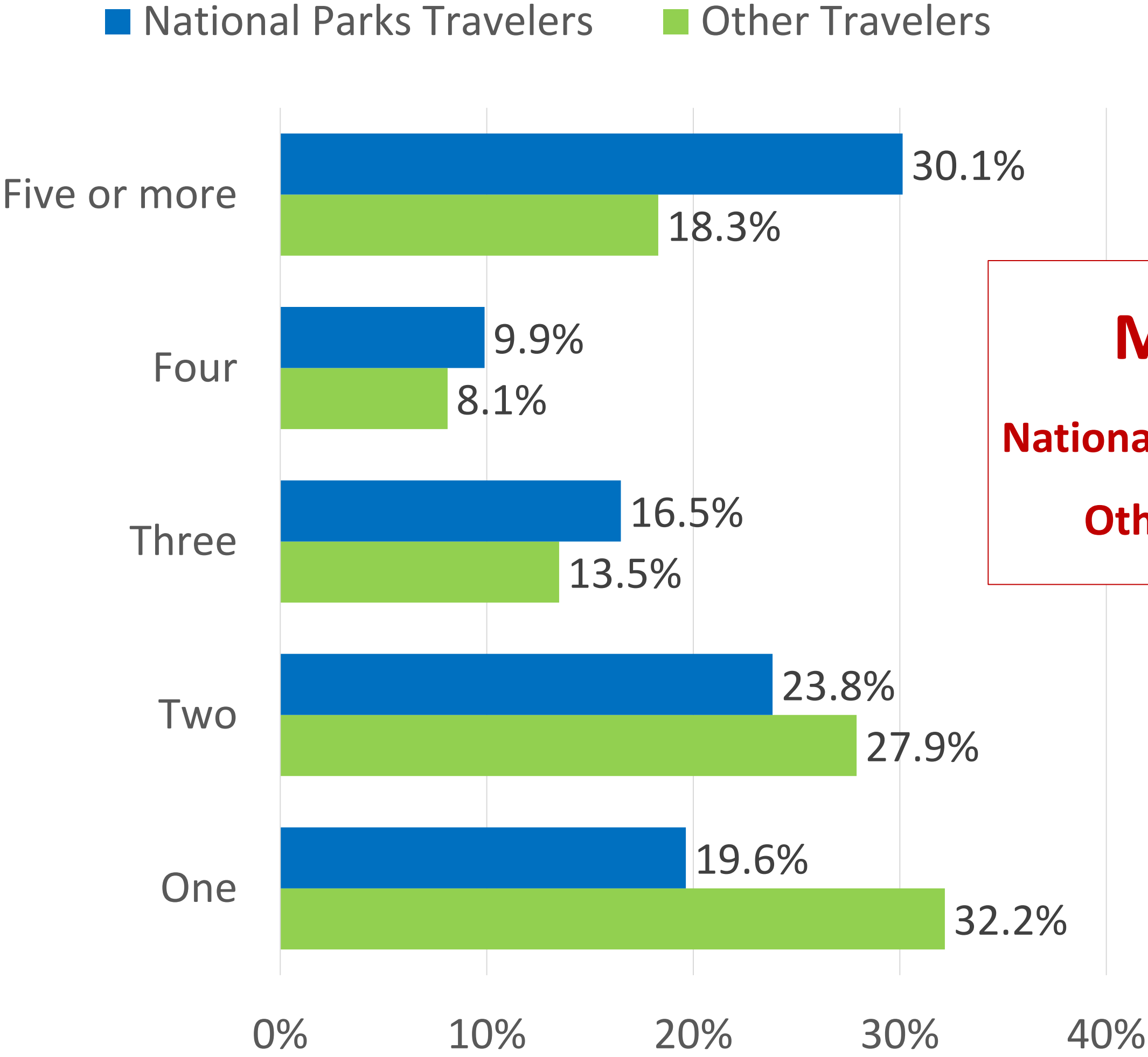
TRAVELS WITH CHILDREN

Question: On any of the leisure trip(s) you took last year, did you bring your own children?



LEISURE TRIPS TAKEN IN PAST 12 MONTHS

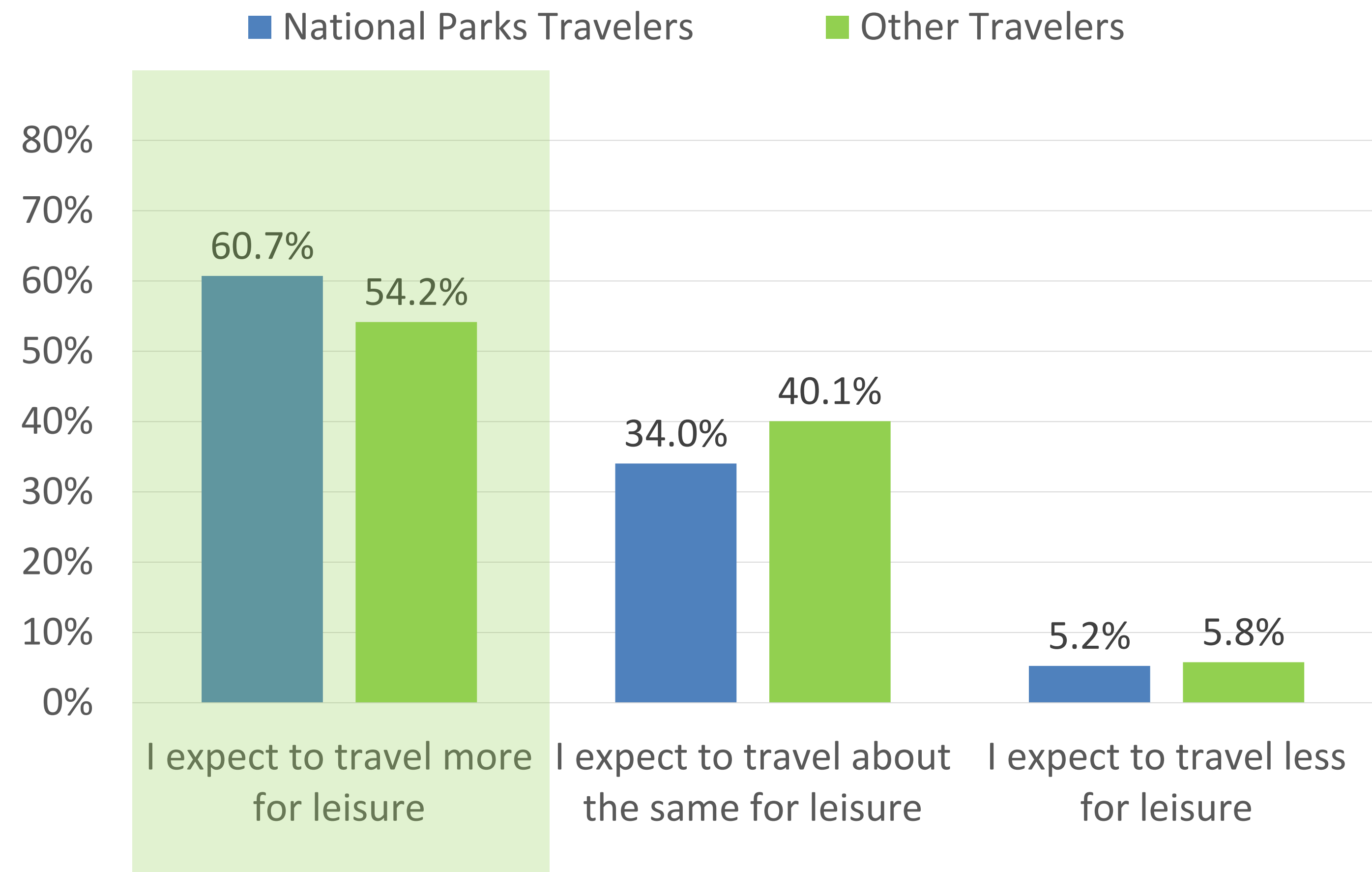
National Parks
Travelers travel
more



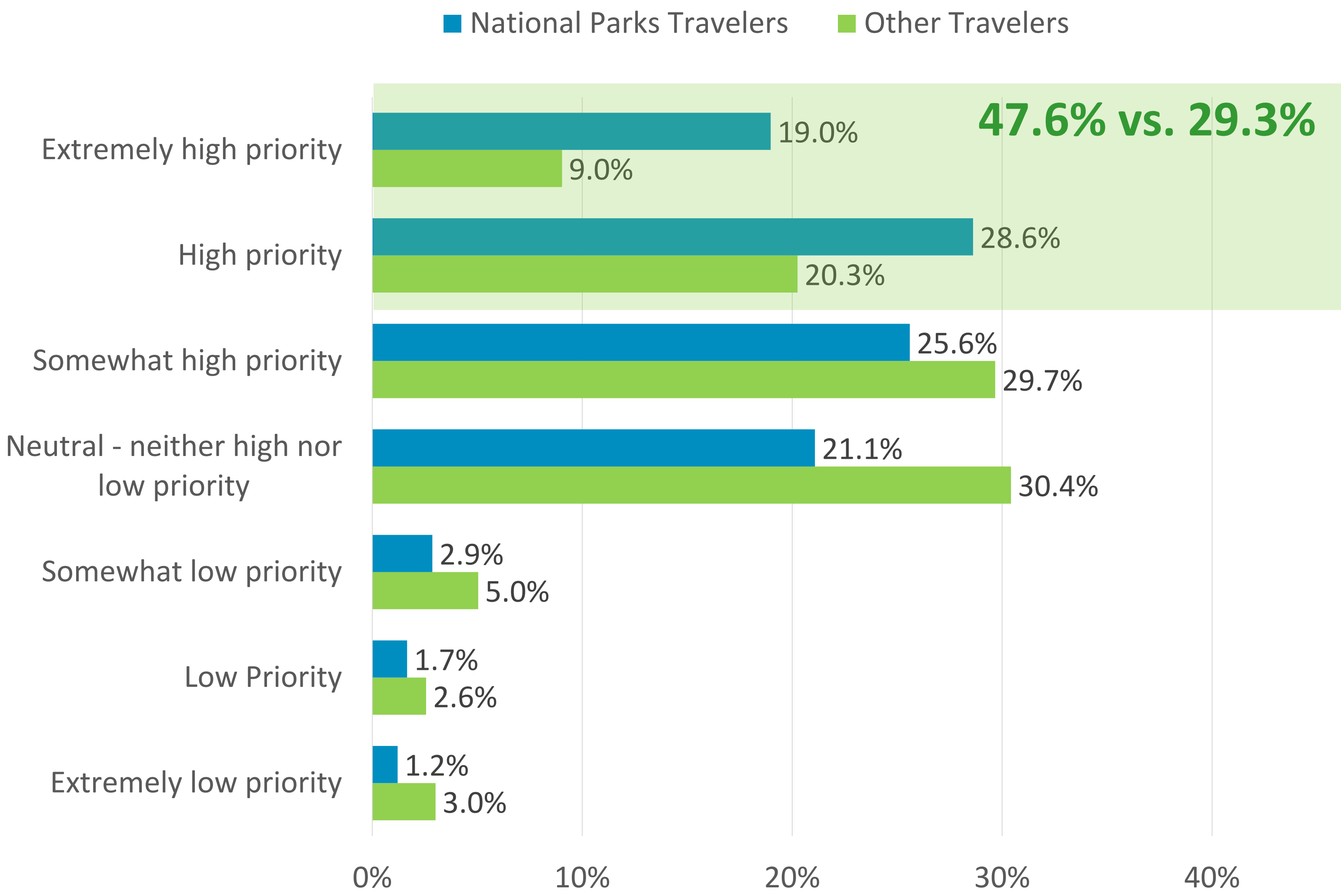
Mean Trips:
National Parks Travelers = 4.5
Other Travelers = 3.3

NATIONAL PARKS TRAVELERS ARE READY TO TRAVEL & SPEND

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?



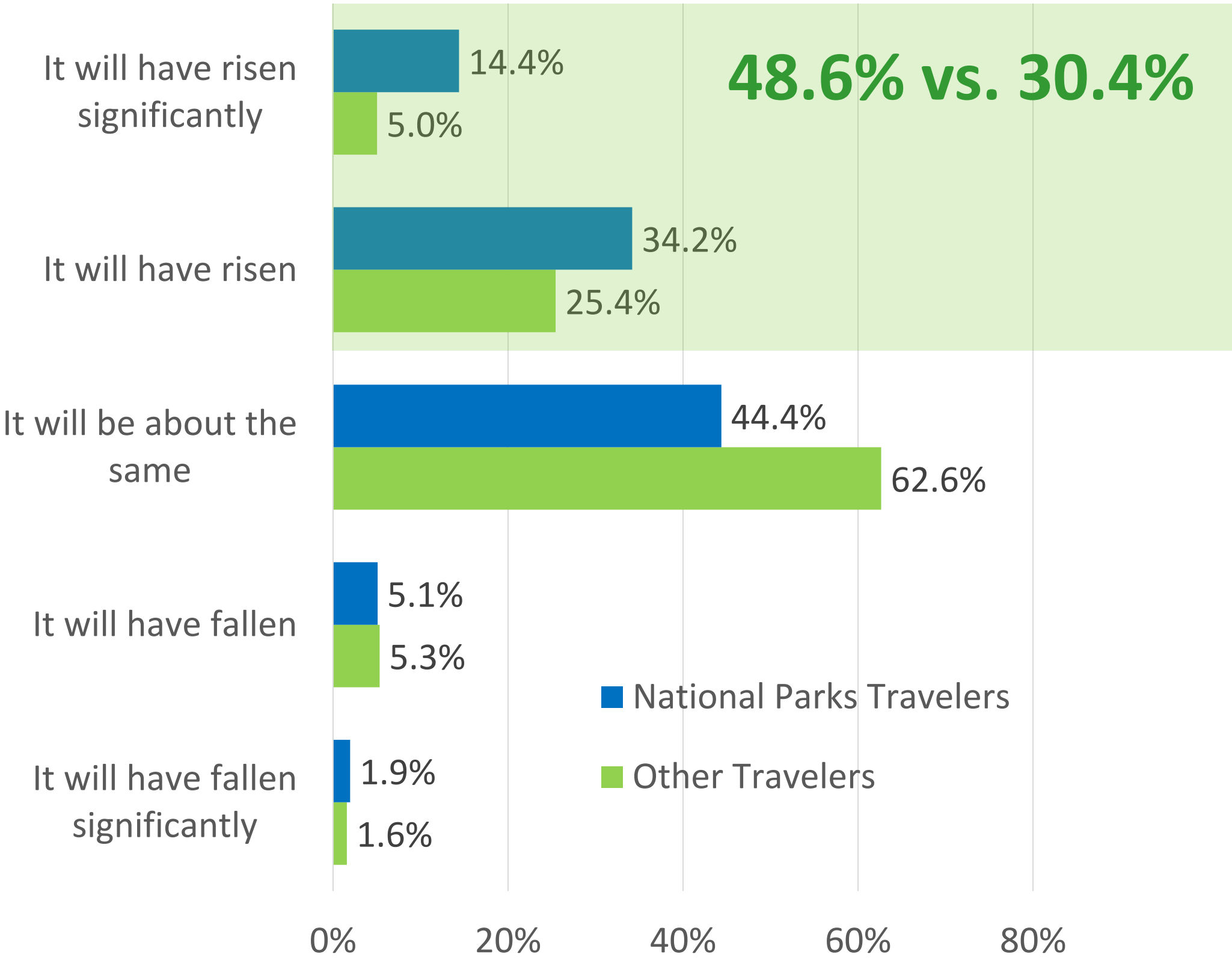
NATIONAL PARKS TRAVELERS: READY TO TRAVEL & SPEND



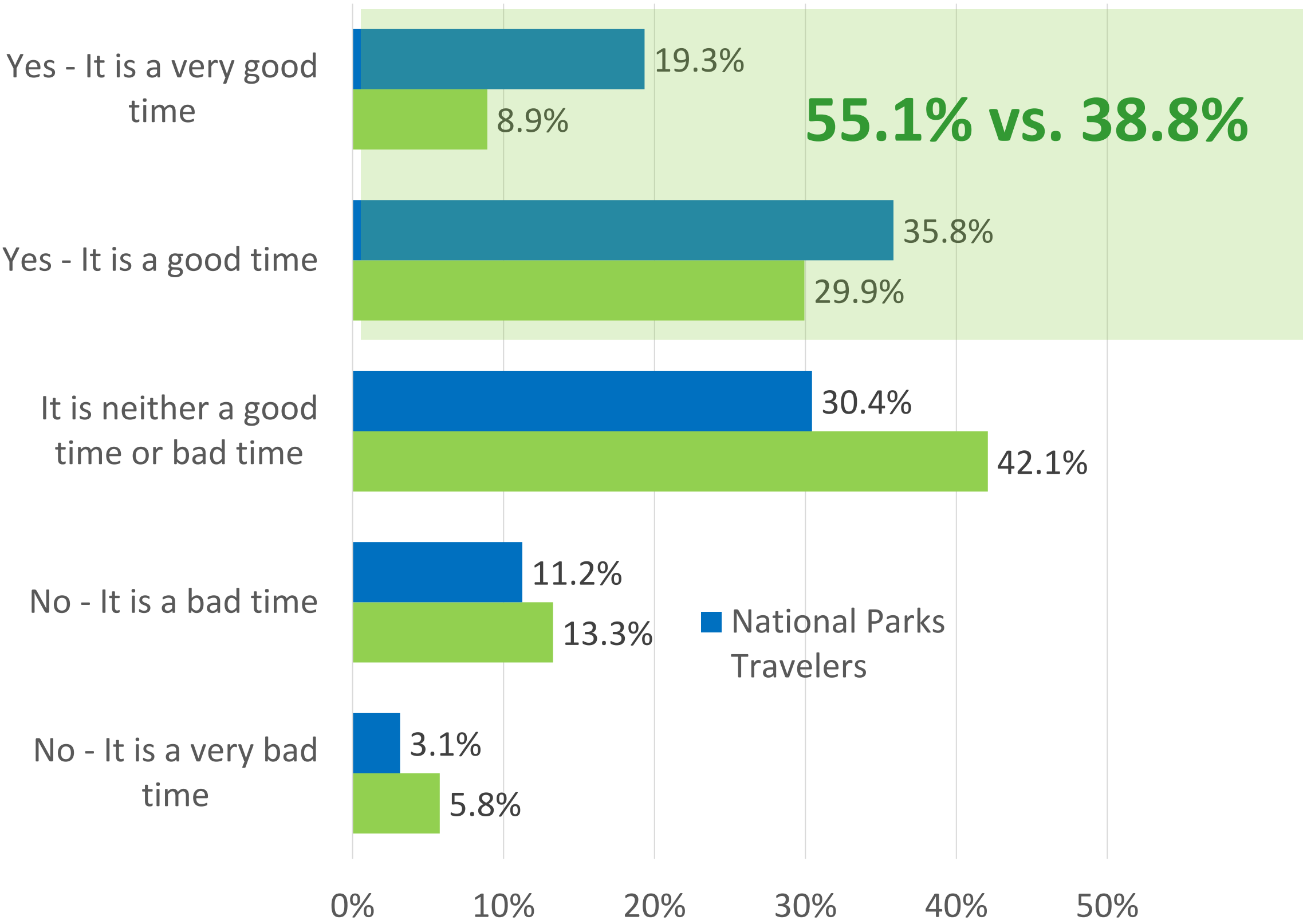
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NATIONAL PARKS TRAVELERS: READY TO TRAVEL & SPEND

Question: LOOKING FORWARD—do you feel that six months from now your total family income will have risen or fallen or stayed about the same

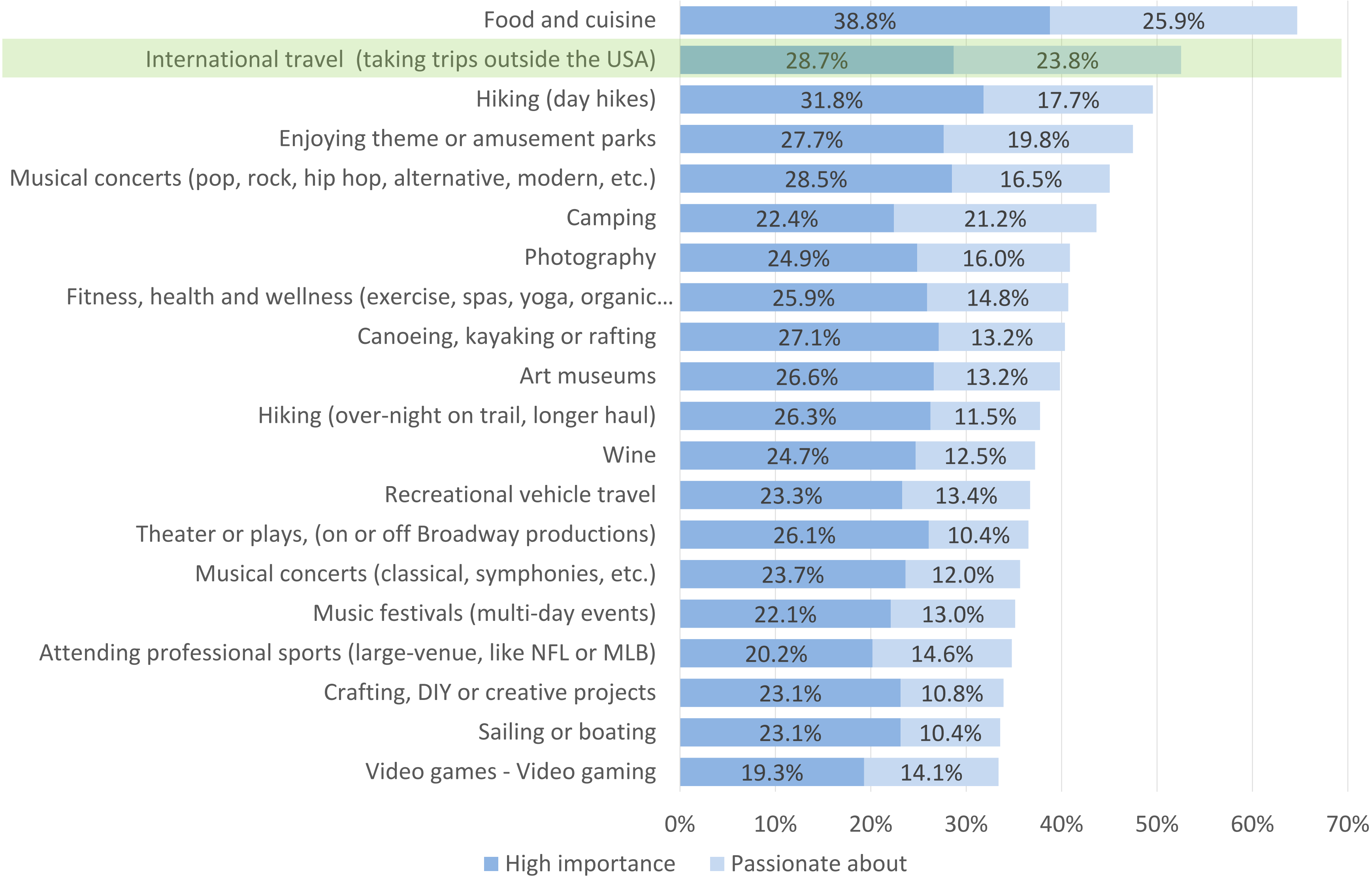


Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



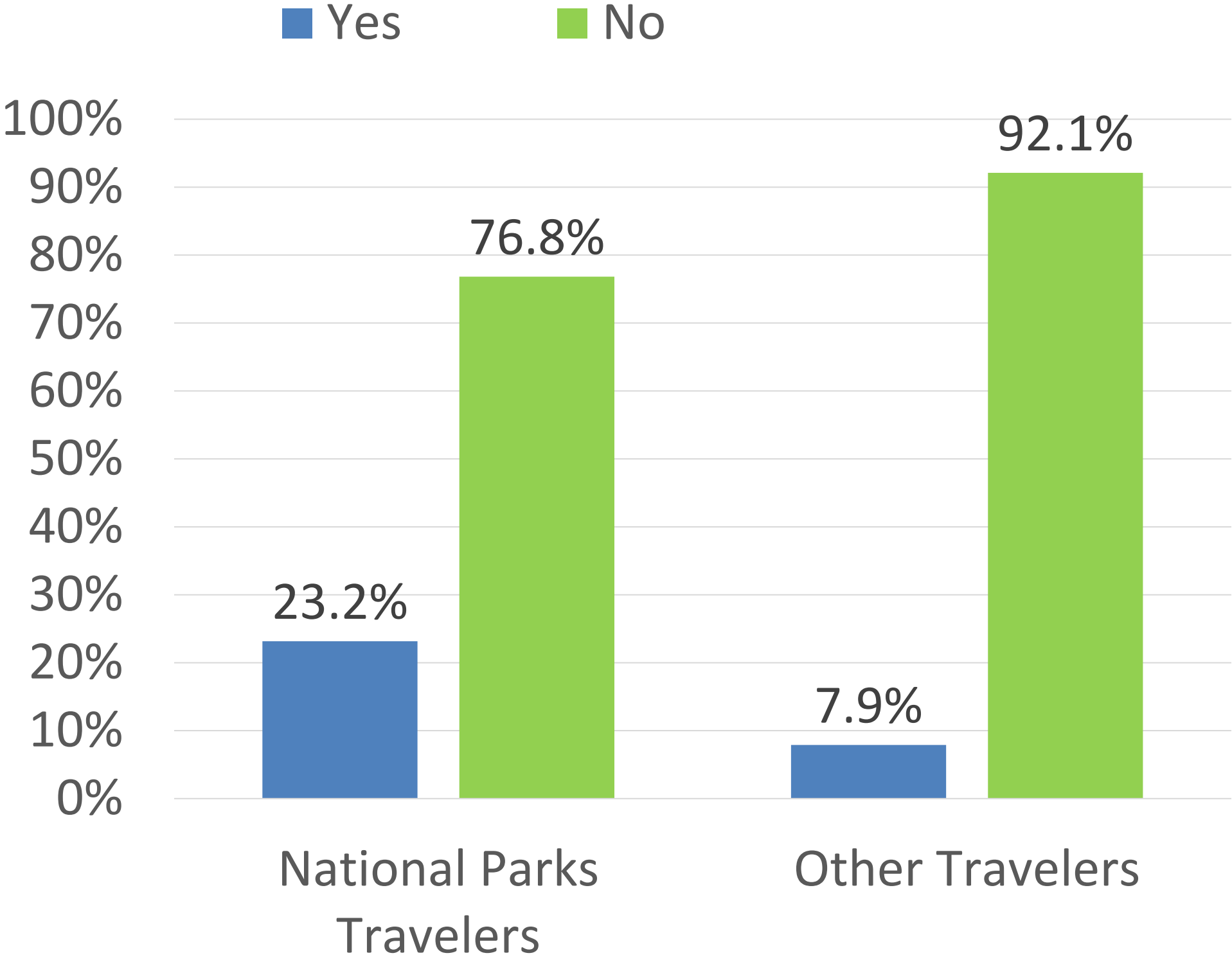
NATIONAL PARKS TRAVELERS: TRAVEL PASSIONS

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

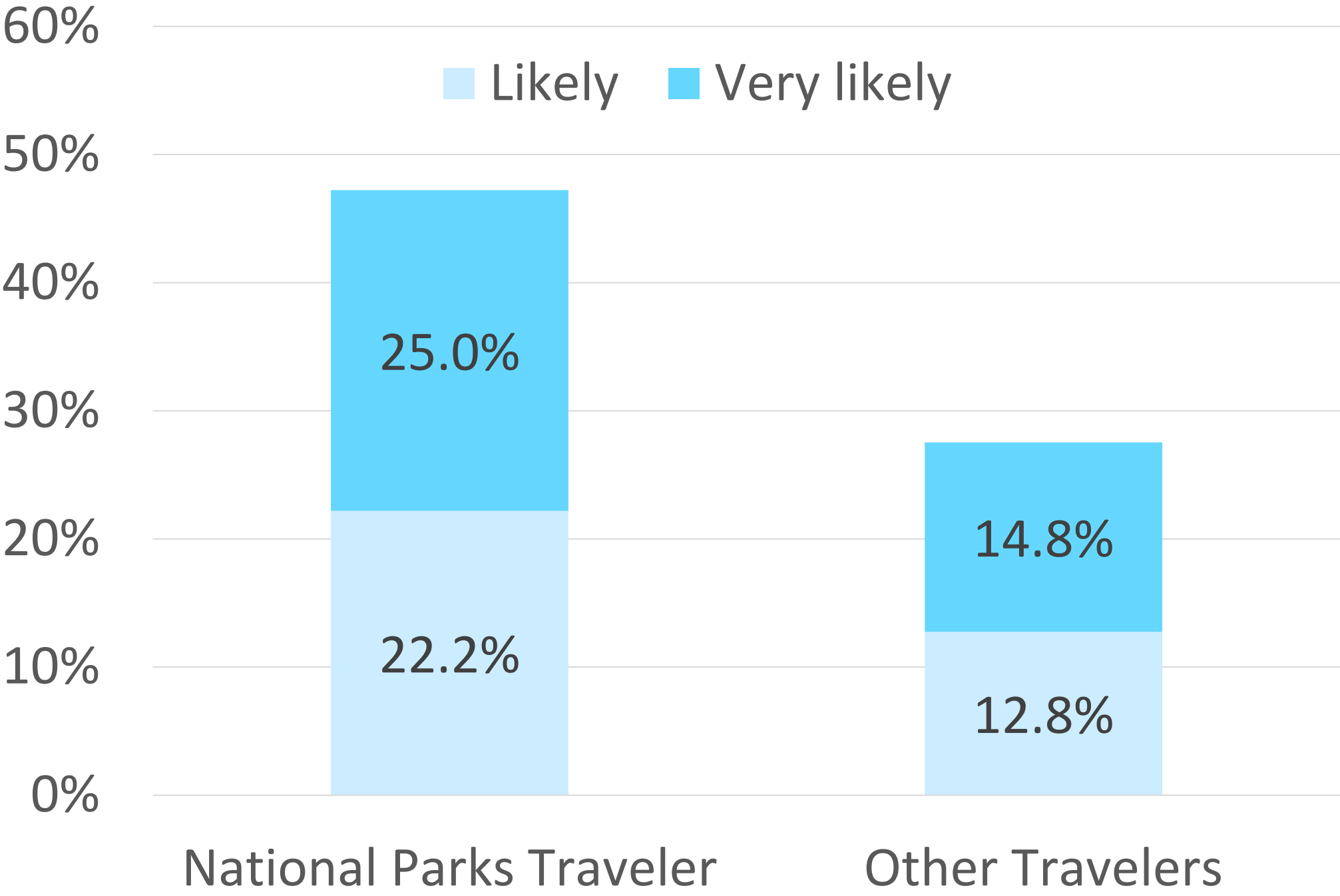


NATIONAL PARKS TRAVELERS: INTERNATIONAL TRAVEL

Past 12 Months

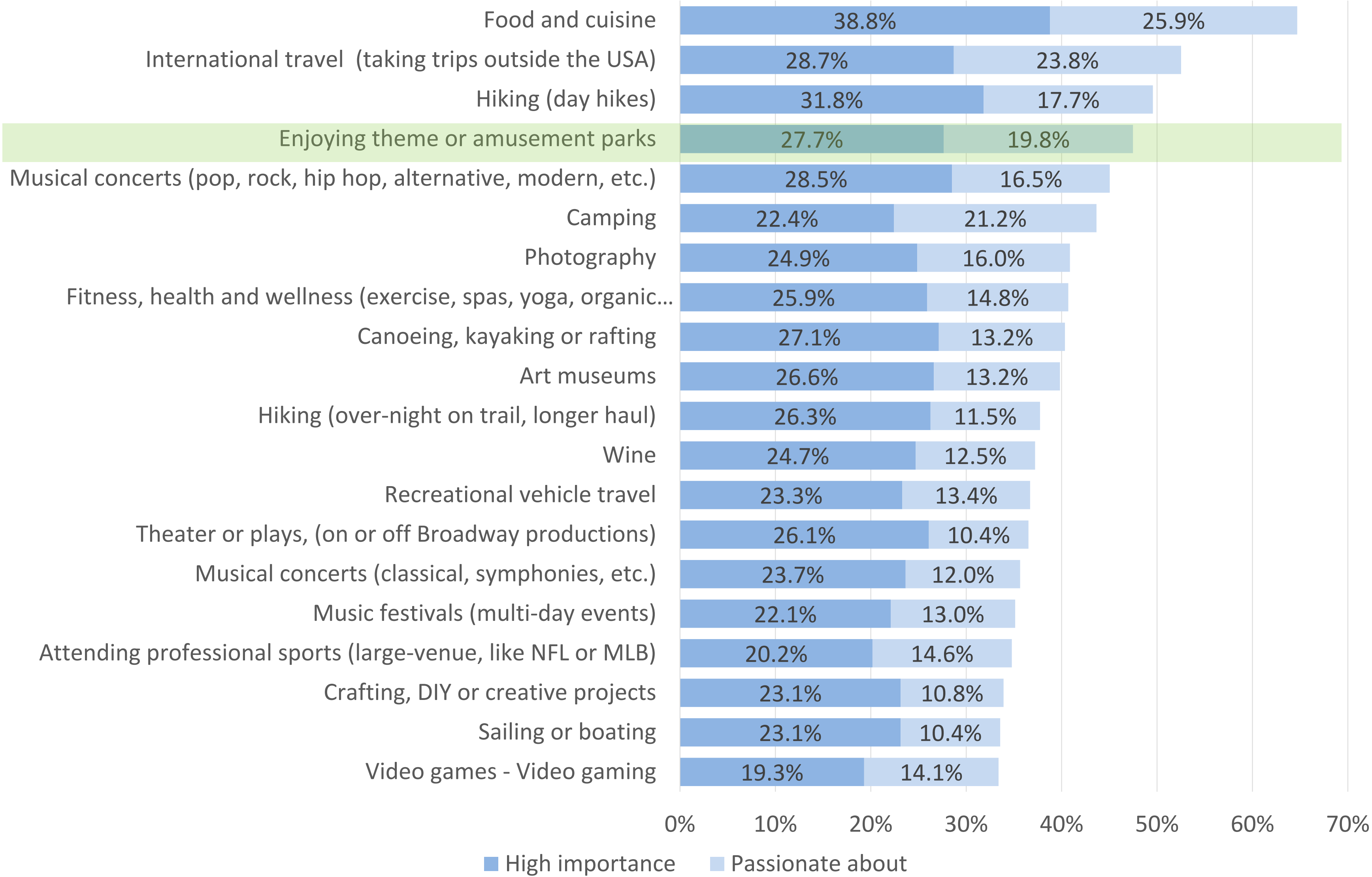


Next 12 Months



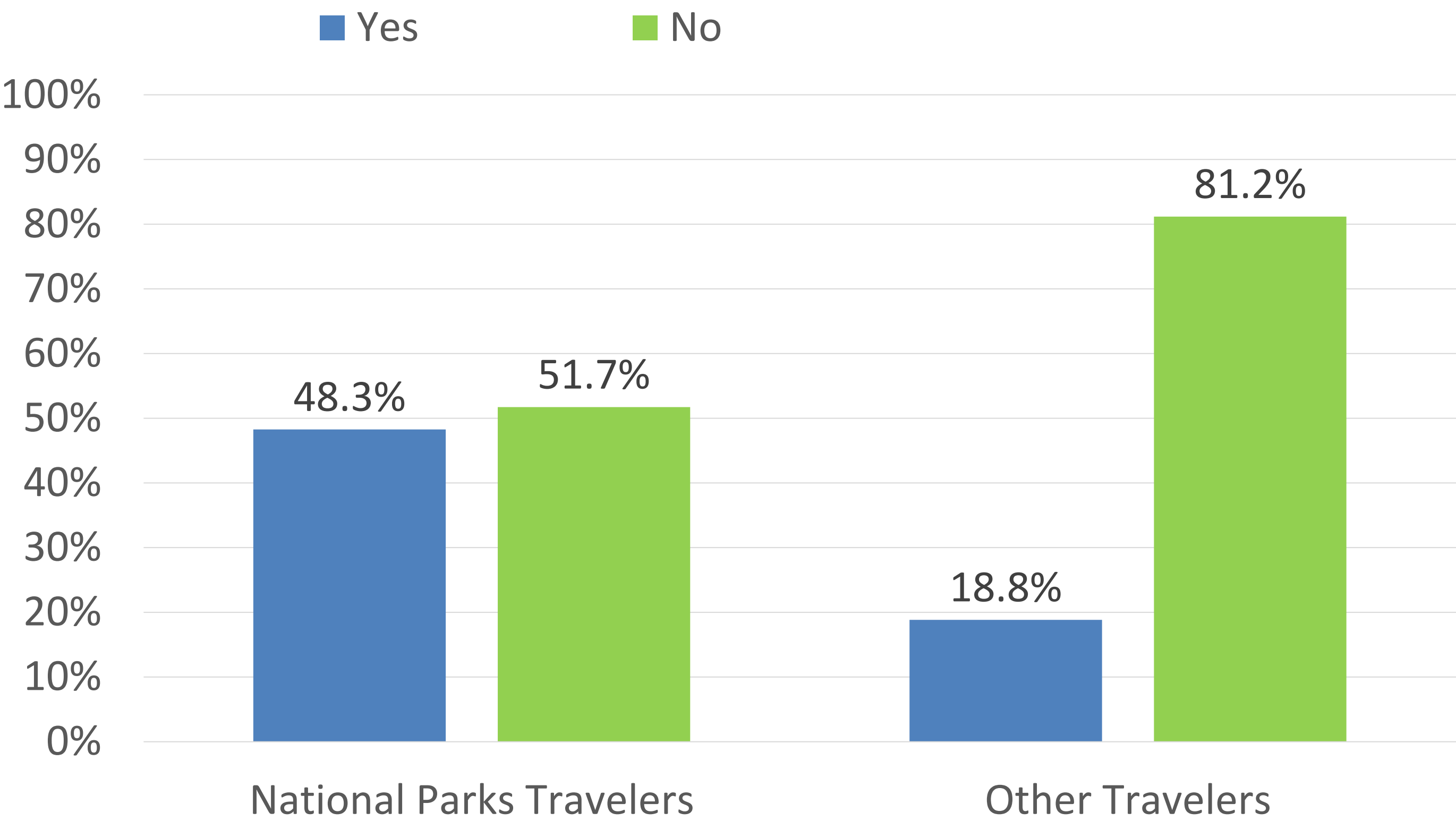
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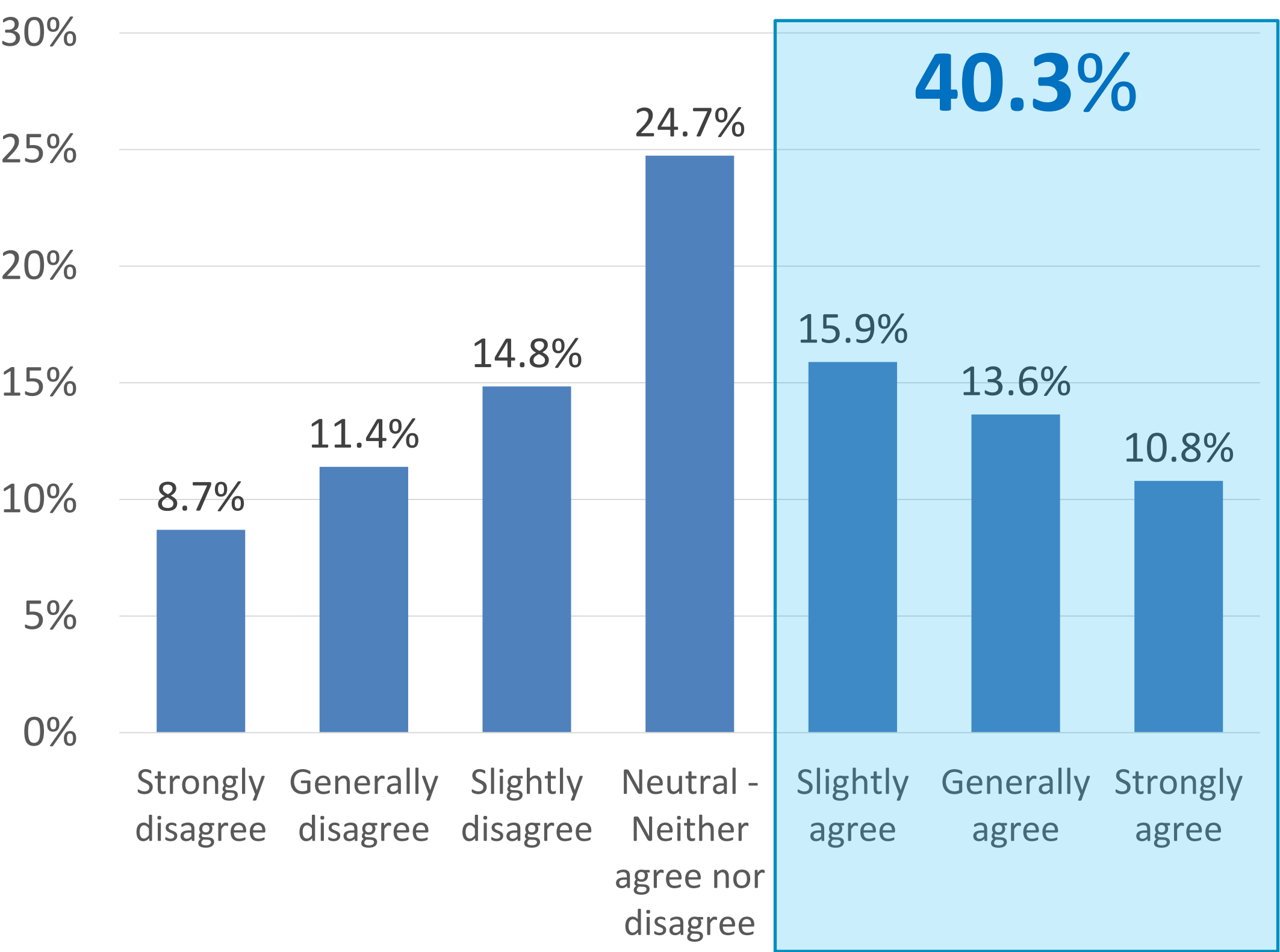
THEME OR AMUSEMENT PARKS (PAST 12 YEARS)

Question: On any of the leisure trip(s) you took in the past year, did you VISIT ANY THEME OR AMUSEMENT PARKS?

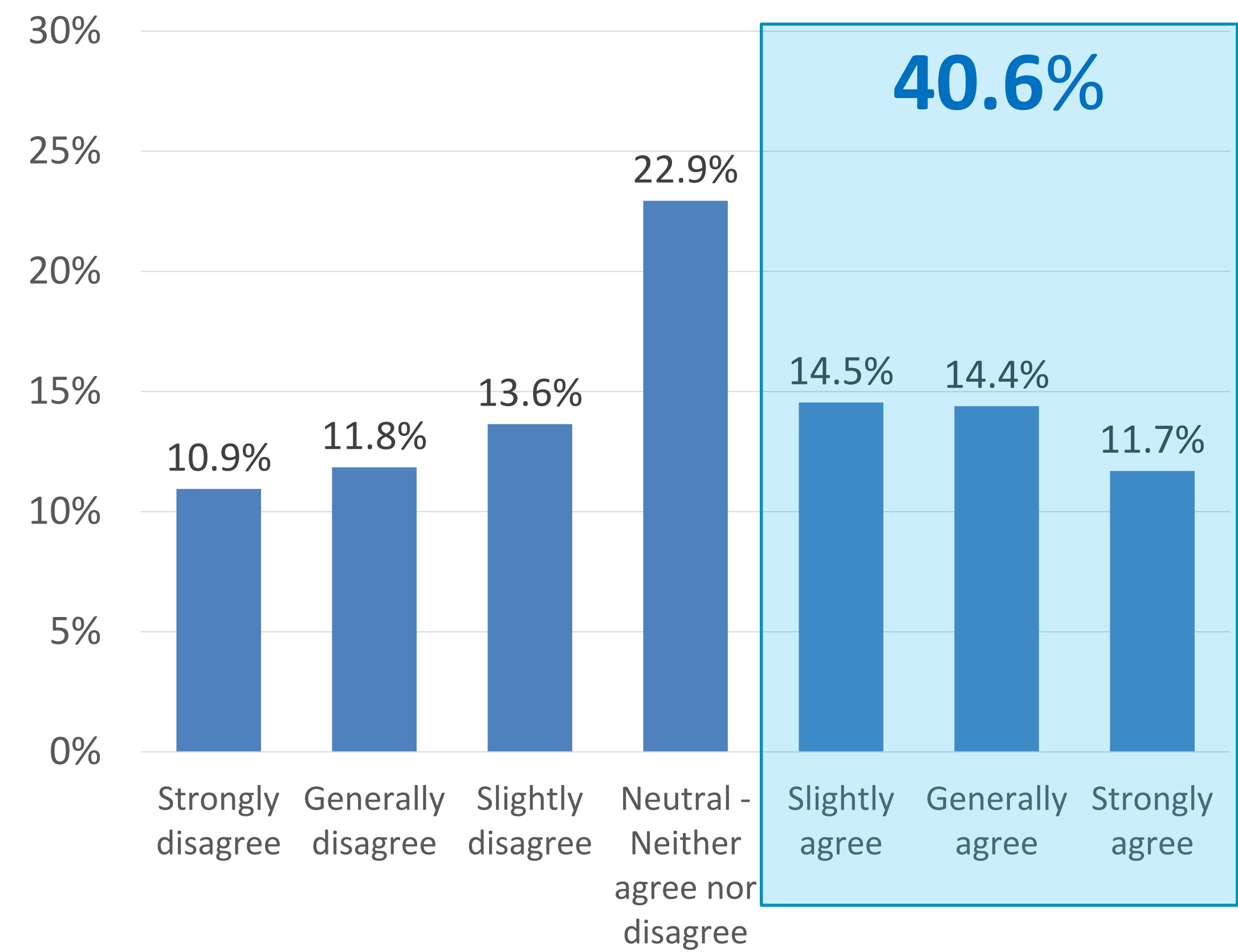


NATIONAL PARKS TRAVELERS: VARIED DESTINATION PREFERENCES

I do not like spending my vacation time in cities

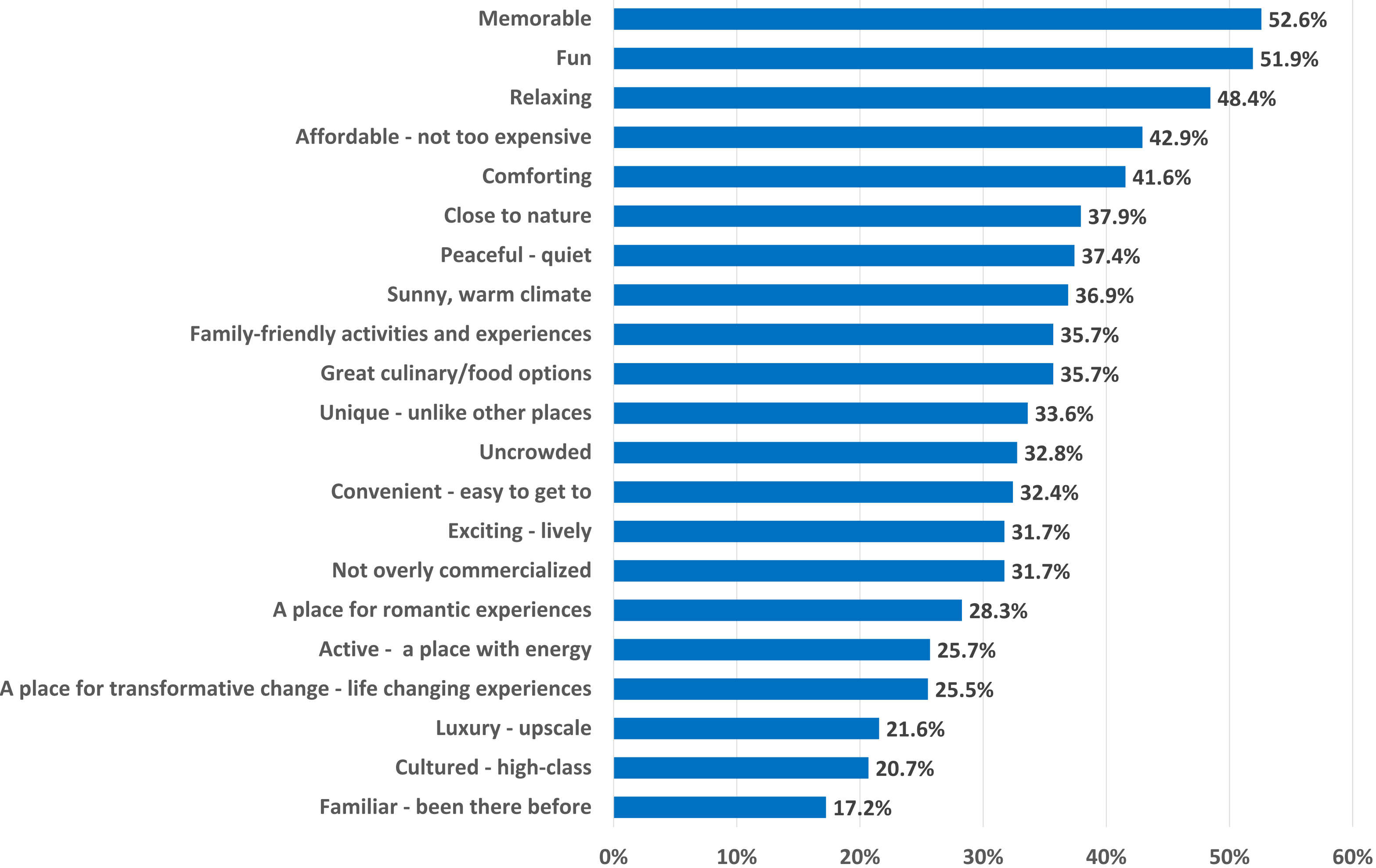


I prefer visiting large cities to rural travel experiences (beach resorts, National or State Parks, smaller towns, scenic byways, etc.)



NATIONAL PARKS TRAVELERS: WHAT THEY'RE LOOKING FOR

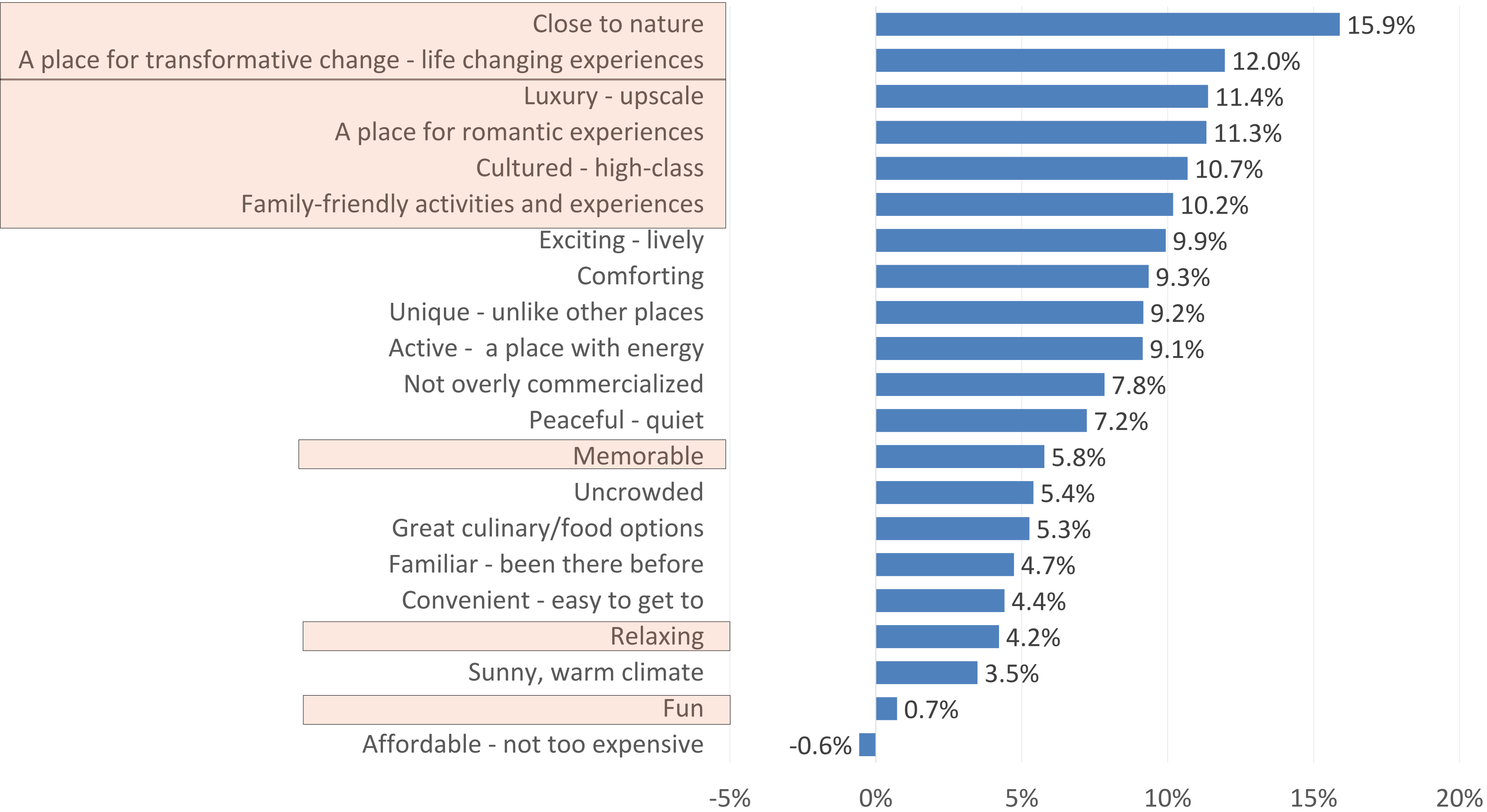
Question: Please tell us how you want the places you visit to be. How important is each attribute?



NATIONAL PARKS TRAVELERS: WHAT THEY'RE LOOKING FOR

(Absolute % difference National Parks Travelers vs. Other Travelers)

Question: Please tell us how you want the places you visit to be. How important is each attribute?



TAKEAWAYS

- 1** National Parks Travelers represent about one third of the traveling public, and tend to be younger, male and persons who travel with children.
- 2** They take more leisure trips than other travelers (4.5 vs. 3.3 annually.) They're extremely optimistic about increasing their travels in the next 12 months.
- 3** National Parks Travelers are typically doing well financially, with high expectations for their prospects in the upcoming year.
- 4** Beyond park experiences, National Parks Travelers tend to be into food and cuisine, theme parks and music concerts. Urban travel experiences are also popular with National Parks visitors.



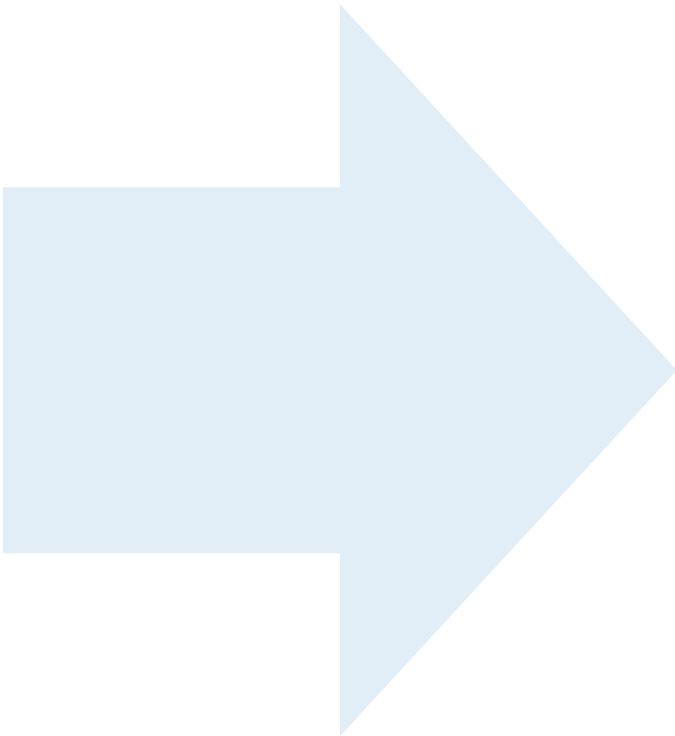
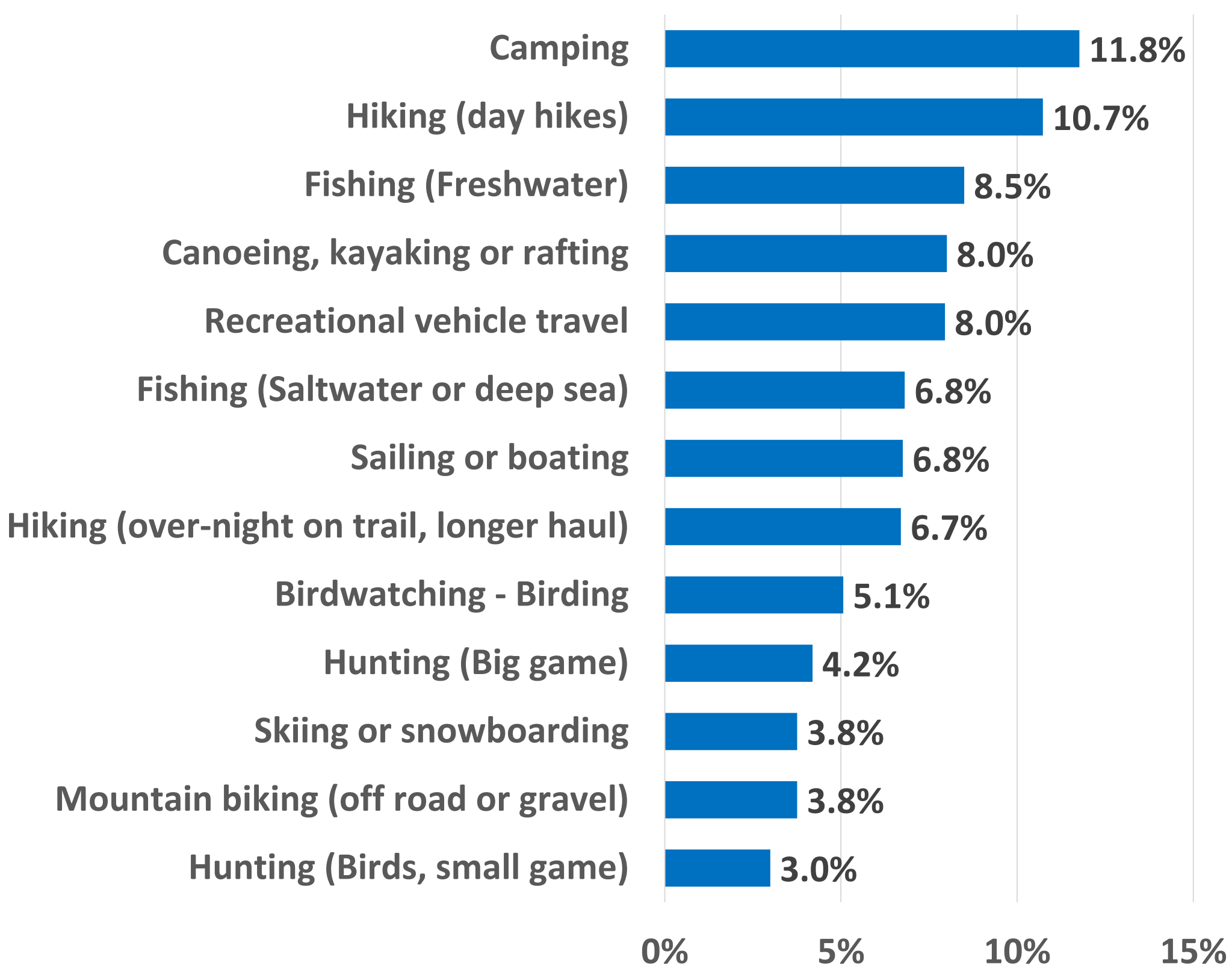
Outdoor Enthusiasts

**Travelers who
have a passion
for any of these
activities**

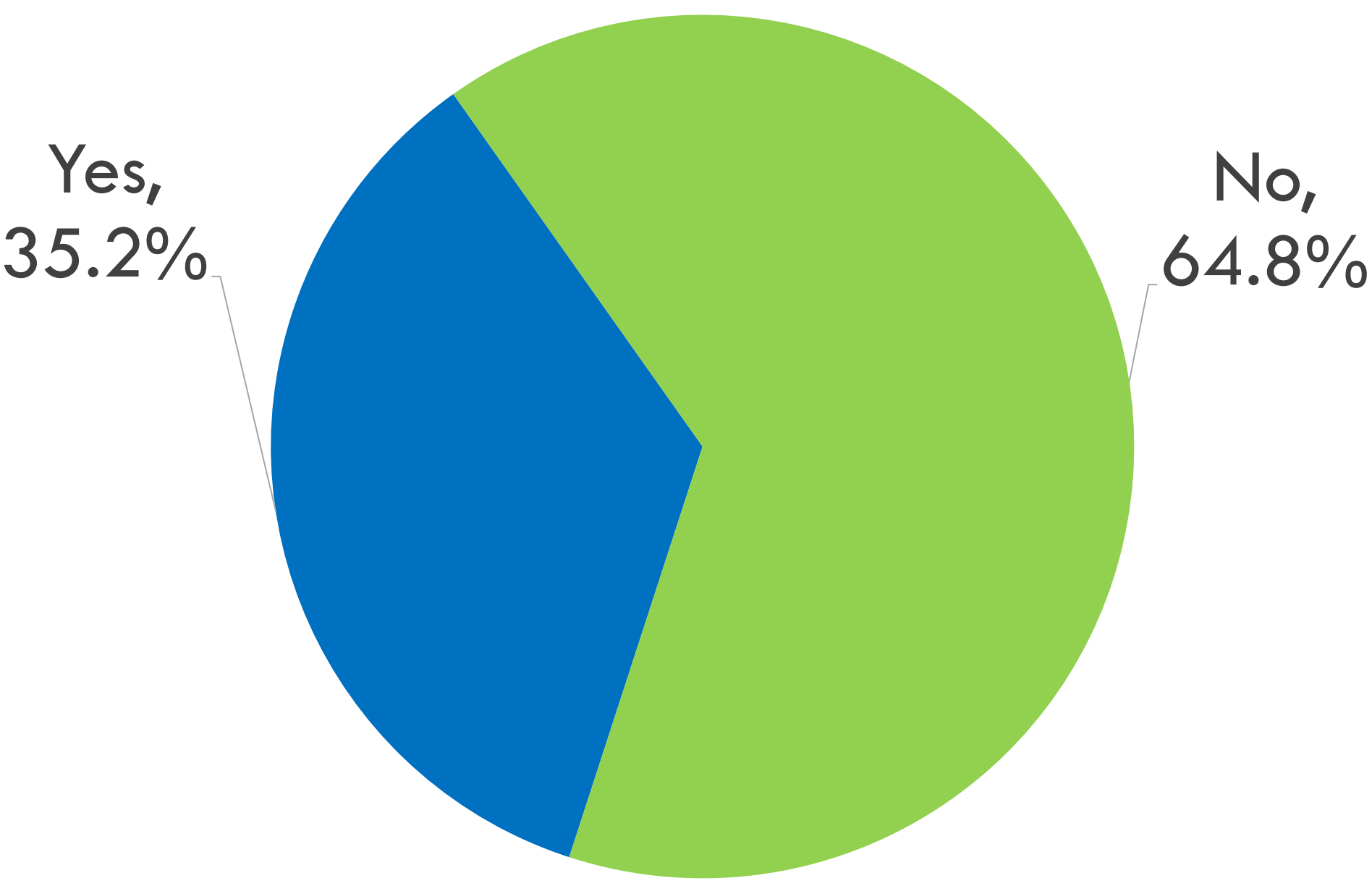
- Mountain biking (off road or gravel)
- Hunting (Big game)
- Hunting (Birds, small game)
- Hiking (day hikes)
- Hiking (over-night on trail, longer haul)
- Camping
- Recreational vehicle travel
- Sailing or boating
- Canoeing, kayaking or rafting
- Fishing (Freshwater)
- Fishing (Saltwater or deep sea)
- Skiing or snowboarding
- Birdwatching - Birding

SIZE OF THE MARKET: OUTDOOR ENTHUSIASTS

% of all travelers passionate about individual outdoor activities

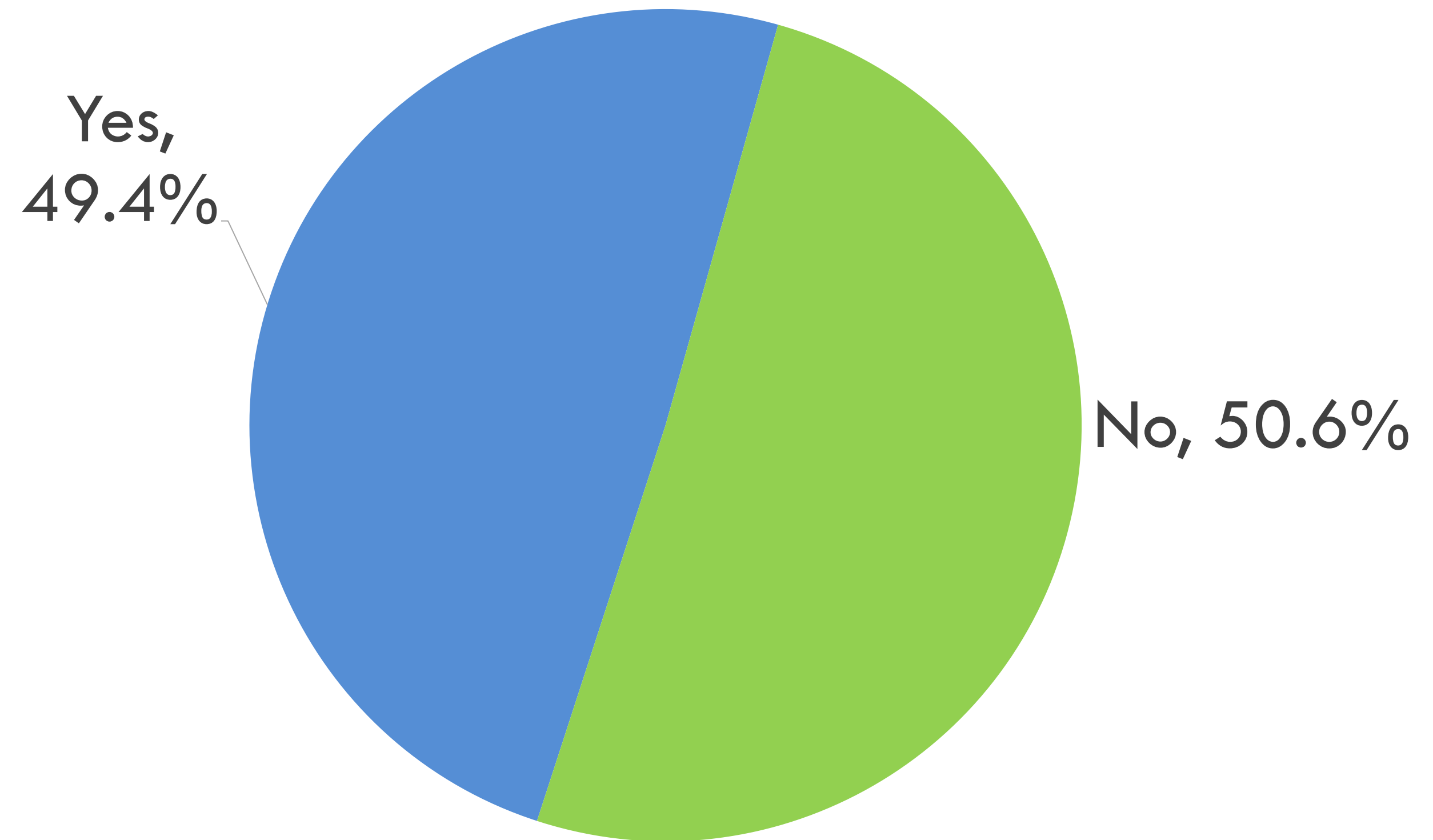


Outdoor Enthusiasts: Travelers passionate about outdoor activities

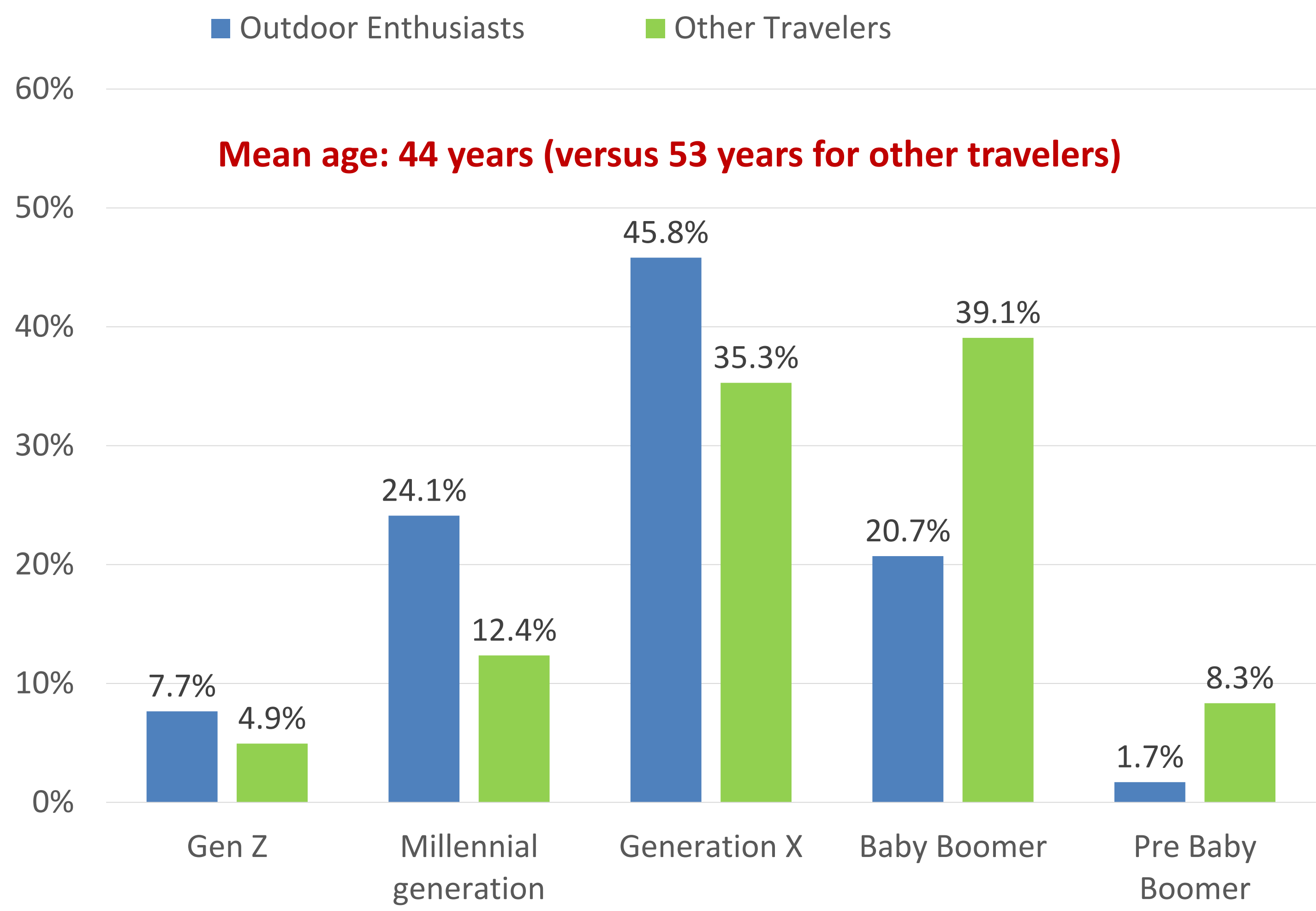


HALF ARE NATIONAL PARKS TRAVELERS

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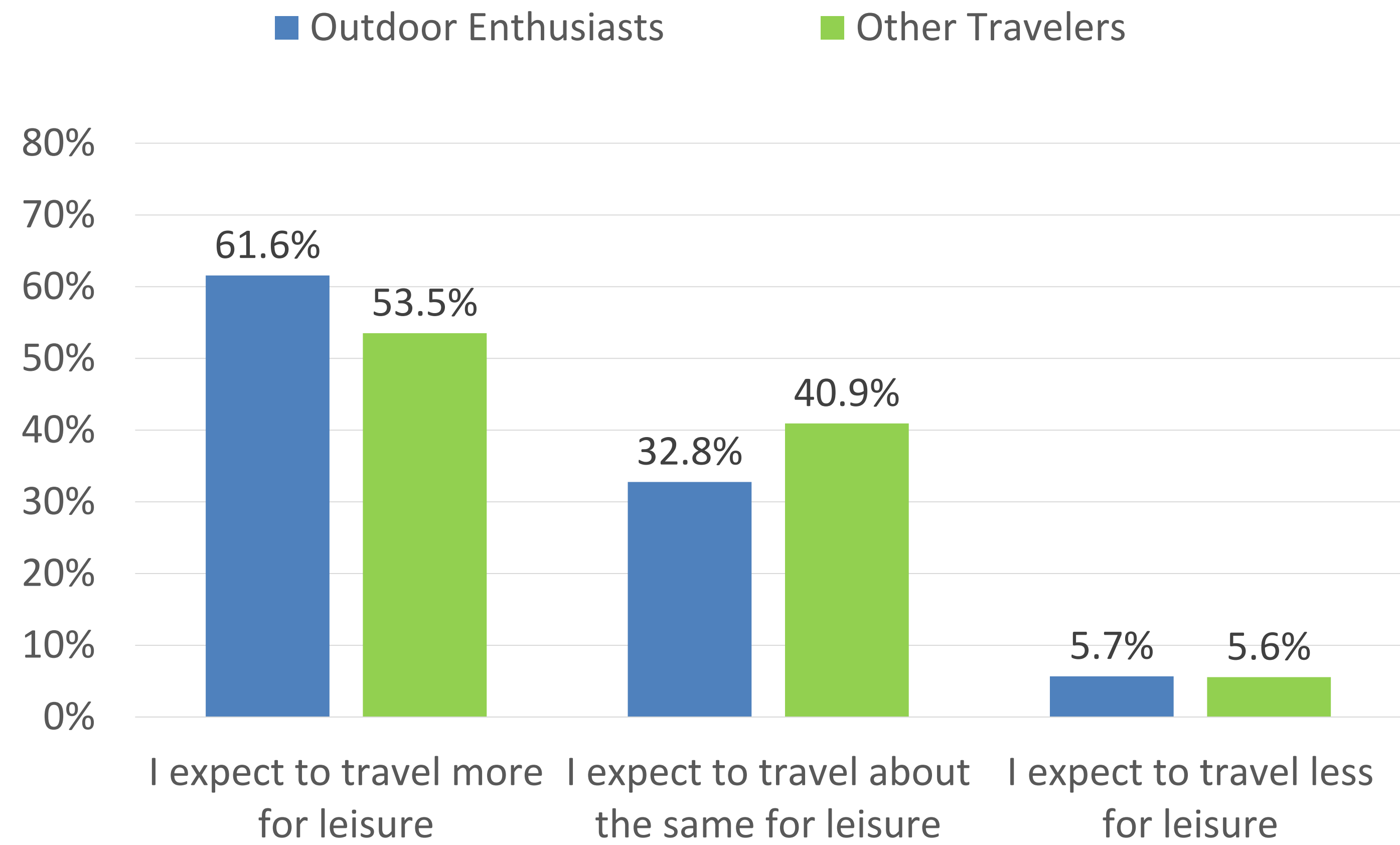


Outdoor
Enthusiasts are
also younger
travelers

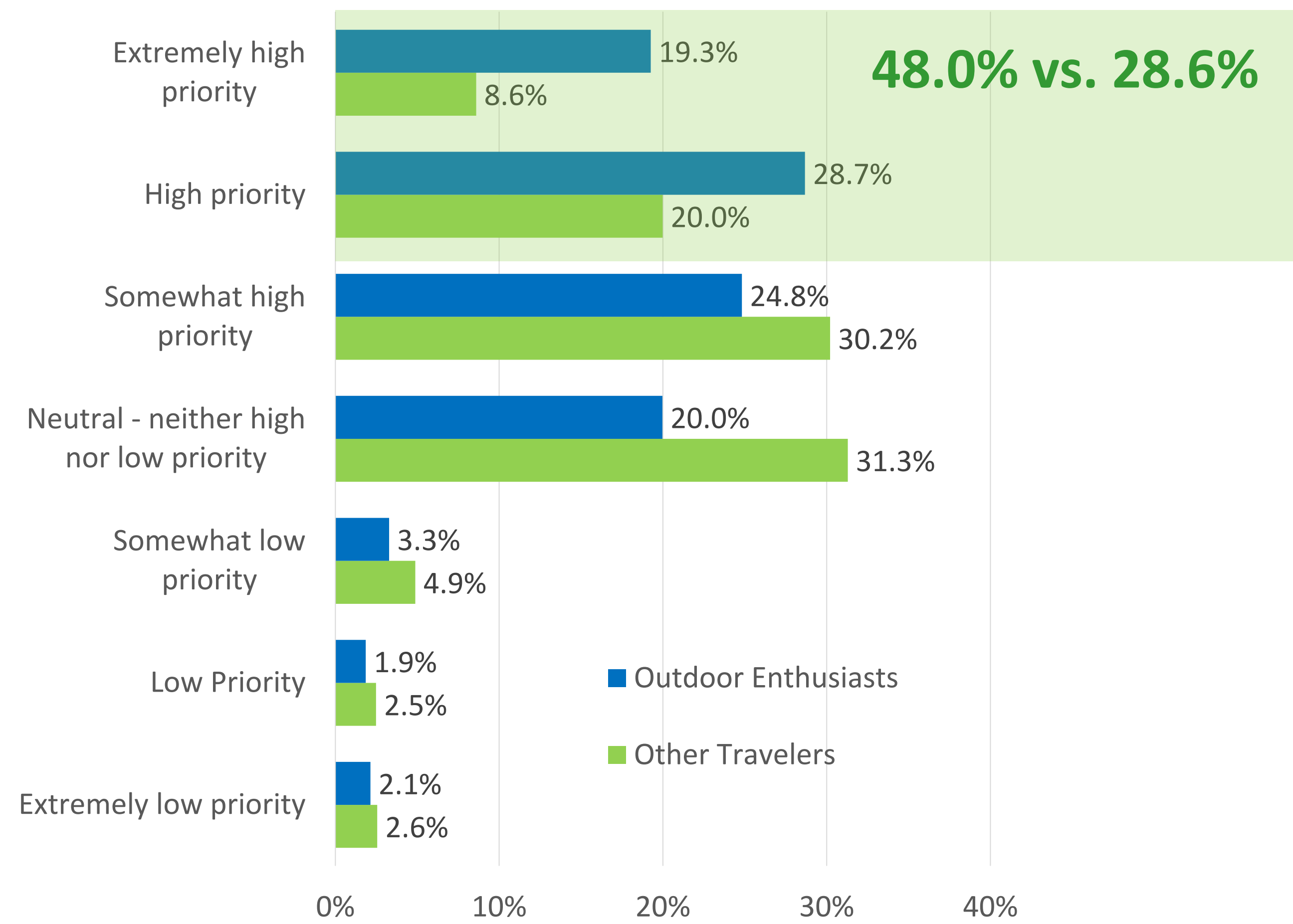


OUTDOOR ENTHUSIASTS ARE READY TO TRAVEL & SPEND

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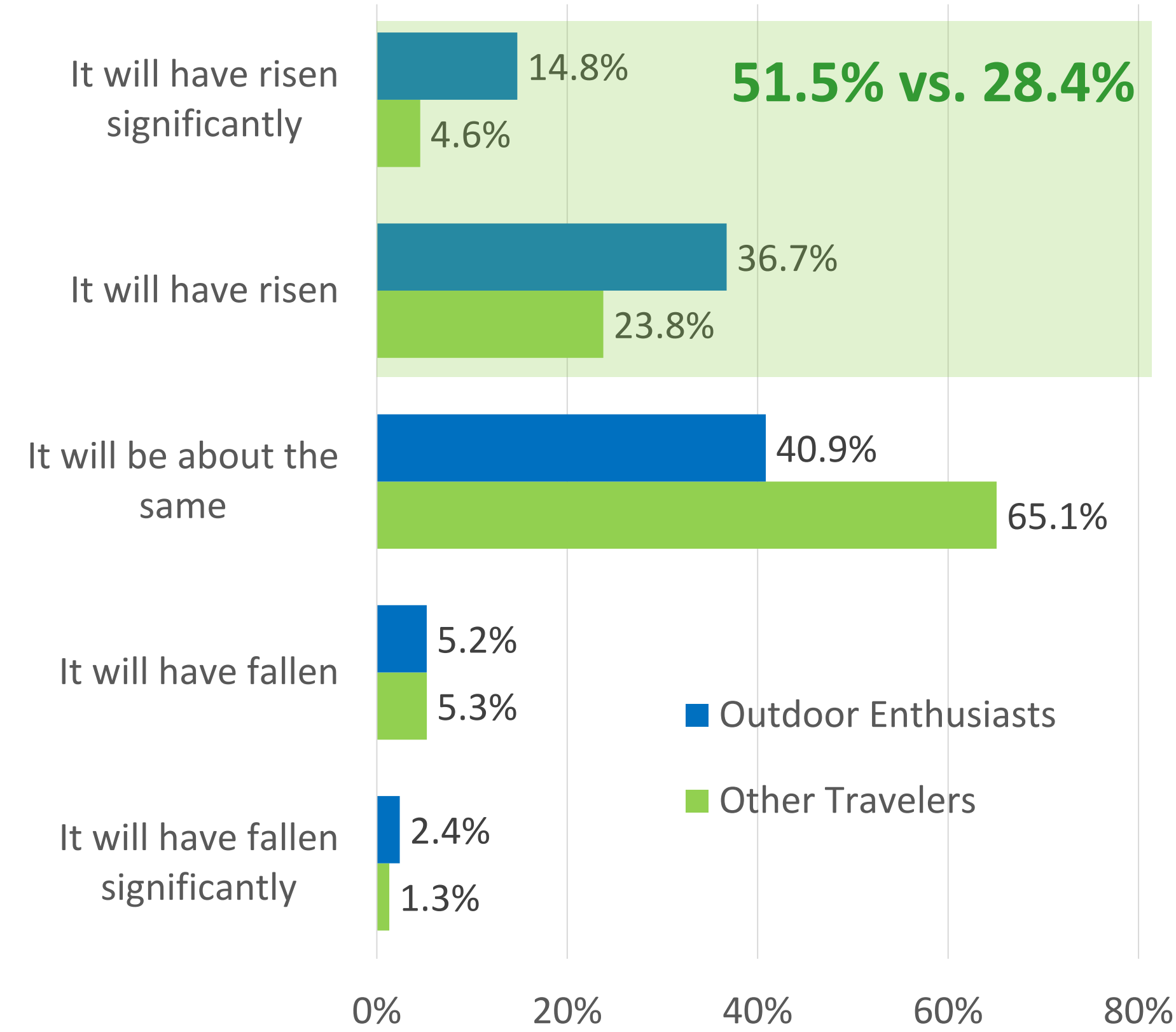
OUTDOOR ENTHUSIASTS: READY TO TRAVEL & SPEND



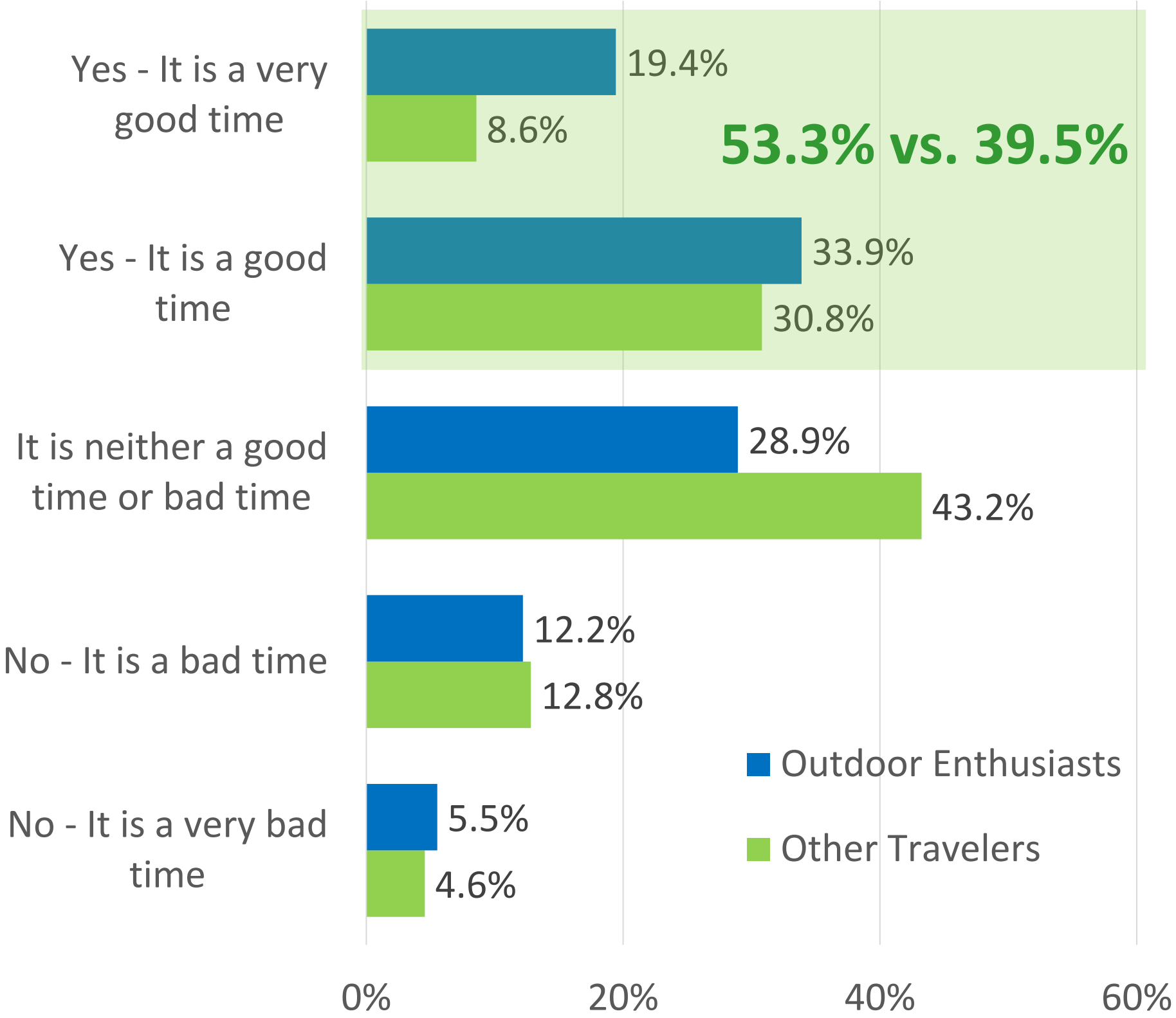
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Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



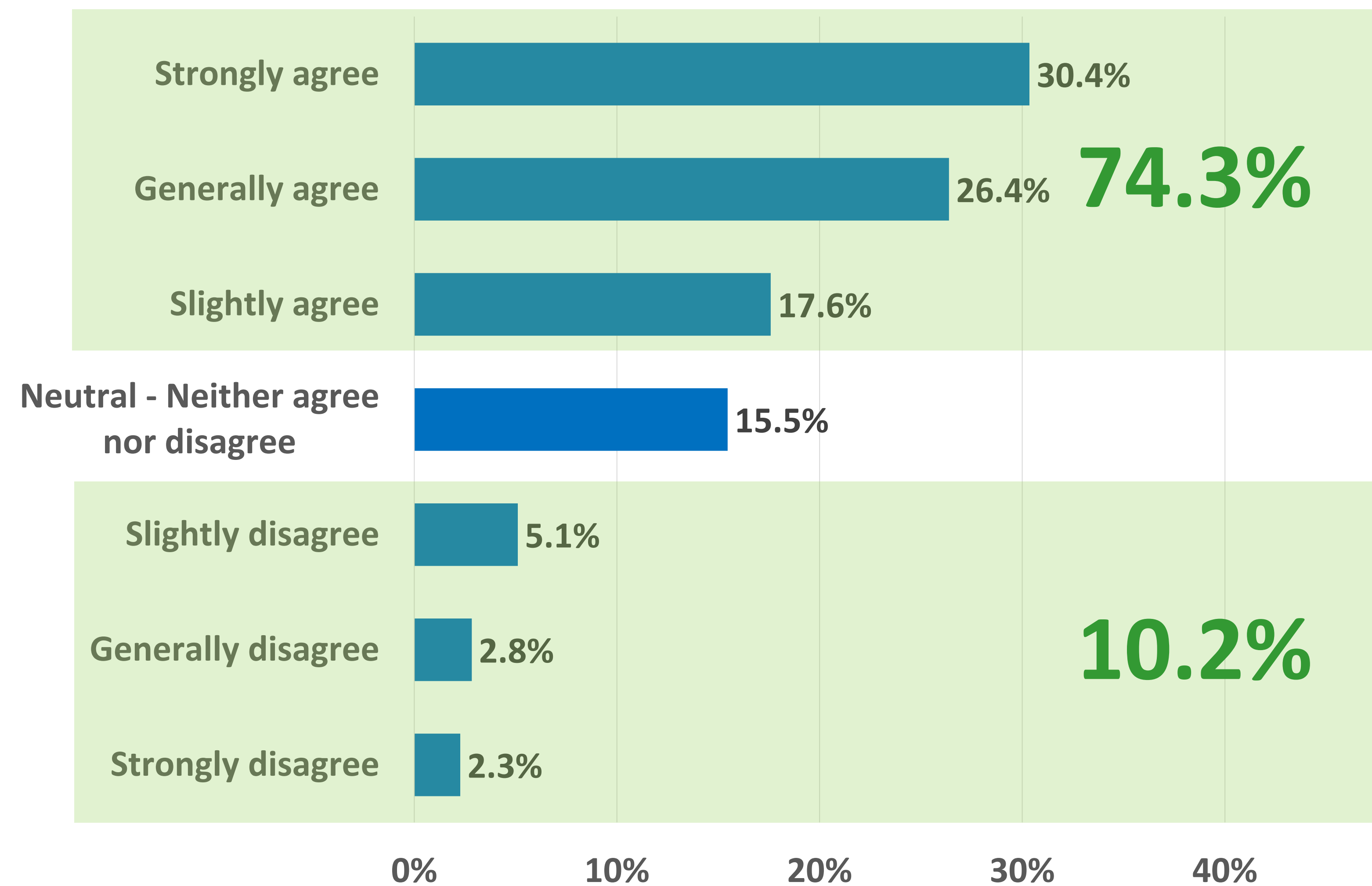


**Are they averse to urban
or city experiences?**

OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Agreement Scale:

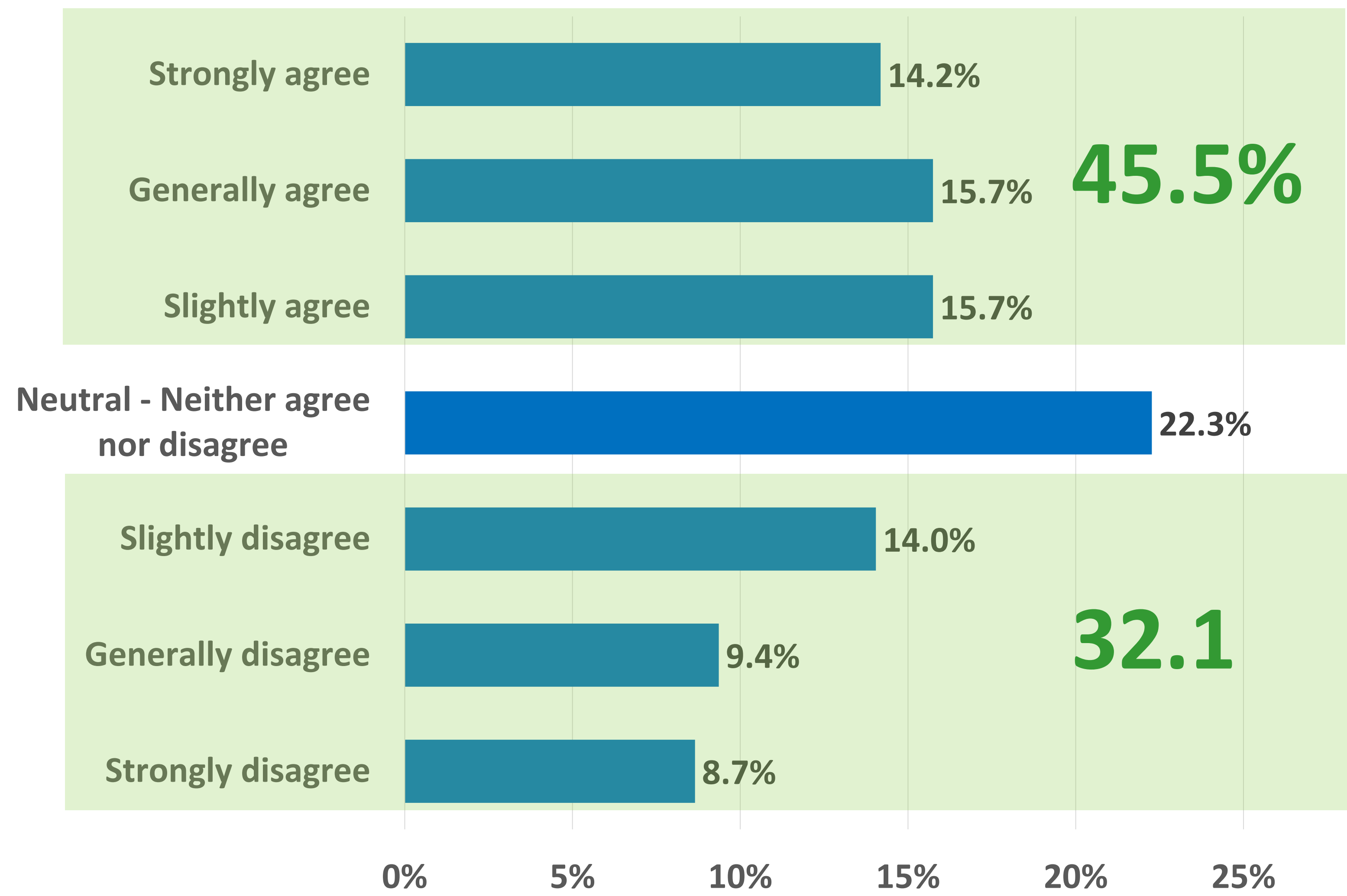
Experiencing nature (away from urban areas) is usually an important part of my leisure travel.



OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Agreement Scale:

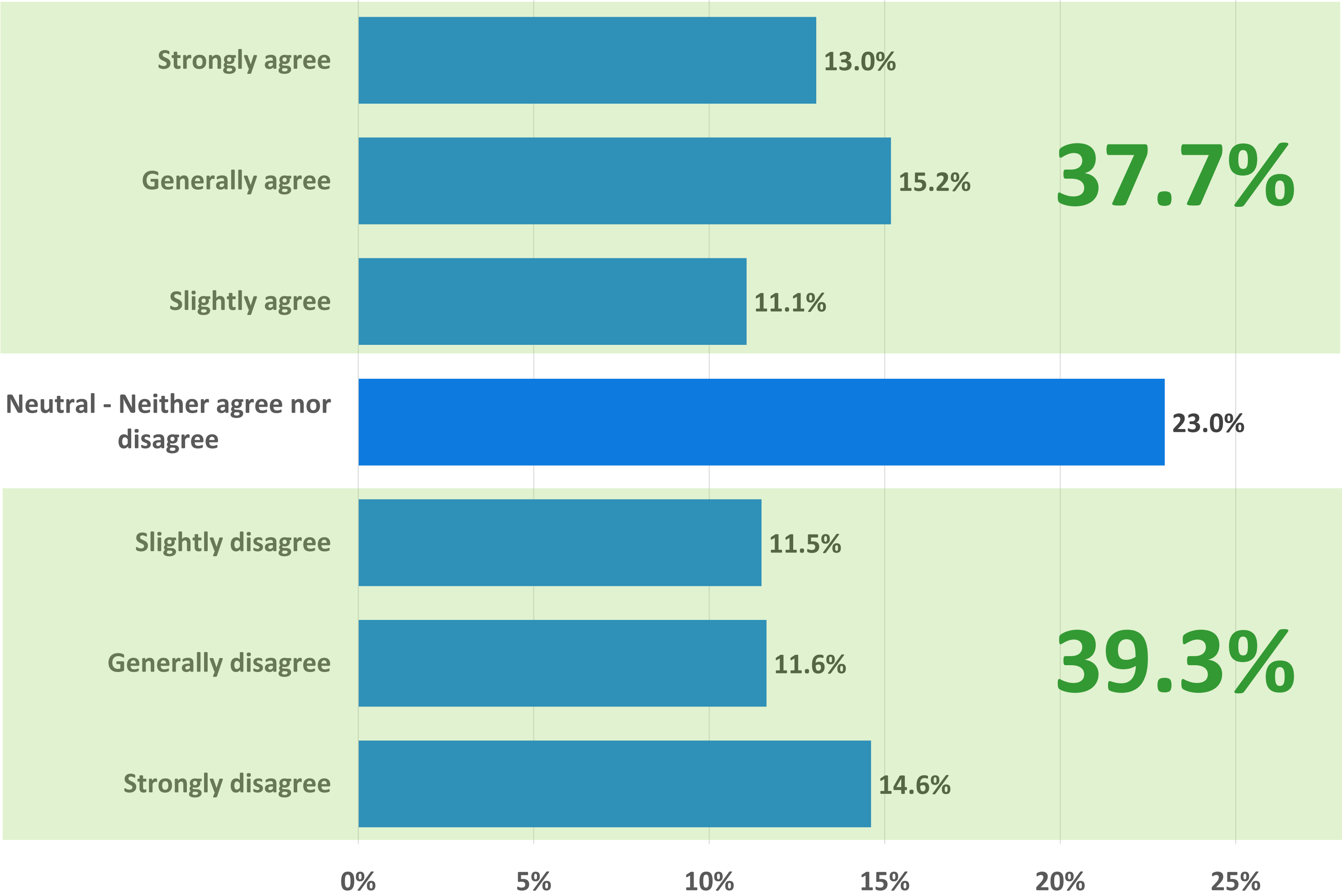
I do not like spending my vacation time in cites



OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Agreement Scale:

I prefer visiting large cities to rural travel experiences (beach resorts, National or State Parks, smaller towns, scenic byways, etc.)

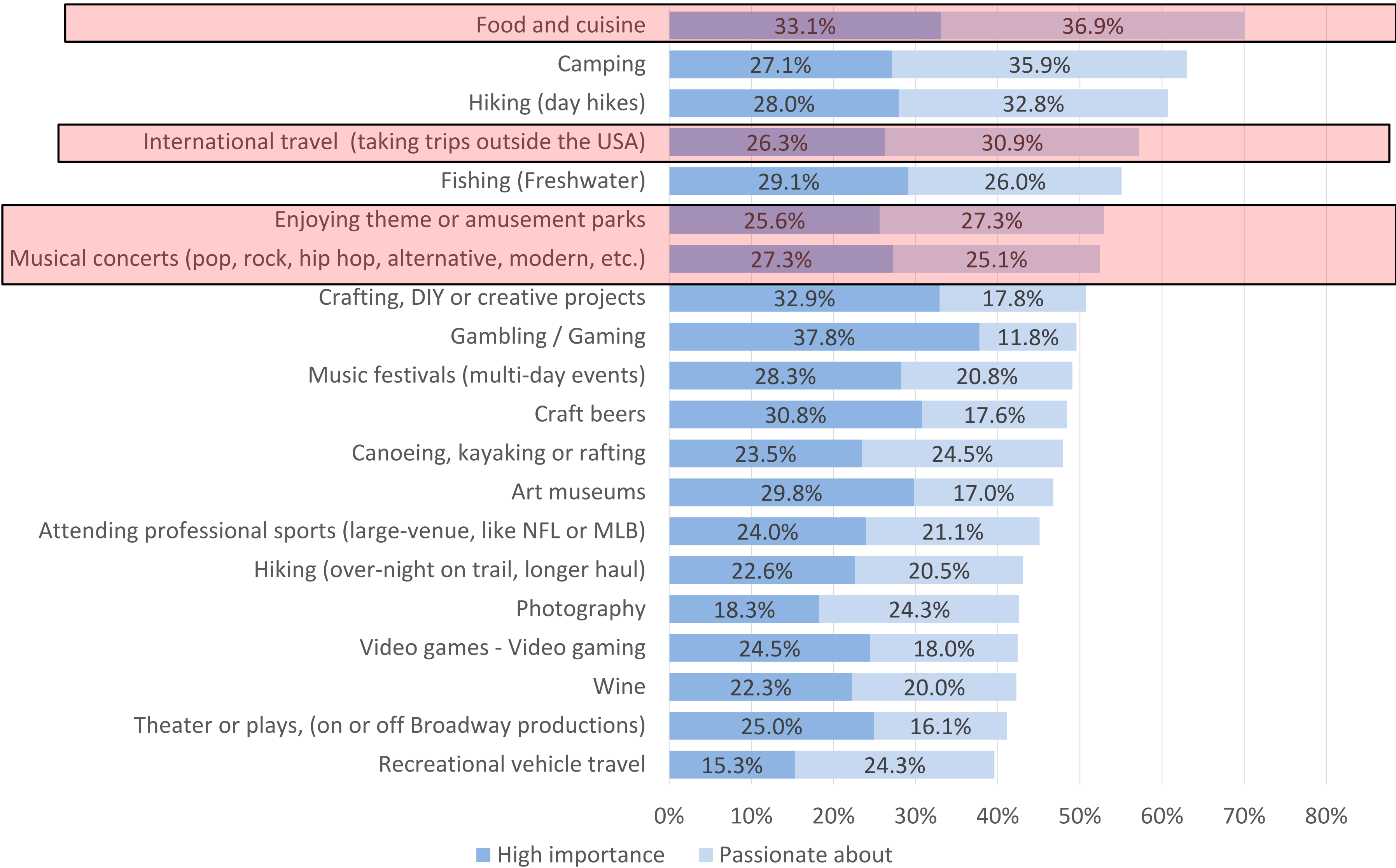




**What are they into beyond
outdoor experiences?**

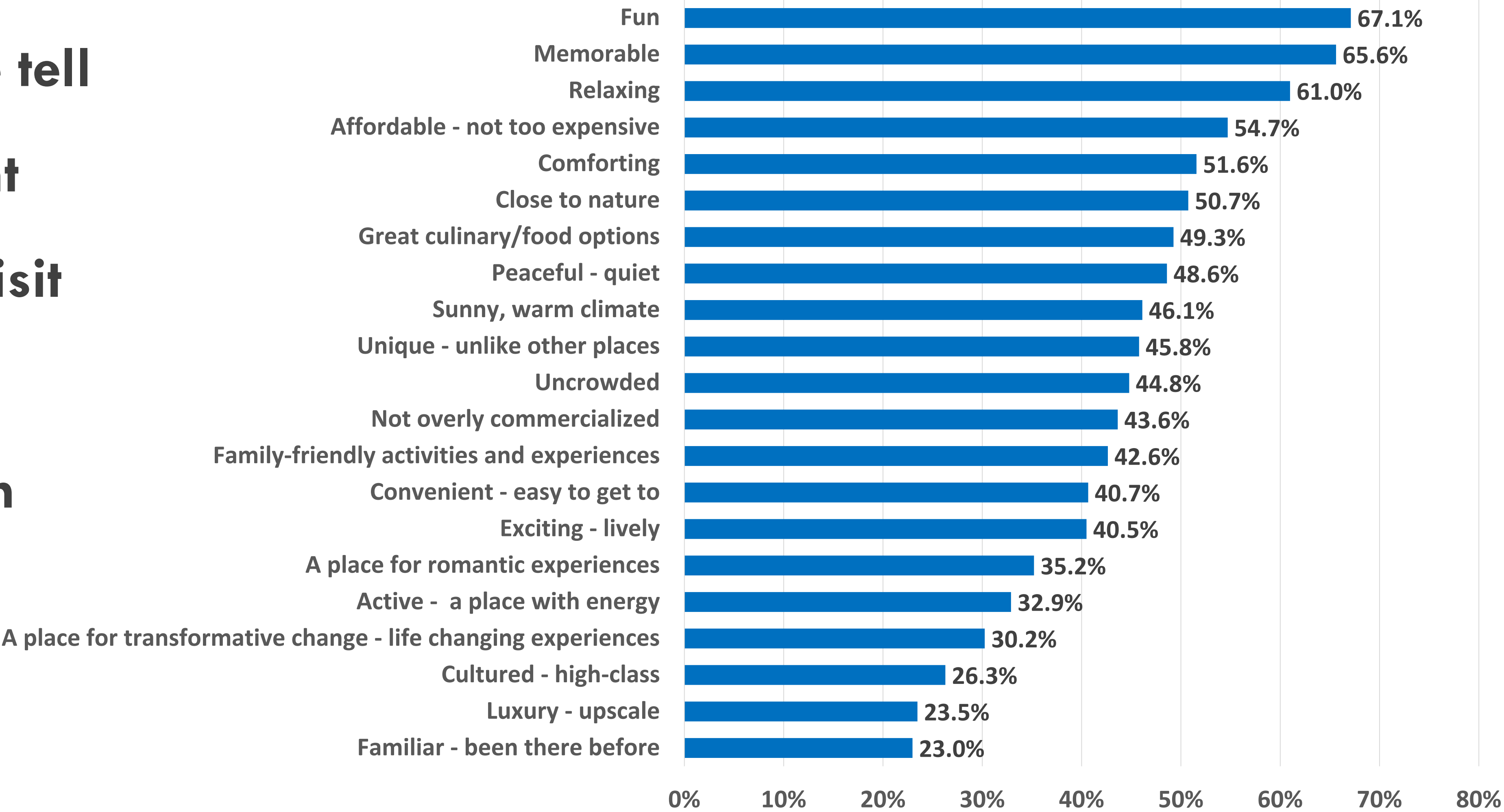
TRAVEL PASSIONS: OUTDOOR ENTHUSIASTS

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



WHAT THEY'RE LOOKING FOR IN TRAVEL: OUTDOOR ENTHUSIASTS

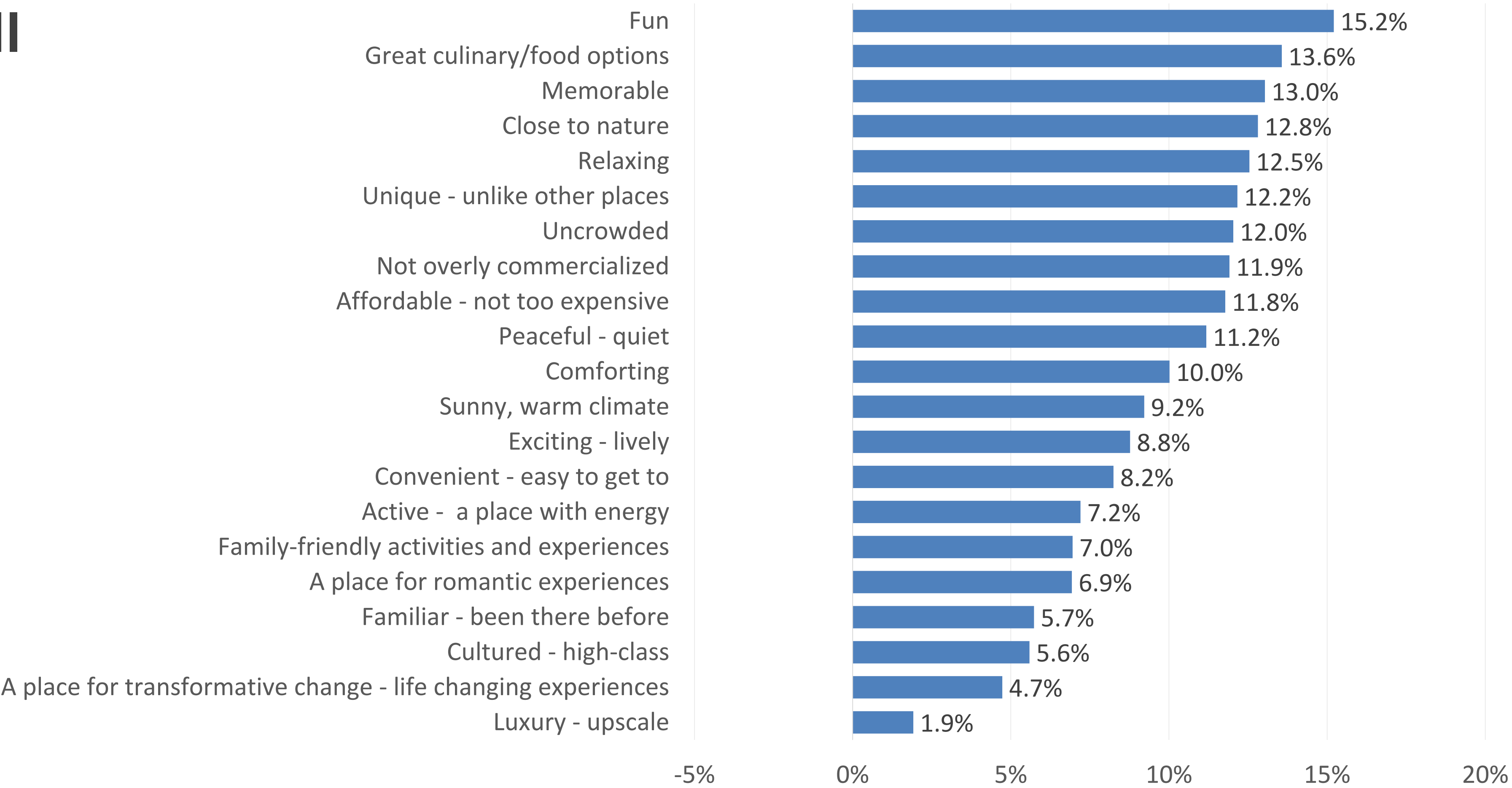
Question: Please tell us how you want the places you visit to be. How important is each attribute?



WHAT THEY'RE LOOKING FOR: OTHERS VS. NP TRAVELERS

(Absolute % difference Outdoor Enthusiasts vs. Other Travelers)

Question: Please tell us how you want the places you visit to be. How important is each attribute?



TAKEAWAYS

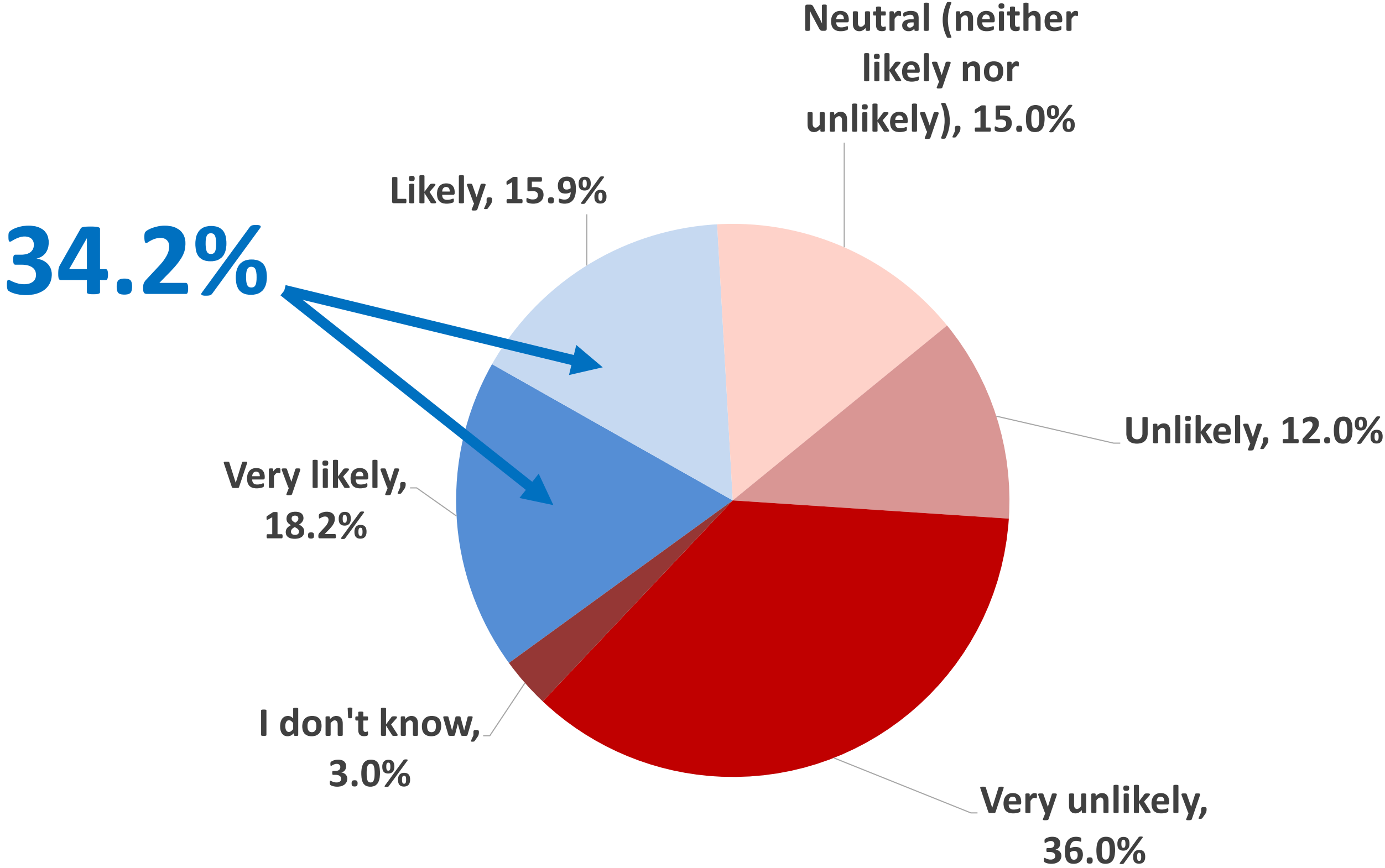
- 1 Outdoor Enthusiasts represent 35 percent of the traveling public. About half of them also visit our National Parks.
- 2 They tend to be younger, with a mean age of 44 compared to other travelers at 53 years of age.
- 3 Travel spending this year will be a high-priority for Outdoor Enthusiasts. Their financial situations are largely solid with high expectations for their pocketbooks in the coming year.
- 4 While experiencing nature away from large cities is typically an important part of their travel, many prefer urban travel destinations to rural ones.



Likely International Travelers

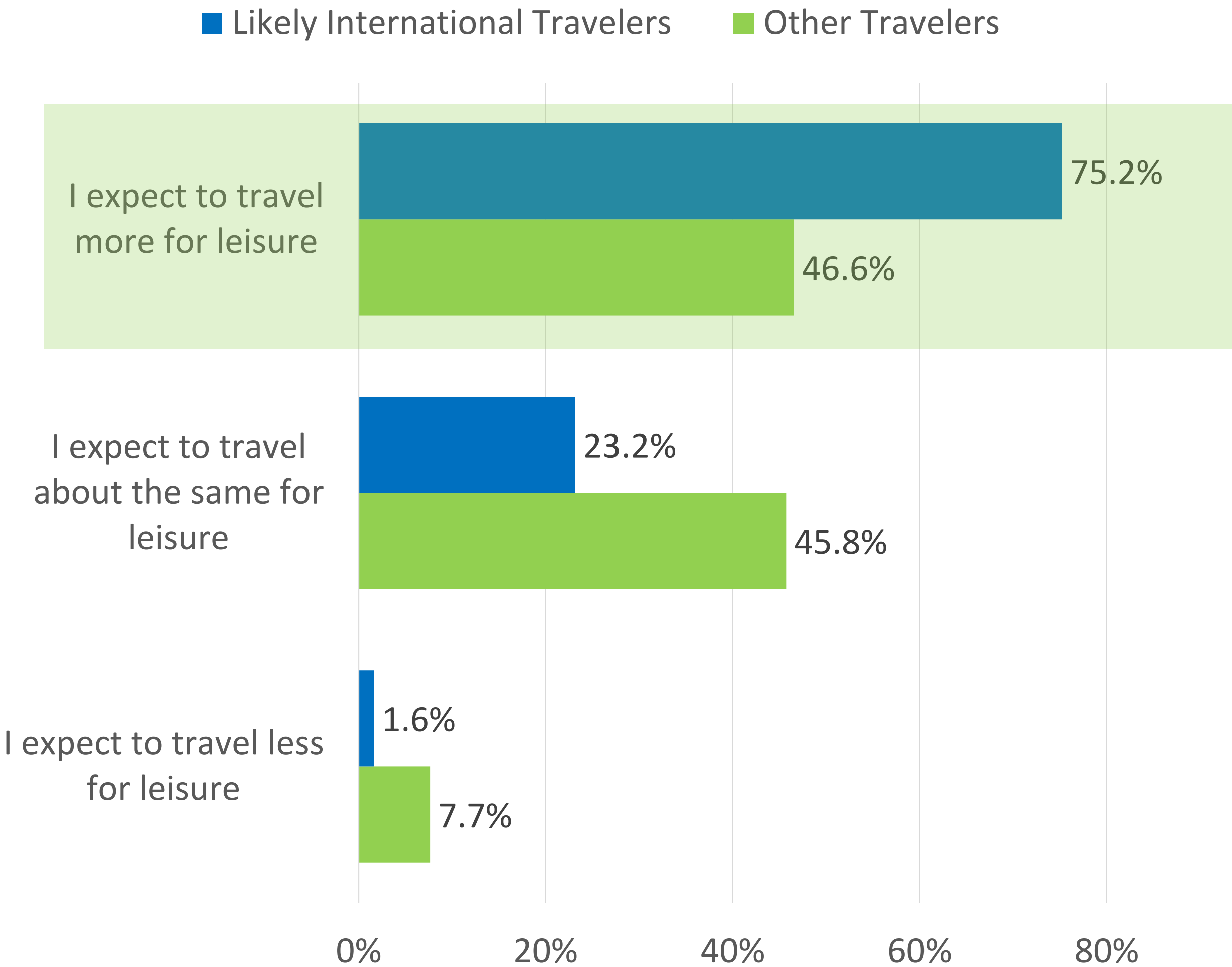
HOW MANY LIKELY INTERNATIONAL TRAVELERS ARE THERE?

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



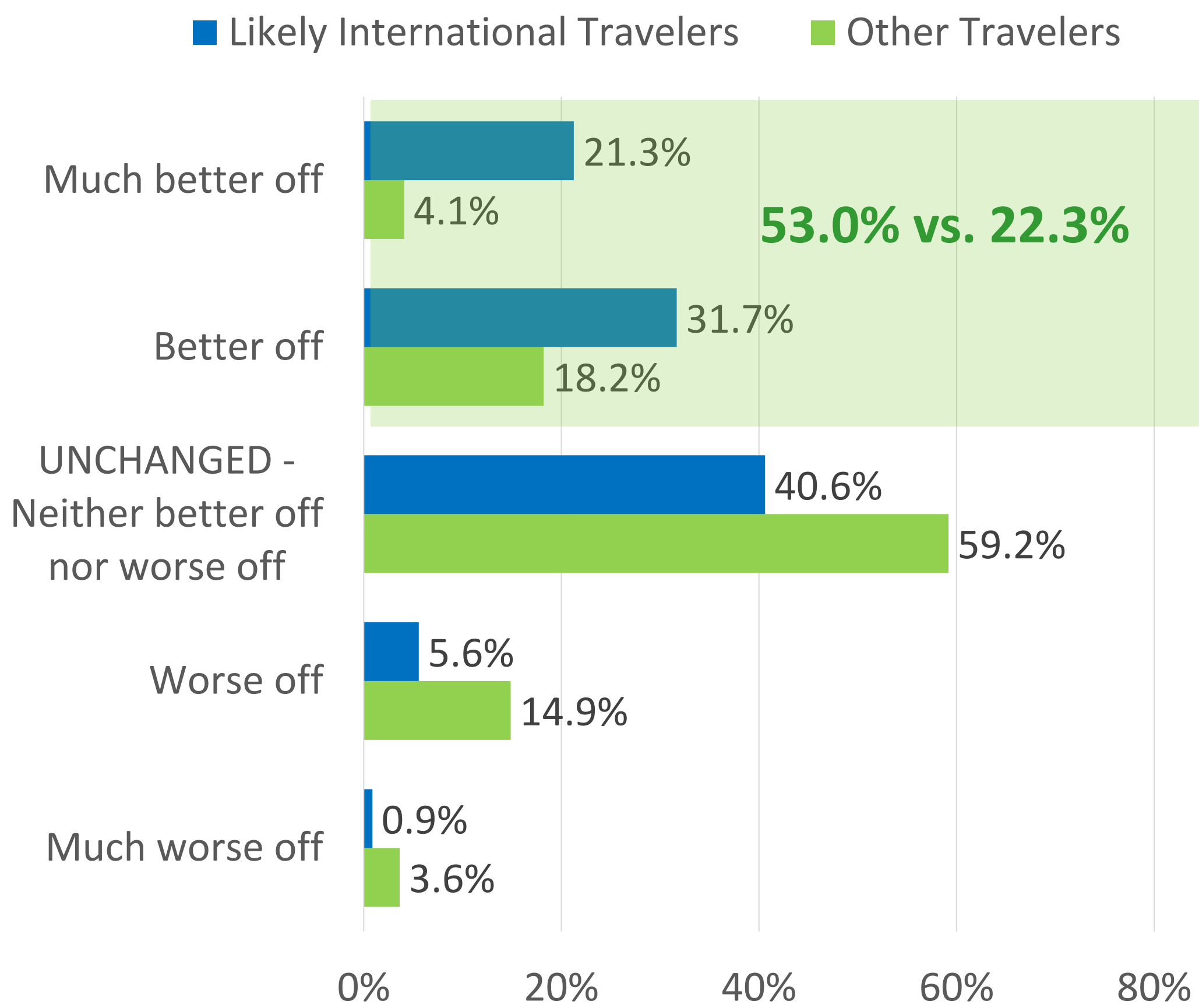
HIGHLY OPTIMISTIC ABOUT FUTURE TRAVELS

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?

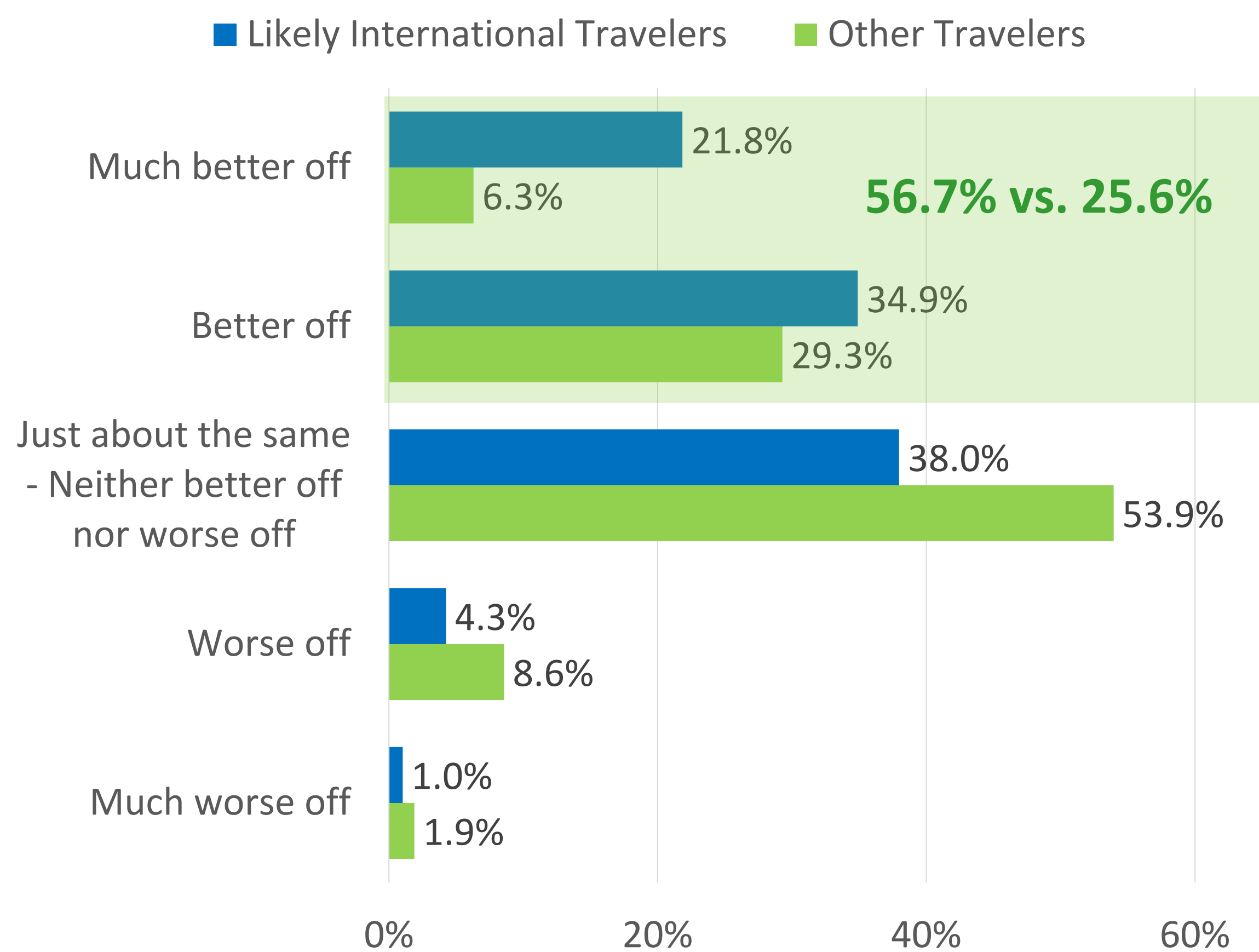


THEY'RE DOING WELL FINANCIALLY

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

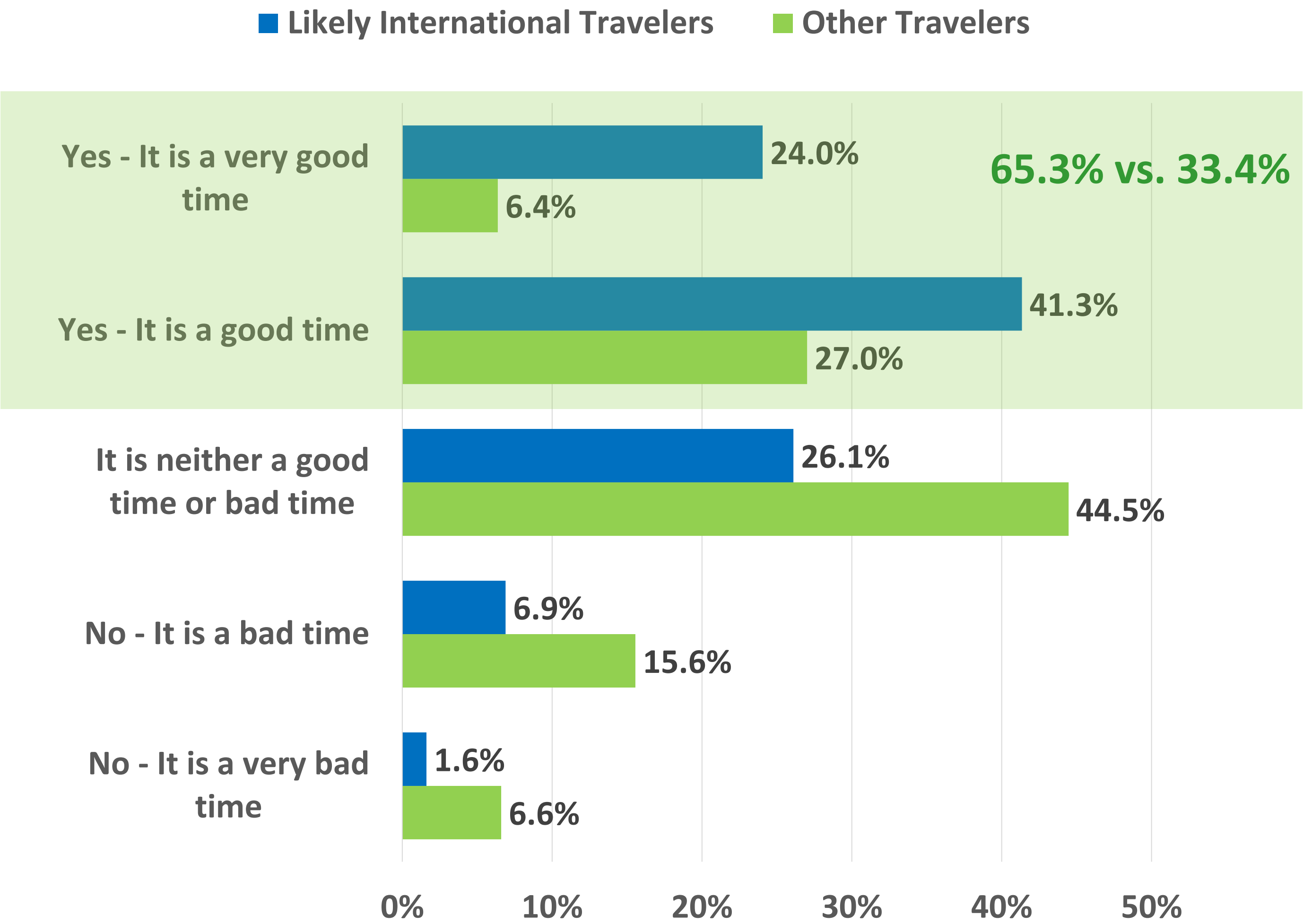


LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



THEY'RE DOING WELL FINANCIALLY

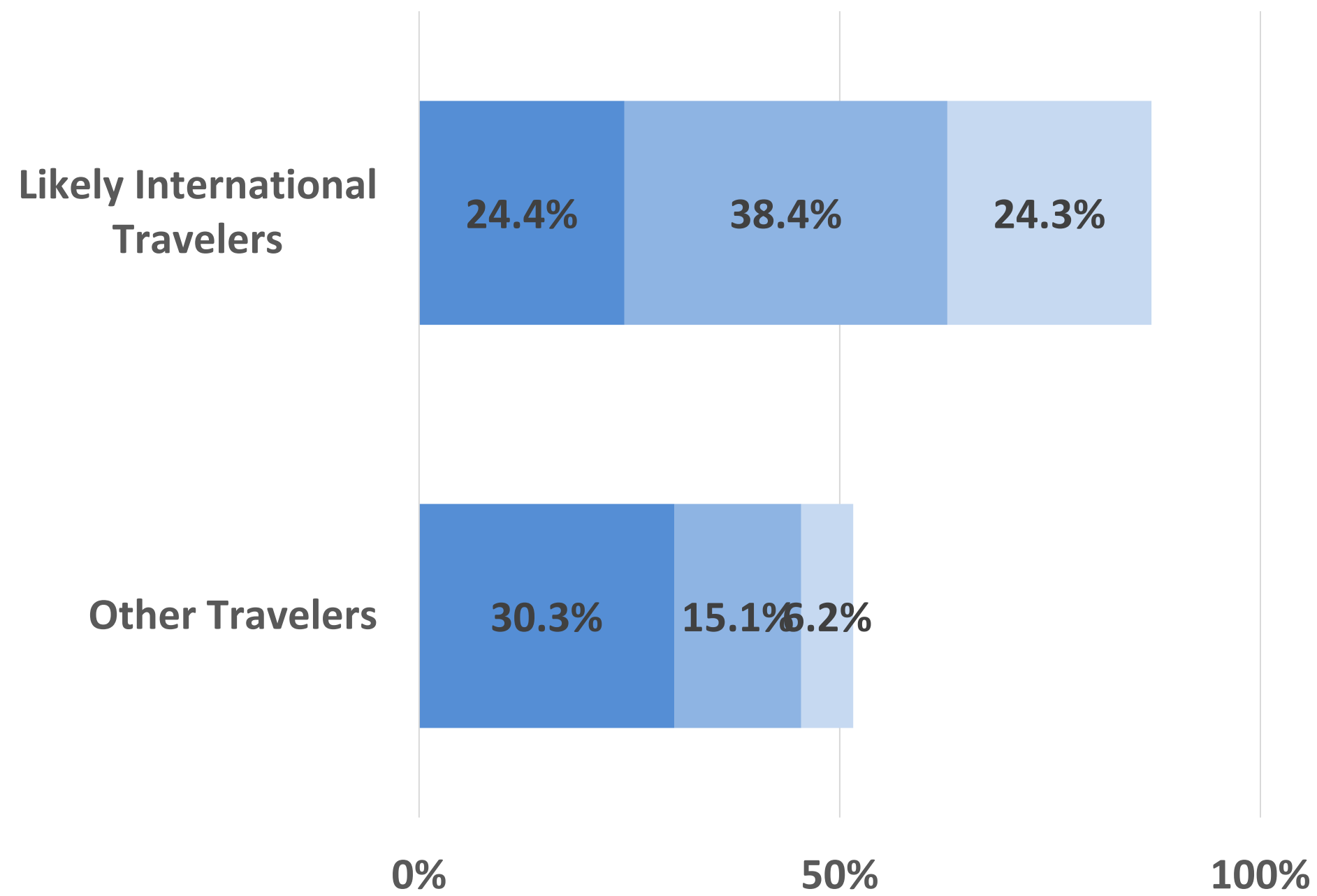
QUESTION: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



SPENDING

Thinking carefully about how you expect to spend your income in the **NEXT 12 MONTHS**, please use the scale below to describe your spending priorities in next year.

■ Somewhat high priority ■ High priority ■ Extremely high priority

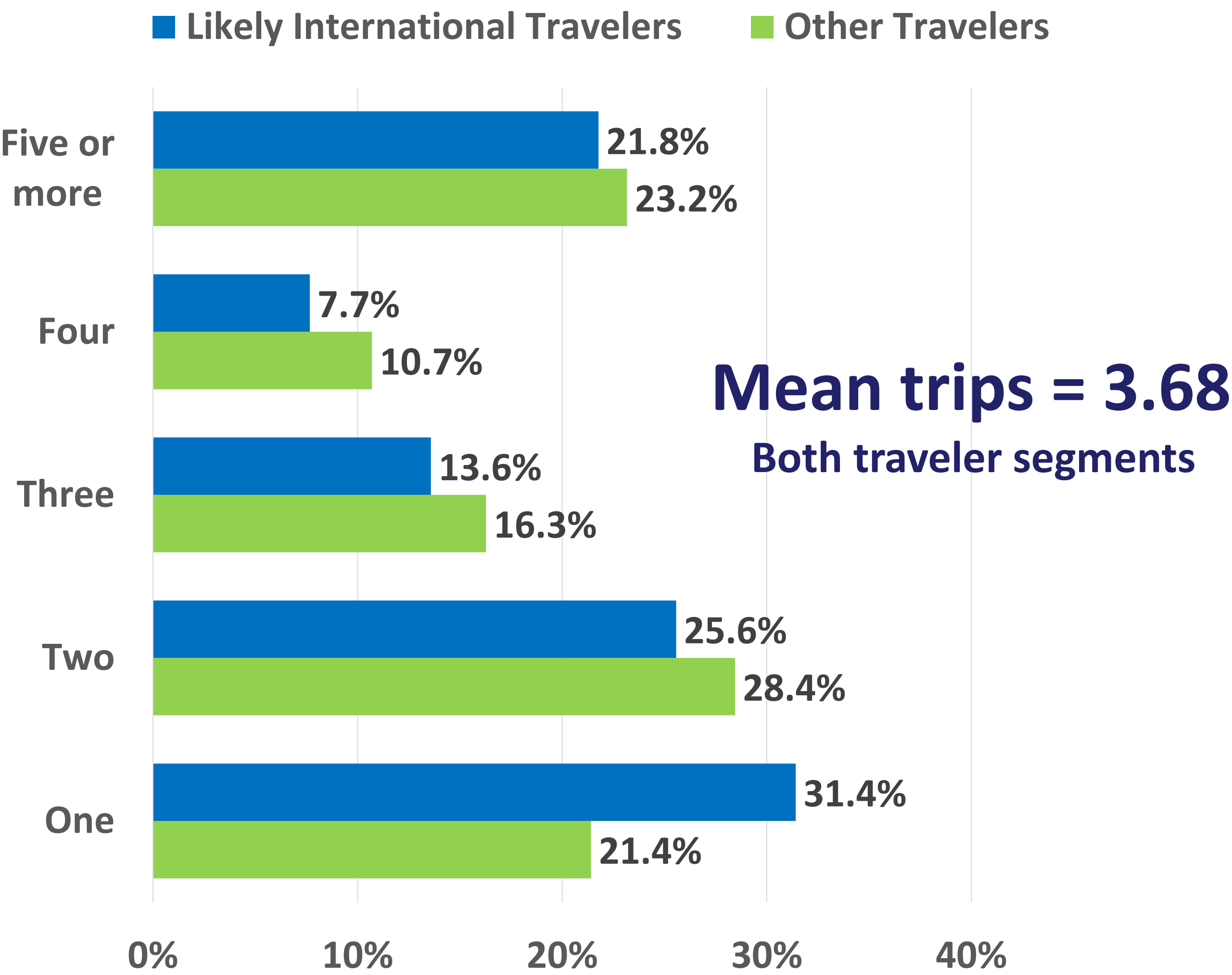


How much **IN TOTAL** is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the **NEXT TWELVE (12) MONTHS**?



SIMILAR OVERALL TRAVEL PROPENSITIES

QUESTION: In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?



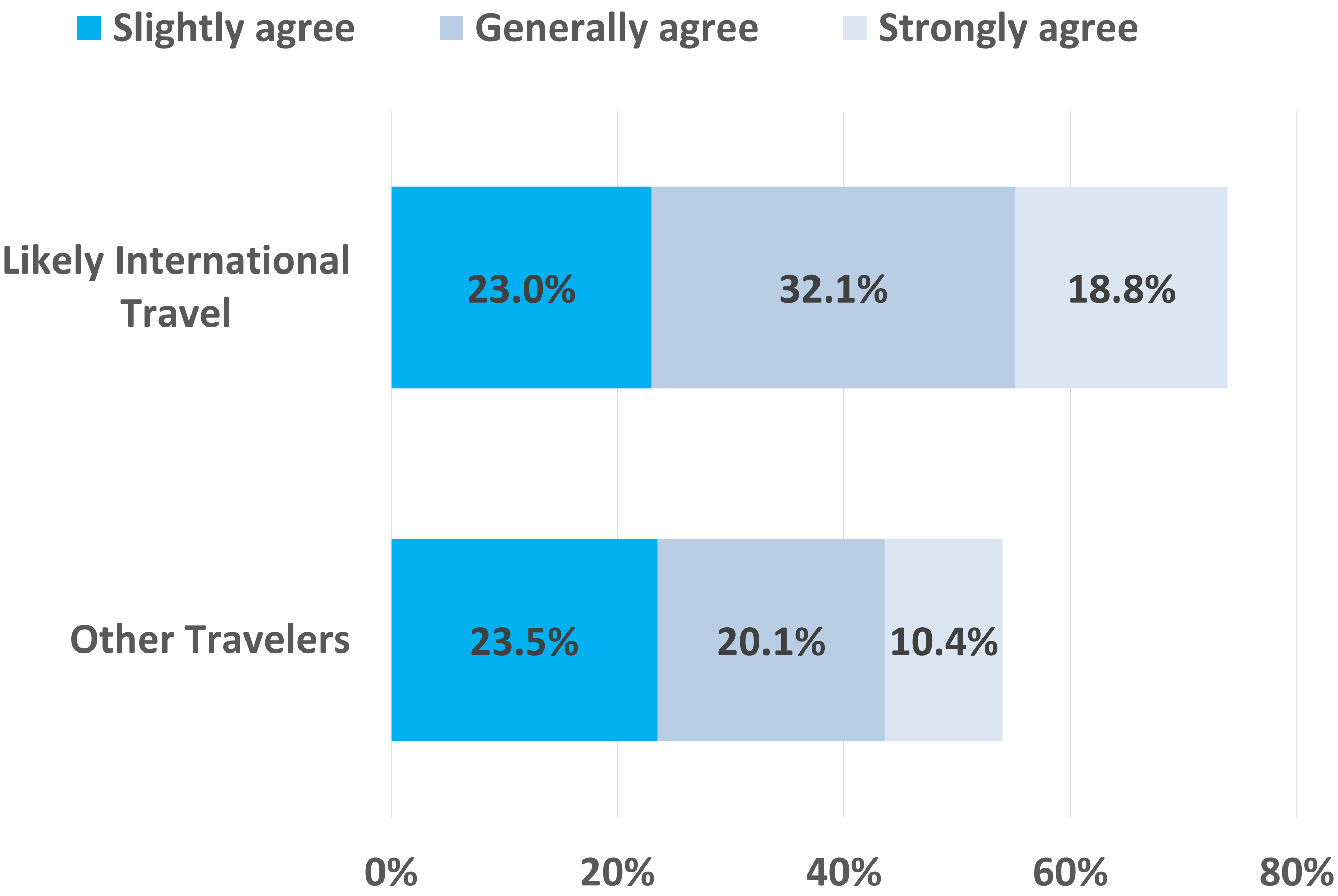


Likely International Travelers
are Authenticity Seekers

AUTHENTICITY SEEKERS

AGREEMENT SCALE:

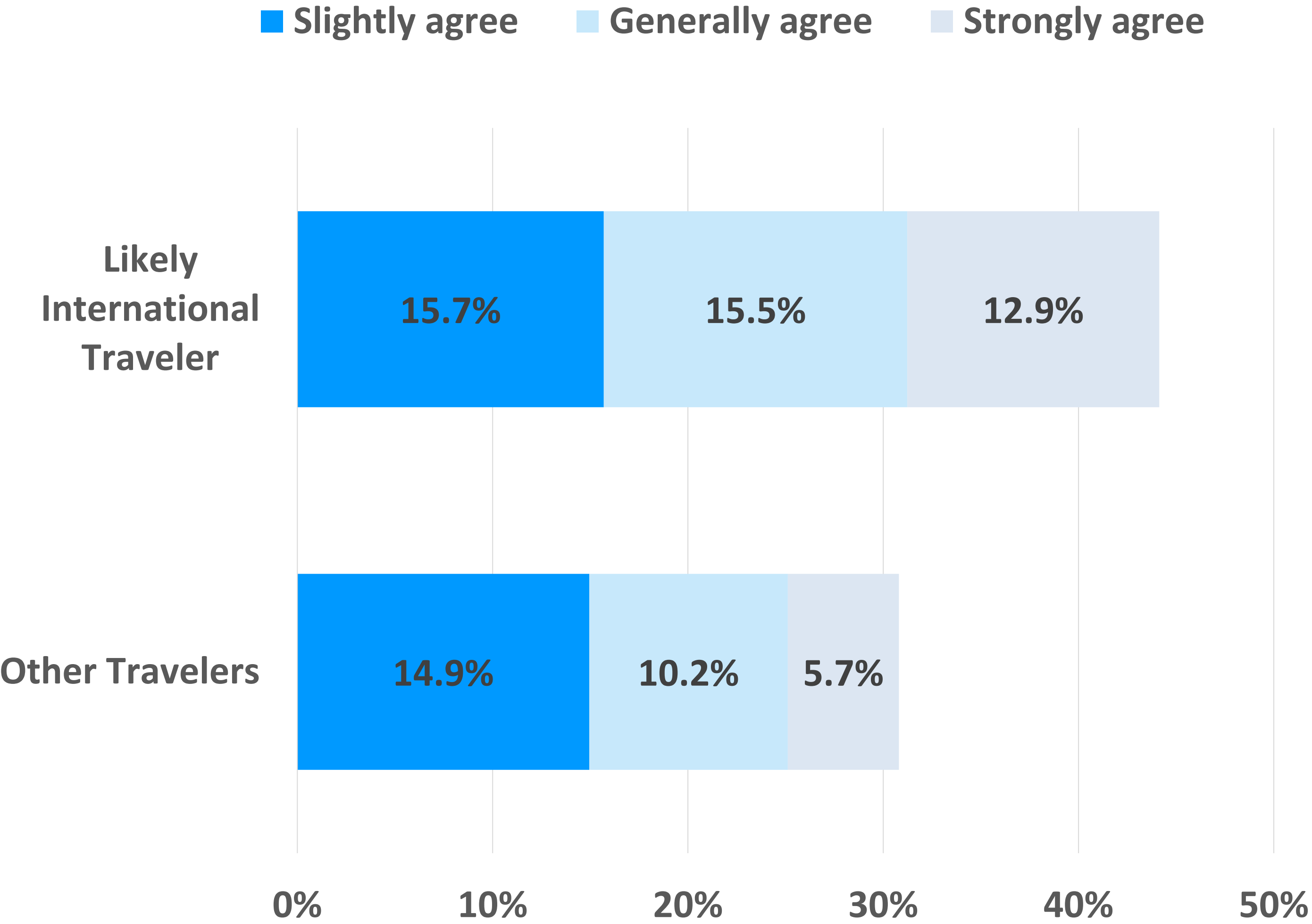
I put effort into finding travel experiences that are unique to (can only be found in) my destination



AUTHENTICITY SEEKERS

AGREEMENT SCALE:

I hate commercial or touristy destinations and attractions



AUTHENTICITY SEEKERS

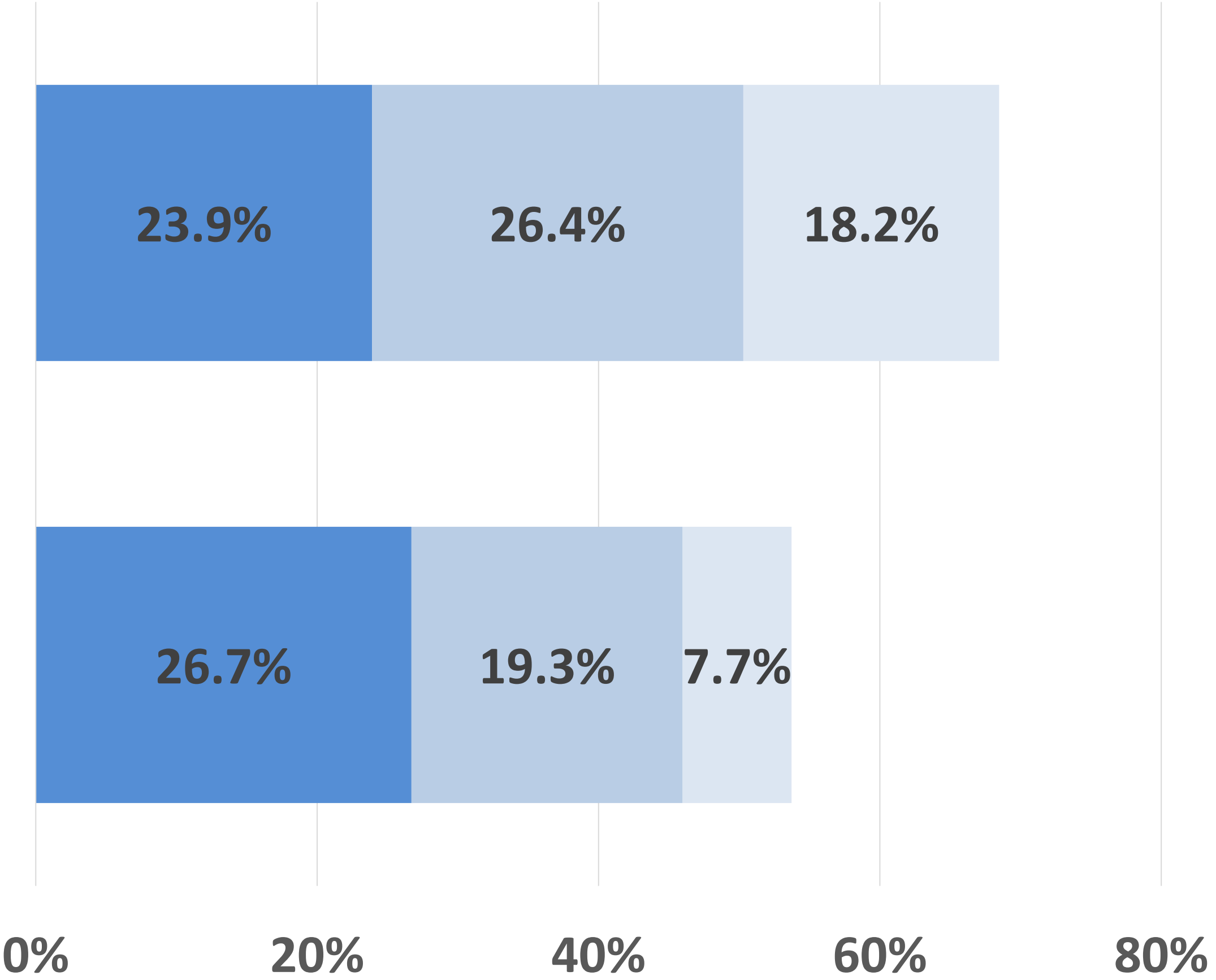
IMPORTANCE SCALE:

■ Slightly important ■ Important ■ Extremely important

Experiencing the lifestyle of
people living in my
destination

Likely International Travel

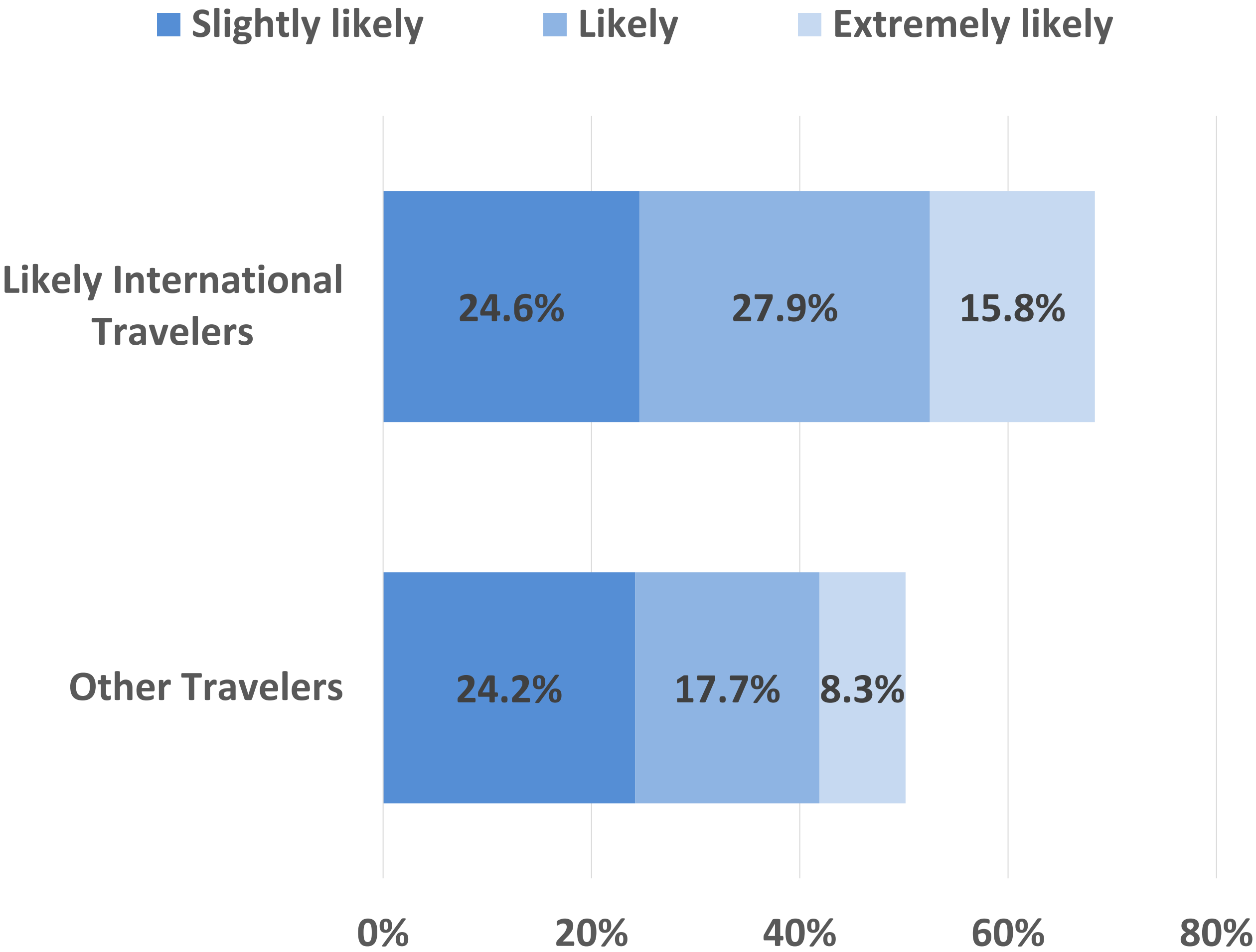
Other Travelers



CULTURAL TRAVELERS

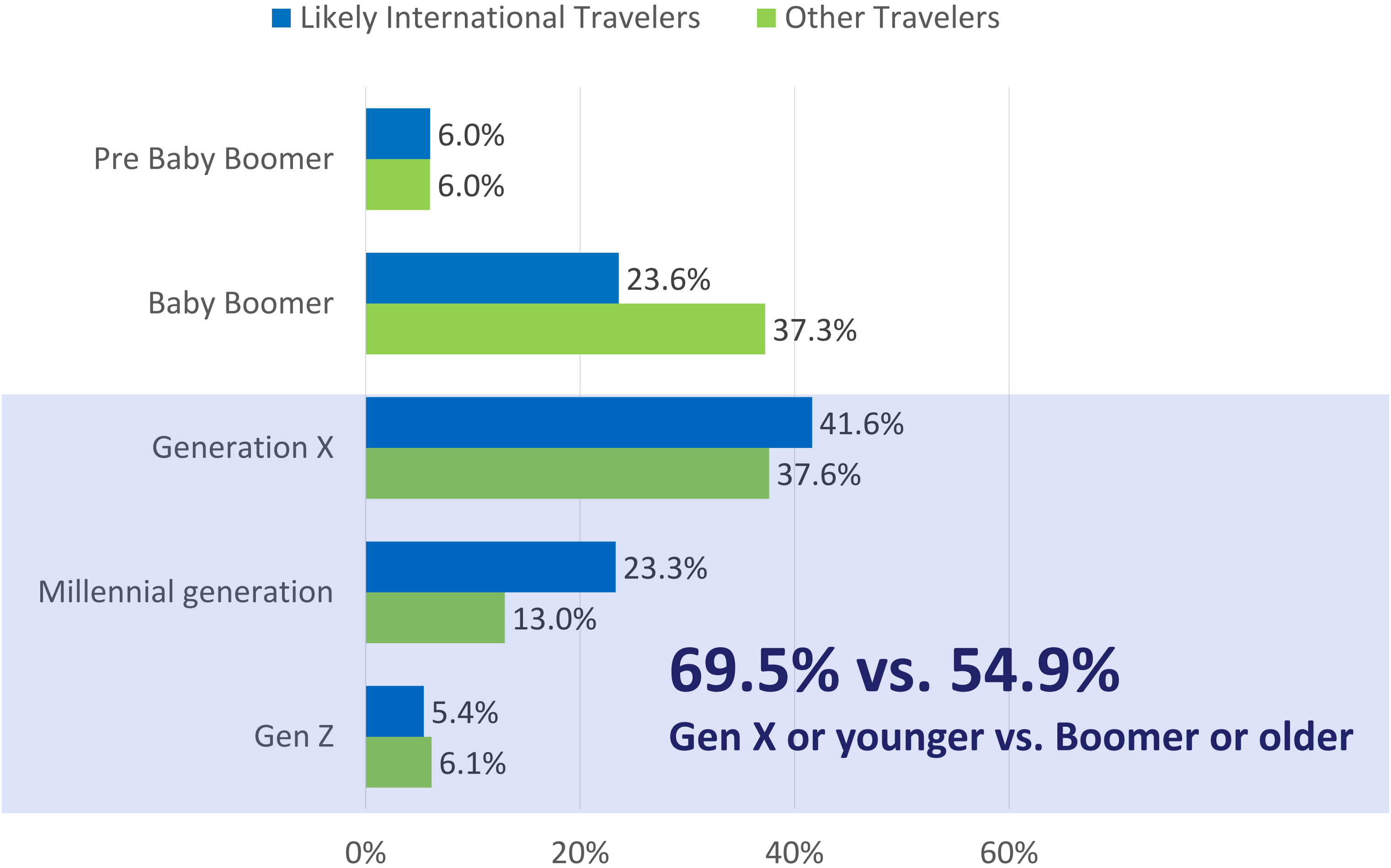
QUESTION:

Prioritize learning as much as possible about the customs, traditions and history of my destination



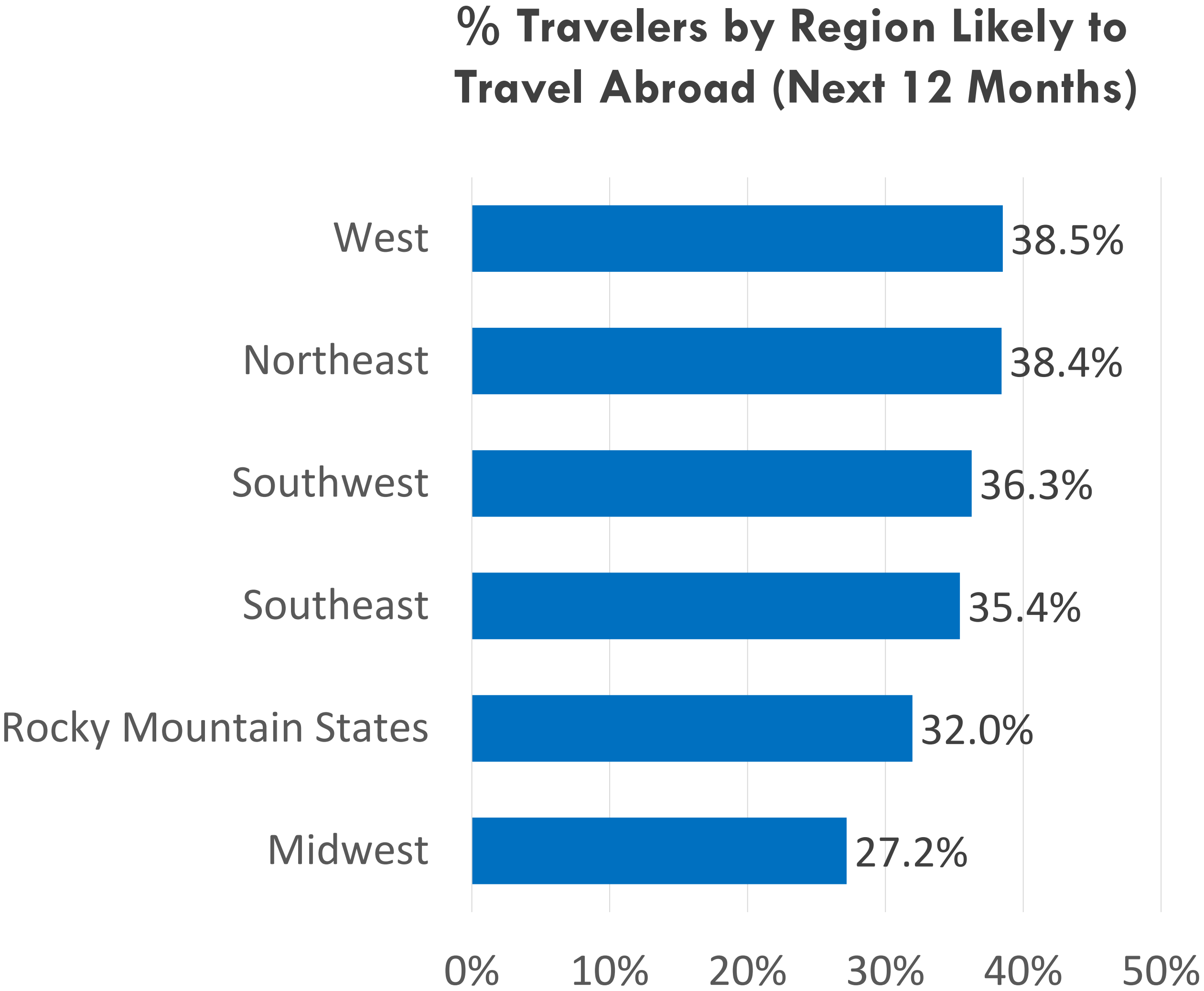
AGAIN, THEY'RE RELATIVELY YOUNGER TRAVELERS

QUESTION: In what
year were you born?



MOST LIKELY TO LIVE IN THE WEST OR NORTHEAST

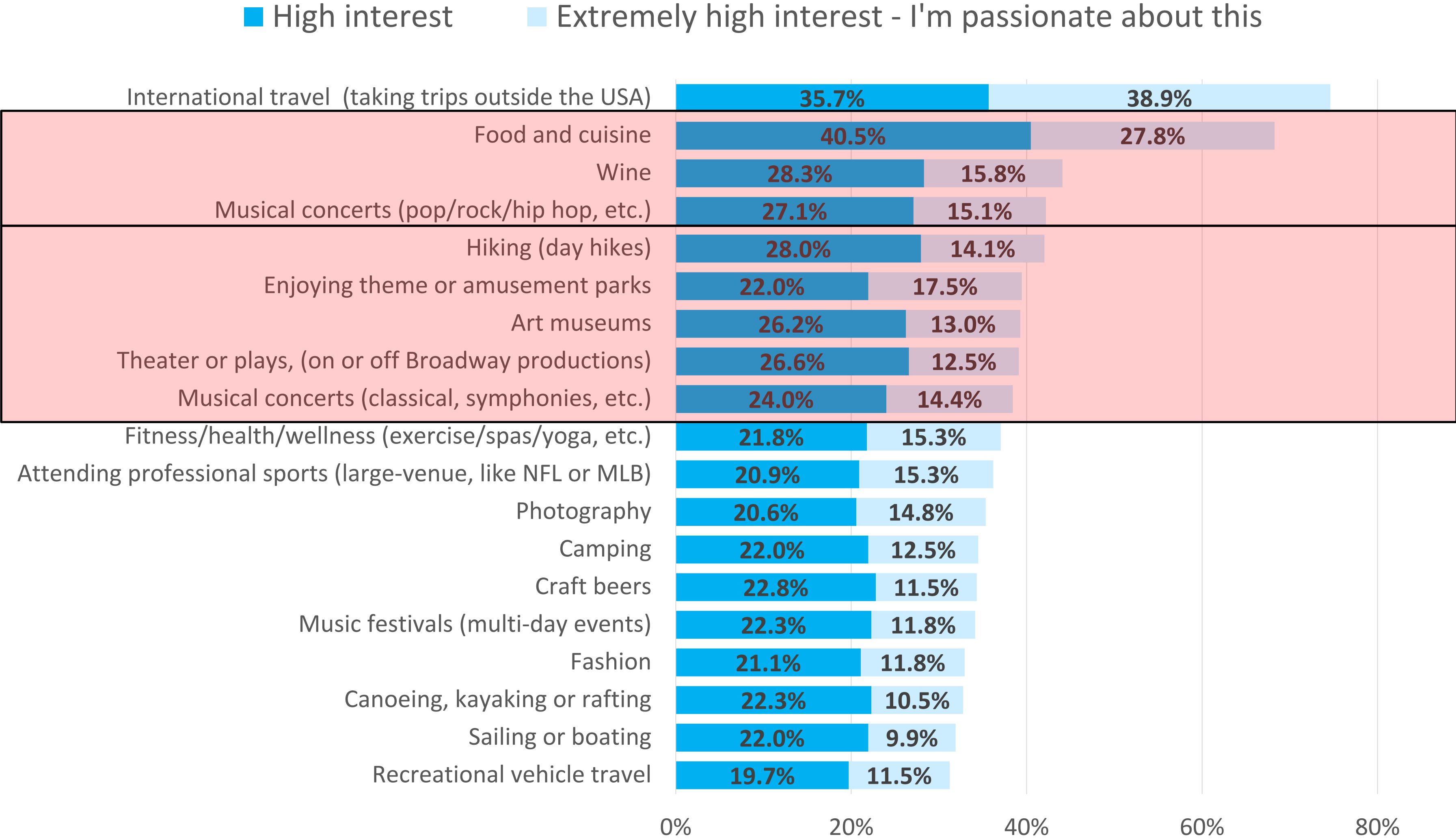
QUESTION: In what state do you live?



TRAVEL PASSIONS: LIKELY INTERNATIONAL TRAVELERS

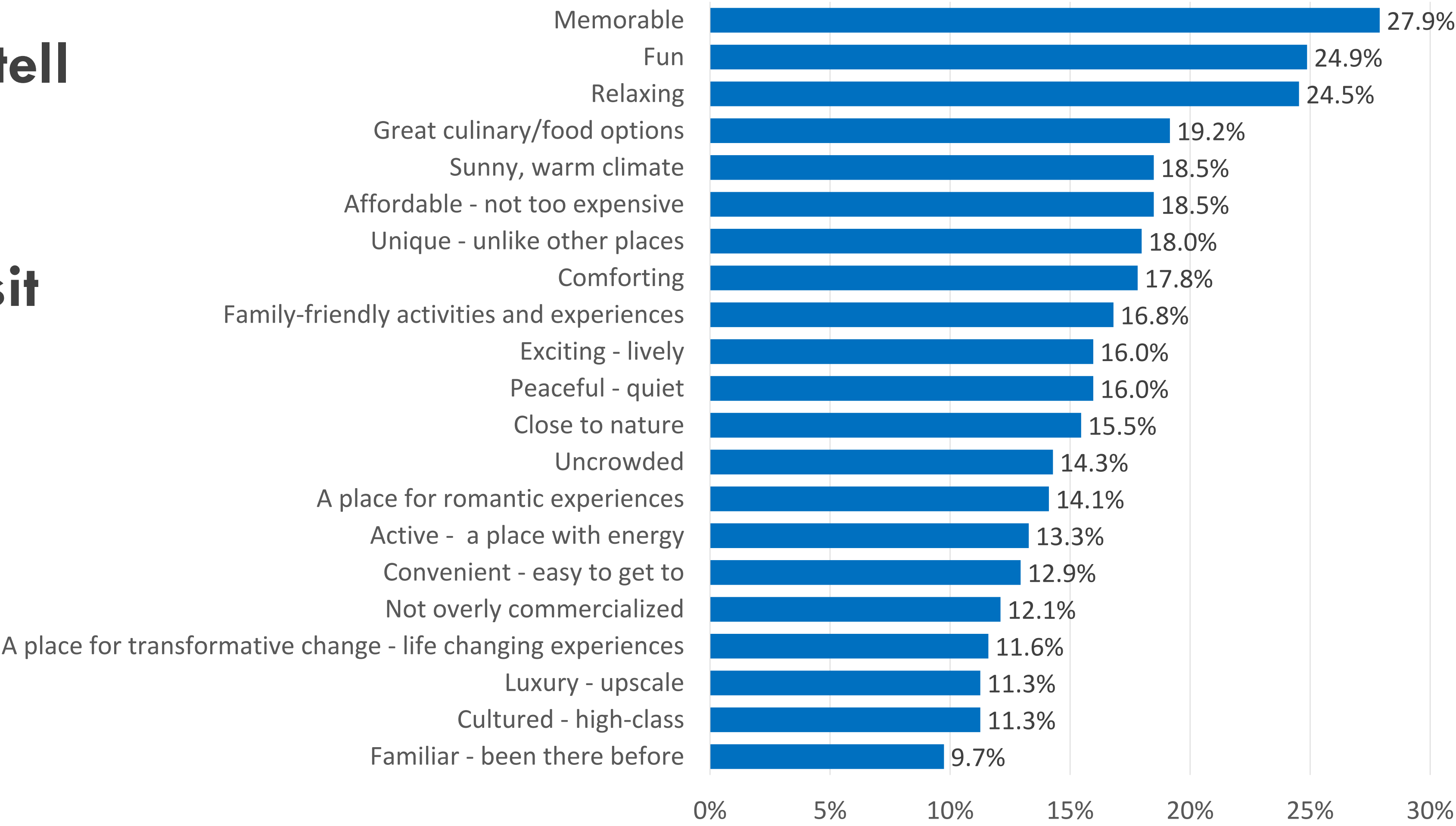
Question: Tell us about your hobbies and passions.

Please use the scale below to describe your interest in each.



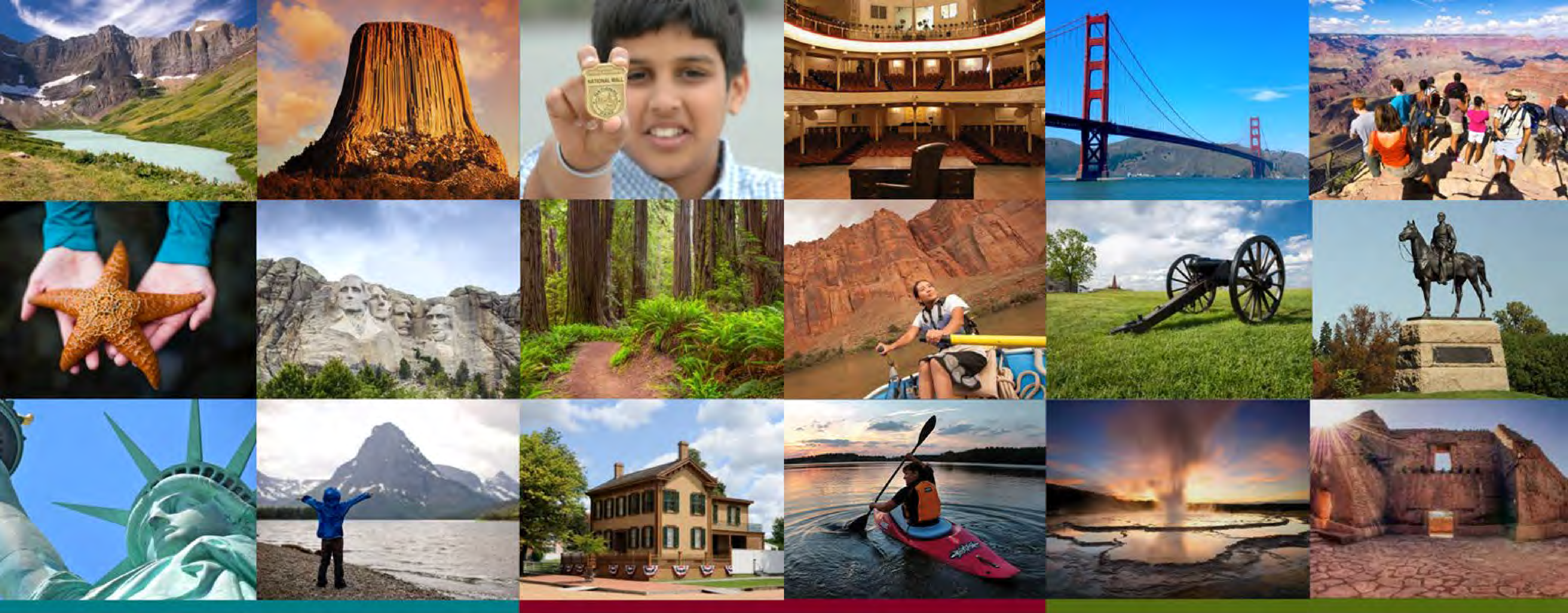
WHAT THEY WANT: LIKELY INTERNATIONAL TRAVELERS

Question: Please tell us how you want the places you visit to be. How important is each attribute?



TAKEAWAYS

- 1 About one-third of American leisure travelers say they are likely to travel abroad in the next 12 months.
- 2 This group has extremely high expectations for travel in the upcoming year--and appear be in a quite sound financial situation.
- 3 Likely International Travelers are authenticity seekers.
- 4 In addition to international travel, these travelers tend to be passionate about food and wine and musical concerts.



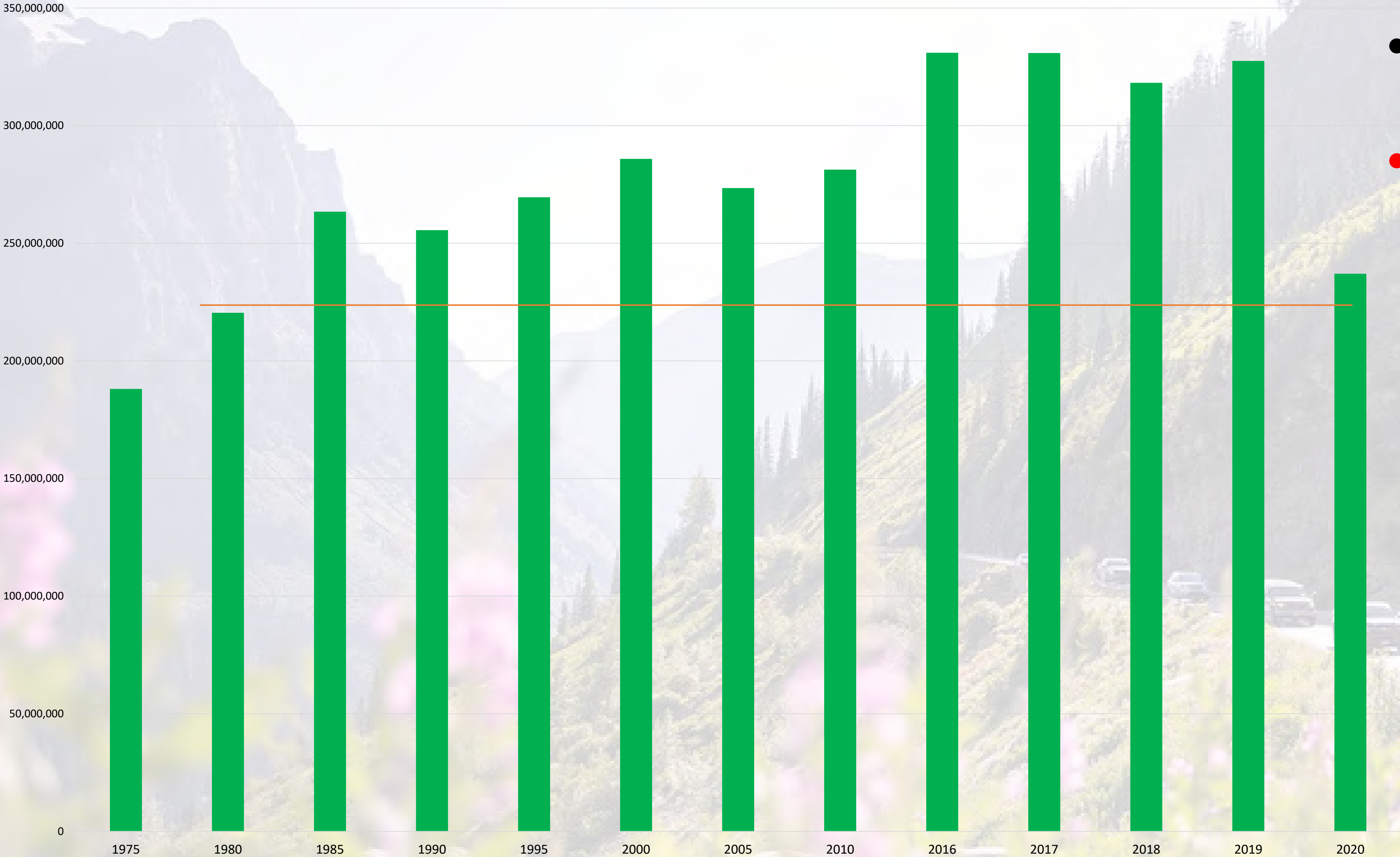
NPS Tourism Program
State of the American Traveler
September 2021

FIND YOUR
PARK



2020 Visitation

National Park System - Recreation Visits 1975-2020



2020

- 423 units
- 237,064,332 Recreation Visits
- **-28%** year-over-year

YET...

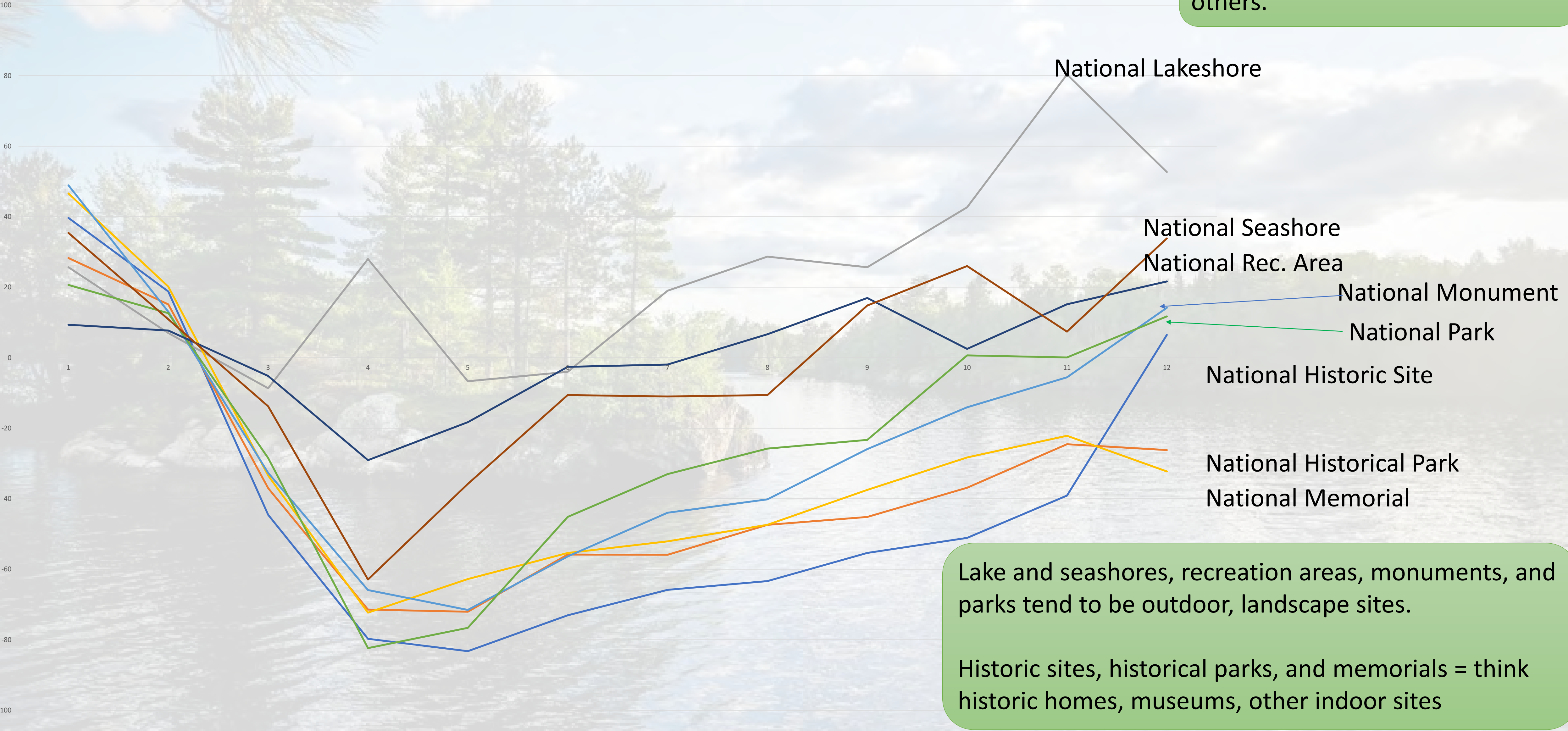
15 parks set visitation records in 2020, including:

- Indiana Dunes NP
- Lassen Volcanic NP
- Sleeping Bear Dunes NL
- Little River Canyon NPRES
- Petroglyph NM
- Paterson Great Falls NHP

2020 Visitation

Average Percent Visitation Change by Designation Month-by-Month

Certain designations experienced swifter rebounds in visitation than others.



Lake and seashores, recreation areas, monuments, and parks tend to be outdoor, landscape sites.

Historic sites, historical parks, and memorials = think historic homes, museums, other indoor sites

2021's Trends

SH Star-Herald

Wind Cave see tours sell out as park visitation increases

HOT SPRINGS, S.D. — Despite a challenging 20 months for Wind Cave National Park, visitation to the park has remained steady as cave tour ...

1 week ago



GLE Great Lakes Echo

Second Spike: Great Lakes parks anticipate increased ...

"Visitation at national parks is increasing and expected to continue to grow through the summer," The National Park Service (NPS) said in a ...

3 weeks ago



ENR East Idaho News

Grand Teton National Park has record visitation in July

Additional data on National Park Service visitor-use statistics is available at irma.nps.gov/STATS/. Park staff are collecting data and ...

22 hours ago

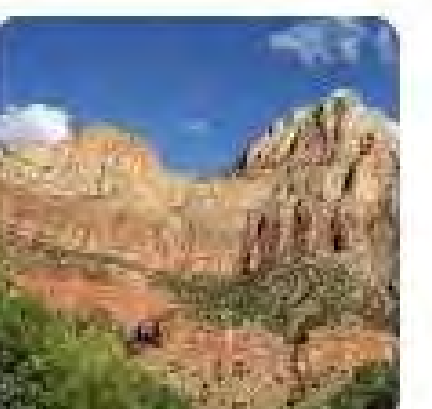


USN USNews.com

Zion National Park Sets Another Visitation Record

Arches National Park temporarily delays entry almost daily now because of high visitation volumes but the official data hasn't been released ...

1 month ago



NG Jackson Hole News & Guide

1M visitors flocked to Yellowstone in July | Local ...

Yellowstone National Park Superintendent Cam Sholly, right, speaks to the press Friday during a visit from U.S. Secretary of the Interior ...

1 day ago



DP The Denver Post

RMNP continues to see increased visitation

Visitation numbers at Rocky Mountain National Park (RMNP) continue to climb as the park enters its peak season and the second full month of ...

1 month ago



WAVY.com

Outer Banks national parks reporting record-high visitation

MANTEO, N.C. (WAVY) — The National Park Service in North Carolina is reporting historic levels of visitation at several of their parks in ...

4 weeks ago



Outlook for fall/winter 2021-2022:

- Coronavirus variants are the most critical factor
- Parks with outdoor activities accessible in the fall and winter will likely be popular
- Parks with indoor activities (historic homes, museums, etc.) will trail in popularity, but health and safety protocols and increasing vaccinations will encourage visitation

Parks & Destinations

Many DMOs pivoted to feature the outdoors in 2020...



MIAMILAND GREATER MIAMI AND THE BEACHES



GREATER MIAMI'S NATIONAL PARKS

Greater Miami provides easy access to the natural wonders of Everglades National Park, Biscayne National Park and Big Cypress National Preserve. Venture into the vast wilderness of these parks to explore coastal waters, coral reefs, endless expanses of marsh and sawgrass, and amazing night skies.

[LEARN MORE >](#)

...including Miami, who coordinated content and messaging with National Park staff

2019 Novel Coronavirus (COVID-19)

As the National Park Service monitors and responds to the COVID-19 pandemic, we work closely with the NPS Office of Public Health to use the latest science to guide our decision making.

Following the latest science and guidance from the Centers for Disease Control and Prevention, and to promote staff and visitors' safety, the NPS is requiring visitors, employees and contractors to **wear a mask** inside all NPS buildings and in crowded outdoor spaces, regardless of vaccination status or community transmission levels.

www.nps.gov

- Links to COVID-19 response information on every page



HOW IT WORKS

GET YOUR PASS

PLAN A TRIP



Hey fourth graders! See America's natural wonders and historic sites for free.

LET'S GO!

www.everykidoutdoors.gov

1 Get your pass

Get and print fourth-grade passes to our national lands and waters.

FOURTH GRADERS

EDUCATORS



2 Plan a trip

It's a good idea to involve your parent or guardian in this.

START



3 Hit the road!

Enjoy national parks, lands, and waters for a full year. Leave only footprints. Take only pictures.



A few things to know

You need to print your pass and bring it with you when you visit. Electronic copies aren't accepted.

Your pass has a unique code. That means you can't copy it and give it to friends. Encourage your friends to get their own pass if they're in the fourth grade.

This program only provides passes for fourth graders.



Accessibility

Home

About ▼

Plan Your Visit ▼

News

What We Do

What You Can Do ▼

NPS.gov / Home

Our Commitment

The National Park Service is committed to ensuring that people with disabilities have equal opportunity to benefit from our facilities, programs, services, and activities, whether indoors or outdoors. Discover accessible features in parks and learn more about what we do to provide accessibility throughout the National Park System.

Access Pass

Physical/Mobility ▶

Blind/Low Vision

Deaf/Hearing Loss

Intellectual

Service Animals

Accessibility

that people with disabilities have equal opportunity to benefit from our facilities, programs, services, and activities, whether indoors or outdoors. Discover accessible features in parks and learn more about what we do to provide accessibility throughout the National Park System.



www.nps.gov/subjects/accessibility

Every park website has accessibility info

National Parks and Public Lands Legacy Restoration Fund

The National Parks and Public Lands Legacy Restoration Fund (Legacy Restoration Fund) established by the Great American Outdoors Act provides the National Park Service with up to \$1.33 billion each year for five years, or \$6.5 billion total, to address extensive and long overdue maintenance needs. The network of roads, trails, restrooms, water treatment systems, and other infrastructure in national parks is aging and of which it was designed.

GAOA Projects at a Glance

These projects provide a sample of those initiated in national parks throughout the country in 2021. See below for complete lists of 2021 and proposed 2022 National Park Service GAOA projects.

- ▼ Acadia NP Maintenance Facilities Repair
- ▼ Fort Vancouver NHS Barracks Building Rehabilitation
- ▼ Gateway NRA Shoreline Stabilization Structures Replacement
- ▼ Glacier NP Going-to-the-Sun Road Rehabilitation
- ▼ Theodore Roosevelt NP Scenic Loop Repair
- ▼ Yellowstone NP Historic Fort Yellowstone Buildings Rehabilitation
- ▼ Yosemite NP Transmission Line Repair and Replacement



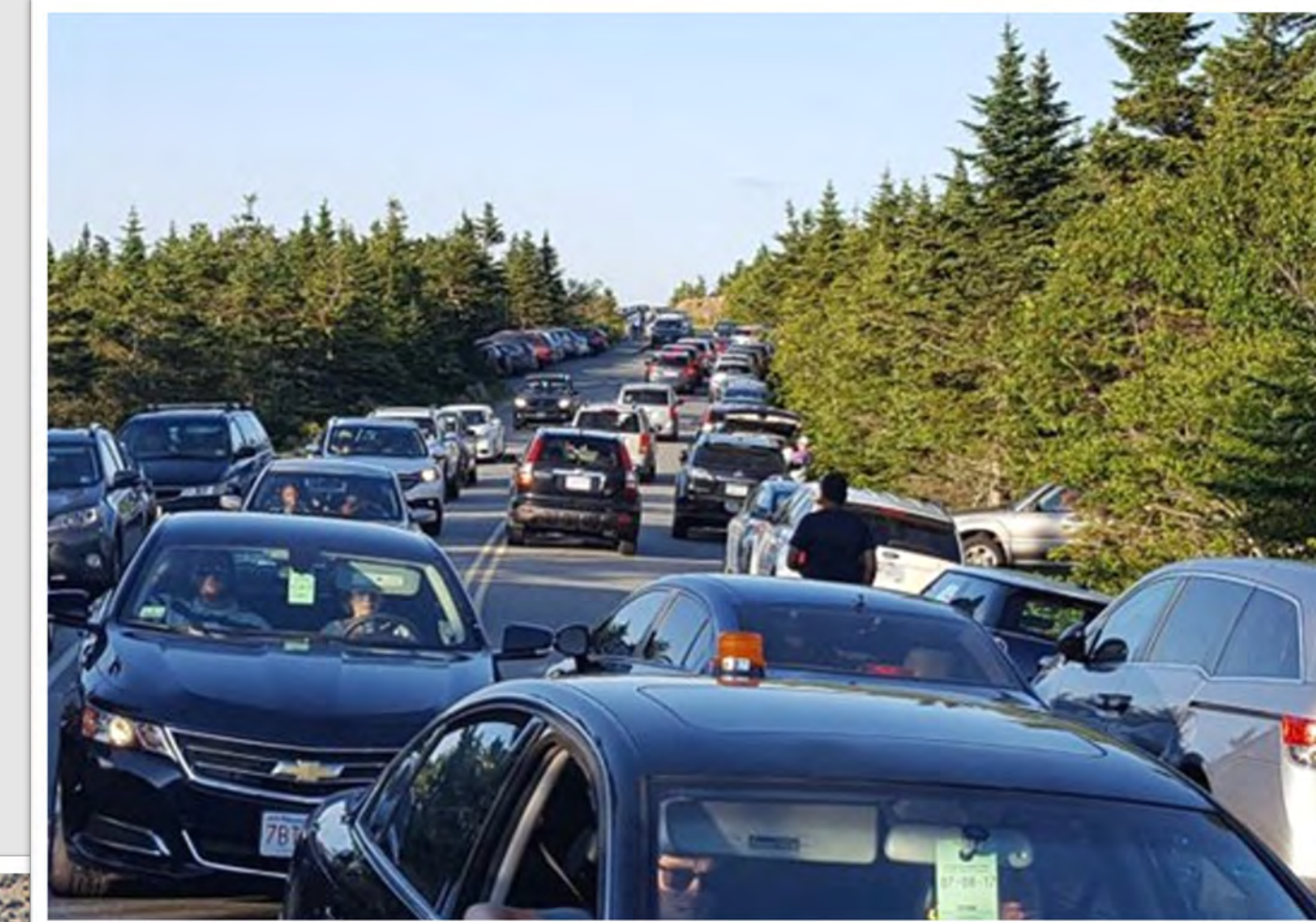
Improvements to railway tour bus staging area – Grand Canyon NP

www.nps.gov/subjects/infrastructure/legacy-restoration-fund

Thank you!
Donald_leadbetter@nps.gov



Visitor Management



NPR

National Park Gateway Towns Rethink Promotion Strategies

...

Most days by about 8 a.m., the gates at Arches National Park in Utah close because all the parking lots are full and the trails are at ...

2 weeks ago





Q&A

Destination  Analysts

miles
PARTNERSHIP

THE STATE OF THE AMERICAN TRAVELER: TRAVELER SEGMENTS 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



DISABILITY TRAVEL RESEARCH



THE STATE OF THE AMERICAN TRAVELER WITH DISABILITIES

Custom Research Summary
August 2021



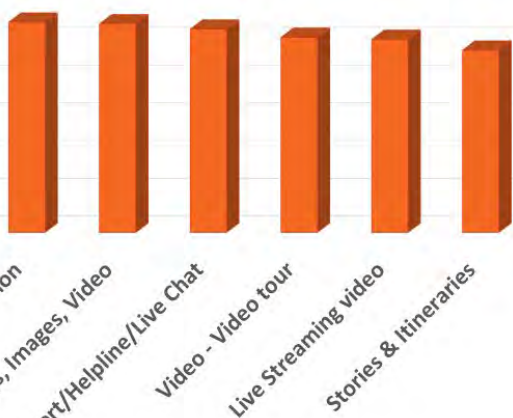
Specific Challenges Faced by: American Travelers with Disabilities

Challenges & Problems Travelers with Disability Face



American Travelers with Disabilities

Features as Extremely Useful/Critical or Useful



51%

average % rating this information and features as extremely useful/critical or useful

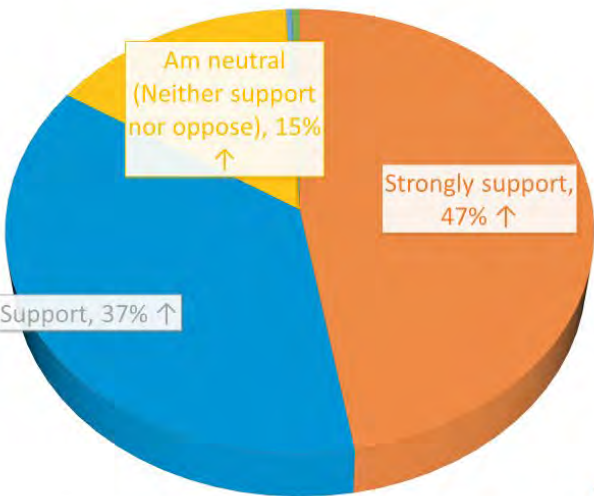
68%

have encountered problems or issues while traveling



Support for Improved Services & Facilities: All US Travelers

NEED FOR IMPROVED FACILITIES & SERVICES FOR AMERICAN TRAVELERS WITH DISABILITIES



84%

of ALL U.S. travelers support investing in improved facilities and services for travelers with disabilities



Q: Is there a need for improved facilities and services from destinations and/or tourism businesses to make it easier for travelers with a disability to travel? Sample size: n = 2,409

www.MilesPartnership.com/TravelAbility





UPDATED FUNDING FUTURES

- Updated survey of DMOs
- Updated recovery funding summary
- New travel and economic forecasts
- **NEW:** Regenerative tourism funding
- Learn more at MilesPartnership.com/FundingFutures



October 26, 2021 - Funding Forum at Destinations International's Advocacy Summit

<https://destinationsinternational.org/event/advocacy-summit>



Katarina Thorstensson,
Göteborg & Co, Sweden



Sigríður Dögg Guðmundsdóttir
Visit Iceland



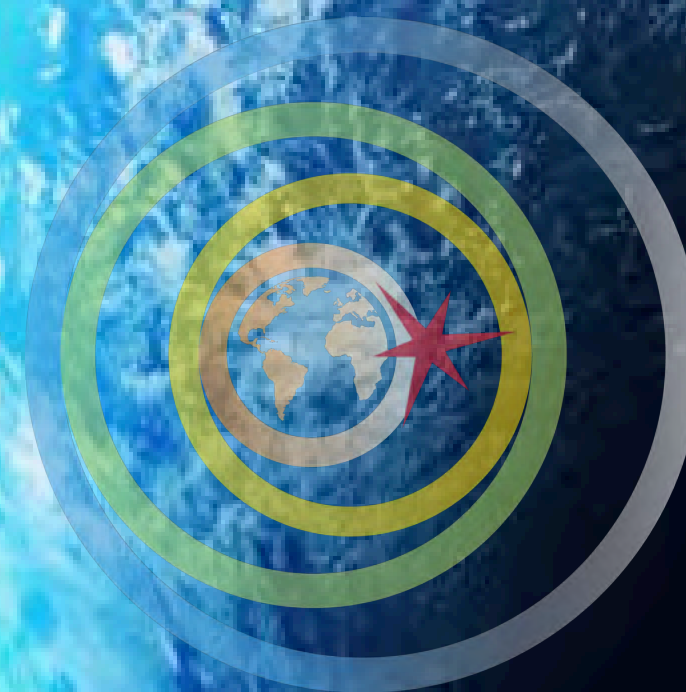
Chang Chee Pey
Singapore Tourism Board



Rolando Aedo
*Greater Miami
Convention & Visitors
Bureau*



Jay Burress
Visit Anaheim



GLOBAL ALL-STARS 2021

www.MilesPartnership.com/GAS

Q&A

Thank you!

Destination  Analysts

miles
PARTNERSHIP