THE STATE OF THE AMERICAN TRAVELER: TRAVELER SEGMENTS EDITION

SEPTEMBER 2, 2021

Destination Analysts







With You



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Donny Leadbetter Tourism Program Manager National Park Service

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

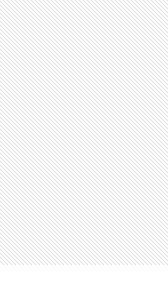
Check out the Online Insights Dashboard, Available Now!

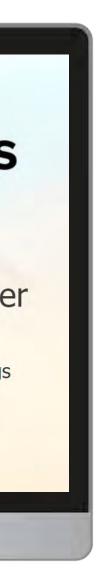
nstructions fo Destination miles unctions & Feature Analysts The State of the American Traveler Dynamic Dashboard of Findings Updated May 2021













Current Traveler Sentiment Traveler Segments Edition Research National Parks Travelers Outdoor Enthusiasts Likely International Travelers **Interview with Donny Leadbetter, National Park Service Additional Resources** Q&A

Destination Analysts

PARTNERSHIP



THE STATE OF THE AMERICAN TRAVELER

Segments Edition, 2021









The State of the American Traveler



Destination 💠 Analysts

The Technology Edition

THIS EDITION of The State of the American Travellet's taken eatigns), new shouthers in the apart, we have possible a sering inclination address and in the ball a resolution for seven her the unsue of mobile state) for a travel. Starting with this mathem we seemine (or the seven of the linearing bias are metrics of both. As always, before we bring these manifesting relation topics, the heppels searching to and both in travelation the test which sometics to about searching to the factor provided optimizers which sometics to about searching to the factor travelation the test which sometics to about searching to the factor the searching relation which sometics to about searching to the factor to available to the second second searching to the searching to the factor the searching to the second second second second second to the second topics of second second second second second second second second topics of second second second second second second second second second topics of second second second second second second second second second topics of second topics of second secon adaption graditors and there do not this a variety of rever technological scalinger and how travelers too and feel about them of algoing our hope is to provide data that helps (is 240 commonly emprove theward, if you have consigned as interaction for betwee servery logics, we vanceme you to reaserpt our (of systemic technic technic technic technic of systemic technic technic technic technic of systemic technic technic

📉 info@destinationanalysts.com 🏼 💆 @DA_Research

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• Survey invitation sent to a nationally representative sample of US adults

The State of the American Traveler, Segments Edition, Destination Analysts, Inc. Summer 2021

- Quarterly online survey conducted since 2006
- Data collected in mid July 2021
- Examines traveler sentiment, motivations & behaviors

Total sample of 2,000 American leisure travelers



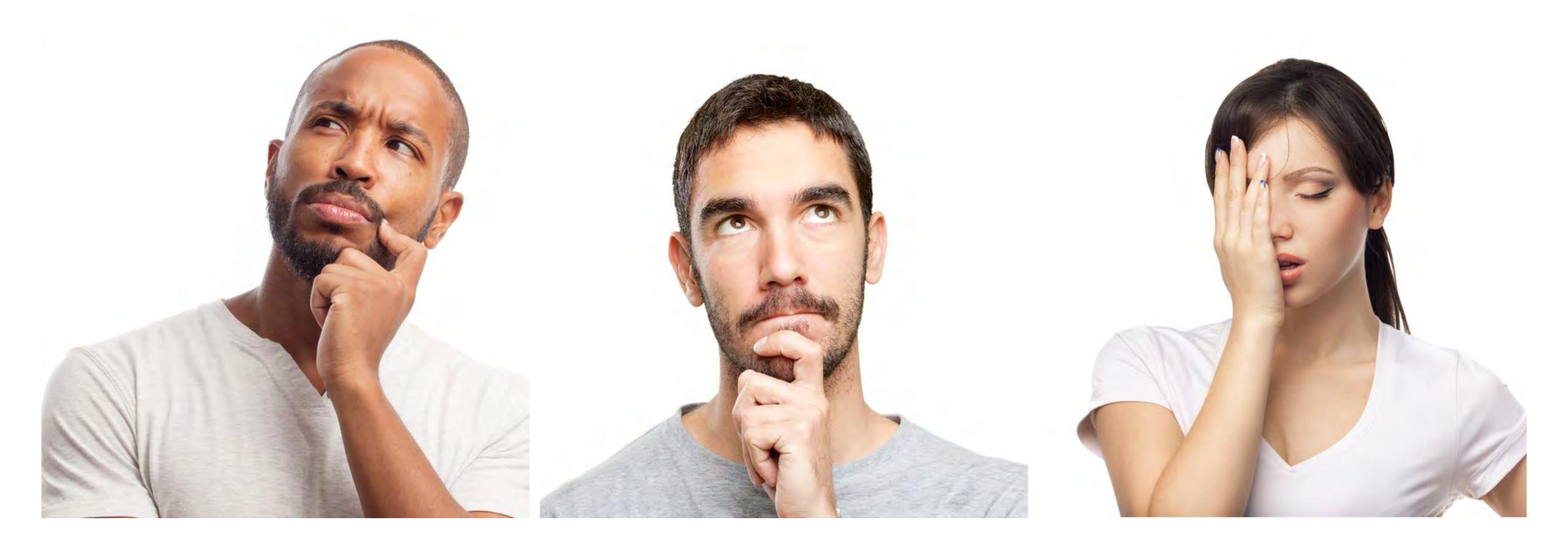
AGENDA

Three

Segments

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

Traveler optimism and expectations



CURRENT TRAVELER SENTIMENT



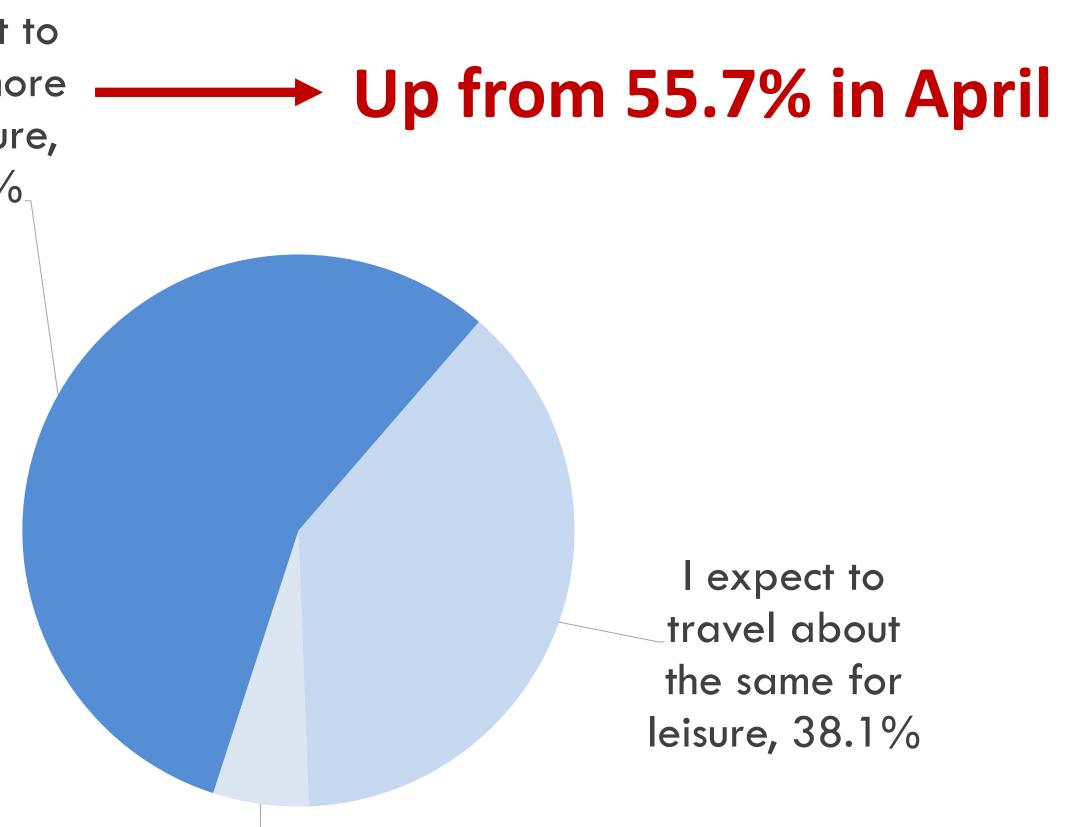
Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?

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)

l expect to travel more for leisure, 56.4%





I expect to travel less for leisure, 5.6%





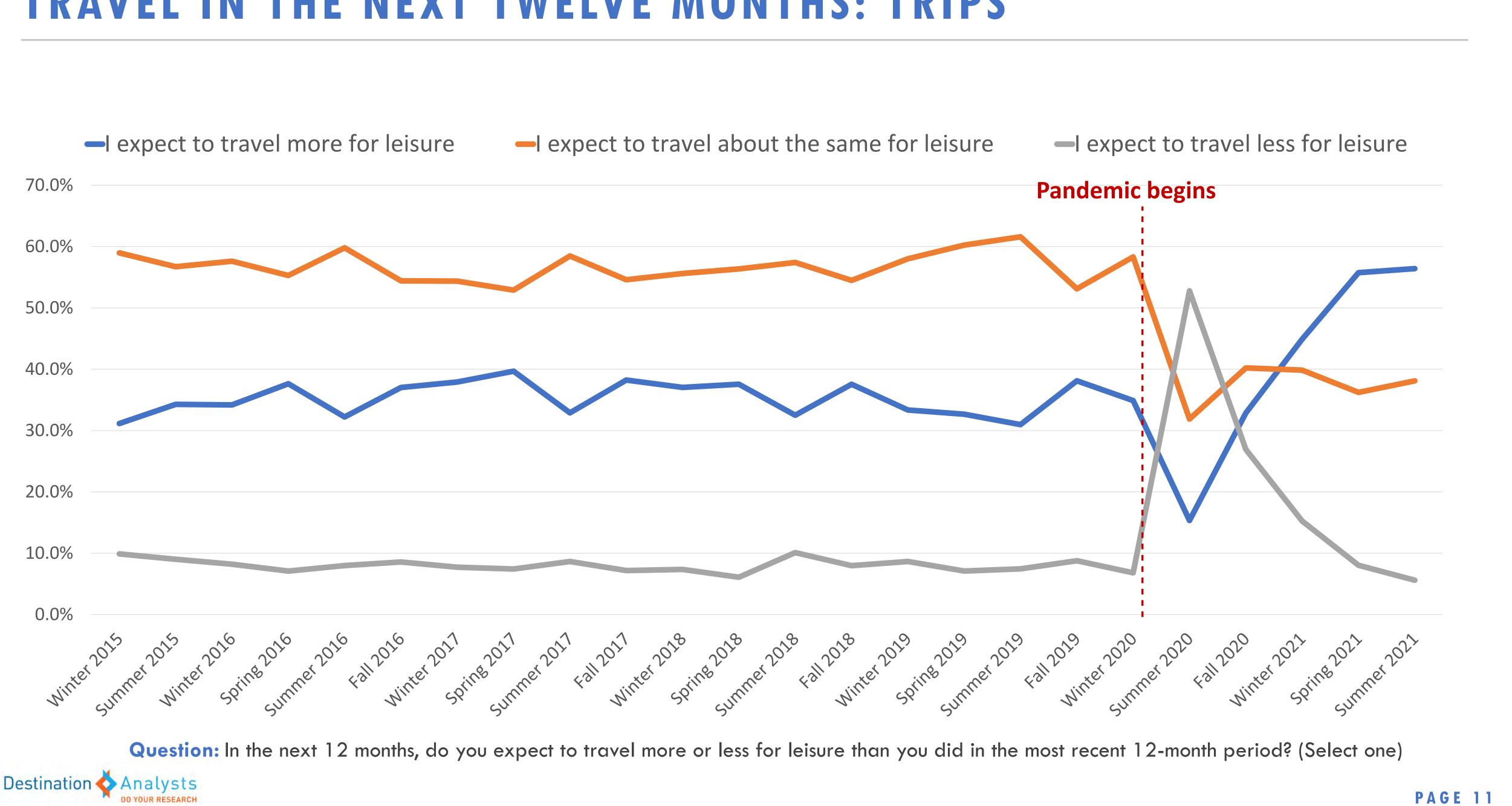




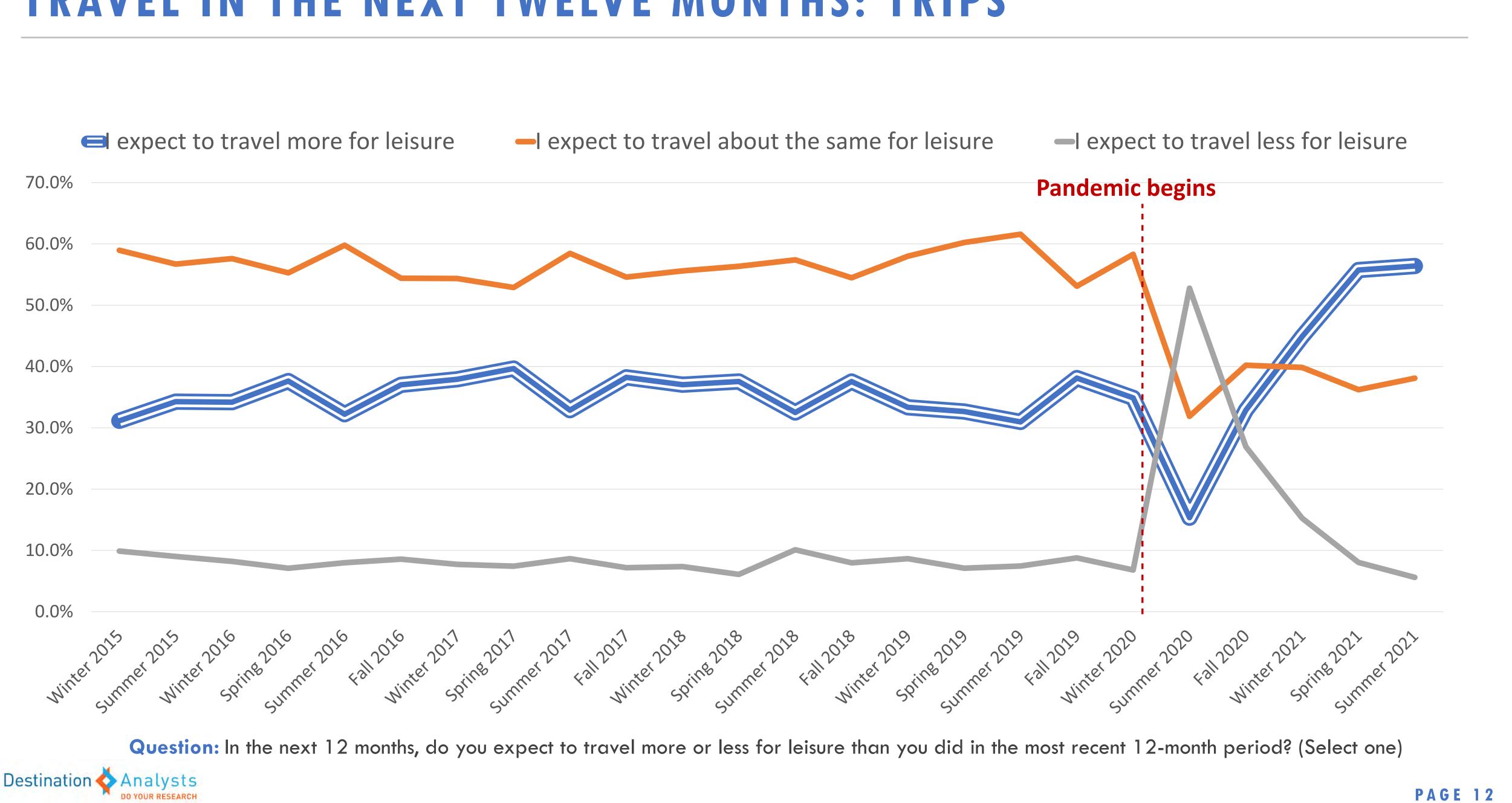


TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS

O YOUR RESEARCH



TRAVEL IN THE NEXT TWELVE MONTHS: TRIPS









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

way for purely leisure or personal reasons?





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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?

TRAVEL

MEXICO

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REAL

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?**

Over \$4000

\$3501 to \$4000

\$3001 to \$3500

\$2501 to \$3000

\$2001 to \$2500

\$1501 to \$2000

\$1001 to \$1500

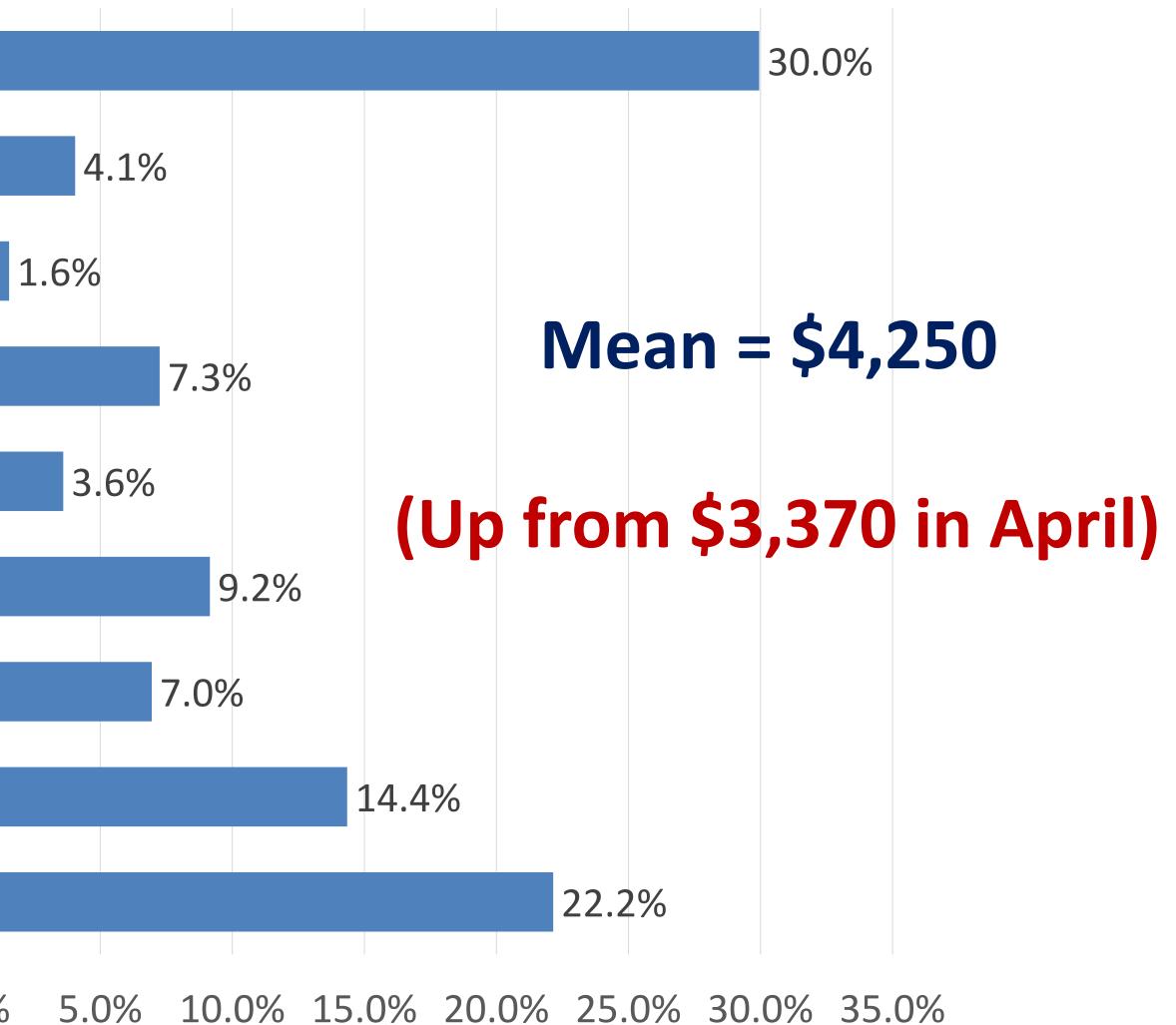
\$501 to \$1000

Zero to \$500

0.0%









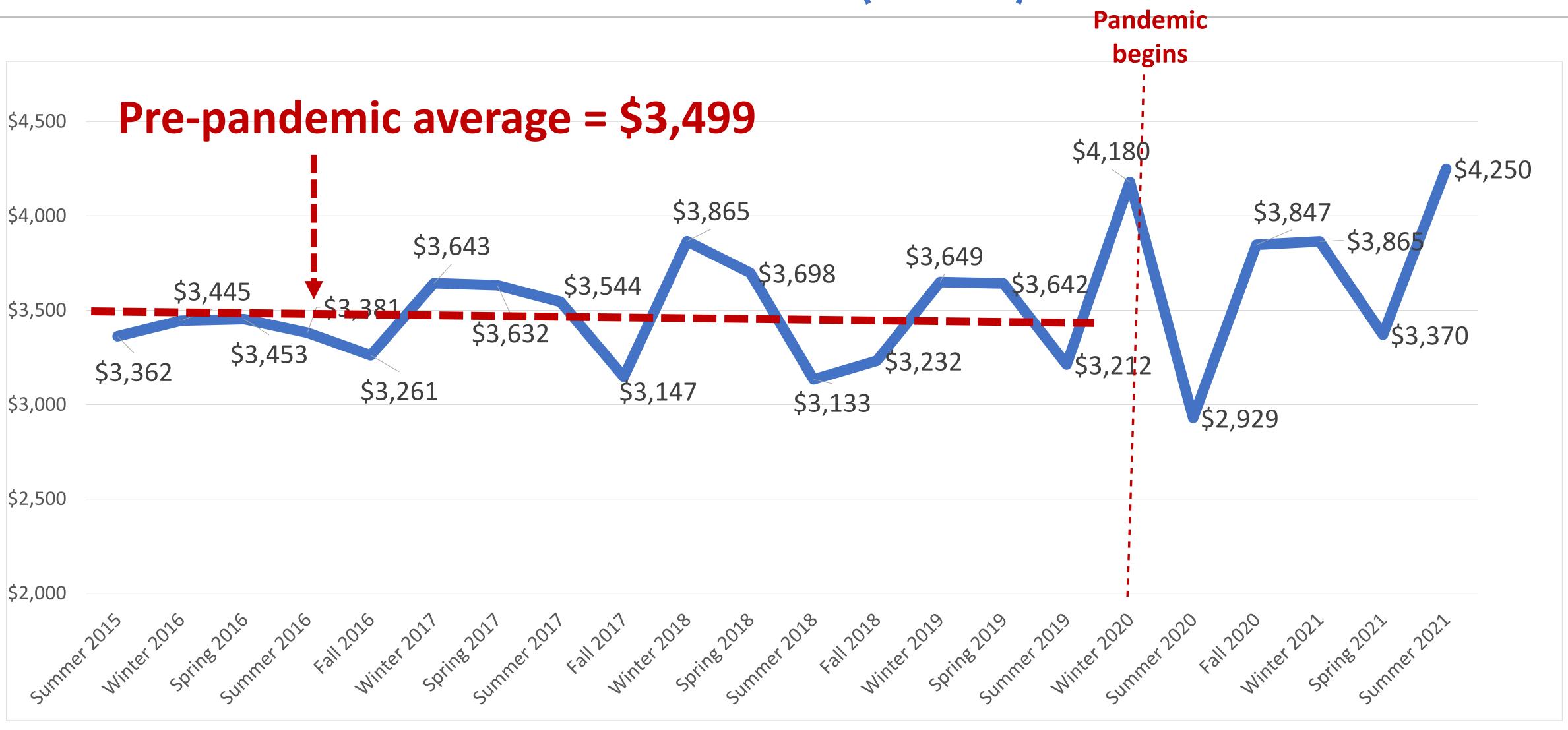








MAXIMUM LEISURE TRAVEL BUDGET (MEAN)



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.



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LEISURE TRAVEL AS A SPENDING PRIORITY

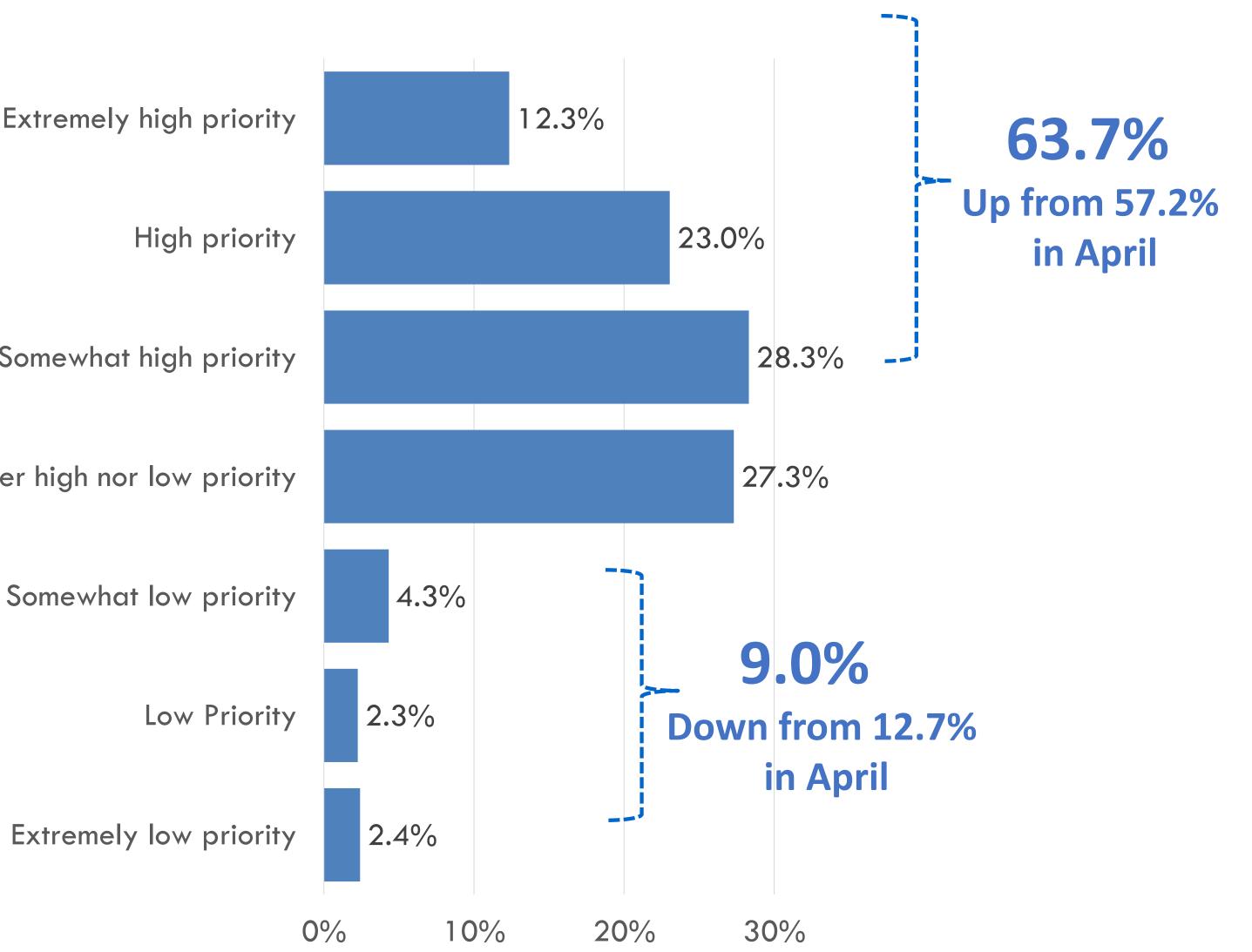
Question: Thinking carefully	
about how you expect to	Extremely high prio
spend your income in the	High prio
NEXT 12 MONTHS, please use	
the scale below to describe	Somewhat high prio
your spending priorities in	Neutral - neither high nor low prio
next year.	

Leisure travel will be a

Low Priority

Extremely low priority









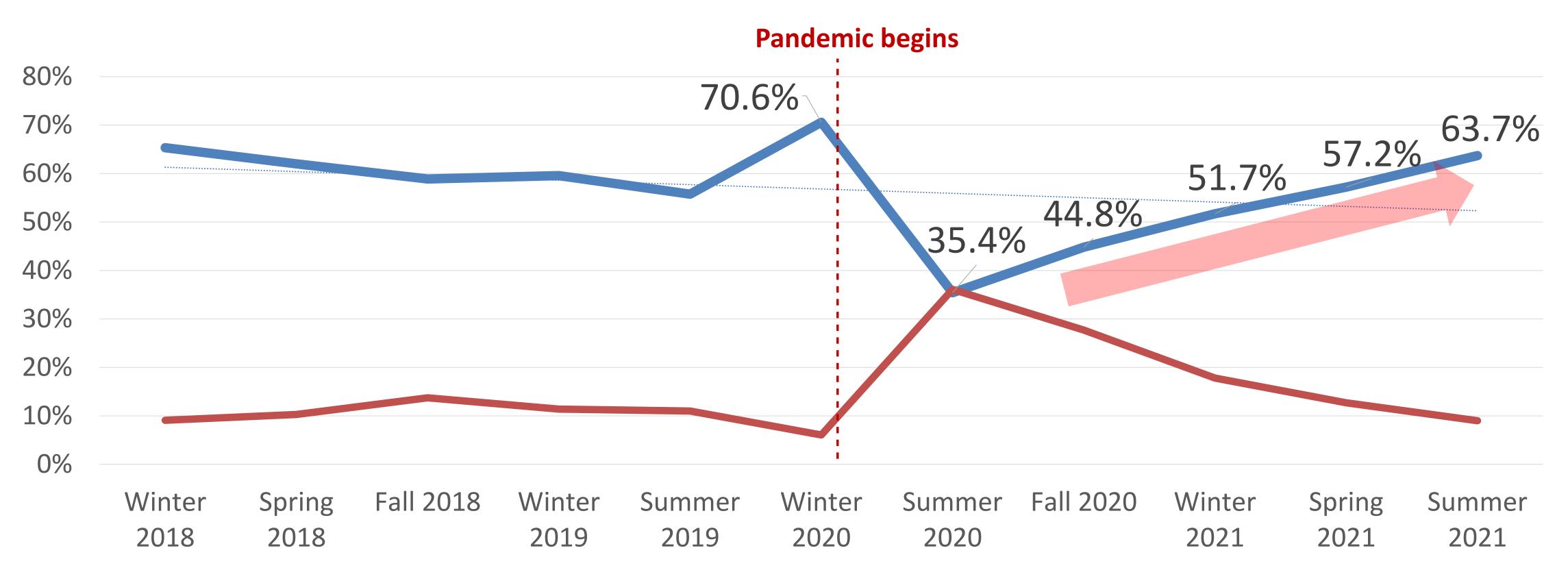






LEISURE TRAVEL AS A SPENDING PRIORITY

Top 3-Box Score (High Priority - Any level)



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.



Bottom 3-Box Score (Low priority - Any level)









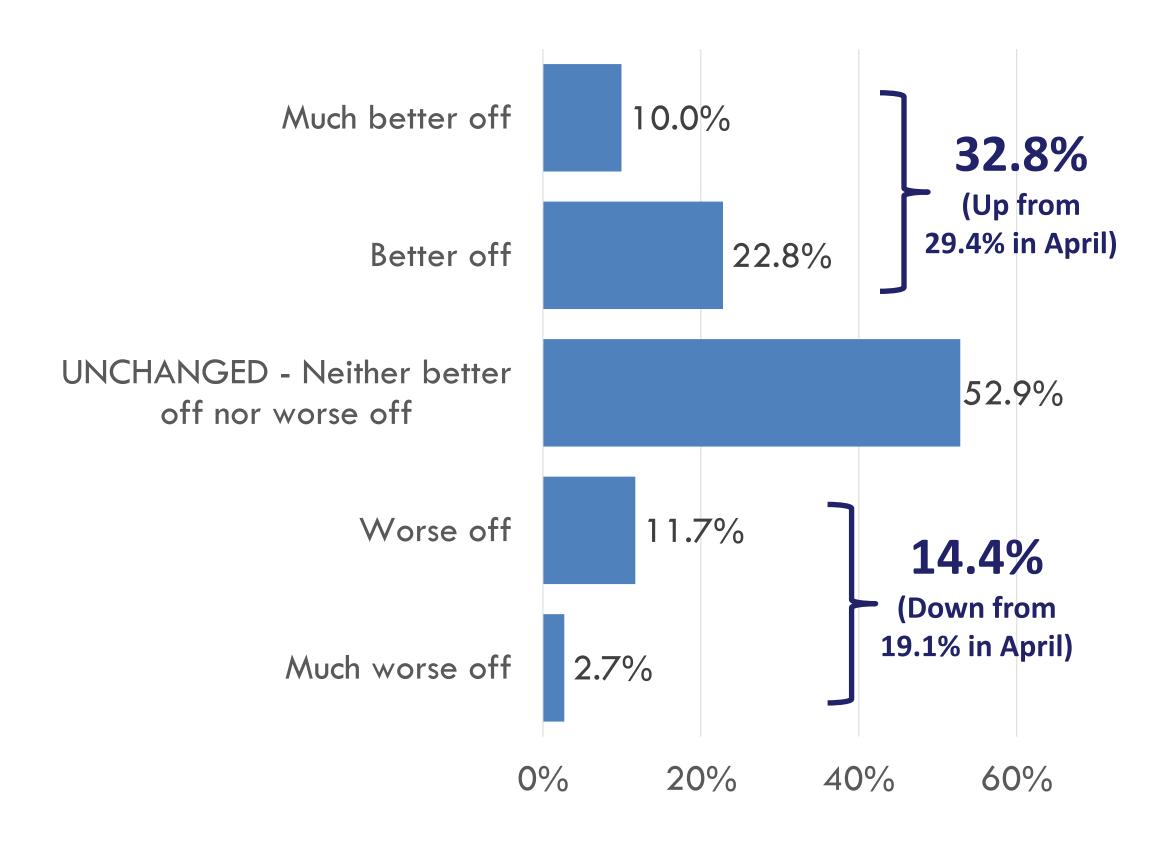






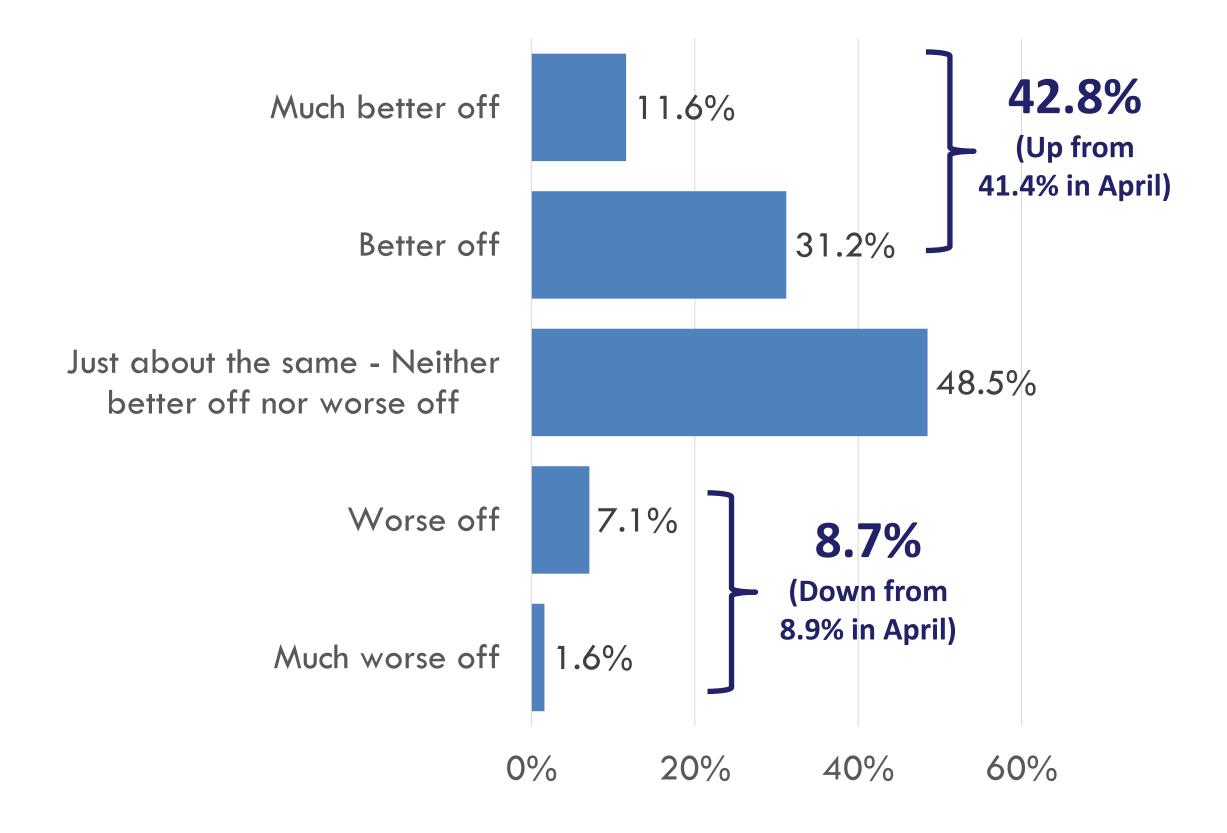
HOUSEHOLD FINANCES

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?







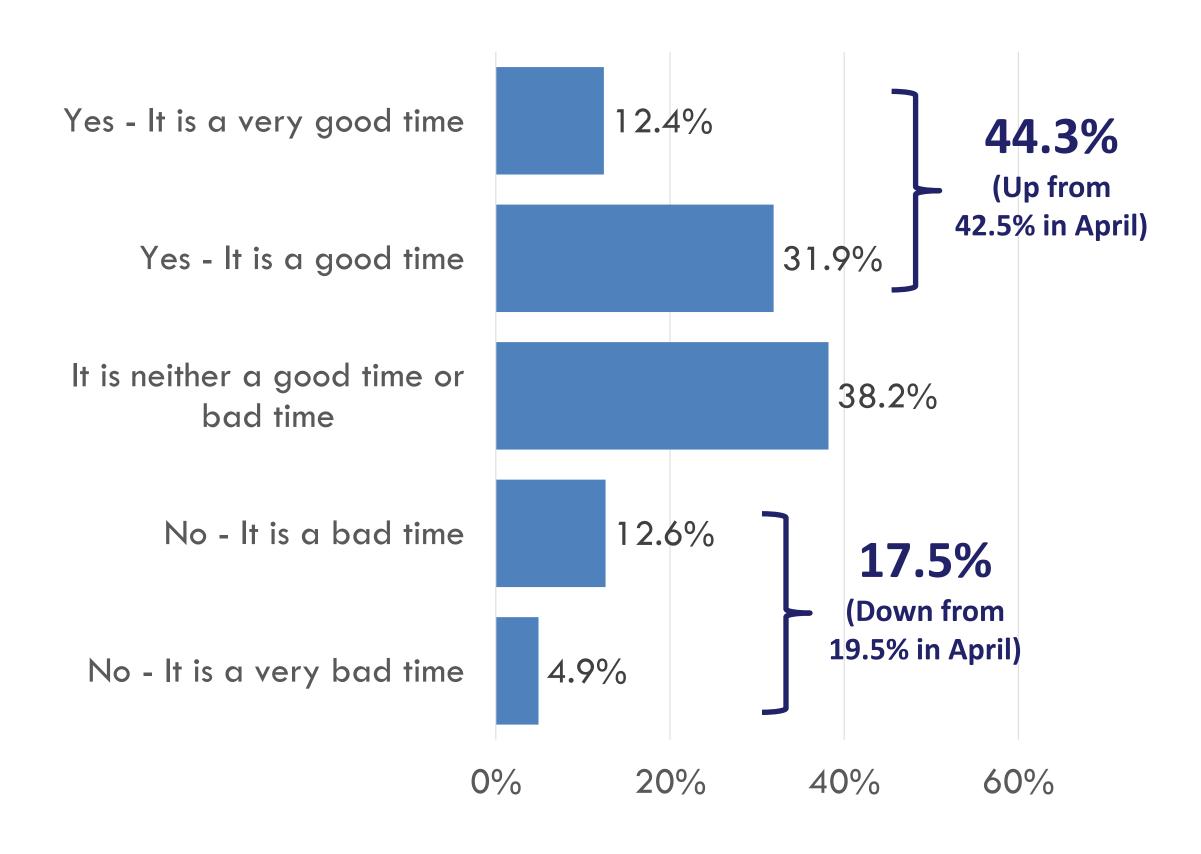






HOUSEHOLD FINANCES

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)

















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.)

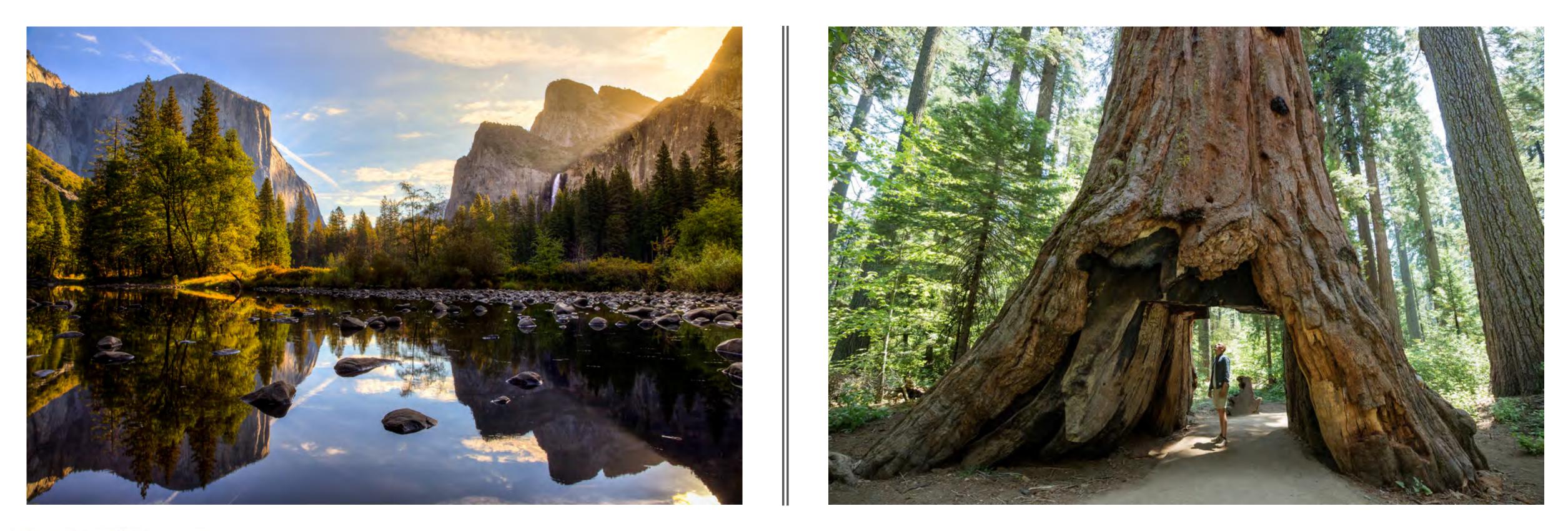
The number past year haverage.

The importance of lleisure travel in traveler budgets has improved consistently since the summer of 2020.

The financial situation of American traveling households seem solid, with positive expectations for future earnings.

The number of leisure trips travelers report having taken in the past year has improved, but it is still below its historical

National Parks Travelers

















HOW MANY NATIONAL PARKS TRAVELERS ARE THERE?

Question: On any of

the leisure trip(s) you

took in the past year,

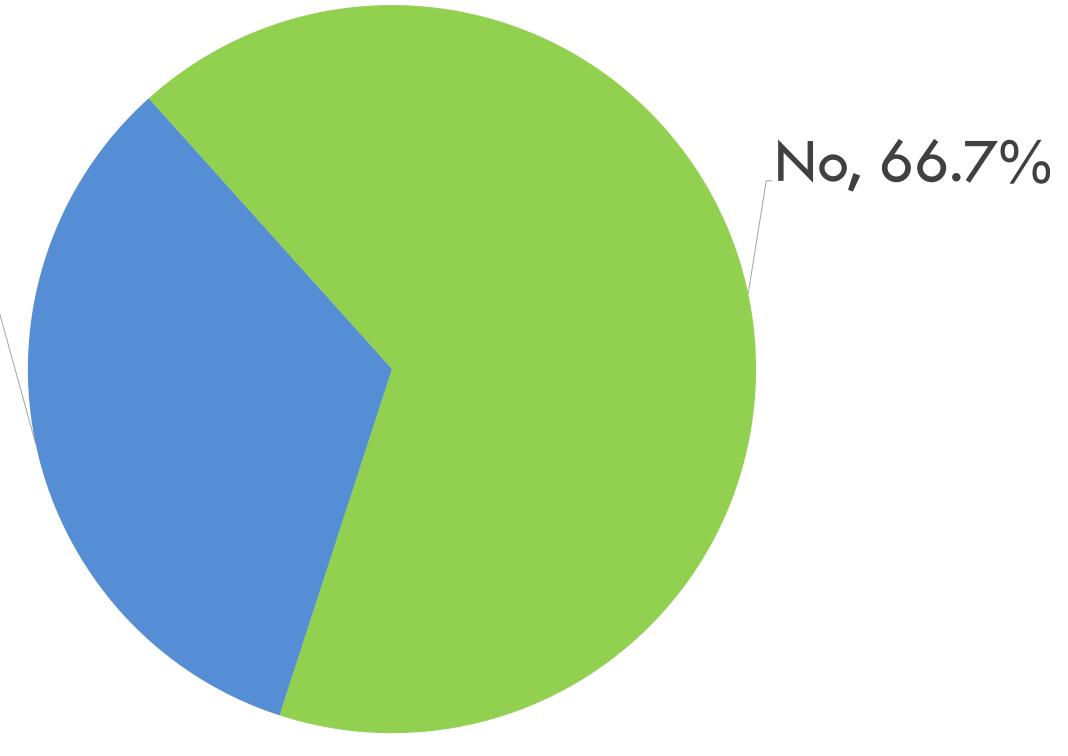
did you VISIT A

NATIONAL PARK OR

MONUMENT?









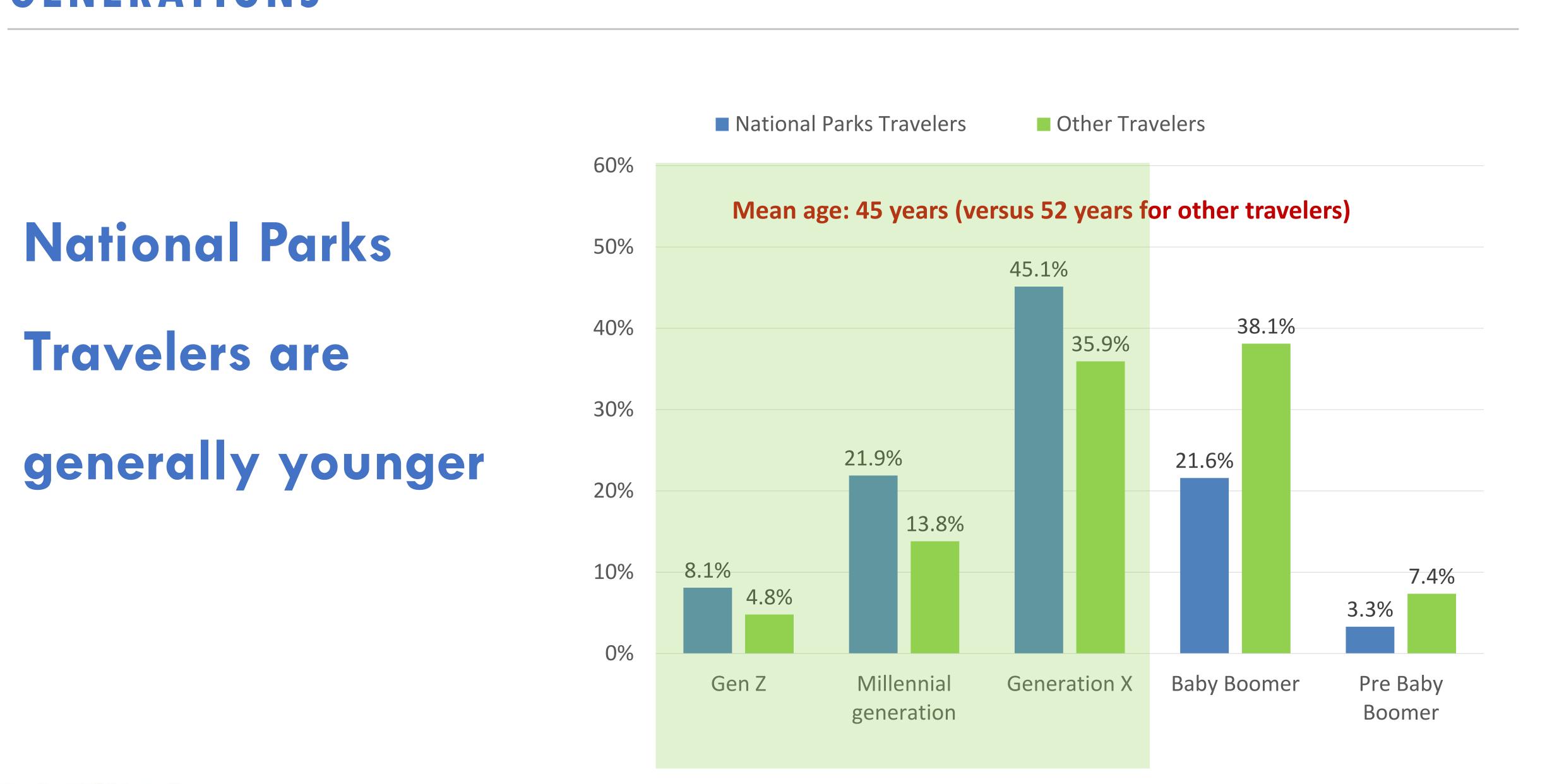








GENERATIONS









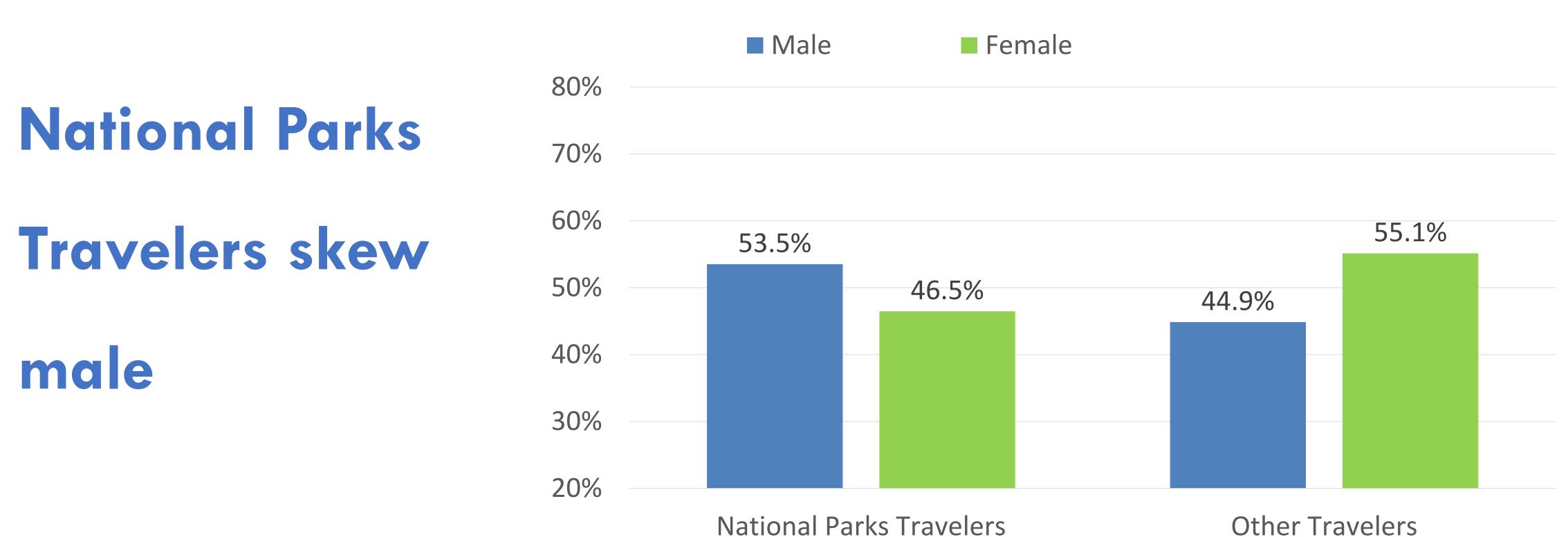








GENDER COMPARISON











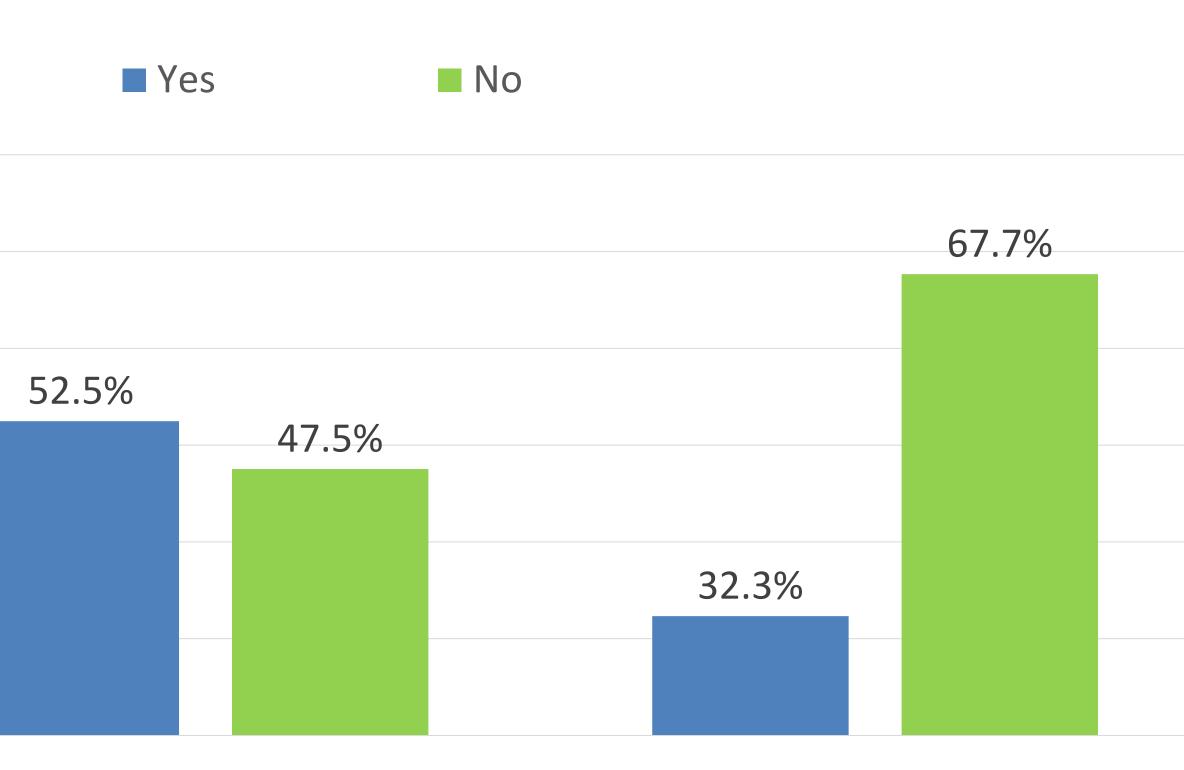




TRAVELS WITH CHILDREN

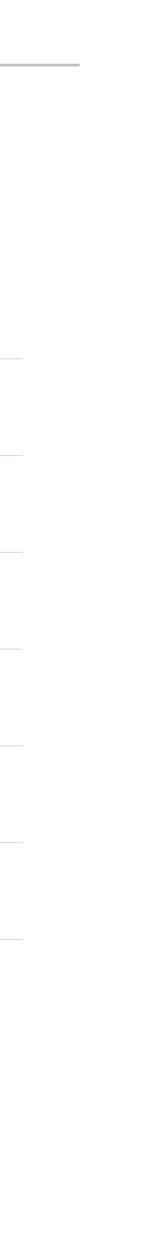
Question: On any of	80%
	70%
the leisure trip(s) you	60%
took last year, did	50%
you bring your own	40%
	30%
children?	20%





National Parks Travelers

Other Travelers











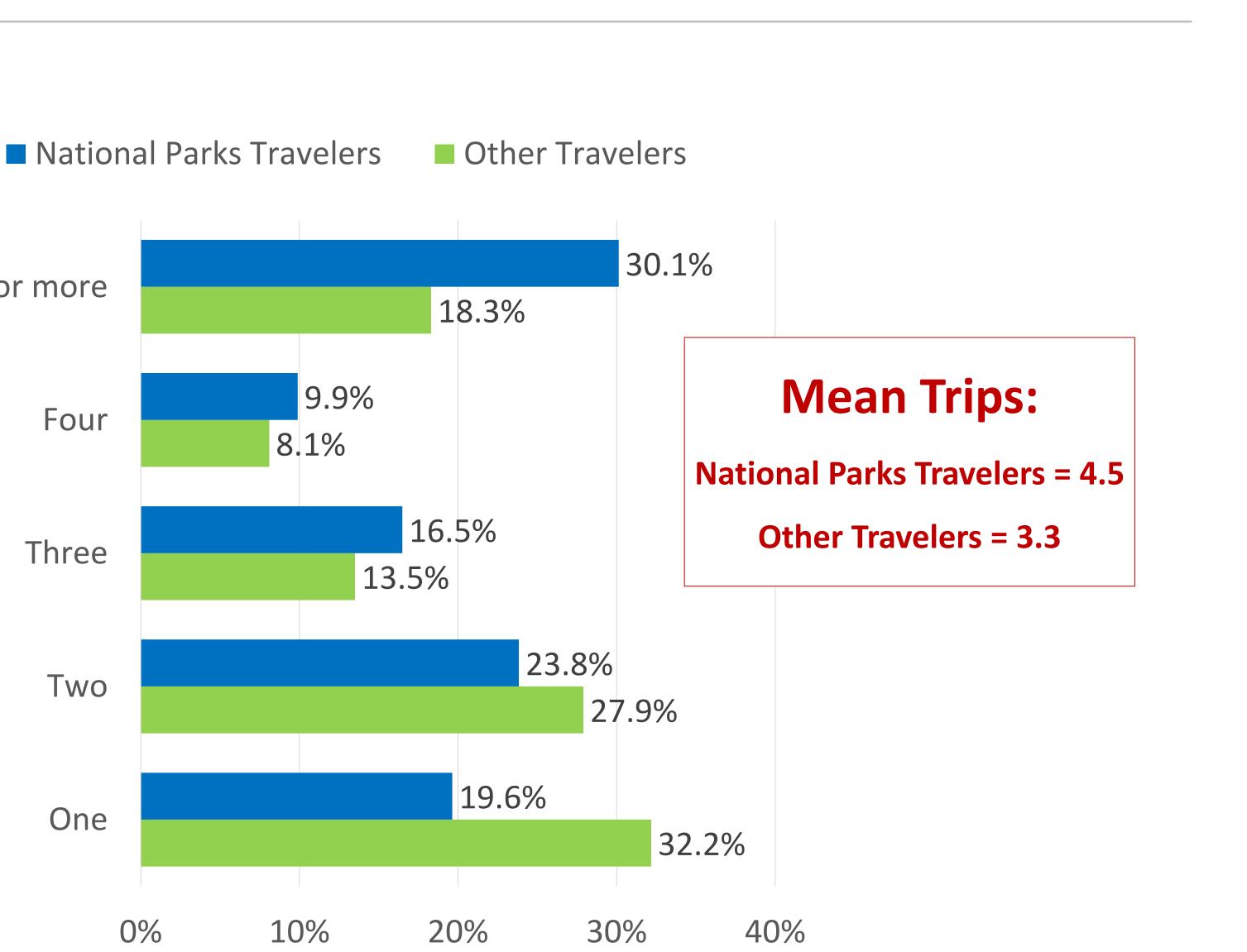
LEISURE TRIPS TAKEN IN PAST 12 MONTHS

Five or more **National Parks** Four **Travelers travel** Three more

Two

One





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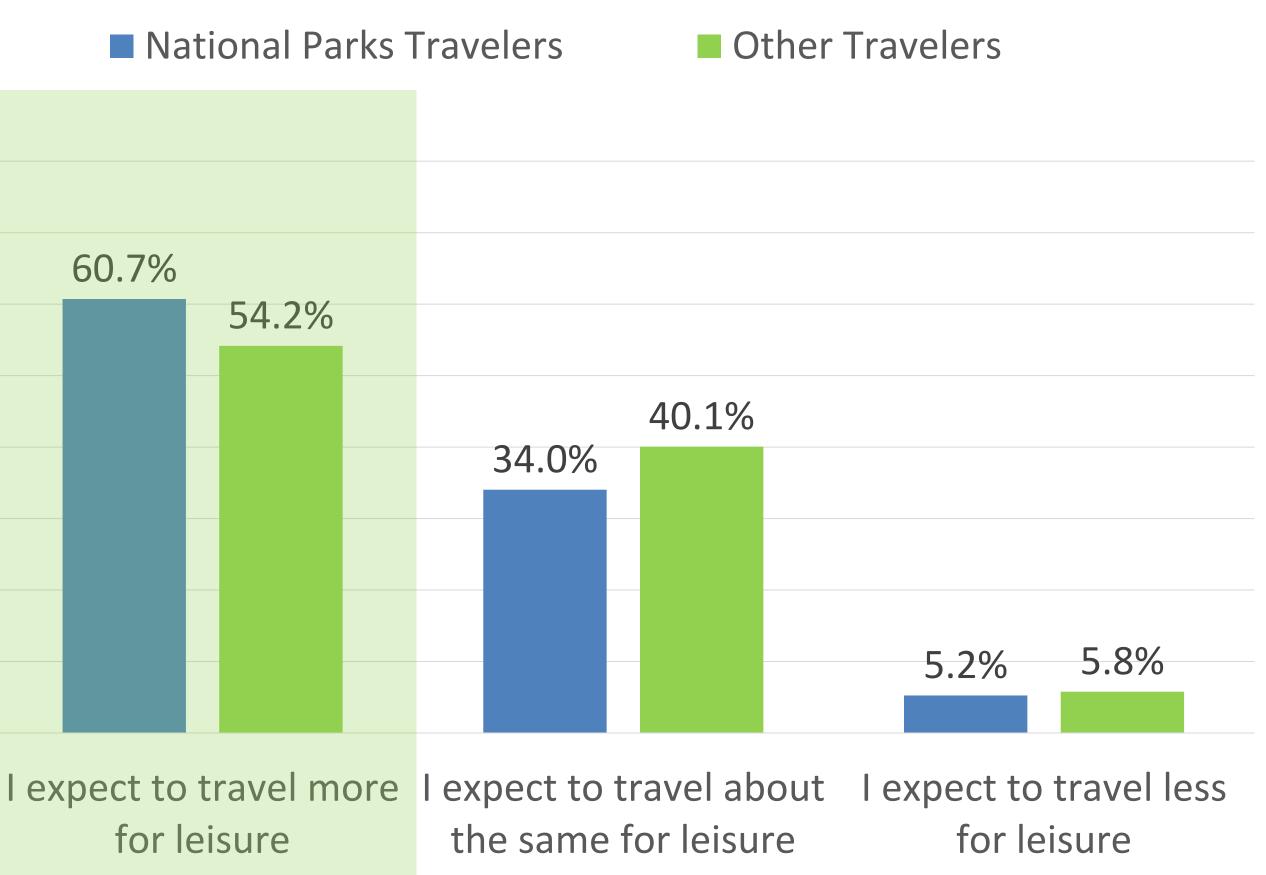




NATIONAL PARKS TRAVELERS ARE READY TO TRAVEL & SPEND

Question: In the next 12					
months, do you expect to	80%				
	70%				
travel more or less for	60%	-			
leisure than you did in the	50%				
ieisule mun yuu ulu mine	40%	_			
most recent 12-month	30%	_			
	20%	_			
period?	10%	_			
	0%	_			







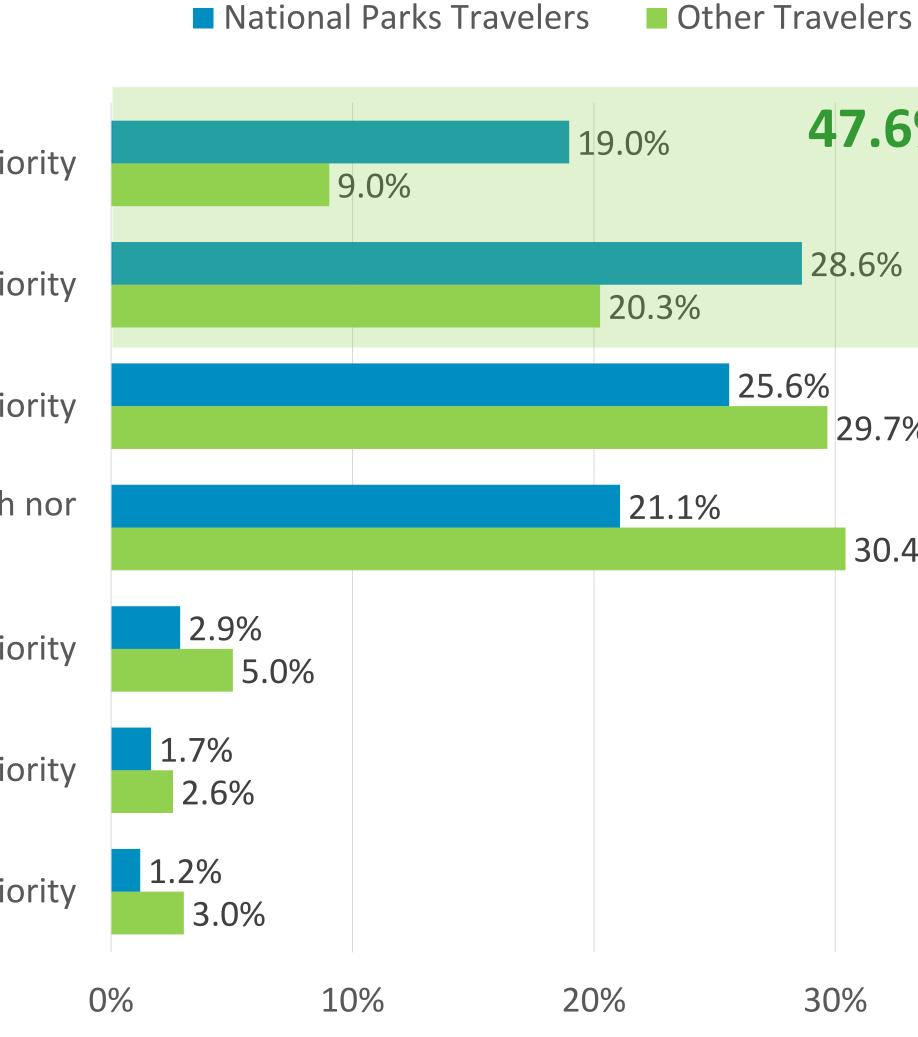








NATIONAL PARKS TRAVELERS: READY TO TRAVEL & SPEND



Extremely high priority

High priority

Somewhat high priority

Neutral - neither high nor low priority

Somewhat low priority

Low Priority

Extremely low priority



7.6% vs. 2	29.3%
8.6%	
29.7%	
30.4%	

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.

40%









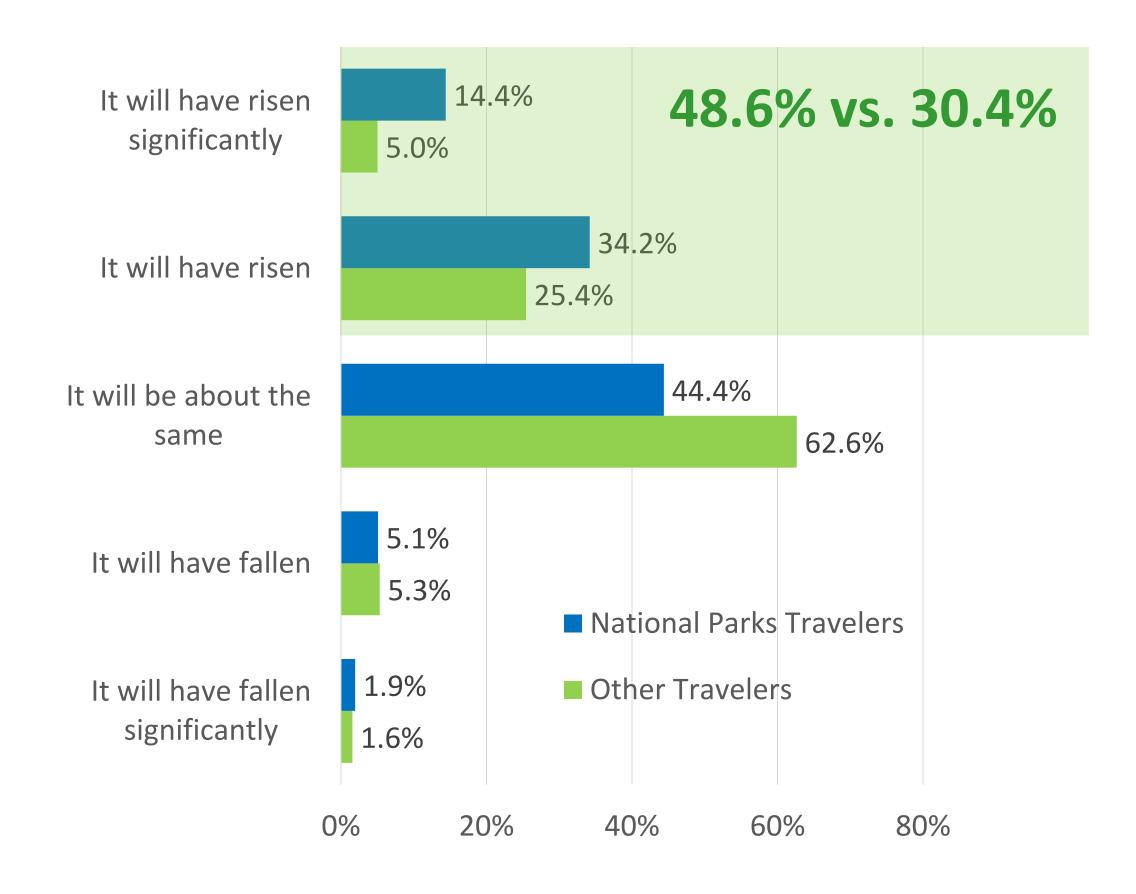






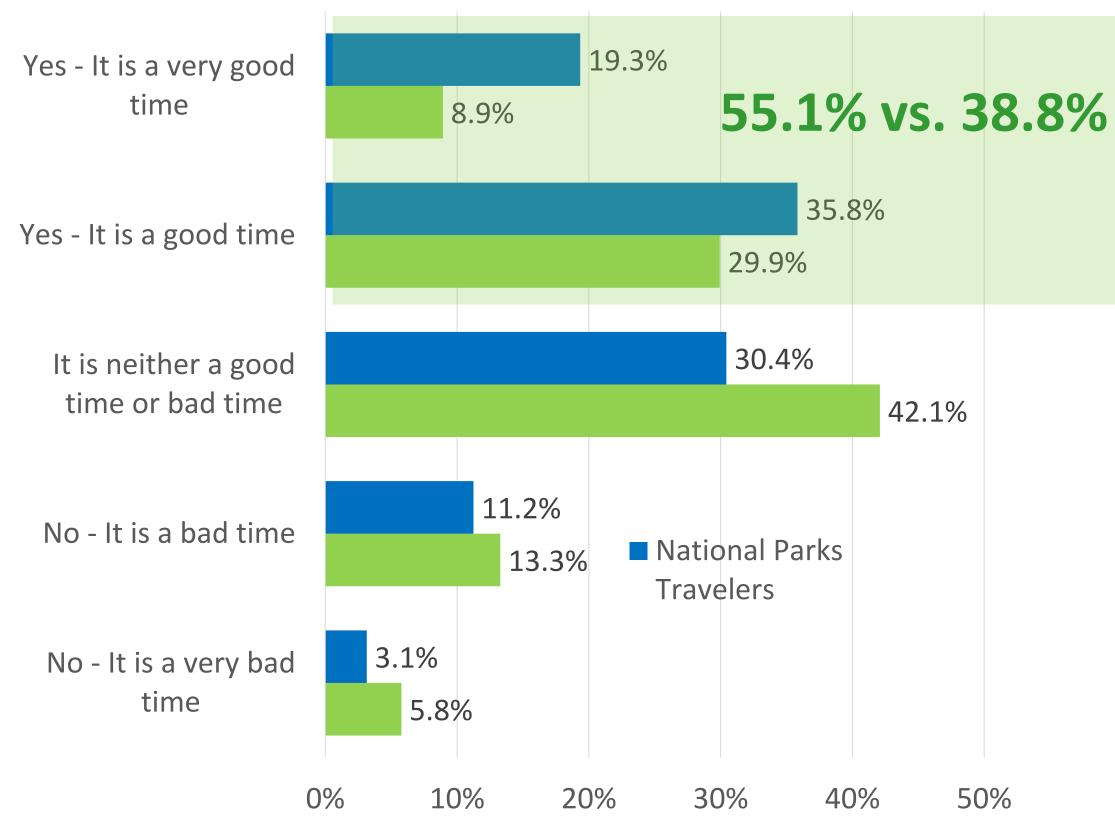
NATIONAL PARKS TRAVELERS: READY TO TRAVEL & SPEND

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

Hiking (da Enjoying theme or amuseme Phot

International travel (taking trips outside Musical concerts (pop, rock, hip hop, alternative, mode

Fitness, health and wellness (exercise, spas, yoga Canoeing, kayaking o Art n

Hiking (over-night on trail, long

Recreational vehic Theater or plays, (on or off Broadway prod Musical concerts (classical, symphon Music festivals (multi-day Crafting, DIY or creative Sailing or Video games - Video

Attending professional sports (large-venue, like NFL

Question: Tell us

about your hobbies

and passions.

Please use the scale

below to describe

your interest in each.



							1			
Food and cuisine		38.8	8%				25	5.9%		
s outside the USA)		28.7%			23.	8%				
Hiking (day hikes)		31.8%			17.	7%				
amusement parks		27.7%		1	.9.8%					
tive, modern, etc.)		28.5%		1	6.5%					
Camping	22	2.4%		21.2%	6					
Photography	2	4.9%		16.0%	6					
spas, yoga, organic		25.9%		14.89	%					
kayaking or rafting		27.1%		13.2	%					
Art museums		26.6%		13.29	%					
n trail, longer haul)		26.3%		11.5%						
Wine	2	.4.7%		12.5%						
onal vehicle travel	23	3.3%		13.4%						
dway productions)		26.1%		10.4%						
symphonies, etc.)	2	3.7%		12.0%						
(multi-day events)	22	2.1%	1	3.0%						
e, like NFL or MLB)	20.	2%	14	.6%						
r creative projects	23	3.1%	1	0.8%						
Sailing or boating	23	3.1%	1	0.4%						
nes - Video gaming	19.3	3%	14.	1%						
	0% 10	0% 20	%	30%	409	%	50	%	60%	%
High importance	e Pass	ionate ab	out							









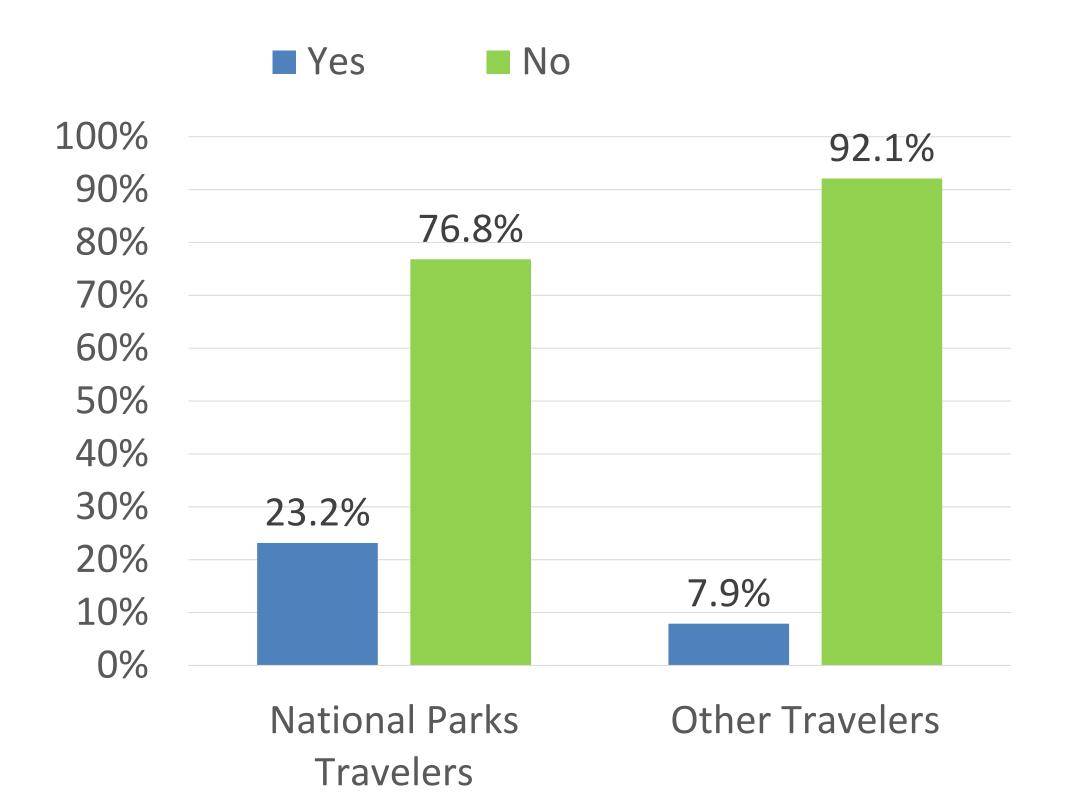






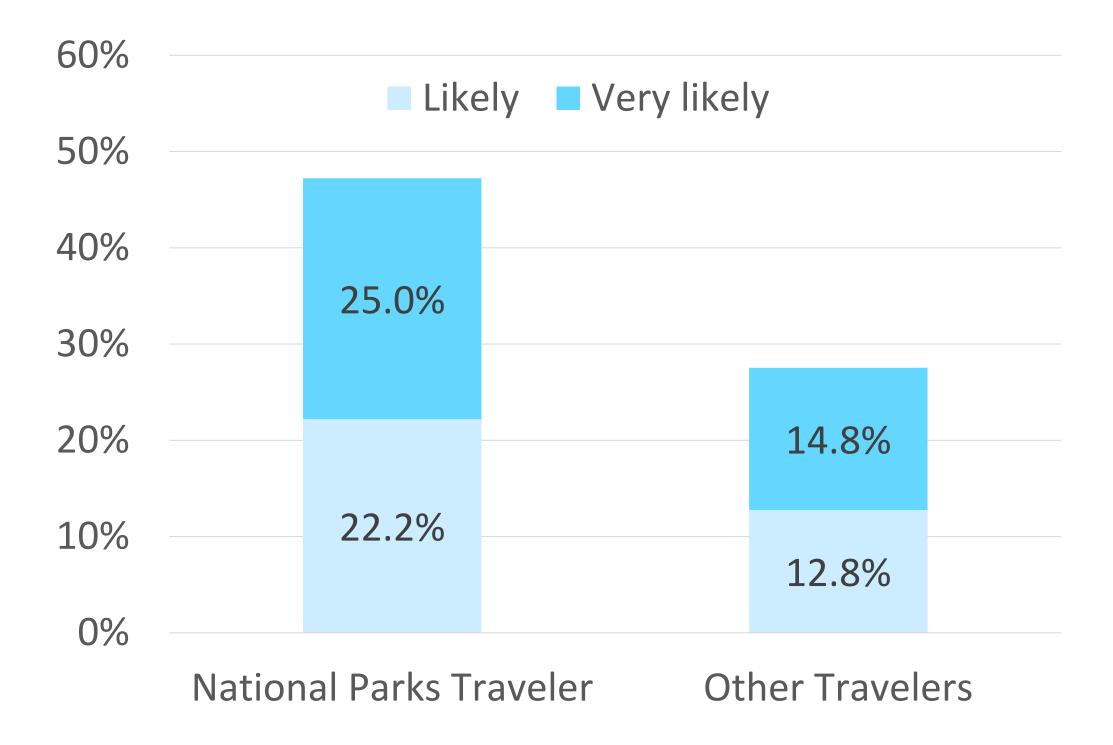
NATIONAL PARKS TRAVELERS: INTERNATIONAL TRAVEL







Next 12 Months













NATIONAL PARKS TRAVELERS: TRAVEL PASSIONS

Hiking (da Enjoying theme or amuseme Phote

International travel (taking trips outside t Musical concerts (pop, rock, hip hop, alternative, moder

Fitness, health and wellness (exercise, spas, yoga, Canoeing, kayaking o Art m

Hiking (over-night on trail, long

Recreational vehicl Musical concerts (classical, symphoni Music festivals (multi-day Crafting, DIY or creative Sailing or Video games - Video

Theater or plays, (on or off Broadway prod Attending professional sports (large-venue, like NFL

about your hobbies

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Food and cuisine	38.8	3%	25.9%		
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(multi-day events)	22.1%	13.0%			
e, like NFL or MLB)	20.2%	14.6%			
r creative projects	23.1%	10.8%			
Sailing or boating	23.1%	10.4%			
nes - Video gaming	19.3%	14.1%			
0	% 10% 20)% 30% 40	0% 50% 60%		
High importance Passionate about					











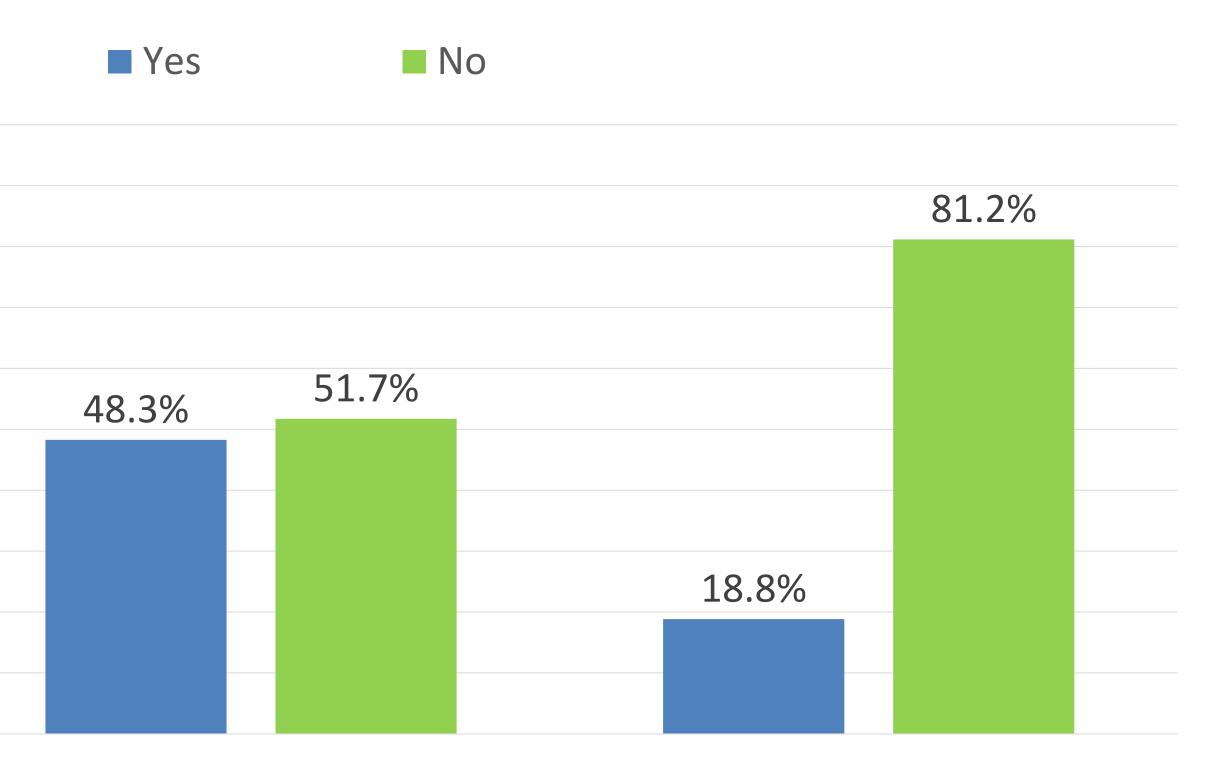




THEME OR AMUSEMENT PARKS (PAST 12 YEARS)

Question: On any of		
	100%	
the leisure trip(s) you	90%	
	80%	
took in the past year,	70%	
	60%	
did you VISIT ANY	50%	
	40%	
THEME OR	30%	
	20%	
A BALLCEBAENIT DA DIZCO	10%	
AMUSEMENT PARKS?	0%	





National Parks Travelers

Other Travelers





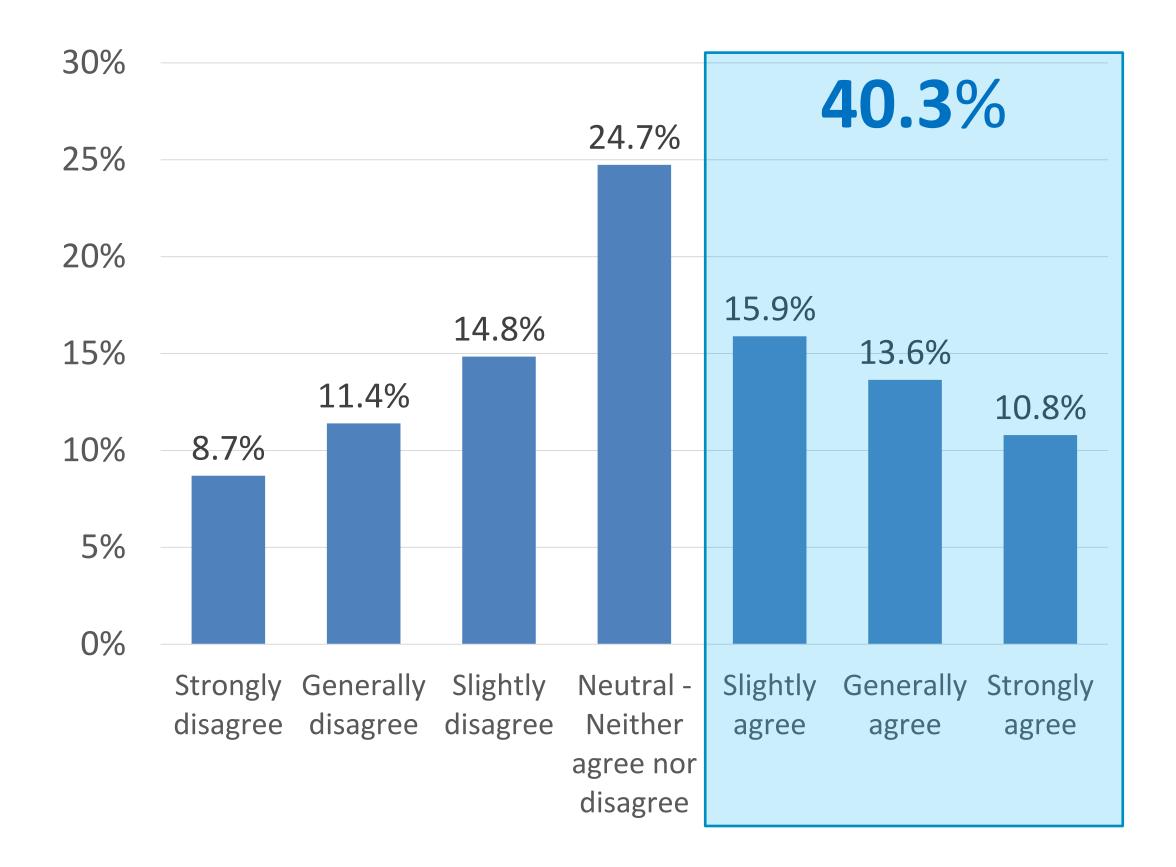






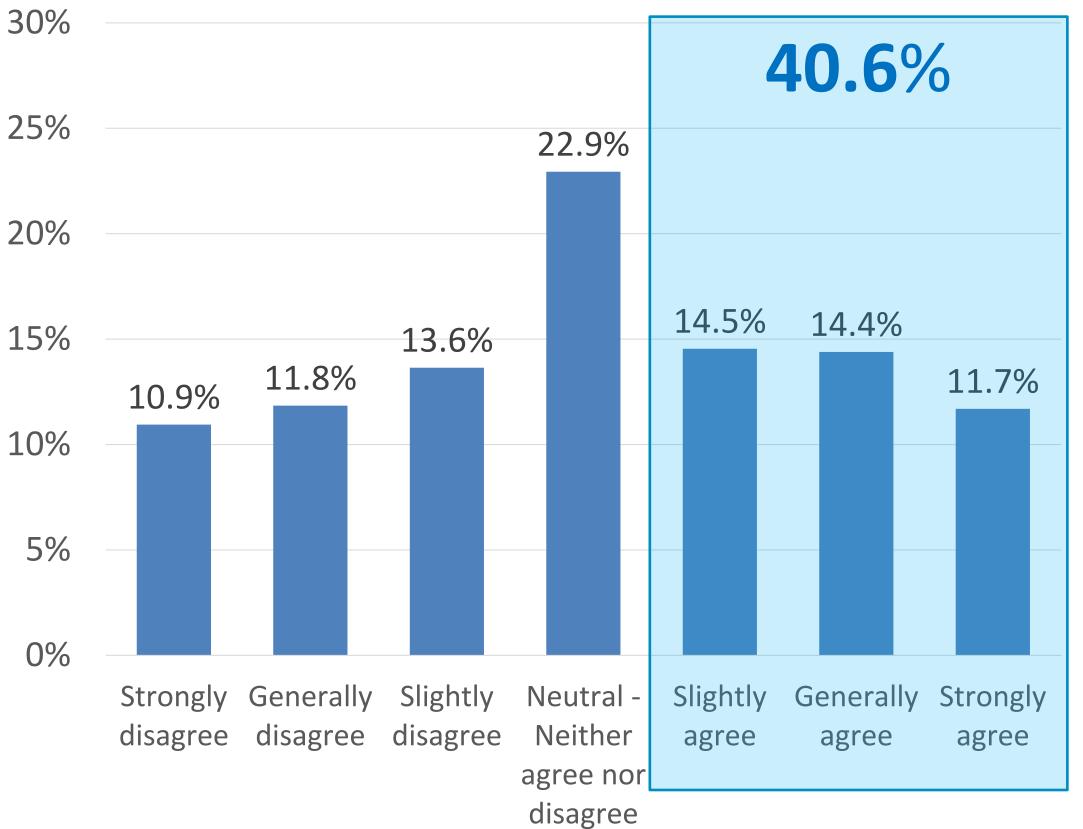
NATIONAL PARKS TRAVELERS: VARIED DESTINATION PREFERENCES

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.)









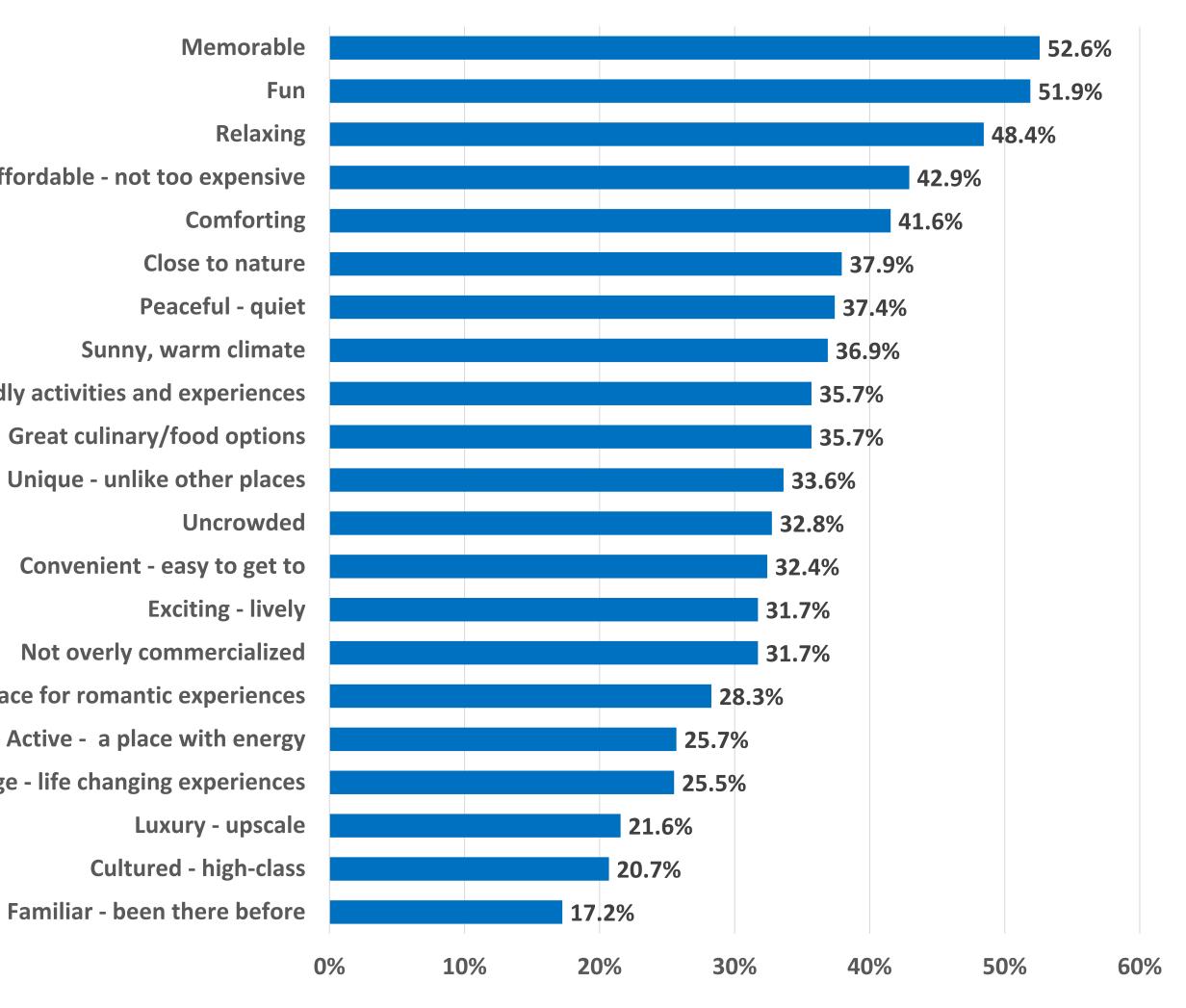




NATIONAL PARKS TRAVELERS: WHAT THEY'RE LOOKING FOR

Question: Please tell	Afforda
us how you want	Anorda
the places you visit	Family-friendly act
to be. How	Great Uniqu
important is each	Conv
attribute?	A place for Active A place for transformative change - life















NATIONAL PARKS TRAVELERS: WHAT THEY'RE LOOKING FOR

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

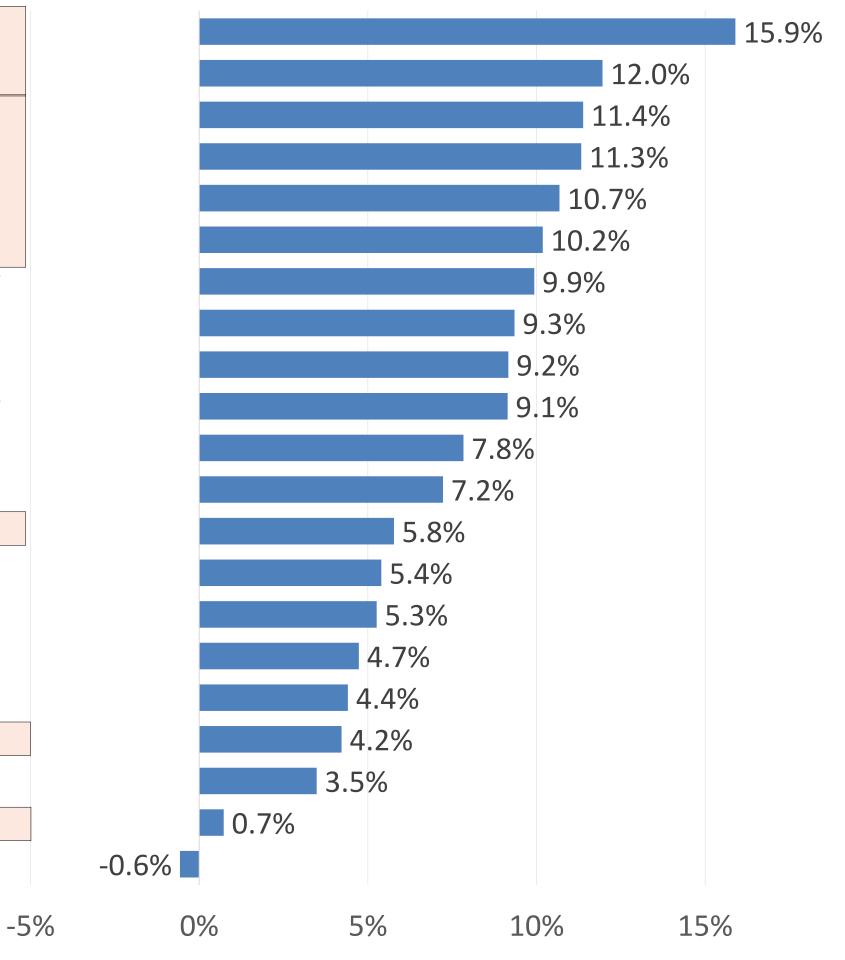
Question: Please tell

- us how you want
- the places you visit
- to be. How
- important is each

attribute?

Close to nature A place for transformative change - life changing experiences Luxury - upscale A place for romantic experiences Cultured - high-class Family-friendly activities and experiences Exciting - lively Comforting Unique - unlike other places Active - a place with energy Not overly commercialized Peaceful - quiet Memorable Uncrowded Great culinary/food options Familiar - been there before Convenient - easy to get to Relaxing Sunny, warm climate Fun Affordable - not too expensive













National Parks Travelers represent about one third of the traveling public, and tend to be younger, male and persons who travel with children.

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.

year.

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.

National Parks Travelers are typically doing well financially, with high expectations for their prospects in the upcoming



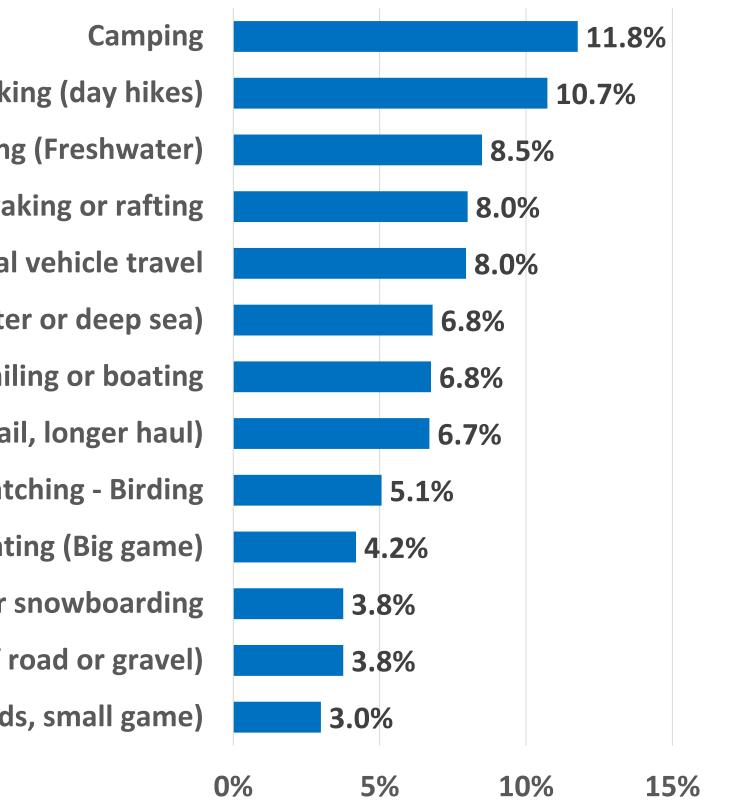
Outdoor Enthusiasts

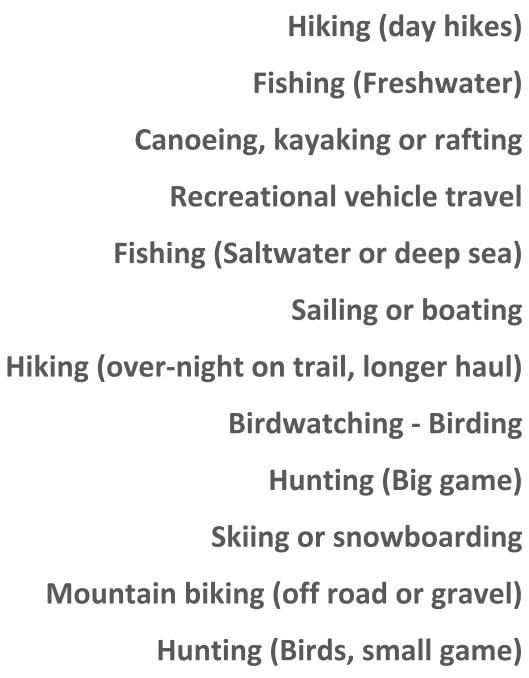
Travelers who have a passion for any of these activities

- 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

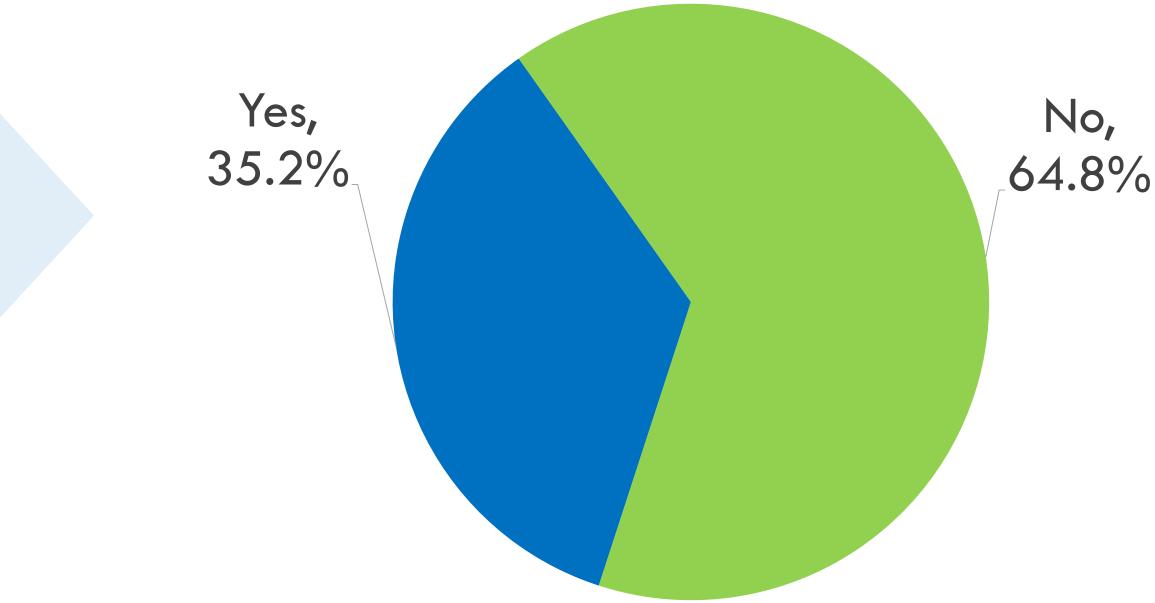
% of all travelers passionate about individual outdoor activities







Outdoor Enthusiasts: Travelers passionate about outdoor activities















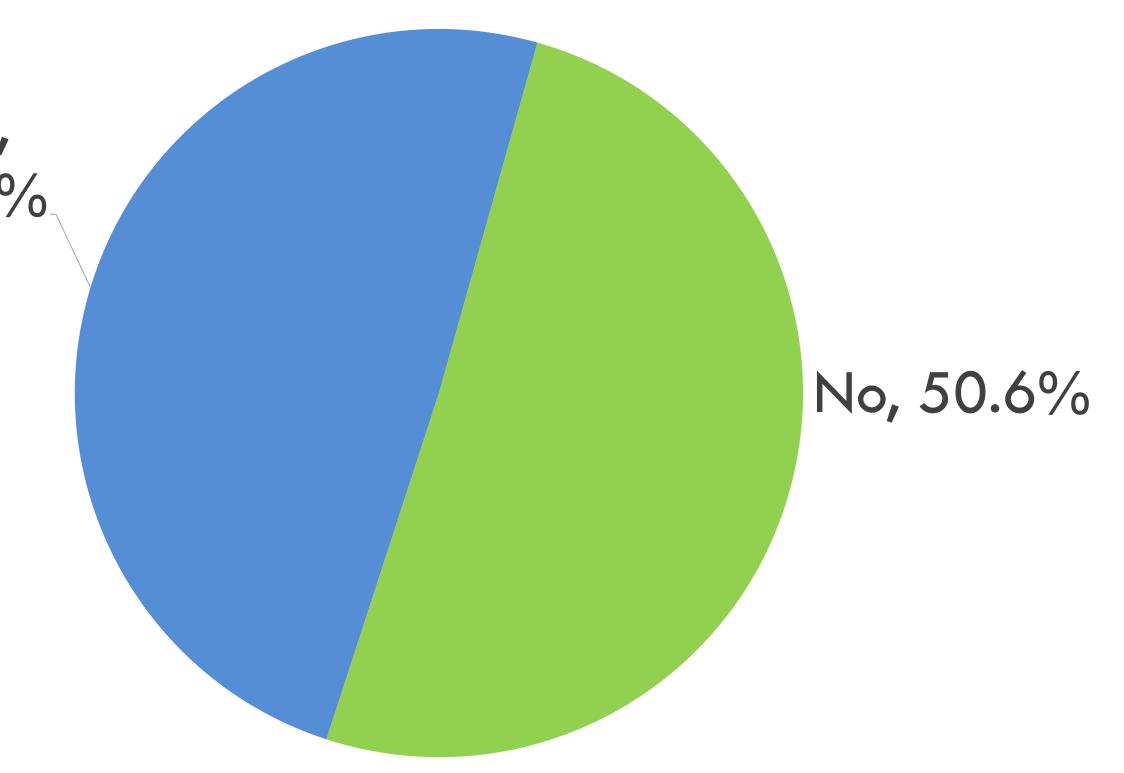
HALF ARE NATIONAL PARKS TRAVELERS

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

MONUMENT?



Yes, 49.4%





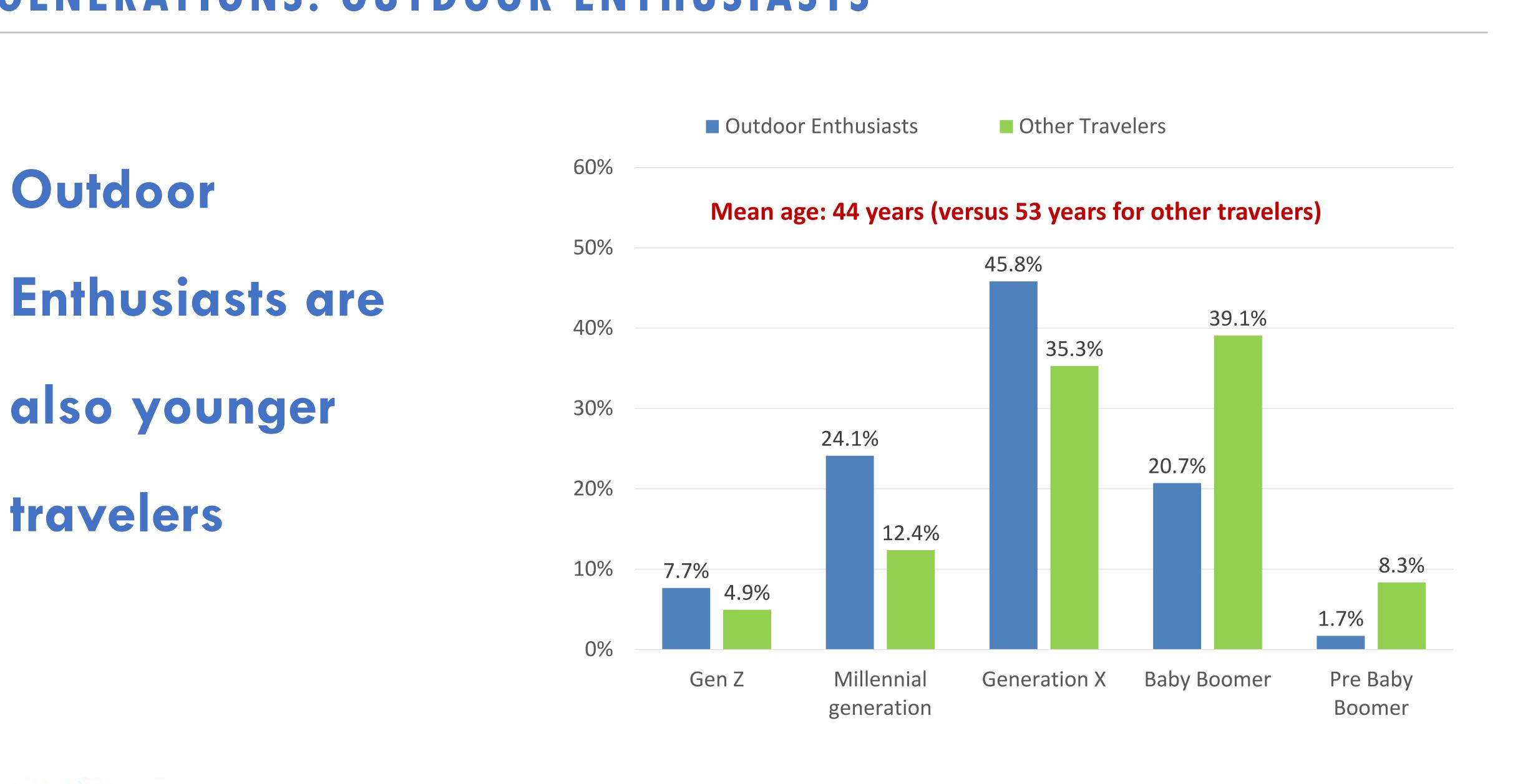








GENERATIONS: OUTDOOR ENTHUSIASTS





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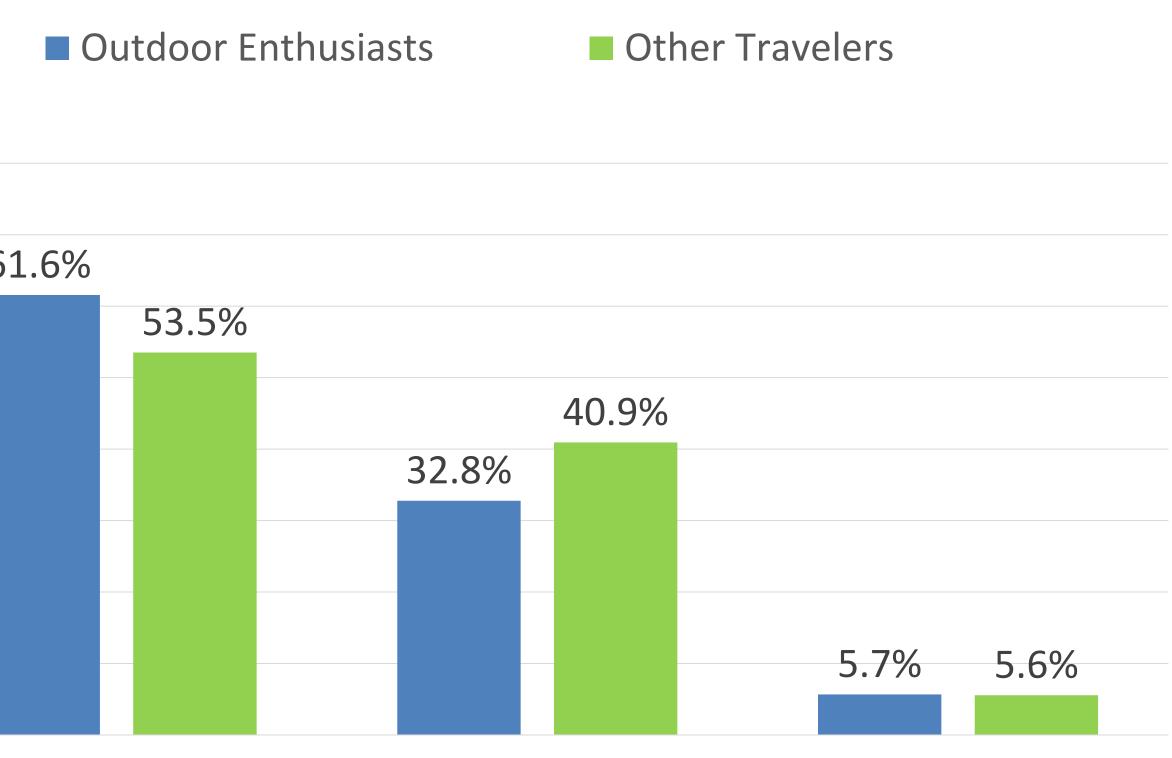


OUTDOOR ENTHUSIASTS ARE READY TO TRAVEL & SPEND

months, do you expect to 80%
70%
63
travel more or less for 60%
leisure than you did in the
40%
most recent 12-month 30%
20%
period? 10%
0%

I expect to travel more I expect to travel about I expect to travel less for leisure the same for leisure for leisure







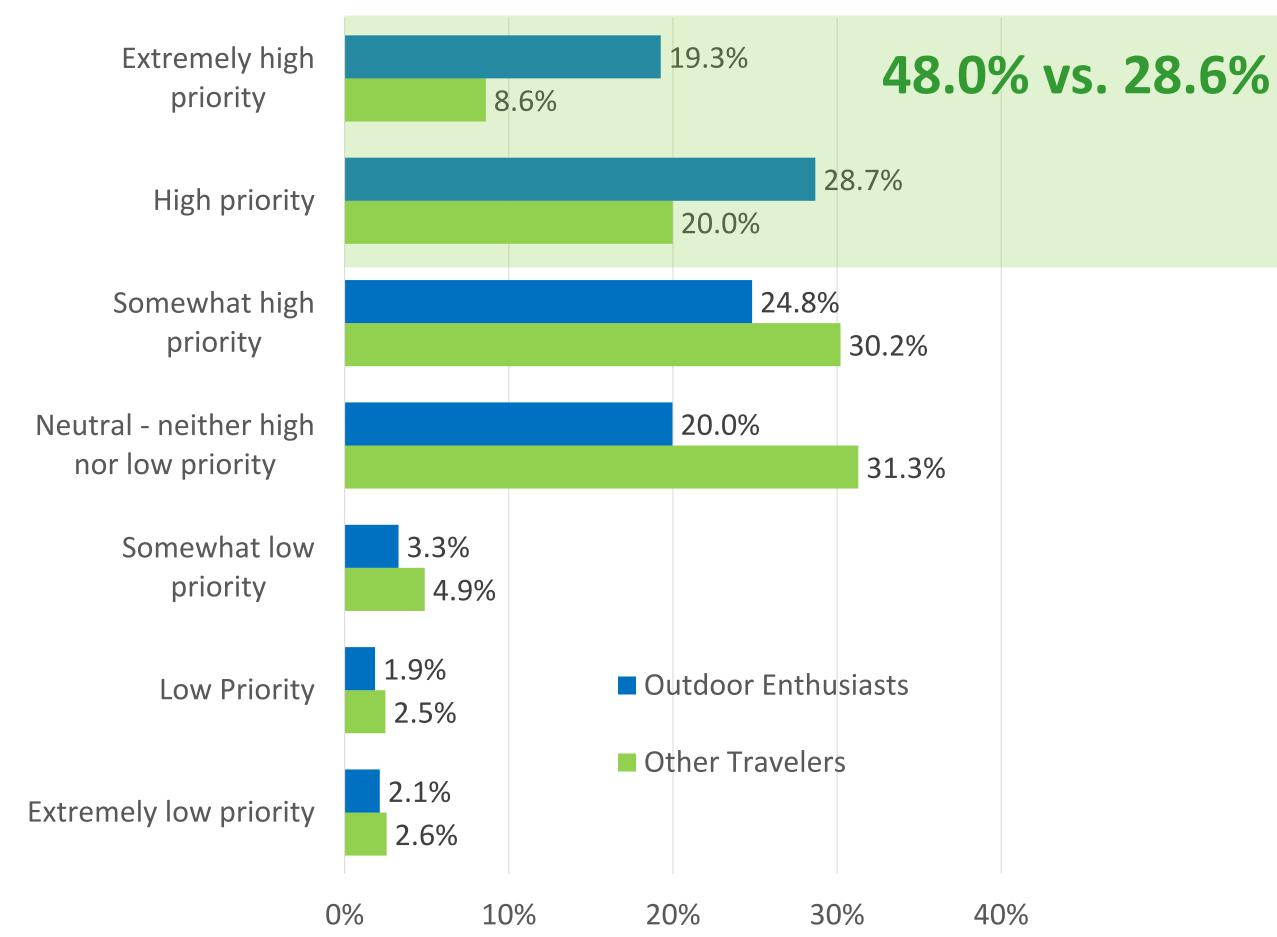








OUTDOOR ENTHUSIASTS: READY TO TRAVEL & SPEND





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.

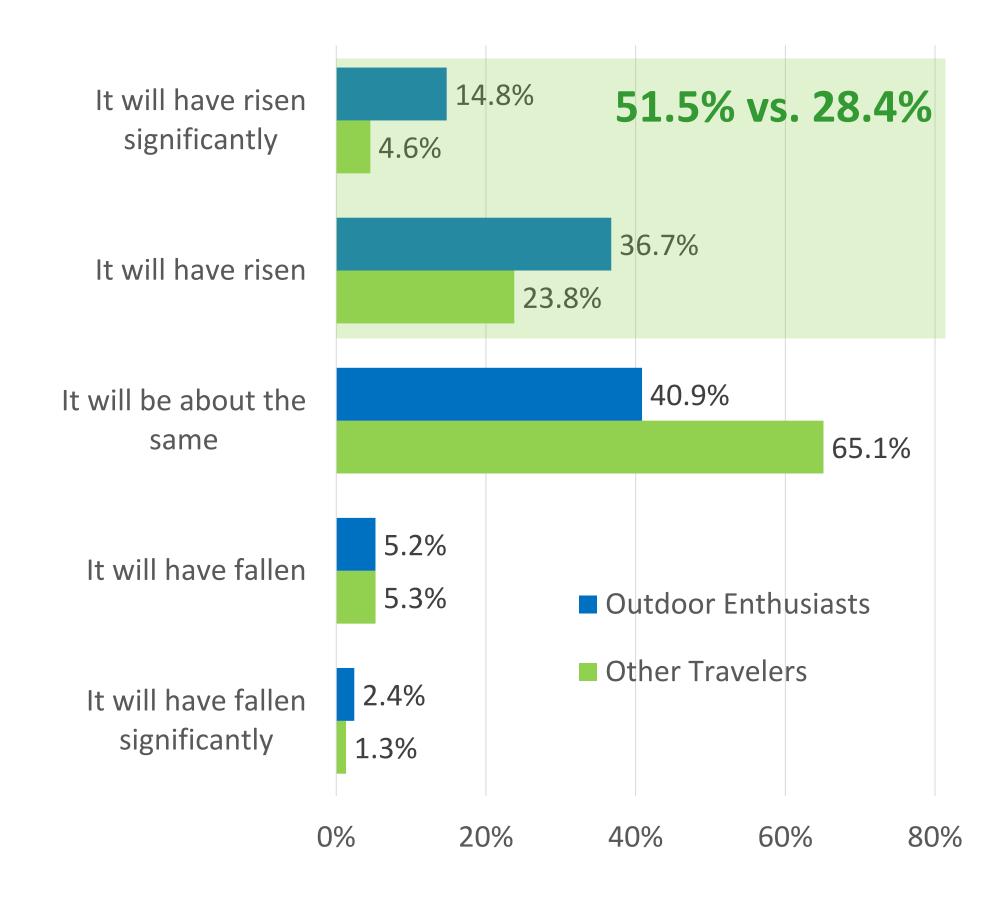






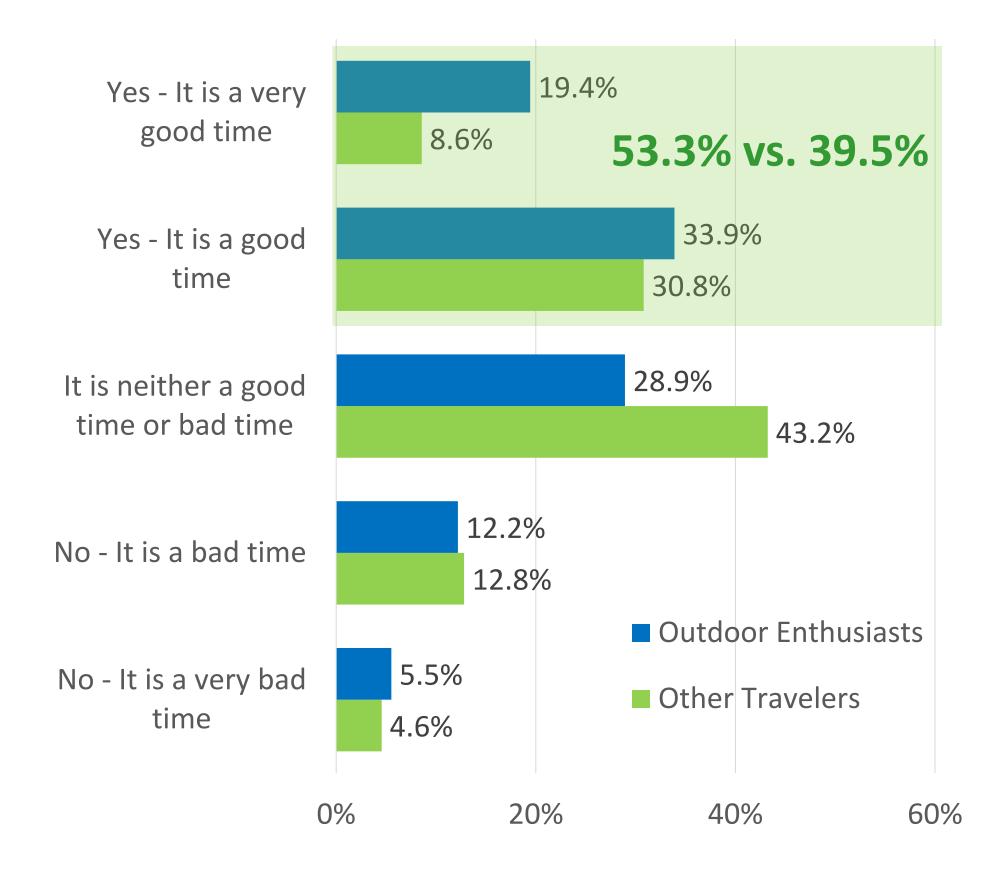
OUTDOOR ENTHUSIASTS: READY TO TRAVEL & SPEND

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?



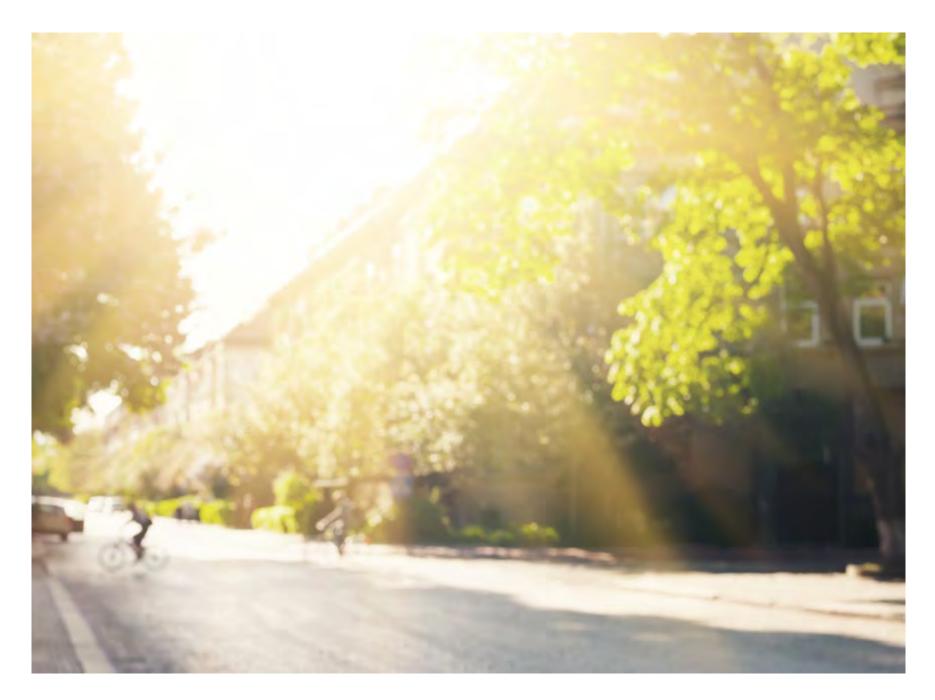
















Are they averse to urban or city experiences?



OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Strongly agree

Generally agree

Slightly agree

Neutral - Neither agree nor disagree

Slightly disagree

Generally disagree

Strongly disagree

Agreement Scale:

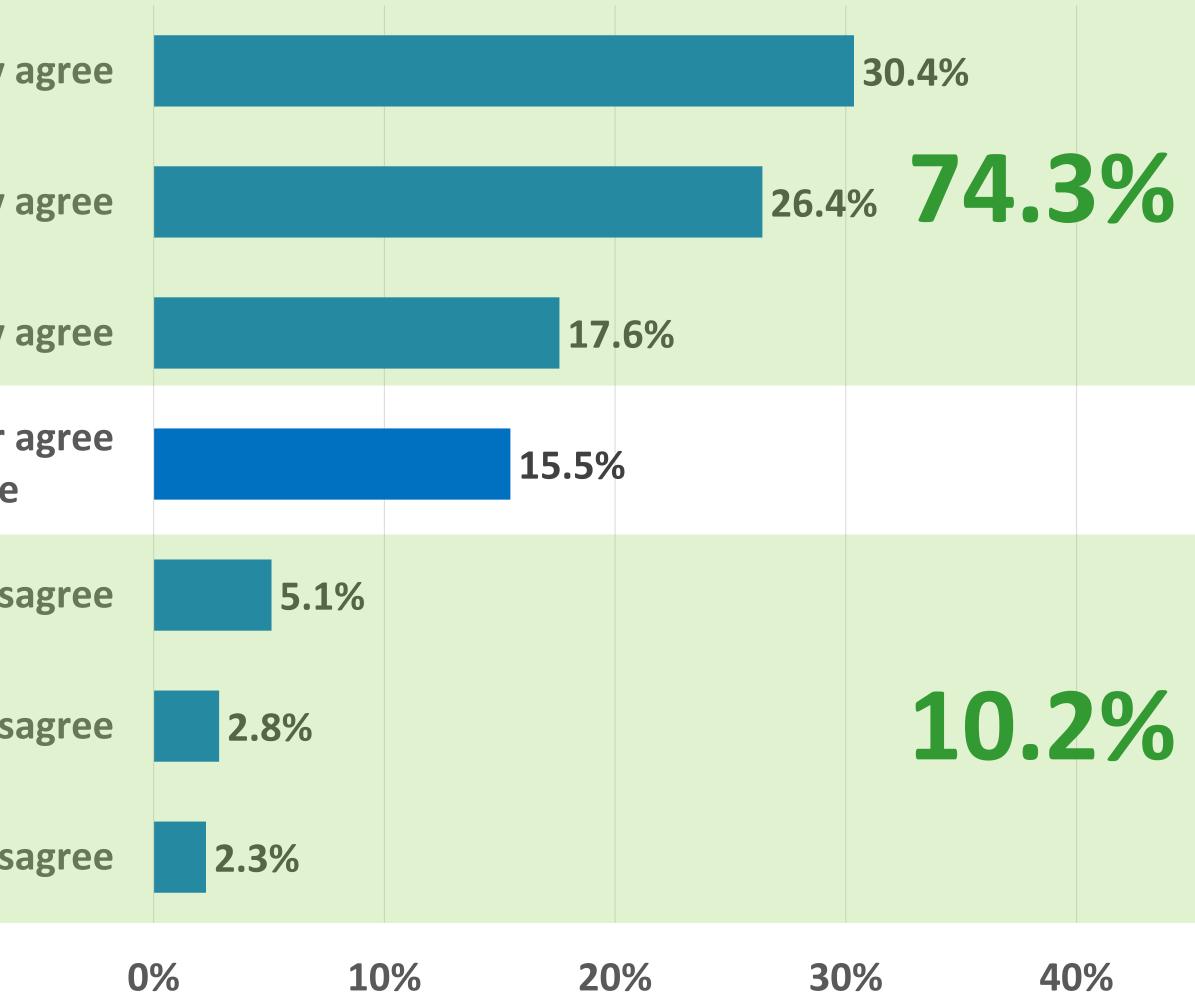
Experiencing nature (away

from urban areas) is

usually an important part

of my leisure travel.















OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Strongly agree

Generally agree

Slightly agree

Neutral - Neither agree nor disagree

Slightly disagree

Generally disagree

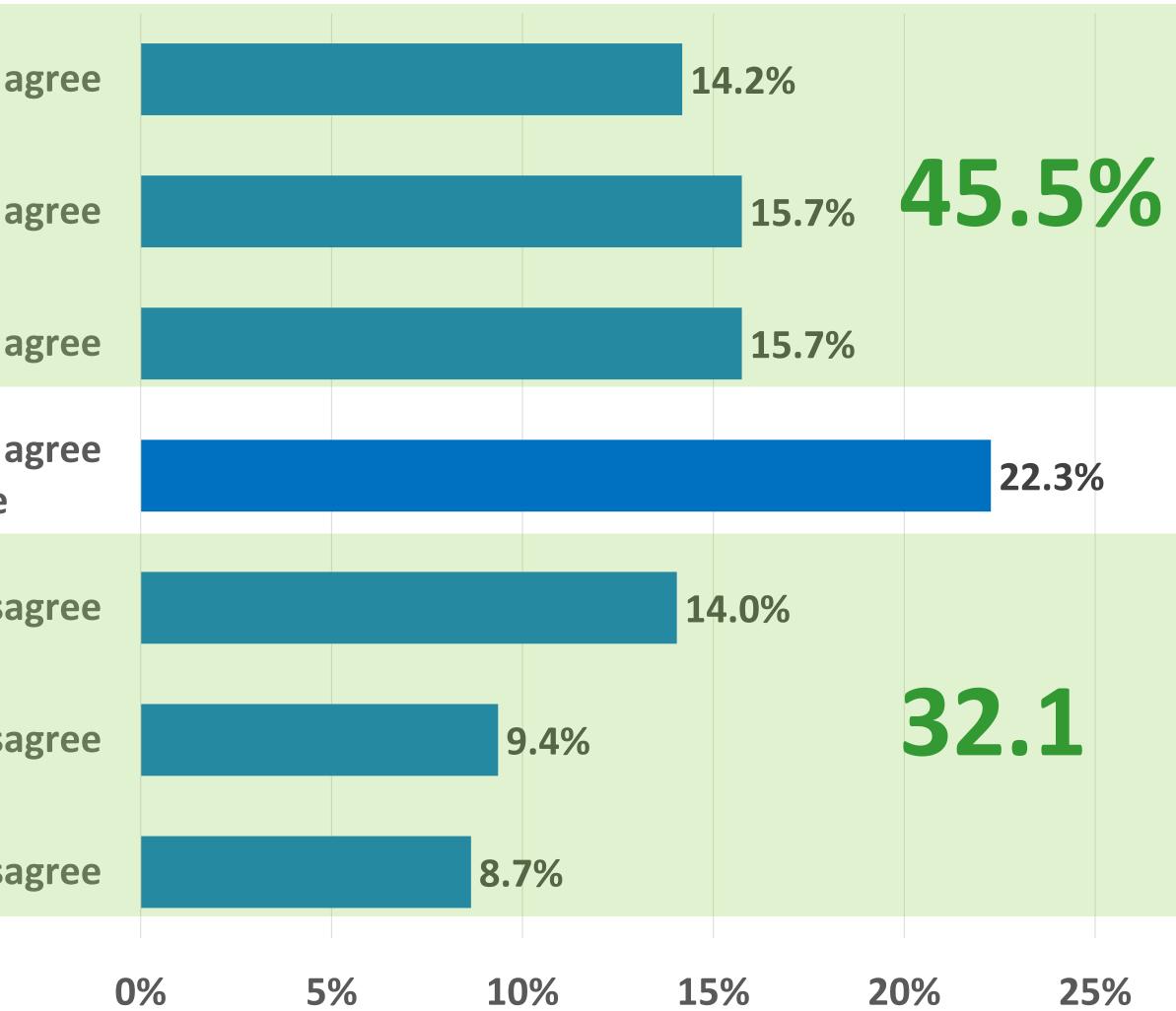
Strongly disagree

Agreement Scale:

I do not like spending my

vacation time in cites















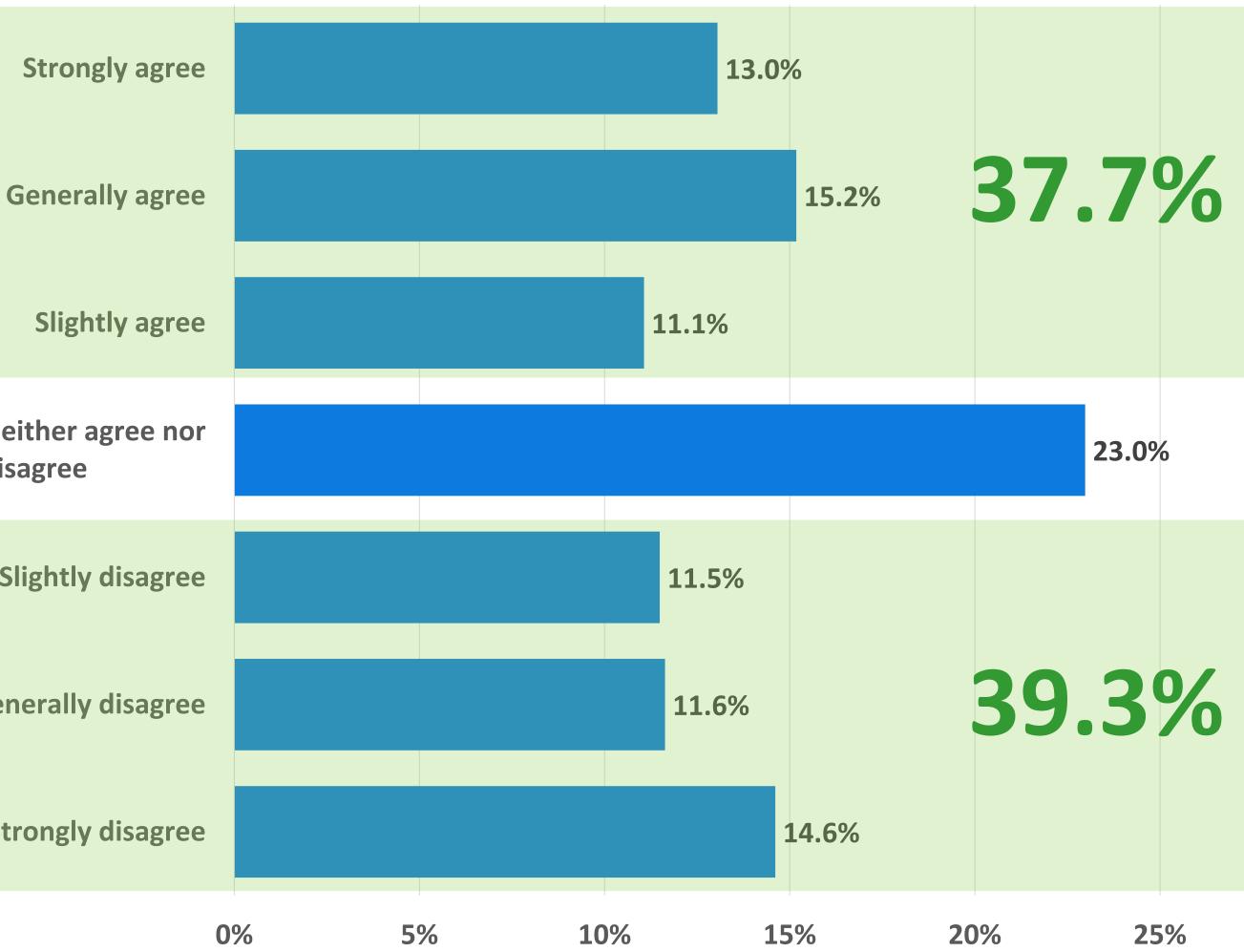


OUTDOOR ENTHUSIASTS: CITIES VERSUS RURAL PREFERENCES

Agreement Scale: I prefer visiting large cities to rural travel experiences **Neutral - Neither agree nor** (beach resorts, National or disagree State Parks, smaller towns, **Slightly disagree** scenic byways, etc.) **Generally disagree**

Strongly disagree













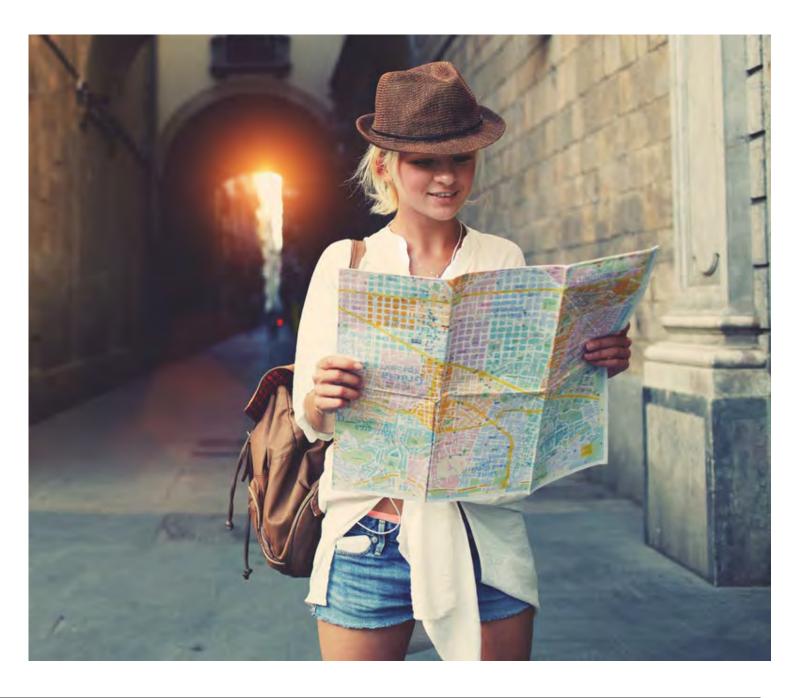








What are they into beyond outdoor experiences?





TRAVEL PASSIONS: OUTDOOR ENTHUSIASTS

Question: Tell us International travel about your hobbies Enjoyi Musical concerts (pop, rock, hip and passions. Mu Please use the scale below to describe

Attending professional sports

Hiking (o

Theater or plays, (or



your interest in each.

Food and cuisine	33.1%			30	6.9%				
Camping	27.1%			35.9%					
Hiking (day hikes)	28.0%			32.8%					
avel (taking trips outside the USA)	26.3%		30).9%					
Fishing (Freshwater)	29.1%		2	6.0%					
oying theme or amusement parks	25.6%		27.3	8%					
nip hop, alternative, modern, etc.)	27.3%		25.	1%					
Crafting, DIY or creative projects	32.9%		17	7.8%					
Gambling / Gaming	37.8%)		11.8%					
Music festivals (multi-day events)	28.3%		20.8	%					
Craft beers	30.8%		17.6	5%					
Canoeing, kayaking or rafting	23.5%		24.5%						
Art museums	29.8%		17.0	%					
orts (large-venue, like NFL or MLB)	24.0%		21.1%						
g (over-night on trail, longer haul)	22.6%		20.5%						
Photography	18.3%	24	.3%						
Video games - Video gaming	24.5%		18.0%						
Wine	22.3%	2	0.0%						
(on or off Broadway productions)	25.0%	-	16.1%						
Recreational vehicle travel	15.3%	24.39	6						
0% High importance	6 10% 20% ■ Passionate ak)% 40	9% 50)% 6	50%	70%	80%	









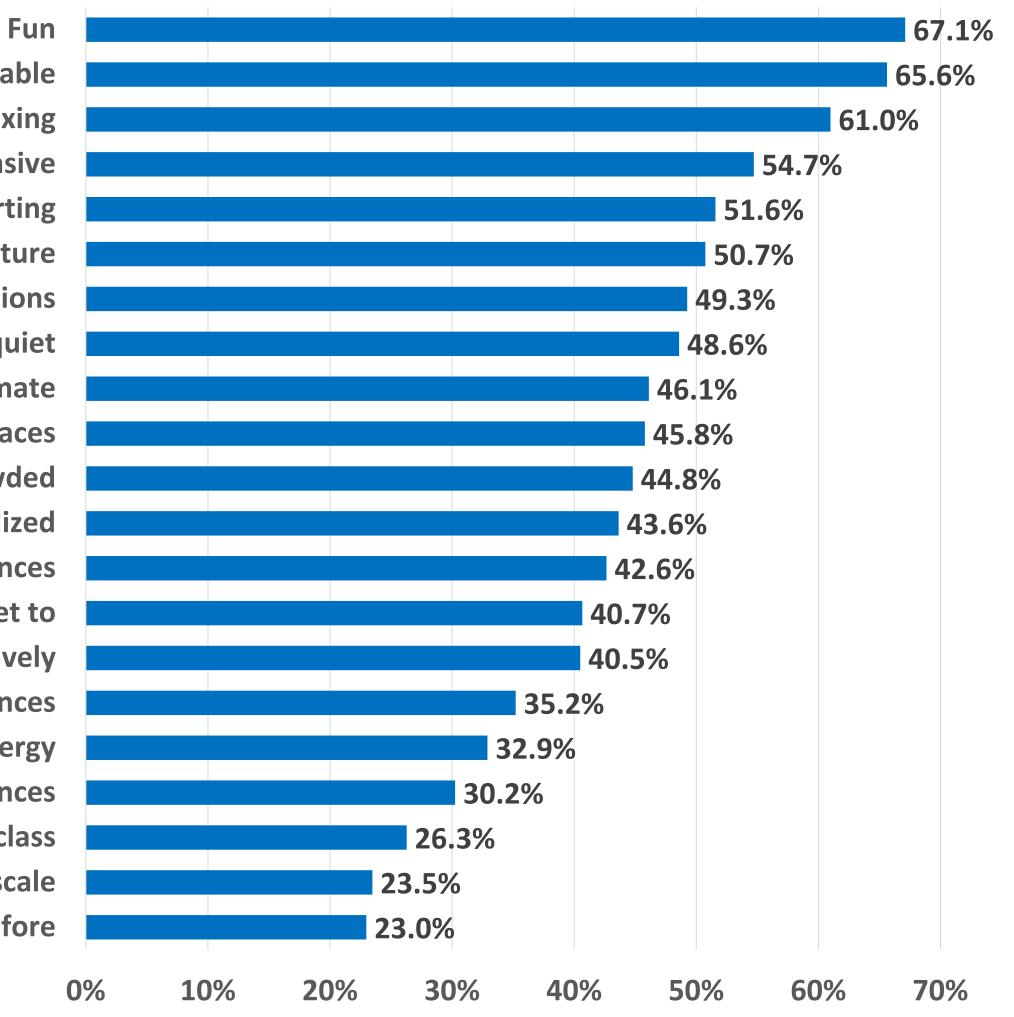




WHAT THEY'RE LOOKING FOR IN TRAVEL: OUTDOOR ENTHUSIASTS

Memorable **Question: Please tell** Relaxing **Affordable - not too expensive** Comforting us how you want **Close to nature Great culinary/food options** the places you visit Peaceful - quiet Sunny, warm climate **Unique - unlike other places** to be. How Uncrowded Not overly commercialized Family-friendly activities and experiences important is each **Convenient - easy to get to Exciting - lively** A place for romantic experiences attribute? Active - a place with energy A place for transformative change - life changing experiences **Cultured - high-class** Luxury - upscale Familiar - been there before



















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

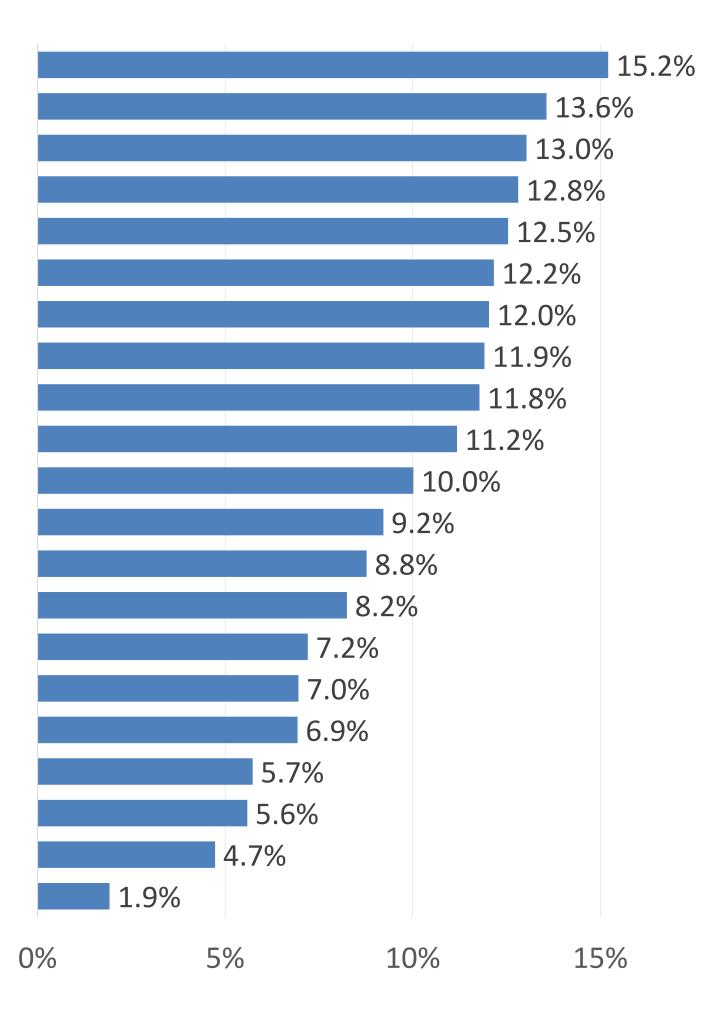
(Absolute % difference Outdoor Enthusiasts vs. Other Travelers)

-5%

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

Fun Great culinary/food options Memorable Close to nature Relaxing Unique - unlike other places Uncrowded Not overly commercialized Affordable - not too expensive Peaceful - quiet Comforting Sunny, warm climate Exciting - lively Convenient - easy to get to Active - a place with energy Family-friendly activities and experiences A place for romantic experiences Familiar - been there before Cultured - high-class A place for transformative change - life changing experiences Luxury - upscale











Outdoor Enthusiasts represent 35 percent of the traveling public. About half of them also visit our National Parks.

They tend to be younger, with a mean age of 44 compared to other travelers at 53 years of age.

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.

While experiencing nature away from large cities is typically an important part of their travel, many prefer urban travel destinations to rural ones.







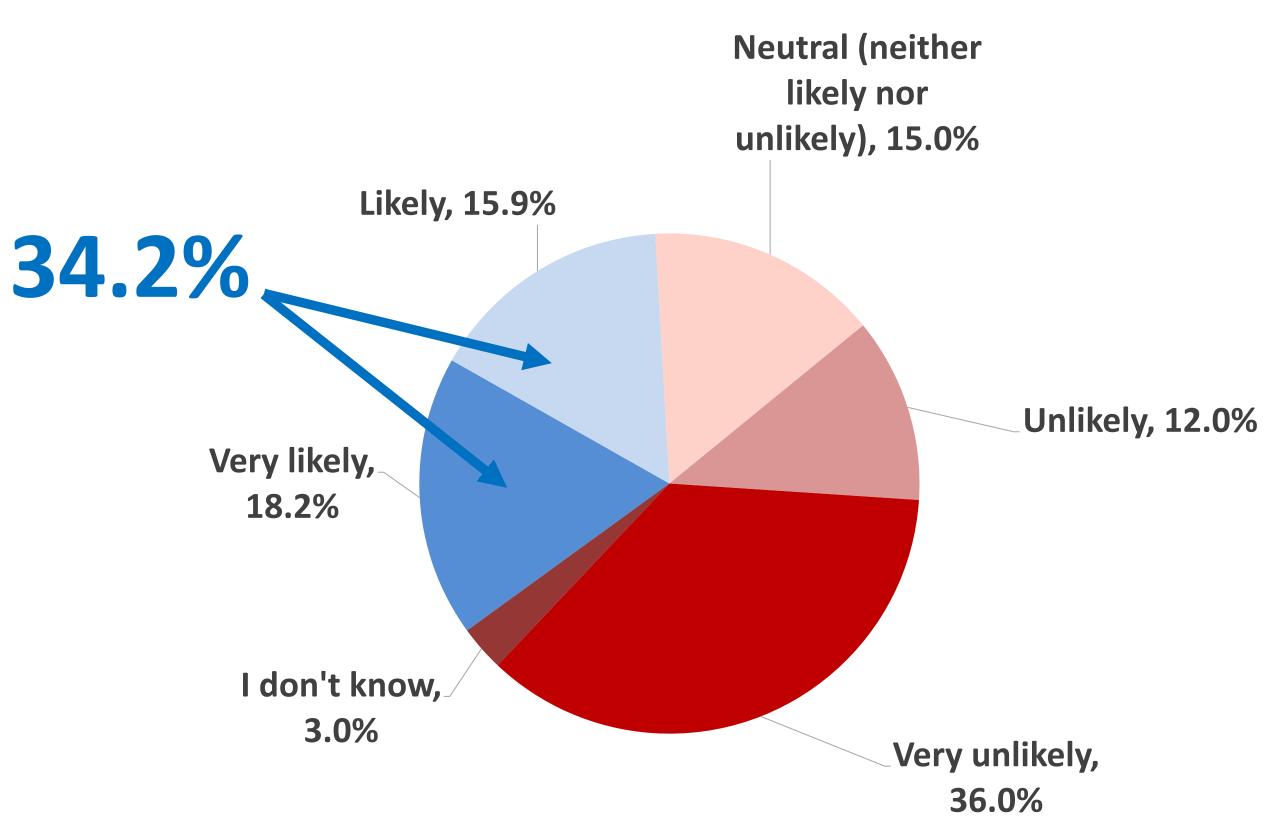
Likely International Travelers





HOW MANY LIKELY INTERNATIONAL TRAVELERS ARE THERE?

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















QUESTION: In the next 12

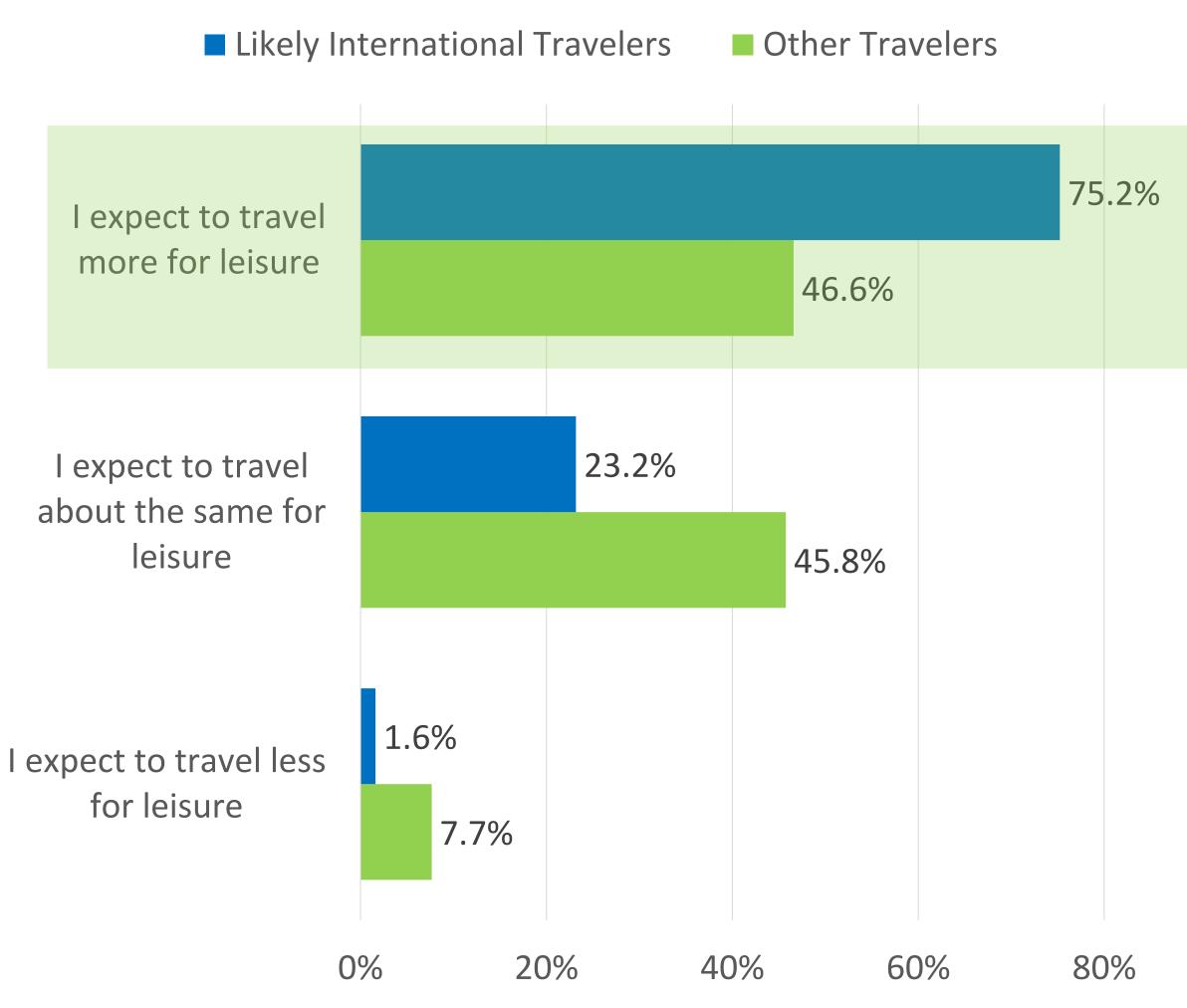
months, do you expect to travel

more or less for leisure than you

did in the most recent 12-month

period?





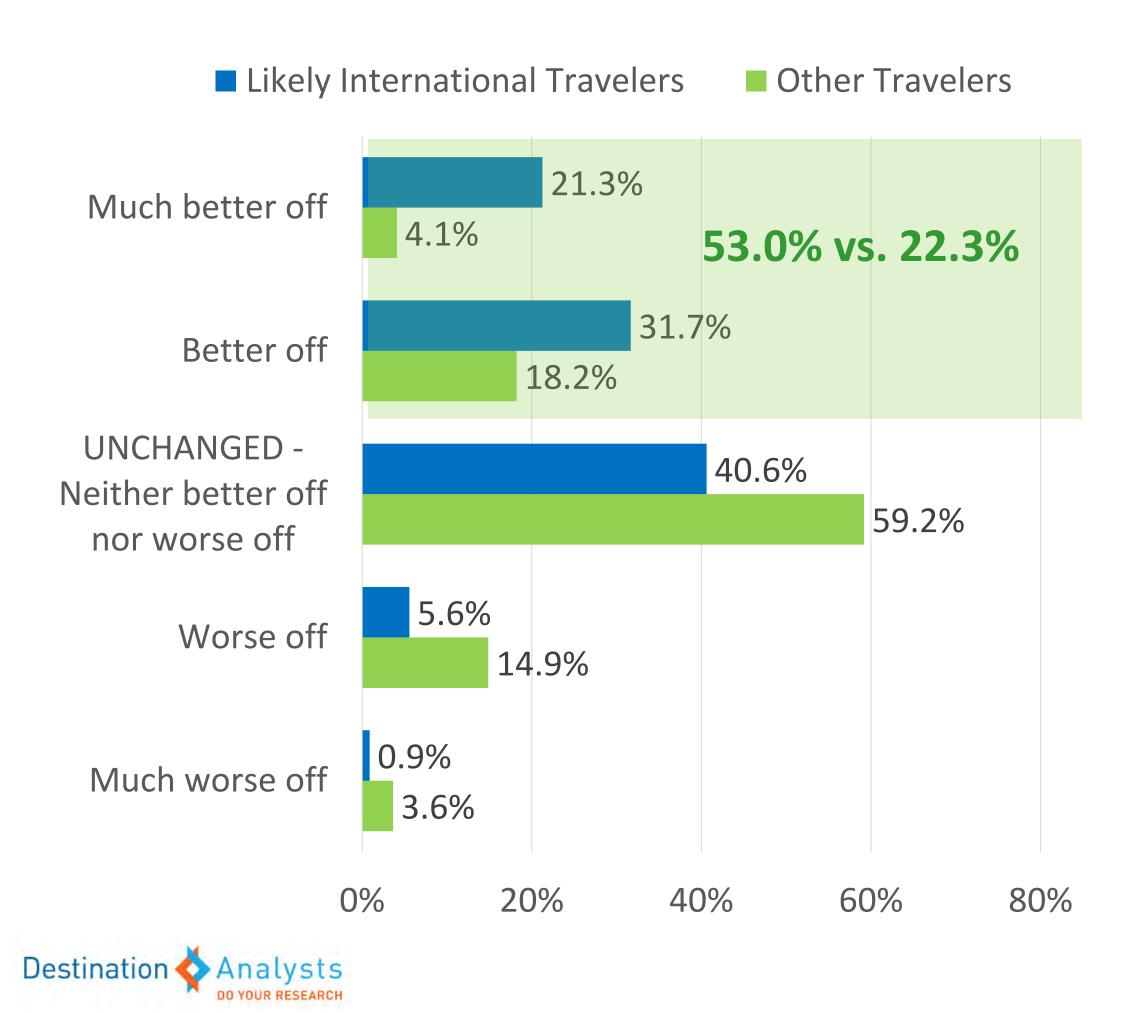




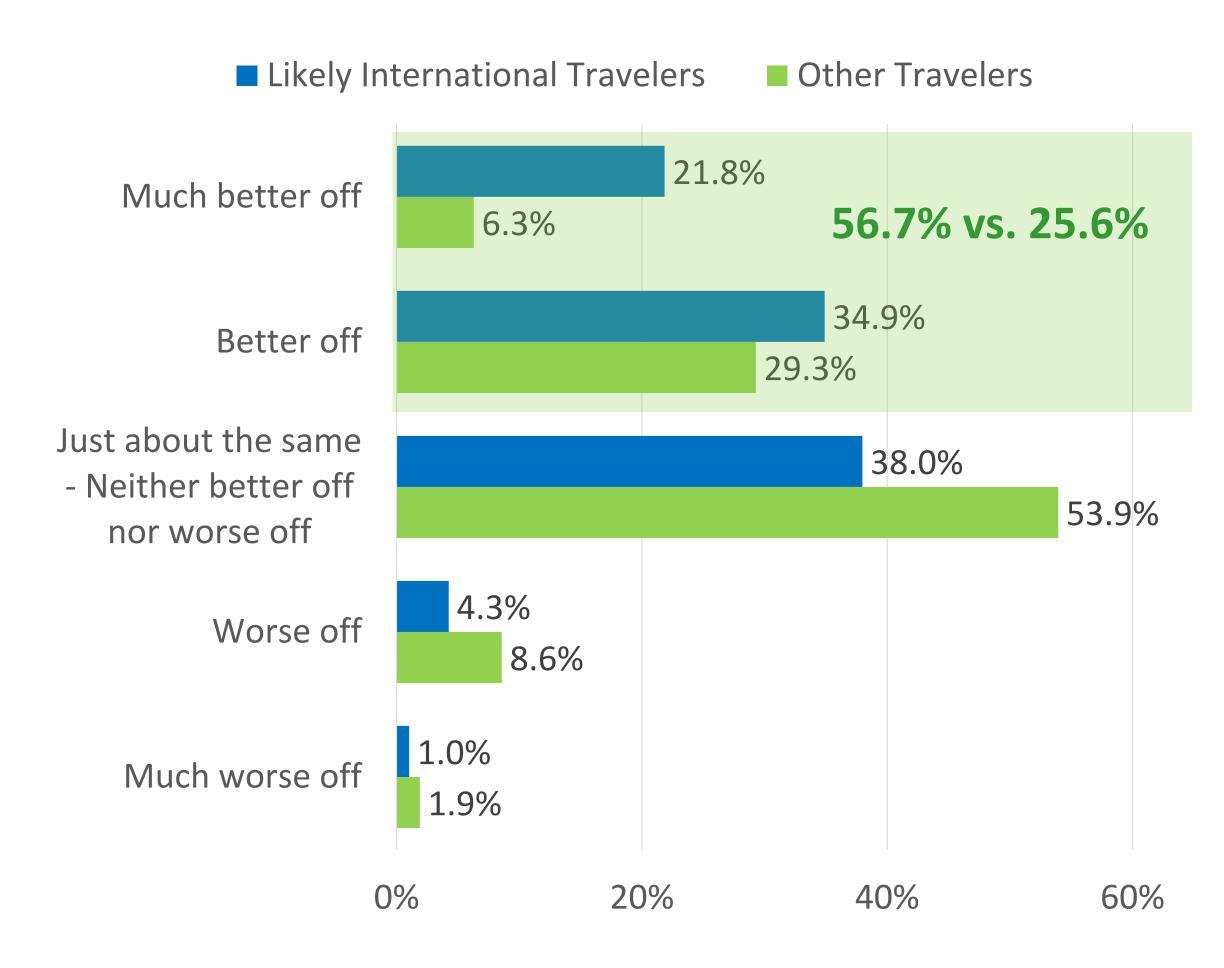


THEY'RE DOING WELL FINANCIALLY

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?













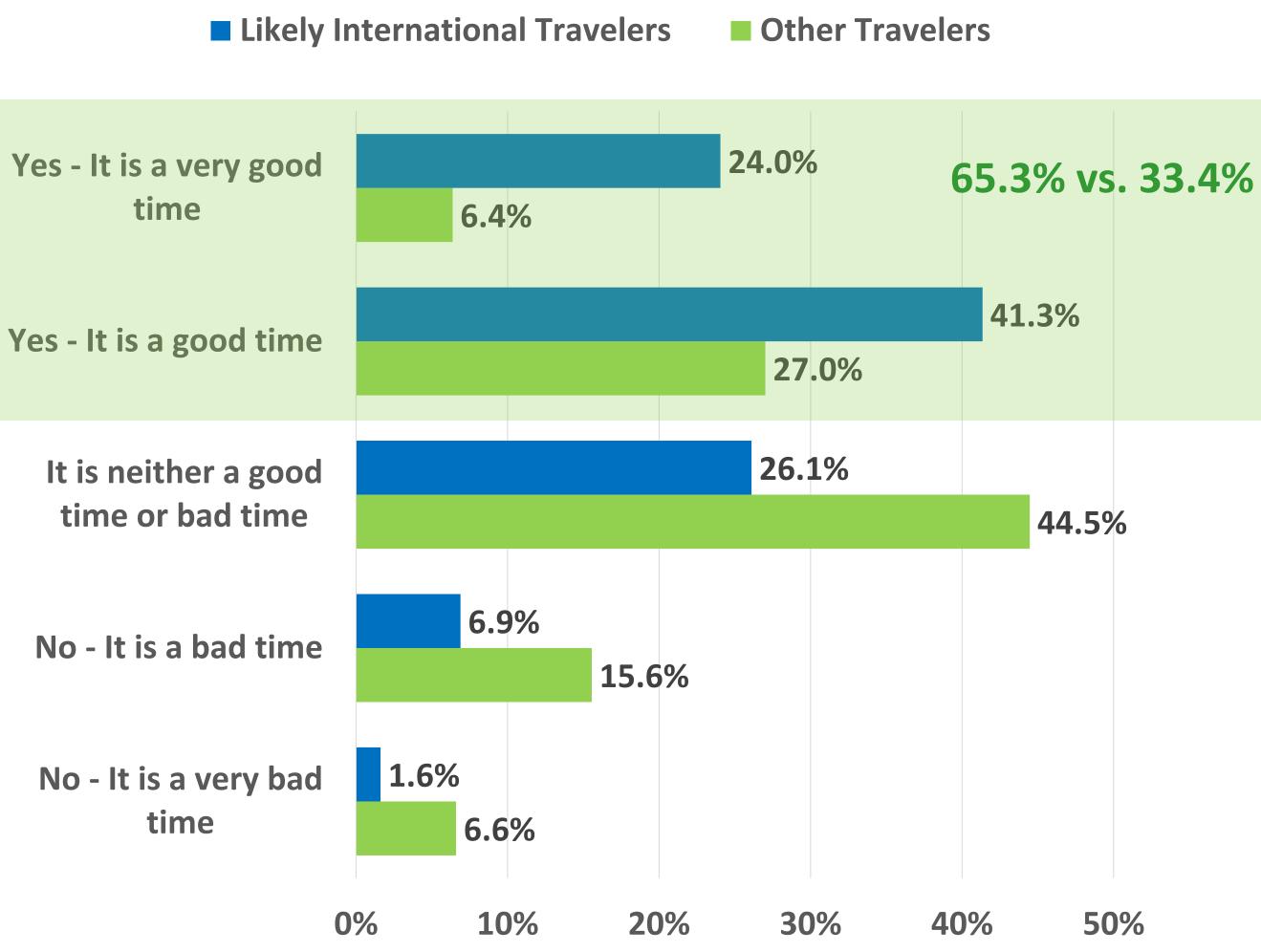


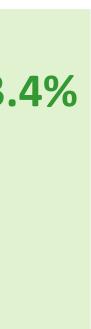
THEY'RE DOING WELL FINANCIALLY

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

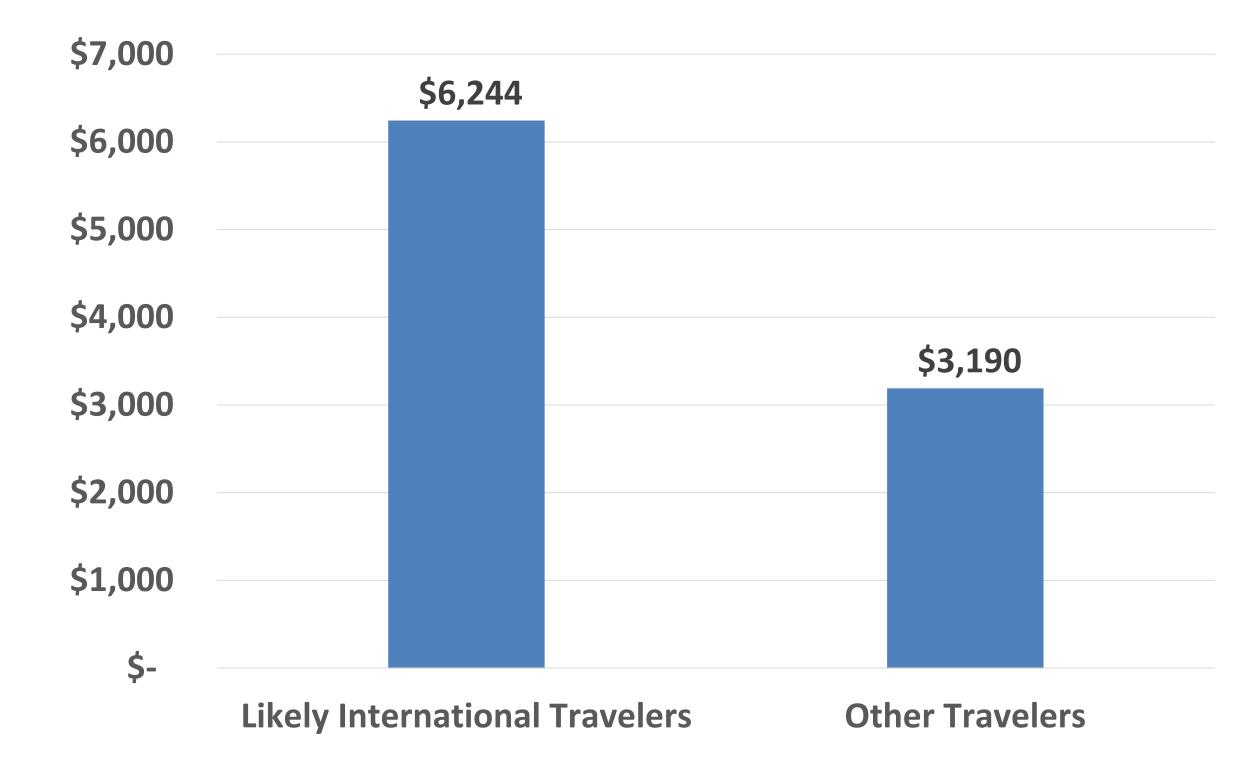
Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in next year.



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**?











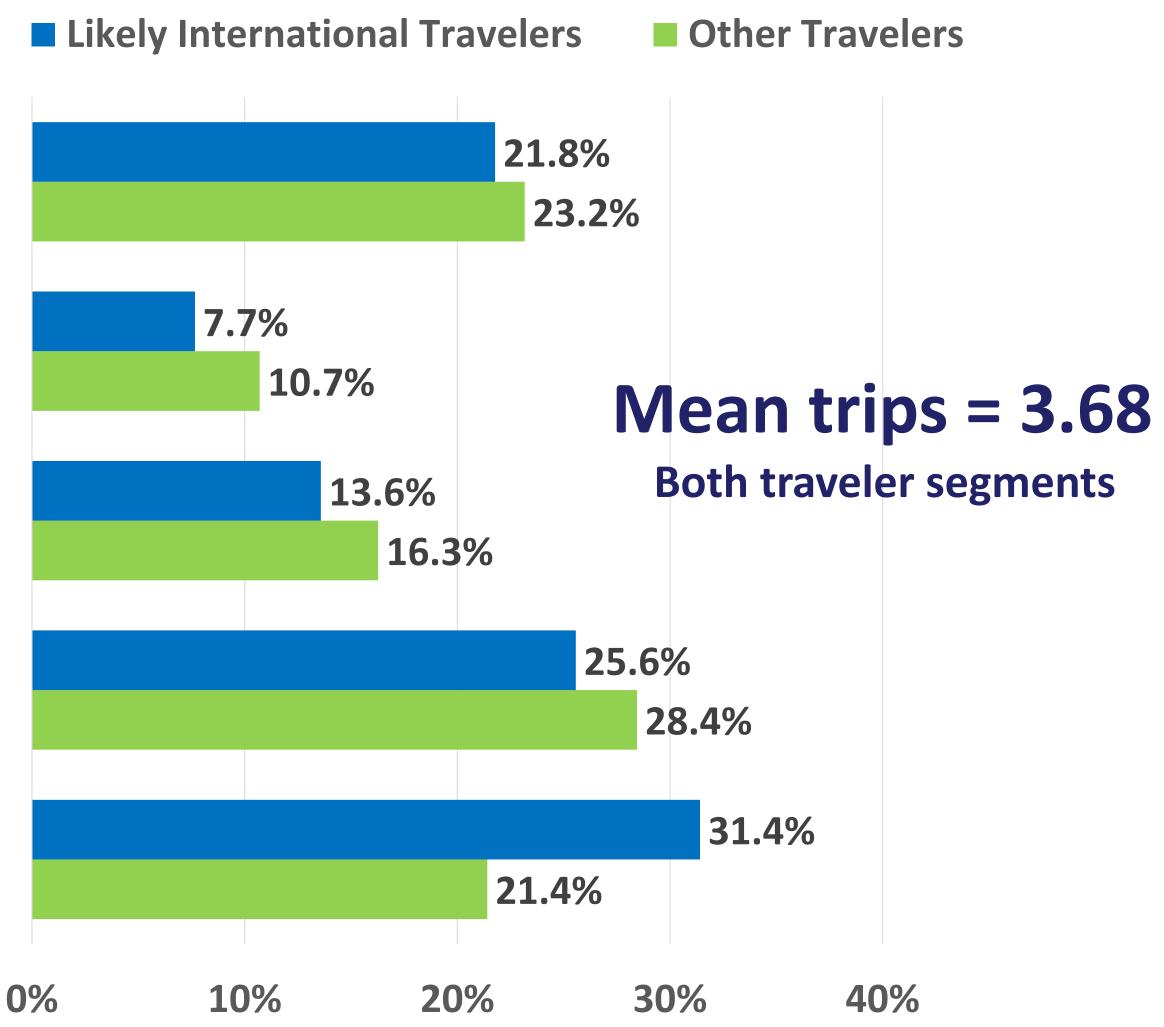




SIMILAR OVERALL TRAVEL PROPENSITIES

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





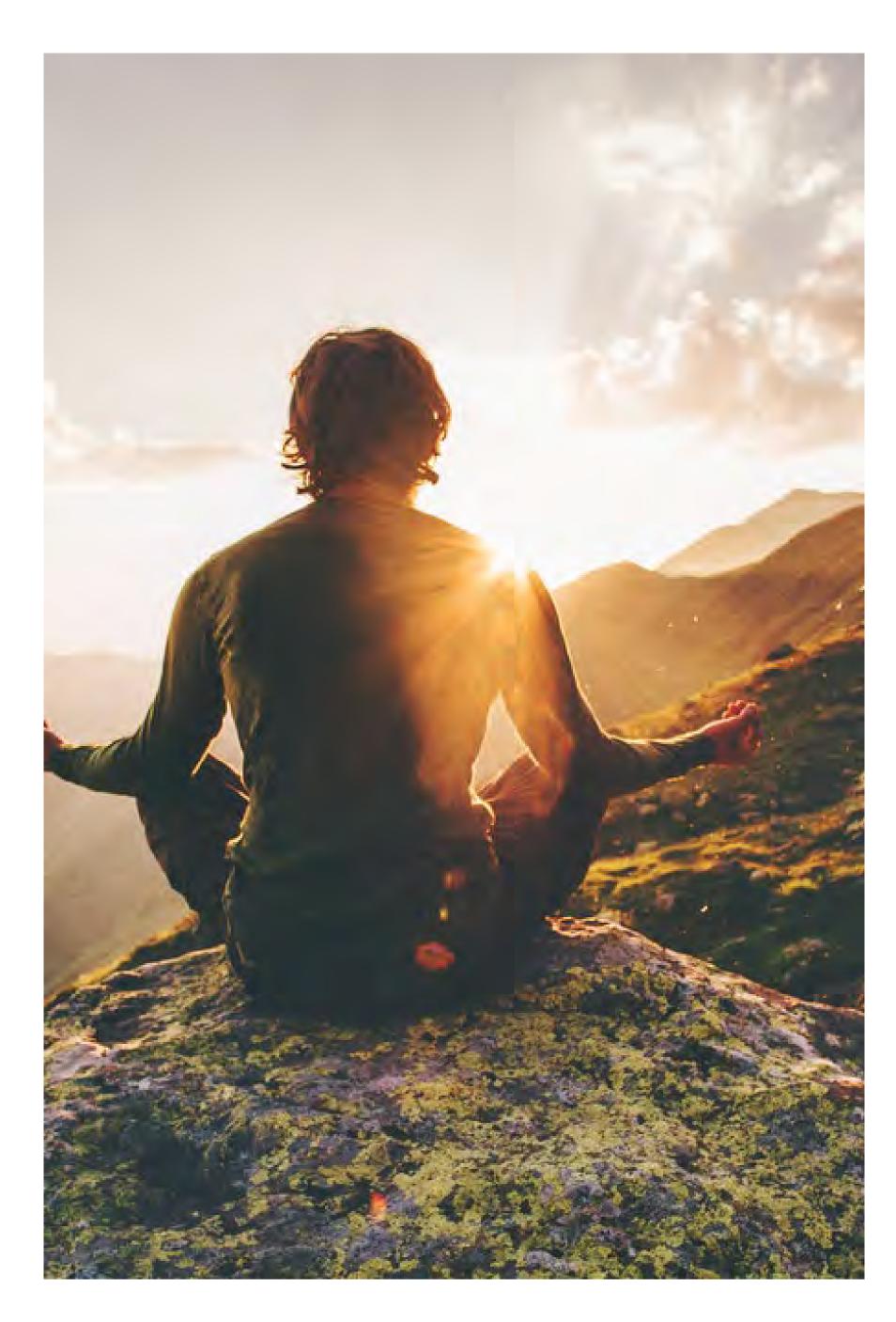












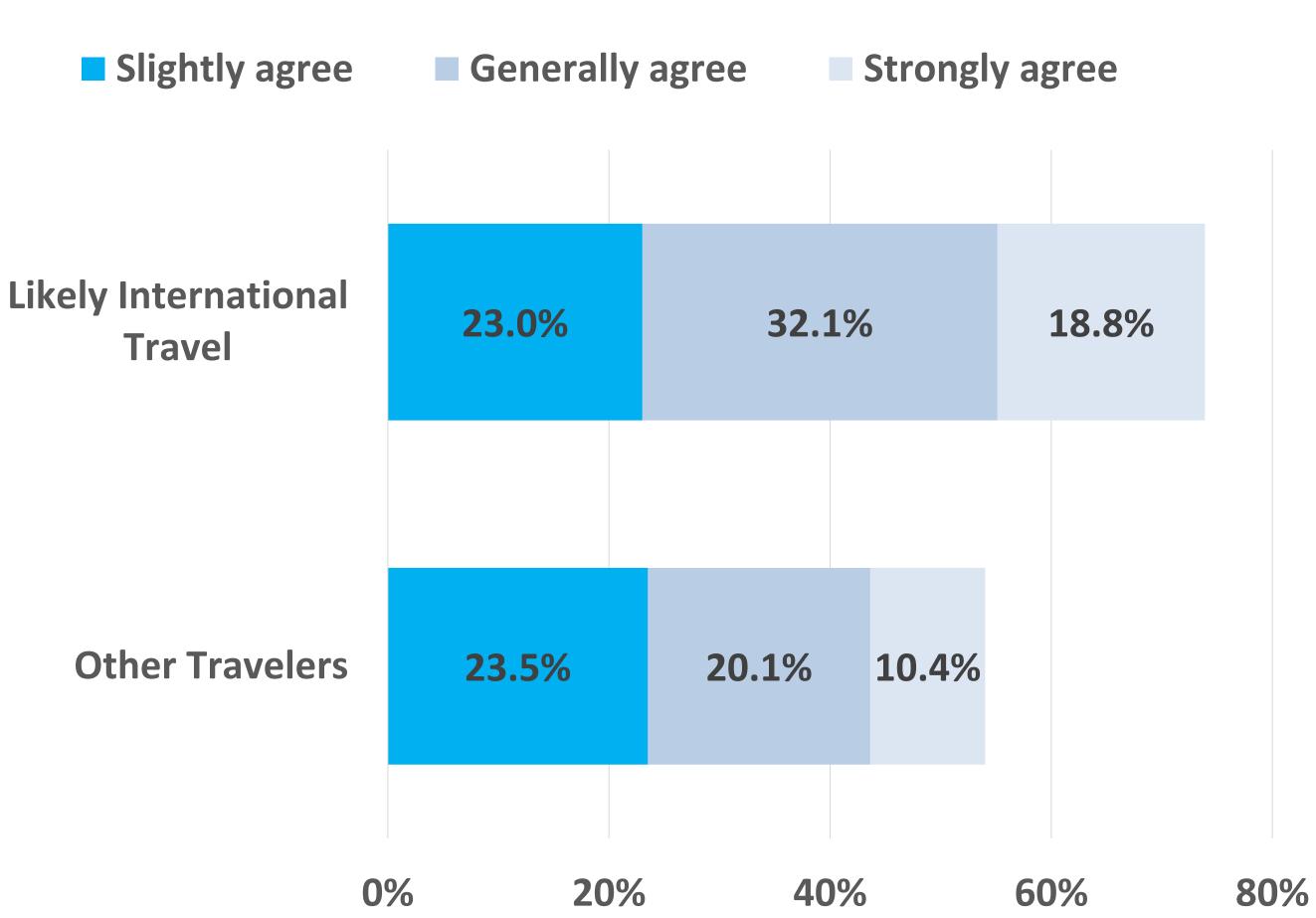


Likely International Travelers are Authenticity Seekers





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

Likely Internati Travel

destinations and attractions

Other Trave



	Slightly agre	e Gen	erally a	agree	Strong	y agr	ee
ly tional eler	15.7%	6	15.5%	6	12.9%		
velers	14.9%	10	.2%	5.7%			
0	% 10)%	0%	30%	6 4 0	%	50%



%











AUTHENTICITY SEEKERS

IMPORTANCE SCALE:



Experiencing the lifestyle of

people living in my

Likely Internation

destination

Othe



Slightly important Important Extremely important						
ional Travel	23.9%	26.4%	18.2%			
er Travelers	26.7%	19.3% 7	.7%			
0	% 20%	40%	60%			





QUESTION:

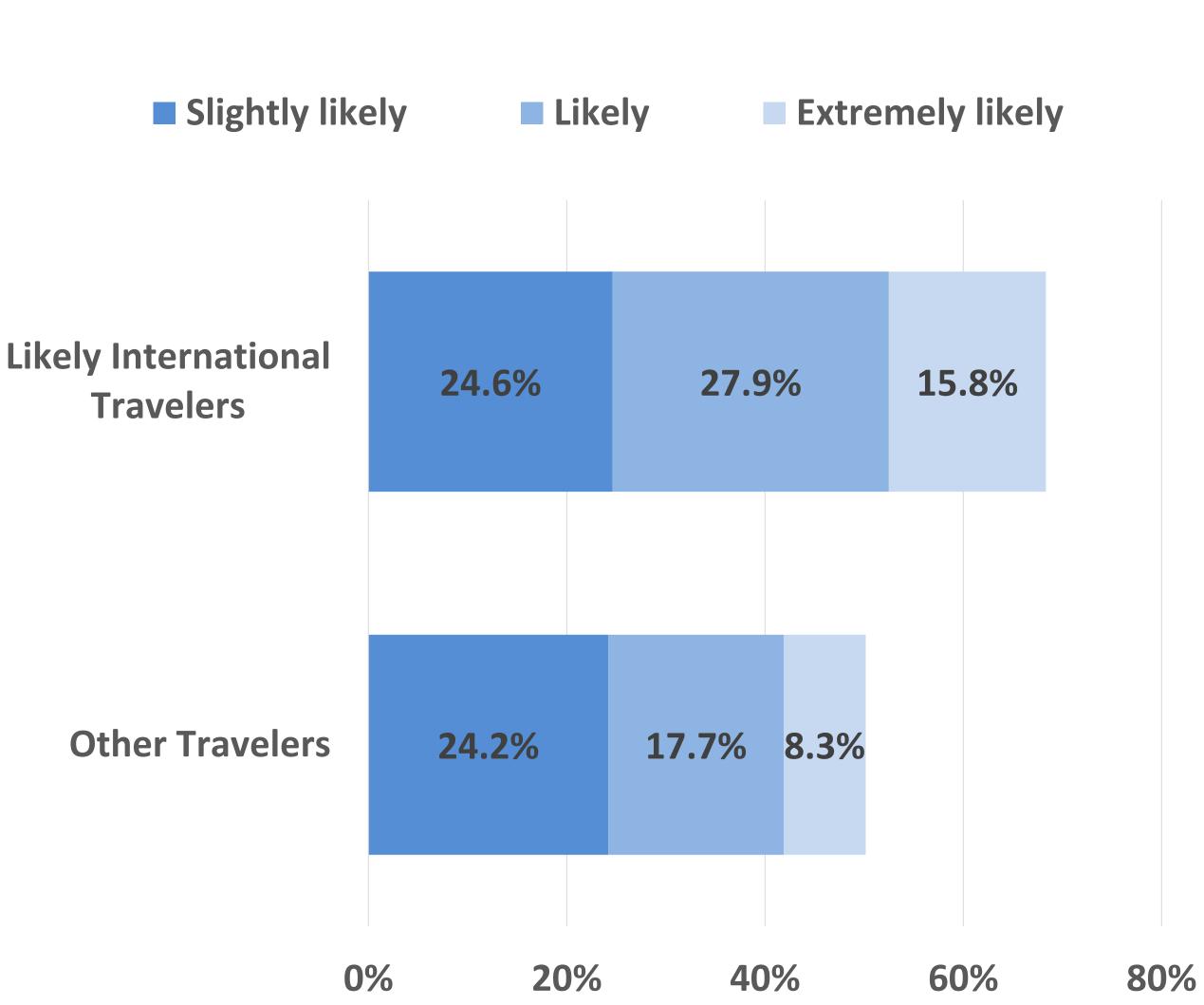
Prioritize learning as much as

possible about the customs,

traditions and history of my

destination















AGAIN, THEY'RE RELATIVELY YOUNGER TRAVELERS

Pre Baby Boomer

QUESTION: In what

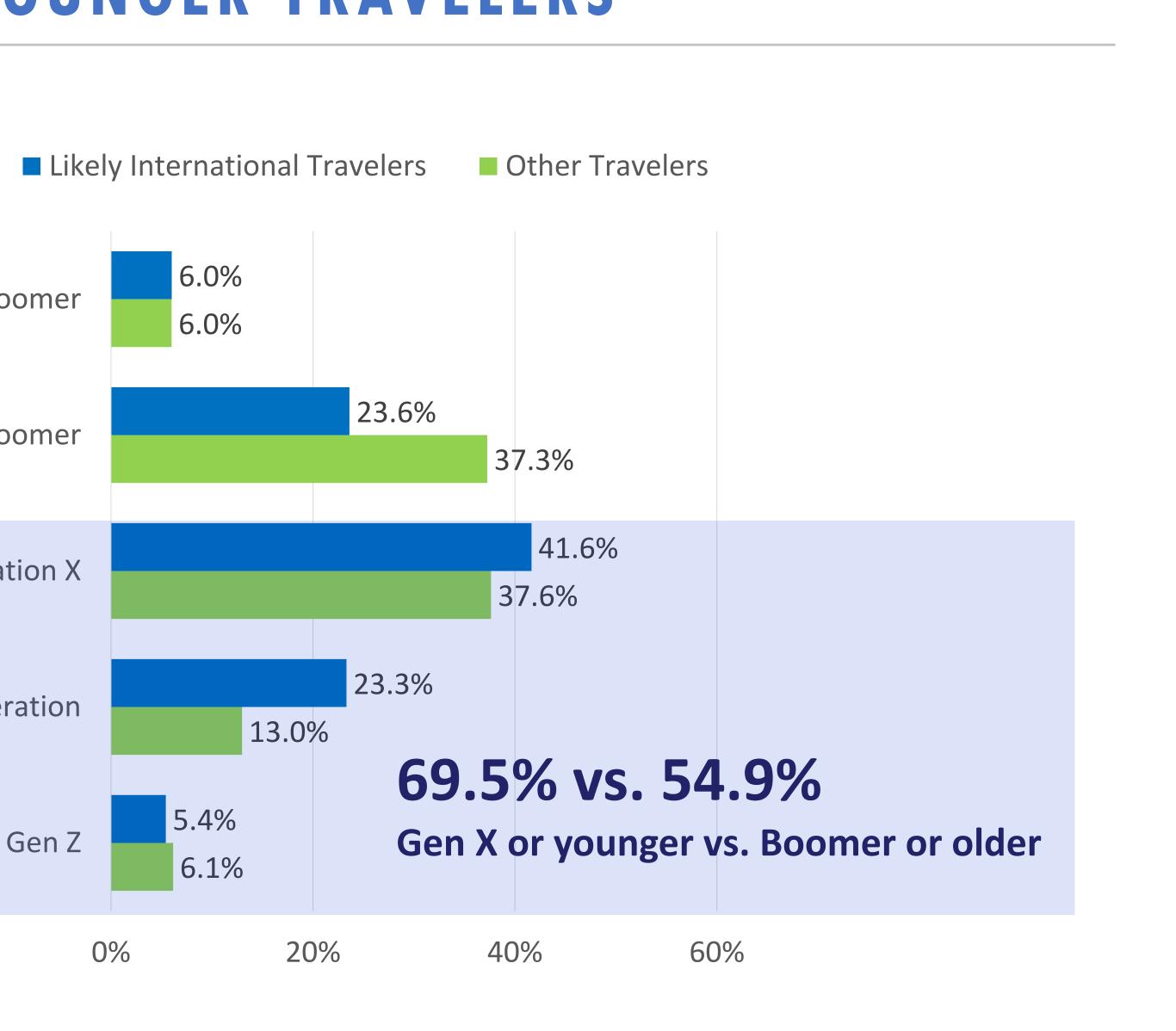
year were you born?

Baby Boomer

Generation X

Millennial generation





PAGE 71









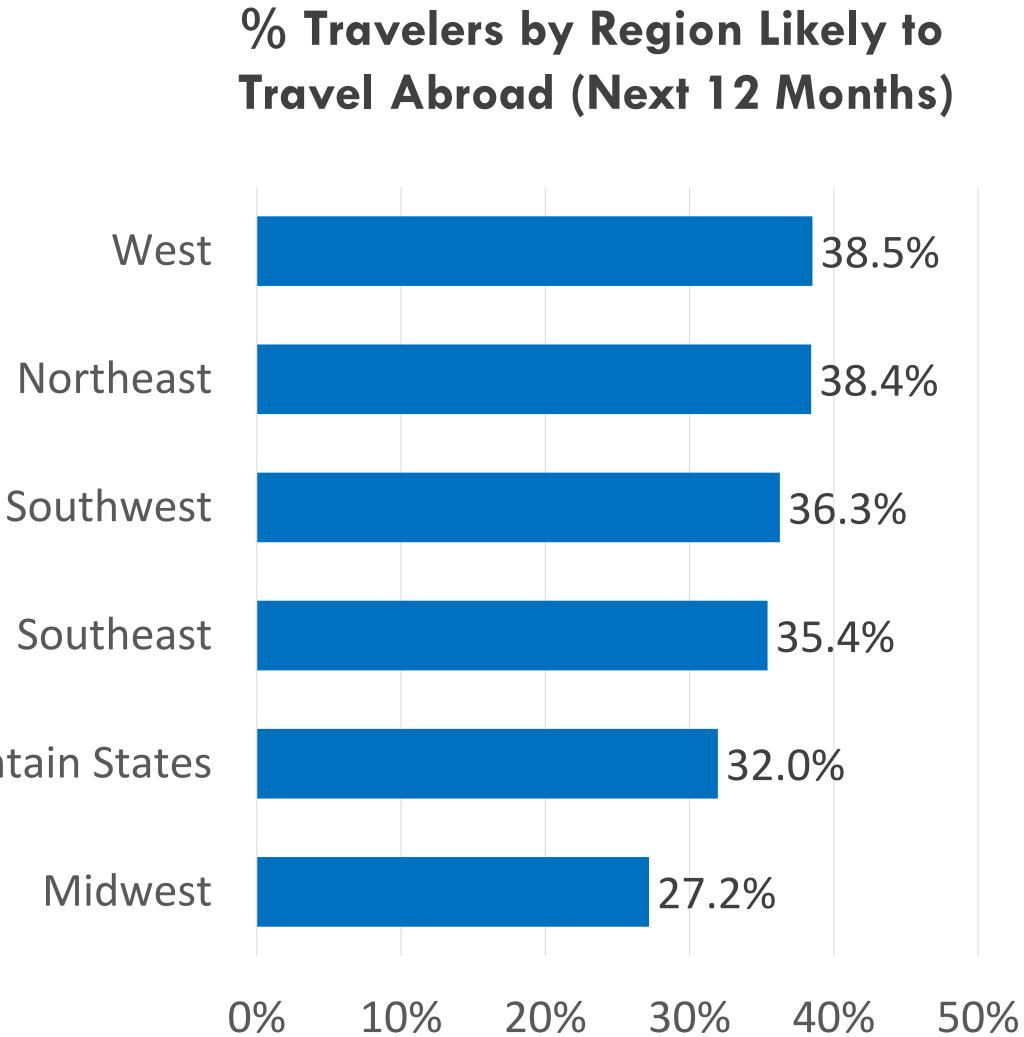
MOST LIKELY TO LIVE IN THE WEST OR NORTHEAST

QUESTION: In what

state do you live?

Rocky Mountain States















TRAVEL PASSIONS: LIKELY INTERNATIONAL TRAVELERS

High interest
Extremely high interest - I'm passionate about this

Question: Tell us

about your hobbies

and passions.

Please use the scale

below to describe

your interest in each.

International travel (ta

Musical conce

Enjoying

Theater or plays, (on or Musical concerts (

Fitness/health/wellnes

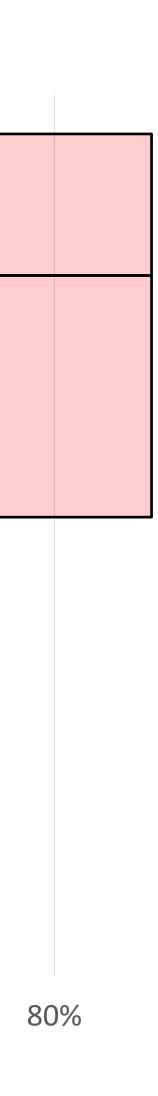
Attending professional sports (lar

Music

Ca



Food and cuisine 40.5% 27.8% Wine 28.3% 15.8% rts (pop/rock/hip hop, etc.) 27.1% 15.1% Hiking (day hikes) 28.0% 14.1% Hiking (day hikes) 28.0% 14.1% theme or amusement parks 22.0% 17.5% Art museums 26.2% 13.0% roff Broadway productions) 26.6% 12.5% (classical, symphonies, etc.) 24.0% 14.4% rs (exercise/spas/yoga, etc.) 21.8% 15.3% Photography 20.6% 14.8% Camping 22.0% 15.3% festivals (multi-day events) 22.3% 11.5% Fashion 21.1% 11.8%				
Wine 28.3% 15.8% rts (pop/rock/hip hop, etc.) 27.1% 15.1% Hiking (day hikes) 28.0% 14.1% theme or amusement parks 22.0% 17.5% Art museums 26.2% 13.0% off Broadway productions) 26.6% 12.5% (classical, symphonies, etc.) 21.8% 15.3% ss (exercise/spas/yoga, etc.) 21.8% 15.3% rge-venue, like NFL or MLB) 20.9% 12.5% Camping 22.0% 12.5% Craft beers 22.8% 11.5% festivals (multi-day events) 22.3% 11.8% anoeing, kayaking or rafting 22.3% 10.5% Sailing or boating 22.0% 9.9% Recreational vehicle travel 19.7% 11.5%	taking trips outside the USA)	35.7%	6	38.9%
rts (pop/rock/hip hop, etc.) 27.1% 15.1% Hiking (day hikes) 28.0% 14.1% theme or amusement parks 22.0% 17.5% Art museums 26.2% 13.0% off Broadway productions) 26.6% 12.5% (classical, symphonies, etc.) 24.0% 14.4% rge-venue, like NFL or MLB) 20.9% 15.3% Photography 20.6% 14.8% Camping 22.0% 12.5% festivals (multi-day events) 22.3% 11.5% Fashion 21.1% 11.8% anoeing, kayaking or rafting 22.3% 9.9% Recreational vehicle travel 19.7% 11.5%	Food and cuisine	40.	5%	27.8%
Hiking (day hikes)28.0%14.1%theme or amusement parks22.0%17.5%Art museums26.2%13.0%off Broadway productions)26.6%12.5%(classical, symphonies, etc.)24.0%14.4%iss (exercise/spas/yoga, etc.)21.8%15.3%rge-venue, like NFL or MLB)20.9%15.3%Photography20.6%14.8%Camping22.0%12.5%Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.0%9.9%Recreational vehicle travel19.7%11.5%	Wine	28.3%	15.8%	
theme or amusement parks Art museums 26.2% 17.5% Art museums 26.6% 12.5% (classical, symphonies, etc.) 24.0% 14.4% (classical, symphonies, etc.) 24.0% 14.4% (classical, symphonies, etc.) 24.0% 14.4% 15.3% rge-venue, like NFL or MLB) 20.9% 15.3% Photography 20.6% 14.8% Camping 22.0% 12.5% Craft beers 22.8% 11.5% festivals (multi-day events) Fashion 21.1% 11.8% anoeing, kayaking or rafting 22.3% 10.5% Sailing or boating 22.0% 9.9% Recreational vehicle travel 19.7% 11.5%	erts (pop/rock/hip hop, etc.)	27.1%	15.1%	
Art museums26.2%13.0%off Broadway productions)26.6%12.5%(classical, symphonies, etc.)24.0%14.4%ss (exercise/spas/yoga, etc.)21.8%15.3%rge-venue, like NFL or MLB)20.9%15.3%Photography20.6%14.8%Camping22.0%12.5%Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.0%9.9%Sailing or boating22.0%11.5%	Hiking (day hikes)	28.0%	14.1%	
off Broadway productions)26.6%12.5%(classical, symphonies, etc.)24.0%14.4%(classical, symphonies, etc.)21.8%15.3%rge-venue, like NFL or MLB)20.9%15.3%Photography20.6%14.8%Camping22.0%12.5%Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.0%9.9%Recreational vehicle travel19.7%11.5%	theme or amusement parks	22.0%	17.5%	
(classical, symphonies, etc.) 24.0% 14.4% is (exercise/spas/yoga, etc.) 21.8% 15.3% rge-venue, like NFL or MLB) 20.9% 15.3% Photography 20.6% 14.8% Camping 22.0% 12.5% Craft beers 22.8% 11.5% festivals (multi-day events) 22.3% 11.8% Fashion 21.1% 11.8% anoeing, kayaking or rafting 22.0% 9.9% Recreational vehicle travel 19.7% 11.5%	Art museums	26.2%	13.0%	
ss (exercise/spas/yoga, etc.) 21.8% 15.3% rge-venue, like NFL or MLB) 20.9% 15.3% Photography 20.6% 14.8% Camping 22.0% 12.5% Craft beers 22.8% 11.5% festivals (multi-day events) 22.3% 11.8% Fashion 21.1% 11.8% anoeing, kayaking or rafting 22.0% 9.9% Recreational vehicle travel 19.7% 11.5%	or off Broadway productions)	26.6%	12.5%	
rge-venue, like NFL or MLB) 20.9% 15.3% Photography 20.6% 14.8% Camping 22.0% 12.5% Craft beers 22.8% 11.5% festivals (multi-day events) 22.3% 11.8% Fashion 21.1% 11.8% anoeing, kayaking or rafting 22.3% 10.5% Sailing or boating 22.0% 9.9% Recreational vehicle travel 19.7% 11.5%	(classical, symphonies, etc.)	24.0%	14.4%	
Photography20.6%14.8%Camping22.0%12.5%Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.3%10.5%Sailing or boating22.0%9.9%Recreational vehicle travel19.7%11.5%	ess (exercise/spas/yoga, etc.)	21.8%	15.3%	
Camping22.0%12.5%Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.3%10.5%Sailing or boating22.0%9.9%Recreational vehicle travel19.7%11.5%	arge-venue, like NFL or MLB)	20.9%	15.3%	
Craft beers22.8%11.5%festivals (multi-day events)22.3%11.8%Fashion21.1%11.8%anoeing, kayaking or rafting22.3%10.5%Sailing or boating22.0%9.9%Recreational vehicle travel19.7%11.5%	Photography	20.6%	14.8%	
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Fashion21.1%11.8%anoeing, kayaking or rafting22.3%10.5%Sailing or boating22.0%9.9%Recreational vehicle travel19.7%11.5%	Craft beers	22.8%	11.5%	
anoeing, kayaking or rafting Sailing or boating Recreational vehicle travel 19.7%	c festivals (multi-day events)	22.3%	11.8%	
Sailing or boating22.0%9.9%Recreational vehicle travel19.7%11.5%	Fashion	21.1%	11.8%	
Recreational vehicle travel 19.7% 11.5%	Canoeing, kayaking or rafting	22.3%	10.5%	
	Sailing or boating	22.0%	9.9%	
0% 20% 40% 60%	Recreational vehicle travel	19.7%	11.5%	
	0)% 20	% 40	0% 60



WHAT THEY WANT: LIKELY INTERNATIONAL TRAVELERS

Question: Please tell

us how you want

the places you visit

Affordable - not too expensive Unique - unlike other places

Family-friendly activities and experiences

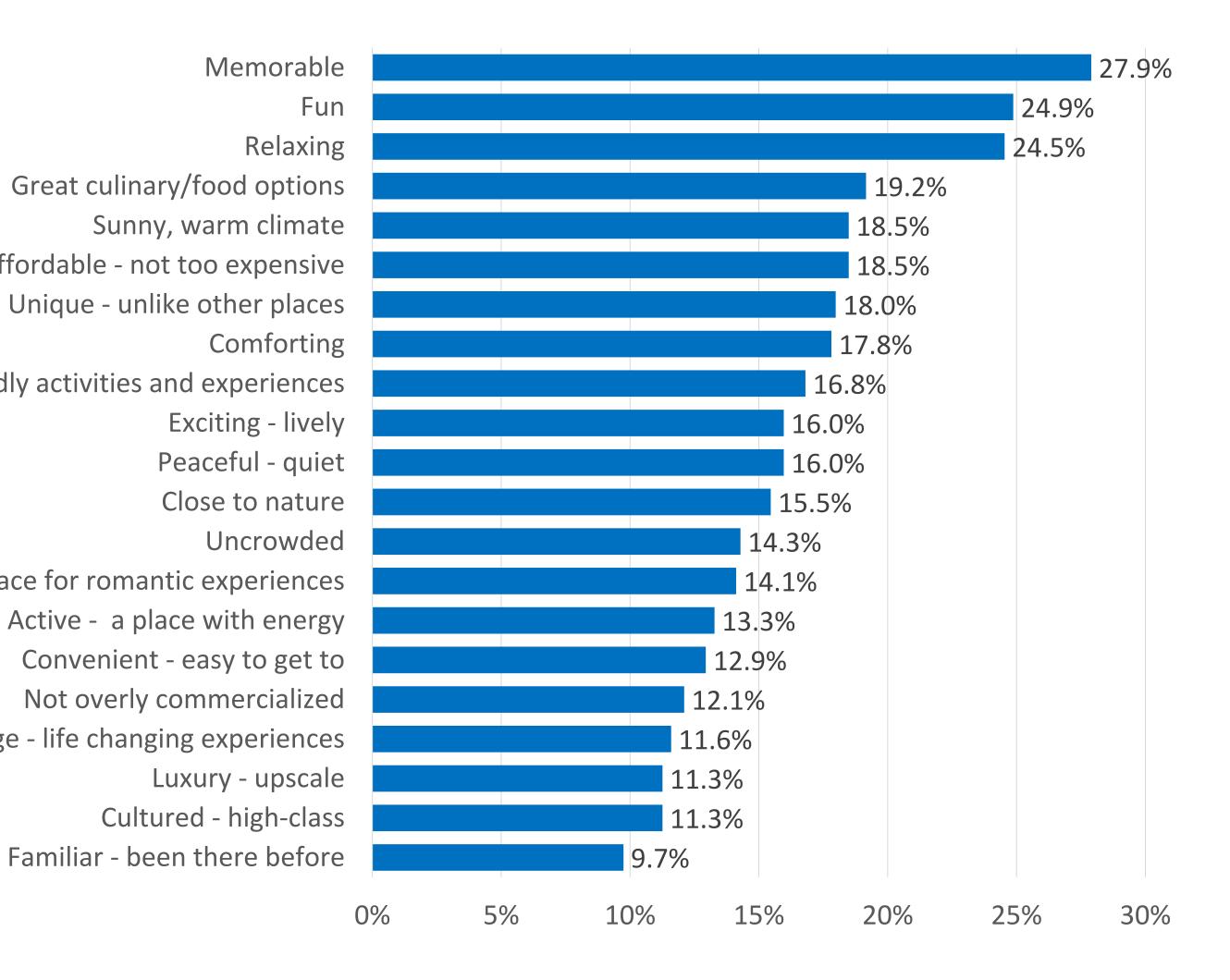
to be. How

important is each

attribute?

A place for romantic experiences Active - a place with energy A place for transformative change - life changing experiences













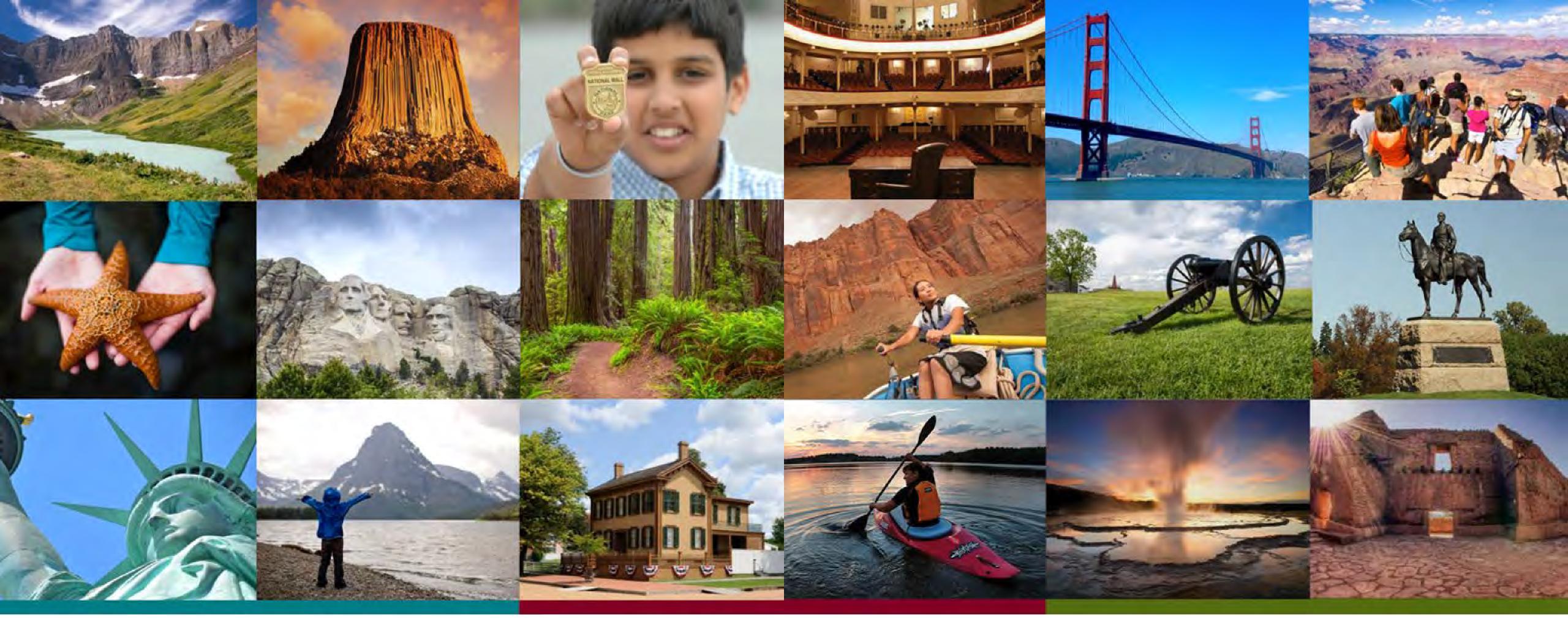


About one-third of American leisure travelers say they are likely to travel abroad in the next 12 months.

This group has extremely high expectations for travel in the upcoming year--and appear be in a quite sound financial situation.

In addition to international travel, these travelers tend to be passionate about food and wine and musical concerts.

Likely International Travelers are authenticity seekers.



NPS Tourism Program **State of the American Traveler** September 2021





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

2016

2017

2018

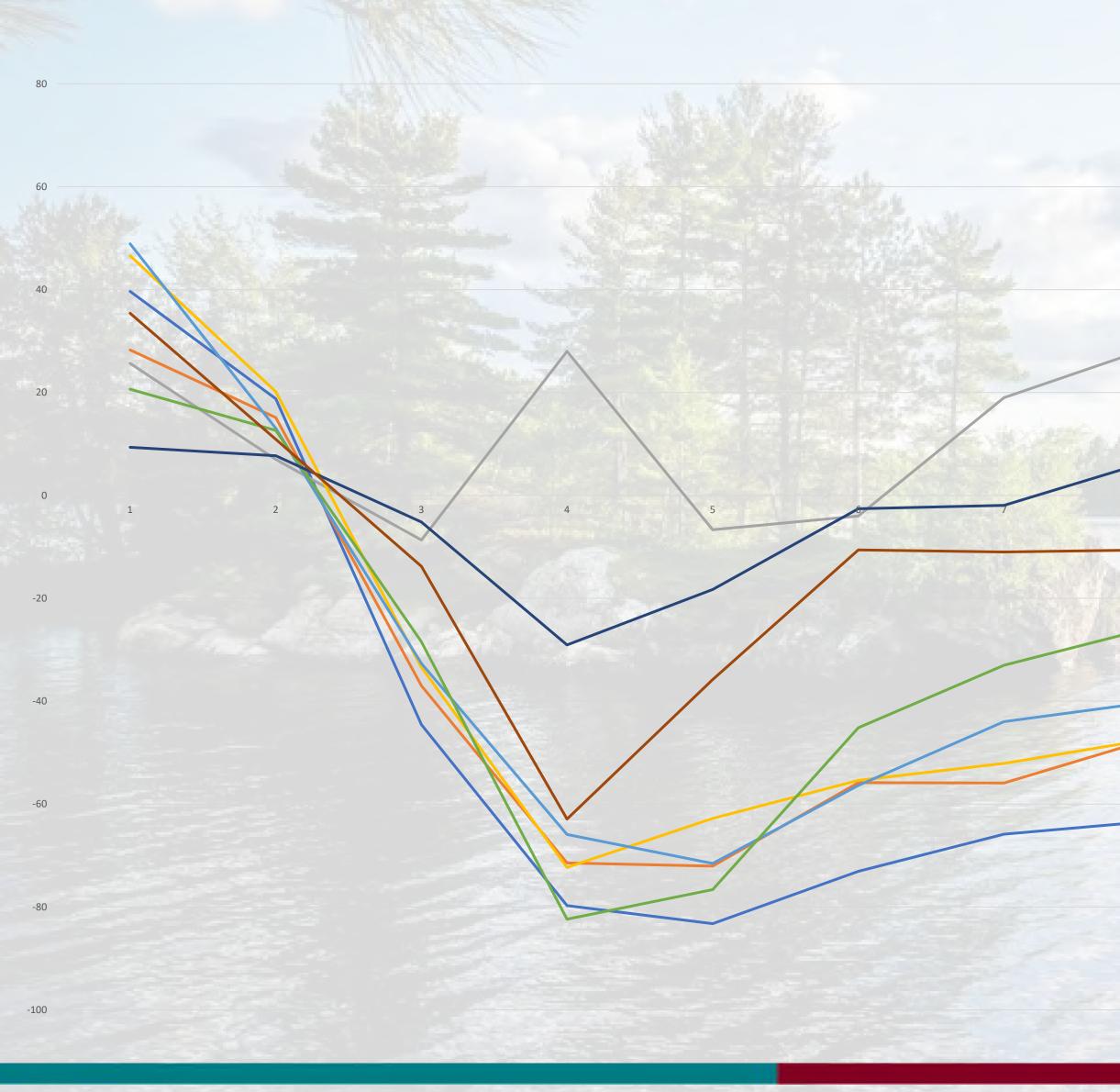
2019

2020

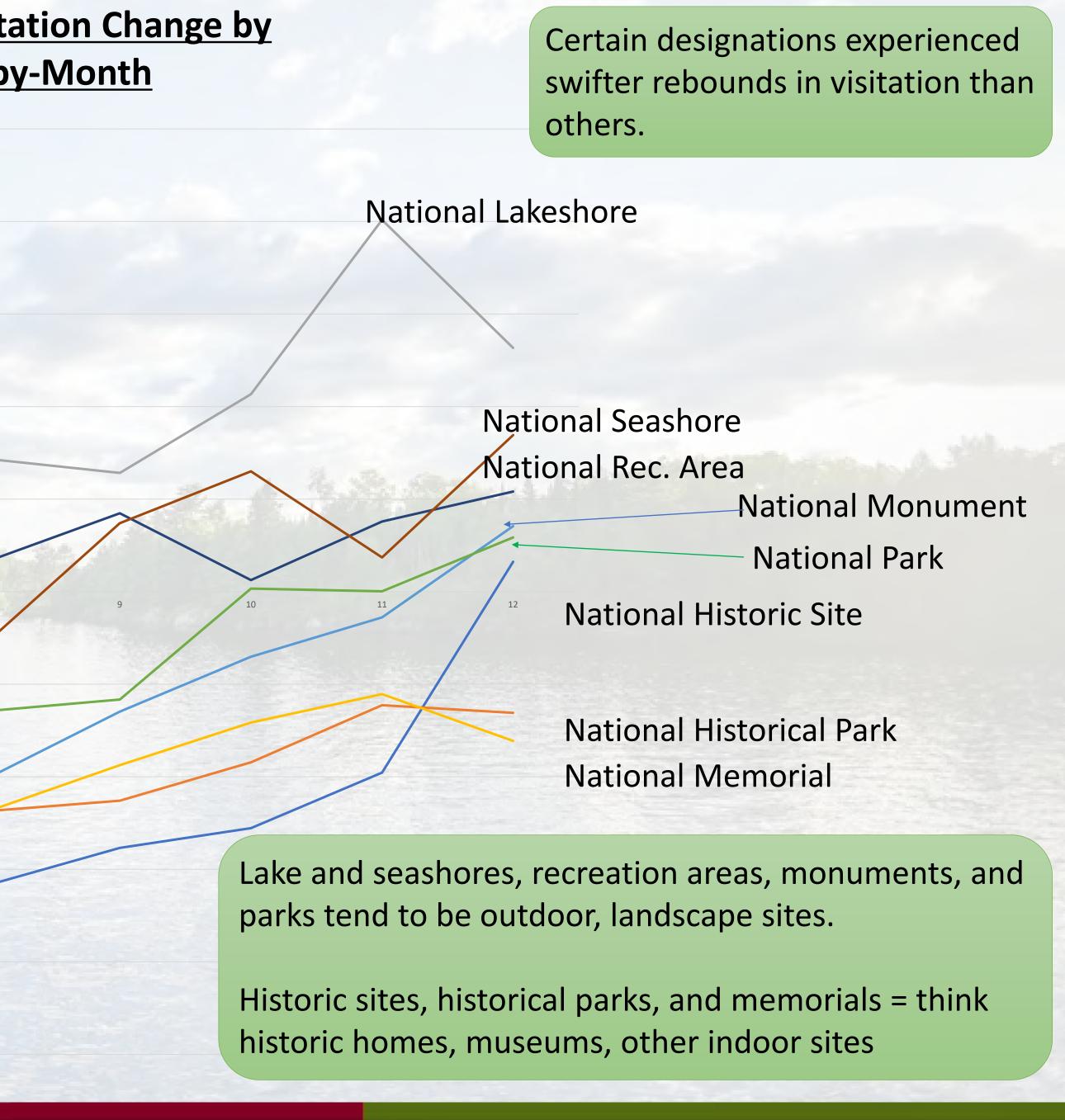


2020 Visitation

Average Percent Visitation Change by Designation Month-by-Month



Source: National Park Service



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

D 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

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

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









2021's Trends

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

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

DP The Denver Post

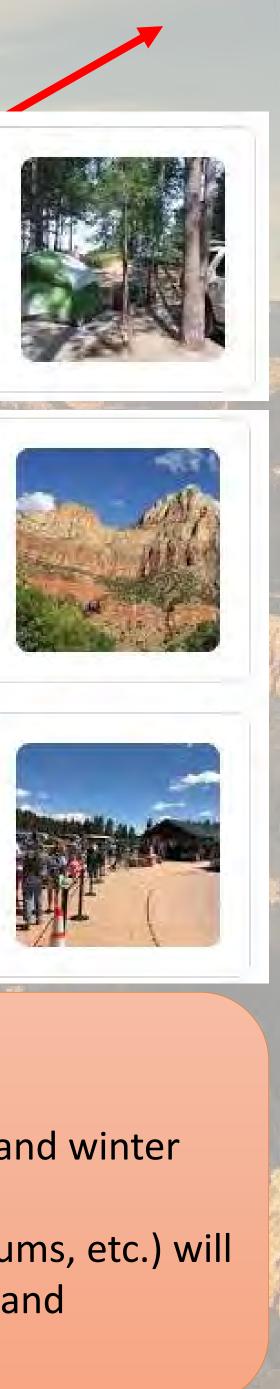
RMNP continues to see increased visitation

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

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...









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



Public Health

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 <u>every</u> page

ankie • **thank you** • shukran • köszönöm • Aatl mahalo • hvala • děkui kk • terima kasi агодарам

lankie • **thank you** • shukran • köszönöm • Aatl • mahalo • hvala • děkui akk • terima kasi нагодарам • racias • m • hv

사 査」によ・dziękuję・obrigada・muliumeso kujim hyll・racie taki korkhin







www.everykidoutdoors.gov



Get your pass 1)

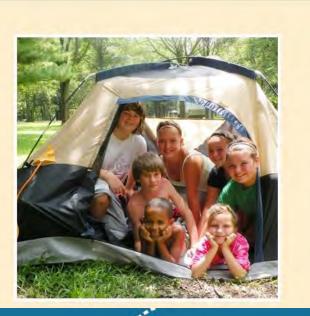
Get and print fourth-grade passes to our national lands and waters.

this.

START

FOURTH GRADERS

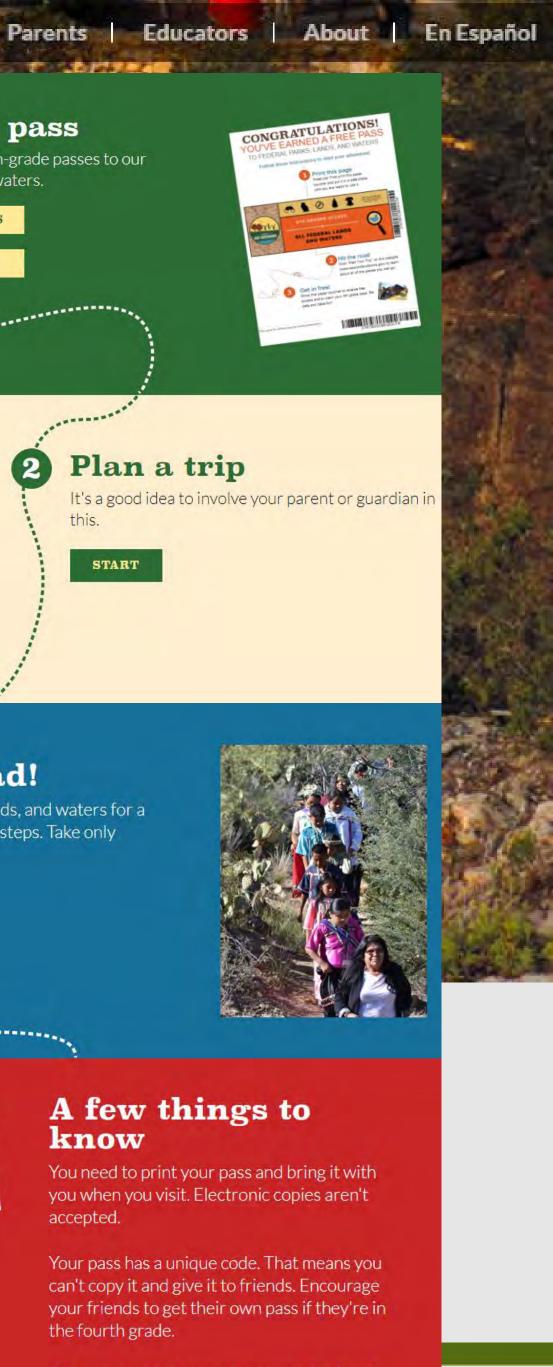
EDUCATORS





Hit the road!

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



* 1 0 1 7 AND WATERS

A few things to know

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

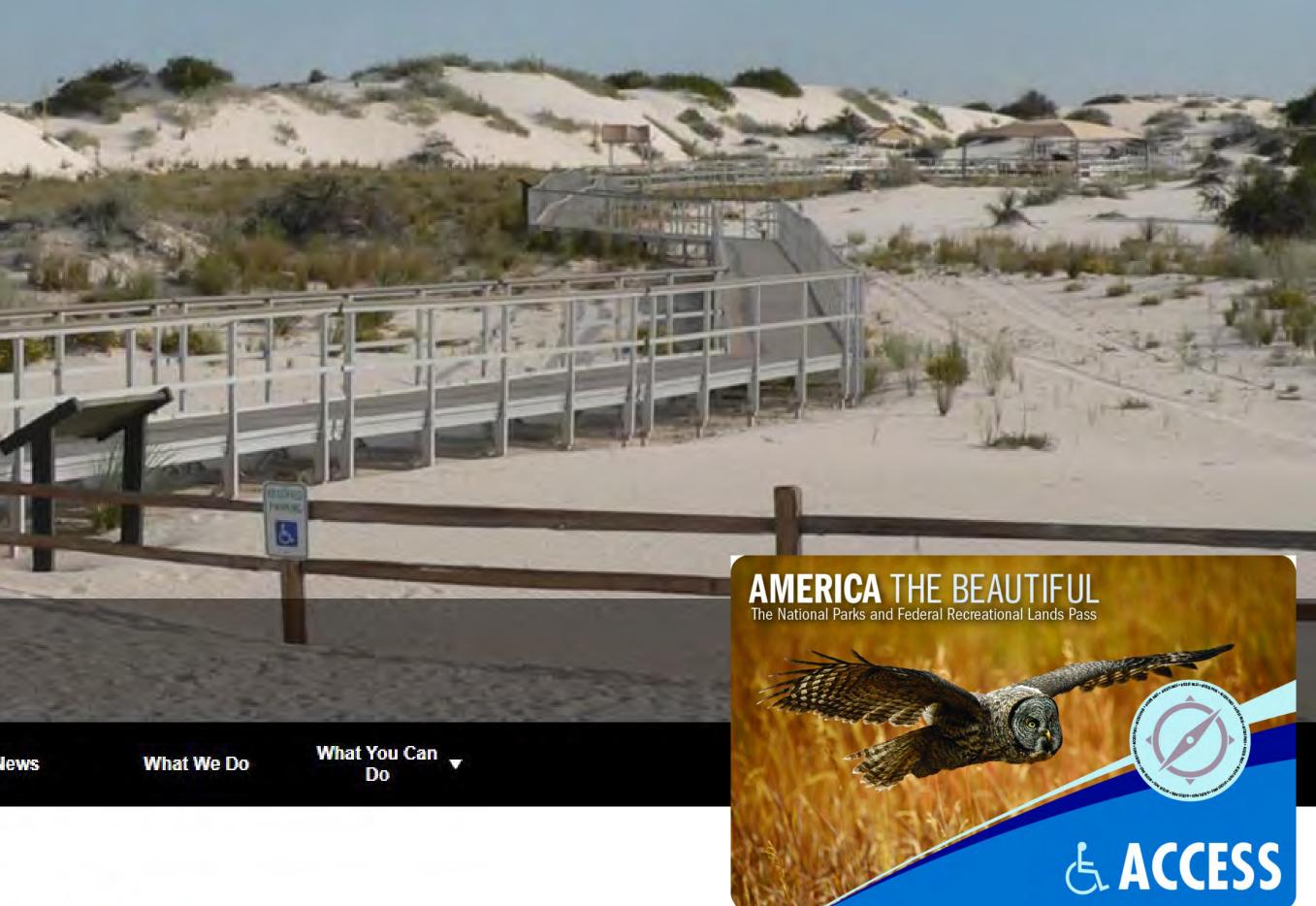
Your pass has a unique code. That means you can't copy it and give it to friends. Encourage your friends to get their own pass if they're in the fourth grade.

This program only provides passes for fourth graders.

Accessibility

Access Pass	
NPS.gov / Home Physical/Mobility >	
Our Commitme Blind/Low Vision	es
Deaf/Hearing Loss	at p
programs, services, and activities Intellectual d	loor
what we do to provide accessibil Service Animals a	I Pa

www.nps.gov/subjects/accessibility



ssibility

t people with disabilities have equal opportunity to benefit from our facilities, fors or outdoors. Discover accessible features in parks and learn more about Park System.

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 syst GAOA Projects at a Glance in national parks is aging and of
- for which it was designed.

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.

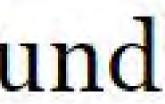
- ✓ Acadia NP Maintenance Facilities Repair
- Y Fort Vancouver NHS Barracks Building Rehabilitation
- Gateway NRA Shoreline Stabilization Structures Replacement ¥ .
- Glacier NP Going-to-the-Sun Road Rehabilitation
- Theodore Roosevelt NP Scenic Loop Repair ¥
- Yellowstone NP Historic Fort Yellowstone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

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





Improvements to railway tour bus staging area – Grand Canyon NP

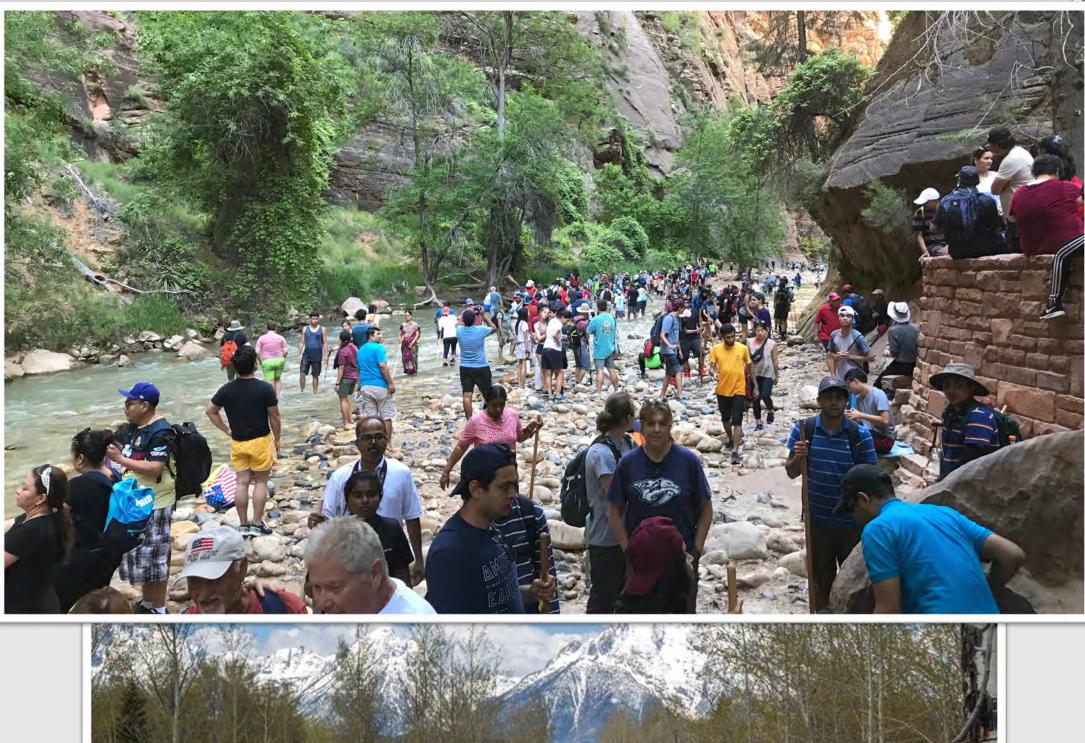




Thank you! Donald_leadbetter@nps.gov



Visitor Management







MPR

National Park Gateway Towns Rethink Promotion Strategies

14.0

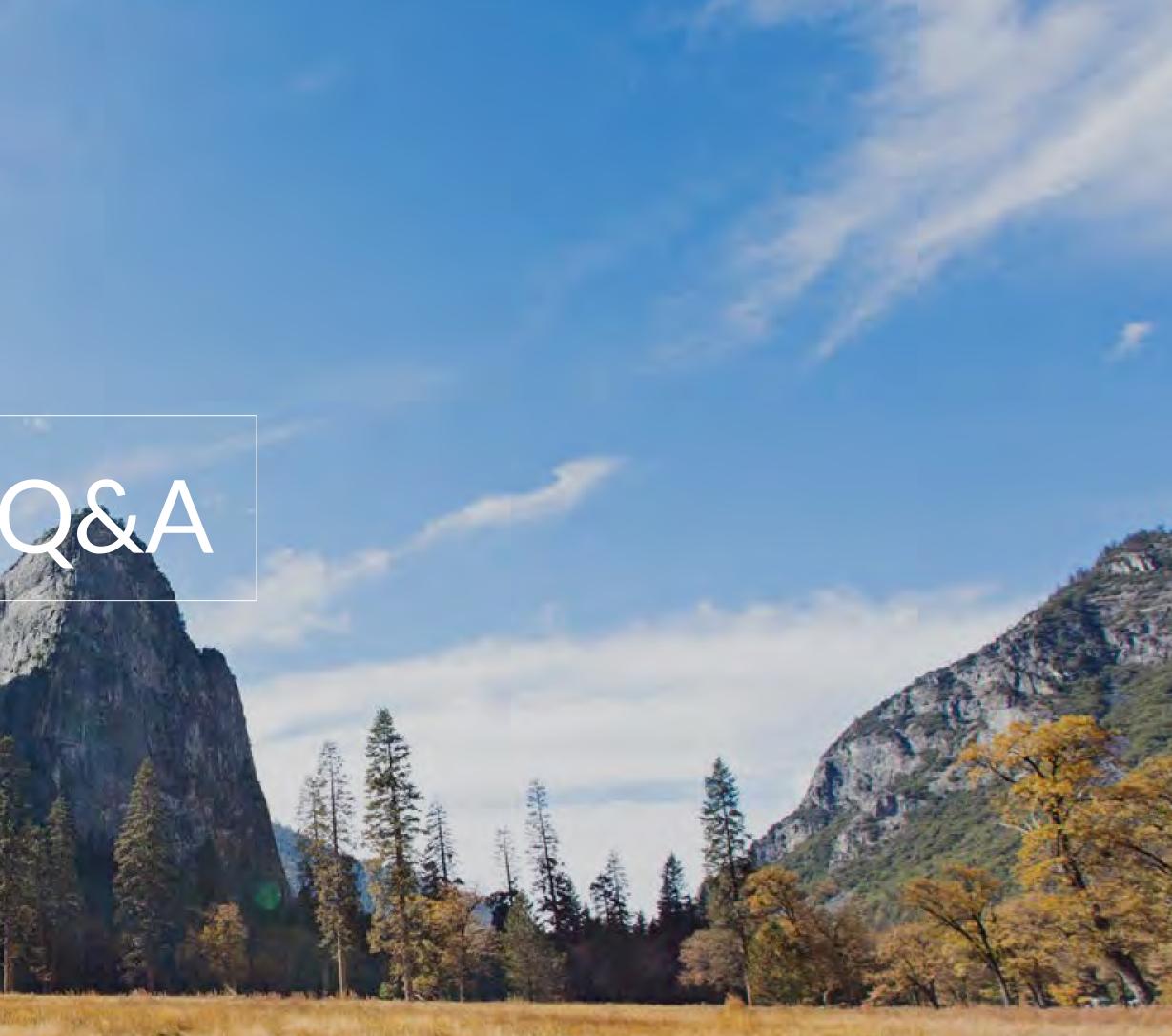
Most days by about 8 a.m., the gates at Arches National Park in Utah close because all the parking lots are full and the trails are at

2 weeks ago



Destination Analysts









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

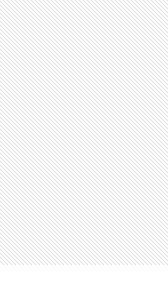
Check out the Online Insights Dashboard, Available Now!

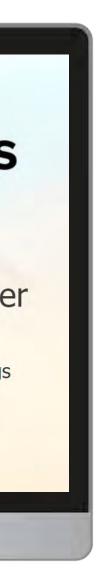
nstructions fo Destination miles unctions & Feature Analysts The State of the American Traveler Dynamic Dashboard of Findings Updated May 2021











COVID-19 COMMUNICATION CENTER

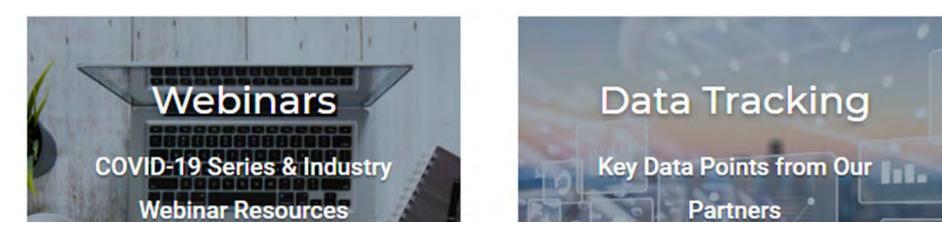


CLARITY IN A TIME OF CHANGE

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.



covid19.milespartnership.com

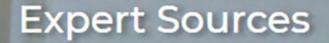
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Home Webinars Insights Data Tracking Expert Sources Funding Futures ~





Insights Blogs, Articles and Resources for Recovery



Authoritative Government, Health and Travel Sources







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

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