

THE STATE OF THE AMERICAN TRAVELER

DESTINATIONS EDITION

MARCH 14, 2023

Destination  Analysts

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THE STATE OF THE AMERICAN TRAVELER: DESTINATIONS EDITION

Research, slides and other resources will be available at

www.milespartnership.com/SAT

www.destinationanalysts.com



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Agenda

1. Current Traveler Sentiment
2. Destinations Edition Research
3. Content That Inspires & Online Video Storytelling
4. Additional Resources
5. Q&A



The State of the American Traveler DESTINATIONS EDITION

March 2023

Destination  Analysts



A nighttime cityscape, likely Dubai, with a dense network of digital lines and nodes overlaid on the scene. The lines are in various colors (blue, purple, pink, white) and connect various points across the city, creating a complex web. The background shows illuminated skyscrapers and city lights.

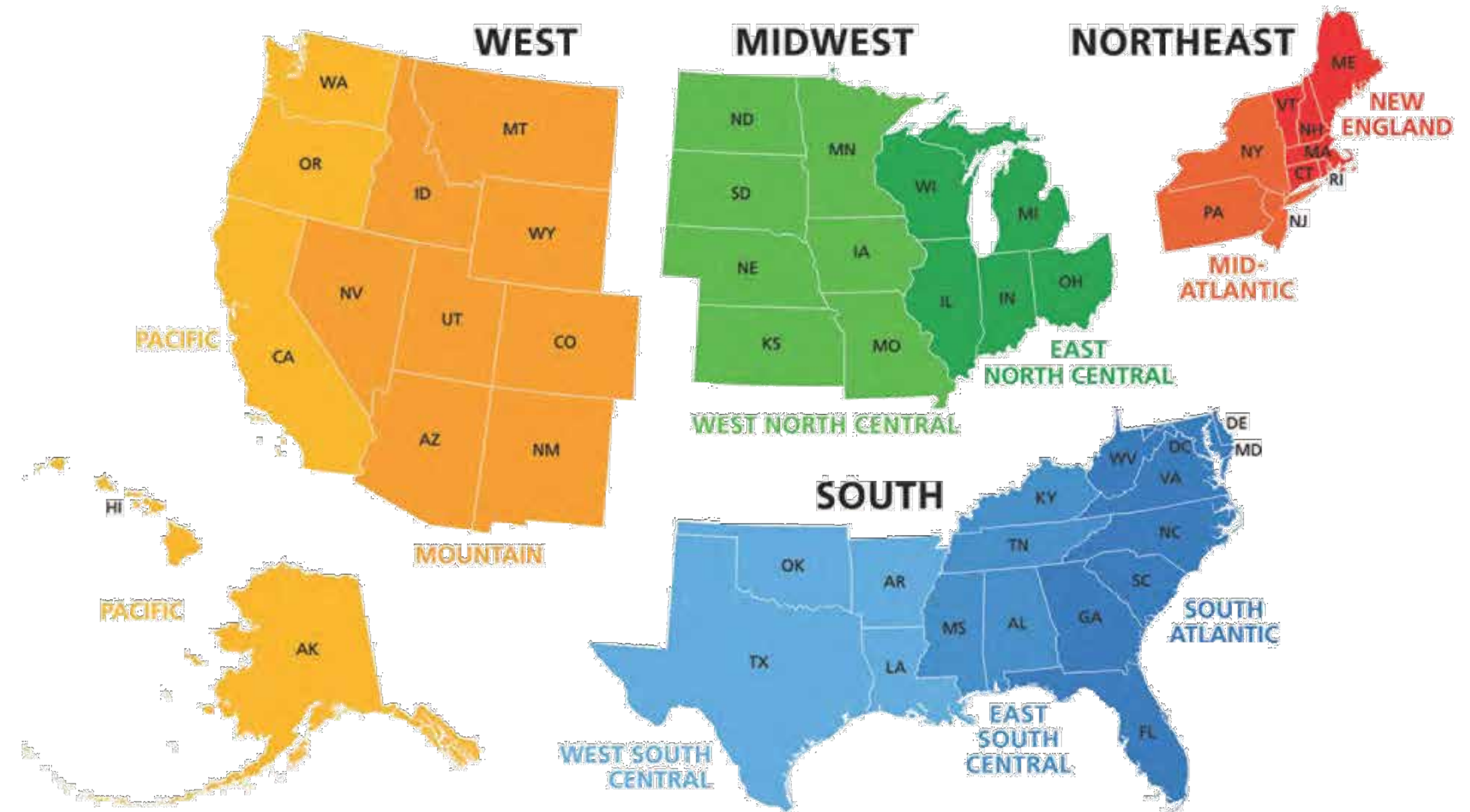
Destination  Analysts

Independent, Unbiased Research

METHODOLOGY

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: **February 15-25**
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region

UNITED STATES CENSUS REGIONS AND DIVISIONS



GENERATIONAL DEFINITIONS



GEN Z

1997 to 2012



GEN X

1965 to 1980



MILLENNIALS

1981 to 1996



BABY BOOMERS

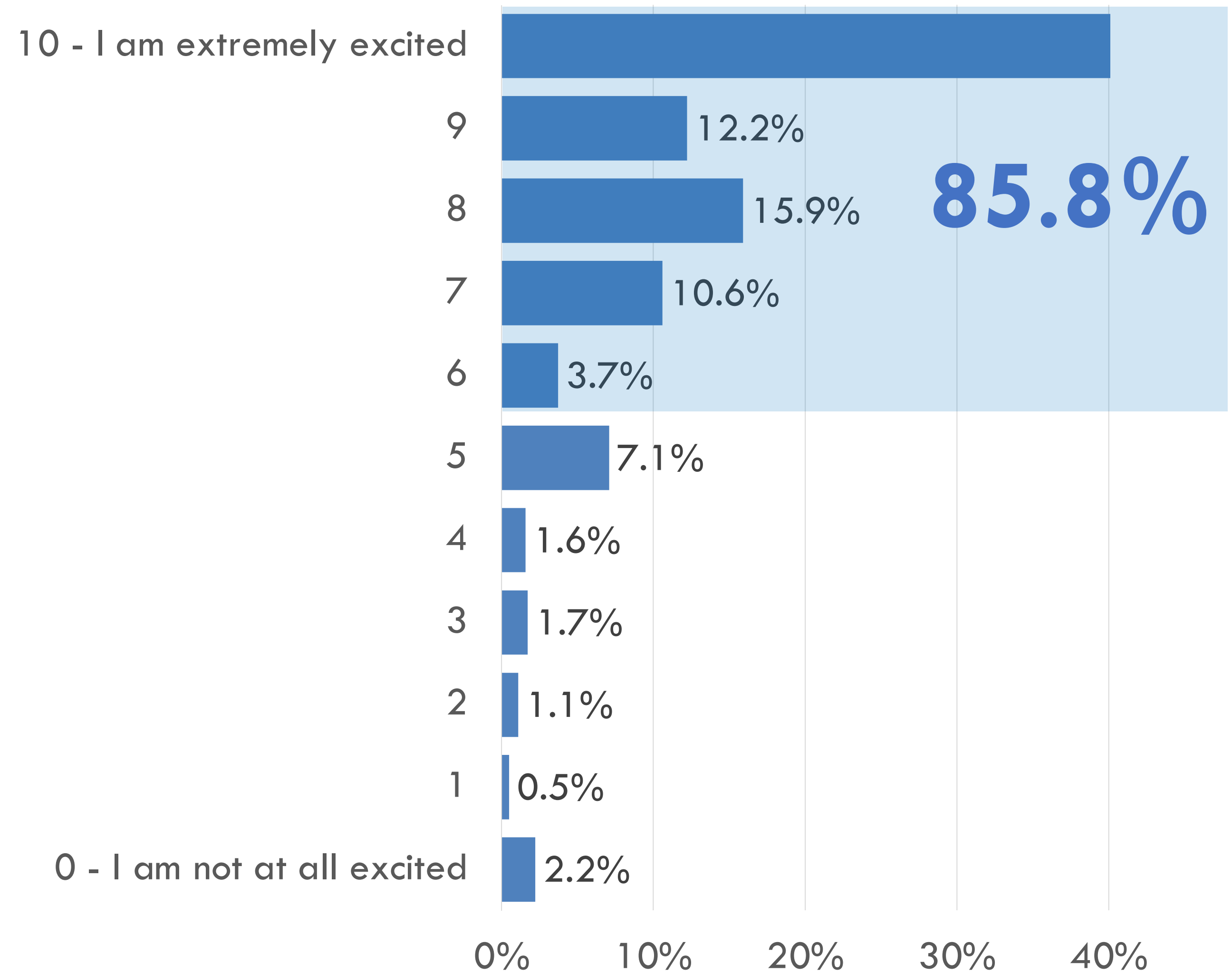
1946 to 1964

Let's Look Forward

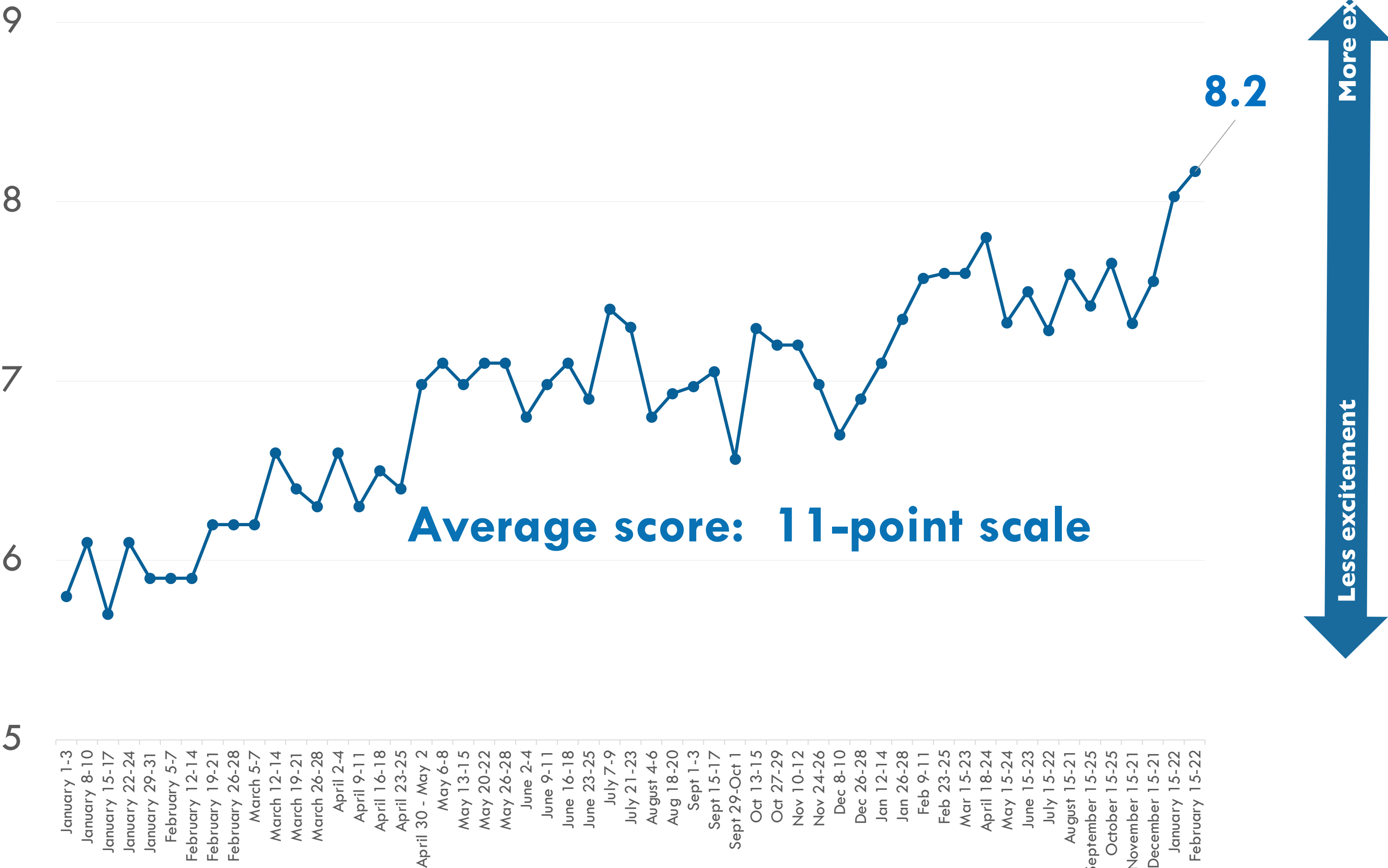


Question:

Which best describes how excited you are about LEISURE TRAVEL in the **NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)**



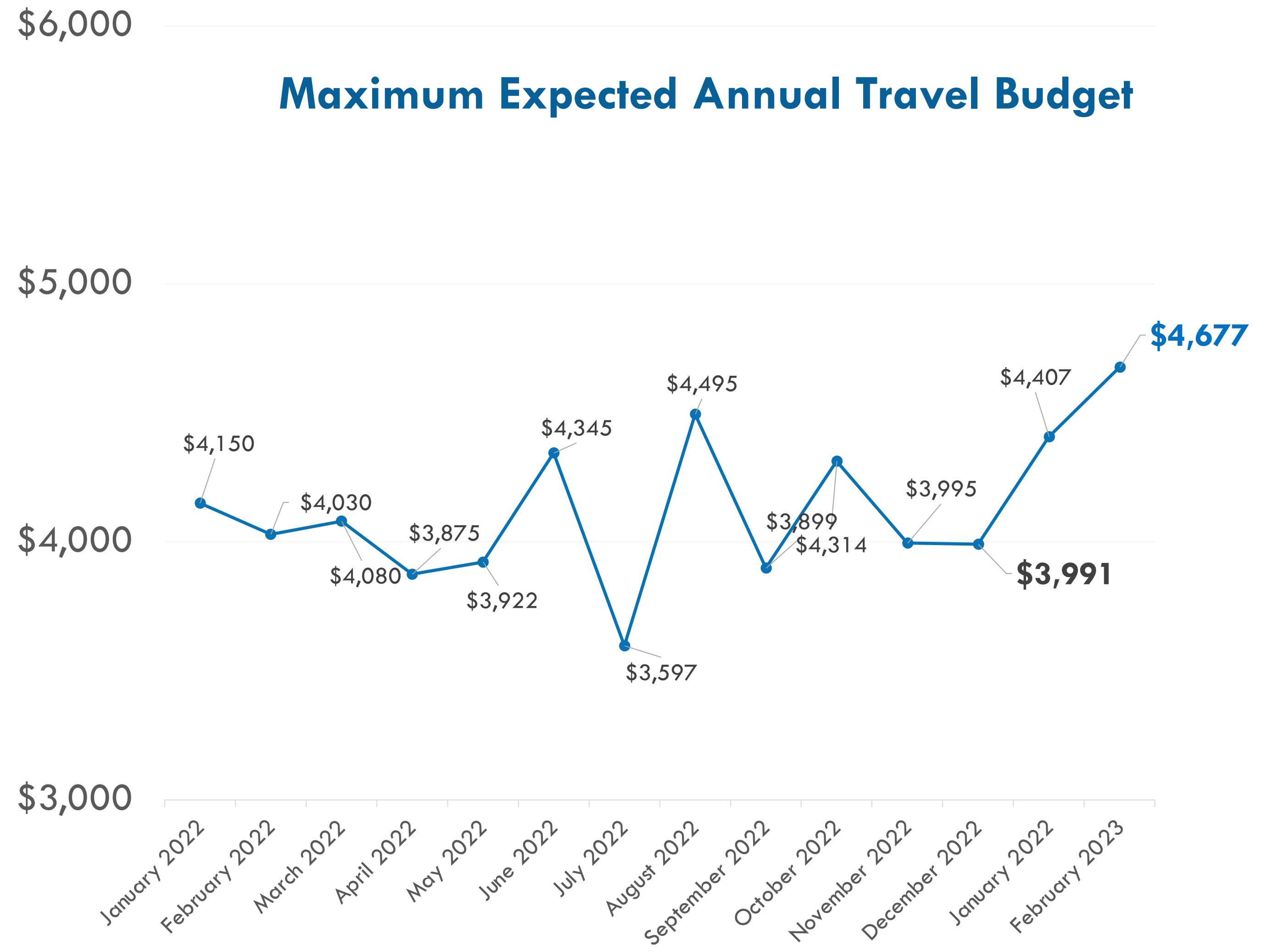
Question: Which best describes how excited you are about **LEISURE TRAVEL** in the **NEXT TWELVE (12) MONTHS?** (Please answer using the 11-point scale below)



Excitement to travel reached record levels.

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 12 MONTHS?

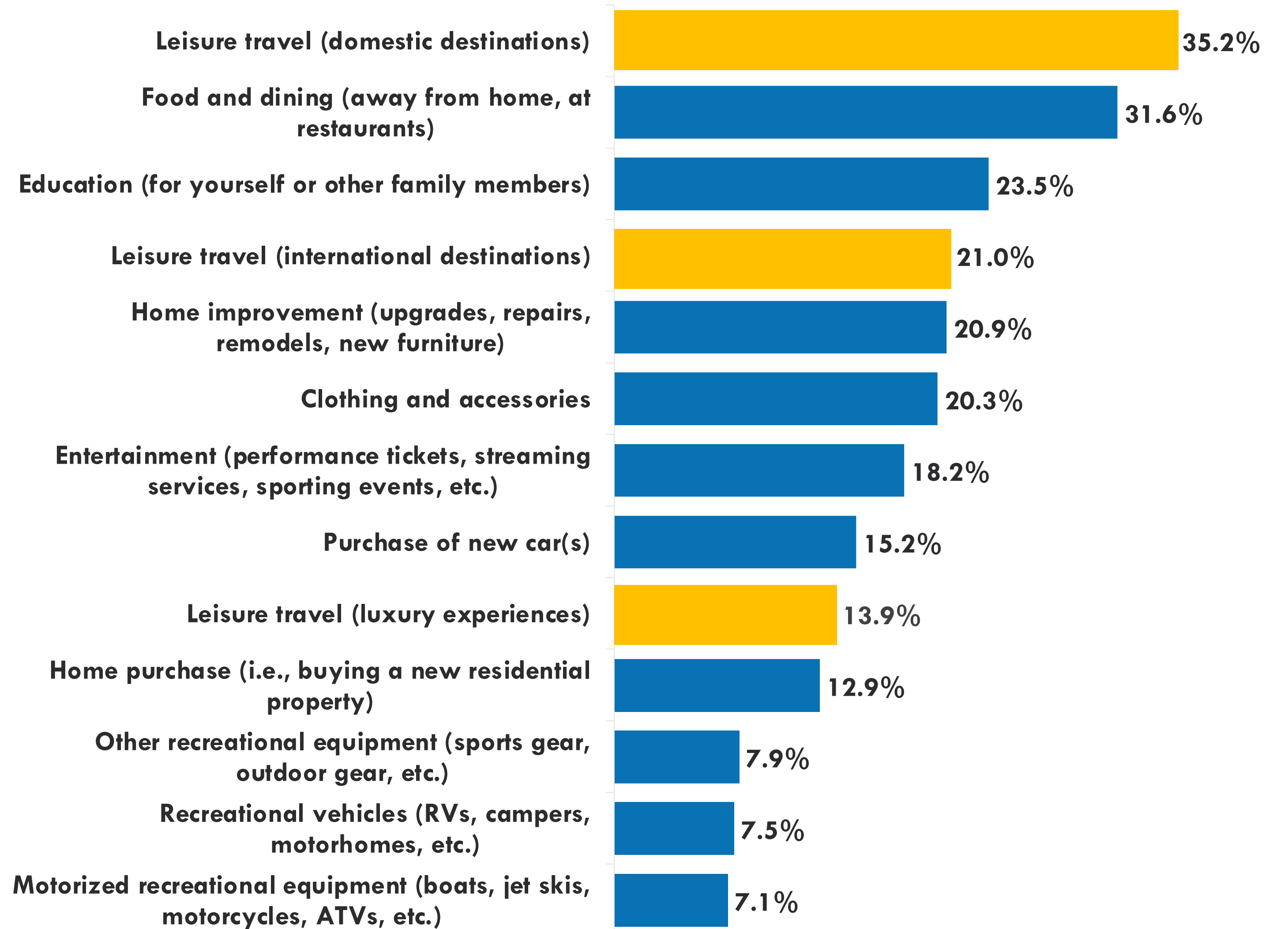


Question:

Please think about how you expect to spend your household income in the **NEXT TWELVE (12) MONTHS**.

Use the scale to tell us how much of a spending priority will each of the following be?

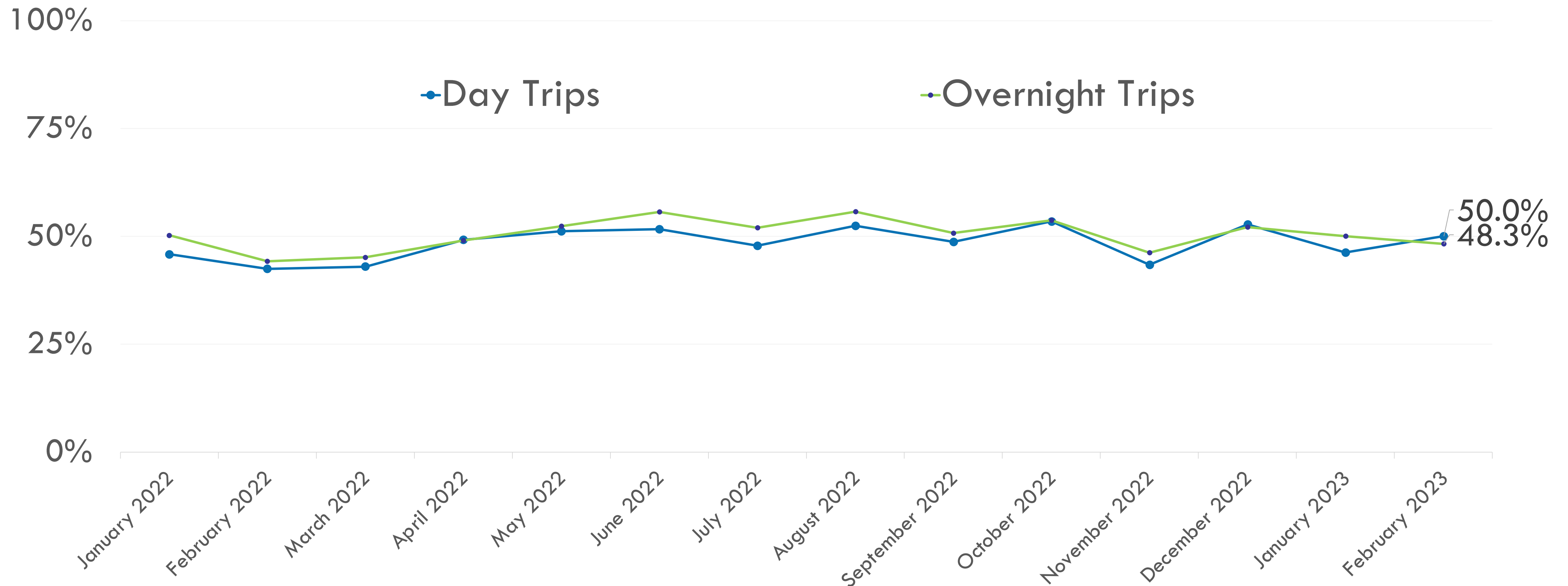
% High Priority or Extremely High Priority



(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

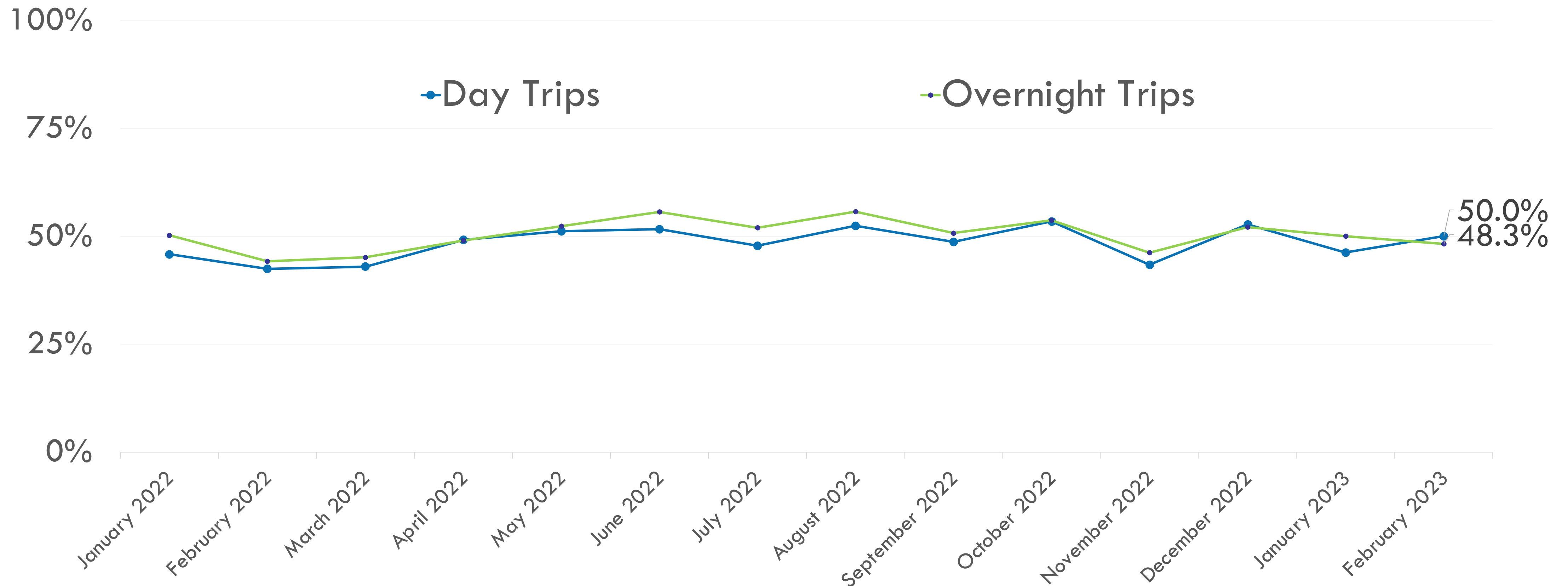
Statement: How many trips have you taken in the past month? (Includes all types of travel)


% of American Travelers Taking at Least One Trip



Statement: How many trips have you taken in the past month? (Includes all types of travel)

% of American Travelers Taking at Least One Trip

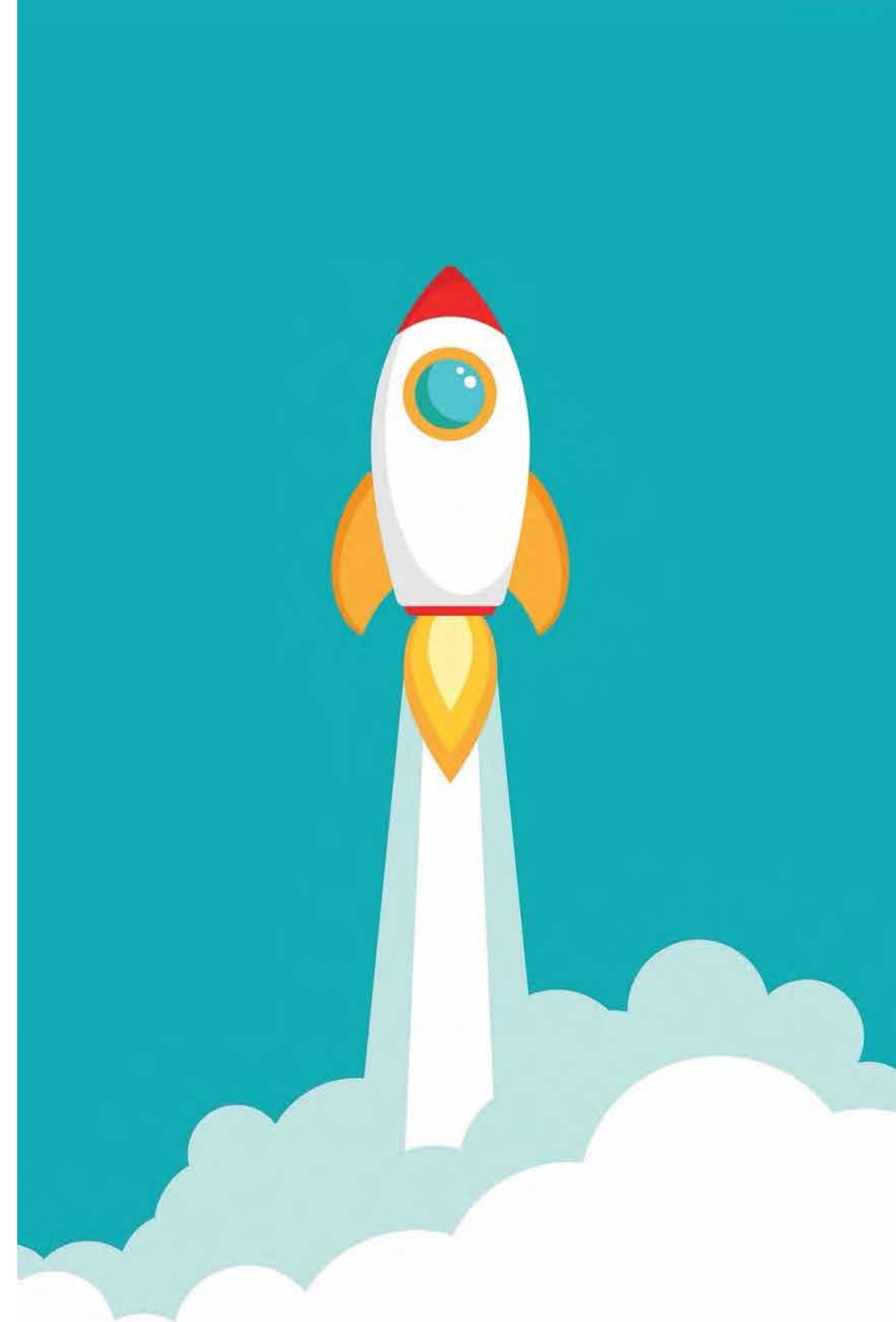




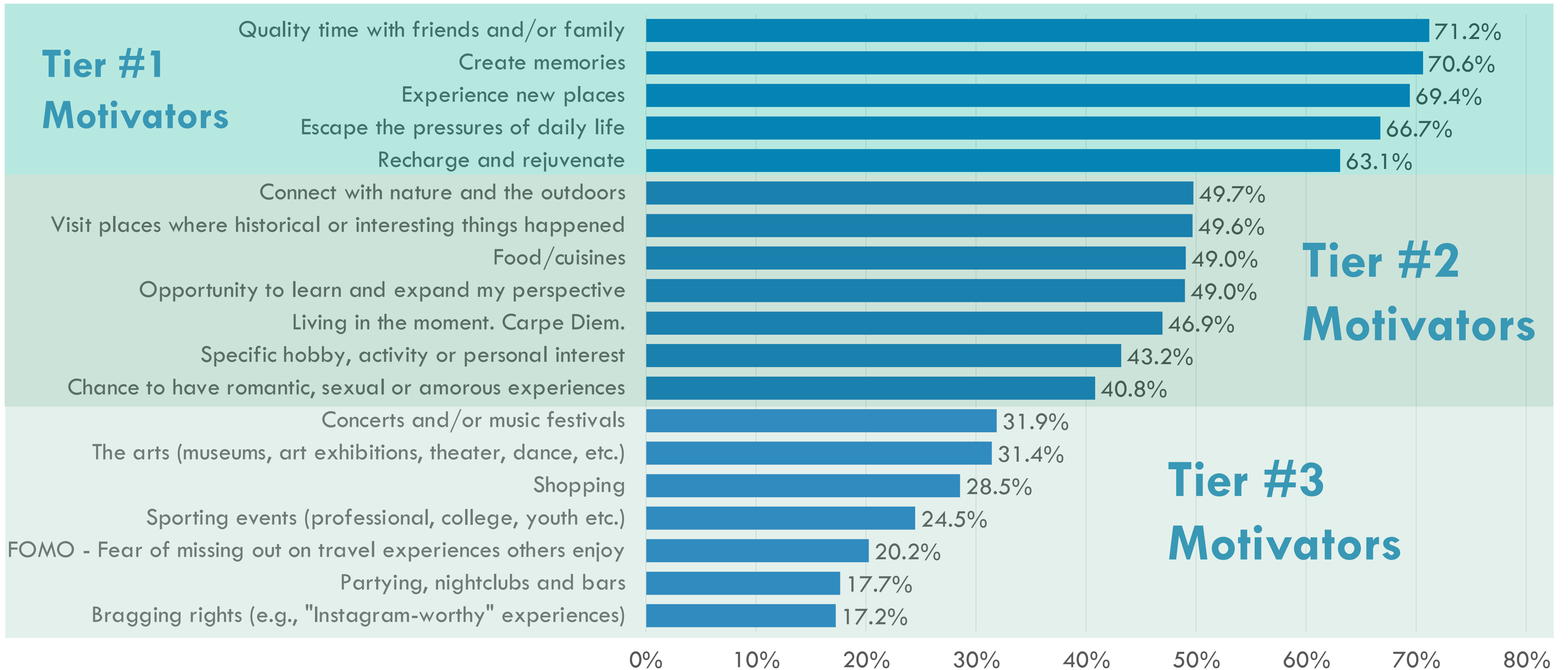
TRAVEL MOTIVATIONS

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now?

- Critically important - It's my rocket fuel!**
- Very motivating**
- Somewhat motivating**
- Slightly motivating**
- Not motivating at all**

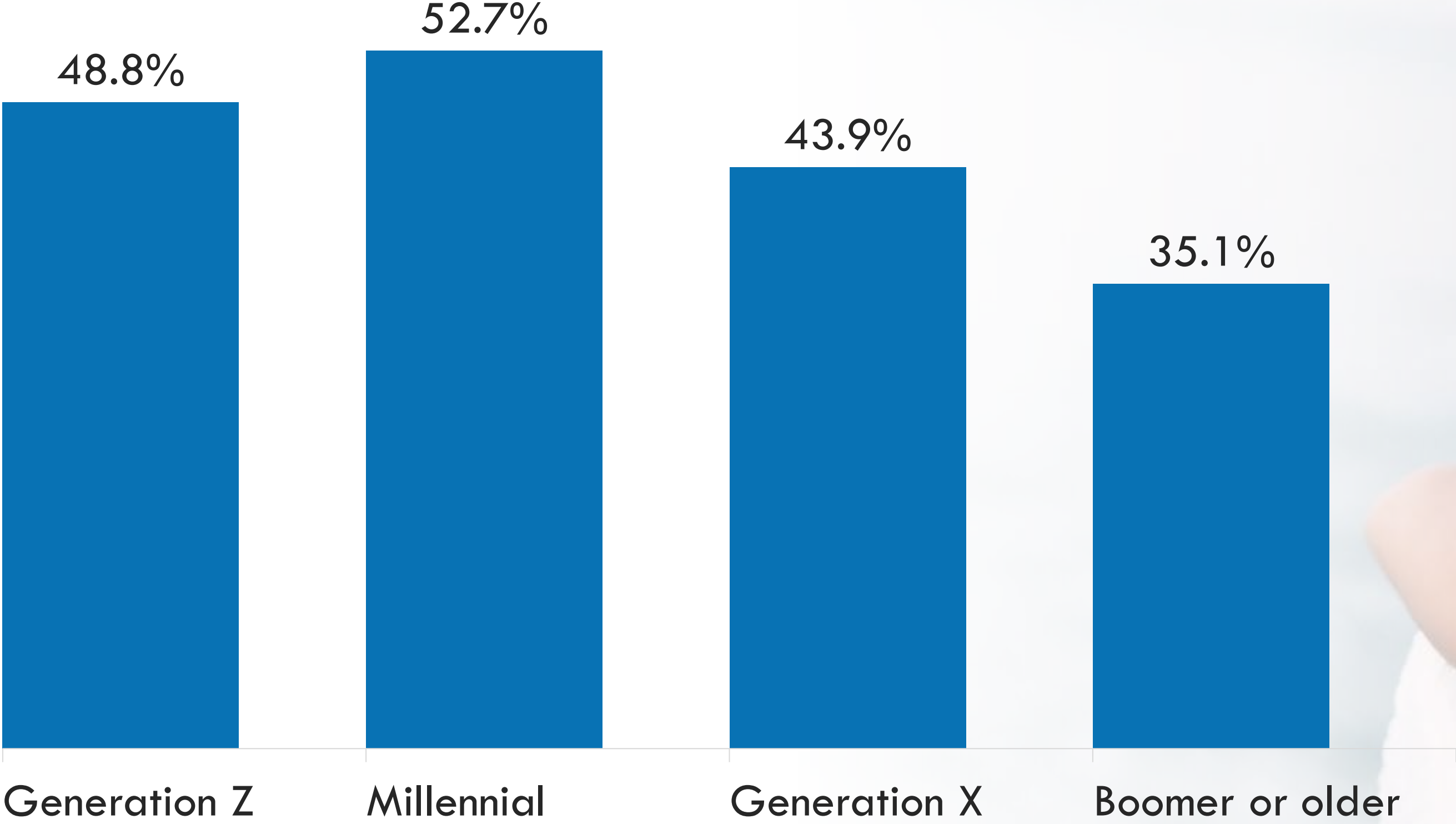


Question: Please think deeply about what motivates you to travel.
What really fuels your desire to travel now?



Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

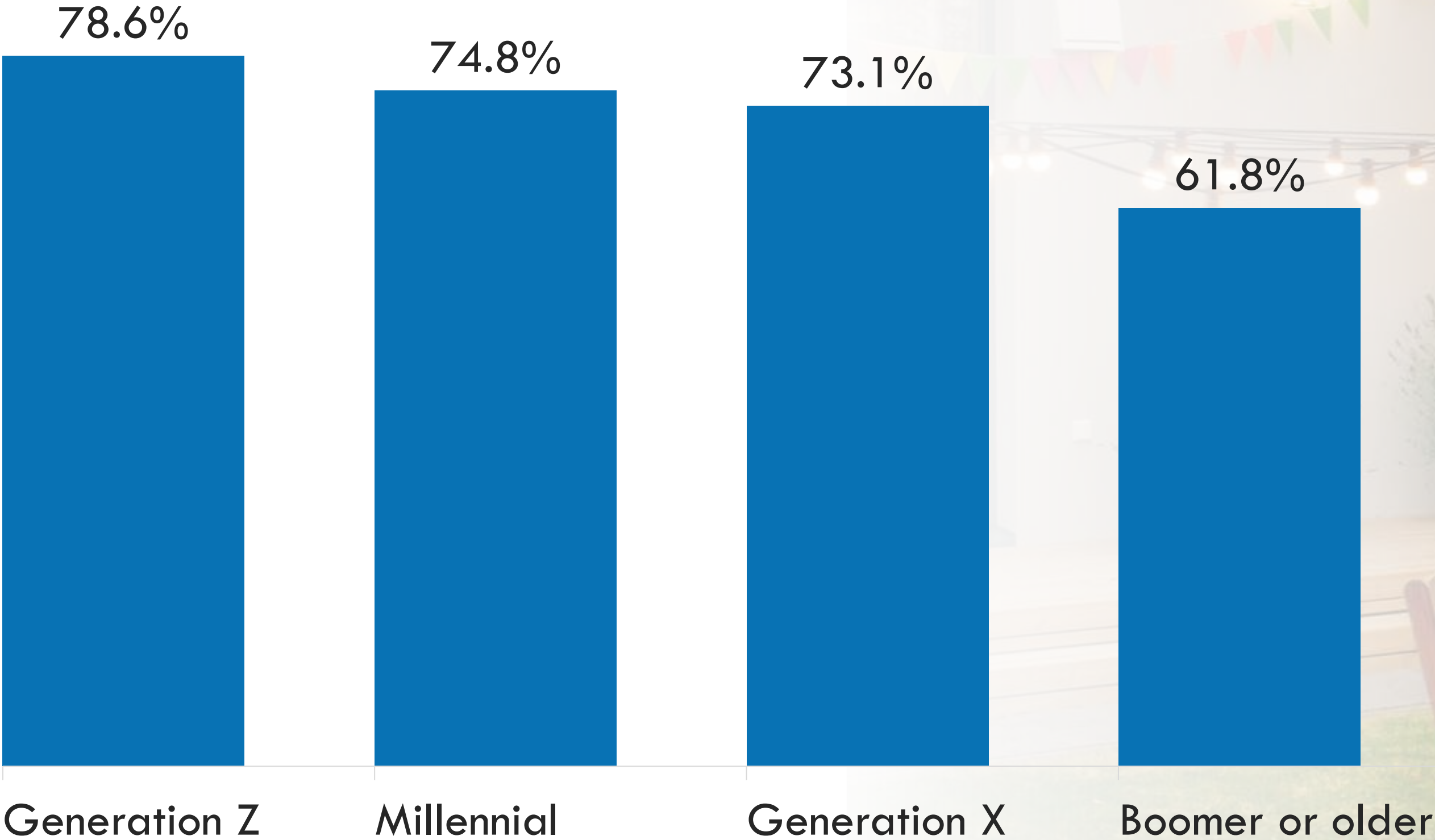
Average for All Motivators



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

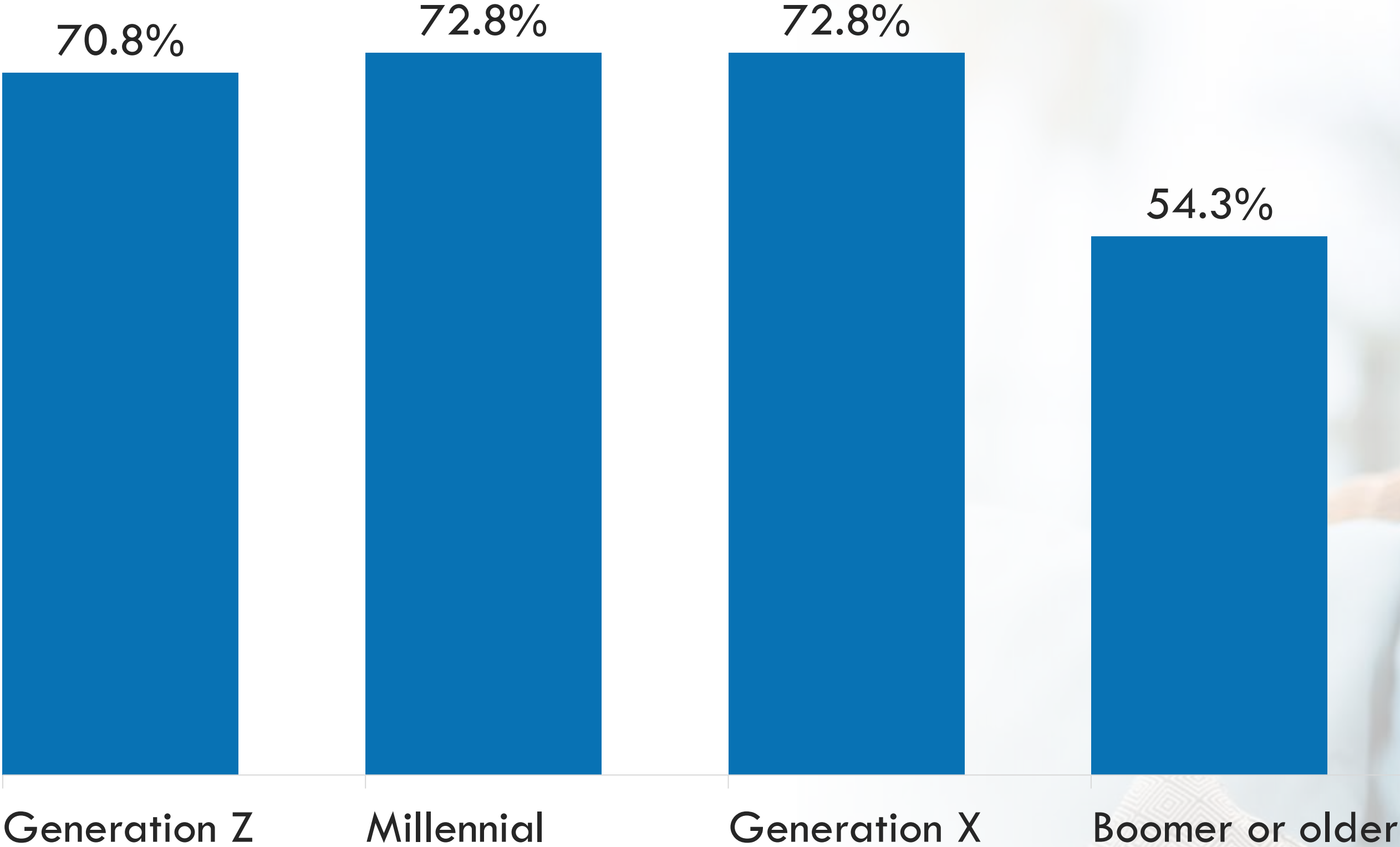
Creating Memories



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

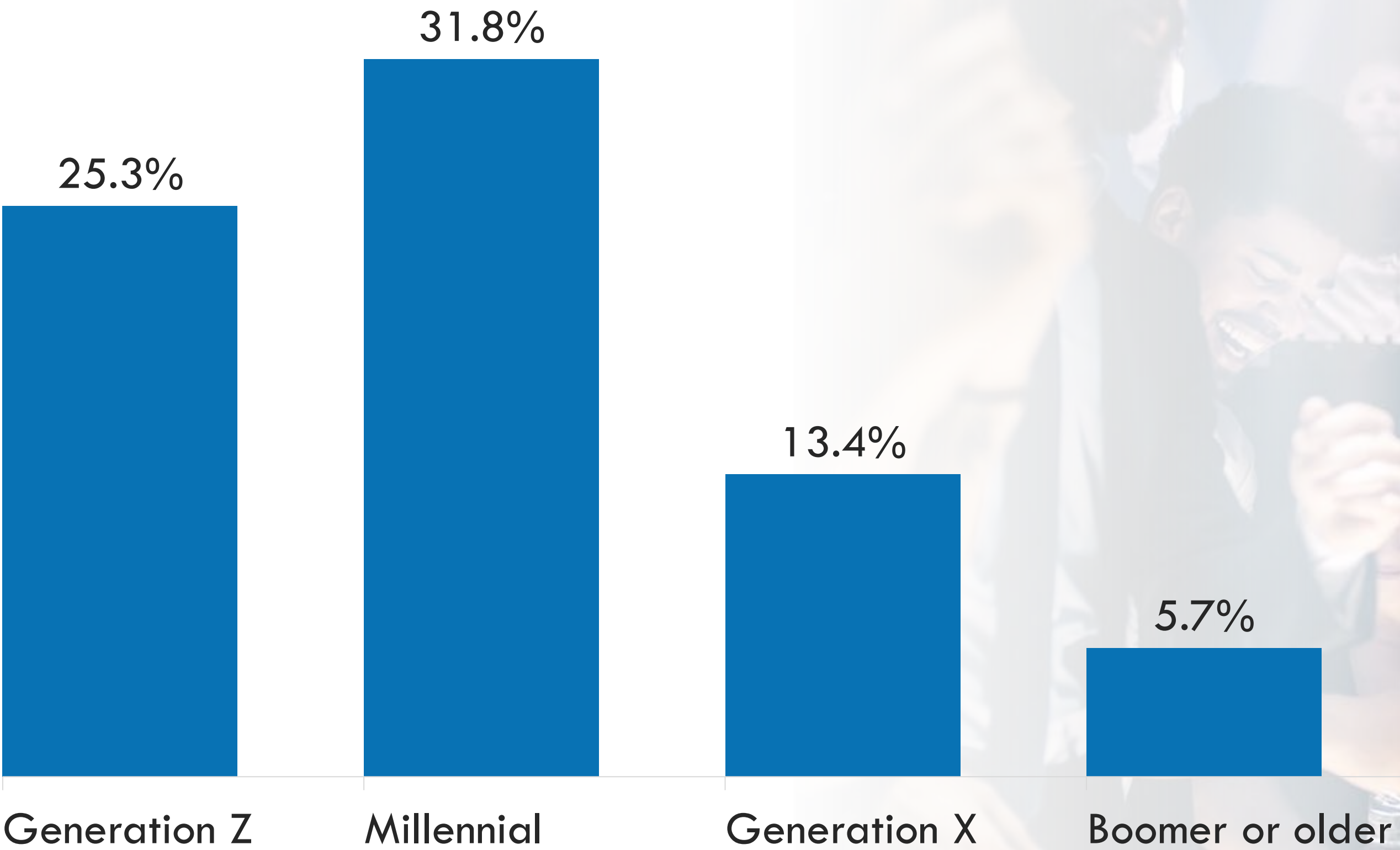
Escape the Pressures of Daily Life



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

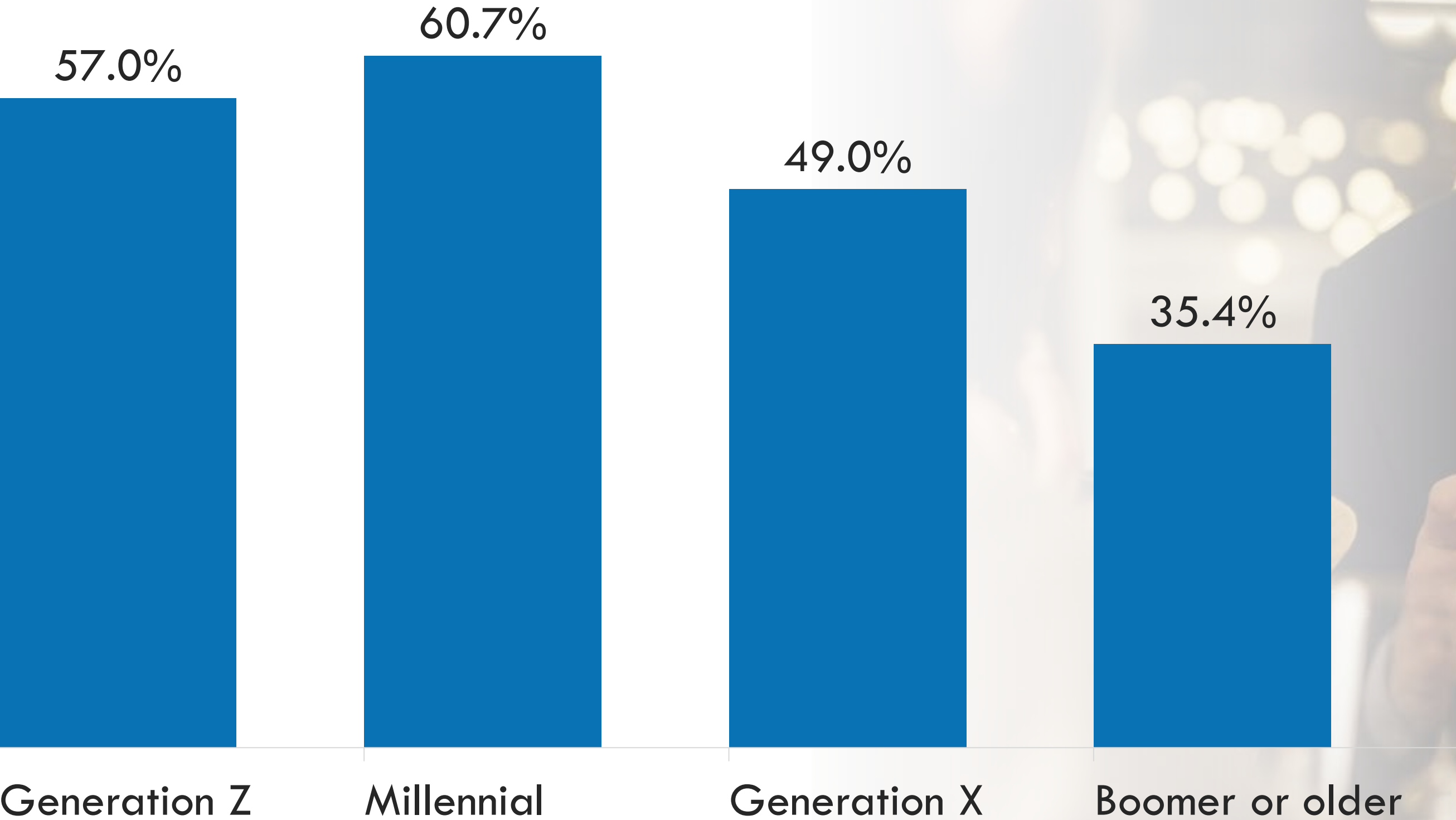
Partying, Nightclubs and Bars



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

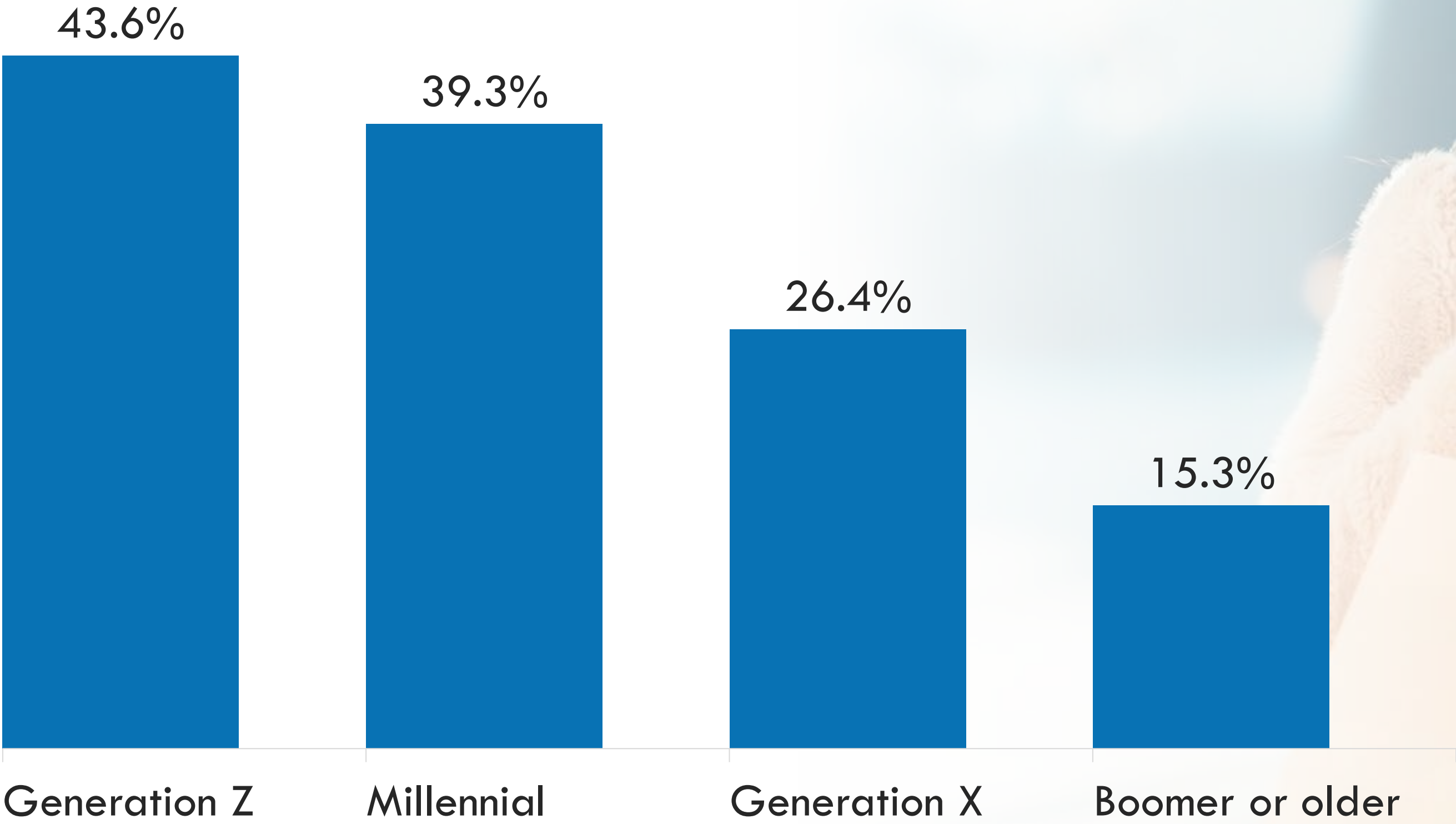
Food/Cuisine



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

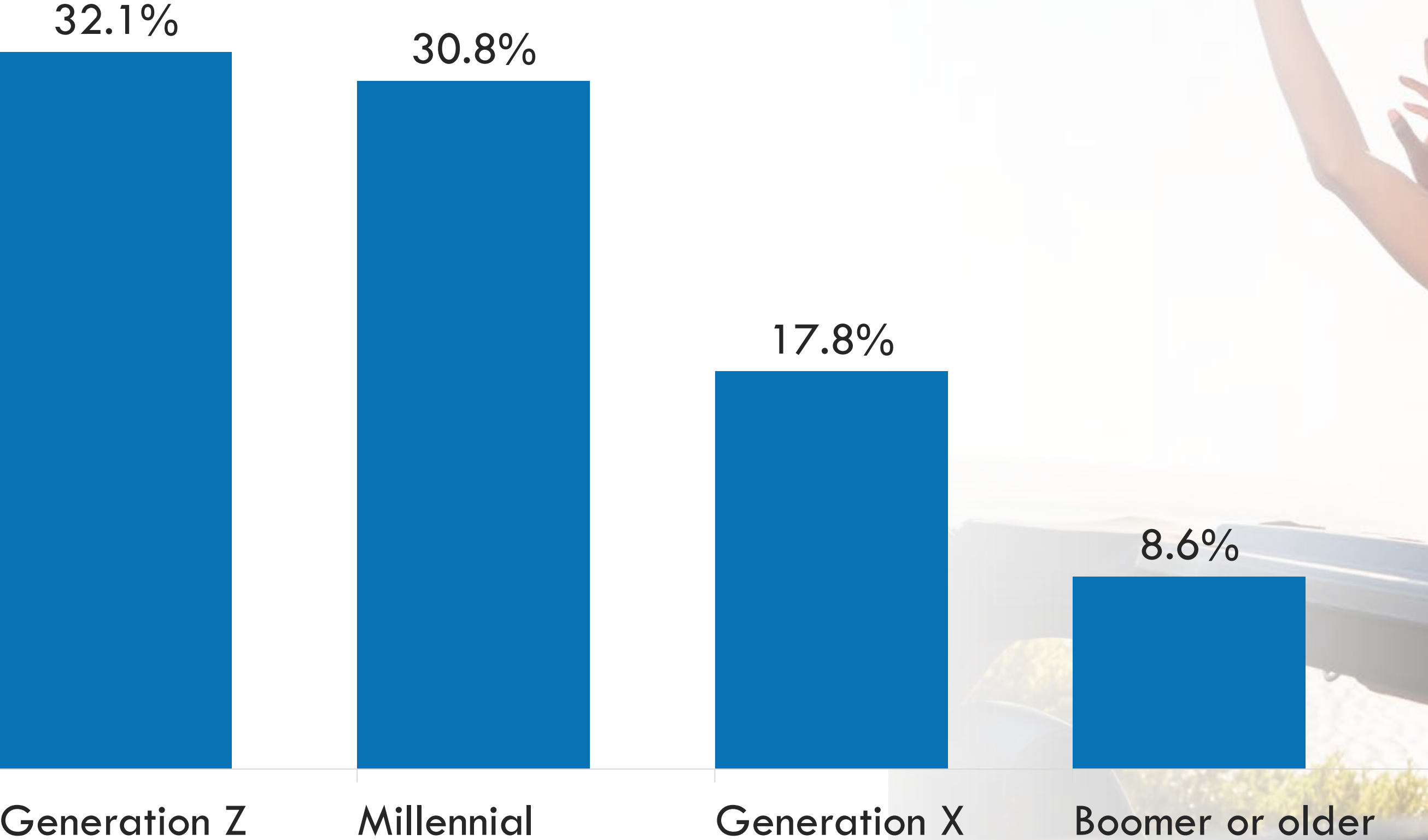
Shopping



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

FOMO - Fear of Missing Out on Travel Experiences Others Enjoy



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Destination Aspiration

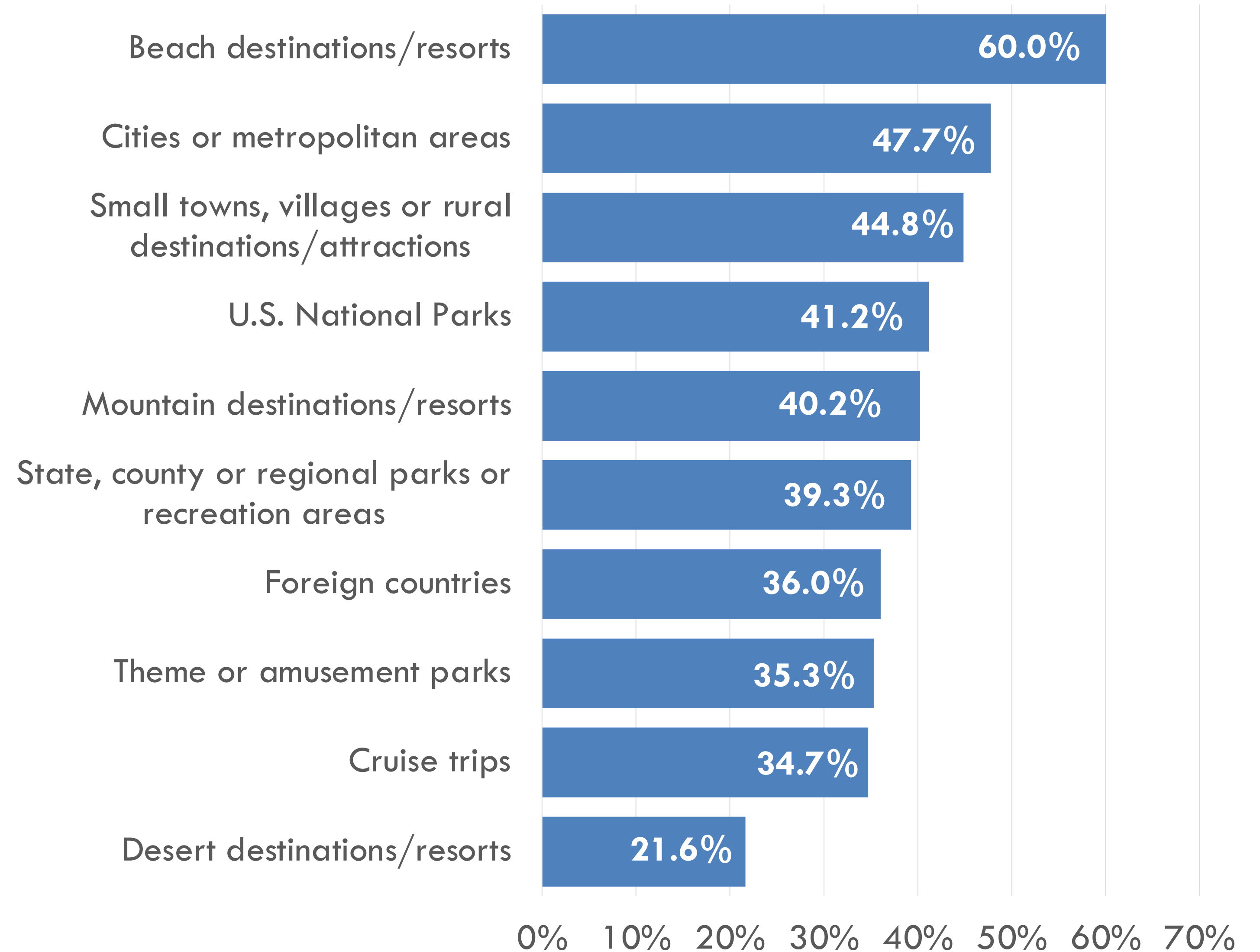


Question:

Thinking carefully about
**THE NEXT TWELVE (12)
MONTHS.**

Use the 10-point scale
where 10 = "Very
excited" and 1 = "Not at
all excited" to state how
generally excited you are
to visit each in the
upcoming year?

% Top 3 Box Score (10-8)

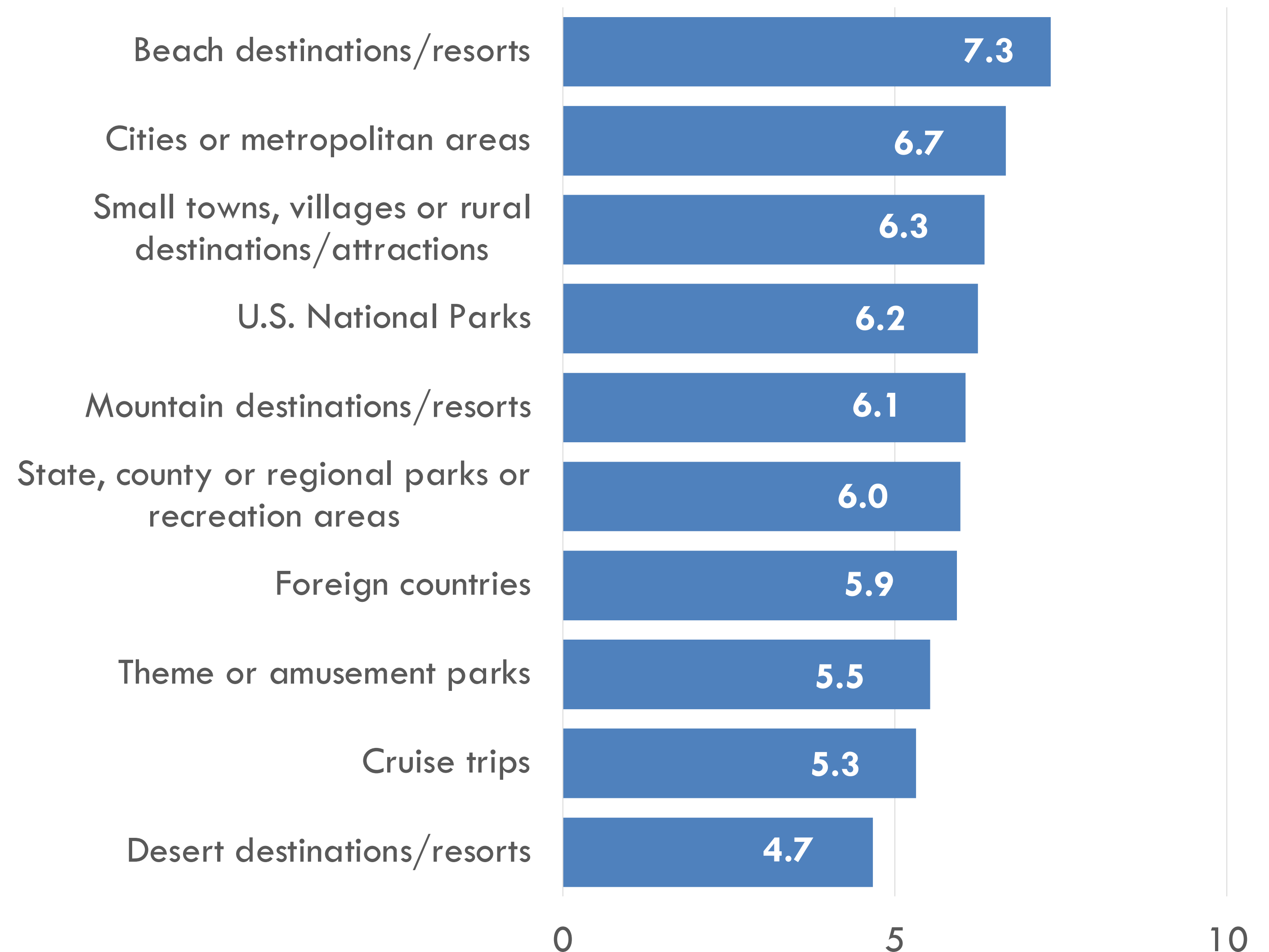


Question:

Thinking carefully about
**THE NEXT TWELVE (12)
MONTHS.**

Use the 10-point scale
where 10 = "Very
excited" and 1 = "Not at
all excited" to state how
generally excited you are
to visit each in the
upcoming year?

Mean 10-point Scale

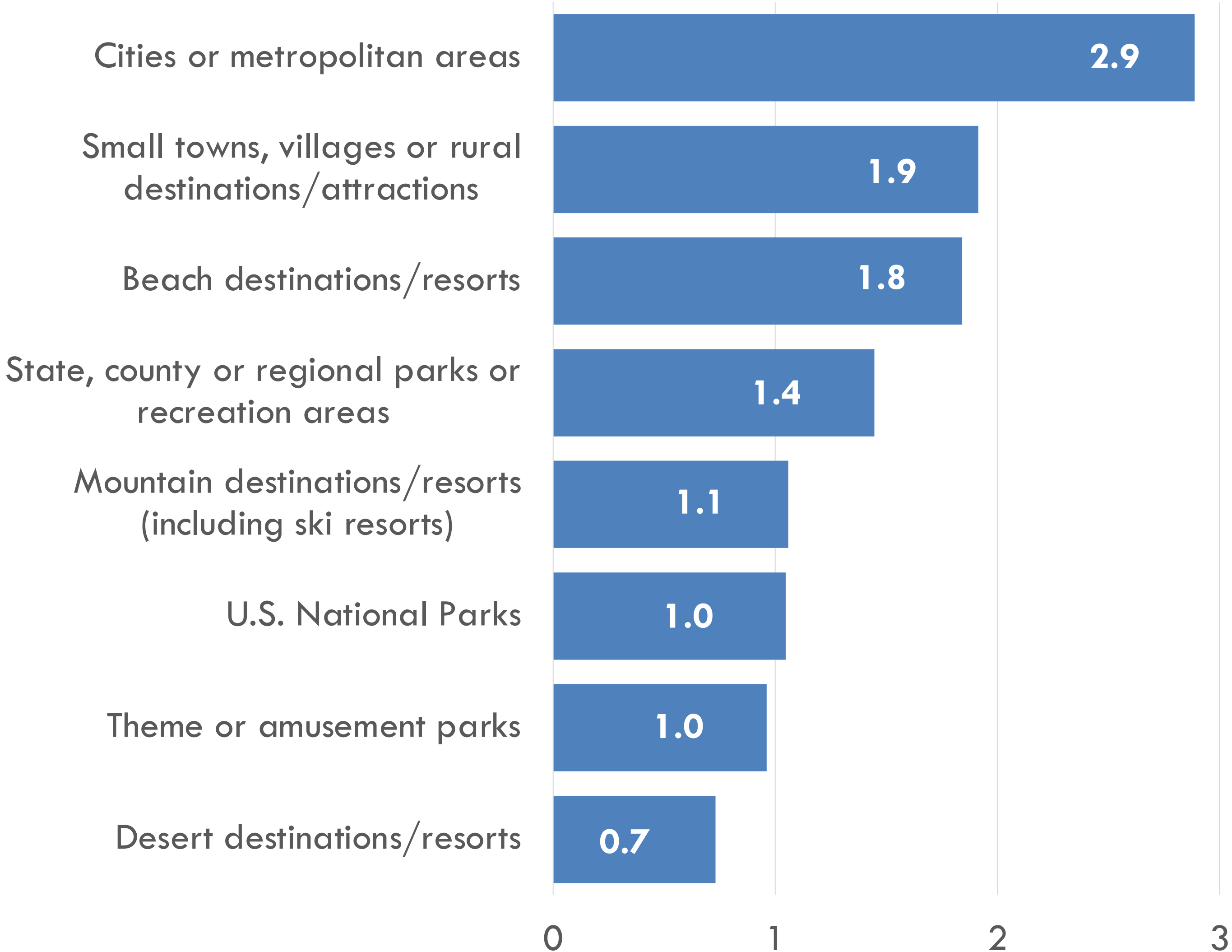


(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

Average Expected Number of Trips

Question:

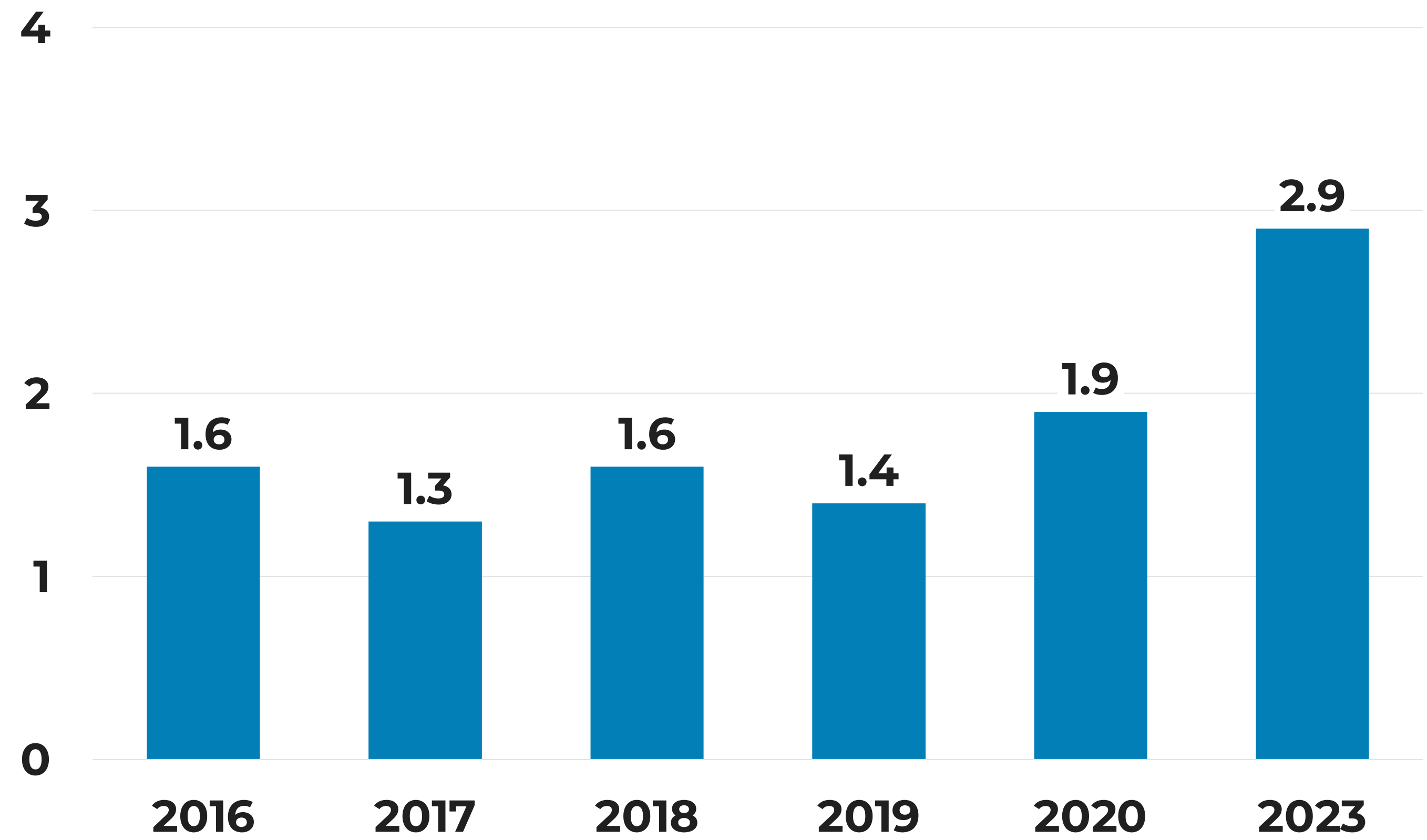
In the next twelve (12) months, HOW MANY OF YOUR LEISURE TRIPS will likely include the following types of leisure destinations?



(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

CITIES OR METROPOLITAN A

Average Expected Number of Trips



**Before pandemic*

Question:

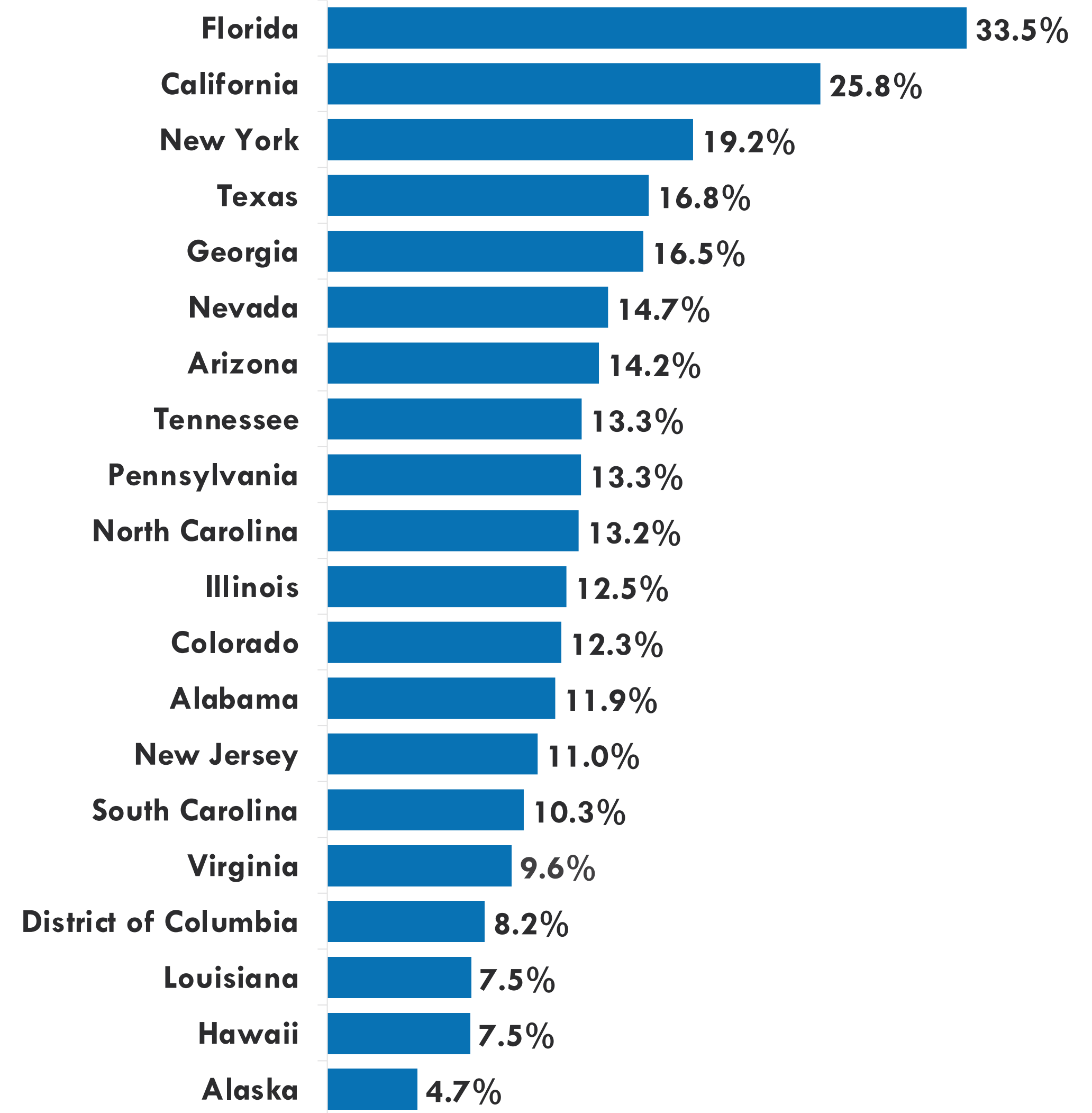
In the next twelve (12) months, HOW MANY OF YOUR LEISURE TRIPS will likely include the following types of leisure destinations?

(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

Domestic Destinations



Most Visited States (Past 2 Years)



(Base: All respondents with a bucket list, 1,963 completed surveys. Data collected February 15-22, 2023.)

Question:

Which of these states have you visited (or traveled within) in the PAST TWO (2) YEARS

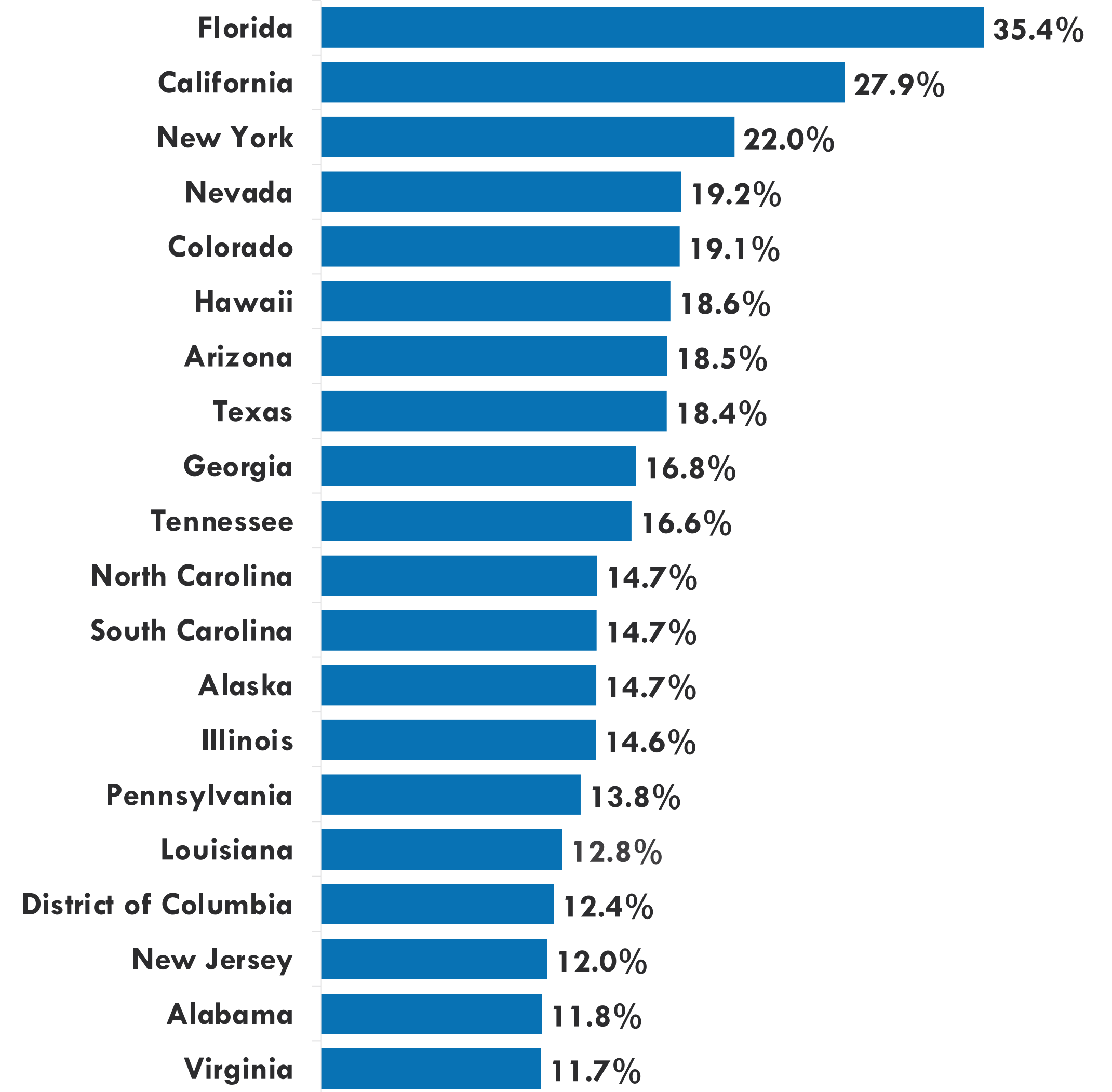
(Write in up to five)

States Most Likely to Visit (Next 2 Years)

Question:

Which of these states have you visited (or traveled within) in the PAST TWO (2) YEARS

(Write in up to five)

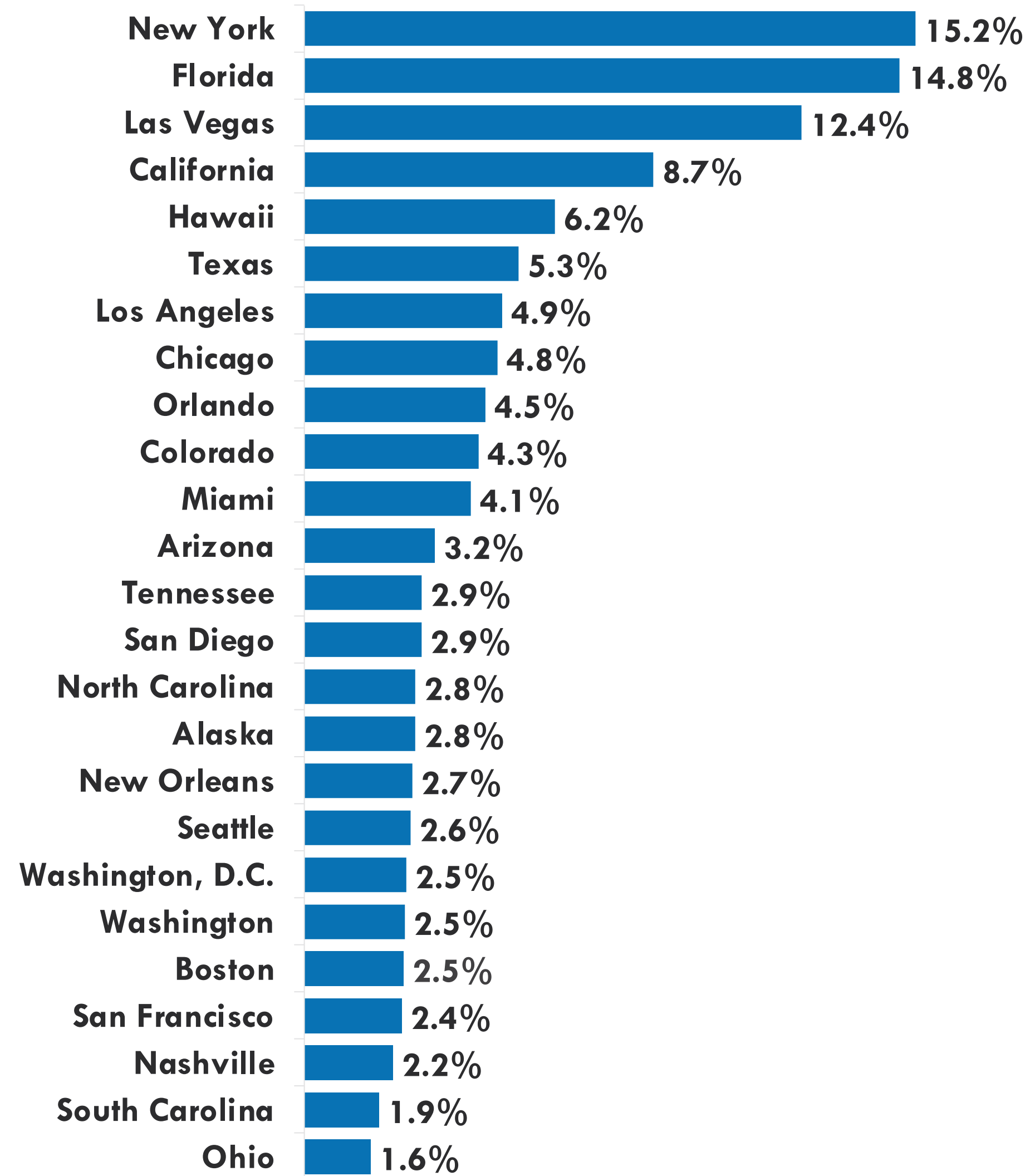


Top 20: Destination Hotlist

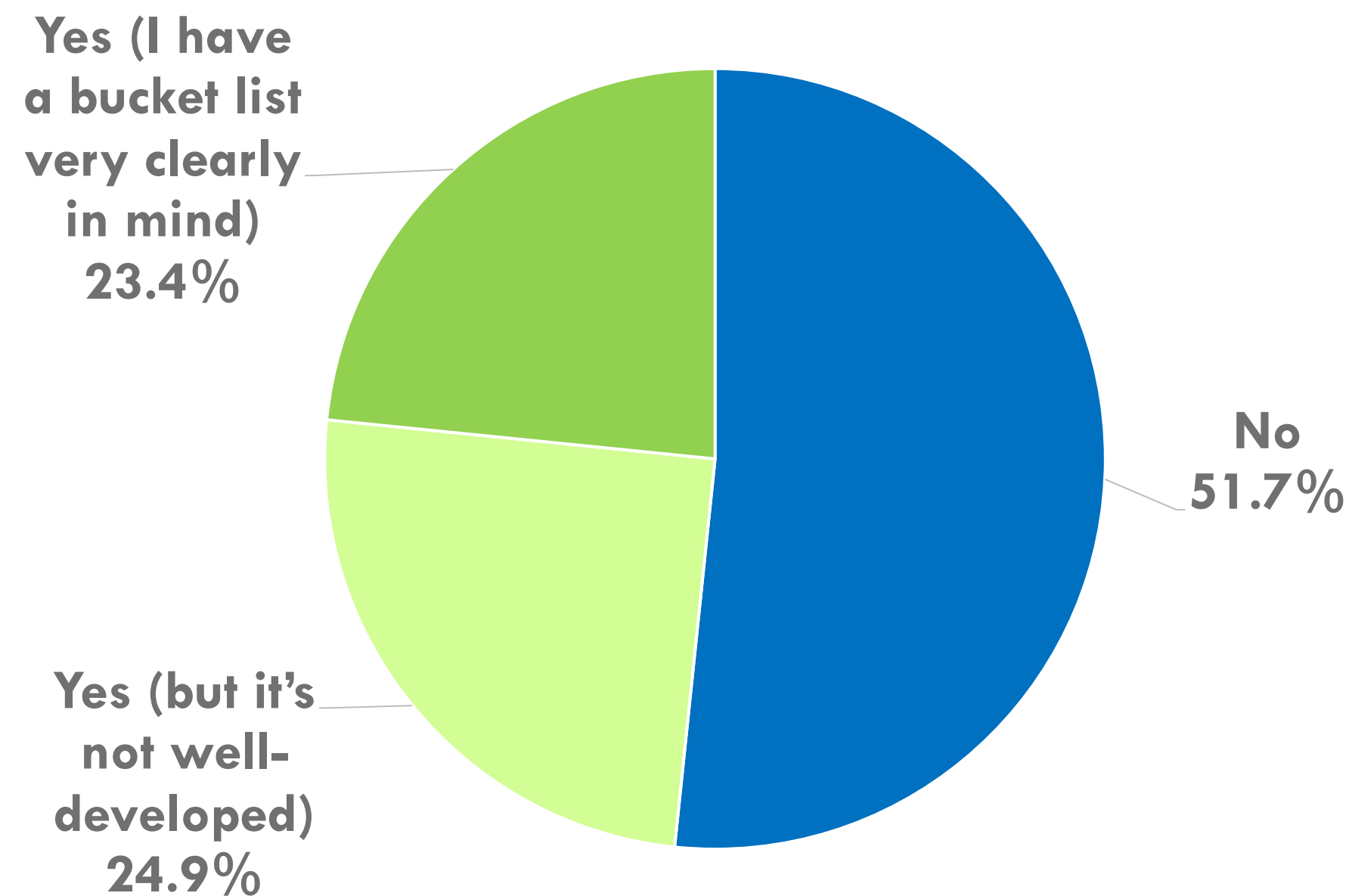
Question:

Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS?

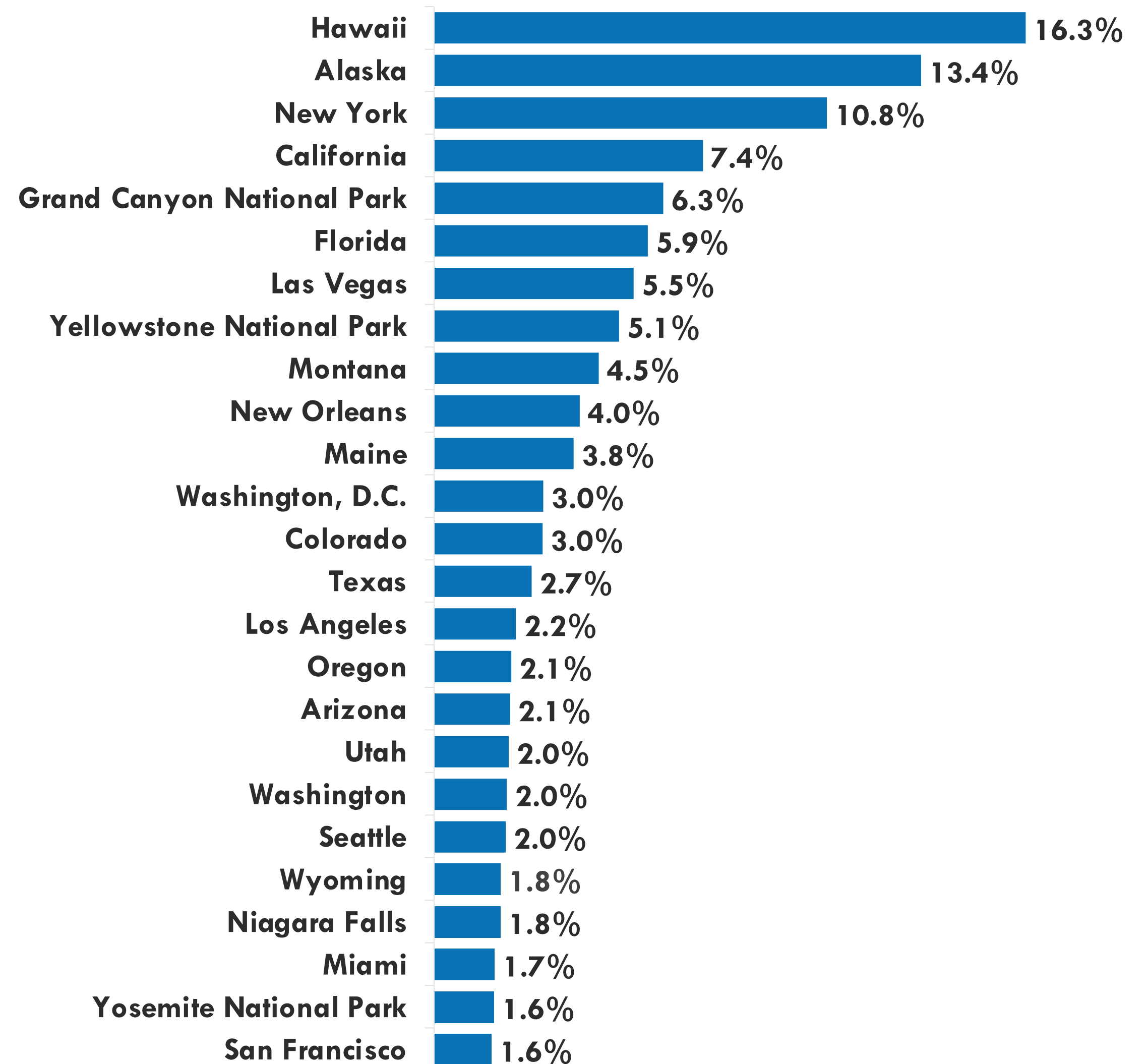
(Write in up to five)



Question: Do you have a “bucket list” of travel destinations you want to visit before, well, you know what?



Top 20 Domestic Bucket List Destinations





**DESTINATIONS
GETTING TOP
RATINGS**





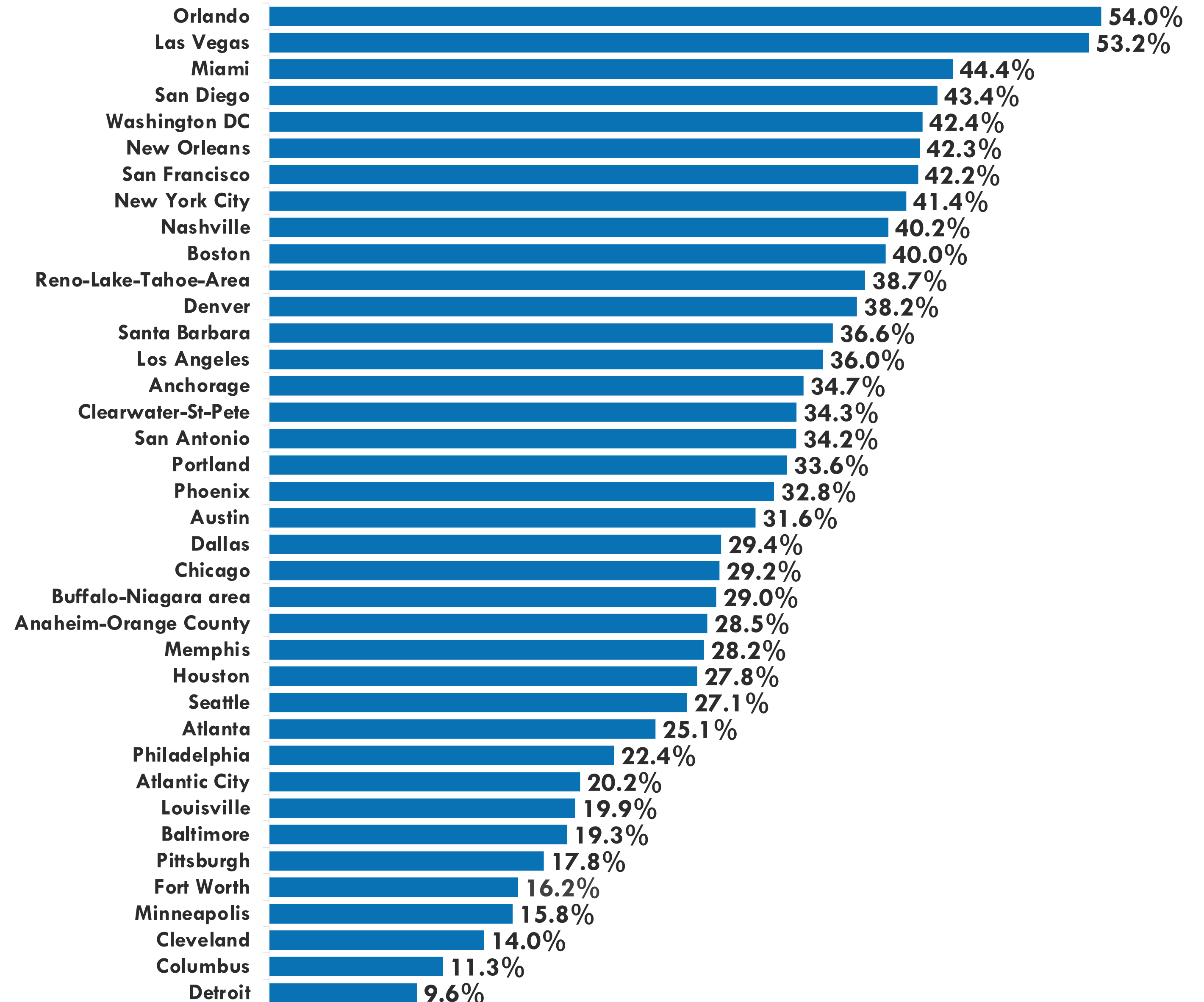
Most Appealing for Leisure

LEISURE APPEAL

Question:

In your opinion, how appealing is _____ as a place to visit for leisure travel? (Select one)

% Appealing or Extremely Appealing

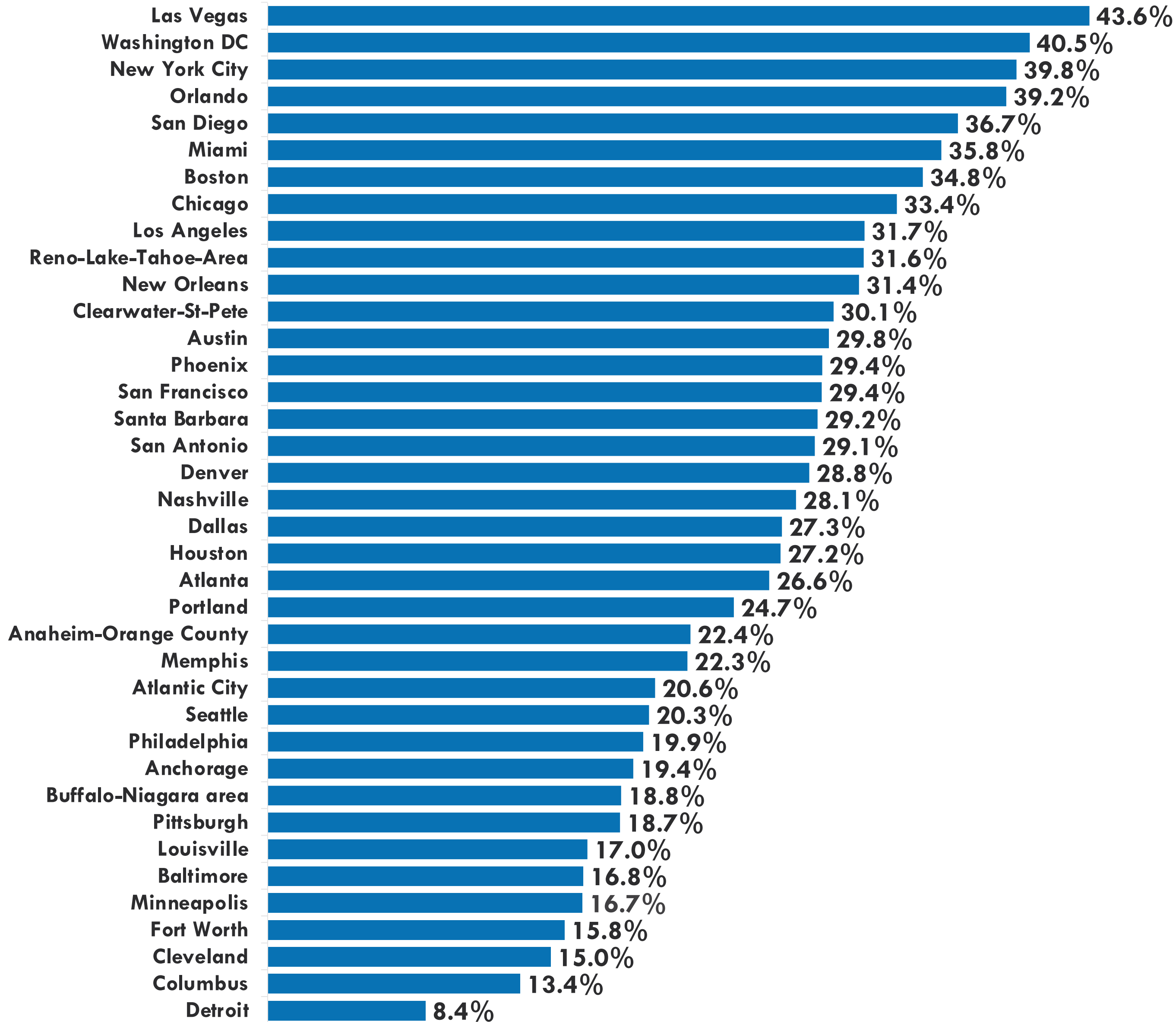




Most Appealing to Attend a Meeting or Convention

% Appealing or Extremely Appealing

MEETINGS APPEAL



Question:

How appealing would you find _____ to be as a place to visit for conventions, conferences or group meetings? (Select one)

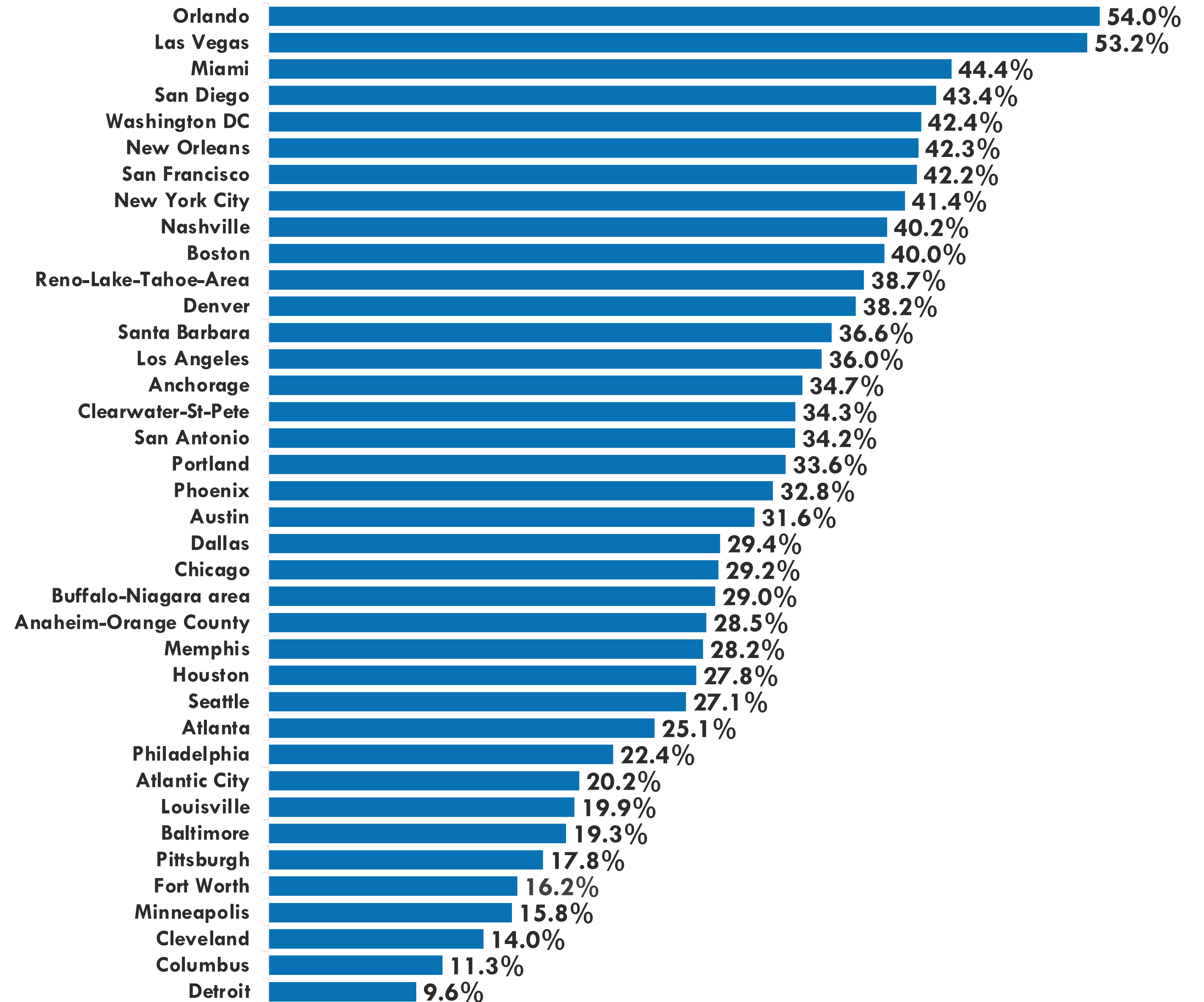
A large Ferris wheel is the central focus, set against a blue sky with scattered white clouds. The wheel's intricate metal structure and several passenger cars are visible. In the foreground, several tall palm trees with green fronds are scattered across the scene. At the bottom, a white building with large windows and a sign that reads "ICON PARK" is visible. The overall scene is bright and sunny, suggesting a tropical or coastal location.

Destination Familiarity

Question:

How familiar are you with the things for visitors to see and do in _____?
(Select one)

% Familiar or Extremely Familiar





Destination Attributes



FOOD

(% Rating as Good or Extremely Good)

- New York (69.6%)
- Las Vegas (66.1%)
- San Francisco (63.2%)
- New Orleans (63.1%)

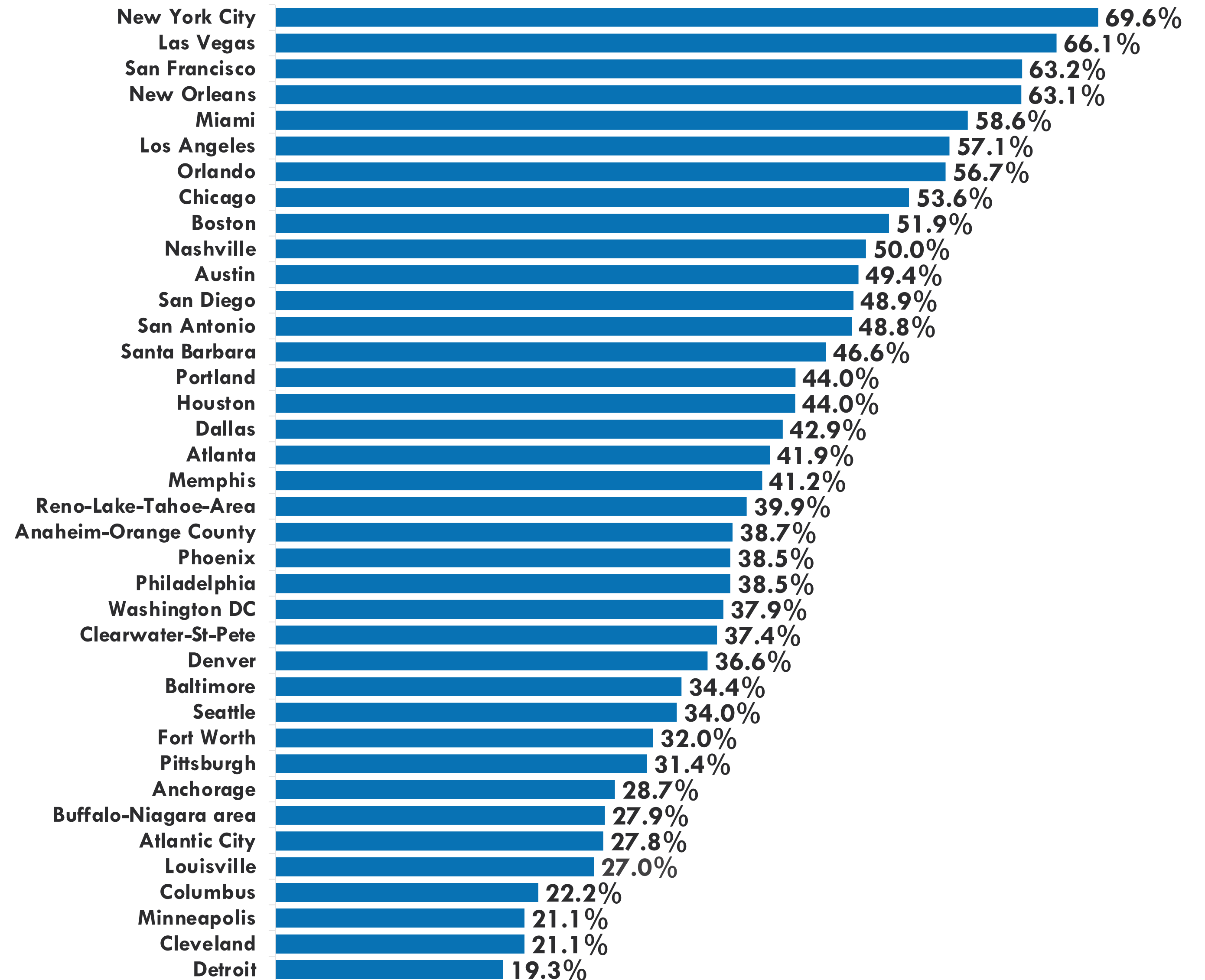


FOOD & CUISINE

Question:

Given what you currently know about _____, please rate the destination for each of these attributes.

(% Good or Extremely Good)



SAFETY

(% Rating as Good or Extremely Good)

Orlando (35.4%)

San Diego (35.0%)

Reno-Lake Tahoe Area (34.5%)

Anchorage (34.2%)

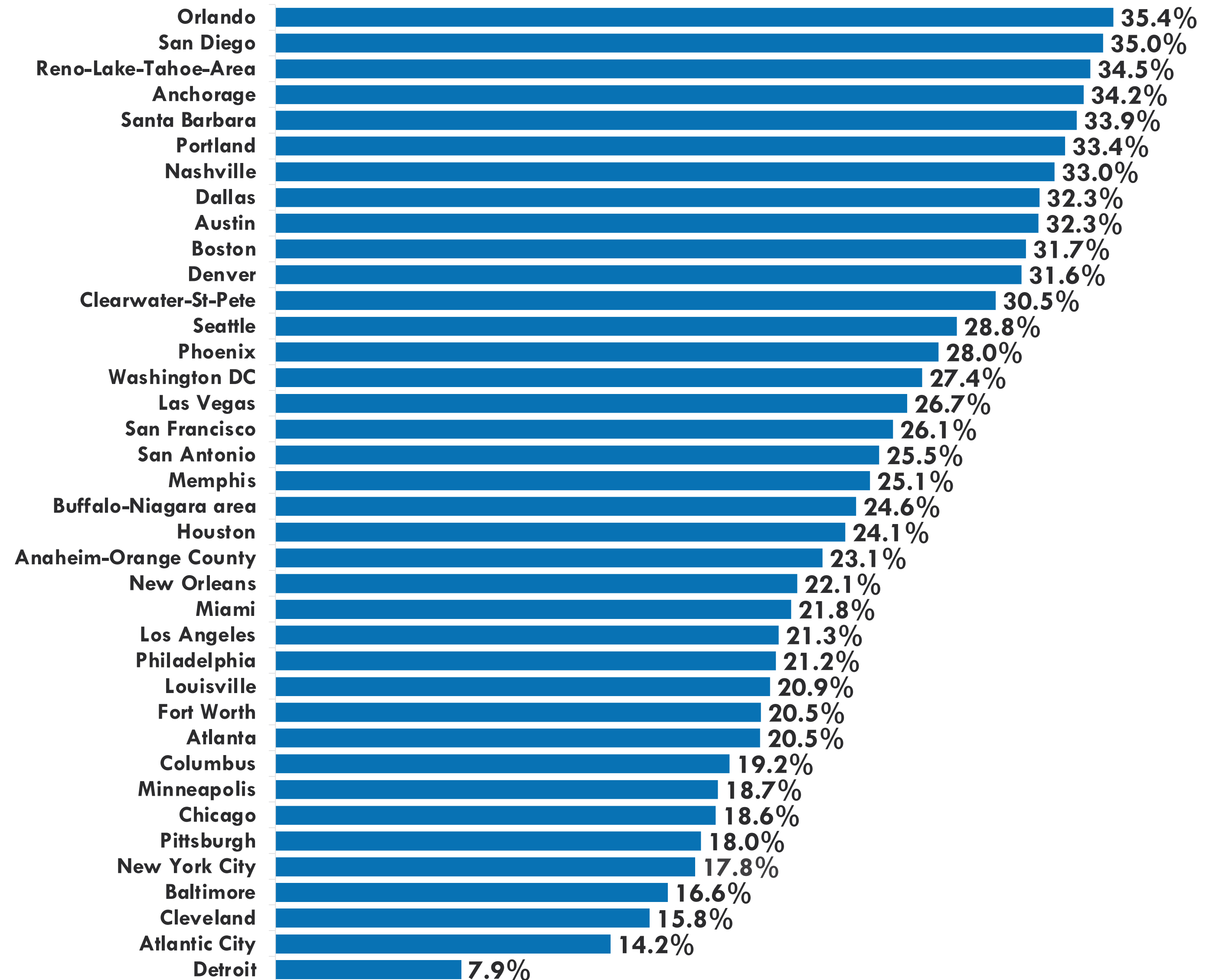


SAFETY

Question:

Given what you currently know about _____, please rate the destination for each of these attributes.

(% Good or Extremely Good)



ROMANTIC ATMOSPHERE

(% Rating as Good or Extremely Good)

- Miami (36.7%)
- Reno-Lake Tahoe area (33.2%)
- Santa Barbara (33.0%)
- Las Vegas (32.1%)

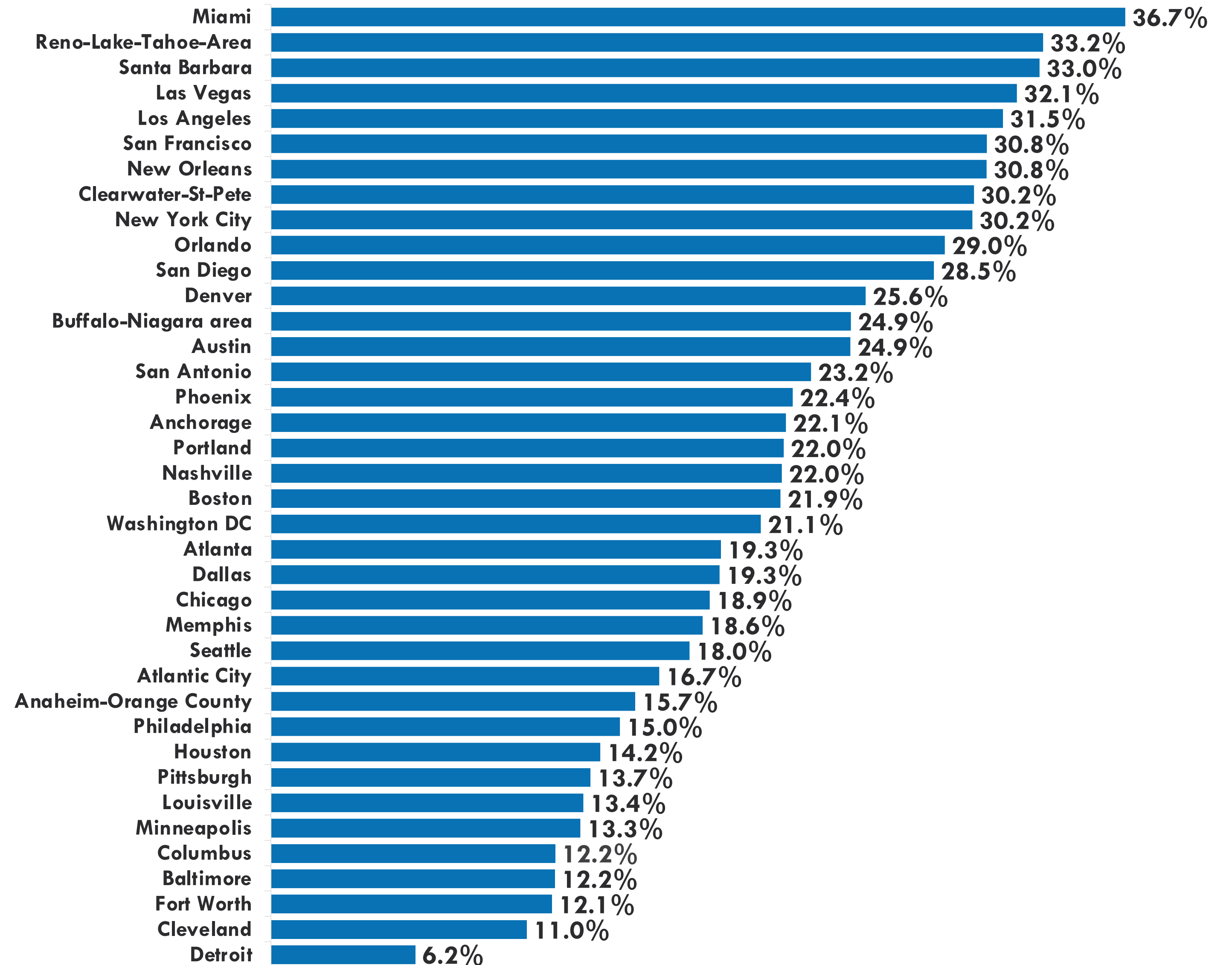


ROMANTIC ATMOSPHERE

Question:

Given what you currently
know about _____,
please rate the
destination for each of
these attributes.

(% Good or Extremely Good)



Welcoming to People Like Myself

- Orlando (53.8%)
- Las Vegas (50.3%)
- Nashville (46.3%)
- New Orleans (43.5%)

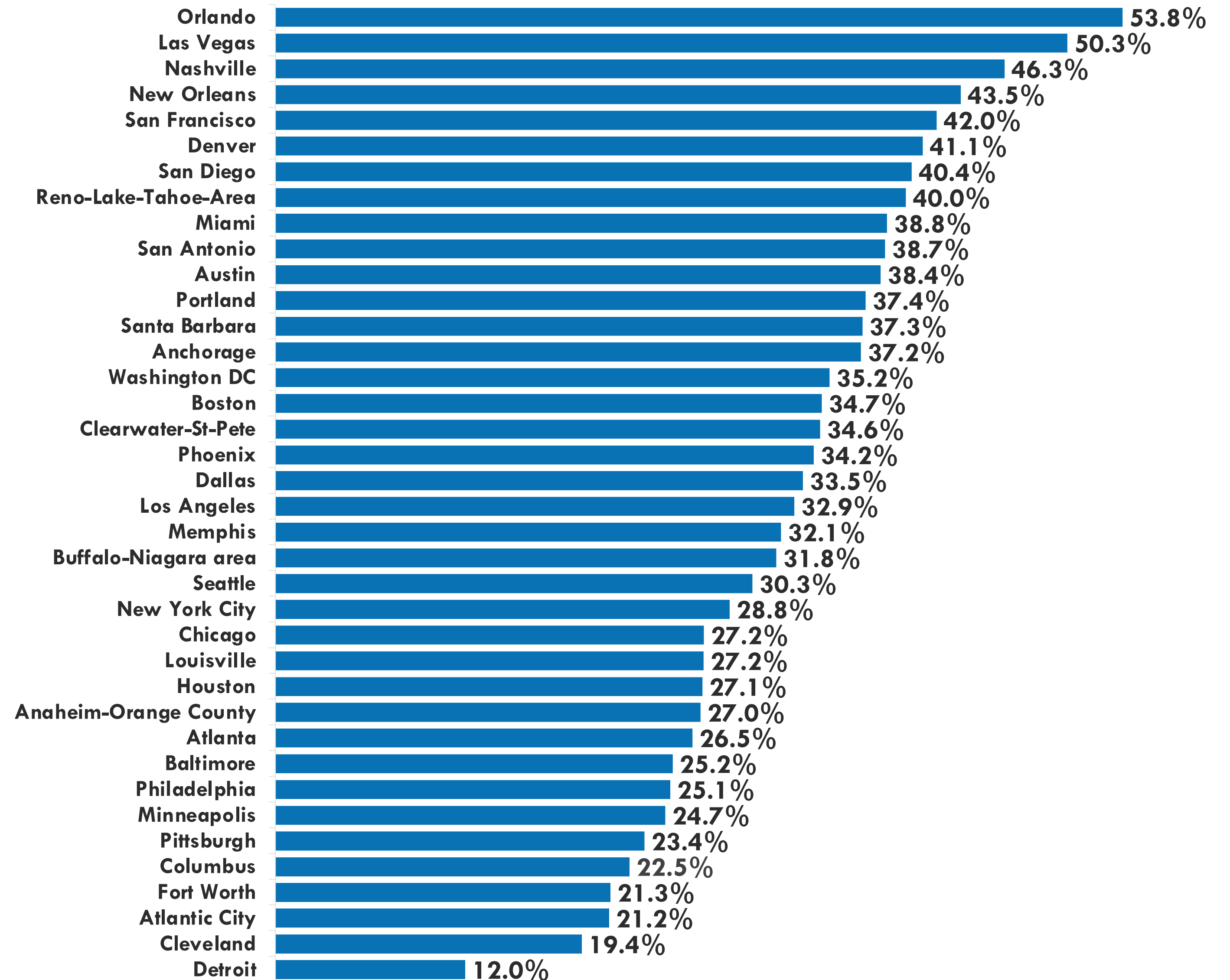


WELCOMING TO PEOPLE LIKE YOURSELF

Question:

Given what you currently
know about _____,
please rate the
destination for each of
these attributes.

(% Good or Extremely Good)



Increasing in Popularity

% Rating as More Popular or Much More Popular

- Nashville (34.6%)
- Orlando (30.4%)
 - Miami (30.1%)
 - Austin (28.2%)



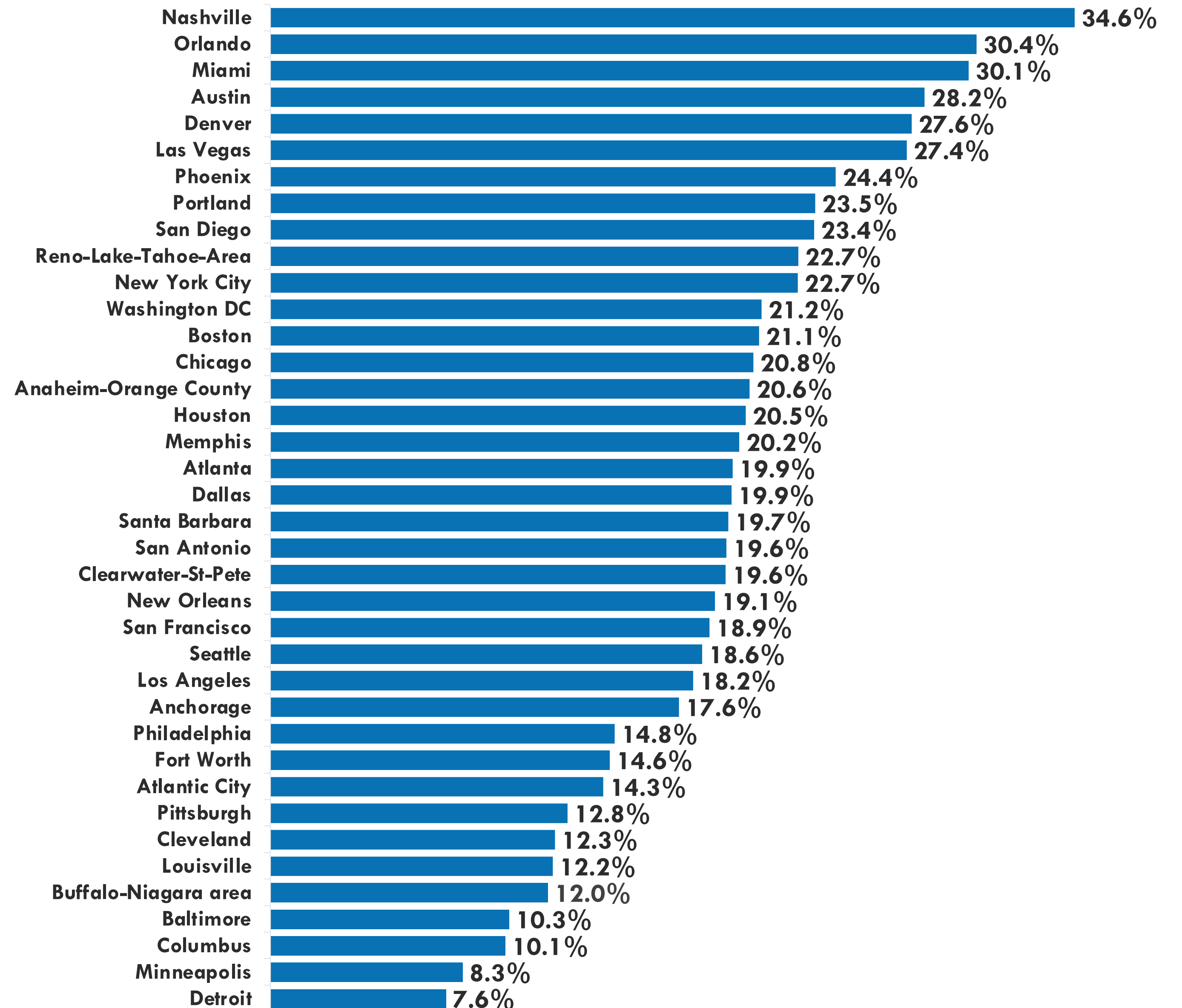
POPULARITY

Question:

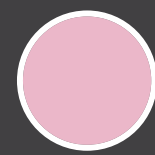
In the last few years,
has Destination's popularity
as a place to visit changed?
(Select one to complete the
sentence)

From what I have seen,
Destination is
becoming _____

% More Popular or Much More Popular



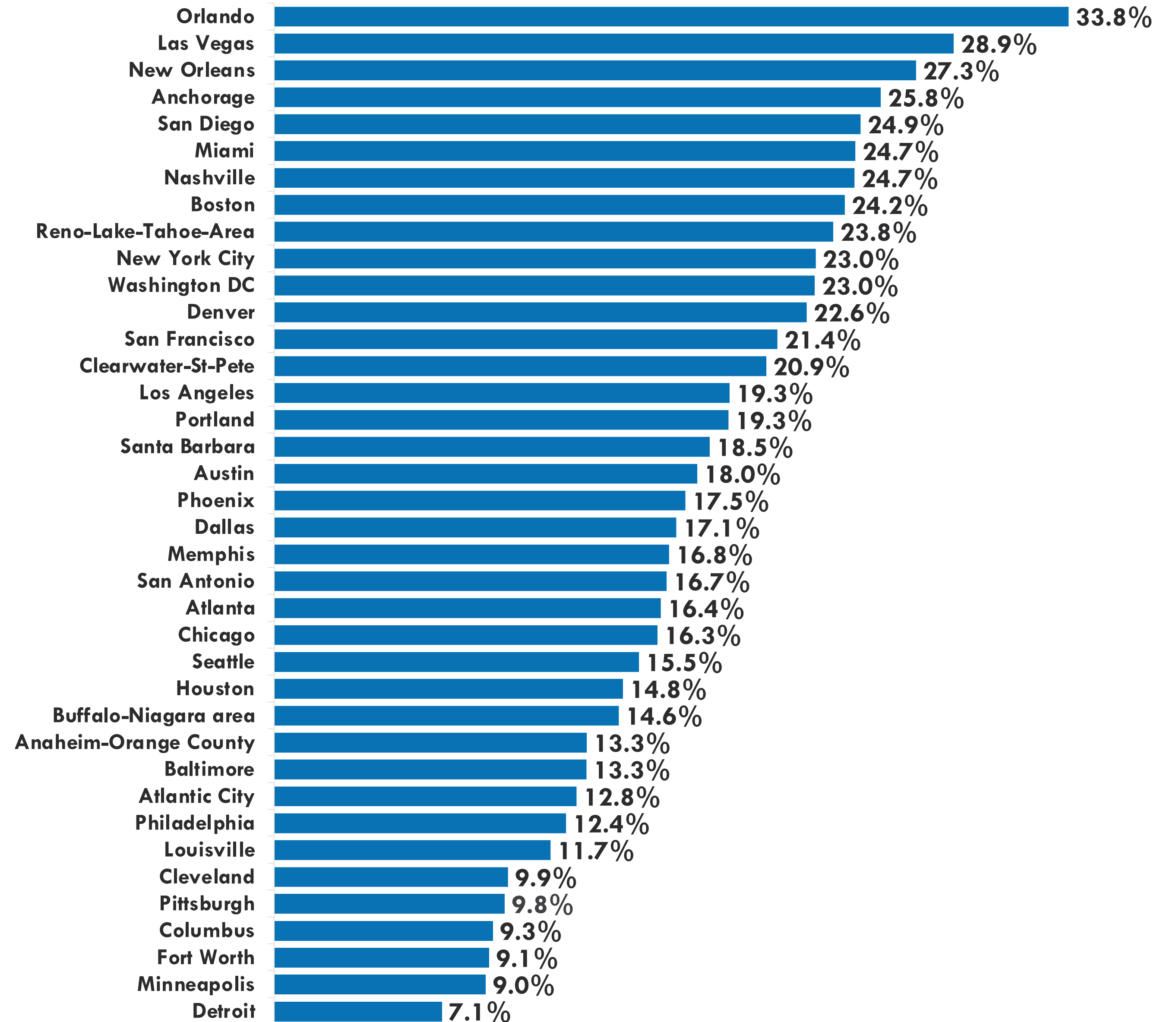
Destination Grades



Question:

Using what you already know...If you were giving _____ an overall grade as a tourist destination, what would it be?

Grade = A+, A or A-

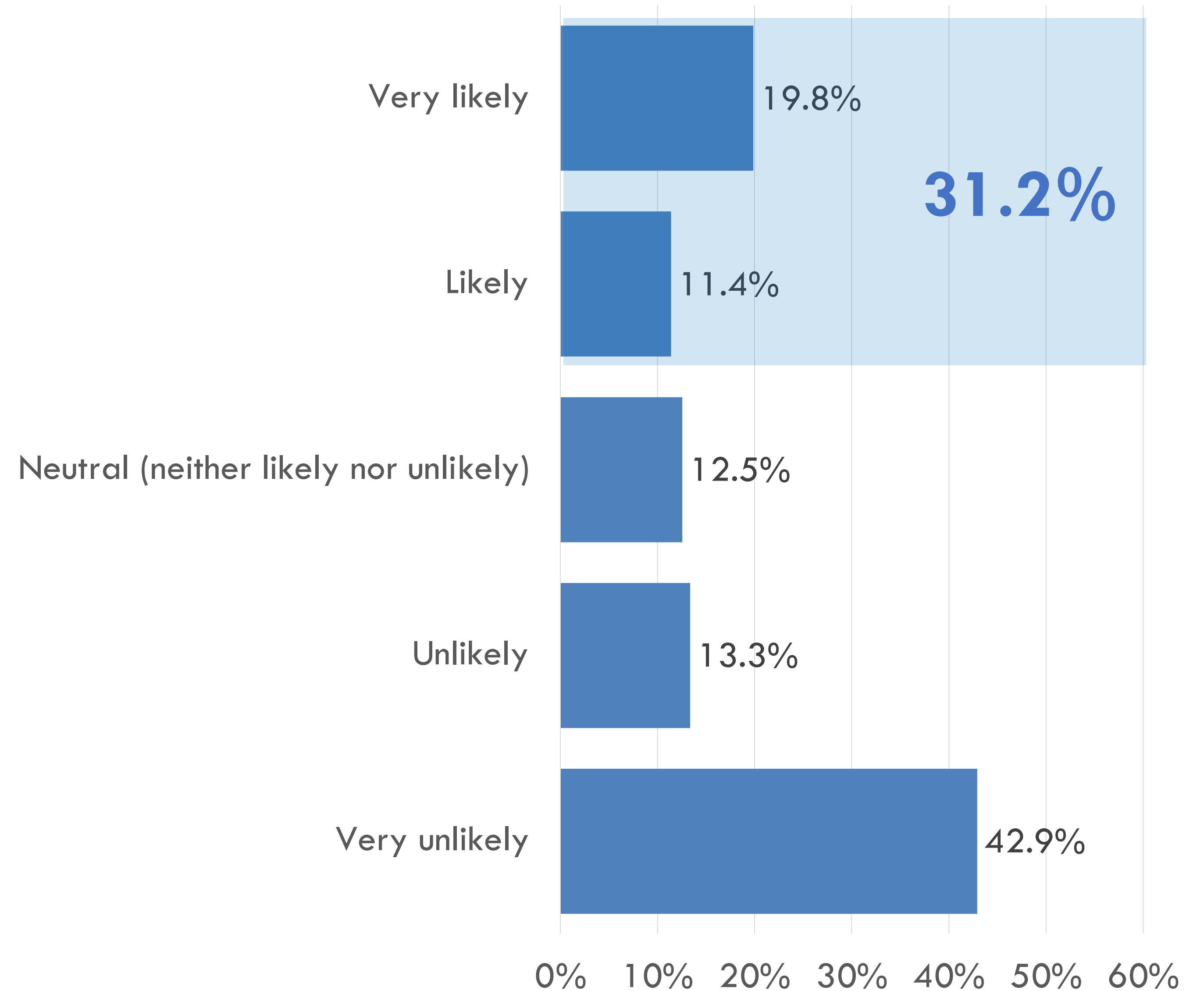


International Destinations



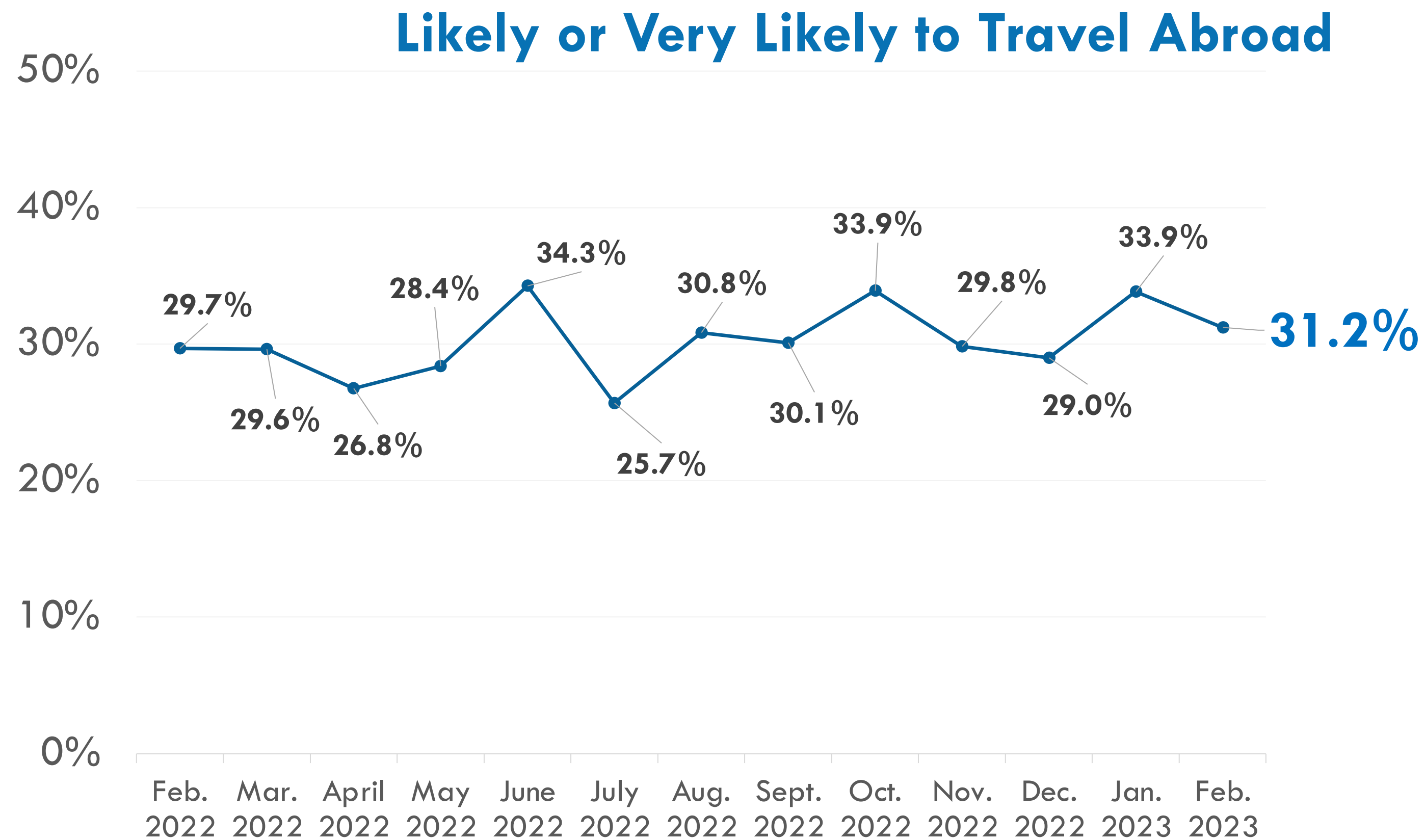
Question:

How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?



(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

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



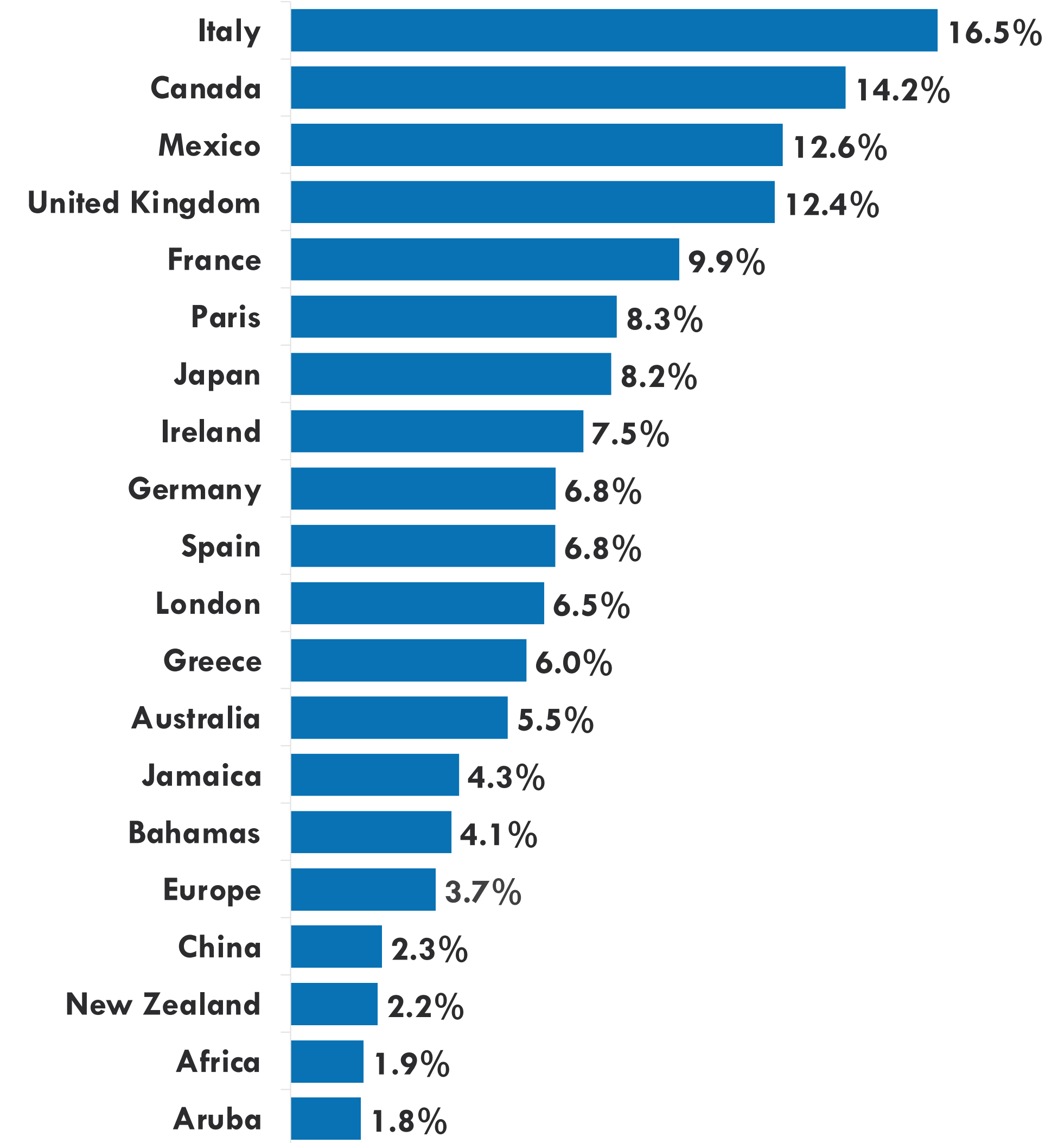
Expectations for travel outside the United States has also shown little change this year.

Top 20: Destination Hotlist

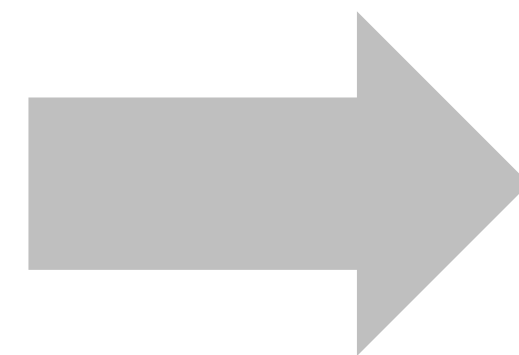
Question:

Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS?

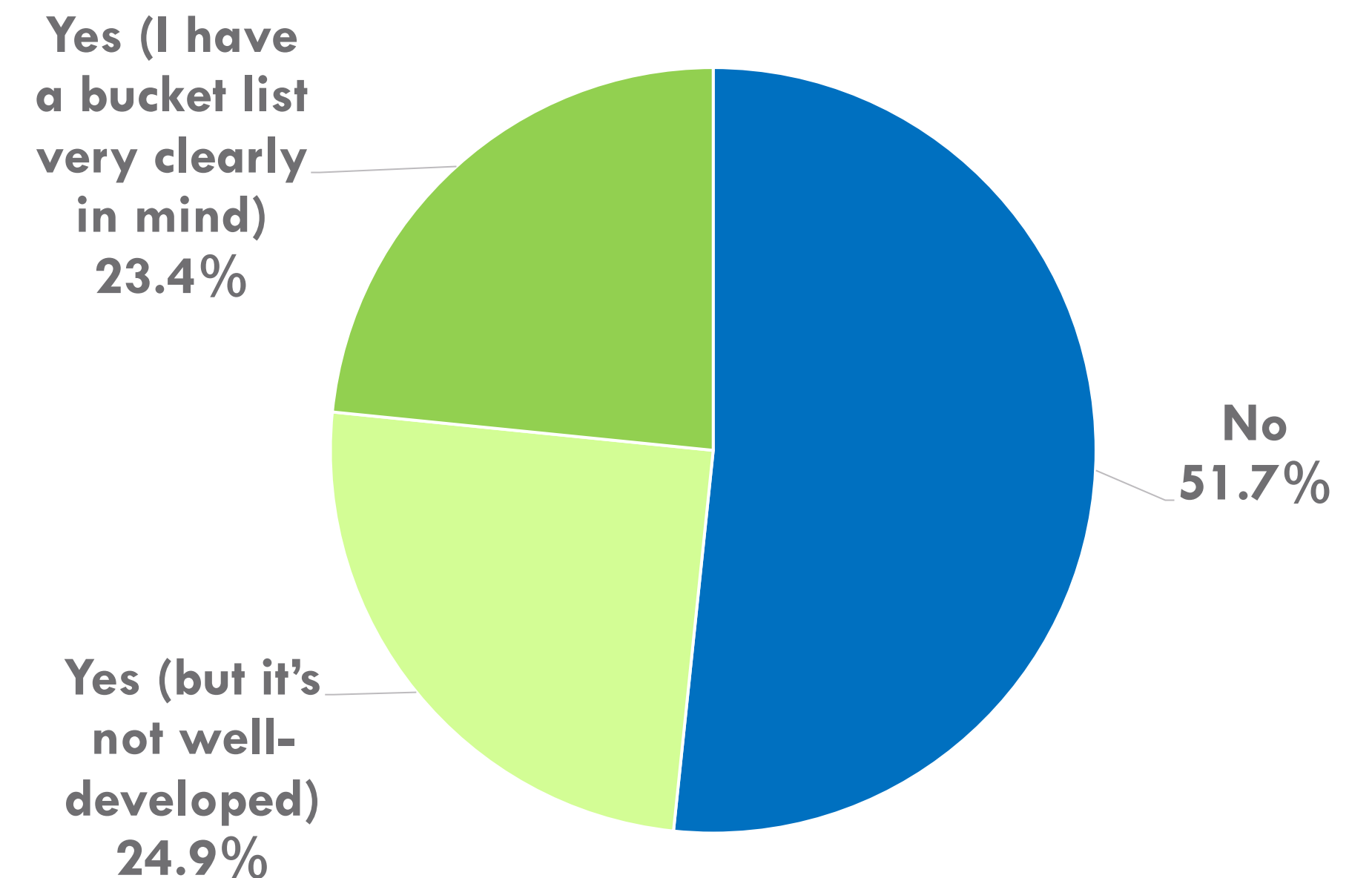
(Write in up to five)



Do you remember this chart?



Question: Do you have a “bucket list” of travel destinations you want to visit before, well, you know what?

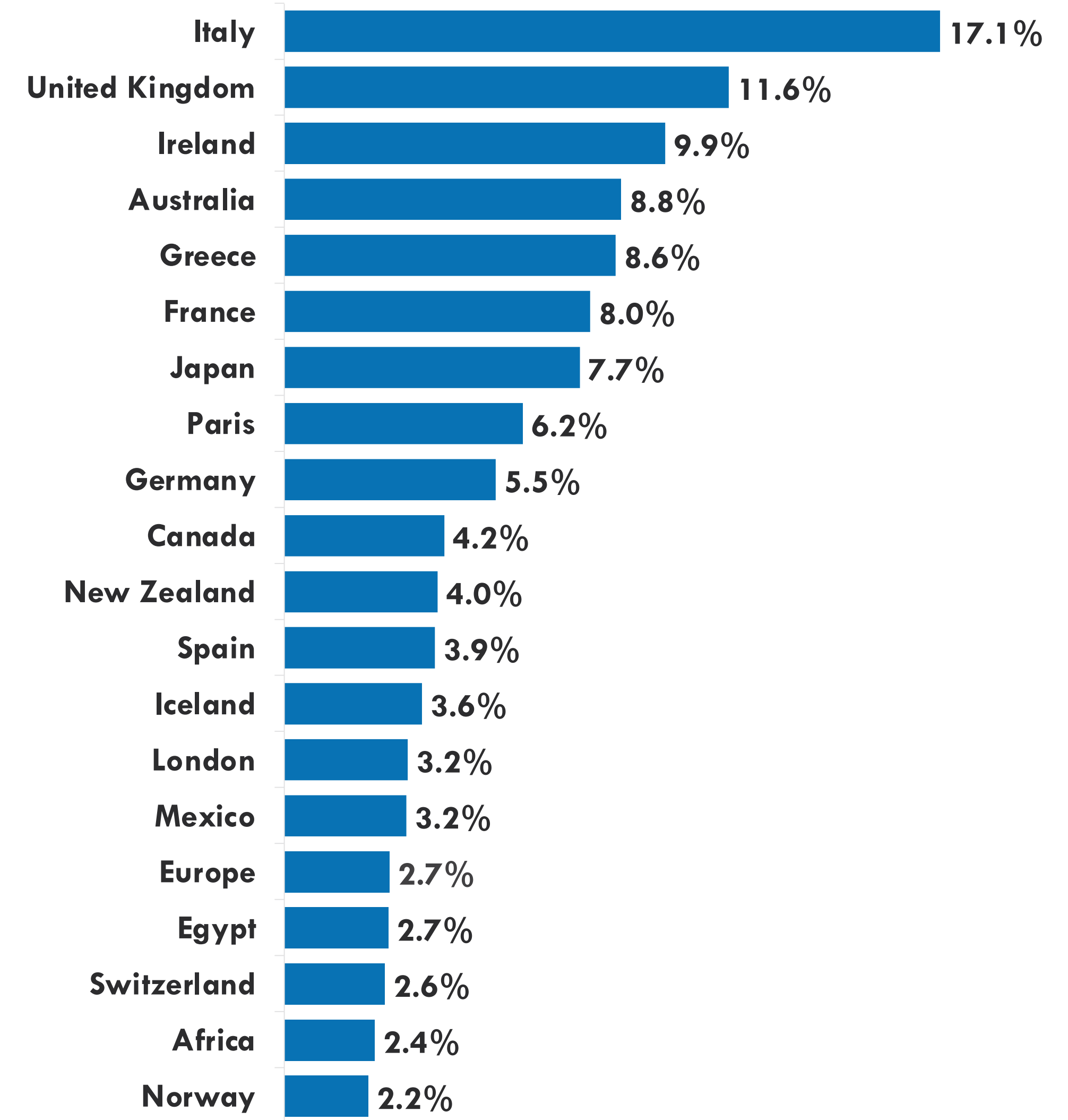


Top 20 International Bucket List Destinations

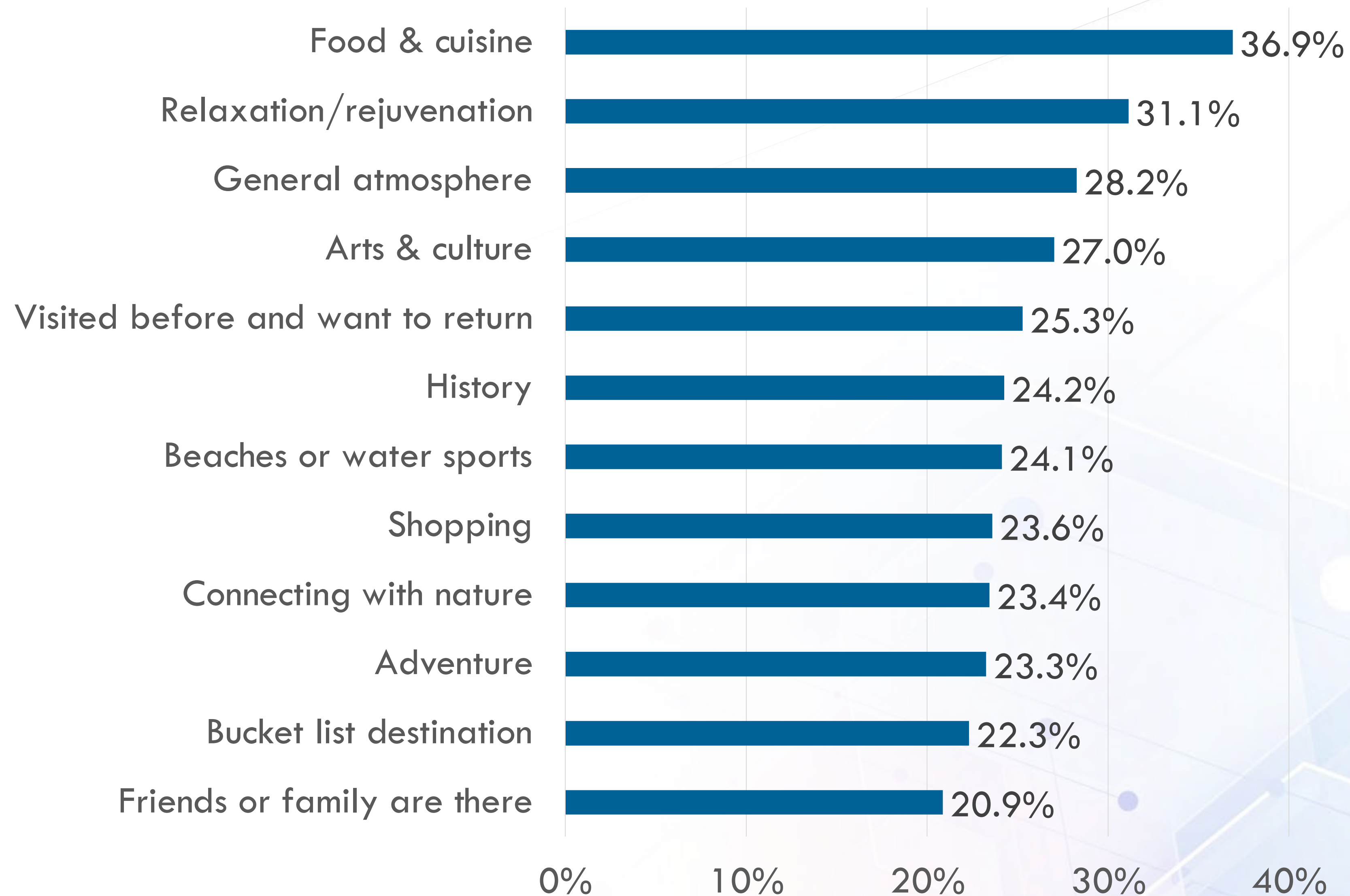
Question:

Which FOREIGN DESTINATIONS (if any) are at the top of your bucket list?

(Write in your top 2)



DRIVERS OF TRAVEL AMONG INTERNATIONALLY-ORIENTED TRAVELERS



Q. Question: You said you would like to visit in the next year. Which of the following are reasons you want to visit in the next year? (Select all that apply)



Travel Planning

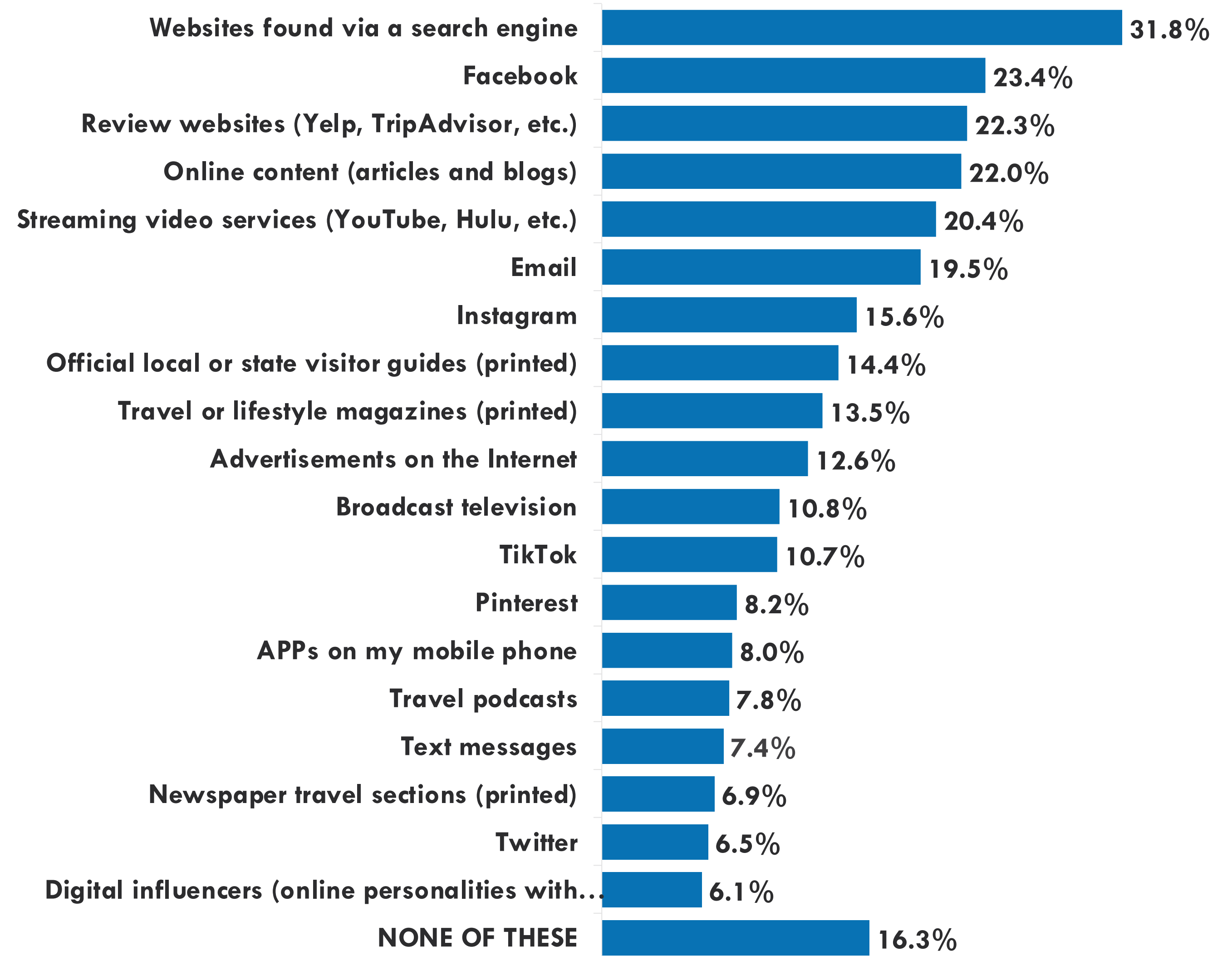


Question:

Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit?

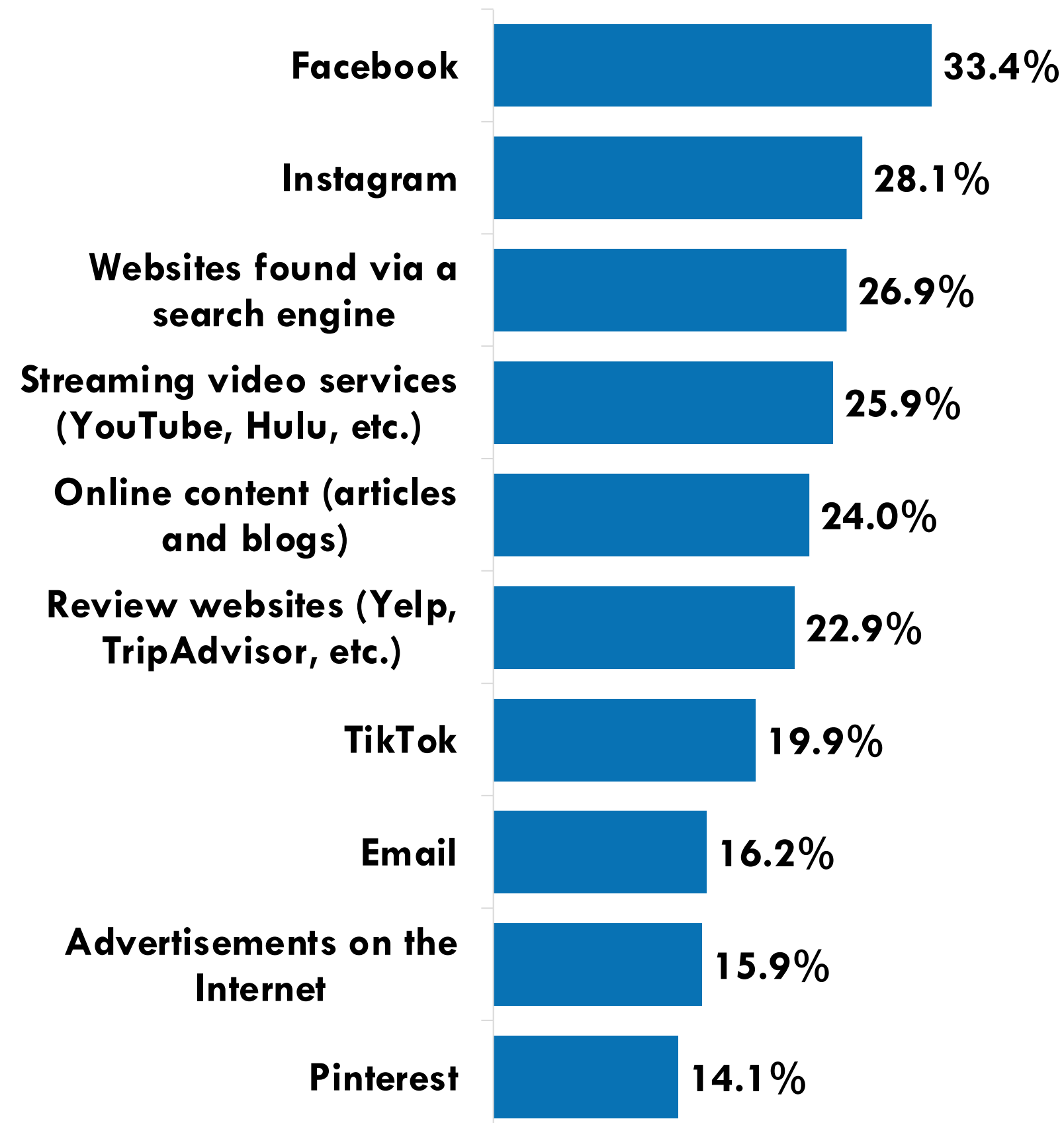
Receptivity: Travel Planning Resources



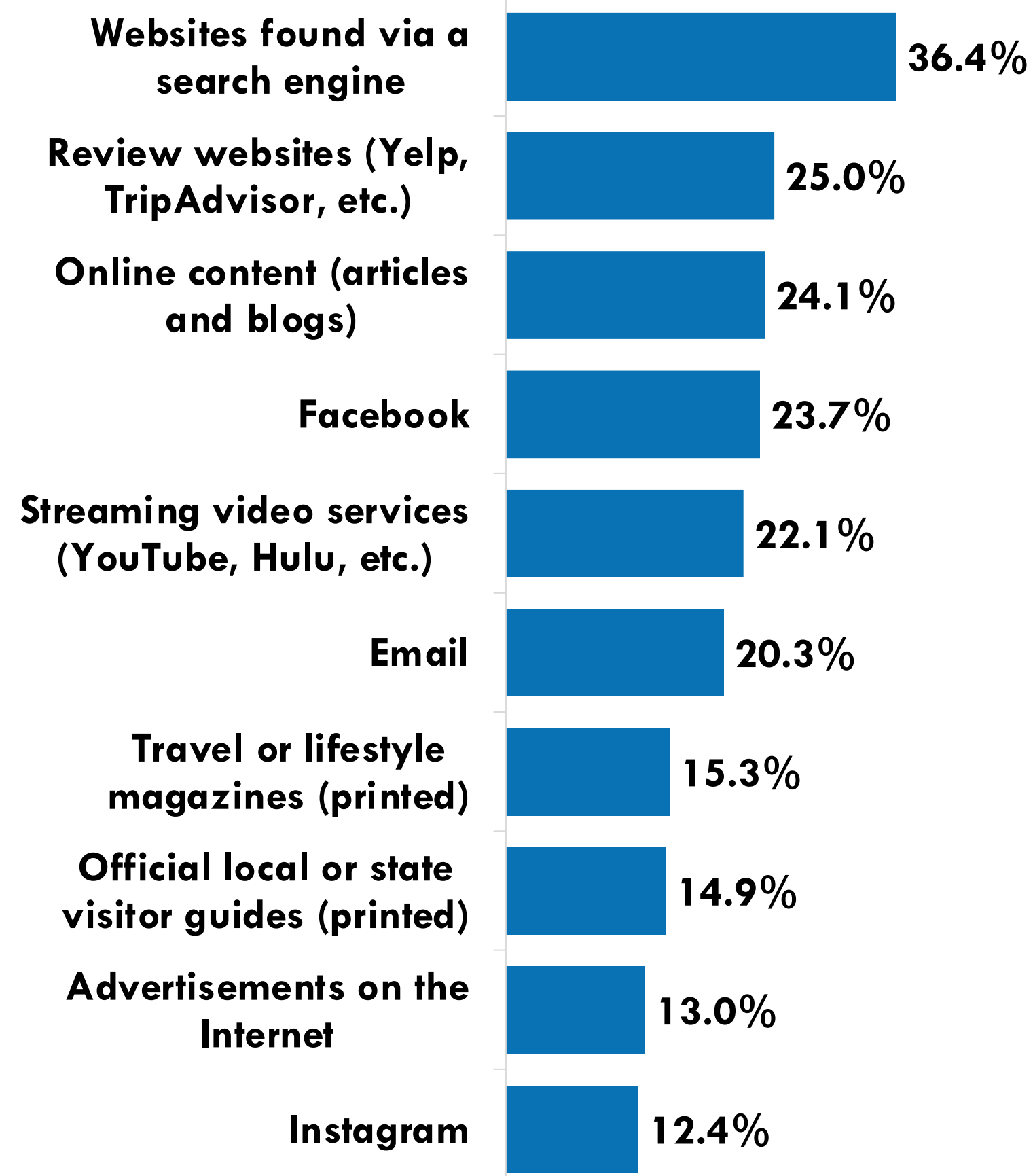
(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

Receptivity: Top Travel Planning Resources

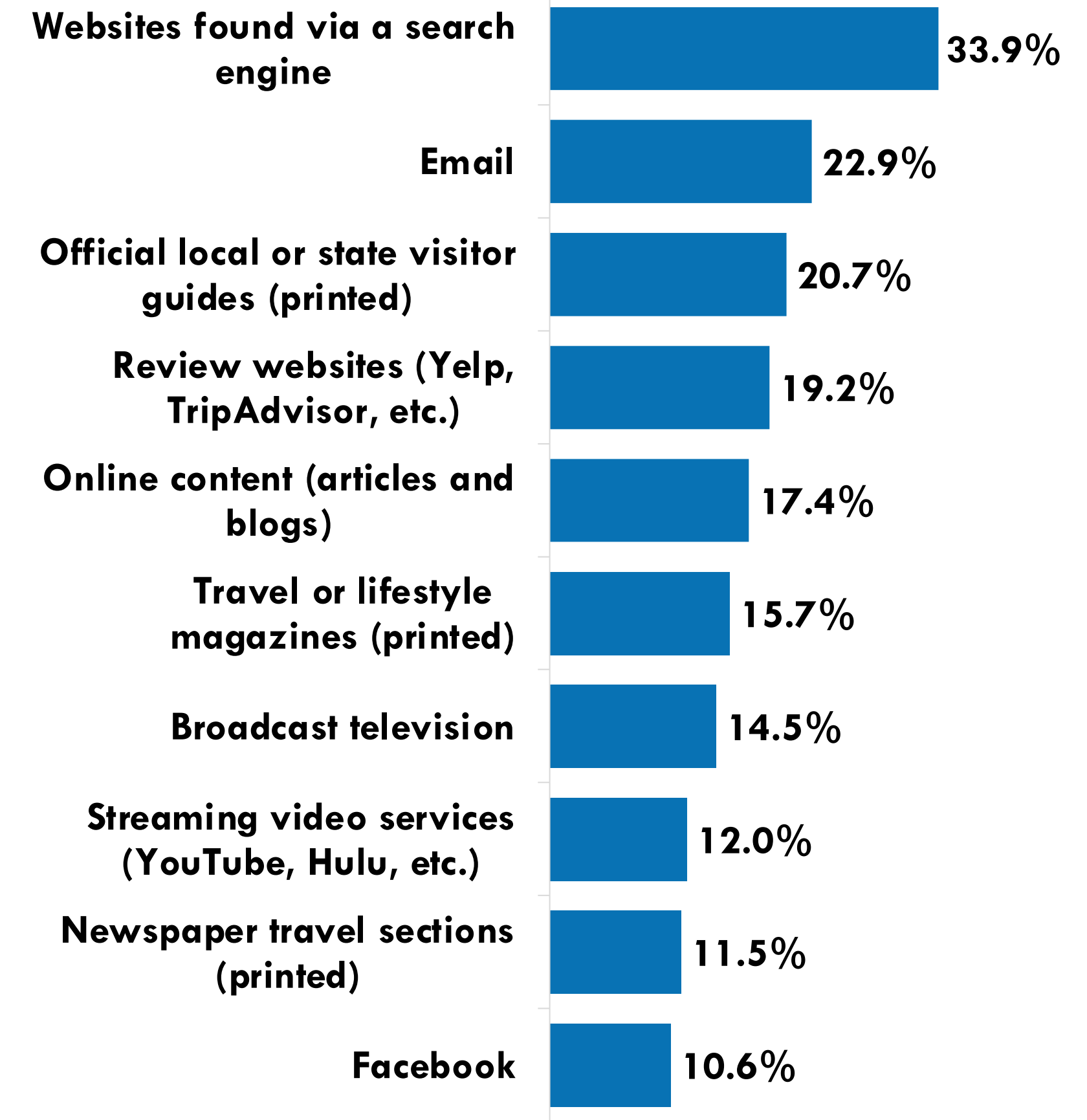
Millennial or Younger



Generation X

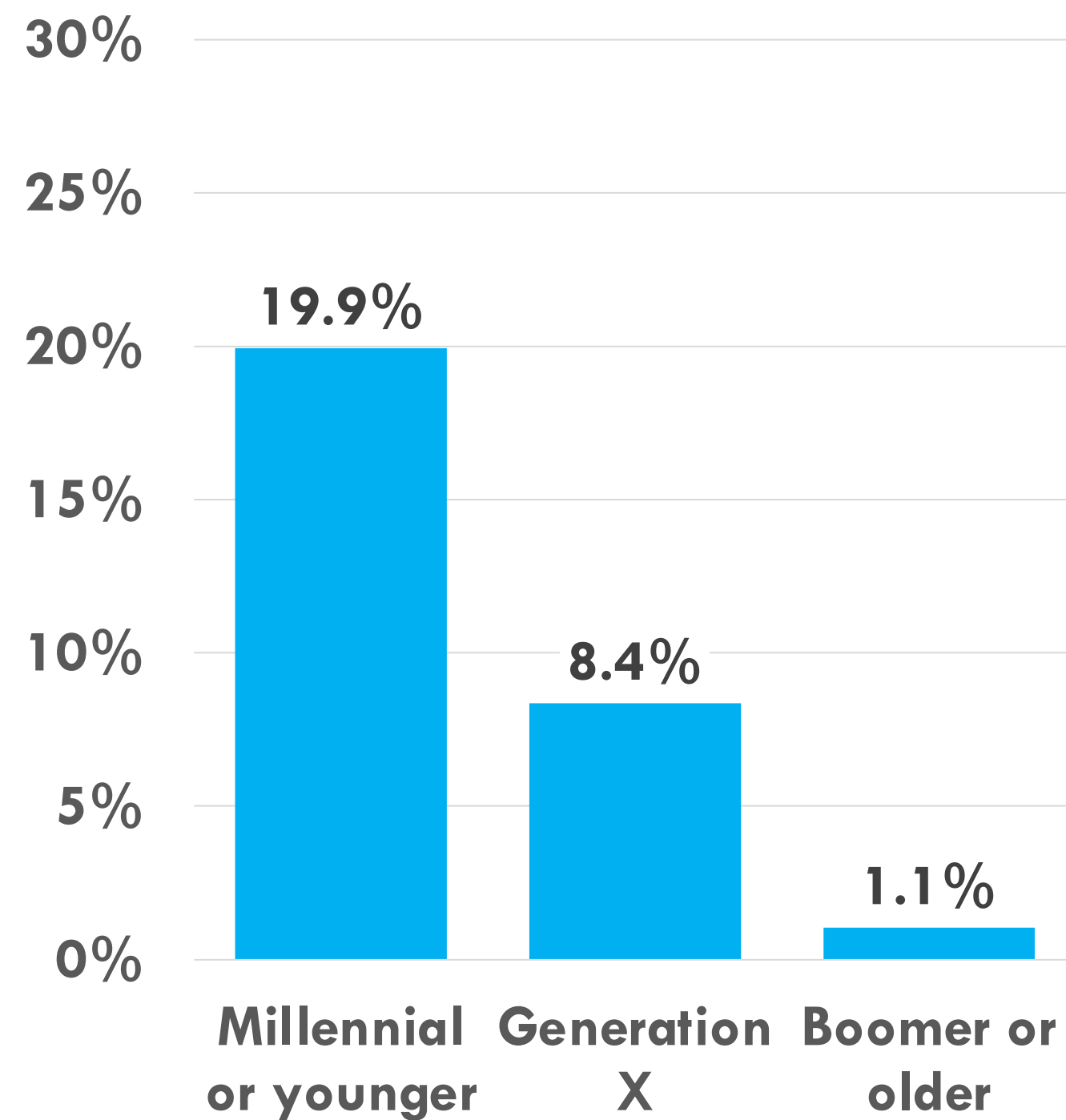


Boomer or Older

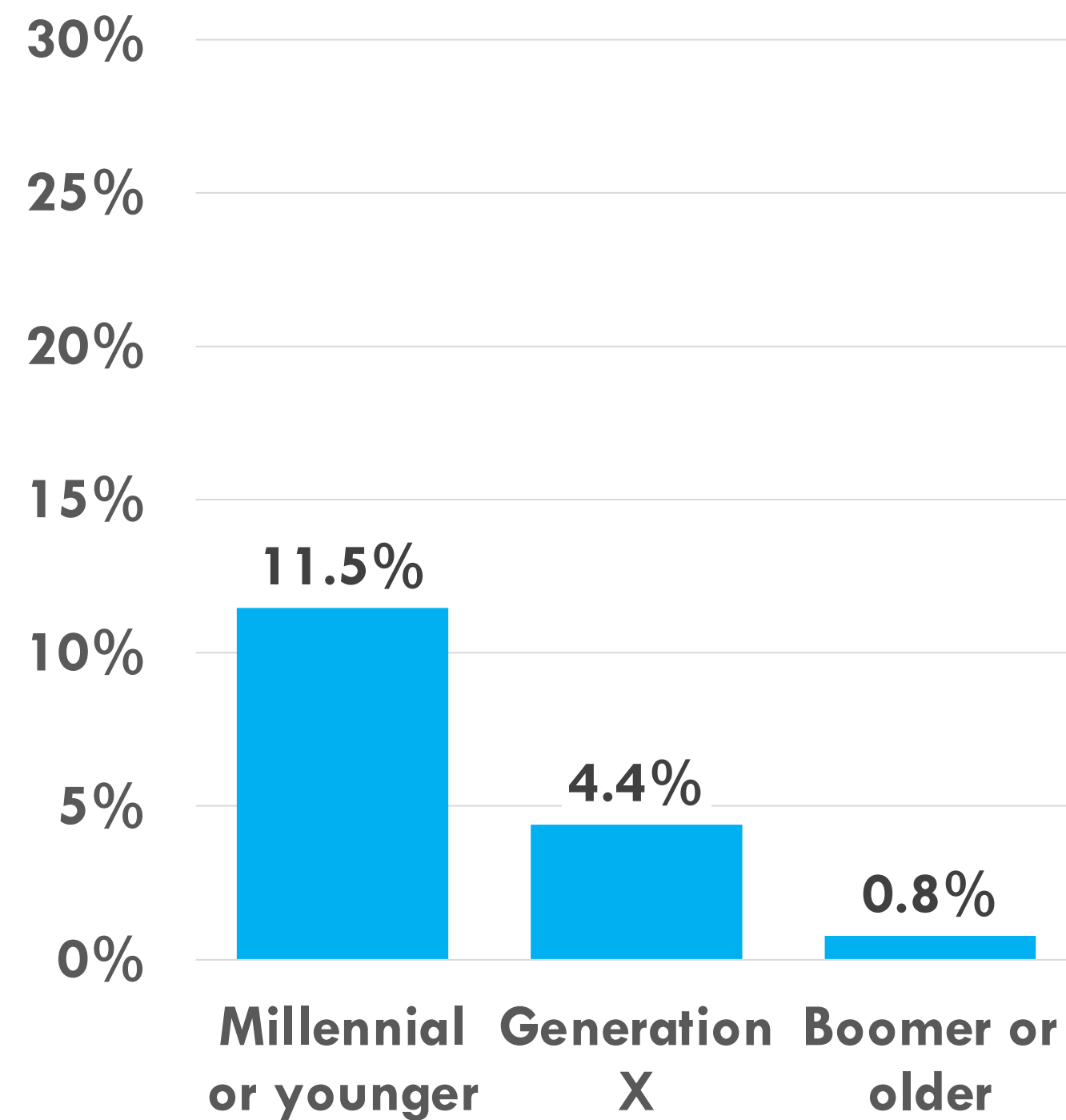


Receptivity: Top Travel Planning Resources

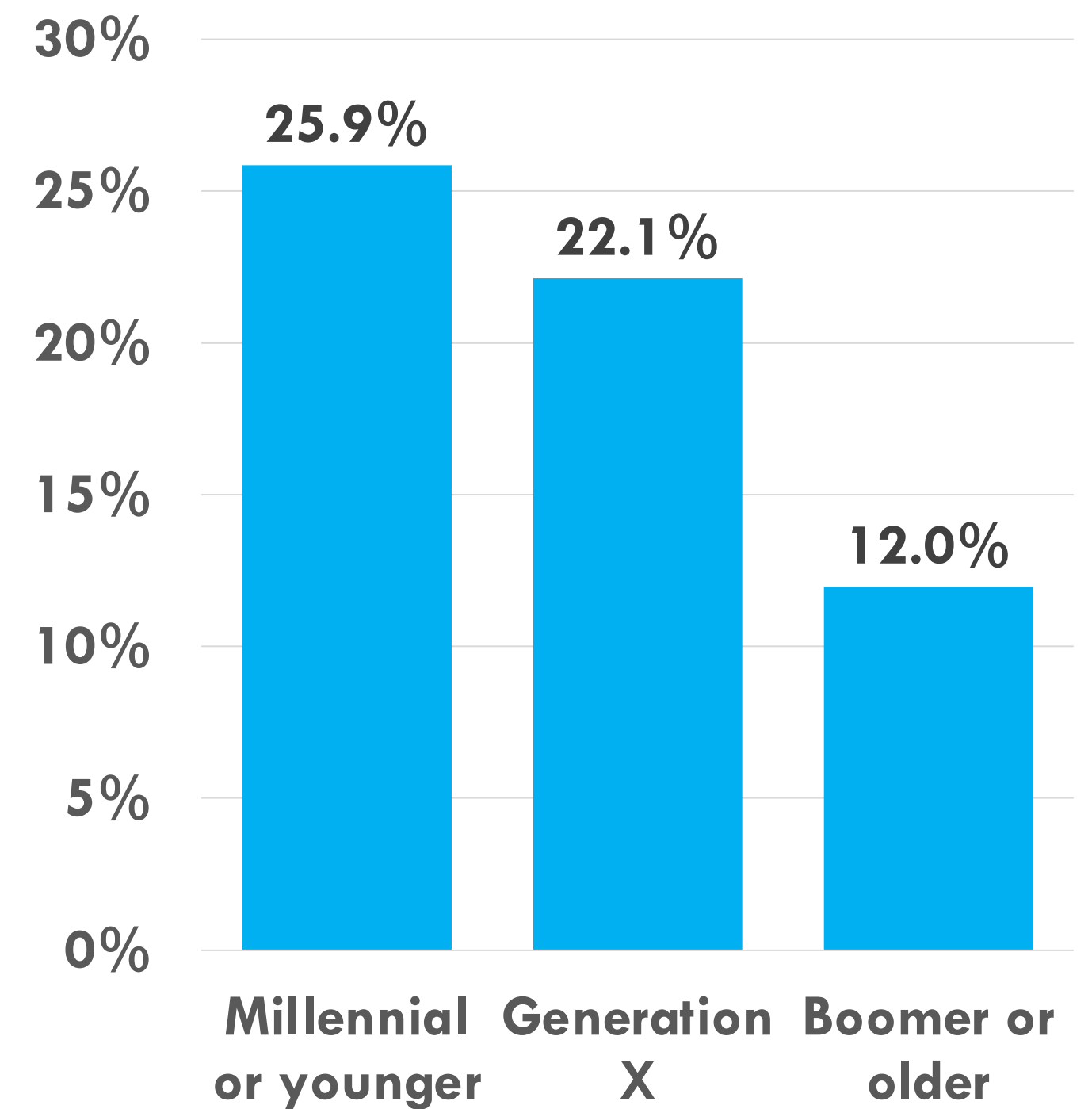
TikTok



Digital Influencers



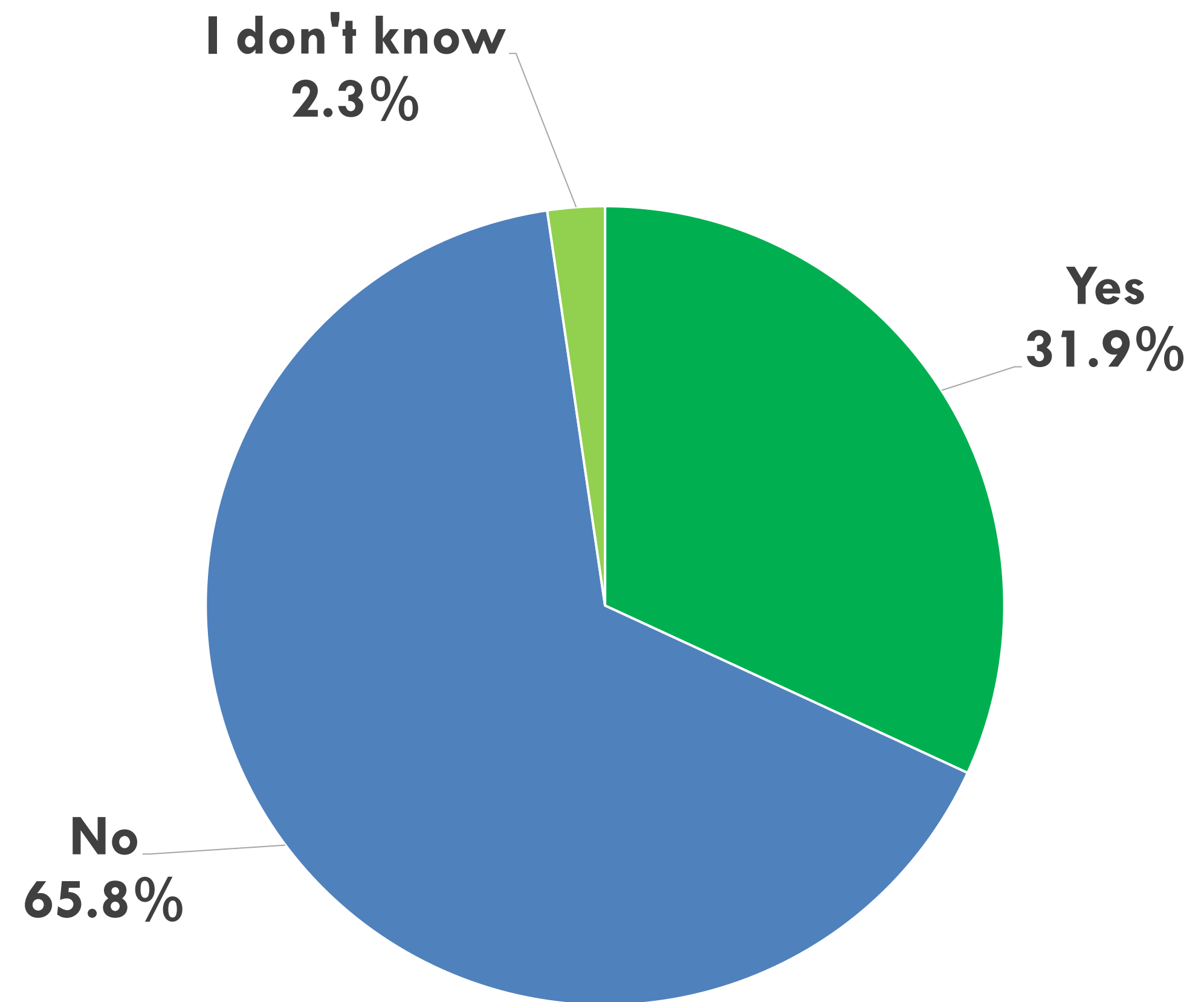
Streaming Video Services (YouTube, Hulu, etc.)



(Base: All respondents, 4,051 completed surveys. Data collected February 15-22, 2023.)

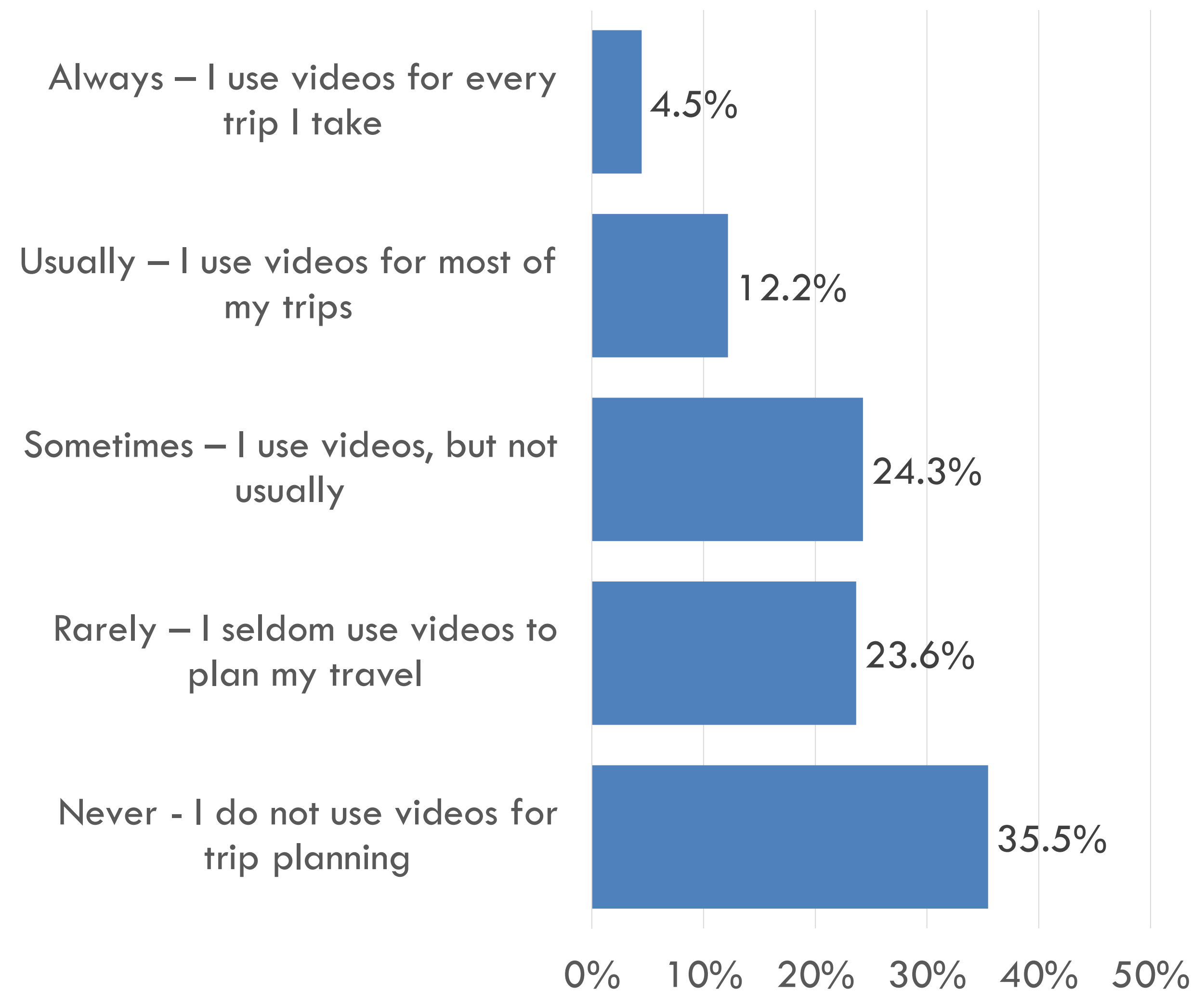
Question:

In the past 12 months, have you used **ONLINE VIDEO** including visiting video sharing websites (e.g. Youtube.com, AOL Video, TikTok or Google Video) to plan any travel?



Question:

How often do you use
ONLINE VIDEOS to plan
your travel? (Select one)



Destination  Analysts

**Insights from our
TikTok Cooperative
Research Study are
coming soon!**



TikTok
153k followers

Follow

TikTok
@_chang

CONTENT THAT INSPIRES:

EMERGING VIDEO TRENDS, FORMATS & PLATFORMS

TIM WRIGHT, DIRECTOR OF CONTENT STRATEGY

miles
PARTNERSHIP

VIDEO LANDSCAPE BY THE NUMBERS

This past summer, Google shared how consumers engage with video (primarily on YouTube)

- 92% of internet users aged 16-64 watch some kind of video content online each week
- 45% view video clips to be entertained or inspired
- 27% to relax or escape
- 14% to pursue a hobby or learn something new



(source: Think With Google/Ipsos MediaCT Tech Tracker)

HOW VIDEO INFLUENCES TRAVEL DECISIONS

When it comes to researching and planning trips, almost 50% of travelers use online video in some shape or form before they decide where to go:

- 65% use video when thinking about taking a trip
- 48% when thinking about the type of trip they want to take
- 67% use video when choosing a destination
- 63% when deciding on an accommodation in the destination



(source: Think With Google/Ipsos MediaCT Tech Tracker)

TRENDS AND OPPORTUNITIES IN DMO VIDEO MARKETING

Trend #1 – That’s Traveltainment!

Two-third of global travelers have considered and 39% have booked trips to destinations after seeing them on streaming shows or movies.

- *The White Lotus* effect: according to travel app Hopper, searches for Sicily flights and hotels increased by 50%, searches for Sicily increased 100%, searches for the San Domenico Palace increased 950% through the show’s run
- *Yellowstone* influence: University of Montana revealed that by the end of *Yellowstone*’s 4th season, worldwide interest in the show brought 2.1M visitors and \$730M in spending to Montana



TRENDS AND OPPORTUNITIES IN DMO VIDEO MARKETING

Trend #2 – The creator universe is expanding

Video production is no longer bound to Hollywood. Social media influencers (or podcasters, bloggers, etc.) can deliver engaging and authentic videos that make destinations more accessible.

- Less barriers to create and distribute content
- Fast audience growth is possible
- Instant audience engagement (liking, saving, sharing, commenting)
- You don't need huge budget, anyone can be an artist, you just need a good idea



TRENDS AND OPPORTUNITIES IN DMO VIDEO MARKETING

Trend #3 – Growth in video platforms and distribution

Video content is seemingly everywhere: from linear television and connected television to on-demand, live streaming and social channels

- Destinations can take an omnichannel approach and meet audiences where they're at no matter the platform, channel, screen size or device
- No need to be “everything, everywhere all at once”, it's important to find the right strategic mix across platforms
- DMOs can find the most effective video engagement on their own YouTube channels and websites



THE POWER OF YOUTUBE

Even if you're not creating regular content on YouTube, it's worth having a presence here in some capacity:

- YouTube is the world's second most visited website with over 14B monthly visits (right after its parent company, Google). That's more than Facebook, Wikipedia and Amazon!
- 694,000 hours are streamed on YouTube each minute - that's even more than Netflix where users stream just 452,000 hours of video
- In the U.S. 62% of users access YouTube daily spending an average of 19 minutes a day on the channel
- 22% of YouTube users are accessing the site via mobile with mobile users visiting twice as many YouTube pages as desktop users so it's critical to optimize video content for the tiniest of screens
- Key YouTube metric: watch time or the total amount of minutes viewers have spent watching a video. YouTube elevates videos with higher watch times in their search results and recommendations section

(source: Hubspot.com and Hootsuite.com)

COMPELLING ONLINE VIDEO INTEGRATION

Websites that include online video galleries and include video in their navigation capture audience's attention in a way written copy cannot.

- Users are almost 10x (95% vs 10%) more likely to retain a message when watch in a video vs. read in text
- More than 80% of all web traffic watches video
- Adding video to a webpage can increase conversion rates by 80%
- On average, people spend 2.6x more time on web pages with video than without
- SEO boost: a website is 53x more likely to reach the front page of Google if it includes video



(source: Think With Google/Ipsos MediaCT Tech Tracker)

COMPELLING ONLINE VIDEO INTEGRATION



FRESHWATER SPRINGS

FOLLOW THE RAINBOW

To dive or snorkel in one of Florida's freshwater springs is to experience an otherworldly sensation, a weightless flight through an underwater garden...



Tubing the Ichetucknee River



Ichetucknee



Wekiwa



Blue Grotto



Meet A Manatee

VENTURING OUT: PARK2PARK

Entertainment first 9-episode unscripted outdoor adventure series

- Outdoor sports enthusiast Raheim Robinson creates epic adventures for nature novices as they explore national and state parks, small towns and natural wonders throughout the U.S.
- Impactful multi-destination marketing program, presented opportunities to collaborate with 6 destinations: Texas, Arizona, North Carolina, Colorado, Delaware, Utah
- Multi-platform distribution: Outside TV (linear, on-demand, connected tv channels), Places.Travel (YouTube and website watch page), GoUSATV (streaming and linear channels)
- 45M episode views across all channels



Winner of the 2022 Platinum HSMAI Adrian Award for Integrated Campaign!

VENTURING OUT: PARK2PARK



MEET MY ABUELA

Entertainment first 8-episode unscripted reality dating series

- Spotlights the culture and traditions of Tampa Bay's Latino community as seen through the eyes of couples seeking the approval of their abuelas
- Destination integration throughout Tampa Bay featuring local restaurants, attractions and historic sites.
- Multi-platform and dual language distribution: Vix (Univision VOD Spanish language streaming app), Visit Florida YouTube (with Spanish subtitles), Vizio Watch Free+ (linear and on-demand channels with Spanish subtitles), Places.Travel (website watch page)



- *5M+ minutes watched on VisitFlorida YouTube*
- *7K+ episode views across Vix streaming channels*
- *1200+ page views across VisitFlorida.com and Places.Travel watch pages with an average 6:40 time on page*

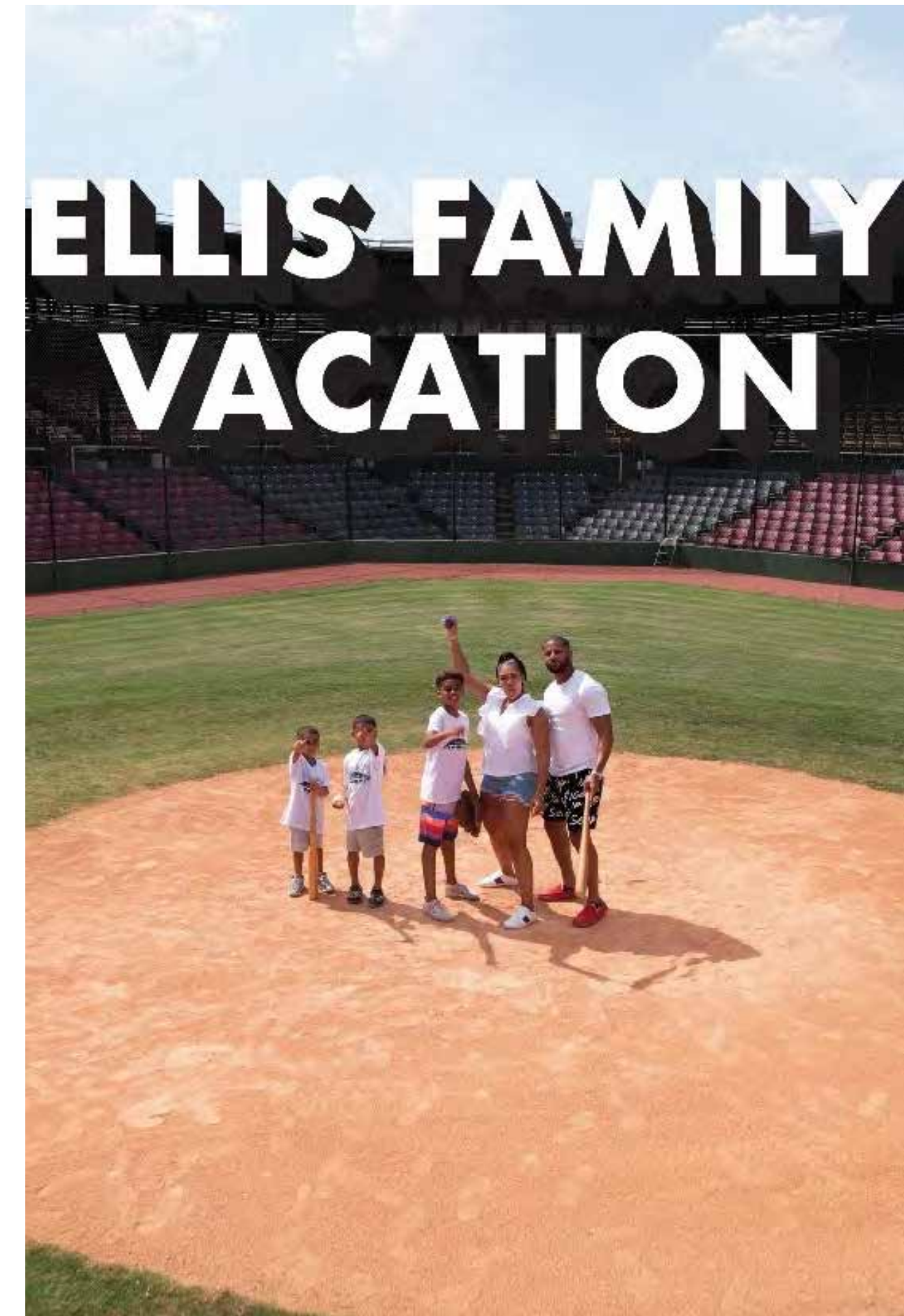
MEET MY ABUELA



ELLIS FAMILY VACATION

Entertainment-first 4-episode unscripted reality travel series

- Follows former NFL player Devale Ellis, his wife, influencer/podcaster Khadeen, and their 4 kids as they experience fun and unexpected adventures while traveling across the U.S.
- Destination integration features attractions throughout Washington DC, Birmingham, New Orleans and the Grand Canyon
- Multi-platform distribution across GoUSATV streaming, linear and YouTube channels



In its first 4 weeks on GoUSATV YouTube, the series has already garnered 275K+ views, boosted by Khadeen Ellis' social promotions reaching her 1.2M social followers!

ELLIS FAMILY VACATION



TREAT YOURSELF: ULTIMATE CHEAT MEALS OF FLORIDA – ST. PETE

Entertainment- first scripted culinary show built for a YouTube audience

- Starring real-life foodie couple Monica Joelle Ortiz and Tyler Picchi indulging in the most extravagant, calorie busting dishes imaginable
- Destination integration features restaurants and attractions throughout St. Pete/Clearwater, Florida
- Distribution on Visit St. Pete Clearwater YouTube channel
- Episode 2 already in the works



In first 4 months on YouTube, episode has earned 210K+ views.

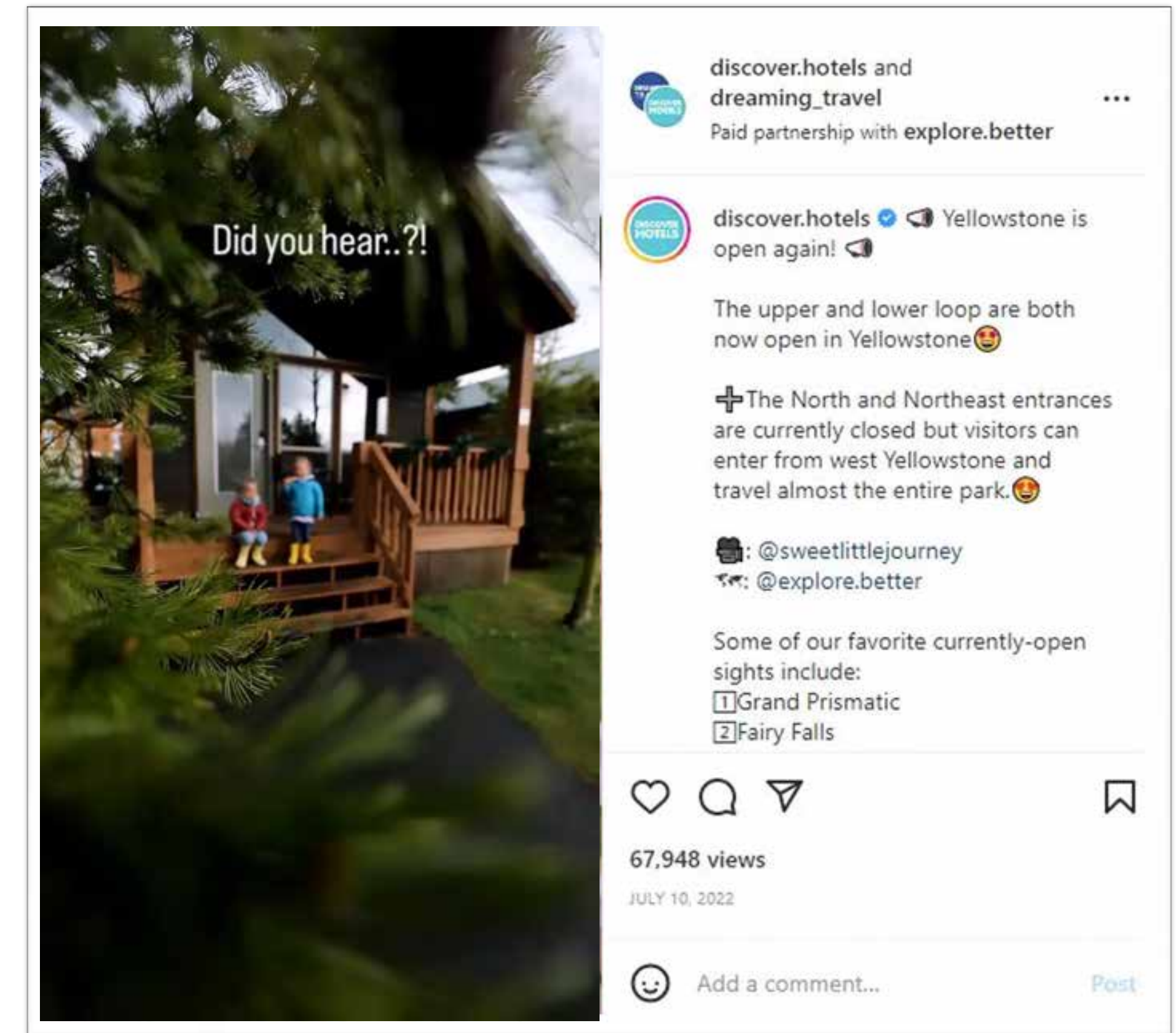
TREAT YOURSELF: ULTIMATE CHEAT MEALS OF FLORIDA – ST. PETE



EXPLORE BETTER INFLUENCER CAMPAIGN

Influencer-led brand awareness campaign for Delaware North's new consumer-facing travel site ExploreBetter.com

- Expanded the creator universe by partnering with micro-influencers who were sent to national parks to create original short-form vertical videos for Instagram reels
- Micro-influencers (social followers anywhere between 1,000 - 100,000) bring a highly engaged audience and a more budget-friendly option to influencer marketing
- All assets could be repurposed into FB ads driving traffic to site
- Leveraged social amplification through TripScout, a social distribution network with dedicated, thematic channels on Instagram



Since July 2022, this reel has had a total of 67k+ views and 10k+ engagements (likes, shares, saves, comments).

5 TAKEAWAYS

Why video needs to be a part of a DMO's marketing strategy:

1. Captures attention: the visual appeal of videos, combined with music and sound effects, creates a more memorable and entertaining experience for your audience than the written word
2. Showcases destinations: video gives potential travelers a more "real world" glimpse into the experiences they could have in a variety of locations
3. Builds trust: by featuring real people and real places, videos can create a sense of trust by providing an authentic view of a destination (especially true for Tik Tok videos and Instagram Reels)
4. Increases engagement: video content is more likely to be shared on social media
5. Improves SEO: videos can improve website SEO by keeping an audience on a page longer -- Google recognizes this engagement and may rank the site higher in search




Q&A

Thank you

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Additional Resources

Destination  Analysts

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THE STATE OF THE AMERICAN TRAVELER: DESTINATIONS EDITION

Research, slides and other resources will be available at

www.milespartnership.com/SAT

www.destinationanalysts.com



Destination  Analysts

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The State of the
American Traveler:

Special Edition Quarterly Webinars

- Technology Edition:
June 20, 2023
- Traveler Segments Edition:
August 29, 2023
- Destination Management Edition:
November 7, 2023

Register at

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North American Edition

TIME FOR

DMOCRACY

Community Engagement Best Practices
www.TimeforDMOcracy.com



North America & South Pacific Lead

In association
with:



and



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GLOBAL
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MOVEMENT



Program Creator & European Lead

27 for COP27

UPDATED TWO-PART WHITE PAPER SERIES

Updated for COP27. 27 Actions For Destinations and Their Tourism Industries to Address Climate Change



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In association with:



A person in a dark jacket is seen from behind, looking out over a scenic mountain landscape. In the foreground, a wooden railing is visible. The middle ground features a calm lake reflecting the surrounding green forest and the towering, rocky mountains in the background. The sky is clear and blue. A white box with the text 'Q&A' is centered over the mountain range.

Q&A

Destination  Analysts

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