

With You



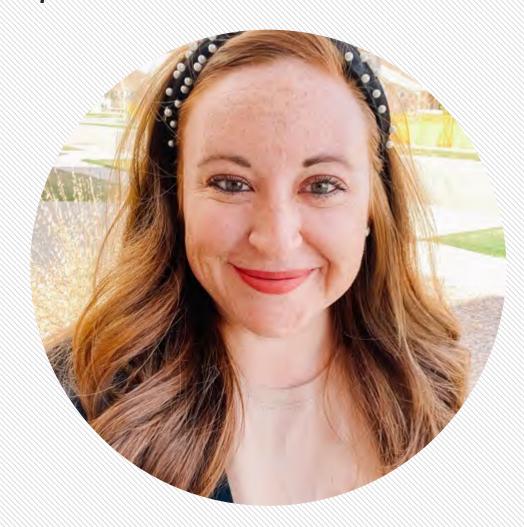
Chris Adams
Head of Research & Insights
Miles Partnership



David Reichbach

Sr. Director of Analytics & Data Security

Destination Analysts



Danelle Amos Media Director Miles Partnership

THE STATE OF THE AMERICAN TRAVELER: TECHNOLOGY EDITION

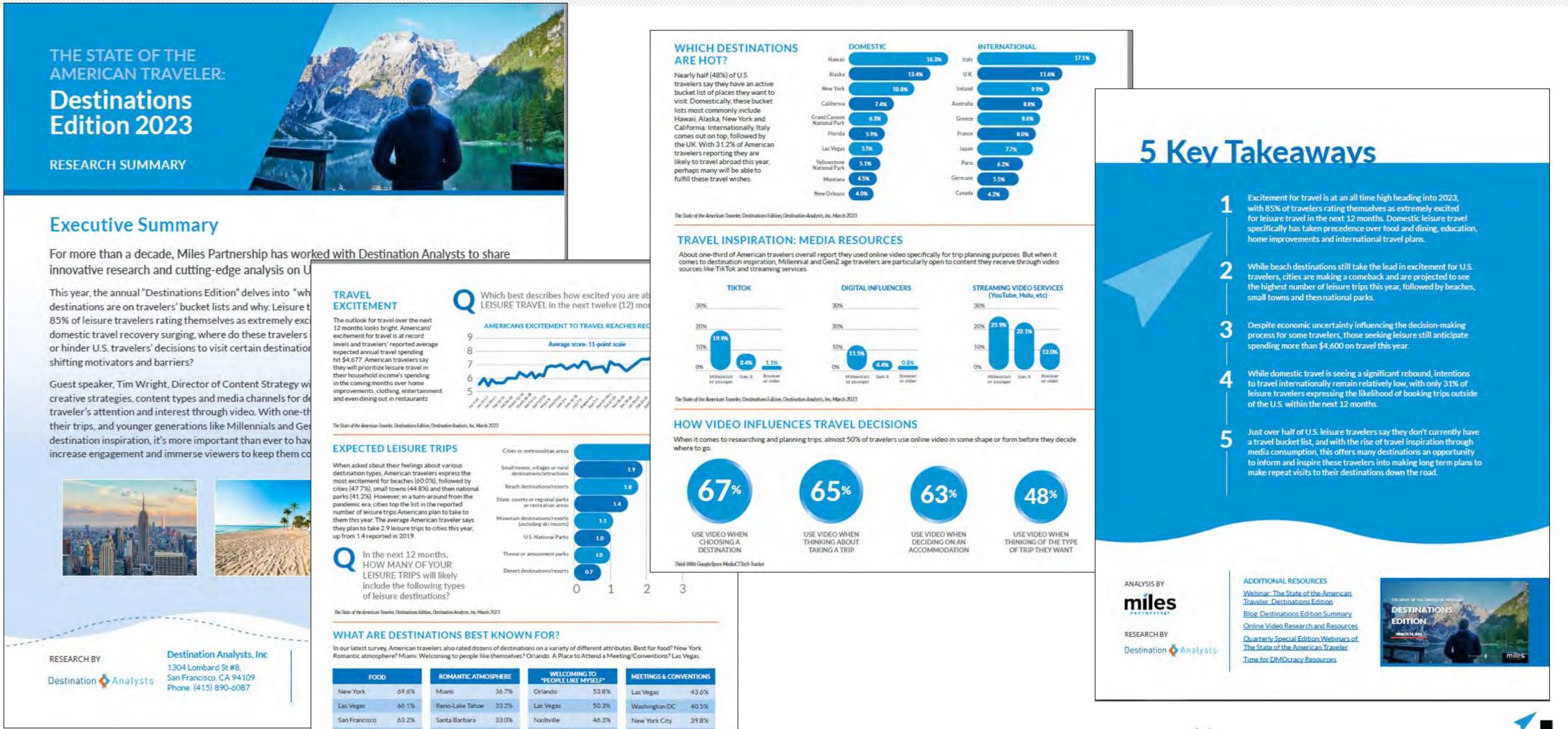
Research, slides and other resources will be available at www.milespartnership.com/SAT www.destinationanalysts.com







RESEARCH SUMMARY: THE STATE OF THE AMERICAN TRAVELER SPECIAL EDITIONS



The State of the American Traveler, Destinations Edition, Destination Analysis, Inc. March 2023







The State of the American Traveler Survey

Technology Edition

Presentation of Findings

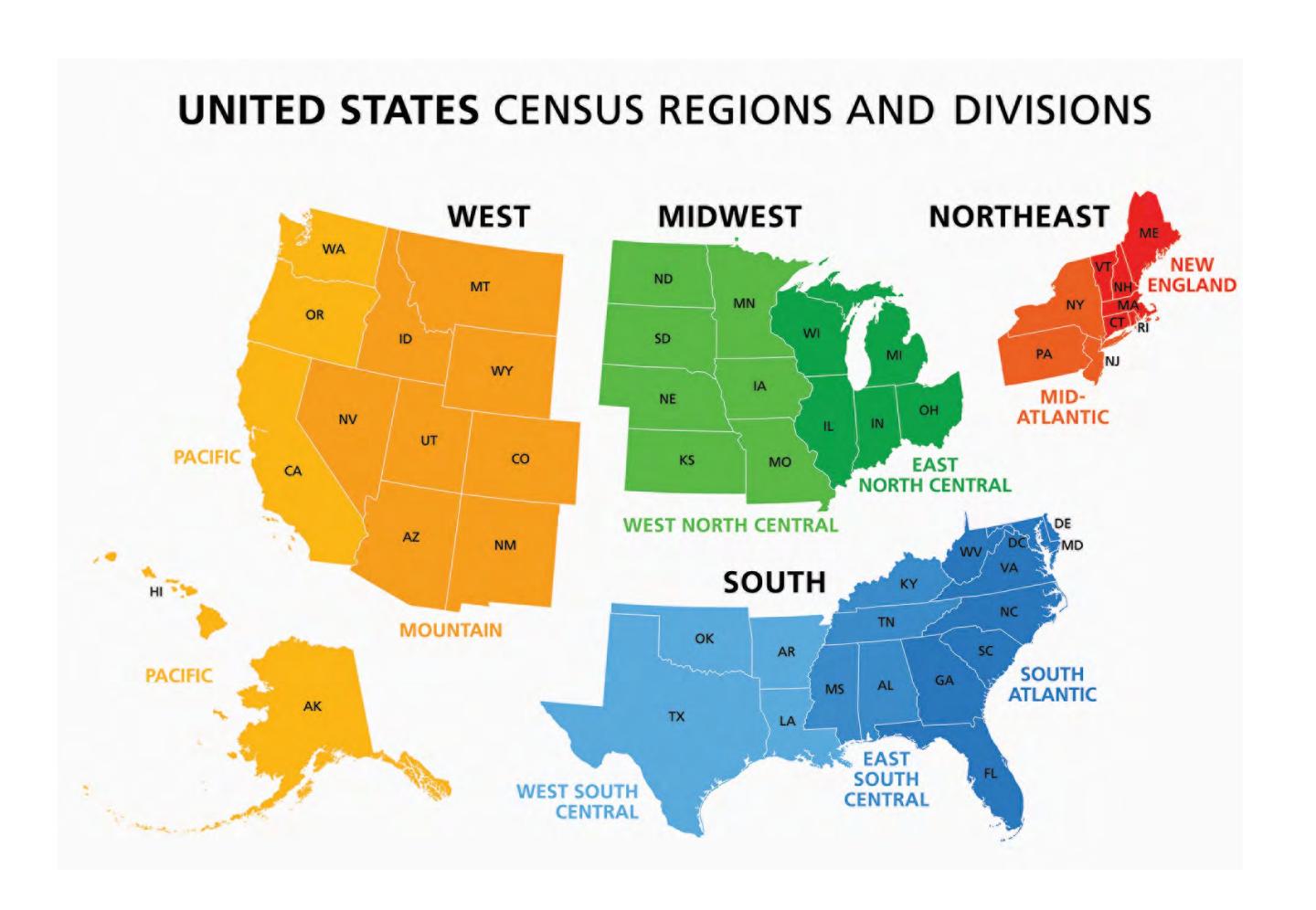
June 2023





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 May 17-25, 2023
- 4,000+ fully completed surveys collected each wave
- Confidence interval of \pm 1.55%
- Data is weighted to reflect the actual population of each region

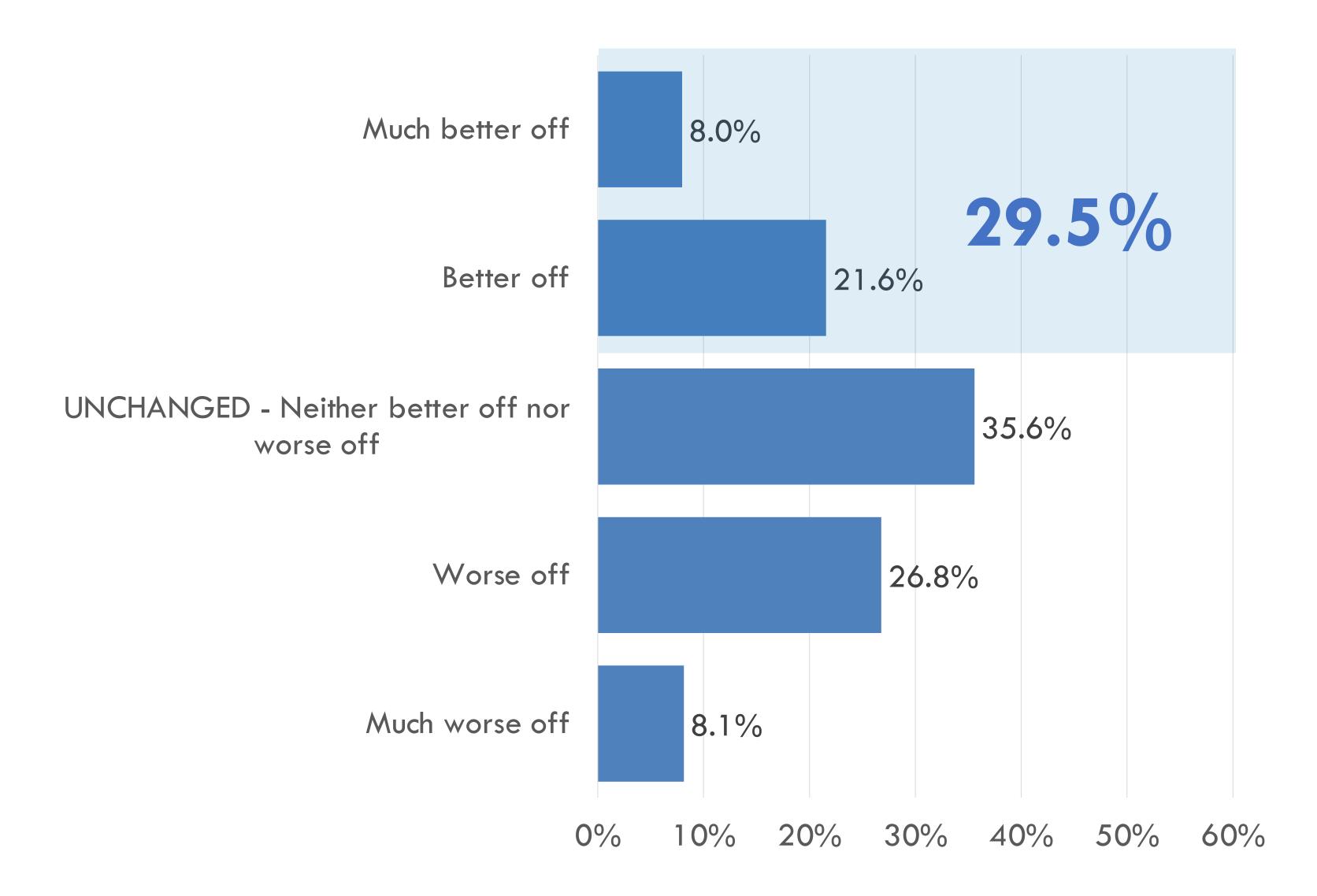






CURRENT HOUSEHOLD FINANCIAL STATUS

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





(Select one)

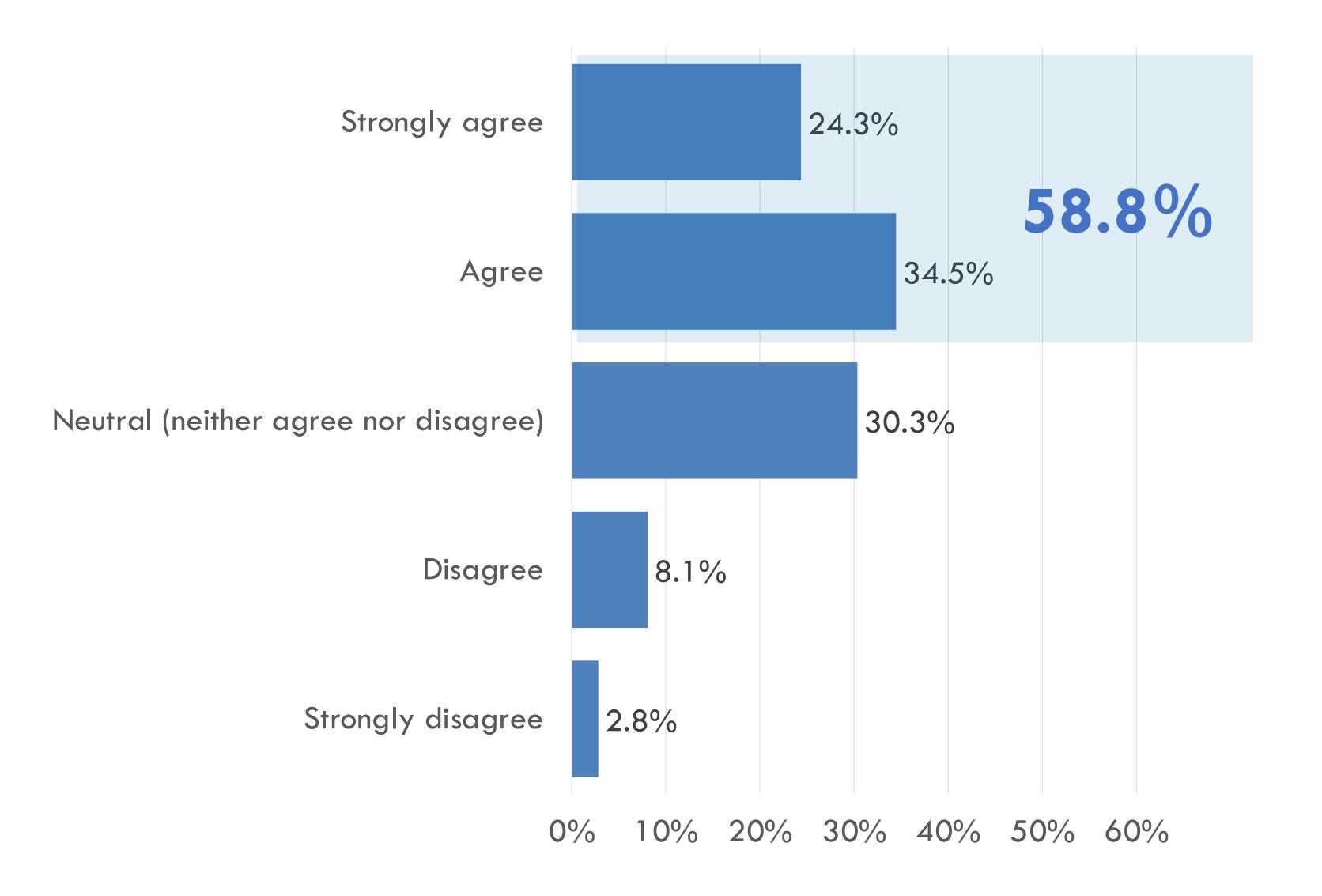
EXPECTATIONS ON UNITED STATES ECONOMIC RECESSION

Question: I expect the United

States will enter an economic

recession sometime in the NEXT

SIX (6) MONTHS.





EXPECTATIONS ON UNITED STATES ECONOMIC RECESSION

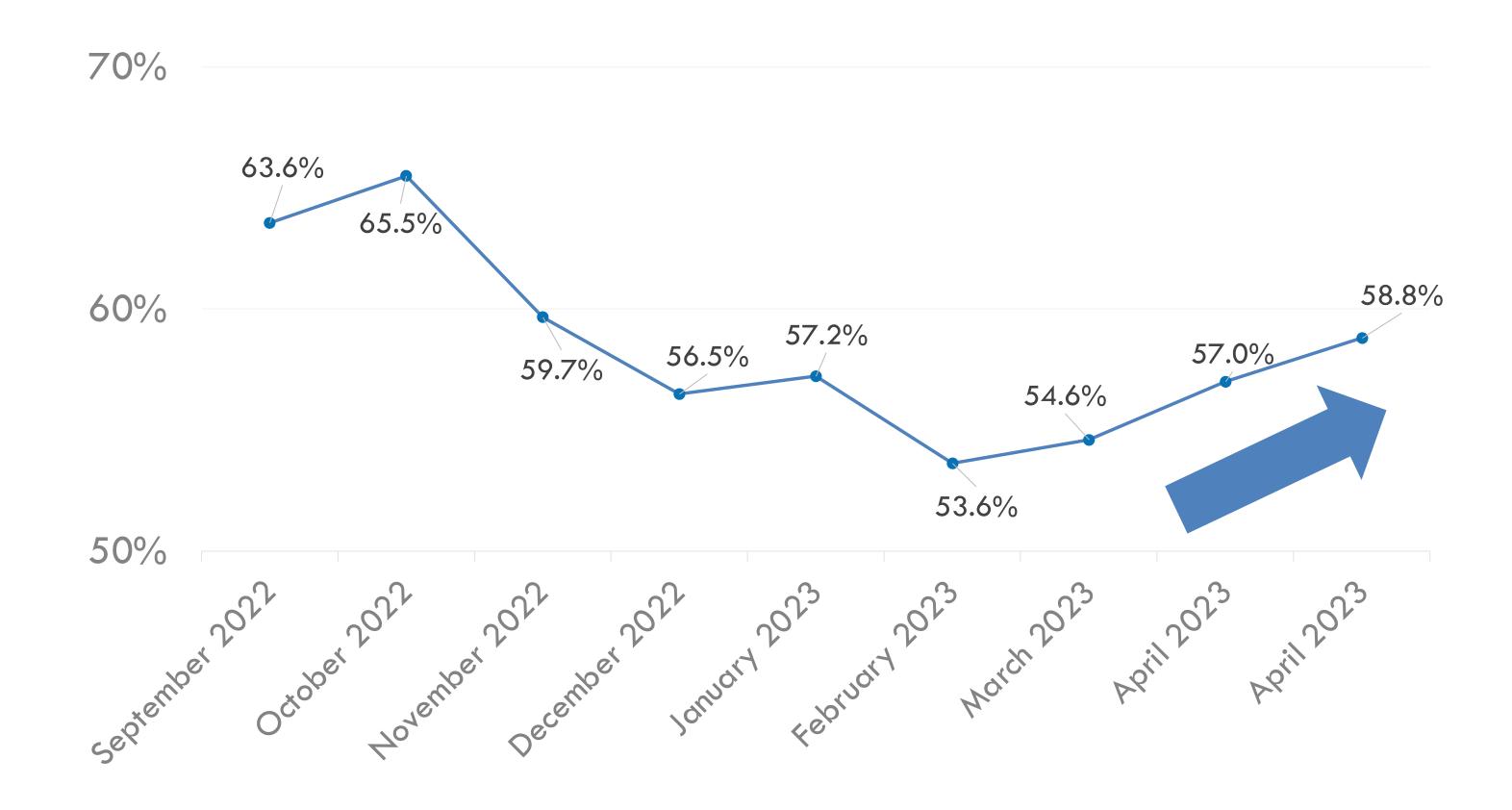
Question: I expect the United

States will enter an economic

recession sometime in the NEXT

SIX (6) MONTHS.

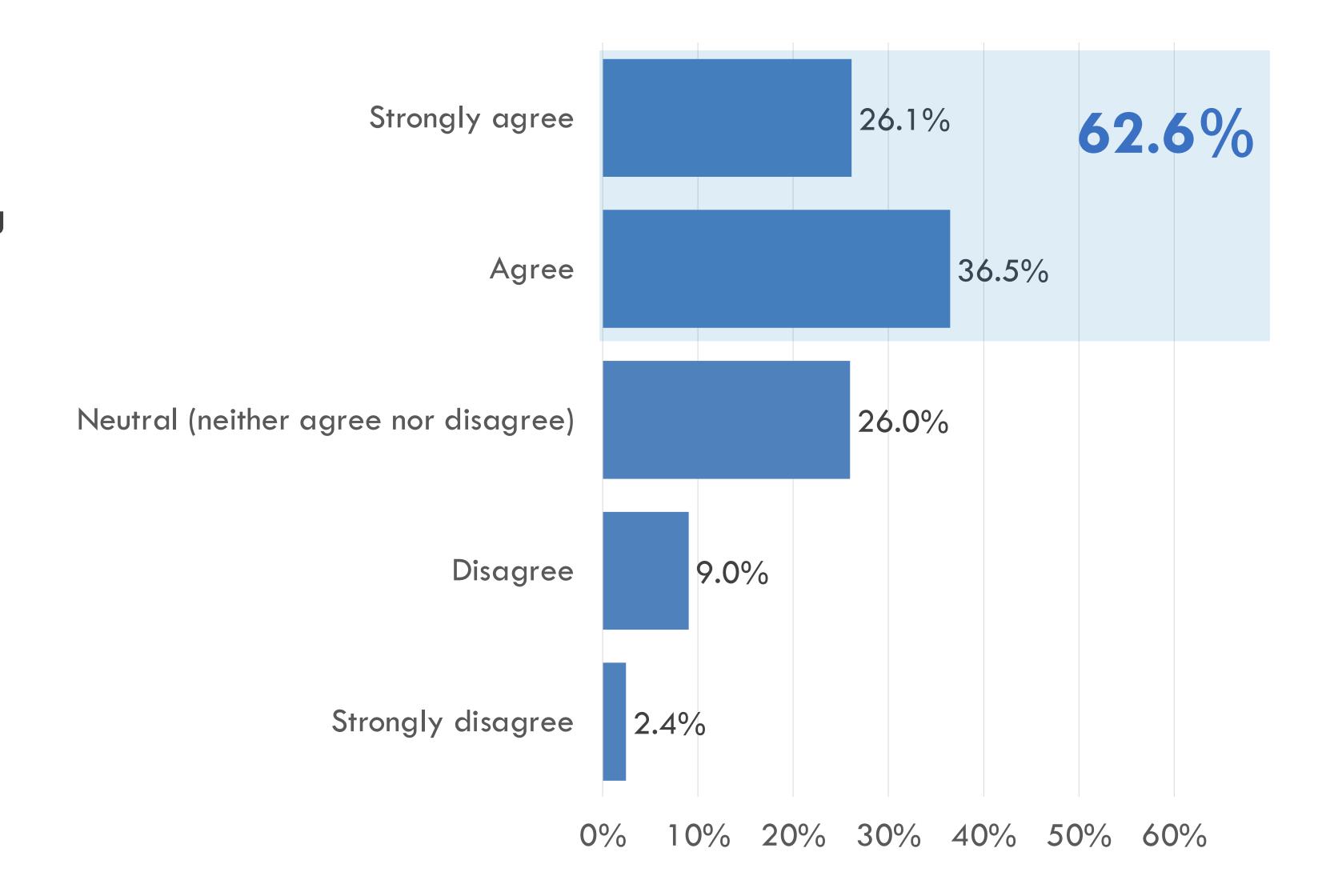






PERSONAL FINANCIAL CONCERNS REGARDING UPCOMING RECESSION

Question: Right now, I am being careful with my money because I'm concerned about an upcoming recession.





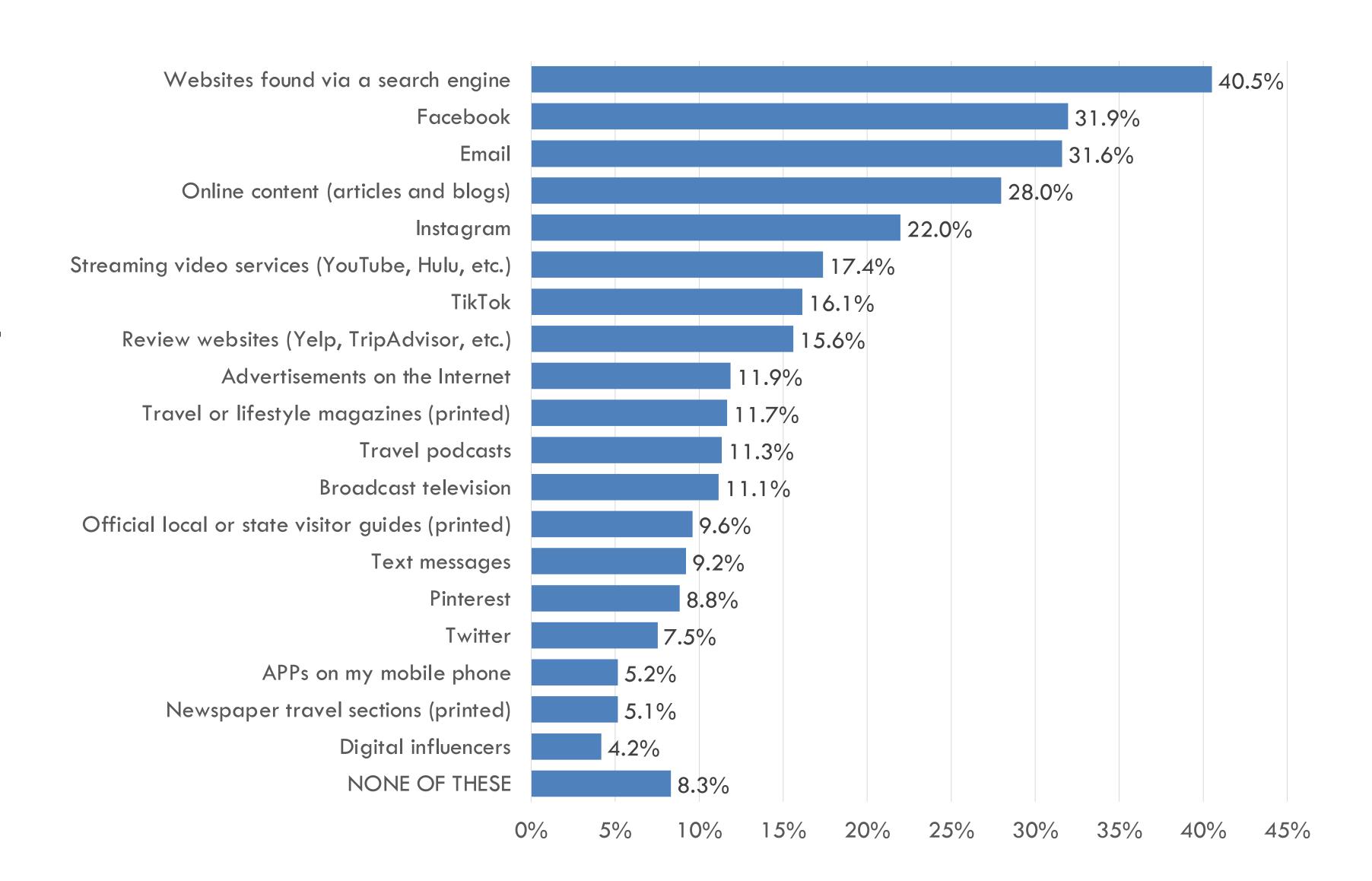
How Americans Plan Travel



THE BEST WAY TO REACH TRAVELERS

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?

(Please select all that apply)





(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

BEST WAY TO REACH TRAVELERS

Millennial or Younger Facebook 37.2% 33.1% Instagram Websites found via a 31.2% search engine TikTok 29.3% Online content (articles and 28.1% blogs) **Email** 27.6% Streaming video services 20.0% (YouTube, Hulu, etc.) Travel podcasts 14.6%

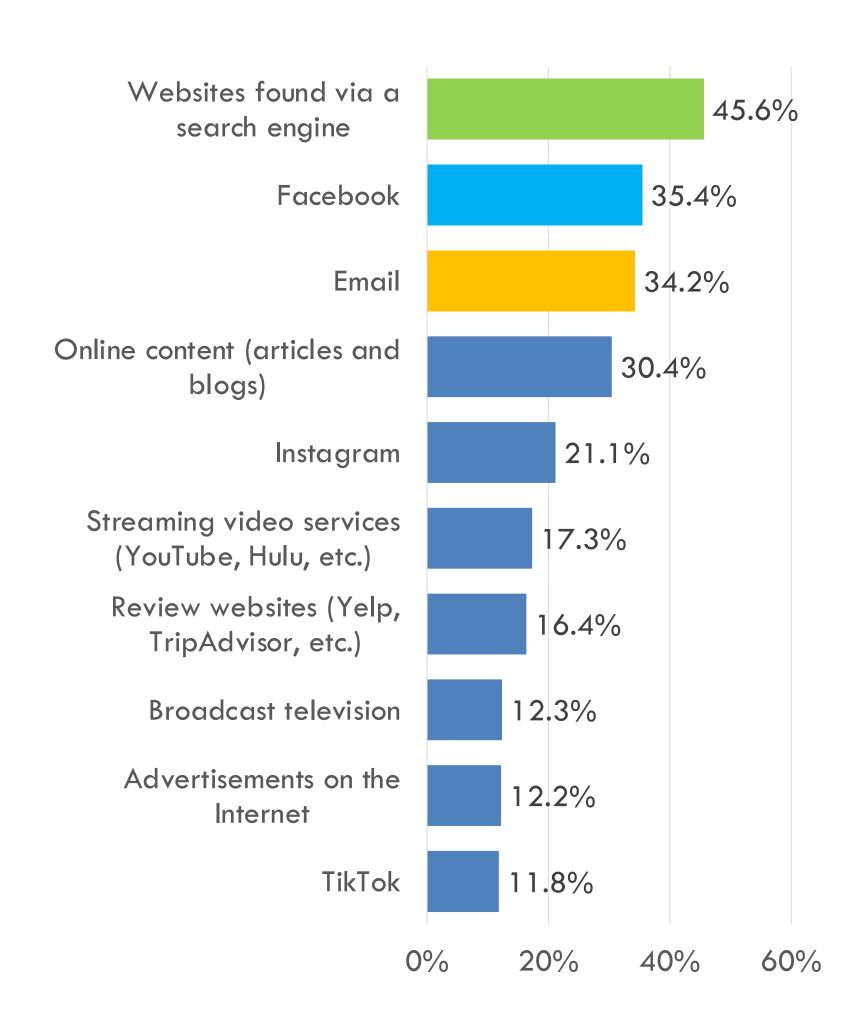
14.0%

12.4%

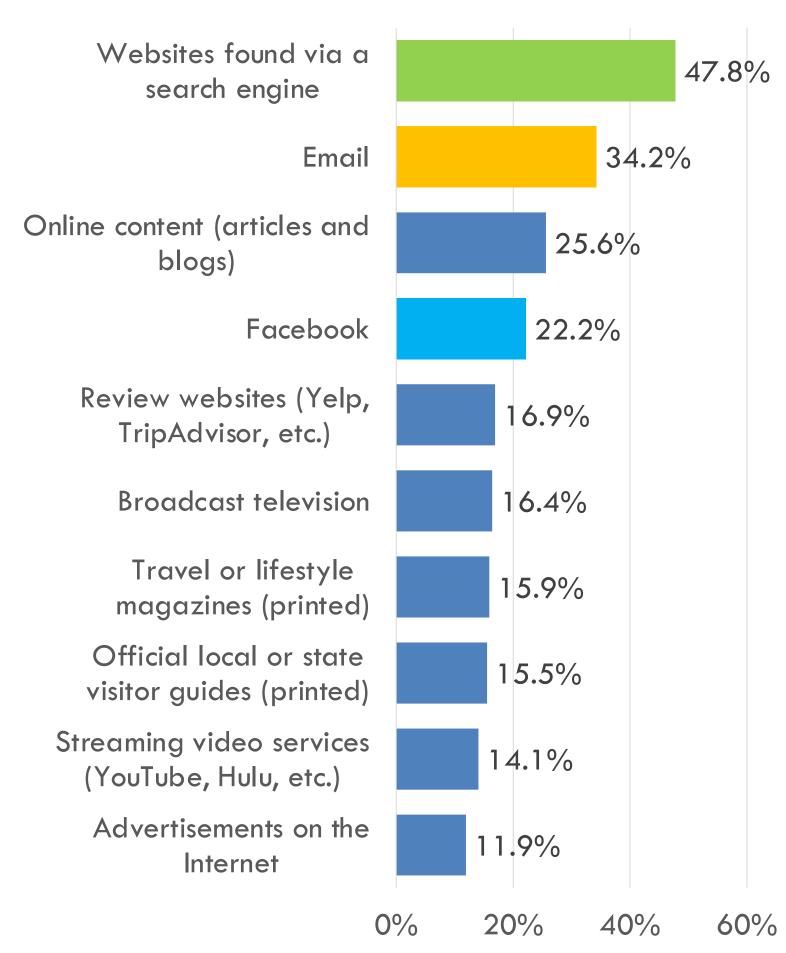
20%

60%

Generation X



Boomer or Older





Review websites (Yelp,

TripAdvisor, etc.)

Twitter

0%

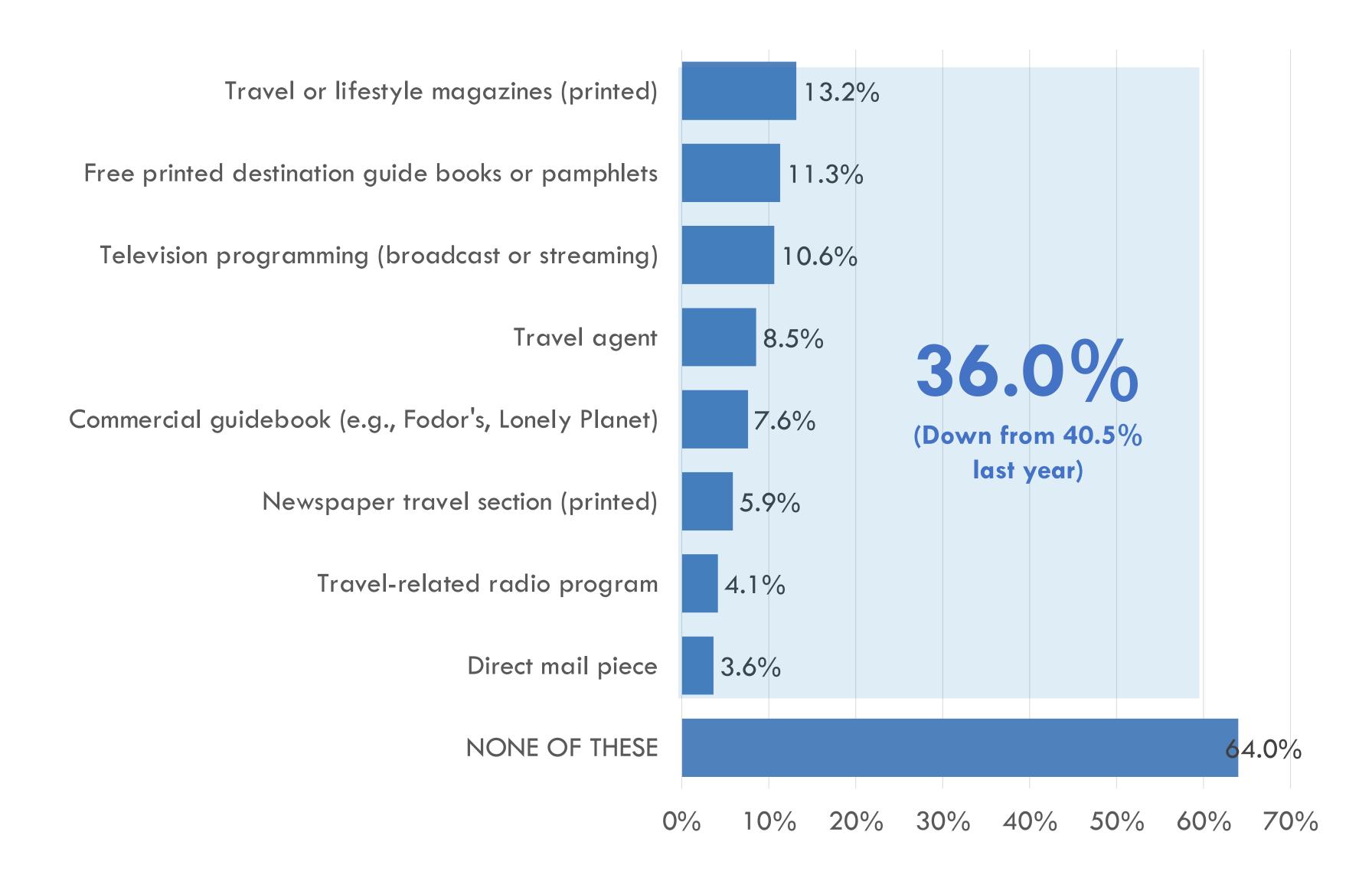
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

OFFLINE RESOURCES USED IN TRAVEL PLANNING

Question: In the PAST 12

MONTHS, which of these resources have you used to help plan your travel? (Select all that apply)

PLEASE ONLY CHECK IF USED FOR
TRAVEL PLANNING, IDEAS OR
INSPIRATION



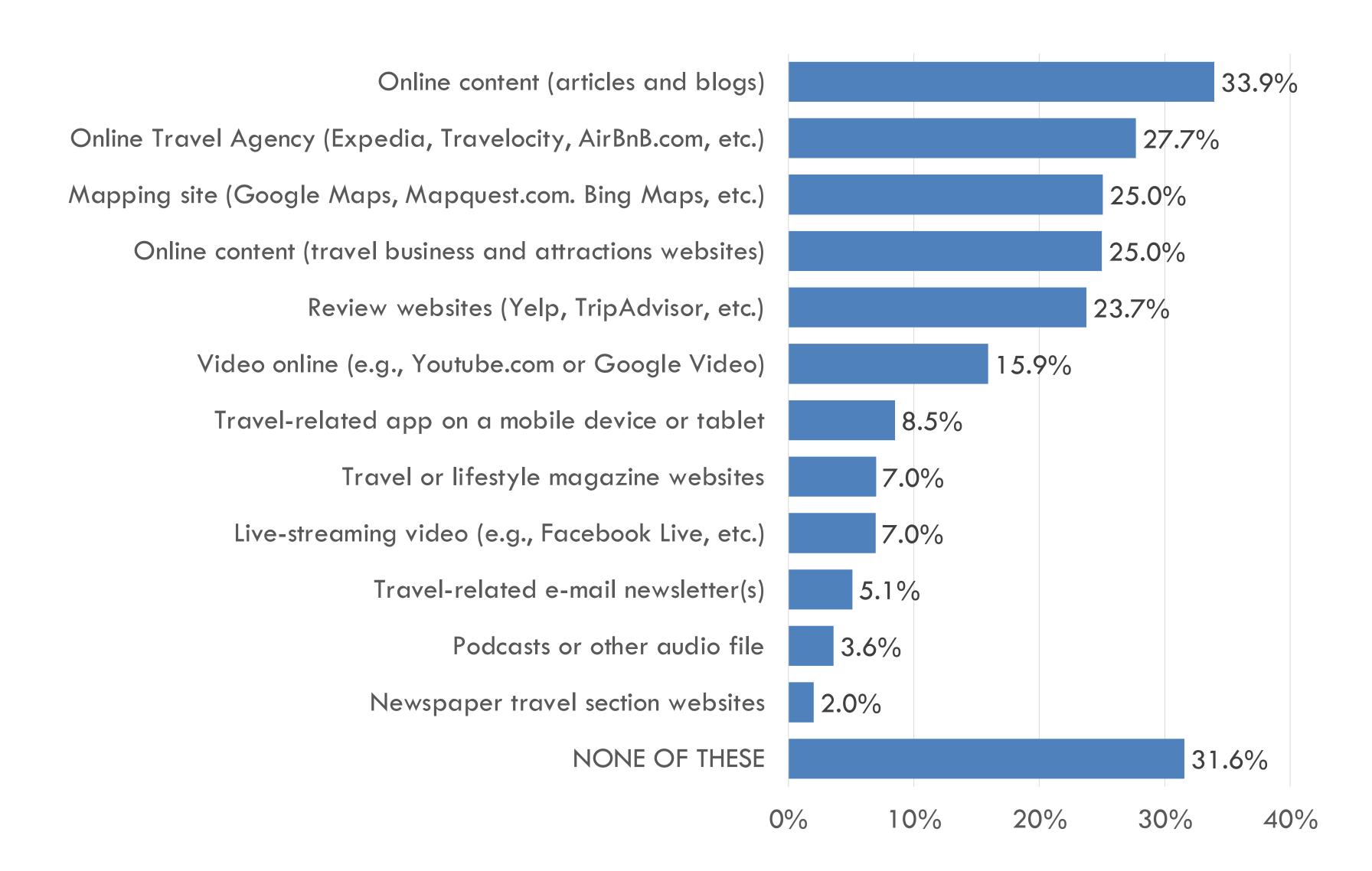


ONLINE RESOURCES USED IN TRAVEL PLANNING

Question: In the PAST 12

MONTHS, which of these resources have you used to plan your travel? (Select al apply)

PLEASE ONLY CHECK IF US
TRAVEL PLANNING, IDEAS
INSPIRATION



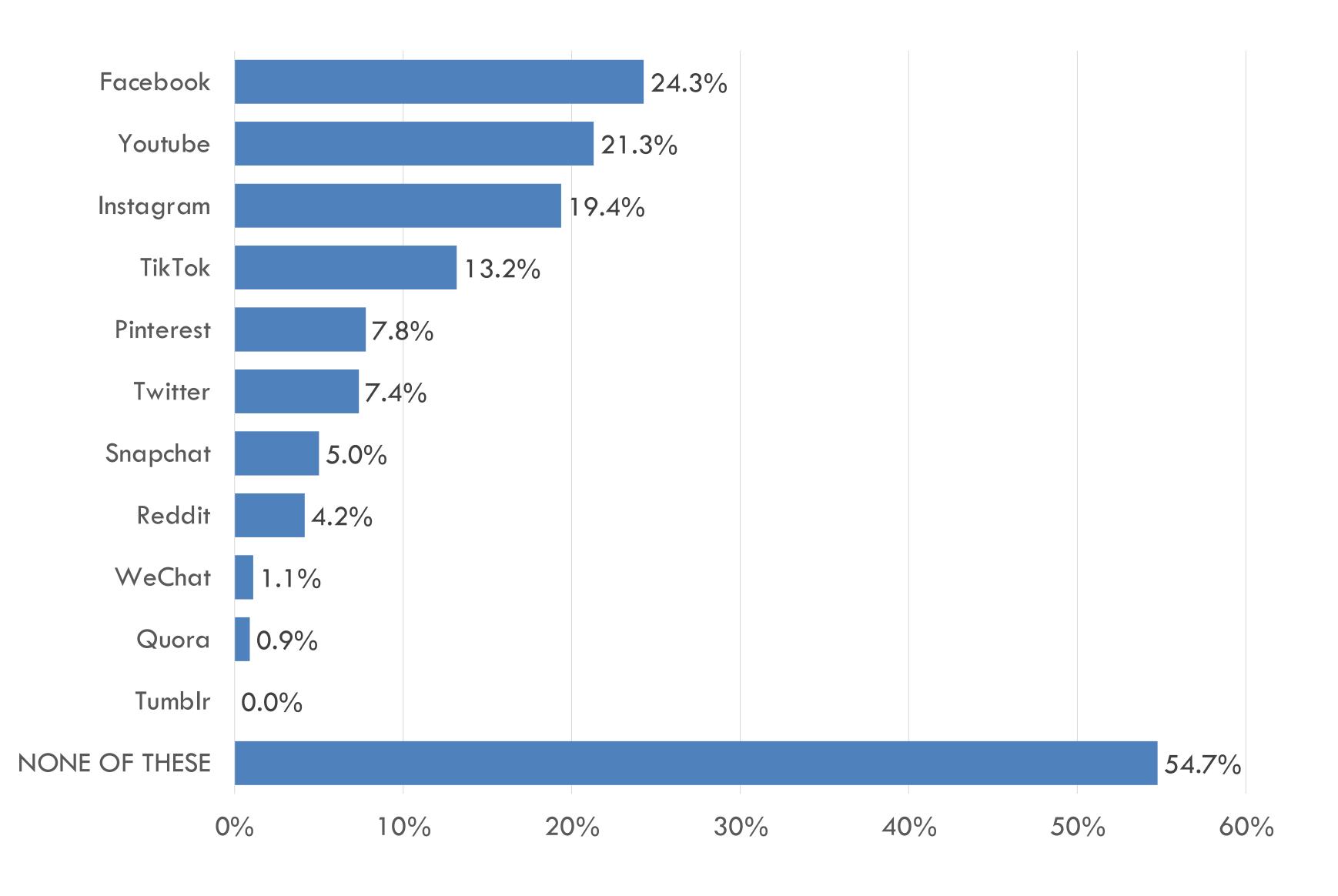


SOCIAL MEDIA USED TO PLAN TRAVEL

Question: In the PAST 12

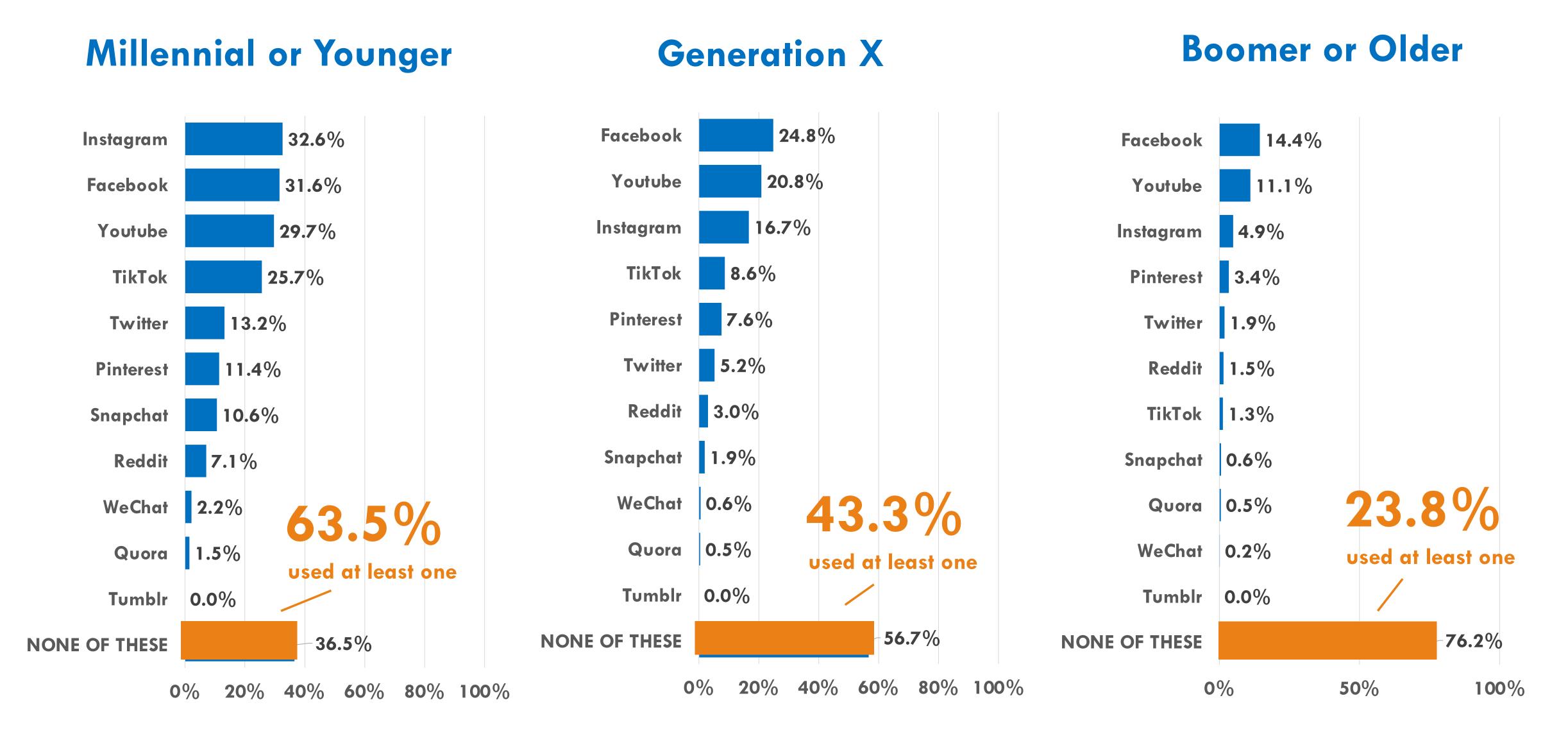
MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS? (Select all that apply)

PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION





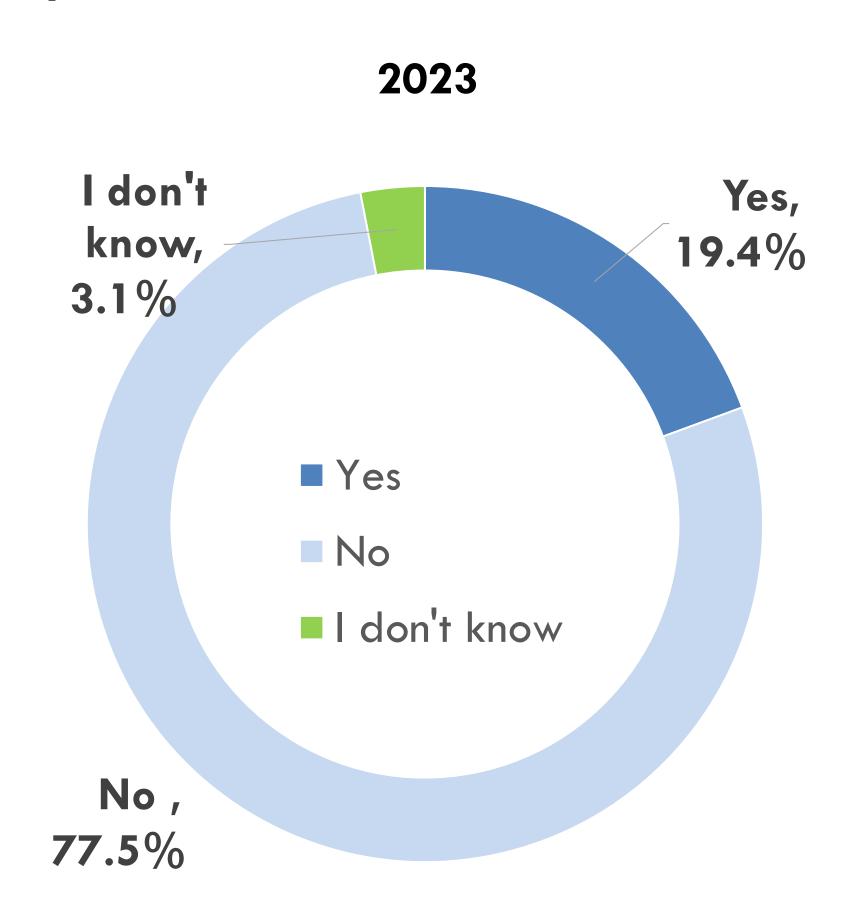
SOCIAL MEDIA USED TO PLAN TRAVEL

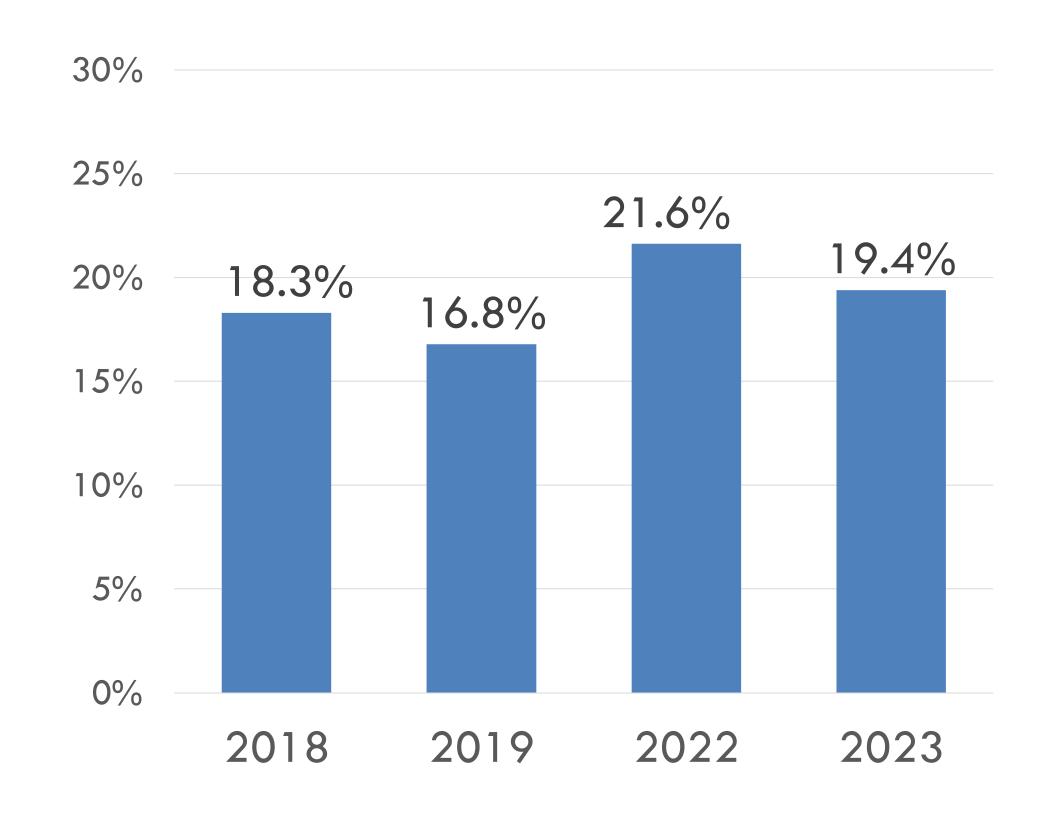




DIGITAL INFLUENCERS

Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?

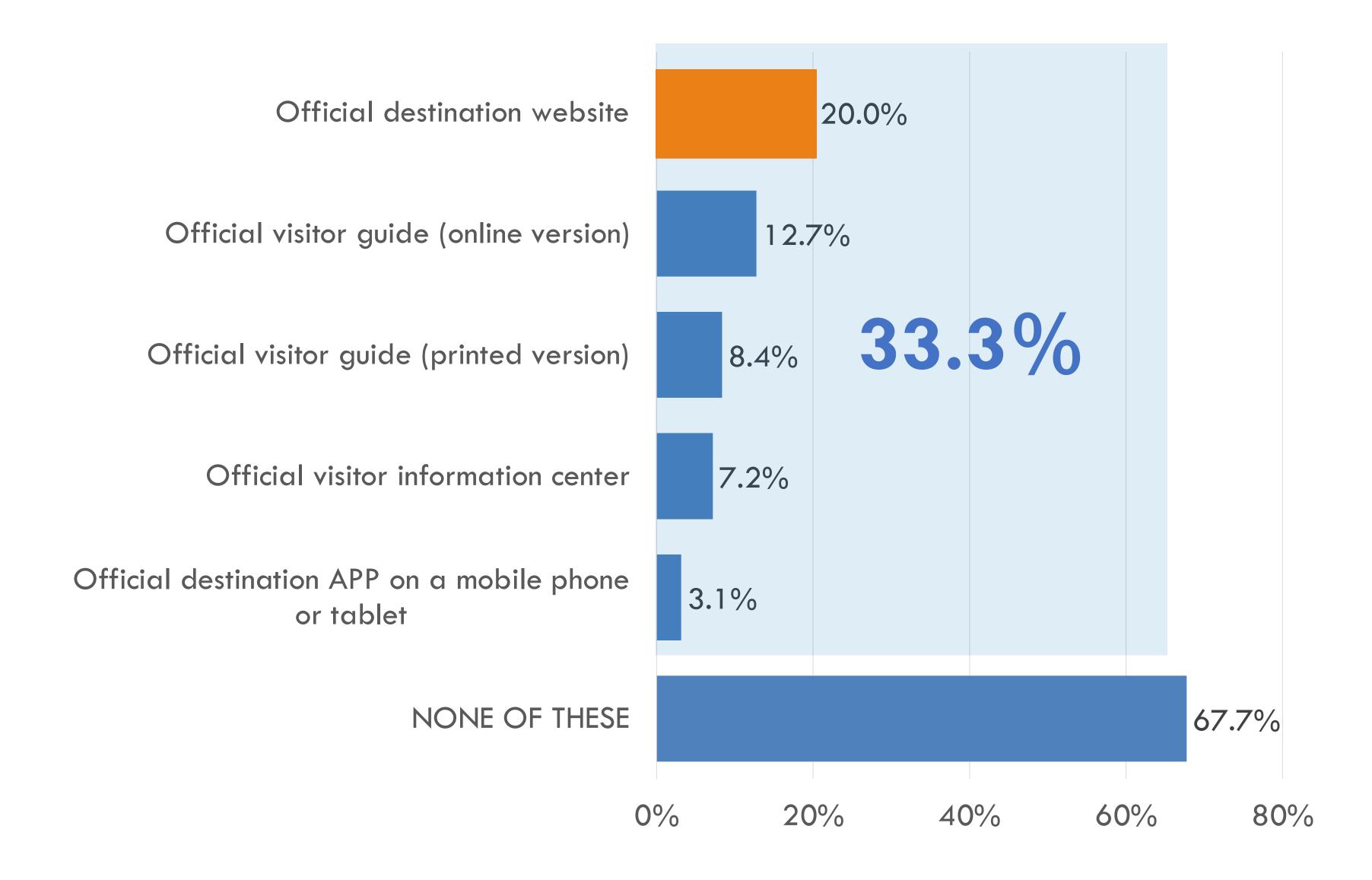






DMO RESOURCES USED

Question: In the PAST TWELVE (12)
MONTHS, have you used a
destination's official local Visitors
or Convention Bureau (or Chamber
of Commerce), or state or national
government tourism office to help
plan any travel? If so, which
resources did you use? (Select all
that apply)



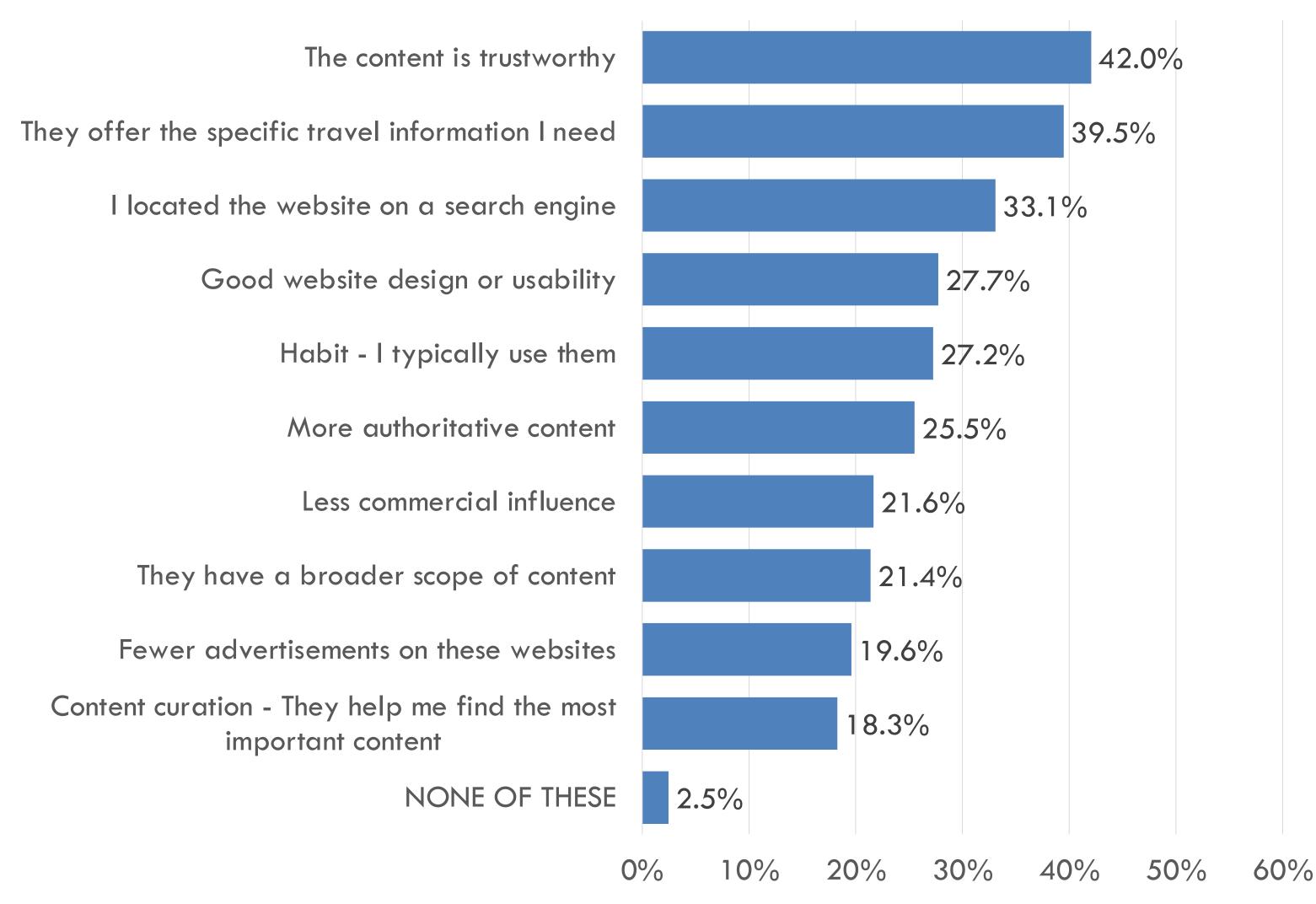


WHY TRAVELERS USE DMO WEBSITES

Question: Which of the following (if any) are reasons you decided to use such a destination's

official website?

Travelers Using DMO Websites





(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

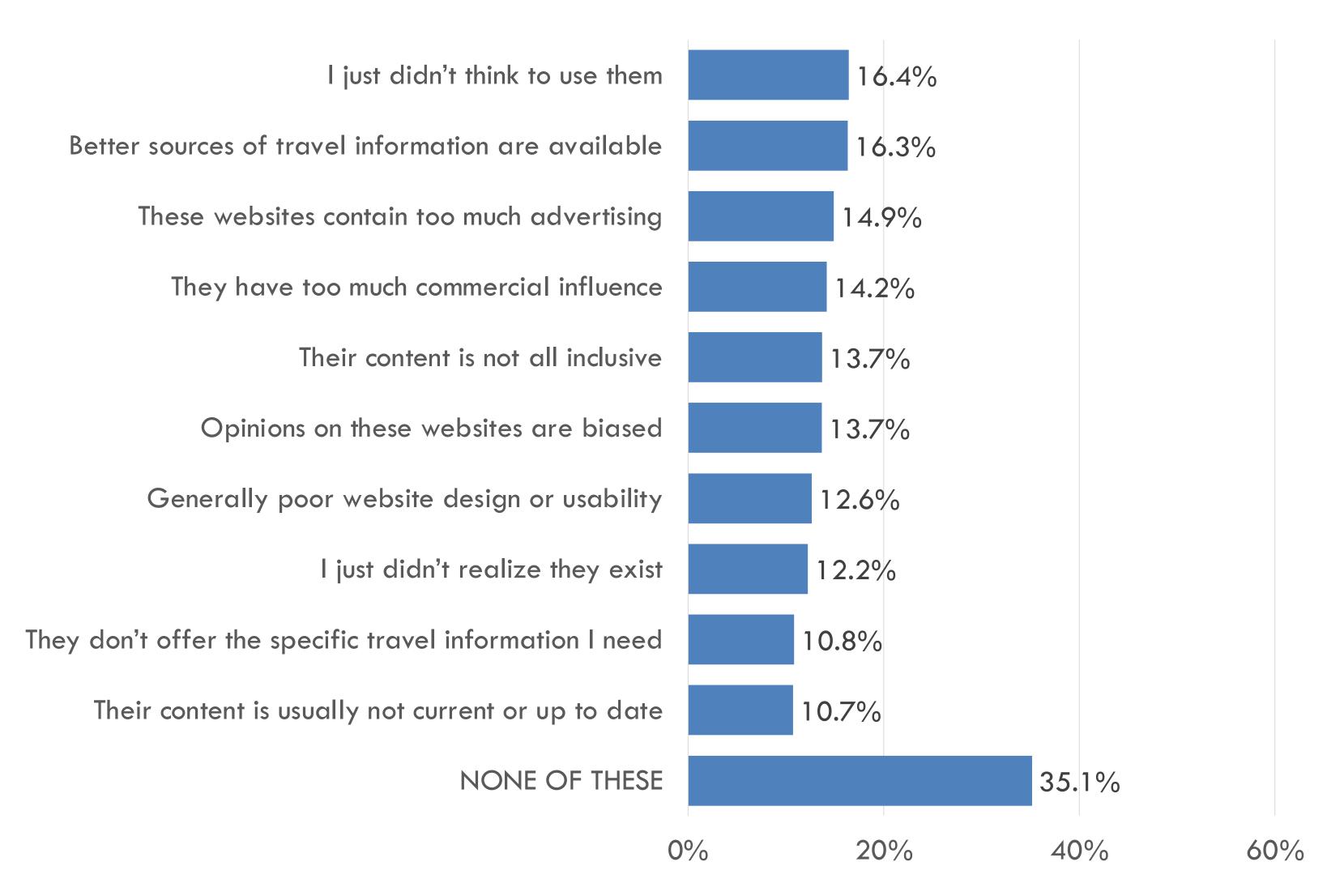
WHY TRAVELERS DON'T USE DMO WEBSITES

Question: Which of the

following (if any) are reasons you DID NOT TO USE a destination's

official website?

Travelers Who Did Not Use DMO Websites





The Hyper-Informed Traveler

2014-2022: Shifts in Med

Hyper-Informed Traveler The complex, fragmented & expanding media use ces in 2022 of US leisure travelers 2008 - 2022



49% 30.6%

Use Print Publications: Visitor Guides, Brochures, Magazines

Print use rose to 47% in 2018 and then dropped in 2020 due to the impact of COVID-19 and less travel to locations where many travelers pick up print pieces. 41% 64.3%

Use Smartphones To Access Travel Information*

More than 90% of Generation Y and Z travelers use smartphones in trip planning including a higher use of social media. Younger travelers are more likely to be unaware that DMOs exist and offer valuable content; a critical marketing challenge for DMOs.



31% Use Offici

From a









2021









2022





A summary of research The State of the American Traveler Destination Analysts 2008 - 2022

2020

41% 53%

Seek Out Reviews, Ratings and **User-Generated Content for Ideas** and to Validate Their Selection

Reviews and ratings remain important especially for around 40% of travelers who heavily rely on them for decisions on where to stay, dine or do activities. Google is now the single most important platform for businesses to review and manage reviews.

2014



40% 44.3%

Use Social Media in Trip Planning

Most travelers use social media to see or share trip photos; encourage your guests to share their experience through services like free Wi-Fi

Rising Media Use by Travelers 2014 - 2022

2015



— Mobile phones

2016

- UGC

2017

Social Media

2019

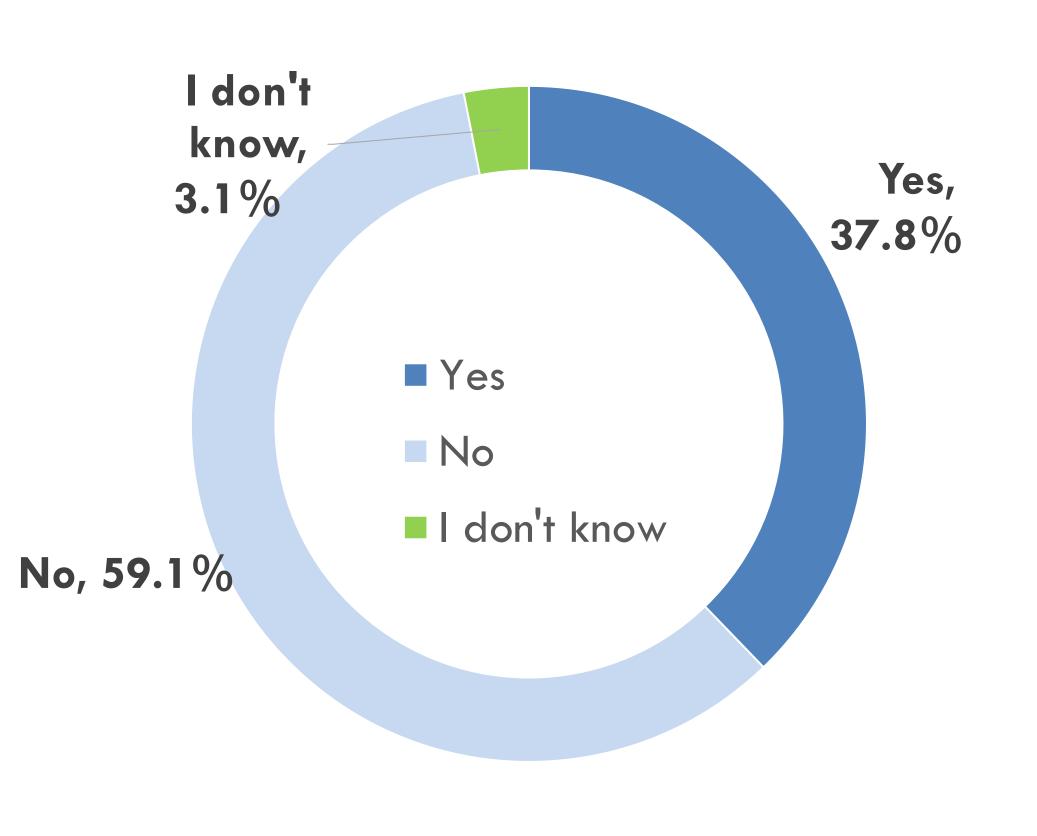
2018

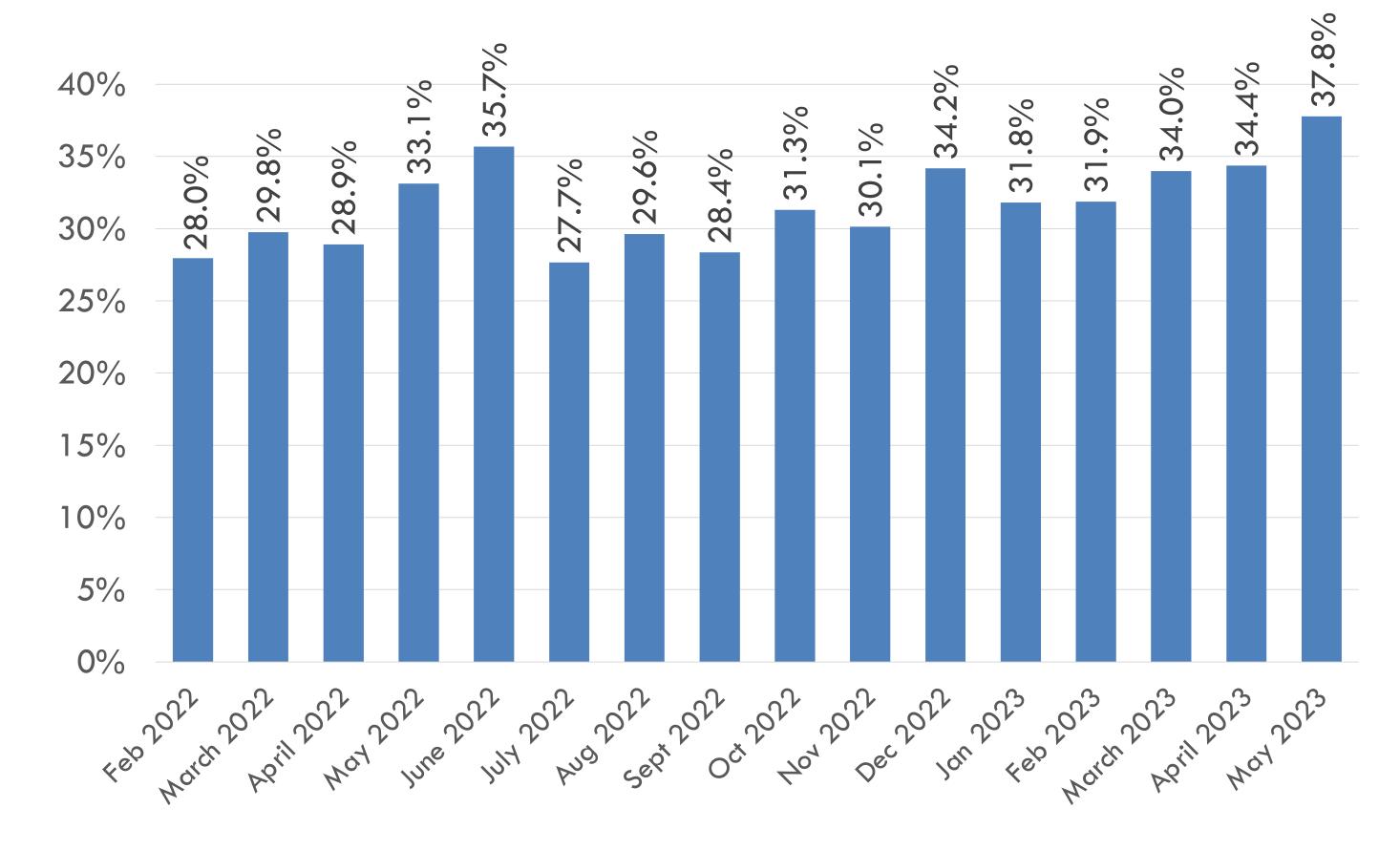
Video in Travel Planning



USE OF VIDEO TO PLAN TRAVEL

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?







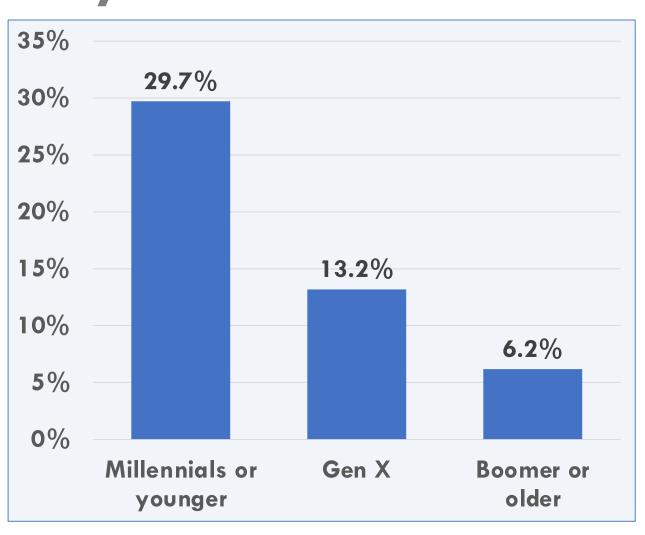
VIDEO: FREQUENCY OF USE

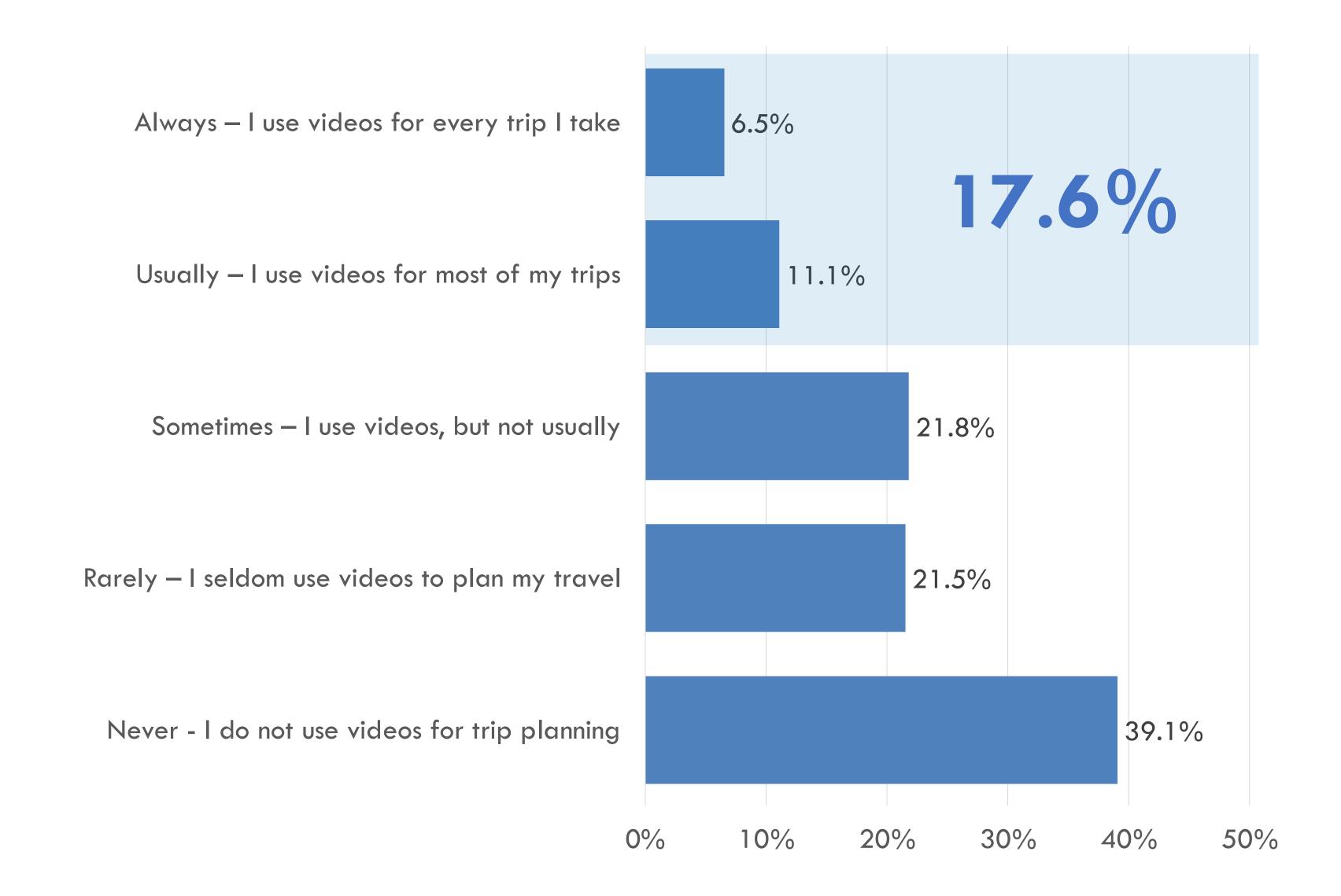
Question: How often do you use

ONLINE VIDEOS to plan your

travel?

By Generation

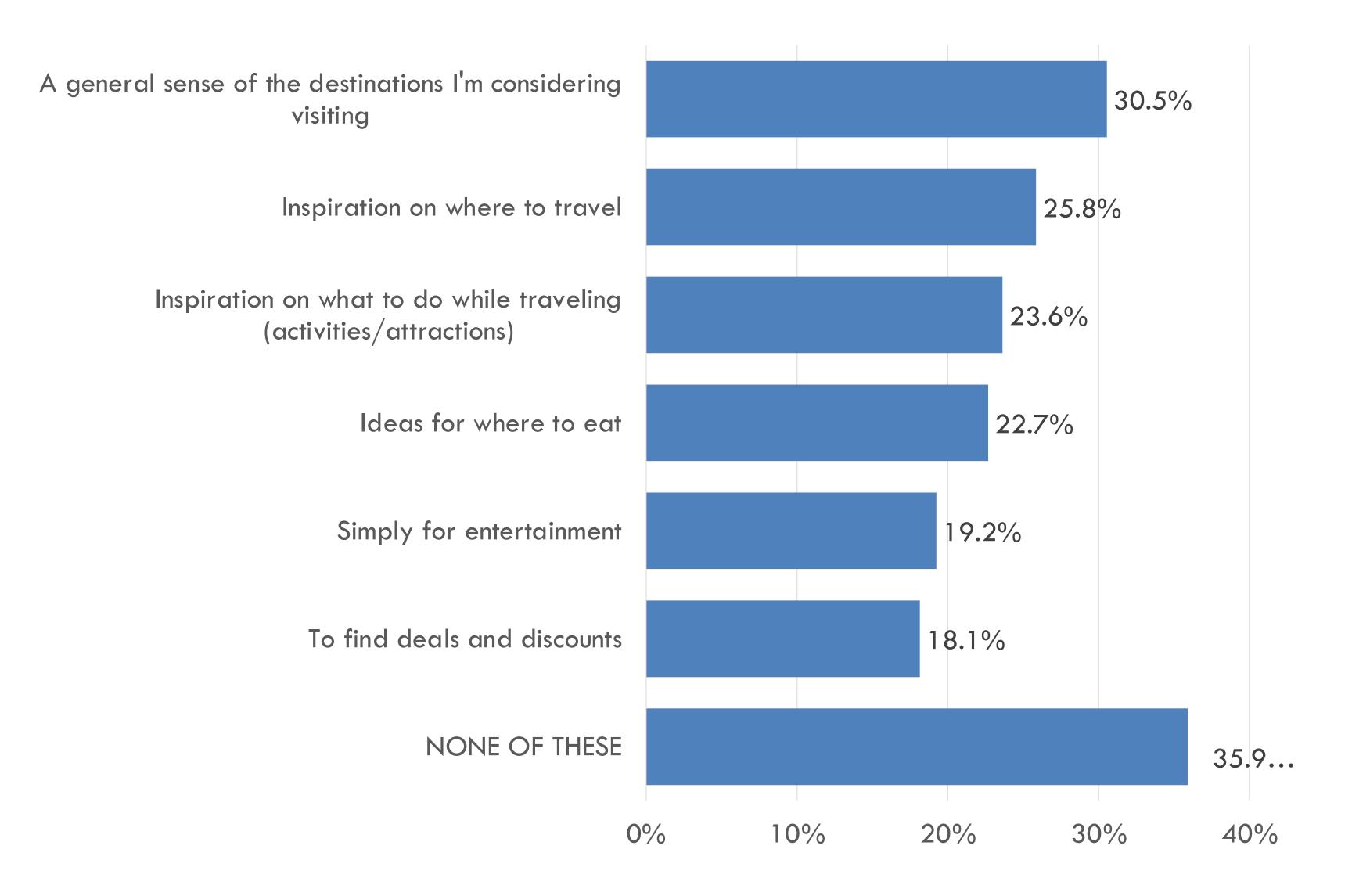






TYPICAL USAGE OF VIDEO

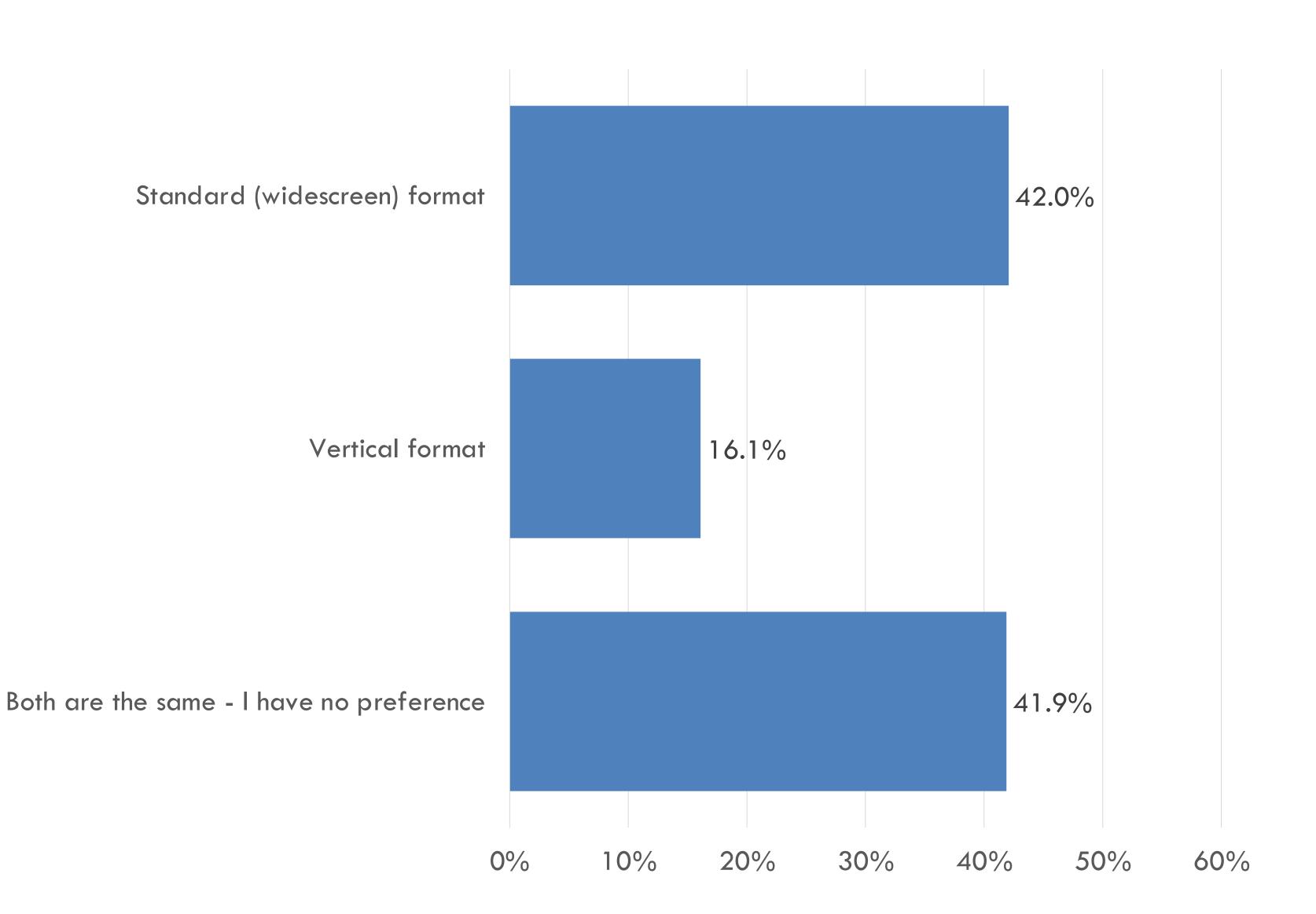
Question: How do you generally use online video for helping with your travels? (Select all that accurately complete the sentence)



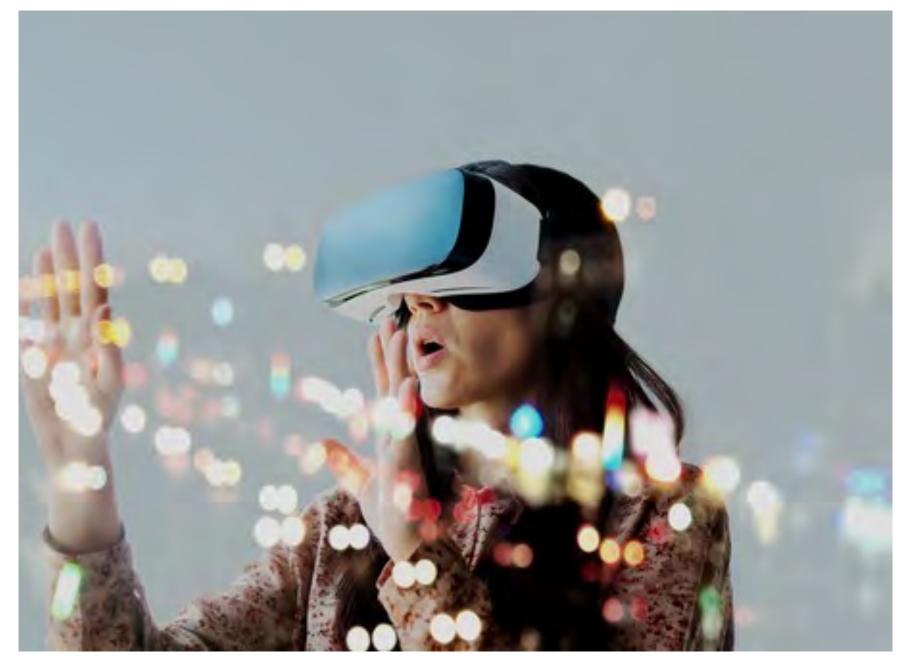


PREFERRED VIDEO FORMAT

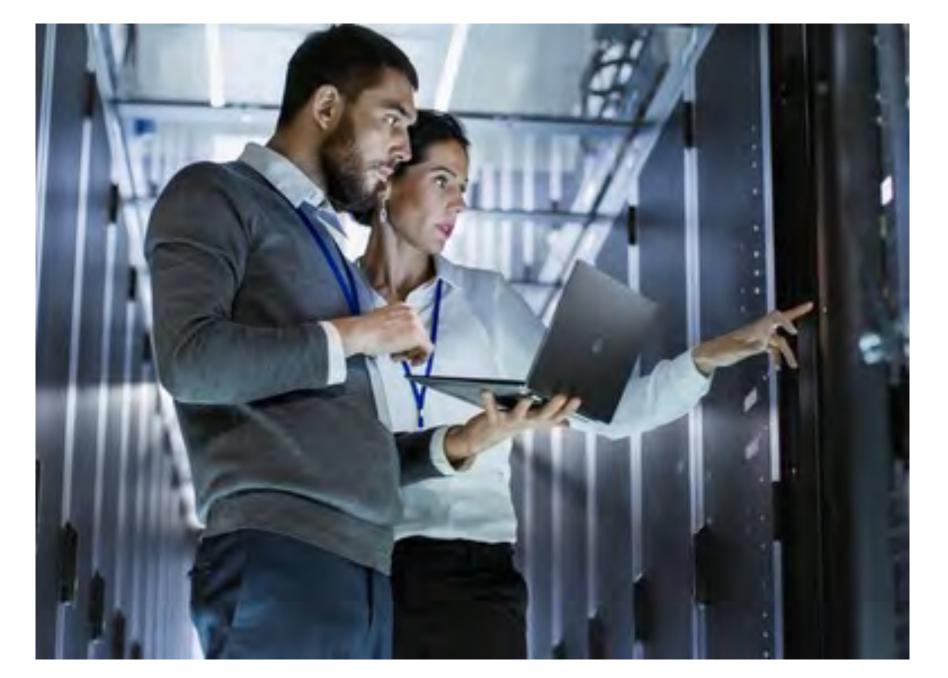
Question: When watching video online, do you generally prefer watching standard (widescreen) or vertical formats (like TikTok or YouTube Shorts)?











Video Use in Planning Their Most Recent Trip

USE OF SHORT-FORM VIDEO (BEFORE MOST RECENT TRIP)

Question: BEFORE

LEAVING YOUR HOME

on your most recent

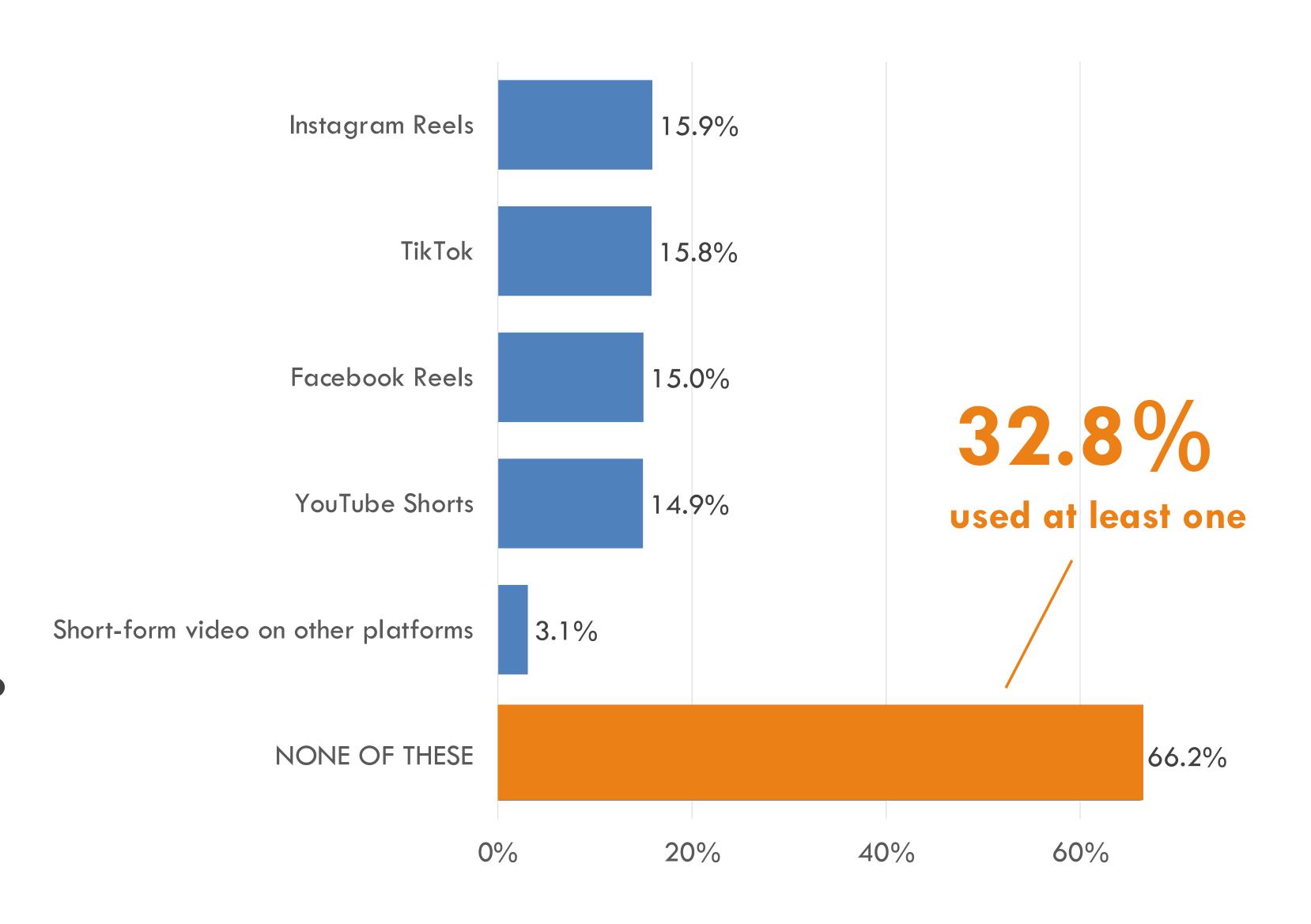
overnight trip, which of

the following (if any) did

you use to gather

inspiration or

information for your trip?





USE OF SHORT-FORM VIDEO (DURING MOST RECENT TRIP)

Question: AFTER

LEAVING HOME AND

ARRIVING IN YOUR

DESTINATION(S) did you

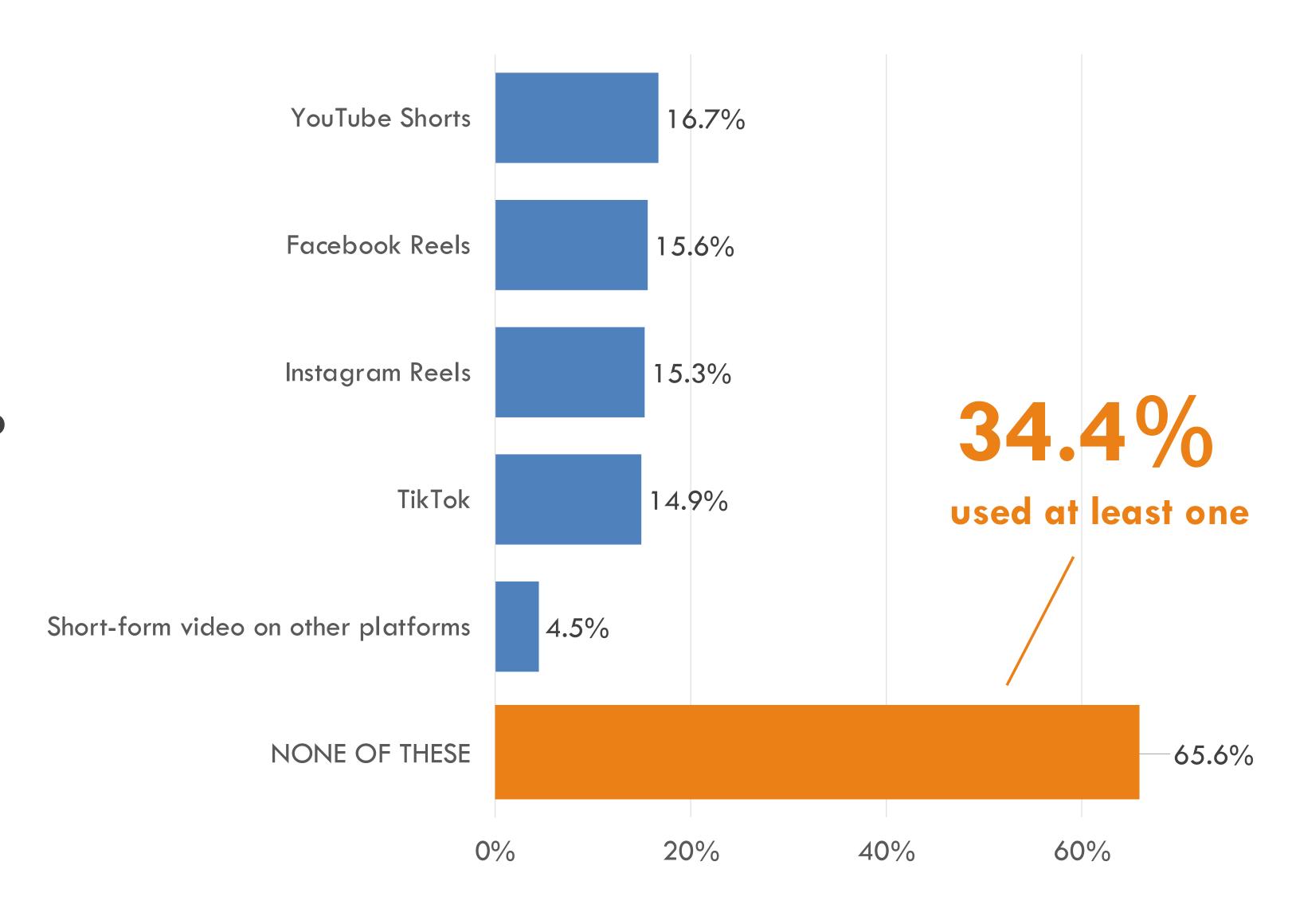
use any short-form video

(e.g. short videos on

TikTok, Facebook,

Instagram, etc.) to plan

your trip?





Destination Analysts

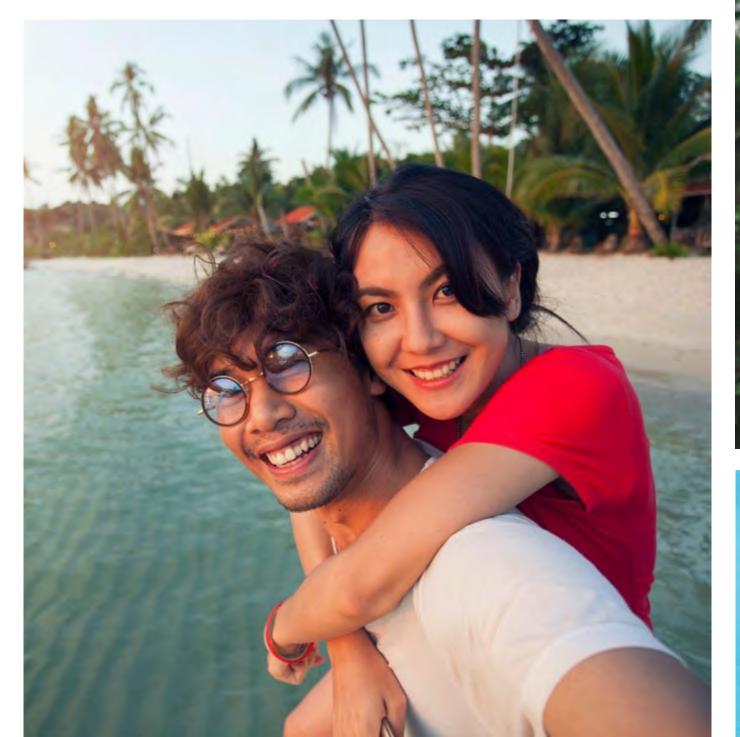
BEST PRACTICES IN TIKTOK CONTENT FOR TRAVEL BRANDS

2023



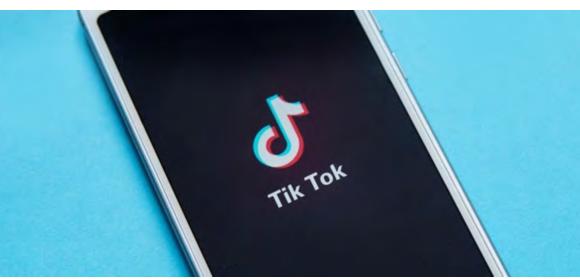




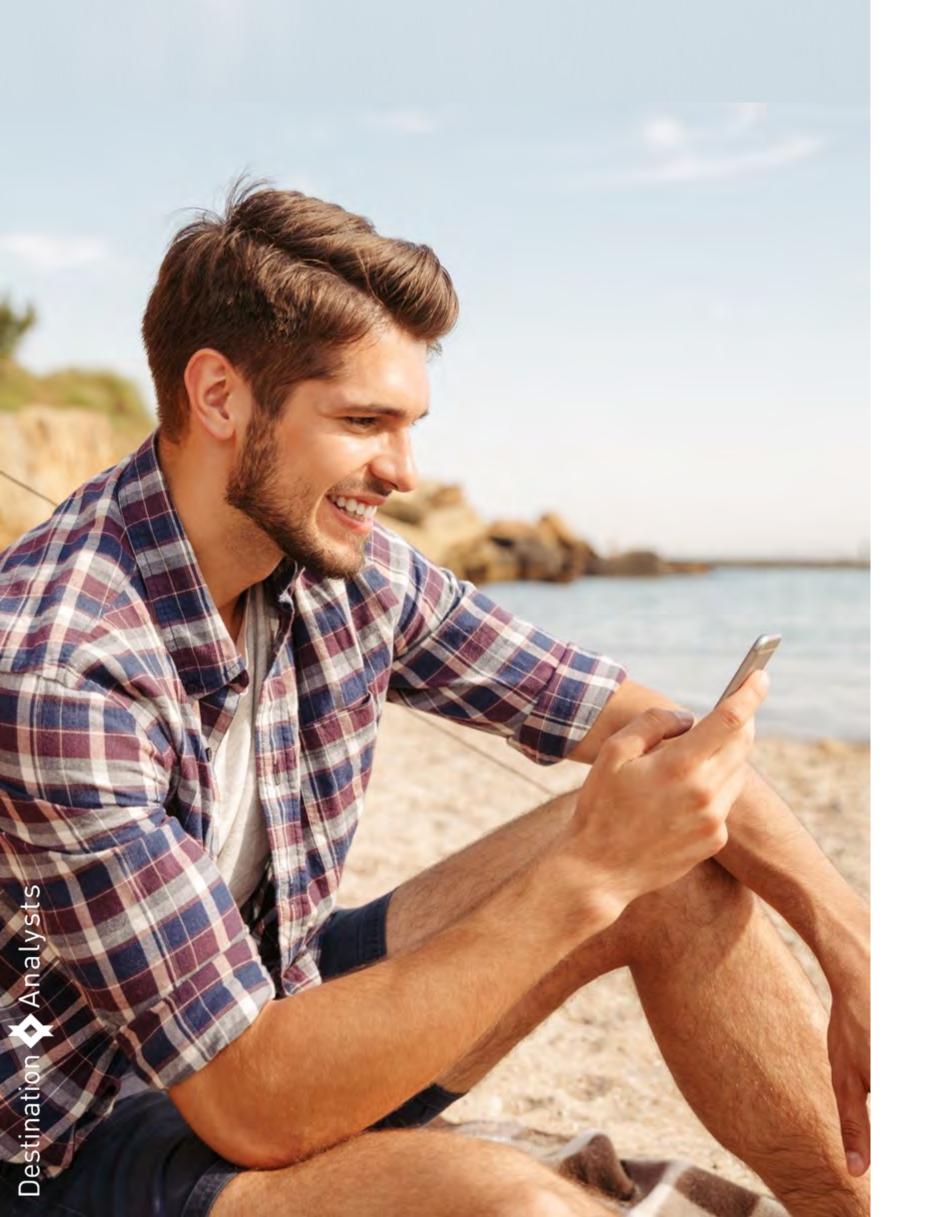




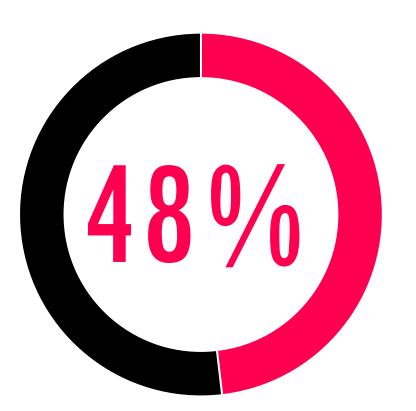




KEY TAKEAWAYS



It's Not Just Passive Entertainment. TikTok has Been Effective in Influencing Travelers to Take Trips.



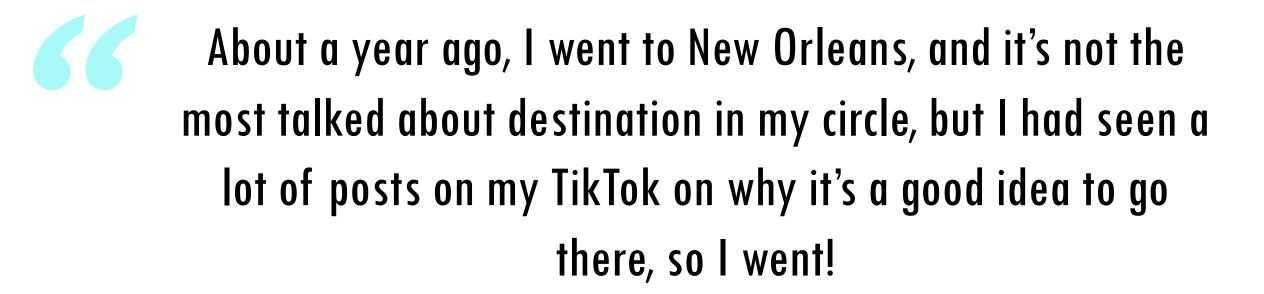
Almost half (48.1%) of TikTok using travelers report that they have taken a trip to a destination because of content they saw on the platform.

(65.0% for Millennials and 55.4% for Gen Z vs. 44.0% for Gen X and 28.4% for Baby Boomer TikTok users).



TikTok has reignited my travel desires.





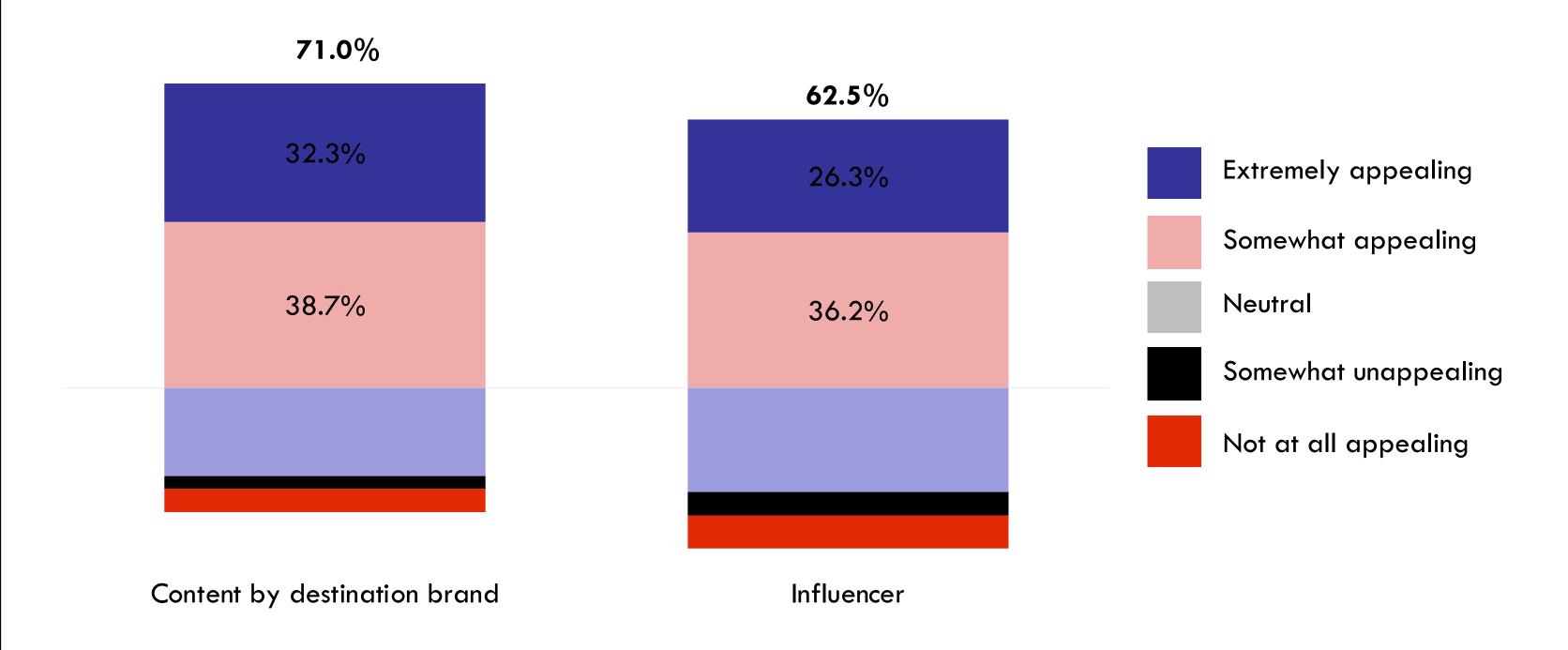


"I would trust it. Not saying implicitly, but travel content is usually trustworthy. Content made by brands or sponsors feels more trustworthy because someone is putting their name on the line."

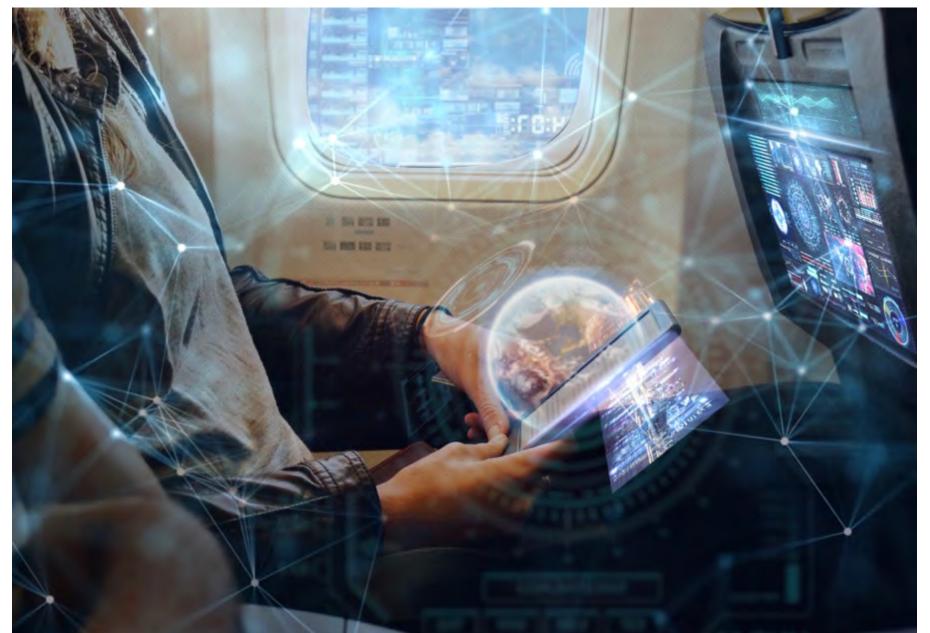
KEY TAKEAWAYS

When it Comes to Travel Content on TikTok, Users Consider Destination Brands to be More Appealing than Influencer Posts.

Appeal of TikTok Travel Content by Source









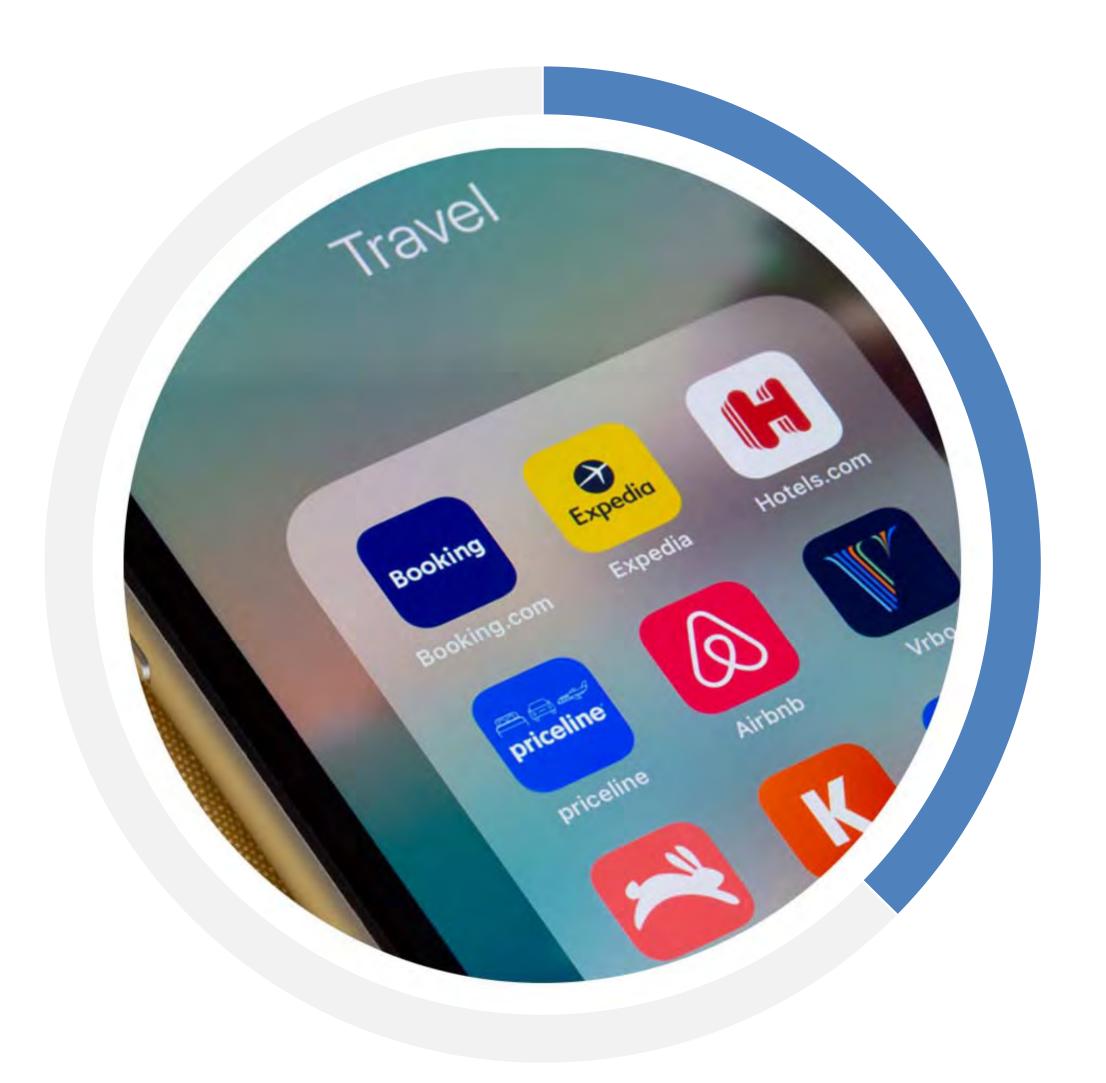
Technology Usage and Interest

TRAVEL-RELATED APPS

27.89%

(38% in 2019)

of travelers say they've used a travel-related APP in the past 12 months



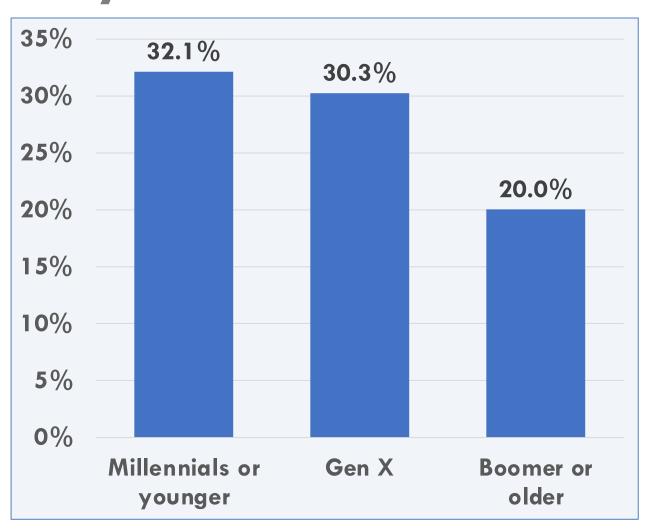


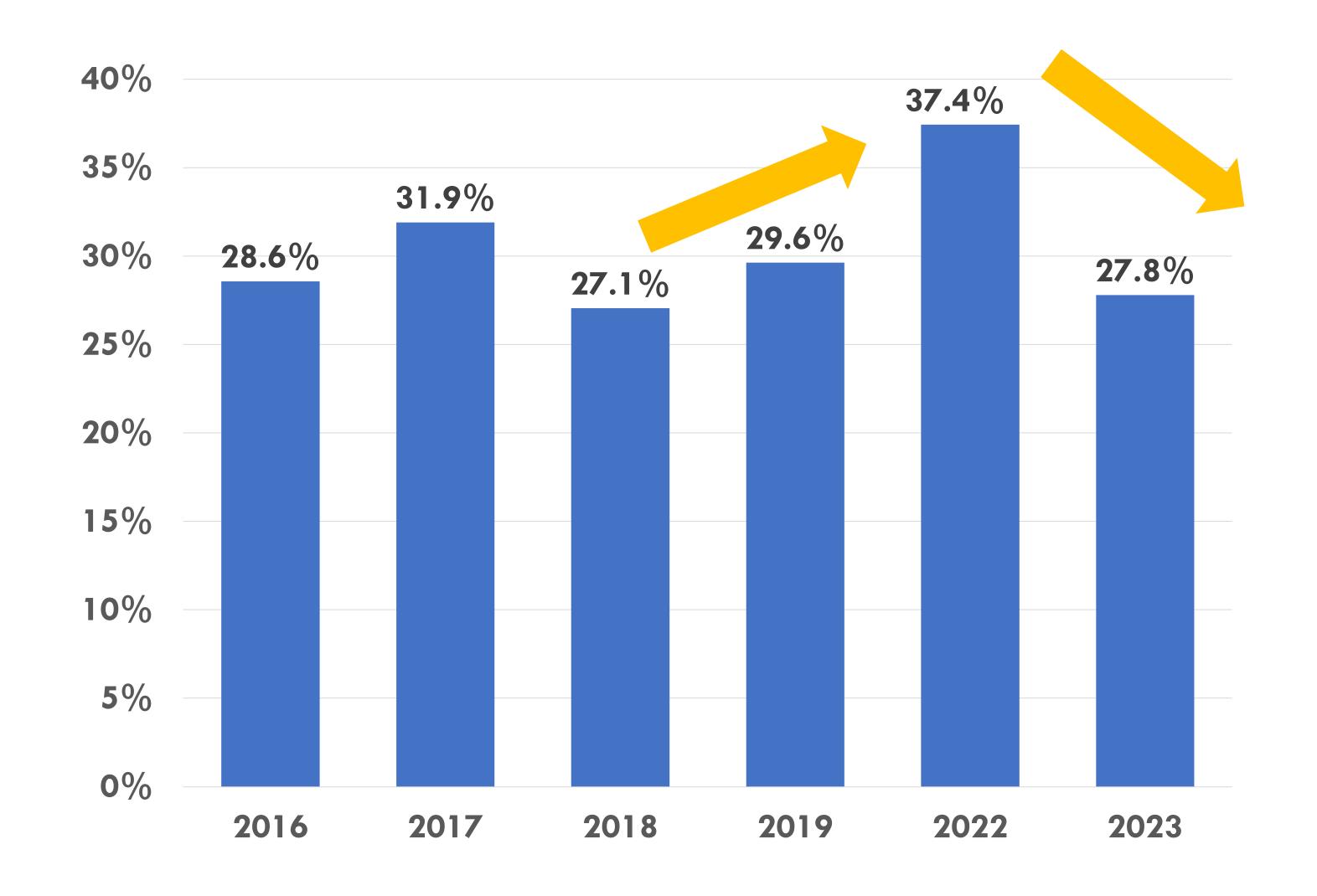
USE OF TRAVEL-RELATED APPS

Question: In the PAST TWELVE (12)

MONTHS have you used any travel-related APPs to help you in travel planning?

By Generation

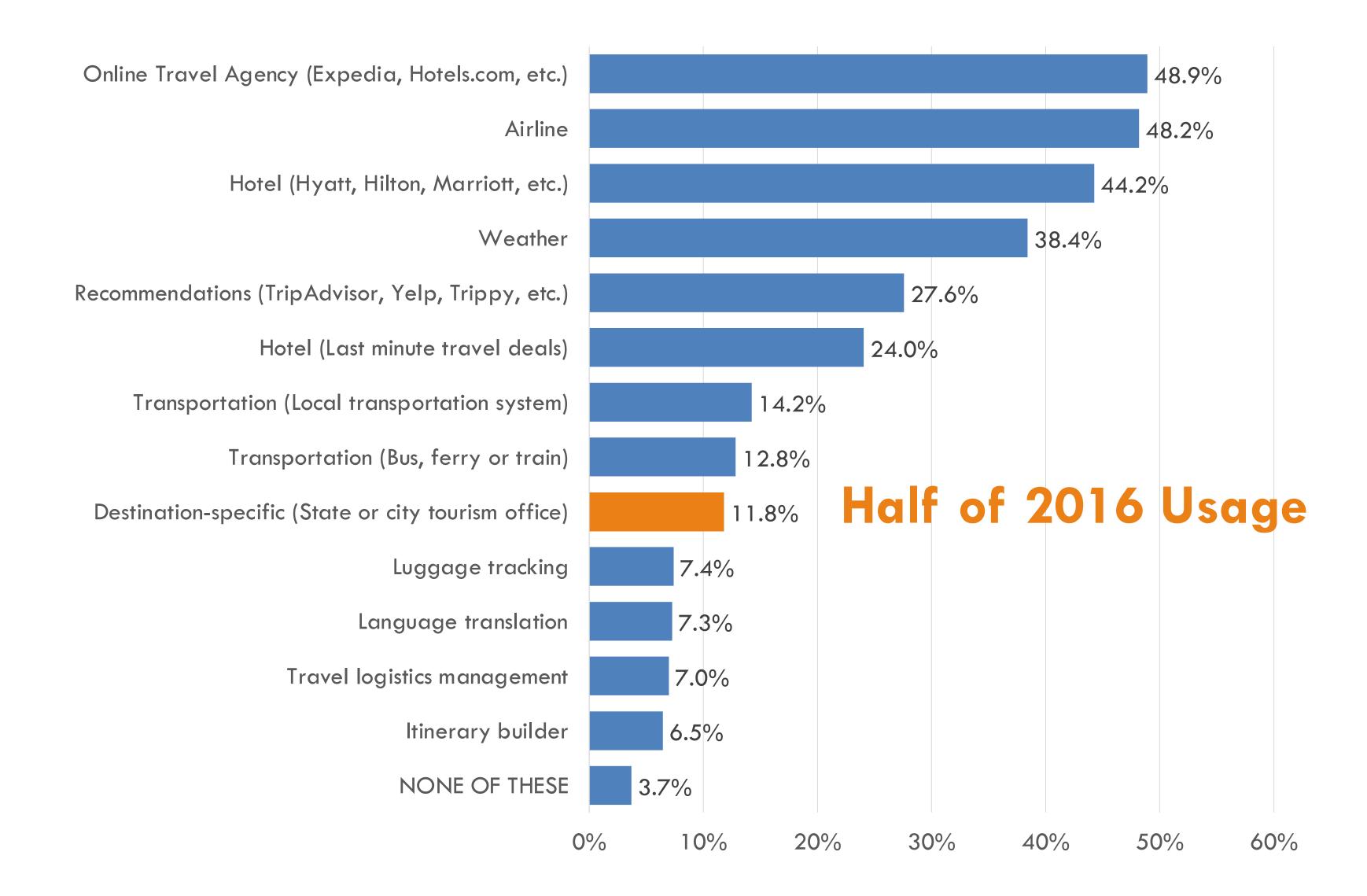






SPECIFIC TYPES OF TRAVEL-RELATED APPS USED

Question: In the PAST TWELVE (12)
MONTHS, which of these types of
APPs have you used for travel
planning? (Select all that you've
used)





VIRTUAL REALITY HEADSETS

7.40/0

of travelers say they have access

to a virtual reality headset.

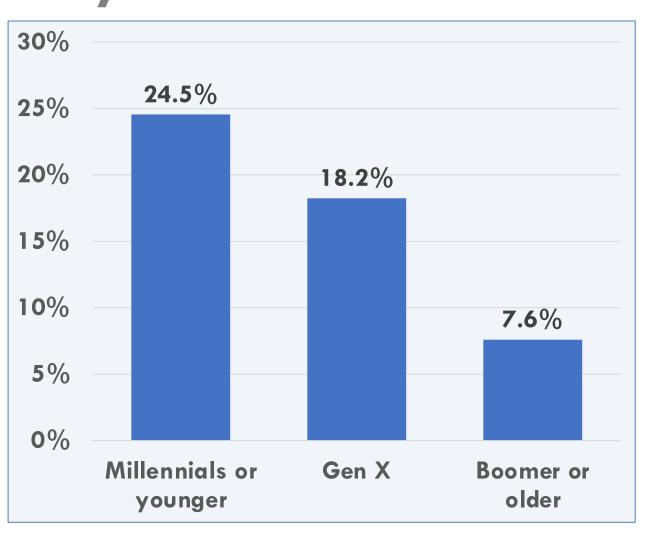


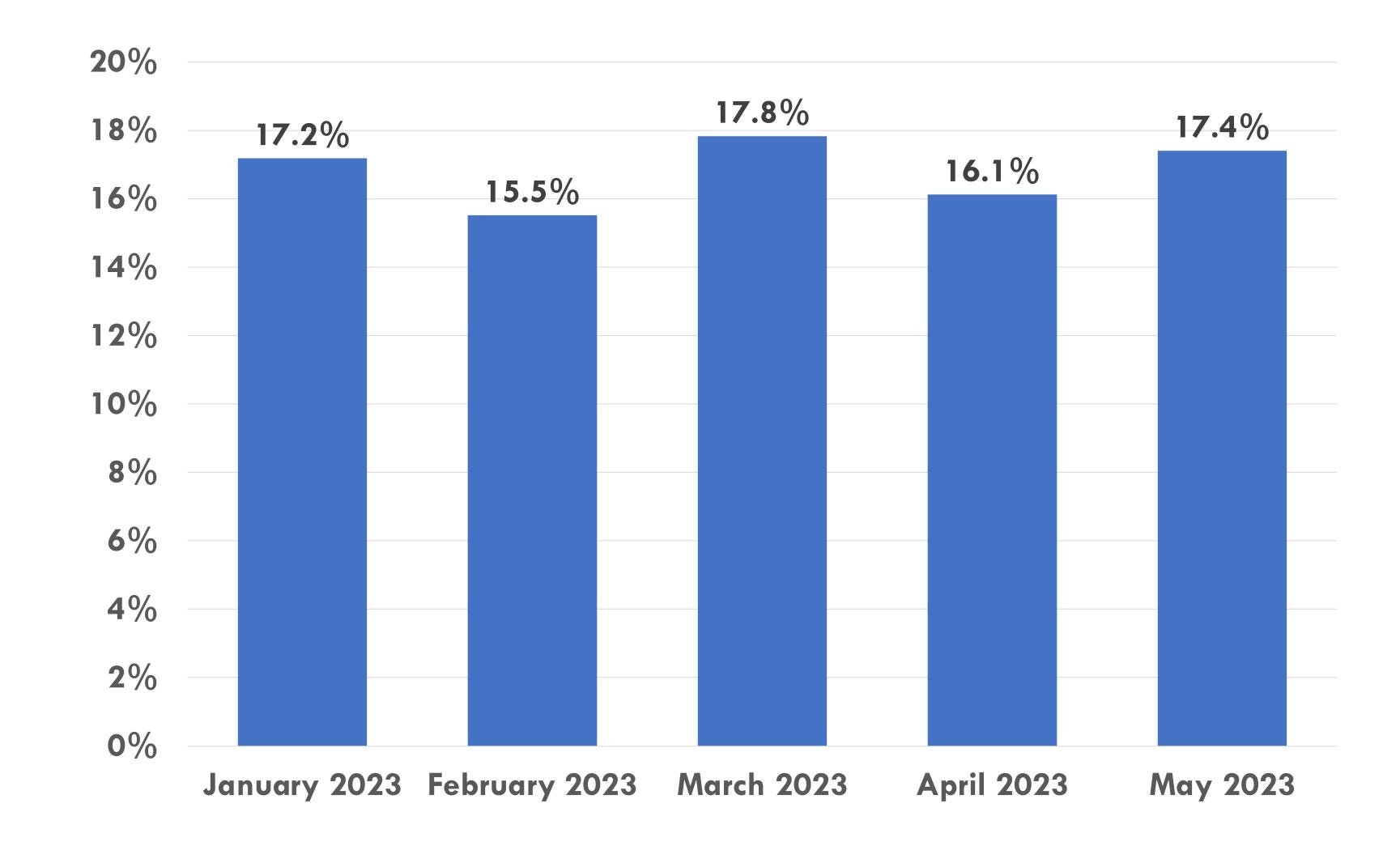


USE OF VIRTUAL REALITY HEADSETS

Question: Do you currently own (or have access to use) a virtual reality headset?

By Generation





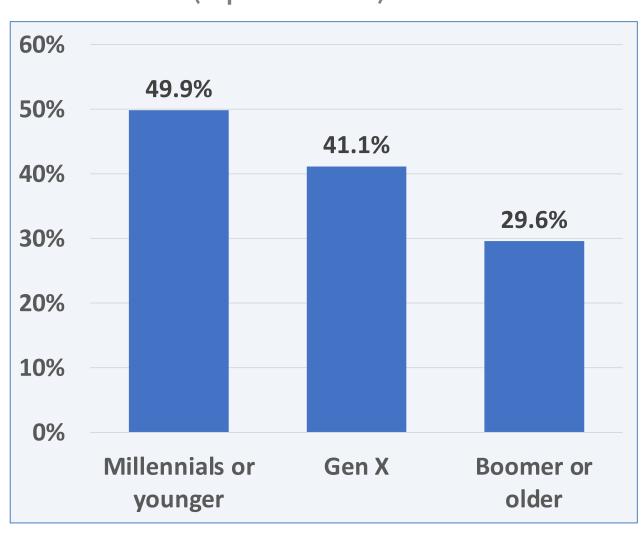


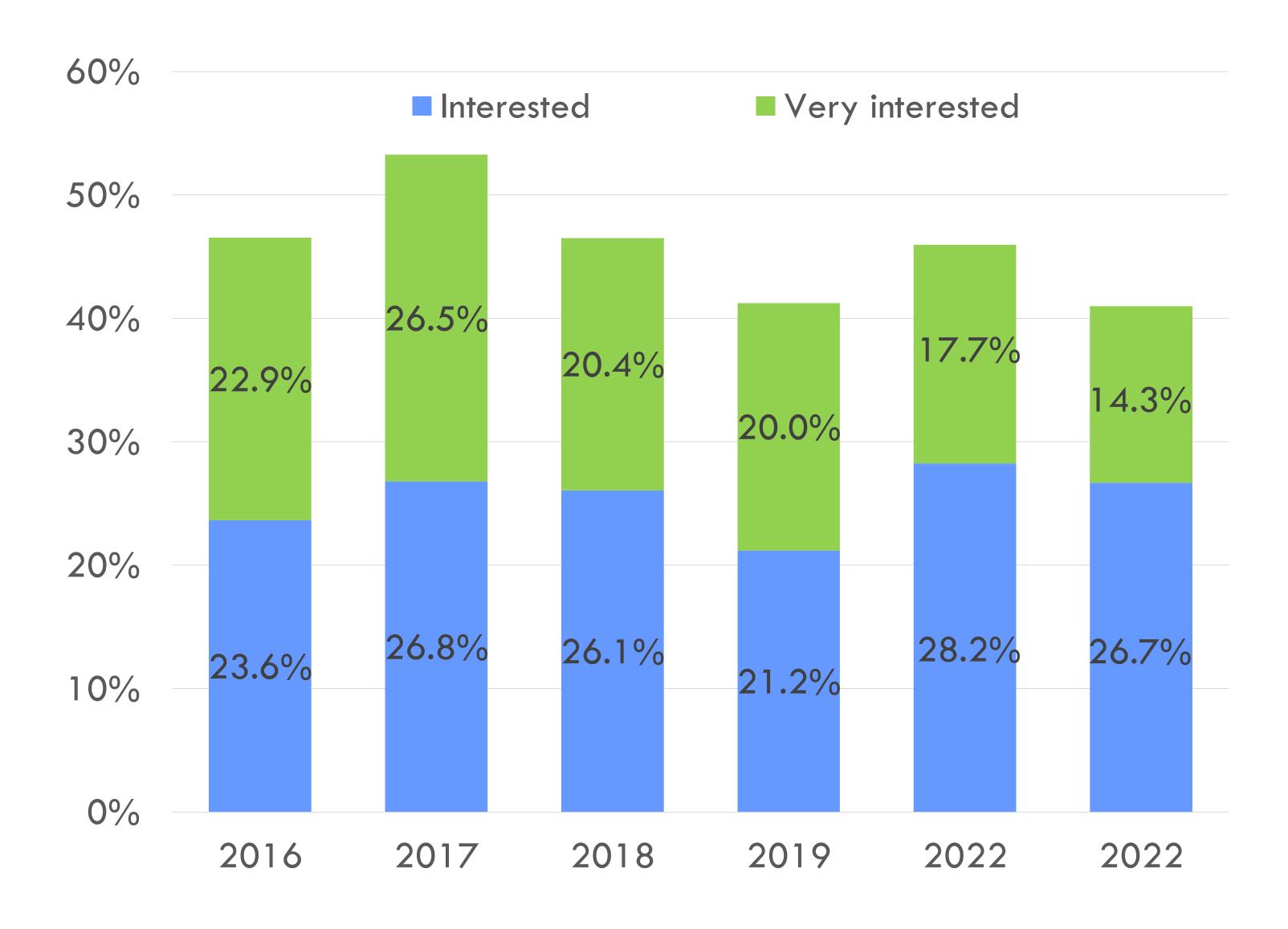
USE OF VIRTUAL REALITY HEADSETS

Question: If good contents were available, how interested would you be in using a Virtual Reality Headset to research leisure destinations you are considering visiting? (Select one)

By Generation

(Top 2 Box Score)

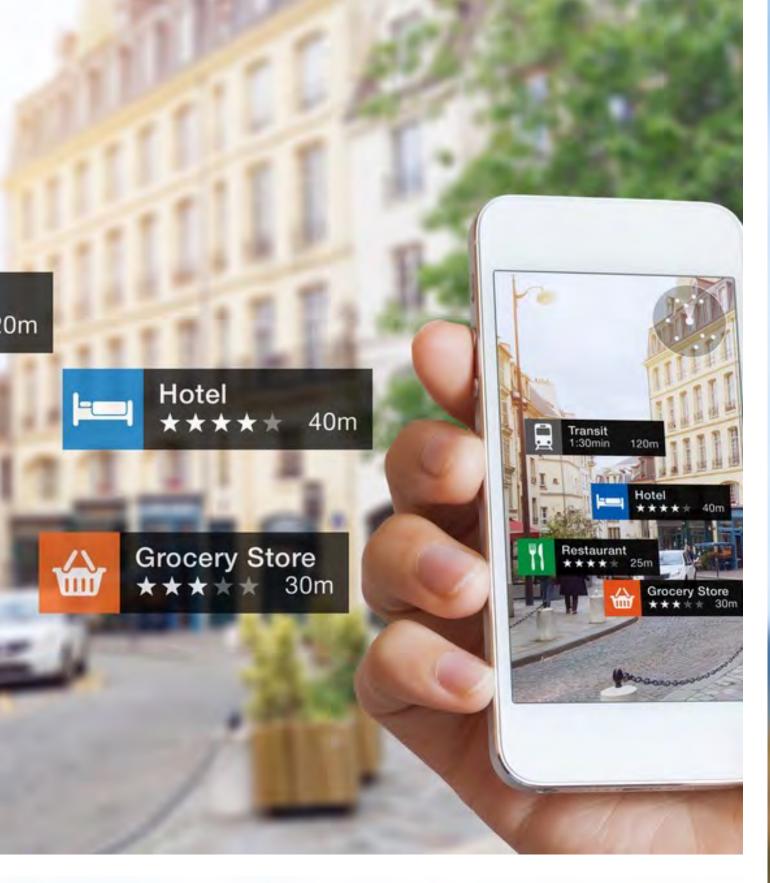




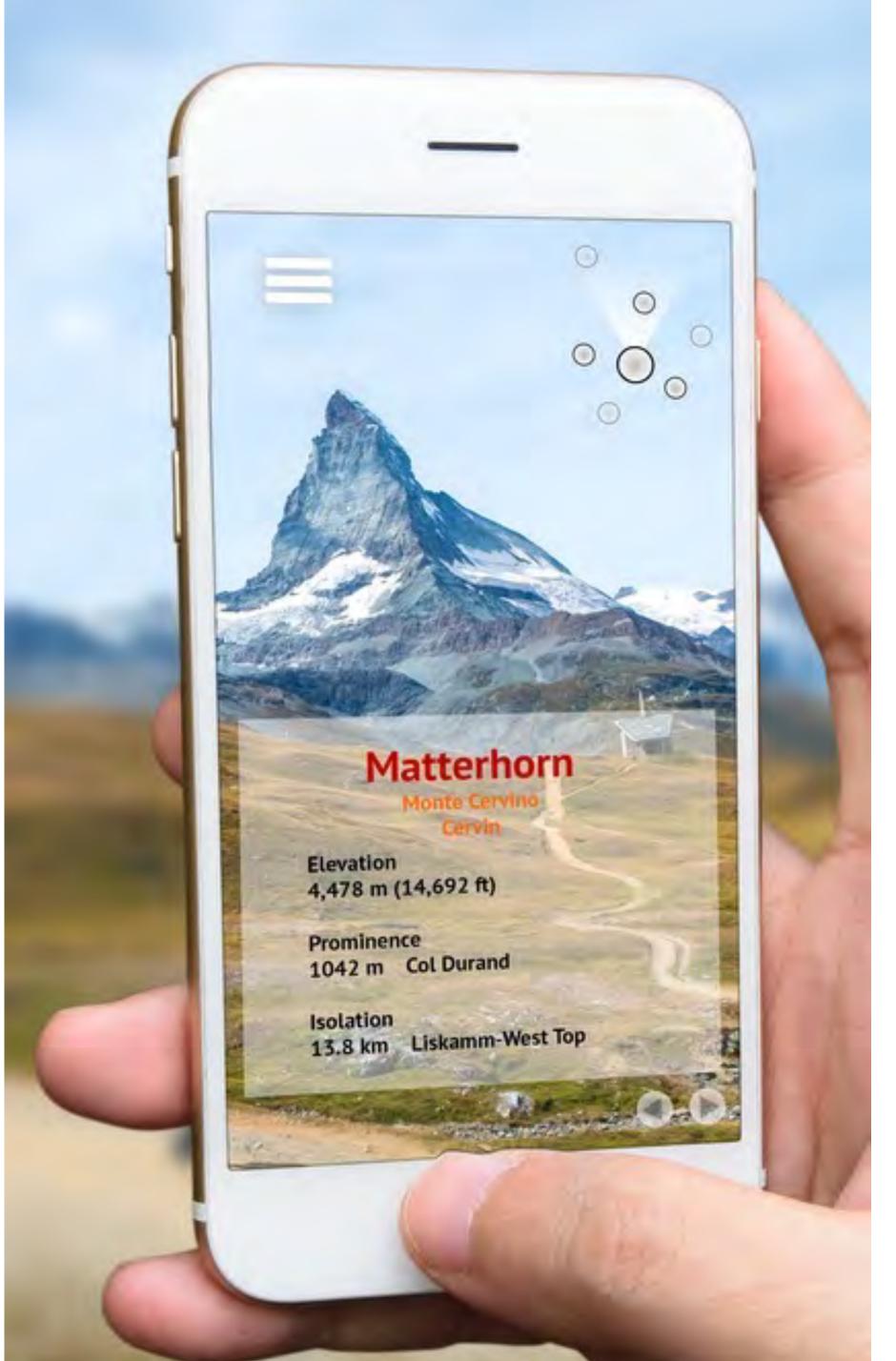








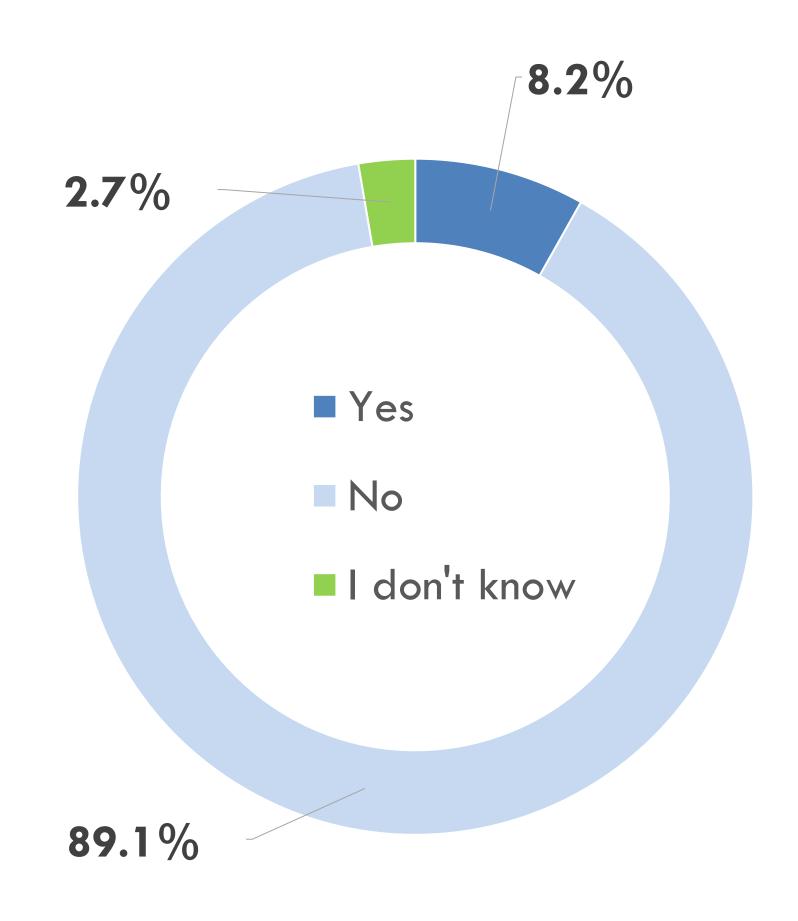




Augmented Reality

USE OF AUGMENTED REALITY TECHNOLOGY

Question: In the PAST 12 MONTHS,
have you viewed or used Augmented
Reality for any travel related
purpose?







THE METAVERSE

The metaverse is the emerging 3-Denabled digital space that uses virtual reality, augmented reality, and other advanced internet and semiconductor technology to allow people to have lifelike personal and business experiences online.



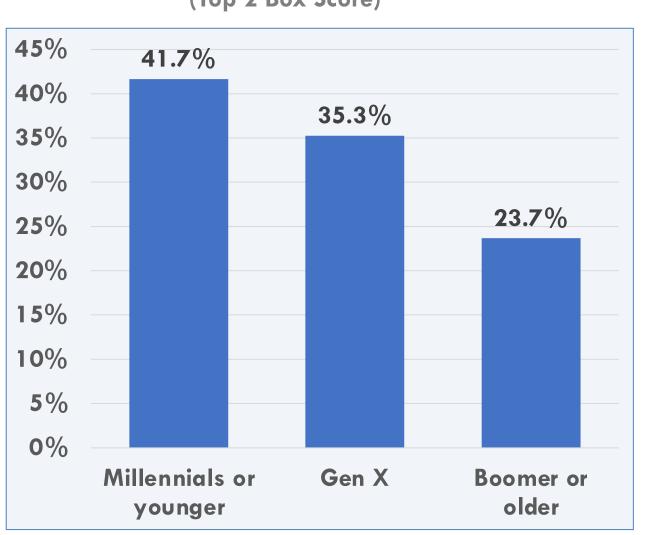


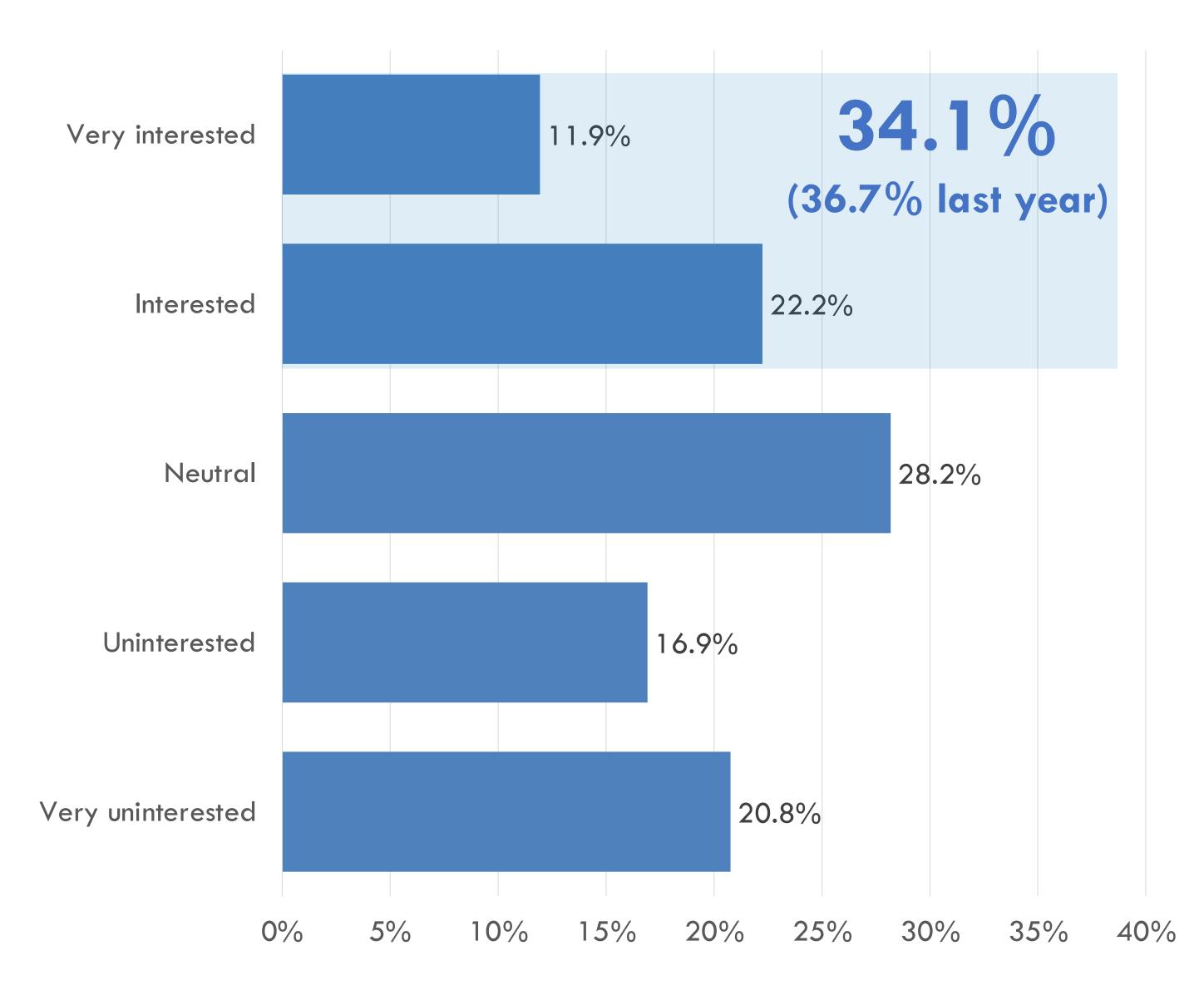
THE METAVERSE: INTEREST

Question: Assume the metaverse includes good spaces for virtually experiencing travel and destinations. How interested would you be in having experiences in the metaverse as a way to get travel inspiration or plan your trips? (Select one) by Report Banner

By Generation

(Top 2 Box Score)







(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)



AWARENESS OF AI CHATBOTS

74.0%

(28.1% in February)

of travelers say that (before taking this survey) they had heard of artificial intelligence chatbots like

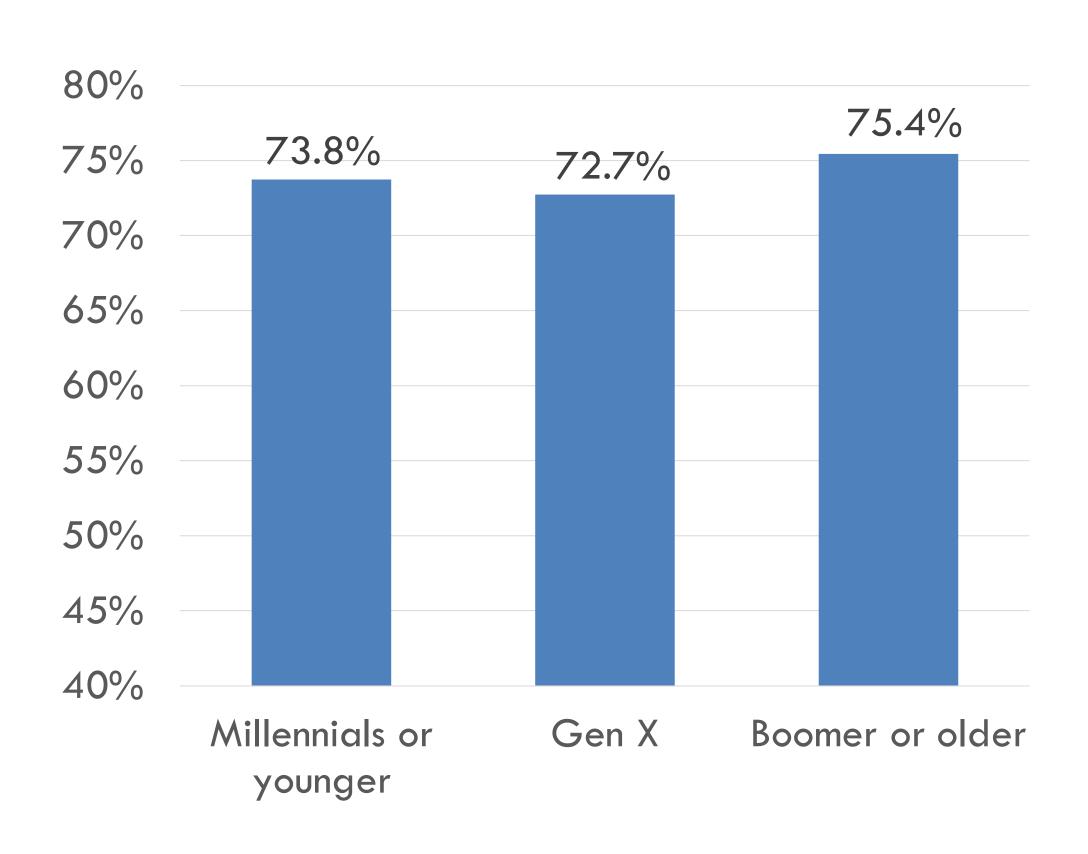
ChatGPT



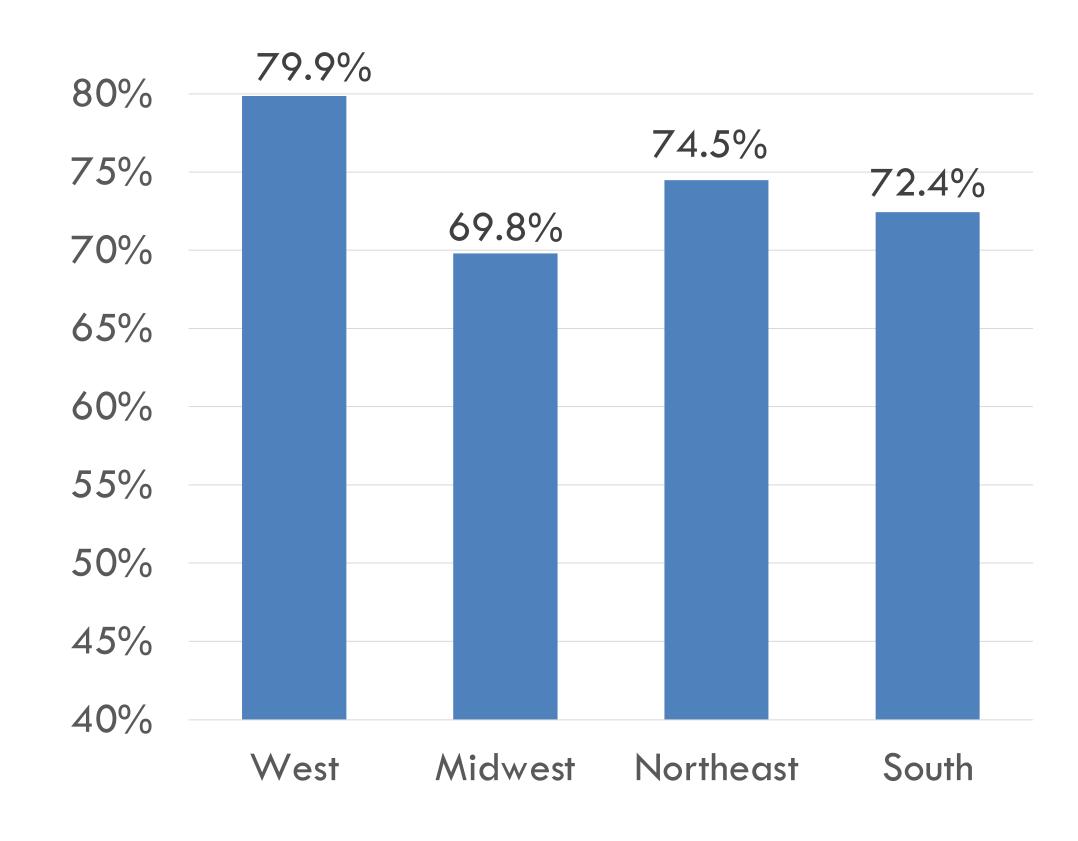


AWARENESS OF AI CHATBOTS

Generation



Region





USE OF AI CHATBOTS

27.4%

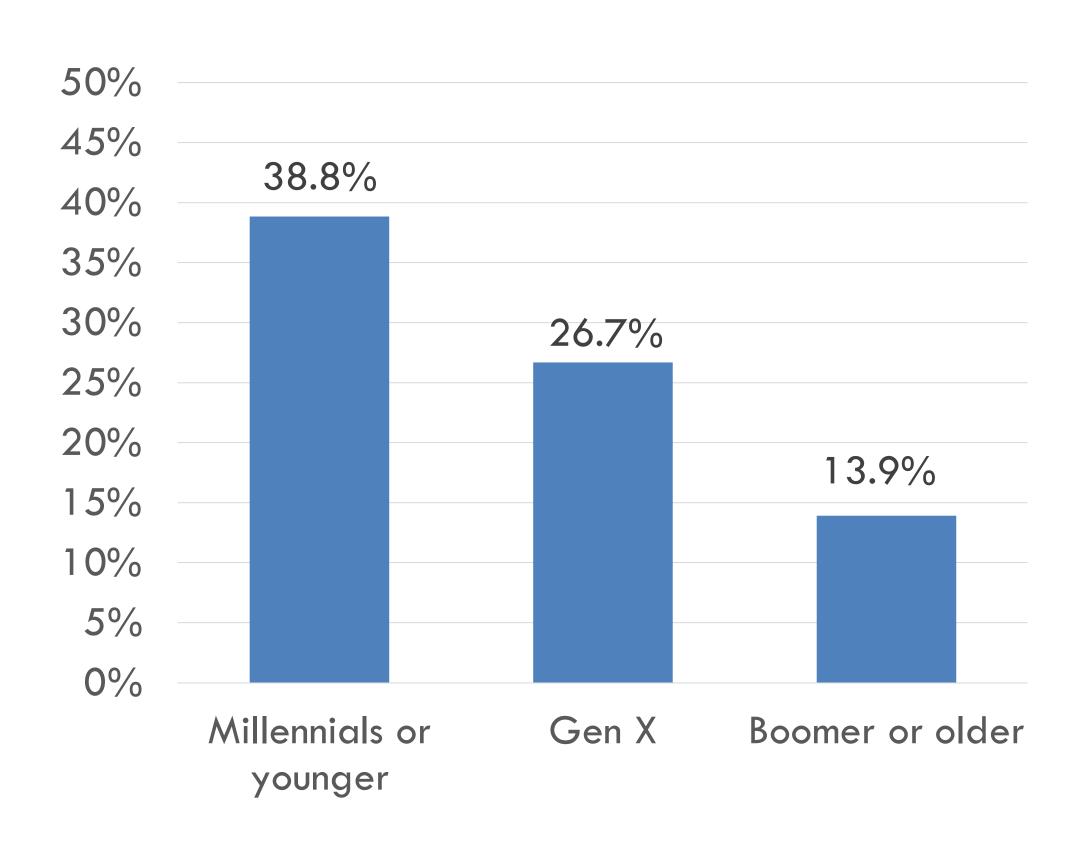
of travelers say they have used artificial intelligence chatbots like ChatGPT.



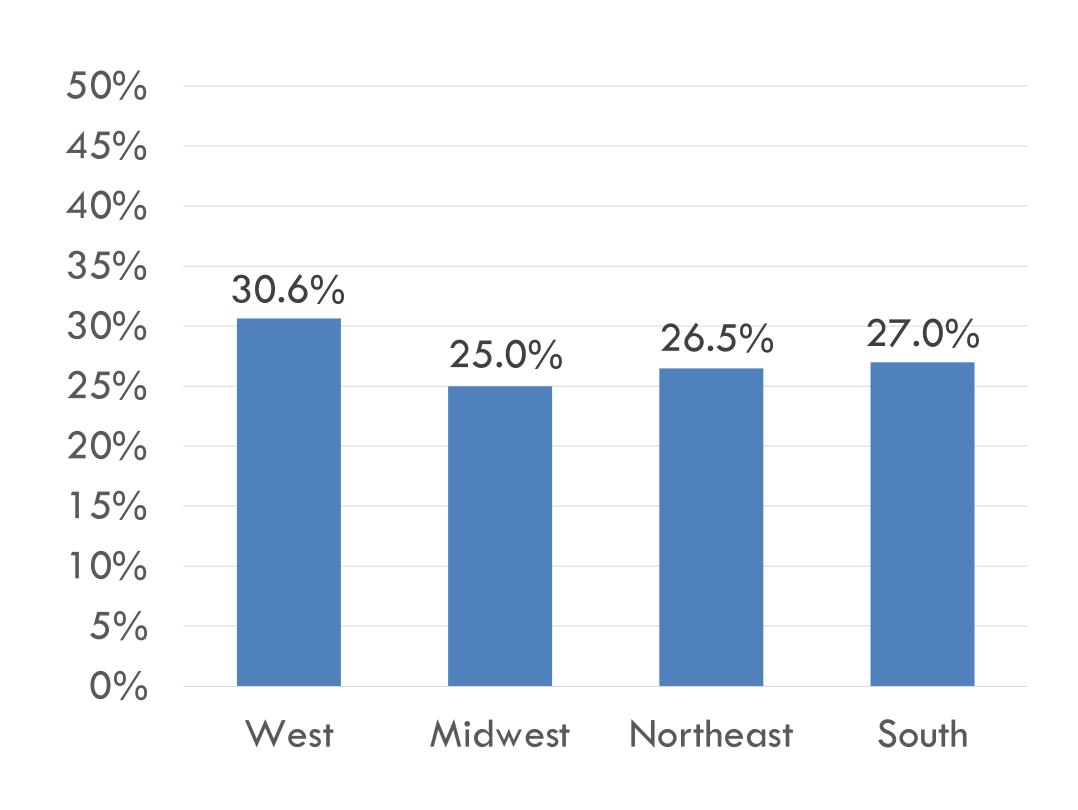


USE OF AI CHATBOTS (FOR ANY REASON)

Generation



Region





USE OF AI CHATBOTS FOR TRAVEL

7.40/0

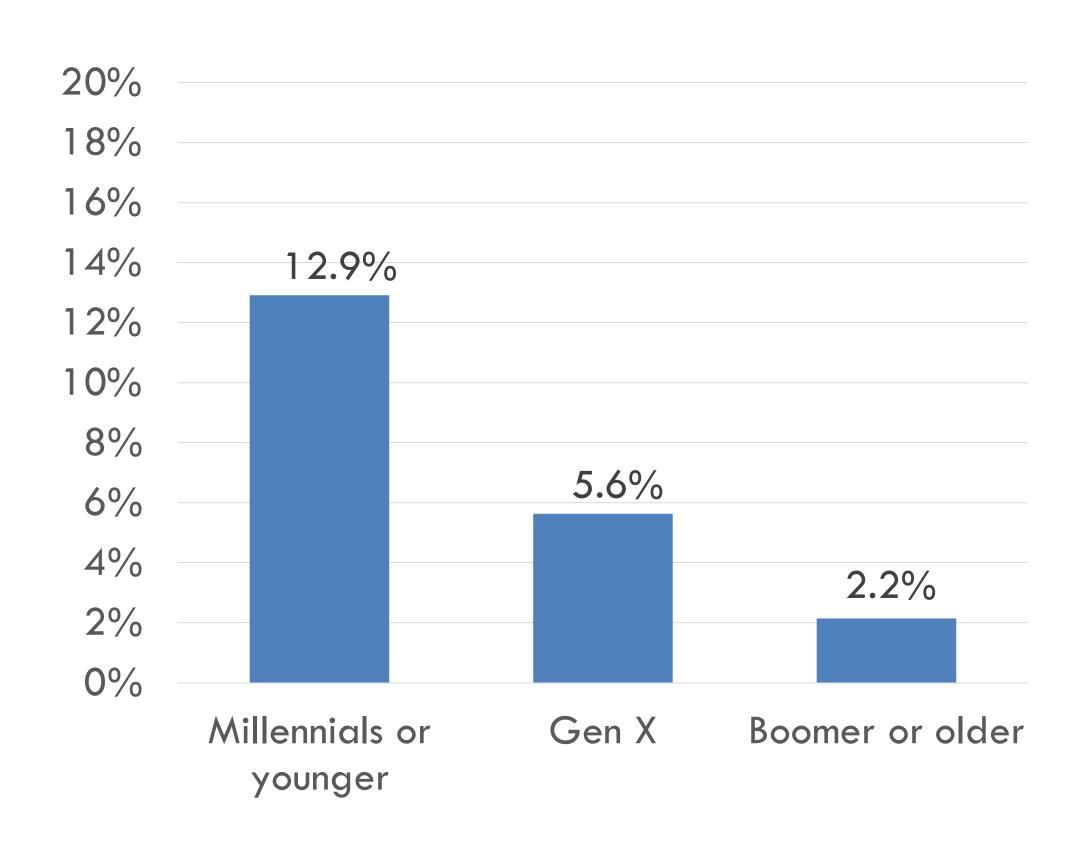
of travelers say they have used artificial intelligence chatbots like ChatGPT for travel inspiration or planning.



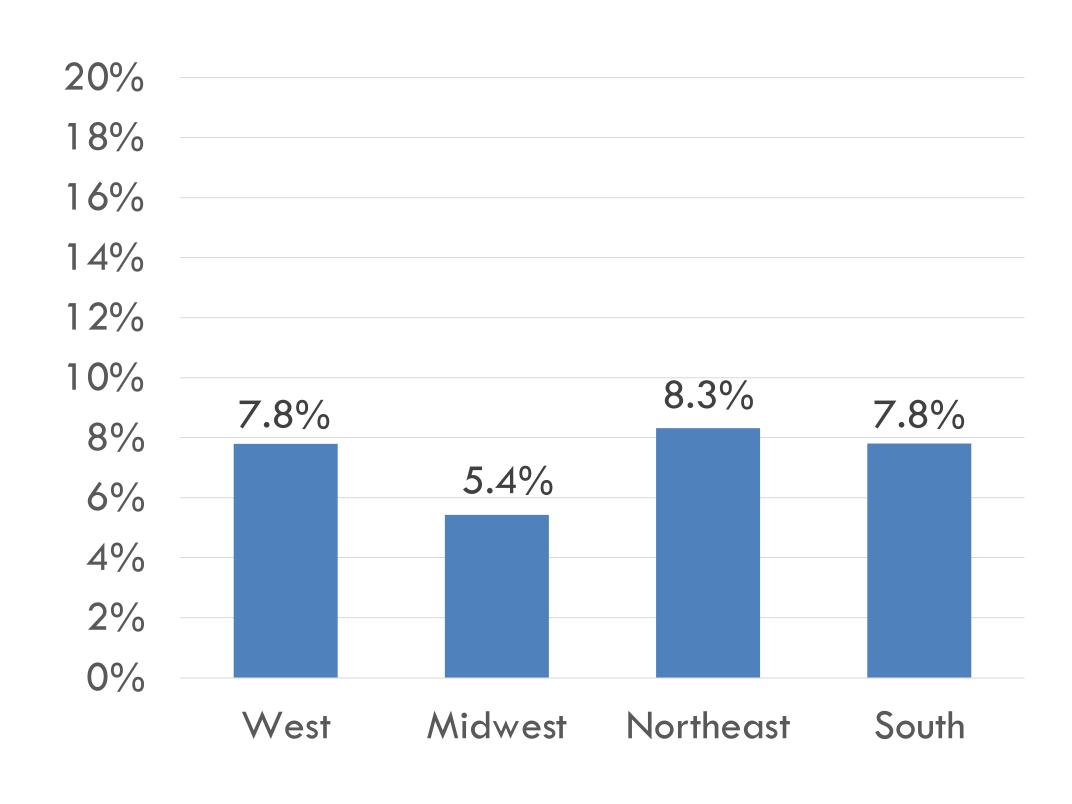


USE OF AI CHATBOTS (FOR TRAVEL)

Generation



Region



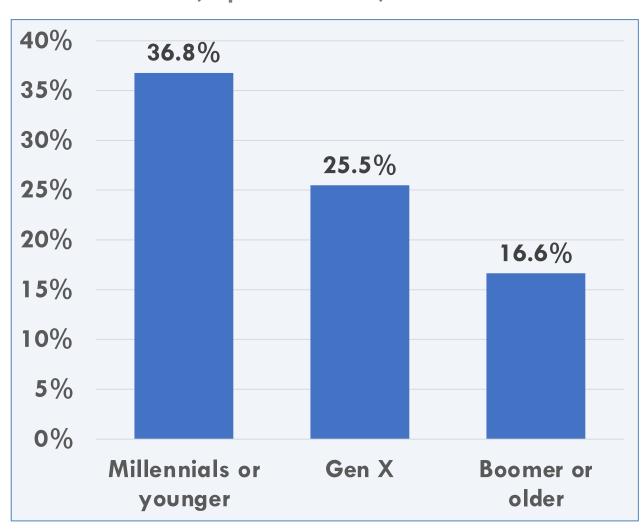


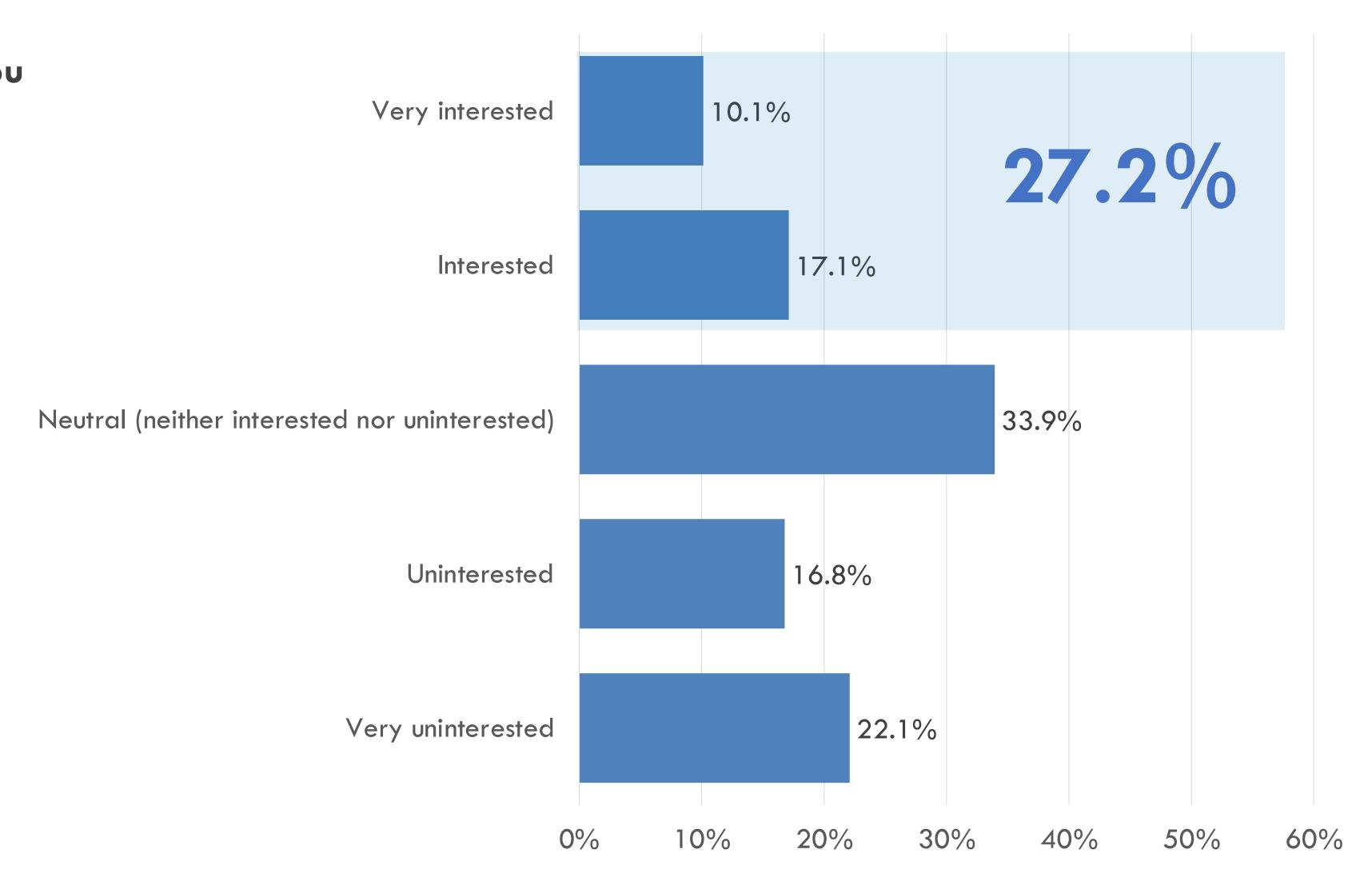
INTEREST IN USING AI CHATBOTS

Question: How interested would you in using Artificial Intelligence (AI) chatbots (like ChatGPT) for travel inspiration and/or trip planning?

By Generation

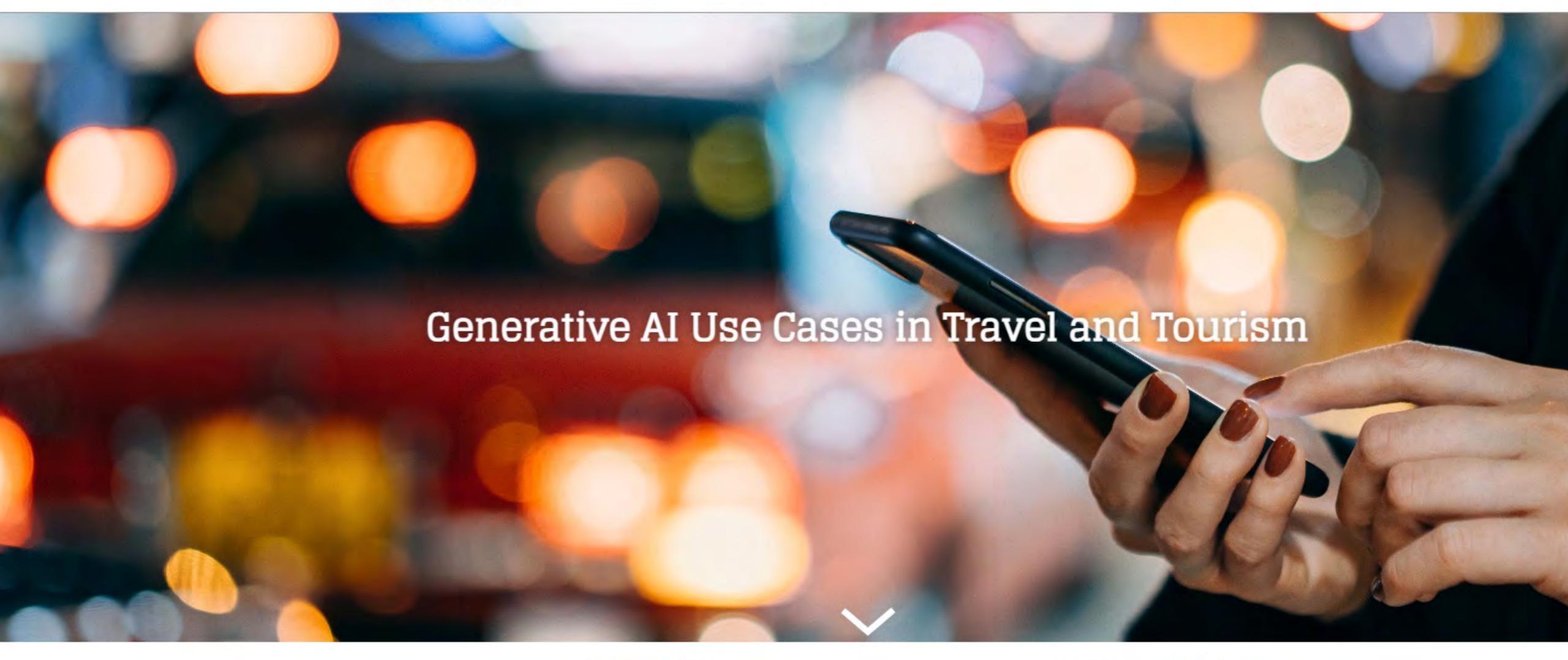
(Top 2 Box Score)











Published 5/8/23











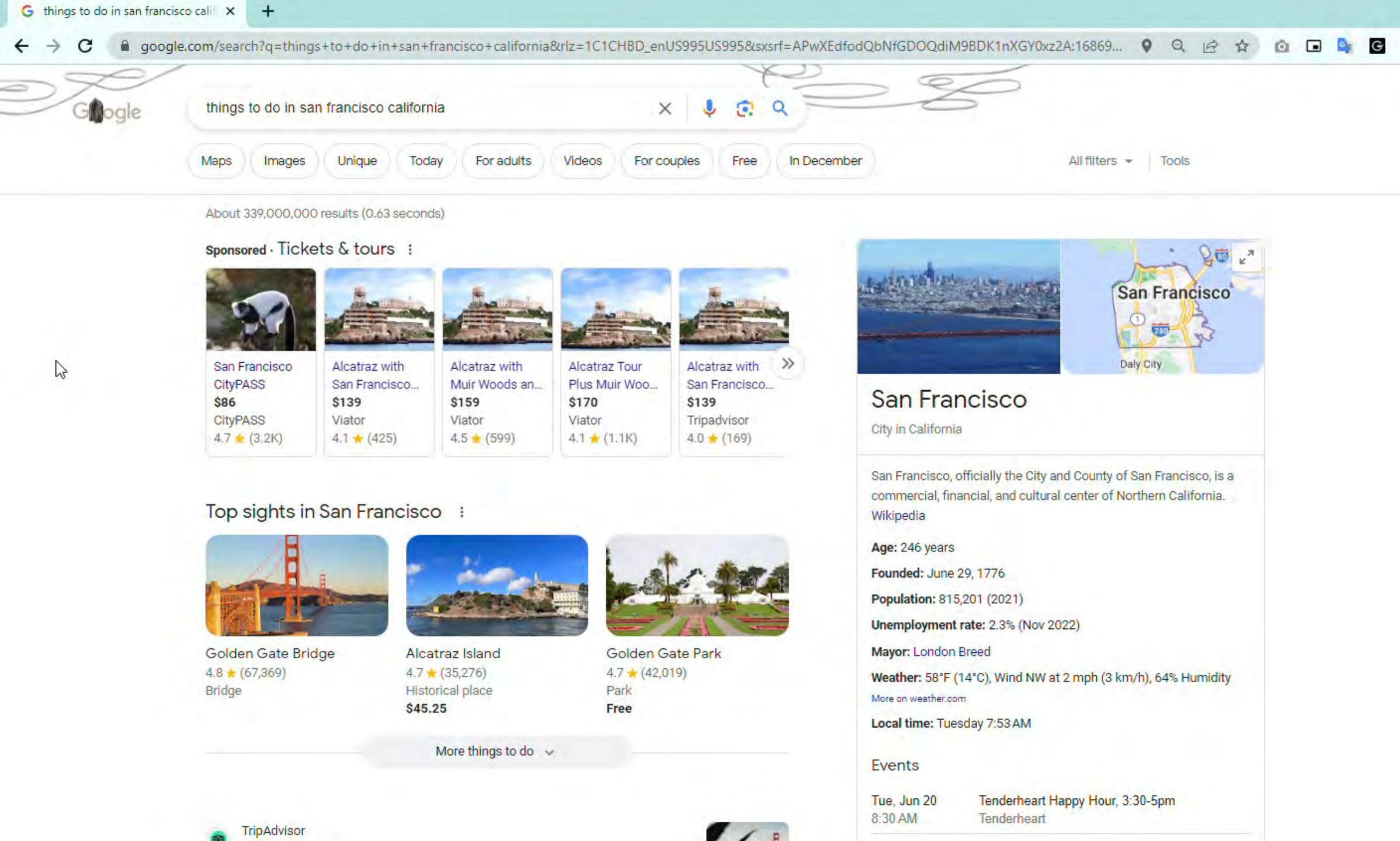


- » "Foundations and Principles of Generative AI" part one in a series on generative AI
- » "The Power of Generative AI & ChatGPT" webinar with Miles Partnership, Phocuswright and PhocusWire



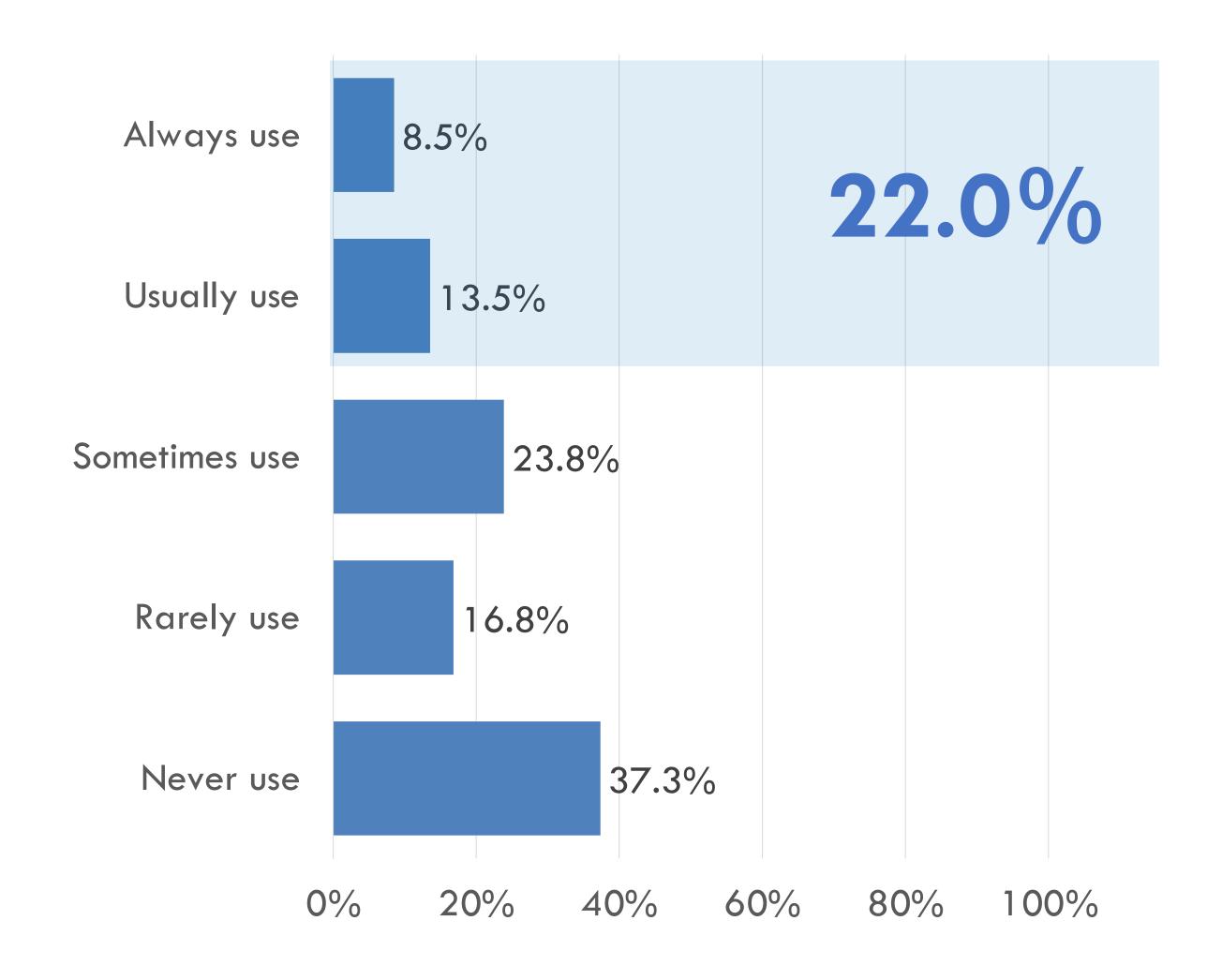


Google vs DMO Travel Content & Business Listings



FREQUENCY OF USE: GOOGLE-CURATED DESTINATION CONTENT

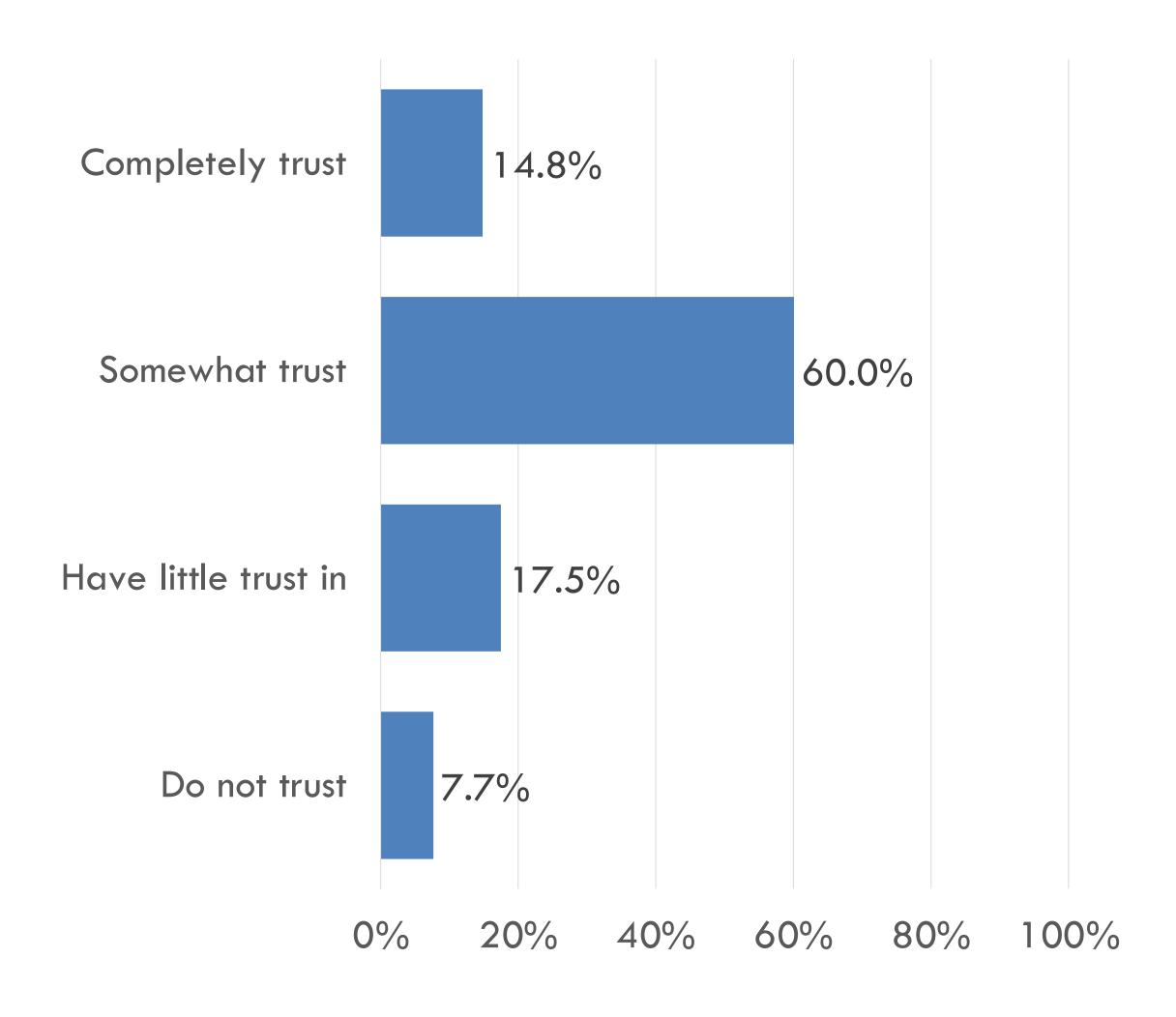
Question: How frequently do you use Google-curated destination content to plan your leisure trips?





TRUST: GOOGLE-CURATED DESTINATION CONTENT

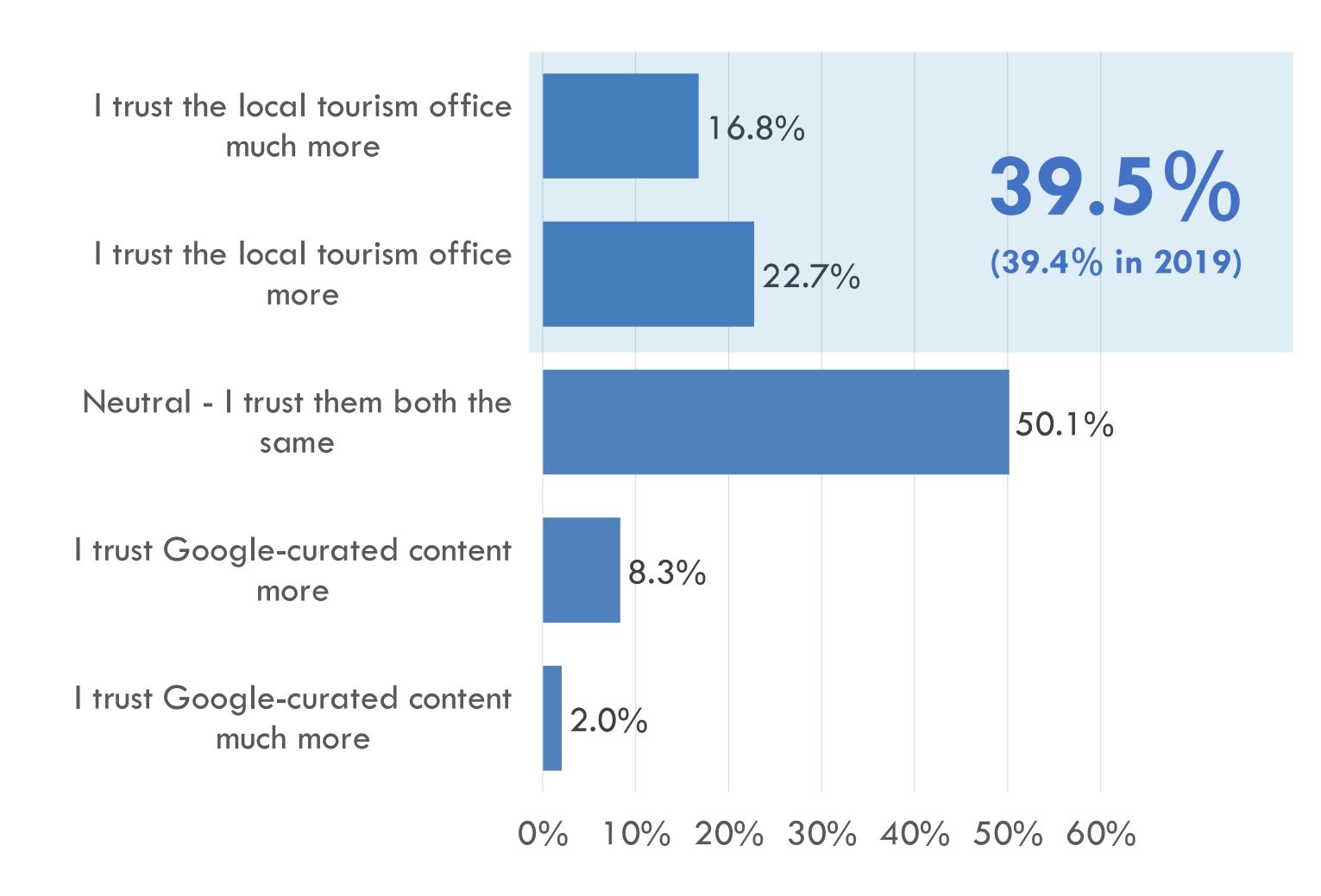
Question: How much would you trust the content, opinions and advice available of Google-curated destination content?





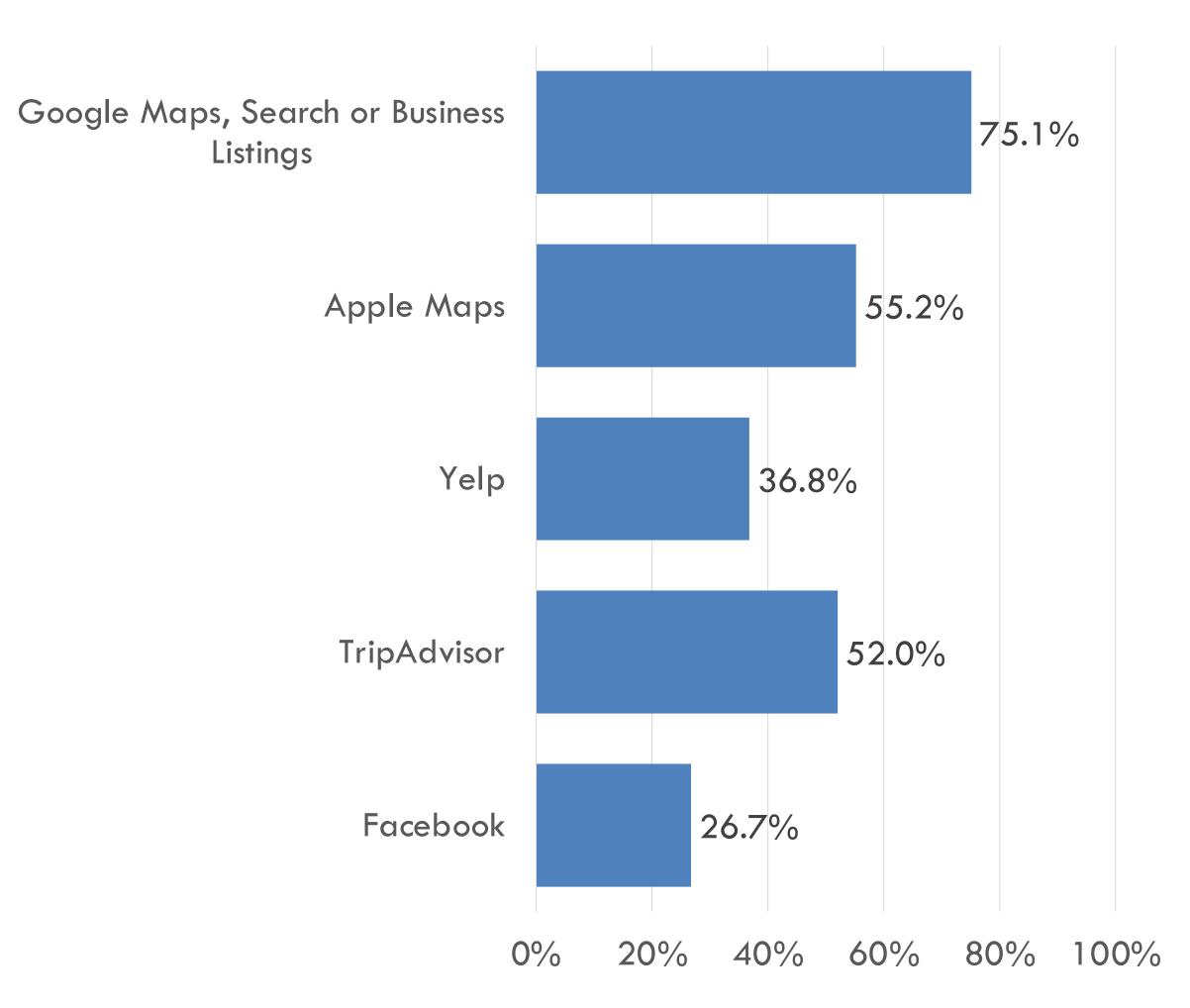
TRUST: DMO VS. GOOGLE-CURATED DESTINATION CONTENT

Question: Which content,
opinions and advice would
you generally trust more? A
local visitor bureau/tourism
office or Google-curated
content?





TRUST IN BUSINESS INFORMATION RESOURCES



% always or usually trustworthy

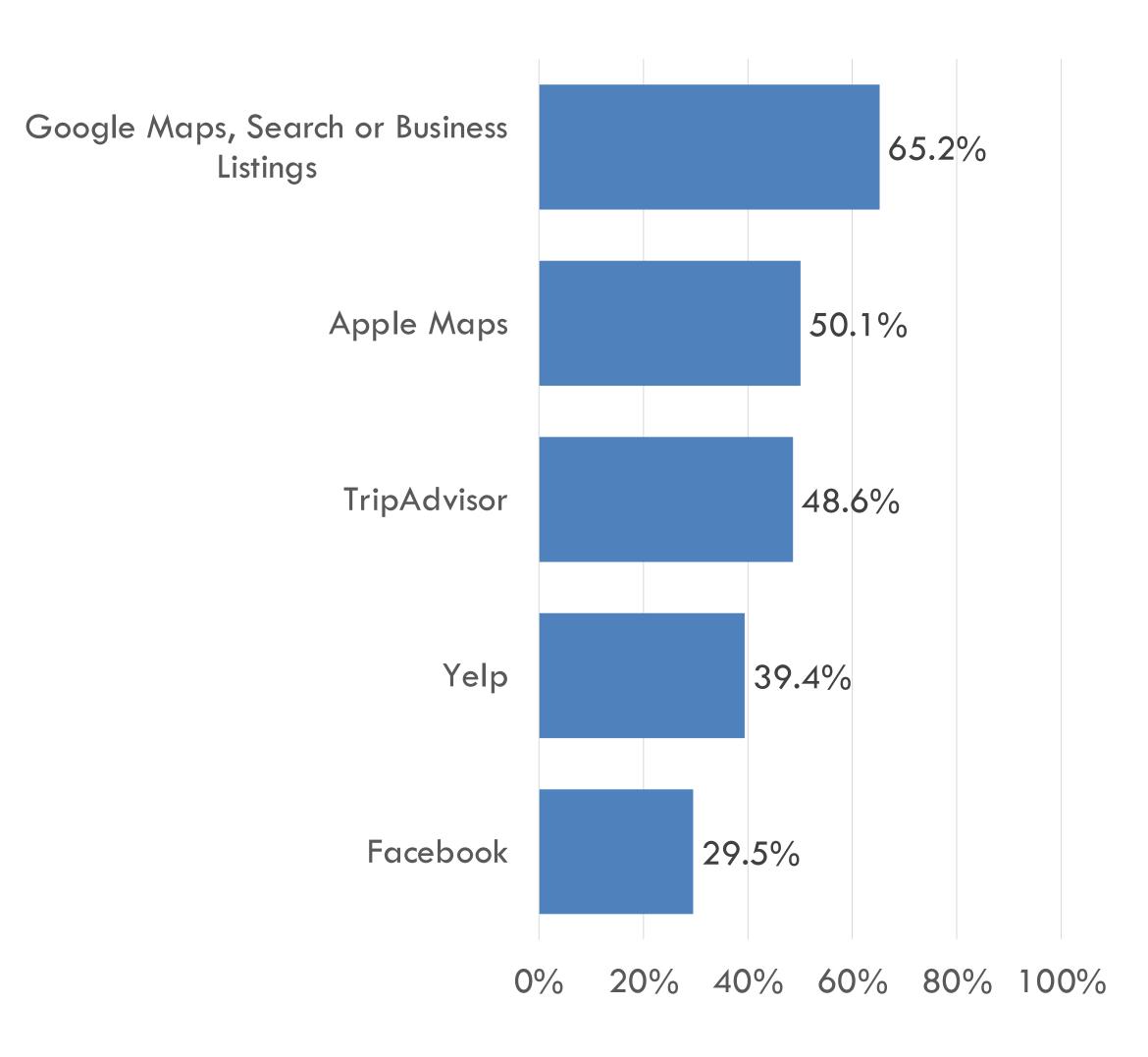
Question: Please evaluate how
trustworthy each of these are when
looking for business
information (e.g., hours, menu,
location, services)



Destination <a>Analysts

TRUST IN USER REVIEW RESOURCES

Question: Please evaluate how trustworthy is the customer rating/review information available on each platform.

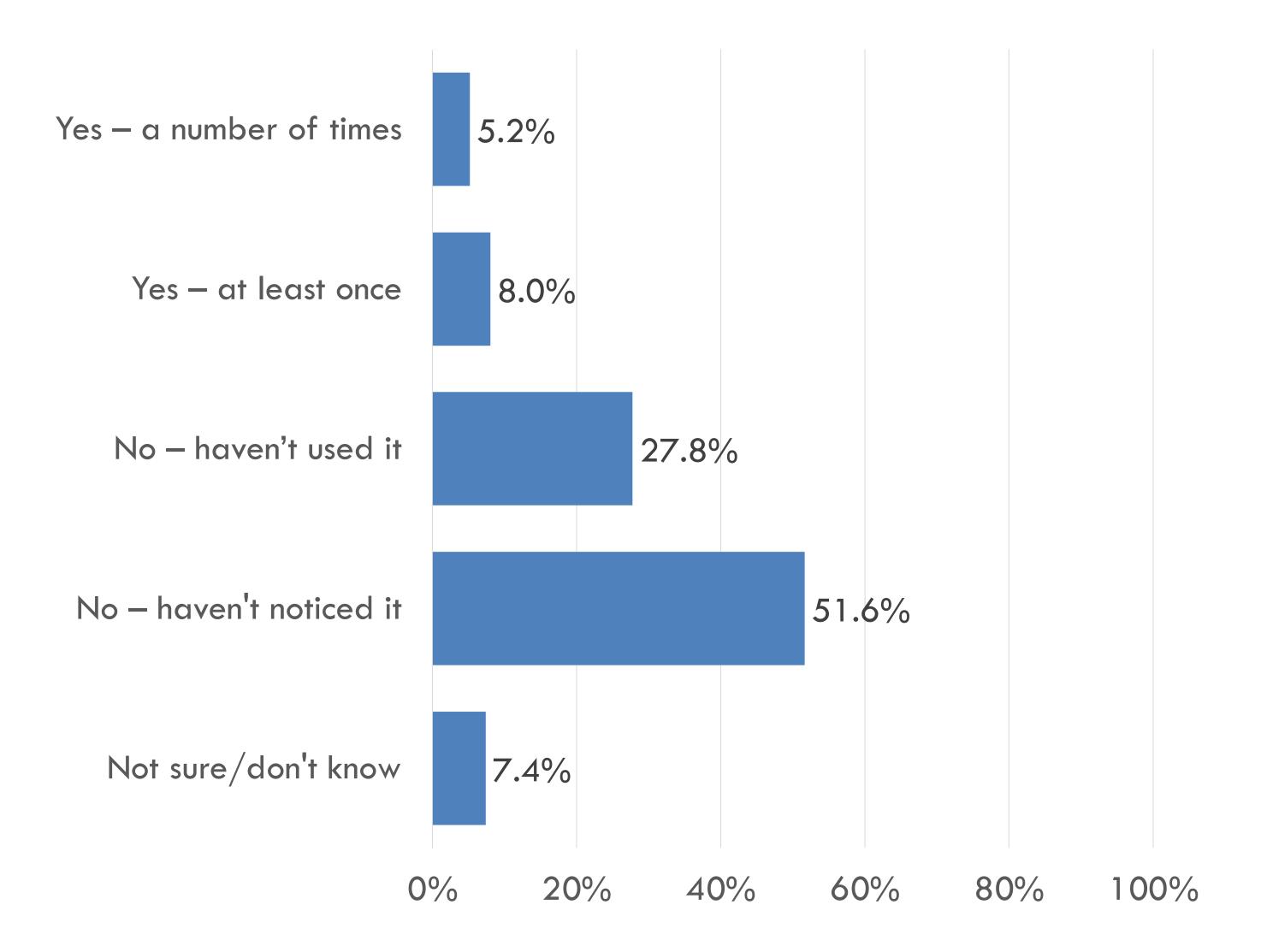


% always or usually trustworthy



USE OF GOOGLE TICKETS & TOURS

Question: Have you used
Google's new 'Tickets & Tours'
feature to view, plan and/or
book travel activities?





THE STATE OF THE AMERICAN TRAVELER: TECHNOLOGY EDITION

Research, slides and other resources will be available at www.milespartnership.com/SAT www.destinationanalysts.com





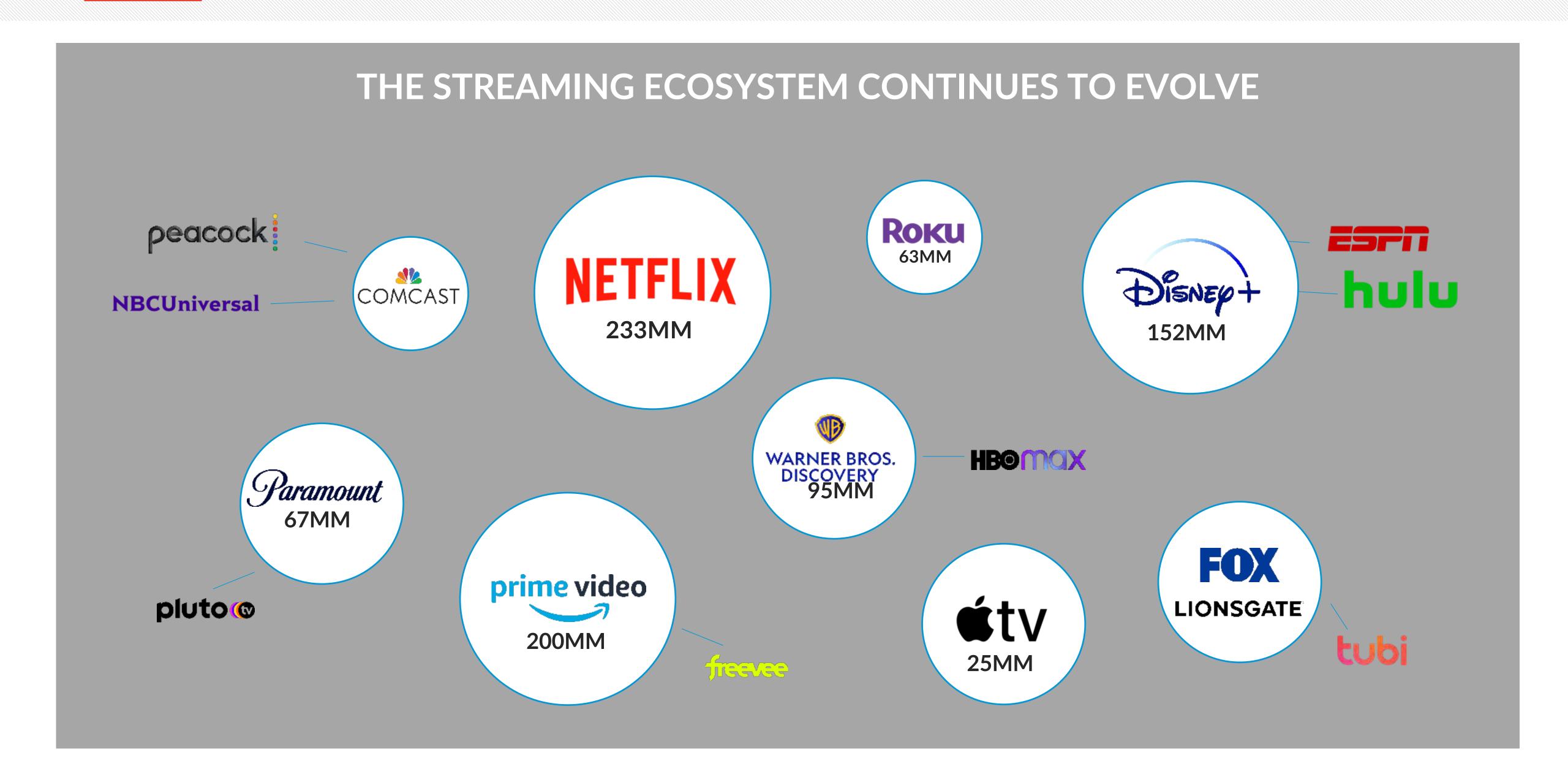








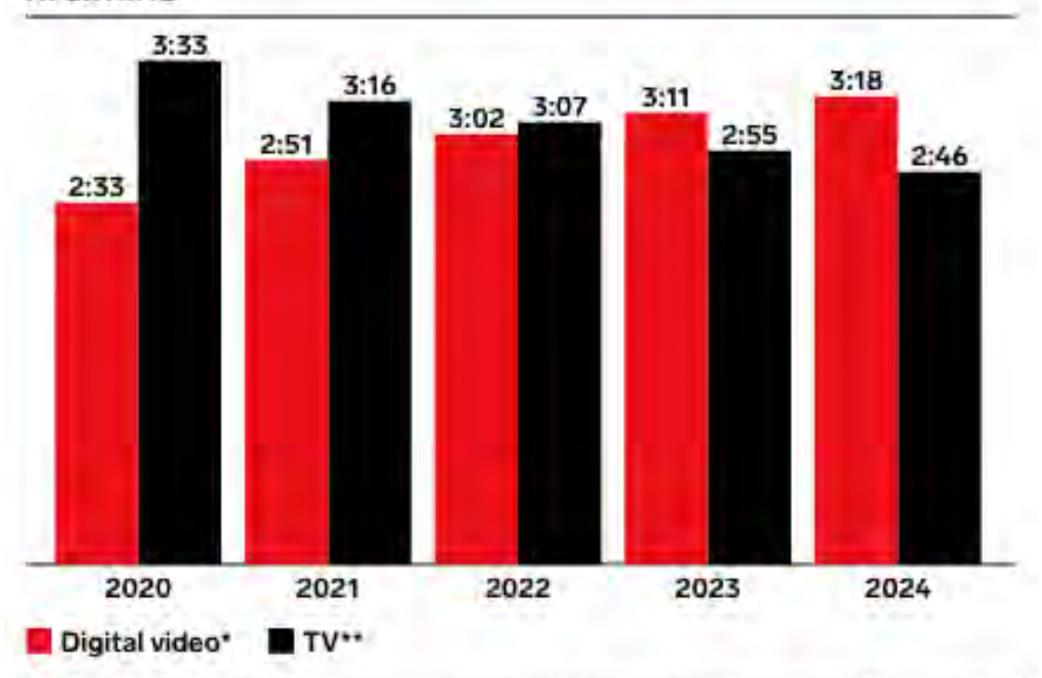
STREAMING TV CONSOLIDATION



TV EVOLUTION

Average Time US Adults Spend per Day With Digital Video* and TV**, 2020-2024

hrs:mins



Note: ages 18+; "includes all time spent with online video activities; includes viewing via any device; includes time spent with video via social networks; "includes live, DVR, and other prerecorded video (such as video downloaded from the internet but saved locally); includes all time spent watching TV; excludes digital Source: Insider Intelligence, Jan 2023



280824 InsiderIntelligence.com

STREAMING TV CONSOLIDATION

The Current Streaming Ecosystem

- Time spent on digital video will surpass traditional TV for the first time this year
 - Less than half of US households now subscribe to traditional pay TV
 - Led by ConnectedTV (CTV)
- Consumers would rather save money than avoid ads (64%)
- As most streaming platforms move to ad supported offerings, there will need to be consolidation
- 79% of Wi-Fi enabled homes are watching streaming content on CTV devices



QR CODES IN TV

To QR Code or Not To?

2022 Coinbase Super Bowl Ad revived the QR code in advertising

- Over 20 million people visited Coinbase's landing page in a single minute
- Coinbase jumped from 186th place to 2nd on the app store
- It was the commercial to prominently display a QR code
- Due to the website traffic, the site crashed



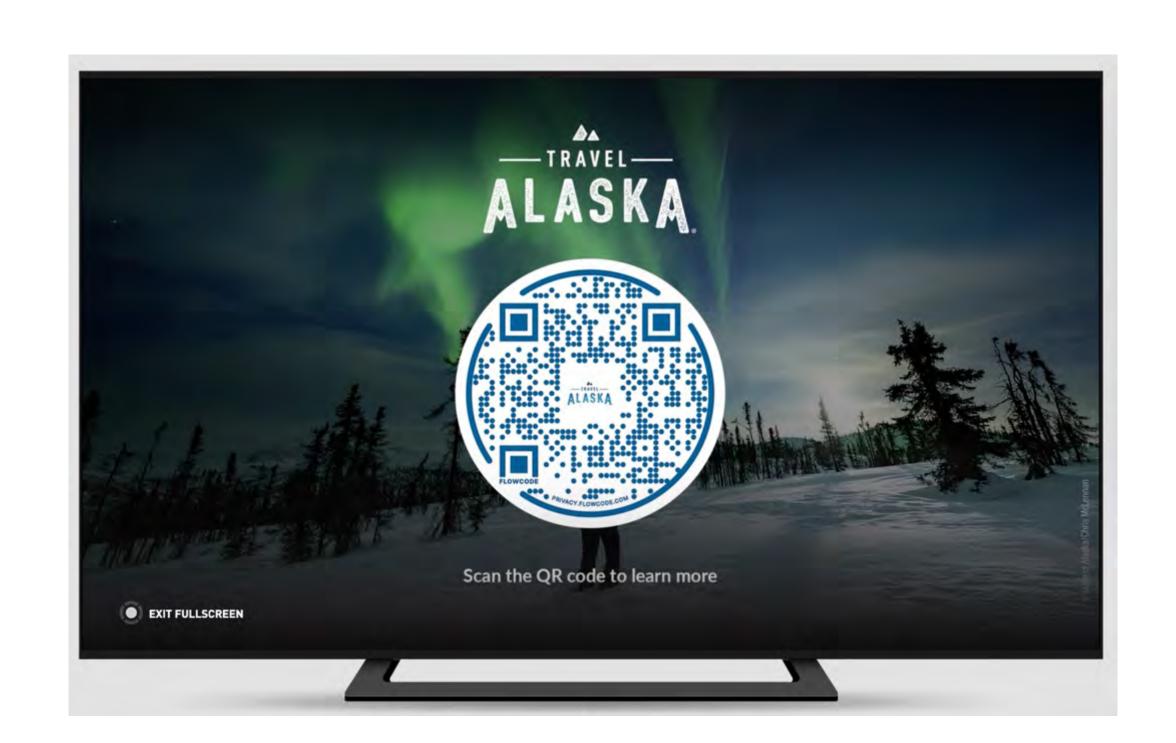
QR CODES IN TV

How to Use a QR Code

 A good way to take a high funnel tactic (TV)
 and still drive site traffic

 Drive users to engaging content, you have to have something worth scanning for

User can not have a bad experience (site crashing)



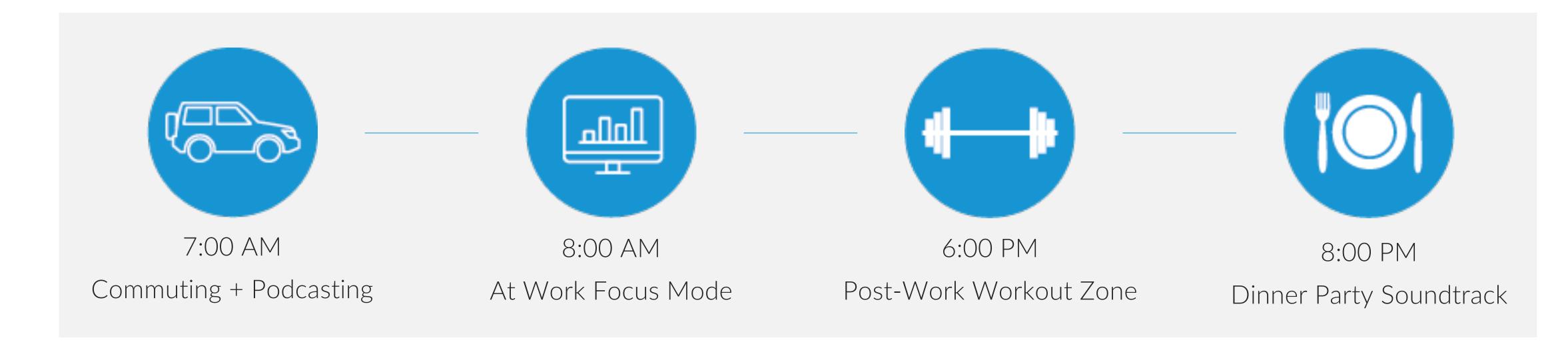


STREAMING AUDIO

Surround Sound: Audio is Everywhere

- 96% of Americans ages 13+ listen to some form of audio daily
- 3 hours per day are being spent with streaming audio 75% of that time is ad supported
- Streaming audio only captures 2.5% of all digital ad spend

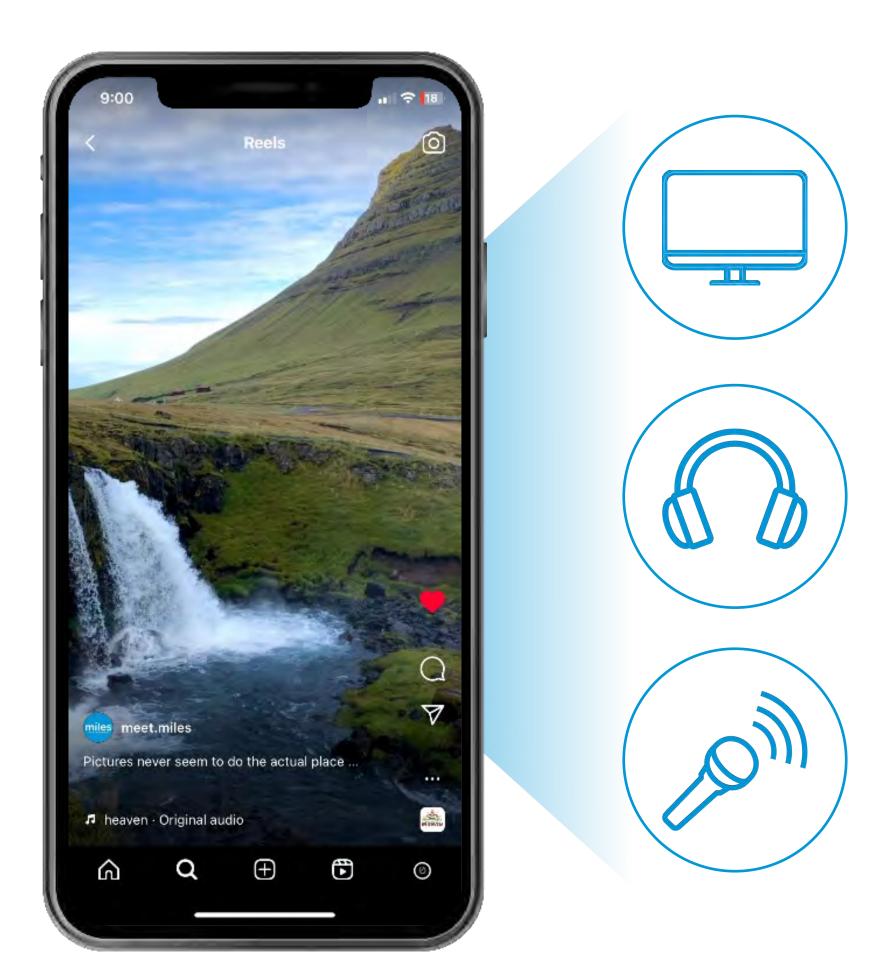




Audio Branding Cements Memorability

Brands should be heard as much as they are seen.

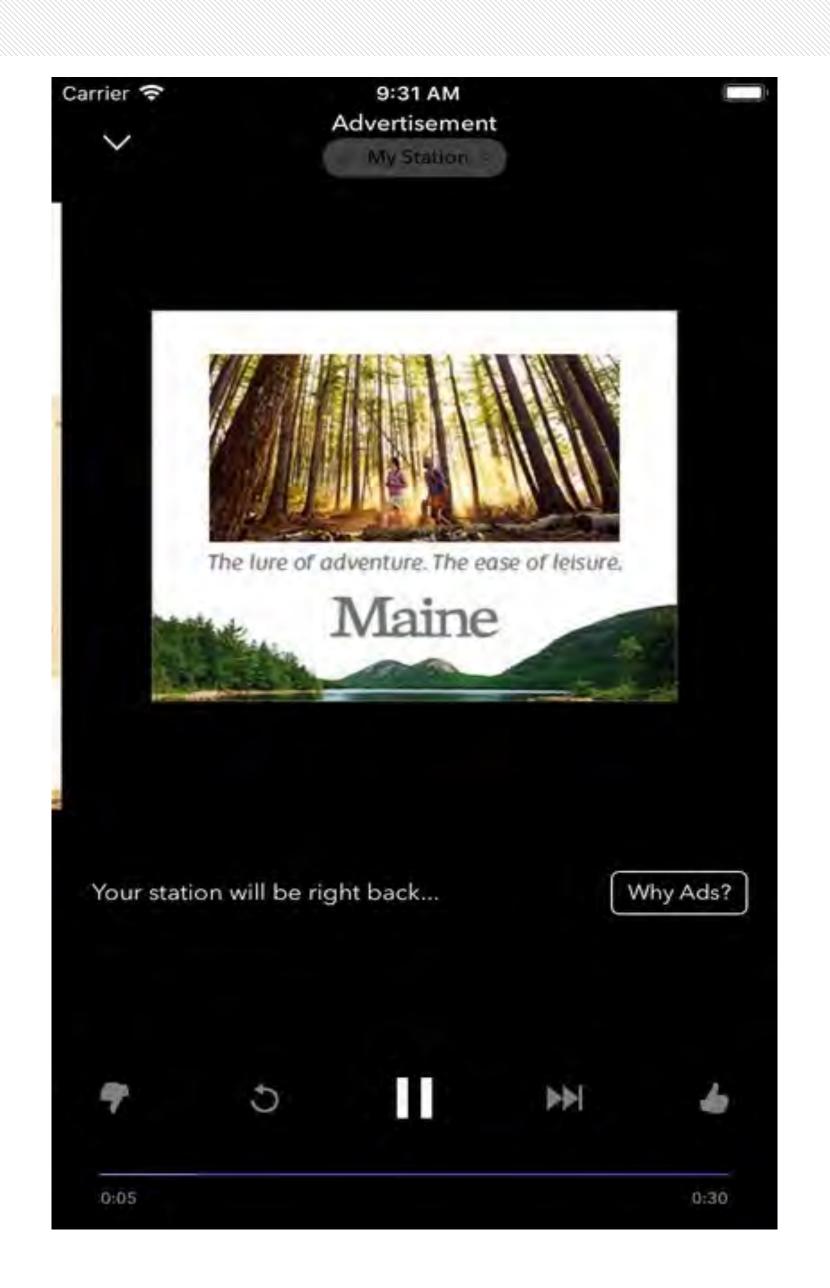
SOUND CREATES CROSS-CHANNEL SYNERGY



STREAMING AUDIO

Should You Implement?

- Nearly every American now listens to some form of streaming audio
- Develop strategies that lean into consumer listening habits
- Brands should start to develop robust audio strategies





THE COOKIELESS FUTURE

We're Living in the Cookieless Future, Now

- Safari & Firefox already block third-party cookies
- Google plans to eliminate third-party cookies for 1% of chrome users in Q1, 2024
- What it impacts?
 - Audience targeting capabilities
 - Measurement and attribution
 - Website traffic and performance



THE COOKIELESS FUTURE

We're Living in the Cookieless Future, Now

- Ensure any measurement plan put into place accounts for continued deprecation of cookies
- Prepare for decreased website and media metrics
- Current Solutions:
 - Data Clean Rooms
 - Mixed Media Modeling
 - Server to Server Connections



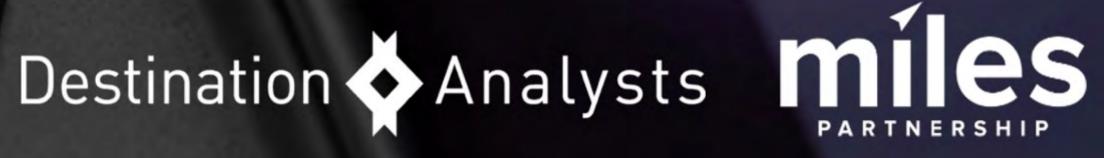




VERTICAL VISION

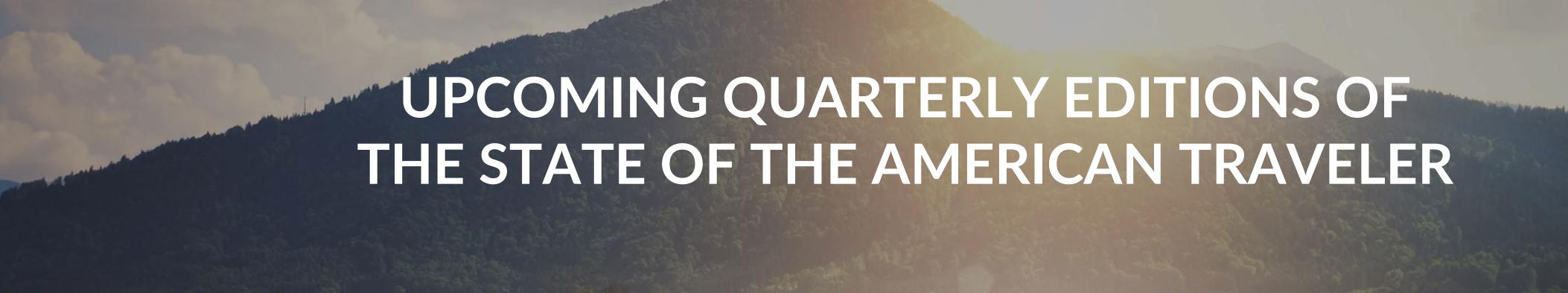
DESTINATION ANALYSTS + MILES PARTNERSHIP

June 1, 2023









Traveler Segments Edition: August 29, 2023

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