

USA ROAD TRIPS RESEARCH SUMMARY

RESEARCH & INSIGHTS ON ROAD TRIP TRAVEL ACROSS THE USA
Research from Longwoods International and
Analysis and Insights from Miles Partnership



USA ROAD TRIPS RESEARCH SUMMARY

Full research and resources are available at milespartnership.com/usa-road-trips



VISITOR PROFILE

GENDER
51% FEMALE • 49% MALE

FAMILIES
33% TRAVELING WITH KIDS

EDUCATION
66% COLLEGE DEGREE

ETHNICITY

WHITE	85%
OTHER	10%
HISPANIC BACKGROUND	9%
AFRICAN AMERICAN	6%

HOUSEHOLD INCOME

UNDER \$50,000	35%
\$50,000 - \$100,000	41%
OVER \$100,000	25%

↑ Significant Increase in Share of Road Trips 1997 - 2019 ↓ Significant Drop in Share of Road Trips 1997 - 2019

THE BOTTOM LINE

\$51.3 BILLION DIRECT SPENDING BY U.S. ROAD TRIPS TRAVELERS

108 MILLION ADULTS • 29 MILLION CHILDREN

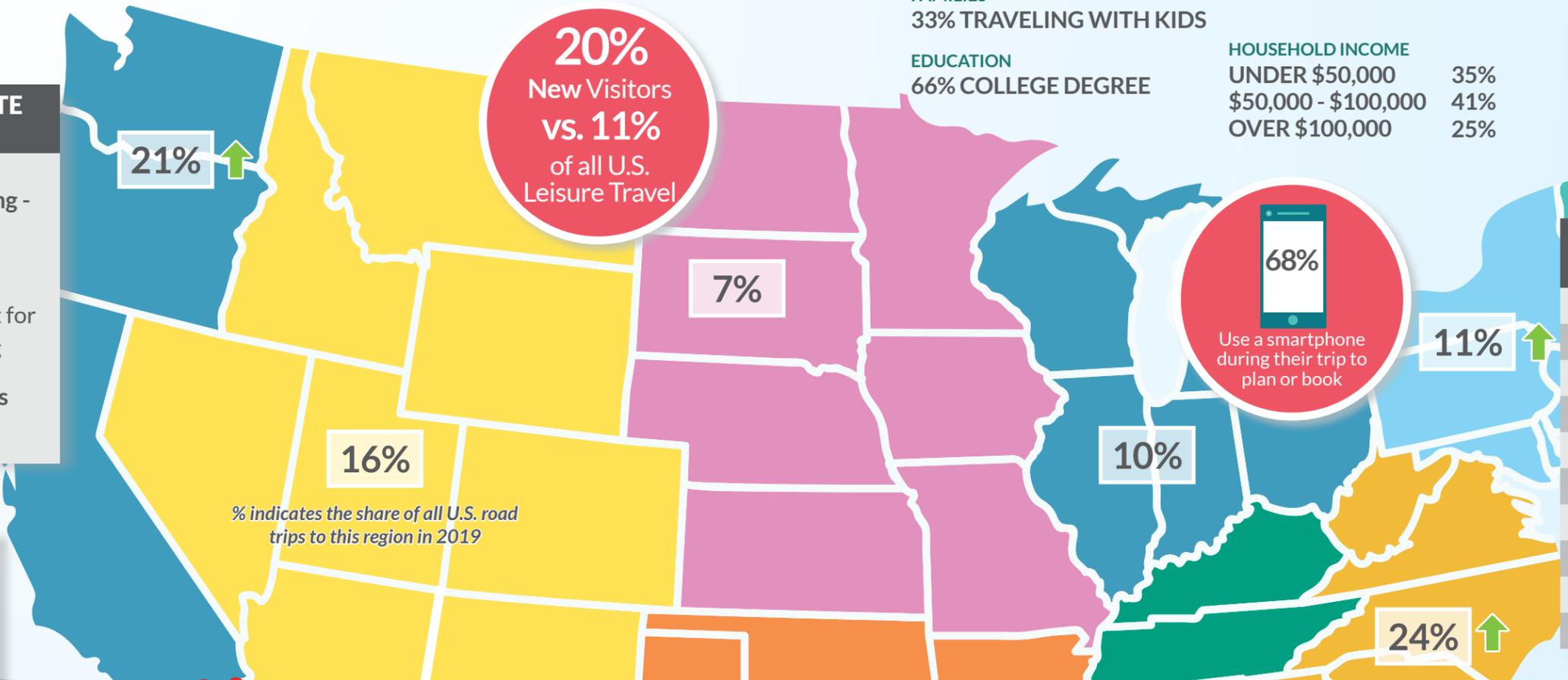
137 MILLION ROAD TRIPS IN THE USA IN 2019

LONGER & MULTI STATE ROAD TRIPS

- 28% of Road Trips are Long - 5 nights or more
- 45% of Spending Longer Road Trips account for almost half of spending
- 67% that Visit 3+ States have a trip of 5+ nights

TRANSPORTATION

Own Car	70%
Rental Car	14%
Camper/RV	2%
Motorcycle	1%



20%
New Visitors vs. 11% of all U.S. Leisure Travel

68%
Use a smartphone during their trip to plan or book

SOURCES OF INFORMATION

Hotel or Resort Information	21%
Destination Websites (City, State)	18%
Online Travel Agencies	18%
Advice from Relatives or Friends	14%
Social Media	11%
Travel Company Website	11%
AAA - Auto Club	11%
Travel Guide	10%
Official Visitor Guide	9%
Visitor Bureau/Govt Agency	9%

ROAD TRIPS WILL LEAD IN THE RECOVERY FROM COVID-19

First Trip U.S. Travelers Will Take in the Next Six Weeks*

35% of U.S. travelers are not planning any travel but for those that are:

- 61% of U.S. travelers will travel by car for their next trip
- 40% will travel by car to visit friends or relatives (VFR)
- 23% will go on a VFR trip within 200 miles; 17% more than 200 miles
- 21% will travel by car on a leisure trip (not incl. VFR)
- 13% will go on a leisure road trip within 200 miles; 8% more than 200 miles
- 15% will vacation at home first (i.e., staycation)
- 21% will fly within the U.S. and 3% internationally

*As of September 2020. COVID-19 Travel Sentiment Study, Longwoods

MAJOR U.S. TRAVELER CONCERNS FROM COVID-19

Addressing these concerns is critical to stimulating road travel:

86% are confused about travel restrictions and rules on their trip

Agreed with one or more of these statements as of August 2020:

- Travel restrictions are unclear or vary between, or in, the destinations I'm interested in visiting
- Health & safety protocols are unclear or vary between, or in, the destinations I'm interested in visiting

40% do not feel safe traveling outside their community	25% are not sure that visitors will be welcome where they want to travel
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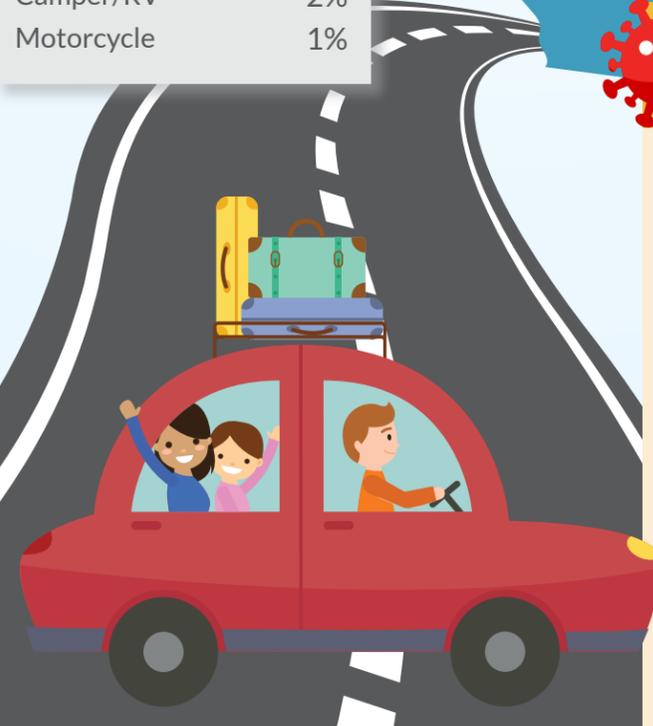
*As of August 2020. COVID-19 U.S. Travel Sentiment Study, Longwoods International

ROAD TRIP ACTIVITIES DURING COVID-19

When asked about what activities they wanted to do on their next vacation, U.S. travelers said:

Dine at a restaurant	57%
Go shopping	52%
Go to relax or recreate at an ocean, lake or river	50%
Visit a national park, state park or monument	34%
Participate in other outdoor activities or adventures	34%
Go on a hike or bicycle ride	30%
Visit a museum, art gallery or other arts/cultural institution	20%
Visit an amusement park, theme park or water park	20%
Go to a winery, brewery or distillery	17%
Go to a live musical, cultural, food or other event	14%
Go on an organized tour (by road, water, rail or air)	11%
Don't know, not sure	8%
Other	5%

*As of June 2020. COVID-19 U.S. Travel Sentiment Study, Longwoods International



EXAMPLES & MARKETING TIPS

ROAD TRIPS INSIGHTS

USA ROAD TRIPS EXAMPLES ACROSS THE U.S.

Road trip marketing efforts are expanding to meet the demand during the recovery from COVID-19.



Brand USA: Dozens of road trip ideas and itineraries are available that are also ideal for domestic visitors. Many include touring routes across multiple states – an obvious opportunity to build joint marketing coming out of this crisis.*

MORE: [visittheusa.com/usa-trip-ideas](https://www.visittheusa.com/usa-trip-ideas)



Maryland: Visit Maryland built on its long-term commitment to marketing road trips during the COVID-19 crisis by repurposing existing video content to create new COVID-19 oriented video and other messaging.*

MORE: [visitmaryland.org/scenic-byways](https://www.visitmaryland.org/scenic-byways)

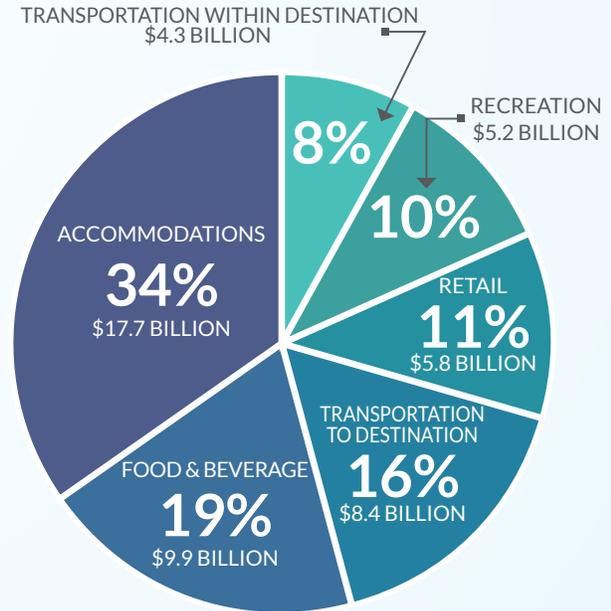


Kentucky: Kentucky Tourism tightly integrates experiences into its road trips by offering themed itineraries (eg: Family Fun or Spiritual Travel) in addition to a range of inviting Culinary Trails that includes cooperative marketing with its State Parks Department.*

MORE: [kentuckytourism.com/explore-kentucky/road-trips-trails](https://www.kentuckytourism.com/explore-kentucky/road-trips-trails)

*Brand USA, Maryland Office of Tourism, Kentucky Department of Tourism and Chattanooga Tourism Company are all clients of Miles Partnership.

TOTAL ROAD TRIPS SPENDING = \$51.3 BILLION



5 ESSENTIAL TIPS FOR MARKETING ROAD TRIPS

- 1 ENGAGE WITH LOCALS:** Many road trips are to visit friends and family. Engage with local residents to stimulate this market. You will need locals' support in getting out into the community themselves and in welcoming visitors back to your destination during the recovery from COVID-19.
- 2 CLEAR AND CONSISTENT HEALTH GUIDELINES:** U.S. road travelers want to know they can travel safely. This starts with implementing clear and consistent health and safety guidelines across your destination, ensuring public places and businesses are all on board with the same standards. Work with your tourism operators to ensure they are supported in the changes they need to make to their business and staff training.
- 3 CALLS TO ACTION:** Once you have addressed health and safety concerns, use a strong call to action to stimulate engagement. To maximize yield from the recovery of tourism, think about engaging experiences or value-adds such as highlighting outdoor experiences (which are particularly attractive during COVID-19) or, since VFR is an important part of road trips, offering discounts for locals hosting their friends and families.
- 4 HYPER-INFORMED & ACTIVE:** Road trip travelers are adventurous, curious and hungry for information! They seek a wide range of activities during their trip and are heavy users of both online and offline media in trip planning. DMO websites are a top source of information, so make sure you meet and exceed their high expectations for the depth and range of content.
- 5 ESSENTIAL PARTNERSHIPS:** Road trip travelers are explorers without regard for state, city or county borders. DMOs need to work with a wide range of industry partners and other DMOs in their own state and, importantly, other states to offer a compelling visitor proposition. Develop products and marketing programs that link complementary experiences into road trip itineraries, regardless of county or state boundaries. In the recovery from COVID-19, this is now an even greater opportunity.

BONUS TIP: STAY CURRENT Keep your road trips marketing up to date during the recovery from COVID-19. Resources include Longwood International's COVID-19 Traveler Sentiment Study sponsored by [Miles](https://www.milespartnership.com) and the [Arrivalist Daily Travel Index](https://www.arrivalist.com).