UPCOMING WEBINAR:

US Travel Outlook
Use of New Technology
Google’s Curated Content
Examples & Takeaways

Spotlight:
Big Data & Destination Decisions with Sojern

June 2nd 2016
Greetings

Chris Adams
+1 303 842 3394
Chris.Adams@MilesPartnership.com
Social: KiwiColorado

Erin Francis - Cummings
+1 415 716 7983
Erin@DestinationAnalysts.com
Social: erincummings31
In Association with

SOUTHEAST
TOURISM SOCIETY
How to participate in today’s webinar

Grab Tab *(open or close the control panel)*

Choose your audio

Use Text Box to ask questions

In case of “Drop-Off”, use your Link to rejoin the webinar

A Question & Answer Session will be held at the end of today’s session

Today’s webinar is being recorded and will be made available for later viewing
TECHNOLOGY EDITION

Agenda

1. Research: Travel Outlook
2. Research: Use of New Technology
3. Research: Google’s Curated Content
4. Examples & Takeaways
5. **Spotlight:** Big Data & Destination Decisions *(Sojern)*
The State of the American Traveler

Summary of Latest Findings
Research Overview

- Online survey conducted since 2006. Quarterly production beginning in 2016
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000+ American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- March 2016
The State of the American Traveler

The Technology Edition
The State of the American Traveler

Travel Sentiment
How are American travelers feeling about travel right now?
Americans Expecting to Travel More for Leisure

Record High

Bar chart showing percentage of Americans expecting to travel more for leisure from July 2013 to April 2016.
Americans Expecting to Spend More on Travel

Another Record High
The State of the American Traveler

WORD-OF-MOUTH IN TRAVEL DECISION MAKING
How DESTINATION CHOICE Is Influenced by Word-of-Mouth
SCENARIO: We asked travelers to talk about one specific destination they hoped to visit this year, and tell us if their friends and relatives had been talking about it.
Question: Please think about the people you have had contact with who have shared their opinions with you about <destination>. Did these persons’ experiences, advice or opinions have any impact on your interest in visiting <destination>?
Destination Choice Influenced by Word-of-Mouth

- 59.8% Yes
- 35.6% No
- 4.6% I don’t know
Importance of Word-of-Mouth to Destination Decision

Question: How important were these opinions to your interest in visiting <destination entered by respondent in previous question>?

- 45.8% Very important
- 43.4% Important
- 9.9% Neutral
- 0.6% Unimportant
- 0.3% Very unimportant
Travelers’ Destination Decisions Significantly Influenced by Word-of-Mouth

53%
How Word-of-Mouth Happens

- **90.4%** Personal conversation (face-to-face conversation, telephone call, etc.)
- **35.6%** Social media (Facebook, Twitter, Instagram, Pinterest, etc.)
- **29.4%** Email, texts, postcards or letters

**Question:** In which ways did the people you know talk about <destination entered by respondent in previous question>?
How Travelers Learn about New Technologies

- 64.3% Word-of-mouth
- 37.9% Television
- 37.4% Social media websites
- 25.9% Magazines (printed)
- 15.4% Magazines (online)
- 13.7% Technology blogs
- 9.9% Radio
- 6.0% Email
- 3.9% Trade shows or conferences
The State of the American Traveler

TECHNOLOGY ADOPTION IN TRAVEL
Keeping Up-to-Date with Travel Technology

- 11.5% I’m totally up to date
- 25.2% I’m keeping up
- 35.4% I’m generally keeping up, but not completely
- 17.1% I’m falling behind
- 10.9% I’m not interested in new travel technology
The Promise of Travel Technology

New technologies hold the promise to make my travel experiences much more rewarding.

Agree: 56.2%
The Five Segments Of Traveler Technology Adopters
**Late Majority (37.2%)** - These travelers approach new technology with skepticism, and show a large gap in metrics tracked compared to the Early Majority. Far less likely to have children at home, but much more likely to be married, they tend to be older men and take the fewest leisure trips annually.

**Laggards (10.2%)** - The last to adopt a technical innovation, most are Baby Boomers. They are predominantly male, and travel slightly less than the norm. They are the least likely to have an income over $80K and are the most likely group to be Caucasian suburban dwellers.

**Early Majority (33.4%)** - Interest in advanced technologies drops off sharply with this group, as does the degree of control they personally have in travel planning decisions. Overall, this group travels less often and consumes less travel content.

**Early Adopters (12.6%)** - A close cousin to the Innovator, Early Adopters enjoy exploring new technologies. They’re also ethnically diverse (only 54.7% Caucasian), but have lower incomes than Innovators. Their measured interest in new technologies for travel planning far outpaces the Early Majority.

**Innovators (6.5%)** - The first to adopt new travel technologies, Innovators are mostly Millennials (48.9%) and Gen-Xers (37.4%). They travel the most and have the largest annual travel budgets. They are much more ethnically diverse and are far less risk averse, but much more likely to “completely call the shots” in making their travel decisions.
The State of the American Traveler

Use, Trust & Importance in Travel Planning Resources
## Destination Selection Importance Index

<table>
<thead>
<tr>
<th>Source</th>
<th>Mean Importance Score (5-Point Scale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relatives (face to face)</td>
<td>3.33</td>
</tr>
<tr>
<td>Friends (face to face)</td>
<td>3.19</td>
</tr>
<tr>
<td>Review websites (TripAdvisor, Yelp, etc.)</td>
<td>2.95</td>
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<tr>
<td>Official destination tourism office printed visitor guides</td>
<td>2.81</td>
</tr>
<tr>
<td>Official destination tourism office websites</td>
<td>2.79</td>
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<tr>
<td>Official destination tourism offices (face to face)</td>
<td>2.74</td>
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<tr>
<td>Relatives (via social media)</td>
<td>2.72</td>
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<tr>
<td>Travel businesses—Hotels, attractions, airlines, etc. (commercial websites)</td>
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<tr>
<td>Travel-related TV programs</td>
<td>2.67</td>
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<tr>
<td>Hotel staff, concierges</td>
<td>2.63</td>
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<tr>
<td>Friends (via social media)</td>
<td>2.61</td>
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<td>Travel agents (person to person)</td>
<td>2.61</td>
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<td>Magazine articles (online or print)</td>
<td>2.60</td>
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<tr>
<td>Newspaper travel sections (online or print)</td>
<td>2.57</td>
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<tr>
<td>Travel businesses—Hotels, attractions, airlines, etc. (via social media)</td>
<td>2.53</td>
</tr>
<tr>
<td>Co-workers (face to face)</td>
<td>2.52</td>
</tr>
<tr>
<td>Online video (e.g., YouTube)</td>
<td>2.46</td>
</tr>
<tr>
<td>Official destination tourism offices (via social media)</td>
<td>2.42</td>
</tr>
<tr>
<td>Co-workers (via social media)</td>
<td>2.25</td>
</tr>
</tbody>
</table>
## Trust Index

<table>
<thead>
<tr>
<th>Source</th>
<th>Mean Trust Score (5-Point Scale)</th>
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</thead>
<tbody>
<tr>
<td>Relatives</td>
<td>3.91</td>
</tr>
<tr>
<td>Friends</td>
<td>3.84</td>
</tr>
<tr>
<td>Hotel staff, concierges</td>
<td>3.33</td>
</tr>
<tr>
<td>Official destination tourism offices (person to person contact)</td>
<td>3.32</td>
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<tr>
<td>Relatives (via social media)</td>
<td>3.30</td>
</tr>
<tr>
<td>Official destination tourism office websites</td>
<td>3.29</td>
</tr>
<tr>
<td>Official destination tourism office printed visitor guides</td>
<td>3.29</td>
</tr>
<tr>
<td>Review websites (TripAdvisor, Yelp, etc.)</td>
<td>3.28</td>
</tr>
<tr>
<td>Travel agents (person to person)</td>
<td>3.22</td>
</tr>
<tr>
<td>Friends (via social media)</td>
<td>3.21</td>
</tr>
<tr>
<td>Co-workers</td>
<td>3.20</td>
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<tr>
<td>Travel-related TV programs</td>
<td>3.15</td>
</tr>
<tr>
<td>Magazine articles (online or print)</td>
<td>3.12</td>
</tr>
<tr>
<td>Newspaper travel sections (online or print)</td>
<td>3.11</td>
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<tr>
<td>Online video (e.g., YouTube)</td>
<td>2.99</td>
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<tr>
<td>Official destination tourism offices (via social media)</td>
<td>2.90</td>
</tr>
<tr>
<td>Travel businesses--Hotels, attractions, airlines, etc. (via social media)</td>
<td>2.86</td>
</tr>
<tr>
<td>Co-workers (via social media)</td>
<td>2.86</td>
</tr>
</tbody>
</table>
Organic Search Results Winners

1. The Top 10 Things to Do in Portland - TripAdvisor - Portland, OR Attractions...
   - Mobile-friendly: Book your tickets online for the top things to do in Portland, Oregon on TripAdvisor. See 31605 traveler reviews and... 
   - Columbia River Gorge...

2. Things To Do in Portland, Oregon - Travel...
   - https://www.travelpornando.com › things-t...
   - Mobile-friendly: Plan your trip to Portland, Oregon, with guides to activities, attractions, events, dining, culture, neighborhoods and...

3. Things To Do In Portland - Deals in Portland, OR | Groupon
   - Groupon › Local › Oregon › Portland
   - Mobile-friendly: Things To Do in Portland, OR: Discover the best things to do in Portland with deals of 50-90% off every day along.

4. Top things to do in Portland - Lonely Planet
   - Lonely Planet › Oregon
   - Mobile-friendly: Discover the beauty, culture and history of Portland on a guided bike tour – the ideal way to experience the city!

- DMO Website: 41.8%
- Trip Advisor: 37.9%
- Groupon: 12.3%
- Lonely Planet: 8.0%
“It’s the official site for the city that lists the popular attractions - a good way to get an overview”

“The tourism office will always be one that grabs the most important and preferred travel requests”

“It gives me more choices from which to start looking”

“They know more about their city than anyone”

“I think I would find more on the official website than on the others.”

“The official guide is the most reliable”

“It offers the most likely list of what I want to see. It presumably has no commercial incentive for recommendations.”

“Official tourism sites offer all the things you may want to know”

“This agency website is likely to be the least biased in its listings and reporting.”

“While it would be the ‘rosiest’ description of things to do, it’s probably the most complete since it’s compiled by a tourism office.”
The State of the American Traveler

SEARCH & GOOGLE-CURATED CONTENT
Use Search Engines to Find Travel Related Information

- 77.2% YES
- 20.1% NO
- 2.6% I DON’T KNOW
Now, please imagine you're using a mobile phone to research things to do in Portland.

You enter the search phrase “Things to do in Portland,” and the following results are returned.

What would you most likely do?
• Click on one of the visible items—57.4%
• Scroll down to the organic listings—33.0%
• Enter another search phrase—9.6%
Google-Curated Content
Google-Curated Content

Interest in Use for Destination Research

- 35.8% Interested
- 32.0% Neutral
- 15.1% Very interested
- 9.3% Uninterested
- 7.8% Very uninterested
## Google-Curated Content

### Trust: Google-Curated Content

<table>
<thead>
<tr>
<th>Trust Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always trustworthy</td>
<td>11.2%</td>
</tr>
<tr>
<td>Usually trustworthy</td>
<td>44.8%</td>
</tr>
<tr>
<td>Sometimes trustworthy</td>
<td>37.8%</td>
</tr>
<tr>
<td>Rarely trustworthy</td>
<td>4.8%</td>
</tr>
<tr>
<td>Never trustworthy</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

### Importance: Google-Curated Content

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely important</td>
<td>10.9%</td>
</tr>
<tr>
<td>Important</td>
<td>21.7%</td>
</tr>
<tr>
<td>Of some importance</td>
<td>34.9%</td>
</tr>
<tr>
<td>Of little importance</td>
<td>19.2%</td>
</tr>
<tr>
<td>Of no importance</td>
<td>13.3%</td>
</tr>
<tr>
<td>Option</td>
<td>Percentage</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>I trust the local tourism office <em>much more</em></td>
<td>13.7%</td>
</tr>
<tr>
<td>I trust the local tourism office more</td>
<td>25.8%</td>
</tr>
<tr>
<td>Neutral - I trust them both the same</td>
<td>49.0%</td>
</tr>
<tr>
<td>I trust Google-Curated Content more</td>
<td>9.6%</td>
</tr>
<tr>
<td>I trust Google-Curated Content <em>much more</em></td>
<td>1.9%</td>
</tr>
</tbody>
</table>

**Question:** Which content, opinions and advice would you generally trust more? A local visitor bureau/tourism office or Google-Curated Content? (Select one)
The State of the American Traveler

Newest Technology Use and Potential
63.1% Have heard of VR Headsets

7.0% Have used a VR Headset to plan leisure travel

46.6% Would be interested in using a VR Headset to plan travel if good content were available
38.2% Have heard of real-time video

10.1% Have used real-time video to plan leisure travel

45.7% Would be interested in using real-time video to plan travel if good content were available
<table>
<thead>
<tr>
<th>Use of Cutting-Edge Tech Solutions (Past 12 months)</th>
<th>Used for any reason</th>
<th>Used for leisure travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice-activated intelligent assistant (e.g., Siri or Cortana)</td>
<td>21.5%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Full virtual reality headset to view 3D content (e.g., Oculus, HoloLens)</td>
<td>12.3%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Smart Watch or other wearable device (e.g., Smart Bands/ Smart Clothing)</td>
<td>11.8%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Voice-activated Smart Speaker (e.g., Amazon Echo)</td>
<td>11.0%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Simple virtual reality/augmented reality headset to view 3D content (e.g., Google Cardboard)</td>
<td>9.0%</td>
<td>7.3%</td>
</tr>
<tr>
<td>iBeacon or Eddystone technology or similar solution on mobile phone (allows Apps to receive personalized content from nearby vendors)</td>
<td>7.7%</td>
<td>6.1%</td>
</tr>
<tr>
<td>None of these</td>
<td>69.3%</td>
<td>69.6%</td>
</tr>
</tbody>
</table>
Use of Peer-to-Peer Resources While Traveling

- **19.4%**
  Peer-to-peer ride service like Uber, UberX or Lyft

- **13.9%**
  Peer-to-peer lodging service like AirBnB, VRBO, Homeaway, etc.
Use of Peer-to-Peer Resources While Traveling

- 85.3% None of these
- 6.7% Peer-to-peer car-sharing sites (e.g., Turo/RelayRides)
- 5.9% Peer-to-peer bike share programs (e.g., Liquid or spinlister.com)
- 5.1% Peer-to-peer dining service to find a home chef to host dinner in their own homes for a fee
- 3.7% Peer-to-peer tour service for a tour guided by a local resident
Use of Apps for Travel Planning

71.4% NO
28.6% YES
## Types of Apps for Travel Planning

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Travel Agency (Expedia, Hotels.com, etc.)</td>
<td>55.8%</td>
</tr>
<tr>
<td>Recommendations (TripAdvisor, Yelp, Trippy, etc.)</td>
<td>48.7%</td>
</tr>
<tr>
<td>Hotel (Company specific, Hyatt, Hilton, Marriott, etc.)</td>
<td>45.9%</td>
</tr>
<tr>
<td>Airline</td>
<td>44.5%</td>
</tr>
<tr>
<td>Weather</td>
<td>32.3%</td>
</tr>
<tr>
<td>Destination-specific (State or city tourism office)</td>
<td>24.7%</td>
</tr>
<tr>
<td>Hotel (Last minute travel deals)</td>
<td>24.3%</td>
</tr>
<tr>
<td>Transportation (Local transportation system)</td>
<td>20.3%</td>
</tr>
<tr>
<td>Transportation (Bus, Ferry or train)</td>
<td>15.5%</td>
</tr>
<tr>
<td>Travel logistics management (Tripit, tripcase)</td>
<td>10.6%</td>
</tr>
<tr>
<td>Luggage tracking</td>
<td>9.2%</td>
</tr>
<tr>
<td>Itinerary builder</td>
<td>6.6%</td>
</tr>
<tr>
<td>Language translation</td>
<td>5.2%</td>
</tr>
</tbody>
</table>
The State of the American Traveler

MOBILE TRAVEL PLANNING
Travel Plan Extensively on Mobile

- 15.5% Strongly agree
- 21.9% Agree to some extent
- 16.4% Neither agree nor disagree
- 13.0% Disagree to some extent
- 33.2% Strongly disagree
EXAMPLES & KEY TAKEAWAYS
4 X Takeaways

1. High Tech & High Touch
2. VR Moves Towards the Mainstream
3. Google’s Travel Ambitions
4. Mobile – Next Generation
1: High Tech – High Touch

Travel is still all about people & relationships
2: VR Moves To Mainstream

VR & AR moves beyond early adopters
Visit St. Pete-Clearwater debuts virtual reality tours of beaches

Visit St. Pete-Clearwater Executive Director, David Downing, unveils the tourism agency's new 3-D goggles. The experience allows users to get a 360-view of Pinellas County's beaches and attractions. (June 1, 2015) Video by: Justine Griffin

SOURCE: TAMPA BAY TIMES
Virtual Reality Moves Towards the Mainstream

Is it virtual reality's “big moment?” Is VR finally moving from early adopters towards mainstream consumer use? In early November 2015, the New York Times launched a major virtual reality storytelling initiative in partnership with Google – including mailing 1.3 million Google Cardboard headsets to its subscribers in the US.

The New York Times' first major VR story, The Displaced, plots the journey of three refugees from around the world seeking a new life. The VR experience allows viewers to follow the journey with the ability to look around the locations as a 360-degree immersive experience. That same weekend the New York Times Magazine also launched a VR experience, Walking New York. Both are available as a traditional online story (editorial, images, maps) and also as a VR experience.
EXPLORE AUSTRALIA IN 360°
It's a place you feel

Vlasoff Cay, Great Barrier Reef, Queensland
Enjoy the Great Barrier Reef from underwater. Snorkel through the secluded Vlasoff Cay and get up close to unique wildlife in a 360° video.

WATCH VIDEO
Global All Stars

Jesse Desjardins
Global Manager, Social & Content, Tourism Australia

August 2\textsuperscript{nd} 2016
DMAI Annual Convention
3: Google’s Changes

Curated Content potentially a game changer
Modernista Barcelona

1. Güell Palace  1 hour
   Ornate modernist mansion that is a historically significant example of early Gaudi architecture.
   15 minutes walking

2. Palau de la Música Catalana

Barcelona

City in Spain

Barcelona, the cosmopolitan capital of Spain's Catalonia region, is defined by quirky art and architecture, imaginative food and vibrant street life. It has medieval roots, seen in the maze-like... More

Suggested itineraries
Deep Dive Into Google’s Travel Ambitions

by Dennis Schaal + Skift Team

Executive Summary

Google is already the dominant player in travel advertising but now, after four years of acquisitions and product development, the search giant is finally integrating its flight and hotel products. It is also ramping up Book on Google with the goal of making Google a go-to venue for travel.
4: Next Generation Mobile

Mobile Travel Planning is Rapidly Evolving
Mobile In Every Part of Travel

Travel Trends: 4 Mobile Moments Changing the Consumer Journey
Takeaways: Action This Day

1. High Tech & High Touch
2. VR moving to mainstream – but trade or meetings solution?
3. Google’s Ambitions raise the bar for Destinations
4. Mobile First starts with Situation First
QUESTIONS – COMMENTS?

Use the question box
DATA ON DESTINATION DECISIONS

SOJERN
Most Desired U.S. Destinations 2016
Dreaming Vs Searching Vs Booking

What Sojern Sees:

Top US Destinations
For Travel in 2016

<table>
<thead>
<tr>
<th>Searched</th>
<th>Booked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas</td>
<td>Las Vegas</td>
</tr>
<tr>
<td>New York City</td>
<td>New York City</td>
</tr>
<tr>
<td>Orlando</td>
<td>Chicago</td>
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<tr>
<td>Chicago</td>
<td>Orlando</td>
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<tr>
<td>San Francisco</td>
<td>Houston</td>
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<td>Los Angeles</td>
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<td>New Orleans</td>
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<td>Washington DC</td>
<td>Atlanta</td>
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<td>San Diego</td>
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<td>Boston</td>
<td>New Orleans</td>
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<tr>
<td>Atlanta</td>
<td>San Antonio</td>
</tr>
</tbody>
</table>

Source: Destination Analysts, Inc. | January 2016
Destination Excitement

What Sojern Sees:
Of the Top 100 Hotel Destinations Searched for Leisure Travel in 2016:

- 53% are for City Destinations
- 34% are for Beach Destinations
- 18% are for Theme Park Destinations

Cities and metropolitan area continue to reign supreme while beaches still garner a third of top 100 destinations. Theme parks see increased interest during the traveler planning cycle.
Leisure Travel Fun Facts
Dreaming Vs Searching Vs Booking

Of the Top 100 searched leisure destinations in 2016, 12% are for National Park destinations.

Of the Top 100 booked leisure destinations in 2016, 6% are for National Park destinations.

32% of Americans say they will enjoy one of our National Parks this year.
53% of the Top 100 searched summer destinations are for Urban/Metropolitan destinations.

29% of the Top 100 searched summer destinations are for Outdoor/Recreational destinations.

But Urban/Metropolitan destinations make up over 70% of the Top 100 booked destinations.

But Outdoor/Recreational destinations but only make up 20% of the Top 100 booked destinations.
Summer is here, and that means summer vacation.

If you’re one of the many Americans who travel in the summer months, you’re probably getting ready to pack a bag and head out of town for a few days. Based on The State of the American Traveler tourism research, travelers are more and more heavily using their mobile devices throughout the travel process. That means that we not only use our devices to start planning a trip, but also use them as we travel. Applications (or Apps) on our devices exist for every kind of need, from predicting traffic conditions to sharing selfies, and are popping up everywhere, allowing us to be more connected to the people and places around us.

In-travel-related apps, today you can even buy an international flight and set up an entire itinerary with the use of an app. Imagine what our grandparents would think if they heard that!

Can I go so far as to say that travel apps have become essential to people’s lives? To find my favorite travel apps, I started with a list of the most useful things one needs while traveling. Then I tested a large group of apps, and found the best fit for traveler needs. I’ve gathered some that will help you plan your trip and find cheap gas during your drive, and others that will give you tips and daytrip ideas for the places you’re visiting. I’ve also made a special note of apps that can be used internationally (marked with “International use” at the end of the description, or the globe icon on our accompanying graphic) or are more geared towards international travel, such as currency and language translation (towards the end of the list). I hope you find these apps as useful as I have and, as always, happy travels!
Thank You

Chris Adams
+1 303 842 3394
Chris.Adams@MilesPartnership.com
Social: KiwiColorado

Erin Francis – Cummings
+1 415 716 7983
Erin@DestinationAnalysts.com
Social: erincummings31