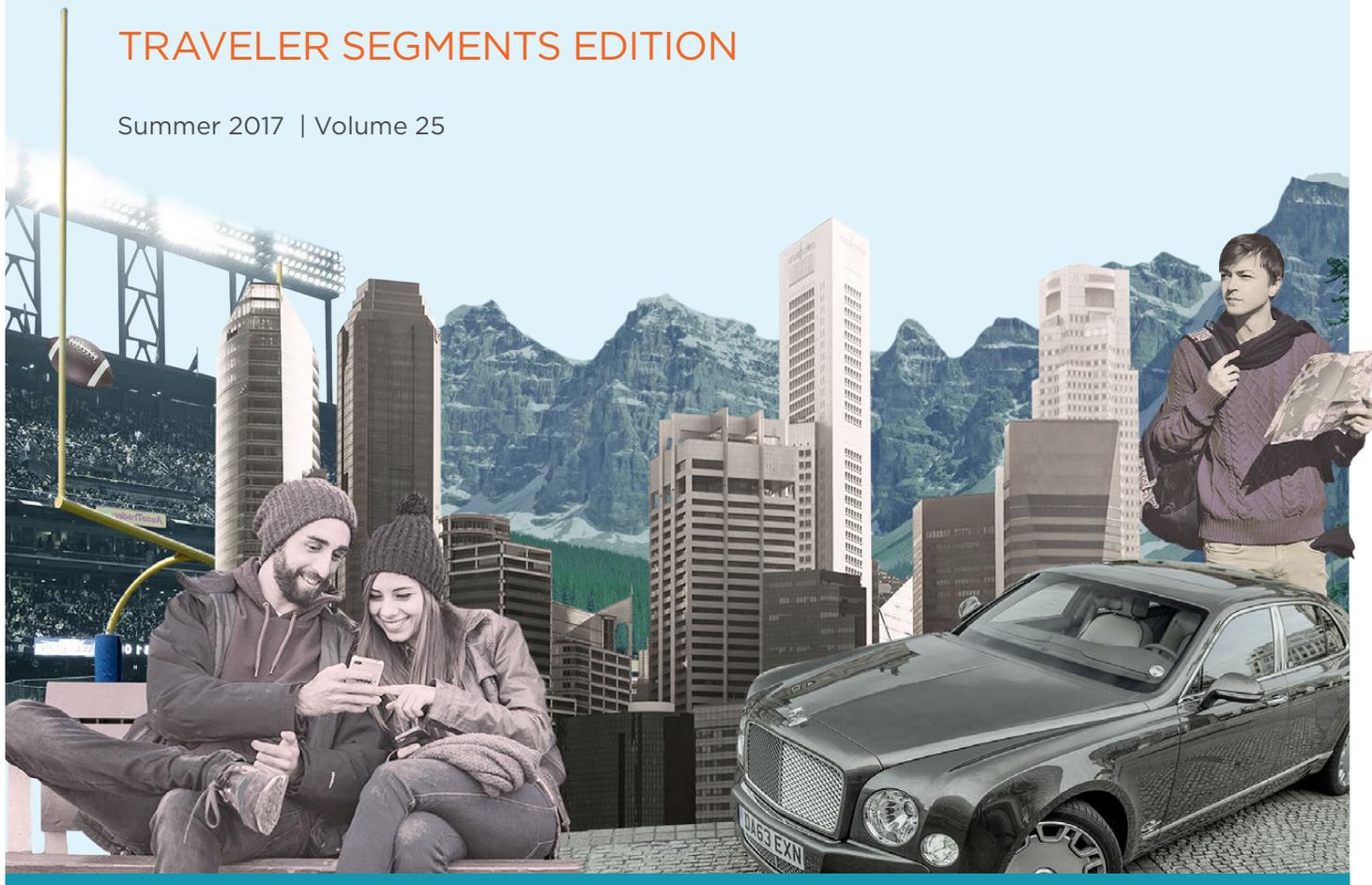


Destination Analysts'

The State of the American Traveler™

TRAVELER SEGMENTS EDITION

Summer 2017 | Volume 25



Destination  Analysts

The Traveler Segments Edition

Destination marketers always seem to be on the hunt for the latest and greatest group of high-value travelers to lure to their destination. THIS SPRING EDITION of The State of the American Traveler™ looks at traveler segments. In this edition we look at six different high profile segments, and present descriptive data to illustrate how they act, think and plan their leisure travels. For each segment, we present several key data points where the segments differ markedly from their counterpoints.

Segments examined in this edition include: Destination Marketing Organization (DMO) Content Users, Affluent Travelers, Sporting Event Travelers, Millennials, Festival & Special Event Travelers, Parks & Monument Travelers. Please enjoy. As always, if you have questions or ideas for future survey topics, we welcome you to message us: info@destinationanalysts.com or @DA_Research.

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Methodology

THE STATE OF THE AMERICAN TRAVELER SURVEY is conducted quarterly by Destination Analysts, Inc., a San Francisco-based tourism industry research company. The survey is conducted online amongst a nationally representative sample of adult Americans. From July 1st to July 7th, 2017, surveys were collected from a group of respondents who were then screened by their leisure travel behavior. Only those respondents who had traveled at least once in the past 12 months for purely leisure or personal reasons were interviewed. This travel must have been of at least 50 miles one-way — the standard distance threshold used in the tourism industry to signify that a “trip” has been taken. In total, 2,080 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.2%. This information is provided “as is” and intended for informational purposes only. It should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Destination Analysts is not responsible for your use of the information contained herein (including errors, omissions, inaccuracies or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.

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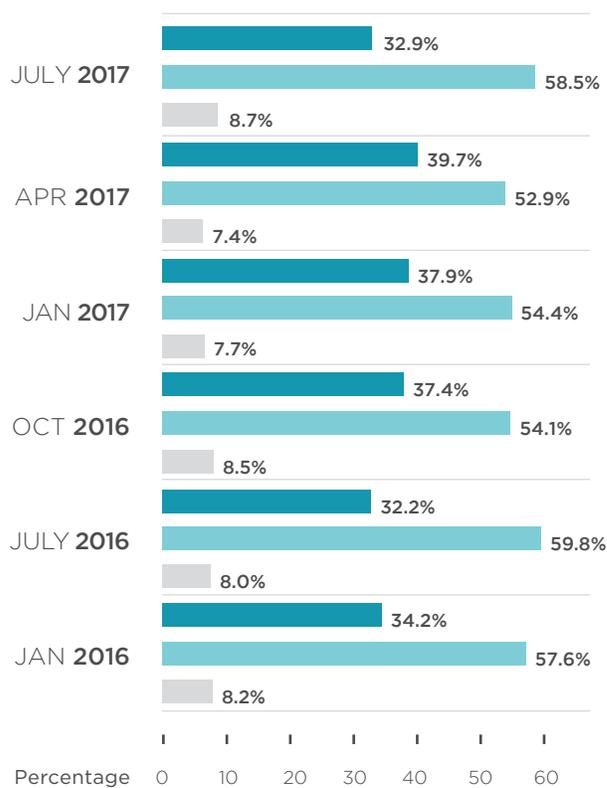
1.0 Travel Expectations & Travel Spending Expectations

AMERICAN LEISURE TRAVELERS continue to be optimistic about the amount of travel they will enjoy in the upcoming year. According to our July *The State of the American Traveler™* tracking survey, leisure

travel optimism is at the same level as last summer, with 32.9 percent of Americans planning to increase the number of trips they will take in the next 12 months. Leisure travel spending expectations are also at a high, with 34.4 percent of American travelers expecting to increase their leisure travel spending, up from 32.8 percent last summer.

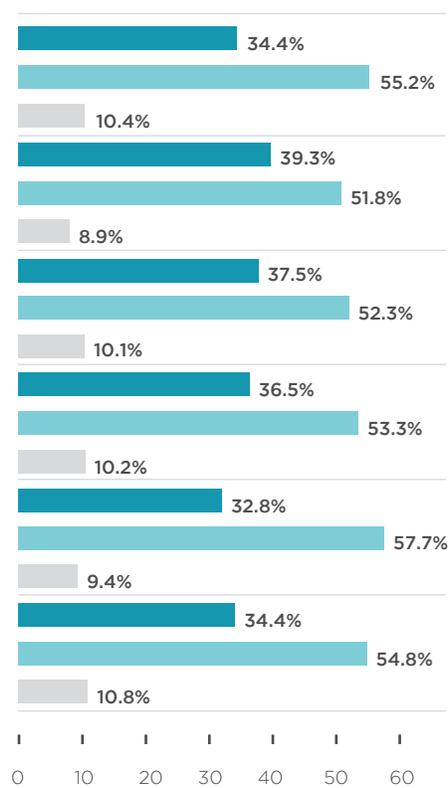
THE KEY: ■ expect more ■ expect the same ■ expect less

Travel Expectations (Trips)



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

Travel Expectations (Spending)



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

2.1

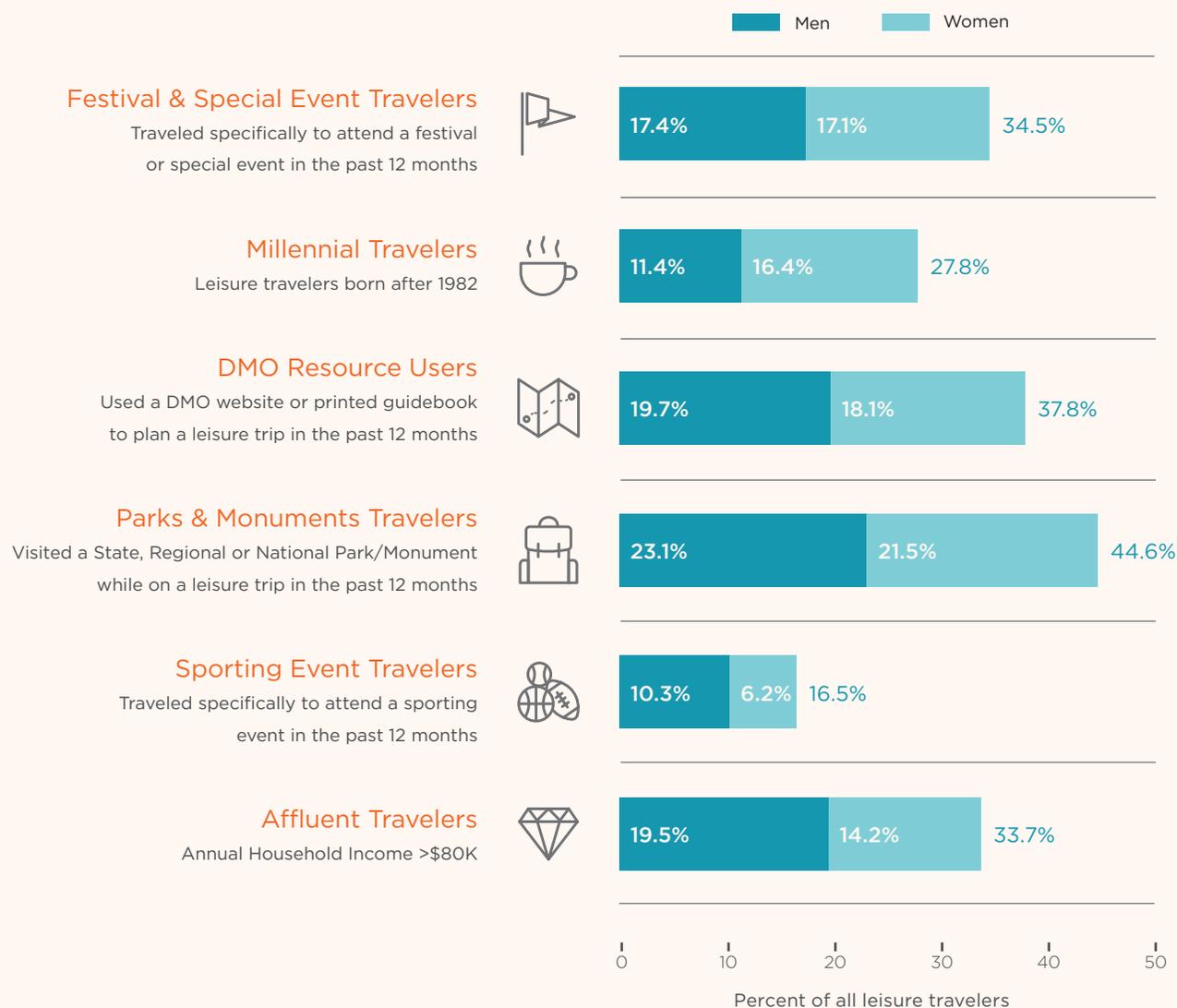
Traveler Segments

The six travel segments studied here differ in many ways. This report delivers a high level picture of six important segments that are frequently discussed by travel industry professionals. The graph below shows the relative sizes of the segments studied in this report. We see this can vary significantly, with the smallest group being

Sporting Event Travelers, which comprise only 16.5 percent of the traveling public. This segment is also primarily (63%) male. On the other hand, Parks and Monuments Travelers represent nearly half the traveling public, and is split fairly evenly between men and women.

TRAVELER SEGMENTS: RELATIVE SIZE & GENDER MIX

Understanding this graph by example: 34.5% of all US leisure travelers may be considered Festival & Special Event Travelers, a group which is almost equally divided between men and women (17.4% and 17.1% respectively).



2.2



TRAVELER SEGMENTS

Festival & Special Event Travelers

Destination marketers love a good festival or special event to draw visitors from far and wide. Travelers in this group are young, frequent travelers with a penchant for social media.



34.5%
OF LEISURE TRAVELERS

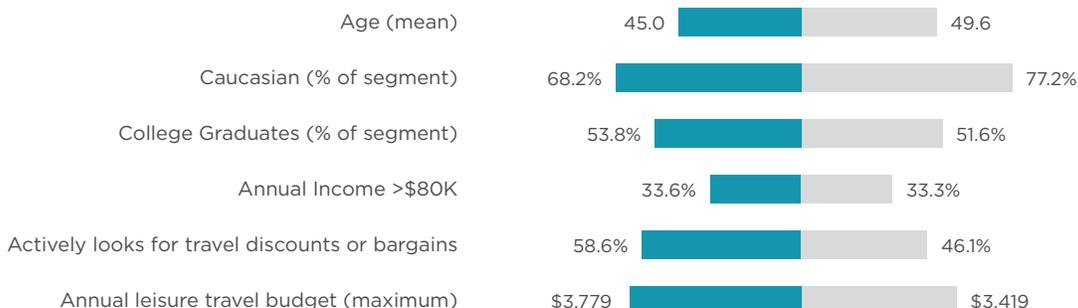
Festival & Special Event Travelers

Traveled specifically to attend a festival or special event in the past year.

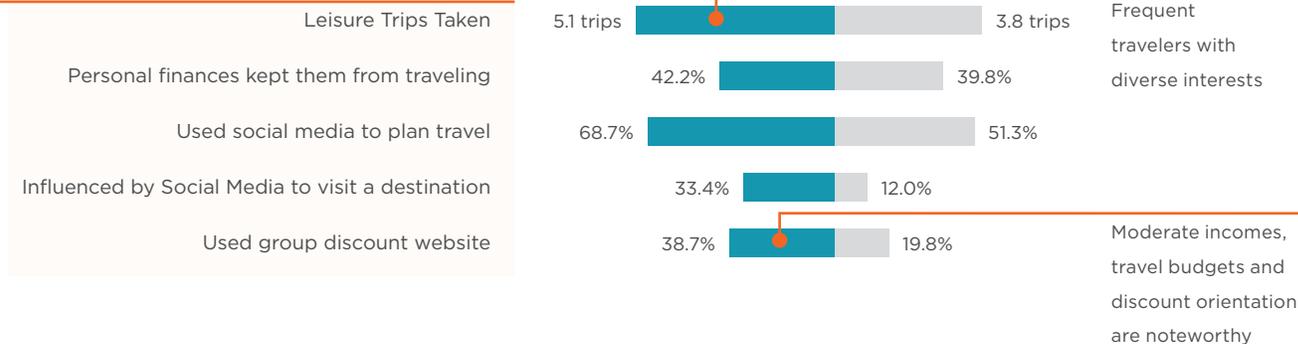
Other Travelers

Did not travel to attend a festival or special event in the past year.

KEY: Event Travelers Other Travelers

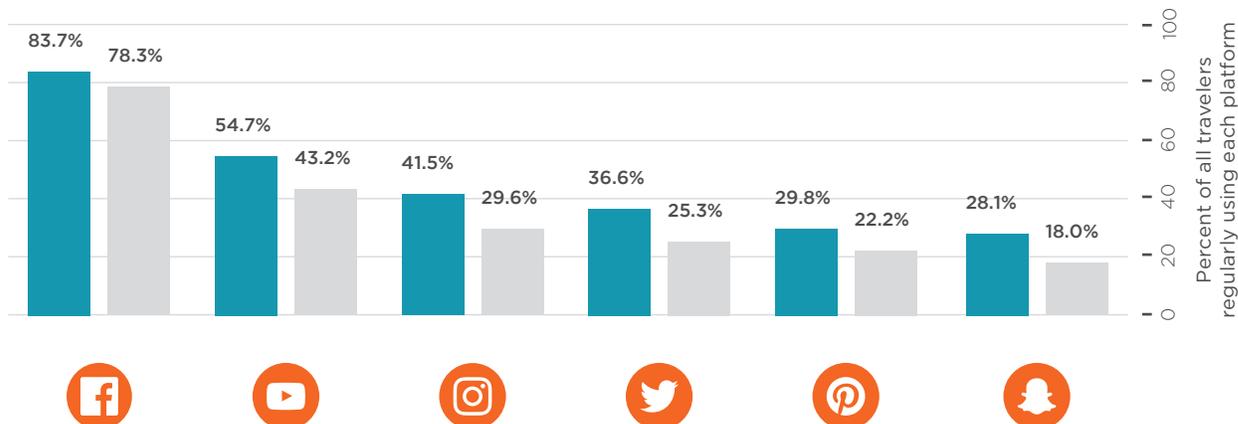


Past 12 Months



Impact & Influence

Not only do Festival & Special Event travelers more actively use social media to plan their travels, they are more likely to engage in a variety of social platforms.



2.3

TRAVELER SEGMENTS

Millennial Travelers

The most talked-about generation, Millennials account for 27.8 percent of leisure travelers and exhibit some very interesting characteristics.



27.8%
OF LEISURE TRAVELERS

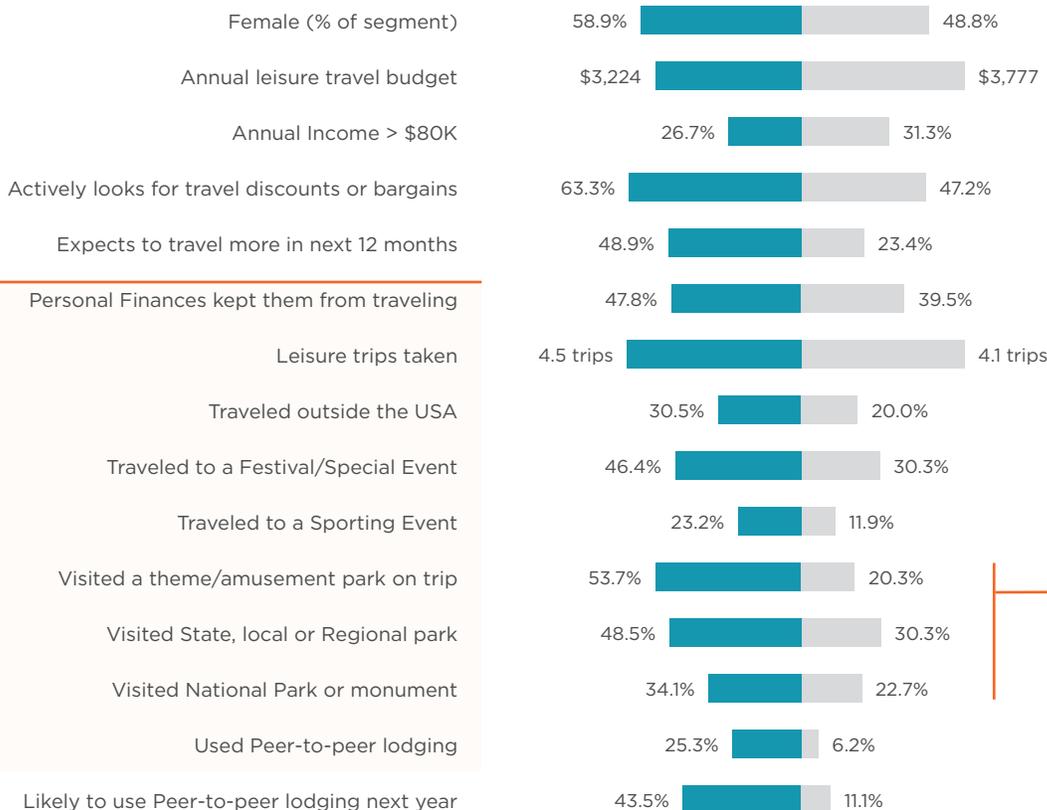
Millennial Travelers

Adult travelers born after 1982, are at most 36 years old.

Baby Boom Travelers

Travelers 53 and up, born between 1945 and 1963.

KEY: Millennial Travelers Baby Boom Travelers



Financial limitations and lower incomes inhibit this most enthusiastic of generations. Still, nearly half expect to travel more next year.

Defying stereotypes, Millennials actually visit parks more frequently than older travelers.

Dispelling the Myths

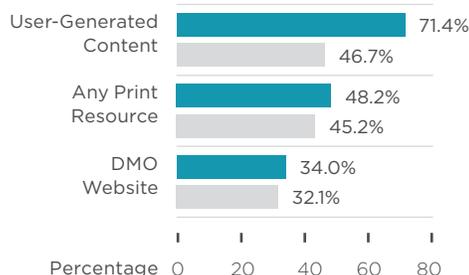
FICTION

Tech-savvy Millennial travelers rely on newer travel planning resources, and aren't interested in "old-school" print or DMO resources.

FACT

Millennials are uber-informed travelers who use all types of planning resources. In fact, they use both print and DMO websites more than their older counterparts.

Travel Planning Resources Used (past 12 months)



2.4



TRAVELER SEGMENTS

DMO Resource Users

Users of Destination Marketing Organization websites & visitors guides make up 38 percent of travelers and are affluent, frequent and experienced visitors.



37.8%
OF LEISURE TRAVELERS

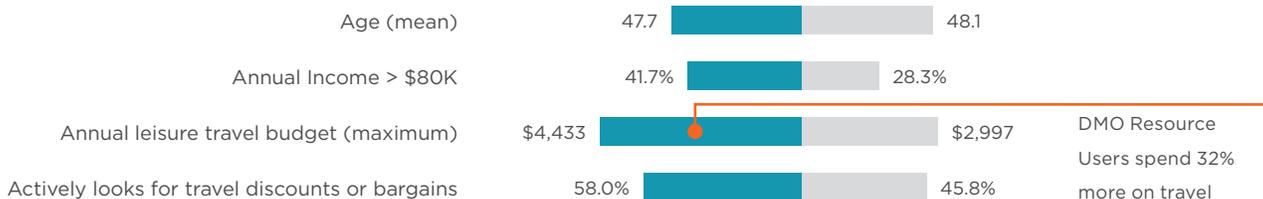
DMO Resource Users

Travelers who have used DMO websites or print resources to plan a trip in the past year.

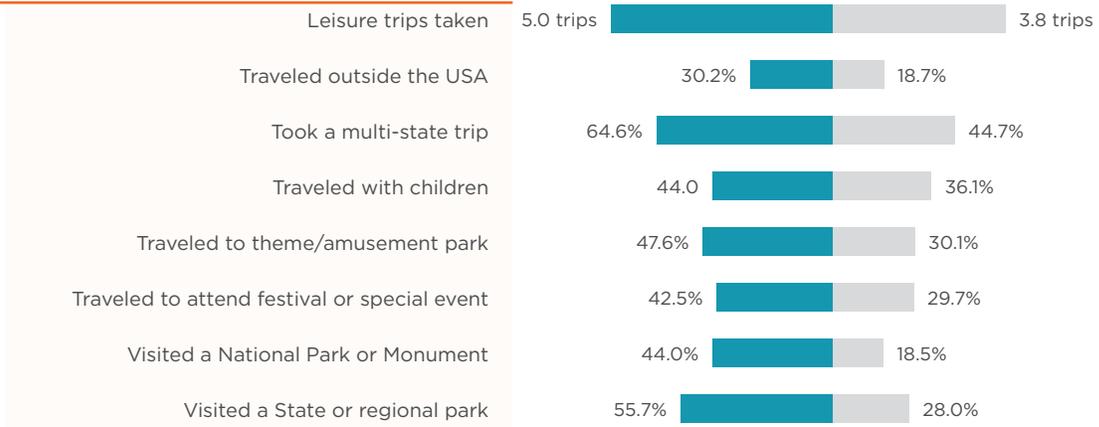
Other Travelers

Those who did not use DMO websites or print resources to plan a trip in the past year.

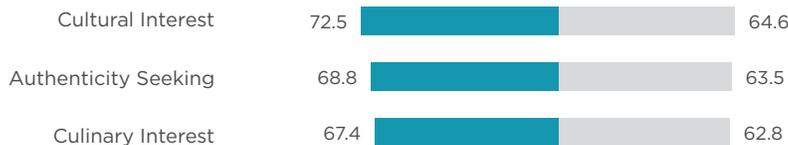
KEY: DMO Content Users Other Travelers



Past 12 Months



Traveler psychographic profile indices*



Frequent travelers with diverse interests and who desire sophisticated travel experiences.

Dispelling the Myths

FICTION

DMO resources are mostly used by older travelers. Younger travelers rely on other, newer planning resources and technologies.

FACT

The age profile of DMO Content Users is nearly identical to other travelers. Travelers of all ages use these organizations at similar levels.

* Destination Analysts' proprietary Traveler Psychographic Intensity Indices™ use a series of related seven-point scale questions to measure the strength or intensity in a traveler's feelings about aspects of leisure travel. For each psychographic category, every survey respondent is given a score of 1-100, with high scores indicating high levels of intensity or importance.

2.5



TRAVELER SEGMENTS

Parks & Monuments Travelers

America's parks offer some of the country's most diverse travel experiences. Travelers enjoying these assets form the largest segment examined in this report.



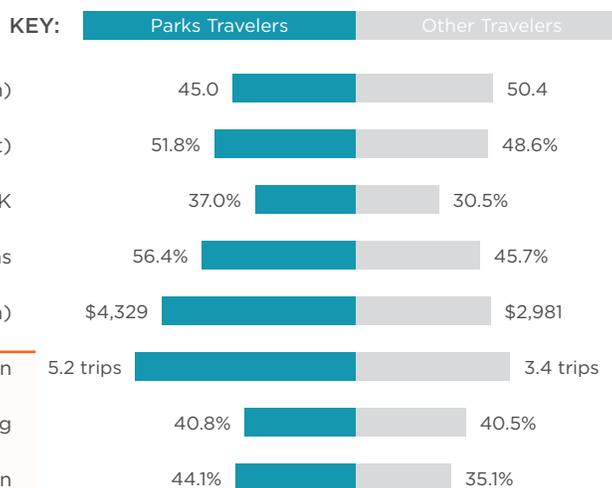
44.6%
OF LEISURE
TRAVELERS

Parks & Monuments Travelers

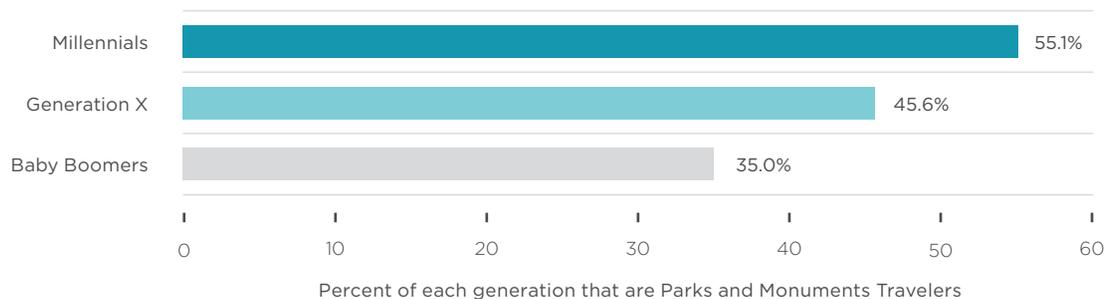
Visited a state, regional or National Park (or Monument) in the past 12 months.

Other Travelers

Did not visit any such parks or monuments while on a leisure trip in the past 12 months.



Generations and the Use of Parks



Dispelling the Myths

FICTION

Millennials require constant connectivity, so they don't visit parks and wilderness areas.

FACT

Millennials are more likely than other generations to be Parks and Monuments travelers.

FICTION

Parks & Monuments travelers are strictly outdoor enthusiasts, uninterested in urban travel experiences.

FACT

Parks & Monuments Travelers tend to enjoy both outdoor experiences and urban culture. Our Psychographic Indices show these travelers are far more interested in art and culture than other travelers.

2.6



TRAVELER SEGMENTS

Sporting Event Travelers

One of the lesser-understood segments, accounting for only 16.5 percent of the traveling population. These leisure travelers center their trip around a sporting event.



16.5%
OF LEISURE TRAVELERS

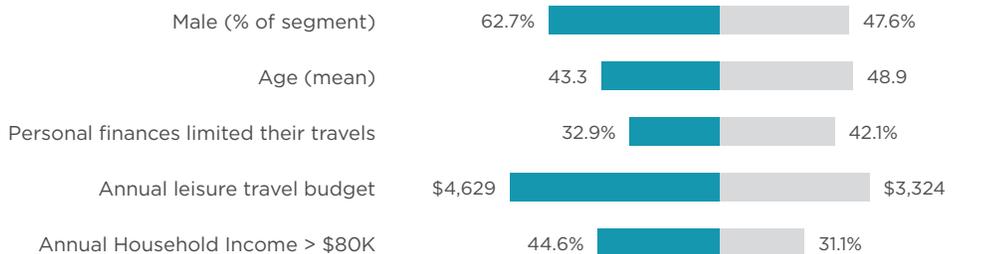
Sporting Event Travelers

Took at least one leisure trip in the past year specifically to attend a sporting event.

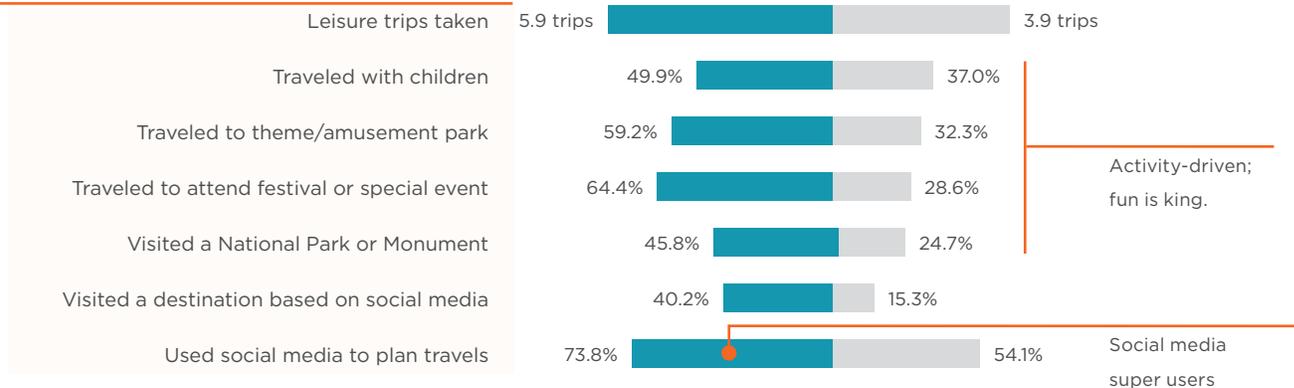
Other Travelers

Did not take a leisure trip to attend a sporting event in the past year.

KEY: Sports Travelers Other Travelers



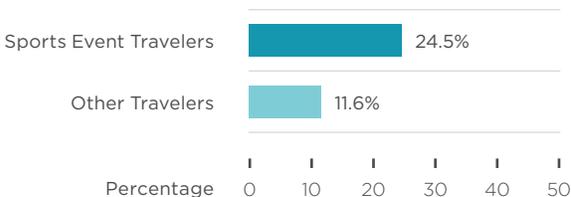
Past 12 Months



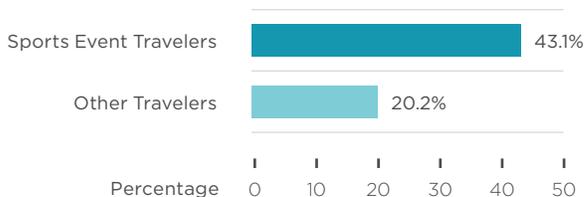
Heavy Alternative Lodging Use

Like Millennials, this younger traveling segment uses peer-to-peer lodging heavily.

Used Peer-to-Peer Lodging
(AirBnB, VRBO, etc., used in past 12 months)



Likely to Use Peer-to-Peer Lodging
(AirBnB, VRBO, etc., used in next 12 months)



2.7



TRAVELER SEGMENTS

Affluent Travelers

Everyone wants to attract affluent travelers. They've got the money to travel and do so frequently, but are still price sensitive with a serious need to disconnect.



33.7%
OF LEISURE TRAVELERS

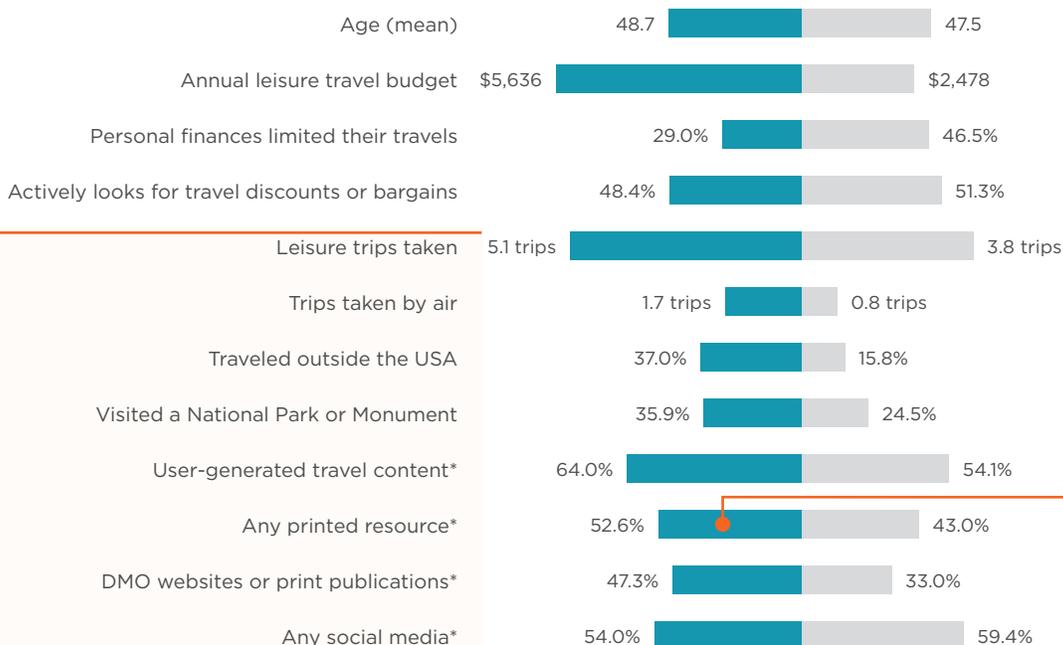
Affluent Travelers

Earn more than \$80K annually and account for about one third of the traveling public.

Other Travelers

Earn less than \$80K and represent the majority (66.3%) of American leisure travelers.

KEY: Affluent Travelers Other Travelers



Hyper-informed travelers, but lower social media use

*Travel Planning Resources Used

Dispelling the Myths

FICTION

High-powered affluent travelers require constant connectivity on their leisure trips.

FACT

On our psychographic indices, affluent travelers score lower in their need to be connected while traveling.

FICTION

Free-spending affluent travelers part with their money easily.

FACT

Not only do they actively look for discounts and bargains, affluent travelers have an identical price sensitivity profile to non-affluent travelers in our psychographic measures.