

# **ICE CREAM, DROWNING AND THE TRAVEL INDUSTRY**

**The Shifting Landscape for  
Marketing in Tourism**



# **ICE CREAM, DROWNING AND THE TRAVEL INDUSTRY**

**The Shifting Landscape for  
Marketing in Tourism**



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SWIM**

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1. Travel Demand
2. Changing and Complicated Customer Segments
3. Supplier Shifts and Market Evolution
4. Opportunities





# PORTRAIT *of* AMERICAN TRAVELERS

*2017-2018*

A black and white photograph of a man in a call center. He is wearing a headset with a microphone and glasses. He is looking at a laptop screen and has his hand on the trackpad. The background is blurred, showing other people in the office.

# TRAVEL DEMAND

**\$7.1 TRILLION  
BY 2020**





**\$513**

# UK faces Brexit crisis as Europe's leaders demand: 'Get out now!'

France and Germany urge swift Brexit  
Boris Johnson set to announce lead

By [Author Name]

**NEW YORK POST** Just a Buck!  
LATE CITY FINAL

By ALAIN SHERTER / MONEYWATCH August 2, 2016, 5:00 AM

# Let's face it – the U.S. economy is going nowhere

# Qatar told to close Al Jazeera, reduce Iran ties in list of demands

By Tamara Oiblawi and Larry Register, CNN  
Updated 11:57 AM ET, Thu July 27, 2017

Top stories:  
Boy with heart transplant dies on first day of school  
US Navy 7th Fleet commander dismissed, Navy says

Education

# U.S. Travel Growth Is Slowing Due to Internat

Travel Services • Corporate Travel

# The Russians are coming! Or maybe the media's just crying wolf...

BY JOHN KUSHIMA, OPINION CONTRIBUTOR · 01/13/17 06:40 PM EST

185 SHARES

SHARE (185) TWEET PLUS ONE

# Why 2017 will be the worst year ever

Home > Security

# Tourism industry debating ir of Trump travel ban

By BETH J. HARRPAZ Feb. 8, 2017 3:43 PM EST

NEW YORK (AP) — President Donald Trump's travel ban is not only in the courts, it's also being debated by the travel industry.

Many experts remain bullish about prospects for tourism, despite a that makes the U.S. expensive for some international travelers. The Department predicts a record 78.6 million international visitors will visit in 2017.

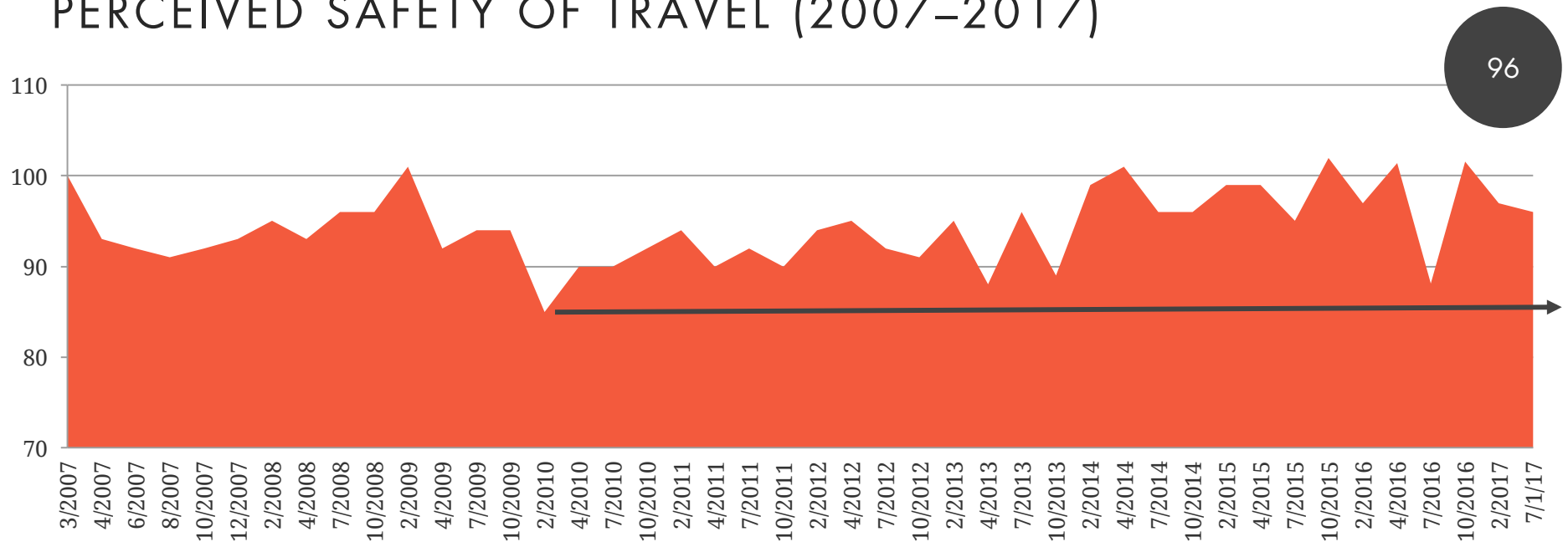
Brand USA, which promotes travel to the U.S., said it has "not seen" that shows any tangible change in bookings or cancellations by international travelers.

But others worry that Trump's order banning travelers from Iran, Iraq, Somalia, Sudan, Syria and Yemen may scare off visitors from elsewhere.



RESEARCH

# THE TRAVELER SENTIMENT INDEX™: PERCEIVED SAFETY OF TRAVEL (2007-2017)



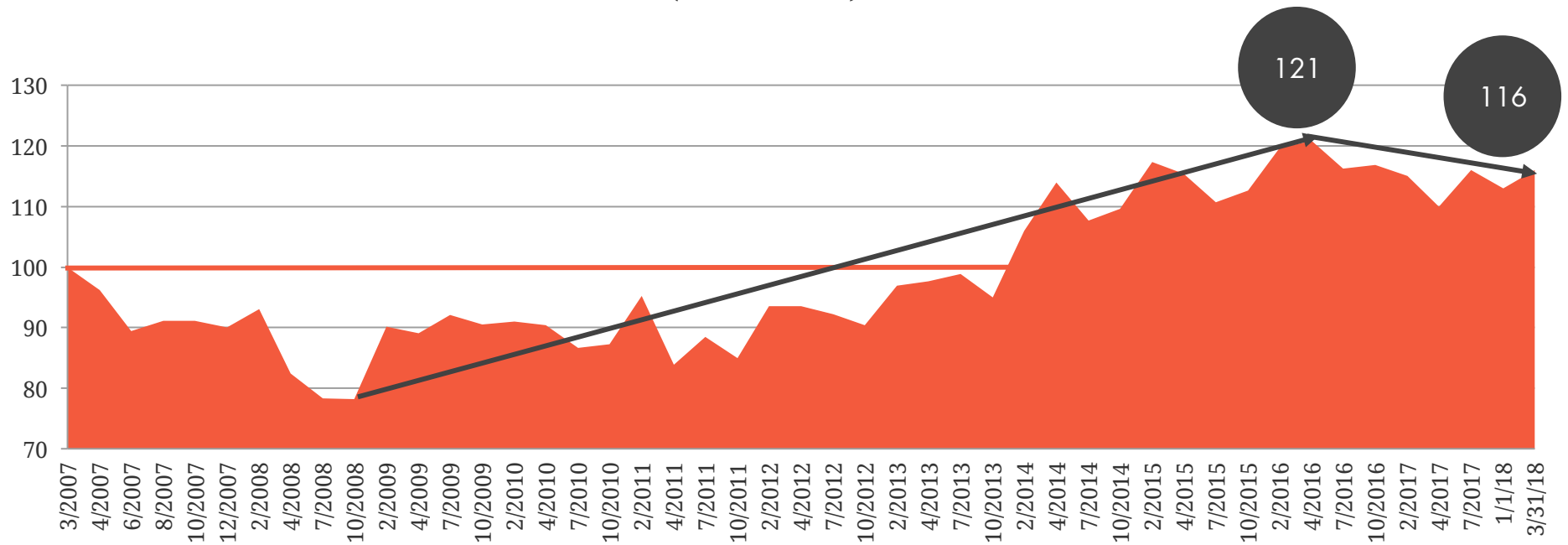


LONGER-TERM FORECAST:  
**LEISURE SLOWDOWN,  
COMMERICAL STRENGTH,  
TENUOUS INT'L IN-BOUND**



# LEISURE TRAVELER SENTIMENT INDEX™

(2007 – 2017)



Source: MMGY Global travelhorizons™

VALUE AND PRICE ARE GROWING AS DETERMINENT

29%

of domestic U.S. vacations  
in Q1 and Q2 were  
influenced by low airfares

Source: 2017 MMGY Global *Portrait of American Travelers*

BUSINESS INTENT TO TRAVEL DOMESTICALLY  
IN THE NEXT 12 MONTHS

32%

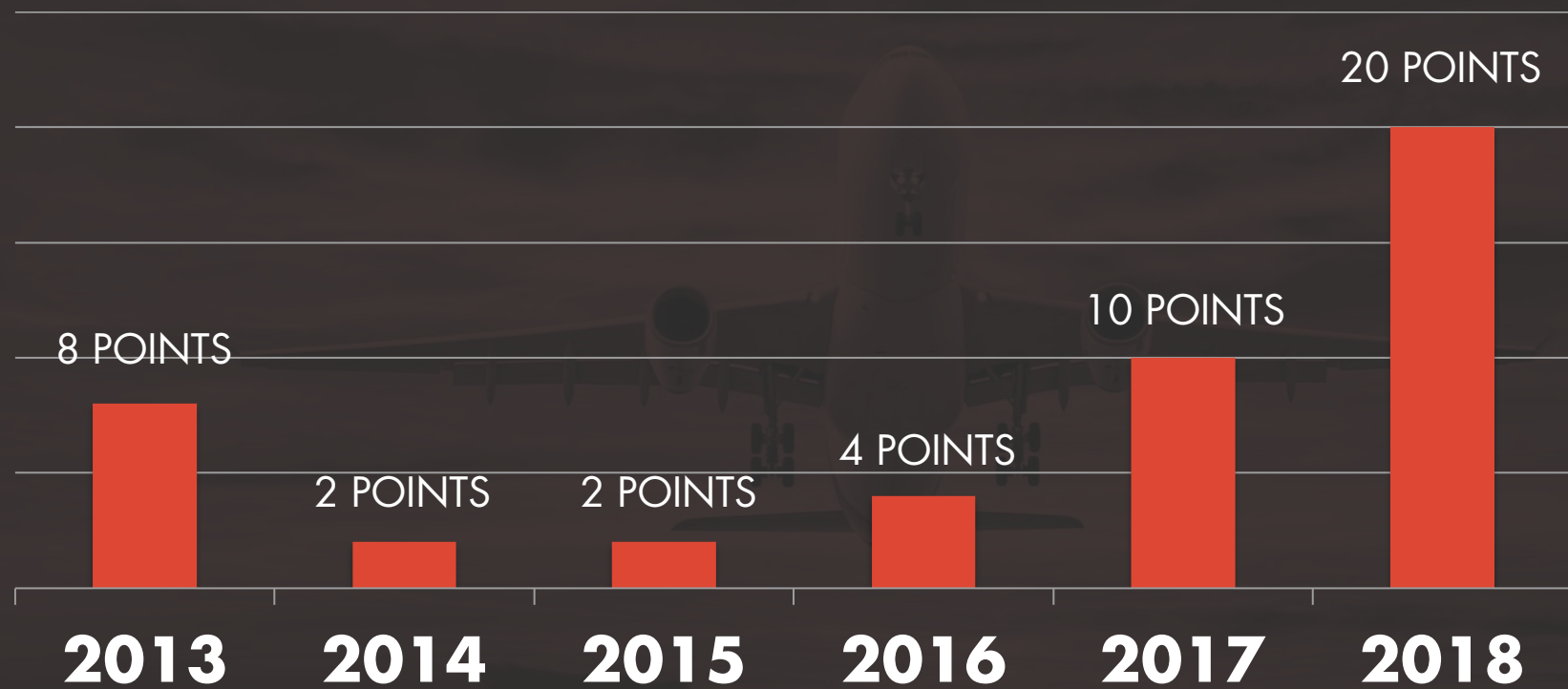
PLAN TO TAKE MORE TRIPS

12%

PLAN TO TAKE FEWER TRIPS

Source: 2017 MMGY Global *Portrait of American Travelers*

# NET OVERALL VARIANCE IN FUTURE BUSINESS INTENT



Source: 2017 MMGY Global *Portrait of American Travelers*

## 2018 CONVENTIONS AND MEETINGS

**4%**  
**INCREASE**

Source: AMERICAN EXPRESS GLOBAL MEETINGS FORECAST



## MIXED INDICATORS


**3.7%**

Increase in August YOY  
International In-Bound

**3 OF LAST 6  
MONTHS**

International In-Bound  
has Dropped

Source: 2017 MMGY Global *Portrait of American Travelers and USTA*



**THE INDUSTRY  
NEEDS TO BETTER  
UNDERSTAND  
TRAVELERS.**





# The malignant myth of the Millennial

William Cummings, USA TODAY Published 6:43 p.m. ET May 11, 2017 | Updated 8:51 p.m. ET May 11, 2017

f 3119

t

in 216

52

“...differences can be born out of an individual's place in the life cycle — whether a young adult, middle-aged parent or retiree rather than anything unique about that person's generation.”

Baby Boomers: your millennial children are worse-off than you. Millennials earn 20 percent less than boomers did at the same stage of life, despite being better educated, according to a new analysis by the advocacy group Young Invincibles. (Jan. 13) AP



f 3119  
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# Infographic: Marketers Are Spending 500% More on Millennials Than All Others Combined

## Data from Turn breaks down Gen Y into 4 groups

By Marty Swant

- Facebook: 567
- Twitter: 0
- LinkedIn: 779
- Reddit: 16
- StumbleUpon: 1
- Comments: 5
- Email
- Print

November 17, 2015, 1:41 PM EST Technology



Advertisement

OMNI HOTELS & RESORTS

THE SEARCH FOR THE





**84%**

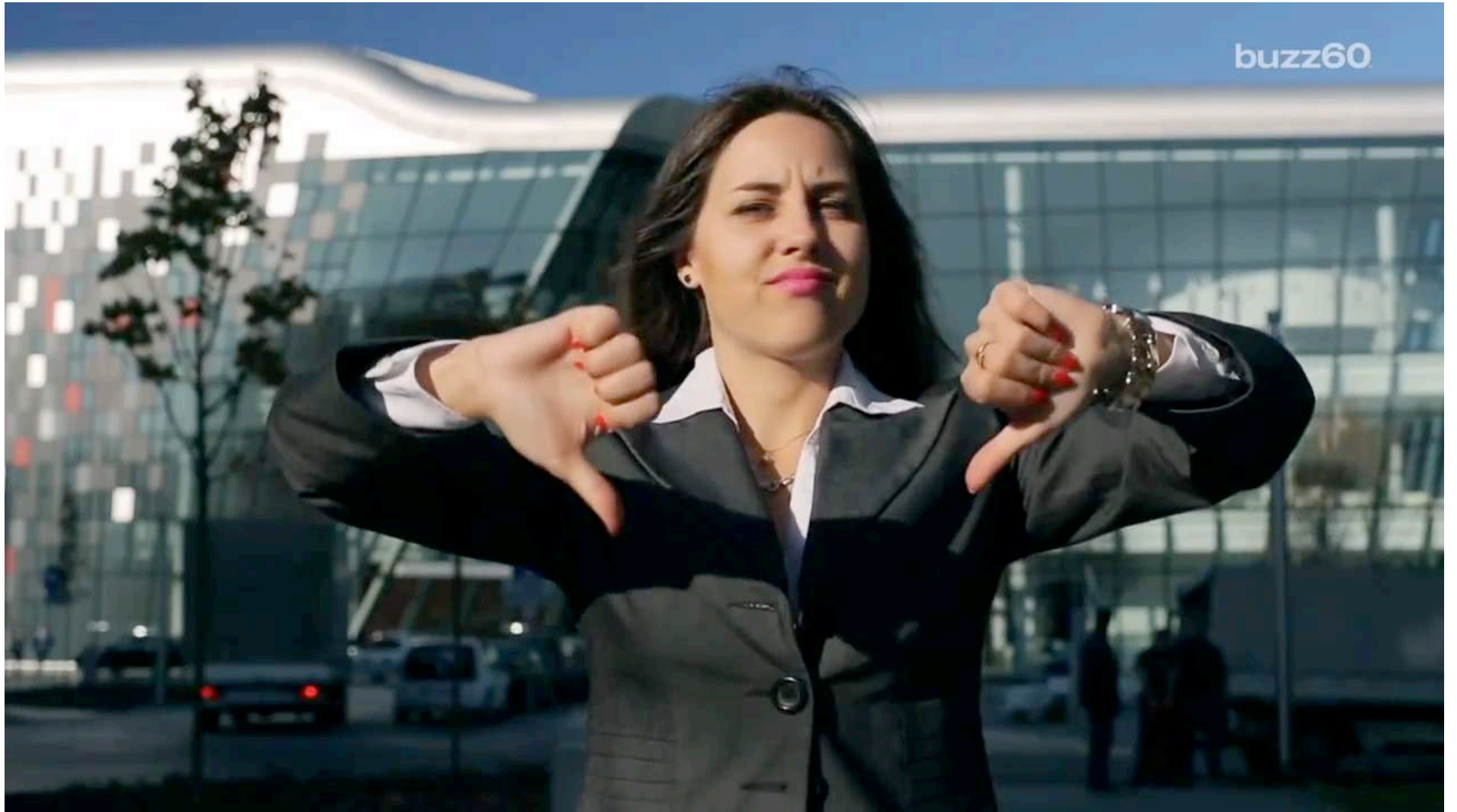
of consumers consider  
vacations their #1 priority  
for discretionary spending



**JUST WHO ARE  
THESE MILLENNIALS?**



buzz60





**83.1**

**MILLION  
MILLENNIALS**



**1/4 OF U.S.  
POPULATION**





Generation 2





EARLY STAGE  
*Young, Investigative,  
Moving Target, Unsure.*

FIGURING IT OUT  
*Starting to Follow Patterns, Finding  
Direction, Establish and  
Influencing Tastes.*





FOUNDATIONAL  
*Rooted, Predictable, Attached to  
Affinities.*

COMING FULL CIRCLE  
*Redefining Mature, Investigative  
Real Time To Explore.*



**WITHIN THESE CYCLES,  
THERE ARE ODD BUT  
INTERESTING PATTERNS**















A dark, grayscale image of a group of people, possibly travelers, with the text overlaid. The image is mostly black with some faint, lighter areas suggesting the presence of people. The text is white and bold, centered in the middle of the image.

**NOT ALL TRAVELERS  
ARE CREATED EQUAL**



SPECIFIC TRAVELER SEGMENTS

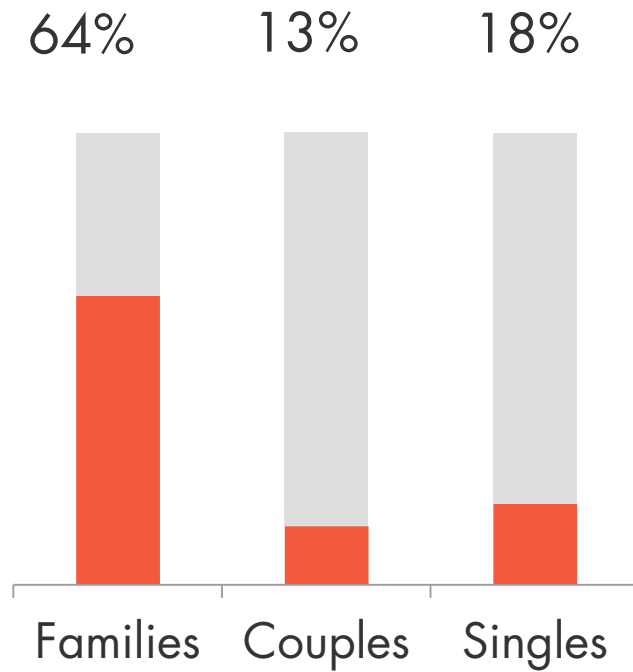


**H**igh  
**E**arners  
**N**ot  
**R**ich  
**Y**et



## SPECIFIC TRAVELER SEGMENTS

### HENRYs DEMO PROFILE



**31**

**Average Age**

**\$350k**

**Average Income**

SPECIFIC TRAVELER SEGMENTS



**Y**oung  
**A**t  
**H**eat  
**T**ravelers  
**Z**ooming  
**E**verywhere  
**E**nthusiastically

## YAHTZEEs DEMO PROFILE

- » Active Retirees Between Ages 55 and 75
- » Have Taken 3+ Vacations in Past 12 Months
- » 12.1M Households in U.S.
- » Will be 12% of U.S. travelers by 2020





**M**ountain  
**A**ficionados  
**V**acationing  
**E**verywhere  
**N**atural



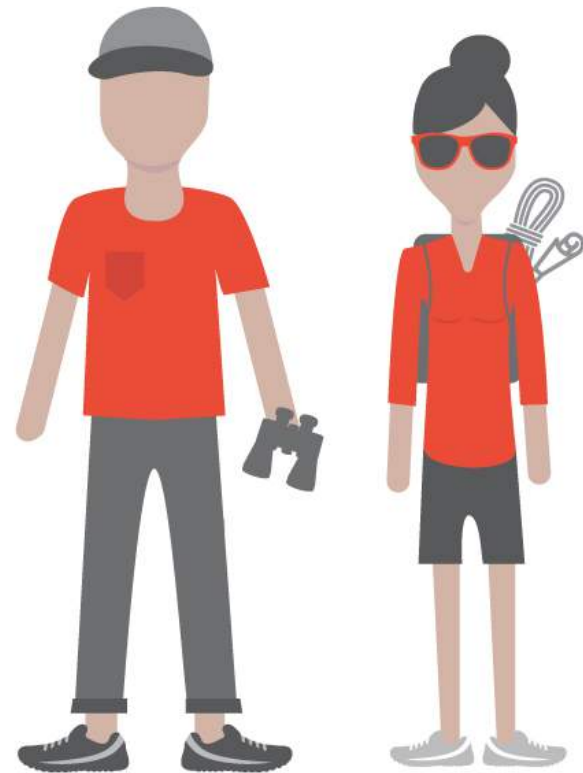
100% Are driven by both Mountain and City experiences

97% Want to hike, climb, ski, fish or see wildlife and scenery

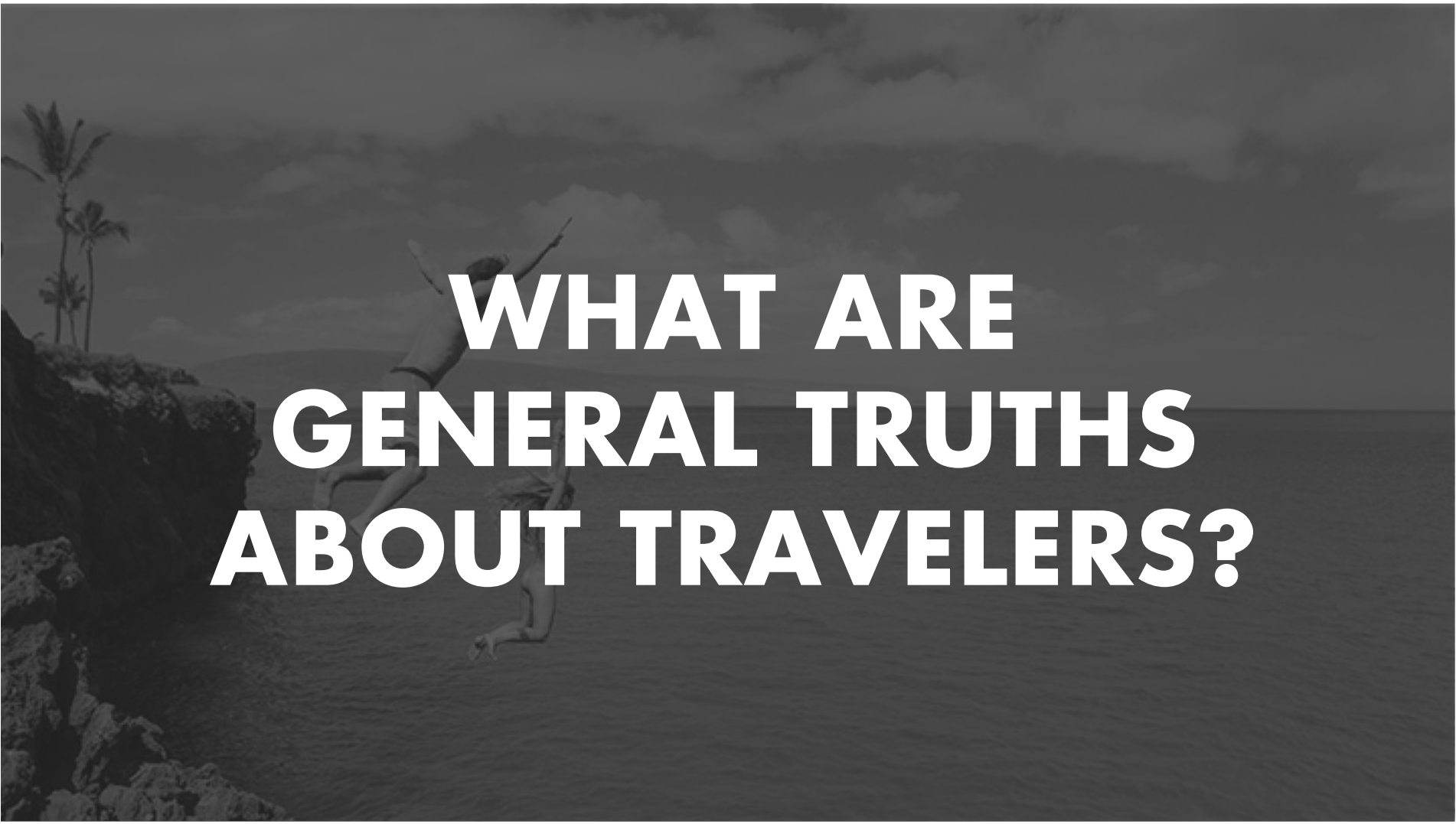
89% Seek cultural experiences such as museums and architecture

2X Spending on hotels, food & beverage and retail

138 index to travel more and spend more on leisure travel



**MAVENS**

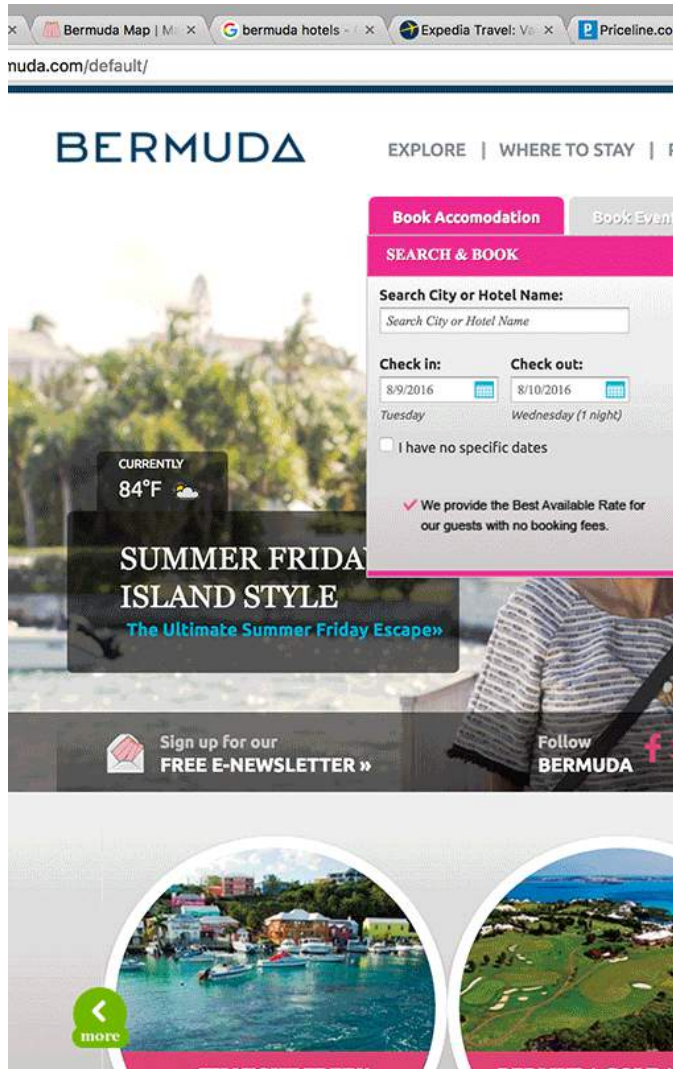


**WHAT ARE  
GENERAL TRUTHS  
ABOUT TRAVELERS?**



*Travelers Will:*

**USE TRAVEL  
AS SOCIAL  
BRAND  
CURRENCY.**



*Travelers Will:*

**MAKE TRAVEL  
PLANNING  
INTENTIONALLY  
FRENETIC.**





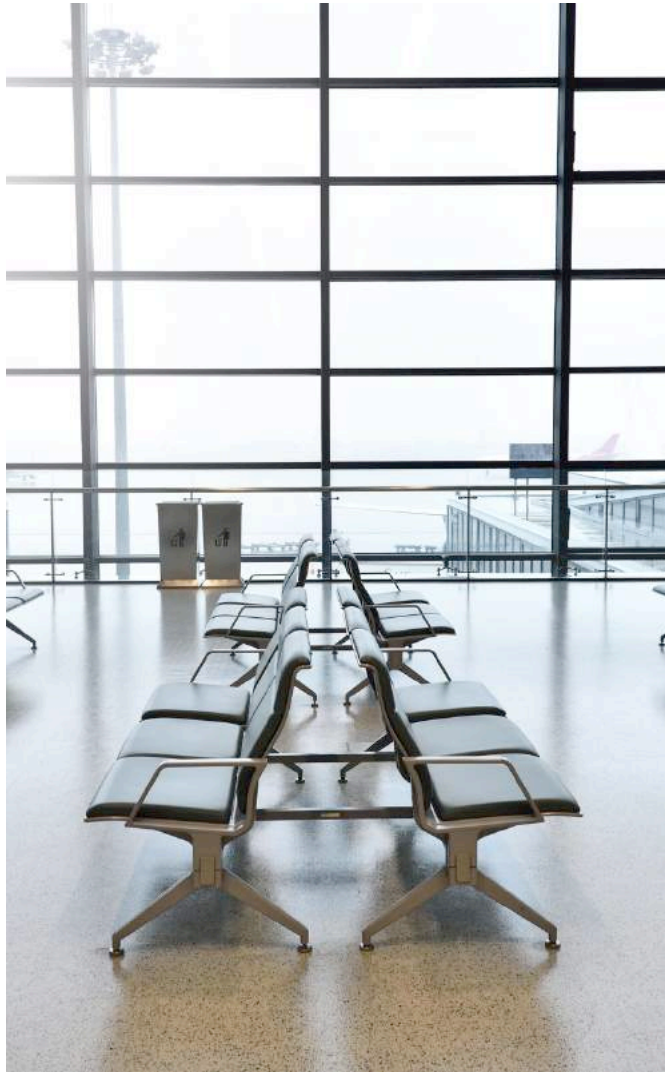
*Travelers Will:*

**DREAM  
ABOUT ONE  
DESTINATION.  
AND GO TO  
ANOTHER.**



*Travelers Will:*

**CONSIDER  
OPINIONS OF  
TRAVEL  
AGENTS.**



*Travelers Will:*

**CHANGE  
PLANS BASED  
ON TERRORISM  
AND DISEASE.**



# IDENTIFYING OPPORTUNITITES





OPPORTUNITY:  
**MILLENNIAL FAMILIES**

## MILLENNIAL FAMILIES



9.5 million households  
36.9 million vacations  
\$50.4 billion in travel spend



## LEISURE TRAVEL EXPENDITURES

### MILLENNIAL FAMILIES LEAD THE WAY

AVG. VACATION SPEND PER HOUSEHOLD	MILLENNIAL FAMILIES	MILLENNIAL COUPLES	MILLENNIAL SINGLES
PAST 12 MONTHS	\$5,295	\$4,237	\$3,688
NEXT 12 MONTHS	\$6,282	\$3,899	\$3,344
DIFFERENCE (%)	19%	(8%)	(10%)





MILLENNIAL FAMILIES REMAIN OPTIMISTIC  
DESPITE PERCEIVED INSTABILITY

**83%**

OPTIMISTIC ABOUT  
MY OWN FUTURE

**82%**

OPTIMISTIC ABOUT THE  
FUTURE OF MY JOB

**65%**

OPTIMISTIC ABOUT THE  
FUTURE OF AMERICA

Source: 2017 MMGY *Global Portrait of American Travelers*





OPPORTUNITY:  
**BLEISURE**

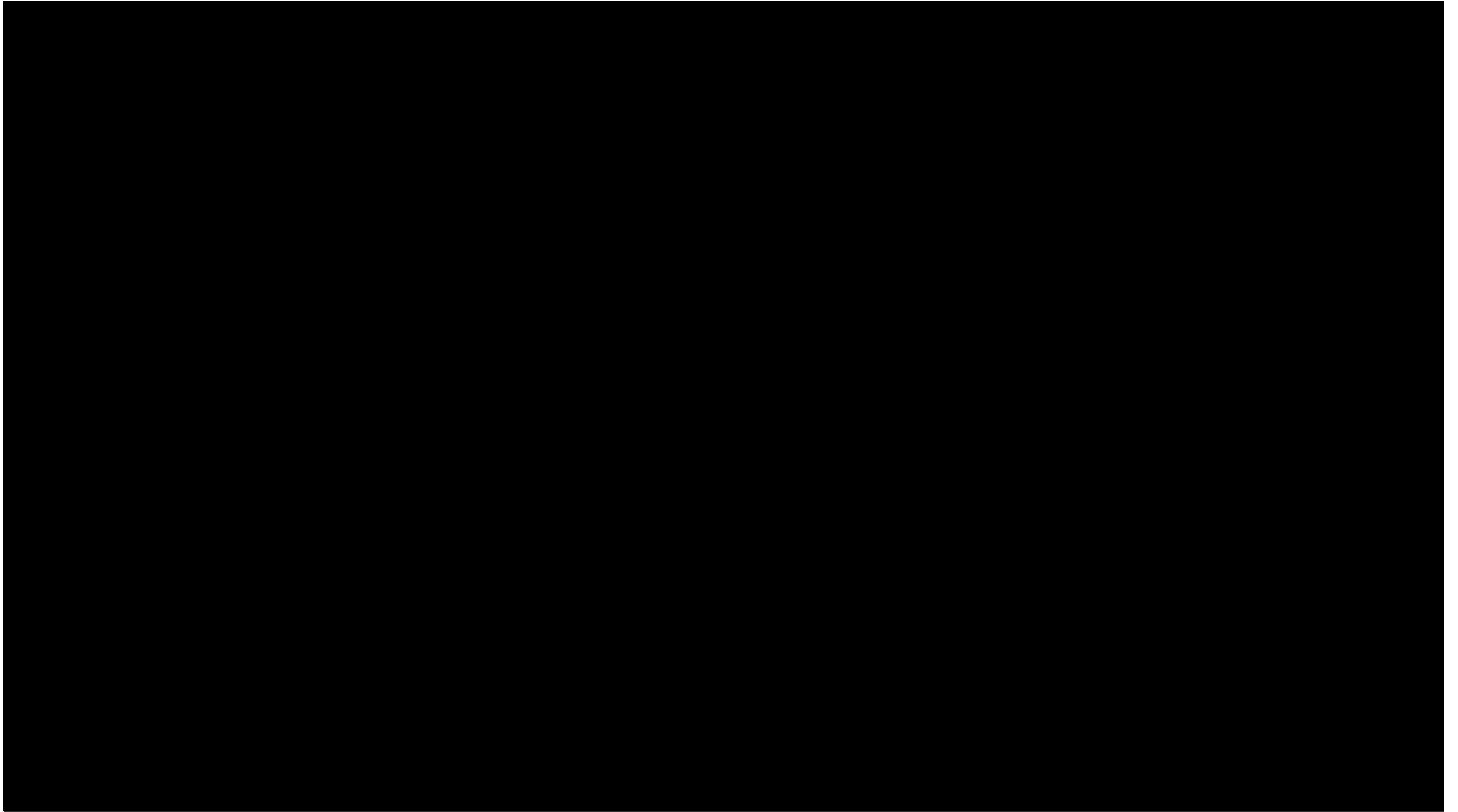


**58%**

Business travelers who say they will make plans for leisure activities and bring others to the destination while traveling for business.

*2016 MMGY Global Portrait of Business Travelers*







**24%**

Business travelers who admit to scheduling a meeting around their leisure travel plans.

*2016 MMGY Global Portrait of Business Travelers*

**LEISURNNESS?**



OPPORTUNITY:  
**EMBRACE DISRUPTORS**



LOVE  
HOME  
swap

amazon



Google   
Travel



  
Admiral

 lola

twitch

#netflix

# Netflix Is Streamed More Than Hulu, YouTube And Amazon Combined, But Game Streaming Content Beats Them All

July 6, 2017 at 15:59PM

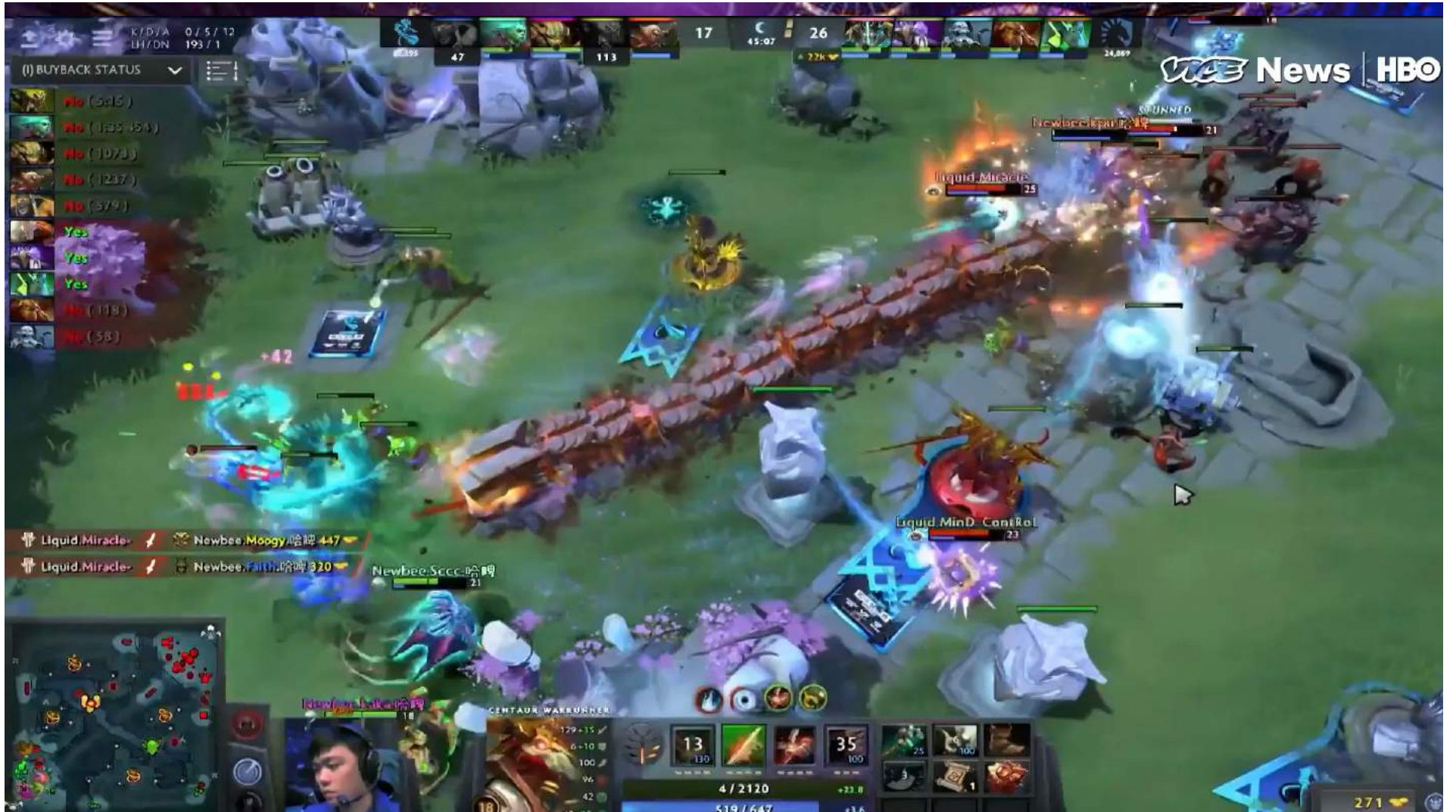


[Credit: Pixabay]

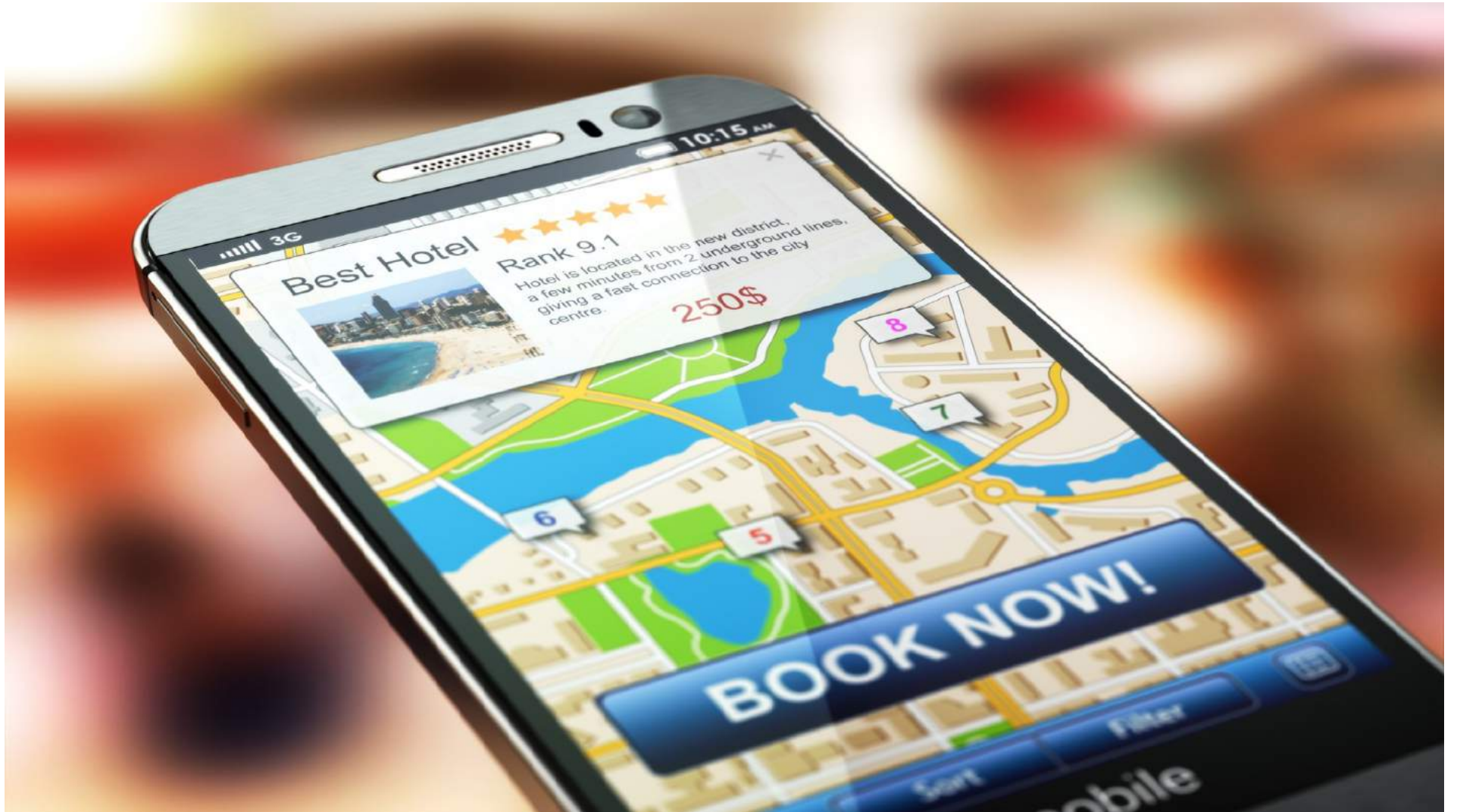














**2 IN 3**

MINUTES OF DIGITAL CONSUMPTION

**1 BILLION**

LOCATION POINTS PER MONTH

Source: 2017 MMGY Global *Portrait of American Travelers*

# The Rise of Mobile Booking in Travel

SKIFT REPORT #5  
2013



amazon echo



FROM: AMAZON.COM







**WHICH BRINGS US TO  
THE KING OF TRAVEL  
DISRUPTION**

Will my children follow in my footsteps?

Or create their own path?



2017 Disruptor 50 full coverage

Start Over | 1-5 of 50



# 1. Airbnb

It's a \$31 billion trip



Founders: Brian Chesky (CEO), Nathan Blecharczyk, Joe Gebbia

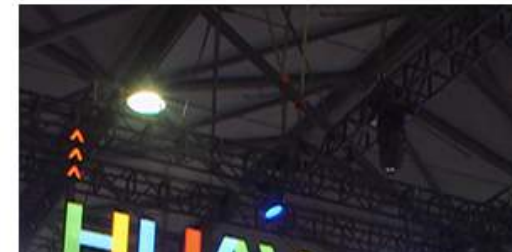
Launched: 2008

Funding: \$4.4 billion (PitchBook)

Valuation: \$31 billion (PitchBook)

Disrupting: Hotels, travel

Rival: Hotels, HomeAway








# Welcome! How can we help?

 Search for anything (booking a place, getting paid, reviews)

## Help Center

- Getting Started
- Account & Profile
- Hosting
- Traveling
- Reviews
- Business Travel
- Trust & Safety
- Taxes
- Community
- Policies
- Feedback

## Suggested for You

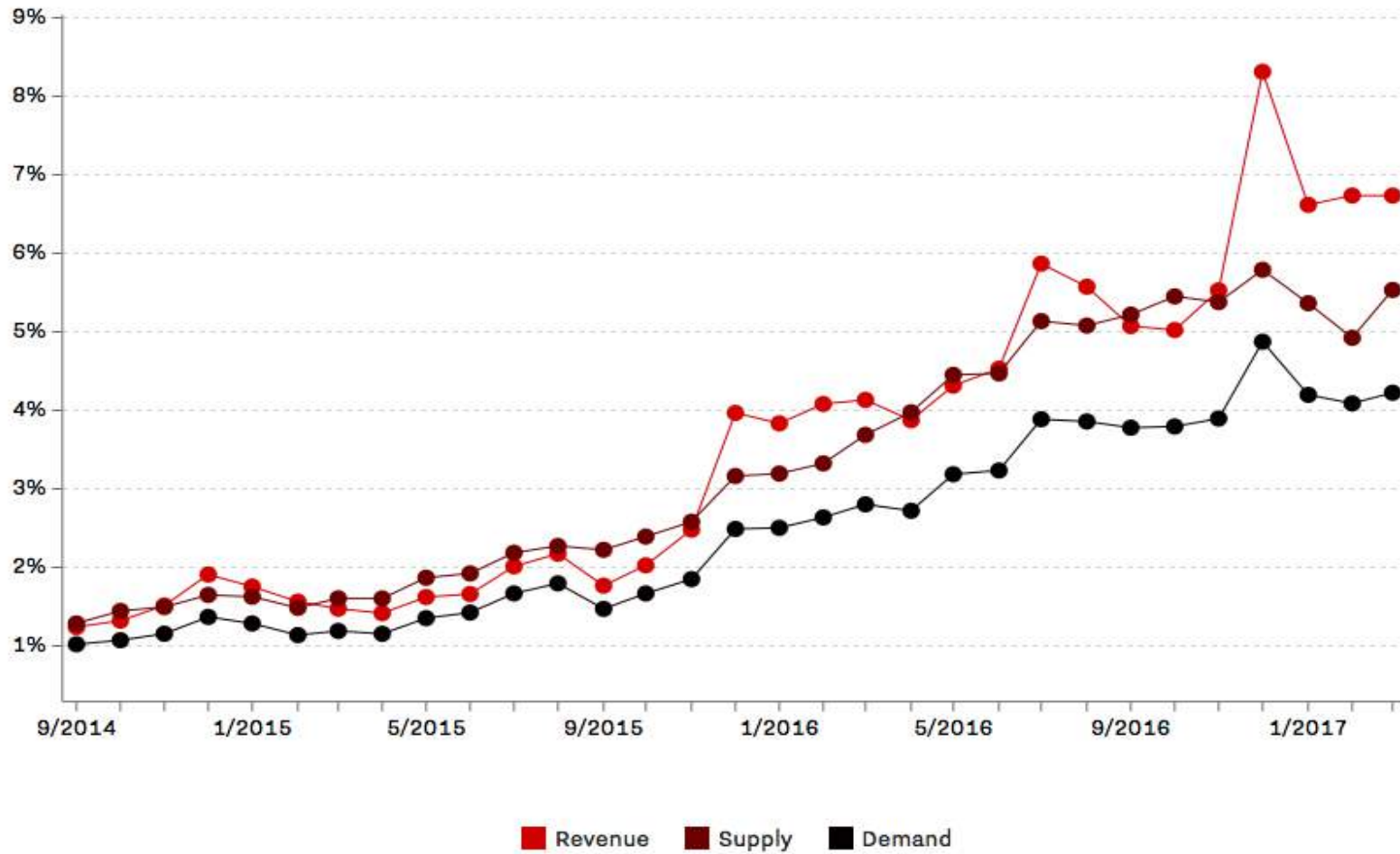
-  [Can I change a reservation as a host?](#)
-  [How does Airbnb process payments?](#)
-  [How is the price determined for my reservation?](#)
-  [What is the Airbnb cancellation policy?](#)
-  [What is Verified ID?](#)

**4 MILLION**





# Airbnb in the U.S. as a share of the U.S. hotel industry



## Booking.com Could Narrow the Gap In Vacation Rentals



Booking.com has long experimented with vacation rental inventory. Its inventory has been growing rapidly, but vacation rentals still remain a small part of Booking.com's business.



But is there scale? Business travelers intent to use shared lodging

**8%**

**Matures**

**12%**

**GenXers**

**16%**

**Boomers**

**21%**

**Millennials**

*Source: 2017 MMGY Global Portrait of American Travelers®*



**OPPORTUNITY:  
RE-THINK LOYALTY  
AND BRAND**



CONSUMER



PURCHASE

**34**



**8.5**



starwood  
Hotels and  
Resorts



# Costanza Wallet Syndrome





MOTIVATING BEHAVIORS OR ADDICTION TO OUR PHONES?

60  
MINUTES








**IF YOU DON'T OWN YOUR BRAND,**

**OTHERS WILL**

# SEA OF SAMENESS








**LIVE YOUR *Dreams***

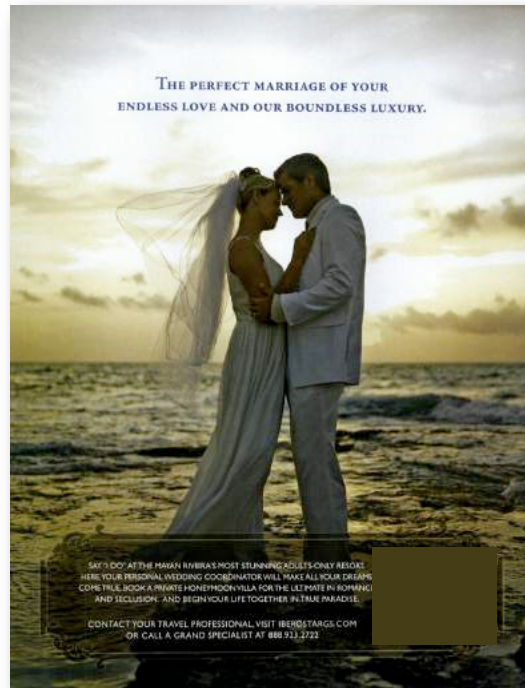
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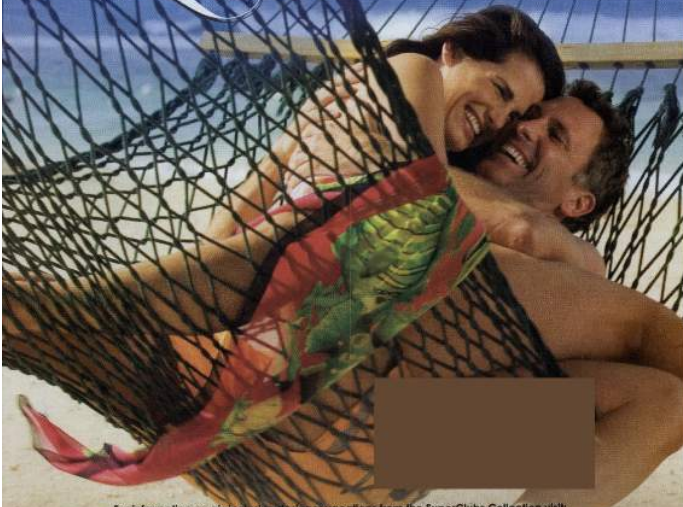
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 on the island of Paradise Island

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 1-800-241-1828 (for calls from the US)  
 1-649-946-4970 (for calls from outside the US)





# Casper





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Simone de Rochefort  
@doorniquassar

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The Casper has LANDED. Unboxing video will go up Thursday with the new episode of @\_RocketFM!



7:40 PM - 5 Jul 2016

1 Retweet 12 Likes



Jonathon Triest  
@jtriest

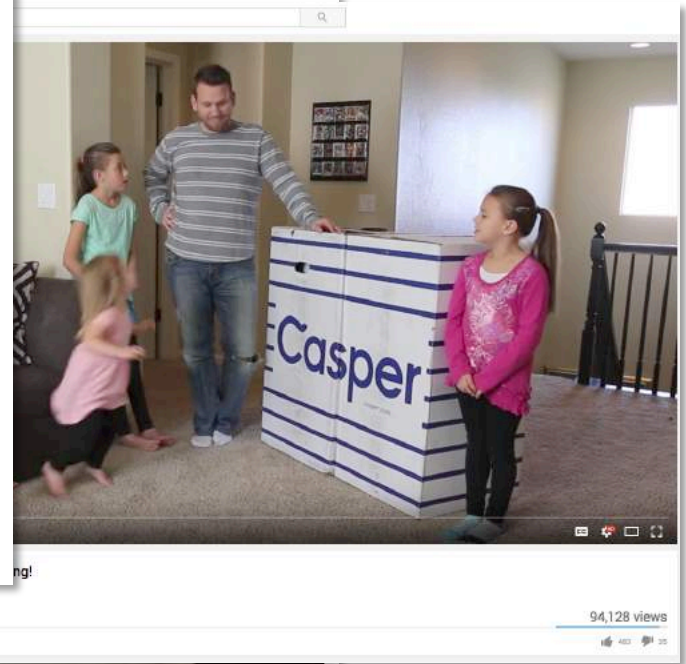
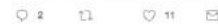
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Only @Casper can make unboxing pillows fun.



2:22 PM - 24 Dec 2015

11 Likes



94,128 views



Casper Mattress by Slumber

Mattress

107,029 views



# 70%

of all consumers

Are more likely to buy after seeing a relatable consumer generated image online





**SAMBA TV**



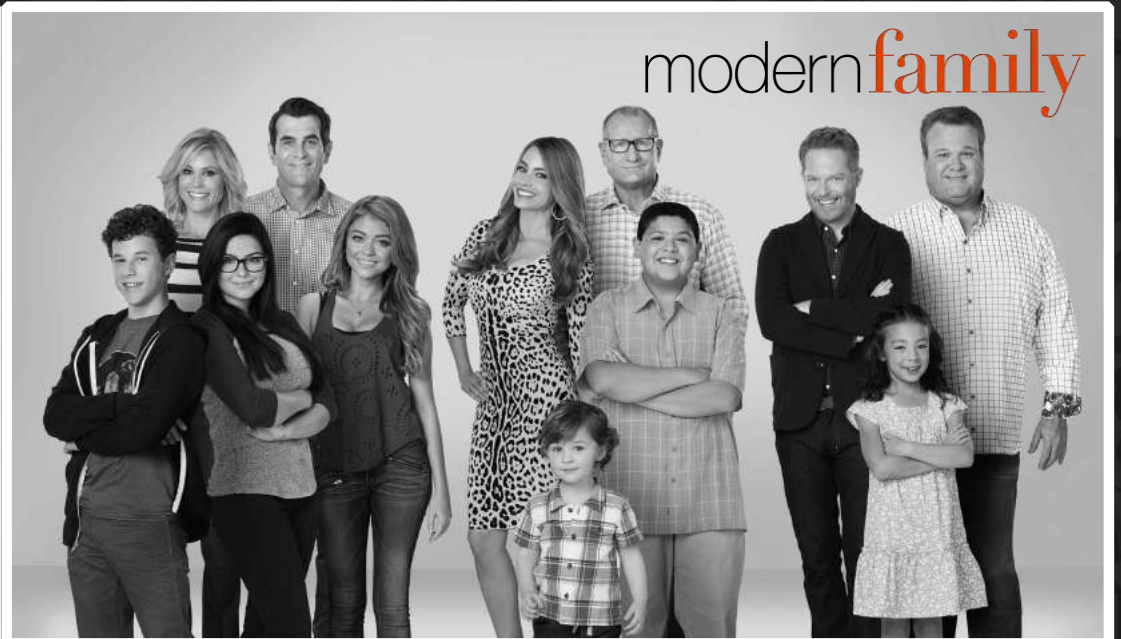
# **BRAND AUTHORITY**



TARGETED ADDRESSABLE TV







Arturito | Campbell's #RealRealLife

Your Father | Campbell's #RealRealLife

OUR RESEARCH: TRAVELERS ARE INCREASINGLY GREEN



**32%**

SELECT SERVICE  
PROVIDERS BASED ON  
ENVIRONMENTAL  
PRACTICES

---





**DON'T BUY  
THIS JACKET**

**patagonia**  
patagonia.com

## COMMON THREADS INITIATIVE

### REDUCE

**WE** make useful gear that lasts a long time

**YOU** don't buy what you don't need

### REPAIR

**WE** help you repair your Patagonia gear

**YOU** pledge to fix what's broken

### REUSE

**WE** help find a home for Patagonia gear  
you no longer need

**YOU** sell or pass it on\*

### RECYCLE

**WE** will take back your Patagonia gear  
that is worn out

**YOU** pledge to keep your stuff out of  
the landfill and incinerator



### REIMAGINE

**TOGETHER** we reimagine a world where we take  
only what nature can replace

patagonia

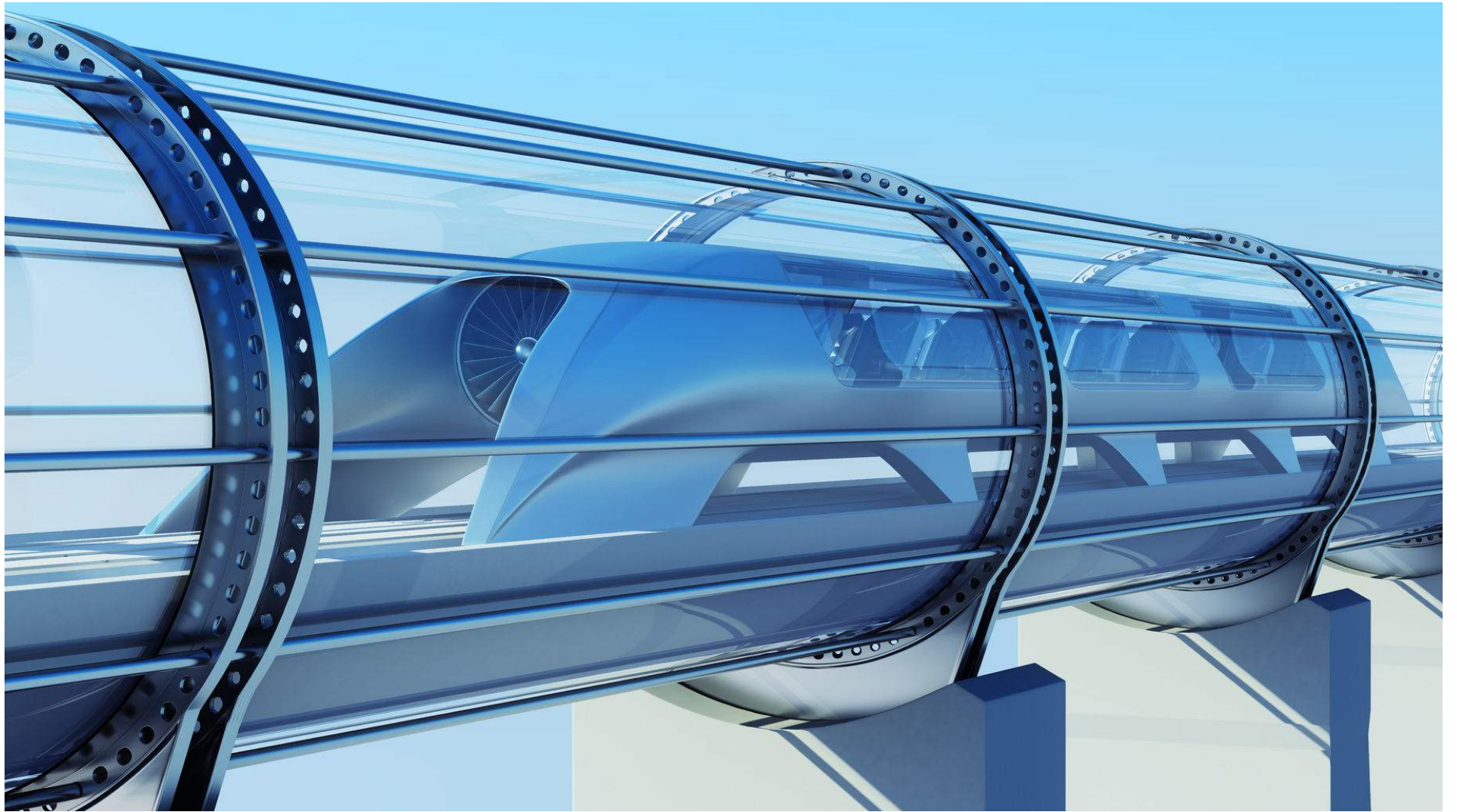


















**THANK**  
**YOU**

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WASHINGTON DC

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