

Portrait of American Traveler

November 16, 2016



Discovery, inside and out

A person is seen from behind, looking out at a sunset over the ocean. The person's head and shoulders are in the foreground, slightly out of focus. The ocean is visible in the middle ground, with a few small boats. The sky is a mix of orange, yellow, and blue. On the left side, there are some dark, silhouetted trees or bushes.

WE INSPIRE PEOPLE TO GO PLACES.

The largest integrated marketing firm in travel.

Find Out How

Our mission is simple: help travel and hospitality companies grow revenue by motivating their customers.



THE NEAR-VIEW



The only predictive survey of the travel intentions of Americans.

- 2,300 respondents
- >18 years of age
- Conducted every 90 days since Q1'07



TRAVELHORIZONS™

PERSPECTIVES ON THE TRAVEL INTENTIONS OF AMERICANS

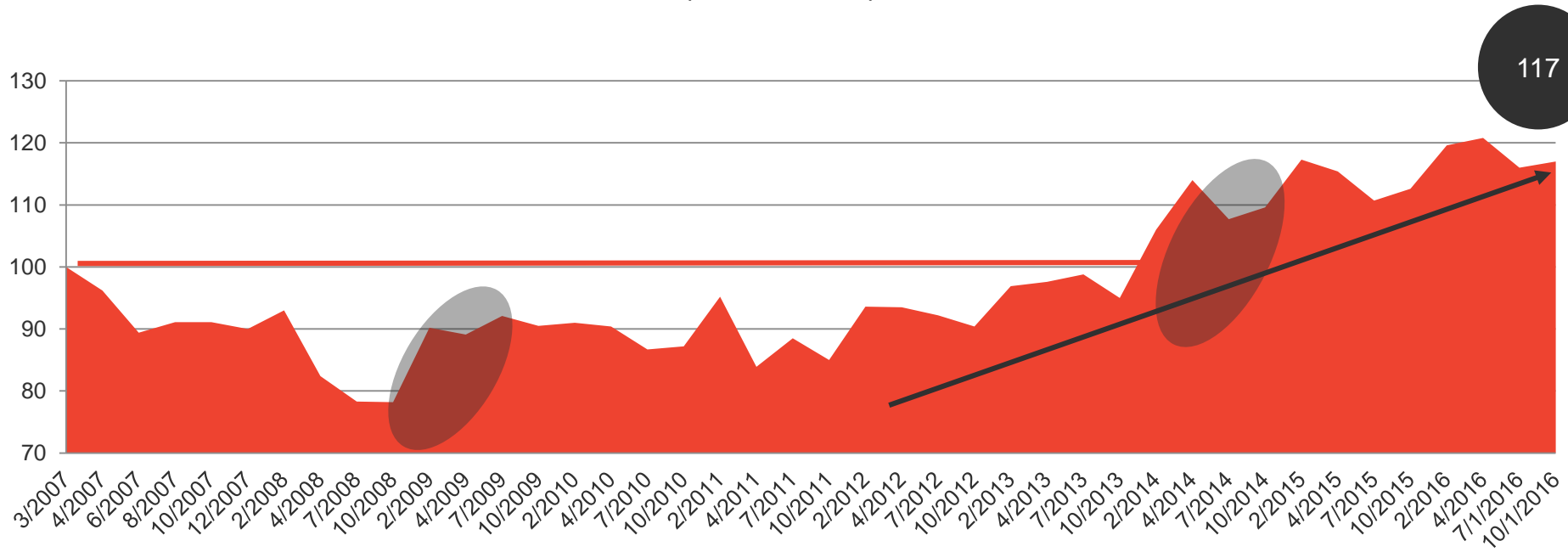
2016



THE TRAVELER SENTIMENT INDEX

TM

(2007 – 2016)



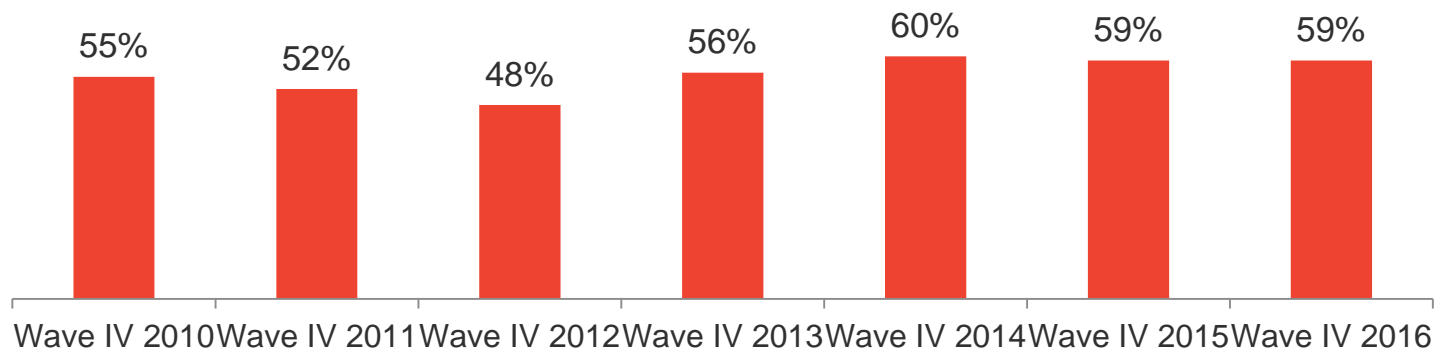
Source: travelhorizonsTM





VACATION INTENTIONS

Plan to Take at Least One Vacation during the Next Six Months



Source: travelhorizons™



MMGY GLOBAL

The logo features the word "PORTRAIT" in large, bold, red, sans-serif capital letters. Above the letters "P", "O", "R", and "T" are small red icons: a train, an airplane, a ship, and a car, respectively. Above the letter "A" is a small red icon of a person walking. Below "PORTRAIT" is the text "• OF AMERICAN TRAVELERS •" in a smaller, black, sans-serif font. Below that is the text "— PRESENTED BY MMGY GLOBAL —" in an even smaller, black, sans-serif font. The entire logo is set against a background of stylized, wavy, grey and white lines that resemble a landscape or a globe.

PORTRAIT

• OF AMERICAN TRAVELERS •
— PRESENTED BY MMGY GLOBAL —

2016 PORTRAIT OF AMERICAN TRAVELERS*

The most comprehensive analysis of the emerging travel habits, preferences and intentions of Americans.

- 2,948 respondents
- 26th year





ASHEVILLE SUBSET



Interested in Visiting
Asheville
(n=1,076)

vs.

Not Interested in Visiting
Asheville
(n=1,872)

Source: 2016 MMGY Global Portrait of American Travelers®



METHODOLOGY

- In this subset report, we specifically analyze more than 400 variables including the travel-related attitudes, behaviors, preferences, social values, lifestyles and media habits of leisure travelers who have identified themselves as “Interested in Visiting Asheville” (36% of active leisure travelers).
- Furthermore, we have compared the responses of those who meet this profile to those of leisure travelers who are “Not Interested in Visiting Asheville” (64% of active leisure travelers).

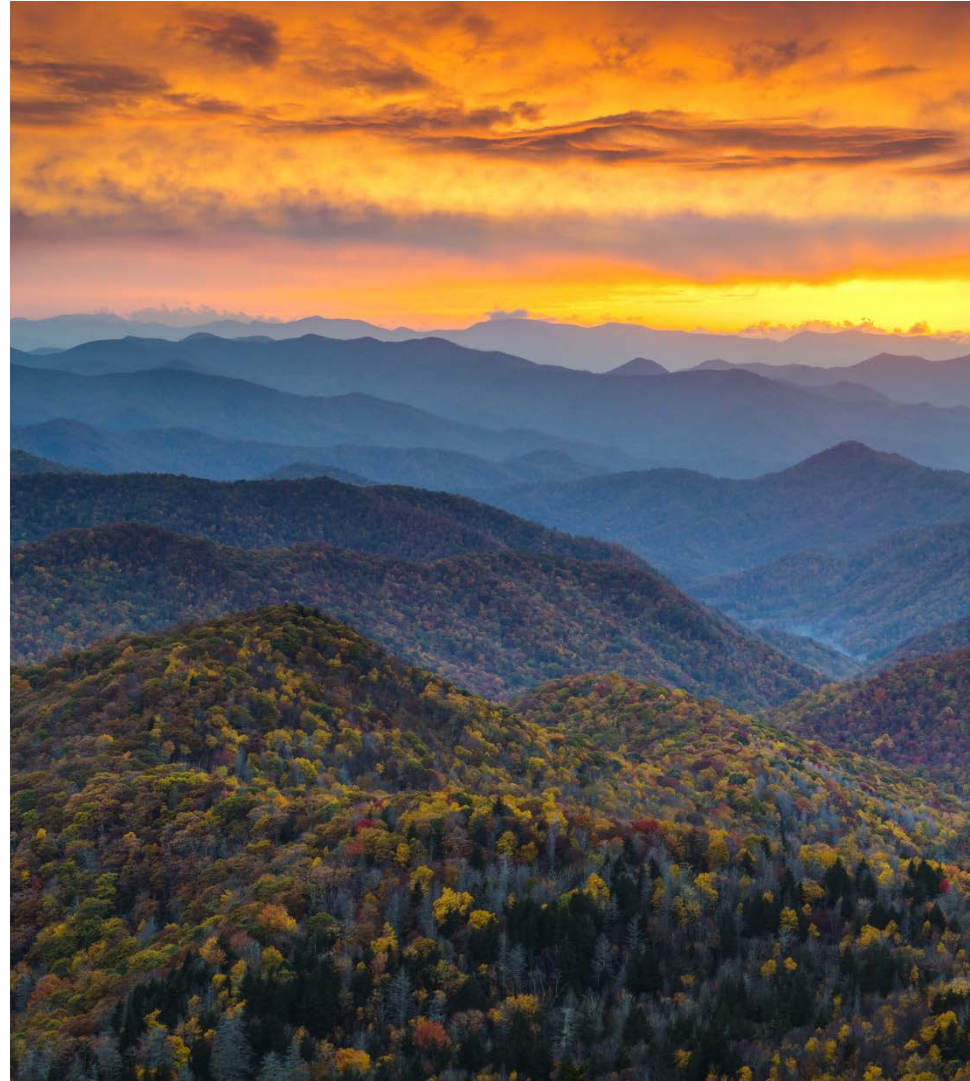
	Total Leisure Travelers	Interested in Visiting Asheville	Not Interested in Visiting Asheville
n (weighted)	2948	1076	1872
Proportion (%)	100	36	64

Note: Throughout the report, data underlined denotes statistically significant differences between the subsets of interest at 95% confidence.

INSIGHTS

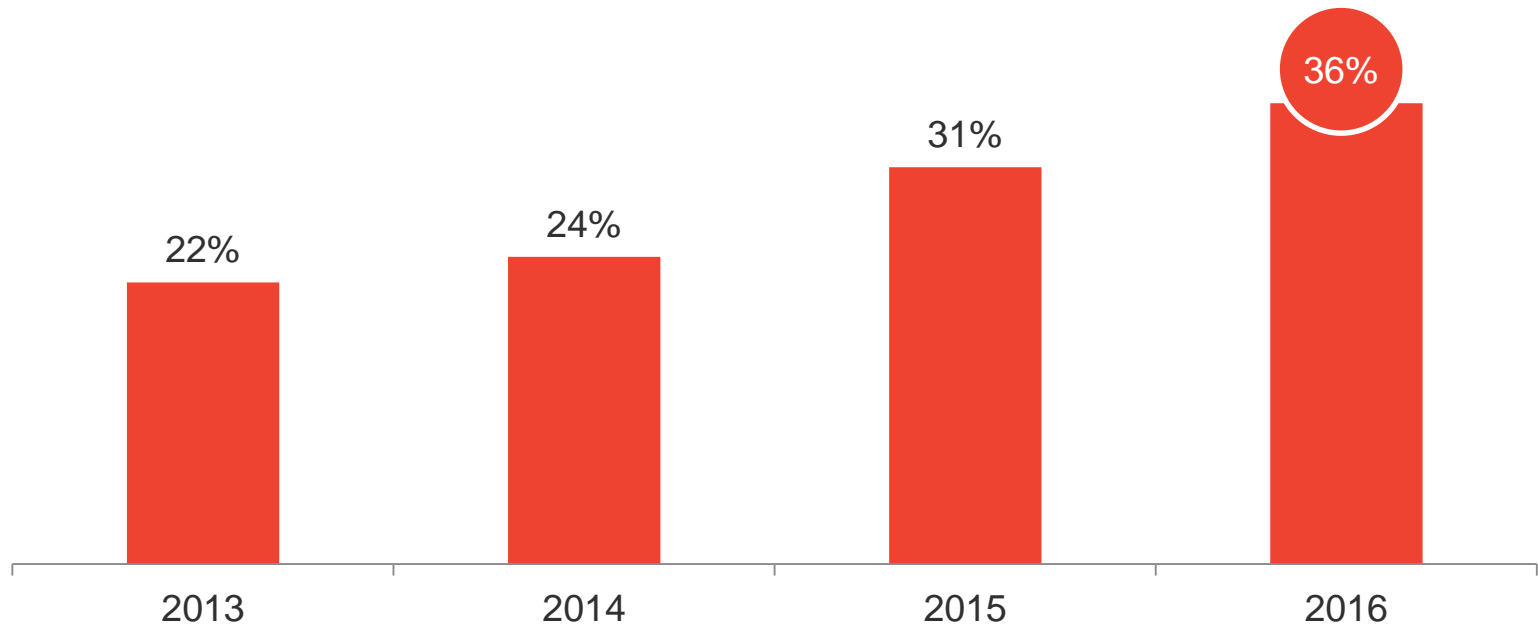
More travelers are interested in visiting Asheville in 2016 than have expressed interest in doing so in the previous three years.

Source: 2016 MMGY Global Portrait of American Travelers®



INTEREST IN VISITING ASHEVILLE

Interest in visiting Asheville has increased significantly over the past three years.

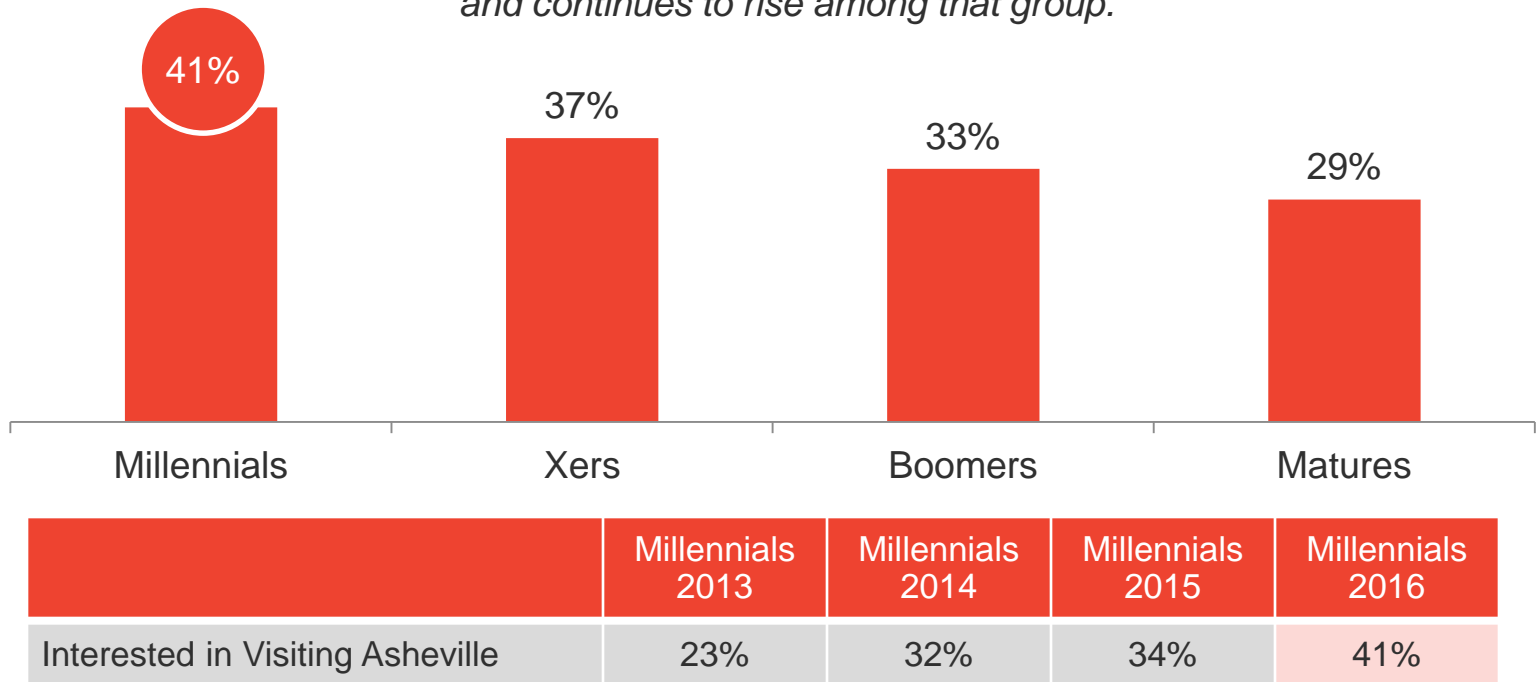


Source: 2016 MMGY Global Portrait of American Travelers®



INTEREST IN VISITING ASHEVILLE

Interest in visiting Asheville is highest among Millennials and continues to rise among that group.



Source: 2016 MMGY Global Portrait of American Travelers®



RECOMMENDATIONS

Continue to improve and expand interactions with past and future visitors through social media.

Source: 2016 MMGY Global Portrait of American Travelers®



INSIGHTS

Social media is an increasingly important influence when selecting vacation destinations.

Source: 2016 MMGY Global Portrait of American Travelers®



THE INFLUENCE OF SOCIAL MEDIA

Hours spent on social media in a typical day:

1.7

91%



47%



46%



40%



Up from
22% in
2015

40%



36%



Up from
23% in
2015

Source: 2016 MMGY Global Portrait of American Travelers®



THE INFLUENCE OF SOCIAL MEDIA

Significantly more travelers interested in visiting Asheville find social media to be influential when selecting a vacation destination.

	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Have selected a vacation destination based at least <u>partially</u> on the information viewed on social media	31%	13%
Have selected a vacation destination based <u>primarily</u> on the information viewed on social media	23%	7%

Source: 2016 MMGY Global Portrait of American Travelers®



THE INFLUENCE OF SOCIAL MEDIA

Significantly more travelers interested in visiting Asheville follow a vacation destination on social media than did so last year.

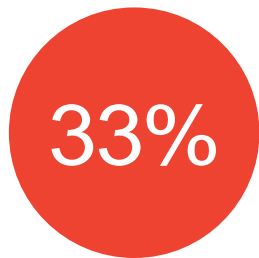
	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Follow at least one vacation destination on social media	25%	9%
Engage with at least one vacation destination on social media through comments or posted messages	19%	5%

Source: 2016 MMGY Global Portrait of American Travelers®



Active Twitter users who have used the social media platform to contact a travel brand with a question or complaint

Interested in Visiting
Asheville



Not Interested in
Visiting Asheville

18%

Source: 2016 MMGY Global Portrait of American Travelers®



THE INFLUENCE OF SOCIAL MEDIA

In the past year the influence of television advertising and social media posts from friends and family have increased during the ideas and inspiration stage of vacation planning.

Sources Considered in the Ideas and Inspiration Stage of Vacation Planning	Interested in Visiting Asheville 2015	Interested in Visiting Asheville 2016
Friends/family	36%	49%
Social media posts from friends/family	17%	31%
Social media posts from travel destination/service provider	23%	27%
Social Media Advertising	15%	25%

Source: 2016 MMGY Global Portrait of American Travelers®



RECOMMENDATIONS

Encourage visitors to review their Asheville experience online, and be sure to become part of the conversation.

Source: 2016 MMGY Global Portrait of American Travelers®



INSIGHTS

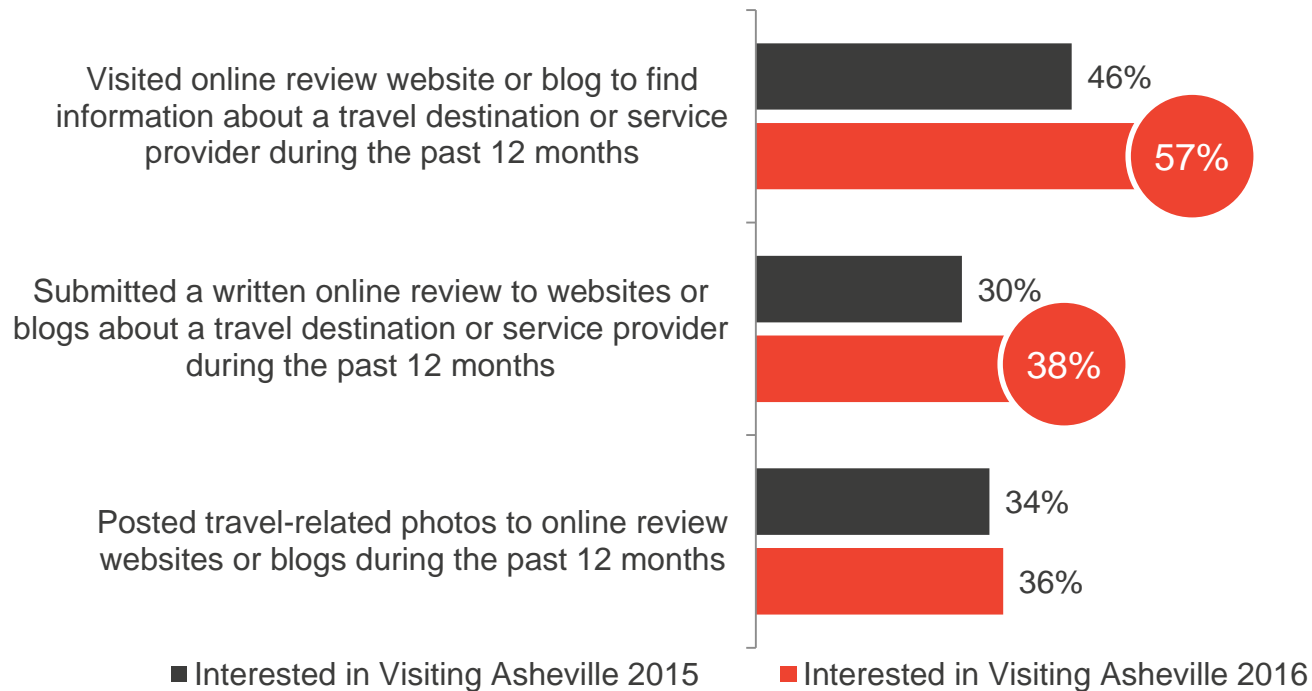
Travelers interested in visiting Asheville are using and contributing online reviews more than ever.

Source: 2016 MMGY Global Portrait of American Travelers®



INCREASING USE OF ONLINE REVIEWS

Significantly more travelers interested in visiting Asheville are visiting and submitting to online review websites and blogs than did so last year.



Source: 2016 MMGY Global Portrait of American Travelers®



INCREASING USE OF ONLINE REVIEWS

	Interested in Visiting Asheville	Not Interested in Visiting Asheville
I trust reviews and ratings by fellow travelers more than institutional ones	63%	54%
I have visited a vacation destination that doesn't live up to expectations set by online reviews	53%	41%
I feel an obligation to write and publish reviews of my travel experiences on review websites	50%	33%

Source: 2016 MMGY Global Portrait of American Travelers®



Travelers who consider travel review websites during the comparing prices and features stage of vacation planning

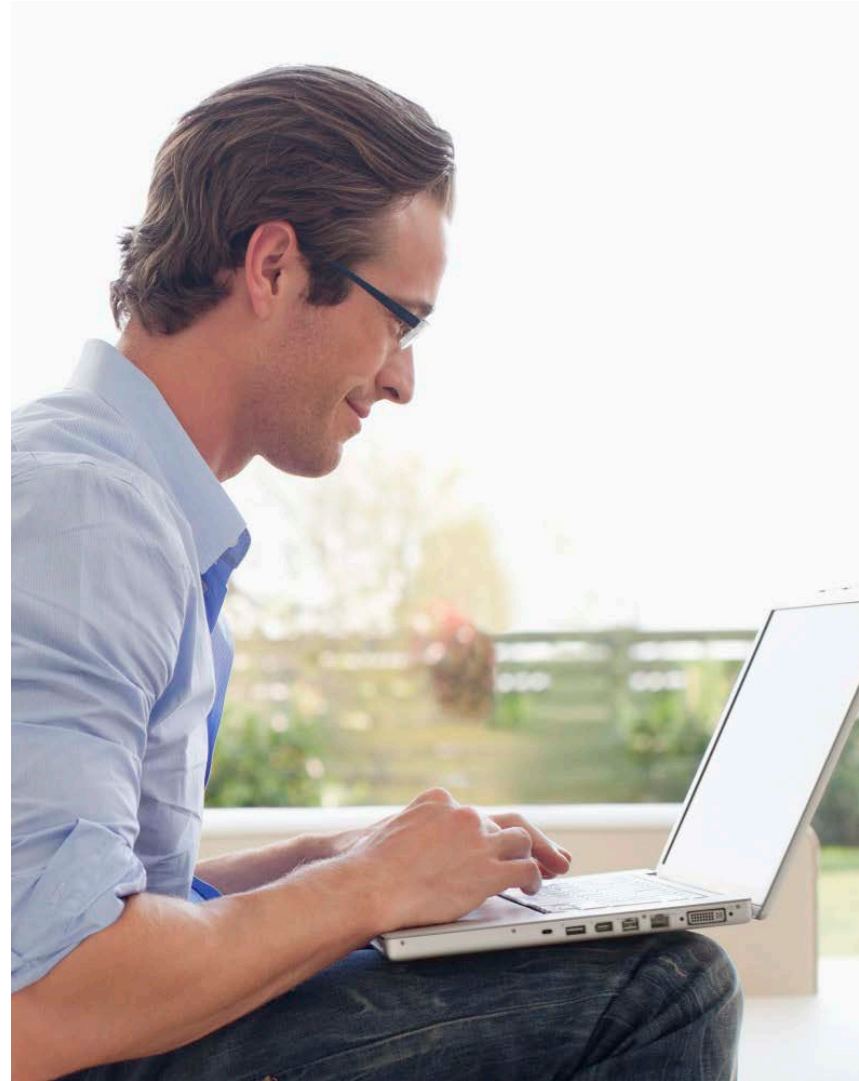
Interested in Visiting
Asheville
2015

28%

Interested in Visiting
Asheville
2016

37%

Source: 2016 MMGY Global Portrait of American Travelers®



RECOMMENDATIONS

Consider an increased focus on families with children in marketing materials.

Source: 2016 MMGY Global Portrait of American Travelers®



INSIGHTS

Attracting family travelers is important to Asheville's long-term success as a tourist destination.

Source: 2016 MMGY Global Portrait of American Travelers®



IMPORTANCE OF ATTRACTING FAMILY TRAVELERS

Significantly more travelers interested in visiting Asheville than those not interested in visiting have children under 18 living in their household.

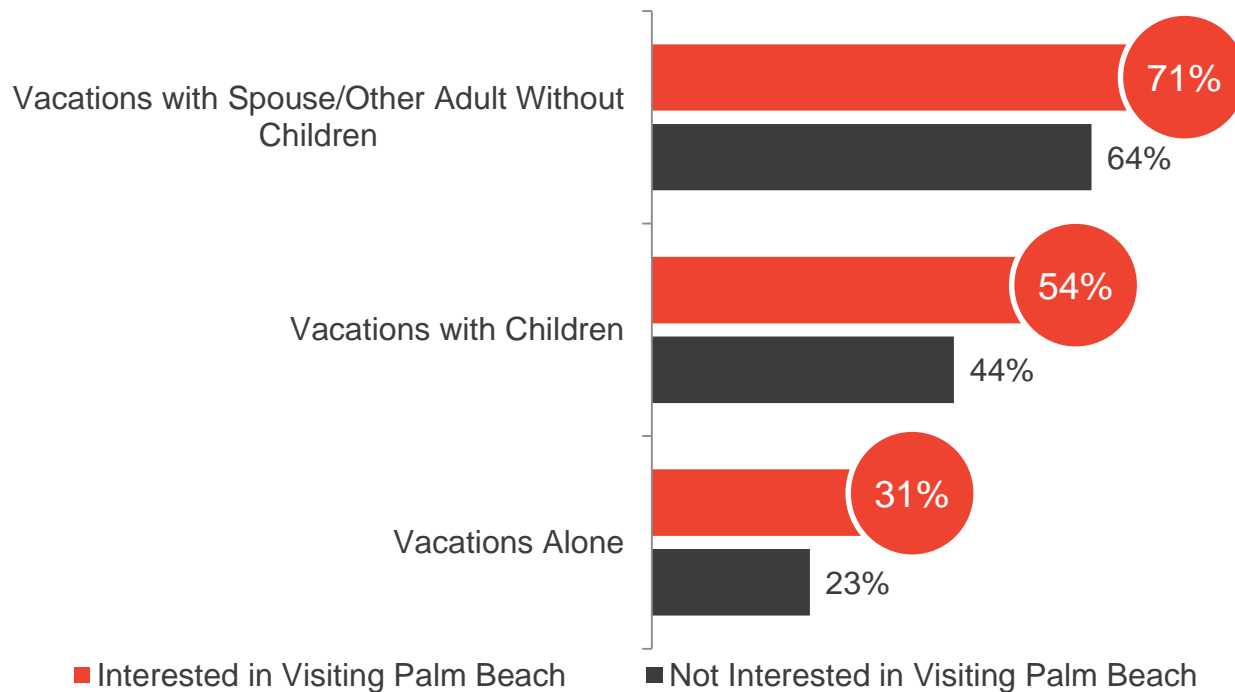
	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Children 17 or under currently in household	50%	37%
12 or under	75%	72%
13 – 18	49%	54%

Source: 2016 MMGY Global Portrait of American Travelers®



IMPORTANCE OF ATTRACTING FAMILY TRAVELERS

Significantly more travelers interested in visiting Asheville than those not interested in visiting have vacationed with children during the past 12 months.



Source: 2016 MMGY Global Portrait of American Travelers®



IMPORTANCE OF ATTRACTING FAMILY TRAVELERS

The influence of children on the vacation experience continues to increase among those interested in visiting Asheville.

	Interested in Visiting Asheville 2015	Interested in Visiting Asheville 2016
Planning the daily activities	75%	83%
Picking the vacation destination	73%	78%
Selecting the hotel/resort	63%	71%

Source: 2016 MMGY Global Portrait of American Travelers®



“We are at the mercy of our children when making vacation decisions.”

Interested in Visiting
Asheville

54%

Not Interested in
Visiting Asheville

27%

Source: 2016 MMGY Global Portrait of American Travelers®



RECOMMENDATIONS

Explore the opportunity to bring in travelers with last-minute deals.

Source: 2016 MMGY Global Portrait of American Travelers®



INSIGHTS

Last-minute vacations are appealing to the traveler interested in visiting Asheville.

Source: 2016 MMGY Global Portrait of American Travelers®



LAST-MINUTE VACATIONS

*Percentage of total
vacations considered
last-minute*

Interested in Visiting
Asheville

24%

Not Interested in
Visiting Asheville

13%



LAST-MINUTE VACATIONS

Significantly more travelers interested in visiting Asheville than those not took more last-minute vacations during the past 12 months.

	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Took at least one last-minute vacation during the past 12 months	41%	24%
Average number of last-minute vacations *	2.6	1.7
Average number of days ahead of departure decided to take vacation *	5.9	6.4

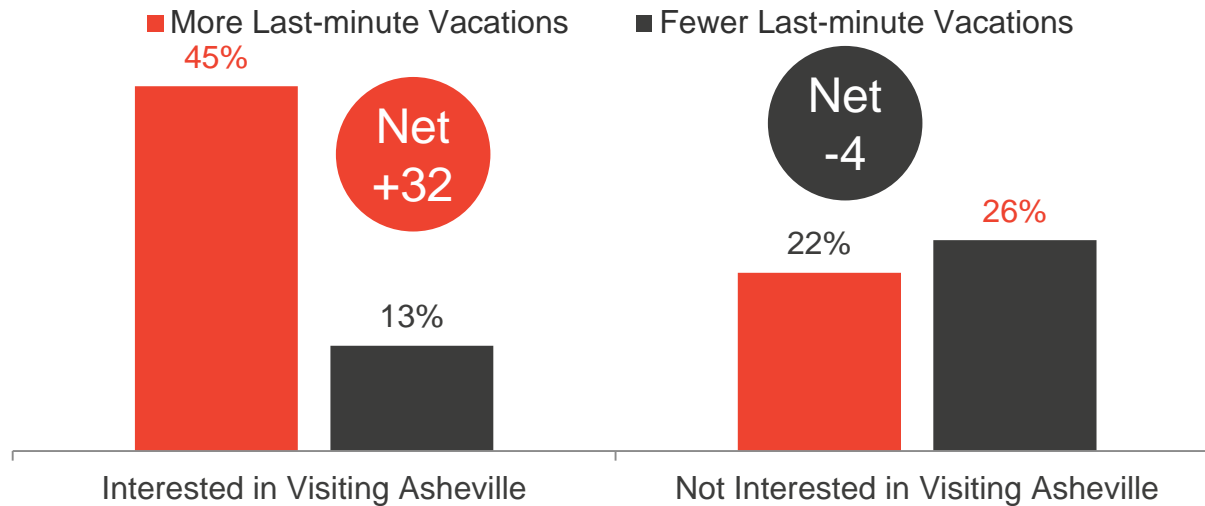
* Among travelers who took at least one last-minute vacation during the past 12 months.

- 38 -



LAST-MINUTE VACATIONS

In Next 12 months, Plan to Take *



* Among travelers who took at least one last-minute vacation during the past 12 months.

- 39 -



LAST-MINUTE VACATIONS

Reasons for Taking Last-Minute Vacation *	Interested in Visiting Asheville	Not Interested in Visiting Asheville
I felt like I needed a break	41%	38%
I had a last minute opening in my schedule and I decided to take a vacation	<u>34%</u>	25%
I simply had a desire to go on vacation at the last minute	34%	33%
I discovered a compelling offer I couldn't pass up	<u>30%</u>	22%
Because of my personal schedule, I can't plan vacations very far in advance	<u>27%</u>	16%
I get the best prices on travel services through last minute deals	<u>24%</u>	16%
I typically plan my vacations on a last-minute basis	<u>21%</u>	9%

* Among travelers who took at least one last-minute vacation during past 12 months.

- 40 -



INSIGHTS

Traditional travel agents will be an increasingly important factor in the years ahead.

Source: 2016 MMGY Global Portrait of American Travelers®



INCREASING IMPORTANCE OF TRAVEL AGENTS

Significantly more travelers interested in visiting Asheville than those not have used a traditional travel agent during the past 12 months and plan to use their services during the next two years.

	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Used a traditional travel agent for at least one vacation during the past 12 months	24%	8%
Plan to use the services of a traditional travel agent for a vacation during the next two years	36%	18%

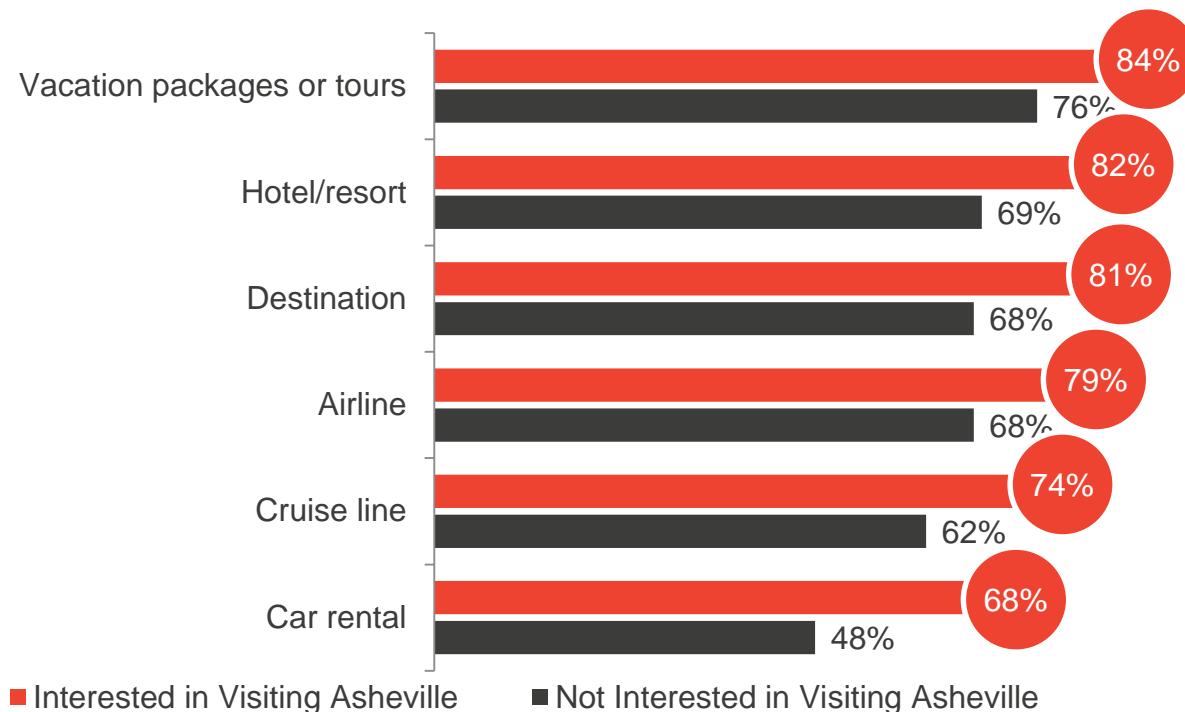
Up from 27%
in 2015

Source: 2016 MMGY Global Portrait of American Travelers®



INCREASING IMPORTANCE OF TRAVEL AGENTS

Among travelers who intend to use a traditional travel agent during the next two years, significantly more of those interested in visiting Asheville are influenced by them in their destination selection.



Source: 2016 MMGY Global Portrait of American Travelers®



INCREASING IMPORTANCE OF TRAVEL AGENTS

Reasons for Working with a Traditional Travel Agent over an OTA	Interested in Visiting Asheville	Not Interested in Visiting Asheville
Knowledge of the destinations/travel services providers	89%	82%
Recommendations that assure high quality travel experiences	87%	76%
An understanding of what's hot and new	81%	66%

Source: 2016 MMGY Global Portrait of American Travelers®



AND FINALLY,
WHAT YOU ALWAYS WANTED TO KNOW





DO MORE ON VACATION?

Behavior	2016
Eat	54%
Drink alcoholic beverages	41%
Have sex	34%
Sleep	32%
Exercise	23%

Source: 2016 MMGY Global Portrait of American Travelers®



THANK YOU, LET'S DISCUSS

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