

Lunch, Panel Wrap Up and MOF Highlights

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MARKETING OUTLOOK FORUM



Presented by the Travel and Tourism Research Association

October 25-27, 2015 ~ Loews Philadelphia ~ Philadelphia, Pennsylvania, USA

2015 Marketing Outlook Forum Wrap-Up Summary

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Major Themes: 2015 MOF General Sessions

- Global economy subject to cross-winds
- Travel defying gravity
- Near-term, most opportunity in domestic markets
- Inbound travel to U.S. generally holding its own but outbound travel growing much more – Canada inbound driving down the numbers
- What the consumer wants:
 - High Tech/High Touch
 - Interaction and Kinship
 - Engagement

Major Themes: 2015 MOF General Sessions

- Halo Magic - Creating a singular place brand for destination marketing & economic development
- The value of collaboration and leveraging, unique marketing approaches, engagement and shock marketing in times of tight budgets
- Maximizing marketing with Big Data
- Digital Disruption – The Sharing Economy
- Value of Futures Research and Way of Thinking

Economic Trends

Adam Sacks, Tourism Economics

- Global economy - buffeted by cross-winds.
- U.S. economy - consumer led; moderate growth stimulated by low oil prices and interest rates; growth in personal income, labor, wages, consumption and confidence.
- Europe on the mend but weakness in emerging markets (with China chief culprit), India surpassing China in economic growth, Brazil wallows in a recession
- Elevated value of the dollar and restrained economic growth abroad is hampering export growth, including international travel to U.S.
- The short-term view remains favorable - U.S. on a strong trend line and should continue. Expect modest acceleration in economic activity as end 2015 and into 2016.

Travel Trends

Adam Sacks, Tourism Economics

- Travel has grown for six straight years – record volumes on planes and at hotels. Air travel increased by more than 3.5% in the 12 months ending in June 2015 - and summer of 2015 air travel growth should be even higher.
- RevPAR has eclipsed prior peak (in 2007) in real terms and Real ADR has surpassed prior peak in aggregate. Room demand per capita returning to long-term trend – further gains expected at moderate pace. Now getting RevPAR growth primarily through ADR growth
- Modest acceleration in economic activity implies continued growth in the travel sector.
- Travel outpaced the economy in 2014 and 2015 – expected to grow at a slower rate than the real economy in 2016.
- Growth primarily domestic as international inbound travel slows and will continue to struggle
- Stronger near-term outlook for domestic travel but looming risks temper the long-term view
- Leading travel indicator – tapering growth into early 2016

U.S. Travel Association/Tourism Economics Forecast: Travel Volume

	2015	2016
Domestic U.S. Travel	+2.4%	+2.0%
Domestic U.S. Leisure Travel	+2.5%	+2.1%
Domestic U.S. Business Travel	+2.0%	+1.4%
International Travel to U.S.	+0.2%	+3.1%

U.S. Travel Association/Tourism Economics Forecast: Travel Spending

	2015	2016
Domestic U.S. Travel	+2.5%	+3.3%
Domestic U.S. Leisure Travel	+2.1%	+3.6%
Domestic U.S. Business Travel	+2.1%	+2.8%
International Travel to U.S. (excluding fares)	-0.3%	+4.1%

International Travel to the U.S.

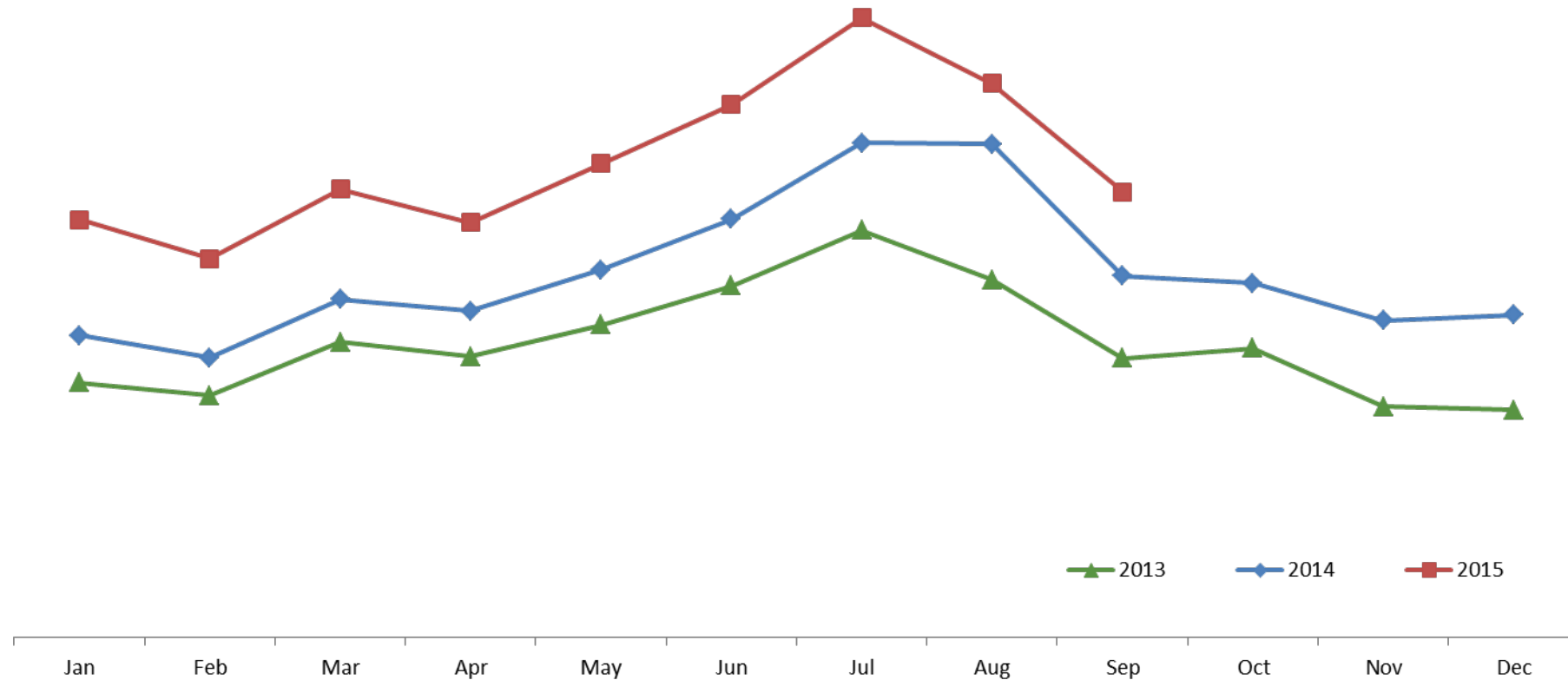
- Growth in domestic travel outpacing international travel.
- International travel - impacted by the strong U.S. dollar - making it more expensive for travelers to visit the US. Individual country economic performances adding downward pressure on visitation.
- U.S. outbound is surging. Visits shifting northbound – U.S. travel to Canada up a lot but declines from Canada to U.S. in 2014 and 2015.
- **Trip Advisor:** The most popular world destination in 2014, and for 2015, is the U.S. The destinations that travelers would most love to go in the next two years if money were no object are Australia, U.S. and Italy - their dream destinations.



Global Interest in US Content

- The number of global sessions viewing United States content on TripAdvisor has grown rapidly in 2014 vs 2013, and has shown even greater growth thus far in 2015
- Overall the traffic has grown by 24% YoY

Global Sessions Viewing United States Content





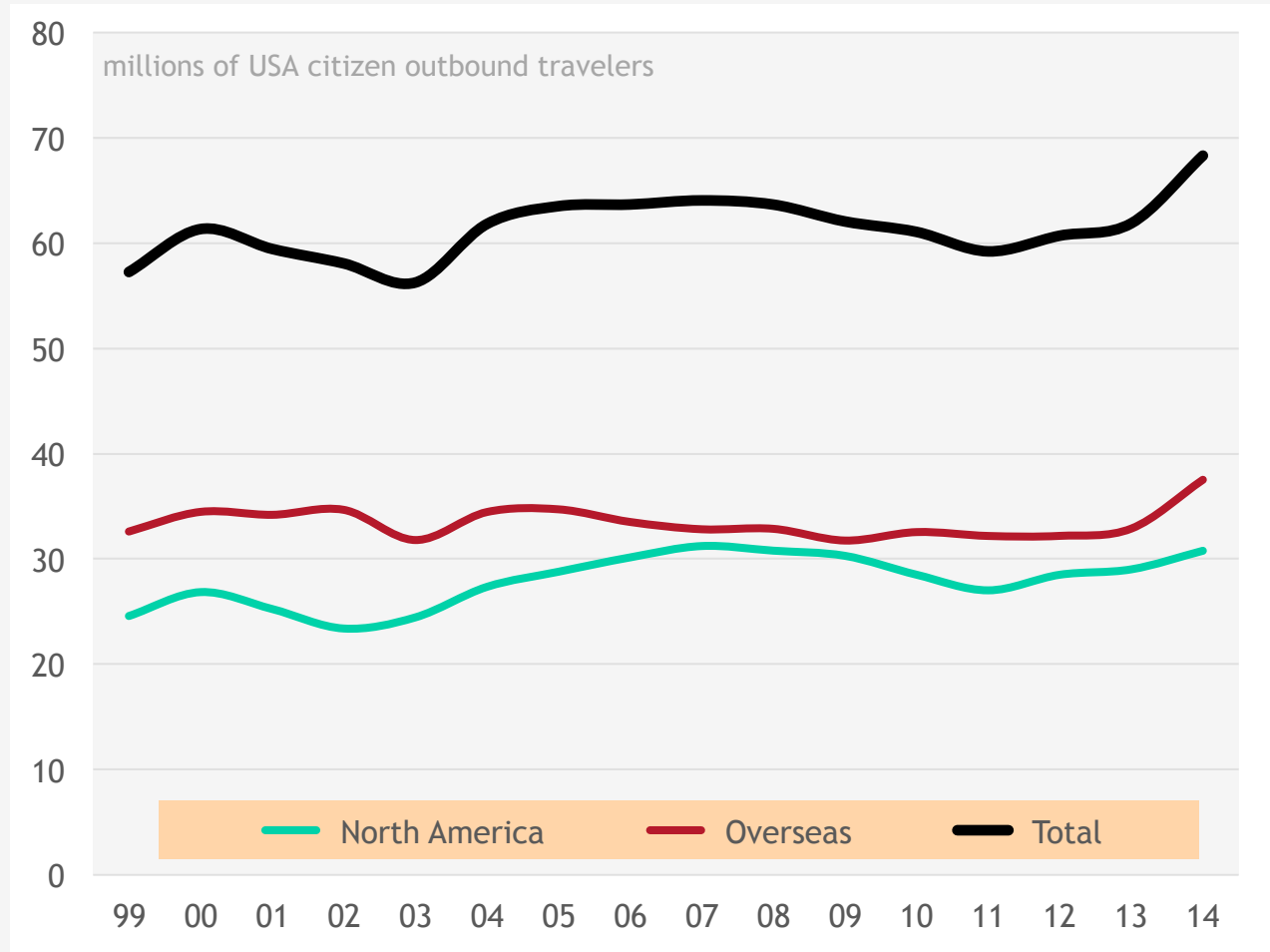
Exchange Rate Analysis...

- Exchange rate impact on visitor volume to USA at a country level is...*mixed*. Stronger for CN, BR, GE.
- ...or may be stronger some times but not others...as other factors become more important. ALL because...
 - #8 mix and change in mix for purpose—leisure likely most sensitive;
 - #7 change in travel prices...in destination country (hotels, attractions), in origin country (airfare, air fuel surcharge, packages);
 - #6 currency changes also accompany other important factors;
 - #5 intoxicating travel marketing and promotions;
 - #4 volume methodology change;
 - #3 in general, the industry adjusts...and re-adjusts.
 - #2 Surveys, especially of travel agencies, apply to a slice of the total volume—the slice perhaps most sensitive to currency changes. Similar to #8 above.
 - #1 **A small proportion of persons account for a large proportion of trips/visitors/visitor nights.**



USA Outbound Travel Trends

- USA outbound had been flat for more than a decade, especially to O/S.
- 2014 shattered the 2007 record because of O/S
- Destinations (2015 YTD):
 - Total: +7%.
 - To Mexico: +8%
 - Air +11%
 - To Europe: +5%.
 - To Canada: +9%
 - air +7%
 - To Caribbean: +7%.
 - To Asia: +6%
 - To C. America: +0%.
 - To South America: -1%
 - To Middle East (+15%) *pass-thru?*
 - To Africa : -6%





International Inbound Forecasts

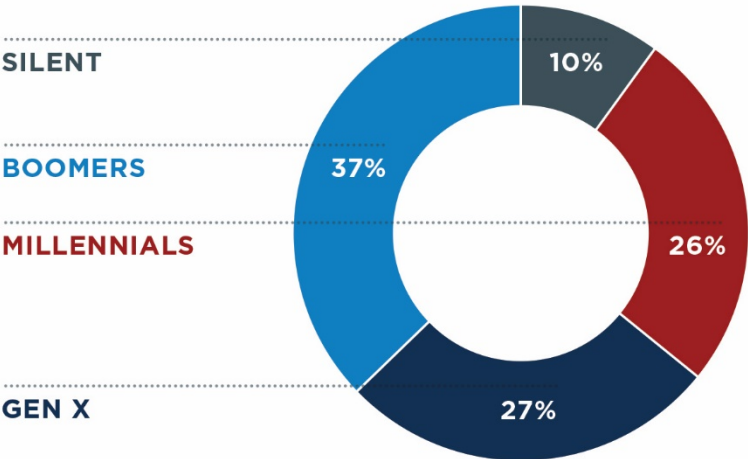
Rank	Visitor					%	%	%	Total	%	
Order	Origin	Actual	Forecast	Forecast	Forecast	Change	Change	Change	Change	Change	CAGR
2014	Country	2014	2015	2016	2020	14/13	15/14	16/15	20/14	20/14	20/14
	Grand Total	75,011	75,334	77,280	90,267	7.2%	0.4%	2.6%	15,256	20.3%	3.1%
	Overseas	34,938	36,248	37,868	45,276	9.0%	3.7%	4.5%	10,338	29.6%	4.4%
1	Canada	23,003	21,163	20,951	23,807	-1.7%	-8%	-1%	804	3%	0.6%
2	Mexico	17,070	17,923	18,461	21,183	17.3%	5%	3%	4,114	24%	3.7%
3	United Kingdom	4,149	4,440	4,617	4,949	8.2%	7%	4%	800	19%	3.0%
4	Japan	3,620	3,548	3,512	3,655	-3.0%	-2%	-1%	35	1%	0.2%
5	Brazil	2,264	2,355	2,284	2,671	9.9%	4%	-3%	407	18%	2.8%
6	China	2,190	2,562	2,972	5,019	21.2%	17%	16%	2,829	129%	14.8%
7	Germany	2,056	2,118	2,161	2,293	7.3%	3%	2%	237	12%	1.8%
8	France	1,658	1,642	1,675	1,903	10.2%	-1%	2%	245	15%	2.3%
9	South Korea	1,460	1,664	1,748	1,986	7.4%	14%	5%	526	36%	5.3%
10	Australia	1,304	1,369	1,410	1,650	8.2%	5%	3%	346	27%	4.0%
11	Italy	964	954	973	1,074	14.9%	-1%	2%	110	11%	1.8%
12	India	962	1,087	1,163	1,414	12.0%	13%	7%	452	47%	6.6%
13	Colombia	881	890	908	1,103	17.8%	1%	2%	222	25%	3.8%
14	Spain	708	743	758	829	14.2%	5%	2%	121	17%	2.7%
15	Argentina	685	616	585	585	-0.2%	-10%	-5%	-99	-15%	-2.6%
16	Netherlands	642	655	668	702	9.0%	2%	2%	60	9%	1.5%
17	Venezuela	616	505	480	461	-21.8%	-18%	-5%	-155	-25%	-4.7%
18	Sweden	552	591	614	691	15.8%	7%	4%	139	25%	3.8%
19	Switzerland	500	515	525	563	5.6%	3%	2%	63	13%	2.0%
20	Taiwan	414	447	474	576	7.7%	8%	6%	162	39%	5.7%

Leisure Travel Trends

- Leisure travel has been strong but is evolving
- Consumers markets evolving as well
- Emphasis on experiences

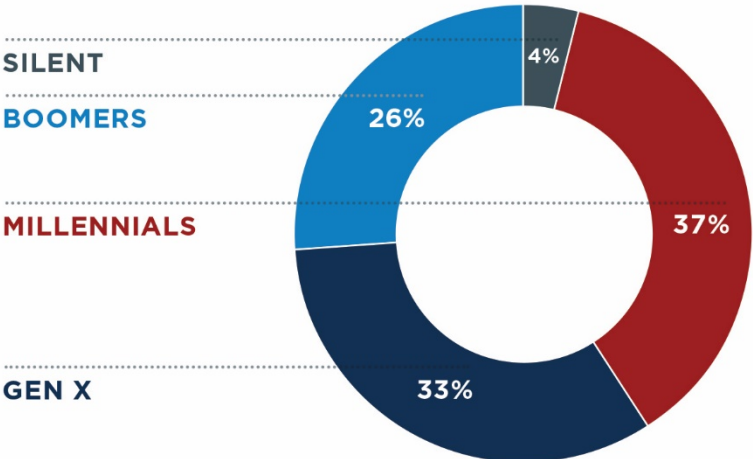
Changing Demographic, Cultural, Economic Environment

2014 LEISURE TRIPS BY GENERATION



SOURCE: TNS TravelsAmerica

2014 HISPANIC LEISURE TRIPS BY GENERATION



SOURCE: TNS TravelsAmerica

Millennials - Who are they?

BORN BETWEEN **1983 - 2001**

MAKING UP MORE THAN **¼ of the Population**

TAKE MORE FREQUENT VACATIONS

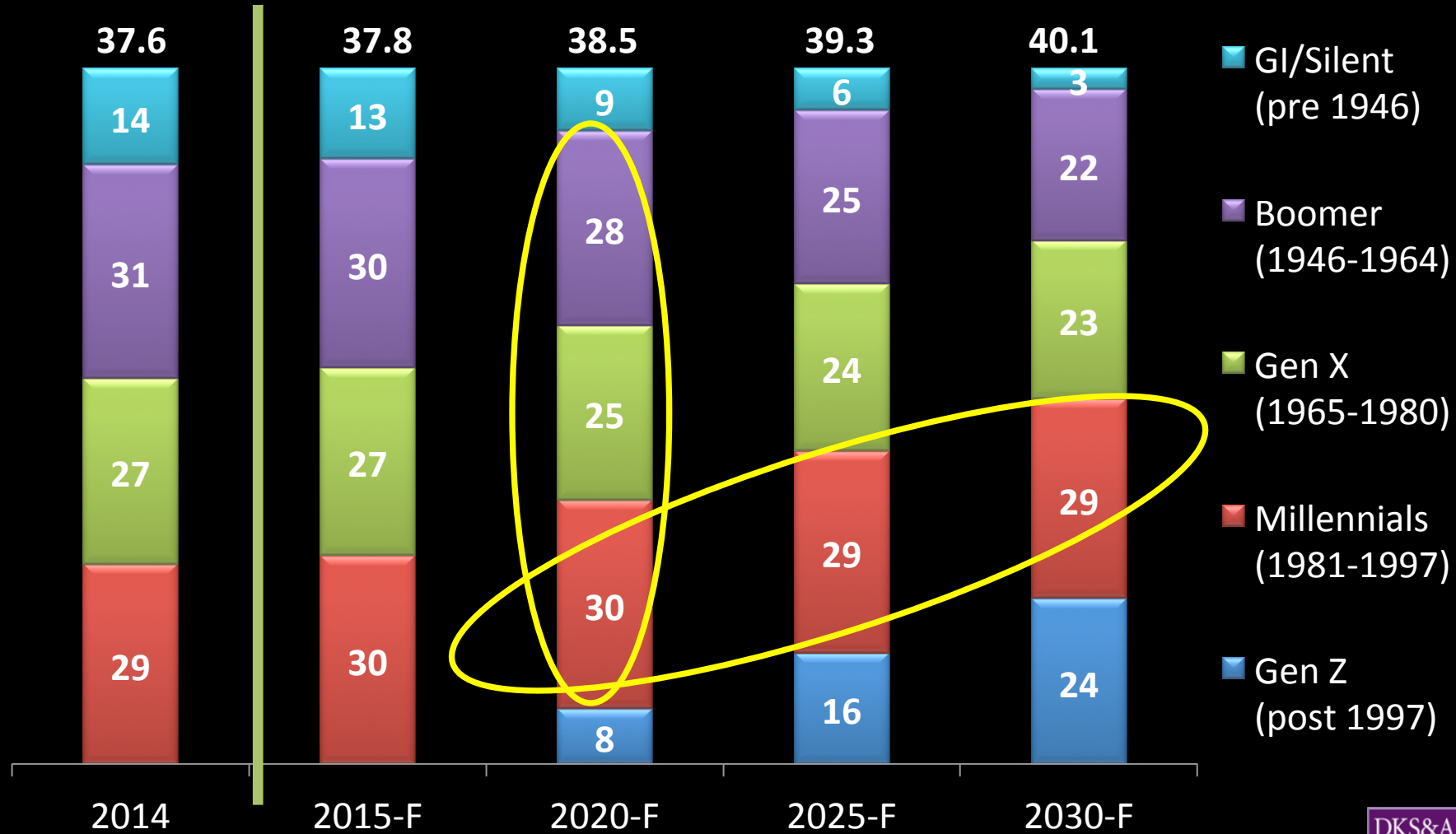
- Often **stay closer to home**
- Look for a more **local / intimate experience**

OUT OF REPEAT GUESTS

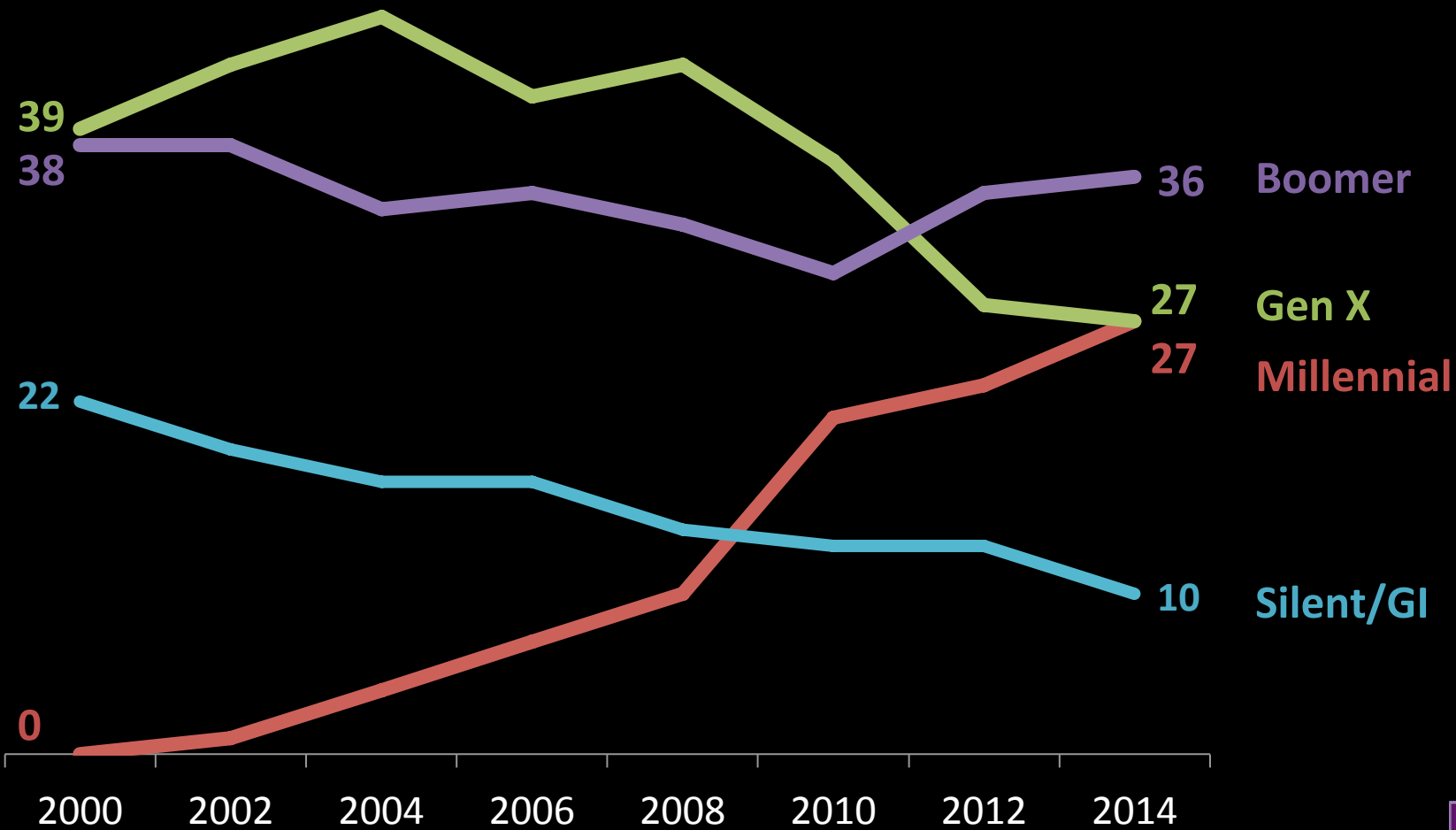
- **24% are under 40** and make up less than **22% of our revenue**

MORE INTERESTED IN **International Travel** than non-millennials **75% vs 52%**

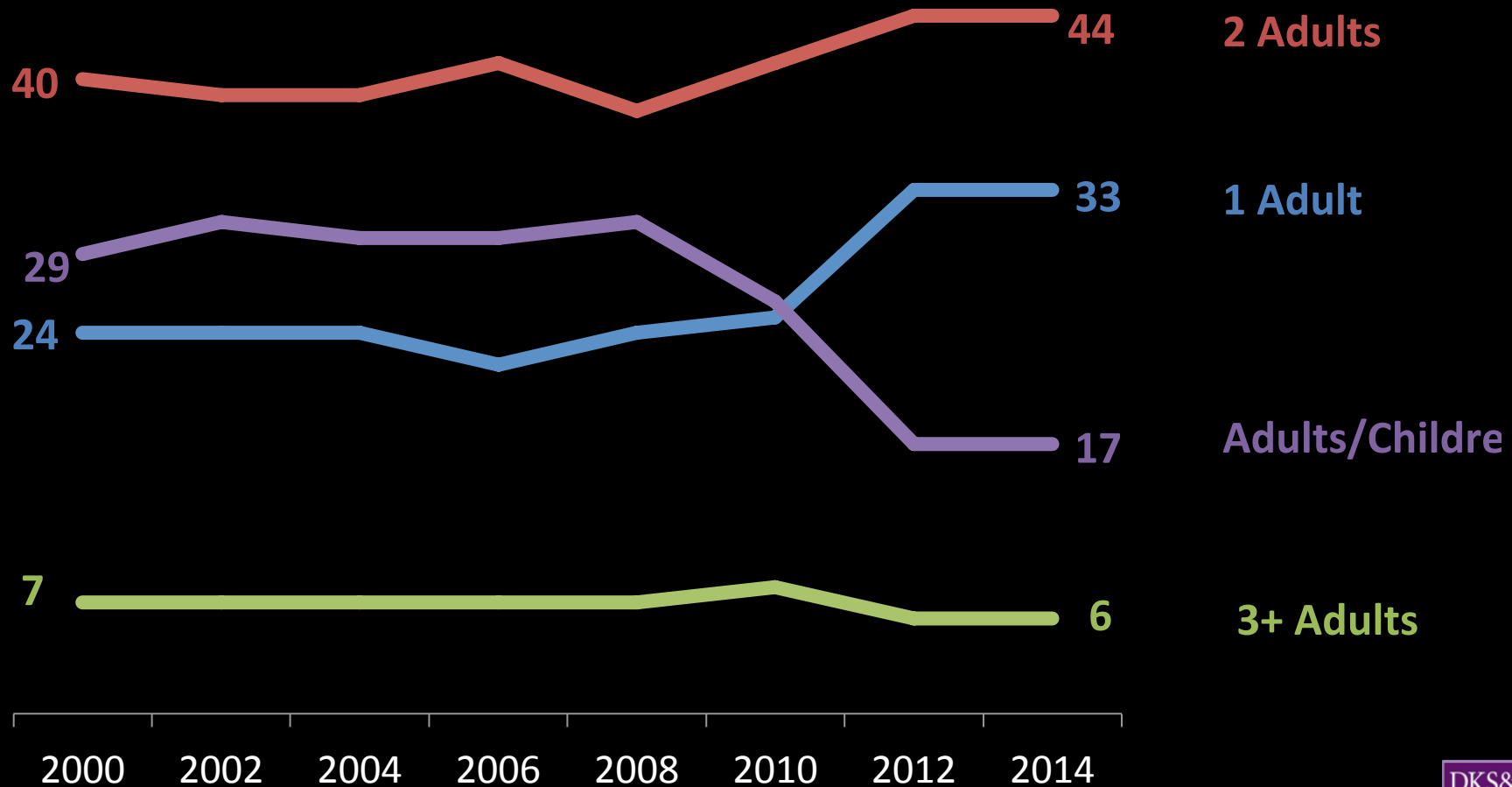
The Generation Divide



Older generation travels most



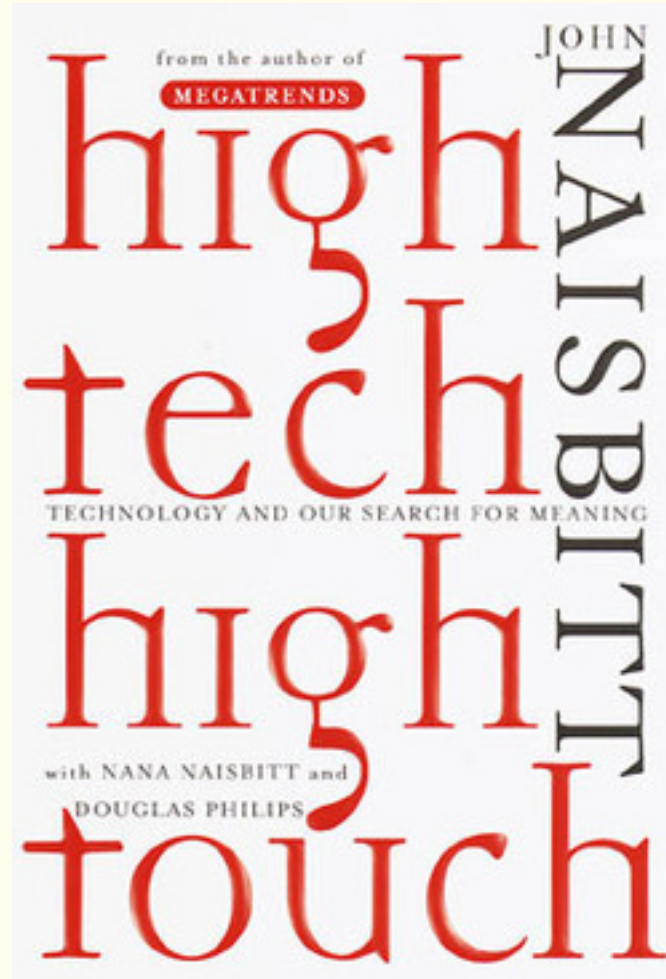
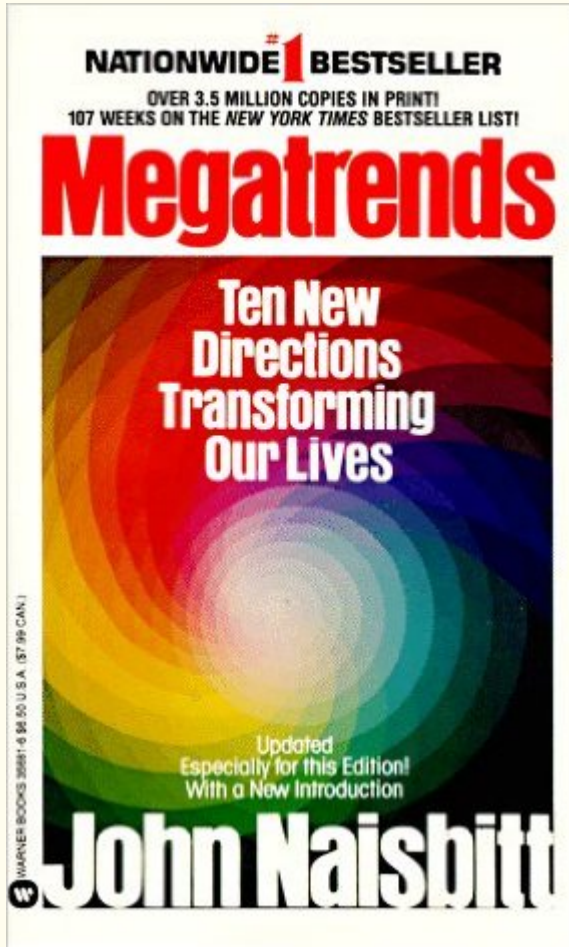
Singles increase; Families decrease



J. Walker Smith, The Futures Company – Today's Consumer

- Consumers value personal service at the same time they want everything digital. They want High Tech/High Touch – need to leverage both.
- Kinship – demographic trends (especially the growth of single households worldwide) boosting the need for social connectedness.
- People want to connect to each other rather than to your brand directly. This delivery of relationships is being facilitated by technology. We need to give our consumers the social currency to make these connections.
- By 2020, everyone in the world will have a smart phone, the only time in history that everyone on the planet will have the same technology.
- Shift from active digital to passive digital – expect our algorithms to do all the work.

The Social Economy



Outlook for Attractions



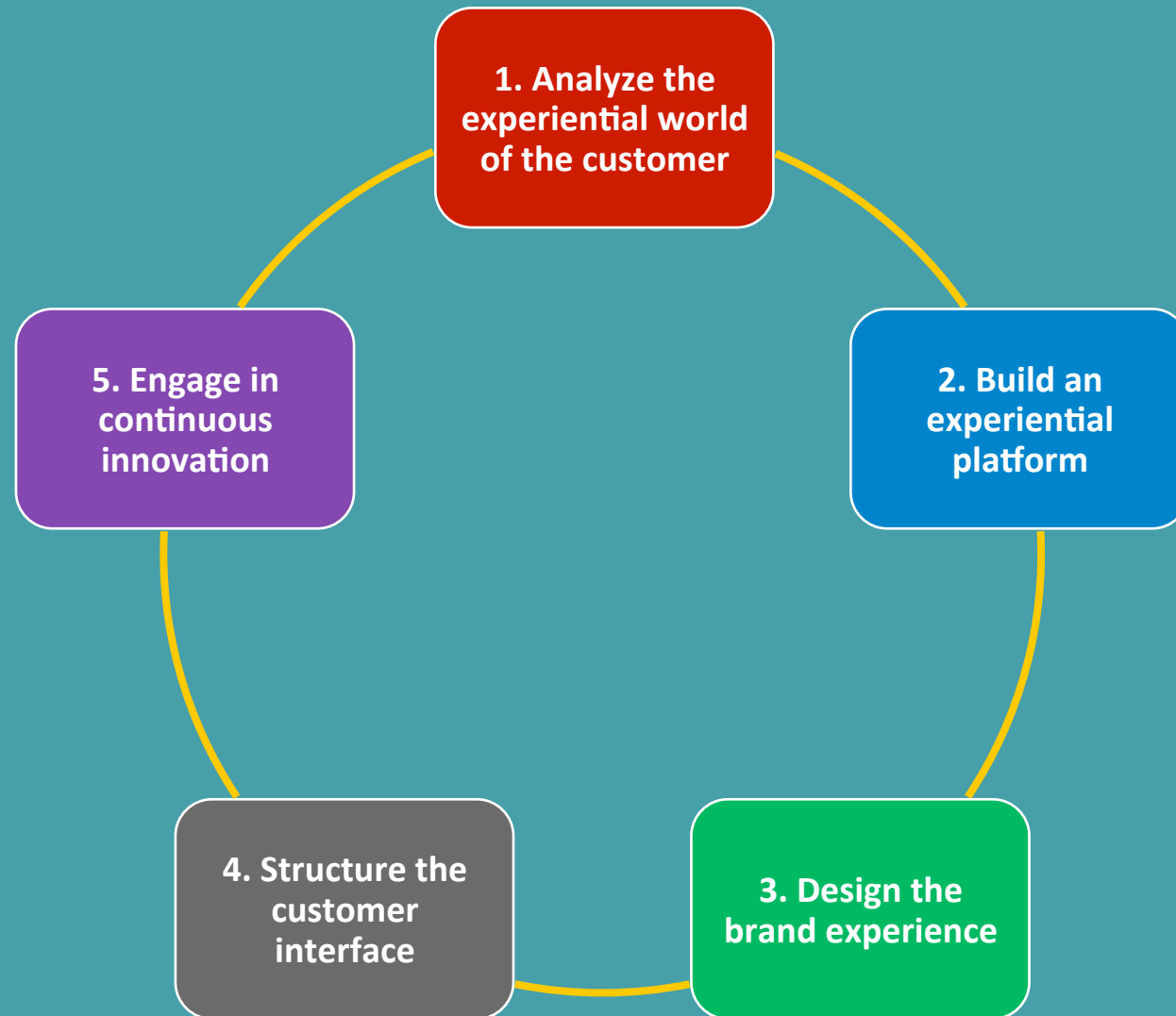
Consumers want experiences, not things



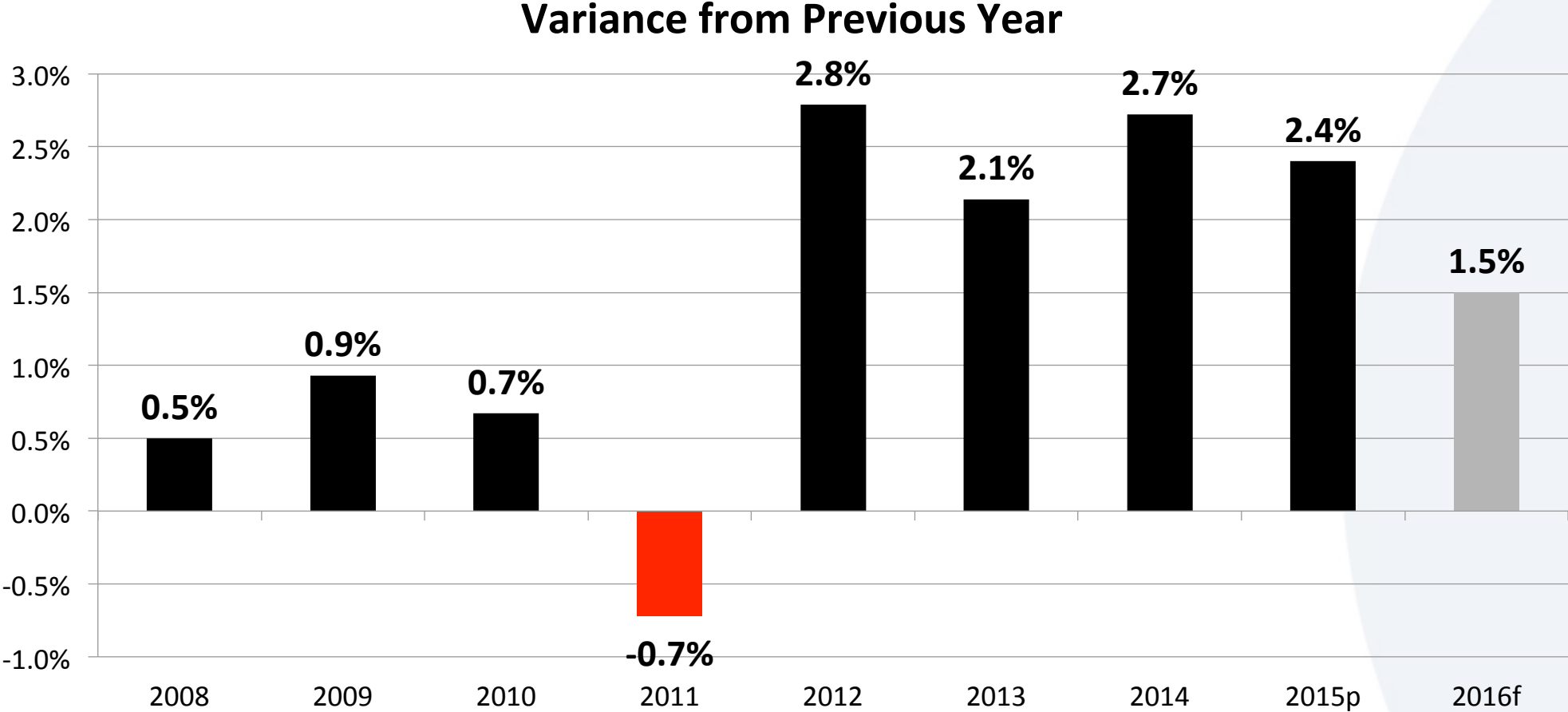
What types of experiences can we offer to our guests in the attraction industry?

- Experience may be divided into different types, each with its own inherent structures and processes.
- Managers view experiences as Strategic Experiential Modules (SEMs) that have become a framework for experience design and marketing.

Five steps of Customer Experience Management



Attractions - The H2R Performance Index is expected to finish 2015 with a 2.4% increase followed by a 1.5% increase in 2016



Source: H2R Market Research

Five Key Takeaways

The attractions industry is a **fragmented** market space.

Aggregate attraction industry performance has **grown steadily** the past 3 years.

Most segments of the attractions industry are growing.

Expect **slowing, but moderate growth** in 2015 and 2016.

Expect **greater change**, innovation & diversity.

Dressing Downton Exhibition

Dates: February 5th – May 25, 2015

**Over 40 costumes from the popular Downton Abbey series
on PBS on display in Biltmore House**



Dressing Downton Exhibition

Why did it make sense?

- Same time period as Biltmore
- Many parallels:
 - Upstairs/downstairs
 - Similar lifestyle
- Take advantage of the popularity of Downton Abbey series
- Added value for guests and our passholders



Lessons Learned

- Tie in with pop culture trends works!
 - Drives PR opportunities
 - Drives higher interest in general
- Social media worked
- Involve all departments to drive all revenue streams
- Sponsorships work
- Careful selection of partner – make sure you have the same vision



AMERICA'S NEXT GREAT MUSEUM IS HERE

BENTONVILLE, ARKANSAS
CrystalBridges.org



CRYSTAL BRIDGES
MUSEUM OF AMERICAN ART

**Crystal Bridges Museum of American Art
welcomes all to celebrate the American spirit
in a setting that unites the power of art with
the beauty of nature.**



CRYSTAL BRIDGES POSITIONING STRATEGY

- **Credibility**
- **Collaboration**
- **Culture**
- **Communication**

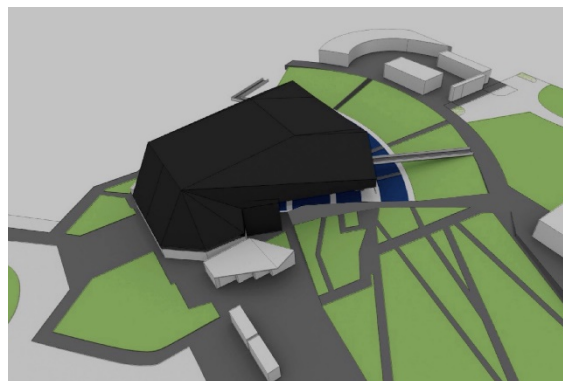
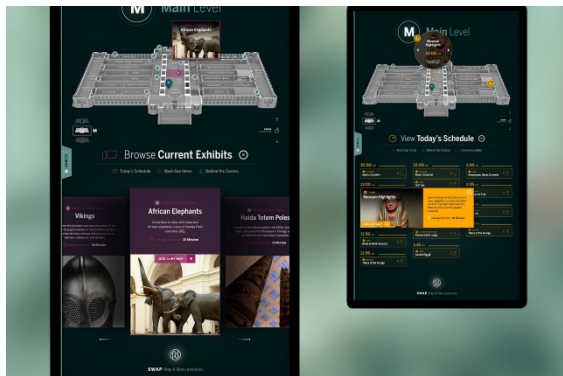
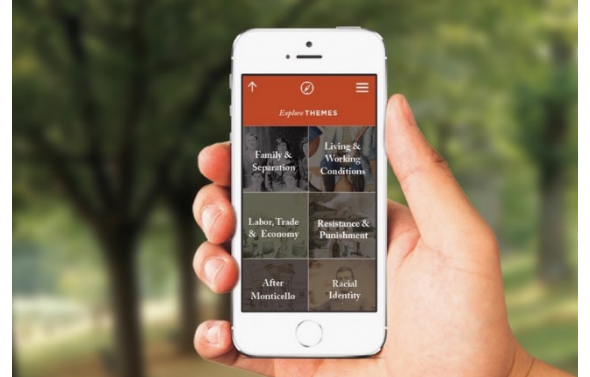
CRYSTAL BRIDGES COMMUNICATIONS STRATEGY

- Traditional and digital media
- Public Relations
- Website, Blog, eNews
- Social Media



Blue Cadet – Use of Technology in Museums

- Consistent content across digital
- Responsive organizational websites instead of apps
- Focusing on mobile experiences
- Key Performance Indicators/ROI
 - More repeat visitors (analytic)
 - Better user experience (engagement)
 - More mobile users (analytic)
 - Better visual representation (experiential)
 - Average Pages per Session
 - Average session duration
 - Bounce rate
 - Returning Visitors
 - Mobile Use
 - Awards
- Directed content based on IP location
- Time specific digital orientation stations
- Educational apps that connect to in-museum experiences
- Location-based technology (beacons)
- Interesting form factors
- Gestural experiences
- Physical takeaways
- Film first
- Experiential master plans



Destinations

- Engagement Marketing
- Shock Marketing
- Halo Magic - Creating a singular place brand for destination marketing & economic development

Engagement Marketing

“Winning people’s attention through activity that talks to their interests, that brings the Ireland brand to life, and that encourages them to interact with it and with each other.”

The Gathering Ireland 2013 is a spectacular, year-long celebration of all things Irish.



Throughout 2013, Ireland is opening its arms to hundreds of thousands of friends and family from all over the world, calling them home to gatherings in villages, towns and cities.

Communities throughout Ireland are showcasing and sharing the very best of Irish culture, tradition, business, sport, fighting spirit and the uniquely Irish sense of fun.

The Gathering

2013
+7%



↑ 14%



↑ 5%



↑ 6%



↑ 15%

Directly Attributable Travel:
250,000-275,000 additional visitors
€170 million revenue

Delivering Standout

1. An engagement focus maximises earned media
2. Connect with your consumers' interests
3. Aim for topicality
4. Ask for the share
5. Leverage the power of community
6. Think “real world” opportunities as well as digital
7. Measure the R.O.I. & then reinvest

“I have always tried to please an audience that thinks they’ve seen everything. I try to force them to laugh at their own ability to still be shocked by something.”
– John Waters



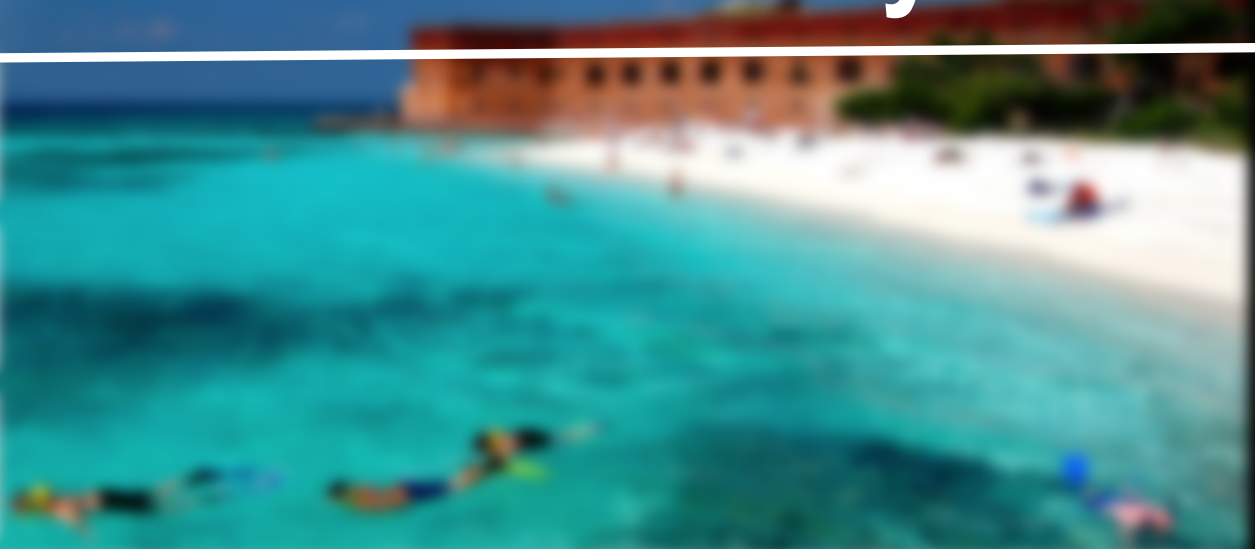
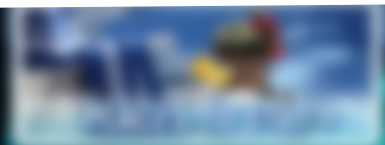
That's it. The summer. Winter, you win. Key West anyone?

Due to the unfortunately slight error, please advise you to visit The Florida Keys this week. Please come back when things blow out. Really, it's for the birds here now. (Don't want to visit there? Are you sure? Oh, click here.)

P.S. Send us a postcard.

VisitIthaca.com

Don't come to Ithaca...visit Key West instead.



Key West
The southernmost city in the continental USA

Final Takeaways – Did shock work?

- An unexpected message
- Strategize timing, slow media
- Have a plan of action
- Create follow up marketing to capitalize on media attention



POST-LAUNCH CAMPAIGN *Random Planner*



Today's Presentation



1/ Halo Magic

Research demonstrates strong lift from destination promotion on both tourism **AND** economic development image.



2/ Case Study

Developing a singular brand for tourism and economic development.

PURE *M*ICHIGAN®
Your trip begins at michigan.org

The Next Step: Direct Measurement



- Measurement of economic development impact of tourism campaigns for multiple DMO's through large-scale advertising effectiveness studies.
- Paint a picture of **HOW** and **WHY** destination marketing creates synergy with economic development.
 - *Awareness and image enhancement.*
 - *Positive impact of visiting the destination.*

The Bottom Line



PURE *M*ICHIGANSM

- Now the **SINGULAR BRAND** for **MICHIGAN**:
 - *Tourism*
 - *Economic Development.*
 - *Many marketing partners.*

U.S. Lodging Industry

Key Performance Indicator Outlook (% Change vs. Prior Year)

2015 - 2016

Outlook		
	2015 Forecast	2016 Forecast
Supply	1.2%	1.4%
Demand	2.9%	2.2%
Occupancy	1.7%	0.8%
ADR	5.1%	5.2%
RevPAR	6.8%	6.0%

FX Impact Remarkable

Market	ADR % Change \$	ADR % Change (Euro)
Boston	6.7	32.2
Chicago	8.4	34.2
Los Angeles	6.8	32.1
Miami	7.6	33.0
New York	-2.5	20.7
Berlin	-13.5	6.9
Madrid	-10.9	10.2
Paris	-14.9	5.2
Rome	-16.5	3.4

*Q2 2015, select European & US markets, ADR % Change in \$ and Euro

Lifestyle Hotels - Underlying History



TECHNOLOGY

- Decreasing cost of communication
- Increasing usage of social media
- Novelty spreads quickly



GLOBALIZATION

- Brands have become ubiquitous
- Cultural variety is diminishing
- Individuality has become increasingly rare



URBANIZATION

- More people today live in urban cores (54% in 2014 -> 66% in 2050)
- The rise in urban populations begets a rise in independent businesses
- Urban hotels have greater access to interesting local experiences
- This urban-migration has been led mostly by millennials

Why are people paying attention to them?

HIGHER ONLINE ENGAGEMENT

- This greatly affects a property's reputation

HIGHLY RESPONSIVE TO TECHNOLOGICAL CAMPAIGNS

- Can have greater reaches

MUCH HIGHER BRAND LOYALTY

Poised to **TAKE OVER** the **BULK OF TRAVEL SPENDING** in the coming years

Creating a Unique Identity

Developing different layers of texture on property

Appealing to all the senses to curate a rich profile

- **Visually** – art programs, uniforms, artifacts that tell a story
- **Sound** – DJ-curated music
- **Smell** – unique scent
- **Feel** – custom terry & linen
- **Taste** – sourced coffee & mini-bar programs

Digital Disruption: The Sharing Economy

Arun Sundararajan

- Consumerization of digital – companies built technology for consumers and businesses adapted to this.
- Platforms like Airbnb, Uber, Etsy, and Funding Circle - early examples of a new way of organizing economic activity that we commonly refer to as the “sharing economy” – created by technology and socio-economic drivers (i.e., ecological concerns)
- Billions of venture capital dollars power new business models that blur the lines between the personal and the professional, melding market economies and gift economies into a new form of decentralized, peer-to-peer marketplace, crowd-based capitalism.
- A way to use things more efficiently but changing the nature of a job - blurring the lines between casual and full-time work.
- The shifting role of trust and brand
- The challenges raised when consumption experiences are moderated by one’s peers rather than by a dedicated salesforce

Who is sharing?

44% of adults are familiar with the sharing economy

6% of the US population has participated as a consumer in hospitality sharing

18% of adults have participated in the sharing economy as a **consumer**

1.4 % of the US population has participated as a provider in hospitality sharing

7% of adults have participated in the sharing economy as a **provider**



The more familiar consumers are with these services, the more excited they feel.

Trust above all



64%

of customers say that in the sharing economy, peer regulation is more important than government regulation



72%

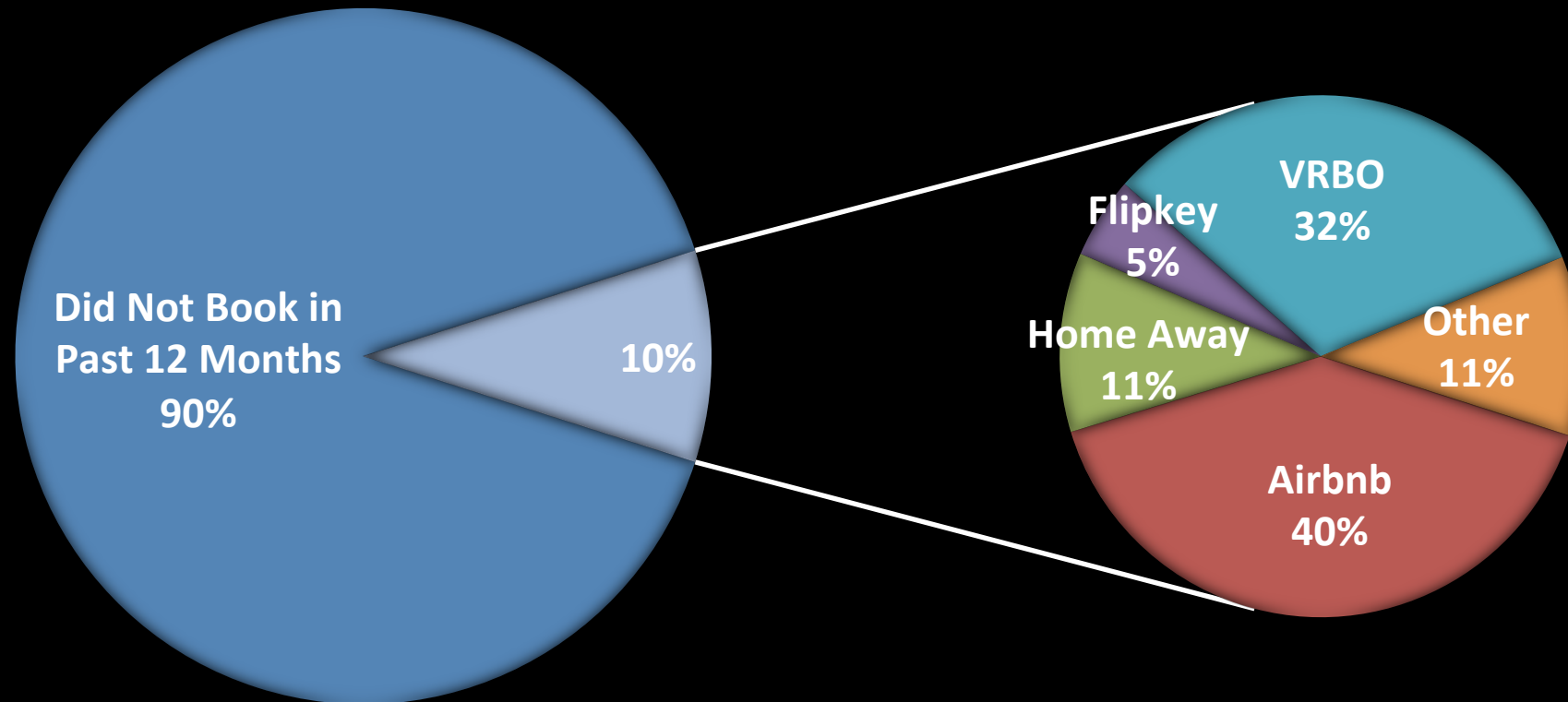
Feel that the sharing economy experience is not consistent



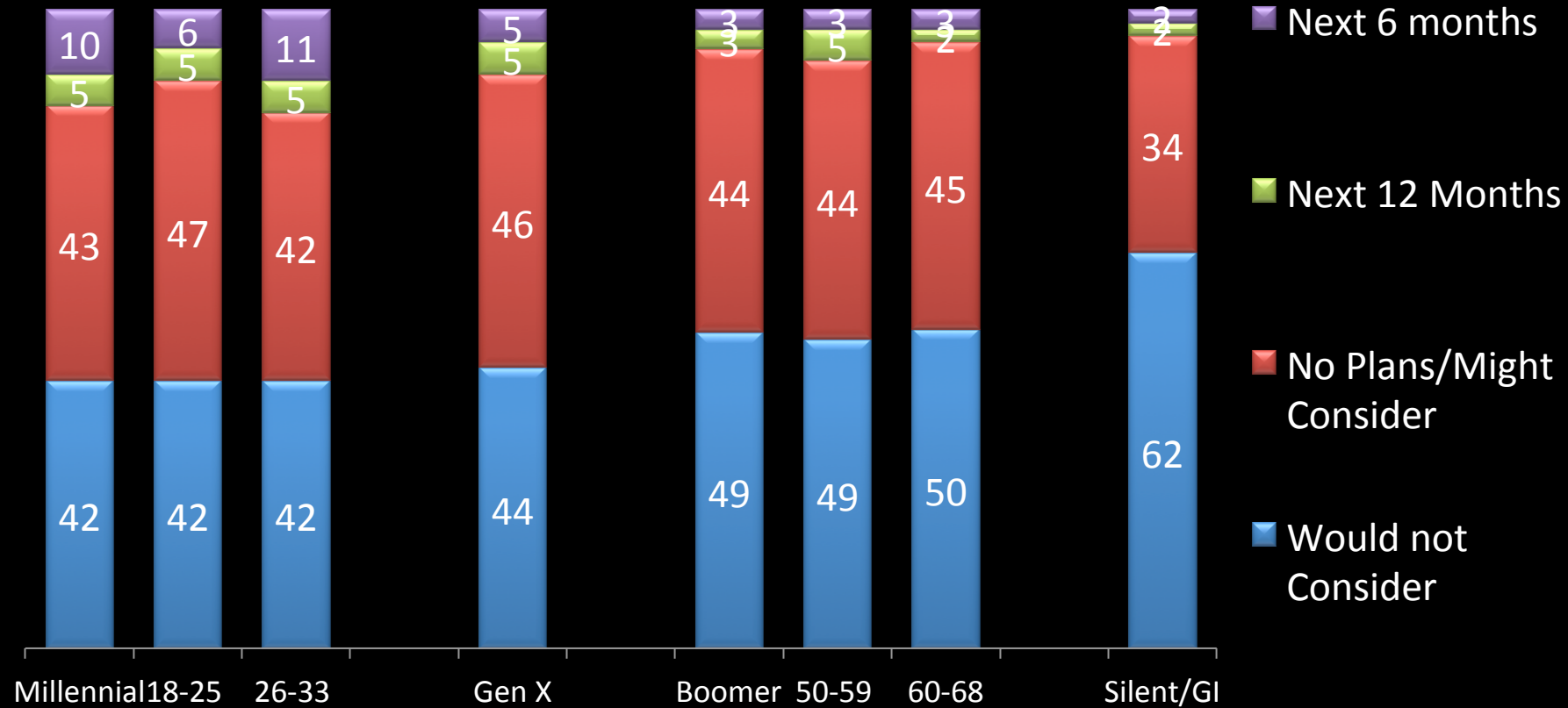
69%

Will not trust sharing economy companies until they are recommended by someone they trust

Booked With Short Term Rental Company



Short Term Rentals definitely a consideration



Size and Scope

Airbnb

A wide range of listings

More than **1.5 million** listings (e.g. homes, apartments, houseboats, treehouses) in more than **34,000 cities** in **190 countries.**

Source: Airbnb



Legislative Hurdles

Hoteliers want a level playing field

“Right now there is an **un-level playing field that is compromising consumer safety, endangering the character and security of residential neighborhoods around the country, and changing the housing market in some negative ways.”**

—Vanessa Sindors, AH&LA

Source: Federal Trade Commission (FTC) “Sharing Economy” Workshop

Legislative Hurdles

Hoteliers lobby for change on 3 primary pillars

1) Fire and life safety

Homes/apartments are not held to the same safety standards as hotels

2) Housing displacement

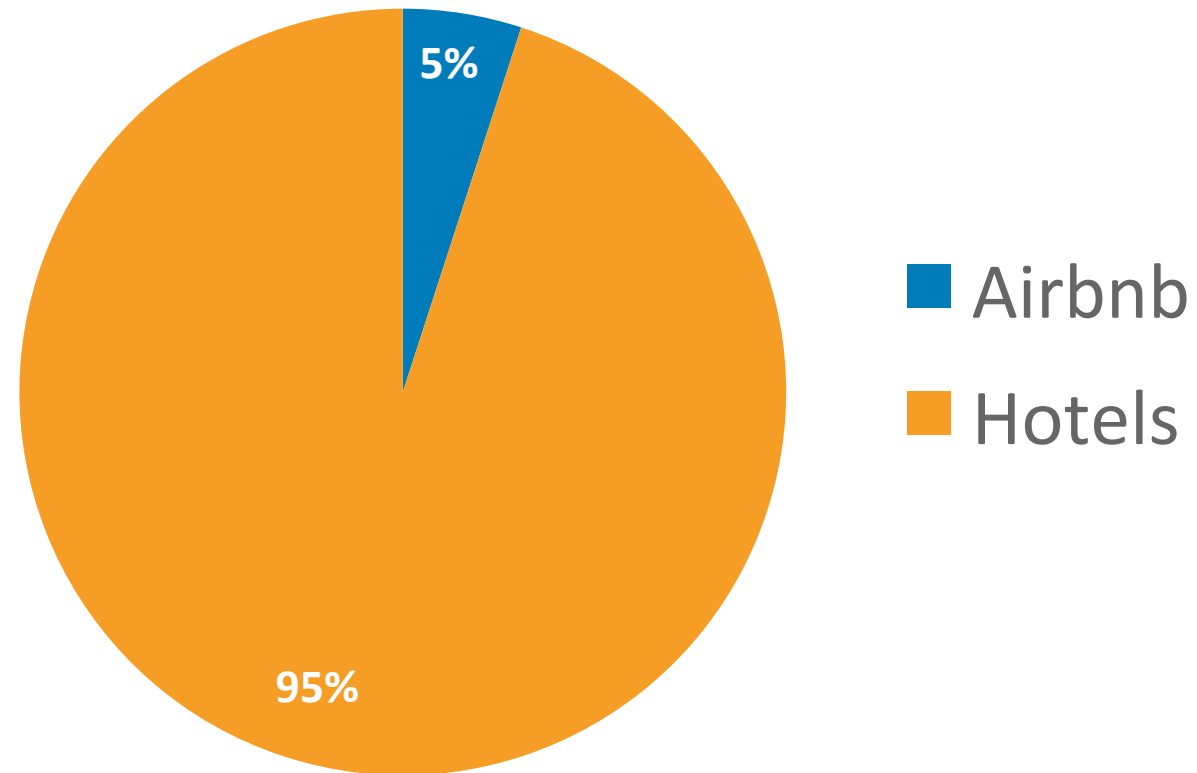
“Airbnb landlords” are taking housing off the market

3) Taxes

Short-term unit owners are not subject to the same taxes as are hoteliers

(A Different) Case Study: NYC

Q2 rooms revenue distribution



Source: Airdna, STR and PKF Hospitality Research

Hospitality implications



6% of the US population has participated as a consumer in the hospitality sharing economy

Keep in mind:

- Customization and local flavor are at a premium
- Identify underutilized assets – and find ways to leverage and optimize them
- Solidify reputation management
- Embrace your own disruption

Key disruptive levers to consider



Create marketplaces

Develop a mitigation strategy

Engage in sharing your own asset base

Effectively tap talent

Speak up in shaping regulatory and policy frameworks

Expand the brand through shared economy experiences

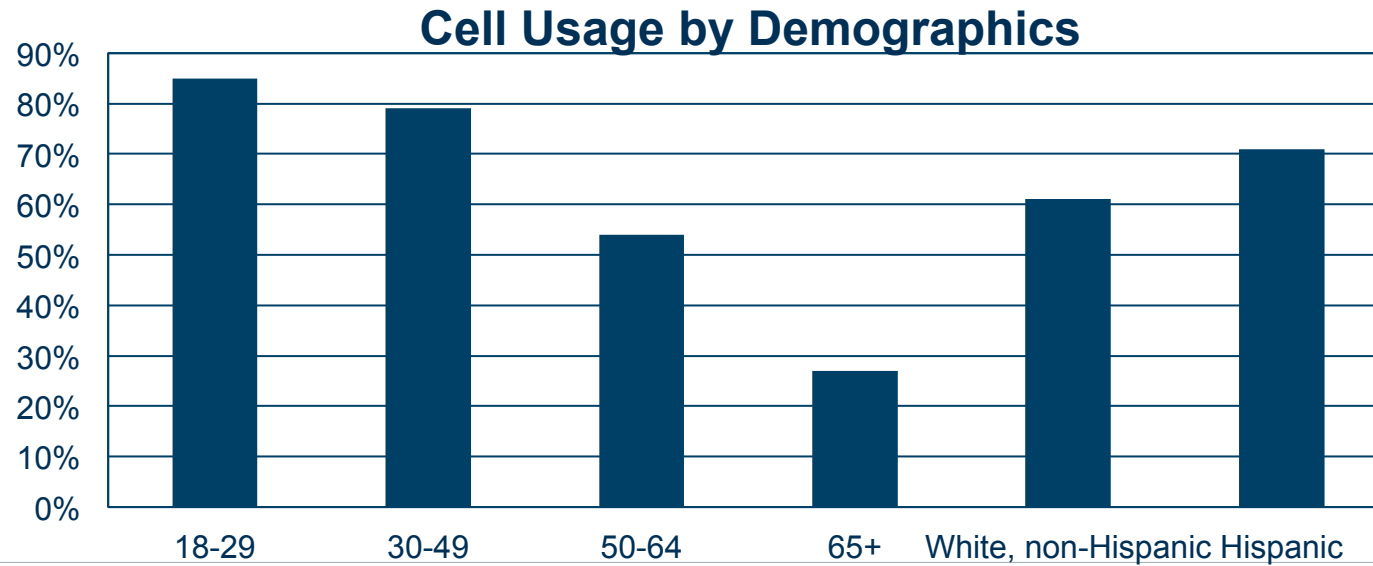
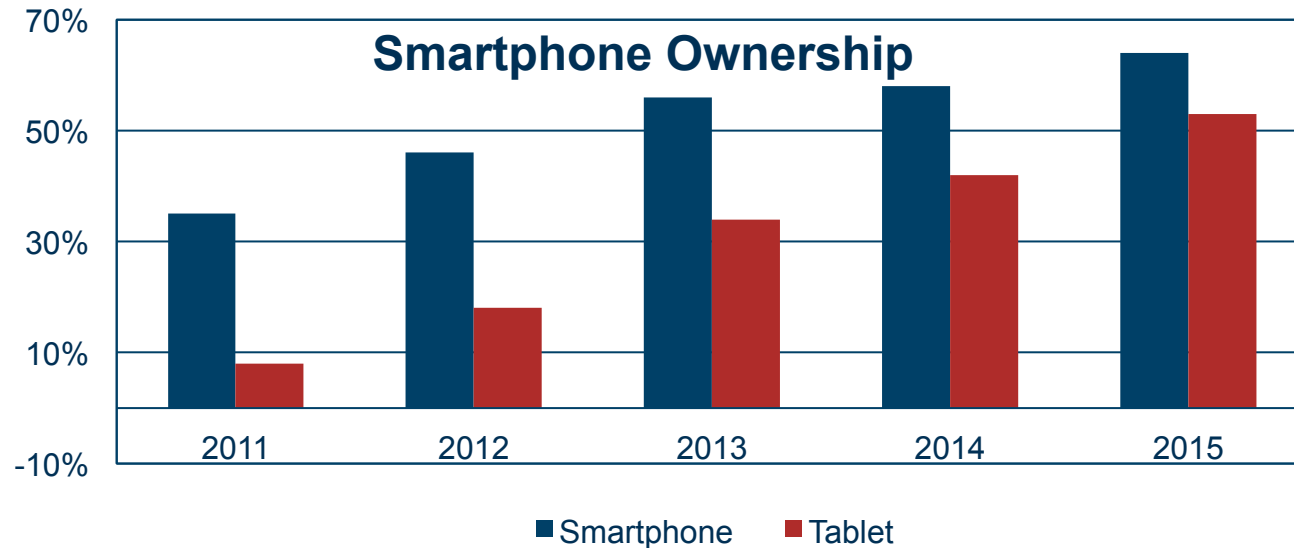
Never settle for stable

Reaching Consumers who are Technology Enabled



- According to the Pew Research Center, 90% of Americans have cell phones, 64% have a smartphone and 42% own a tablet computer.
- By 2017, more than 3 billion people will have mobile internet access.
- Wifi is already the most important hotel amenity for both leisure and business travelers....
- And, it is rapidly increasing in importance at U.S. attractions.
- Mobile internet not only impacts how travel is sold, but how we consumer and experience the attraction and the destination.

Digital Demand

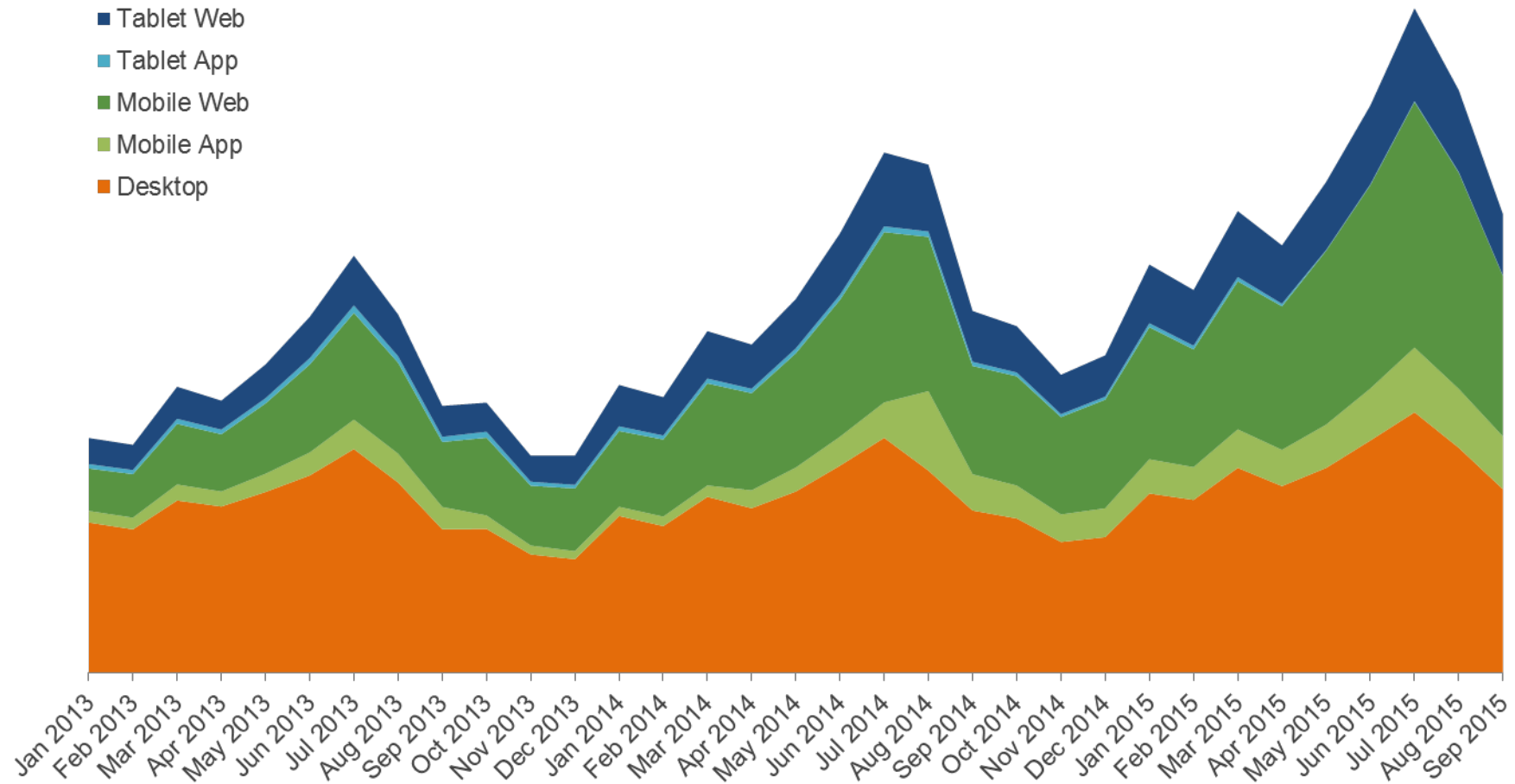


Source: Pew Research, 2015



US Destination Views By Device Type

- Desktop usage remains strong while activity on mobile has grown rapidly in the past two years



Hispanics are Younger, Digitally Savvy



TREND INSIGHTS

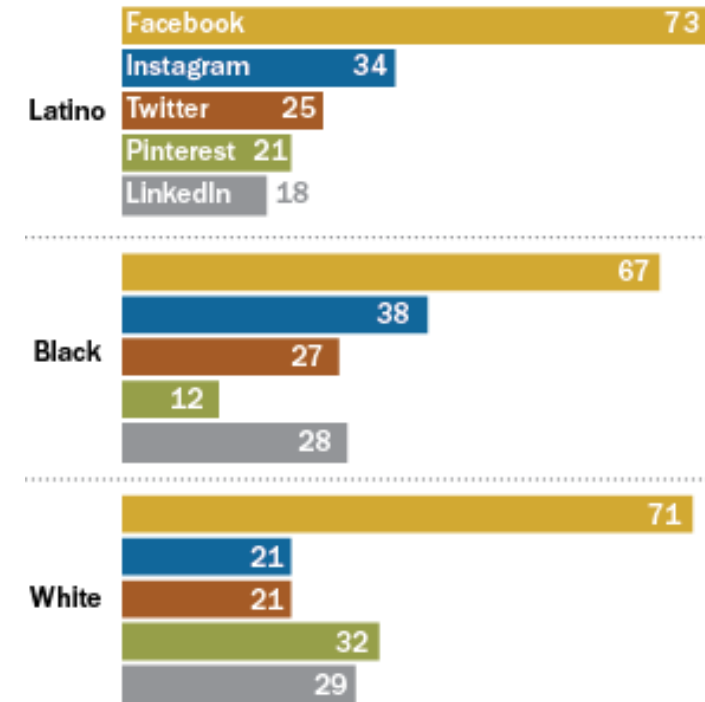
A Younger Demographic

Hispanics are becoming a larger segment of all age cohorts in the U.S., but today, the Hispanic population is younger than the population overall.

- » In 2013, the median age for Hispanics in the U.S. was 27, compared to 42 for whites.¹³⁹
- » In 2012, 47 percent of the U.S. population was under 35; for Hispanics, more than six in 10 (62%) were under the age of 35.¹⁴⁰

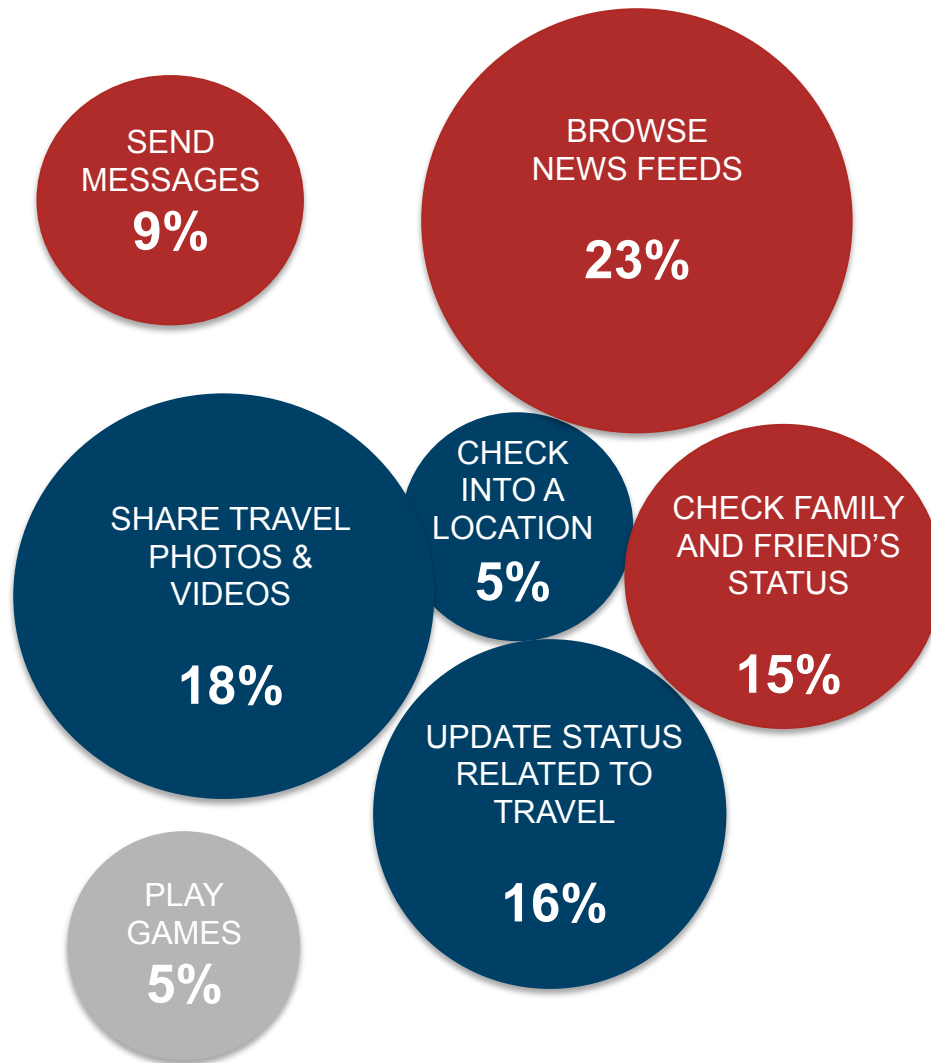
Latinos and Blacks More Likely Than Whites to Use Instagram, Less Likely to Use Pinterest

% of internet users who use each social media site, by race and ethnicity

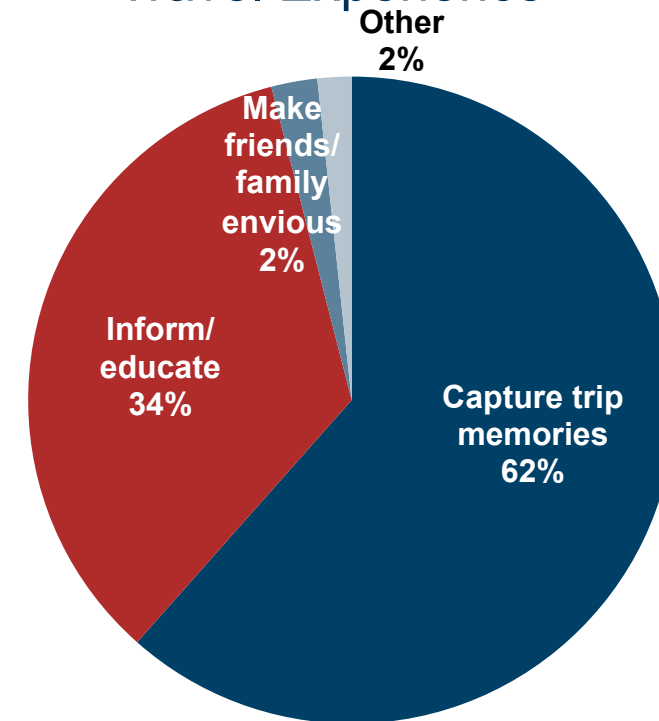


Source: Pew Research, 2015

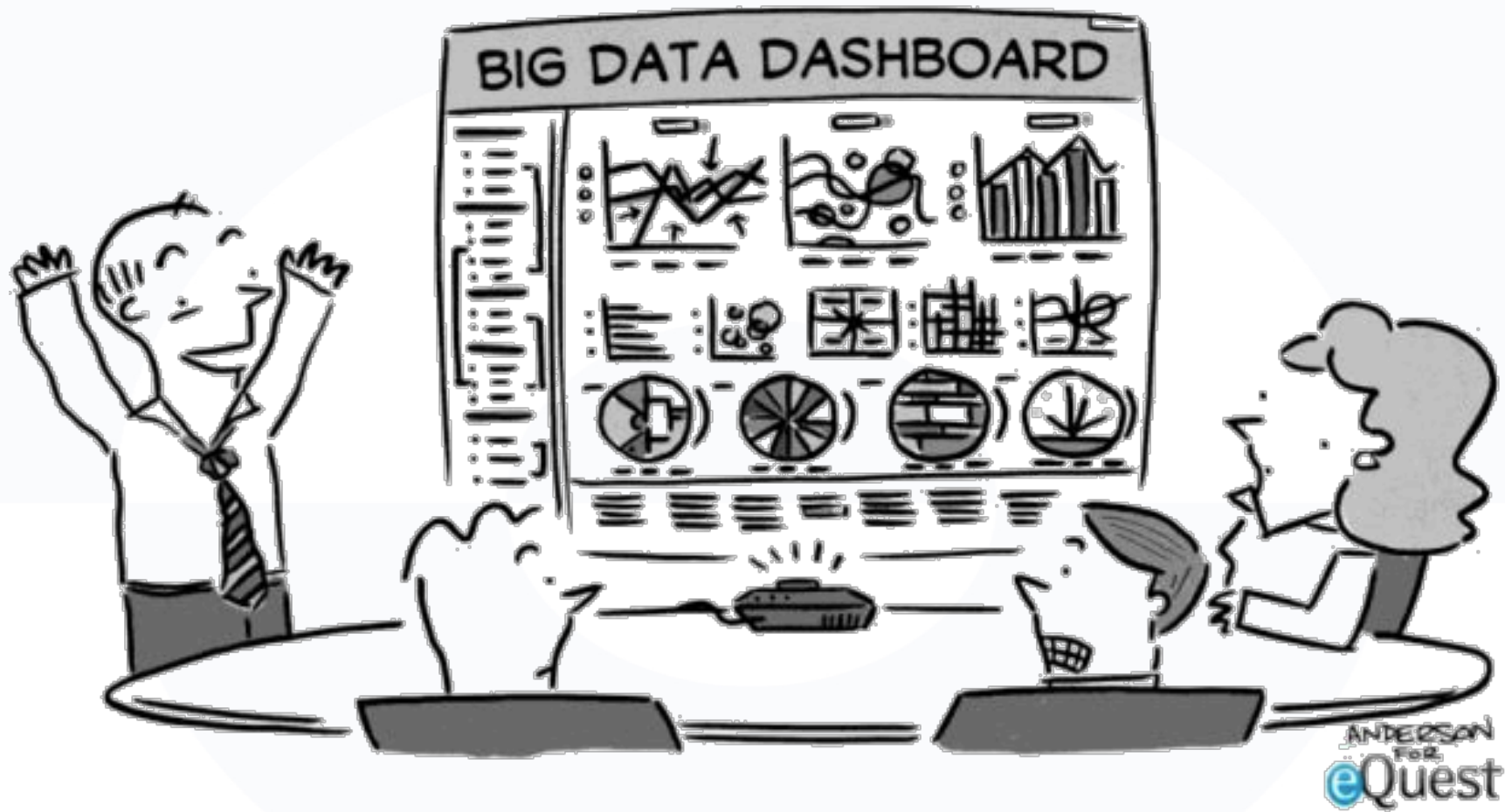
Four in 10 Access Social Media to Share Travel Experience



Primary Motivation for Sharing Travel Experience



Source: U.S. Travel Association; TNS, 2014



"After careful consideration of all 437 charts, graphs, and metrics, I've decided to throw up my hands, hit the liquor store, and get snookered. Who's with me?!"

The Next Frontier



🎯 Basis for competition...

- Productivity growth
- Innovation
- Consumer surplus

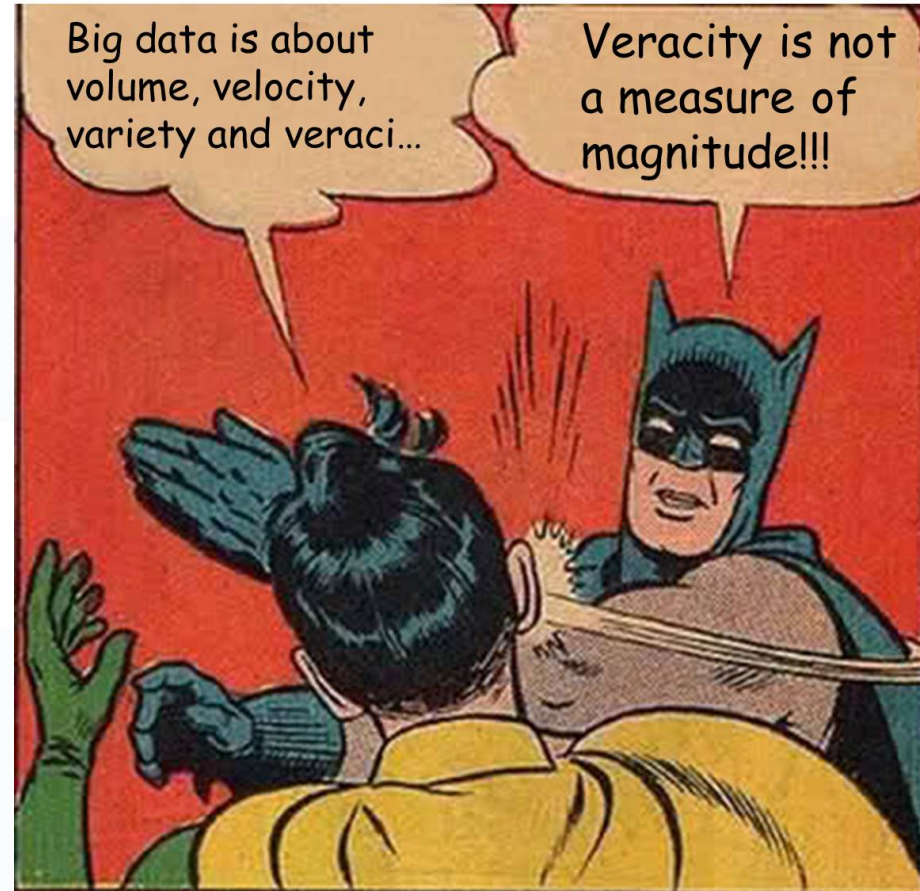
🎯 Exponential data growth...

- Multimedia
- Social Media
- Internet of Things

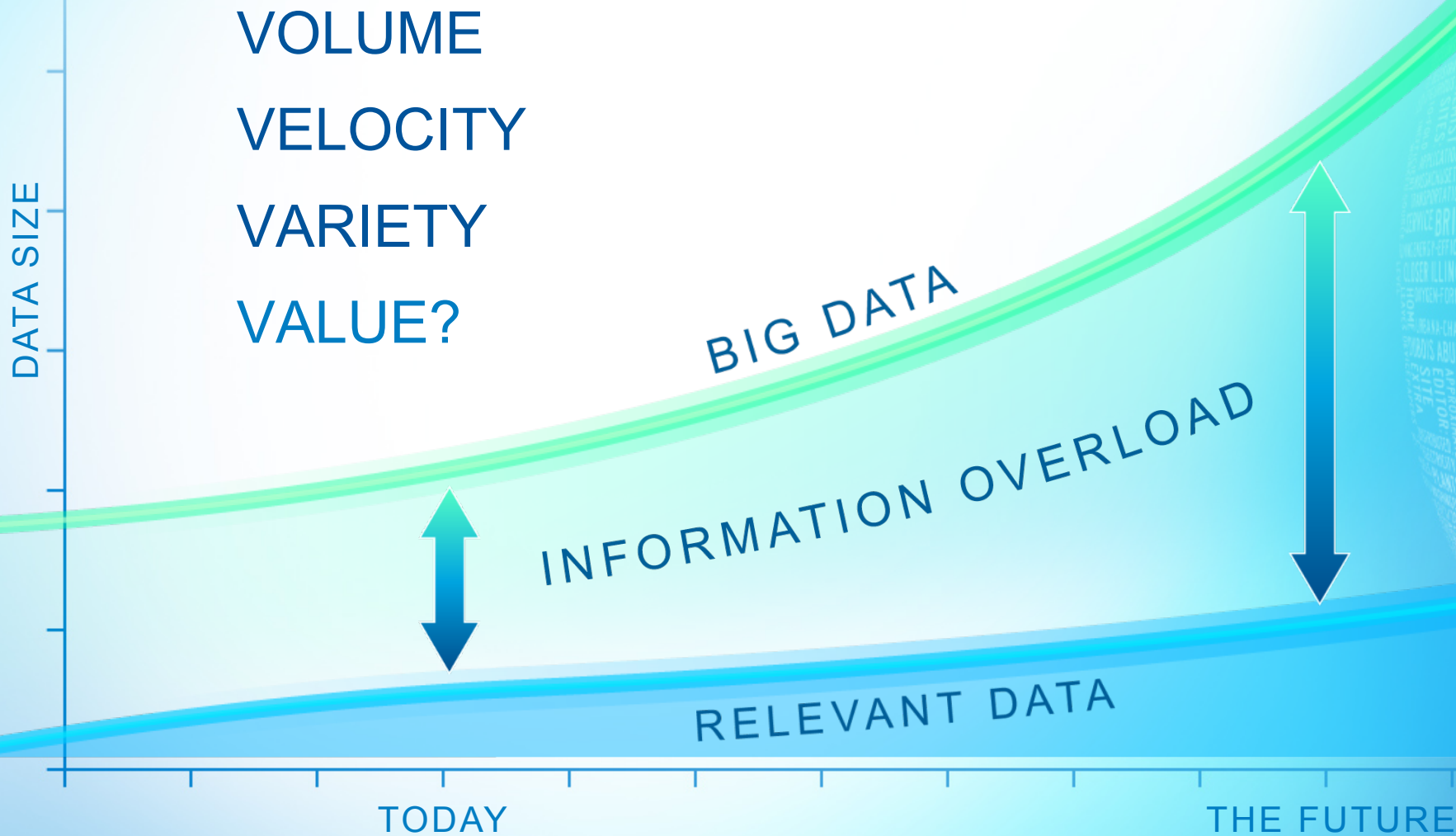
Picture Source: Thirst for Kellogg Magazine, Northwestern University

Big Data Characteristics

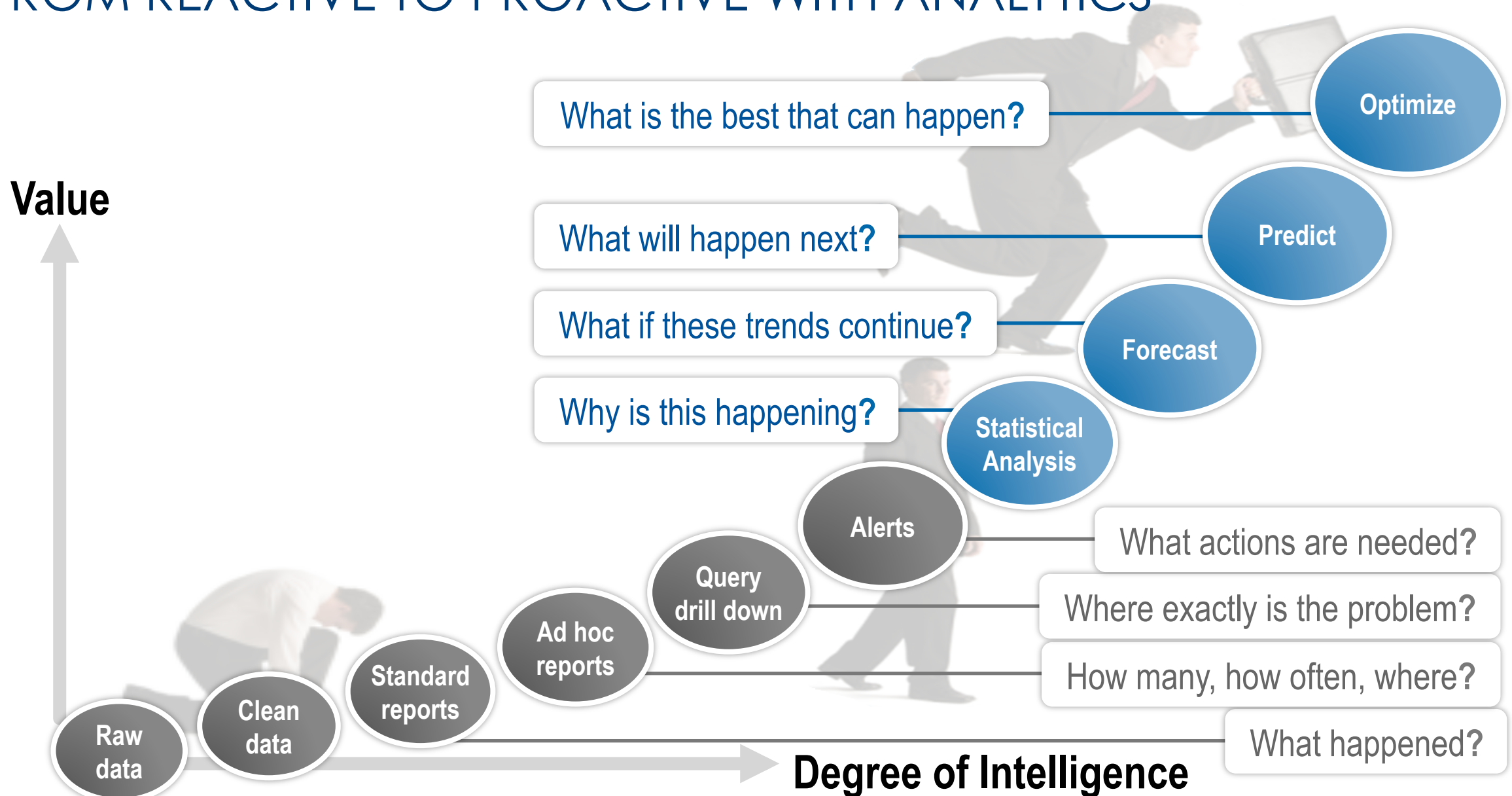
- 🎯 Volume—too many bytes
- 🎯 Velocity—too fast at too high a rate
- 🎯 Variety—too many sources



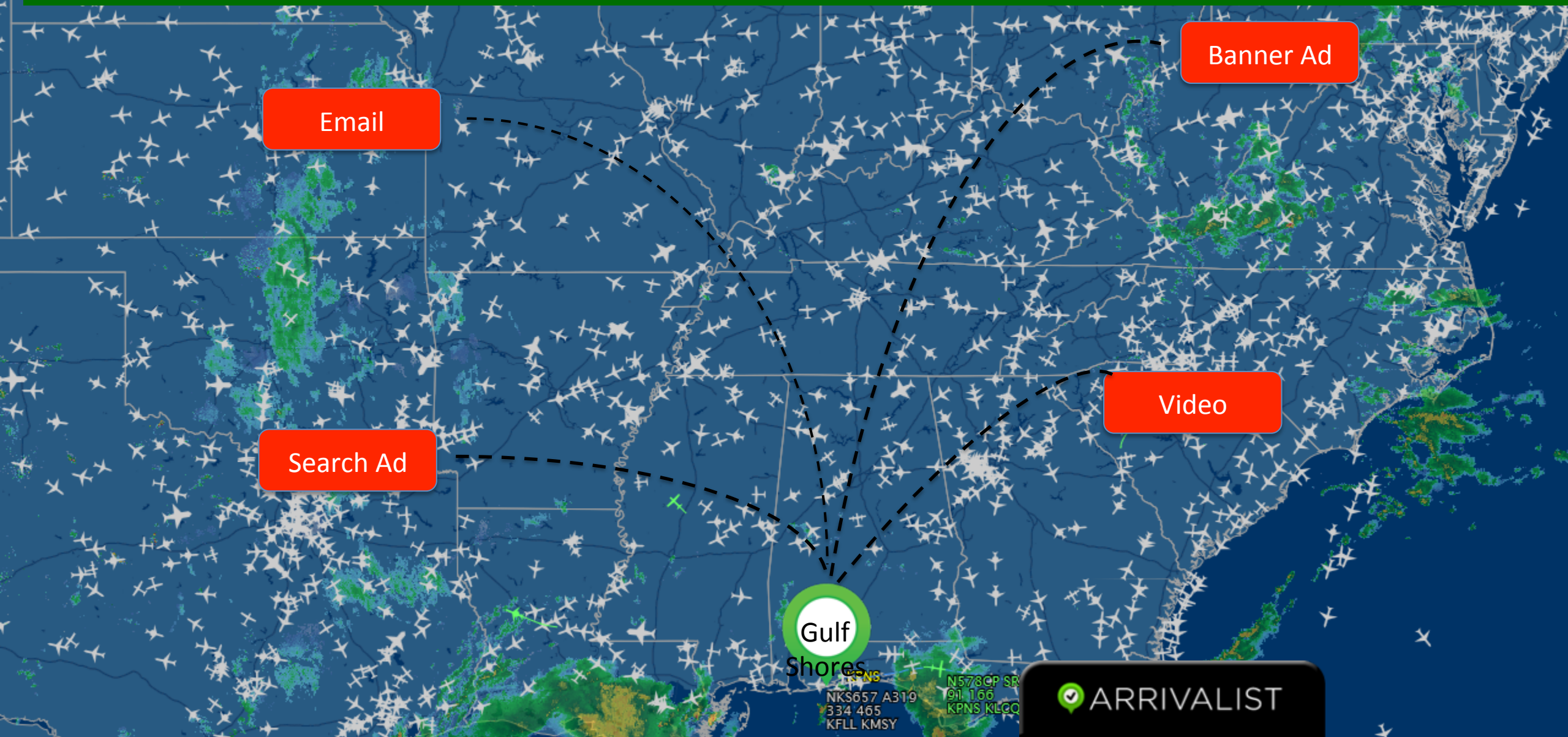
OPPORTUNITIES IN THE BIG DATA ERA



FROM REACTIVE TO PROACTIVE WITH ANALYTICS



THE QUESTION: Where do visitors come from and which ads bring them?



BEST PRACTICES: WHAT WE'VE LEARNED

- Unique Ways to view your data that you don't even know about yet.
- Let the data Surprise you. The Importance of keeping an open mind because there will be surprises and anomalies
- Be willing to challenge preconceived notions about consumer travel behavior
- New technologies allow what was previously un-trackable to be analyzed (in real time)

Value of Futures Research and Way of Thinking

- J. Walker Smith: Look for the vanishing point not just by scanning the environment for the next big thing but also by looking for the “holes in the canopy” – those things that are getting weaker and going away – allowing sunlight to get in and allow new things to grow.
- Rohit Talwar: Need a sense of the bigger picture, need to think about possible scenarios and how to prepare for them now. Need to think short, mid, and longer-term. Pursue speed and exponential thinking.

‘Future Proofed’ Organisations Work on 3 Horizons in Parallel



1-12 Months

**Operational
Excellence**



1-3 Years

**Search for
Growth**



4-10+ Years

**Creating
the Future**

A Universe of Data... and it's Used Poorly

Do we Have a Digital and Global Mindset?

2015 Marketing Outlook Forum Wrap-Up Panel

Thank you!



Sheila Flanagan



Adam Sacks



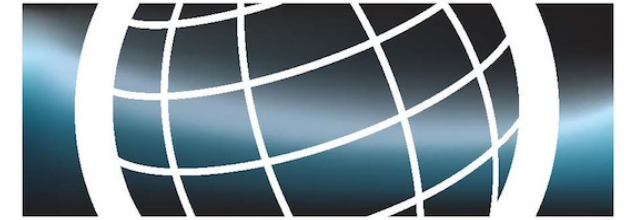
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