THE STUFF YOU'RE GOING TO HEAR ABOUT

- Consumer Post-COVID Trends
- Travel Evolution
- Visitation Intelligence
But first, we'd like to say hi.

(we're pretty excited to be here)
We love helping destinations find their perfect traveler & travelers make their perfect memories.

It absolutely gives us the warm fuzzies.

And we're pretty dang good at it!
So, how do we capture the attention of often fickle visitors in a post-COVID world when consumption, entertainment, and social habits have changed.
67% of consumers intend to spend more time with entertainment post-COVID than they did prior.
Compared to pre-pandemic, consumers will consume more...

- **51%** for Live Sports
- **49%** for Social Media/Online Video Content
- **41%** for Podcasts
- **41%** for Movies
- **40%** for Books/Audiobooks
- **40%** for Video Games/Esports
- **37%** for Music
- **32%** for TV Shows

Legend:
- Yellow: Will consume more
- Gray: Will consume same amount
- White: Will consume less
“Entertainment Explorers”
7 in 10
Turned to new formats, platforms, or genres

“Fervent Fans”
1 in 2
Became more engaged with entertainment and strengthened their fandom
Escapism

Education

Activism
60% of Americans say remote work has encouraged them to work wherever and take more workcations...

...and parents are more likely to take a workcation.
THE SECOND THING

Demographics are changing with 151 million millennials and GenZ with $350B in spending power
“can i travel”
+800%

“travel to”
+100%

“hotel booking app”
+100%
And they are visiting DMO websites

Website Traffic
Organic search sessions to DMO/CVB websites, 7-day moving average

Source: Simpleview (250+ U.S. DMOs)
65% of Next Gen travelers are inspired by digital content to plan a trip.

43% are seeking experiences that are new, unique, and authentic to the region.
Escape and Relax (51%)
Adventure (38%)
So, what do we do with these insights?
TAKEAWAYS

1) Travel is increasingly personal, lean into consumer travel intentions to speak to them directly

2) Help travelers discover their journey through visual travel journeys, itineraries, and stories to discover

3) Travel is a force for good, embrace the diversity and history of your region to build connections for the future

4) Leverage the creator economy, consumers seek deeper engagement to satisfy their fandom - they are more open to adopting new behaviours
Now you have some insights into the consumer, but what do we know about the Idaho Visitor?
OUT-OF-STATE VISITORS

2021 Out-of-State Visitors

- Lower concentration of visitors across core markets
- Increasingly, a greater degree of travelers are flying to Idaho
2021 Out-of-State Visitors

- Lower concentration of visitors across core markets
- Decline in SF and Billings DMAs
- Growth in gateway DMAs: PHX, DEN, DFW, ATL, LAS, ORD, MSP
2021 Winter Visitation

- Visitation share of Top 5 DMAs dropped from 49.4% to 38.8%
- Emerging fly markets made up 4.3% of visitation share
- 10.6% increase in other DMAs
2021 Summer Visitation

- Fly markets reduced drive market concentration
- Emerging fly markets made up 5.2% of visitation share
- 7.6% increase in other DMAs

<table>
<thead>
<tr>
<th>DMA</th>
<th>Visitation</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salt Lake City, UT</td>
<td>56.65K</td>
<td>15.1%</td>
</tr>
<tr>
<td>Seattle-Tacoma, WA</td>
<td>29.93K</td>
<td>8.0%</td>
</tr>
<tr>
<td>Spokane, WA</td>
<td>22.46K</td>
<td>6.0%</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>18.65K</td>
<td>5.0%</td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>13.38K</td>
<td>3.6%</td>
</tr>
<tr>
<td>Yakima-Pasco-Richland-Kennewick, WA</td>
<td>9.67K</td>
<td>2.6%</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>9.57K</td>
<td>2.6%</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>8.27K</td>
<td>2.2%</td>
</tr>
<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>7.38K</td>
<td>2.0%</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>6.51K</td>
<td>1.7%</td>
</tr>
<tr>
<td>Missoula, MT</td>
<td>6.02K</td>
<td>1.6%</td>
</tr>
<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>5.1K</td>
<td>1.4%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>5.03K</td>
<td>1.3%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>4.91K</td>
<td>1.3%</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>4.66K</td>
<td>1.2%</td>
</tr>
<tr>
<td>Other</td>
<td>166.75K</td>
<td>44.5%</td>
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</table>
**REGIONAL VISITATION**

**Idaho Statewide:**
Winter: 2.8 LOS (WA, UT, CA, TX, OR)  
Summer: 3.5 LOS (WA, UT, CA, OR, TX)

**Region 1:**
Winter: 2.7 LOS (WA*, MT, OR, CA, TX)  
Summer: 3.5 LOS (WA*, OR, MT, CA, TX)

**Region 2:**
Winter: 2.7 LOS (WA*, OR, TX, CA, AZ)  
Summer: 3.4 LOS (WA*, OR, CA, AZ, MT)

**Region 3:**
Winter: 2.9 LOS (WA, UT, OR, CA, TX)  
Summer: 3.7 LOS (WA, UT, OR, CA, TX)

**Region 4:**
Winter: 2.8 LOS (WA, UT, CA, TX, NV)  
Summer: 3.5 LOS (WA, UT, CA, OR, NV)

**Region 5:**
Winter: 2.4 LOS (UT*, AZ, MT, WY, CA)  
Summer: 3.2 LOS (UT*, AZ, CA, TX, WY)

**Region 6:**
Winter: 2.9 LOS (UT*, MT, CA, WY, AZ)  
Summer: 3.8 LOS (UT, CA, MT, TX, AZ)

**Region 7:**
Winter: 2.9 LOS (WA, CA, UT, MT, OR)  
Summer: 3.4 LOS (UT, CA, MT, WA, CO)

LOS: Length of Stay in days  
* Represents more than 20%
## Increasing Length of Stay

<table>
<thead>
<tr>
<th>Metro Updated</th>
<th>Avg LOS (days)</th>
<th>Avg # of trips</th>
<th>Unique Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa-St. Petersburg (Sarasota), FL</td>
<td>3.81</td>
<td>1.74</td>
<td>5,776</td>
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<tr>
<td>Houston, TX</td>
<td>3.65</td>
<td>1.77</td>
<td>9,333</td>
</tr>
<tr>
<td>Washington, DC (Hagerstown, MD)</td>
<td>3.64</td>
<td>1.80</td>
<td>5,270</td>
</tr>
<tr>
<td>Orlando-Daytona Beach-Melbourne, FL</td>
<td>3.55</td>
<td>1.84</td>
<td>6,327</td>
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<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>3.52</td>
<td>1.90</td>
<td>14,549</td>
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<tr>
<td>New York, NY</td>
<td>3.50</td>
<td>1.79</td>
<td>9,049</td>
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<tr>
<td>Atlanta, GA</td>
<td>3.47</td>
<td>1.74</td>
<td>10,696</td>
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<tr>
<td>Kansas City, MO</td>
<td>3.42</td>
<td>1.87</td>
<td>5,249</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>3.42</td>
<td>2.13</td>
<td>10,112</td>
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<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>3.30</td>
<td>1.88</td>
<td>9,900</td>
</tr>
<tr>
<td>Reno, NV</td>
<td>3.29</td>
<td>2.40</td>
<td>6,717</td>
</tr>
<tr>
<td>San Francisco-Oakland-San Jose, CA</td>
<td>3.27</td>
<td>2.20</td>
<td>8,459</td>
</tr>
<tr>
<td>Sacramento-Stockton-Modesto, CA</td>
<td>3.27</td>
<td>2.59</td>
<td>9,369</td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>3.23</td>
<td>2.47</td>
<td>24,810</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>3.20</td>
<td>2.41</td>
<td>16,988</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>3.15</td>
<td>2.56</td>
<td>11,650</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>3.14</td>
<td>2.81</td>
<td>33,437</td>
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<tr>
<td>Denver, CO</td>
<td>3.08</td>
<td>2.49</td>
<td>18,742</td>
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<tr>
<td>Seattle-Tacoma, WA</td>
<td>3.04</td>
<td>2.50</td>
<td>54,252</td>
</tr>
<tr>
<td>Albuquerque-Santa Fe, NM</td>
<td>3.03</td>
<td>2.47</td>
<td>5,459</td>
</tr>
</tbody>
</table>
So, what next?
1) Review insights for your region on the "Idaho Mobility Dashboard".

2) Prioritize your audiences based on LOS, emerging markets, and seasonality shifts.

3) Shift to travel intents to expand geographic constraints.
THANKS FOR LISTENING

(we’re finally done now 😊)