MADDEN
CONNECT PEOPLE TO PLACES

RESEARCH
UPDATE

OCTOBER 2021

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 ARE PEOPLE
WHO GEEK OUT ABOUT TRAVEL

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
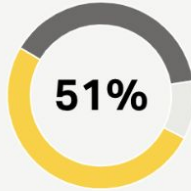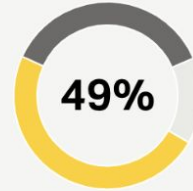
yet always fabulous

67%
of consumers intend to spend more time with entertainment post-COVID than they did prior
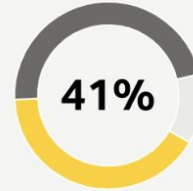
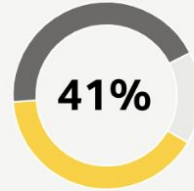**Compared to pre-pandemic, consumers will consume more…**

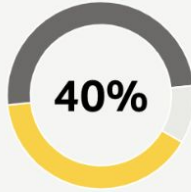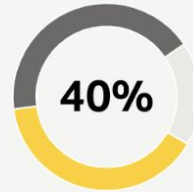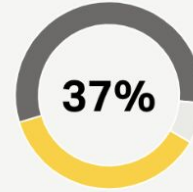|			
51%	**49%**	**41%**	**41%**
LIVE SPORTS	SOCIAL MEDIA/ONLINE VIDEO CONTENT	PODCASTS	MOVIES
40%	**40%**	**37%**	**32%**
BOOKS/AUDIOBOOKS	VIDEO GAMES/ESPORTS	MUSIC	TV SHOWS
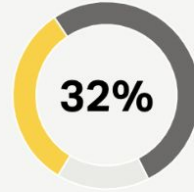
- Will consume more
- Will consume same amount
- Will consume less

"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.

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

Legend: 2019, 2020, 2021
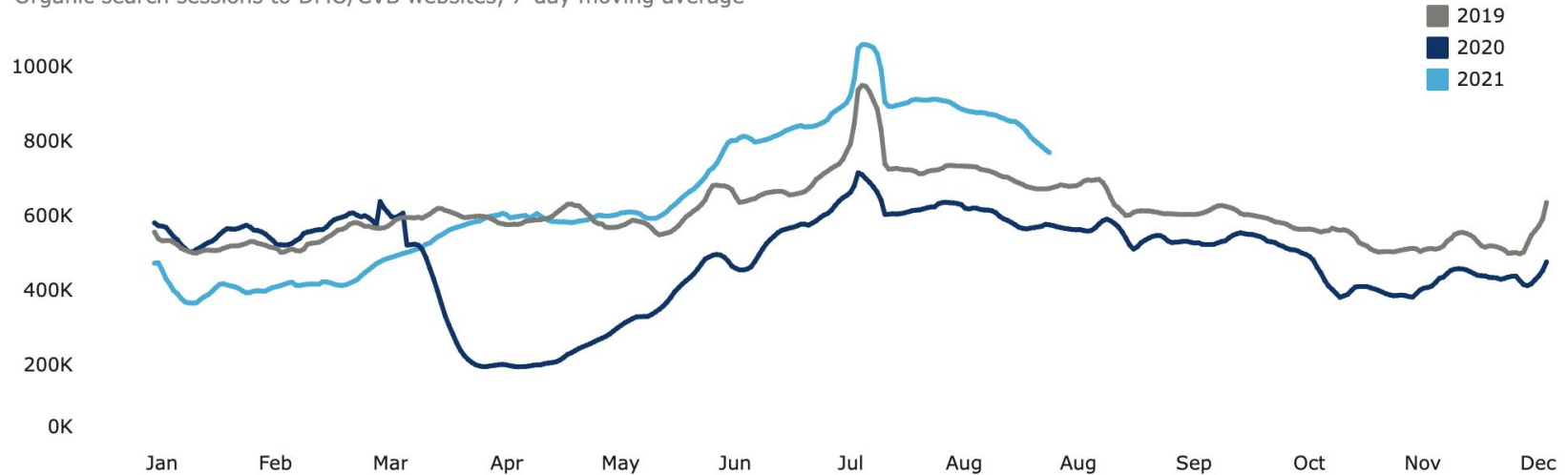
Source: Simpleview (250+ U.S. DMOs)

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 <u>travel intents</u> to speak to them directly

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

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

4) Leverage the <u>creator economy</u>, 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
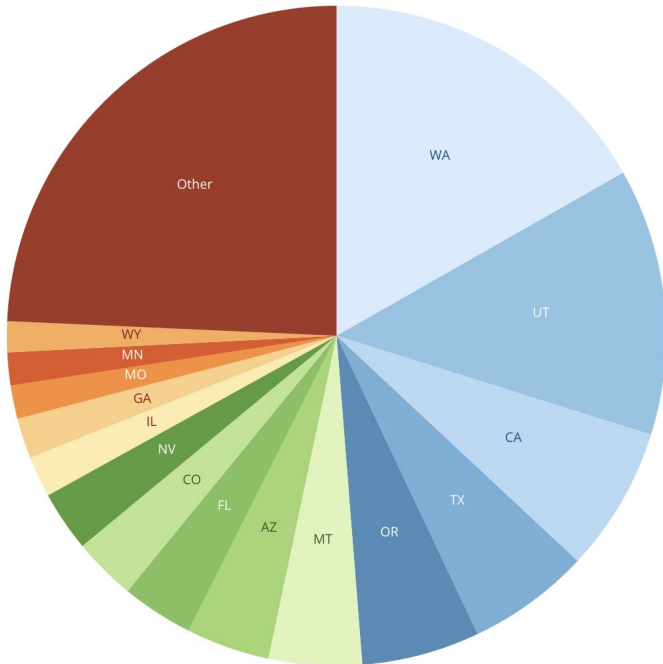
WA		120.6K	16.8%
UT		94.01K	13.1%
CA		51.1K	7.1%
TX	⬆	43.19K	6.0%
OR	⬇	41.63K	5.8%
MT	⬇	32.83K	4.6%
AZ		29.43K	4.1%
FL	⬆	25.3K	3.5%
CO	⬇	22.17K	3.1%
NV		21.27K	3.0%
IL	⬆	14.43K	2.0%
GA	⬆	14.24K	2.0%
MO	⬆	11.73K	1.6%
MN	⬇	11.59K	1.6%
WY	⬇	10.86K	1.5%
Other		174.69K	24.3%

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

OUT-OF-STATE DMAs

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Voyage
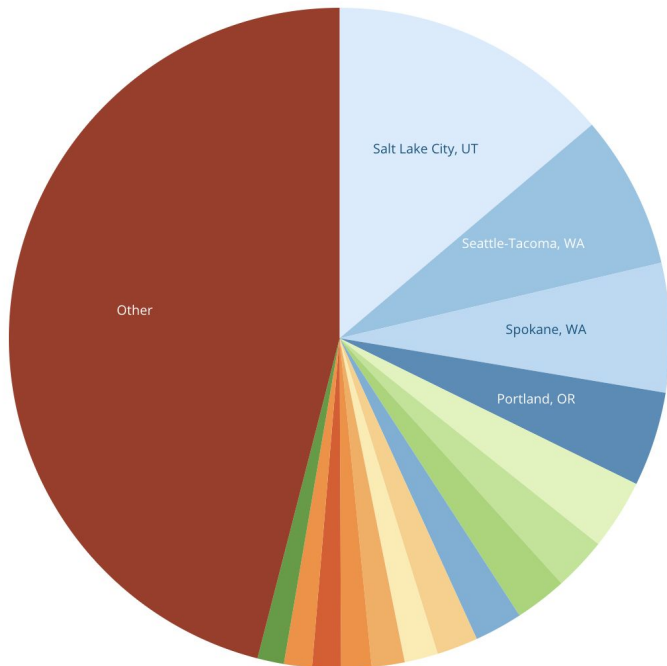
● Salt Lake City, UT		99.89K	13.8%
● Seattle-Tacoma, WA		54.26K	7.5%
● Spokane, WA		45.65K	6.3%
● Portland, OR		33.44K	4.6%
● Phoenix, AZ		24.81K	3.4%
● Denver, CO	⬆	18.74K	2.6%
● Yakima-Pasco-Richland-Kennewick, WA		18.4K	2.5%
● Los Angeles, CA	⬇	16.99K	2.4%
● Dallas-Ft. Worth, TX	⬆	14.55K	2.0%
● Missoula, MT	⬇	11.83K	1.6%
● Las Vegas, NV	⬆	11.65K	1.6%
● Atlanta, GA	⬆	10.7K	1.5%
● Chicago, IL	⬆	10.11K	1.4%
● Minneapolis-St. Paul, MN	⬆	9.9K	1.4%
● Sacramento-Stockton-Modesto, CA	⬇	9.37K	1.3%
● Other		332.54K	46.0% ⬅

2021 Out-of-State Visitors

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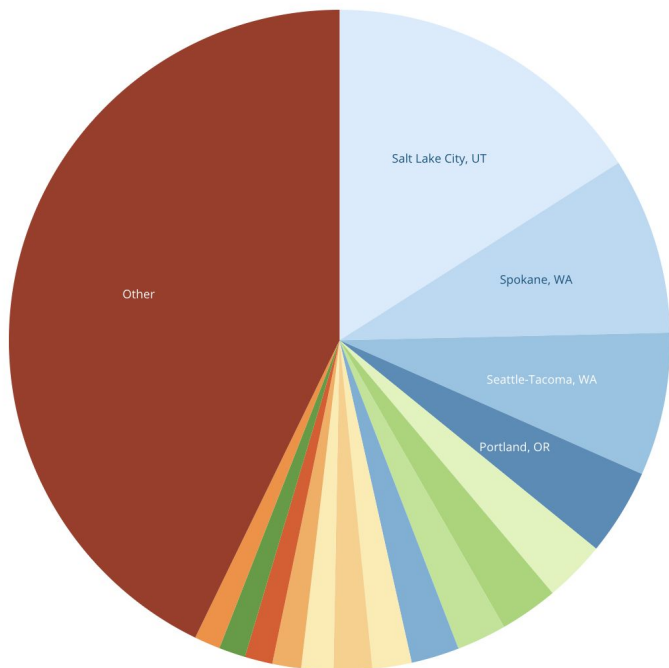- Decline in SF and Billings DMAs
- Growth in gateway DMAs: PHX, DEN, DFW, ATL, LAS, ORD, MSP
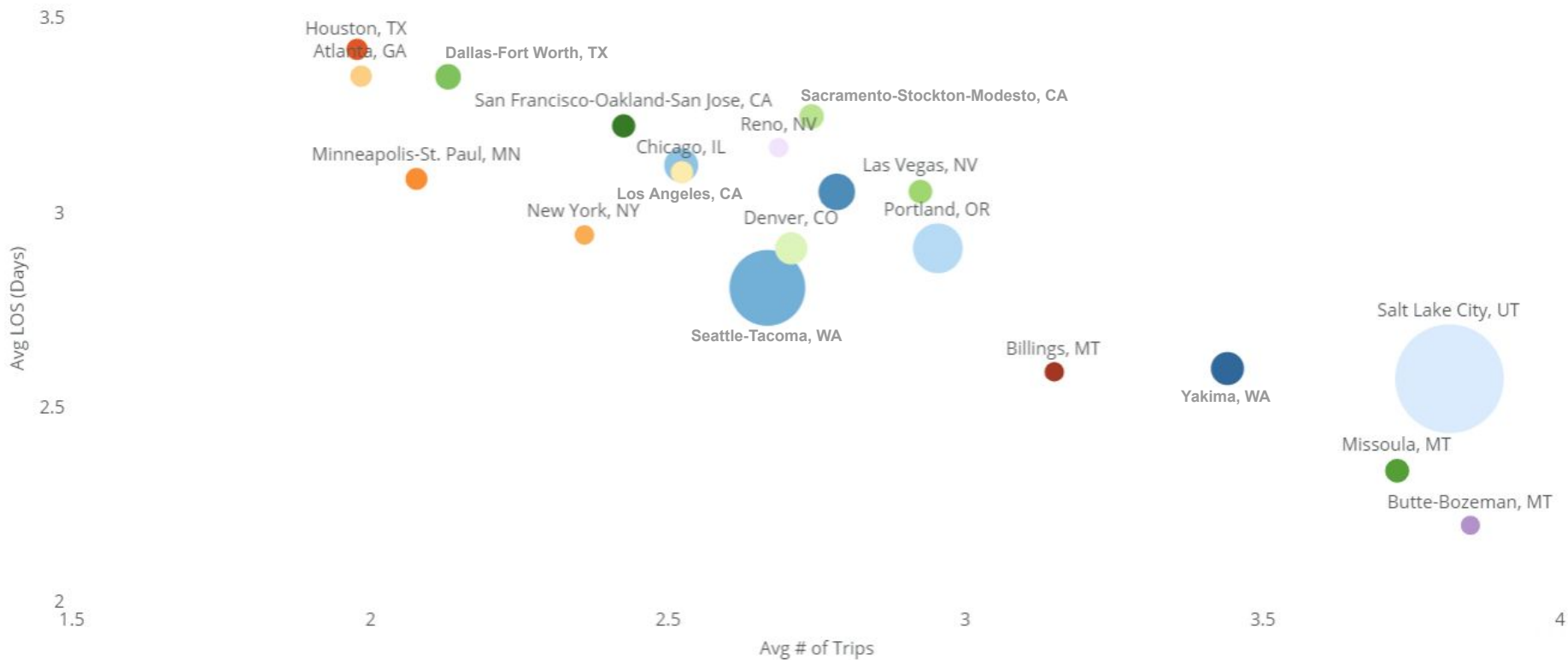
WINTER VISITATION

●	Salt Lake City, UT	48.6K	16.0%
●	Spokane, WA	26.33K	8.7%
●	Seattle-Tacoma, WA	21.28K	7.0%
●	Portland, OR	12.87K	4.2%
●	Phoenix, AZ ⬆	9.12K	3.0%
●	Yakima-Pasco-Richland-Kennewick, WA ⬇	8.68K	2.9%
●	Denver, CO ⬆	7.4K	2.4%
●	Los Angeles, CA ⬇	7.14K	2.3%
●	Missoula, MT ⬇	5.85K	1.9%
●	Dallas-Ft. Worth, TX ⬆	5.72K	1.9%
●	Atlanta, GA ⬆	4.76K	1.6%
●	Las Vegas, NV ⬆	4.28K	1.4%
●	Chicago, IL ⬆	4.12K	1.4%
●	Sacramento-Stockton-Modesto, CA ⬇	3.95K	1.3%
●	Minneapolis-St. Paul, MN ⬆	3.87K	1.3%
●	Other	130.22K	42.8%

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

MADDEN
Voyage

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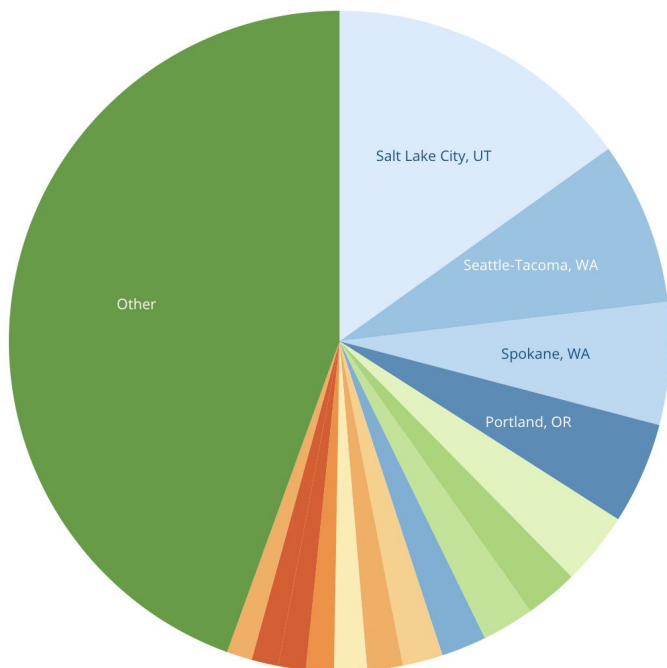
Market		Visitation	Share
Salt Lake City, UT		56.65K	15.1%
Seattle-Tacoma, WA		29.93K	8.0%
Spokane, WA		22.46K	6.0%
Portland, OR		18.65K	5.0%
Phoenix, AZ	↑	13.38K	3.6%
Yakima-Pasco-Richland-Kennewick, WA	↑	9.67K	2.6%
Denver, CO	↑	9.57K	2.6%
Los Angeles, CA	↓	8.27K	2.2%
Dallas-Ft. Worth, TX	↑	7.38K	2.0%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

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

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)
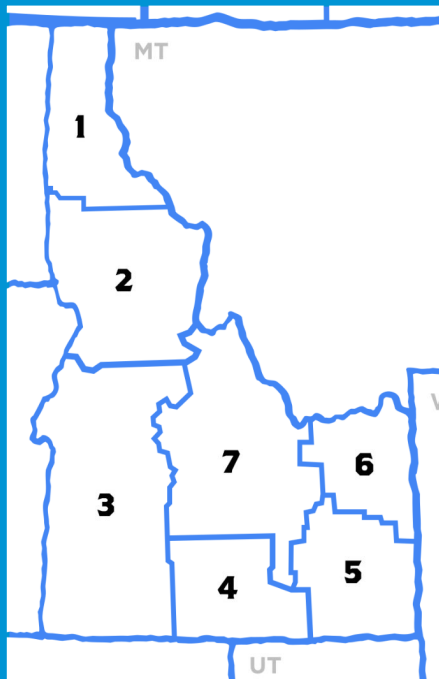Summer: 3.5 LOS (WA*,OR, MT, CA,TX)

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

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

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

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

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

INCREASING
LENGTH OF STAY

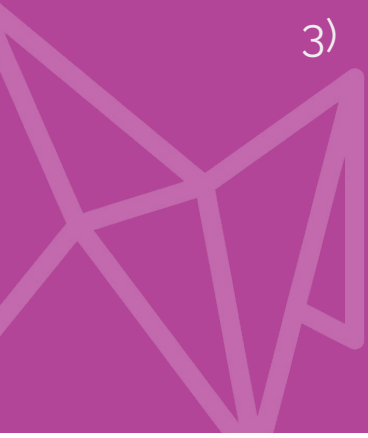| Metro Updated	Avg LOS (days)	Avg # of trips	Unique Devices
Tampa-St. Petersburg (Sarasota), FL	3.81	1.74	5,776
Houston, TX	3.65	1.77	9,333
Washington, DC (Hagerstown, MD)	3.64	1.80	5,270
Orlando-Daytona Beach-Melbourne, FL	3.55	1.84	6,327
Dallas-Ft. Worth, TX	3.52	1.90	14,549
New York, NY	3.50	1.79	9,049
Atlanta, GA	3.47	1.74	10,696
Kansas City, MO	3.42	1.87	5,249
Chicago, IL	3.42	2.13	10,112
Minneapolis-St. Paul, MN	3.30	1.88	9,900
Reno, NV	3.29	2.40	6,717
San Francisco-Oakland-San Jose, CA	3.27	2.20	8,459
Sacramento-Stockton-Modesto, CA	3.27	2.59	9,369
Phoenix, AZ	3.23	2.47	24,810
Los Angeles, CA	3.20	2.41	16,988
Las Vegas, NV	3.15	2.56	11,650
Portland, OR	3.14	2.81	33,437
Denver, CO	3.08	2.49	18,742
Seattle-Tacoma, WA	3.04	2.50	54,262
Albuquerque-Santa Fe, NM	3.03	2.47	5,459

So, what next?

TAKEAWAYS

1) Review insights for your region on the <u>Idaho Mobility Dashboard</u>

2) <u>Prioritize</u> your audiences based on LOS, emerging markets, and seasonality shifts

3) Shift to <u>travel intents</u> to expand geographic constraints