

ASSESSING *Recovery*

Leveraging the **Latest Trends** in Outdoor Recreation



July 9, 2020

U.S. TRAVEL
ASSOCIATION®

60%

of Americans view
**outdoor recreational
activities as safe**

SOURCE: DESTINATION ANALYSTS



Specific **Destination Types** Travelers Are Considering





MARGARET EVERSON

Principle Deputy Director
U.S. Fish & Wildlife Service, U.S.
Department of the Interior



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Brand Director
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Ensuring Safe Public Access Across DOI Lands During COVID-19

MARGARET EVERSON, DEPARTMENT OF THE INTERIOR

Development of Plans

- ▶ White House Guidance
- ▶ Office of Management and Budget (OMB)/Office of Personnel Management (OPM) Memorandum for Heads of Executive Departments and Agencies.
- ▶ Decisions on operations occur at the local and regional level
- ▶ Actions should generally align with State guidance

Resumption of Public-facing Operations

- ▶ Primary considerations underlying the resumption of any public-facing operations should be based on the impact and **safety to visitors, staff, volunteers, contractors, and partners**. Facility decisions should observe CDC and State health guidance, including the following:
 - ▶ social distancing and ability to manage crowds;
 - ▶ ability to meet cleaning/sanitation standards;
 - ▶ availability of necessary PPE;
 - ▶ capacity of seasonal and permanent staff; and
 - ▶ capacity of the medical resource in the local communities as determined by State recommendations.

Slow the Spread

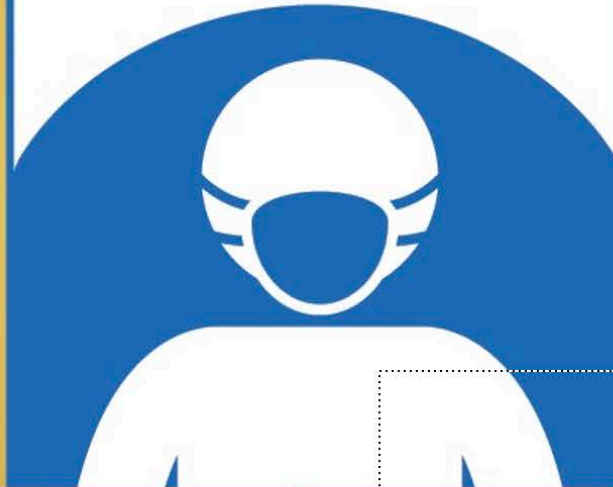
Help Prevent the Spread of COVID-19:



Clean and disinfect touched

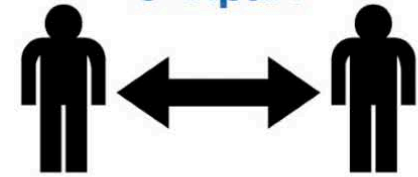
NOTICE

PLEASE WEAR A FACE COVERING IF YOU CANNOT MAINTAIN 6 FEET OF PHYSICAL DISTANCE



Please Keep Your Distance

6ft Apart



The Centers for Disease Control recommends physical distancing to prevent the spread of COVID-19. For your safety and the safety of your community, please maintain a distance of at least 6 feet from others.

Consistent Signage at Public Facilities

▶ Click to add text

How are we doing?

- ▶ Currently 96% of all DOI lands are accessible by the Public
 - ▶ 91% at NPS
 - ▶ 98% at FWS
 - ▶ 97% at BLM



JAMES SAUTER

Partner and Co-Founder
Rove Marketing



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TOURISM MARKETING RE-IMAGINED

Using mobile location data to monitor
early stages of recovery

Date: July 9, 2020

U.S. TRAVEL
ASSOCIATION

Today

- Purpose of the National Parks dashboard
- About mobile location data
- What does the dashboard track?
- Latest insights
- How it can be used?



Monitoring early stages of recovery

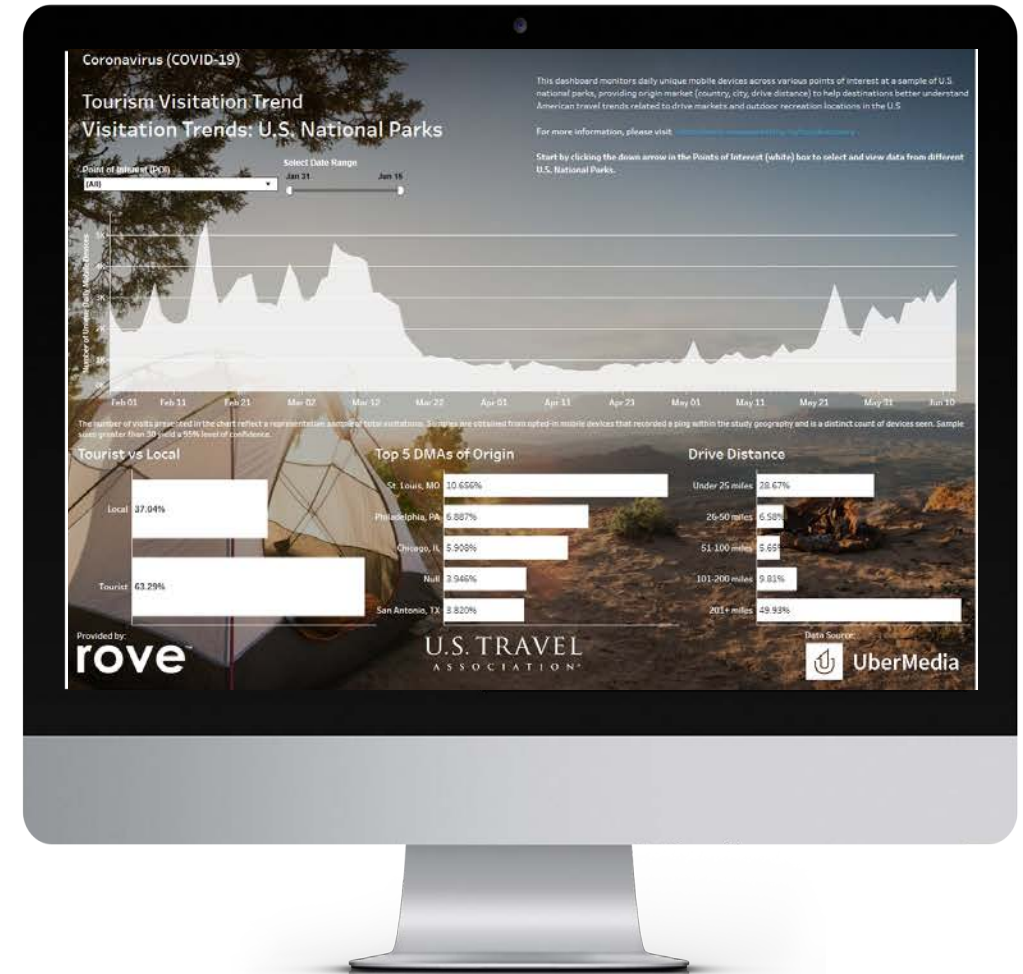
As the pandemic hit our regions, we wanted to help by developing a tool to monitor the recovery.

We could see that early recovery would come first from locals, followed by drive markets.

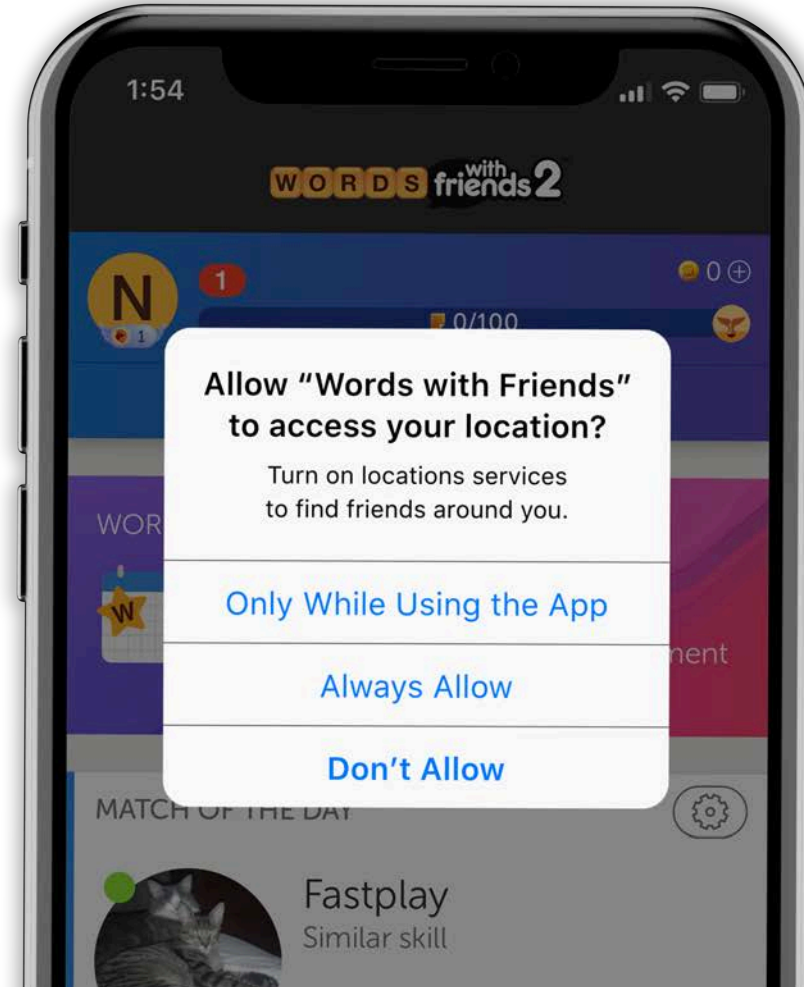
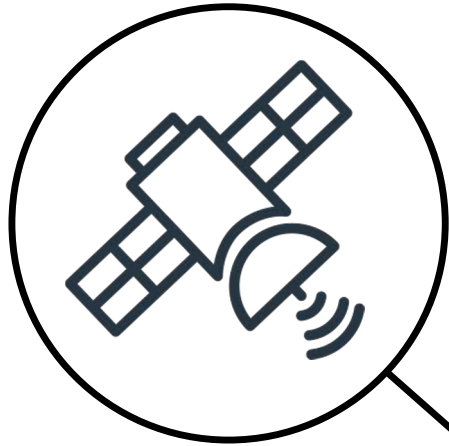
Traditional visitation data sources - hotel data, flight data, border data - were not going to be useful in the early stages of recovery.

We saw mobile location data as the best source of data to monitor the early stages of recovery.

1. Measure local, nearby visitors, drive markets.
2. Can measure very specific points of interest (i.e. parking lots, visitor information centers, bus stations, etc...)
3. Accurate for measuring drive distance



How Mobile Location Data is Gathered

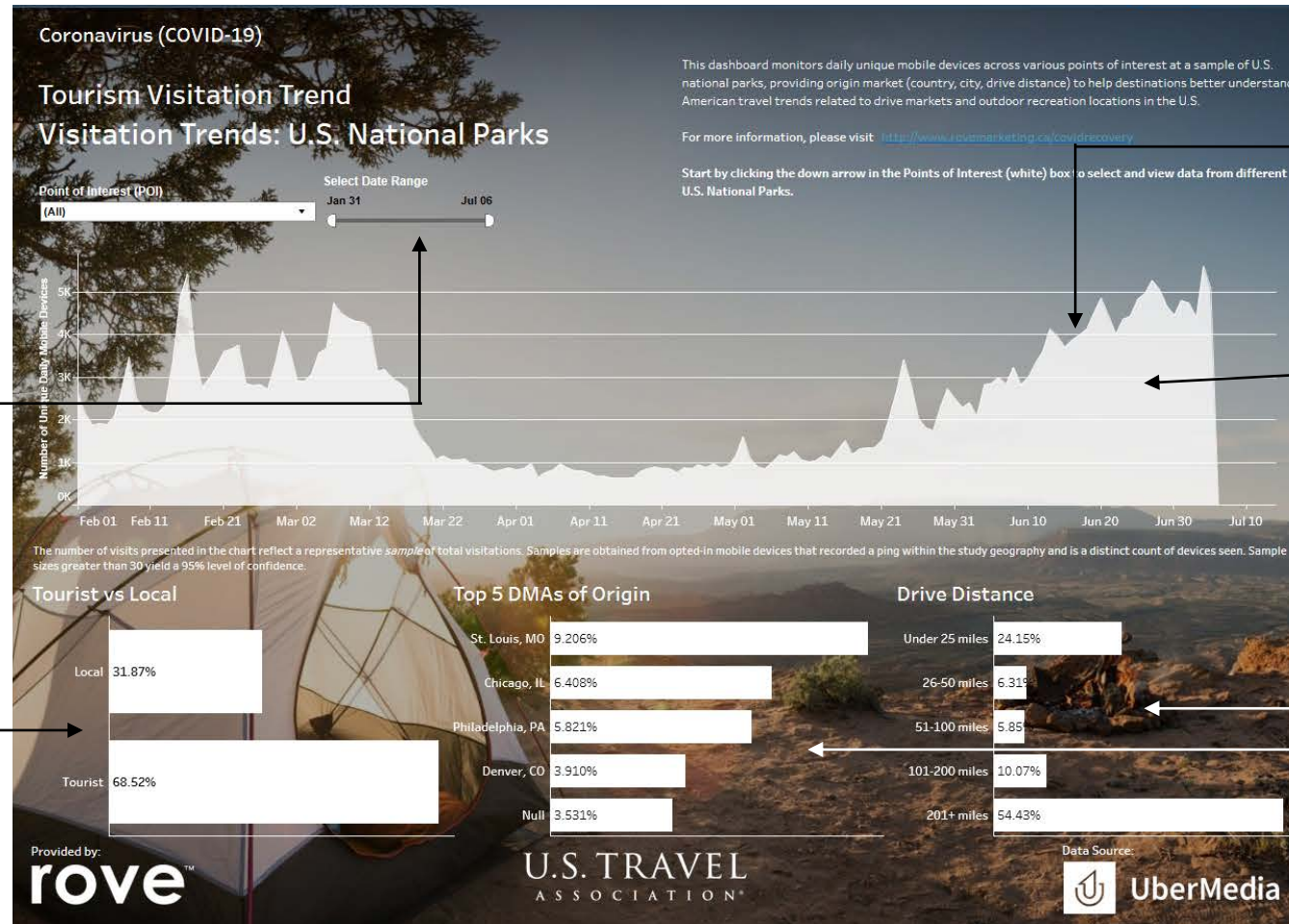


What does the dashboard track?

Where are they going in destination? →

How is the data changing over time? →

What % is local vs tourist? →



How fast is it growing? →

How sustained is the recovery? →

Where are they coming from? →

<https://www.ustravel.org/research/national-parks-dashboard>

Unique Mobile Devices...explained.

The number of visits presented in the chart reflects a representative sample of total visitations.

Samples are obtained from opted-in mobile devices that recorded a ping within the study geography and is a distinct count of devices seen.

Sample sizes greater than 30 yield a 95% level of confidence.

Tourism Visitation Trend Visitation Trends: U.S. National Parks

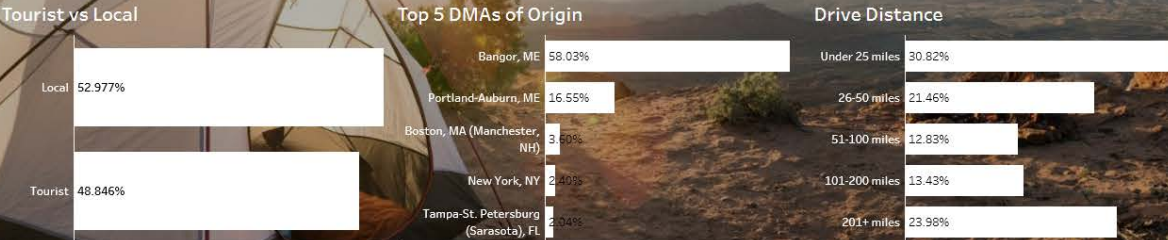
This dashboard monitors daily unique mobile devices across various points of interest at a sample of U.S. national parks, providing origin market (country, city, drive distance) to help destinations better understand American travel trends related to drive markets and outdoor recreation locations in the U.S.

For more information, please visit <http://www.ubermedia.com/covidrecovery>

Start by clicking the down arrow in the Points of Interest (white) box to select and view data from different U.S. National Parks.



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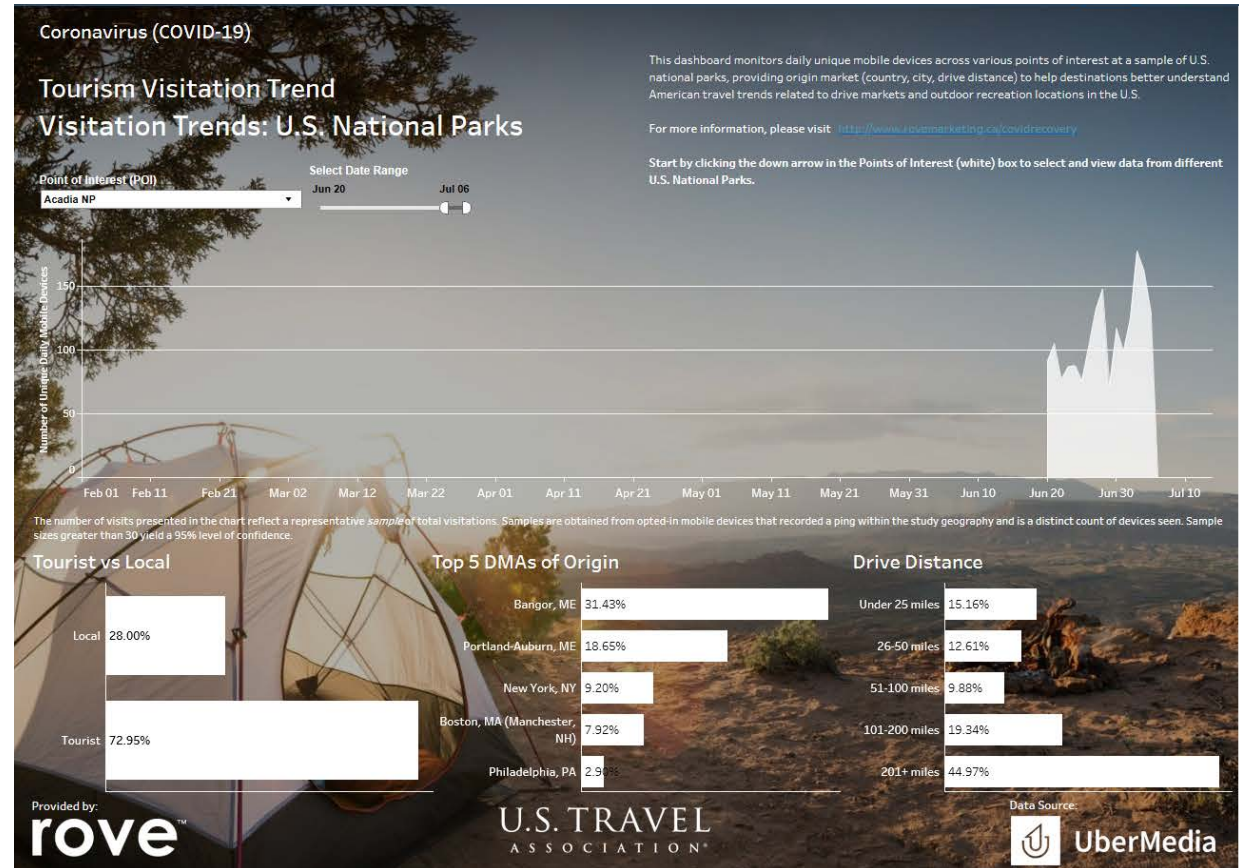


Period: May 24 – June 19 (4 weeks)
Locals vs Tourist: 50/50
Drive market: equally distributed
Unique IDs: 1422

U.S. National Park: Acadia NP

Insights:

- Shift from locals to tourist
- Primarily over 200 miles
- Visitation is growing



Period: June 20 – July 4 (last 2 weeks)
Locals vs Tourist: 30/70
Drive market: +50% > 100 miles
Unique IDs: 1792

Coronavirus (COVID-19)

Tourism Visitation Trend
Visitation Trends: U.S. National Parks

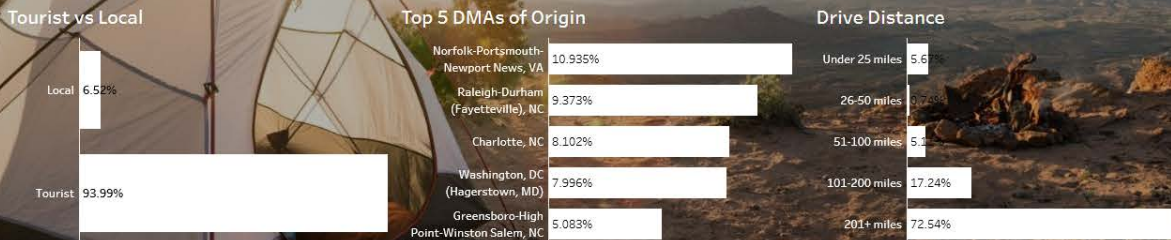
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The number of visits presented in the chart reflect a representative *sample* of total visitations. Samples are obtained from opted-in mobile devices that recorded a ping within the study geography and is a distinct count of devices seen. Sample sizes greater than 30 yield a 95% level of confidence.



Provided by: **rove**™ U.S. TRAVEL ASSOCIATION™ Data Source: **UberMedia**

Period: Since Memorial Day weekend (last 6 weeks)

Locals vs Tourist: 6% / 94%

Drive market: 72% >200 miles

Unique IDs: 4346

Period: June 20 – July 4 (last 2 weeks)

Locals vs Tourist: 6% / 94%

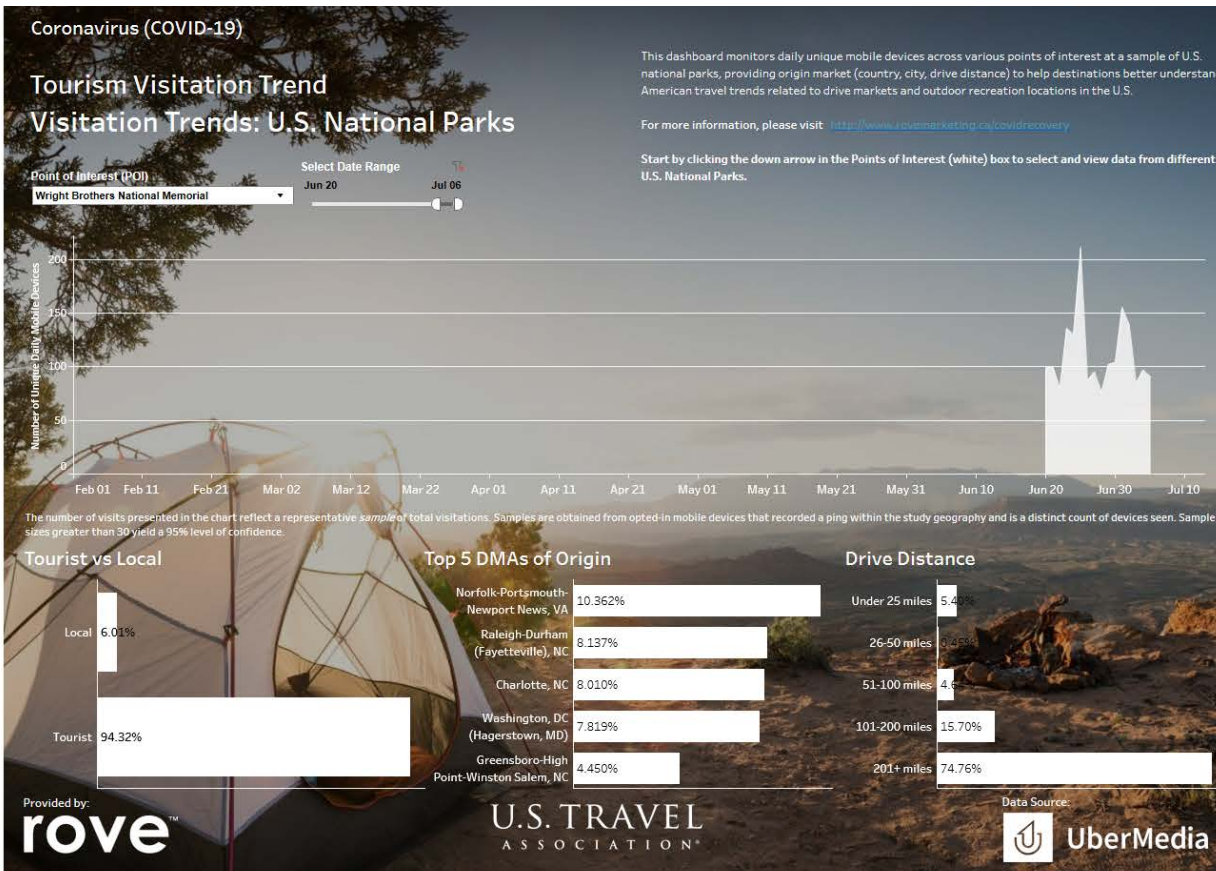
Drive market: 75% > 200 miles

Unique IDs: 1786

U.S. National Park: Wright Brothers NM

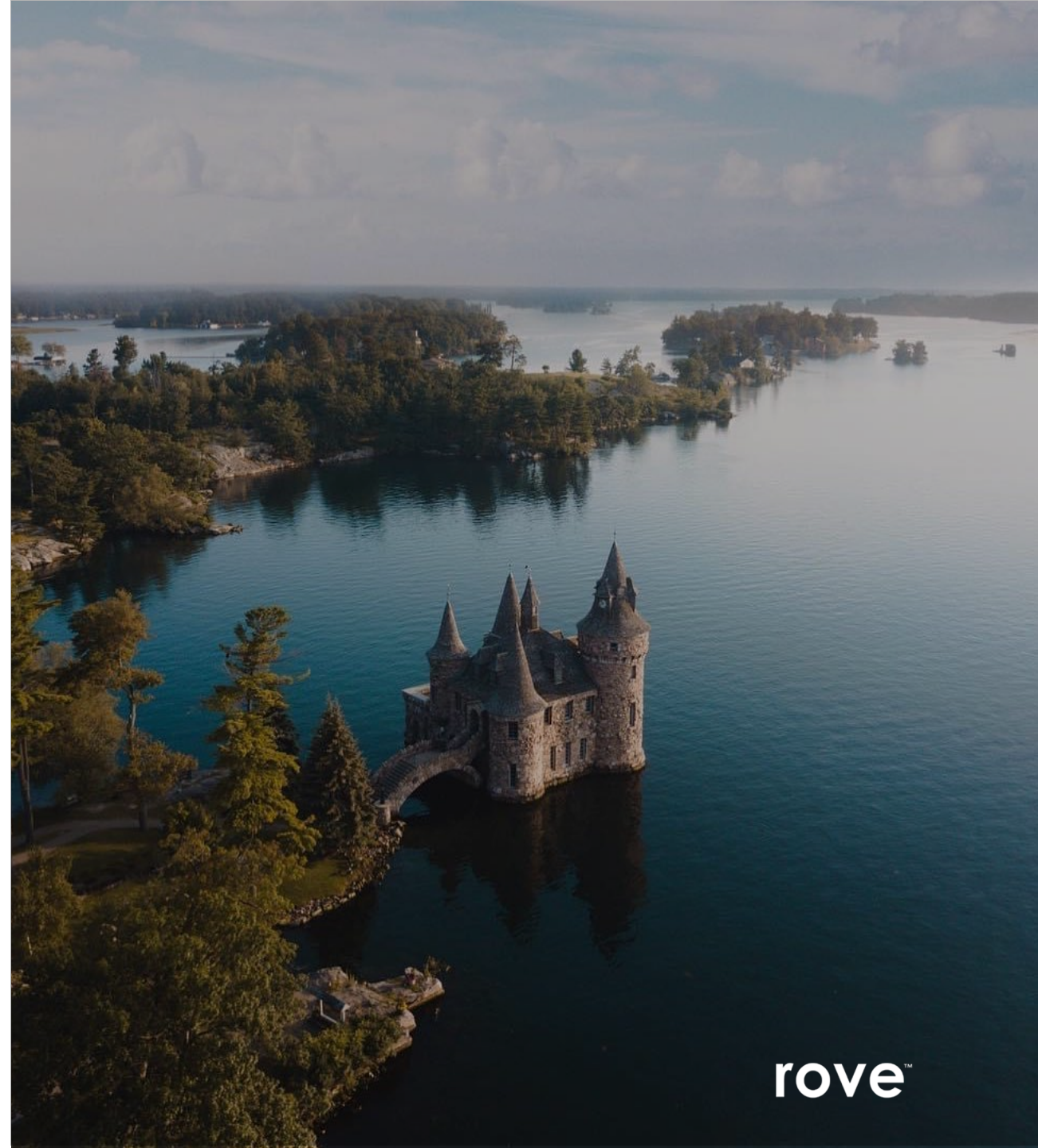
Insights:

- Active drive market + 200 miles = overnighnter
- Growth is accelerating
- Recovery is sustained



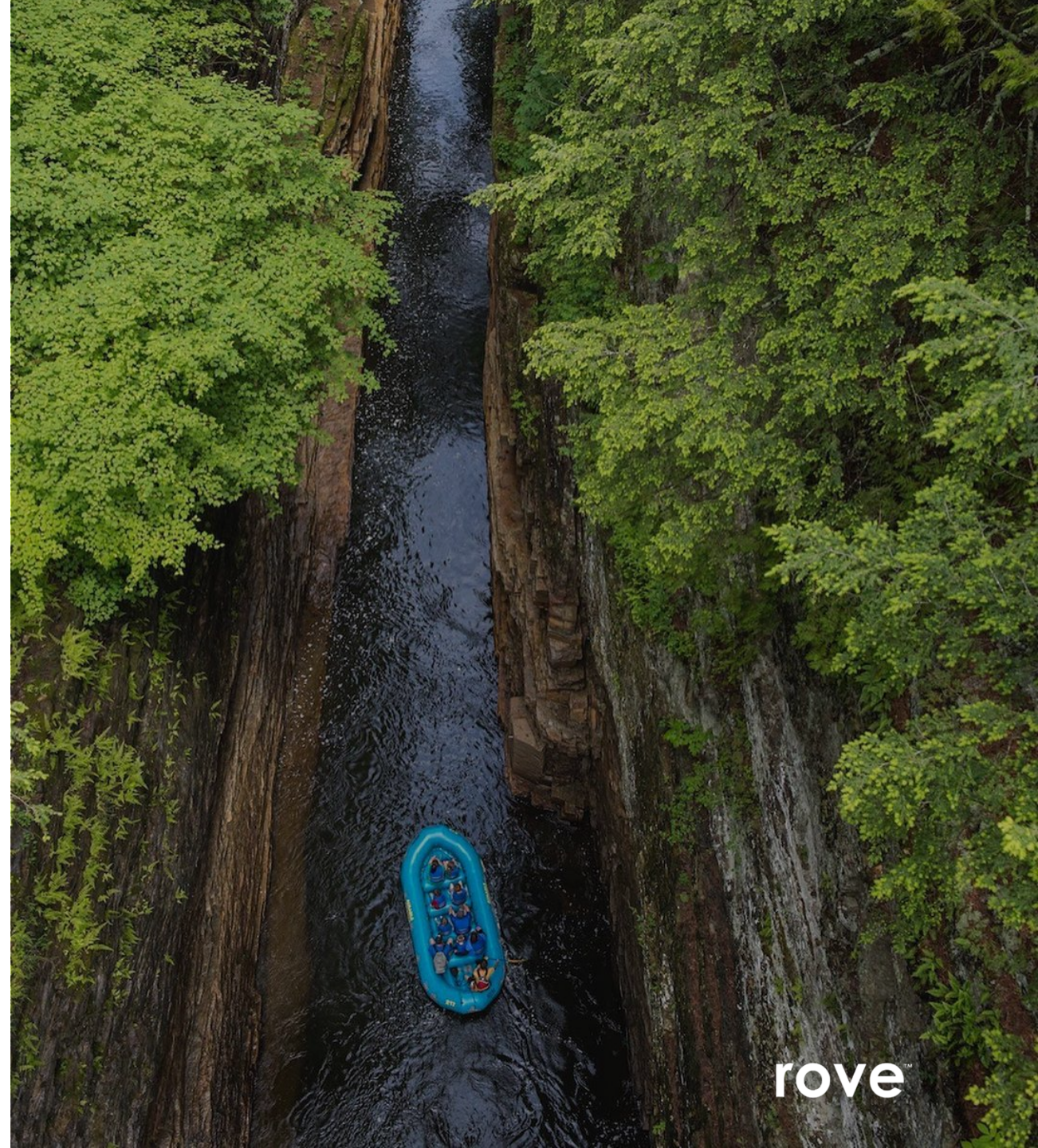
How destinations use mobile location data -

- Where are my visitors coming from?
- What is their length of stay?
- What do they do, where do they go?
- What are their demographic profiles?
- How does this change with in state vs out of state visitors?
- How does this change with daytrippers vs overnights?
- How does this change throughout the year?
- How do we compare to other destinations?



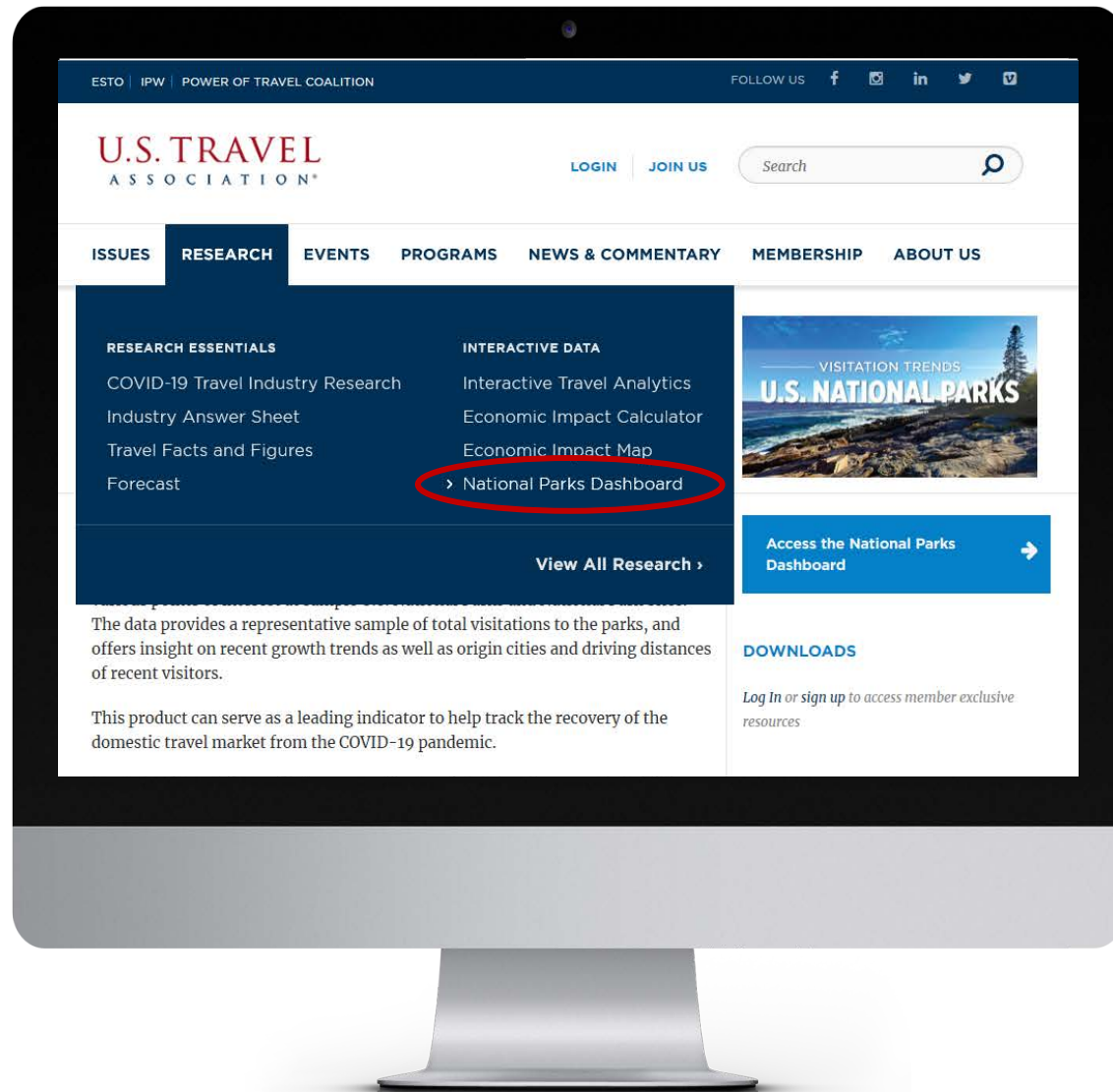
How destinations use mobile location data -

- Origin markets of visitors; from zip codes to DMAs to countries, in state and out of state
- Length of Stay of visitors; how lengths of stay change with different Visitor Segments, including Daytrippers vs Overnighters
- Top Points of Interest Visited, as well as POI Cross Visitation
- Dwell Time of visitors within Points of Interest, comparing different Visitor Segments
- Demographics of Visitors
- Heatmaps of Visitation
- How this all changes on a monthly, seasonal, and yearly basis, with data going back to 2017.



Visitation Trends for U.S. National Parks

<https://www.ustravel.org/research/national-parks-dashboard>





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TOURISM MARKETING RE-IMAGINED

Thank you!

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U.S. TRAVEL
ASSOCIATION



LINDSEY NORMENT

Brand Director

Virginia Tourism Corporation



**VIRGINIA
IS FOR
LOVERS[®]**



Traveler Sentiment Summary Report

- Compiled research from Destination Analysts, Longwoods International, Adara, Omnitrak



INSIGHT ONE:

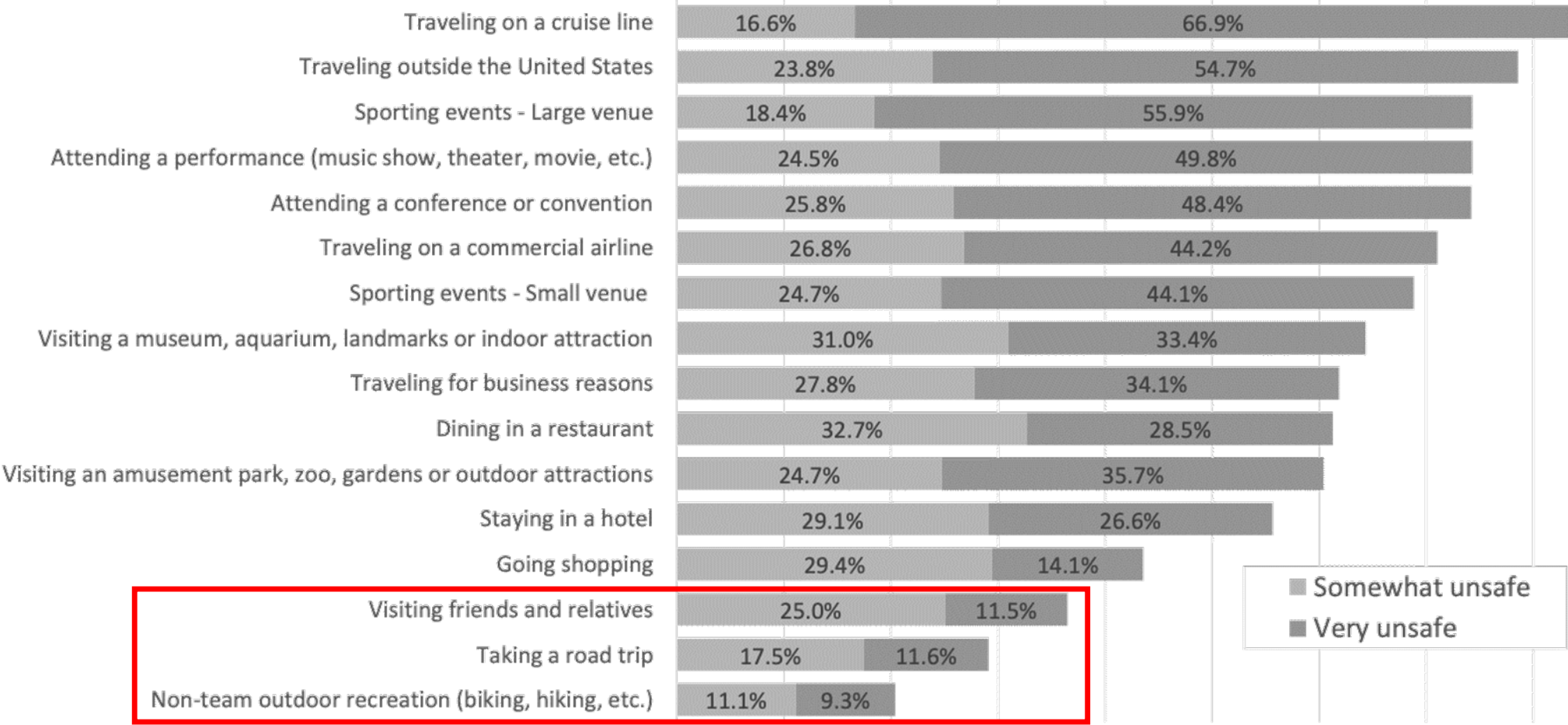
Consumers miss traveling but are currently still fearful



INSIGHT TWO:

When consumers first return to travel, many will likely begin by taking shorter road trips, avoiding the crowds

Question: At this moment, how safe would you feel doing each type of travel activity?



Aligning as closely as possible across sources, roughly **half plan car travel in the next 6 months**, and about half of those are planning shorter, regional trips



<p>63% Plan to travel by car, next 6 months</p>	<p>62% Have a trip planned, next 6 months</p>	<p>44% Plan travel by car, next 6 months</p>
<p>51% Plan < 200-mile trip</p>	<p>47% Plan < 200-mile trip</p>	<p>44% Plan 1 to 4-hour trip</p>
<p>49% Plan > 200-mile trip</p>	<p>53% Plan > 200-mile trip</p>	<p>56% Plan > 4-hour trip</p>



Goal:

Drive immediate economic impact by inspiring travel among in-state audiences



Strategy:

Position road trips as a safe and accessible re-entry into travel, highlighting additional low-risk experiences



WANDERLOVE

VIRGINIA IS FOR LOVERS



WANDERLOVE

VIRGINIA IS FOR LO♥ERS

WANDERLOVE

VIRGINIA IS FOR LOVERS[®]





WANDERLOVE

A strong desire to travel in Virginia.

WanderLove is calling – and adventure is the destination. Reconnect with what you love this summer on an epic Virginia road trip.



WANDERLOVE

The strategy for this campaign is to meet travelers where they are, physically and mentally, by promoting safe, close-to-home destinations that allow for social distancing and access to open spaces like beach trips, outdoor recreation and rural experiences.



WANDERLOVE

We will leverage Virginia's many road trip adventures and low-risk experiences:

- Outdoor Recreation
- Hidden Gems
- Small Towns
- Virginia's unique "roadside attraction" – LOVEworks



WANDERLOVE
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0:11 / 0:30

Find What You Love in Virginia

30,097 views • Jun 29, 2020

17 1 SHARE SAVE

Virginia is for Lovers
5.45K subscribers

SUBSCRIBE

WANDERLOVE

Video and content series to highlight various road trips around Virginia and the many stops along the way

The videos will be promoted through social media to grab attention and inspire travelers to learn more



Wanderlust is defined as a strong desire to travel, but here in Virginia, we call that feeling **WanderLOVE**. And while travel doesn't look quite the same this year, you can still explore Virginia's endless beauty with an epic road trip! Whether you take an eastern route to Virginia's pristine beaches or traverse the scenic curves of storied mountains, a road trip through the Commonwealth is a magical way to vacation safely this summer.

Weekend Getaways for Outdoor Adventure



WANDERLOVE

Our blog and website will be equipped with detailed itineraries so travelers can easily plan their Virginia getaway

Virginia Tourism Corporation

Information for Virginia's Travel Industry

[about](#) [marketing](#) [grants](#) [partner](#)

You are here: [Home](#) / [COVID-19: Industry Response Toolkit](#) / [Brand Response/Marketing](#) / Campaign: WanderLove

Campaign: WanderLove



COVID-19 BRAND RECOVERY

The coronavirus has had a devastating impact on our tourism and hospitality industries. But as restrictions are lifted in Virginia and across the nation, research indicates travelers will be gearing

WANDERLOVE

To amplify our message and to provide recovery relief to our DMO partners, VTC created a WanderLove grant, which will provide 50 grants in the amount of up to \$10,000 each.

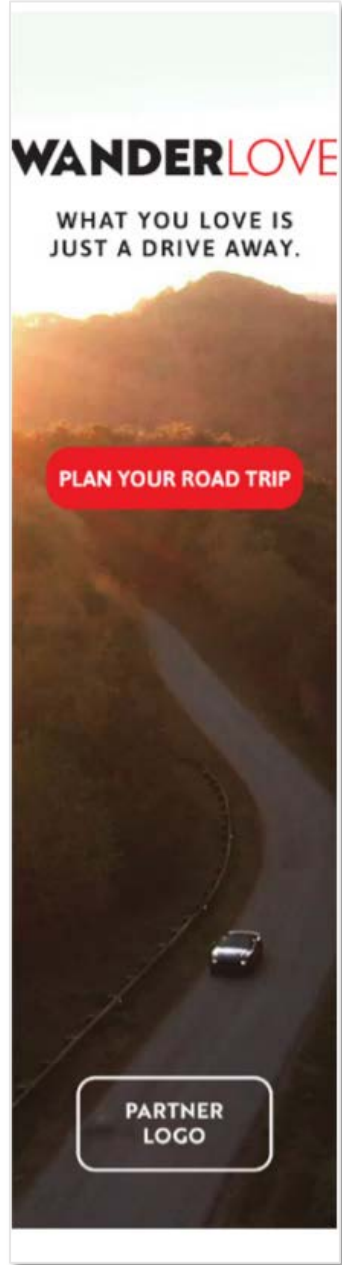
Each recipient will be equipped with creative templates and resources to highlight their own destination



Subtitle Variations

WANDERLOVE

HOW TO ROAD TRIP IN WAYNESBORO



Instagram Carousel Post Concept

Branded Intro:
Partner uses own "travel" image



Branded Outro:
Graphic does not change.



PARTNER
LOGO

Q & A

