Maryland
OFFICE OF TOURISM

# Spring/Summer 2019
## Paid Media Recommendation

2.21.19

marriner marketing
let clarity define you.

SPURRIER GROUP

# Overview

- Spring/Summer 2018 media campaign provided insights which we will draw on for the 2019 campaign
    - Consider ROI of travel platforms when allocating dollars but look toward Adara IMPACT to provide a more direct comparison
    - Evaluate emerging vendor options (Conversant) and growing tactics (CTV) to determine best use
    - Separate awareness stage from planning stage to flight tactics at the most relevant time
- Maintain the market set in order to continue to build equity
    - Utilize performance data to make budget shifts
- Include additional demographic target within current strategy that can be tested
- Focus strategy on primary KPI goals throughout
- Focus on consumer journey steps that will make the greatest impact on success

# Performance Media Process


Each step within the media process builds on and interacts with the others so that a common strategic playbook is followed with every action and the final results are guided and optimized to goal.

# The Audience

# WHO ARE WE TALKING TO?

THE AUDIENCE

Clearly define so that we can build on and refer to throughout the process.

# Target Audience

**Simmons filters:**

- HHI: range of **$75K-**$150K to include largest overnight segment
- Age: focus on the 25-54 range due to high overnight visits, higher income and higher activity participation – split into 3 segments to account for variances in media habits, lifestyle and attitudes
- Children: NOT included as a filter so as not to limit communication to over 50% of the desired age/income target
- **Added 55-74 age group** (note: Simmons cannot segment 55-72)

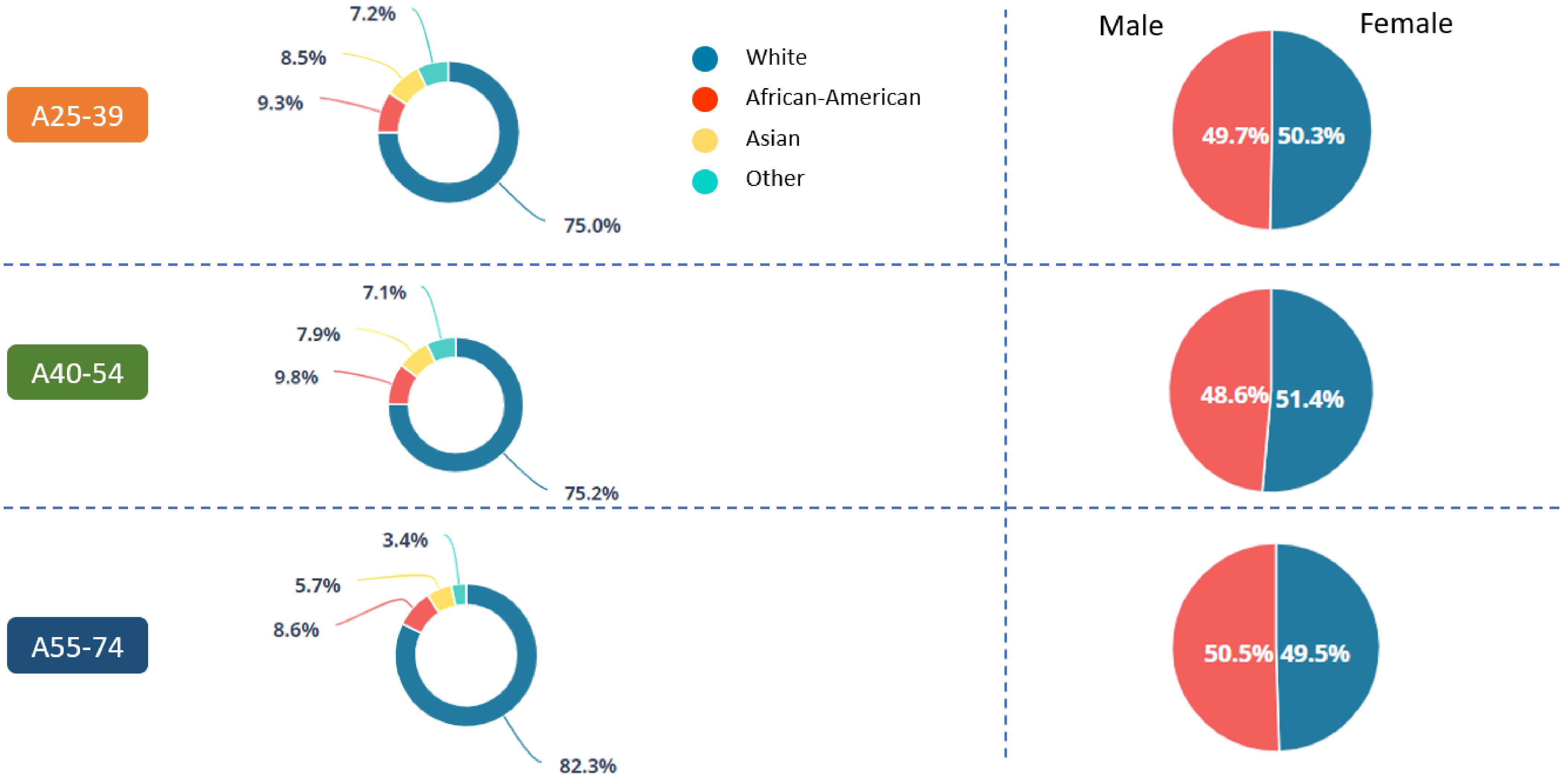
| | | | | |
|---|---|---|---|---|
| **#1** | HHI: $75K-$150K | Age: 25-39 | Sample: 1,471 | Pop: 9.18% |
| **#2** | HHI: $75K-$150K | Age: 40-54 | Sample: 1,777 | Pop: 8.19% |
| **#3** | HHI: $75K-$150K | Age: 55-74 | Sample: 2,581 | Pop: 8.72% |

Source: Simmons Summer 2018 NHCS Adult Study12-month and Summer 2018 Simmons Connect

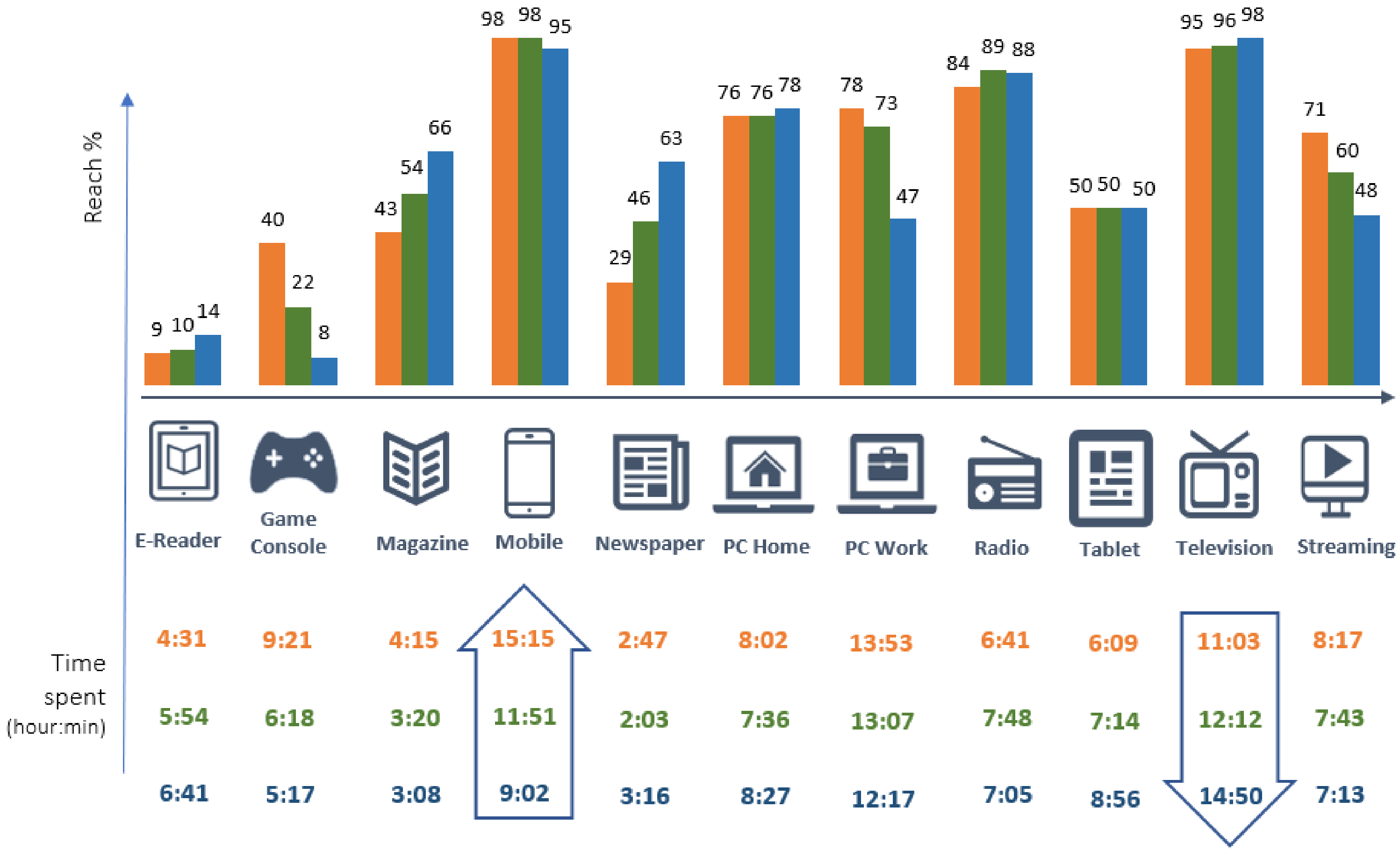
# Demographic Profile (general statistics)

| | A25-39 | A40-54 | A55-74 |
|---|---|---|---|
| Median Household Income | $108,492 | $109,868 | $106,490 |
| Median Age | 32.1 | 47.2 | 62.6 |
| Employed (Full or Part-Time) | 88% | 88% | 60% |
| Married | 63% | 75% | 75% |
| Children in Household | 54% | 46% | 11% |
| Homeowners | 63% | 81% | 85% |

# Demographic Profile (Race/Gender)



# Reach/Time Spent (7 day period)



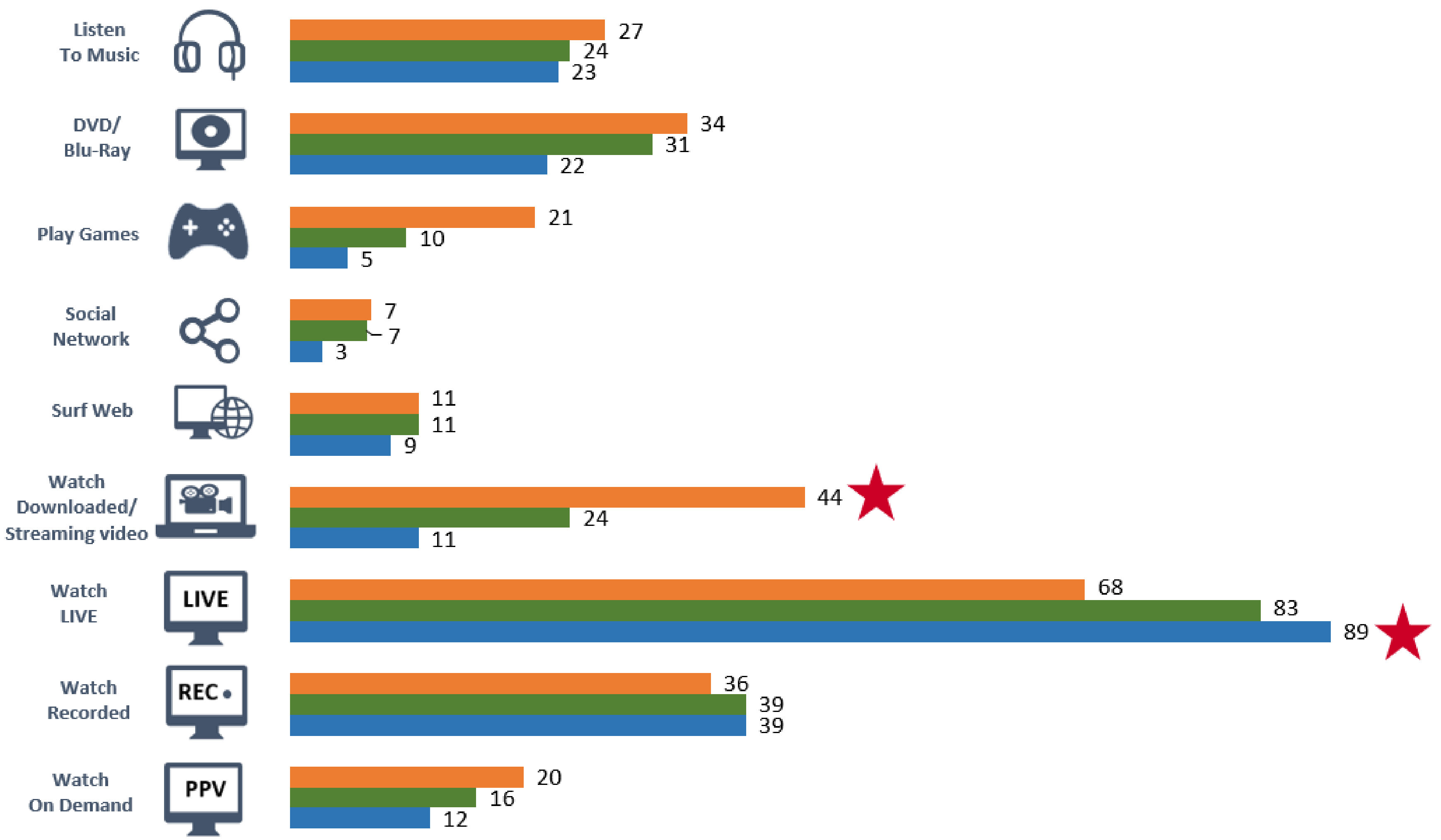

A25-39

Similar reach by mobile phone but younger demo has a much higher time spent.
Reach and time spent with PC at Work is indicative of career focus at this life stage.

A40-54 A55-74

TV viewing increases with an older audience and becomes more efficient on delivery.
Streaming media, however, is currently used slightly less but is a growing category.

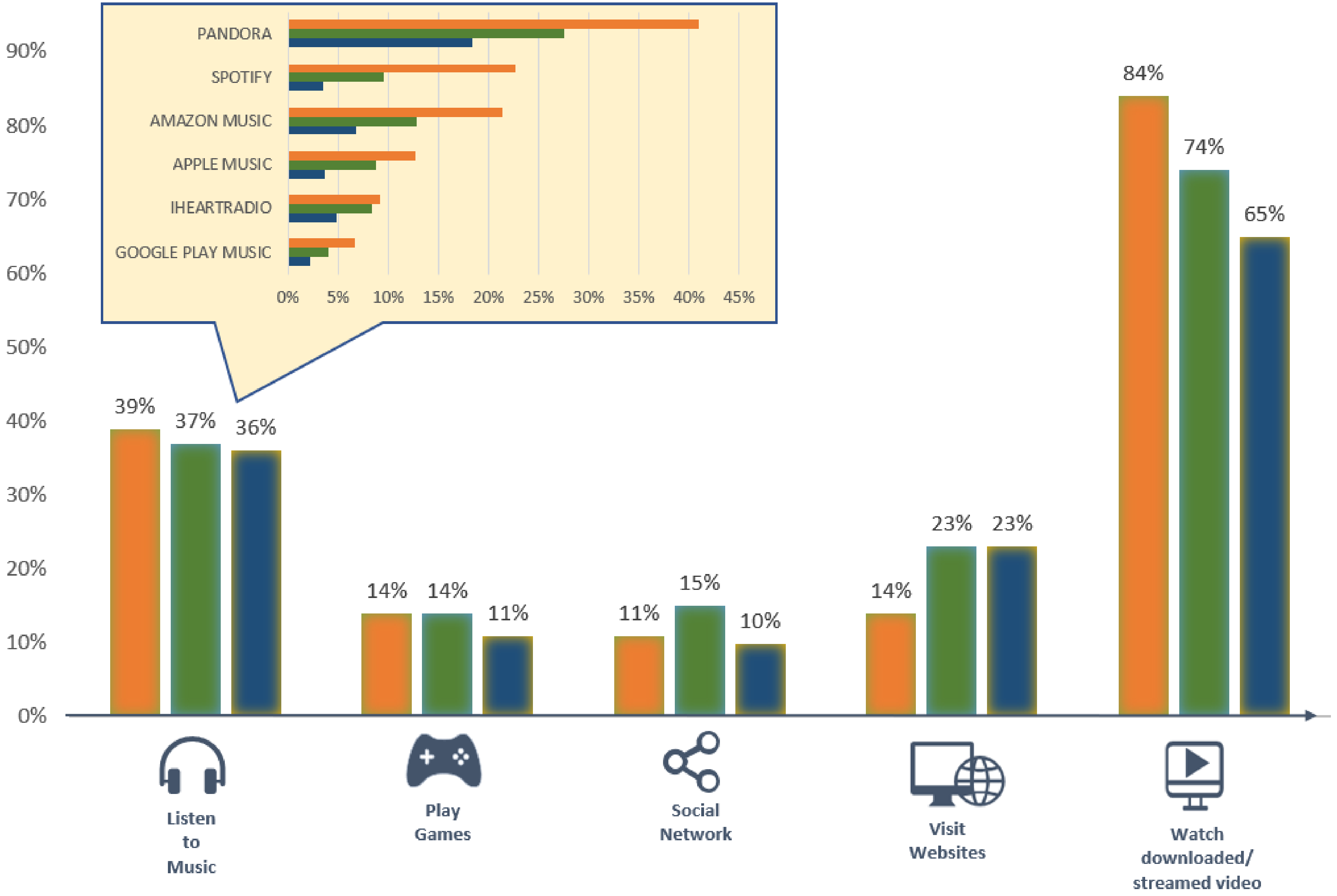
# Television Activity




A25-39 A40-54 A55-74

LIVE TV viewing is prominent with both audiences, but slightly more so with the older segment.
Conversely, streaming video has achieved a much higher reach against the younger segment.

# Streaming Media Activity




Among streaming media activity, watching **video** is the most popular.
When listening to streaming music, Pandora is the largest provider by far for both audience segments.

Additional research slides in Appendix

# Segment Profiles

## 25-39

**Care About** Career, home, family – aspiration and concerned about appearance.

**Video Viewers** Watch live TV but access streaming media (mainly video) through multiple devices.

**Digital Dependents** Can't live without Internet or cell phones. Access point for everything from email to video streaming.

**Heavy Social Media Users** 87% are social media users – accessing by mobile 3+x/day.

**Confident Spenders** Limited financial worries despite demands of this age range.

## 40-54

**Care About** Family – feel established in career and not worried about appearance.

**TV Viewers** Access streaming video and Connected TV but are still viewers of live TV.

**Digital Operatives** Internet and mobile phones are used functionally, not as a lifestyle.

**Moderate Social Media Users** 74% are social media users – access is less engaged.

**Fiscally Fit** Confident and optimistic. Able to face challenges.

## 55-74

**Care About** Spending time with family and staying informed.

**TV Viewers** Primarily Live TV viewers.

**Digital Apprentices** Take advantage of gadgets and internet for basic needs, but have room to expand.

**Moderate/Low Social Media Users** 62% are social media users – access is less frequent and engaged.

**Financial Nesters** Trying to maintain their current status.

# The Strategy

# WHAT DO WE WANT THEM TO KNOW/DO?

THE STRATEGY

The campaign call-to-action (CTA) needs a clear response metric. We establish KPIs based on the goals of the campaign and exactly what we expect the target audience to do.

# Objectives and KPI

Primary

**INCREASE TOURISM SALES TAX REVENUE VIA OVERNIGHT HOTEL STAYS**

KPI:

- Growth of tourism tax codes 111 (Hotels, Motels selling food – w/ BWL) and 901 (Hotels, Motels, Apartments, Cottages)
- Hotel bookings as measured by Adara IMPACT

Secondary

**IMPROVE WEBSITE ENGAGEMENT**

KPI:

- Onsite activity and key actions (e.g. brochure downloads, *Places to Stay* page, session duration/pages viewed)
- Traffic to landing page(s) from paid advertising

# Buying Strategy

Speak to travel intenders throughout planning process to inspire, engage and convert

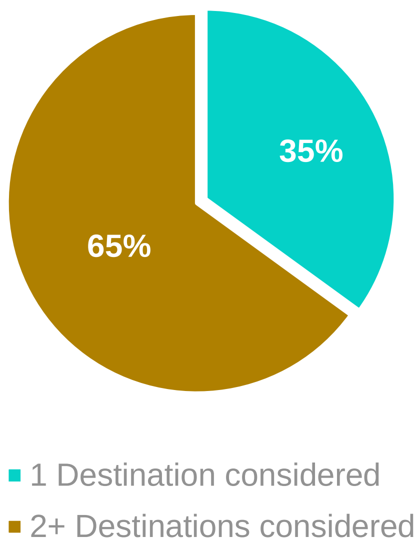
Utilize a tiered market system to guide tactics based on criteria of efficiency and effectiveness

Focus on established KPI and consumer path to optimize and track response

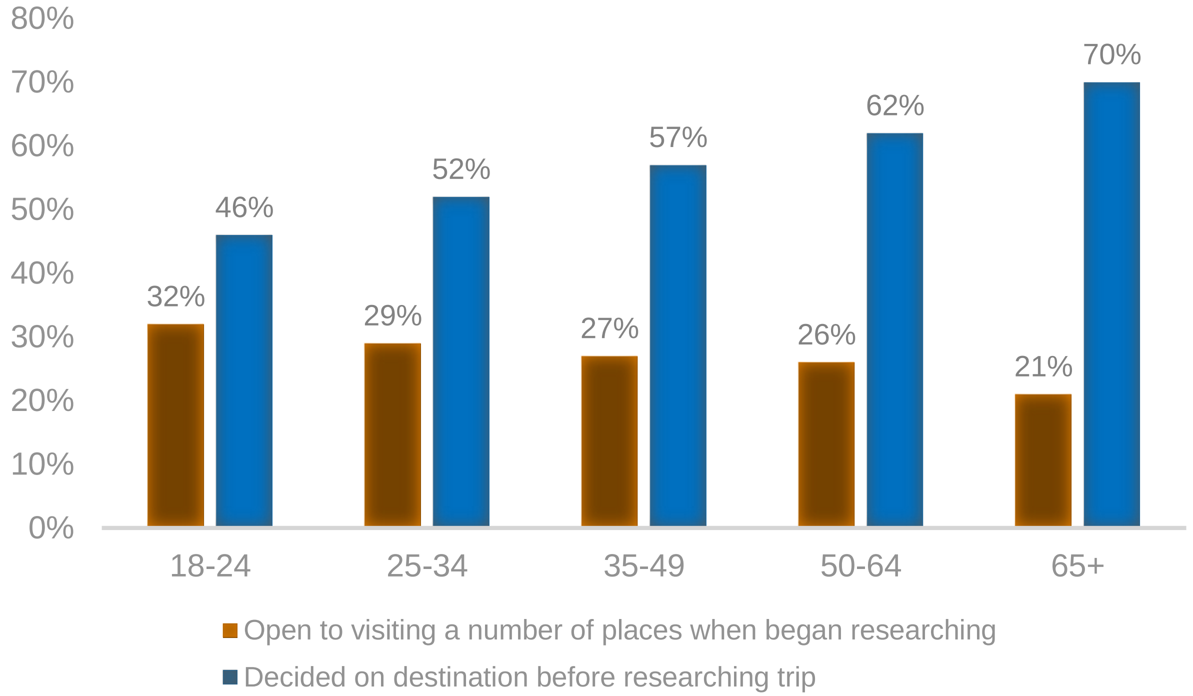
Set up Adara pixels to compare ROI across tactics and vendors to better optimize future campaigns

# Consumer Journey

## Number of Destinations Considered




## Destination consideration by Age



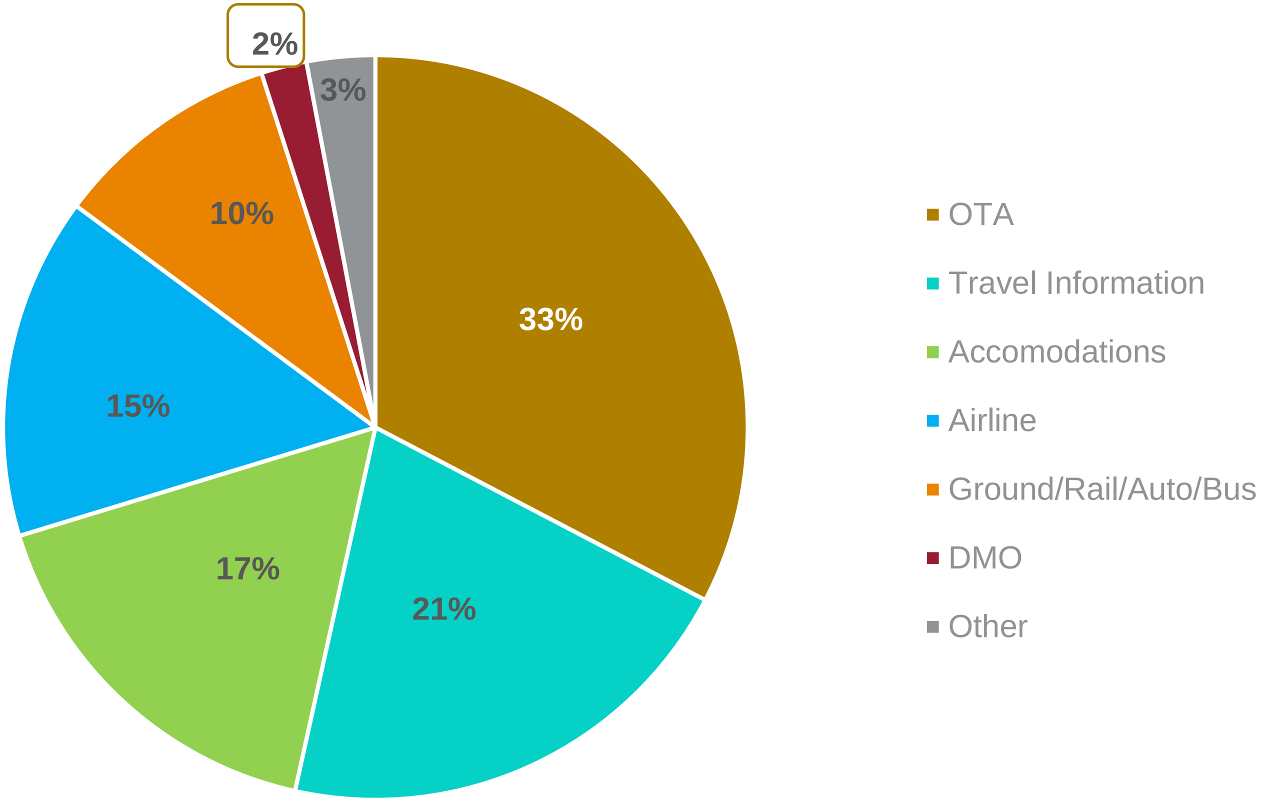

Need to impress the audience prior to research stage – especially the older demos.

Data source: comScore Survey, DESTINATIONS. PRIOR TO DECIDING ON YOUR FINAL DESTINATION, HOW MANY OTHER DESTINATIONS DID YOU CONSIDER VISITING? Among Total U.S. Online Travel Bookers (n=805)

Data source: Trip Advisor survey, Q12. Which of following best describes you?

# Consumer Journey

Total Visits Share Throughout 45 Day Path to Booking

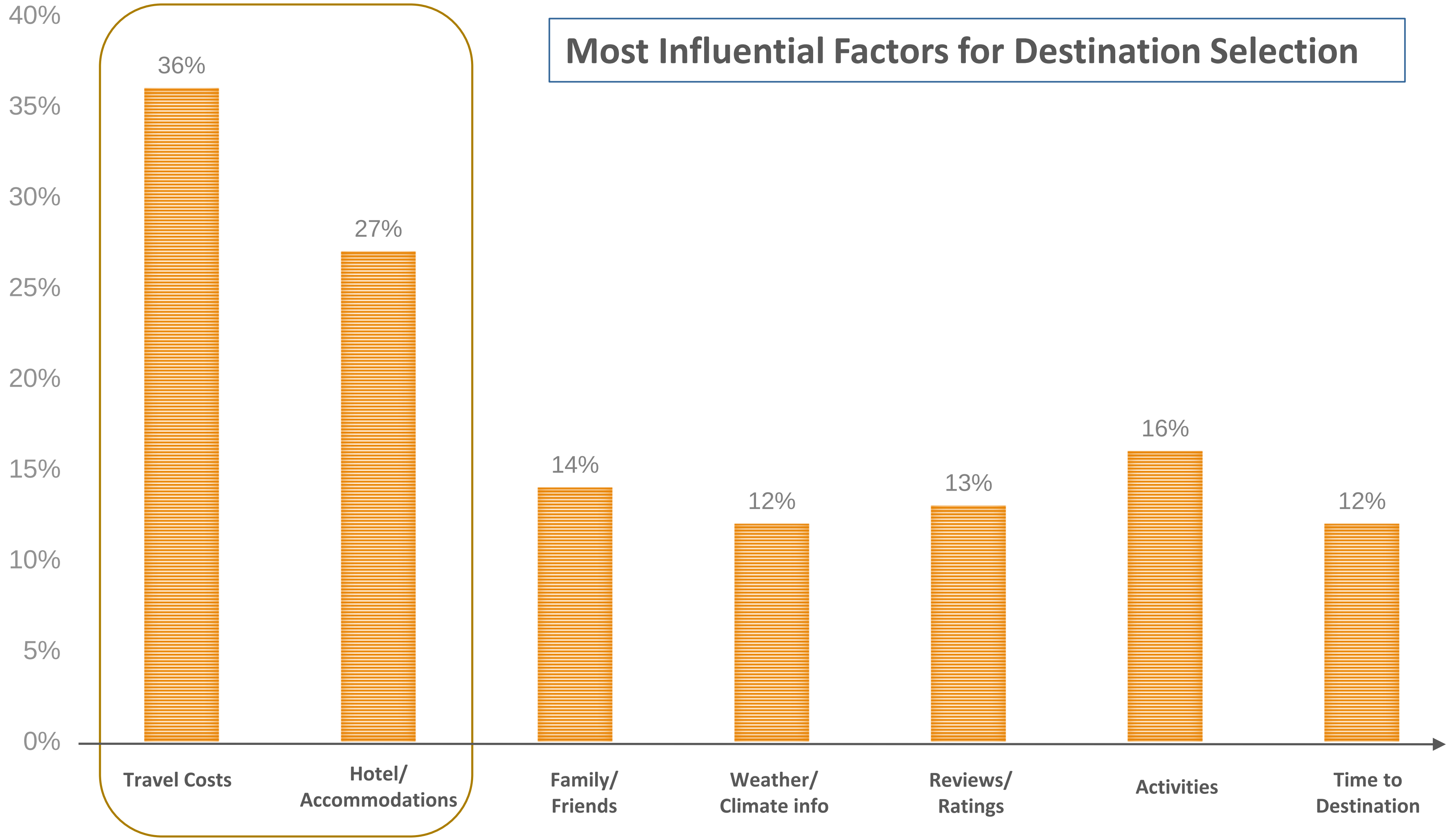



Travel consumers make 140 travel site visits on average prior to booking.

Use of DMO site is very limited at this stage – likely more utilized AFTER booking occurs.

Data source: comScore UK, US, CA Desktop Panels, Custom Path to Booking Visitation Analysis, Share of Total Visits, Online Travel Booker Segment: Dec '15-Feb '16

# Consumer Journey




The research phase is heavily focused on cost.

Data source: comScore 2016. WHAT INFORMATION WAS MOST CRITICAL IN HELPING YOU DECIDE ON YOUR DESTINATION? Among Total U.S. Online Travel Bookers (n=805)

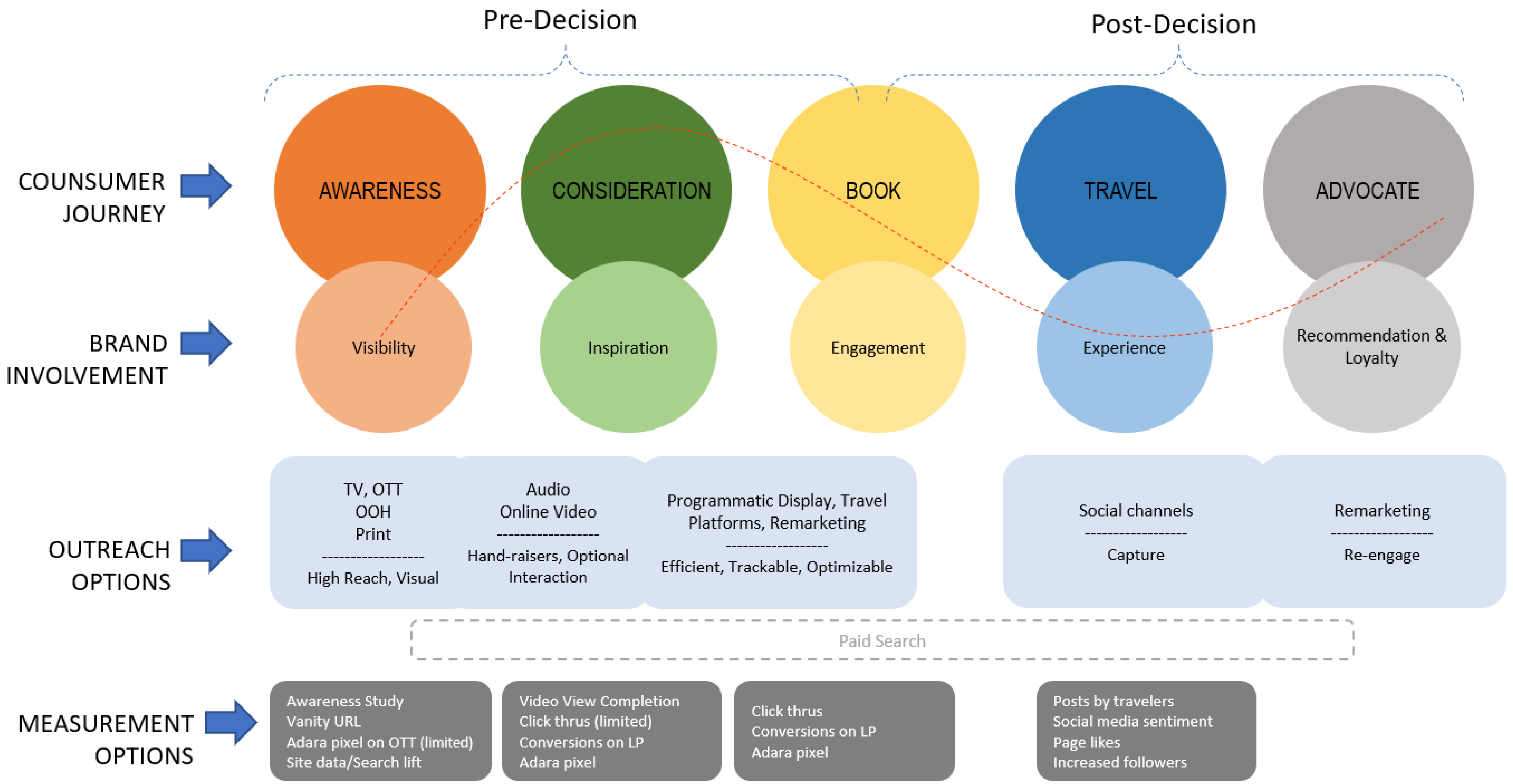
# Consumer Journey

**Highlights:**

- Online searching/research starts an average of 2-4 weeks before trip (Sojern SS18)
- Consideration starts 3-6 months or more prior (MMS 2017)
- 35% of travelers start the research/planning stage with one destination option in mind – we need to impress them prior to this
- The traveler visits many sites prior to booking – and typically NOT the DMO site. Decision is likely already made once DMO site is consulted
- Paid media will have the most effect in the Awareness and Consideration phase for a state OTD. Once a state enters the consideration set, the research shifts to specific accommodations and activities

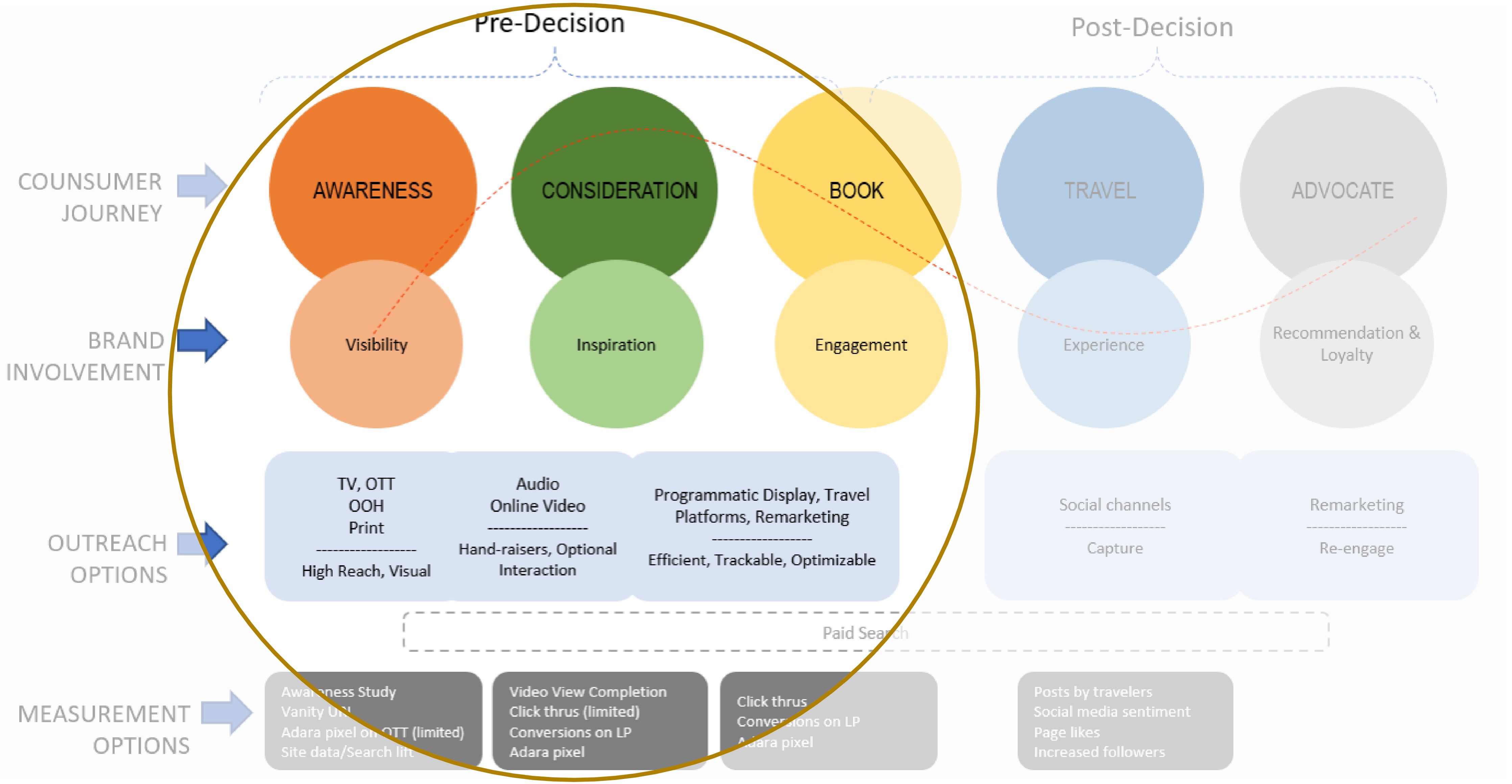
# Consumer Journey

Process is not linear as consumers research and share ideas and information throughout the journey.



# Consumer Journey

Paid Media will focus on the 'pre-decision' period.



# Market Tiers

## Considerations for Budget Allocations

**Performance**
Begin with same consideration set as in 2018 campaign. Reevaluate based on available performance data to make adjustments.

**Proximity**
Following the north to south travel patterns, driving distance from DMA to Maryland. Consider Southwest airlines flight options.

**Cost**
Look at the efficiency of the market in comparison to other origin markets. Can we purchase the benchmark or higher TRPS, weeks, needed to be effective?

**Coverage Need**
What exposure to advertising does market currently receive? How much awareness exists in the market?

# Market Tiers

## Market Consideration List

- Baltimore
- Washington D.C.
- Philadelphia
- Harrisburg
- Pittsburgh
- New York
- Cincinnati
- Columbus
- Cleveland

# Market Tiers

| | PITTSBURGH | HARRISBURG | NEW YORK | BALTIMORE | PHILADELPHIA | D.C. | CLEVELAND | COLUMBUS | CINCINNATI |
|---|---|---|---|---|---|---|---|---|---|
| Performance | | | | | | | | Did not perform as well as Cleveland in SS18 | |
| Proximity | | | | | | | Farthest drive but direct flight to BWI | Full day drive, bigger commitment | |
| Cost | | | Very high TV cost | | High TV cost | High TV cost | | | |
| Coverage Need | | | | Receive media coverage from Ocean City | | | | | |

# Market Tiers

Maintain same market tier structure with shifts to accommodate performance and efficiencies.

| TIER 1 | | TIER 1-A | TIER 2 | | | TIER 3 | | |
|---|---|---|---|---|---|---|---|---|
| PITTSBURGH | HARRISBURG | NEW YORK | BALTIMORE | PHILADELPHIA | D.C. | COLUMBUS | CLEVELAND | CINCINNATI |
| Efficienct results - low cost for high performance | | New York performance has been strong, maintain exposure in market | Receive significant media coverage from Ocean City, less need for media expenditure.<br><br>Utilize for African American tactics due to high population %. | | | Focus on Cleveland for TV exposure to limit cost.<br>Run digital tactics in all markets. | | |

# The Media

## WHERE DO WE TELL THEM?

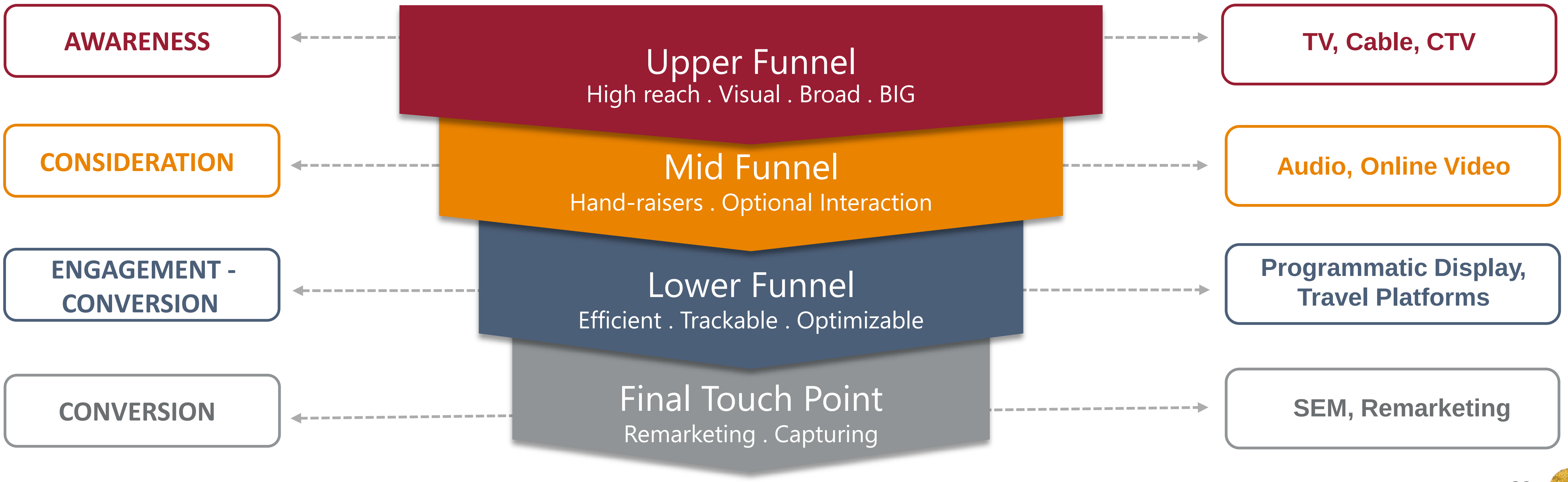
THE MEDIA

Media is the connection between the message and the consumer. It will change depending on who we are talking to, what we are asking them to do (CTA), and how we are tracking the connection (KPI).

# Full Funnel Approach

Use a full funnel approach from broad awareness to conversion tactics in order to build the Maryland OTD brand while capturing interest and tracking ROI.

Efficient targeting within broader tactics will establish the brand in a ‘big’ environment while a balance of ‘one-to-one’ tactics will provide needed ROI. The combination will provide a sustainable model.



# Channel Tactics - TV

**Television will provide the large canvas for building awareness of the OTD brand.**

**While it is a broad reach medium, it can be precisely targeted to gain efficiencies.**

Live TV viewing increases with age of demo, as does weekly time spent with this medium.
Buying to an **older demographic** increases efficiencies significantly.

| | A 25-34 | A 25-49 | A 35-49 | A 35-64 | A 55+ |
|---|---|---|---|---|---|
| HARRISBURG, PA | $ 111.63 | $ 32.29 | $ 42.90 | $ 20.44 | $ 16.08 |
| PITTSBURGH, PA | $ 89.09 | $ 27.60 | $ 35.27 | $ 12.43 | $ 10.27 |
| PHILADELPHIA, PA | $ 97.76 | $ 49.46 | $ 44.58 | $ 15.43 | $ 14.72 |
| NEW YORK, NY | $ 132.88 | $ 61.41 | $ 57.66 | $ 19.79 | $ 21.23 |
| WASHINGTON, DC | $ 149.75 | $ 48.83 | $ 60.34 | $ 24.43 | $ 26.50 |
| BALTIMORE, MD | $ 93.49 | $ 42.14 | $ 62.58 | $ 16.22 | $ 21.35 |
| CLEVELAND, OH | $ 97.29 | $ 33.09 | $ 49.90 | $ 14.69 | $ 12.79 |
| COLUMBUS, OH | $ 64.09 | $ 27.10 | $ 34.00 | $ 12.86 | $ 14.15 |
| CINCINNATI, OH | $ 61.91 | $ 19.99 | $ 32.66 | $ 12.53 | $ 11.20 |

The 25-34 CPM is extremely high as this demo has the most limited viewership.

By increasing the target demo, and omitting the 25-34 segment, CPMs drop substantially.

# Channel Tactics - TV

Buying to a 35-64 demo will still provide coverage of other demos

| A 35-64 | A 25-34 | A 25-49 | A 25-54 | A 25-64 | A 55+ |
|---|---|---|---|---|---|
| 50.2 | 10.8 | 32.0 | 31.3 | 41.8 | 70.5 |

A weekly schedule of 50 TRPs will still serve 10 TRPs to the 25-34 demo. The same buy would serve over 70 TRPs to a 55+ demo, which shows the efficiency of this medium with the older segment.

## Schedule Parameters

- Early Morning and Early News/Fringe dayparts
- 50 TRPs/9 weeks/450 total
- Estimated reach/freq: 60%/7.5
- Utilize zoned cable where DMA cost is prohibitive (NYC)

TRP = targeted rating point

# Channel Tactics - CTV

**Connected TV is specific to television viewing within the Over-the-Top platform**
**CTV offers more efficient reach of the 25-34 age segment and extends reach to cord cutters**
**CTV offers targeting demographically, geographically and behaviorally**

- While the broadcast CPM for the 25-34 demo averages over $100 for broadcast, it ranges from $35-45 for CTV depending on targeting filters applied
- 182MM Connected TV users in US in 2018
  - 74% of US TV homes have at least one television connected to the internet
  - 29% of adults in US TV homes watch video via a connected TV device daily
- Non-skippable
- Target by:
  - Age
  - Geography (down to zip)
  - Interests (e.g. travel intender)
  - Retarget from landing page pixel
- Target long-form, full episode content on TV screens (vs. desktop/ mobile/tablet) – NOT short form video
- Can track with Adara pixels

## CTV Access


Source: Leichtman Research Group - Connected and HD TVs XIV – June 2018 and eMarketer – July 2018

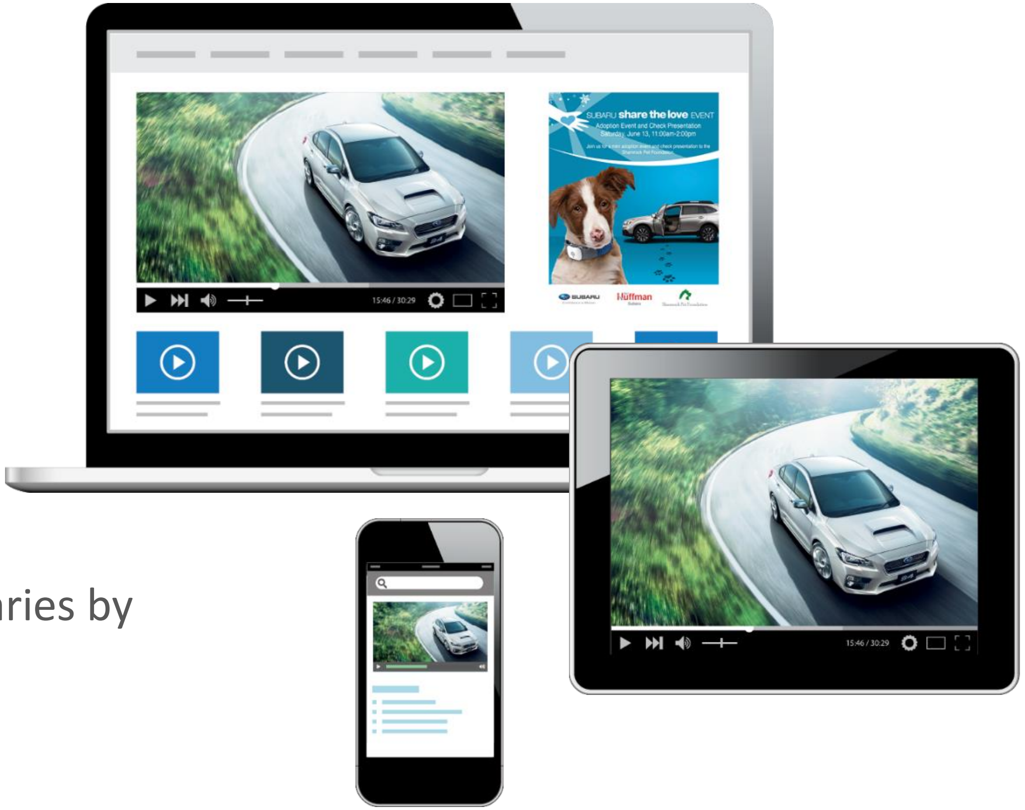
CPM = cost per thousand impressions

# Channel Tactics – Online Video

**OLV will extend the visual element of TV with the efficiency and targeting capability of digital.**

## Pre-roll Video

- All user-initiated
- Brand-safe inventory
- :15 or :30 formats
- Available across devices
- Layer in audience, site and geo-targeting
- Retarget from landing page pixel
- Mainly skippable to maintain user experience but varies by publisher, completion rates average 60-70%



# Channel Tactics – Travel Platforms

**Reach travel intenders within the booking path**

**Flight later than TV (Awareness) to affect Consideration when researching online**

- Utilize display tactics only as video is more expensive and will be tested as a separate line item
- Utilize performance learning from 2018 to allocate budget
- Focus on platforms that deliver ads to the travel intender on various sites vs. on booking sites only
  - Focus on intersecting with consumer throughout their online activity when awareness and consideration can still be affected
  - Ads on travel sites only may show higher ROI, but may be capturing a booking that has already been earned
- Include only those platforms which accept Adara pixels in order to track ROI more comparatively

**Consideration Set**

ADARA
SOJERN
CONVERSANT
tripadvisor
travelspike
Expedia
TRAVELZOO
priceline.com

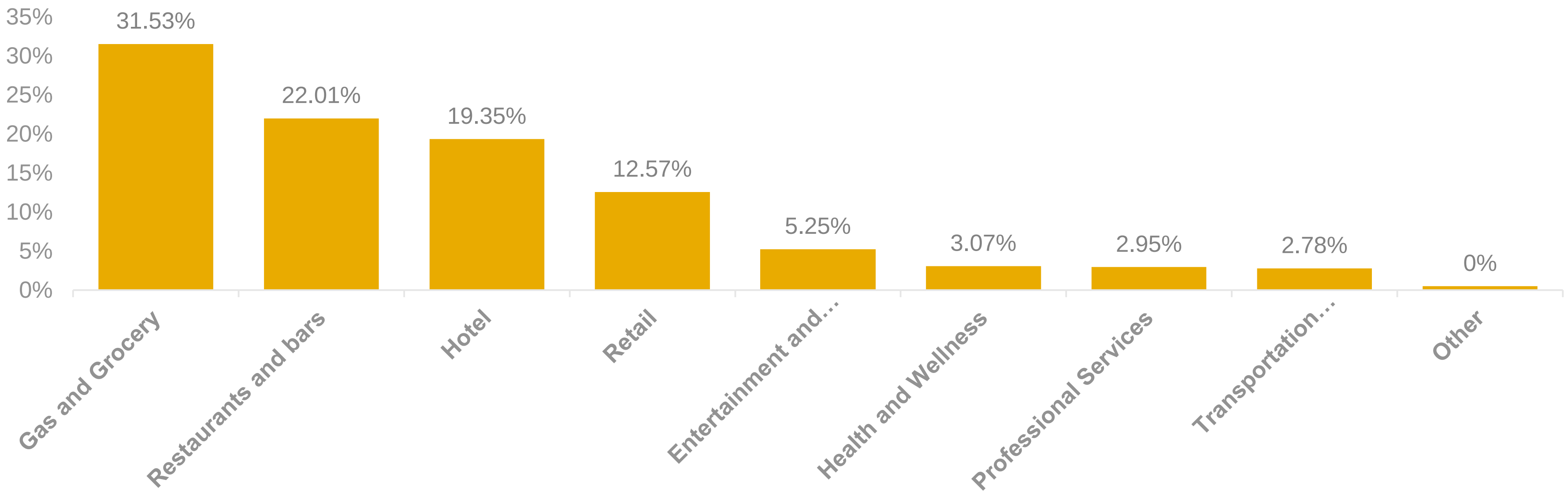
# Channel Tactics – Travel Platforms

Conversant offers a **Net Economic Impact** (NEI) report for a minimum spend of $140K over a calendar year. The report cannot be delivered until after the minimum is spent.

NEI Measurement will report back on total transactions, revenue, unique transactors, average spend per person and ROAS.

Reporting is all-touch attribution (de-duplicated) with a 90-day post-impression window.

## Sample Revenue by Category Breakdown




| Aggregate Transaction Results | |
|---|---|
| Transactions | XXX |
| Revenue | XXX |
| Unique Transactors | XXX |
| Average Spend per person | XXX |
| ROAS | XXX |

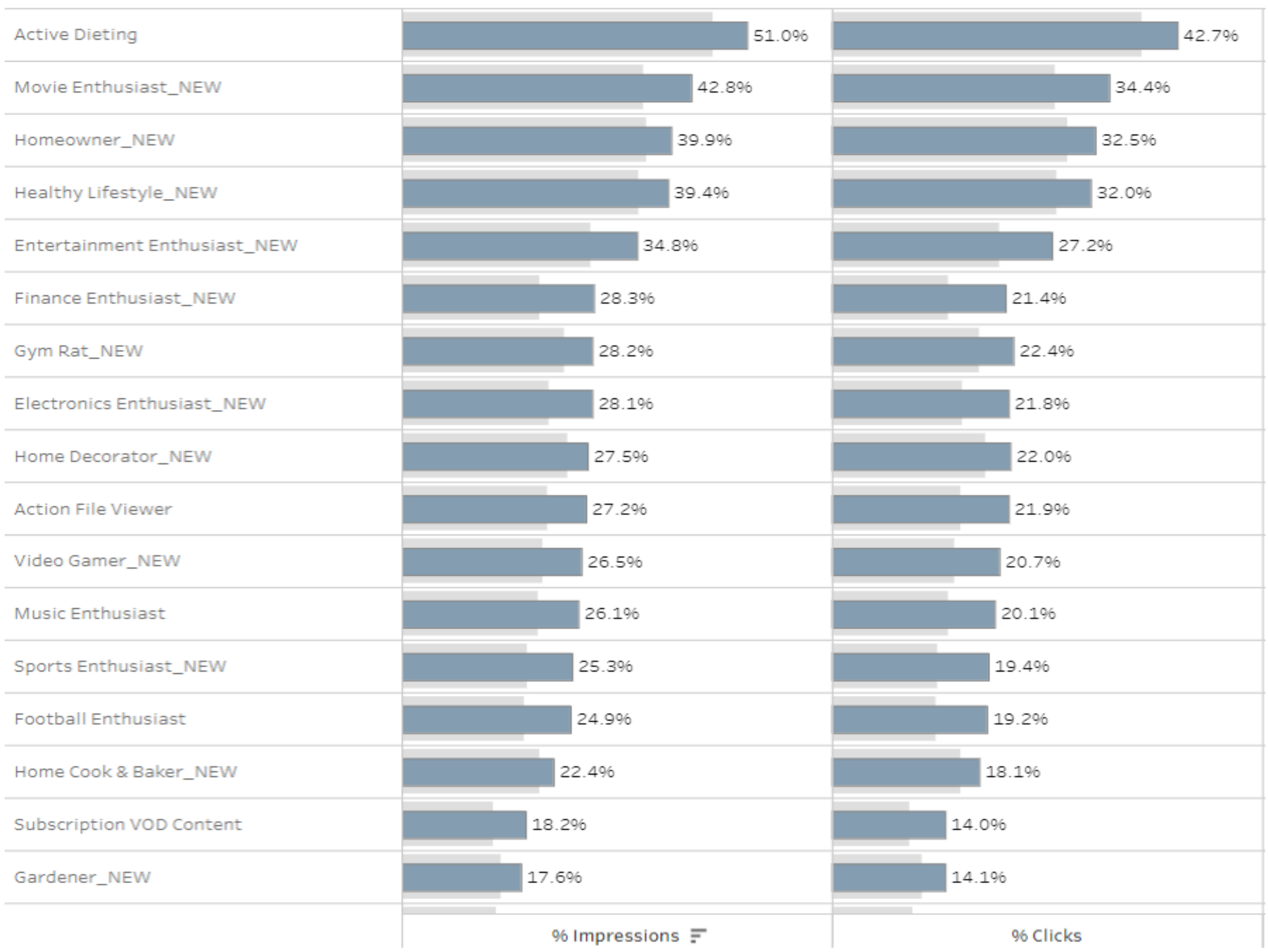
# Channel Tactics – Travel Platforms

CONVERSANT

Reporting will provide classification of the responding audience. In addition to age, income, education, origin market, conversant is able to provide **Behavioral Attribute Insights**.

This additional layer may provide further insights into our ideal target segment.

Based off campaign targeting, what else do we know about our audience?



# Channel Tactics – Programmatic Display

**Efficient targeting of the travel intender within their booking path**

**Flight later than TV (Awareness) to affect Consideration/Booking**

**Compare Adara performance with Travel Platforms**

- Automated, data-driven buying and optimizations
- Real time bidding vs. pre-bought impressions
- Nimble/real time optimizations based on KPI
- Utilize various targeting methods and tools to efficiently intersect with audience online
- Whitelist/blacklist site options
- Typically the most efficient tactics – compare performance to travel platforms

## Targeting Options

**Behavioral Targeting** - Identify and serve ads to individuals who fit into the pillar audiences using third party data

**Cross Device & Domain Retargeting** - help to keep brand top of mind and ultimately drive to a lower funnel conversion

**CRM data Matching + Look Alike Modeling** - Target the exact people on first party lists and also create look alike audiences to target people with similar attributes

**Contextual Targeting -** serve ads next to relevant web content

**PMP (Private Marketplace) -** Guaranteed inventory on key, relevant websites like Travelchannel.com, HGTV.com, Time.com

**PushSpring** – App Download Targeting, targeting people based on the apps they download (e.g. Kayak, Hilton, American Airlines, Uber)

**Native -** Designed to blend into the surrounding content of a website

# Channel Tactics - SEM

**Capture engagement from the paid efforts, adding keywords specific to the campaign**

**Drive to relevant site content with a focus on Accommodations conversions for out-of-state visitors**

SEM Campaign Structure

| | IN-STATE | OUT-OF-STATE |
|---|---|---|
| **Goals:** | E-Newsletter Sign Up<br>View Travel Guide Online | Accommodations Search<br>Travel Guide Mail Order<br>View Travel Guide Online |
| **Geography:** | Maryland | Ohio<br>New York<br>New Jersey<br>Pennsylvania<br>Virginia<br>West Virginia<br>Delaware<br>Washington, D.C. |
| **Keyword Categories:** | Brand<br>Things to Do<br>Headline Events<br>Near Me<br>Specific Events/Activity Terms<br>General Event/Activity Terms | Brand<br>Things to Do<br>Headline Events<br>Places to Stay |

# Channel Tactics – African American

## Media Coverage

The African American audience will continue to be reached within general audience media as well as targeted with specific tactics which can be measured and compared.

**Current TV coverage**

The most efficient coverage of the African American audience is typically within general audience media.

Programming such as early morning and evening news are viewed across the population and will skew toward a slightly more educated and higher income audience.

Programming that is specifically targeted to an African American audience can be expensive and younger skewing.

Using the Spring 2018 TV buy example we can see the coverage we will have of the African American audience.

Without having to alter the schedule programming, we achieve equal coverage (and above) of the AA target as the general target.

| Market | A25-54 TRPs | African American TRPs |
|---|---|---|
| Baltimore | 208.4 | 220.7 |
| DC | 200.9 | 299.9 |
| Philadelphia | 215.4 | 219.7 |
| Columbus | 526.8 | 642.6 |

# Channel Tactics – African American

**Dedicated Coverage**
Test in markets with the highest African American population percentage (DMA) to increase targeting options within a limited budget – Baltimore, DC, Philadelphia.

**Programmatic Display**
Utilize the same targeting options against the travel intender with the added filter of the African American audience.
Track with Adara pixels in order to compare ROI with general programmatic display.

**Pandora**
Layering an audio message will augment digital response.
Pandora is also able to add the African American audience to both demo and geo filters.

**Terrestrial Radio**
Terrestrial radio is broadcast (vs. one-to-one delivery like digital) and provides messaging within a community setting. Formats such as Urban and Urban A/C will be included based on their ratings strength in each market. Sponsorships will be utilized to extend name exposure.

| Market | % of Population |
|---|---|
| Baltimore | 28% |
| DC | 25% |
| Philadelphia | 20% |
| New York | 19% |
| Cleveland | 15% |
| Columbus | 13% |
| Cincinnati | 12% |
| Pittsburgh | 8% |
| Harrisburg | 7% |

# Channel Tactics – African American

**Terrestrial Radio**

- 4-week schedule – align with TV weeks
- 1-2 top ranked Urban stations per market

  Baltimore: (Radio One)
    - WERQ-FM/92.3 – Urban Contemporary
    - WWIN-FM/95.9 – Urban Adult Contemporary

  DC: (Radio One)
    - WKYS-FM/93.9 – Urban Contemporary
    - WMMJ-FM/102.3 – Urban Adult Contemporary

  Philadelphia: (iHeart)
    - WDAS-FM/105.3 – Urban Adult Contemporary
    - WUSL-FM/98.9 – Urban Contemporary

- :30 spot schedule incorporating :05/:10 News/Traffic/Weather sponsorships
- Value add sponsorships from each station such as:

  Winning Weekend Ticket Giveaway – OTD receives on-air promos as well as Facebook and Twitter mentions

# Channel Tactics – African American

**Budget**

In order to show a budget spend level against the African American audience (at minimum) we can assign dollars based on tactic coverage.

In the case of **Pandora, Programmatic display**, and **Terrestrial Radio** 100% of the budget is assigned to the AA audience.

For **TV/Cable**, we can assign a percentage of the total budget equal to the AA % of population b/c we know the general schedule will equally cover the AA audience (per spring buy example).

For example:

| Philadelphia | TRPs | IMPs | Pop | TV budget |
|---|---|---|---|---|
| General | 215 | 6,364,223 | 2,954,607 | $ 98,918 |
| African Am | 219 | 1,267,417 | 576,885 | $ 16,700 |
| % | | 20% | 20% | 20% |

Using the 20% coverage for this market, we can assign a dollar allocation to the AA audience

**Connected TV** coverage of the African American audience ranges from 12-17% depending on device/vendor. Using the minimum coverage of 12% for all markets, we can show allocated spend.

# Channel Tactics – African American

**Budget Allocation**

Considering only these tactics we will have achieved a budget allocation of over $285,000 or **20% of the total budget**.

When considering coverage of the remaining digital tactics, including the travel platforms, the total will exceed this amount.

| | TV/Cable | CTV | Pandora | Radio | Display | Total |
|---|---|---|---|---|---|---|
| Philly | $19,700 | | X | X | X | |
| DC | $56,095 | | X | X | X | |
| Baltimore | $11,853 | | X | X | X | |
| Cleveland | $11,542 | X | | | | |
| Pittsburgh | $ 4,854 | X | | | | |
| Harrisburg | $ 3,842 | X | | | | |
| New York | $28,215 | X | | | | |
| | $136,101 | $29,400 | $25,000 | $85,000 | $10,000 | **$285,501** |

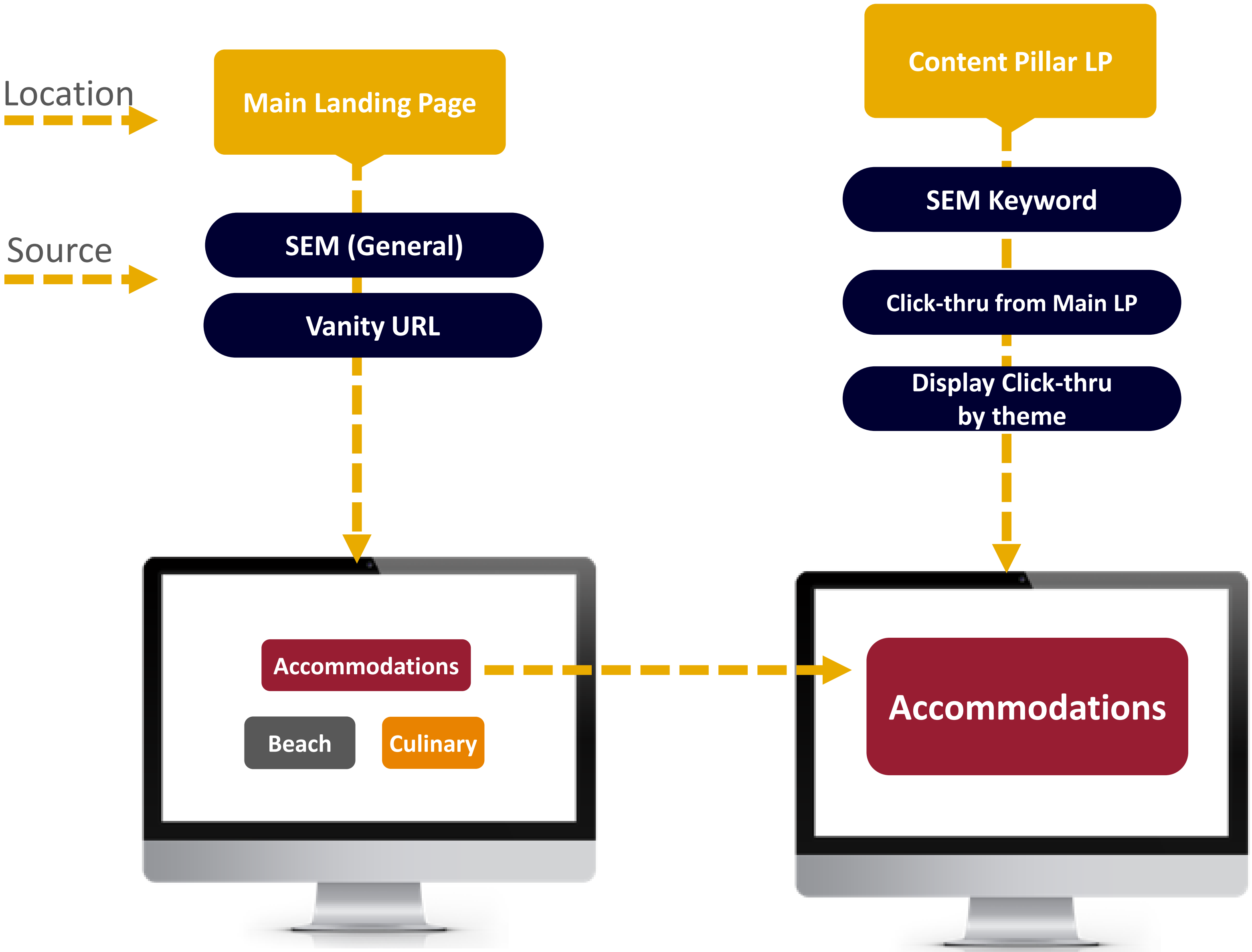
# The Results

# WAS IT EFFECTIVE?

THE RESULTS

KPIs and metrics are established early in the campaign process to guide optimization. With these, we know long before a campaign is over how successful it will be.

# Metrics – Direct to KPI




Sample click-path

The CTA for all advertising will drive to the campaign landing page which will offer options for further exploration and research.

Clicks on the landing page are considered conversions and can be optimized to and retargeted from.

These are considered proxy actions for the primary goal of a hotel booking.

# The Budget

# Budget Status

The media budget for the 2019 Spring/Summer Campaign was determined by removing all currently allocated funds from the total budget.

The Harriet Tubman budget of $50K has been allocated to the African American target within the Spring/Summer campaign.

2019 Campaign Media Budget: **$1,379,844**

| Medium | FY19 Media Budget | FY18 Media Budget |
|---|---|---|
| CAMPAIGN | | |
| TELEVISION | | |
| Spring | | $ 872,886 |
| Fall | $ 180,000 | $ 299,012 |
| WQED Sponsorship | $ 1,500 | |
| Total | $ 181,500 | $ 1,171,898 |
| RADIO | | |
| MD Minute - 12 mo | $ 100,683 | $ 98,474 |
| WYPR - 6 mo (6/25-12/30) | $ 12,330 | $ 24,660 |
| Total | $ 113,013 | $ 123,134 |
| DIGITAL | | |
| ADARA Summer Initiative | | $ 25,000 |
| Harriet Tubman | $ 50,000 | $ 100,000 |
| Savor Maryland - Spirits Month | $ 15,500 | $ 50,000 |
| Savor Maryland - Restaurant Wks and Jan-Mar Social | $ 12,500 | |
| SoulofAmerica.com | | $ 3,600 |
| TripAdvisor Destination Package | | $ 9,464 |
| Travel Guides | $ 7,762 | $ - |
| Spring Digital | | $ 533,750 |
| Summer of Music | $ 50,000 | $ 57,500 |
| Fall Digital | $ 120,000 | |
| Home for the Holidays | $ 20,000 | |
| DMO Co-op | $ 46,000 | |
| Adara IMPACT ($33K commitment; Addtl $16.5K billed Jul 2019) | $ 16,500 | |
| Total | $ 338,262 | $ 779,314 |
| PRINT | | |
| USA Today - Black History Month | | $ 14,500 |
| DMO Co-op | $ 94,000 | $ 140,600 |
| AAA - Jul/Aug 2018 | $ 8,000 | |
| AAA - Sep/Oct 2018 | $ 10,500 | $ 10,500 |
| AAA - March/April 2018 | | $ 14,700 |
| Brand USA Global Inspiration | $ 13,000 | |
| Brand USA Canada | $ 16,800 | $ 16,800 |
| Sip & Savor Magazine - Fall FY19, Spring FY20 | $ 3,100 | $ 3,100 |
| Sip & Savor Magazine - Nov | $ 2,495 | |
| SouthWest - Mar | $ 15,000 | $ 30,500 |
| Trade pub set aside ($14,154 approved) | $ 15,000 | $ 15,000 |
| MTAM Guide to MD boating services (6-pg advertorial) | $ 9,000 | $ 8,000 |
| Garden & Gun - Aug/Sep | $ 15,000 | $ 17,000 |
| Trail Guide | | $ 5,400 |
| Marinalife | $ 1,600 | |
| Canadian Traveller | $ 3,961 | |
| Southern Living - Sep | $ 4,165 | |
| Total | $ 211,621 | $ 276,100 |
| SEARCH | | |
| Search Annual Campaign | $ 225,000 | $ 225,000 |
| | | |
| Total | $ 225,000 | $ 225,000 |
| OOH | | |
| Orioles Behind Home Plate - Yankees, Blue Jays | | $ 17,500 |
| | | |
| Total | $ - | $ 17,500 |
| TOTAL allocation : | $ 1,069,396 | $ 2,592,946 |
| Total 2019 Budget: | $ 2,399,240 | |
| FY '19 Budget Remaining | $ 1,329,844 | |

# Flowchart

# Spring/Summer 2019

*Rates and timing are for planning purposes only and are subject to change.*

| | | | | 2019 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | JAN | | | | FEB | | | | MARCH | | | | | APRIL | | | | MAY | | | | JUNE | | | | | | |
| **Medium** | **Unit** | **Target** | **Geo** | 31 | 7 | 14 | 21 | 28 | 4 | 11 | 18 | 25 | 4 | 11 | 18 | 25 | 1 | 8 | 15 | 22 | 29 | 6 | 13 | 20 | 27 | 3 | 10 | 17 | 24 | **Weeks** | **Cost** |
| **BROADCAST TV/CABLE** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 620,278 |
| **TV** | :15s/:30s | A35-64 | DMA | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Harrisburg | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | | | | 9 | $ 54,886 |
| Pittsburgh | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | | | | 9 | $ 60,707 |
| Baltimore | | | | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | | | | | | 4 | $ 40,320 |
| Philadelphia | | | | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | | | | | | 4 | $ 98,918 |
| DC | | | | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | | | | | | 4 | $ 146,261 |
| Cleveland | | | | | | | | | | | | | | | | | | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | | | | 9 | $ 70,686 |
| **CABLE** | :30s | A35-64 | Long Island/ N. NJ zones | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New York | | | | | | | | | | | | | | | | | | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | | | | 9 | $ 148,500 |
| **OTT (over-the-top)** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 245,000 |
| **Connected TV** | :30s | A25-39/travel intender | DMA | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Harrisburg | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 35,000 |
| Pittsburgh | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 50,000 |
| New York | | | Long Island/ N. NJ | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 100,000 |
| Cleveland | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 60,000 |
| **VIDEO** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 50,000 |
| **Pre-roll** | :15 | travel intender | All | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 50,000 |
| **DISPLAY/RETARGETING** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 320,000 |
| **Travel Platforms** | Banners | travel intender | All | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Adara | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 40,000 |
| Conversant | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 50,000 |
| Sojern | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 60,000 |
| Travel Spike | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 55,000 |
| Trip Advisor | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 55,000 |
| **Programmatic** | Banners | travel intender | All | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 50,000 |
| **Programmatic** | Banners | African American travel intender | Balt/Philly/DC | | | | | | | | | | | | | | | | | | | | | | | | | | | 9 | $ 10,000 |
| **AUDIO** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 110,000 |
| **Terrestrial** | :30 | A25-64 Urban formats | Metro | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 85,000 |
| Baltimore | | 25 TRPs/wk | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| Philadelphia | | 25 TRPs/wk | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| DC | | 25 TRPs/wk | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| **Pandora** | :30/banner | African American/ A25-64/HHI$75+ | DMA | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 25,000 |
| Baltimore | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| Philadelphia | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| DC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | |
| **SOCIAL** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 20,000 |
| **FB/IG/Pinterest** | boost/RT | travel intender thru-state traveler | All | | | | | | | | | | | | | | | | | | | | | | | | | | | 14 | $ 20,000 |
| **CONTINGENCY** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | $ 14,566 |

| | | | |
|---|---|---|---|
| **All Markets:** | Cleveland | Pittsburgh | Baltimore |
| | Columbus | Harrisburg | DC |
| | Cincinnati | Philadelphia | New York |

**TOTAL:** $ 1,379,844

**BUDGET:** $ 1,379,844

(incl $50K HT budget)

# FY 2019

FY2019

JUL: 25, 2, 9, 16, 23 | AUG: 30, 6, 13, 20 | SEP: 27, 3, 10, 17, 24 | OCT: 1, 8, 15, 22 | NOV: 29, 5, 12, 19 | DEC: 26, 3, 10, 17, 24 | JAN: 31, 7, 14, 21 | FEB: 28, 4, 11, 18 | MARCH: 25, 4, 11, 18, 25 | APRIL: 1, 8, 15, 22 | MAY: 29, 6, 13, 20 | JUNE: 27, 3, 10, 17, 24

| CAMPAIGN | Unit | Schedule | 2019 Media Budget |
|---|---|---|---|
| **TELEVISION** | | | |
| Fall Campaign | :15 | | $ 180,000 |
| WQED Sponsorship | Underwriting | | $ 1,500 |
| Spring - Connected TV | :30 | | $ 245,000 |
| Spring - Broadcast TV and Cable | :15/:30 | | $ 620,278 |
| **RADIO** | | | |
| MD Minute | | | $ 100,683 |
| WYPR | | | $ 12,330 |
| Spring Campaign - Pandora | :30/banner | | $ 25,000 |
| Spring Campaign - Terrestrial | :30 | | $ 85,000 |
| **DIGITAL** | | | |
| Travel Guides | | | $ 7,762 |
| Fall Campaign | Social/Display/Mobile | | $ 120,000 |
| Savor-Spirits Month | | | $ 15,500 |
| Home for the Holidays | | | $ 20,000 |
| DMO Digital Co-op | | | $ 46,000 |
| Adara Impact | | | $ 16,500 |
| Savor-Restaurant Wk | | | $ 12,500 |
| Spring - Video | :15 | | $ 50,000 |
| Spring - Display | Banners | | $ 320,000 |
| Spring - Social | | | $ 20,000 |
| Summer of Music TBD | | | $ 50,000 |
| **PRINT** | | | |
| AAA-Jul/Aug | Full Page 4C | | $ 8,000 |
| AAA-Sep/Oct | 2/3 Page 4C | | $ 10,500 |
| Sip & Savor - Fall | Full Page 4C | | $ 3,100 |
| Sip & Savor - Winter | Full Page 4C | | $ 2,495 |
| Trade | Various | | $ 15,000 |
| MTAM Guide to Boating | 6 Pg Adv | Annual | $ 9,000 |
| Marinalife | Full Page 4C | Summer | $ 1,600 |
| Canadian Traveller | Full Page 4C | Annual | $ 3,961 |
| Southern Living - Sep | Full Page 4C | | $ 4,165 |
| Garden & Gun - Aug/Sep | Full Page 4C | | $ 15,000 |
| Brand USA Inspiration | 1/2 Page 4C | Annual | $ 13,000 |
| Brand USA Canada | FP 4C plus Digital | | $ 16,800 |
| Southwest - Mar | Full Page 4C | | $ 15,000 |
| DMO Print Co-op | | | $ 94,000 |
| **SEARCH** | | | |
| Search Annual Campaign | keywords | | $ 225,000 |
| **CONTINGENCY** | | | |
| | | | $ 14,566 |
| | | **TOTAL** | **$ 2,399,240** |
| | | **2019 Budget** | **$ 2,399,240** |
| | | **FY19 Budget Remaining** | **$ -** |

# Key Takeaways & Next Steps

# Key Takeaways

- Focus efforts early in consumer journey to make the greatest impact.
- Utilize full-funnel tactics to build brand and drive ROI.
- Utilize Adara Impact metrics as a relevant comparison of vendor performance.

# Next Steps

| Deliverable | Due Date |
|---|---|
| OTD approve media plan | Feb 25 |
| Negotiate and place media | Feb 27 start |
| Broadcast and CTV media launches | w/o April 8 |
| Digital media launches | April 29 |
| Provide performance reports | SEM – monthly<br>Campaign – midway status, final wrap report |

# Appendix

Maryland
OFFICE OF TOURISM

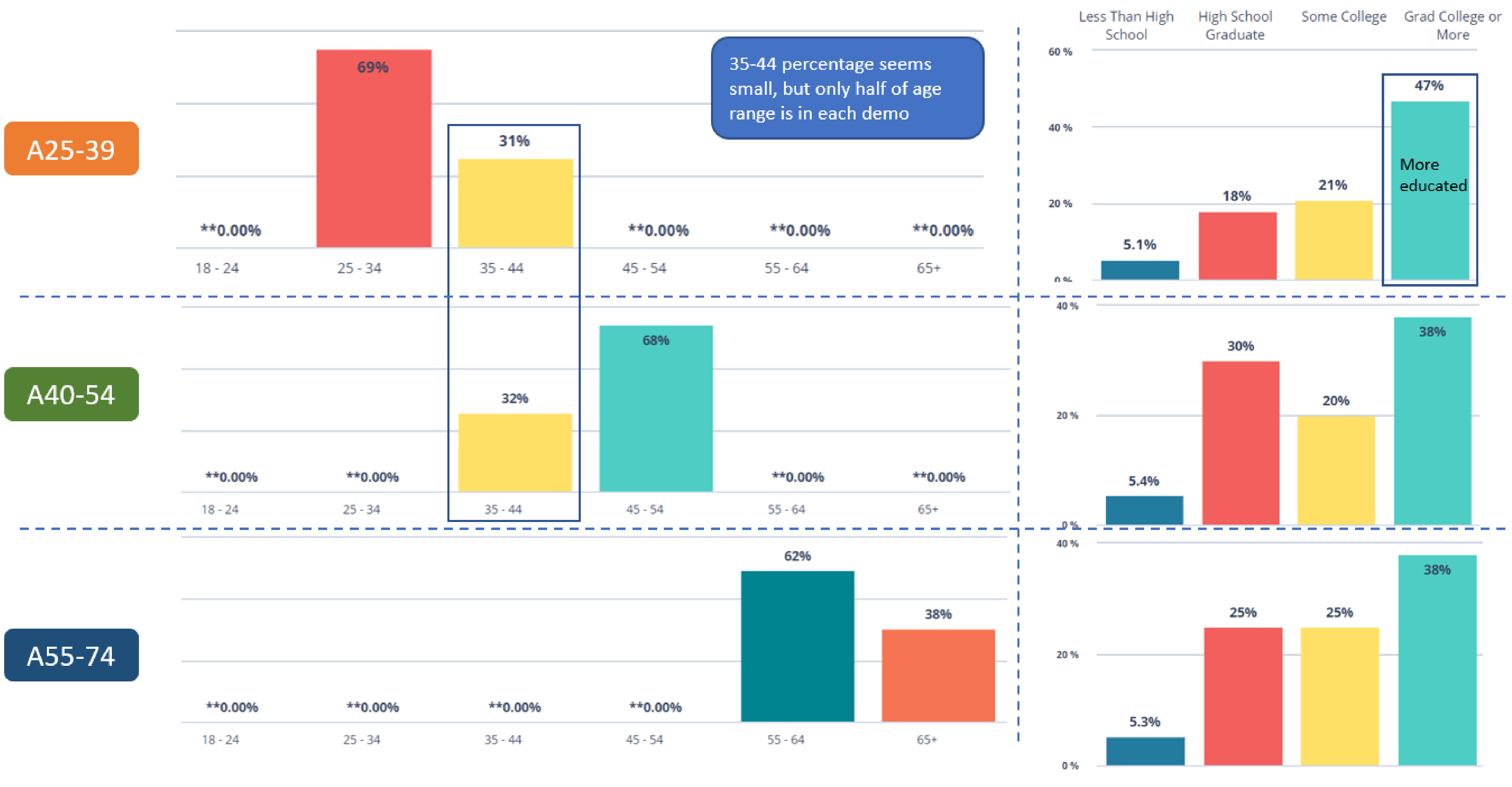
# Channel Tactics – Travel Platforms

| Company | Product | Tactics | Unit Pricing | Adara Pixels | Targeting | Reporting | Attribution | Minimum spend | Past use/ performance |
|---|---|---|---|---|---|---|---|---|---|
| **Adara** | Run digital ads on partner sites to intersect with user displaying travel behavior | Display<br>Video<br>Retargeting | CPM<br>$7<br>$18<br>$5 | YES | Primary target people in travel planning process – layer on Age, Geo, Family and Adventure seekers | ROAS<br>Booking Revenue<br>CTR<br>CPB<br>Origin markets | Booking measurement through 190+ travel data partners (hotel groups, airlines, car rental) | $5K/month<br>$1K/line item | SS18 ROI of $26:1 (flight and hotel) |
| **Sojern** | Run digital ads on partner sites to intersect with user displaying travel behavior | Display<br>Native*<br>Video*<br>*recommended for $100K level only | CPM<br>$6<br>$7.50<br>$16 | YES | Primary target people in travel planning process – layer on Age, Geo as secondary | ROAS<br>Searches<br>Bookings<br>Revenue<br>Demo<br>CTR<br>Creative | Booking measurement through 80+ travel data partners (hotel groups, airlines, car rental) | $30-50K/month | SS18 ROI of $94:1 (flight and hotel) |
| **Conversant** | Run digital ads on partner sites to intersect with user displaying travel behavior | Display<br>Video | CPM<br>$7<br>$23 | YES | Intent and transactional travel behavior across 200MM adults via sister company Epsilon | **Net Economic Impact (NEI) reporting requires $150K spend*<br>Visitor Volume<br>Visitor Revenue<br>ROAS<br>Category spend (hotel, transportation, dining, retail, entertainment) | Directly match back individuals messaged during campaign to correlating in-market spend (any-touch method) through partnerships w/in credit card and retail industry. | $150K over calendar year for NEI | New product |
| **Trip Advisor** | Trip Advisor – ads on booking site<br><br>TA Everywhere – retargeting audiences on other sites who've expressed interest in MD on TA site in last 30 days | Display<br><br>Display<br>Video | CPM<br>$24<br><br>$8<br>$22 | YES | On-site: Demo, geo, search location<br>Off-site: retarget primary audience | ROAS<br>Hotel Booking<br>Room nights<br>CTR | Booking data on Trip Advisor and 3rd party booking partners | $15K/campaign including $10K min on TA Everywhere) | SS18 ROI of $116:1 (hotel ONLY) |

# Channel Tactics – Travel Platforms

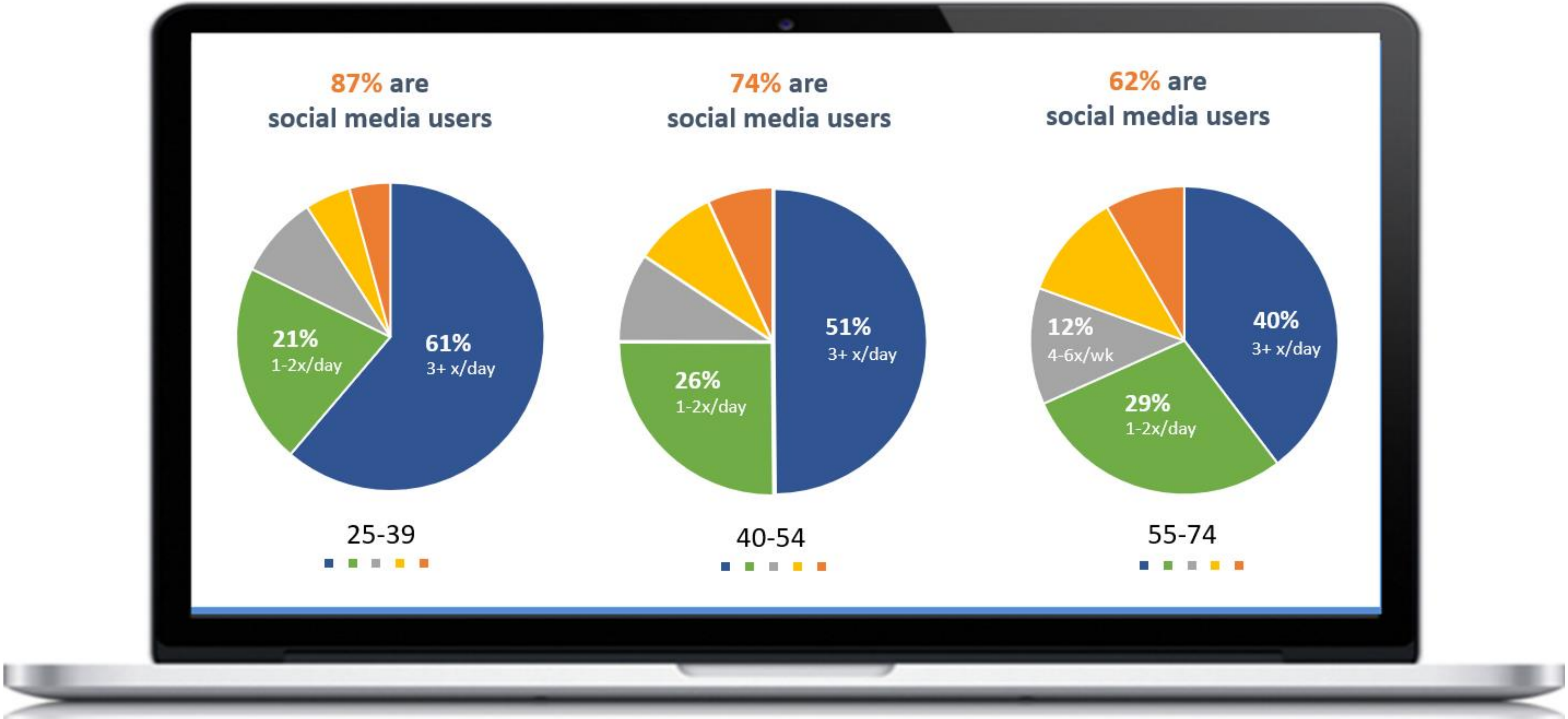
| Company | Product | Tactics | Unit Pricing | Adara Pixels | Targeting | Reporting | Attribution | Minimum spend | Past use/ performance |
|---|---|---|---|---|---|---|---|---|---|
| **Travel Spike** | Run digital ads on partner sites to intersect with user displaying travel behavior | Premium Display<br>Newsletter/email<br>Video | $8 CPM<br>$.75 CPC<br>$.11 CPV | YES | Primary target people in travel planning process – layer on Age, Geo as secondary | CTR<br>Conversions<br>Video completion rate | n/a – no booking data | $20K/campaign | Used for SS18 – no booking data/ROI reported |
| **Expedia** | Ads on booking sites | Display – Rt pos<br>Display ROS<br>Native Marquee | CPM<br>$18<br>$7<br>$34 | NO | On site:<br>Travel Geo<br>Trip Details<br>Travel intent & booking data | ROAS<br>Bookings<br>Room nights<br>Booking window<br>Origin markets<br>Hotel ADR | Booking data on Expedia sites | $10K/campaign | n/a |
| **Travelzoo** | Sponsored stories on site promoted through email, social media and site placements. | Email, social, web | CPM<br>$9 | YES | On site:<br>Travel audience<br>Geo<br>Additional social targeting | Reach<br>Time on story<br>Scroll rate<br>CPV<br>CTR | n/a – no booking data | $50K/campaign | n/a |
| **Priceline** | Ads on booking site | Native, email, display | CPM<br>$17 | NO | Geo<br>Demo | ROAS<br>Bookings/Revenue<br>CTR | Booking data on Priceline | $5K/month | n/a |
| **Programmatic** | Behaviorally target travel intenders via bidding system | Display<br>Video<br>Retargeting | CPM<br>$6<br>$22<br>$6 | YES | Travel behavior<br>Demo<br>Geo | CTR<br>Conversions<br>Video Completion Rate<br><br>(all Adara Impact data) | Via Adara Impact | n/a | n/a for OTD SS18 |

# Demographic Profile (Age/Education)

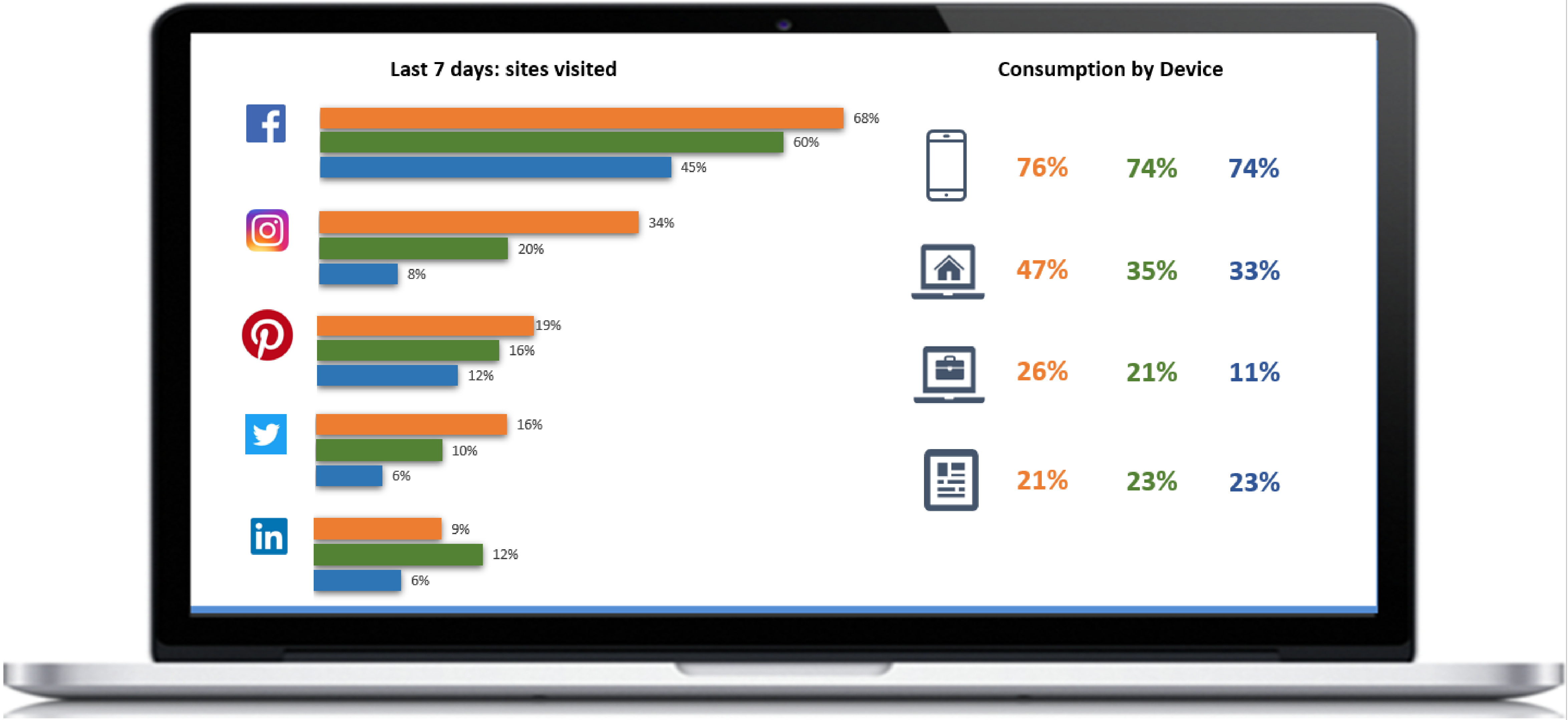


# Social Media Activity

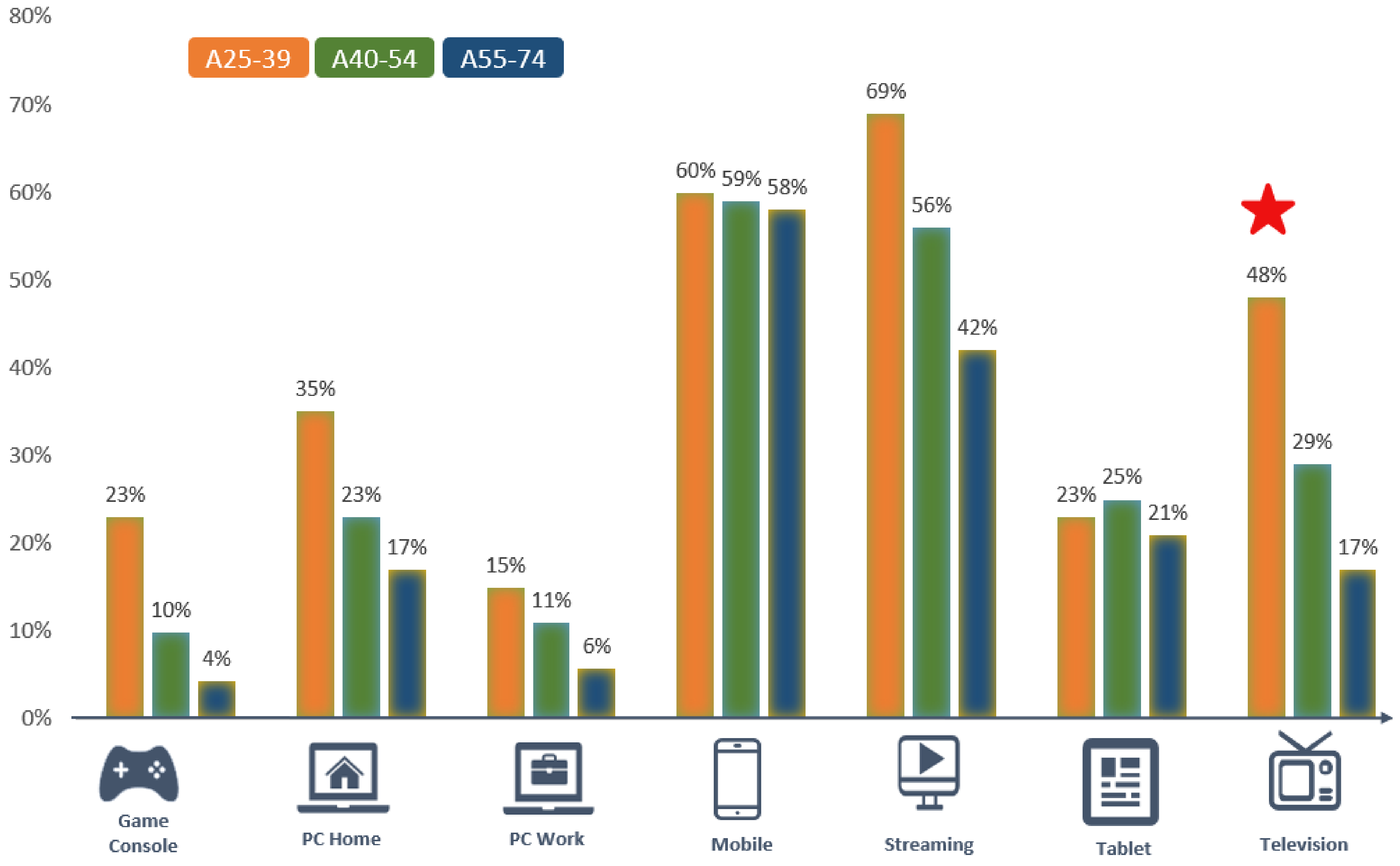
The younger demo offers a larger segment of social media users as well as daily usage.



# Social Media Activity



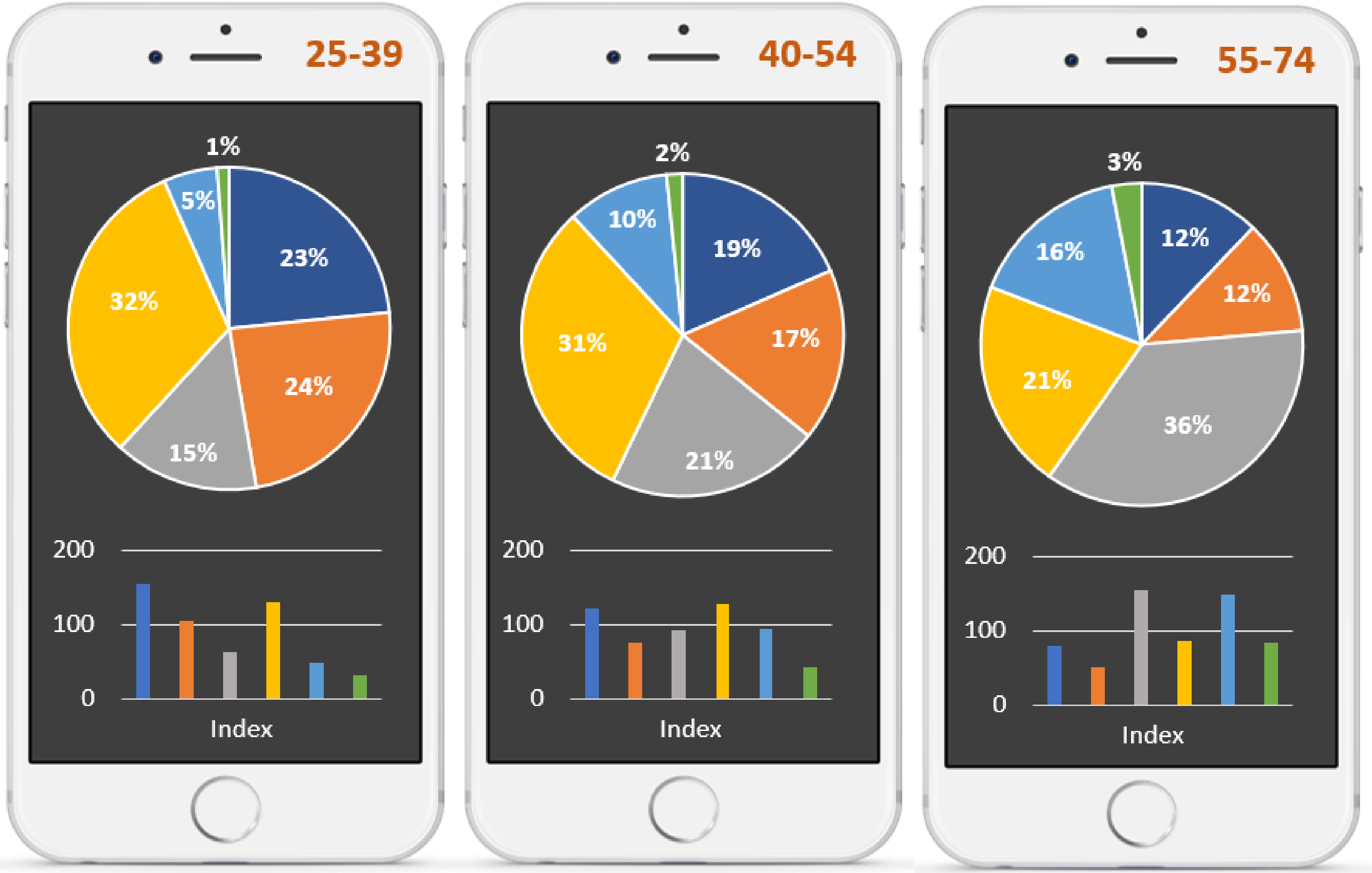
# Downloaded/Streamed Video Platform




**Streaming Media Devices**:
- Amazon Fire TV
- Apple TV
- Cable/Satellite box
- DVD/Blu-Ray Player
- Google Chromecast
- Roku
- TiVo
- Game console

**Television**
- Smart TV

# Mobile World Segmentation




**MOBILE PROFESSIONALS**
Multiple feature users; cell phones help them keep up with their professional life in additional to their personal life; the cell phone has become their all-in-one device for communication and information needs

**MOBIRATI**
Represents the mobile generation; can't imagine life without cell phones; cell phones are part of their everyday lives

**BASIC PLANNERS**
Not into cell phones or the world of technology; use their cell phone for the basics; cell phone is just another communication device

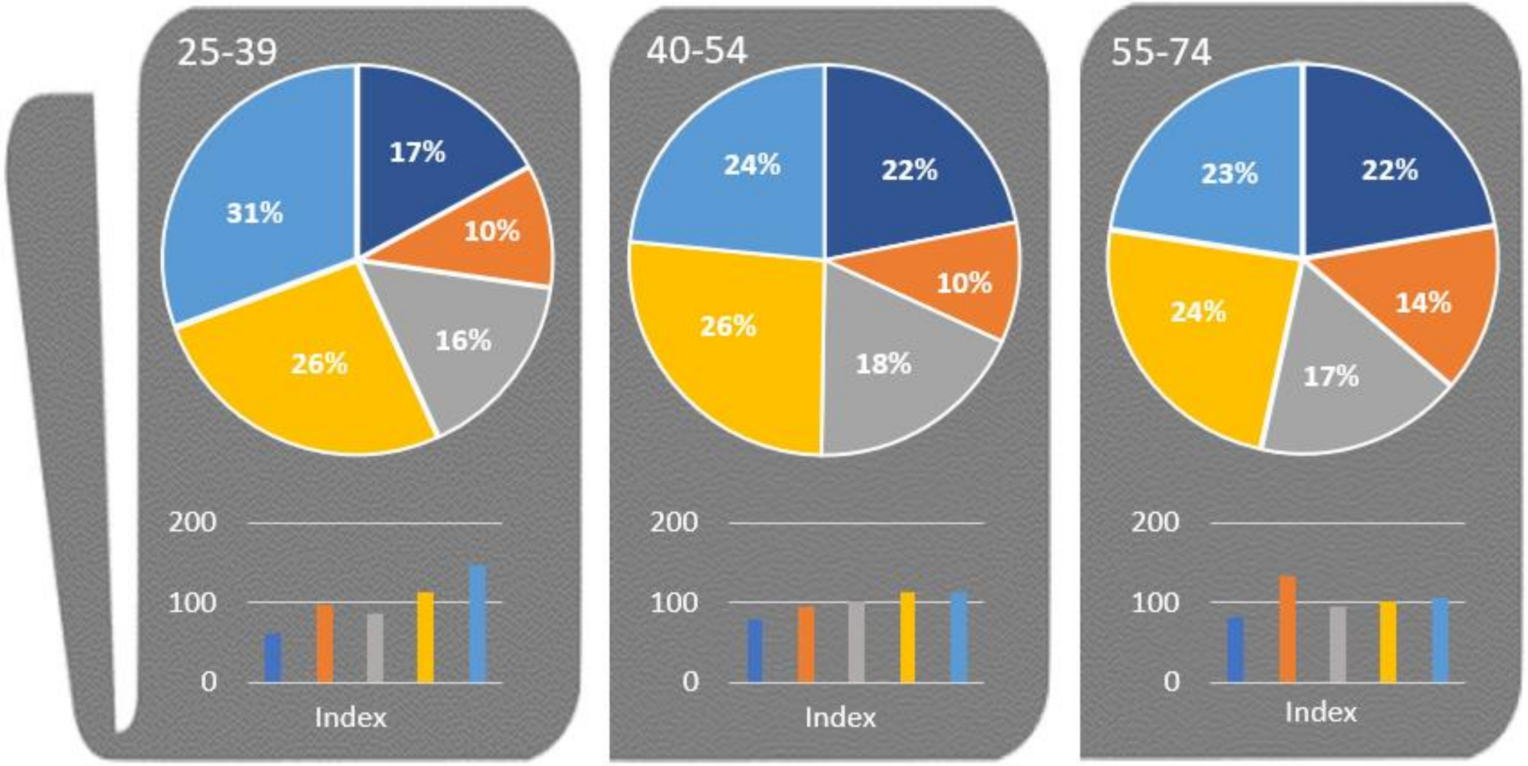
**SOCIAL CONNECTORS**
Communication is central in their lives; cell phones allow them to keep up to date with friends and social events and serve as a bridge to their social world

**PROGRAMMATIC ADOPTERS**
Still learning there are other things to do with your phone beyond making calls; cell phones are becoming more a part of their everyday lives but still more functional than entertaining

**DO NOT OWN CELL PHONE**

The younger demos use their phone for social connection as well as work functions, while the older demo is much more basic in their use and reliance on the device.

# Economic Outlook Segmentation




**FACING CHALLENGES**
Facing challenges and the realities of the current economic situation; won't be purchasing big ticket or household items due to poor consumer confidence; their financial situations are worse than they were 12 months ago; they are not hopeful about their personal financial futures or that of the U.S. economy.

**FINANCIAL NESTERS**
Trying to maintain lifestyle with a "business as usual" outlook but haven't lost sight of the changes taking place in the U.S. economy; do not expect the economy of their personal financial situation to improve any time soon, but continue to make purchases.

**ECONOMICALLY INDIFFERENT**
Out of the mainstream; indifferent to the economic downturn; don't have a sense that the economy is slowing down or getting better; modest financial situation is not a result of the current economy.

**FISCALLY FIT**
More flexible and adaptive to changes in the market; optimistic, feel financially secure and well positioned during the current downturn; keep spending under control with few big-or even medium- ticket items planned in the near future.

**CONFIDENT SPENDERS**
Largely untouched by the current economy and continue their regular spending or even increase their spend; confident about their current economic condition, financially secure and even willing to take investment risks.

Despite similar household incomes, the younger demo has a higher portion of Confident Spenders. Their life stage allows them to be less concerned with future financial issues.

# Attitudes (General)

Response = AGREE A LOT

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| I ENJOY SPENDING TIME WITH MY FAMILY | 64.5% | 12.0% | 103 | 65.9% | 11.0% | 105 | 69.0% | 12.4% | 110 |
| IT IS IMPORTANT TO CONTINUE LEARNING NEW THINGS THROUGHOUT YOUR LIFE | 60.8% | 12.4% | 107 | 59.0% | 10.9% | 104 | 59.0% | 11.7% | 104 |
| FAMILY LIFE IS THE MOST IMPORTANT THING TO ME | 46.3% | 10.9% | 94 | 53.7% | 11.5% | 109 | 53.6% | 12.3% | 109 |
| IT IS IMPORTANT TO BE WELL-INFORMED ABOUT THINGS | 40.8% | 11.5% | 99 | 42.0% | 10.7% | 102 | 44.9% | 12.2% | 109 |
| I LIKE SPENDING MOST OF MY TIME AT HOME WITH MY FAMILY | 33.1% | 11.1% | 96 | 38.0% | 11.5% | 110 | 37.6% | 12.2% | 109 |
| MUSIC IS AN IMPORTANT PART OF MY LIFE | 30.8% | 12.4% | 107 | 28.0% | 10.2% | 97 | 24.7% | 9.6% | 85 |
| I PREFER TO SPEND A QUIET EVENING AT HOME THAN TO GO OUT | 29.1% | 10.4% | 89 | 35.0% | 11.3% | 107 | 33.9% | 11.7% | 104 |
| I AM INTERESTED IN OTHER CULTURES | 26.6% | 14.6% | 126 | 19.7% | 9.8% | 93 | 19.5% | 10.4% | 93 |
| I CONSIDER MYSELF TO BE A CREATIVE PERSON | 26.3% | 11.8% | 102 | 24.4% | 9.9% | 94 | 27.6% | 12.0% | 106 |
| I LIKE TO PROVIDE MY CHILDREN WITH THE THINGS I DIDN'T HAVE AS A CHILD | 23.6% | 11.5% | 99 | 27.1% | 11.9% | 114 | 23.8% | 11.2% | 100 |
| I'M ALWAYS LOOKING FOR NEW IDEAS TO IMPROVE MY HOME | 23.5% | 13.5% | 117 | 21.8% | 11.3% | 108 | 18.2% | 10.2% | 90 |
| I ENJOY ENTERTAINING PEOPLE IN MY HOME | 23.0% | 12.7% | 110 | 18.7% | 9.3% | 89 | 18.9% | 10.1% | 90 |
| IT IS IMPORTANT MY FAMILY THINKS I AM DOING WELL | 20.5% | 12.8% | 110 | 15.5% | 8.7% | 83 | 16.5% | 10.0% | 89 |
| I WANT TO GET TO THE VERY TOP IN MY CAREER | 19.7% | 15.4% | 133 | 14.8% | 10.5% | 100 | 5.2% | 4.0% | 35 |
| I CONSIDER MYSELF INTERESTED IN THE ARTS | 15.6% | 13.1% | 113 | 10.5% | 8.0% | 76 | 12.8% | 10.4% | 93 |

Younger segment has more concern about career and socializing.
Want to be viewed positively by others.

Vertical % = Coverage of Target Audience
Horizontal % = Composition of Target Audience
Index = Composition as compared to average adult (100=average)

# Attitudes (Lifestyle/Internet)

Response = AGREE A LOT

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| WHEN I NEED INFORMATION THE FIRST PLACE I LOOK IS THE INTERNET | 49.0% | 15.6% | 134 | 40.2% | 11.6% | 110 | 32.0% | 9.9% | 88 |
| THE INTERNET HAS CHANGED THE WAY I GET INFORMATION ABOUT PRODUCTS AND SERVICES | 45.6% | 15.5% | 133 | 36.8% | 11.3% | 108 | 32.5% | 10.7% | 95 |
| THE INTERNET HELPS ME PLAN AND BOOK TRAVEL | 41.7% | 17.1% | 148 | 32.5% | 12.1% | 115 | 27.7% | 11.0% | 98 |
| IT'S IMPORTANT FOR ME TO HAVE INTERNET ACCESS WHEN I AM "ON-THE-GO" - AWAY FROM HOME OR WORK | 40.5% | 17.0% | 147 | 28.6% | 10.8% | 103 | 24.5% | 10.0% | 89 |
| I GET MORE AND MORE OF MY NEWS FROM THE INTERNET | 35.8% | 17.6% | 152 | 25.6% | 11.4% | 109 | 16.1% | 7.7% | 68 |
| I SPEND LESS TIME READING NEWSPAPERS IN PRINT BECAUSE OF THE INTERNET | 33.3% | 16.1% | 138 | 26.0% | 11.3% | 108 | 18.5% | 8.6% | 77 |

Shift in internet use/dependence with age.

# Attitudes (Social Media)

Response = AGREE A LOT

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| I TALK ABOUT THINGS I SEE ON SOCIAL MEDIA/ NETWORKING WEBSITES IN FACE-TO-FACE CONVERSATIONS | 25.1% | 18.7% | 161 | 16.7% | 11.3% | 107 | 11.0% | 7.9% | 71 |
| I WOULD RATHER READ OTHER PEOPLE'S COMMENTS ON SOCIAL MEDIA/ NETWORKING WEBSITES THAN POST MY OWN | 18.4% | 14.9% | 128 | 16.3% | 11.9% | 113 | 14.4% | 11.2% | 100 |
| I OFTEN ACCESS SOCIAL MEDIA/ NETWORKING WEBSITES FROM DIFFERENT DEVICES | 15.5% | 20.2% | 174 | 7.7% | 9.1% | 87 | 4.7% | 5.9% | 52 |
| I PAY ATTENTION TO RATINGS AND REVIEWS POSTED ONLINE BY OTHER CONSUMERS | 14.9% | 17.5% | 151 | 10.4% | 11.1% | 105 | 5.8% | 6.6% | 58 |
| I LIKE TO FOLLOW MY FAVORITE BRANDS OR COMPANIES ON SOCIAL MEDIA/ NETWORKING WEBSITES | 11.7% | 19.3% | 166 | 5.5% | 8.2% | 79 | 1.5% | 2.4% | 21 |
| I OFTEN CLICK ON LINKS OR ITEMS POSTED BY OTHER PEOPLE ON SOCIAL MEDIA/ NETWORKING WEBSITES | 10.1% | 16.4% | 141 | 6.0% | 8.7% | 83 | 5.3% | 8.3% | 74 |
| I OFTEN POST OR COMMENT ON SOCIAL MEDIA/ NETWORKING WEBSITES | 9.7% | 14.4% | 124 | 7.6% | 10.2% | 97 | 5.3% | 7.6% | 68 |

Shift in social media engagement with age.

# Attitudes (Travel)

Response = AGREE A LOT

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| I LOVE THE IDEA OF TRAVELING ABROAD | 34.6% | 16.9% | 146 | 22.3% | 9.9% | 94 | 19.2% | 9.1% | 81 |
| I TRY TO GO SOMEWHERE DIFFERENT FOR VACATION EVERY TIME | 20.0% | 14.1% | 122 | 18.0% | 11.5% | 109 | 16.1% | 11.0% | 98 |
| I PREFER TRAVELING IN THE U.S. AS OPPOSED TO TRAVELING TO FOREIGN COUNTRIES | 17.4% | 7.3% | 63 | 28.1% | 10.6% | 101 | 38.4% | 15.5% | 138 |
| I'D RATHER TAKE TWO OR THREE SHORT QUICK VACATIONS THAN ONE LONG VACATION | 9.9% | 8.3% | 71 | 14.1% | 10.7% | 102 | 15.8% | 12.8% | 114 |
| I LIKE TO GO ON VACATION WHERE ACTIVITIES ARE ORGANIZED FOR ME | 9.8% | 12.3% | 106 | 8.1% | 9.2% | 87 | 8.7% | 10.6% | 94 |
| I WOULD BE WILLING TO MAKE TRAVEL ARRANGEMENTS THROUGH A COMPANY I HAVE NEVER HEARD OF | 8.1% | 17.3% | 149 | 5.3% | 10.4% | 99 | 4.0% | 8.2% | 73 |
| I TAKE VACATION EXPERIENCES THAT HELP DIFFERENTIATE ME FROM MY FRIENDS | 7.5% | 13.9% | 120 | 4.4% | 7.4% | 70 | 4.1% | 7.4% | 66 |

Younger segment prefers new/epic vacations and longer trips.
They must have social media bragging rights.

# Domestic Travel: last 12 months

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| YES | 75.0% | 13.2% | 113 | 73.2% | 11.6% | 111 | 76.9% | 13.1% | 116 |
| NO | 24.0% | 8.8% | 76 | 25.3% | 8.4% | 80 | 22.1% | 7.8% | 70 |
| DOM TRAV-# ROUND TRIPS STAYED OVERNIGHT: | Vertica | Horizonta | Index2 | Vertical | Horizonta | Index3 | Vertical | Horizonta | Index4 |
| 11 OR MORE | *3.9% | *14.6% | *126 | 3.6% | 12.2% | 116 | 3.2% | 11.4% | 101 |
| 6 to 10 | 6.2% | 15.7% | 135 | 5.4% | 12.3% | 117 | 5.7% | 14.1% | 126 |
| 4 to 5 | 11.6% | 15.9% | 137 | 9.1% | 11.3% | 107 | 11.7% | 15.6% | 139 |
| 3 | 8.0% | 13.4% | 115 | 7.8% | 11.9% | 113 | 8.5% | 13.9% | 123 |
| 2 | 12.8% | 14.7% | 126 | 11.8% | 12.3% | 117 | 15.1% | 16.8% | 150 |
| 1 | 13.1% | 12.9% | 111 | 14.9% | 13.3% | 126 | 12.7% | 12.1% | 107 |
| NONE | *2.0% | *7.2% | *62 | 2.5% | 8.3% | 79 | 2.5% | 8.7% | 78 |
| DOMESTIC TRAVEL-NIGHTS AWAY-LAST TRIP: | Vertica | Horizonta | Index2 | Vertical | Horizonta | Index3 | Vertical | Horizonta | Index4 |
| 8 OR MORE | 7.6% | 10.4% | 90 | 8.3% | 10.3% | 98 | 12.7% | 16.8% | 150 |
| 5 to 7 | 16.0% | 13.3% | 115 | 15.4% | 11.6% | 111 | 17.5% | 14.2% | 126 |
| 3 to 4 | 20.9% | 15.0% | 129 | 17.1% | 11.1% | 106 | 16.4% | 11.4% | 101 |
| 2 | 14.2% | 16.4% | 141 | 12.9% | 13.5% | 128 | 11.4% | 12.8% | 113 |
| 1 | 5.6% | 14.7% | 127 | 6.1% | 14.5% | 138 | 4.7% | 12.0% | 107 |
| NONE | 2.8% | 8.0% | 69 | 4.5% | 11.4% | 109 | 3.6% | 10.0% | 89 |

Older segment prefers “short quick vacations” but indicates more nights away than younger demos. Both are small segments so likely limited overlap or contradiction of data.

# Domestic Travel

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| DOM TRAV-WHERE STAYED OVRNIGHT-LAST TRP: | Vertical | Horizontal | Index2 | Vertical | Horizontal | Index3 | Vertical | Horizontal | Index4 |
| HOTEL/MOTEL/SIMILAR PAID ACCOMMODATION | 36.6% | 13.8% | 119 | 40.3% | 13.8% | 131 | 36.3% | 13.3% | 118 |
| FRIENDS & RELATIVES | 22.9% | 13.7% | 118 | 17.2% | 9.3% | 89 | 25.2% | 14.6% | 130 |
| OTHER PLACE | 7.9% | 15.9% | 137 | 4.7% | 8.6% | 82 | 8.4% | 16.4% | 146 |
| PUBLIC OR PRIVATE CAMPGROUND | *2.4% | *16.7% | *144 | *1.5% | *9.5% | *90 | 1.7% | 11.6% | 103 |
| ALL-INCLUSIVE RESORT | *2.1% | *10.0% | *86 | 3.6% | 15.2% | 145 | 2.7% | 12.4% | 111 |
| DOM TRAVEL - AMOUNT SPENT - LAST TRIP: | Vertical | Horizontal | Index2 | Vertical2 | Horizontal | Index3 | Vertical | Horizontal | Index4 |
| $1000 OR MORE | 17.2% | 11.7% | 100 | 21.1% | 12.9% | 123 | 23.5% | 15.4% | 137 |
| $500 - $999 | 17.8% | 15.8% | 136 | 15.4% | 12.4% | 118 | 16.0% | 13.7% | 122 |
| $300 - $499 | 14.0% | 14.3% | 123 | 12.7% | 11.7% | 111 | 11.8% | 11.6% | 103 |
| LESS THAN $300 | 19.3% | 14.1% | 121 | 15.2% | 10.0% | 95 | 18.9% | 13.3% | 119 |

Largest percentage of each demo stay in hotels.

# Vacation Activities

| | A25-39 | | | A40-54 | | | A55-74 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index | Vertical % | Horizontal % | Index |
| SIGHTSEEING | 66.1% | 13.9% | 120 | 61.9% | 11.8% | 112 | 62.7% | 12.8% | 114 |
| GO TO THE BEACH | 58.2% | 15.3% | 132 | 52.1% | 12.4% | 118 | 44.5% | 11.3% | 101 |
| SHOPPING | 48.2% | 14.7% | 127 | 43.8% | 12.1% | 115 | 40.6% | 12.0% | 106 |
| OTHER OUTDOOR ACTIVITIES | 44.8% | 17.7% | 153 | 34.0% | 12.2% | 116 | 24.1% | 9.2% | 82 |
| FINE DINING | 40.8% | 15.2% | 131 | 32.7% | 11.0% | 105 | 35.9% | 12.9% | 115 |
| ATTEND A SPECIFIC EVENT | 35.5% | 17.1% | 148 | 24.7% | 10.8% | 103 | 24.6% | 11.5% | 102 |
| CAMPING/ HIKING | 34.2% | 18.3% | 158 | 25.7% | 12.5% | 119 | 16.1% | 8.3% | 74 |
| OTHER NON-OUTDOOR ACTIVITIES | 24.4% | 18.9% | 163 | 16.9% | 11.8% | 113 | 11.1% | 8.3% | 74 |
| FISHING | 15.5% | 14.7% | 127 | 15.2% | 13.0% | 124 | 11.7% | 10.7% | 95 |
| BOATING | 14.8% | 15.7% | 135 | 12.4% | 11.9% | 113 | 10.1% | 10.4% | 92 |
| WATER SPORTS | 14.7% | 16.2% | 140 | 11.9% | 11.9% | 113 | 6.7% | 7.2% | 64 |
| GAMBLING | 14.6% | 13.8% | 119 | 14.3% | 12.2% | 116 | 16.0% | 14.7% | 131 |
| VISIT A SPA | 13.2% | 16.6% | 143 | 8.9% | 10.1% | 97 | 6.7% | 8.2% | 73 |
| SNOW SKIING/ SNOW BOARDING | 10.1% | 20.8% | 179 | 4.5% | 8.3% | 79 | 2.2% | 4.4% | 39 |
| PLAYING GOLF | 6.9% | 13.7% | 118 | 6.8% | 12.4% | 118 | 8.7% | 16.8% | 150 |
| TENNIS | *2.4% | *17.9% | *154 | *1.4% | *9.1% | *87 | *1.5% | *10.3% | *92 |

In general, declining interest with age. Older segment sticks to traditional activities.

# Thank you.

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