Background

The findings and recommendations in this presentation are the product of research conducted on behalf of The Wild Center in 2015.

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What this project is all about

Our objective has been to learn more about:
- Current Millennial perceptions of the Adirondacks
- Millennial regional travel behavior
- Key themes and trends that will help us develop an overarching story for the region

We are using the unique opportunity we've been granted to gain this understanding by sharing our findings and strategic recommendations with constituents throughout the region.

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Methodology

Immersion

Stakeholder interviews and meetings

Meetings and interviews with local Millennials

Desk research on the region

Qualitative research

2 focus groups in Albany

2 focus groups in NYC

Respondents aged 22-34

Probed unaided an aided perceptions of regional travel and the Adirondacks

Hypothesis development

Survey creation

Creation of key themes emerging from focus groups and immersion phase

Quantitative testing

Survey of Millennials across key regions of New York State:
- Upstate and NYC
- More than 1,000 respondents

Methodology

Immersion

Qualitative research

Hypothesis development

Quantitative testing

→ A new story that connects the Adirondacks to Millennials through shared truths

The challenge: Millennials aren't coming and we don't know why

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By the numbers

- Born 1981 to 2000

- 80 million in the US

- 2.4 B globally

- ½ of the workforce by 2020

- 40% larger than X'ers and
  50% larger than Boomers

Source: US Census Bureau; United Nations Population Information Network

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There's love for nature and the outdoors

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It's complicated

23% I strongly agree that I am an "outdoors person"

38% I travel regionally more for sporting and outdoor activities

62% I travel regionally more for leisure and cultural activities

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We have other challenges, some known and some not

Distance and transportation options

They don't know where to start planning

Social pressure to choosing a location

General lack of awareness of everything the region has to offer

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Millennials are seeking variety

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The real challenge: we're competing for share of experiences

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One destination among many

"In the past 3 years, I've been to…"

35% Adirondacks

32% Catskills

32% Poconos

45% Hudson Valley

31% Finger Lakes

33% Vermont

25% Cape Cod

23% Maine

28% New Hampshire

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And they're considering everything

"I'd like to go to…"

%	Place		%	Place
49%	Adirondacks		54%	Vermont
45%	Catskills		53%	Cape Cod
44%	Poconos		52%	Maine
46%	Hudson Valley		47%	New Hampshire
45%	Finger Lakes			

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The connection to the outdoors is strong

60% Have been camping in the past year

33% Have done winter sports in the past year

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But the connection to non-sporting activities is even stronger

"I'm interested in…"

78% ▸ Visiting cultural sites

64% ▸ Food, wine and breweries

66% ▸ Farmer's markets

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The weird thing is…

"Traveling regionally, I prefer to…"

60% — Have adventures or find unexpected experiences

33% — Relax and recharge

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Adventure means a lot of things to Millennials

76% Getting into local culture, history or attractions

65% Learning a new skill, like a sporting activity

60% Trying out a new hobby, making something, learning something out of the ordinary

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The proximity factor

Unwilling to travel more than 4 hours away for regional trip

41%

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The travel / time equation isn't just about distance

Drive 1-2 hours → stay 0 nights

Drive 3-4 hours → stay 1-2 nights

Drive 5-6 hours → stay 2-3 nights

Drive 7+ hours → stay 4-5 nights

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The travel / time equation is important because...

"If you're going for more than a day or two you need lots of different activities. What if it rains? What if you get bored? You can't just hike."
- Male, Albany

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How they travel regionally…

54% Design my own trip and make detailed plans what to do there

36% Get to the location and make it up as I go along

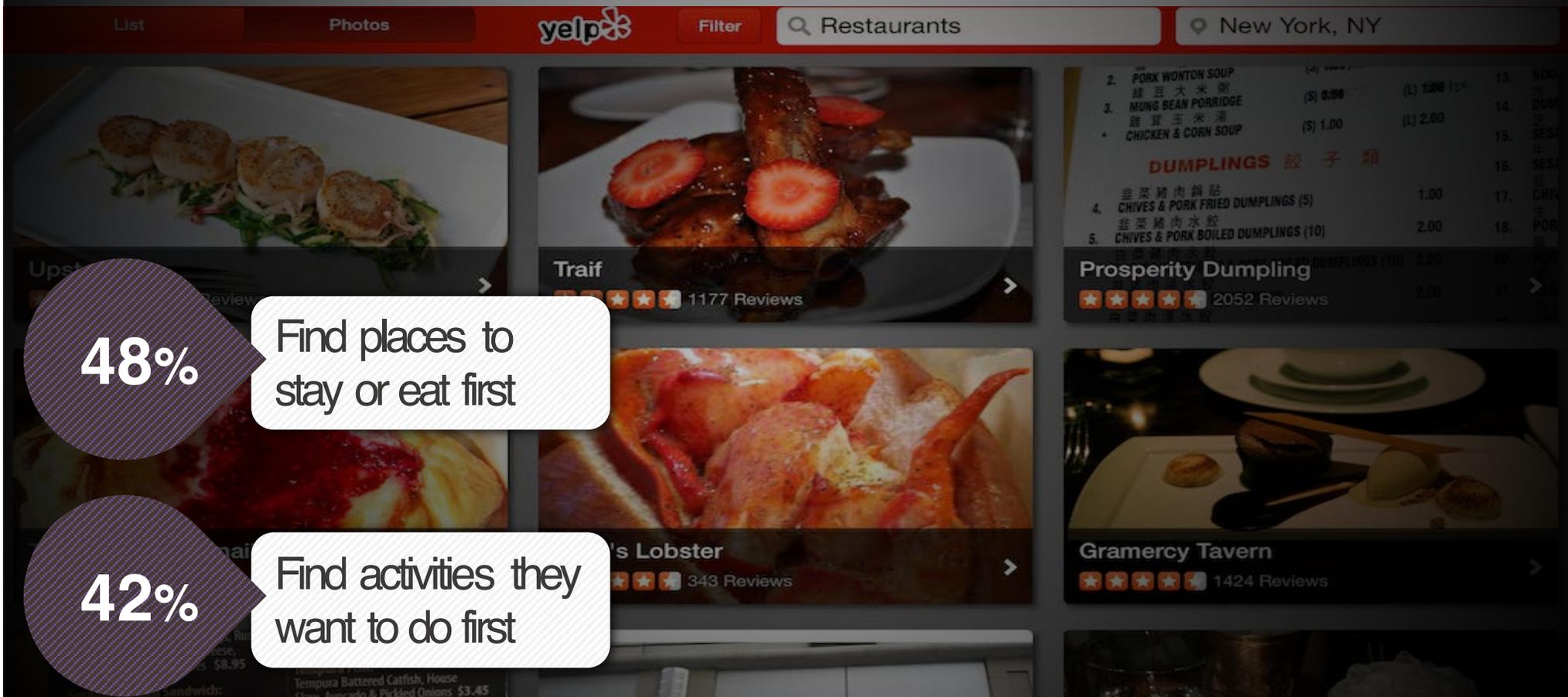**9%** Pre-packaged trip that maps everything out for me

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Issues for the detailed planners

"I don't know where to start" planning an Adirondacks trip

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The Millennial trip-planning mismatch

48% Find places to stay or eat first

42% Find activities they want to do first

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Issues for the improvisers

60%

I like to travel to places where I don't always know what will happen next

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Where they get regional travel inspiration

Social / Web

86% Word of mouth

82% Web sites / blogs

68% Social media posts

Mass Media

64% Print media

60% Video

46% Ads / sponsored content

Curators

47% Emails

46% Group buying sites (e.g., Groupon)

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Who's influencing regional travel decisions?

44%

I'm the one who suggests ideas for regional travel destination most often

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Why do influencers try to influence?

64% Suggesting a regional travel destination makes me feel like I'm in the know compared to others

69% I like to be the first to try new regional travel destinations

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Social pressure affects why they don't choose us

44% I feel like I need to persuade people to go along with my regional travel ideas

12% It would be hard to get others to come with me

10% My friends haven't been

10% I haven't seen anything online or in social media

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How do they persuade their friends?

Social evidence

86% Word of mouth

82% Social media posts

Content

64% Read good things about it

46% It has good reviews

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It's not just friends they travel with

25% Friends

26% Significant other

42% Family

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Surprise, Millennials are parents

86% Of children born today are born to Millennial moms

37% Of our survey respondents are parents

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A different kind of social pressure: kids

89% I want my kids to be flexible and not to have to make too many special changes

85% I plan regional trips around what my children want and need

87% Amenities for kids are important

OCTOBER 26, 2015

TIME

Help! My Parents Are Millennials

How this generation is changing the way we raise kids

BY KATY STEINMETZ

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They have high hopes for the impact of regional travel on their kids

94% I want my kids to learn how to be in nature

90% I want my kids to learn new skills

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Millennial regional travel: Implications

We're one destination among many → need to differentiate (which is what this project is about)

Outdoor activities aren't the key for most Millennials → elevate our more complete offering

The further away from the park, the more variety travelers need → to reiterate, elevate our more complete offering

Most travel regionally for adventure, but leisure, culture and food are part of their definition → update our definition of adventure and promote it

Millennials don't know where to start planning to visit us → we need to draw the horse to water more with specific ideas

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Millennial regional travel: Implications

They choose lodging or food over activities when they start planning → we need to elevate those in our communications and planning tools

They improvise digitally → we need workarounds for our lack of cell coverage

Inspiration comes to them, and it comes from social and web → we need to work on our organic social footprint

There are strong social implications for choosing the location → we need to help reduce the sense of risk for them to suggest us by providing more social- and content-based evidence

More than a third of our target are parents → we need to consider enhancing the experience for younger kids

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The Backdrop of Technology

Technology is how they plan and execute travel

Browse travel sites and blogs

72% 🖥️ 55% 📱

Book travel

75% 🖥️ 47% 📱

See ads about travel

63% 🖥️ 54% 📱

Use apps for travel ideas

n/a 🖥️ 67% 📱

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When there are a lot of reviews…

72% — I can draw my own conclusions about a destination

72% — It means lots of people have been there

69% — It's reassuring
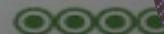
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But the catch with reviews is...

58% Sometimes I want to explore places that are off the beaten path and don't have a lot of reviews

29% A place with lots of reviews is less likely to be unique or authentic

"It's like I want to find a place with 500 reviews that nobody has been to!"

- Female, Albany

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There's a generational trap at work

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We can't fall for the trap

When I'm at a regional destination, I use digital...

93% — For maps and navigation

88% — To find cultural activities

87% — To find the next place to eat

87% — To get ideas for activities

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Here's what they use them for

77% Find activities in the area

64% How to get there

74% Ideas for things to do

50% The ability to plan a trip

65% Ideas on places to stay

36% Links to reviews and social posts

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Millennials and technology: Implications

Digital isn't a medium → approach mobile, social, content, advertising and booking with a united front

Reviews are a huge draw, but sometimes they are the enemy of "unique" → we need more reviews and we need to emphasize that some of the experiences we offer don't have any—and that's a good thing

The stereotype is about selfies → Millennials use technology for everything at the destination, and we need to offer more ways for them to plan in real-time

Destination web sites are important → but we don't have broad permission to elevate some of the social stuff that moves the needle—we have to think about how we get in their organic digital bubble

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The Experience Generation

The importance of experiences

86% Experiences are more important than possessions

76% The experiences I have define who I am

53% I try to have experiences that will give me things to post on social media

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Travel experiences are some of their best

87% — Travel experiences are some of the most important experiences to me

87% — Having <u>unique</u> travel experiences is important to me

87% — Having <u>authentic</u> travel experiences is important to me

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What makes a travel experience authentic?

69% Local culture, flavor and traditions

50% Not too commercial

40% Not "tourist-y"

40% Spirt of "how things used to be"

37% Takes work to uncover the gems

29% Most people don't know about it

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"Unique" and "authentic" might be further afield

I have to travel farther to find unique, authentic experiences

55%

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Accommodations are still key for a third

33%

The very first thing I would do when planning a regional trip would be finding a place to stay

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Millennials are picky but open about accommodations

It's important that a destination has...

61% Exactly the type of place I want to stay

67% A variety of types of places to stay

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The ideal place to stay is all over the map

21% A large hotel or resort with lots of amenities

19% An inn or B&B with local charm

12% An AirBNB or other home rental

12% A budget or family-friendly motel

10% Small boutique hotel / motel

8% A rustic cabin

8% Camping in the wild

8% Camping with amenities

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Food is even more important than lodging

82% The quality of food on a regional trip is important to me

15% Finding places to eat is the first thing I do when planning a trip

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The Experience Generation: Implications

Experiences, and specifically travel experiences, are how they define themselves →
we need to get into the experience business, not the travel or tourism business

Learning, the undiscovered, and off-the-beaten path are how they gauge "unique" →
we need to elevate those without leaning entirely on nature and sporting activities

Local culture and traditions are how they gauge "authenticity" → are we doing
enough to connect Millennial visitors to these?

Accommodations are key, more than half are willing to rent from residents →
developing a stronger AirBNB base may be a stop-gap while we develop

Food is extremely important → and we're definitely not known for it; we need to
elevate and invest in developing more equity here

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What They Think About The Adirondacks

More of them are visiting than you may have thought

86% I've heard of the Adirondacks

52% I've been to the Adirondacks (Upstate residents)

16% I've been to the Adirondacks (NYC area residents)

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Why wouldn't people come?

Awareness

17% Don't know enough about it

16% Don't know where to start planning a trip

7% No activities I'm interested in

Social pressure

12% Hard to persuade others

10% Friends haven't been

10% Haven't seen anything online or in social media

Things we can't help

13% Too far

7% Too wild, remote and uncivilized

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What Millennials know about us

87% The ability to get deep into nature

86% A huge variety of outdoor activities

86% A place to get away and unplug

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What Millennials don't know about us

66% Opportunities to learn new skills and make things

59% Craft breweries and local wine

57% Unusual and even quirky experiences

45% An emerging food scene

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Cultural institutions are relevant if they update their definition of culture

The following would make me more likely to visit the Wild Center:

82% Live animal encounters

81% Sampling of local food and beer

77% Guided walks and canoe trips

76% Maple syrup-making class

71% Instructors to teach activities

72% After-hours parties and concerts

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What they think of us: Implications

More Millennials may be visiting us than we think → part of the issue may be getting them to experience more than a single thing while they're with us

If they've been here they're more likely to come back → we need them to leave with more ideas of what to do here—marketing on-site to them better

Millennials are 50% likelier to be aware of our outdoors activities than the ones that matter more to them → yet again, we need to elevate learning, food and drink, and the unique and even quirky experiences we have to offer

They expect more from cultural institutions → we have permission to offer the things they're looking for: e.g., learning and broader local culture

Is it possible for a destination to do this?

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The impact of the unexpected

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Dreaming big is the theme of their story

CALIFORNIA

Fuel Your Dreams

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The downside of not having a story
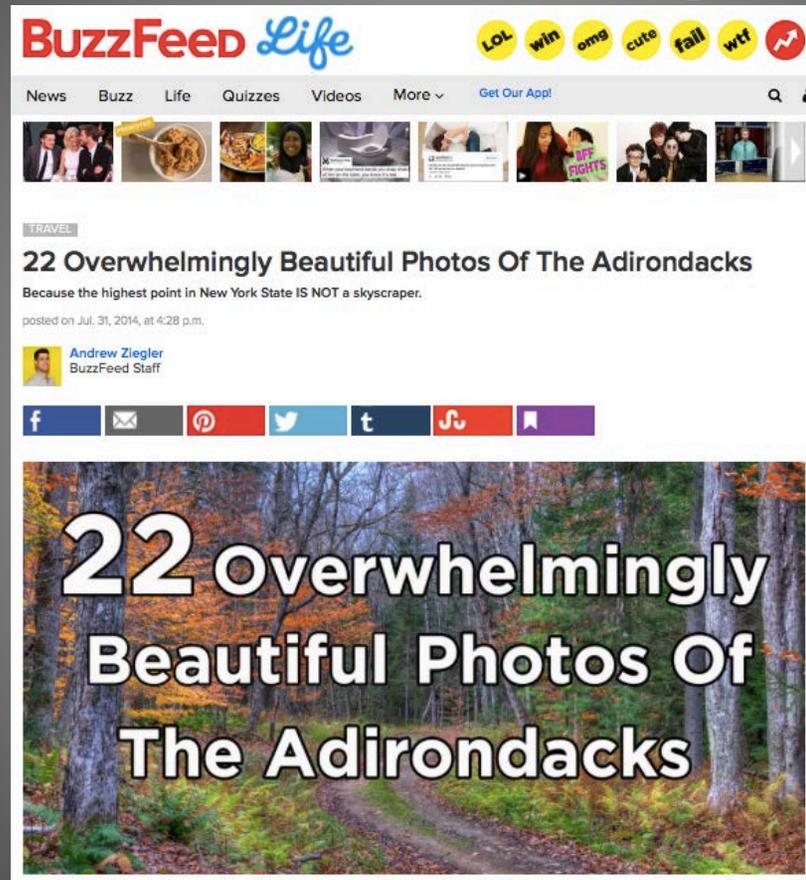
We can go further together

"At the 1894 Constitutional Convention, a new covenant to achieve meaningful protection of the Forest Preserve was included in the new Constitution. Henceforth, the Adirondack Forest Preserve would be '**forever wild**.'"

(apa.ny.gov)

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The Adirondack Gene

Millennials are on a journey:
- The trip
- Self-development
- Life

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The Adirondack Gene

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Millennials seek a rewarding life:
- Experiences above all
- Stories to tell
- Learning

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The Adirondack Gene

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Choosing "unique" and "authentic" takes courage:
- Independent thinking
- Challenging oneself

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The Adirondack Gene

Millennials are on a journey:
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Choosing "unique" and "authentic" takes courage.
- Independent thinking
- Challenging oneself

Deep down they yearn to explore:
- Adventure
- Culture
- The undiscovered

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It's starting

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And we can all tell the story

- Every implication in this presentation has a potential next step

- No matter what our roles, budgets, or ways of communicating are, we can all help tell the story Millennials will hear using whatever tools we do have by sticking to these principles:

Journey→ the trip, self development, life
Rewards→ unique experiences, stories, learning
Choose→ think for and challenge oneself take the road less traveled
Unbeaten→ adventure, culture, the undiscovered
Paths→ forever wild, but not without paths to choose from

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