



Connecting Millennials To The Adirondacks

January 5, 2016

Background

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

For more information, contact:

Hillarie Logan-Dechene, Director of Philanthropy
hlogan-dechene@wildcenter.org
518-359-7800, ext. 103

Stephanie Radcliffe, Executive Director
sratcliffe@wildcenter.org
518-359-7800, ext. 104

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 and 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

A photograph of four Adirondack chairs arranged on a dark patio at night. From left to right, there are two yellow chairs, one orange chair, and one blue chair. Each chair has a matching small round table in front of it. In the background, there is a building with large windows and some other outdoor furniture like a blue bench and a metal table. The scene is dimly lit, with some light reflecting off the wet-looking surfaces of the chairs.

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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[illegible]

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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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A photograph of a dirt path winding through a dense forest. The path is covered in reddish-brown pine needles and leaves. The trees are tall and thin, with green foliage. The text "Millennials And Regional Travel" is overlaid in white, bold, sans-serif font in the center of the image.

Millennials And Regional Travel

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...”

49% Adirondacks

45% Catskills

44% Poconos

46% Hudson Valley

45% Finger Lakes

54% Vermont

53% Cape Cod

52% Maine

47% New Hampshire

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The connection to the outdoors is strong

The background of the entire slide is a photograph of a forest. In the center, a person is suspended on a ropes course, holding onto a rope with both hands. Another person is visible in the upper left background, also on the ropes course. The forest is dense with tall trees and green foliage.

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%

5 h 22 min
303 miles

5 h 29 min
308 miles

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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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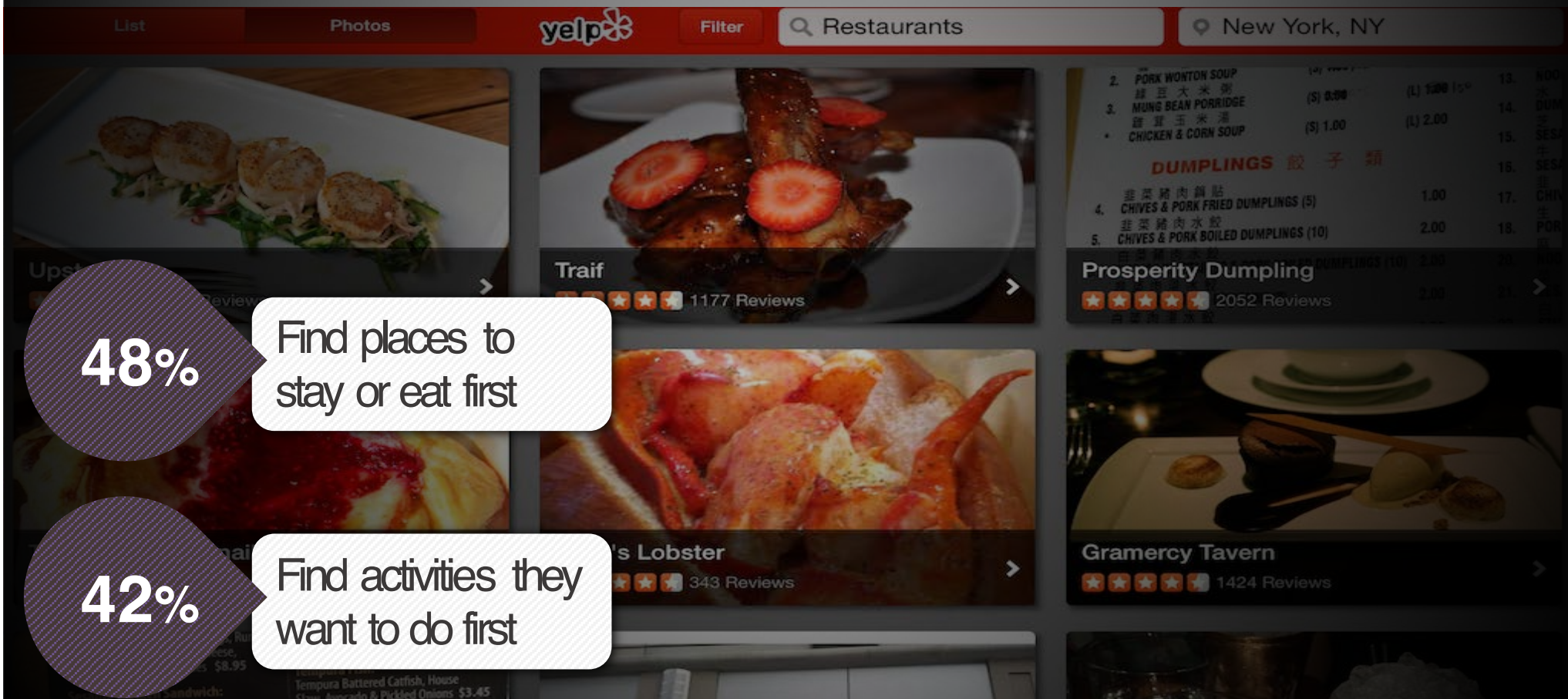
Issues for the detailed planners

**“I don’t know where
to start” planning
an Adirondacks trip**



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The Millennial trip-planning mismatch



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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)

Inspiration comes to them...



57%

Regional travel ideas just come to me, I don't have to actively seek them out

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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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But there's social pressure...

70%

Being the one to choose
a location puts pressure
on me to get it right

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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



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A photograph of four children playing in a garden. A girl in a red shirt is in the center, leaning over a pile of soil. To her left, a boy in a red and grey shirt is also looking down. To her right, a boy in a blue plaid shirt is looking up. On the far right, an adult's hands are visible, holding a small amount of soil. The background is a blurred garden scene.

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

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

A photograph of a dirt path winding through a dense forest. The path is covered in reddish-brown pine needles and leaves. The trees are tall and thin, with green foliage. The lighting is soft, creating a serene atmosphere. The text "The Backdrop of Technology" is overlaid in the center in a white, bold, sans-serif font.

The Backdrop of Technology

Our Millennial target is connected and social

98%

Own a
smartphone

90%



72%



62%



45%



31%



21%



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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...

Romantic

Shaheen's Motel



126 Reviews

#1 of 7 in Tupper Lake



"Great Family owned Motel"

BeachFan711 November 14, 2015

Vacation Rental

PAY ON TRIPADVISOR

The Healing Wood Sanctuary at Indian Carry

from \$300/night

Family

Pine Tree



#2 of 7 in Tupper Lake



"Just what we were looking..."

Julie H September 25, 2015

Best Value

Lakeview



#4 of 7 in Tupper Lake

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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They do use destinations' "official" sites or apps

82%

Before I'm at the destination

69%

While I'm at the destination

The Adirondacks of Northern New York

From glittering sunrise to alpenglow sunset – experience one of the most action-packed winters on the
fields and wooded trails are second homes to cross-country skiers and snowshoers
of skill or experience, you can become the skier or rider

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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

A photograph of a dirt path winding through a dense forest. The path is covered in reddish-brown pine needles and leaves. The trees are tall and thin, with lush green foliage. The lighting is soft, filtering through the canopy. The text "The Experience Generation" is overlaid in the center in a white, bold, sans-serif font.

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 unique travel experiences is important to me

87%

Having authentic travel experiences is important to me

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What makes a travel experience unique?

74% I learn something new

35% Not crowded

54% Things that feel undiscovered

22% Few people have done it

40% Off the beaten path

20% Nobody I know has done it

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What makes a travel experience authentic?

69% Local culture, flavor and traditions

40% Spirit of “how things used to be”

50% Not too commercial

37% Takes work to uncover the gems

40% Not “tourist-y”

29% Most people don't know about it

“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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The sharing generation

58%

I would consider using AirBNB
or another home rental service

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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

A photograph of a dirt path winding through a dense forest. The path is covered in reddish-brown pine needles and leaves. The surrounding trees and foliage are lush green, with sunlight filtering through the canopy. The text "What They Think About The Adirondacks" is overlaid in white, bold, sans-serif font in the center of the image.

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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And they're very open to us
(if they've heard of us)

I plan to go to the
Adirondacks in the future

89%

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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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On a side note, “State Park” is very confusing in our case

“[I assume it will be] poorly done, that's what first comes to mind. Generic.”

“I picture like picnic tables and nothing.”

“I think the state park has nothing, I picture an empty park.”

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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

A photograph of a forest path. The path is covered in reddish-brown pine needles and leads into a dense forest of tall trees with green foliage. The text "The Adirondack Gene" is overlaid in white, bold, sans-serif font in the center of the image.

The Adirondack Gene

Is it possible for a
destination to do this?



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The impact of the unexpected

COM PLEX STYLE

Bob Burnquist and His Designers Build and Test Out a Sick Floating Skate Ramp on Lake Tahoe

BY ANDREW LASANE
Andrew LaSane is a freelance writer from South Carolina who currently resides in Broo...

MAR 14, 2014

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waters of California's deepest lake
Bob Burnquist invited to try it for size
je of the ramp's grand debut

YouTube

Bob Burnquist's Floating Skate Ramp in Lake Tahoe

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**Dreaming big is the
theme of their story**

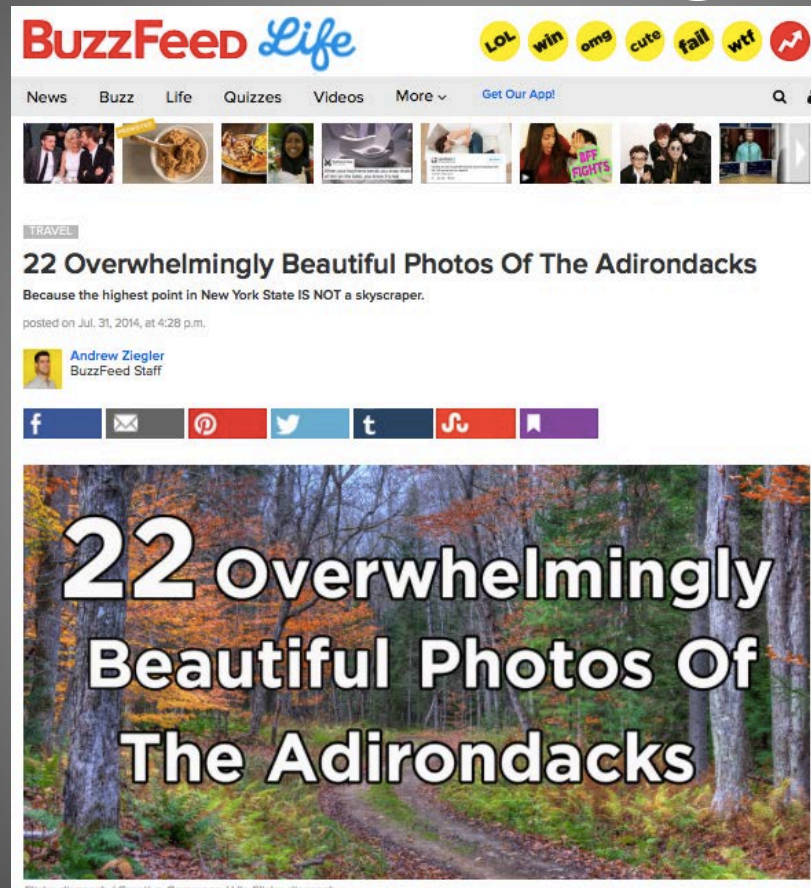
CALIFORNIA

Fuel Your Dreams

SCROLL TO DISCOVER


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The downside of not having a story



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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

Millennials are on a journey:

- The trip
- Self-development
- Life

Millennials seek a rewarding life:

- Experiences above all
- Stories to tell
- Learning

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The Adirondack Gene

Millennials are on a journey:

- The trip
- Self-development
- Life

Millennials seek a rewarding life:

- Experiences above all
- Stories to tell
- Learning

Choosing “unique” and
“authentic” takes courage:

- Independent thinking
- Challenging oneself

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The Adirondack Gene

Millennials are on a journey:

- The trip
- Self-development
- Life

Choosing “unique” and
“authentic” takes courage:

- Independent thinking
- Challenging oneself

Millennials seek a rewarding life:

- Experiences above all
- Stories to tell
- Learning

Deep down they yearn to explore:

- Adventure
- Culture
- The undiscovered

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The theme of the story

Millennials are on a **journey**

They seek a **rewarding** life

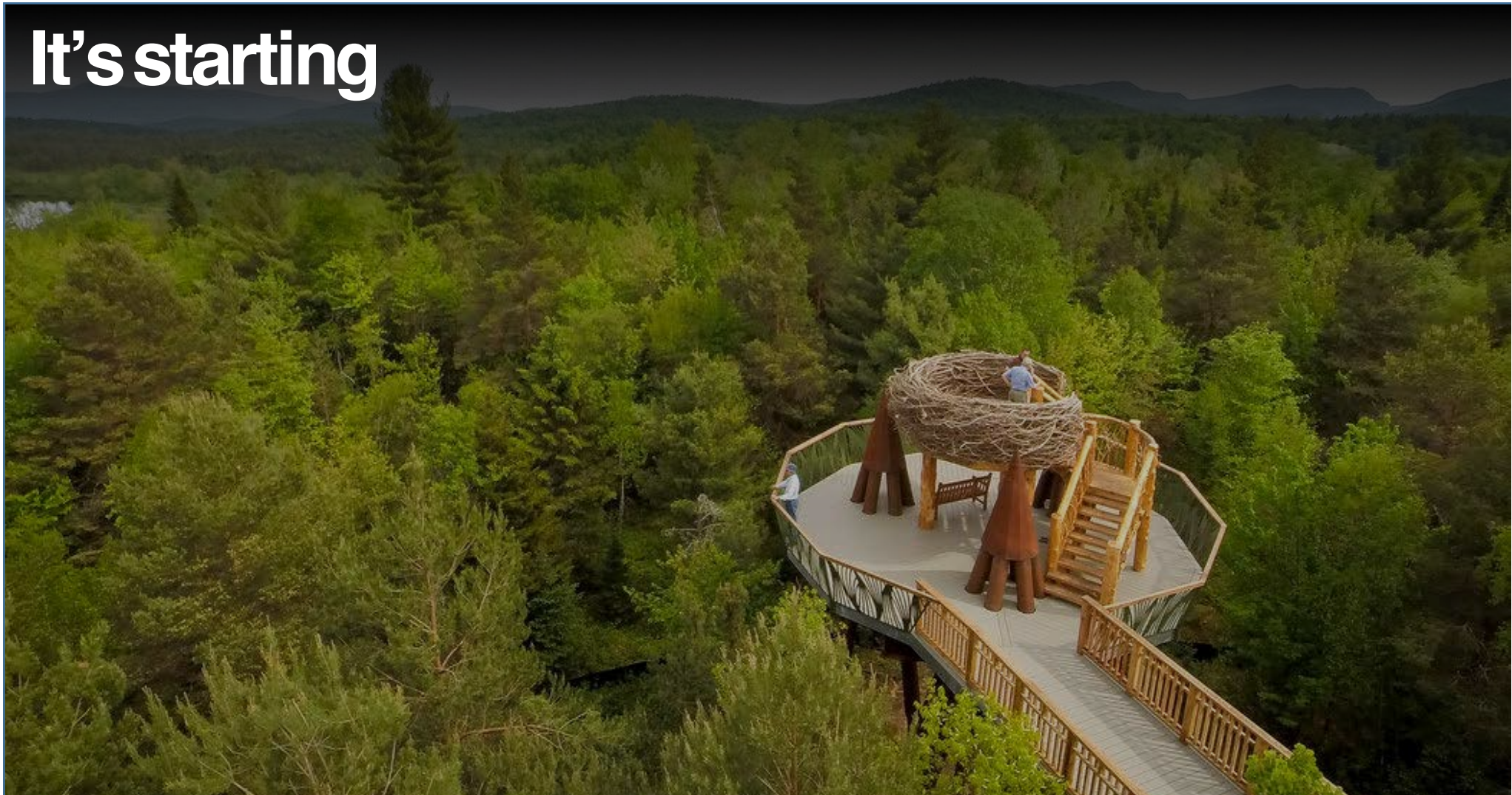
**The journey rewards
those who choose unbeaten paths**

Choosing “unique” and
“authentic” takes courage

Deep down they yearn to
explore

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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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A photograph of a dirt path winding through a dense forest with vibrant green foliage. A dark grey rectangular box is overlaid in the upper center, containing the logo for 'THE WILD CENTER'. The logo features the word 'THE' in small white capital letters above 'WILD' in large white capital letters, with a blue exclamation mark as the dot of the 'i'. Below 'WILD' is the word 'CENTER' in smaller white capital letters.

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thank you