

The African American Traveler

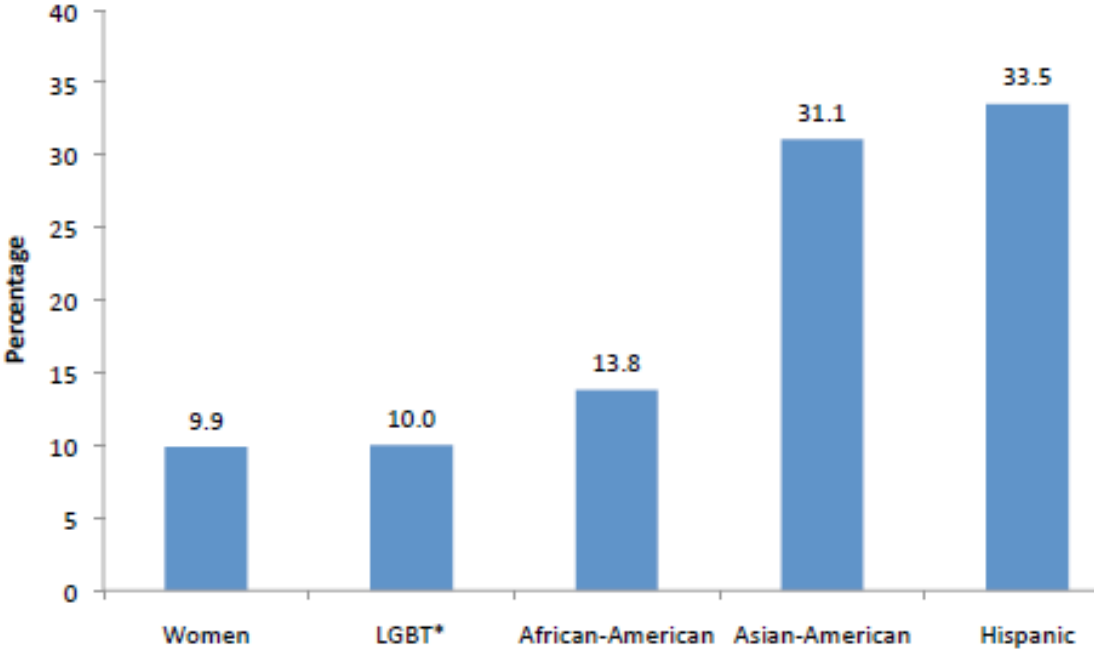
2018 Edition



Multicultural Markets by the Numbers



Projected Population Growth of the Five Markets
(% change 2020/2010)



*Assumes same growth rate as U.S. population
Source: U.S. Bureau of the Census

The Dimensions of Multicultural Tourism

118.3 million U.S.
General market Travelers
visit cultural assets

59 million
International
Travelers

**For the Destination/
Travel Company:
Multicultural
Assets**

- **Build Community**
 - **Crear jobs**
- **Engender Pride**

Based on U.S. Adult Population = 225 Million

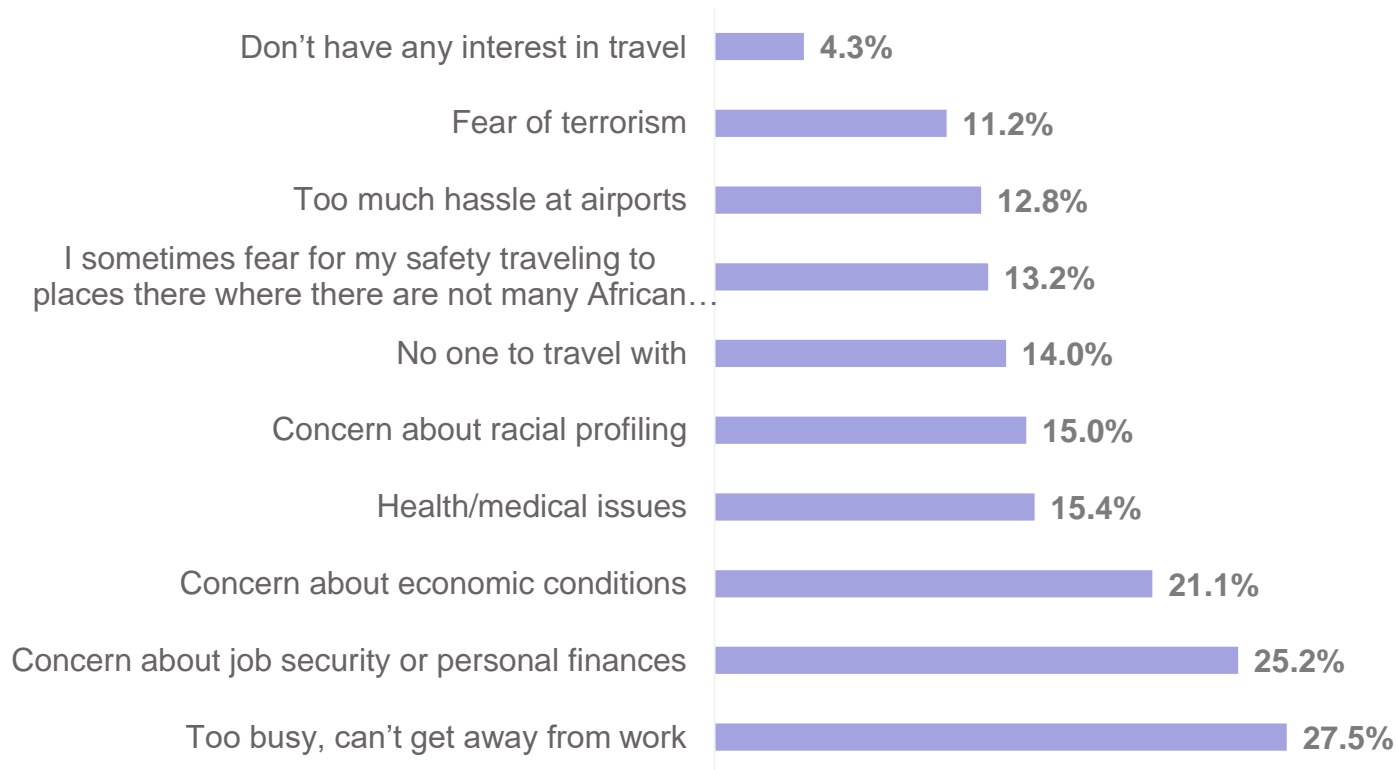
African-American Market: Growth from \$48 to \$63 Billion

Total Spending Including Shopping	Total African-American Market (2011)	Total African-American Market (2018)
Sample Size	1,018	1,747
Average Amount Total Spend	\$ 1,144	\$1,435
Median # Leisure Trips	2	3
Population* (in Millions)	42.2	43.6
Median Household Size	2	3
Estimated Economic Impact: (in Billions)	\$48.3	\$62.6

Source: U.S. Census Note: Formula (Average Total Spend * Median Leisure Trips * Estimated Population) / Median Household Size = Estimated Economic Impact (in Billions); Total Spend, Leisure Trips and Population Estimates Rounded. Total Spend including shopping

Barriers to Future Travel

Factors Impacting Leisure Trips



- Concern over racial profiling concern is a greater concern for travelers than hassle at airports.
- Millennials are most concerned about racial profiling.

Curious & Engaged (C&E): Activities

- This group enjoys local arts and culture generally as well as those activities related specifically to African-American topics.
- It is clear that when this group travels, they are more actively seeking out cultural activities and things to do than other groups.
- The Curious & Engaged Audience is also more likely to be engaged in:
 - Cultural Activities
 - Historical Pursuits
 - Shopping
 - Nightlife
 - Outdoor Activities
 - Gambling

Activities	C&E N=214	All Others N=1,533
Total Base		
Festival (music, art, etc.)	66%^	20%
Local / Regional Cuisine	59%^	48%
Night Life	57%^	29%
Historic Sites	57%^	12%
Live music concert / event	55%^	15%
Shop-Mall	55%^	39%
Shop-Outlet Mall	53%^	32%
Art / Design Museum	50%^	8%
Beaches	49%^	28%
Shop-Downtown	49%^	25%
Natural History / Science Museum	46%^	7%
African-American Focused Museum	39%^	4%
Theater / Performing Arts	38%^	10%
Casino	37%^	19%
National Parks	36%^	10%
State / Local Parks	32%^	14%
Spa Services	32%^	12%
Local Farmers Market	31%^	9%
Shop-Local Art / Crafts	31%^	9%
African-American Focused Event	29%^	3%
Zoo	28%^	9%
Aquarium	26%^	9%
Theme / Amusement Parks	24%^	12%
Shop-Airport	21%^	7%
Outdoor Sports / Activities	20%^	13%
Gourmet Dining	20%^	8%

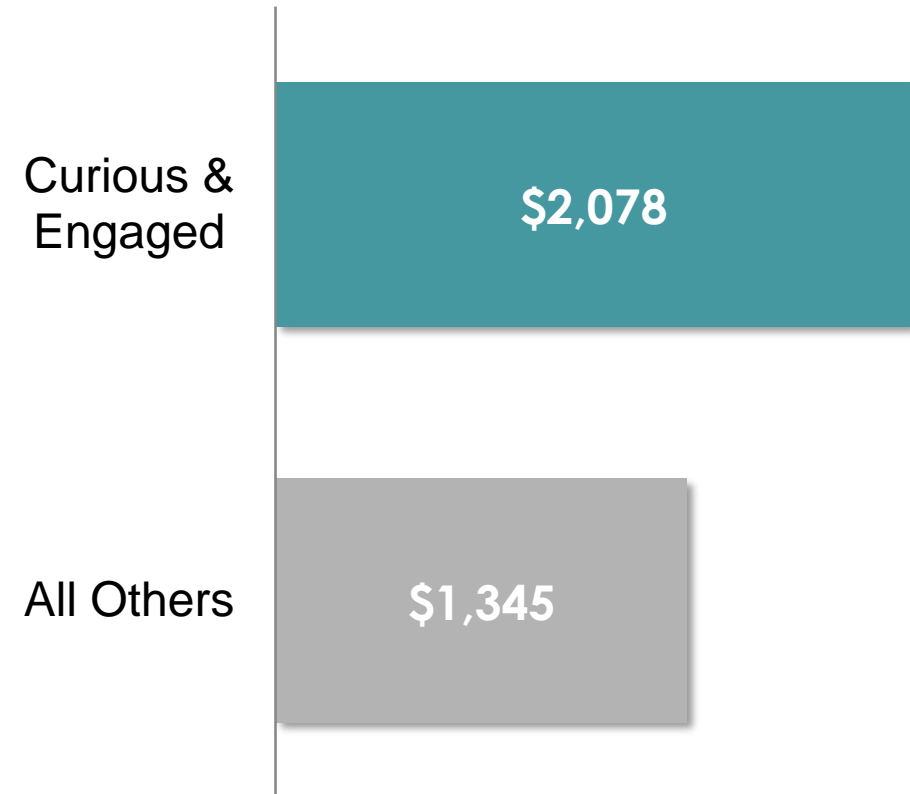
^ indicates significantly higher at a 95% confidence level

Curious & Engaged (C&E): Spend

Spend by Category
Mean by Category

		Curious & Engaged N=214	All Others N=1,533
	Transportation (to/from destination & at destination)	\$596 [^]	\$404
	Lodging	\$467 [^]	\$320
	Food & Beverage	\$267 [^]	\$195
	Entertainment	\$227 [^]	\$135
	Shopping	\$431 [^]	\$246
	Other	\$91	\$45

Total Average Amount Spent
Most Recent Trip



[^] indicates significantly higher at a 95% confidence level

Family Reunion (FR): Activities

- Family Reunion Travelers enjoy a variety of activities – both fun things they can do with their family and children (shopping, eating out, going to the beach), as well as more adult activities such as night life and festivals.
- Family Reunion Travelers are not quite as active on their vacations as the Curious & Engaged segment is, possibly because they are spending time with family at a relative's home – the purpose of their journey(s) is/are to see family, rather than pursue unique activities.



Activities	FR N=385	All Others N=1,362
Total Base		
Shop-Mall	50%^	38%
Local / Regional Cuisine	49%	49%
Shop-Outlet Mall	41%^	32%
Night Life	40%^	31%
Festival (music, art, etc.)	38%^	22%
Beaches	36%^	29%
Shop-Downtown	33%^	27%
Casino	29%^	19%
Live music concert / event	27%^	18%
Spa Services	24%^	12%
Historic Sites	22%^	16%
National Parks	20%^	11%
State / Local Parks	20%^	15%
Outdoor Sports / Activities	20%^	12%
Art / Design Museum	19%^	12%
Zoo	18%^	9%
Theme / Amusement Parks	18%^	12%
Local Farmers Market	18%^	10%
Theater / Performing Arts	17%^	12%
Natural History / Science Museum	17%^	10%
Aquarium	17%^	10%
African-American Focused Museum	14%^	6%
Shop-Local Art / Crafts	13%	11%
Shop-Airport	12%^	7%
Gourmet Dining	11%	9%
Winery / Brewery Tours / Tastings	11%^	6%

^ indicates significantly higher at a 95% confidence level

Family Reunion (FR): Spend

Spend by Category

Mean by Category

		Family Reunion N=385	All Others N=1,362
	Transportation (to/from destination & at destination)	\$567[^]	\$388
	Lodging	\$364	\$330
	Food & Beverage	\$204	\$204
	Entertainment	\$191[^]	\$134
	Shopping	\$388	\$235
	Other	\$55	\$50

Total Average Amount Spent

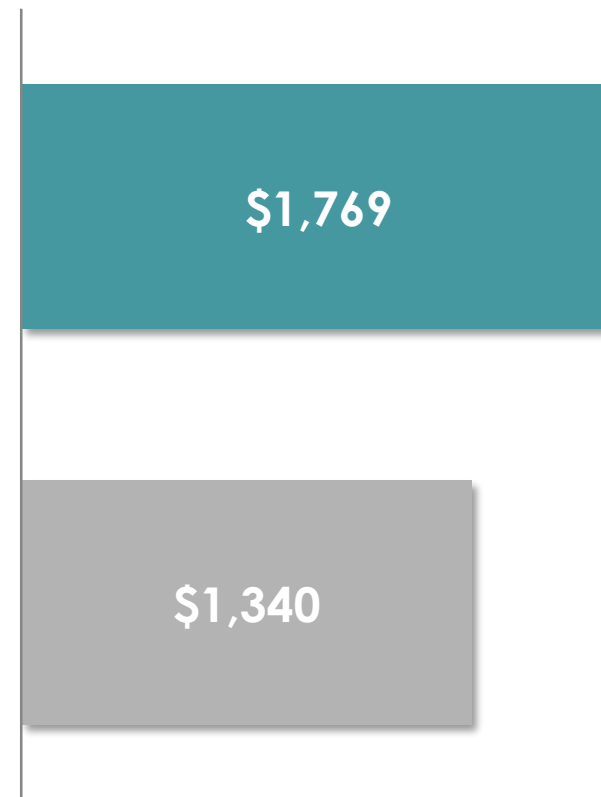
Most Recent Trip

Family Reunion

\$1,769

All Others

\$1,340



[^] indicates significantly higher at a 95% confidence level

Business Traveler (BT): Activities







- While Business Travelers aren't necessarily traveling for the purpose of pursuing specific cultural activities, they do take advantage of the local scene on their trips.
- The Business Traveler group seeks out more entertainment-related activities, rather than cultural, culinary, or educational, compared to other groups.
- Business Travelers can be found enjoying:
 - Shopping
 - Nightlife
 - Beaches
 - Festivals
 - Live music

Activities	BT	All Others
Total Base	N=632	N=1,115
Local / Regional Cuisine	51%	48%
Shop-Mall	44%^	39%
Shop-Outlet Mall	38%^	32%
Night Life	38%^	30%
Beaches	36%^	28%
Festival (music, art, etc.)	35%^	20%
Shop-Downtown	31%	27%
Live music concert / event	28%^	16%
Historic Sites	22%^	16%
Spa Services	20%^	12%
Casino	20%	22%
National Parks	19%^	10%
State / Local Parks	19%^	14%
Theater / Performing Arts	18%^	11%
Outdoor Sports / Activities	17%^	11%
Art / Design Museum	17%^	11%
Zoo	16%^	9%
Aquarium	16%^	9%
Local Farmers Market	16%^	10%
Theme / Amusement Parks	15%	13%
Shop-Local Art / Crafts	14%^	10%
Natural History / Science Museum	13%	11%
Shop-Airport	12%^	7%
African-American Focused Museum	11%^	7%
Gourmet Dining	11%^	8%
Winery / Brewery Tours / Tastings	10%^	6%

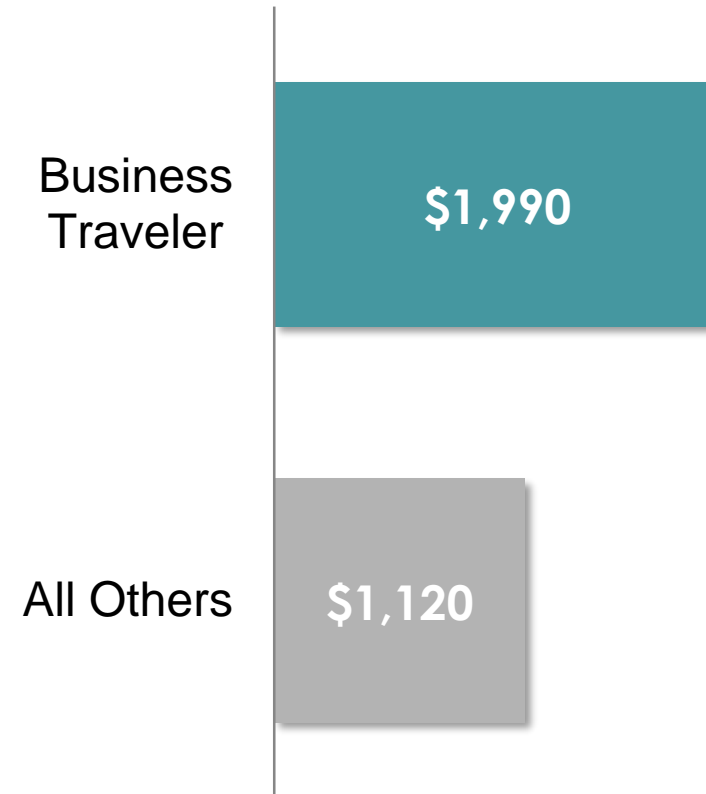
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Business Traveler (BT): Spend

Spend by Category
Mean by Category

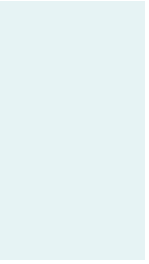
		Business Traveler N=632	All Others N=1,115
	Transportation (to/from destination & at destination)	\$601	\$329
	Lodging	\$459	\$269
	Food & Beverage	\$260	\$172
	Entertainment	\$199	\$116
	Shopping	\$380	\$205
	Other	\$91	\$29

Total Average Amount Spent
Most Recent Trip



^ indicates significantly higher at a 95% confidence level

Cultural and Heritage Travel



Cultural & Heritage Tourism Is Mainstream

118.3 million

Adult Leisure Travelers
take advantage of cultural
& heritage activities when
they travel

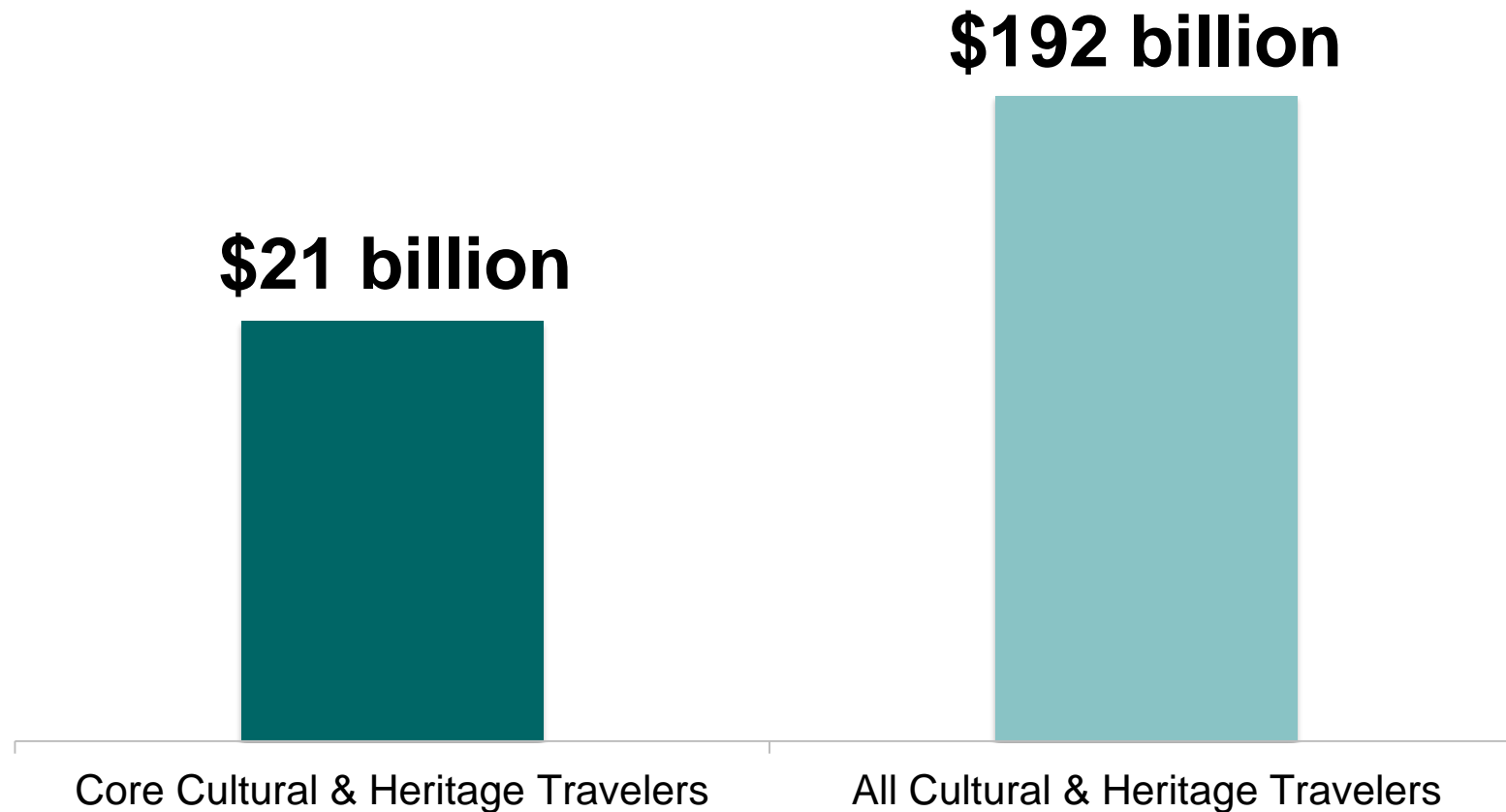


78%
participate in
Cultural &
Heritage Tourism

*Based on U.S. Adult Population = 225 Million

The Value of the Cultural & Heritage Tourism Market

Segmentation helps narrow the target, identifying the best match for your destination or product.

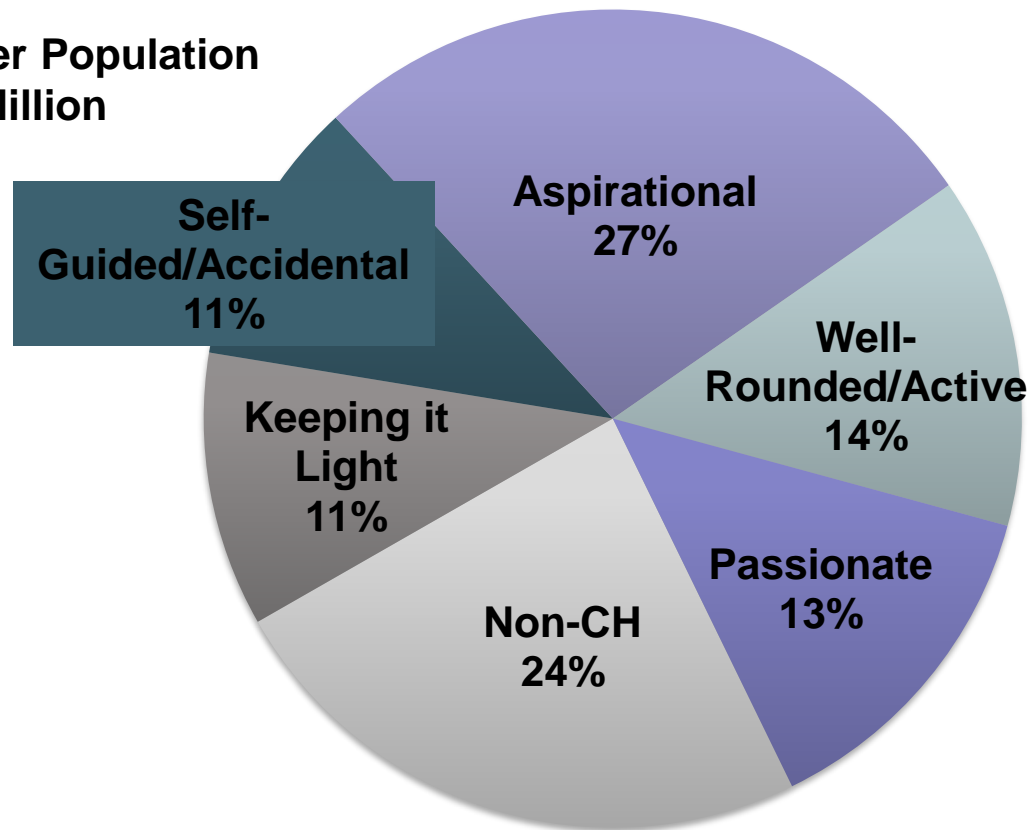


Segmentation of Cultural & Heritage Travelers

130 million leisure travelers participate in cultural/heritage activities (to some extent) while on a leisure trip. These Cultural & Heritage travelers can further be divided into five segments based on the activities they participated in on their most recent trip (or in the past three years), behaviors, and preferences with regards to leisure travel.

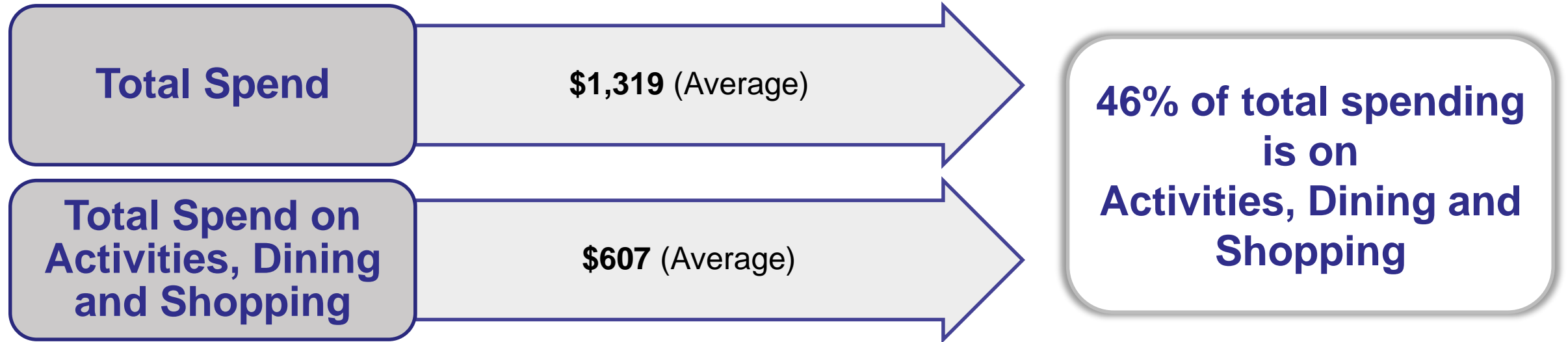
Aspirational Leisure Travelers are MOST likely to participate at some level in cultural or heritage-related activities while on a leisure trip, followed by Passionates and the Well-Rounded/Actives.

Leisure Traveler Population
129.6 Million



Total Trip Spend & Total Spend Activities (Average)

The average trip spending by Cultural & Heritage Travelers.



Non-Cultural & Heritage Travelers:
Total Spend Average: **\$820**
Total Spend Activities, Dining and Shopping: **\$356**
43% of total spending is on Activities, Dining and Shopping.

Q21A. About how much would you say you, personally, spent in total on this most recent trip (including transportation, lodging, entertainment, food & dining expenses, etc.)?

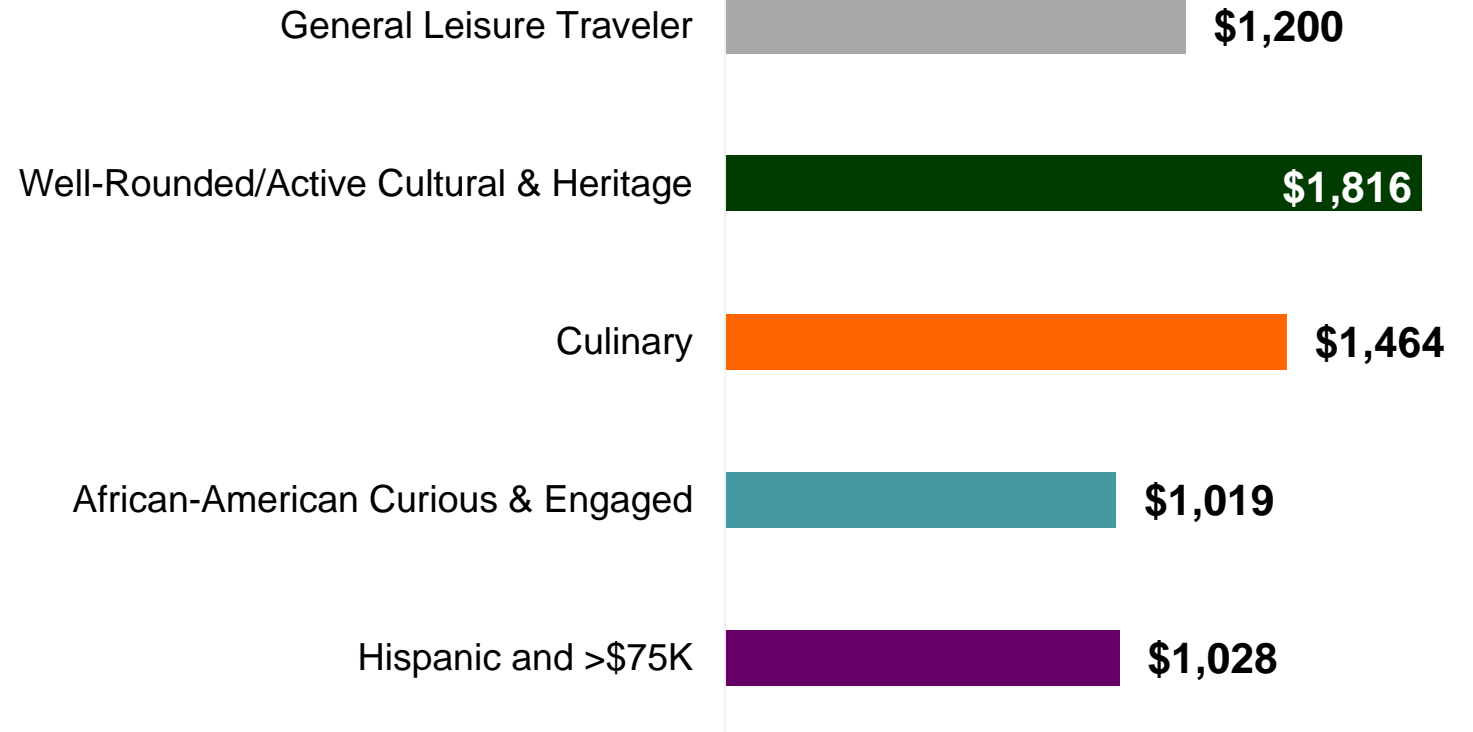
Please include spending on items that you paid for even if they were for other people.

Q21B. How much did you spend on each of the following? Please include spending on activities that you paid for even if they were for other people?

Financial Impact of Cultural & Heritage Travelers



Higher-than-average overnight trip expenditures





Puerto Rico

Post-Maria Destination Attitudinal Study
Quantitative Analysis on the Traveler's
Perception

Wave 2
July 2, 2018

Ratings on Cultural & Heritage Travel assets increased among key audiences from Wave 1 and Wave 2.

Statistically Significant Changes in GAP	Visited W1	Visited W2	Gap Improvement
Total	692	722	
It is a safe and secure place	54%	50%	+4
Clean drinking water	53%	49%	+4
Easy to get around	40%	35%	+5
Fresh food	41%	34%	+7
Is a good value for the money	32%	28%	+4
Access to Internet/Wifi	34%	25%	+9
Pristine, beautiful beaches	30%	22%	+8
Variety of hotels, resorts, bed and breakfasts	28%	19%	+9
Sightseeing: nature and parks	27%	16%	+11
Easily accessible by air transportation	23%	15%	+8
Has an authentic, local dining scene	18%	13%	+5
Sightseeing: historic landmarks and other points of interest	22%	12%	+10
Family-friendly activities	15%	7%	+8
History and cultural attractions	14%	6%	+8
Opportunities to immerse in local culture	9%	5%	+4
Zoos and aquariums	10%	3%	+7
Performing and cultural arts	7%	2%	+5
Outdoor recreation	9%	0%	+9
Top restaurants with celebrity chefs	5%	-2%	+7
Variety of nightlife options (bars, dancing, clubs, etc.)	3%	-3%	+6
A wide variety of shopping venues	8%	-3%	+11
Agritourism	1%	-3%	+4
Has world class resorts	-1%	-4%	+4
Wellness activities like spas, yoga, meditation	3%	-6%	+9
Water sports	-3%	-10%	+7
Extreme adventure activities	0%	-11%	+11
Golf	-9%	-13%	+4
Casino and gambling	-7%	-14%	+7