A photograph of a space shuttle launch at dusk or dawn. The shuttle is ascending vertically, leaving a massive, billowing plume of white smoke and fire. The scene is reflected in a body of water in the foreground. A water tower is visible on the right side of the launch pad. The sky is a deep blue with some light clouds. The text 'SESSION:' is centered over the shuttle's plume.

SESSION:

MARKET TRENDS IMPACTING TRAVEL



VICKI ALLEN

RESEARCH ACCOUNT
MANAGER, DKSHIFFLET



CINDY DECKER

VICE PRESIDENT OF
MARKET STRATEGY, VISIT
HOUSTON



NATE GIERYN

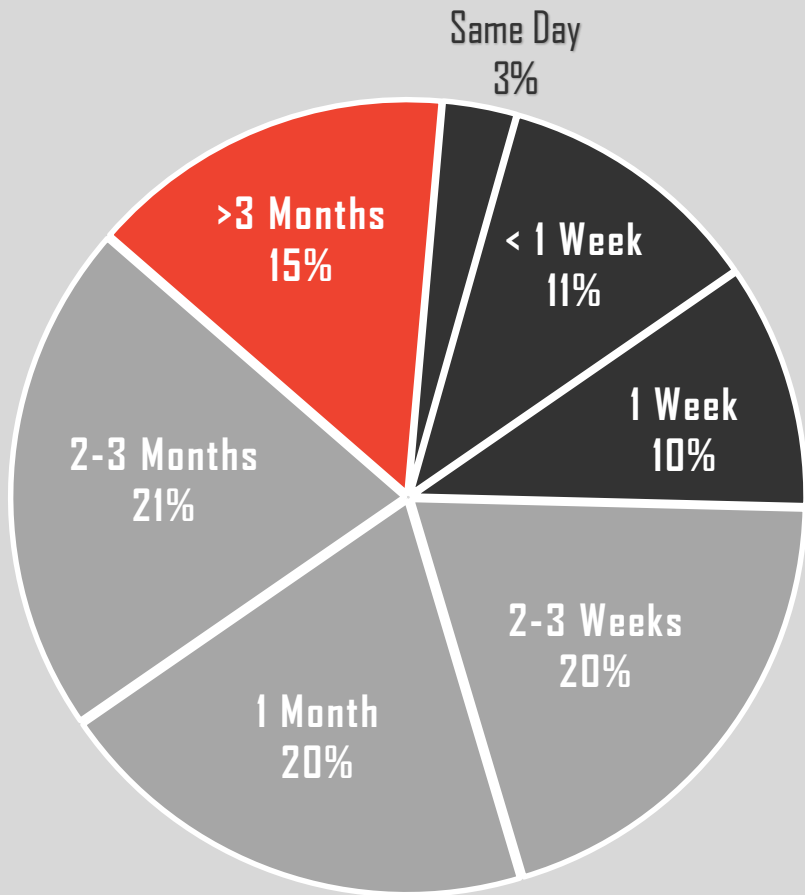
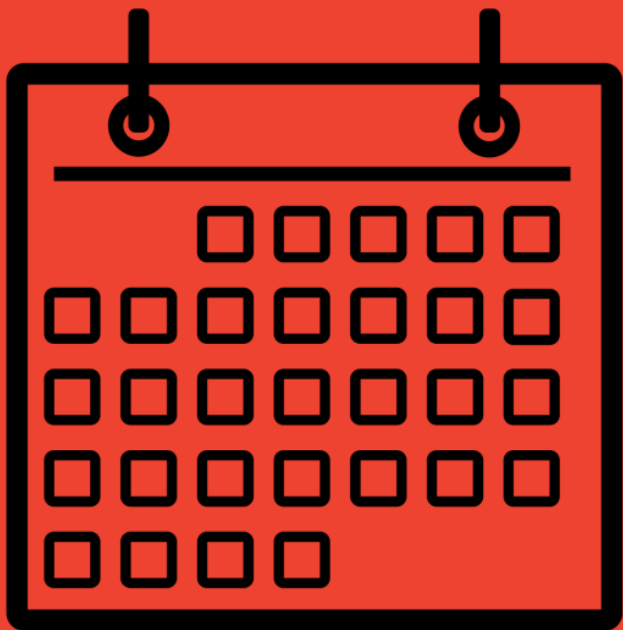
TOURISM RESEARCH
MANAGER, OFFICE OF
THE GOVERNOR

2018 Trends

- Travel volume grew—growth is slowing
- Overnight travel accounts for half of all stays
 - Business accounts for 17%
 - Leisure accounts for 83%

(all the growth is concentrated here)







44%

Leisure = 32%

TRAVEL ALONE



39%

Leisure = 46%

TRAVEL IN PAIRS



5%

Leisure = 6%

LARGE TRAVEL
PARTIES

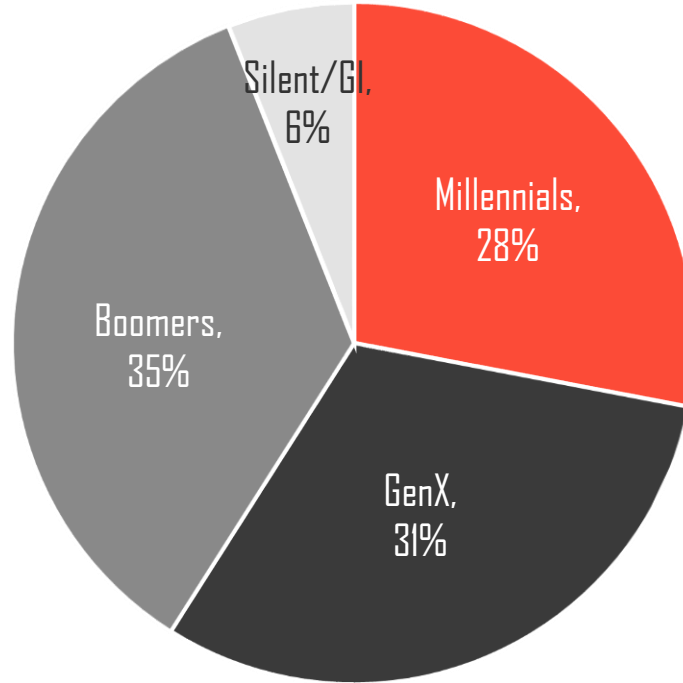


12%

Leisure = 16%

TRAVEL WITH
CHILDREN

GENERATIONS OF U.S. TRAVELERS





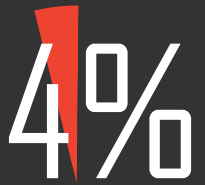
STAY IN HOTELS



STAY WITH FRIENDS/RELATIVES



STAY IN RENTAL HOMES/CONDOS



STAY IN CAMPGROUNDS/LODGES

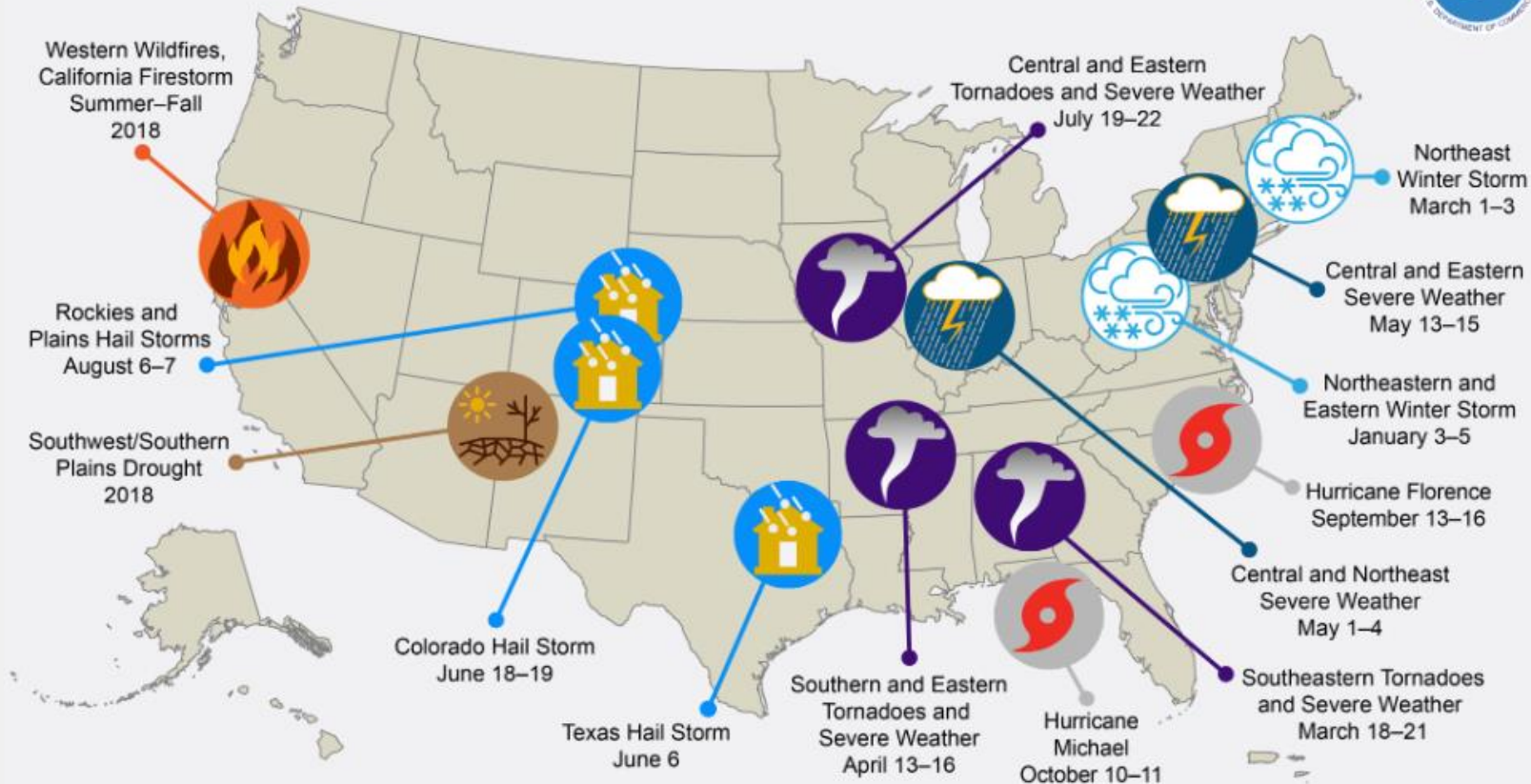


STAY IN OTHER LODGING

Challenges

- Weaponization of travel
- Economy
- Weather related disasters

U.S. 2018 Billion-Dollar Weather and Climate Disasters



This map denotes the approximate location for each of the 14 separate billion-dollar weather and climate disasters that impacted the United States during 2018.

THANK YOU, QUESTIONS

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DKSHIFFLET



TRAVEL TEXAS™



[HOUSTON TOURISM SUMMIT, APRIL 25, 2019]

A cowboy wearing a tan hat, white shirt, and brown vest is riding a light-colored horse. He is herding several longhorn cattle in a wooden corral. The scene is set in a rural, outdoor environment with a clear sky.

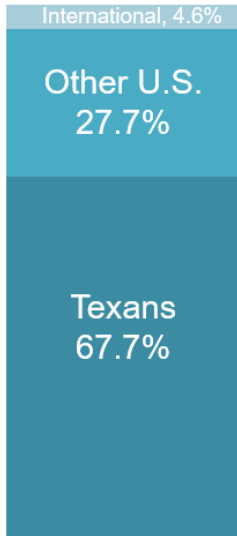
MARKET MIX

ORIGIN, PURPOSE OF TRIP, GENERATIONS



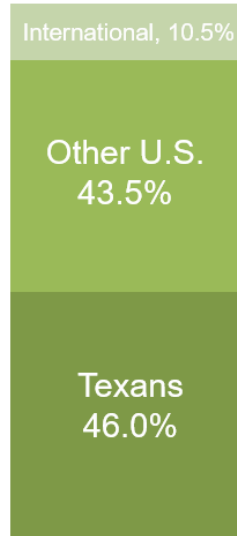
Texas Travel Market Mix

Person-Trips



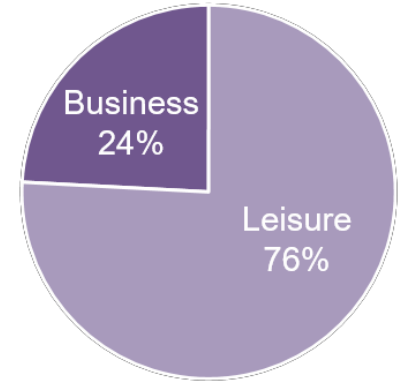
224.3 Million (2018p)
Day and Overnight

Travel Spending



\$64.6 Billion (2017)
Destination Spend Only

Trip Purpose



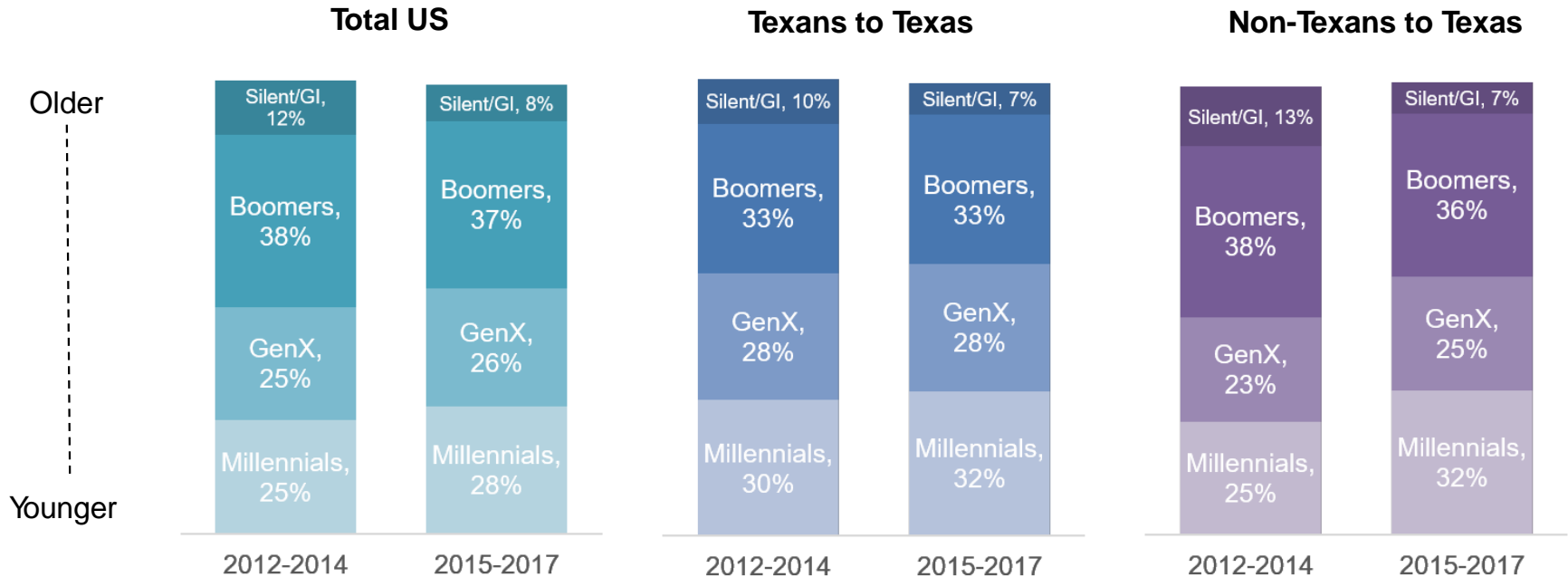
Overnight Domestic Only

Sources: DK Shifflet & Associates, Travel Market Insights, Dean Runyan and Associates





Overnight Domestic Leisure Travelers



Stays based.

Source: DK Shifflet & Associates



A musician wearing a brown hat and a dark t-shirt is performing on a stage at night. He is seen from the back, playing an acoustic guitar. The stage is lit with warm lights, and there are large speakers in front of him. In the background, a large crowd of people is gathered, and a city skyline with several tall buildings is visible under a dark blue sky. A Texas state flag is flying on a pole in the background.

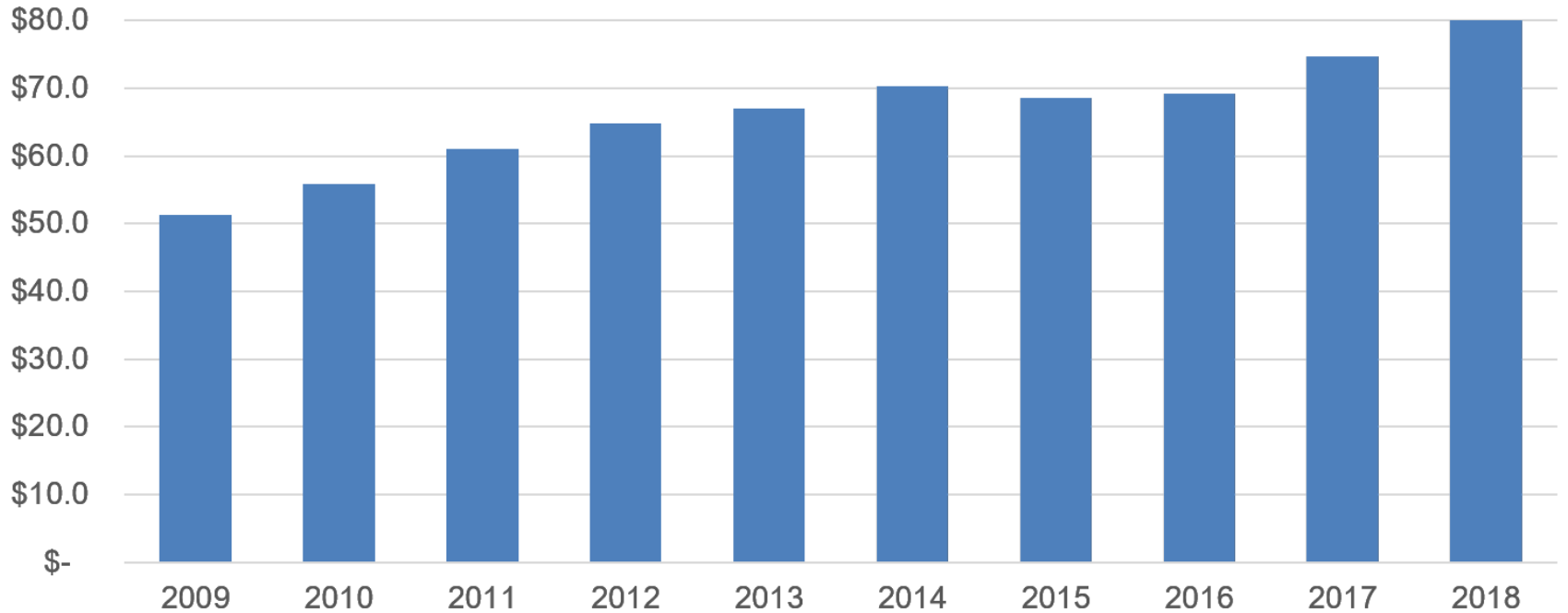
ECONOMIC IMPACT

DIRECT TRAVEL SPENDING, EMPLOYMENT AND EARNINGS

16



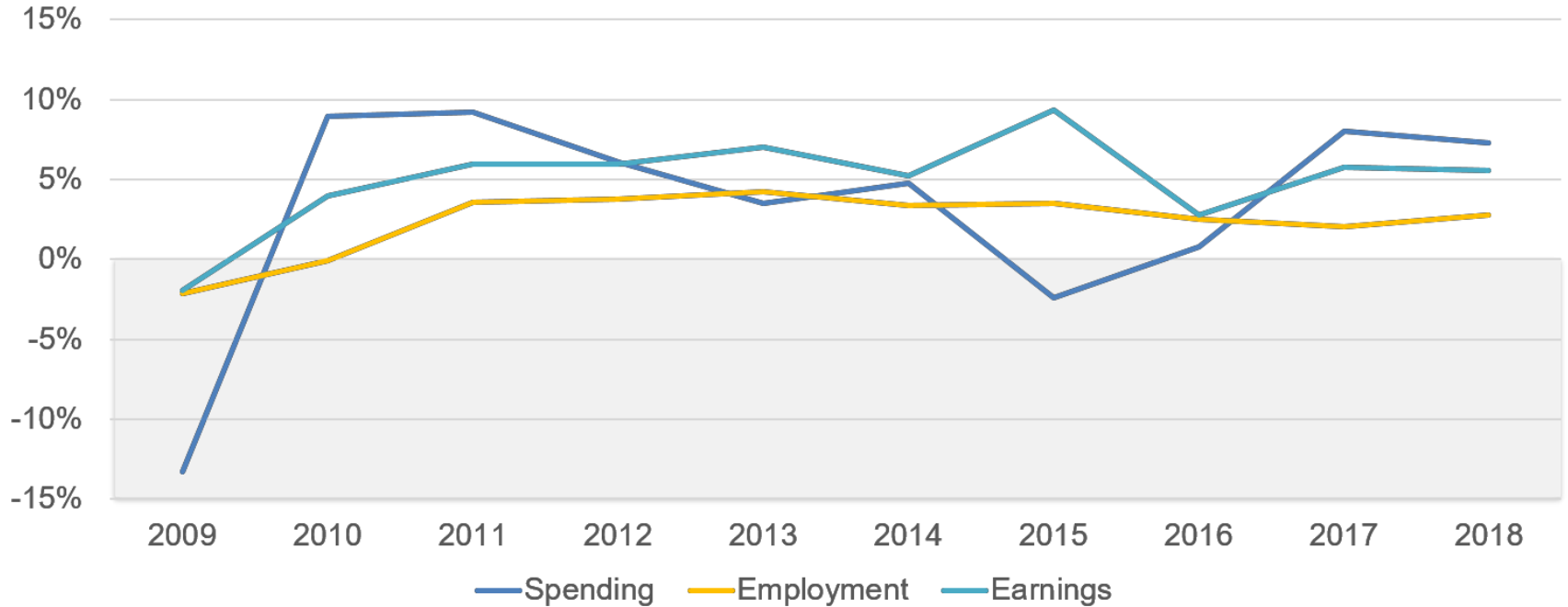
Direct Travel Spending (2009-2018, \$ Billions)



Estimates shown in current dollars, not adjusted for inflation (\$ Billions). Includes spending at destinations, resident air travel, travel arrangement and reservation services, and convention and trade show organizers.

Source: Dean Runyan and Associates.

Spending, Employment and Earnings (2009-2018, %Change)



Annual percentage change. Data points above the shaded area indicate expansion in that year.

Source: Dean Runyan and Associates. Last updated: April 2018



Gulf Coast Tourism Region (2018)



27%

Share of Texas travel spending



27%

Share of Texas hotel inventory



Questions

Nate Gieryn

Tourism Research Manager

nate.gieryn@gov.texas.gov



Houstonfirst[™]

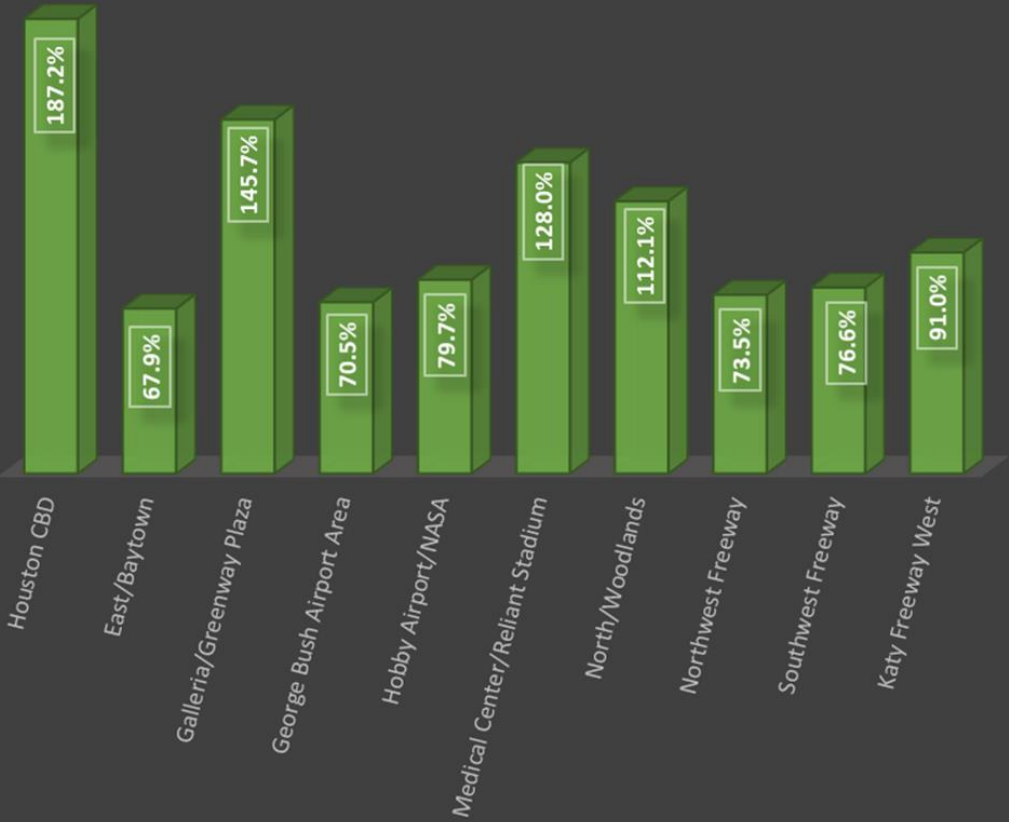
City of Houston Tourism Economic Impact

12.6 Billion Direct
Spend

88.4K Travel
Generated
Employment

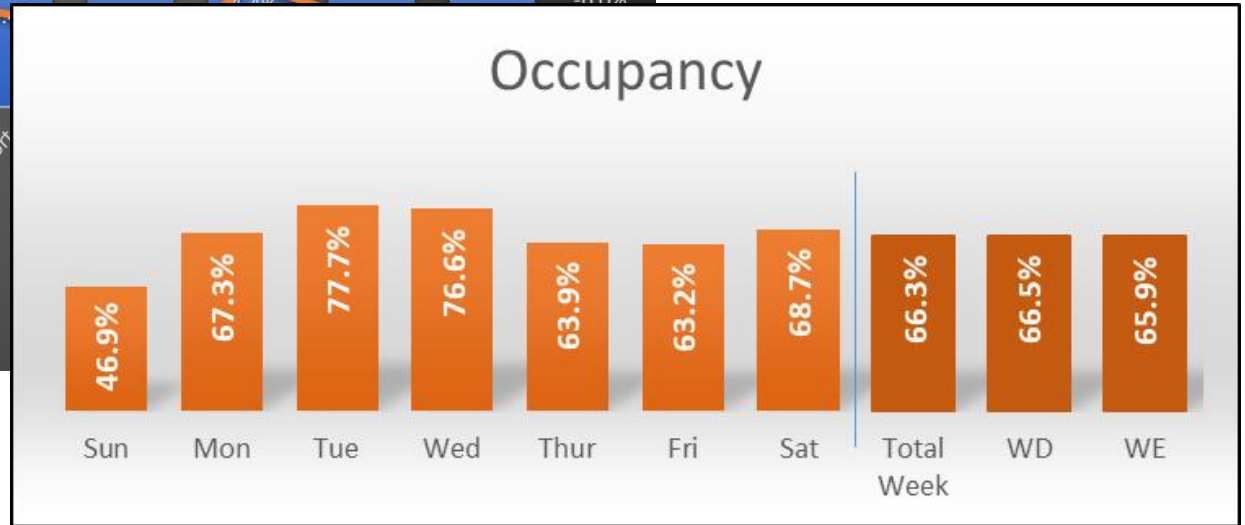
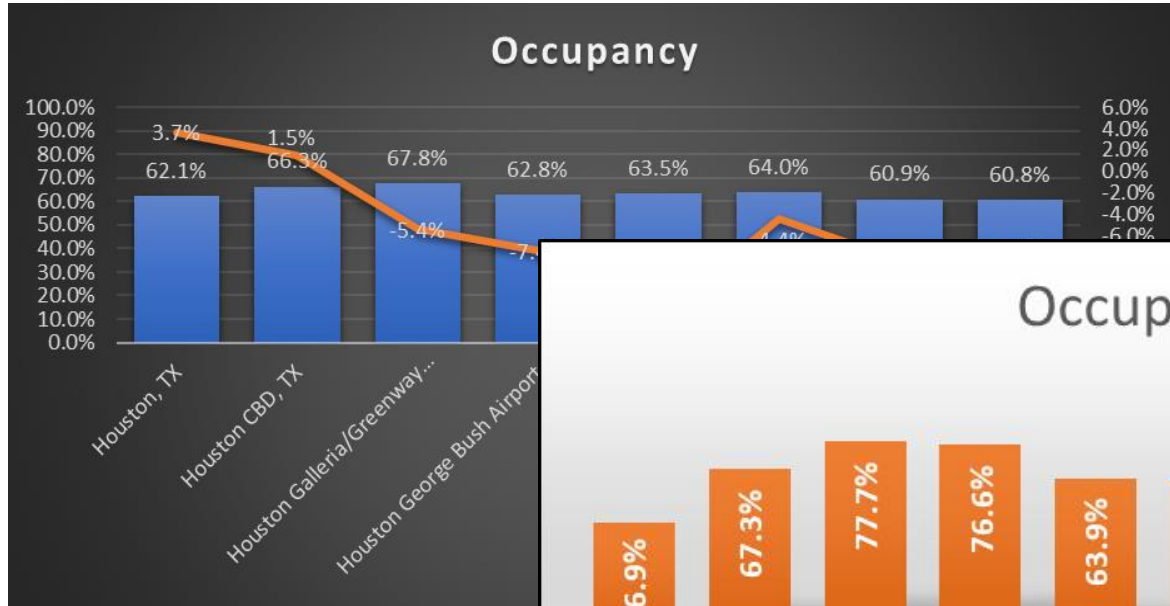
**\$1.2 Billion
Tax Revenue
Generated**

HOUSTON SUB MARKET REVPAR INDEX



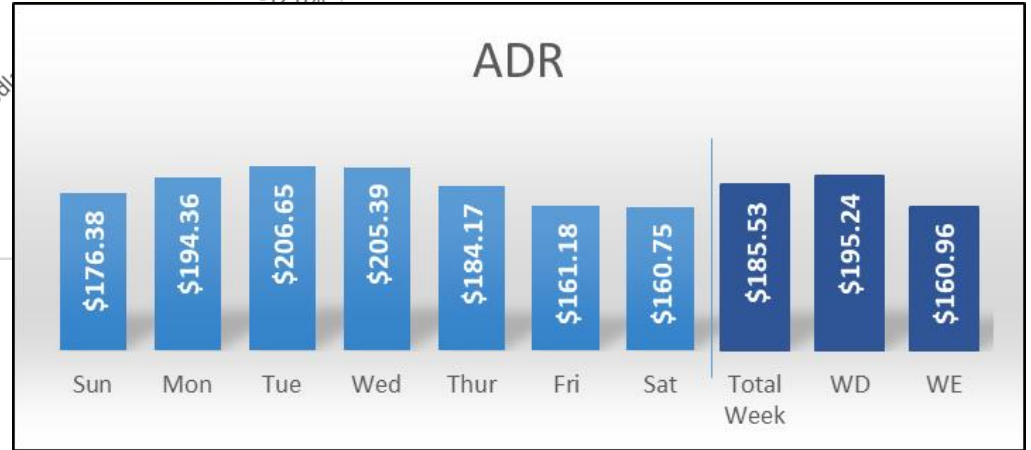
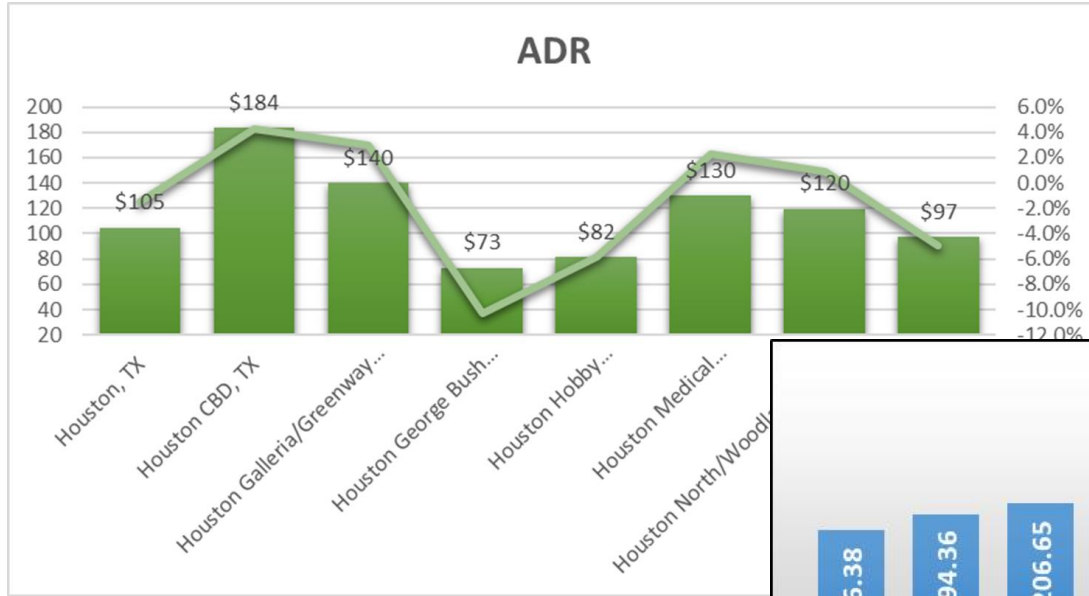
Occ Trends – 12 month rolling Feb 2019

(top 5 markets and 2 airports)

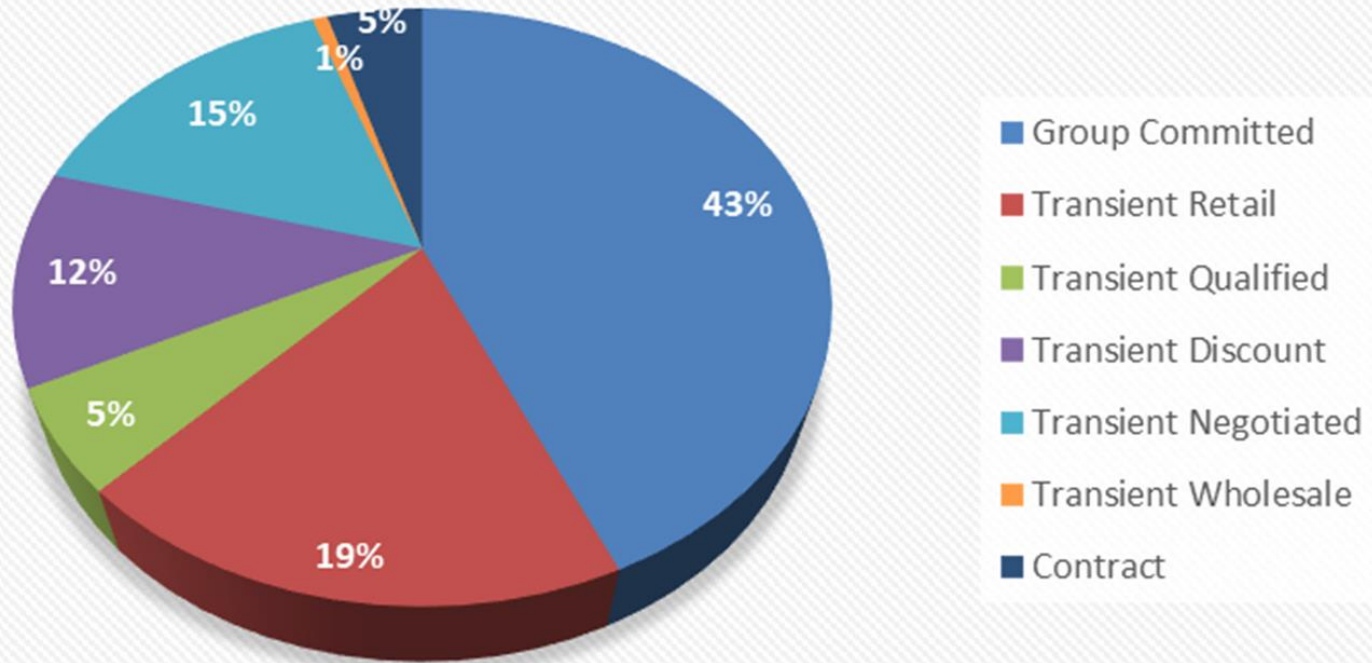


ADR Trends – 12 month rolling Feb 2019

(top 5 markets and 2 airports)

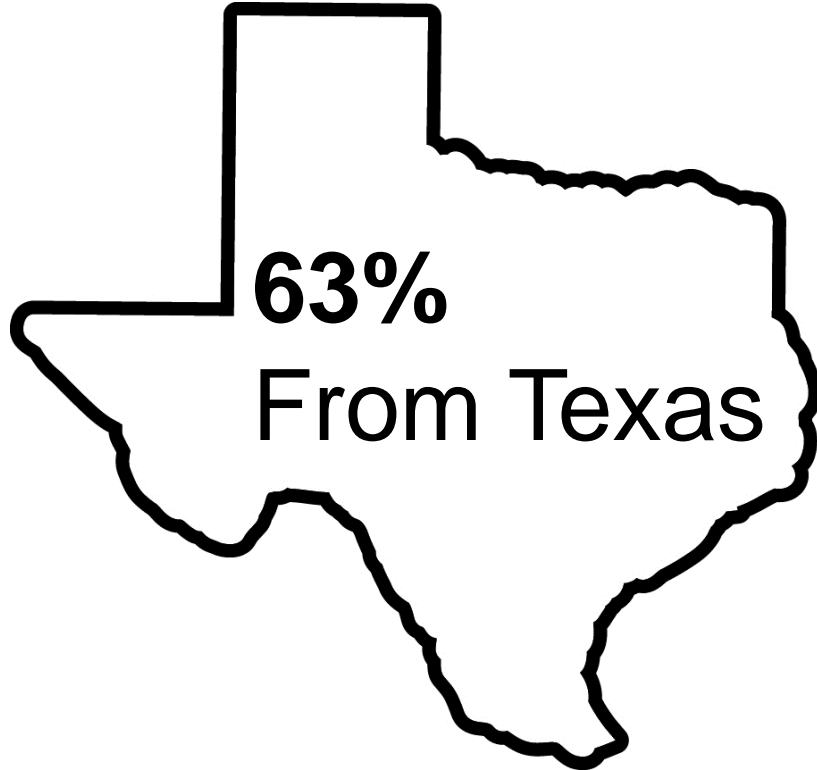


2019



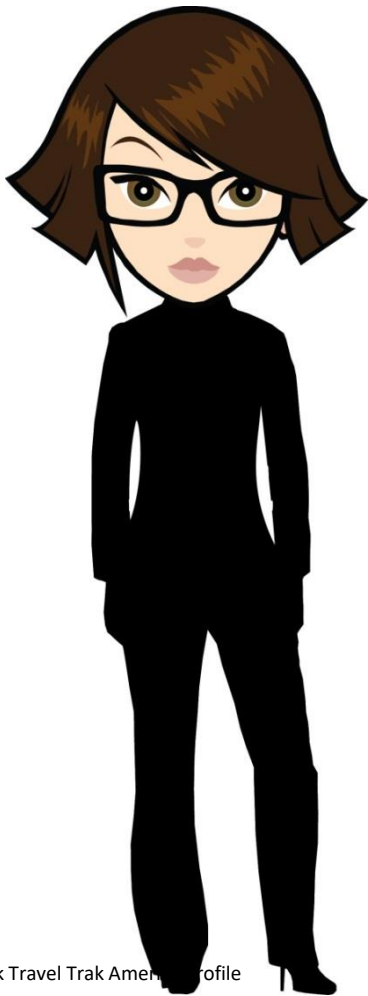
Mix of Business for Houston 2019

Who is Houston's target leisure domestic visitor?



5% from Louisiana

Lisa



60%

Female

44

Years old

60%

Married

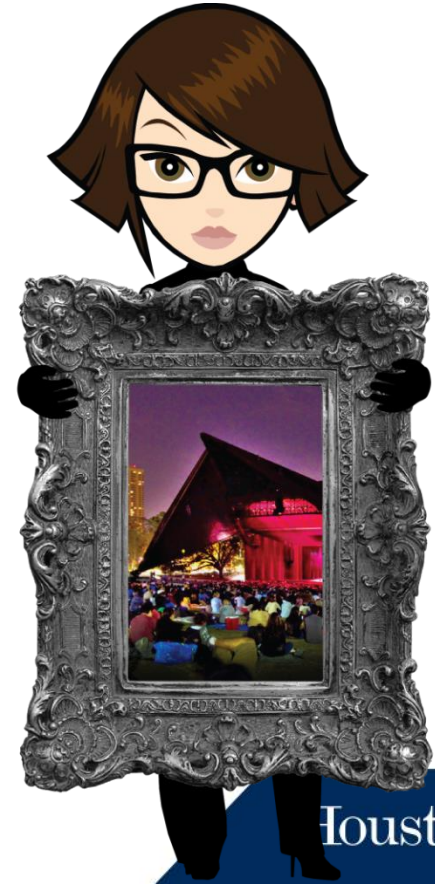
49% of target ranks Houston as having a variety of nightlife and entertainment options



52% of target ranks Houston as a great place to shop



44% of target ranks Houston as culturally diverse



THANK YOU