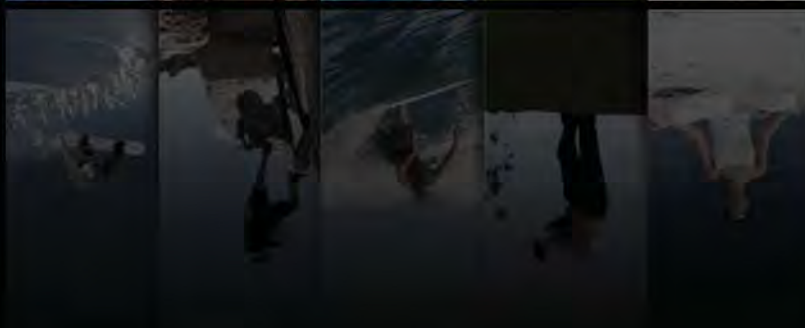


February 25, 2015

SPORTS TRAVEL MARKETING AND IMPLICATIONS



Presented for:



Presented by: Jon Last, President

**SPORTS &
LEISURE**
RESEARCH GROUP

AGENDA

- The Competitive Context: More choices and More Complex Decisions
- Why Multi-Generational Marketing Could be the Next Big Thing in Sports Travel Marketing
- From the “Me” Generation to the “Pay Attention to Me” Generation
- An Emerging Model for the Sports Traveler Destination
- Building Customer Loyalty with a “2C2R” Approach
- A Directional Outlook on Sports Travel Market Conditions



More Choices and More Complex Decisions



"PRIOR SLRG RESEARCH OUTLINES THE PROCESS OF TRAVEL DECISION MAKING. WE CAN APPLY THOSE INSIGHTS TO THE ACCUMULATION EFFECTS OF A CAMPAIGN, THROUGH ONGOING MEASUREMENT."



Source: 2005-2008 Process of Vacation Planning Studies conducted by Sports & Leisure Research Group principals

"...AND ADAPT MORE RELEVANT QUESTIONING TO METRICS SPECIFIC TO THE VACATION TRAVEL CATEGORY AND TO THE ROLE OF TV ADVERTISING IN PROVIDING INSPIRATION."



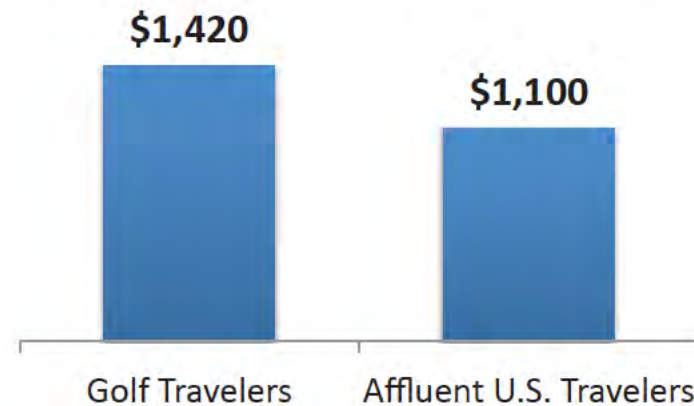
- Ideas about where to go, what to do
- Encourages me to seek out more information
- Sparks my imagination
- Increasing my desire to engage

Source: 2005-2008 Process of Vacation Planning Studies conducted by Sports & Leisure Research Group principals

The Importance of The Sports Traveler: Outspending Affluent Americans on Non Endemic Components of their Vacations

Golfers spend nearly 30% more on their vacations!

Family/Business golf trips show significantly higher personal spending



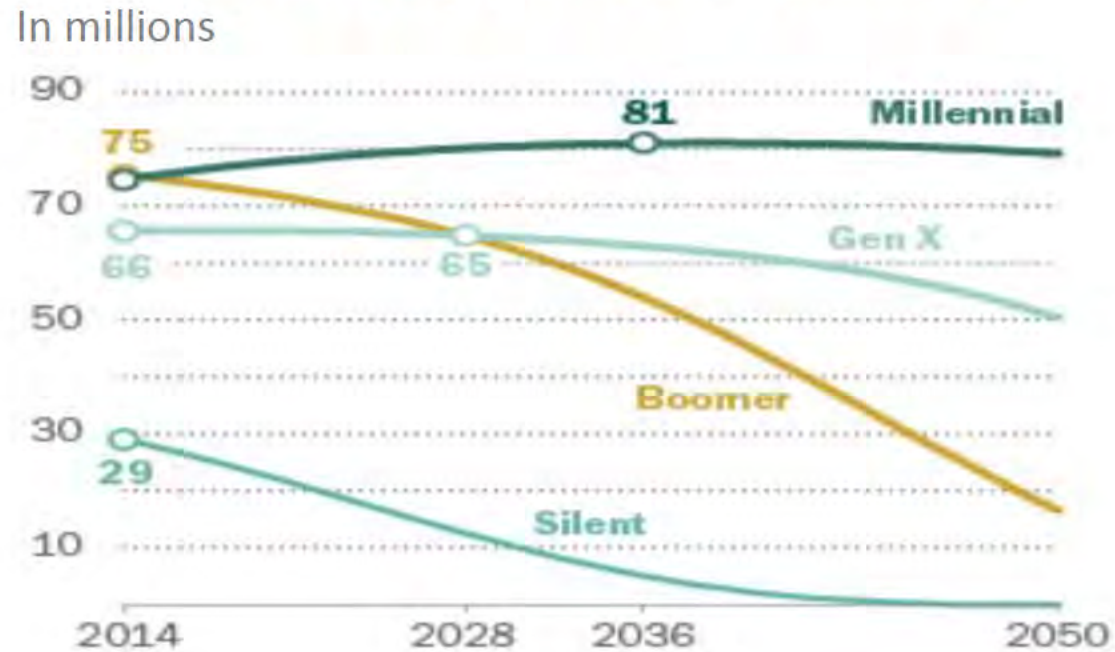
	Golf Travelers	Affluent U.S. Travelers	Golfer Advantage
Lodging	\$400	\$300	+33%
Transportation	\$250	\$200	+25%
Entertainment	\$200	\$122	+64%
Food & Beverage	\$200	\$200	--

Source: Outlook for Sports Tourism



Why Multi-Generational Marketing Could be the Next Big Thing in Sports Travel Marketing

PROJECTED POPULATION BY GENERATION



Note: Millenials refers to the population ages 18 to 34 as of 2015

Source: Pew Research Center tabulations of U.S. Census Bureau population projections released December 2014



ZOOMING AHEAD...

GODSPELL

MEETS

**God's Waiting
Room**



A Redefinition of Retirement

- Active, relevant and engaged in a variety of unique experiences
- Health conscious: 60 is the new 40
- Adventure Travel
- Flexibility -- Country Club for a day vs. Country Club communities

The “Sandwich Generation” Comes of Age

- Aged 40-49, they aren’t “Boomers” or “X-ers,” but have attitudinal values of both

VALUES

Child Centricity

Self Entitlement Reality Check

Survivor’s Guilt and New Definitions of Community

Caring for aging parents as well as their own kids in a new competitive paradigm

IMPLICATIONS

Meet demands for value, simplicity and efficiency

Provide a “Safe Haven” for the family”

Bridge the gap between multiple generations

Don’t Ignore the “greater good”

Build an enriching “community”



...And What About those Millennials?

- More fashion and image conscious than older cohorts
- More apt to engage in digital media, particularly for purchase transactions
- Perceive themselves to be more innovation seeking and self indulgent
- Value their families and the “safe haven” of “the nest”



Boomers And Millennials Aren't As Different As Some Might Lead You To Believe!

MediaPost News Events Awards More Q

MARKETING:sports

From The 'Me' Generation To The 'Pay Attention to Me' Generation

by Jon Litt - 4 hours ago

Comments

Last month in this space, I spoke to a need for sports marketers to think about multi-generational approaches in their brand development and communications strategies. Noting that the sheer size of Boomers and Millennials have created an almost singular focus on these two generations, at vastly different life stages, I drew parallels across them, culled from some of our recent fan and consumer research. Subsequently, in framing remarks for a recent conference presentation, I've thought further about how what on the surface appears to be utopianous

AS YOUNG ADULTS

Boomers

Individualistic self expression through civil disobedience

"Don't work for 'the man'"

The power of community

Millennials

Individualistic self expression through social media sharing and citizen journalism

Frustration with "under-employment", "I should be running the company by the time I'm 35"

The power of community

LATER IN LIFE

Boomers

Self actualization through collection of experiences and a redefinition of retirement

Sports as a manifestation of community

Millennials

Similar generational values=???



Coming Together: Why Multi-Generational Travel Makes Sense:

- Optimize precious time commoditization
- Meet each generation's need for activities with purpose and self-actualization
- Convergence of the formerly disparate disconnect of family time and "me time"
 - Have your cake and eat it too
 - Entry Ramps to Life long activities



An Emerging Model for the Sports Traveler Destination

The Vacation as Sanctuary:



The New Destination Paradigm—Adapting To New Realities



- Personal Concierges
- Portability
- Social Spaces
- The Health Club Model
- Family Programming
- Create the ultimate Community
—Literally and Figuratively

Self Actualization Through:

- Building Poignant and **UNIQUE** memories/experiences



Foundations of Customer Loyalty: A 2C2R Sports Travel Marketing Approach

LOYALTY MARKETING FOUNDATIONS



A Directional Outlook on Sports Travel Market Conditions

Media Proliferation: More is More

“ *With the proliferation of new media—those most engaged see new media as additive rather than as replacements for traditional, trusted sources.* ”

– November 12th, 2013

MediaPost's
MARKETING*sports*

*In fact, it appears to have **FUELED** the consumption level of sports fans.*



A Directional Outlook on Sports Travel Market Conditions

Media Proliferation: How Sports Travelers are Consuming Media

VORACIOUS.

Sports travelers are increasing their usage of all media channels to enhance their travel experience, and television, print and websites are most prevalent.

ADDITIVE.

In a fragmented environment, new media channels have seen slow but steady adoption. However, new media consumption isn't coming at the expense of traditional media.

DIVERSE.

Cross platform usage patterns show sports travelers perceiving different media having unique strengths across various content areas.

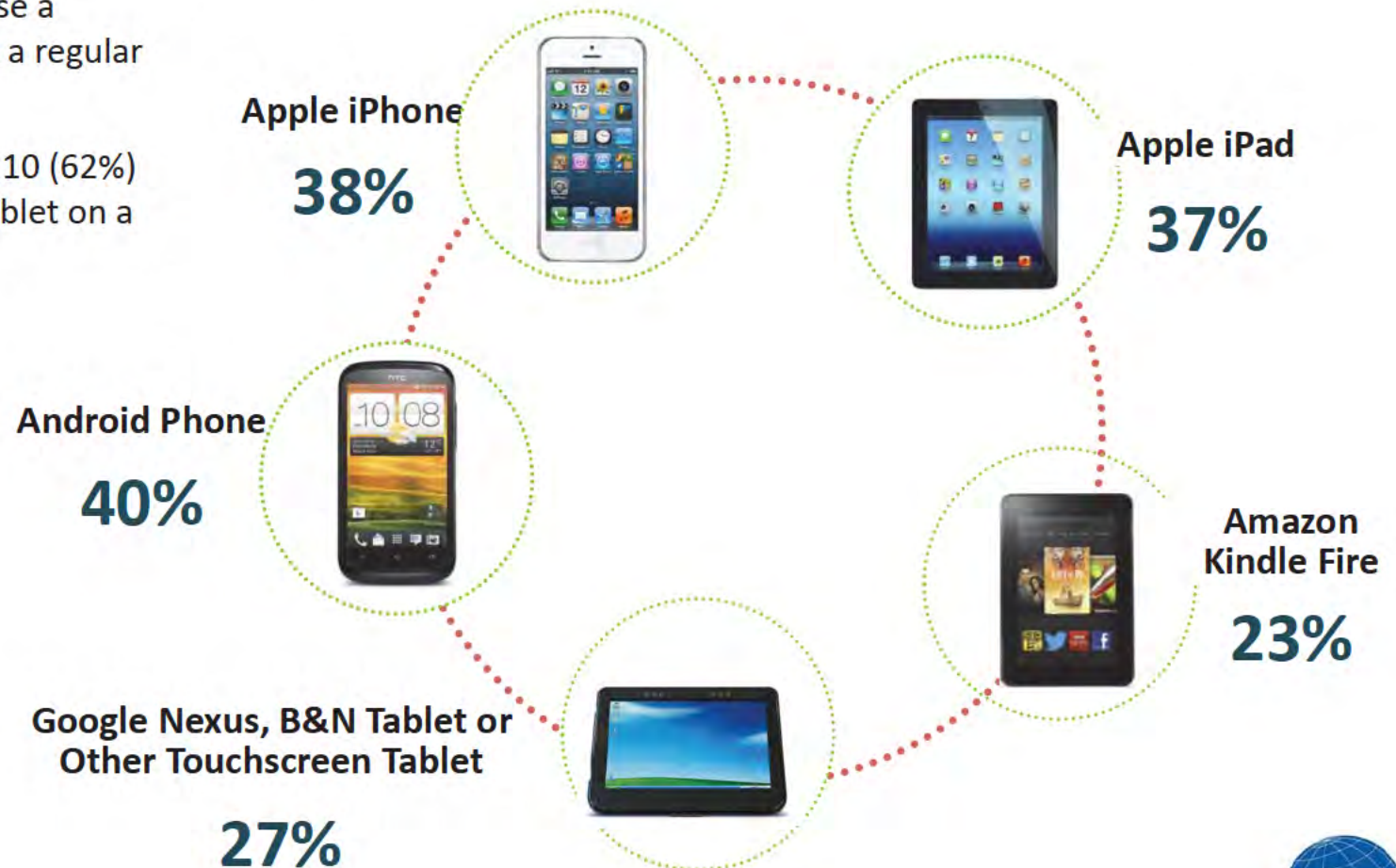
ENGAGEMENT.

Print media shows particular strength in delivering content in an undistracted environment, while heavy DVR usage and multi-tasking behaviors create a conundrum for television advertisers.

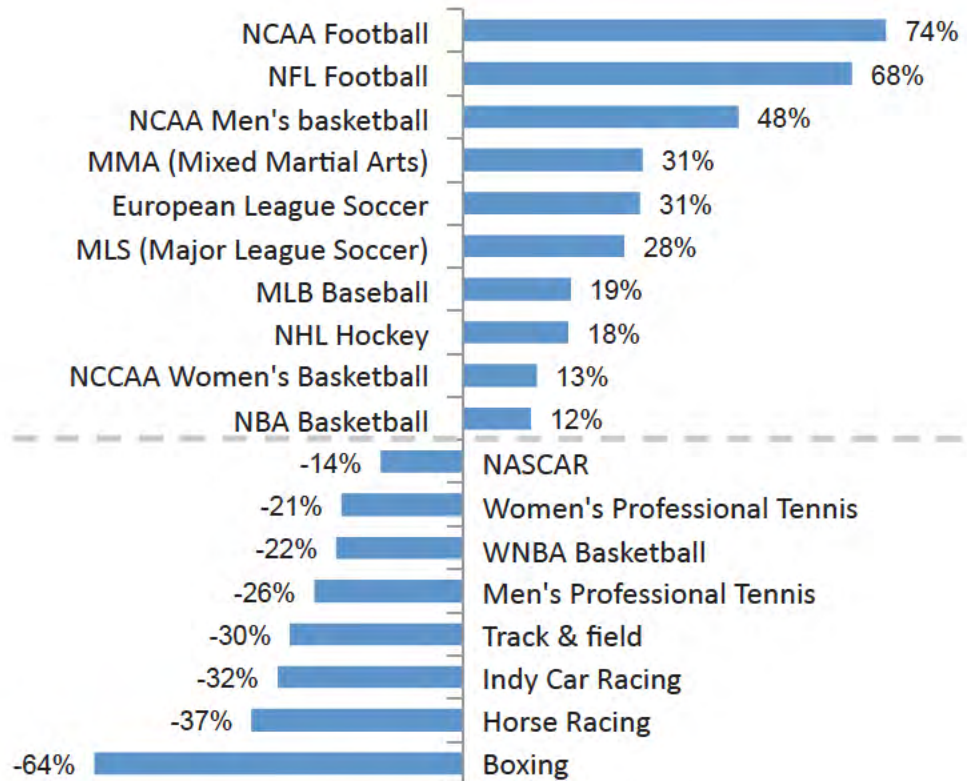


High Rates Of Device Adoption

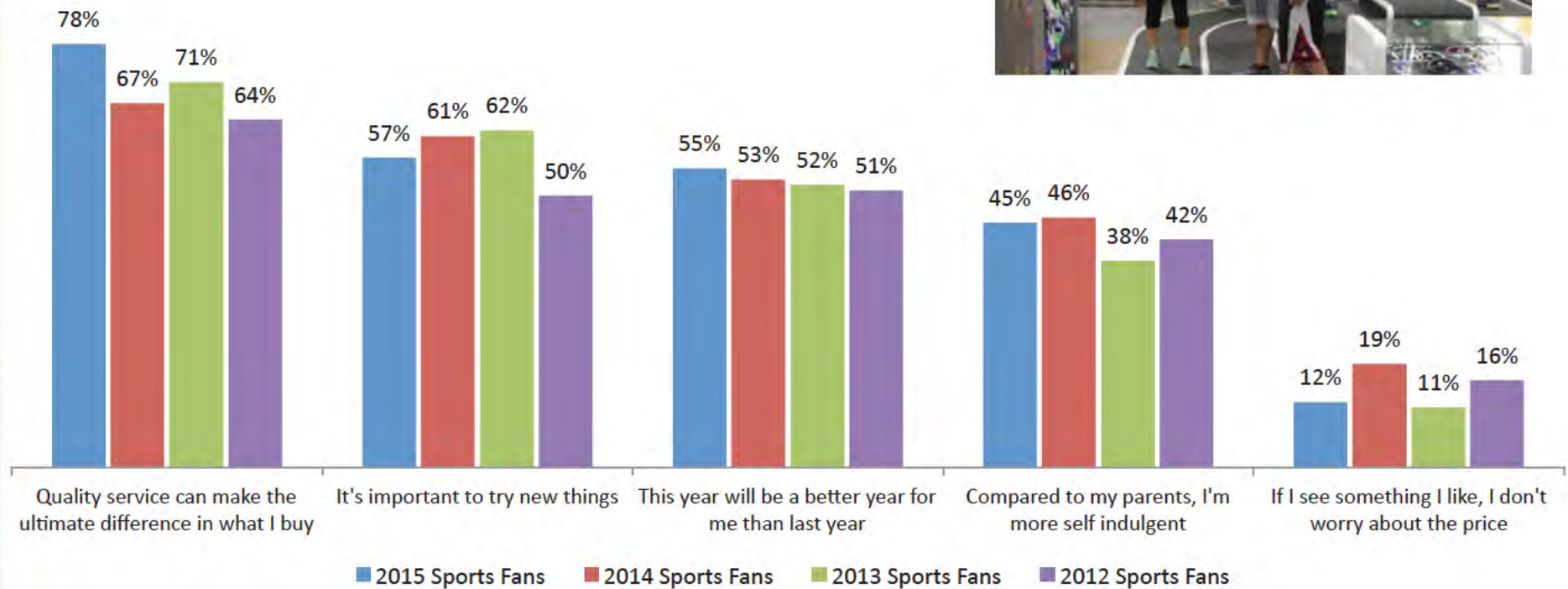
- 3 in 4 own or use a smartphone on a regular basis
- More than 6 in 10 (62%) own or use a tablet on a regular basis



A Look at Spectator Sport Popularity Shifts: Bring on More Football

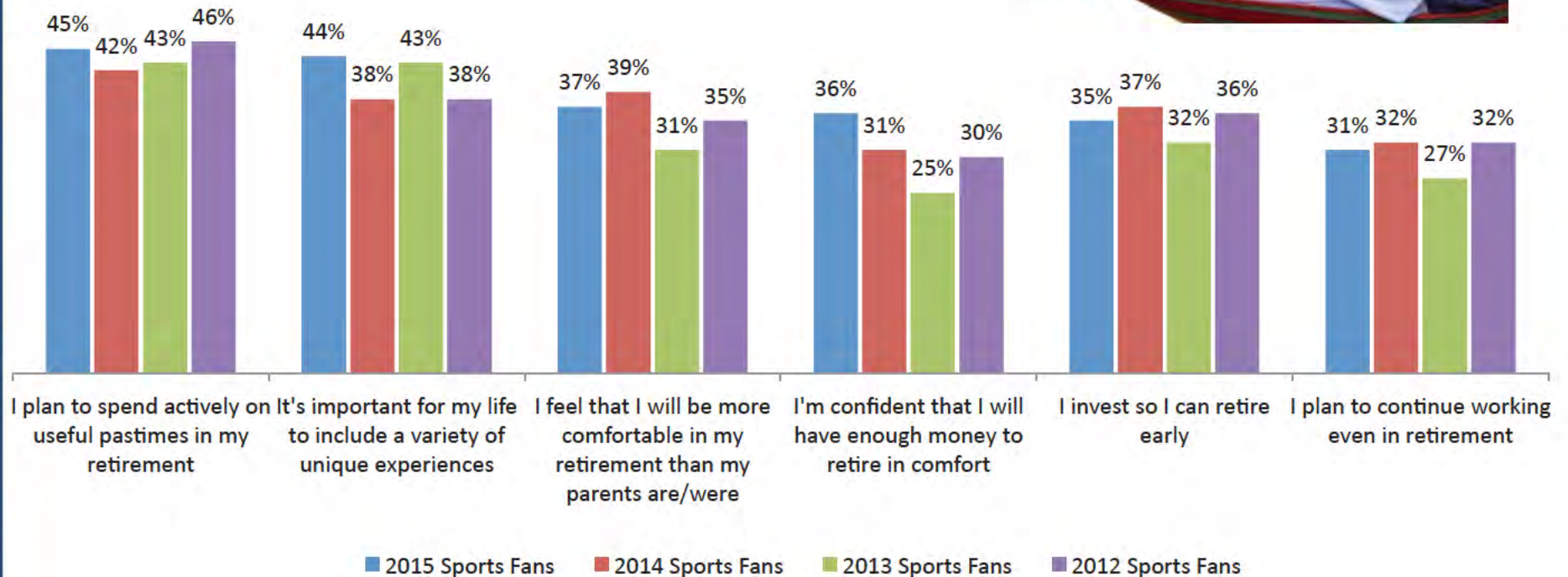


Sports Fan Attitudes: Service is King



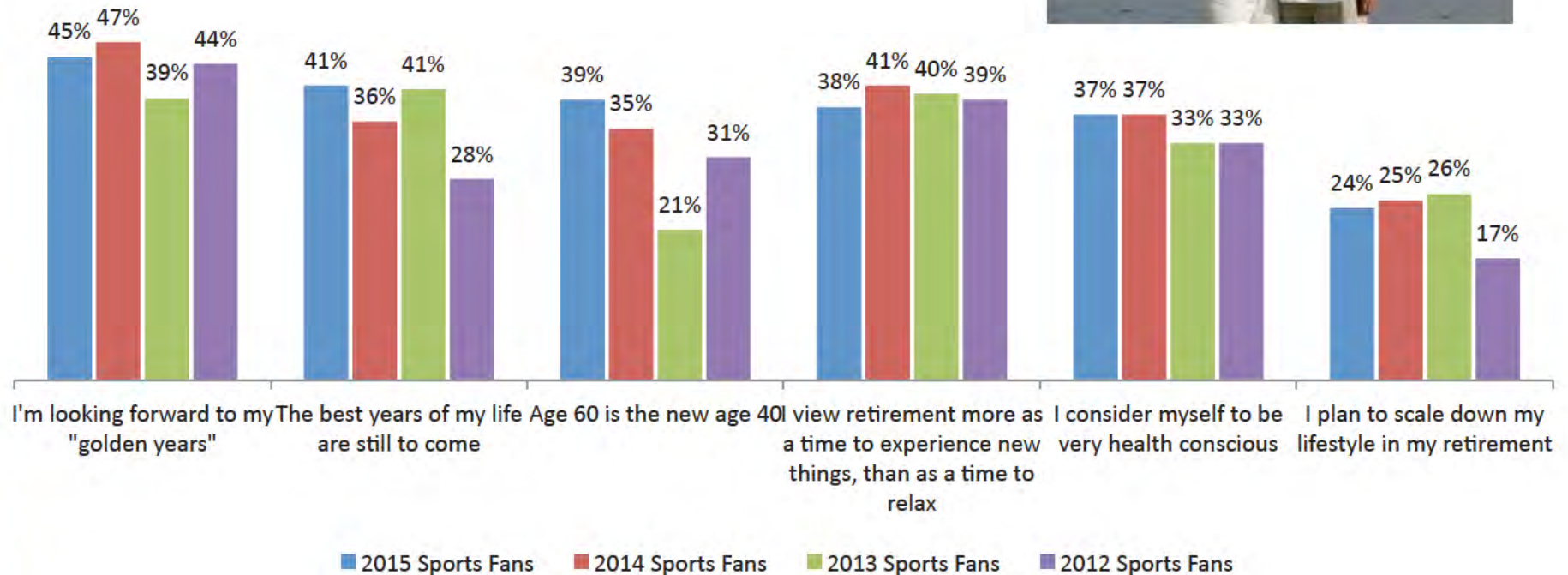
Top 3 Box Summary

Sports Fan Attitudes: More Confidence



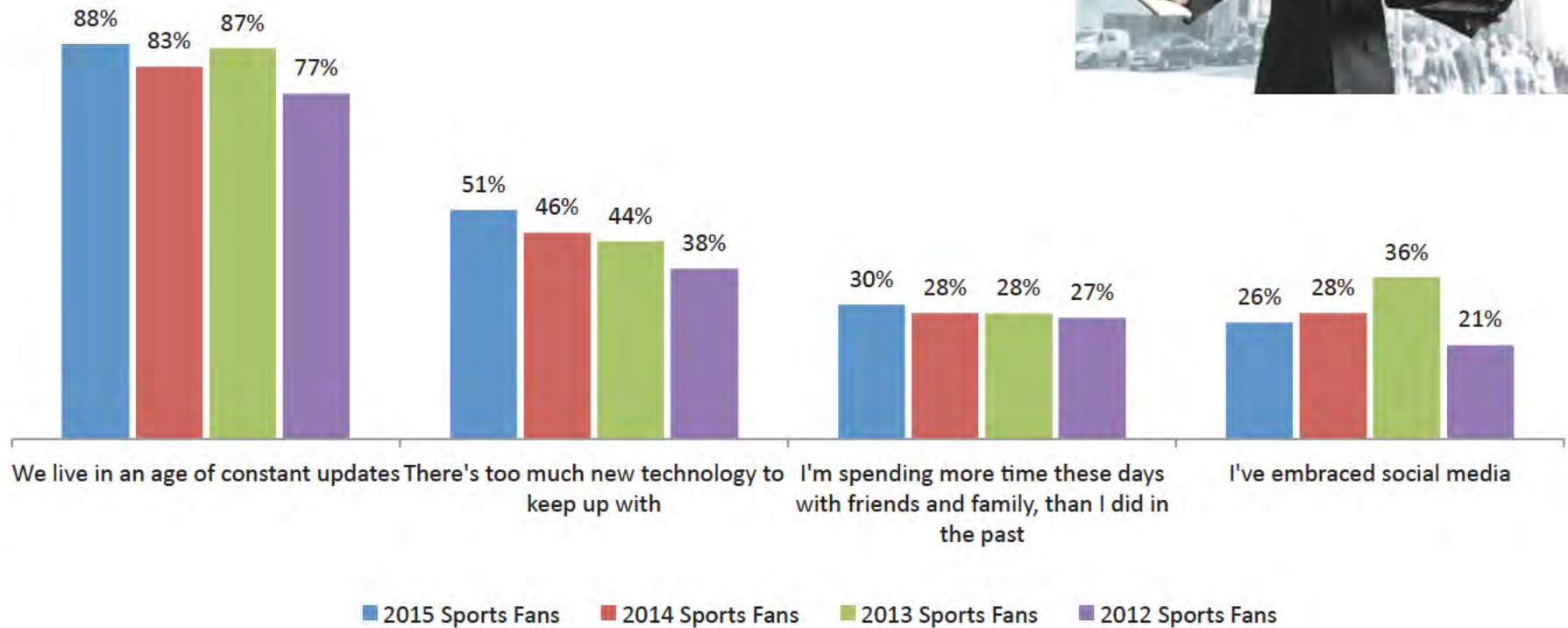
Top 3 Box Summary

Sports Fan Attitudes: On to the Future



Top 3 Box Summary

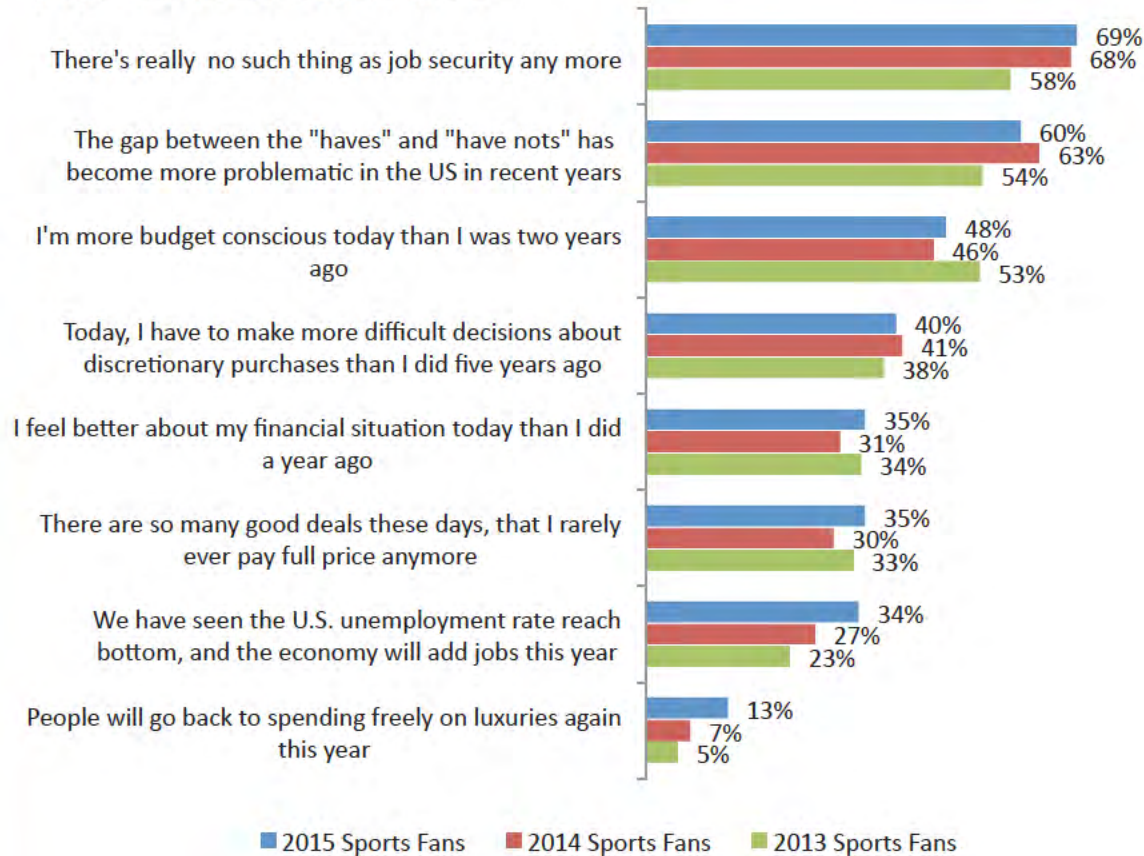
Sports Fan Attitudes: Info Overload Endures



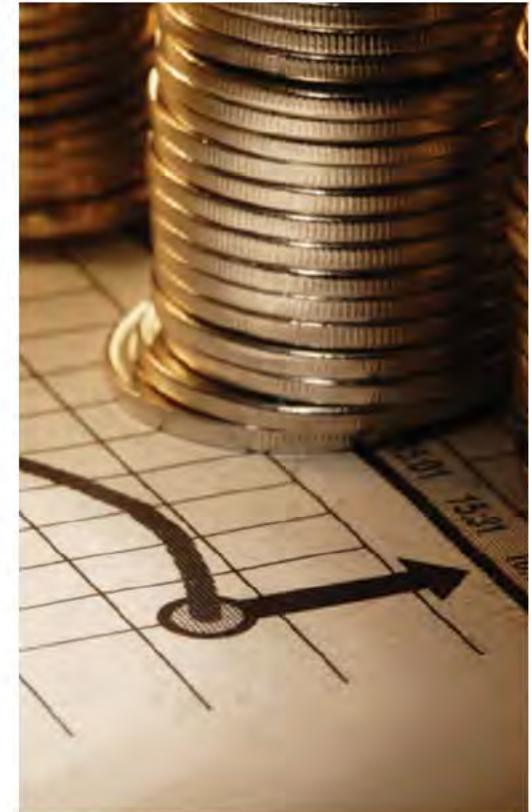
Top 3 Box Summary



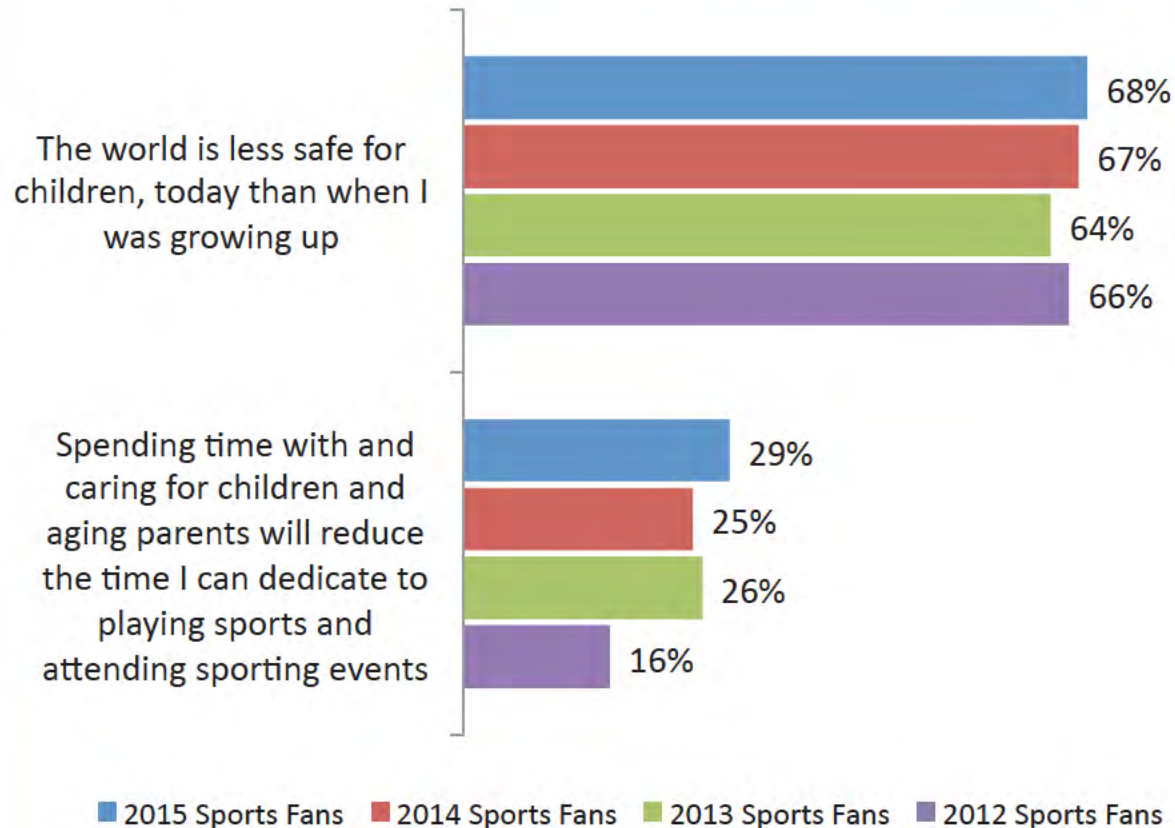
Sports Fan Attitudes: Caution Persists, Amidst Greater Faith in The Labor Market



Top 3 Box Summary

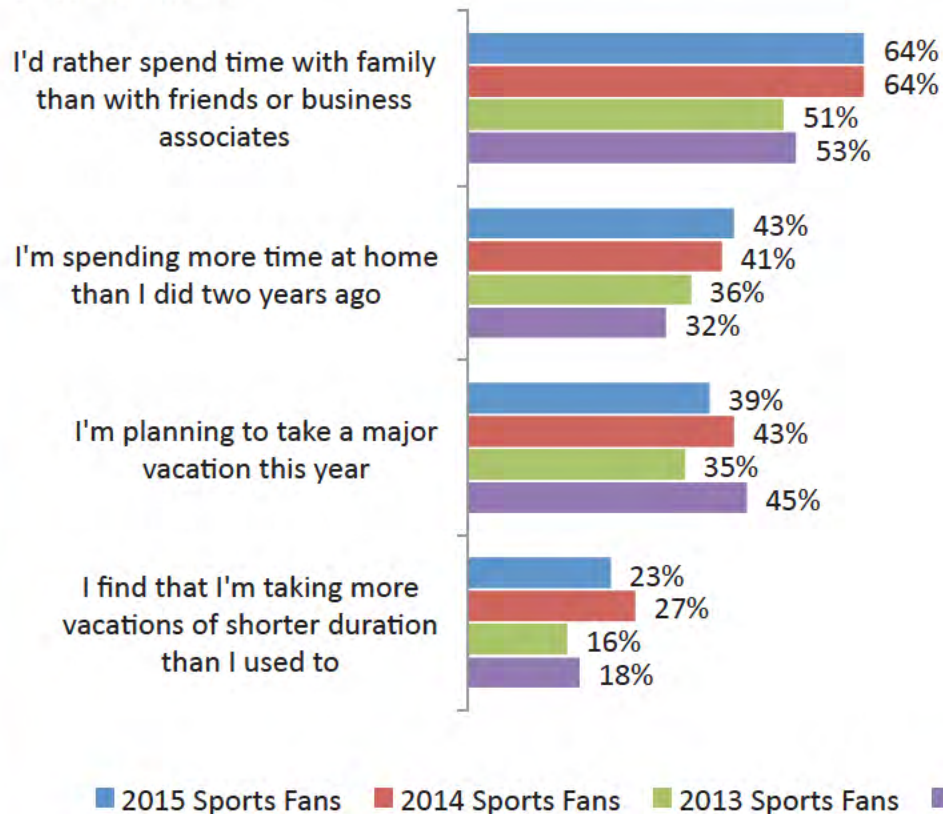


Sports Fan Attitudes: A Growing Focus on the Family



Top 3 Box Summary

Sports Fan Attitudes: Family Focus Continues to Fuel Leisure Priorities



Top 3 Box Summary

THANK YOU!

**SPORTS&
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