



# TRENDS AND INSIGHTS IN SPORTS TRAVEL 2018

## 50% PLAN MAJOR VACATION



Just under 50% of sports fans definitely plan to take a major vacation in the coming year. This a four-year high and up more than 10 points from what we observed in 2017.

Our research shows narrower booking to travel windows for younger (Under age 35) sports travelers than the 2-3 month gap observed for others.

## 60% EXPECT A BETTER 2018 VS 2017

At the onset of 2017, we saw a great deal of cautiousness and concern about respondents' personal financial outlook and job security. Now we've seen some impressive shifts in attitudes & behaviors for 2018. Our most recent tracking wave reveals that 60% strongly believe the year ahead will be better than the previous year - a four year high!



## BULLISH ECONOMIC OUTLOOK

Sports traveler agreement with the following statements are at four year highs:

- I'm confident that I will have enough money to retire in comfort
- I feel that I will be more comfortable in my retirement than my parents are/were
- I plan to spend actively on useful past times



After three consecutive years of flat results, sports fans are even more likely to consider themselves as health conscious; a phenomenon that maps nicely onto active, participatory sports travel



Survey respondents show strong concurrence with the attitudinal statement, **"I would rather spend more money than I had planned on a [sports] vacation rather than risk being disappointed by a low-priced promotion."** Our research also suggests that a more price sensitive and generally less affluent millennial sports traveler has greater comfort levels in seeking value priced, close-in, distressed inventory, whereas the more seasoned, sports traveler has demonstrated a more deliberate planning process.



## BUDDY TRIPS

Our research shows a four-year low among those sports fans who strongly agree **that it is more difficult, today, to make tough decisions about discretionary purchases than it was 5 years ago.**



We have also seen a shift in executive level sports fans indicating that they are now beginning to spend more time with business colleagues/associates. For the first time in 5 years, those indicating that they'd rather **spend travel time with family than with friends or business associates**, has actually dropped.



Rather, what strikes us as opportunistic for sports related travel is a greater inclination and focus to **indulge beyond the family**; a phenomenon that has historically correlated well with **both business and buddy sports travel.**

Sports travelers want what they know, and have demonstrated a particular preference for **known lodging brands rather than lesser known, local properties.**



With the primary focus on the sports experience, the lodging becomes secondary, and the tolerance for risk in lodging is reduced.

In fact, beyond the sports components themselves, **ease of access and nightlife are the key destination selection drivers.** This opportunity is amplified, if known national brands can leverage affiliations or access to sports related amenities or activities, thus meeting consumer demand for ease of access and simplification/ one-stop shopping for sports travel experiences.

## CONSTANT UPDATES

51%  26%

After 51% of respondents in 2015 strongly agreed that “There’s too much new technology to keep up with,” that incidence **has dropped** precipitously in half (to 26%) in 2018.



It’s our position that as more sports travel properties **grow comfortable** with providing the basic levels of functionality demanded by consumers in their digital applications, the product development cycle has moved more towards a

**focus on user-friendly interfaces and application** refinements that are more responsive to user needs.

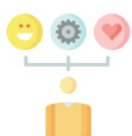
Our research continues to show growing demand and expectations for **robust and responsive websites** that provide greater detail and facilitate deeper exploration of package options, potential itineraries, pricing, etc., that are compatible with a **greater reliance on mobile platforms**.



We believe that such functionality will exhibit even greater demand in the sports travel space for travelers embarking upon these often “**bucket list**” experiences.

## USER FRIENDLY

Recognizing that more user friendly interfaces and broader functionality **can make or break the decision of a sports traveler to choose one specific destination or property over another**, has made the stakes higher in gaining greater consumer input and validation of a digital solution’s utility.



## PERSONAL TOUCH

We’ve also seen a concurrent increase in demand for a **more personal, human touch to fill in knowledge gaps** and provide proactive and differentiating customer service to high end customers **seeking to book a once in-a-lifetime sports travel experience**.



The concept of personal travel consultants, a cross between traditional reservationists and concierges has emerged as a potential source of **competitive advantage** for both packagers and sports destination properties.

## INTEGRATING BIG DATA WITH ATTITUDINAL DATA

In lockstep with technological innovation’s sweeping impacts on customer planning and onsite experience optimization, sports travel marketers and full service vertical research consultancies

like ours, have successfully exploited the ability to **integrate behavioral data with perceptual and motivational insights** derived from traditional survey market research.



Smart marketers recognize that prior behavioral data alone is not in its own right, always the best predictor of future behavior. Those who can model the “what” with the “why” have better opportunity to resonate with potential returning guests at opportune moments.

## REAL TIME CUSTOMER SATISFACTION TRACKING

We’ve been working with a number of sports and resort clients to apply the same type of behavioral and perceptual data integration, to assist properties in measuring and identifying potential service lapses in real time.



Through the use of **interactive client dashboards**, a resort or sports property can track guest behavior and interactions, and then disseminate situationally relevant satisfaction surveys that tie back to the time and location of various service interactions. When deployed properly this creates **greater engagement and loyalty** from the sports traveler, who recognizes that his or her opinions are valued, and observes service improvements on subsequent visits. We’ve seen this improve past guest retention and satisfaction across a number of sports travel destinations that have made this a priority.

## CONNECT WITH US TODAY!

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