

Trends and Forecasts in Sports Travel 2014

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TRENDS AND INSIGHTS IN SPORTS TRAVEL, AS WE HEAD INTO 2014

BY JON LAST, PRESIDENT—SPORTS AND LEISURE RESEARCH GROUP

- Bullish attitudes towards travel—Particularly among the oldest and youngest adults: Anticipated sports related travel shows its greatest strength among the youngest and oldest demographic segments, each of whom are planning more business and personal travel, with commensurate increases in expected flights. The over age 65 set sees their air travel increasing some 7% in the next year, while those under age 35 see a 9% jump. This compares favorably to flat to +4% observed among other sports travelers.
- Melding Sports travel with family travel is an unexpected bonus: Sports travelers continue to view these trips as separate and incremental to a family vacation. However, with increased focus on family travel (including multi-generational travel), those destinations and property marketers who can position themselves as having amenities to incorporate both family friendly elements, and some "sports on the side." should reap significant added attention, consideration, and ultimately bookings
- A return to wider booking windows is a bullish sign for sports travel: We've been tracking average time between bookings and actual travel dates, and saw these windows narrow significantly during the economic downturn. Recent research among sports travelers has shown that these gaps are now beginning to widen again. The booking to travel window is now at about two months. That should be good news for increased yields.
- Water, Water Everywhere: In lockstep with the family focus, inferred above, water amenities have generated greater resonance with sports travelers in our recent work. The presence of multiple swimming pools, waterfront access and other related amenities (water features for the kids) have moved up the list of on-property desires for those taking sports related vacations.

- An Immersive Experience: Sports travelers often try to combine both participatory sports along with attending professional or collegiate sporting events into their sport specific travel.
- A Unique Confluence of Old and New Media Drives Awareness and the Planning Process: We are truly at a unique cross-roads where sports oriented travelers are turning to both traditional and new media platforms to frame perceptions, build destination awareness and facilitate their travel plans. In multiple studies that we have conducted over the past six months, both younger and older demographics have certainly increased their reliance on mobile media platforms, but simultaneously they have also increased their usage of traditional media like television and magazines. This will put greater stresses on travel marketer budgets to insure a reasonable presence across the media mix.
- Quality and "Value" Continue to Trump Price: Sports travelers as a particularly affluent cohort, are willing to spend in order to obtain unique and quality differentiated travel experiences. Our tracking research continues to show consistent to growing agreement with sentiments surrounding a willingness to pay premium prices for commensurate experiences. That said, the positioning of these offerings as "specially priced" or uniquely targeted, can drive rationalization/justification of the booking decision. More than half surveyed, typically express top two box agreement with the statement "I would rather spend more money than I had planned on a [sports] vacation rather than risk being disappointed with a low priced promotion." If it is inferred that an offer is truly special, price sensitivity is reduced, as shown in numerous concept tests that we have conducted in recent months.
- An Increased DIY Focus, Drives the Need for a More Comprehensive Web Presence: While not discounting the continued importance of traditional media in building destination/property awareness and perceptions, stated above, our research continues to show an increased reliance on web based booking facilitation and specific information on package offerings as a critical component during the latter stages of the sports travel decision making process. More traditional brand advertising will drive future guests to the web. Once there, travel marketers should be "armed and ready" with a user friendly/mobile compatible booking engine, as well as a deep array of visual assets that bring the property to life.