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We track over 50 major US destinations by:

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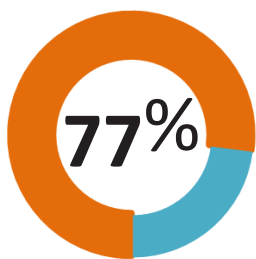
Emerging Markets:

A Hotbed of International Travel Enthusiasm

The State of the International Traveler, a study recently completed by Destination Analysts, surveyed internationally-oriented travelers in twelve of America's top feeder markets. The findings reveal an extraordinary level of enthusiasm for international travel and visitation to the United States in the emerging markets of China, India, Brazil and Mexico. These emerging markets are a hotbed of intent to travel internationally. When asked to evaluate their planned travel in the upcoming twelve months, in China (77.1%), Brazil (66.9%), Mexico (60.3%) and India (52.4%) more than half of internationally-oriented travelers intend to increase their travels compared to the most recent twelve month period. A similar story was seen in travel spending. When asked about their international travel spending priorities,

SNAPSHOT

Chinese planning to increase their international travel in 2014

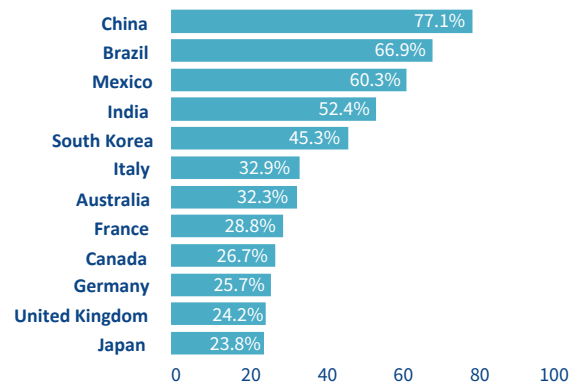


a majority of internationally-oriented travelers in the developing markets of India (52.3%), China (49.7%) and Brazil (55.9%) expect to highly prioritize these expenditures in the upcoming year.

America's appeal as a destination is also rock solid. In an open-ended question, survey respondents were asked to list the three foreign countries they would most like to visit in the next twelve months. In nine of the twelve countries studied, the United States was the top destination—in many cases surpassing its nearest competition by a large margin. Signs of weakness for America exist, however, in Europe—specifically in France, Italy and Germany. In each of these three countries, the United States' popularity is diminished relative to its performance in the other nine countries studied. The charts and images in this document reveal just some of the many other interesting findings from the study, which can be purchased from Destination Analysts.

Intent to Travel Internationally

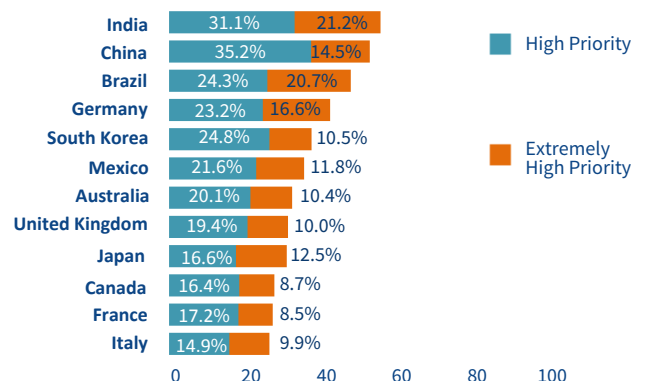
(% expecting to travel more in upcoming year)



Question: In the next 12 months, do you expect to take more, fewer or the same number of INTERNATIONAL LEISURE TRIPS than you did in the most recent 12 month period?

Priority of International Travel Spending

(% saying international travel spending is "High Priority" or "Extremely High Priority")



Question: Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities.

State of the International Traveler: The Quiz

How many questions can you answer correctly?

1. Which city has higher overall appeal ratings?



or



☐ San Francisco

☐ Orlando

2. On average, who budgets twice as much annually (than the other) for international travel?



or



☐ Japanese

☐ Chinese

3. Which country's travelers have the most available days of vacation time for international travel?



or



☐ Australia

☐ France

4. Which destination gives international travelers better overall "bragging rights" after visiting?



or



☐ Hawaii

☐ Alaska

5. Chinese travelers are more interested in which type of shopping?



or



☐ Upscale boutiques

☐ Duty free stores

6. Which travelers are most likely to use a travel agent (traditional offline or store front)?



or



☐ Australia

☐ United Kingdom

7. Who is more interested in scenic drives or road trips when traveling in the U.S.?



or



☐ Indians

☐ Germans

8. Which iconic American experience has the most overall appeal?



or



☐ Niagara Falls

☐ California's Wine Country

ANSWERS: 1. San Francisco, 2. Chinese, 3. Australia, 4. Hawaii, 5. Duty Free Stores, 6. United Kingdom, 7. Indians, 8. Niagara Falls

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METHODOLOGY: The State of the International Traveler Survey was conducted online in December of 2013. For each of the 12 feeder markets shown in the charts here, at least 800 fully completed surveys were collected from a random sample of "internationally-oriented" travelers. In total, 10,226 completed surveys were collected. The survey questionnaire was designed to take approximately 20 minutes to complete, and was developed in English and professionally translated into the native languages as appropriate. This information is provided "as is" and intended for informational purposes only. It should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Destination Analysts is not responsible for your use of the information contained herein (including errors, omissions, inaccuracy or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.