

TRACK YOUR DESTINATION'S GLOBAL PERFORMANCE

Destination Analysts' *The State of the International Traveler* is the premier study for destination marketers to better understand and predict international tourism preferences and trends and track their global brand performance.

Your comprehensive, destination-specific report includes an in-depth, country-by-country analysis of your destination as well as key insights into international travelers including content and media preferences.

We track these metrics for over 60 major US destinations:

- Appeal
- Familiarity
- Likelihood of future visitation
- Buzz (earned/paid media recall)
- Market competitive position

Find out how your destination measures up!

For more information please contact:

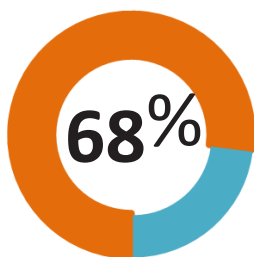
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Global Travel Outlook: A Hotbed of International Travel Enthusiasm

The State of the International Traveler, surveyed over 10,000 likely-international travelers in thirteen of America's top feeder markets.

SNAPSHOT

Chinese planning to increase their international travel in 2015



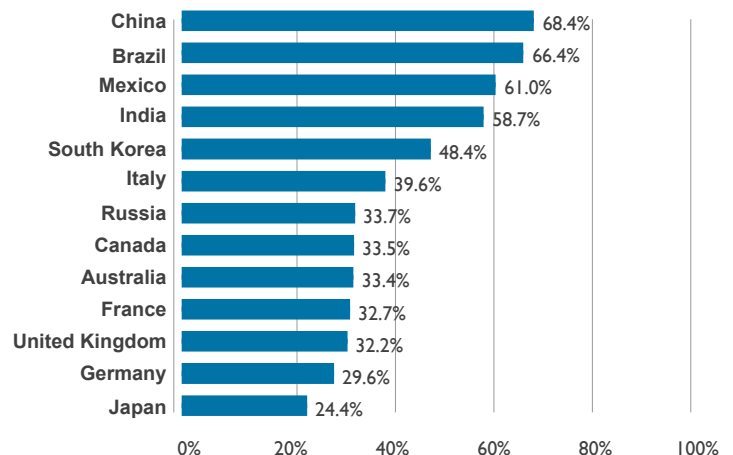
The findings reveal an extraordinary level of enthusiasm for international travel overall as well as visitation to the United States. In all countries studied, a significant proportion of likely-international travelers intent to increase their international travel in 2015. A similar story was seen in travel spending. At least a quarter of likely-international travelers in the countries studied expect to highly prioritize spending on international travel in 2015.

America's appeal as an international travel destination continues to be 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 thirteen countries studied, the United States was the top destination—in many cases surpassing its nearest competition by a large margin.

For more in-depth information about international travelers, including fascinating insights into desired experiences in the U.S., expected U.S. trip spending, lodging, shopping and entertainment preferences, content needs and travel planning behaviors, contact Destination Analysts to purchase your custom report.

Intent to Travel: International

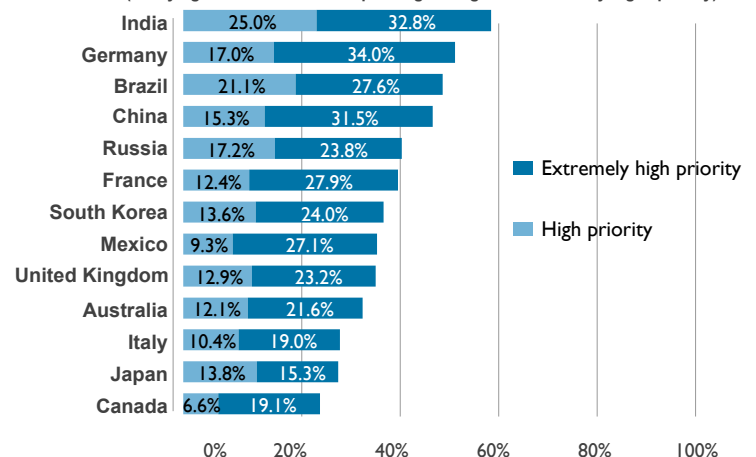
(% expecting to travel more in the upcoming year)



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" 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 in next year.

The 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. Australia, 7. Indians, 8. Niagara Falls

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The 90+ page report tracks over 60 major US destinations. Find out how your destination measures up!

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METHODOLOGY: The State of the International Traveler Survey was conducted online in January of 2015. For each of the 13 feeder markets shown in the charts here, at least 800 fully completed surveys were collected from a random sample of "likely-international" travelers. In total, 10,742 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.