UPCOMING WEBINAR:

US Travel Outlook

Use of New Technology

Google's Curated Content

Examples & Takeaways

....

Spotlight:
Big Data & Destination Decisions *with Sojern*

June 2nd 2016

THE STATE OF THE
AMERICAN TRAVELER™ April 2016 | Volume 20
TECHNOLOGY EDITION

+ A new perspective on measuring of word of mouth. pg.x

+ The state of technology adoption and travel planning. pg.x

+ Travel planning resource use, trust and importance. pg.x

+ What you need to know about peer-to-peer technologies. pg.x

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The Technology Edition

We are expanding The State of the American Traveler™ study to a quarterly basis. This new Spring edition you're reading explores how travelers use of technology, in search of insights that will help destination marketers in this ever-evolving, ever-crowded climate. We begin with a look at good old-fashioned word-of-mouth, using a novel approach to measure its importance. The study also examines technology adoption, drawing a clear picture of travelers'

aptness to use new, high-tech ways to plan their travel. The report also looks at the various travel planning resources (tech-based and otherwise) in an attempt to map what travelers really use, trust and value in their decision processes. We hope you enjoy this edition and our new format. As always, if you have questions or ideas for future survey topics, send us a message at info@destinationanalysts.com or @DA_Research.

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In Association with

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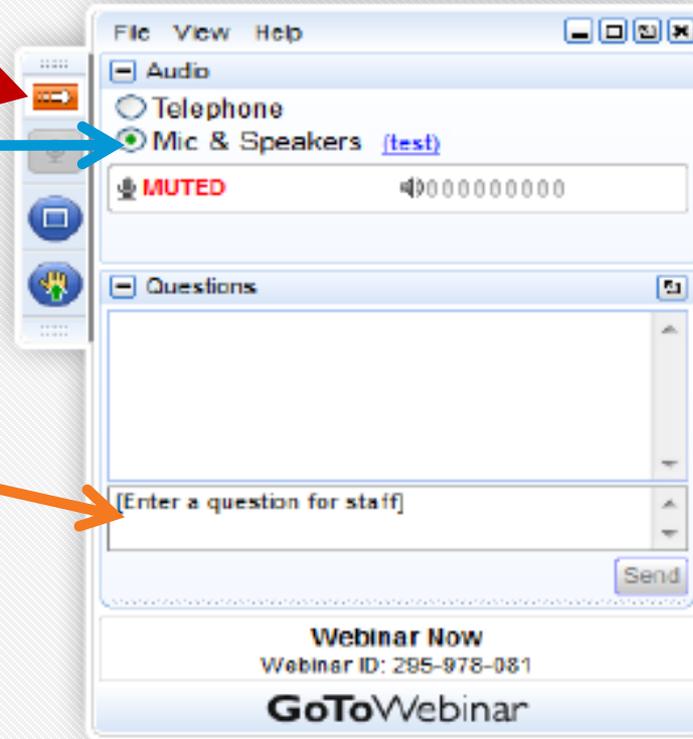
Agenda

1. Research: Travel Outlook
2. Research: Use of New Technology
3. Research: Google's Curated Content
4. Examples & Takeaways
5. Spotlight: Big Data & Destination Decisions *(Sojern)*

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The State of the American Traveler

Summary of Latest Findings

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Research Overview

- **Online survey conducted since 2006. Quarterly production beginning in 2016**

- **Survey invitation sent to a nationally representative sample of US adults**

- **Total sample of 2,000+ American leisure travelers**

- **Examines traveler sentiment, motivations & behaviors**

- **March 2016**

The State of the
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THE TECHNOLOGY EDITION

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The State of the
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TRAVEL SENTIMENT

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How are American travelers feeling about travel right now?

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Americans Expecting to Travel More for Leisure

Record High

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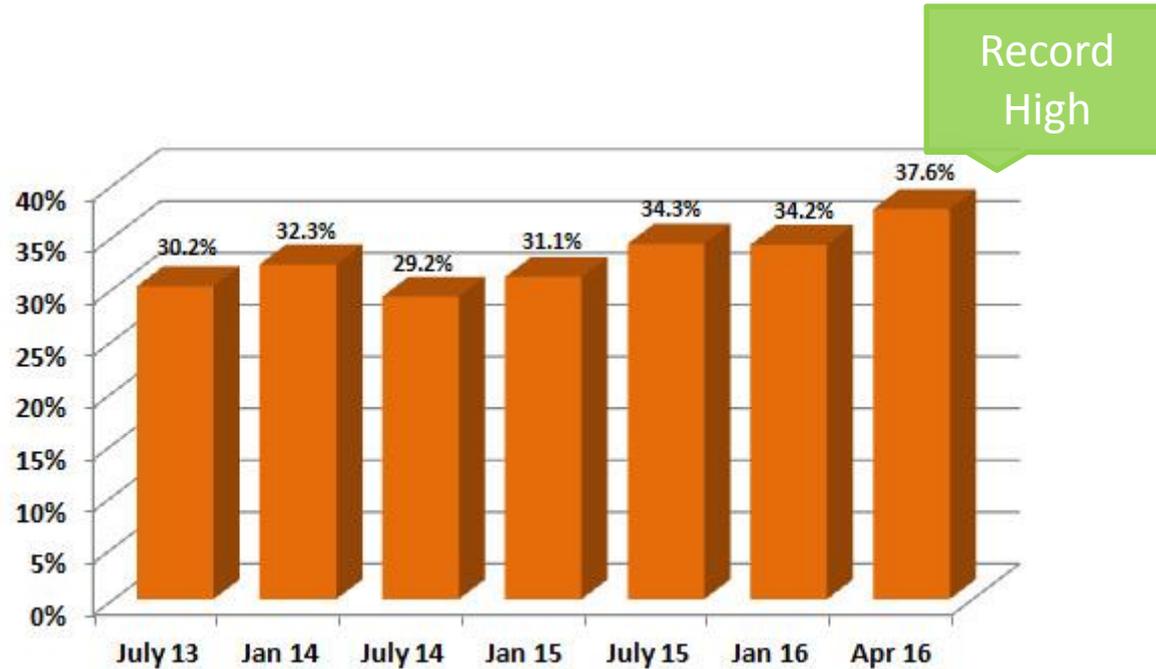
Americans Expecting to Spend More on Travel
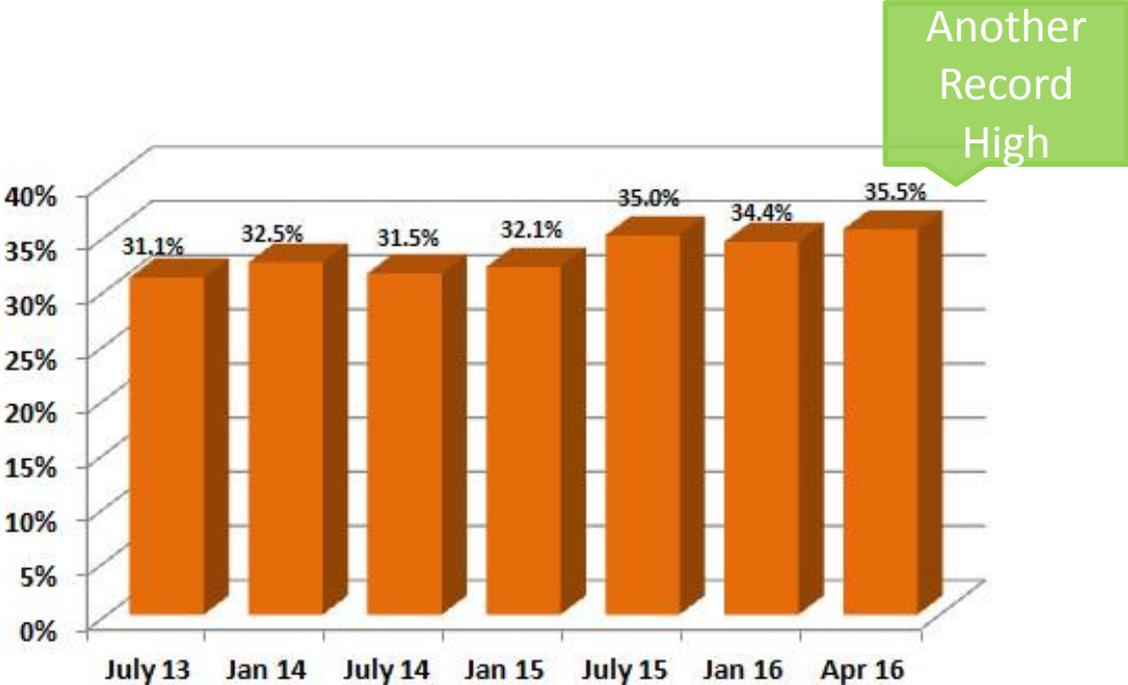
How
DESTINATION CHOICE
Is Influenced by Word-of-Mouth

Question: Please think about the people you have had contact with who have shared their opinions with you about <destination>. Did these persons' experiences, advice or opinions have any impact on your interest in visiting <destination>?

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Destination Choice Influenced by Word-of-Mouth

- **59.8%** Yes
- **35.6%** No
- **4.6%** I don't know

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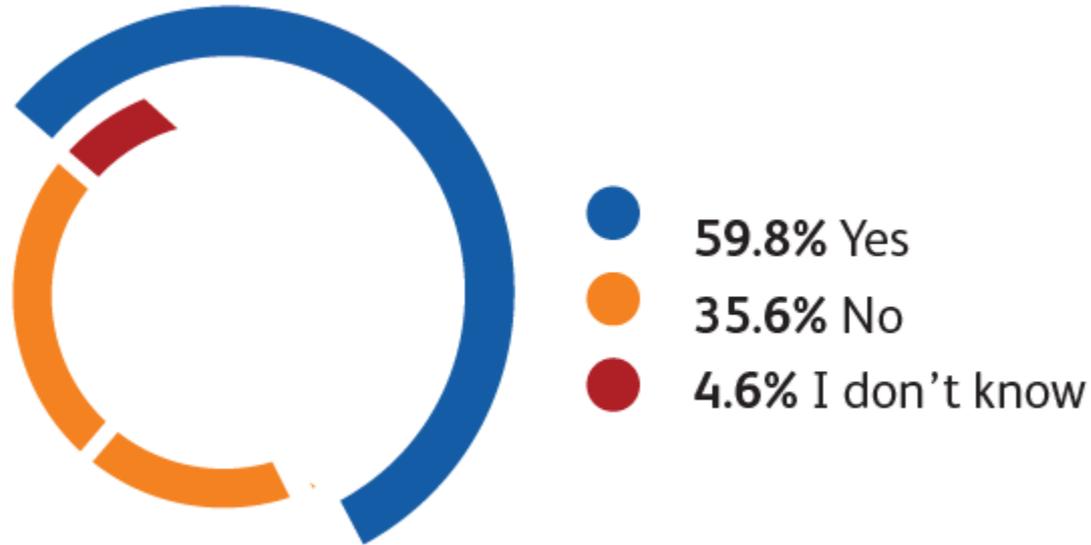
Importance of Word-of-Mouth to Destination Decision

89.2%

- **45.8%** Very important
- **43.4%** Important
- **9.9%** Neutral
- **0.6%** Unimportant
- **0.3%** Very unimportant

45.8% 43.4% 9.9% 0.6% 0.3%

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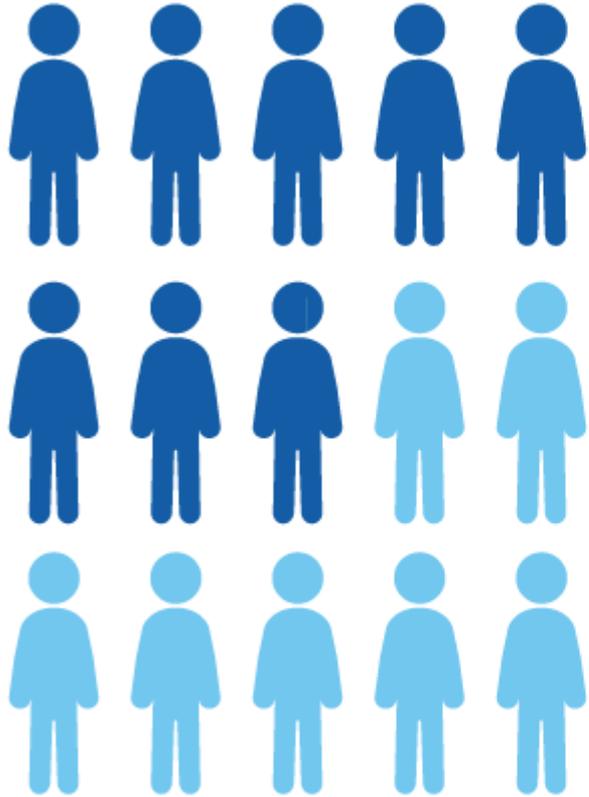
53%

Travelers' Destination Decisions Significantly Influenced by Word-of-Mouth

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How Word-of-Mouth Happens

- ● **90.4%** Personal conversation (face-to-face conversation, telephone call, etc.)
- ● **35.6%** Social media (Facebook, Twitter, Instagram, Pinterest, etc.)
- ● **29.4%** Email, texts, postcards or letters

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How Travelers Learn about New Technologies

- **64.3%** Word-of-mouth
- **37.9%** Television
- **37.4%** Social media websites
- **25.9%** Magazines (printed)
- **15.4%** Magazines (online)
- **13.7%** Technology blogs
- **9.9%** Radio
- **6.0%** Email
- **3.9%** Trade shows or conferences

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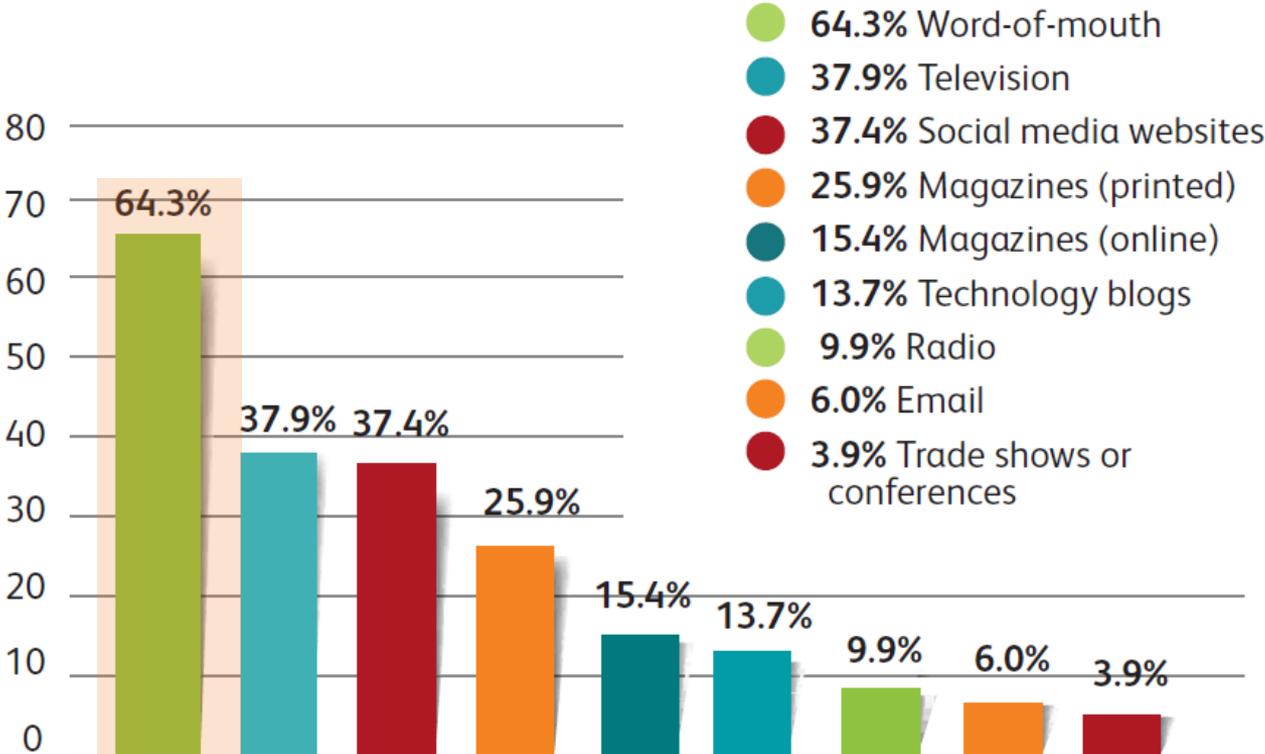
The State of the
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TECHNOLOGY ADOPTION IN TRAVEL

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Keeping Up-to-Date with Travel Technology

- **11.5%** I'm totally up to date
- **25.2%** I'm keeping up
- **35.4%** I'm generally keeping up, but not completely
- **17.1%** I'm falling behind
- **10.9%** I'm not interested in new travel technology

The Promise of Travel Technology

New technologies hold the promise to make my travel experiences much more rewarding.

Agree: 56.2%

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The Five Segments
Of Traveler Technology Adopters

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Late Majority (37.2%) – These travelers approach new technology with skepticism, and show a large gap in metrics tracked compared to the Early Majority. Far less likely to have children at home, but much more likely to be married, they tend to be older men and take the fewest leisure trips annually.

Laggards (10.2%) – The last to adopt a technical innovation, most are Baby Boomers. They are predominantly male, and travel slightly less than the norm. They are the least likely to have an income over $80K and are the most likely group to be Caucasian suburban dwellers.

Early Majority (33.4%) – Interest in advanced technologies drops off sharply with this group, as does the degree of control they personally have in travel planning decisions. Overall, this group travels less often and consumes less travel content.

Early Adopters (12.6%) – A close cousin to the Innovator, Early Adopters enjoy exploring new technologies. They're also ethnically diverse (only 54.7% Caucasian), but have lower incomes than Innovators. Their measured interest in new technologies for travel planning far outpaces the Early Majority.

Innovators (6.5%) – The first to adopt new travel technologies, Innovators are mostly Millennials (48.9%) and Gen-Xers (37.4%). They travel the most and have the largest annual travel budgets. They are much more ethnically diverse and are far less risk averse, but much more likely to "completely call the shots" in making their travel decisions.

| LAGGARDS (10.2%) | LATE MAJORITY (37.2%) | EARLY MAJORITY (33.4%) | EARLY ADOPTERS (12.6%) | INNOVATORS (6.5%) |

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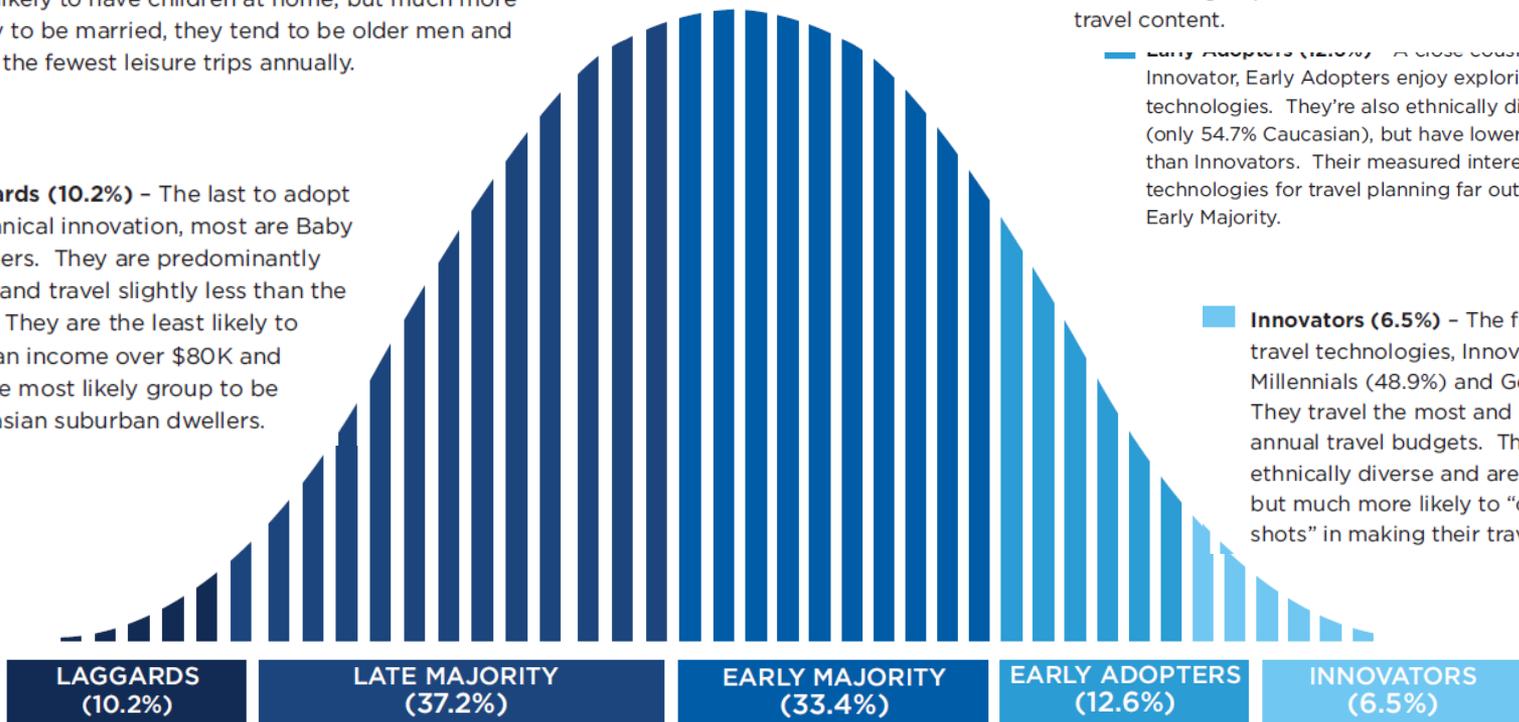
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Use, Trust & Importance in Travel Planning Resources

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Level of trust ("Always trustworthy" or "Usually trustworthy") (y-axis)

- 80%
- 70%
- 60%
- 50%
- 40%
- 30%
- 20%
- 10%
- 0%

Frequency of use ("Always use" or "Usually use") (x-axis): 0%, 5%, 10%, 15%, 20%, 25%, 30%, 35%, 40%, 45%, 50%

Data point labels:
- Friends (face-to-face)
- Relatives (via social media)
- Relatives (face-to-face)
- Official DMO staff (face-to-face)
- Google-Curated listings
- Hotel staff, concierges
- Official DMO printed visitor guides
- Review websites (TripAdvisor, Yelp, etc.)
- Travel agents (person-to-person)
- Official DMO websites
- Magazine articles (online or print)
- Friends (via social media)
- Co-workers (via social media)
- Co-workers (face-to-face)
- Travel-related TV programs
- Online video (e.g., YouTube)
- Travel businesses-Hotels, attractions, airlines, etc. (via social media)
- Official DMOs (via social media)
- Newspaper travel sections (online or print)

Importance to Destination Selection (% "Important" or "Very important")
- (>40%) Highest importance
- (31% - 40%) High importance
- (20% - 30%) Moderate importance
- (<20%) Lower importance

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Destination Selection Importance Index

Source	Mean Importance Score (5-Point Scale)
Relatives (face to face)	3.33
Friends (face to face)	3.19
Review websites (TripAdvisor, Yelp, etc.)	2.95
Official destination tourism office printed visitor guides	2.81
Official destination tourism office websites	2.79
Official destination tourism offices (face to face)	2.74
Relatives (via social media)	2.72
Travel businesses--Hotels, attractions, airlines, etc. (commercial websites)	2.72
Travel-related TV programs	2.67
Hotel staff, concierges	2.63
Friends (via social media)	2.61
Travel agents (person to person)	2.61
Magazine articles (online or print)	2.60
Newspaper travel sections (online or print)	2.57
Travel businesses--Hotels, attractions, airlines, etc. (via social media)	2.53
Co-workers (face to face)	2.52
Online video (e.g., YouTube)	2.46
Official destination tourism offices (via social media)	2.42
Co-workers (via social media)	2.25

Trust Index

Source	Mean Trust Score (5-Point Scale)
Relatives	3.91
Friends	3.84
Hotel staff, concierges	3.33
Official destination tourism offices (person to person contact)	3.32
Relatives (via social media)	3.30
Official destination tourism office websites	3.29
Official destination tourism office printed visitor guides	3.29
Review websites (TripAdvisor, Yelp, etc.)	3.28
Travel agents (person to person)	3.22
Friends (via social media)	3.21
Co-workers	3.20
Travel-related TV programs	3.15
Magazine articles (online or print)	3.12
Newspaper travel sections (online or print)	3.11
Online video (e.g., YouTube)	2.99
Official destination tourism offices (via social media)	2.90
Travel businesses--Hotels, attractions, airlines, etc. (via social media)	2.86
Co-workers (via social media)	2.86

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Organic Search Results Winners

Mobile search results screenshot showing:

1. The Top 10 Things to Do in Portland - TripAdvisor - Portland, OR Attractions ...
TripAdvisor › Attractions-g52024-Activi...
Mobile-friendly - Book your tickets online for the top things to do in Portland, Oregon on TripAdvisor: See 31605 traveler reviews and ...
Columbia River Gorge ...

2. Things to Do in Portland, Oregon - Travel ...
https://www.travelportland.com › things-t...
Mobile-friendly - Plan your trip to Portland, Oregon, with guides to activities, attractions, events, dining, culture, neighborhoods and ...

3. Things To Do In Portland - Deals in Portland, OR | Groupon
Groupon › Local › Oregon › Portland
Mobile-friendly - Things To Do in Portland, OR : Discover the best things to do in Portland with deals of 50-90% off every day along.

4. Top things to do in Portland - Lonely Planet
Lonely Planet › ... › Oregon
Mobile-friendly - Discover the beauty, culture and history of Portland on a guided bike tour -- the ideal way to experience the city!

Bar chart:

- DMO Website: 41.8%
- Trip Advisor: 37.9%
- Groupon: 12.3%
- Lonely Planet: 8.0%

(x-axis: 0% 10% 20% 30% 40% 50%)

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DO YOUR RESEARCH
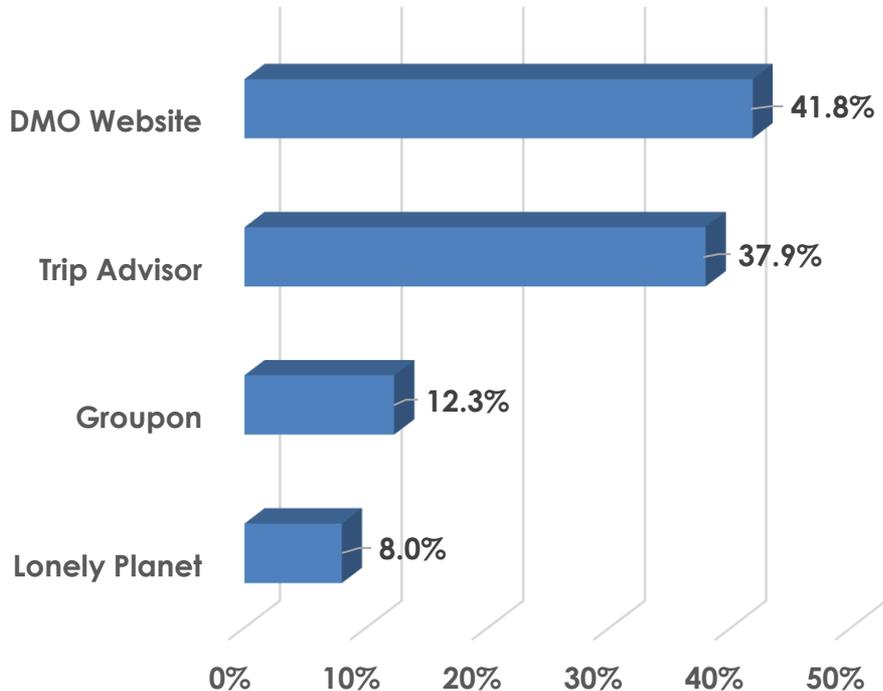
"It's the official site for the city that lists the popular attractions - a good way to get an overview"

"The tourism office will always be one that grabs the most important and preferred travel requests"

"It gives me **more choices** from which to start looking"

"They know more about their city than anyone"

"I think I would find more on the official website than on the others."

"The official guide is the most reliable"

"Official tourism sites offer all the things you may want to know"

"It offers the most likely list of what I want to see. **It presumably has no commercial incentive for recommendations.**"

"This agency website is likely to be the least biased in its listings and reporting."

"While it would be the 'rosiest' description of things to do, it's probably the **most complete** since it's compiled by a tourism office."

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SEARCH & GOOGLE-CURATED CONTENT

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Use Search Engines to Find Travel Related Information

77.2% YES
20.1% NO
2.6% I DON'T KNOW

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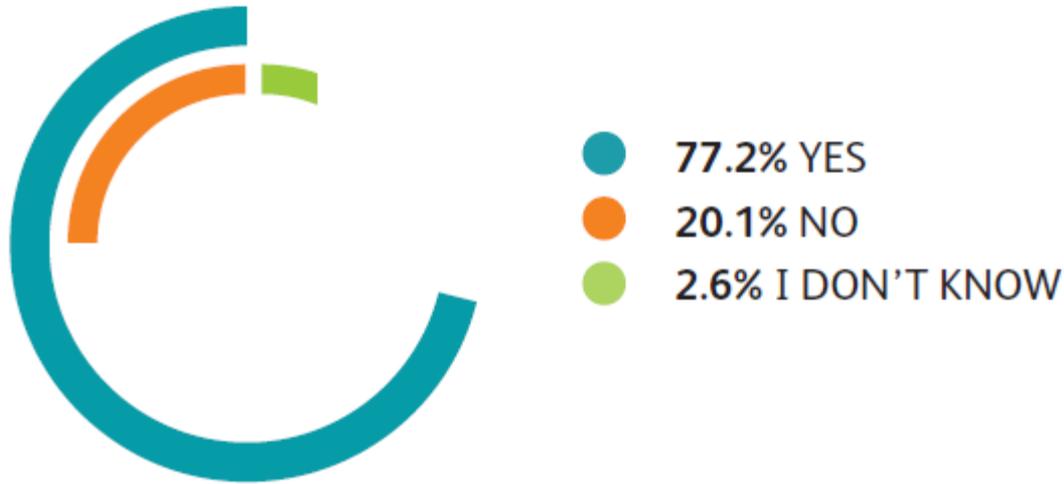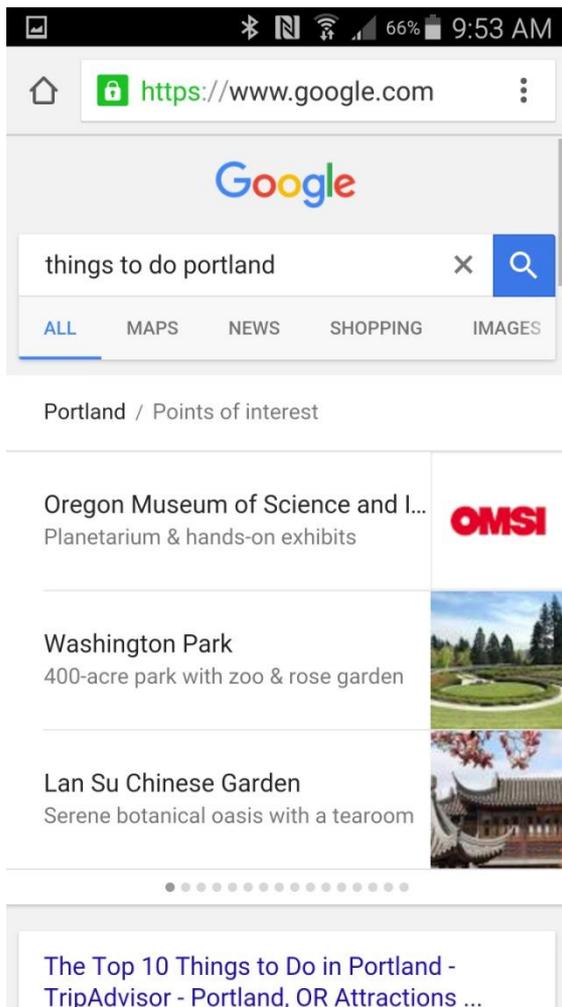
Now, please imagine you're using a mobile phone to research things to do in Portland.

You enter the search phrase "Things to do in Portland," and the following results are returned.

What would you most likely do?

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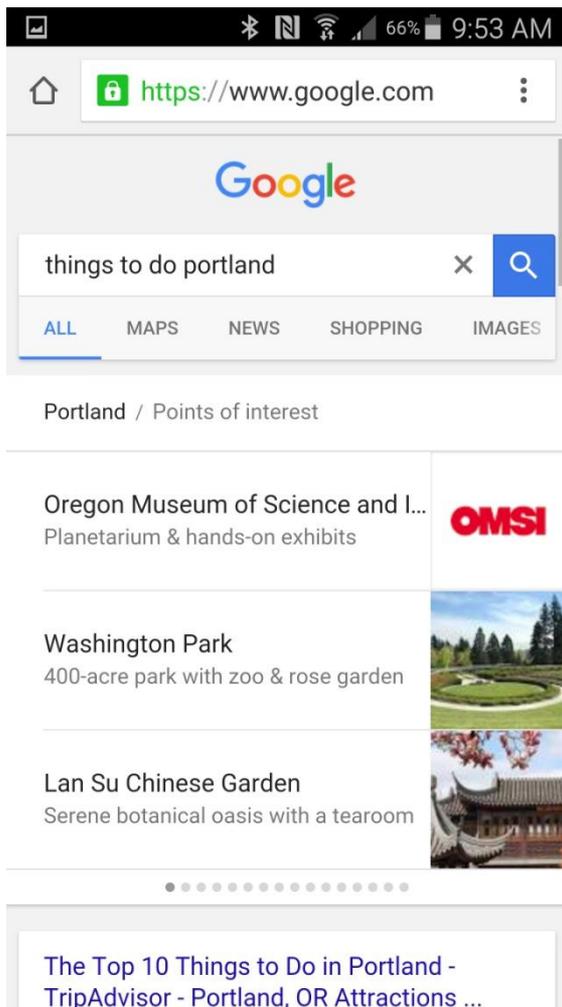
- **Click on one of the visible items—57.4%**

- **Scroll down to the organic listings—33.0%**

- **Enter another search phrase—9.6%**

Google-Curated Content

Organic Search Listings Start Here

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Google-Curated Content

Interest in Use for Destination Research

- 15.1% Very interested
- 35.8% Interested
- 32.0% Neutral
- 9.3% Uninterested
- 7.8% Very uninterested
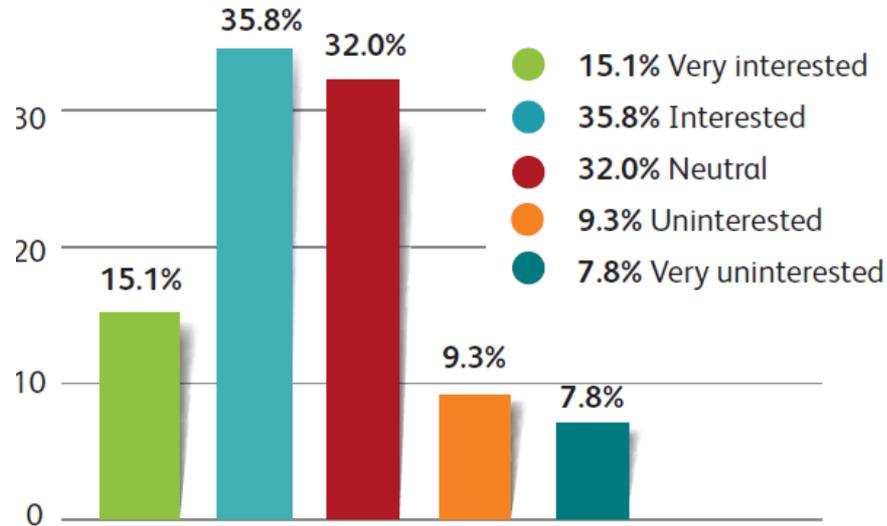
Google-Curated Content

Trust: Google-Curated Content

- **11.2%** Always trustworthy
- **44.8%** Usually trustworthy
- **37.8%** Sometimes trustworthy
- **4.8%** Rarely trustworthy
- **1.4%** Never trustworthy
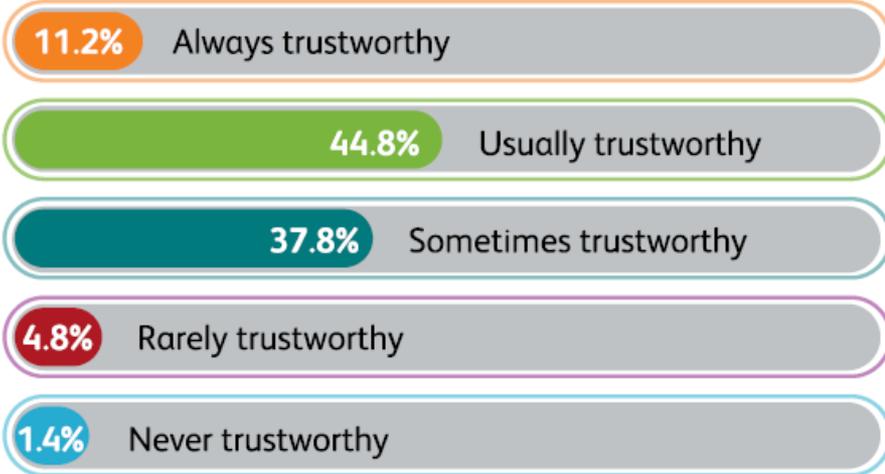
Importance: Google-Curated Content

- **10.9%** Extremely important
- **21.7%** Important
- **34.9%** Of some importance
- **19.2%** Of little importance
- **13.3%** Of no importance

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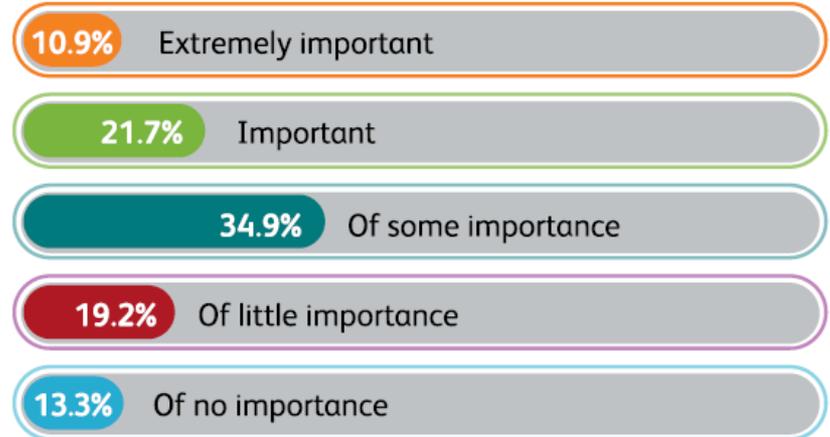
Who do They Trust? DMOs versus Google-Curated Content
(All Leisure Travelers)

I trust the local tourism office *much more*	13.7%
I trust the local tourism office more	25.8%
Neutral - I trust them both the same	49.0%
I trust Google-Curated Content more	9.6%
I trust Google-Curated Content *much more*	1.9%
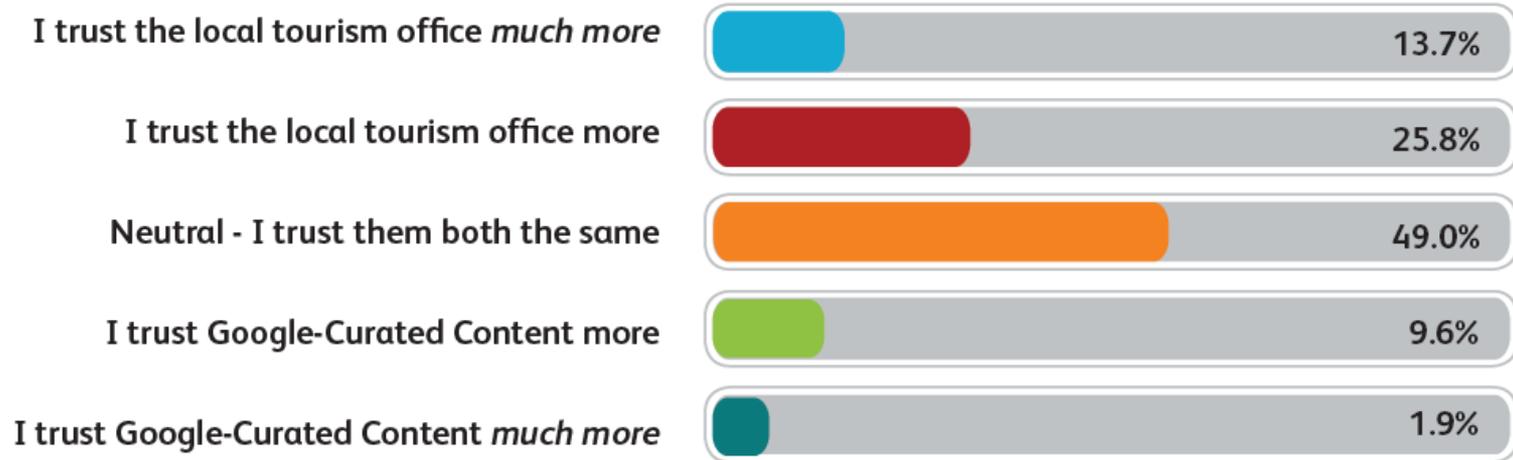
Question: Which content, opinions and advice would you generally trust more?
A local visitor bureau/tourism office or Google-Curated Content? (Select one)

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NEWEST TECHNOLOGY USE AND POTENTIAL

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VR Headsets

63.1%
Have heard of VR Headsets

7.0%
Have used a VR Headset to plan leisure travel

46.6%
Would be interested in using a VR Headset to plan travel if good content were available

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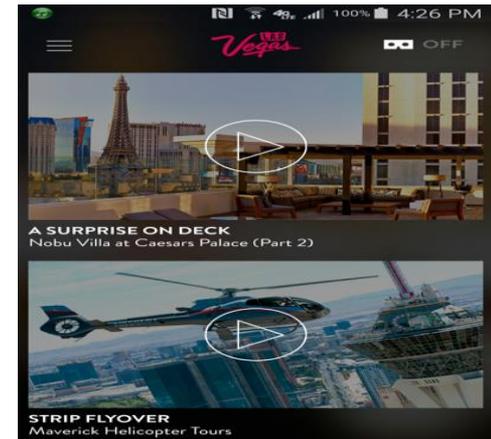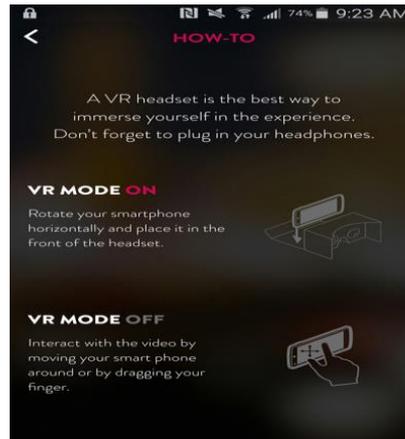
Real-Time Video

38.2%
Have heard of real-time video

10.1%
Have used real-time video to plan leisure travel

45.7%
Would be interested in using real-time video to plan travel if good content were available

@_ayana3 invited followers

@txr123
Have you gone up in the Eiffel Tower yet? I hear its a lot of fun!

@Krampies joined

@clairewad invited followers

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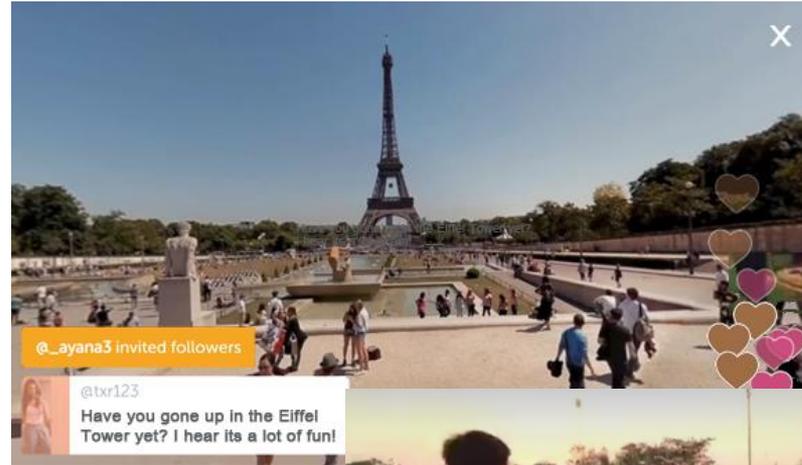
Use of Cutting-Edge Tech Solutions (Past 12 months)

|	USED FOR ANY REASON	USED FOR LEISURE TRAVEL
Voice-activated intelligent assistant (e.g., Siri or Cortana)	21.5%	12.2%
Full virtual reality headset to view 3D content (e.g., Occulus, HoloLens)	12.3%	4.9%
Smart Watch or other wearable device (e.g., Smart Bands/Smart Clothing)	11.8%	6.6%
Voice-activated Smart Speaker (e.g., Amazon Echo)	11.0%	5.9%
Simple virtual reality/augmented reality headset to view 3D content (e.g., Google Cardboard)	9.0%	7.3%
iBeacon or Eddystone technology or similar solution on mobile phone (allows Apps to receive personalized content from nearby vendors)	7.7%	6.1%
None of these	69.3%	69.6%

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Use of Peer-to-Peer Resources While Traveling

19.4%
Peer-to-peer ride service like Uber, UberX or Lyft

13.9%
Peer-to-peer lodging service like AirBnB, VRBO, Homeaway, etc.

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Use of Peer-to-Peer Resources While Traveling

85.3%

80

70

60

50

40

30

20

10

0

6.7% 5.9% 5.1% 3.7%

- **6.7%** Peer-to-peer car-sharing sites (e.g, Turo/RelayRides)
- **5.9%** Peer-to-peer bike share programs (e.g., Liquid or spinlister.com)
- **5.1%** Peer-to-peer dining service to find a home chef to host dinner in their own homes for a fee
- **3.7%** Peer-to-peer tour service for a tour guided by a local resident
- **85.3%** None of these

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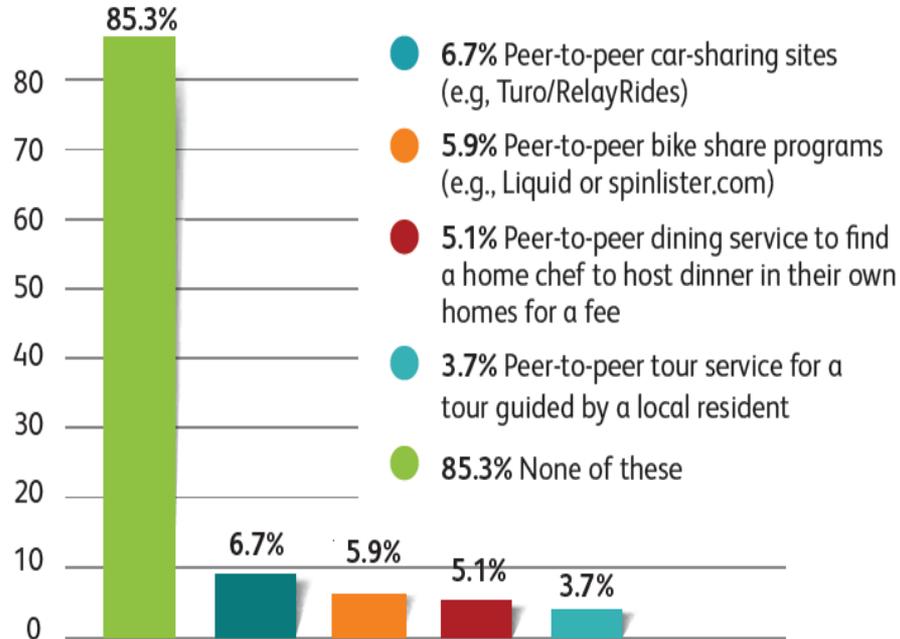
Destination Excitement Index

U.S. National Parks
Small towns, villages or rural destinations/attractions
Cities or metropolitan areas
Desert destinations /resorts
Theme or Amusement parks
Beach destinations /resorts
Mountain destinations /resorts

62
64
70
1.57
.53
1.08
61
.26
.48
49
.63
.94
58
71

Use of Apps for Travel Planning

71.4% NO
28.6% YES

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Types of Apps for Travel Planning

Online Travel Agency (Expedia, Hotels.com, etc.)	55.8%
Recommendations (TripAdvisor, Yelp, Trippy, etc.)	48.7%
Hotel (Company specific, Hyatt, Hilton, Marriott, etc.)	45.9%
Airline	44.5%
Weather	32.3%
Destination-specific (State or city tourism office)	24.7%
Hotel (Last minute travel deals)	24.3%
Transportation (Local transportation system)	20.3%
Transportation (Bus, Ferry or train)	15.5%
Travel logistics management (Tripit, tripcase)	10.6%
Luggage tracking	9.2%
Itinerary builder	6.6%
Language translation	5.2%

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MOBILE TRAVEL PLANNING

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Travel Planning Resource Usage

Mobile phone to access travel information
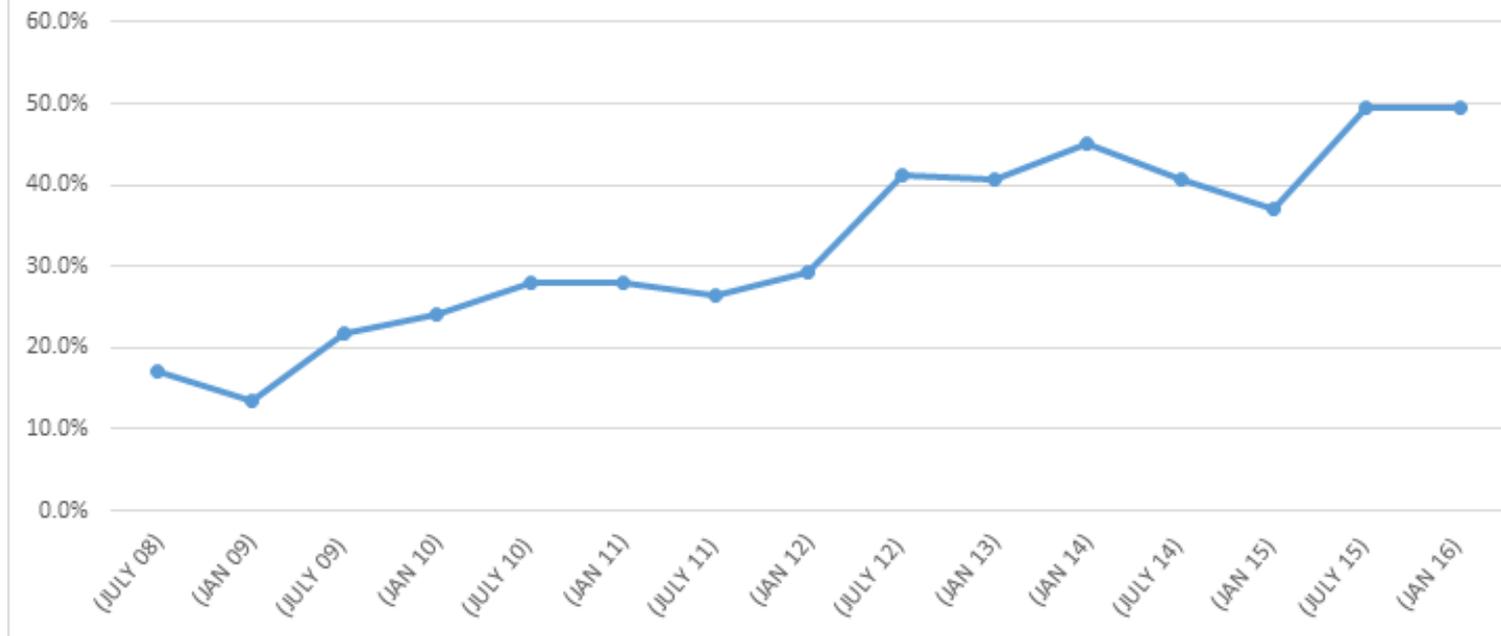
Travel Plan Extensively on Mobile
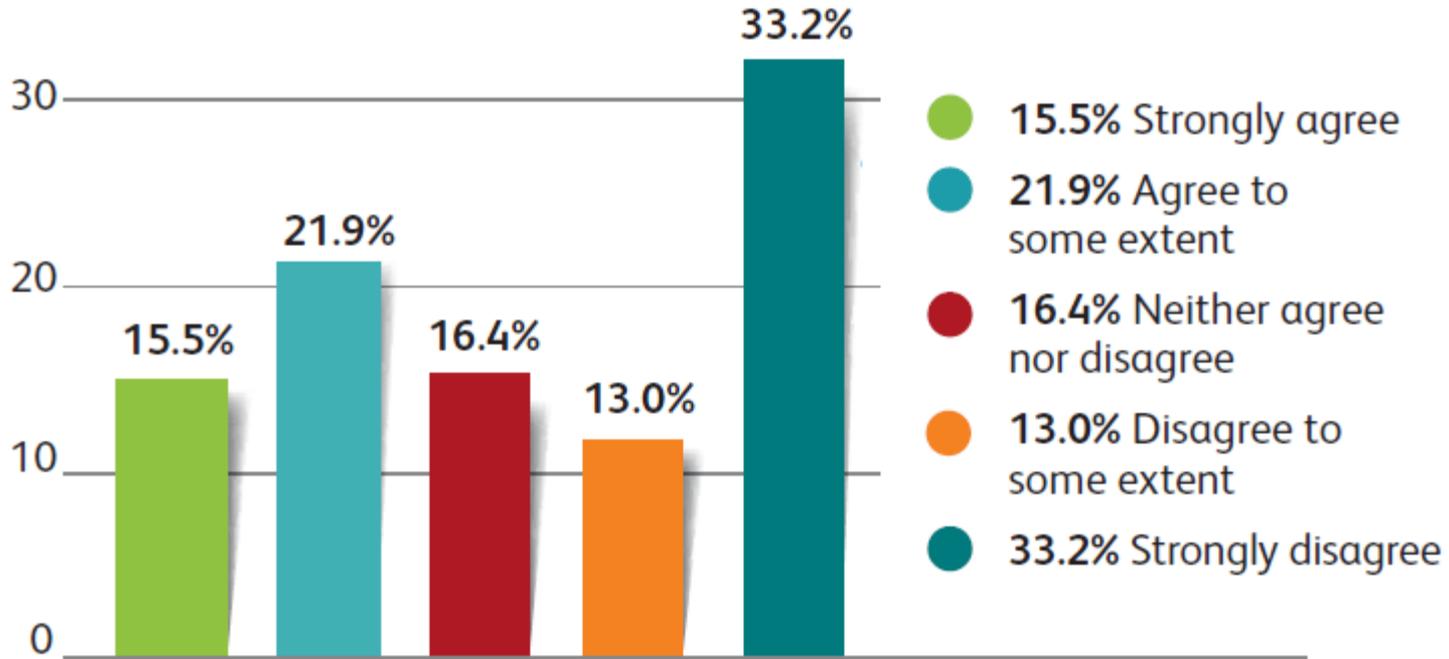
	01 Researching activities, attractions or events	02 Buying tickets to activities, attractions or events	03 Researching hotels or lodging	04 Booking hotel accommodations	05 Researching restaurants	06 Making restaurant reservations
Strongly prefer using a desktop or laptop	50.3%	48.9%	46.4%	47.4%	38.5%	36.0%
Prefer using a desktop or laptop	25.5%	24.0%	25.5%	25.7%	20.7%	19.2%
Neutral - I have no preference	14.4%	18.0%	17.8%	16.7%	23.5%	25.6%
Prefer using a mobile phone	5.7%	5.5%	6.9%	6.8%	12.3%	13.1%
Strongly prefer using a mobile phone	4.1%	2.9%	3.3%	3.4%	5.1%	6.1%
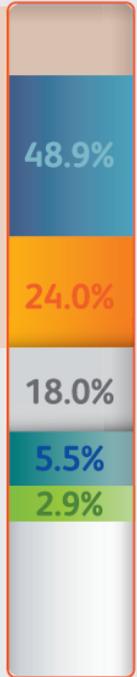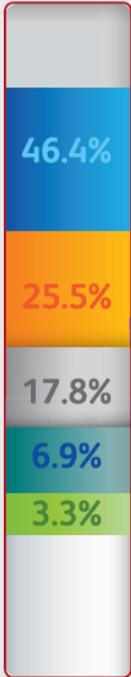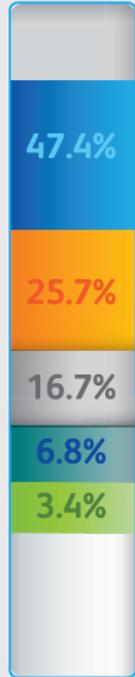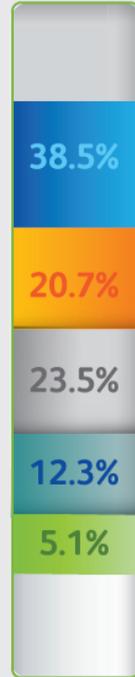
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EXAMPLES & KEY TAKEAWAYS

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4 X Takeaways

1. High Tech & High Touch
2. VR Moves Towards the Mainstream
3. Google's Travel Ambitions
4. Mobile – Next Generation

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1: High Tech – High Touch

Travel is still all about people & relationships

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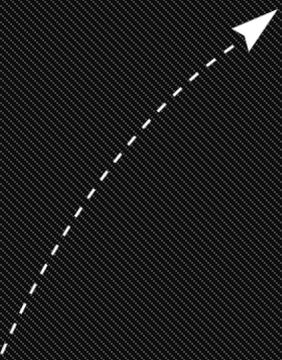
2: VR Moves To Mainstream

VR & AR moves beyond early adopters

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Visit St. Pete-Clearwater debuts virtual reality tours of beaches

Tampa Bay Times

00:40 / 00:45
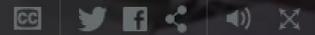
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Visit St. Pete-Clearwater debuts virtual reality tours of beaches

Visit St. Pete-Clearwater Executive Director, David Downing, unveils the tourism agency's new 3-D goggles. The experience allows users to get a 360-view of Pinellas County's beaches and attractions. (June 1, 2015) Video by: Justine Griffin

SOURCE: TAMPA BAY TIMES

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Chris Adams
Director of
Research and
Online Marketing

technology ❯

trends ❯

Virtual Reality Moves Towards the Mainstream

Is it virtual reality's "big moment?" Is VR finally moving from early adopters towards mainstream consumer use? In early November 2015, the *New York Times* launched a major virtual reality storytelling initiative in partnership with Google – including mailing 1.3 million Google Cardboard headsets to its subscribers in the US.

The *New York Times*' first major VR story, The Displaced, plots the journey of three refugees from around the world seeking a new life. The VR experience allows viewers to follow the journey with the ability to look around the locations as a 360-degree immersive experience. That same weekend the *New York Times Magazine* also launched a VR experience, Walking New York. Both are available as a traditional online story (editorial, images, maps) and also as a VR experience.

nytvr   nytvr   ⓘ

Watch these virtual reality videos with
your Google Cardboard viewer for an
immersive experience.

Walking New York

The making of NYTMag's Walking New York cover with

AUSTRALIA

Places to Go   Things to Do   Plan Your Trip
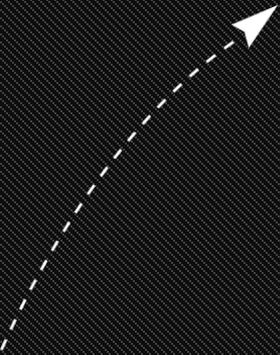
EXPLORE AUSTRALIA IN 360°

It's a place you feel

Vlasoff Cay, Great Barrier Reef, Queensland

Enjoy the Great Barrier Reef from underwater. Snorkel through the secluded Vlasoff Cay and get up close to unique wildlife in a 360° video.

WATCH VIDEO

3: Google's Changes

Curated Content potentially a game changer
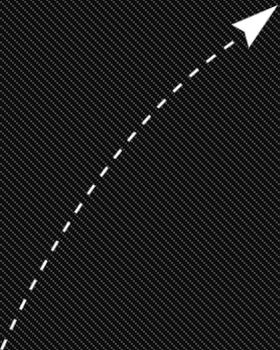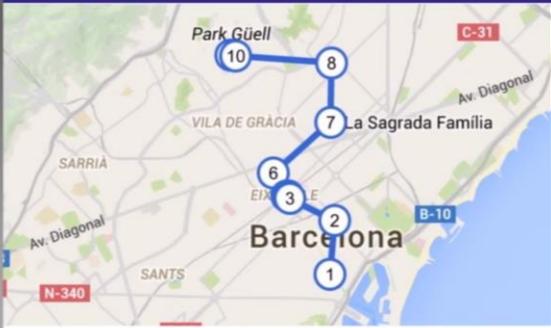
Deep Dive Into Google's Travel Ambitions
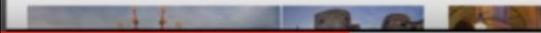
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otes that are
clients and

by Dennis Schaal + Skift Team

How to View Offline

Executive Summary

Google is already the dominant player in travel advertising but now, after four years of acquisitions and product development, the search giant is finally integrating its flight and hotel products. It is also ramping up Book on Google with the goal of making Google a go-to venue for travel

4: Next Generation Mobile

Mobile Travel Planning is Rapidly Evolving

Mobile In Every Part of Travel
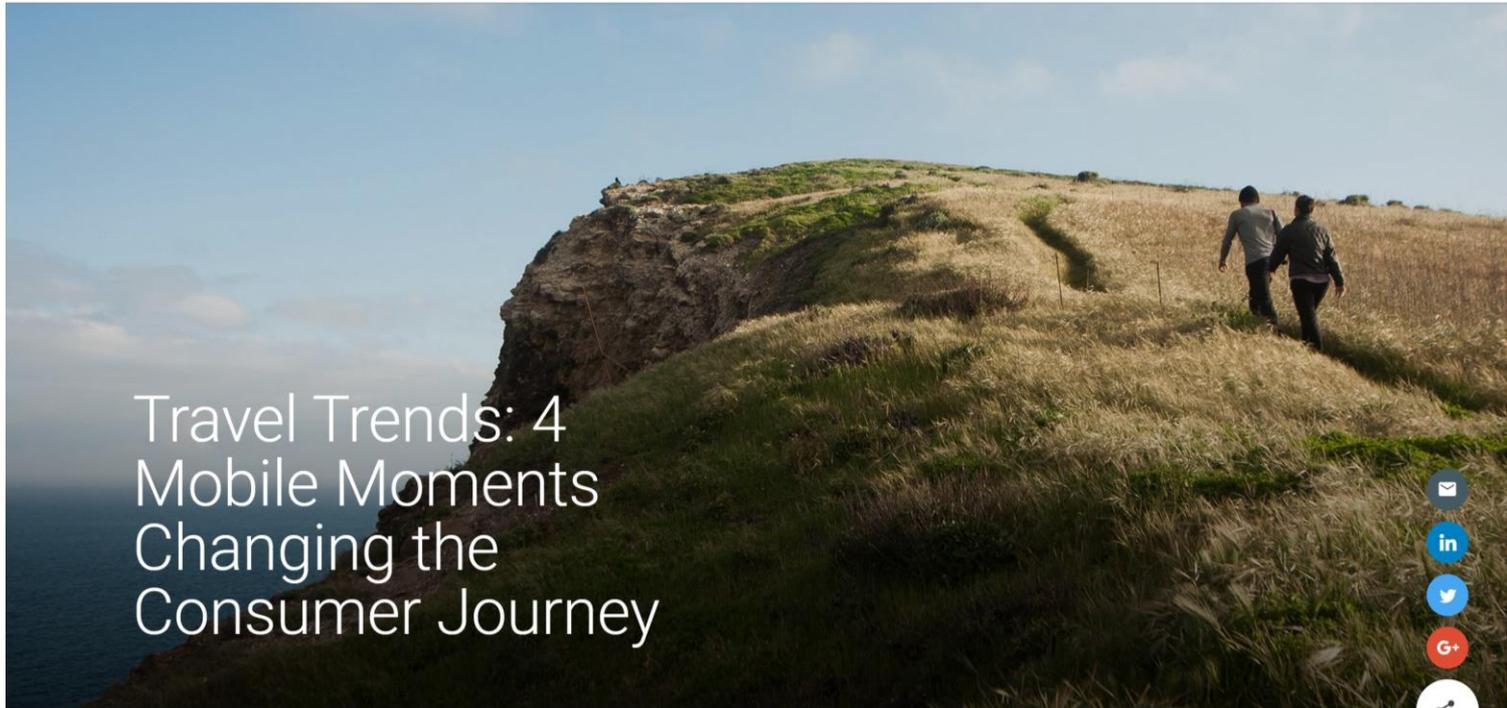
Takeaways: Action This Day

1. High Tech & High Touch
2. VR moving to mainstream – but trade or meetings solution?
3. Google's Ambitions raise the bar for Destinations
4. Mobile First starts with Situation First

Destination ◆ Analysts
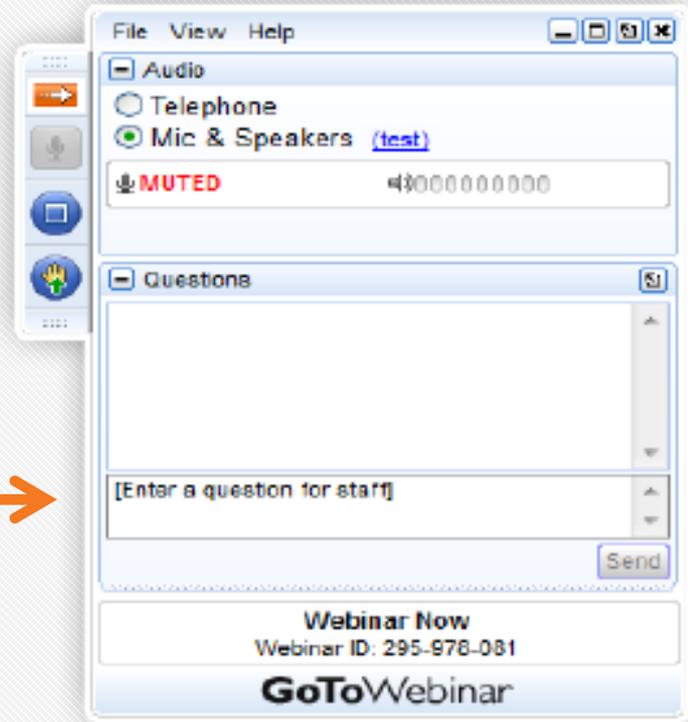
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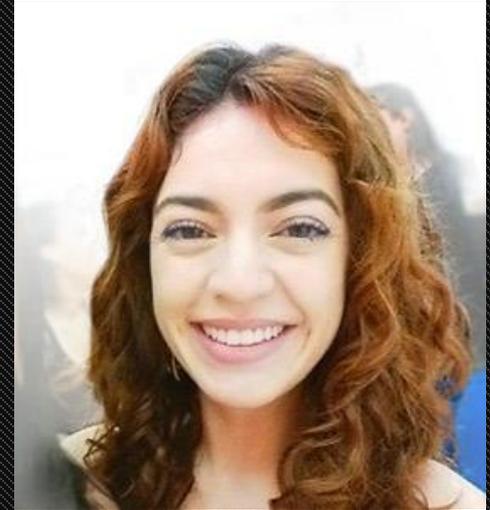
Most Desired U.S. Destinations 2016

Dreaming Vs Searching Vs Booking

What Sojern Sees:

Top US Destinations
For Travel in 2016

Las Vegas 20.3%
New York City 19.1%
Orlando/Disney World 13.0%
Florida 9.3%
San Francisco 8.6%
Chicago 8.1%
Washington DC 7.8%
Los Angeles 7.7%
Hawaii 7.0%
Miami 6.6%
San Diego 5.6%
New Orleans 4.9%

Destination Analysts, Inc. | January 2016

Searched	Booked	
Las Vegas	Las Vegas	1
New York City	New York City	2
Orlando	Chicago	3
Chicago	Orlando	4
San Francisco	Houston	5
Los Angeles	San Francisco	6
New Orleans	San Diego	7
Washington DC	Atlanta	8
San Diego	Washington DC	9
Miami	Los Angeles	10
Boston	New Orleans	11
Atlanta	San Antonio	12

SOJERN

Destination Excitement

Beach destinations and resorts generate the highest level of overall excitement, yet will be visited less than urban (and even small town/rural) destinations.

Destination ◆ Analysts   Destination Analysts, Inc. | January 2016
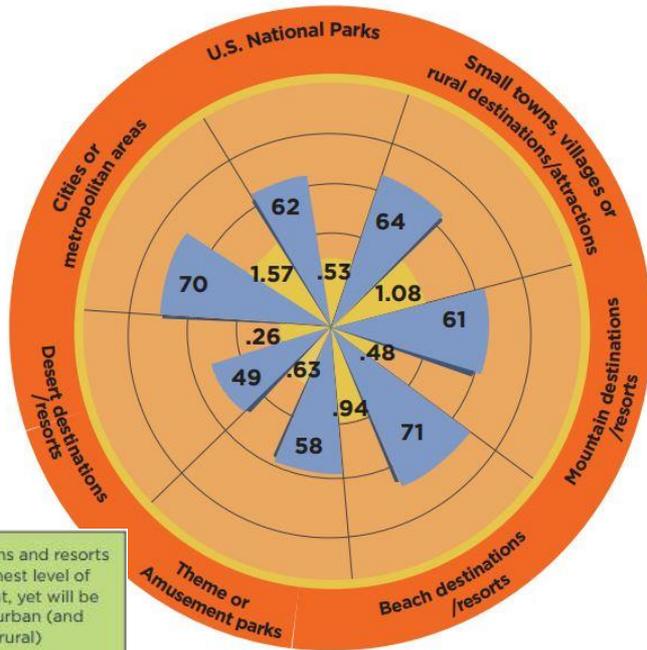
What Sojern Sees:

Of the Top 100 Hotel Destinations Searched for Leisure Travel in 2016:

- 53% are for City Destinations
- 34% are for Beach Destinations
- 18% are for Theme Park Destinations

Cities and metropolitan area continue to reign supreme while beaches still garner a third of top 100 destinations. Theme parks see increased interest during the traveler planning cycle.

SOJERN

Leisure Travel Fun Facts

Dreaming Vs Searching Vs Booking

32% National Parks

About a third of Americans say they will enjoy one of our National Parks this year

Destination **Analysts**   Destination Analysts, Inc. | January 2016

Of the Top 100 searched leisure destinations in 2016, 12% are for National Park destinations.

Of the Top 100 booked leisure destinations in 2016, 6% are for National Park destinations.

Sojern's Leisure Travel Fun Facts

Summer Searching and Booking 2016

53% of the Top 100 searched summer destinations are for Urban/Metropolitan destinations.

29% of the Top 100 searched summer destinations are for Outdoor/Recreational destinations.

But Urban/Metropolitan destinations make up over 70% of the Top 100 booked destinations.

But Outdoor/Recreational destinations but only make up 20% of the Top 100 booked destinations.

SOJERN

miles
marketing destinations

Chris Adams
Director of Research and Online Marketing

Published 5/12/16

Destination

Miles, Destination Ana
ever website conversio

Destination Marketing Org
than ever before. With the
guides and traditional media
consumers than ever before.

At the center of this expan
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But are these millions of use
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stay and visitor spend? In sh
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WEST HOLLYWOOD

FIND PLACE
TO STAY

IN THE HEART OF C

START SEARCHING

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marketing destinations

Published 5/24/16

Mark Sanders
Content Manager

LGBT Tourism: T
Lessons in an E

With ongoing changes in the nation's p
transgender tourism is emerging as a h
community travels frequently, possessi
counterparts. Hotels, Convention & Visi
taken notice, and in the last few years h

In 2015, Community Marketing & Insig
offered suggestions as to where this val

Big cities still matter, bu

The biggest U.S. destinations for gay tra
Angeles and Las Vegas. Washington, DC
as did Orlando and Chicago. Hawaii was

While those vacation spots are no big su
travelers as well, those destinations a li
market may be heading. Nashville, for e
Delaware. These and other towns less tr
push towards inclusiveness nationwide.

The same trend is happening among int
the Caribbean — where conservative so
visitors — and to Latin American countr
gay rights legislation in recent years.

The "sharing economy"
LGBT travelers stay.

travel ›

trends ›

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marketing destinations

Published 5/16/16

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Danica Killelea
Graphic Designer

apps ›

travel ›

My Top Picks: 20 Free Apps for Traveling Anywhere

Summer is here, and that means summer vacation.

If you're one of the many Americans who travel in the summer months, you're probably getting ready to pack a bag and head out of town for a few days. Based on The State of the American Traveler tourism research, travelers are more and more heavily using their mobile devices throughout the travel process. That means that we not only use our devices to start planning a trip, but also use them as we travel. Applications (or Apps) on our devices exist for every kind of need, from predicting traffic conditions to sharing selfies, and are popping up everywhere, allowing us to be ever more connected to the people and places around us.

In tourism-related apps, today you can even buy an international flight and set up an entire itinerary with the use of an app. Imagine what our grandmothers would think if they heard that! Can I go so far as to say that travel apps have become essential to people's lives?

To find my favorite travel apps, I started with a list of the most useful things one needs while traveling. Then I tested a large group of apps, and found the best fit for traveler needs. I've gathered some that will help you plan your trip and find cheap gas during your drive, and others that will give you tips and daytrip ideas for the places you're visiting. I've also made a special note of apps that can be used internationally (marked with "*International use*" at the end of the description, or the globe icon on our accompanying graphic) or are more geared towards international travel, such as currency and language translation (towards the end of the list). I hope you find these apps as useful as I have and, as always, happy travels!

OUR PICK: TRAVEL APPS
20 FREE APPS FOR TRAVELING ANYWHERE

THE NEED

1. Transportation info (air, bus, train)
2. Packing
3. Booking (hotels + B&Bs)
4. Itinerary organization
5. Directions, maps + driving tips
6. Maps of the area
7. Weather
8. Things to do + tours
9. Pictures + photo sharing
10. International (currency, language, phone)

THE APP
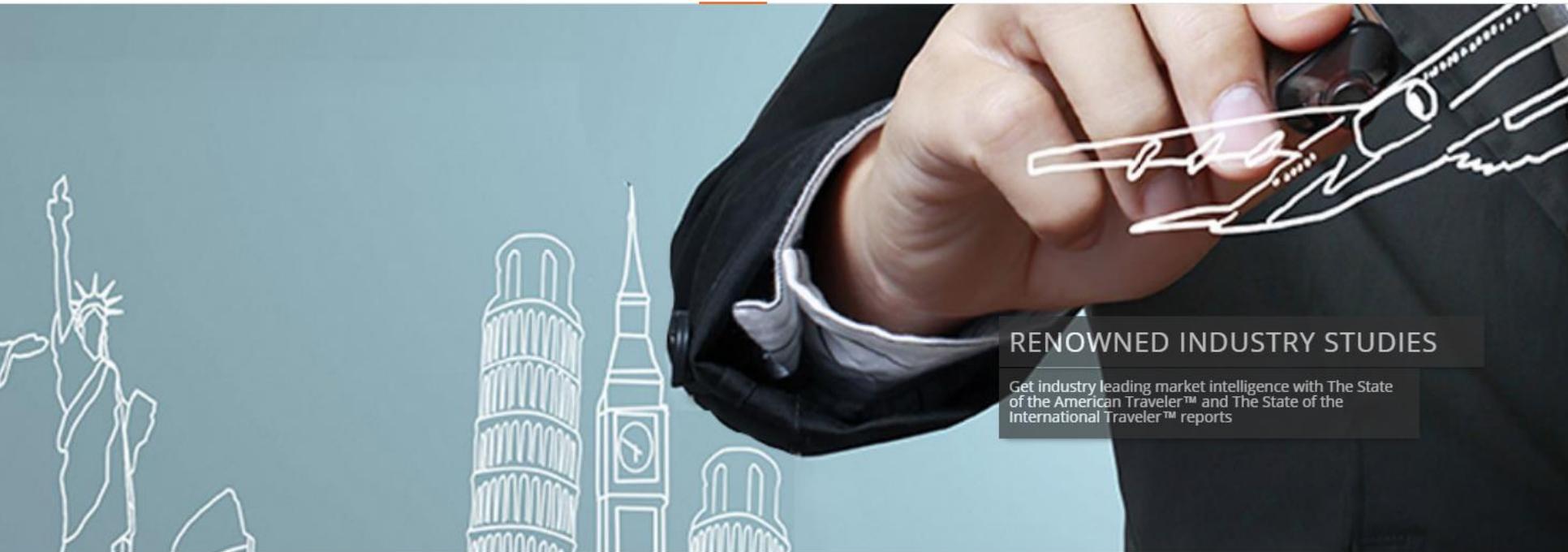
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Thank You

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