

Destination Analysts'

The State of the American Traveler™

TECHNOLOGY & MOBILE EDITION

Spring 2019 | Volume 32



Destination  Analysts

The Technology Edition

THIS EDITION of The State of the American Traveler™ takes a slightly new direction. In the past, we have published a spring technology edition and in the fall a report focusing on the use of mobile devices in travel. Starting with this edition we combine the two, while still tracking the key metrics of both. As always, before exploring these marketing-related topics, the report examines overall trends in traveler optimism, which continue to show weakness. The report then examines changes in Destination Analysts' travel technology

adoption spectrum, and then delves into a variety of newer technological solutions and how travelers use and feel about them. As always, our hope is to provide data that helps the DMO community improve its work. If you have questions or ideas for future survey topics, we welcome you to message us: info@destinationanalysts.com or @DA_Research.

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










@DA_Research

Methodology

THE STATE OF THE AMERICAN TRAVELER SURVEY is conducted quarterly by Destination Analysts, Inc., a San Francisco-based tourism industry research company. The survey is conducted online amongst a nationally representative sample of adult Americans. From April 1st to the April 11th, 2019, surveys were collected from a group of respondents who were then screened by their leisure travel behavior. Only those respondents who had traveled at least once in the past 12 months for purely leisure or personal reasons were interviewed. This travel must have been of at least 50 miles one-way — the standard distance threshold used in the tourism industry to signify that a “trip” has been taken. In total, 2,020 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.3%. 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.

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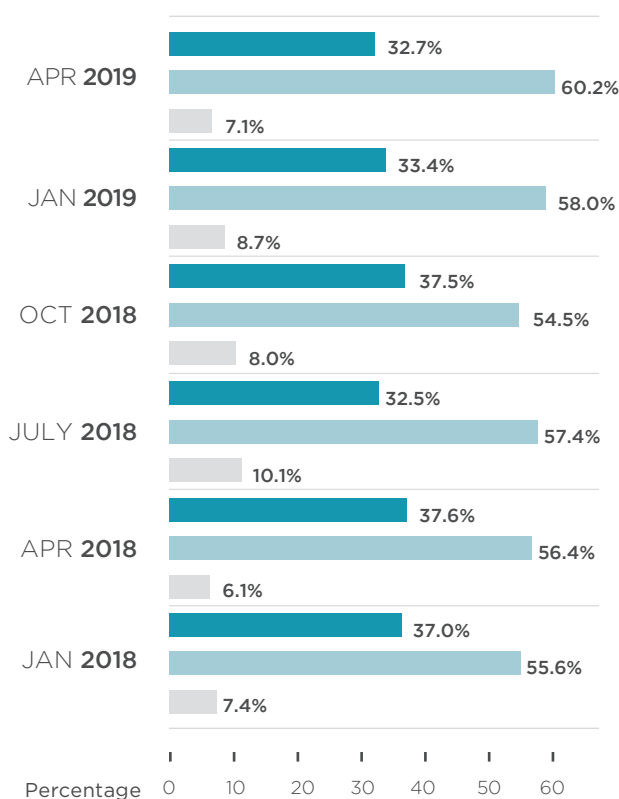
1.0 Travel Expectations & Travel Spending Expectations

AMERICAN LEISURE TRAVEL EXPECTATIONS has continued to weaken from last year. Our recent April

The State of the American Traveler™ tracking survey, shows that 32.7 percent of leisure travelers expect to increase the number of trips they will take this year. This is down from 37.6 percent one year earlier. Leisure travel spending expectations also dropped, with 32.3 percent of American travelers expecting to increase their leisure travel spending in the next year, down from 37.1 percent in April of 2018.

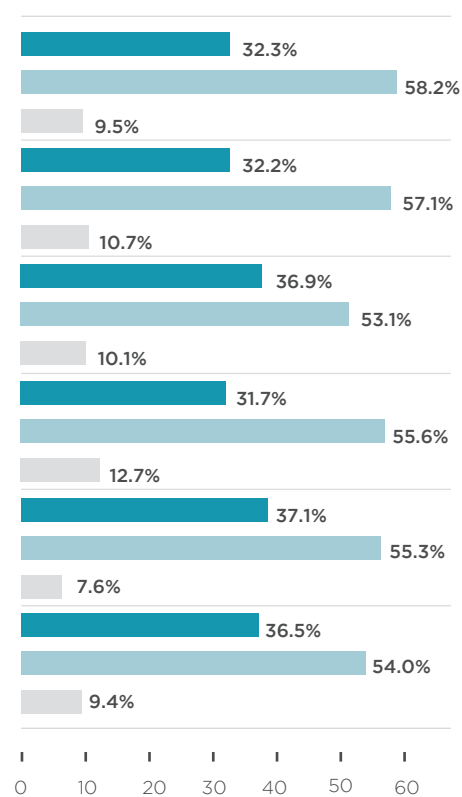
THE KEY: ■ expect more ■ expect the same ■ expect less

Travel Expectations (Trips)



Q: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?

Travel Expectations (Spending)



Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

2.0

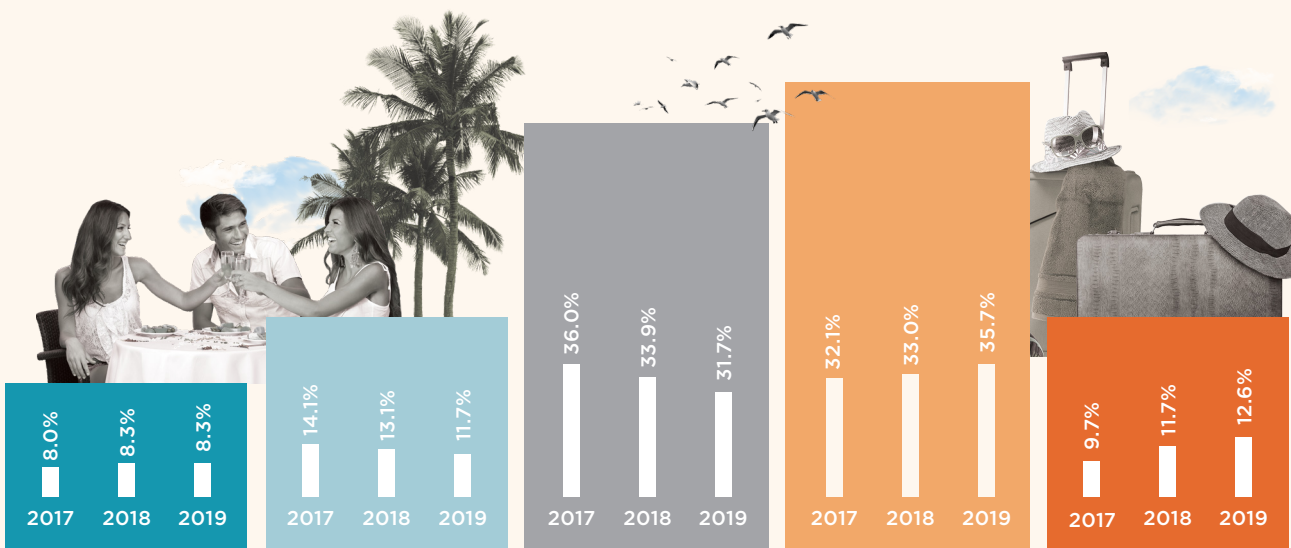
Travel Technology Adoption

This edition marks the fourth year of measuring our proprietary Technology Adoption Spectrum for Travel. This spectrum allocates travelers into one of five segments, based on the speed in which they adopt new technologies into their travel planning.

A detailed set of survey questions is used to develop these segments. Interestingly, the spectrum reveals that in recent years travelers are gradually moving to the higher ends of the spectrum, indicating more comfort with adopting new technologies into their travel planning.

AN EVOLVING LANDSCAPE

Five Segments of Travel Technology Adopters, % of all leisure travelers



INNOVATORS

Quickly adopt new Travel technologies, Innovators are mostly frequent travelers Millennials and Gen-Xers.

EARLY ADOPTERS

Early Adopters enjoy exploring new technologies and do so quickly, but lag somewhat behind Innovators.

EARLY MAJORITY

Interest in and adoption of advanced technologies drops off sharply with this group.

LATE MAJORITY

Skeptical of new technologies, this group is considerably more resistant to change in the way they travel plan.

LAGGARDS

The last to adopt a technical innovation, this groups shows an extremely low propensity to use new technologies for travel planning.



— **GX** = Gen-X or Younger **BB** = Baby Boomer or Older —

Understanding your audience should dictate how quickly marketers integrate advanced technologies into their strategies and budgets. Clearly, more youthful travelers tend to be those using advanced technologies in travel. Nearly all Innovators (96.4%) are Generation X or younger. Meanwhile 82.6% of all laggards are Baby Boomers or older.

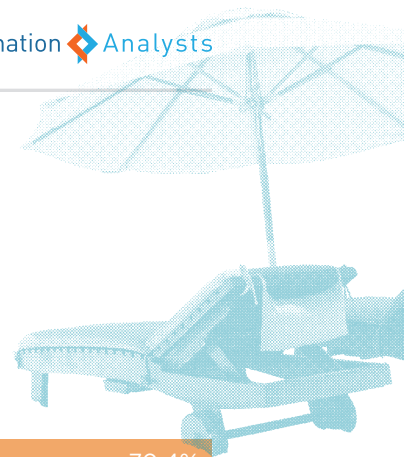
Top Tech

INTEREST & USAGE

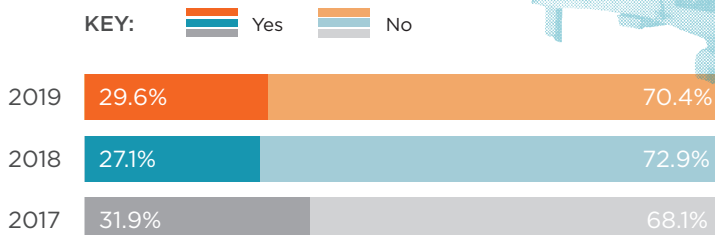


3.1 TOP TECH USAGE

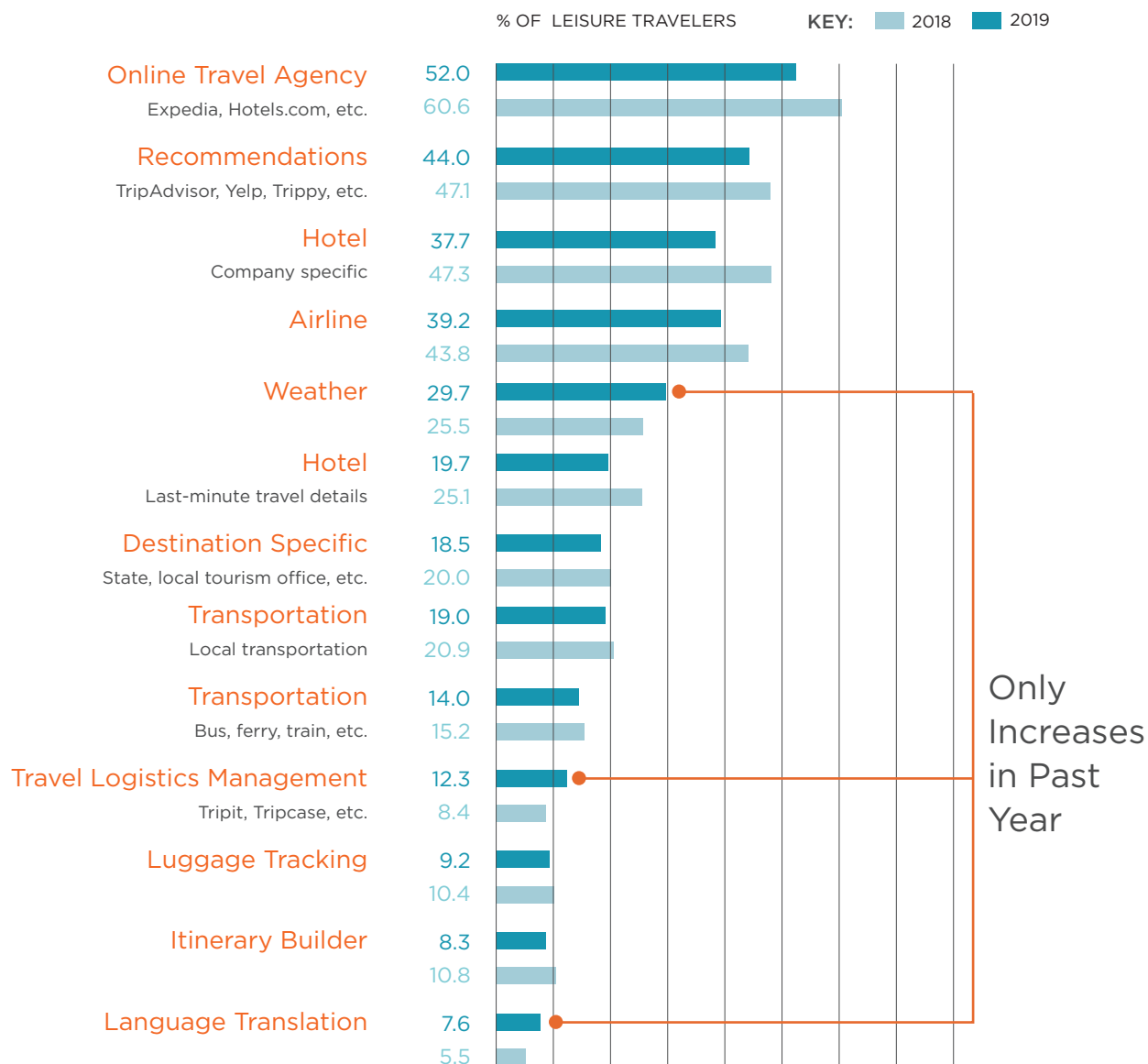
Apps



Q: In the past 12 months, have you used any travel-related apps to help you in travel planning? Select all that you've used.



Q: In the past 12 months, which of these types of apps have you used for travel planning? (Select all that you've used)

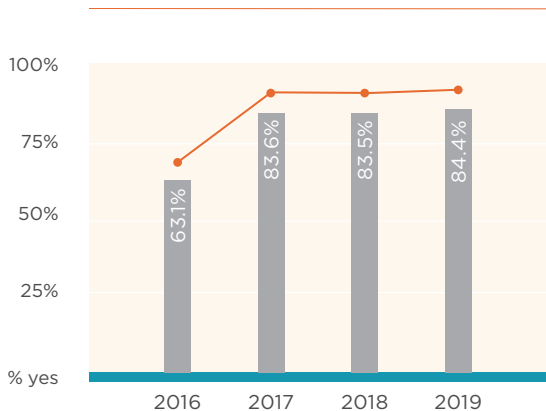


3.2 TOP TECH USAGE

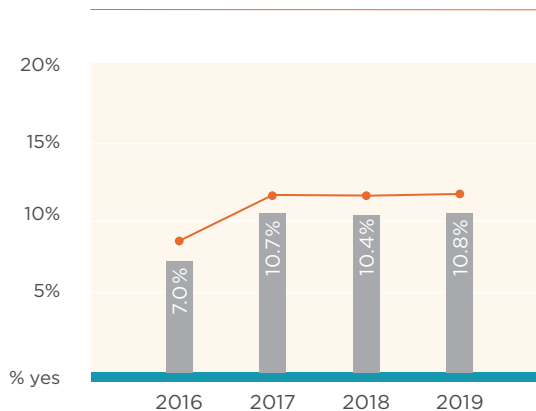
Virtual Reality Headsets

Traveler awareness of (and interest in using) virtual reality headsets has stabilized.

Q: Have you heard of Virtual Reality Headsets before taking this survey?



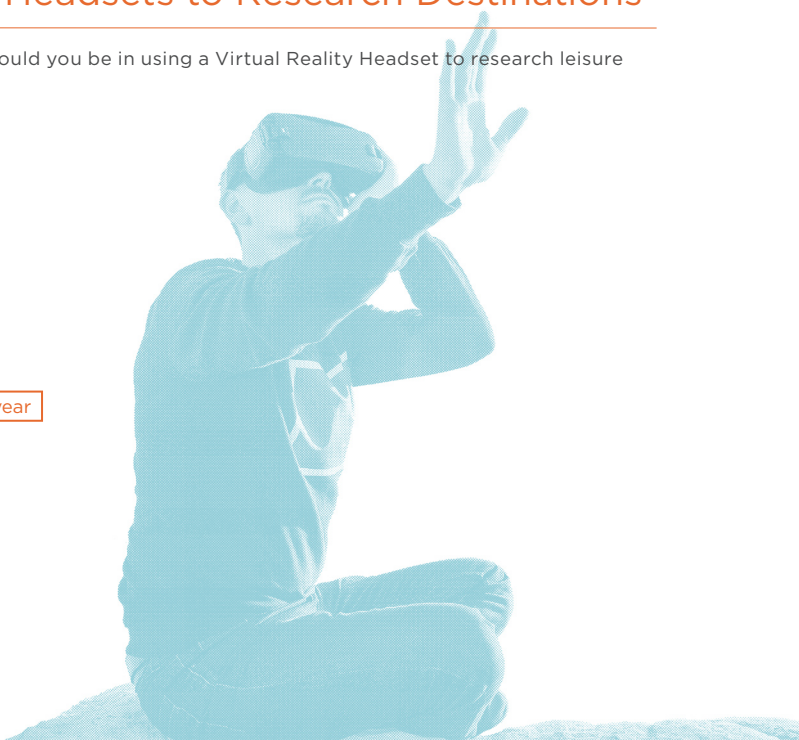
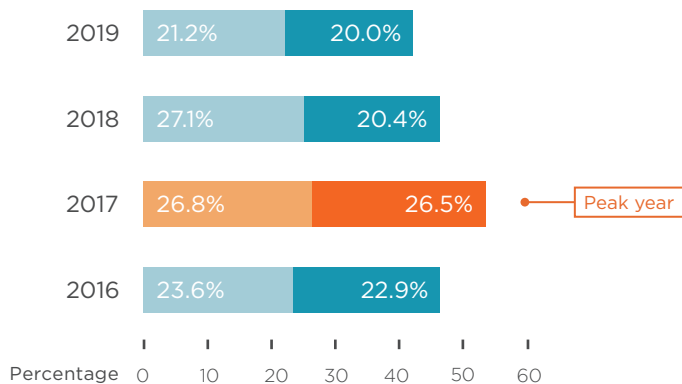
Q: Have you used a Virtual Reality Headset to help plan any leisure travel?



Interest in Using Virtual Reality Headsets to Research Destinations

Q: If good content were available to you, how interested would you be in using a Virtual Reality Headset to research leisure destinations you are considering visiting?

KEY: Interested (light blue), Very Interested (dark blue)

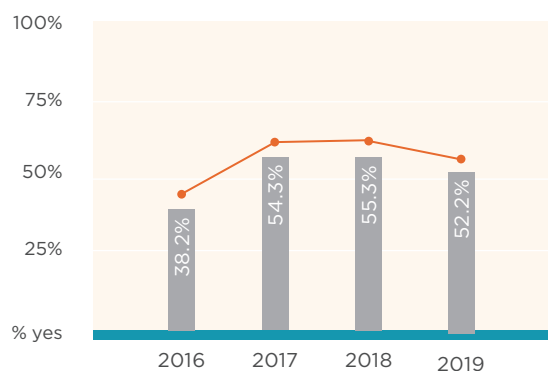


3.3 TOP TECH

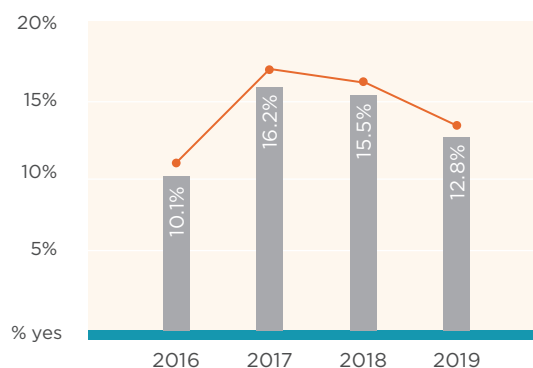
Real Time Video

Real time video feeds have gained little traction in the past two years, with awareness, usage and interest all declining.

Q: Have you heard of Real-Time Video before taking this survey?

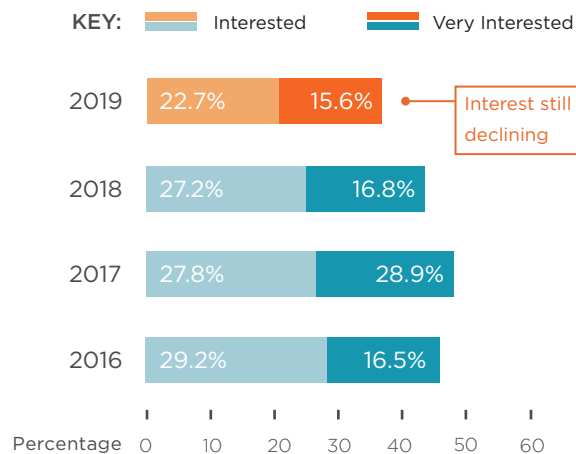


Q: Have you used Real-Time Video to help plan any leisure travel?



Interest in Using Real-Time Video for Research Down Slightly

Q: In general, how interested would you be in using Real-Time Video to research leisure destinations you are considering visiting?



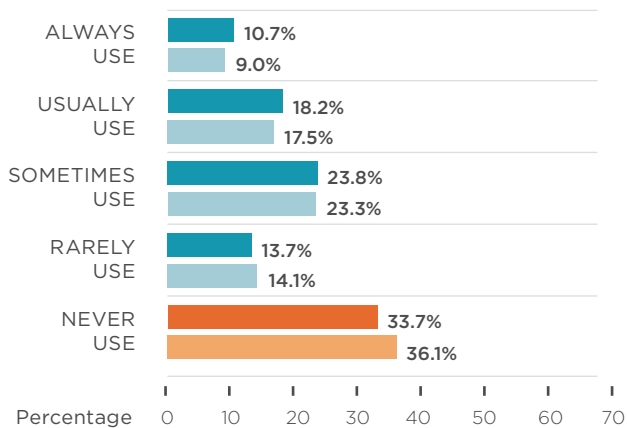
3.4 TOP TECH

Google-Curated Content

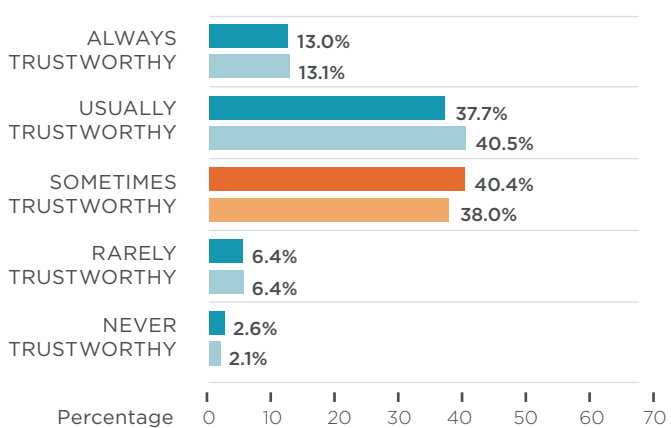
As Google has expanded its role in curating and displaying search result content on travel destinations, traveler trust in it has remained relatively constant over the past several years. The use of Google-curated content as reported by travelers increased slightly this year. Still travelers report having somewhat higher trust in DMO content than Google-curated.

Google-Curated Content vs. DMO Content

Q: How frequently do you use Google-curated destination content to plan your leisure trips?

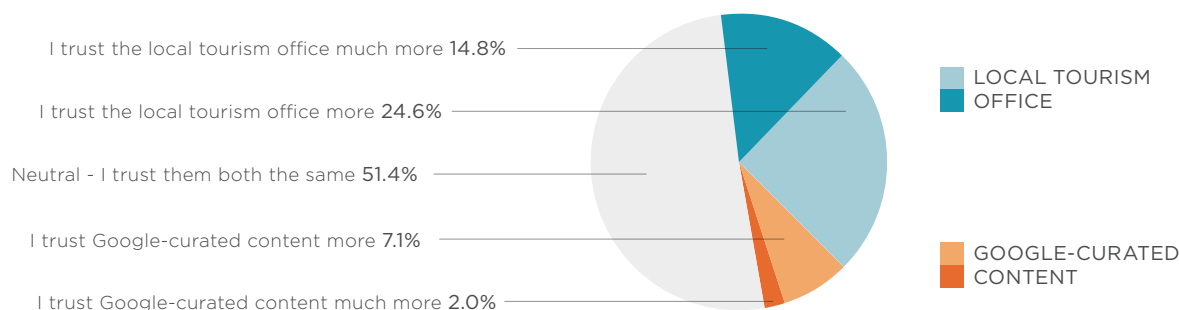


Q: How much would you trust the content, opinions and advice available of Google-curated destination content?



KEY: 2018 (light blue), 2019 (dark blue), Largest Category (orange)

Q: Which content, opinions and advice would you generally trust more? A local visitor bureau/tourism office or Google-curated content?



3.5

TOP TECH

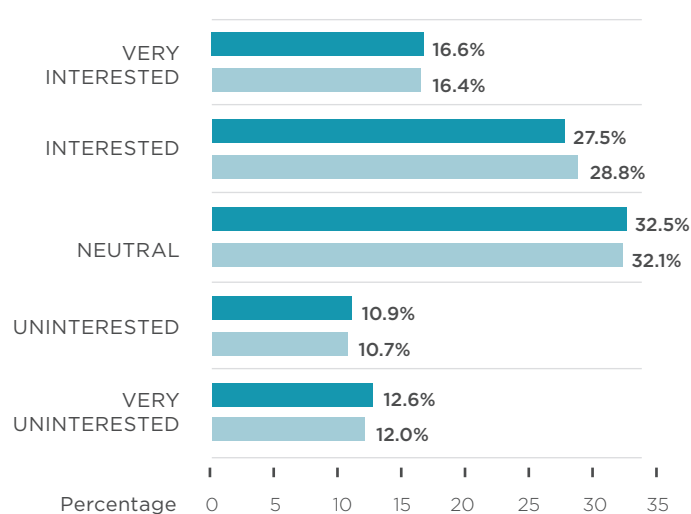
Google Trips App

Use of the Google Trips app reported by travelers dropped slightly this year to about 12 percent.

Q : Have you ever used the Google Trips App?



Interest in using Google Trips APP when traveling

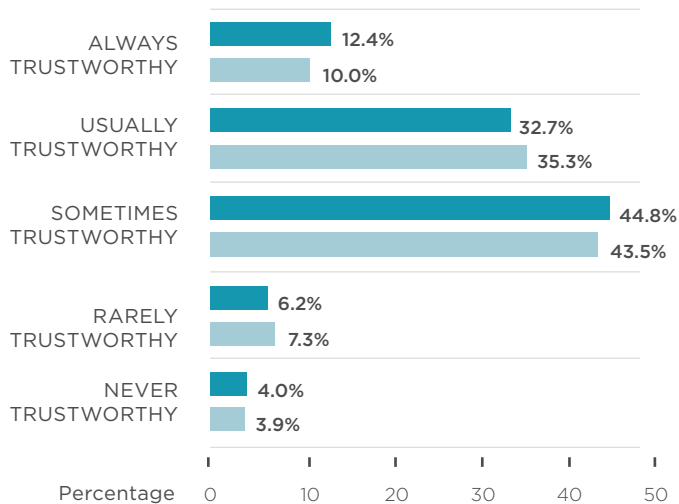


KEY: 2018 2019



Trust in the content, opinions and advice from Google Trips APP

KEY: 2018 2019



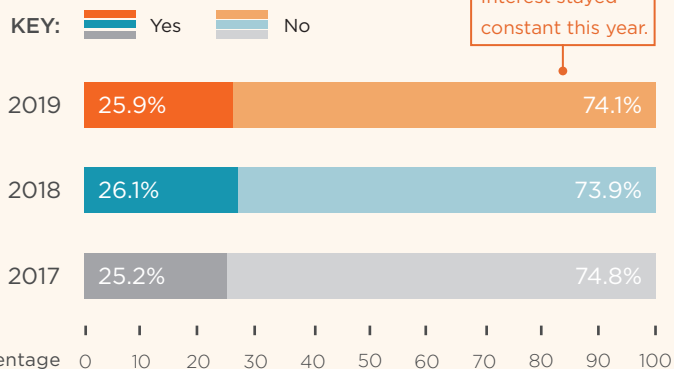
3.6

EMERGING TECH

From voice-activated technologies to messaging apps, travelers are exploring emerging solutions for travel planning.

VOICE-ACTIVATED INTELLIGENT ASSISTANTS

Q : In the past 12 months, have you used any type of Voice-Activated Intelligent Assistant (e.g. Siri, Google Now, or Alexa) in travel planning via your smartphone?



AMAZON ECHO, GOOGLE HOME, MESSAGING APPS, 360 DEGREE VIDEO

These new technologies have remained constant or dropped only slightly this year.



15.7% yes

Q : In the PAST 12 MONTHS, have you used a device like [Amazon Echo](#) or [Google Home](#) for travel planning?

 **STEADY FROM 15.8% IN 2018**

14.7% yes

Q : In the PAST 12 MONTHS, have you used a [Messaging App](#) or [ChatBot](#) solution (using text or voice) to help plan, book or update your leisure travel?

 **DOWN FROM 15.3% IN 2018**

20.5% yes

Q : In the PAST 12 MONTHS, have you viewed a travel-related [360 Degree Video](#) on your computer or smartphone?

 **DOWN FROM 23.3% IN 2018**

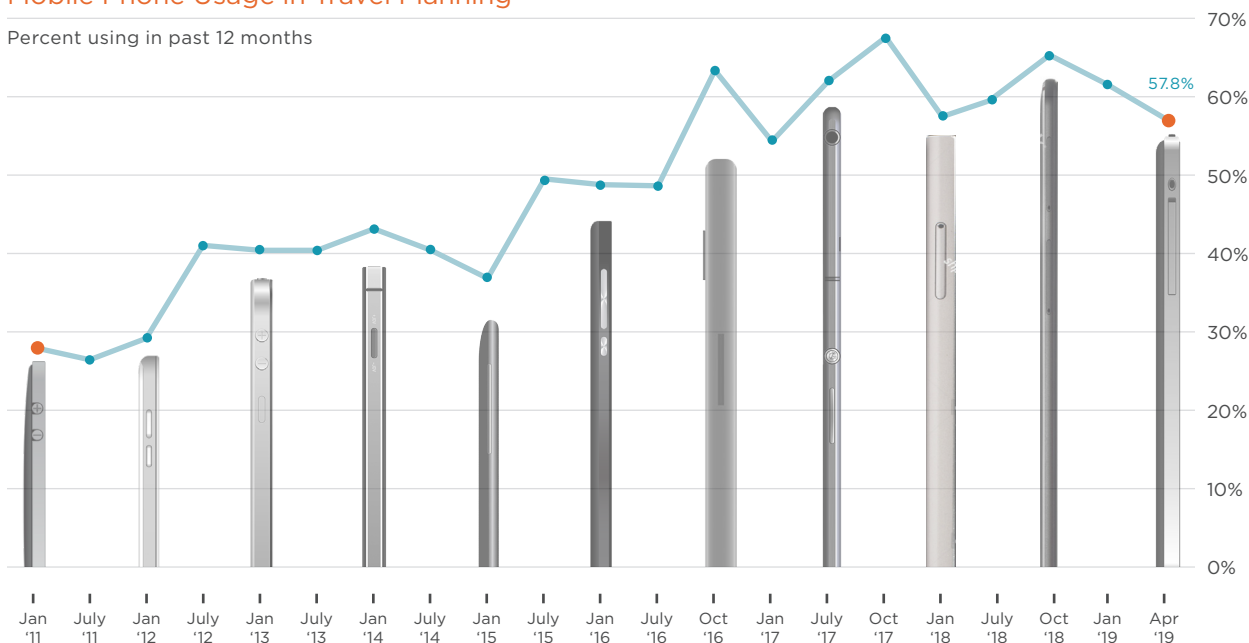
4.0 Going Mobile: Phones & Travel Planning

In recent survey waves the percent of American leisure travelers saying that they have used their mobile devices specifically for travel planning has hovered around 60 percent. This data time series appears to move around somewhat, wave over wave, but clearly use of mobile devices in travel planning has stabilized after its early rapid

growth. A similar portion of travelers (61.0%) report using their mobile devices simply to find inspiration for their trips. When asked how they look for travel inspiration, search engines dominate. The most common way to look for travel inspiration was a general search (69.8%), followed by using a search engine to access travel photos (39.4%).

Mobile Phone Usage in Travel Planning

Percent using in past 12 months

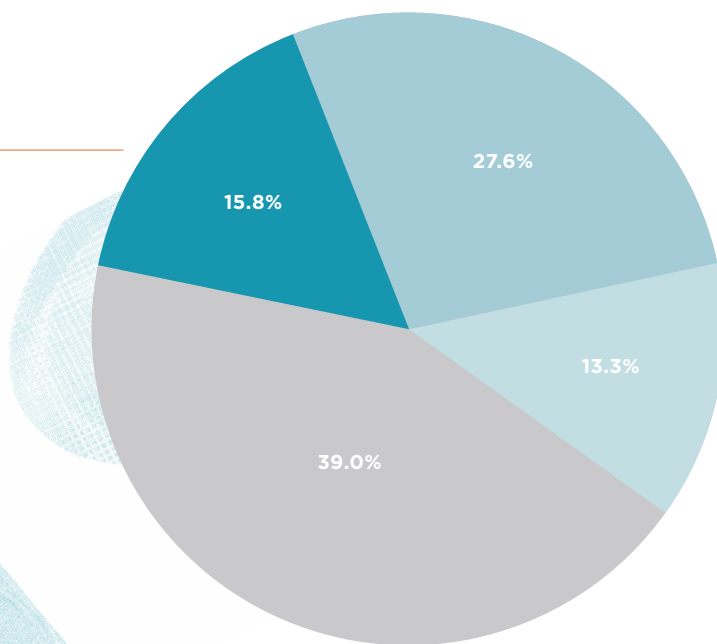


Mobile phones are now being widely used for finding travel inspiration.

Q: Do you ever use your mobile phone to find inspiration and ideas for where to travel for leisure?

- YES, FREQUENTLY
- YES, SOMETIMES
- YES, BUT RARELY
- NO, NEVER

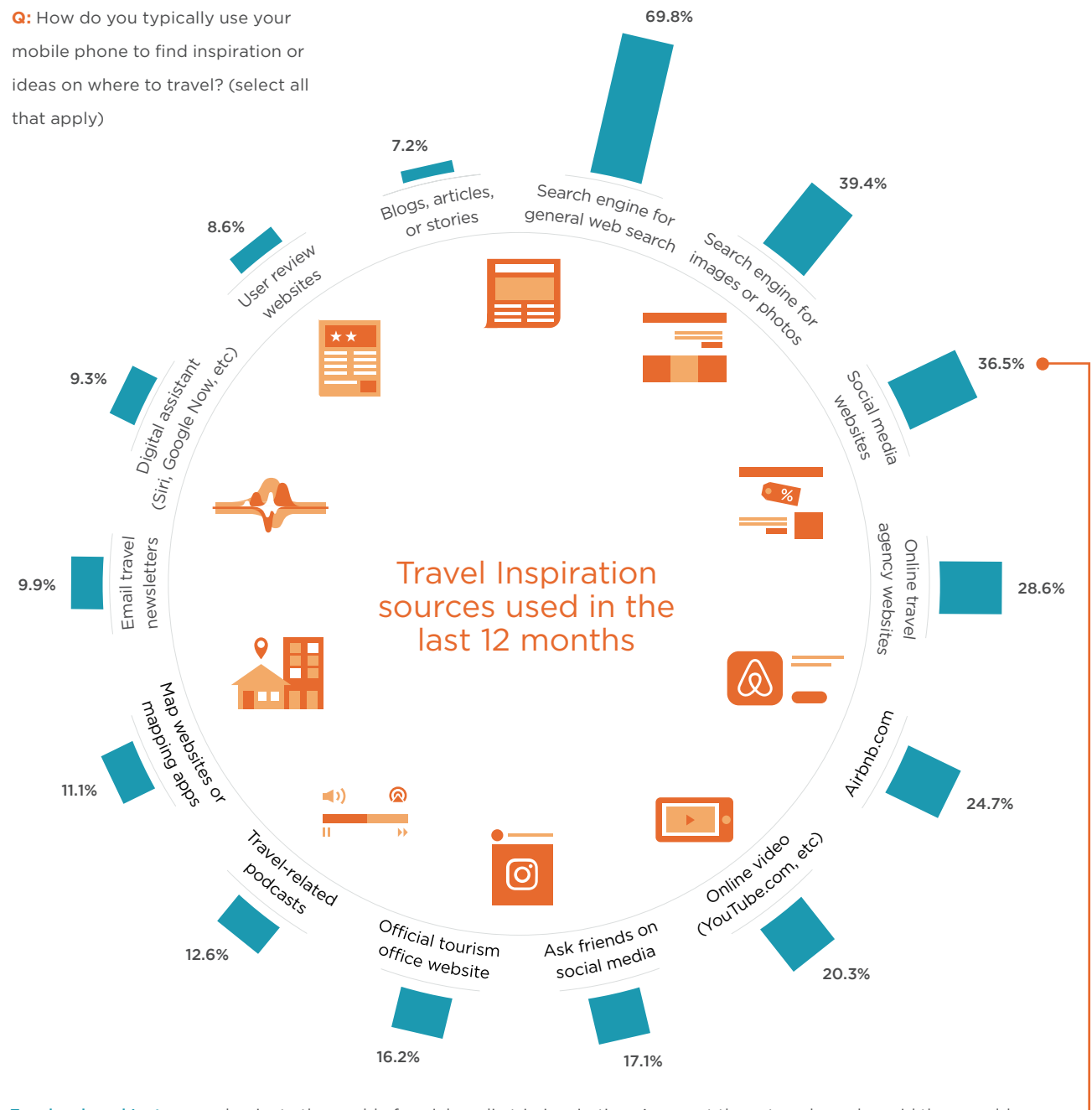
ONLY 39% SAY NO



4.1 Going Mobile: Phones & Travel Planning

Travelers find inspiration on their mobile devices in many ways. However, the most common is naturally a simple search. When asked how they would typically use their mobile device to find inspiration, nearly 70 percent said they would perform a search.

Q: How do you typically use your mobile phone to find inspiration or ideas on where to travel? (select all that apply)




Facebook and Instagram dominate the world of social media trip inspiration. Amongst those travelers who said they would use social media on their phones for trip ideas, nearly 80 percent said they would use Facebook. Still many would use Twitter and Snapchat, selected by 25.8 percent and 21.1 percent, respectively.

Q: Which social media websites do you use to find inspiration and ideas for where to travel for leisure?



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