

THE STATE OF AMERICAN TRAVEL

2018

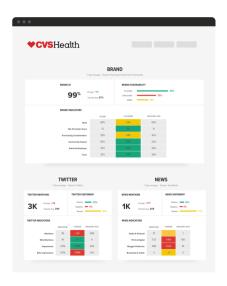
Consumer insights on vacationing, transportation, accommodation, and more

Key Points

- Americans are primarily interested in **relaxing**, **affordable vacations**. The most popular kind of vacation is at the beach, and the most desired domestic destination is Hawaii.
- Younger generations are more likely to want to travel abroad, with 50% of millennials saying they'd rather travel in a different country if money and time weren't an issue.
- In terms of transportation preferences, Americans love getting around by car, and airlines generally lag behind the alternatives.
- The most popular airline in America is Southwest. However, the four largest airlines are neck and neck when it comes to purchasing consideration.
- Most Americans aren't particularly brand loyal when it comes to hotels, with just 24% saying they have preferred chain(s) they often book.
- Airbnb trails major hotel chains in terms of purchasing consideration and brand ID. However opinions among younger generations are a positive signal for the future.

About **Morning** Consult







What consumers THINK

Collecting over 3 million market research interviews



What consumers SAY

Evaluating over 100 million social media posts



What consumers SEE

Analyzing over 85,000 news media outlets

Currently Tracking 1,800+ Brands (200 interviews per day, per brand) **Including A Wide Range of Brands Related to the Travel Industry:**











Agenda



SLIDE / 4

1

Vacation Preferences

Where Americans want to go, what they look for in a vacation, and how they use online reviews.

2

Getting There

Transportation preferences, with a special focus on the airline industry, including a ranking of the most popular airlines.

3

Accommodation

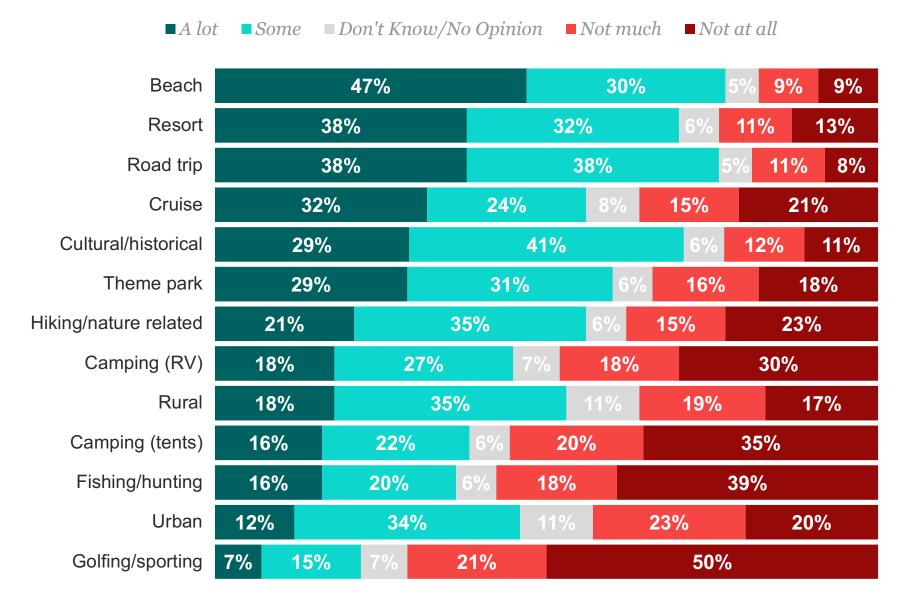
What Americans look for in hotels, the prevalence of Airbnb, and key brand metrics for some of the largest hotel brands in the country.

Beach vacations have the most universal appeal

MORNING CONSULT

SLIDE / 5

How much would you enjoy going on a vacation that included elements of each of the following?



Hawaii and The Grand Canyon top America's most desired vacations

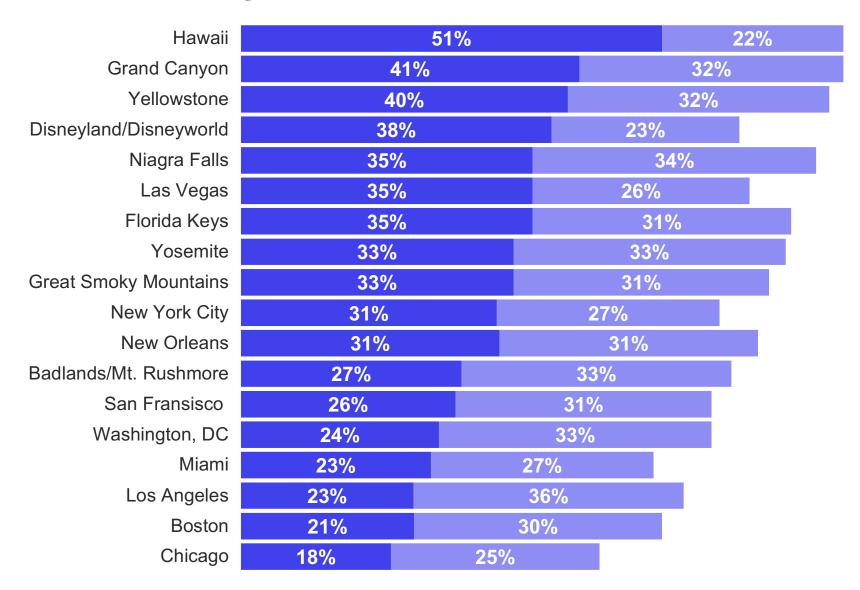
MORNING CONSULT

SLIDE / 6

How interested would you be in visiting the following U.S. vacation destinations?



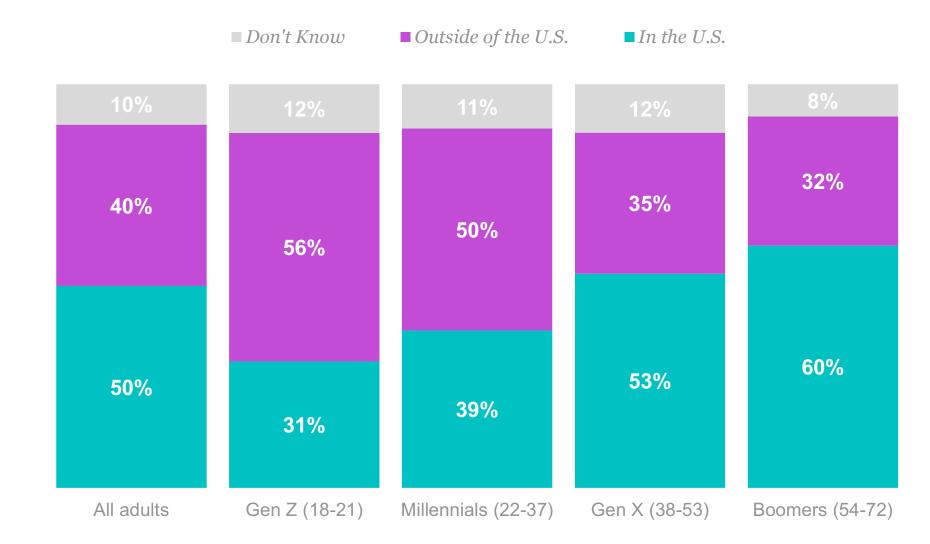




If money and time were not an issue, would you rather take vacation in the U.S. or in a country outside of the U.S.?

Younger Americans are much more likely to want to travel abroad



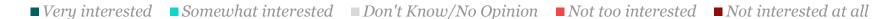


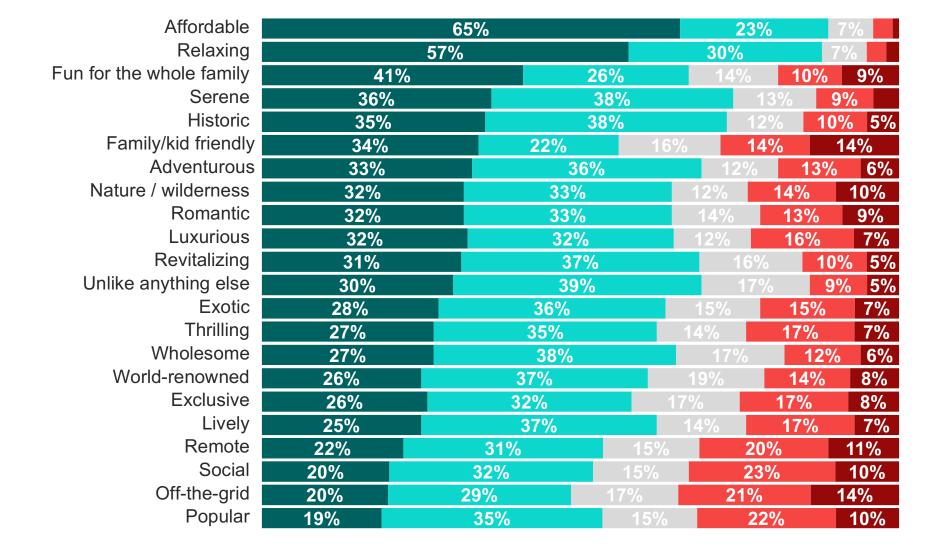
Almost all Americans want vacations to be affordable, relaxing

MORNING CONSULT

SLIDE / 8

Imagine you are reading a description of a vacation destination. If the destination were described using the following terms, would that make you more or less likely to say you want to visit that place?



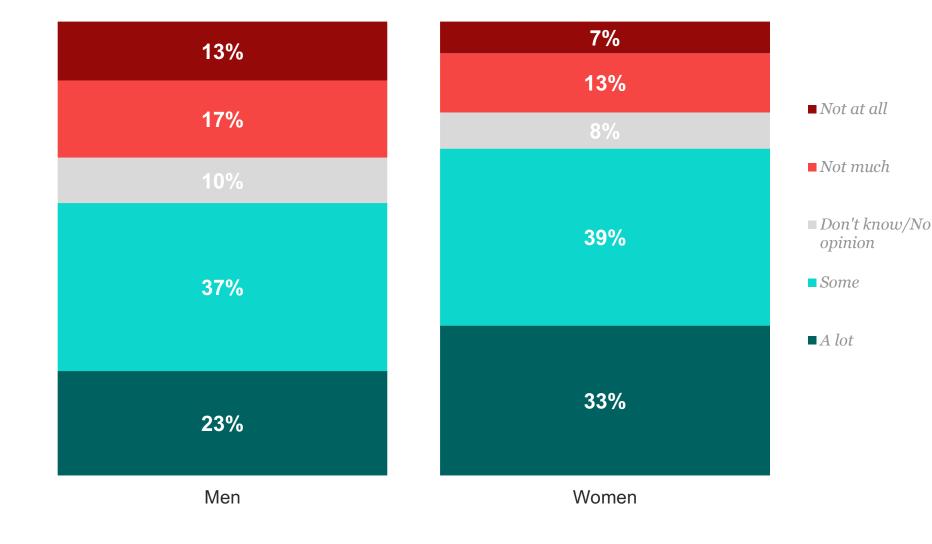


How much do you pay attention to reviews of vacation destinations before booking?

Women are more likely to pay attention to reviews before booking



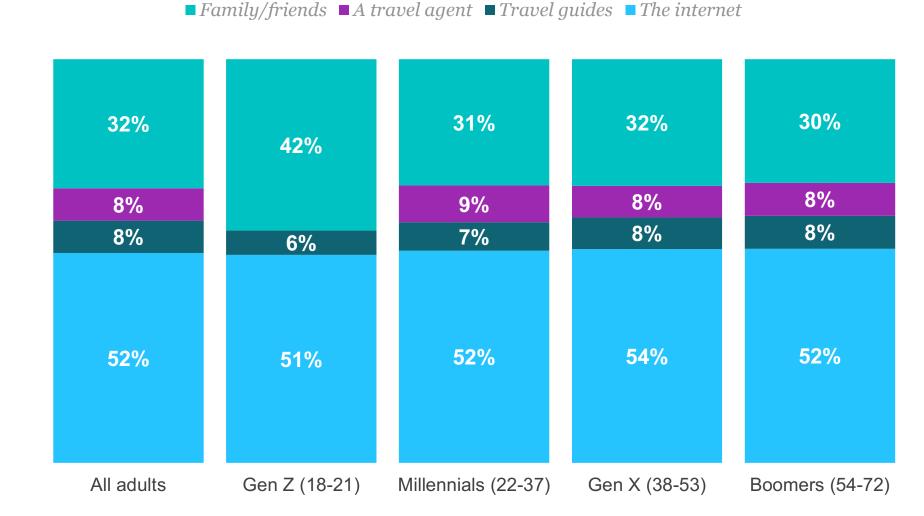
SLIDE / 9



When researching for a vacation, which of the following would you most likely use for recommendations?

Boomers are just as likely as millennials to use the internet to research a vacation





Agenda



1

Vacation Preferences

Where Americans want to go, what they look for in a vacation, and how they use online reviews.

2

Getting There

Transportation preferences, with a special focus on the airline industry, including a ranking of the most popular airlines.

3

Accommodation

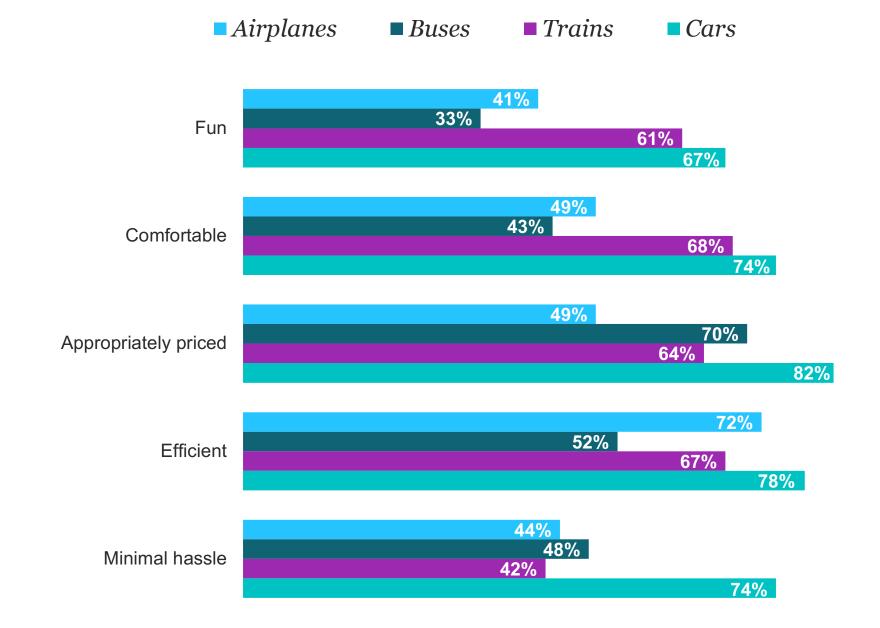
What Americans look for in hotel, the prevalence of Airbnb, and key brand metrics for some of the largest chains in the country.

Across the board, cars are America's preferred mode of travel. Airlines generally lag behind.

MORNING CONSULT

SLIDE / 12

Would you say the following terms apply to travel in ____, or not?



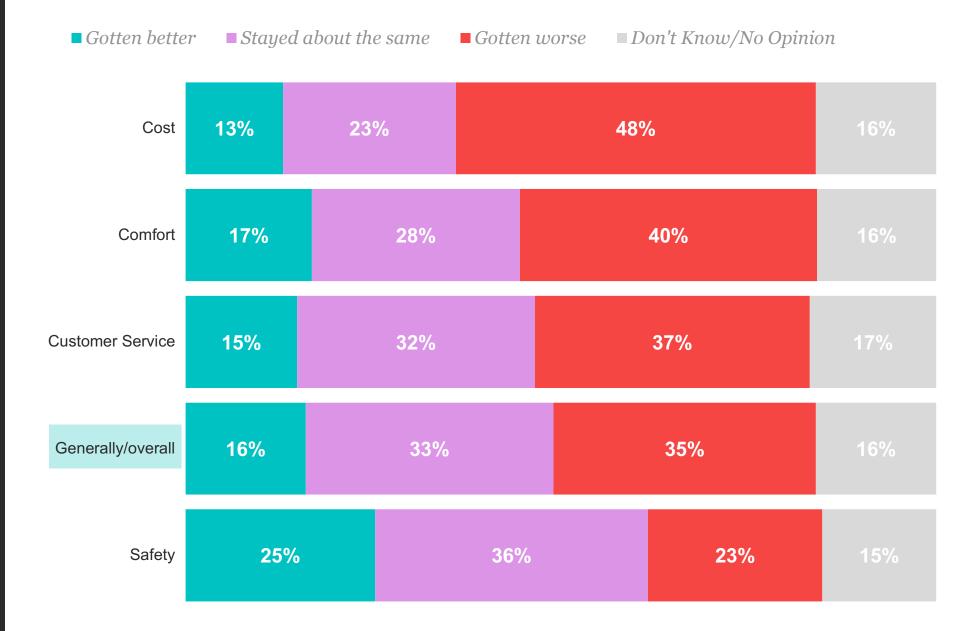
GETTING THERE

Few Americans see improvements in the airline industry

MORNING CONSULT

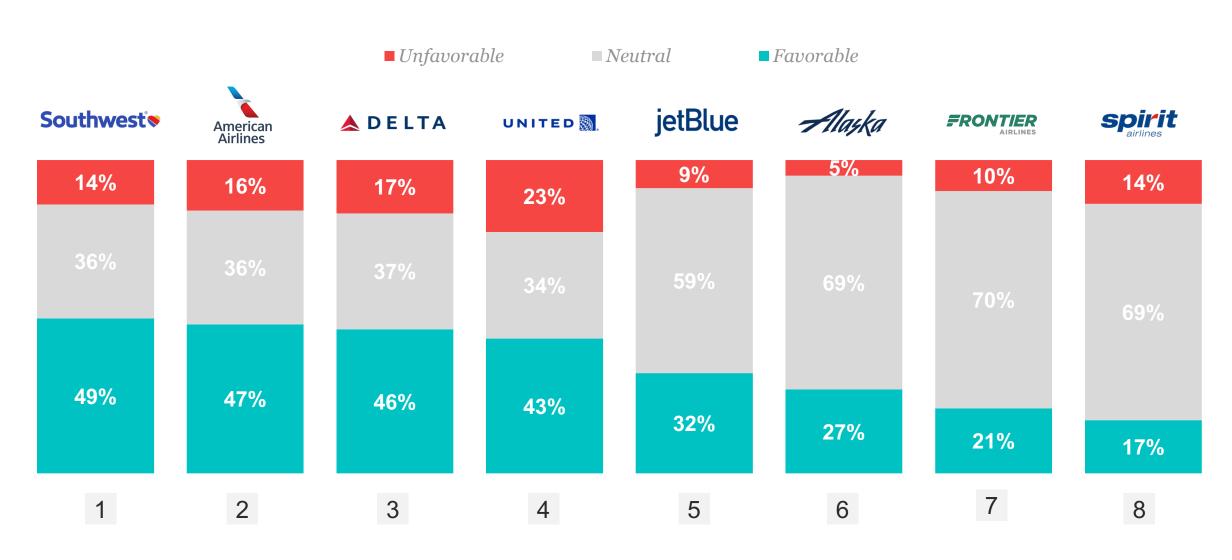
SLIDE / 13

Thinking about the past few years, would you say the airline industry has gotten better or gotten worse when it comes to each of the following?



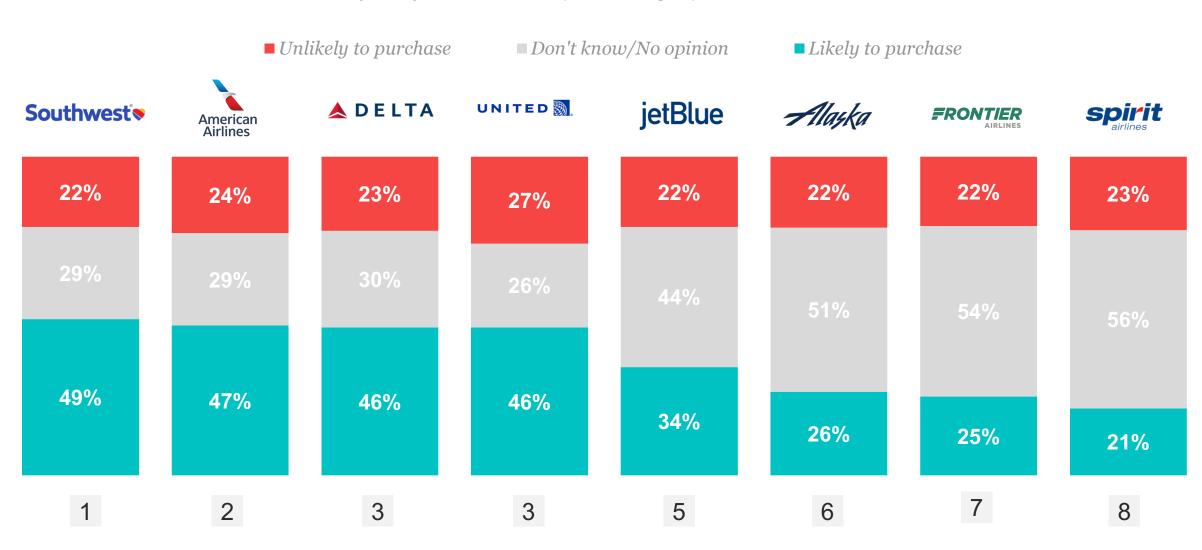
Southwest is the Most Popular American Airline

Do you have a favorable or unfavorable opinion of the following...?



Top Four Airlines in Tight Competition for Purchasing Consideration

How likely are you to consider purchasing a product or service from...?

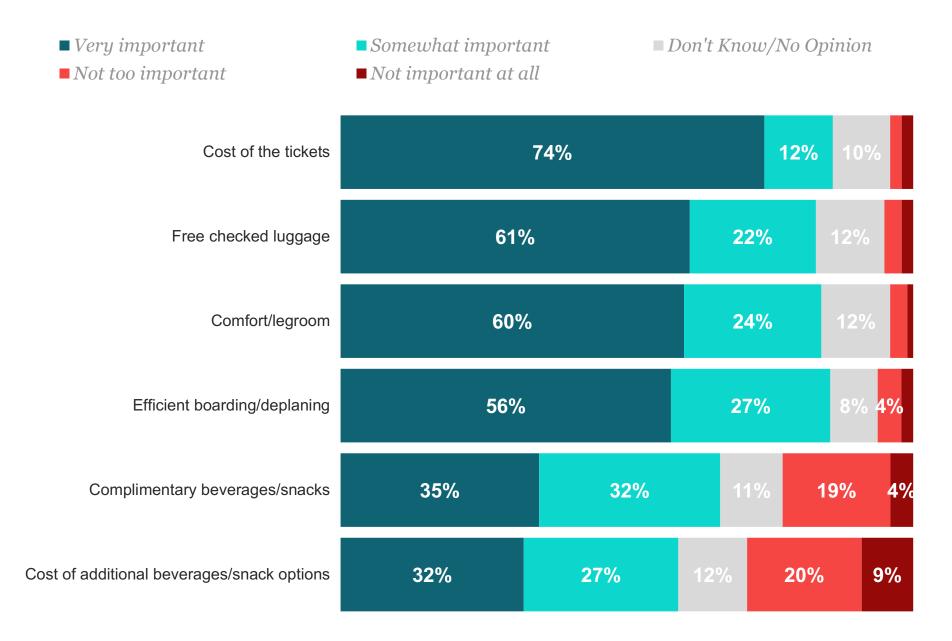


Ticket cost is the most important factor when traveling by plane

MORNING CONSULT

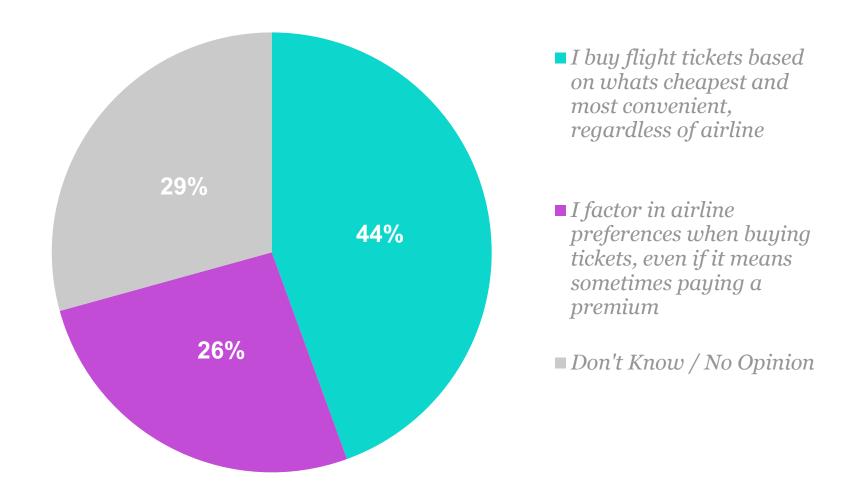
SLIDE / 16

How important are each of the following when it comes to traveling by airplane?



Which of these statements describes you best?

Just a quarter of Americans factor in airline preference if it means paying a premium



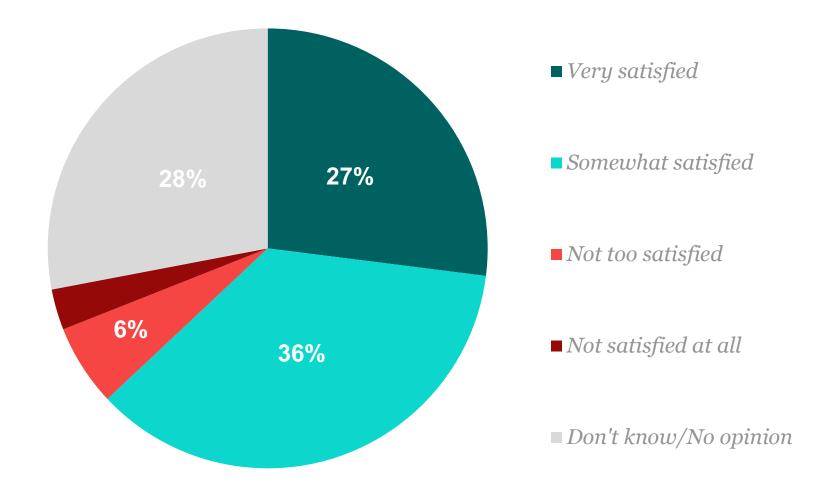
MORNING CONSULT

Most (63%) are satisfied with online flight booking services

MORNING CONSULT

SLIDE / 18

How satisfied are you with online flight booking websites/services?



Agenda



1

Vacation Preferences

Where Americans want to go, what they look for in a vacation, and how they use online reviews.

2

Getting There

Transportation preferences, with a special focus on the airline industry, including a ranking of the most popular airlines.

3

Accommodation

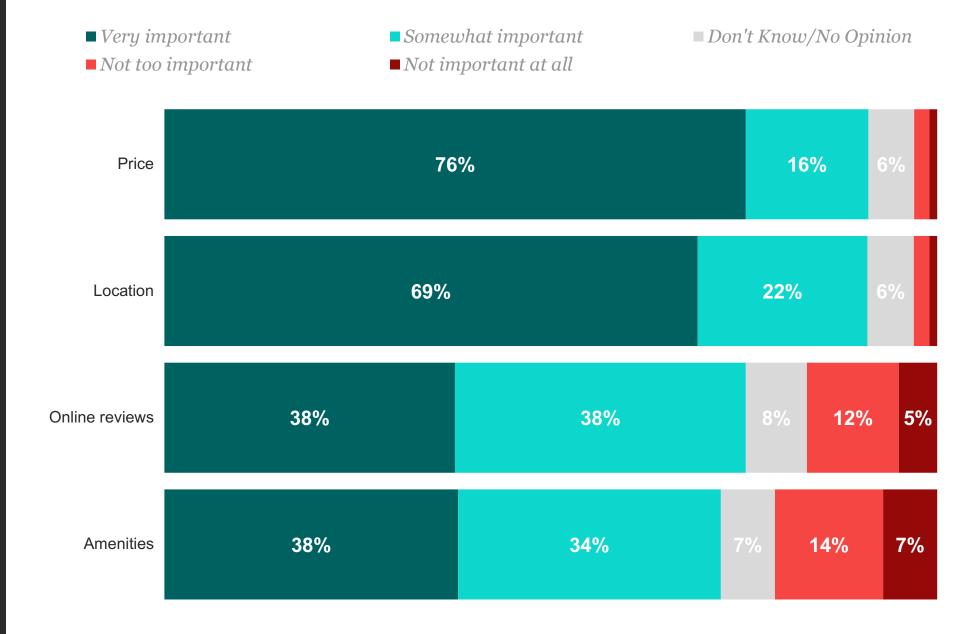
What Americans look for in hotel, the prevalence of Airbnb, and key brand metrics for some of the largest chains in the country.

What Americans look for in a hotel



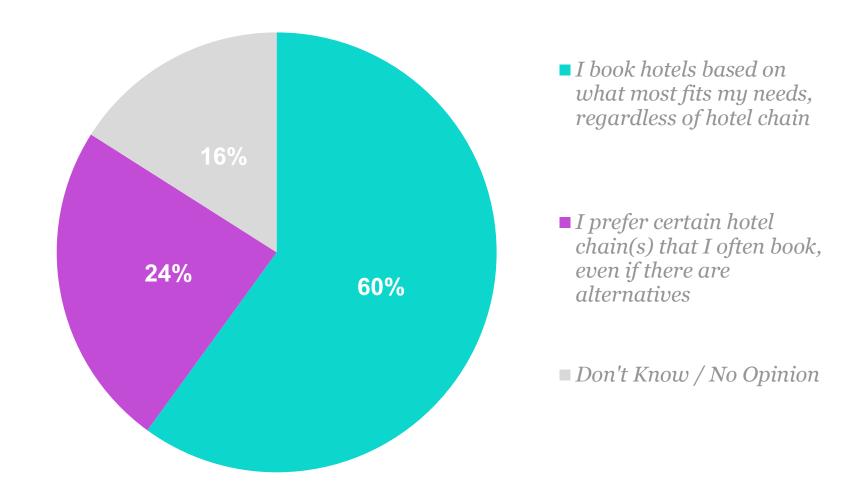
SLIDE / 20

How important are each of the following when deciding on what hotel to stay in?



Which of these statements describes you best?

Most Americans don't pay attention to hotel chain when booking



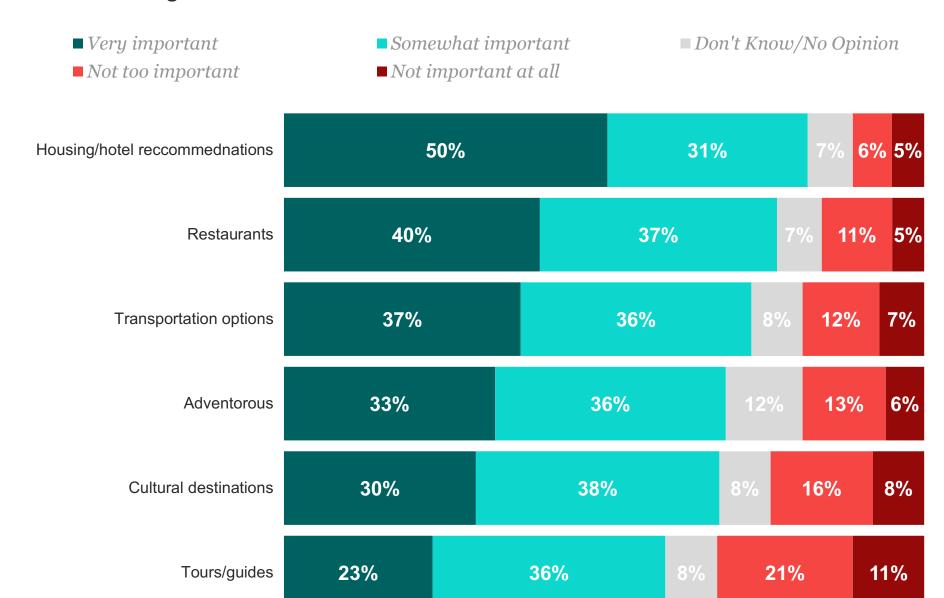
MORNING CONSULT

Online reviews are most important for housing



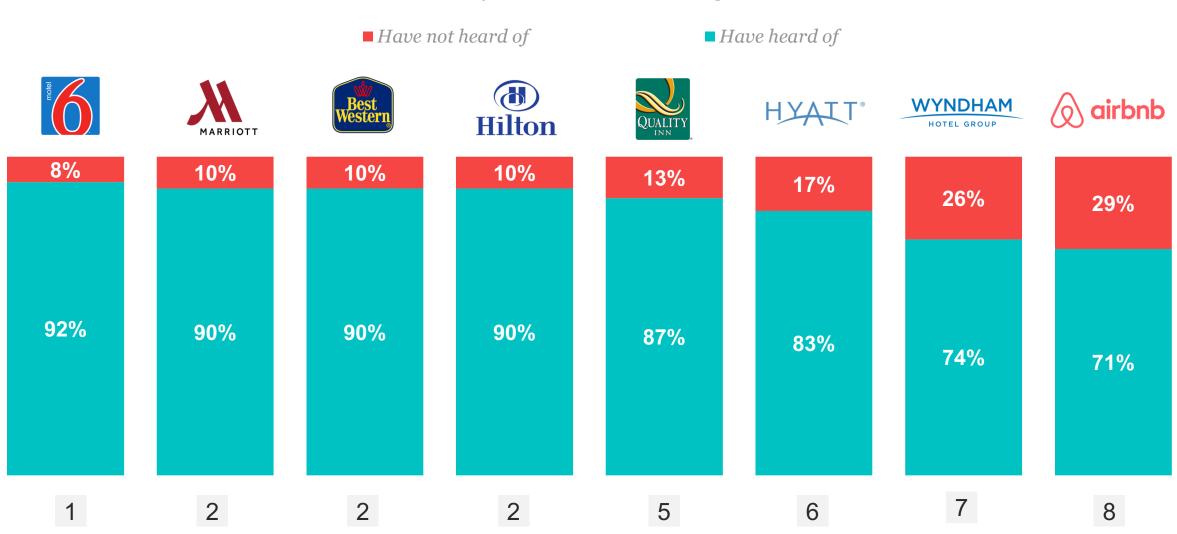
SLIDE / 22

When it comes to planning a vacation, how important are online reviews for each of the following?



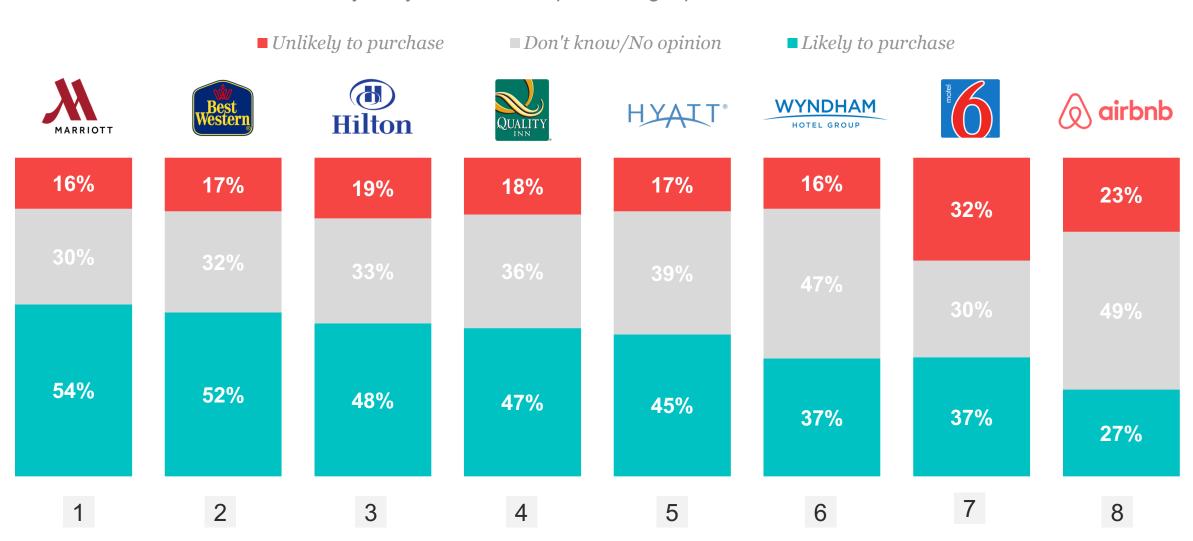
Airbnb Has Yet to Reach The Brand Recognition Levels of Major Hotels

Have you heard of the following...?



Airbnb Also Lags Behind Major Hotels In Terms of Purchasing Consideration

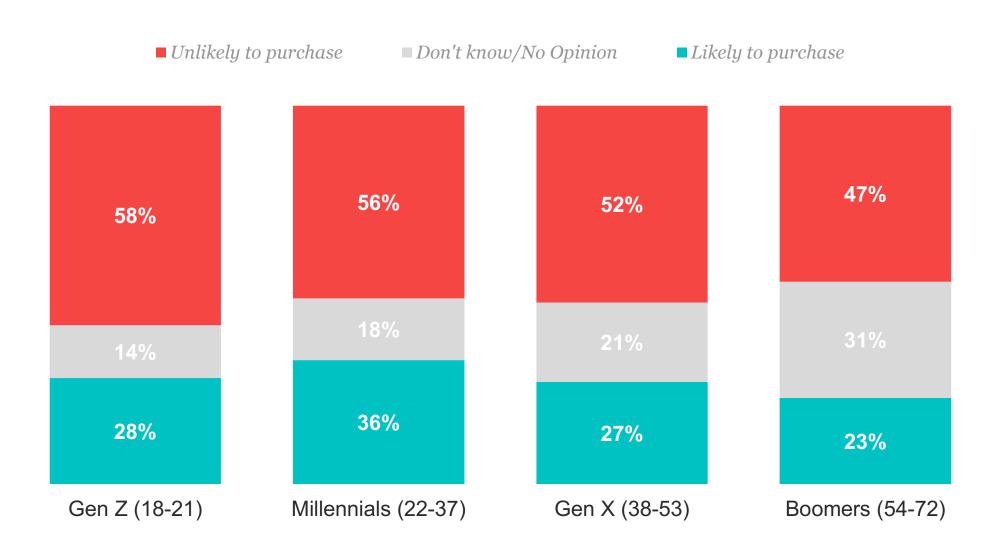
How likely are you to consider purchasing a product or service from...?



MORNING CONSULT BRAND INTELLIGENCE TRACKING

However Younger Americans Have More Interest in Using Airbnb

How likely are you to consider purchasing a product or service from Airbnb in the future?



Methodology

CUSTOM POLLING

This poll was conducted from June 04-05, 2018, among a national sample of 2,202 Adults. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

BRAND INTELLIGENCE TRACKING

On a daily basis, Morning Consult Brand Intelligence surveys Americans on over 1,800 brands and products. The brand tracking data in this report is the result of aggregated daily surveys from May 13, 2018 to June 13, 2018. Each brand was surveyed 6,000 times during that time frame, with the exception of Best Western which was surveyed 2,000 times and Southwest Airlines which was surveyed 16,000 times.

INQURIES

OFFICES

Learn More



Business DevelopmentBD@MorningConsult.com







News Media
Press@MorningConsult.com







SLIDE / 27

