THE STATE OF AMERICAN TRAVEL 2018

Consumer insights on vacationing, transportation, accommodation, and more
1. 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.

2. 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.

3. In terms of transportation preferences, Americans love **getting around by car**, and airlines generally lag behind the alternatives.

4. The **most popular airline in America is Southwest**. However, the four largest airlines are neck and neck when it comes to purchasing consideration.

5. Most Americans **aren’t particularly brand loyal when it comes to hotels**, with just 24% saying they have preferred chain(s) they often book.

6. **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.
Currently Tracking 1,800+ Brands (200 interviews per day, per brand)
Including A Wide Range of Brands Related to the Travel Industry:
Vacation Preferences
Where Americans want to go, what they look for in a vacation, and how they use online reviews.

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

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

- Beach
- Resort
- Road trip
- Cruise
- Cultural/historical
- Theme park
- Hiking/nature related
- Camping (RV)
- Rural
- Camping (tents)
- Fishing/hunting
- Urban
- Golfing/sporting

**Vacation Preferences**

Beach vacations have the most universal appeal.
### How interested would you be in visiting the following U.S. vacation destinations?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Very interested</th>
<th>Somewhat interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hawaii</td>
<td>51%</td>
<td>22%</td>
</tr>
<tr>
<td>Grand Canyon</td>
<td>41%</td>
<td>32%</td>
</tr>
<tr>
<td>Yellowstone</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>Disneyland/Disneyworld</td>
<td>38%</td>
<td>23%</td>
</tr>
<tr>
<td>Niagra Falls</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Yosemite</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Great Smoky Mountains</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td>New York City</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>New Orleans</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Badlands/Mt. Rushmore</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>24%</td>
<td>33%</td>
</tr>
<tr>
<td>Miami</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>23%</td>
<td>36%</td>
</tr>
<tr>
<td>Boston</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Chicago</td>
<td>18%</td>
<td>25%</td>
</tr>
</tbody>
</table>
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.?

**Vacation Preferences**

Younger Americans are much more likely to want to travel abroad.

- **All adults**
  - Don't Know: 10%
  - Outside of the U.S.: 40%
  - In the U.S.: 50%

- **Gen Z (18-21)**
  - Don't Know: 12%
  - Outside of the U.S.: 56%
  - In the U.S.: 31%

- **Millennials (22-37)**
  - Don't Know: 11%
  - Outside of the U.S.: 50%
  - In the U.S.: 39%

- **Gen X (38-53)**
  - Don't Know: 12%
  - Outside of the U.S.: 35%
  - In the U.S.: 53%

- **Boomers (54-72)**
  - Don't Know: 8%
  - Outside of the U.S.: 32%
  - In the U.S.: 60%
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?

- Affordable
- Relaxing
- Fun for the whole family
- Serene
- Historic
- Family/kid friendly
- Adventurous
- Nature / wilderness
- Romantic
- Luxurious
- Revitalizing
- Unlike anything else
- Exotic
- Thrilling
- Wholesome
- World-renowned
- Exclusive
- Lively
- Remote
- Social
- Off-the-grid
- Popular

Almost all Americans want vacations to be affordable, relaxing.
How much do you pay attention to reviews of vacation destinations before booking?

Women are more likely to pay attention to reviews before booking.
When researching for a vacation, which of the following would you most likely use for recommendations?

<table>
<thead>
<tr>
<th>Method</th>
<th>All adults</th>
<th>Gen Z (18-21)</th>
<th>Millennials (22-37)</th>
<th>Gen X (38-53)</th>
<th>Boomers (54-72)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family/friends</td>
<td>52%</td>
<td>51%</td>
<td>52%</td>
<td>54%</td>
<td>52%</td>
</tr>
<tr>
<td>A travel agent</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Travel guides</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>The internet</td>
<td>32%</td>
<td>42%</td>
<td>31%</td>
<td>32%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Boomers are just as likely as millennials to use the internet to research a vacation.
**Vacation Preferences**
Where Americans want to go, what they look for in a vacation, and how they use online reviews.

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

**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.

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

<table>
<thead>
<tr>
<th>Term</th>
<th>Airplanes</th>
<th>Buses</th>
<th>Trains</th>
<th>Cars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fun</td>
<td>41%</td>
<td>33%</td>
<td>61%</td>
<td>67%</td>
</tr>
<tr>
<td>Comfortable</td>
<td>49%</td>
<td>43%</td>
<td>68%</td>
<td>74%</td>
</tr>
<tr>
<td>Appropriately priced</td>
<td>49%</td>
<td>49%</td>
<td>70%</td>
<td>82%</td>
</tr>
<tr>
<td>Efficient</td>
<td>52%</td>
<td>52%</td>
<td>67%</td>
<td>78%</td>
</tr>
<tr>
<td>Minimal hassle</td>
<td>44%</td>
<td>48%</td>
<td>42%</td>
<td>74%</td>
</tr>
</tbody>
</table>
Few Americans see improvements in the airline industry
Southwest is the Most Popular American Airline

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

- **Southwest**
  - Favorable: 49%
  - Neutral: 36%
  - Unfavorable: 14%

- **American Airlines**
  - Favorable: 47%
  - Neutral: 36%
  - Unfavorable: 16%

- **Delta**
  - Favorable: 46%
  - Neutral: 37%
  - Unfavorable: 17%

- **United**
  - Favorable: 43%
  - Neutral: 34%
  - Unfavorable: 23%

- **JetBlue**
  - Favorable: 32%
  - Neutral: 59%
  - Unfavorable: 9%

- **Alaska**
  - Favorable: 27%
  - Neutral: 69%
  - Unfavorable: 5%

- **Frontier**
  - Favorable: 21%
  - Neutral: 70%
  - Unfavorable: 10%

- **Spirit**
  - Favorable: 17%
  - Neutral: 69%
  - Unfavorable: 14%
Top Four Airlines in Tight Competition for Purchasing Consideration

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

- Unlikely to purchase
- Don't know/No opinion
- Likely to purchase

Southwest: 22% likely, 29% unlikely, 49% don't know/no opinion
American Airlines: 24% likely, 29% unlikely, 47% don't know/no opinion
Delta: 23% likely, 30% unlikely, 46% don't know/no opinion
United: 27% likely, 26% unlikely, 46% don't know/no opinion
JetBlue: 22% likely, 44% unlikely, 34% don't know/no opinion
Alaska: 22% likely, 51% unlikely, 26% don't know/no opinion
Frontier Airlines: 22% likely, 54% unlikely, 25% don't know/no opinion
Spirit Airlines: 23% likely, 56% unlikely, 21% don't know/no opinion
How important are each of the following when it comes to traveling by airplane?

- **Ticket cost**: 74% Very important, 12% Somewhat important, 10% Don’t Know/No Opinion
- **Free checked luggage**: 61% Very important, 22% Somewhat important, 12% Don’t Know/No Opinion
- **Comfort/legroom**: 60% Very important, 24% Somewhat important, 12% Don’t Know/No Opinion
- **Efficient boarding/deplaning**: 56% Very important, 27% Somewhat important, 8% Don’t Know/No Opinion
- **Complimentary beverages/snacks**: 35% Very important, 32% Somewhat important, 11% Don’t Know/No Opinion, 19% Not too important, 4% Not important at all
- **Cost of additional beverages/snack options**: 32% Very important, 27% Somewhat important, 12% Don’t Know/No Opinion, 20% Not too important, 9% Not important at all

Ticket cost is the most important factor when traveling by plane.
Which of these statements describes you best?

- 44%: I buy flight tickets based on what's cheapest and most convenient, regardless of airline.
- 29%: I factor in airline preferences when buying tickets, even if it means sometimes paying a premium.
- 26%: Just a quarter of Americans factor in airline preference if it means paying a premium.
- Don't Know / No Opinion
How satisfied are you with online flight booking websites/services?

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

- Very satisfied: 27%
- Somewhat satisfied: 28%
- Not too satisfied: 6%
- Not satisfied at all: 36%
- Don't know/No opinion: 6%
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   What Americans look for in hotel, the prevalence of Airbnb, and key brand metrics for some of the largest chains in the country.
How important are each of the following when deciding on what hotel to stay in?

- **Price**: 76% Very important, 16% Somewhat important, 6% Don't Know/No Opinion

- **Location**: 69% Very important, 22% Somewhat important, 6% Don't Know/No Opinion

- **Online reviews**: 38% Very important, 38% Somewhat important, 8% Don't Know/No Opinion

- **Amenities**: 38% Very important, 34% Somewhat important, 7% Don't Know/No Opinion

**What Americans look for in a hotel**
Which of these statements describes you best?

- Most Americans don’t pay attention to hotel chain when booking

- I book hotels based on what most fits my needs, regardless of hotel chain

- I prefer certain hotel chain(s) that I often book, even if there are alternatives

- Don’t Know / No Opinion
When it comes to planning a vacation, how important are online reviews for each of the following?

- **Housing/hotel recommendations**
  - Very important: 50%
  - Somewhat important: 31%
  - Don't know/no opinion: 7%
  - Not too important: 6%
  - Not important at all: 5%

- **Restaurants**
  - Very important: 40%
  - Somewhat important: 37%
  - Don't know/no opinion: 7%
  - Not too important: 11%
  - Not important at all: 5%

- **Transportation options**
  - Very important: 37%
  - Somewhat important: 36%
  - Don't know/no opinion: 8%
  - Not too important: 12%
  - Not important at all: 7%

- **Adventurous**
  - Very important: 33%
  - Somewhat important: 36%
  - Don't know/no opinion: 12%
  - Not too important: 13%
  - Not important at all: 6%

- **Cultural destinations**
  - Very important: 30%
  - Somewhat important: 38%
  - Don't know/no opinion: 8%
  - Not too important: 16%
  - Not important at all: 8%

- **Tours/guides**
  - Very important: 23%
  - Somewhat important: 36%
  - Don't know/no opinion: 8%
  - Not too important: 21%
  - Not important at all: 11%

Online reviews are most important for housing.
Airbnb Has Yet to Reach The Brand Recognition Levels of Major Hotels

Have you heard of the following…?

- **Have not heard of**
- **Have heard of**

1. Marriott: 92% (1), 10% (2)
2. Best Western: 90% (2), 10% (2)
3. Hilton: 90% (2), 10% (2)
4. Quality Inn: 87% (5), 13% (6)
5. Hyatt: 83% (6), 17% (7)
6. Wyndham Hotel Group: 74% (7), 26% (8)
7. Airbnb: 71% (8), 29% (8)
Airbnb Also Lags Behind Major Hotels In Terms of Purchasing Consideration

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

- Unlikely to purchase
- Don’t know/No opinion
- Likely to purchase

1. Marriott
2. Best Western
3. Hilton
4. Quality Inn
5. Hyatt
6. Wyndham Hotel Group
7. Crowne Plaza
8. Airbnb

Unlikely to purchase: 16% (Marriott), 17% (Best Western), 19% (Hilton), 18% (Quality Inn), 17% (Hyatt), 16% (Wyndham), 32% (Crowne Plaza), 23% (Airbnb)

Don’t know/No opinion: 30% (Marriott), 32% (Best Western), 33% (Hilton), 36% (Quality Inn), 39% (Hyatt), 47% (Wyndham), 30% (Crowne Plaza), 49% (Airbnb)

Likely to purchase: 54% (Marriott), 52% (Best Western), 48% (Hilton), 47% (Quality Inn), 45% (Hyatt), 37% (Wyndham), 37% (Crowne Plaza), 27% (Airbnb)
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?

- **Unlikely to purchase**
- **Don't know/No Opinion**
- **Likely to purchase**

- **Gen Z (18-21)****:**
  - Unlikely to purchase: 58%
  - Don't know/No Opinion: 14%
  - Likely to purchase: 28%

- **Millennials (22-37)****:**
  - Unlikely to purchase: 56%
  - Don't know/No Opinion: 18%
  - Likely to purchase: 36%

- **Gen X (38-53)****:**
  - Unlikely to purchase: 52%
  - Don't know/No Opinion: 21%
  - Likely to purchase: 27%

- **Boomers (54-72)****:**
  - Unlikely to purchase: 47%
  - Don't know/No Opinion: 31%
  - Likely to purchase: 23%
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.
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