



THE STATE OF THE AMERICAN TRAVELER

Leisure Travel Rebound Unlikely in Near Future

The outlook for domestic travel remains troubled, as Americans have reigned in their leisure travels and appear to be waiting out the economic storm. According to our recent survey of 1,000 Americans, a continuing high proportion are planning to decrease the number of leisure trips they will take in the next 12 months. The survey found that the average adult took 4.7 leisure trips in the past year, down 7.8 percent from the same poll taken 6 months ago. Also troubling is the finding that 22 percent expect to travel less in the upcoming year, a figure that has more than doubled from one year ago. With the percent of Americans planning to hold their travels steady (58.2%) at its highest recorded level, and strong declines in travel spending expectations, a rebound for leisure travel in the near future appears unlikely.

SNAPSHOT

Americans planning to decrease leisure travel spending in next 12 months

29%

Q In the past twelve (12) months, how many trips have you taken of more than 100 miles (round trip) for purely leisure or personal reasons?

One	19.5%
Two	19.6%
Three	14.9%
Four	13.8%
Five	8.5%
Six	7.5%
Seven to Ten	9.1%
Eleven to Twenty	5.2%
More than twenty	1.9%
Average	4.7

Q How many of these leisure trips were day trips (no overnight stay)?

Zero	51.4%
One	16.0%
Two	12.5%
Three or more	20.1%
Average:	1.8

Q How many of these leisure trips were primarily by automobile?

Zero	10.7%
One	22.6%
Two	19.9%
Three	12.9%
Four	10.9%
Five or more	22.9%
Average	3.9

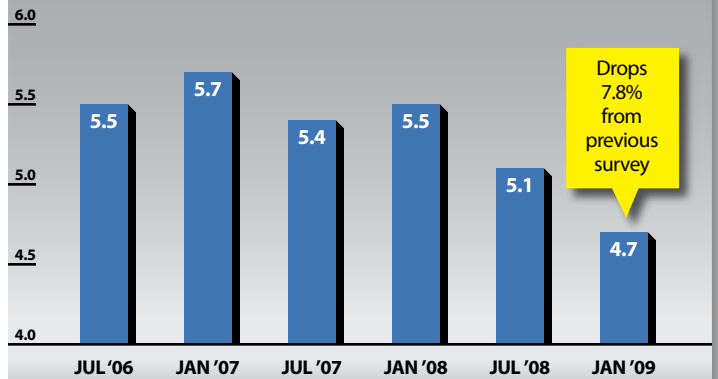
Q How many of these leisure trips included air travel?

Zero	60.5%
One	19.7%
Two	9.5%
Three	4.6%
Four or more	5.7%
Average	0.8

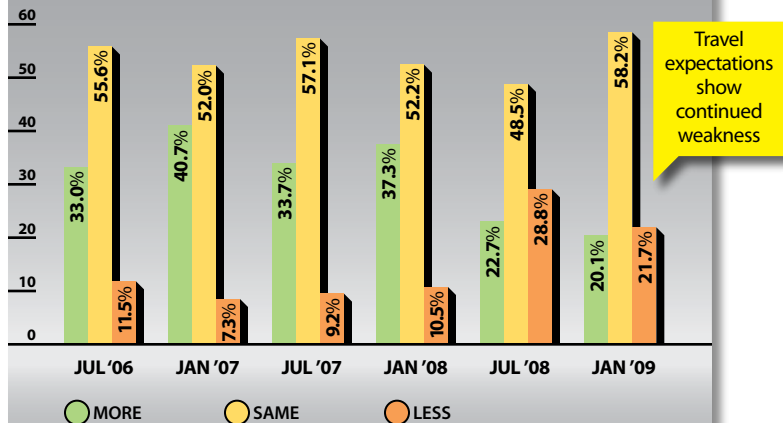
Q How many of these leisure trips included travel outside the United States?

Zero	83.2%
One	12.2%
Two	2.4%
Three or more	2.2%
Average	0.3

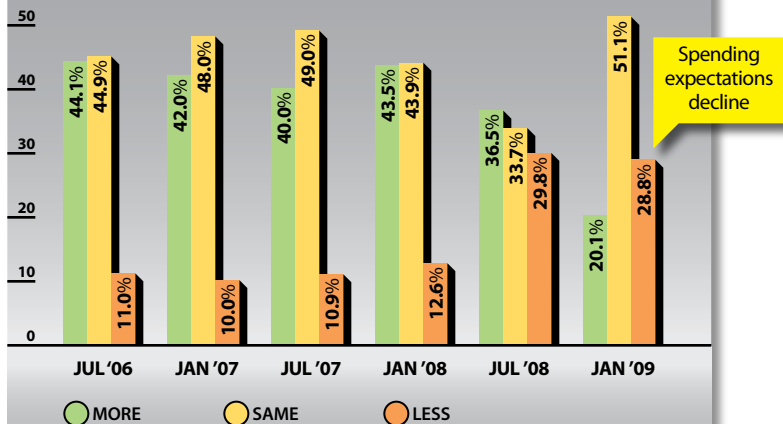
Average number of leisure trips taken (past 12 months)



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?



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?



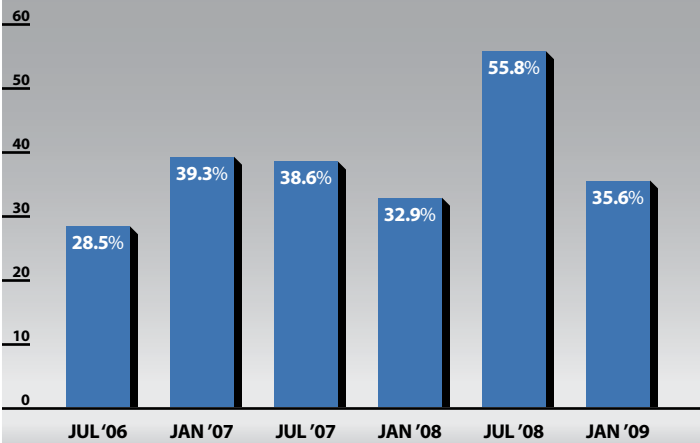
Reasons for cutting back on leisure travel



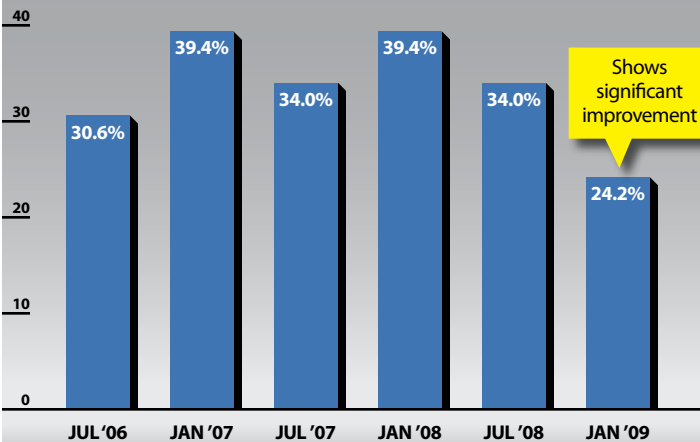
	Gasoline was too expensive	Personal financial reasons	Airfare was too expensive	Safety concerns
July 2006	47.3%	42.0%	28.6%	10.1%
January 2007	40.1%	45.2%	27.9%	9.8%
July 2007	46.1%	48.5%	24.4%	7.2%
January 2008	54.2%	51.8%	31.8%	7.6%
July 2008	57.8%	49.5%	35.2%	4.0%
January 2009	56.9%	52.8%	33.3%	4.3%

In the past 12 months, which (if any) of the following kept you from traveling more for leisure than you would have otherwise preferred?

Air travelers who think the overall convenience of air travel has "gotten worse" or "gotten much worse"



Air travelers who experienced "excessive security line wait" in past 12 months



Air Travel Improvements

Amid the gloomy economic climate, at least one bright light has emerged. Travelers' perceptions of their overall air travel experiences have improved.

While the personal automobile is by far the most common way Americans travel for leisure, air travel is also an extremely important mode of transportation. In fact, about 40 percent of leisure travelers took at least one of their trips by air in the past year.

Although the airline industry has been in turmoil and leisure travelers continue to report experiencing many frustrations (from long security lines to safety concerns in the air), in the past 6 months, traveler sentiment toward the convenience of traveling by air has improved dramatically. Last July, the percent of survey respondent saying the overall convenience of air travel has "gotten worse" or "gotten much worse" in the past year stood at a record high of 55.8 percent. In our most recent survey, however, this figure dropped dramatically to 35.6 percent. Clearly, travelers are feeling more comfortable with the complications faced when traveling by air. This is also reflected in the percent of survey respondents saying they have experienced an "excessive security line wait" in the past year. In July 2008, this figure stood at 34.0 percent. In January of this year, the figure dropped to 24.2 percent, the lowest level yet recorded in this study.

SNAPSHOT

Experienced excessively delayed flight(s) in past 12 months



Q In the past 12 months, which (if any) of the following kept you from traveling more for leisure than you would have otherwise preferred?

Gasoline was too expensive.....	56.9%
Personal financial reasons.....	52.8%
Airfare was too expensive.....	33.3%
Other personal responsibilities.....	23.9%
Too busy at work.....	19.1%
Health/Illness.....	13.4%
Didn't have enough vacation time.....	12.5%
Weather.....	5.9%
Child care responsibilities.....	5.3%
Did not have a travel companion(s).....	5.2%
Safety concerns.....	4.3%
Travels frequently for business and prefers to stay home.....	1.6%
Lack of availability (at hotels, spas, etc.).....	0.5%

Q In the past 12 months, which (if any) of these air travel related problems have you encountered?

* Asked only of those who said they traveled by air in the past 12 months

Excessively delayed flight(s).....	26.1%
Excessive security line wait.....	24.2%
Had to throw away an item in order to pass through airport security checkpoint.....	22.1%
Inappropriate use of overhead bins by passengers.....	21.3%
Check-in difficulties.....	11.5%
Rude or unprofessional airline staff.....	9.6%
Rude or unprofessional airport staff.....	9.4%
Rude or unprofessional TSA Staff.....	9.4%
Lost baggage.....	9.4%
Difficulty getting to the airport.....	4.6%
Safety concerns in the air.....	1.7%

Q In the past year, is the overall convenience of domestic air travel?

* Asked only of those who said they traveled by air in the past 12 months

Improved a lot.....	2.2%
Improved.....	15.1%
Stayed the same.....	43.0%
Gotten worse.....	27.4%
Gotten much worse.....	8.2%
I don't know.....	4.1%

DESTINATION HOT LIST



What are the domestic destinations that you would most like to visit in the upcoming year?*

Las Vegas	29.1%	Grand Canyon N.P.	8.5%
Orlando	24.2%	Boston.....	7.7%
New York City	21.7%	Seattle.....	7.4%
Washington DC	14.2%	New Orleans	6.9%
Chicago	12.4%	Miami	5.9%
San Francisco.....	10.4%	Phoenix	5.7%
Los Angeles	9.4%	Atlanta	5.5%
San Diego	8.7%	Yellowstone N.P.....	5.4%

What are the foreign destinations that you would most like to visit in the upcoming year?*

Canada	15.4%	Bahamas	3.3%
United Kingdom	14.6%	Spain	2.8%
Italy.....	11.0%	Switzerland.....	2.5%
Mexico	10.8%	Greece.....	2.3%
France	9.1%	China – Hong Kong	2.3%
Australia.....	7.8%	Holland.....	2.2%
Germany	7.1%	New Zealand.....	2.1%
Ireland.....	6.0%	Japan.....	1.8%

*An open-ended question, respondents were asked to consider only destinations they could reasonably expect to visit in the next 12 months.

In the past 12 months, which of these activities did you participate in (at least once) while on leisure trips (of 50 miles or more one-way)?



Dine in restaurants	70.0%	Foliage or fall scenery watching ..	17.6%	Take a day cruise	5.4%
Visit friends or relatives.....	65.9%	Day hiking.....	16.8%	Astronomy or stargazing.....	5.4%
Shopping	58.2%	Take a guided tour	16.6%	Visited a Revolutionary War	
Go to a beach or lake	43.9%	Visit a National Forest	15.3%	battlefield or historic	
Sightseeing in cities	42.4%	Fishing	15.2%	monument/location	4.9%
Visit an historical place		Camping	14.6%	Canoeing or kayaking.....	4.1%
or attraction	42.3%	Visit ethnic heritage sites.....	12.9%	Hunting	3.7%
Visit small towns/villages.....	41.2%	Visited a winery	12.8%	Horseback riding.....	3.4%
Sightseeing in rural areas	39.1%	Sailing or other water sports	9.6%	ATV or off road vehicles	2.9%
Casinos/Gambling	33.5%	Golf.....	9.5%	Skiing or snowboarding.....	1.6%
Visit a state or local park	27.8%	Visited a Civil War battlefield or		Tennis	1.6%
Drive a designated scenic byway ..	24.9%	historic monument/location ...	9.3%	Mountain biking	1.5%
Art galleries or museum	22.5%	Nightclubbing	9.1%	Hiking trip (1 or more nights	
Visit a theme/amusement park ..	21.9%	Bird watching	8.7%	on trail).....	1.4%
Attend a family reunion	21.0%	Stay in an all-inclusive resort	8.3%	White water rafting	0.9%
Visit National Parks	20.7%	Visit environmental/		Rock climbing.....	0.7%
Attend concert, play or musical ..	19.9%	ecological sites	8.2%	Mountaineering	0.7%
Attend a sporting event.....	17.6%	Spa or hot spring.....	7.5%	Ranch vacation	0.7%

Q Please tell us what is generally important to you in choosing the destinations you visit on leisure trips.* (Percent rating as "Extremely Important")

* Rated on five point scale from "Extremely Unimportant" to "Extremely Important"



Affordability.....	65.7%
Safety	54.3%
Weather	48.5%
Relaxing place.....	38.7%
Scenic beauty	36.4%
Lots to see and do.....	36.2%
Easy to get there	33.3%
Good hotels.....	28.9%
Food & dining	25.9%
Beaches	21.9%
Exciting.....	20.1%
Outdoor recreation.....	18.5%
Interesting culture.....	16.0%
Good for kids	15.2%
Historic attributes	13.7%
Shopping.....	9.1%
Museums.....	8.6%
Urban experiences and amenities...	6.4%
Nightlife.....	6.1%
Golf.....	4.3%
Spas	3.7%

Q In the past 12 months, did you take any leisure trips (of 50 miles or more one-way) specifically to do any of the following?

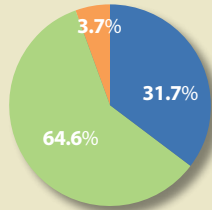
Dine in a specific restaurant	
or restaurants	22.3%
Attend a food-related event	
or festival.....	9.9%
Visit a destination because it	
has good restaurants.....	9.8%
Attend a wine-related event	
or festival	5.9%
Visit a destination because	
of an interest in the region's	
cuisine.....	5.7%
Visit a specific wine country region ..	5.5%
Visit a specific winery	5.0%

Q At most, how many miles (one-way) would you typically be willing to travel for a weekend getaway trip?

Under 100	8.2%
100 to 250 Miles.....	61.2%
251 to 500 Miles.....	22.7%
500 to 1000 Miles	4.5%
Over 1000 Miles	3.3%
Average (miles).....	303

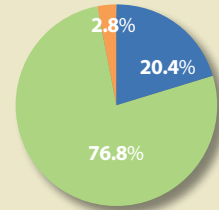
TRAVEL & TECHNOLOGY

Q In the past 12 months, have you used the official website of a destination's local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?



Yes 31.7%
No 64.6%
Not certain 3.7%

Q In the past 12 months, have you used a PRINTED commercial guide book (e.g., Frommer's, Lonely Planet, Let's Go, etc.) or an official visitors guide?

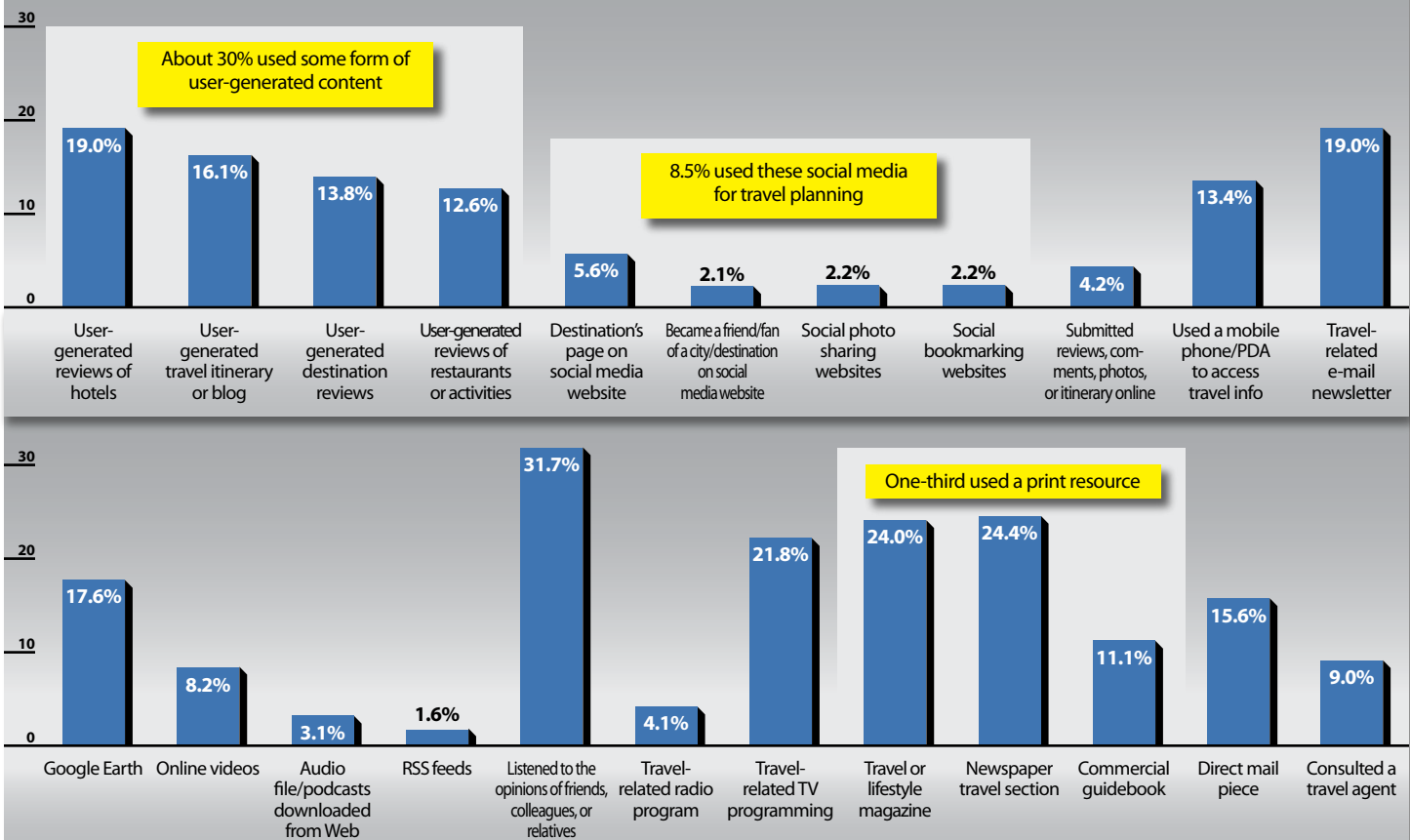


Yes 20.4%
No 76.8%
Not certain 2.8%

Q In the past 12 months, which of these travel planning tasks have you completed online or decided based on information found online?

Selected a hotel or place to stay	41.3%
Booked a hotel (or lodging)	40.1%
Purchased airline tickets	33.7%
Selected attractions or things to see and do in a destination I was planning to visit	31.3%
Read about local culture, arts, heritage or events of a destination	31.1%
Selected an airline	30.1%
Decided to visit a particular destination	27.3%
Decided how long I would stay at a destination	21.1%
Booked a rental car	20.0%
Selected a car rental company	19.5%
Selected a restaurant or place to eat in a destination I was planning to visit	17.8%

Technologies, Resources and Services Used to Plan Leisure Travel



Methodology The State of The American Traveler Survey is conducted every six months by Destination Analysts, Inc, a San Francisco-based tourism industry research company. The survey was conducted online amongst a nationally representative sample of adult Americans. From January 5th to 7th, 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, 1,000 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.



Destination Analysts

Speaking Topics

Destination Analysts challenges convention, bringing entertainment and education together in its speeches and educational sessions. Our trained presenters are appreciated for their engaging, accessible, audience-focused style, and can be booked for both key notes presentations and customized educational sessions and workshops. Several of our most popular speaking topics are described below.

Please contact us at 415 307-3283 for more information or to book an engagement.

The State of the American Traveler

Suggested Keynote

Go inside the mind of the American leisure traveler, with this entertaining, customized keynote. The American leisure travel market is rapidly evolving. The Internet, Web 2.0, safety concerns, gasoline prices, and changing product offerings have all collided in recent years to create a new and ever-shifting travel landscape. Using data collected in its bi-annual survey of leisure travelers, Destination Analysts will make sense of these changes and help your group move forward with confidence.

Measure, Monitor, Then Manage: The Essentials of Web Analytics and Online Research

Unless you are measuring you can't manage. This information rich session will provide an overview of the tools, methods and options in measuring and researching your online customers. Your websites and e-mail marketing programs should be providing critical information that your DMO managers can access, interpret and use. Cutting through the technology jargon, this session will teach you the why, how and what to do next. We will explain online research options and discuss how DMOs can use these techniques to gain the clarity and direction needed to effectively develop, manage and track the results of their Web sites and electronic promotions.

Research-Based Web Design: Making Your Website Meet Your Users Needs

If you're like most destinations, your website is now your most important marketing tool. Internet users are primarily task-oriented and will quickly leave a website that fails to immediately address their needs. Have you studied your website visitor to find out what they really want from your website? Do you know what will keep them on your website and create true stickiness? In this informative session, we will show you how to find out what your visitors want and shape your website to fit their needs. A tutorial on website usability testing will end this exciting and interactive session.

Food, Wine & Travel: A Perfect Pairing

Suggested Keynote

Culinary tourism is often portrayed as the latest "trend" in destination marketing, but is really one of the oldest and potentially most lucrative leisure travel niche market. In this revealing session we give you an inside look at so-called "foodie" travelers or culinary tourists. How are they psychographically different from other travelers and how can your destination tap this affluent, high-spending market?

Accountability Research 101: Measuring the Value of Your Marketing Programs

Destination marketers are under increasing pressure to show the return on investment of their sales and marketing activities to their communities. In this fast-paced and content rich session, you will learn the basics of how to measure the economic impact of your programs. Case studies and how-to examples will be presented on websites, visitor guides, tourism magazines and e-mail campaigns. You'll also get tips for effectively communicating to stakeholders and the media the value your works bring to your destination.

Guerilla Research: A Beginners Guide to Conducting Affordable and Effective Market Research

Smaller destinations face the same pressure to make hard decisions and justify their expenditures as large one. Yet, to these many small destinations market research is perceived as expensive and out of reach. In this one-hour session, you will learn the basics of conducting reliable and cost-effective research in-house. The session will leave you with a treasure trove of ideas for research with the highest impact to your organization and new ideas for minimizing and sharing research costs.



Research Products for DMOs

Destination Analysts has developed numerous ready-to-implement research solutions specifically for destination marketing organizations. While each solution is well-tested, every study is customized for your individual DMO's needs.

Website Usability Testing

Usability research gathers rich feedback on website user behavior to develop a deep understanding of the "whys" behind your web analytics. A particularly critical step in website redesign/re-launch, this study gauges users' emotional response, tests users' understanding of finding the information they seek, and identifies key areas of improvement.

Return on Investment Studies

The ability to quantify the return to your community of your organization's marketing efforts lends enormous power to clarifying strategy, and justifying funding maintenance or expansion. Destination Analysts can conduct conversion research on your website, visitors guide, advertising programs, events and other promotions, even convention/meetings sales and marketing efforts.

Economic Impact Analysis

With the political uncertainty faced by DMOs, having reliable data on the financial return the tourism industry brings to the community is crucial. Destination Analysts economists can provide a customized, comprehensive study of the economic impact of tourism, which includes all related facets—from visitor volume to jobs supported—and provides important benchmarking for the future.

Brand Audits & Branding Research

An imperative first step for both short and long term marketing strategy planning, a brand audit develops a clear picture of the essential elements that comprise your destination's brand and its core values. Branding research can also help measure your brand against its competitive set, and identify your destination's most lucrative target markets to develop specific selling points for each.

Meeting Planner Studies, Meetings Market Research & Competitive Analysis

A variety of research can be implemented to increase meetings business including studying meeting planners' motivations in the destination decision; identifying competition and providing comparison metrics on key attributes that meeting planners seek in a meetings destination; and quantifying the economic impact to the local economy.

Advertising Effectiveness & Tracking Studies and Advertising Concept Testing

To understand the full value of your advertising program, this study will measure ad recall and brand recognition and, most importantly, demonstrate how the advertising affected visitor behavior. Advertising concept testing can also be introduced to understand how ad creative fares with your target audience before costly media investment.

Traditional Focus Group Research & Online In-Depth Interviews

Qualitative research provides the color and depth of understanding to our informational pursuits. Whether you need potential visitors' responses to new marketing messaging or meeting planners opinions on your new online meetings tools, our seasoned facilitators can help seek out the valuable feedback you need.