



# THE STATE OF THE AMERICAN TRAVELER

## Traveler Sentiment Continues to Improve

Americans' expectations for their future travel and spending appears to be on the mend. Over 33 percent expect to increase the number of leisure trips they will take in the coming year, up from 28 percent last

July. Meanwhile, only 13.6 percent of American leisure travelers expect to cut back on their travel, compared with approximately 20 percent last July. Similar improvements were seen in expectations for spending on leisure travel, with both areas approaching pre-recession levels. In January of this year, 32.6 percent of leisure travelers said they expect to increase their travel spending in the coming year, compared to 20.1 percent one year earlier.

### SNAPSHOT

Americans planning to increase leisure travel spending in the next 12 months



**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	15.9%
Two	18.9%
Three	13.8%
Four	11.6%
Five	10.0%
Six	7.7%
Seven to Ten	10.6%
Eleven to Twenty	8.2%
Twenty One to Thirty	1.9%
More than Thirty	1.3%
<b>Average</b>	<b>4.7</b>

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

Zero	38.1%
One	20.0%
Two	13.5%
Three or more	28.5%
<b>Average:</b>	<b>2.3</b>

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

Zero	7.7%
One	21.4%
Two	18.9%
Three	13.2%
Four	8.6%
Five or more	30.3%
<b>Average</b>	<b>3.9</b>

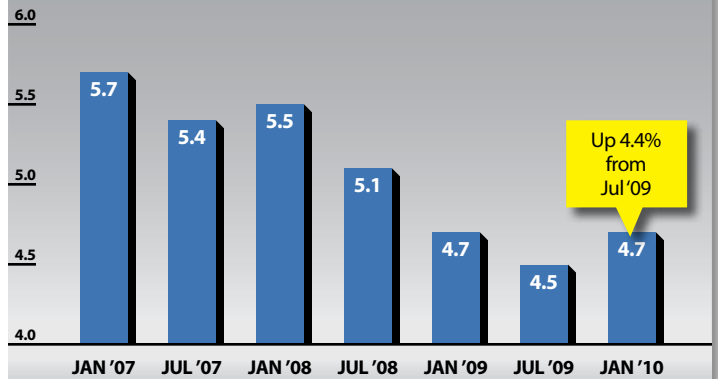
**Q How many of these leisure trips included air travel?**

Zero	55.1%
One	20.4%
Two	11.1%
Three	5.3%
Four or more	8.1%
<b>Average</b>	<b>1.1</b>

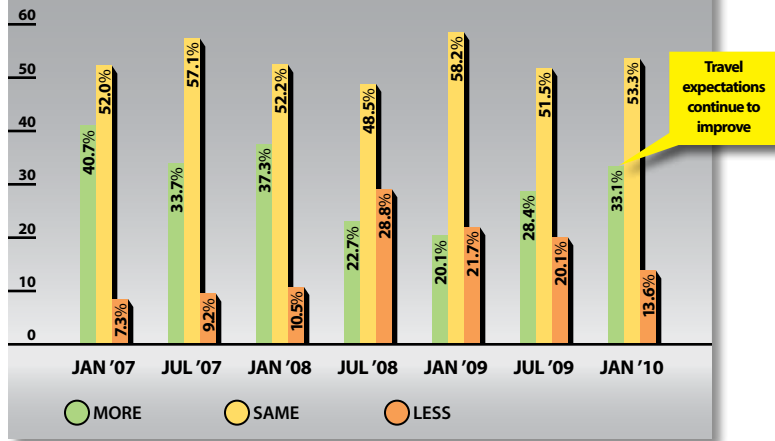
**Q How many of these leisure trips included travel outside the United States?**

Zero	75.9%
One	14.9%
Two	4.0%
Three or more	5.2%
<b>Average</b>	<b>0.5</b>

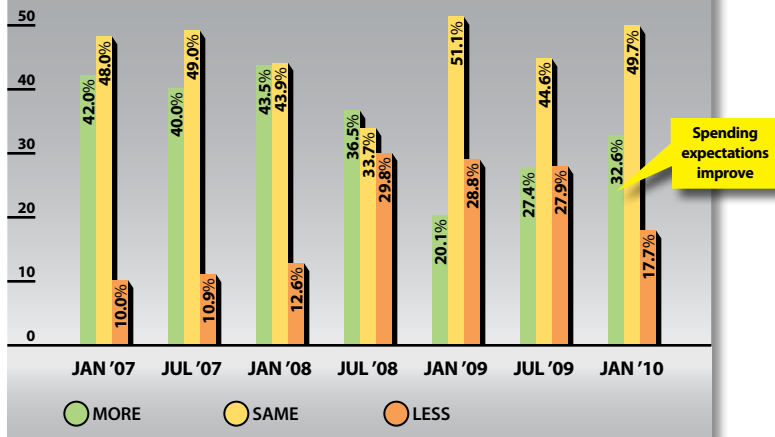
Average number of leisure trips taken (past 12 months)



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?



# Airport Screening Deemed Insufficient

Our January survey examined traveler's opinions on airport security. Nearly half of American leisure travelers feel that airport passenger screening techniques are inadequate. Almost 47 percent of leisure travelers reported they either "Agreed" or "Strongly agreed" that airport screening techniques were not sufficient. Only one-in-five travelers believes that passenger screening is adequate.

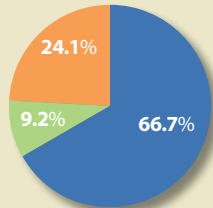
## SNAPSHOT

Thinks airport screening techniques are inadequate:



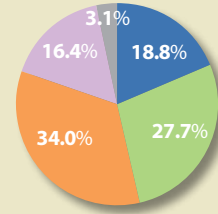
Travelers are also seven times more likely to prefer full-body scanning technology versus pat-downs at security checkpoints. A follow-up question found that the majority (57%) of travelers are either "Comfortable" or "Extremely comfortable" with the use of such technology – with only about 15 percent being "Uncomfortable" or "Extremely uncomfortable" with full-body scans.

**Q** If given a choice, which would you personally prefer be used to screen passengers?



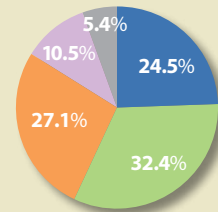
- Full-body scanner machines ..... 66.7%
- Full-body pat-downs of passengers... 9.2%
- Either – I am indifferent between the two..... 24.1%

**Q** TSA passenger screening techniques are currently not sufficient to ensure my safety when traveling by air.



- Strongly agree ..... 18.8%
- Agree..... 27.7%
- Neither agree nor disagree..... 34.0%
- Disagree..... 16.4%
- Strongly disagree ..... 3.1%

**Q** Which best describes your personal comfort level with being examined by airport security in a full body scanner when passing through airport security?



- Extremely comfortable..... 24.5%
- Comfortable..... 32.4%
- Neutral..... 27.1%
- Uncomfortable..... 10.5%
- Extremely uncomfortable..... 5.4%

## 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%
July 2009	56.5%	66.4%	32.7%	6.5%
January 2010	41.6%	56.6%	31.8%	12.0%

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

**Q** Which of the following are you likely to do given the overall economic climate (including gasoline prices, travel costs and your personal financial situation)?

(Select all that apply)

- Look for travel discounts or bargains ..... 63.1%
- Visit generally less expensive destinations ..... 32.6%
- Take at least one "staycation" ..... 21.7%
- Reduce the number of total days spent on trips ..... 20.4%
- Shorten the distance of my trip(s) to save money ..... 19.6%
- Reduce the number of leisure trips ..... 19.4%
- Select less expensive transportation ..... 16.8%
- None of the above ..... 16.0%
- Cancel a trip that I've already begun to plan ..... 3.6%

**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?

(Select all that apply)

- Personal financial reasons ..... 56.6%
- Gasoline was too expensive ..... 41.6%
- Airfare was too expensive ..... 31.8%
- I was too busy at work ..... 29.5%
- I didn't have enough vacation time ..... 19.2%
- Safety concerns ..... 12.0%
- Child care responsibilities ..... 11.8%
- Other personal responsibilities ..... 10.9%
- Health/Illness ..... 10.8%
- I did not have a travel companion(s) ..... 6.8%
- I travel frequently for business and preferred to stay home ..... 3.3%
- Lack of availability (at hotels, spas, etc.) ..... 1.8%

# DESTINATION HOT LIST



## What are the five domestic destinations that you would most like to visit in the upcoming year? (Write in up to five)

Las Vegas .....	<b>30.8%</b>	Miami .....	<b>8.9%</b>
New York City .....	<b>25.1%</b>	Atlanta .....	<b>7.5%</b>
Orlando/Disney World .....	<b>19.6%</b>	Dallas .....	<b>6.1%</b>
Washington DC .....	<b>12.5%</b>	Seattle .....	<b>5.9%</b>
Los Angeles .....	<b>10.2%</b>	Grand Canyon .....	<b>5.5%</b>
Chicago .....	<b>9.9%</b>	Boston .....	<b>5.3%</b>
San Francisco .....	<b>9.5%</b>	San Antonio .....	<b>5.0%</b>
San Diego .....	<b>9.4%</b>	New Orleans .....	<b>4.9%</b>

## What are the five foreign countries that you would most like to visit in the upcoming year? (Write in up to five)

Mexico .....	<b>16.7%</b>	Spain .....	<b>5.1%</b>
Canada .....	<b>15.9%</b>	Japan .....	<b>4.9%</b>
United Kingdom .....	<b>15.2%</b>	China - Hong Kong .....	<b>4.7%</b>
France .....	<b>13.3%</b>	Bahamas .....	<b>3.8%</b>
Italy .....	<b>11.7%</b>	Jamaica .....	<b>3.0%</b>
Germany .....	<b>6.5%</b>	Greece .....	<b>2.0%</b>
Ireland .....	<b>6.2%</b>	Brazil .....	<b>1.9%</b>
Australia .....	<b>5.1%</b>	New Zealand .....	<b>1.6%</b>

## 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)?



(Select all that apply)

Dine in restaurants .....	<b>67.8%</b>	Fishing .....	<b>22.1%</b>	Bird watching .....	<b>9.0%</b>
Visit friends or relatives .....	<b>63.7%</b>	Drive a designated scenic byway ..	<b>22.1%</b>	Astronomy or stargazing .....	<b>8.6%</b>
Shopping .....	<b>61.3%</b>	Attend a sporting event .....	<b>20.8%</b>	Horseback riding .....	<b>8.1%</b>
Go to a beach or lake .....	<b>52.3%</b>	Nightclubbing .....	<b>18.8%</b>	Hunting .....	<b>7.7%</b>
Sightseeing in cities .....	<b>46.0%</b>	Visit a National Forest .....	<b>18.7%</b>	ATV or off road vehicles .....	<b>7.7%</b>
Visit small towns/villages .....	<b>40.9%</b>	Take a guided tour .....	<b>17.9%</b>	Canoeing or kayaking .....	<b>7.4%</b>
Visit an historical place or attraction .....	<b>40.8%</b>	Foliage or fall scenery watching ..	<b>15.6%</b>	Hiking trip (1 or more nights on trail) .....	<b>6.4%</b>
Sightseeing in rural areas .....	<b>37.0%</b>	Visit ethnic heritage sites .....	<b>14.6%</b>	Mountain biking .....	<b>6.0%</b>
Casinos/Gambling .....	<b>35.1%</b>	Sailing or other water sports .....	<b>13.6%</b>	Rock climbing .....	<b>5.8%</b>
Visit a state or local park .....	<b>35.1%</b>	Visited a winery .....	<b>13.3%</b>	Tennis .....	<b>5.4%</b>
Visit a theme/amusement park .....	<b>34.0%</b>	Stay in an all-inclusive resort .....	<b>13.0%</b>	Skiing or snowboarding .....	<b>5.4%</b>
Visit National Parks .....	<b>27.9%</b>	Golf .....	<b>11.6%</b>	Visited a Revolutionary War battlefield or historic monument/location .....	<b>4.6%</b>
Camping .....	<b>26.8%</b>	Visit environmental/ ecological sites .....	<b>11.6%</b>	White water rafting .....	<b>4.5%</b>
Day hiking .....	<b>24.1%</b>	Spa or hot spring .....	<b>10.4%</b>	Ranch vacation .....	<b>3.9%</b>
Attend concert, play or musical ..	<b>23.9%</b>	Take a day cruise .....	<b>9.7%</b>	Mountaineering .....	<b>3.1%</b>
Art galleries or museum .....	<b>23.6%</b>	Visited a Civil War battlefield or historic monument/location .....	<b>9.5%</b>		
Attend a family reunion .....	<b>22.7%</b>				

## Q In the past 12 months, which of the following have you done while on leisure trips (of 50 miles or more one way)?

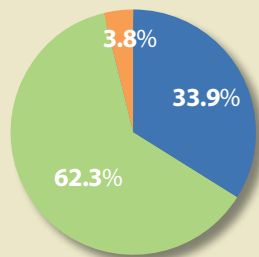
(Select all that apply)



Spent more money than I expected to .....	<b>56.8%</b>
Taken a laptop computer with me when I traveled for leisure .....	<b>40.6%</b>
Did something totally new and exciting .....	<b>30.0%</b>
Made a new friend(s) .....	<b>28.7%</b>
Used a mobile phone, PDA or handheld device to access online travel information .....	<b>24.0%</b>
Traveled specifically to get away from my work .....	<b>22.7%</b>
Ordered room service in a hotel .....	<b>20.0%</b>
Attended religious services .....	<b>16.5%</b>
Done something risky or dangerous .....	<b>16.0%</b>
Brought my pet(s) with me .....	<b>14.5%</b>
Extended my vacation because I was having so much fun .....	<b>12.2%</b>
Took my work with me on vacation .....	<b>11.4%</b>
Purchased a travel package .....	<b>10.9%</b>
Traveled specifically to spend time away from someone .....	<b>10.6%</b>
Used the mini bar in a hotel .....	<b>10.2%</b>
Brought my own meal on an airline .....	<b>9.3%</b>
Went to an adult cabaret, theater or strip club .....	<b>7.4%</b>
Met a new romantic partner .....	<b>6.2%</b>
Traveled in an organized group tour .....	<b>5.9%</b>
Took a class or educational seminar .....	<b>4.8%</b>
Came home early because I was bored .....	<b>4.2%</b>
Traveled to meet (for the first time) someone I met online .....	<b>3.7%</b>

# 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?

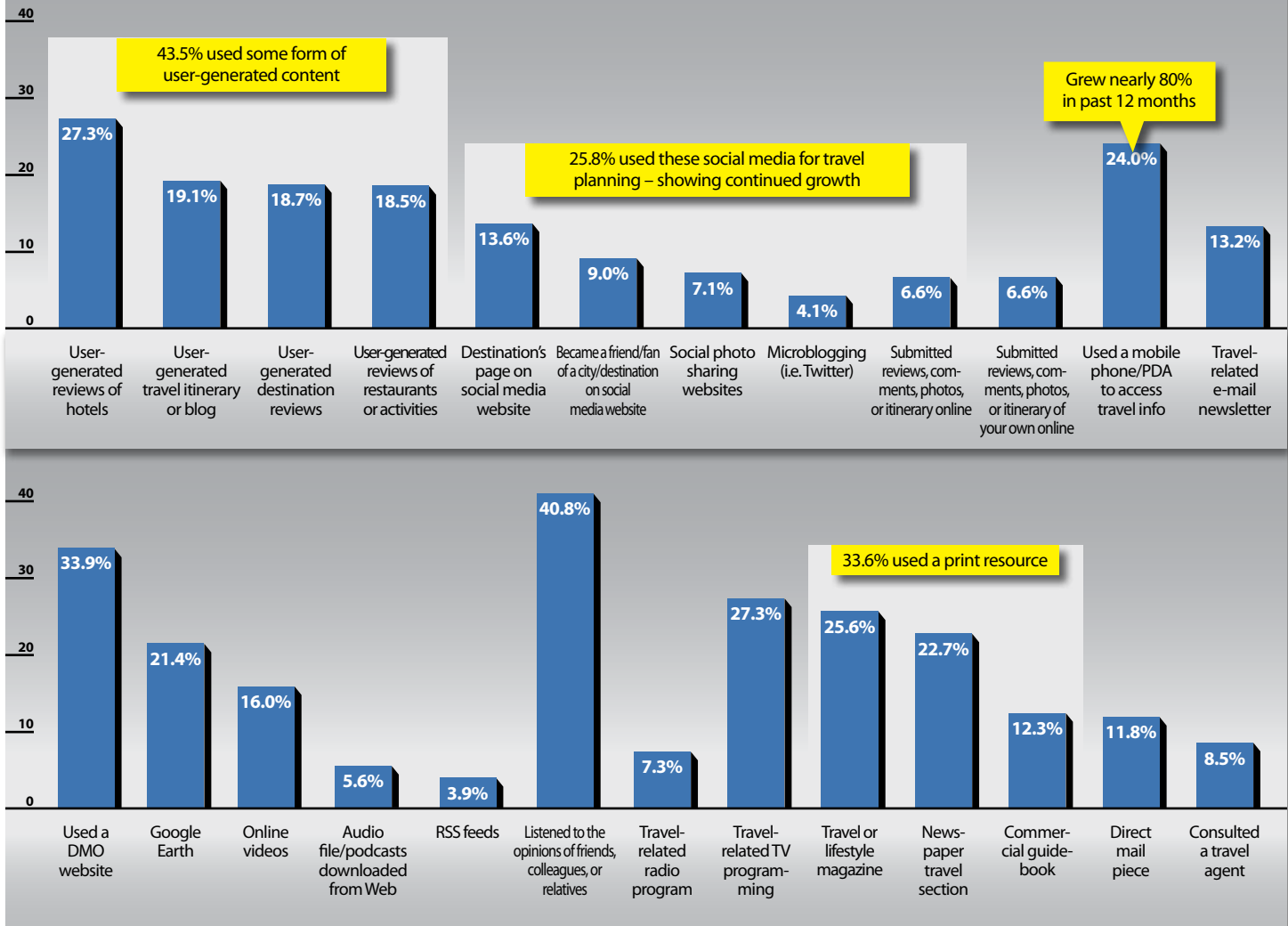


Yes ..... 33.9%  
 No ..... 62.3%  
 I don't know ..... 3.8%

**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 of stay ..... 44.7%  
 Booked a hotel (or lodging) ..... 42.9%  
 Selected attractions or things to see and do in a destination  
 I was planning to visit ..... 35.8%  
 Purchased airline tickets ..... 33.7%  
 Read about local culture, arts, heritage or events of a destination ..... 32.0%  
 Decided to visit a particular destination ..... 31.6%  
 Selected an airline ..... 30.9%  
 Selected a restaurant or place to eat in a destination I was planning to visit .. 25.4%  
 Decided how long I would stay at a destination ..... 25.2%  
 Booked a rental car ..... 21.9%  
 Selected a car rental company ..... 20.1%

## 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 January 6th, 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, 1,011 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.