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.

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 continue to improve

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?

Spending expectations improve

Average number of leisure trips taken (past 12 months)

Up 4.4% from Jul’09

Average number of leisure trips taken (past 12 months)

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?

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>15.9%</td>
</tr>
<tr>
<td>Two</td>
<td>18.9%</td>
</tr>
<tr>
<td>Three</td>
<td>13.8%</td>
</tr>
<tr>
<td>Four</td>
<td>11.6%</td>
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<tr>
<td>Five</td>
<td>10.0%</td>
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<tr>
<td>Six</td>
<td>7.7%</td>
</tr>
<tr>
<td>Seven to Ten</td>
<td>10.6%</td>
</tr>
<tr>
<td>Eleven to Twenty</td>
<td>8.2%</td>
</tr>
<tr>
<td>Twenty One to Thirty</td>
<td>1.9%</td>
</tr>
<tr>
<td>More than Thirty</td>
<td>1.3%</td>
</tr>
<tr>
<td>Average</td>
<td>4.7%</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>38.1%</td>
</tr>
<tr>
<td>One</td>
<td>20.0%</td>
</tr>
<tr>
<td>Two</td>
<td>13.5%</td>
</tr>
<tr>
<td>Three</td>
<td>28.5%</td>
</tr>
<tr>
<td>Average</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

How many of these leisure trips were primarily by automobile?

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>7.7%</td>
</tr>
<tr>
<td>One</td>
<td>21.4%</td>
</tr>
<tr>
<td>Two</td>
<td>18.9%</td>
</tr>
<tr>
<td>Three</td>
<td>13.2%</td>
</tr>
<tr>
<td>Four</td>
<td>8.6%</td>
</tr>
<tr>
<td>Five or more</td>
<td>30.3%</td>
</tr>
<tr>
<td>Average</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

How many of these leisure trips included air travel?

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>55.1%</td>
</tr>
<tr>
<td>One</td>
<td>20.4%</td>
</tr>
<tr>
<td>Two</td>
<td>11.1%</td>
</tr>
<tr>
<td>Three</td>
<td>5.3%</td>
</tr>
<tr>
<td>Four or more</td>
<td>8.1%</td>
</tr>
<tr>
<td>Average</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>75.9%</td>
</tr>
<tr>
<td>One</td>
<td>14.9%</td>
</tr>
<tr>
<td>Two</td>
<td>4.0%</td>
</tr>
<tr>
<td>Three or more</td>
<td>5.2%</td>
</tr>
<tr>
<td>Average</td>
<td>0.5%</td>
</tr>
</tbody>
</table>
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. 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.

**SNAPSHOT**

**Thinks airport screening techniques are inadequate:**

47%

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**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%

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**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 ....................................... 32.1%
- Uncomfortable .............................. 10.5%
- Extremely uncomfortable ............... 5.4%

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**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%

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**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%
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 ........................................... 67.8%
- Visit friends or relatives ..................................... 63.7%
- Shopping .......................................................... 61.3%
- Go to a beach or lake .......................................... 52.3%
- Sightseeing in cities ........................................... 46.0%
- Visit small towns/villages .................................... 40.9%
- Visit an historical place ....................................... 40.8%
- Sightseeing in rural areas .................................... 37.0%
- Casinos/Gambling ............................................ 35.1%
- Visit a state or local park .................................... 35.1%
- Visit a theme/amusement park ............................. 34.0%
- Visit National Parks .......................................... 27.9%
- Camping ........................................................... 26.8%
- Day hiking ......................................................... 24.1%
- Attend concert, play or musical ............................. 23.9%
- Art galleries or museum ....................................... 23.6%
- Attend a family reunion ....................................... 22.7%
- Fishing ............................................................. 22.1%
- Drive a designated scenic byway ............................ 22.1%
- Attend a sporting event ....................................... 20.8%
- Nightclubbing .................................................... 18.8%
- Visit a National Forest ......................................... 18.7%
- Take a guided tour .............................................. 17.9%
- Foliage or fall scenery watching ............................ 15.6%
- Visit ethnic heritage sites .................................... 14.6%
- Sailing or other water sports ................................ 13.6%
- Visit a winery .................................................... 13.3%
- Stay in an all-inclusive resort ............................... 13.0%
- Golf ................................................................. 11.6%
- Visit environmental/ ecological sites ...................... 11.6%
- Spa or hot spring ............................................... 10.4%
- Take a day cruise ............................................... 9.7%
- Visited a Civil War battlefield or historic monument/location .................................................... 9.5%
- Bird watching ..................................................... 9.0%
- Astronomy or stargazing ..................................... 8.6%
- Horseback riding ............................................... 8.1%
- Hunting ........................................................... 7.7%
- ATV or off road vehicles ..................................... 7.7%
- Canoeing or kayaking ......................................... 7.4%
- Hiking trip ........................................................ 7.3%
- (1 or more nights on trail) .................................... 6.4%
- Mountain biking ............................................... 6.0%
- Rock climbing .................................................. 5.8%
- Tennis ............................................................. 5.4%
- Skiing or snowboarding ...................................... 5.4%
- Visited a Revolutionary War battlefield or historic monument/location ........................................ 4.6%
- White water rafting ............................................ 4.5%
- Ranch vacation .................................................. 3.9%
- Mountaineering ............................................... 3.1%

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

**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**

- 43.5% used some form of user-generated content
- 25.8% used these social media for travel planning – showing continued growth
- Grew nearly 80% in past 12 months

**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%.