



THE STATE OF THE AMERICAN TRAVELER™

Leisure Travel Outlook Rebounds

American travelers are once again feeling more optimistic about their upcoming leisure travels. The proportion of leisure travelers expecting to travel more in the upcoming year (compared to the previous year) is approaching its highest level since January 2008, or before the recent economic crisis began. In our latest survey, this figure increased to 33 percent, up from 27 percent six months ago. Underlying this increase appears to be rising consumer confidence driven by recent improvements in the nation's economic outlook and relative stability in prices at the pump. In this round of our survey, fewer travelers reported that either personal financial concerns or high gas prices had kept them from traveling more than they would have otherwise preferred in the past 12 months.

SNAPSHOT

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

33%

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

One	24.4%
Two	21.2%
Three	12.9%
Four	9.6%
Five	7.3%
Six	6.6%
Seven to Ten	9.3%
Eleven to Twenty	6.1%
Twenty One to Thirty	1.6%
More than Thirty	0.8%
Average	4.8

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

Zero	41.6%
One	20.9%
Two	14.0%
Three or more	23.5%
Average	2.1

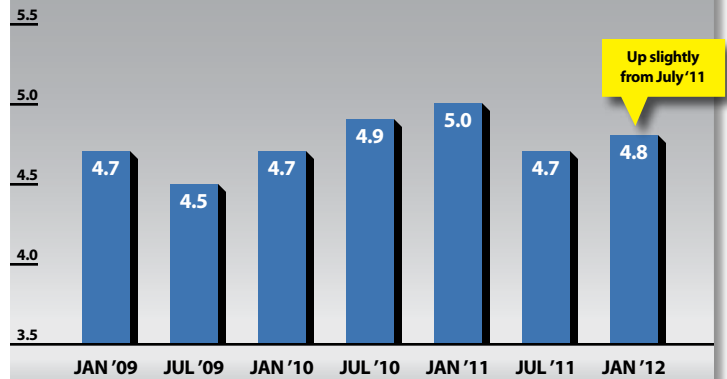
Q How many of these leisure trips were primarily by automobile?

Zero	11.9%
One	25.5%
Two	19.1%
Three	11.4%
Four	8.5%
Five or more	23.5%
Average	3.3

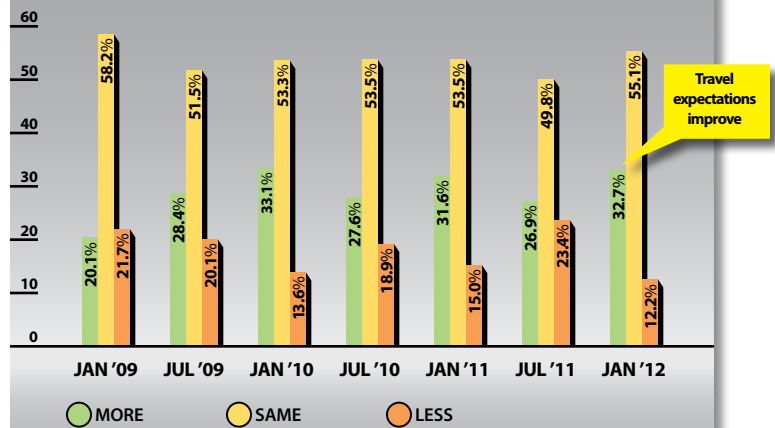
Q How many of these leisure trips included travel outside the United States?

Zero	79.3%
One	15.2%
Two	3.1%
Three or more	2.4%
Average	0.3

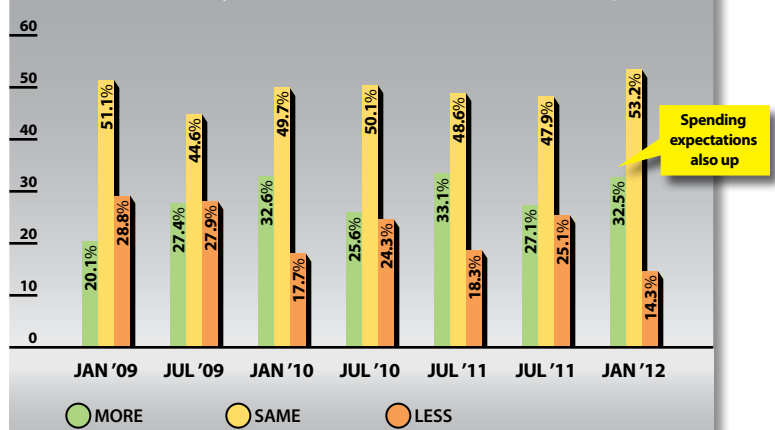
Average number of leisure trips taken (past 12 months)



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?



Americans are Resolved to Travel!

SNAPSHOT

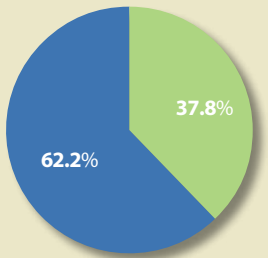
Percent of leisure travelers making a travel-related New Year's resolution



Our enthusiasm for travel runs deep, and is shown in response to a first-time question asked in this January survey. Apparently, many travelers (37.8%) make New Year's resolutions and nearly one quarter (24.1%) of these resolutions involve leisure travel in some way. When asked what type of travel-related resolution they made (or would make), the most common was to travel more. Nearly 30 percent of those surveyed said they would increase

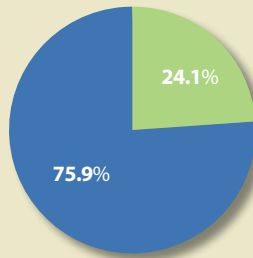
their travels, followed by making an effort to travel with friends and family (8.9%), visiting a specific domestic destination (9.2%) and visiting a specific international destination (7.5%).

Q Did you make any New Year's resolutions this year?



Yes 37.8%
No 62.2%

Q Were any of these resolutions related to leisure travel?



Yes 24.1%
No 75.9%

Top Travel-related New Year's Resolutions

1. Travel more – take more frequent trips 29.5%
2. Travel more with friends and family 8.9%
3. Visit a specific domestic destination* 9.2%
4. Visit a specific international destination 7.5%
5. Visit new places 7.2%
6. Be more careful with money while traveling 5.8%
7. Miscellaneous other resolution 5.6%
8. Take a cruise 3.9%
9. Visit Las Vegas 3.5%
10. Visit New York City 3.4%

* Destination other than Las Vegas, New York City, Hawaii, Florida, California and Alaska, each of which was specifically mentioned by more than 1 percent of respondents.

Reasons for cutting back on leisure travel



	Gasoline was too expensive	Personal financial reasons	Airfare was too expensive	Safety concerns
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%
July 2010	40.7%	55.9%	36.0%	8.4%
January 2011	39.3%	54.6%	34.9%	11.0%
July 2011	53.6%	48.9%	38.9%	8.9%
January 2012	45.9%	49.1%	35.2%	7.8%

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 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 49.1%
- Gasoline was too expensive 45.9%
- Airfare was too expensive 35.2%
- I was too busy at work 23.7%
- I didn't have enough vacation time 18.9%
- Child care responsibilities 12.2%
- Health/Illness 8.6%
- Safety concerns 7.8%
- I did not have a travel companion(s) 7.3%
- Other personal responsibilities 6.7%
- Frustration with TSA airport screening procedures 6.5%
- I travel frequently for business and preferred to stay home 2.2%
- Lack of availability (at hotels, golf courses, spas, etc.) 1.6%

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 55.2%
- Visit generally less expensive destinations 26.2%
- Take at least one "staycation" (a vacation spent at home) rather than traveling 19.1%
- Reduce the number of leisure trips I will take 17.7%
- Reduce the number of total days I will spend on leisure trip(s) to save money 16.7%
- Shorten the distance of my trip(s) or reduce side trips along the way to save money 16.1%
- Select less expensive mode(s) of transportation 14.4%
- Cancel a trip that I've already begun to plan 2.5%



DESTINATION HOT LIST



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

Las Vegas.....	34.0%	Anaheim/Disneyland	6.5%
New York City	28.3%	Washington, DC.....	6.0%
Orlando/Disney World	25.8%	Seattle.....	6.0%
Chicago	11.4%	New Orleans	5.7%
San Francisco.....	11.4%	Boston.....	5.1%
San Diego	11.2%	Grand Canyon.....	4.9%
Los Angeles	9.8%	Atlanta	4.7%
Miami	8.4%	Phoenix	4.1%

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

United Kingdom	14.1%	Ireland.....	4.8%
Italy.....	12.8%	China.....	4.2%
Canada.....	12.0%	Japan.....	3.6%
France.....	11.7%	Bahamas	3.5%
Mexico	10.2%	Greece.....	3.3%
Australia.....	6.4%	Holland.....	2.7%
Spain	5.8%	Jamaica	2.7%
Germany	5.6%	New Zealand.....	2.5%



What We Do on Our Leisure Trips

Visit friends or relatives.....	73.7%	Drive a designated scenic byway .	19.0%	Canoeing or kayaking.....	7.2%
Dine in restaurants	69.2%	Fishing	17.5%	Horseback riding.....	6.9%
Shopping	61.6%	Attend a family reunion	16.4%	Take a day cruise	6.7%
Go to a beach or lake	46.8%	Nightclubbing	16.0%	Hunting	6.4%
Sightseeing in cities.....	43.4%	Visit a National Forest	13.2%	Hiking trip (1 or more nights on trail).....	6.0%
Visit an historical place or attraction.....	37.4%	Take a guided tour	12.8%	Astronomy or stargazing.....	5.8%
Visit small towns/villages.....	34.0%	Stay in an all-inclusive resort	12.7%	Mountain biking.....	5.4%
Visit a theme/amusement park ..	30.4%	Visit a winery	12.4%	ATV or off road vehicles	5.0%
Casinos/Gambling	29.7%	Foliage or fall scenery watching..	12.4%	White water rafting	4.9%
Visit a state or local park	26.8%	Visit environmental/ecological sites.....	9.8%	Visit a Revolutionary War battlefield or historic monument/location	4.3%
Sightseeing in rural areas	25.7%	Visit ethnic heritage sites.....	9.6%	Rock climbing.....	4.1%
Visit National Parks	25.7%	Sailing or other water sports	9.2%	Mountaineering	2.6%
Day hiking.....	22.2%	Spa or hot spring	9.0%	Tennis	2.4%
Attend a sporting event.....	21.8%	Visit a Civil War battlefield or historic monument/location ..	8.8%	Ranch vacation	2.4%
Camping	21.0%	Golf.....	8.4%	Skiing or snowboarding.....	2.4%
Art galleries or museum	20.3%	Bird watching	7.2%		
Attend concert, play or musical ..	20.0%				

Q 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)

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)

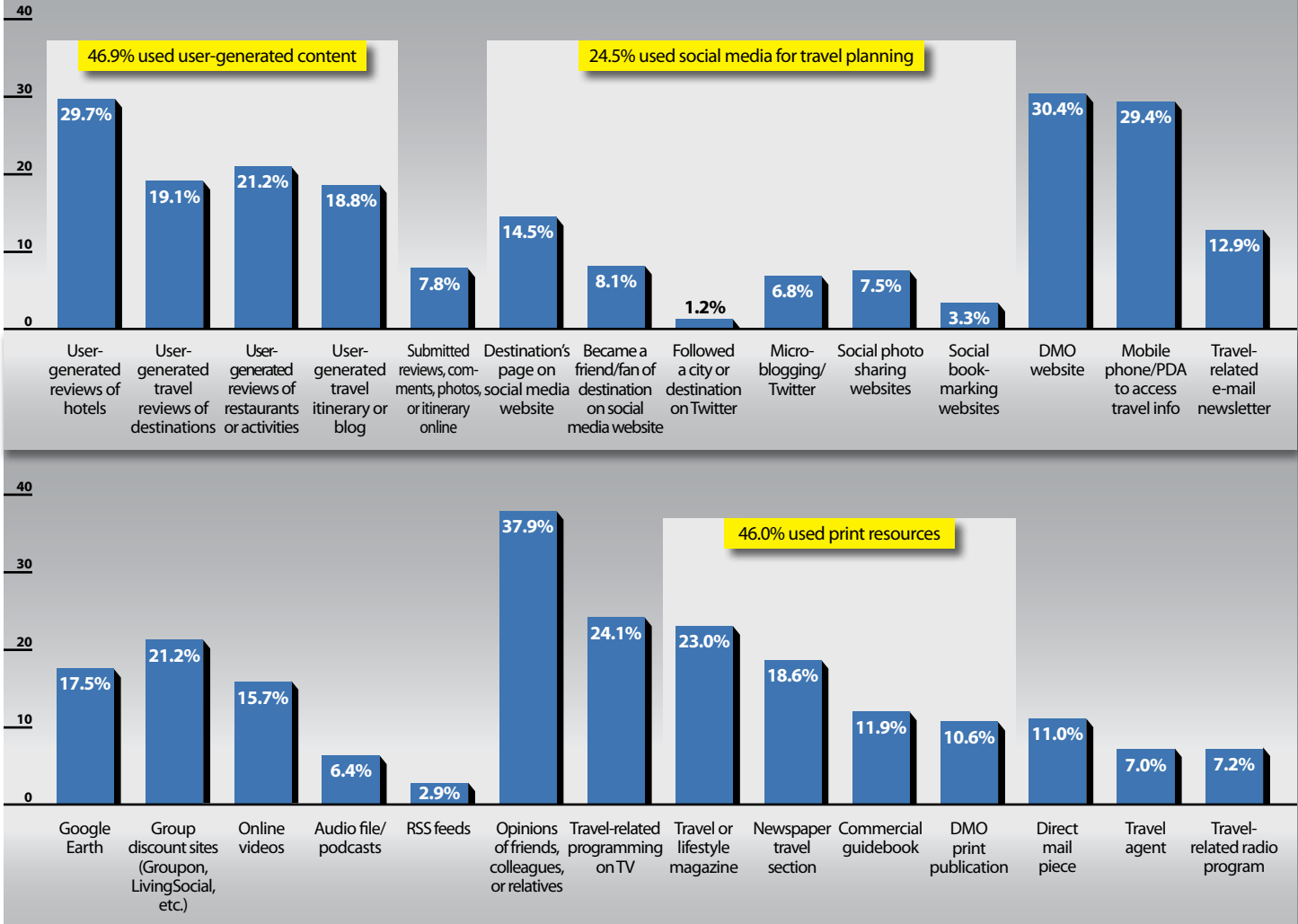


Spent more money than I expected to.....	47.9%
Took a laptop computer with me when I traveled for leisure.....	39.1%
Made a new friend(s)	27.7%
Did something totally new and exciting	25.8%
Traveled specifically to get away from my work	17.3%
Ordered room service in a hotel.....	17.0%
Attended religious services	13.3%
Did something risky or dangerous	12.0%
Used an iPad or other tablet computer to access online travel information	10.8%
Brought my pet(s) with me	10.5%
Extended my vacation because I was having so much fun	10.0%
Took my work with me on vacation	9.8%
Brought my own meal on an airline	9.6%
Traveled specifically to spend time away from someone	8.8%
Used the mini bar in a hotel	8.3%
Purchased a travel package	7.7%
Met a new romantic partner	5.9%
Took a class or educational seminar	4.8%
Went to an adult cabaret, theater or strip club	4.8%
Traveled in an organized group tour	3.9%
Came home early because I was bored	3.5%
Traveled to meet (for the first time) someone I was introduced to online.....	2.8%

TRAVEL & TECHNOLOGY

Technologies, Resources and Services Used to Plan Leisure Travel

In the past 12 months, which of these have you used to help plan your leisure travel? (Select all that apply)



Q When did you use your mobile device for travel information?*

(Select all that apply)

*Asked only of those using mobile phone/PDA to access travel information

DURING a trip(s)

89.2%

BEFORE I left home for a trip(s)

63.3%

Q Which of the following did you specifically do using your mobile device?*

(Select all that apply)

*Asked only of those using mobile phone/PDA to access travel information

Find restaurant information	69.4%
Check weather	63.3%
Look at maps	62.6%
Use a GPS-related app for directions	58.6%
Find hotel information	44.4%
Find shopping information	42.4%
Find sightseeing or attractions information	38.4%
Check into a flight	28.3%
Use a destination-specific app for travel information	14.8%
Get a mobile boarding pass	14.5%
Research public transportation	12.8%
Check into a hotel	12.1%
Check out of a hotel	10.1%
Buy tickets (to an event, festival, museum, etc.)	8.4%

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 is conducted online amongst a nationally representative sample of adult Americans. From January 3rd through January 5th, 2012, 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, 1,010 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.