



THE STATE OF THE AMERICAN TRAVELER™

Leisure Travel Expectations Rise Sharply

Americans are in the mood to travel. January results from our biannual national survey show travelers are once again feeling optimistic about their upcoming leisure travels. The percent of leisure travelers expecting to travel more in the upcoming year (compared to the previous year) is approaching its highest level since before the 2008 economic meltdown. In our latest survey, the proportion of leisure travelers planning to travel more increased to 34.2 percent, up from 27.5 percent six months ago. Spending expectations are also *(continues on page 2)*

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 (round-trip) for purely leisure or personal reasons?

One.....	27.2%
Two.....	21.7%
Three.....	13.7%
Four.....	9.9%
Five.....	7.9%
Six.....	5.2%
Seven to Ten.....	7.5%
Eleven to Twenty.....	4.2%
Twenty One to Thirty.....	1.4%
More than Thirty.....	1.3%
Average.....	4.6

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

Zero.....	41.8%
One.....	20.8%
Two.....	13.4%
Three or more.....	23.9%
Average.....	1.9

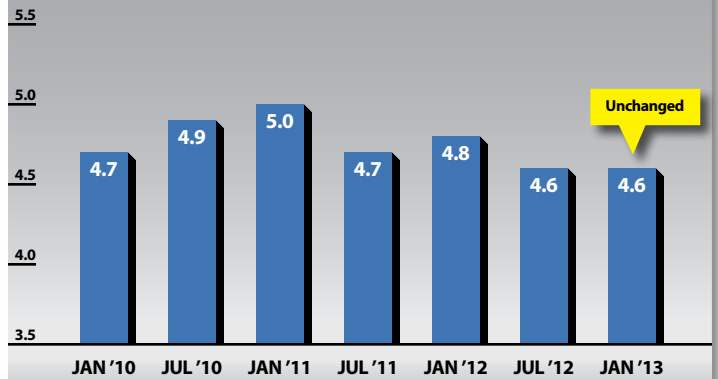
Q How many of these leisure trips were primarily by automobile?

Zero.....	14.0%
One.....	27.4%
Two.....	20.3%
Three.....	11.4%
Four.....	7.6%
Five or more.....	19.3%
Average.....	2.8

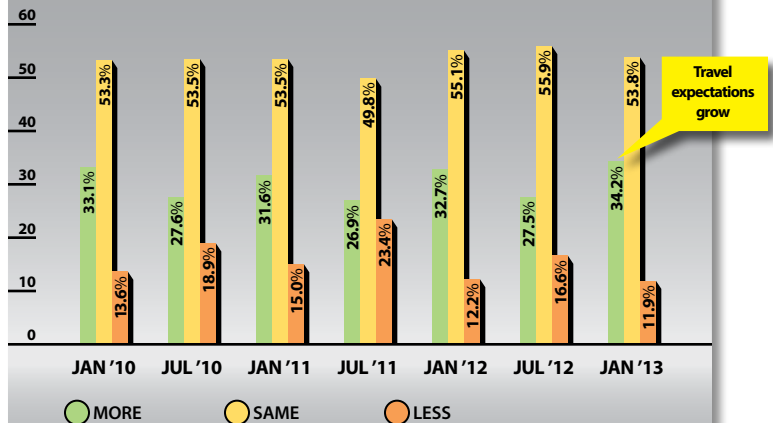
Q How many of these leisure trips included air travel?

Zero.....	50.9%
One.....	24.7%
Two.....	11.8%
Three.....	4.8%
Four or more.....	7.8%
Average.....	1.1

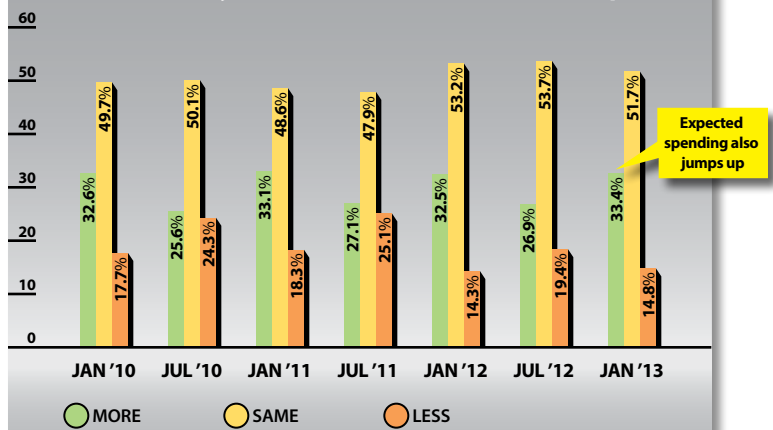
Average number of leisure trips taken (past 12 months)



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?



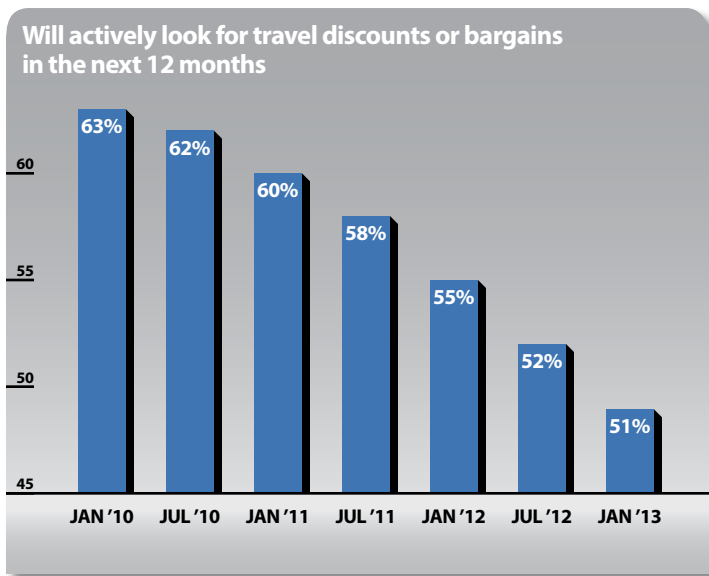
Leisure Travel Expectations Rise

(continued from page 1)

high, with 33.4 percent expecting to increase their leisure travel spending in the coming year, a strong rise from the last survey wave.

Improved financial outlooks and moderate gas prices appear to be driving these positive results. In the current round of our survey, significantly 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. Only 40.9 percent reported that “personal financial reasons” have kept them from traveling more, compared to 47.6 percent six months ago. Similarly, only 40.7 percent said that high gasoline prices have had a similar effect, down from 46.6 percent in July.

The improved financial position of leisure travelers is also shown in their interest in travel deals and discounts. In the past few years, we’ve seen a continued decline in traveler interest in saving money through discounts. As shown in the chart below, the proportion of American leisure travelers who expect to actively look for travel deals and discounts has been consistently declining over the last three years. In January of 2010, nearly two-thirds of travelers said they would actively seek out deals and discounts for their trips. In our most recent poll, about half (50.8%) were so inclined.



Return to the Old Normal? When first measured immediately after the financial crisis of 2008, fully 65.6 percent of American leisure travelers said they would be actively seeking travel discounts and bargains. This figure has dropped dramatically as the economy has recovered.

Reasons for cutting back on leisure travel



	Gasoline was too expensive	Personal financial reasons	Airfare was too expensive	Safety concerns
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%
July 2012	46.6%	47.6%	30.2%	8.6%
January 2013	40.7%	40.9%	32.9%	9.7%

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 40.9%
- Gasoline was too expensive 40.7%
- Airfare was too expensive 30.2%
- I was too busy at work 22.1%
- I didn't have enough vacation time 15.8%
- Safety concerns 9.7%
- Health/illness 7.5%
- Child care responsibilities 6.8%
- I did not have a travel companion(s) . 6.6%
- I travel frequently for business and preferred to stay home 2.3%
- Lack of availability (at hotels, golf courses, spas, etc.) 1.2%

Q In the next 12 months, 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 50.8%
- Visit generally less expensive destinations 22.5%
- Reduce the number of total days I will spend on leisure trip(s) to save money 18.9%
- Reduce the number of leisure trips I will take 17.3%
- Shorten the distance of my trip(s) or reduce side trips along the way to save money 16.8%
- Take at least one “staycation” (a vacation spent at home) rather than travel 16.1%
- Select less expensive mode(s) of transportation 11.9%
- Cancel a trip that I've already begun to plan 4.1%



DESTINATION HOT LIST



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

Las Vegas.....	33.8%	San Diego	8.5%
Orlando/Disney World	31.9%	Boston.....	7.2%
New York City	28.6%	New Orleans	6.5%
Washington, DC.....	11.4%	Atlanta	6.2%
Chicago	10.4%	Anaheim/Disneyland	6.0%
Los Angeles	9.9%	Seattle.....	5.2%
San Francisco.....	8.9%	Philadelphia.....	4.5%
Miami	8.9%	Grand Canyon.....	4.3%

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

France	13.6%	Japan.....	4.8%
United Kingdom	13.2%	Germany	4.5%
Canada	12.5%	China.....	3.3%
Italy.....	11.3%	Jamaica	3.2%
Australia.....	6.8%	Greece.....	3.0%
Mexico	6.3%	Bahamas	2.7%
Spain	5.5%	Holland.....	1.9%
Ireland.....	4.8%	Brazil	1.8%

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



What We Do on Our Leisure Trips

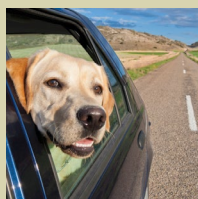
Dine in restaurants	70.3%	Camping	16.7%	Take a day cruise	7.0%
Visit friends or relatives	60.0%	Fishing	16.4%	Canoeing or kayaking	6.2%
Shopping	54.6%	Take a guided tour	15.7%	Astronomy or stargazing.....	5.7%
Go to a beach or lake	44.5%	Drive a designated scenic byway.....	15.5%	Hunting	5.6%
Sightseeing in cities	39.4%	Visit a National Forest	14.7%	Horseback riding.....	5.5%
Visit an historical place or attraction.....	33.6%	Visit a winery	13.7%	ATV or off road vehicles	5.5%
Visit small towns/villages.....	31.8%	Nightclubbing	13.2%	Visit a Revolutionary War battlefield or historic monument/location	5.5%
Visit a theme/amusement park ..	29.7%	Foliage or fall scenery watching ..	11.8%	Hiking trip (1 or more nights on trail).....	5.3%
Sightseeing in rural areas	29.7%	Visit ethnic heritage sites.....	10.7%	White water rafting	5.1%
Casinos/Gambling	28.5%	Spa or hot spring.....	10.5%	Tennis	5.0%
Visit a state or local park	24.8%	Stay in an all-inclusive resort	9.7%	Skiing or snowboarding.....	5.0%
Visit National Parks	22.7%	Sailing or other water sports	8.9%	Mountain biking	4.2%
Day hiking.....	21.0%	Visit a Civil War battlefield or historic monument/location ..	8.5%	Rock climbing.....	3.6%
Art galleries or museums	20.2%	Golf.....	8.0%	Ranch vacation	3.6%
Attend concert, play or musical ..	18.2%	Visit environmental/ecological sites	7.9%	Mountaineering	2.9%
Attend a sporting event.....	17.4%	Bird watching	7.7%		
Attend a family reunion	17.1%				

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)

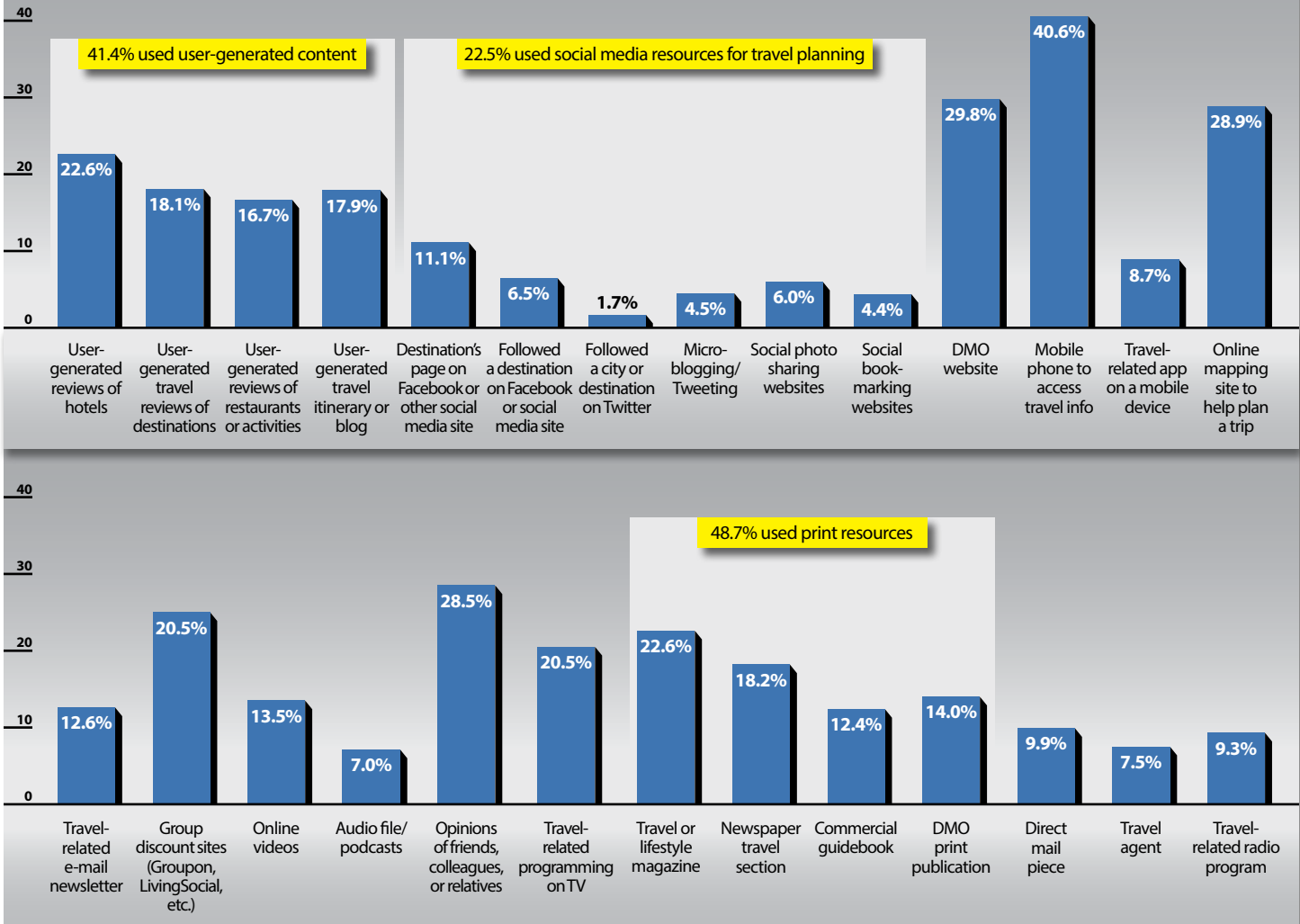


Took laptop computer with me when I traveled for leisure	48.8%
Spent more money than I expected to	42.9%
Used an iPad or other tablet computer to access online travel information	23.3%
Did something totally new and exciting	23.1%
Made a new friend(s)	22.4%
Checked into a place on FourSquare, Facebook, Gowalla or other location based service program (while traveling)	17.6%
Ordered room service in a hotel.....	17.0%
Attended religious services	15.4%
Brought my pet(s) with me	12.2%
Used Facebook post(s) to ask for recommendations and/or advice about leisure travel	11.6%
Took my work with me on vacation	9.7%
Did something risky or dangerous	9.1%
Used the mini bar in a hotel	7.9%
Extended my vacation because I was having so much fun	7.6%
Snapped a QR code to get more information (while traveling)	6.2%
Took a class or educational seminar	5.7%
Met a new romantic partner	5.5%
Went to an adult cabaret, theater or strip club	5.1%

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 to access travel information

DURING a trip(s) 72.5%

BEFORE I left home for a trip(s) 69.6%

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

(Select all that apply)

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

Find hotel information	55.9%
Find restaurant information	54.9%
Check weather	49.5%
Look at maps	47.8%
Use a GPS-related app for directions	40.7%
Find sightseeing or attractions information	34.6%
Find shopping information	31.9%
Check into a flight	23.0%
Check into a hotel	16.4%
Get a mobile boarding pass	14.7%
Research public transportation	12.7%
Use a destination-specific app for travel information	11.5%
Check out of a hotel	10.8%
Buy tickets (to an event, festival, museum, etc.)	6.4%

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 9th, 2013, 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, 1,005 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.