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 travel. 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 unchanged.

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

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?

- More ...................... 33.1%
- Same ...................... 48.6%
- Less ...................... 18.3%

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Leisure Travel Expectations Rise
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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 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.
What are the five domestic destinations that you would most like to visit in the upcoming year?*

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas</td>
<td>33.8%</td>
</tr>
<tr>
<td>Orlando/Disney World</td>
<td>31.9%</td>
</tr>
<tr>
<td>New York City</td>
<td>28.6%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>11.4%</td>
</tr>
<tr>
<td>Chicago</td>
<td>10.4%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>9.9%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>8.9%</td>
</tr>
<tr>
<td>Miami</td>
<td>8.9%</td>
</tr>
<tr>
<td>Grand Canyon</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>13.6%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>13.2%</td>
</tr>
<tr>
<td>Canada</td>
<td>12.5%</td>
</tr>
<tr>
<td>Italy</td>
<td>11.3%</td>
</tr>
<tr>
<td>Australia</td>
<td>6.8%</td>
</tr>
<tr>
<td>China</td>
<td>4.5%</td>
</tr>
<tr>
<td>Jamaica</td>
<td>3.2%</td>
</tr>
<tr>
<td>Greece</td>
<td>3.0%</td>
</tr>
<tr>
<td>Bahamas</td>
<td>2.7%</td>
</tr>
<tr>
<td>Holland</td>
<td>1.9%</td>
</tr>
<tr>
<td>Brazil</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

*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

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 ........................................... 70.3%
- Visit friends or relatives ...................................... 60.0%
- Visit a historical place or attraction ....................... 33.6%
- Visit small towns/villages .................................... 31.8%
- Visit a theme/amusement park ................................ 29.7%
- Sightseeing in rural areas .................................... 29.7%
- Visit a state or local park .................................... 24.8%
- Visit National Parks .......................................... 22.7%
- Day hiking ....................................................... 21.0%
- Art galleries or museums ...................................... 20.2%
- Attend concert, play or musical ................................ 18.2%
- Attend a sporting event ......................................... 17.4%
- Attend a family reunion ........................................ 17.1%
- Camping ........................................................... 16.7%
- Fishing ............................................................ 16.4%
- Take a guided tour ................................................ 15.7%
- Take a day cruise ................................................ 14.7%
- Drive a designated scenic byway .............................. 14.4%
- Visit a winery ..................................................... 13.7%
- Nightclubbing ..................................................... 13.2%
- Foliage or fall scenery watching ............................... 11.8%
- Take a Revolutionary War battlefield or historic monument/location .................. 11.3%
- Visit ethnic heritage sites ..................................... 10.7%
- Spa or hot springs ................................................. 10.5%
- Stay in an all-inclusive resort ................................ 9.7%
- Sailing or other water sports ................................... 8.9%
- Visit a Civil War battlefield or historic monument/location 8.5%
- Golf ................................................................. 8.0%
- Visit environmental/ecological sites .......................... 7.9%
- Bird watching ...................................................... 7.7%
- Mountaineering .................................................. 5.5%
- Take a guided tour ................................................ 5.3%
- Hunting ............................................................. 5.2%
- Horseback riding .................................................. 5.1%
- ATV or off road vehicles ........................................ 5.0%
- Visit a Civil War battlefield .................................... 4.9%
- Hiking trip (1 or more nights on trail) ...................... 4.8%
- Fishing ............................................................. 4.7%
- White water rafting ............................................ 4.7%
- Tennis ............................................................... 4.6%
- Skiing or snowboarding .......................................... 4.5%
- Mountain biking .................................................. 4.4%
- Rock climbing ..................................................... 4.3%
- Ranch vacation .................................................... 4.2%
- Bird watching ...................................................... 4.1%
- Take a day cruise ................................................ 4.0%
- Canoeing or kayaking ........................................... 4.0%
- Astronomy or stargazing ........................................ 4.0%
- Hunting ............................................................. 3.9%
- Horseback riding .................................................. 3.8%
- ATV or off road vehicles ........................................ 3.8%
- Visit a Revolutionary War battlefield or historic monument/location 3.7%
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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%.