



THE STATE OF THE AMERICAN TRAVELER

Traveler Sentiment Improves Slightly

While leisure travel volume remained weak in the first half of 2009, Americans are showing increasing optimism regarding their future leisure travels. In our recent survey of 1,000 American travelers, the average adult reports taking 4.5 leisure trips in the past year; down 4.4 percent from the same poll taken 6 months ago. Despite this decline, 28.4 percent of domestic leisure travelers report that they expect to travel more in the upcoming year. In an identical survey conducted in January, this figure

stood at 20.1 percent. Similar improvements were seen in travel spending expectations. In this most recent survey, 27.4 percent of leisure travelers said they expect to increase their spending on leisure travel in the upcoming year, up from 20.1 percent in January. While the improvements described here are modest, improved traveler sentiment is a needed precursor to a rebound, and an outlook of recovery may be at hand as we move into the year's second half.

SNAPSHOT

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

27%

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	20.8%
Two	19.0%
Three	16.5%
Four	9.8%
Five	7.0%
Six	7.8%
Seven to Ten	11.9%
Eleven to Twenty	6.2%
More than Twenty	1.0%
Average	4.5

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

Zero	47.1%
One	15.1%
Two	12.1%
Three or more	25.7%
Average:	2.1

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

Zero	11.0%
One	22.1%
Two	17.7%
Three	14.0%
Four	8.9%
Five or more	26.3%
Average	3.7

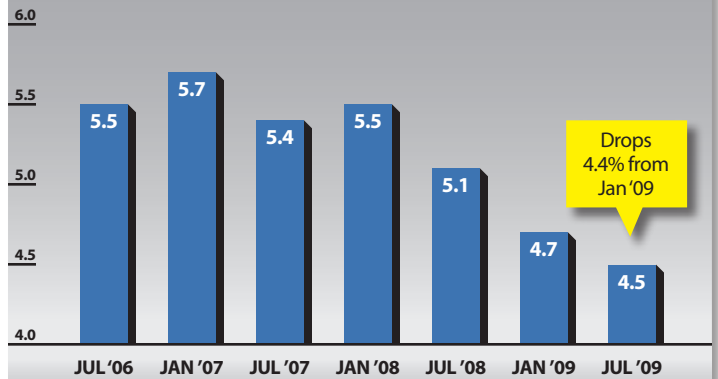
Q How many of these leisure trips included air travel?

Zero	61.9%
One	20.1%
Two	9.7%
Three	3.6%
Four or more	4.7%
Average	0.8

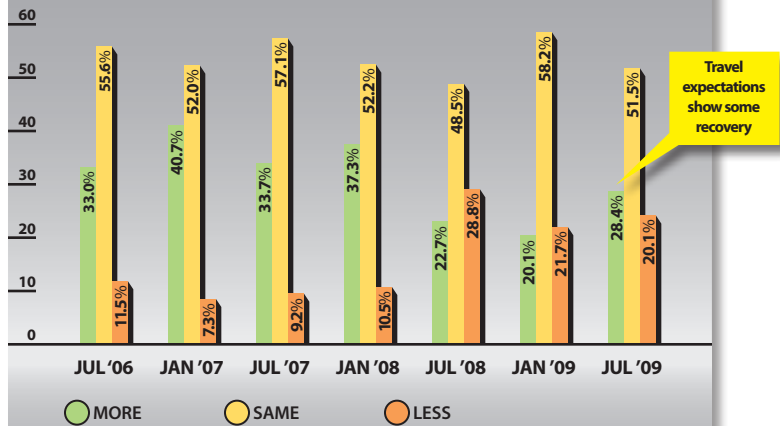
Q How many of these leisure trips included travel outside the United States?

Zero	84.2%
One	10.7%
Two	3.2%
Three or more	1.9%
Average	0.2

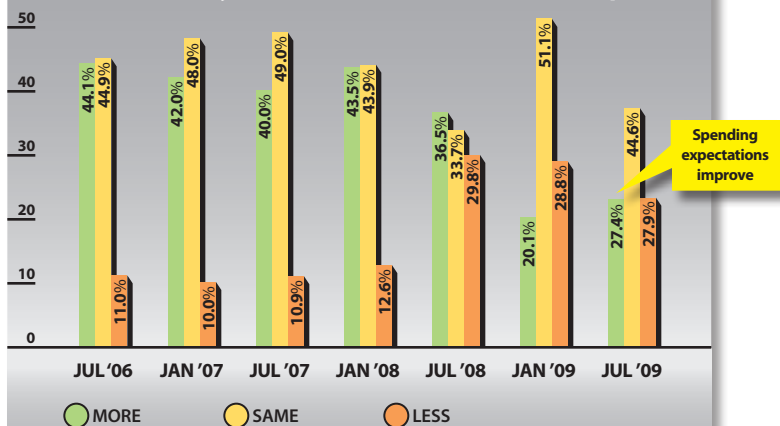
Average number of leisure trips taken (past 12 months)



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?



The Impact of Room Taxes on Leisure Travel

Hotels are a mainstay of leisure travel and an important source of tax revenues for municipalities around the country. Three out of every four leisure travelers (72.9%) report having stayed in a hotel, motel or inn

in the past 12 months, representing a tremendous impact on these tax revenues. For the first time, our survey explored leisure travelers' opinions on hotel room tax rates. In the past 12 months, 16.3 percent of leisure travelers said they had considered a destination's hotel room tax rate when considering a visit (i.e., before deciding to visit the destination.) Similarly, 14.1 percent said they "always" or "frequently" consider a destination's hotel room tax as a factor when selecting their leisure destinations.

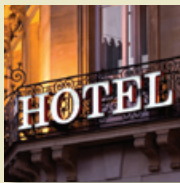
SNAPSHOT

Decided not to stay in a destination because its hotel tax was too high:



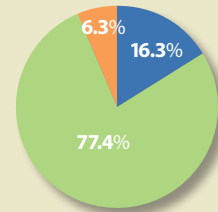
Q In the past 12 months, in which of the following have you stayed while on leisure trips (of 50 miles or more one-way)?

(Select all that apply)



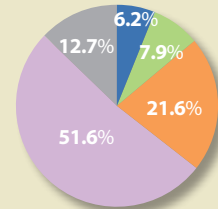
Friend's or relative's home	47.5%
Economy hotel	31.6%
Mid-priced/Extended stay hotel	29.0%
Full service hotel	23.8%
Budget hotel or motel	21.2%
Public campground (camping)	8.8%
Time share property	7.9%
RV, motor home or camper	6.5%
Luxury hotel	6.4%
Bed & breakfast inn	6.4%
Vacation home (rental)	6.2%
Cruise ship	5.7%
Private campground (camping)	4.6%
Spa resort	3.2%
Apartment (rental)	2.3%
Private campground (cabin or yurt)	2.2%
Wilderness lodge	1.6%
Public campground (cabin or yurt)	1.4%
Houseboat	0.4%

Q In the past 12 months, have you specifically considered a destination's hotel room tax rate when considering a visit (i.e., before deciding to visit the destination)?



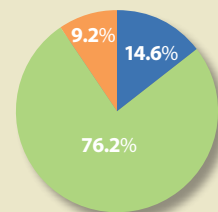
Yes	16.3%
No	77.4%
I don't know	6.3%

Q How often do you consider a destination's hotel room tax as a factor when selecting leisure destinations?



Always	6.2%
Frequently	7.9%
Sometimes	21.6%
Never	51.6%
I don't know/not applicable	12.7%

Q While traveling for leisure, have you ever decided not to stay overnight in a destination specifically because its hotel room tax was too high?



Yes	14.6%
No	76.2%
Not certain	9.2%

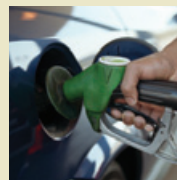
Reasons for cutting back on leisure travel



	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%

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?



Personal financial reasons	66.4%
Gasoline was too expensive	56.5%
Airfare was too expensive	32.7%
I was too busy at work	26.6%
I didn't have enough vacation time	19.1%
Health/Illness	10.0%
Child care responsibilities	9.1%
Safety concerns	6.5%
Other personal responsibilities	5.2%
I did not have a travel companion(s)	5.1%
I travel frequently for business and preferred to stay home	1.4%
Lack of availability (at hotels, golf courses, spas, etc.)	1.4%

Travel fact: Work gets in the way, even during recessions. In the past 6 months, the percent of respondents who report having cut back on their leisure travels because they were "too busy at work" grew from 19.1% to 26.6%.

DESTINATION HOT LIST



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

Las Vegas	29.1%	Miami	8.3%
New York City	26.8%	Grand Canyon NP	7.6%
Orlando/Disney World	19.7%	Seattle.....	6.6%
Washington DC	14.0%	Atlanta	5.8%
San Diego	11.6%	Myrtle Beach	5.1%
Los Angeles	11.3%	Boston.....	5.0%
San Francisco.....	10.6%	New Orleans	4.7%
Chicago	8.7%	Yellowstone NP.....	4.3%

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

United Kingdom	16.0%	Australia.....	7.2%
Italy.....	15.6%	Greece.....	4.4%
France	13.3%	Japan.....	3.8%
Canada.....	12.4%	Jamaica	3.0%
Mexico	12.1%	China / Hong Kong.....	2.8%
Ireland.....	8.6%	Brazil	2.7%
Germany	8.1%	Bahamas	2.3%
Spain	7.4%	New Zealand.....	1.8%

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

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)?



Dine in restaurants	78.7%	Camping	21.7%	Visit environmental/ ecological sites	6.6%
Visit friends or relatives.....	68.8%	Attend a sporting event.....	21.0%	Take a day cruise	6.5%
Shopping	66.2%	Nightclubbing	20.5%	ATV or off road vehicles	6.5%
Go to a beach or lake	56.3%	Fishing	20.1%	Day hiking.....	17.4%
Sightseeing in cities	49.3%	Take a guided tour	16.1%	Horseback riding.....	6.2%
Visit an historical place or attraction.....	42.0%	Visit a National Forest	14.0%	Canoeing or kayaking.....	5.4%
Visit small towns/villages.....	41.7%	Visit a winery	13.7%	Hunting	4.5%
Sightseeing in rural areas	38.2%	Foliage or fall scenery watching ..	11.9%	Visited a Revolutionary War battlefield or historic monument/location	4.4%
Casinos/gambling.....	34.8%	Visit ethnic heritage sites.....	11.6%	Mountain biking	3.7%
Visit a theme/amusement park ..	34.4%	Stay in an all-inclusive resort	10.9%	White water rafting	3.4%
Visit a state or local park	29.8%	Sailing or other water sports	10.9%	Tennis	3.1%
Attend concert, play or musical ..	25.2%	Golf.....	8.8%	Skiing or snowboarding.....	3.1%
Art galleries or museum	24.8%	Visited a Civil War battlefield or historic monument/location ...	8.4%	Hiking trip (1 or more nights on trail) ..	3.0%
Drive a designated scenic byway.....	24.8%	Spa or hot spring.....	8.2%	Rock climbing	2.2%
Visit National Parks	24.7%	Astronomy or stargazing.....	6.9%	Ranch vacation	1.3%
Attend a family reunion	21.7%	Bird watching	6.8%	Mountaineering	0.7%

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

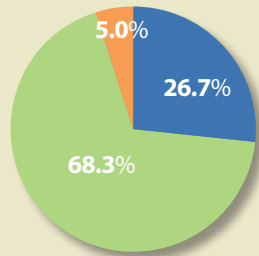
(Select all that apply)



Spent more than expected.....	63.0%
Took a laptop computer when traveling for leisure	32.0%
Did something totally new and exciting	30.5%
Made a new friend(s)	30.4%
Used a mobile phone/PDA to access online travel information.....	21.7%
Traveled specifically to get away from my work	18.7%
Ordered room service in a hotel.....	17.2%
Attended religious services	17.1%
Did something risky or dangerous	13.3%
Brought my pet(s) with me	11.6%
Purchased a travel package	9.7%
Traveled specifically to spend time away from someone	9.0%
Extended my vacation because I was having so much fun	8.7%
Brought own meal on an airline	7.5%
Used the mini bar in a hotel	6.9%
Took my work with me on vacation	6.5%
Traveled in an organized group tour	5.8%
Took a class or educational seminar	5.2%
Went to an adult cabaret, theater or strip club	4.7%
Met a new romantic partner	4.3%
Came home early because I was bored	3.0%
Traveled to meet (for the first time) some one I met online	2.6%

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?

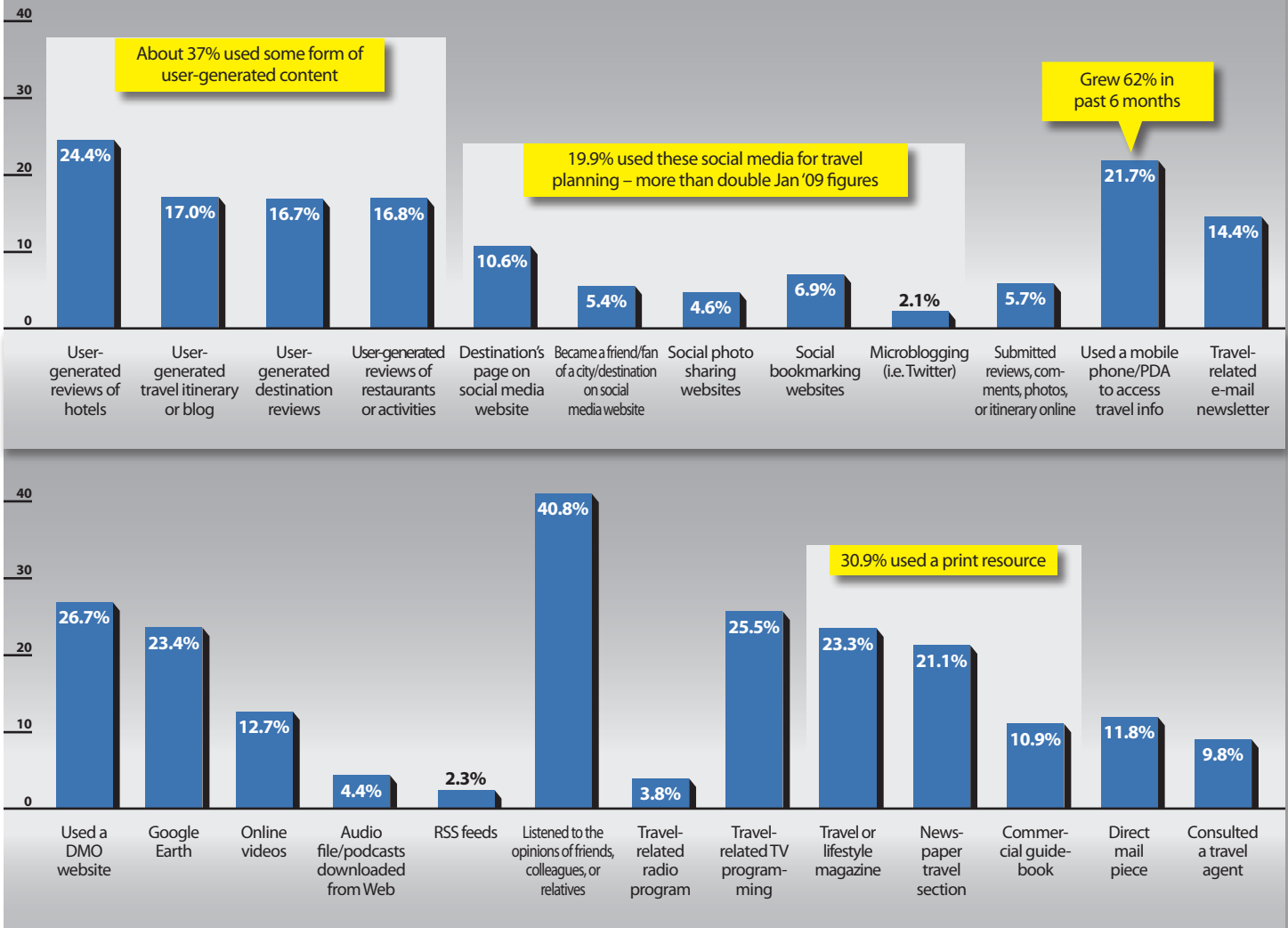


Yes 26.7%
 No 68.3%
 I don't know 5.0%

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 to stay 45.6%
 Booked a hotel (or lodging) 42.9%
 Selected attractions or things to see and do in a destination 39.1%
 Purchased airline tickets 33.5%
 Read about local culture, arts, heritage or events of a destination 33.2%
 Decided to visit a particular destination 31.5%
 Selected a restaurant or place to eat in a destination I was planning to visit ... 30.1%
 Selected an airline 29.4%
 Decided how long I would stay at a destination 24.8%
 Booked a rental car 21.4%
 Selected a car rental company 19.0%

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 June 28th to July 1st, 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, 1,000 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.