



# THE STATE OF THE AMERICAN TRAVELER™

## Leisure Travel Outlook Weakens

Americans' expectations for their future travel and travel spending appear to have waned since January. Six months ago, the percent of American travelers saying they expected to increase the

number of leisure trips they would take in the coming year stood at 33.1; in this most recent survey, this has fallen to 27.6 percent. Meanwhile, the percent of American leisure travelers expecting to cut back on their travel has risen to 18.9 percent, versus 13.6 percent in January. Regression was also seen in leisure travel spending expectations. In January, 32.6 percent of leisure travelers said they expected to increase their travel spending in the next 12 months—just 25.6 percent said the same in July.

### SNAPSHOT

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



**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.....	20.5%
Two.....	22.4%
Three.....	12.8%
Four.....	10.2%
Five.....	9.3%
Six.....	6.4%
Seven to Ten.....	8.8%
Eleven to Twenty.....	6.3%
Twenty One to Thirty.....	2.0%
More than Thirty.....	1.0%
<b>Average.....</b>	<b>4.9</b>

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

Zero.....	39.9%
One.....	18.5%
Two.....	14.0%
Three or more.....	27.7%
<b>Average:.....</b>	<b>2.3</b>

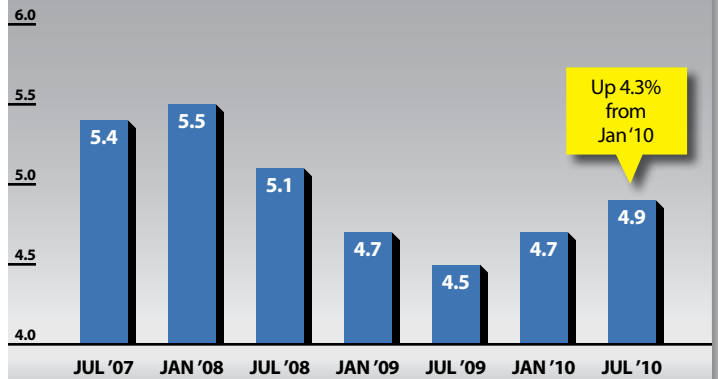
**Q** How many of these leisure trips were primarily by automobile?

Zero.....	10.5%
One.....	25.2%
Two.....	20.0%
Three.....	11.1%
Four.....	7.8%
Five or more.....	25.5%
<b>Average.....</b>	<b>3.3</b>

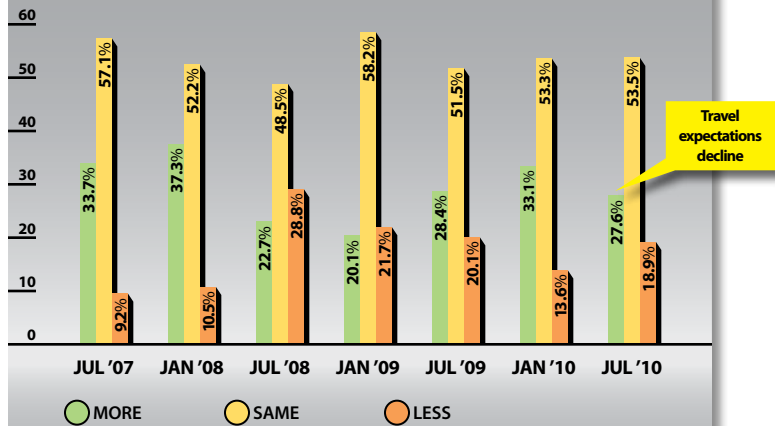
**Q** How many of these leisure trips included travel outside the United States?

Zero.....	78.3%
One.....	14.5%
Two.....	3.6%
Three or more.....	3.6%
<b>Mean.....</b>	<b>0.4</b>

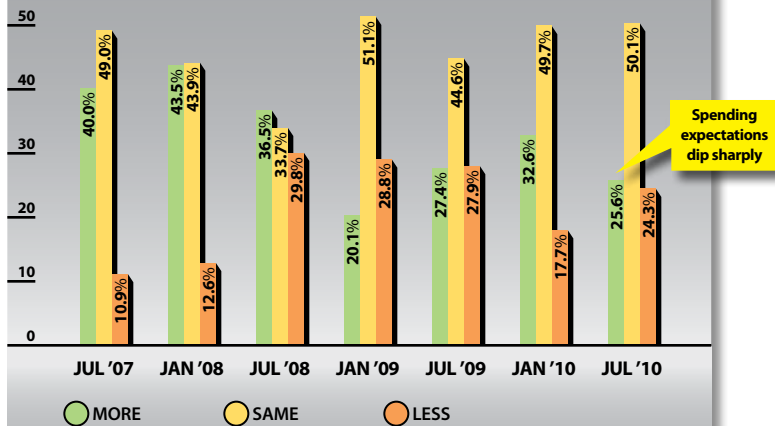
Average number of leisure trips taken (past 12 months)



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?



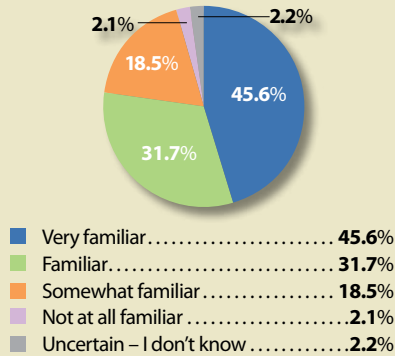
In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?



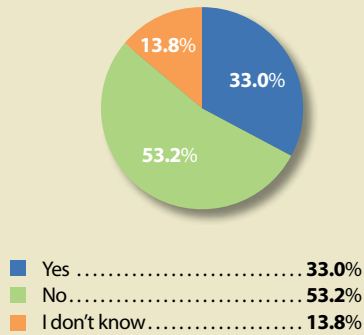
# Impact of Oil Spill on Gulf Coast States

The survey also looked into the potential effects of the Gulf oil spill on travel. One third of Americans feel the spill will effect the likelihood they will travel in the Gulf Coast region in the next year. Eighty percent of this group (or 26.4 percent of all leisure travelers) said they were either "Less likely" or "Much less likely" to visit the region.

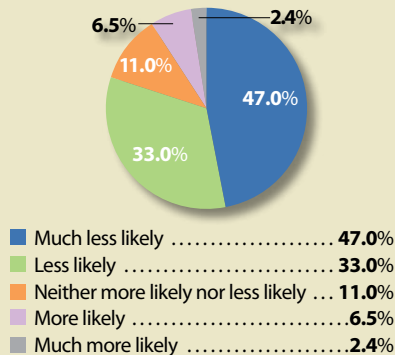
**Q** How familiar are you with the news coverage related to the BP/Deepwater Horizon oil spill?



**Q** Do the after effects of this oil spill in any way effect the likelihood that you will visit or travel within the Gulf Coast states (Texas, Louisiana, Mississippi, Alabama or Florida) in the NEXT TWELVE (12) MONTHS?

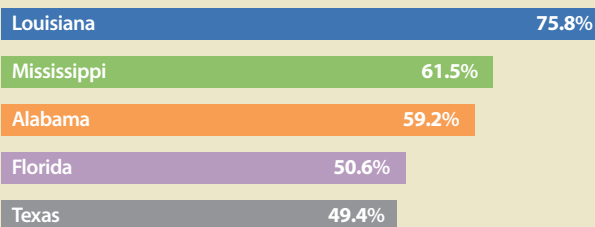


**Q** How will the oil spill effect the likelihood that you will visit or travel within the Gulf Coast states in the NEXT TWELVE (12) MONTHS?



*\*Asked only of respondents who felt the oil spill effected the likelihood of travel to the Gulf Coast region.*

**Q** Which of the Gulf Coast states would you be less likely to visit (or travel within) as a result of the oil spill? (Select all that apply)



*\*Asked only of respondents who felt the oil spill would make them "Less likely" or "Much less likely" to travel to or within the Gulf Coast region.*

## Reasons for cutting back on leisure travel



	Gasoline was too expensive	Personal financial reasons	Airfare was too expensive	Safety concerns
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%
January 2010	41.6%	56.6%	31.8%	12.0%
July 2010	40.7%	55.9%	36.0%	8.4%

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 ..... 55.9%
- Gasoline was too expensive ..... 40.7%
- Airfare was too expensive ..... 36.0%
- I was too busy at work ..... 27.9%
- I didn't have enough vacation time ..... 20.8%
- Child care responsibilities ..... 9.9%
- Health/Illness ..... 9.8%
- Safety concerns ..... 8.4%
- Other personal responsibilities ..... 6.7%
- I didn't have a travel companion(s) ..... 6.5%
- Lack of availability ..... 3.6%

**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 ..... 61.9%
- Visit generally less expensive destinations ..... 29.3%
- Reduce the number of leisure trips I will take ..... 23.8%
- Take at least one "staycation" ..... 22.6%
- Reduce total days spent on leisure trip(s) ..... 22.1%
- Shorten the distance of my trip(s) or reduce side trips along the way to save money ..... 20.8%
- Select less expensive mode(s) of transportation ..... 18.0%
- Cancel a trip that I've already begun to plan ..... 4.2%

**Travel Fact:** Despite economic improvements, Americans are still staycating. As was reported last January, almost one in four (22.6%) American travelers expects to take at least one staycation in the upcoming year.

# DESTINATION HOT LIST



## What are the five domestic destinations that you would most like to visit in the upcoming year? (Write in up to five)

Las Vegas .....	30.6%	Miami .....	7.7%
New York City .....	26.5%	Seattle .....	6.9%
Orlando/Disney World .....	18.5%	Boston .....	6.6%
San Francisco .....	13.4%	Anaheim/Disneyland .....	5.9%
Chicago .....	12.8%	New Orleans .....	5.6%
San Diego .....	12.2%	Dallas .....	5.6%
Washington DC .....	11.8%	Grand Canyon .....	5.2%
Los Angeles .....	9.3%	Atlanta .....	5.2%

## What are the five foreign countries that you would most like to visit in the upcoming year? (Write in up to five)

Canada .....	16.5%	Ireland .....	5.6%
United Kingdom .....	15.5%	Spain .....	5.6%
Mexico .....	14.2%	Jamaica .....	4.6%
France .....	13.7%	China .....	3.6%
Italy .....	13.3%	Greece .....	3.1%
Germany .....	7.4%	Bahamas .....	3.1%
Australia .....	7.1%	Brazil .....	2.7%
Japan .....	5.7%	Costa Rica .....	2.2%



## What We Do on Our Leisure Trips

Dine in restaurants .....	74.1%	Attend a family reunion .....	21.1%	Visit environmental/ ecological sites .....	8.3%
Shopping .....	65.5%	Attend a sporting event .....	20.8%	Astronomy or stargazing .....	7.9%
Visit friends or relatives .....	64.7%	Fishing .....	20.3%	Horseback riding .....	7.1%
Go to a beach or lake .....	52.5%	Nightclubbing .....	19.9%	ATV or off road vehicles .....	6.5%
Sightseeing in cities .....	48.0%	Take a guided tour .....	19.0%	Visit a Revolutionary War battlefield or historic monument/location .....	6.4%
Visit an historical place or attraction .....	42.8%	Visit a National Forest .....	17.0%	Hiking trip (1 or more nights on trail) .....	6.3%
Visit small towns/villages .....	39.1%	Visit a winery .....	16.5%	Tennis .....	5.2%
Sightseeing in rural areas .....	34.7%	Foliage or fall scenery watching ..	14.8%	Mountain biking .....	5.2%
Casinos/Gambling .....	34.5%	Visit ethnic heritage sites .....	13.6%	Skiing or snowboarding .....	5.2%
Visit a theme/amusement park ..	32.8%	Stay in an all-inclusive resort .....	12.8%	Hunting .....	5.0%
Visit a state or local park .....	32.6%	Spa or hot spring .....	11.7%	White water rafting .....	4.7%
Visit National Parks .....	28.8%	Take a day cruise .....	11.2%	Rock climbing .....	4.0%
Art galleries or museum .....	27.9%	Take a day cruise .....	11.2%	Ranch vacation .....	2.8%
Attend concert, play or musical ..	27.2%	Sailing or other water sports .....	11.2%	Mountaineering .....	2.6%
Day hiking .....	25.1%	Visit a Civil War battlefield or historic monument/location ..	10.7%		
Camping .....	24.1%	Golf .....	9.9%		
Drive a designated scenic byway ..	23.9%	Canoeing or kayaking .....	8.7%		
		Bird watching .....	8.4%		

## 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)?

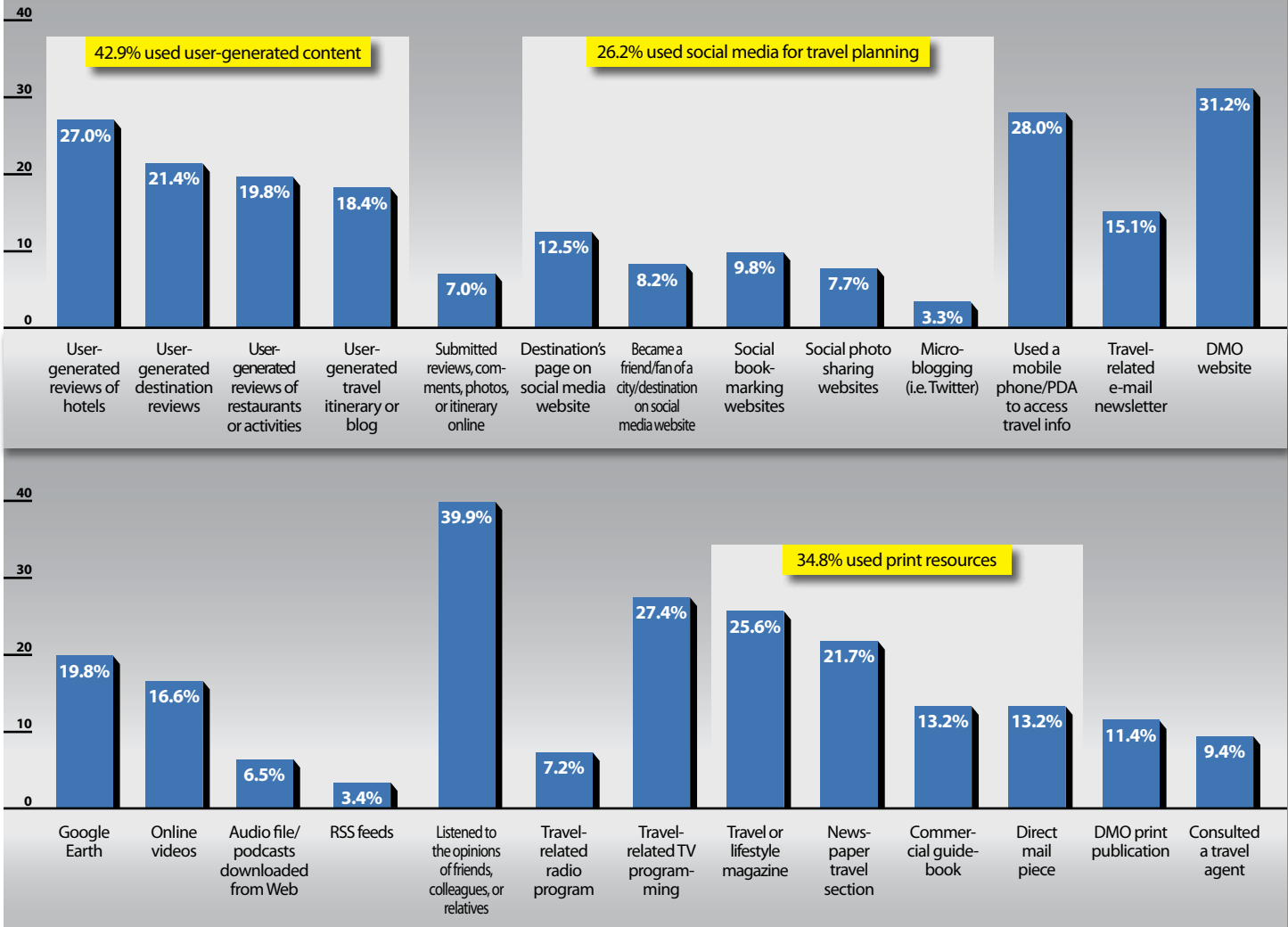
(Select all that apply)



Spent more money than I expected to .....	53.2%
Took a laptop computer with me when I traveled for leisure .....	39.1%
Used a mobile phone, PDA or handheld device to access online travel information .....	28.0%
Did something totally new and exciting .....	27.0%
Made a new friend(s) .....	25.2%
Traveled specifically to get away from my work .....	19.8%
Ordered room service in a hotel .....	19.4%
Attended religious services .....	16.5%
Did something risky or dangerous .....	13.6%
Brought my pet(s) with me .....	12.5%
Took my work with me on vacation .....	10.5%
Brought my own meal on an airline .....	10.4%
Traveled specifically to spend time away from someone .....	10.0%
Extended my vacation because I was having so much fun .....	9.7%
Used the mini bar in a hotel .....	9.1%
Purchased a travel package .....	8.6%
Took a class or educational seminar .....	7.2%
Traveled in an organized group tour .....	6.3%
Went to an adult cabaret, theater or strip club .....	5.4%
Came home early because I was bored .....	4.4%
Met a new romantic partner .....	4.2%
Traveled to meet (for the first time) someone I was introduced to online .....	3.6%

# TRAVEL & TECHNOLOGY

## Technologies, Resources and Services Used to Plan Leisure Travel



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

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

During a trip (or trips) 85.3%

Before leaving home for a trip(s) 58.6%

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

(Select all that apply)

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

Find restaurant information	62.1%
Check weather	55.8%
Look at maps	49.1%
Use a GPS-related app for directions	48.1%
Find hotel information	46.0%
Find shopping information	36.1%
Find sightseeing or attractions information	33.3%
Check into a flight	23.9%
Research public transportation	12.6%
Check into a hotel	11.2%
Use a destination-specific app for travel info	9.5%
Get a mobile boarding pass	8.8%
Buy tickets	8.1%
Check out of a hotel	6.7%

**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 June 29th to July 1st 2010, 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, 1,018 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.