



THE STATE OF THE AMERICAN TRAVELER™

Leisure Travel Expectations Weaken

Battered by continued economic uncertainty and high gas prices, American expectations for future leisure travel weakened in June.

In our latest survey, the proportion of travelers who expect to increase their leisure travels in the next twelve months dropped to 27.5 percent, down from 32.7 percent six months earlier. 16.6 percent of those surveyed expect to reduce their travels, up from 12.2 percent six months ago. Still, a majority of American leisure travelers (55.9%) plan to hold their leisure travel steady in the coming year.

SNAPSHOT

Americans planning to increase 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.....	24.3%
Two.....	23.1%
Three.....	11.7%
Four.....	10.1%
Five.....	8.4%
Six.....	6.9%
Seven to Ten.....	8.5%
Eleven to Twenty.....	5.3%
Twenty One to Thirty.....	1.0%
More than Thirty.....	0.7%
Average.....	4.6

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

Zero.....	39.5%
One.....	20.2%
Two.....	14.0%
Three or more.....	26.3%
Average.....	2.2

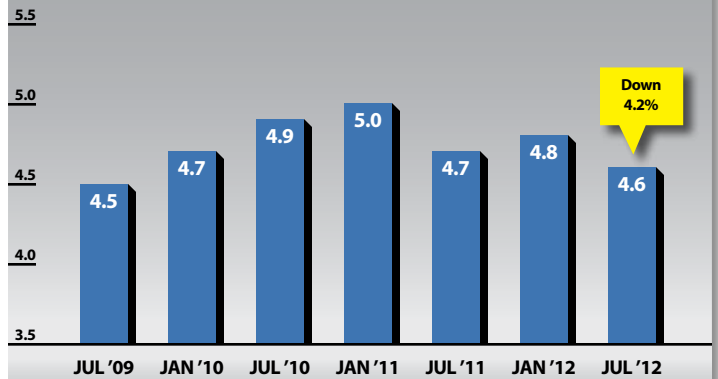
Q How many of these leisure trips were primarily by automobile?

Zero.....	12.4%
One.....	24.8%
Two.....	20.1%
Three.....	11.7%
Four.....	7.9%
Five or more.....	22.9%
Average.....	3.2

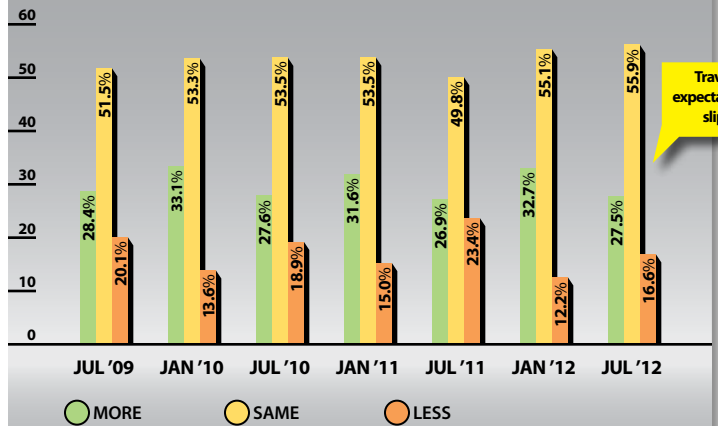
Q How many of these leisure trips included air travel?

Zero.....	56.5%
One.....	20.7%
Two.....	12.0%
Three.....	3.9%
Four or more.....	6.9%
Average.....	0.9

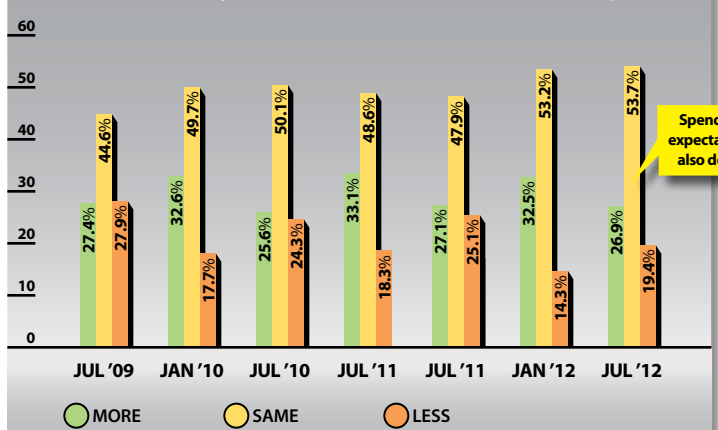
Average number of leisure trips taken (past 12 months)



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?

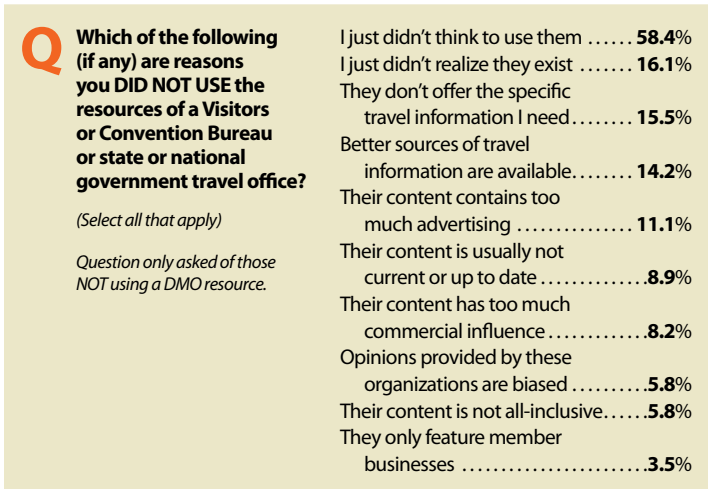
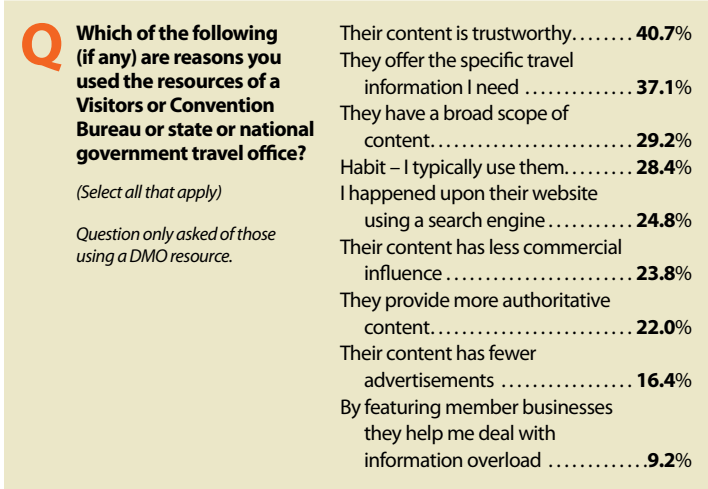
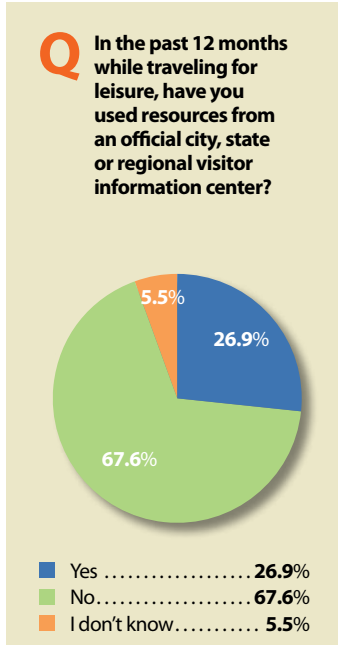
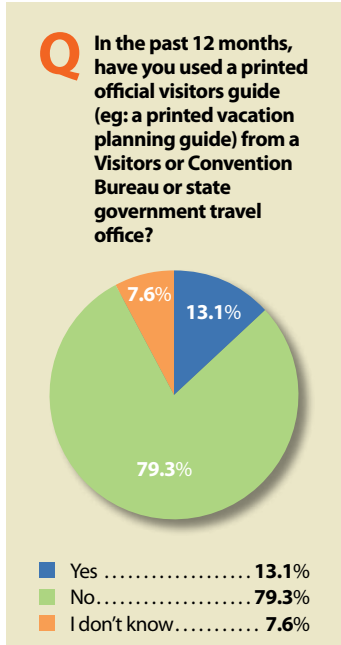
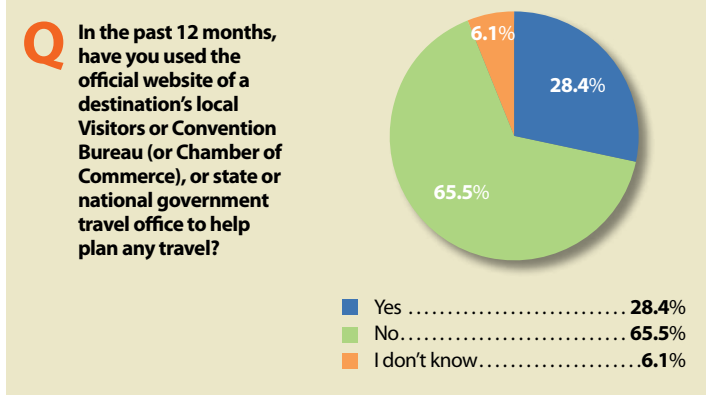


In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?



Travelers and the Modern Destination Marketing Organization

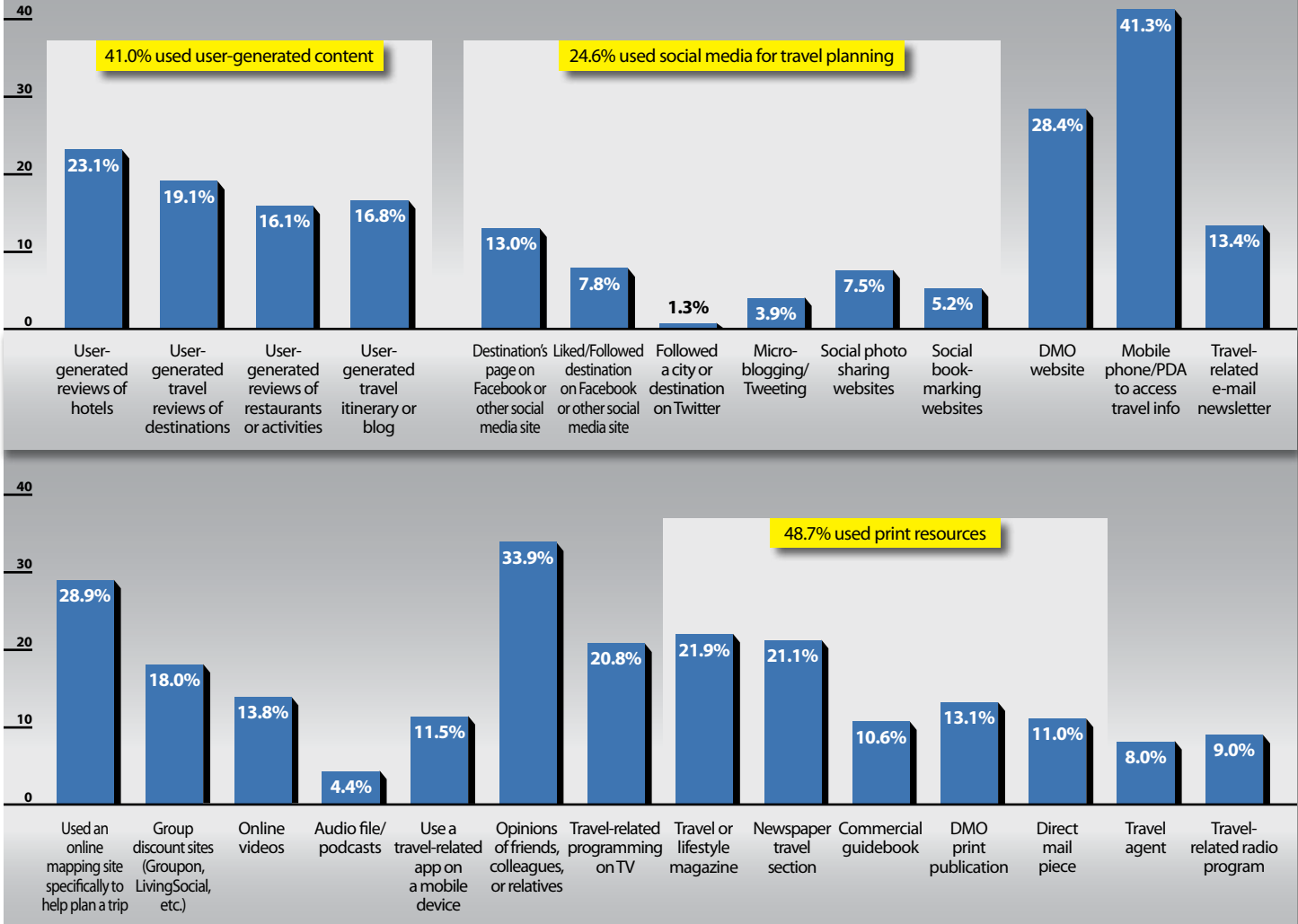
Destination marketing organizations (DMOs) are an important resource many American travelers rely on to plan their travels. In the past year, over 40 percent of leisure travelers report using the resources of a DMO in their travel planning. This includes using DMO websites (28.4%), printed visitor guides (13.1%) and visitor information centers (26.9%). When asked to select the words that best describe these organizations, “helpful,” “informational,” “knowledgeable” and “friendly” are most popular. The DMO Word Cloud (at right) illustrates the words leisure travelers say are most descriptive of convention & visitors bureaus. Despite significant market penetration and generally positive feelings from travelers, traveler awareness of DMO products and services appears to be a serious issue. When survey respondents were asked why they didn’t use DMOs, the most frequent response was either that they “just didn’t think to use them” or “didn’t realize they exist.”



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) **78.5%**

BEFORE I left home for a trip(s) **63.0%**

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	55.0%
Check weather	52.3%
Look at maps	42.9%
Find hotel information	41.4%
Use a GPS-related app for directions	40.0%
Find shopping information	34.9%
Find sightseeing or attractions information	26.6%
Check into a flight	19.6%
Check into a hotel	11.4%
Get a mobile boarding pass	10.9%
Research public transportation	10.7%
Check out of a hotel	9.0%
Use a destination-specific app for travel information	8.2%
Buy tickets (to an event, festival, museum, etc.)	7.7%

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 14th through June 21st, 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, 1,000 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.1%.

THE AMERICAN TRAVELER: SIMPLIFIED

Leisure Travel Basics

How we enjoyed ourselves in the past year

4.6	Number of leisure trips taken on average
48%	of these trips were day trips
7.1	Average # of hours spent planning most recent trip
84%	of these planning hours were spent online
41%	Used a mobile phone to help plan a leisure trip
1/5	Did not use a computer to plan their most recent trip
\$1008	Average total spending on most recent trip
1/10	Financed a vacation entirely on credit
48%	Spent more money than expected on a leisure trip
1/10	Think they are a "more demanding" traveler than most people
46%	Cut back on travel due to high gas prices
1/5	Traveled outside the United States
18%	Took at least one "staycation"
1/3	Visited a casino while traveling
1/4	Visited a National Park
15%	Attended religious services while on vacation
57%	Visited a friend or relative on a leisure trip
1/20	Met a new romantic partner while traveling
12%	Visited a specific destination after getting inspiration to do so on Facebook



A Mobile Nation. The use of cell phones specifically for travel planning has doubled in the past three years. The importance of effective mobile marketing has never been greater, and is critical at all stages of travel planning. Travelers who use their cell phones to plan their trips do so while traveling (79%) as well as before they leave home (63%). Travelers use their mobile devices to gather all types of information, with the most common being restaurants (55%), weather (52%), maps (43%) and hotels (41%).

On the Road. America's car culture drives our travel industry. Approximately 7 of 10 leisure trips are taken primarily by automobile, highlighting the tremendous importance of gas prices to travel decision making. The remaining 30 percent of trips are primarily taken by airline, with train and cruise trips being relatively less common modes of transport.



Hot Spots. We asked Americans where they would most like to travel in the next year, and three destinations far surpassed all others in popularity.



Las Vegas, New York City and Orlando are clearly our hottest vacation spots



What does this tell us about the travel experiences we most desire?