

THE STATE OF THE AMERICAN TRAVELER

Destination Analysts

Destinations Edition
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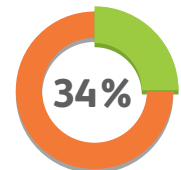
Destinations Poised for Success in 2016

American destinations can expect high levels of excitement around leisure travel segments this year. In our latest Destinations Edition of this study, 34.2 percent of travelers said that they will increase the number of leisure trips taken this year, up from 31.1 percent one year earlier. 34.4 percent also now plan to devote more money to travel. Demand for leisure travel is strong across regions, destination types and income brackets, but is most pronounced amongst younger, urban residents.

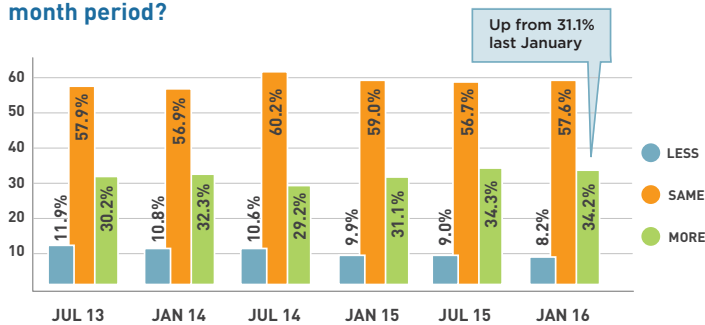
Sponsored By **miles**
marketing destinations

SNAP SHOT

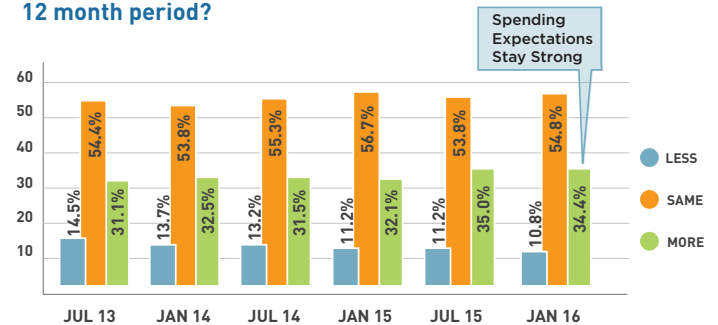
Americans planning to **increase** leisure travel **spending** in the next 12 months



Q: 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?



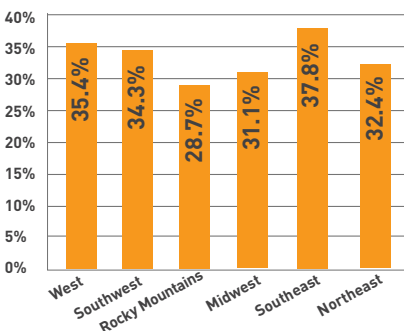
Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?



Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

Region of Residence

(% region planning to travel more)



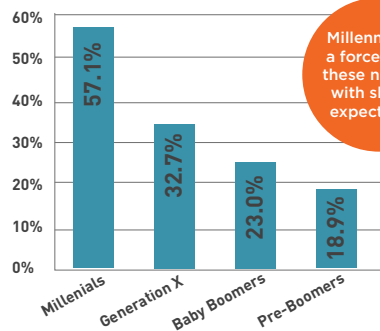
Annual Household Income

(% income planning to travel more)



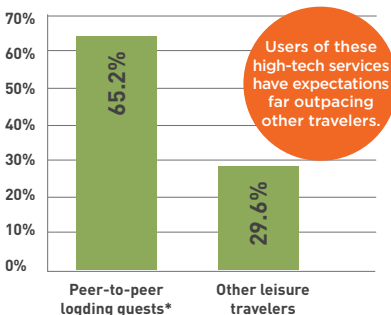
Generations

(% age planning to travel more)



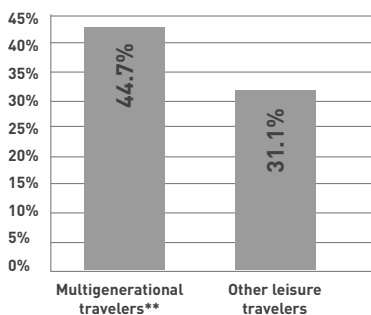
Peer-to-Peer Lodging Guests

(% planning to travel more, comparison)



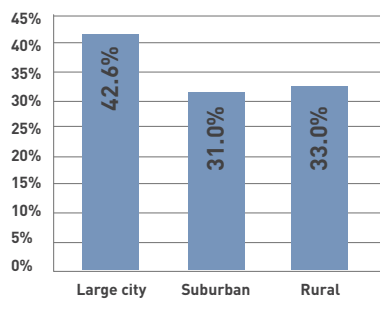
Multi-Generational Travelers

(% planning to travel more, comparison)



Place of Residence

(% planning to travel more, comparison)

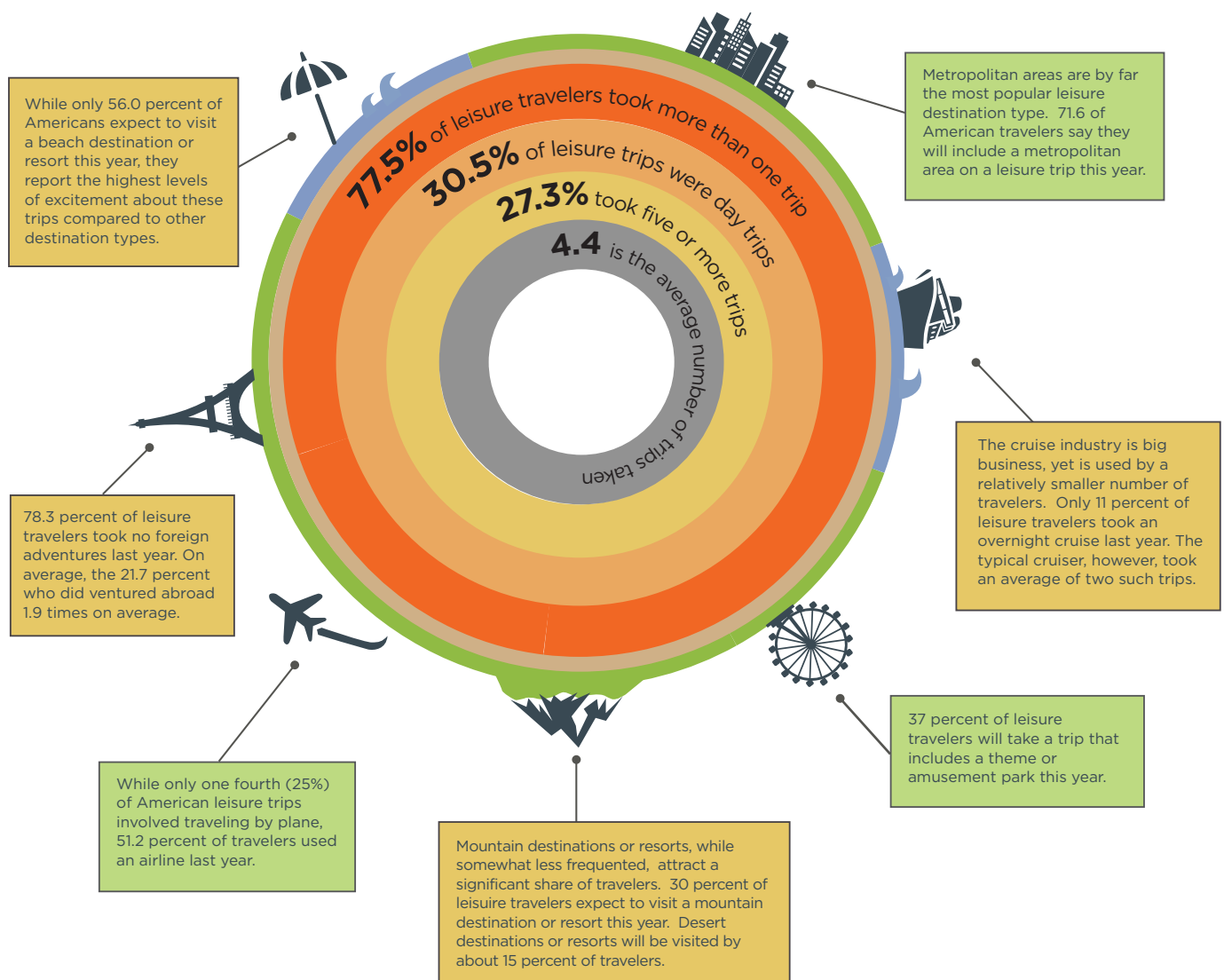


*Travelers using a website such as Airbnb, HomeAway or VRBO to book leisure accommodations in past 12 months

**Travelers taking a trip that included at least three generations of travelers in past 12 months.

How do Americans Travel?

The vast majority of Americans are leisure travelers who have taken at least one trip (50 miles+ from home) in the past year. On average, Americans took 4.4 trips; with about one third taking five or more. Cities and metropolitan areas are by far the most visited destination type, with nearly three out of four of us planning to visit one this year. The second most frequented destination type will be “small towns, villages or rural destinations/attractions,” with the average traveler visiting 1.1 such places in 2016. Beach destination and resorts will generate fewer visits, but still more than half of Americans will include them in our 2016 itineraries. Below are some fun facts on how Americans got away last year and how we plan to travel in 2016.



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 4th to 10th, 2016, 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, 2,010 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.19%. This information is provided “as is” and intended for informational purposes only. It should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Destination Analysts is not responsible for your use of the information contained herein (including errors, omissions, inaccuracy or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.

LEISURE TRAVEL FUN FACTS

Americans took an average of 4.4 leisure trips last year. Here are some highlights of how they traveled.



45%
No Day
Trips

45% of American leisure travelers took only overnight trips during 2016.



22%
Stay-
Cation

Staycations are still popular. These vacations spent at home (rather than traveling) seem to be here to stay.



1.6
Regional
Trips

36% of the average 4.4 total trips taken were 200 or fewer miles from home.



32%
National
Parks

About a third of Americans say they will enjoy one of our National Parks this year.



7%
Bigger
Budgets

The average traveler said they could budget as much as \$3,445 for leisure travel this year, up 7% from one year ago.



23%
Multi-Gen
Trips

Almost one quarter of adults (23%) traveled with 3+generations in a travel party--averaging 2 such trips in the year.

Reasons for cutting back on leisure travel



GAS TOO
EXPENSIVE



PERSONAL
FINANCIAL



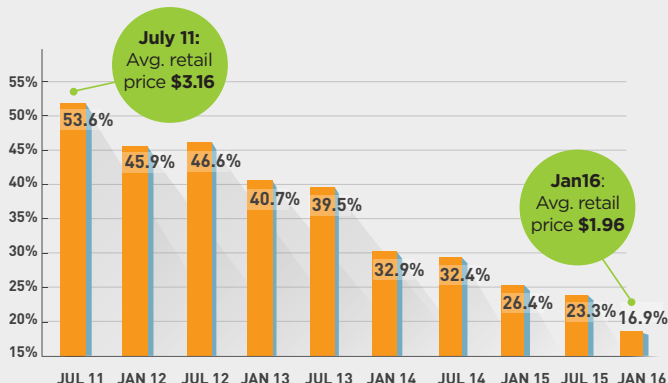
AIRFARE TOO
EXPENSIVE



SAFETY
CONCERNS

	GAS TOO EXPENSIVE	PERSONAL FINANCIAL	AIRFARE TOO EXPENSIVE	SAFETY CONCERNS
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%
JULY 2013	39.5%	38.6%	27.1%	9.5%
JANUARY 2014	32.9%	41.1%	25.6%	9.5%
JULY 2014	32.4%	36.8%	24.0%	9.9%
JANUARY 2015	26.4%	35.7%	19.6%	9.5%
JULY 2015	23.2%	35.8%	20.6%	10.8%
JANUARY 2016	16.9%	38.5%	22.8%	10.8%

LEISURE TRAVEL & GAS PRICES Continued improvement

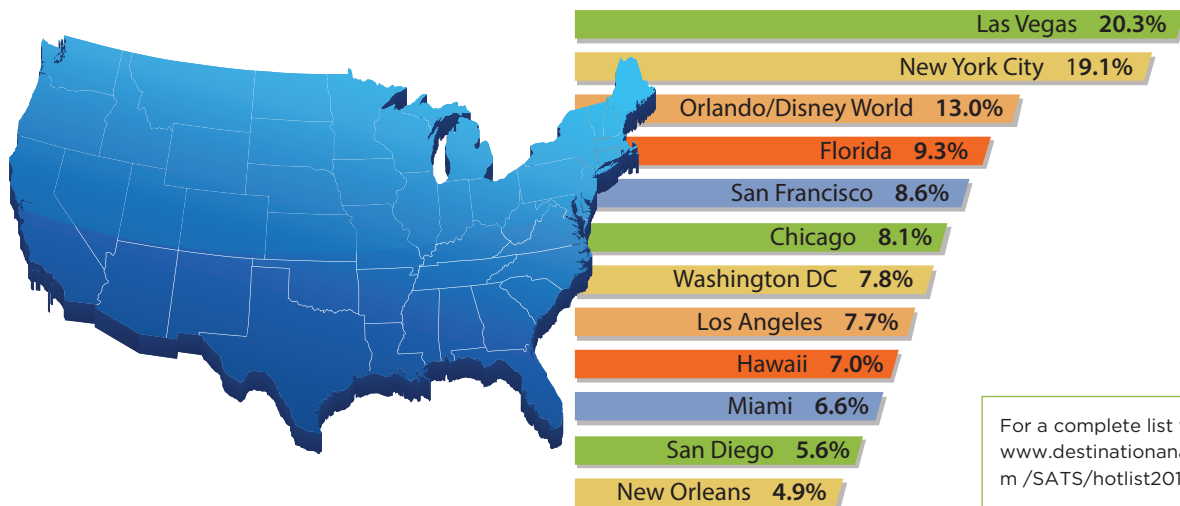


PRICES AT THE PUMP ARE A NON-ISSUE

Most leisure travel continues to be by car, the price of gasoline had traditionally been a key factor in trip decision making. Things have changed radically, driven by recent downward trends in gas prices. Fewer and fewer American travelers are now saying that high gasoline prices are causing them to reduce their travels. From a high of 53.6 percent in 2011, the proportion of American travelers cutting back on their travel due to gas prices fell to 16.9 percent in the most recent survey.

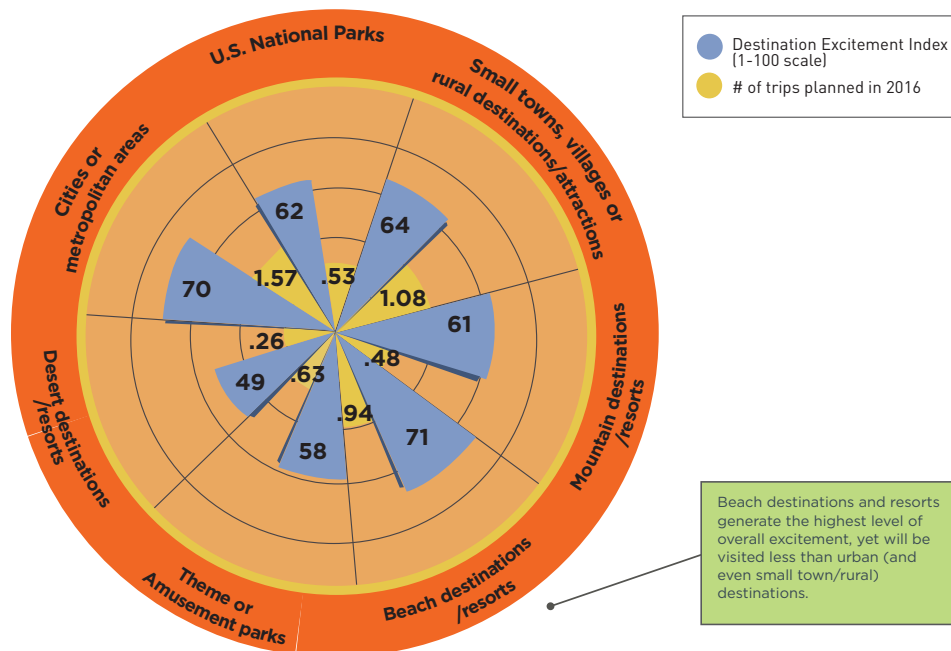
Most Desired U.S. Destinations — 2016

What are the five domestic destinations that you would most like to visit in the upcoming year? (OPEN ENDED)



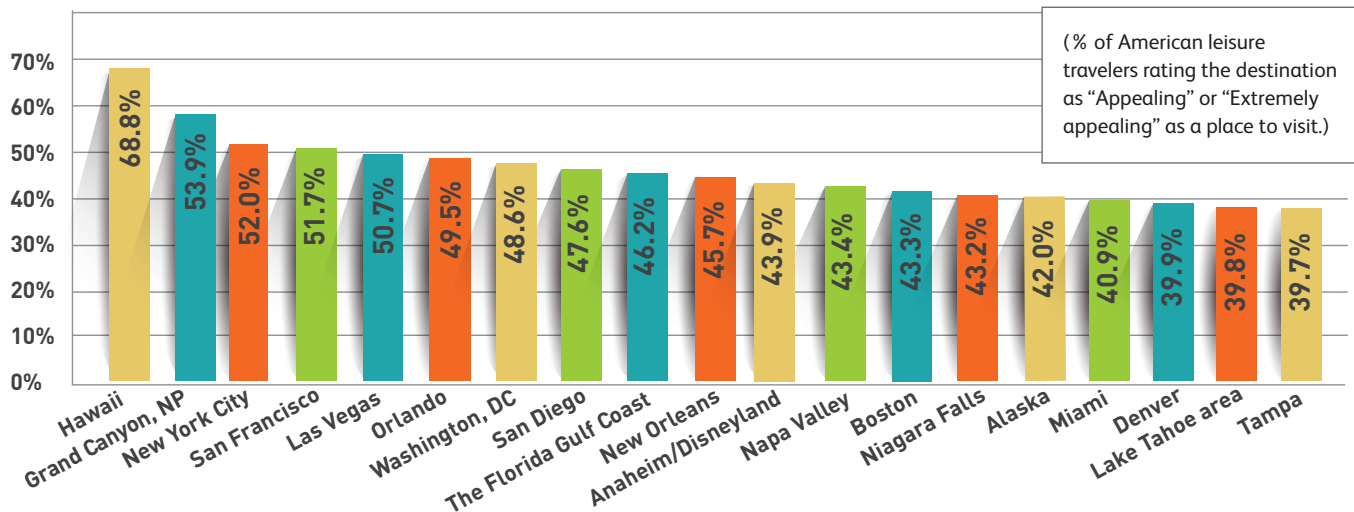
Destination Excitement Index™ Beaches Narrowly Top Cities

Our Destination Excitement Index™ measures Americans' collective enthusiasm for different destination types. In this edition of the survey, "Beach Destinations and Resorts" very narrowly edged "Cities and Metropolitan Areas" as the place type generating the most excitement this year. On a 100-point scale, beach destinations scored 71, indicating high levels of eagerness to visit. Urban destinations came in just below at 70. Cities and metropolitan areas, however, will be visited much more frequently than beach destinations. The average leisure traveler will visit 1.6 cities this year. 56.0% of American travelers will visit a beach destination in 2016



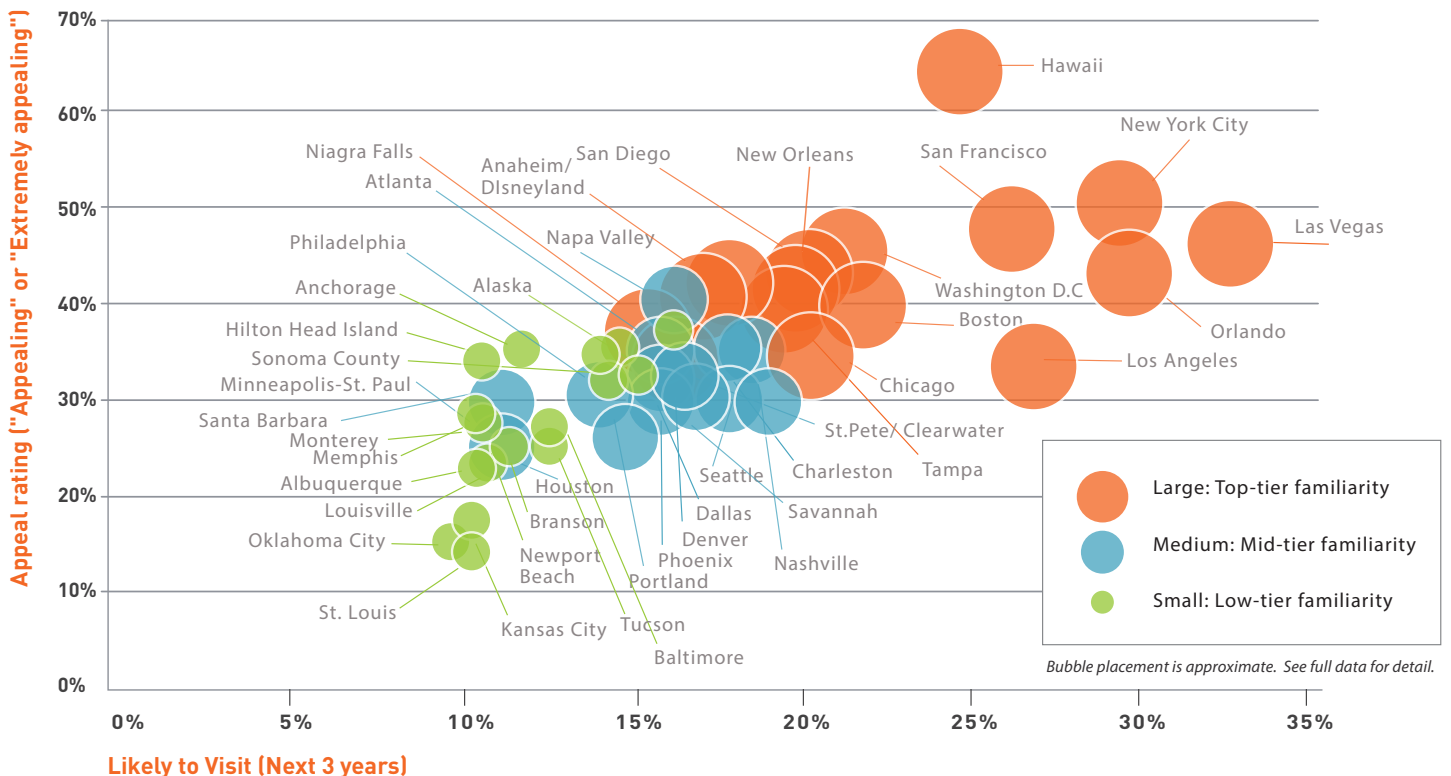
Most Appealing U.S. Destinations

Our survey measures destination appeal for 65 U.S. destinations. America's most appealing destinations are shown below, as measured by being rated either an "Appealing" or "Extremely appealing" leisure destination. Hawaii clearly outpaces the competition, scoring well above other first-tier destinations.



Appeal Vs. Likelihood of Visiting

Travelers rate destinations very differently for their appeal, familiarity and interest in visiting. The scatter diagram below shows many of the 65 destinations tested in our survey ranked by appeal and likelihood of visitation. Bubble size represents traveler familiarity with the destination as a leisure destination. While the correlation between a destination's appeal and traveler likelihood of visiting is obvious, comparing destinations in detail reveals the complexities of their brand positions. For complete detail visit: www.destinationanalysts.com/SATS/destinationappeal

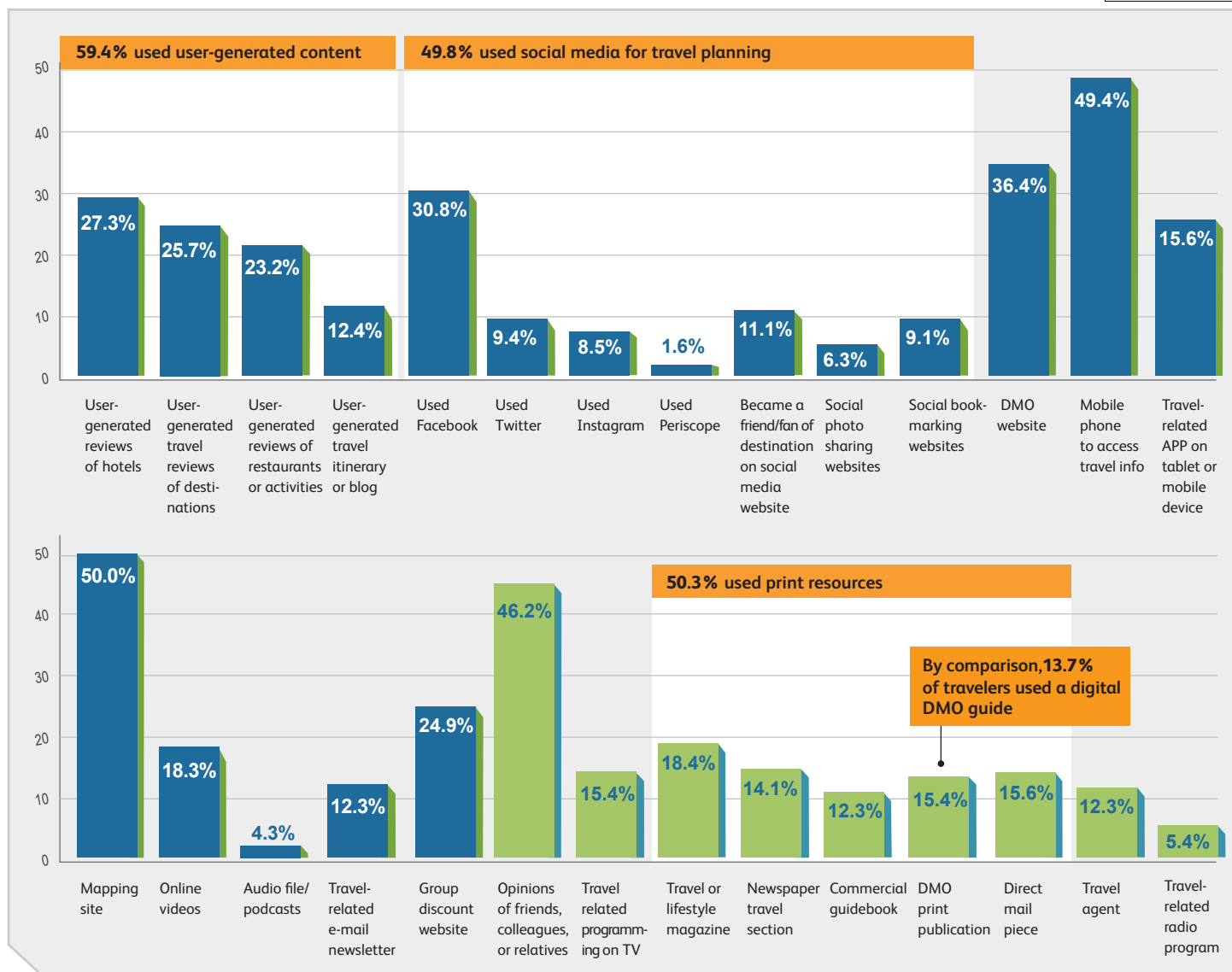


Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

Q In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)

● ONLINE
● OFFLINE



DMO Website Use in Travel Planning

Q

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 _____ 36.4%
NO _____ 58.5%
I Don't Know _____ 5.1%

Q

Q: At which point in your travel planning did you use the website of a destination's visitors or convention bureau (or chamber of commerce) or state or national government travel office? (Select all that apply)

Before I had decided to travel to the destination _____ 67.6%
After I decided to travel to the destination _____ 44.4%
While I was in the destination on my trip _____ 15.4%