



# THE STATE OF THE AMERICAN TRAVELER™

## Leisure Travel Outlook Back on Track

While there was some waning in traveler sentiment six months ago, Americans' expectations for their future travel and spending appear to be back on the rise. Nearly one third (31.6%) of domestic

leisure travelers expect to increase the number of leisure trips they will take in the coming year, up from 27.6 percent last July. Meanwhile, only 15.0 percent of American leisure travelers expect to cut back on their travel, compared with 18.9 percent this last July. Similar improvements were seen in expectations for spending on leisure travel. This January, 33.1 percent of leisure travelers said they expect to increase their travel spending in the coming year; just 25.6 percent felt the same last July.

### SNAPSHOT

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

**33%**

**Q** In the past twelve (12) months, how many trips have you take of more than 100 miles (round-trip) for purely leisure or personal reasons?

One.....	18.1%
Two.....	19.4%
Three.....	13.6%
Four.....	12.3%
Five.....	9.7%
Six.....	7.2%
Seven to Ten.....	11.1%
Eleven to Twenty.....	6.4%
Twenty One to Thirty.....	0.8%
More than Thirty.....	1.2%
<b>Average.....</b>	<b>5.0</b>

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

Zero.....	41.2%
One.....	19.9%
Two.....	13.4%
Three or more.....	25.5%
<b>Average:.....</b>	<b>2.3</b>

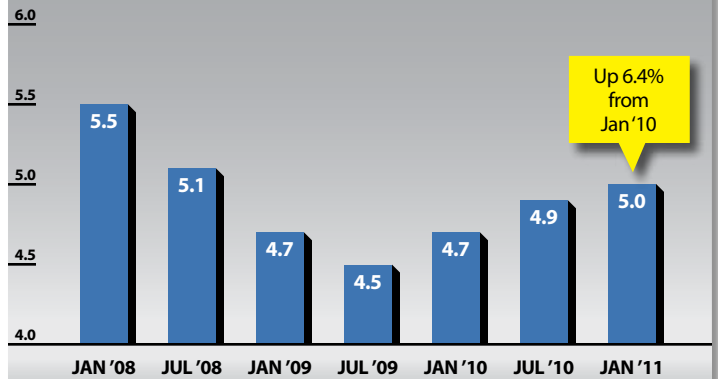
**Q** How many of these leisure trips were primarily by automobile?

Zero.....	11.8%
One.....	21.0%
Two.....	19.6%
Three.....	13.3%
Four.....	9.0%
Five or more.....	25.2%
<b>Average.....</b>	<b>3.3</b>

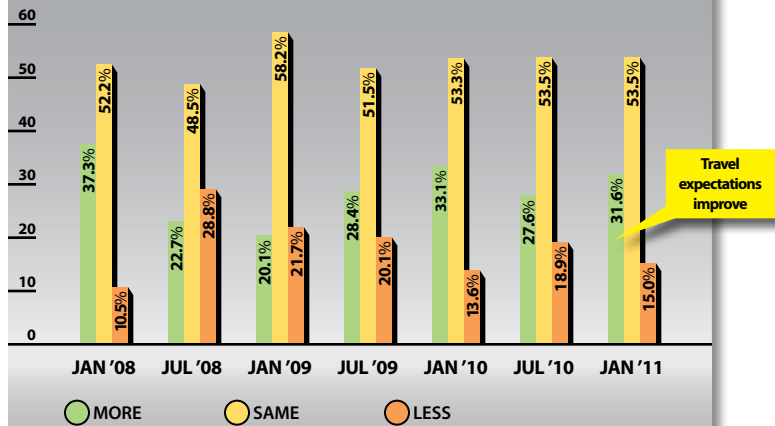
**Q** How many of these leisure trips included travel outside the United States?

Zero.....	79.0%
One.....	14.0%
Two.....	4.5%
Three or more.....	2.6%
<b>Mean.....</b>	<b>0.3</b>

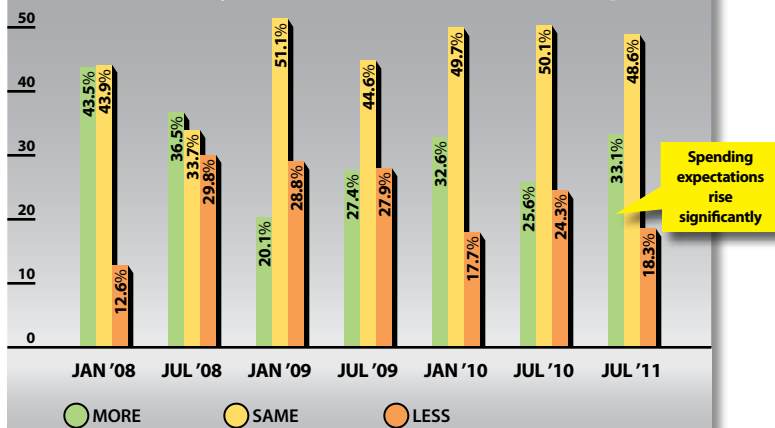
Average number of leisure trips taken (past 12 months)



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?

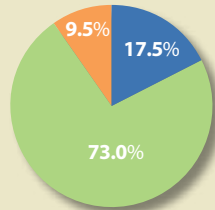


# Gulf States Get Reprieve

The negative effect on travelers' consideration of traveling within the Gulf States due to the BP/Deepwater Horizon oil spill has abated dramatically over the past six months. In early July 2010—as oil continued to leak—one third (33.0%) of American travelers felt the spill would affect the likelihood they would travel in the Gulf Coast region in the next year. In January, that figure has fallen by half, to 17.5 percent.

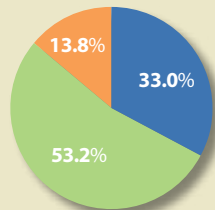
**Q** Do the after effects of the BP-Deepwater Horizon oil spill in any way affect the likelihood that you will visit or travel within the Gulf Coast States (Texas, Louisiana, Mississippi, Alabama or Florida) in the next twelve (12) months?

January 2011



■ Yes ..... 17.5%  
 ■ No ..... 73.0%  
 ■ I don't know ..... 9.5%

July 2010



■ Yes ..... 33.0%  
 ■ No ..... 53.2%  
 ■ I don't know ..... 13.8%

**47%**

Percent fewer travelers who say that the oil spill will affect the likelihood they will travel within the Gulf Coast states

## Reasons for cutting back on leisure travel



	Gasoline was too expensive	Personal financial reasons	Airfare was too expensive	Safety concerns
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%
January 2011	39.3%	54.6%	34.9%	11.0%

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 ..... 54.6%
- Gasoline was too expensive ..... 39.3%
- Airfare was too expensive ..... 34.9%
- I was too busy at work ..... 24.1%
- I didn't have enough vacation time ... 20.5%
- Safety concerns ..... 11.0%
- Other personal responsibilities ..... 10.6%
- Child care responsibilities ..... 8.8%
- Health/Illness ..... 8.1%
- I did not have a travel companion(s) ... 6.0%
- I travel frequently for business and preferred to stay home ..... 2.0%
- Lack of availability (at hotels, golf courses, spas, etc.) ..... 1.9%

**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 ..... 59.6%
- Visit generally less expensive destinations ..... 27.0%
- Reduce the number of leisure trips I will take ..... 22.3%
- Reduce the number of total days I will spend on leisure trip(s) to save money ..... 19.1%
- Take at least one "staycation" (a vacation spent at home) rather than traveling ..... 17.5%
- Shorten the distance of my trip(s) or reduce side trips along the way to save money ..... 17.2%
- Select less expensive mode(s) of transportation ..... 13.8%
- Cancel a trip that I've already begun to plan ..... 3.0%



Despite demonstrating more optimism about their travel intentions, travelers still love a deal. Nearly 60 percent said they plan to look for travel discounts or bargains.

**Fun Fact** The iPad Makes its Debut: Apple's iPad came to market in April 2010. By our January 2011 survey, 7.1 percent of travelers report having used an iPad or other tablet PC to access travel information online while traveling.

### Leisure Travel Planning Resources



	User-Generated Content (any)	Social Media (any)	Print (any)
January 2011	43.5%	25.8%	39.7%

**Fun Fact** 75 percent of American travelers have used Facebook (for any reason) in the past 12 months.

# DESTINATION HOT LIST



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

Las Vegas .....	33.1%	Boston .....	7.7%
New York City .....	27.7%	San Diego .....	7.6%
Orlando/Disney World .....	20.5%	Anaheim/Disneyland .....	6.9%
Chicago .....	13.5%	New Orleans .....	5.6%
Washington DC .....	13.1%	Dallas .....	5.6%
San Francisco .....	11.2%	Seattle .....	5.5%
Los Angeles .....	11.2%	Atlanta .....	4.5%
Miami .....	8.0%	Myrtle Beach .....	3.7%

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

United Kingdom .....	16.1%	Spain .....	5.8%
Canada .....	15.3%	Bahamas .....	4.2%
Italy .....	14.0%	Greece .....	4.1%
France .....	13.7%	China - Hong Kong .....	4.1%
Mexico .....	13.7%	Japan .....	3.6%
Australia .....	8.5%	Brazil .....	2.6%
Germany .....	7.4%	Jamaica .....	2.4%
Ireland .....	6.4%	New Zealand .....	2.4%



## What We Do on Our Leisure Trips

Dine in restaurants .....	74.4%	Attend a family reunion .....	21.4%	Bird watching .....	7.4%
Shopping .....	67.6%	Fishing .....	21.4%	Canoeing or kayaking .....	7.0%
Visit friends or relatives .....	65.4%	Camping .....	20.8%	Horseback riding .....	6.8%
Go to a beach or lake .....	53.6%	Nightclubbing .....	19.4%	ATV or off road vehicles .....	6.5%
Sightseeing in cities .....	45.9%	Take a guided tour .....	17.2%	Astronomy or stargazing .....	6.4%
Visit an historical place or attraction .....	41.1%	Foliage or fall scenery watching ...	17.0%	Hunting .....	6.1%
Visit small towns/villages .....	40.4%	Visit a winery .....	16.8%	Tennis .....	5.7%
Casinos/Gambling .....	36.0%	Visit a National Forest .....	16.3%	Skiing or snowboarding .....	5.7%
Sightseeing in rural areas .....	34.6%	Visit ethnic heritage sites .....	13.5%	Hiking trip (1 or more nights on trail) .....	5.4%
Visit a theme/amusement park .....	30.1%	Spa or hot spring .....	12.4%	White water rafting .....	5.2%
Visit a state or local park .....	29.5%	Stay in an all-inclusive resort .....	11.6%	Mountain biking .....	5.0%
Art galleries or museum .....	27.5%	Sailing or other water sports .....	11.2%	Visit a Revolutionary War battlefield or historic monument/location .....	4.3%
Visit National Parks .....	26.7%	Golf .....	10.5%	Rock climbing .....	3.7%
Attend concert, play or musical .....	25.5%	Visit environmental/ ecological sites .....	9.9%	Mountaineering .....	2.9%
Day hiking .....	24.4%	Visit a Civil War battlefield or historic monument/location .....	9.4%	Ranch vacation .....	2.4%
Attend a sporting event .....	23.8%	Take a day cruise .....	8.6%		
Drive a designated scenic byway .....	22.7%				

## 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)

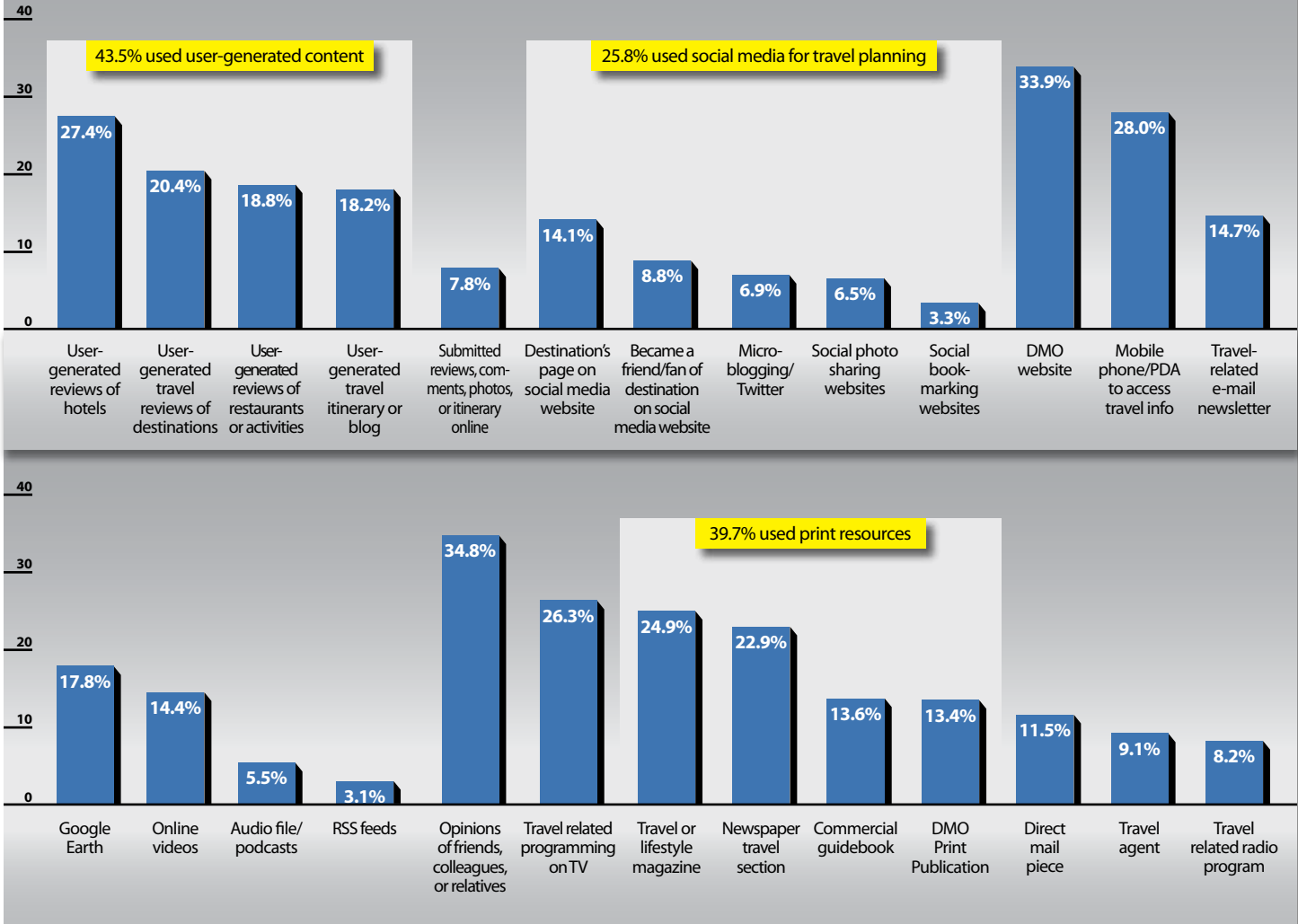


Spent more money more than I expected to .....	53.5%
Took a laptop computer with me when I traveled for leisure .....	37.0%
Made a new friend(s) .....	28.0%
Used a mobile phone, PDA or handheld device to access online travel information .....	28.0%
Did something totally new and exciting .....	27.3%
Traveled specifically to get away from my work .....	21.0%
Ordered room service in a hotel .....	18.4%
Attended religious services .....	16.1%
Brought my own meal on an airline .....	12.4%
Brought my pet(s) with me .....	11.9%
Did something risky or dangerous .....	11.6%
Traveled specifically to spend time away from someone .....	10.7%
Took my work with me on vacation .....	10.4%
Purchased a travel package .....	9.7%
Extended my vacation because I was having so much fun .....	9.1%
Used the mini bar in a hotel .....	8.4%
Used an iPad or other tablet computer to access online travel information .....	7.1%
Took a class or educational seminar .....	6.3%
Went to an adult cabaret, theater or strip club .....	5.6%
Traveled in an organized group tour .....	5.0%
Met a new romantic partner .....	4.7%
Traveled to meet (for the first time) someone I was introduced to online .....	4.3%
Came home early because I was bored .....	3.5%

# TRAVEL & TECHNOLOGY

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

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)



### 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) 74.9%**

**BEFORE I left home for a trip(s) 56.9%**

### 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

Check weather	62.5%
Look at maps	59.7%
Find restaurant information	58.3%
Use a GPS-related app for directions	44.2%
Find hotel information	43.1%
Find sightseeing or attractions information	39.9%
Find shopping information	38.9%
Check into a flight	32.2%
Check into a hotel	19.4%
Research public transportation	17.0%
Use a destination-specific app for travel information	12.4%
Get a mobile boarding pass	7.1%
Buy tickets (to an event, festival, museum, etc.)	6.0%
Check out of a hotel	5.7%

**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 January 3rd through 6th, 2011, 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%.