

THE State of the American Traveler



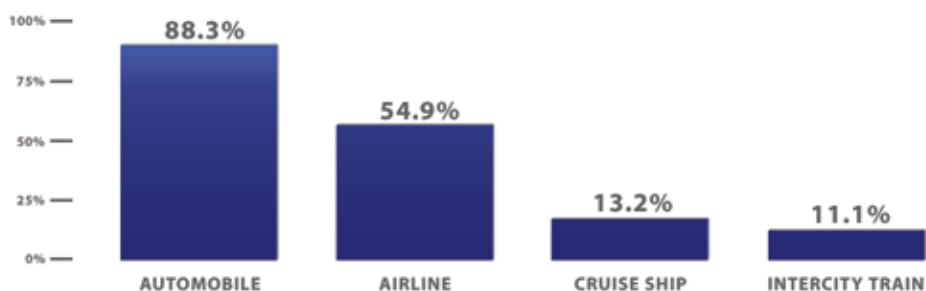
Americans expect to take more trips and increase their spending on leisure travel in the upcoming year. Meanwhile, spiraling gas prices have dampened recent travel demand, and safety issues loom large in America's quest for a relaxing escape. The findings of this recent national survey illustrate the mindset and behaviors of the American leisure traveler.

Americans are in the mood to travel. In the past year, the average leisure traveler took a trip nearly every other month, averaging 5.5 leisure trips a year. These travelers expect to maintain or increase the number of trips they take in the next 12 months. One-third (33%) say that they plan to travel more in the upcoming year than they did in the most recent 12 month period. Over 44 percent also plan to spend more on leisure travel in the coming year. This bodes very well for an industry coping with the effects of soaring gasoline prices and persistent safety concerns.

Not all findings of this survey inspire optimism, however. Recent spikes in gasoline prices have indeed impacted travel. Almost half of all leisure travelers and 55.3 percent of women—the gender often viewed as the travel decision maker—say they would have taken more leisure trips in the past year had gas not been so expensive.

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1. What methods have you used to travel for leisure in the past 12 months?



2. 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: 9.0%
Two: 23.7%
Three: 12.5%
Four to five: 23.7%
Six to ten: 21.1%
Eleven to twenty: 7.5%
More than twenty: 2.6%
Average: 5.5 trips

3. How many of these trips were day trips with no overnight stay? □

Zero: 45.8%
One: 16.3%
Two: 13.0%
Three or more: 24.9%
Average: 2.0 trips

4. How many of these trips included travel outside the United States? □

Zero: 73.3%
One: 17.1%
Two: 4.8%
Three or more: 4.8%
Average: 0.6 trips

5. In the past twelve (12) months, how many trips have you taken of more than 100 miles (round-trip) for business reasons or to attend a convention/group meeting? □

Zero: 57.8%
One: 11.6%
Two: 9.7%
Three or more: 21.0%
Average: 2.3 trips

6. 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?

Travel more: 33.0%
About the same: 55.6%
Travel less: 11.5%

7. 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? (Select one)

Spend more: 44.1%
About the same: 44.9%
Spend less: 11.0%

8. In the past 12 months, which (if any) of the following kept you from traveling more for leisure than you would have otherwise preferred? ☐

Gasoline was too expensive: 47.3%
Personal financial reasons: 42.0%
Airfare was too expensive: 28.6%
I was too busy at work: 26.4%
Other personal responsibilities: 23.8%
Too little vacation time: 18.4%
Safety concerns: 10.1%
Child care responsibilities: 9.3%
Travels frequently for business and prefers to stay home: 2.0%

9. In the past 12 months, have any of the following caused you to change (in any way) an existing leisure travel plan? ☐

Gasoline was too expensive: 37.6%
Personal financial reasons: 23.9%
Airfare was too expensive: 17.2%
I was too busy at work: 13.6%
Other personal responsibilities: 12.7%
I didn't have enough vacation time: 8.9%
Safety concerns: 6.6%
Child care responsibilities: 5.3%
Travels frequently for business and prefers to stay home: 1.1%

10. At most, how many miles (one-way) would you typically be willing to travel for a weekend get-away trip? ☐

Under 100 miles: 7.5%
100 TO 250 miles: 53.6%
251 TO 500 miles: 23.8%
500 TO 1000 miles: 5.2%
Over 1000 miles: 3.7%
Average: 328 miles

11. In the past 12 months, did you take any leisure trips (of 50 miles or more one-way) where shopping was an important reasons for making the trip? ☐

Yes: 29.7%
No: 70.3%

12. In the past 12 months, how many such shopping-oriented trips did you take? ☐

One: 33.9%
Two: 29.4%
Three or more: 32.6%
Average: 3.3 trips

Reasons for cutting back on leisure travel, by gender

	Gasoline is too expensive	Personal financial reasons	Too busy at work	Safety Concerns
Female	55.3%	49.3%	23.7%	9.6%
Male	39.4%	34.7%	29.1%	10.5%

Question 8: Based on 519 female and 525 male respondents.

13. When traveling for leisure, where do you usually prefer to shop? ☐

Outlet malls: 51.4%
Local or neighborhood shopping areas: 49.3%
Festival or special event vendors: 34.2%
Conventional shopping malls: 27.4%
Department stores: 25.9%
Street vendors: 21.6%
Duty-free/tax-free shops: 18.4%
Strip malls: 16.6%
Stores in hotels: 8.1%
Stores in airports: 5.0%

14. In the past 12 months, did you take any leisure trips (of 50 miles or more one-way) specifically to do any of the following? ☐

Dine in a specific restaurant: 26.9%
Visit a destination because it has good restaurants: 16.6%
Attend a food-related event or festival: 16.2%
Visit a destination because of an interest in the region's cuisine: 12.7%
Visit a specific wine country region: 7.1%
Attend a wine-related event or festival: 6.7%
Visit a specific winery: 5.6%

15. Which of the following statements accurately describe you? ☐

I think a city with good restaurants is a more attractive vacation destination than one without such restaurants: 44.1%
When traveling, I am interested in regional cuisines: 38.3%
I am a "foodie": 31.9%
I would travel more than 50 miles (one-way) to go to a specific restaurant: 30.8%
I would travel and stay overnight away from home to go to a specific restaurant: 12.1%
I would travel more than 100 miles (one-way) to go to a specific restaurant: 9.5%
I would travel more than 200 miles (one-way) to go to a specific restaurant: 5.0%

Fun with Data

Some interesting facts we gleaned from the cross tabulations...

Younger travelers are much more likely to travel specifically to shop than are their older counterparts. In fact, respondents under 35 years old were more than 30% more likely to have taken a shopping oriented trip (in the past year) than were those over 55 years old.

While 18.2% of respondents attended a church or religious services at least once while traveling (in the past year), this group was also more than twice as likely than other leisure travelers to have gone to an adult cabaret or strip club while vacationing.

In the past year, only 2.4% of all respondents traveled specifically to meet someone for the first time, that they had met online. Women were about twice as likely as men to have made such a trip (1.5% vs 3.3%).

While not a wide-spread practice, men (6.1%) were about twice as likely as women (3.3%) to have met a "new romantic partner" while traveling for leisure in the past year.

Of the top 5 destinations in our "Destination Hot List," San Francisco is the only destination that frequent travelers (6+ leisure trips per year) say they want to visit more than do respondents who travel less frequently.

DESTINATION HOT LIST

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

Las Vegas	34.0%
New York City	23.8%
Orlando/ Disney World	19.8%
San Francisco	12.6%
Washington DC	11.9%
Hawaii	10.4%
Los Angeles	9.8%
Chicago	9.5%
Boston	8.4%
San Diego	8.4%
Seattle	8.0%
Grand Canyon Natl. Park	7.5%
Miami	5.9%
Yellowstone Natl. Park	5.2%
Atlanta	4.5%
Denver	4.4%
Myrtle Beach	4.4%
New Orleans	4.4%
Disneyland	4.3%
Phoenix	4.1%
Branson	3.9%
Dallas	3.7%

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

United Kingdom	19.2%
Italy	17.1%
Canada	15.9%
France	14.5%
Mexico	13.5%
Germany	9.8%
Australia	9.6%
Ireland	8.6%
Spain	6.5%
Japan	4.3%
Greece	4.1%
Bahamas	3.7%
China - Hong Kong	3.2%
Switzerland	2.9%
New Zealand	2.7%
Jamaica	2.7%
Brazil	2.6%
Austria	2.2%
Thailand	1.6%
Israel	1.5%
Russia	1.4%

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

16. 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:	69.4%
Visit friends or relatives:	62.9%
Shopping:	56.7%
Sightseeing in cities:	51.3%
Historical attraction:	46.7%
Sightseeing in rural areas:	39.0%
Casinos/Gambling:	34.1%
Theme/amusement park:	28.5%
Art galleries or museum:	25.7%
Concert, play or musical:	24.2%
Guided tour:	22.3%
Family reunion:	21.8%
Attend sporting event:	20.5%
Visit ethnic heritage sites:	15.8%
Nightclubbing:	15.5%
Visited a winery:	14.9%
Stay in an all-inclusive resort:	12.5%
Sailing / water sports:	11.3%
Take a day cruise:	10.3%
Golf:	9.1%
Skiing / snowboarding:	4.8%
Tennis:	3.6%

17. 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)?

Go to a beach or lake:	47.2%
Visit small towns/villages:	41.4%
Visit a state or local park:	29.3%
Visit National Parks:	26.0%
Day hiking:	18.7%
Fishing:	18.2%
Camping:	18.1%
Visit a National Forest:	17.2%
Visit environmental/ecological sites:	11.3%
Bird watching:	7.2%
Horseback riding:	5.4%
Mountain biking:	4.7%
ATV or off road vehicles:	4.5%
Canoeing or kayaking:	4.4%
Hiking trip (1 or more nights on trail):	4.2%
Hunting:	3.9%
White water rafting:	3.6%
Ranch vacation:	2.3%
Rock climbing:	2.1%
Mountaineering:	2.0%

What is generally important to you in choosing the destinations you visit on leisure trips? Evaluate the destination attributes below using the 4 point scale where "1" equals "Not at all important" and "4" equals "Very important" (% reporting "important" or "Very important")

Safety	88.8%	Exciting	76.6%
Scenic beauty	86.3%	Interesting culture	68.8%
Good weather	86.2%	Historical attributes	62.2%
Lots to see and do	85.4%	Good beaches	58.3%
Food and dining	80.0%	Museums	47.6%
Easy to get there	79.2%	Nightlife	47.6%
Good hotels	78.8%	Shopping	44.2%
Quiet and relaxing	76.6%	Good for kids	38.3%

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

Spent more money more than you expected to:	57.0%
Did something totally new and exciting:	29.5%
Made a new friend(s):	29.0%
Traveled specifically to get away from my work:	23.5%
Ordered room service in a hotel:	21.0%
Attended religious services:	18.2%
Traveled specifically to spend time away from someone:	12.5%
Brought my pet(s) with me:	11.7%
Brought your own meal on an airline:	11.3%
Done something risky or dangerous:	10.8%
Extended my vacation because I was having so much fun:	10.2%
Used the mini bar in a hotel:	9.4%
Took my work with me on vacation:	9.0%
Took a class or educational seminar:	7.0%
Met a new romantic partner:	4.7%
Went to an adult cabaret, theater or strip club:	4.1%
Came home early because I was bored:	2.9%
Traveled to meet (for the first time) someone I was introduced to online:	2.4%

(Continued from Page 1)

While the automobile remains the most common mode of travel, an airline was used at least once by over half (54.9%) of those who traveled for leisure in the past year. More than one-in-four travelers say the high price of airfare has caused them to travel less. Many of those traveling by air also encountered problems, with one-in-five saying that those problems would make them less likely to travel by air in the future. And safety was revealed as the number one attribute Americans consider when choosing their travel destination.

Nevertheless, Americans are making their trips meaningful with activities like dining out (69.4%), visiting with friends and/or family (62.9%), shopping (56.7%), doing something "totally new and exciting" (29.5%), and making new friends (29.0%). The nation's love affair with the great outdoors remains strong. In the past year, almost one third of leisure travelers (29%) visited a State or local park. National Parks were enjoyed by one-in-four vacationers (26%) and our National Forest nearly one-in-five (17.2%). Fishing and camping remain popular travel activities as well.

The destinations America plans to visit are as diverse as our nation. In an open-ended question asking where travelers most want to visit in the upcoming year, over 600 unique destinations were mentioned by 1,043 respondents. Las Vegas outpaced all the competition, with New York and Orlando filling out the top of the list.

19. In the past 12 months, in which of the following have you stayed while on a leisure trip (or trips)?

Mid-priced/Extended-stay hotel: 42.3%
Full-service hotel: 35.8%
Economy hotel: 35.1%
Budget hotel or motel: 23.9%
Time share property: 15.4%
Bed & Breakfast inn: 11.2%
Luxury hotel: 10.3%
Public campground (tent camping): 8.0%
Cruise ship: 7.9%
Recreational vehicle, motor home or camper: 6.7%
Private campground (tent camping): 5.5%
Private campground (cabin or yurt): 4.3%
Public campground (cabin or yurt): 2.4%

20. When using the Internet to select a hotel, what are the most important website attributes? Please select the five (5) items below that you generally consider to be most important.

Good room rates (price): 68.1%
Option to book online: 45.2%
Pictures of hotel room: 44.3%
Ability to compare hotels: 44.3%
Hotel amenities explained: 38.9%
Maps/hotel location available: 33.5%
Lowest room rate guarantees: 32.8%
Reviews from other travelers: 28.2%
Ease of online booking process: 27.7%
Pictures of other parts of the hotel: 24.6%
Loyalty or rewards programs: 18.6%
Online virtual tours: 16.6%
Ability to book directly from the hotel: 13.9%
Option to book by phone: 13.7%
Expert/professional reviews: 12.1%
I don't use the Internet to select hotels: 10.7%
Online streaming/other video of hotel: 5.0%

21. In the past 12 months, have you traveled for any reason by air?

Yes: 57.0%
No: 43.0%

Affluence and leisure travel

	Annual Household Income under \$45,000	Annual Household Income \$45,000 to \$79,999	Annual Household Income \$80,000 and up
Relaxation is important to why they travel for leisure	35.2%	39.3%	43.3%
Average number of leisure trips taken in past 12 months	4.3	5.4	6.5
Traveled specifically to get away from work in the past 12 months	15.3%	23.4%	32.2%
Took work with them on vacation in the past 12 months	4.4%	7.8%	15.2%

22. In the past 12 months, which (if any) of these air travel related problems have you encountered?

Excessive security line wait: 30.6%
Excessively delayed flight(s): 28.9%
Inappropriate use of overhead bins by passengers: 23.4%
Check-in difficulties: 14.3%
Rude or unprofessional airport staff: 11.4%
Rude/unprofessional TSA Staff: 11.1%
Rude/unprofessional airline staff: 10.1%
Lost baggage: 6.9%
Difficulty getting to the airport: 5.9%
Safety concerns in the air: 4.5%

23. How likely are the problems mentioned above to make you less likely to travel by air in the future?

Very Likely: 5.8%
Likely: 13.6%
Not Likely or Unlikely: 31.8%
Unlikely: 18.2%
Very Unlikely: 29.7%
I don't know: 0.9%

24. How likely are the problems above to make you consider choosing an alternative airline?

Very Likely: 9.8%
Likely: 22.4%
Not Likely or Unlikely: 34.8%
Unlikely: 14.7%
Very Unlikely: 17.5%
I don't know: 0.7%

25. In the past year, has the overall convenience of domestic air travel...

Improved a lot: 3.5%
Improved: 18.7%
Stayed the same: 45.1%
Gotten worse: 22.2%
Gotten much worse: 6.2%
I don't know: 4.2%

26. Please think about why you usually travel for leisure. From the list below, select the three (3) most important reasons why you travel for leisure.

Relaxation: 39.5%
Spend time with family: 37.4%
Escape day-to-day routine: 33.4%
Spend time with my spouse or partner: 31.8%
Visit unfamiliar place(s) of interest: 26.1%
Excitement or adventure: 18.8%
Spend time with friends: 17.8%
Experience other cultures: 13.5%
To enjoy food or dining: 13.5%
Visit familiar place(s) that I like: 10.7%
Attend special events or festivals: 8.5%
It's good for my children: 8.4%
Go shopping: 6.7%
Participate in outdoor activities: 6.7%
Personal growth/development: 6.0%
Romance: 5.3%
Attend theater, opera or the arts: 1.8%
Visit wineries: 1.6%

Methodology

The State of the American Traveler Survey was conducted by Destination Analysts, Inc., a San Francisco-based tourism industry research company.

The survey was conducted online among a nationally representative sample of adult Americans. From July 25th to August 2nd, surveys were collected from this 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, 1,043 leisure travelers completed the survey. With this sample size, the topline data presented here can be considered to have a reliability of +/- 3.0 percent.