

Destination Analysts'

The State of the American Traveler™

DESTINATION MANAGEMENT EDITION

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Destination  Analysts

The political and consumer landscape faced by destination marketers is rapidly evolving, and consequently, the DMO industry has been reimagining its core business model. Thanks to the vision and hard work of thought-leaders across the industry, DMOs are reinventing themselves as destination management organizations. These organizations, in addition to fulfilling their traditional sales and marketing roles, are now addressing many broader concerns of their stakeholders, including building comprehensive destination strategic plans, addressing seasonal and spatial over-tourism issues, advocacy for social issues such as environmental degradation and homelessness, and infrastructure development.

This is only a partial list of the ways DMOs are reinventing themselves, and to help these organizations in this transition this edition of The State of the American Traveler explores the opinions of leisure travelers related three issues. Our hope is that this market intelligence can help the industry shape its thinking in these transitional times. Please enjoy. As always, if you have questions or ideas for future survey topics, we welcome you to message us:

info@destinationanalysts.com
or @DA_Research.

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







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Methodology

THE STATE OF THE AMERICAN TRAVELER SURVEY is conducted quarterly 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 October 1st to the 6th, 2019, 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, 2,000 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.3%. 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, inaccuracies or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.

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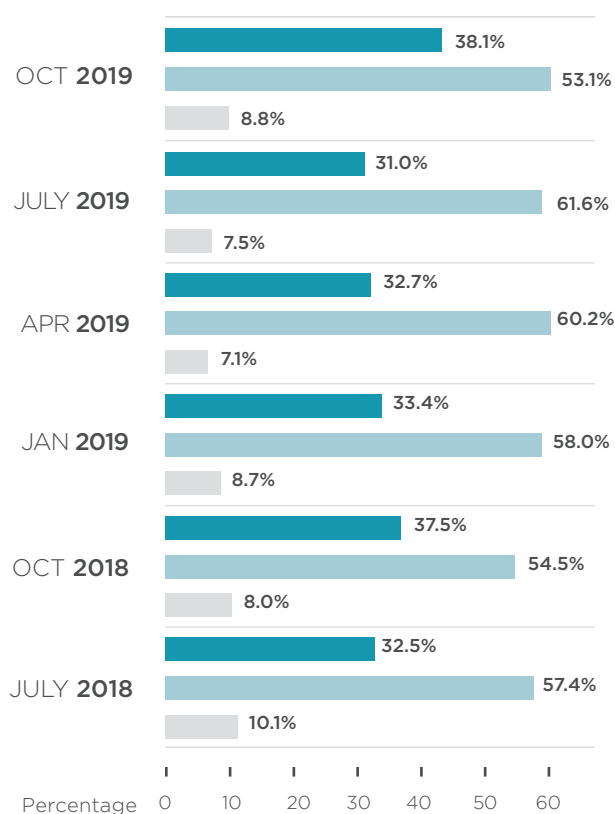
Travel Expectations and Travel Spending Expectations

AMERICAN LEISURE TRAVEL OPTIMISM appears to be relatively stable as we move into the winter season.

In our Fall 2019 wave, over a third of American travelers (38.1%) say they will take more leisure trips in the upcoming year, approximately at the same level as this point last year, when 37.5% of Americans reported that they would be increasing the number of trips taken. This is slightly up from last year as should be considered a positive sign, as throughout the past year, these figures have been relatively weak. In the current survey wave, however, 35.9% of travelers said they expected to increase their travel spending in the upcoming year, down slightly from 36.9% last fall

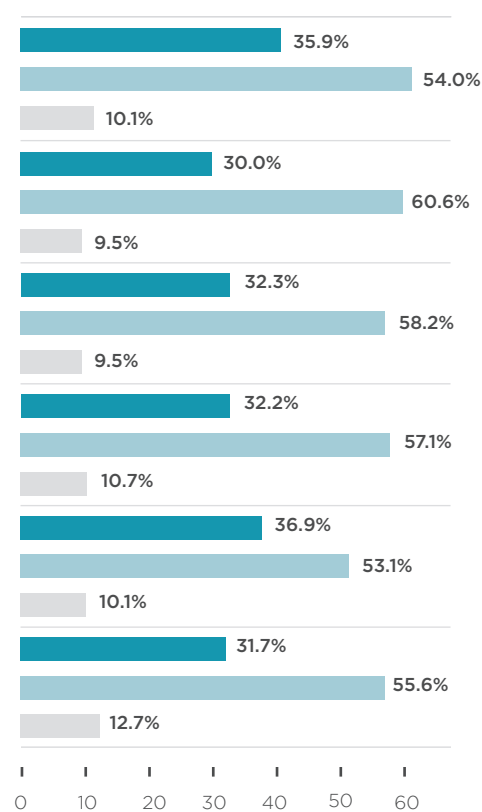
THE KEY: ■ expect more ■ expect the same ■ expect less

Travel Expectations (Trips)



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?

Travel Expectations (Spending)

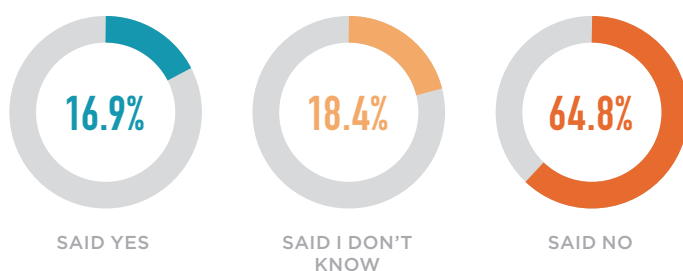


Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

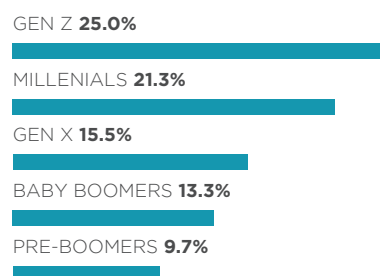
The Environmental Impact of Leisure Travel

When people think of harmful environmental impact their minds usually turn to major disasters or corporations degrading our planet's limited natural resources. However, there is a small but growing sentiment that travel is also impacting our planet. In the age of globalization, more people are traveling now than ever before and some travelers, particularly younger generations, are taking note about the adverse effects.

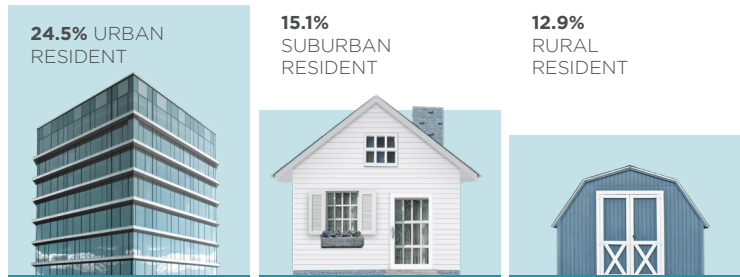
Q: Do you believe that people traveling for leisure have an overall negative impact on the environment?



Percent Who Said Yes, By Generation

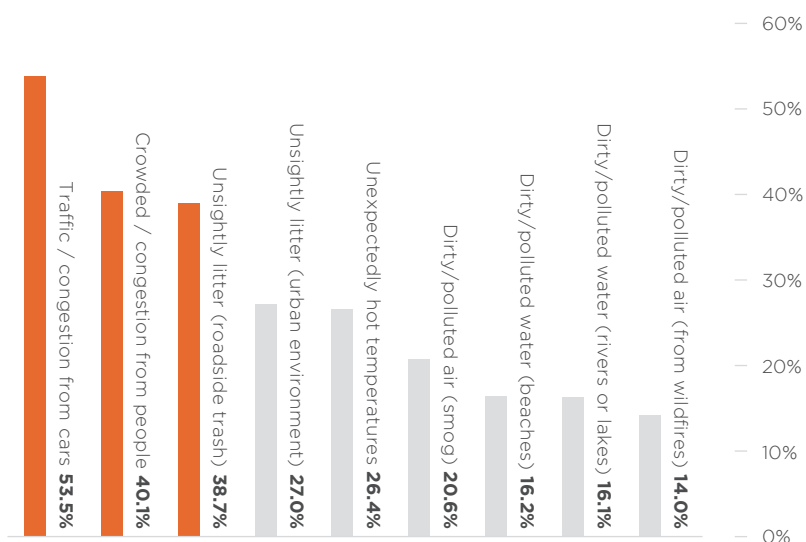


Younger travelers are far more likely than their older counter-parts to consider travel an environmental concern. Similarly, residents of urban areas surpass rural residents on this metric.



Although most Americans report experiencing environmental issues while traveling, far fewer feel that travel has an overall detrimental impact on the environment. Many travelers say they have experienced road congestion, crowding and urban litter, yet only 16.9% say they think leisure travel impacts the environment negatively.

Q: In the PAST TWELVE (12) MONTHS while traveling for leisure in the United States, have you experienced any of the following environmental issues?

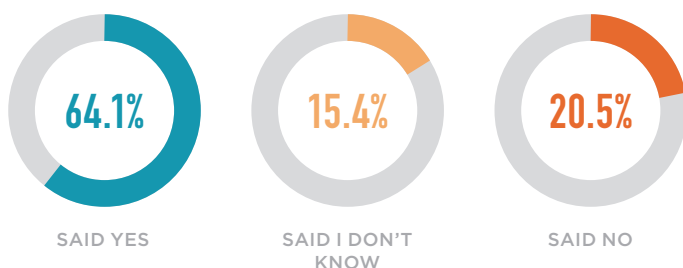


Climate Change and its Effect on Travel

A majority of Americans believe that human activity is responsible for climate change. However, fewer feel that climate change has had a significant impact on their leisure travel in recent years. This appears to be changing. While 46.6% said climate change has had no impact on their leisure travel in the past 5 years, only 33.1% feel the same about their future travel in the next 5 years.

The impact of climate change on leisure travel is a growing concern. More Americans said this issue will have at least some impact on their leisure travel in the years to come.

Q: Do you believe that human activity is responsible for climate change?



By Generation

GEN Z **73.5%**

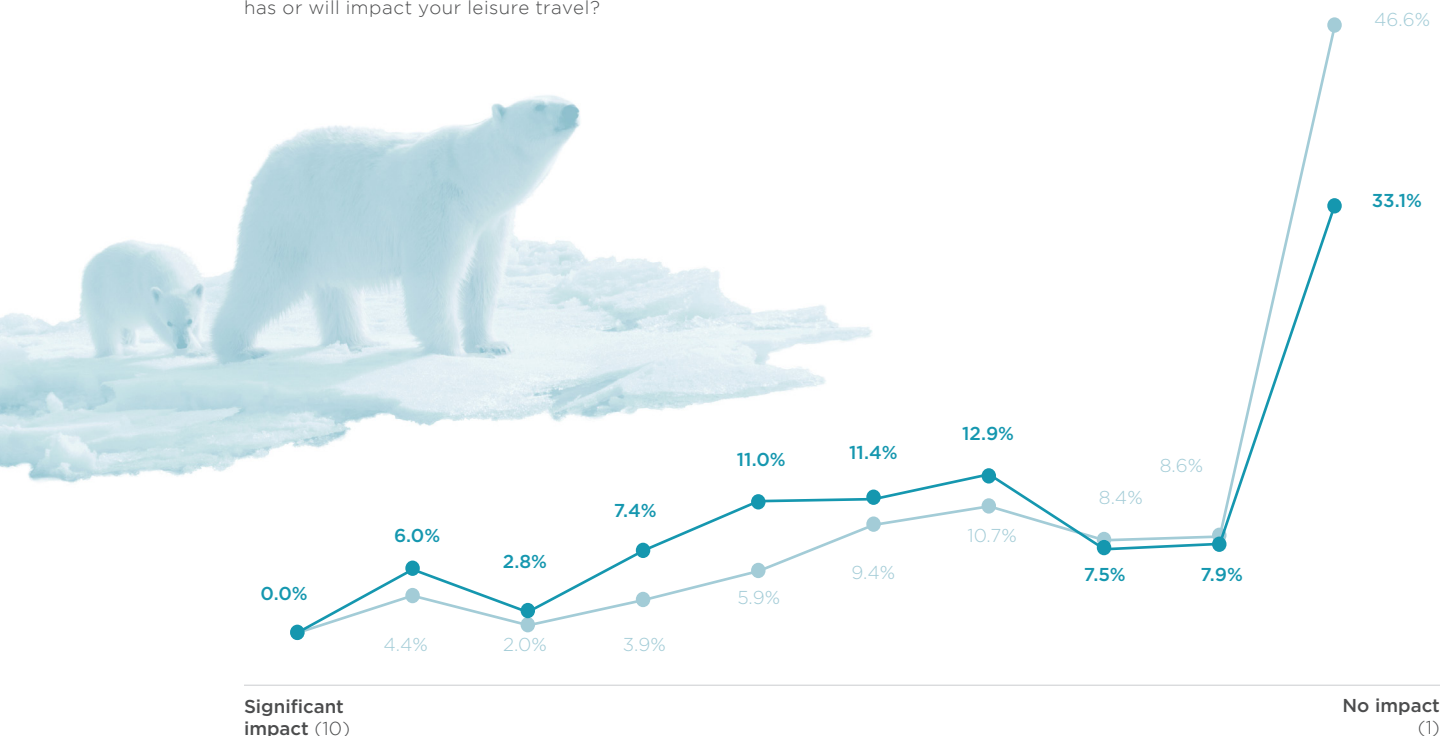
MILLENNIALS **72.9%**

GEN X **65.1%**

BABY BOOMERS **53.3%**

PRE-BOOMERS **58.3%**

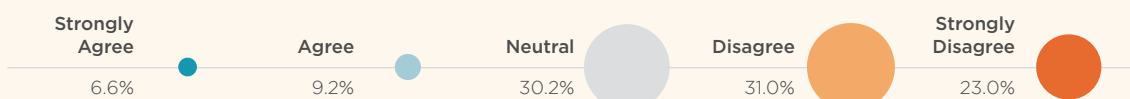
Q: In the PAST FIVE (5) YEARS and the NEXT FIVE (5) YEARS, please rate on a scale of 1 to 10, how much you think climate change has or will impact your leisure travel?



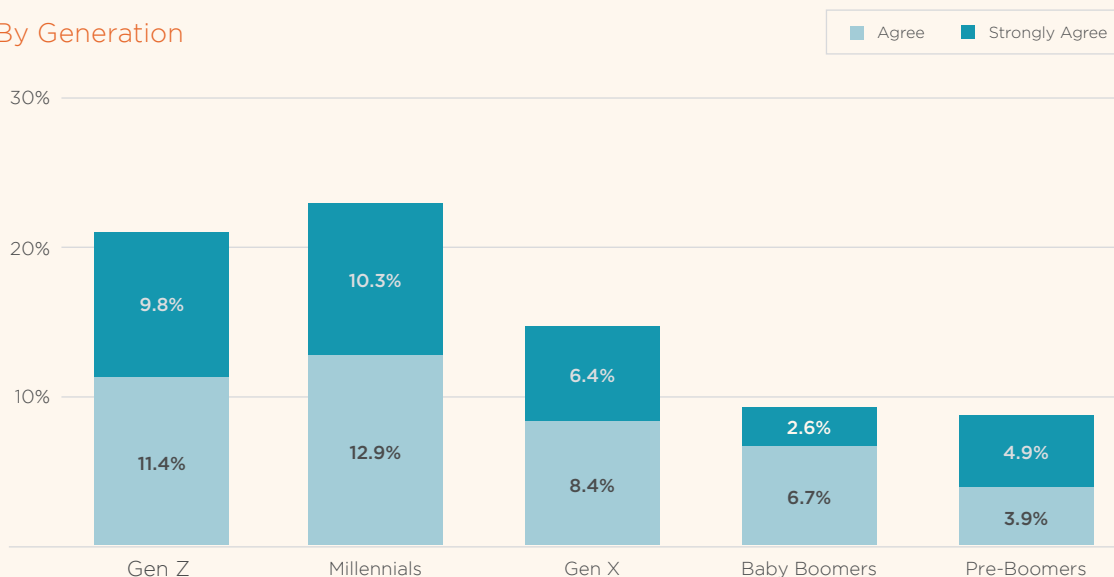
Climate Change and its Effect on Travel Continued

Will all this add up to a culture of travel shaming? As of now, only few feel that people should limit the distances they travel to preserve the environment. However, this sentiment is much stronger amongst younger generations.

I believe that people generally **should not travel long distances** via air as it is bad for the environment.



By Generation



Combating Travel's Environmental Impact

Carbon offsets aim to help airlines cancel out the environmental impact of the industry's rising emissions. But few Americans have purchased carbon offsets before. This may change as the sentiment around travel having a negative environmental impact becomes more ubiquitous.

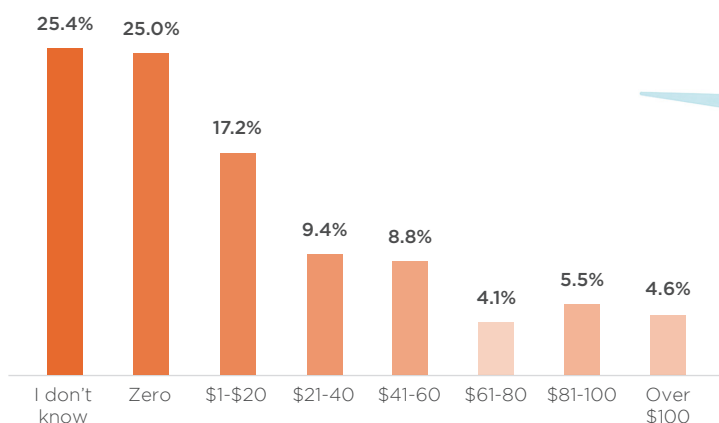
Q: Before taking this survey, had you ever heard of "carbon offsets" for travel?



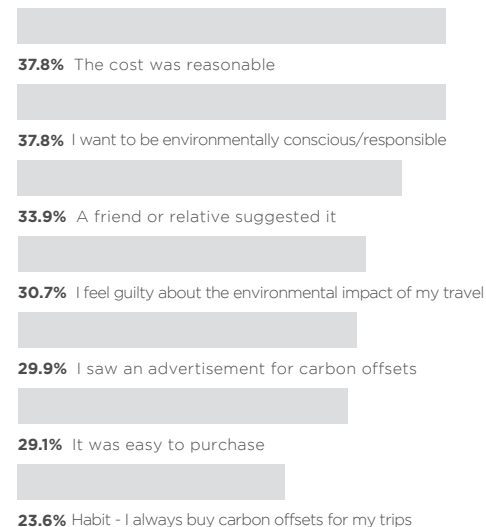
Q: Have you ever purchased a "carbon offset" for your travel?



Q: Thinking of your next vacation, what is the maximum you would be willing to spend to FULLY OFFSET your personal carbon emissions (i.e., for one person)?



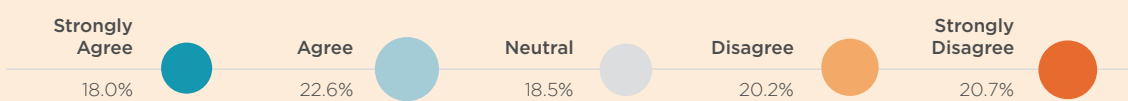
Q: What motivated you to purchase carbon offsets for your travel?



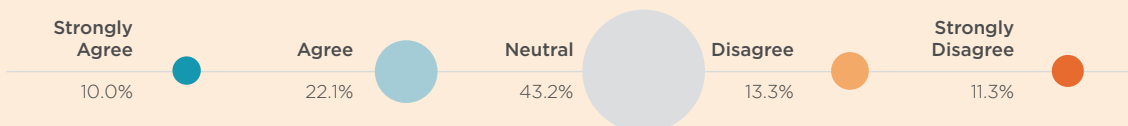
Tourism and Quality of Life

About 40% of American leisure travelers feel that they live in a popular tourist attraction. Persons living in these popular tourism destinations are likely to see the economic benefits of visitation to their communities. Fully 85% say tourism is important to their community's economic performance. This compares to only 14.6% for those living outside popular tourism destinations. Still, other benefits of a thriving tourism sector (cultural and social) may be less evident. Only 58% of those living in popular tourism destinations say tourism makes their community a better place to live.

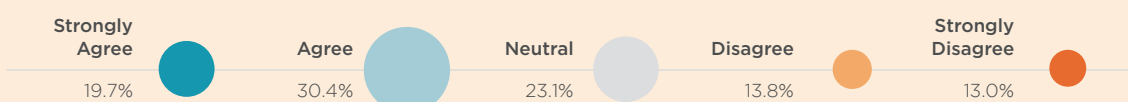
I live in a community that is a popular tourism destination.



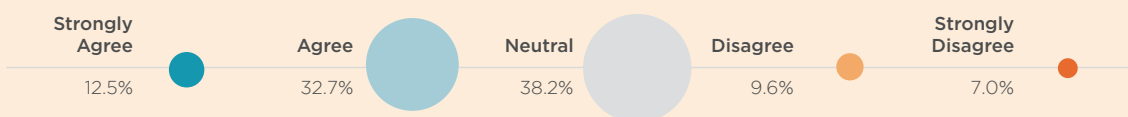
Tourism in my community makes it a better place in which to live.



Tourism is important to the economy of the community in which I live.



I enjoy interacting with visitors to my community.



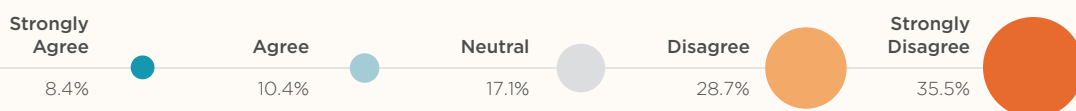
45%

Unfortunately only about 45 percent of leisure travelers say they enjoy interacting with visitors to their communities.

Over-Tourism in our Communities

Relatively few American leisure travelers say they live in communities that suffer from over-tourism. Overall, only 18.8% of travelers say they live in such a place. The issues are more acute for residents of urban areas, 32.3% of which say their community is over-touristed. Only 13.3% of residents of rural areas make such a claim. For Americans who live in over-touristed locations, the issue is considered to be serious. Nearly 60% of people say that over-tourism is a serious or extremely serious problem.

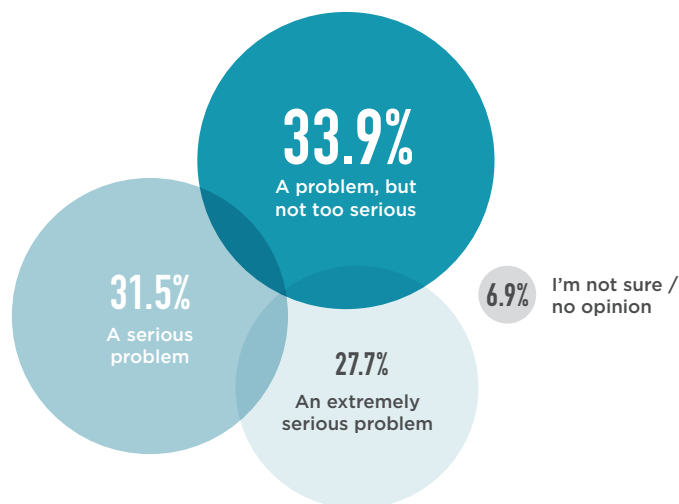
I live in a place that has an issue with **over-tourism**.
(i.e., a place that has too many tourists)



18.8%
of people feel they
live in a community
that has too many
tourists.

When asked what they feel contributes to over-tourism in their communities, too many visitors at certain times of year and population growth are seen as the two largest contributors to the problem.

Q: How serious is the problem of OVER-TOURISM where you live?



Q: Which of the following do you believe have contributed to OVER-TOURISM in your community?

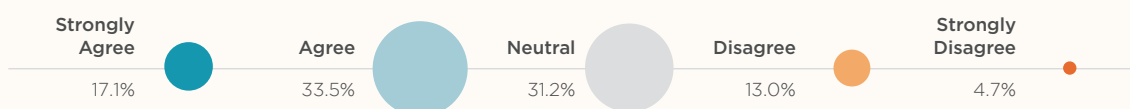


Over-Tourism and Destination Selection

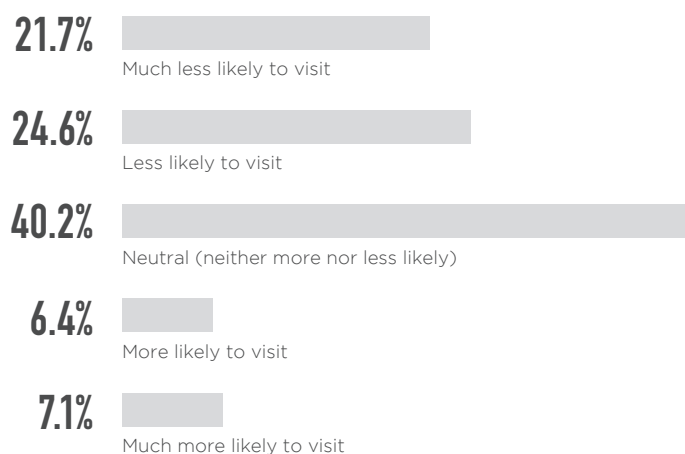
About half of American's (51.2%) say they are less likely to visit a place they perceive to have an over-tourism problem.

Nearly half of the 31.1% of leisure travelers who have experienced over-tourism first-hand report being less likely to return to the place. These travelers also have a considerable likelihood to share bad word-of-mouth with friends and family.

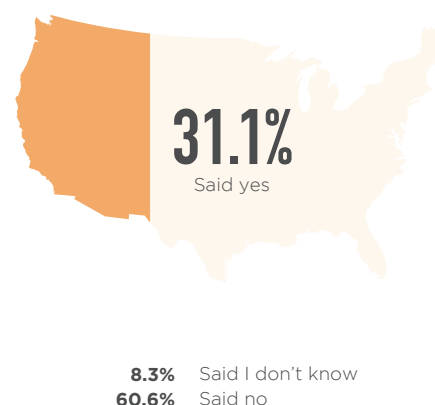
If a U.S. destination has a problem with **over-tourism**, I am less likely to visit it.



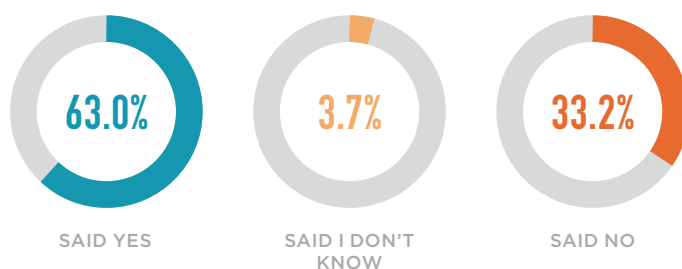
Q: Are you more or less likely to visit this place again?*



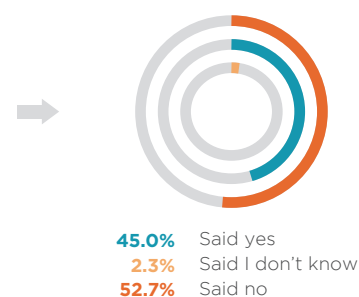
Q: In the PAST THREE (3) YEARS, have you personally visited a U.S. destination that you felt had an issue with OVER-TOURISM?



Q: Have you told any friends or relatives about this destination having an over-tourism problem?*



Q: Did you recommend they not visit that destination?*



*Respondents were asked to name a place they had visited that was over-touristed. These questions were asked about that destination.

Sustainability and America's Over-Tourism Hotspots

Survey respondents were asked (in an unaided format) to identify the U.S. destinations that first come to mind when they think of environmental sustainability issues and over-tourism. Considerable similarity exists between the two, with the country's largest cities and most visited states leading in both cases.



Destinations with perceived most severe environmental sustainability challenges

NEW YORK	36.5%
LOS ANGELES	23.7%
CALIFORNIA	23.6%
FLORIDA	14.0%
CHICAGO	11.8%
SAN FRANCISCO	5.8%
TEXAS	5.6%
LAS VEGAS	5.0%
MIAMI	4.1%
ALASKA	3.5%
NEW ORLEANS	2.4%
HAWAII	2.3%
NEW JERSEY	2.1%
ILLINOIS	2.0%
ATLANTA	2.0%
WASHINGTON DC	1.8%
COLORADO	1.6%

Destinations with perceived Over-tourism problems

NEW YORK	42.9%
LOS ANGELES	21.7%
LAS VEGAS	15.0%
CALIFORNIA	14.0%
FLORIDA	13.9%
ORLANDO/DISNEY WORLD	13.4%
MIAMI	7.5%
CHICAGO	6.5%
HAWAII	5.8%
WASHINGTON DC	5.7%
SAN FRANCISCO	5.5%
ANAHEIM/DISNEY	3.9%
YELLOWSTONE NATIONAL PARK	2.7%
NEW ORLEANS	2.7%
NEVADA	1.6%
TEXAS	1.6%
KEY WEST	1.5%
MYRTLE BEACH	1.5%
ATLANTA	1.5%
BOSTON	1.2%

Thank You



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