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The State of the American Traveler

Destination Analysts

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THE STATE OF THE AMERICAN TRAVELER

Leisure Travel Expectations Remain Stable

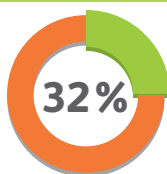
Americans' leisure travel expectations continue to be strong and stable. July results from our biannual national survey show optimism about upcoming leisure travels continues on pace with last summer. The percent of leisure travelers expecting to travel more in the upcoming

year (compared to the previous year), while down minimally from levels recorded

(continued on page 2...)

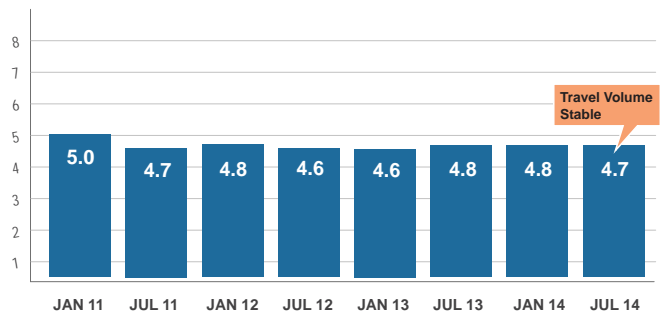
SNAP SHOT

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



Sponsored By **miles** marketing destinations

Average number of leisure trips taken (past 12 months)



Q

In the past twelve (12) months, how many trips have you taken of more than 50 miles one-way for purely leisure or personal reasons?

One	24.8%
Two	24.9%
Three	14.4%
Four	10.4%
Five or more	25.5%
AVERAGE	4.7 trips

Q

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

Zero	41.2%
One	20.4%
Two	15.6%
Three	7.1%
Four	3.8%
Five or more	11.9%
AVERAGE	2.5 trips

Q

How many of these leisure trips were primarily by automobile?

Zero	14.8%
One	26.7%
Two	21.3%
Three	11.1%
Four	7.0%
Five or more	19.0%
AVERAGE	3.2 trips

Q

How many of these leisure trips included air travel?

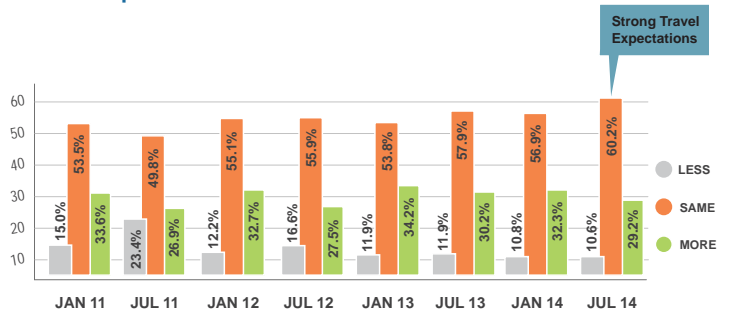
Zero	51.2%
One	22.7%
Two	14.9%
Three	4.8%
Four	2.7%
Five or more	3.7%
AVERAGE	1.1 trips

Q

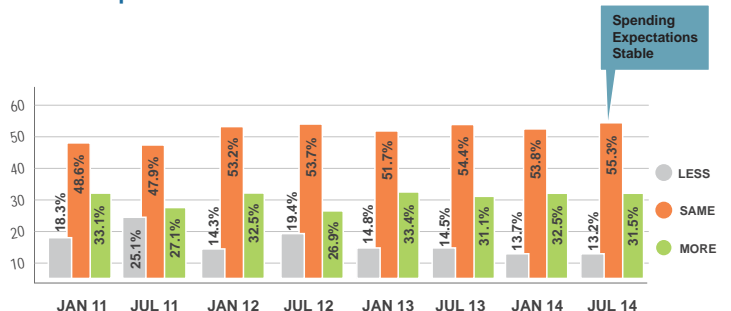
How many of these leisure trips included travel outside the United States?

Zero	77.3%
One	14.7%
Two	4.4%
Three	1.3%
Four	0.5%
Five or more	1.6%
AVERAGE	0.4 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?



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?



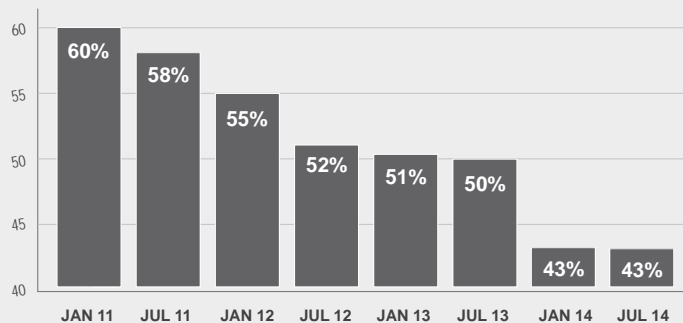
Leisure Travel Expectations Remain Stable (continued from page 1...)

last summer, remain strong. In our latest survey, the proportion of leisure travelers planning to travel more fell to 29.2 percent, down from 30.2 percent at the same point one year ago--a statistically insignificant difference. Spending expectations show stability, with 31.5 percent expecting to increase their leisure travel spending in the coming year. This compares with 31.1 percent of travelers planning to increase their leisure travel spending at the same point 12 months ago.

Strong traveler finances and modest gas prices continue to support this enthusiasm. In the latest edition of our survey, fewer travelers again reported that either personal financial concerns or high gas prices had kept them from traveling more than they would have otherwise preferred in the past 12 months. Only 36.8 percent of travelers said that "personal financial reasons" have kept them from traveling more, compared to 38.6 percent last summer. Similarly, only 32.4 percent said that high gasoline prices have had a similar effect, down from 39.5 percent in July 2013.

In the past year, Americans have shown a significantly diminished interest in travel deals and discounts. As we have discussed in previous editions of this report, in recent years we've seen a steady decline in traveler interest in saving money through discounts. In our most recent poll, fewer than half (43.4%) said they would be looking for such ways to save money. To illustrate this dramatic change, in January of 2010, fully 63.1 percent of travelers said they would be actively seeking out deals and discounts.

Will actively look for travel discounts or bargains in the next 12 months



INTEREST IN DISCOUNTS STABILIZES

The free fall in traveler interest in bargain hunting may have abated. In recent years, fewer and fewer American leisure travelers say they would be actively seeking travel discounts and bargains. Down from a high of 65.6 percent in 2010, in the last two survey waves only about 43 percent of Americans say they will be so inclined this year. This appears to be another sign that consumer psychology has shifted away from a recessionary mentality and toward what would be considered normal in periods of economic stability and growth.

Reasons for cutting back on leisure travel



	GAS TOO EXPENSIVE	PERSONAL FINANCIAL	AIRFARE TOO EXPENSIVE	SAFETY CONCERNS
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%
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%

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	36.8%
Gasoline was too expensive	32.4%
Airfare was too expensive	24.0%
I was too busy at work	17.6%
I didn't have enough vacation time	11.7%
Safety concerns	9.9%
Health/Illness	9.9%
Weather	7.5%
Lack of availability (at hotels, golf courses, spas, etc)	1.9%

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	43.4%
Travel closer to home to save money	28.4%
Visit generally less expensive destinations	20.5%
Reduce the number of leisure trips I will take	19.3%
Take at least one "staycation" (a vacation spent at home) rather than traveling	14.4%

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 16th to 20th, 2014, 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, 2,025 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.2%. 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.

Millennial Travelers Driving New Technologies

A major challenge of the modern DMO is to market effectively to many audiences. Of course, understanding how these diverse groups plan their travel is of paramount importance. The infographic below illustrates the major differences that exist between younger and older travelers. Millennials are the clear driving force behind the success of

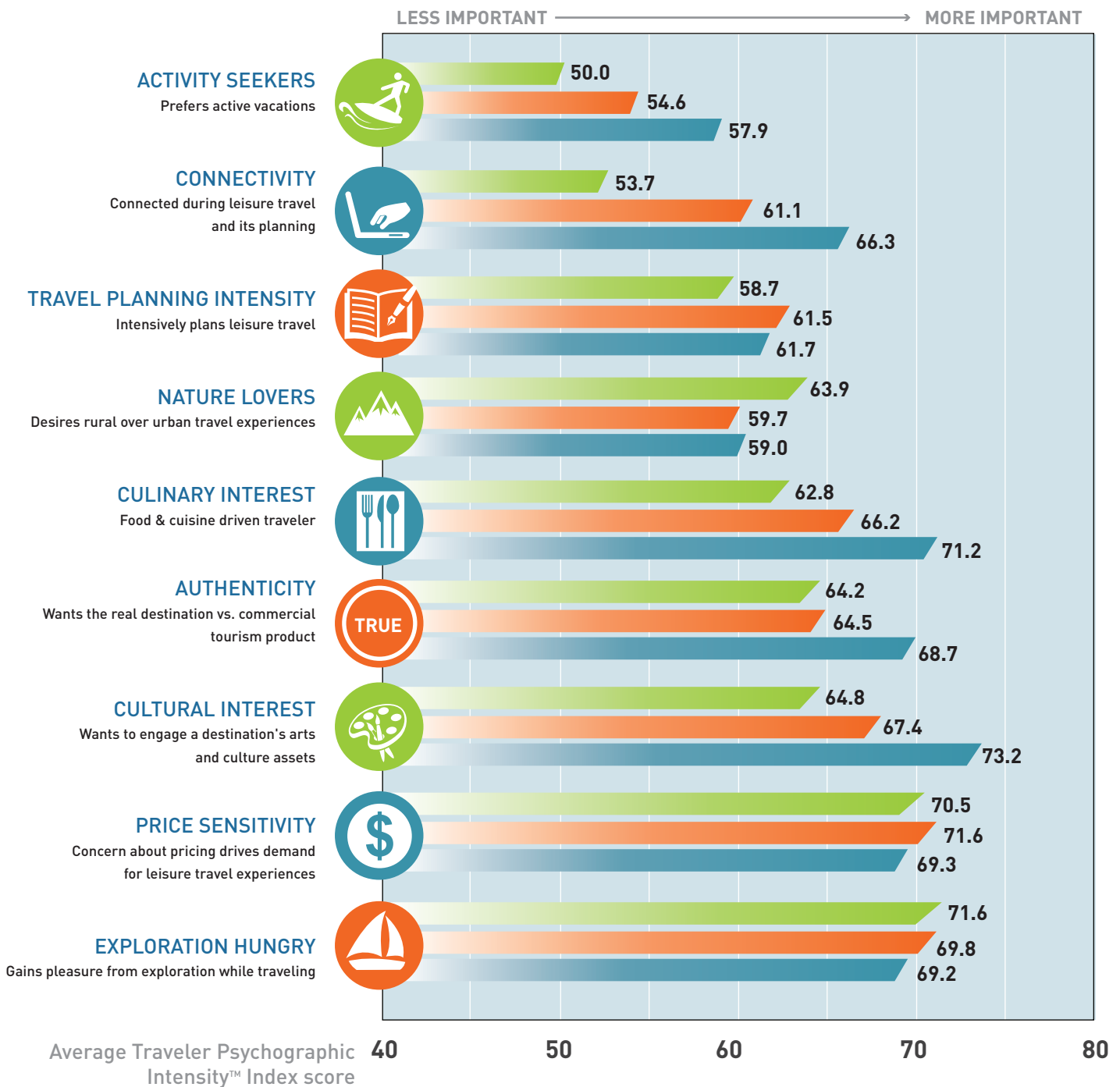
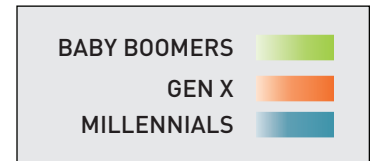
new technologies in the travel space. Their use of mobile devices and social media far outpace usage by older generations. More traditional planning resources like travel magazines, newspaper travel sections, traditional travel agents and even DMO websites are much more evenly used between the generations.



Psychographic Profile: The Generations

How they differ in their travel styles

Destination Analysts' Traveler Psychographic Intensity Indices™ show that Millennials are highly connected travelers with a bent toward authentic urban culture and culinary experiences. Baby Boomers are relatively more interested in less active, rural experiences that yield a sense of exploration. The key difference with GenX? Concern about their pocketbooks.

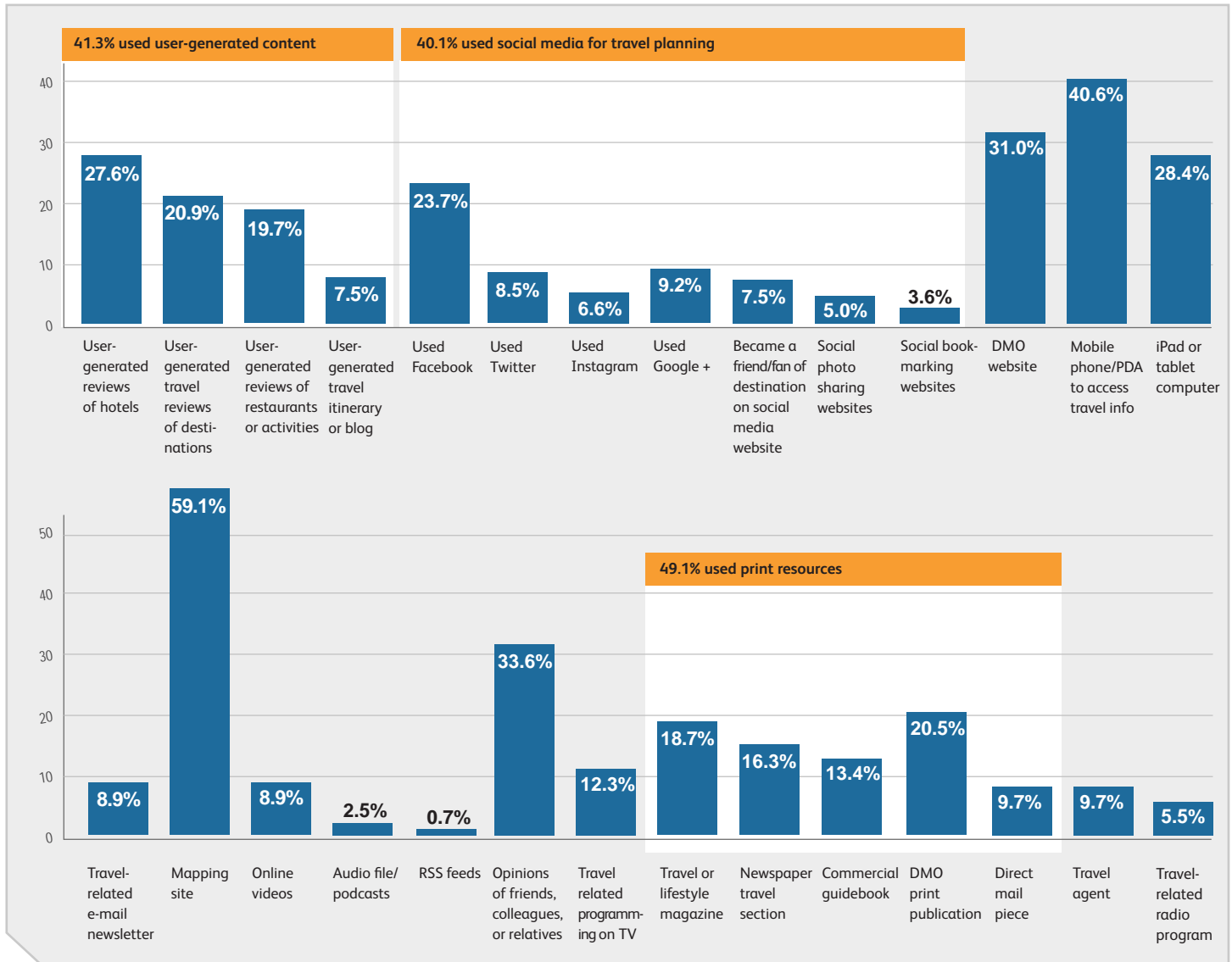


Destination Analysts' proprietary Traveler Psychographic Intensity Indices™ uses a series of related seven-point scale questions to measure the strength intensity in a traveler's feelings about aspects of leisure travel. For each psychographic category, every survey respondent is given a score of 1-100—with high scores indicating high levels of intensity or importance.

Travel Media & Technology

Technologies, 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)



Desired Video Resources

Q

At what point in your travel planning would you want to use video travel content?

(Select all that apply)

- Planning activities or things to do on my trips ___44.1%
- Destination inspiration or ideas on where to go ___41.4%
- Hotel, lodging or accommodation information ___41.0%

Q

When planning a trip, which types of travel videos would you generally be most interested in watching?

(Select the three most interesting)

- Activities and things to do ___58.3%
- Hotels and/or other lodging ___40.7%
- Destination inspiration—content focused on why I should visit and/or getting me excited about visiting ___36.1%
- Scenic video or beauty shots ___22.9%
- Practical travel tips for visiting the destination ___18.2%
- Insider information from locals ___15.2%
- Current news about the destination ___13.9%
- Fun, humorous videos about the destination ___6.4%

Destination Hotlists

UNAIDED DESTINATION INTEREST

WHAT ARE THE DOMESTIC DESTINATIONS THAT YOU WOULD MOST LIKE TO VISIT IN THE UPCOMING YEAR? *(Write in up to five)*

Las Vegas	29.9%
New York City	25.2%
Orlando (Disney World)	16.4%
Chicago	11.4%
Washington D.C.	10.3%
San Diego	10.1%
Los Angeles	9.4%
San Francisco	9.0%
Seattle	7.4%
Boston	6.8%
Miami	6.4%
New Orleans	5.7%
Grand Canyon N.P.	5.6%
Anaheim (Disney Land)	4.1%
Atlantic City	4.1%
Denver	4.0%

WHAT ARE THE FOREIGN COUNTRIES THAT YOU WOULD MOST LIKE TO VISIT IN THE UPCOMING YEAR? *(Write in up to five)*

United Kingdom	28.0%
Canada	25.8%
Italy	22.8%
France	20.3%
Mexico	19.9%
Ireland	10.4%
Japan	9.8%
Australia	8.7%
Spain	8.7%
Germany	7.1%
China	6.0%
Jamaica	5.2%
Bahamas	4.3%
Greece	4.2%
Brazil	3.7%
New Zealand	3.5%

RECENT VISITATION AND LIKELY FUTURE VISITATION

(Selected Domestic Leisure Destinations)

	VISITED <i>(Past 3 years)</i>	LIKELY TO VISIT <i>(Next 3 years)</i>	EITHER VISITED OR LIKELY TO VISIT
Las Vegas, Nevada	26.8%	34.1%	45.2%
New York, New York	25.6%	28.7%	40.5%
Los Angeles, California	25.8%	24.8%	39.3%
San Francisco, California	18.7%	23.5%	35.3%
Orlando, Florida	19.2%	25.2%	33.9%
Washington, DC	17.0%	21.7%	31.5%
Chicago, Illinois	18.6%	21.9%	30.5%
Napa County, California	15.6%	21.4%	30.0%
Boston, Massachusetts	15.3%	19.2%	27.1%
New Orleans, Louisiana	9.0%	19.9%	24.4%
Miami, Florida	12.2%	17.3%	24.0%
Lake Tahoe Area (California/Nevada)	11.2%	16.9%	23.8%
Seattle, Washington	9.6%	17.6%	23.3%
Philadelphia, Pennsylvania	14.4%	14.4%	23.0%
Denver, Colorado	10.9%	16.7%	22.7%
Niagara Falls, New York	10.3%	15.0%	22.5%
Newport Beach, California	10.2%	14.8%	22.4%
Nashville, Tennessee	11.5%	14.3%	22.0%
Sonoma County, California	11.0%	15.3%	21.8%
Atlanta, Georgia	12.2%	13.7%	21.2%
Atlantic City, New Jersey	11.8%	14.7%	21.1%
The Florida Gulf Coast	11.3%	15.5%	21.1%
Dallas, Texas	10.9%	14.2%	20.2%
Tampa, Florida	10.9%	10.9%	20.0%
San Antonio, Texas	8.5%	12.8%	18.1%
Baltimore, Maryland	11.0%	11.0%	18.0%
San Diego, California	8.7%	11.8%	17.5%
Santa Barbara County, California	6.5%	13.2%	17.5%
Portland, Oregon	7.0%	13.0%	17.2%
Phoenix, Arizona	9.2%	11.0%	17.2%
Anaheim/Disneyland, California	6.8%	12.0%	16.8%
St. Louis, Missouri	9.1%	10.5%	16.7%
Savannah, Georgia	6.6%	11.8%	16.6%
Reno, Nevada	7.8%	11.0%	16.1%
Anchorage, Alaska	4.4%	12.4%	16.0%
Houston, Texas	8.2%	10.9%	16.0%
Austin, Texas	7.0%	11.4%	15.5%
Branson, Missouri	6.6%	11.0%	15.5%
Memphis, Tennessee	6.8%	10.0%	14.8%
Clearwater/St. Petersburg, Florida	6.8%	10.4%	14.4%
Minneapolis, Minnesota	8.1%	9.2%	14.3%
Pittsburg, Pennsylvania	8.5%	9.0%	14.3%
Kansas City, Missouri	7.8%	9.0%	14.2%
Louisville, Kentucky	7.5%	8.4%	13.4%