

geo·tour·ism *n.* tourism that sustains or enhances the geographical character of the place being visited—its environment, culture, aesthetics, heritage, and the well-being of its residents

Phase One: Executive Summary

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The Geotourism Study:

Phase I Executive Summary

Sponsored By

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Prepared by
The Research Department of the
Travel Industry Association of America
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*Travel Industry Association
of America*

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Introduction

In the last century, leisure travel moved from an activity of the wealthiest to the inalienable “birth-right” of everyone. Today more than 154 million American adults can be described as “travelers” having taken at least one trip 50 miles or more, one way, away from home and/or including one night or more away from home, within the past three years. Nearly 90 percent of these travelers (139 million) have taken a leisure trip in the past year and over half have taken an air trip in the past year. This huge number of travelers has fueled increases for the industry, and ever evolving needs and expectations.

There are issues in travel that are paramount for the industry and with consumers alike; value, safety and security will always be among them. But new questions arise as we seek to anticipate what’s ahead for the industry in the way of consumer expectations. What has become evident to many who are in the industry is that consumers are seeking out uniquely different experiences when they travel, and have a set of possibly previously unspoken requirements of destinations, tour companies, lodging establishments and even transportation.

The concept of sustainable tourism is not new to the travel industry. In the past, its primary concern was to sustain balance with the ecological environment and minimize the impact upon it by mass-market tourism. The term “Geotourism” is closely related, but is concerned instead with preserving a destination’s geographic character—the entire combination of natural and human attributes that make one place distinct from another. Geotourism encompasses both cultural *and* environmental concerns regarding travel, as well as the local impact tourism has upon communities and their individual economies and lifestyles.

What has evolved over the past decade is abiding consumer awareness—and subsequent concern—that destinations are morphing into homogenous places that offer like experiences. Environmental issues have evolved into the more basic concerns for popular destinations such as the National Parks, which are affected by simply too many visitors. Not only are the parks sustaining irreversible environmental damage, the quality of the visitor experience is suffering. We are, in effect, “loving places to death”.

In an effort to please everyone and to make them feel “at home”, the travel industry risks sacrificing the very things that attracted consumers in the first place. What has resulted is a loss of distinctive characteristics, an erosion of local customs and cuisines, an absence of regional architecture and general culture. *The Geotourism Study* finds that it is these factors that primarily attract the consumers who take the most trips, spend the most money, and produce the greatest volume of visitors overall. At its core, Geotourism represents restorative and reconstructive forms of tourism that enhances a destination’s natural and cultural distinctiveness, as well as provides a high-quality visitor experience.

Overview of Study Results

The Geotourism Study created eight Geotourism profiles of the respondents to a large-scale survey through an examination of attitudes, behaviors and actual travel habits. Demographically the 154 million adult American travelers are somewhat different than Americans who do not travel. Most travelers (65%) are city-dwellers living in urban areas with populations of 500,000 or more. Four in ten (43%) are Baby Boomers between the ages of 35 and 54. About 30 percent are Generation X and Y (age 18 to 34), and 27 percent fall into the Matures category, age 55 and over. Nearly half (45%) of American travelers have a college education. Thus, the average annual household income among travelers is higher than that of the U.S. population in general (\$62,720 vs. \$57,047). Most American travelers work full or part time (68%) and 17 percent are retired. Four in ten have households with children under the age of 18 present.

To create a *Geotourism* profile of American travelers, this study covered several survey topics:

- Attitudes about pleasure/vacation travel outside their local areas
- Preferences for specific types of leisure trips
- Importance of different aspects of leisure trips
- Household, leisure or civic activities at home or within their local area
- Attitudes relating to culture, heritage or the environment
- Attitudes towards tourism as it pertains to their local area

Overall, the majority of the traveling public (71%) indicates that it is important to them that their visits to a destination not damage its environment. Nearly two thirds agree (61%) that their travel experience is better when the destination preserves its natural, historic, and cultural sites and attractions. Many travelers (58%) support controlling access to National Parks and public lands so they can be preserved and protected. Over half (53%) of travelers agree that their travel experience is better when they have learned as much as possible about their destination's customs, geography, and culture. The tables on Pages 3 and 4 present other selected results from the study among all American travelers.

Results from the survey topics above were also statistically combined and analyzed to segment travelers based on like responses. This segmentation process created eight market segments, each with unique *Geotourism* profiles. Segmentation results showed that:

- Three segments share similar levels of income and a high incidence of travel, yet each possesses a somewhat unique *Geotourism* profile. Still, all three groups have the strongest *Geotourism* inclinations compared to the other market segments. In total, these three groups represent 55.1 million Americans, greater than one third of the total 154 million American travelers.

Geo Savvys (16.3 million travelers)
Urban Sophisticates (21.2 million travelers)
Good Citizens (17.6 million travelers)

- Three other segments can be grouped by income and travel behaviors, though these three vary from each other in age, lifestages, and attitudes. These three segments can be considered potential markets for *Geotourism*. In total, these segments also make up more than a third (58.3 million) of all adult American travelers.

Traditionals (16.1 million travelers)
Wishful Thinkers (22.3 million travelers)
Apathetics (19.9 million travelers)

- Two segments stand apart from the other traveler segments due to extreme attitudes and behaviors in travel. Ironically, these segments are also at opposite ends of the spectrum in terms of income and travel preferences. These two segments show the lowest potential for *Geotourism* behavior.

Outdoor Sportsmen (21.0 million travelers)
Self-Indulgents (19.9 million travelers)

	Total* (\$62.7K) (5.2 trips)	Geo-Savvys (\$68.2K) (7.6 trips)	Urban Sophist- icates (\$76.6K) (6.4 trips)	Good Citizens (\$70.6K) (5.8 trips)	Tradi- tionals (\$53.1K) (4.2 trips)	Wishful Thinkers (\$53.4K) (3.9 trips)	Apa- thetics (\$64.1K) (4.6 trips)	Outdoor Sports- men (\$54.0K) (5.0 trips)	Self-Indul- gents (\$68.8K) (5.7 trips)
<i>Average annual HH income</i>									
<i>Average no. of total trips taken per year</i>									
<i>In Percent</i>									
My travel experience is better when my destination preserves its natural, historic, and cultural sites and attractions.	61	81	77	63	68	50	41	62	55
My travel experience is better when I'm seeing or doing something authentic.	40	60	54	44	36	39	24	33	39
My travel experience is better when I have learned as much as possible about my destination's customs, geography, and culture.	53	72	74	61	63	38	38	39	52
It is important to me that travel companies I use employ local residents and support the local community.	31	39	38	31	45	27	29	28	16
It is important to me that my visit to a destination not damage its environment.	71	84	83	75	79	69	61	73	53
I think sprawling development is a major problem.	59	76	78	66	63	48	49	63	37
Agree that there should be more public and/or private funding for preservation of our nation's historic sites and monuments.	54	73	73	62	62	44	40	47	35
There should be more careful regulation of the use of our National Parks and public lands.	59	69	77	67	65	58	54	52	32
Support controlling access to National Parks and public lands so that the environment can be preserved and protected.	58	68	76	70	72	60	44	49	36

*Total=American travelers who took at least one trip in the past three years.

	Total*	Geo-Savvys	Urban Sophist-icates	Good Citizens	Tradi-tionals	Wishful Thinkers	Apa-thetics	Outdoor Sports-men	Self-Indul-gents
<i>Average annual HH income</i>	(\$62.7K)	(\$68.2K)	(\$76.6K)	(\$70.6K)	(\$53.1K)	(\$53.4K)	(\$64.1K)	(\$54.0K)	(\$68.8K)
<i>Average no. of total trips taken per year</i>	(5.2 trips)	(7.6 trips)	(6.4 trips)	(5.8 trips)	(4.2 trips)	(3.9 trips)	(4.6 trips)	(5.0 trips)	(5.7 trips)
	<i>In Percent</i>								
Very/extremely likely to take trips including high-quality accommodations with excellent facilities and fine dining.	45	21	67	44	38	54	48	15	70
Very/extremely important that trip provides educational experiences for me/family.	55	73	61	66	65	46	27	48	60
Very/extremely important that trip provides opportunity to indulge in luxury and be pampered (i.e., luxury hotels, fine dining).	35	5	46	35	30	45	45	12	53
Very/extremely likely to buy products and services from particular companies because I know that they donate part of their proceeds to charitable organizations.	30	44	41	52	36	17	19	22	14
Very/extremely likely to attend performing arts events (e.g., theatre, symphony, opera, ballet, etc.) in my local area.	28	46	51	60	21	6	14	7	30
Very/extremely likely to visit histories sites and/or museums in my local area.	40	65	57	75	39	16	15	30	37
Very/extremely likely to take trips to places where I can experience people, lifestyles and cultures very different from my own.	49	81	75	52	44	51	15	25	56
Very/extremely likely to take trips to destinations that have authentic historic or archeological buildings and sites.	52	83	73	53	55	44	12	48	59

*Total=American travelers who took at least one trip in the past three years.

Summary

This is the first examination of its kind of American travelers – a tremendous undertaking in ferreting out traveler attitudes that lead to potential sustainable tourism behavior and in giving the travel industry insight into future consumer expectations. The results of *The Geotourism Study: Phase I* show that there are at least 55.1 million Americans who could be classified as “sustainable tourists” or “Geotourists”. The travel habits of these segments—Geo-Savvys, Urban Sophisticates, and Good Citizens—are guided by their high awareness of the world around them. These travelers have ceaseless expectations for unique and culturally authentic travel experiences that protect and preserve the ecological and cultural environment. In addition, the other segments represent close to 100 million traveling Americans that could be moving in that direction.

Now that we know who they are, how do we reach them? How does the travel industry respond to their needs and meet their expectations? What kind of economic impact will these consumers have on the future of travel? How quickly will the clusters outside the core Geotourist groups move in this direction, or will they? The next phase of the Geotourism study will re-survey several of these traveler segments to answer these questions. The second phase may also yield a potential consumer panel that could give the industry continuous insight into how Geotourism can expand and flourish while enhancing the travel experience.

Geo-Savvys

Demographic Profile

- Geo-Savvys are slightly more likely to be women (54%) than men (46%).
- Over half of women in the segment are baby boomers (53%); 47 percent of men are baby boomers.
- One in four Geo-Savvys is a young adult under age 35.
- Along with Urban Sophisticates and Good Citizens, they are very well educated with 61 percent having at least a college degree. One in four (25%) has a graduate degree.
- One third of Geo-Savvys (32%) hold professional/specialty positions, similar to Urban Sophisticates and Good Citizens. While only 8 percent are students, Geo-Savvys are more likely than other clusters to still be in school.
- Geo-Savvys are also quite affluent. Over one third (38%) have annual household incomes over \$75,000; 17 percent have household incomes above \$100,000.
- Due to their middle-age status, many (38%) Geo-Savvys are in the older parent or working older couple lifestages. Over one quarter (29%) are in the young or middle parents lifestages.
- Over one quarter of Geo-Savvys (26%) live in the Pacific region. They are more likely than almost all other segments to do so. Although only 10 percent live in the Mountain region, this is a factor that distinguishes Geo-Savvys from all other clusters.
- Half (51%) live in large cities or urban areas. Like Urban Sophisticates, one in five (22%) lives in a slightly smaller city of 500,000 to 2 million in population.

Geo-Savvys

- 16.3 million adults
- 43 years average age; 50% Baby Boomers
- \$68,220 average HH income; 38% \$75K+
- 41% have kids in household
- 74% work full/part-time
- 12% are retired
- 24% Older Parents, 16% Young Parents, 14% Working Older Couples, 13% Middle Parents
- 7.6 average no. of past-year trips
- 5.3 average no. of past-year leisure trips
- 58% are past-year business travelers
- 65% are past-year air travelers

Travel Profile

- Geo-Savvys also travel quite frequently, with 45 percent taking five or more trips in the past year. This group has the highest average number of annual trips (7.6) compared to all segments.
- Geo-Savvys are highly likely to have traveled internationally. Four in ten (44%) Geo-Savvys have taken at least one international trip in the past three years; 17 percent have taken at least three trips outside the U.S. in the past three years.
- Most (65%) Geo-Savvys are infrequent leisure travelers, taking one to four leisure trips in the past year. Nevertheless, they report the highest average number of annual leisure trips (5.3) compared to all other segments.

- Geo-Savvys have a high incidence of business travel, with 58 percent taking at least one business trip in the past year.
- Due to a high propensity for leisure and business travel, the majority (65%) of Geo-Savvys have taken one or more trips by air in the past year.
- Overall, the Geo-Savvys travel profile is most similar to that of Urban Sophisticates.

Geotourism Profile

- Geo-Savvys show a distinct preference for culturally/socially-oriented travel. The majority (81%) believes their experience is better when their destination preserves its natural, historic, and cultural sites and attractions, the highest share of all segments. Three-quarters (73%) say that the educational experience provided by travel is very important to them.

Attributes of Travel:

Geo-Savvys are more likely than any other cluster group to do the following:

- 83% visit destinations with authentic historic and archeological sites
- 81% prefer small-scale accommodations run by local people
- 81% travel to experience people, lifestyles, and cultures very different from their own
- 80% visit small towns and rural areas
- 73% feel it is important to learn about their destination's people, history, and culture

Distinguishing Characteristics:

- What really distinguishes Geo-Savvys from similar groups (e.g., Urban Sophisticates) is their well-above average interest in environmentally-oriented travel. It is more important to Geo-Savvys than to any other cluster that they not damage the environment when they travel (84%). They are nearly three times above average in enjoying primitive travel to wilderness areas (59%). They are twice as likely than average to like outdoor adventure travel, offering challenge, risk and excitement (57%) or to travel to remote locales (66%). Geo-Savvys' at-home behaviors also reflect these environment attitudes.
- They are the most likely of all segments to enjoy outdoor recreation (73%) and sports (63%) in their local area; read or watch shows about nature and the environment (61%); donate money to nature/environmental organizations (37%); subscribe to nature/environmental publications (35%); or to be a member of an environmental, development or human rights group (30%) or a nature club (18%).

Attitudes and Behavior:

- Geo-Savvys are intellectually curious, with the highest level of reading or watching shows about history or culture (74%). They are second only to Good Citizens in watching public TV (71%); visiting historic sites in their local area (65%); taking educational classes and/or attending seminars or lectures (43%); participating in civic organizations (37%); donating money to (40%) and/or volunteering for (33%) historic, cultural, or educational organizations; or visiting local art galleries or museums (46%). Geo-Savvys believe it is important to learn about other cultures (85%) and to pass on our nation's history to the next generation (93%). They are also well above average on their support of controlled access to our National Parks and public lands (68%).

- Geo-Savvys have well-developed social consciences. Most Geo-Savvys say they recycle (89%) and try to save electricity and water at home (85%). Above-average shares buy energy-efficient appliances, even if they cost more (60%). They also buy environmentally safe household products (47%) and organic food products (27%), as well as buy from companies that donate to charities (44%).

Urban Sophisticates

Demographic Profile

- Urban Sophisticates are more likely to be women (60%) than men (40%).
- Over half of these women are baby boomers (53%); 29 percent are younger women under age 35.
- One third of men in the Urban Sophisticates segment are 55 years of age or older (33%).
- Urban Sophisticates, along with Good Citizens and Geo Savvys, are very well educated with 63 percent having at least a college degree, and one in four having a graduate degree.
- Given their higher education levels, it is not surprising that over one in five (23%) has an executive/managerial occupation and 32 percent have professional/specialty positions. In fact, Urban Sophisticates are the most likely of all segments to hold executive or managerial positions.
- Urban Sophisticates' higher education levels and occupations are driving higher annual household incomes for this group. Nearly half (46%) have annual incomes of \$75,000 or more. One in four (24%) Urban Sophisticates has an annual income of at least \$100,000, more than any other segment.
- Given that many Urban Sophisticates are baby boomers, it is not surprising that 39 percent are in the working older couple or older parent lifestages. Yet, a significant percentage of this cluster, one in four (25%), is in the young couple or young parent lifestage.
- One quarter of this segment (24%) lives in the Pacific region, and along with Geo-Savvys, they are the most likely of the other segments to reside in this region. One in five (20%) Urban Sophisticates lives in the South Atlantic region.
- Of course, over half (56%) of Urban Sophisticates live in large cities or urban areas. Only one in five lives in only slightly smaller cities of 500,000 to 2 million in population.

Urban Sophisticates

- 21.2 million adults
- 45 years average age; 50% Baby Boomers
- \$76,630 average HH income; 46% \$75K+
- 30% have kids in household
- 73% work full/part-time
- 12% are retired
- 21% Older Parents, 18% Working Older Couples
- 6.4 average no. of past-year trips
- 4.3 average no. of past-year leisure trips
- 58% are past-year business travelers
- 73% are past-year air travelers

Travel Profile

- Urban Sophisticates travel quite frequently, taking 6.4 trips per year on average. In fact, 40 percent of this segment traveled five or more times in the past year.

- Urban Sophisticates are the most likely of all segments to travel internationally. Nearly half (48%) have taken at least one international trip in the past three years. One in five (20%) has taken three or more trips outside the U.S. in the past three years.
- Most (65%) Urban Sophisticates took one to four leisure trips in the past year. Along with Good Citizens, however, they have a relatively high average annual number of leisure trips (4.3) compared to the average American traveler.
- Given their occupations and income, it is not surprisingly that Urban Sophisticates have a high incidence of business travel. Most (58%) have taken at least one business trip in the past year.
- Due to a high propensity for leisure and business travel, the majority of Urban Sophisticates (73%) have taken one or more trips by air in the past year.

Geotourism Profile

- Urban Sophisticates, like Geo-Savvys, prefer culturally and socially oriented travel and are interested in learning about the people, customs, and history of their destinations. They are more likely than any other group, except Geo-Savvys, to take trips to experience people, lifestyles, and cultures very different from their own (75%). They are also second only to Geo-Savvys in wanting to learn as much as possible about their destination's history, people, culture, and geography (67%), and the most likely of all segments to say that the opportunity to try local foods and cuisine (81%) is very important to them when they travel.

Attributes of Travel:

- 73% of Urban Sophisticates prefer trips to destinations offering authentic historic or archeological sites
- 86% take trips where they can spend time exploring historic and charming towns and locations
- 74% of Urban Sophisticates prefer destinations that offer a wide variety of cultural/arts events and attractions
- 63% of Urban Sophisticates also enjoy, however, visiting large cities, as well as high quality accommodations with excellent facilities and fine dining (67%), second only to Self-Indulgents. They are second only to Geo-Savvys in wanting to experience the outdoors, but with comfortable accommodations (74%).

Distinguishing Characteristics:

- While not overly environmentally-oriented in their travel preferences, Urban Sophisticates are the most concerned of all the groups about living in harmony with nature (88%); controlling access to the National Parks and public lands (76%), and to historic sites (67%) to preserve and protect them; and being willing to pay a premium to visit places that control access (28%).
- More than 34 percent of Urban Sophisticates report that tourism has a dominant role in the local economy of the area in which they reside. Above-average shares hold positive views about tourism, feeling it enhances the strength and vitality of their local economies (54%), while also improving the image of their local area (54%).

Attitudes and Behavior:

- At home, Urban Sophisticates also show their cultural orientation. Well-above average shares of these travelers dine in ethnic or specialty restaurants (74%), attend festivals and ethnic celebrations (55%), attend performing arts events (51%), and visit art museums and galleries

(45%) in their local areas. They also tend to read and watch shows about history and culture (60%) and watch publicly supported TV (64%).

- The majority hold strong beliefs about the importance of learning about different cultures (84%), the importance of passing on our history to future generations (90%), and the need for more funding for the preservation of historic sites (73%) and the cultural, visual and performing arts (63%).

Good Citizens

Demographic Profile

- Good Citizens are more likely to be women (54%) than men (46%).
- Over half of men in this segment are age 55 or over (56%). Nearly half of women are age 55 or over (46%).
- Along with Urban Sophisticates and Geo Savvys, Good Citizens are well educated with 63 percent having at least a college degree, and 23 percent with a graduate degree.
- Fifteen percent have executive/managerial occupations and 33 percent have professional/specialty occupations, also similar to Urban Sophisticates and Geo-Savvys. The Good Citizens cluster is more likely to include homemakers (16%).
- Given their education and occupations, it is not surprising that Good Citizens average annual household income (\$70,650) is among the highest of all segments. Four in ten Good Citizens (42%) have annual household incomes above \$75,000.
- Reflecting their age, many (37%) Good Citizens are in the two older couples lifestyles. In fact, 18 percent are retired older couples, more than any other group except Traditionals. Like Traditionals, Good Citizens are significantly more likely than other segments to be in the older singles lifestyle (8%).
- Nearly one fifth (19%) live in South Atlantic states; 17 percent live in the Pacific region.
- Half (50%) live in large cities or urban areas; in fact Good Citizens are more likely to do so than many of the other cluster groups. Nearly one in five lives in a rural area (18%).

Good Citizens

- 17.6 million adults
- 55 years average age; 51% Matures
- \$70,650 average HH income; 42% \$75K+
- 28% have kids in household
- 54% work full/part-time
- 34% are retired
- 26% Older Parents, 19% Working Older Couples, 18% Retired Older Couples
- 5.8 average no. of past-year trips
- 4.3 average no. of past-year leisure trips
- 56% are past-year business travelers
- 63% are past-year air travelers
- 38% traveled internationally in past 3 years

Travel Profile

- On average, Good Citizens take 5.8 trips per year on average, but most (59%) are infrequent travelers taking only one to four trips per year.
- One in three (38%) has traveled internationally at least once in the past three years. Good Citizens are not as well-traveled as Urban Sophisticates and Geo-Savvys, as only 13 percent of Good Citizens have taken three or more international trips in the past three years.

- Most (65%) Good Citizens are infrequent leisure travelers (1-4 leisure trips per year). Yet along with Self-Indulgents, Urban Sophisticates, and Geo-Savvys, Good Citizens have a relatively high average annual number of leisure trips (4.3).
- Despite the fact that 18 percent are in the retired older couples lifestage, Good Citizens have a high tendency toward business travel, as do Urban Sophisticates and Geo-Savvys. A majority of Good Citizens (56%) travel for business at least once a year. On average, Good Citizens take two business trips per year.
- Given their propensity to travel for both leisure and business, it is not surprising that 63 percent of Good Citizens have taken at least one trip by air in the past year.

Geotourism Profile

- What distinguishes Good Citizens from other groups is their strong involvement in a number of community activities, as well as their heightened level of cultural and environmental awareness and sensitivity, as manifested in behaviors in their local areas. These tendencies are less obvious in their travel behavior.

Attributes of Travel:

When they travel, Good Citizens are more likely than others to want to have the following:

- 88% want high levels of cleanliness
- 79% want high levels of safety and security
- 60% want high quality visitor services and personnel
- 43% want to meet travelers who share their interests

Distinguishing Characteristics:

- Good Citizens are more likely than any other group to participate in civic organizations (55%); to volunteer for (54%) or make donations to (55%) historic, cultural and educational organizations; to volunteer for nature-related or environmental organizations (29%); or to write to politicians or companies to express their opinions about their environmental or business practices (42%). They are also the most likely to read a daily newspaper (89%), to attend religious services (82%), or to vote in national (95%) and state/local elections (95%).
- Good Citizens also report the greatest propensity to buy environmentally safe household products, even if they cost more (55%). Similarly, this group is also most likely to buy from companies that donate to charities (52%) and from companies that make an effort to preserve and protect the environment (47%). And, they have the greatest tendency to recycle bottles, cans, and newspapers at home (90%).

Attitudes and Behavior:

- Good Citizens have a greater than average tendency to support controlling access to National Parks and other public lands (70%) in order to better preserve them. Most believe that there should be more careful regulation of National Parks and public lands (67%). And, they are more likely than average to agree that there should be more funding for cultural/visual/performing arts (58%).
- Good Citizens are also very involved in cultural activities in their home communities. Well over half (56%) take educational classes or attend seminars or lectures; attend performing arts events

(60%); visit art museums or galleries (62%); or visit historic sites/museums in their local area (75%). These are the highest percentages of all the groups.

- Good Citizens are also avid readers with the greatest propensity of all groups to subscribe to general interest (57%) and news (46%) magazines. They are the most likely to belong to a political party (57%), a professional association (46%), or an alumni organization (48%). They are nearly three times more likely than travelers overall to subscribe to season tickets for performing arts (17%).

Traditionals

Demographic Profile

- Traditionals are more likely to be women (61%) compared to all other segments except Urban Sophisticates.
- Most women are 55 years of age or older (57%), as well as most men (63%).
- Few Traditionals are young adults under the age of 35.
- One third of the Traditionals cluster (32%) holds a high school degree or less. Just 36 percent have a college degree.
- Traditionals are more likely than all other segments to be homemakers (27%). One in five Traditionals (18%) holds a professional/specialty position.
- Traditionals have one of the lowest average annual household incomes compared to the other segments (\$53,150). Over half of Traditionals (56%) have annual incomes under \$50,000.
- Over one in four (27%) Traditionals is in the retired older couple lifestage, more than any other segment. Some older Traditionals are in the older parent (22%) and working older couple (16%) lifestages.
- Nearly one quarter (23%) live in the South Atlantic states. One in five (18%) lives in the East North Central region.
- Over half (56%) live in large cities or urban areas.

<u>Traditionals</u>
• 16.1 million adults
• 58 years average age; 59% Matures
• \$53,150 average HH income; 23% \$75K+
• 24% have kids in household
• 43% work full/part-time
• 42% are retired
• 27% Retired Older Couples, 22% Older Parents
• 4.2 average no. of past-year trips
• 3.4 average no. of past-year leisure trips
• 46% are past-year business travelers
• 48% are past-year air travelers

Travel Profile

- At 4.2 trips in the past year, Traditionals show the lowest average travel frequency compared to the other segments. Only 28 percent take five or more trips per year.
- Most (75%) Traditionals have not taken an international trip in the past three years.

- Like other segments, most Traditionals who travel for leisure have taken only one to four leisure trips in the past year (70%).
- Fewer than half (46%) have taken one or more business trips in the past year. Traditionals who do travel for business have taken an average of only one business trip in the past year.
- Fewer than half (48%) have taken a trip by air in the past year, probably due to Traditionals' low frequency of travel.
- Overall, the Traditionals travel profile is most similar to that of Apathetics and Wishful Thinkers.

Geotourism Profile

- Like Good Citizens, the Traditionals segment is an older demographic group, not as inclined to travel as many of the other groups. Generally less educated than Good Citizens, they do not share the former group's high level of involvement in many cultural and environmental activities in their local areas. They are also well below average in their interest in culturally oriented travel, and exceptionally low on nature or outdoor-related travel.

Attributes of Travel:

Traditionals are conservative travelers and more likely than any other group to do the following:

- 65% seek no surprises when they travel
- 77% prefer family-friendly destinations
- 66% prefer trips to places where their families were from
- 53% prefer groups tours with pre-set itineraries and tour guides
- 45% like to meet other travelers who share their interests

When they travel, they are also the most likely of all groups to want the following:

- 94% want high levels of cleanliness
- 89% want high levels of safety and security
- 66% want high quality visitor services and personnel
- They are also the second most likely, after Apathetics, to say that they don't eat foods to which they are not accustomed when they travel (38%).
- Traditionals are the least likely of all the groups to take outdoor adventure trips, offering challenge, risk and excitement (5%) or hunting/fishing trips (5%). They also report well-below average interest in travel to remote locations (11%), and are not interested in visiting destinations where people do not speak English (8%) or primitive travel in the wilderness (3%).

Distinguishing Characteristics:

- Traditionals are above average in supporting controlled access to National Parks and public lands (72%) and to historic buildings and monuments (63%) in order to preserve and protect them. However, they are not activists by nature, reporting significantly below-average tendencies to volunteer for or donate money to a variety of types of organizations.

Attitudes and Behavior:

- Traditionals are similar to Good Citizens in their tendency to attend religious services (72%), to read a daily newspaper (76%), and to vote in national (91%) or in state/local elections (89%).

- Nevertheless, Traditionals are quite positive in their attitudes about tourism. An above-average share believes that tourism enhances the strength and diversity of their local economy (52%) and that the variety and quality of services in their local areas have improved because of tourism (42%). They are also more likely than travelers overall to believe that tourism enhances the overall the quality of life in their local areas (40%) and to believe that tourists' behavior in their local areas has made them more aware of how to behave when they travel (39%).

Wishful Thinkers

Demographic Profile

- Wishful Thinkers are equally likely to be women or men.
- This group is overwhelmingly young, with 71 percent of Wishful Thinkers women and 59 percent of Wishful Thinkers men between the ages of 18 and 34.
- Few Wishful Thinkers are 55 years of age or older.
- Given their young age, it is not surprising that few Wishful Thinkers have finished college. Many have some college education (40%), but one third have a high-school degree or less (35%).
- Although only 10 percent of Wishful Thinkers are students, they are more likely than all other segments to be still in school. One in five (22%) works in a technical, sales, or administrative position. Wishful Thinkers are one of the least likely of the cluster groups to hold executive- or manager-level positions.
- Given their young age, it is not surprising that Wishful Thinkers have one of the lowest average annual household incomes compared to the other segments (\$53,380). Over half (54%) have household incomes below \$50,000 per year.
- Since a large portion of Wishful Thinkers is under age 35, it follows that 37 percent are in the young couples or young parents lifestages. One in five Wishful Thinkers is in the middle parents lifestage.
- Nearly one in five (19%) lives in the South Atlantic region, and 18 percent live in the East North Central region.
- Wishful Thinkers are more likely than most other segments to live in small towns or rural areas. One in three (34%) lives in a large urban area.

Wishful Thinkers

- 22.3 million adults
- 32 years average age; 65% Generation Y/X
- \$53,380 average HH income; 23% \$75K+
- 50% have kids in household
- 81% work full/part-time
- 3% are retired
- 26% Older Parents, 24% Young Parents, 19% Middle Parents
- 3.9 average no. of past-year trips
- 3.3 average no. of past-year leisure trips
- 40% are past-year business travelers
- 42% are past-year air travelers
- 24% traveled internationally in past 3 years

Travel Profile

- Wishful Thinkers take the fewest trips of all segments, averaging only 3.9 trips in the past year. Most (67%) traveled only one to four times in the past year.

- Three in four Wishful Thinkers (76%) have not traveled outside the United States in the past three years.
- Like the other segments, the majority of Wishful Thinkers who travel for leisure have taken only one to four leisure trips in the past year, or 3.3 trips on average (71%).
- Only 40 percent of Wishful Thinkers have taken one or more business trips in the past year. Those who did travel for business tend to be infrequent business travelers taking an average of one business trip in the past year.

Given their low propensity for travel, especially business travel, it is not surprising that only 42 percent of Wishful Thinkers have taken an air trip in the past year.

Geotourism Profile

- Wishful Thinkers are the least well traveled of all eight segments but this may be related more to their youth and competing demands on their time and money than to their basic interest in, or subsequent lack of, travel. They are, in fact, among the most likely to say that travel is the natural right of all people (75%), and to say they would travel more if they had more money (91%) or had more time (78%).

Attributes of Travel:

Wishful Thinkers are most interested in outdoor-related travel and show above-average interest in the following:

- 48% like outdoor adventure travel that involves challenge, risk and excitement
- 46% like travel to remote locales
- 42% like trips to go hunting and fishing
- 35% like primitive travel in the wilderness
- They are also, however, above-average in their interest in trips to large cities (54%), high quality accommodations with excellent facilities and fine dining (54%), and luxury and being pampered (45%).

Distinguishing Characteristics:

- Wishful Thinkers are the most likely to want to be very active and busy when they travel (54%). They report higher levels of interest than any other group in destinations heard about from family and friends (80%); destinations they can talk about when they get home (78%); and destinations offering many forms of entertainment such as nightlife, dining, shows and casinos (73%). Having fun and being entertained (88%) or finding thrills and excitement (76%) when they travel, and visiting destinations viewed as exotic (50%) are all very important to Wishful Thinkers when they travel.
- Wishful Thinkers are generally quite average in their views about tourism. An above-average share, however, feels that tourism increases traffic congestion and overcrowding (69%) and causes prices of local goods and services to rise (50%).

Attitudes and Behavior:

- Perhaps reflecting their younger age and busier, demanding lives, Wishful Thinkers tend to be much less civic-minded than other groups. They are well-below average in their tendency to vote in national elections (39%), read a daily newspaper (35%), attend religious services (20%), participate in civic organizations (3%), or write to politicians or companies about concerns about

their environmental or business practices (3%). They are also among the least likely to donate time or money to a number of different types of organizations.

- Wishful Thinkers are also much less likely than average to visit historic sites or museums (16%), visit art museums or galleries (8%) or to attend performing arts events (6%) in their local areas. They are also well below average on their tendency to take educational classes or attend seminars and lectures (12%). They also show below-average pro-environmental at-home behaviors such as recycling bottles, cans or newspapers (54%); buying from particular companies because they donate to charities (17%) or because of their efforts to preserve the environment (15%); or buying environmentally-safe household products, even if they cost more (15%).

Apathetics

Demographic Profile

- Apathetics are equally likely to be men or women.
- Half of women are baby boomers (48%); one third of men are age 55 or over (33%).
- One quarter of Apathetics are young adults under the age of 35.
- 29 percent of Apathetics hold high school degrees or less. However, over one in three (37%) has a college degree.
- One in five Apathetics (21%) holds a professional/specialty position; 17 percent work in technical, sales, or administrative jobs. Homemakers make up 14 percent of Apathetics.
- Although slightly more affluent than Wishful Thinkers, 40 percent of Apathetics have annual household incomes under \$50,000. One in four Apathetics has an annual income between \$50,000 and \$75,000.
- Since many Apathetics have children at home, over half (53%) are in the young, middle, or older parent lifestages. Some are working older couples (15%) or retired older couples (12%).
- One in five (19%) lives in the East North Central region.
- Many Apathetics (42%) live in large cities or urban areas, but one quarter live in mid-size cities of 500,000 to 2 million in population.

Apathetic

- 19.9 million adults
- 46 years average age; 44% Baby Boomers
- \$64,130 average HH income; 33% \$75K+
- 42% have kids in household
- 67% work full/part-time
- 17% are retired
- 23% Older Parents, 17% Young Parents, 15% Working Older Couples
- 4.6 average no. of past-year trips
- 3.4 average no. of past-year leisure trips
- 50% are past-year business travelers
- 50% are past-year air travelers
- 18% traveled internationally in past 3 years

Travel Profile

- Apathetics travel slightly more than Traditionals and Wishful Thinkers, taking an average of 4.6 trips in the past year.
- Most (82%) Apathetics have not taken an international trip in the past three years.

- Most Apathetics who travel for leisure have taken only one to four leisure trips in the past year (68%).
- Half of Apathetics (50%) have taken one or more business trips in the past year. Those who travel for business tend to be infrequent business travelers taking an average of 1.7 business trips in the past year.
- Half (50%) of Apathetics have also traveled by air in the past year.

Geotourism Profile

- Apathetics are quite similar to Wishful Thinkers in a number of their behaviors and attitudes. They are, however, an older group, and are slightly more frequent travelers than are Wishful Thinkers. In other ways, however, they are similar to the Traditionals. Apathetics tend to be well-below average on most of the items asked about in the study.

Attributes of Travel:

Apathetics share some basic conservatism in their travel choices with Traditionals and Wishful Thinkers. When they travel, they seek the following:

- 89% want high levels of cleanliness
- 83% want high levels of safety and security
- 65% want no surprises
- 62% want many forms of entertainment at their destinations, such as nightlife, fine dining, shows, and casinos
- 51% say they don't eat unfamiliar foods when traveling

Distinguishing Characteristics:

- Apathetics share with Traditionals the lowest level of interest of all groups in outdoor-related travel. Less than 10 percent of Apathetics are likely to take trips to go hunting and fishing (9%), outdoor adventure trips (8%), travel to remote locales (5%), or primitive travel (1%).
- Further, they show little interest in including cultural or social elements in their trips. Apathetics, for example, are the least likely of all eight segments to think travel is important for the education it provides to themselves and their families (27%). They are also the least likely to want to see and learn about the places they visit (19%); nor are they likely to use small-scale accommodations run by local people (17%); nor want to experience people, lifestyles and cultures very different from their own (15%); nor visit destinations with authentic historic or archeological sites (12%).

Attitudes and Behavior:

- Apathetics are like Traditionals and Good Citizens in some of their at-home activities. They are above average in reading a daily newspaper (76%) and in attending religious services (55%).
- They are, however, well-below average and more like Wishful Thinkers in their tendencies to not be involved in activities in their local areas related to environmental, cultural or arts-related learning, preservation, or protection.
- Apathetics are much less likely than average to visit historic sites or museums (15%), visit art museums or galleries (8%), or to attend performing arts events (14%) in their local areas. They are also well below average in their tendency to take educational classes or attend seminars and lectures (12%). They are also less oriented than other groups in environmental behaviors at home

such as recycling bottles, cans or newspapers (58%); buying environmentally-safe household products, even if they cost more (22%); or supporting particular companies because they donate to charities (19%) or because of their efforts to preserve the environment (18%).

Outdoor Sportsmen

Demographic Profile

- Outdoor Sportsmen are more likely to be men (61%) compared to all other segments.
- Over half of men in this segment are baby boomers age 35-54 (58%); 15 percent are age 55 or older.
- Nearly half of the women in this cluster group are baby boomers (48%).
- Outdoor Sportsmen are not as educated as the other segments. Along with Traditionals, they are the least likely to have a college degree (31%), although one third (34%) say they have some college.
- Very few Outdoor Sportsmen have executive/managerial occupations. One third (32%) have professional/specialty or technical/sales positions. Outdoor Sportsmen are more likely than all other groups to include farmers, although they make up only four percent of this segment. Homemakers make up 14 percent.
- Over half (55%) of Outdoor Sportsmen have annual household incomes under \$50,000. One in five (22%) has an income under \$25,000 per year, similar to Traditionals and Wishful Thinkers.
- Most Outdoor Sportsmen (69%) are in the “parents” lifestage, similar to Wishful Thinkers. One in four (25%) Outdoor Sportsmen is in the older parents lifestage, not surprising given that many of them are baby boomers.
- Nearly one fifth (19%) live in the East North Central region. Pacific and South Atlantic residents make up 14 percent each of this segment.
- Outdoor Sportsmen are more likely than all other segments to live in small towns or rural areas (32%). Another one third (33%) live in large urban areas.

Outdoor Sportsmen

- 21.0 million adults
- 41 years average age; 54% Baby Boomers
- \$54,040 average HH income; 23% \$75K+
- 58% have kids in household
- 74% work full/part-time
- 10% are retired
- 25% Older Parent, 24% Young Parents, 20% Middle Parents
- 5.0 average no. of past-year trips
- 3.6 average no. of past-year leisure trips
- 41% are past-year business travelers
- 30% are past-year air travelers
- 14% traveled internationally in past 3 years

Travel Profile

- Outdoor Sportsmen take five trips per year on average. Two-thirds (64%) are infrequent travelers.
- Of all segments, Outdoor Sportsmen are the least likely to have taken an international trip in the past three years (14%).
- Most (69%) Outdoor Sportsmen travel one to four times per year for leisure, taking 3.6 leisure trips on average.

- Along with Wishful Thinkers, Outdoor Sportsmen are the least likely to be business travelers. Just 41 percent have taken at least one business trip in the past year.
- Most (70%) Outdoor Sportsmen have not taken a trip by air in the past year.

Geotourism Profile

- Outdoor Sportsmen, a group dominated by men, like to travel. More than 92 percent say they would travel more if they had more money and 75 percent would travel more if they had more time. Their travel preferences revolve around the outdoors.

Attributes of Travel:

Outdoor Sportsmen report above-average preferences for the following:

- 71% like trips to small towns, rural areas, or the countryside
- 39% like primitive travel into the wilderness
- 39% like travel to remote locales
- 35% like outdoor adventure travel involving challenge, risk, and excitement
- Over 64 percent say they are very or extremely likely to take trips to hunt or fish, the highest percentage of any of the eight groups. And, a well-above average 52 percent of Outdoor Sportsmen participate in outdoor recreation activities in their local areas.

Distinguishing Characteristics:

- A clean, unpolluted environment is important to most Outdoor Sportsmen when they travel (80%). Outdoor Sportsmen are more concerned than most others that there are fewer unspoiled destinations than there used to be (64%) and about the traffic congestion and overcrowding that tourism can generate (64%).
- Despite this orientation to the outdoors, however, Outdoor Sportsman are the least likely to be willing to pay a premium to visit places that control the number of people entering (12%). They are also below average in their tendency to select travel companies based on their environmental or social policies (8%), to buy from companies they know make an effort to preserve the environment (21%), or to volunteer for (7%) or donate money to (9%) nature or environmental organizations. They are also generally only average or below average on sustainable environmental practices at home.
- Outdoor Sportsmen report the lowest interest of all eight segments in having high quality accommodations with excellent facilities and fine dining when they travel (15%), trips to large cities (12%), and international travel (1%). They share with Apathetics the lowest degree of interest in travel to destinations where the people do not speak English (4%).

Attitudes and Behavior:

- Outdoor Sportsmen show less interest in social, cultural and arts-related activities either at home or when traveling than do groups such as Geo-Savvys, Urban Sophisticates or Good Citizens, but more interest than do Apathetics or Wishful Thinkers.
- At home, Outdoor Sportsmen are least likely of all the groups to like fine dining in their local area (29%) or to attend performing arts events (7%). They also report the lowest readership levels of travel magazines (6%) and historic and arts-related publications (2%).

Self-Indulgents

Demographic Profile

- Self-Indulgents are equally likely to be women (50%) or men (50%).
- Over half of men in this segment are baby boomers age 35-54 (52%). Nearly half of women are baby boomers (46%). Self-Indulgents women are more likely than women in the Good Citizens, Urban Sophisticates, Geo-Savvys, Traditionals, and Apathetics segments to be Generation X and Y'ers age 18-34 (40%).
- Over half (57%) are college educated, with 17 percent of Self-Indulgents having a graduate degree.
- Sixteen percent have executive/managerial occupations and 29 percent have professional/specialty occupations, similar to Good Citizens. Nearly one in five (19%) has a technical, sales, or administrative position. Homemakers and students together make up 16 percent of Self-Indulgents.
- Self-Indulgents have a relatively high average annual household income (\$68,810), with 38 percent having annual household incomes above \$75,000.
- As many Self Indulgents are baby boomers, many (61%) are in the “parents” lifestages. In fact, 35 percent are young or middle-age parents.
- One in five (20%) lives in a South Atlantic state; 16 percent live in the Pacific region. Self-Indulgents are more likely to live in the East South Central region compared to Good Citizens, Urban Sophisticates, and Geo-Savvys.
- About (46%) live in medium-sized cities between 100,000 and 2 million in population; in fact Self-Indulgents are more likely to live in smaller cities of 100,000 to under 500,000 population than Good Citizens, Urban Sophisticates, Geo-Savvys, Traditionals, and Wishful Thinkers. Forty percent live in large urban areas.

Self-Indulgents

- 19.9 million adults
- 43 years average age; 49% Baby Boomers
- \$68,810 average HH income; 38% \$75K+
- 47% have kids in household
- 78% work full/part-time
- 9% are retired
- 26% Older Parents, 22% Young Parents
- 5.7 average no. of past-year trips
- 4.1 average no. of past-year leisure trips
- 53% are past-year business travelers
- 58% are past-year air travelers
- 37% traveled internationally in past 3 years

Travel Profile

- Self-Indulgents take 5.7 trips per year on average, but just over half (52%) are infrequent travelers, taking one to four trips in the past year.
- One in three (37%) has traveled internationally at least once in the past three years, a relatively high incidence compared to Outdoor Sportsmen, Traditionals, Apathetics, and Wishful Thinkers. Self-Indulgents are not as well traveled as Urban Sophisticates and Geo-Savvys, as only 9 percent have taken three or more international trips in the past three years.
- Most (63%) Self-Indulgents are infrequent leisure travelers; yet along with Self-Indulgents, Urban Sophisticates, and Geo-Savvys, Self-Indulgents have a relatively high average annual number of leisure trips (4.1).

- Along with Good Citizens, Urban Sophisticates, and Geo-Savvys, Self-Indulgents have a high tendency toward business travel. More than half (53%) take at least one business trip per year.
- Given their propensity to travel for both leisure and business, it is not surprising that over half (58%) of Self-Indulgents have taken at least one trip by air in the past year.
- Overall, Self-Indulgents' travel profile is most similar to that of Good Citizens.

Geotourism Profile

- Self-Indulgents are similar to Geo-Savvys and Urban Sophisticates in their demographic profile but are very different in their Geotourism profile.

Attributes of Travel:

Self-Indulgents are the most likely of all the groups to do the following when they travel:

- 70% use high quality accommodations with fine dining and excellent facilities
- 65% visit large cities
- 53% value luxury and pampering
- They are the most likely of all the groups to look to family/friends to recommend destinations (77%). Similar to Wishful Thinkers, they want to have fun and be entertained when they travel (82%). Most Self-Indulgents see travel as a way to get away from the demands of home and work (91%).

Distinguishing Characteristics:

- Self-Indulgents, however, tend to be below average in their interest in culturally or environmentally-oriented travel and community-based activities. But what really distinguishes them is their general lack of cultural and environmental awareness and sensitivity and, in some cases even, their negative cultural and environmental attitudes.
- Self-Indulgents are the least likely of all the segments to be concerned that their visits not damage the environment (53%). They are the least likely to be concerned about sprawling development (37%) and to say they would do more for the environment if they knew of specific actions they could take (21%). They are also the least likely of all the groups to support controlling access to National Parks and public lands (36%) or to historic sites (33%), in order to preserve and protect them. They are also less likely than any of the other eight segments to believe that there should be more careful regulation of National Parks and public lands (32%).

Attitudes and Behavior:

- On the other hand, Self-Indulgents are the most likely of all the groups to say that plants and animals exist primarily to be used by people (38%) and that people should have unlimited freedom to modify the natural environment to suit their needs (15%). And, they are much less likely than most other groups to subscribe to nature/environmental (5%) or cultural (4%) publications, or to belong to environmental, development or human rights groups (4%).
- Self-Indulgents are the least likely of all the segments to select travel companies based on their commitments to employ local people and support local communities (16%) or on their social or environmental policies (4%). They are also the least likely to buy from companies who donate part of their proceeds to charity (14%), to buy environmentally safe household products (12%), or to buy from companies that make an effort to preserve the environment (10%). Self-Indulgents are

also the least likely to donate money to (4%) or volunteer for (3%) nature or environmental organizations, and the least likely to support more funding for historic preservation (35%).

Methodology

NFO Research, the largest and most reputable consumer household panel research company in the United States, collected data for The Geotourism Study for *National Geographic Traveler* and the Travel Industry Association of America. The study was conducted with adults 18 years of age and older among a representative sample of U.S. households. The study sample consisted of 8,000 adults, and was balanced to represent the national demographics of American adults.

A total of 4,300 questionnaires were returned for a response rate of 54 percent. Results from returned surveys were re-balanced to reflect the demographic profile of U.S. adults. Among these, a total of 3,300 qualified as past three-year travelers, meaning they had taken at least one trip in the past three years. As in other TIA studies, a “trip” was defined as travel 50 miles or more one-way, away from home, and/or including one night or more away from home, not including commuting or operating a commercial vehicle. Results from this traveler sample were then projected to the entire U.S. adult population and have a statistical error range of +/- 2 percentage points.

This is the first phase of a two-phase study. The second phase of this study, which will be conducted later this year, will re-survey qualified respondents to collect additional detail about their travel behavior, preferences, and expectations of the different areas of the industry (such as hotel/resort companies, cruise lines, airlines, destination marketing groups, etc.); their opinions about travel companies; as well as their interest in and willingness to pay for more culturally and environmentally-sensitive facilities and services.