Geotourism:

The New Trend In Travel

Prepared by
Travel Industry Association of America

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INTRODUCTION

As the travel industry looks for new ways to satisfy increasing demands of consumers in faster, more efficient, and value-driven ways, it is critical to understand the expectations and desires of our customers. What we have known since the inception of the "industry" is that *travelers* crave and expect authentic experiences when they journey away from home. In many aspects they want to recreate the comforts of home – yet somehow want to return from a trip renewed or changed in some way.

"Sustainable tourism" is a concept that has been part of the travel industry for a number of years. Encouragement of sustainable tourism typically has been directed inward toward travel suppliers and destinations. Then, the widely-remembered concept of eco-tourism was presented to consumers in the form of actual tourism products (i.e. eco-tours). The concept of geotourism builds upon sustainability efforts of the past, yet offers the travel industry an outward-facing, consumer-driven approach to tourism product development and destination management.

Geotourism, a term created by Jonathan Tourtellot, Senior Editor of *National Geographic Traveler* and head of the tourism institute at the National Geographic Society, encompasses all aspects of travel – not just the environment. Its definition—tourism that sustains or enhances the geographical character of the place being visited, including its environment, culture, aesthetics, heritage and the well-being of its residents—describes completely all aspects of sustainability in travel, and hits all of the definable touch points associated with providing the authentic travel experiences that travelers demand today.

Geotourism: The New Trend in Travel presents the results of a large, two-phase consumer study on travelers' environmental and cultural attitudes and behaviors. Phase I of the study segmented American travelers into eight distinct market segments based on the following: consumers' general attitudes about traveling for leisure; their travel preferences; their civic, environmental, and culturally-oriented practices in the local area; membership in various affinity groups; and their attitudes about tourism's impact on the local area. The Phase I study found that three of these segments, representing over 55 million American travelers, are inclined to exhibit geotourism attitudes and behaviors. These "geotourists" seek culture and unique experiences when they travel. They are also quite conscious of the environment, both at home and while traveling.

Phase II of the study followed up with Phase I respondents to explore consumer awareness of travel companies' various environmental and cultural practices. The results of this phase show that awareness of such practices among American vacationers is relatively low. Still, millions of travelers, most of them "geotourists", are aware of and have used companies that practice sustainable tourism. These travelers are also poised to support the travel industry's geotourism efforts with their travel dollars. Many of them would be willing to pay a premium for travel services from companies that engage in geotourism practices.

Geotourism is an emerging trend that will endure. Sustaining the local environment or bringing in a bit of the local color can mean the difference between a discounted rate or a higher rate, can develop increased seasonal traffic, and spur local tourism. At the heart of this effort is the National Geographic Society's mission: to increase and diffuse geographic knowledge. At *National Geographic Traveler* we are a conduit of this mission and have committed in every issue to report on destinations of distinction and character and support efforts to keep them that way. These are the keys that unlock the doors to the future of travel.

Dawn Drew
Vice President & Publisher
National Geographic Society

2003 Treasurer, Board of Directors
Travel Industry Association of America

EXECUTIVE SUMMARY

Geotourism: The New Trend in Travel 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. This unique study gives the travel industry insight into future consumer expectations of travel suppliers.

Traveler Attitudes Toward Tourism and the Environment

A majority of American travelers feel that travel is the natural right of all people and more than one third believe that travel promotes world peace and understanding. The vast majority of American travelers enjoy traveling within the United States, with 89 percent saying there are many destinations in this country that appeal to them. Less than ten percent say they prefer to travel internationally over traveling in the U.S.

Nearly three quarters of all travelers claim that it is important to them that their visit not damage the environment. This is not surprising, since most travelers (73%) place a high importance on a clean, unpolluted environment when they take a leisure trip. Most American travelers (80%) highly value outstanding scenery as well. Authenticity is also important to travelers. Many (61%) believe their experience is better when their destination preserves its natural, historic, and cultural sites.

The majority of travelers are ready to act to preserve and protect our natural sites. Nearly 91 million travelers (59%) support controlling access to and/or more careful regulation of National Parks and public lands in order to help preserve and protect the environment. Sizeable shares of U.S. travelers are interested in helping to preserve and protect the environment if such efforts can conveniently fit it into their daily lives (40%) and/or say they would do more for the environment if they knew specific actions to take (37%). In addition, 27.7 million travelers (18%) would pay a premium to visit sites that control the number of people entering.

The majority of American travelers show some concern for and sensitivity about the environment in general. Most travelers believe that people must live in harmony with nature in order to survive (71%). While a good portion of travelers carry this attitude with them when they travel, it also reflected while at home. For example, the majority of travelers say that they make an effort to be sensitive to environmental concerns by recycling, trying to conserve electricity and water at home. Just under half of all travelers report that they buy more energy efficient appliances even if they cost more and 30 percent buy environmentally safe household products.

When the travel dollars of these environmentally-oriented consumers are aggregated on a per capita basis, this group of American travelers can have a huge, positive impact on travel industry revenues. About 43 million American travelers (28%) say they generally buy products and services from specific companies that make an effort to preserve and protect the environment. Yet when it comes to *travel* companies, the standard is a bit higher. Even more travelers (54 million) are inclined to select travel companies that strive to protect and preserve the local environment of the destination. For a smaller group of travelers (11%), the environment is top of mind when actually making decisions about which travel companies to patronize.

Traveler Attitudes Toward Tourism and Cultural Heritage

More than half of the traveling American public consider it important to experience or learn about cultures other than their own when they travel. Over 95 million (62%) believe it is important to learn about other cultures when they travel. Half of all travelers (50%) express a similar sentiment that it is important to learn about people with ethnic heritages different from their own. For example, 89 million (58%) view travel as an opportunity to try local foods or cuisine, and 54 percent say that it gives them the chance to explore off the beaten path hotels and places frequented by locals.

Authenticity is a primary theme when examining travelers wants and needs. Four in ten (41%) travelers say their experience is better when they can see and do something authentic. In addition, half of all travelers prefer to experience the local culture (49%) and support local businesses (49%) at their destinations.

Travelers' positive attitudes about culture and history extend to the activities they choose to do at home and while traveling. Furthermore, one-half (50%) of all travelers say they eat in ethnic/specialty restaurants in their local area, and nearly as many attend community festivals and ethnic celebrations (45%). Many (44%) like to read books/magazines or watch movies/videos about history and culture. Four in ten travelers (40%) say they visit historic sites and museums in their local areas. Over one quarter of all travelers attend performing arts events (28%) and/or visit art museums/galleries (26%) in their local areas.

Nearly half of all travelers support controlling access to historic sites so that they may be preserved and protected. Significantly large numbers of American travelers are interested in history and culture, as reflected in their beliefs and local area activities. For example, the majority of American travelers believe that it is important that future generations know and pass on our nation's history (85%). Many travelers (54%) support additional funding for the preservation of historic sites and monuments, while 38 percent support additional funding for the cultural/visual performing arts. Also, 48 percent of travelers support controlling access to historic sites so that these sites could be preserved and protected.

Millions of American travelers will buy from companies and organizations that are culturally and socially oriented. Nearly one third (30%), or 46 million travelers, buy from specific companies because they know that these businesses donate part of their proceeds to charities. Twenty-two percent say they make monetary donations to historic/cultural/education organizations and 16 percent volunteer to work for such organizations at home. When it comes to tourism, one in three (34%) travelers support travel companies that strive to protect and preserve the history and culture of destinations. For about one third of travelers (31%, or 47.7 million) say it is important that the travel companies they use employ local people and support local communities.

Awareness and Influence of Travel Companies' Geotourism Efforts

One in every three travelers say they are influenced by the actions travel companies take to protect the environment and/or sustain local culture. When cost or price is not a consideration, it is not surprising that most American travelers think quality of service and convenience have the strongest influence on which travel companies they choose to use. Still, one third of all travelers are influenced by a travel company's actions to preserve the environment and/or history and culture of destinations. This indicates that travel companies' geotourism efforts do get noticed by a good portion of travelers.

Many travelers are willing to pay more for travel products and services from companies that strive to protect the environment. Although most travelers are concerned with price and value, 58.5 million (38%) say they would pay more to use a travel company that strives to protect and preserve the environment. Most important, the majority (61%) of those who would pay more to use such companies would in fact pay five to ten percent more.

Still, travel companies may be able to do more to make their customers aware of their efforts to protect and preserve the environment. Only about half of all travelers are aware of at least one practice employed by travel companies to preserve and protect the environment of destinations. Travelers are most often aware of companies that ask customers to reuse towels/sheets (36%) and those that use energy saving practices (30%). About one in five travelers (21%) are aware of travel companies that recycle and/or that use local vegetation on property grounds. Overall, few travelers are aware of any travel companies that publicly display their environmental practices or that educates customers on how to protect the local environment during their stay.

Millions of travelers are willing to pay between 5 and 10 percent more to support companies that protect and preserve culture and history. Nearly four in ten travelers (39%) say they would choose a travel company that preserves and protects the history and culture of destinations, even if it costs more. This equates to 58 million travelers who would pay more to use companies that preserve the history and culture of destinations—about the same number of travelers who would pay more for companies that preserve and protect the environment of destinations. Among those who would pay more, a majority (67%) would pay at least five percent more to use companies that preserve and protect the history and culture of destinations.

Over half of all travelers (56%) say they are aware of travel companies that strive to protect and preserve the history and culture of destinations. Practices such as using décor that reflects the local culture and offering local cuisine seem to be the most visible, as four in ten travelers are aware of companies that do each. About one third of travelers are aware of travel firms that offer a way to purchase tickets to local performances or special events (35%) and/or offer guided heritage/cultural tours (31%). For many of these travelers, awareness of a firm's historic/cultural preservation efforts translates into usage.

The Geotourists—who they are and how they travel

There are at least 55.1 million Americans who can be classified as "sustainable tourists" or "Geotourists". The travel habits of three Geotourist segments—Geo-savvys, Urban Sophisticates, and Good Citizens—are guided by a 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. These groups are demographically different, but all have strong geotourism inclinations.

Geo-savvys are young, well-educated, and environmentally aware travelers. One in four Geo-savvys is under age 35, giving this market segment an adventurous flair. Half of Geo-savvys live in large cities, and one in four lives in the Pacific region. Many Geo-savvys are affluent, although most young Geo-savvys have not yet reached the peak earning years. When it comes to travel, Geo-savvys show a distinct preference for destinations with authentic historic sites, different cultures, and educational experiences. Of all the geotourism segments, Geo-savvys are most likely to be aware of travel companies' practices to preserve the environment of destinations. Along with Urban Sophisticates, Geo-savvys have the highest proportion of travelers (50%) who would use a travel company that preserves and protects the environment, even if they had to pay more.

Urban Sophisticates are the most affluent travelers with strong preferences for the cultural and social aspects of travel. This segment's affluence is reflected in its demographic profile. These travelers are highly educated and are the most likely to hold executive, managerial, or professional occupations. Over half (56%) of Urban Sophisticates live in large urban areas and one in five lives in second-tier cities. Not surprisingly, Urban Sophisticates' affluence and cultural affinity have a strong effect on their travel preferences. The majority of Urban Sophisticates (67%) prefer high quality accommodations with excellent facilities and fine dining. They also tend to seek destinations that offer authentic historic sites (73%) and cultural/arts events or attractions (74%). Most Urban Sophisticates prefer trips where they can explore historic and charming towns and locations (86%). Extensive travel experience makes these travelers highly aware of what travel companies do to preserve the history and culture of destinations. Of all the segments, Urban Sophisticates are the most willing to pay more to use a travel company that preserves the history and culture of destinations.

Good Citizens, while older and less sophisticated, are socially-conscious travelers. Good Citizens' demographic profile reflects an older, but wiser set with an element of affluence. Along with Urban Sophisticates and Geo Savvys, Good Citizens are well educated. Four in ten Good Citizens (41%) have annual household incomes above $75,000. What distinguishes Good Citizens is a heightened level of cultural and environmental awareness in their everyday lives. Good Citizens are more likely than any other group to make donations to historic, cultural and educational organizations. 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%). When it comes to travel, Good Citizens are likely to carry this affinity with them. Many Good Citizens (70%) support controlling access to National Parks and other public lands in order to better preserve them. A majority believe that there should be more careful regulation of National Parks and public lands (67%). Many Good Citizens are willing to choose a travel firm that protects and preserves the environment and cultural heritage of destinations, even if it costs more. Yet compared to Geo-savvys and Urban Sophisticates, Good Citizens would not pay as much of a premium to use such travel companies.

OVERVIEW OF AMERICAN TRAVELERS

This study measures the attitudes, behaviors and awareness of the general traveling public in the United States of America, which makes up a total of 154 million adults. These adults can be described as "travelers" – having taken at least one trip of 50 miles or more one way, away from home, and/or including one or more nights spent away from home within the past three years. Most American travelers (94%, or 144 million) have traveled within the past year, one third (34%, or 49 million) of whom are frequent travelers taking five or more past-year trips. According to the TIA report *Expenditure Patterns of Travelers in the U.S., 2002 Edition*, American travelers spent $488.2 billion in the U.S. in 2000. Most of that spending was by overnight travelers, who generated $476 billion in domestic travel expenditures that year.

It is very important to note that the behaviors of travelers vary greatly based on age, household income, and education level. Other demographic characteristics, such as life stage and gender, also have an effect on the frequency of travel as well as preferred type of travel. In many instances, smaller niche markets or demographic segments of travelers generate higher travel expenditures than the sizes of these markets would suggest.

Demographics of American Travelers

Over four in ten travelers (43%) are Baby Boomers ages 35-54, who generated the largest portion of travel expenditures in 2000 ($230.9 billion). Nearly one third (30%) are Generation X and Generation Y travelers ages 18-34. This group generated $126.7 billion in domestic travel spending in 2000. About one in four travelers (27%) are Mature travelers ages 55 or older. Mature travelers generated $130.6 billion in domestic travel spending in 2000. The average age of travelers is 45, reflecting the large size of the Baby Boomer segment.

Most adult travelers are married (73%) and 41 percent have children under 18 living at home. Those in the "Parents" life stage comprise the greatest percentage of travelers at 54 percent. "Couples" who have no children in the home, make up 33 percent of the total. Travelers in the "Singles" life stage comprise 12 percent of travelers.

Nearly half of all American travelers (45%) have at least a college education, most (69%) work full or part-time, while 16 percent report they are retired. Their above-average levels of education result in above-average incomes, averaging $63,200 on a household level. In fact, 37 percent of all travelers are employed in executive/managerial or professional occupations.

Generally reflecting the distribution of the U.S. population, the South Atlantic (18%), East North Central (17%), Pacific (16%) and Middle Atlantic (14%) Census divisions are home to most travelers. The majority of travelers (65%) reside in large population centers with 500,000 or more residents.

Demand for Travel Products and Services

American travelers—those who have taken a trip at least once in the past three years—are most likely to travel for pleasure purposes at least once a year. The majority are infrequent pleasure travelers taking one to four pleasure trips in the past year (67%), while 23 percent are frequent pleasure travelers taking five or more past-year leisure trips. Only 32 percent of travelers traveled for business purposes in the past year, and those who did tended to take only one to four business trips.

Most travelers have used paid lodging in the past year (84%). Again, most do so infrequently, just one to four times a year. Still, these travelers are staying in a wide range of lodging types. For example, travelers are most likely to say they have stayed in moderately-priced hotels/motels in the past three years (66%). Yet 48 percent say they have used budget hotels and 41 percent say they have used expensive hotels. Just over one in ten (14%) travelers say they have stayed at a luxury hotel in the past three years. Rental homes or condos are used by one in five travelers (21%).

While over half of travelers (53%) have taken at least one trip by air in the past year, personal car or truck is the most often-used mode of transportation on trips.

TRAVELER CHARACTERISTICS
Table 1

TRAVELER CHARACTERISTICS Base = millions of U.S. adults	Total Travelers 154.0
Travel Frequency-Past 3 Years	
1-4 trips	36%
5+ trips	64%
Avg. no. of trips (excl. 0)	11.7
1+ trips outside the U.S.	29%
Travel Frequency Past Year	
No trips in past year	6%
1-4 trips	60%
5+ trips	34%
Avg. no. of trips (excl. 0)	5.7
Pleasure Travel Frequency Past Year	
No pleasure trips in past year	10%
1-4 pleasure trips	67%
5+ pleasure trips	23%
Avg. no. of pleasure trips (excl. 0)	4.3
Business Travel Frequency Past Year	
No business trips in past year	68%
1-4 business trips	25%
5+ business trips	7%
Avg. no. of business trips (excl. 0)	4.5
Air Travel Frequency Past Year	
No trips by air in the past year	47%
1-4 air trips	46%
5+ air trips	7%
Avg. no. of air trips (excl. 0)	3.1
Paid Lodging Use in Past Year	
No paid lodging trips in the past year	16%
1-4 paid lodging trips	66%
5+ paid lodging trips	18%
Avg. no. of paid lodging trips (excl. 0)	3.8
Type of Paid Lodging Used in Past Three Years On Pleasure Trips*	
Luxury hotel on pleasure trip	14%
Expensive hotel on pleasure trip	41%
Moderate hotel on pleasure trip	66%
Budget hotel on pleasure trip	48%
Rental condo/home on pleasure trip	21%
Bed & breakfast on pleasure trip	12%
Owned condo/home on pleasure trip	11%
Cruise	13%
Transportation Used in Past Year On Pleasure Trips*	
Personal Car/Truck	63%
Coach Class Air	32%
Rental Car	17%
Motorcoach/Bus	6%
Business Class Air	2%
First Class Air	3%
Inter-City Train	3%
RV	3%
*Multiple responses allowed. *Source: Travel Industry Association of America*	

Travelers' Attitudes About Travel

It is obvious that traveling for leisure is important to all American travelers. Over 60 percent feel that travel is the natural right of all people and more than one third (37%) believe that travel promotes world peace and understanding. Eighty-five percent claim that they would travel more if they had more money. Two in three travelers (68%) say they would travel more if they had more time, and many (39%) report that they regularly save money to travel. The vast majority of Americans (89%) say there are many destinations in this country that appeal to them. Comparatively few (8%) say they prefer to travel internationally over traveling in the U.S.

Many travelers seem concerned about destinations becoming overcrowded and losing their authenticity. Nearly three quarters (72%) of all travelers claim that it is important that their visit not damage the environment. Nearly as many (61%) believe their experience is better when their destination preserves its natural, historic, and cultural sites. Four in ten travelers (41%) say their experience is better when they can see and do something authentic.

For about one third (31%, or 47.7 million) of travelers it is important that the travel companies they use employ local people and support local communities. In addition, 27.7 million travelers (18%) would pay a premium to visit sites that control the number of people entering. About 17 million (11%) say they actually make decisions about travel companies to patronize based on their environmental or social policies.

Frequent travelers' attitudes are similar to those of the general traveling public, but there are a few exceptions. Not surprisingly, frequent travelers are more likely to say they regularly save money to travel (44% vs. 39%) and/or say they prefer to spend money on travel rather than on material goods (31% vs. 25%). Frequent travelers are also more likely than travelers in general to think that their favorite vacation spots are more crowded or "built-up" than they used to be (62% vs. 58%).

When examining traveler attitudes across the generations, several differences emerge. Generally, Mature travelers (age 55 or older) are more attuned to the enrichment aspects of the leisure travel experience. Mature travelers (67%) are more likely than Baby Boomer (52%) or Generation X (45%) travelers to think that the travel experience is better when they can learn as much as possible about the destination's customs, geography, and culture. Mature travelers are also more likely than younger travelers to believe their travel experience is better when they can see or do something authentic. In addition, Mature travelers (77%) are more likely than Baby Boomers (69%) or Generation X (70%) to feel that their visit should not damage the environment. Compared to younger travelers, Mature travelers are more likely to feel that it is important that the travel companies they use employ local residents and support the local community.

There are a few attitudinal differences by gender and income as well. For example, women are more likely than men to say that it is important that travel companies employ local residents and support the local community (33% vs. 29%). Those with higher annual household incomes ($75,000+) are more likely than travelers with lower incomes to believe that the U.S. offers many opportunities to experience its natural environment. Yet higher income travelers are also more likely to say that their favorite vacation spots are more crowded or built-up than they used to be.

General Attitudes About Traveling for Leisure*

	All Travelers	Frequent Travelers
Millions of American Adults =	154.0	49.0
The U.S. has many destinations that appeal to me	89%	91%
I would travel more if had more money	85%	82%
The U.S. has many opportunities to experience nature	81%	84%
It is important that my visit not damage environment	72%	74%
I would travel more if had more time	68%	69%
My experience is better when destination preserves natural/historic/cultural sites	61%	63%
Travel is a natural right of all people	61%	58%
I like to go to new places on each trip	58%	56%
My favorite vacation spots seem more crowded/built-up than they used to be	58%	62%
It bothers me when historic sites/natural areas are closed for repair	55%	56%
There are fewer unspoiled destinations than there used to be	55%	57%
My experience is better when I learn about destination's customs, geography and culture	54%	58%
My experience is better when I see/do something authentic	41%	43%
I save money regularly to travel	39%	44%
Travel promotes world peace/understanding	37%	37%
It is important to me that travel companies employ locals & support community	31%	33%
I prefer to spend money on travel rather than material goods	25%	31%
When I travel, I don't eat foods I am not accustomed to	25%	22%
I would pay a premium to visit sites that control the number of people entering	18%	20%
I make decisions on travel companies based on their environmental/social policies	11%	14%
I prefer to travel internationally rather than in U.S.	8%	8%

* *Results are top-two box (5/4) on a 5-point scale where 5=completely agree and 1=completely disagree.*

Importance of Leisure Travel Aspects

To a large number of travelers, many things are highly important when it comes to traveling for leisure. Some of these concerns can be considered almost universal across most demographic and life stage groups. Regardless of household size or income, most American travelers (91%) consider getting value for their travel dollar to be highly important. Not surprisingly, most travelers think leisure travel is an important way to get away from the demands of work and home (84%) and/or rest and relax (81%). Also, three in four travelers (76%) think it is important that they have fun and be entertained on their leisure trips. Most interesting is the fact that 112 million travelers (73%) place a high importance on a clean, unpolluted environment when they take a leisure trip. Nearly as many travelers place a high importance on safety and security while traveling (76%). When taking leisure trips, most American travelers (80%) also highly value outstanding scenery.

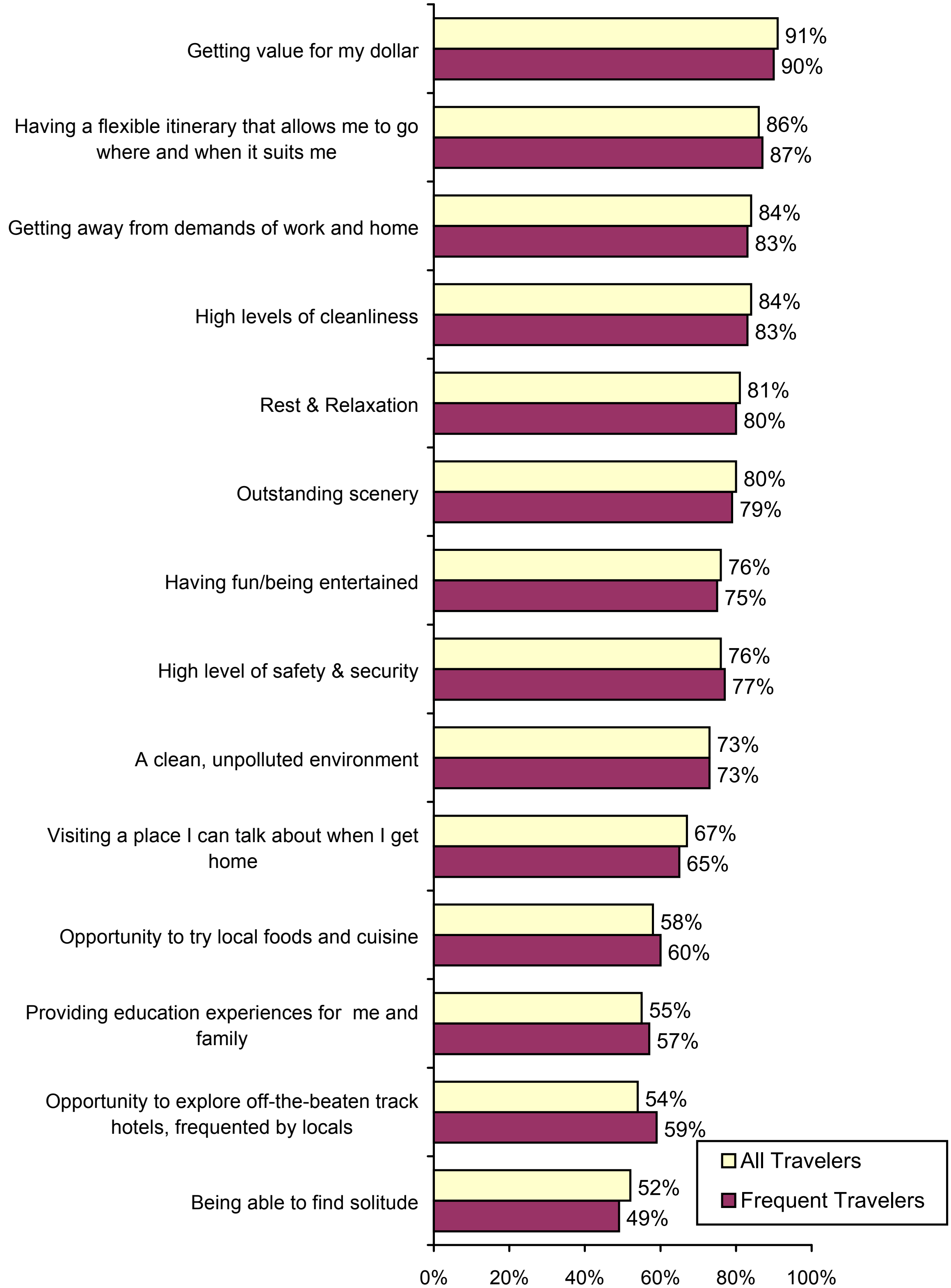
More than half of the traveling American public consider it important to experience or learn about cultures other than their own when they travel. For example, 58 percent (89 million) view travel as an opportunity to try local foods or cuisines, and 54 percent say that it gives them the chance to explore off the beaten path hotels and places frequented by locals. American travelers also want the freedom to make their own choices. Most travelers (86%) think flexible itineraries are highly important, reflecting the increasing independence of travelers in making travel arrangements.

While many of these could be regarded as key ingredients for a satisfying leisure trip, there are other more basic needs among travelers. For example, most travelers place high importance on cleanliness (84%). Interestingly, the majority of travelers also view travel as a status symbol. Two thirds (67%) of American travelers think it is important that they travel to a place they can talk about when they get home. In addition, over half (55%) feel it is important their leisure trips provide an educational experience for family members.

It is not surprising that young travelers ages 18-34 are more likely than older travelers to seek adventure and accomplishment when they travel. These Generation X and Y travelers are more likely than Baby Boomers or Matures to want to have fun and be entertained (86%) and find thrills and excitement (64%). Younger travelers are also more likely to feel it is important to visit places they can talk about when they get home (75%). On the other hand, Mature travelers ages 55 or older tend to seek learning and comfort. Matures are the least likely of the generations to travel for fun and entertainment (64%), but the most likely to want to learn about the destination's history, people, culture and geography (57%). While most Matures (79%) do want flexible travel itineraries, this is less important to them compared to Generations X and Y (90%) or Baby Boomers (88%).

The importance of safety and security while traveling differs by gender. Women (80%) are significantly more likely than men (72%) to feel safety and security while traveling is important. Women also have more cultural leanings. Women are much more likely than men to want to purchase locally-made handicrafts (52% vs. 38%) or experience a destination's music, art, dance, or crafts (42% vs. 31%).

What travelers think is most important when it comes to taking leisure trips…*



**Results are top-two boxes (5/4) on a 5-point scale where 5=extremely important and 1=not at all important.*

Destination and Trip Activity Preferences Among Travelers

Travelers today have more leisure destination choices available to them than ever. While travelers are more fragmented on the specific trip activities they prefer, they are fairly similar in what they generally seek when choosing a destination. For example, the majority of travelers (68%) say they are likely to take trips where they can experience the outdoors but still have comfortable accommodations. Yet only one in four travelers (25%) are likely to include outdoor activities that involve an element of challenge or risk. Overall, travelers are highly likely to take trips to their favorite destinations (75%) and/or trips to places they have heard about from people they know (68%).

Comfort, experience, and authenticity seem to be the primary themes among travelers. Many travelers (54%) prefer trips that offer no surprises with guaranteed quality of facilities and service. More than half of all travelers also prefer trips to destinations with authentic historic or archaeological buildings and sites (53%), as well as trips where they can experience cultures and lifestyles very different from where they live (49%).

Frequent travelers taking five or more trips a year are generally similar to the entire traveling population in their trip preferences; however, a few differences do emerge. In several ways, frequent travelers are more likely to seek culture and high-quality services. For example, frequent travelers are more likely to prefer trips where they can walk around historic/charming towns (72% vs. 67%), trips where they can experience people and cultures different from their own (55% vs. 49%), and trips to foreign-language destinations (30% vs. 23%). Along with these preferences, frequent travelers are also more likely to prefer trips to urban destinations (48% vs. 43%) and to seek high quality accommodations with excellent facilities and fine dining (50% vs. 45%).

As expected, there are several differences in travel preferences across the generations. Generally, Generation X and Y travelers are more apt to seek adventure while Mature travelers prefer the serene. Baby Boomers often fall somewhere between these two extremes. For example, young travelers are more likely to prefer outdoor adventure trips that involve an element of personal challenge and excitement (38%) and trips to remote locales (42%). On the other hand, Mature travelers are much more likely to seek group tour travel with guides and pre-set itineraries (40% vs. 23% Baby Boomers and 20% Generation X/Y). While the generations are equally likely to prefer trips where they can experience different cultures, Mature travelers (60%) are much more likely than young travelers (44%) to prefer trips where the primary purpose is to learn about the destination.

Men and women differ in their travel preferences as well. Women are much more likely than men to prefer trips to small towns/rural areas (64% vs. 56%) or trips to historic or charming towns (72% vs. 64%). Women are also more likely than men to prefer trips to places where their family is from to learn about their roots (53% vs. 42%). Women have distinct accommodation preferences as well. They are much more likely than men to prefer small-scale accommodations run by locals (54% vs. 45%) and historic hotels, inns, or bed and breakfast establishments (50% vs. 38%). On the other hand, women are much *less* likely than men to prefer outdoor adventure travel (21% vs. 30%), trips to go hunting and fishing (20% vs. 31%), and primitive travel in undisturbed wilderness (18% vs. 23%).

Destination and Trip Preferences*

	All Travelers	Frequent Travelers
Millions of American Adults =	154.0	49.0
Trips to favorite destinations I have been to before	75%	78%
Travel to destinations where I can experience the outdoors but still have comfortable accommodations	68%	71%
Trips to destinations I've heard about from friends and relatives	68%	70%
Trips where I can walk around in historic/charming towns/locations	67%	72%
Trips to family-friendly destinations	67%	68%
Trips to small towns/rural areas/countryside	60%	61%
Trips that offer no surprises/guaranteed quality of facilities and service	54%	56%
Trips to destinations with authentic historic or archaeological building and sites	53%	56%
Trips to destinations offering wide variety of cultural/arts events and attractions	52%	55%
Trips with primary purpose to see, tour and learn about a place	52%	56%
Trips including stays in small-scale accommodations, run by local people	49%	53%
Trips where I can experience people/lifestyles/cultures very different from where I live	49%	55%
Trips to places where my family is from, so I can learn more about my roots	48%	49%
Trips to destinations offering many forms of entertainment - nightlife, dining, shows	47%	49%
Trips including high quality accommodations with excellent facilities & fine dining	45%	50%
Trips including stays at historic hotels, inns, B&Bs	44%	49%
Trips to large cities	43%	48%
Travel to remote locales	35%	38%
Group tours with pre-set itinerary and tour guide	27%	27%
Outdoor adventure travel involving personal challenge/risk/excitement	25%	29%
Trips to go hunting/fishing	25%	24%
Trips to destinations where people do not speak English	23%	30%
Primitive travel (roughing it) in wilderness that is undisturbed by people	20%	21%

** Results are top-two box (5/4) on a 5-point scale where 5=completely agree and 1=completely disagree.*

Environmental Attitudes and Activities of Travelers

The majority of American travelers show some concern for and sensitivity about the environment in general. Most travelers believe that people must live in harmony with nature in order to survive (71%). Nearly 91 million travelers (59%) support controlling access to and/or more careful regulation of National Parks and public lands in order to help preserve and protect the environment. Sizeable shares of U.S. travelers are interested in helping to preserve and protect the environment if such efforts can conveniently fit it into their daily lives (40%) and/or say they would do more for the environment if they knew specific actions to take (37%). These attitudes are at least partially reflected in their at-home behaviors. The majority of travelers say that they make an effort to be sensitive to environmental concerns by recycling (75%) and trying to conserve electricity and water at home (70%). Nearly half (44%) report that they buy more energy efficient appliances even if they cost more and 30 percent buy environmentally safe household products even if they cost more.

More importantly, many travelers are proactive about having a positive impact on the environment through their purchasing and philanthropic behavior. About 43 million American travelers (28%) say they buy products and services from specific companies because they know that these companies make an effort to preserve and protect the environment. Just over 26 million travelers (17%) make donations to environmental organizations, nearly 25 million (16%) write to politicians or companies about their environmental or business practices, and over 15 million (10%) volunteer to work for nature/environmental organizations. Smaller percentages of travelers say they belong to either environmental, developmental and/or human rights organizations, or nature clubs. Yet when the travel spending of these environmentally-oriented consumers is aggregated, this group of American travelers can have a huge, positive impact on travel industry revenues.

While frequent travelers' attitudes on environmental issues do not differ from all travelers, their behaviors at home do differ somewhat. Frequent travelers are more likely to recycle at home (79%). Frequent travelers are also more likely to make donations to environmental organizations (22%) and/or to belong to a environmental/development/human rights group (15%).

Travelers' environmental attitudes and behaviors also differ across demographic groups. Mature and Baby Boomer travelers—who incidentally have higher incomes than younger travelers—are more likely than young travelers to recycle at home, conserve electricity and water, buy energy-efficient appliances, and buy environmentally safe household products. Mature travelers are especially likely to make donations to historic, cultural, or environmental organizations. Older travelers are more likely than Generation X and Y travelers to agree that people must live in harmony with nature and to support controlling access to national parks and public lands. While it would seem that Generation X and Y travelers are less environmentally-friendly, it may be from a lack of knowledge rather than a lack of willingness. These young travelers are the most likely of the generations to agree that they would do more for the environment if they knew of specific actions they could take.

Men and women travelers are generally similar in their environmental attitudes and behaviors, but there are a few differences. Notably, women are more apt to say they buy from companies they know make an effort to preserve and protect the environment. They are also more likely than men to say they would do more for the environment if they knew of specific actions they could take.

Interestingly, there are no major attitudinal differences across income groups; however, a few groups differ in their environmental behaviors. Those in the lowest income group (under $25,000 in household income) are the least likely to recycle at home. High-income travelers with $75,000 or more in household income are the most likely to buy energy-efficient appliances even if they cost more. Wealthier travelers are also most likely to make donations to environmental organizations.

	All Travelers	Frequent Travelers
Millions of American Adults =	154.0	49.0
Environmental Attitudes*		
People must live in harmony with nature to survive	71%	72%
I support controlling access to the National Parks to preserve/protect the environment	59%	57%
There should be more careful regulations of National Parks/public lands	59%	58%
I think sprawling development is a major problem	59%	60%
I am interested in helping the environment if I can fit it into my daily life	40%	41%
I would do more for the environment if I knew specific actions I could take	37%	35%
Plants and animals exist to be used by people	17%	16%
People should have unlimited freedom to modify the environment	9%	8%

** Results are top-two box (5/4) on a 5-point scale where 5=completely agree and 1=completely disagree.*

	All Travelers	Frequent Travelers
Environmental Behaviors*		
Recycle bottles, cans, newspapers at home	75%	79%
Save/conserve electricity/water at home	70%	71%
Buy more energy efficient appliances, even if they cost more	44%	45%
Read books/magazines or watch movies/videos about nature/environment	40%	41%
Buy environmentally safe household products even if they cost more	30%	32%
Buy from companies I know make an effort to preserve/protect environment	28%	29%
Make donations to nature/environmental organizations	17%	22%
Write politicians/companies about their environmental or business practices	16%	18%
Buy organic food products	12%	12%
Volunteer for nature/environmental organizations	10%	13%

** Results are top-two box (5/4) on a 5-point scale where 5= "all the time" and 1= "never".*

	All Travelers	Frequent Travelers
Environmental Affiliations		
Subscribe to nature/environment-oriented publications	14%	18%
Member of environmental/developmental/human rights group	12%	15%
Member of a nature club	6%	8%

Cultural/Heritage Attitudes and Activities of Travelers

American travelers seem to be slightly more likely to support and purchase from companies and organizations that are cultural/heritage oriented than companies that are environmentally oriented. Nearly one third (30%), or 46 million travelers, buy from specific companies because they know that these businesses donate part of their proceeds to charities versus 28 percent who do the same for environmental reasons. Nearly one quarter of all travelers buy products from local artisans (23%). Twenty-two percent say they make monetary donations to historic/cultural/education organizations and 16 percent volunteer to work for such organizations at home.

Significantly large numbers of American travelers are interested in history and culture, as reflected in their beliefs and local area activities. For example, the majority of American travelers believe that it is important that future generations know and pass on our nation's history (85%). Over 95 million (62%) believe it is important to learn about other cultures when they travel. Half of all travelers (50%) express a similar sentiment that it is important to learn about people with ethnic heritages different from their own. Many travelers (54%) support additional funding for the preservation of historic sites and monuments, while 38 percent support additional funding for the cultural/visual performing arts. Also, nearly half of all travelers support controlling access to historic sites so that they may be preserved and protected (48%).

Furthermore, one half (49%) of all travelers say they eat in ethnic/specialty restaurants in their local area, and nearly as many attend community festivals and ethnic celebrations (45%). Many (44%) like to read books/magazines or watch movies/videos about history and culture. Four in ten travelers (40%) say they visit historic sites and museums in their local areas. Over one quarter of all travelers attend performing arts events (28%) and/or visit art museums/galleries (26%) in their local areas. Travelers' positive attitudes about culture and history, as well as their attraction to such activities at home, almost certainly extend to the activities they choose to do while traveling.

Mature travelers ages 55 or older are more inclined to recognize the importance of preserving culture and history than Generation X and Y. Mature travelers are more likely to feel it is important to learn about other cultures, to support controlled access to historic sites, and to think there should be more public or private funding for the cultural/visual/performing arts. Engaging in the cultural aspects of their local area is also important to Mature travelers. For example, they are more likely than younger travelers to attend local performing arts events and/or visit art museums and galleries.

Women are more apt than men to recognize the importance of learning about other cultures and about people with different ethnic backgrounds. Thus, it is not surprising that women are more likely than men to engage in local cultural pursuits such as attending festivals or ethnic celebrations, visiting historic sites or museums, and buying products from local artisans. Women are also more likely to buy products from companies that donate part of their profits to charities.

Travelers with $75,000 or more in annual household income are more culturally inclined compared to those with lower incomes. Because they are likely to have more disposable income, higher shares of wealthier travelers are more likely to make donations to historic, cultural, or educational organizations compared to other travelers. These higher-income travelers are also more likely to feel there should be more funding for cultural and performing arts.

	All Travelers	Frequent Travelers
Millions of American Adults =	154.0	49.0
Cultural/Heritage Attitudes		
It is important that future generations know and pass on our nation's history	85%	86%
It is important to learn about other cultures	62%	66%
There should be more funding for preservation of historic sites/monuments	54%	53%
It is important to learn about people with ethnic heritages different from my own	50%	53%
I support controlling access to historic sites so that they can be persevered/protected	48%	48%
There should be more funding for cultural/visual/performing arts	38%	41%

** Results are top-two box (5/4) on a 5-point scale where 5=completely agree and 1=completely disagree.*

	All Travelers	Frequent Travelers
Cultural/Heritage Behaviors		
Eat at fine dining restaurants in local area	50%	55%
Eat at ethnic/specialty restaurants in local area	49%	54%
Attend festivals/ethnic celebrations in local area	45%	50%
Read books/magazines or watch movies/videos about history/culture	44%	48%
Visit historic sites/museums in local area	40%	44%
Buy from companies I know donate part of their proceeds to charities	30%	31%
Attend performing arts events in local area	28%	35%
Visit art museums/galleries in local area	26%	32%
Buy products from artisans in local area	23%	27%
Make donations to historic/cultural/education organizations	22%	28%
Volunteer for historical/cultural/educational organizations	16%	19%

** Results are top-two box (5/4) on a 5-point scale where 5= "all the time" and 1= "never".*

	All Travelers	Frequent Travelers
Cultural/Heritage Affiliations		
Subscribe to season tickets for performing arts	10%	15%
Member of an historic/cultural society	10%	15%
Subscribe to historic or arts-oriented publications	7%	11%

Traveler Participation in Civic Activities at Home

Travelers' other at-home behaviors, interest in civic activities, and intellectual curiosity and involvement can be good indicators of their attitudes and behaviors while traveling for leisure. American travelers overall are varied in their civic and local engagement. For example, most travelers (81%) claim they vote in national and state or local elections. Yet few participate in local politics (14%) and/or civic organizations (20%). A majority (65%) reads a daily newspaper. Over half of travelers say they watch publicly supported television (54%) and about one in four (24%) take classes or attend seminars and lectures in their local area.

Frequent travelers have an even higher participation in some civic activities. Frequent travelers are more likely to vote and participate in civic organizations. They also seem to be more physically active than travelers overall, as frequent travelers are more likely to exercise and/or participate in outdoor recreation in their local area.

Frequency of Traveler Participation in Various Civic Activities*

	All Travelers	Frequent Travelers
Millions of American Adults =	154.0	49.0
Vote in national elections	81%	86%
Vote in state/local elections	79%	83%
Read daily newspaper	65%	69%
Watch publicly-supported TV	54%	56%
Attend religious services	53%	57%
Exercise/participate in sports	46%	50%
Participate in outdoor recreational activities in local area	34%	38%
Try new products/services before others do	29%	32%
Take classes/attend seminars/lectures in local area	24%	27%
Participate in civic organizations	20%	27%
Participate in local politics	14%	18%
Buy organic food products	12%	12%

* *Results are top-two box (5/4) on a 5-point scale where 5=completely agree and 1=completely disagree.*

There are many demographic differences when it comes to traveler participation in civic activities. Generation X and Y travelers are significantly less likely than Matures or Baby Boomers to vote in elections, read a daily newspaper, and watch publicly supported television. On the other hand, Generation X/Y and Baby Boomer travelers are more likely than Matures to exercise and/or participate in local outdoor recreation activities. Mature travelers are significantly more likely than travelers under age 55 to participate in civic organizations and/or participate in local politics.

There are few differences in participation by gender. Most notable is that men are more likely than women to stay they exercise and/or participate in local outdoor recreation. Women are more likely than men to take classes or attend seminars in their local area. Not surprisingly, there are many differences in civic participation across income groups. Travelers earning over $50,000 per year in household income are more likely than those with lower incomes to vote in elections Travelers with household incomes of $75,000 and above are more likely than any other income group to participate in civic organizations.

GEOTOURISM IN TRAVEL COMPANY PRACTICES

Factors Affecting Selection Of Travel Companies

When cost or price is not a consideration, it is not surprising that most American travelers (82%) think quality of service has the strongest influence on which travel companies they choose to use. Yet convenience also has a strong influence on the traveler's decision-making process. For example, three out of four (77%) travelers say the accessibility of travel firms has a strong influence on the choice of companies to use. A full 69 percent say that convenient ways to book or pay for travel would highly influence their decision to use a particular firm. While the quality of amenities offered by travel firms is influential to a majority of travelers (69%), past experience with the company is just as important (68%). The brand or reputation of the travel company strongly influences 60 percent of travelers.

Importantly, one in every three travelers say they are influenced by travel companies that make a commitment to protect the environment and/or sustain local culture. About 54 million travelers (35%) are inclined to select a company that strives to protect and preserve the local environment; and nearly as many (34%) support companies that strive to protect and preserve the history and culture of a destination.

Factors Influencing Selection of Travel Companies*

	All Travelers
Millions of American Adults =	154.0
Quality of customer service	82%
Accessibility/location	77%
Offers a convenient way to book and/or pay	69%
Quality of amenities offered	69%
Past experience with company	68%
Reputation/Brand of Company	60%
Recommendations from relatives/friends/co-workers	52%
Is a family-friendly company	46%
Being aware that company strives to preserve/protect environment of destination	35%
Being aware that company strives to preserve/protect history/culture of destination	34%
Has frequent customer program you belong to	22%

** Results are top-two box (5/4) on a 5-point scale where 5=extremely influential and 1=not at all influential.*

Demographics also play a role in how consumers select travel companies to use. Mature travelers (41%) are more likely than Baby Boomers (36%) and Generations X/Y (31%) to say that their choice of company is influenced by its efforts to preserve and protect the natural environment of destinations. Mature travelers are also more likely to say they are influenced by company efforts to preserve the history/culture of destinations (40%). For Mature travelers, these two factors have a stronger influence on company selection than being a family-friendly company or having a frequent customer program.

There are several gender differences as well. Women are more likely than men to select a travel company based on their efforts to preserve and protect the environment of destinations. Women are also more apt to choose travel companies based on accessibility/location, recommendations from people they know, and family-friendliness.

The factors that most influence company selection do not differ greatly across the income groups. Only quality of customer service and company reputation are cited much less often by those with household incomes of less than $25,000 compared to other income groups. Travelers with $75,000 or more in annual household income are the least likely of all income groups to be influenced by family-friendliness; however, they are the most likely to be influenced by frequent customer programs.

Travel Company Practices that Preserve/Protect the Environment of Destinations

Only about half (52%) of all travelers are aware of at least one practice employed by travel companies to preserve and protect the environment of destinations. Travelers are most often aware of companies that ask customers to reuse towels/sheets (36%) and those that use energy saving practices (30%). About one in five travelers (21%) are aware of travel companies that recycle and/or that use local vegetation on property grounds. Overall, few travelers are aware of any travel companies that publicly display their environmental practices or that educates customers on how to protect the local environment during their stay. This suggests that travel companies may be able to do more to make their customers aware of their efforts to protect and preserve the environment.

Of the 52 percent of the travelers who are aware of efforts on the part of travel companies to protect and preserve the environment, the majority of them participate in the programs and practices available. For example, 75 percent of aware travelers have used a travel company that requests guests to re-use sheets and towels. Among travelers aware of companies that recycle and/or use local vegetation on property grounds, many have used such companies (62% and 63%, respectively.) While only 30 percent of travelers are aware of companies that use energy efficiency measures, 60 percent of those aware have used companies that perform this practice.

Ironically, while many aware travelers have participated in re-using linens in a hotel (75%)—the most widely known environmental program—many feel that this practice has a relatively low positive impact on the environment (32%). Whether or not they are aware of travel companies' environmental practices, many travelers believe some practices do have an impact on preserving and protecting the environment of destinations. When comparing these practices, travelers are most likely to believe that using energy efficiency measures has a strong impact on protecting the environment (50%). Recycling and using environmentally-friendly cleaning products also are perceived to have a relatively high impact (47% and 46%, respectively.) Even practices that have low awareness among travelers are perceived to have a strong impact on the environment. For example, few travelers are aware of organizations that manage the number of visitors to protect scenic areas (14%) or that donate a portion of profits to conservation efforts (10%). Yet 38 percent and 37 percent, respectively, believe these practices would have a strong impact on preserving the environment of destinations.

Still, many travelers are willing to pay more to companies that protect the environment. Although most travelers are concerned with price and value, 58.5 million (38%) say they would pay more to use a travel company that strives to protect and preserve the environment. Most important, the majority (61%) of those who would pay more to use such companies would in fact pay five to ten percent more.

Travel Company Practices that Preserve/Protect the Environment of Destinations

	Aware of Co.'s That…	Ever Used* Co. That…	Does Practice Have Impact?**
Requests that customers re-use towels and sheets	36%	75%	32%
Uses energy-efficient lighting, heating and air conditioning	30%	60%	50%
Recycles paper, plastic and glass	21%	62%	47%
Uses plants and vegetation from local area on grounds	21%	63%	35%
Uses environmentally-friendly cleaning products	18%	52%	46%
Publicly displays their environmental practices	16%	53%	27%
Educates customers how to protect local environment during their stay	15%	59%	32%
Manages number of visitors to help preserve natural/scenic areas	14%	42%	38%
Donates part of their profits to conservation/management of natural/protected areas	10%	40%	37%
Offers customers discounts or upgrades if they donate to local environmental organ	5%	45%	22%
None of these	48%	N/A	N/A

**Among those aware of practice.*
***Results are top two boxes (5/4) on a 5-point scale where 5=great impact and 1=no impact at all.*

Travel Company Practices that Preserve/Protect the History and Culture of Destinations

Over half of all travelers (56%) say they are aware of travel companies that strive to protect and preserve the history and culture of destinations. Such practices as using décor that reflects the local culture and offering local cuisine seem to be the most visible, as four in ten travelers are aware of each. About one third of travelers are aware of travel firms that offer a way to purchase tickets to local performances or special events (35%) and/or offer guided heritage/cultural tours (31%). Travelers are not as aware of firms that donate to local charities or to historic preservation efforts, nor are they as aware of firms that support community beautification projects.

For many travelers, awareness of a firm's effort translates into usage. Companies that implement the most visible practices of using décor that reflects the local culture and offering local cuisine are the most likely to be used. A majority (58%) of those aware of firms that offer a convenient way to purchase cultural performance/event tickets say they have used such firms. While nearly one third (30%) of travelers are aware of companies that provide printed materials/videos on the destination's culture, a full 61 percent of those travelers have used such a firm.

Which company practices are perceived to have the most impact on preserving a destination's history and culture? Travelers are most likely to mention offering a convenient way to purchase performance/event tickets (46%), offering guided heritage/culture tours (45%), and offering local cuisine (43%). Many travelers think that supporting community beautification projects (41%) and/or donating unused food to local charities (40%) also have an impact on preserving the culture of destinations.

Nearly four in ten travelers (39%) say they would choose a travel company that preserves and protects the history and culture of destinations, even if it costs more. This equates to 58 million travelers who would pay more to use companies that preserve the history and culture of destinations—about the same number of travelers who would pay more for companies that preserve and protect the environment of destinations. Among those who would pay more, a majority (67%) would pay at least five percent more to use companies that preserve and protect the history and culture of destinations.

Travel Company Practices that Preserve/Protect the History and Culture of Destinations

	Aware of Co.'s That…	**Ever Used* Co. That…**	**Does Practice Have Impact?****
Use décor that reflects uniqueness of local culture/heritage	42%	61%	32%
Offers local cuisine	40%	61%	43%
Offers a convenient way to purchase advance tickets to performances/special events	35%	58%	46%
Offers guided heritage and/or cultural tours of local neighborhoods or historic district	31%	55%	45%
Provides printed materials and/or videos on destination's culture/heritage	30%	61%	38%
Provide opportunities for career advancement for local residents	20%	53%	33%
Manage number of visitors to help preserve historic sites/monuments	14%	50%	36%
Supports community beautification projects	13%	43%	41%
Donates part of their profits to preservation of historic sites/monuments	13%	53%	38%
Donates left-over/unused non-perishable food to local charities	11%	46%	40%
Offers customers discounts or upgrades if they donate money to local charities	6%	39%	24%
None of these	44%	N/A	N/A

**Among those aware of practice.*
***Results are top two boxes (5/4) on a 5-point scale where 5=great impact and 1=no impact at all.*

Sources of Information for Travel Firms' Destination Preservation Practices

How can travelers find out what travel companies are doing to protect and preserve the environment and culture of destinations? How can travel marketers best reach consumers with their messages? Generally, travelers think the best sources for such information are travel guidebooks and in-room guides at lodging establishments. Travel magazines, travel supplier brochures, and travel agencies are also good sources of information on what companies are doing to protect and preserve the destination's environment and culture.

The top three sources used by travelers to find this type of information are travel guidebooks, in-room guides and travel magazines. Yet across information sources, an interesting dichotomy exists between information on companies environmental preservation efforts and information on historic/cultural preservation efforts. For example, 33 percent feel destination tourism offices are a good resource for finding companies that strive to preserve history and culture, while only 27 percent see destination tourism offices as a good source for companies that protect and preserve the environment.

Best Sources for Information on What Travel Companies Are Doing To…*

	Protect/Preserve Environment	Protect/Preserve History/Culture
Travel guidebooks	43%	47%
In-room guides	42%	39%
Travel magazines	37%	39%
Travel suppliers brochures	35%	36%
Travel agencies	34%	36%
Travel suppliers websites	30%	29%
Destination websites	29%	29%
TV advertising	28%	28%
Destination tourism offices	27%	33%
Tour operators	21%	25%
Online travel guides	21%	25%
In-flight magazines	17%	17%
Online travel agencies	14%	16%
None of these	11%	11%

** Multiple responses allowed*

There are some demographic differences in travelers' choice of the best information sources. Mature travelers are the least likely generation to feel travel websites, online guides, or online agencies are good sources for information on company practices. Women are more likely than men to think travel guidebooks, travel magazines, and brochures are good sources for such information. They are also more likely than men to cite online travel guides and online agencies as good resources. Lower-income travelers (less than $25,000 in annual household income) are the most likely of all income groups to think travel agencies and television advertising are good sources for sources for information on company environmental and cultural preservation practices.

THE GEOTOURISM MARKET SEGMENTS

Thus far, this report has examined the attitudes and awareness of average American travelers with regard to various Geotourism issues. In this section we are able to give more finite data to allow users to make an assessment based on the actions, awareness and attributes of specific groups of travelers.

Overall, the majority of travelers show positive attitudes toward protecting and preserving the environment and culture of destinations. Of course not all travelers are alike in their geotourism inclinations, that is, beliefs about responsible tourism and destination stewardship. Segmenting travelers by their travel preferences and civic activity participation, as well as their attitudes toward the environment, culture, and history yields eight distinct geotourism segments.

These traveler segments are indeed travel markets in and of themselves. Not only does each group have unique geotourism attitudes and characteristics, each has a different demographic and travel experience profile.

So how can the industry benefit from segmenting American travelers in this new way?

As the industry changes it will be important to ferret out what will motivate the consumer to not only continue to travel, but to justify and encourage increased spending for the betterment of the product. Consumer expectations are not easy to determine. What this study has made clear is the rising awareness among travelers that their choices play a role in helping to sustain destinations and authentic travel experiences. It is apparent that making consumers aware of certain practices —and anticipating what they perceive will have positive impact—will be key in securing their support and loyalty.

What can travel industry firms and destinations do to attract those segments with the strongest geotourism inclinations?

This portion of the report examines by segment what the most aware and active “Geotourists” will expect – and what they have responded to versus what the more average travelers will look for when traveling. It gives specific insight into how they perceive practices already in place, as well as an indicator to which market group is willing to pay more for companies to continue good efforts and adopt new ones.

Are these market segments lucrative enough for the industry to target in earnest?

The three most aware and active geotourism segments make up 55.1 million of the 154 million American travelers. These segments—Geo-savvys, Urban Sophisticates, and Good Citizens—represent the most traveled, highest spending and most educated travelers. These travelers expect travel companies to keep environmental and cultural preservation top of mind while carrying out day-to-day business practices. In addition to these three segments, there are three others that are slightly less inclined toward geotourism, yet still generate a fair amount of revenue for the industry.

Three groups of American travelers emerge with the strongest geotourism inclinations compared to the other five market segments. These three segments share similar levels of income and a high incidence of travel, yet each possesses a somewhat unique *Geotourism* profile. Still, they are alike in their attitudes about travel and their beliefs in preserving and protecting destinations. In total, these three groups represent 55.1 million Americans, greater than one third of the total 154 million American travelers. They are:

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

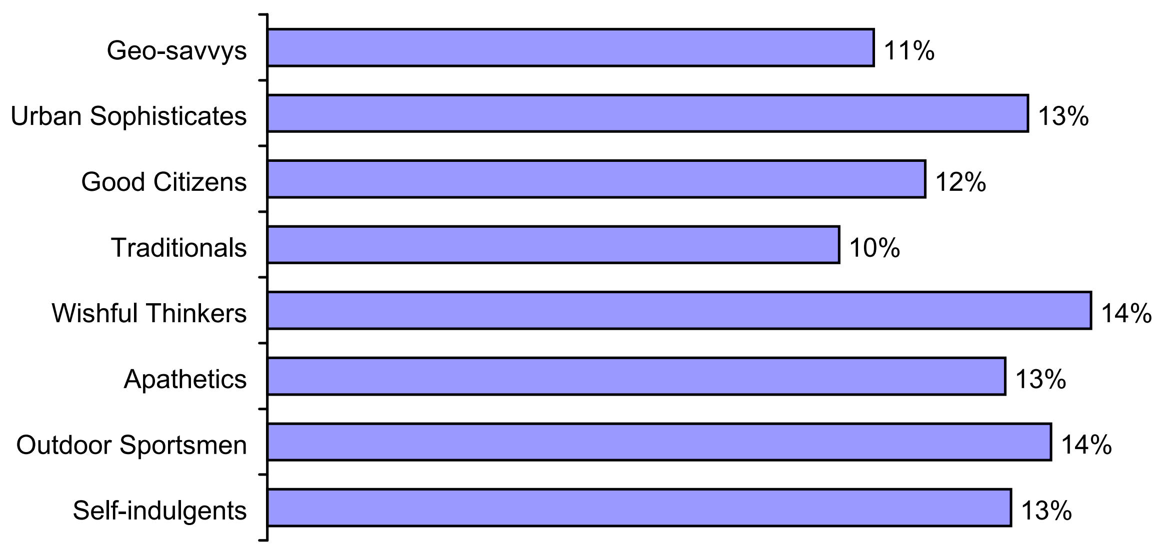
Three other segments can be grouped by income and travel behaviors, though these three vary from each other in age, life stages, and attitudes. These three segments can be considered potential markets for Geotourism. In total, these segments also make up more than a third (58.3 million) of all adult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

Geotourism Segment Share of U.S. Travelers
(Among 154 million U.S. Adult Travelers)



GEO-SAVVYS (16.3 MILLION TRAVELERS)

Geo-savvys travel the most frequently compared to all other segments. This group has the highest average number of annual trips (7.9), with 44 percent, or 7.1 million travelers, taking five or more trips in the past year. Geo-savvys, along with Urban Sophisticates, are the most likely to have traveled internationally. Four in ten (43%) Geo-savvys have taken at least one international trip in the past three years. They report the highest average number of annual pleasure trips (5.5) compared to all other segments. Geo-savvys have a high incidence of business travel (42%) and high past-year business travel frequency (5.6 trips on average.) Due to this high propensity for business travel, the majority (65%) of Geo-savvys has taken one or more trips by air in the past year. Along with Urban Sophisticates and Self-indulgents, Geo-savvys are among the most likely to have used expensive or luxury hotels in the past three years (68%). In fact, Geo-savvys have a high propensity to use all types of lodging including moderately priced (78%) and budget (58%) lodging. They also have the highest propensity to use first- and/or business-class air service (13%) compared to the other segments. Interestingly, Geo-savvys are the most likely of the segments to have used an RV in the past year.

Demographic Profile

Demographically, Geo-savvys tend to be highly educated and affluent. In addition:

- Geo-savvys are slightly more likely to be women (54% or 8.8 million) than men (46%). Over half of women in the segment are baby boomers (53%); 47 percent of men are baby boomers.
- One in four (28%) Geo-savvys is a young adult under age 35.
- Along with Urban Sophisticates and Good Citizens, they are very well educated with 60 percent having at least a college degree. One in three (33%) has a graduate degree.
- One third of Geo-savvys (32%) hold professional/specialty positions, similar to Urban Sophisticates and Good Citizens. While only eight percent are students, Geo-savvys are more likely than other clusters to still be in school.
- Over 6.1 million households, or one third (38%), have annual household incomes over $75,000; 17 percent have household incomes above $100,000.
- 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.

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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Given Geo-savvys strong geotourism inclinations, it is not surprising that they are the most familiar with travel organizations that use energy conservation measures (37%), use environmentally-friendly cleaning products (25%), manage the number of visitors (22%), and/or donate part of profits to conservation efforts (16%). Geo-savvys are also among the most likely to have used companies with such practices, especially those that request customers to re-use sheets and towels (76%) and that use energy conservation measures (63%).

- Along with Urban Sophisticates, Geo-savvys are more likely than other segments to believe that educating customers on how to protect the environment and managing visitor numbers in scenic areas will have a strong impact on preservation (42% and 44%, respectively).

- Half of Geo-savvys (50%) say they would choose to use a travel company that preserves/protects the environment even if they had to pay more. This is a higher proportion than any segment except Urban Sophisticates. Among the Geo-savvys who would pay more, most (70% or 5.7 million people) would pay between five and ten percent more.

Travel Company Selection – Protection and Preservation of Culture and History:

- Compared to other segments, Geo-savvys are also most likely to be familiar with one or more travel companies who preserve and protect the history and culture of destinations (63%). They are also the most likely to be familiar with companies that use décor reflective of the local heritage (52%) and that offer local cuisine (48%). Geo-savvys are the most likely travelers to say they are aware of travel organizations that manage the number of visitors to historic sites (22%)

- Many Geo-savvys have also used travel companies who implement historic/cultural preservation practices. "Aware" Geo-savvys are among the segments highly likely to have used companies that use décor reflective of the local heritage (66%), that offer guided cultural/heritage tours (63%), and that offer local cuisine (60%).

- Geo-savvys, along with Urban Sophisticates, are the most idealistic of the geotourism segments. Many think that several company practices will have an impact on preserving and protecting the history and culture of destinations. For example, over half (51%) of Geo-savvys believe that managing the number of visitors at historic sites and monuments would have an impact. This is also way above the average of 36 percent for travelers in general.

- Geo-savvys are highly likely to select a travel company that strives to preserve the history and culture of destinations, even if using that company would cost more (53%). This is compared to only 25 percent for Apathetics and 20 percent for Self-indulgents. Most Geo-savvys who would pay more (70%) would pay an extra five to twenty percent more.

URBAN SOPHISTICATES (21.2 MILLION TRAVELERS)

A much larger segment of the population than the Geo-Savvy group, the actions, attitudes and opinions of Urban Sophisticates is bound to have a greater impact on the travel market. However, these two groups closely correlate on behavior and opinions in several areas and hence can be viewed as one very large market segment in many cases.

Urban Sophisticates, named largely by where they tend to live, travel quite frequently and are indeed sophisticated travelers. This group took an average of 6.7 trips in the past year. In fact, 39 percent of this segment (compared with 44% of Geo Savvys) traveled five or more times in the past year. Nearly half of Urban Sophisticates (47%) have taken at least one international trip in the past three years, the highest of any other segment – yet only slightly more than Geo-savvys. Along with Good Citizens and Geo-savvys, Urban Sophisticates have a relatively high average annual number of pleasure trips (4.6) compared to the average American traveler. Given their high incomes, it is not surprising that Urban Sophisticates have a high incidence of business travel. Four in ten (41%) have taken at least one business trip in the past year. A full 73 percent have used expensive and/or luxury hotels on pleasure trips taken in the past three years. Urban Sophisticates are also the most likely of all segments to have taken a cruise (18%).

Demographic Profile

As the segment name indicates, Urban Sophisticates tend to be affluent and live in heavily populated cities. Also:

- Urban Sophisticates are more likely to be women (60% or 12.7 million) than men (40%). Over half of these women are baby boomers (53%); 29 percent are younger women under age 35. One third (33%) of men in the Urban Sophisticates segment are 55 years of age or older.

- Urban Sophisticates, along with Good Citizens and Geo Savvys, are very well educated with 63 percent having at least a college degree, and one third (34%) 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 has a professional/specialty position. 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 (23%) Urban Sophisticates has an annual income of at least $100,000, more than any other segment.

- 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.

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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Of all the geotourism segments, Urban Sophisticates are the most aware of companies that preserve and protect the environment of destinations (61%). Urban Sophisticates are the most familiar with companies that ask customers to re-use towels and sheets (48%) or that educate customers on how to protect the local environment during their stay (21%).

- Most Urban Sophisticates (83%) are also highly likely to have actually used companies that ask customers to re-use towels and sheets. The same is true for companies that recycle (69%), use vegetation from the local area (69%), and educate customers on how to protect the environment during their stay (69%).

- When it comes to environmental practices, Urban Sophisticates are the most idealistic of the geotourism segments. These upscale travelers are the most likely to perceive that practices such as educating customers on protecting the local environment during their stay (44%), managing the number of visitors to natural sites (60%), donating part of profits to conservation efforts (54%), and offering customers discounts for donations (32%) will have an impact on preserving the environment of destinations.

- More than any other segment, Urban Sophisticates are the most likely to choose a travel company they know will protect and preserve the environment, even if it costs more (55%). These travelers are also willing to pay the highest premium to use such companies. Most (76%) Urban Sophisticates would pay at least five percent more, and 30 percent at least ten percent more.

Travel Company Selection – Protection and Preservation of Culture and History:

- Just as they are the segment that is the most aware of travel companies that practice to preserve the environment, Urban Sophisticates are also the most familiar with companies that employ practices to preserve the history and culture of destinations (70%). Compared to the other segments, these travelers are most familiar with travel companies that use decor reflecting the local culture (55%), offer local cuisine (54%), offer a convenient way to purchase cultural/arts events tickets (45%), offer guided heritage/cultural tours of the area (40%), provide printed materials/videos on the destination's heritage (39%), provide career advancement opportunities for local residents (27%), and support community beautification projects (18%).

- For most historic/cultural heritage practices of which Urban Sophisticates are aware, these travelers say they have also used travel firms with these practices. For example, nearly three in four "aware" Urban Sophisticates say they have used a firm that offers guided heritage tours of the destination (73%) and/or a firm that offers local cuisine (72%). Also, 72 percent of these Urban Sophisitcates say they have used a company that uses décor reflecting the local heritage of the destination, and 70 percent have used a company that provides career advancement opportunities for local residents.

- Urban Sophisticates are fairly confident that most geotourism practices will have an impact on preserving the history and culture of destinations. For example, Urban Sophisticates are the most likely to think that the these practices will have an impact: supporting community beautification projects (61%), offering guided cultural/heritage tours (60%), managing number of visitors to help preserve historic sites (52%), donating profits to preservation of historic sites (53%), and donating leftover/non-perishable food to charities (53%).

- As with companies that strive to protect the environment of destinations, Urban Sophisticates are also the most willing to use travel companies that preserve the history and culture of destinations even if it costs more (59%). Over one quarter (29%) of those willing to pay more would pay at least 10 percent more.

GOOD CITIZENS (17.6 MILLION TRAVELERS)

On average, Good Citizens take 6.0 trips per year on average, but most (59%) are infrequent travelers taking only one to four trips per year. Good Citizens are not as well-traveled as Urban Sophisticates and Geo-savvys, given that one in three (36%) has traveled internationally at least once in the past three years. Still, they more likely than the remaining segments to have taken a trip abroad. Along with Self-indulgents, Urban Sophisticates, and Geo-savvys, Good Citizens have a relatively high average annual number of leisure trips (4.6). Good Citizens have a high tendency toward business travel (34%), as do Urban Sophisticates and Geo-savvys. On average, Good Citizens take 4.6 business trips per year. Thus, the majority (63%) of Good Citizens have taken an air trip in the past year. When it comes to accommodations, Good Citizens are highly likely to stay in moderately priced lodging (75%). Good Citizens are also highly likely (16%) to have taken a cruise in the past three years.

Demographic Profile

Good Citizens' demographic profile reflects an older, but wiser set with an element of affluence. Additionally:

- Good Citizens are more likely to be women (54%) than men (46%).
- Over half (56%) of men in this segment are age 55 or over. 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 37 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 ($70,300) is among the highest of all segments. Four in ten Good Citizens (41%) have annual household incomes above $75,000.
- Sixteen percent 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%).

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%). In addition, 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%).

Travel Company Selection – Protection and Preservation of the Environment:

- While Good Citizens demonstrate strong geotourism inclinations, they are not as keen on what companies are doing to protect and preserve the environment of destinations. Only 51 percent of Good Citizens say they are aware of travel companies that have implemented environmental protection practices, much lower than Geo-savvys or Urban Sophisticates. As with several segments, the practices that rank highest in awareness include asking customers to re-use towels and sheets (35%), using energy efficient systems (32%), and recycling (25%).

- Good Citizens are not as likely as Geo-savvys and Urban Sophisticates to say they have used travel firms that practice to preserve the environment of destinations. Nearly half (49%) of Good Citizens who are aware of such firms say they have not used these firms. Yet those who have, a majority say they have used a travel company that asks customers to re-use towels and sheets (82%), recycles (72%), and educates customers on how to protect the environment of the destination during their stay (72%).

- Interestingly, Good Citizens are more skeptical than Geo-savvys and Urban Sophisticates about whether these practices will have an impact on preserving and protecting the environment of destinations. Good Citizens have a relatively strong perception about asking customers to re-use towels and sheets (36%) compared to Geo-savvys (33%), but this is lower than that of Urban Sophisticates (40%). For most other environmental practices, Good Citizens' perceptions of their impact are lower than those of other segments.

- Good Citizens are similar to Geo-savvys and Urban Sophisticates in that many of these travelers are willing to choose a travel firm that protects and preserves the environment of destinations, even if it costs more. Yet they would not pay as much of a premium to use such travel companies. Only 60 percent of Good Citizens would pay 5 percent or more compared to 79 percent of Urban Sophisticates and 75 percent of Geo-savvys.

Travel Company Selection – Protection and Preservation of Culture and History:

- On most practices that preserve the history and culture of destinations, Good Citizens awareness levels are slightly lower than those of Geo-savvys and Urban Sophisticates but generally similar to the average traveler. Two company practices are the exceptions. Good Citizens are more likely than the average to be aware of companies that offer customers a convenient way to purchase advance tickets to performances and special events (39% vs. 35%) and that offer guided cultural/heritage tours of the local area (35% vs. 31%).

- For some historic/cultural heritage practices of which Good Citizens are aware, these travelers are more likely than even Geo-savvys to say they have used travel firms with these practices. Many more "aware" Good Citizens say they have used a travel company that provides customers with printed materials or videos on the destination's culture (74% vs. 56% Geo-savvys). The same is true for practices such as offering customers discounts or upgrades if they donate money to local charities (60% vs. 42% Geo-savvys) and supporting community beautification projects (47% vs. 35% Geo-savvys).

- The impacts of most cultural/heritage preservation practices are generally fairly apparent to Good Citizens, although not more so compared to the average traveler. Good Citizens are most likely to believe that offering customers a convenient way to buy cultural/arts events tickets and offering customers guided cultural tours of the local area will have an impact on preserving the culture of destinations (50% and 44%, respectively).

- Good Citizens are just as likely to choose travel companies on the basis of their environmental practices as they are on the basis of their cultural preservation practices (48% vs. 47%), even if they have to pay more. Along with Urban Sophisticates and Geo-savvys, Good Citizens are still more likely than other segments to be willing to pay more to companies that preserve and protect the history and culture of destinations. Good Citizens who would pay more to use such travel companies are likely to pay a premium of no more than five percent (75%).

GEOTOURISM SEGMENT CHARACTERISTICS
Table 2

GEOTOURISM SEGMENT CHARACTERISTICS	Total Travelers	Geo-Savvys	Urban Sophisti-cates	Good Citizens
Base = millions of U.S. adults	154.0	16.3	21.2	17.6
Travel Frequency-Past 3 Years				
1-4 trips	36%	22%	30%	32%
5+ trips	64%	78%	70%	68%
Avg. no. of trips (excl. 0)	11.7	16.8	13.6	12.2
1+ trips outside the U.S.	29%	43%	47%	36%
Travel Frequency Past Year				
No trips in past year	6%	4%	6%	4%
1-4 trips	60%	51%	55%	59%
5+ trips	34%	44%	39%	37%
Avg. no. of trips (excl. 0)	5.7	7.9	6.7	6.0
Pleasure Travel Frequency Past Year				
No pleasure trips in past year	10%	4%	8%	6%
1-4 pleasure trips	67%	65%	65%	66%
5+ pleasure trips	23%	29%	25%	27%
Avg. no. of pleasure trips (excl. 0)	4.3	5.5	4.6	4.6
Business Travel Frequency Past Year				
No business trips in past year	68%	58%	59%	66%
1-4 business trips	25%	32%	30%	28%
5+ business trips	7%	10%	11%	6%
Avg. no. of business trips (excl. 0)	4.5	5.6	5.2	4.6
Air Travel Frequency Past Year				
No trips by air in the past year	47%	35%	27%	37%
1-4 air trips	46%	55%	56%	53%
5+ air trips	7%	10%	17%	10%
Avg. no. of air trips (excl. 0)	3.1	3.6	3.8	3.5
Paid Lodging Use in Past Year				
No paid lodging trips in the past year	16%	11%	11%	23%
1-4 paid lodging trips	66%	68%	67%	62%
5+ paid lodging trips	18%	20%	23%	14%
Avg. no. of paid lodging trips (excl. 0)	3.8	4.7	4.9	4.2
Type of Paid Lodging Used in Past Three Years On Pleasure Trips*				
Luxury hotel on pleasure trip	14%	17%	20%	13%
Expensive hotel on pleasure trip	41%	51%	53%	44%
Moderate hotel on pleasure trip	66%	78%	61%	75%
Budget hotel on pleasure trip	48%	58%	48%	47%
Rental condo/home on pleasure trip	21%	27%	22%	19%
Bed & breakfast on pleasure trip	12%	20%	16%	11%
Owned condo/home on pleasure trip	11%	9%	9%	9%
Cruise	13%	13%	18%	16%
Transportation Used in Past Year On Pleasure Trips*				
Personal Car/Truck	63%	70%	56%	63%
Coach Class Air	32%	40%	47%	39%
Rental Car	17%	25%	22%	18%
Motorcoach/Bus	6%	9%	8%	9%
Business Class Air	2%	6%	3%	3%
First Class Air	3%	7%	6%	2%
Inter-City Train	3	6	5	4
RV	3	9	1	3

**Multiple responses allowed.*
Source: Travel Industry Association of America

GEOTOURISM SEGMENT CHARACTERISTICS
Table 2, continued

GEOTOURISM SEGMENT DEMOGRAPHICS	Total Travelers	Geo-Savvys	Urban Sophisti-cates	Good Citizens
Base = millions of U.S. adults	154.0	16.3	21.2	17.6
Gender				
Male	48%	46%	40%	46%
Female	52%	54%	60%	54%
Age				
18-24	11%	11%	7%	5%
25-34	19%	17%	19%	8%
35-44	24%	28%	25%	16%
45-54	19%	22%	25%	20%
55+	27%	22%	24%	51%
Average (mean)	44.7	43.5	45.0	54.7
Marital Status				
Married	73%	70%	63%	76%
Never married	13%	14%	21%	8%
Divorced, Widowed, Separated	14%	16%	16%	16%
Children in Household	41%	37%	29%	26%
Education				
High School or less	22%	8%	10%	12%
Some college	32%	32%	29%	25%
Completed College	24%	27%	27%	26%
Post-graduate	21%	33%	34%	37%
Employment				
Full-time	57%	59%	64%	45%
Part-time	12%	16%	9%	9%
Unemployed/Homemaker/Other	15%	13%	15%	12%
Retired	16%	12%	12%	34%
Annual Household Income				
Less than $25,000	16%	13%	9%	11%
$25,000 - $49,999	27%	23%	21%	22%
$50,000 - $74,999	24%	26%	24%	25%
$75,000 - $99,999	18%	21%	23%	24%
$100,000 +	15%	17%	23%	17%
Average (mean)	$63.2	$67.9	$76.1	$70.3
Region of Residence				
New England	5%	5%	5%	7%
Mid-Atlantic	14%	11%	14%	19%
East North Central	17%	15%	13%	15%
West North Central	7%	6%	6%	8%
South Atlantic	18%	13%	20%	16%
East South Central	6%	4%	2%	3%
West South Central	11%	9%	7%	10%
Mountain	7%	10%	8%	5%
Pacific	16%	26%	24%	17%
Market Size (population)				
Under 100,000	19%	16%	13%	18%
100,000 – 499,999	16%	11%	13%	14%
500,000 – 1,999,999	21%	22%	19%	18%
2,000,000 +	44%	51%	56%	50%

***Multiple responses allowed.*
Source: Travel Industry Association of America

TRADITIONALS (16.1 MILLION TRAVELERS)

Traditionals show one of the lowest average travel frequencies compared to the other segments at 4.7 trips in the past year. Only 28 percent take five or more trips per year. These travelers prefer to stay close to home, as most (77%) Traditionals have not taken an international trip in the past three years and more than half (53%) have not taken a trip by air in the past year. Like other segments, most Traditionals have taken only one to four pleasure trips in the past year (70%). Only 23 percent have taken one or more business trips in the past year. Only about one third (36%) of Traditionals claim to have used luxury and/or expensive lodging in the past three years. Yet the majority of Traditionals have used moderately-priced lodging (65%), and cruises are relatively popular with this group (16%). Overall, the Traditionals travel profile is most similar to that of Apathetics and Wishful Thinkers.

Demographic Profile

On average, Traditionals are the oldest of the segments and the most likely to be retired. Also:

- 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 (32%) of Traditionals holds a high school degree or less. Just 35 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 ($53,000). Over half of Traditionals (56%) have annual incomes under $50,000.
- 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.

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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Interestingly, Traditionals are similar to Urban Sophisticates in their very strong belief that quality of customer service is highly influential in their selection of travel companies (86%). Most Traditionals also think accessibility/location has a strong influence on which travel companies they use (82%). This is not surprising given their inclination toward safety and tried-and-true destinations. Similar to Self-indulgents, Traditionals are also very likely to be influenced by the quality of amenities offered (73%) and convenient ways to book or pay for travel (72%).

- Over half of Traditionals (54%) say they are aware of companies that practice to protect the environment of destinations. Like many other segments, Traditionals are most often aware of travel companies that request customers to re-use towels and sheets (35%) and/or use energy efficient lighting and HVAC systems (29%). One in four Traditionals are aware of travel companies that use local vegetation on their grounds (24%), and slightly fewer are aware of companies that recycle (22%).

- Interestingly, Traditionals are slightly more likely than Good Citizens to say they have used travel firms that practice to preserve the environment of destinations (54% vs. 51%). Among Traditionals who are aware of such companies, most have used a travel company that asks customers to re-use towels and sheets (77%). After that, Traditionals' usage drops off to 63 percent for companies that recycle and/or use local vegetation on their grounds.

- Compared to Good Citizens, Traditionals are generally more confident that companies' environmental practices will have an strong impact on preserving the environment of destinations. Traditionals are even more likely than Geo-savvys to believe re-using towels and sheets (37% vs. 33%) will have a strong impact on preserving the environment of destinations. The same is true for offering discounts or upgrades to customers making donations to environment organizations (27% vs. 23%).

- After the three "geotourist" segments, Traditionals have the highest likelihood of choosing a travel company that preserves and protects the environment of destinations even if it costs more. Four in ten (43%) Traditionals say they would be willing to pay more to a travel company that preserves and protects the environment. Actually, Traditionals are more likely than Good Citizens to say they would pay at least five percent more (74% vs. 57%).

Travel Company Selection – Protection and Preservation of Culture and History:

- Traditionals are similar to Good Citizens in that 56 percent are aware of travel companies that preserve the history and culture of destinations through one or more business practices. On specific practices that preserve the history and culture of destinations, Good Citizens awareness levels are generally lower than those of Geo-savvys, Urban Sophisticates, and Good Citizens, as well as those of travelers overall. The highest awareness levels among Traditionals are of companies that use décor reflecting the destination's culture (39%) or that offer local cuisine (39%). Also, one third of Traditionals (36%) say they are aware of travel companies that offer customers a convenient way to buy tickets to local events and performances.

- Companies that practice historic and cultural preservation practices enjoy moderate usage among Traditionals. The majority of those aware of companies offering customers a convenient way to buy event/performances tickets have used such companies (63%). The same is true for companies that offer guided heritage/cultural tours (62%) or that offer local cuisine (61%). Importantly, Traditionals are the most likely of any segment (62%) to claim they have used companies that manage the number of visitors to help preserve historic sites.

- Interestingly, Traditionals are more confident than Good Citizens that most cultural/heritage practices will have an impact on preserving the history and culture of destinations. For some practices, Traditionals' perceived impact is higher than that of even Geo-savvys. Traditionals are much more likely than Geo-savvys to believe that offering customers guided cultural/heritage tours (62% vs. 49%) or donating left-over/unused non-perishable food to local charities (52% vs. 46%) will have a strong impact on preserving the culture of destinations.

- Traditionals are just as likely as Good Citizens to choose travel companies that strive to preserve destinations' culture and heritage (46% vs. 47%), even if they have to pay more. To use such companies, most Traditionals (78%) would pay no higher than a five percent premium.

WISHFUL THINKERS (22.3 MILLION TRAVELERS)

Wishful Thinkers take the fewest trips of all segments, averaging only 4.2 trips in the past year. Most (67%) traveled only one to four times in the past year. Relative to other segments, Wishful Thinkers are inexperienced travelers. Three in four Wishful Thinkers (77%) have not traveled outside the United States in the past three years, and 58 percent have not traveled by air. Wishful Thinkers have taken only about three (3.6) pleasure trips on average in the past year. Only 23 percent of Wishful Thinkers have taken one or more business trips in the past year. Few Wishful thinkers have used luxury accommodations in the past three years (13%); many have used moderately-priced (63%) and/or budget lodging (40%) instead. Given their lower propensity for travel, especially business travel, it is not surprising that only four percent of Wishful Thinkers have flown first- and/or business-class in the past year.

Demographic Profile

Wishful Thinkers are quite young compared to the other segments. Demographically, this segment reflects the working family with many demands on time and finances. Also:

- Wishful Thinkers are about 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 ($53,200). Over half (54%) have household incomes below $50,000 per year.
- 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.

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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Along with Apathetics, Wishful Thinkers have the lowest awareness levels of travel companies' various environmental practices. Over half of Wishful Thinkers (54%) said they were not aware of any travel companies that practiced to preserve the environment of destinations. For Wishful Thinkers who are aware of at least one such company, only about one quarter say they know of companies that ask customers to re-use towels and sheets (27%) or that use energy efficient systems (27%). Wishful Thinkers' awareness levels are even lower for all other environmental practices.

- Like most segments, Wishful Thinkers who are aware of companies that ask customers to re-use linens are highly likely to say they have used such companies (71%). In addition, many of these Wishful Thinkers say they have used companies that use local vegetation (62%) or that manage the number of visitors to help preserve the environment (60%).

- Compared to Good Citizens and even Geo-savvys, Wishful Thinkers have stronger perceptions of the impact of many environmental preservation practices. Wishful Thinkers are much more likely than those two segments to believe that re-using linens will have a strong impact on preserving the destination's environment (43% vs. 36% Good Citizens and 33% Geo-savvys). Relative to these groups, Wishful Thinkers are more likely to think that recycling (52%) and donation of profits to conservation and protection of natural areas (40%) will have a strong impact on the environment of destinations.

- Compared to most other segments, Wishful Thinkers show a much lower willingness to pay more to use companies that preserve and protect the environment (33%). Only Apathetics and Self-indulgents scored lower than Wishful Thinkers on this measure. Yet Wishful Thinkers who would pay more are fairly likely to pay at least five percent more to use such companies (66%).

Travel Company Selection – Protection and Preservation of Culture and History:

- Nearly half (47%) of Wishful Thinkers are not aware of any travel companies that practice to preserve the history and culture of destinations. Like Traditionals, Wishful Thinkers are not as likely as the three "geo-tourist" segments to be aware of specific practices such as using décor reflecting the local culture and offering local cuisine. Still, these two company practices garnered the highest awareness among Wishful Thinkers compared to other practices (40% and 38%, respectively).

- Compared to the other segments, Wishful Thinkers generally fall in the middle on usage of travel companies with specific cultural/heritage preservation practices. Wishful Thinkers show the highest usage of companies that offer local cuisine (55%), provide printed materials/videos on the destination's culture (54%), and donate profits to the preservation of historic sites (52%).

- When it comes to the impact on destinations of some historic/cultural preservation practices, the younger Wishful Thinkers are more optimistic than the older Good Citizens. For example, Wishful Thinkers are more likely than Good Citizens to perceive these practices will have a strong impact: offering local cuisine (45% vs. 40%), managing the number of visitors to historic sites (38% vs. 33%), supporting community beautification projects (46% vs. 37%), and donating unused food to local charities (45% vs. 38%).

- Only one third (33%) of Wishful Thinkers say they would select a travel company that preserves and protects the history and culture of destinations, even if they had to pay more. The majority (64%) of Wishful Thinkers who would pay this premium say they would pay at least five percent more.

APATHETICS (19.9 MILLION TRAVELERS)

Taking an average of 4.9 trips in the past year, Apathetics travel only slightly more than Traditionals. Like the Traditionals, Apathetics prefer to stay close to home. Most (83%) Apathetics have not taken an international trip in the past three years and half (50%) have not taken a trip by air in the past year. The majority of Apathetics (70%) have not traveled for business in the past year. Interestingly, Apathetics have the lowest propensity of all the segments to have used budget accommodations (37%) in the past three years, opting for moderate (66%) or expensive lodging (40%) instead. Very few Apathetics have used the higher classes of air service in the past year.

Demographic Profile

Apathetics demographic profile reflects middle-class America. In addition:

- 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.
- One in five (19%) lives in the East North Central region.
- Many Apathetics (41%) live in large cities or urban areas, but one quarter live in mid-size cities of 500,000 to 2 million in population.

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%). Apathetics are less likely to 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 (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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Given their ambivalent attitudes, it is not surprising that Apathetics have the lowest (41%) awareness of any travel companies that practice to preserve the environment of destinations. Compared to all other geotourism segments, Apathetics are the least likely to be aware of companies with specific practices such as using energy efficient systems, recycling, using local plants and vegetation, and using environmentally-friendly cleaning products.

- Only 41 percent of Apathetics say they have used travel companies that protect the environment in some way, the lowest share of the segments. Apathetics that have used such companies are most likely to say the companies use energy efficient systems (73%), offer customers discounts or upgrades in exchange for a donation to a local environmental organization (73%), or ask customers to re-use towels and sheets (72%).

- Similar to Self-indulgents, Apathetics are generally skeptical that travel companies' environmental practices will actually have an impact on protecting the environment. Not even half of Apathetics (46%) think energy efficiency measures will have a strong impact. Even fewer believe the widespread practices of recycling (38%) and asking customers to re-use linens (28%) will have a strong impact on preserving the environment of destinations.

- The majority of Apathetics (76%) say they would not choose a travel company that protects and preserves the environment, even if they had to pay more.

Travel Company Selection – Protection and Preservation of Culture and History:

- Compared to the other segments, Apathetics are the least likely to say they are aware of companies that preserve the culture and heritage of destinations (43%). Among Apathetics who are aware of these travel firms, the practices garnering the highest awareness are using décor reflecting the local culture (29%) and offering local cuisine (28%).

- Usage of travel companies that strive to preserve the history and culture of destinations is also low among Apathetics. The small proportion using such firms are most likely to say they used companies that offer customers discounts or upgrades in exchange for a donation to a local charity (71%), offer employees opportunities for career advancement (70%), and offer a convenient way to purchase local event/performance tickets (70%).

- Apathetics generally have low perceptions of the impact these practices will have on preserving the history and culture of destinations. In this respect, they are most similar to Self-indulgents.

- As most Apathetics would not pay more to use a company that strives to preserve the environment of destinations, most would not pay more for companies that preserve the destination's history and culture (75%).

GEOTOURISM SEGMENT CHARACTERISTICS
Table 3

GEOTOURISM SEGMENT CHARACTERISTICS Base = millions of U.S. adults	Total Travelers	Tradition-als	Wishful Thinkers	Apa-thetics
	154.0	16.1	22.3	19.9
Travel Frequency-Past 3 Years				
1-4 trips	36%	42%	49%	41%
5+ trips	64%	58%	51%	59%
Avg. no. of trips (excl. 0)	11.7	9.4	8.6	10.4
1+ trips outside the U.S.	29%	23%	23%	17%
Travel Frequency Past Year				
No trips in past year	6%	10%	8%	7%
1-4 trips	60%	62%	67%	64%
5+ trips	34%	28%	24%	29%
Avg. no. of trips (excl. 0)	5.7	4.7	4.2	4.9
Pleasure Travel Frequency Past Year				
No pleasure trips in past year	10%	11%	10%	10%
1-4 pleasure trips	67%	70%	71%	68%
5+ pleasure trips	23%	18%	19%	21%
Avg. no. of pleasure trips (excl. 0)	4.3	3.9	3.6	3.7
Business Travel Frequency Past Year				
No business trips in past year	68%	77%	77%	70%
1-4 business trips	25%	18%	19%	25%
5+ business trips	7%	5%	4%	5%
Avg. no. of business trips (excl. 0)	4.5	3.6	2.9	4.4
Air Travel Frequency Past Year				
No trips by air in the past year	47%	53%	58%	50%
1-4 air trips	46%	44%	38%	46%
5+ air trips	7%	3%	4%	4%
Avg. no. of air trips	3.1	2.2	2.4	2.2
Paid Lodging Use in Past Year				
No paid lodging trips in the past year	16%	10%	16%	20%
1-4 paid lodging trips	66%	61%	65%	67%
5+ paid lodging trips	18%	29%	19%	14%
Avg. no. of paid lodging trips	3.8	3.3	2.7	3.6
Type of Paid Lodging Used in Past Three Years On Pleasure Trips *				
Luxury hotel on pleasure trip	14%	9%	13%	11%
Expensive hotel on pleasure trip	41%	27%	25%	40%
Moderate hotel on pleasure trip	66%	65%	63%	66%
Budget hotel on pleasure trip	48%	52%	40%	37%
Rental condo/home on pleasure trip	21%	13%	24%	16%
Bed & breakfast on pleasure trip	12%	12%	6%	8%
Owned condo/home on pleasure trip	11%	13%	10%	10%
Cruise	13%	17%	8%	12%
Transportation Used in Past Year On Pleasure Trips *				
Personal Car/Truck	63%	63%	60%	59%
Coach Class Air	32%	27%	25%	29%
Rental Car	17%	15%	12%	14%
Motorcoach/Bus	6%	9%	3%	5%
Business Class Air	2%	*	2%	2%
First Class Air	3%	1%	2%	2%
Inter-City Train	3%	4%	1%	1%
RV	3%	3%	1%	2%

**Multiple responses allowed.*
Source: Travel Industry Association of America

GEOTOURISM SEGMENT CHARACTERISTICS
Table 3, continued

GEOTOURISM SEGMENT CHARACTERISTICS	Total Travelers	Tradition-als	Wishful Thinkers	Apa-thetics
Base = millions of U.S. adults	154.0	16.1	22.3	19.9
Gender				
Male	48%	39%	48%	51%
Female	52%	61%	52%	49%
Age				
18-24	11%	2%	32%	12%
25-34	19%	9%	34%	15%
35-44	24%	14%	19%	25%
45-54	19%	16%	10%	19%
55+	27%	59%	5%	29%
Average (mean)	44.7	57.9	32.3	45.8
Marital Status				
Married	73%	69%	69%	76%
Never married	13%	11%	18%	12%
Divorced, Widowed, Separated	14%	21%	13%	12%
Children in Household	41%	24%	48%	42%
Education				
High School or less	22%	32%	35%	29%
Some college	32%	32%	40%	34%
Completed College	24%	21%	19%	24%
Post-graduate	21%	14%	6%	13%
Employment				
Full-time	57%	33%	67%	54%
Part-time	12%	10%	14%	13%
Unemployed/Homemaker/Other	15%	15%	16%	16%
Retired	16%	42%	3%	17%
Annual Household Income				
Less than $25,000	16%	26%	22%	11%
$25,000 - $49,999	27%	30%	32%	29%
$50,000 - $74,999	24%	21%	23%	27%
$75,000 - $99,999	18%	11%	14%	20%
$100,000 +	15%	12%	9%	13%
Average (mean)	$63.2	$53.0	$53.2	$63.8
Region of Residence				
New England	5%	2%	6%	7%
Mid-Atlantic	14%	16%	15%	15%
East North Central	17%	18%	18%	19%
West North Central	7%	7%	5%	10%
South Atlantic	18%	23%	19%	17%
East South Central	6%	7%	7%	7%
West South Central	11%	10%	13%	10%
Mountain	7%	5%	6%	5%
Pacific	16%	13%	12%	10%
Market Size (population)				
Under 100,000	19%	13%	28%	18%
100,000 – 499,999	16%	13%	16%	17%
500,000 – 1,999,999	21%	18%	22%	24%
2,000,000 +	44%	56%	34%	41%

***Multiple responses allowed.*
Source: Travel Industry Association of America

OUTDOOR SPORTSMEN (21.0 MILLION TRAVELERS)

While Outdoor Sportsmen take five trips per year on average, they are not sophisticated in their travel habits. Compared to other travelers, they are the least likely to have traveled internationally (13%). Only 30 percent of Outdoor Sportsmen have taken an air trip in the past year, the lowest of all the segments. Three in four (74%) Outdoor Sportsmen have not traveled recently for business. Instead, these travelers opt for travel in the U.S. using their own car or truck (70%). In fact, Outdoor Sportsmen have the one of the highest propensities to have used a recreational vehicle in the past year (7%). These travelers have used budget accommodations more often in the past three years compared to the other segments.

Demographic Profile

As the name indicates, Outdoor Sportsmen are overwhelming male who likely head working-class family households. In addition:

- 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.

- 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 (31%). Another one third (33%) live in large urban areas.

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. Additionally, 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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Outdoor Sportsmen are similar to Self-indulgents in their overall awareness of travel firms that practice to preserve the environment of destinations (54% vs. 52%). Yet for several specific company practices, Outdoor Sportsmen are just as aware as Good Citizens. In fact, Outdoor Sportsmen are more likely than Good Citizens to be aware of travel firms that use energy efficient systems (35% vs. 32%) or use environmentally-friendly cleaning products (24% vs. 19%).

- Outdoor Sportsmen that are aware of environmentally responsible travel companies are most likely to have used those that ask customers to re-use linens (71%), recycle (66%), and/or use energy efficient systems. For other environmental practices, usage among Outdoor Sportsmen is the lowest among the segments.

- Similar in their love of the outdoors, Outdoor Sportsmen rival Geo-savvys in the belief that these practices will have a strong impact on protecting the environment of destinations. In fact, Outdoor Sportsmen are much more likely than other segments, except Urban Sophisticates, to think that these practices will have a strong impact on preserving the environment: using energy efficient systems (57%), recycling (57%), donating profits to conservation/management of natural areas (48%), and displaying environmental policies publicly (36%).

- Despite these beliefs, only one in three (34%) Outdoor Sportsmen would pay a premium to use a travel company that practiced to preserve the environment. The majority of those who would pay such a premium (80%) are only willing to pay five percent more at most.

Travel Company Selection – Protection and Preservation of Culture and History:

- Outdoor Sportsmen are about average when it comes to awareness of companies that practice to preserve the history and culture of destinations. Interestingly, Outdoor Sportsmen are particularly likely to say they are aware of companies that provide local residents with career advancement opportunities (25%). This is similar to the higher awareness of Geo-savvys (26%) and Urban Sophisticates (27%) on this measure.

- Similar to Wishful Thinkers, Outdoor Sportsmen who are aware of companies with historic/cultural preservation practices are generally the least likely to have used such companies. For example, Outdoor Sportsmen are the least likely to have used companies that manage the number of visitors to help protect historic sites (35%), that offer customers guided heritage/cultural tours of the destination (34%), or that offer customers discounts or upgrades in exchange for a local charity donation (18%). While Outdoor Sportsmen are particularly aware of companies that provide local residents with career advancement opportunities, they are the least likely to say they have used such companies (40%).

- For many historic/cultural preservation practices, Outdoor Sportsmen are more likely than Self-indulgents to think these practices will have a strong impact. Outdoor Sportsmen are most likely to think that offering a convenient way to purchase local event/performance tickets and offering guided cultural/heritage tours of the destination will have a strong impact on preserving the history and culture of destinations.

- About one third (34%) of Outdoor Sportsmen would select a travel company that preserves the history and culture of destinations, even if they had to pay more to use such a firm. This proportion is similar to that of Wishful Thinkers, but lower than those of the geotourist segments. Most (79%) of the Outdoor Sportsmen who would pay more to use such companies would pay a premium of five percent or less.

SELF-INDULGENTS (19.9 MILLION TRAVELERS)

Opposite of Outdoor Sportsmen, Self-indulgents are quite sophisticated in their travel preferences. They travel frequently, taking an average of six trips in the past year. Like Geo-savvys, four in ten (43%) Self-indulgents take five or more trips per year. One in three (35%) has traveled internationally at least once in the past three years, a relatively high incidence compared to Outdoor Sportsmen, Traditionals, Apathetics, and Wishful Thinkers. Along with Urban Sophisticates and Geo-savvys, Self-indulgents have a relatively high average annual number of pleasure trips (4.5). Self-indulgents have a relatively high tendency toward business travel, as 41 percent have taken at least one business trip in the past year. Given their propensity to travel for both leisure and business, it is not surprising that six in ten (58%) Self-indulgents have taken at least one trip by air in the past year. When it comes to accommodations, Self-indulgents have earned this segment name. A full 70 percent have used luxury and/or expensive accommodations in the past three years. Self-indulgents also have a high propensity for using rental cars compared to other segments (24%). On the other hand, Self-indulgents are not very likely to indulge in first- and/or business-class airline tickets.

Demographic Profile

Like Urban Sophisticates, Self-indulgents tend to be affluent baby boomers, some of whom are still raising families. Furthermore:

- 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%). Women in the Self-indulgents segment 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 25 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 ($68,500), with 39 percent having annual household incomes above $75,000.

- 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.

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 tend to be below average in their interest in culturally or environmentally-oriented travel and community-based activities. What really distinguishes this group is a general lack of cultural and environmental awareness and sensitivity and, in some cases, 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%). In addition, 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%).

Travel Company Selection – Protection and Preservation of the Environment:

- Self-indulgents are about average when it comes to awareness of travel companies that protect the environment of destinations (52%). The companies of which they are most aware include those that request customers to re-use linens (37%) and those that use energy efficient systems (29%).

- While Self-indulgents are somewhat aware of companies that request customers to re-use linens, they are the least likely of all the segments to have used such companies. Still two thirds (67%) have used companies that ask customers to re-use linens. Many Self-indulgents say that they have used companies that use local plants and vegetation on their grounds (62%).

- Self-indulgents are generally not convinced that travel companies' environmental preservation practices will have a strong impact on destinations. Few think that asking customers to re-use linens will have an impact (12%). In comparison, Self-indulgents are more likely to think that energy-efficiency measures (35%) or recycling (26%) will have a strong impact. For the impact of other practices, Self-indulgents' perceptions are generally the lowest among the segments.

- Only 20 percent of Self-indulgents would choose a travel company that strives to protect the environment of destinations, even if it costs more. Yet most (75%) who would pay more to use such companies would be willing pay a premium of five percent or higher.

Travel Company Selection – Protection and Preservation of Culture and History:

- Over half of Self-indulgents say they are aware of at least one company that practices to preserve the history and culture of destinations (54%). Self-indulgents are similar to other segments in that they show the highest awareness of companies that use décor reflecting the local culture (41%) or that offer local cuisine (39%). Self-indulgents' awareness levels are close to the average for most other historic/cultural preservation practices.

- Compared to other segments, "aware" Self-indulgents are among the most likely to have actually used companies that use décor reflecting the local culture (64%) or that offer local cuisine (63%). In addition, Self-indulgents are even more likely than Urban Sophisticates or Geo-savvys to have used companies that support community beautification projects.

- As with environmental preservation practices, Self-indulgents also have fairly low perceptions of the impacts of historic/cultural preservation practices. In this way, Self-indulgents are most similar to Apathetics. When comparing perceptions of these practices, Self-indulgents are most likely to say that offering a convenient way to purchase local event tickets (39%) will have a strong impact on preserving the culture of destinations.

- Relatively few (20%) Self-indulgents are willing to pay more to use a travel company that preserves and protects the history and culture of destinations. Most (76%) Self-indulgents who are willing to pay more would not pay more than a five percent premium to use such travel firms.

GEOTOURISM SEGMENT CHARACTERISTICS
Table 4

GEOTOURISM SEGMENT CHARACTERISTICS Base = millions of U.S. adults	Total Travelers	Outdoor Sports-men	Self-Indul-gents
Base = millions of U.S. adults	154.0	21.0	19.9
Travel Frequency-Past 3 Years			
1-4 trips	36%	42%	28%
5+ trips	64%	58%	72%
Avg. no. of trips (excl. 0)	11.7	11.0	12.5
1+ trips outside the U.S.	29%	13%	35%
Travel Frequency Past Year			
No trips in past year	6%	7%	5%
1-4 trips	60%	64%	52%
5+ trips	34%	29%	43%
Avg. no. of trips (excl. 0)	5.7	5.4	6.0
Pleasure Travel Frequency Past Year			
No pleasure trips in past year	10%	10%	8%
1-4 pleasure trips	67%	69%	63%
5+ pleasure trips	23%	21%	28%
Avg. no. of pleasure trips (excl. 0)	4.3	4.1	4.5
Business Travel Frequency Past Year			
No business trips in past year	68%	74%	59%
1-4 business trips	25%	19%	32%
5+ business trips	7%	7%	9%
Avg. no. of business trips (excl. 0)	4.5	5.2	3.8
Air Travel Frequency Past Year			
No trips by air in the past year	47%	70%	42%
1-4 air trips	46%	27%	48%
5+ air trips	7%	3%	10%
Avg. no. of air trips	3.1	3.1	3.0
Paid Lodging Use in Past Year			
No paid lodging trips in the past year	16%	14%	24%
1-4 paid lodging trips	66%	70%	66%
5+ paid lodging trips	18%	16%	10%
Avg. no. of paid lodging trips	3.8	3.5	3.8
Type of Paid Lodging Used in Past Three Years On Pleasure Trips*			
Luxury hotel on pleasure trip	14%	8%	17%
Expensive hotel on pleasure trip	41%	31%	53%
Moderate hotel on pleasure trip	66%	53%	69%
Budget hotel on pleasure trip	48%	62%	42%
Rental condo/home on pleasure trip	21%	25%	19%
Bed & breakfast on pleasure trip	12%	6%	15%
Owned condo/home on pleasure trip	11%	10%	11%
Cruise	13%	6%	14%
Transportation Used in Past Year On Pleasure Trips*			
Personal Car/Truck	63%	70%	63%
Coach Class Air	32%	16%	39%
Rental Car	17%	10%	24%
Motorcoach/Bus	6%	3%	7%
Business Class Air	2%	1%	1%
First Class Air	3%	*	2%
Inter-City Train	3%	1%	2%
RV	3%	7%	*

**Multiple responses allowed.*
Source: Travel Industry Association of America

GEOTOURISM SEGMENT CHARACTERISTICS
Table 4, continued

GEOTOURISM SEGMENT CHARACTERISTICS Base = millions of U.S. adults	Total Travelers	Outdoor Sports-men	Self-Indul-gents
Base = millions of U.S. adults	154.0	21.0	19.9
Gender			
Male	48%	61%	50%
Female	52%	39%	50%
Age			
18-24	11%	11%	6%
25-34	19%	20%	26%
35-44	24%	36%	25%
45-54	19%	18%	24%
55+	27%	15%	19%
Average (mean)	44.7	41.0	42.8
Marital Status			
Married	73%	79%	78%
Never married	13%	7%	12%
Divorced, Widowed, Separated	14%	14%	10%
Children in Household	41%	60%	47%
Education			
High School or less	22%	36%	13%
Some college	32%	34%	29%
Completed College	24%	18%	33%
Post-graduate	21%	13%	25%
Employment			
Full-time	57%	62%	66%
Part-time	12%	12%	13%
Unemployed/Homemaker/Other	15%	16%	12%
Retired	16%	10%	9%
Annual Household Income			
Less than $25,000	16%	22%	13%
$25,000 - $49,999	27%	33%	23%
$50,000 - $74,999	24%	22%	26%
$75,000 - $99,999	18%	12%	20%
$100,000 +	15%	11%	19%
Average (mean)	$63.2	$53.8	$68.5
Region of Residence			
New England	5%	3%	4%
Mid-Atlantic	14%	13%	11%
East North Central	17%	19%	16%
West North Central	7%	10%	7%
South Atlantic	18%	14%	20%
East South Central	6%	7%	8%
West South Central	11%	13%	14%
Mountain	7%	8%	6%
Pacific	16%	14%	16%
Market Size (population)			
Under 100,000	19%	31%	14%
100,000 – 499,999	16%	18%	21%
500,000 – 1,999,999	21%	18%	25%
2,000,000 +	44%	33%	40%

**Multiple responses allowed.*
Source: Travel Industry Association of America

APPENDIX

METHODOLOGY

NFO Research, the largest and most reputable consumer household panel research company in the United States, collected the data for The Geotourism Study for *National Geographic Traveler* and the Travel Industry Association of America. Phase I of 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 adult households balanced to represent the national age, region, and income demographics of American adults. In addition, each survey was directed to either the male or female head of household, to ensure the gender split would be representative of the U.S. adult population.

Questionnaires were mailed to 8,000 representative adult households, and a total of 4,300 questionnaires were returned yielding a 54 percent response rate. 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. To categorize respondents into geotourism segments, cluster and factor analysis statistical techniques were used. Upon completion of the statistical segmentations process, eight distinct geotourism segments were identified.

Phase II of the study was conducted among the 3,300 respondents from Phase I who had traveled at least once in the past-three years. NFO identified 2,467 reachable respondents from the Phase I respondent sample. Thus, Phase II questionnaires were mailed to 2,467 Phase I respondents. A total of 1,651 surveys were returned for a 67 percent response rate. Survey results were then weighted to reflect the demographics of the Phase I traveler sample, as well as the geotourism segment shares identified in Phase I. Results from this sample were again projected to the entire U.S. adult population and have a statistical error range of +/- 3 percentage points.

The NFO consumer panel has more than 550,000 households representing over 1.2 million people nationwide (or one in every 182 U.S. households) – the largest consumer panel in the industry. So that samples are representative of all U.S. households, the panel is selected to match the U.S. census population on five variables: census division of residence, market size of residence, age of household head, household income, and household size.