

Part I: A Portrait of the American Traveler: Focused on Family and Value

HSMIAI University recently hosted Ypartnership's Gregg Dunn, executive vice president/consumer insights and brand strategy, who painted a *Portrait of the American Traveler*. The portrait took shape based on data from the company's survey of 2,539 active U.S. leisure travelers, 18 and older with an annual income of more than \$50,000. The survey was conducted online during February and March 2011.

The picture Dunn painted of the American Traveler was very detailed and reflected a common theme – today's U.S. traveler has reinvented him/herself to become much more savvy in the buying process and is focused on family and value.

Focus on value

The economic downturn, Dunn says, created the Quintessential American, who has become "more autonomous, resourceful and self-reliant." This is reflected not only in how they shop in their everyday life but also in how they shop for travel. They are looking for more information and taking more control of the buying process.

A startling statistic—and one that every hotelier must heed—Dunn says, is that 89% chose "value for the price" and "room rate" as the most influential drivers of accommodation choice. "When things were different, previous experience and a hotel's reputation came before price and room rate. Now, people are looking at price first and everything else comes second."

Focus on family

In gauging respondents' economic attitudes, 82% want to "focus on things that matter most in my life" and 77% want to be "closer to my family." Both traits are reflected in an increase in family travel.

Of the types of leisure trips taken, 42% were family vacations, with heavy sway toward outdoor destinations (44%) like the beach and camping, which has grown in the survey's popularity over the past few years. When asked to define their quintessential vacation, 80% chose beach destinations, closely followed by hotels with special rates for kids (75%).

Similar to years past, the survey found the typical leisure traveler takes about four trips per year and spends about \$4,500, so hoteliers must compete for a limited share of the travelers' time. While the majority (80%) stayed in a hotel on those trips, an interesting statistic, Dunn says, are the 33% who stayed in a private residence and the 17% who rented a home or condominium. That feeling of home away from home and the ability to save on meals and activities are likely drivers of those statistics.

Multigenerational travel also continues to grow, with 32% saying that they have taken at least one trip with grandchildren in past 12 months. "This indicates that on the supply side, something needs to be done to appeal to multigenerational travel," Dunn says.

Obstacles

The survey shows signs of stabilization, with 63% saying they will travel the same as in the past. The good news is 11% said they will take more trips. There are obstacles, however, that may put a damper on travel: budget concerns and discretionary income (48%), gas prices too high (43%) and airfare too expensive (41%). Travelers may rethink destinations and opt for trips closer to home, which is important for hotels as they craft their marketing.

Next Week: Part 2, The Future: trends that will shape how the hotel industry will sell to and attract customers.

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