

TIA/BTS Travel Confidence Survey Results

(updated January 9, 2001)

For survey conducted
among American consumers on
December 9-10, 2001

**Prepared by
The Research Department of the
Travel Industry Association of America
Washington, D.C.**



***Travel Industry Association
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**Sponsored by
Bureau of Transportation Statistics
U.S. Department of Transportation
Washington, D.C.**

Introduction

As part of its industry recovery efforts, TIA has been conducting a series of consumer surveys to measure consumer attitudes and travel response to the tragedies of September 11. The purpose of this report is to summarize survey findings from the fourth wave of the TIA/BTS Travel Confidence Survey. The U.S. Bureau of Transportation Statistics (BTS) supported this fourth survey. The TIA/BTS Travel Confidence Surveys are conducted among representative samples of 1,000 American adults. This summary report describes results from the fourth Travel Confidence Survey, conducted December 9-10, 2001. Earlier Travel Confidence Surveys were conducted September 21-22, October 12-13, and November 2-4, 2001. This report will reference results from these earlier surveys as well as those from the most recent survey. Due to continued support by the U.S. Bureau of Transportation Statistics, TIA will continue the survey in 2002 to track results.

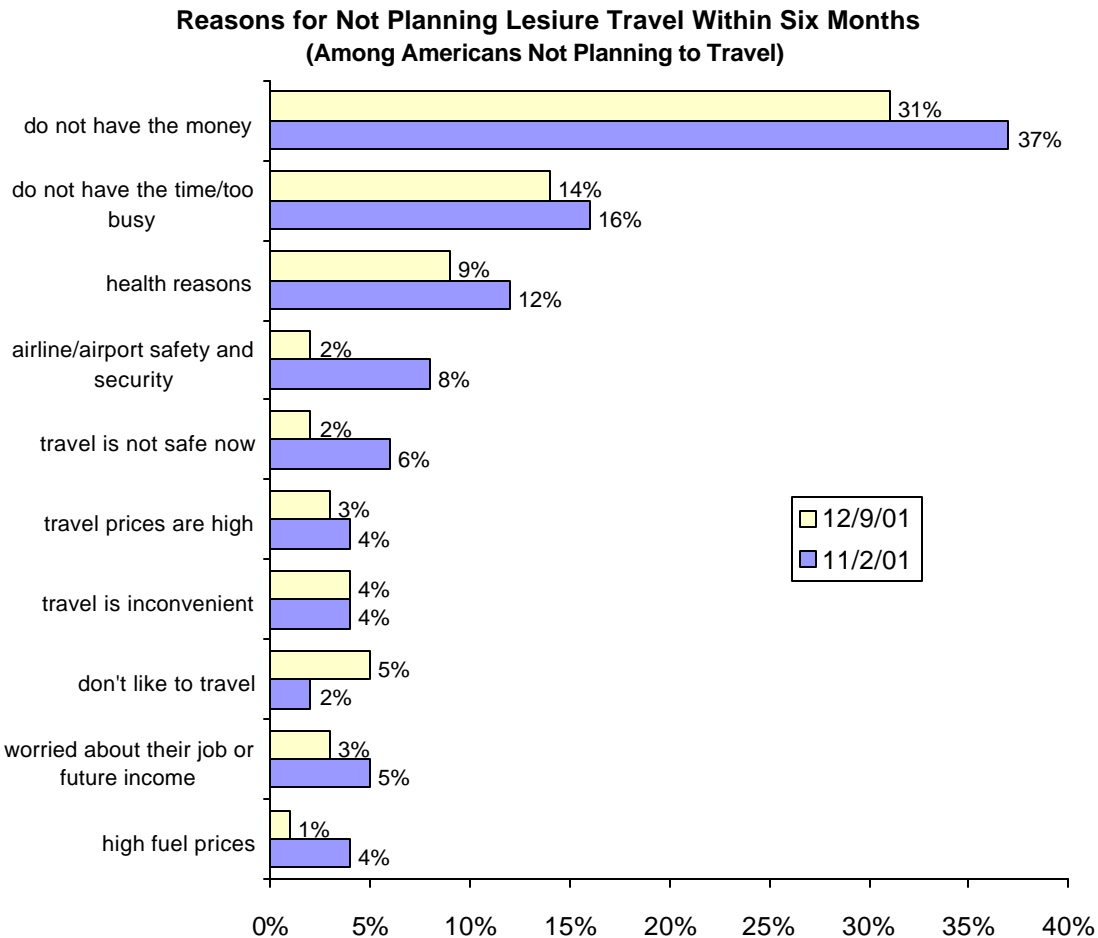
Full results in tabular format are available by calling TIA's Research Department at 202-408-2160.

Detailed Findings For All Americans

Intentions to travel for leisure within six months

The number of consumers claiming to have travel plans sometime in the upcoming six months has dropped slightly since the November survey. Now, 57 percent of Americans say they are planning to take at least one leisure trip within the next six months, down from 62 percent. This equates to an estimated 118 million American adults now planning to travel. For the 43 percent who do not plan to travel over the next six months, or who are not sure, financial concerns (31%) and lack of time (14%) continue to be the primary reasons for not planning a trip. The number citing concerns about finances, however, declined significantly compared to the November. Additionally, 3 percent of those not planning to travel cite concerns about their job or future income.

Concerns about the safety of travel have abated since the Travel Confidence Survey conducted in November. Safety and security are issues for just 4 percent of those who are not planning to travel, down significantly compared to the November survey (14%). Other reasons for not planning travel include health (9%), inconvenience (4%), and high travel prices (3%).



Travel behavior and intentions compared to same period last year

The Travel Confidence Survey also measures consumer travel behavior at the same time last year and compares this behavior with intentions for the next six months. Over half of Americans (54%) claim that they took a leisure trip last year sometime between November 2000 and April 2001. Yet whether or not consumers traveled last year at the same time, most (76%) say they now intend to travel at least the same amount or more compared to the same period last year. This is slightly lower compared to the November survey (81%). Still, only 20 percent say they plan to travel less. Reasons given for traveling less over the next six months mirror reasons given by those who are not planning to travel at all. For example, one fourth (30%) of those who claim they will travel less cite financial concerns. Others say they do not have the time available (14%). Interestingly, safety and security issues are of slightly higher concern for this group compared to those who will not travel at all (13% vs. 4%). Inconvenience is still much more of an issue for those traveling less (8%) than for those not traveling at all (4%).

Potential travel motivators for those not planning to travel over the next six months

For consumers who are not planning leisure trips within the next six months, what might motivate them to travel? Not surprisingly, over one-third of these consumers (37%) say that better economic conditions would encourage them to take a trip after all. For many of these consumers, marketing and promotion by the travel industry would influence them to travel. One third (33%) mention hotel discounts or offers and three in ten (29%) mention airline discounts as potential travel motivators. Many (31%) could be motivated by attractive discounts to travel within their home state. Some consumers not planning to travel say they that improved airline/airport security might make them travel after all (19%). Tax credits or deductions for personal travel might influence 26 percent to take a trip, compared to only 18% in the previous survey.

Travel motivators for those who are planning to travel less or the same compared to the same six-month period last year

Questions were asked of consumers who already have leisure travel plans to determine what would motivate them to travel *more* compared to the same period last year. Responses among this group are somewhat higher compared to those not planning travel. Many (60%) of these travel planners say that better economic conditions would motivate them to travel even more. This figure has jumped from the November survey, in which 53 percent of travel planners mentioned better economic conditions. Attractive offers or discounts for airlines (57%), hotels (58%), and home-state travel (45%) are likely to influence these consumers to travel more than they are currently planning. Tax credits or deductions for personal travel would influence 45 percent of these Americans to travel more, relatively unchanged from the previous survey. Improved airport/airline security would influence 42 percent to travel more than they are currently planning.

Likelihood of using various modes of transportation for leisure trips in first half of this year compared to first half of last year

Past-year travelers who are also planning upcoming leisure travel were asked about their likelihood of using several forms of transportation in the first half of 2002, compared to their use during the same period last year. Auto travel has always been the most popular form of leisure transportation, and the Travel Confidence Survey suggests it will see increased popularity. The survey shows that more than one-third (37%) say they are more likely to use their own car for travel during the first half of 2002. Few (12%) say they are less likely to use their own car when traveling in the upcoming months. As for air transportation, travel planners more often say they are less likely to travel by air (31%) than say they are *more* likely to travel by air (21%). The same is true for plans to rent a car, with only 10 percent more likely to rent a car and 45 percent less likely to rent a car.

**Travel Confidence
Survey, 12/11/01**

More likely to....

Drive own vehicle	37%
Use air transportation	21%
Drive a rented car	10%
Use train transportation	5%
Use bus transportation	4%

Less likely to....

Drive own vehicle	12%
Use air transportation	31%
Drive a rented car	45%
Use train transportation	50%
Use bus transportation	54%

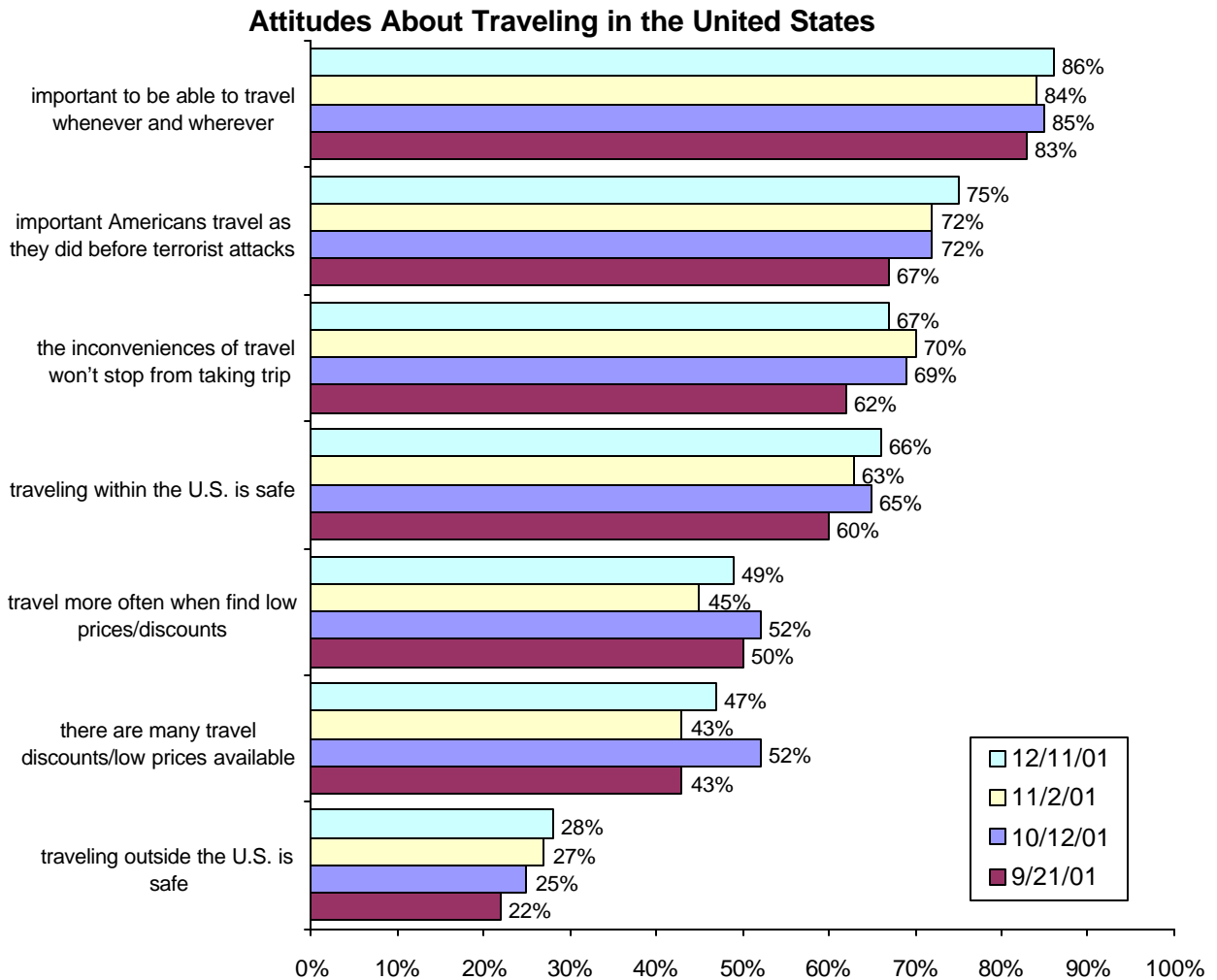
As likely to...

Drive own vehicle	49%
Use air transportation	44%
Drive a rented car	40%
Use train transportation	38%
Use bus transportation	33%

**Note: may not add to 100%
due to rounding*

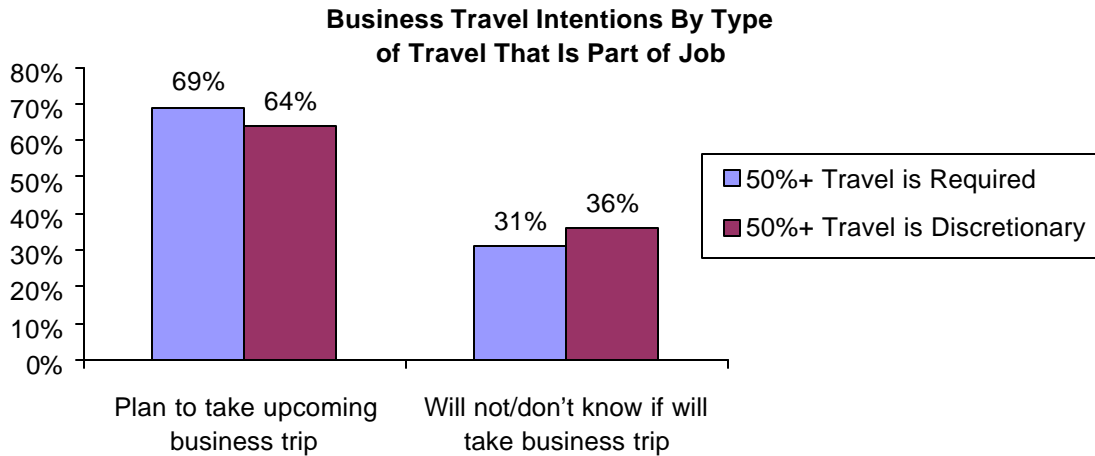
Consumers' general attitudes toward travel

The most recent wave of the Travel Confidence Survey shows increasing consumer confidence in traveling in the United States. Most consumers (86%) continue to agree that it is important to be able to travel whenever and wherever they want to. Most Americans (75%) also feel it is important to travel as they did before the terrorist attacks in the U.S. occurred. When it comes to the safety of travel in the United States, consumers are increasingly positive. Two thirds of consumers (66%) agree that traveling within the U.S. is safe, slightly higher than the previous survey conducted in November (63%). While fewer consumers agree that it is safe to travel *outside* the U.S., perceptions on this topic have also steadily improved. Most other consumer attitudes measured in the Travel Confidence Survey are also unchanged since the last survey.



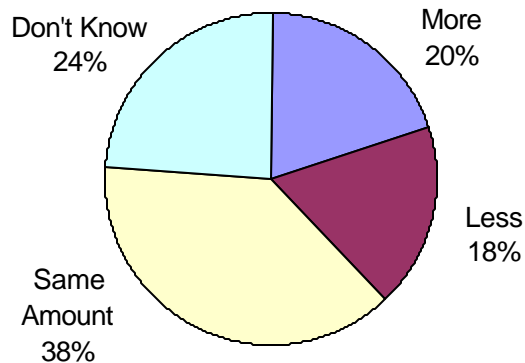
Business travel expectations within next six months

New questions were added to the December survey to determine consumers' business travel expectations. Out of employed adults (70% of adult population), 40 percent claim they have a job that at least occasionally involves trips of 50 miles or more, one way, to conduct business. This translates to 28 percent of all U.S. adults. Of this group, 57 percent say that one-half or more of their business trips are a required part of the job. Fewer (50%) say that one-half or more of their business trips are discretionary. This is important to note, because intentions to take an upcoming business do not differ much regardless of whether most travel is required or whether most of it is discretionary.



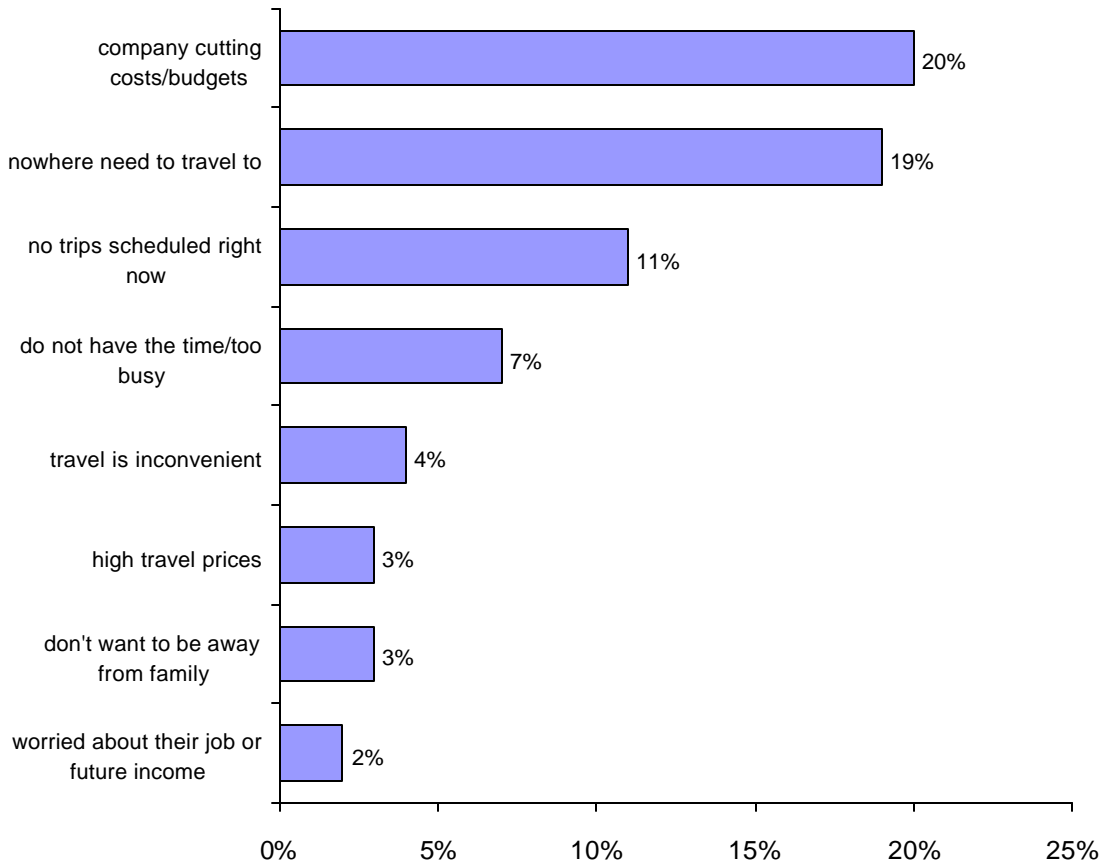
Of those adults who have a job involving at least some travel (28%), 63 percent said they took a business trip in the first half of 2001 and two thirds think they will be taking a business trip in the first half of 2002. Also among this group, over half (58%) say they will travel the same amount or more for business in the first half of this year.

**Plan to Travel For Business in First Half 2002
Compared to First Half 2001**



Among Americans who have a job involving at least some travel, some do not think they will travel for business in the next six months (33%). One in five of these consumers cite budget cuts as a reason (20%). (Budget cuts in this survey refer to general company cost-cutting and/or cuts in travel or conference/training budgets.) Other workers (19%) simply say that there is nowhere they need to travel to in the next six months, or that they don't have anything scheduled right now (11%). A few workers (7%) also say that they are too busy at work to take business trips. Very few of these workers mention the inconvenience of travel (4%) or travel/air safety (1%) as reasons for not taking business trips.

**Reasons for Not Planning Business Travel Within Six Months
(Among Workers Not Planning to Travel For Business)**



Note: Multiple responses allowed

Likelihood of using various modes of transportation for business trips in first half of 2002 compared to first half of 2001

Business travelers who are planning upcoming business trips were asked about their likelihood of using several forms of transportation in the first half of 2002, compared to their use during the same period last year. Most of these business travelers (77%) say they are as likely or more likely to use air transportation on upcoming business trips. Only one in five say they are *less* likely to use air transportation. As for rental car use, 65 percent of business travelers say they are as likely or more likely to rent a car for upcoming business trips, compared to the first half of last year. Auto travel in an owned vehicle is also popular for business trips, and may become more so. One in four (26%) business travelers say they are more likely to drive their own vehicle for a business trip over the next six months. Many (61%) plan to use their own car about the same amount as in the first half of 2001. Few (12%) say they are less likely to use their own car.

Travel Confidence
Survey, 12/11/01

More likely to....

Drive own vehicle	26%
Use air transportation	20%
Drive a rented car	10%
Use train transportation	7%
Use bus transportation	2%

Less likely to....

Drive own vehicle	12%
Use air transportation	20%
Drive a rented car	28%
Use train transportation	37%
Use bus transportation	43%

As likely to...

Drive own vehicle	61%
Use air transportation	57%
Drive a rented car	55%
Use train transportation	47%
Use bus transportation	43%

**Note: may not add to 100%
due to rounding*

Business travel policies in existence at company/firm

Workers who at least occasionally travel for business were asked about policies their companies may or not currently have regarding business travel. Interestingly, the majority of workers (85%) say their company does indeed have one or more business travel policies in place. Among many different travel policies, employees are most likely to say that travel must be approved by upper management (56%) and/or that there are limits to how much they can spend per day on a business trip (43%). Four in ten (40%) workers say their company restricts the class of airfare in which they can fly. Two thirds claim that their companies have restrictions on the length of business trips (33%) and/or on the number of people that can go on a trip (32%). Some employees say their firms restrict the destinations they can travel to (29%) and even restrict them from travelling outside the country (20%).

**Business Travel Policies Employees Say Their Company Has In Place
(Among Workers Who Travel For Business)**

