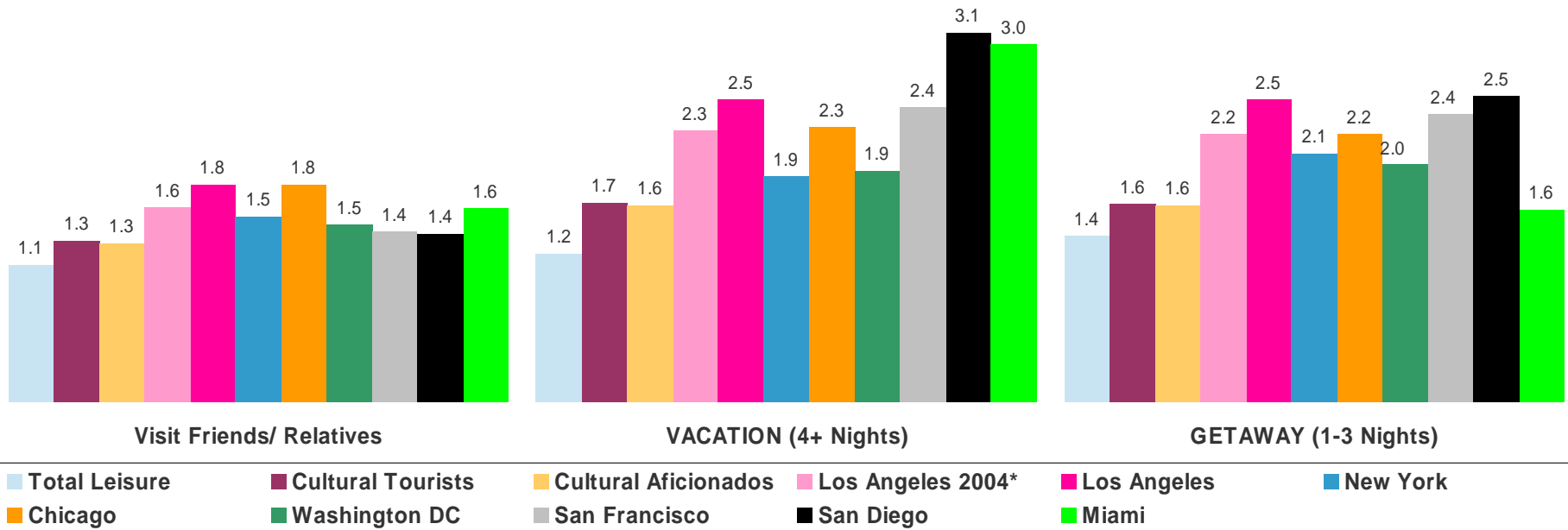


Purposes of Leisure Trips (Q3)

Differences that appear by type of trip include:

- Cultural tourists/aficionados are more likely to take both short getaways and long vacation than average leisure travelers
- Cultural aficionado visitors to California cities (Los Angeles, San Francisco, and San Diego) and Chicago tend to take more trips of both types of vacations than visitors to other cities. Miami visitors take more long vacations, probably influenced by cruisers, but place near the leisure average for short getaways
- Fewer differences appear for visiting friends/relatives by city, although Los Angeles and Miami visitors lead.

City Visitors Are All Cultural Aficionados

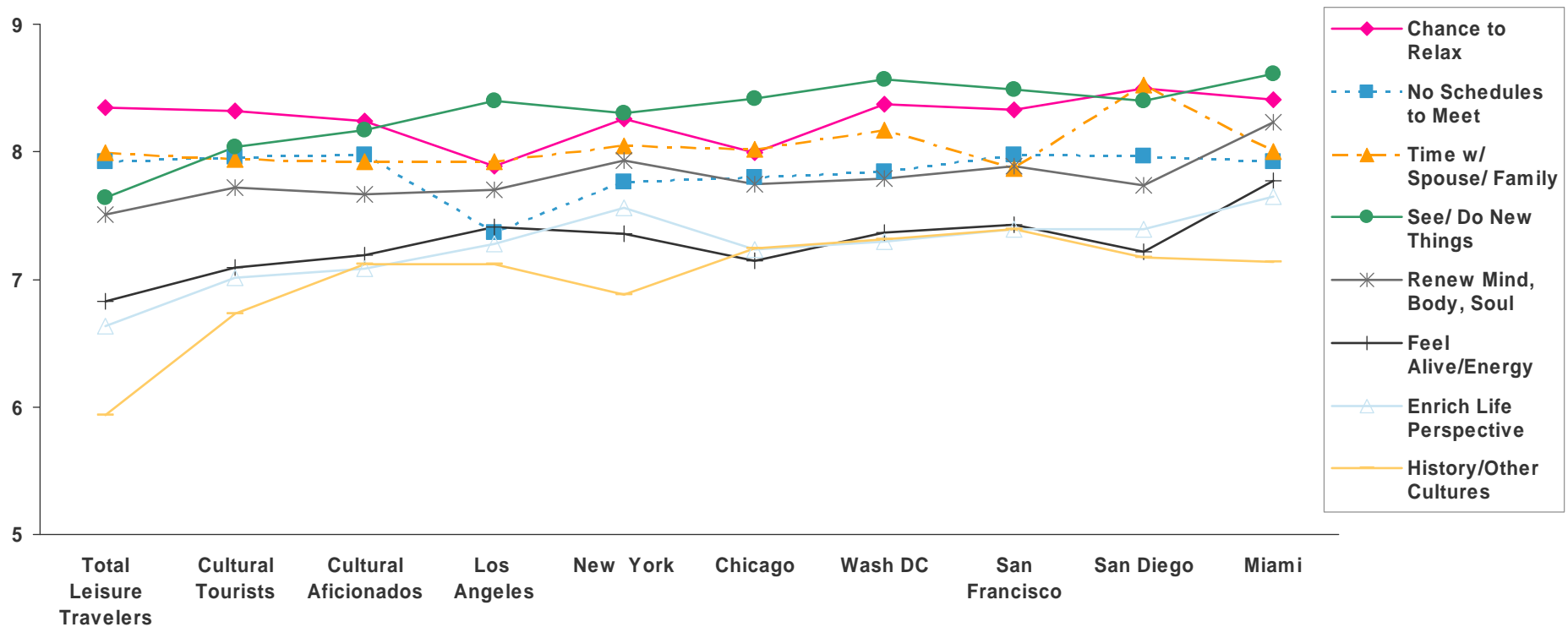


Base: Any Leisure Travel: 5,096

* Prior wave shown for Los Angeles; all other segments = 2007 only

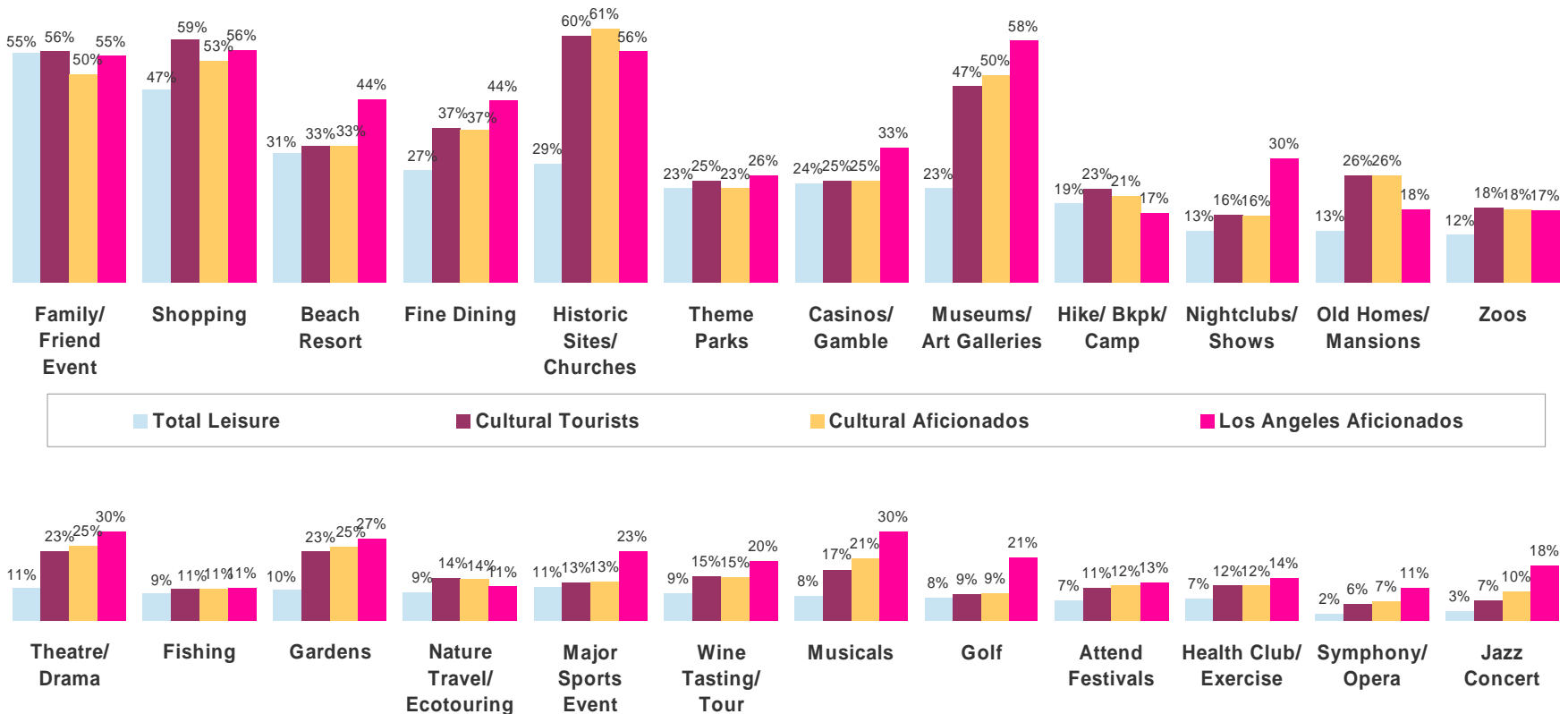
Motivations for Leisure Trips (Q13)

Of 15 reasons listed for taking leisure trips, these eight top the list (average on 10-pt. scale). The importance of “to gain knowledge of history or other cultures” places much higher for Cultural Tourists and Aficionados (especially those visiting Chicago, Washington DC, and San Francisco) than for typical leisure travelers.



Base: Total Leisure Travelers: 5,096

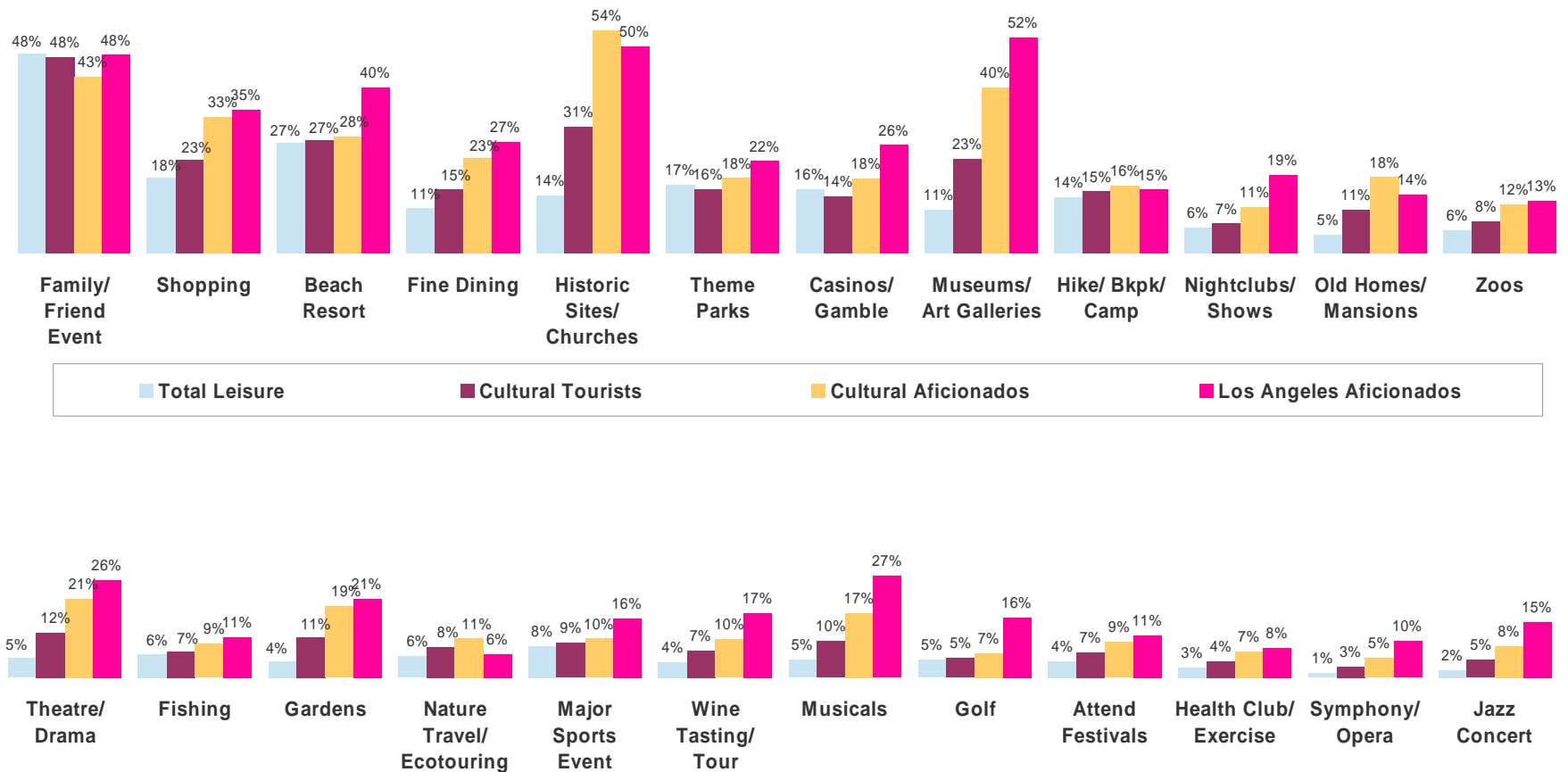
Leisure Activity Participation (Q11) (cont'd)



Note: several activities of less importance to travelers (and less relevance to cultural tourism) place between *health club/exercise* and *symphony/opera* (although small, *symphony/opera* and *jazz concert* are relevant). Those not shown include: *snorkeling, spas, snow sports, biking, bird watching, desert resorts, caverns, motor sports (NASCAR), riverboat gambling, and horseback riding*.

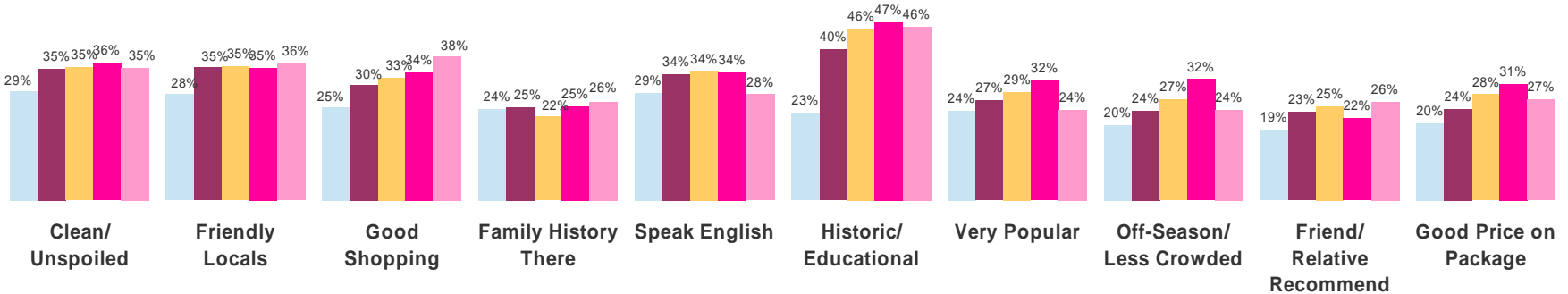
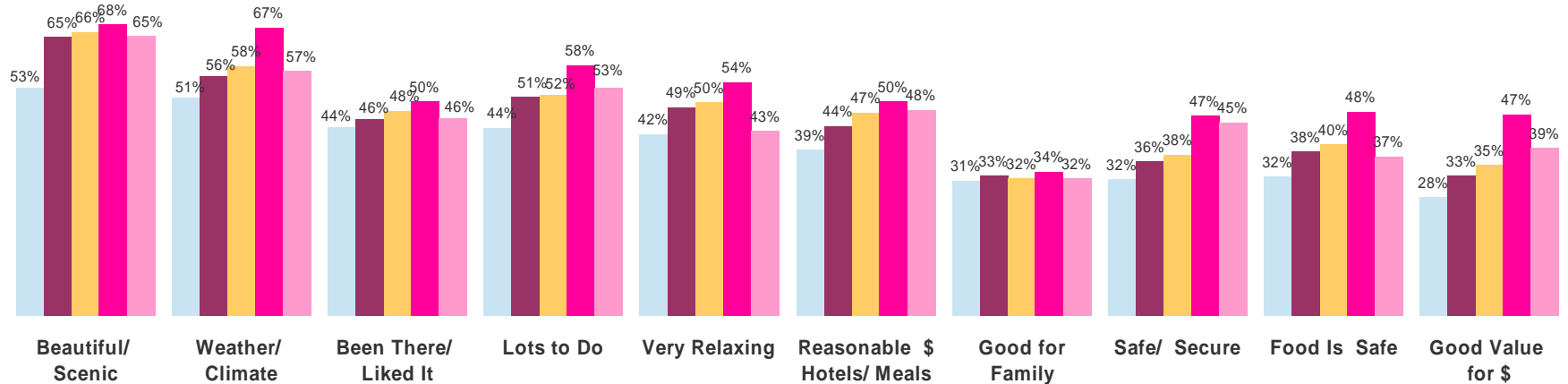
Base: Total Leisure Traveler Participation: 4,593

Top Activities by Intensity: Primary Activities (Q11) (cont'd)



Base: Total Leisure Traveler Participation and Answered: 3,580

Contributors to Destination Selection (Q14) (cont'd)



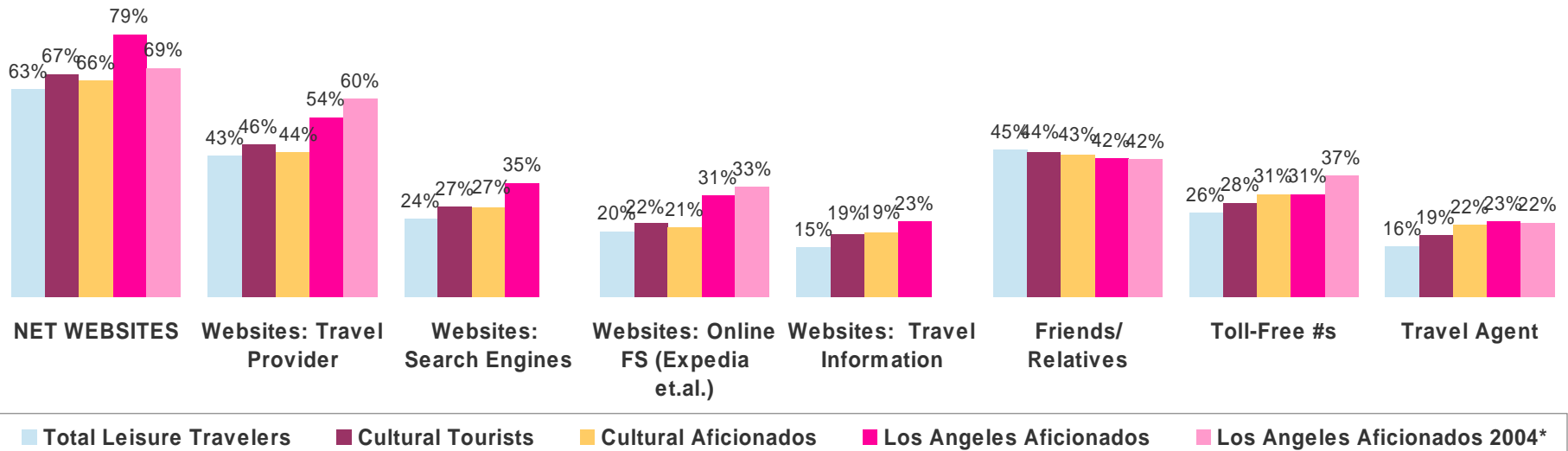
Base: Total Leisure Traveler Participation: 5,096

* Prior wave shown for Los Angeles; all other segments = 2007 only

Leisure Information Sources for Last Two Trips (Q18)

Only minor differences appear between typical leisure travelers and Cultural Tourists/Aficionados for information sources that they consult. However, Los Angeles Aficionados:

- Are more likely to use the Internet, often citing search engines and travel information websites (options not included in the 2004 survey) as well as Travel Provider Websites (airlines, hotels, etc.)
- Rely on friends/relatives less often than other segments, but this source still ranks second only to Travel Provider Websites.



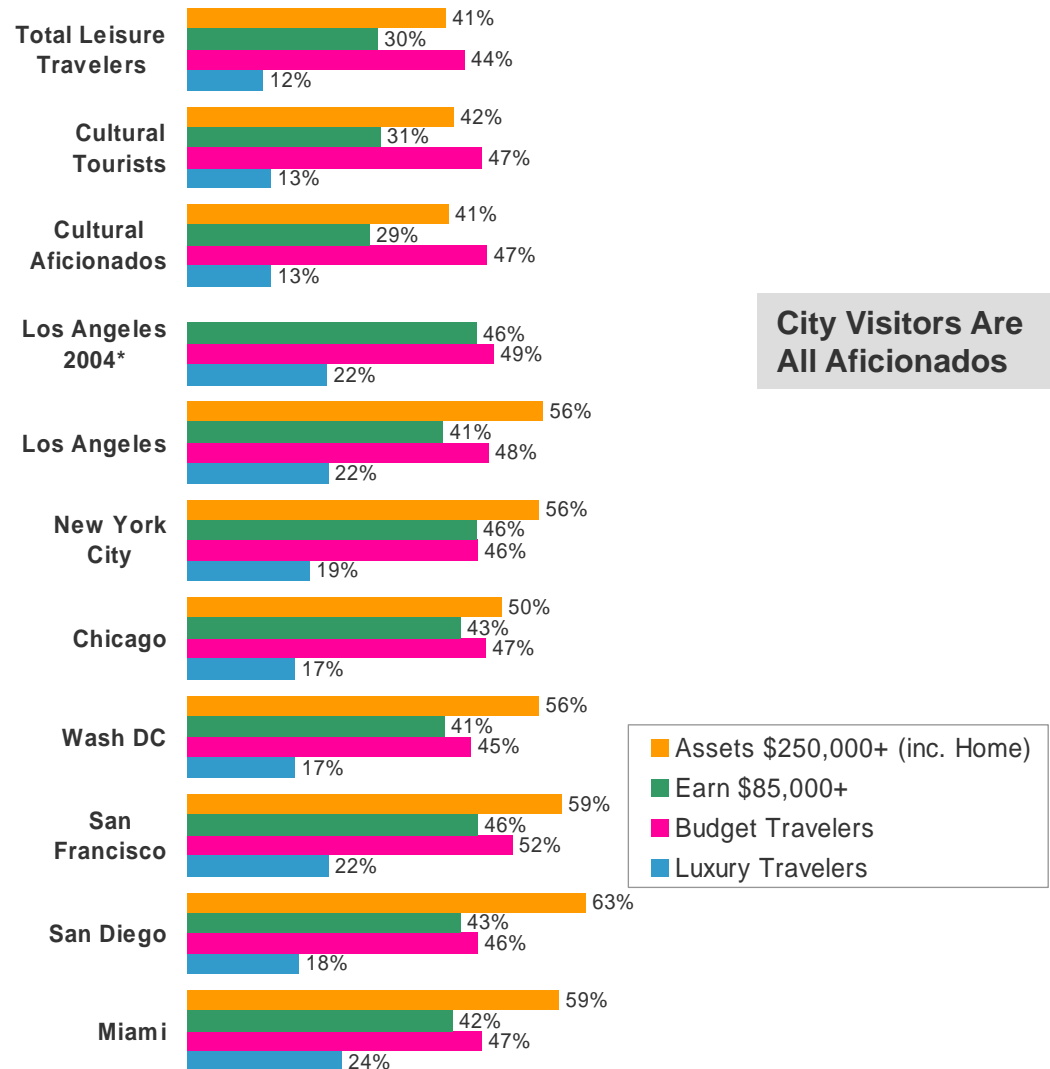
Base: One of Last Two Trips for Leisure: 3,623

* Prior wave shown for Los Angeles; all other segments = 2007 only

Travel: Budget vs. Luxury, Income, Assets (Q51, Q55)

The proportion who consider themselves budget travelers probably includes those who are looking for “value,” not just inexpensive:

- Nearly half (47%) of cultural tourists and cultural aficionados consider themselves budget travelers – 3½ times the number of luxury travelers (13%).
- However, in cities with larger proportions of wealthy visitors, whether measured by by income or by assets, the proportion considering themselves “budget” tourists does not show a corresponding decline nor does “luxury” tourists show a corresponding rise.
- Los Angeles aficionados has slightly fewer visitors reporting \$85,000+ in income, but the proportion of budget and leisure travelers are almost identical – three years later.



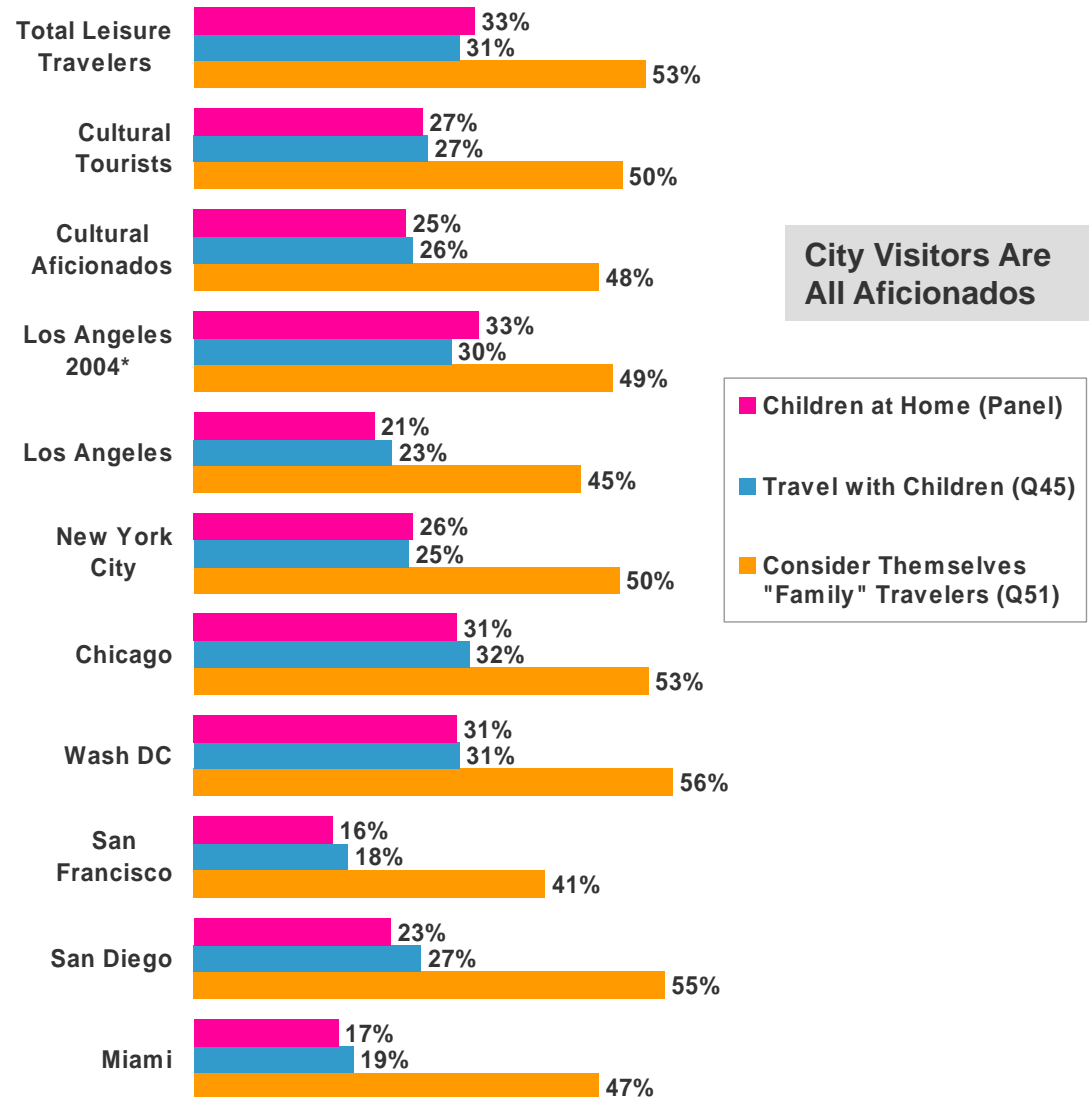
Base: Leisure Travel Past Year: 5,096

* Prior wave shown for Los Angeles (assets excluded because they have been redefined); all other segments = 2007 only

What's in a Family? (Q51, Q45)

Children do not appear to be a “necessary condition” for a family, suggesting a variety of “family” unit definitions, such as husband/wife, significant others, or other family combinations:

- Roughly half of Total Leisure Travelers, Cultural Tourists, and Cultural Aficionados consider themselves “Family” travelers. The proportion drops notably for San Francisco visitors; Los Angeles and Miami place somewhat lower as well.
- Yet, only a quarter to a third have children at home; fewer in San Francisco, Miami, and Los Angeles.
- Most who have children travel with children (sometimes slightly more – grandchildren?).



Base: Leisure Travel Past Year: 5,096

* Prior wave shown for Los Angeles; all other segments = 2007 only

So what does this all mean?

Breakout Topics

How would you...

- ...develop new/fresh product/content in your community? [PRODUCT]
- ...help cultural organizations become good destinations? [TRAIN]
- ...get this product information to your community? [DISSEMINATION]
- ...change self-perception in your community? [SELF-PERCEPTION]