



SpringHill Suites 2011 Travel Attitudes Survey: Executive Summary

TNS, an independent research company, has completed an online survey of 1,000 U.S. consumers on their vacation travel habits and attitudes. This research was commissioned by SpringHill Suites, Marriott International's all-suite brand, for the second year in a row and surveyed Americans on a wide variety of topics, from jobs and economics, to online technology and social media, to health and fitness, to relationships.

The survey data provides a complex portrait of the state of American attitudes, and three megatrends emerged from the questions posed to participants.

Megatrend #1: Americans Need a Mental Break Now More Than Ever

Most Americans need a mental break from the daily pressures that they face. *Three-quarters of Americans reported that taking a vacation this year will be important to their mental health*, and among the reasons cited, 37 percent will seek to rejuvenate their spirits and 44 percent hope to relieve themselves of stress.

Most U.S. vacationers will unplug from work to get that mental break, as *two-thirds of Americans will not check their work e-mail while on vacation*. This trend is considerably more prevalent among women than men, as 44 percent of men will check work e-mail while on vacation but only 28 percent of women will.

However, most Americans will not let the costs of vacationing get in the way of their needed mental break. Recent gas price increases will not change travel plans for 6 in 10 Americans, according to the survey, and 89 percent will choose the destination before the vacation package deal, a less cost-conscious approach. In addition, two-thirds of Americans will travel the same or more this year than last.

Their determination to get a mental break this year does not, however, entirely wash away American's stress about spending money. Sixty-four percent of women and 41 percent of men report feeling guilty about spending money on vacation.

Megatrend #2: Vacationing Americans Savvy About Use of Basic Online Tools

Americans appear to be savvy about the basic online tools available to them for vacation planning and communicating about their vacation experience. More than half of Americans use travel reservation sites and search engines to find travel deals while more than three-quarters allow online user reviews to at least somewhat influence their travel choices.

More than half will use social media on vacation, and of those, 89 percent will use Facebook. Seventy-seven percent of vacationers will post status updates while on their trip.

Nonetheless, Americans are showing that they are not yet comfortable with some of the online opportunities that are now available to them. Few are using social media specifically to find travel deals (11 percent of respondents) and only a minority are following hotels on Twitter and Facebook (30 percent of respondents), despite the availability of discounts through these channels. Of those Americans that own smartphones, sixty-nine percent have never downloaded a travel app.

Megatrend #3: Americans Seem to Have a Love Affair with Beds

When given the choice of the household comforts they will miss on vacation, an overwhelming majority of Americans—57 percent—said they will miss their beds most when on vacation. Only 13 percent would miss their television/media rooms and less than 9 percent would miss their living rooms and couches.

In addition, 20 percent of Americans ranked the mattress as the item vacationers would like to purchase most from their hotel rooms, surpassing the TV and pillows, both at 8 percent of respondents.

The rest of this executive summary provides details on the most insightful data produced by this survey of U.S. vacationers. Full raw data tables are available upon request.

SpringHill Suites Second Annual Travel Attitudes Survey - Full Survey Findings

Fourth of July Will be Most Traveled Holiday of the Year in 2011

- Fourth of July will be the most popular holiday to travel on this coming year despite conventional wisdom that Thanksgiving is the most traveled holiday
- 24% of Americans will travel on Fourth of July, 19% will travel on Christmas, 16% will travel on Thanksgiving, 13% will travel on Memorial Day, and 13% plan to travel on Labor Day
- 49% of Americans say they aren't planning to travel on any of the five major holidays this year (Memorial Day, Fourth of July, Labor Day, Thanksgiving and Christmas)

Social Media Catching on With Vacationers

- Over half (52%) of Americans use or will use social media during vacation in 2011, up 28% from the 2010 number of 24% (Table 21)
- Of those that will use social media on vacation, 77% will post status updates while on vacation (Table 22)

Americans Are Calling For a Mental Break!

- 3 in 4 Americans feel that taking a vacation will be important to their mental health this year.
- Top three reasons why vacations are important to American's mental health:
 1. Relieving stress (44%)
 2. Rejuvenating spirits (37%)
 3. Getting relationships back on track (8%)

Female Vacationers More Stressed About Money than Men

- 64% of women feel guilty about spending money on vacation, but only 41% of Men Do

The Overworked American Finds Leaving Job Behind Easier Than We Thought

- Two-thirds of Americans don't check work e-mail on vacation; those that do just want to avoid Monday morning inbox overload
- Women more likely than men to not check work e-mail on vacation (72% vs. 56%)

Gas Prices Won't Change American's Travel Plans

- 61% of Americans will not change plans despite gas price increases
- Northeasterners least likely to change travel plans due to gas price increases (71% of respondents compared to the Midwest at 59%, South at 58% and West at 60%)

Hair Matters More to Male Travelers than Women

- 38% of men get haircuts before traveling while only 28% of women do
- Travelers not likely to lose weight before going on vacation (only 14% of respondents)

Beds Matter to Americans More Than We Thought! Over Half Miss Their Beds Most When on Vacation

- 57% of Americans miss their bed most when on vacation

North vs. South: Vacation Routines Diverge

- Northeasterners list shaving as the one routine they absolutely could not go without while on vacation (24% Northeast, 19% Midwest, 15% South, 13% West)
- Southerners list prayer as the one routine they absolutely could not go without while on vacation (26% South, 16% West, 14% Midwest, 9% Northeast)

Parents Unite: Deep breathing, Yelling or Ignoring Gets Them Through the Days

- Three top cool-down techniques when children get out of hand on vacation:
 1. Deep breathing (Most used by Southerners)
 2. Yell at the kids (Most used by Midwesterners)
 3. Ignore them (Most used by Northeasterners)

Top Ways Americans Find Travel Deals

- Travel reservation sites (56%)
- Search engines (50%)
- Newspapers/Magazines (14%)
- And... 13% still use travel agents to find travel deals!!

Deals Don't Drive Destination Choice

- 89% of Americans select the destination first and then find a vacation package rather than finding a vacation package first, destination second

Men Less Likely to Vacation with Family than Women

- 41% of men plan to vacation with only their spouse/partner on their next vacation while 56% of women plan on vacationing with their nuclear family

Top Three Things Americans Disagree About While on Vacation

- How much to spend (26%)
- What to do (22%)
- Where to eat (9%)

Americans Most Likely to Sleep Off Stress After Conflict on Vacation

- Americans cite sleep as the thing they're most likely to do to relieve stress after a conflict while on vacation

Traveling Americans Are Reaching Out to Family/Friends on Facebook During Vacation

- 89% of those that use social media on vacation say their most popular social media tool is Facebook

Benefits of Following Hotels on Twitter/Facebook

- Americans that follow hotels on Twitter or Facebook cite the following as benefits of doing so:
 1. Discounts (37%)
 2. Travel tips (17%)
 3. Opportunity to provide feedback on service (12%)

It Does Matter What People Say...

- More than three-quarters of traveling Americans allow online user reviews to influence their travel choices. Frequent travelers trust online user reviews the most

Technology Helps Americans Pack Lighter on Vacation

- The smartphone was voted as the most needed electronic device on vacation (31%). However, the cell phone (with no internet capability) came in a very close second place (30%), followed by the laptop (23%) in third.

Travel Apps Have Yet To Catch On

- Of those that own smartphones, 69% have not downloaded a travel app.

Cash Windfalls Are a Trip!

- 6 in 10 Americans would travel more after a bonus, raise, inheritance or tax return

Mattress Envy: Top Hotel Item on Wish List

- Americans rank the mattress as the item that vacationers would like to purchase from a hotel room (20%)
- TV and pillow tie for second at 8%

Couples Without Kids Less Likely to Take Anniversary Getaway

- Couples are more likely to take a getaway on an anniversary if there are children in the household (41%) than those who don't have children in the household (31%)

Top Five to Have Conflict With While on Vacation

1. Spouse/partner
2. Other
3. Young child or children
4. Teenager
5. Parents

Vacationers Don't Care About the Details

- Three-quarters of the traveling public do not have a specific plan when they get to their travel destination

Most Americans Really Let Go of Diet When on Vacation

- Only 45% of Americans say they seek to avoid gaining weight on vacation and 55% of them cite walking/jogging as their favorite technique

Staying Inside: Travelers Prefer Gym Machines Over Jogging Paths

- Three times as many travelers stay fit on the road with cardio machines rather than jogging outside

Top Three Ways Women Stay Fit on the Road and in a Hotel:

1. Cardio machines (31%)
2. Jogging path (9%)
3. Stretching/yoga or pilates area (6%)

Top Three Ways Men Stay Fit on the Road and in a Hotel:

1. Cardio machines (25%)
2. Jogging path (9%)
3. Free weights (8%)