

American Express Spending & Saving Tracker



2013 Summer Vacations

May 28, 2013

Prepared by:

ebiquity

Data-driven insights

Research Method

The **American Express Spending & Saving Tracker** research was completed among a random sample of 1,505 adults, including the general U.S. population, as well as an Affluent demographic, defined as having a minimum annual household income of \$100,000.

Interviewing was conducted by **Ebiquity**, formerly Echo Research, between April 18 and 22, 2013. Overall the results have a margin of error of ± 2.5 percentage points at the 95% level of confidence (± 4.0 Affluent). And for additional segments illustrated in this report:

- ± 2.9 Total with summer vacation plans
- ± 4.2 Affluent with summer vacation plans
- ± 5.2 Total with children 12 and under
- ± 8.1 Affluent with children 12 and under

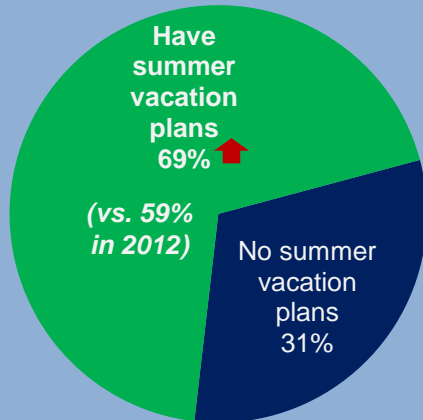
More Consumers Have Summer Vacation Plans and Expect to Increase their Per Person Spend Compared to One Year Ago

Sixty-nine percent (up from 59% in 2012) of consumers have summer vacation plans this year and 31% expect to spend \$1,000 or more per person on their plans (up from 27% in 2012).

Any Summer Vacation Plans? - among Total Consumers

Summer Vacation Spending (2013 vs. 2012)

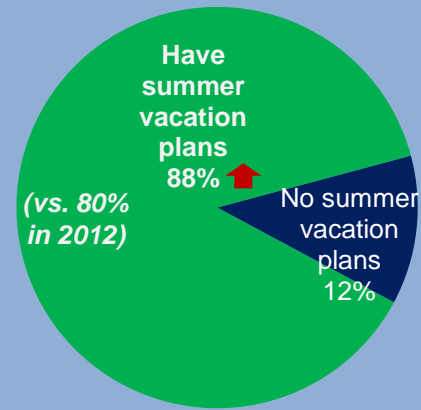
- *Less than \$1,000* _____ 41% vs. 44%
- *\$1,000 +* _____ 31%↑ vs. 27%
- *Not sure* _____ 28% vs. 29%



Any Summer Vacation Plans? - Among Affluent Consumers

Summer Vacation Spending (2013 vs. 2012)

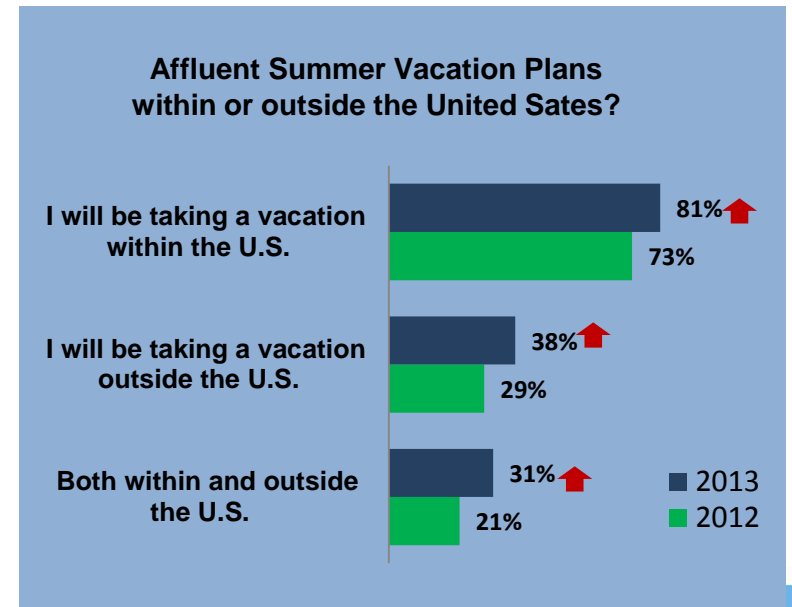
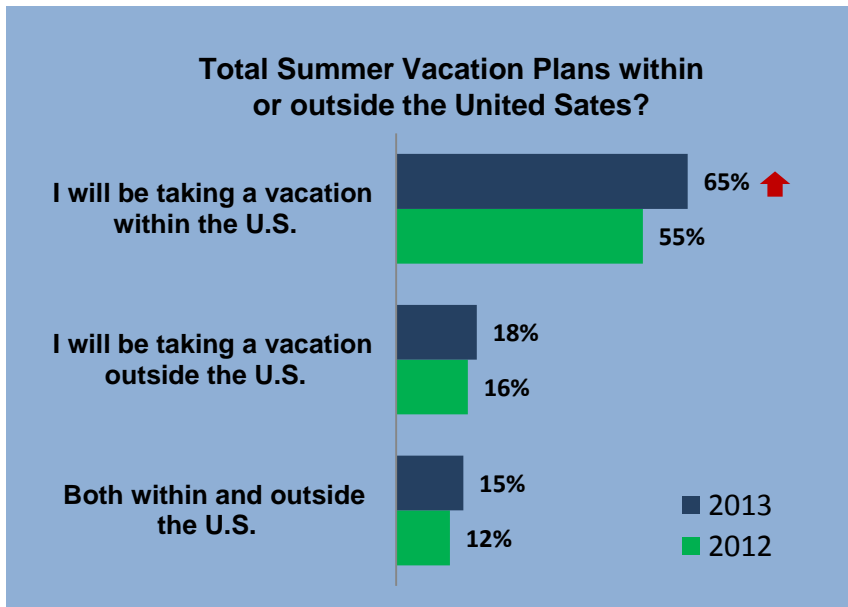
- *Less than \$1,000* _____ 25% vs. 32%
- *\$1,000 +* _____ 50%↑ vs. 44%
- *Not sure* _____ 25% vs. 24%



Domestic and International Travel is on the Rise among Affluent Consumers

While sixty-five percent of consumers overall with summer vacation intentions say the plan to stay with the U.S. (up from 55% in 2012) - plans are stronger among Affluent consumers where 81% intend to travel within the U.S., 38% outside the U.S, and 31% both within and outside the U.S. – and all up significantly from 2012 (73%, 29%, and 21%, respectively).

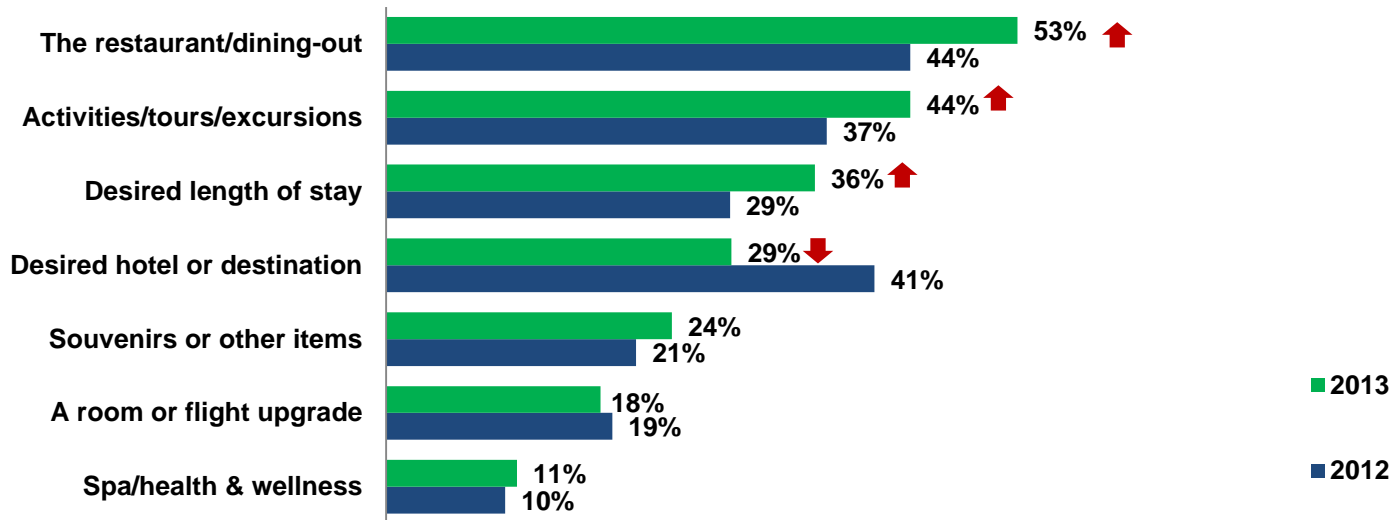
Two thirds (66% - up from 65%) overall with summer vacation plans intend to take at least one full week trip – 40% one week and 26% (up from 24%) two or more weeks.



The Top Area Consumers with Summer Vacation Plans are Most Willing to Spend Money on is Restaurants or Dining-Out

In thinking about their next destination, more than half with summer vacation plans are most willing spend money on the restaurant/dining-out (53% vs. 44% in 2012), followed by more than two in five (44% vs. 37% in 2012) who will splurge on activities/tours/excursions.

**Areas Most Willing to Spend Money on for Summer Vacations
Total with Summer Vacation Plans**



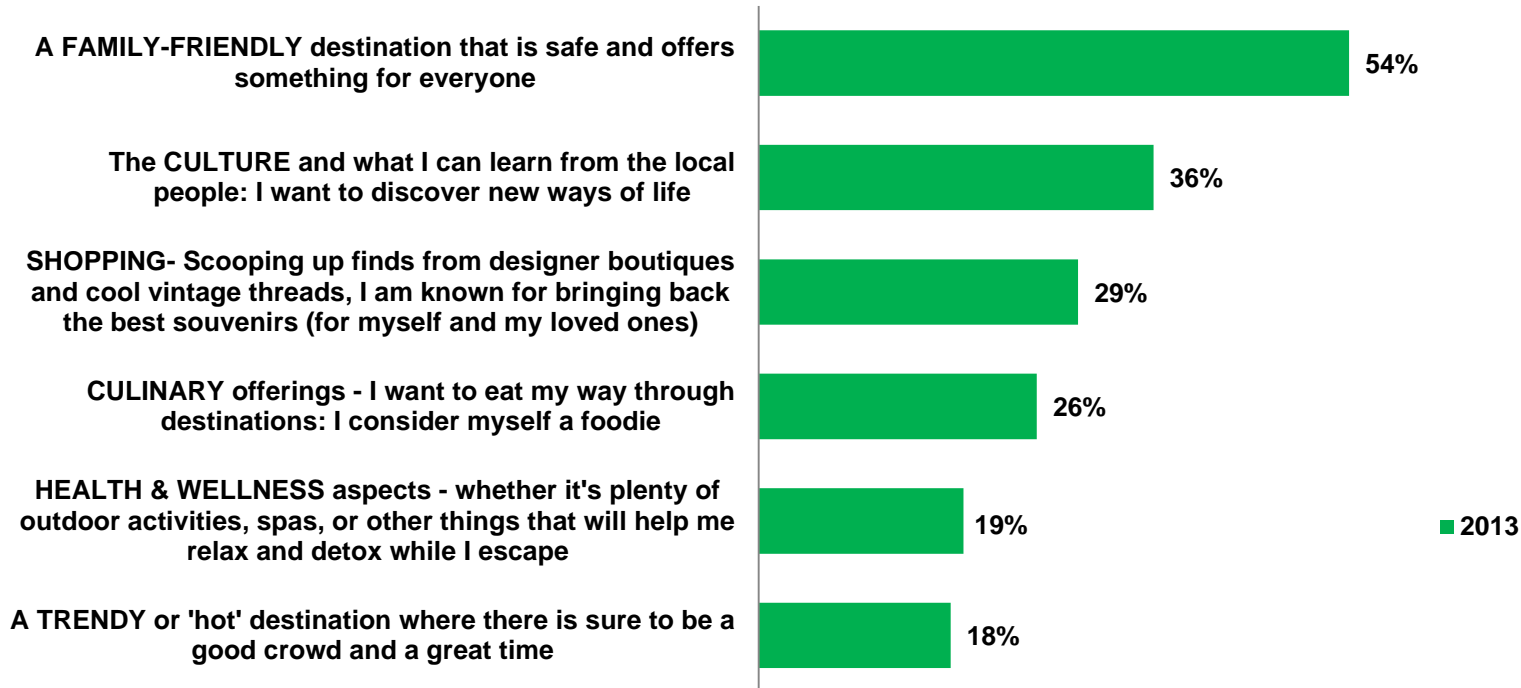
Q. Thinking about your summer vacations - which of the following are you MOST willing to spend money on?
 Base: Among those with summer vacation plans
 Significantly higher/lower from previous year at the 95% confidence level



Summer Travelers Prioritize a Family Friendly Destination when Making their Vacation Plans

Fifty-four percent of consumers with summer vacation plans are looking for a family-friendly destination as they make their plans this year, followed by more than one third (36%) who look for culture.

**What do Consumers Look for When Planning a Vacation?
Total with Summer Vacation Plans**

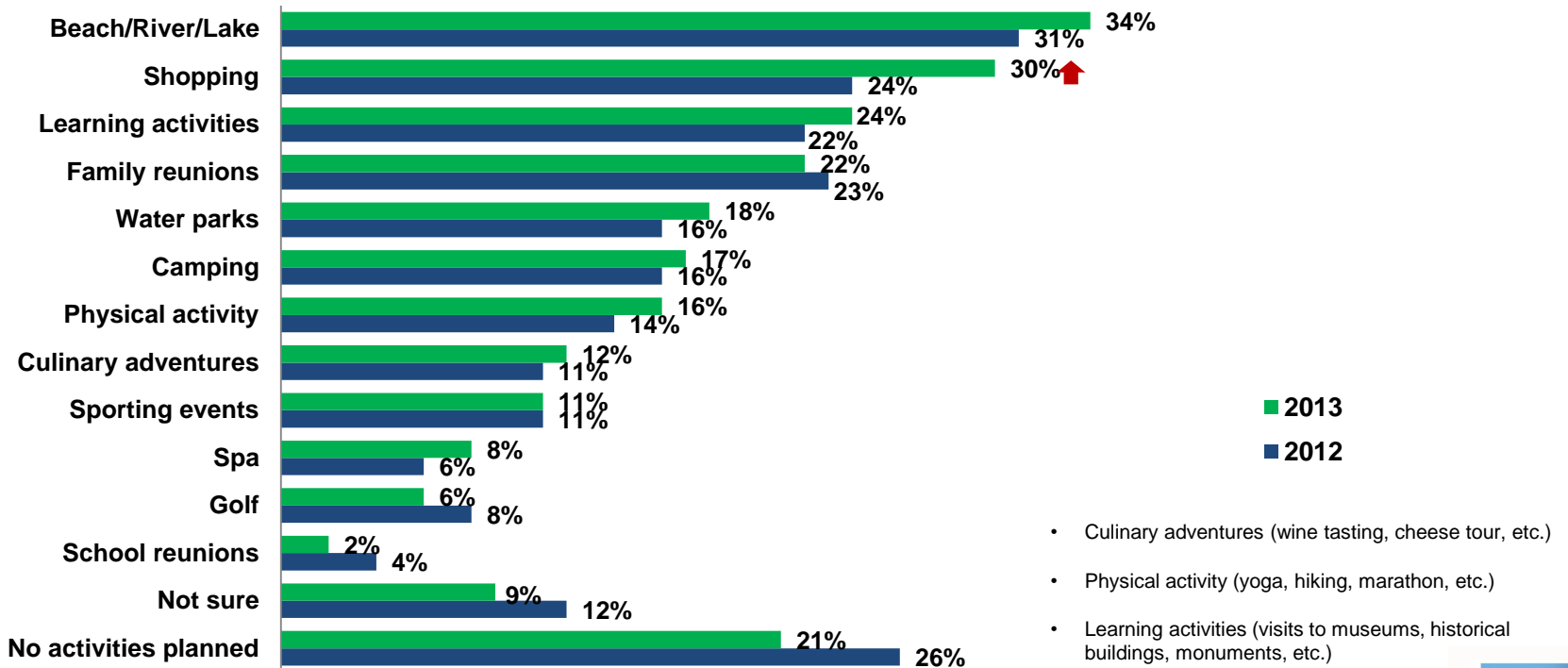


Q. What do you look for when planning a vacation?
Base: Among those with summer vacation plans

Shopping is on the Rise for Travel Agendas in 2013 vs. 2012

More than one third (34%) have plans to travel to a beach/river or lake, followed by 30% who say they have shopping plans on their vacation (24% in 2012), and 24% who will be incorporating learning activities.

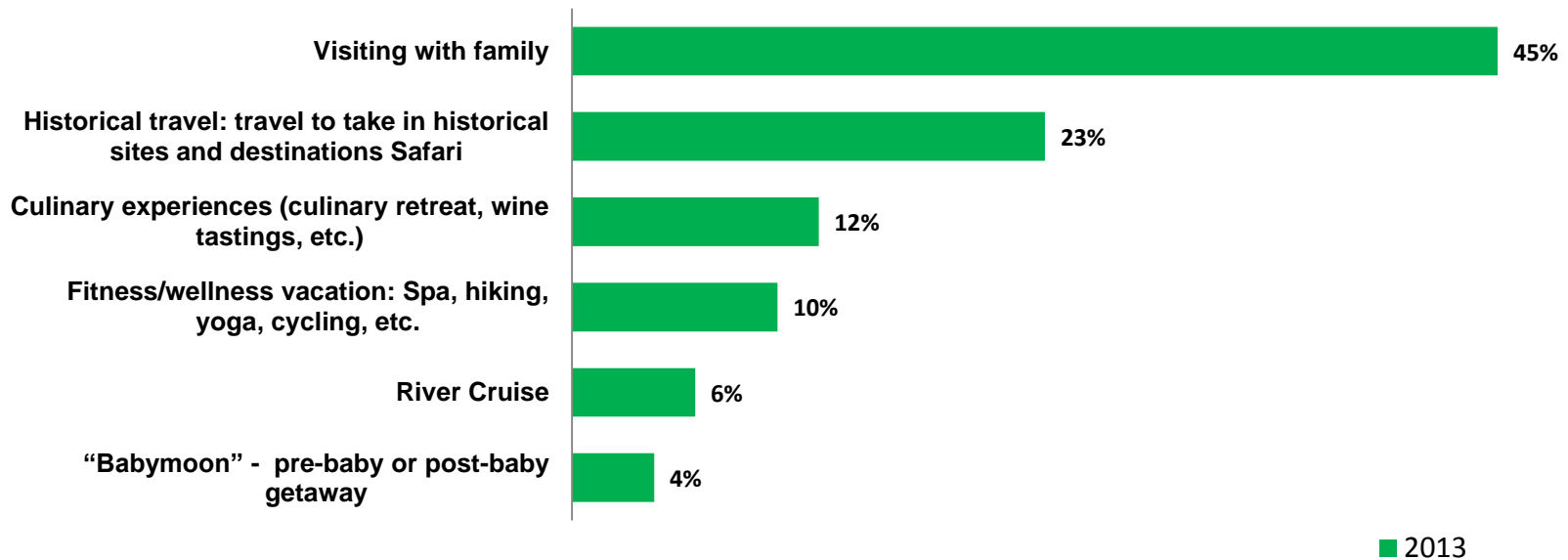
Activities Planned for Summer Travel this Year – Total with Summer Vacation Plans



A Summer Vacation for the Purpose of Visiting Family is the Leading Type of Trip Planned

Forty-five percent of summer travelers intend to visit family this year, followed by a historical themed trip (23%), culinary experience (12%), fitness/wellness vacation (10%), river cruise (6%), and a 'babymoon' (4%).

Type of Vacation Planned for Summer Travel this Year – Total with Summer Vacation Plans

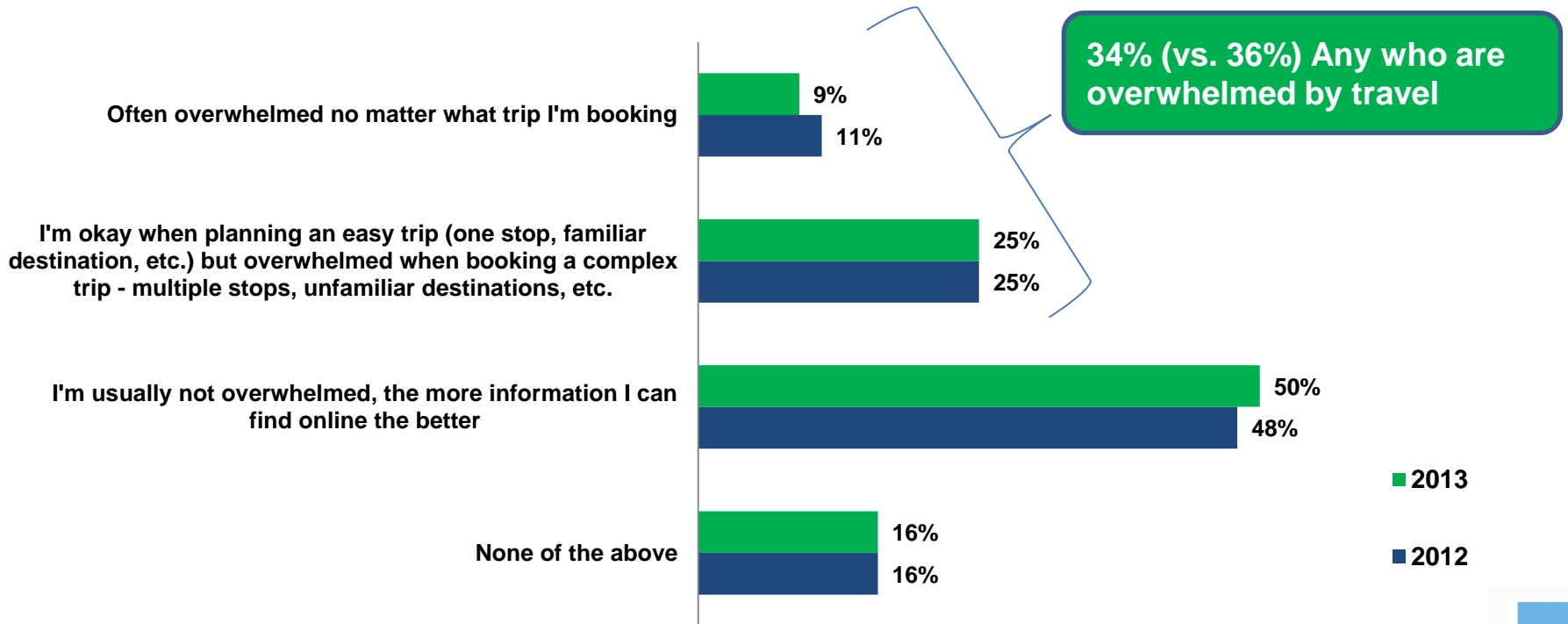


Q. What type of vacation (s) are you planning this summer? Base: Among those with summer vacation plans

Travel Information Available Online is Not Straight Forward to All

One third of consumers with summer vacation plans report being overwhelmed with the travel information available online – 9% often, and 25% for the more complex type trip but okay with the easy trips.

How Overwhelmed are Consumers by All Of the Travel Information Available Online?
Total with Summer Vacation Plans

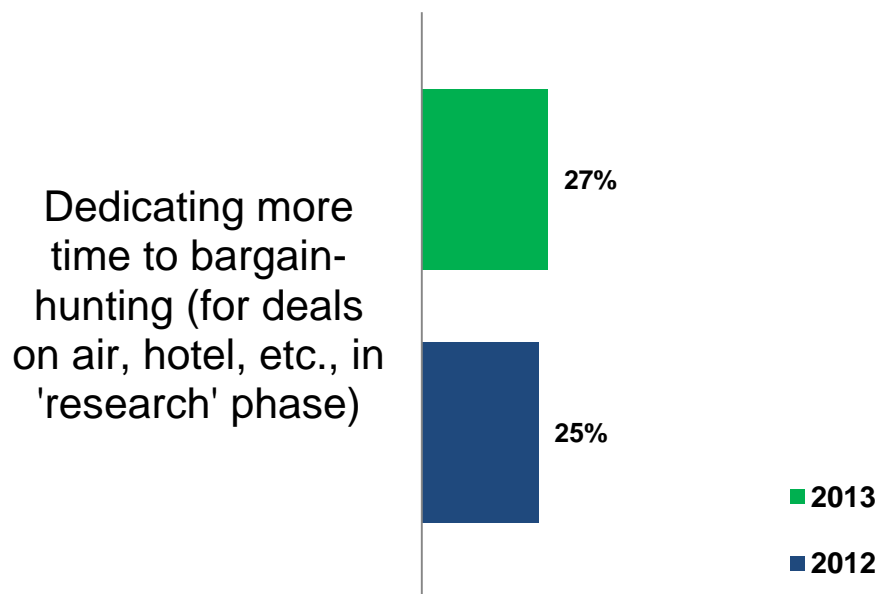


Consumers Strategize their Travel Plans, Looking for Bargains and Booking Well In Advance

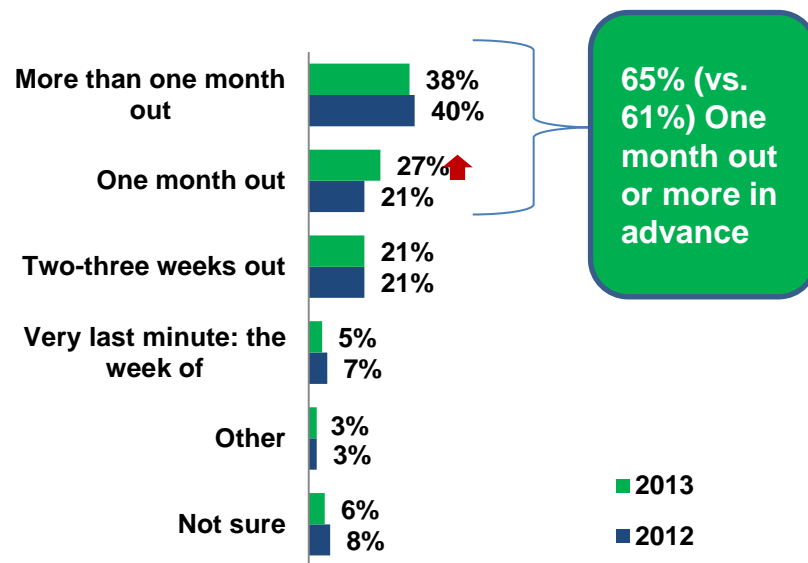
In an effort to reduce the cost of their summer vacation, more than one quarter (27%) say strategize by dedicating more time to bargain-hunting (for deals on air, hotel, etc. in the 'research' phase).

About two thirds (65%) will book their summer travel at least one month out (27%) or more than one month out (38%).

Strategy to Reduce Cost of Summer Vacation - Total with Summer Vacation Plans



Booking Summer Travel - Total with Summer Vacation Plans



Q. Strategy to reduce the cost of your summer vacation – “Dedicating more time to bargain-hunting (for deals on air, hotel, etc., in 'research' phase)” ?

Q. How far out do you typically book your summer travel?

Base: Among those with summer vacation plans

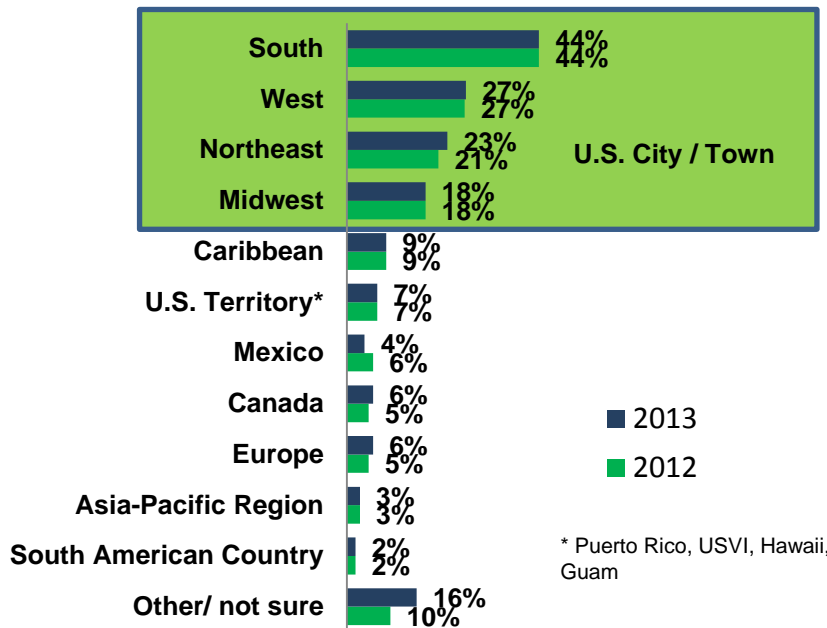
↑ Significantly higher from previous year at the 95% confidence level



A Southern U.S. City / State is the Top Destination among Consumers with Summer Vacation Plans

More than two in five (44%) consumers with summer vacation plans say they intend to travel to a southern U.S. city or town this year. One in five plan to vacation in Florida (21%) and 11% to the Bahamas, among other summer destinations this year.

Travel Destination among Consumers with Summer Vacation Plans¹



Specific Travel Destinations

Top U.S. State Destinations ²	2013	2012
	• Florida	21%
• California	15%	15%
• New York	10%	10%
• Nevada	8%	7%
• South Carolina	7%	7%
• North Carolina	7%	9%

Top Destinations Outside the U.S. ³	2013	2012
	• Bahamas	11%
• Italy	8%	7%
• United Kingdom	7%	6%
• Jamaica	7%	n/a
• France	5%	4%
• Cayman Islands	4%	7%

Q. Which of these destination(s) will you visit on your vacation(s) this summer?

Q. Where specifically will you be going on your summer vacation?

Base: Among those with summer vacation plans

¹ Among those with summer vacation plans

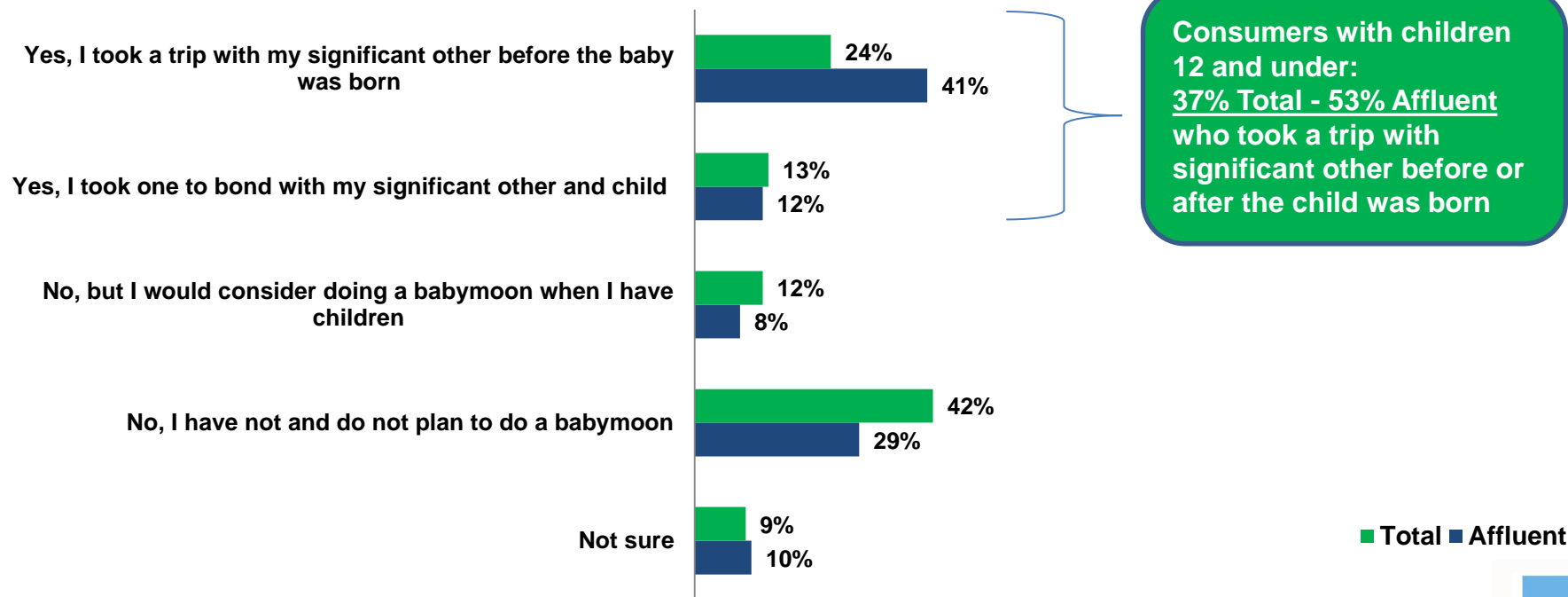
² Among those traveling to a U.S. City/ Town

³ Among those traveling outside of the U.S

The 'Babymoon' - Many with Children 12 and under Took a Pre or Post Baby Vacation with their Significant Other

More than one third (37%) of consumers with children 12 and under say they took a trip with their significant other before the baby was born (24%) or took one together to bond with their child (13%).

Any Pre or Post Baby Vacations, Also Referred to as a 'Babymoon' – Among Consumers with Children 12 and Younger



Q. Thinking about your previous vacations (not just your summer vacations) – were any of those vacations a pre or post baby vacation, also referred to as a 'babymoon'? BASE: Total with children 12 and under