Travelers’ Use of the Internet, 2002 Edition was prepared by:

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<table>
<thead>
<tr>
<th>TRAVELSCOPE SUBSCRIPTION</th>
<th>CUSTOM TABULATIONS/REPORTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receive the entire database!</td>
<td></td>
</tr>
<tr>
<td>TIA provides TravelScope subscribers the complete data file each quarter on CD-ROM. The data provide household-trip and person-trip volumes, as well as trip and traveler profiles of all U.S. resident visitors to all 50 states. For an additional fee, TIA can append Claritas Inc’s PRIZM® geodemographic codes to the data.</td>
<td></td>
</tr>
<tr>
<td>Purchase just the data you need!</td>
<td></td>
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<tr>
<td>TIA can provide custom tabulations and custom analysis reports. Data tabulations are customized to your needs. You can segment by sector (e.g., hotel or air), by type of trip (e.g., Leisure vs. Business) by activity groups (e.g., shoppers), by demographics (e.g., age 55+), for specific geographies (e.g., Designated Market Areas (DMA) or larger Metropolitan Statistical Areas (MSA)) and by timeframe (e.g., summer travelers only).</td>
<td></td>
</tr>
<tr>
<td>TravelScope subscribers are also invited to attend (for no additional fee) an annual Users’ meeting/training seminar and several group meetings at industry events.</td>
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<tr>
<td>TIA will work with you to define a reliable data set and effective reporting parameters to meet your analysis requirements.</td>
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</table>

For further information contact Mary Jo Torrey, Manager of Cooperative Research at (202) 408-2159 or mtorrey@tia.org. For further information on national reports using TravelScope data, see a list of our Domestic Travel Reports at [http://www.tia.org/Pubs/domestic.asp](http://www.tia.org/Pubs/domestic.asp).
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INTRODUCTION

Over the past several years, Internet and electronic commerce have caused dramatic change in the way travel information and services are delivered to consumers. As travel distribution technology advances, the travel and tourism industry must stay aware of how these advances affect consumer demand for travel services.

In 1993, the Travel Industry Association of America (TIA) began surveying consumers about their acceptance of new technologies for planning and purchasing travel. With this survey, TIA established a vehicle to track consumer use of the Internet for travel planning and booking. Since 1996, TIA has tracked and reported travelers’ use of the Internet, with changing areas of focus as travel technology has evolved. The *Travelers’ Use of the Internet, 2002 Edition* is the seventh edition of this report.

During July 2002, 1,300 randomly selected American adults, including approximately 1,000 travelers, were interviewed by telephone about their use of the Internet for travel. This study was conducted as part of the TIA Travel Survey, a quarterly telephone survey among a representative sample of U.S adults. (See Appendix A for a description of TIA Travel Survey methodology.) Survey topics included use of the Internet for travel planning and booking, use of traditional travel information sources, satisfaction with Internet experience, intent to use the Internet for travel in the future, and the use of other electronic communication while traveling.

Today, over half of American adults use the Internet. Interestingly, travelers* are more likely than adults to make this assertion. Nearly half of travelers use the Internet for travel planning, while one in four use it to make travel reservations. Not surprisingly, business travelers are more likely than pleasure travelers to indicate they use the Internet.

<table>
<thead>
<tr>
<th>USAGE OF THE INTERNET, 2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Adults</td>
</tr>
<tr>
<td>Travelers</td>
</tr>
<tr>
<td>Travelers who use the Internet for travel plans</td>
</tr>
<tr>
<td>Travelers who use the Internet for travel reservations</td>
</tr>
<tr>
<td>Business travelers</td>
</tr>
<tr>
<td>Pleasure travelers</td>
</tr>
<tr>
<td>Frequent travelers taking five or more trips in the past year</td>
</tr>
</tbody>
</table>

*Source: Travel Industry Association of America

*A traveler is defined as a person who took at least one trip 50+ miles away from home, one-way, in the past year (not including commuting to/from work or school).*
This report examines current use of the Internet for travel planning and booking among several market segments:

- **American adults (209.4 million)**

- **Travelers* (143.3 million adults), including:**
  
  Business travelers (36.9 million, 26% of travelers)
  Pleasure travelers (133.3 million, 93% of travelers)
  Frequent travelers (take five or more trips in the past year: 62.5 million, 44% of travelers)

- **Online travelers (95.7 million travelers who currently use the Internet), including:**
  
  Online travelers who use the Internet for travel plans (63.9 million, 67% of online travelers)
  Online travelers who use the Internet for travel reservations (39.0 million, 41% of online travelers)
  Online business travelers (29.1 million, 30% of online travelers)
  Online pleasure travelers (89.0 million, 93% of online travelers)
  Online frequent travelers (46.4 million, 48% of online travelers)

If you are interested in the complete detailed tables used for this report, please contact the Travel Industry Association research department at (202) 408-8422 for information and pricing. If you are interested in more information about travelers who plan and book leisure travel online, please see TIA’s report *E-Travel Consumers: How They Plan and Buy Travel Online.*

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*A traveler is defined as a person who took at least one trip 50+ miles away from home, one-way, in the past year (not including commuting to/from work or school).*
EXECUTIVE SUMMARY

Current Use of the Internet in the U.S.

- The Travel Industry Association (TIA) estimates that 54 percent of the 209.4 million adults in the U.S. currently use the Internet, up one percentage point from 2001. This translates to 113 million adults and growth of three percent over 2001 when 110 million adults said they used the Internet. Internet penetration among U.S. adults is no longer experiencing the rapid growth seen in the late 1990s.

- Today, 85 percent of the 113 million adults who use the Internet indicate they are travelers, meaning they have taken at least one trip of 50 miles or more away from home in the past year, not including daily commuting. This translates to a market of 96 million travelers who use the Internet (i.e. online travelers).

Use of the Internet Among U.S. Travelers

- This market of 96 million online travelers has grown 256 percent from 1996, when only 27 million travelers used the Internet. Among the 143.3 million U.S. travelers today, 67 percent use the Internet. Frequent travelers taking five or more trips annually, have an even higher likelihood of using the Internet (74%).

- Compared to 2001, the demographic profile of online travelers has shifted slightly. Now, over half (52%) of online travelers are women compared to 49 percent in 2001. A higher share of online travelers have children in the household than last year (48% vs. 43%). Also, half (50%) of online travelers have an annual household income of under $50,000 vs. 46 percent in 2001.

Use of the Internet for Travel Planning and Reservations

- While growth of the online traveler market has slowed, the number of online travelers who actually use the Internet to plan trips has remained relatively stable. A majority (67%) of online travelers say they consult the Internet to get information on destinations or to check prices or schedules. This translates to 64 million online travel planners in 2002, similar to the prior year.

- Not surprisingly, nearly all online travel planners say that some of the trips planned on the Internet in the past year were for pleasure, vacation, or personal purposes. Three in ten say some of the trips planned on the Internet were for business or convention purposes.
• For online travel planning, online travel agency websites (such as Microsoft Expedia, Travelocity, or Priceline), search engine websites, and company-owned websites (airlines, hotels, etc.) are the most popular types of websites used. A majority of online travel planners also use destination websites.

• Online travel planners do a variety of trip planning activities on the Internet. The most popular are searching for airfares/schedules, maps or driving directions, and looking for places to stay.

• While the growth in the number of Americans planning trips online has remained relatively stable, there has been strong growth in online travel booking. Indeed, four in ten (41%) online travelers are booking or making travel reservations online. This may include booking an airline ticket, hotel room, rental car or package tour online. Today, there are 39.0 million online travel bookers, an increase of 25 percent over 2001.

• Nearly all of those who make travel reservations online say they made reservations for pleasure, vacation, or personal purposes. About three in ten say they made reservations for business or convention purposes.

• Among those who have booked travel online, the most popular item to purchase online is airline tickets. A majority of online travel bookers have reserved overnight lodging accommodations, and over one-third have made rental car reservations.

• The most popular types of websites used to book travel are online travel agency sites such as Microsoft Expedia, Travelocity or Priceline and company websites, such as airline, hotel, or rental car companies that sell directly to consumers. More than one-third of online travel bookers pay for or make their reservations using search engine sites.

**Internet Use While Traveling**

• Portable electronic communication devices such as cell phones, laptops, and personal digital assistants help people stay connected while away from home or office. In fact, large majorities of business travelers and pleasure travelers said that they brought cellular telephones with them on a trip taken in the past year. One in four business travelers and pleasure travelers brought a laptop computer with them on a trip, but only about one-tenth of pleasure travelers did so.

• With the advent of wireless technology, portable devices are now being used to access the Internet for information, including travel information. Whether using a computer, cell phone, or PDA, four in ten business travelers say they have gone online while away from home. One in five pleasure travelers also claim to have accessed the Internet while on a past-year pleasure trip.
The TIA Travel Survey estimates that 54 percent of the U.S adult population currently uses the Internet. This translates to 113 million adults and a growth of only three percent over 2001. It is clear that the growth rate of Internet use by Americans has slowed considerably. In 1997, Internet use grew a staggering 70 percent versus just 3 percent in the last 12 months. As the technology matures, Internet penetration among U.S. adults will certainly not experience the rapid, double-digit growth seen in the late 1990s.

Still, there is a high correlation between Internet use and travel. Most (85%) of the 113 million adults who use the Internet indicate they are travelers, meaning they have taken at least one trip of 50 miles or more away from home in the past year, not including daily commuting. This translates to a market of 96 million travelers who use the Internet, or “online travelers.”

*Defined as currently use the Internet at home, at work or school, or both.  
*Source: Travel Industry Association of America
Most (86%) online Americans use the Internet at home; 60 percent go online at work or school. A smaller number (14%) claim that work or school is the only place they access the Internet.

The demographic makeup of online Americans differs considerably from those who do not use the Internet. Average Internet users are younger than non-users, with an average age of 40. Internet users are much more likely than non-users to be married and have children at home. In addition, they are more apt to be college-educated, be employed full-time, and have a higher average annual household income. The following is a more detailed comparison between Internet users and non-users:

- younger average age (40 years vs. 52 years)
- married (57% vs. 48%)
- with children in household (46% vs. 30%)
- some college or more (69% vs. 28%)
- post graduate work (13% vs. 2%)
- employed full-time (65% vs. 38%)
- higher average annual household income ($69,000 vs. $38,000)

Compared to Internet users, non-users of the Internet tend to be older and less educated. Specifically, nearly half of non-users (47%) are age 55 or older, compared to 16 percent of Internet users. A large majority of non-users (72%) have a high school education or less, compared to only 31 percent of Internet users. In addition, one-third (34%) of non-users are retired, compared to only nine percent of users.
Today, two-thirds (67%) of past-year travelers currently use the Internet (online travelers), relatively stable from 2001. The incidence of Internet use has increased progressively from 19 percent of past-year travelers in 1996 to 68 percent in 2001. As would be expected, an even greater percentage (74%) of those traveling frequently (taking at least 5 trips per year) are online. The share of frequent travelers who use the Internet has also grown dramatically from 23 percent in 1996.

Business travelers are somewhat more likely than pleasure travelers to use the Internet. Of the 36.9 million business travelers in the U.S., fully 79 percent use the Internet today. Of the 133.3 million pleasure travelers, 67 percent indicate they go online. This is the same share as for overall past-year travelers because most business travelers are also pleasure travelers.
Reflecting the slower growth in Internet use among the general population, the number of online travelers grew only one percent over 2001. Still, the online traveler market has grown 256 percent since 1996.

A total of 46 million frequent travelers use the Internet today. The growth in Internet use among this group started to slow in 2001 and has continued to slow into 2002. Over the past six years, the number of frequent travelers who use the Internet grew 283 percent.

### Growth in Use of the Internet

<table>
<thead>
<tr>
<th></th>
<th>Past-year Travelers</th>
<th>Frequent Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Users 2002</td>
<td>96 million</td>
<td>46 million</td>
</tr>
<tr>
<td>Growth since 2001</td>
<td>+1%</td>
<td>+2%</td>
</tr>
<tr>
<td>Growth since 2000</td>
<td>+7%</td>
<td>+5%</td>
</tr>
<tr>
<td>Growth since 1999</td>
<td>+25%</td>
<td>+35%</td>
</tr>
<tr>
<td>Growth since 1998</td>
<td>+48%</td>
<td>+44%</td>
</tr>
<tr>
<td>Growth since 1997</td>
<td>+129%</td>
<td>+142%</td>
</tr>
<tr>
<td>Growth since 1996</td>
<td>+256%</td>
<td>+283%</td>
</tr>
</tbody>
</table>

*Defined as currently use the Internet at home, at work or school, or both.

Source: Travel Industry Association of America
When it comes to how travelers access the Internet, the pattern is similar to the general population. Most online travelers (87%) use the Internet at home, but many (63%) online travelers say they use the Internet at work. The same is true for frequent online travelers, where 85 percent go online at home, and about three-fourths (73%) access the Internet at work.

There are slight differences in Internet use between pleasure and business travelers when it comes to where they access the Internet. Not surprisingly, online business travelers are much more likely than pleasure travelers to access the Internet both at home and at work (62% vs. 50%). On the other hand, online pleasure travelers are more likely than business travelers to use the Internet exclusively at home (38% vs. 21%).
Today, slightly more women (52%) than men (48%) travelers are going online. Nearly half (46%) of online travelers are Baby Boomers’ age 35-54 and four in ten (38%) are Generation X and Y adults between 18 and 34. A majority (57%) of online travelers are married and about half (48%) have children at home. About four in ten (39%) are college graduates. A majority (66%) are employed full-time. The average annual household income of online travelers is $71,000, much higher than the U.S. Census Bureau’s 2000 average of $57,047.

In tracking the demographic profile of online travelers, it is clear that the Internet is becoming accessible to a broader demographic base. For example, the share of online travelers who are women has grown steadily over the past several years to 52 percent today. More online travelers in 2002 have children at home compared to last year (48% vs. 43%). Also, the Internet is no longer associated only with affluent traveling households. Today, half (50%) of online travelers have annual household incomes below $50,000 versus 46 percent in 2001 and 40 percent in 2000.

<table>
<thead>
<tr>
<th>DEMOGRAPHIC CHARACTERISTICS</th>
<th>2000 Online Travelers</th>
<th>2001 Online Travelers</th>
<th>2002 Online Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>55%</td>
<td>51%</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>45</td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>40%</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>35-54</td>
<td>47</td>
<td>45</td>
<td>46</td>
</tr>
<tr>
<td>55+</td>
<td>13</td>
<td>18</td>
<td>16</td>
</tr>
<tr>
<td><strong>Household Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under $25,000</td>
<td>17%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>$25,000 - $50,000</td>
<td>33</td>
<td>33</td>
<td>36</td>
</tr>
<tr>
<td>$50,000-74,999</td>
<td>22</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td>$75,000-99,999</td>
<td>15</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>$100,000+</td>
<td>13</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td><strong>Average Household Income</strong></td>
<td>$67,000</td>
<td>$70,000</td>
<td>$71,000</td>
</tr>
<tr>
<td><strong>Median Household Income</strong></td>
<td>$50,000</td>
<td>$53,000</td>
<td>$50,000</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time</td>
<td>67%</td>
<td>69%</td>
<td>66%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College Graduate or More</td>
<td>35%</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Post Graduate Work</td>
<td>15</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>63%</td>
<td>58%</td>
<td>57%</td>
</tr>
<tr>
<td>Single</td>
<td>30</td>
<td>26</td>
<td>30</td>
</tr>
<tr>
<td>Divorced/Separated/Widowed</td>
<td>7</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td><strong>Children in Household</strong></td>
<td>47%</td>
<td>43%</td>
<td>48%</td>
</tr>
</tbody>
</table>

*Median is the point where one-half of traveling families earn more and one-half earn less.

Source: Travel Industry Association of America
Today, nearly 64 million travelers who are online are actually using the Internet for travel planning. This translates to nearly half (45%) of travelers, two-thirds (67%) of online travelers and 31 percent of the general adult population. Online travel planning consists of activities such as getting information on travel products, travel services, destinations, and/or checking prices and schedules. The online travel planner market remains relatively stable in 2002. Indeed, the rate of growth for online travel planning has slowed considerably and reflects the slowing of growth in overall Internet penetration in the U.S.

Online frequent travelers (5 or more trips in the past year) are slightly more likely than all travelers to consult the Internet for travel planning (73% vs. 67%). Currently, 39 million frequent travelers use the Internet for travel planning, up 22 percent from 32 million in 2001.
Online Travel Planning Among Various Market Segments

Again, the majority (67%) of travelers who use the Internet say they plan trips online. Yet this tendency fluctuates when these online travelers are segmented demographically. For example, the incidence of planning travel online rises with annual household income. Also, online travelers in Generation X and Y (age 18-34) and Baby Boomers (age 35-54) are more likely than Matures (age 55+) to plan trips online. Although a majority of online travelers without a college degree plans travel online (61%), this group is much less likely than college graduates to do so.

Incidence of Online Travel Planning
Among Online Travelers Who Are:

<table>
<thead>
<tr>
<th>Category</th>
<th>Incidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>66%</td>
</tr>
<tr>
<td>Female</td>
<td>68%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>67%</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>70%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>56%</td>
</tr>
<tr>
<td>Household Income Under $25,000</td>
<td>48%</td>
</tr>
<tr>
<td>Household Income $25,000 - $50,000</td>
<td>65%</td>
</tr>
<tr>
<td>Household Income $50,000- $74,999</td>
<td>64%</td>
</tr>
<tr>
<td>Household Income $75,000+</td>
<td>84%</td>
</tr>
<tr>
<td>College Graduate</td>
<td>76%</td>
</tr>
<tr>
<td>Not College Graduate</td>
<td>61%</td>
</tr>
<tr>
<td>Married</td>
<td>72%</td>
</tr>
<tr>
<td>Not Married</td>
<td>58%</td>
</tr>
<tr>
<td>Have Children in Household</td>
<td>66%</td>
</tr>
<tr>
<td>No Children in Household</td>
<td>67%</td>
</tr>
</tbody>
</table>
Purpose of Trips Planned Online

Not surprisingly, nearly all (95%) online travel planners say that some trips they planned on the Internet in the past year were for pleasure, vacation, or personal purposes. Three in ten (30%) say some of the trips planned on the Internet were for business or convention purposes.

![Pie chart showing purpose of trips planned online.](image)

Source: Travel Industry Association of America

Portion of Planning Done Online

While there is slow growth in the number of online travelers using the Internet to plan trips, these travelers are doing more trip planning online. About seven in ten (69%) online travel planners do at least half of their travel planning online, much higher than in 2001 (56%). Four in ten (42%) do all or most of their travel planning online, compared to 29 percent last year.

![Pie chart showing portion of travel planning done through the Internet.](image)

Source: Travel Industry Association of America
Thus, most (84%) online travel planners say they do not do all of their travel planning online. These travel planners claim to use a number of other sources for travel information, the most popular being friends, family or co-workers (58%), and/or airline, hotel, or rental car companies (41%). Other sources of information include: travel agents (35%); travel guides, books or magazines (38%); newspapers (23%); and city, state or country tourism offices (15%).

All of these sources show a decline in usage from 2001. Indeed, online travel planners who say they do not do all of their travel planning online are much less likely than last year to claim they called or visited travel companies (41% vs. 62%) and travel agents (35% vs. 53%).

![Other Planning Sources Used](chart)

Source: Travel Industry Association of America
Types of Internet Sites Used For Online Travel Planning

Many online travel planners use more than one travel website to plan their trips. Today, the most often used websites for travel planning are online travel agency sites, such as Microsoft Expedia, Travelocity, or Priceline (62%) and search engine sites (62%). Travel company websites such as those for airlines, lodging, and rental car companies (59%) are also popular. Destination websites are also very popular with online travel planners (51%). Other types of sites used for travel planning include: special interest sites such as business, financial, cooking, wine or skiing sites (21%); travel guide sites such as Fodor’s, Frommer’s or Lonely Planet (17%); newspaper or magazine websites (16%); and community websites (8%).

Compared to last year, there have been shifts in the popularity of certain types of travel websites. The usage of newspaper or magazine websites for travel planning shows an increase of four percentage points from 2001. On the other hand, not as many online travel planners are using destination websites (51% vs. 63% in 2001), company sites (67% vs. 59%), and search engine sites (62% vs. 69%) as they did last year.

![Types of Internet Sites Used for Travel Planning](chart)

Source: Travel Industry Association of America
Types of Travel Planning Done Online

For trips planned on the Internet, online travel planners do a variety of planning activities. They most often search for airfares or schedules (66%), maps or driving directions (66%), and/or places to stay (60%). Many (44%) online travel planners are cost conscious, saying they searched the Internet for travel discounts or promotions. One-third indicate they searched for travel packages (33%) and/or rental car prices (32%) as part of their online travel planning activities.

Destination-related planning is also reflected in online travel activities. Nearly half (45%) of online travel planners search for things to do at the destination. Searching for dining/entertainment options (36%) and local event calendars (35%) are popular as well. In addition, three in ten (31%) online travel planners claim they use the Internet to search for destinations to visit.

Types of Travel Planning Done Online for Trips in Past Year
(Among 63.9 Million Online Travelers Who Used the Internet to Make Travel Plans)

- Searched for airfares/schedules: 66%
- Searched for maps/driving directions: 66%
- Searched for places to stay: 60%
- Searched for things to do: 45%
- Searched for travel discounts or promotions: 44%
- Searched for dining/entertainment: 36%
- Searched local event calendars: 35%
- Searched for travel packages: 33%
- Searched for rental cars: 32%
- Searched for places to go: 31%

Source: Travel Industry Association of America
Demographics of Online Travel Planners

Over half (53%) of online travel planners are women, 47 percent are men. A majority are married and nearly half have children at home. Online travel planners tend to be Baby Boomers age 35 to 54. Most have full-time jobs. Over four in ten have a college degree. The average annual household income of online travel planners is $79,000, higher than that of online travelers in general.

<table>
<thead>
<tr>
<th>DEMOGRAPHIC CHARACTERISTICS</th>
<th>Online Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Size (millions)</td>
<td>63.9</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>47%</td>
</tr>
<tr>
<td>Female</td>
<td>53%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>38%</td>
</tr>
<tr>
<td>35-54</td>
<td>48%</td>
</tr>
<tr>
<td>55+</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Household Income</strong></td>
<td></td>
</tr>
<tr>
<td>Under $25,000</td>
<td>9%</td>
</tr>
<tr>
<td>$25,000 - $50,000</td>
<td>35%</td>
</tr>
<tr>
<td>$50,000- $74,999</td>
<td>20%</td>
</tr>
<tr>
<td>$75,000- $99,999</td>
<td>16%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>20%</td>
</tr>
<tr>
<td>Average Annual Household Income</td>
<td>$79,000</td>
</tr>
<tr>
<td>Median Household Income*</td>
<td>$58,000</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
</tr>
<tr>
<td>Full-time</td>
<td>68%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
</tr>
<tr>
<td>College Graduate or More</td>
<td>44%</td>
</tr>
<tr>
<td>Post Graduate Work</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>62%</td>
</tr>
<tr>
<td>Single</td>
<td>30%</td>
</tr>
<tr>
<td>Divorced/Separated/Widowed</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Children in Household</strong></td>
<td>47%</td>
</tr>
</tbody>
</table>

*Median is the point where one-half of traveling families earn more and one-half earn less. Source: Travel Industry Association of America
While the number of Americans planning trips online has leveled off, online travel booking is still showing continued growth. In fact, the percentage of “lookers who don’t book” continued to decline in 2002 to 39 percent.

Today, 27 percent of all travelers are actually booking or making travel reservations online. This translates to 41 percent of online travelers and 61 percent of online travel planners (39 million online travelers). (Travel reservations include the actual booking or purchasing of an airline ticket, hotel room, rental car, package tour, etc.) Among online travelers, online travel booking shows an increase of 25 percent over 2001 and 58 percent over 2000.

Of the 39 million online travelers who book travel online, about 22 million are frequent travelers (5 or more trips in the past year). The size of this market has grown 26 percent compared to 2001.
Purpose of Trips Booked Online

Nearly all (96%) of those who make travel reservations online, say they made reservations for pleasure, vacation, or personal purposes. About three in ten (28%) online travel bookers say they made reservations for business or convention purposes.

Portion of Travel Booking Done Online

Most (70%) of those who make travel reservations online are using the Internet to do at least half of their travel booking. This share is up significantly from 2001 (56%), suggesting that online travel bookers are doing more booking online this year. Nearly one in four (23%) online travel bookers claim they make all of their travel purchases online, versus 17 percent last year.
Travel Products/Services Purchased Online

For online travel bookers, airline tickets are the most-often purchased travel products (77%). Six in ten online travel bookers (57%) claim they reserved overnight lodging, and more than one-third (37%) made rental car reservations. Other travel-related products most often bought online include cultural event tickets (25%) and sports events tickets (18%). Also, one in five online travel bookers (21%) used the Internet to purchase a travel package which includes transportation and lodging in one price. Thirteen percent made reservations for personal sporting activities, like golf, skiing, or water sports. A small percentage used the Internet to book a cruise (6%) or get tickets for a tour or excursion (6%)

Compared to last year, online travel bookers are less likely to claim they made rental car reservations and/or reserved overnight lodging. Yet, online travel bookers are more likely than last year to say they used the Internet to purchase a travel package. The shares of online travel bookers reserving other travel products or services remain relatively stable from last year.

![Bar chart showing travel products/services purchased online in past year](chart.png)

*First asked in 2002.
Source: Travel Industry Association of America
Annual Online Travel Spending

Yearly spending on online travel products and services continues to rise. In 2002, over half (51%) of online travel bookers spent $1,000 or more for online travel products in the past year. The share of online travel bookers who have spent $2,500 or more saw measurable growth in 2002 compared to the prior year (31% vs. 26%). Today, online travel bookers spend an average of about $2,300 online in a year, up from $2,200 last year.

Annual Amount Spent on Travel Services Over the Internet
(Among 39.0 Million Online Travelers Who Booked Travel Online)

*Median is the point where one-half of the travelers spent less and one-half spent more.
Source: Travel Industry Association of America

2002 Mean = $2,324
2002 Median* = $1,113
Types of Internet Sites Used For Online Travel Booking

This year, the most popular websites for booking travel are online travel agency sites and airline, hotel, rental car or package tour company sites (61% and 57% of online travel bookers, respectively). Not as many online travel bookers report using company sites to book travel compared to last year. More than one-third (37%) of online travel bookers pay or make their reservations on search engine sites such as Yahoo. Destination sites are used for booking travel by one in five (20%) online travel bookers.

Source: Travel Industry Association of America
When comparing websites used for planning versus booking, online travel agency sites such as Expedia and Travelocity and travel company sites are very popular for both activities. While one in five (20%) travel bookers make reservations on destination websites for states, cities, and countries, these websites are much more popular for travel planning (51%).

<table>
<thead>
<tr>
<th>Type of Web Site</th>
<th>Online Travelers</th>
<th></th>
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<tbody>
<tr>
<td></td>
<td>Travel Planners</td>
<td>Travel Bookers</td>
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<tr>
<td>Online Travel Agency Sites</td>
<td>62%</td>
<td>61%</td>
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<tr>
<td>Search Engine Sites</td>
<td>62</td>
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<td>Company Sites</td>
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<td>Destination Sites</td>
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<td>Special Interest Sites</td>
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<td>Travel Guide Sites</td>
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<td>Newspaper or Magazine Sites</td>
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<td>10</td>
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<tr>
<td>Community Sites</td>
<td>8</td>
<td>5</td>
</tr>
</tbody>
</table>
Demographics of Online Travel Bookers

Over half (56%) of those who book travel on the Internet are women, 44 percent are men. Majorities are married, Baby Boomers age 35-54, and employed full-time. Nearly half have children at home. Half have completed college. The average annual household income of online travel bookers is $86,000.

Compared to last year, there are some changes in the demographics of online travel bookers. The share of online bookers who are women shows a large increase (56% vs. 46% in 2001.). Also, the share of online bookers who are Baby Boomers is up this year (53% vs. 45%). Correspondingly, there is a smaller share of younger online travel bookers versus last year (34% vs. 41%).

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*Median is the point where one-half of traveling families earn more and one-half earn less.
Source: Travel Industry Association of America
Of the nearly 64 million travelers who have planned or booked travel online in the past year, nearly all (95%) claim they are either extremely satisfied or satisfied with their most recent Internet travel experience. Very few of these consumers are disappointed with the online travel experience.

Source: Travel Industry Association of America
About 32 million travelers who use the Internet do not do travel planning or booking online. Yet, more than one-third (36%) of this group claim they are very or somewhat likely to use the Internet next year for travel planning or reservations. Nearly four in ten (38%) of those who do not use the Internet for travel say that they are not at all likely to use it in the next year either—up from 31 percent last year. This is further evidence that the growth rate for online travel will likely continue to slow.

Next Year Likelihood of Internet Travel Planning
(Among 31.8 Million Online Travelers Who Did Not Use the Internet for Travel Planning)

- Very Likely: 15%
- Somewhat Likely: 21%
- Not Very Likely: 26%
- Not at All Likely: 38%

Source: Travel Industry Association of America
The use of portable electronic communication devices while traveling is related to using the Internet for travel planning and booking. Cellular phones, portable personal computers, and handheld personal digital assistants now can access the Internet, helping travelers stay connected while away from home or office. Not surprisingly, business travelers are more likely to use portable communication devices while traveling than pleasure travelers.

Today, 42 percent of business travelers say they have gone online while away from home. About one in five (22%) pleasure travelers also claim to have accessed the Internet while on a past-year pleasure trip. There has been little change since last year.

Source: Travel Industry Association of America
Of the 37 million past year business travelers, a majority (69%) said that they brought their cellular phone with them on a business trip taken in the past year. One in four (25%) business travelers brought a laptop computer. Sixteen percent carried a handheld personal digital assistant (PDA) with them on business trips, and 13 percent carried a pager or beeper.

With time, traveler preferences towards portable electronic communication devices change. For example, the share of travelers taking along a cellular phone on business trips grew considerably from 1999 to 2001, yet this figure remains stable this year. On the other hand, the share of travelers bringing along a handheld personal digital assistant on business trips continues to rise, but the share bringing along a pager or beeper on such trips continues to decline.

Items Taken Along on Past-Year Business/Convention Trip
(Among 36.9 Million Business/Convention Travelers)

Note: Multiple responses allowed.
Source: Travel Industry Association of America
Six in ten (61%) pleasure travelers brought a cellular phone and nine percent claimed to bring a pager with them on pleasure or vacation trips. Pleasure travelers are much less likely to bring a laptop computer than those on business trips, although, one in ten (9%) pleasure travelers did so. Just five percent of pleasure travelers carried a handheld personal digital assistant along with them.

The share of travelers taking along a cellular phone on pleasure trips has risen remarkably from 2000. The percentages of pleasure travelers bringing along a laptop and/or a handheld personal digital assistant remain relatively flat. Though, just like for business travelers, the share bringing along a pager or beeper on pleasure trips continues to decline.

Note: Multiple responses allowed.
Source: Travel Industry Association of America
APPENDICES
TIA TRAVEL SURVEY METHODOLOGY

The TIA Travel Survey is based upon data collected each quarter by telephone interviews from a national probability sample of adults (ages 18+) representing the total adult, civilian, non-institutional population of the contiguous United States. In each of the months of January, April, July and October of 2002, 1,300 interviews were completed.

The sample design consists of a sampling frame comprised of all active Working Residential Hundred Blocks in the United States. A Working Residential Block is defined as a block of 100 potential telephone numbers -- Area Code-Exchange-Next 2 digits -- that contains 15 or more residential listings in current published telephone directories. This information is updated annually and cross checked against telephone company sources to assure completeness and accuracy.

For sample generation, Working Residential Blocks are selected on a systematic nth basis, in one stage. A 2-digit random number is appended to each selected Working Residential Block to form a complete telephone number in order to produce a random sample of both unlisted and listed numbers.

This sample design assures proper sample representation of listed and unlisted households and of all geographic sub-units (e.g. ZIP code, County, Area Code and Exchange). The entire sampling frame represents 98% of all telephone households. There is an equal probability for each telephone number to be drawn for the sample.

A new national probability sample is drawn for each wave of the study. Numbers for each sample are drawn on a 4 to 1 ratio to expected completions. Each sample consists of 4,800-6,000 randomly generated numbers drawn in replicates of 1,300 numbers each, representing its own modified national probability sample. The modification to sampling boosts the Mountain region from 5% to 10% of the sample to ensure a stable base in this region. All regions are later weighted back to proper national proportions. The purpose of multiple replicates is to assure that each number receives a first attempt and 3 additional callback attempts. This procedure increases the possibility of reaching a representative population.

Individuals within households are randomly selected using the next birthday method. This method again increases the probability of any adult in any household being selected for the sample.

The sample selection and interviewing methods described above ensure a respondent base which duplicates the distribution of the actual contiguous United States population. Any slight variances are corrected by sample balancing on key demographic characteristics (age, gender, household size and census region of residence). The results of the TIA Travel Survey have a margin of error of +/- 3% at the 95% confidence level.
ASK ALL RESPONDENTS.

Now I would like to ask you a few questions about using the Internet.

1. Do you currently use the Internet and/or World Wide Web either at work or school, at home, or both? (DO NOT READ LIST. CHECK ONLY ONE RESPONSE)

   Home Only ................................ 1
   Work or School Only.................. 2
   Both ........................................... 3
   Do Not Use the Internet.......... 4
   Use somewhere else only ......... 5
   Don’t Know ............................... dk

IF RESPONSE IS “DO NOT USE THE INTERNET”, “SOMEWHERE ELSE”, OR “DON’T KNOW” IN Q1, SKIP TO NEXT SECTION. OTHERS CONTINUE.

2. DELETED

3. In the past year, have you used the Internet to make travel plans? By travel plans, I mean things like getting information on destinations or checking prices and schedules on the Internet.

   Yes............................................. 1   (CONTINUE)
   No............................................... 2  
   Don’t know .................................dk  

4. DELETED

5. During the past year, how much of your travel planning did you do on the Internet? Would you say you did...(READ LIST. CHECK ONLY ONE RESPONSE)

   All or 100%...................................................... 1
   75% to 99%................................................... 2
   50% to 74%................................................... 3
   25% to 49%................................................... 4
   Less than 25% ............................................. 5
   (DO NOT READ)  Don’t Know................................................... dk
6. Were any of the trips planned on the Internet in the past year for… (READ LIST. CHECK ONLY ONE RESPONSE.)

   Business or convention purposes ....................... 1
   Pleasure, vacation or personal purposes ............. 2
   Or both ....................................................... 3

(DO NOT READ) Don’t Know .................................................. dk

7. I am going to read you a list of different types of websites. For each one, please tell me whether or not you used that type of Internet site for travel planning in the past year. (READ LIST. RECORD RESPONSE BEFORE MOVING ONTO THE NEXT STATEMENT. CHECK AS MANY AS APPLY.)

   Online travel agency web sites like Microsoft Expedia, Travelocity, Orbitz, or Priceline.com ................................................................. 1
   Company sites like those for airlines, hotels, rental cars or tours .......... 2
   Search engine sites like Yahoo, Excite or AOL .................................. 3
   Destination sites like those for a city, state, or attraction .................. 4
   Travel guidebook sites like those for Fodors, Frommers or Lonely Planet ................................................................. 5
   Newspaper or magazine sites such as New York Times, or Conde Nast Traveler .......................... 6
   Community sites such as iVillage.com ............................................. 7
   Special interest sites such as financial websites, cooking, wine, skiing ................................................................. 8

(DO NOT READ) Don’t know .......................................................... dk

IF Q5=2, 3, 4, OR 5 CONTINUE, OTHERWISE SKIP TO Q9.

8. Since you did not do all or 100% of your travel planning on the Internet during the past year, what other sources for information about destinations, prices and schedules did you use for travel planning? (READ LIST. CHECK AS MANY AS APPLY.)

   Phone calls or visits to travel agent or agency .......... 1
   Phone calls or visits direct to airline, hotel, car rental or other travel company .............. 2
   Phone calls or visits to a city, state, or country tourism office or chamber of commerce ........ 3
   Travel guides, books or magazines .......................... 4
   Newspaper travel section ....................................... 5
   Friends, family, co-workers ................................... 6
   Did not travel in the past year ................................. 8
   Don’t know ....................................................... dk

(DO NOT READ)
9. I am going to read you a list of different types of travel planning you can do online. Thinking about trips you planned using the Internet in the past year, which types of travel planning did you do online? (READ LIST STARTING WITH "X". CHECK AS MANY AS APPLY.)

START WITH "X"

[ ] Searched for places to go, meaning you hadn’t chosen a destination yet ...................... 1
[ ] Searched for airline fares and schedules/flight times .................................................... 2
[ ] Searched for rental car prices and availability ............................................................. 3
[ ] Searched for hotel prices or places to stay ................................................................. 4
[ ] Obtained maps and/or driving directions .................................................................... 5
[ ] Searched for things to do at the destination ............................................................... 6
[ ] Searched for travel packages, such as cruises, resort packages, etc. ........................ .... 7
[ ] Searched local event calendars at the destination ....................................................... 8
[ ] Searched for dining and entertainment at the destination ........................................... 9

(READ Searched for any type of travel discount or promotion ................................................. 10 LAST)

10. In the past year, have you used the Internet to make travel reservations? By travel reservations, I mean actually booking or paying for something like an airline ticket, hotel room, rental car or travel package tour on the Internet.

   Yes ........................................ 1  (CONTINUE)
   No ........................................ 2
   Don’t know ......................... dk  

(Skip to Q. 16)

11. In the past year, how many of your travel reservations did you make through the Internet?
   Would you say you made… (READ LIST. CHECK ONLY ONE RESPONSE)

   All or 100% ........................................ 1
   75% to 99% ....................................... 2
   50% to 74% ....................................... 3
   25% to 49% ....................................... 4
   Less than 25% .................................. 5

(Do NOT READ) Don’t Know .................................................. dk

12. Did you use the Internet in the past year to make travel reservations for …
   (READ LIST. CHECK ONLY ONE RESPONSE.)

   Business or convention purposes ................. 1
   Pleasure, vacation or personal purposes .......... 2
   Or both ........................................... 3

(Do NOT READ) Don’t Know .................................................. dk
13. Which types of Internet sites did you use for making travel reservations? For travel reservations, I mean actually booking, reserving or paying for something like an airline ticket, hotel room, rental car or package tour. (READ LIST. CHECK AS MANY AS APPLY.)

- Online travel agency web sites like Microsoft Expedia, Travelocity, Orbitz, or Priceline.com .......................................................... 1
- Company sites like those for airlines, hotels, rental cars or tours .... 2
- Search engine sites like Yahoo, Excite or AOL ................................. 3
- Destination sites like those for a city, state, or attraction .............. 4
- Travel guidebook sites like those for Fodors, Frommers or Lonely Planet ................................................................. 5
- Newspaper or magazine sites such as New York Times, or Conde Nast Traveler ................................................................. 6
- Community sites such as iVillage.com ............................................ 7
- Special interest sites such as financial websites, cooking, wine, skiing ................................................................. 8

(DO NOT READ)  Don’t know ............................................................................................................ dk

14. Please tell me which of the following products or services you have purchased or reserved online specifically for a trip you have taken in the past year. (READ LIST. CHECK AS MANY AS APPLY.)

- Airline ticket ...................................................................................... 1
- Overnight lodging accommodations .................................................. 2
- Rental car ........................................................................................... 3
- Cruise ................................................................................................. 4
- Travel package that included at least transportation and a place to stay all in one price ................................................. 5
- Tickets for an amusement park .......................................................... 6
- Tickets for a play, show or concert .................................................... 7
- Tickets for a spectator sporting event ................................................ 8
- Tickets for a museum, festival, or other event .............................. 9
- Tickets for a tour or excursion ........................................................ 10
- Reservations for personal sporting activities, like golf, skiing or water sports ................................................................. 11

(DO NOT READ)  Don’t know ............................................................................................................ dk
15. In the past year, what was the combined amount of money you paid for all travel products and services you purchased online? Was it… (READ LIST. CHECK ONLY ONE RESPONSE)

- Less than $250 ...................................................................... 1
- $250 to less than $500........................................................... 2
- $500 to less than $1,000........................................................ 3
- $1,000 to less than $2,500..................................................... 4
- $2,500 to less than $5,000..................................................... 5
- $5,000 to less than $7,500..................................................... 6
- $7,500 to less than $10,000................................................... 7
- $10,000 or more ................................................................. 8

(DO NOT READ) Don’t know ...................................................... dk

16. Thinking of the most recent time you used the Internet for making travel plans or reservations, were you extremely satisfied, satisfied, disappointed or extremely disappointed with the experience? (DO NOT READ LIST. CHECK ONLY ONE RESPONSE.)

- Extremely Satisfied .....................1
- Satisfied .......................................2
- Disappointed................................3      (SKIP TO NEXT SECTION)
- Extremely Disappointed ..............4
- Don’t know....................................dk

IF “NO” OR “DON’T KNOW” TO Q.3, ASK Q.17. OTHERS SKIP TO NEXT SECTION.

17. In the next year, how likely are you to use the Internet for travel planning? Would you say you are… (READ LIST. CHECK ONLY ONE RESPONSE.)

- Very Likely.............. 1
- Somewhat Likely..... 2
- Not Very Likely...... 3
- Not At All Likely..... 4

(DO NOT READ) Don’t Know ............ dk
DEMOGRAPHICS

ASK EVERYONE:

And now just a few questions so we may classify your responses...

D1. What is your marital status?

MARRIED........................................................................................... 1
SINGLE, NEVER MARRIED........................................................ 2
DIVORCED ..................................................................................... 3
SEPARATED .................................................................................. 4
WIDOWED.................................................................................. 5

(DO NOT READ) REFUSED ........................................................................ ref

D2. Are you... (READ LIST)

EMPLOYED FULL-TIME................................................................. 1
EMPLOYED PART-TIME ................................................................ 2
RETIRED ..................................................................................... 3
NOT EMPLOYED........................................................................ 4

(DO NOT READ) REFUSED ........................................................................ ref

D3. Which of the following best describes your education level? (READ LIST)

LESS THAN HIGH SCHOOL ......................................................... 1
COMPLETED HIGH SCHOOL ...................................................... 2
SOME COLLEGE, NOT COMPLETED.......................................... 3
COMPLETED COLLEGE ............................................................. 4
POST GRADUATE WORK STARTED OR COMPLETED......... 5

(DO NOT READ) REFUSED ........................................................................ ref
D4. What is your age? ____________________

D5. How many adults, age 18 and over, live in your household at the present time? Please include yourself in this number. ____________________

D6. How many children, under age 18, if any, live in your household at the present time? ____________________

D7. Now, I would like to read a series of income groups. Please stop me when I read the group which describes your total family income, from all sources in one year? (IF RESPONDENT INQUIRES - WE ARE ASKING ABOUT INCOME BEFORE TAXES)

LESS THAN $15,000 ..................................................... 1
$15,000 TO LESS THAN $20,000 ................................ 2
$20,000 TO LESS THAN $25,000 ............................. 3
$25,000 TO LESS THAN $30,000 ................................ 4
$30,000 TO LESS THAN $40,000 ......................... 5
$40,000 TO LESS THAN $50,000 ............................. 6
$50,000 TO LESS THAN $75,000 ......................... 7
$75,000 TO LESS THAN $100,000 ............................ 8
$100,000 TO LESS THAN $250,000 ...................... 9
$250,000 OR MORE .................................................... 10
(DO NOT READ) REFUSED..............................ref

D8. Would you describe yourself as...

WHITE ................................................................. 1
AFRICAN AMERICAN OR BLACK ................. 2
ASIAN OR PACIFIC ISLANDER ..................... 3
NATIVE AMERICAN OR ALEUTIAN ESKIMO..... 4
OTHER ................................................................. 5
(DO NOT READ) REFUSED..............................ref

D9. Are you of Spanish or Hispanic origin or descent?

YES ........................................................................ 1
NO ........................................................................... 2
(DO NOT READ) REFUSED..............................ref

D10. GENDER:

MALE ........................................................................... 1
FEMALE ................................................................. 2

THANK RESPONDENT