



I live

# Travellers' Pulse Survey



therefore I travel



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# Introduction 1





# Introduction

Welcome to the inaugural Travellers' Pulse survey. Produced by Lonely Planet in conjunction with STA Travel, VisitBritain, ISTC, Hostelling International and MTV, this survey provides an up to date snap shot of the global travel environment.

Travel is a passion for Lonely Planet, our partners and for our consumers; it's absorbing, educating and often liberating. As with all industries the environment constantly changes, new trends surface, while some old habits die hard, so Lonely Planet and its partners went about creating the largest ever survey of its kind to test the mood of the travelling community.

We wanted to better understand travellers, to explore why travel is so important and life changing for so many people, to find out where people are travelling, and to gauge the key trends of the moment. Travellers' Pulse offers a vehicle to investigate and understand these issues and to set up a process ensuring that we remain abreast of travellers' needs.

Travellers' Pulse was wide reaching, achieving 20,000 respondents from 167 countries from a spread of age groups. The survey was live on [lonelyplanet.com](http://lonelyplanet.com) throughout December 2004. The response rate is testimony to the global footprint of Lonely Planet and its partners, and our ability to reach travellers from all walks of life and from all corners of the globe. This ensures a truly global result.

We hope that others can benefit from our hard work and obtain a better understanding of the independent travel community. Travellers' Pulse provides a powerful insight into the key themes that makes up the travel experience and provides a platform for more targeted work in the future.

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# Lonely Planet Partners



For more than 50 years, members of the International Student Travel Confederation (ISTC) have provided full-time students and youth under 26 with unique products and services such as flexible and discounted airline tickets, travel insurance, discounts on local, national, and international bus, rail and urban transport systems, and opportunities for study and working holiday programmes abroad. The ISTC also administers the International Student Identity Card (ISIC) – the only international proof of full-time student status. Today the ISTC network of leading student travel organisations includes over 5000 specialist student travel offices in 110 countries worldwide.



Hostelling International is the brand name of the International Youth Hostel Federation, the organisation that represents Youth Hostel Associations worldwide. Today, Hostelling International is one of the world's biggest membership organizations for youth, and offers its 3.5 million members a choice of over 4,000 accommodation centres in 78 countries worldwide. Despite their name, Hostelling International pioneered global booking systems for the budget accommodation sector, and its online system [www.HIhostels.com](http://www.HIhostels.com) enables travellers to check availability and book accommodation anytime, anywhere – up to six months in advance.



STA Travel is the world's largest travel company for students and young people. Since its inception in 1979, STA Travel has experienced exponential growth in size and sales. Today the company turns over US \$1.1 billion a year, services more than 2.5 million travellers annually and employs over 2,600 staff worldwide. STA Travel operates more than 400 wholly owned retail locations in Australia, Austria, Canada, Denmark, Finland, Germany, Hong Kong, Japan, Malaysia, New Zealand, Norway, Singapore, South Africa, Sweden, Switzerland, Thailand, UK and the USA. The company is represented in a total of 85 countries via a mix of wholly owned retail branches, franchisees and licensees.



VisitBritain was created on 1 April 2003 to market Britain to the rest of the world and England to the British. Formed by the merger of the British Tourist Authority and the English Tourism Council, its mission is to build the value of tourism throughout Britain by creating world-class destination brands and marketing campaigns. Active in 32 overseas markets, VisitBritain also builds partnerships with - and provides insights into – other organisations that have a stake in British and English tourism.



MTV Europe is Europe's largest 24-hour music television network, reaching more than 120 million households in 48 territories via terrestrial, cable, satellite, digital, and broadband. MTV Europe currently comprises the following channels: MTV España, MTV European, MTV France, MTV Central, MTV2 Pop, MTV Italia, MTV NL, MTV Nordic, MTV Polska, MTV Classic, MTV Portugal, MTV Romania, MTV UK & Ireland, VH1 UK and VH1 European. MTV Europe also owns TMF in Holland, which runs alongside MTV NL, and there are 6 digital channel brands available in the UK - MTV Dance, Base, Hits, MTV2, VH1 Classic and VH1 European Classic, and 20 localised online services. All brands are specifically tailored to satisfy the tastes and nuances of each market including local presenters, programming and playlists.

# Executive Summary

Travellers' Pulse focused on broad travel and lifestyle related issues, providing a snapshot of key behaviours. Some results were surprising and some clear trends have been uncovered. The most positive news from Travellers' Pulse is that people are now travelling more than ever and travel has never been more relevant and important to so many people's lives.

From a destination perspective, Europe and Asia continue to be the most popular regions in the world; this finding was consistent across all age groups. Australia performs extremely well being named travellers' favourite country visited as well as country most desirable to visit.

We are travelling more than ever, which is an encouraging sign and consistent with other research. Short breaks are a growing trend and the longer, more intrepid adventures are still incredibly relevant in helping fuel this growth. All of this is supported by a general attitude which suggests travel is 'extremely important' to the majority of respondents.

Individuals' motivations for travelling provided some diverse results. A combination of seeking a sense of adventure, the excitement of being in a new place and the ability to relax and escape life made up the most favoured results. Not surprisingly, barriers to travel centred on the lack of money and lack of time for travel.

Generally, respondents were independent travellers. There does not seem to be an overwhelming preferred companion for travel with responses varying between travelling alone, with friends, with family and with partners. Drilling down on age, there's a more noticeable trend of younger respondents preferring to travel alone or with friends whilst older respondents tend to travel with partners or family.

The internet was clearly the preferred travel information source followed by guidebooks. Interestingly travel agents and mainstream travel media polled low when respondents were asked how they research travel options, however, when it comes to actually booking travel, the traditional travel agent polled highly.

And finally about the respondents. The survey was skewed to the 18-35 age group predominantly from the UK, North America and Australasia. Most respondents were tertiary educated and either still studying or within a professional position. There was a mixture of married and single respondents and a variety of living arrangements.

# Analytical Framework

## Sample Size

The survey began on 23 November 2004 and ran until 30 December 2004. During that period there were a total of 19,897 respondents, of which test data and duplicate responses were removed. This left a sample size of 19,446. Although some respondents did not answer every question, they were still included in the overall sample. It is estimated that on average, each question had an approximate sample of 16,000 responses.

	Amount
Total Responses	19,897
Less Test Data	67
Less Duplicates	384
Total Sample Size	19,446

## Sample Bias

The survey was offered online only and not in other more traditional forms. In total, access was via 6 websites which all had a travel or lifestyle focus. As a result, the survey is biased towards people, age groups and social status that have higher internet connectivity and usage rate as well as an existing interest in travel. It is important to note this when quoting or using analysis obtained from the survey.

## Other Survey Resources

- Lonely Planet 30th Anniversary Survey
- WTO World Tourism Barometer, Vol 3, No 1, January 2005-03-21
- Study in Chinese Tourism, WTO-ETC Joint Research on China
- New Horizons in Independent Youth and Student Travel, A report for the International Student Travel Confederation (ISTC) and the Association of Tourism and Leisure Education (ATLAS) by Greg Richards and Julie Wilson.



# Respondent Demographics

## 2



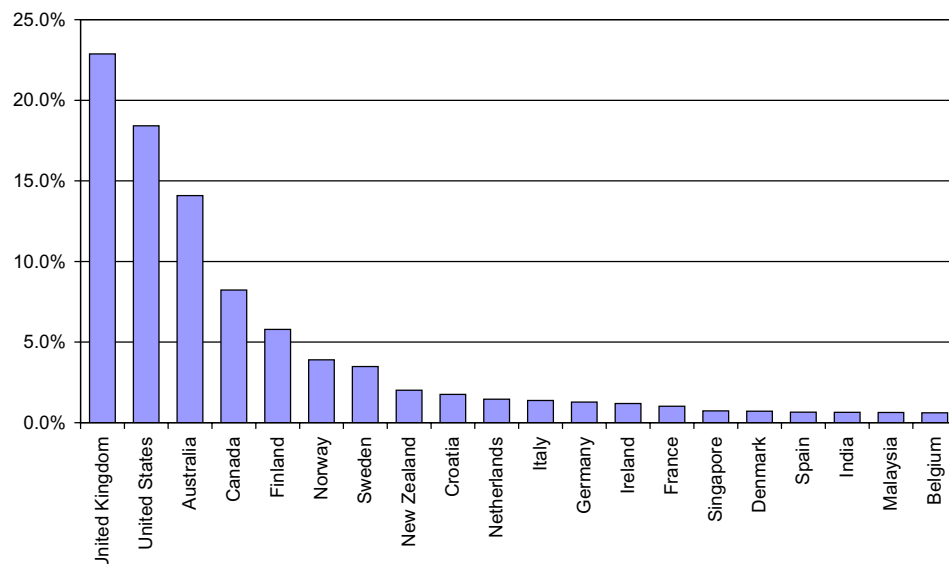




# Country of Residence

The survey attracted respondents from a total of 167 countries. This is an excellent coverage of the world and demonstrates the global footprint of Lonely Planet and its partners. As expected, the bulk of respondents (55%) came from the UK, North America and Australia.

## Top 20 Responding Countries – Global



## Points of Interest

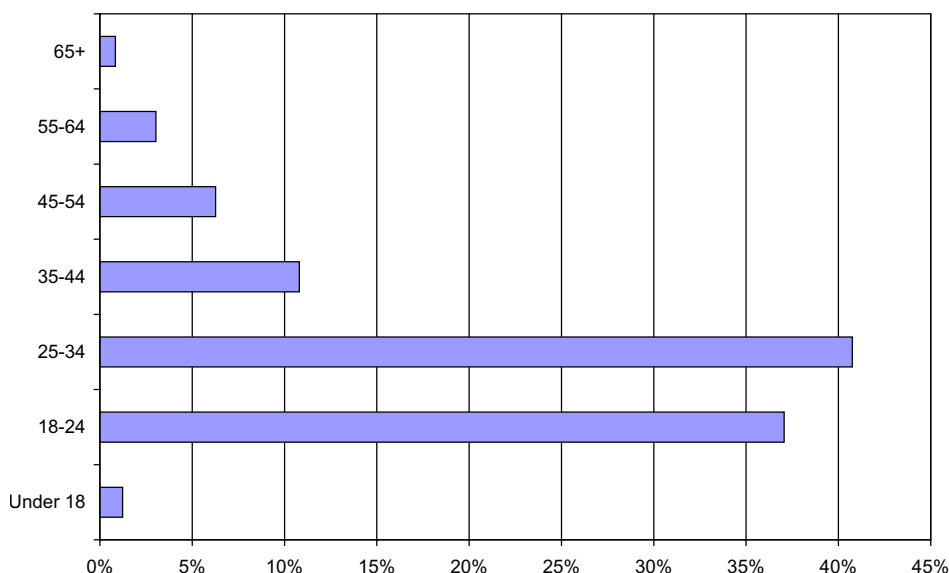
- The level of interest in outbound independent travel in Croatia appears to be on the rise, with the nation ranking ninth out of 167. The previous year's Lonely Planet 30th Anniversary survey had Croatia listed at 46 out of 141 countries.
- Interestingly, there was not one respondent from China. This is likely to be the result of the distribution method and the use of a single language (English), as WTO research clearly demonstrates that outbound tourism in China has more than doubled since 1999. With the GDP growth rate in China estimated to be around 7% to 8% until 2010, disposable income of Chinese residents will steadily increase. This will translate to an increase in spending on leisure items, which includes travel.
- India is another entry in the top 20 worth noting. According to WTO statistics, outbound tourism grew by 8% from 1999 to 2002 and is expected to grow a further 25% this year based on the 2002 result. Like China, India's GDP is on the rise, which means higher disposable income and the increased likelihood of growth in outbound tourism.

**No surprises in the top eight: residents from the UK, the US, Australia, Canada, Finland, Norway, Sweden and New Zealand are all typical travellers.**

# Age Group

Of the surveyed travellers, 78% were under the age of 34 – overwhelmingly the majority of respondents. Within this, the largest age group was 25–34 (41%), followed by respondents aged 18–24 (37%). While this comes as no real surprise, given Lonely Planet’s traditional core audience and the youthful skew of the survey partners, it is encouraging that 21% of respondents are aged 35+, demonstrating Lonely Planet’s growing popularity within an older age group.

## Age Groups – Global



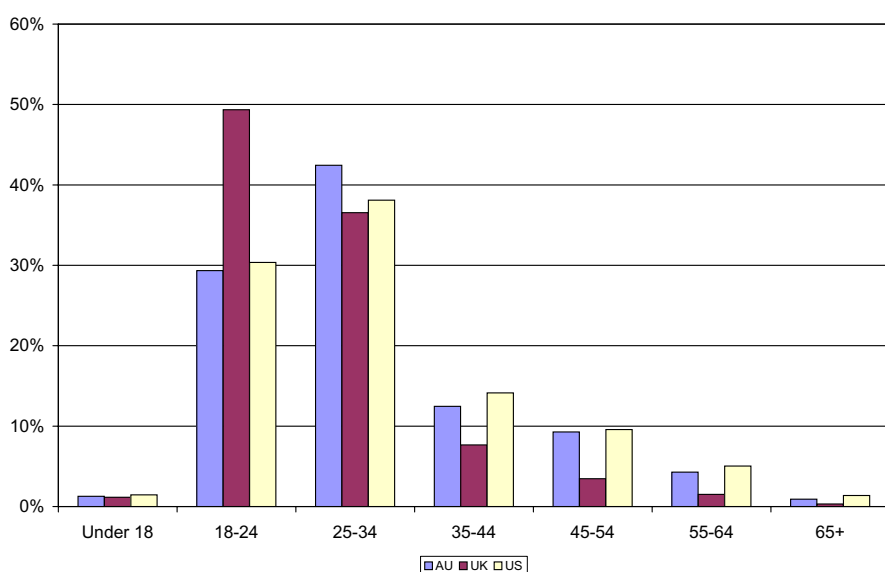
## Regional

On a regional level, the 25–34 group was the largest for both Australia and the US. This is in contrast to the UK, where almost 50% of respondents were in the 18–24 age group.

- There are a number of possible reasons for the younger majority in the UK: the popularity of gap-year travel in the UK; the youth orientation of the UK partners; the strength of the British pound; and the earlier introduction to travel of UK residents given their close proximity to Europe.

Otherwise the trends are more or less consistent across the three regions, which supports the idea that in spite of the geographical differences, the relationship between age and travel is very similar.

## Age Groups by Region

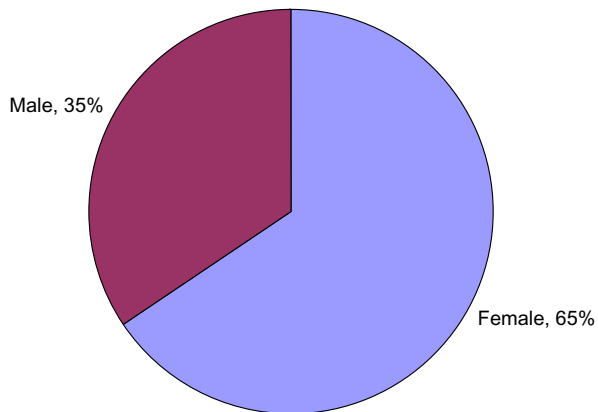




# Gender

The ratio of female to male respondents was 65% to 35%. This does not necessarily suggest females are more likely to travel, but rather suggests females are more likely to offer an opinion online. This is consistent with past research experience as well as Lonely Planet Thorn Tree (online traveller forum) users.

## Gender – Global



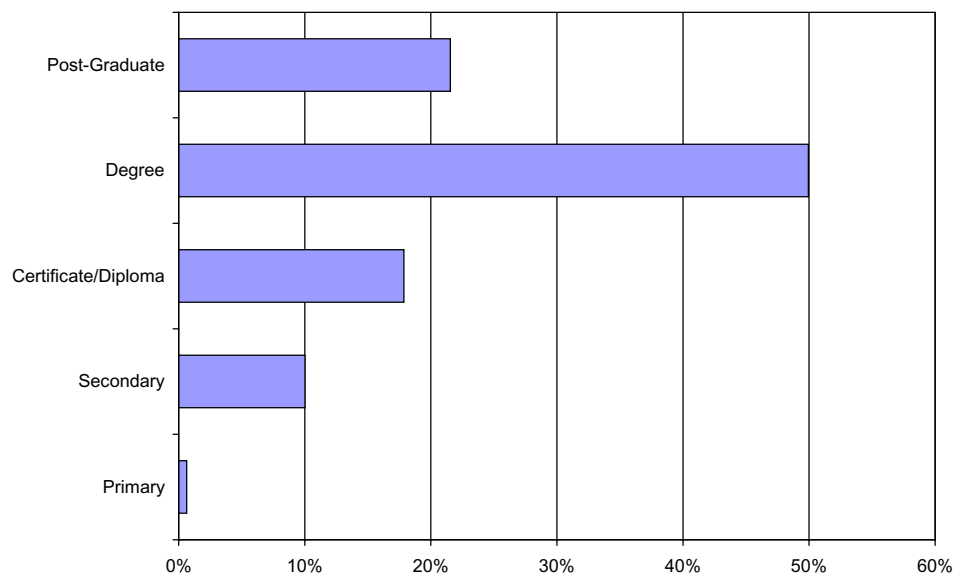
## Points of Interest

- The ratio of female to male respondents was much higher in the younger age groups. In the 18–24 group, the ratio of females to males was 72% to 28%. This relationship gradually evened out as the age of respondents increased. For example, in the 55–64 group, the ratio of females to males was 56% to 44%.
- On a regional level, the ratio of female to male respondents was consistent with the global results. Australia and the UK had the highest percentage of females (72% and 69%) whilst the US was identical to the global average.

# Education

Education appears to be a common element of the independent travelling community, with 72% having a degree or higher. This strongly suggests there is a relationship between education and travel. This could be due in part to the similarities in student and travel lifestyles. With travel increasingly seen as a key component of the whole education process, eg the gap year, this result is not surprising.

## Education – Global



## Points of Interest

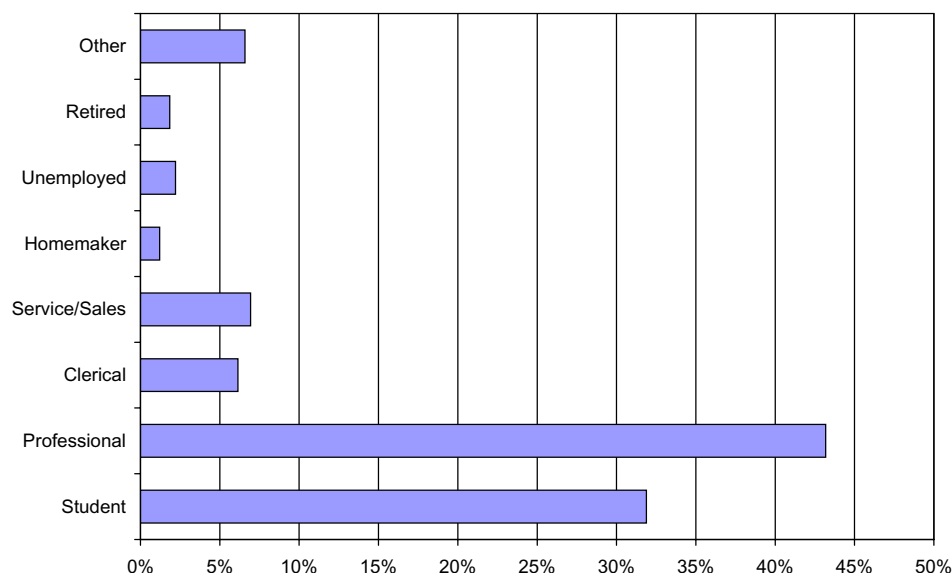
- Postgraduate study is surprisingly high, with 22% of respondents having this qualification. One explanation might be the desire of independent travellers to constantly be learning and experiencing something new and mentally challenging.
- Interestingly, the high level of education is consistent with previous Lonely Planet studies. In the 30th Anniversary survey, 75% of respondents stated they were tertiary qualified. This high rate was consistent across all regions.
- Independent travellers from Asia are increasingly becoming an interesting trend to monitor. Culturally, education has been an important component of their lifestyle, however, in countries such as Japan, youths are now looking for active lifestyle pursuits to help broaden their educational experience. As society changes, combining travel and study will increase significantly.

**Hypothesis:** Could it be that the link between travel and education comes down to the simple fact that both experiences offer an interesting and challenging means to broaden the mind, enrich life experience and promote personal development?

# Occupation

The most popular response to the question of occupation was Professional, which accounted for 43% of responses. The findings on respondent occupation correlate somewhat with the findings in education, where 72% of respondents were degree qualified or higher. This suggests that students and professionals view travel as an important component of their development.

## Occupation – Global



The overall response to the question of occupation was consistent with Lonely Planet's 30th Anniversary Birthday Survey and suggests that travellers are well educated and after completing their studies, tend to go into professional jobs.

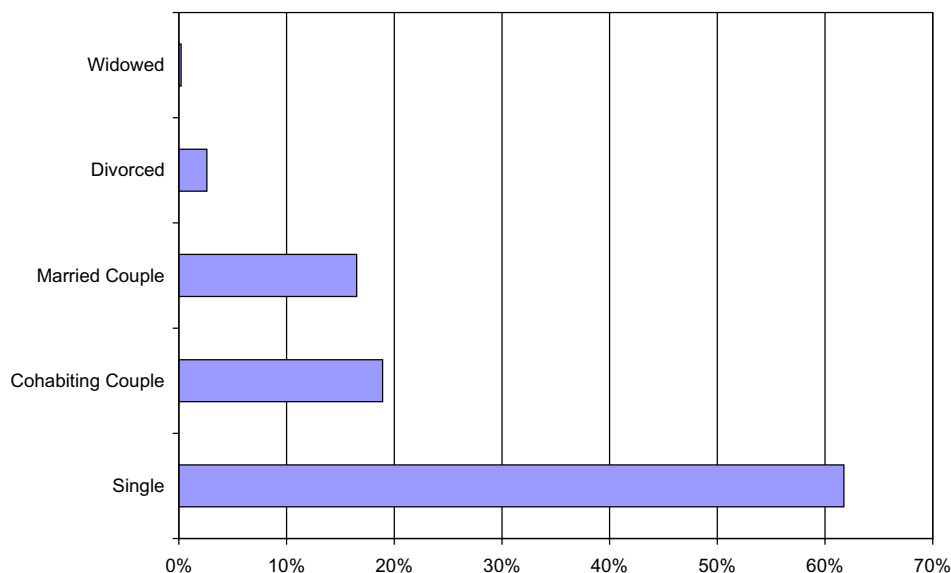
## Points of Interest

- On a regional level, the combined percentages of professional and student are similar across the three regions: Australia (68%), the UK (74%) and the US (75%).
- Where it does get interesting is the proportion of students is considerably higher in the UK (34%) compared to Australia (18%). The US falls in between with 27% of respondents being students. Clearly the gap year phenomenon in the UK is an influential factor.

# Marital Status

Overwhelmingly, respondents were single, with 61% choosing this option. This is not surprising given the younger age of respondents and is consistent with past Lonely Planet surveys. Couples, either married or cohabitating, made up a healthy portion, with 35%. Interestingly, divorcees registered only 3%.

## Marital Status – Global



## Points of Interest

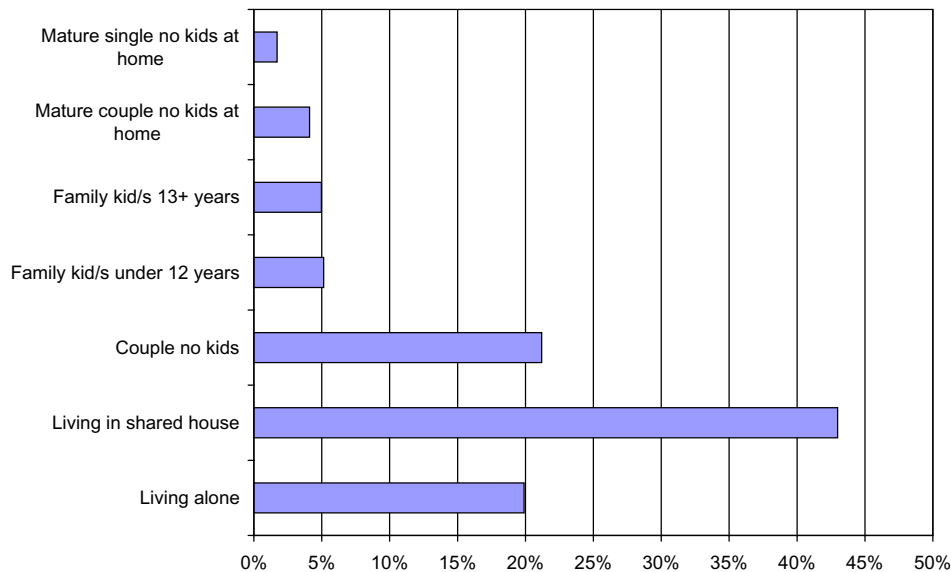
- Within the 18–24 group, single was overwhelmingly the most popular status, at 82%. Cohabiting/married couples made up the remaining 18%.
- The 25–34 group demonstrated similar characteristics to the 18–24s, with singles being the dominant group. However, the gap closed considerably between singles and cohabitating/married couples, with a ratio of 58% to 41%.
- Results were perhaps a little more surprising in the 35–44 group. While cohabitating/married couples registered the highest response, with 53%, singles were still quite a considerable group with 40%. This may well be a sign of the times.
- Of all the groups, cohabitating/married couples rated the highest in the 45–54 bracket, with 62%. Singles registered 24% of the vote, but combined with divorcees the group represented 37%.



# Household

The most popular living situation among respondents was in a shared house (43%). This was followed by a couple with no children (21%) and living alone (20%). Only 10% of respondents had children.

## Household – Global



## Points of Interest

- Of respondents aged 35+, 11% lived alone.
- Only 1% of respondents aged 25 to 34 years had children.

It's clear that younger travellers are generally single, live in a shared house and are either students or in the early stages of a professional career.

*Favourites*  
3

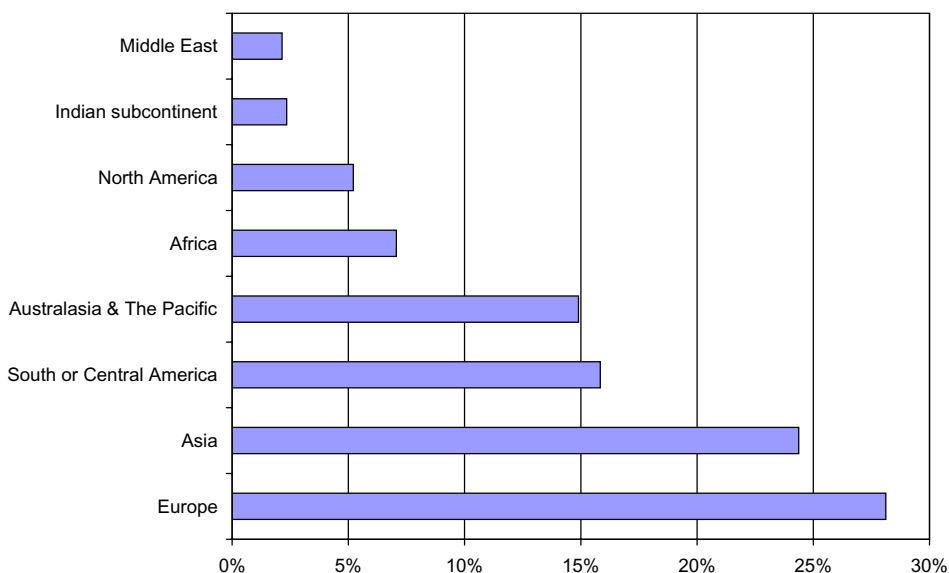


# Favourite Regions

## Global

The most popular region in the world to explore was Europe, accounting for 28% of responses. This was closely followed by Asia at 24%. The Middle East and Indian Subcontinent ranked lowly, with each attracting only 2% of respondents, which is surprising given the recent WTO figures suggesting growth in both these regions. Of growing interest to travellers was South and Central America, coming in third with 16%.

## Favourite Regions – Global



## Points of Interest

- South and Central America was clearly the growth region for travellers; compared to the Lonely Planet 30th Anniversary study, it again grew in popularity. A possible explanation for this is the common desire of travellers to increase the level of challenge as they gain experience and confidence. Also, more North Americans are travelling to this region, suggesting the current trend of intraregional travel.
- Australasia and the Pacific grew in popularity by 4% since the Lonely Planet 30th Anniversary survey and remains extremely popular for long-haul travel. Both Australia and New Zealand featured highly on the 'countries most wanting to visit' list, confirming this trend.
- Europe was the number one choice, with Asia being the second choice for all but the 35–44 age group. This group nominated Asia as its favourite region, with 27%, and Europe a close second with 26%.
- Research suggests that South and Central America is largely considered an intrepid destination and is generally more popular with independent travellers who fall between the ages of 25 and 44 and have some travel experience.

**Watch out for the continual growth in South and Central American tourism. We predict this region will become the next 'hot' travel area in the world.**

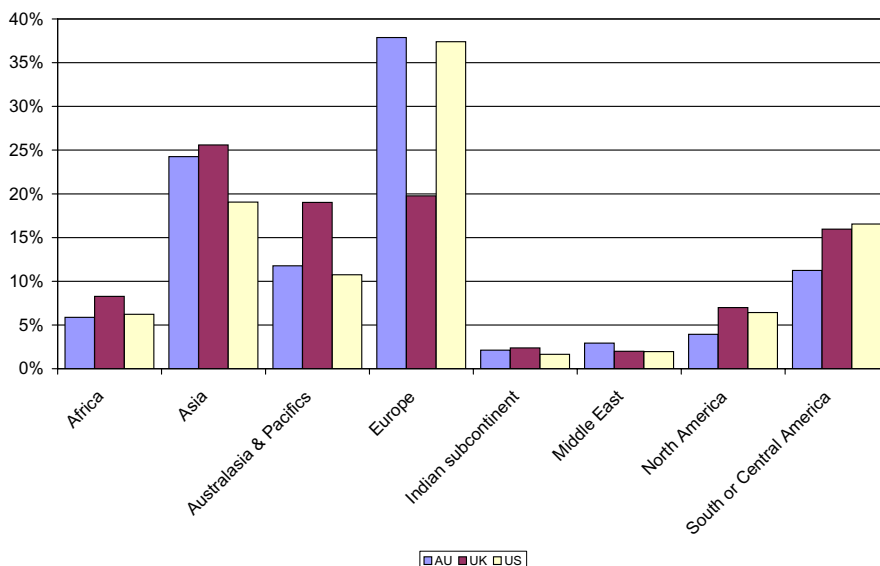


# Favourite Regions (cont)

## Regional Differences

Europe remains the favourite region for Australian and US travellers, with Asia being the second most popular choice. Travellers from the UK voted in an opposing manner, nominating Asia as their first choice followed by Europe. South and Central America was voted third choice by US travellers, whereas UK and Australian travellers selected Australia and the Pacific.

## Favourite Regions for Australia, UK and US respondents



## Points of Interest

- The preferred region for travellers from the UK and Australia involves long-haul flights. This suggests they are serious about travel and are prepared to make greater time and financial investments.
- South and Central America is more popular with UK and US travellers. One explanation for this could be the significant cost Australians incur in accessing the region.

**Hypothesis:** While the WTO suggests that intraregional travel is performing strongly, this survey suggests that long-haul travel destinations appear to be more favoured by respondents. For example, British and European respondents rated Asia as their favourite region, while Australian and US respondents rated Europe as their favourite region.

# Favourite Countries

## Global

Australia was voted the most popular country in the world by 7.1% of respondents. It was closely followed by Italy on 6.8% and Thailand on 6%. New Zealand and France also made it into the top five. It is interesting to note that India was the only truly intrepid destination to make it into the top 10.

## Top 20 Favourite Countries – Global

Rank	Favourite Country (Top 20)	
1	Australia	7.1%
2	Italy	6.8%
3	Thailand	6.0%
4	New Zealand	4.0%
5	France	3.9%
6	Spain	3.9%
7	United States	3.7%
8	United Kingdom	3.0%
9	India	2.9%
10	Canada	2.6%
11	Chile	2.4%
12	Greece	2.2%
13	Mexico	2.1%
14	Brazil	1.8%
15	Vietnam	1.8%
16	Nepal	1.7%
17	Japan	1.6%
18	Indonesia	1.6%
19	Turkey	1.6%
20	Ireland	1.5%

## Points of Interest

- While Africa ranked fifth as the favourite region, it's worth noting that no African countries made it to the top 20 favourite countries list. The highest-ranking African country was South Africa, sitting in 23rd position.
- Although China is a growing travel destination, it too did not make its way into the top 20; in fact, it was ranked 97th out of a possible 208. This is in stark contrast to the 30th Anniversary survey, which featured China in the top 10.
- Another country that has dropped in ranking is Nepal. In the 30th Anniversary survey it was ranked seventh. This time round it has slipped back to 16th. A possible explanation for this decline may be the increasingly unstable political climate. Certainly the WTO has reported a decline in arrivals to Nepal since 2001.

# Favourite Countries (cont)

## Regional

Italy and Thailand were the only two countries to feature in all regional top fives. Those two countries, along with Australia, France, New Zealand, and Spain, made each region's top 10.

### Top 10 Favourite Countries for Australia, UK and US respondents

Rank	Australia		United Kingdom		United States	
1	Australia	9.4%	Australia	8.5%	Italy	8.7%
2	Italy	8.3%	Thailand	6.1%	Spain	4.5%
3	Thailand	5.4%	Italy	5.7%	United Kingdom	4.3%
4	France	5.1%	United States	5.3%	Thailand	4.3%
5	United Kingdom	3.7%	New Zealand	5.2%	United States	4.3%
6	New Zealand	3.5%	India	3.4%	Australia	4.1%
7	Vietnam	3.2%	Spain	2.8%	France	4.0%
8	Canada	3.1%	Canada	2.7%	Mexico	3.9%
9	Spain	3.1%	Greece	2.5%	New Zealand	3.6%
10	Chile	2.9%	France	2.5%	Costa Rica	2.6%

## Points of Interest

- Australians are a surprisingly patriotic lot voting Australia as their favourite place in the world, whereas respondents from the UK ranked their own country in 21st place.
- Interestingly, Chile is the most popular country in South America and appears to be emerging as a hot destination.
- Travellers from the UK spread their responses across the highest number of different countries (154 in total) which suggests they are more widely travelled than their counterparts in Australia and the US.
- India polled highly with the heavily travelling 25–34 age group. This age group also rated other intrepid countries such as Chile, Vietnam, Cambodia and Laos high on their list, suggesting that once they have visited the more traditional destinations, they move onto more challenging countries.

Perhaps surprisingly, the top 10 favourite countries remained largely unchanged regardless of age group. For example, the 18-24s and the 45-54s voted the same 8 countries in their top 10. This suggests that in spite of trends and different travelling styles, traditional core destinations still remain as popular favourites with most independent travellers.

# Next Destinations

## Global

Respondents voted Australia as the most popular 'next destination', with 18%. This is a little surprising given that Australia also featured as the favourite country visited. Interestingly, Chile and Brazil polled very highly, finishing second and third, with 13% and 12% respectively. Peru was also a popular choice, coming fifth behind India. This supports the hypothesis that South America is definitely an increasingly hot destination.

## Next Destinations – Global

Rank	Next Destination (Top 20)	
1	Australia	7%
2	Chile	5%
3	Brazil	5%
4	New Zealand	5%
5	India	4%
6	Peru	4%
7	Thailand	3%
8	Italy	3%
9	Japan	2%
10	Vietnam	2%
11	Argentina	2%
12	Cuba	2%
13	Egypt	2%
14	United States	2%
15	South Africa	2%
16	Canada	2%
17	Mexico	2%
18	Nepal	2%
19	Spain	1%
20	France	1%

## Points of Interest

- South America appears to be gaining in popularity, with Chile, Brazil and Peru all making it to the top 10. This is likely due to a number of factors: word of mouth, an increase in traveller confidence and the desire to get off the beaten track.
- Along with Australia, Thailand and Italy also featured in both the Favourite and Next Destination categories. Vietnam is clearly gaining in popularity, as is India.
- The classic destinations still poll well. Australia, India, New Zealand, Thailand, Italy etc typically appear high on the list of favourite/desirable destinations.
- Respondents aged 35+ still like to maintain their intrepidness; however, their 'exotic' destinations are more commonly places like Antarctica.

Interestingly, the same traditional destinations featured in the Lonely Planet 30th Anniversary Birthday survey which suggests that these countries are largely considered 'must see' destinations and will feature on the majority of travellers' lists of countries to visit.

# Next Destinations (cont)

## Regional

Australia remains at the top of the next-destination list for UK and US respondents. Australians nominated Peru as the first choice.

- Interestingly, four South and Central American countries featured in the Australian and the UK top 10: Peru, Chile, Brazil and Cuba. The US featured three: Chile, Brazil and Argentina.
- Canada featured in both the Australian and the UK top 10.
- US respondents ranked Greece at seventh place, which is likely to be heavily influenced by the Athens Olympics.
- Italy, Spain and Greece were the only European destinations to feature in the regional top 10s for Australia, the UK and the US.

## Next Destination – Regional

Rank	Australia		United Kingdom		United States	
1	Peru	5.4%	Australia	9.1%	Australia	6.7%
2	Chile	5.0%	Brazil	6.3%	India	5.6%
3	Italy	4.5%	Chile	6.2%	Italy	5.5%
4	Brazil	4.3%	New Zealand	6.1%	Chile	5.0%
5	Canada	3.9%	India	5.2%	New Zealand	4.5%
6	India	3.8%	Peru	4.9%	Thailand	3.9%
7	Egypt	3.4%	Thailand	3.6%	Greece	2.6%
8	Vietnam	3.2%	Cuba	3.1%	Brazil	2.6%
9	Spain	2.9%	Japan	2.8%	Vietnam	2.3%
10	Cuba	2.9%	Canada	2.7%	Argentina	2.3%

## Points of Interest

- The 'hottest' destination for each age segment produced surprising results. All age groups, with the exception of 45-54s, voted Australia as their number one next destination. The 45-54s voted Chile as their first choice.
- Peru and India featured in all top 10s regardless of age group.
- Looking further into the list of preferred next destinations, Vietnam is popular with the +35s whilst Japan is a top 10 destination for the less than 35s.
- Argentina featured in the top 10 for 25s to 44s and Antarctica was a popular choice for the 45-54s.
- It is worth noting that the mix of traditional destinations versus intrepid destinations which was 50:50 remained consistent in all age groups.

**Hypothesis: Travellers tend to visit easier and safer destinations first. As they become more experienced and confident, they start to challenge themselves by seeking out more intrepid destinations.**



# Behaviour 4



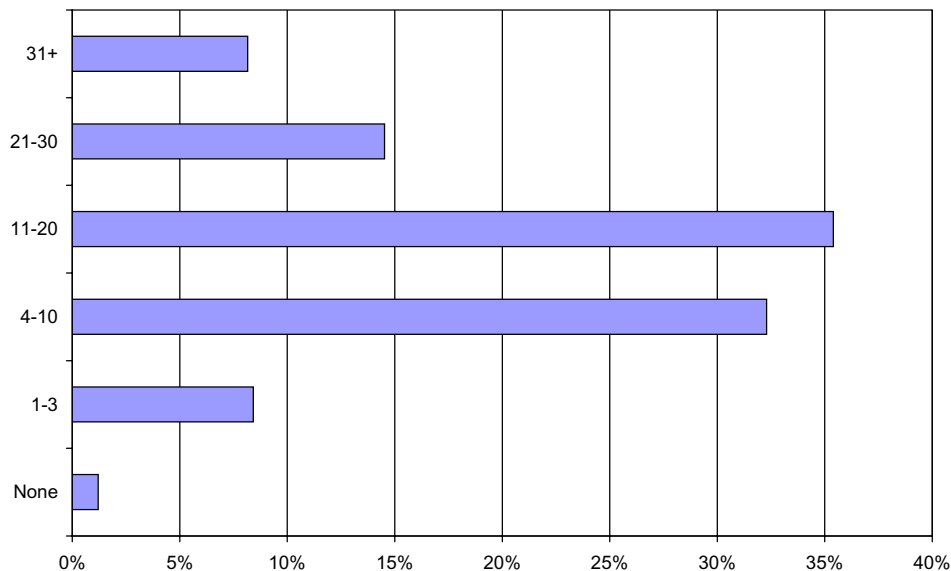
**GO  
SLOW**

# Number of Countries Visited

## Global

Respondents are well travelled, with 59% having visited 11 or more countries. The most popular selection, with 36%, was 11 to 20 countries. Only 1% of respondents had never been outside their own country.

### Number of Countries Visited – Global



## Points of Interest

- The most popular range for the 18–24 age group was 4 to 10 countries (40%). This was closely followed by 11 to 20 countries (36%).
- Interestingly, in the UK, 42% of 18–24s had visited between 11 and 20 countries, whereas respondents from the same age group in Australia and the US had travelled to fewer countries. Along with the UK's close proximity to Europe, this is also probably due to the popularity of the gap year.
- Encouragingly, with respondents telling us they are either travelling the same or more than ever, these numbers should move higher in future surveys.
- As expected, the British have travelled to more countries than respondents from any other region. This is likely the result of the close proximity of the UK to continental Europe.

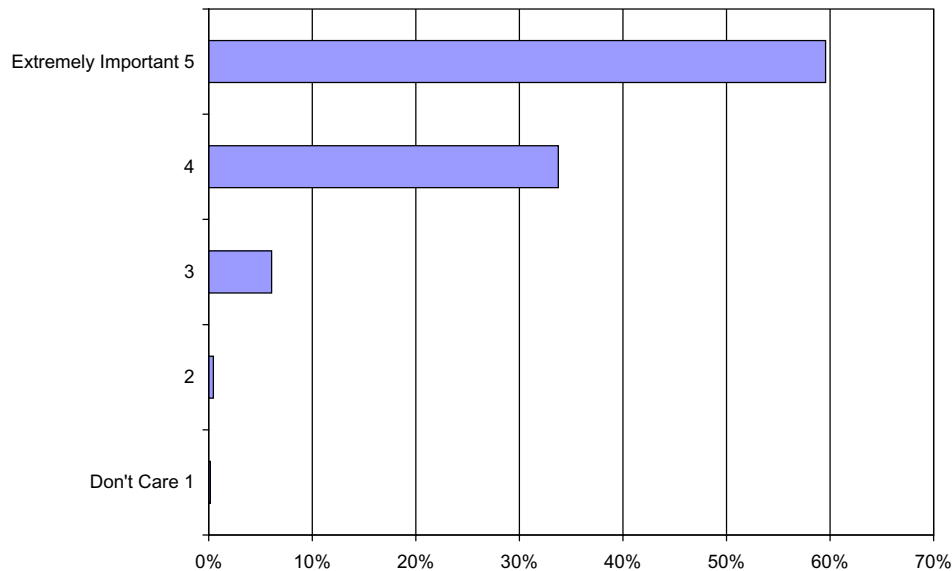
Interestingly, with only approximately 19% of US citizens owning a passport, 48% of US respondents have travelled to more than 10 countries.

# Importance of Travel

## Global

Not surprisingly, over 93% of respondents rated travel as being either important or extremely important. While this can largely be explained by the fact that the survey was distributed on travel websites, nevertheless it is very encouraging to know that travellers view travel with such importance. Of those polled, 60% rated travel as extremely important.

### Importance of Travel – Global



### Points of Interest

- Obviously the high importance of travel is skewed somewhat due to the use of travel websites as the distribution method. However, it can be said that travel is increasingly becoming a key lifestyle pursuit. Travel is definitely more mainstream and accessible now than in previous years and is frequently considered to be an important component of the education process.
- Not surprisingly, a higher proportion of the less than 35s considered travel to be extremely important than the over 35 age groups. Although the differences were minimal, it is likely that the younger age groups have less financial and family commitments and therefore place greater importance on travel.

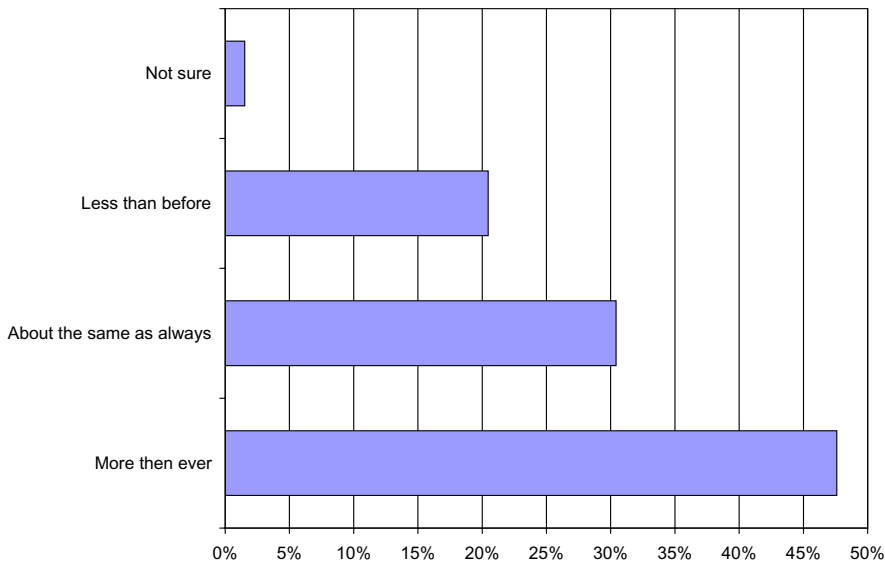


# Frequency of Travel

## Global

Signs are really positive, with 48% of respondents saying they are travelling more than ever. This is consistent with other research data such as the WTO, which recorded tourist arrivals in 2004 at an all-time record high, corresponding to an increase of 10%. Clearly consumer confidence surrounding travel has returned after three turbulent years.

### Frequency of Travel – Global



### Points of Interest

- All age groups, with the exception of 35–44, are predominantly travelling more than ever. The 35–44 group voted evenly, with 34% for travelling more than ever and about the same as always – this is a very encouraging result.
- Of all the age groups, 18–24 had the most respondents select more than ever (55%). This is not surprising as they are more likely than the other groups to be entering the independent travel cycle for the first time.
- The 25–34 group is also predominantly travelling more than ever, with 45% selecting this option.
- Overall, 68% of respondents aged between 35 and 44 are either travelling the same or more than ever. Given this age group's likelihood to be more affected by family commitments and time constraints, this is a very encouraging result.
- From the age of 45 upwards, respondents indicated that they were increasingly travelling, right up to the age of 64, where the growth rate appears to plateau.
- A higher proportion of respondents from the UK (54%) and Asia (54%) said they were travelling more than ever. The response from Australia, Europe and the US was also strong, however, it was less than the UK and Asia with an average of 45%.
- It's worth noting that those respondents who said travel was extremely important are likely to be travelling more than ever.

**Hypothesis: Respondents from Asia and the UK are leading the way with travel frequency, with 54% from both these countries indicating they are travelling more than ever.**

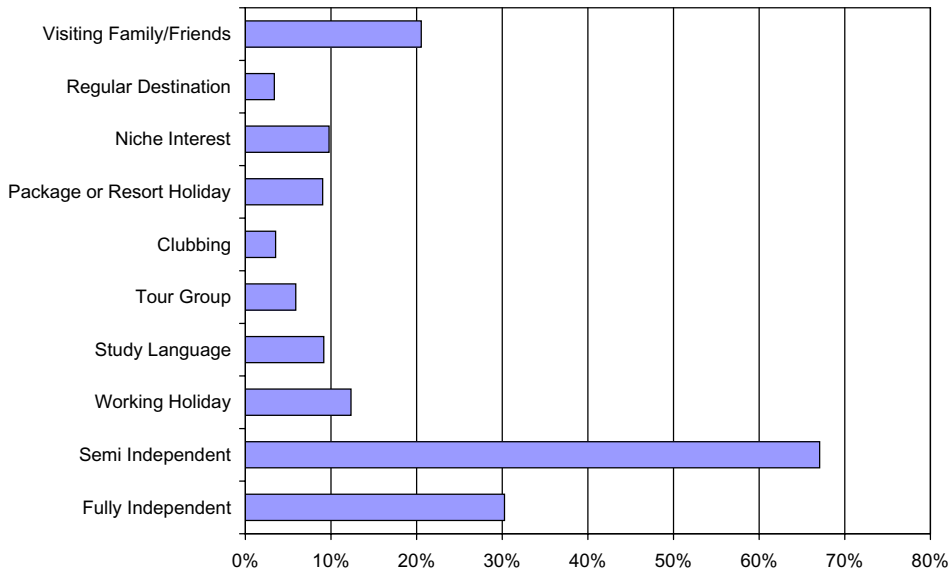


# Travelling Style

## Global

Overwhelmingly, semi-independent (having booked some of their on-ground component before departure) is the most popular style of travelling, with 67% of responses. This is to be expected given that the target audience of the survey was independent travellers.

### Travelling Style – Global\*



*\*Note: Respondents selected more than one option.*

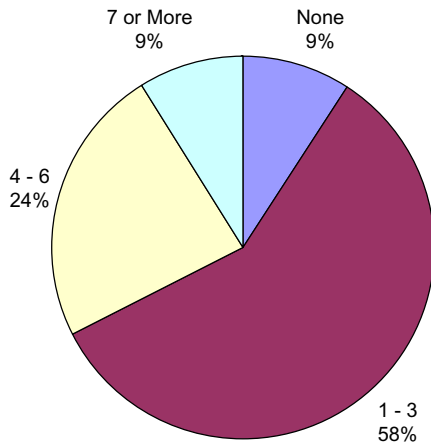
### Points of Interest

- The response to Visiting Family/Friends is largely typical. Generally this style of travel usually accounts for between 20% and 30% of total tourism.
- Package holiday and tour group travel polled lowly, which is largely a factor of the characteristics of respondents.
- Both working holiday and studying language polled well, considering they are niche activities. A lot of focus was given to both these travelling styles at the 2004 World Student & Youth Travel Conference in Madrid. Both these styles appear to be growing in popularity.
- Not surprisingly, Australians are the most likely region to take a working holiday whilst Americans are the least likely.
- Clubbing appears to be a pursuit of the younger traveller with the 18-24s polling 6% compared to 25-34s polling only 2%. On a regional basis, Europe and the US polled the highest.

# Number of Short Breaks

The most popular response to the question of how many short breaks are taken per annum was between one and three, with 58% of the vote. This is consistent with other research in that the typical independent traveller would take between one and three short breaks and one long break in an average year.

## Number of Short Breaks



Interestingly, 24% of respondents selected between four and six breaks per year, which is more consistent behaviour of the weekend-getaway traveller.

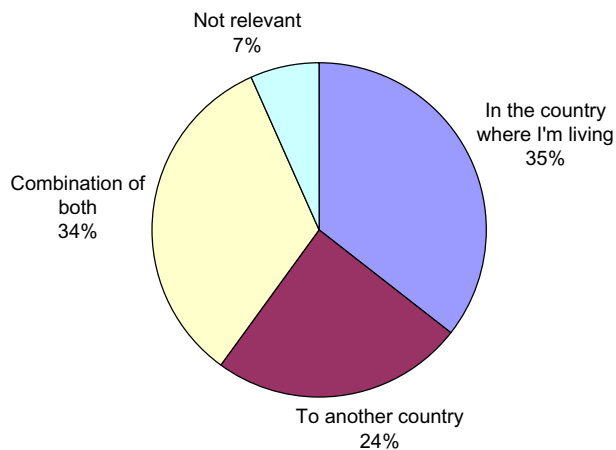
## Points of Interest

- On a regional level, the most popular range of between one and three short breaks per year remained consistent with the global result. The UK was slightly higher than Australia and the US, with 63% of respondents choosing this option.
- What is perhaps a little surprising is that the US polled the highest response in the four-or-more category, with 39%. Compared to Australia (27%) and the UK (26%), this is a sizable difference.
- Respondents from the 25-34 age group are more likely to take a higher number of short breaks than any other age group. This is likely due to the fact that they predominantly employed in a professional capacity and are less likely to have children.

# Short-Break Destinations

'In the country where I'm living' was the favourite destination for a short break, but only just. While 35% of respondents selected this option, 34% selected a combination of their home country and another country. Not surprisingly, the answers to this question varied considerably depending on the geographical location of the respondent's home country.

## Short Break Destinations – Global



## Regional

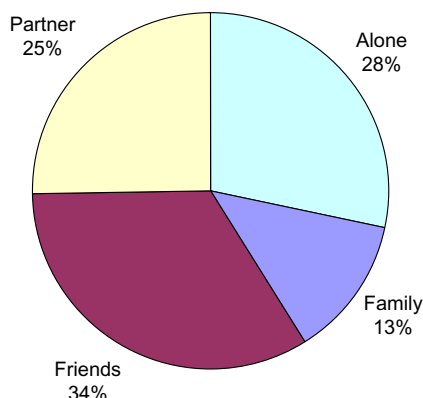
- In contrast to the other regions, UK respondents prefer to take their short breaks in another country, with 40% selecting this option. A further 39% enjoy a combination of their home country and another country, while only 21% take short breaks in their home country.
- The US differed considerably from the UK, preferring to take their short breaks in the US. However, 31% do like to mix it up, taking short breaks at home and in another country.
- Not surprising, 70% of Australians take short breaks in Australia and 16% take their breaks in another country.

# Companions

Nothing new was revealed in the choice of travel companions, with results following a typical age-related pattern. The younger 18–24s prefer to travel with friends, while the more mature mid-lifers prefer travelling with their partners and/or families.

Overall, the favourite choice of travel companion was friends, with 34% of the response. Travelling alone (28%) followed, while 25% of respondents selected partner. Surprisingly, this is in contrast to the Lonely Planet 30th Anniversary survey, where respondents selected partner as the most popular travel companion.

## Companions – Global



## Points of Interest

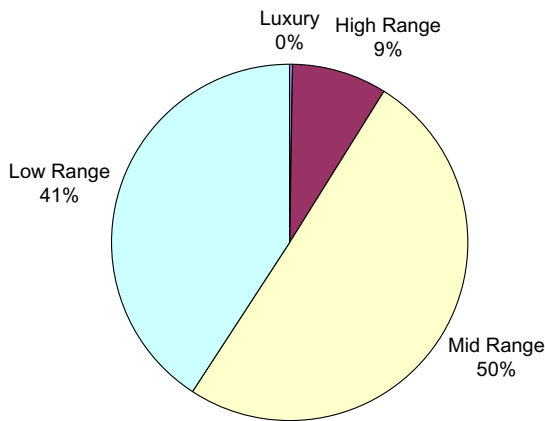
- This result is somewhat skewed by the large number of 18–24-year-old respondents who voted travelling with friends as the overwhelmingly popular choice (47%).
- The slightly older group of 25–34-year-olds voted evenly between travelling alone, with friends and with partner, each registering 32% of the vote.
- Not surprisingly, of the midlife respondents 41% prefer to travel with their partners and 37% travel with their family. Only 22% travel with friends.



# Budget

The travel budget for respondents is mid-range/low range, which is consistent with previous Lonely Planet surveys. When considering the age range and profile of respondents, it's not surprising that very few were high-end/luxury travellers. Most of the high-end travellers came from the growing short-break market, where travellers are more likely to splurge given it's a shorter trip.

## Budget – Global



When analysing budget compared with age groups, the younger respondents tend to be at the lower range end of the scale, whereas from the age of 25 years+ there is a noticeable migration into mid-range expenditure. This is not surprising and has been supported by previous studies (for example ISTC's New Horizons in Independent Youth and Student Travel report) – it's due to many younger consumers having limited available funds.

## Points of Interest

- There is a direct relationship between age and budget. The 18–24 age group were more likely to be low-range travellers, 25–34 mid-/low range and 35+ firmly mid-range.
- The breakdown of travel budget expenditure provided interesting results: -

Budget Component	Amount
Transport	35%
Accommodation	26%
Food	20%
Other Activities	19%

- What was a little surprising is that the proportion of expenditure remained largely unchanged regardless of age breakdown. Whilst there was a slight increase in the Transport and Accommodation components which was reflected by a slight decrease in Other Activities in the older age groups, these amounts were minimal e.g. 1 or 2%. This suggests that any increase or decrease in the travel budget is spread across all areas rather than devoted to one or two specific components.
- On a regional level, respondents from the United States under the age of 35 spend slightly more on transport and less on accommodation and other activities than Australians and Britains.
- Food was the one budget component that was consistently the same regardless of age group or region, maintaining 19 to 20% of budget.

**Hypothesis: The high degree of mid-range respondents demonstrates the growing Lonely Planet audience. Once used predominantly by budget travellers, the brand has grown to be relevant to a broader group.**

# Motivators

Exploring other cultures was clearly the most important motivation for travelling, with 70% rating it as very important. A sense of adventure is also considered important, with 55% saying it was very important. Overall, adventure and independence shine through as key motivators for respondents.

## Travel Motivations – Global

Travel Motivations	Not Important 1	2	3	4	Very Important 5
Making new friends with other travellers	7%	10%	33%	32%	18%
Contributing to places visited	4%	14%	41%	29%	11%
Interacting with locals	1%	3%	15%	39%	43%
Relaxing or escaping life for a while	1%	4%	13%	32%	49%
Finding myself / personal growth	3%	7%	19%	33%	39%
Exploring non-tourist areas	1%	3%	14%	38%	44%
Visiting friends and family	11%	19%	32%	23%	14%
Challenging my abilities	3%	8%	25%	37%	27%
Exploring other cultures	1%	1%	4%	25%	70%
Sense of adventure	1%	2%	10%	32%	55%
Attend events (sports, music etc)	9%	19%	34%	26%	12%

## Points of Interest

- Perhaps surprisingly, overall 18% of respondents considered making new friends with other travellers very important while 43% considered interacting with locals to be very important. While the 18–24 age group rated making new friends higher (24%), this is lower than we would have expected. It's encouraging to see that travellers are trying to immerse themselves into local culture.
- Not surprisingly, exploring non-tourist areas remains high on the list of what's important. This is consistent with the 'Lonely Planet' traveller ethos, as they like to get off the beaten track and hunt for the unique experiences.
- Although attending events (sports, music etc) is still niche, this has grown over past surveys, which suggests this is an emerging travel motive. Again, this is a popular motivation with the younger demographic.
- Using travel to escape or relax as a motivation was higher among respondents aged 35+. When examined along with the length of trips taken, it became evident that travellers that take a shorter break are much more likely to have relaxation as a key motivator.
- 'Contributing to places I visit' was more popular among respondents aged 18 to 24 years. This is supported by the growing trend of youth volunteering and working/studying abroad.

**Hypothesis: Interestingly, visiting friends and family did not rate highly. Typically, this is a large travelling sector; however, whether it's a driver of travel is debatable.**

# Barriers

As expected, lack of money was the greatest travel barrier, followed by limited free time. Encouragingly, these barriers do not seem to be dampening travel demand, as 50% of respondents said they are travelling more now than ever before. The money and time issue is likely to affect the style and length of travel rather than stop consumers travelling at all. This needs to be explored further; a hypothesis is that the above combination has led to the increase in short breaks and consumers doing fewer long trips.

## Travel Barriers – Global

Travel Barriers	Not a Barrier 1	2	3	4	Major Barrier 5
Interrupting my career	22%	16%	23%	23%	15%
Family commitments	41%	24%	19%	11%	5%
Financial commitments	22%	16%	24%	20%	18%
Not enough money	4%	7%	15%	24%	49%
Not enough free time	12%	14%	25%	27%	23%

## Points of Interest

- Interrupting my career was very high for 18–24-year-old respondents (36%), which is surprising. Past Lonely Planet research hasn't uncovered this as a trend; it will need to be monitored in future studies.
- The most pronounced regional difference was the importance that the Asian respondents placed on career, with 42% believing it was a barrier to travel. Otherwise, there was general consistency.
- Interestingly, family commitments did not feature highly as a travel barrier. Again this reflects the younger age groups of the respondents and older travellers' tendency to take shorter breaks.

# Travel Effects

Travel appears to impact strongly on those who embark on adventures as a youth or backpacker. These findings suggest that travel at an early adult age has a considerable influence on people's lives.

## Travel Effects – Global

Impact of Travel	No Effect 1	2	3	4	Major Effect 5
Responsible travel habits	2%	2%	17%	40%	39%
Developing positive personal values and ethics	2%	2%	14%	38%	44%
Your respect for other cultures	1%	1%	6%	27%	65%
Your interest in issues of social justice, poverty, world peace	2%	6%	19%	32%	41%
Your overall lifestyle	2%	5%	22%	39%	33%
Your career choice	16%	17%	26%	22%	20%
Tendency to travel independently	2%	2%	13%	32%	51%

Respondents rated respect for other cultures as being the issue that affected them the most. A staggering 92% claimed that travel was a strong influence in developing their respect for other cultures.

## Points of Interest

- Apart from respondents aged 18–24 feeling that travel had a greater effect on their lifestyle, there were very little differences between age groups.
- Travelling independently was high for all respondents in all major markets. Given the nature of this survey, that is not a surprising finding.
- At a regional level, travel has had the greatest impact on US respondents. Compared to all other regions, the US respondents rated higher on each of the questions.

Evidence suggests that travel helps develop and define a social conscience. It has a positive effect on personal values and attitudes, making consumers worldlier.



Information  
5



# pre-travel information

The Internet is clearly the most popular source of information, with 91% of respondents saying they frequently use it as a pre-travel information source. Other popular selections were guidebooks (68%) and word of mouth (47%). After these three sources, responses dropped off dramatically.

## Pre-Travel Information – Global

Pre-Travel Information	Never	Occasionally	Frequently
Web	1%	9%	91%
TV travel shows	41%	49%	10%
Guidebooks	4%	27%	68%
Newspapers / magazines	18%	59%	22%
Word of mouth	6%	47%	47%
Travel agents	39%	47%	13%
Tour brochures	39%	45%	17%

## Points of Interest

- Perhaps surprisingly, travel agents, travel brochures and TV shows are only occasionally used as information resources. Newspapers and magazines are more popular sources of information but only marginally.
- Guidebooks were a popular pre-planning tool with respondents aged 25–34 years. This is consistent with past Lonely Planet studies and suggests that as guidebook usage becomes more familiar, the use and purpose of a guidebook increases.
- Interestingly, actually booking a trip with a travel agent has not diminished, whereas their role in pre-planning looks to have declined. The obvious conclusion is the greater use of the internet by travellers for pre-planning; however, consumers still want the security of booking with a ‘real’ person.
- The major difference between age groups is with word of mouth. Of respondents aged 18–24, 53% frequently use word of mouth as a source, whereas only 36% of respondents aged 35+ do the same.

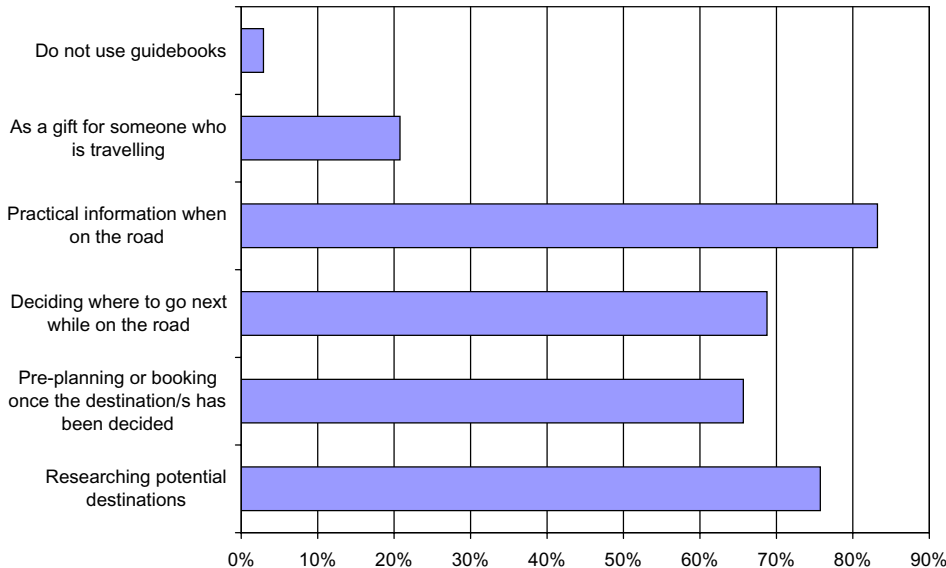
**Hypothesis: Word of mouth and guidebooks have a strong correlation. Travellers trust both sources and often they work hand in hand.**



# Guidebook Purpose

The most common use for travel guidebooks is obtaining practical information while on the road. This is no surprise, with 83% of respondents selecting this purpose. The second most flagged purpose for guidebooks is researching potential destinations, with 76% of respondents saying they use books for this reason. Combined, this suggests that a guidebook is purchased early in the travel-planning cycle and used through until the trip is complete.

## Guidebook Purpose – Global\*



*\*Note: Respondents selected more than one option.*

## Points of Interest

- Interestingly, 69% of respondents use guidebooks to decide where to go next while on the road – this is a typical trait of travellers on a longer trip.
- Also, 21% of respondents purchase guidebooks as a gift for someone who is travelling. This is a high figure and potentially a new segment to investigate further. Future studies should monitor this trend.
- Only 3% said they do not use guidebooks. Although this was a Lonely Planet survey, that number is still low.
- Guidebook usage across the regions was consistent with the global trend, with little or no differences in purpose emerging. Practical information while on the road was the popular choice, closely followed researching potential destinations.

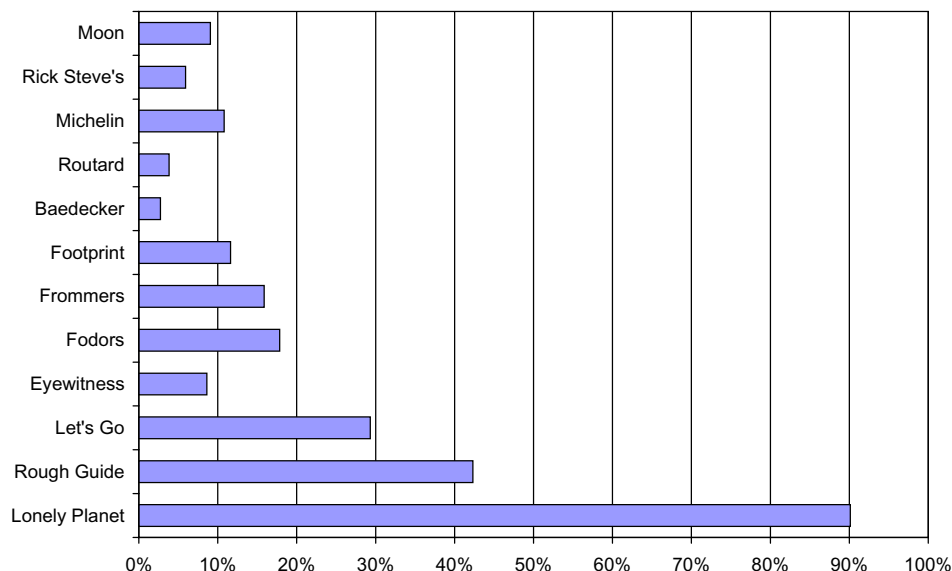
**Guidebooks are the only sources that are used throughout all aspects of the travel cycle. Travellers use guidebooks to help select a destination, to pre-plan their trip and then while on the road.**

# Guidebooks Used

The popular choice was Lonely Planet, with 90% saying they had used a Lonely Planet guidebook. The next most popular guidebooks were Rough Guide (42%), followed by Let's Go (29%). Fodors and Frommers were the other two guidebooks to make up the top five on a global scale.

It should be noted these findings will be skewed in favour of Lonely Planet as the Lonely Planet website was a core distribution vehicle.

## Guidebooks Used – Global\*



\*Note: Respondents selected more than one option.

## Points of Interest

- Again, Lonely Planet was the favourite choice at a regional level, with Australians preferring it slightly more than the other regions. No doubt that has something to do with it being an Australian company.

## Top 5 Guidebooks Used – Regional

Rank	Australia	United Kingdom	United States
1	Lonely Planet	Lonely Planet	Lonely Planet
2	Let's Go	Rough Guide	Fodors
3	Rough Guide	Footprint	Let's Go
4	Frommers	Let's Go	Frommers
5	Fodors	Eyewitness	Rough Guide

- Perhaps surprisingly, Let's Go was the second most used in the Australian region.
- Fodors was the second highest ranking guidebook in the US, closely followed by Let's Go.
- Not surprisingly, Michelin guides were more popular with European travellers than with any other travellers.

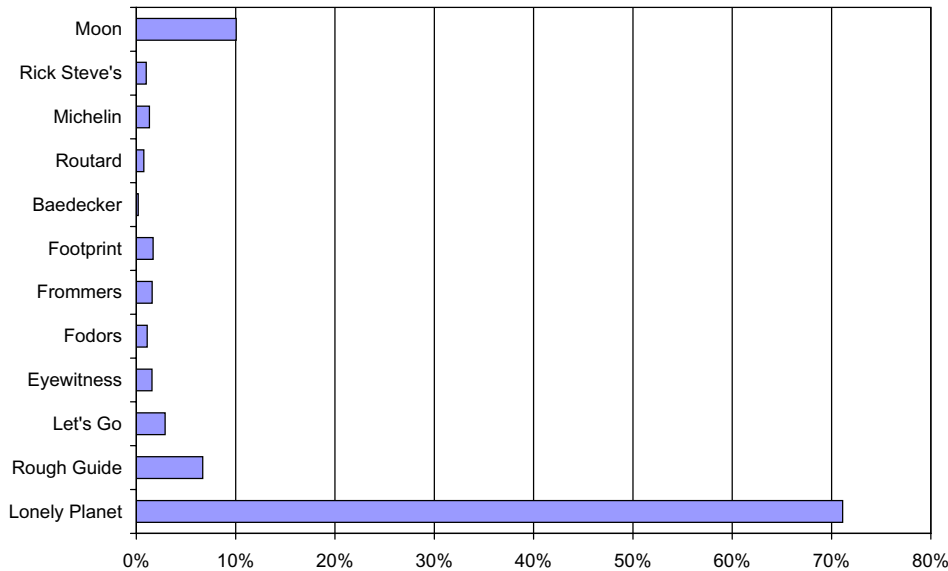


# Next Trip Guidebook

Respondents clearly voted Lonely Planet as the preferred choice of guidebook for their next trip. There was a massive difference between Lonely Planet, with 71%, and its nearest challenger, Moon, with 10% of the response.

Obviously these findings are skewed in favour of Lonely Planet; however, the large margins do suggest that Lonely Planet is clearly favoured by the majority of respondents.

## Next Trip Guidebooks – Global



It is worth noting that Moon was the respondents' second choice of next guidebook. While the percentage may have been low (10%), Moon did rank in front of its established competitors such as Rough Guide, Let's Go and Footprint.

## Next Trip Guidebooks – Regional

Rank	Australia	United Kingdom	United States
1	Lonely Planet 86%	Lonely Planet 67%	Lonely Planet 65%
2	Moon 4%	Rough Guide 17%	Moon 11%
3	Rough Guide 2%	Moon 9%	Frommers 5%
4	Let's Go 2%	Footprint 3%	Let's Go 4%
5	Eyewitness 2%	Eyewitness 2%	Rick Steve's 4%

- On a regional level the trends were consistent with the global snapshot. Again, there was an obvious bias towards Lonely Planet.

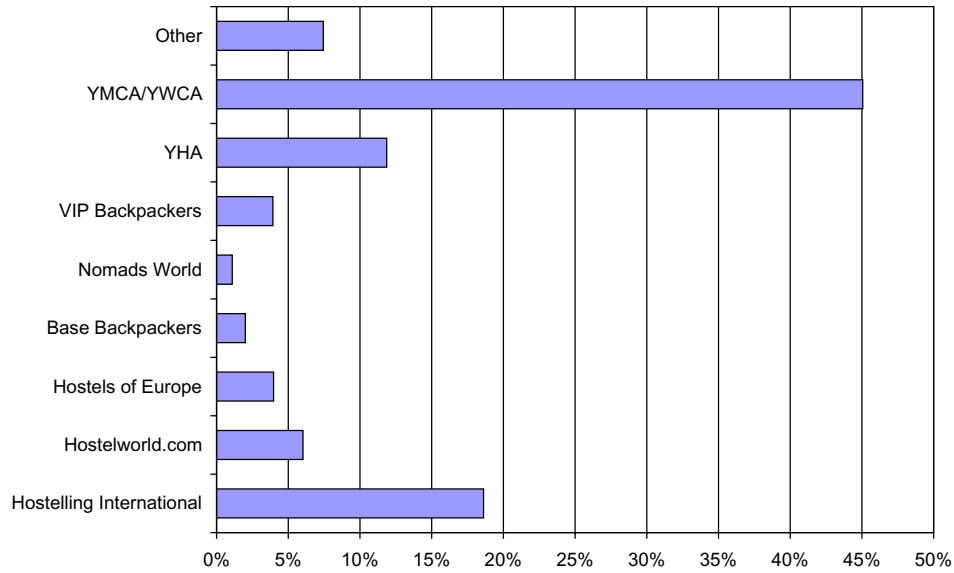
*Arrangements*  
6



# Favourite Hostels

YMCA/YWCA was the favourite hostel, with 45% of respondents selecting this option. Second choice was clearly Hostelling International with 19% of the response, and third was YHA with 12%.

## Favourite Hostels – Global



# Hostel Influences

The most influential factor in determining the preferred choice of hostel was location, with 89% of respondents rating this Important/Very Important. Second was cost, with 79% of respondents rating this as Important/Very Important. An independent quality rating also featured highly, with 59% agreeing this was Important/Very Important.

## Hostel Influences – Global

Hostel Influences	Not Important 1	2	3	4	Very Important 5
Brand Reputation	25%	16%	28%	20%	12%
Cost	3%	3%	15%	34%	45%
Independent Quality Rating	6%	8%	28%	36%	23%
Location	1%	1%	9%	37%	52%
Ability to book online	16%	14%	24%	26%	20%
No curfew / rules	10%	11%	27%	27%	25%

## Points of Interest

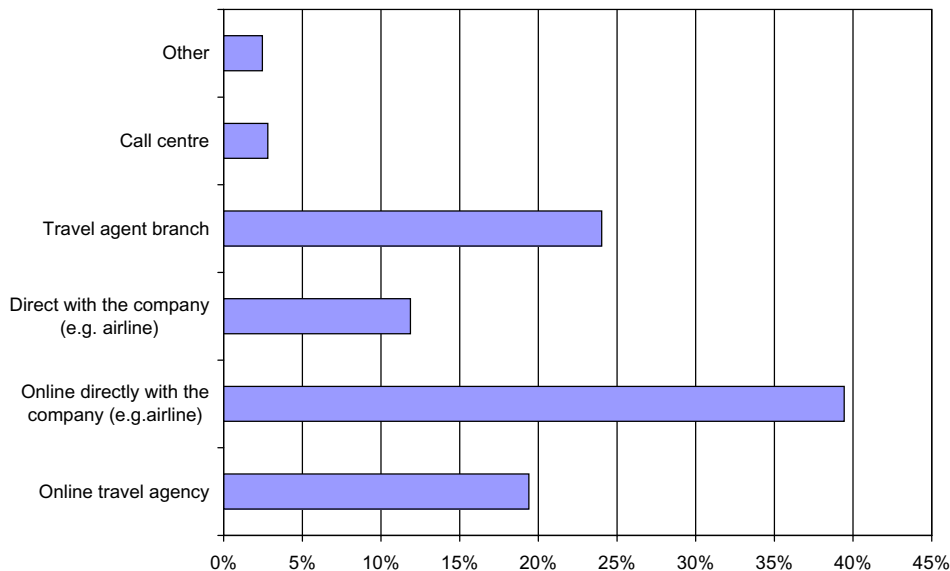
- Interestingly, brand reputation didn't factor as an overly important influence.
- It's also worth noting that the ability to book online did not feature as highly as might be expected in this Internet age.

Hypothesis: Hostels are traditionally viewed as budget accommodation, therefore user expectations of such factors as service levels and brand reputation are generally considered to be of less importance.

# Booking Methods

The subject of Booking Methods generated some interesting results, particularly when analysed with the findings from the section on Information Sources. Whilst online channels remain the most popular booking method, travel agents also polled well. This is encouraging given the lower use of travel agents in the information gathering stage, suggesting that travellers like to feel empowered by conducting the preliminary research themselves, however, still enjoy the security of booking face to face with an actual person.

## Booking Methods – Global



## Points of interest

- Dealing directly with the company online was the most popular response with 39%, which could be due to reward programs and the trust travellers place in well known brands.
- A contributing factor to the popularity of online booking direct with the company is the discount incentives offered by airlines.
- Another big factor is trust. Consumers are more likely to purchase using the Internet if the site is attached to a brand they know and trust.
- While online travel agents only rated third, this could well be a growing industry with the increased consumer comfort of transacting online. Sites that provide unique and compelling offerings are likely to become market leaders in this field

**Hypothesis: Price is becoming a major incentive to book online. Airlines introduced an 'internet fares' strategy, other travel services are starting to follow suit.**



# Questionnaire

## 1. What is your favourite part of the world to explore?

Europe  
Asia  
Australasia & The Pacific  
North America  
South & Central America  
Africa  
Middle East  
Indian Subcontinent

## 2. What is your FAVOURITE country (of the countries you've visited)?

Drop-down A-Z of countries

## 3. Which country would you most LIKE to visit in the future?

Drop-down A-Z of countries

## 4. It's a big world. How many countries have you visited?

None  
1-3  
4-10  
11-20  
21-30  
31+

## 5. We live and breathe travel, how important is it to you?

1 – Don't Care  
2  
3  
4  
5 – Extremely Important

## 6. Overall, how often are you travelling compared with the past?

More than ever  
About the same as always  
Less than before  
Not sure

## 7. Which description(s) best reflects your travelling style?

Fully independent  
Semi-independent  
Working holiday  
Study language  
Tour group  
Clubbing  
Package or resort  
Niche interest (eg skiing, diving)  
Regular destination (eg holiday house)  
Visiting family/friends

## 8. Who do you normally travel with?

Alone  
Friends  
Family  
Partner

**9. What gets you psyched about travelling? What's most important to you? (Rate on a 1–5 scale, where 1 = not important and 5 = extremely important)**

- Making new friends with other travellers
- Contributing to places visited
- Interacting with locals
- Relaxing or escaping life for a while
- Finding myself / personal growth
- Exploring non-tourist areas
- Visiting friends and family
- Challenging my abilities
- Exploring other cultures
- Sense of adventure
- Attend events (sports, music etc)

**10. What are the major barriers limiting the amount you travel?**

- Interrupting my career
- Family commitments
- Financial commitments (mortgage etc)
- Not enough money
- Not enough free time

**11. Which of the following best describe your budget when travelling?**

- Luxury
- High budget
- Mid-range
- Budget

**12. A 'short break' lasts less than seven days. How many short breaks did you take in the last 12 months?**

- None
- 1–3
- 4–6
- 7 or more

**13. If you did take a short break with the last 12 months, where did you go?**

- In the country where I'm living
- To another country
- Combination of both
- Not relevant

**14. When looking for travel information BEFORE travelling, how often do you consult the following sources? (Please indicate Frequently, Occasionally or Never)**

- Web
- TV travel shows
- Guidebooks
- Newspapers / magazines
- Word of mouth
- Travel agents
- Tour brochures
- Other (please state)

**15. For what purposes do you use guidebooks? (Select all that apply)**

- Researching potential destinations
- Pre-planning or booking once the destination/s has been decided
- Deciding where to go next while on the road
- Practical information when on the road
- As a gift for someone who is travelling
- Do not use guidebooks
- Other (please state)

**16. Which of the following guidebooks have you used in the past?**

Lonely Planet  
Rough Guide  
Let's Go  
Eyewitness  
Fodors  
Frommers  
Footprint  
Baedeker  
Routard  
Michelin  
Rick Steve's  
Moon  
Other (please state)

**17. Which guidebooks do you plan to use on your NEXT trip?**

Lonely Planet  
Rough Guide  
Let's Go  
Eyewitness  
Fodors  
Frommers  
Footprint  
Baedeker  
Routard  
Michelin  
Rick Steve's  
Moon  
Other (please state)

**18. Question omitted from analysis**

**19. If you stayed in hostels while travelling, which was your favourite?**

Hostelling International  
Hostelworld.com  
Hostels of Europe  
Base Backpackers  
Nomads World  
VIP Backpackers  
YHA  
YMCA/YWCA  
Other (please state)

**20. What are the major influences of your choice of hostel?**

Brand reputation  
Cost  
Independent quality rating  
Location  
Ability to book online  
No curfew / rules  
Other (please state)

**21. How do you prefer to book your travel arrangements?**

Online travel agency  
Online directly with the company (eg airline)  
Direct with the company (eg airline)  
Travel agent branch  
Call centre  
Other (please state)

**22. Question omitted from analysis**

**23. On your last trip, what percentage of your travel budget did you spend on the following?**

Transportation  
Food  
Accommodation  
Other activities

**24. If you have travelled as a “young independent traveller” (backpacker, study or work abroad, exchange student, volunteer work), what impact has this had on your perception of the following?**

Responsible travel habits  
Developing positive personal values and ethics  
Your respect for other cultures  
Your interest in issues of social justice, poverty, world peace  
Your overall lifestyle  
Your career choice  
Tendency to travel independently

**25. Are you male or female?**

Male  
Female

**26. How old are you?**

Under 18  
18–24  
25–34  
35–44  
45–54  
55–64  
65+

**27. What country do you currently live in?**

Drop-down A–Z of countries

**28. What is your major occupation?**

Student  
Professional  
Clerical  
Service/Sales  
Homemaker  
Unemployed  
Retired  
Other (please state)

**29. What is your marital status?**

Single  
Cohabiting Couple  
Married Couple  
Divorced  
Widowed

**30. From the following, which best describes your life?**

Living alone  
Living in shared house  
Couple – no kids  
Family – kid/s under 12 years  
Family – kid/s 13+ years  
Mature couple – no kids at home  
Mature single – no kids at home

**31. What is the highest level of education you have completed (or are currently studying towards?)**

Primary  
Secondary  
Certificate/Diploma  
Degree  
Post-Graduate

# Travellers' Pulse Survey



**This survey analysis was produced by Lonely Planet** in conjunction with STA Travel, VisitBritain, ISTC, Hostelling International and MTV. For further information contact:

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**I live**

**therefore I travel**

