



RT Strategies

Interviewing: October 19 -
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Sample: 2,011 non-U.S. resident
international travelers

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**RT Strategies
Thomas Riehle and Lance Tarrance, Partners
&
Discover America Partnership
Travel Poll**

All numbers represent percentages unless otherwise labeled.

SCREENER

1. Are you or is anyone in your household currently an employee of a market research company, advertising agency, news media outlet, in the travel business or a political consultant?

No..... 100
Yes -
Not sure/ refused..... -

2. Have you traveled outside the region where you live in the last 18 months-that is, have you traveled to any of the regions in gray on this map in the past 18 months? **(IF EUROPEAN RESIDENTS HAVE YOU TRAVELED TO COUNTRIES OUTSIDE OF EUROPE; IF ASIAN RESIDENTS HAVE YOU TRAVELED TO COUNTRIES OUTSIDE OF ASIA; IF SOUTH AMERICA COUNTRIES HAVE YOU TRAVELED OUTSIDE OF SOUTH AMERICA.)**

Yes 100
No..... -
Not sure/ refused..... -

3. What regions have you traveled to? Just click on a region to indicate you have traveled there in the past 18 months.

United States 29
Europe 27
Africa..... 19
Middle East/ Sub Asia..... 19
Australia/ New Zealand..... 17
Asia..... 14
Canada 9
Caribbean 6
Mexico 5
Central and South America..... 4
None -
Not sure/ refused -

DISCOVER AMERICA TRAVEL POLL

4. Just to get started, please indicate on the following table whether you have a generally favorable or unfavorable opinion of the following countries, using a **(ROTATE:)** 0 to 100/ 100 to 0 scale where, **(ROTATE:)** 0 means extremely unfavorable and 100 means extremely favorable/ 100 means extremely favorable and 0 means extremely unfavorable? Choose any number on the scale between 0 and 100, depending on how strongly you feel. **(RANDOMIZE:)**

	Extremely Unfavorable			Extremely Favorable	
	<u>0-25</u>	<u>26-50</u>	<u>51-75</u>	<u>76-100</u>	<u>Mean</u>
Unites States	14	20	22	43	63.7
(Among travelers to U.S.)	11	14	22	54	70.2
(Among never traveled to U.S.)	19	28	22	31	56.2
(ASKED OF ONLY HALF THE RESPONDENTS.)					
Canada	10	13	20	57	71.0
Mexico	16	32	27	25	55.4
Great Britain	11	15	24	50	68.7
France	12	14	23	51	68.4
Spain	8	15	27	50	70.0
Italy	9	15	25	51	70.3
Malaysia	21	29	24	26	63.3
China	26	30	20	24	49.9
Hong Kong	22	22	23	32	55.9
Japan	16	23	21	39	61.1
Australia	10	12	19	60	73.1
South Africa	19	31	27	23	52.6
Tunisia	29	31	22	18	46.0
United Arab Emirates	28	30	22	20	47.1
Israel	42	28	17	13	37.2
Saudi Arabia	39	32	15	14	38.9

5. Which ONE location on the map indicated BEST meets the requirement?

Offers good value for the money	
Europe.....	30
United States.....	16
Asia	11
Middle East.....	11
Africa	9
Australia/ New Zealand	8
Central and South America	4
Canada	4
Caribbean.....	3
Mexico	1
Not sure.....	-

Has convenient air service from [respondent's country] and reasonable travel time	
Europe.....	34
United States.....	18
Asia	10
Australia/ New Zealand	10
Middle East.....	8
Central and South America	7
Canada	5
Africa	4
Mexico	3
Caribbean.....	1
Not sure.....	-

People you meet there are welcoming and friendly to international visitors	
Europe.....	24
Australia/ New Zealand	17
United States.....	12
Central and South America	9
Canada	9
Middle East/ Sub Asia	9
Asia	8
Africa	7
Caribbean.....	3
Mexico	2
Not sure.....	1

Q.5 cont.

Traveler-friendly in terms of obtaining necessary documents or visas, and immigration officials who are respectful toward foreign visitors
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Europe	35
Asia	13
Canada	11
Australia/ New Zealand	10
Middle East.....	10
United States	8
Africa	5
Central and South America	4
Mexico	3
Caribbean.....	1
Not sure.....	1

Exciting cultural events, natural scenery, and recreation and many things to do

Europe	34
Australia/ New Zealand	16
United States	13
Middle East.....	8
Africa	7
Canada	7
Asia	6
Central and South America	4
Mexico	3
Caribbean.....	2
Not sure.....	-

A location I need to go to from time to time for business or family reasons

United States	29
Europe	23
Africa	10
Canada	9
Australia/ New Zealand	8
Middle East/ Sub Asia	8
Asia	7
Central and South America	3
Mexico	2
Caribbean.....	1
Not sure.....	3

6. And generally speaking, which one location on the map is the worst when it comes being traveler-friendly in terms of obtaining necessary documents or visas, and having immigration officials who are respectful toward foreign visitors?

United States	39
Middle East/ Sub Asia	16
Asia	12
Africa	12
Central and South America	7
Europe	6
Australia/ New Zealand	3
Canada	2
Mexico	1
Caribbean	1
Not sure	-

7. You have been selected for this survey because you travel internationally more often than average. Thinking about how travel broadens your awareness and understanding of the world, tell me whether this happens all the time, most of the time, some of the time, or almost never when you travel to a place.

	<u>All the Time</u>	<u>Most of the Time</u>	<u>Some of the Time</u>	<u>Almost Never</u>	<u>Not Sure</u>	<u>Total All/ Most/ Some</u>
You learn new things about the country you visit, and that alters your opinion of that country.....	42	41	16	1	-	98
You tell friends and relatives about your travel experiences	57	31	11	1	-	98
You develop a permanent relationship with that country as a result of visiting there	23	36	34	5	2	93

8. When it comes to developing an image in your mind about the U.S. in particular, which of the following, if any, have a significant effect on your overall opinion of the U.S. **(RANDOMIZE:)**
(ACCEPT AS MANY ANSWERS AS APPLY.)

Discussions with friends or relatives who have visited the U.S. recently.....	48
News reports about the U.S. and statements about the U.S. made by government officials in (respondent's country)	40
Reports about how travelers are treated by U.S. government officials, such as immigration and airport security officers	40
Movies, TV shows and other entertainment about the U.S.	39
Discussions with Americans you meet	35
What you learn on your own recent visits to the U.S.	33
Products and services of U.S. companies.....	24
Advertisements encouraging travel to the U.S. that have attracted your attention.....	22
All of the above.....	6
Not sure.....	2

9. Generally speaking, do you have a **(ROTATE:)** favorable or unfavorable opinion of the U.S.? **(IF FAVORABLE/ UNFAVORABLE, ASK:)** Is that very (favorable/ unfavorable) or only somewhat (favorable/ unfavorable)?

Total Favorable	72
Total Unfavorable	28
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Very favorable.....	19
Somewhat favorable	53
Somewhat unfavorable	21
Very unfavorable.....	7
Not sure	-

10. Do you feel the U.S. plays a **(ROTATE:)** positive or negative role in the world? **(IF POSITIVE/ NEGATIVE, ASK:)** Is that very (positive/negative) or only somewhat (positive/negative)?

Total Positive	57
Total Negative	43
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Very positive role	13
Somewhat positive role.....	44
Somewhat negative role	30
Very negative role.....	12
Not sure	-

11. And regardless of whether you find the U.S. an attractive travel destination or not, please indicate whether you **(ROTATE:)** agree or disagree with the following statements.

	<u>Agree</u>	<u>Disagree</u>
The U.S. is expensive and not a good value for my travel budget.....	46	54
The U.S. offers great freedom and opportunity to people living there	71	29
I am worried about the danger of U.S. travel, because of fear of a terrorist attack, or crime and safety issues in the U.S.....	54	46
The U.S. is more diverse than most countries, with many communities of people represented.....	76	24
When I think about travel to the U.S., I worry about the legal and security issues --new visa and passport rules, for example, or the way foreign visitors are treated by U.S. immigration officials and security officials when arriving or departing from U.S. airports	70	30
U.S. products are high-quality, brand-name products.....	66	34
I am so strongly opposed to U.S. policies in the world that I won't consider traveling there	33	67
Compared to other countries, the U.S. makes little effort to ask you to travel there	61	39

(ASKED ONLY OF THOSE WHO HAVE EVER TRAVELED TO THE U.S.)

12. Would you say you feel **(ROTATE:)** more favorable or less favorable toward the United States as a result of your visit to the United States?

More favorable.....	63
Less favorable	25
Not sure.....	12

(ASKED ONLY OF THOSE WHO HAVE EVER TRAVELED TO THE U.S.)

13. For each of the following statements, please just answer "Yes" or "No." **(RANDOMIZE ITEMS:)**

	<u>Yes</u>	<u>No</u>
I disagree with U.S. policies in the world, but that would NOT stop me from visiting the U.S.	72	28
I won't visit the U.S. because I worry that if I make a mistake or say the wrong thing to the U.S. immigration officials at the airport, I might be detained for hours or worse	36	64
I won't visit the U.S. because security officials at U.S. airports are rude to people who do not have U.S. passports	33	67
I won't visit the U.S. because I don't want my travel spending to go toward supporting the U.S. government's policies in the world.....	28	72

14. Suppose you learned that a visit to the U.S. required a visa and it would take (x days) to process the visa before you could go. Would you decide to visit the U.S. anyway, or would you not visit the U.S. if the visa process took that long? If it took...

Go down list in this order and record the point where respondent says "...Would NOT to visit the U.S."	
Mean.....	46.5
1 day	13
2 days	3
3 days	3
4 days	4
5 or 6 days	4
Between a week and two weeks	9
Between two weeks and a month	13
Between one to two months.....	9
Between two to three months.....	5
More than three months	23
Not sure	14

15. Have you had the occasion to start the process of applying for a visa for travel to the U.S. in the past 2 years, whether you actually received a visa or not?

Have started the process of applying for a visa to travel to the U.S. sometime in the past 2 years	26
Have not	71
Not sure	4

(ASKED ONLY OF THOSE WHO SAY THEY HAVE STARTED THE VISA PROCESS IN Q.15.)

16. In the past two years, have you ever started the process of applying for a visa for travel to the U.S. and then abandoned the application process before receiving a visa?

Have started the process of applying for a visa to travel to the U.S. sometime in the past 2 years, then abandoned the process before receiving visa....	40
Have not	58
Not sure	2

(ASKED ONLY OF THOSE WHO SAY THEY HAVE STARTED THE VISA PROCESS IN Q.15.)

17. In the past two years, have you ever been denied a visa for travel to the U.S., even if at a later time you were granted a visa?

Have started the process of applying for a visa to travel to the U.S. sometime in the past 2 years, and been denied a visa.....	30
Have not	68
Not sure	2

(ASKED ONLY OF THOSE WHO SAY THEY HAVE STARTED THE VISA PROCESS IN Q.15.)

18. In general, do you feel the U.S. visa application process is unreasonably inconvenient for travelers from your country?

U.S. visa application process is unreasonably inconvenient to travelers from (respondent's country)	55
Is fair	40
Not sure	5

19. Do you agree or disagree with the following statements:

	<u>AGREE</u>	<u>DISAGREE</u>
Once a person visits the U.S. and spends time there, that person is likely to become more friendly toward the U.S. and its policies in the world.....	61	39
I don't get the feeling the U.S. government really wants my travel business	57	43

(ASKED OF HALF THE RESPONDENTS.)		
The U.S. advertises itself as a travel destination for less often than other countries do.....	66	34
U.S. immigration officials are rude to foreign travelers and make it unpleasant to travel there	54	46
The U.S. is now one of the safest places in the world to visit, as a result of increased security	38	62
Once you get past the U.S. immigration officials at the airport, the U.S. travel experience is great.....	72	28
The U.S. is a particularly interesting place to visit because of the American people are so vibrant	68	32
If you make a simple mistake or say the wrong thing to security or immigration officials at U.S. airports, you might be retained for hours or worse	66	34

DEMOGRAPHICS

NOTE: Results for demographic questions represent all adults unless otherwise indicated.

Finally, just a few questions for statistical purposes only:

D1. Into which of the following categories does your age fall?

18-34	50
35-49	33
50-64	15
65 and older	2
Not sure/refused	-
Mean	36.4

D2. What is your marital status?

Married	52
Widowed	2
Divorced	7
Separated	4
Single, never been married	32
Not sure/refused	2

D3a. Do you have any children under age 18 living at home?

Yes, children at home	43
No, no children at home	57
Not sure/refused	-

(ASK ONLY THOSE WITH CHILDREN UNDER AGE 18 AT HOME IN Q.D3a.)

D3b. When your travel for leisure includes long-haul travel outside your region of the world, do you bring you children along all the time, most of the time, some of the time, rarely, or never?

All the time	24
Most of the time	27
Some of the time	30
Rarely	11
Never	7

D4. What is the highest level of education you have attained?

High School or less.....	18
Some college.....	17
College Graduate	65
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Grade school or some high school.....	1
Graduated high school	16
Some community college or university but did not finish.....	17
Completed a four-year college or university degree...	47
Completed post-graduate degree, such as a Master's or Ph.D or professional school such as law or medicine.	17
Refused/not sure.....	1

D5. What is your religion?

Christian	28
Roman Catholic	23
Buddhism.....	10
Hinduism.....	5
Islam	5
Islam – Sunni.....	3
Greek Orthodox	2
Judaism	1
Shinto	-
Islam – Shi'a	-
Sikhism	-
Bahai'l.....	-
Other.....	11
Refused/not sure	12

D6. Total annual household income in 2005.

Less than 25 th percentile.....	25
25 th to less than 50 th percentile.....	24
50 th to less than 75 th percentile.....	25
75 th percentile or more.....	24
Refused/not sure	1

D8. Indicate any region where you have close friends or relatives living at this time.
 (Record answers on map like the one used on Q3a/3b.)

Europe	54
United States	33
Australia/ New Zealand.....	23
Asia.....	20
Central and South America.....	19
Canada	15
Middle East.....	14
Africa.....	9
Mexico	3
Caribbean	2
None of these	4
Refused/not sure	-

D9. What is your country of citizenship—that is, what country are you a citizen of?

United Kingdom	10
China	8
Russia.....	8
Venezuela.....	7
Brazil.....	7
Japan.....	6
Argentina	6
Korea	6
India	6
France	6
Germany	6
Australia.....	6
Colombia	6
Italy	5
Turkey.....	5
United Arab Emirates.....	-
Other.....	4
Refused/not sure	-

GENDER:

Male	56
Female	44