



# THE STATE OF THE AMERICAN TRAVELER

PRESENTED BY

Destination  Analysts

MAY 2023

**DEEP | ACTIONABLE |  
DEFENSIBLE | TIMELY**



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# WITH US



Dave Bratton  
Founder/Managing Director



Jennifer Griswold  
Director of Marketing

# AGENDA

- Key Findings from the Latest Survey of American Travelers
- Voice of the Traveler: Live Discussion

# WELCOME



**ABHISHEK**

Chicago, IL



**RINA**

Irvine, CA



**MARK**

DFW, TX



**ALIERA**

Austin, TX



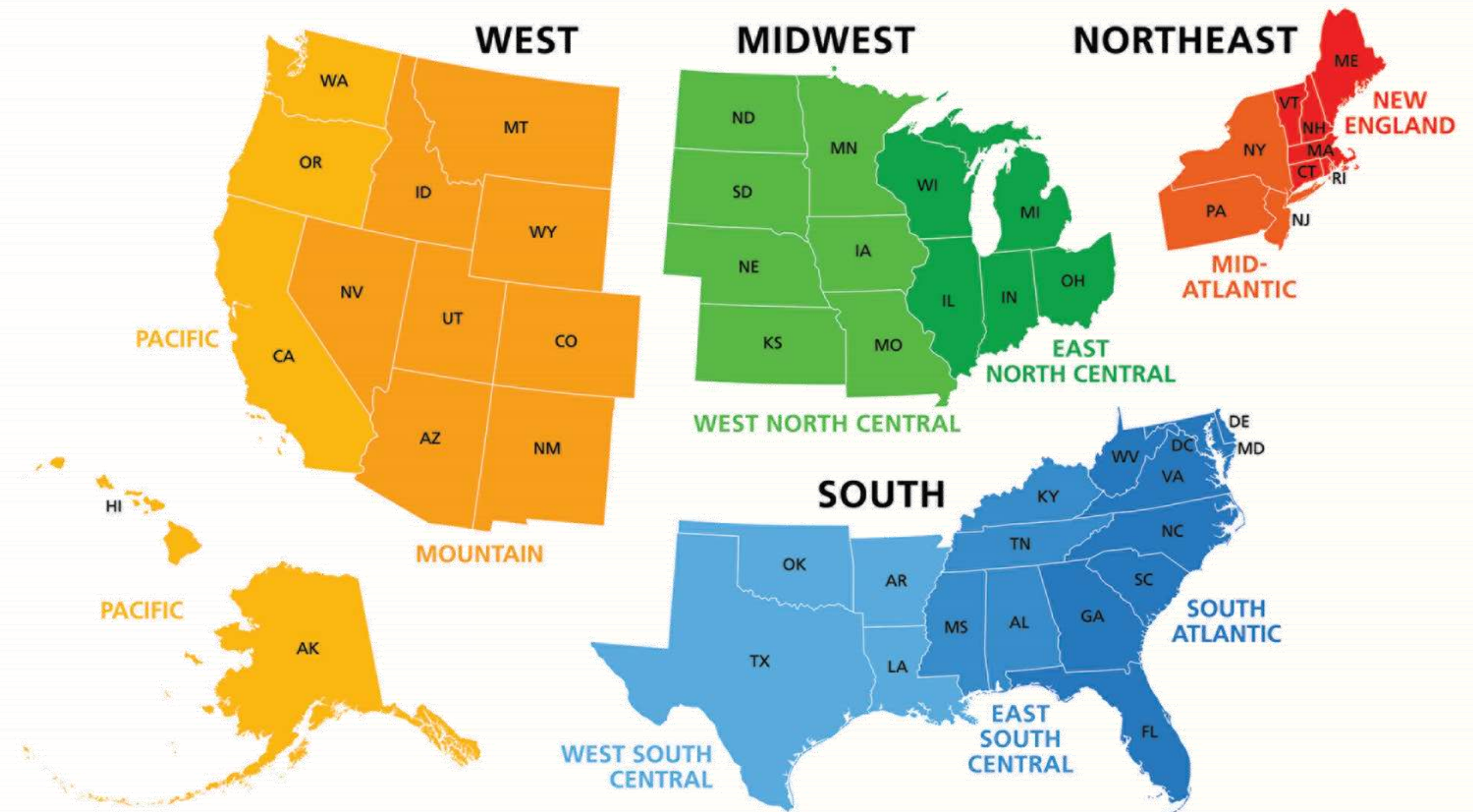
**KATRINA**

Parlin, NJ

# METHODOLOGY

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [April 16-21](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region

## UNITED STATES CENSUS REGIONS AND DIVISIONS





RECORDING + DECK 

**DESTINATIONANALYSTS.COM**

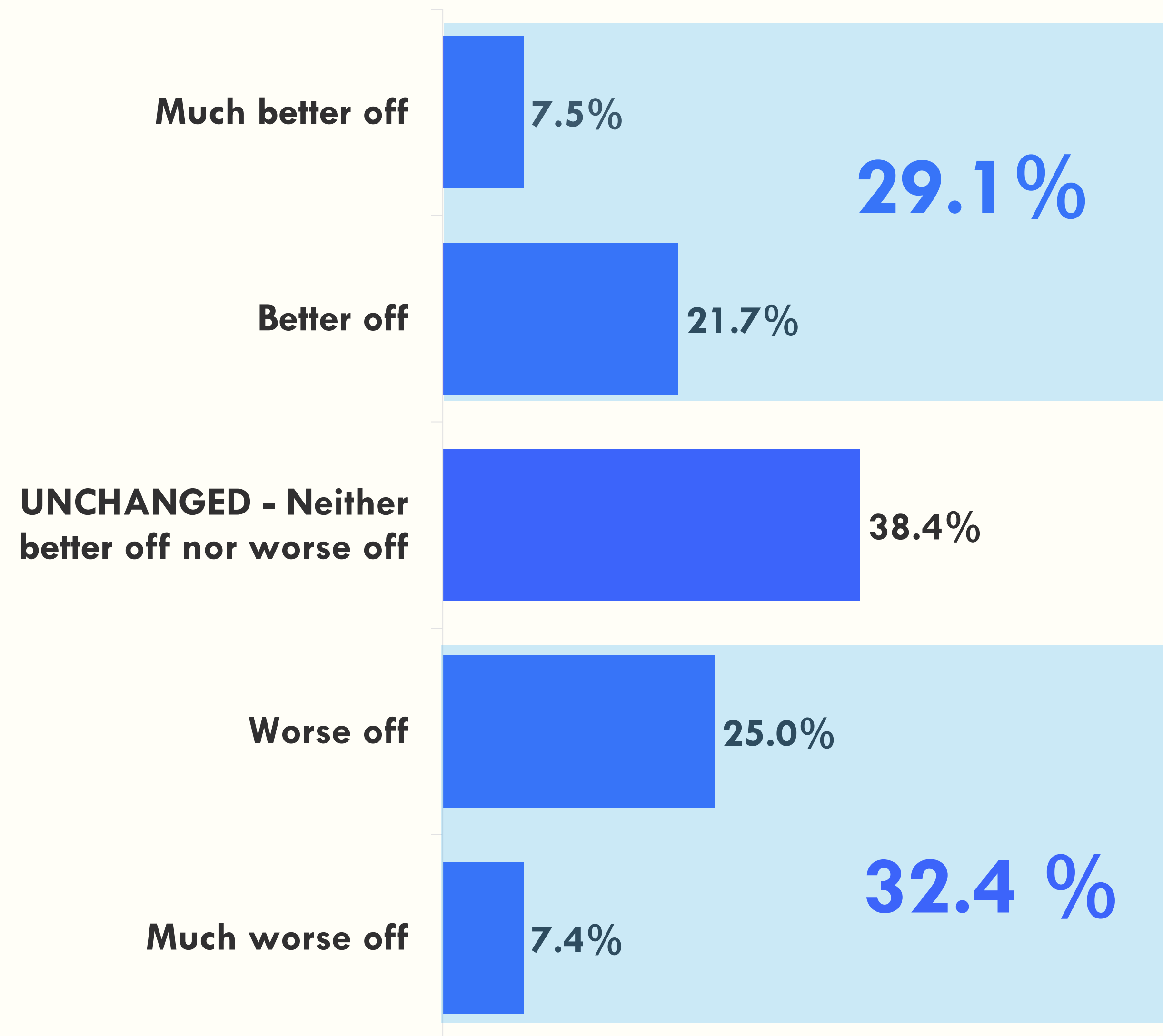


# TRAVELER SENTIMENT



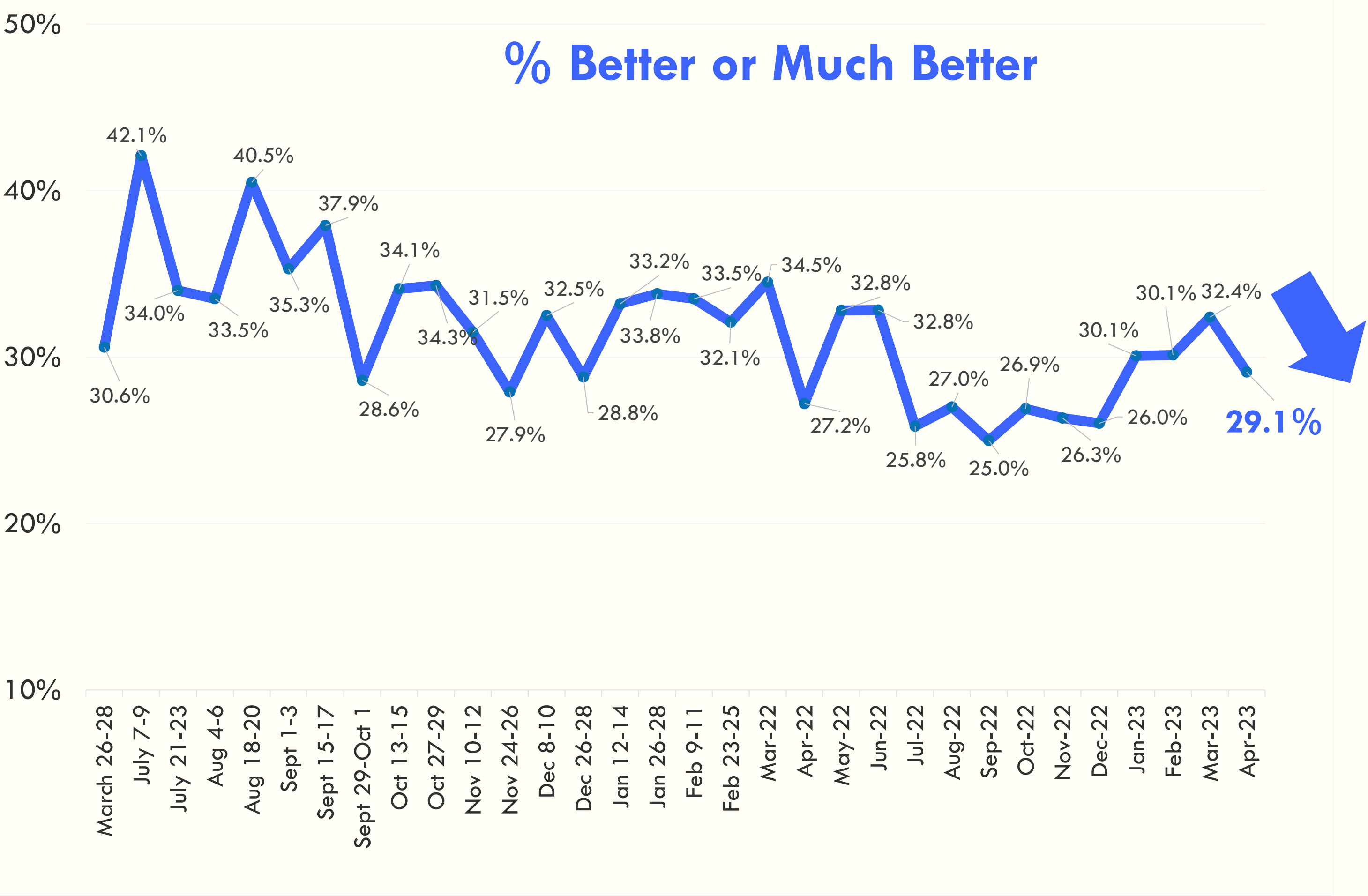
## Question:

Would you say that you (and your household) are better off or worse off financially than you were a year ago?



(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)

**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Travelers aren't feeling quite as good about their current financial situation as they were a few months ago.

## Question:

Thinking only of your household's finances, do you feel **NOW** is a good or bad time for you to spend money on leisure travel?

Yes - It is a very good time

8.1%

30.7%

Yes - It is a good time

22.5%

It is neither a good time  
nor bad time

36.0%

No - It is a bad time

21.8%

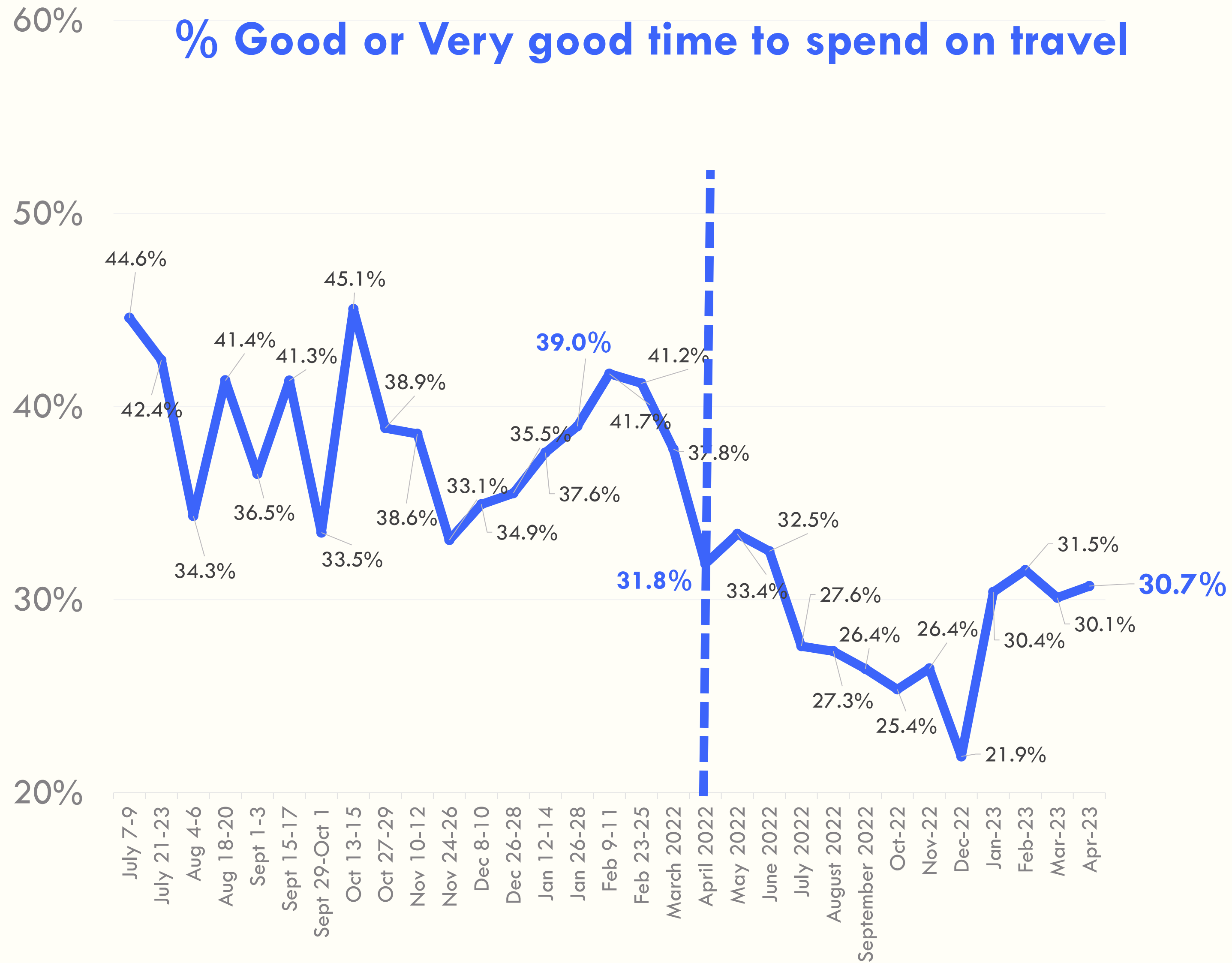
No - It is a very bad time

11.6%

33.4%

(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)

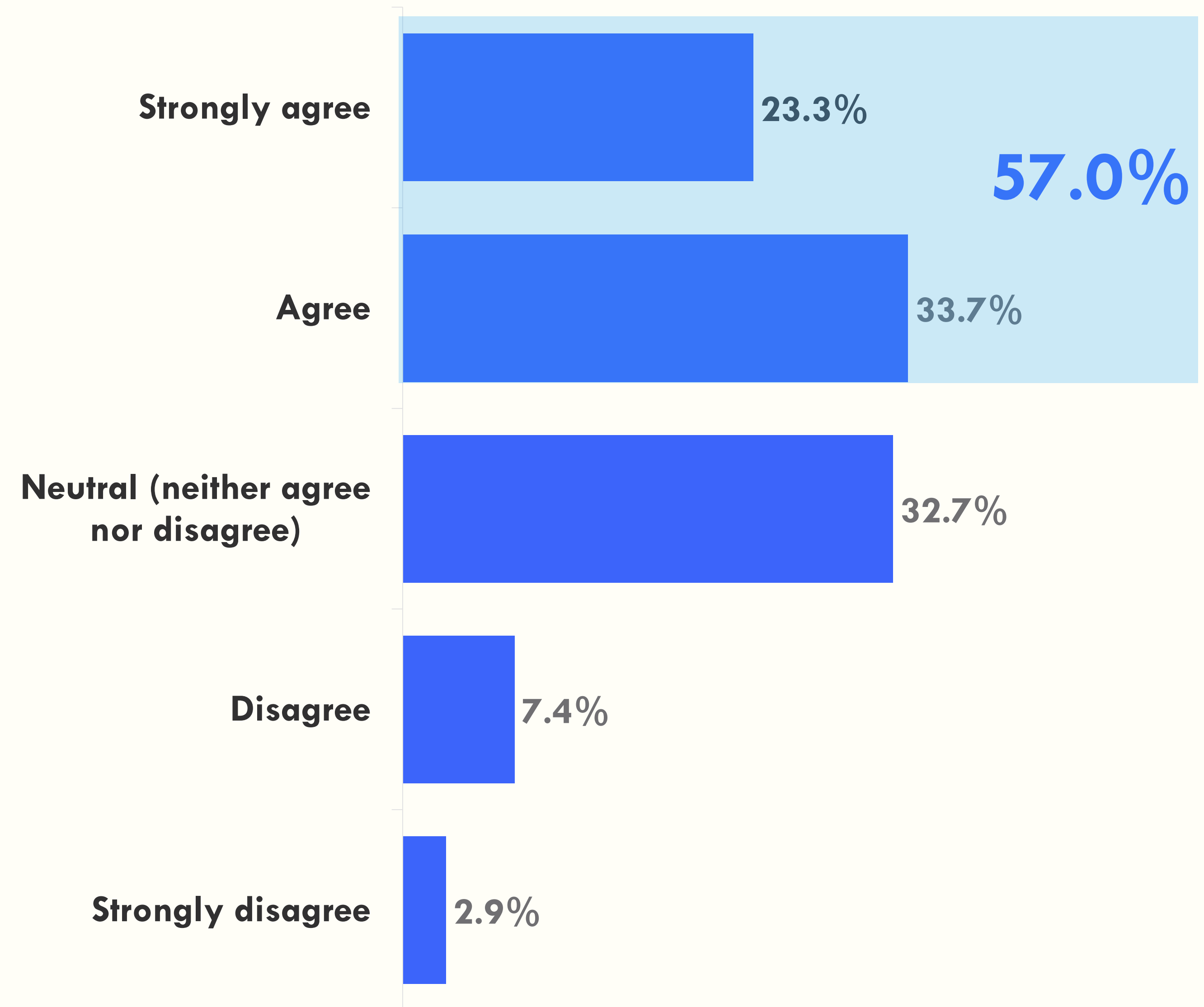
## % Good or Very good time to spend on travel



After a period of decline, the proportion of Americans who feel it is a “good time” to spend on leisure travel had rebounded but dropped again this month.

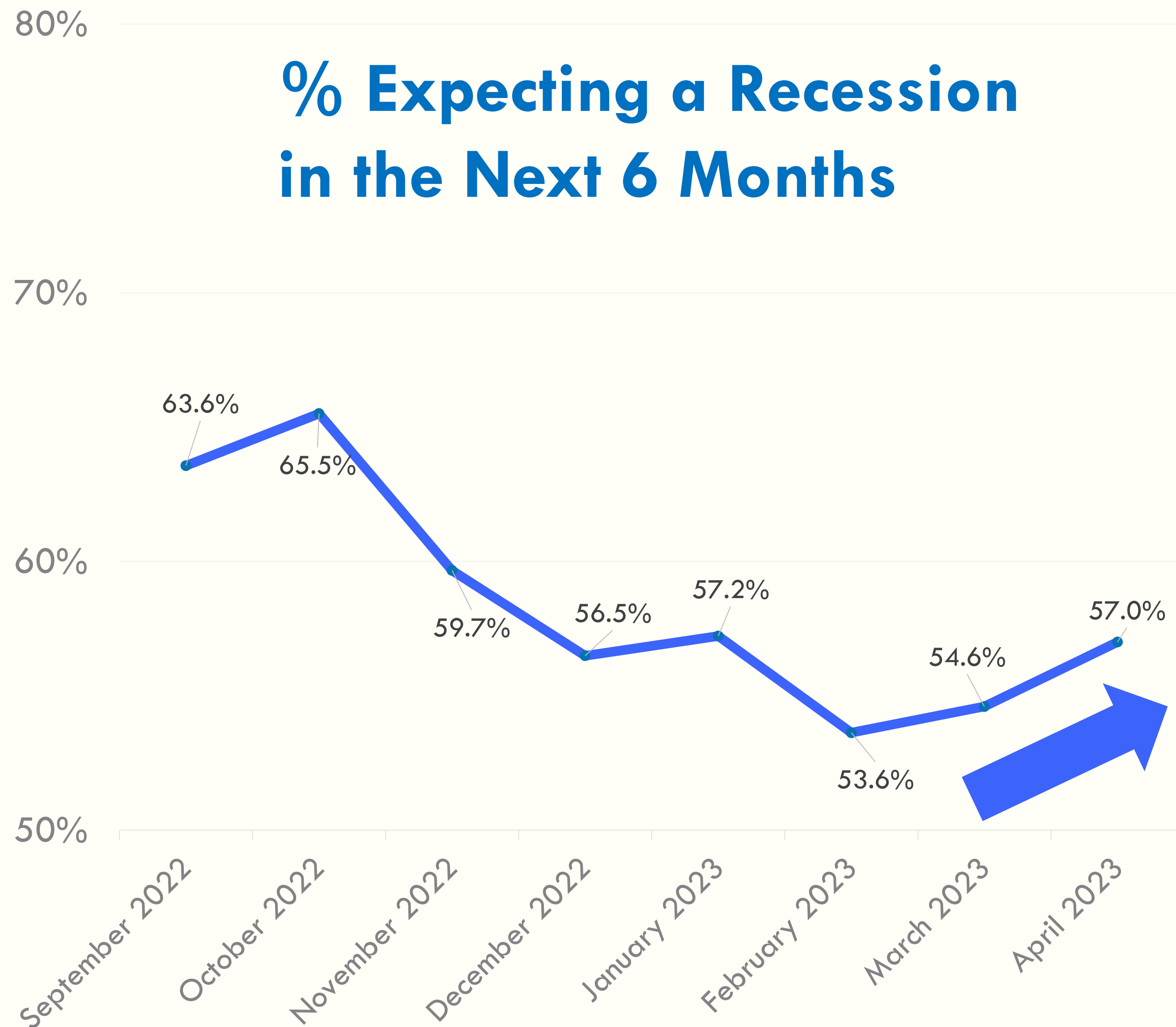
**Question:**

**I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.**



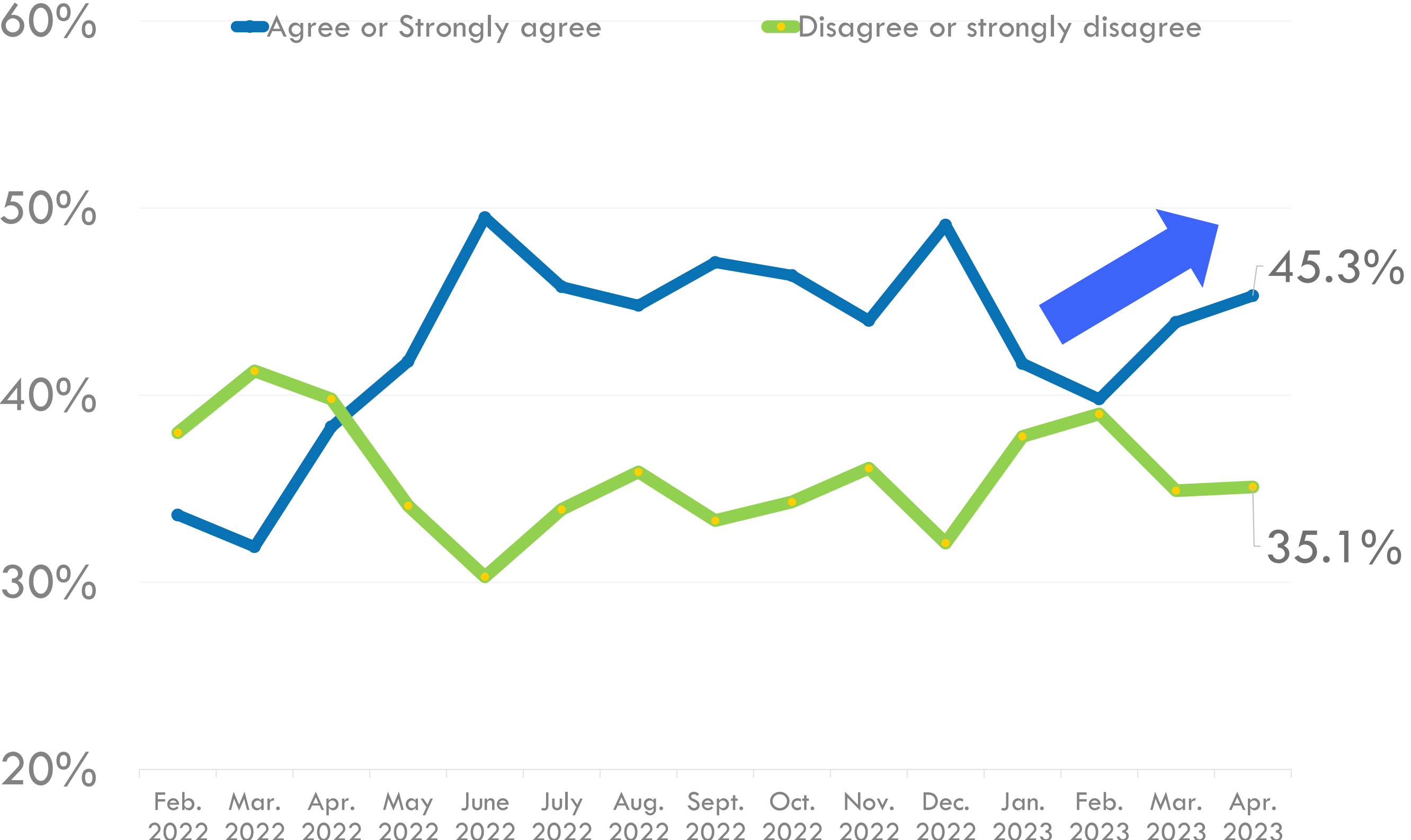
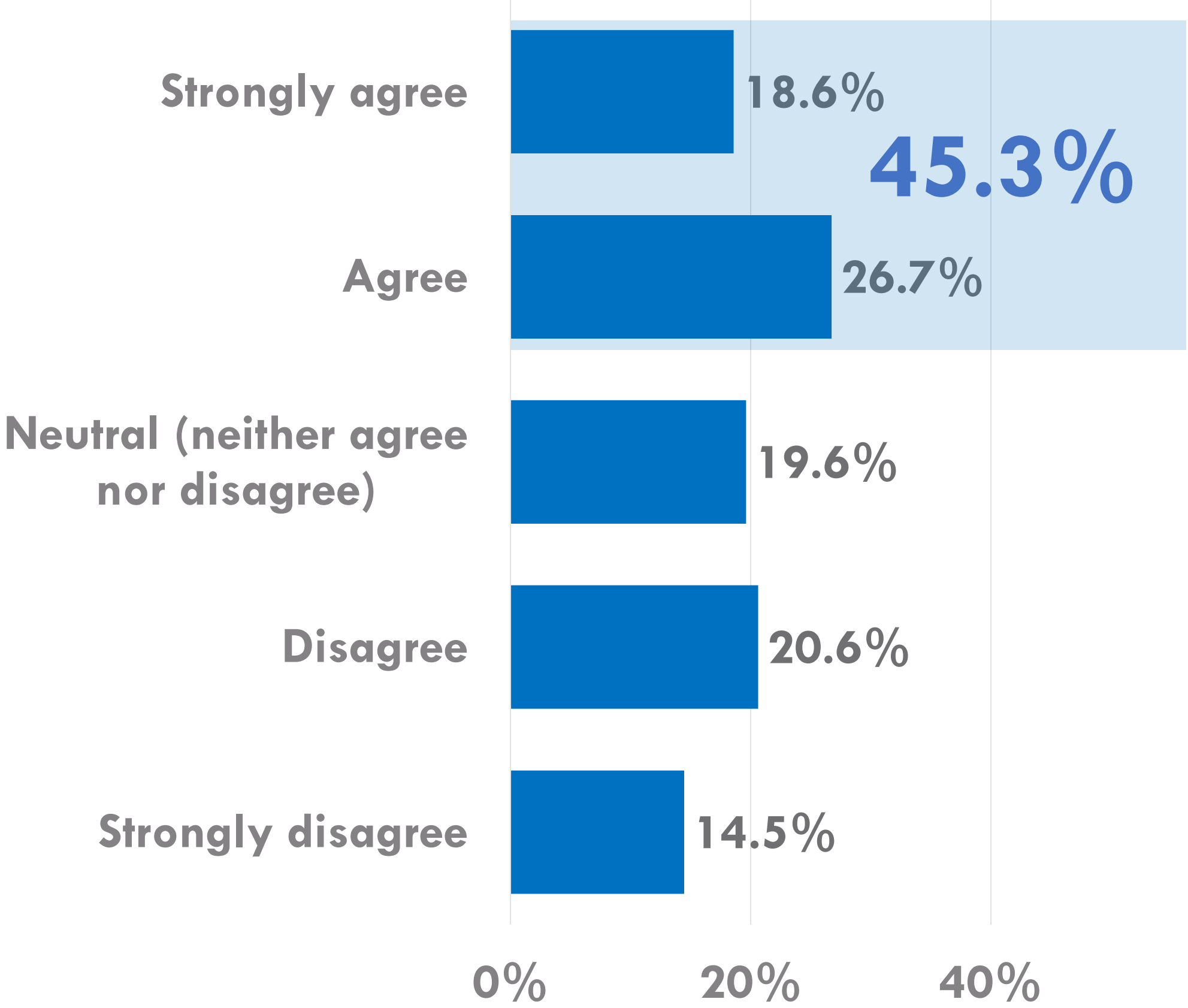
*(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)*

## % Expecting a Recession in the Next 6 Months



Recessionary fears continue to be widespread.

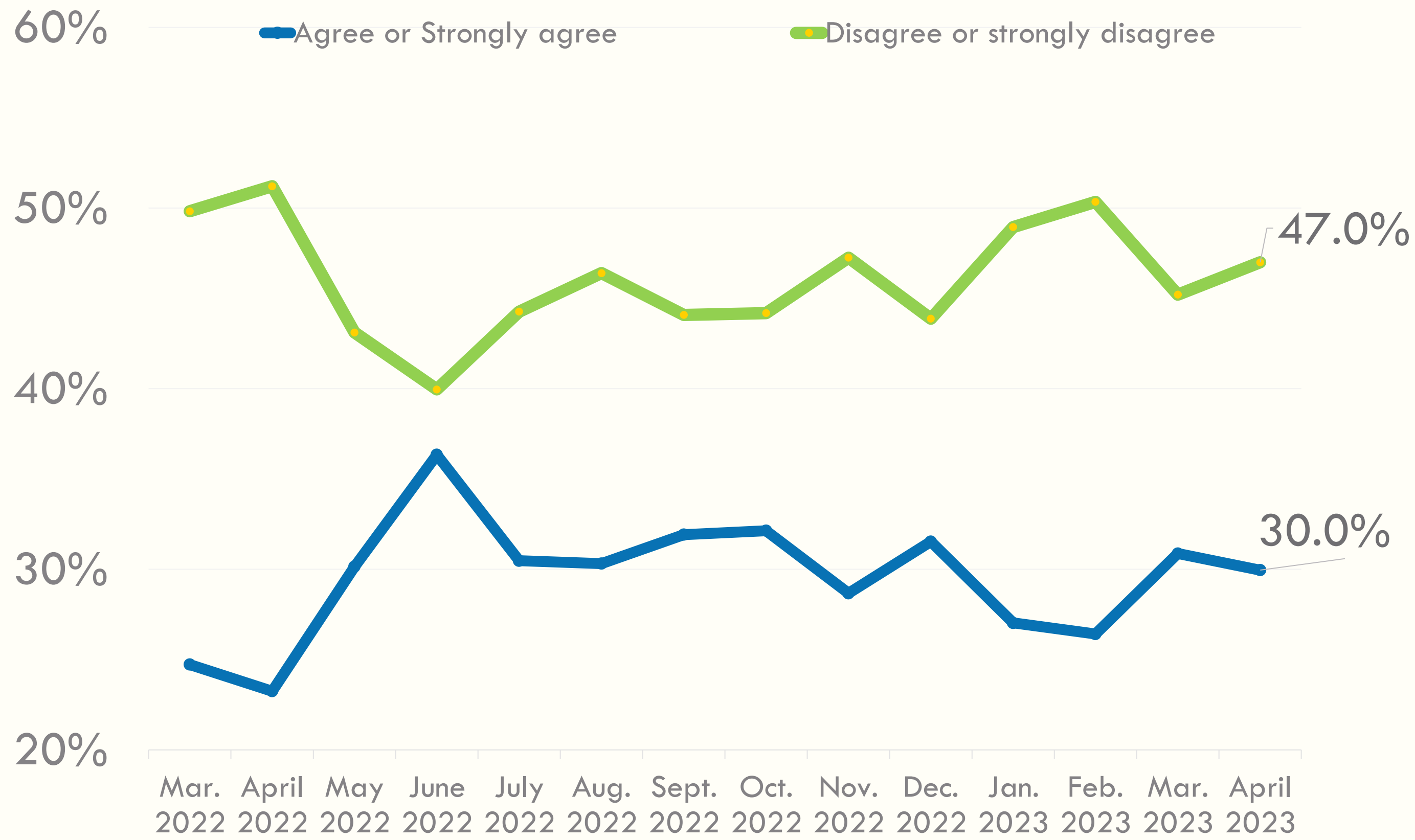
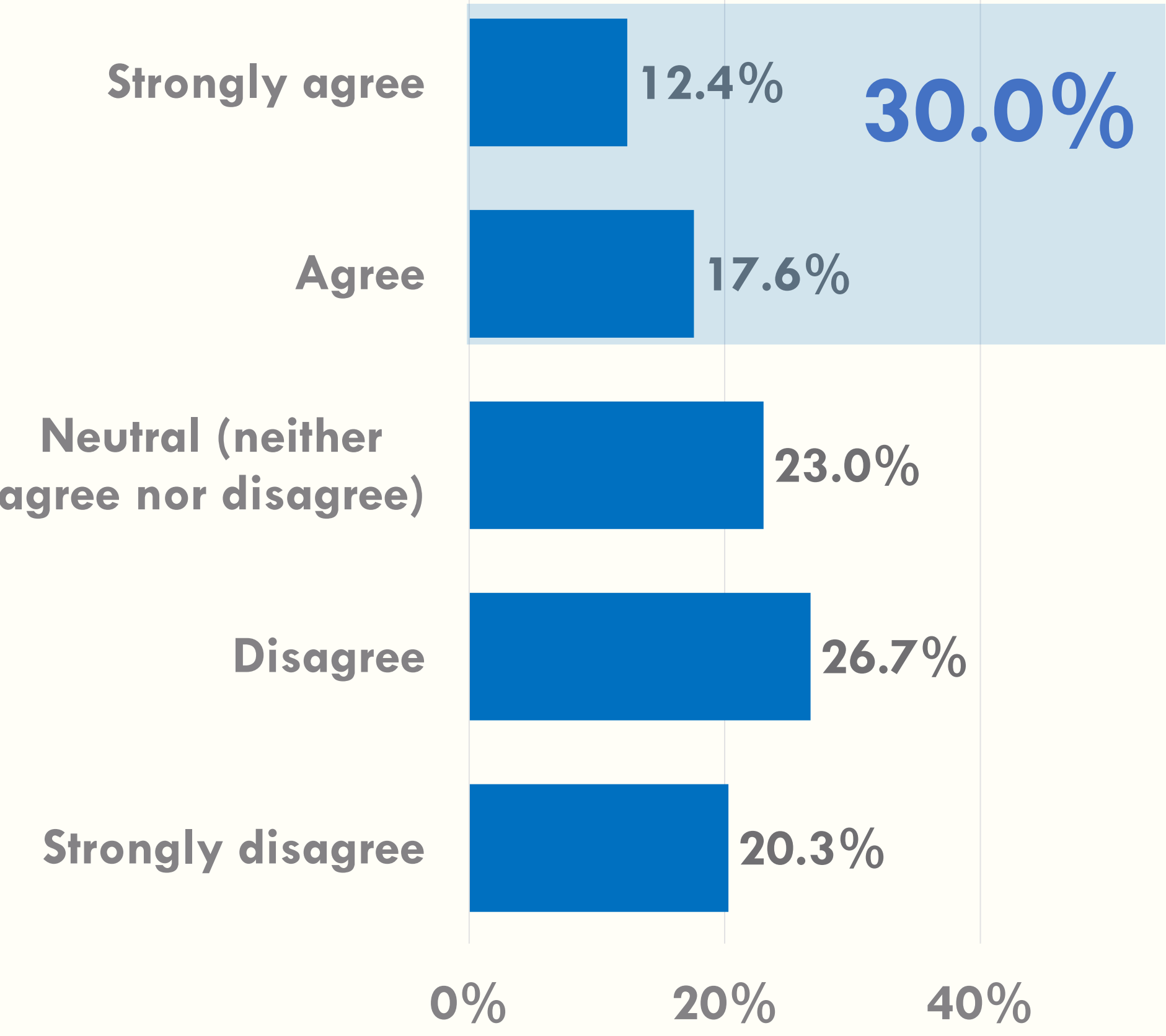
# Statement: High travel prices have kept me from traveling in the past month.



(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)



# Statement: Recent inflation in consumer prices has led me to cancel an upcoming trip.

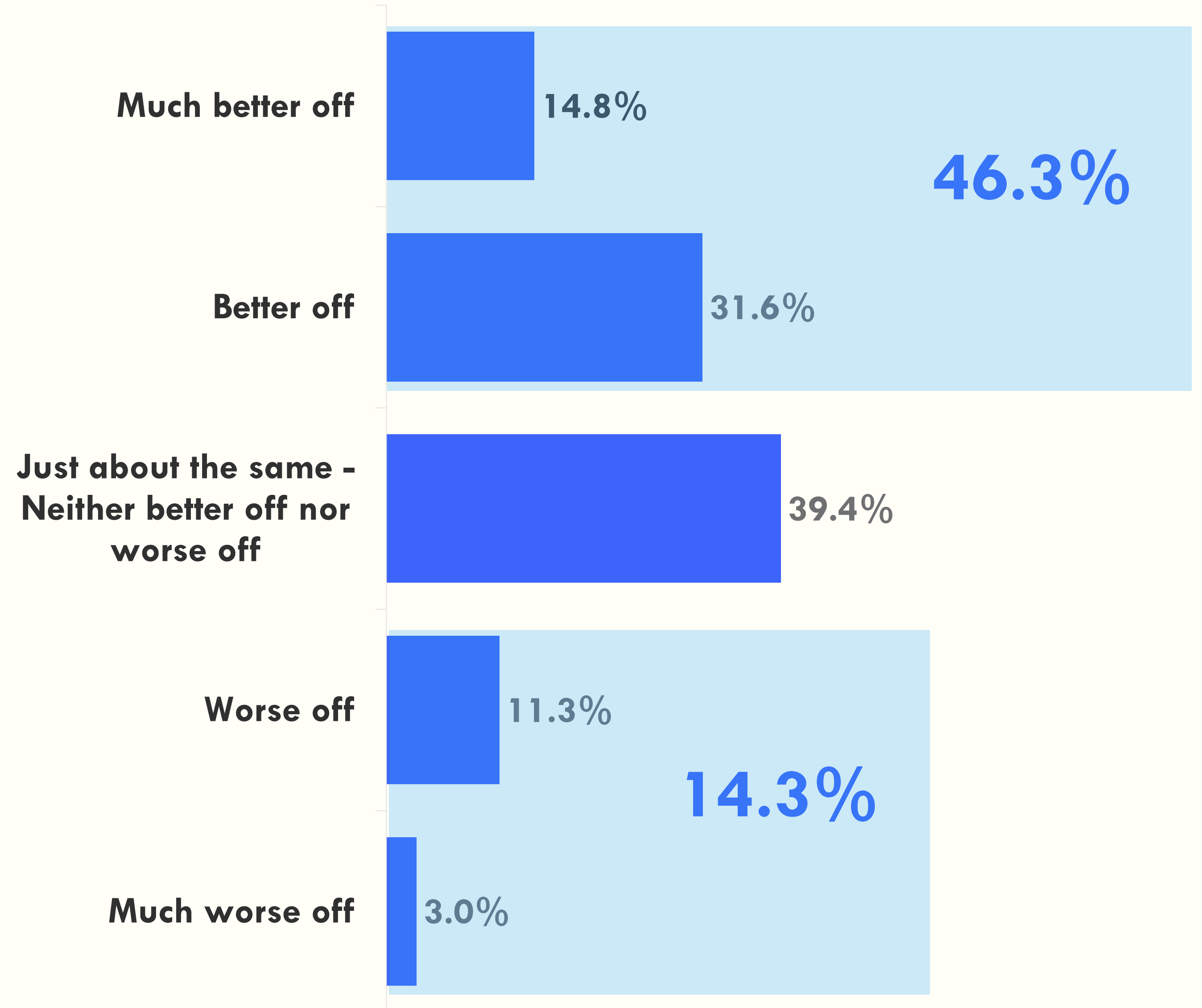


(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)



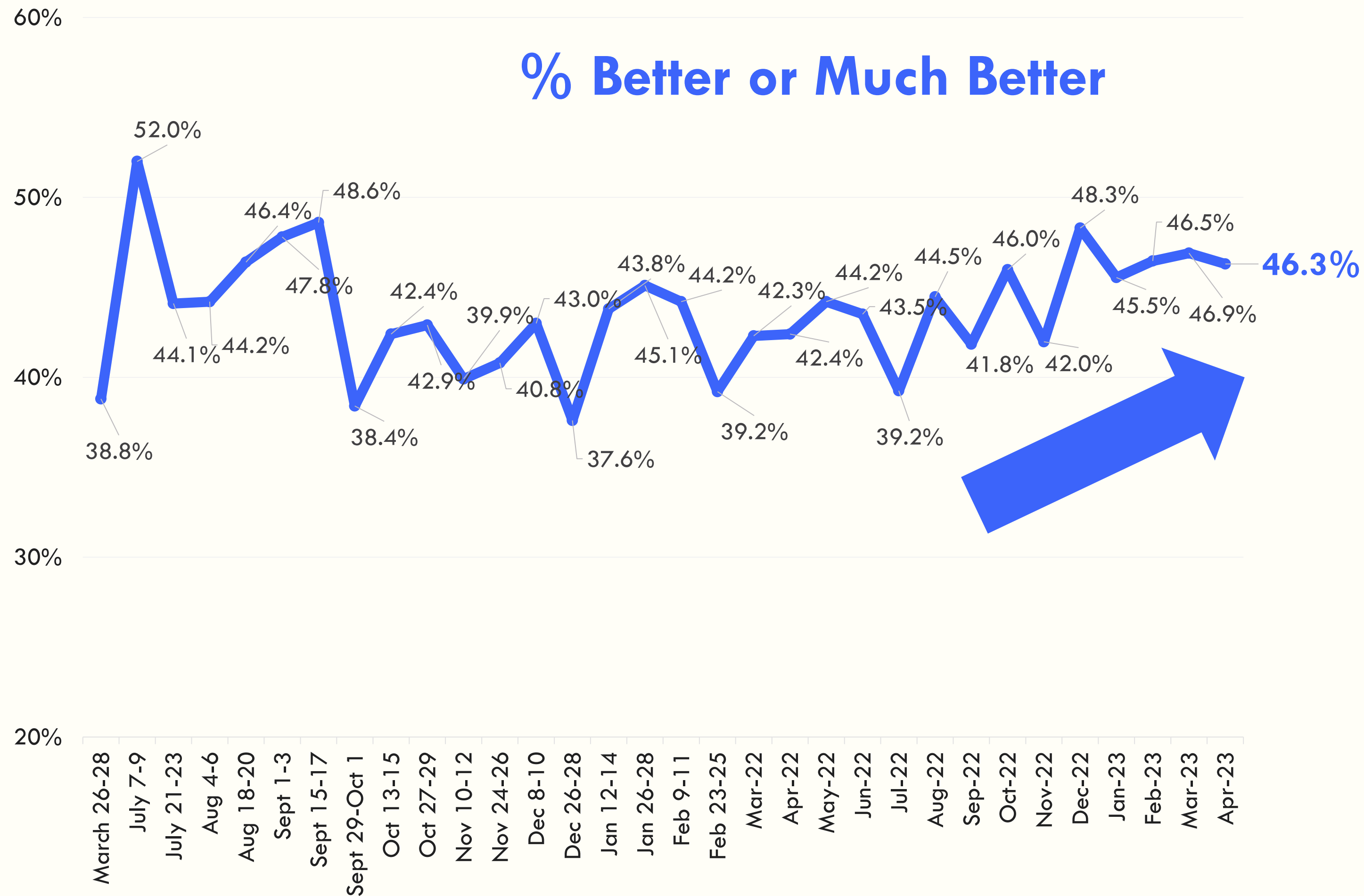
**Question:**

**LOOKING FORWARD -**  
**Do you feel that a year**  
**from now, you (and**  
**your household) will be**  
**better off financially, or**  
**worse off, or just about**  
**the same as now?**



(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)

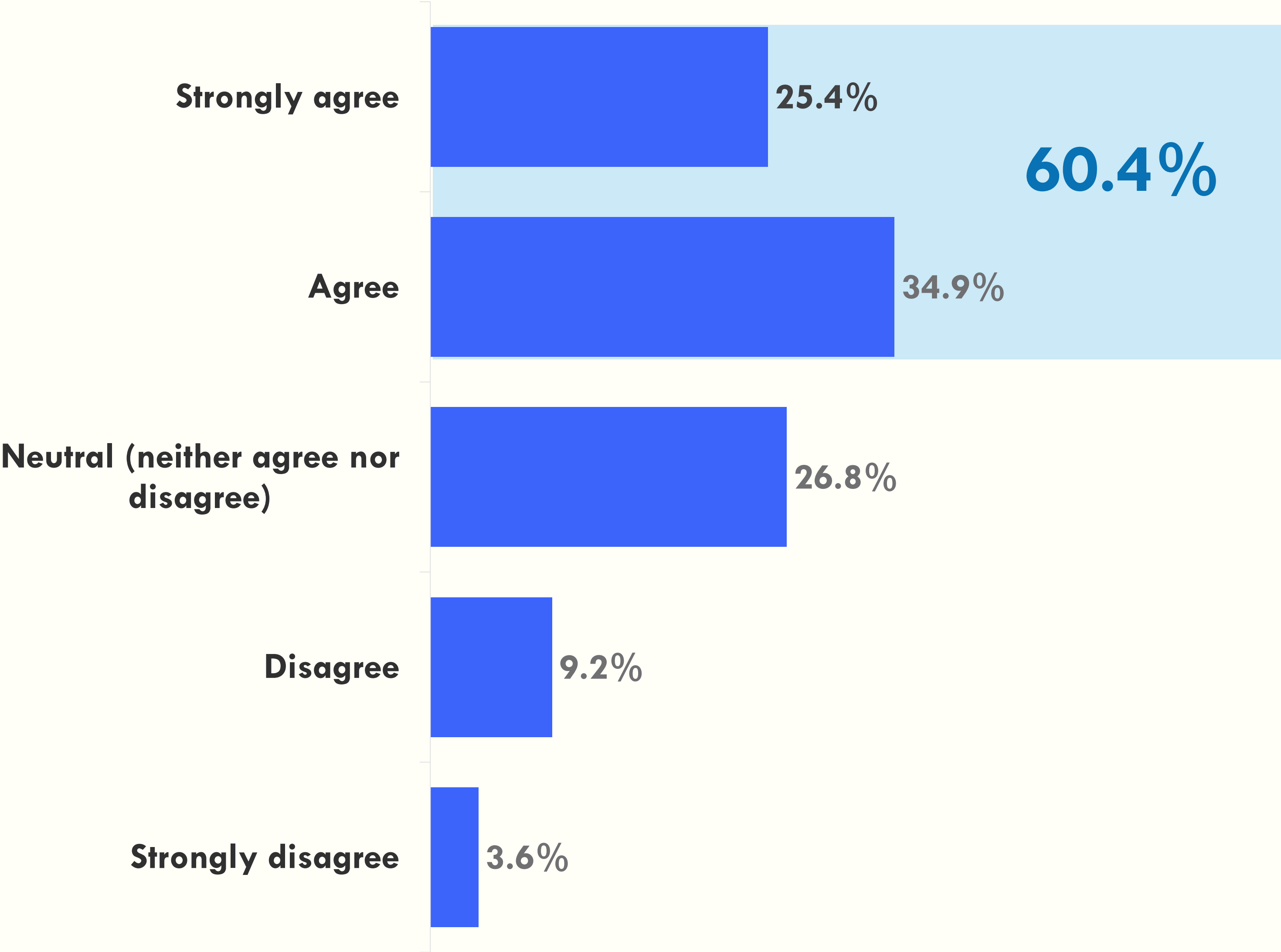
**Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?**



Traveler expectations for their financial prospects in the next year have been trending upward.

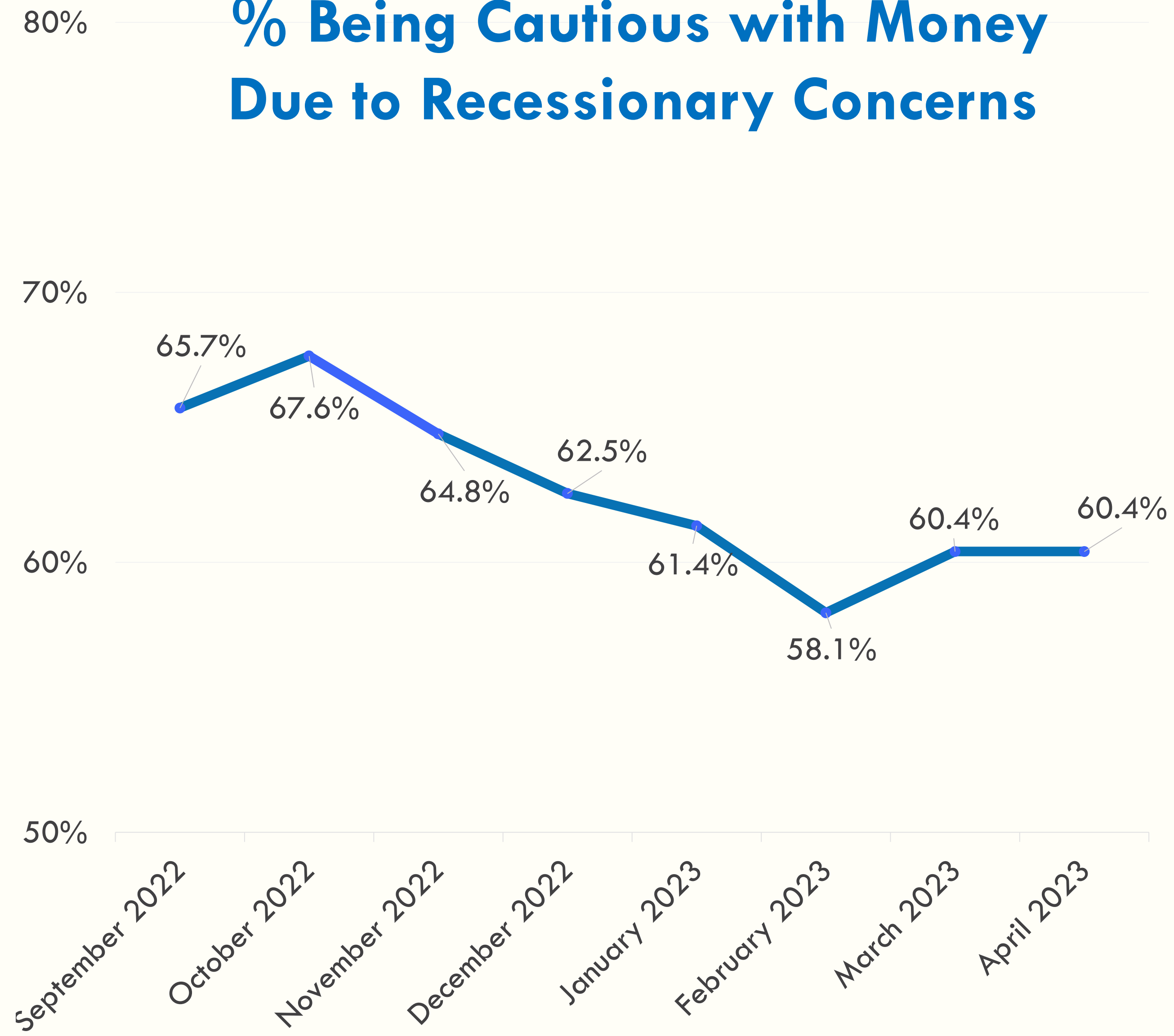
**Question:**

**Right now, I am being careful with my money because I'm concerned about an upcoming recession.**



*(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)*

## % Being Cautious with Money Due to Recessionary Concerns

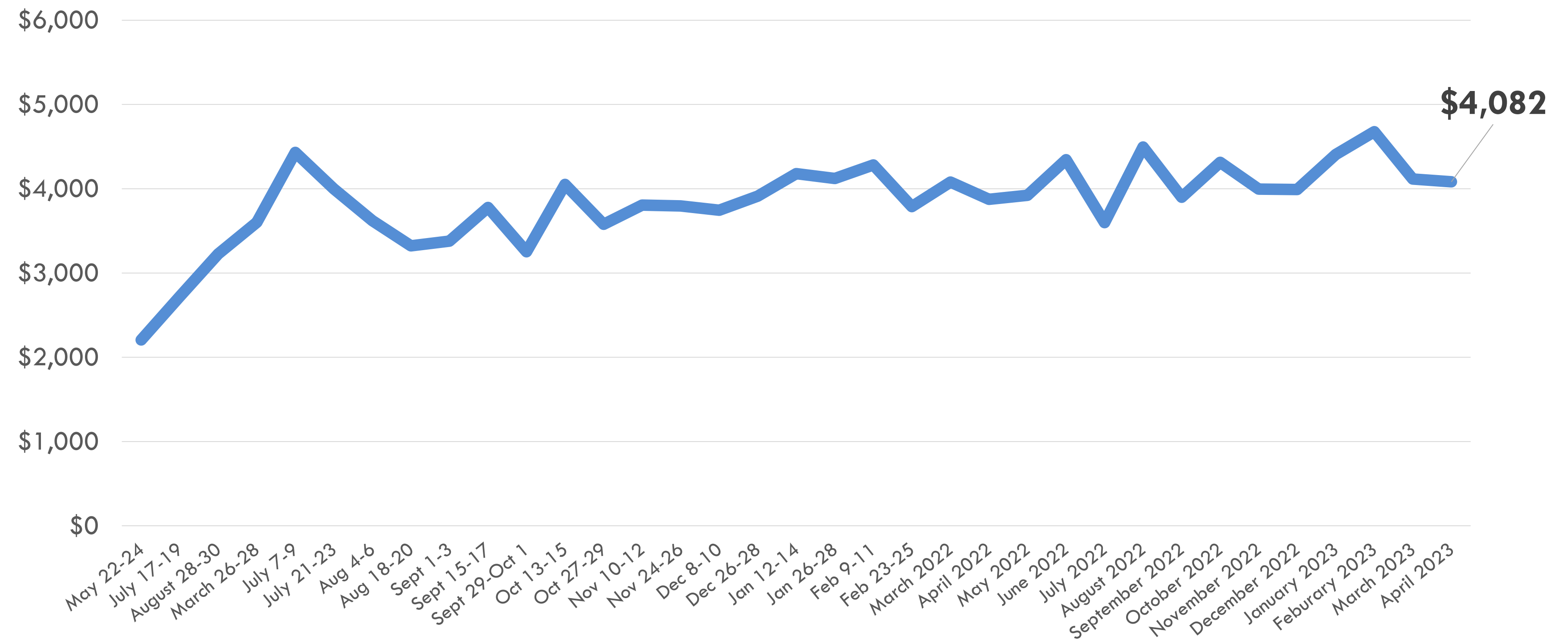


Fewer travelers are exercising spending caution due to concerns about a recession.

# MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS—TIME SERIES

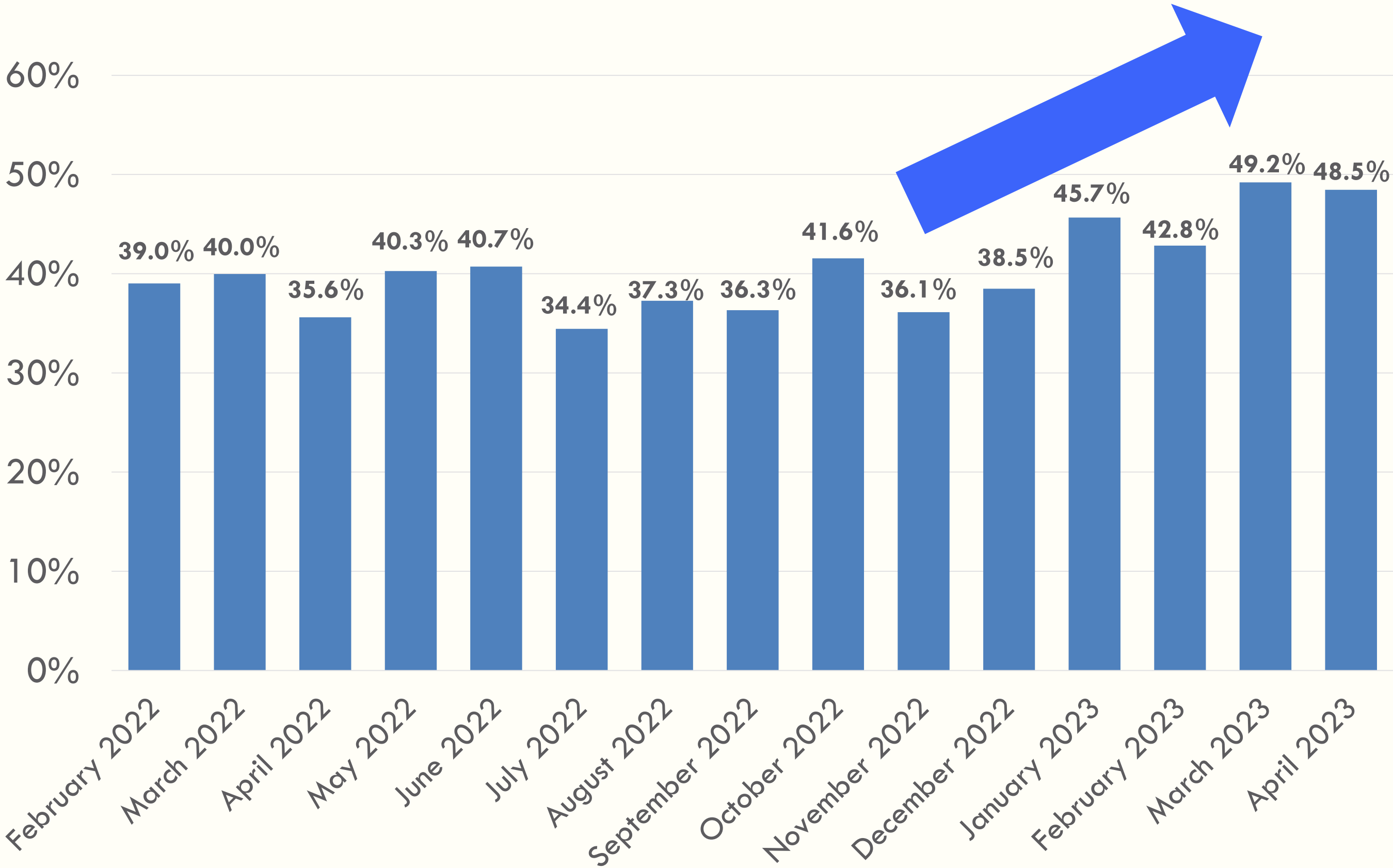
**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

**Maximum I would spend on leisure travel (next 12 months):**



(Base: All respondents, 1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022 and 2023)

# % Importance of Having at least One Luxury Travel Experience



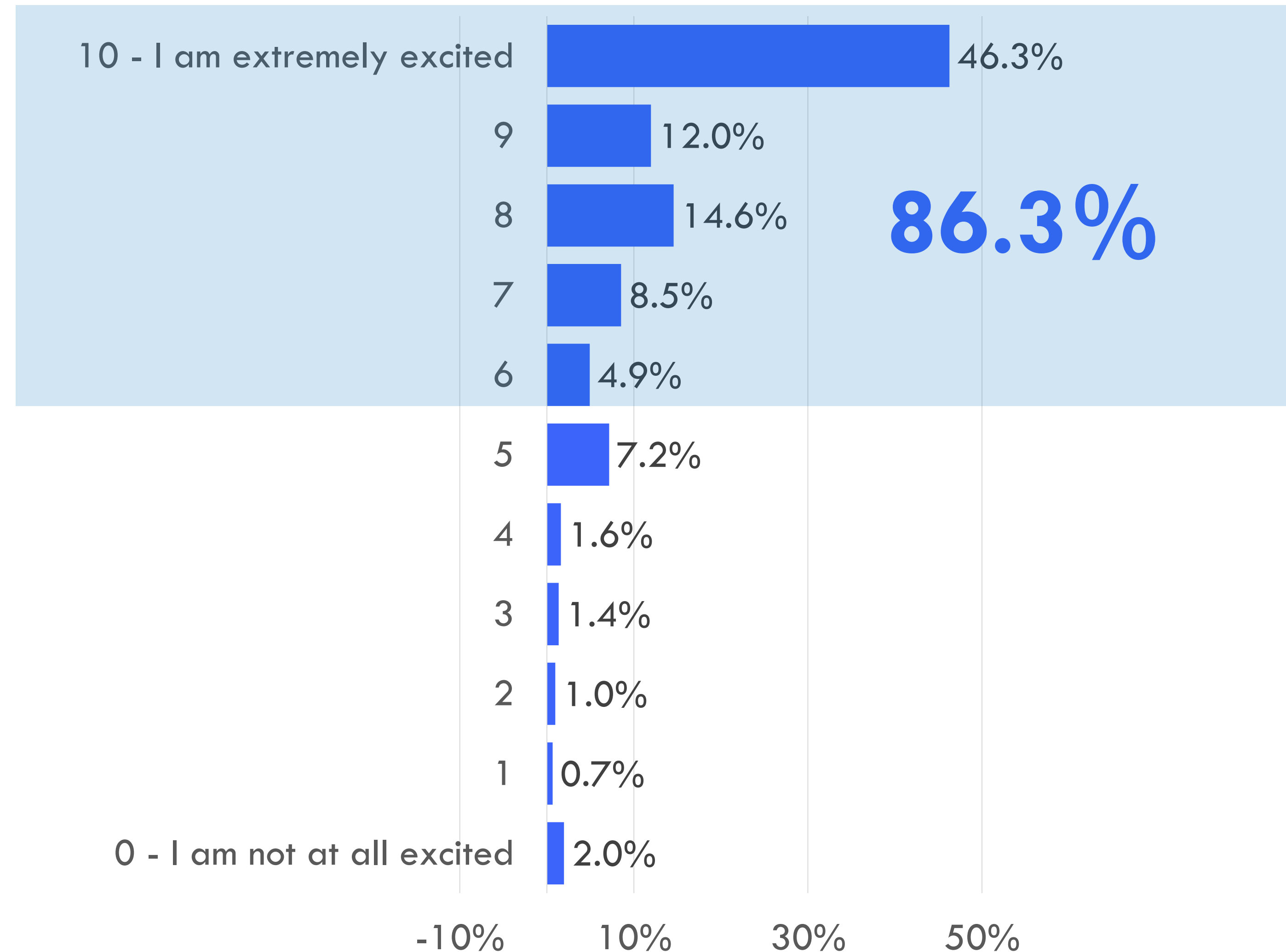
Travelers prioritizing having at least one luxury travel experience at a near high





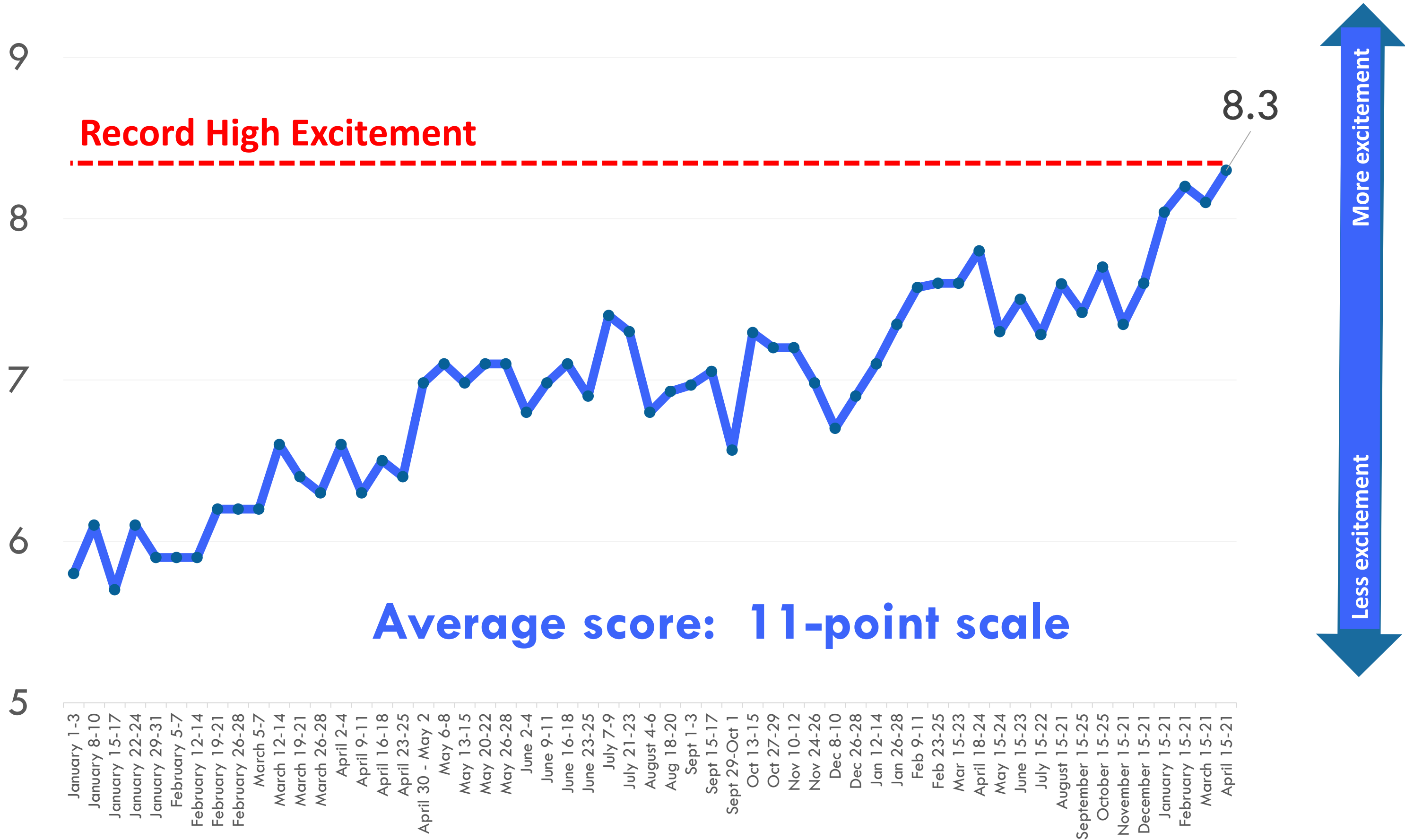
## Question:

Which best describes how excited you are about LEISURE TRAVEL in the **NEXT TWELVE (12) MONTHS?** (Please answer using the 11-point scale below)



(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)

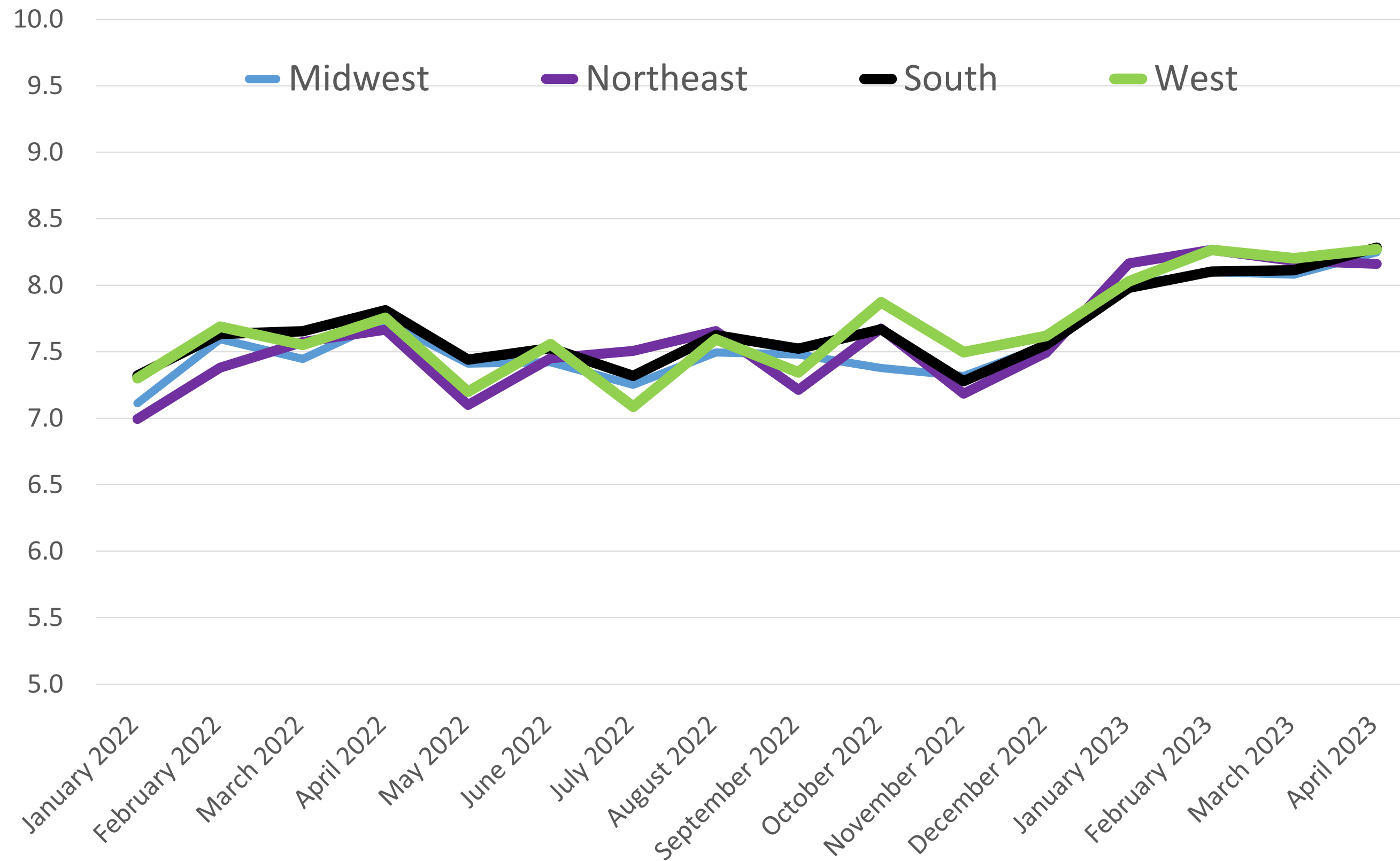
**Question:** Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



**Question:**

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

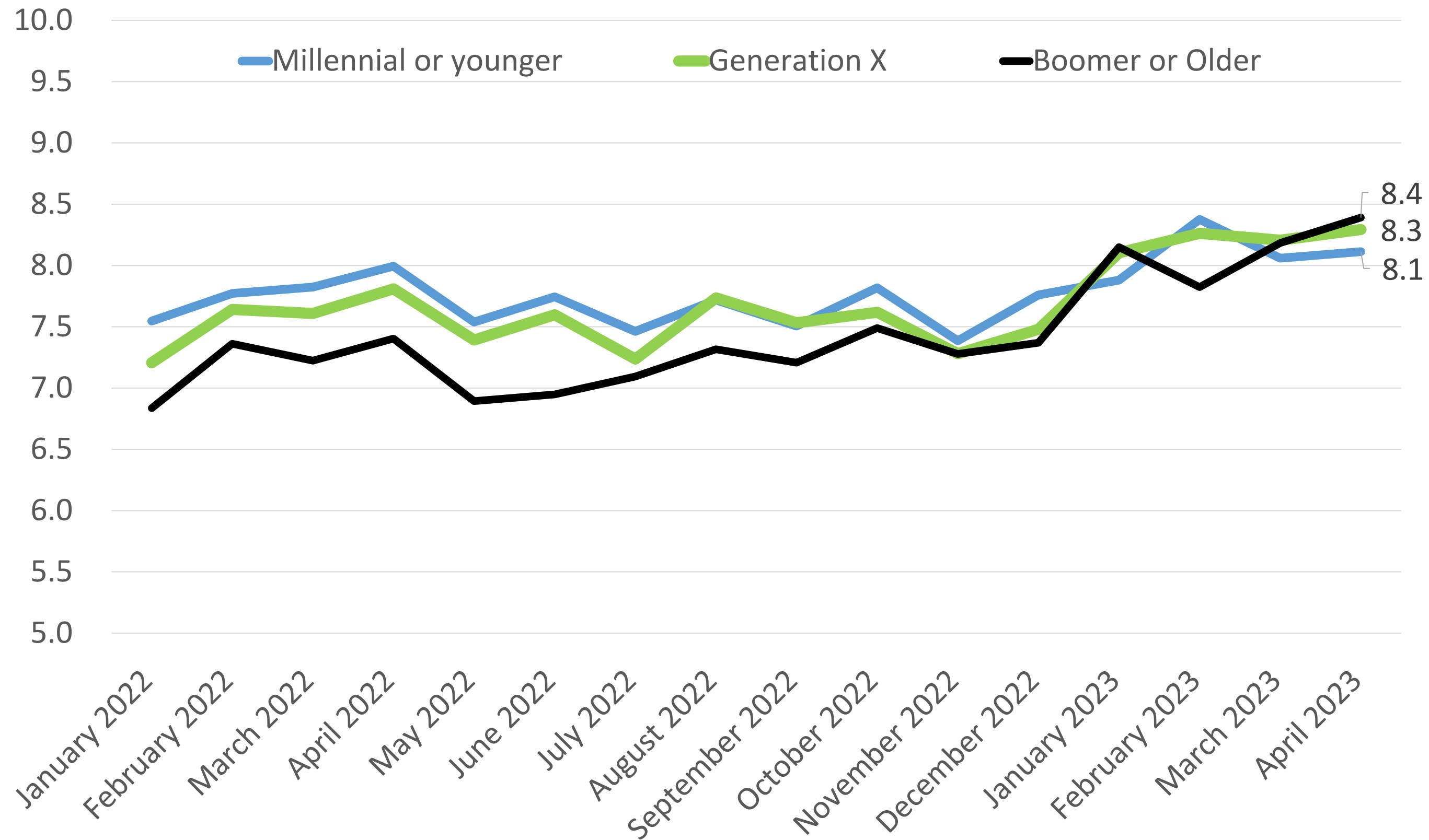
# Region



**Average score: 11-point scale**

**Across all regions,  
excitement for  
leisure travel is  
high.**

# Generation

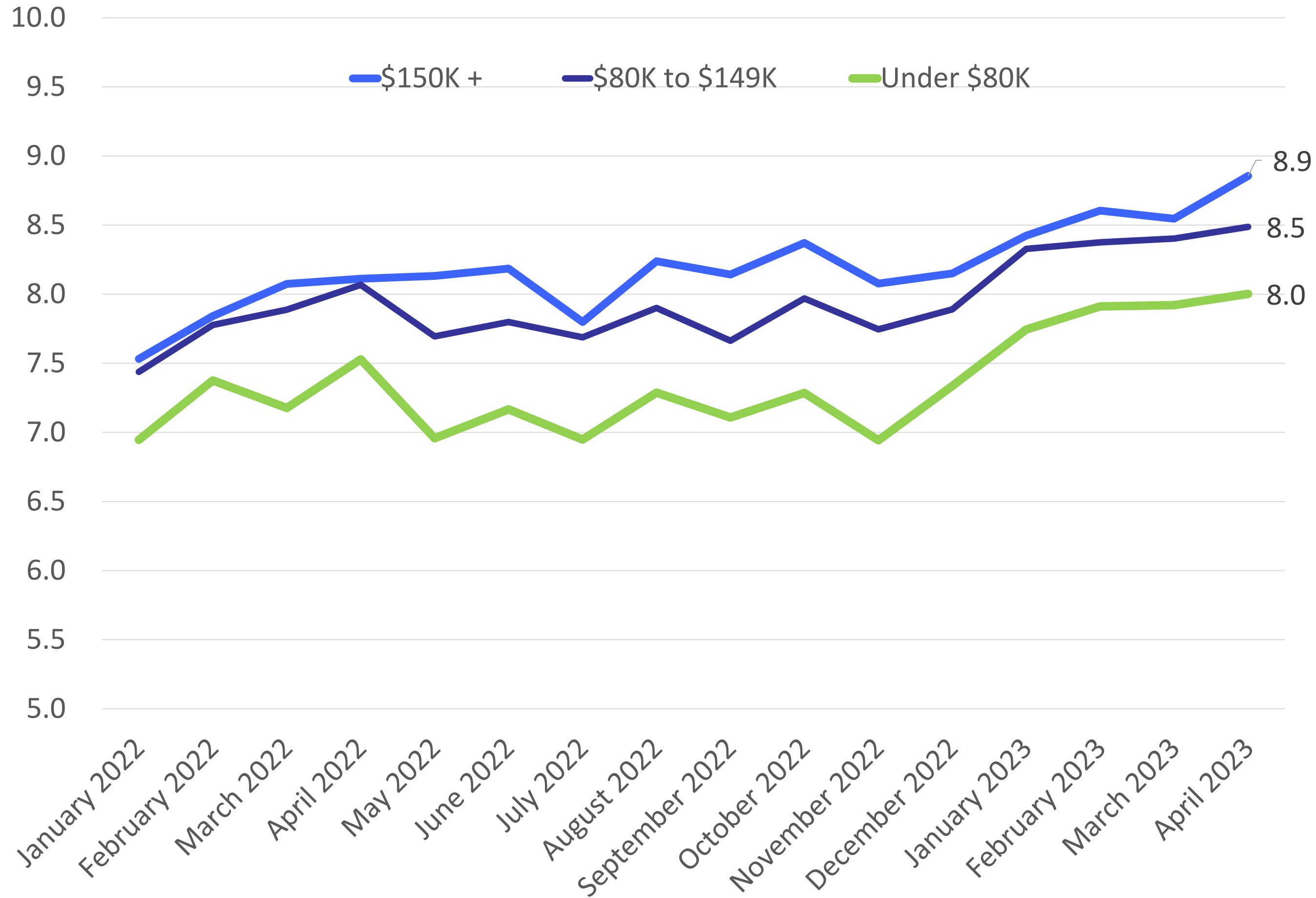


**Average score: 11-point scale**

**Return of the boomers!**

**Older travelers have roared back.**

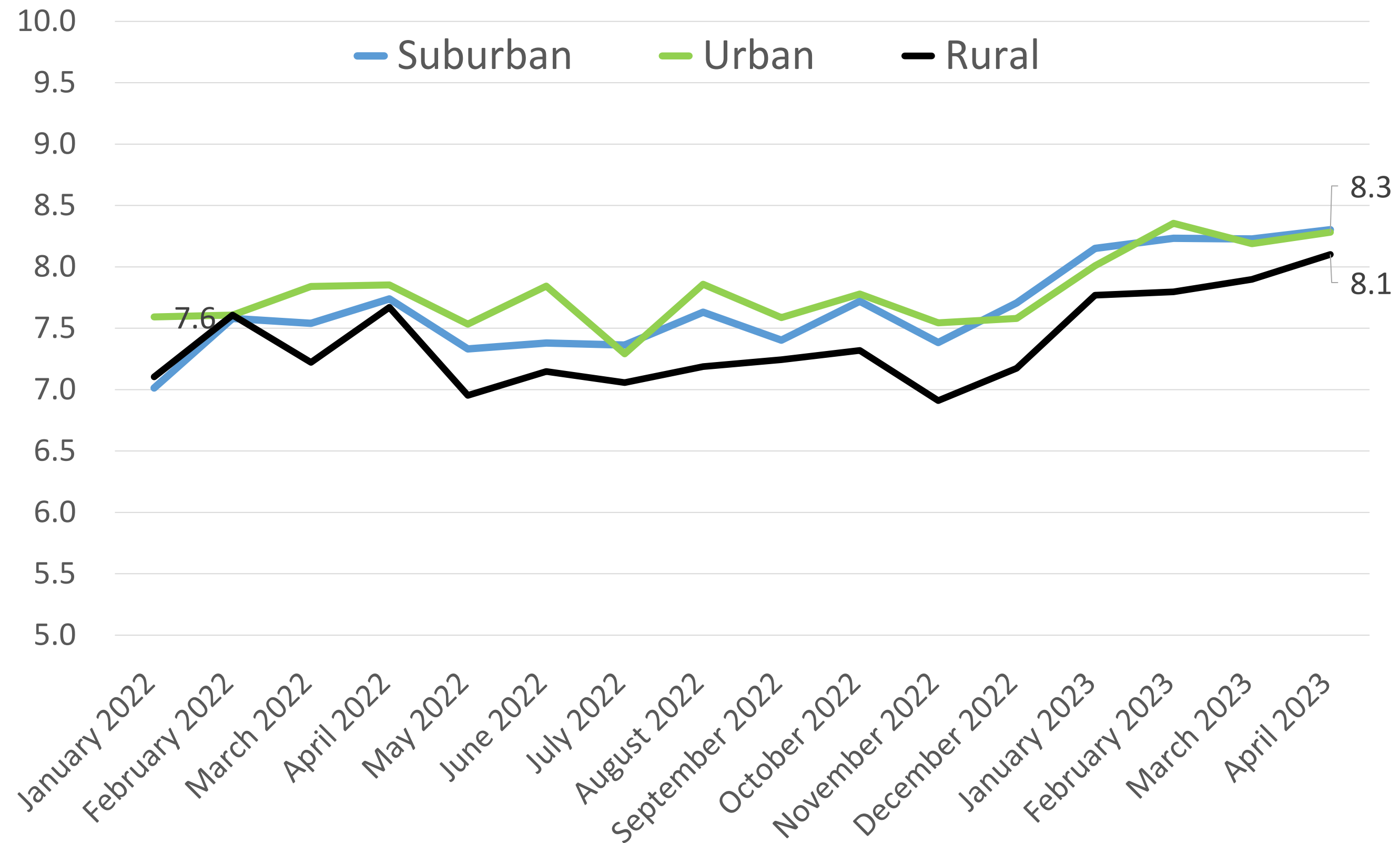
# Annual Household Income



Average score: 11-point scale

**Affluent households are significantly more excited about travel in the next year.**

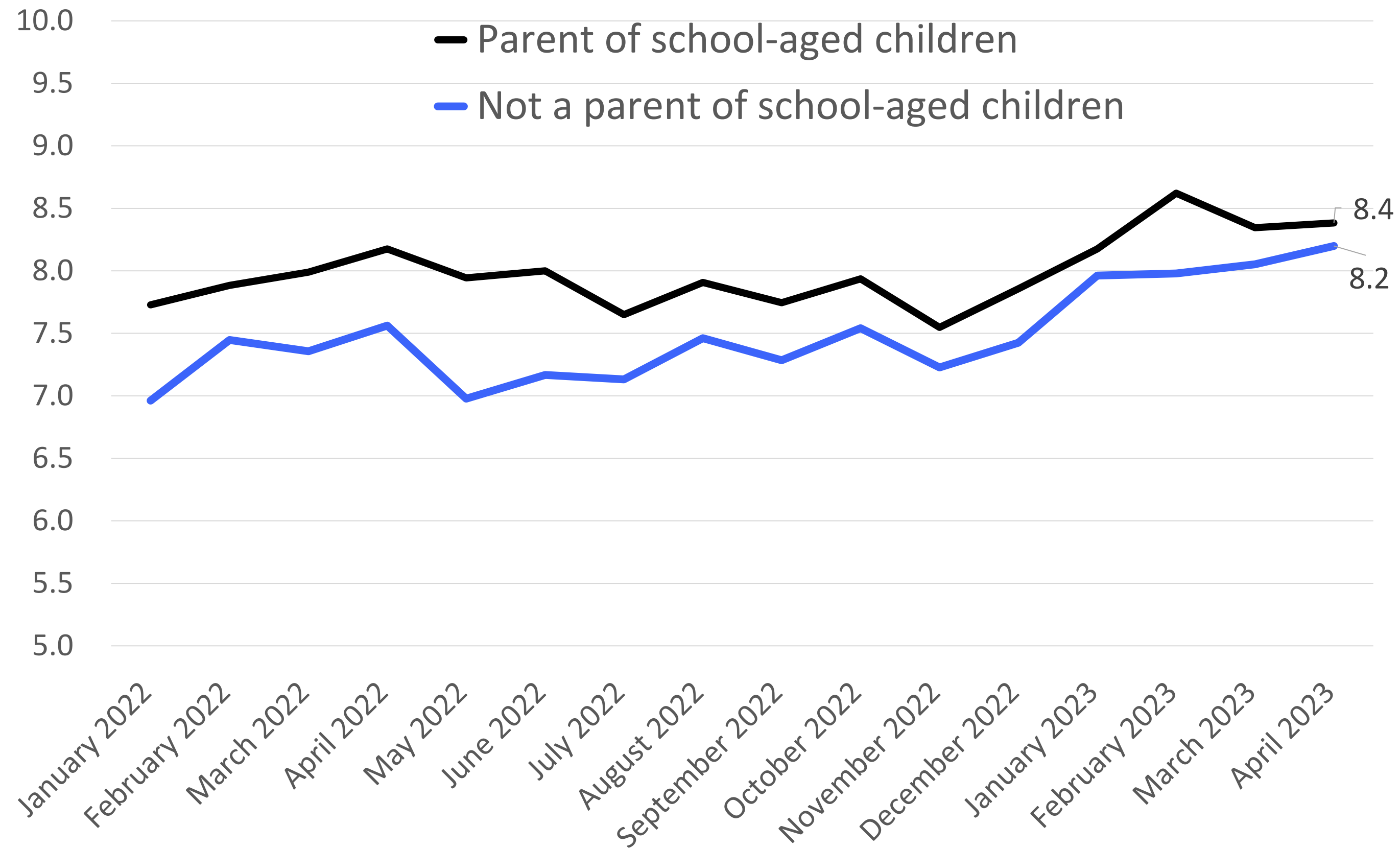
# Place of Residence



**Average score: 11-point scale**

**Residents of rural areas continue to lag in travel enthusiasm.**

# Parental Status



**Average score: 11-point scale**

**Have Kids. Will Travel.**

Excitement is high among family travelers.



# TRAVEL SENTIMENT INDICES

A tool to better understand the big picture by bringing all these data points together.

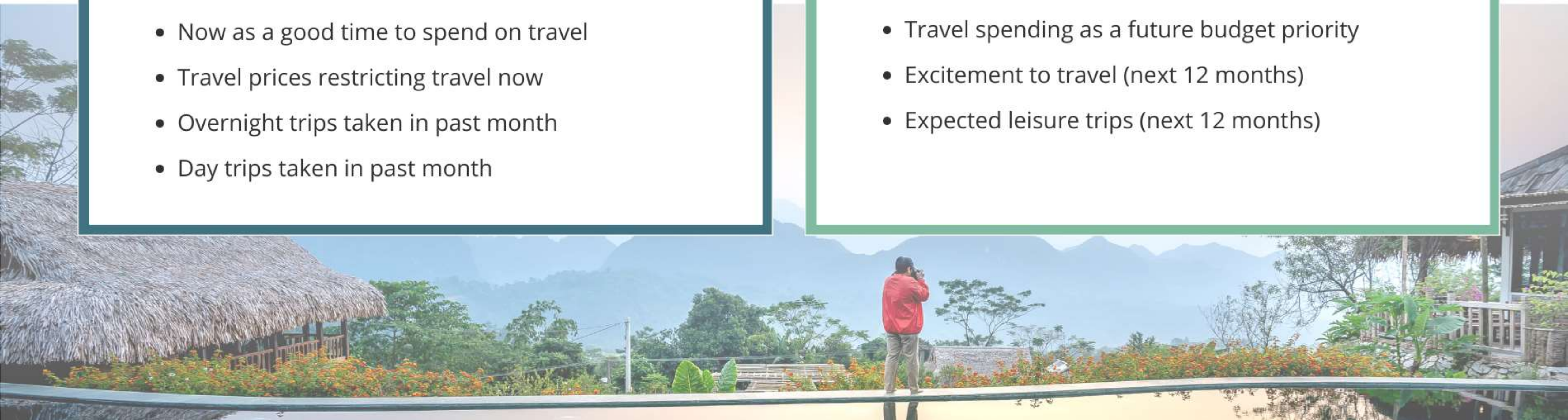
Index values are calculated by combining key questions.

## Current Travel Sentiment Index:

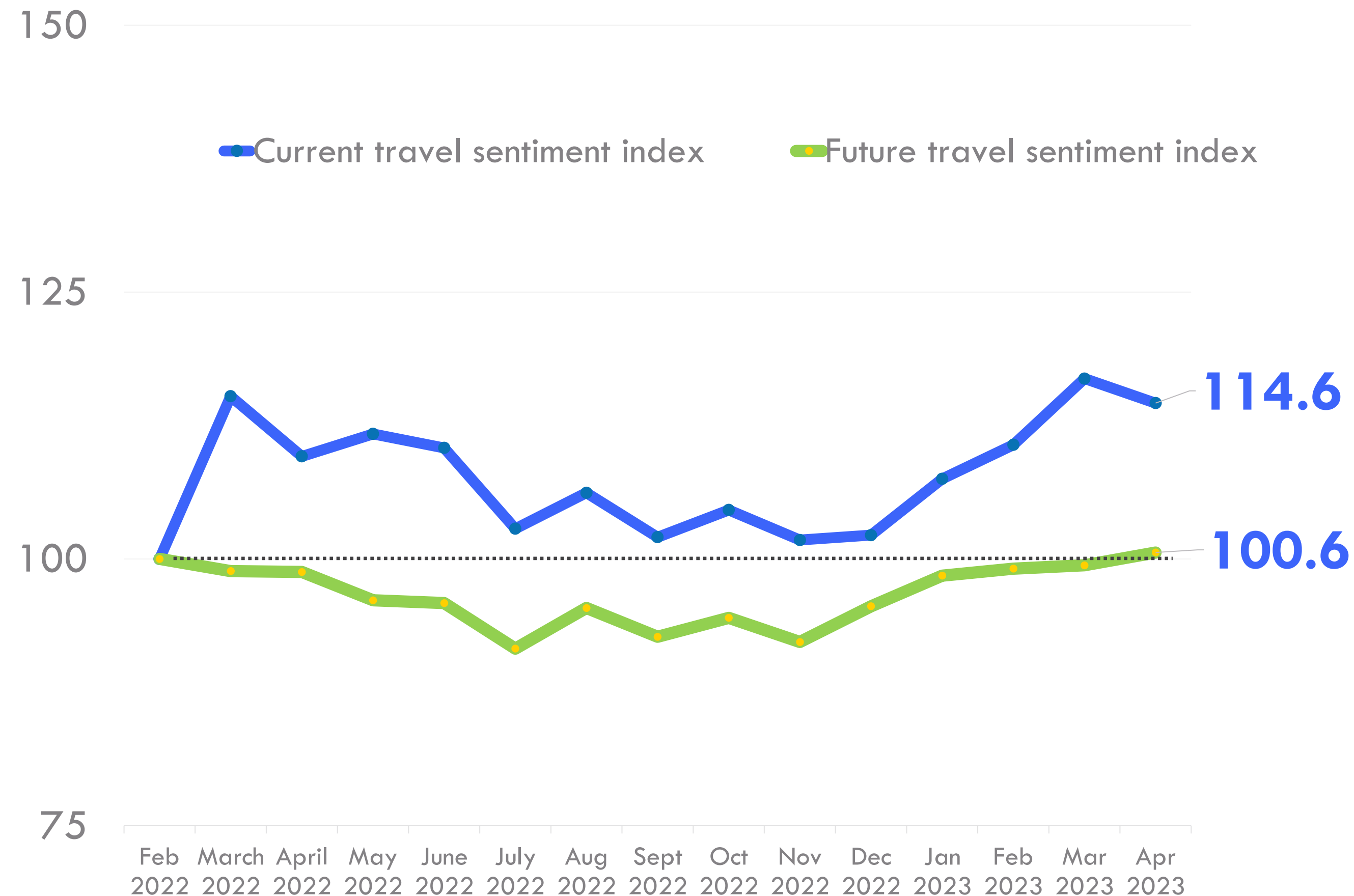
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

## Future Travel Sentiment Index:

- Personal financial outlook (next 12 months)
- Travel spending as a future budget priority
- Excitement to travel (next 12 months)
- Expected leisure trips (next 12 months)



# Travel Sentiment Indices:

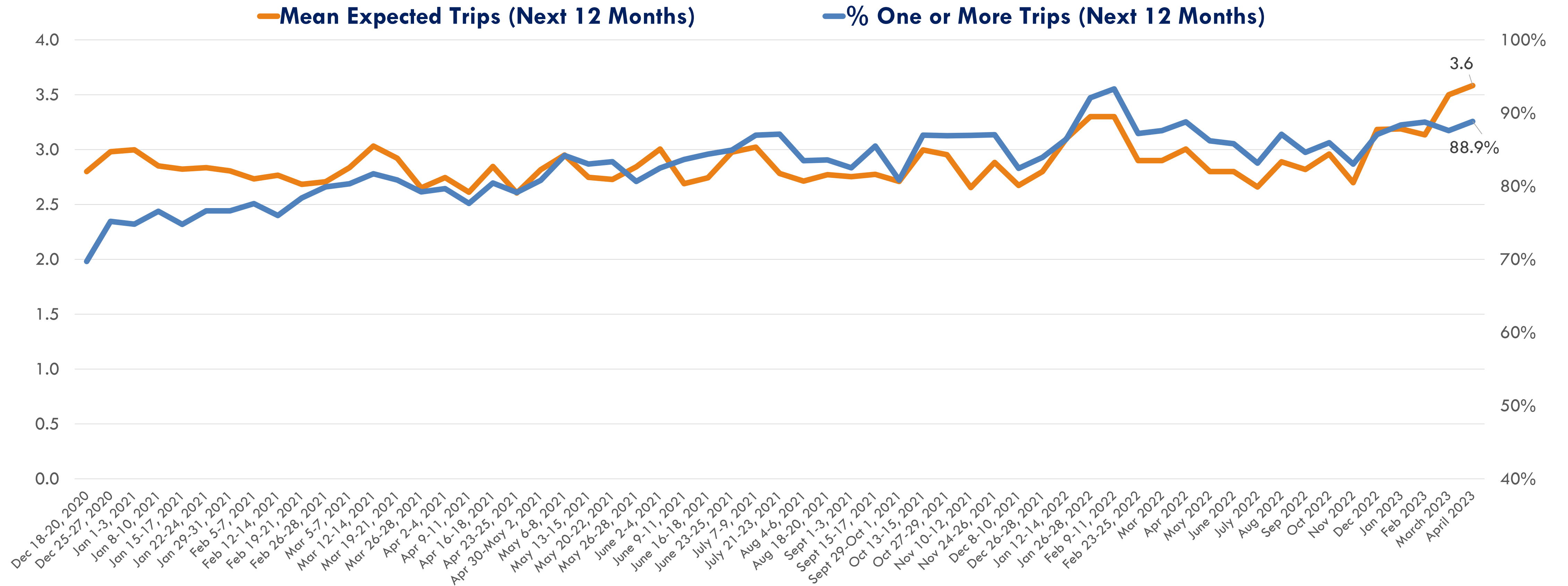


Note: These indices measure change in sentiment relative to Feb 2022.

- After a period of steady growth, current travel sentiment has dipped somewhat this month
- Future travel sentiment is up slightly from one year ago.

# NUMBER OF LEISURE TRIPS ANTICIPATED IN THE NEXT 12 MONTHS

**Question:** IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the **NEXT TWELVE (12) MONTHS?** (Select one)

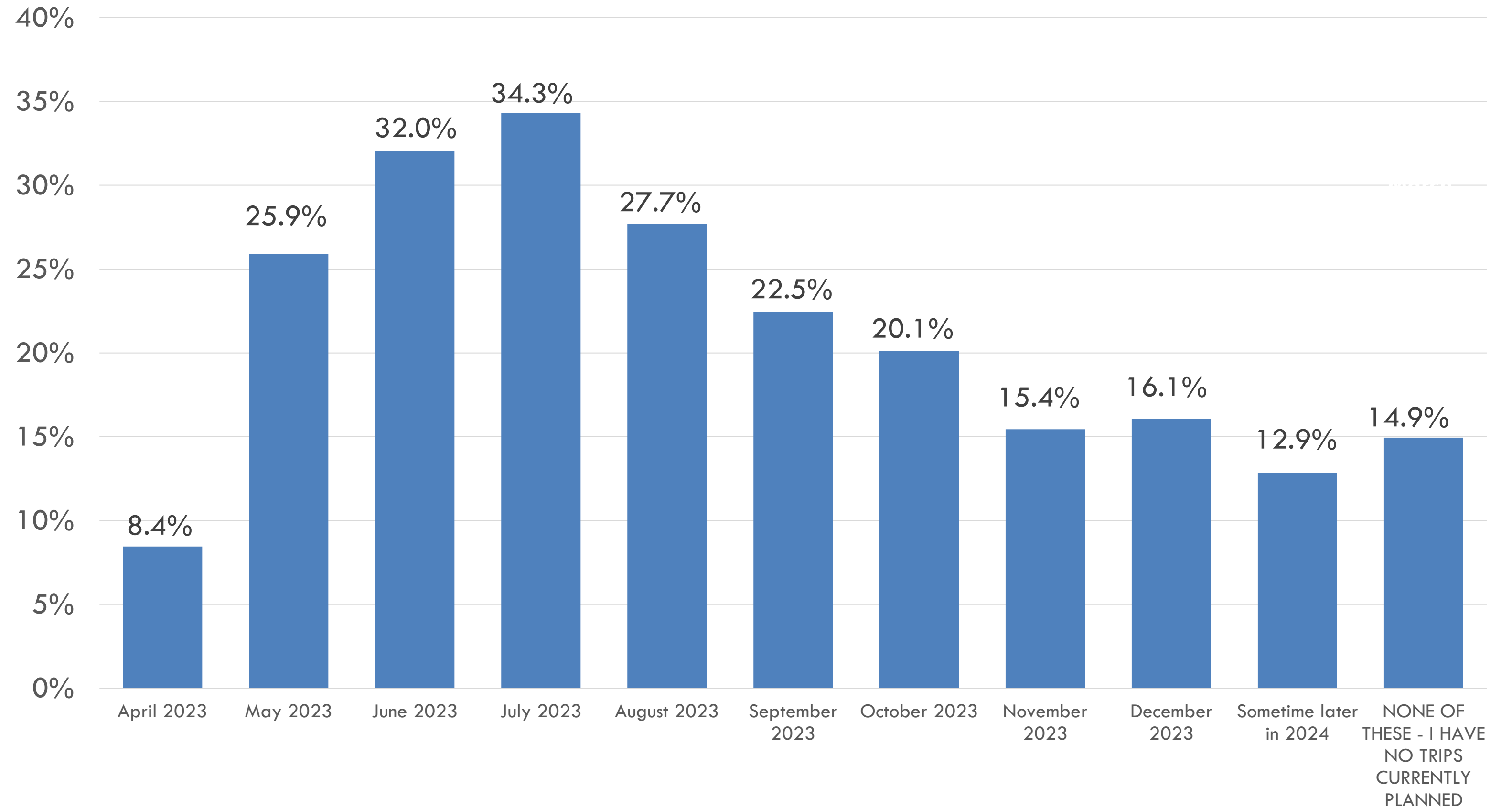


(Base: All respondents, 1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022 and 2023)

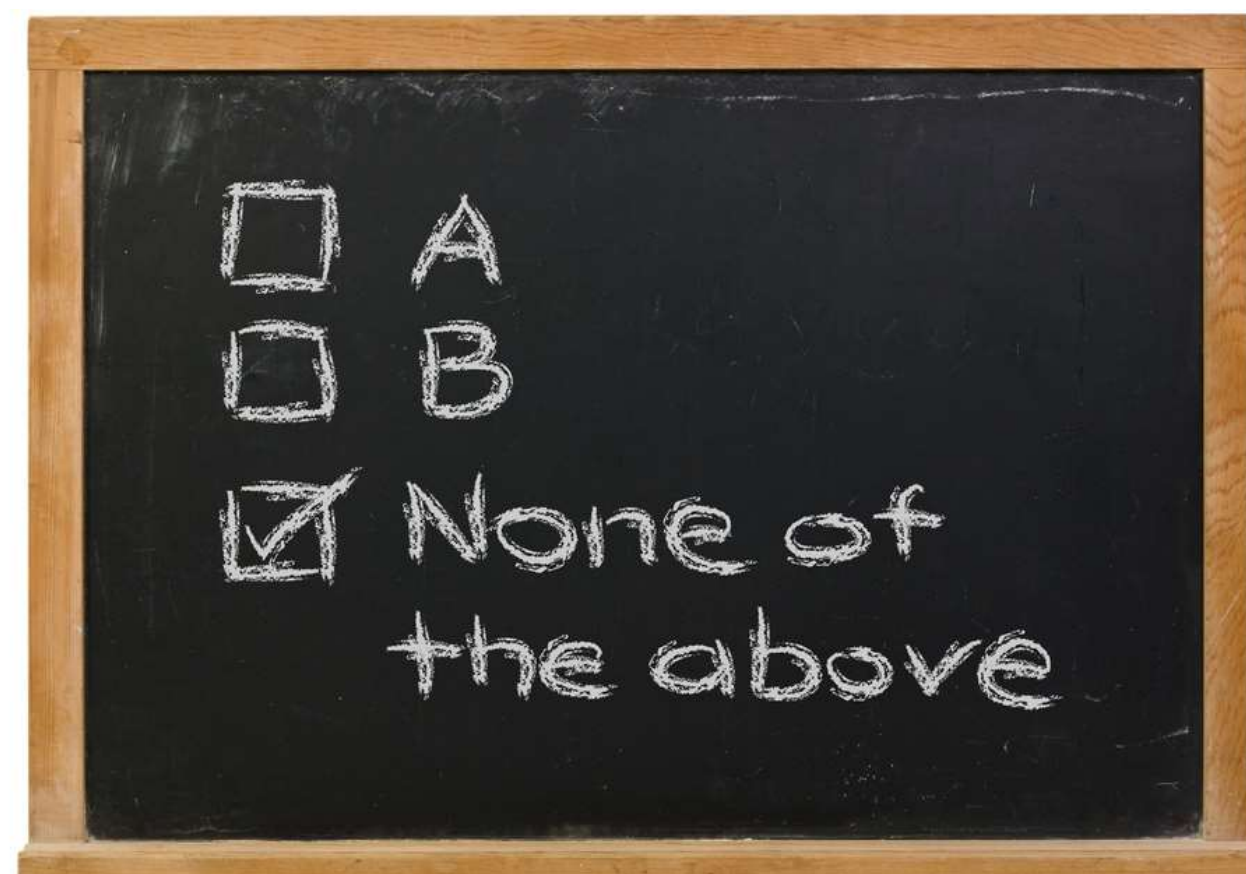
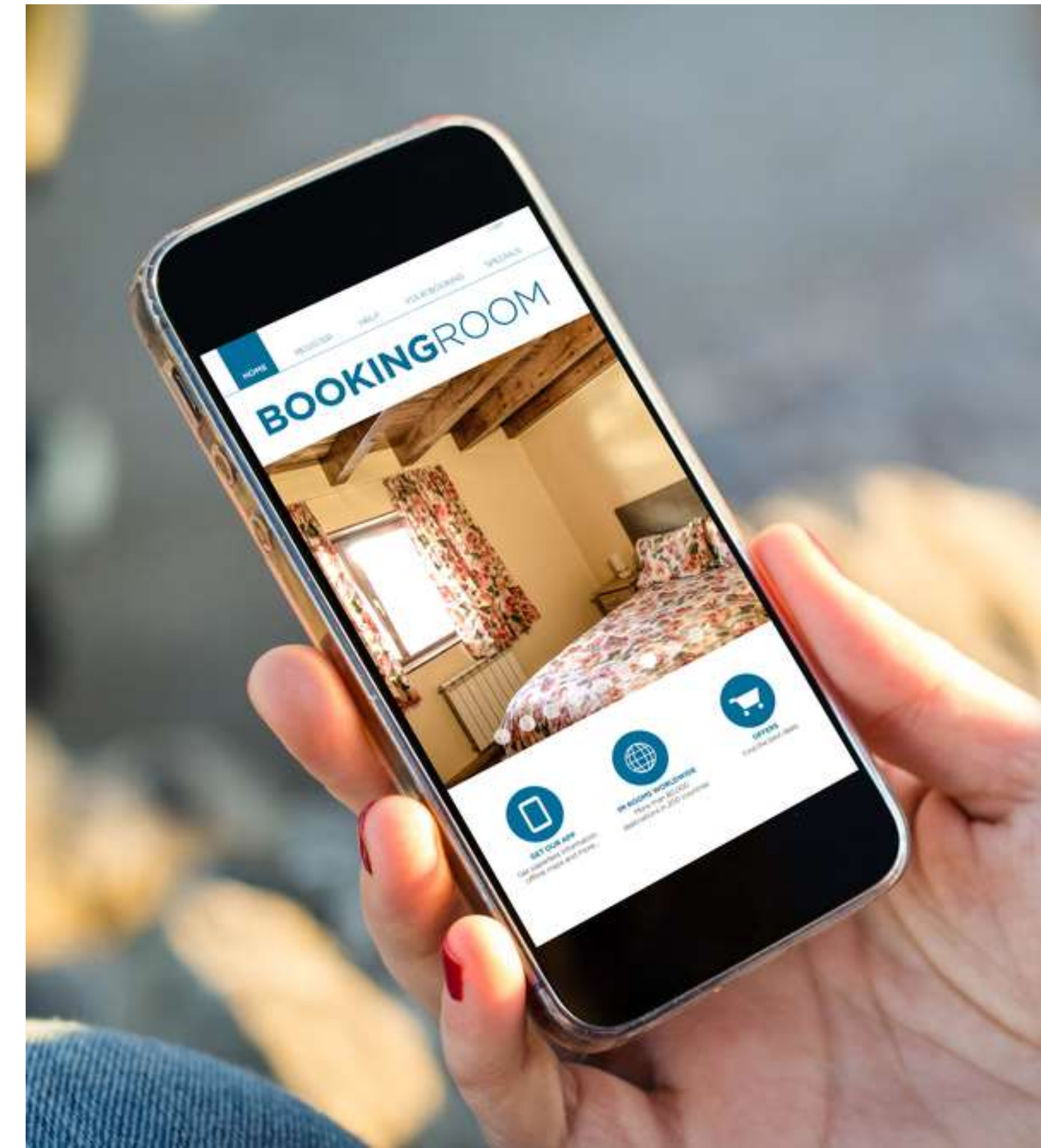
# MONTHS OF EXPECTED LEISURE TRIPS IN 2023

**Question:** In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)

(Base: All respondents, 4,023 completed surveys.  
Data collected April 16-21, 2023.)



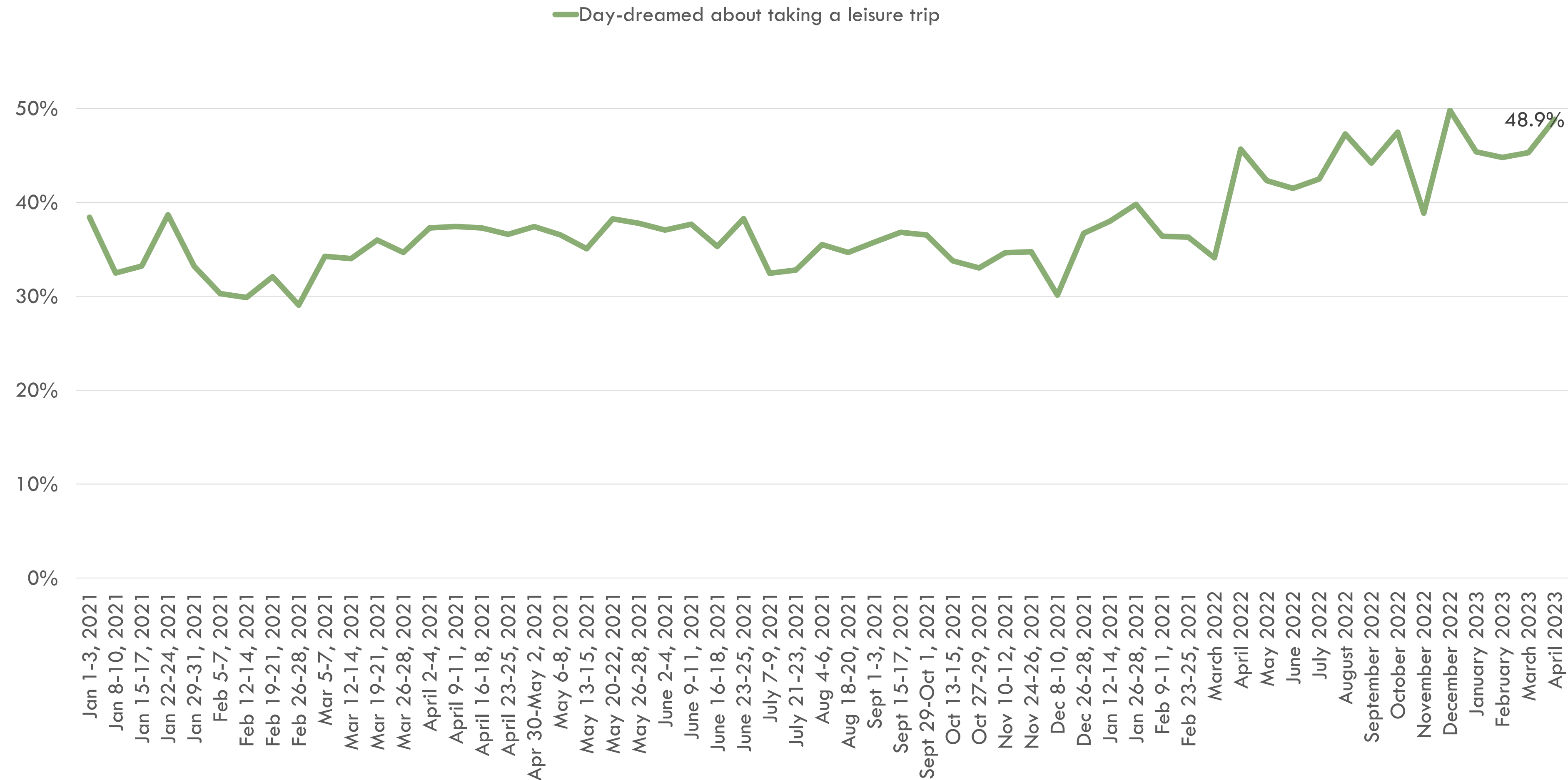
# Travel Planning Activities (Past Week)



# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have \_\_\_\_\_



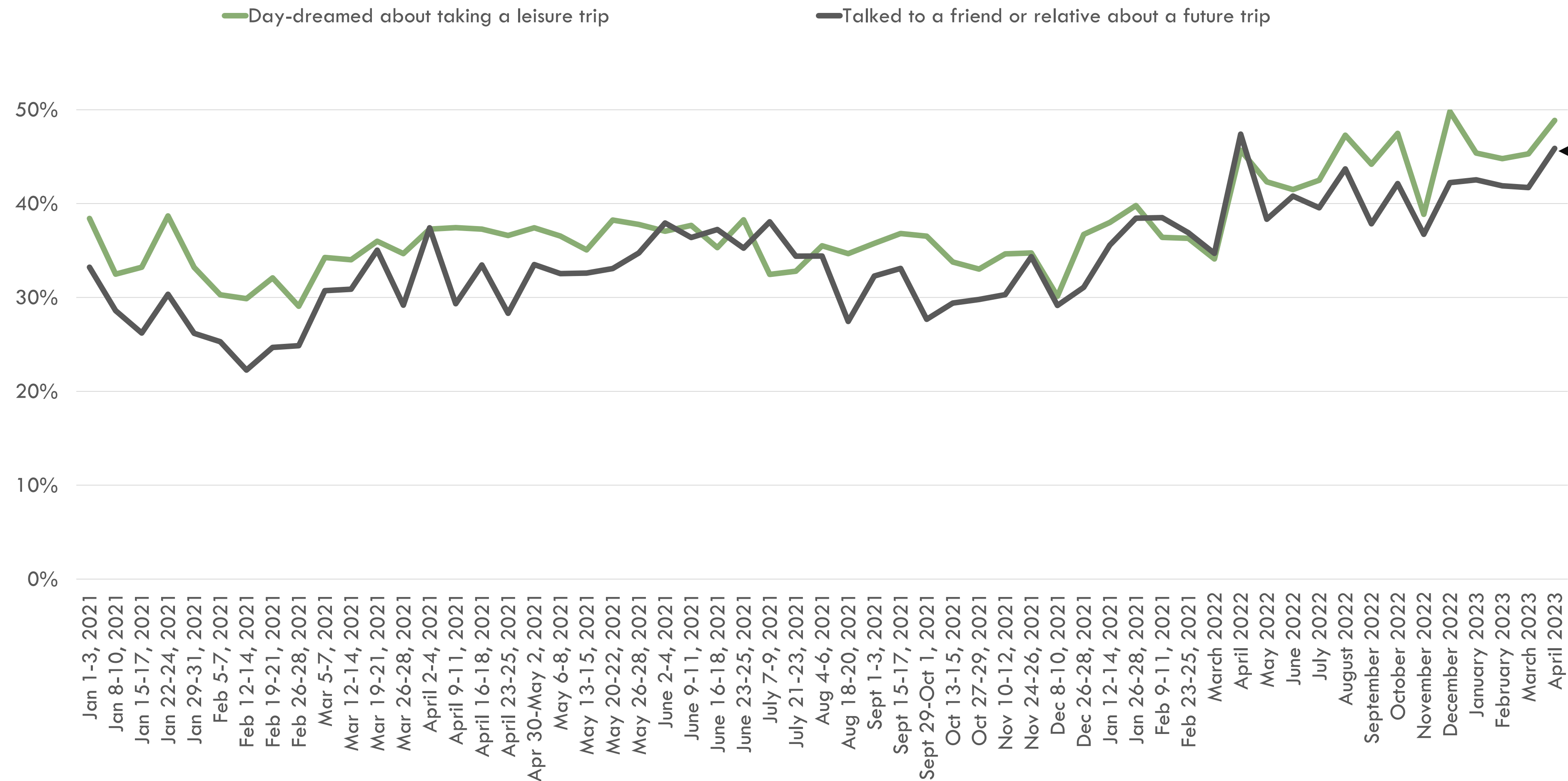
Day-dreamed about taking a leisure trip



# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have \_\_\_\_\_



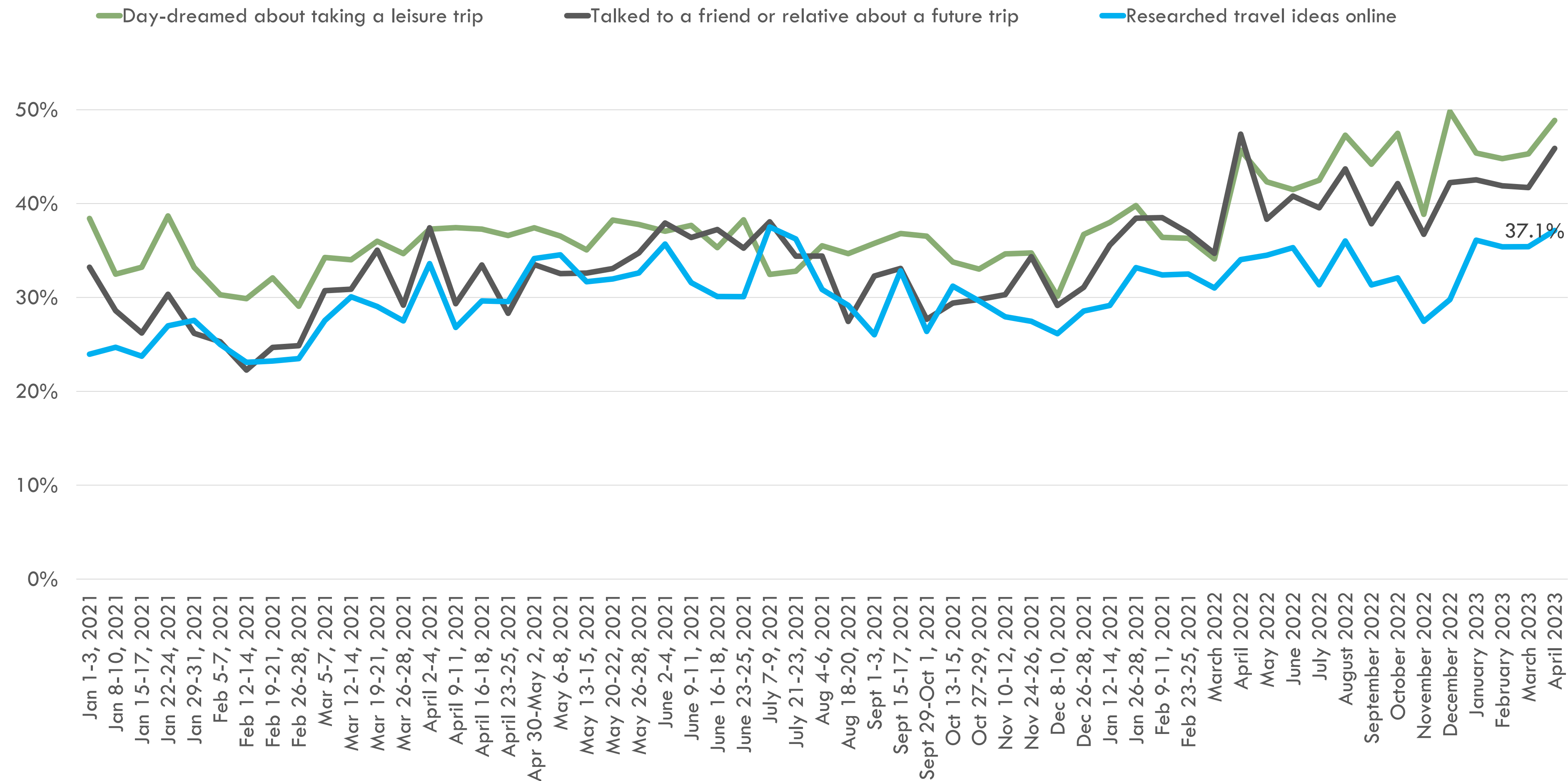
**Talked to a friend about a future trip**



# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have \_\_\_\_\_



**Researched Travel Ideas Online**

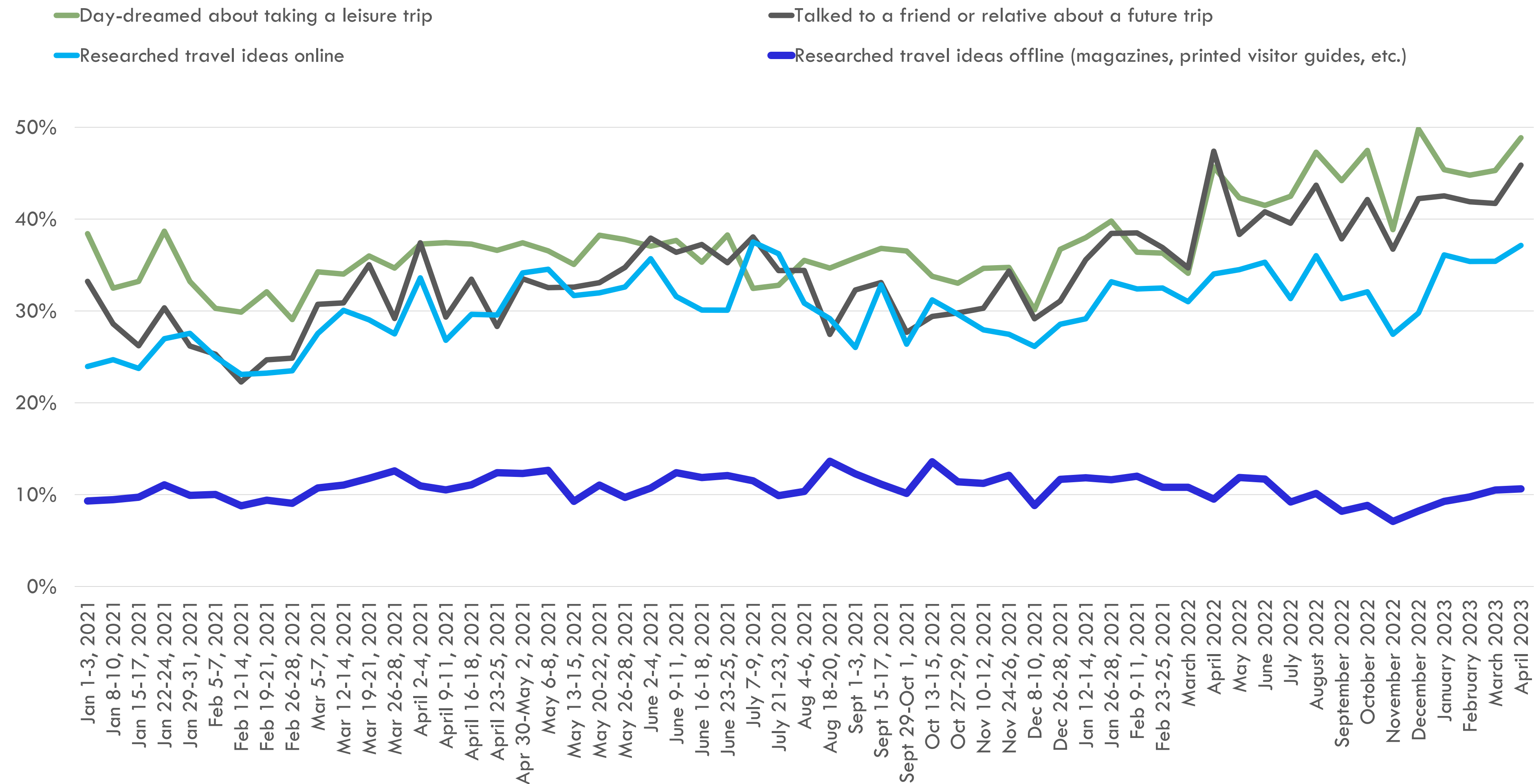




# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have \_\_\_\_\_



**Researched Travel Ideas Offline**

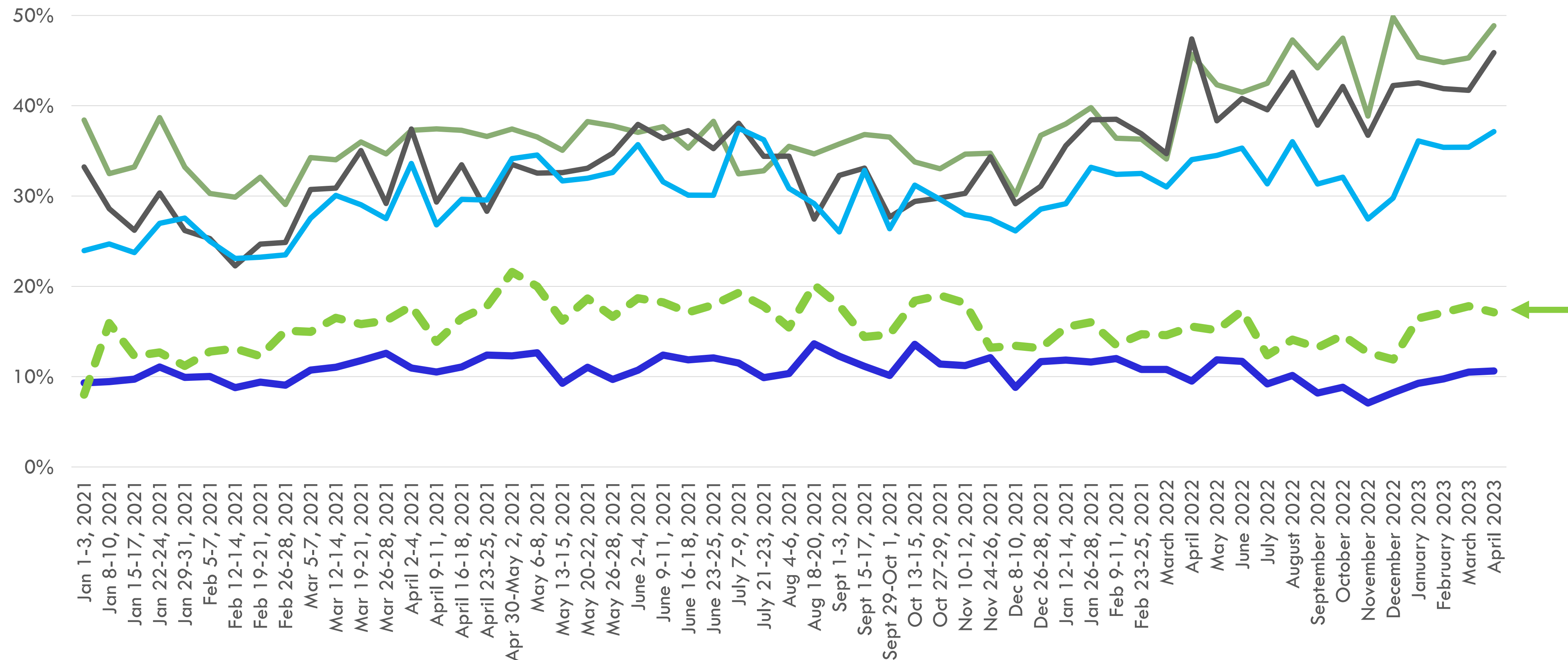


# TRAVEL PLANNING IN THE PAST WEEK

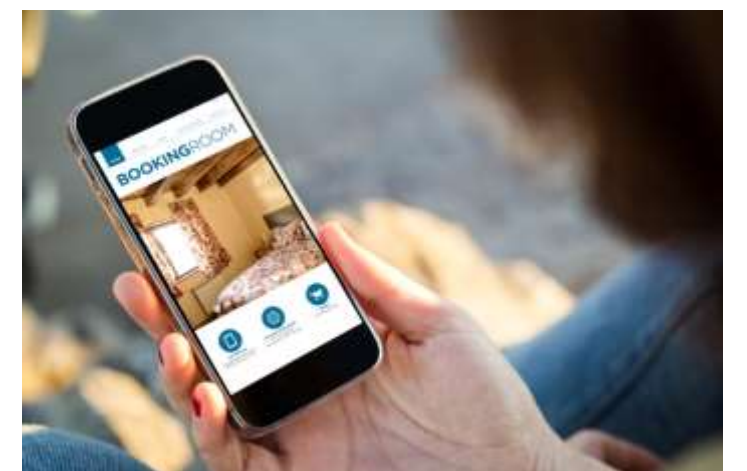
**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have \_\_\_\_\_

- Day-dreamed about taking a leisure trip
- Researched travel ideas online
- Researched travel ideas offline (magazines, printed visitor guides, etc.)
- Made travel reservations (lodging, transportation, tickets, etc.)
- Talked to a friend or relative about a future trip



Made Travel Reservations

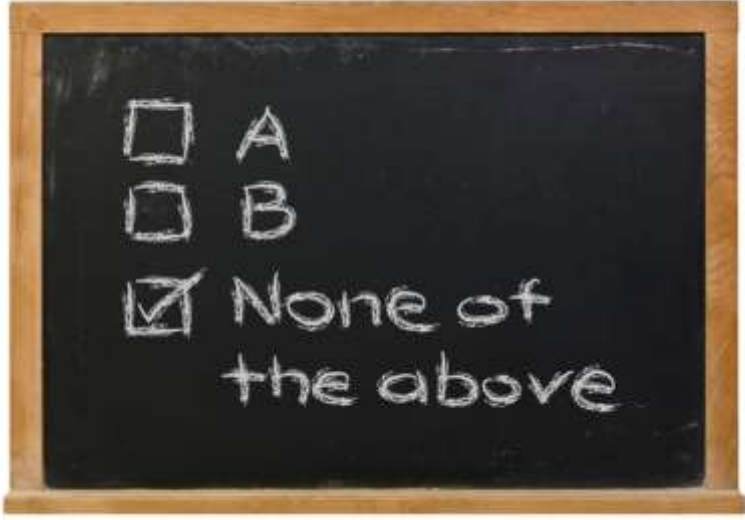
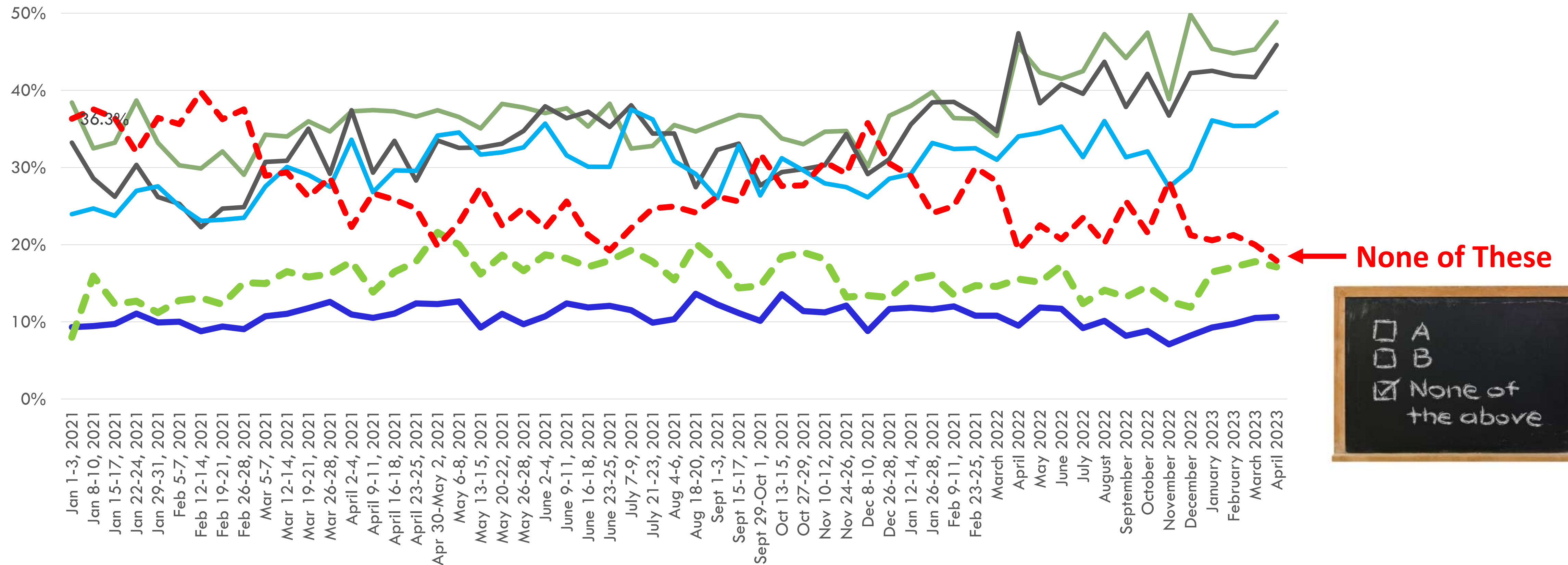


# TRAVEL PLANNING IN THE PAST WEEK

**Question:** In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

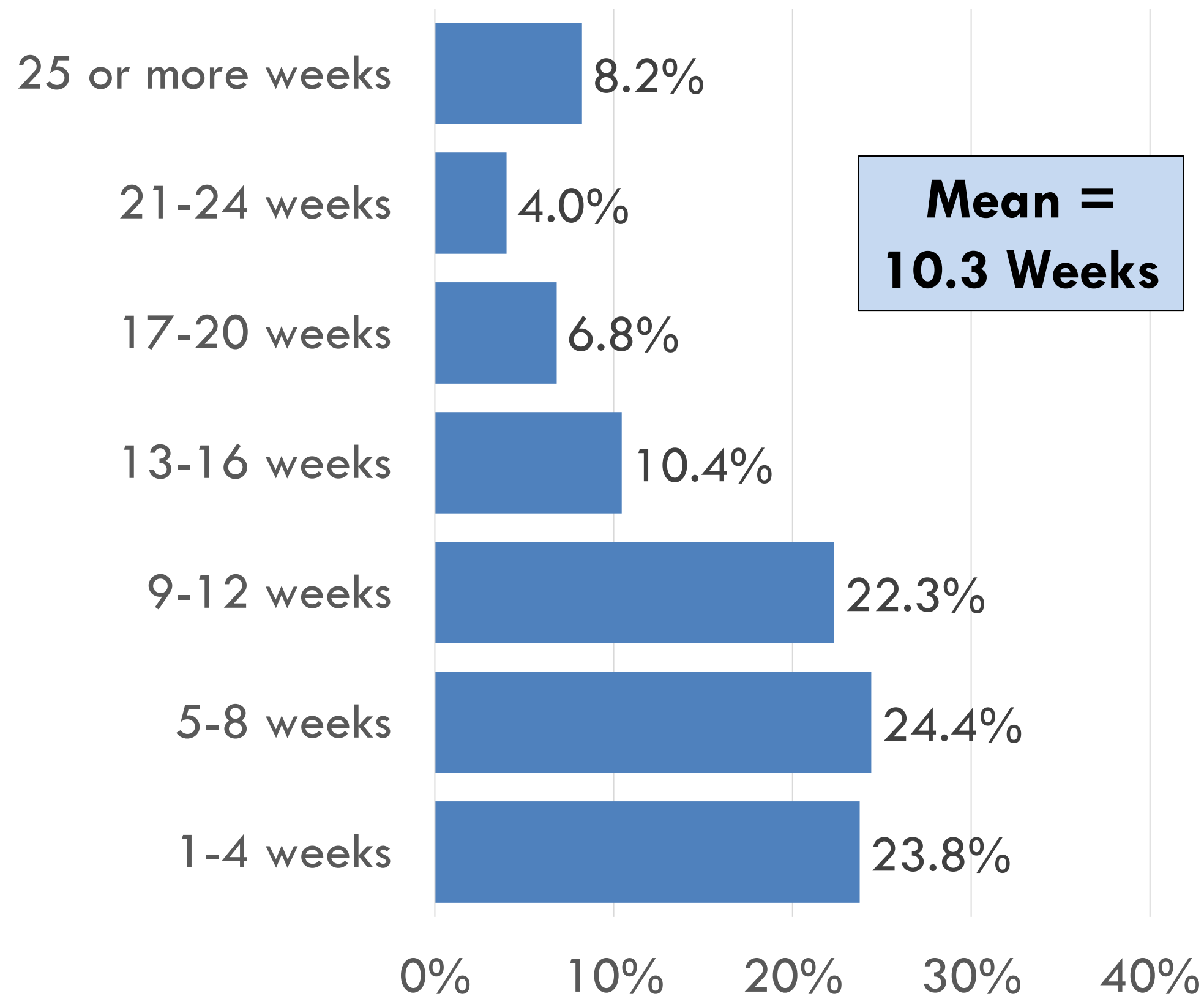
In the PAST WEEK I have \_\_\_\_\_

- Day-dreamed about taking a leisure trip
- Researched travel ideas online
- Made travel reservations (lodging, transportation, tickets, etc.)
- Talked to a friend or relative about a future trip
- Researched travel ideas offline (magazines, printed visitor guides, etc.)
- - - NONE OF THESE

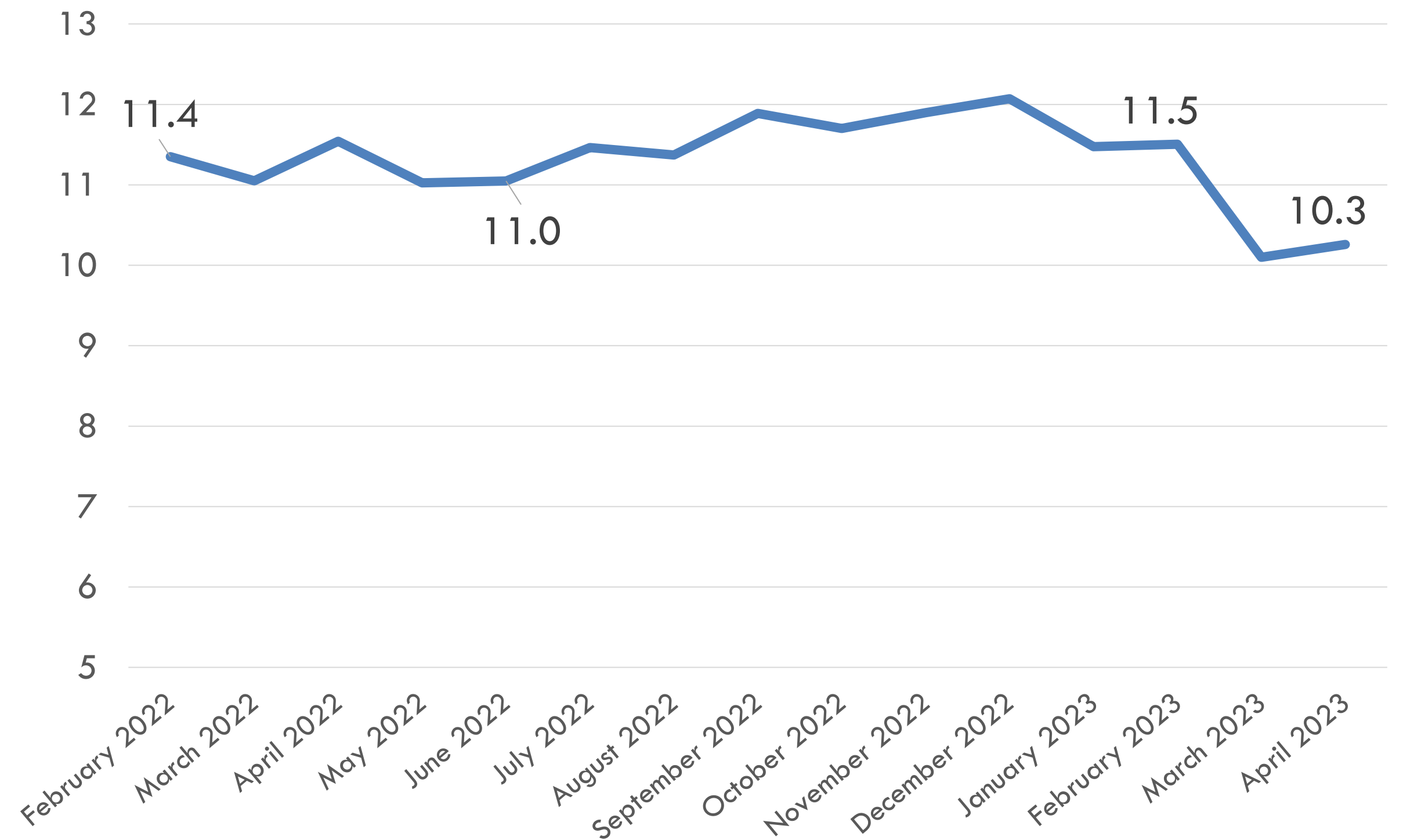


# PLANNING WINDOW FOR DOMESTIC LEISURE TRAVEL

**Question:** How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



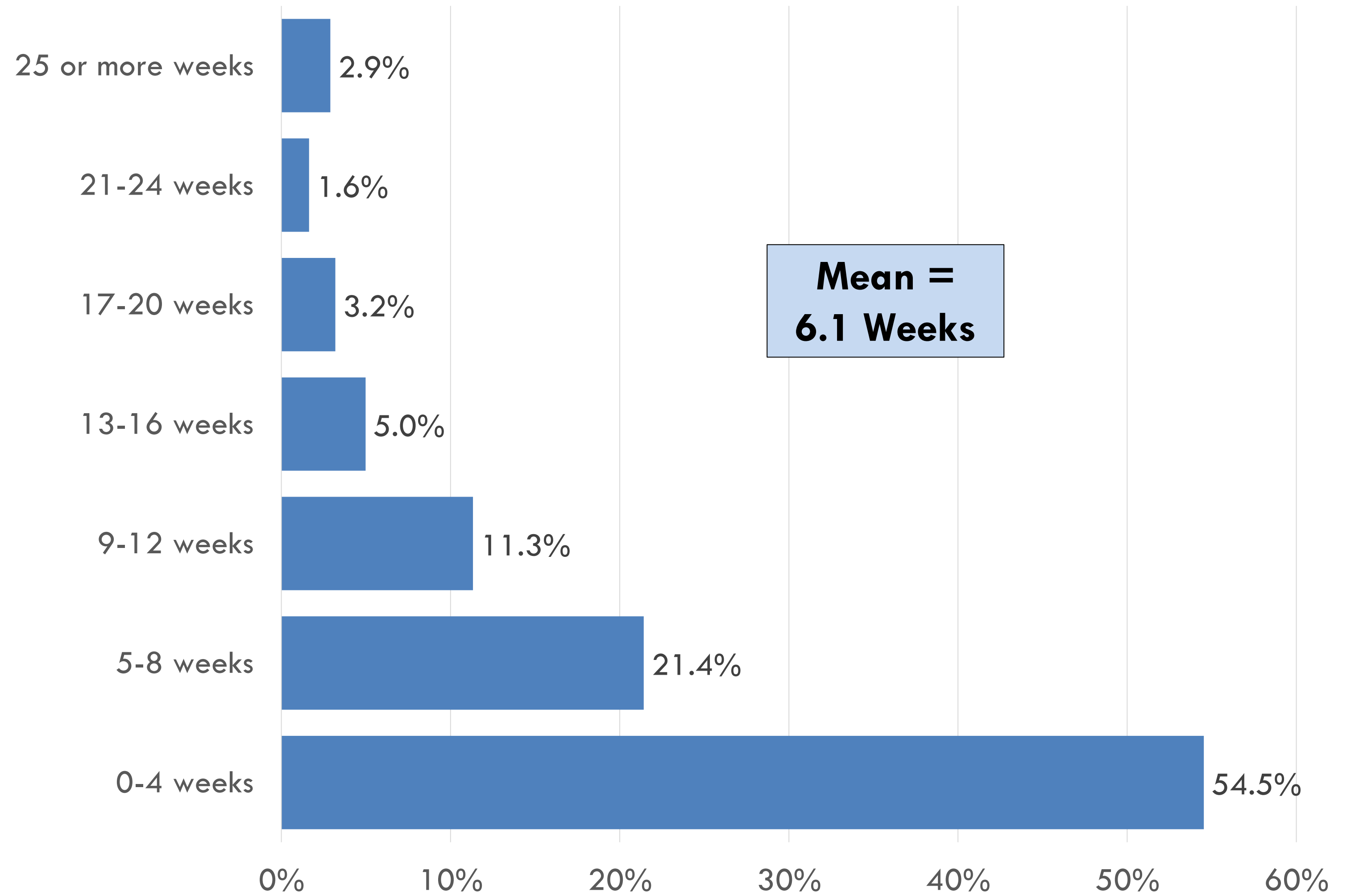
*Historical data* **Mean in Weeks**



# OVERNIGHT TRIPS: PLANNING WINDOW

**Question: How many weeks IN ADVANCE did you begin planning your most recent overnight trip?**

*(Base: All respondents, 2,340 completed surveys. Data collected April 16-21, 2023.)*





# American Travelers' Predictions for 2023

% SHOWN ARE THOSE THAT SAY HIGH LIKELIHOOD/CERTAINTY

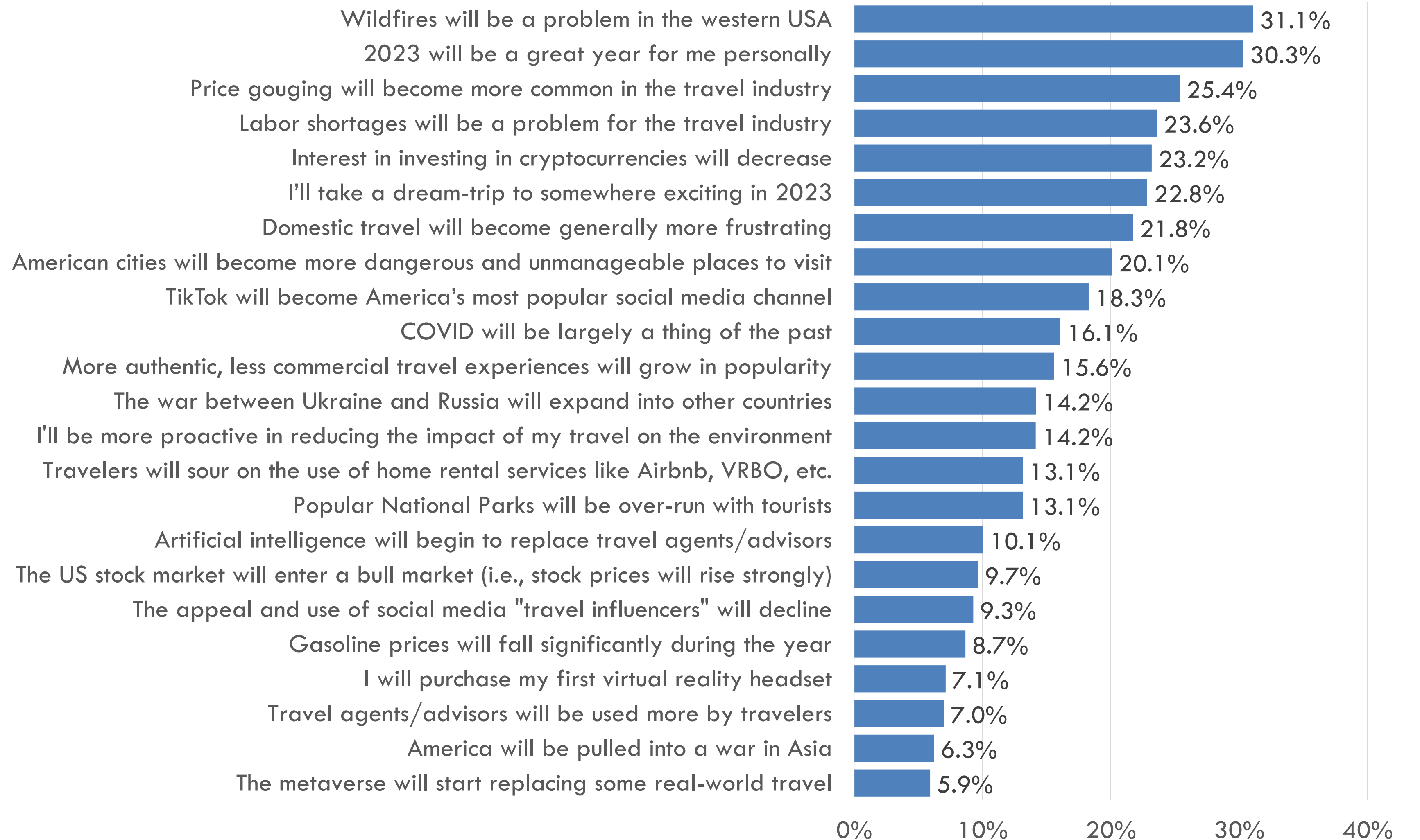


# 2023 OUTLOOK

**Question:** Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be? (Please use the scale below to give us your best guess for each)

*(Base: All respondents, 4,017 completed surveys. Data collected December 15-24, 2022.)*

## % Certain or Extremely Likely





**LAST MONTH**

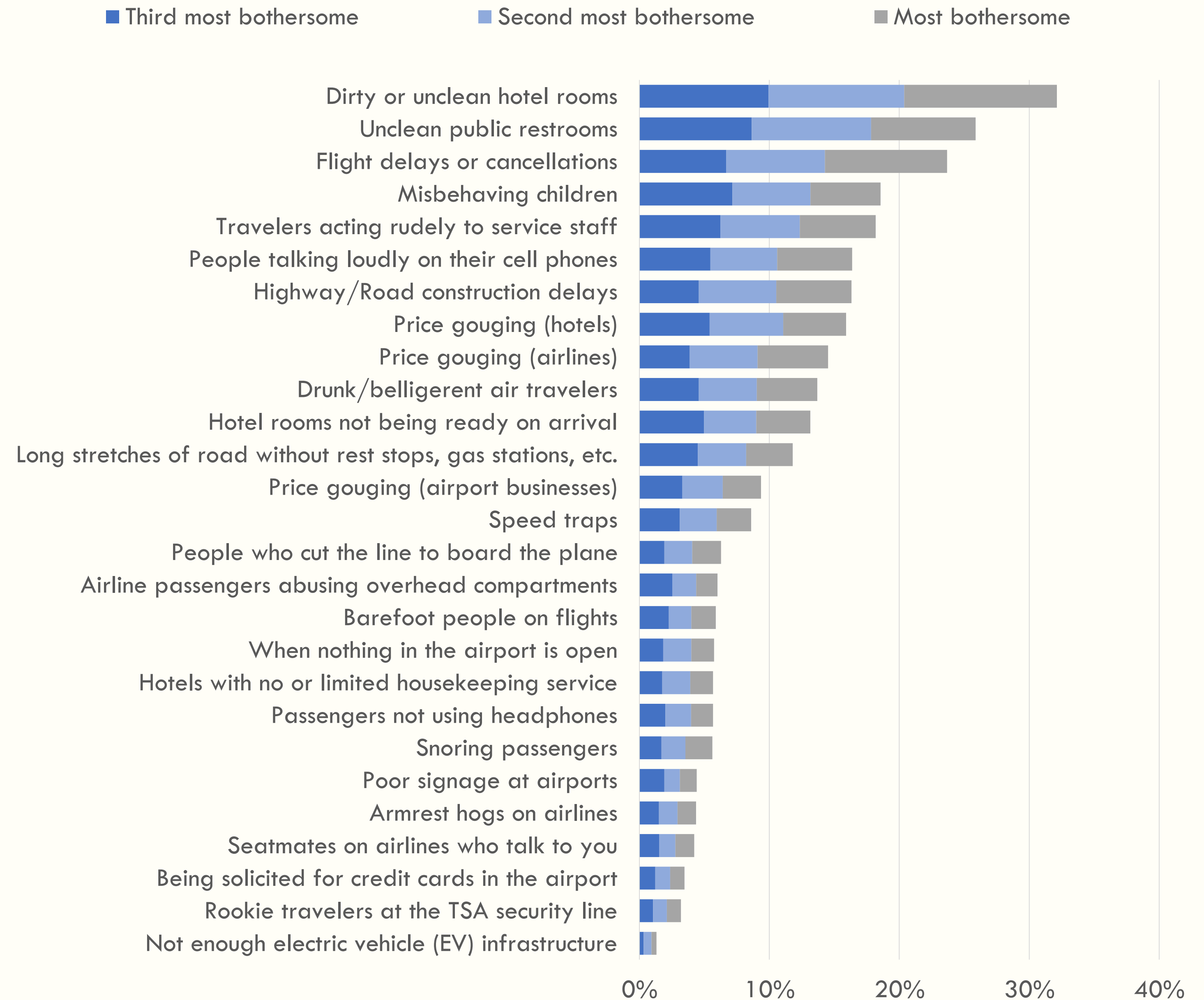
**American Travelers' Pet Peeves**



## Question:

What are your travel pet peeves?

Please select those you find most bothersome. (Click and drag as many as 3)



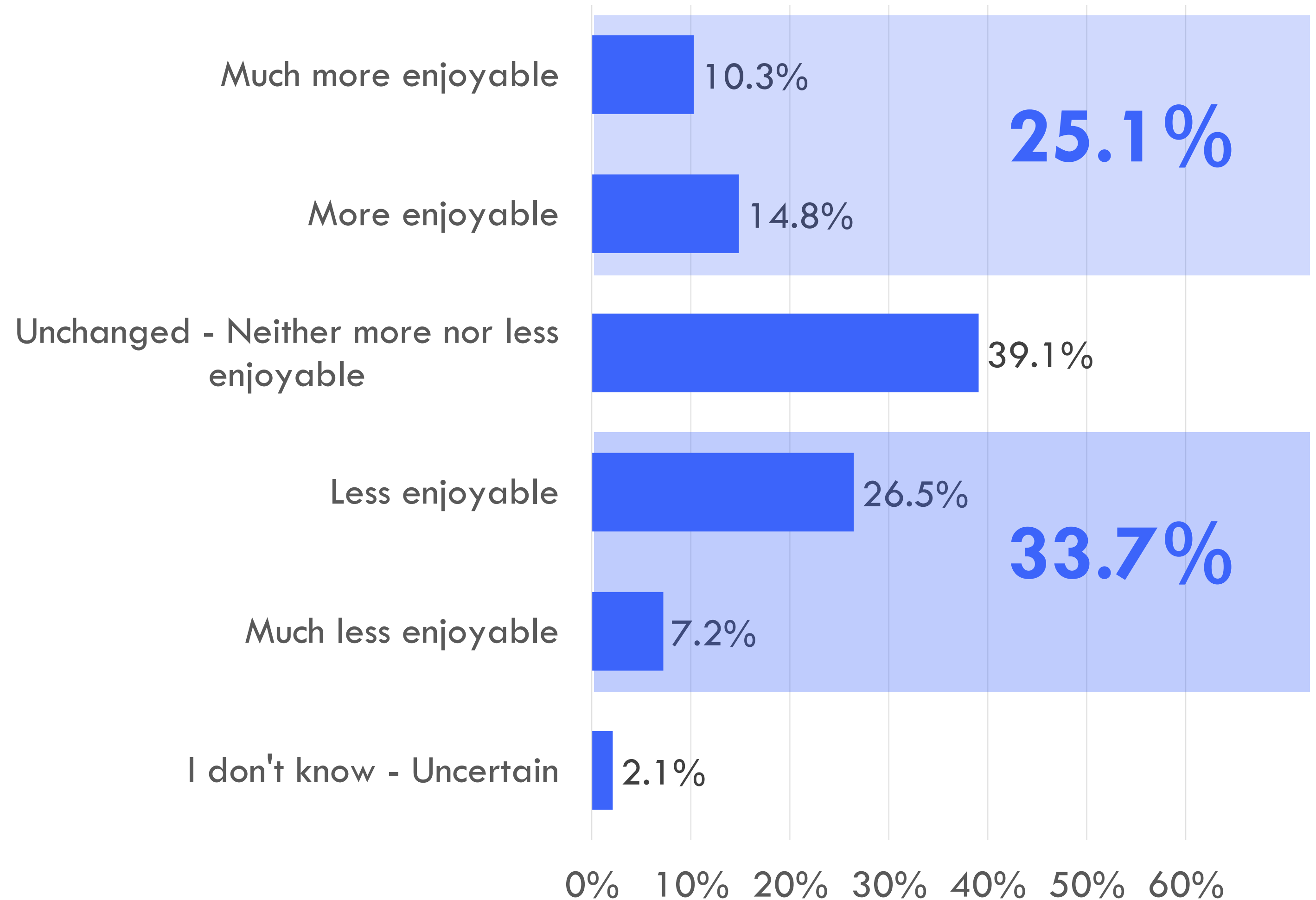
(Base: All respondents, 4,057 completed surveys. Data collected March 15-22, 2023.)



Please think back to the period immediately before the COVID-19 pandemic and compare that time to today.

## Question:

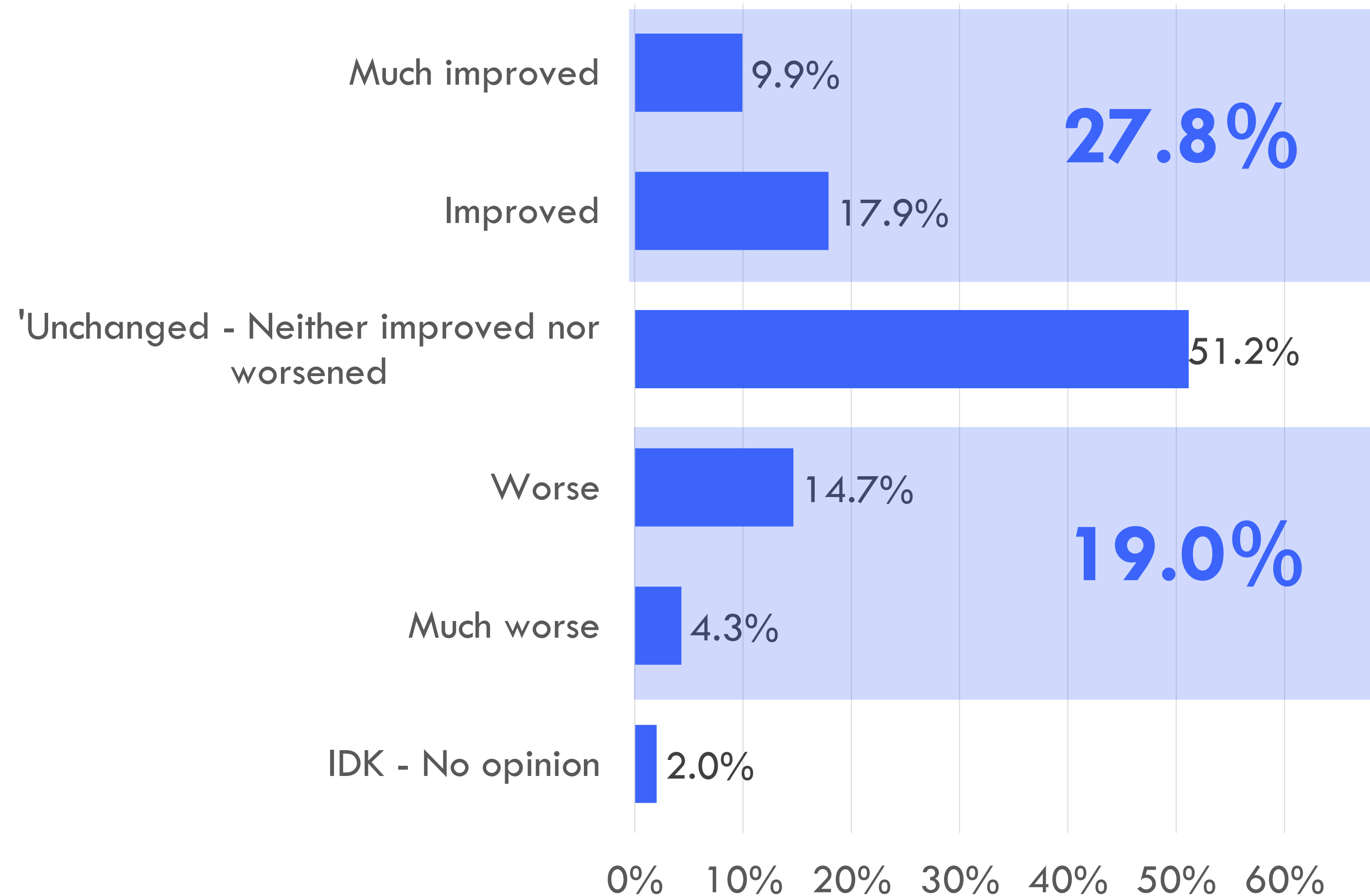
Compared to immediately before the COVID-19 pandemic, do you feel traveling has become more enjoyable, less enjoyable or is unchanged?





Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

# My Ability to Have Fun and Enjoy Travel



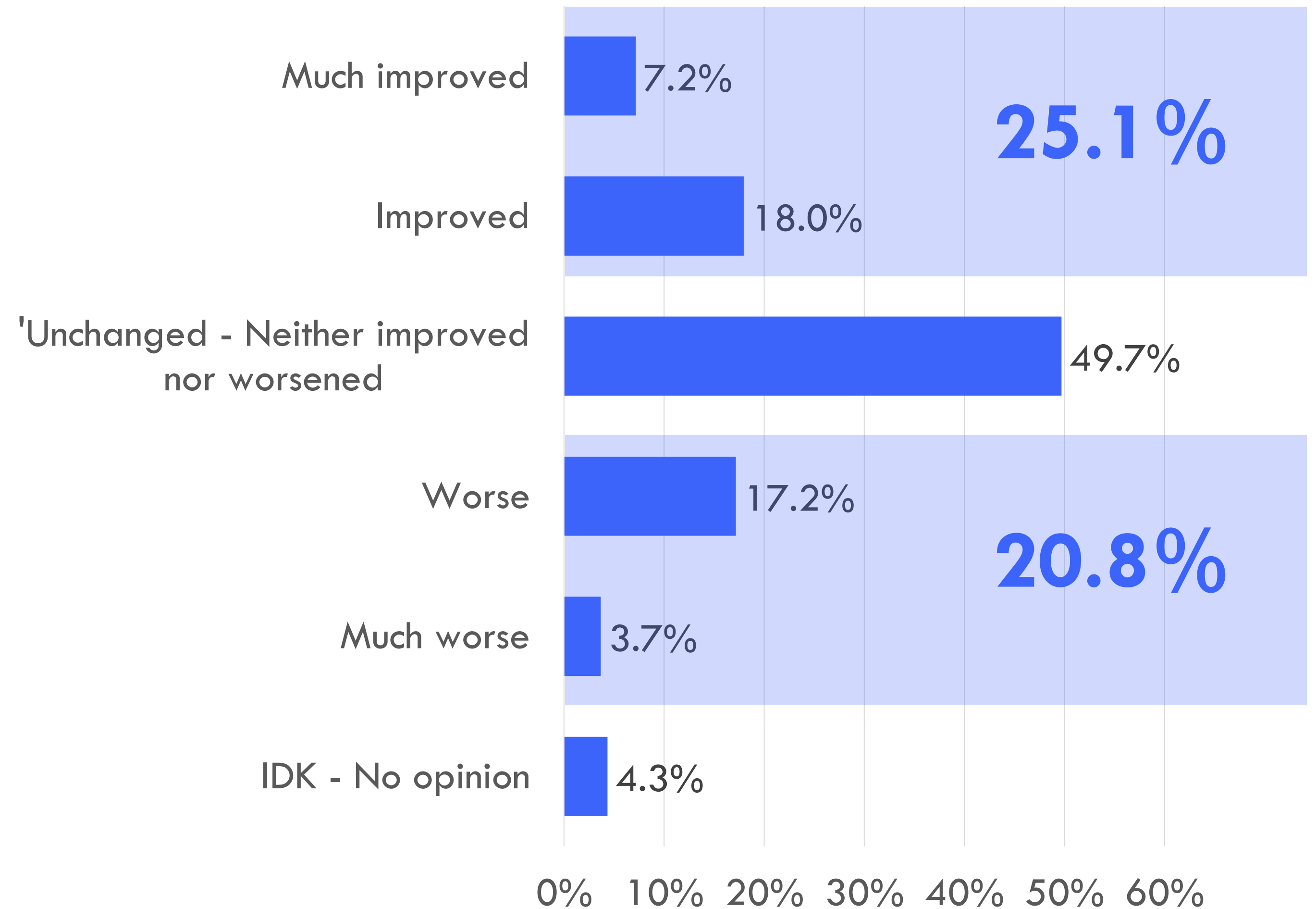
## Question:

Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

## Question:

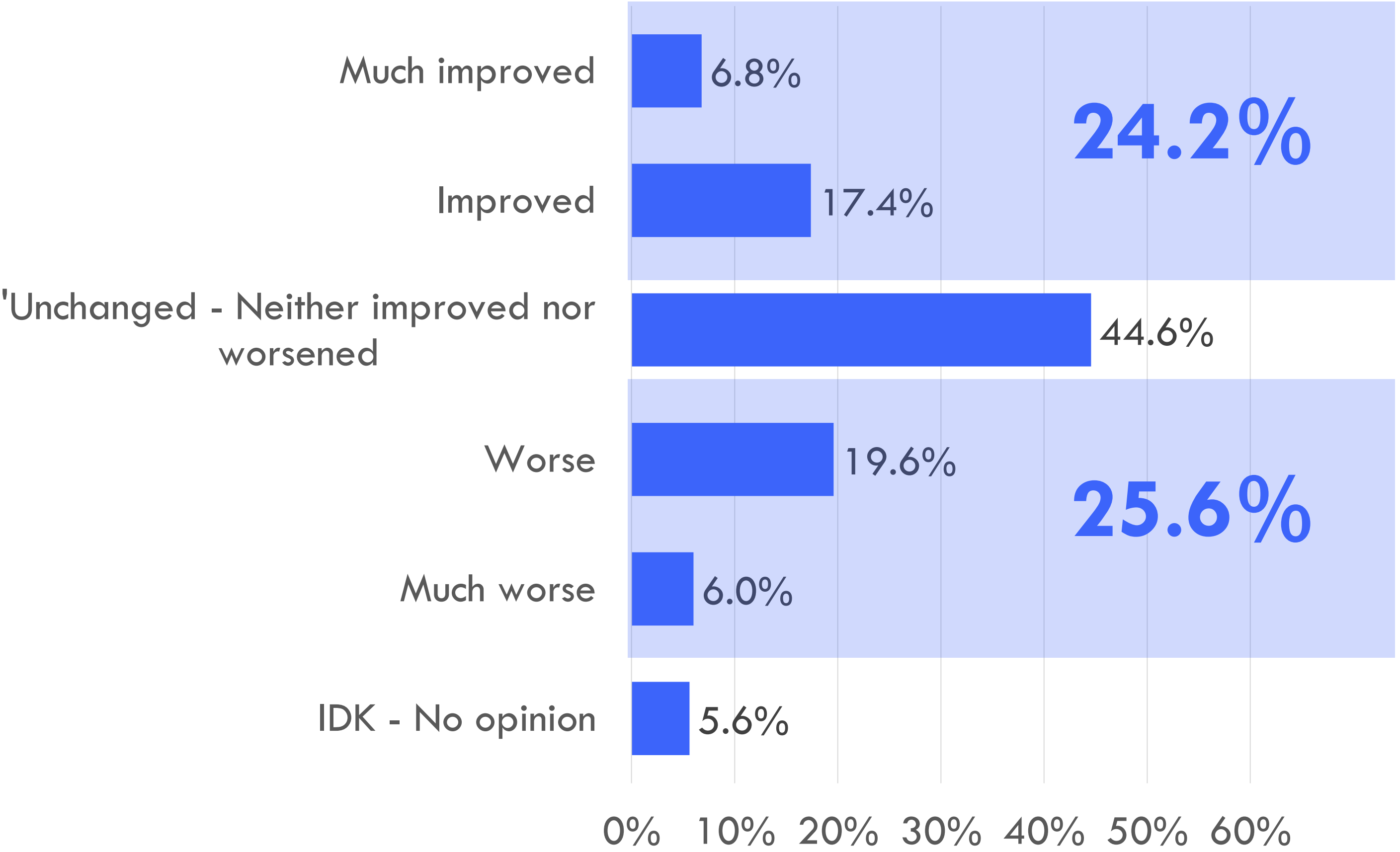
Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

## The Atmosphere or Vibe in the Destinations I Visit



(Base: All respondents, 4,023 completed surveys. Data collected April 15-22, 2023.)

# Customer Service in Hotels



## Question:

Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

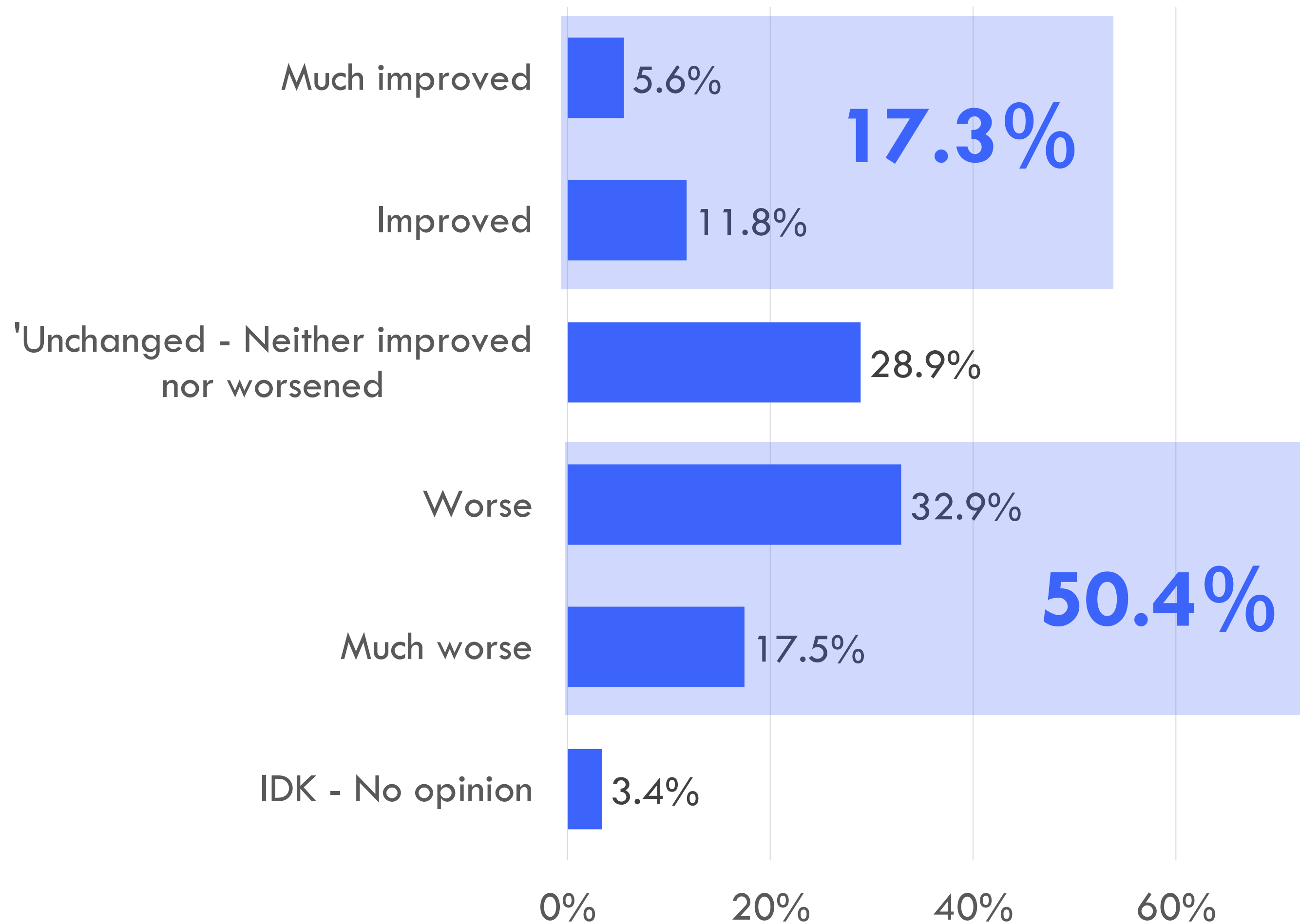
# Poll:

Compared to before the pandemic, how would you rate the **Behavior of Other Travelers?**





# Behavior of Other Travelers



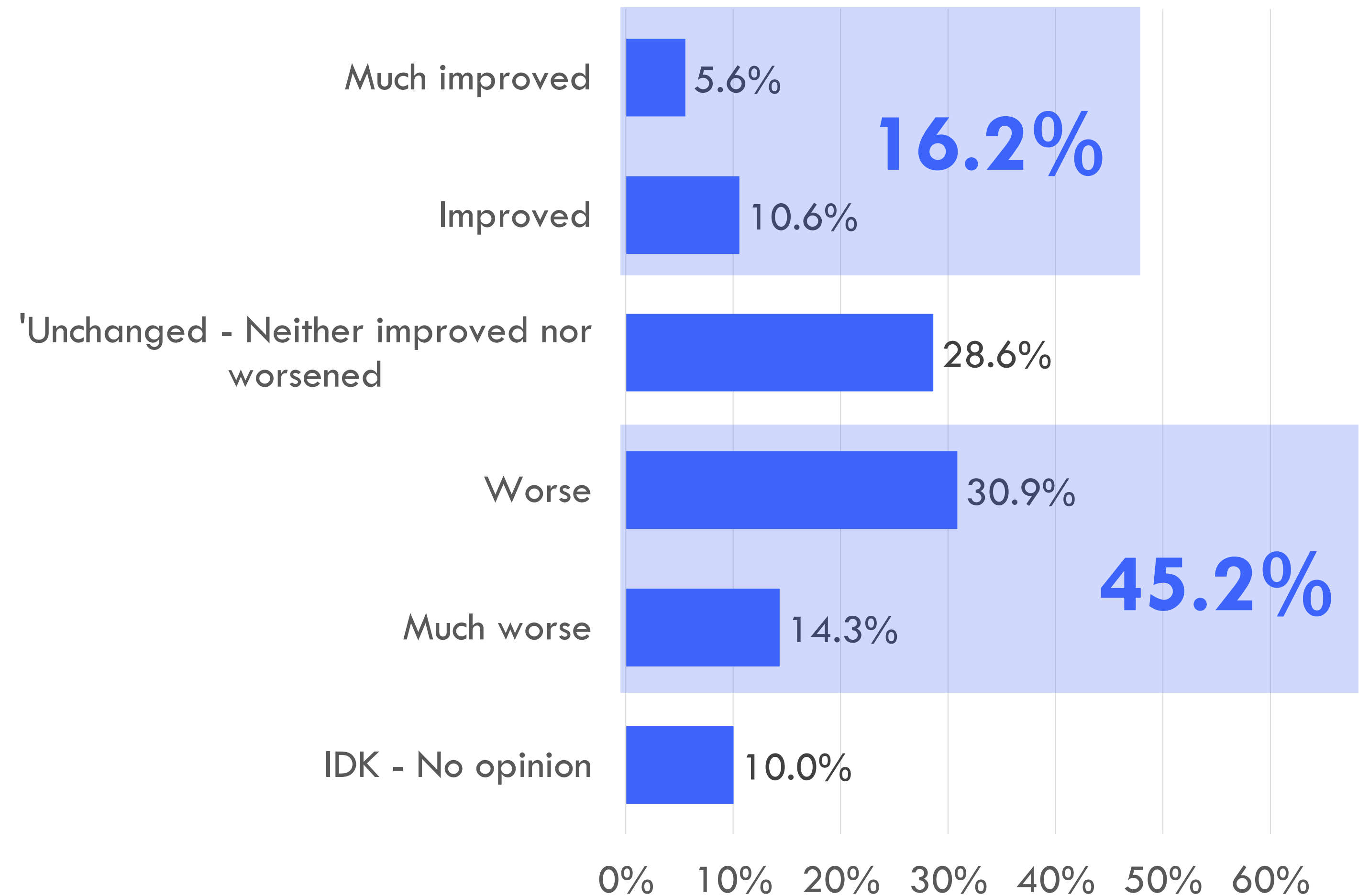
## Question:

Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

## Question:

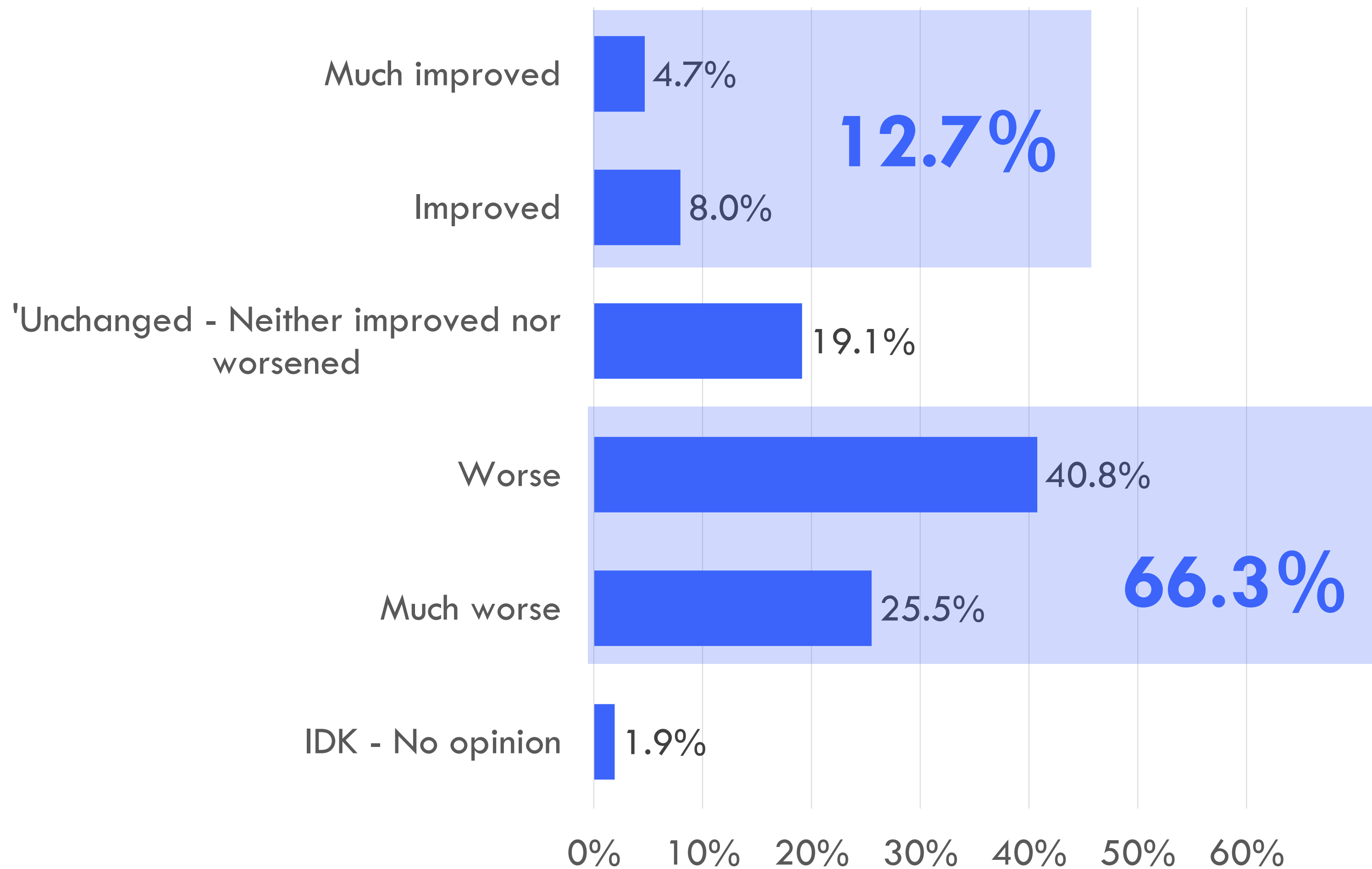
Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

# Reliability of air travel (timeliness, flight availability, etc.)



(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)

# The Overall Cost of Traveling



## Question:

Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

# Poll:

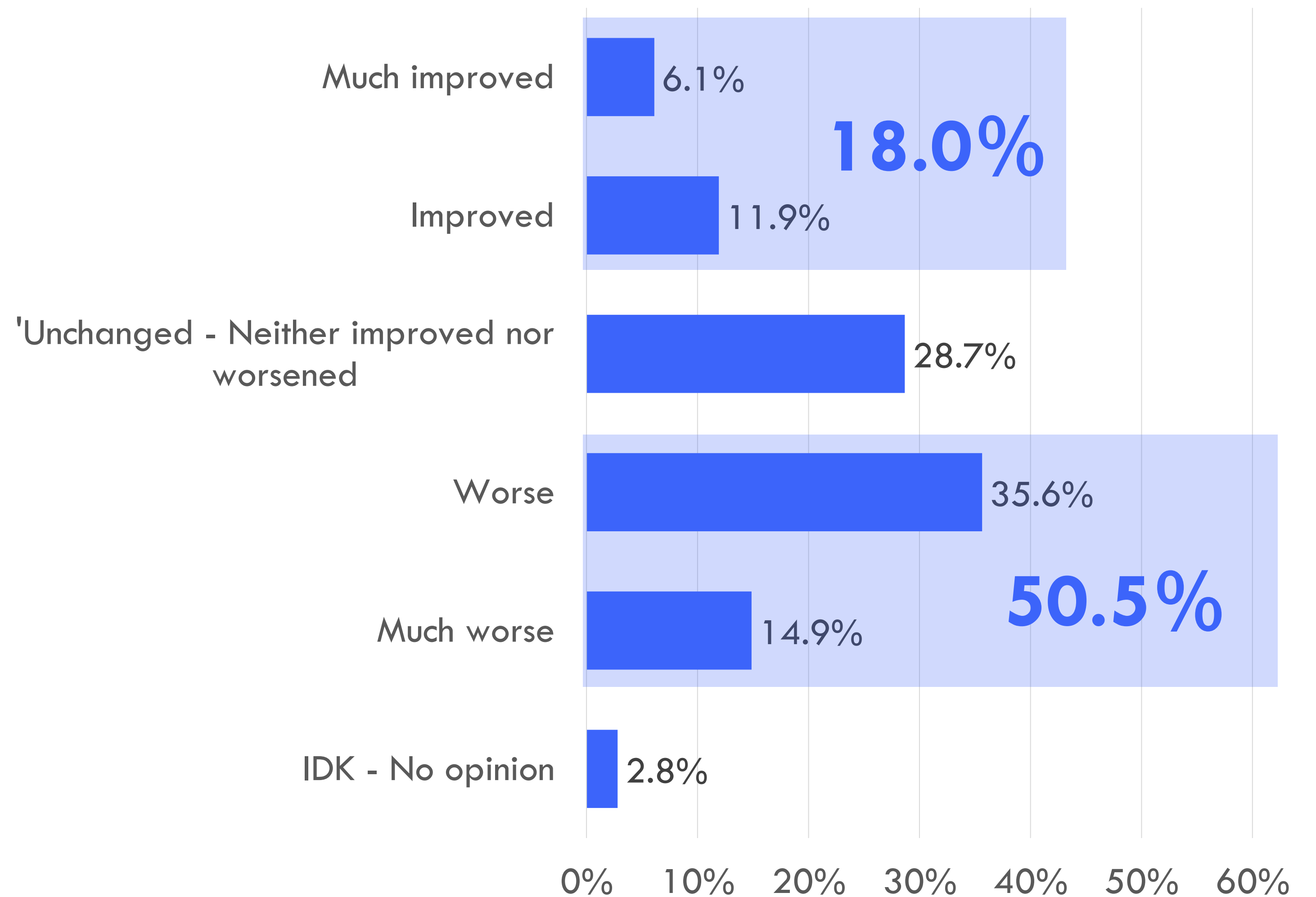
Compared to before the pandemic, how would you rate the **Value for the Money You Receive?**



## Question:

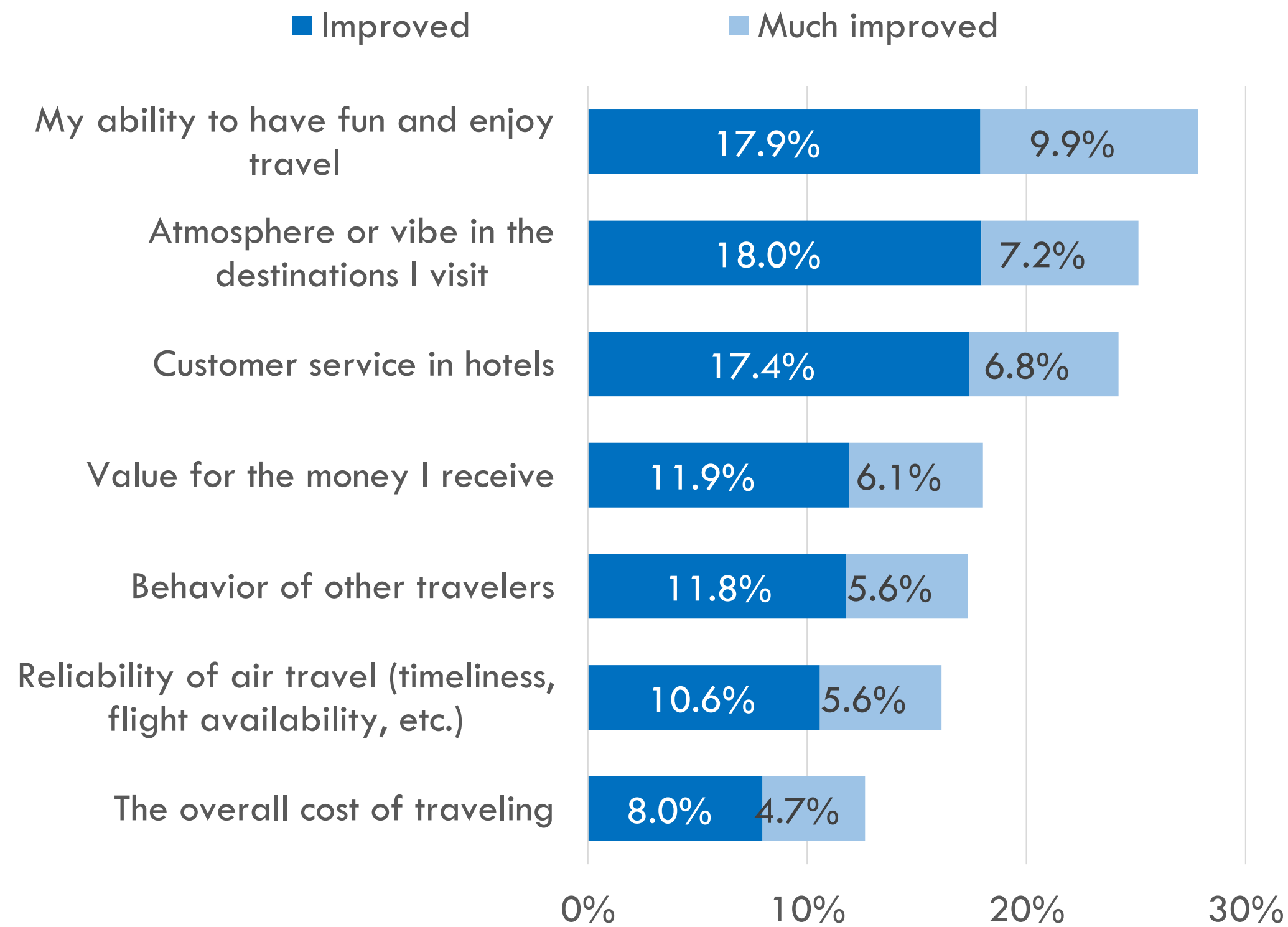
Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

# Value for the Money I Receive

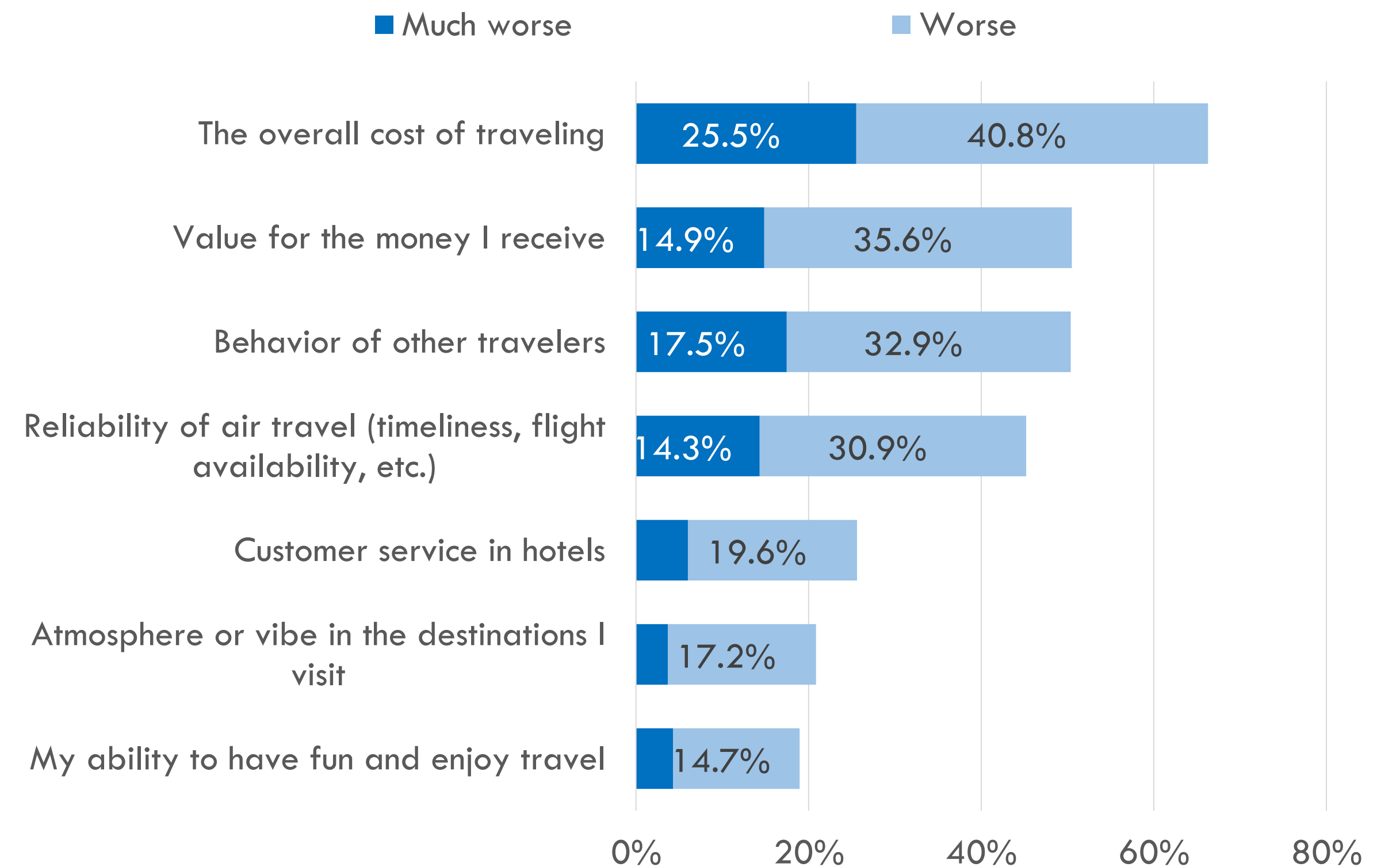


# HOW HAS THE TRAVEL EXPERIENCE CHANGED?

## The Good



## The Bad



**Question:** Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

A group of seven diverse people are sitting on a wooden bench in a modern, brightly lit interior space. They are all engaged with technology: some are using laptops, others are on tablets or smartphones. The group includes men and women of various ethnicities and ages, all appearing to be in a collaborative work or social setting. The background features large windows with a grid pattern, suggesting an office or public space environment.

Deeper  
Segmented  
Local  
Insights

# THE STATE OF THE AMERICAN TRAVELER DASHBOARD TOOL

Millennial AND WEST AND Parent to School Aged Children Who Travel with Them At Least Once a Year

Filter

Explore

Export

Search...

118 %

118 %

118 %

118 %

Edit

## Traveler Behaviors

Total

Total

Recent Visitors

Likely Visitors

Recent or Likely Visitors

Demographics

Feeder Markets

**Travel Behaviors**

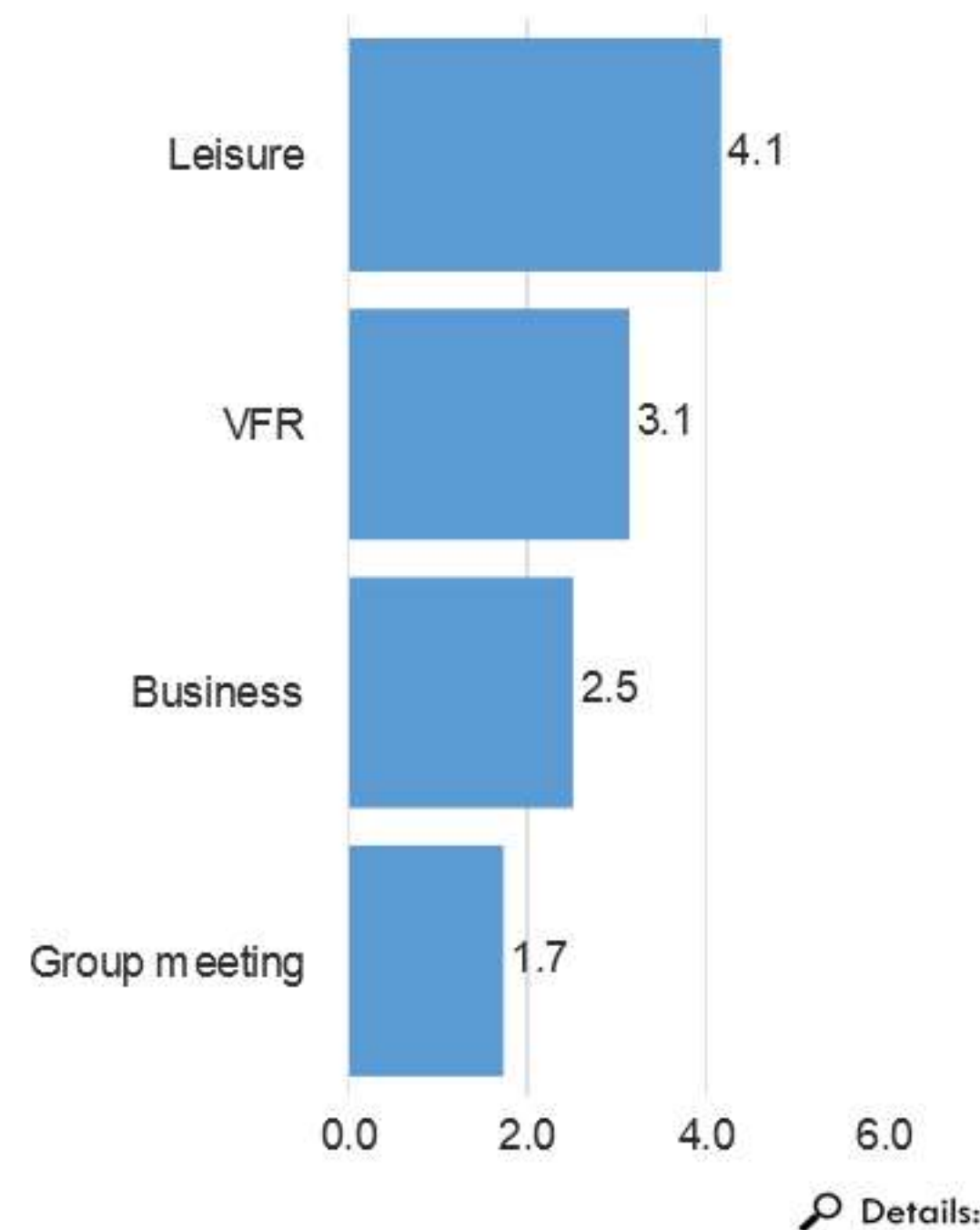
Competitive Situation

Fun Facts

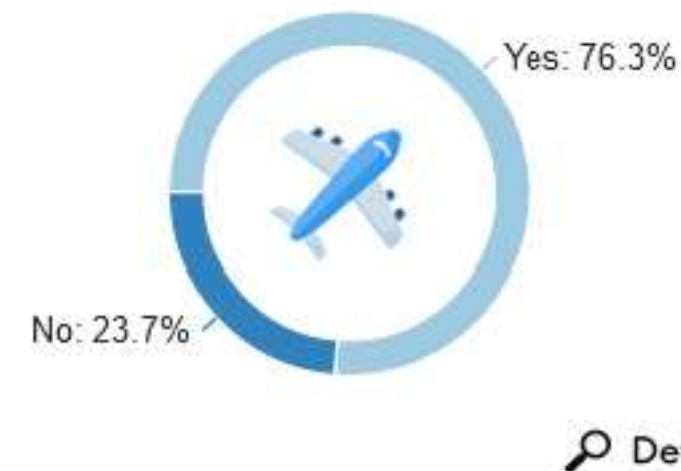
Travel Planning Resources

Media Consumption

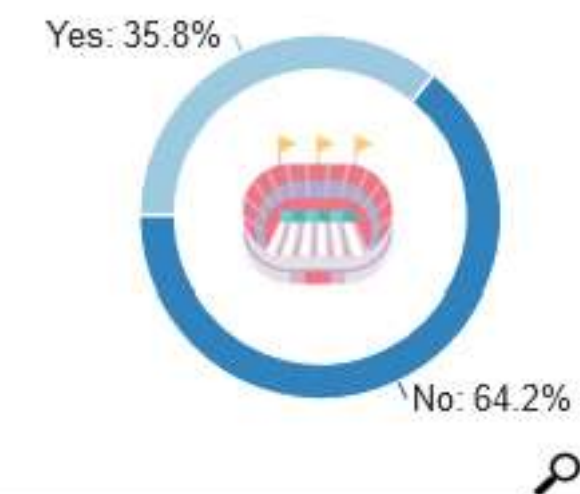
### NUMBER OF TRIPS TAKEN (PAST 2 YEARS)



### % USING COMMERCIAL AIRLINES



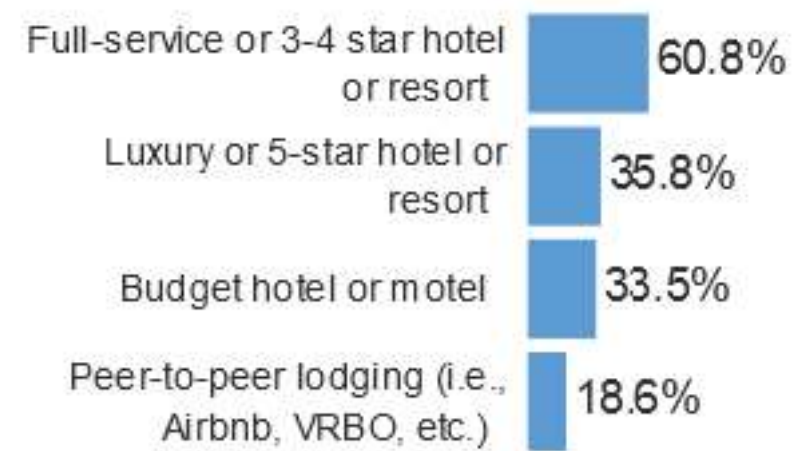
### TRAVEL TO ATTEND SPORTING EVENTS



### % USING CRUISE LINES



### LODGING PROPERTY TYPES USED



### TRAVEL TO ATTEND SPECIAL EVENTS & FESTIVALS



### USE OF PEER-TO-PEER LODGING

18.6%

Base: All respondents. 1859 responses.



# THE STATE OF THE AMERICAN TRAVELER DASHBOARD TOOL

Millennial AND WEST AND Parent to School Aged Children Who Travel with Them At Least Once a Year

Filter

Explore

Export

Search...

118%

118%

Edit

## Media Consumption

Total

Total  
Recent Visitors  
Likely Visitors  
Recent or Likely Visitors

Demographics

Feeder Markets

Travel Behaviors

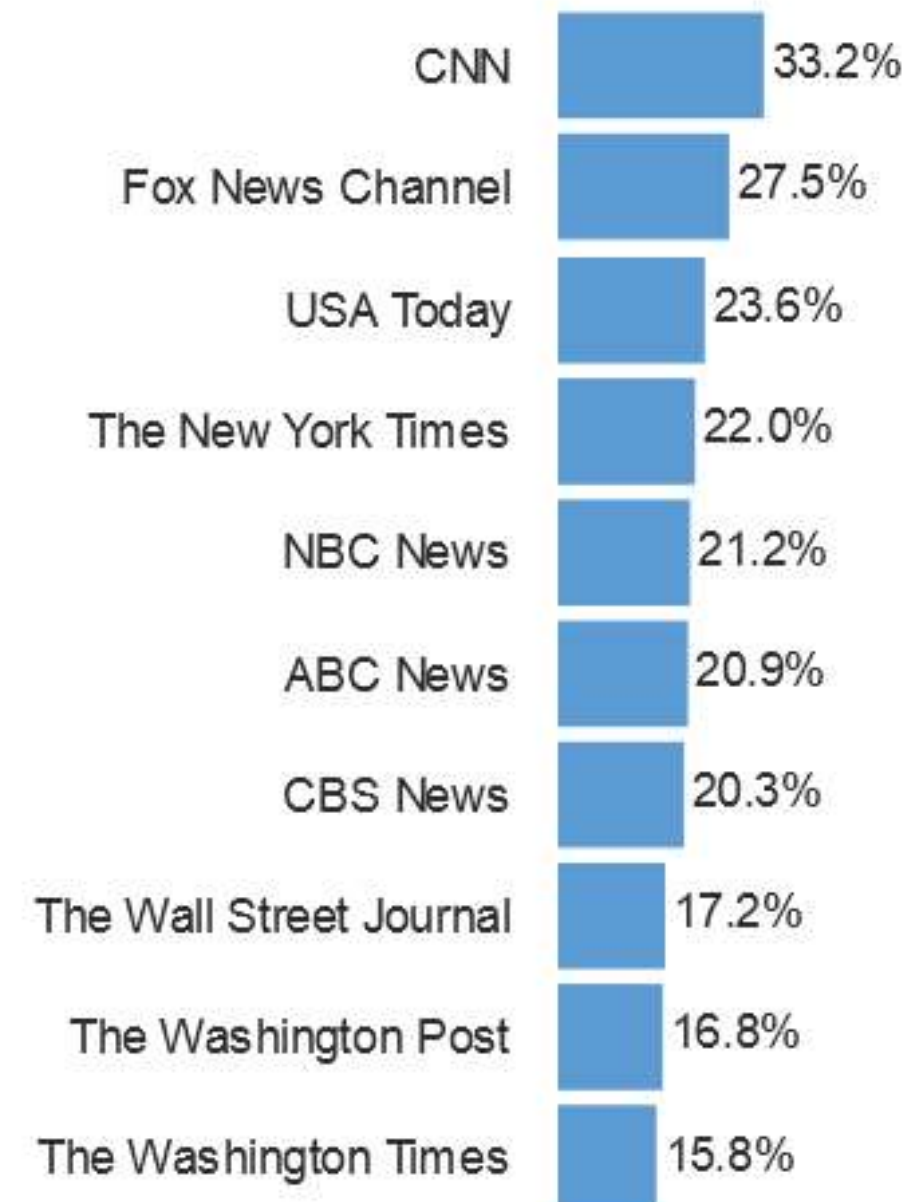
Competitive Situation

Fun Facts

Travel Planning Resources

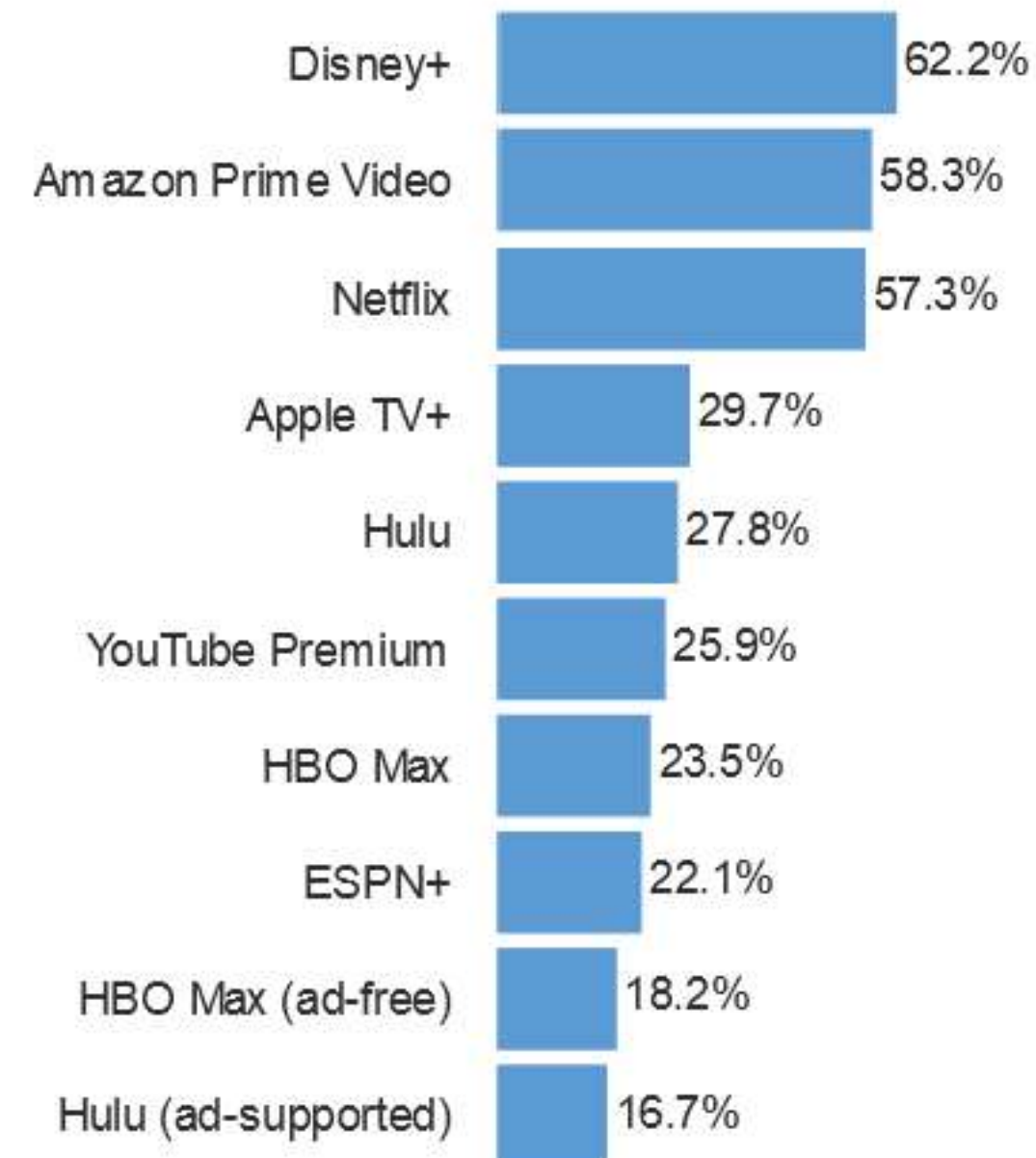
Media Consumption

### NEWS CHANNELS USED



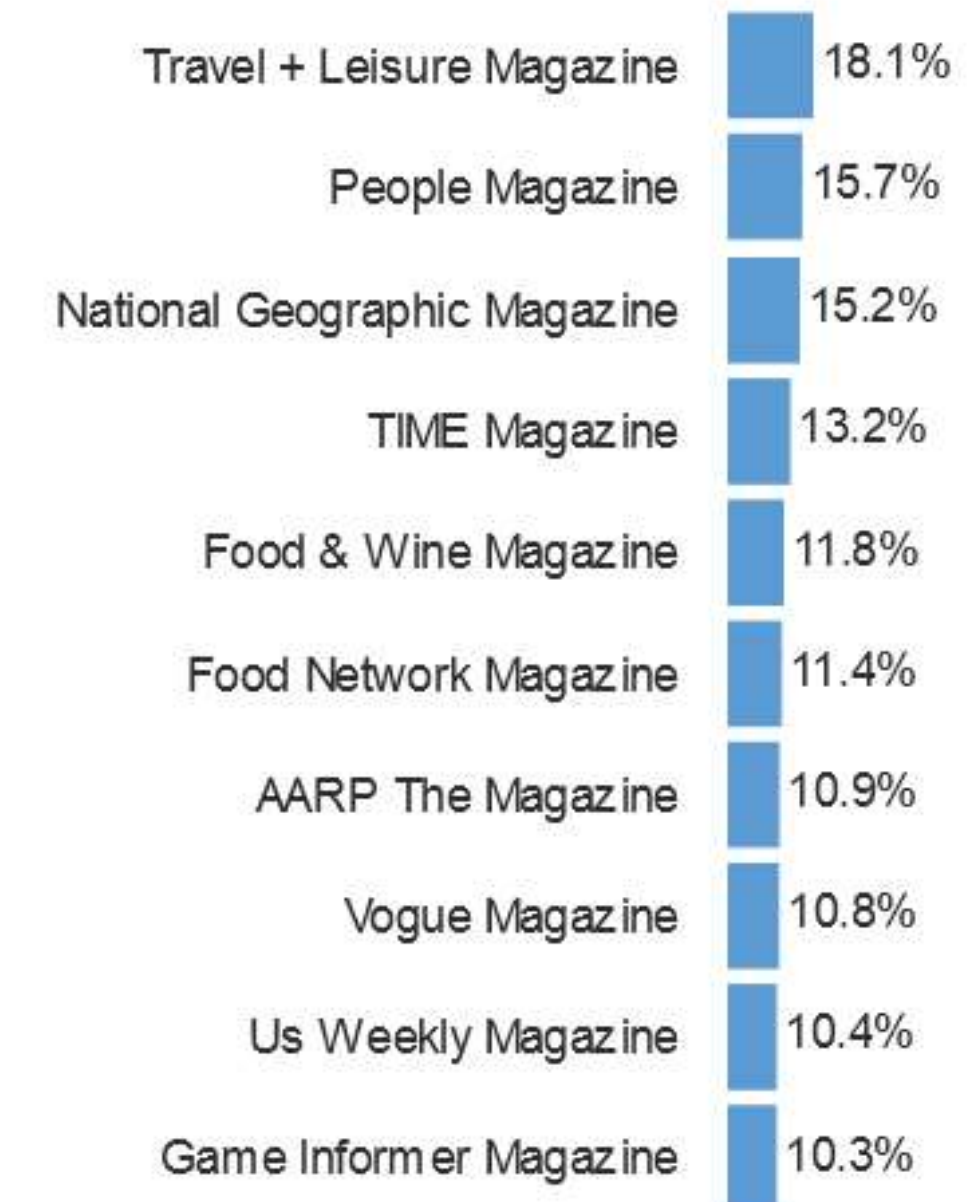
Details:

### STREAMING MEDIA SERVICES USED



Details:

### MAGAZINES READ



Details:

Base: All respondents. 1284 responses.



# PASSION PROFILES

- Music festivals (multi-day events)
- Musical concerts (pop, rock, hip hop, alternative, modern, etc.)
- Musical concerts (classical, symphonies, etc.)
- Mountain biking (off road or gravel)
- Motorcycle touring
- Hunting (Big game)
- Hunting (Birds, small game)
- Hiking (day hikes)
- Hiking (over-night on trail, longer haul)
- Camping
- Recreational vehicle travel
- Food and cuisine
- Wine
- Craft beers
- Sailing or boating
- Canoeing, kayaking or rafting
- Photography
- Bars, nightclubs
- Theater or plays, (on or off Broadway productions)
- Art museums
- Attending professional sports
- Attending college sports
- Asian pop culture (Anime, Manga, K-Pop, etc.)
- Video games - Video gaming
- Golf
- Fishing (Freshwater)
- Fishing (Saltwater or deep sea)
- Enjoying theme or amusement parks
- Skiing or snowboarding
- Birdwatching - Birding
- Crafting, DIY or creative projects
- Fitness, health and wellness
- Vegan foods & lifestyle
- Fashion
- International travel (taking trips outside the USA)
- Marijuana or cannabis-related products
- Gaming or gambling
- Geocaching
- Shopping
- Visiting historical sites and attractions
- Voluntourism activities (Volunteering while traveling)
- Agri-tourism

# MORE RESEARCH WE CAN PROVIDE

- Visitor & Target Audience Profiles
- Audience Persona Identification
- Brand Performance
- Visitor Activity Analysis & Segmentation
- Resident + Stakeholder Research
- Advertising Testing

[info@destinationanalysts.com](mailto:info@destinationanalysts.com)

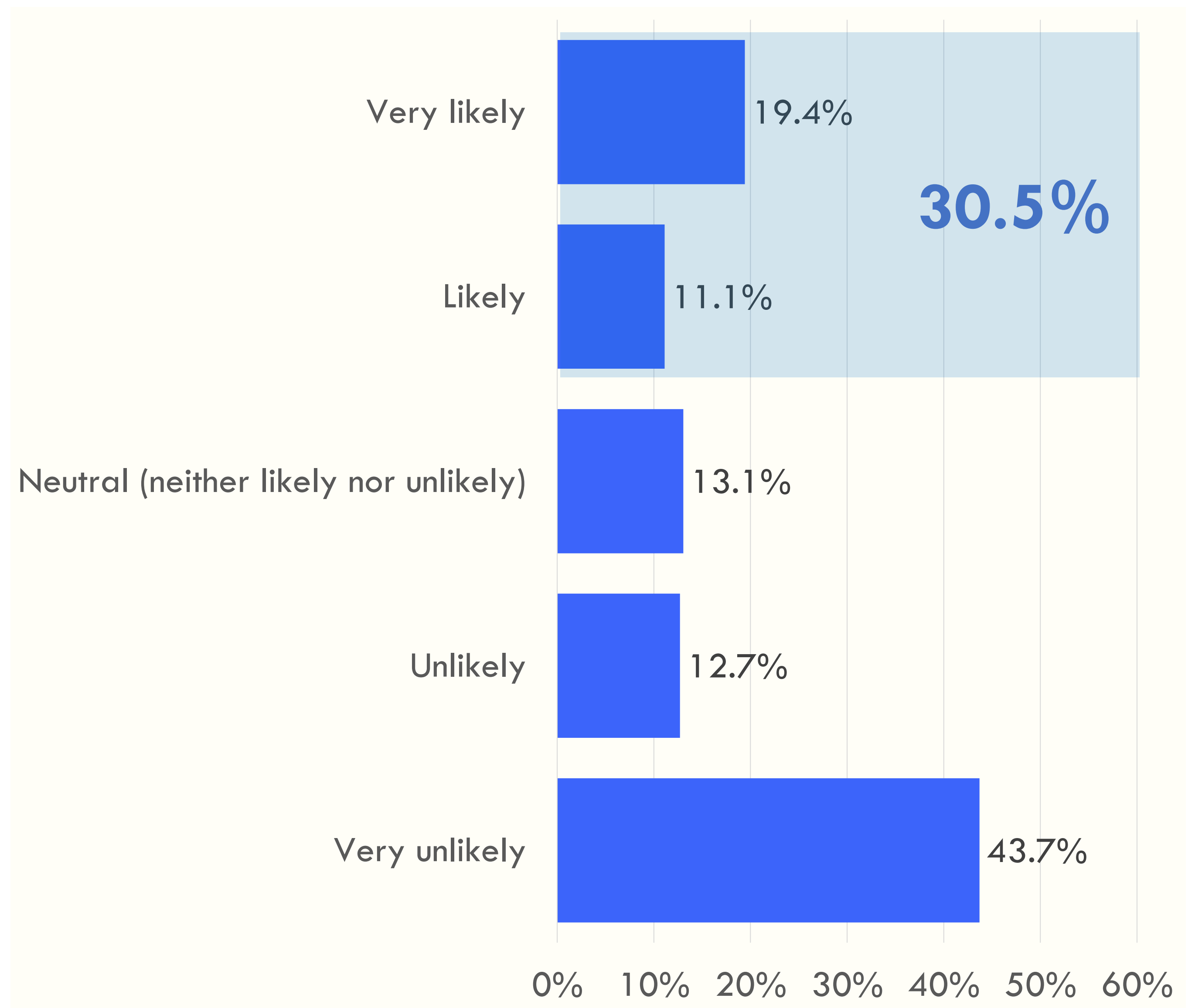




# International Travel

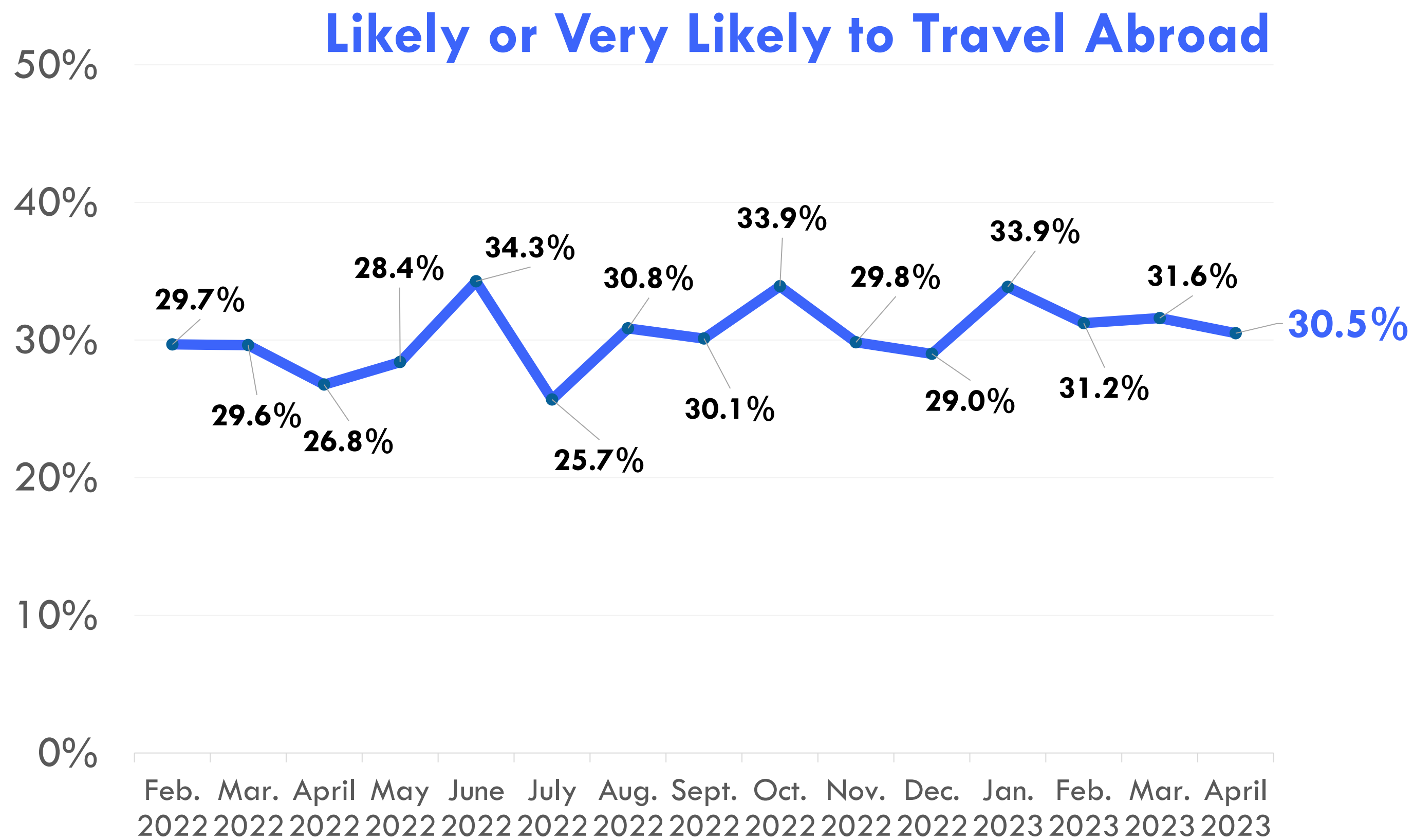
**Question:**

**How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?**



*(Base: All respondents, 4,057 completed surveys. Data collected March 15-22, 2023.)*

**Question:** How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?



Expectations for travel outside the United States has also shown little change this year.

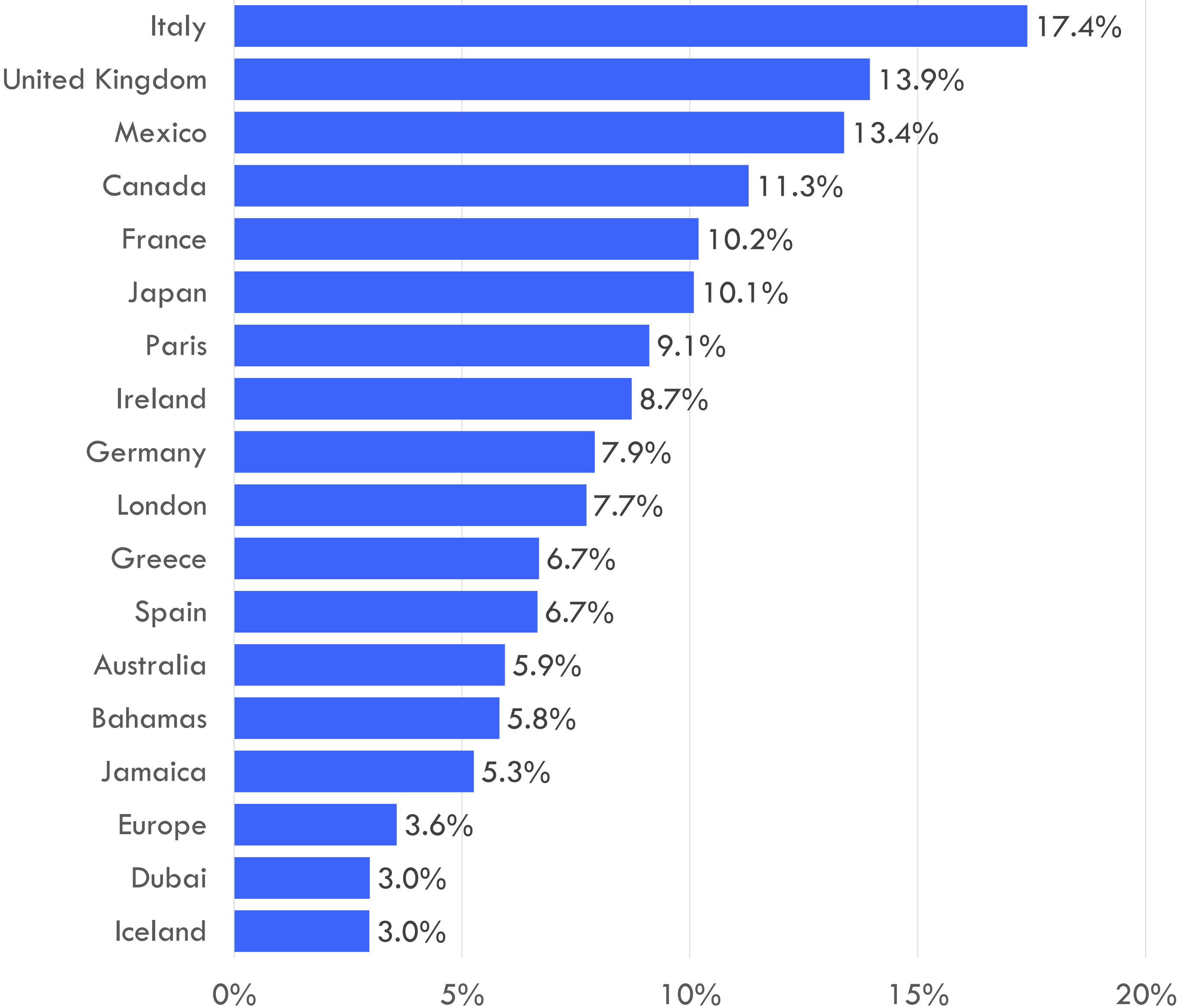
# MOST DESIRED FOREIGN DESTINATIONS IN THE NEXT 12 MONTHS (UNAIDED)

**Question:** Which foreign destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

**(Please only include destinations outside the United States)**

*(Base: All respondents, 2,137 completed surveys.)*

*Data collected April 16-21, 2023.)*





# WELCOME



**ABHISHEK**

Chicago, IL



**RINA**

Irvine, CA



**MARK**

DFW, TX



**ALIERA**

Austin, TX



**KATRINA**

Parlin, NJ

# ABHISHEK

Chicago, IL

## Enjoys:

- Travel that allows him the chance appreciate and experience different cultures, food, and other people's ways of living.

## Near-Term Travel Plans:

- Is planning a trip to Scotland for this upcoming summer.



# Rina

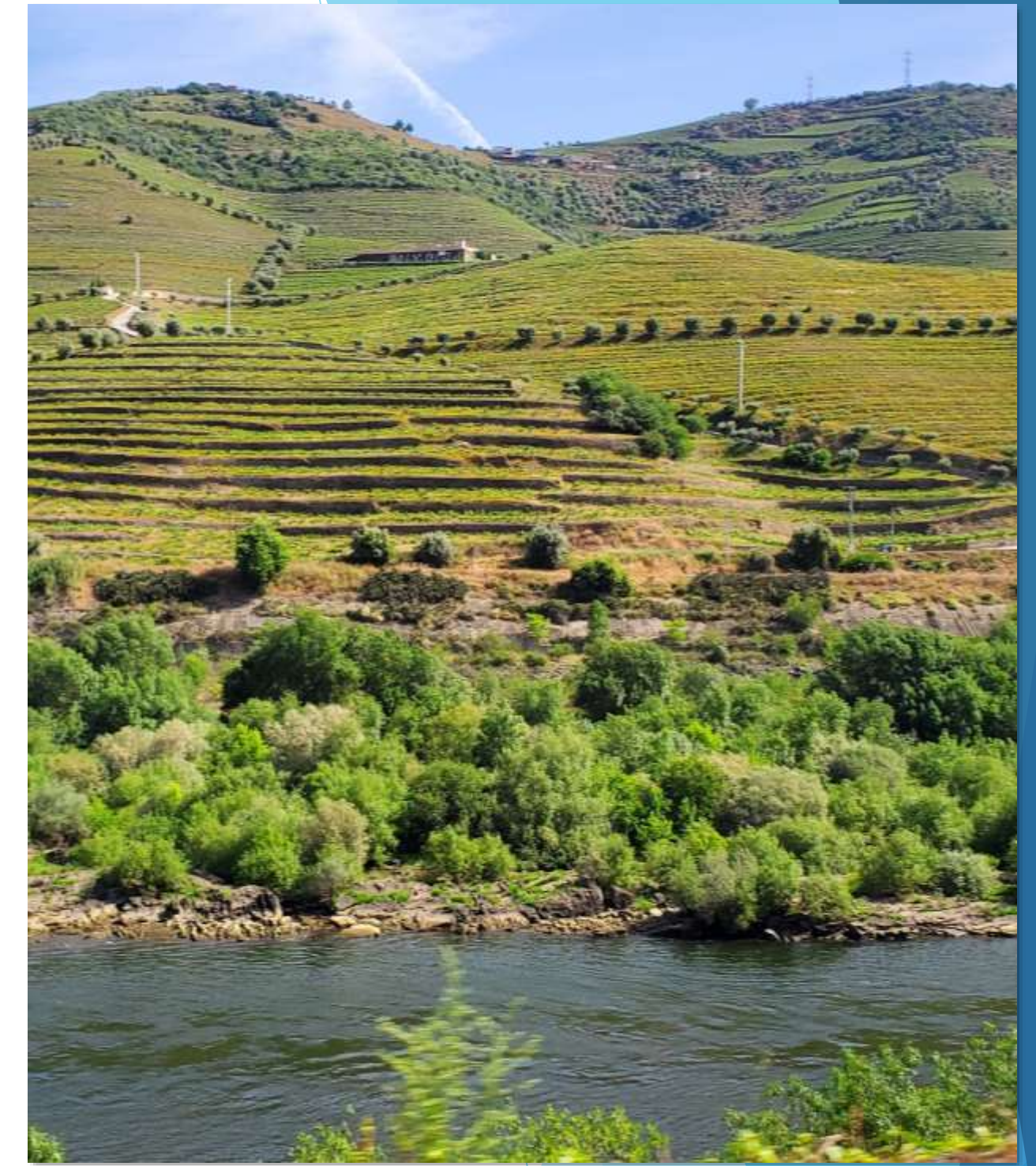
Irvine, CA

## Enjoys:

- Traveling to decompress from the stresses of work and everyday life.

## Near-Term Travel Plans:

- Just got back from Portugal last week and is also planning on visiting Scotland and Alaska.



# Mark

DFW, TX

## Enjoys:

- Getting out of his normal daily and weekly routines, exploring other cultures and cuisines, and meeting new people.

## Near-Term Travel Plans:

- Is planning a trip to Iceland for this upcoming summer.



# Aiera

Austin, TX

## Enjoys:

- Enjoys traveling because it lets her see the world through a different lens and finds it very rewarding to experience all the different cultures, cuisines, people, and history.

## Near-Term Travel Plans:

- Is planning a trip to Medellin Columbia for this upcoming summer.



# Katrina

Parlin, NJ

## Enjoys:

- Is motivated to travel to show her daughters the world. She wasn't able to do this growing up and wants them to experience new places/experiences.

## Near-Term Travel Plans:

- In the next six months, she would love to visit Mexico, Aruba, and Paris.

