

A person wearing a red jacket and a backpack is walking across a vast, frozen body of water. The ice is dark blue and covered in a network of white cracks. The person's reflection is clearly visible on the smooth surface of the ice. The horizon is distant, and the sky is a clear, bright blue with some light clouds. The overall scene conveys a sense of solitude and exploration in a cold, natural environment.

The State of the American Traveler



Happy 2024!

Future Partners

**Opportunity
powered by insight.**

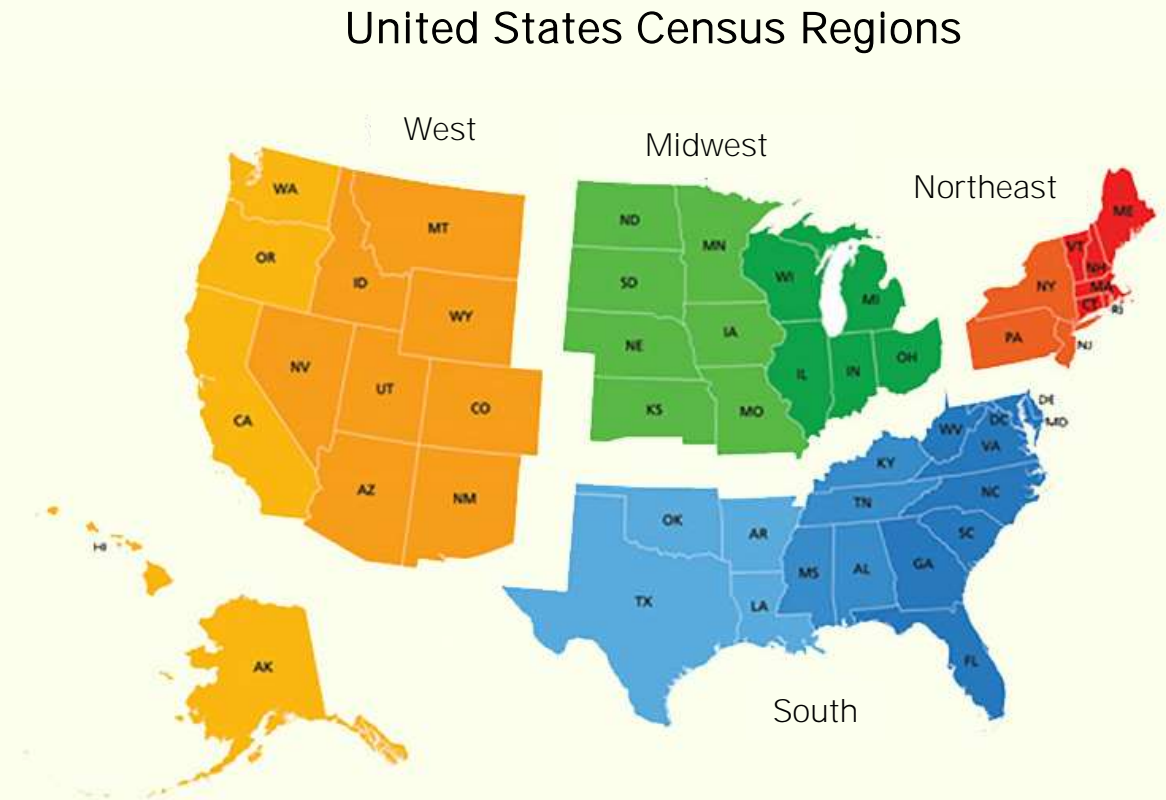
Today

- The Travel Outlook
- Crowdsourced Travel Predictions for 2024
- Gen Z Traveler Panel



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: [December 19-23](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Audience Poll

Predict the Future!

Audience Poll:

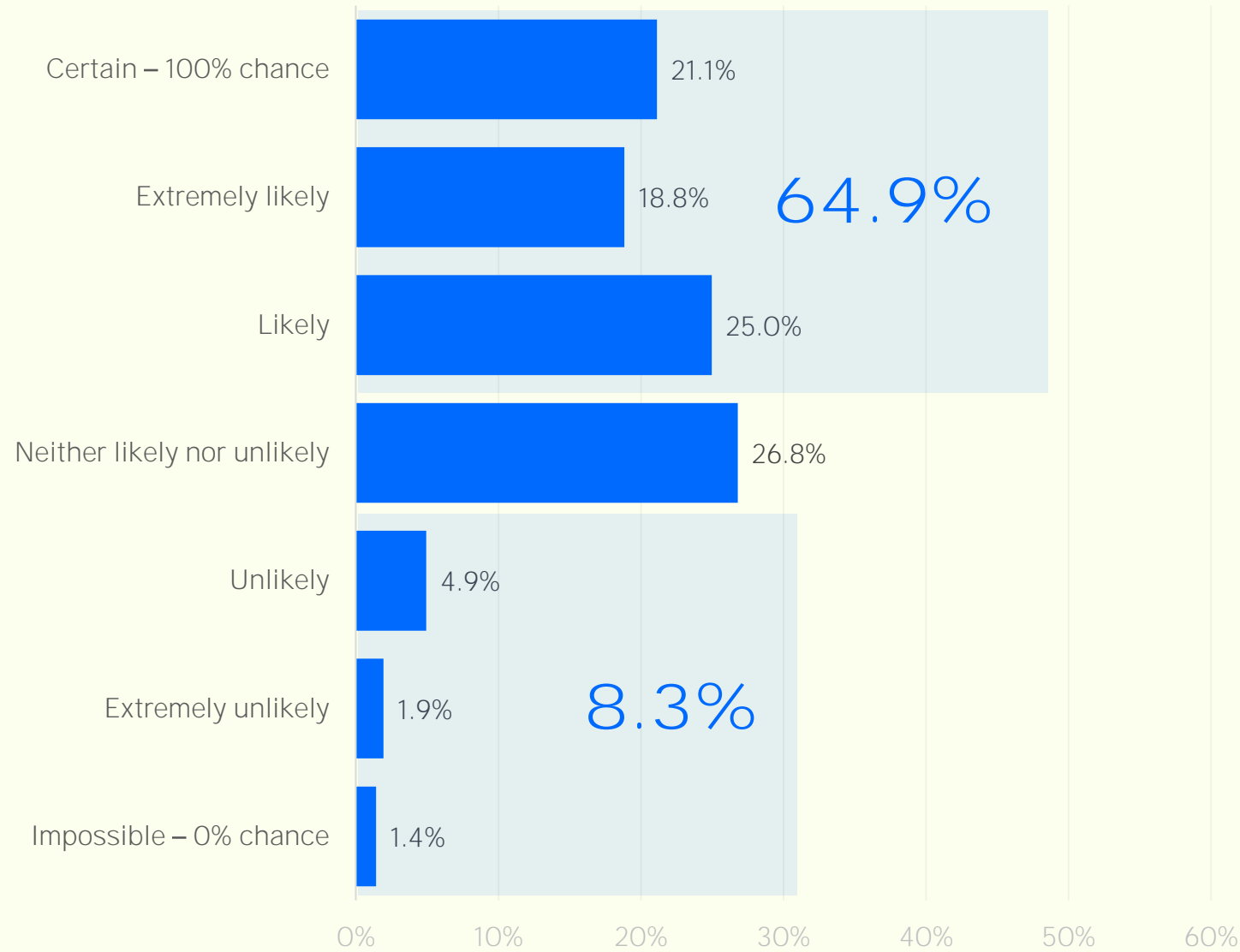
2024 will be a great year for me

- Certain – 100% chance
- Extremely likely
- Likely
- Neither likely nor unlikely
- Unlikely
- Extremely unlikely
- Impossible – 0% chance

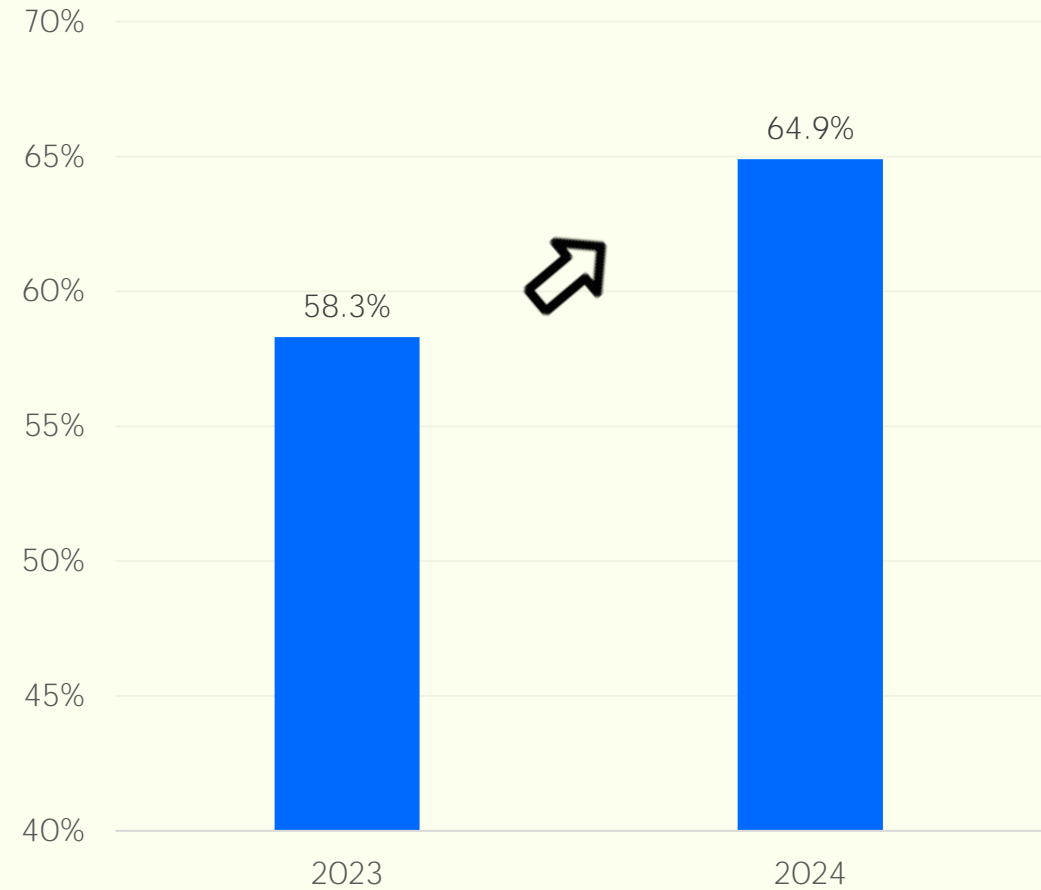
**What's the general vibe among
travelers?**

2024 will be a great year!

Statement:
2024 will be a great year for me.



Statement:
2024 will be
a great year
for me.

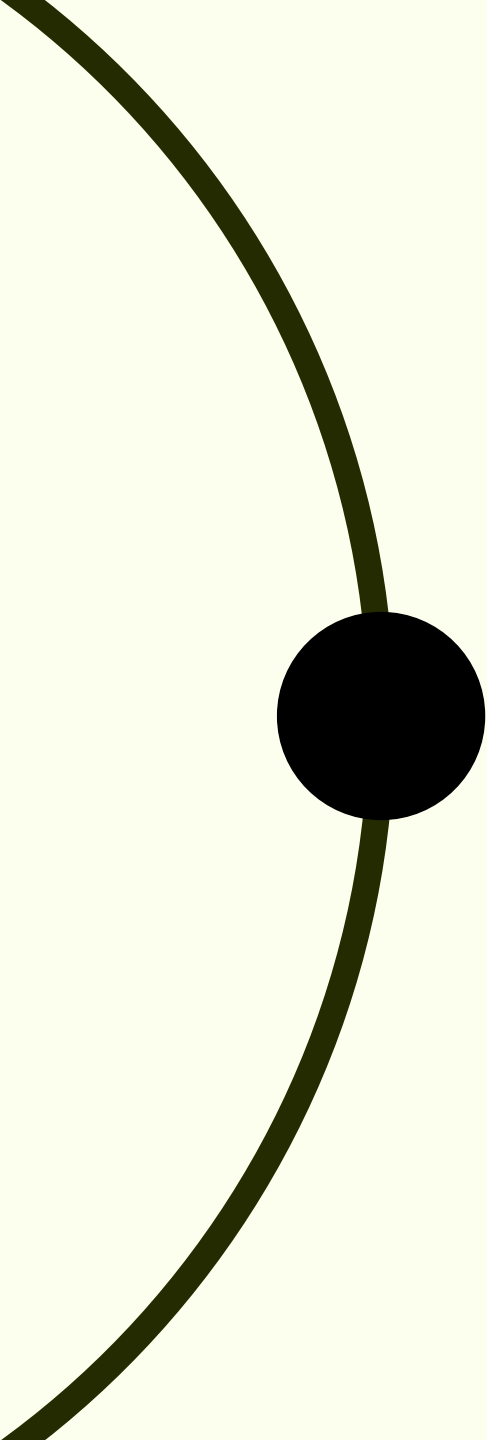


Presentation deck and
recording will be available on
our website:

FuturePartners.com

February Livestream
Registration





The Travel Outlook: Current Sentiment

February Livestream
Registration



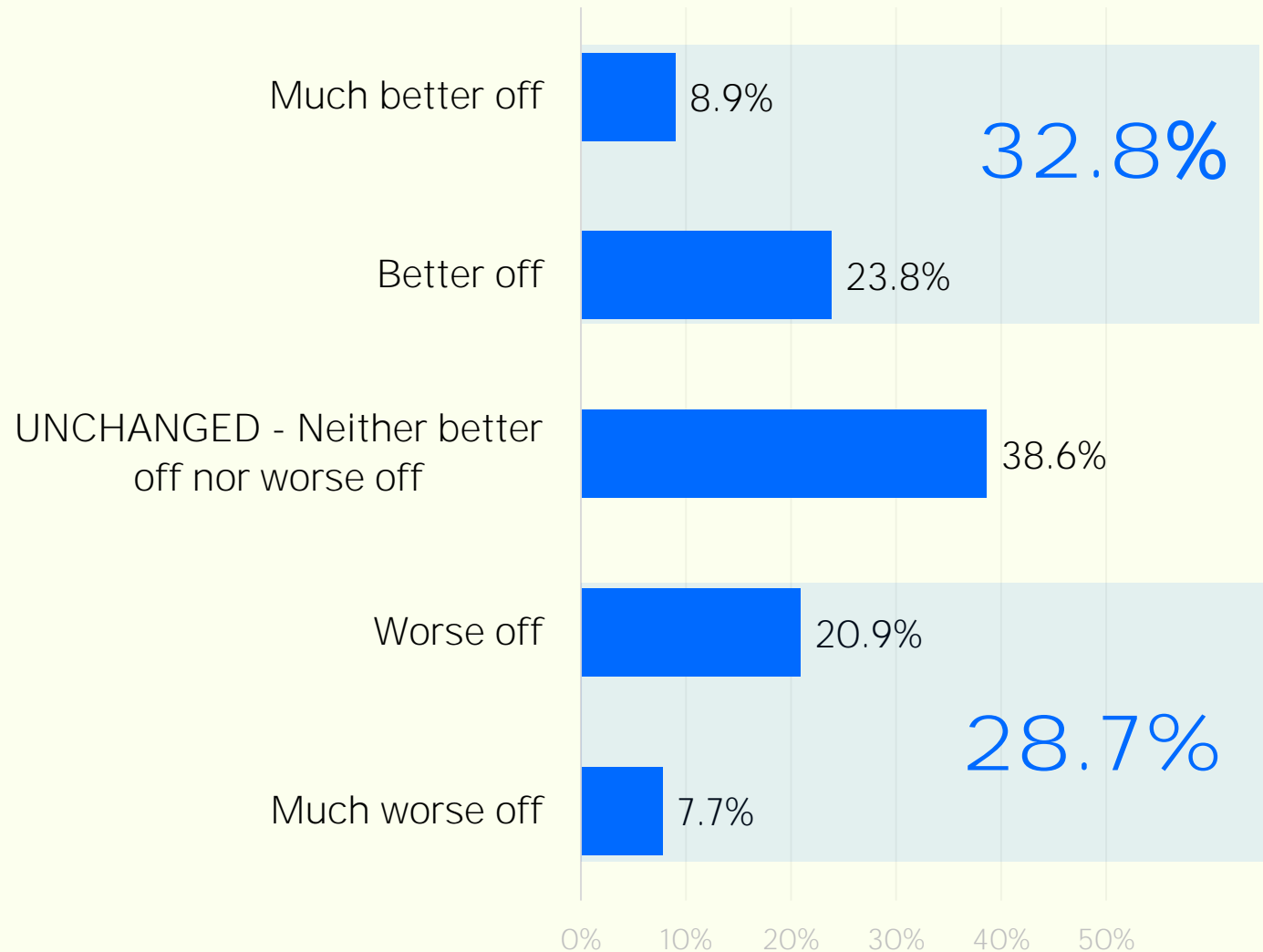
Travelers' personal financial situation showed a slight weakening this month relative to last month. But, compared to one year ago, traveler sentiment has improved.



Current financial sentiment is split.

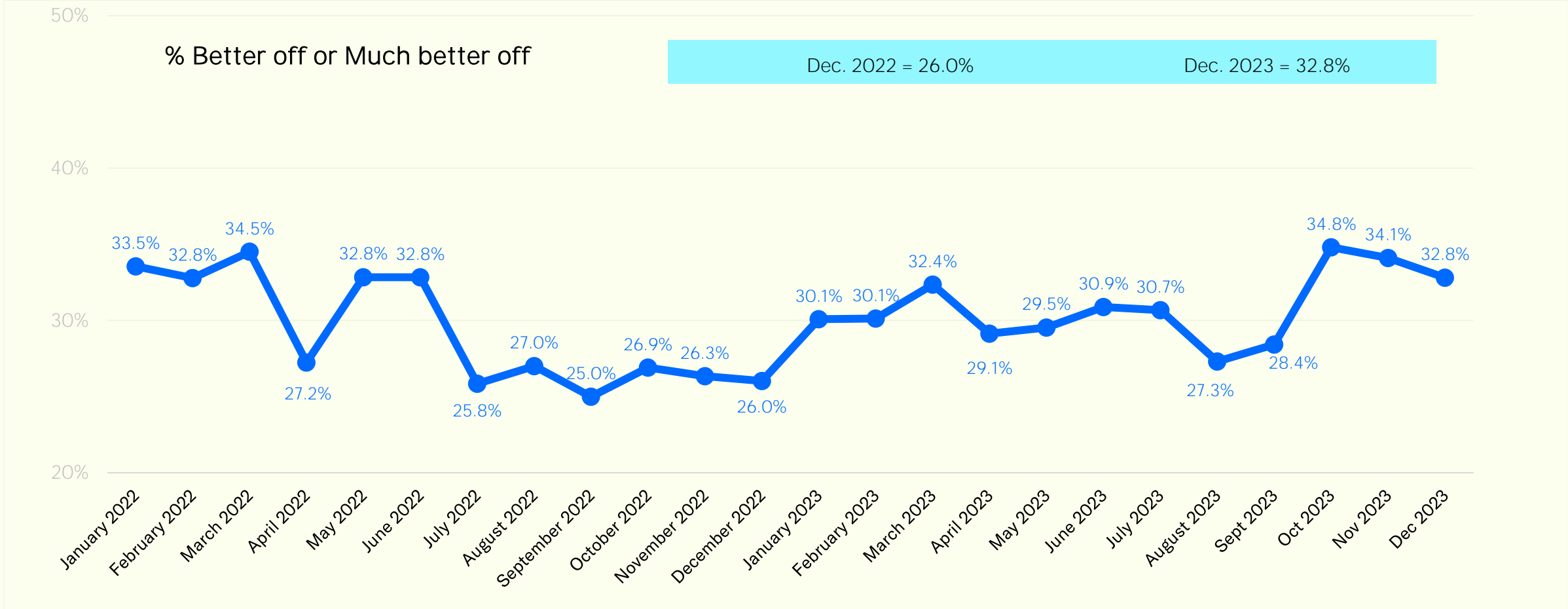
Question:

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



Current financial sentiment weakened slightly this month but is notably up compared to last year.

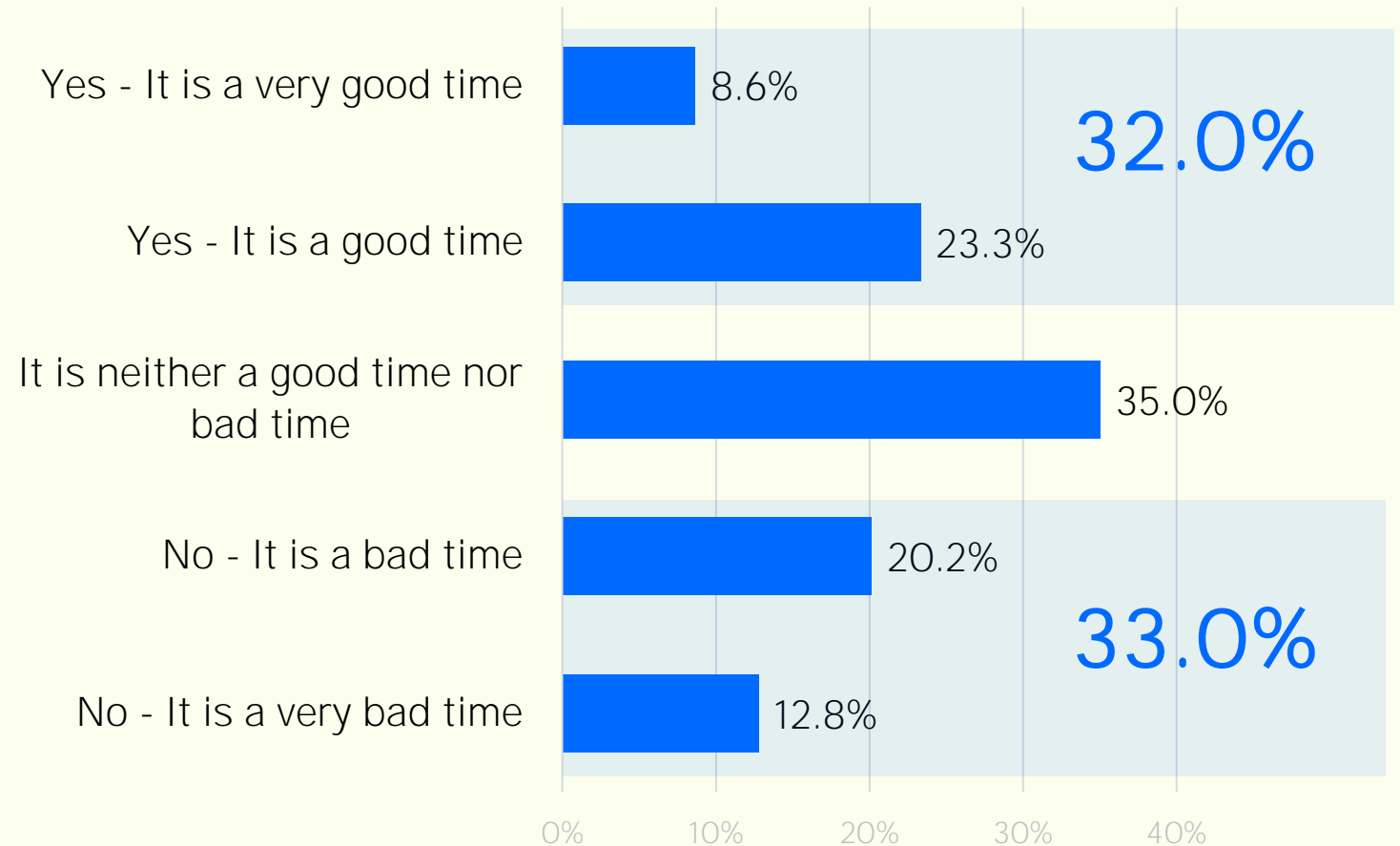
Question:
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



The belief that now is a good time to spend on travel also weakened

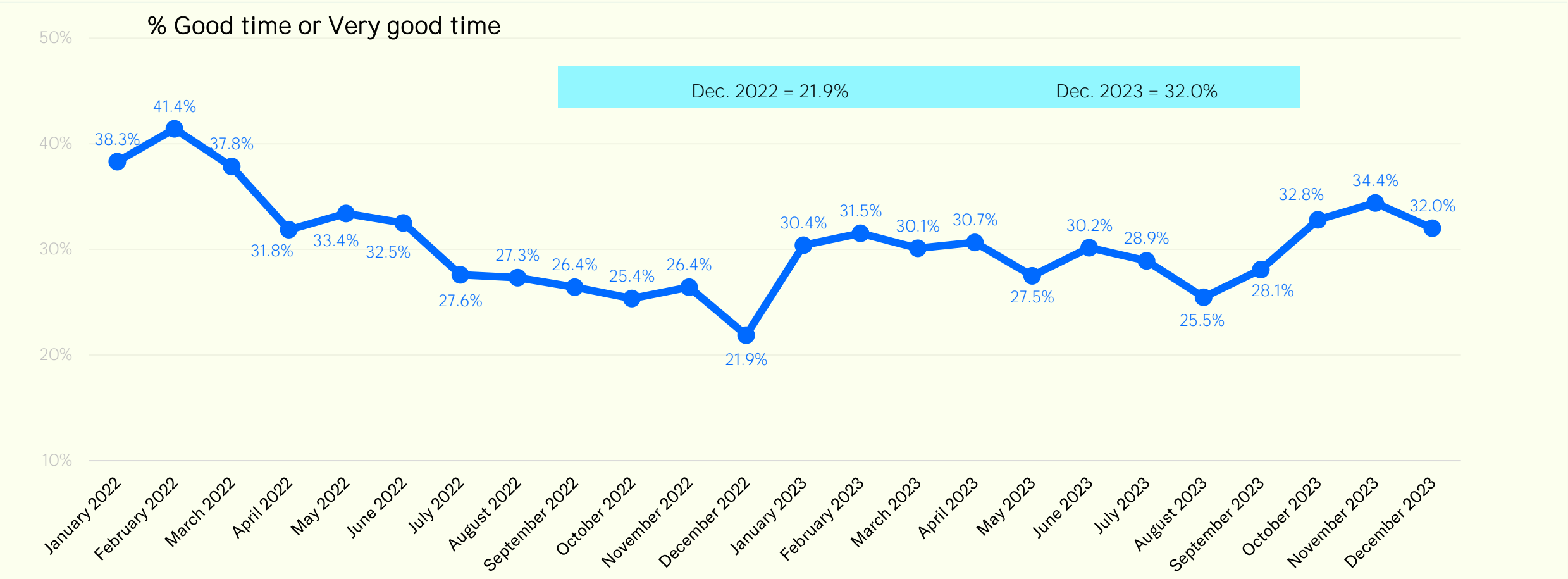
Question:

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?



Although positive feelings toward travel spending remain above the 12-month average

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?

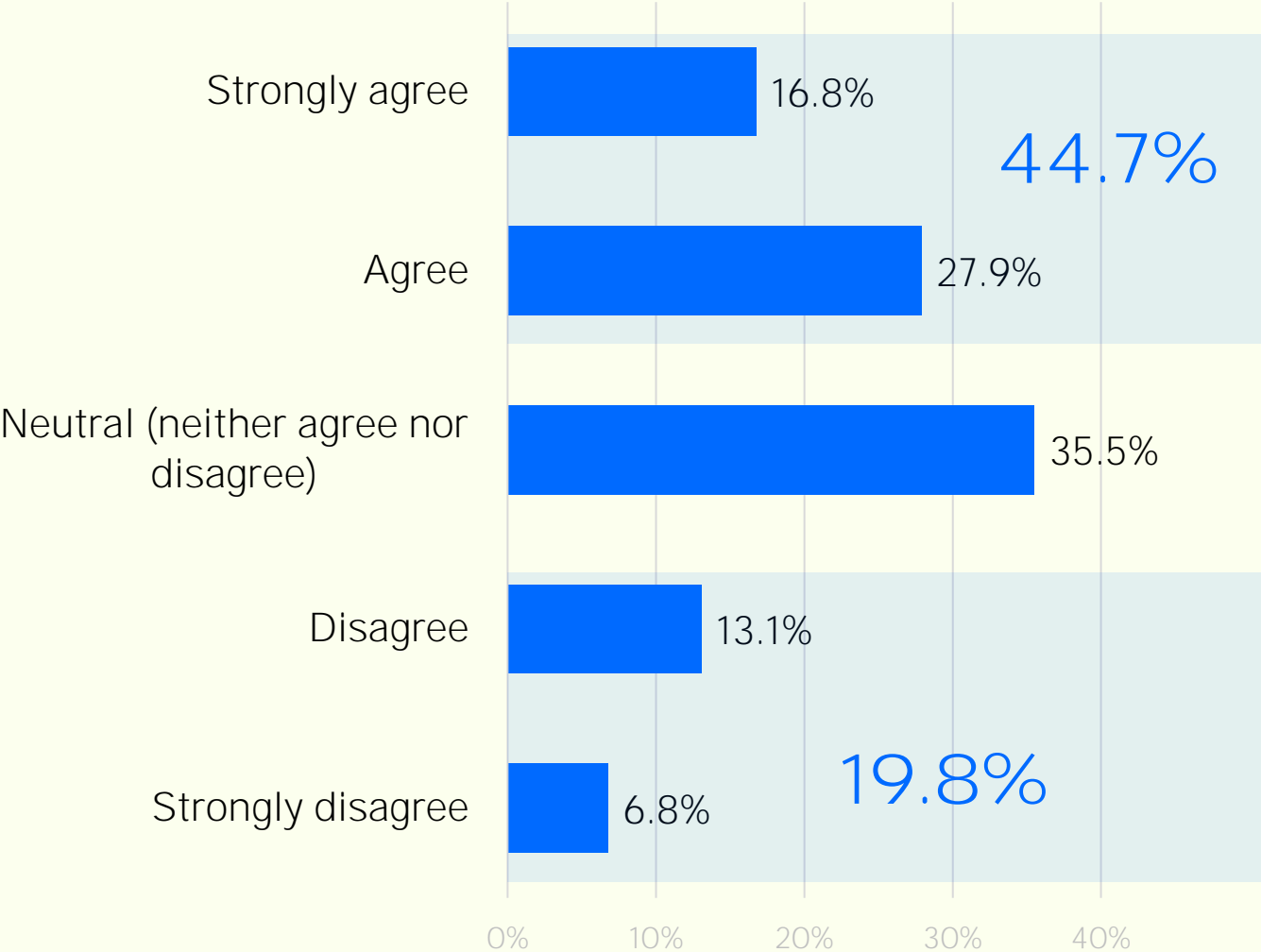


Concerns about a recession continue to subside, reaching a post-Pandemic era low.



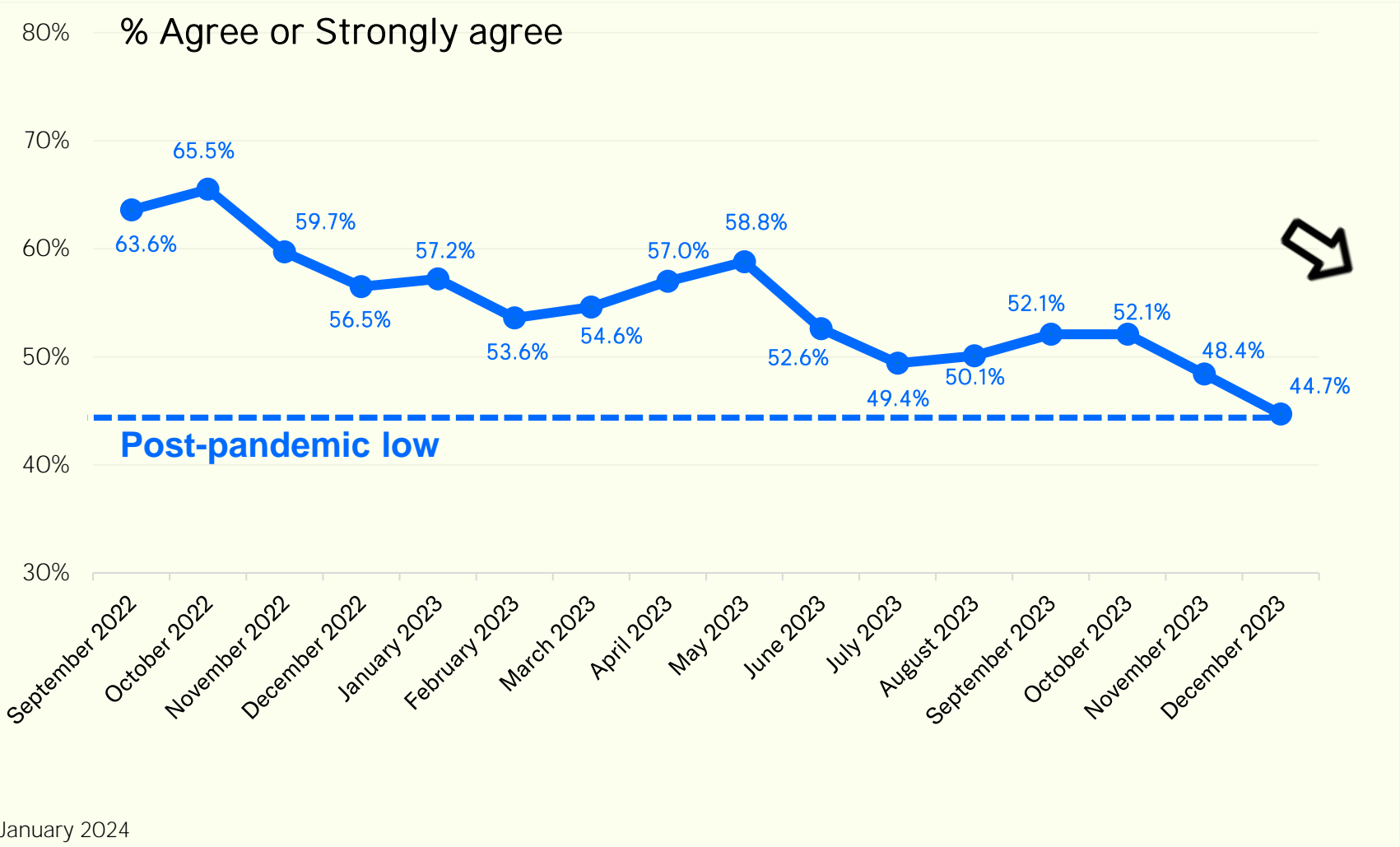
Economic uncertainty continues for many travelers

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



But the majority of American travelers no longer expect a pending recession.

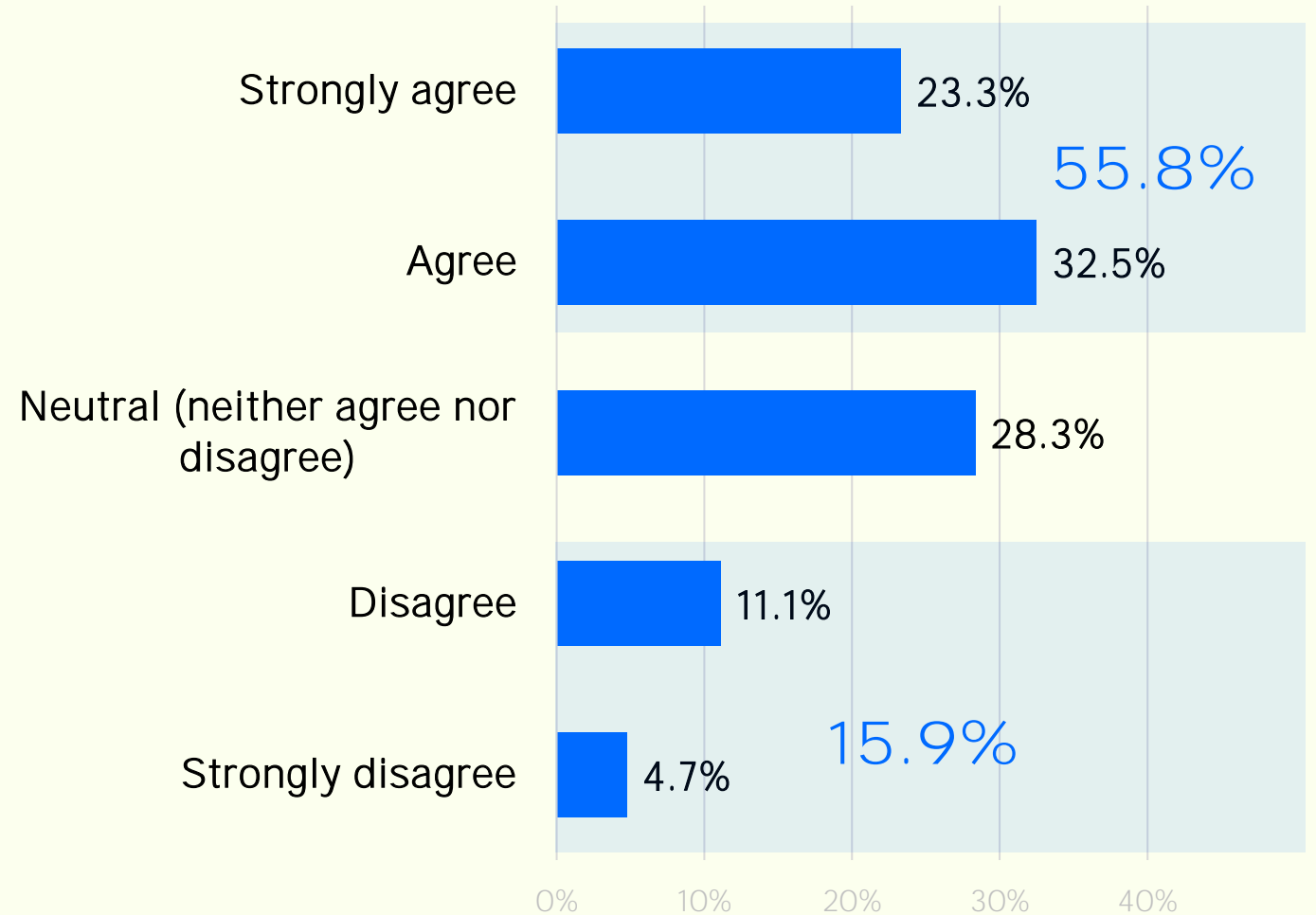
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Spending caution due to recessionary concerns persists.

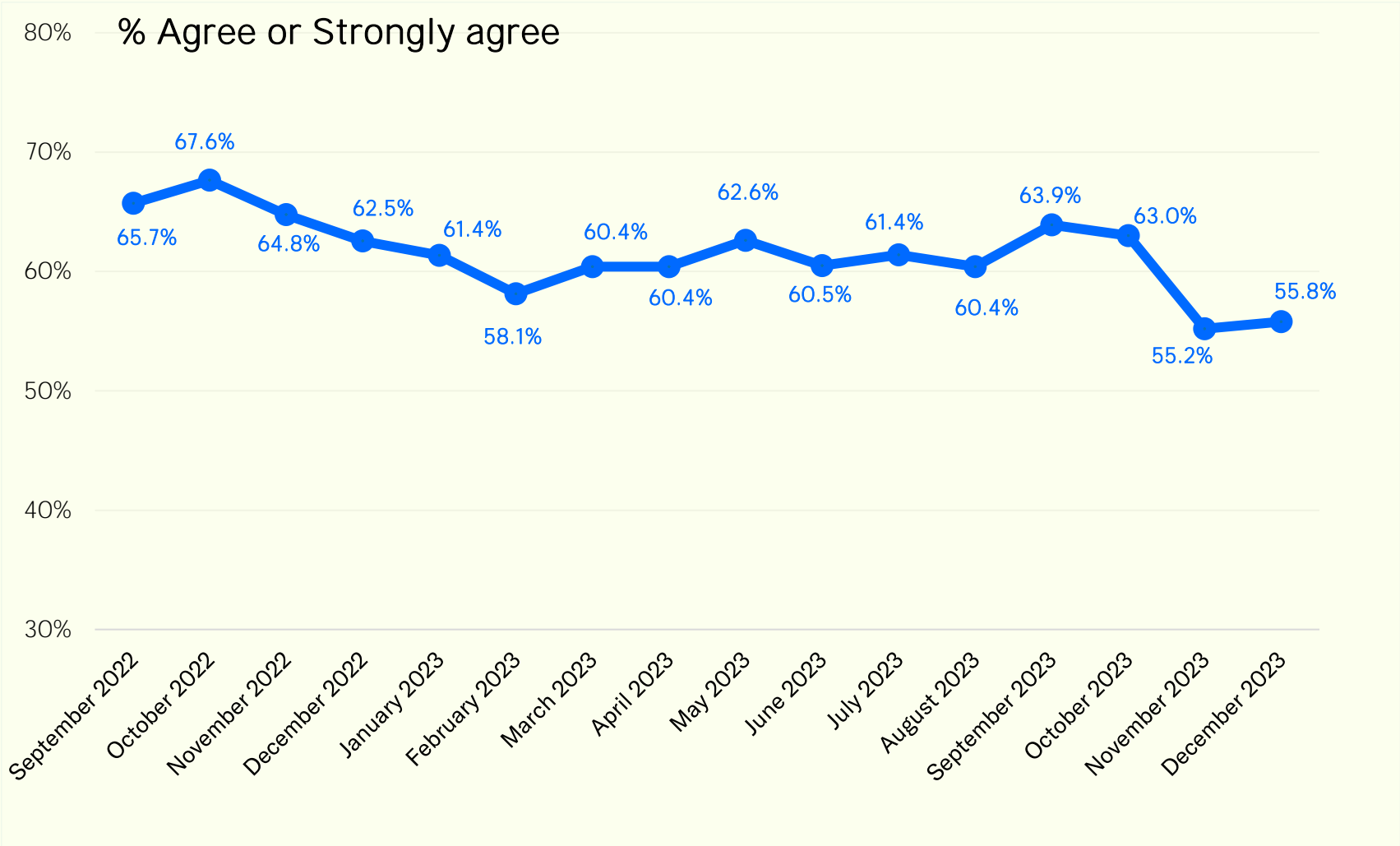
Statement:

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



This spending caution was flat in December.

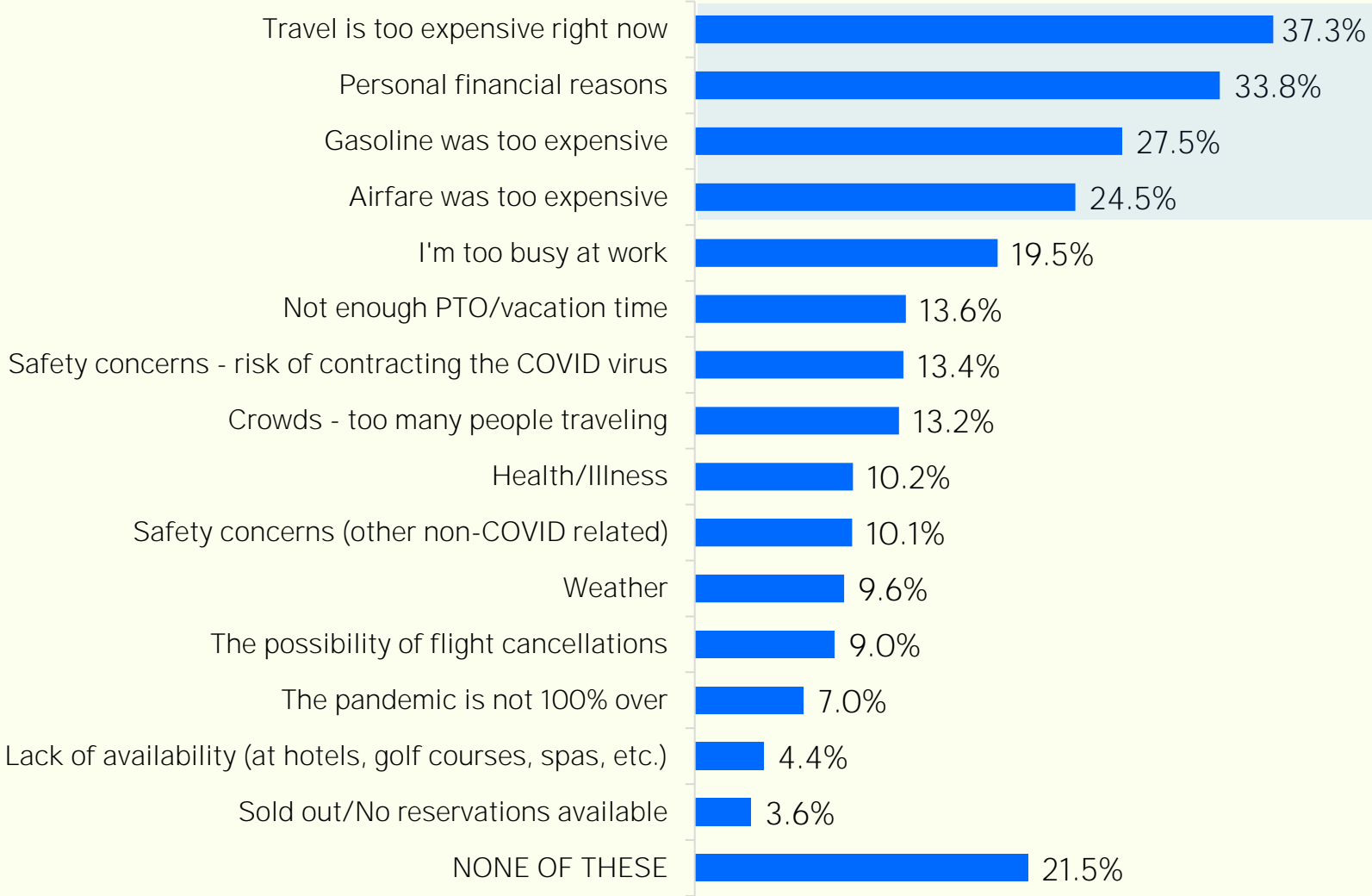
Statement:
Right now, I am being careful with my money
because I'm concerned about an upcoming
recession.



High costs remain the top impediment to travel.

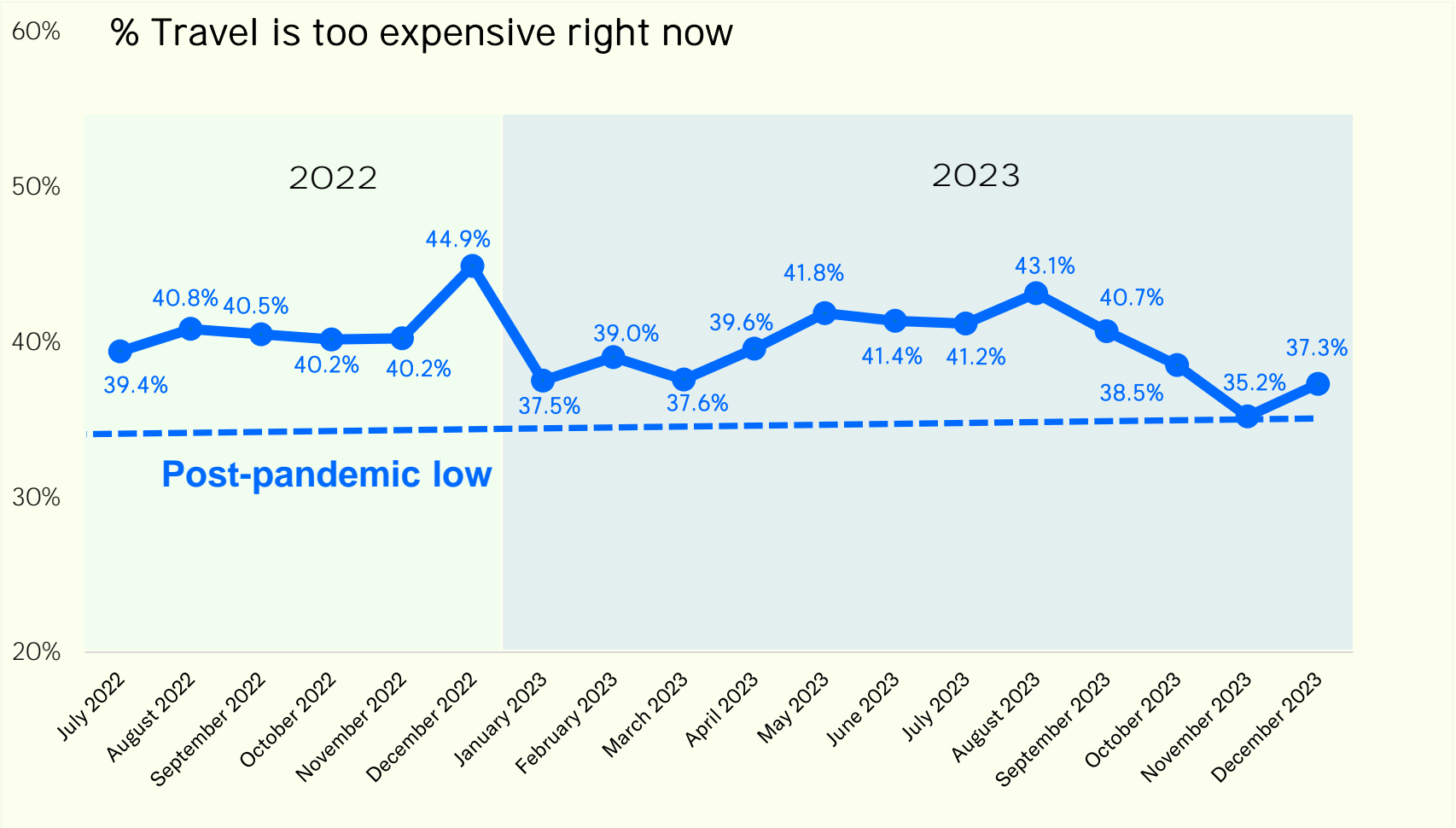
Question:

In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?
(Select all that apply)



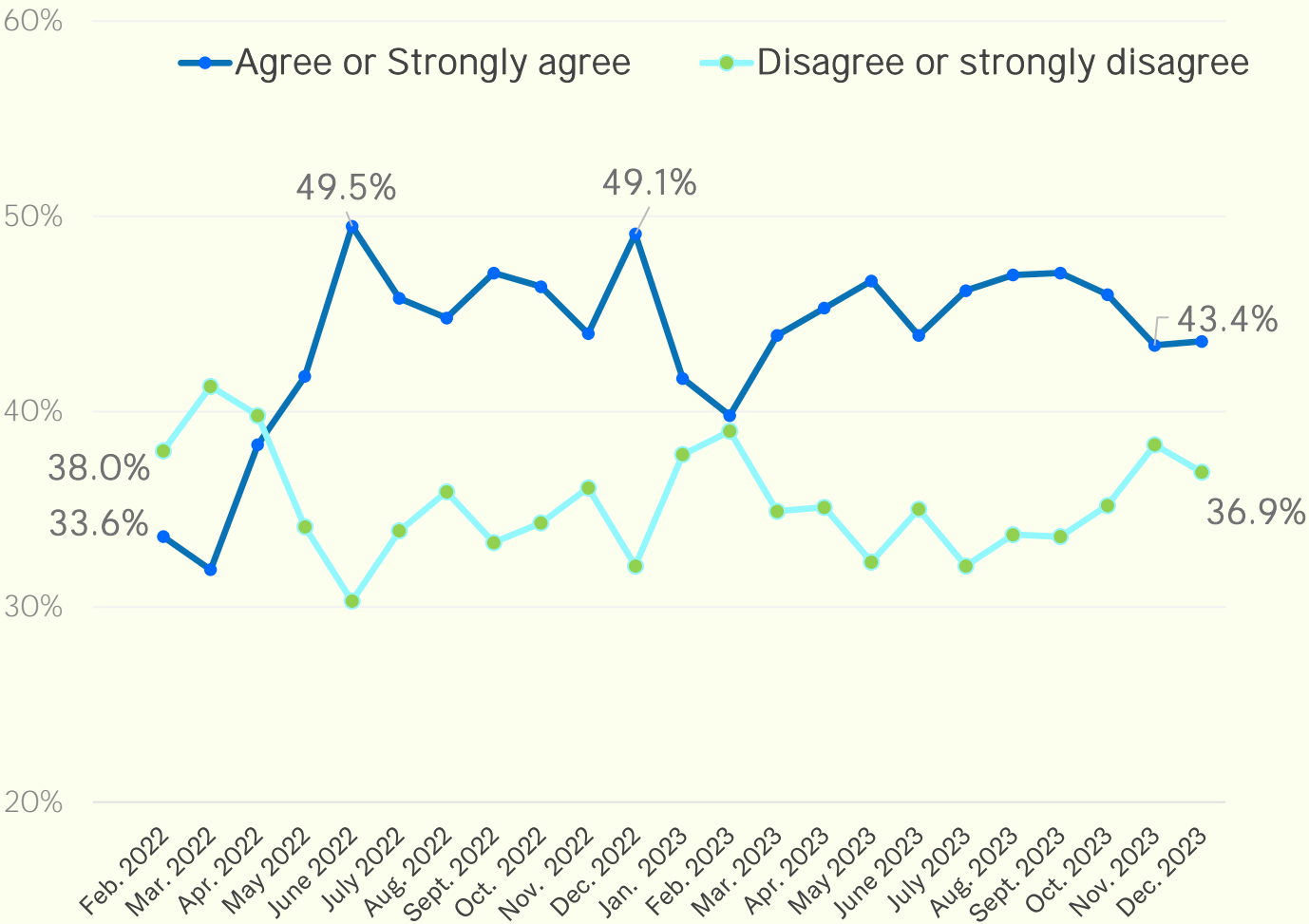
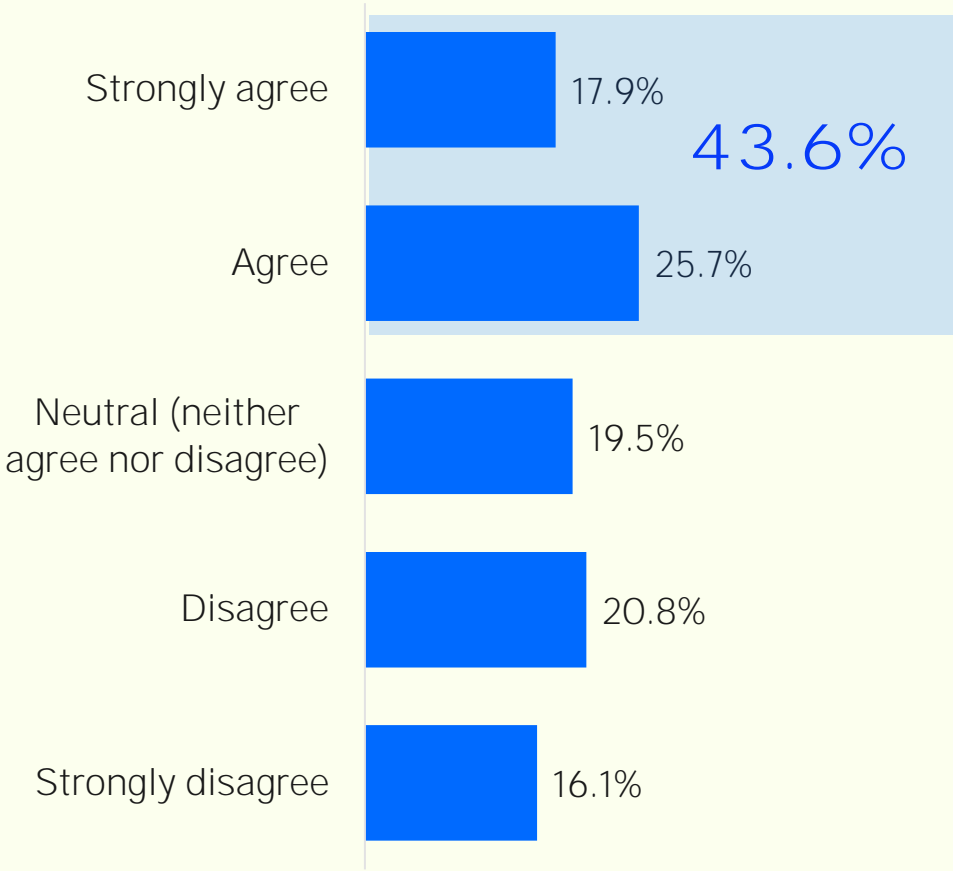
Expense as a deterrent to travel increased at the end of the year.

Question:
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



More said travel prices kept them from traveling last month.

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

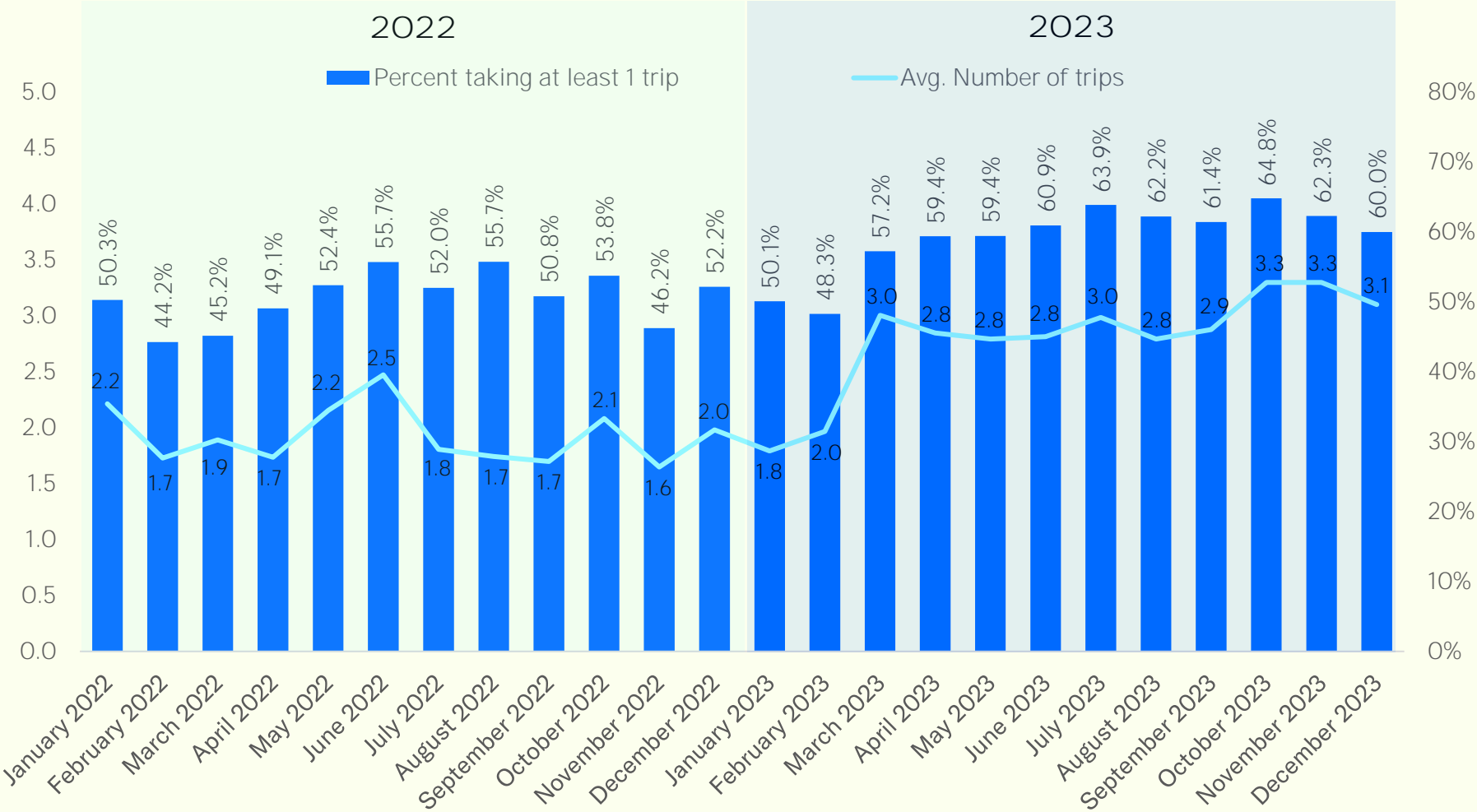


Travel volume continues to be robust despite some weakness in the final month of the year.



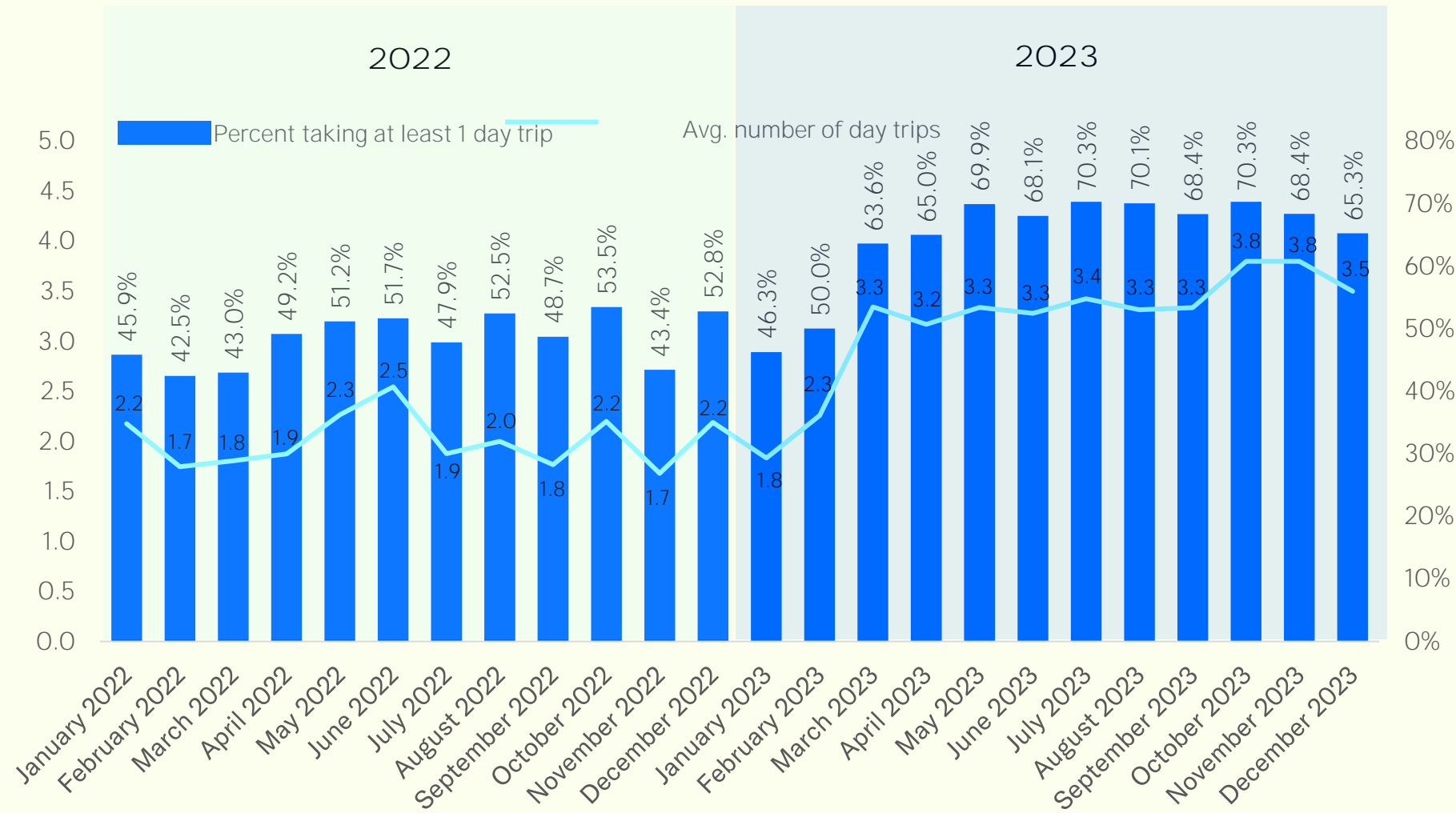
Overnight trip volume remains robust.

Question:
How many OVERNIGHT trips of each
type have you taken in the PAST
MONTH?



Day trip volume has been very strong this year.

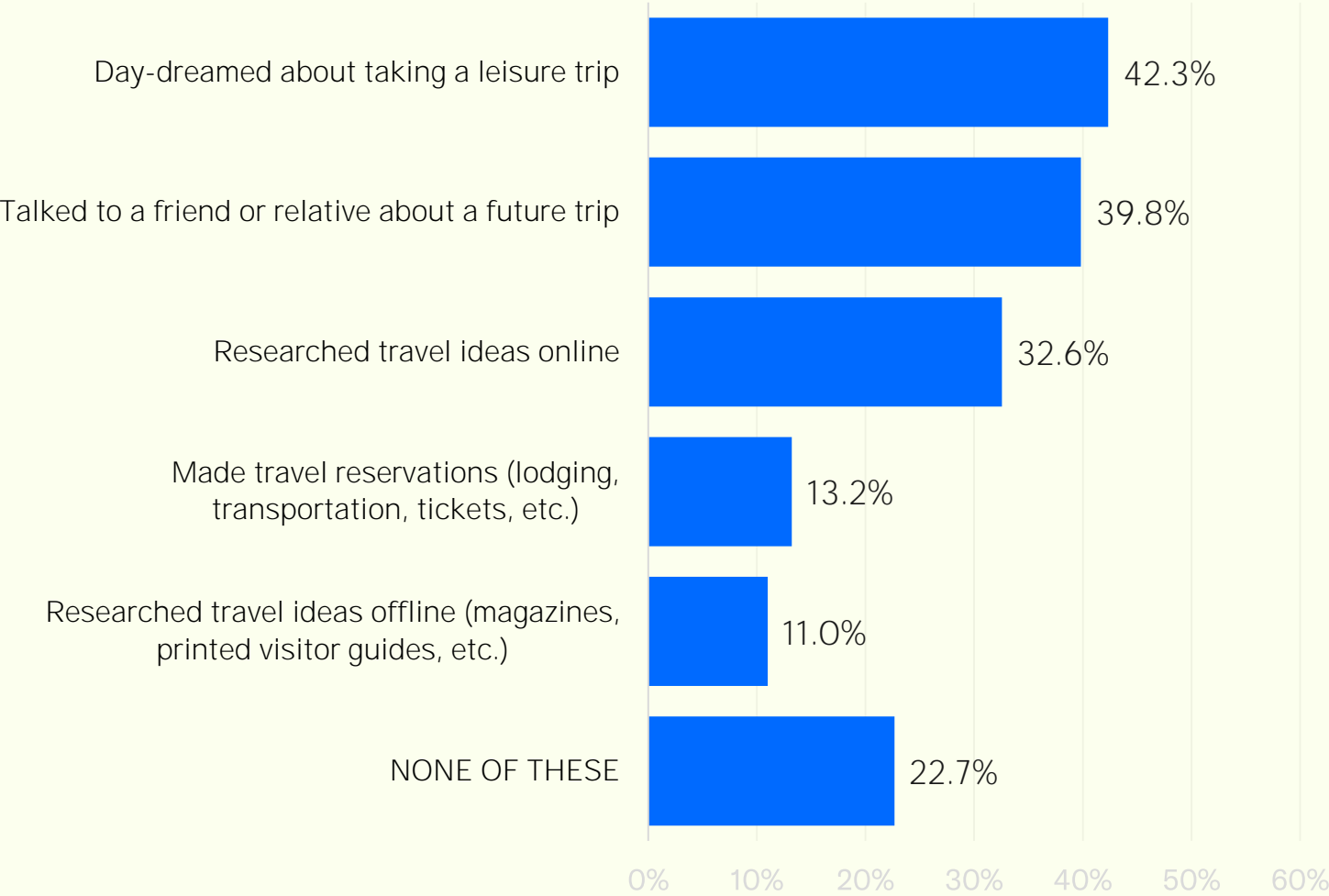
Question:
How many DAY TRIPS (i.e., no overnight stay) of each type have you taken in the PAST MONTH?



Americans continue to dream, plan and book travel at strong rates.

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

In the PAST WEEK I have _____



Looking Forward



Future Partners



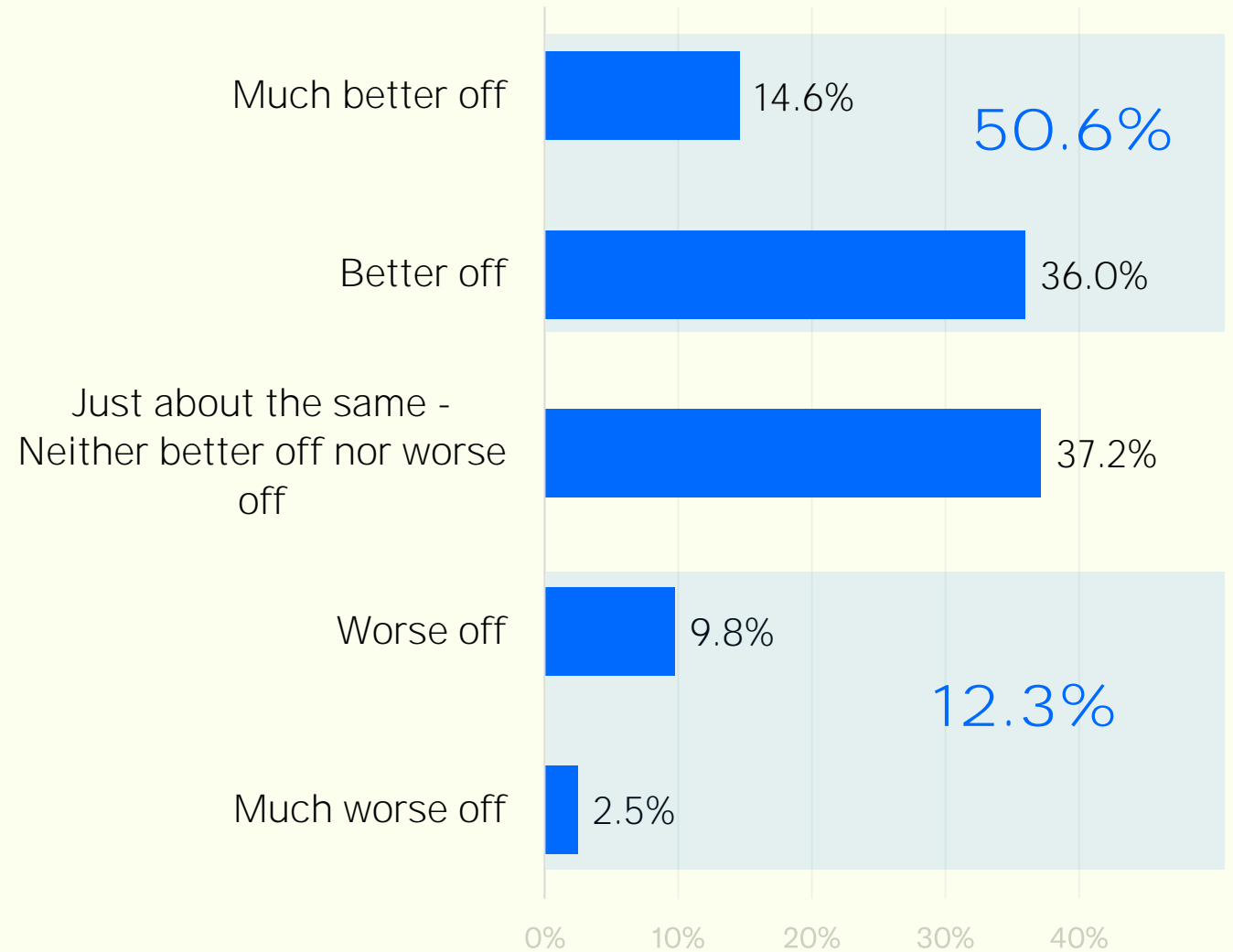
Travelers are optimistic about their finances, and in spite of recent weakness, they continue to hold high levels of excitement for travel.



Most travelers maintain a sense of optimism about their future finances.

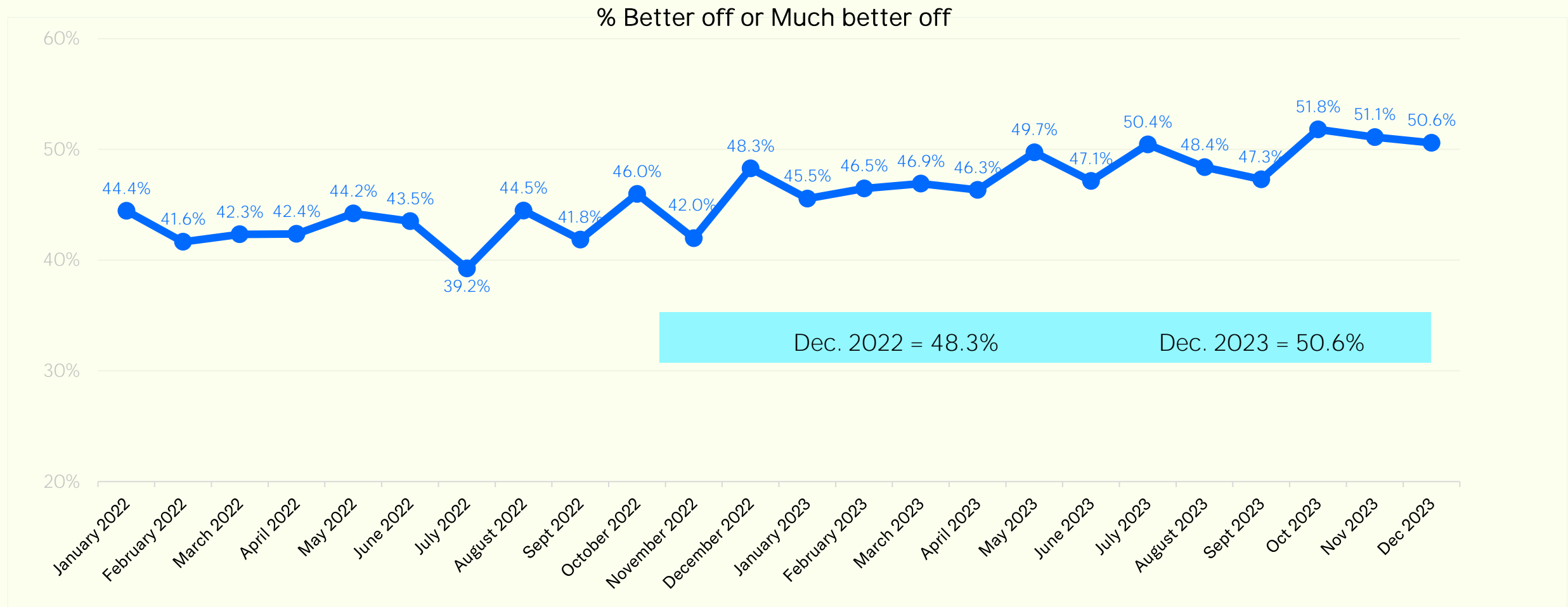
Question:

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?



Financial optimism is up slightly from last year.

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?

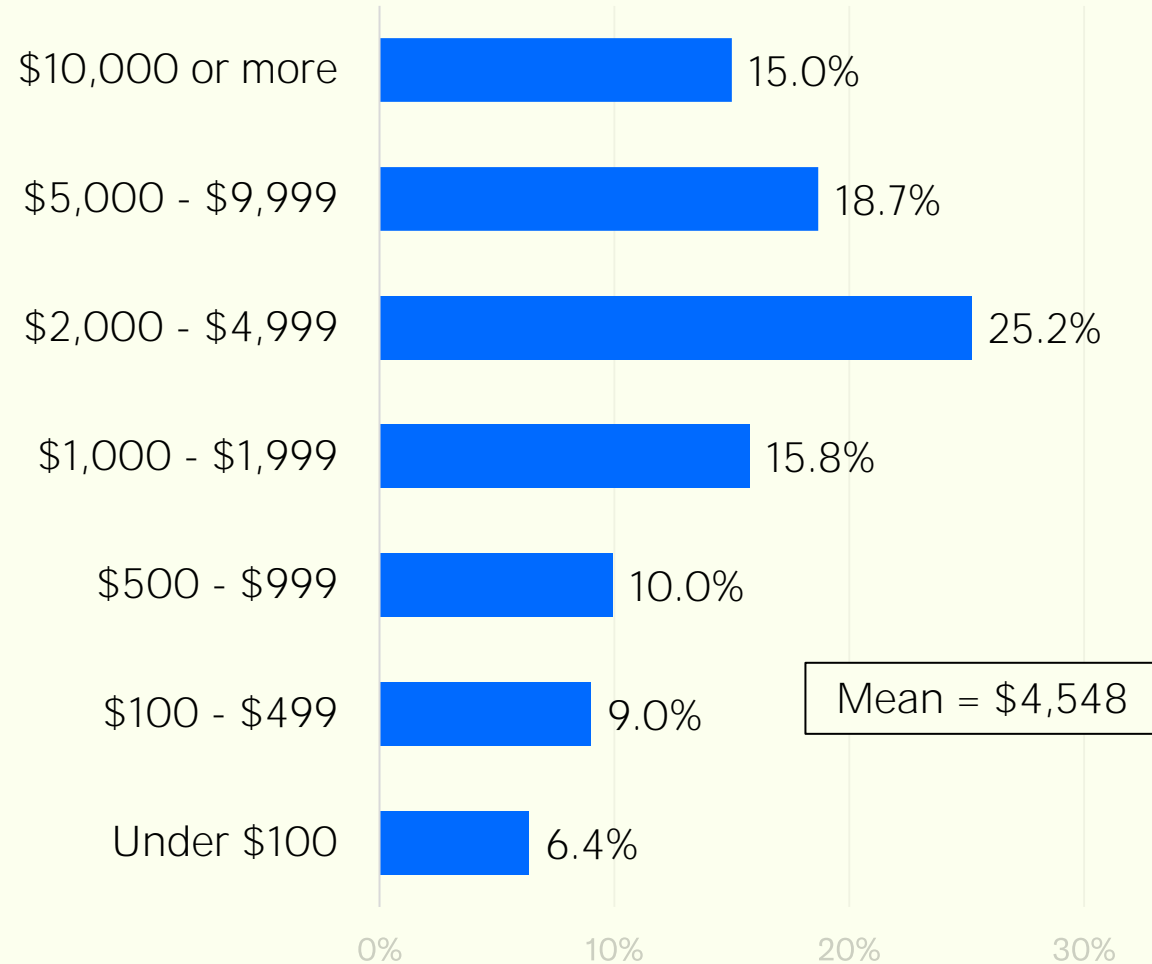


Travel budgets improved dramatically this month.

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?

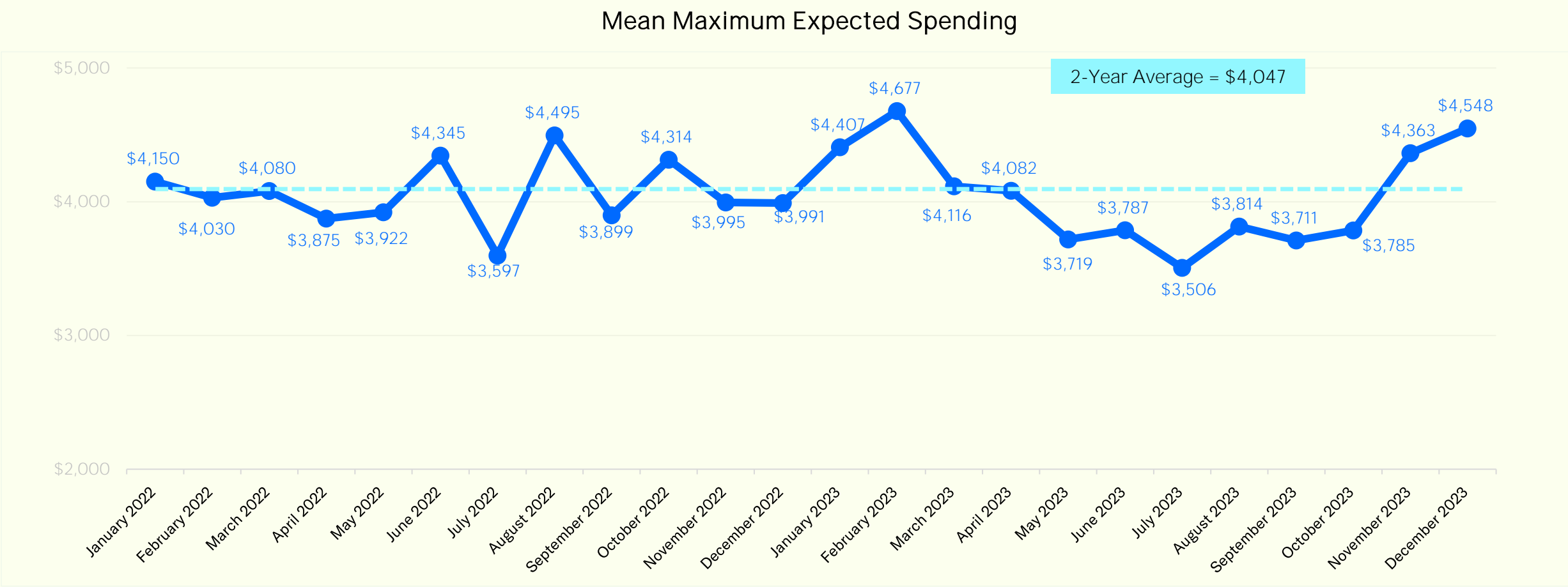
Maximum I would spend on leisure travel (next 12 months):



Travel budgets increased at the end of the year.

Question:

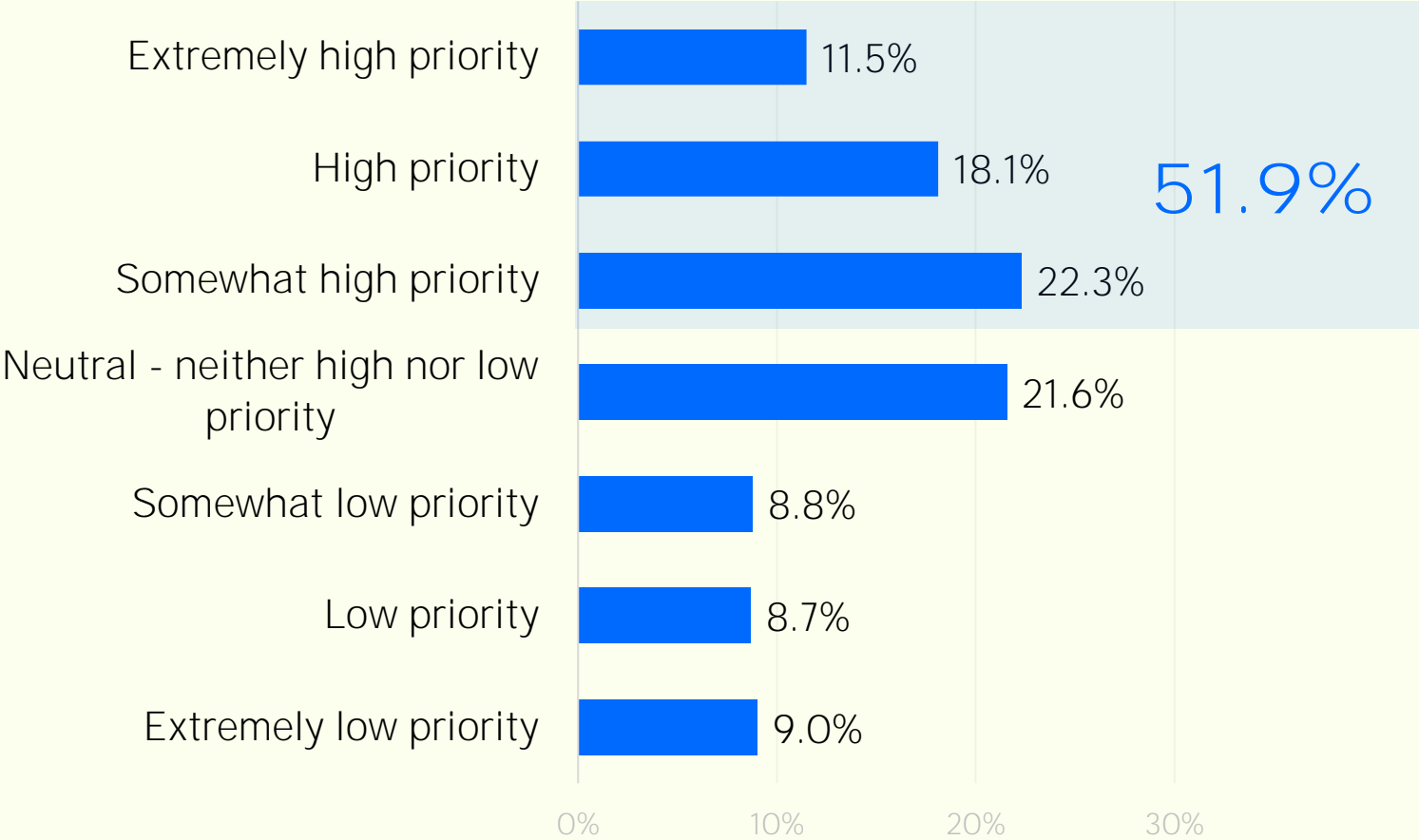
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



52% intend to make leisure travel a spending priority in the next three months.

Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n)

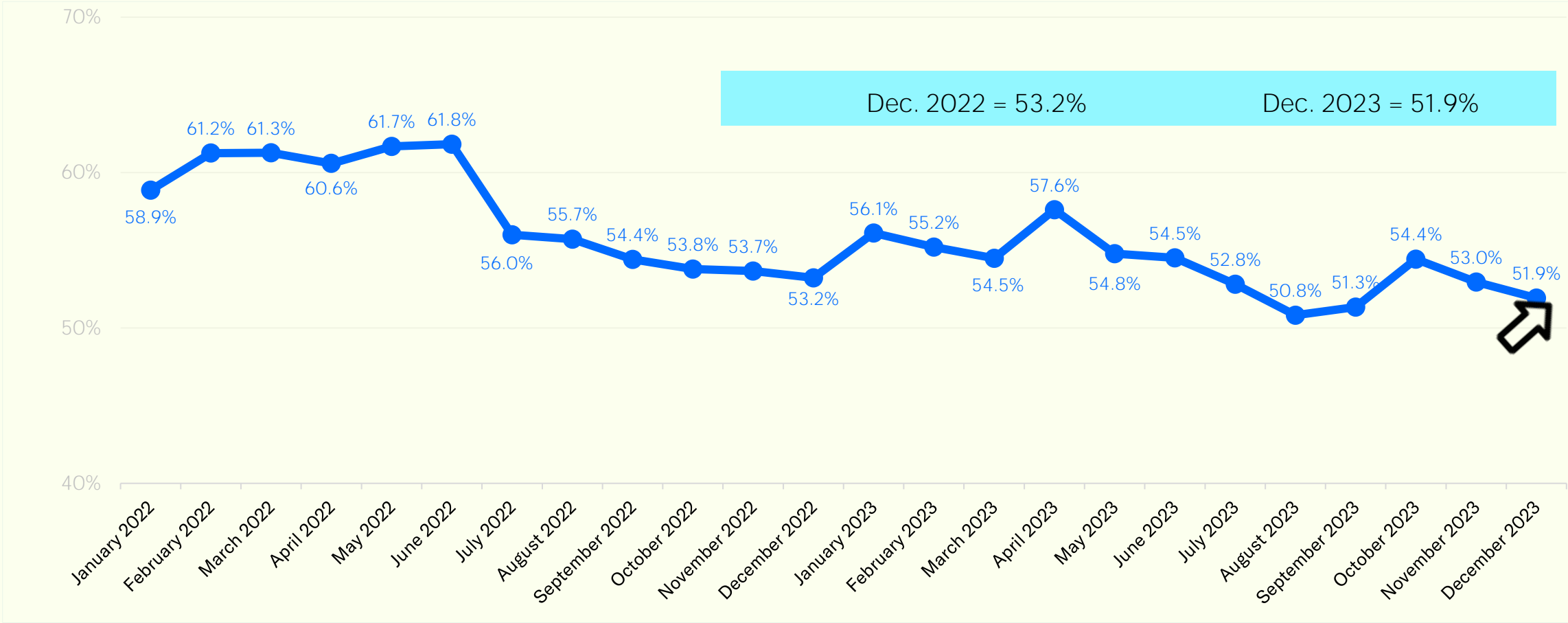


...down slightly compared to last year.

Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.

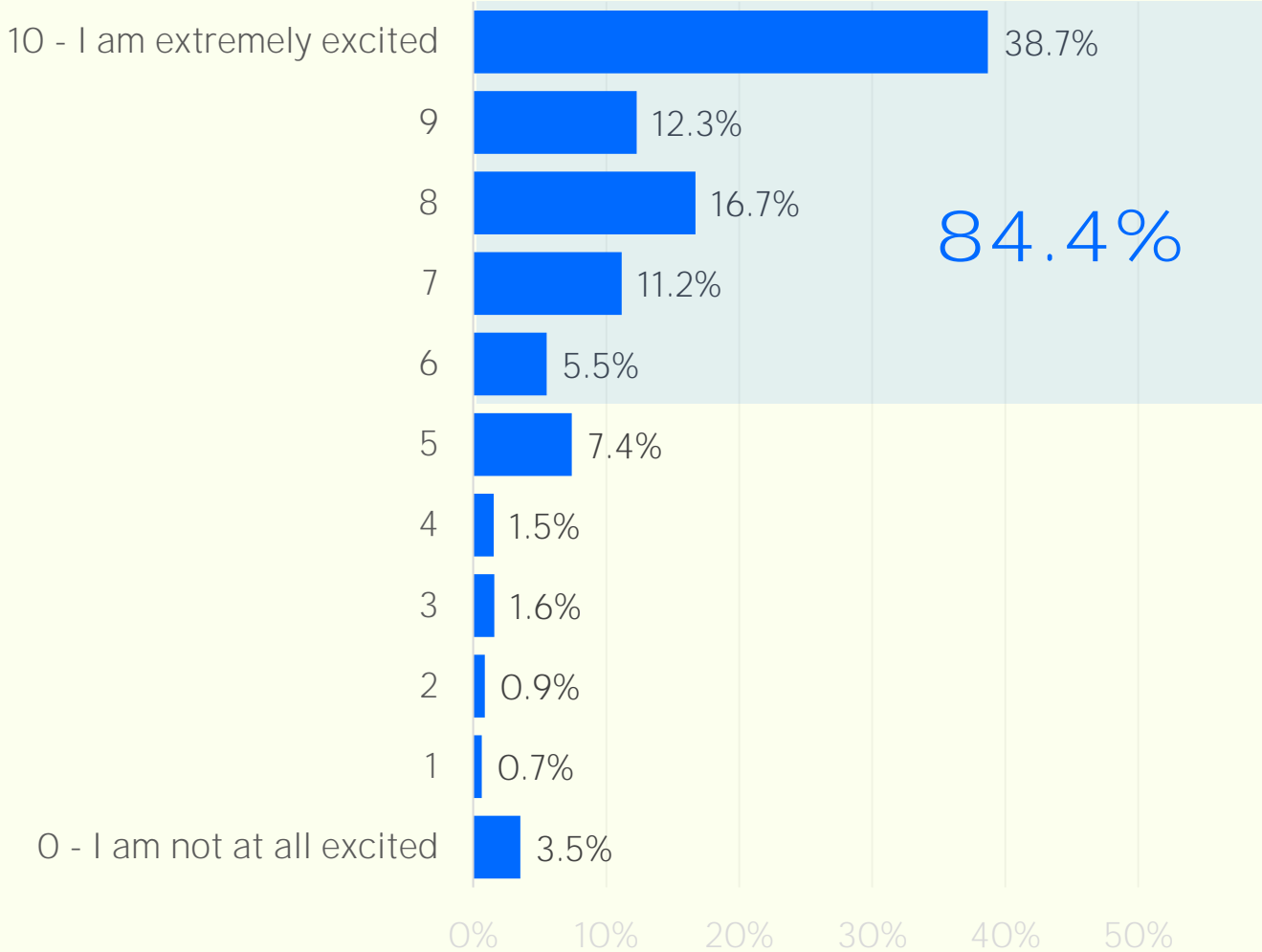
% Top 3 Box Score



Excitement for travel remains elevated.

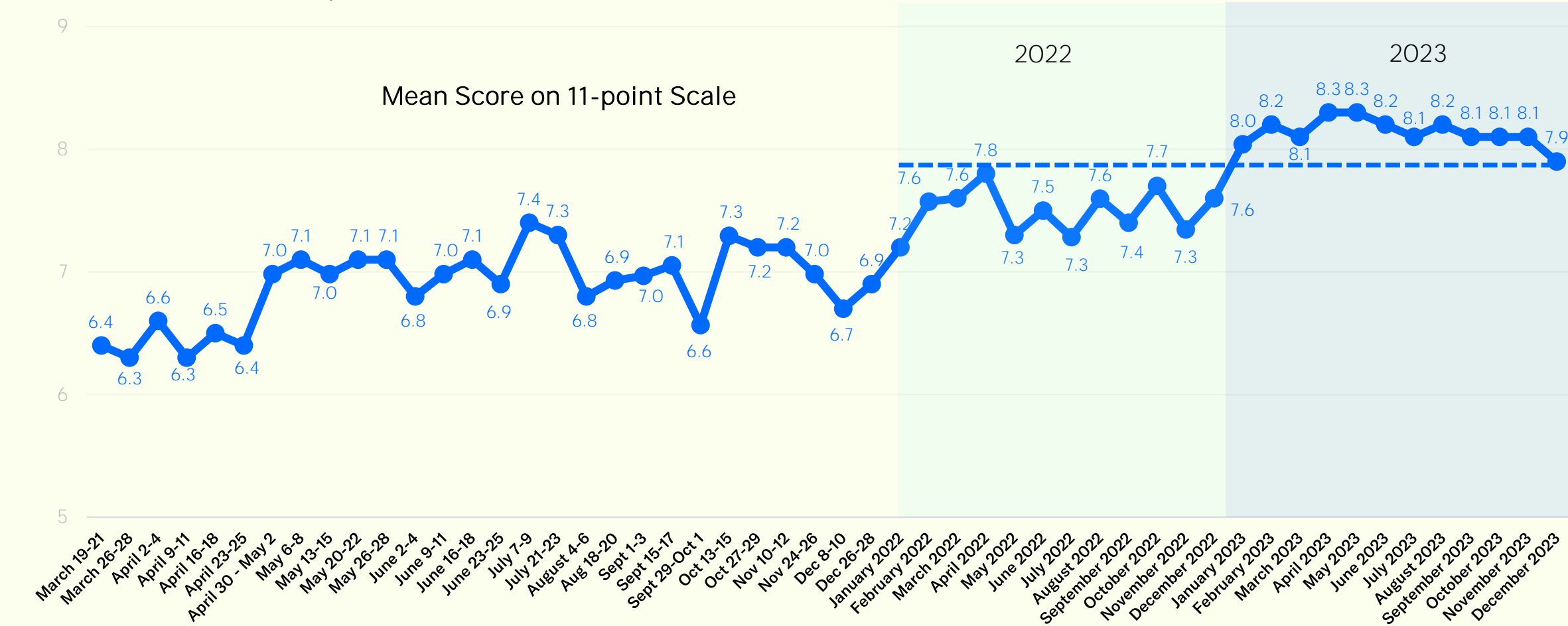
Question:

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



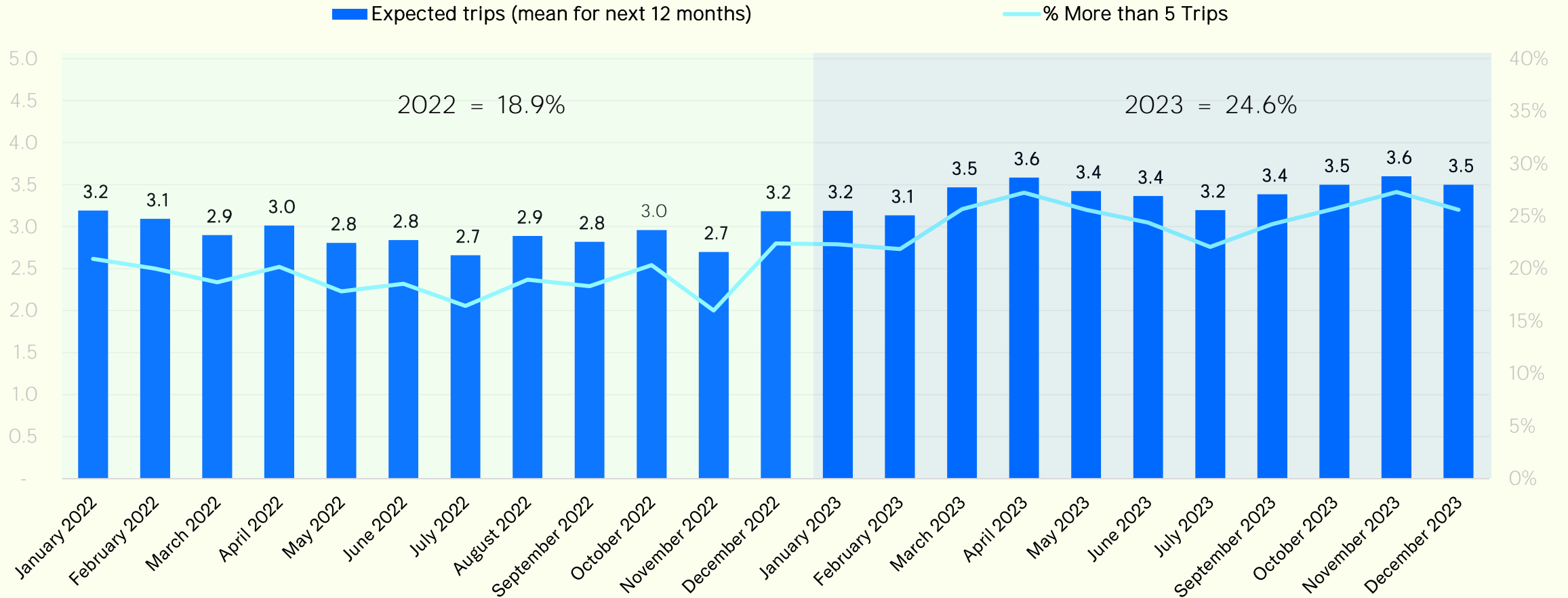
Excitement has diminished from record levels set in 2023 but remains high.

Question:
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Travel expectations continue to be strong.

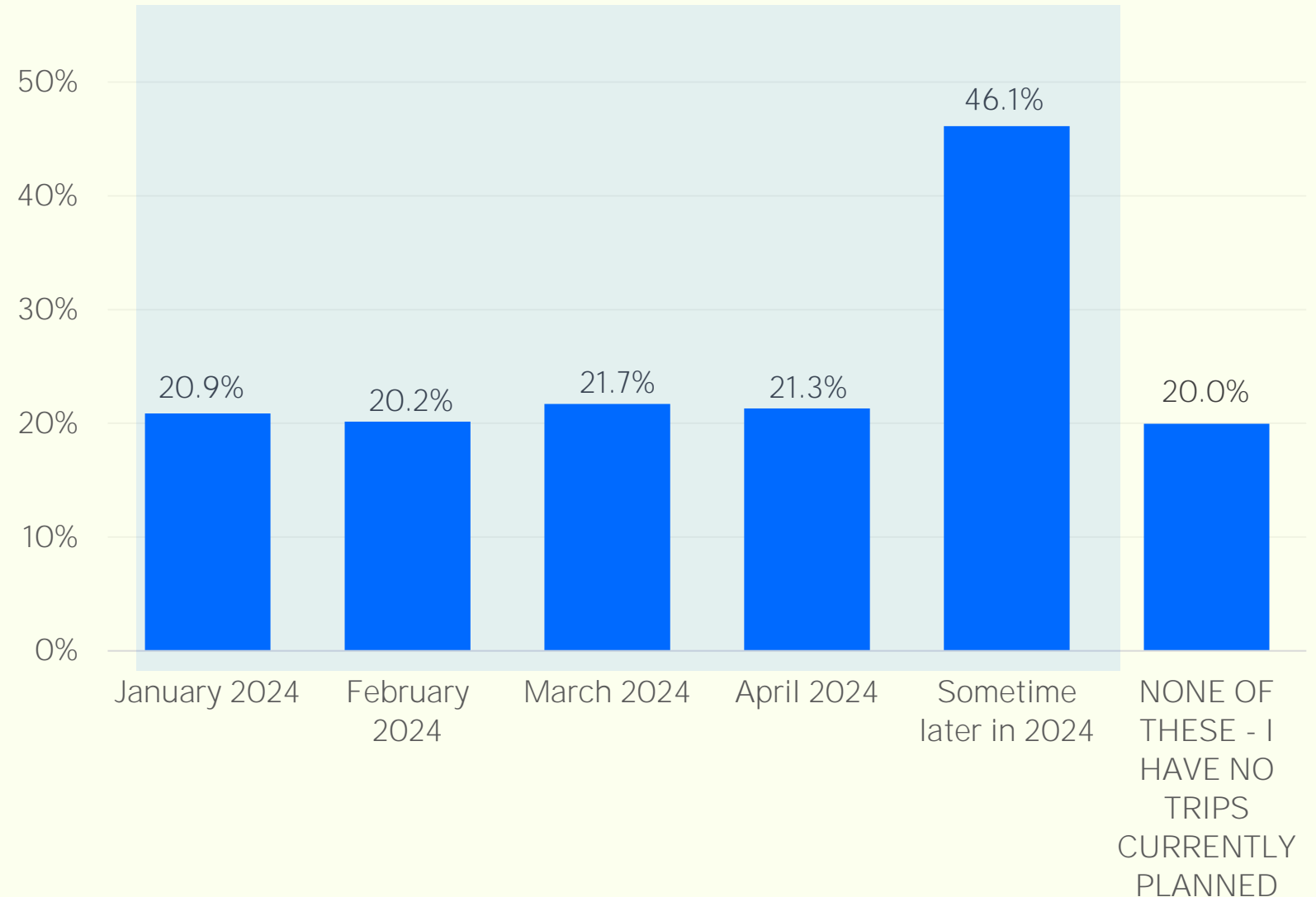
Question:
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



80% of American travelers have existing plans for future trips.

Question:

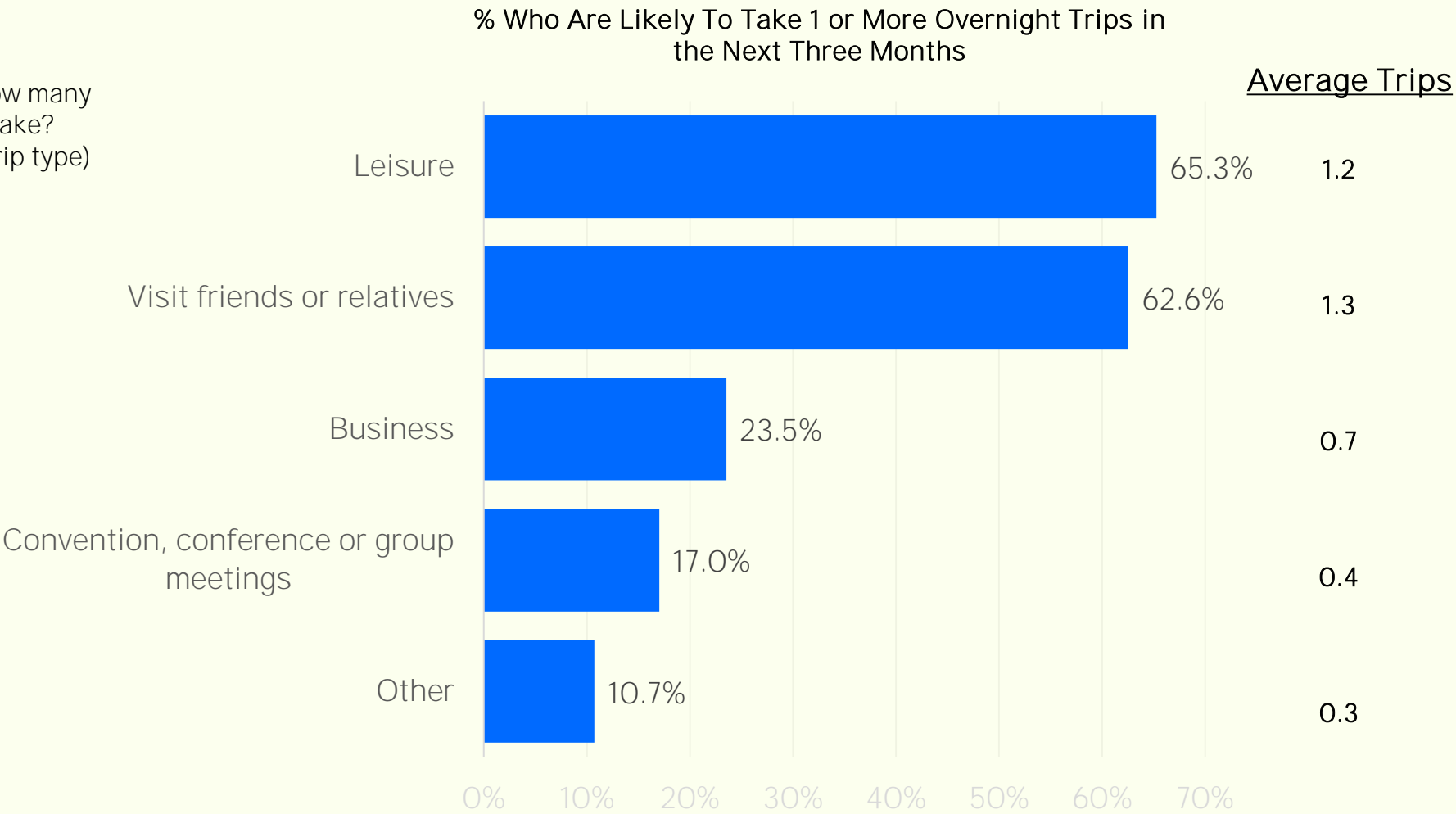
In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



American travelers anticipate taking 3.9 total trips in the next 3 months.

Question:

In the NEXT THREE (3) MONTHS, how many of each type of trip are you likely to take?
(Select the correct number of each trip type)



American travelers have more than 15 days available for leisure travel in the next 12 months.

Question:

Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

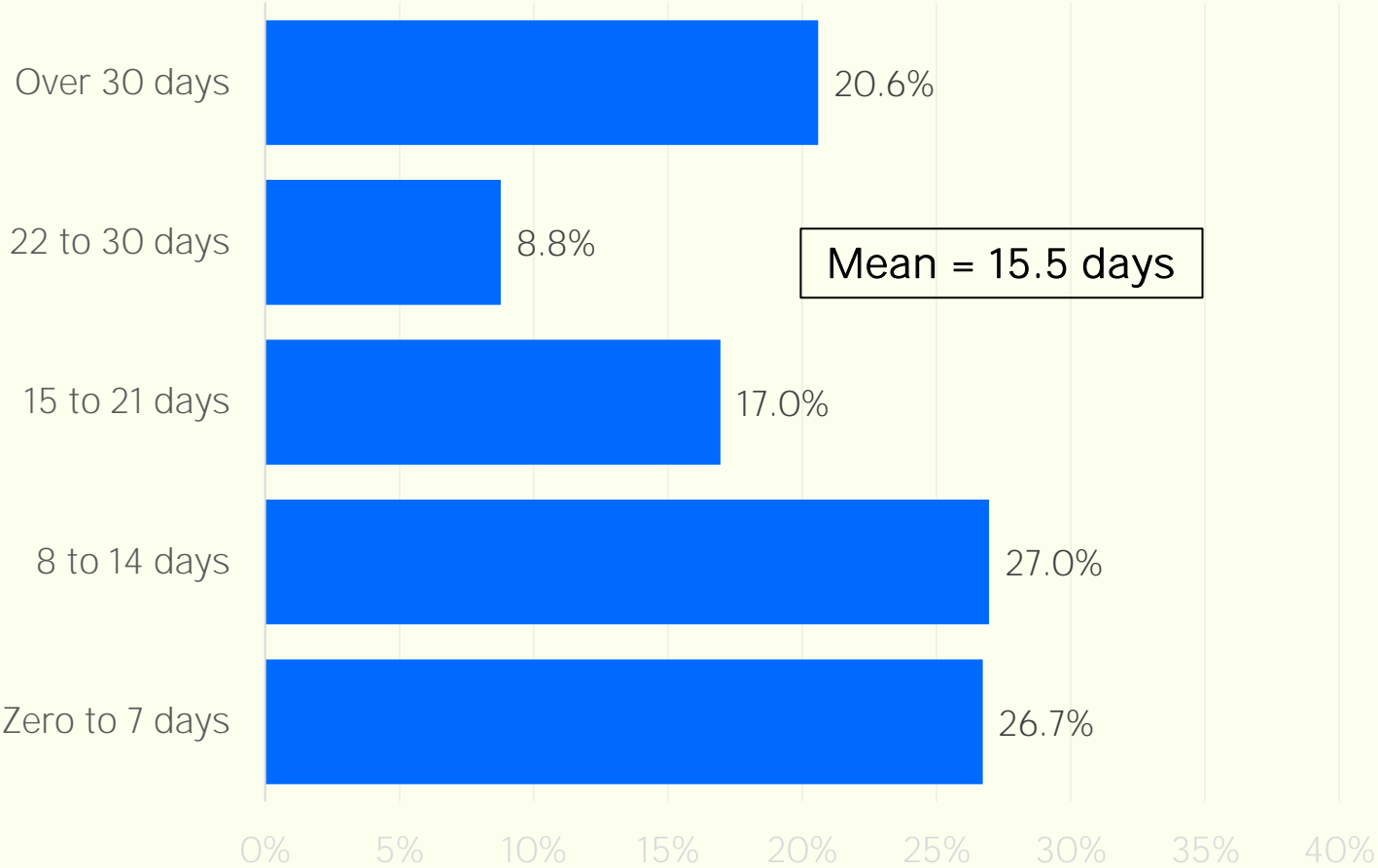
Mean

Gen Z = 11.9 days

Millennials = 12.7 days

Gen X = 14.1 days

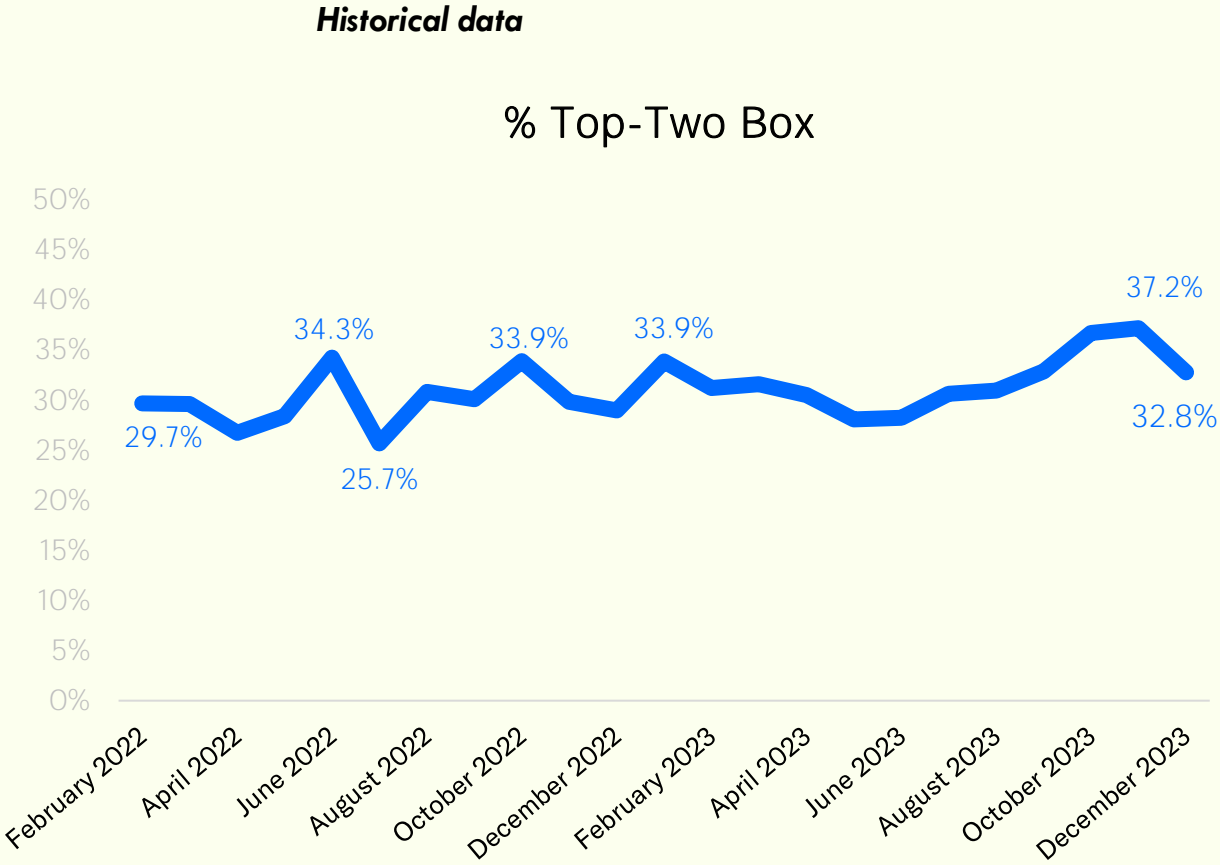
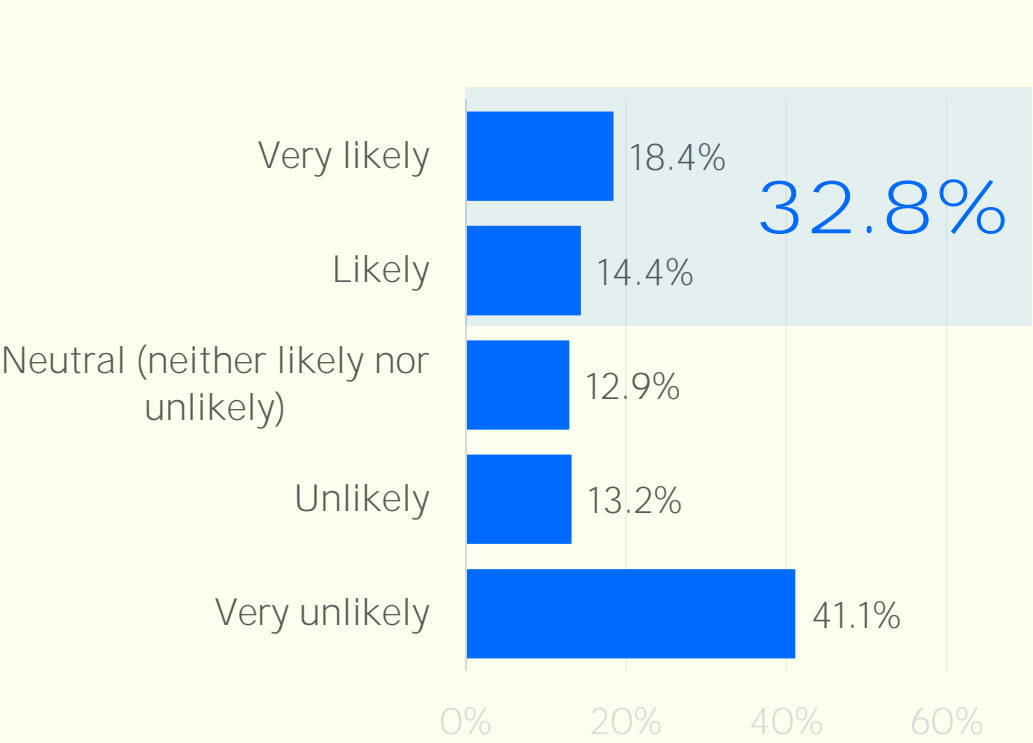
Boomer or older = 20.5 days



Will many American travelers still
head out on international trips?

International travel expectations remain at recent average levels.

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



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.

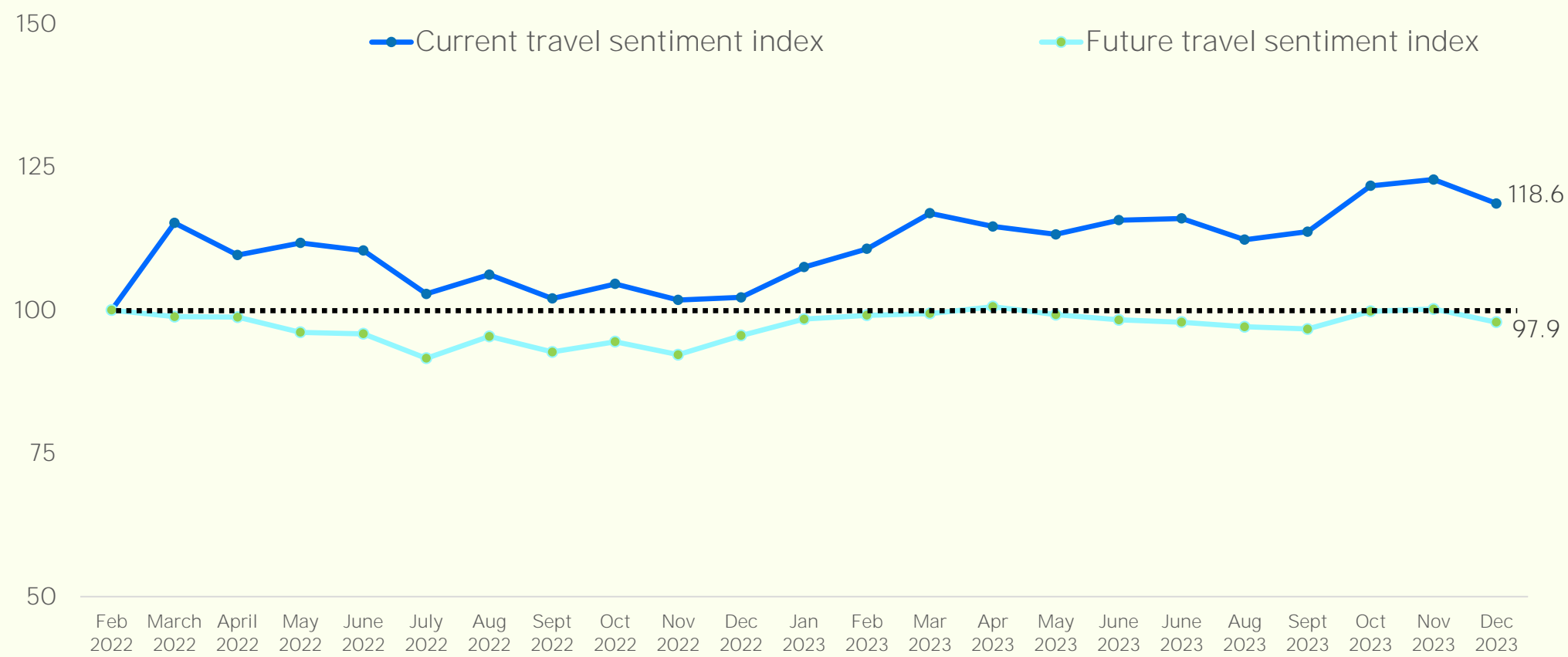
Current Travel Sentiment Index

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

The current travel sentiment index dipped slightly this month.



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

Marketing Travel

Social Media



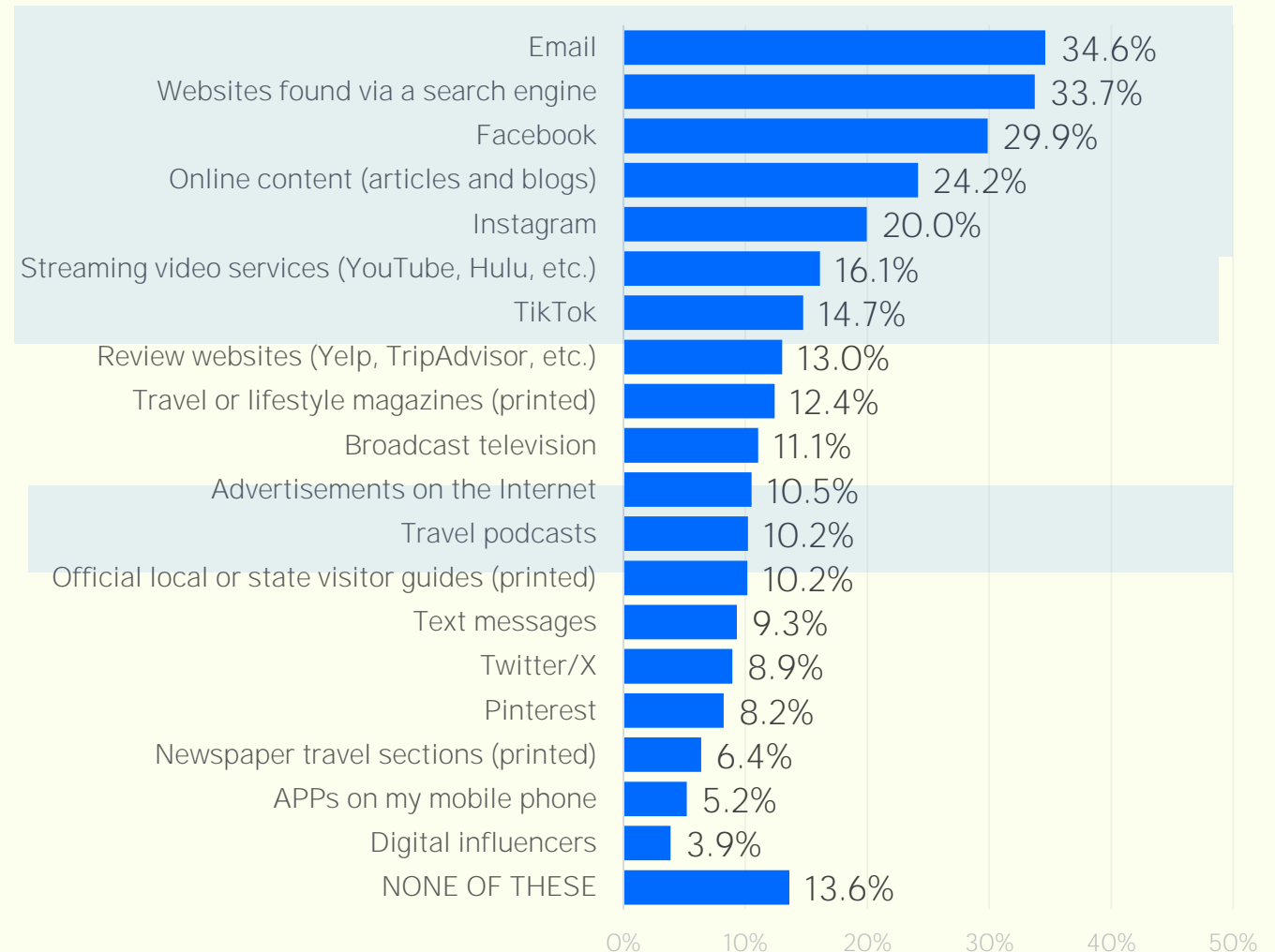
Future Partners



Email, search continue to dominate as travelers' preferred marketing channels.

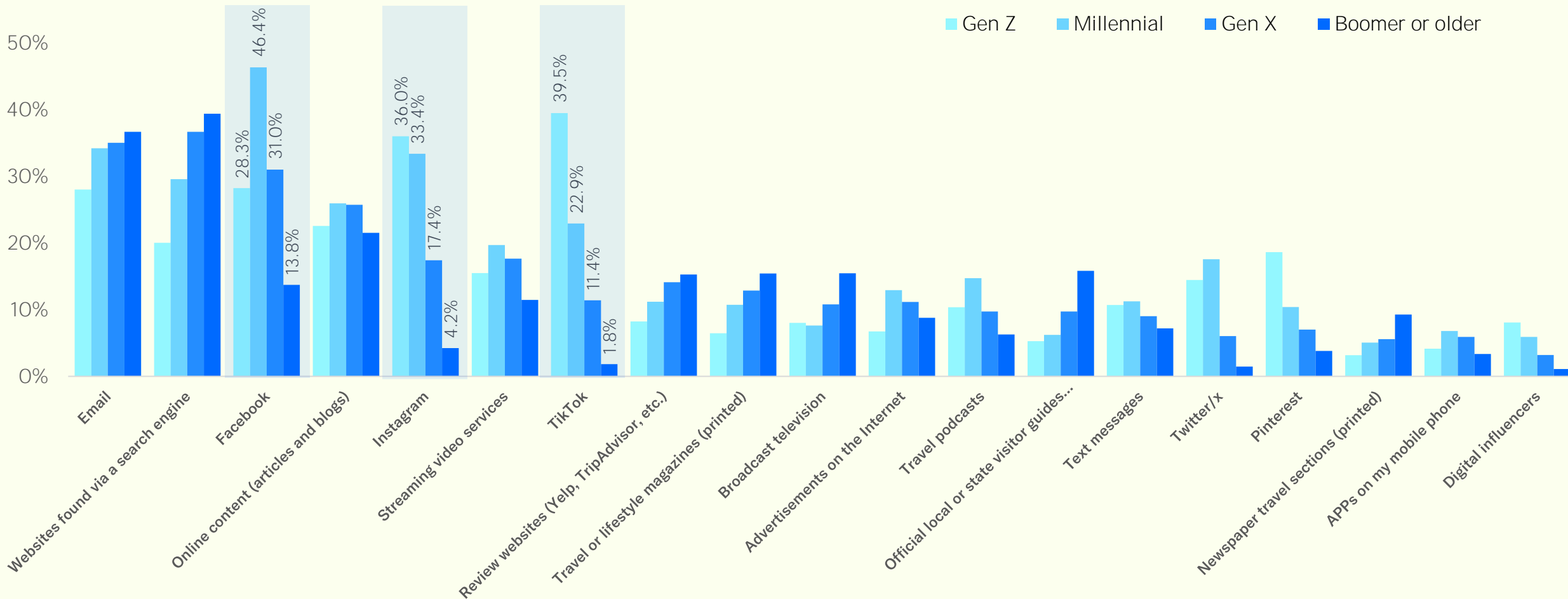
Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



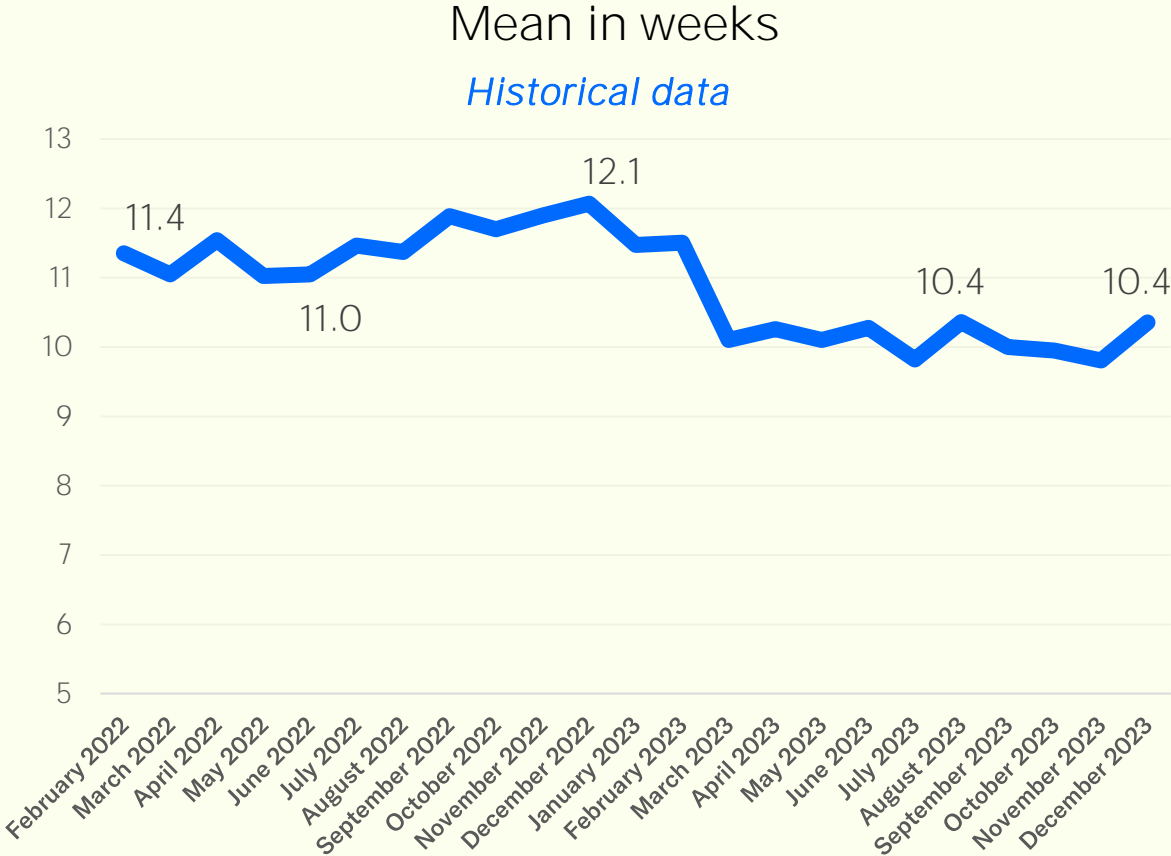
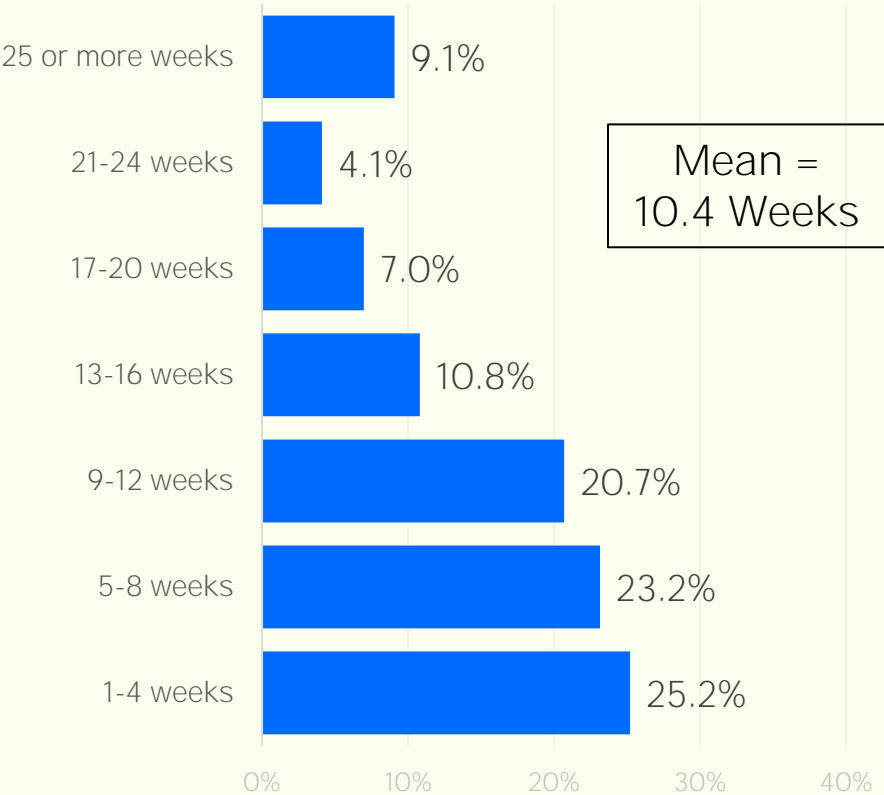
Social media has the strongest pull on younger travelers

Question: Please think about how travel destinations could best reach you with their messages right now.
Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



Travelers continue to stick to shorter planning windows.

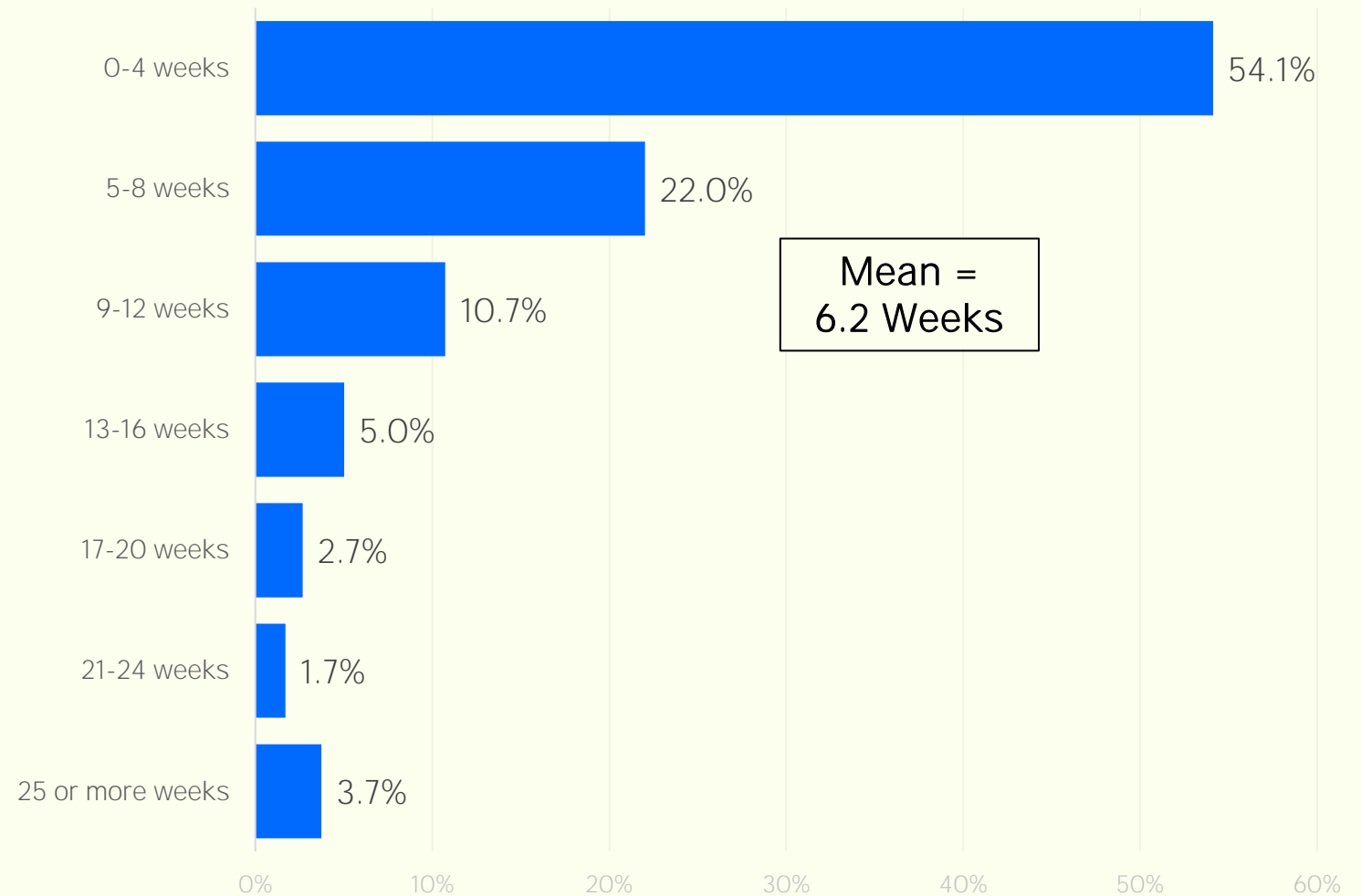
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



Their most recent overnight trip had an even shorter average planning window.

Question:

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





Travel Nostradamus



Crowdsourcing Predictions for Travel in 2024

February Livestream
Registration



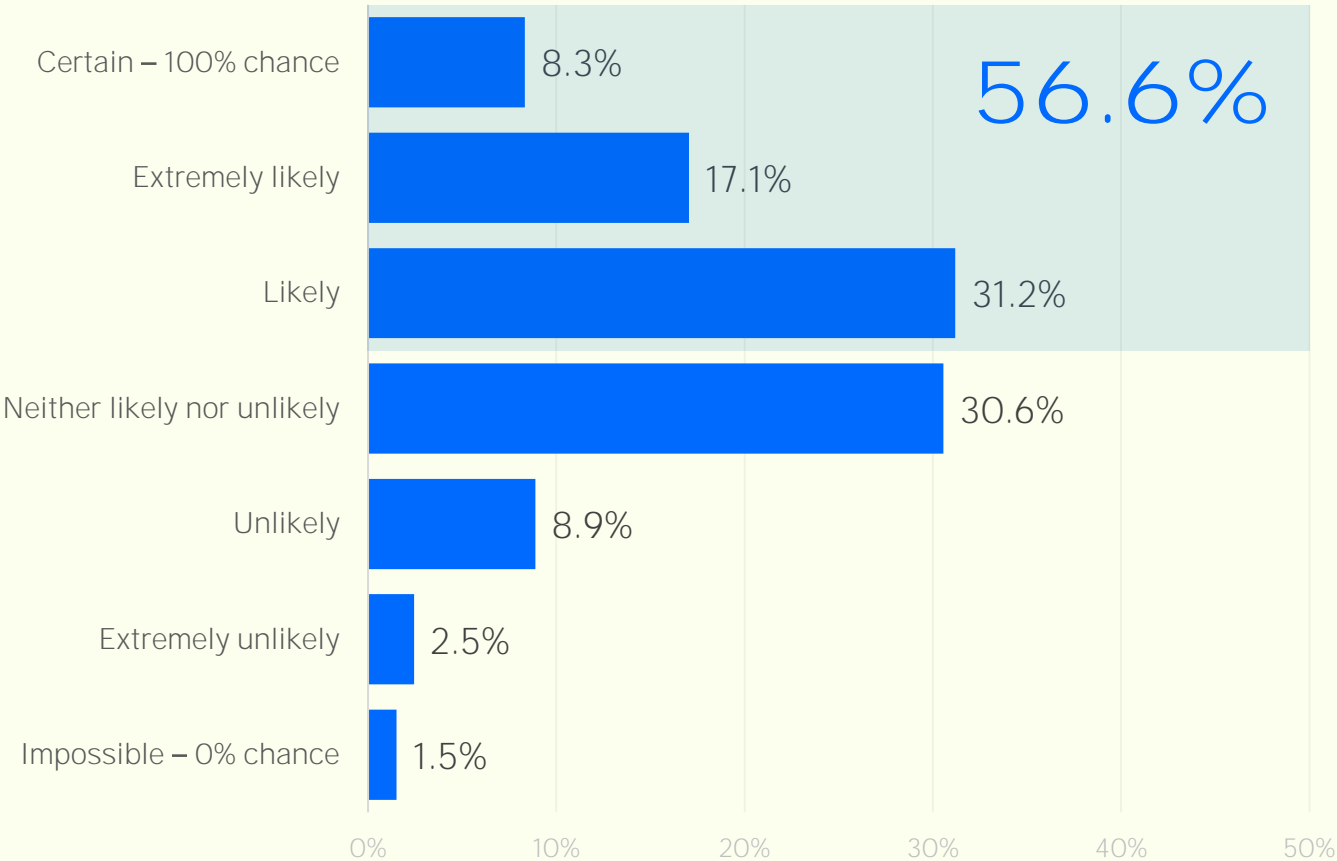


Statement:

Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)

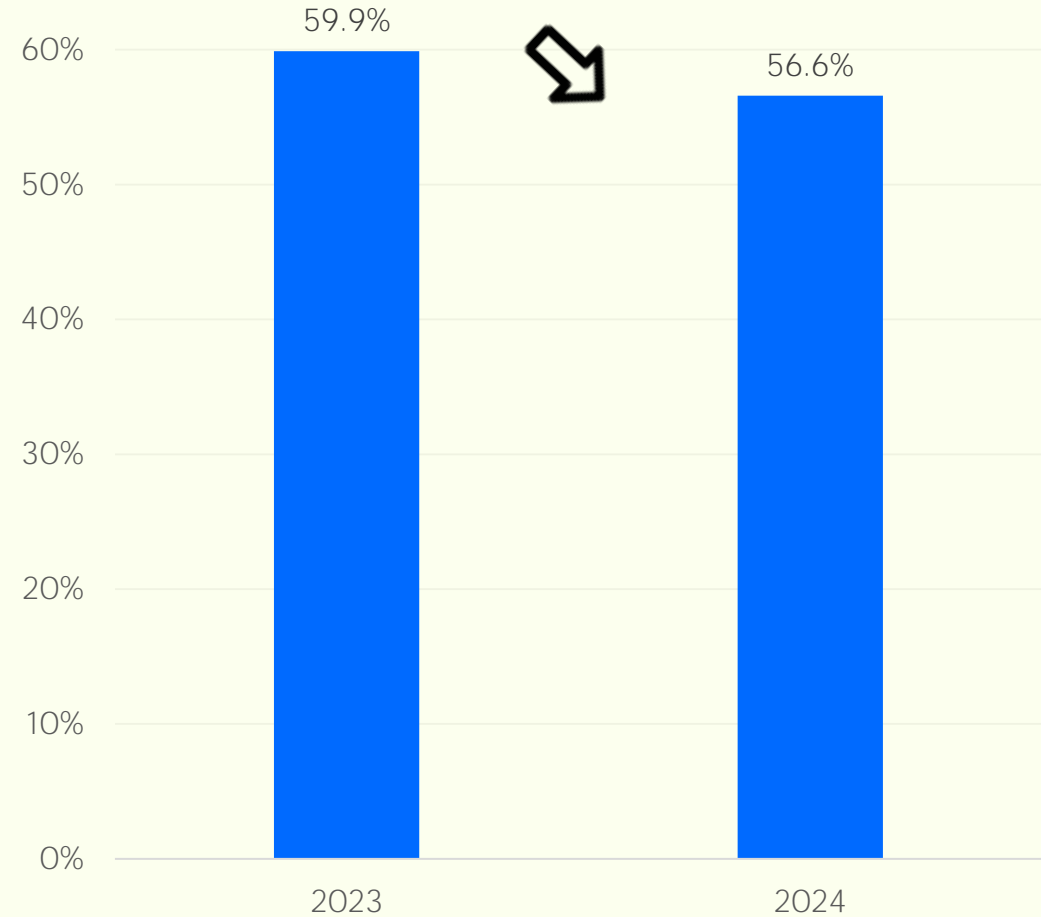
A majority of travelers feel domestic travel will become more frustrating.

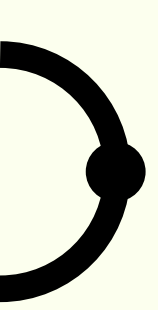
Question:
Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)



Statement:

Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)



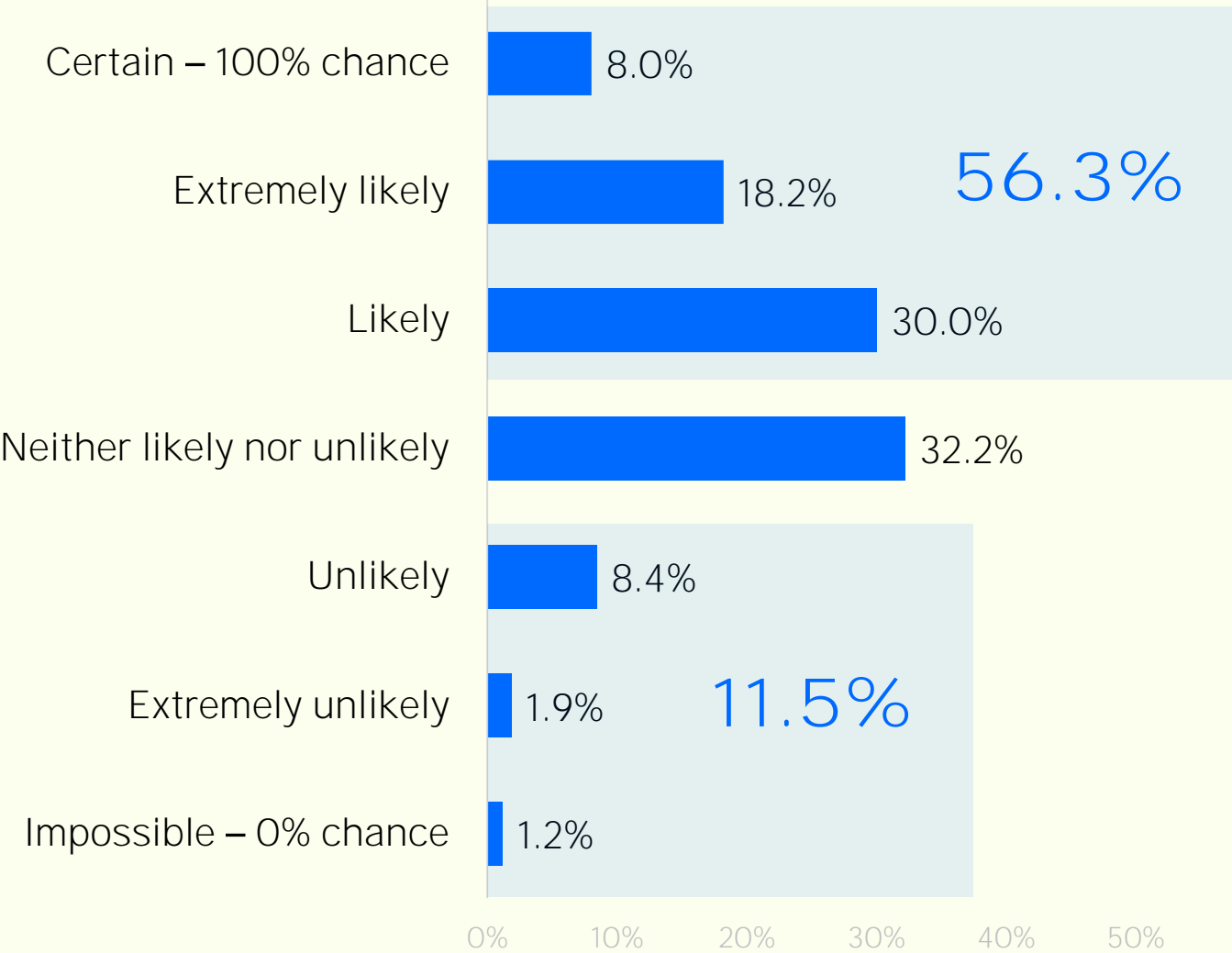


Statement:

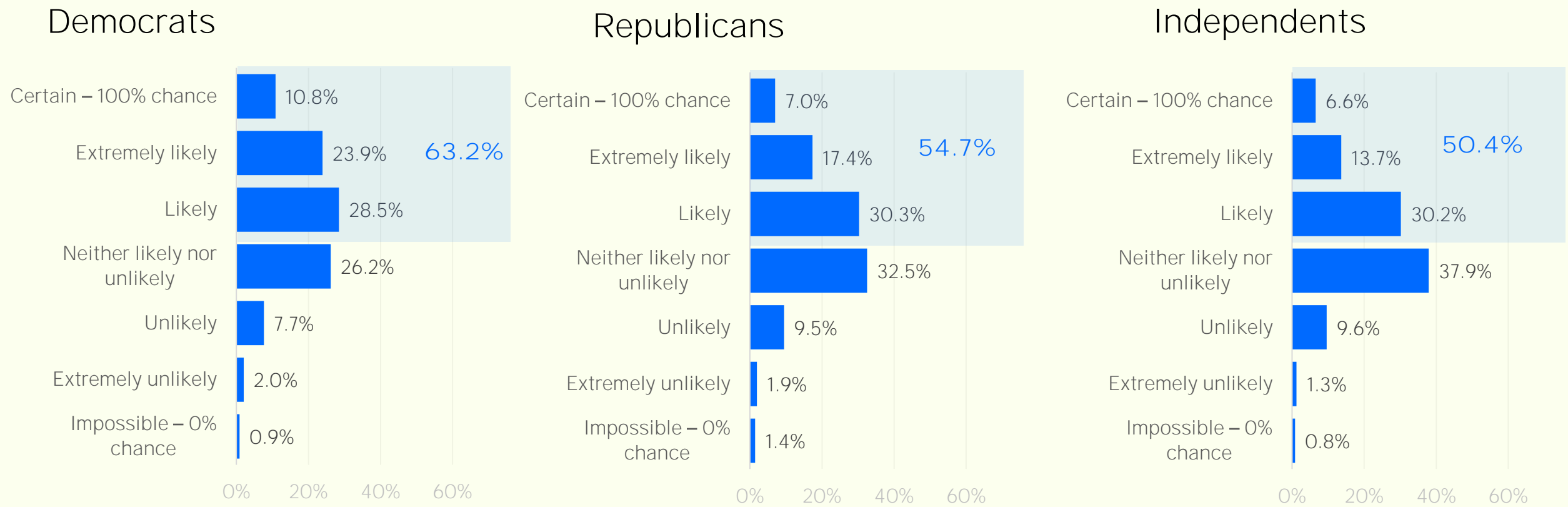
More travelers will avoid (or select) destinations based on their personal politics.

Politics will matter in destination selection.

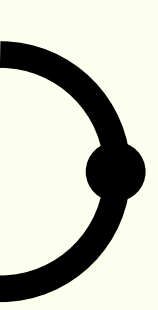
Statement:
More travelers will avoid (or select)
destinations based on their personal politics.



Democrats are most likely to see politics playing a role in destination decisions.



Statement: More travelers will avoid (or select) destinations based on their personal politics.



War and Peace

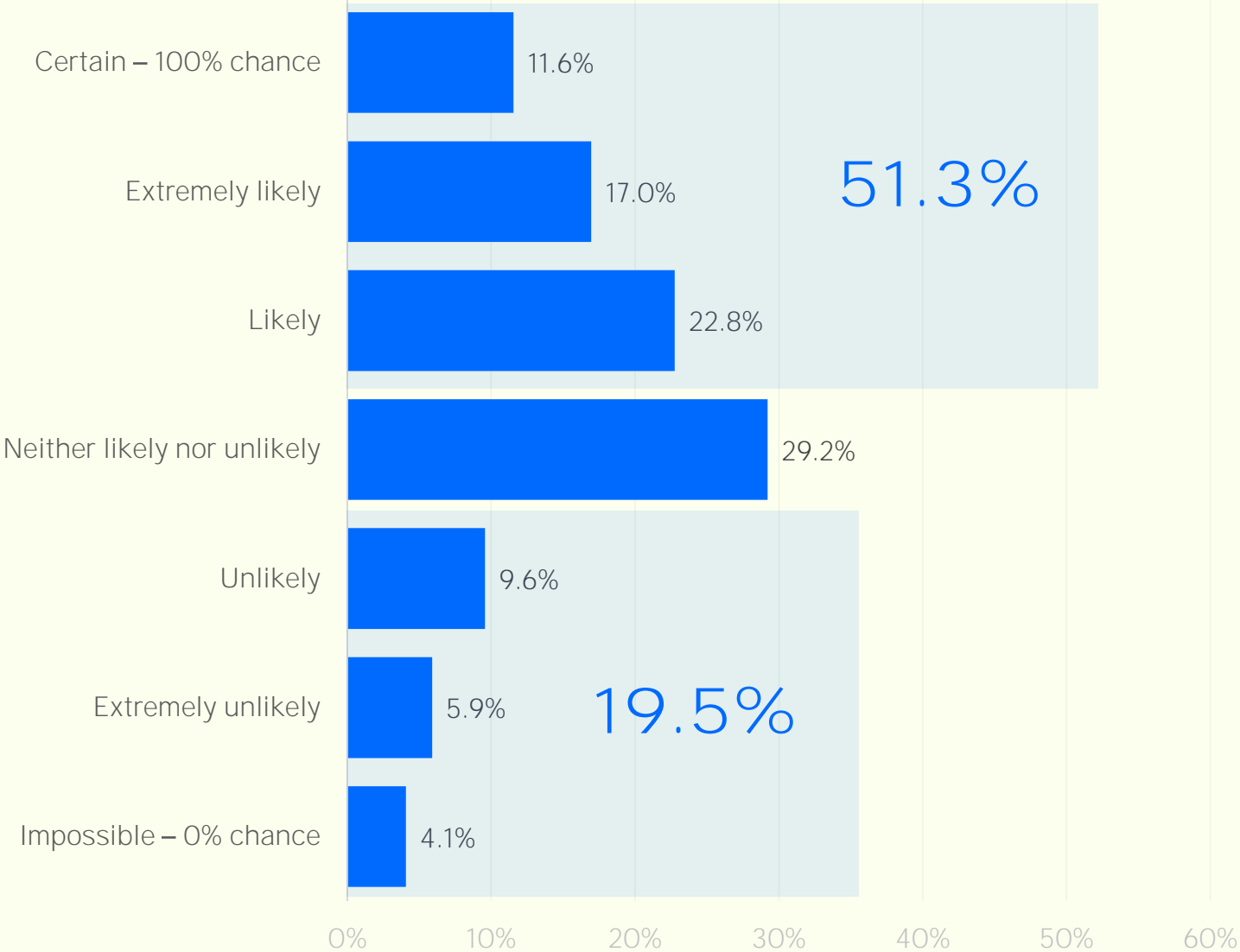
Statement:

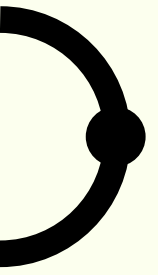
Global wars/strife will impact the destinations I visit in 2024.

Global wars/strife will also impact destination selection in 2024

Statement:

Global wars/strife will impact the destinations I visit in 2024.





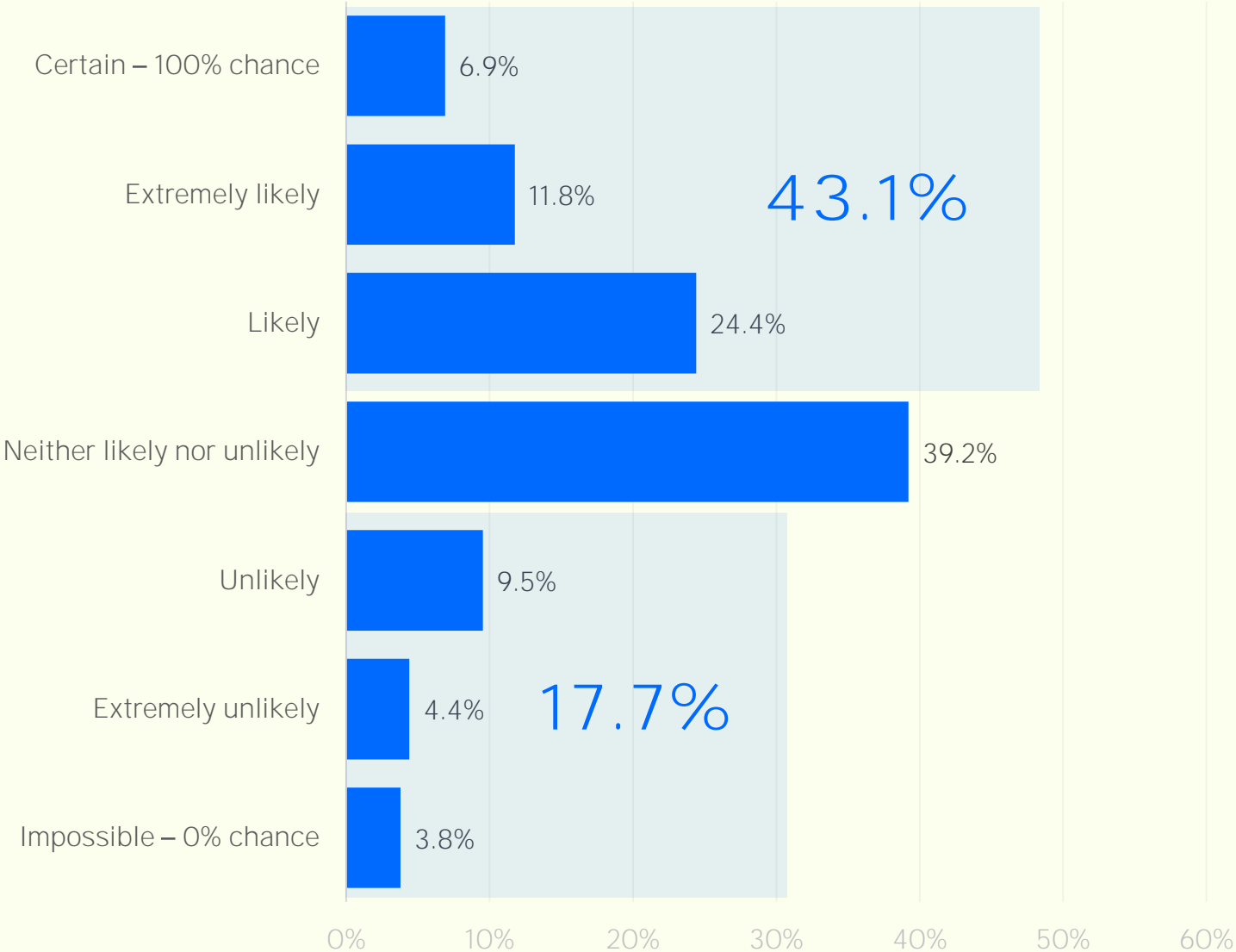
Environmental Impacts of Travel

Statement:

I'll be more proactive in reducing the impact of my travel on the environment.

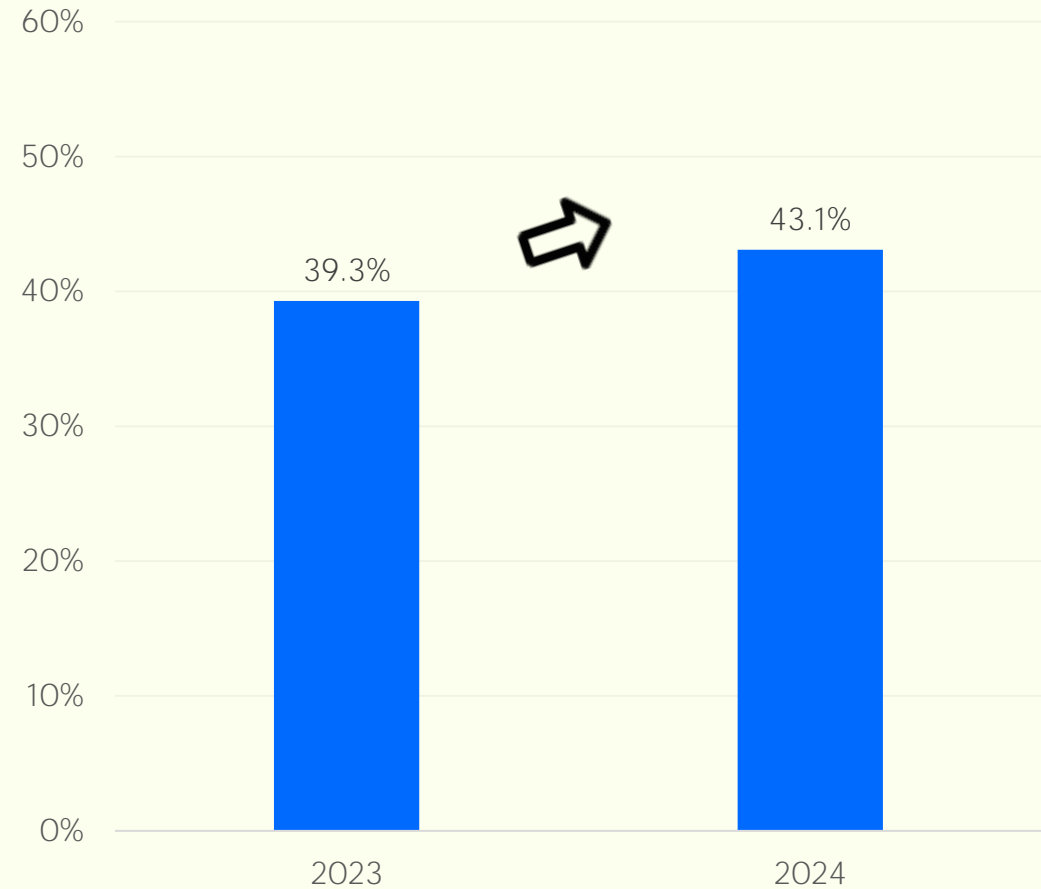
Many travelers will be mindful of the environmental impacts of travel.

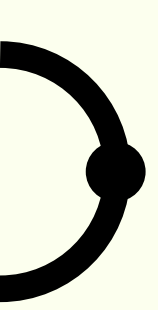
Statement:
I'll be more proactive in reducing the impact of my travel on the environment.



Statement:

I'll be more proactive
in reducing the
impact of my travel
on the environment.





Climate Change-Related Behaviors

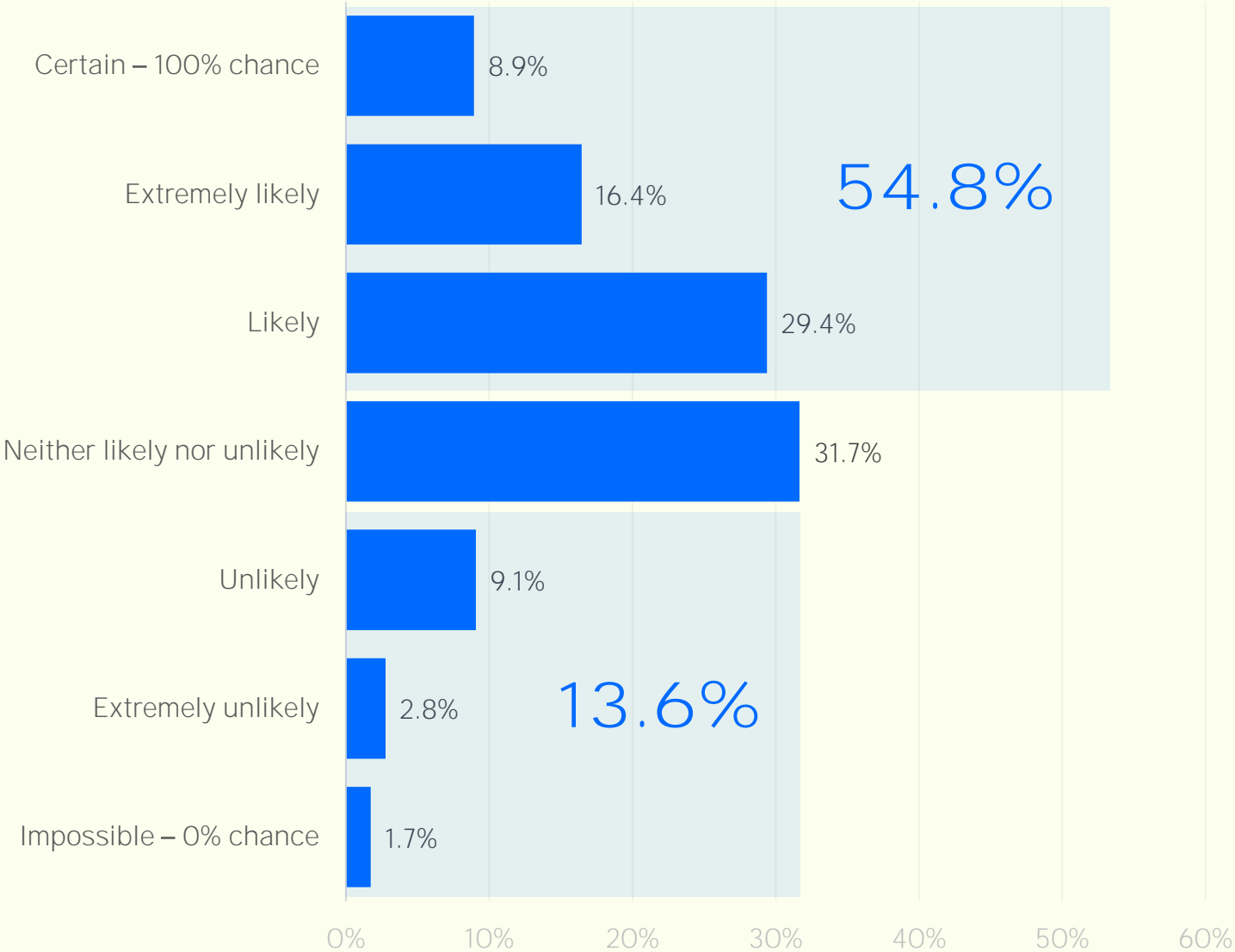
Statement:

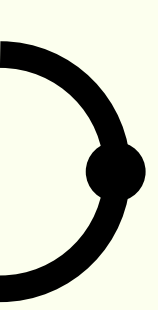
With higher temperatures each year, travelers will try to seek out cooler places.

Climate change will impact destination selection.

Statement:

With higher temperatures each year, travelers will try to seek out cooler places.





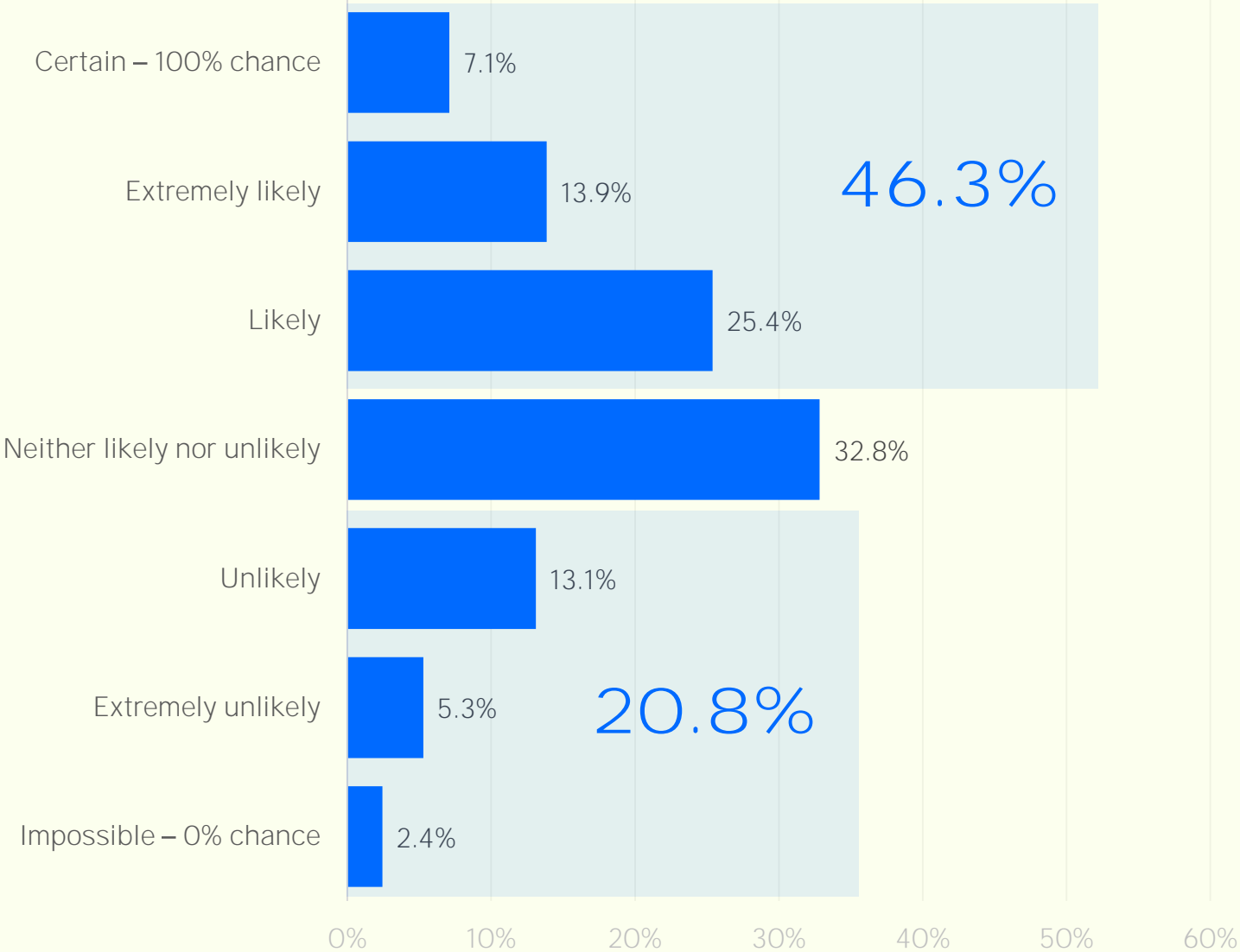
Statement:

American cities will become more dangerous and unmanageable places to visit.

Perceptions of urban travel will continue to face challenges.

Statement:

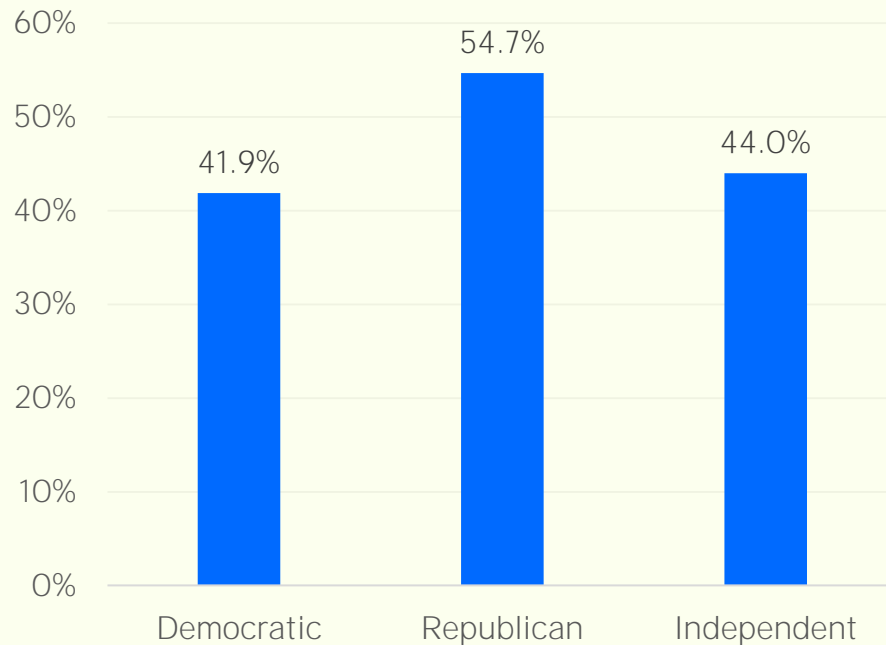
American cities will become more dangerous and unmanageable places to visit.



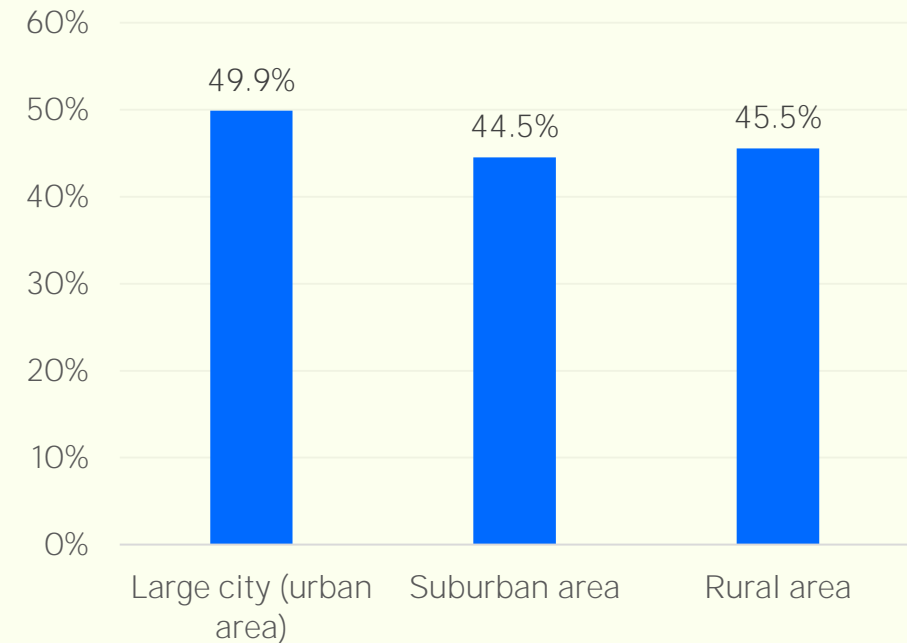
There are notable differences among demographics in perceptions of American cities.

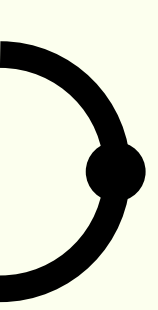
Statement: American cities will become more dangerous and unmanageable places to visit.

By Political Affiliation, (Top 3-Box Score)



By Place of Residence, (Top 3-Box Score)





Sober Travel

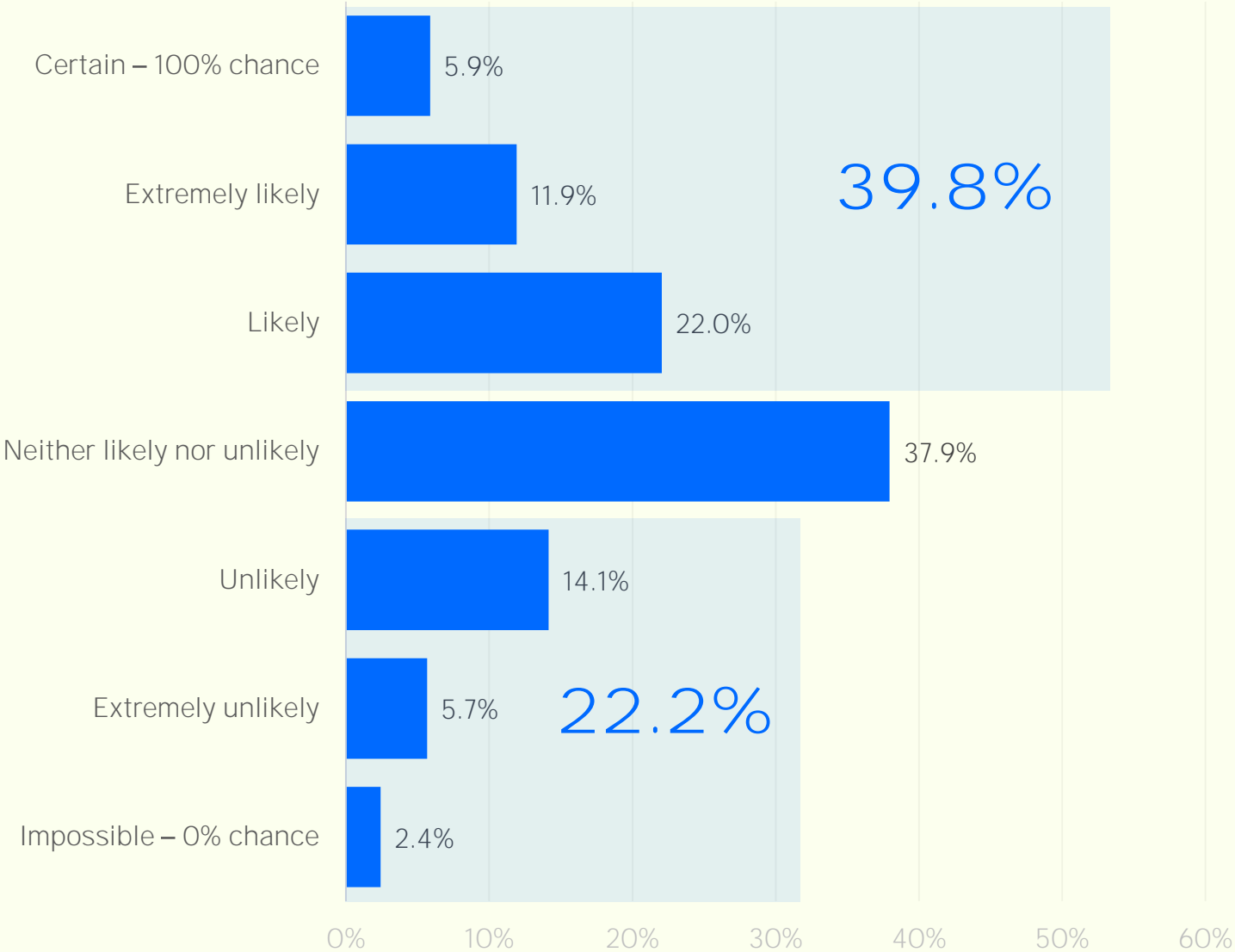
Statement:

Dry-tripping (i.e., no-alcohol
getaways) will become more popular.

Sober travel gains popularity?

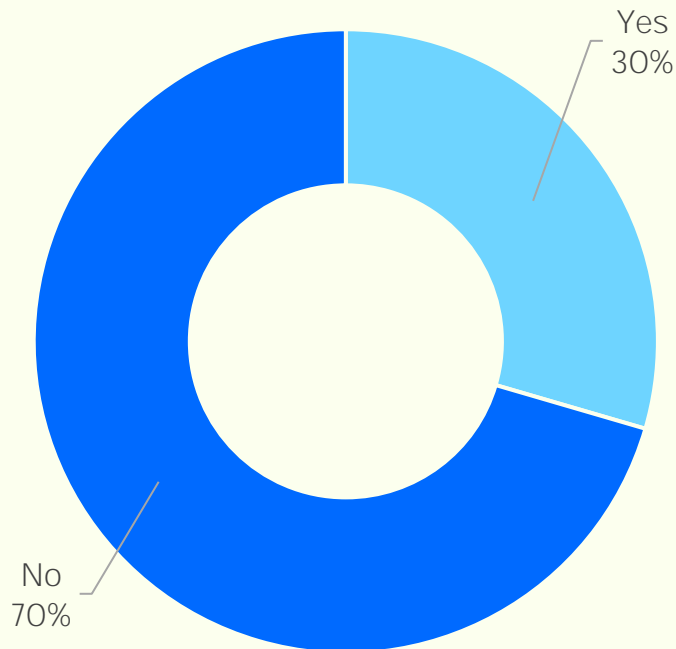
Statement:

Dry-tripping (i.e., no-alcohol getaways) will become more popular.

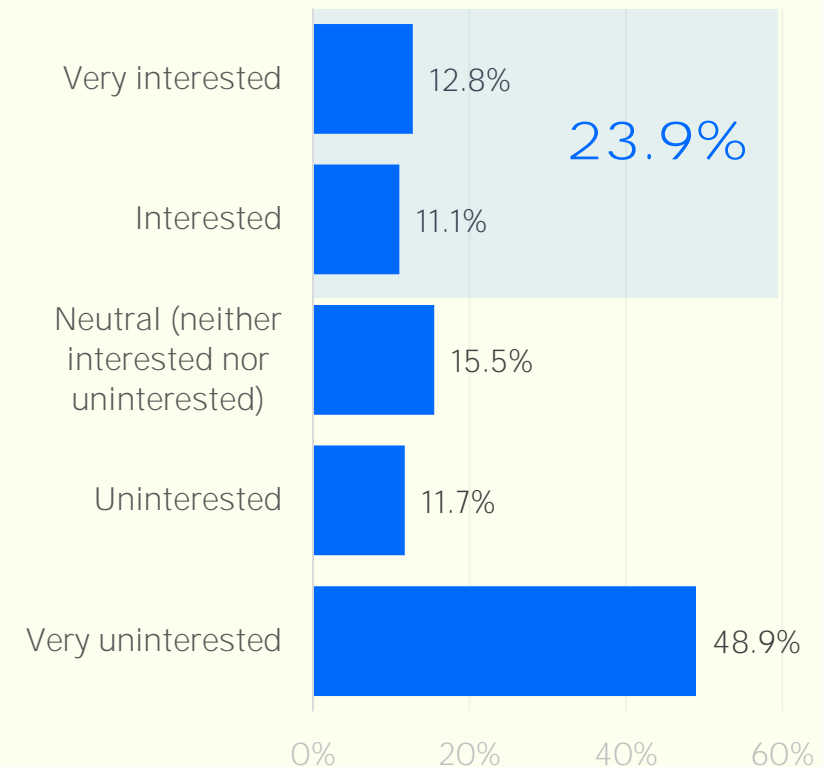


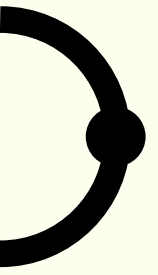
American travelers remain nevertheless interested in intoxication

Question: Do you consume cannabis or cannabis-derived products?



Question: [Psychedelic tourism](#) is traveling to explore the use of drugs such as ayahuasca, psilocybin (magic mushrooms), etc. How interested would you be in this type of travel?





Crowding & the High Cost of Travel

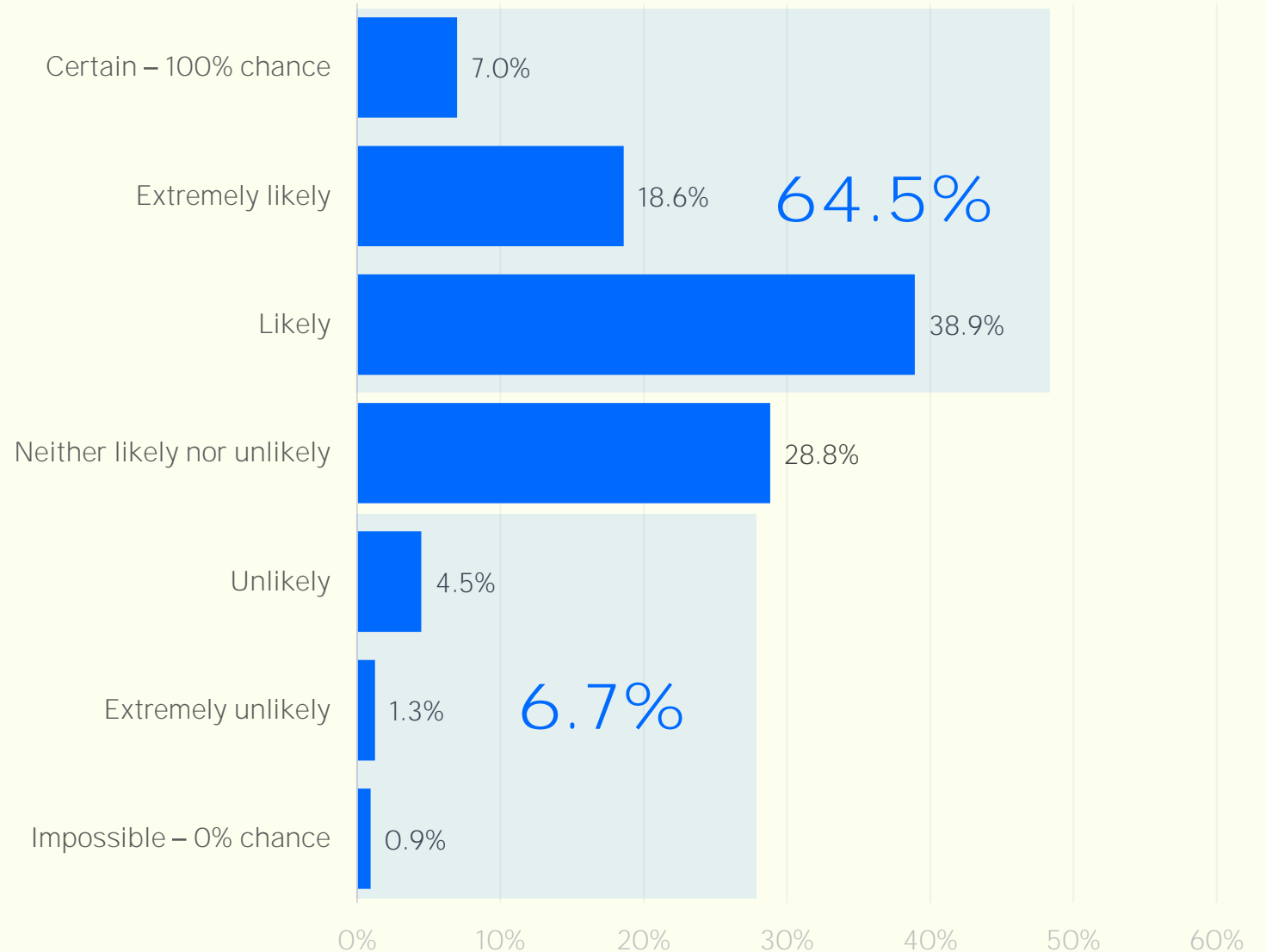
Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.

The cost and crowding of high-popularity destinations will inspire tourism to the “undiscovered”

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.





Avoiding Over-Priced Destinations—
Substituting

Statement:

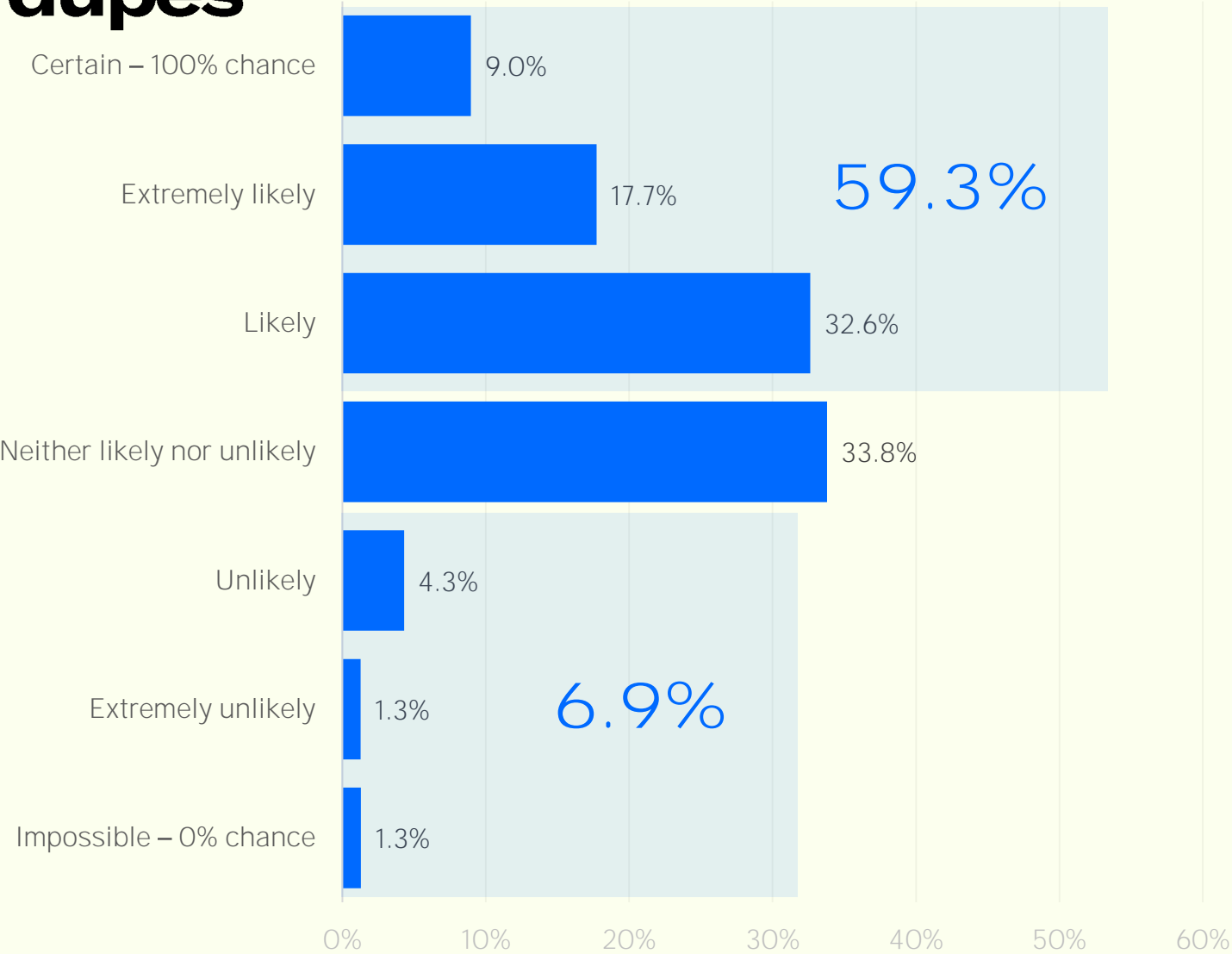
“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

In 2024, visiting dupes will grow in popularity.

High travel prices will impact destination selection, with a shift towards “dupes”

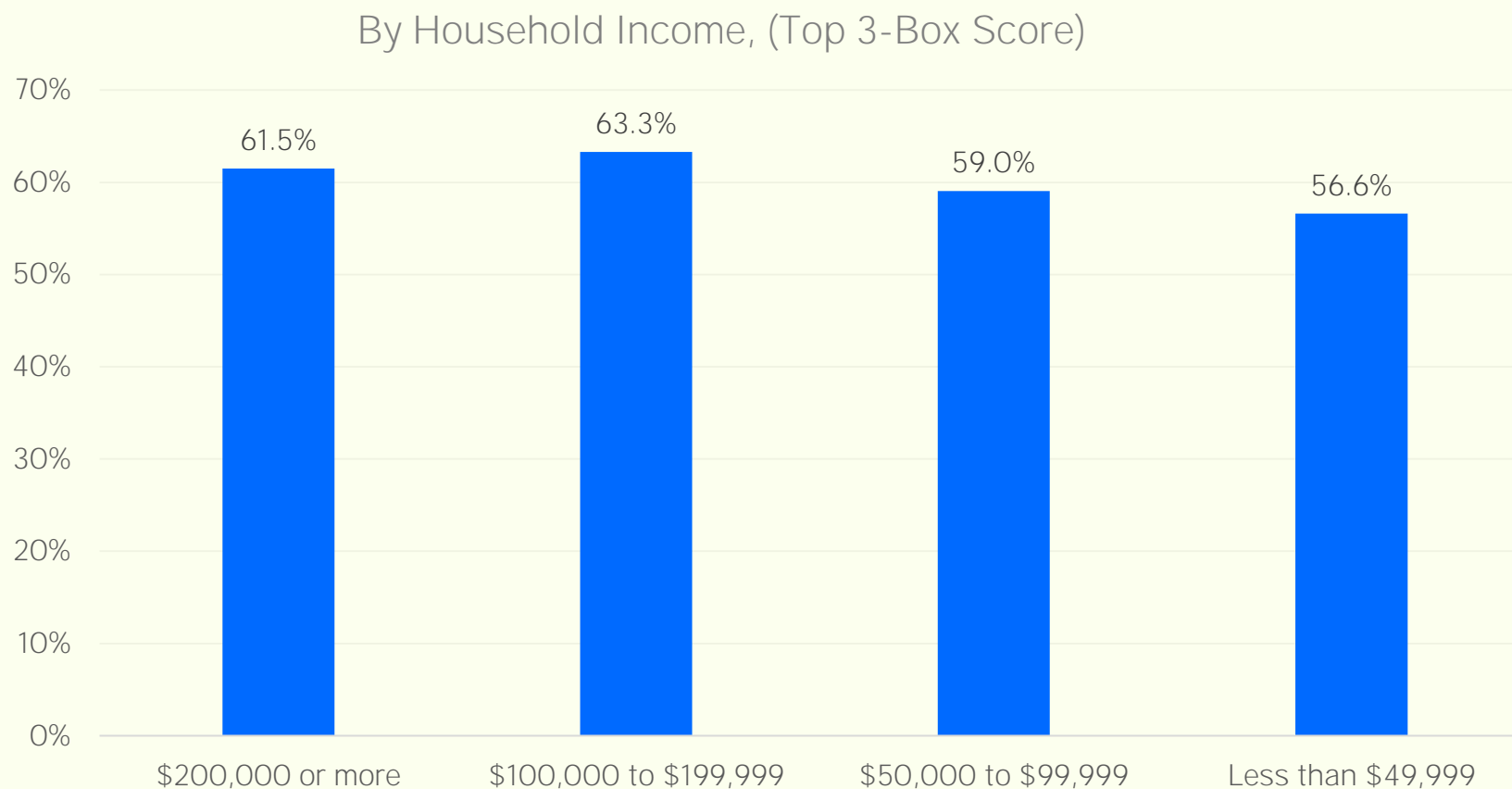
Statement:


“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2024, visiting dupes will grow in popularity.



The desire for value transcends income strata.

Statement: “Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2024, visiting dupes will grow in popularity.





Europe continues to be the “It Destination.”

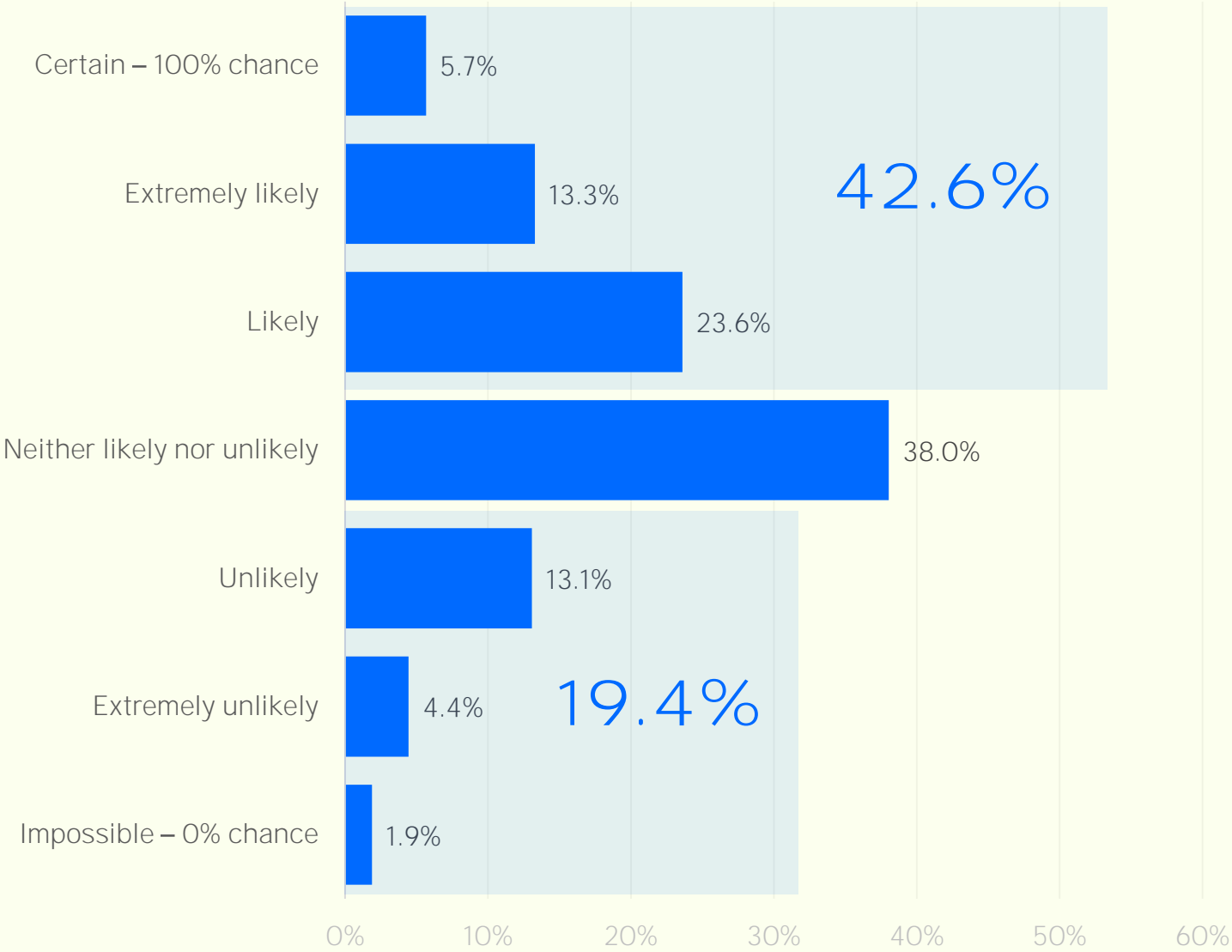
Statement:

Europe will be the most popular international travel destination for Americans.

Europe continues to be **Americans' most favored** overseas destination.

Statement:

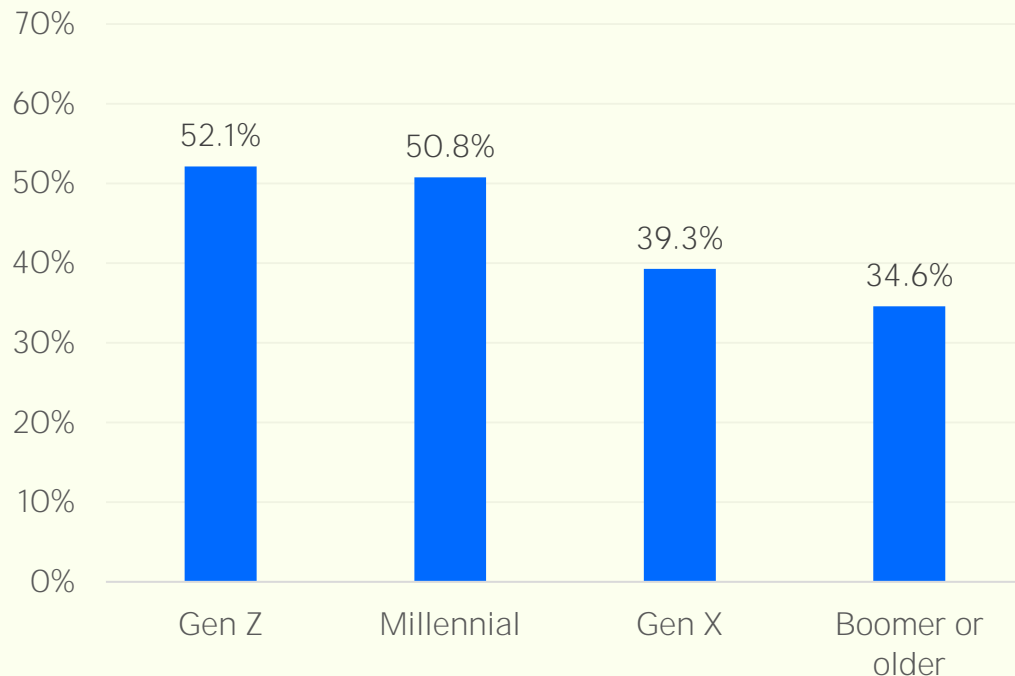
Europe will be the most popular international travel destination for Americans.



This perception is led by younger travelers who are passionate about international travel.

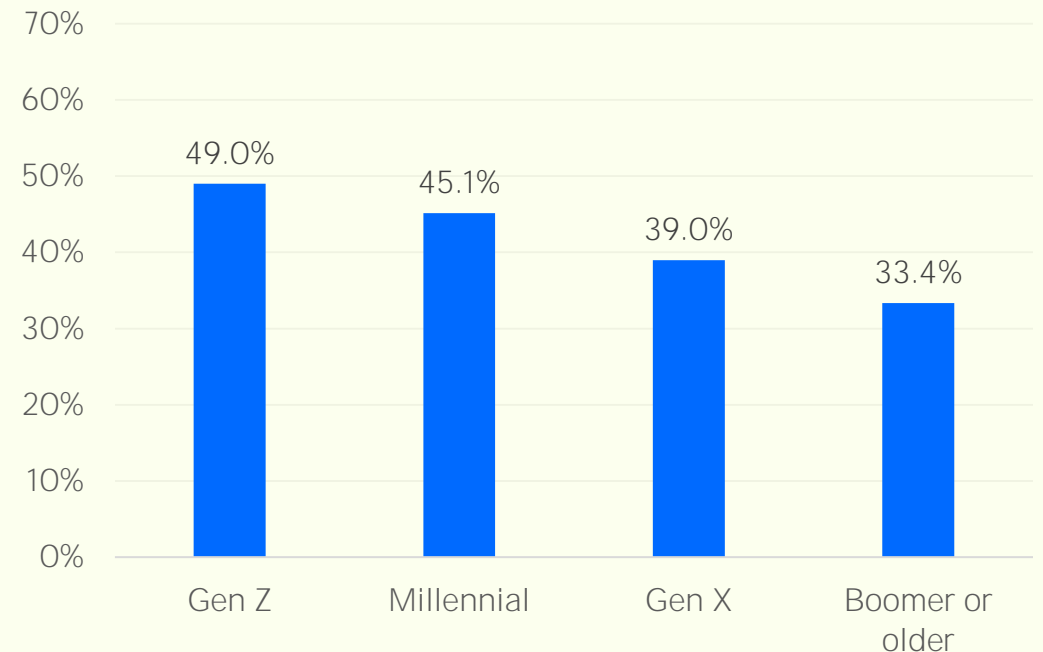
Question: Europe will be the most popular international travel destination for Americans.

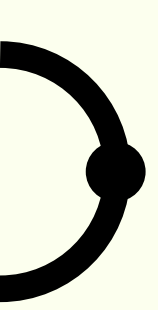
By Generation, (Top 3-Box Score)



Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

% Passionate about or Highly-interested in International Travel





Vanity & Travel

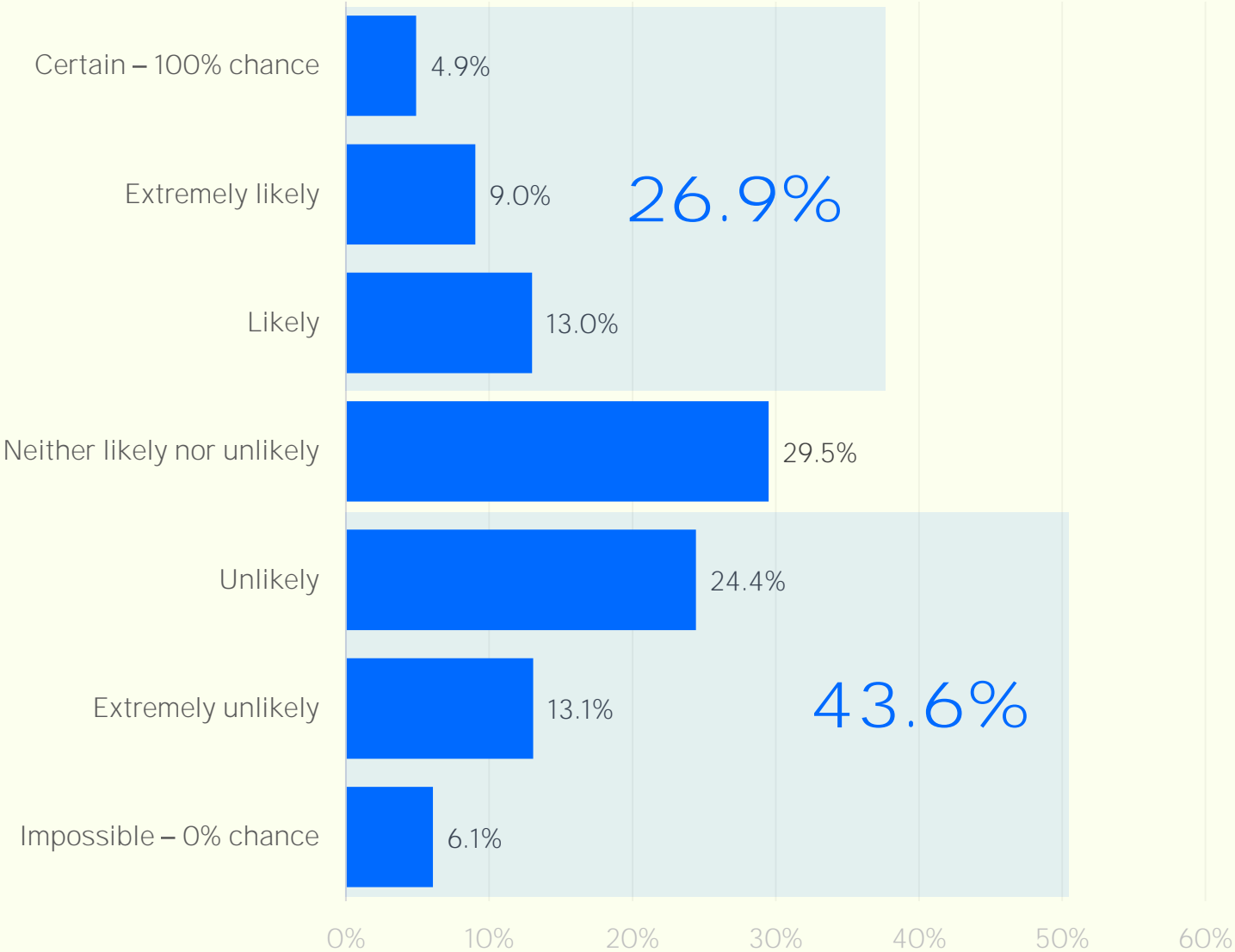
Statement:

The "selfie" photograph will become a relic of the past.

Vanity still has an established role in travel

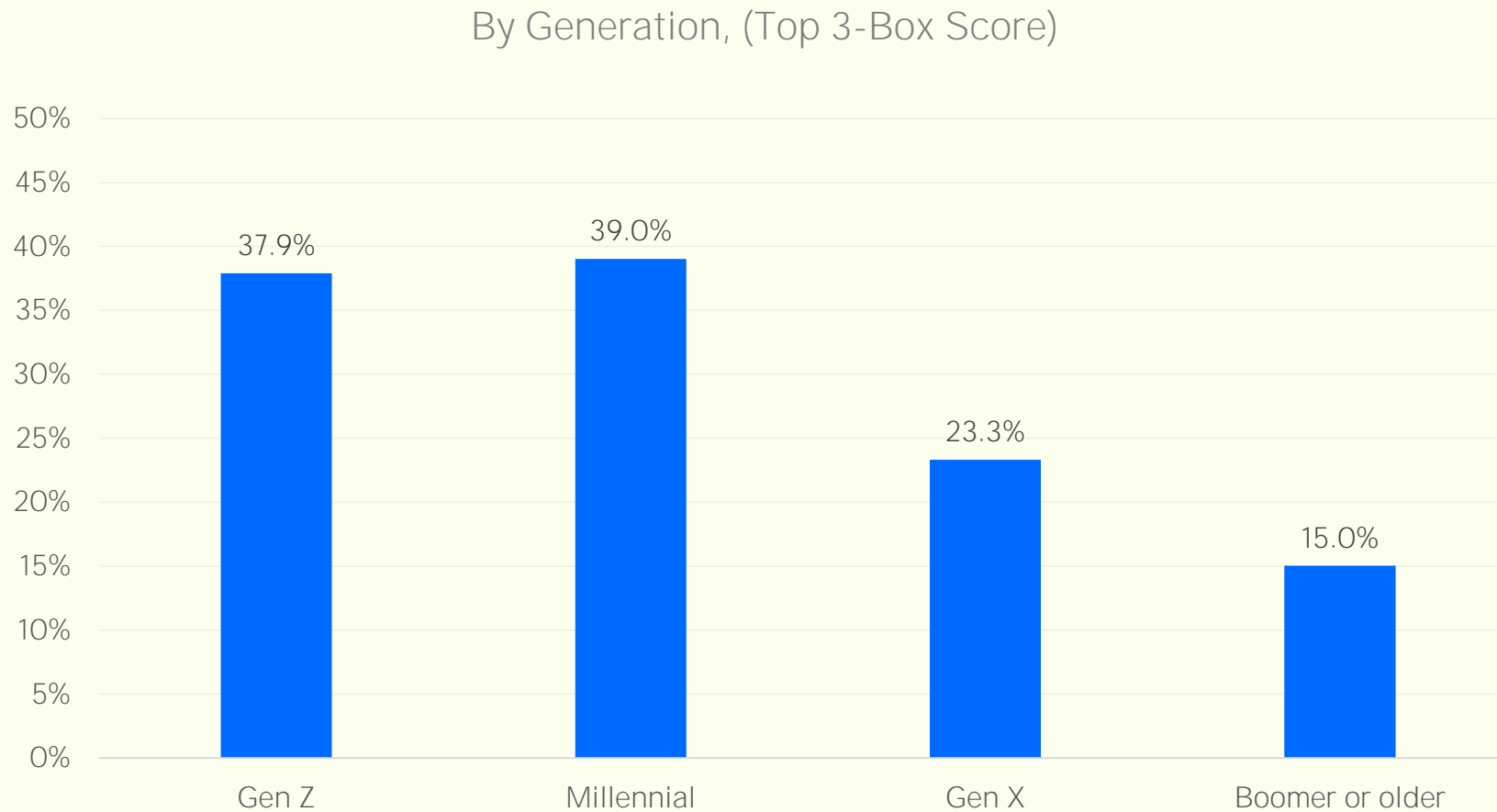
Statement:

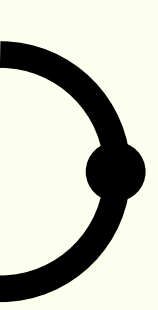
The "selfie" photograph will become a relic of the past.



Are younger travelers changing the rules on bragging rights?

Statement: The "selfie" photograph will become a relic of the past.





Appeal of Travel Influencers

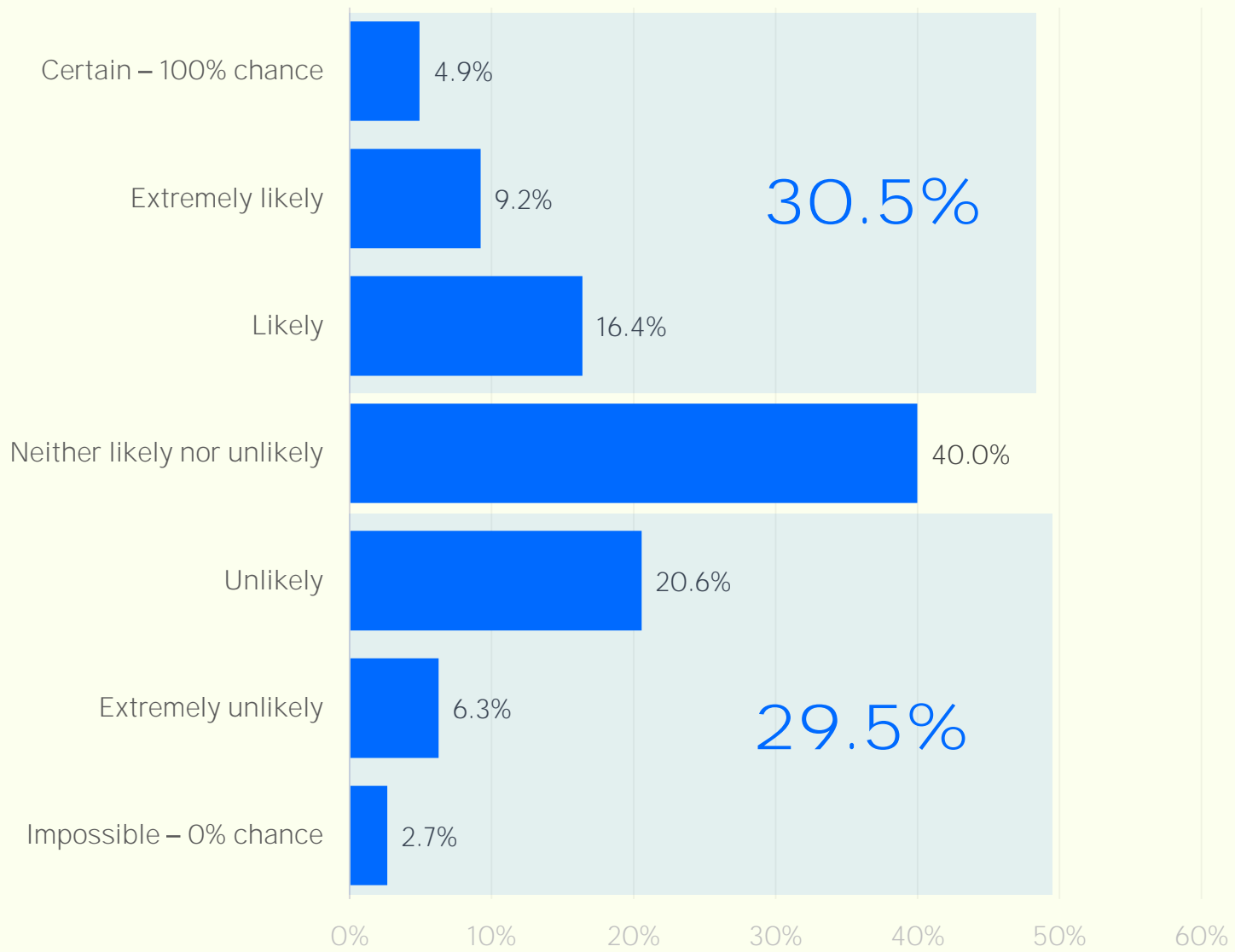
Statement:

The appeal and use of social media "travel influencers" will decline.

Three in ten anticipate a decline in the appeal of social media influencers.

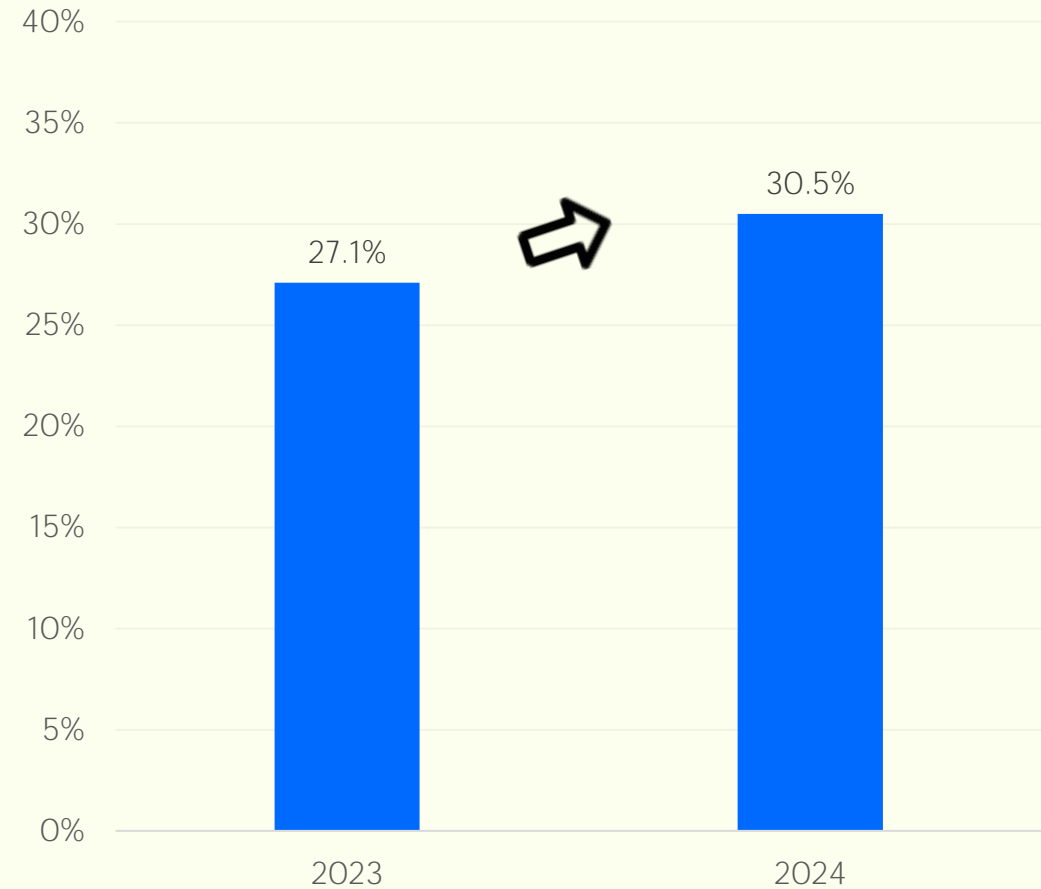
Statement:

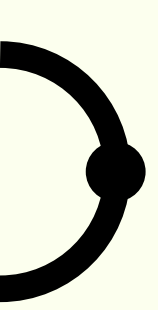
The appeal and use of social media "travel influencers" will decline.



Statement:

The appeal and use of social media "travel influencers" will decline.





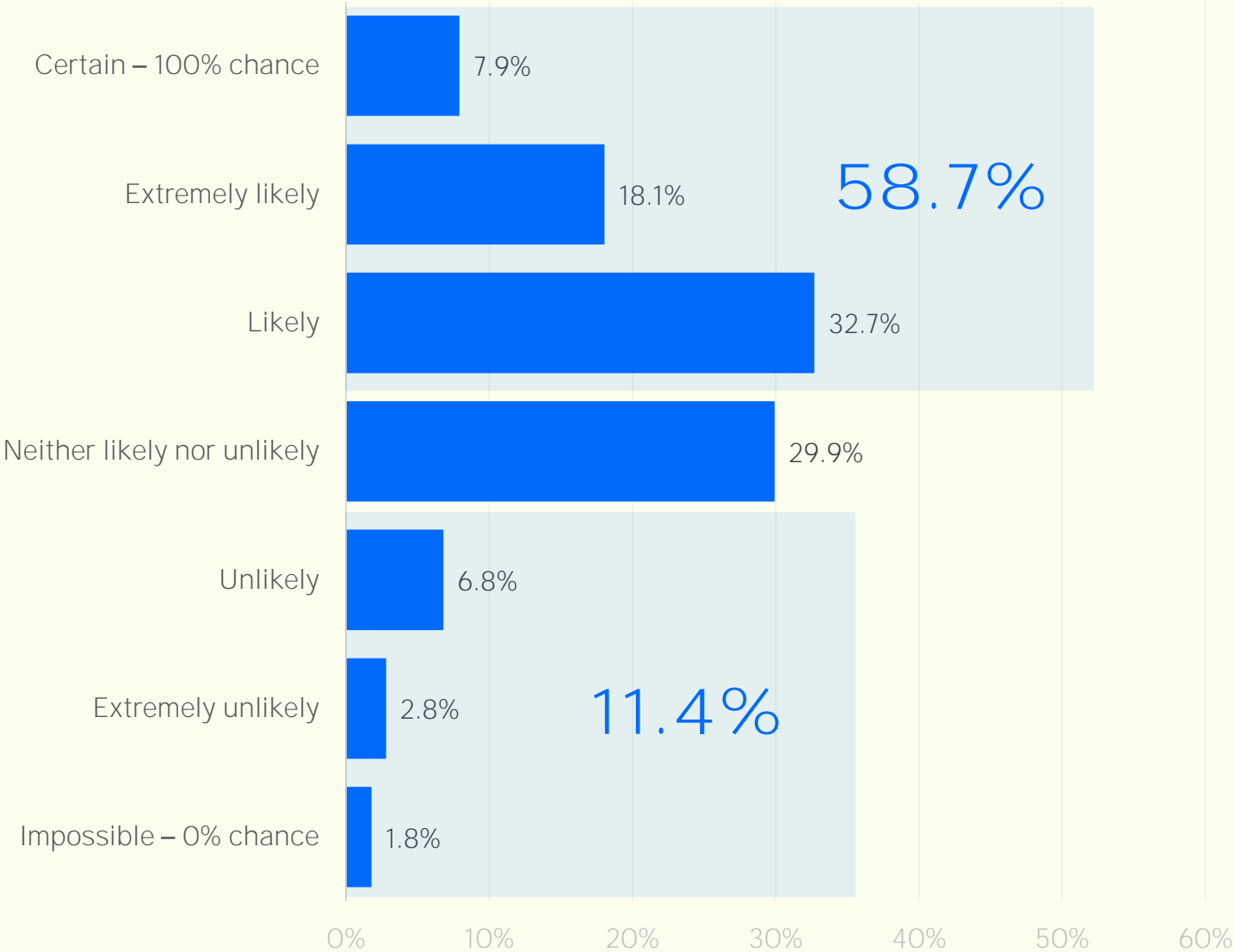
Statement:

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips.

A majority of travelers anticipate AI for trip planning will be commonplace soon

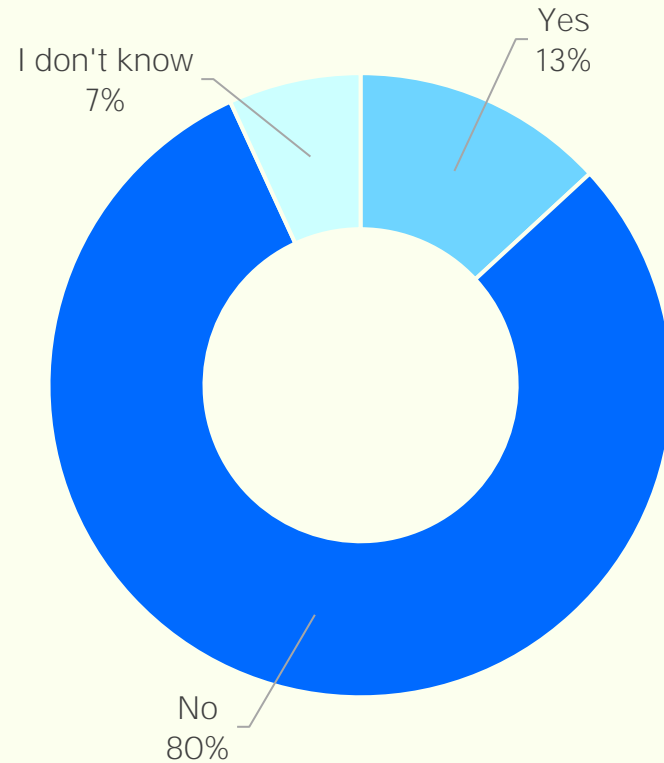
Statement:

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips.



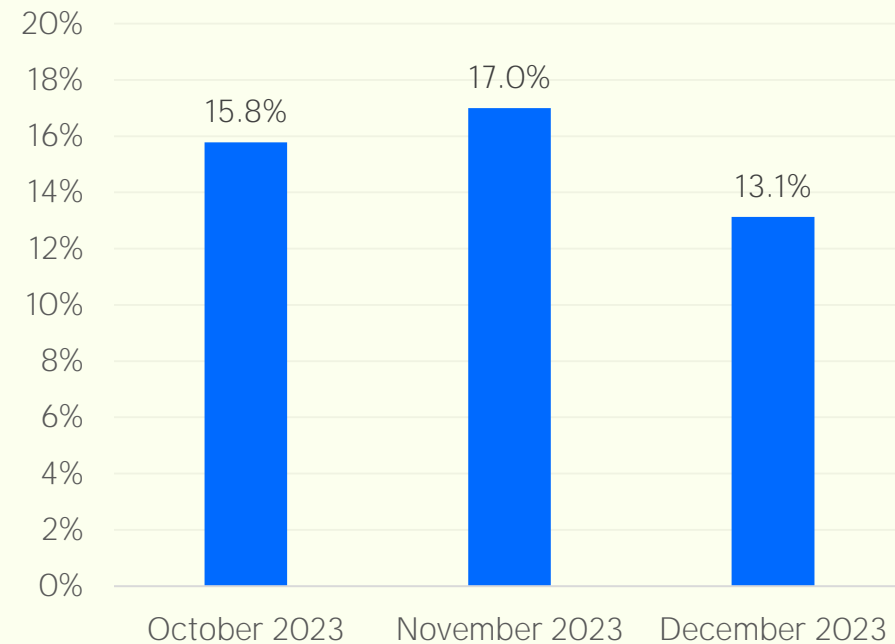
However, adoption of AI tools for travel planning has not yet gained significant ground.

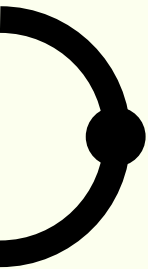
Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Use of AI tools has been unchanged this fall

Historical data





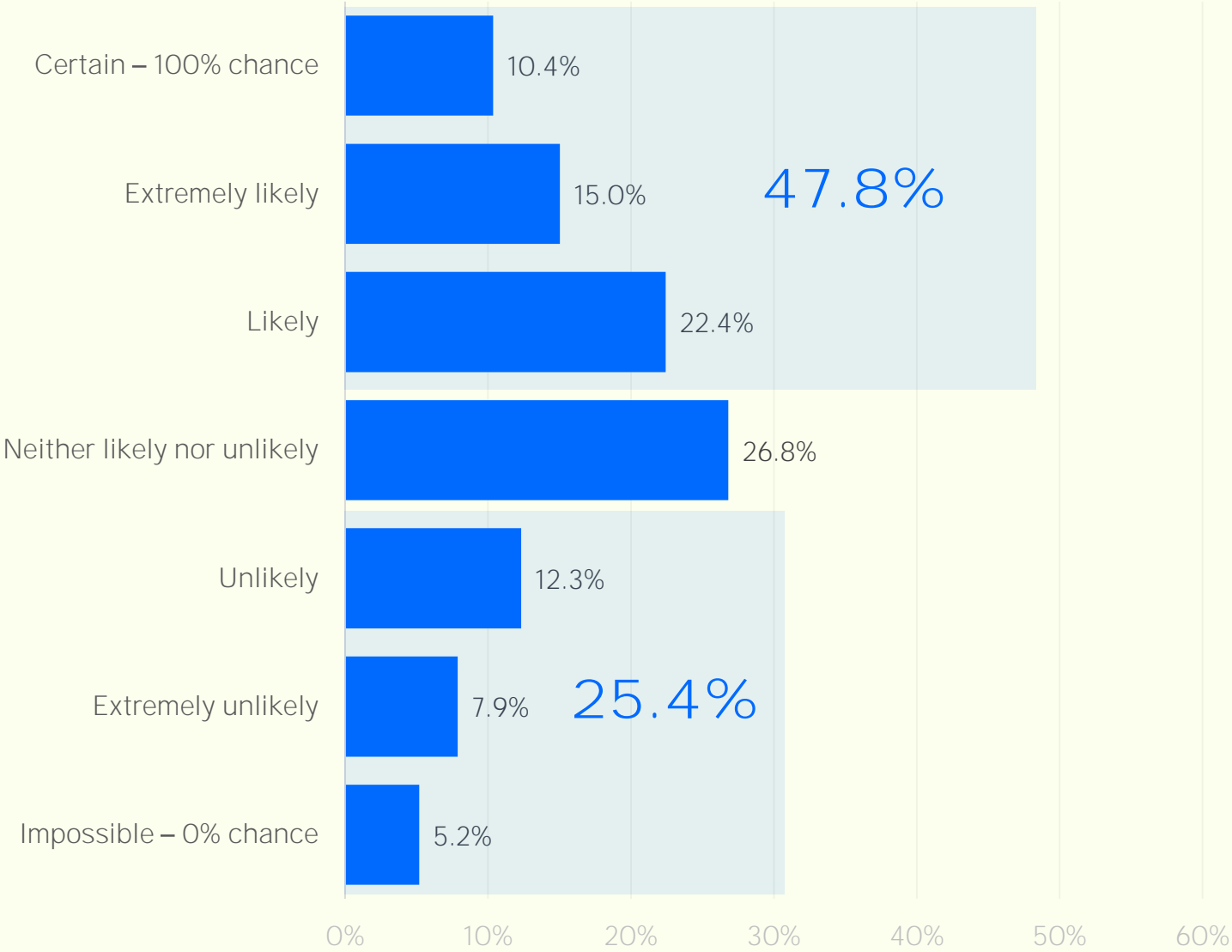
Dream Trips

Statement:

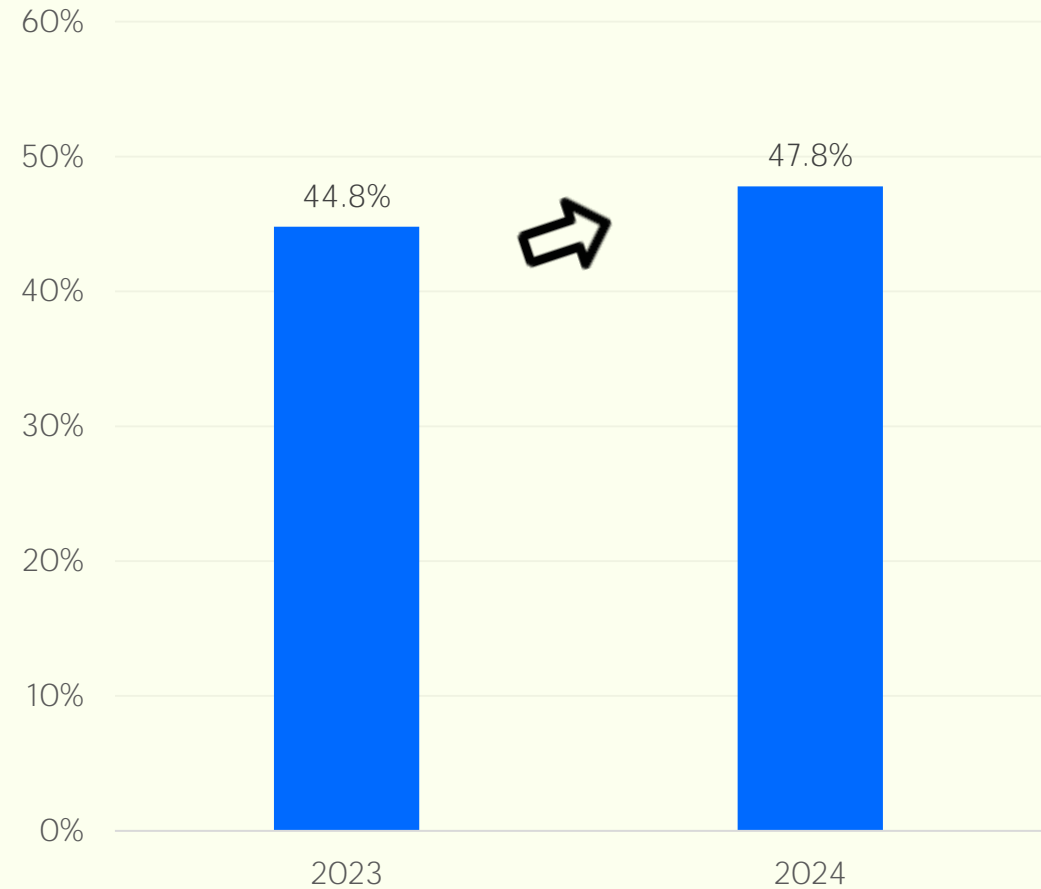
I'll take a dream trip to somewhere
exciting in 2024

Nearly half of travelers expect to take a dream trip this year.

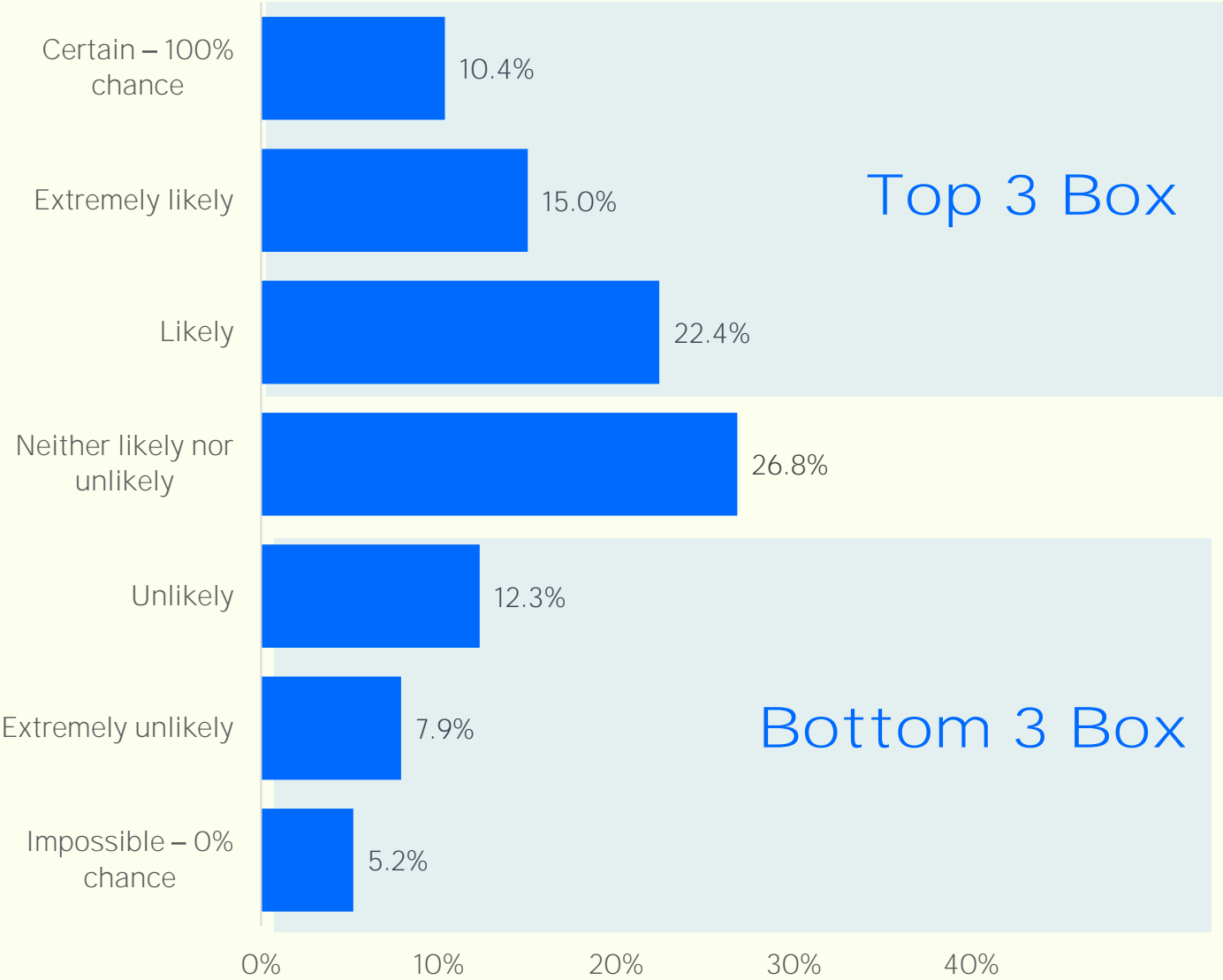
Statement:
I'll take a dream trip to somewhere exciting in 2024.



Statement:
I'll take a dream
trip to somewhere
exciting (this year).



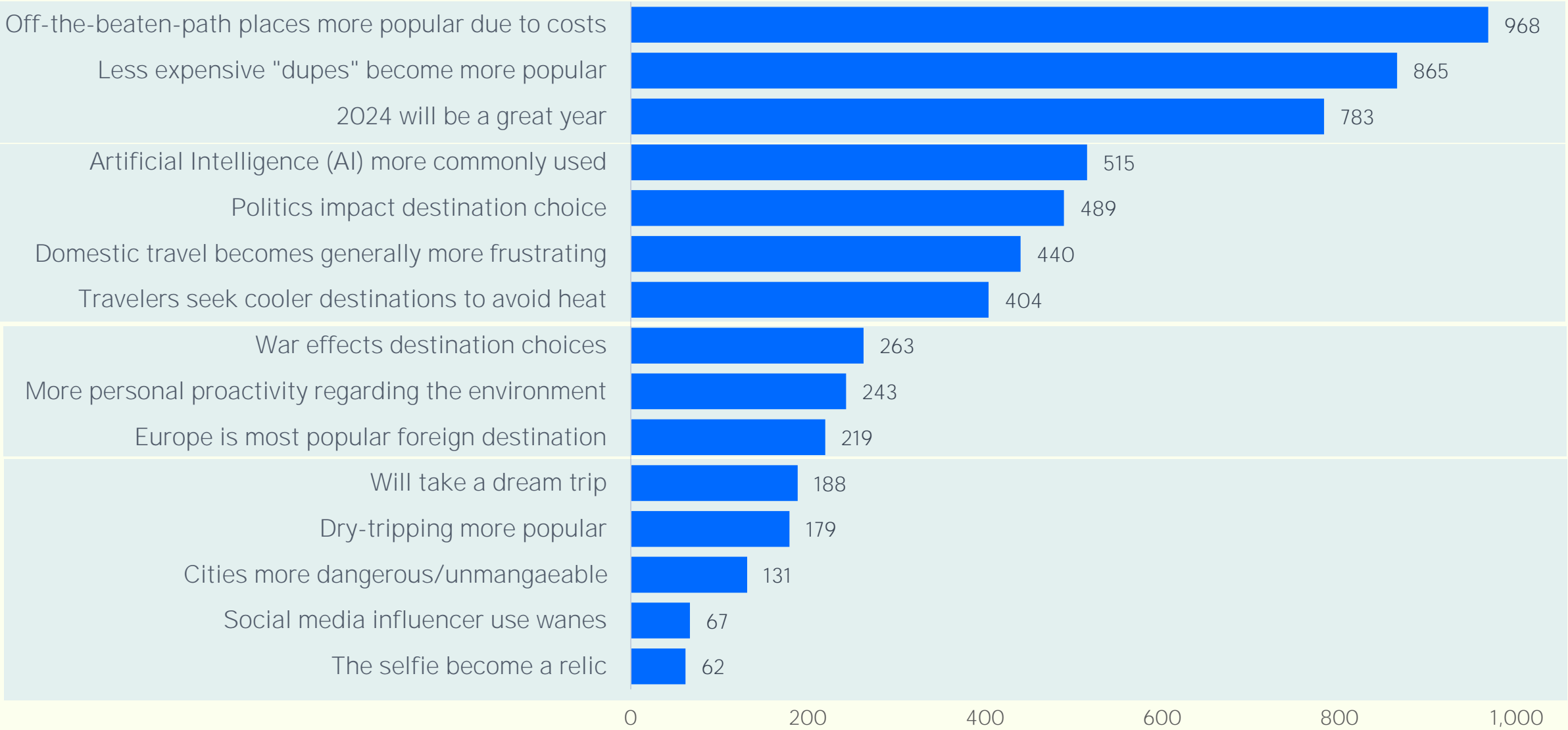
Putting it all in perspective: An Index



Crowdsourcing Index:

$$\frac{\text{Top 3 Box}}{\text{Bottom 3 Box}} * 100$$

Putting it in perspective: Most common predictions



A healthy outlook for both domestic and international travel persists among the continued heavy weight of high costs, as well as external factors like politics, war and climate change. American travelers are feeling good heading into 2024!

Our Research Services

Visitor & Target Audience Profiles

Audience Persona Identification

Visitor Activity Analysis & Segmentation

Brand Performance

Resident + Stakeholder Research

Advertising Testing & ROI

Hotel & Attractions Research



Research to Drive Your Strategy

Available Reports

- The State of the American Traveler
- The State of the International Traveler
- The CVB & the Future of the Meetings Industry
- The Traveling Consumer Decision-Making Journey: Hotels & Attractions
- The State of the American College Student
- Plus over 20 Passion Profiles, from Foodies to Gamers

Scan Here to Review and Purchase



Future Partners



Passion Profiles

Passion Profiles

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

Passion Profiles



Scan to learn more

The State of the International Traveler Study

Available
March 2024



Thank You!

February Livestream
Registration

