

THE STATE OF THE AMERICAN TRAVELER

Presentation of Findings
February 2023

Destination  Analysts



The background is a high-angle, night-time photograph of a city skyline, likely Singapore, with numerous skyscrapers and city lights. Overlaid on this image is a complex network of glowing digital lines in various colors (blue, purple, pink, red) that connect different points across the frame, creating a sense of data flow and connectivity. The lines are most prominent in the foreground and middle ground, with some extending towards the horizon.

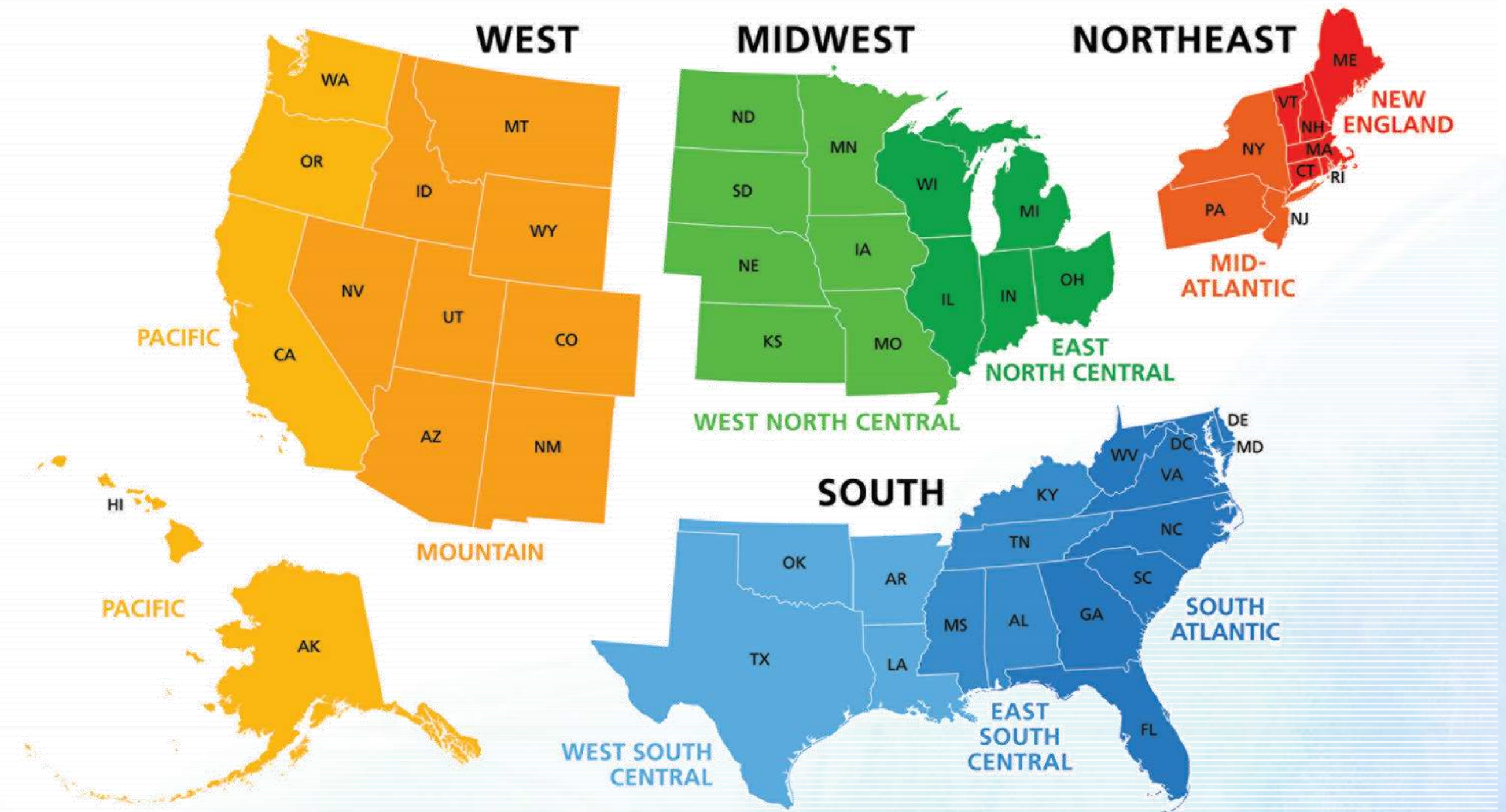
Destination Analysts

Independent, Unbiased Research

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: **January 15-25**
- 4,000+ fully completed surveys collected each wave
- Confidence interval of $\pm 1.55\%$
- Data is weighted to reflect the actual population of each region

UNITED STATES CENSUS REGIONS AND DIVISIONS

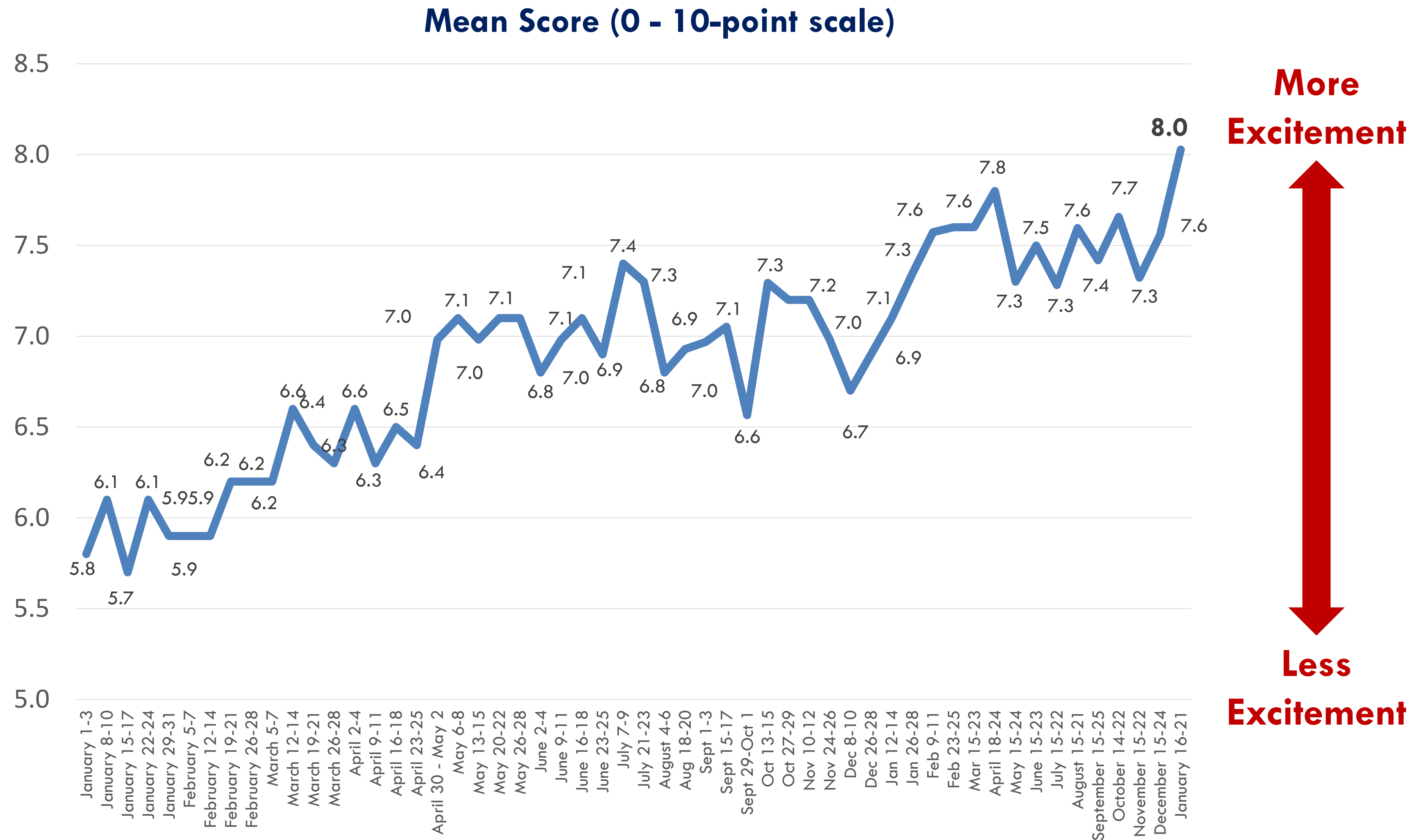


I ♥
STARBUCKS

EXCITEMENT FOR LEISURE TRAVEL (NEXT 12 MONTHS)

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)

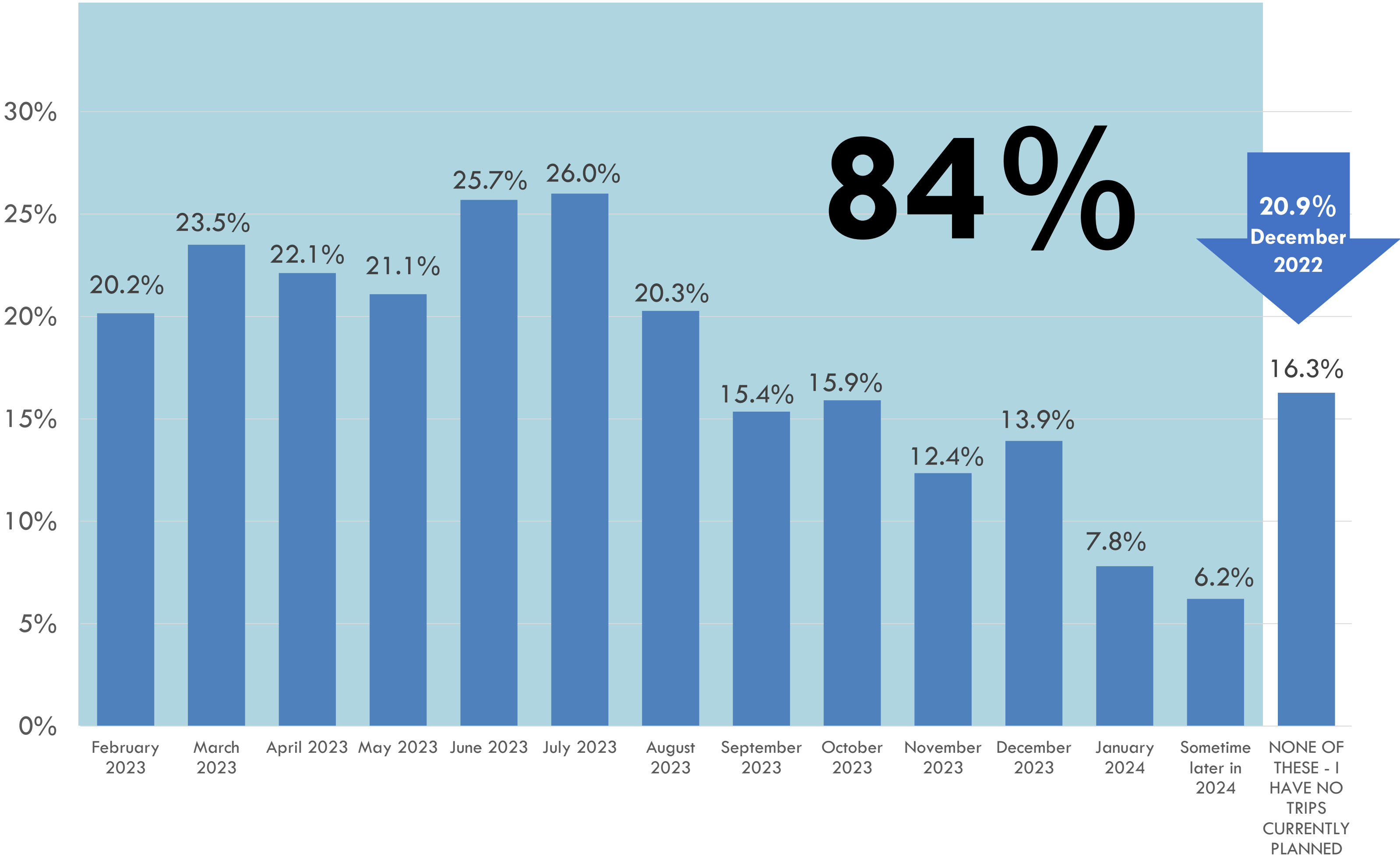
(Base: All respondents, 1,200+ completed surveys each wave in 2020-2021. 4,000+ completed surveys each wave in 2022 and 2023)



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)

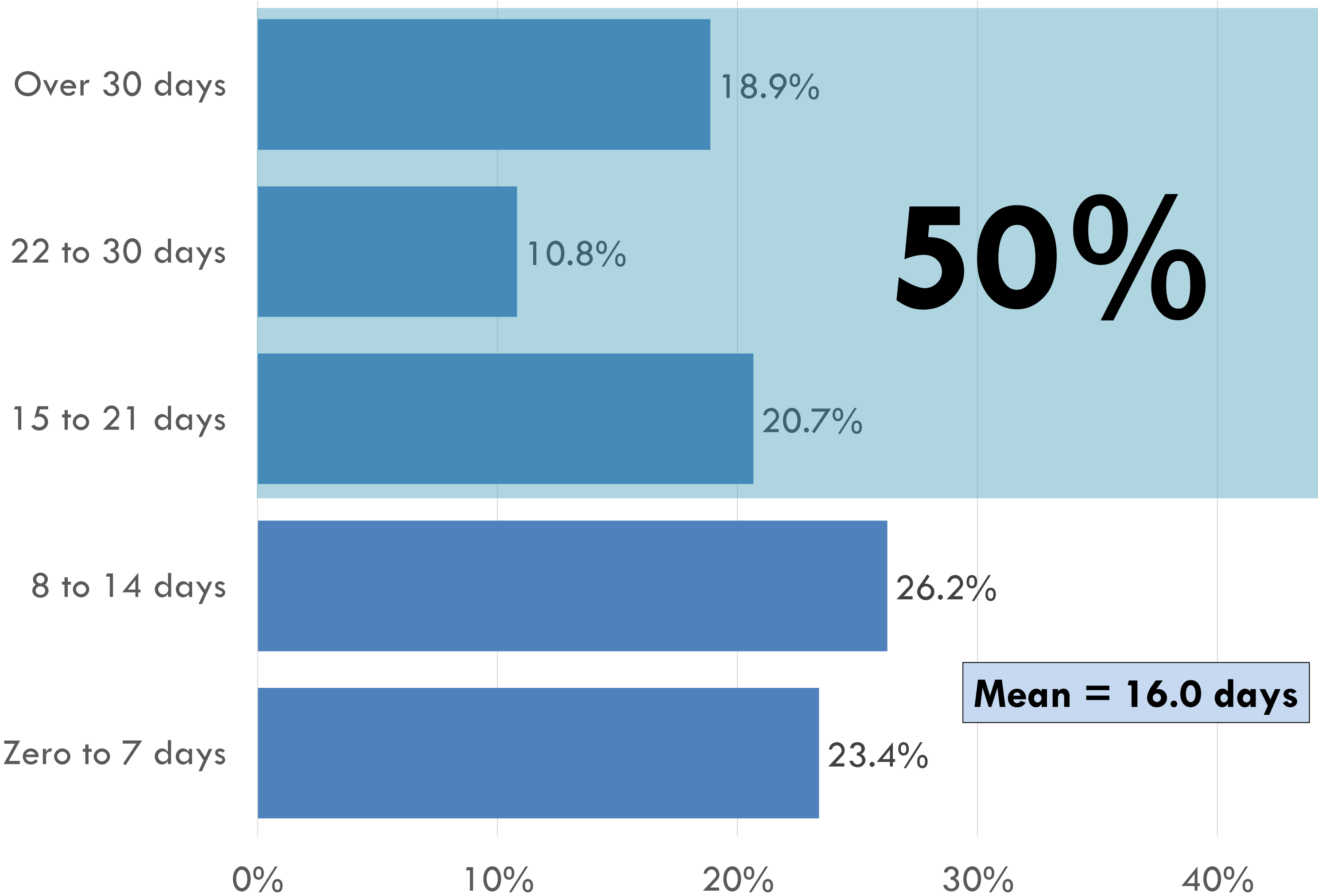
(Base: All respondents, 4,025 completed surveys.
Data collected January 16-21, 2023.)



DAYS AVAILABLE FOR LEISURE TRAVEL (NEXT 12 MONTHS)

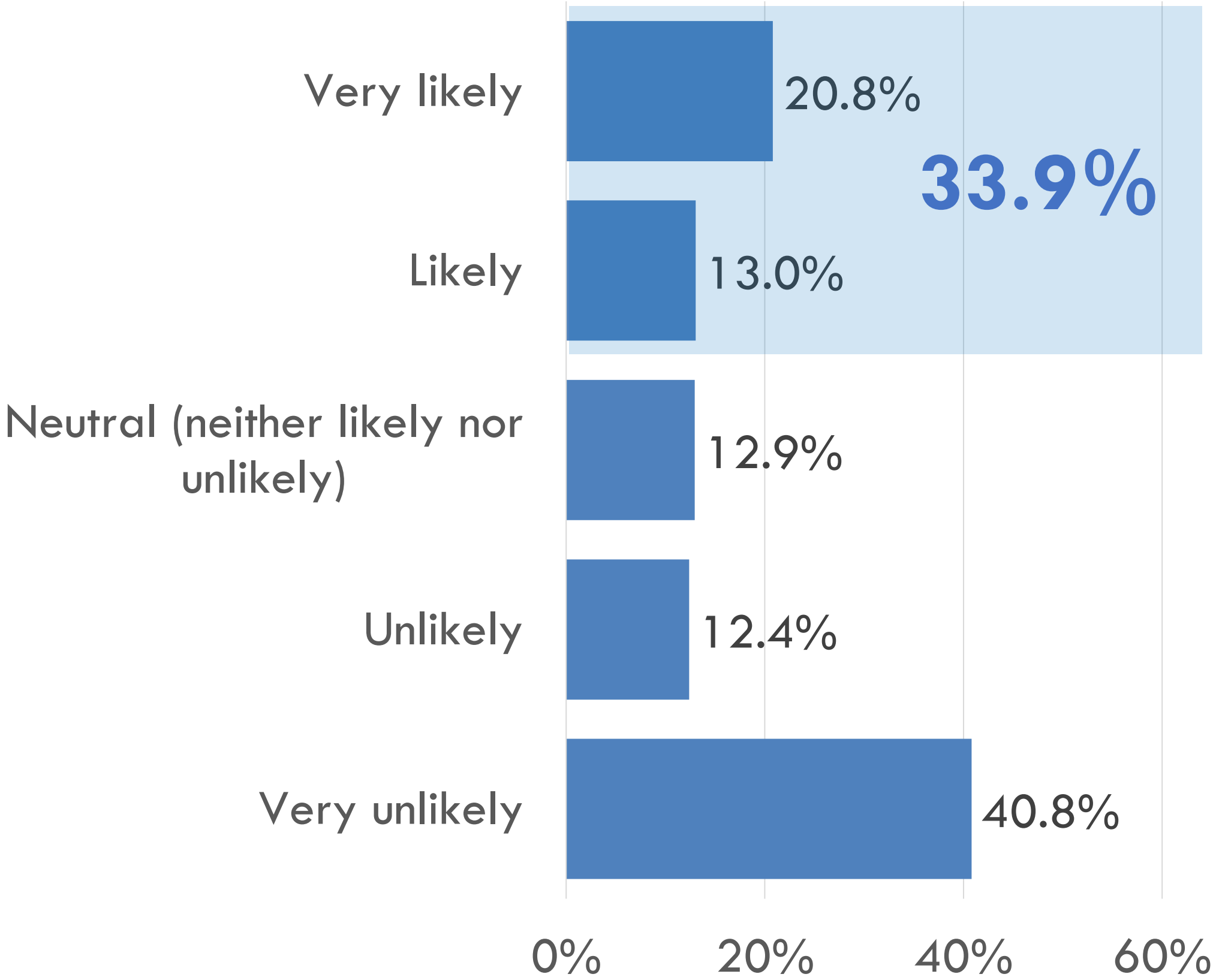
Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

(Base: All respondents, 4,025 completed surveys. Data collected January 16-21, 2023.)

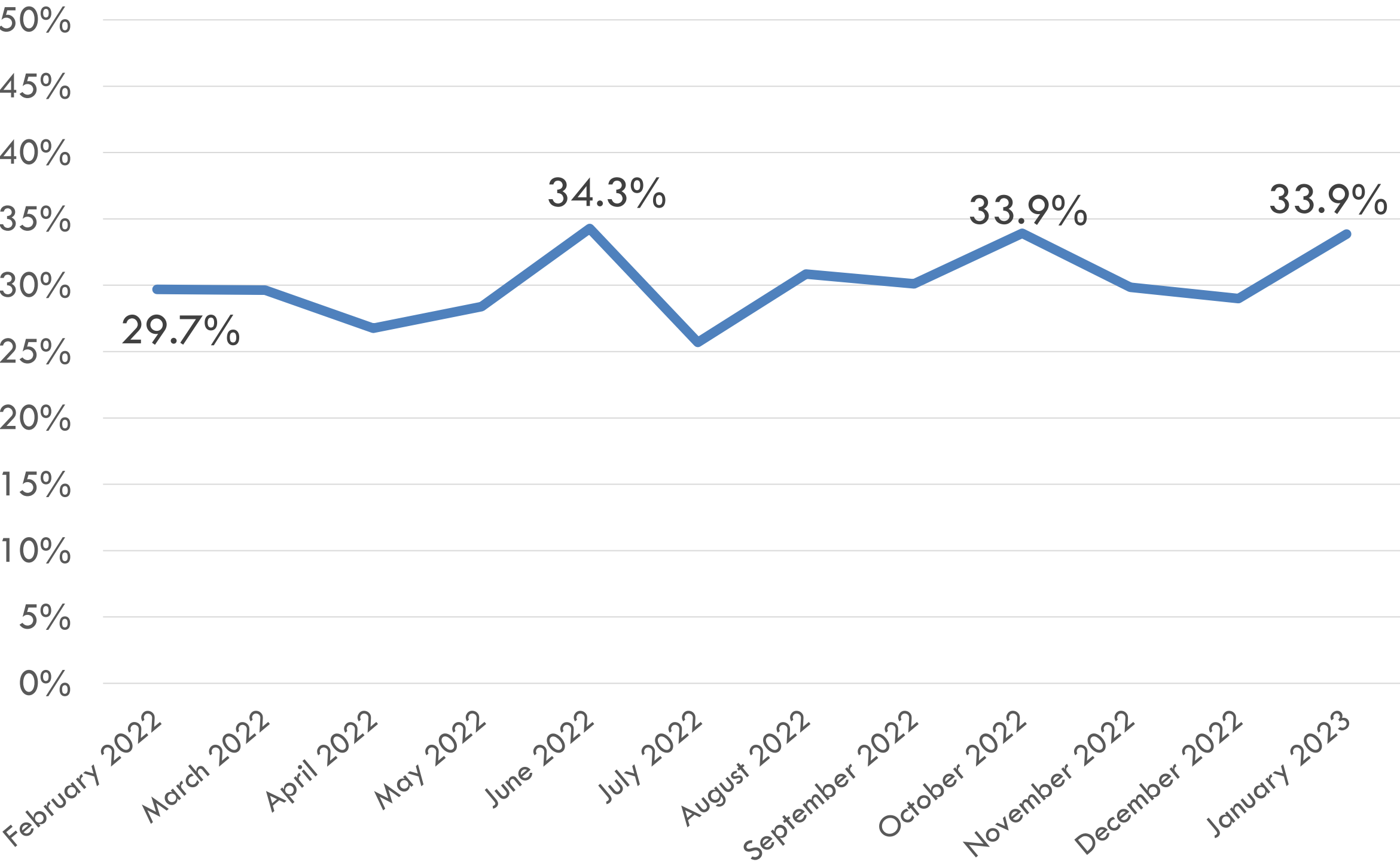


LIKELIHOOD TO TRAVEL ABROAD THIS YEAR

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



Historical data % Top-Two Box

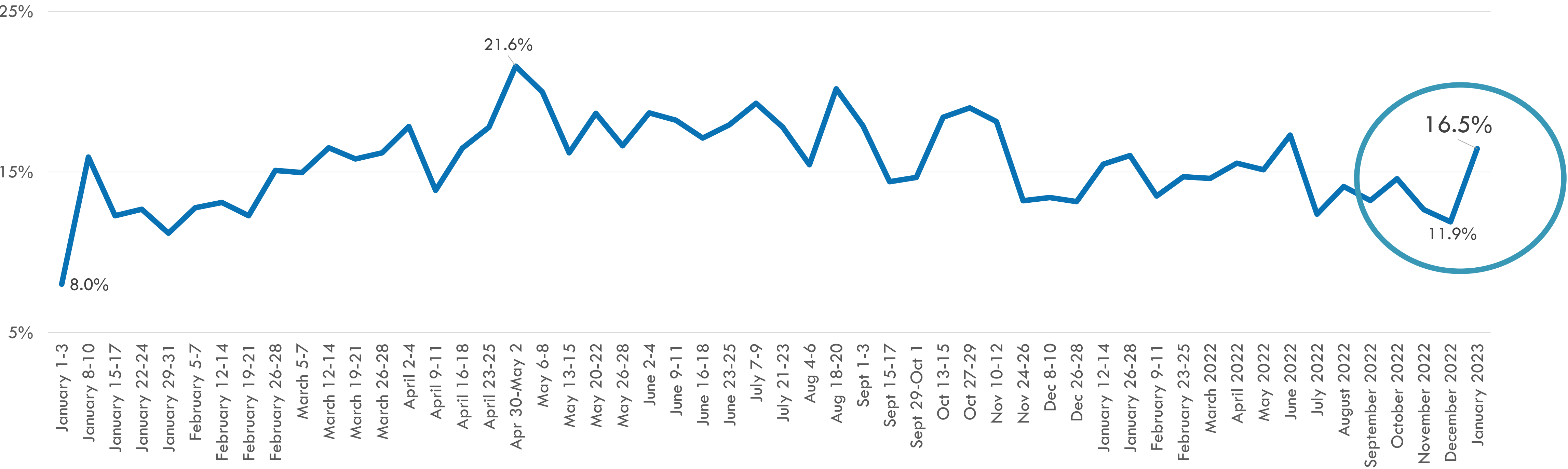


MADE TRAVEL RESERVATIONS IN THE PAST WEEK

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

In the PAST WEEK I have _____

—Made travel reservations (lodging, transportation, tickets, etc.)



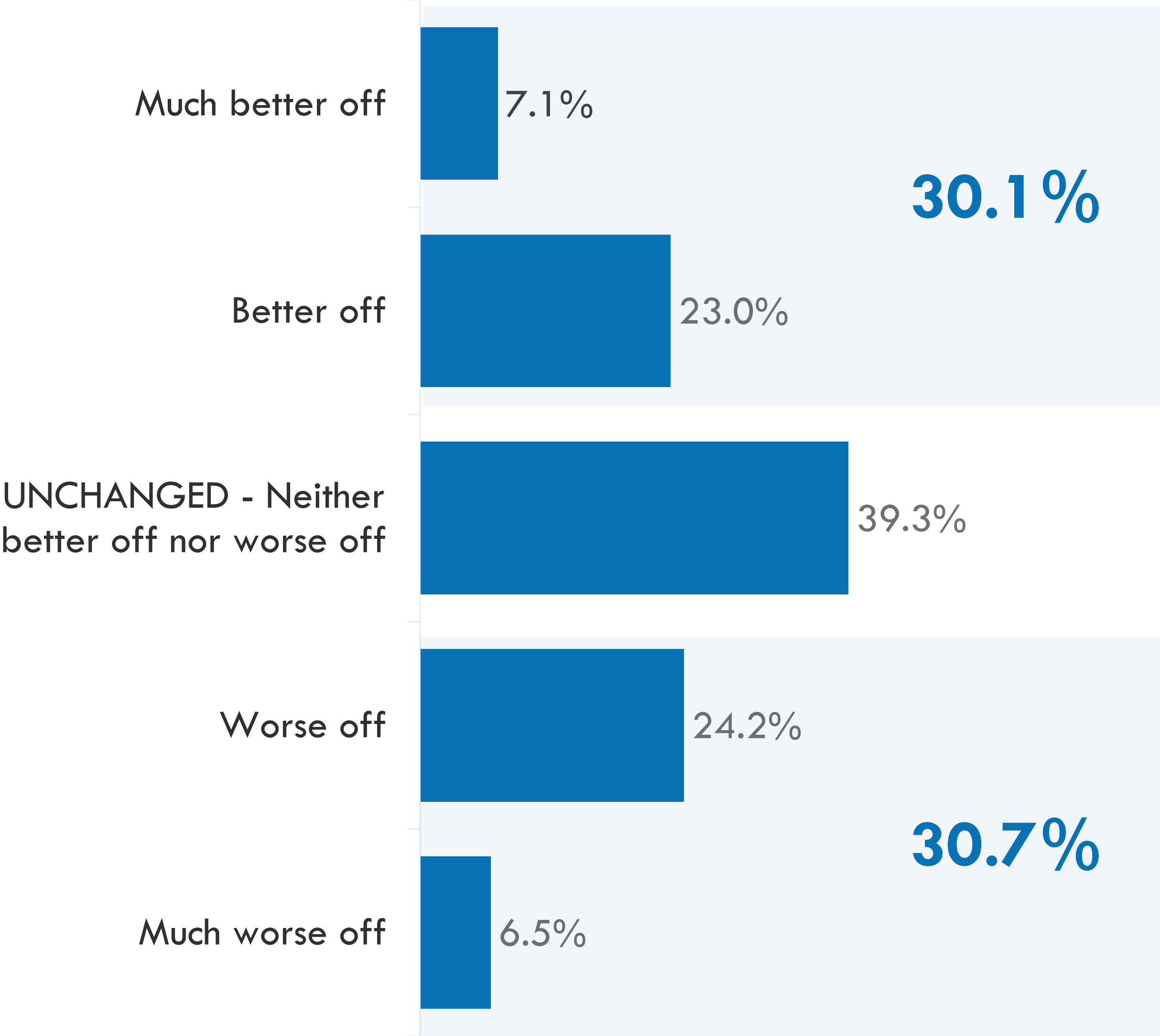
A hand is shown holding a coin, poised to drop it into a glass jar that is already filled with coins. In the foreground, several stacks of coins are arranged on a dark surface, with more coins scattered around them. The background is blurred, showing a person in a white shirt and a bright, out-of-focus light source. The text "ECONOMIC CONCERNS" is overlaid in a white box across the middle of the image.

ECONOMIC CONCERNS

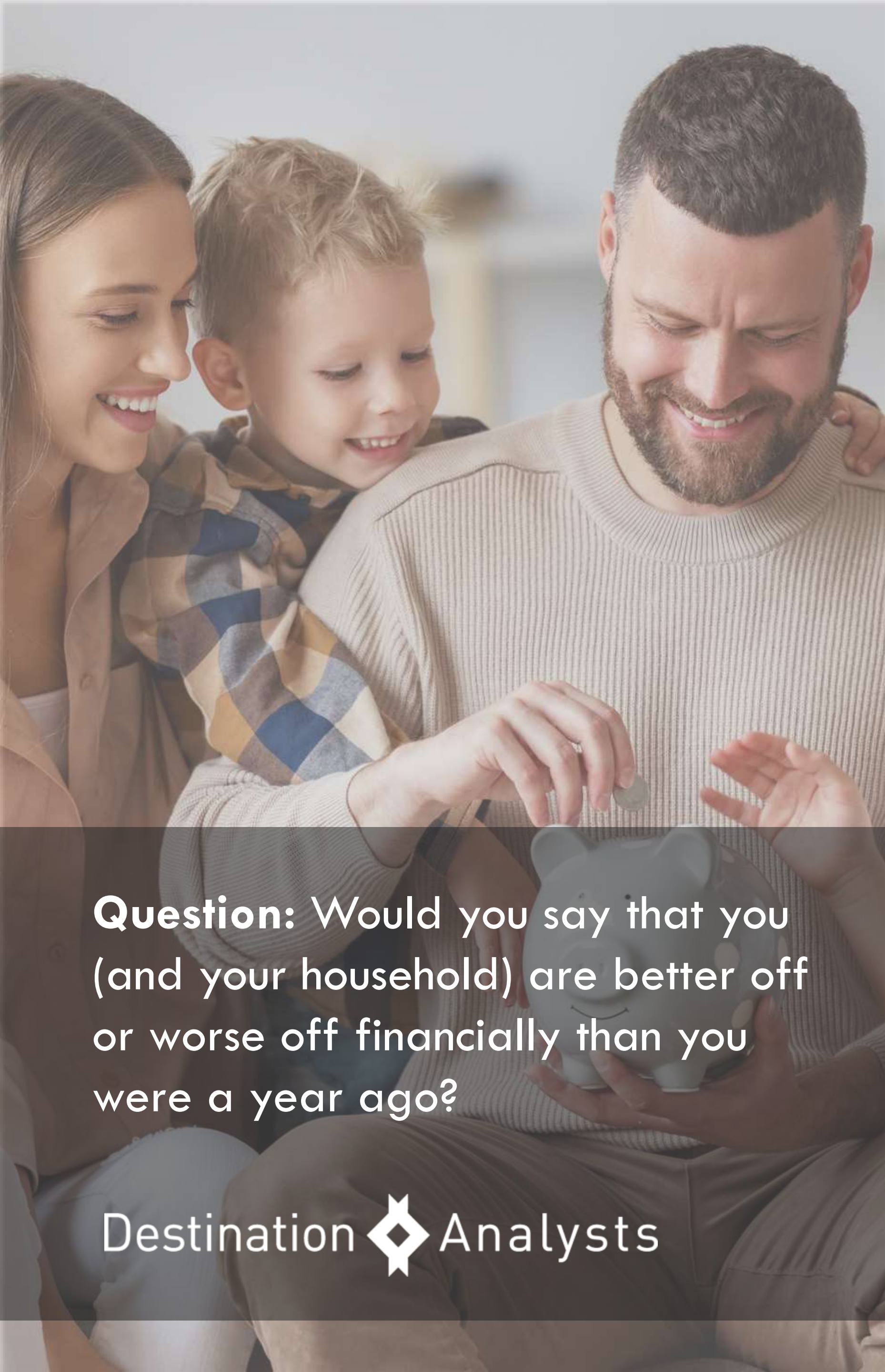


Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?

Destination  Analysts

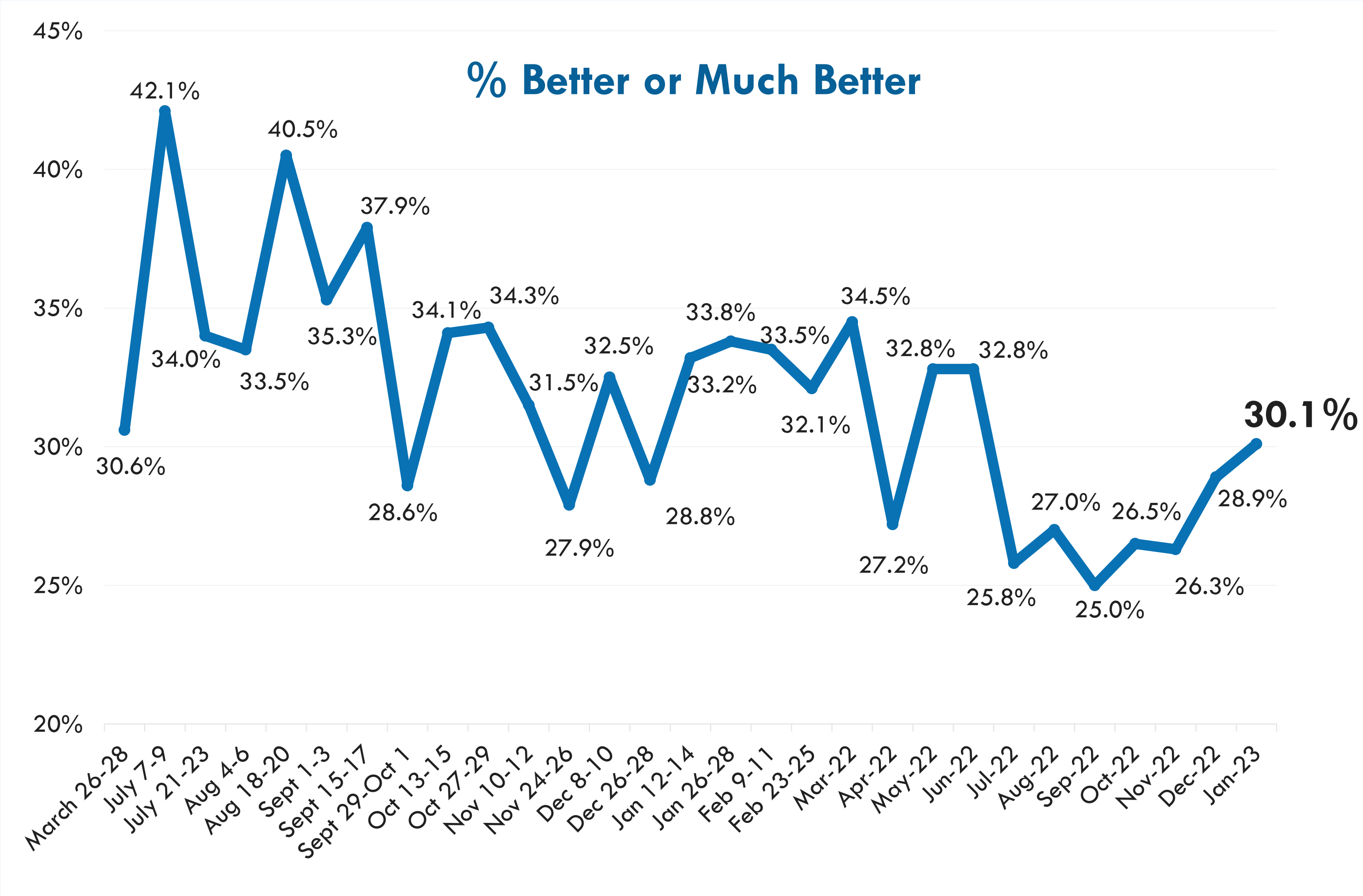


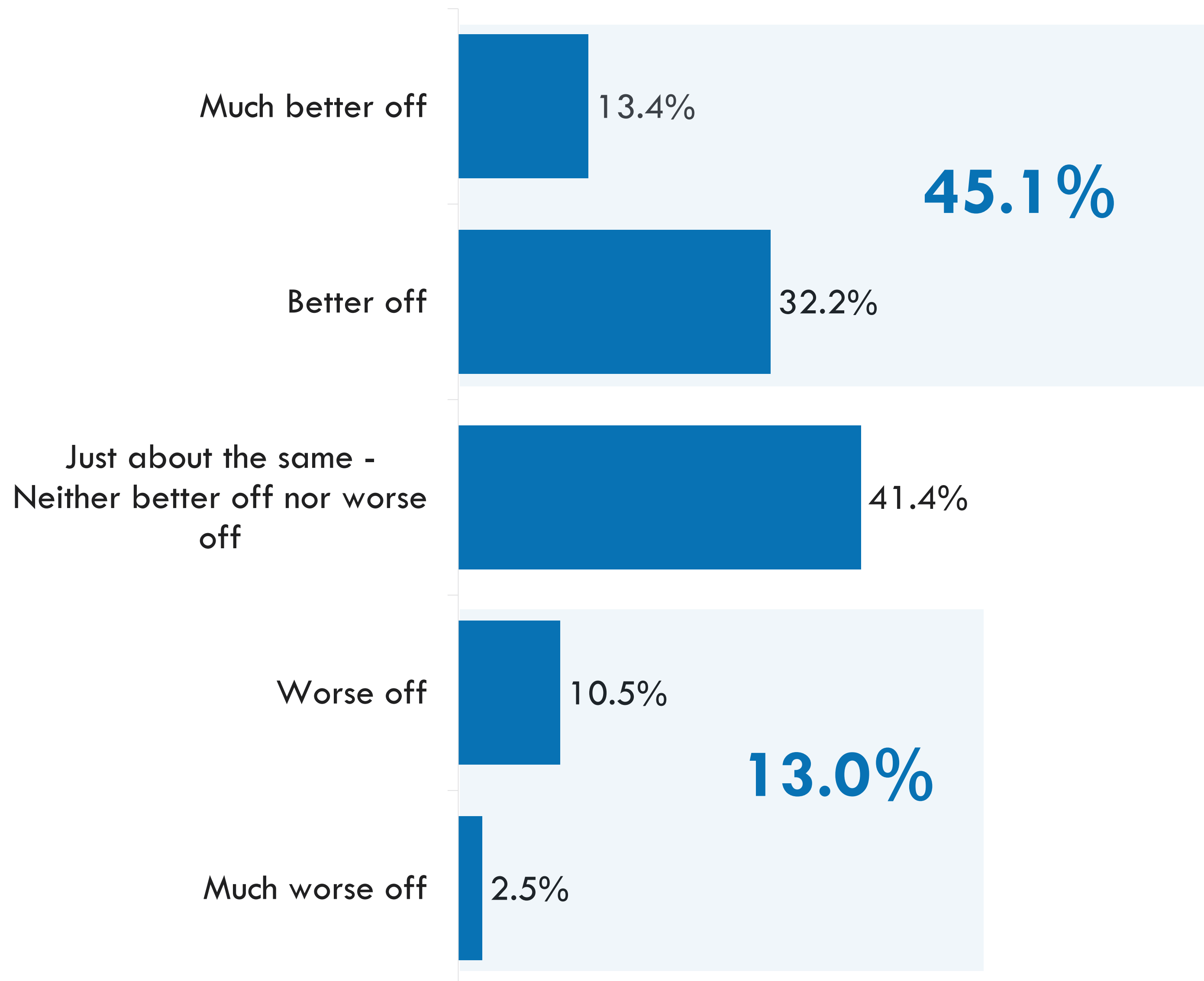
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)



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

In the last four months we have seen an improvement in traveler sentiment regarding their current financial situation.



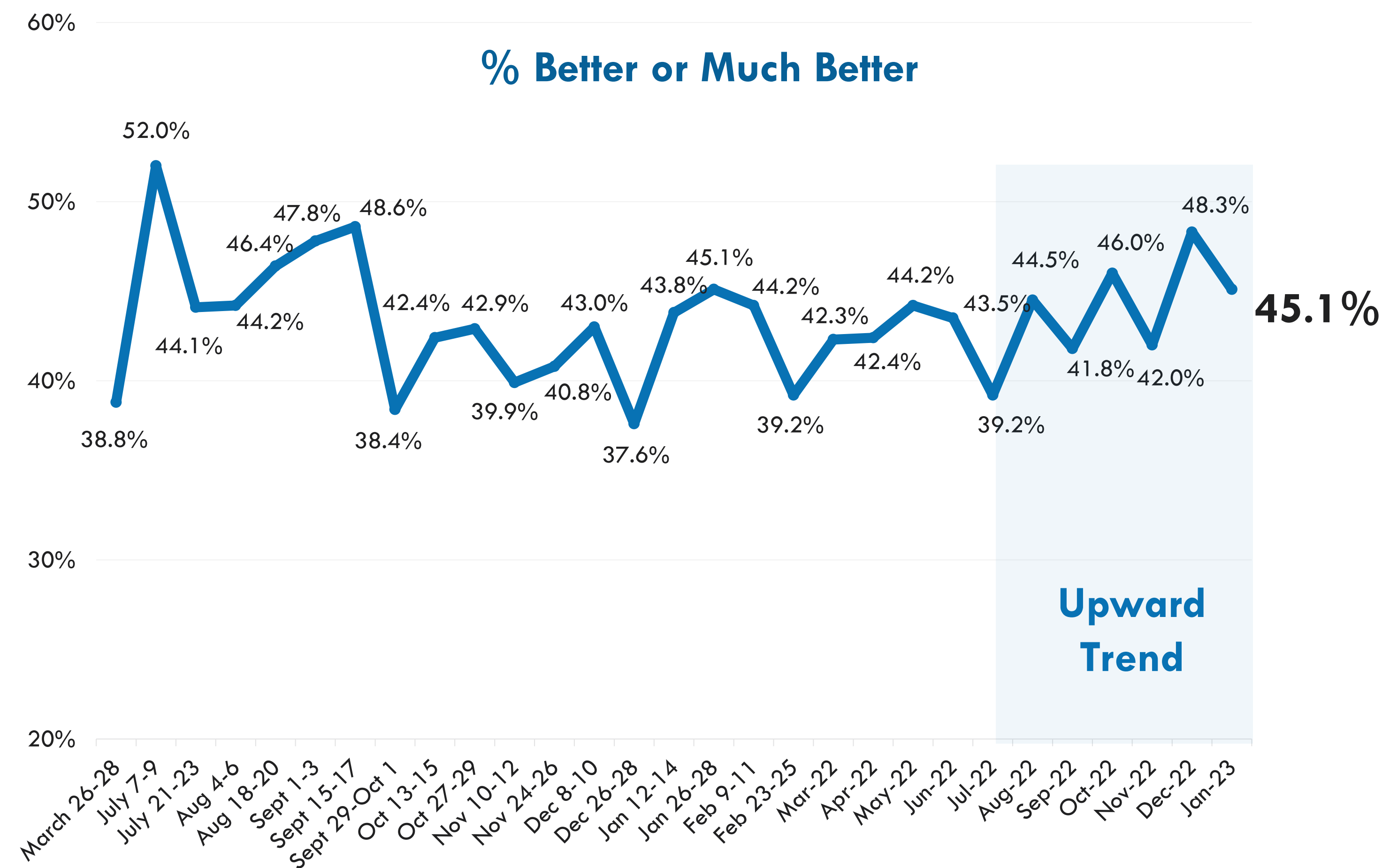


(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

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?

Destination  Analysts

Traveler expectations for their financial prospects in the next year dipped this month.



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?



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?

Destination  Analysts

Yes - It is a very good time

7.0%

30.4%

Yes - It is a good time

23.4%

It is neither a good time nor bad time

37.2%

No - It is a bad time

20.8%

No - It is a very bad time

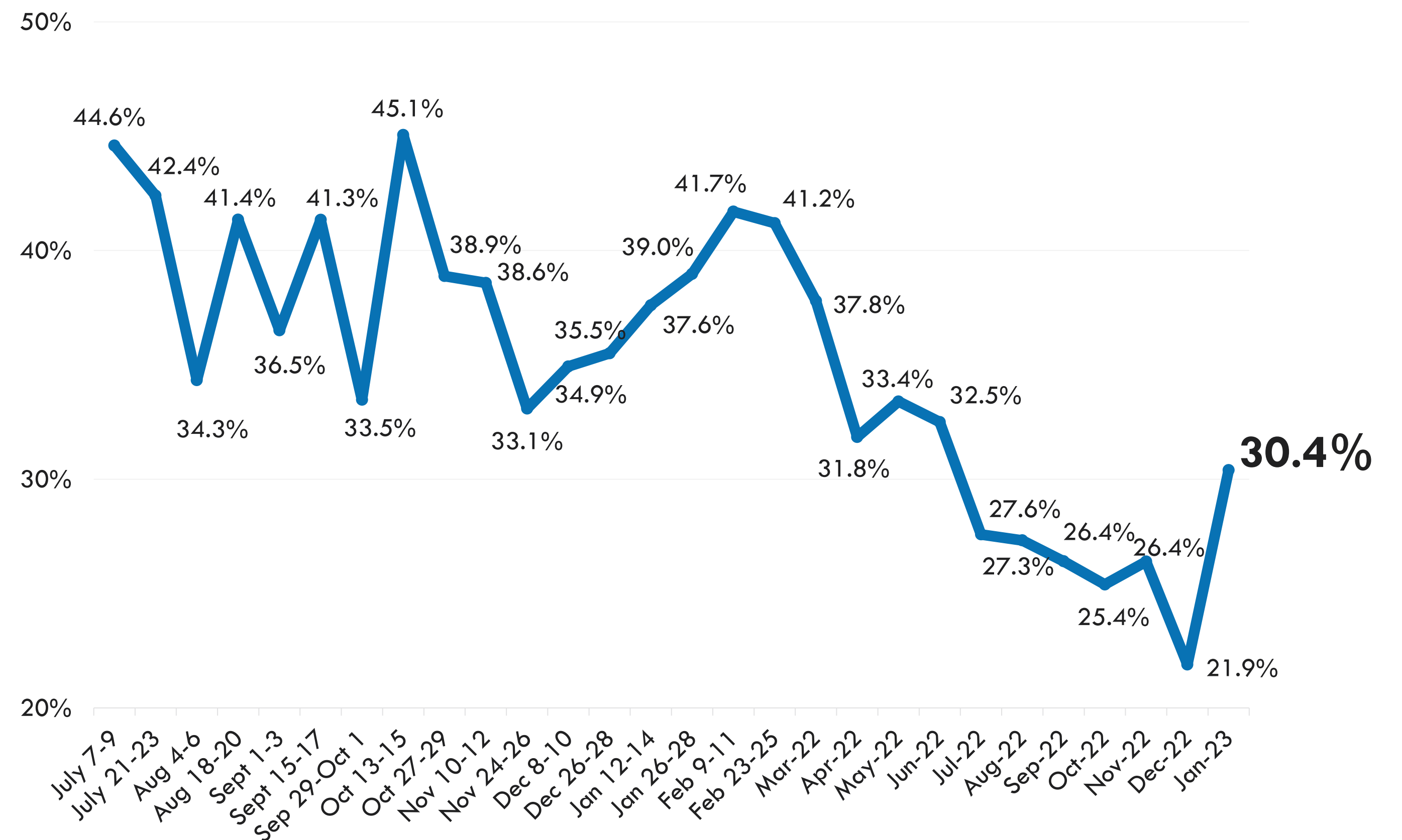
11.6%

32.4%

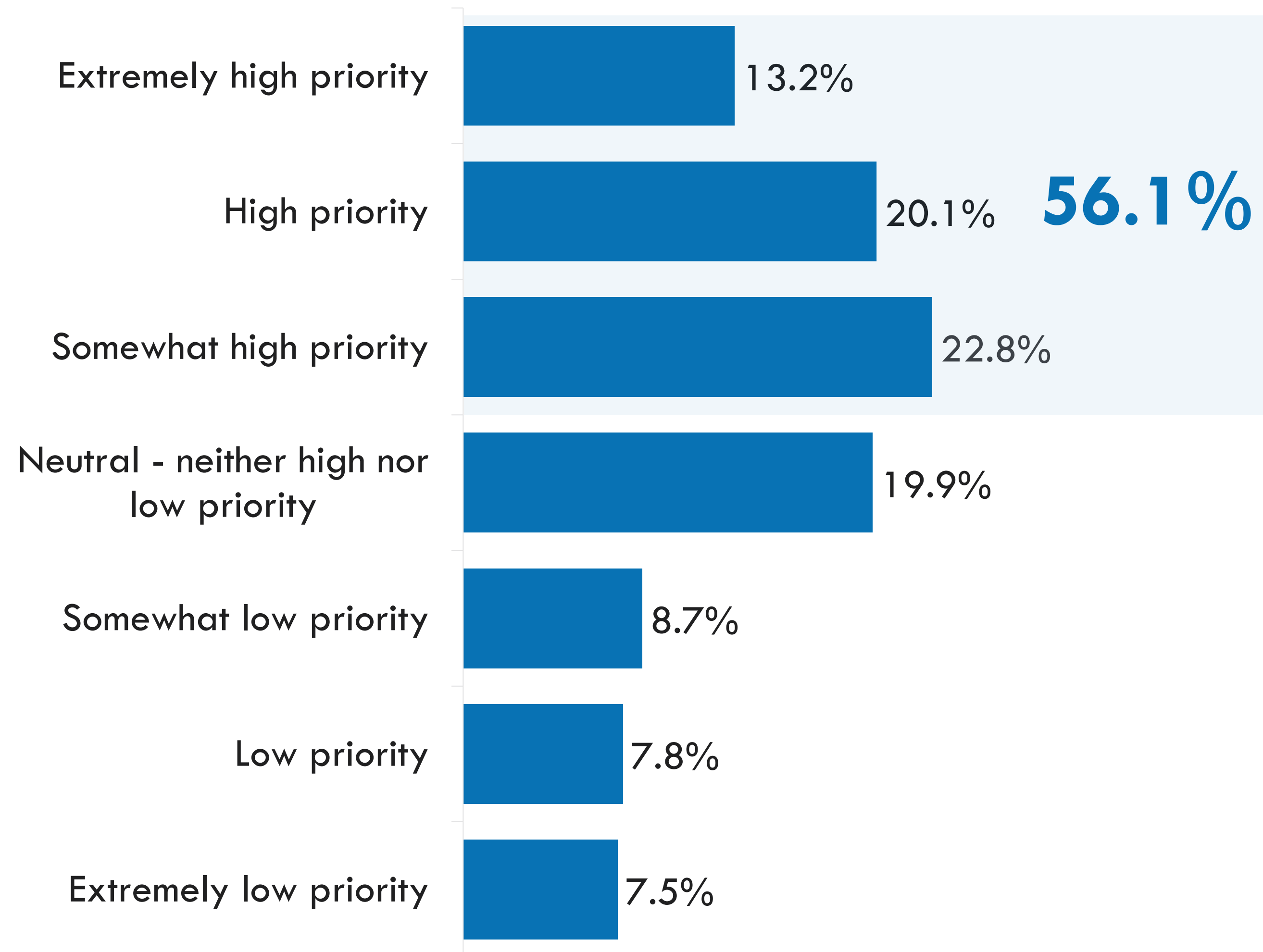
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

The proportion of Americans who feel it is a “good time” to spend on leisure travel increased sharply this month.

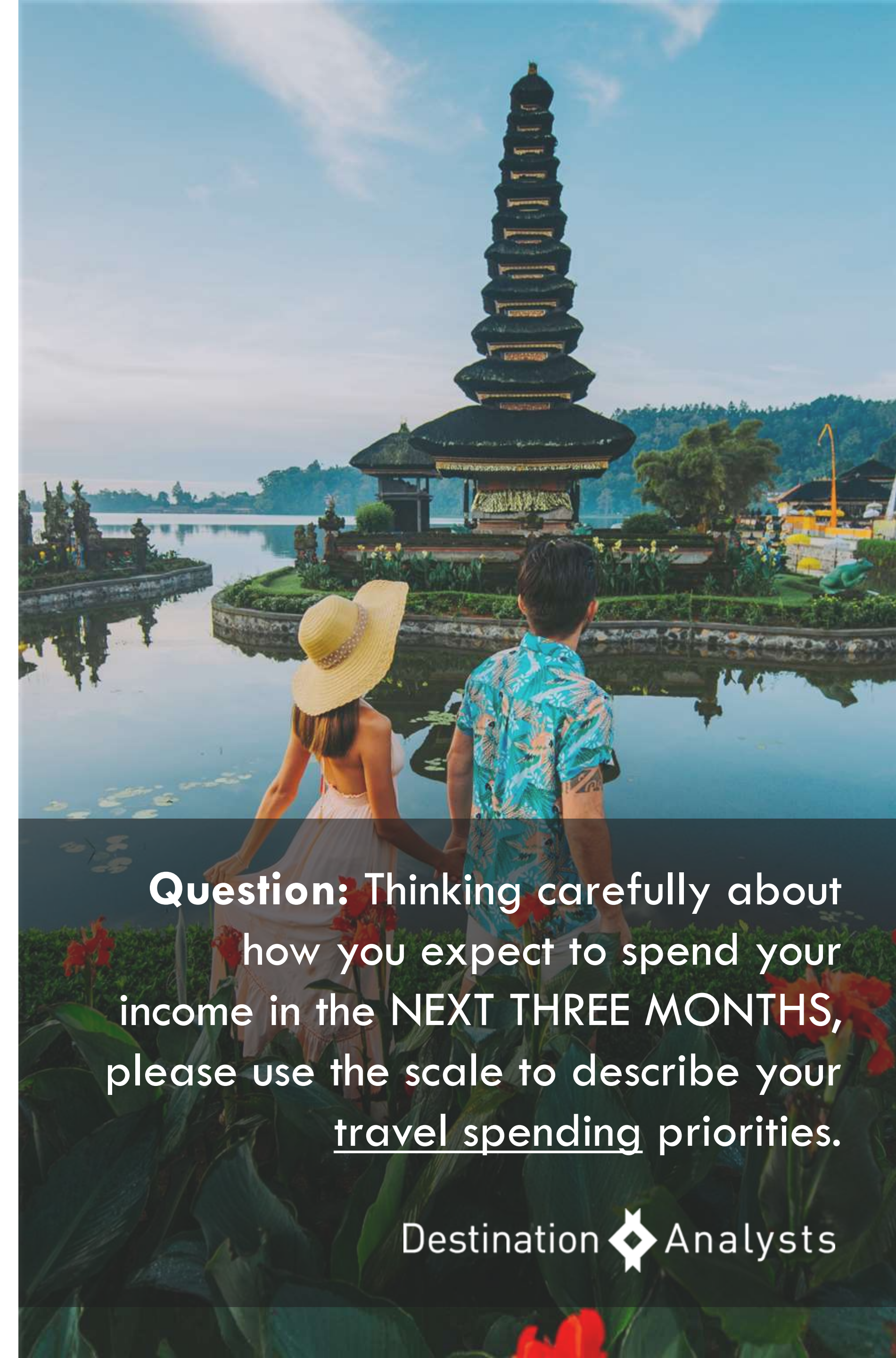
% Good or Very good time to spend on travel



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?



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

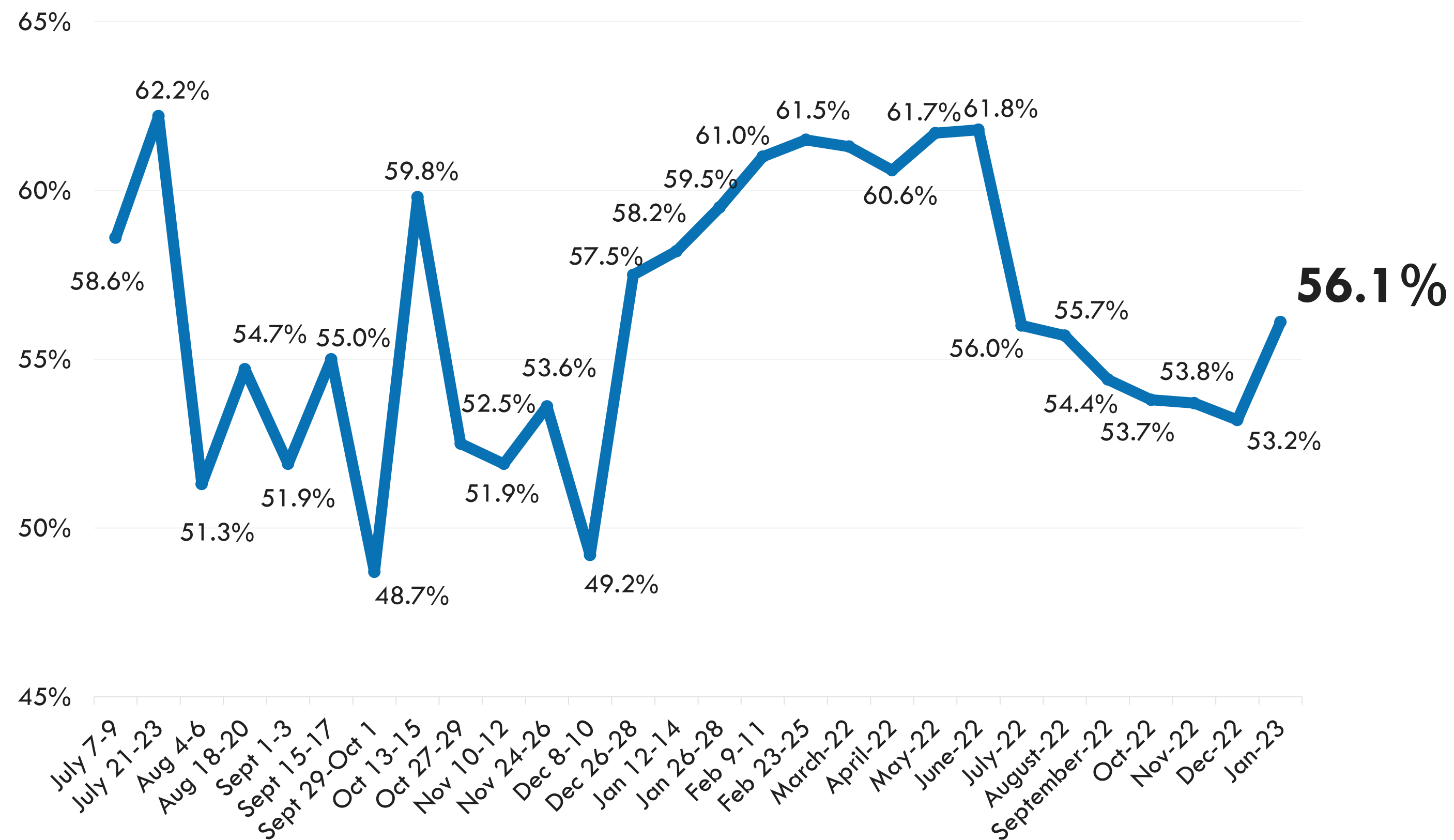


Question: Thinking carefully about how you expect to spend your income in the **NEXT THREE MONTHS**, please use the scale to describe your travel spending priorities.

Destination  Analysts

The long recent decline in leisure travel budget prioritization reversed itself dramatically this month.

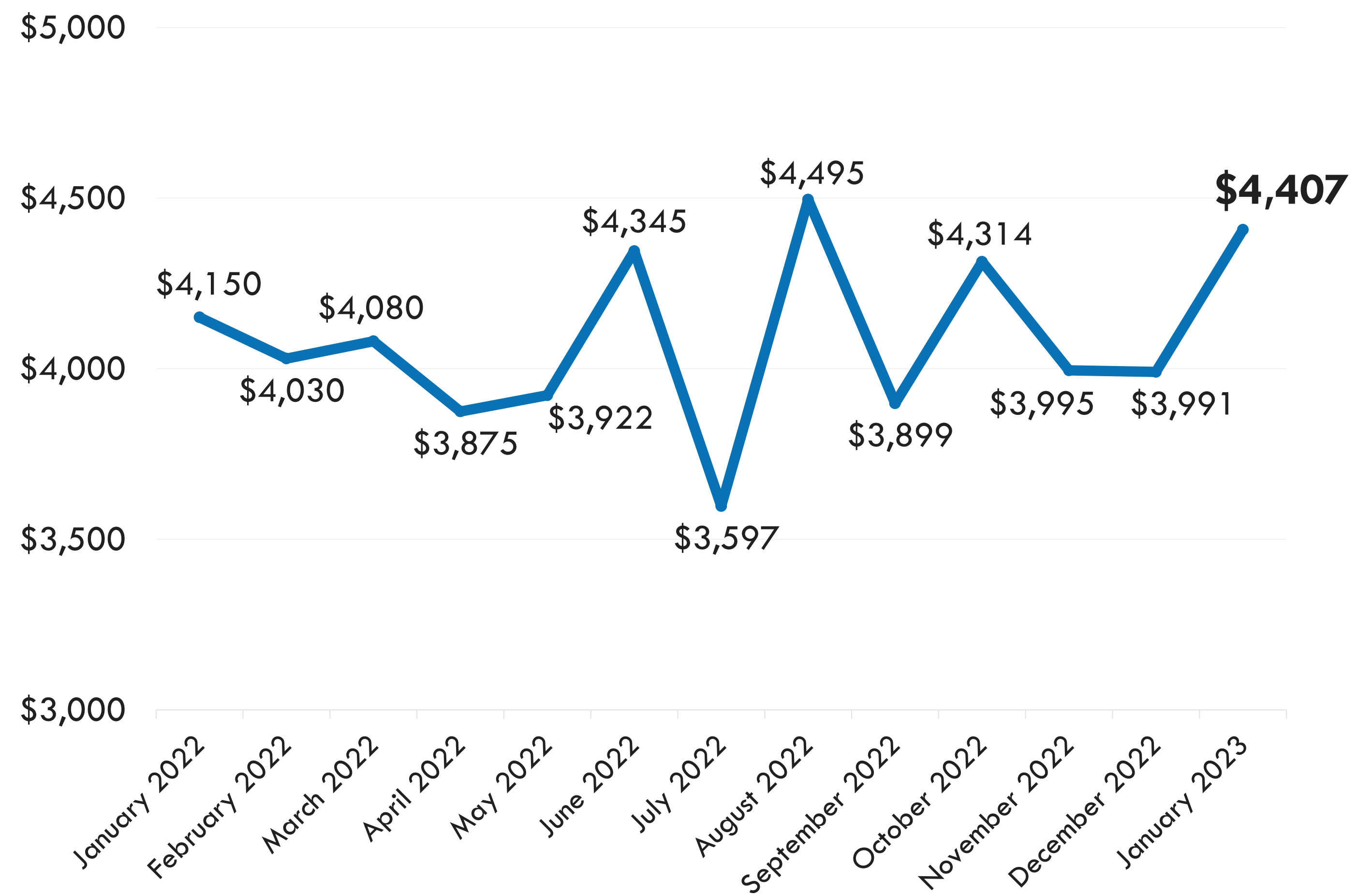
% Somewhat high, high or extremely high priority

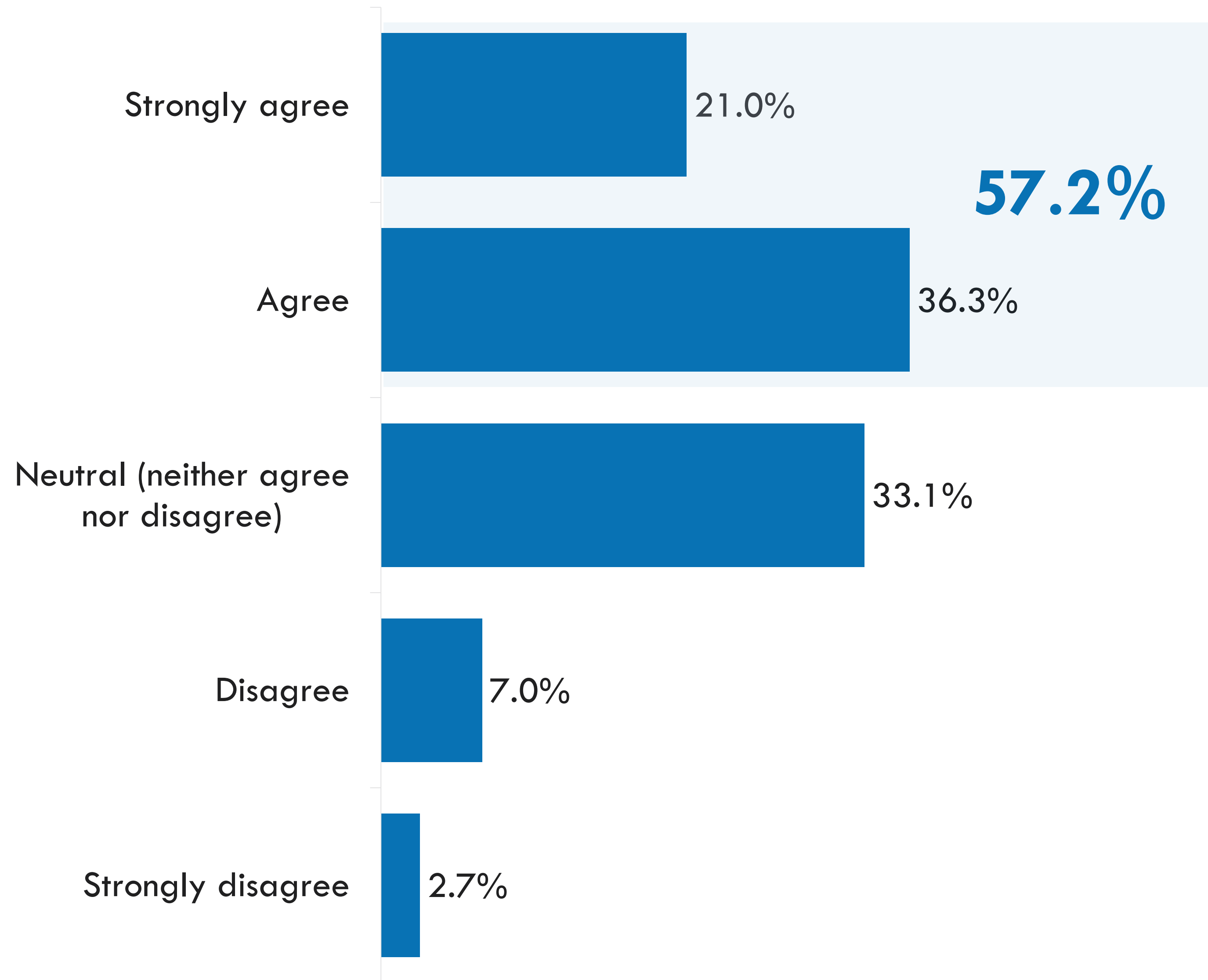


Question: Thinking carefully about how you expect to spend your income in the **NEXT THREE MONTHS**, please use the scale to describe your travel spending priorities.

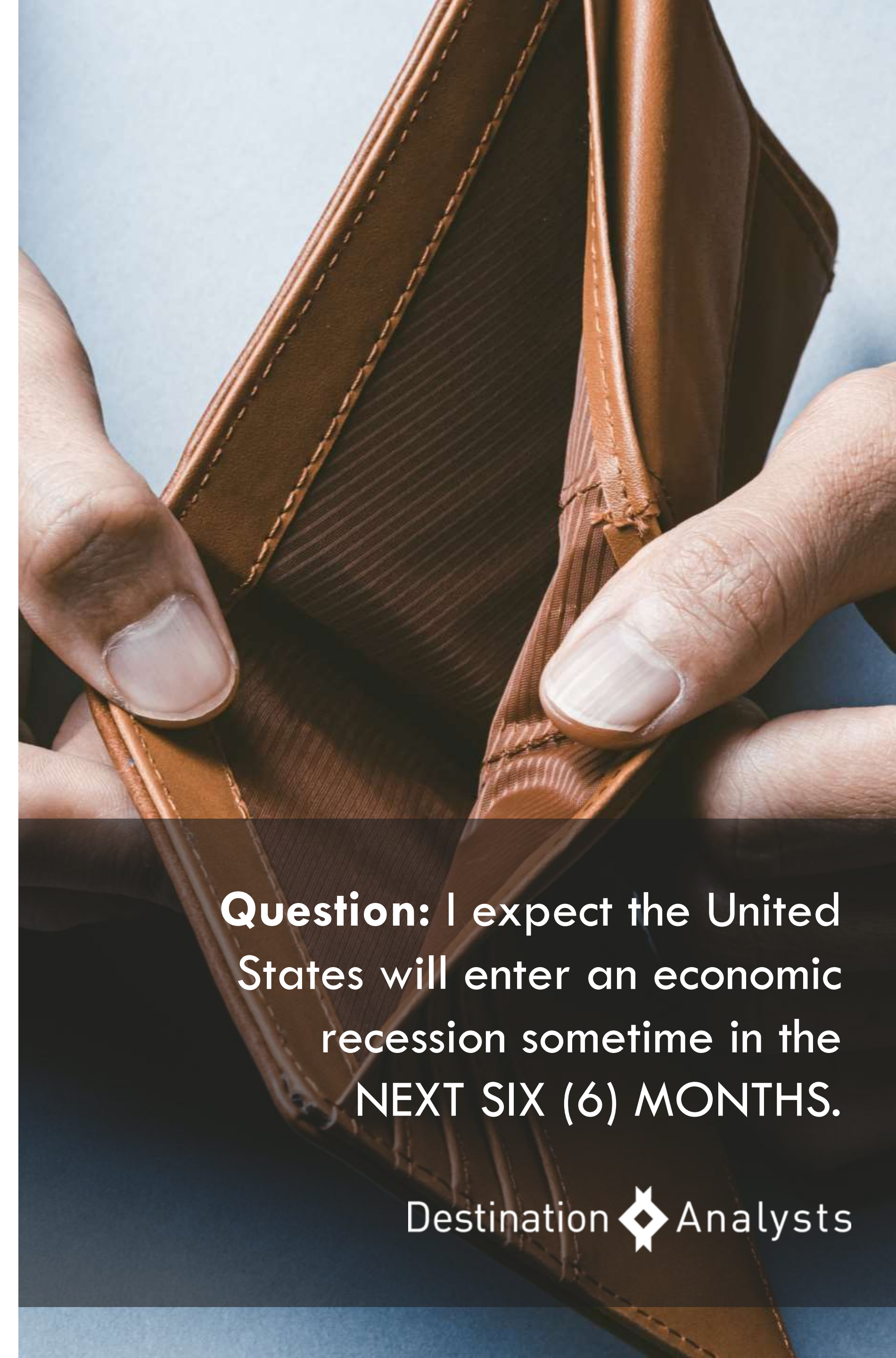
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

Maximum Expected Annual Travel Budget





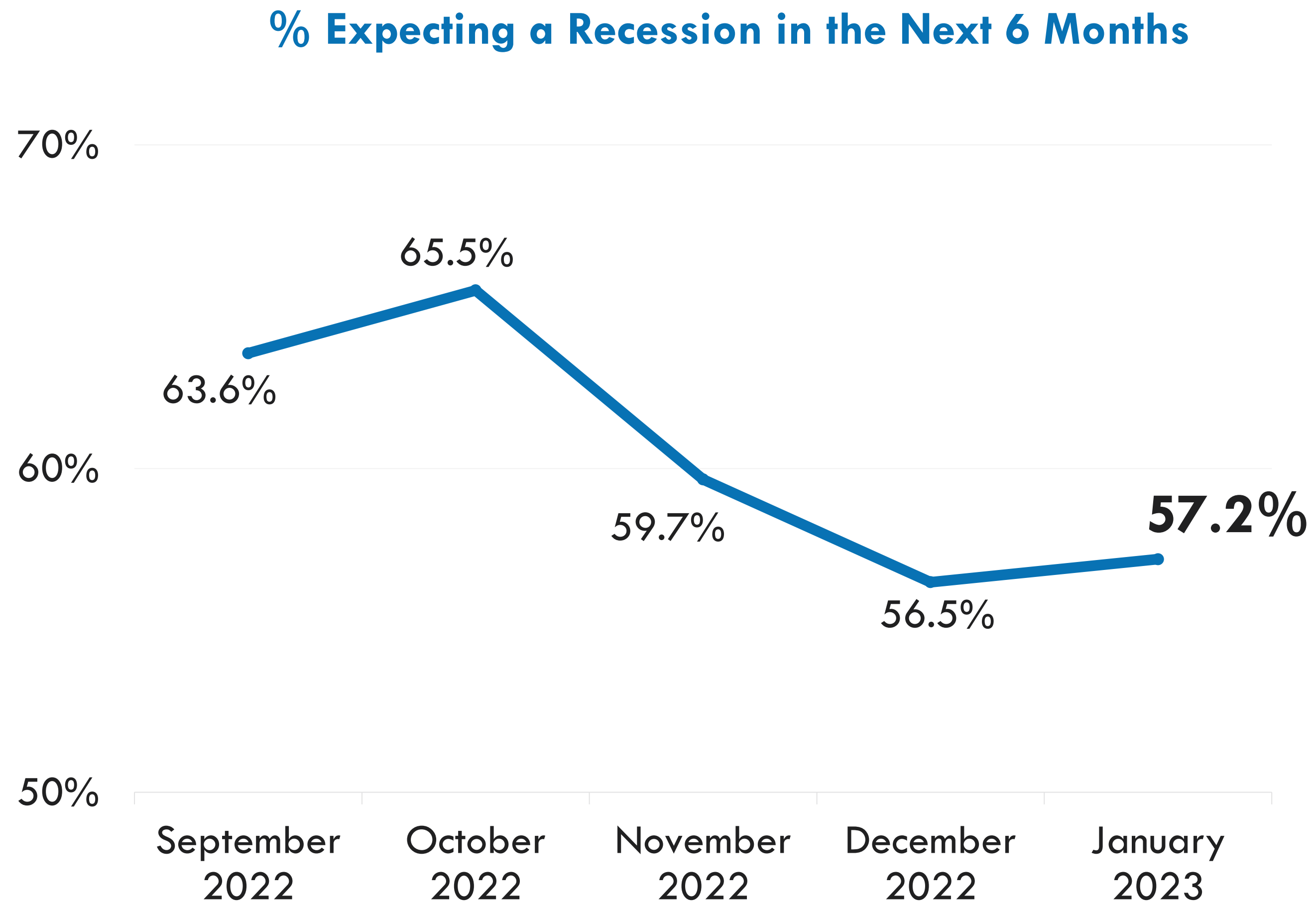
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)



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

Destination  Analysts

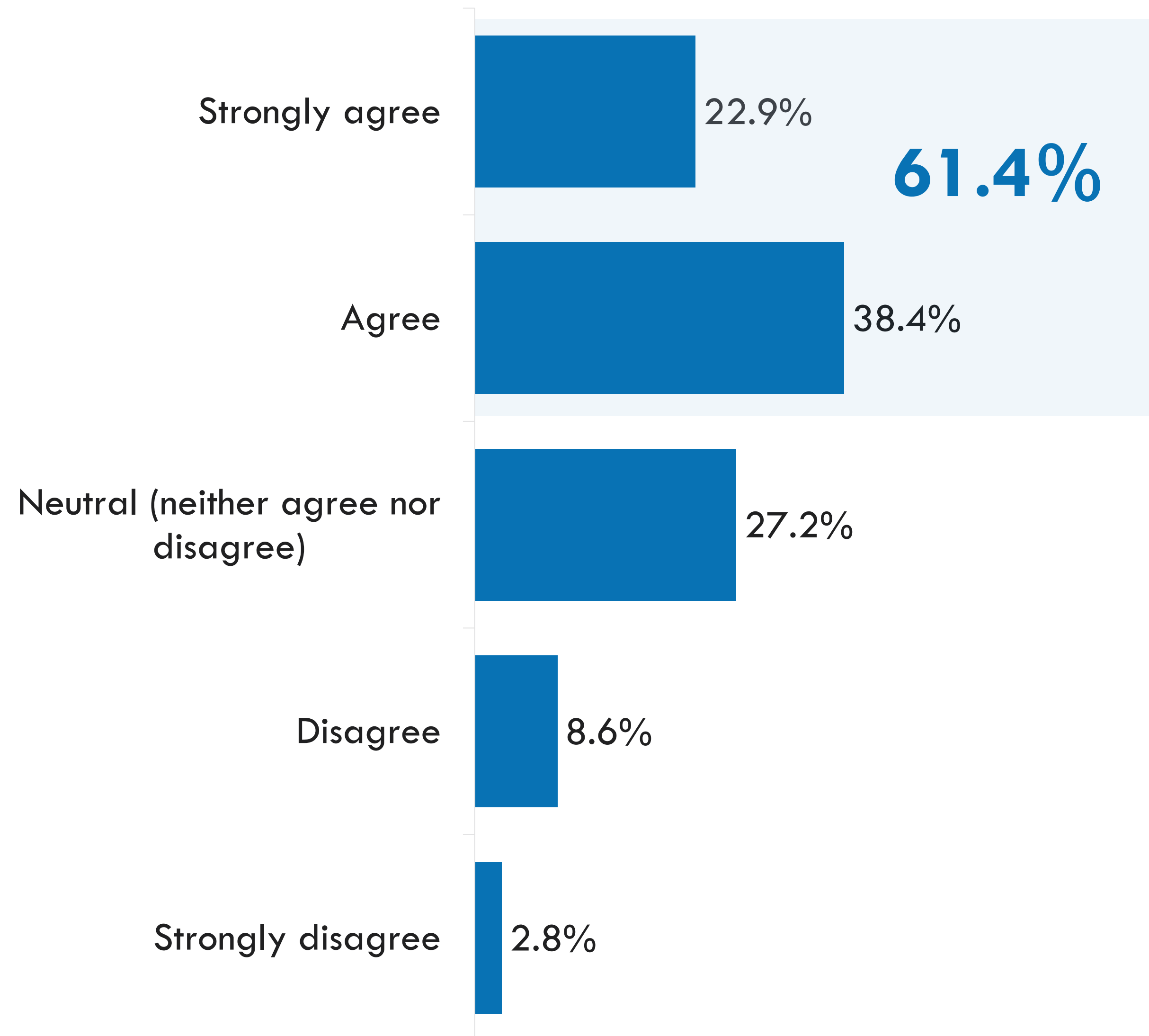
Recessionary fears held constant this month.



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

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

Destination  Analysts



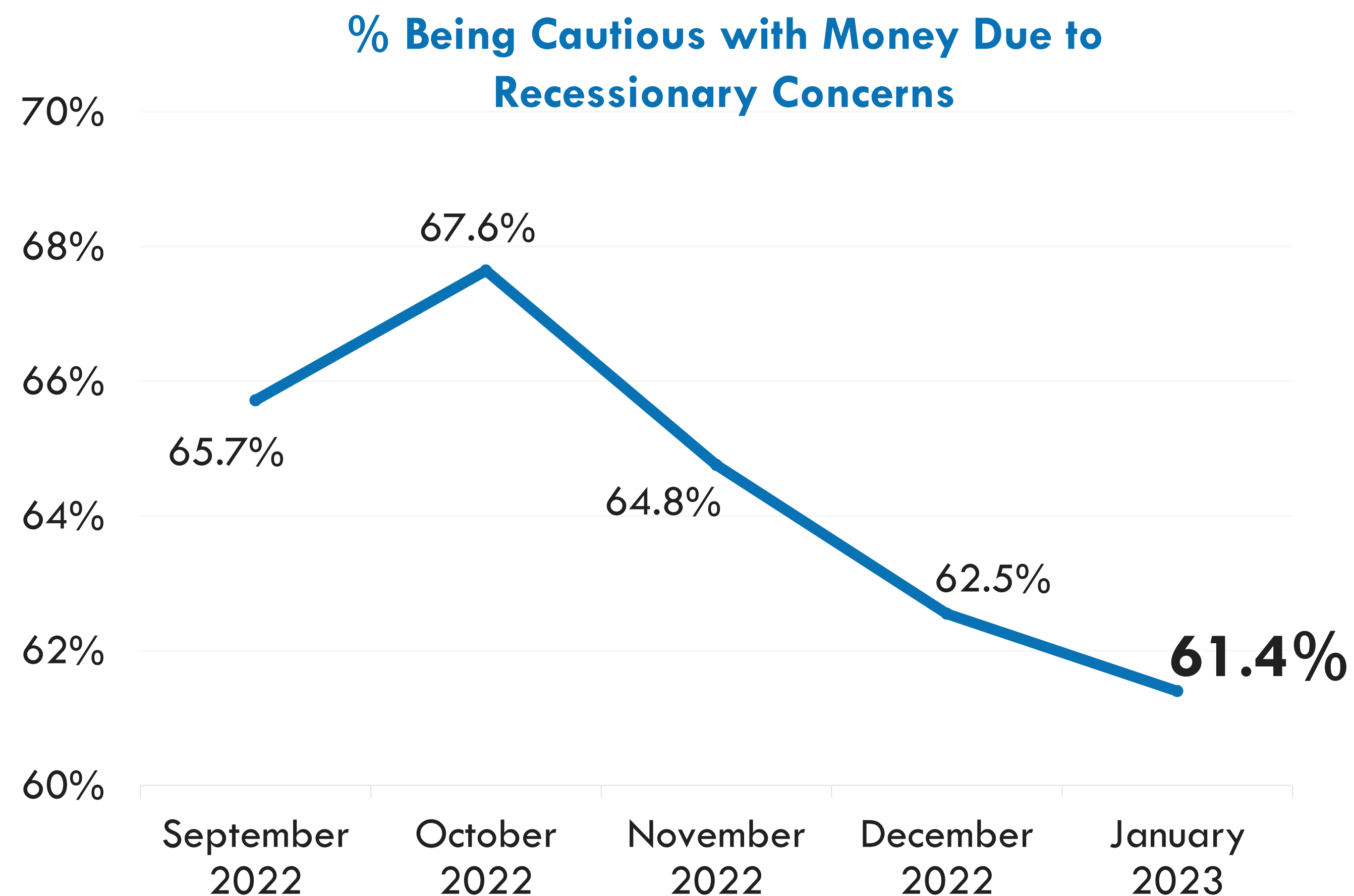
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)



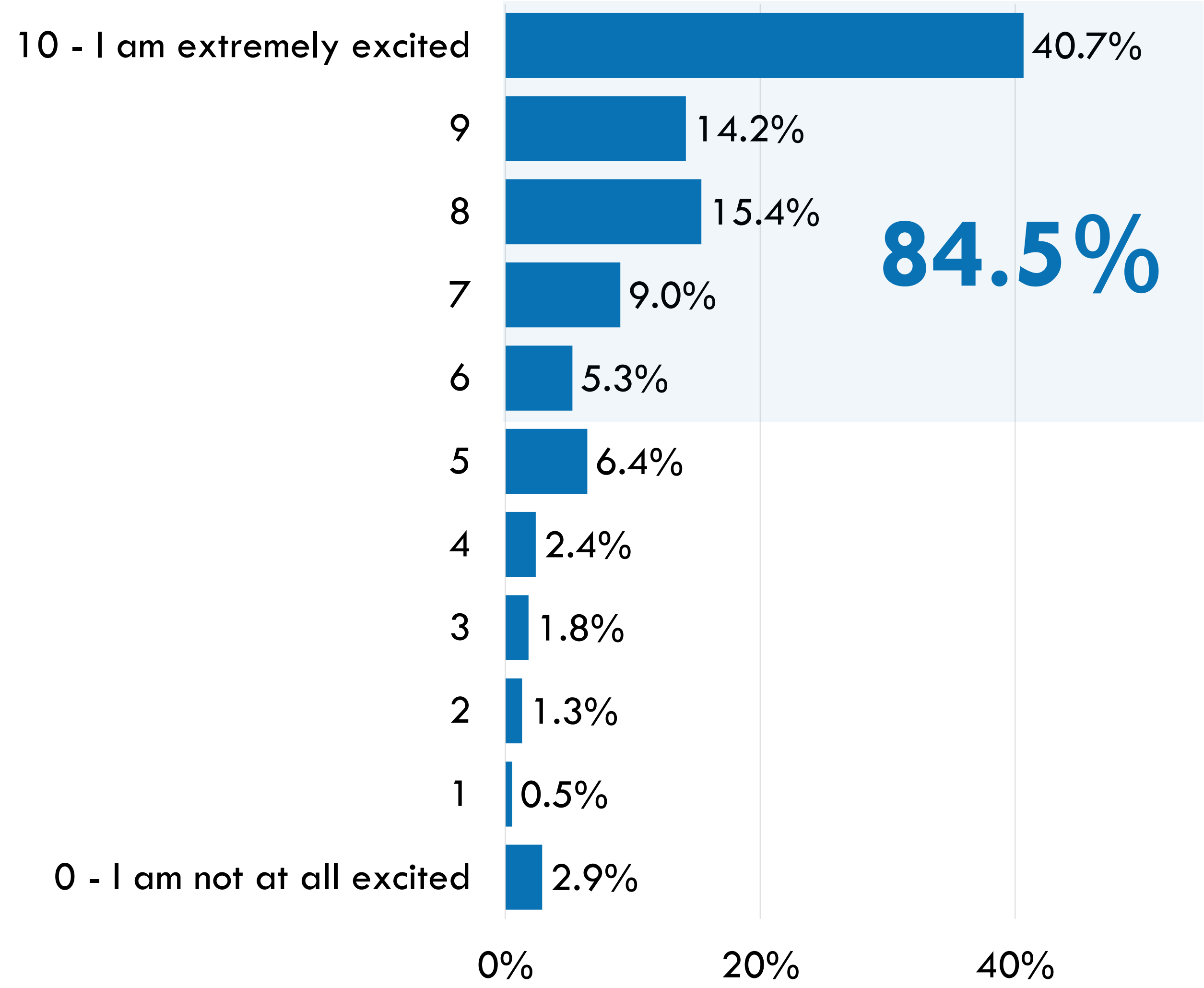
Statement: “Right now, I am being careful with my money because I’m concerned about an upcoming recession.”

Destination  Analysts

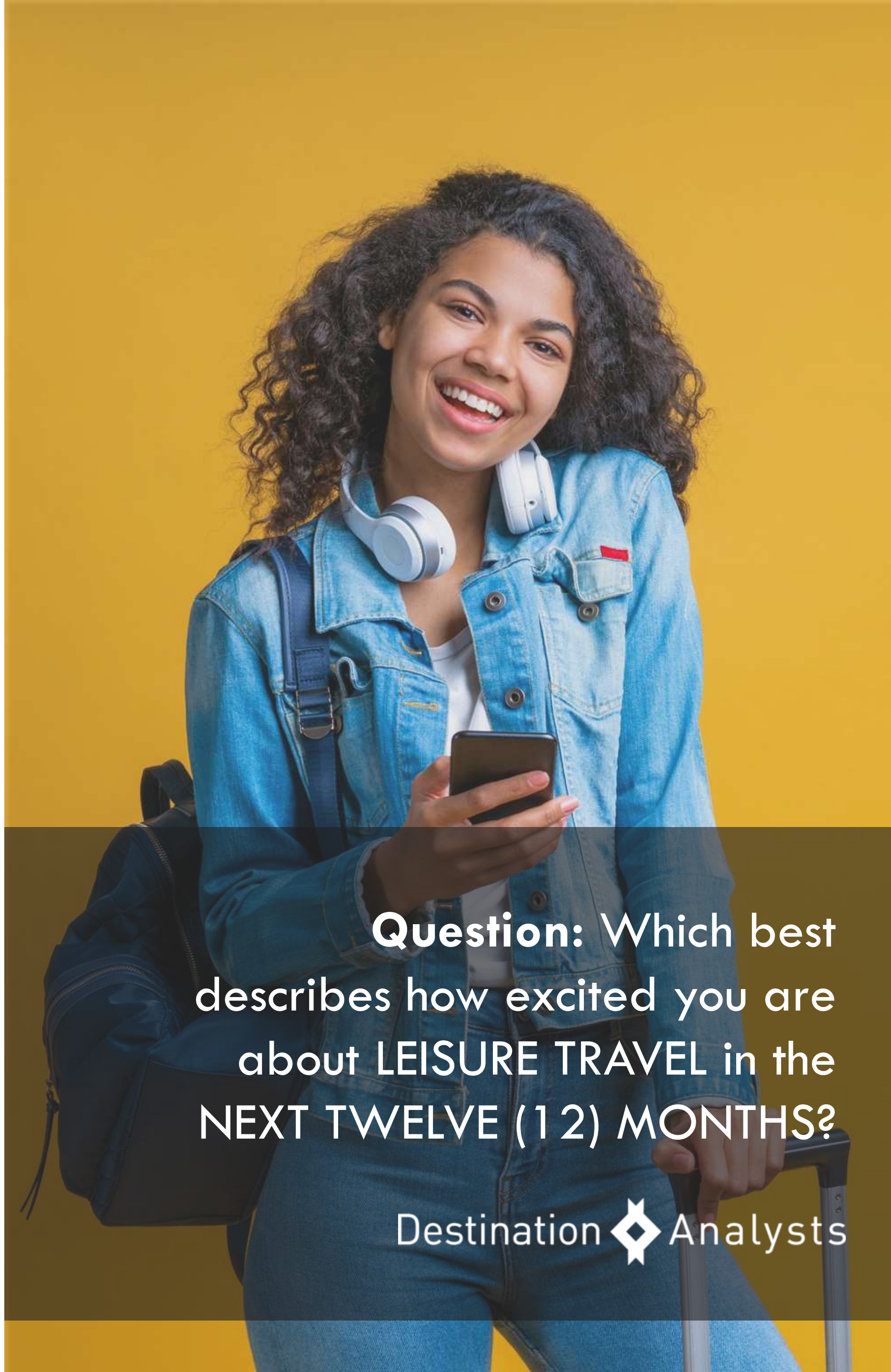
Slightly fewer travelers are exercising spending caution due to concerns about a recession.



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)



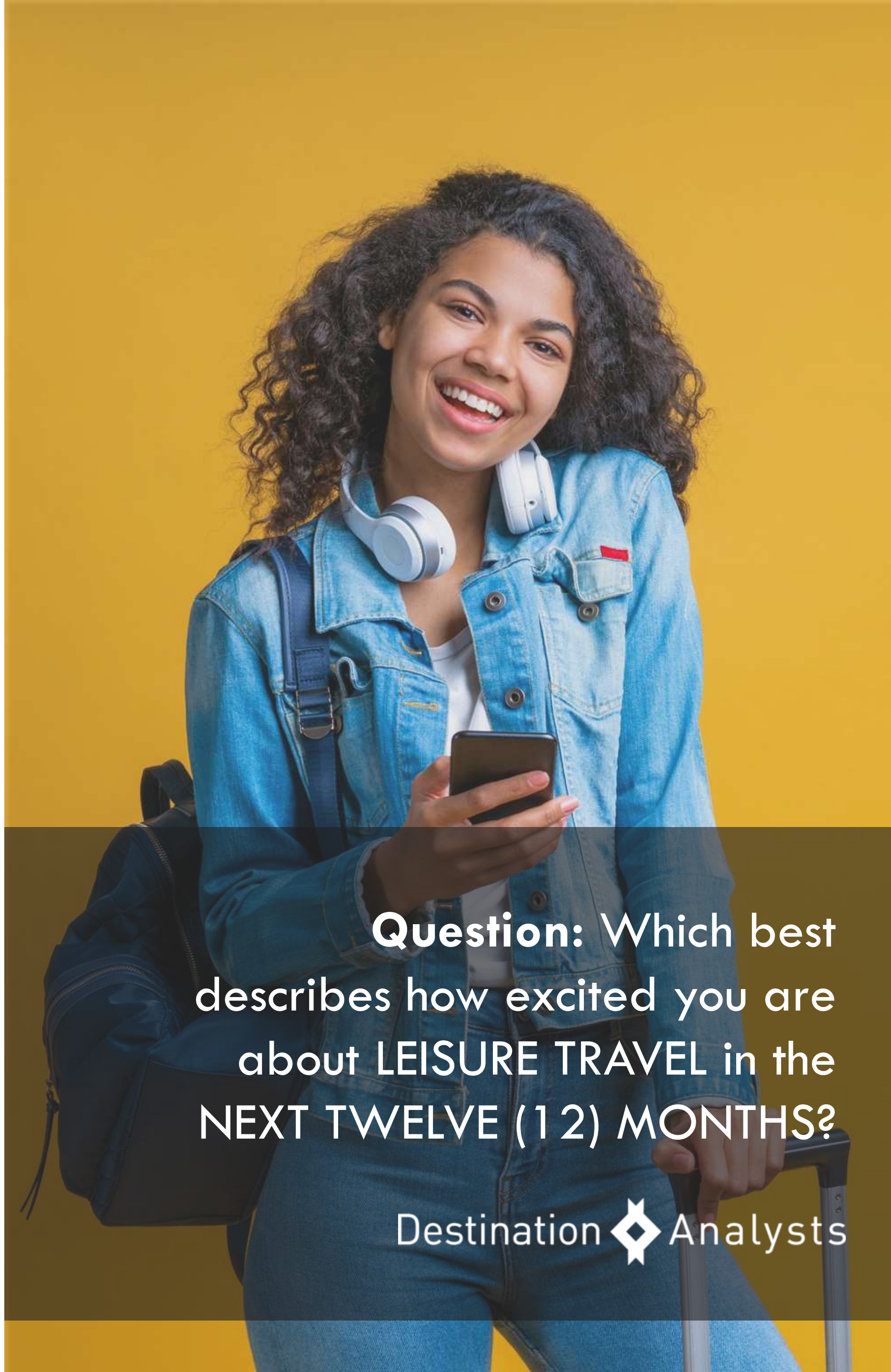
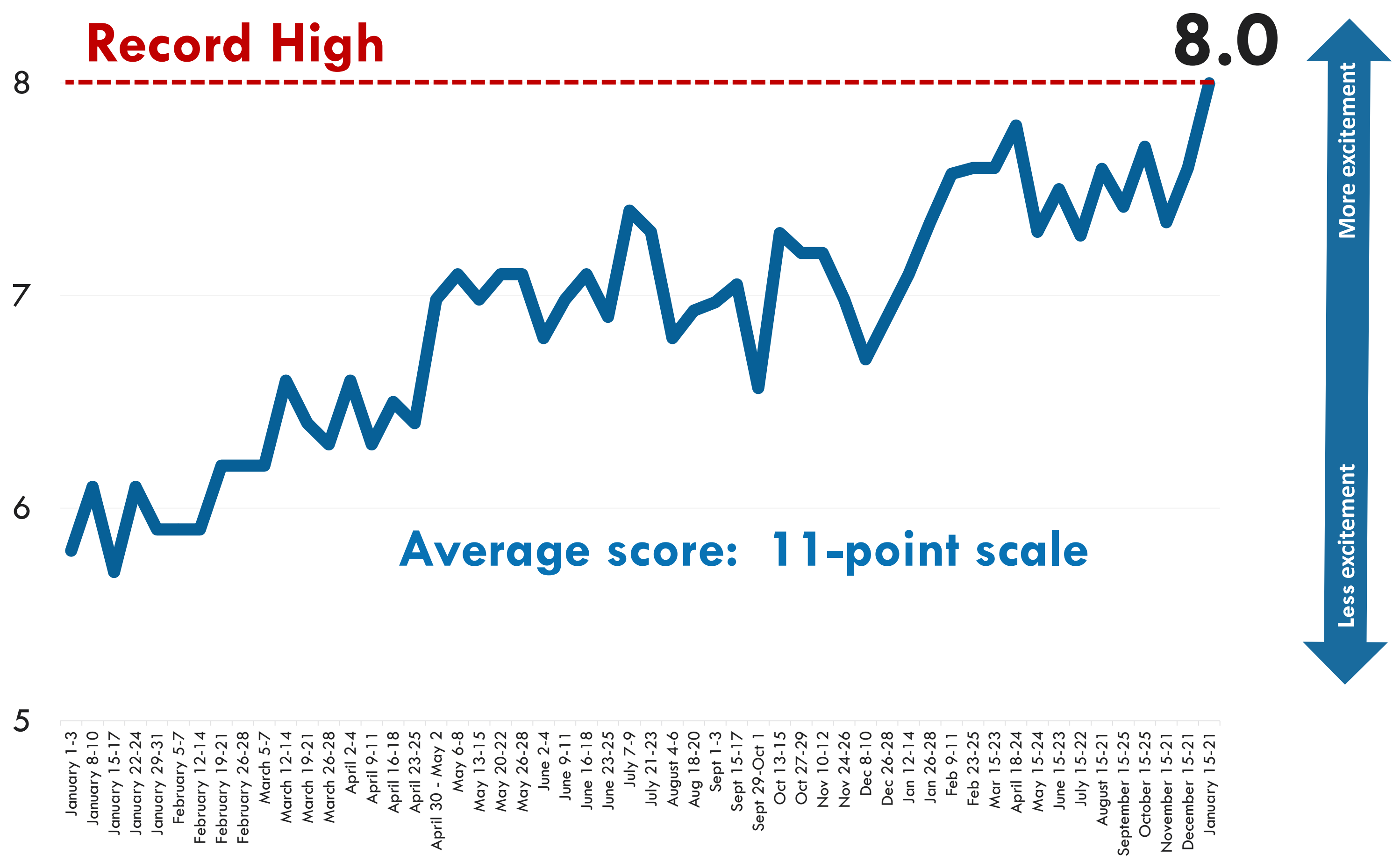
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)



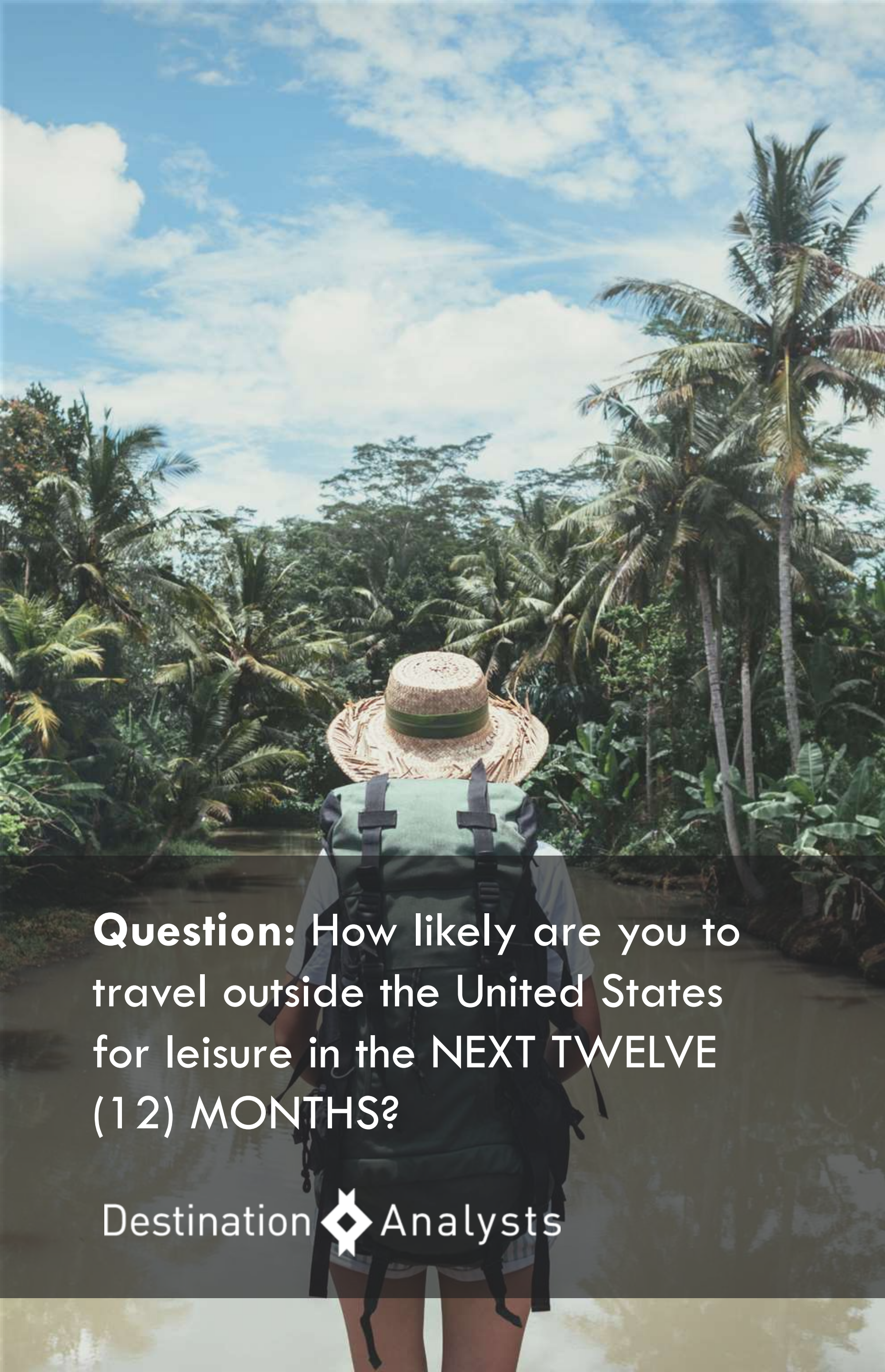
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?

Destination  Analysts

Excitement to travel for leisure reached a new record level this month.

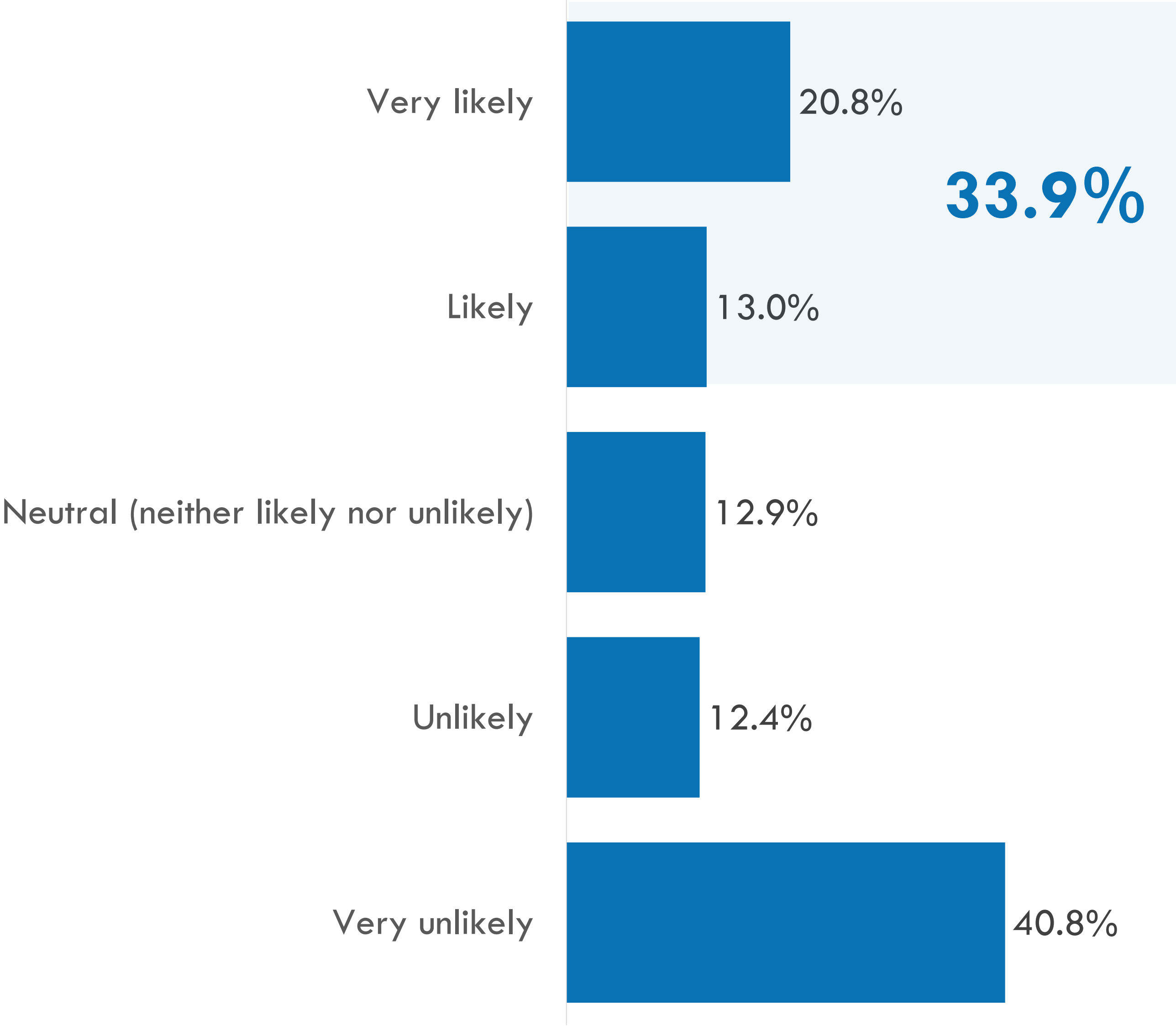


Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?

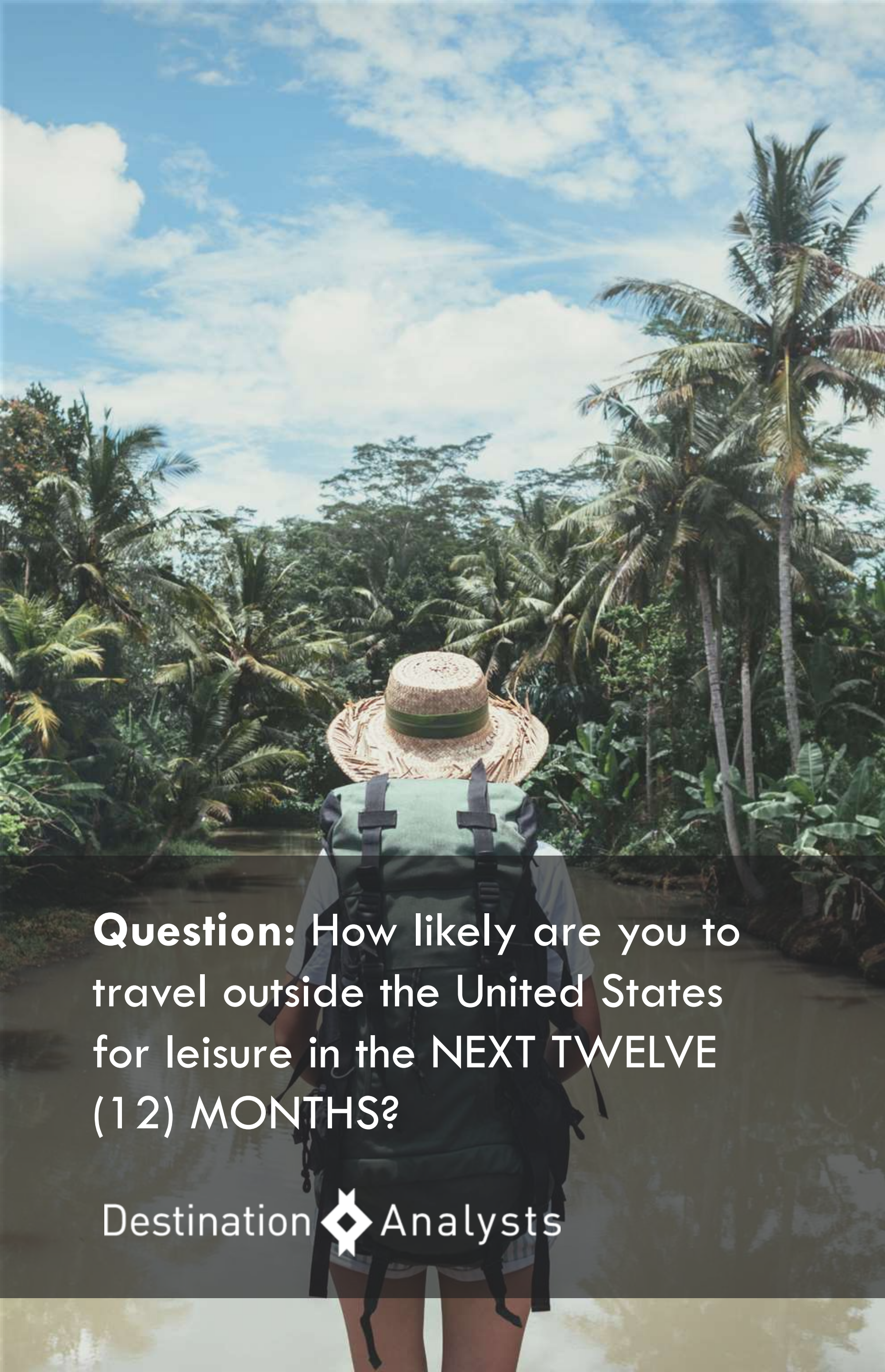


Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

Destination  Analysts



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

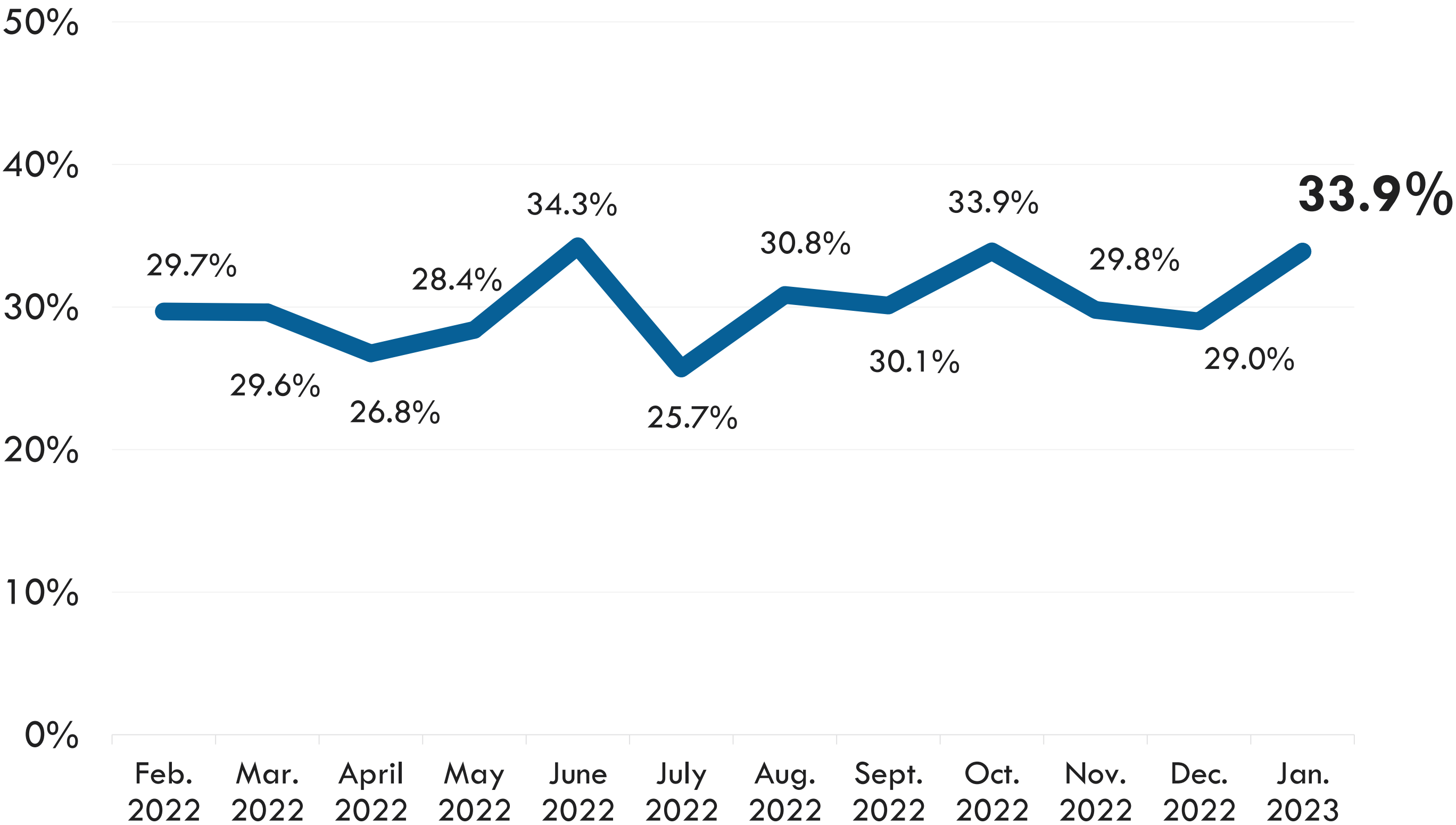


Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

Destination  Analysts

Expectations for travel outside the United States are up this month.

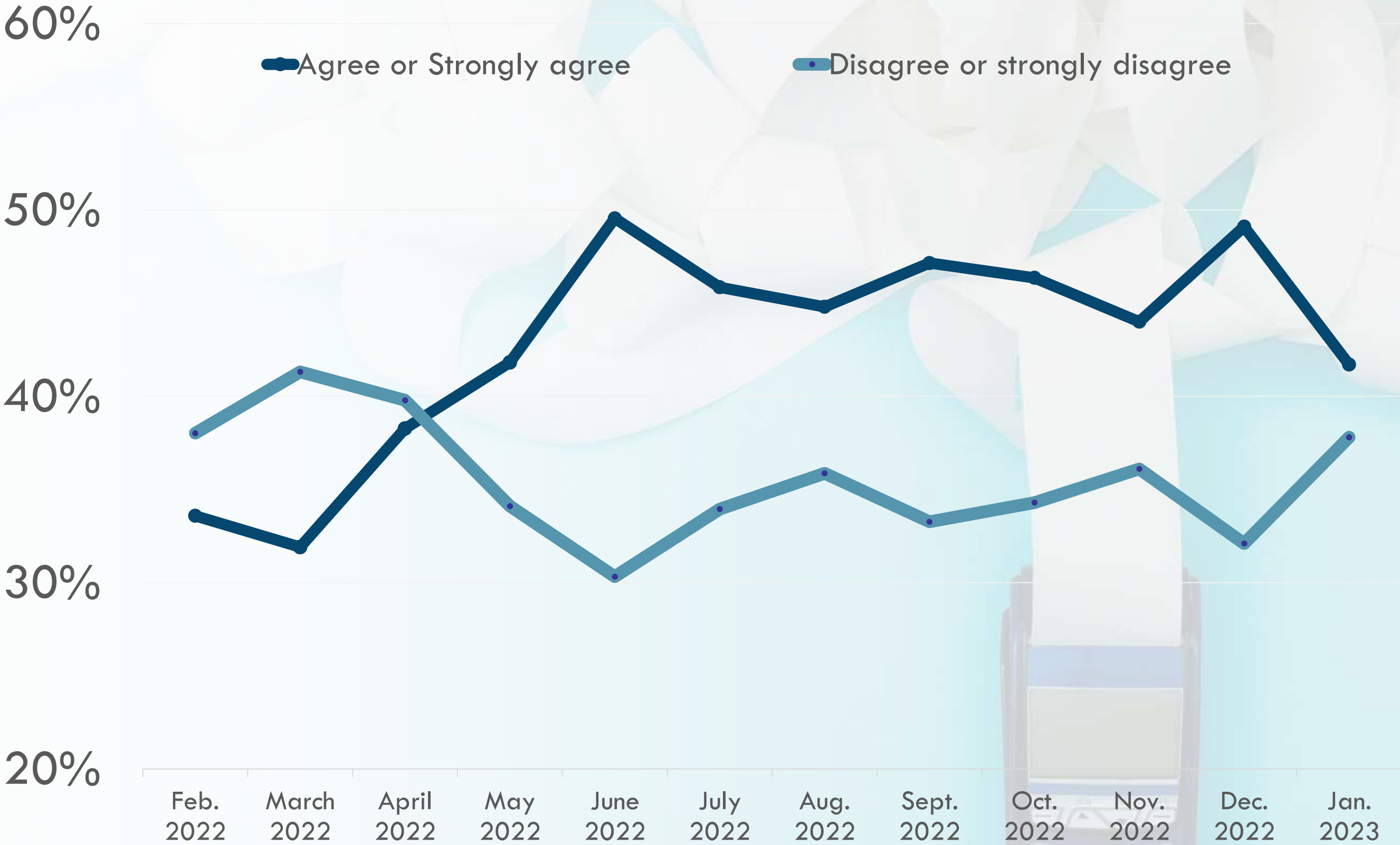
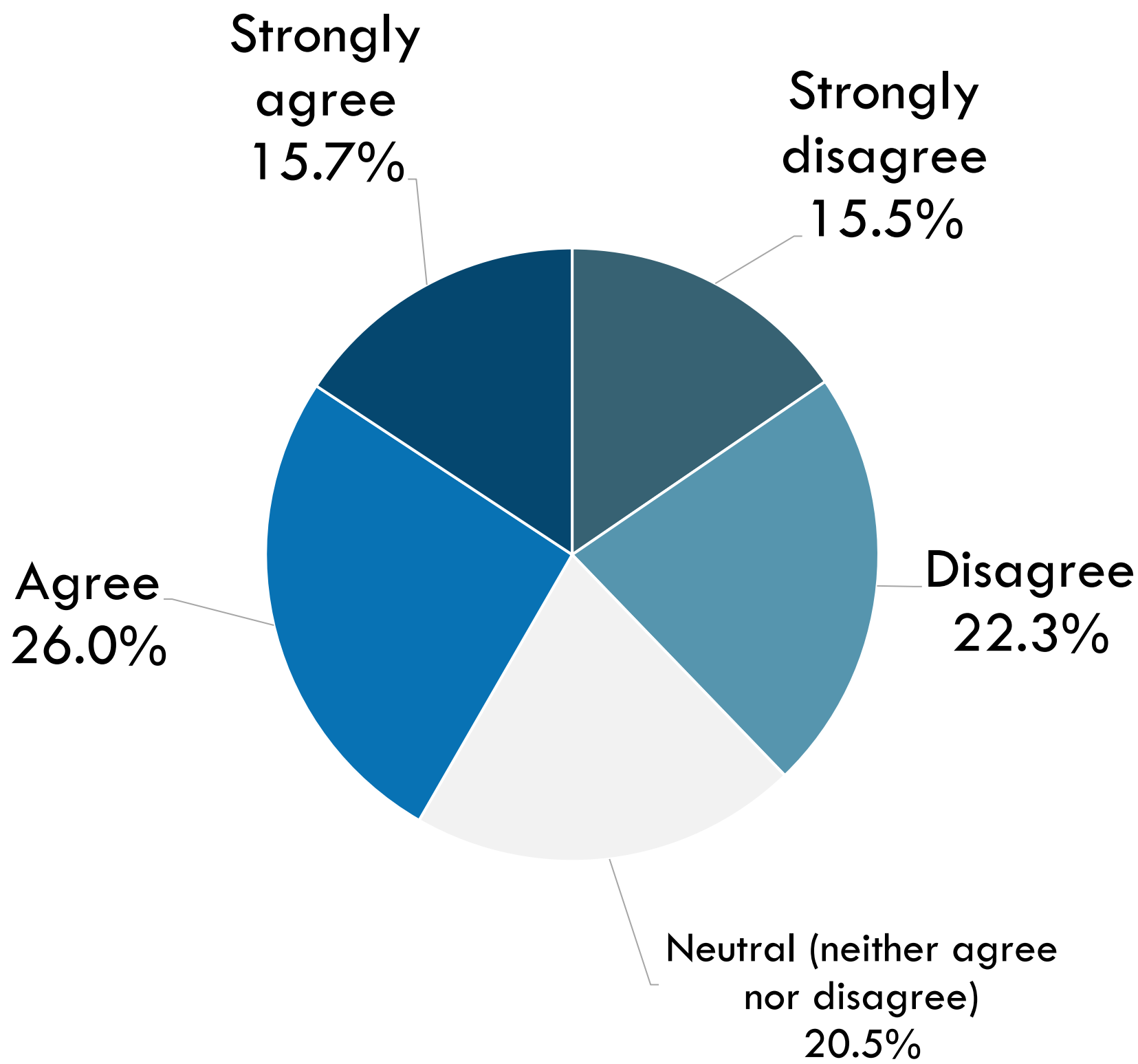
Likely or Very Likely to Travel Abroad



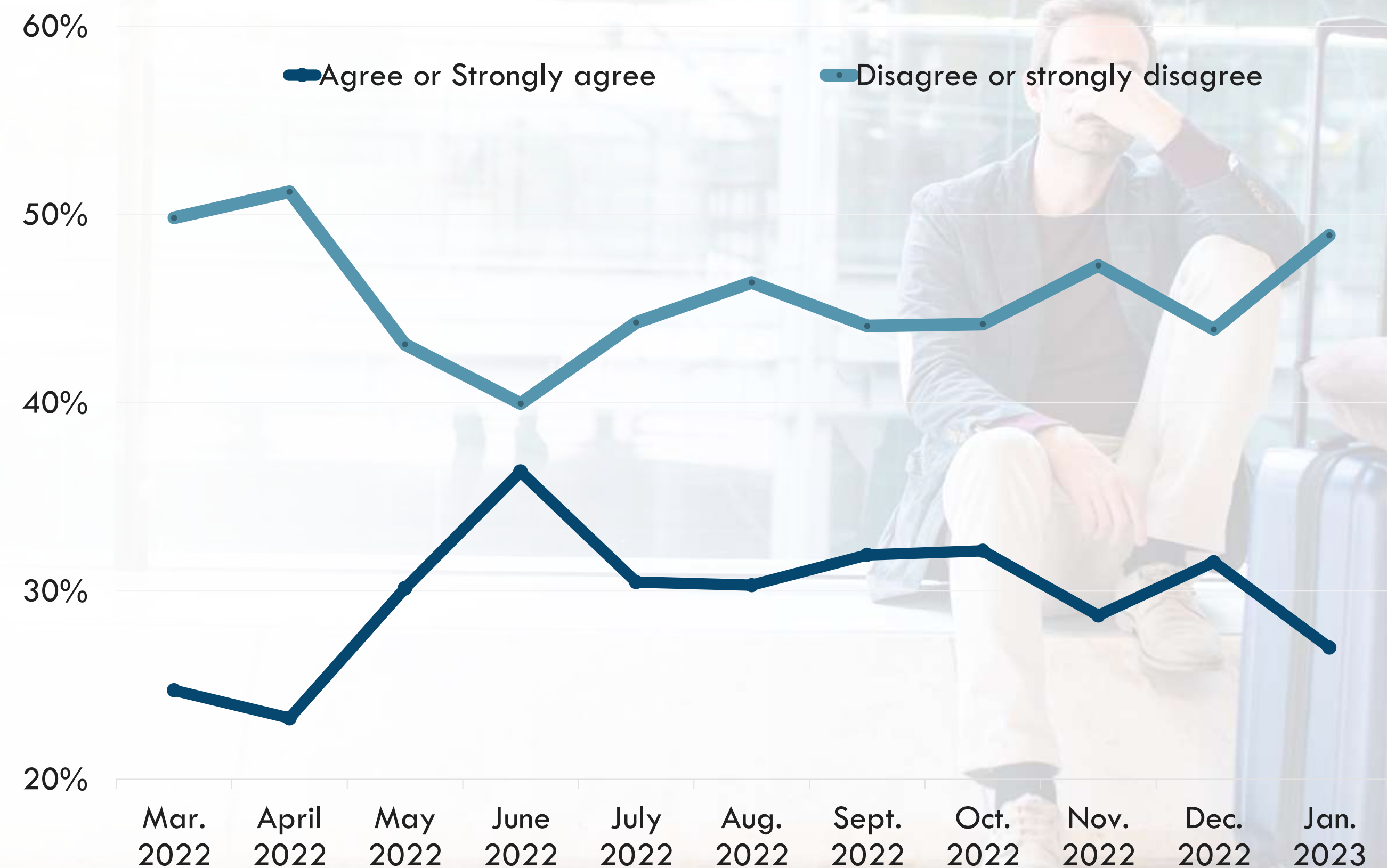
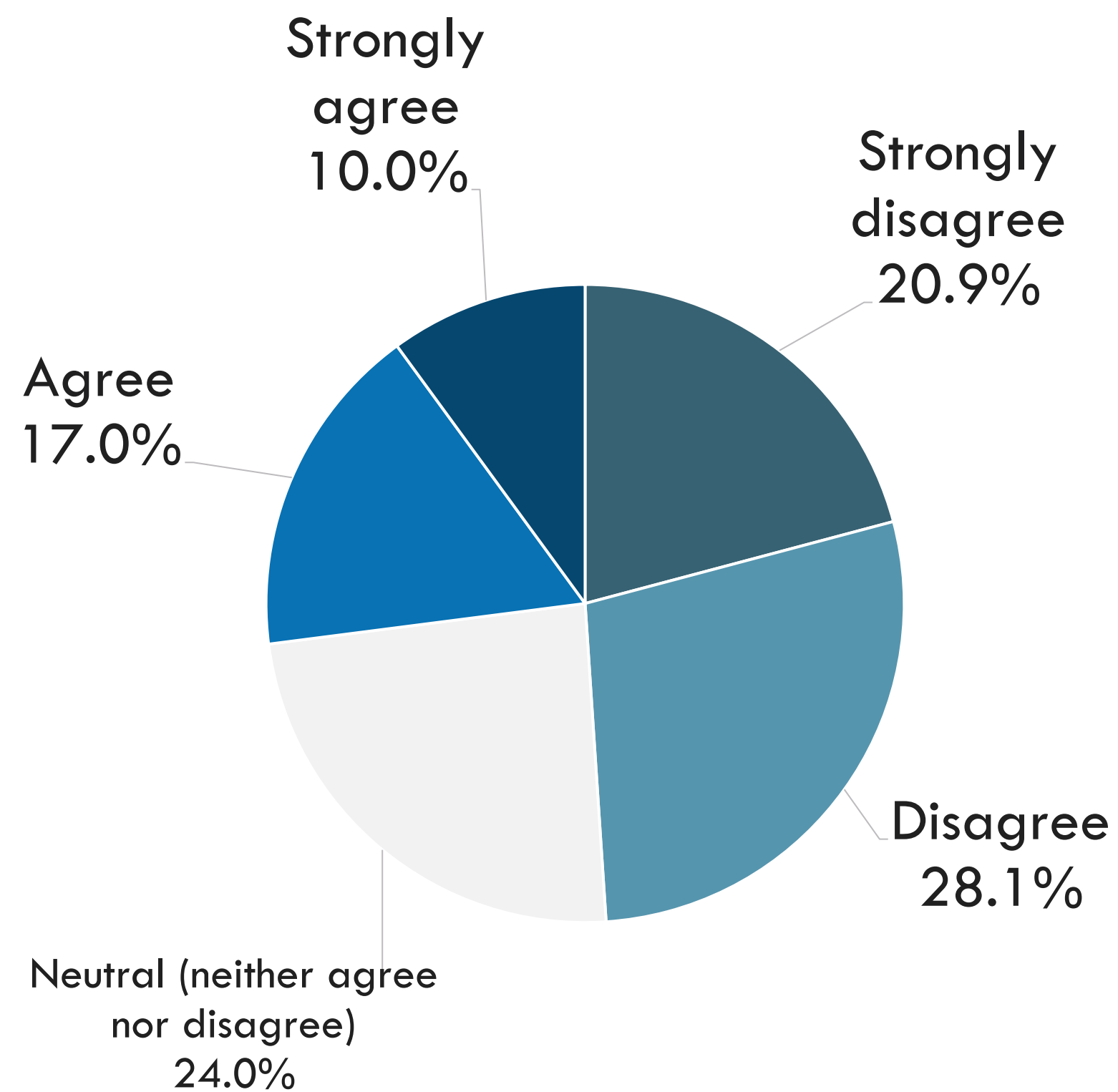
TRAVEL PRICES & INFLATION



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



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



A vintage yellow car is parked on a grassy field. On its roof, there is a stack of colorful suitcases (red, blue, orange) and a yellow bicycle. The background features a large tree on the left, a rocky mountain peak on the right, and a stream in the foreground. The scene is bathed in warm, golden light, suggesting a sunset or sunrise.

TRAVEL SENTIMENT INDICES

NEW!

TRAVEL SENTIMENT INDICES

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

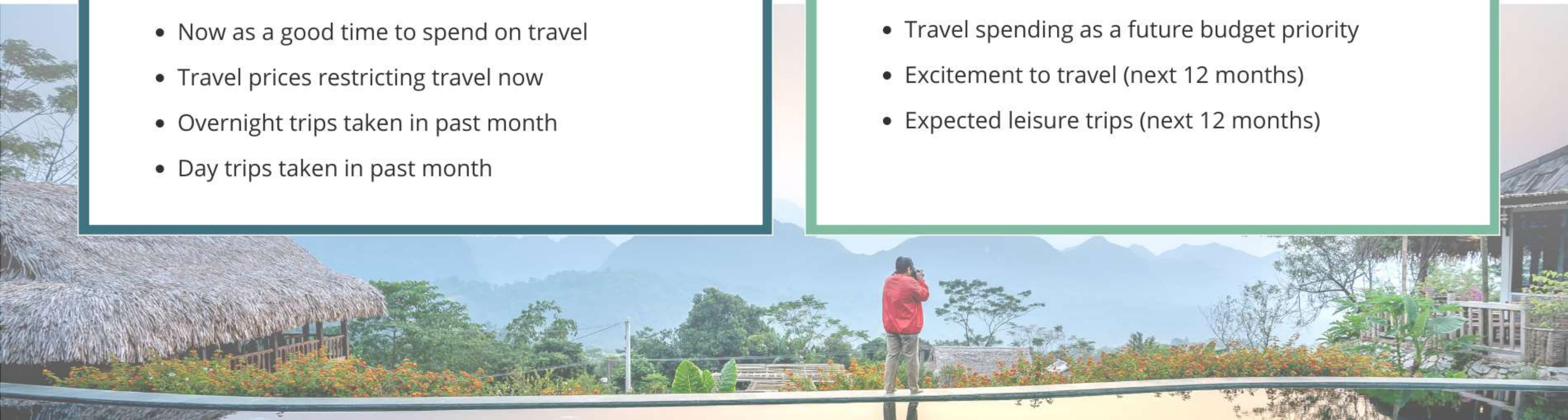
Index values are calculated by combining key questions.

Current Travel Sentiment Index:

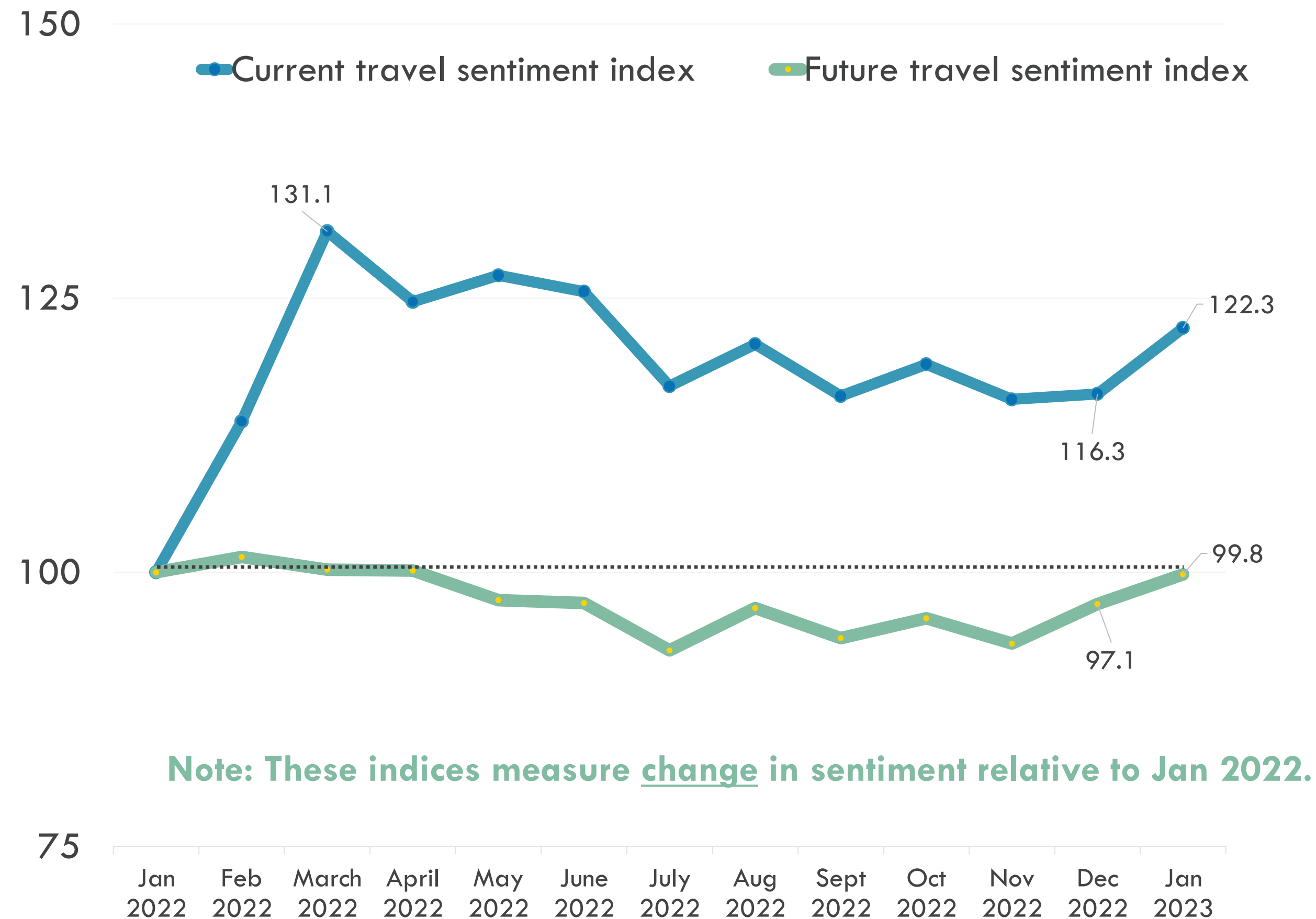
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

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:



- Current travel sentiment grew sharply early in 2022, but retracted as inflationary pressures grew. This month the index again grew sharply.
- Future travel sentiment had remained relatively stable throughout 2022, but has moved forward in the past two months.

TRAVEL MOTIVATIONS



Last Month

The Wisdom of Crowds – Predictions for 2023



Wildfire Problems in the West



Travel Becomes More Frustrating



COVID Becomes a Thing of the Past



Labor Shortages
in the Travel Industry



Demand for Authenticity Rises



National Parks
Overrun by Visitors



Travel Industry Price Gouging
More Common



Decline in Interest in
Cryptocurrency Investment



Bull Market in 2023



Dream Trips Happening!



Travelers Sour on
Home Rental Services



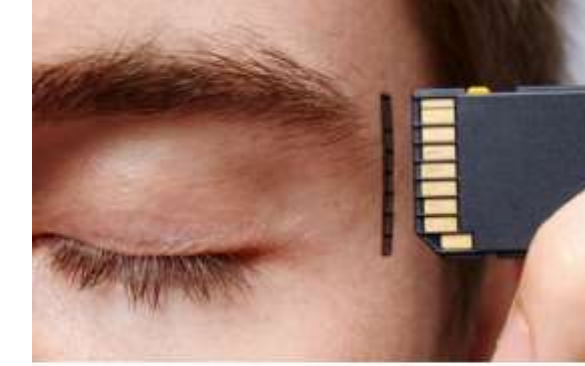
Metaverse Starts Replacing Travel

This Month

What Drives Us to Travel?



Escape Pressures of Daily Life



Create Memories



Quality Time With Loved Ones



Shopping



Romantic Opportunities



FOMO



Bragging Rights



Food/Cuisine



Partying!



Experiences in Nature



A Personal Hobby



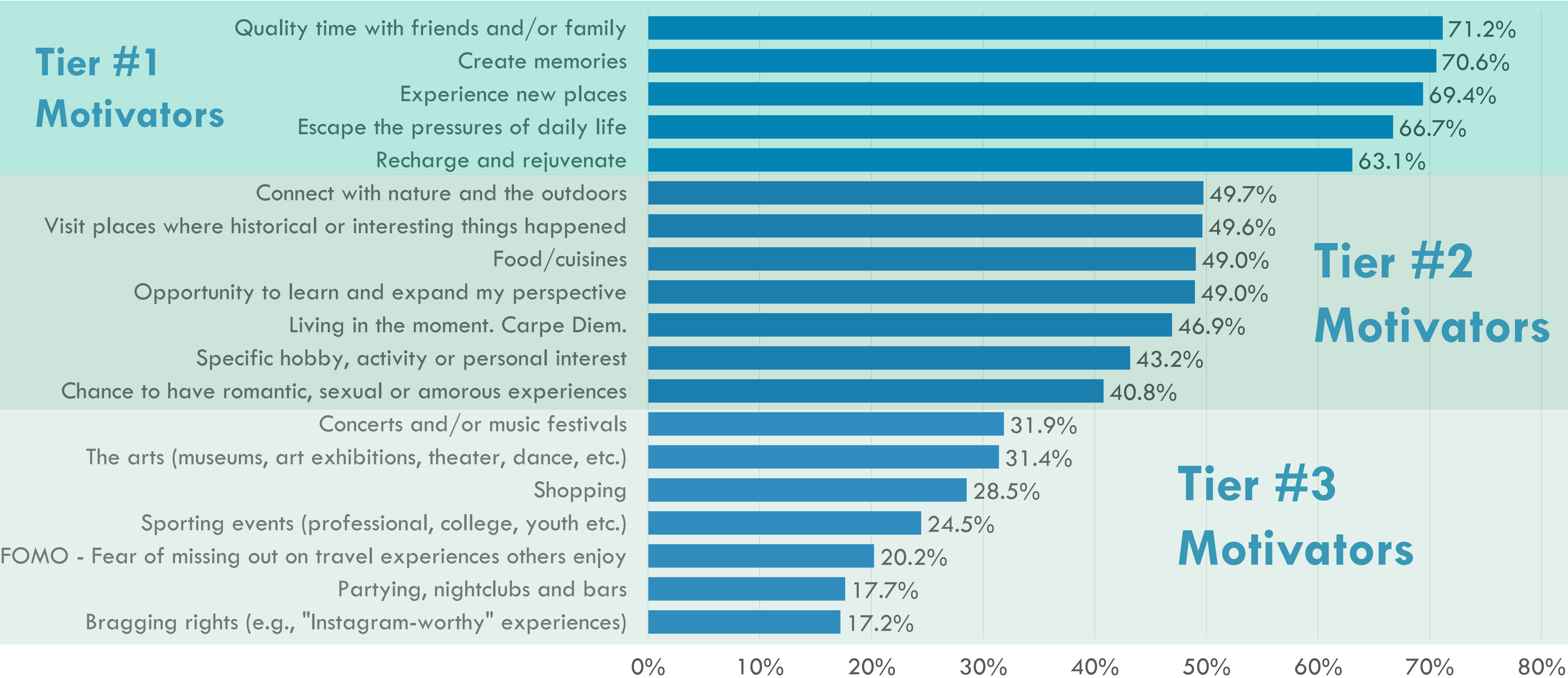
The Arts

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now?

- ☐ **Critically important - It's my rocket fuel!**
- ☐ **Very motivating**
- ☐ **Somewhat motivating**
- ☐ **Slightly motivating**
- ☐ **Not motivating at all**



Question: Please think deeply about what motivates you to travel.
What really fuels your desire to travel now?





Everybody's got a
hungry heart.

Bruce Springsteen

“ quote fancy

GENERATIONAL DEFINITIONS



GEN Z

1997 to 2012



GEN X

1965 to 1980



MILLENNIALS

1981 to 1996

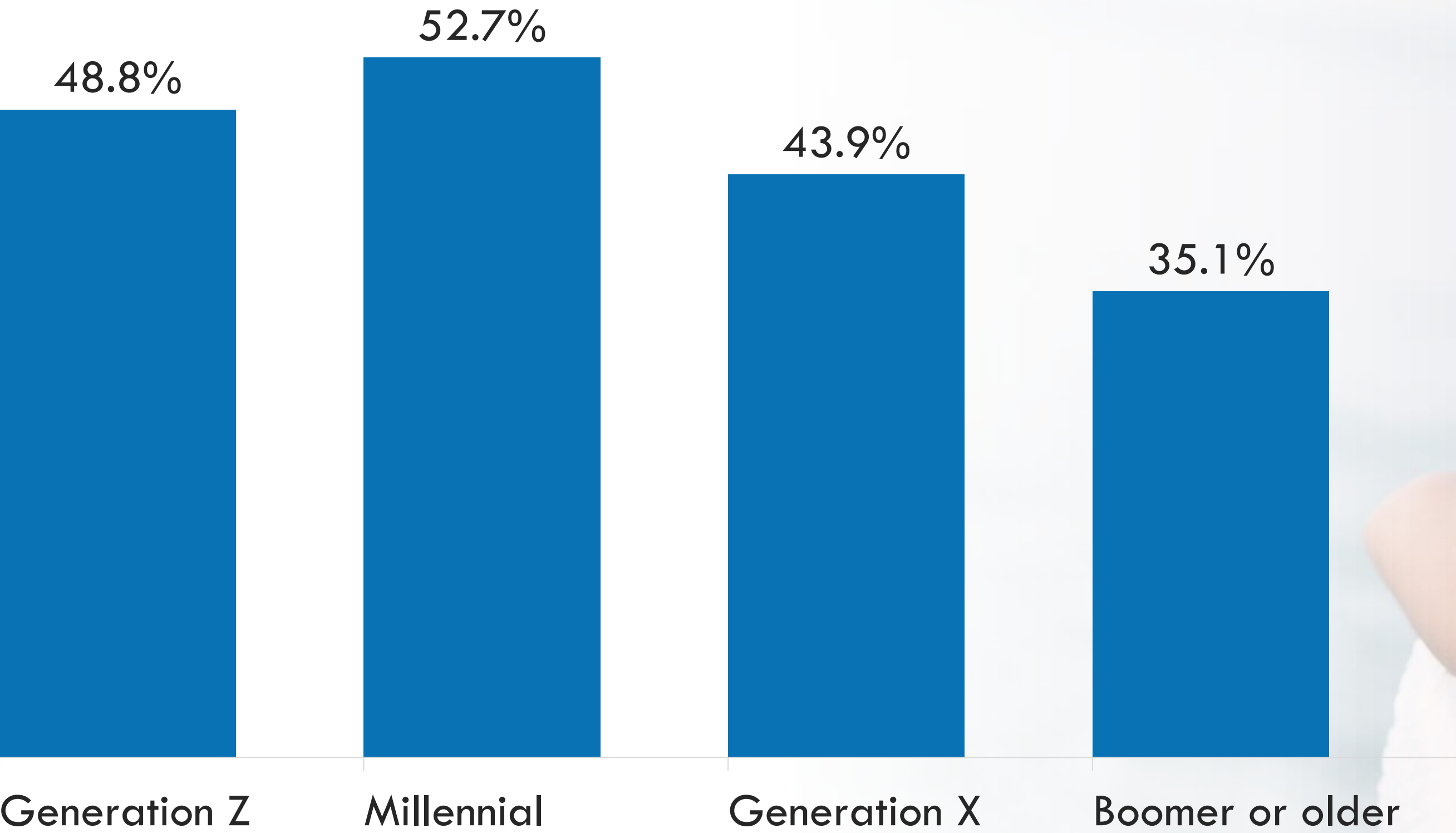


BABY BOOMERS

1946 to 1964

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

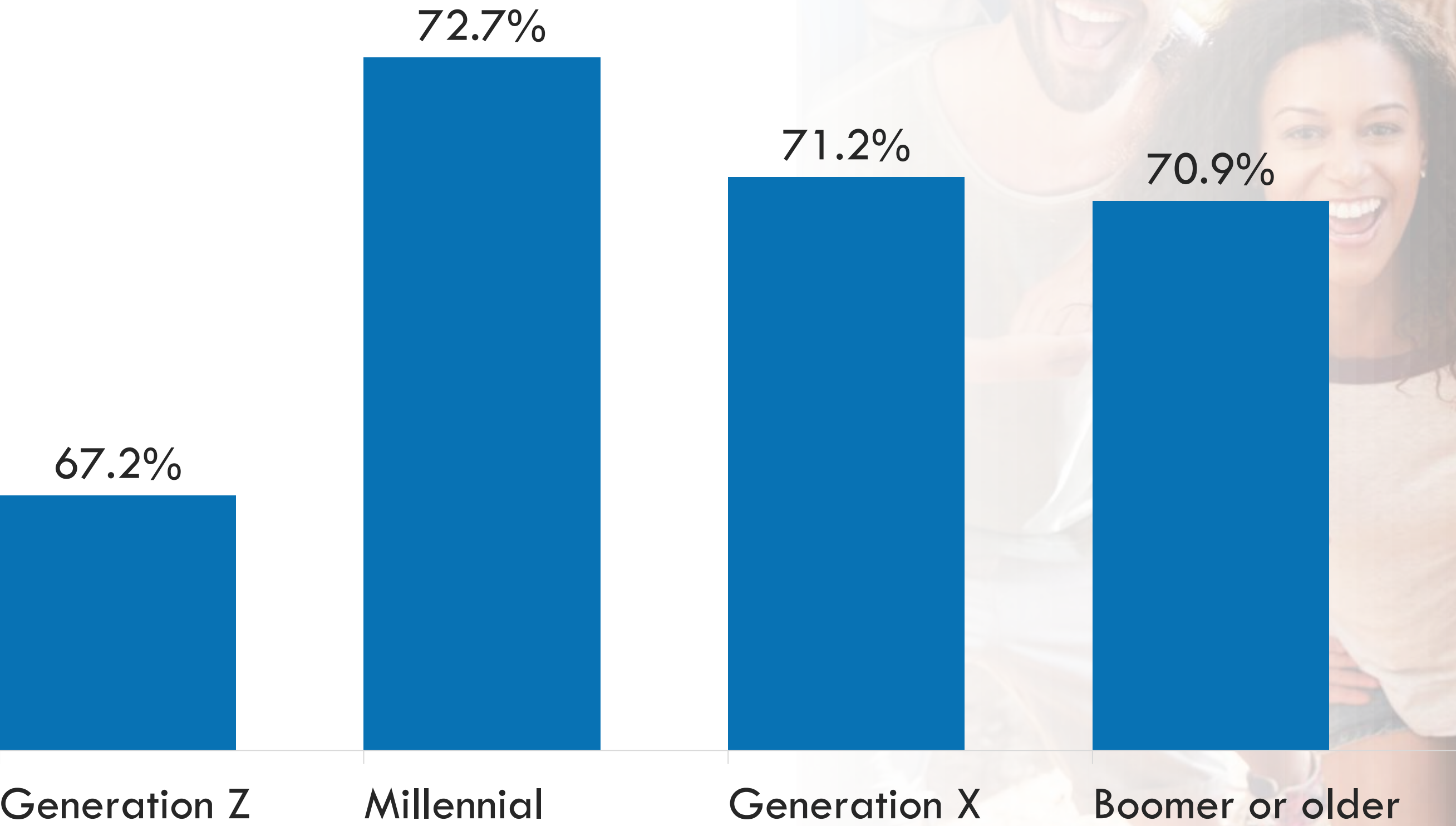
Average for All Motivators



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

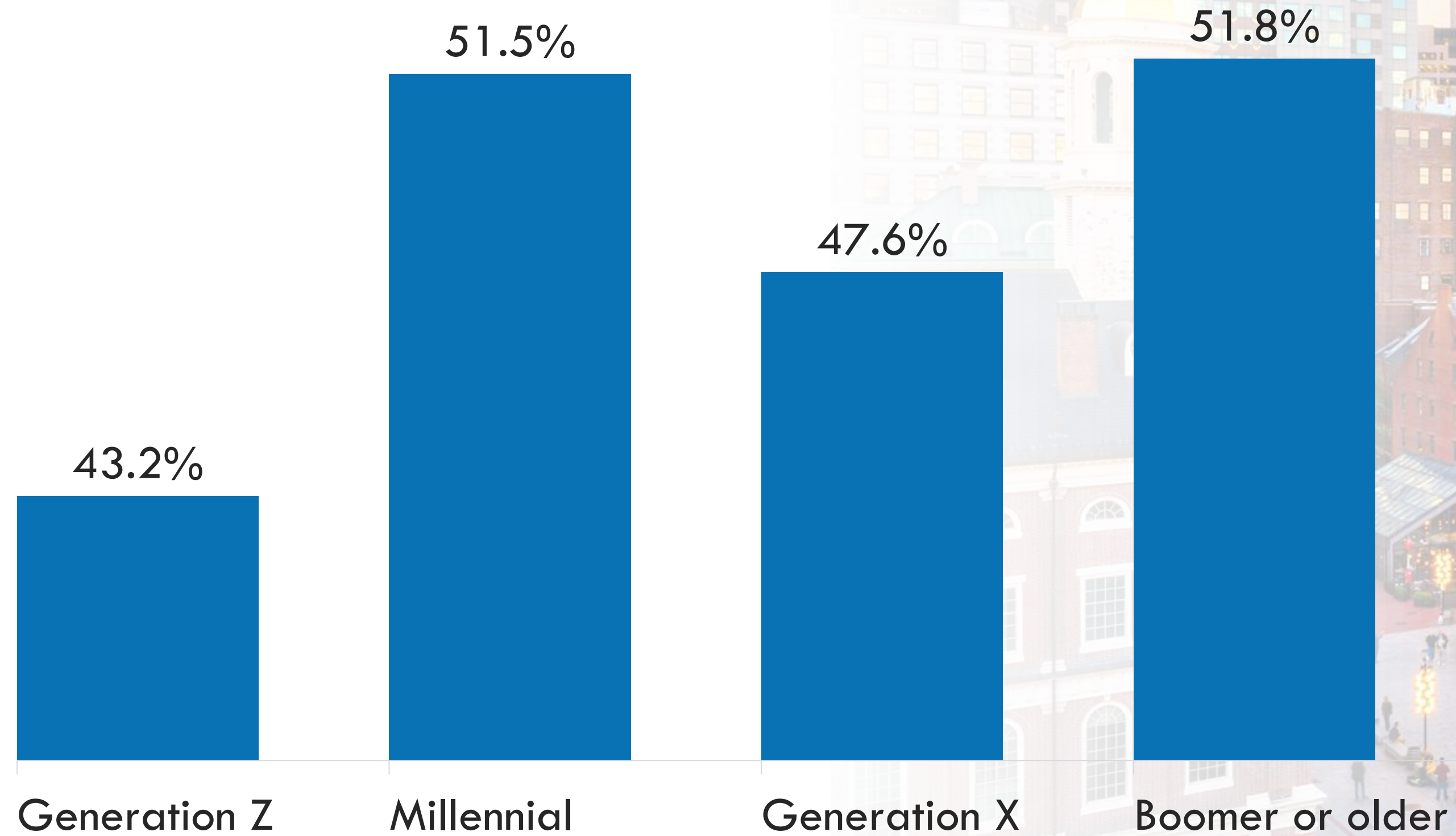
Quality Time with Friends and/or Family



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

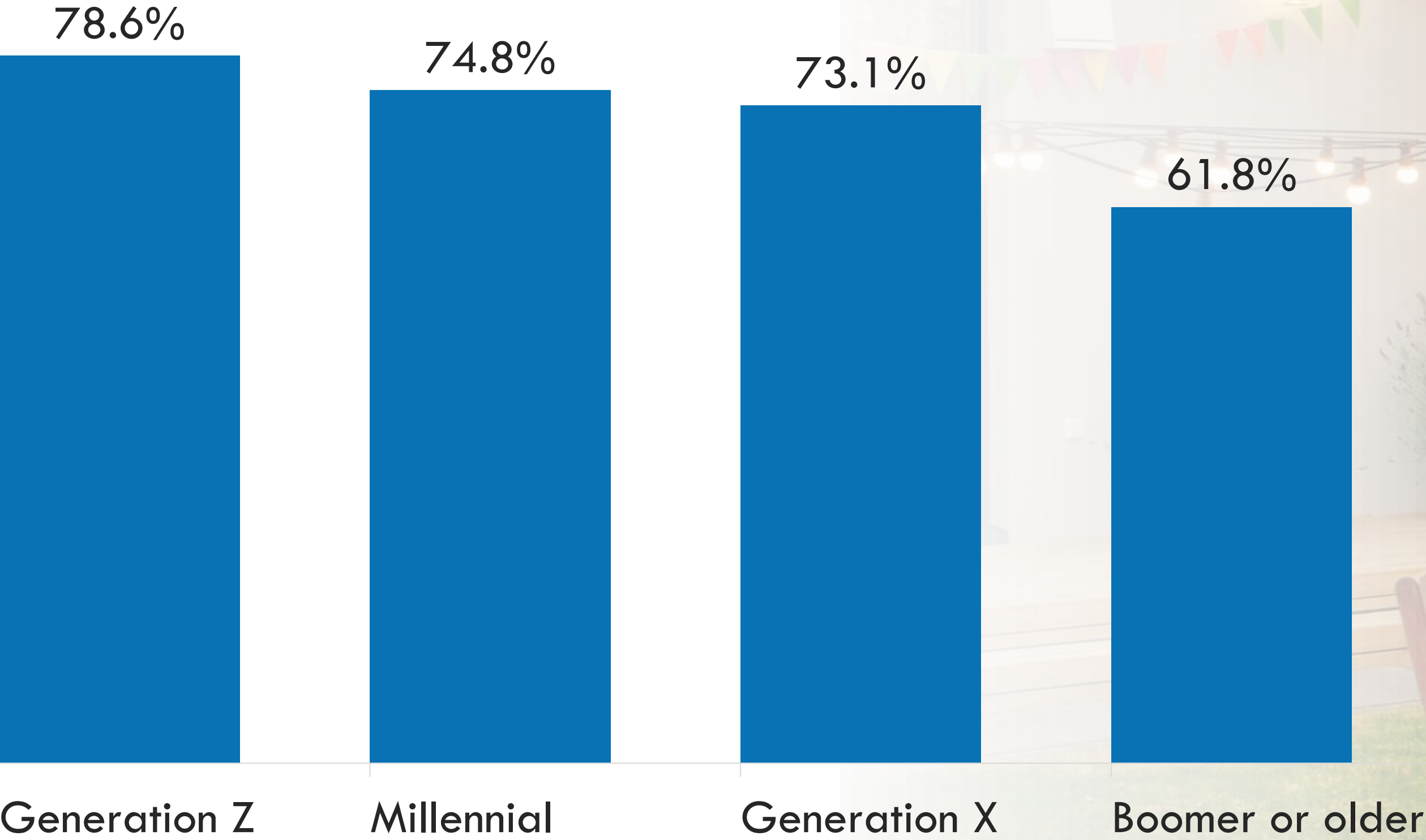
Visit Places Where Historical or Interesting Things Happened



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

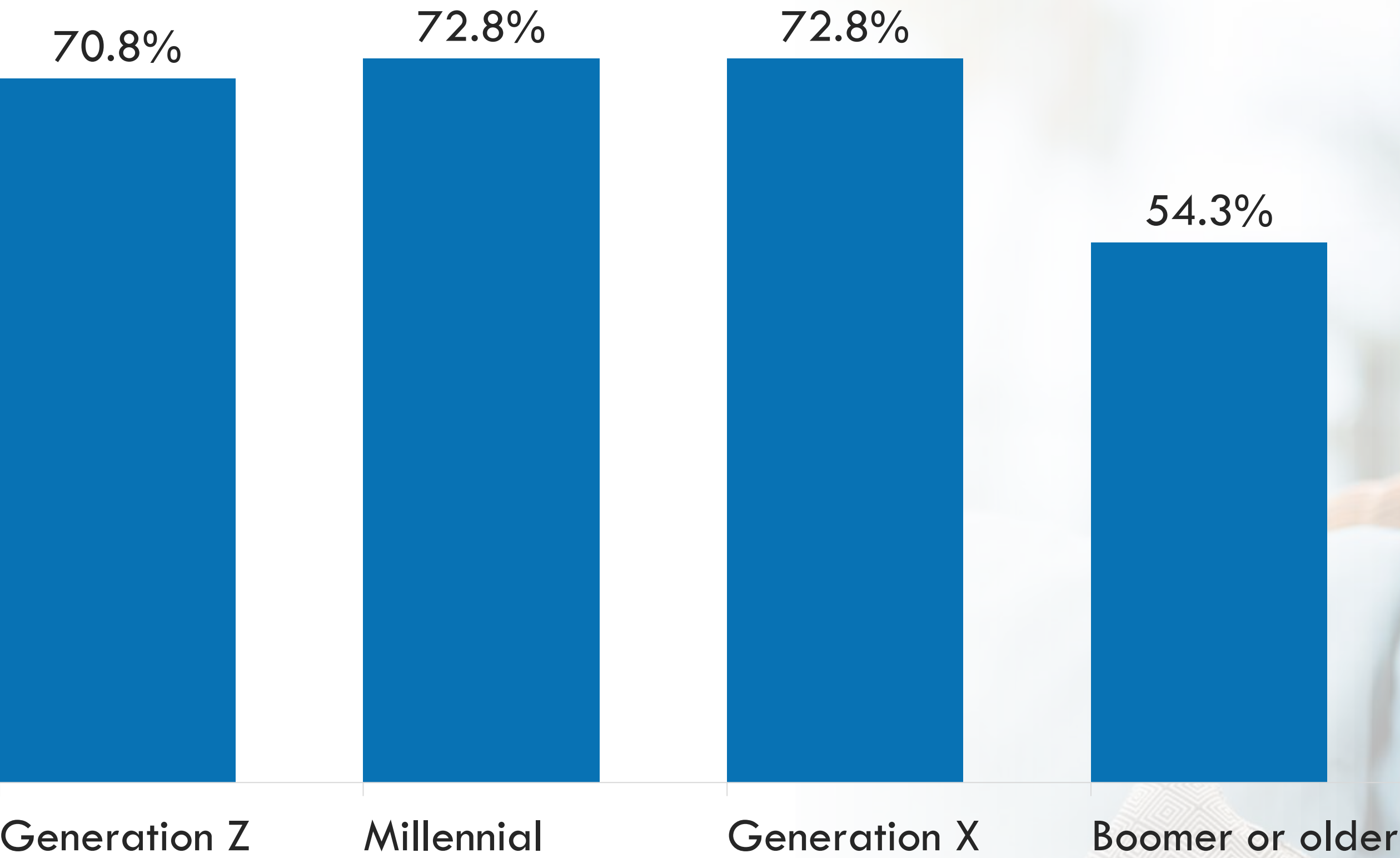
Creating Memories



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

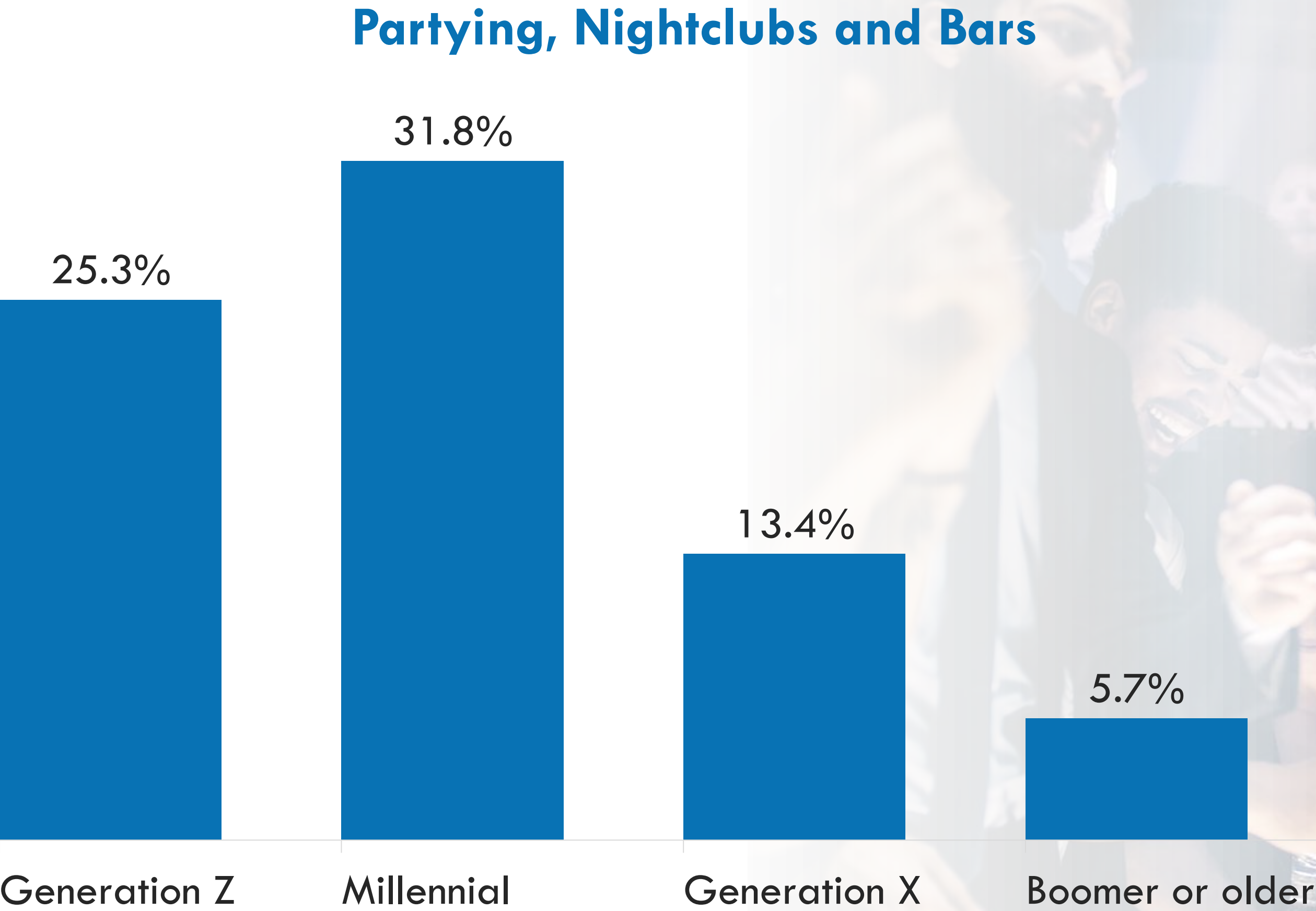
Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

Escape the Pressures of Daily Life



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

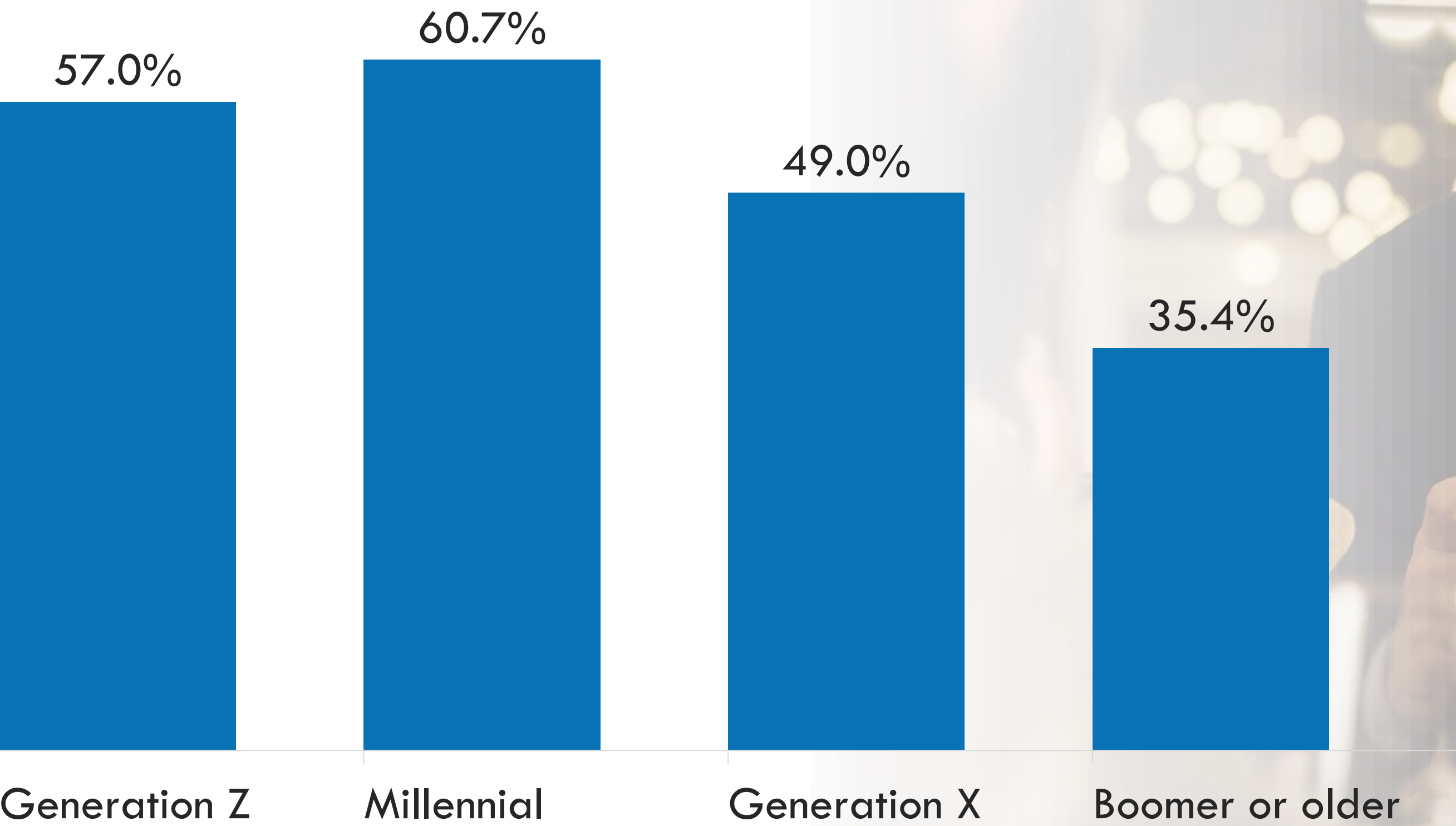
Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

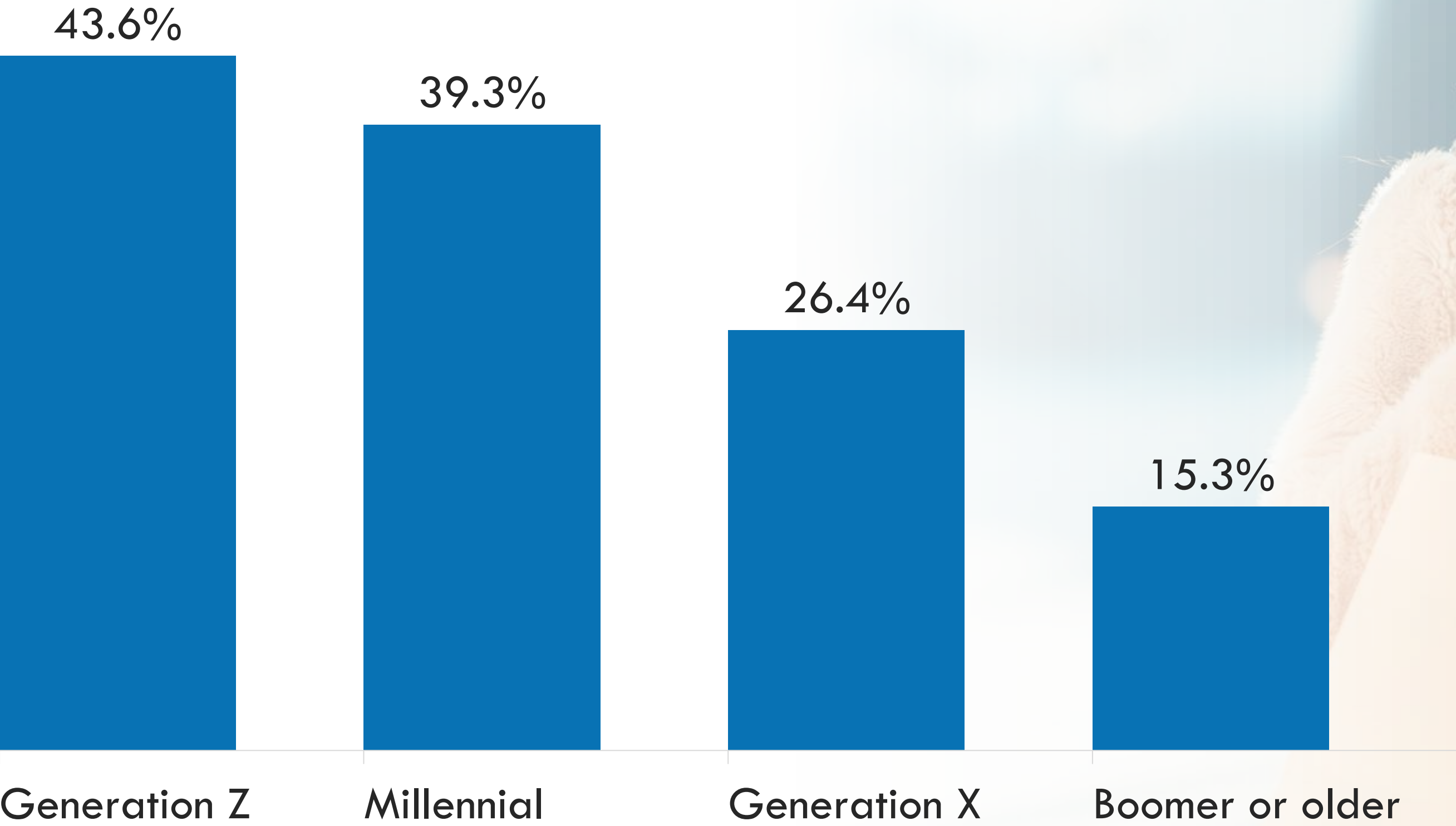
Food/Cuisine



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

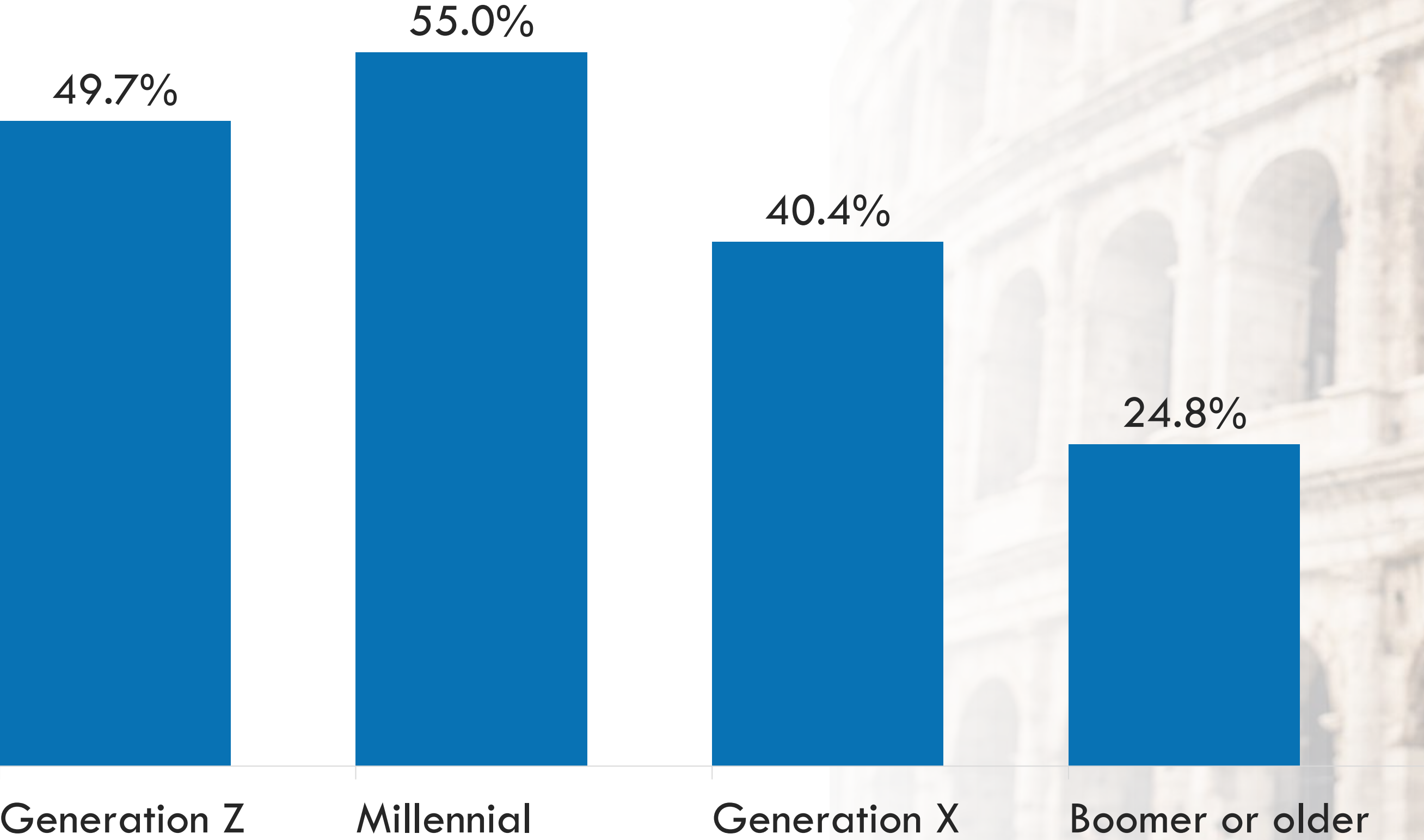
Shopping



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

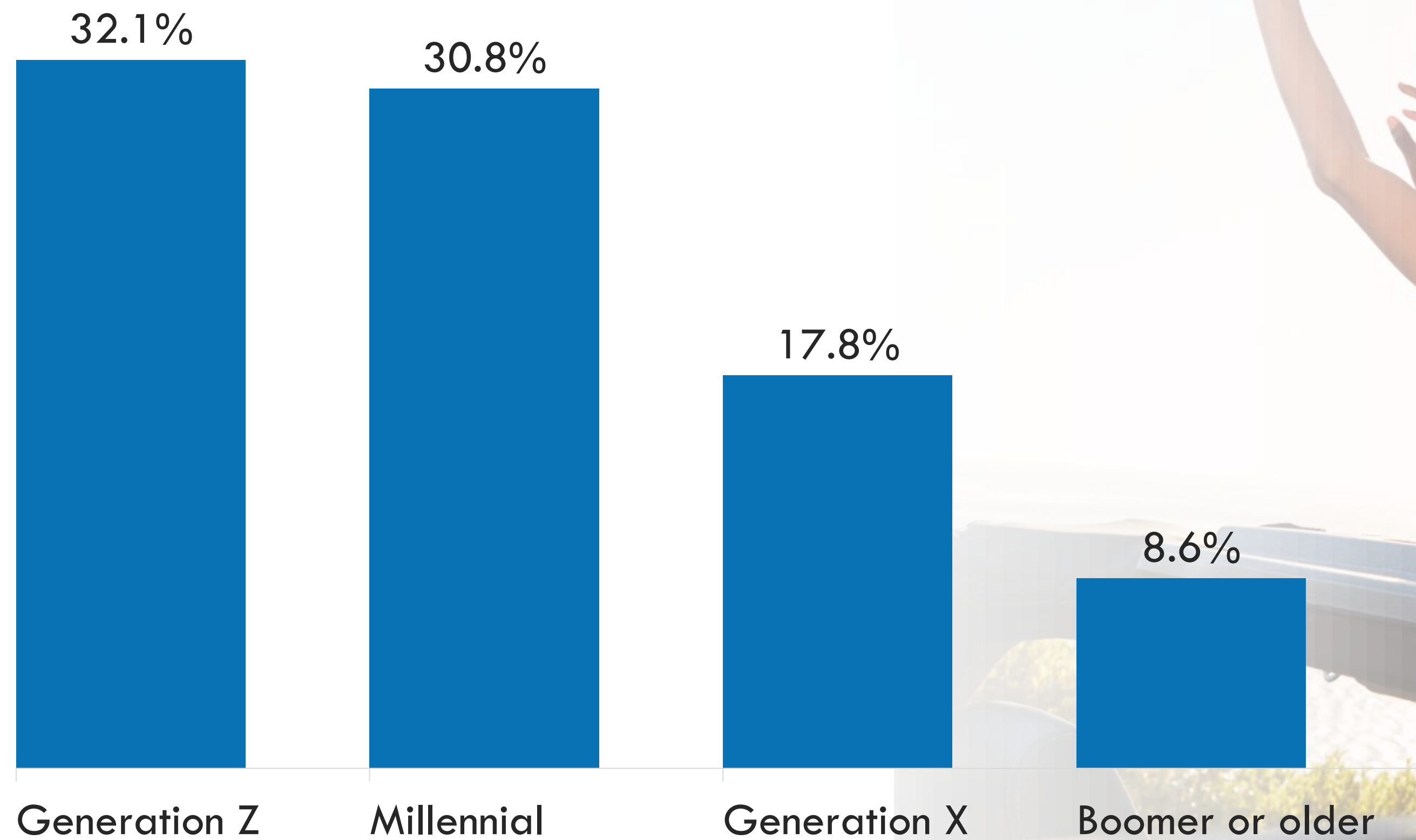
Chance to Have Romantic, Sexual or Amorous Experiences



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

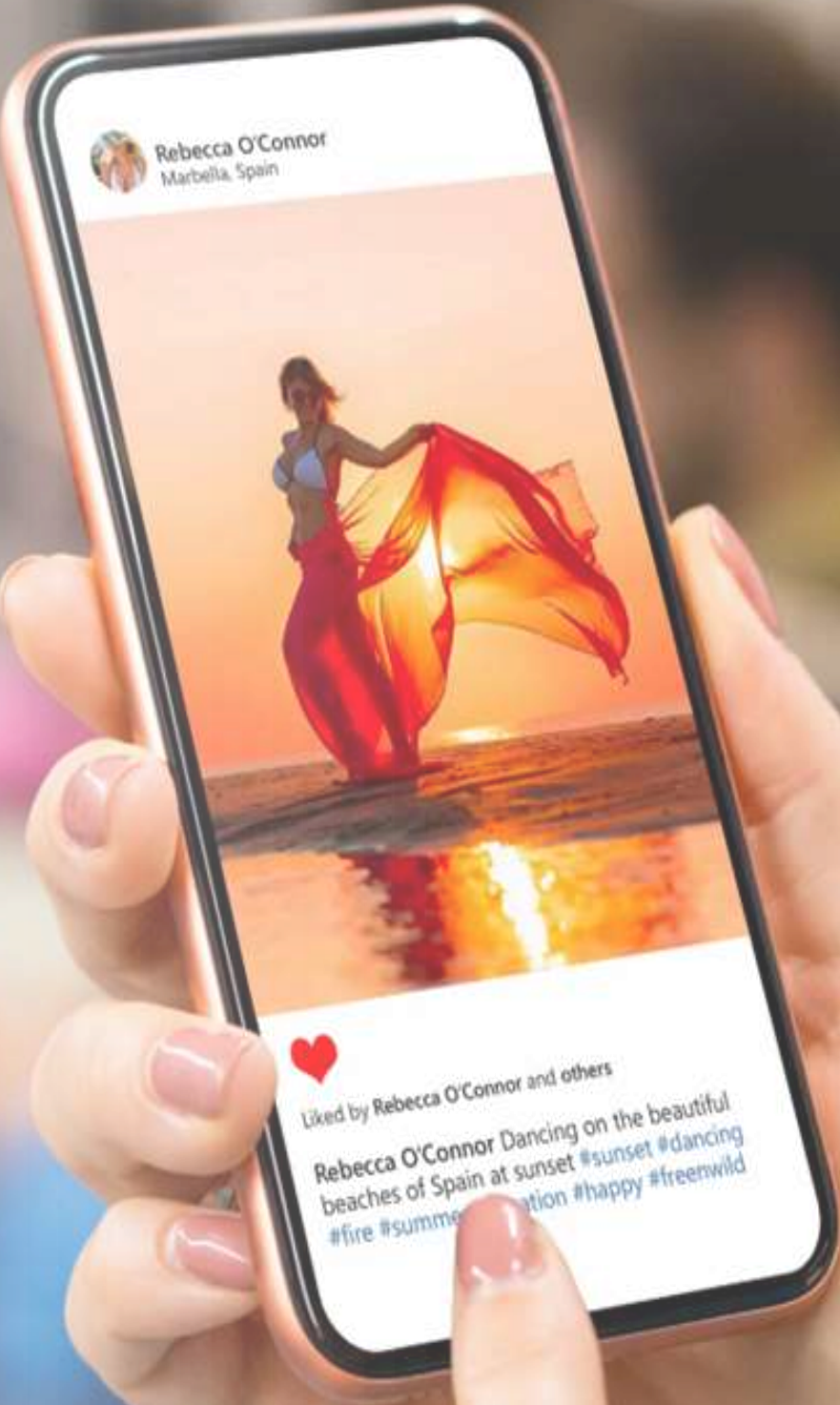
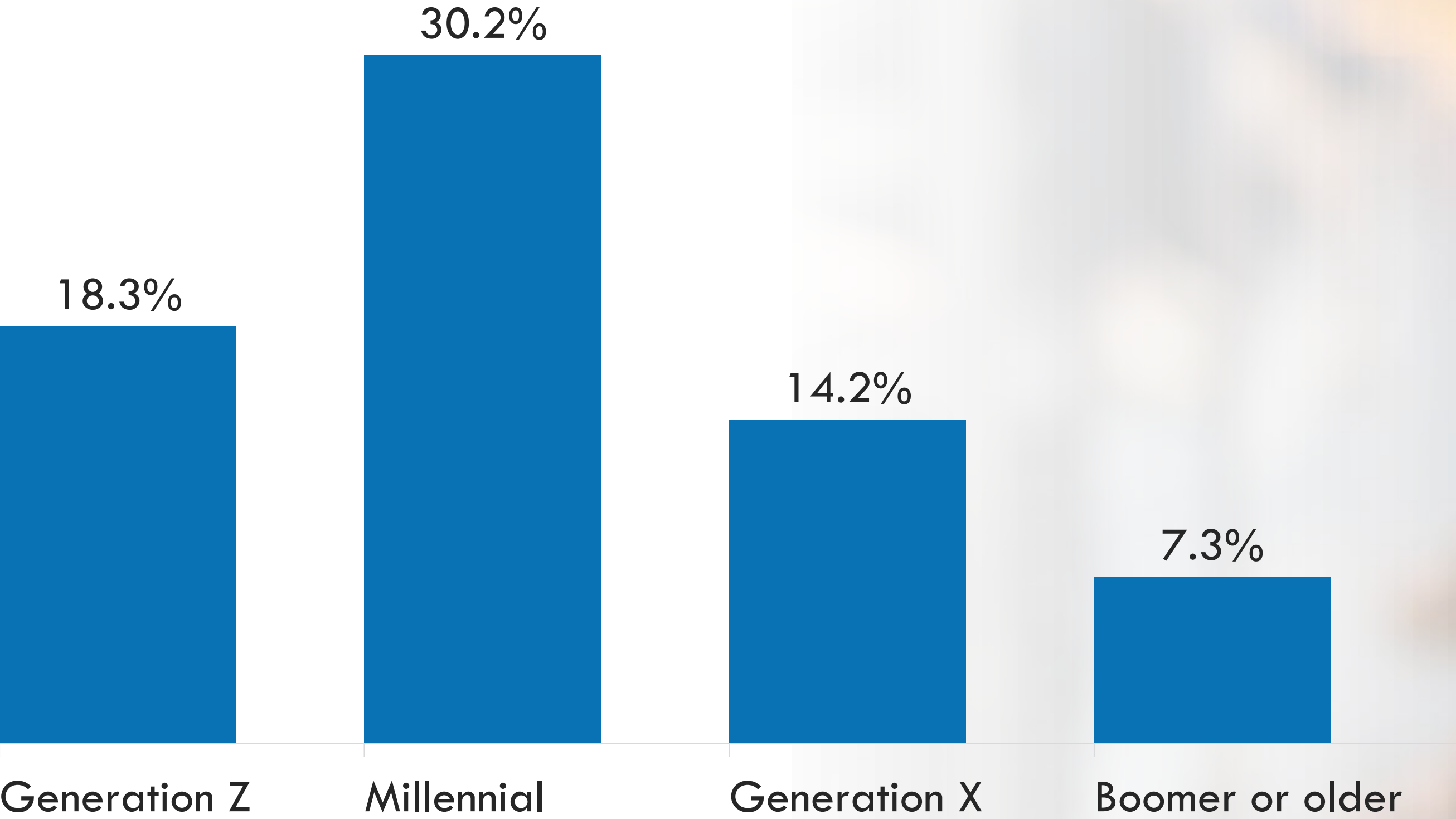
FOMO - Fear of Missing Out on Travel Experiences Others Enjoy



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Please think deeply about what motivates you to travel. What really fuels your desire to travel now? (Top 2 Box Score)

Bragging Rights (e.g., "Instagram-Worthy" Experiences)



(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

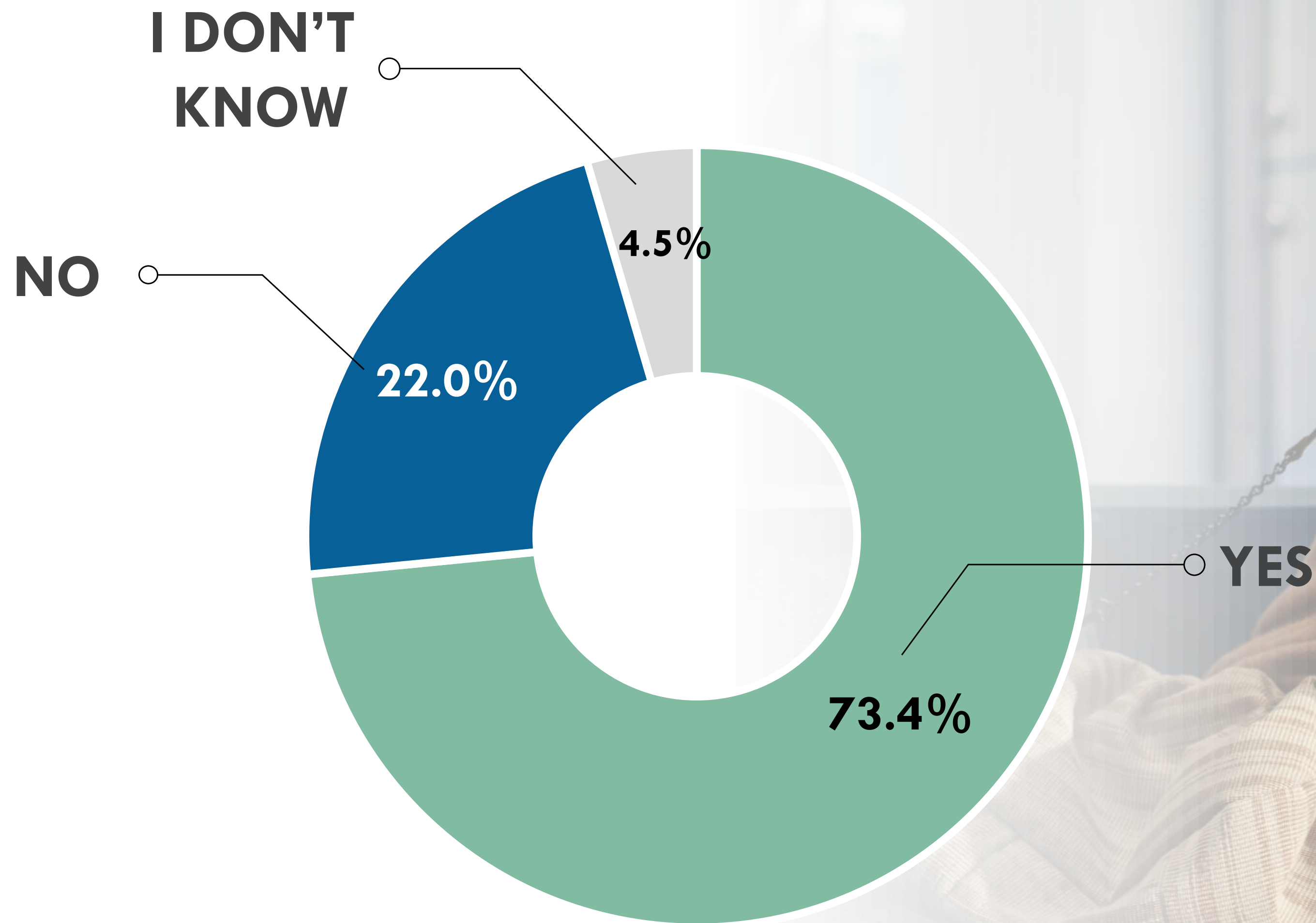


**YOU ASKED
FOR IT!**

Question: In the past two (2) month, the U.S. air traffic system has experienced significant disruptions causing travel delays. These issues impacting passengers have included:

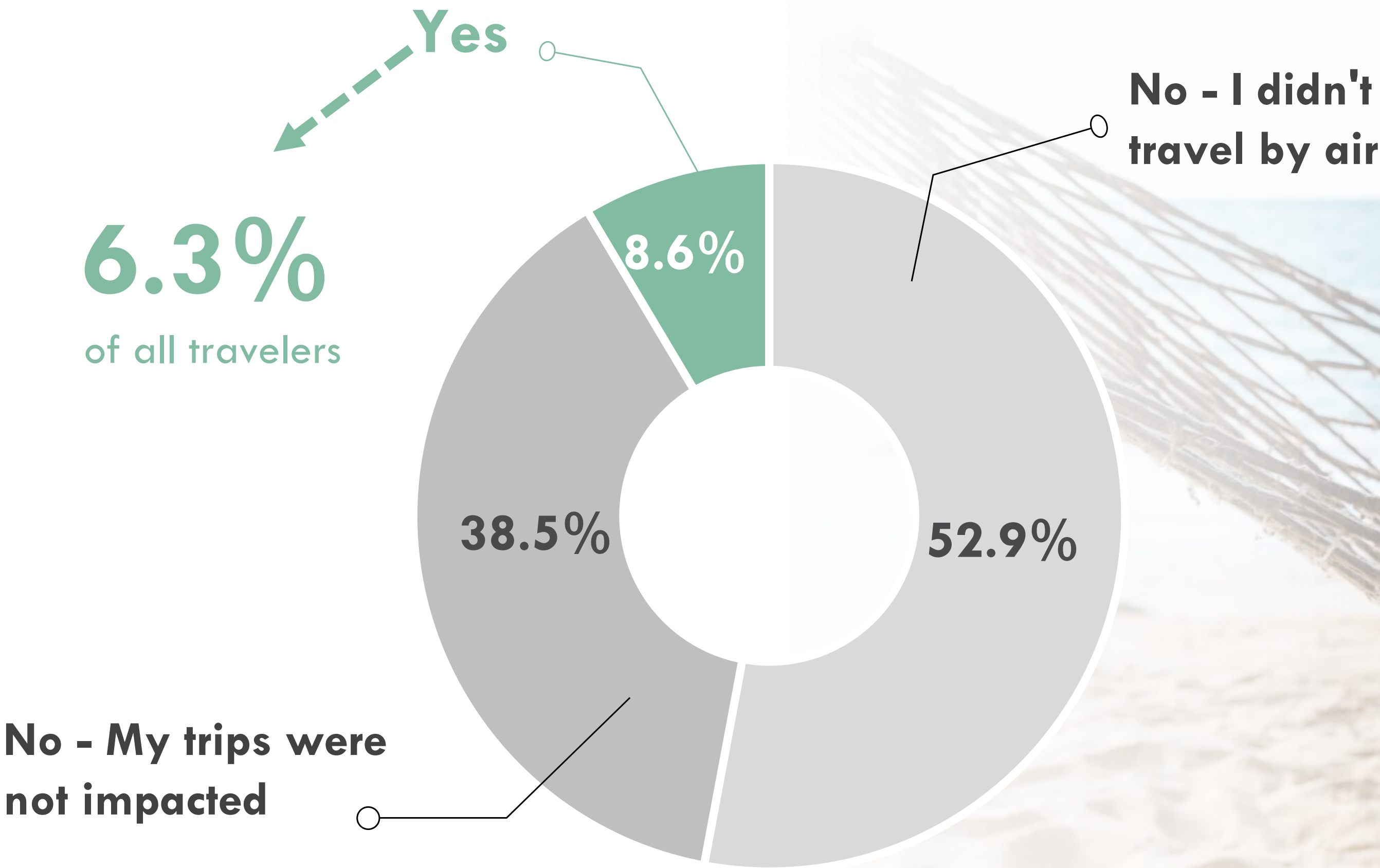
- **A massive winter storm causing cancellations**
- **A Southwest Airlines systems collapse**
- **A Federal Aviation Administration (FAA) computer outage**

Question: Before taking this survey today, were you aware of these recent issues in air transportation.



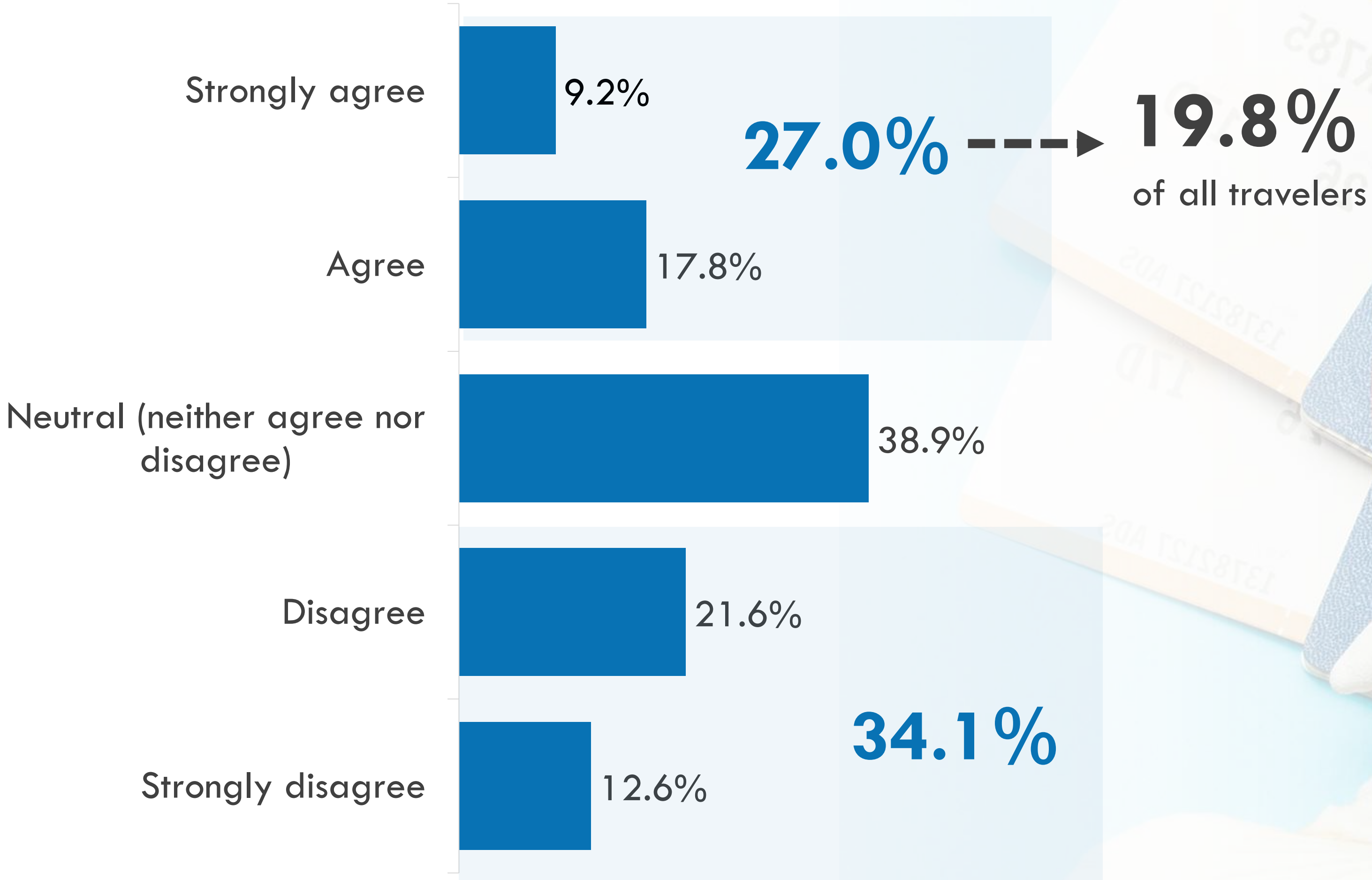
(Base: All respondents, 4,025 completed surveys. Data collected January 15-22, 2023.)

Question: Were any of your trips impacted directly by these specific disruptions?



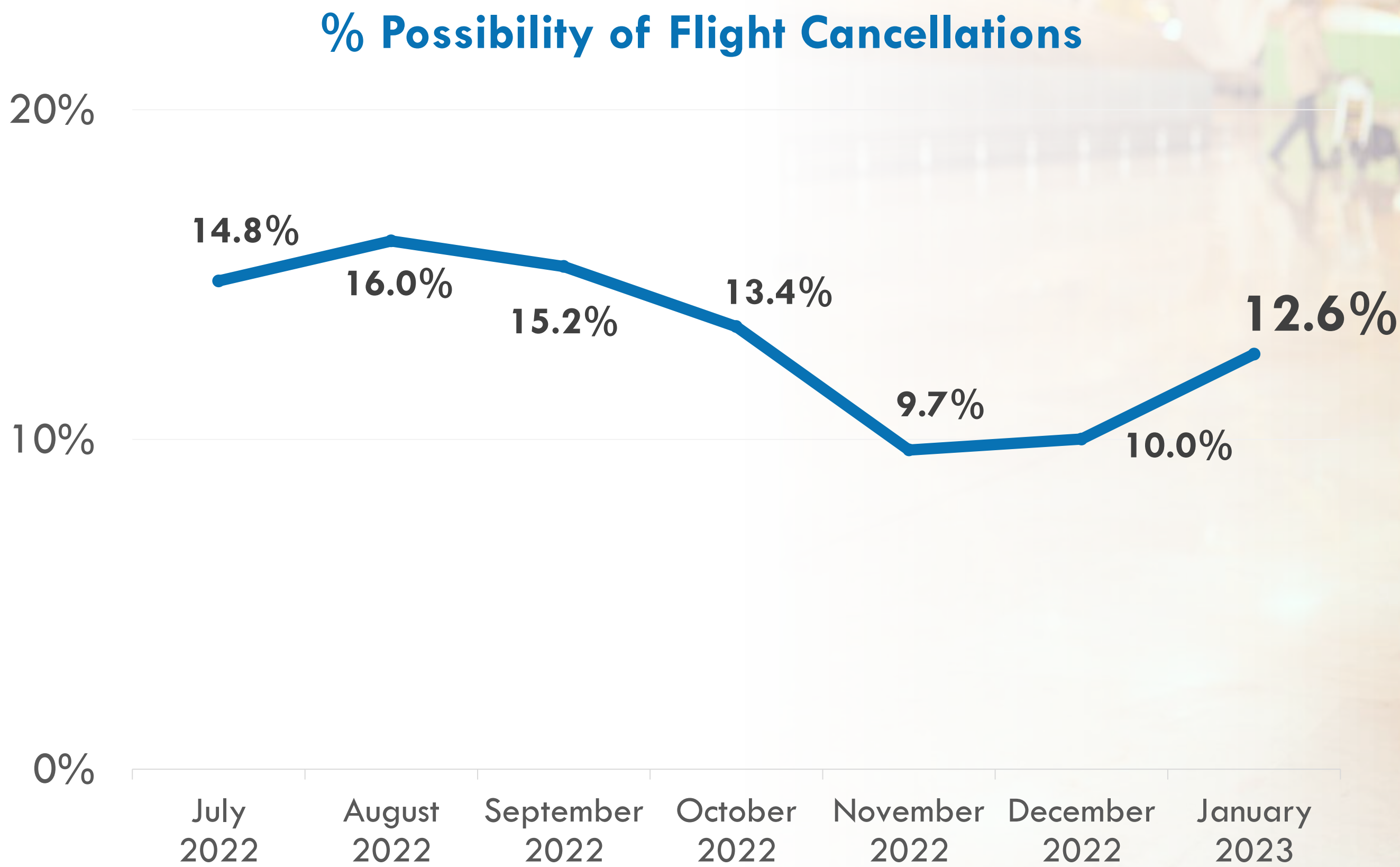
(Base: Respondents aware of the air travel situation. 3,009 completed surveys. Data collected January 15-22, 2023.)

Statement: “These recent issues in air transportation **MAKE ME LESS LIKELY TO TRAVEL** in the next six (6) months?”



(Base: Respondents aware of the air travel situation. 3,009 completed surveys. Data collected January 15-22, 2023.)

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



(Base: Respondents aware of the air travel situation. 3,009 completed surveys. Data collected January 15-22, 2023.)

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



THE STATE OF THE INTERNATIONAL TRAVELER STUDY

Destination Analysts' annual study,
The State of the International Traveler, offers
an in depth look at international travelers in
15 of the top global feeder markets.

Available for Purchase!



THE CVB & THE FUTURE OF THE MEETINGS INDUSTRY

*Marketing Strategy Edition,
Winter 2022/2023*

Destination  Analysts

Available for Purchase Today!

