

Destination  Analysts

THE STATE OF THE AMERICAN TRAVELER

AUGUST 2023 LIVESTREAM UPDATE



Destination Analysts

Deep | Actionable | Defensible | Timely



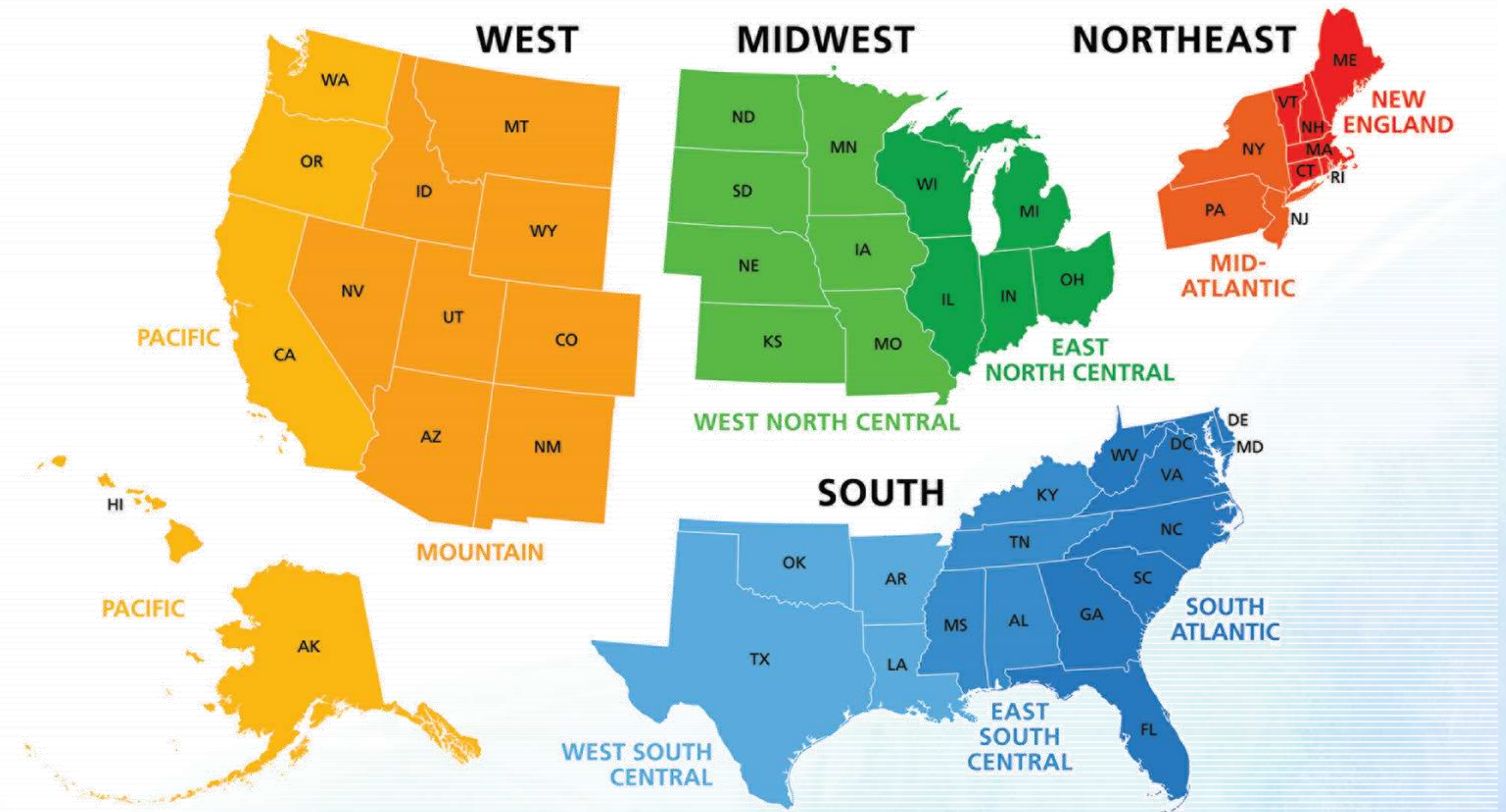
RECORDING + DECK:

DestinationAnalysts.com

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: **July 17-21**
- 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

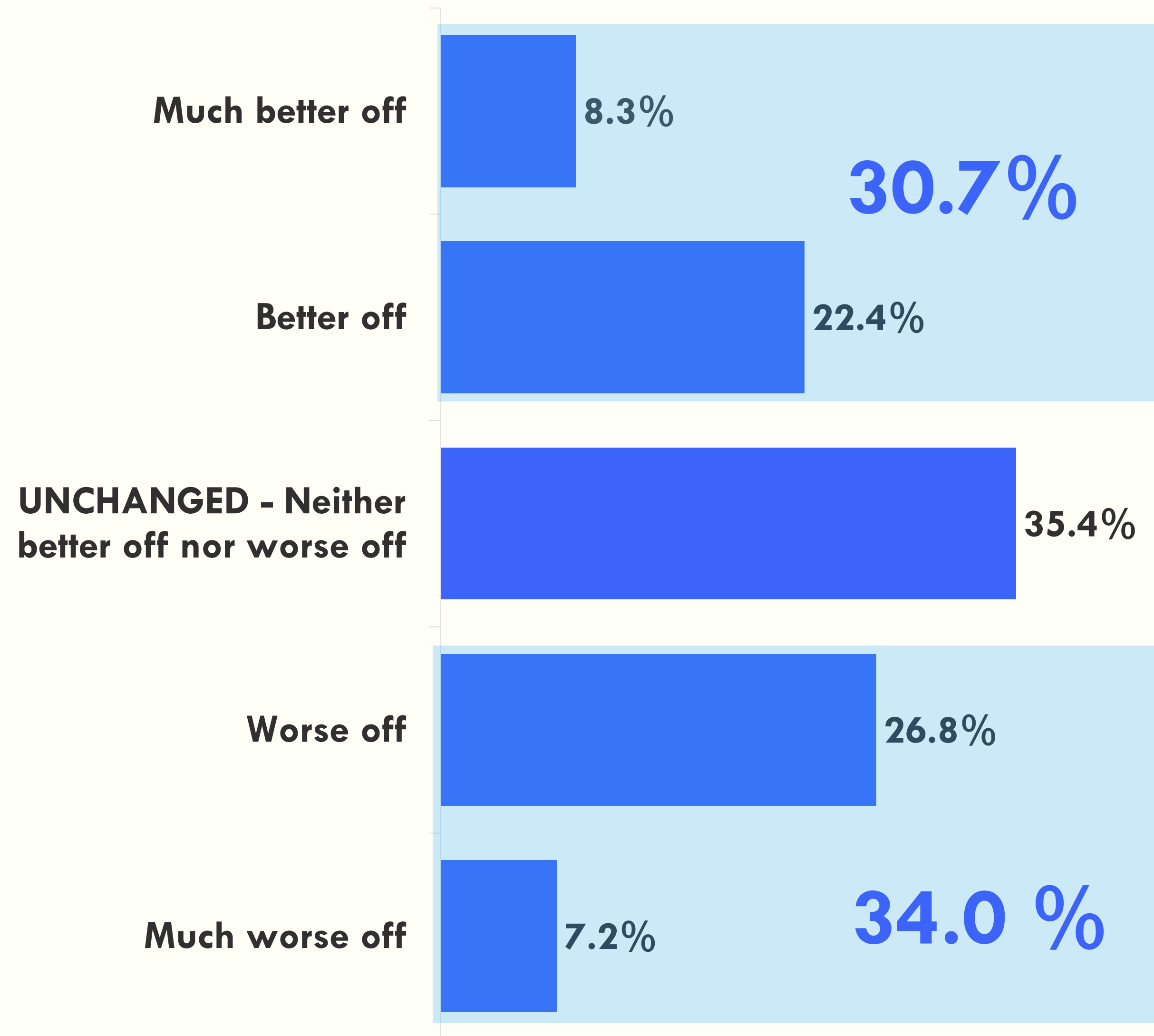


FINANCIAL SENTIMENT



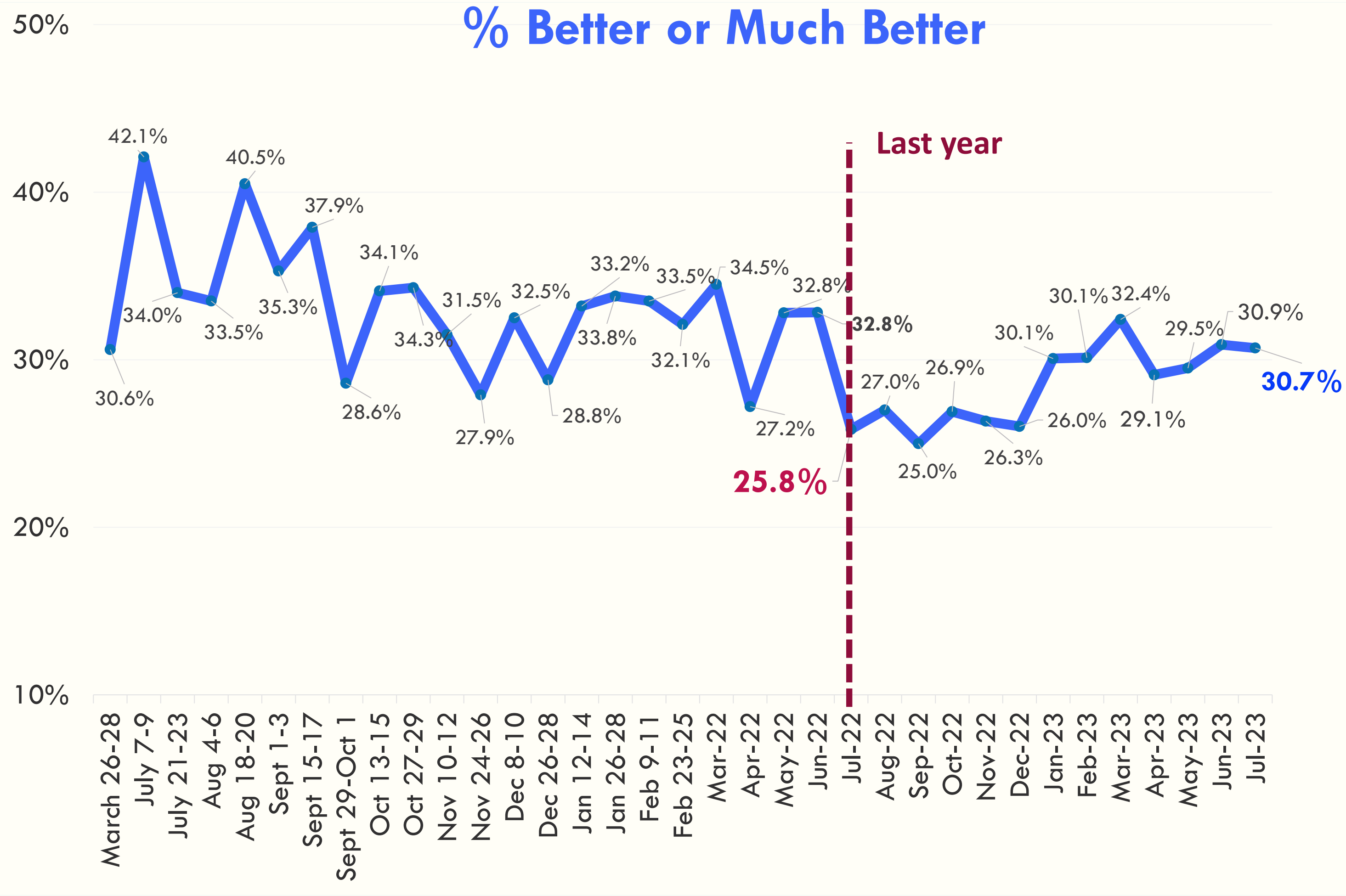
Question:

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



(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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Travelers are feeling better off financially than they were one year 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

7.7%

28.9%

Yes - It is a good time

21.3%

It is neither a good time
nor bad time

35.1%

No - It is a bad time

23.8%

No - It is a very bad time

12.2%

36.0%

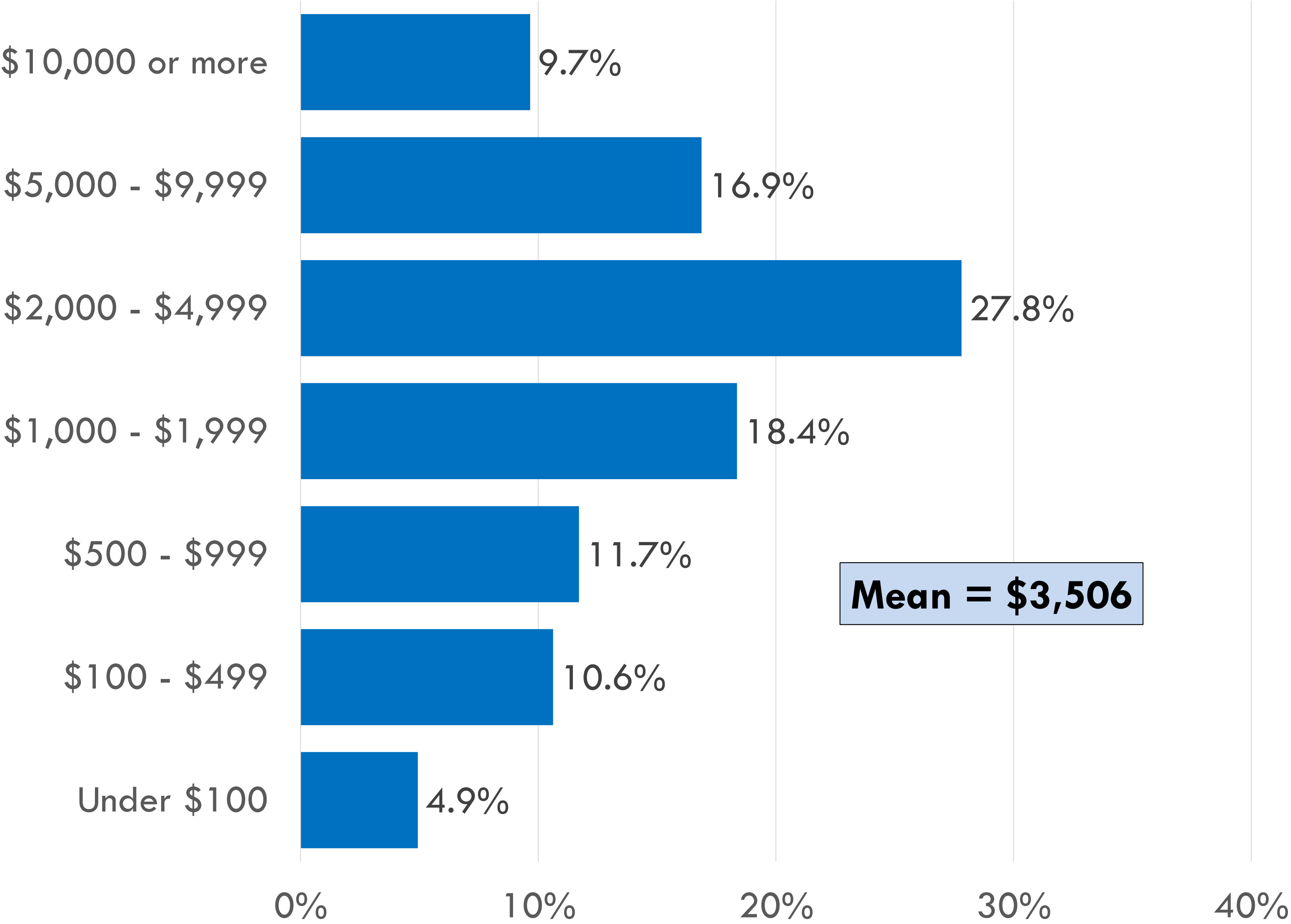
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MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS

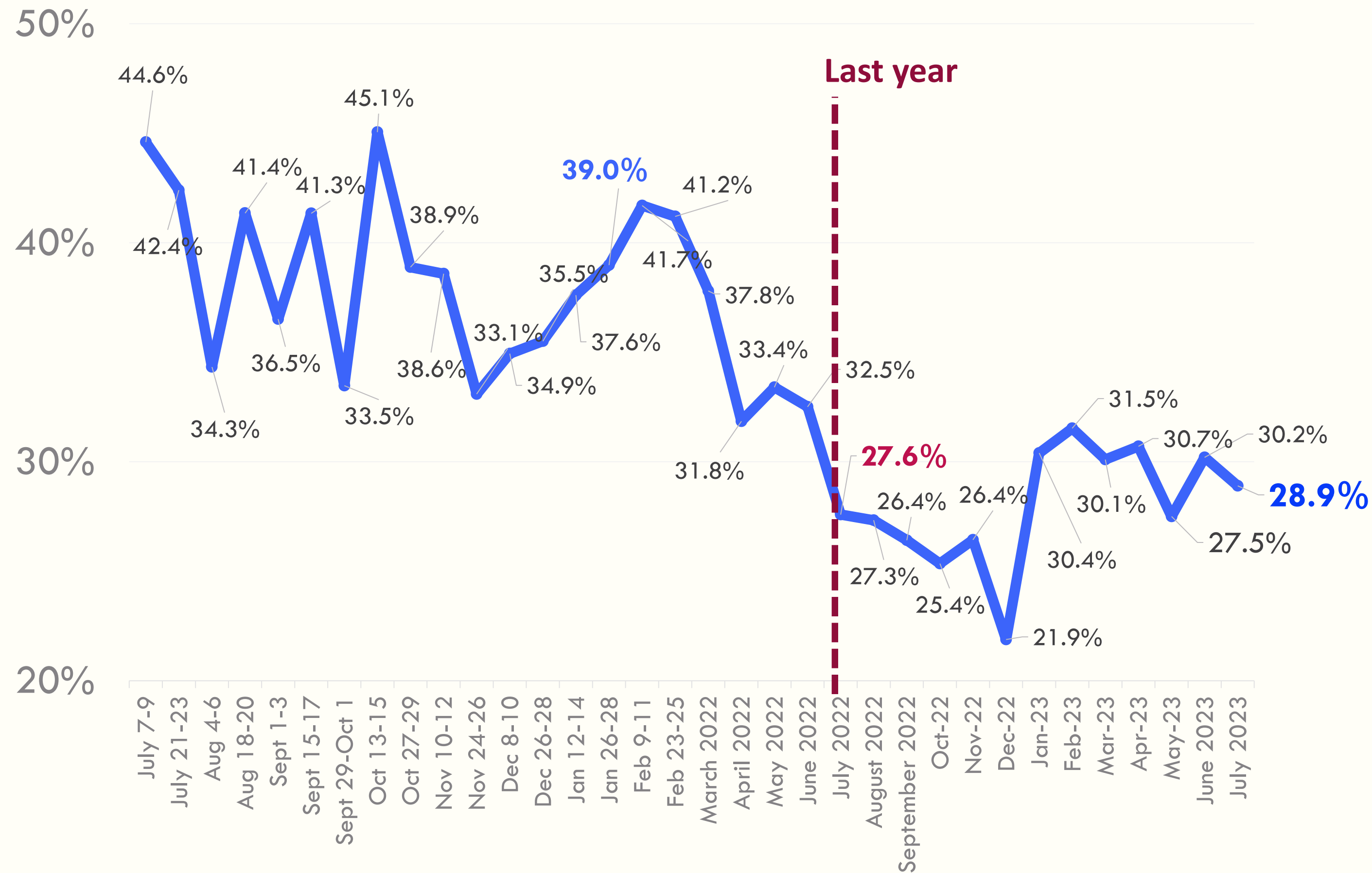
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

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

(Base: All respondents, 4,011 completed surveys.
Data collected July 17-21, 2023.)



60% % Good or Very good time to spend on travel



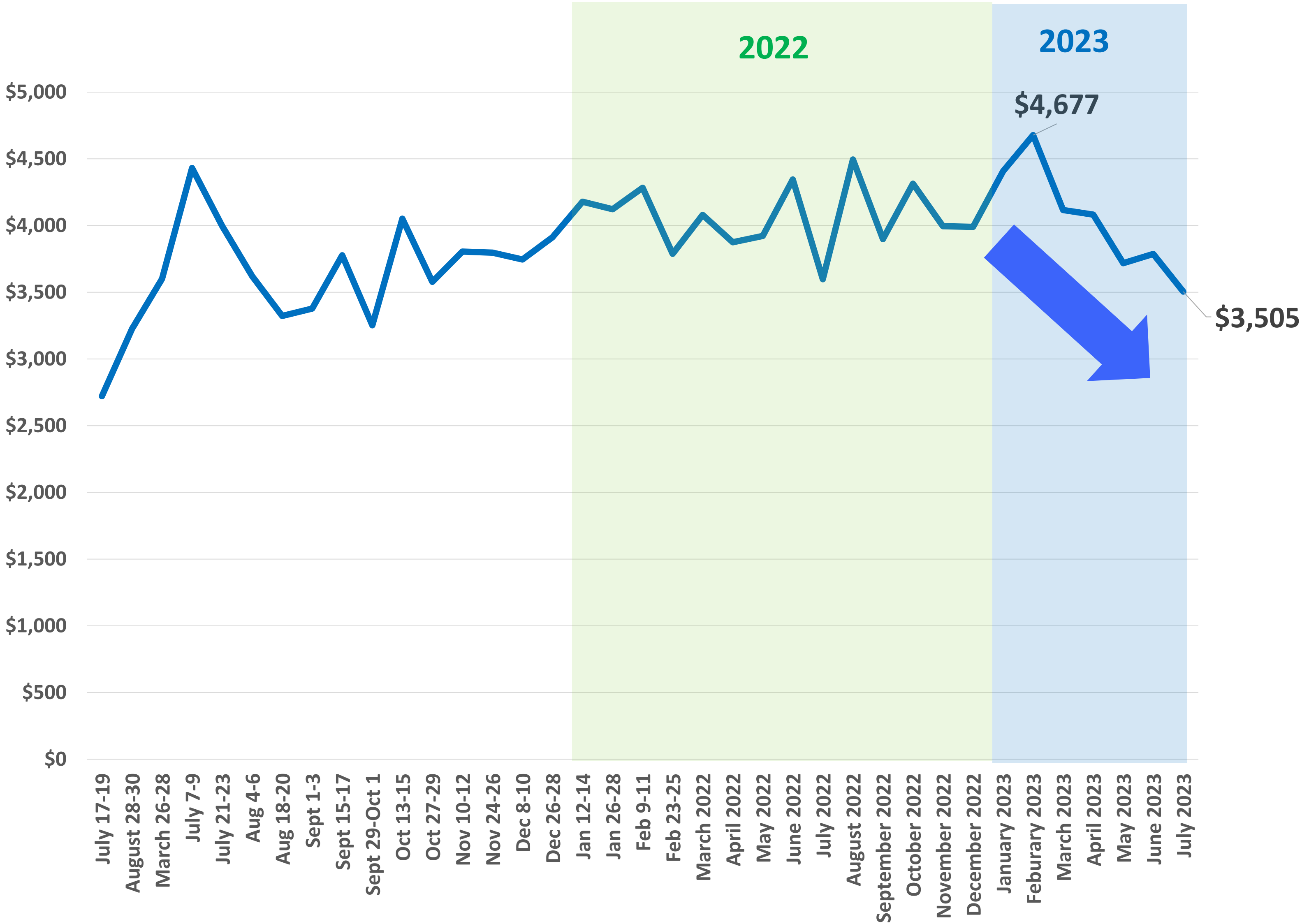
The proportion of Americans who feel it is a “good time” to spend on leisure is only marginally above last year in July.

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?

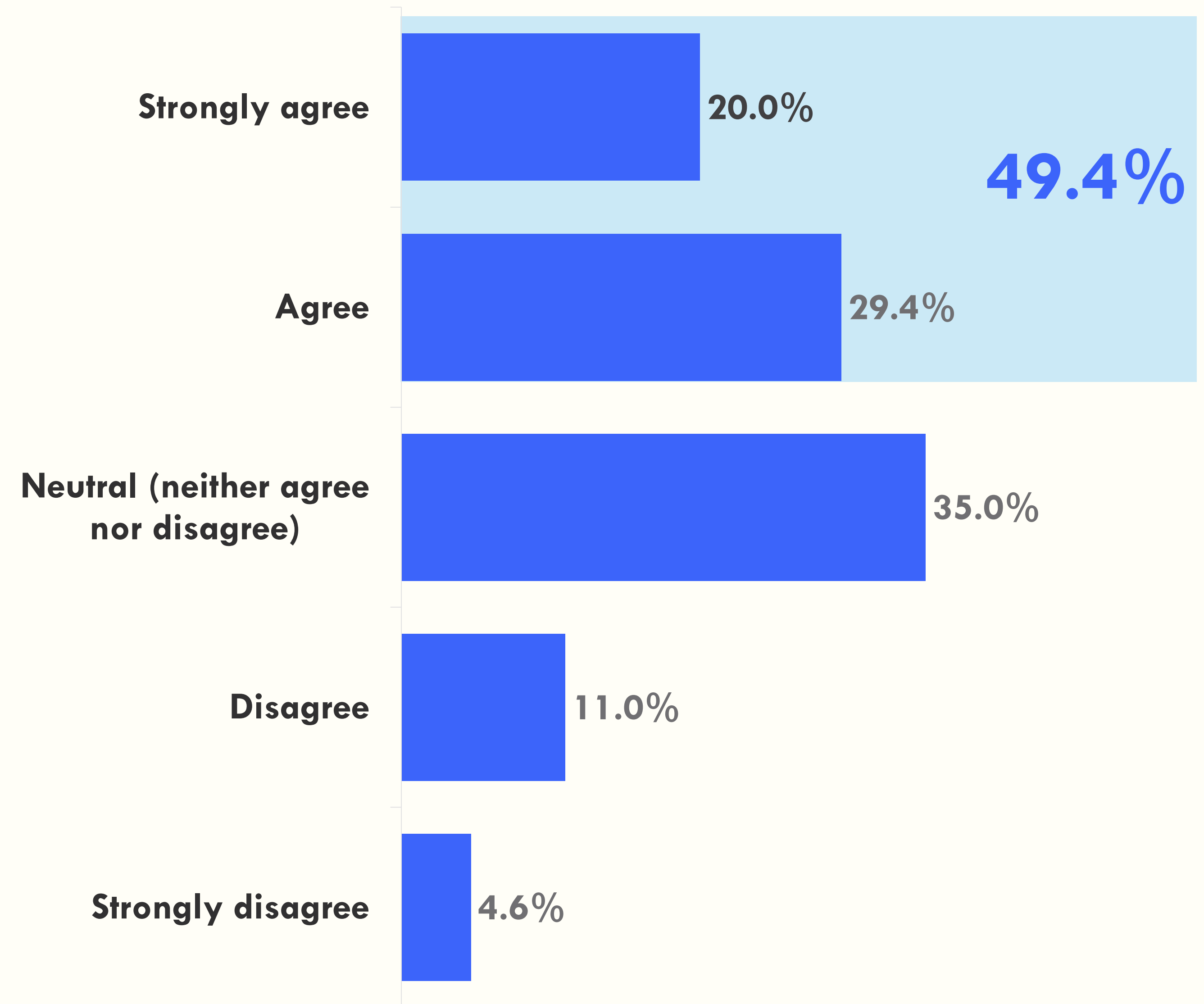
Maximum I would spend on leisure travel (next 12 months):

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



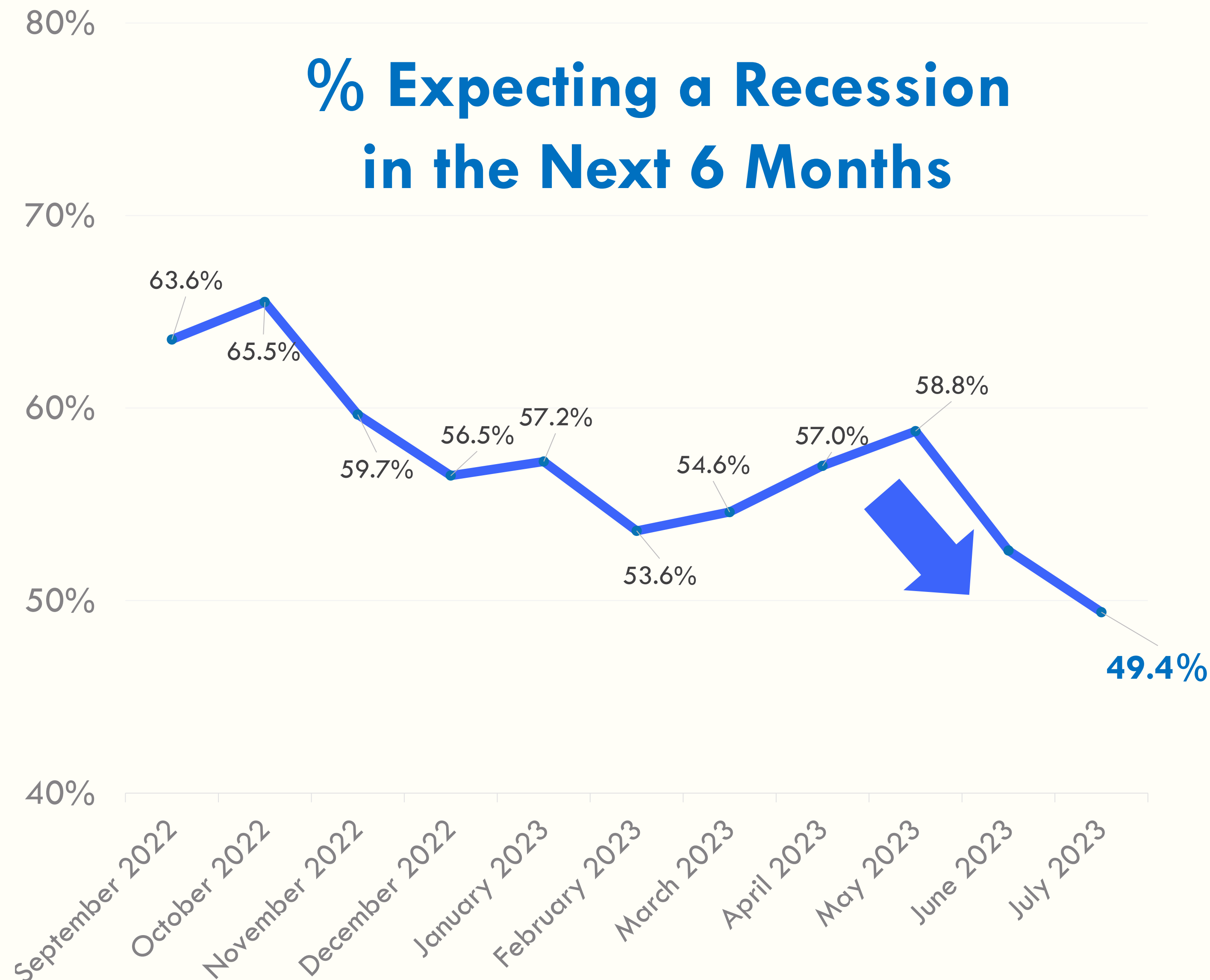
Question:

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



(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

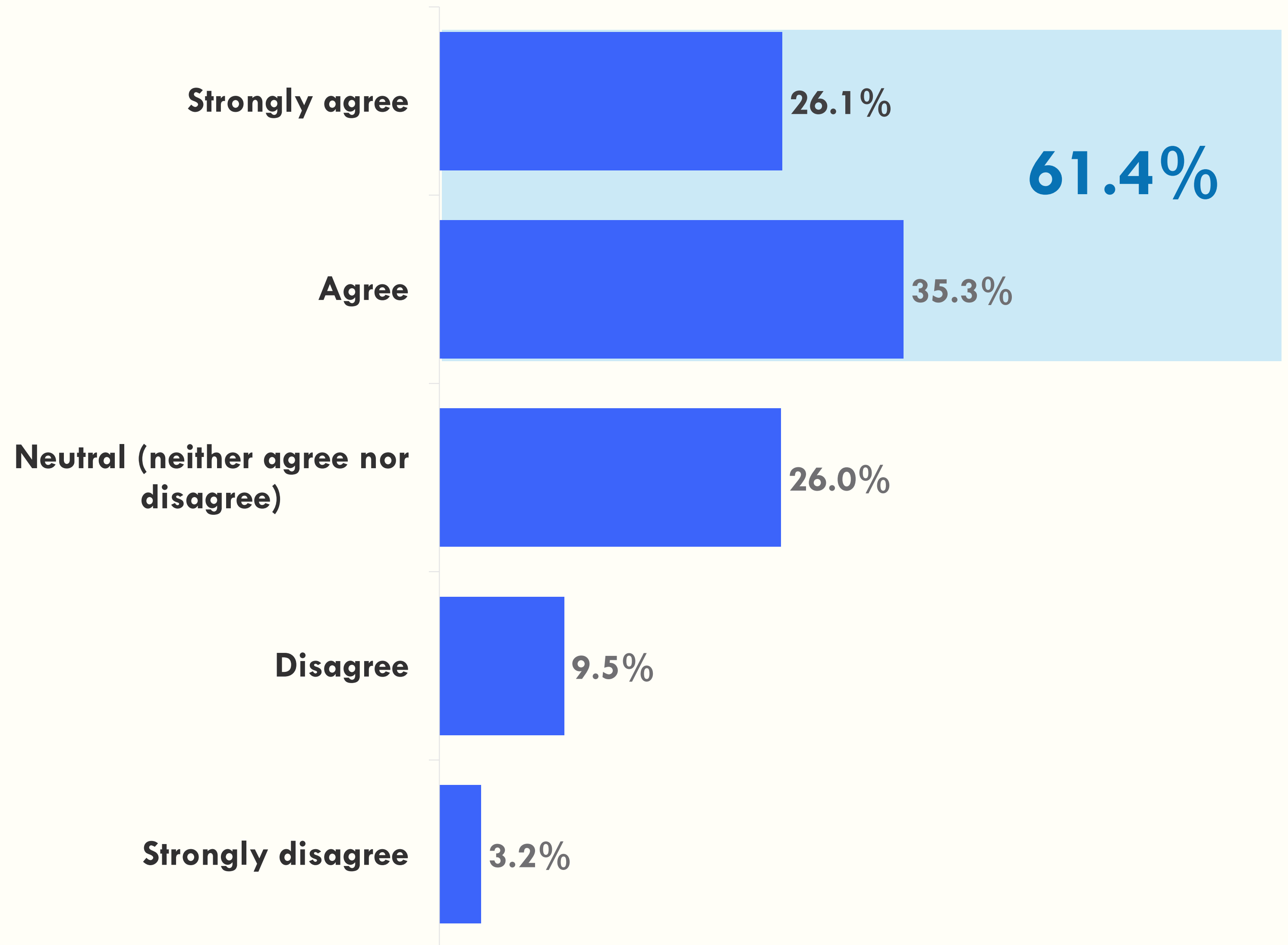
% Expecting a Recession in the Next 6 Months



Recessionary
concerns continue
to diminish.

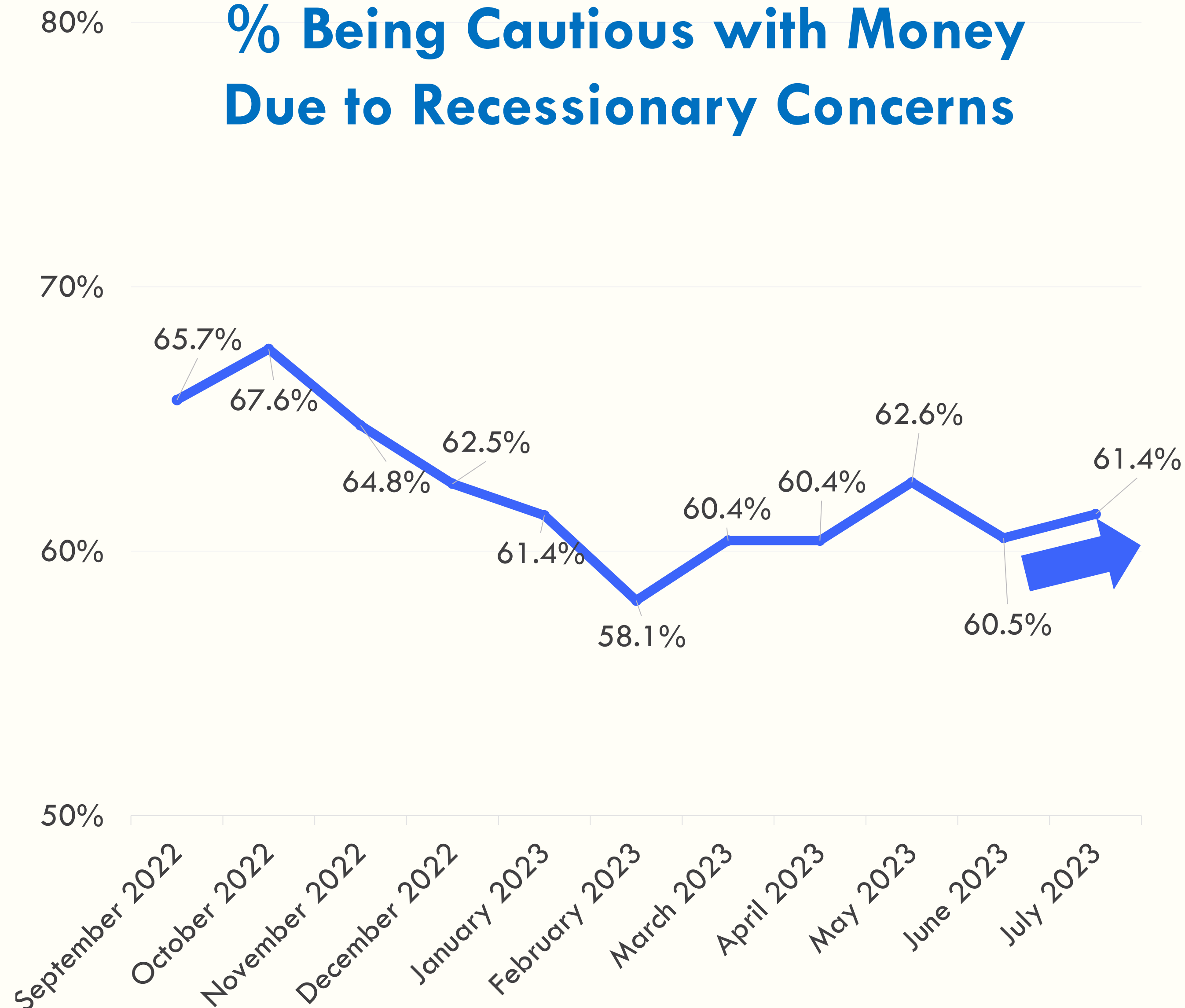
Question:

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



(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

% Being Cautious with Money Due to Recessionary Concerns

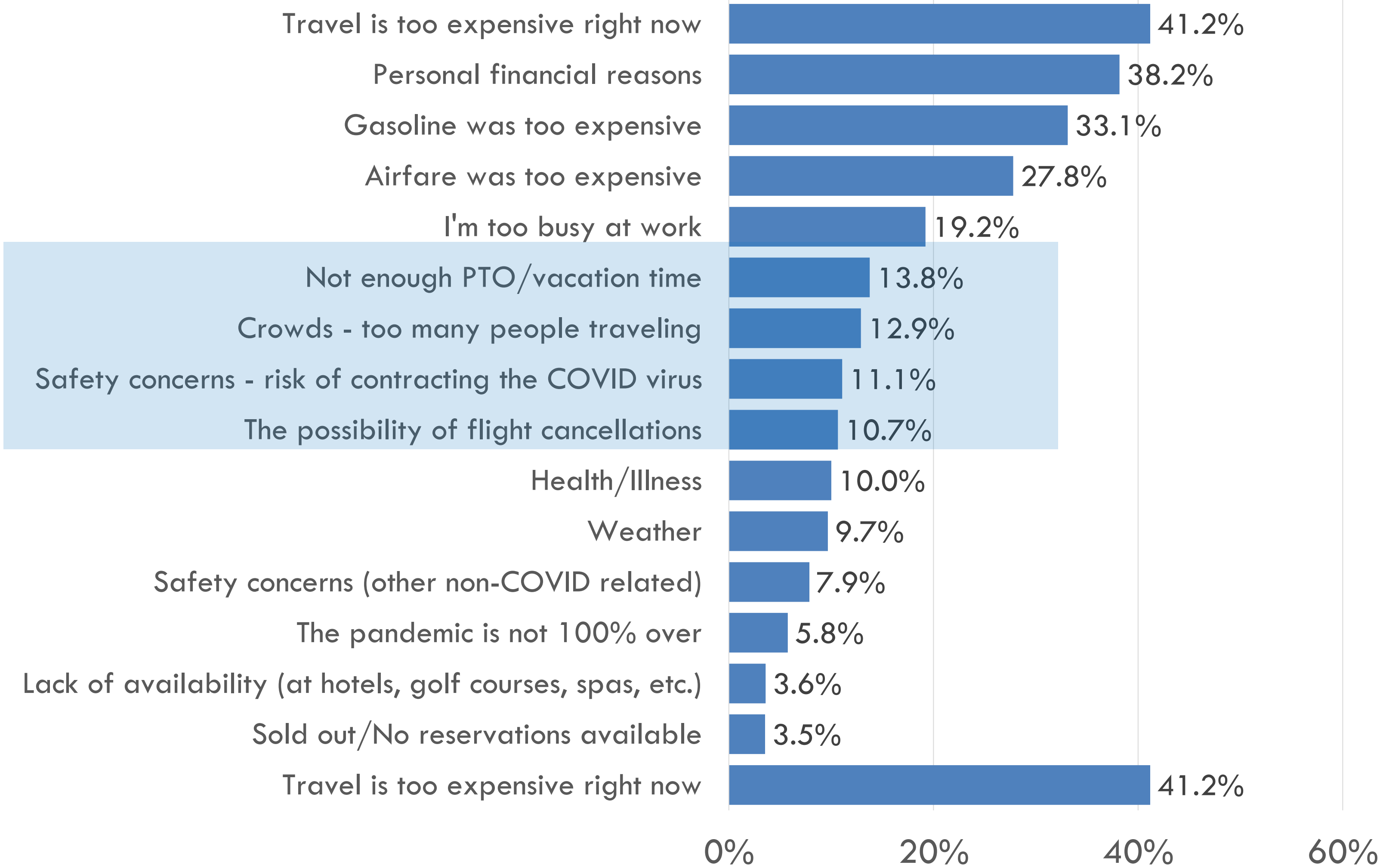


The proportion of travelers exercising spending caution due recessionary concerns increased slightly month.

DETERRENTS TO TRAVELING IN THE PAST 6 MONTHS

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)

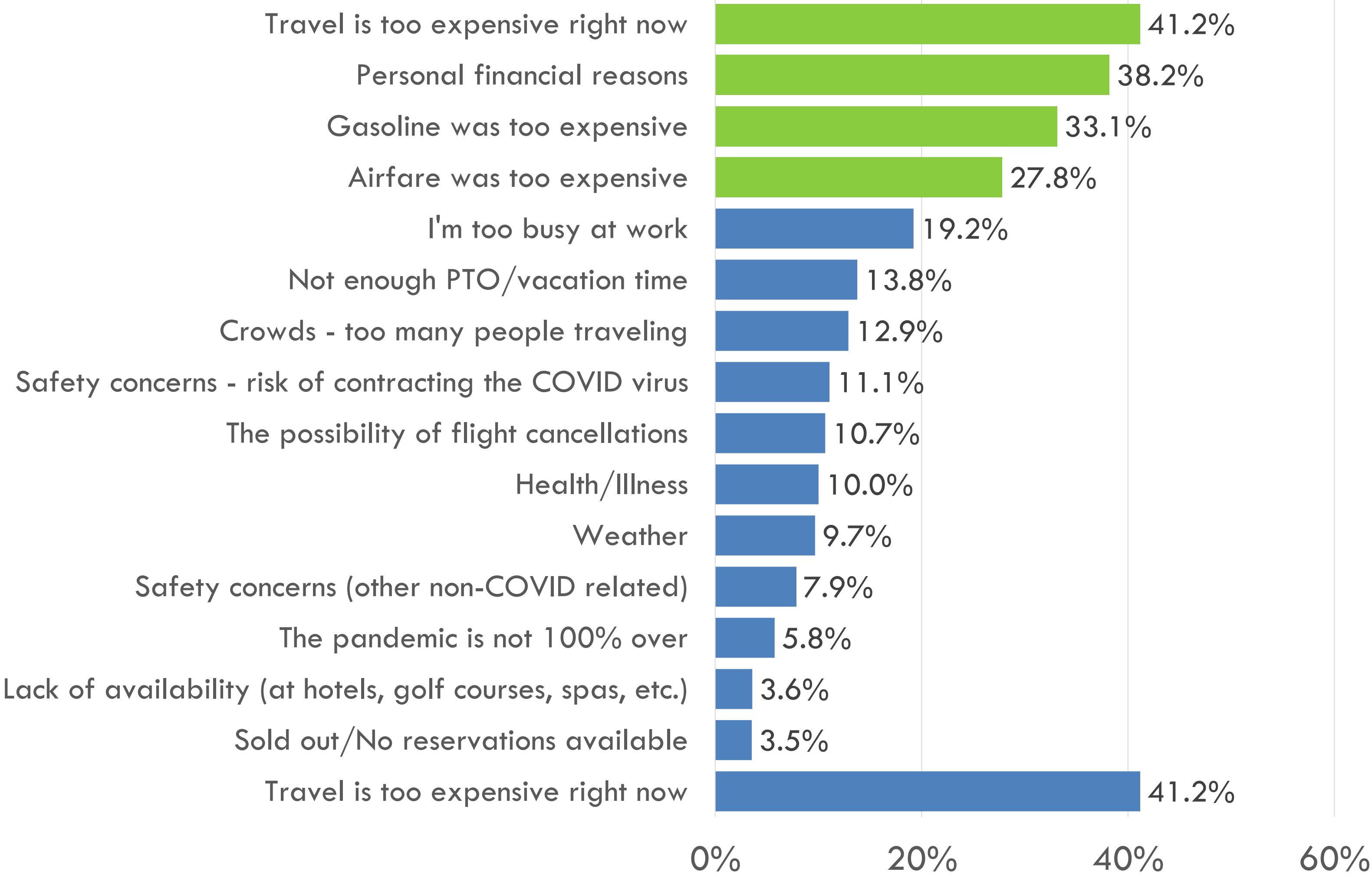
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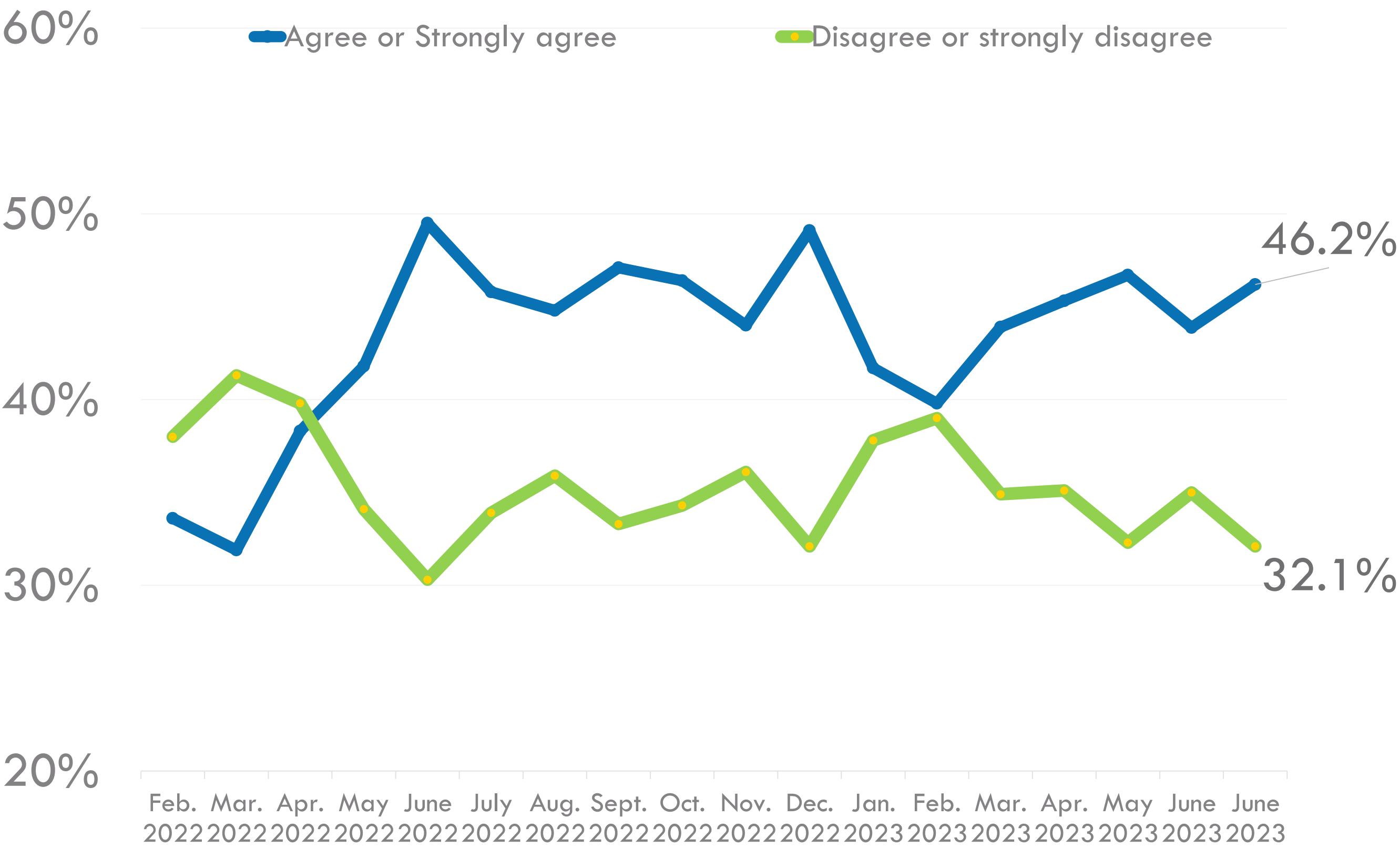
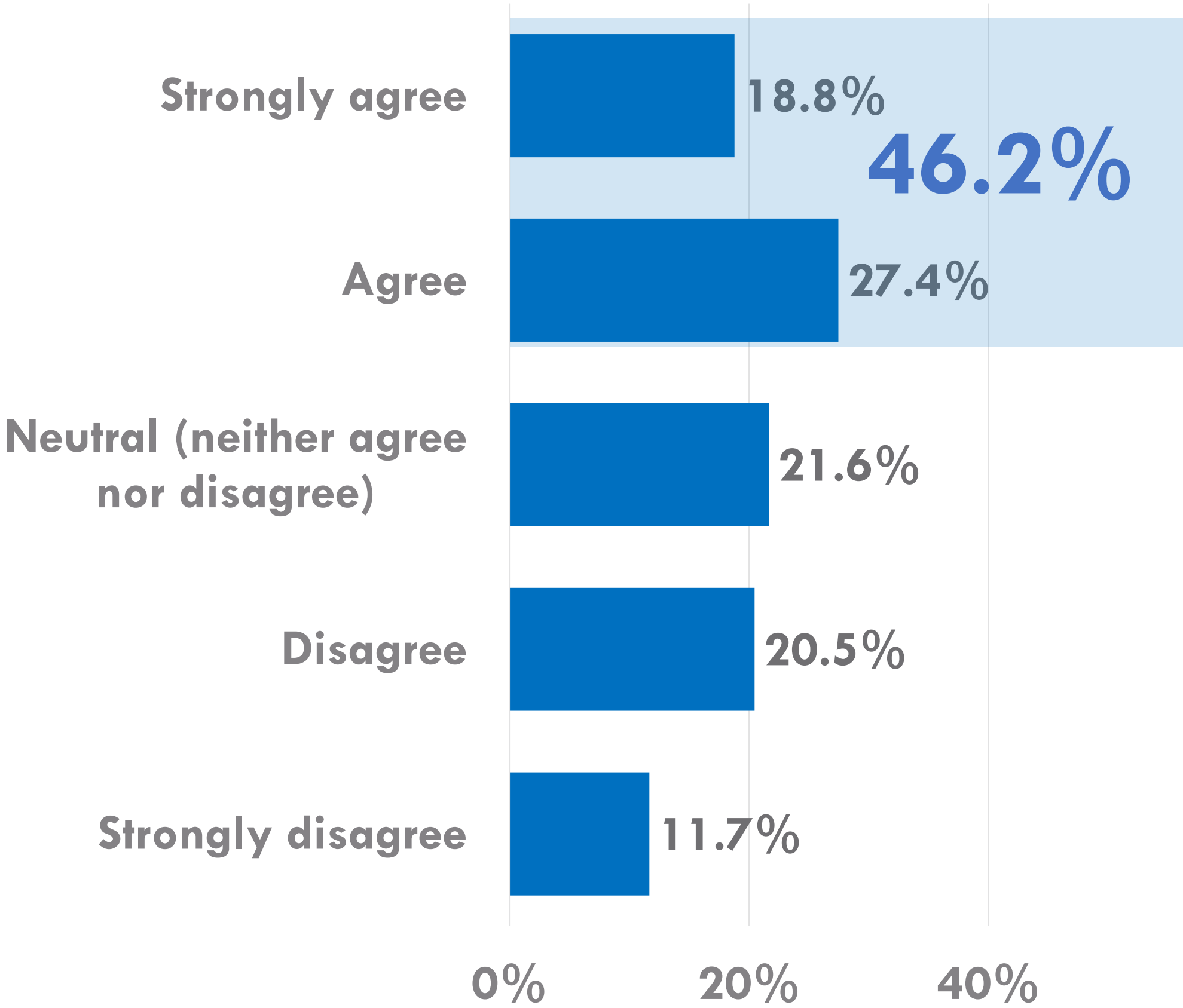
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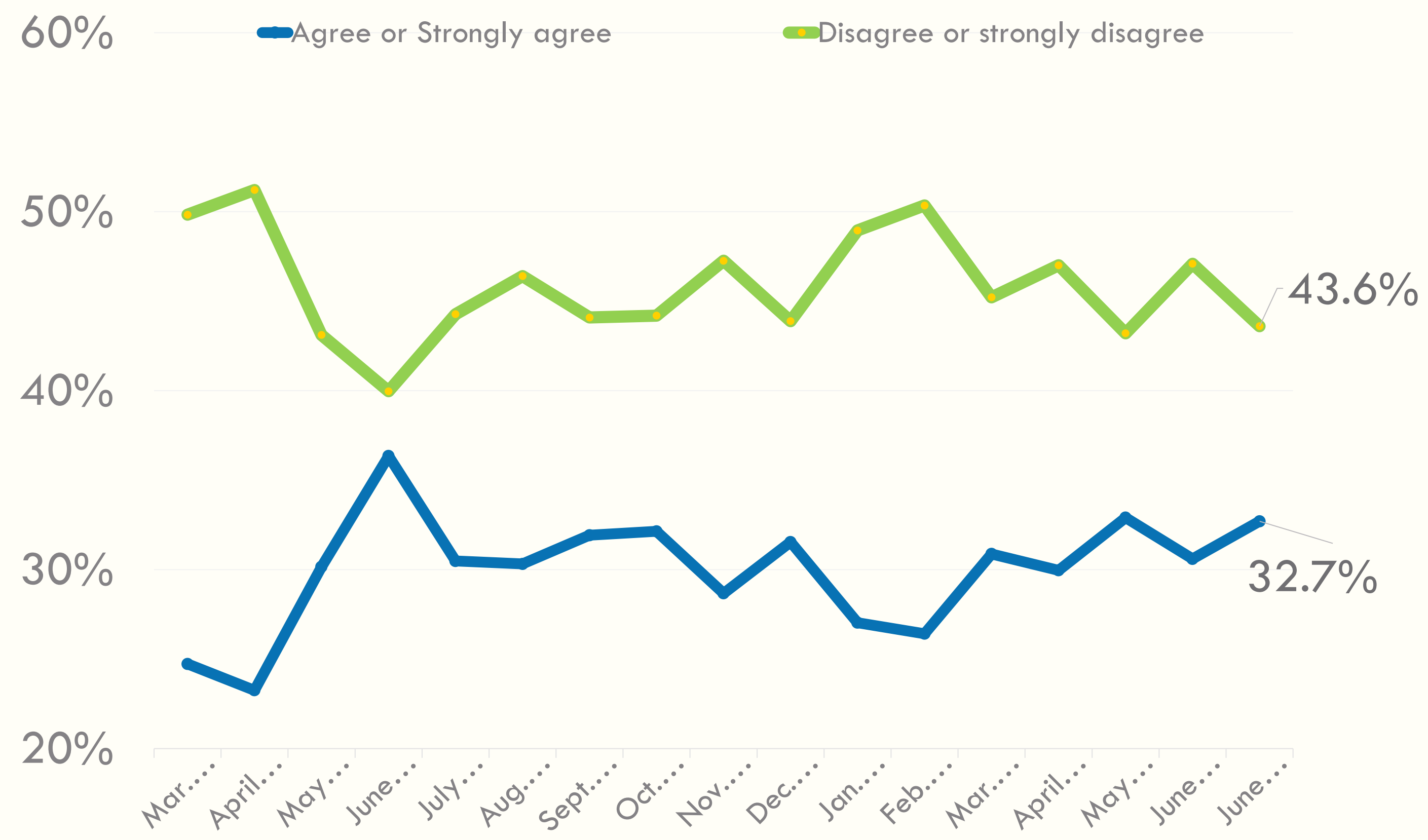
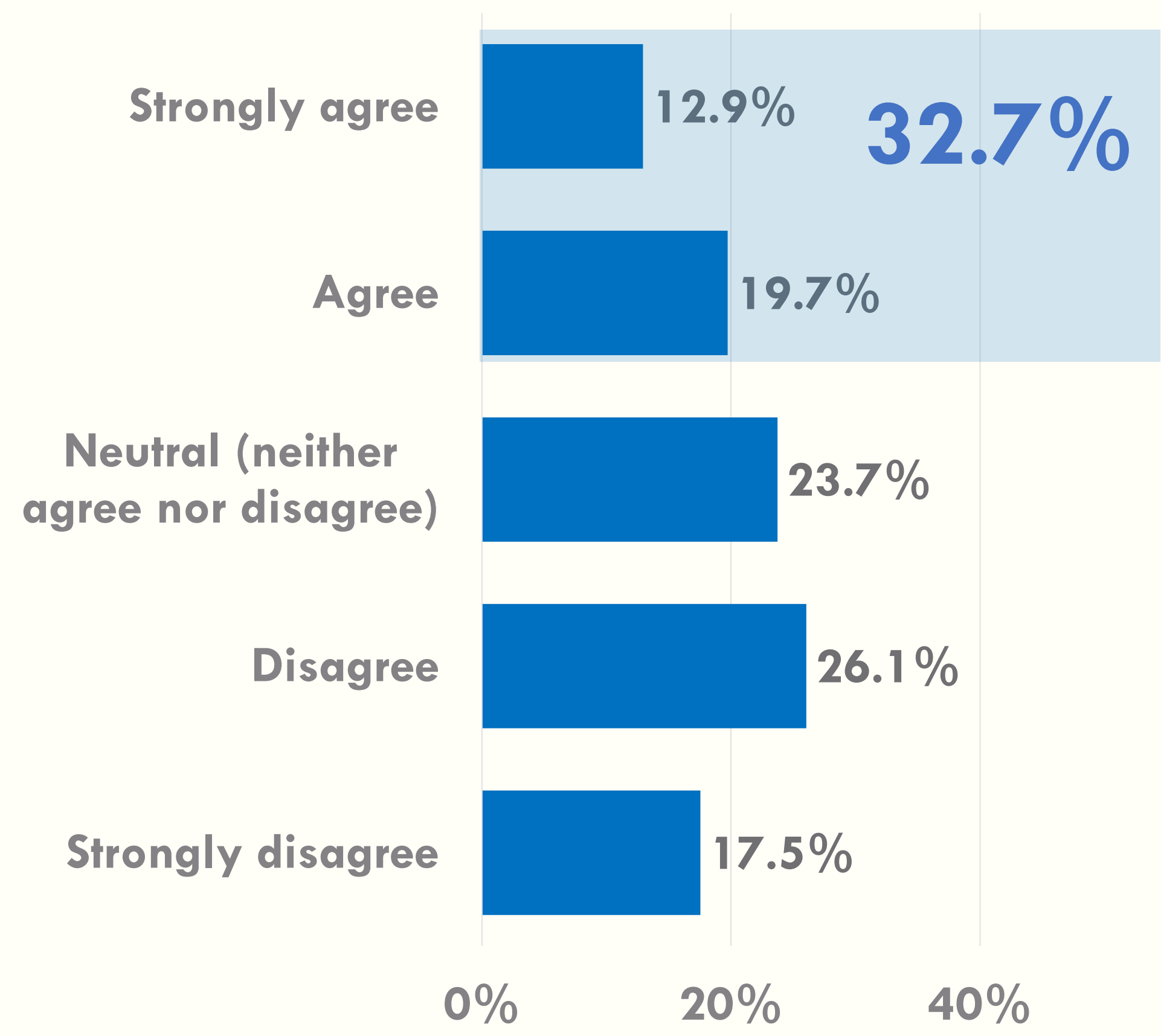
(Base: All respondents, 4,011 completed surveys.
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Statement: High travel prices have kept me from traveling in the past month.

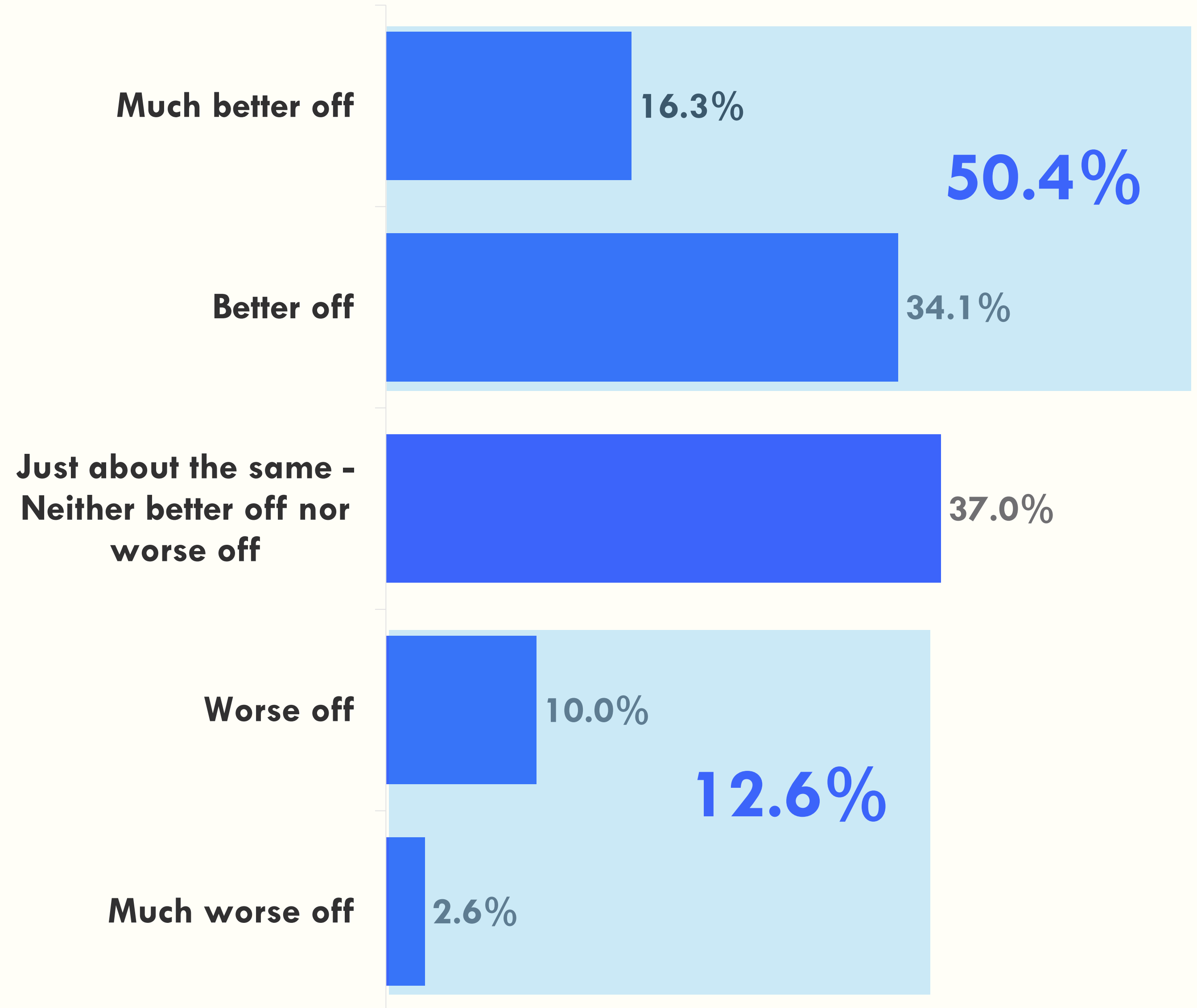


Statement: Recent inflation in consumer prices has led me to cancel an upcoming trip.

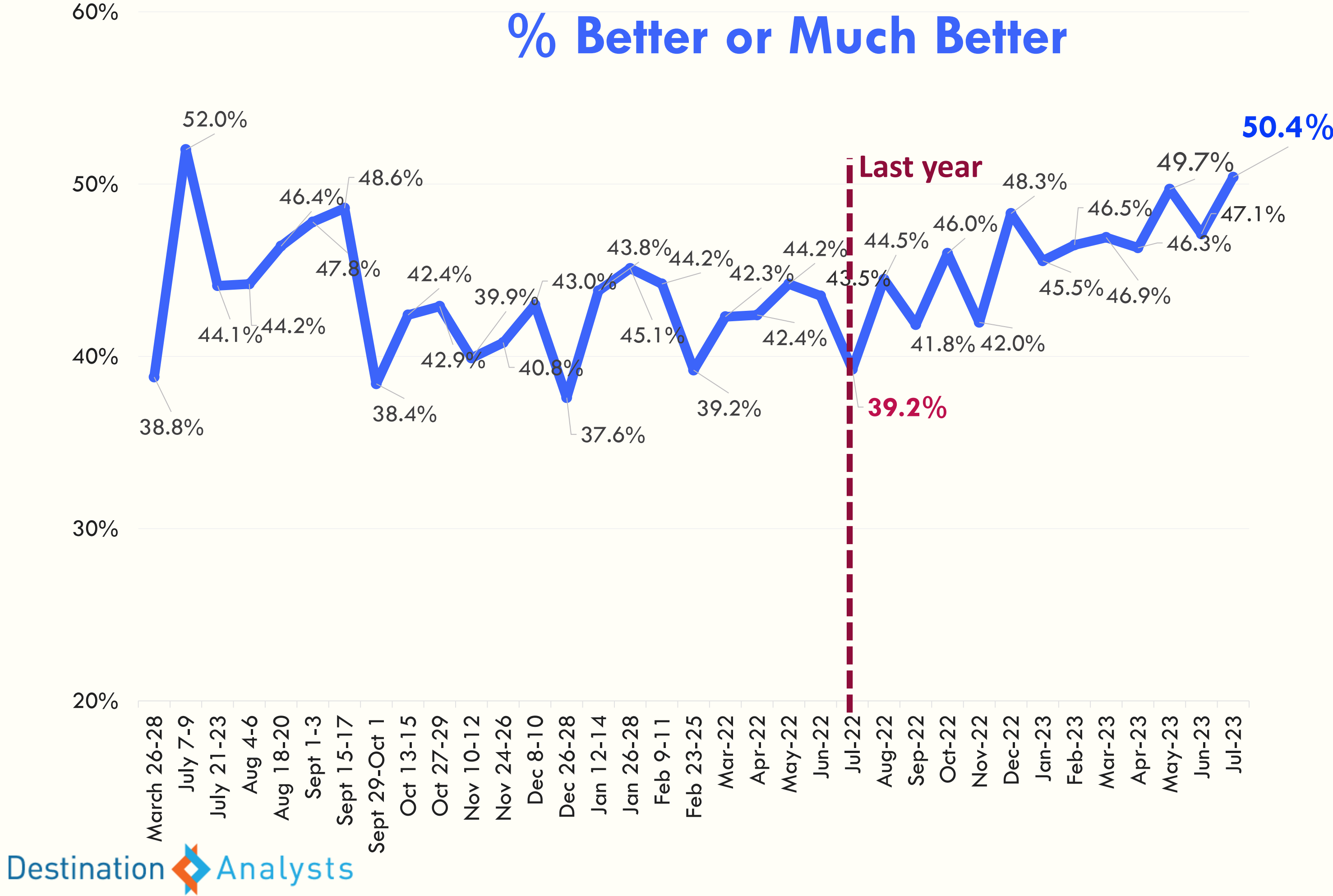


Question:

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?



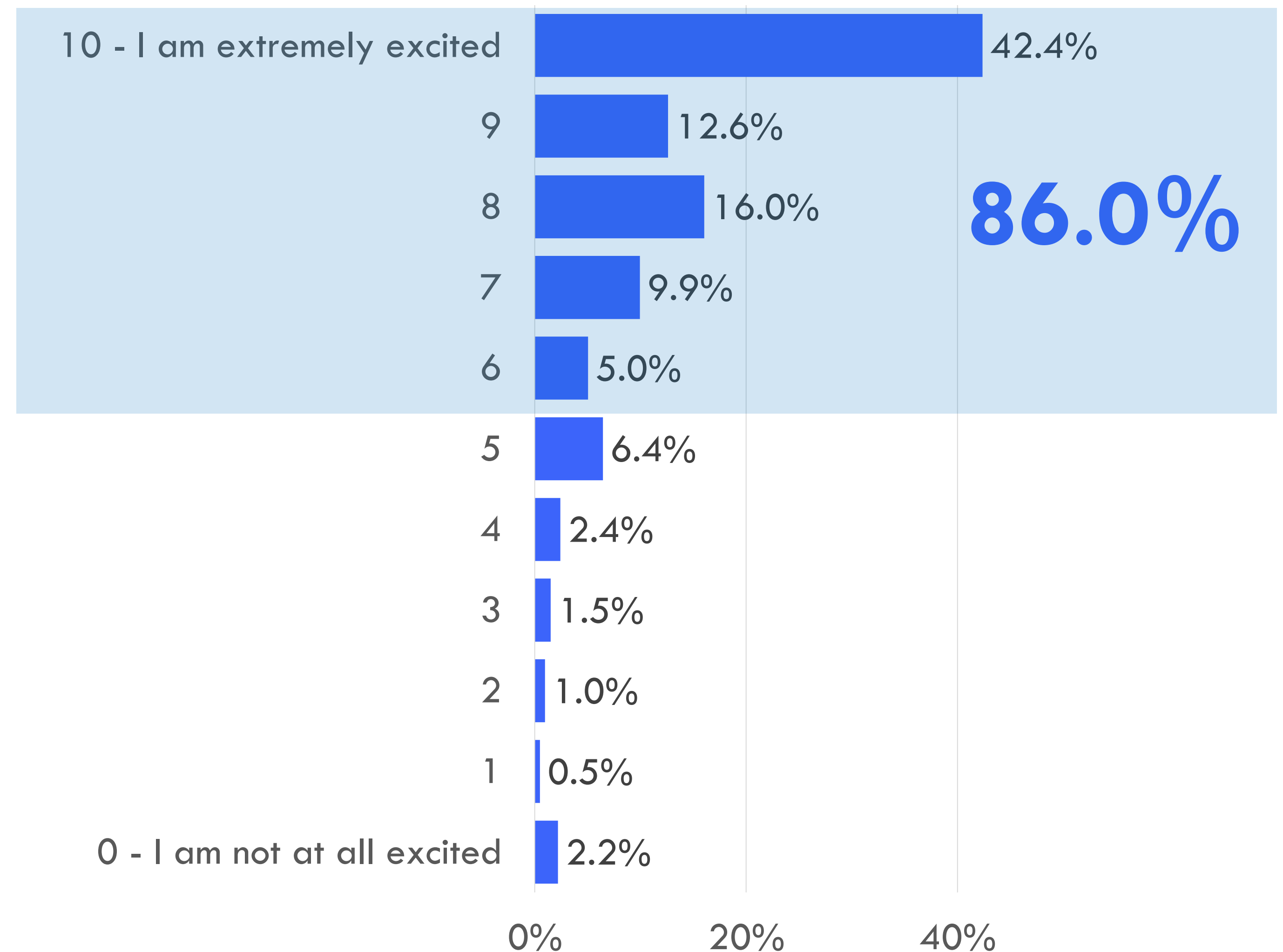
Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Traveler expectations for their financial prospects in the next year continue to improve.

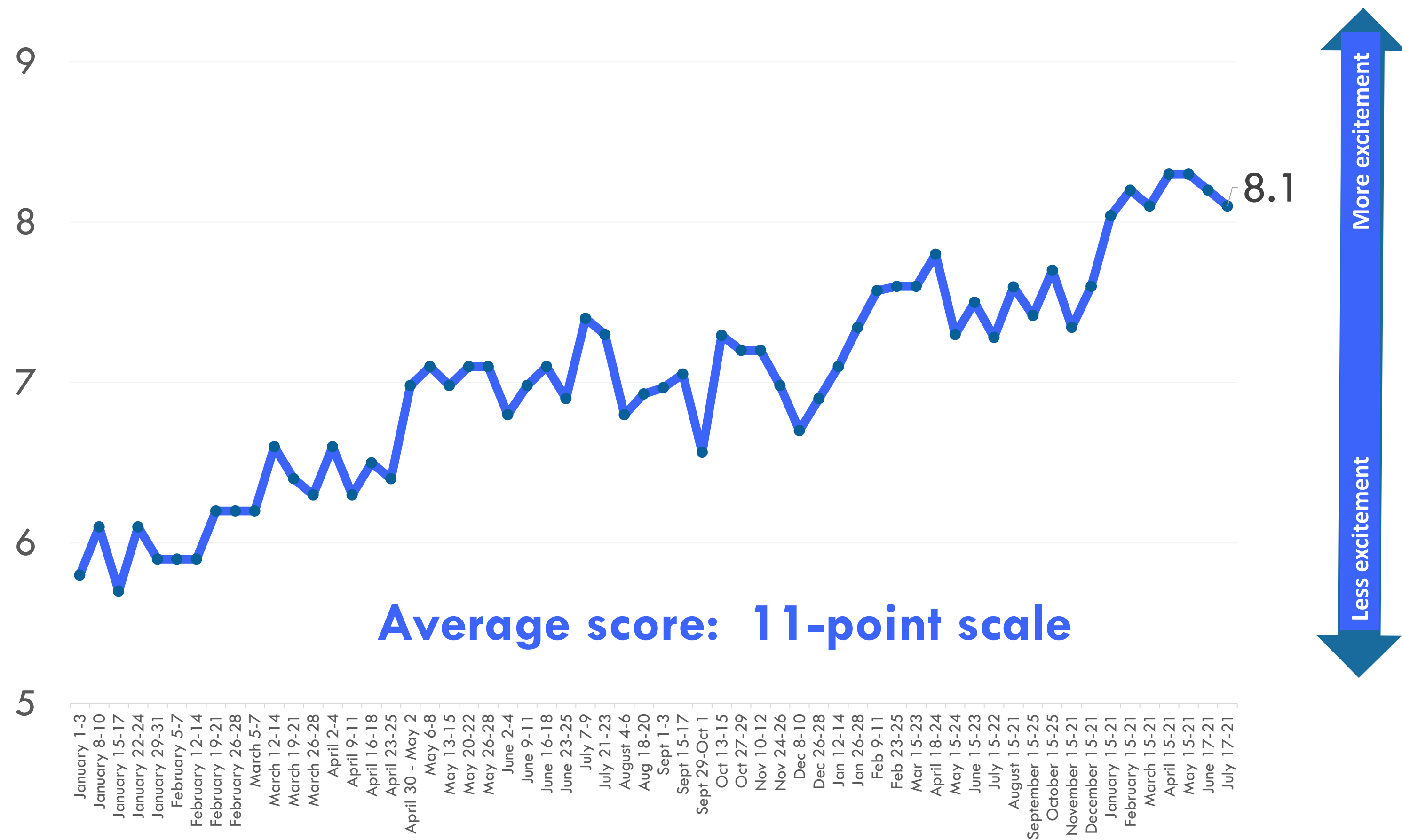
Question:

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, 4,011 completed surveys. Data collected July 17-21, 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)



Despite being down slightly from last month, travel enthusiasm remains at record levels

TRAVEL SENTIMENT INDICES

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

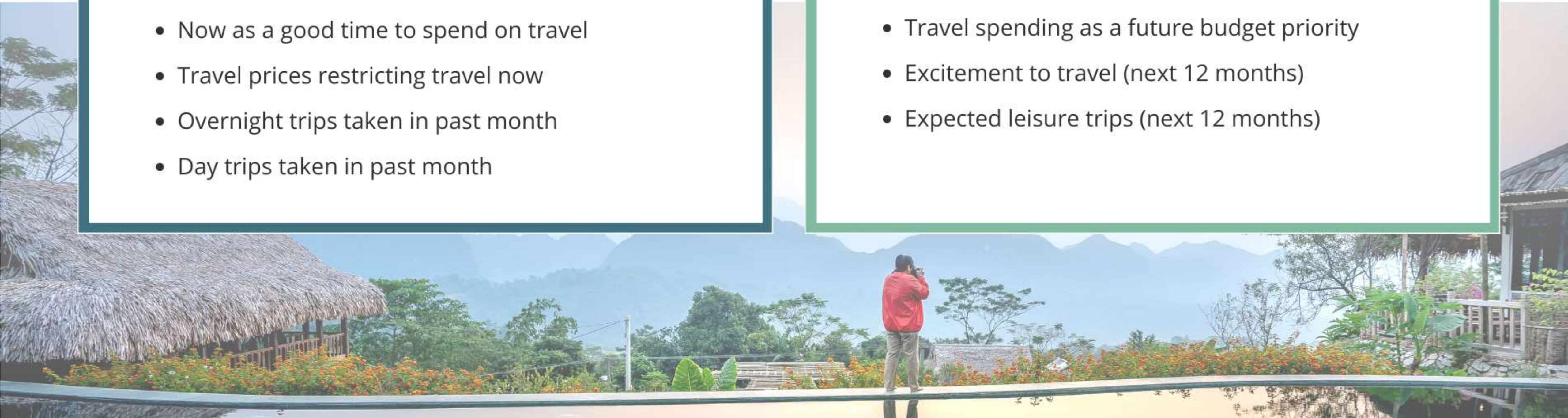
Index values are calculated by combining key questions.

Current Travel Sentiment Index:

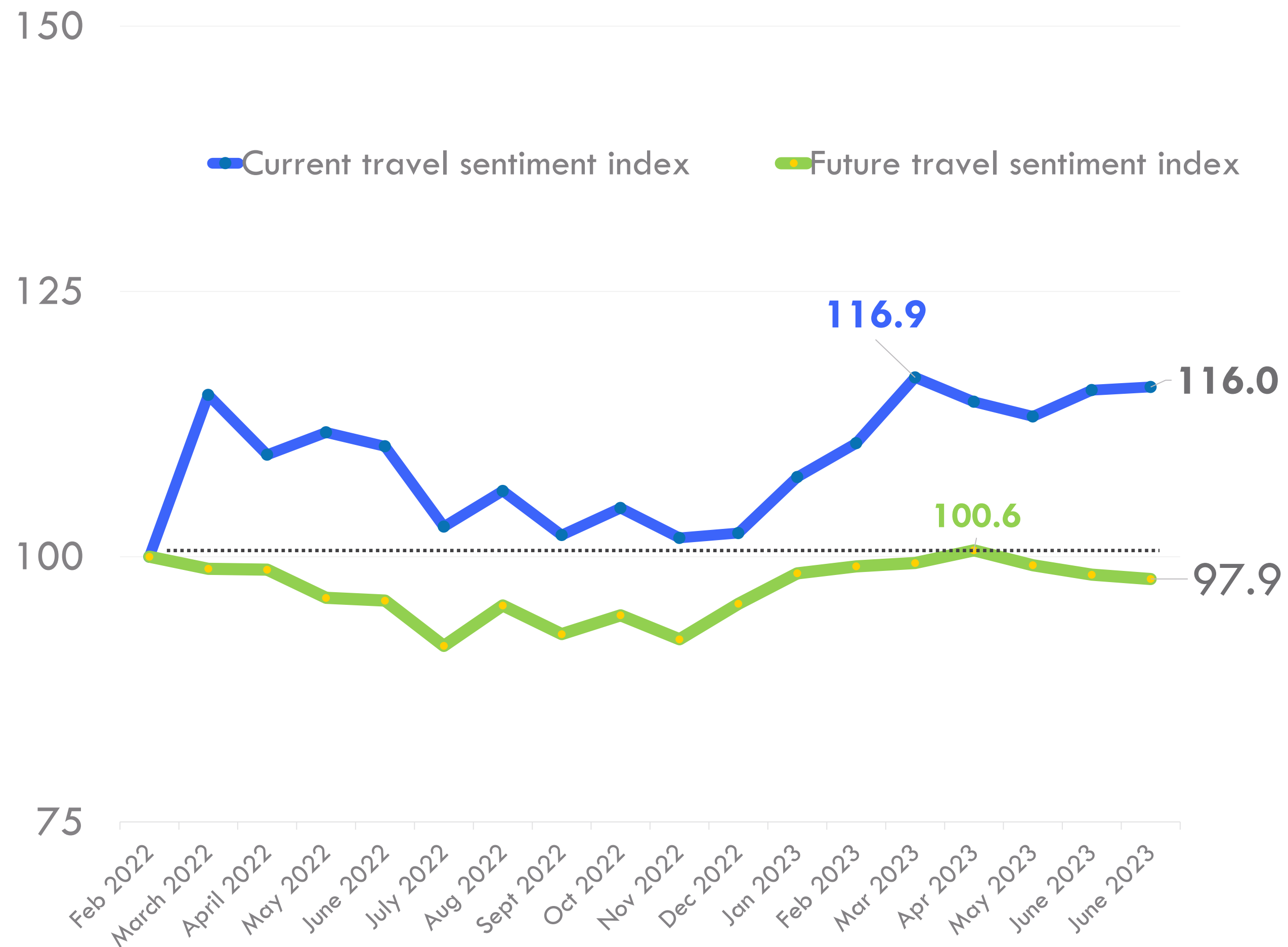
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

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.

- Current travel enthusiasm improved this month.
- Expectations for future travel were relatively flat this month.

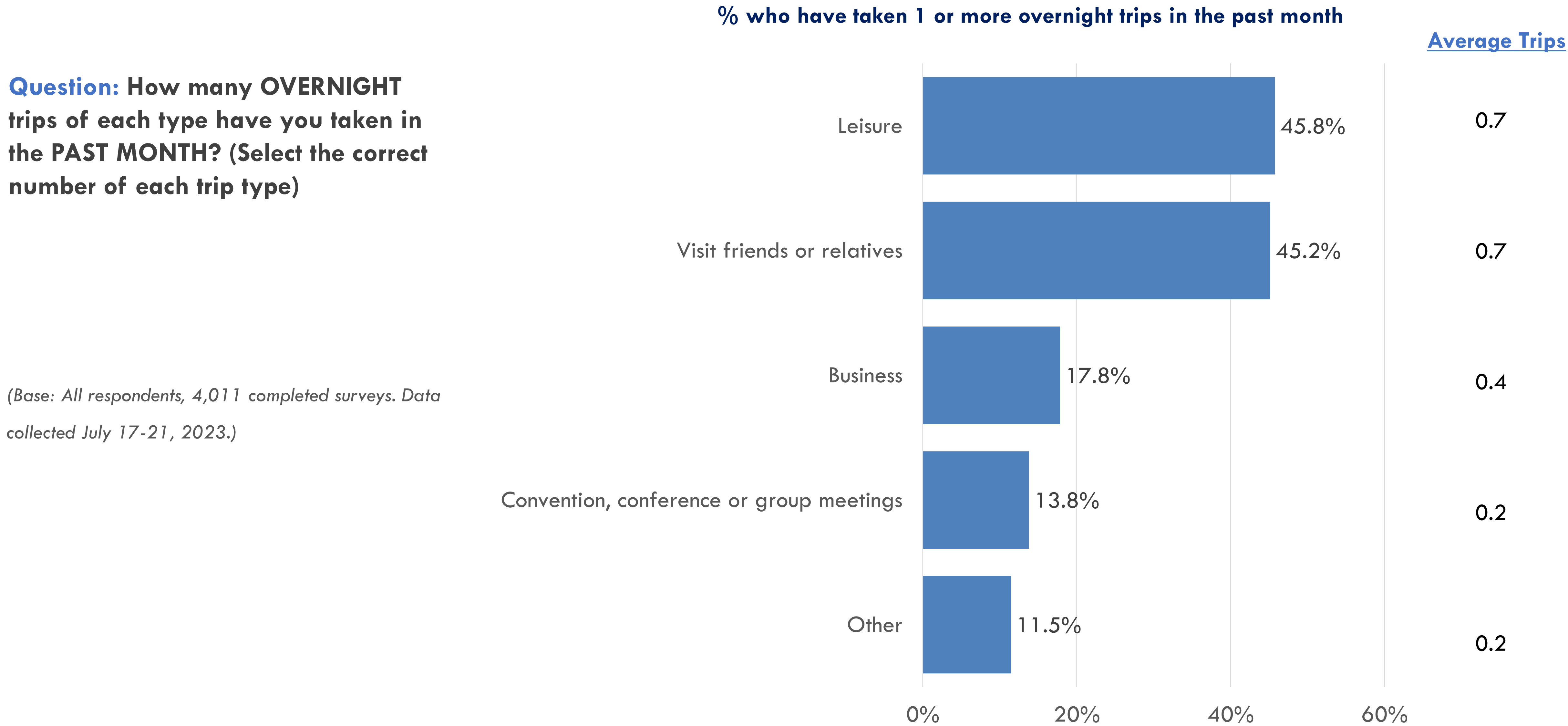
RECENT TRAVEL VOLUME



OVERNIGHT TRIPS IN THE PAST MONTH: BY TRIP TYPE

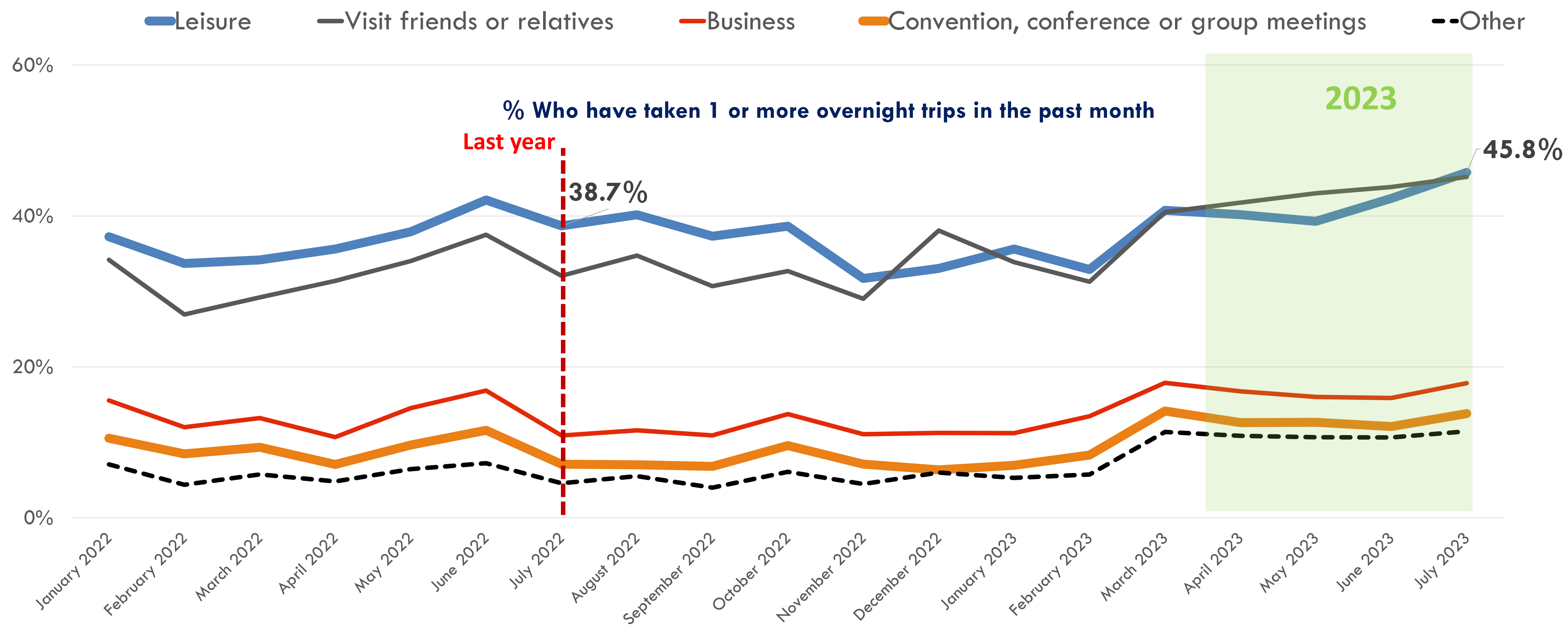
Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)

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OVERNIGHT TRIPS IN THE PAST MONTH: BY TRIP TYPE

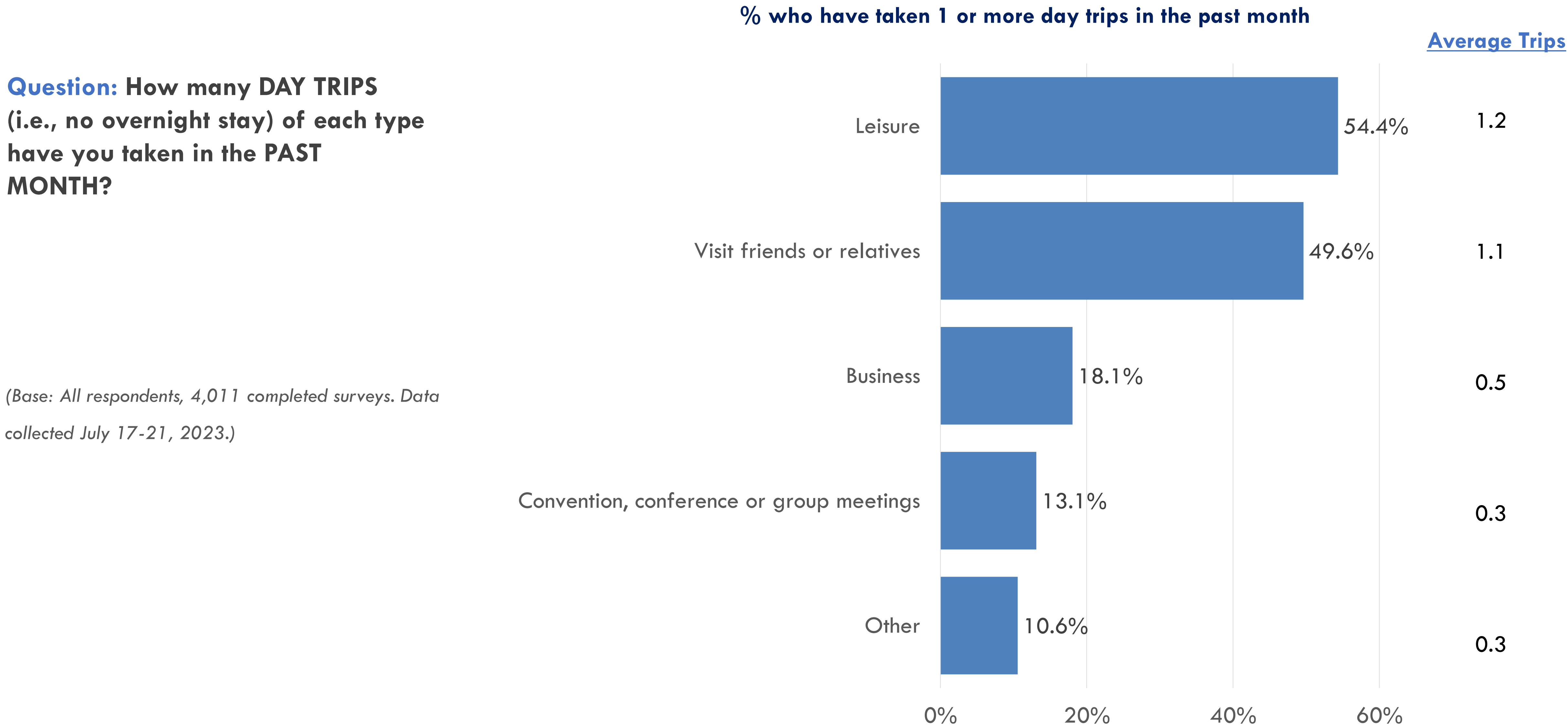
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DAY TRIPS IN THE PAST MONTH: BY TRIP TYPE

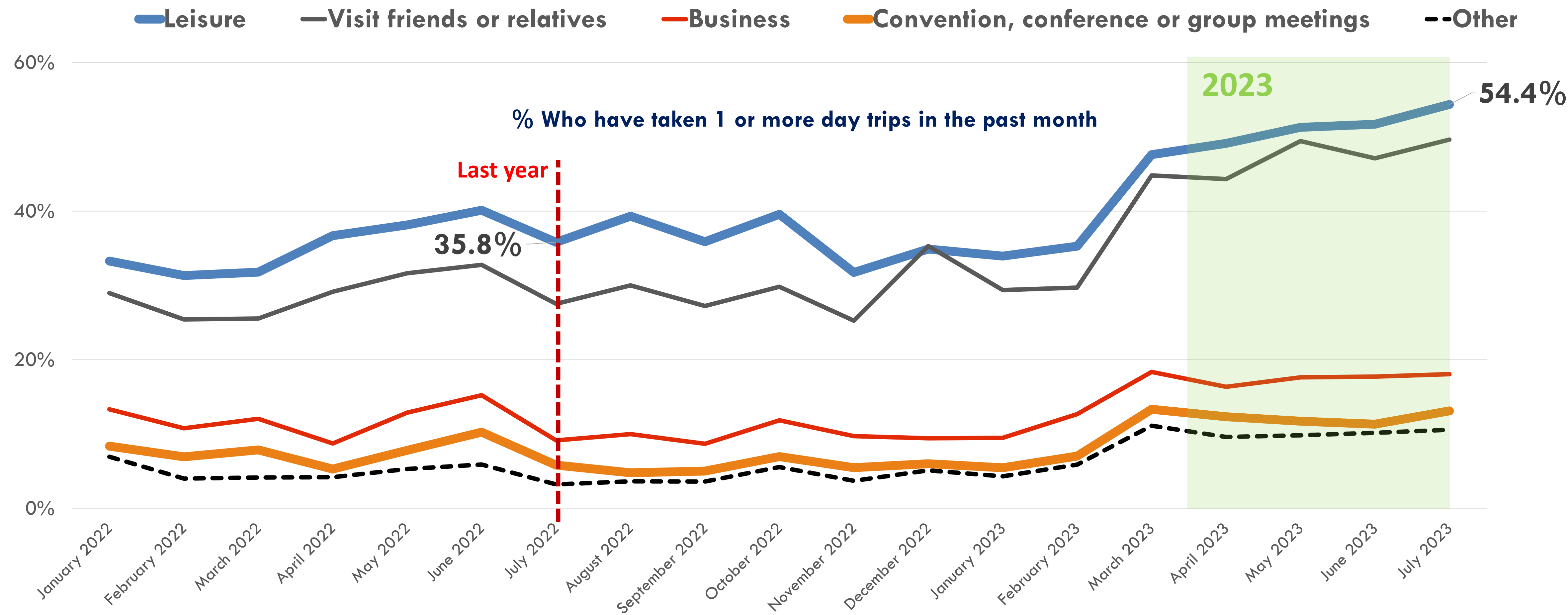
Question: How many DAY TRIPS (i.e., no overnight stay) of each type have you taken in the PAST MONTH?

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DAY TRIPS IN THE PAST MONTH: BY TRIP TYPE

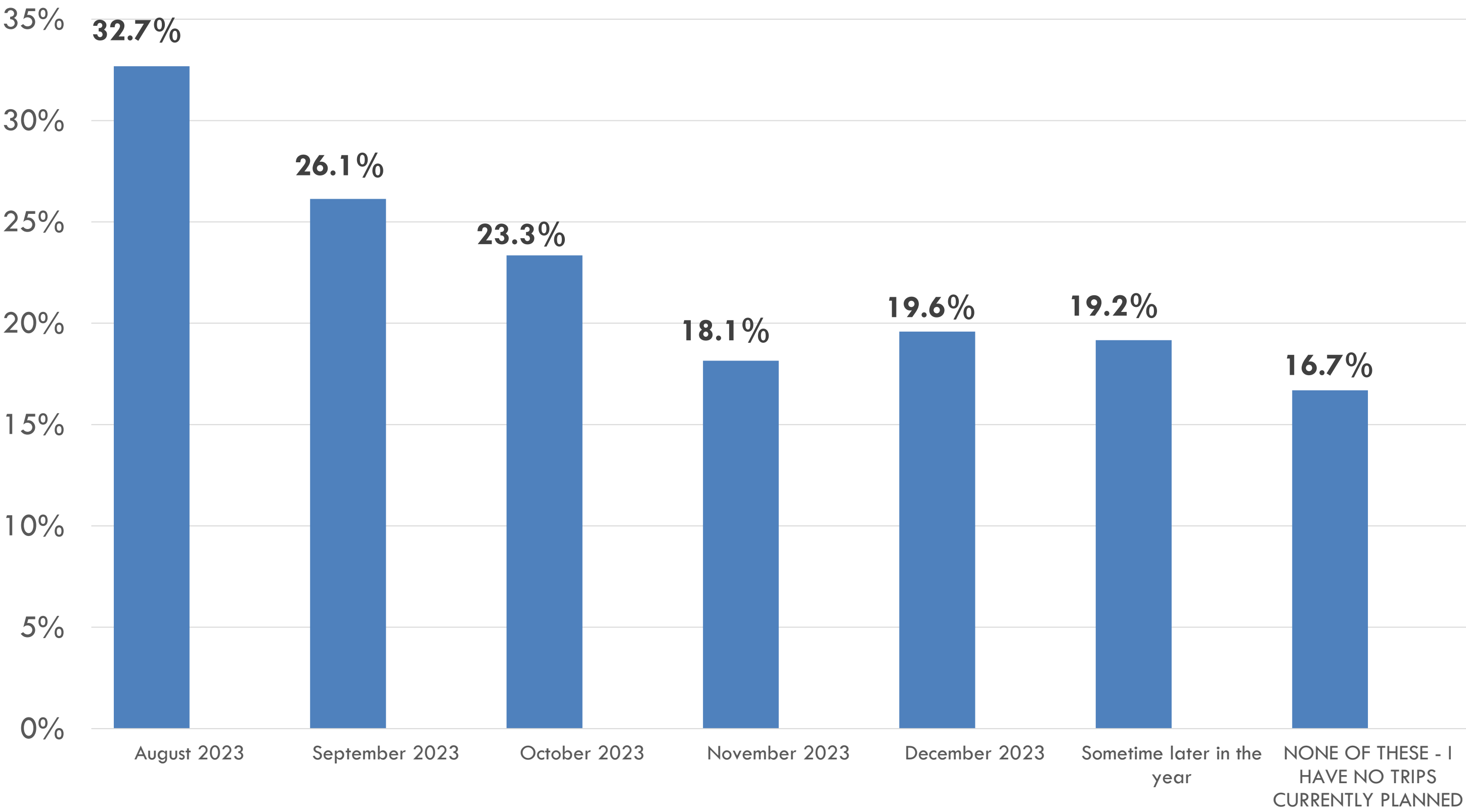
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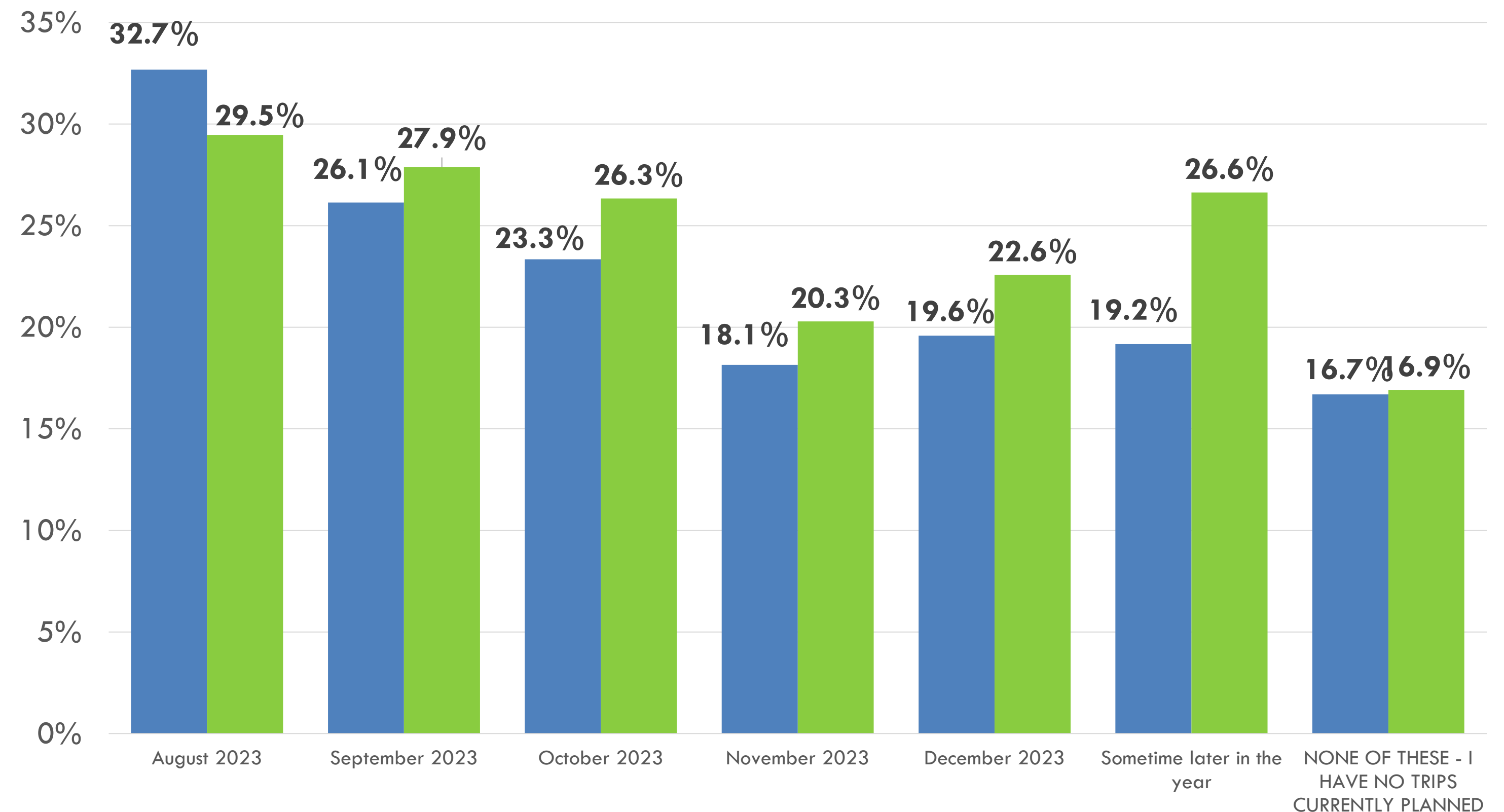
MONTHS OF EXPECTED LEISURE TRIPS IN 2023

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



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KEY FINDINGS



Despite traveler concerns about the economy and high prices, summer travel volume is robust.

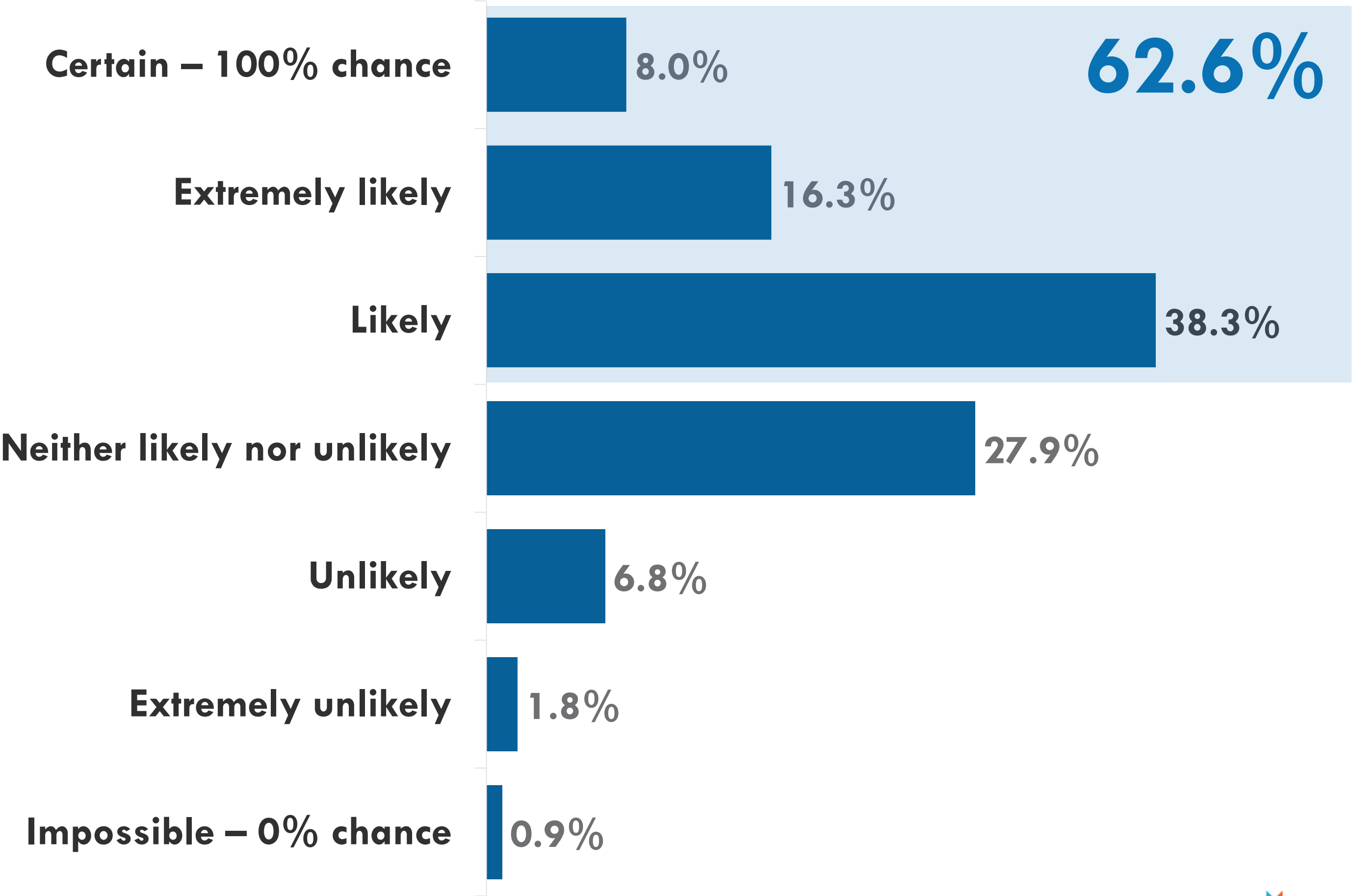
- 45% of travelers took an overnight trip in the past month, far exceeding last year's 39%
- Fully 54% of travelers took a day trip in the past month. One year ago, this stood at 36%.

A photograph taken from an airplane window, showing the wing of the aircraft extending into a clear blue sky. Below the wing, a thick layer of white clouds is visible. The word "Travel" is written in a white, cursive script across the center of the image.

Travel

PRICE GOUGING WILL BECOME MORE COMMON IN THE TRAVEL INDUSTRY

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

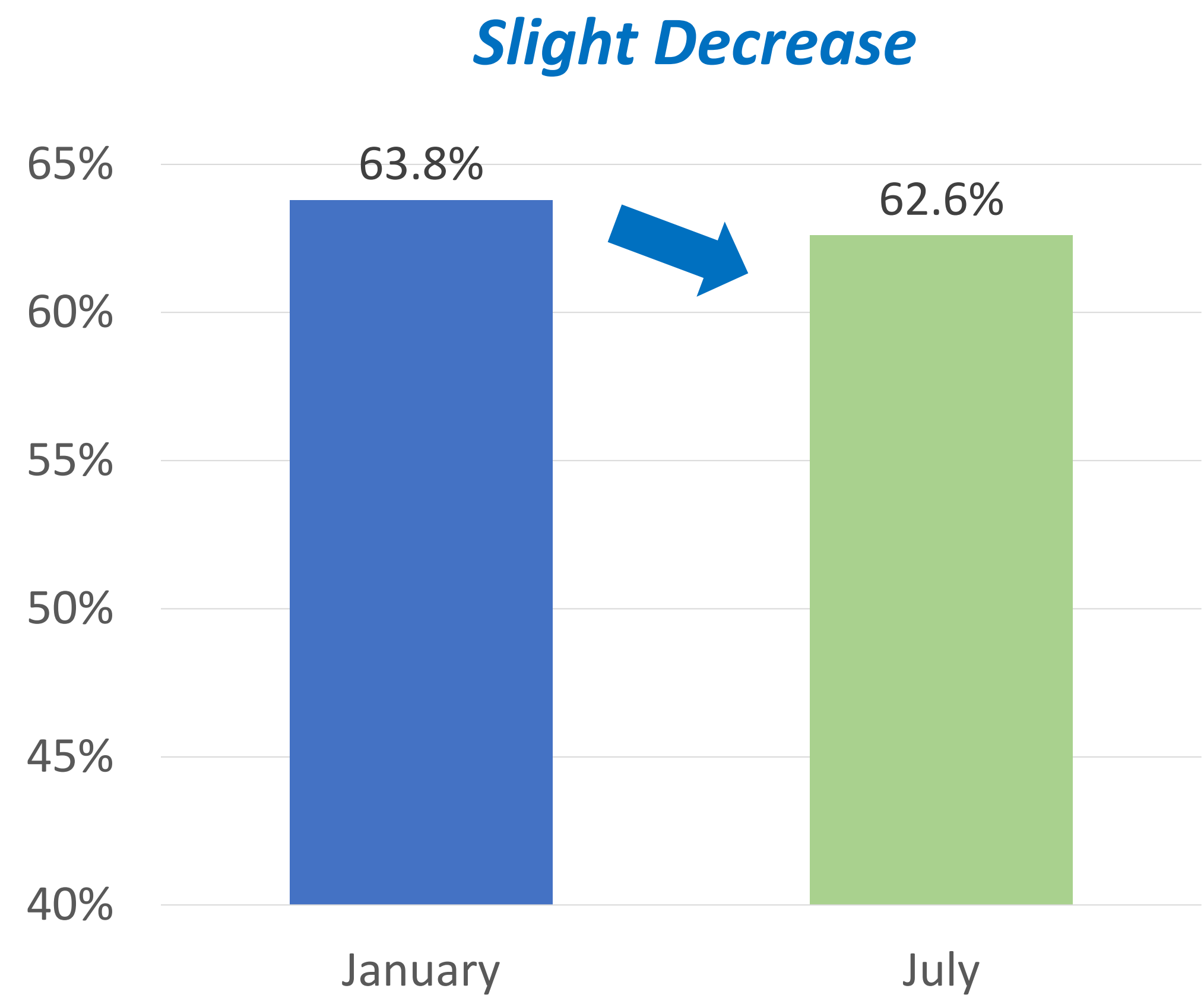


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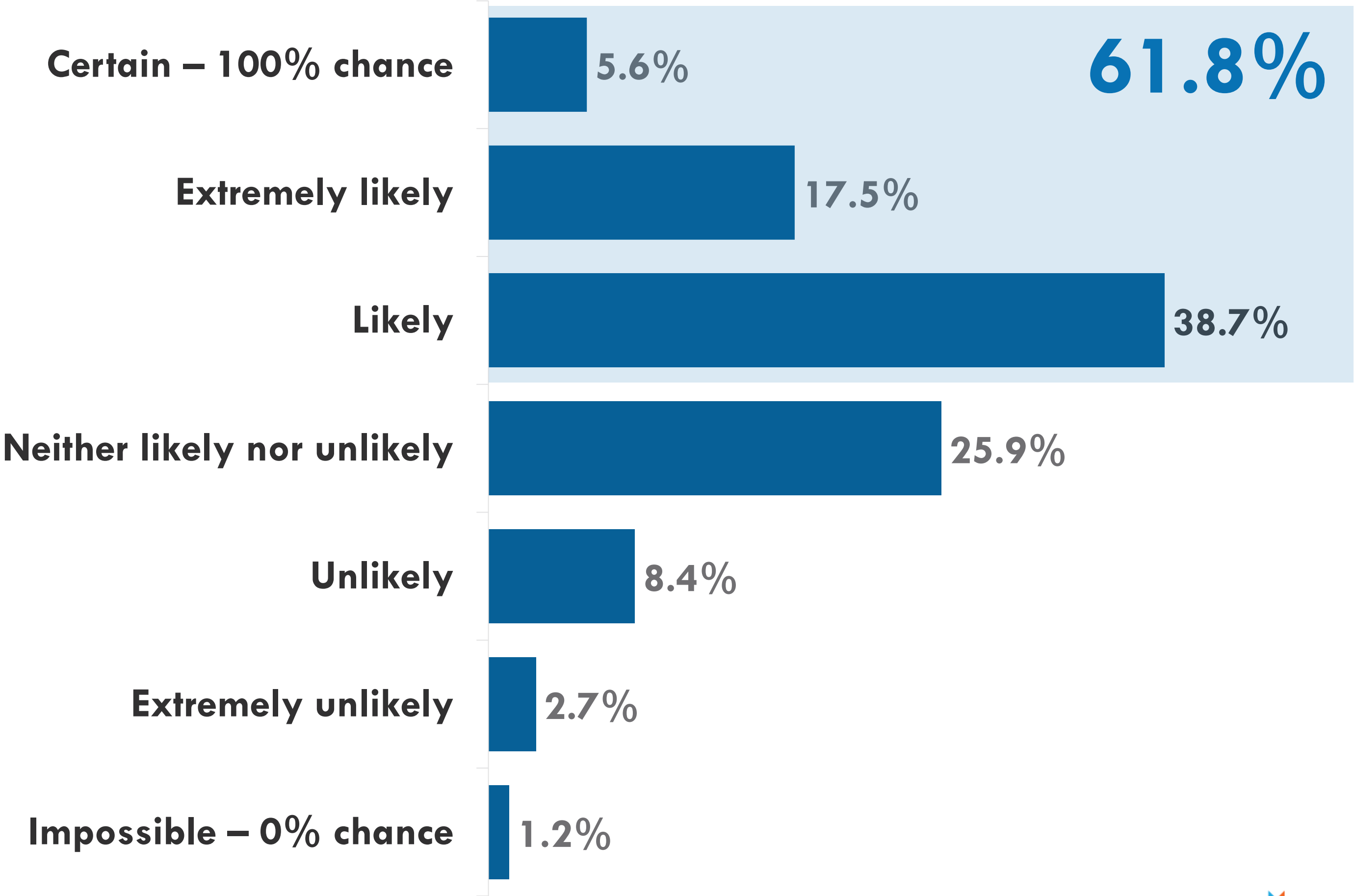
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Top 3 Box Score: Certain, Extremely Likely or Likely

LABOR SHORTAGES WILL BE A PROBLEM FOR THE TRAVEL INDUSTRY

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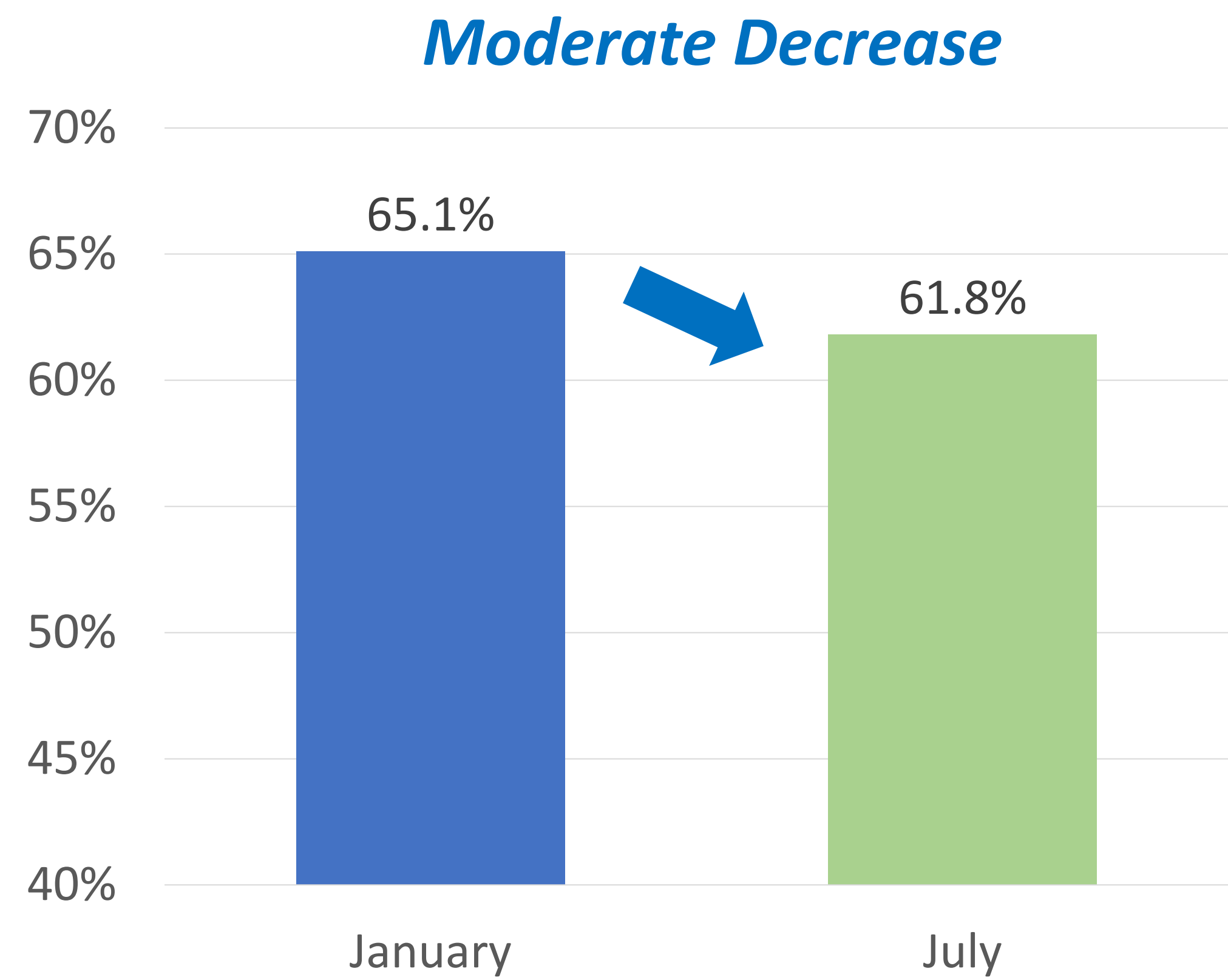


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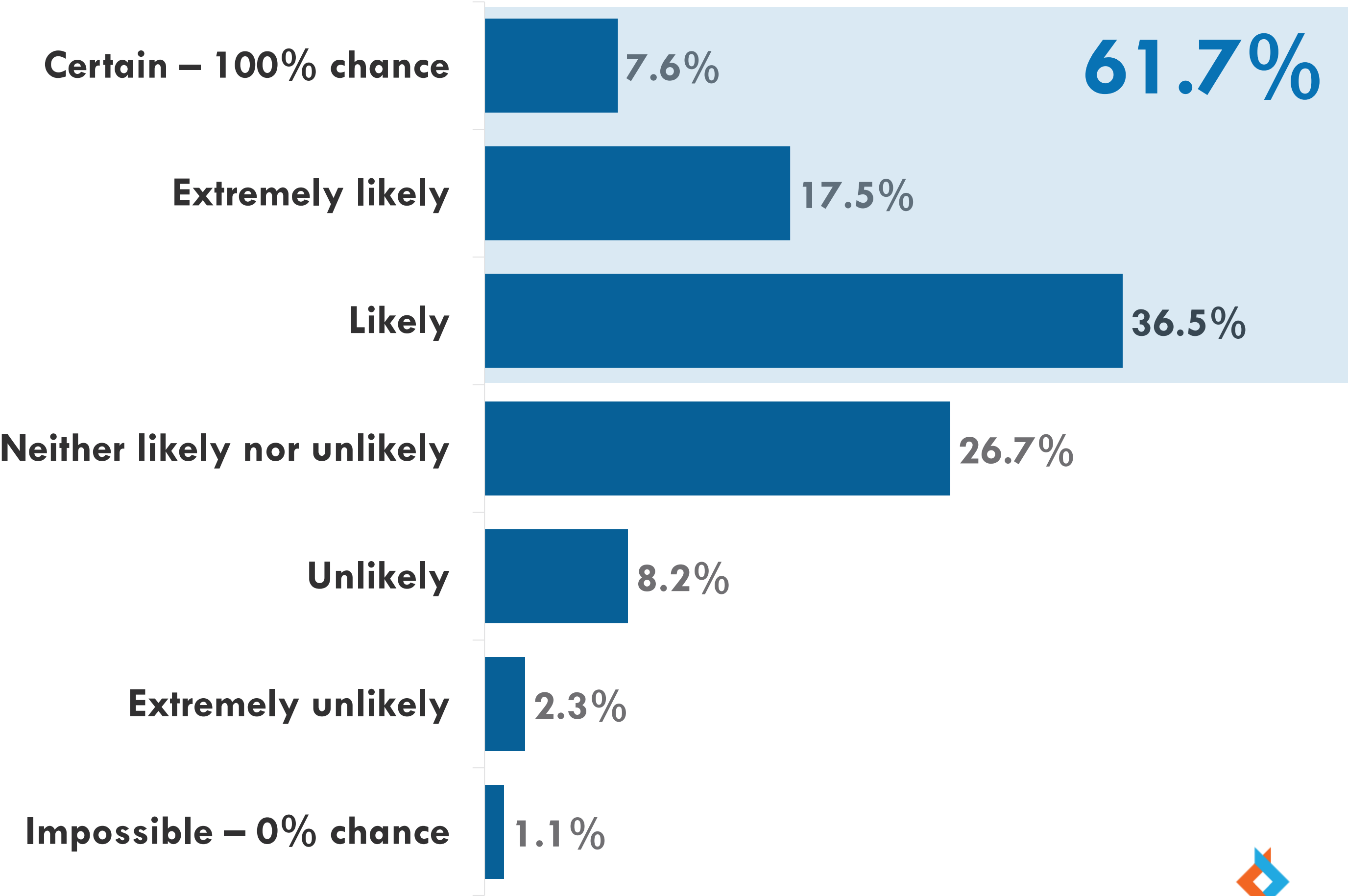


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DOMESTIC TRAVEL WILL BECOME GENERALLY MORE FRUSTRATING

(E.G., OVER-CROWDING, AIR TRAVEL BREAKDOWNS, POOR CUSTOMER SERVICE, ETC.)

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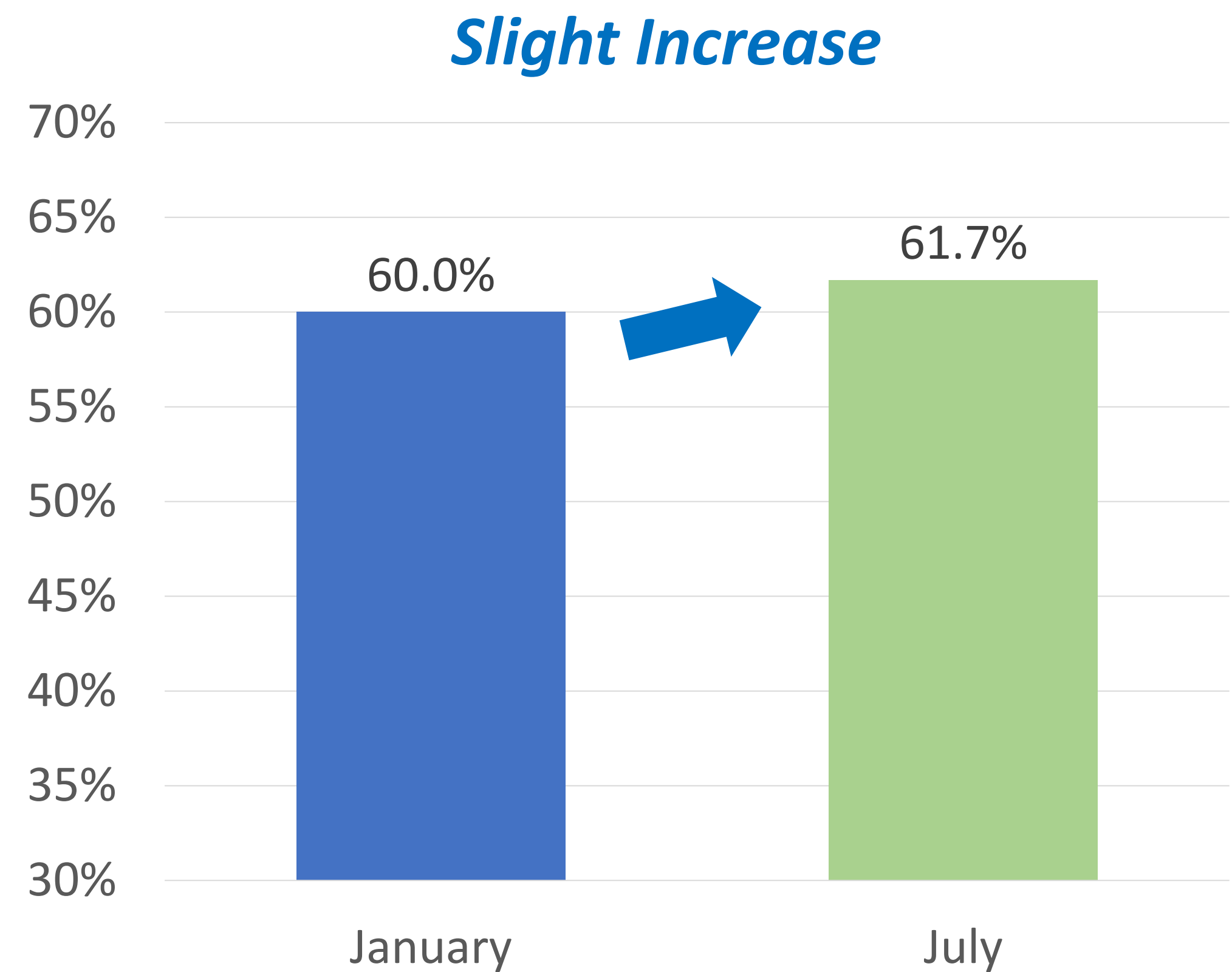
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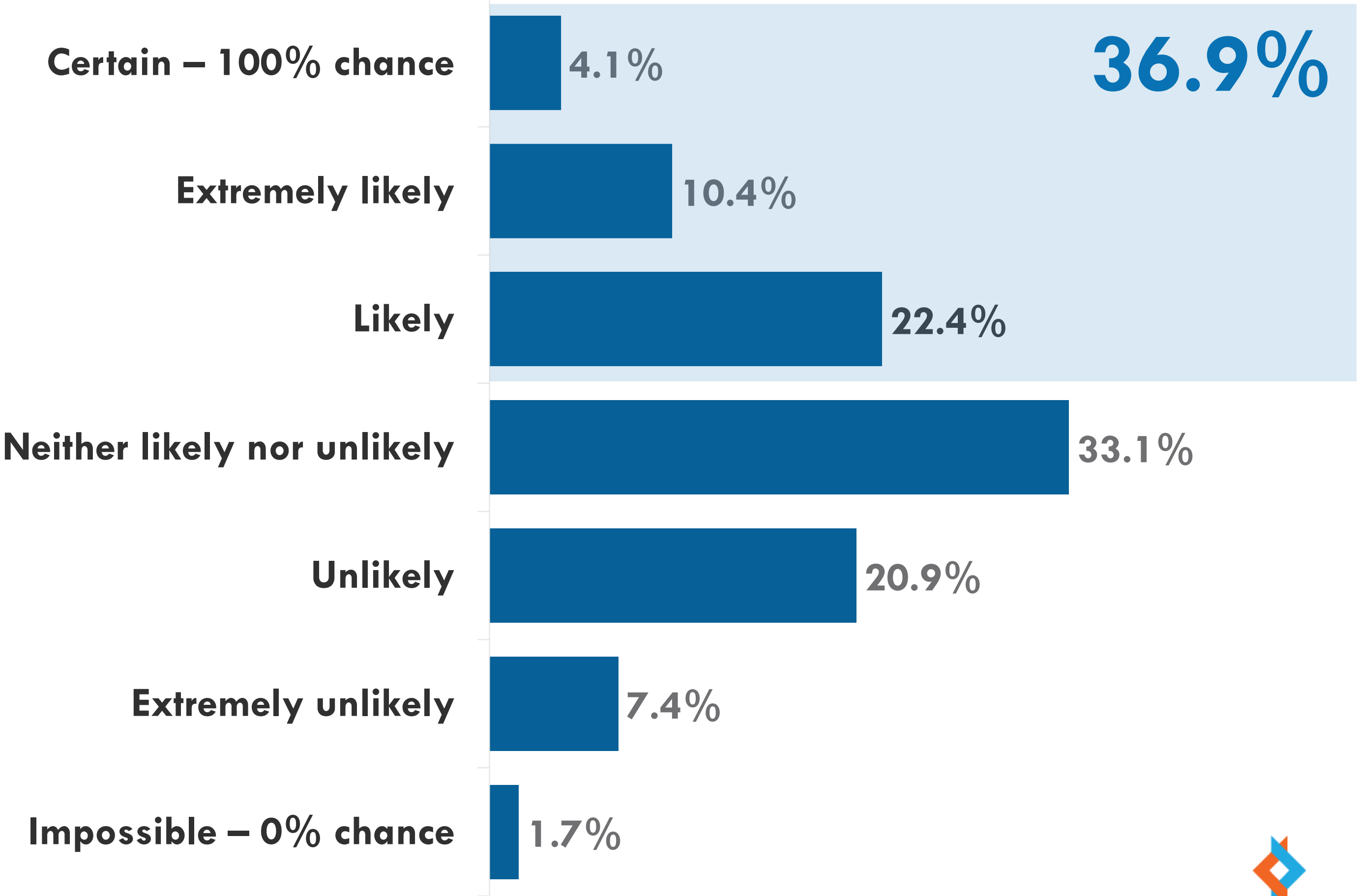
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TRAVELERS WILL SOUR ON THE USE OF HOME RENTAL SERVICES LIKE AIRBNB, VRBO, ETC.

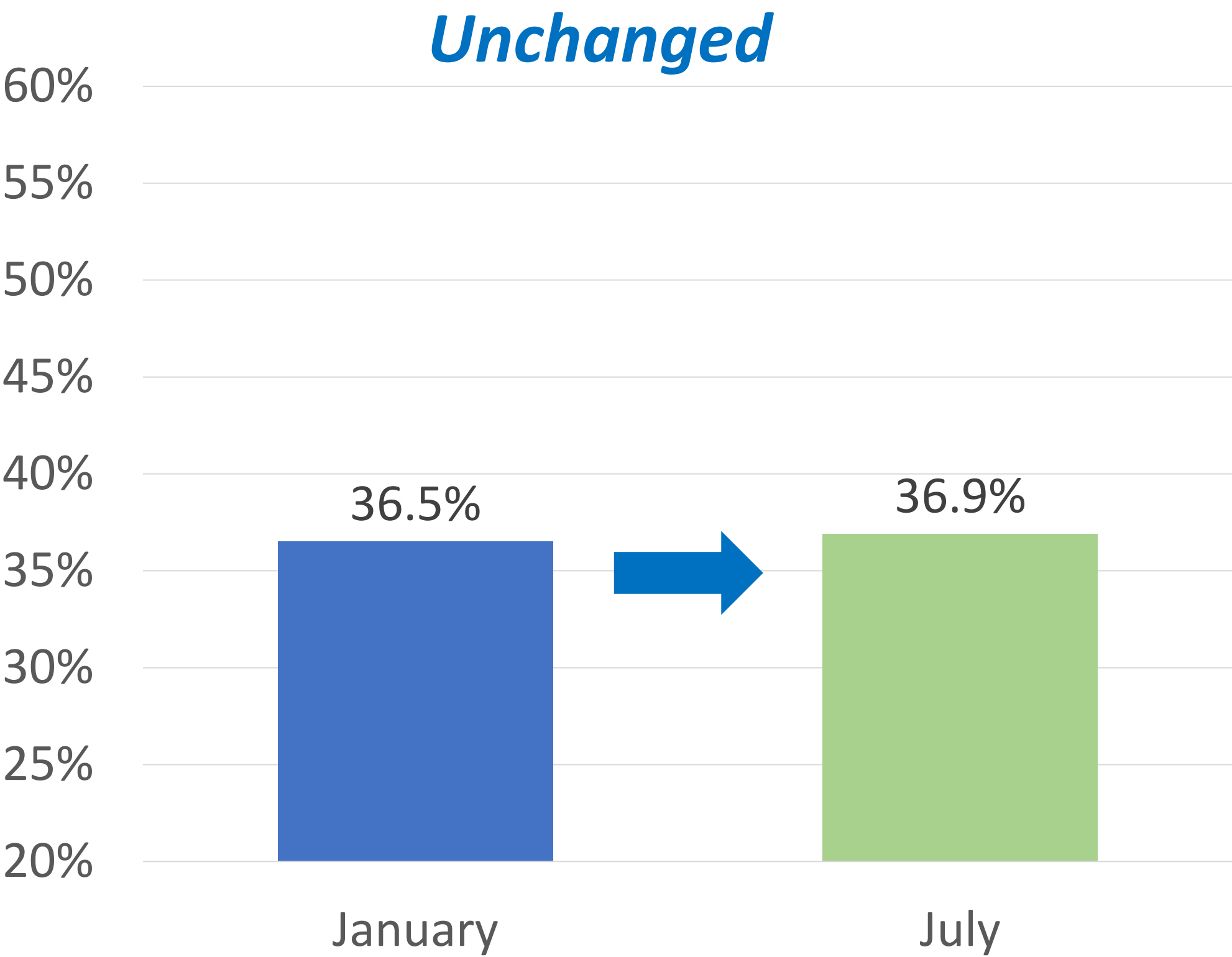
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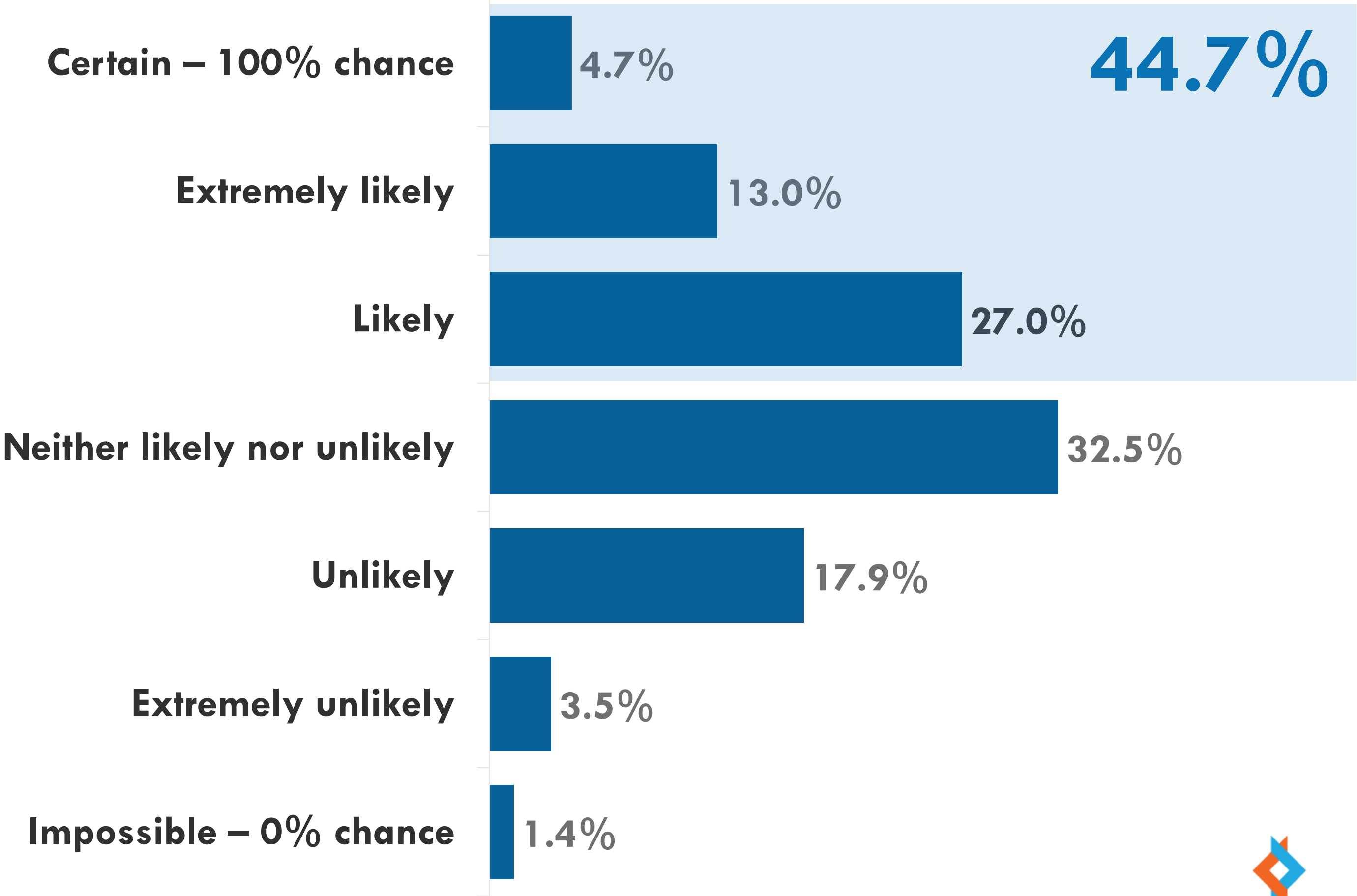


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POPULAR NATIONAL PARKS WILL BE OVER-RUN WITH TOURISTS

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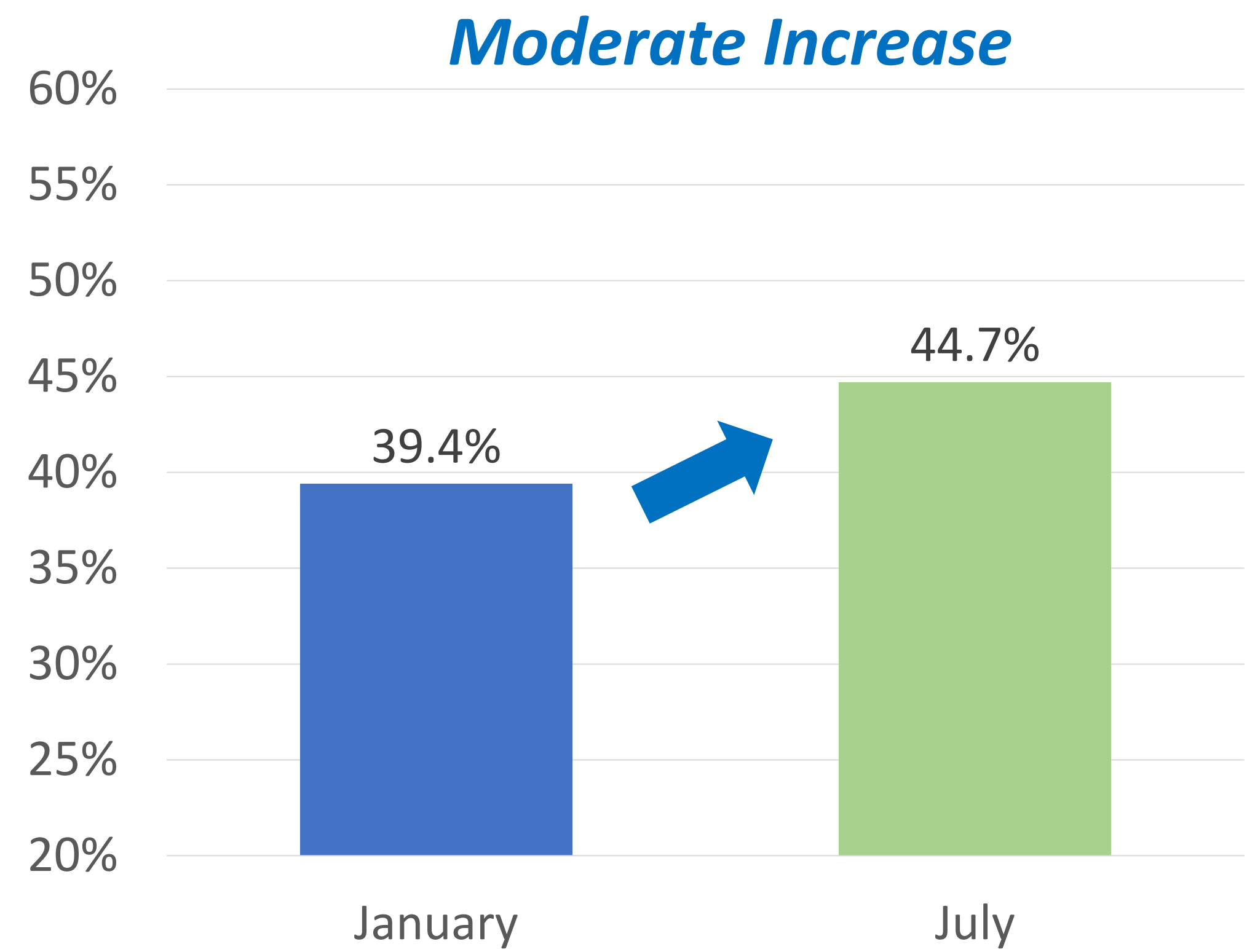


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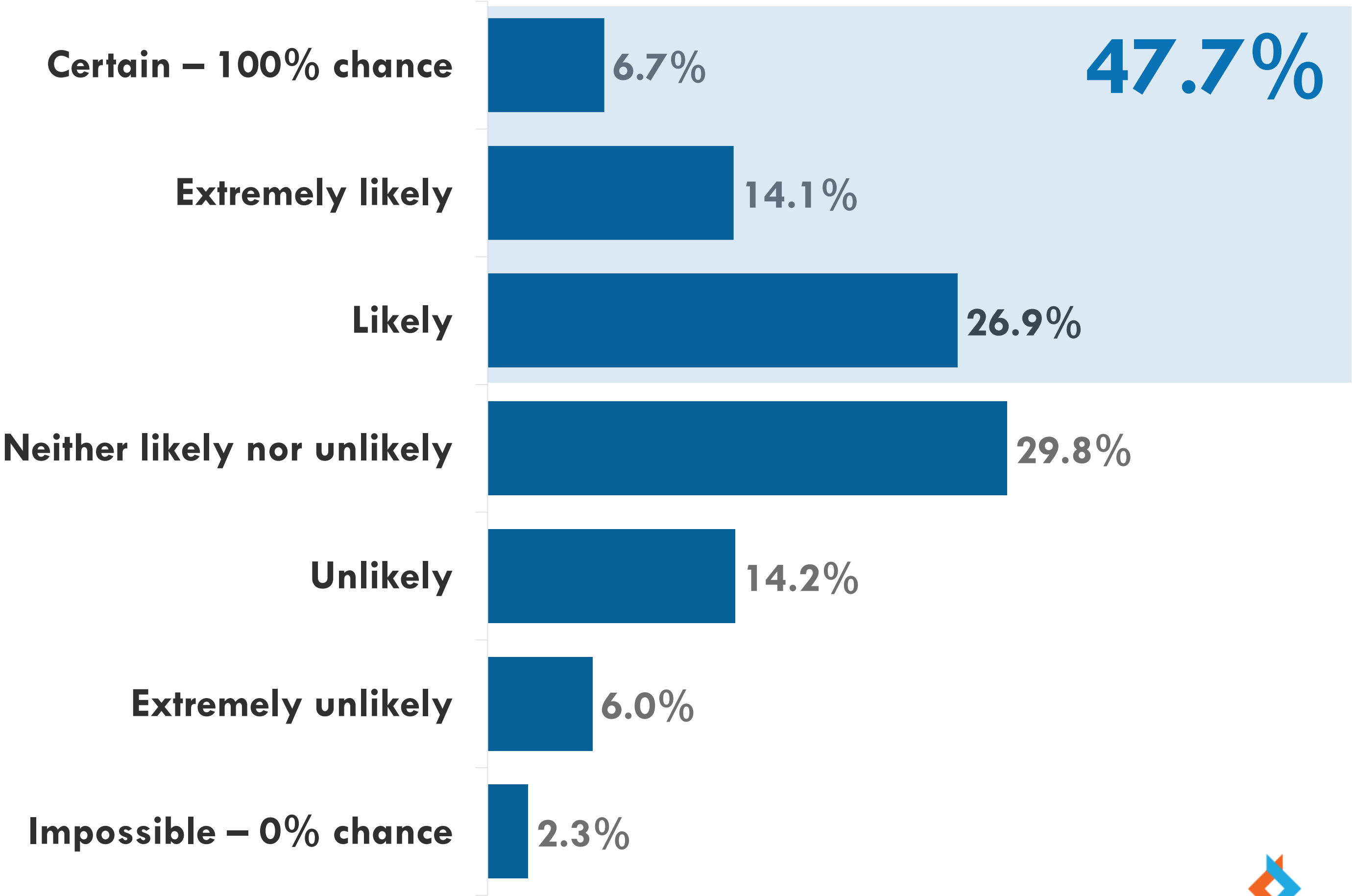
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AMERICAN CITIES WILL BECOME MORE DANGEROUS AND UNMANAGEABLE PLACES TO VISIT

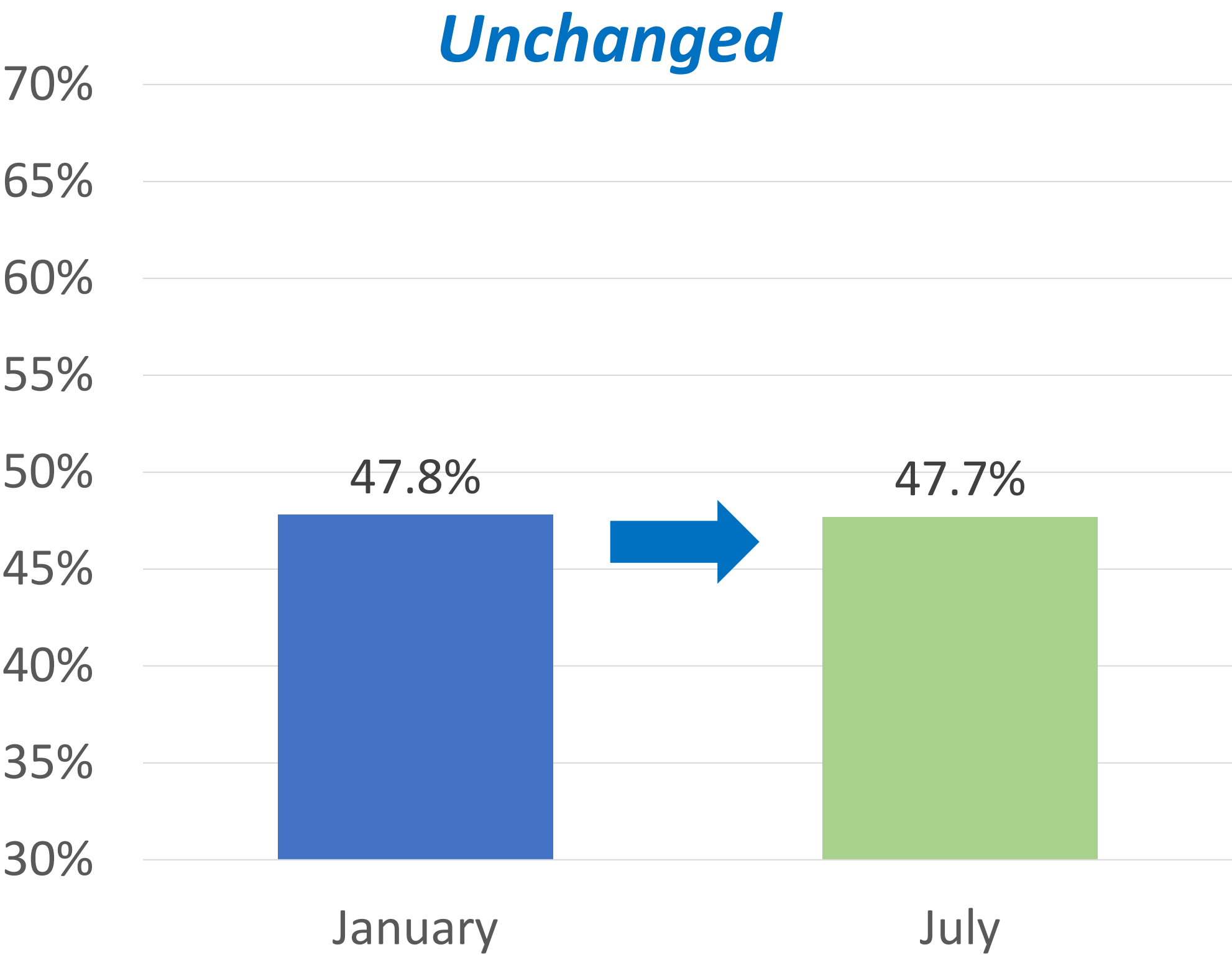
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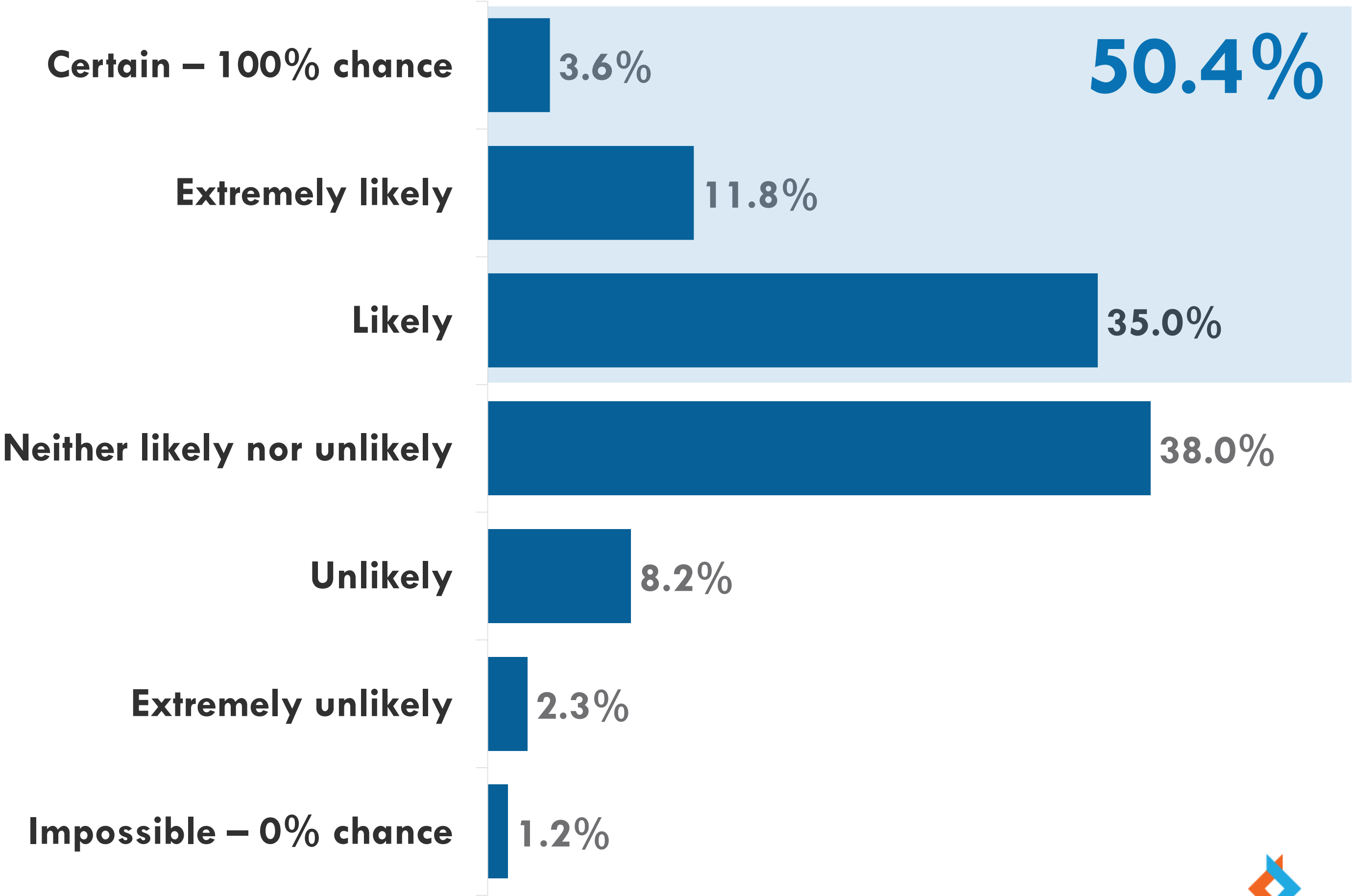


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MORE AUTHENTIC, LESS COMMERCIAL TRAVEL EXPERIENCES WILL GROW IN POPULARITY

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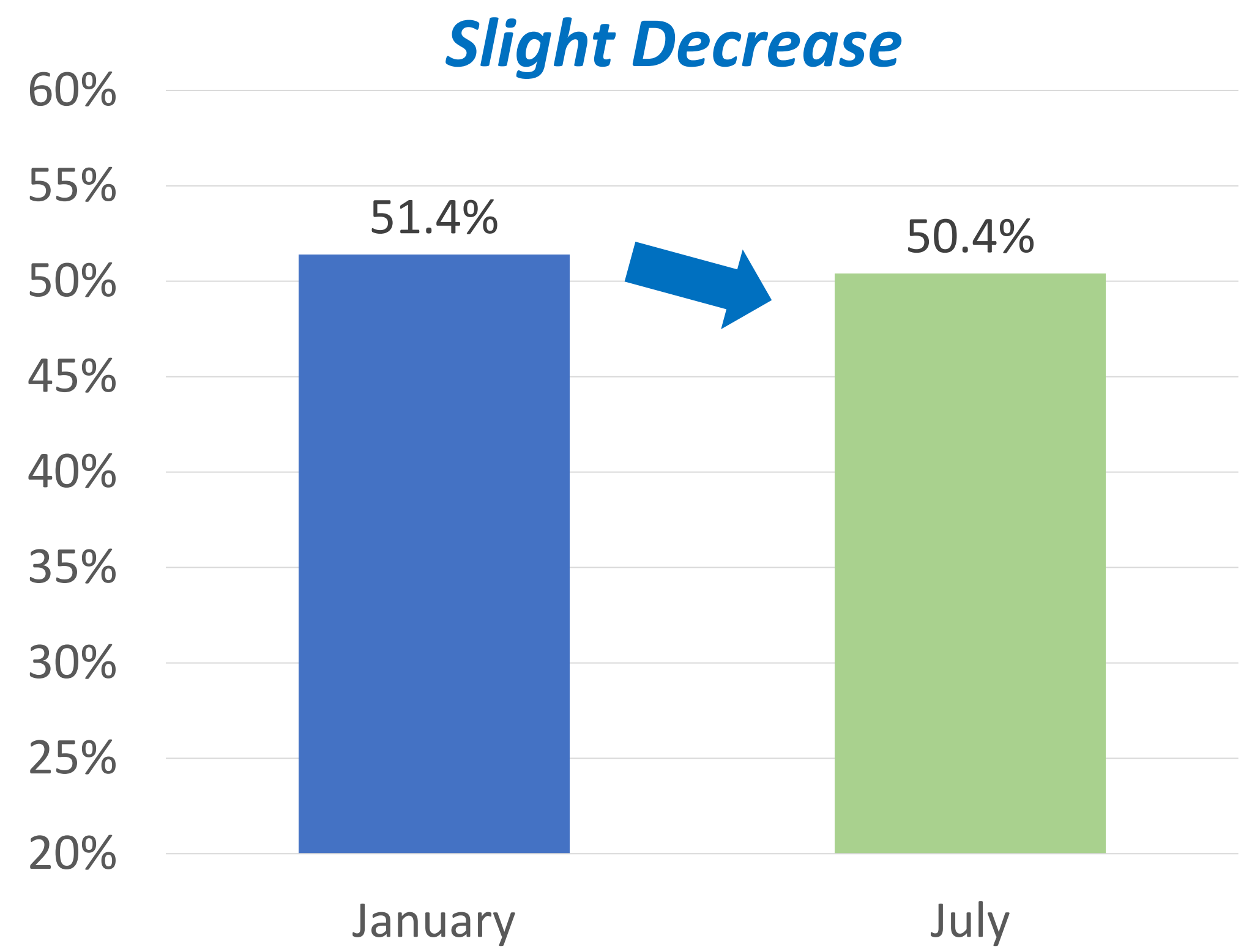


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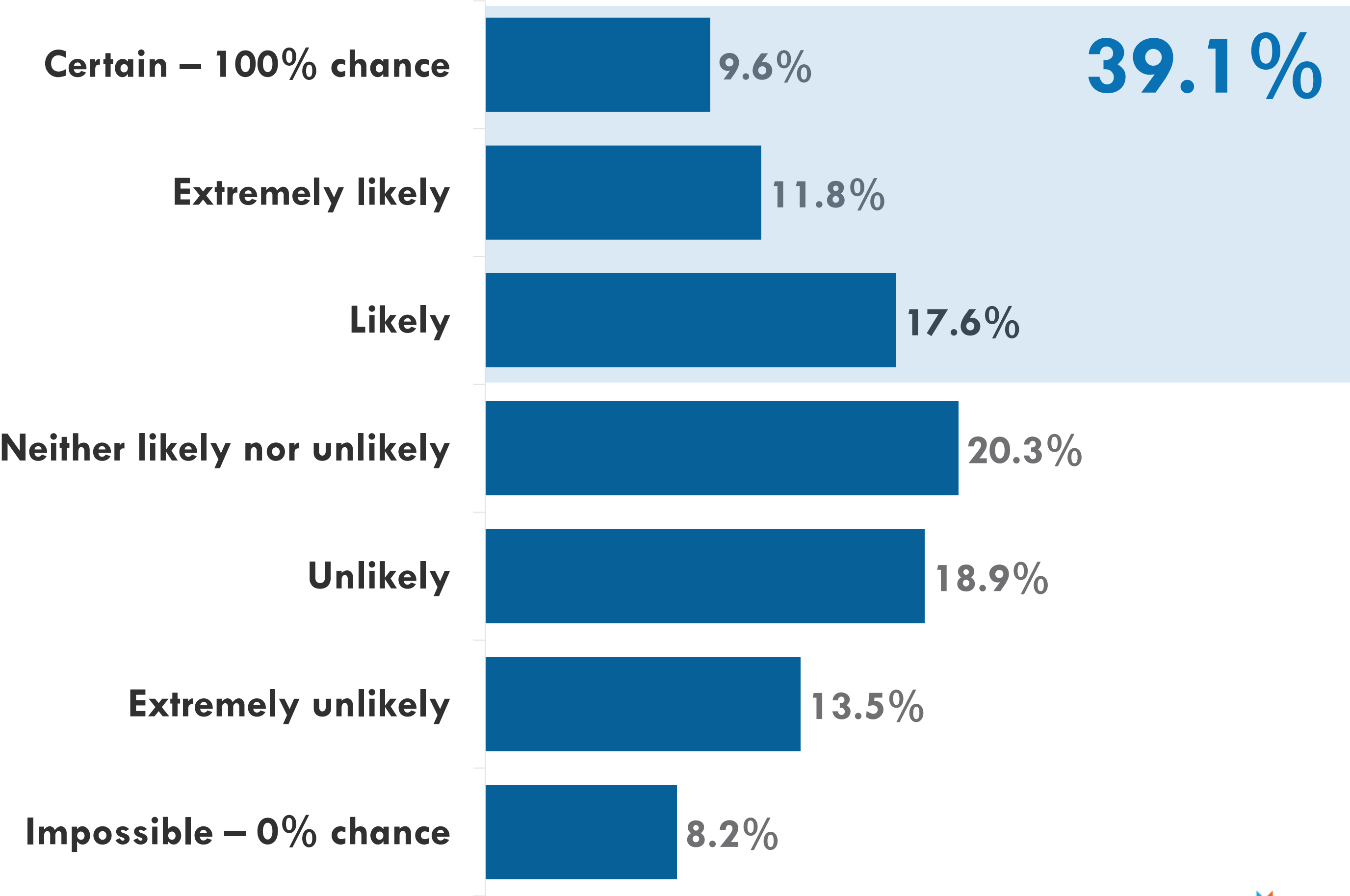
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I'LL TAKE A DREAM-TRIP TO SOMEWHERE EXCITING IN 2023

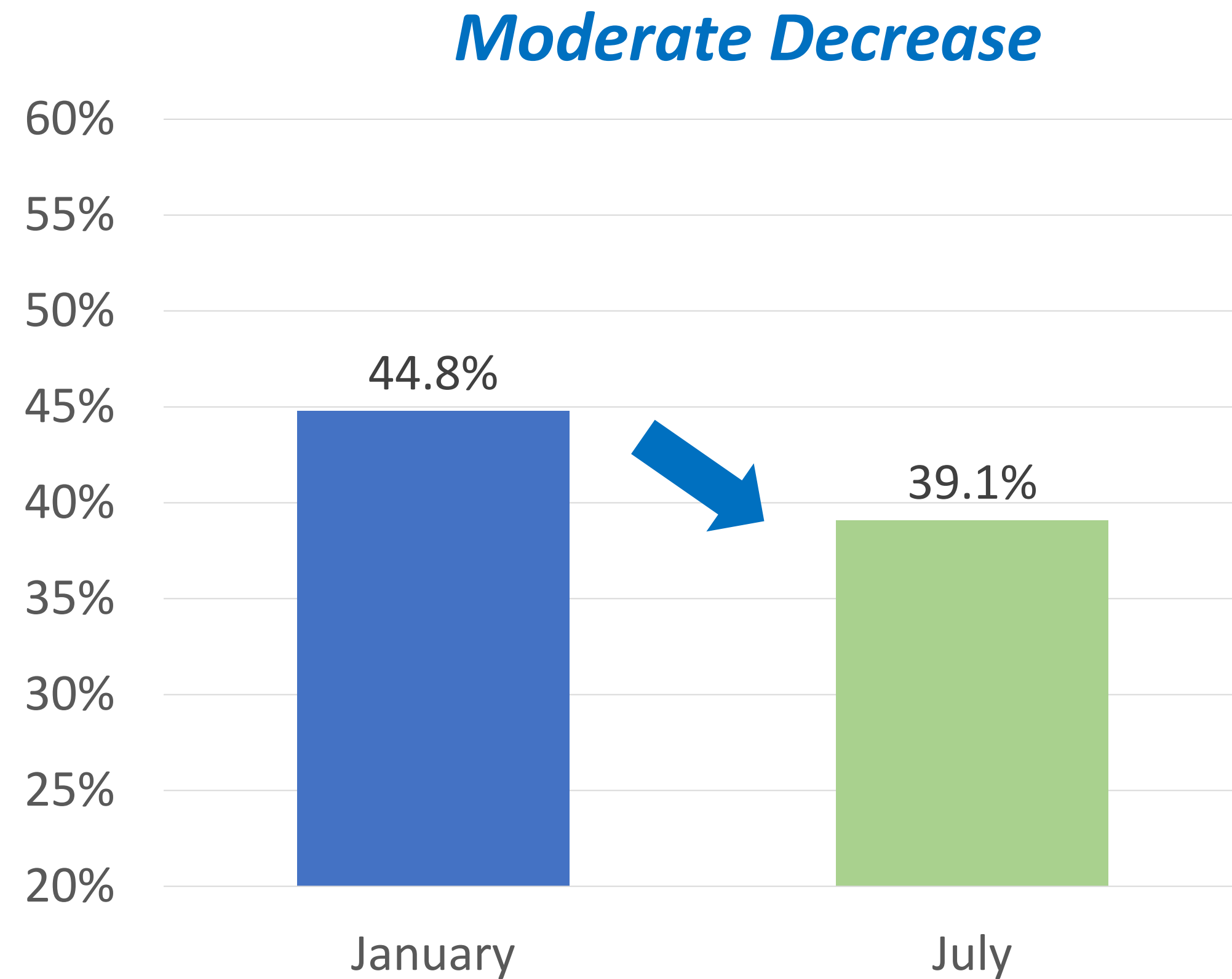
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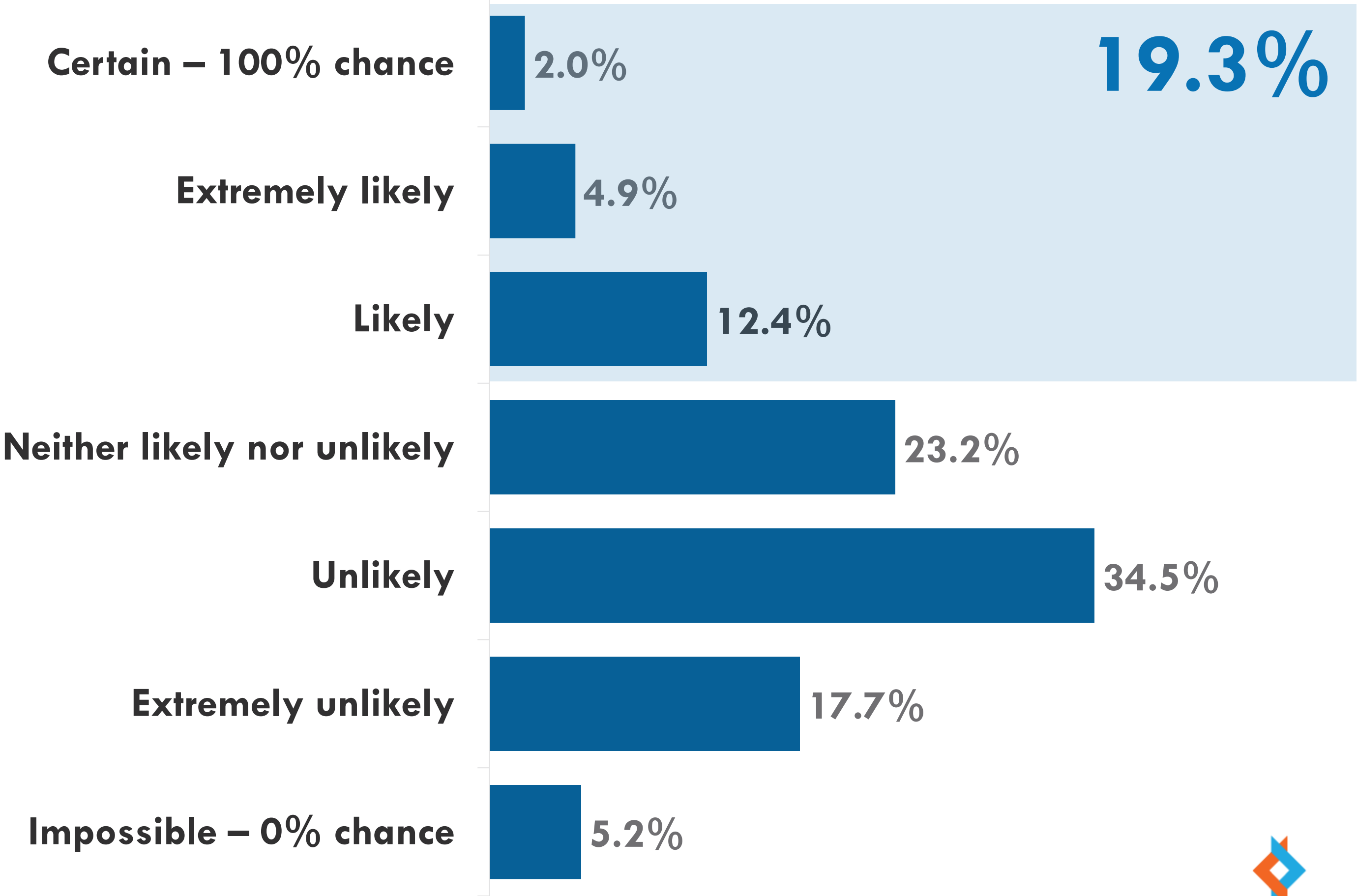
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The background of the image is a dark blue grid with various financial charts. On the left, there is a candlestick chart with red and green bars. In the center and right, there are line charts with peaks and valleys. Several numbers are scattered across the grid, including 63, 146, 135, 44, 587, 583, 236, 254, 409, 365, and 332. The word "Economy" is written in a large, white, cursive font across the middle of the image.

Economy

GASOLINE PRICES WILL FALL SIGNIFICANTLY DURING THE YEAR

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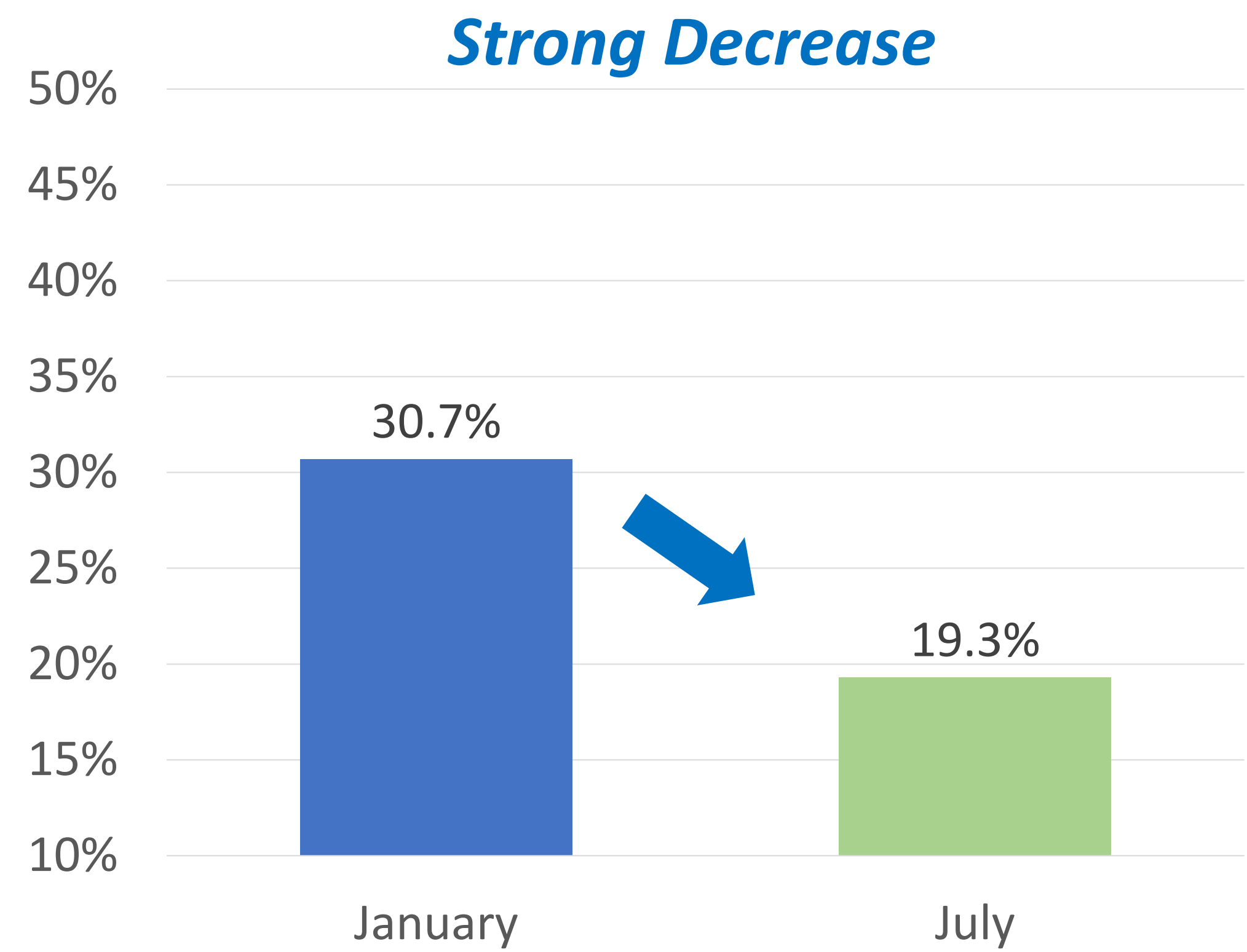


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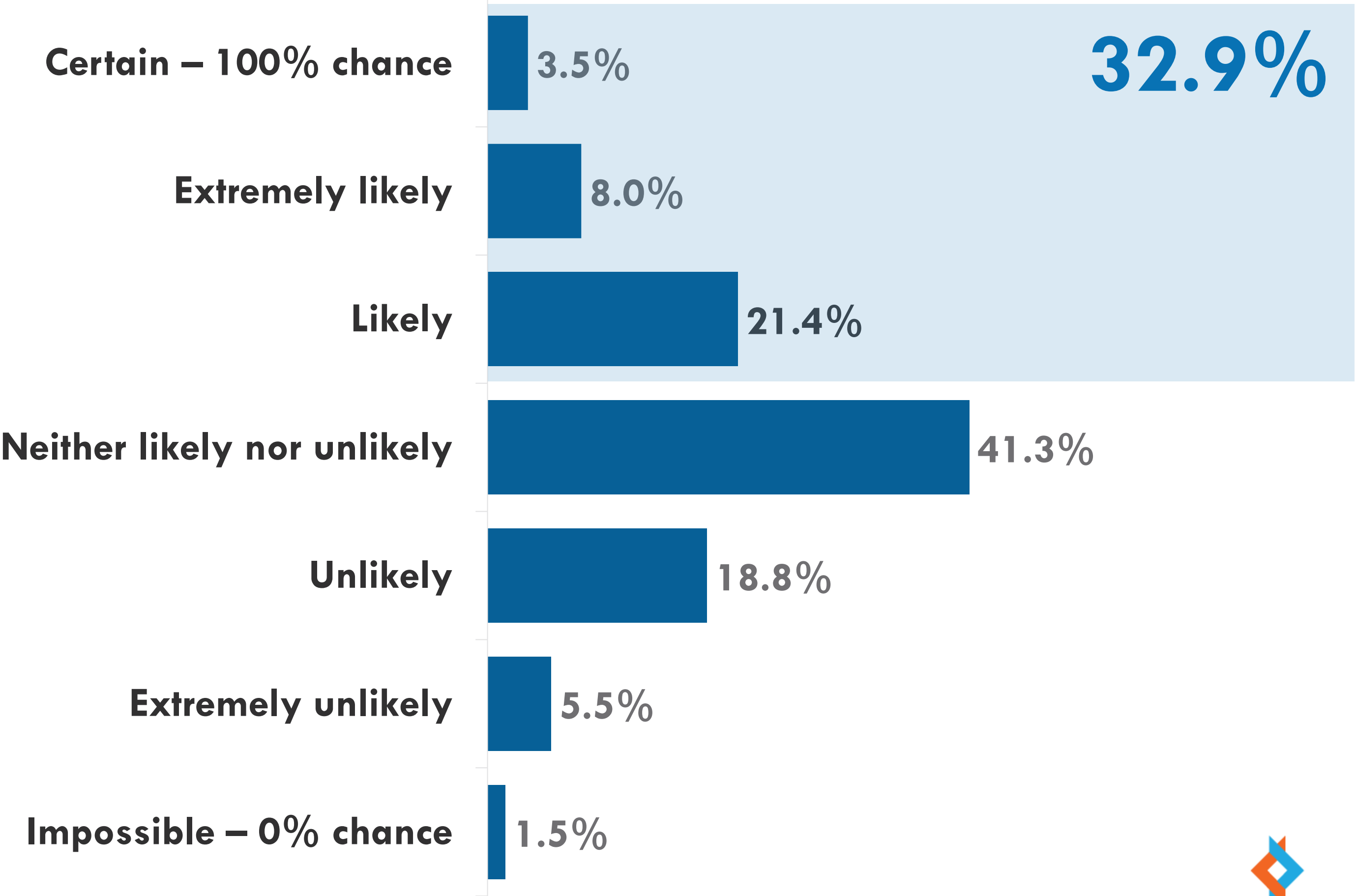
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Top 3 Box Score: Certain, Extremely Likely or Likely

THE US STOCK MARKET WILL ENTER A BULL MARKET (I.E., STOCK PRICES WILL RISE STRONGLY)

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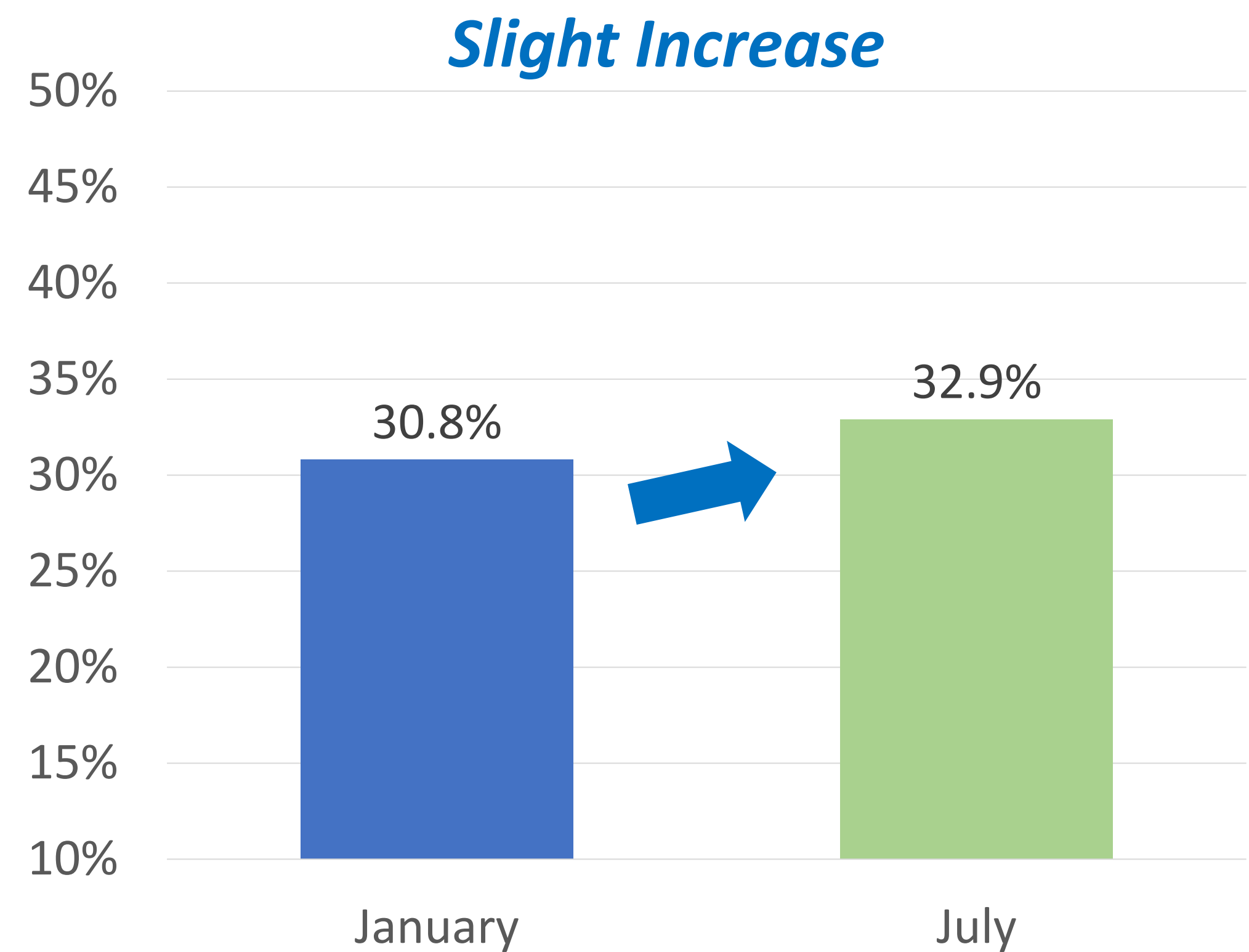


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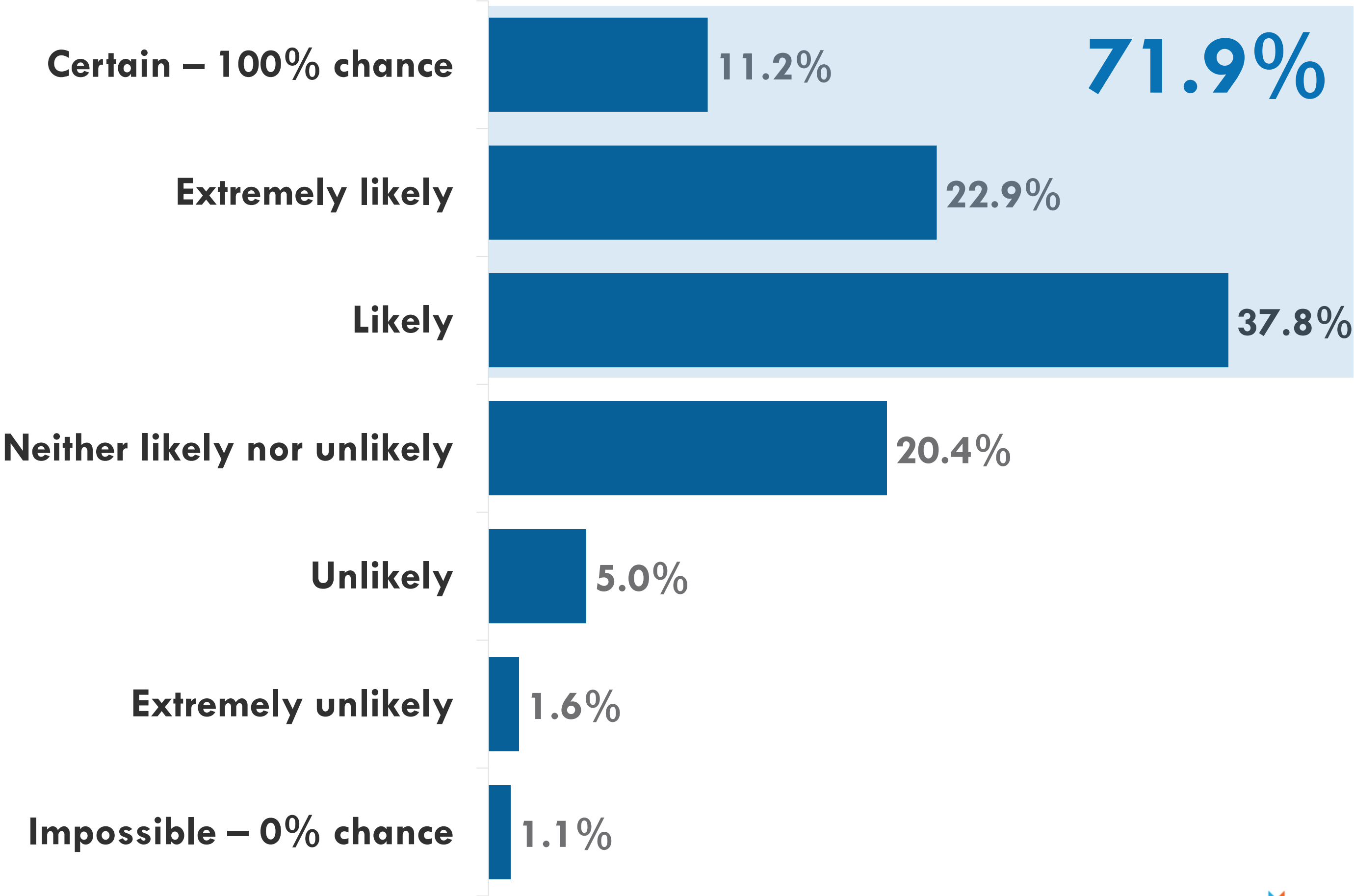
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An aerial photograph of a mountain range. The foreground shows a rocky ridge with patches of green vegetation. The background features more distant, hazy mountain peaks. The word "Environmental" is written in a white, cursive script across the middle of the image.

Environmental

WILDFIRES WILL BE A PROBLEM IN THE WESTERN USA

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

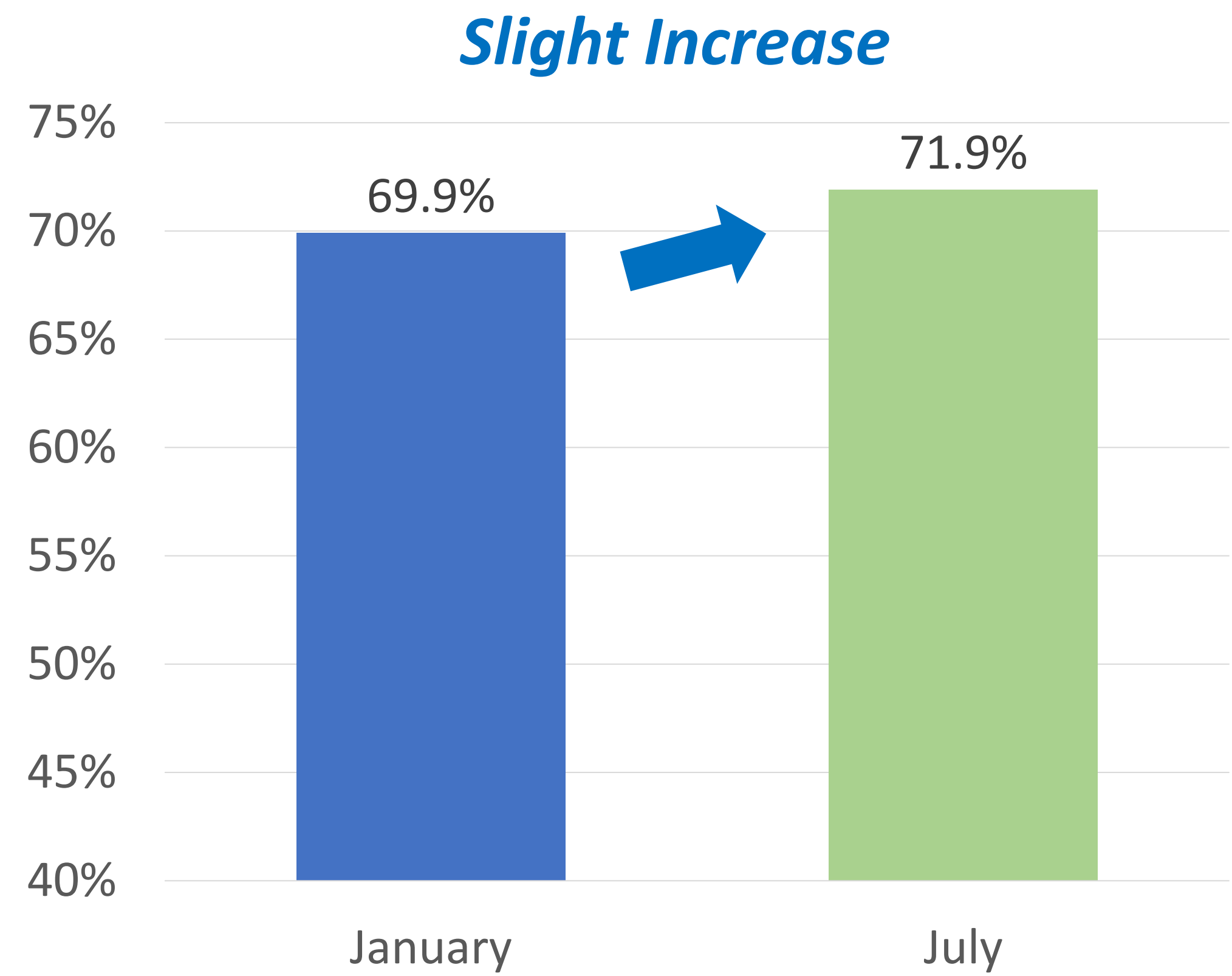


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

WILDFIRES WILL BE A PROBLEM IN THE WESTERN USA

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

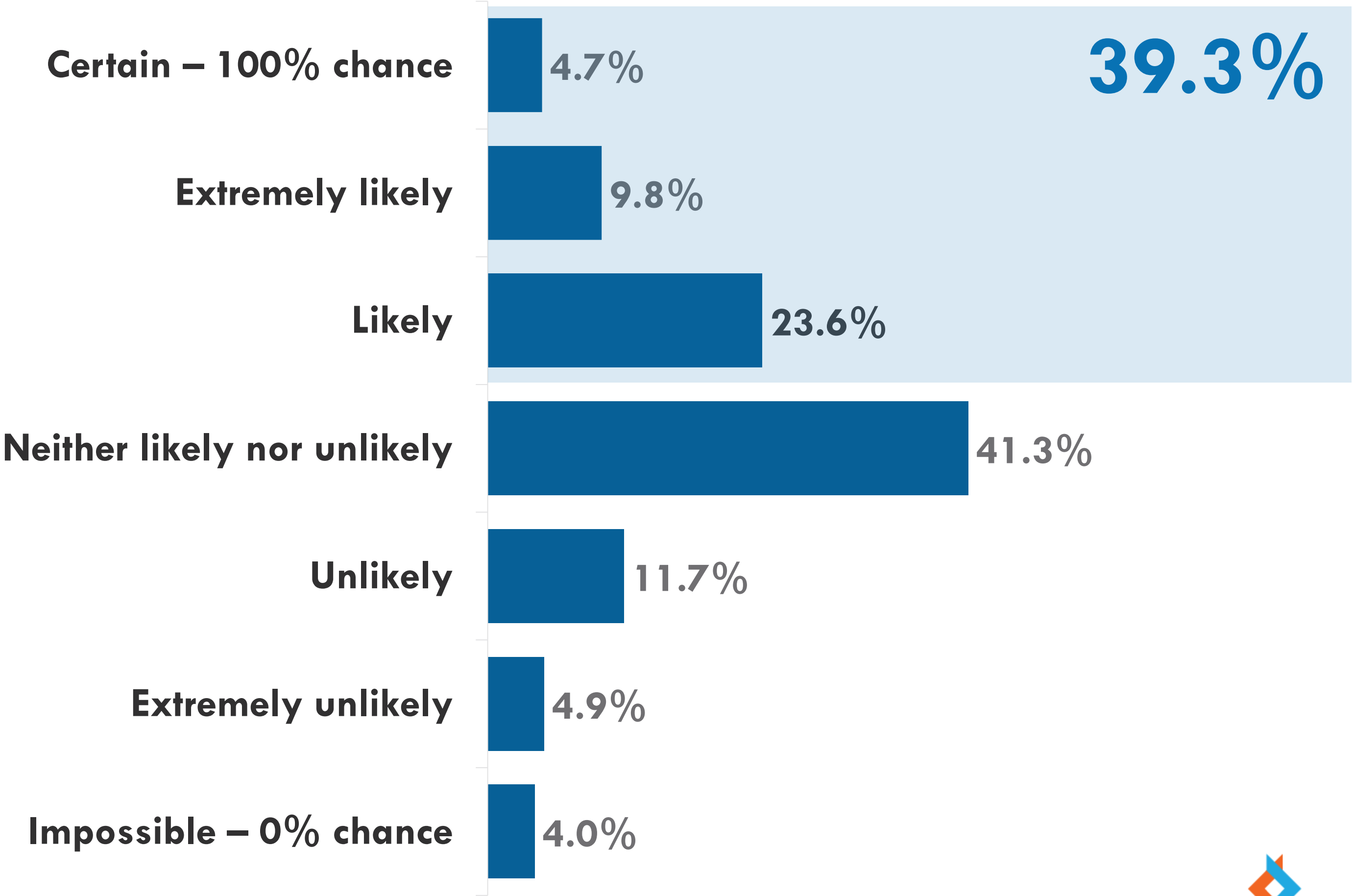
(Base: All respondents, 4,017 completed surveys. Data collected November 15-25, 2022.)



Top 3 Box Score: Certain, Extremely Likely or Likely

I'LL BE MORE PROACTIVE IN REDUCING THE IMPACT OF MY TRAVEL ON THE ENVIRONMENT

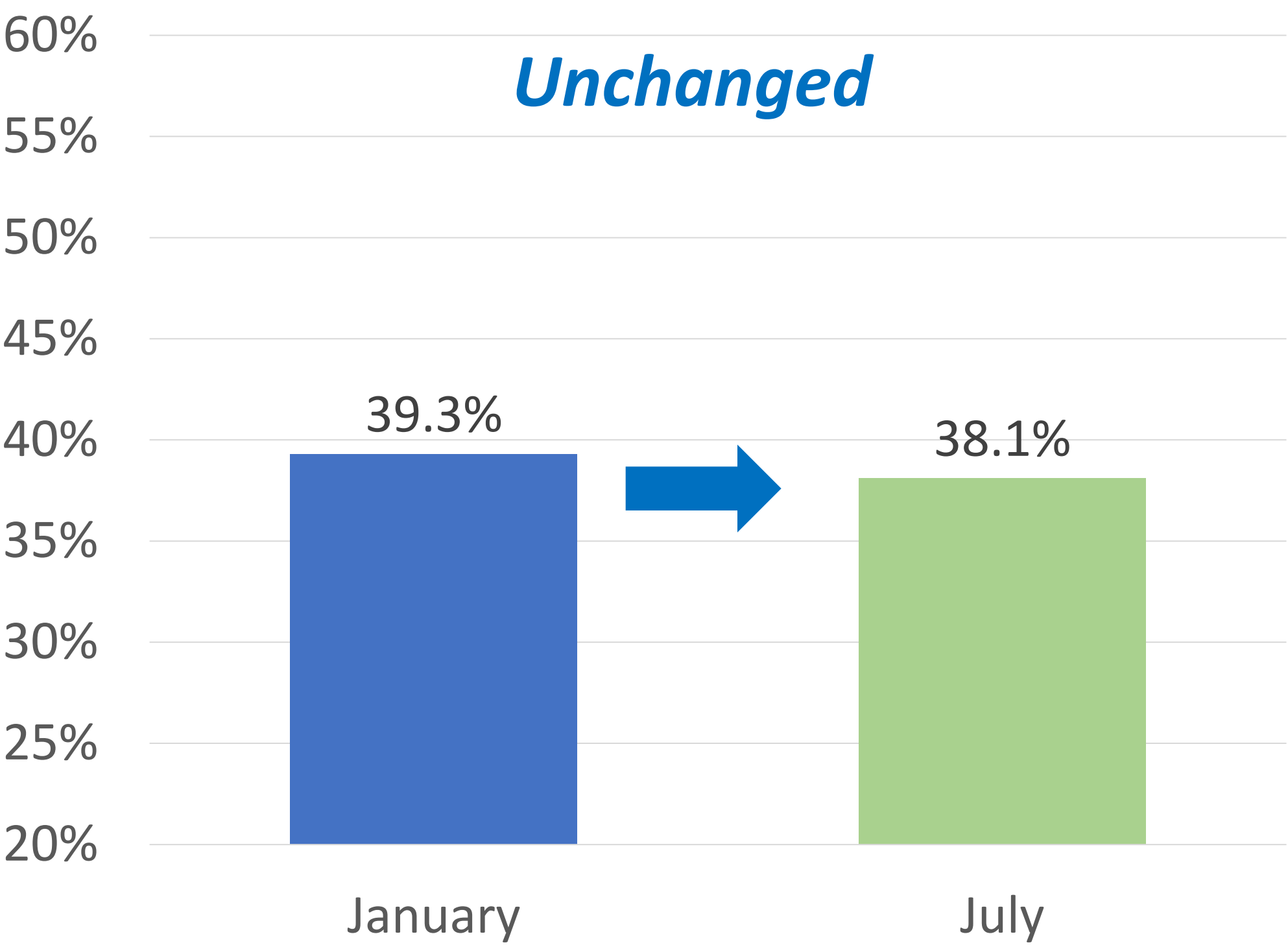
Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?



(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?



(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

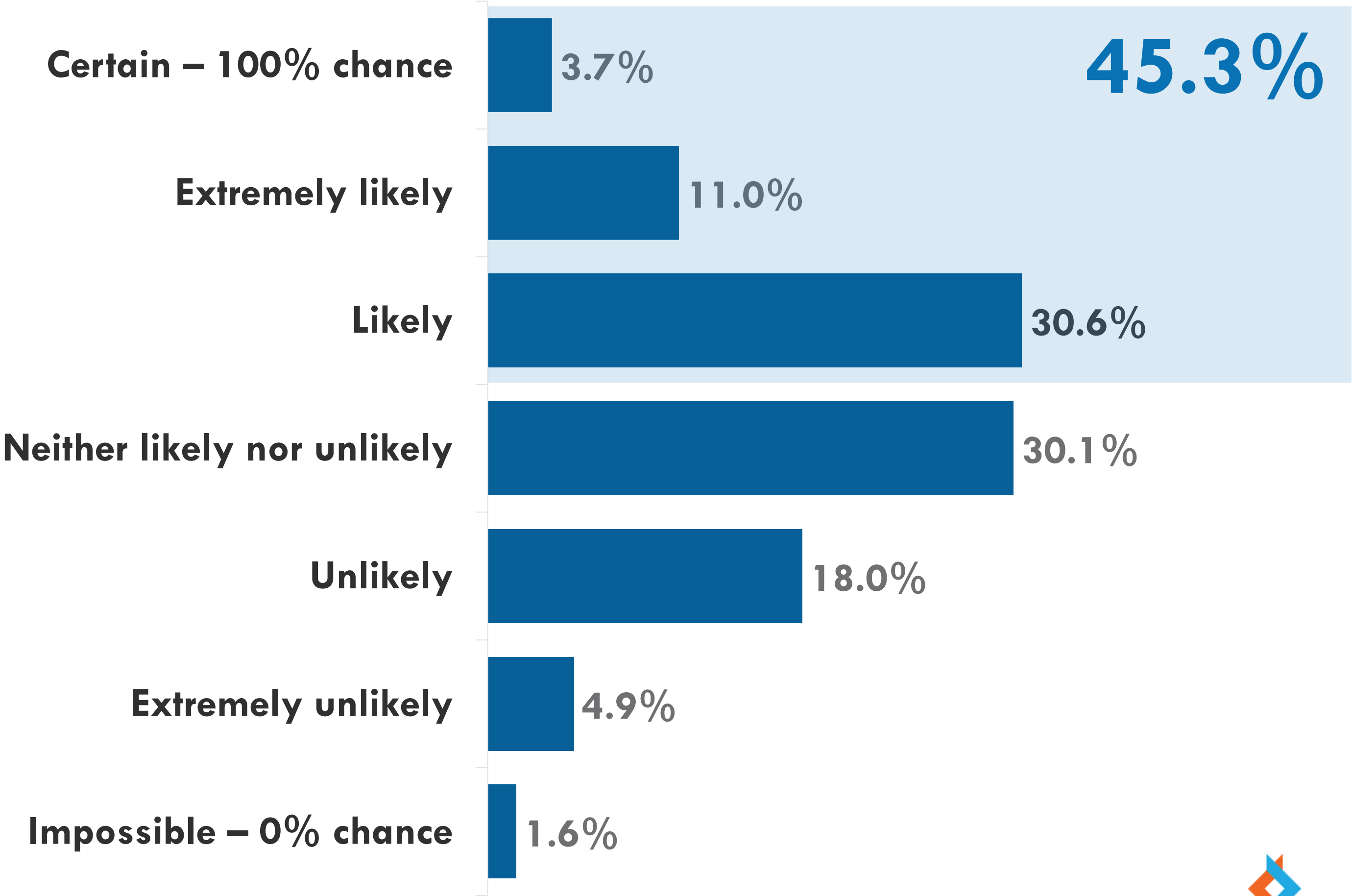
Top 3 Box Score: Certain, Extremely Likely or Likely

A photograph of a beach at sunset or sunrise. Numerous flags of various colors and designs are planted in the sand, creating a vibrant display. The sun is low on the horizon, casting a strong, warm glow and creating a lens flare effect. Several people are visible in the background, walking along the beach. The overall atmosphere is peaceful and celebratory.

Geopolitical

THE WAR BETWEEN UKRAINE AND RUSSIA WILL EXPAND INTO OTHER COUNTRIES

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

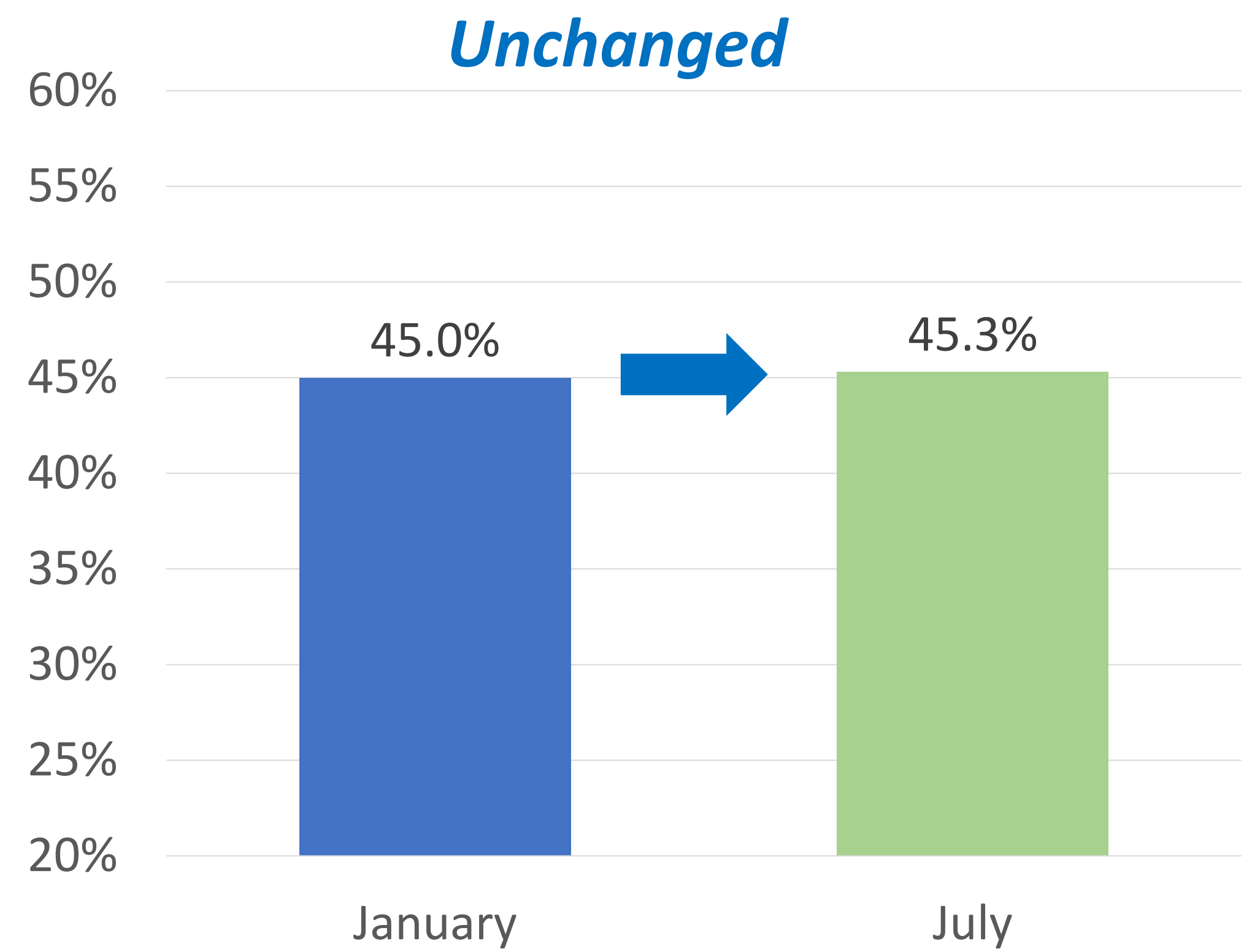


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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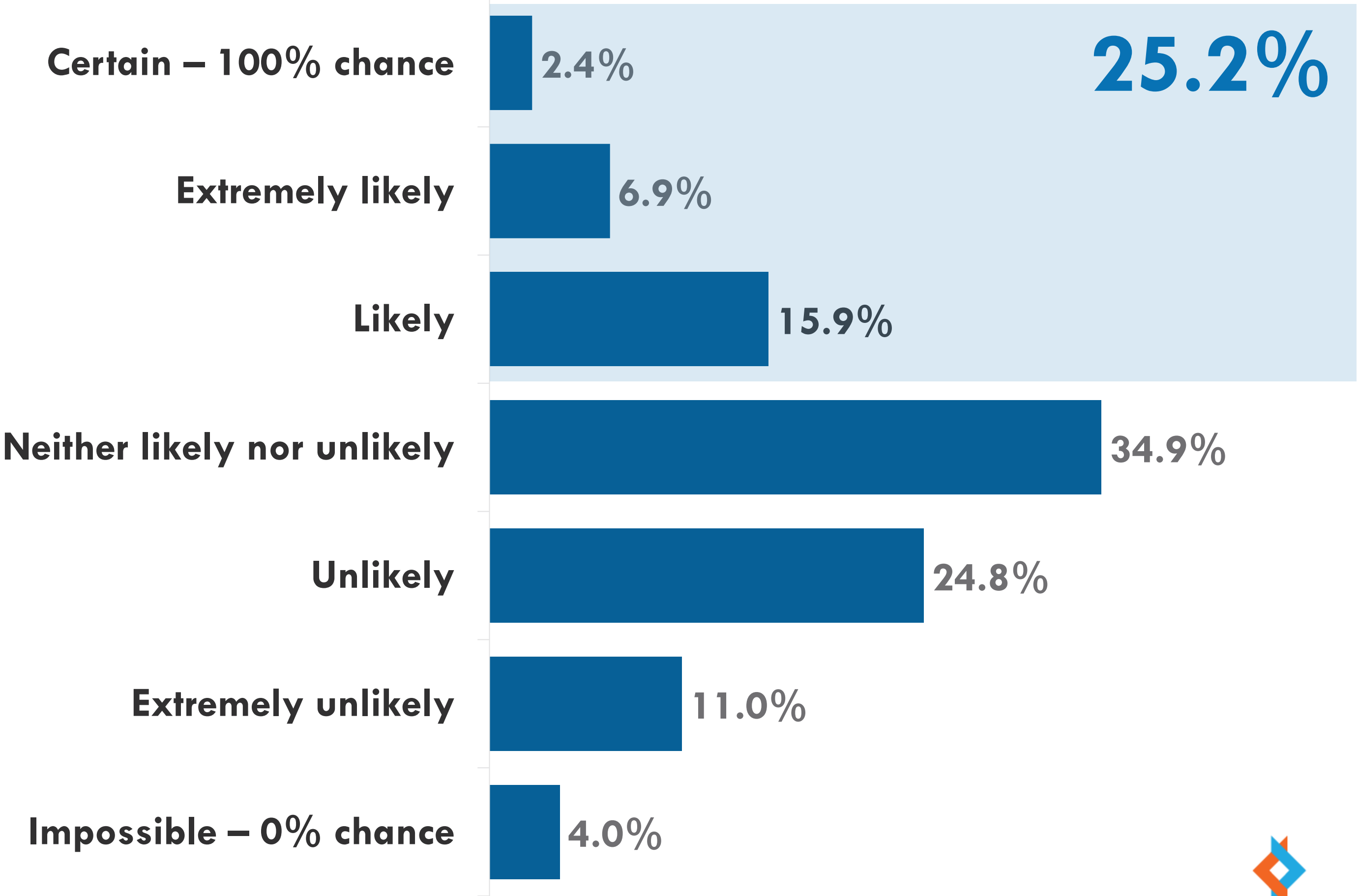
(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

AMERICA WILL BE PULLED INTO A WAR IN ASIA

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

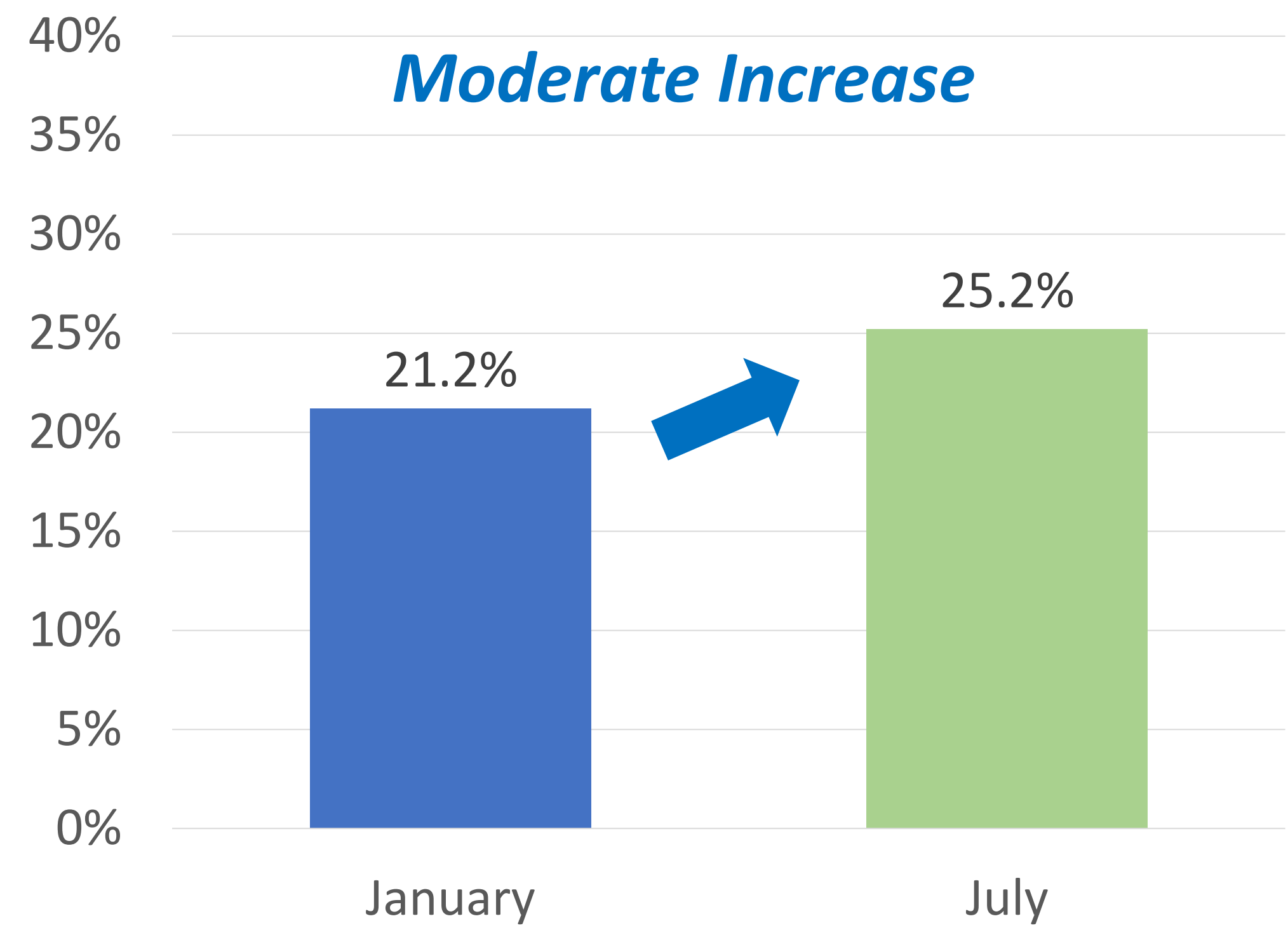


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

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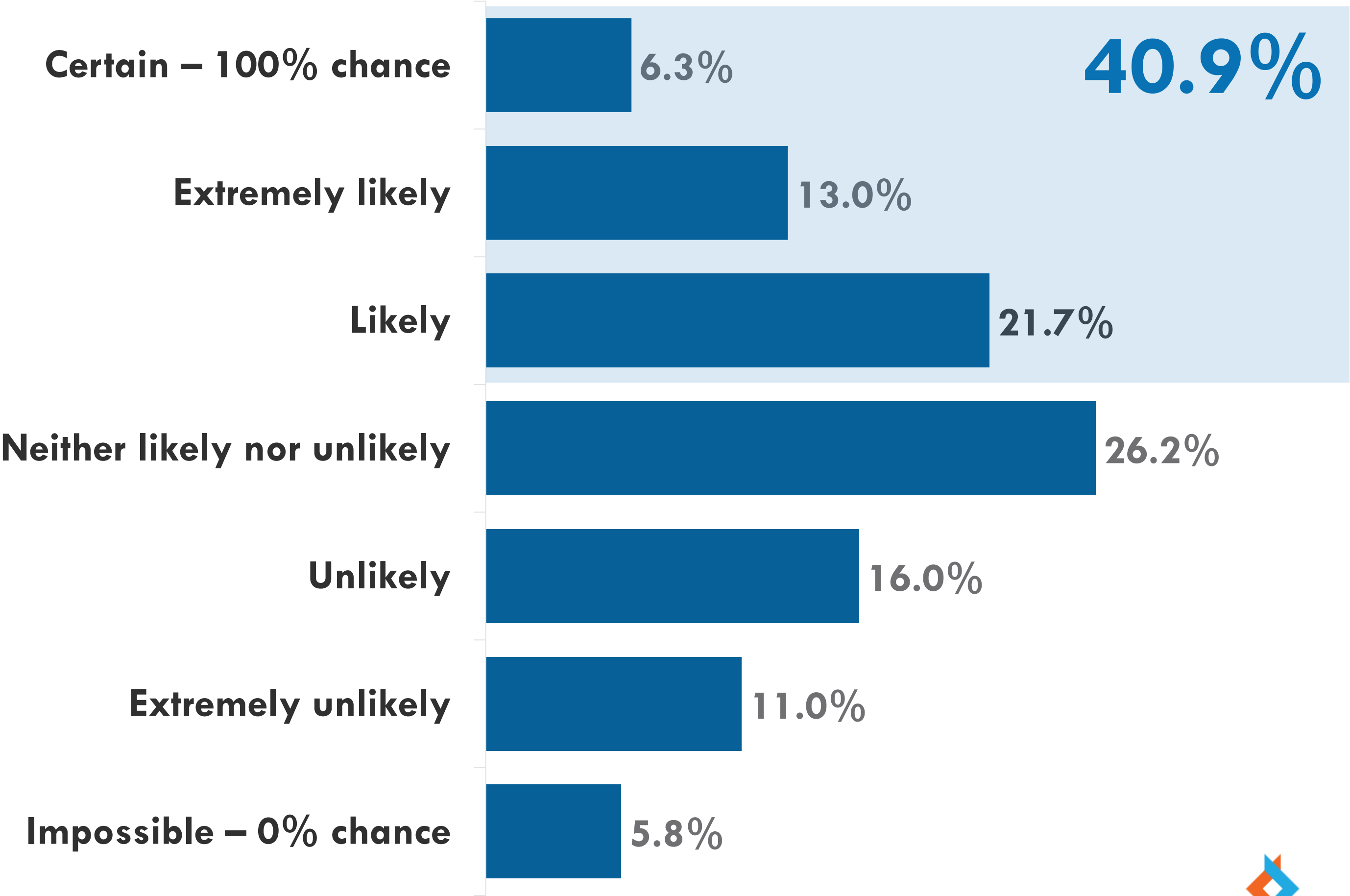
Top 3 Box Score: Certain, Extremely Likely or Likely

A photograph of three people in an office setting. On the left, a man with dark hair wearing a tan jacket over a black shirt holds a white sheet of paper. In the center, a woman with blonde hair wearing a blue and white striped shirt looks at a tablet. On the right, a woman with a colorful braid and a blue plaid jacket points at the tablet with a pen. The background features large windows and modern pendant lights.

Marketing.

TIKTOK WILL BECOME AMERICA'S MOST POPULAR SOCIAL MEDIA CHANNEL

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

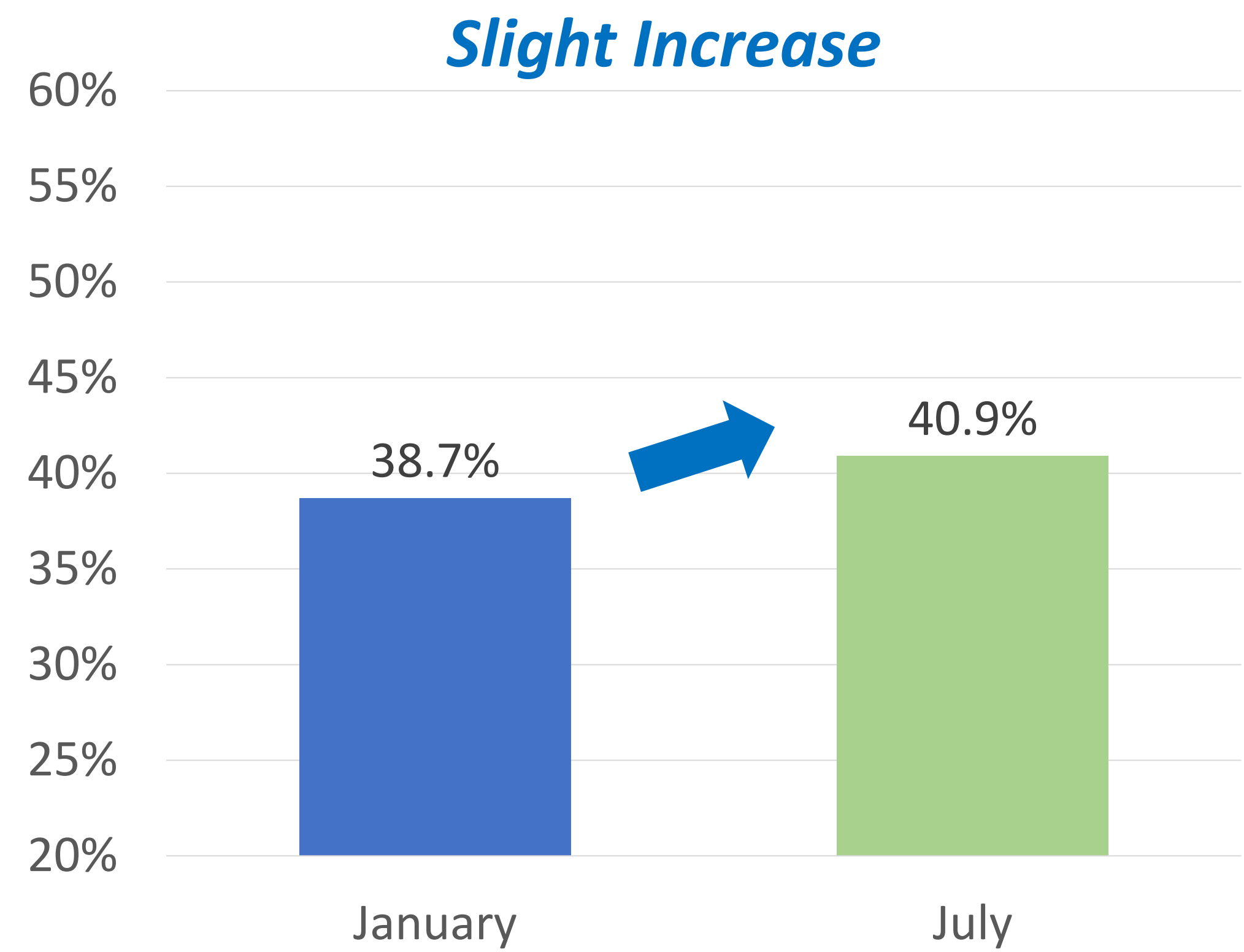


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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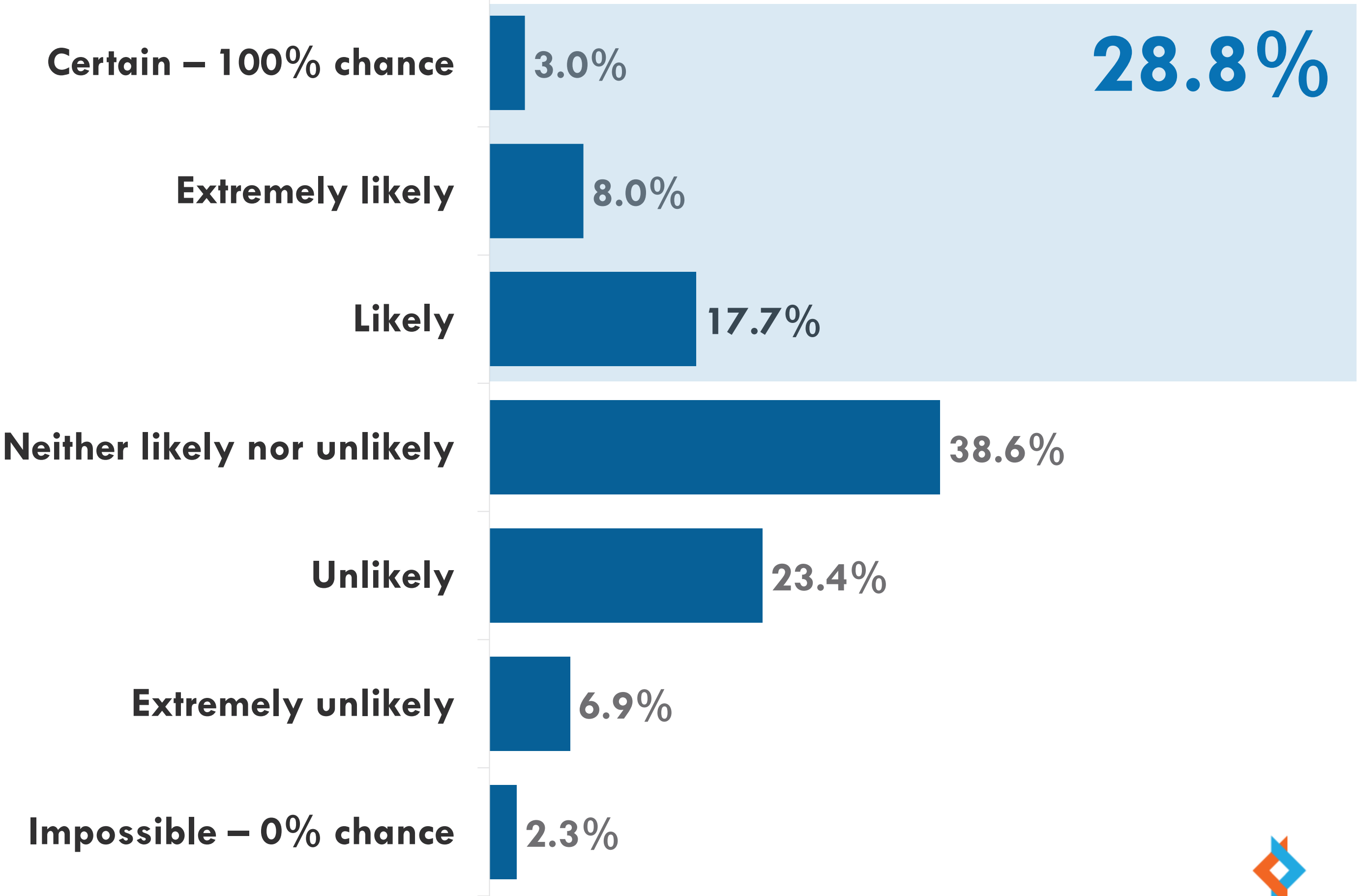
(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

THE APPEAL AND USE OF SOCIAL MEDIA "TRAVEL INFLUENCERS" WILL DECLINE

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

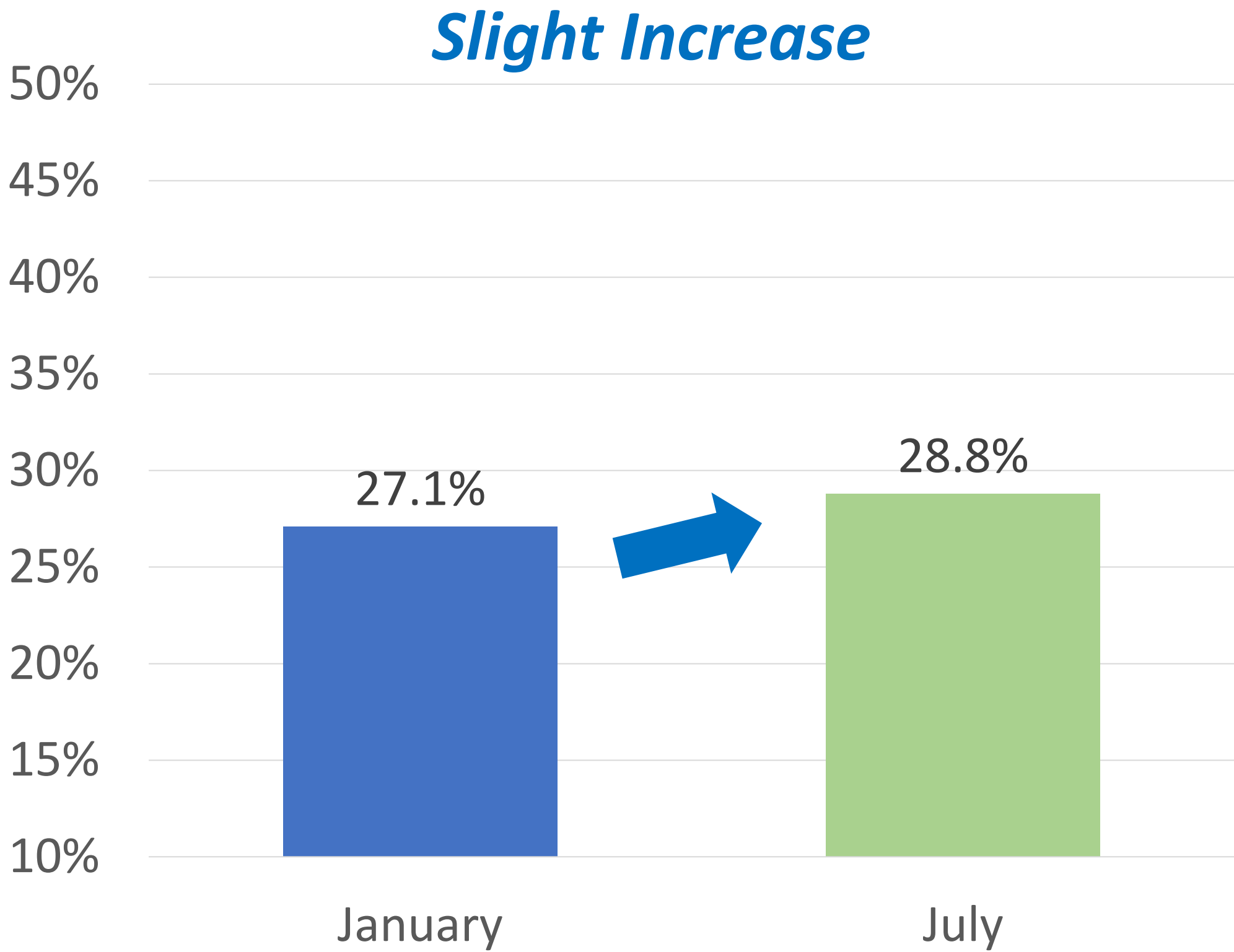


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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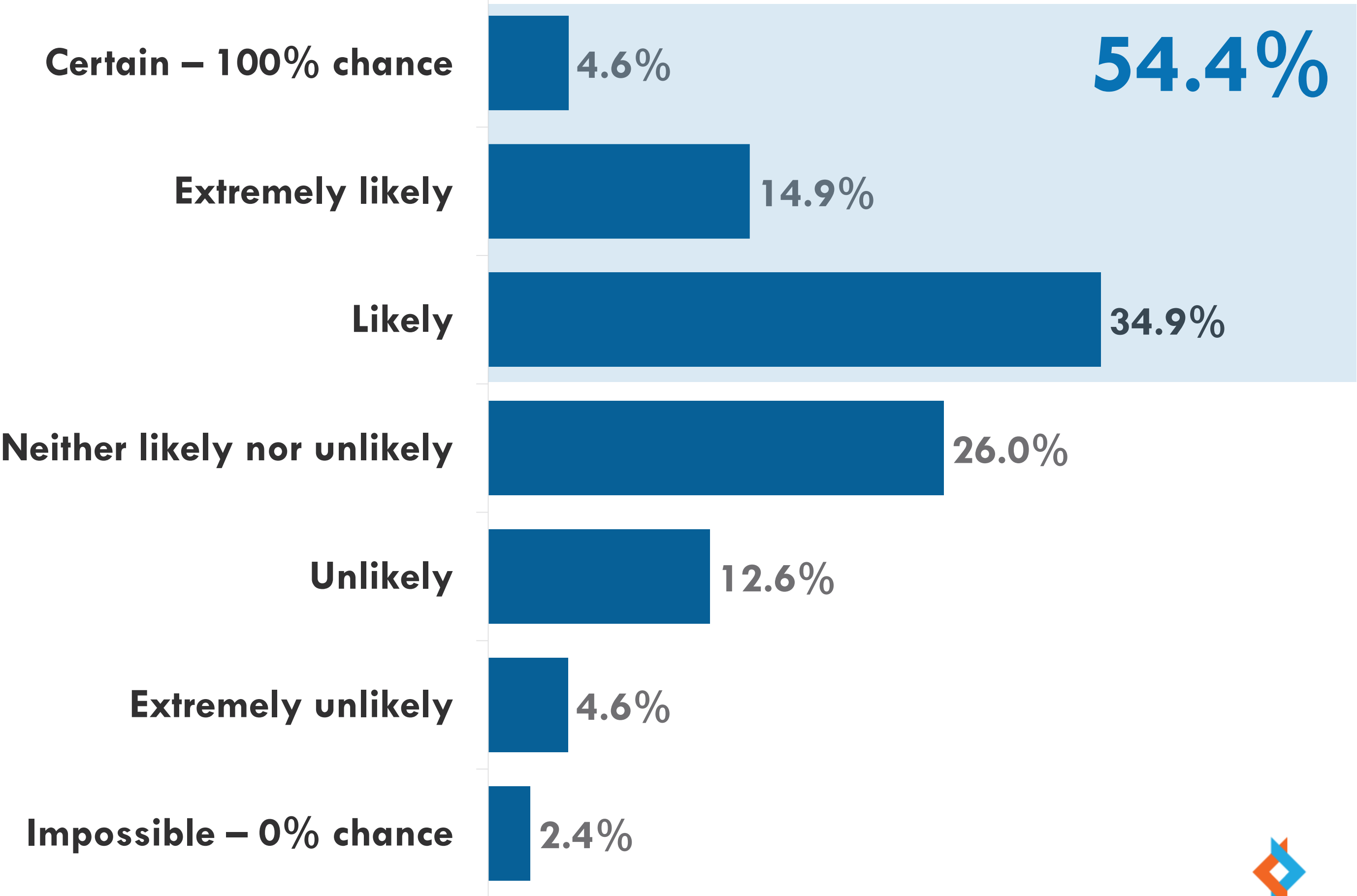
Top 3 Box Score: Certain, Extremely Likely or Likely



Technology

ARTIFICIAL INTELLIGENCE WILL BEGIN TO REPLACE TRAVEL AGENTS/ADVISORS

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

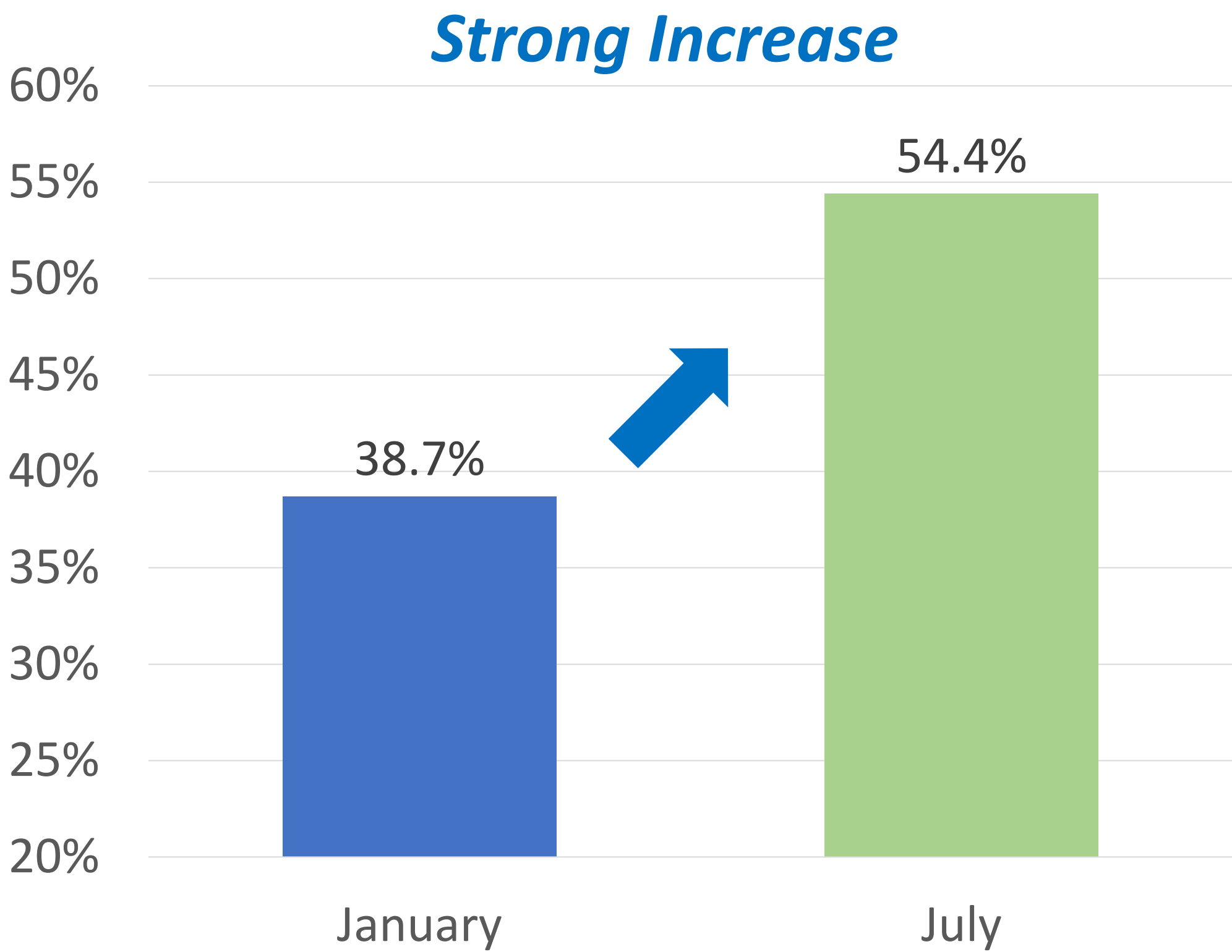


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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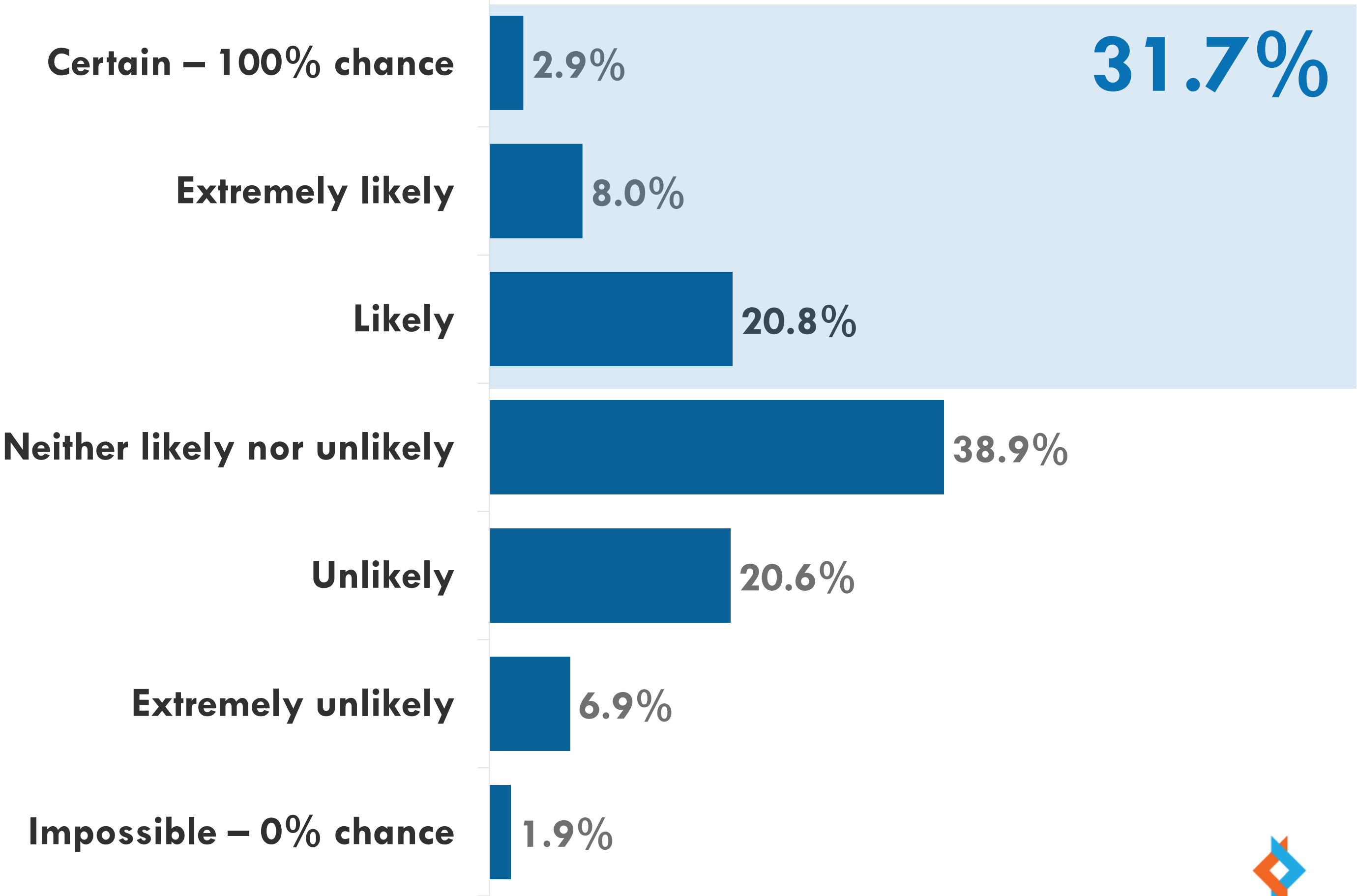
(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

TRAVEL AGENTS/ADVISORS WILL BE USED MORE BY TRAVELERS

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

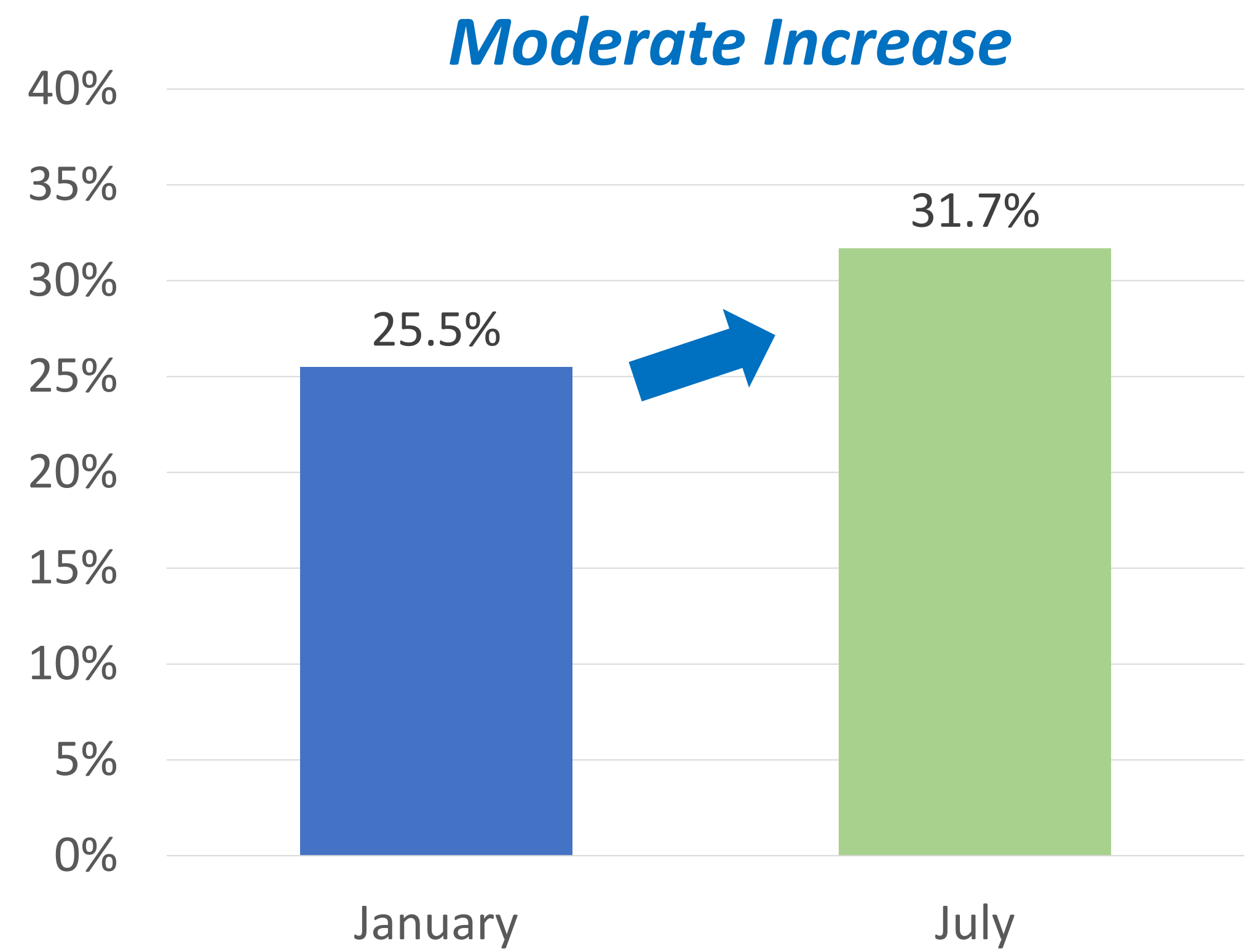


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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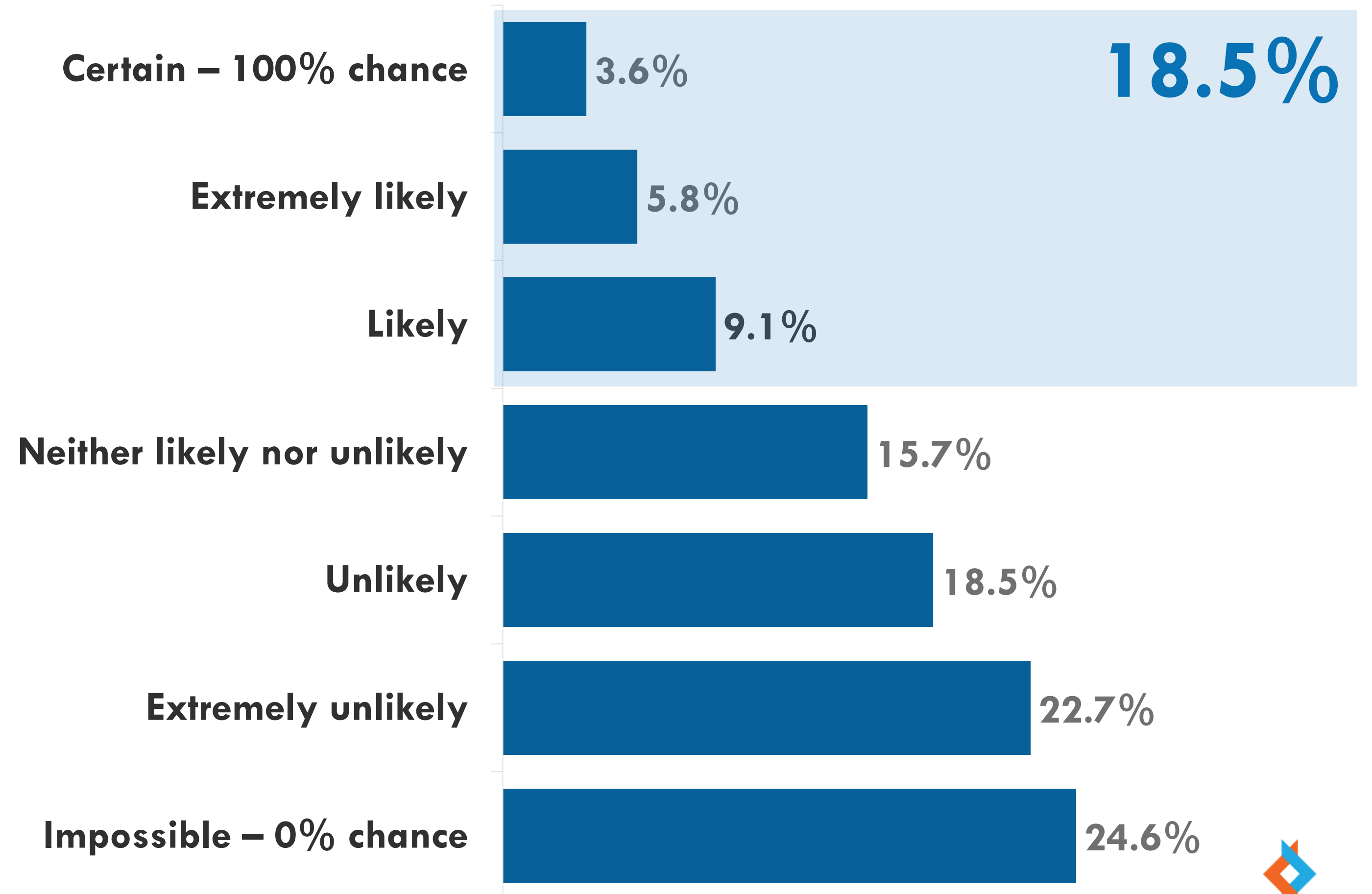
(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

I WILL PURCHASE MY FIRST VIRTUAL REALITY HEADSET

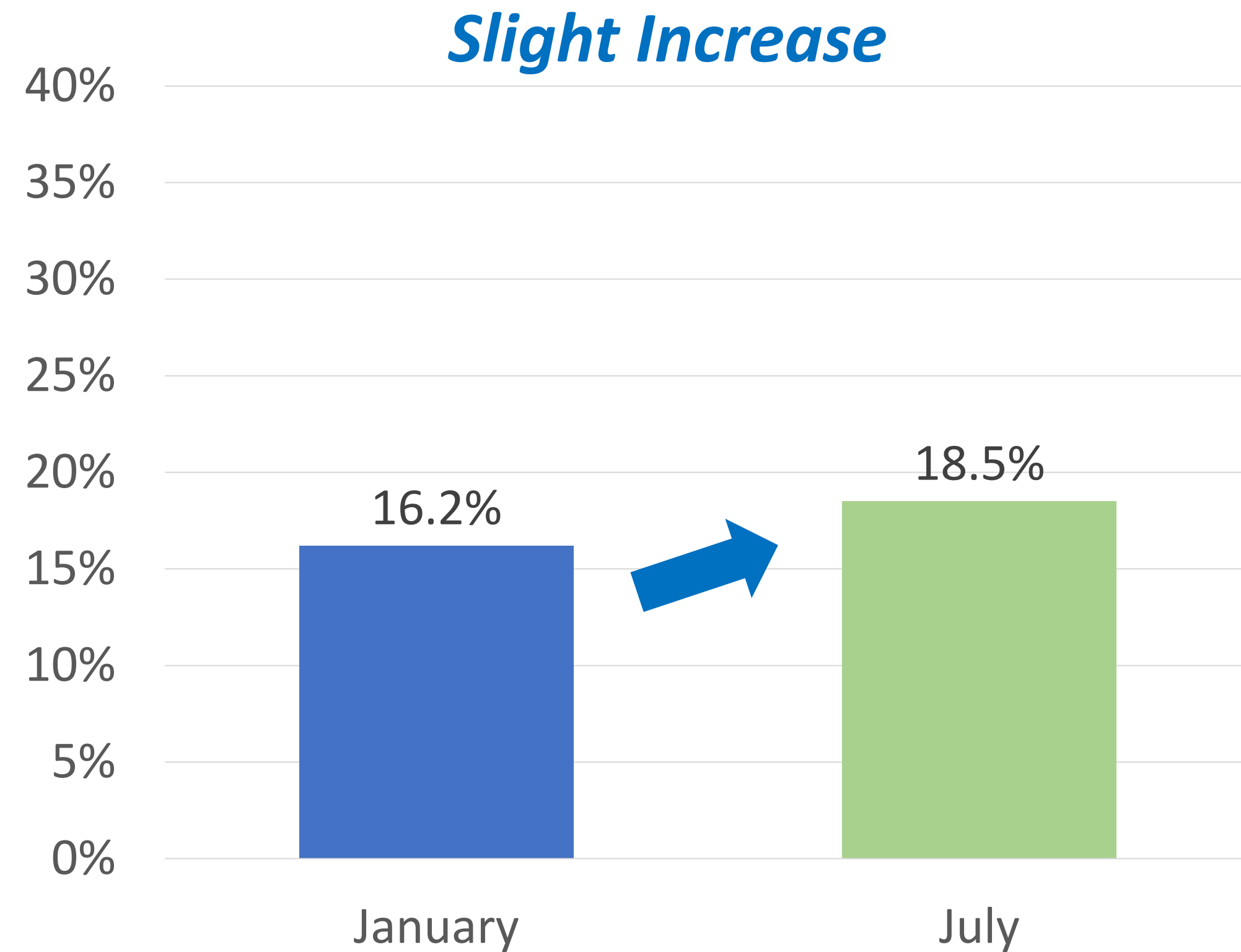
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(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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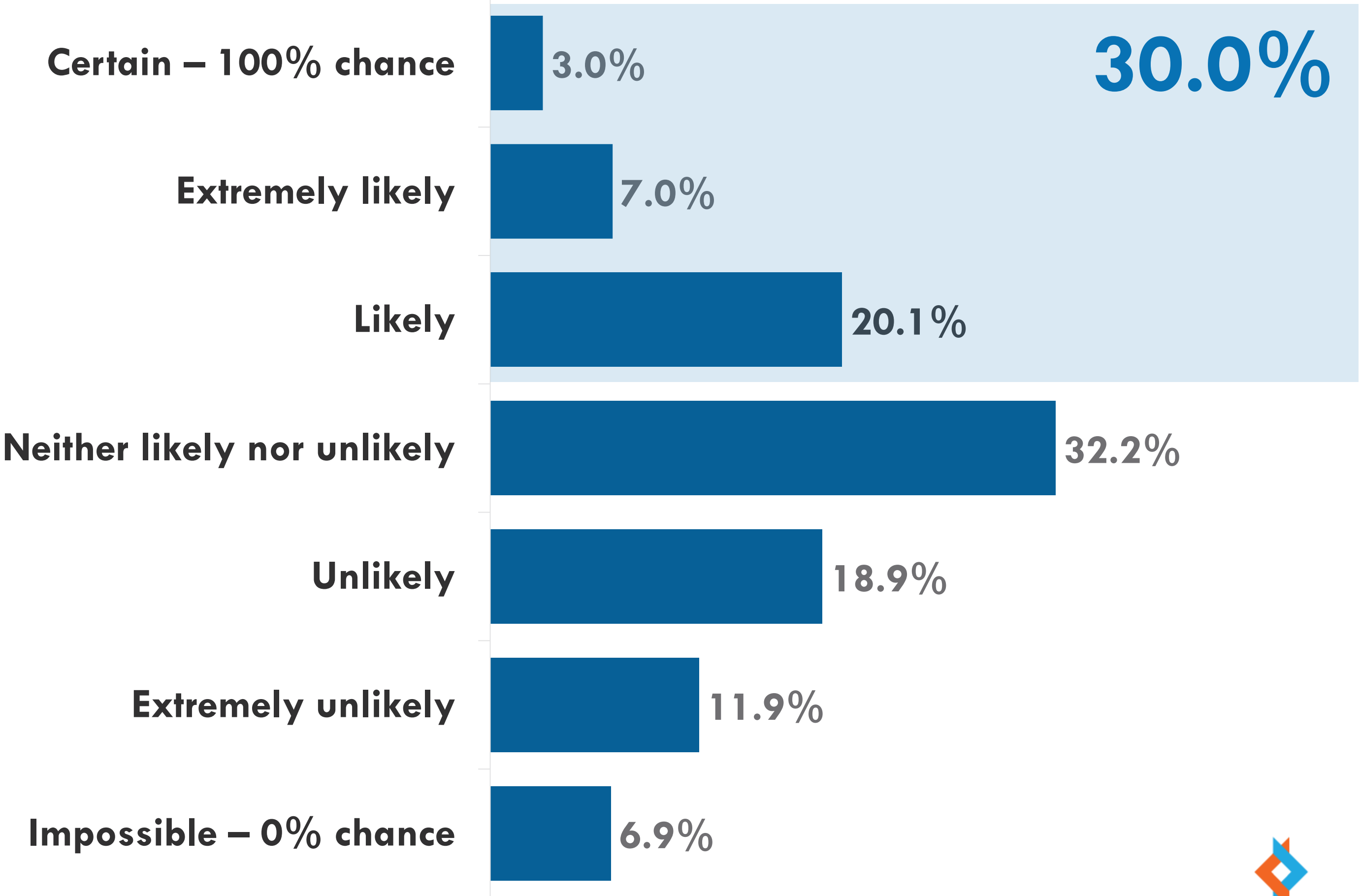


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

Top 3 Box Score: Certain, Extremely Likely or Likely

THE METAVERSE WILL START REPLACING SOME REAL-WORLD TRAVEL

Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

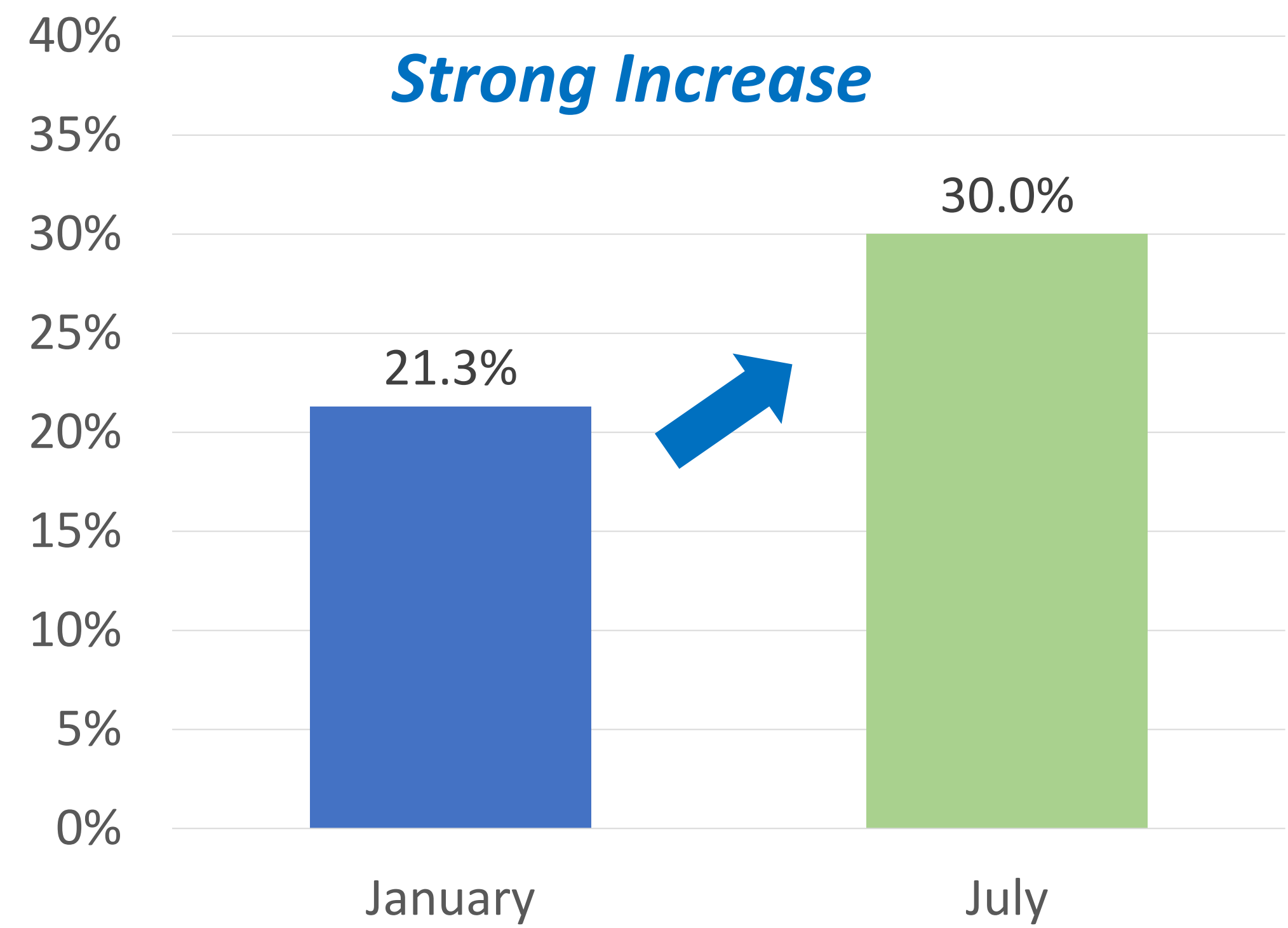


(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)

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Question: Let's talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be?

(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

High Likelihood

(50%+ Say it's at least likely)



Wildfire Problems in the West



Travel Becomes More Frustrating



Labor Shortages
in the Travel Industry



Travel Advisors Replaced by AI



Travel Industry Price Gouging
More Common

Medium Likelihood

(49-30%+ Say it's at least likely)



Dream Trips Happening!



Urban Areas Become
Unmanageable/Dangerous



Bull Market in 2023



TikTok Becomes #1 Social Platform



Demand for Authenticity Rises



Gas Prices Drop Sharply



War Expands Beyond Ukraine



More Proactivity in Green Travel



Travelers Advisors
Become More Popular



Travelers Sour on
Home Rental Services



National Parks
Overrun by Visitors



Metaverse Starts Replacing Travel

Lower Likelihood

(29-0% Say it's at least likely)



US in War in Asia



Influencers Decline in Popularity



First-time VR Headset Buyers

THE BIG CHANGERS:

Decreased Likelihood



Labor Shortages
in the Travel Industry

Increased Likelihood



National Parks
Overrun by Visitors



Metaverse Starts Replacing Travel



Travel Advisors Replaced by AI



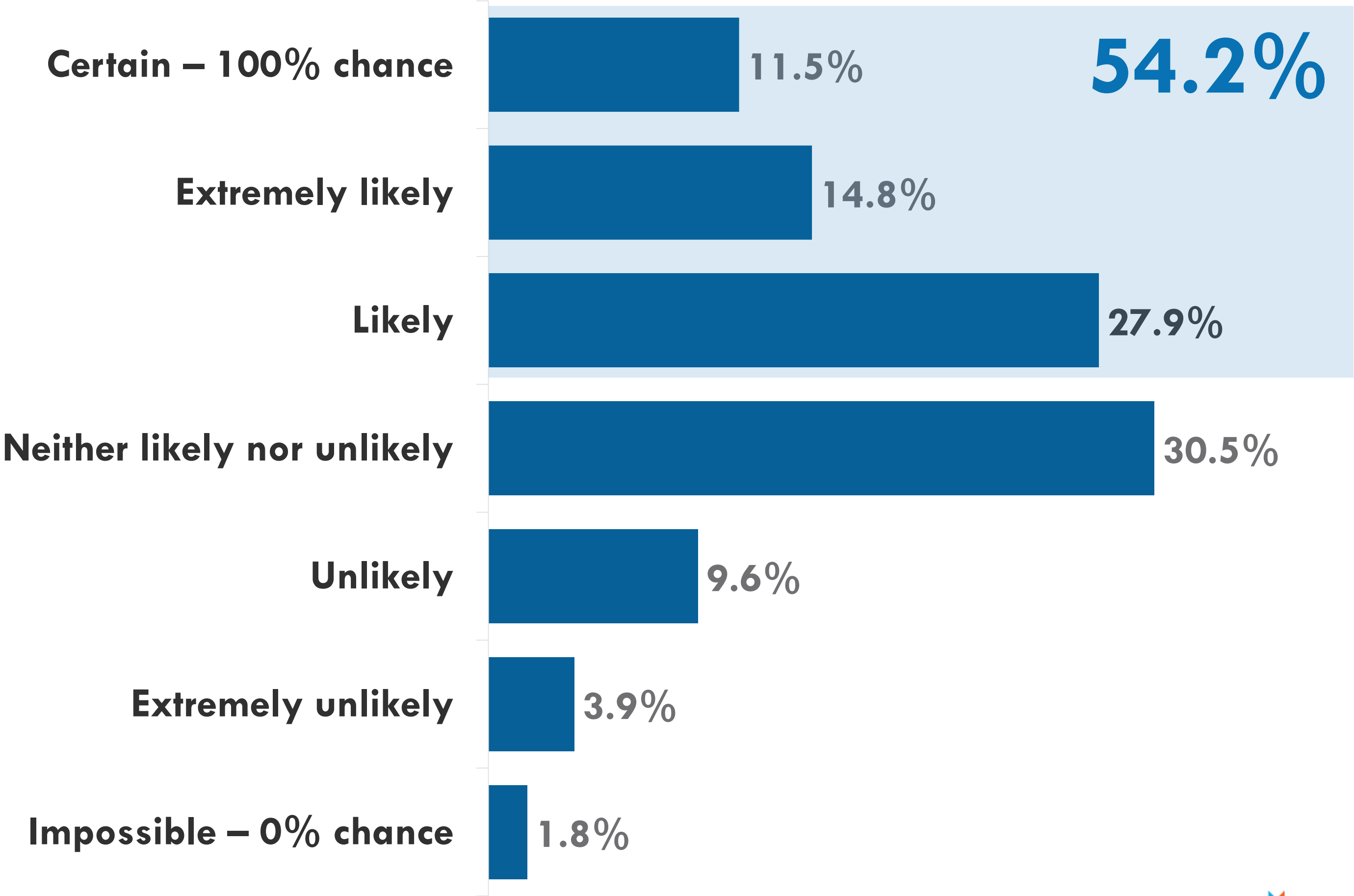
Travelers Advisors
Become More Popular

A person with long dark hair, seen from behind, stands on a beach looking out at the ocean. The water is dark blue with white foam from breaking waves. In the distance, a large, flat-topped mountain (Table Mountain) is silhouetted against a sunset sky with soft orange and pink clouds. The word "Personal" is written in a white, handwritten script across the middle of the image.

Personal

THE NEXT YEAR WILL BE A GREAT YEAR FOR ME PERSONALLY

Question: Let's talk about next year. Thinking about the next 12 months will evolve, how likely do you think each of the following will be?

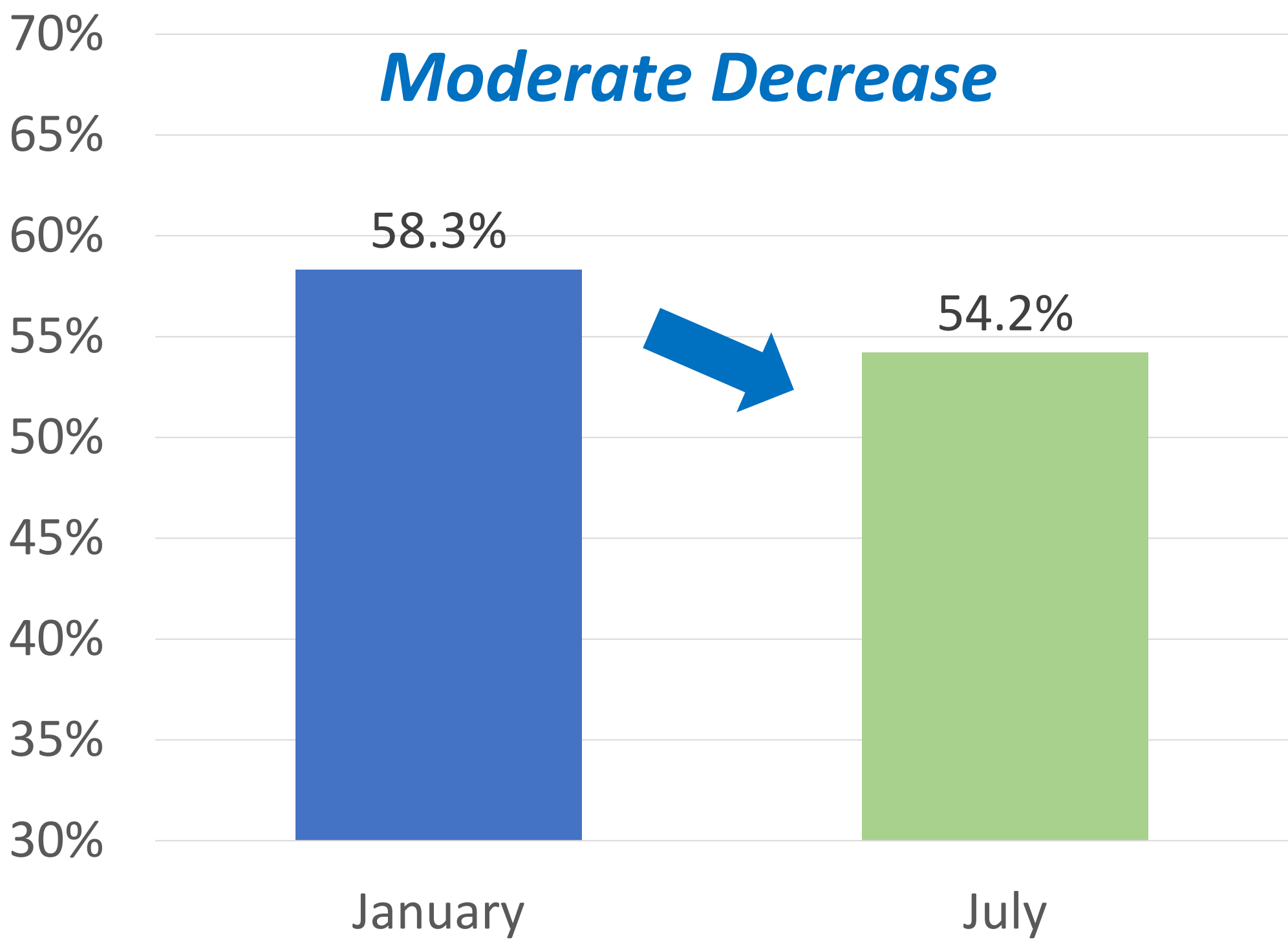


(Base: All respondents, 4,017 completed surveys. Data collected November 15-25, 2022.)

THE NEXT YEAR WILL BE A GREAT YEAR FOR ME PERSONALLY

Question: Let's talk about next year. Thinking about the next 12 months will evolve, how likely do you think each of the following will be?

(Base: All respondents, 4,011 completed surveys. Data collected July 17-21, 2023.)



Top 3 Box Score: Certain, Extremely Likely or Likely

Social Media

MARKETING TRAVEL



Facebook



Pinterest



WhatsApp



Gmail



Snapchat



Instagram



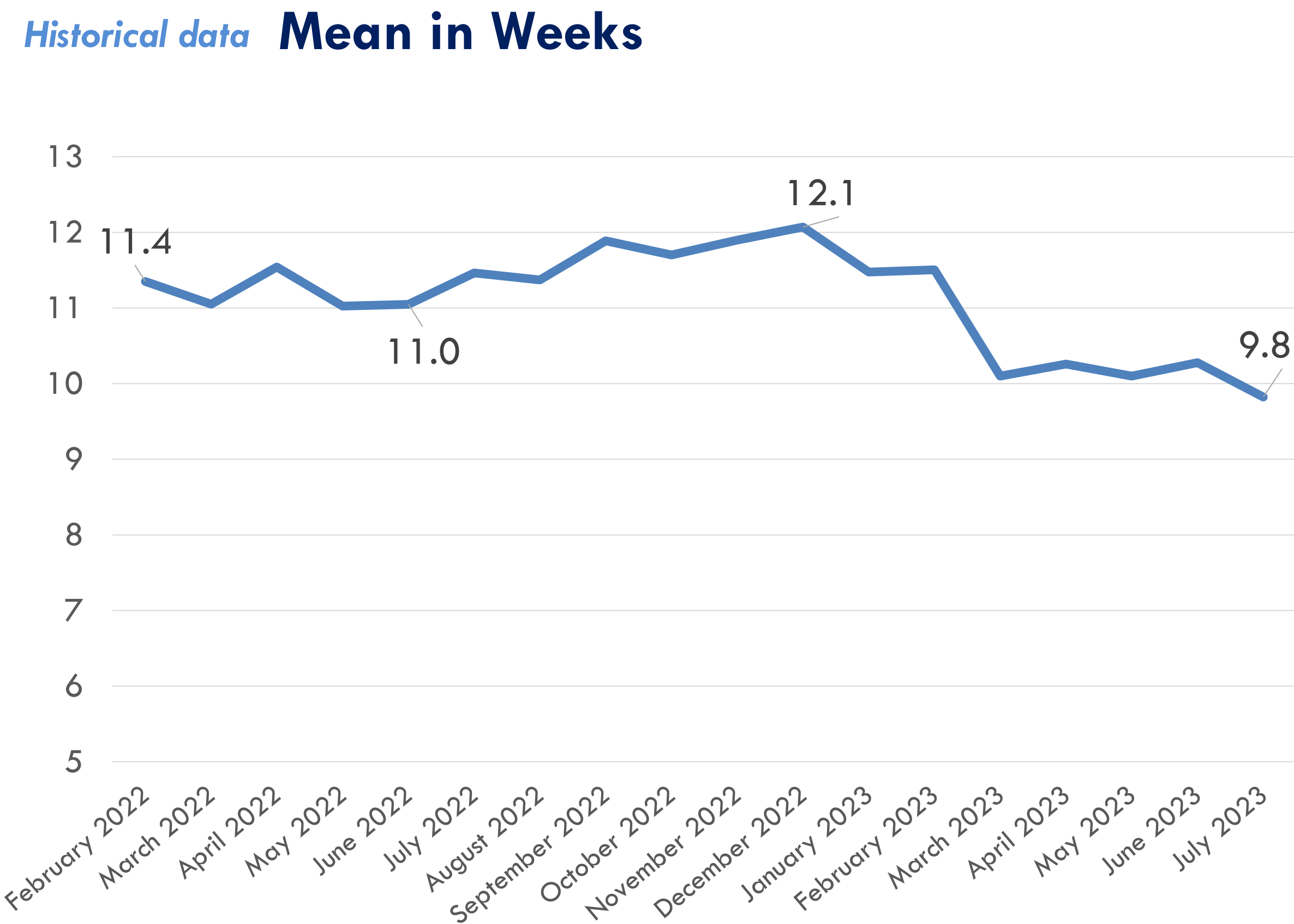
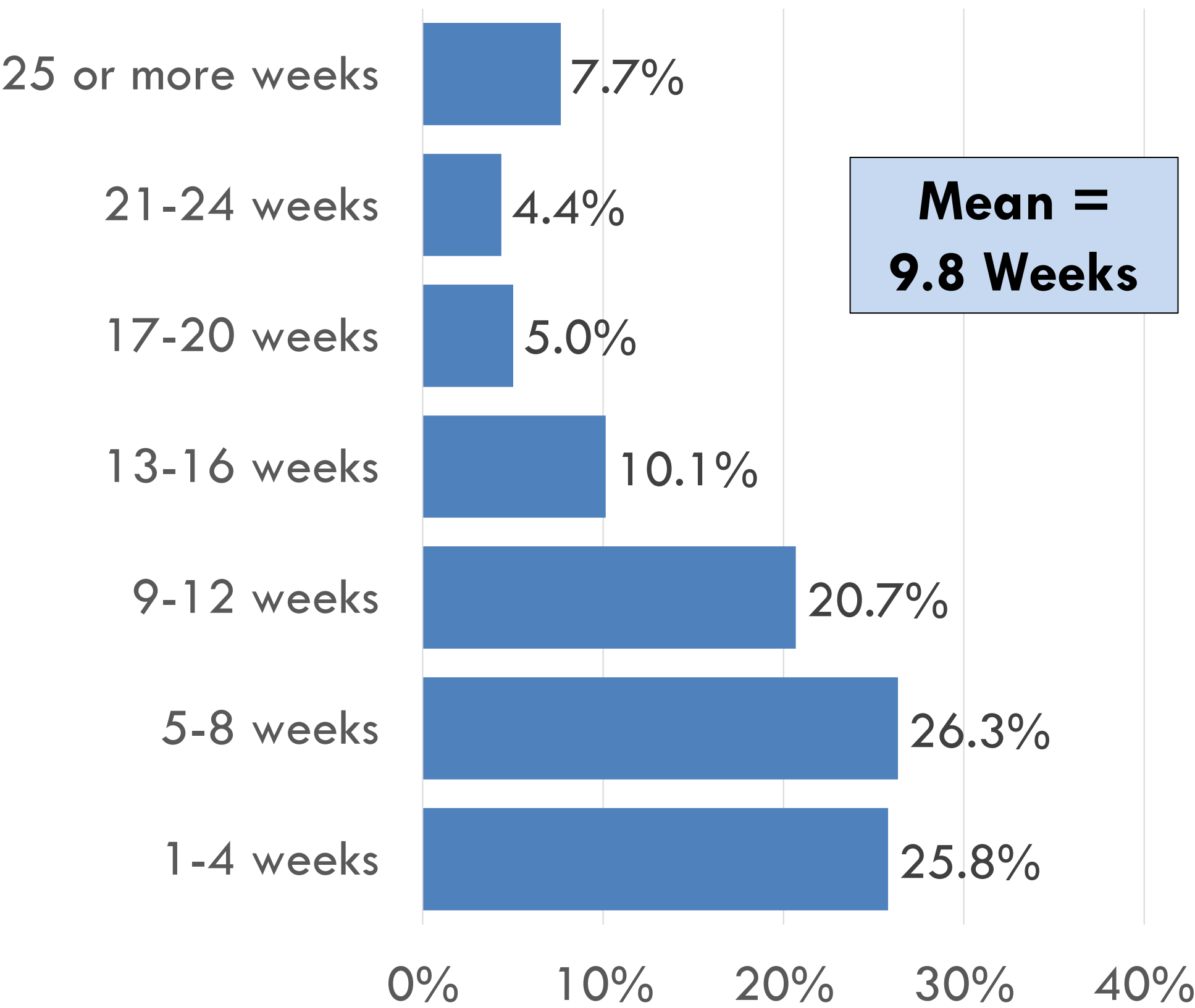
Viber



YouTube

PLANNING WINDOW FOR DOMESTIC LEISURE TRAVEL

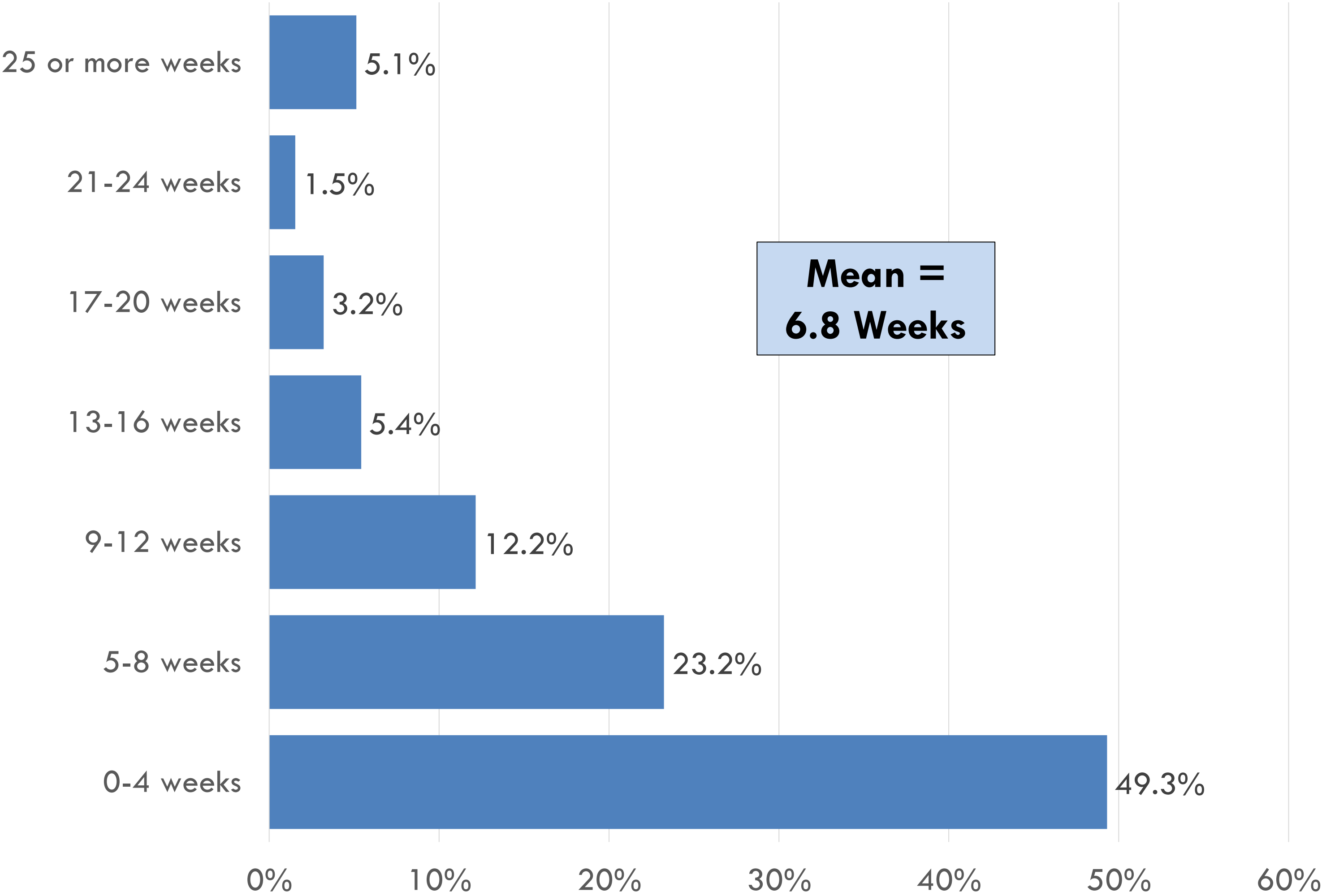
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



OVERNIGHT TRIPS: PLANNING WINDOW

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

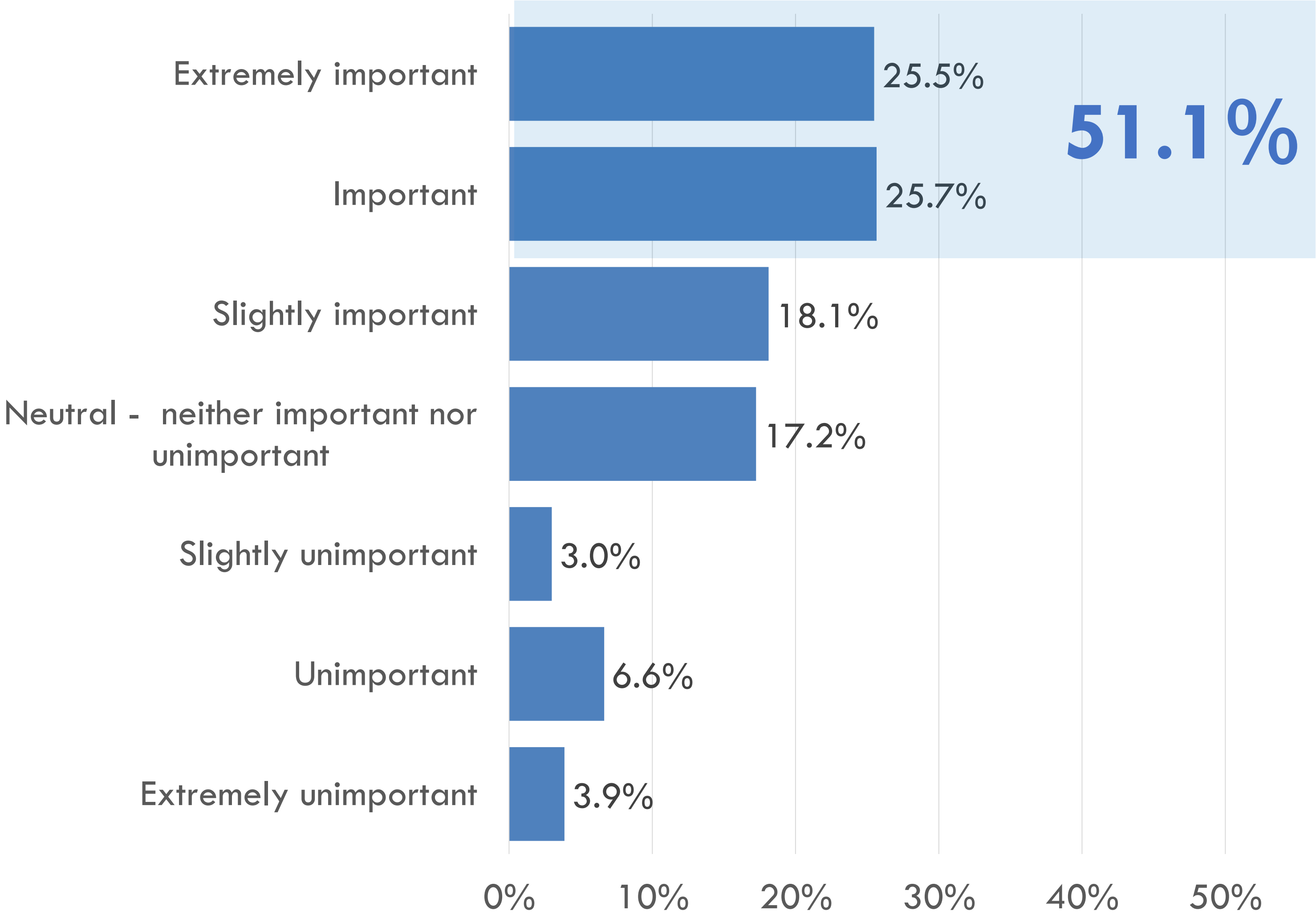
(Base: Respondents who took an overnight trip, 2,577 completed surveys. Data collected July 18-22, 2023.)



IMPORTANCE OF TRAVEL REWARDS PROGRAMS

Question: How important are travel rewards programs (hotels, airlines, etc.) to how you generally plan your leisure travels?

*(Base: All respondents, 4,011 completed surveys.
Data collected July 18-22, 2023.)*

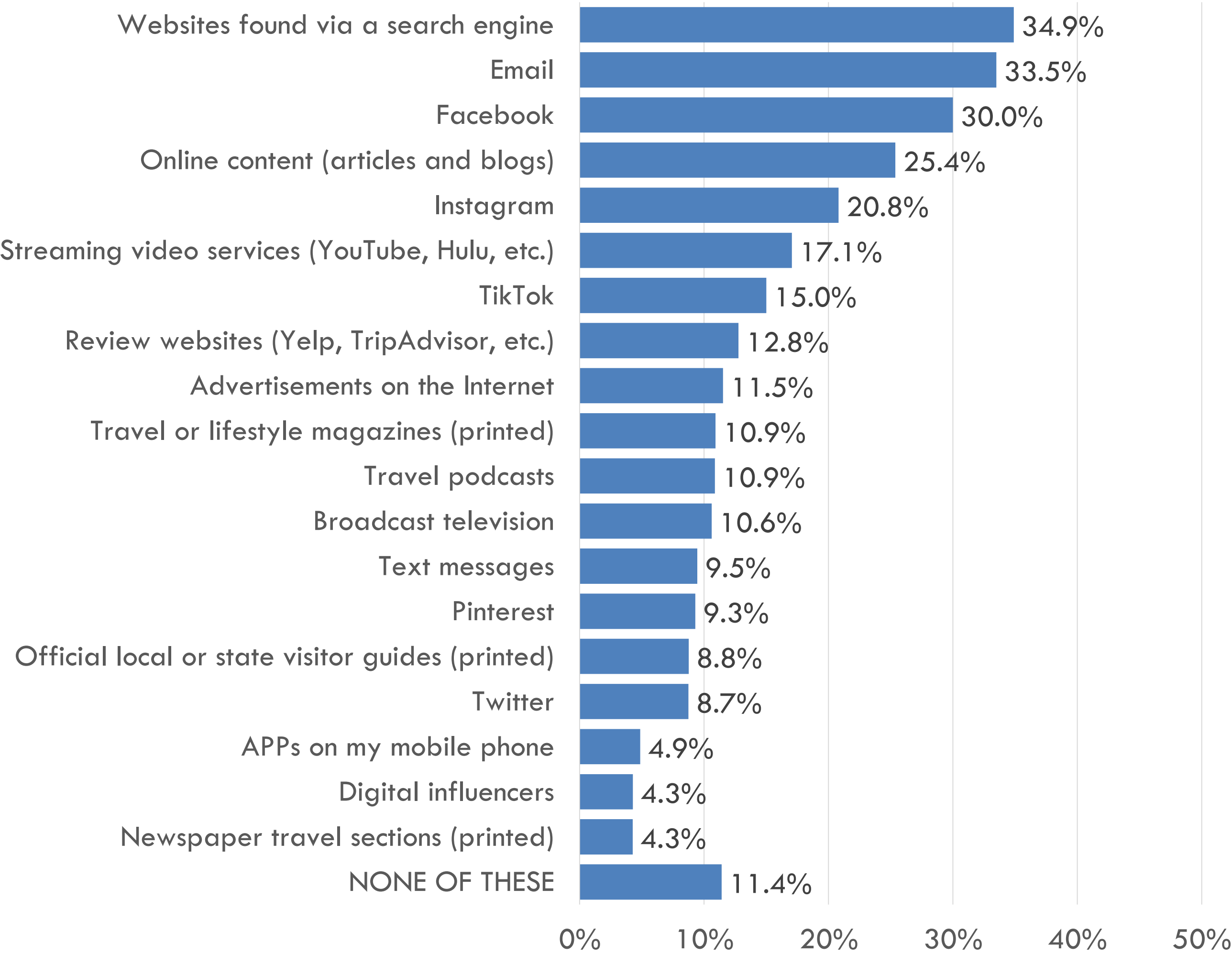


DESTINATION INSPIRATION SOURCES

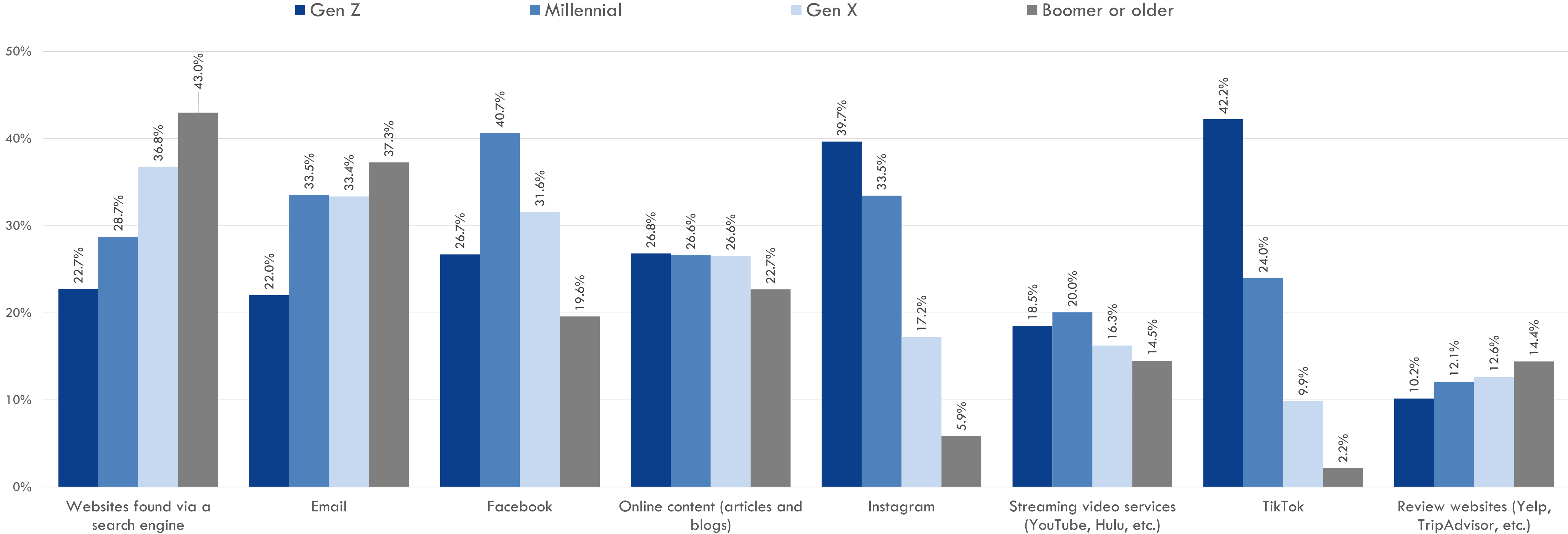
Question: Please think about how travel destinations could best reach you with their messages right now.

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

(Base: All respondents, 4,011 completed surveys.
Data collected July 18-22, 2023.)



TOP DESTINATION INSPIRATION SOURCES: BY GENERATION





BEST PRACTICES IN TIKTOK CONTENT FOR TRAVEL BRANDS FULL REPORT IS AVAILABLE TODAY!



**SCAN
HERE TO
PURCHASE!**

Destination  Analysts

PASSION PROFILES



Follow Us for Ongoing Travel Insights

Insta:@destinationanalysts

FB:@destinationanalystsindustry

LI: @destinationanalystsinc



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



Next Week:
We'll Share Our
Exciting News

