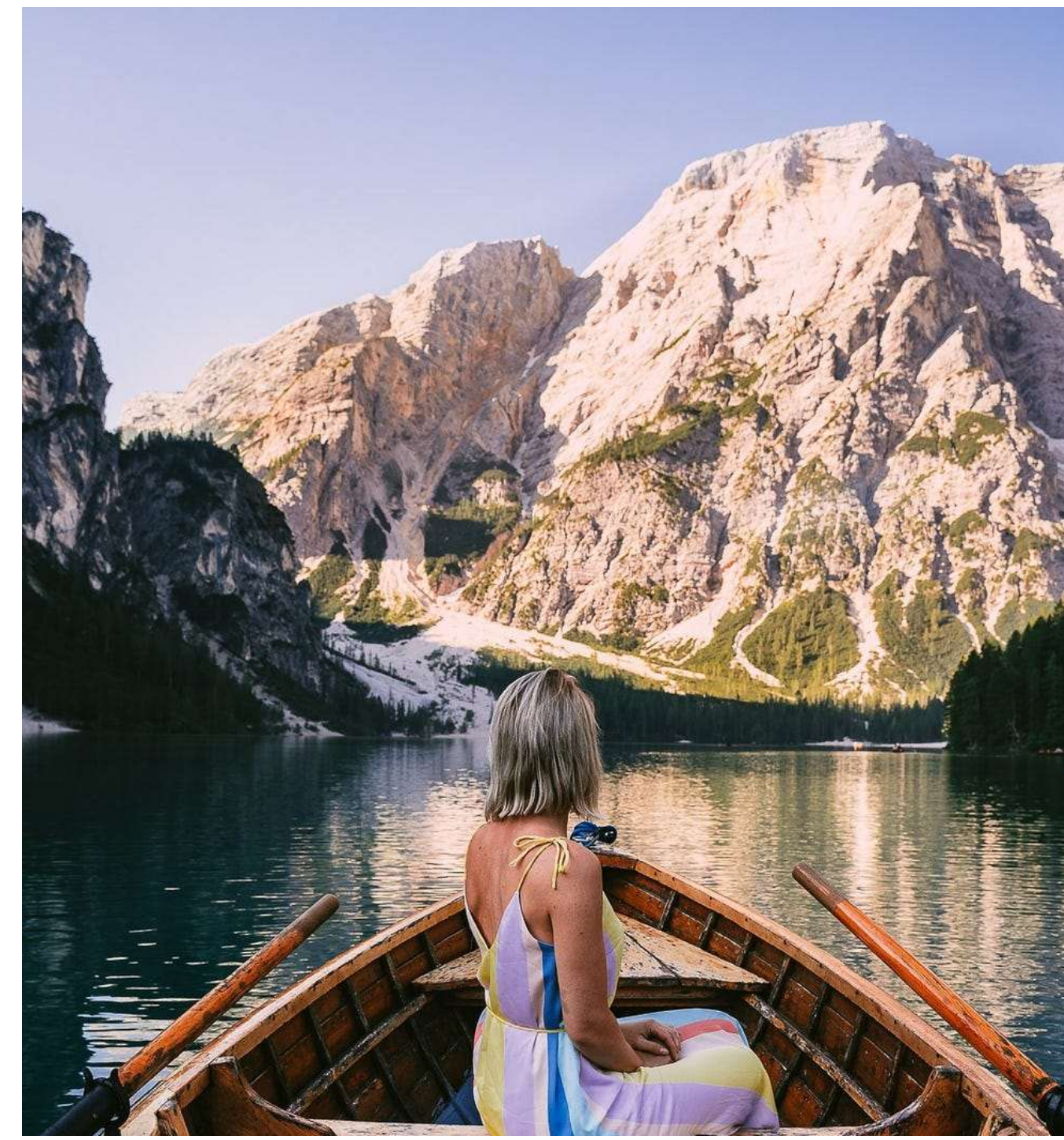


THE STATE OF THE AMERICAN TRAVELER

Presented by
Destination  Analysts

JUNE 2023



Destination Analysts

Deep | Actionable | Defensible | Timely

Follow Us for Ongoing Travel Insights

Insta:@destinationanalysts

FB:@destinationanalystsindustry

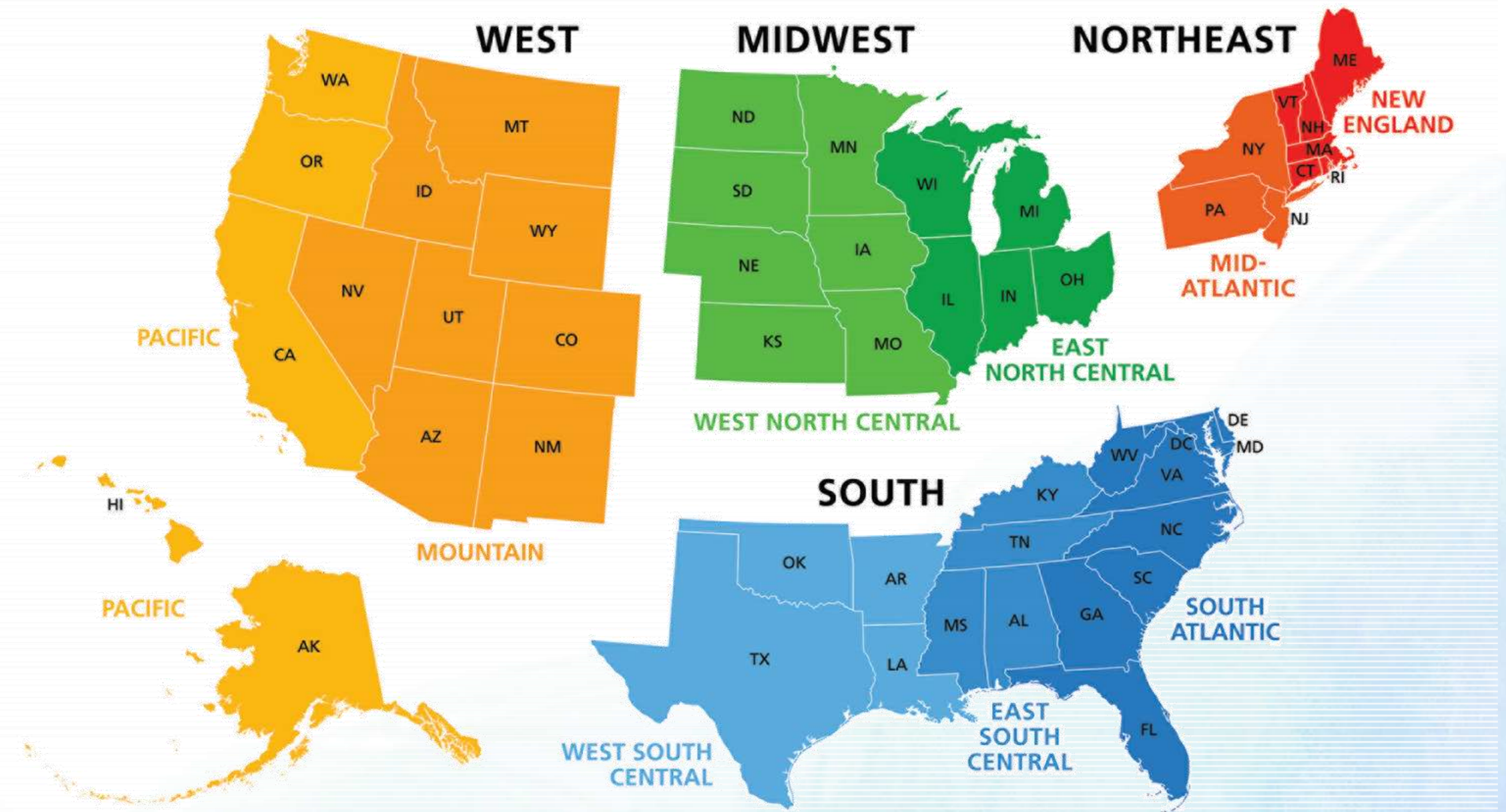
LI: @destinationanalystsinc



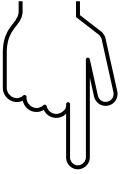
METHODOLOGY

- 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: [May 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





RECORDING + DECK 

DestinationAnalysts.com



What One Word Describes
How You Feel About
Travel Right Now?

What ONE WORD best describes how you feel about travel right now?

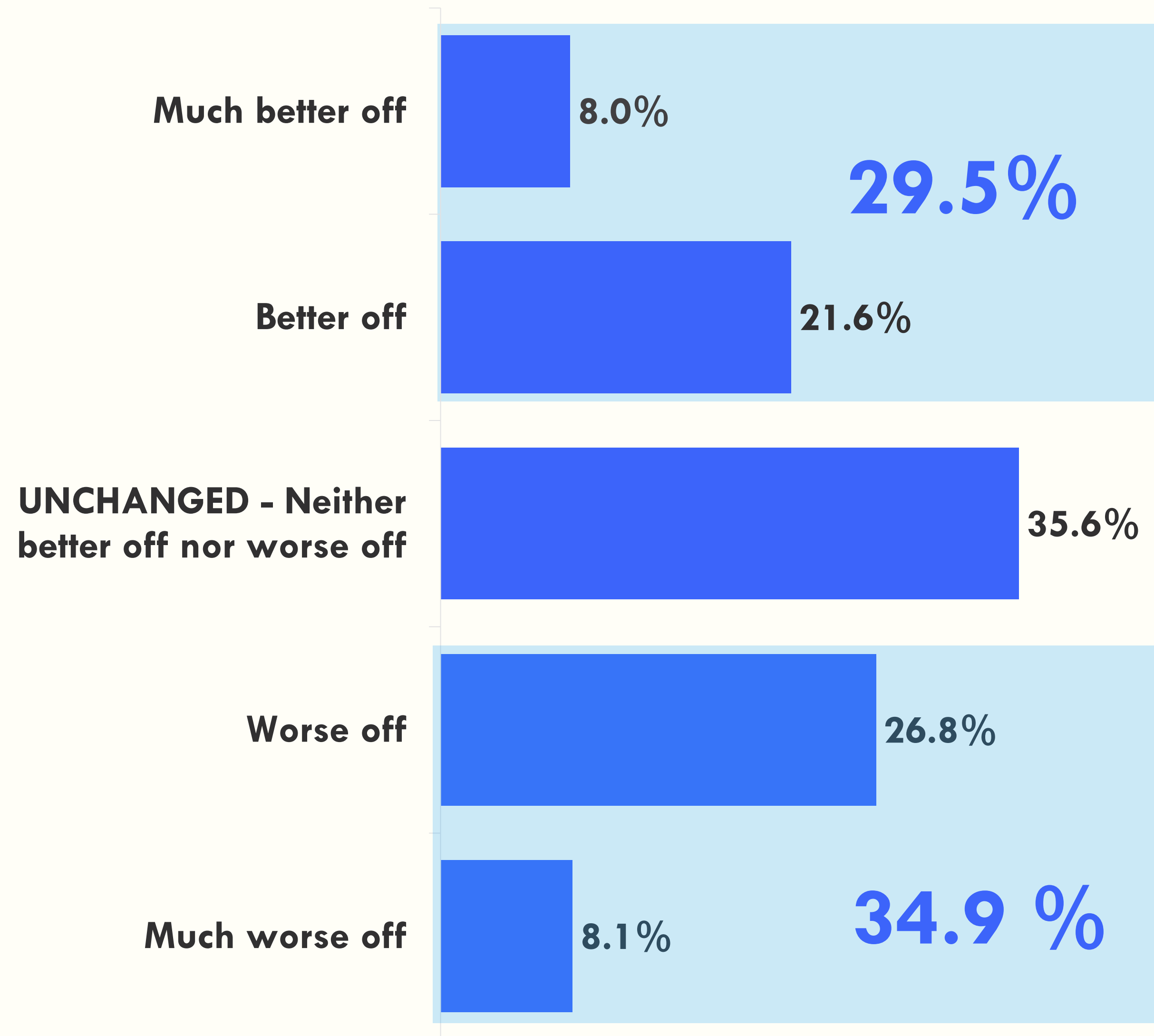


TRAVELER SENTIMENT



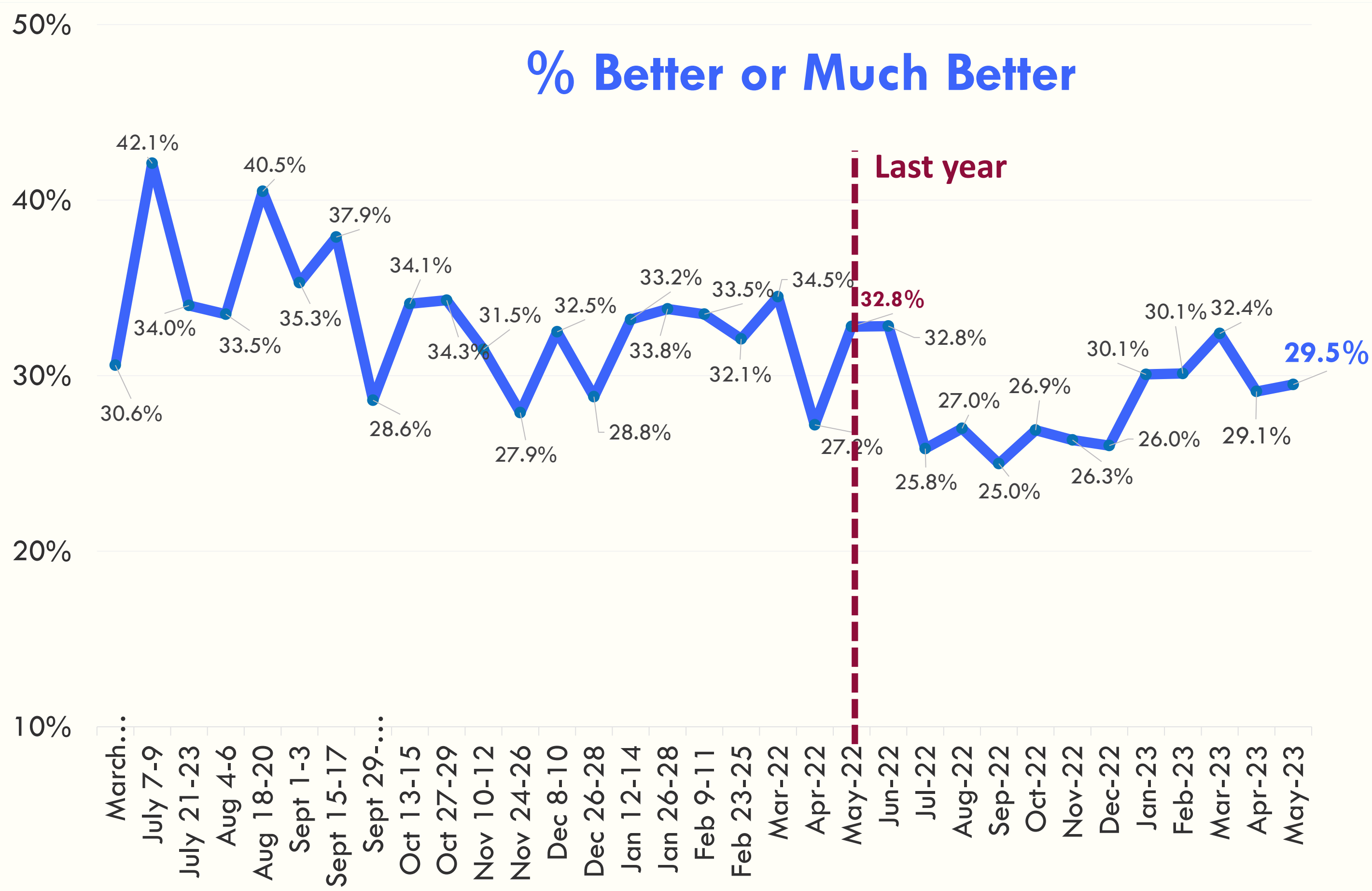
Question:

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



(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

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



Leading into the summer season, travelers are feeling somewhat less financially well off 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

6.9%

27.5%

Yes - It is a good time

20.6%

It is neither a good time
nor bad time

35.4%

No - It is a bad time

24.0%

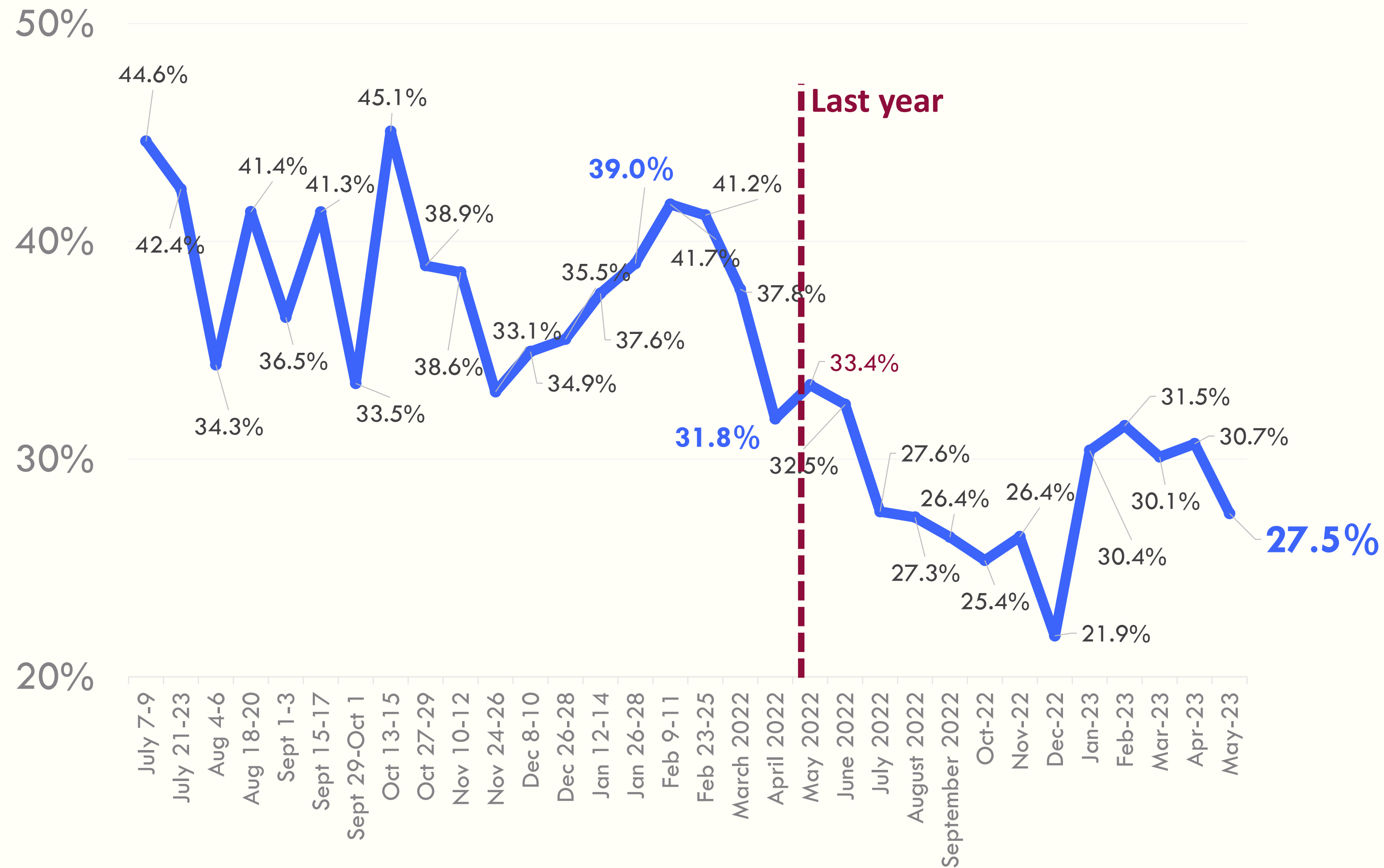
No - It is a very bad time

13.1%

37.1%

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

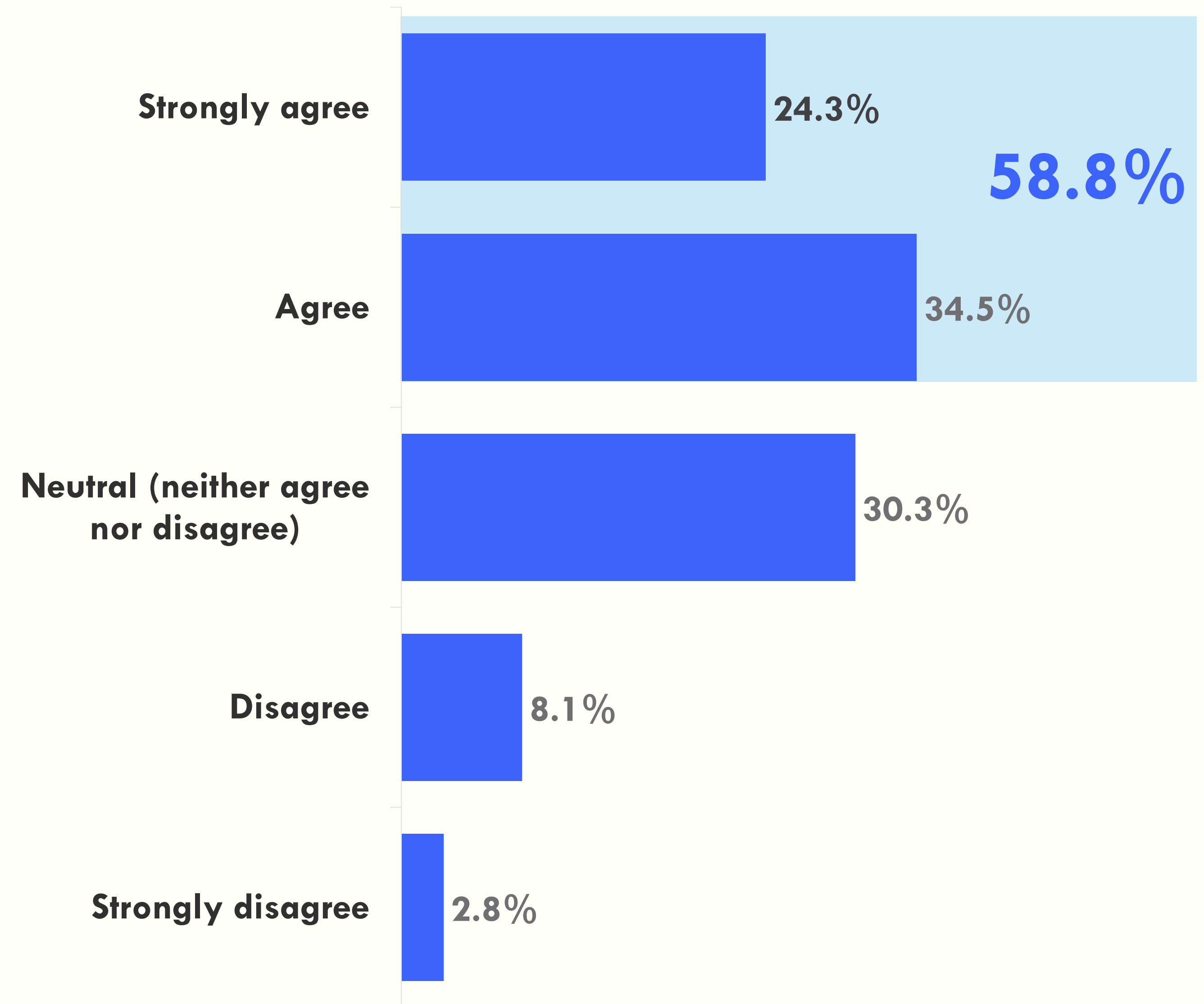
60% % Good or Very good time to spend on travel



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

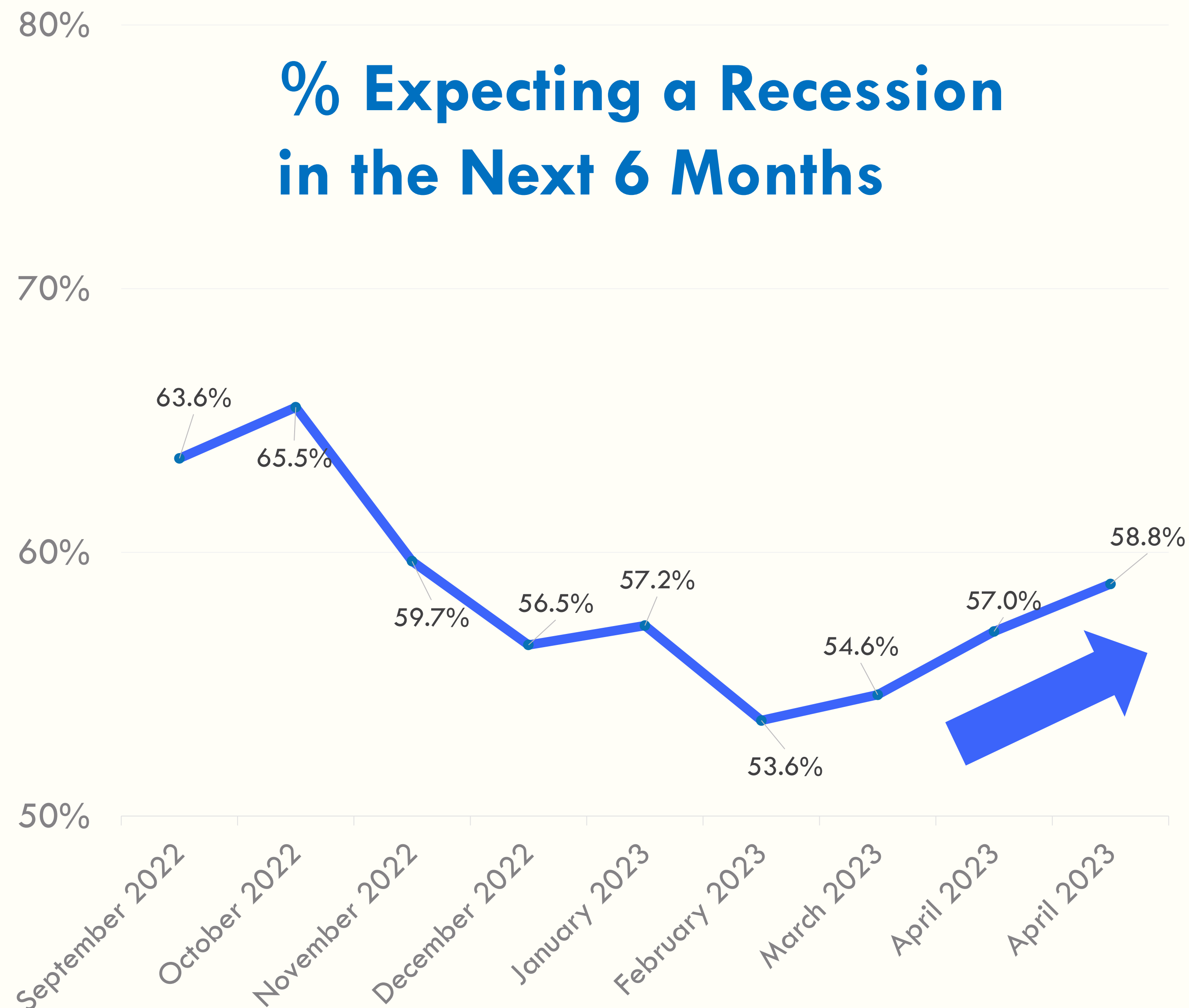
Question:

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



(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

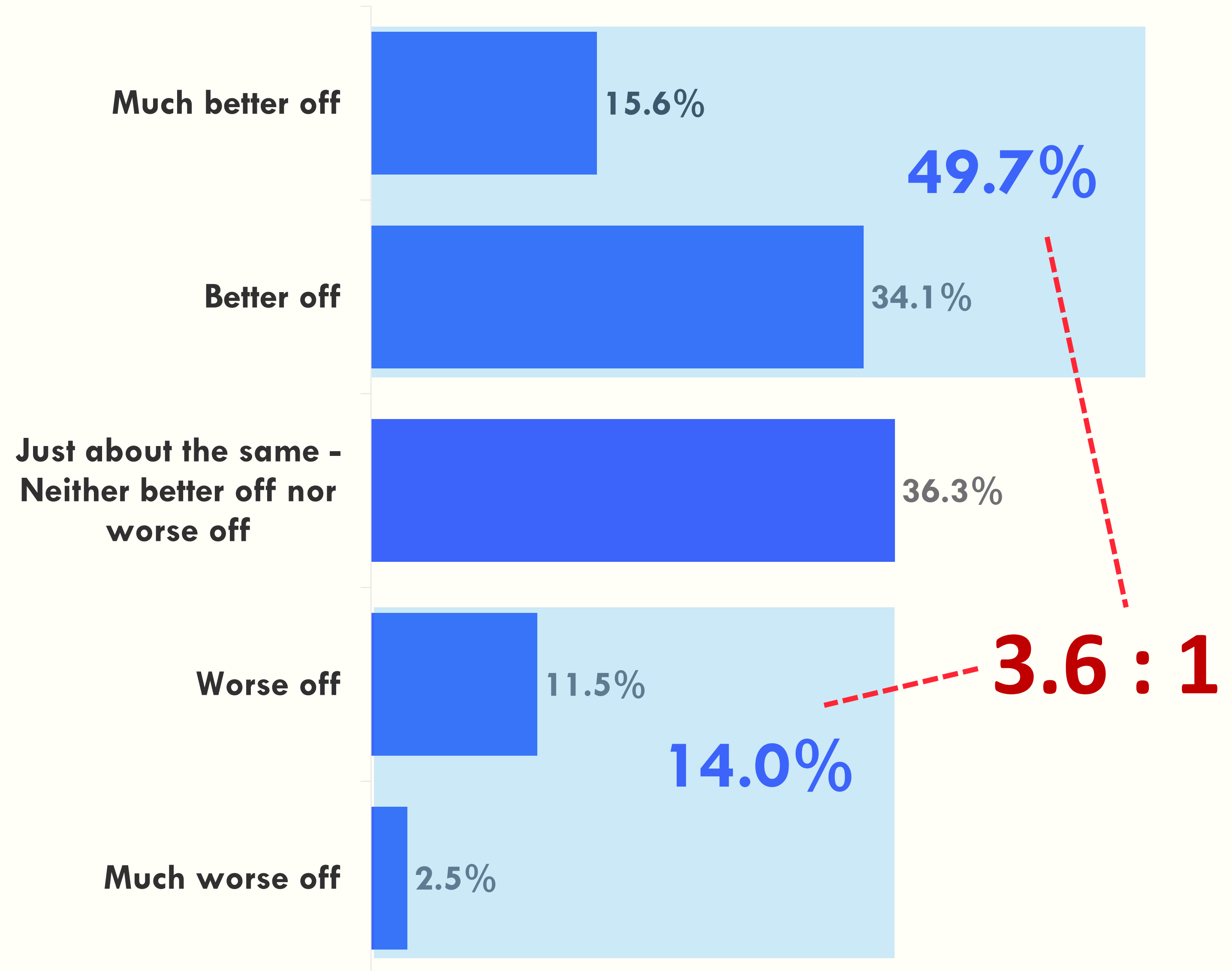
% Expecting a Recession in the Next 6 Months



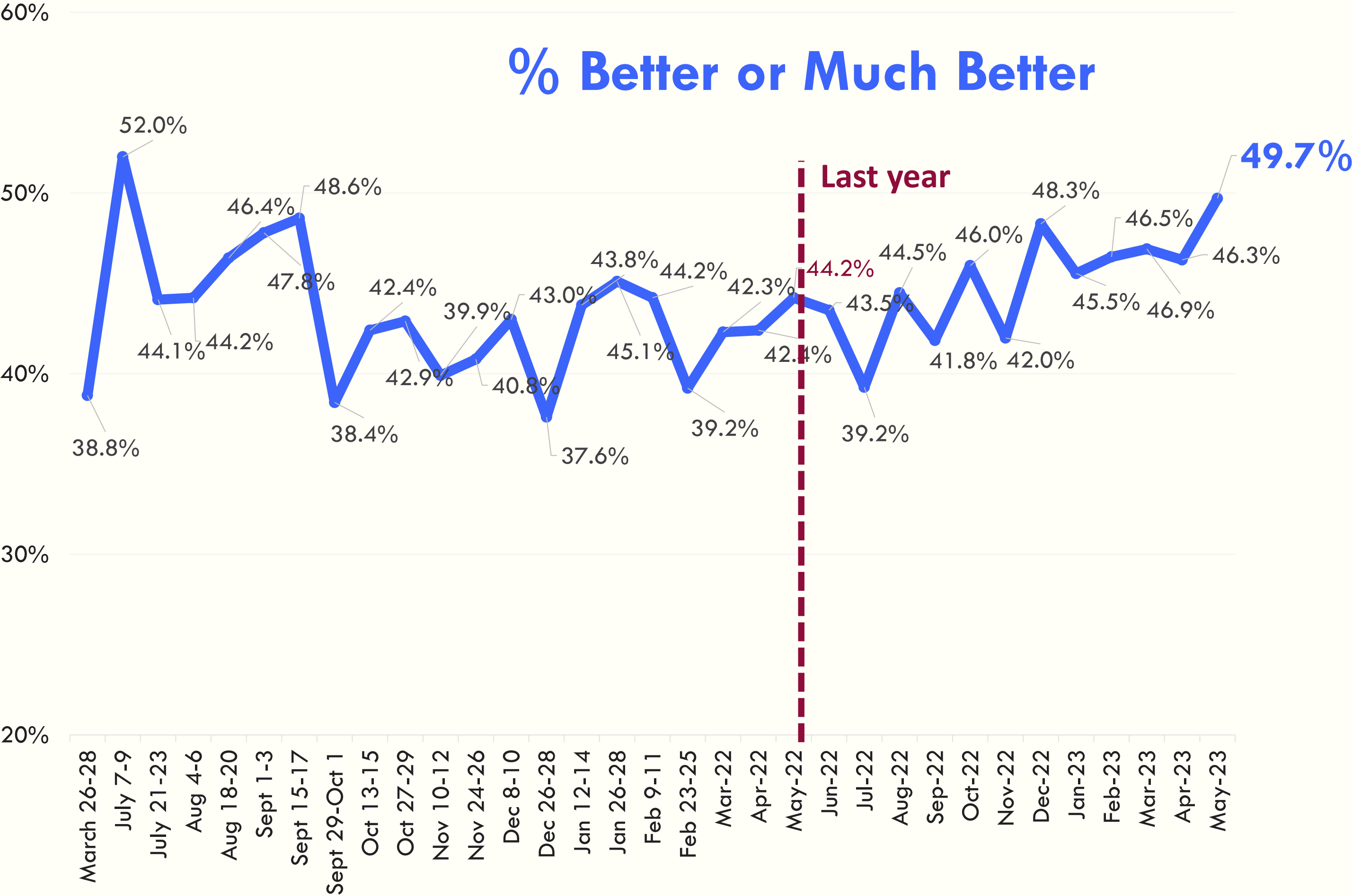
Recessionary
concerns continue
to be widespread.

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?



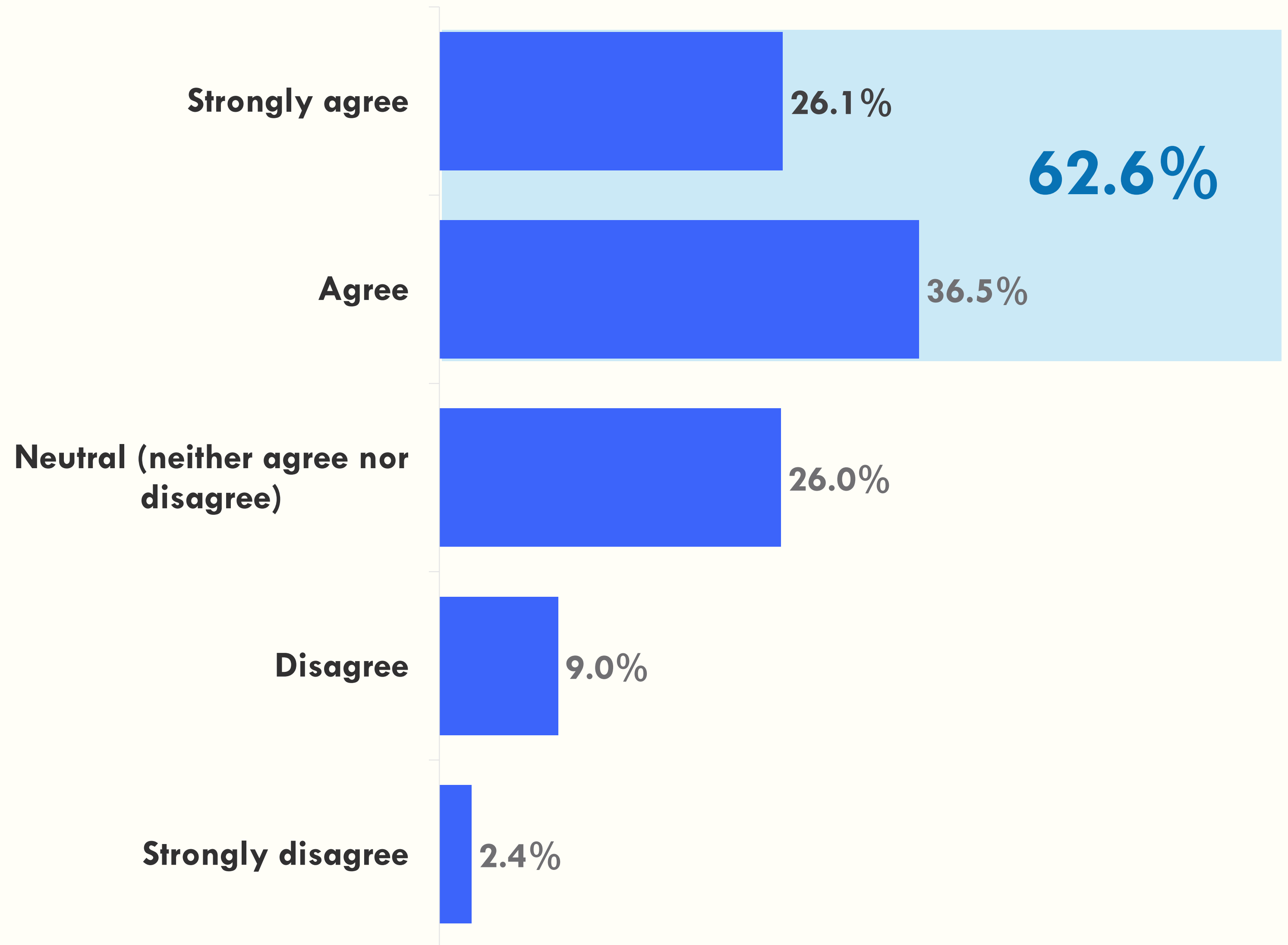
Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



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

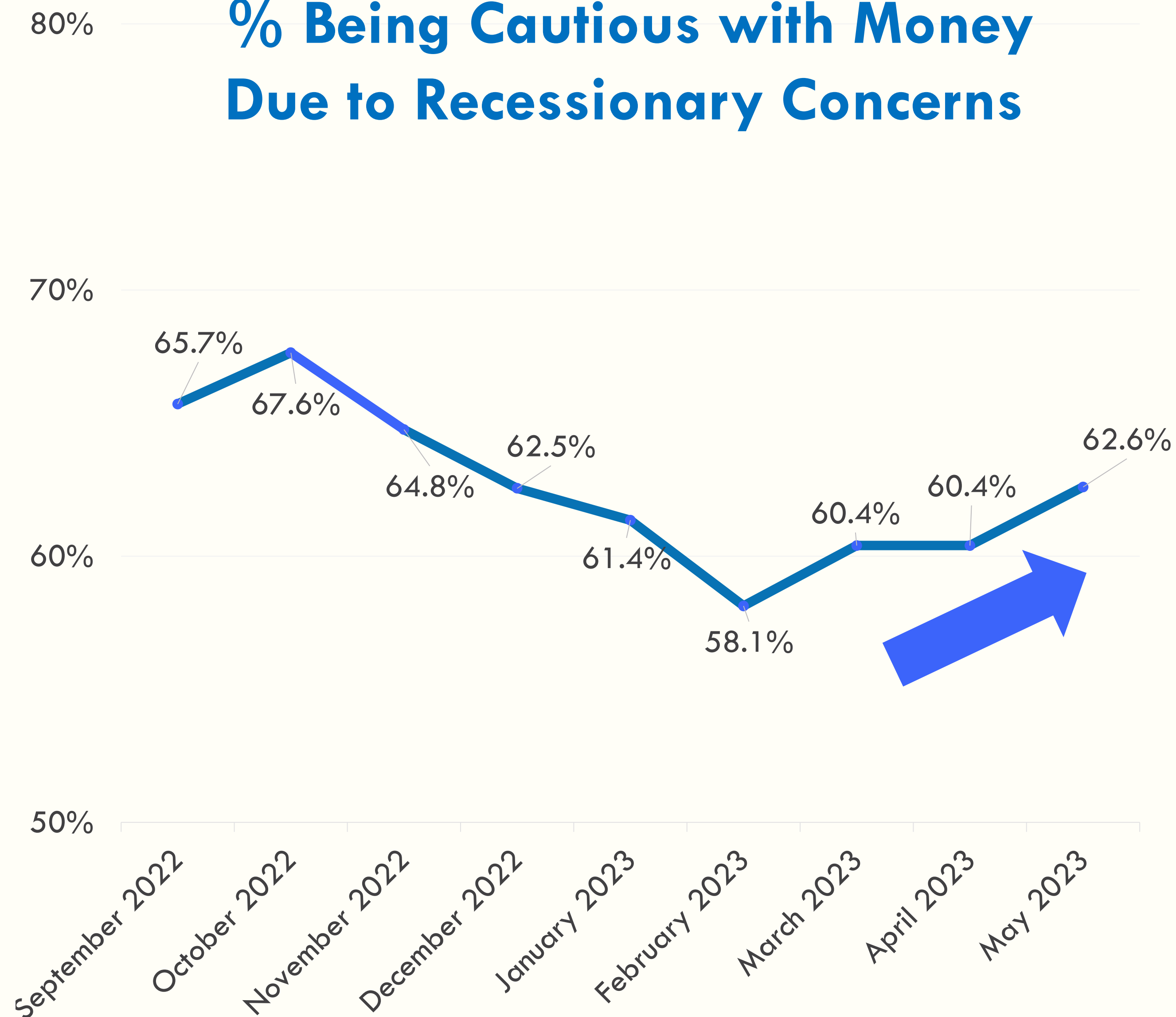
Question:

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



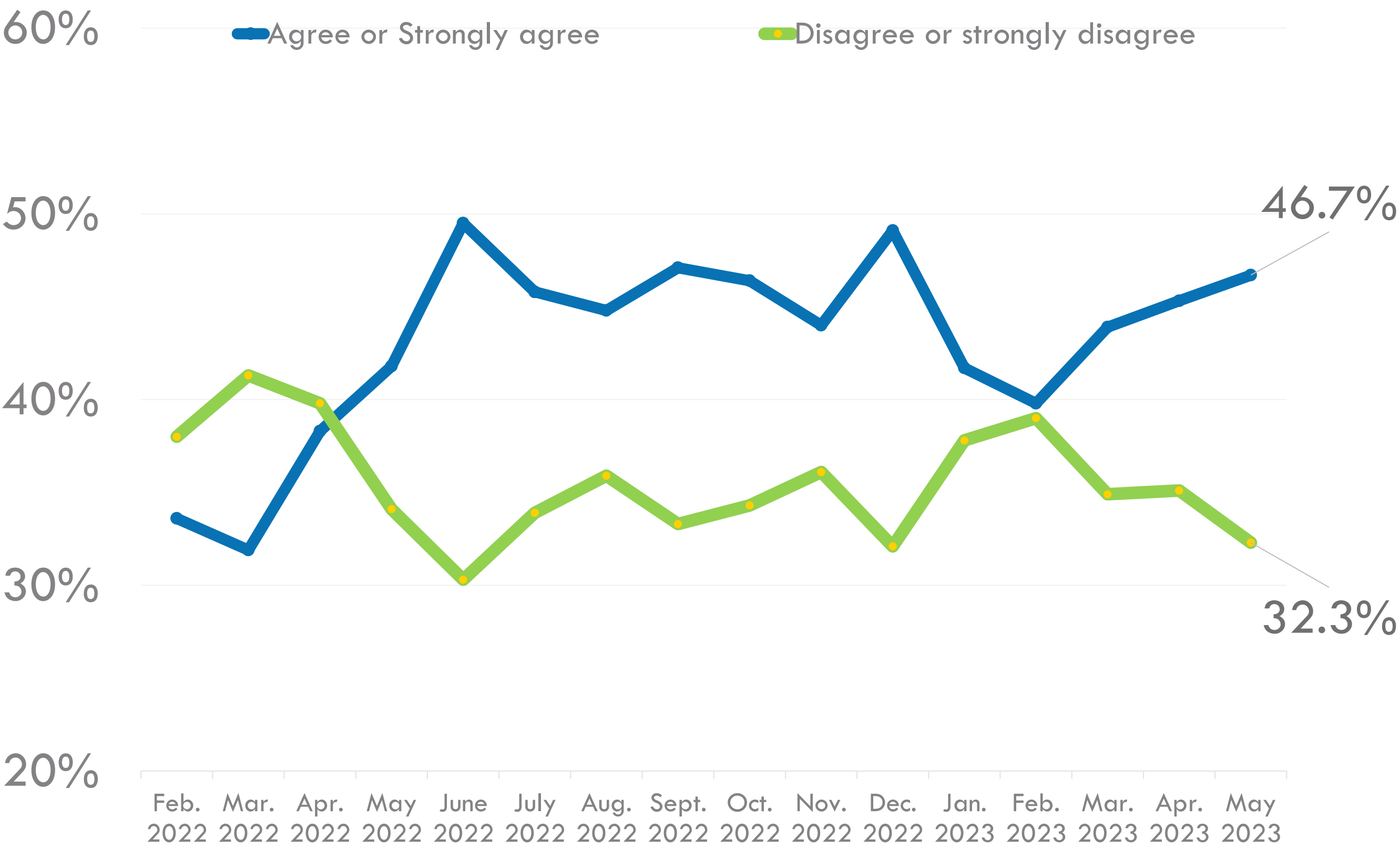
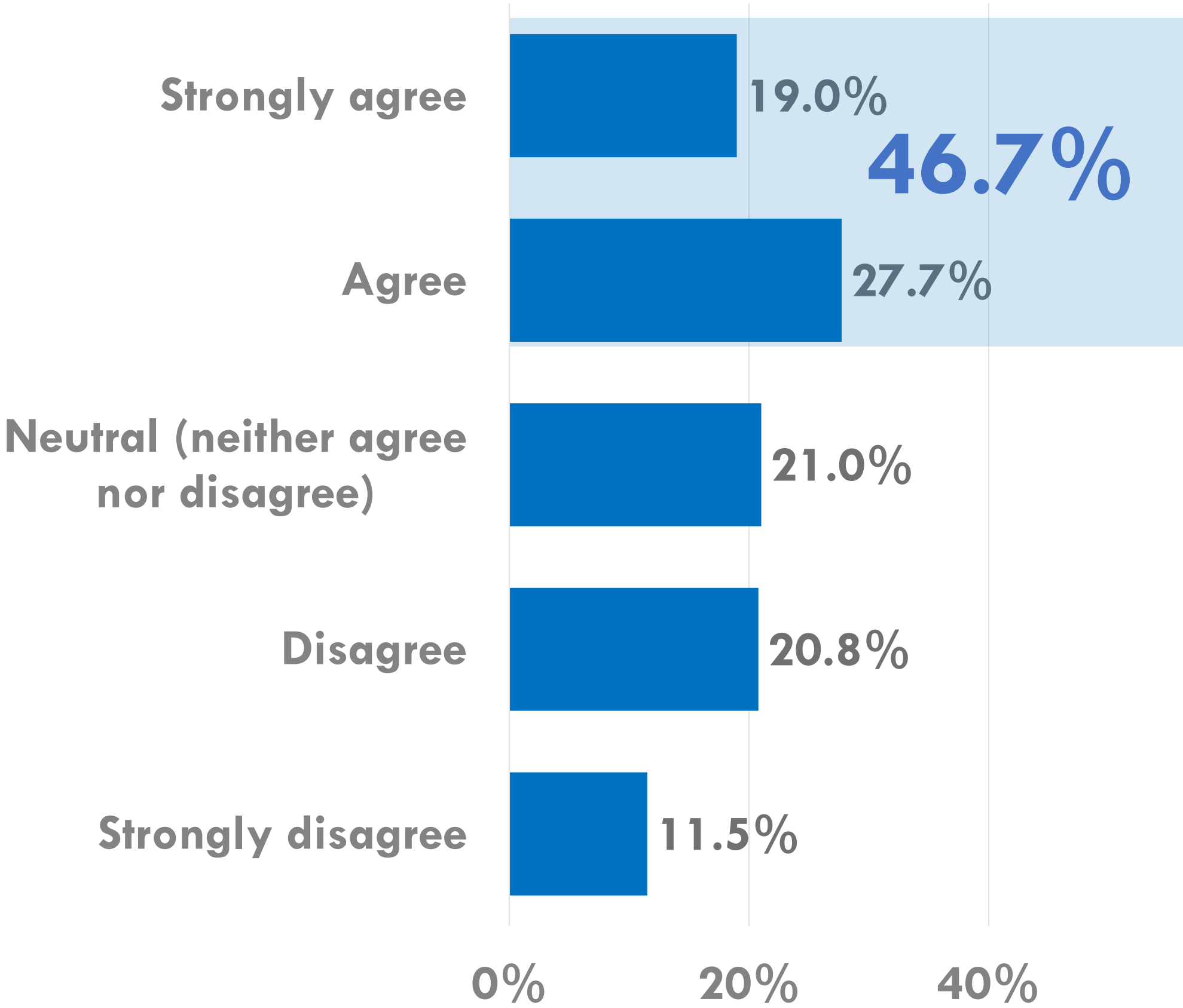
(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)

% Being Cautious with Money Due to Recessionary Concerns

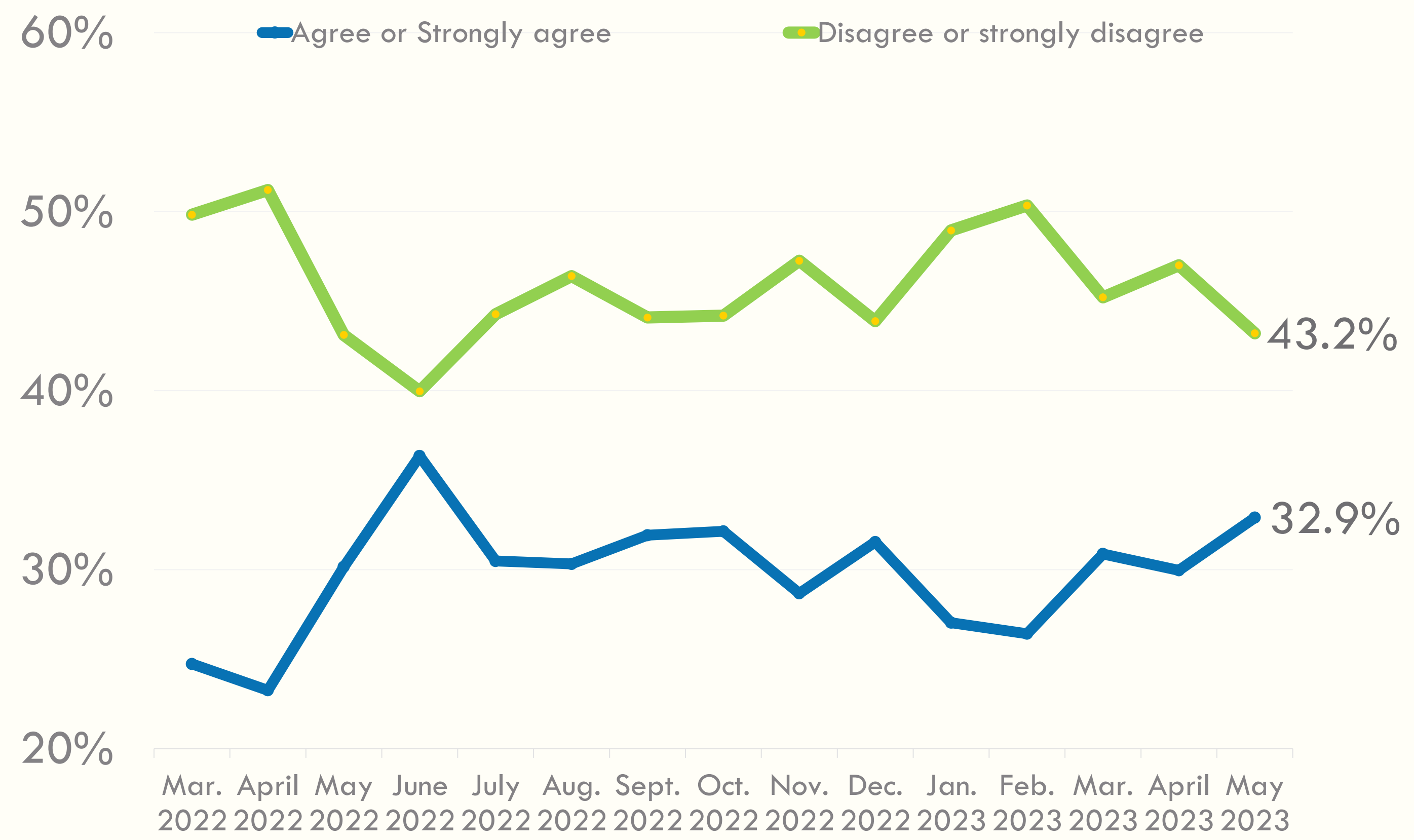
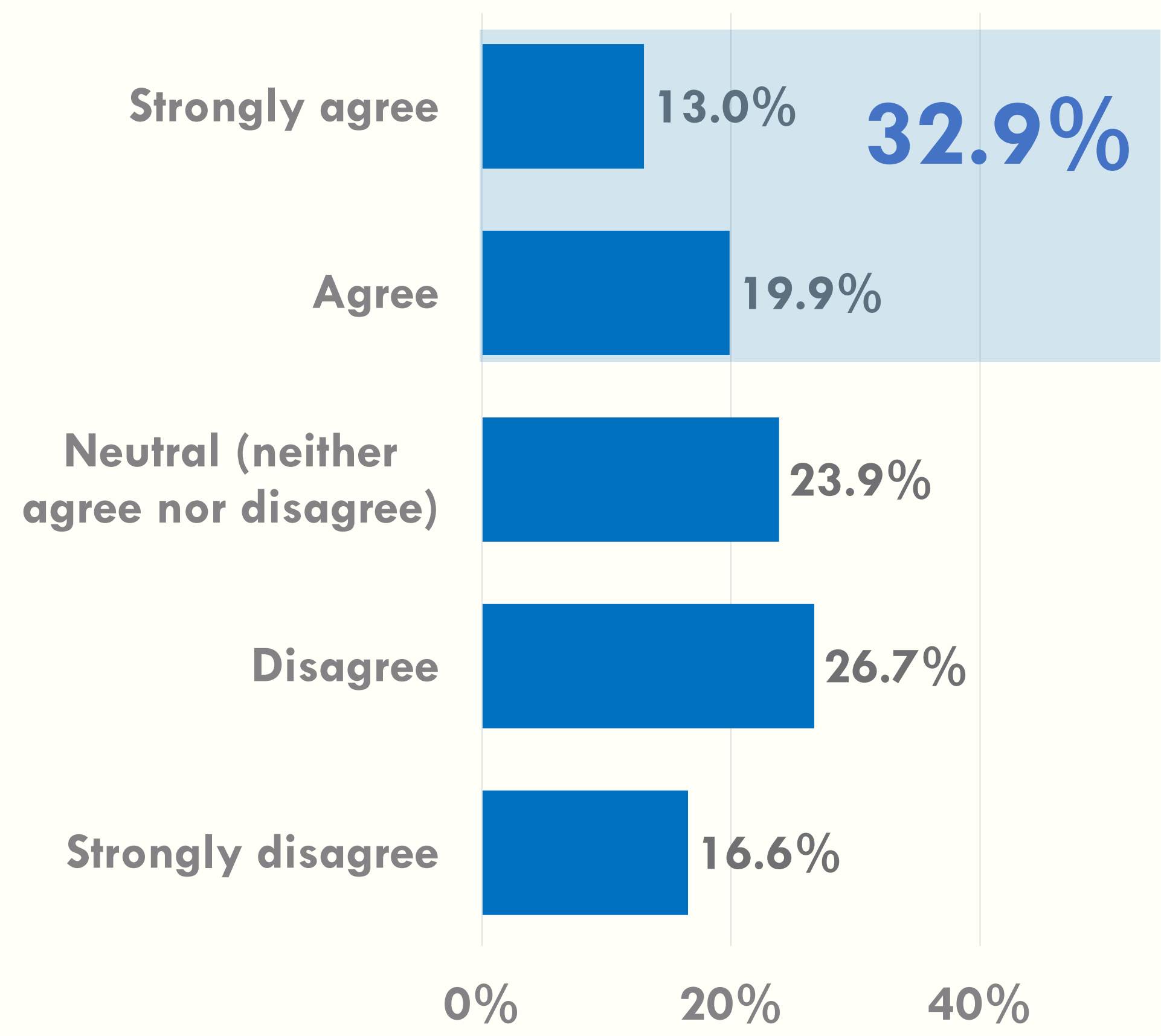


More travelers
are exercising
spending caution
due these
recessionary
concerns.

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.

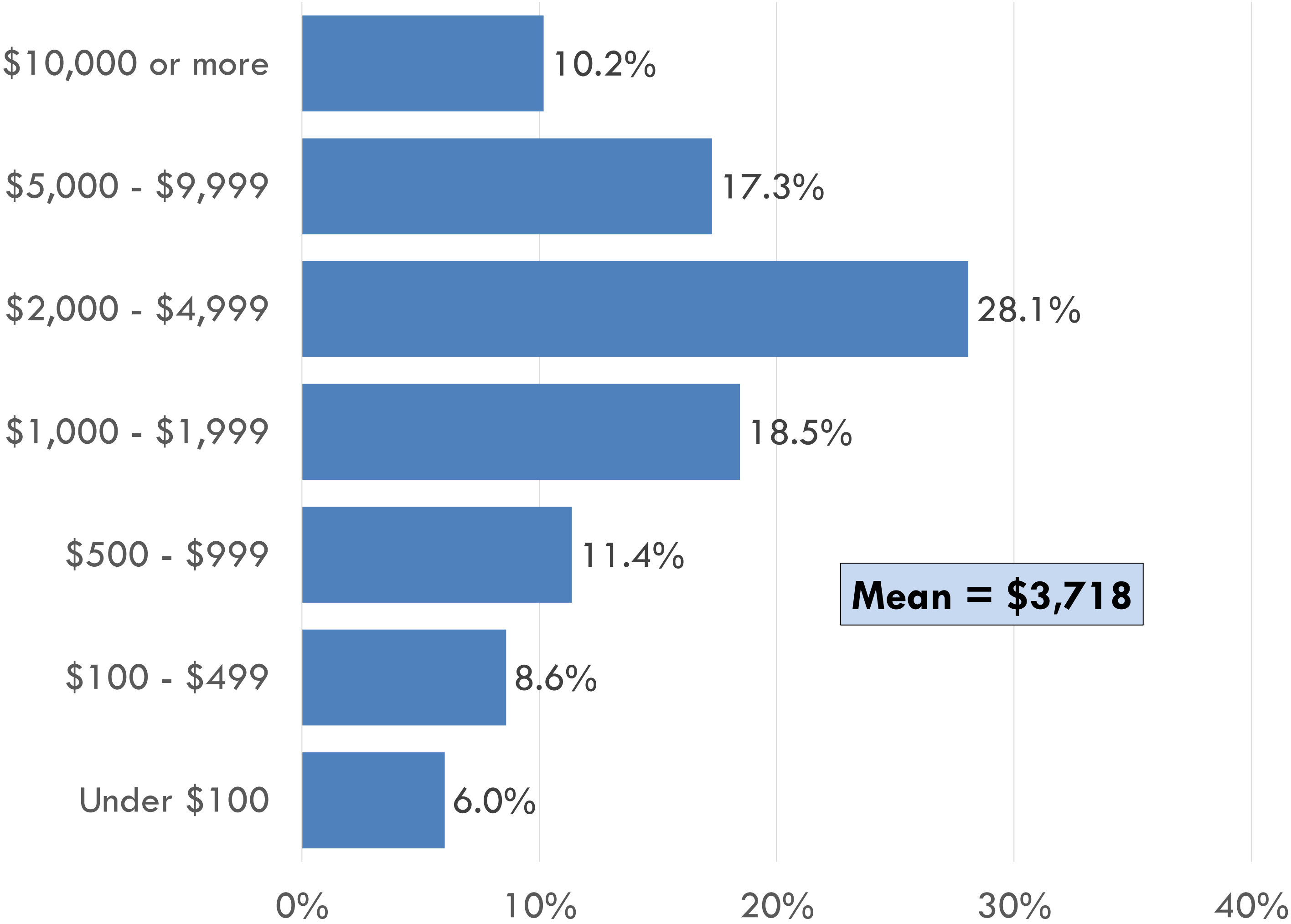


MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS

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, 4,180 completed surveys.
Data collected May 17-21, 2023.)*

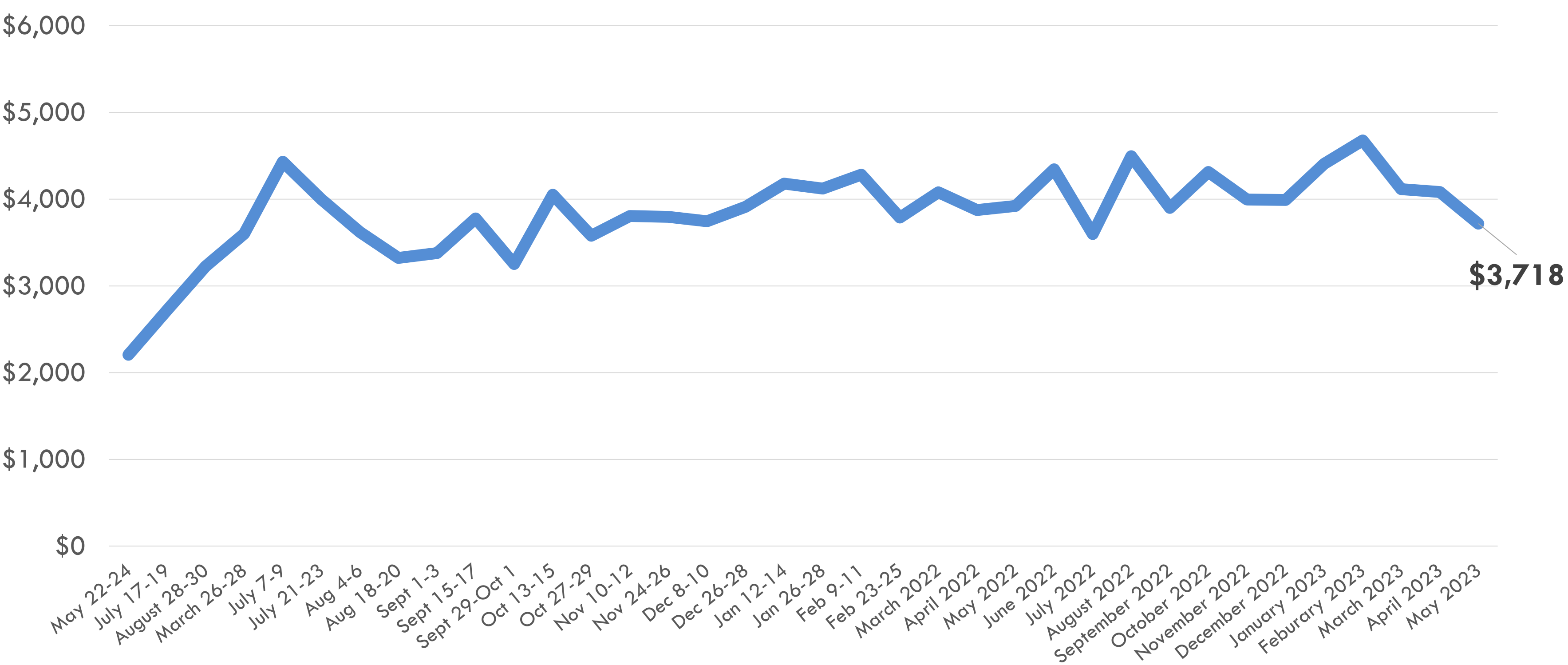


MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS—TIME SERIES

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?

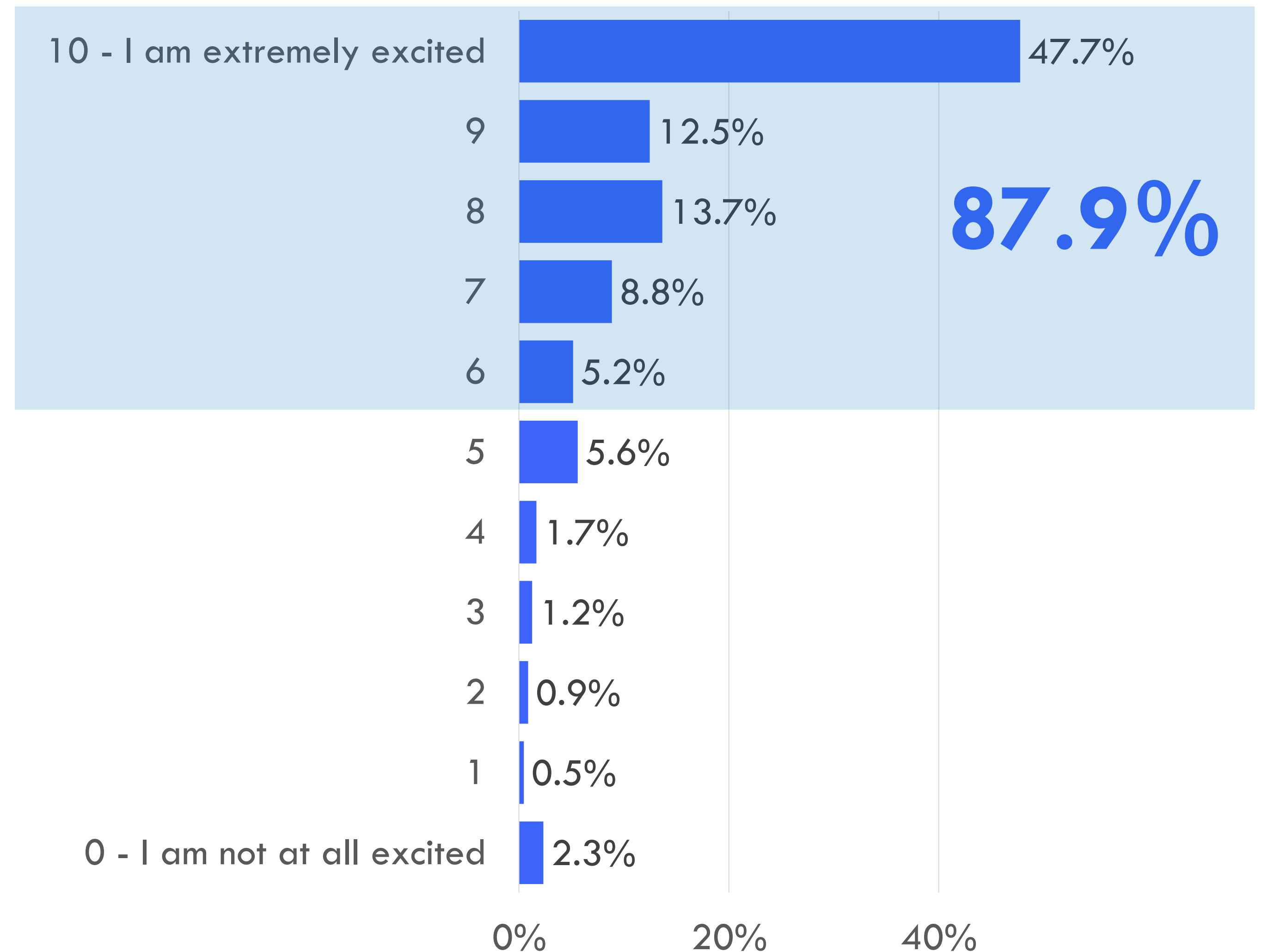
Maximum I would spend on leisure travel (next 12 months):

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



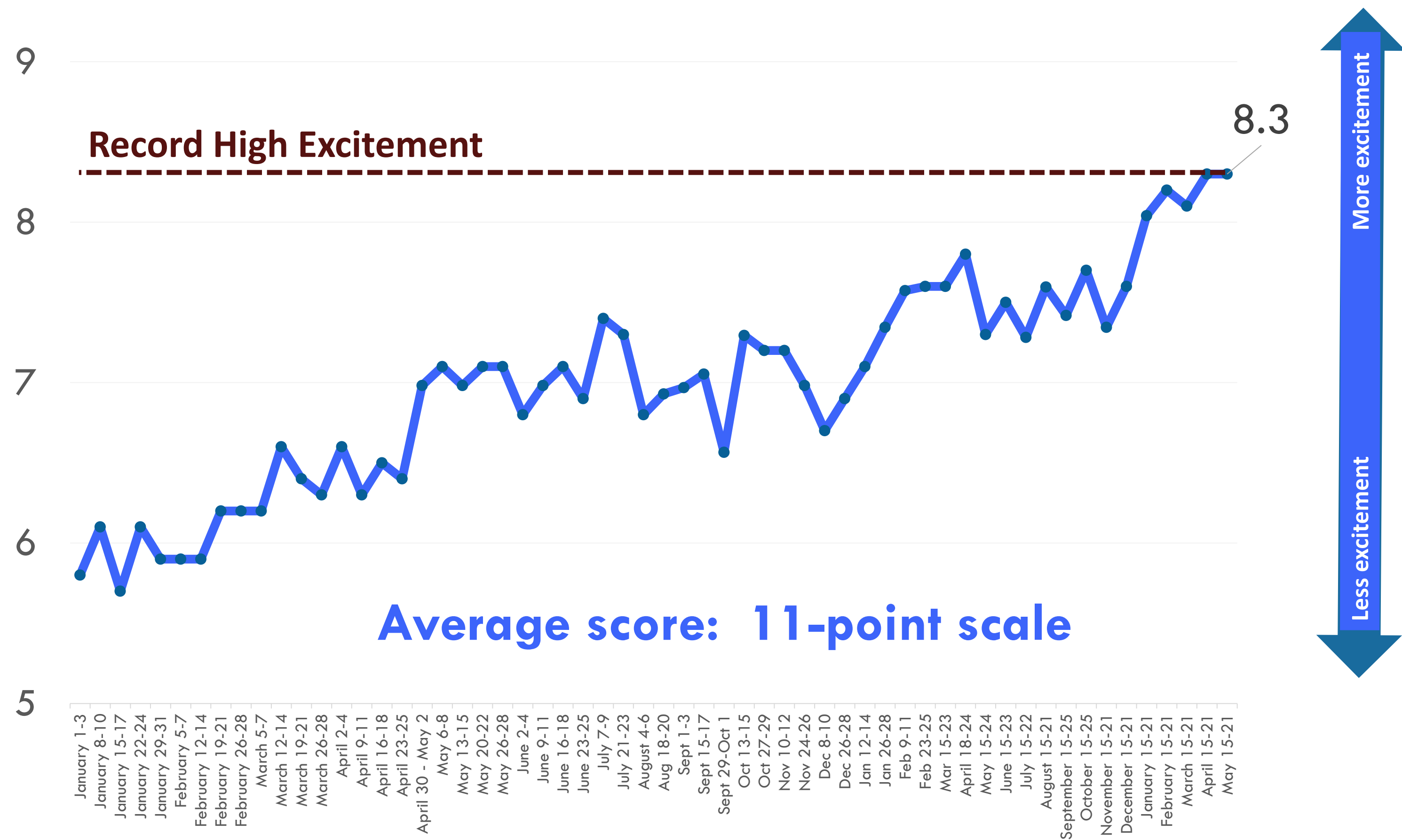
Question:

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, 4,180 completed surveys. Data collected May 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)

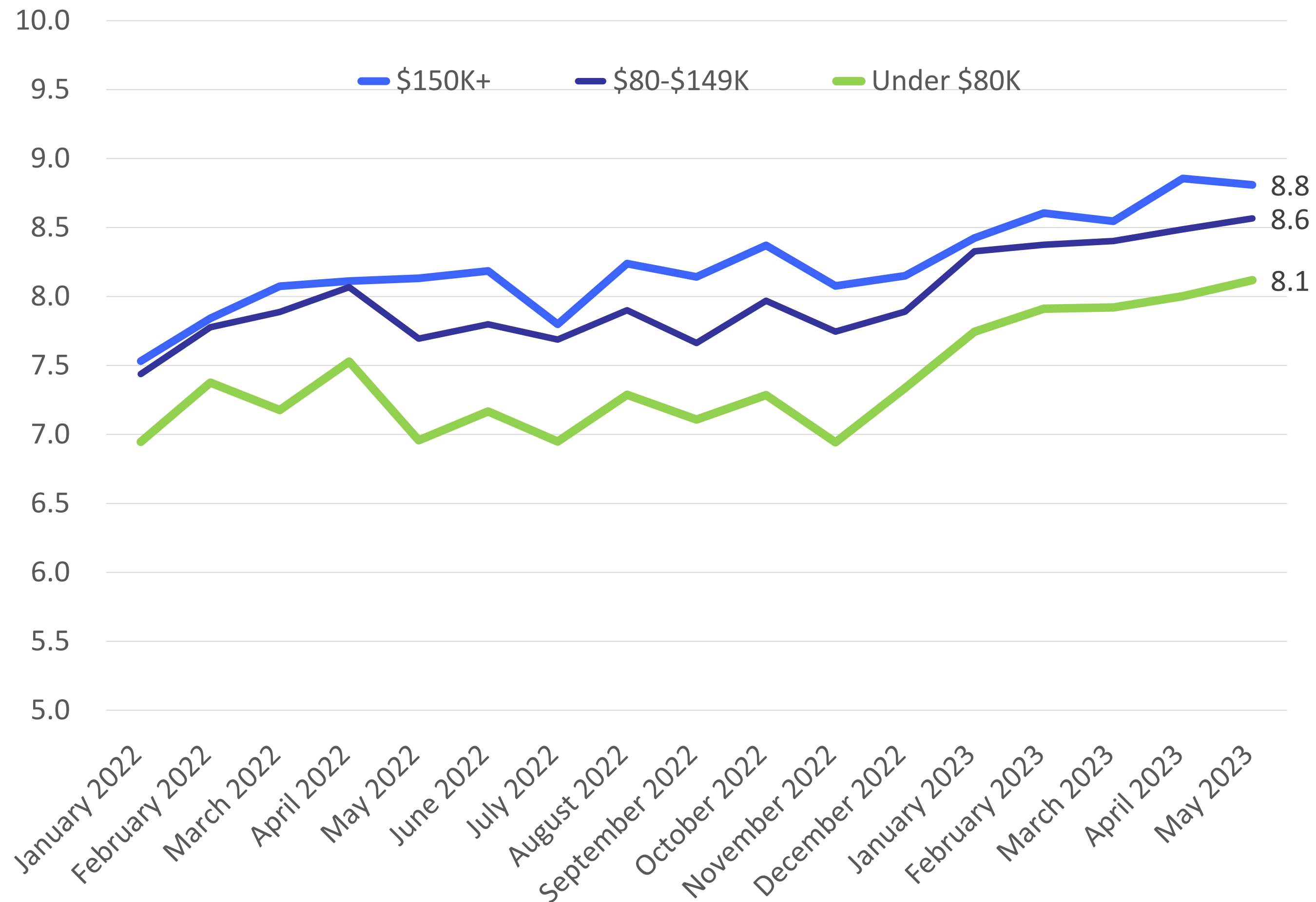


Average score: 11-point scale

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)

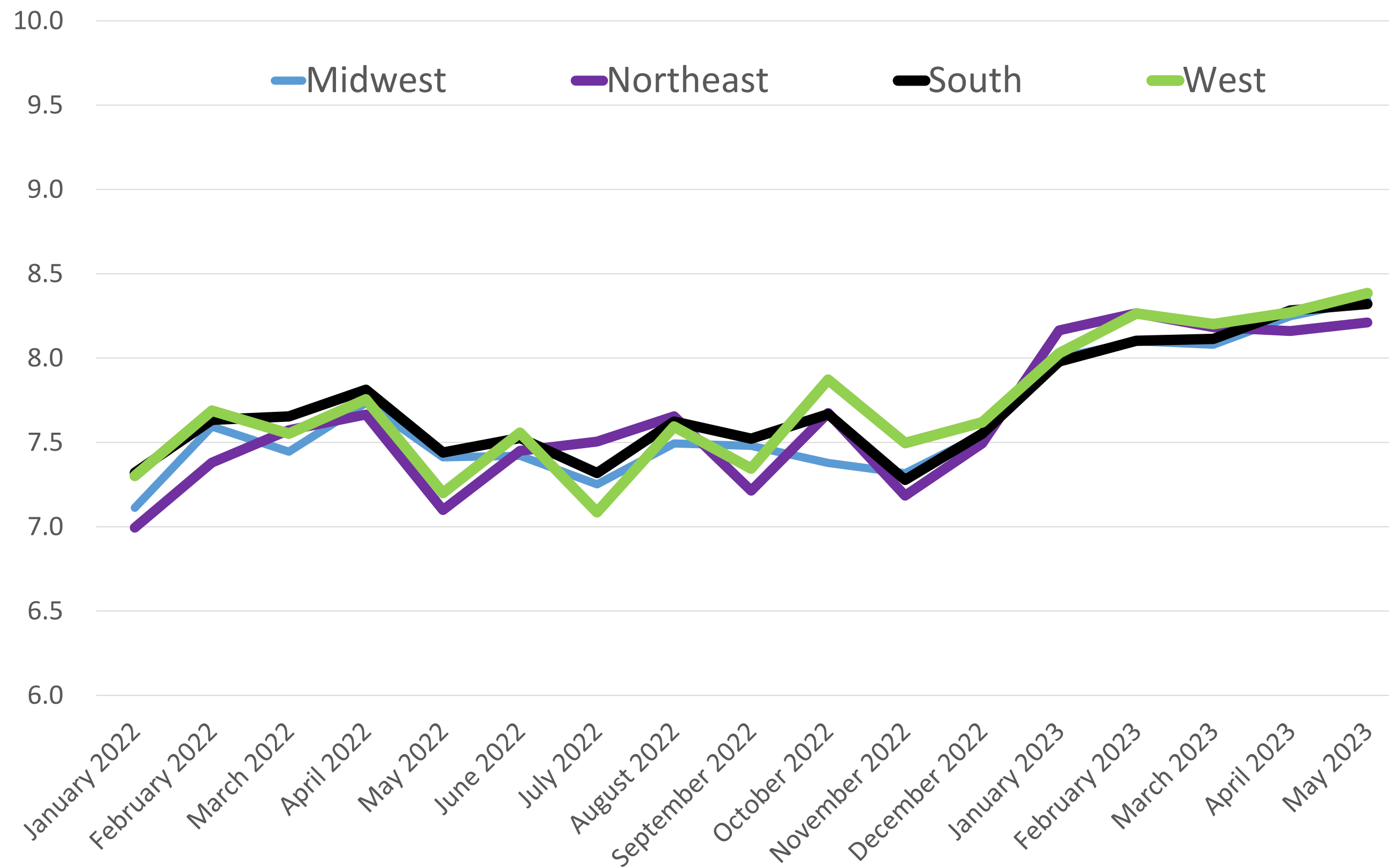
Annual Household Income



Average score: 11-point scale

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

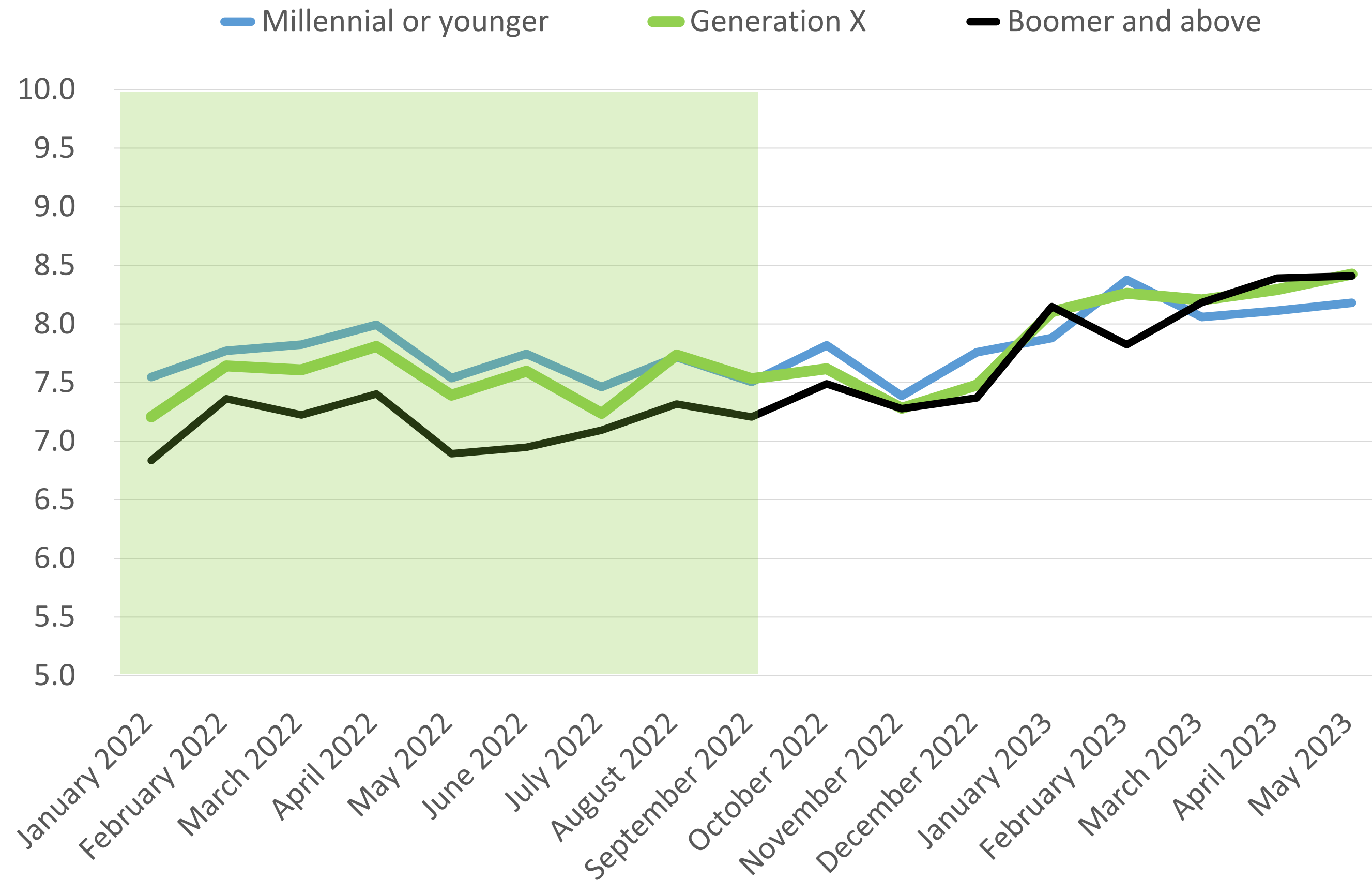
Region



Average score: 1-10 point scale

Across all regions,
excitement for
leisure travel
remains high.

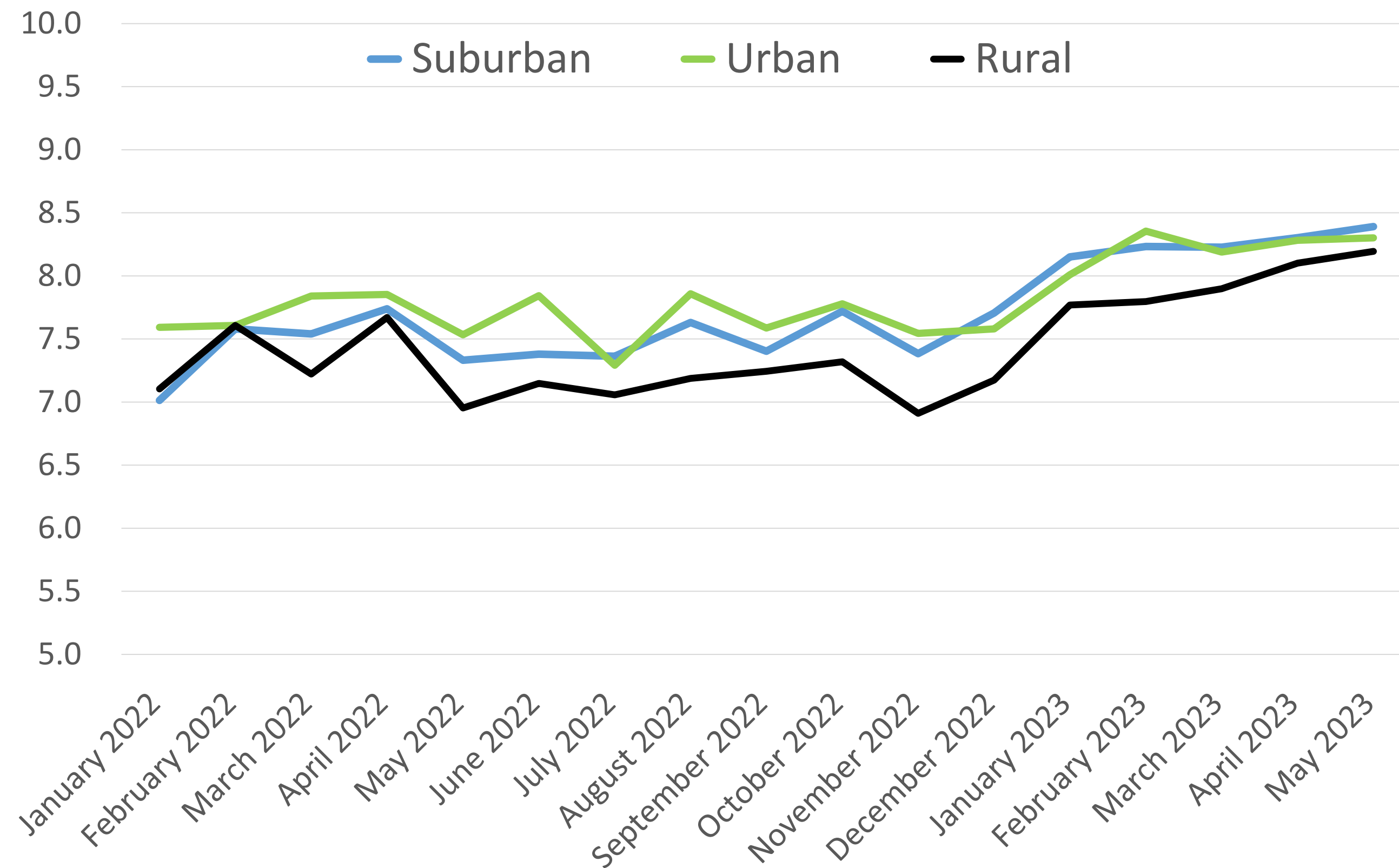
Generation



Average score: 11-point scale

Older travelers
show high levels of
excitement for
travel.

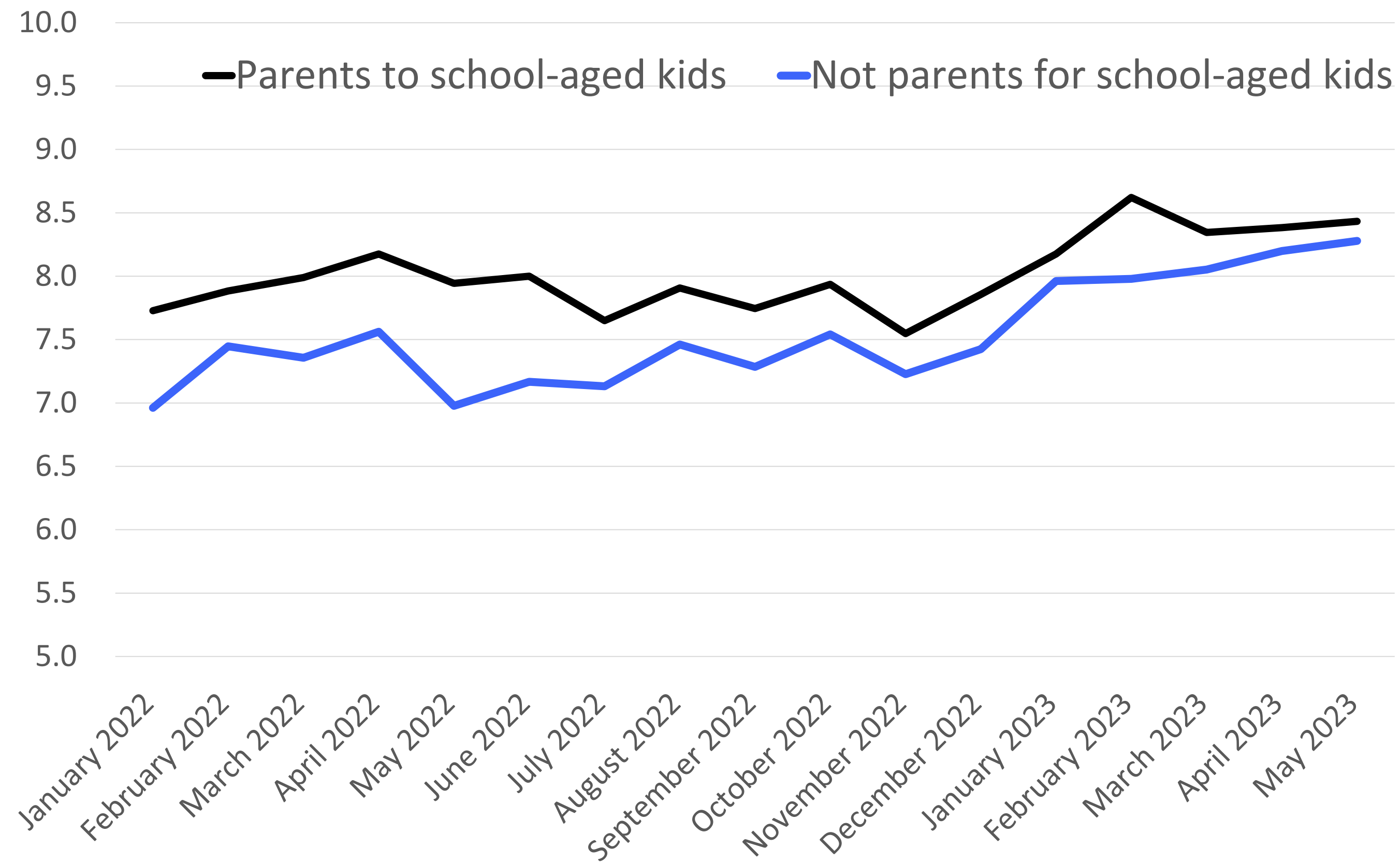
Place of Residence



Average score: 1-10 point scale

Residents of rural areas continue to shower lesser degrees of travel enthusiasm.

Parental Status



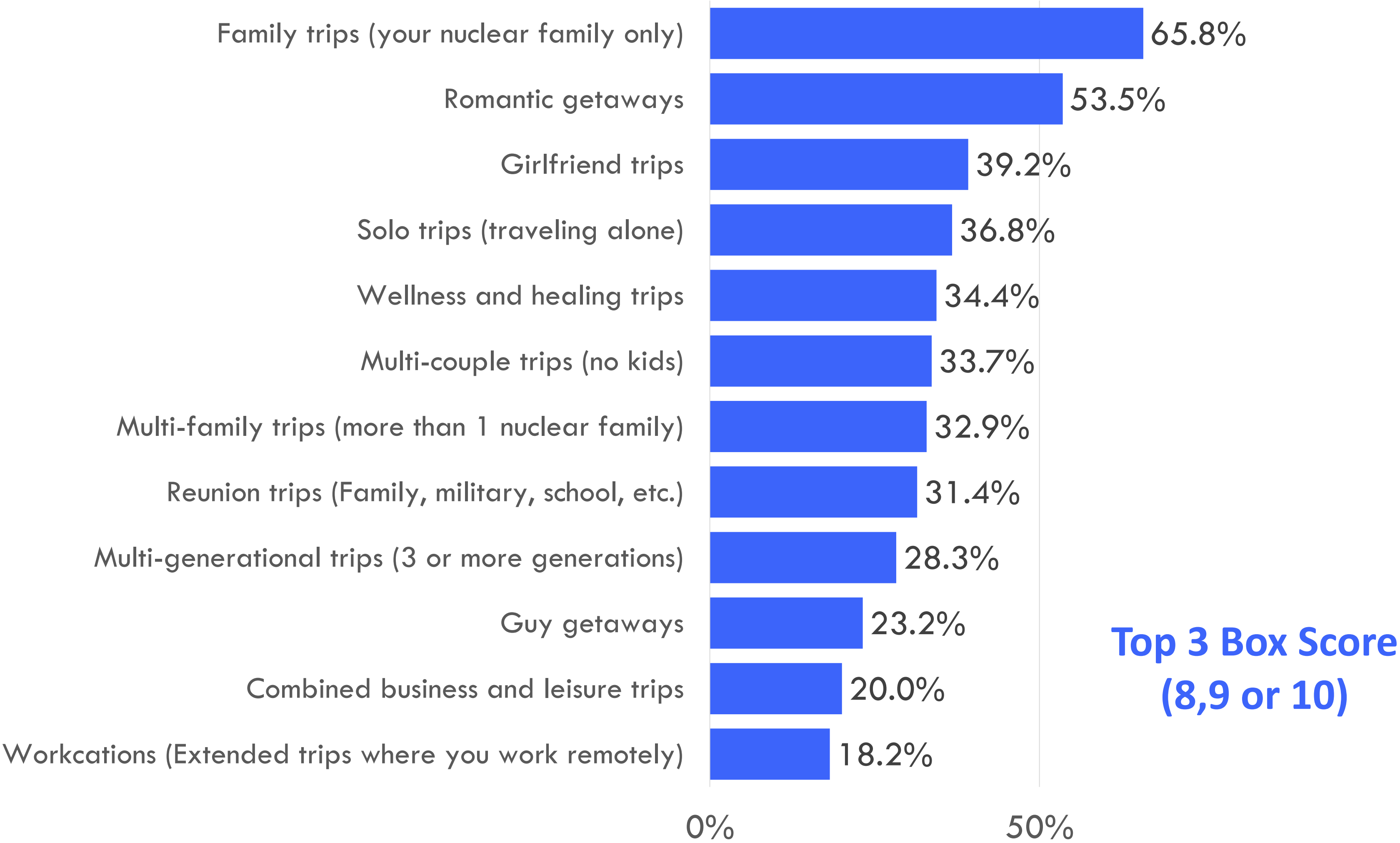
Average score: 11-point scale

Families travel excitement remains high.

EXCITEMENT FOR TRIP TYPES

Question: Thinking carefully about THE NEXT TWELVE (12) MONTHS. Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to take each of these types of trips?

*(Base: All respondents, 4,180 completed survey
Data collected May 17-21, 2023.)*



TRAVEL SENTIMENT INDICES

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

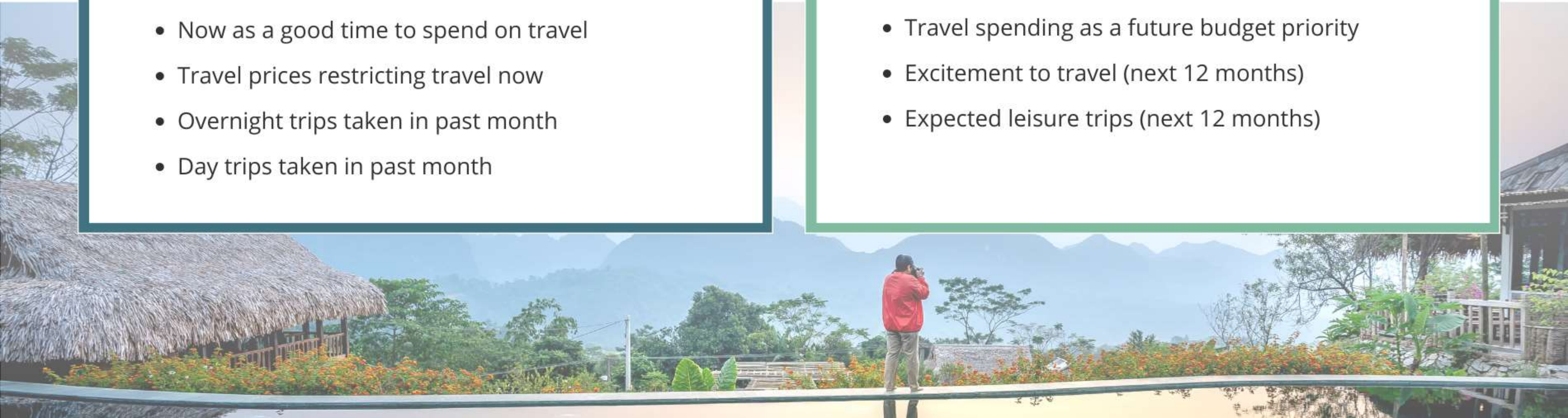
Index values are calculated by combining key questions.

Current Travel Sentiment Index:

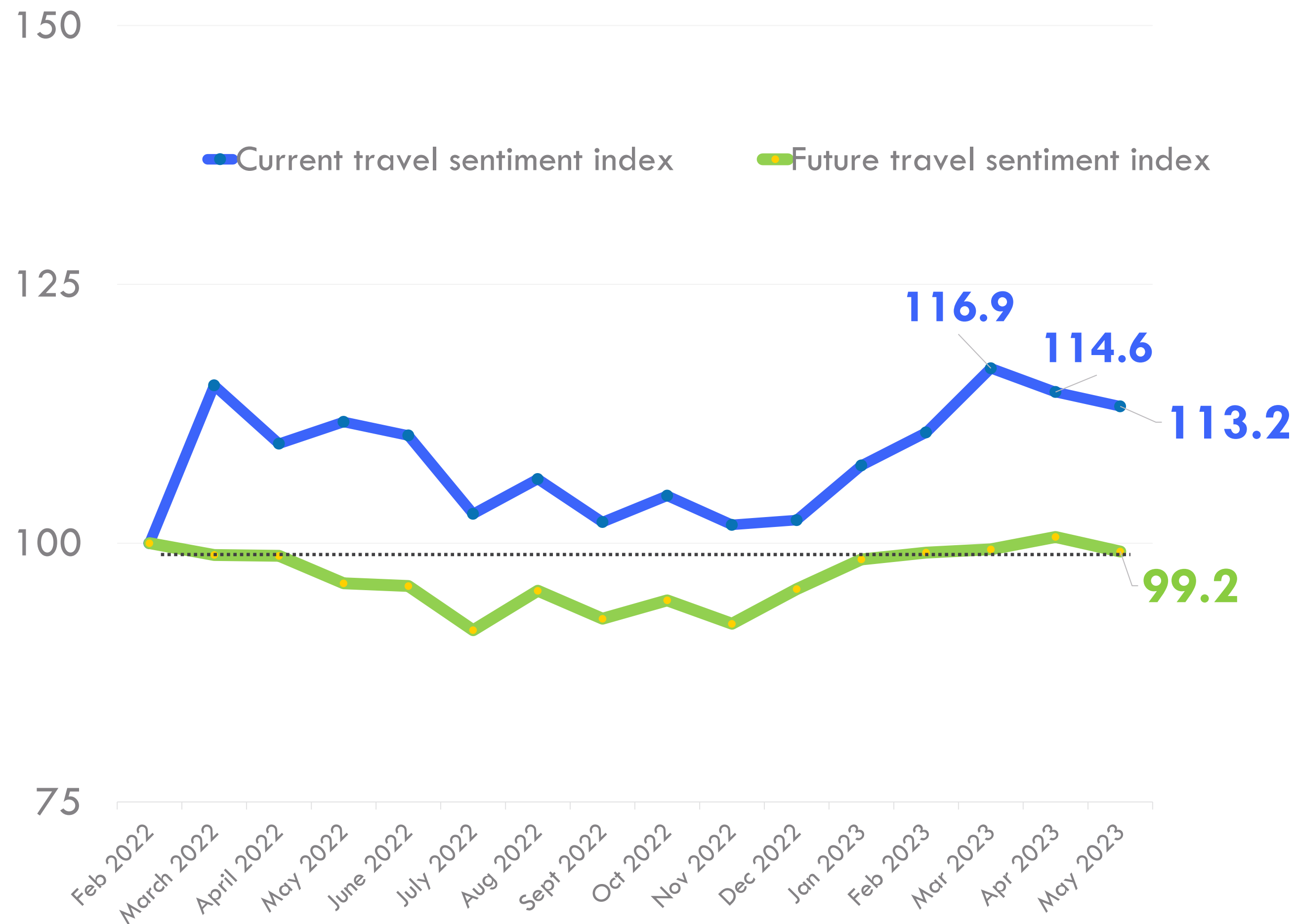
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

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.

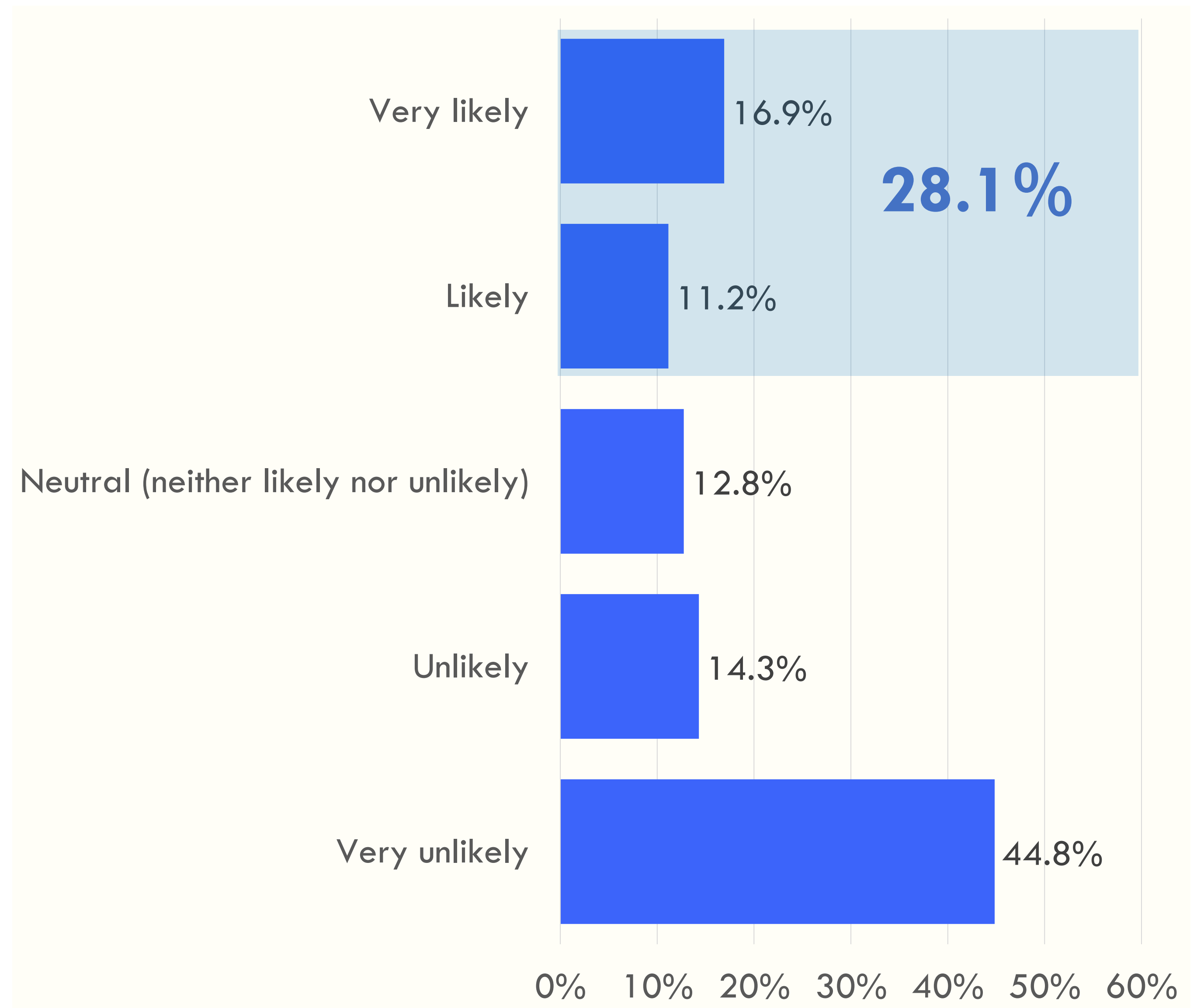
- Current travel enthusiasm has been regressing in the past 2 months.
- Expectations for future travel is down very slightly this month, but stands virtually unchanged from one year ago.

A person stands on a rocky shore at sunset, looking out at the ocean. The sky is filled with colorful clouds, and the sun is low on the horizon. The person is silhouetted against the bright sky. The foreground shows dark, wet rocks and the calm water of the sea. The background features a steep, mossy cliff on the left and a bright orange and blue sky with scattered clouds. The overall mood is serene and contemplative.

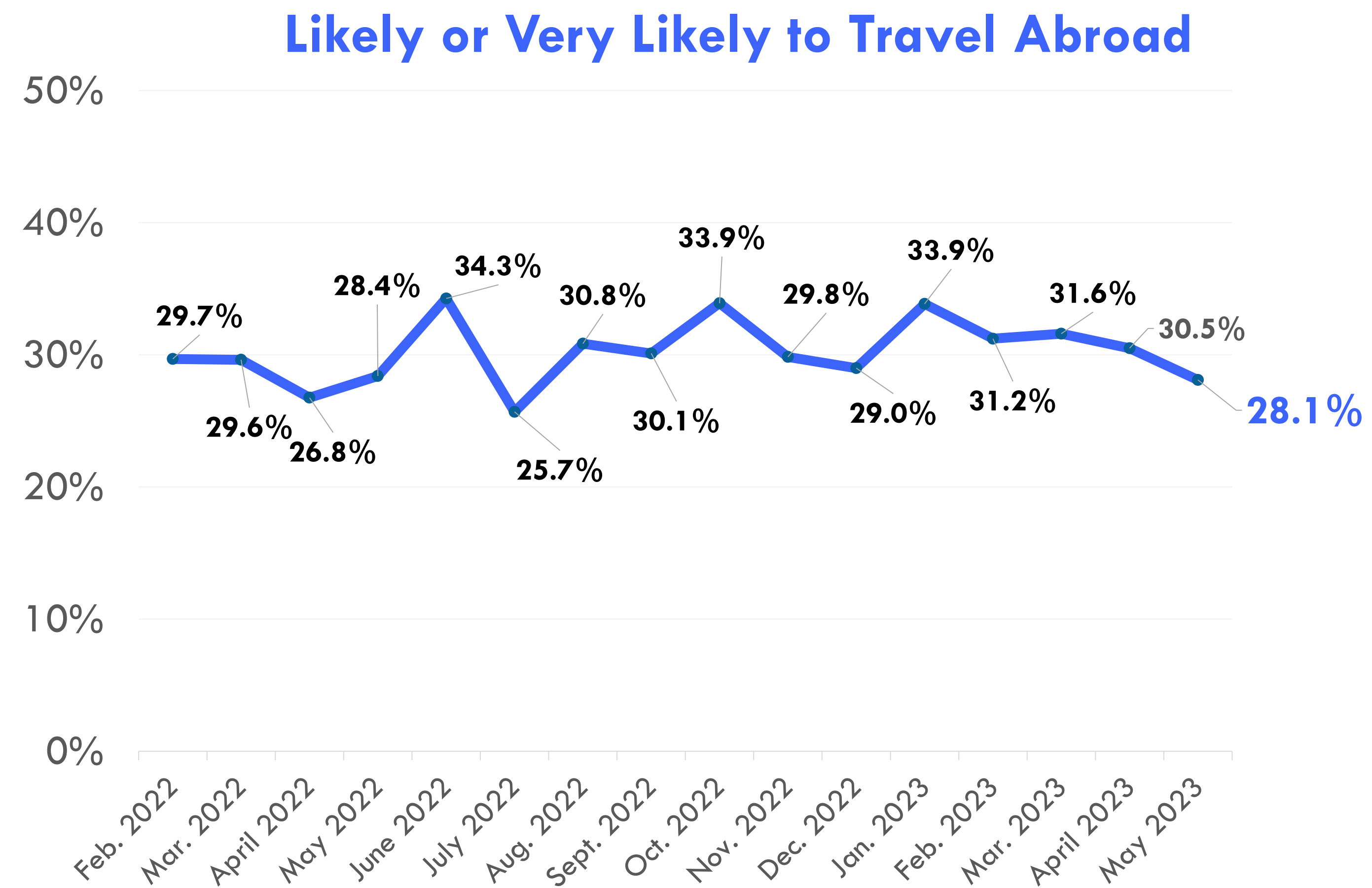
INTERNATIONAL TRAVEL

Question:

How likely are you to travel outside the United States for leisure 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**?



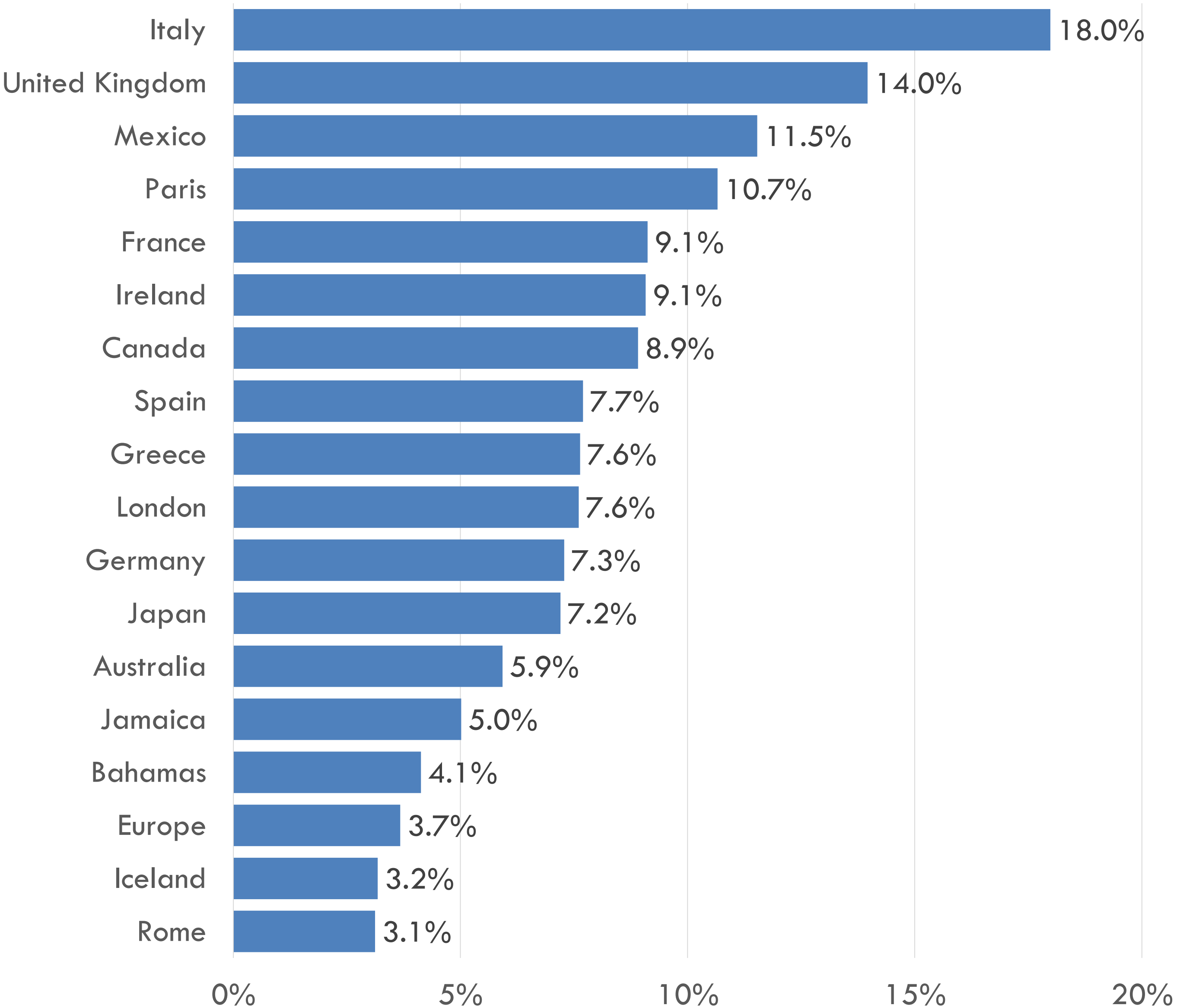
Expectations for travel outside the United States have been moving slowly downward this year.

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

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

(Please only include destinations outside the United States)

*(Base: All respondents, 2,418 completed surveys.
Data collected May 17-18, 2023.)*

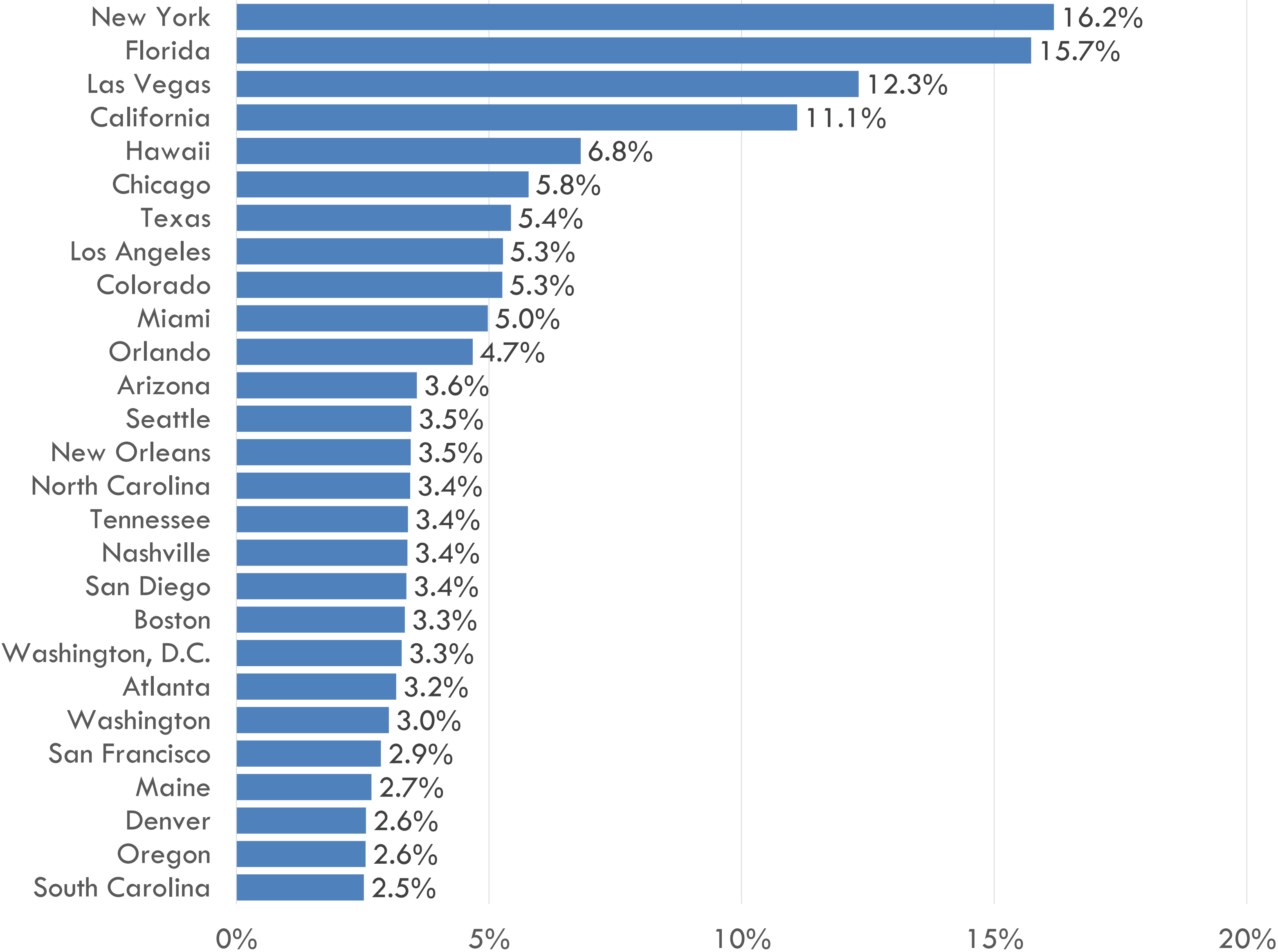


MOST DESIRED DOMESTIC DESTINATIONS IN THE NEXT 12 MONTHS (UNAIDED)

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

(Please only include destinations in the United States)

(Base: All respondents, 3,749 completed surveys.
Data collected May 17-18, 2023.)





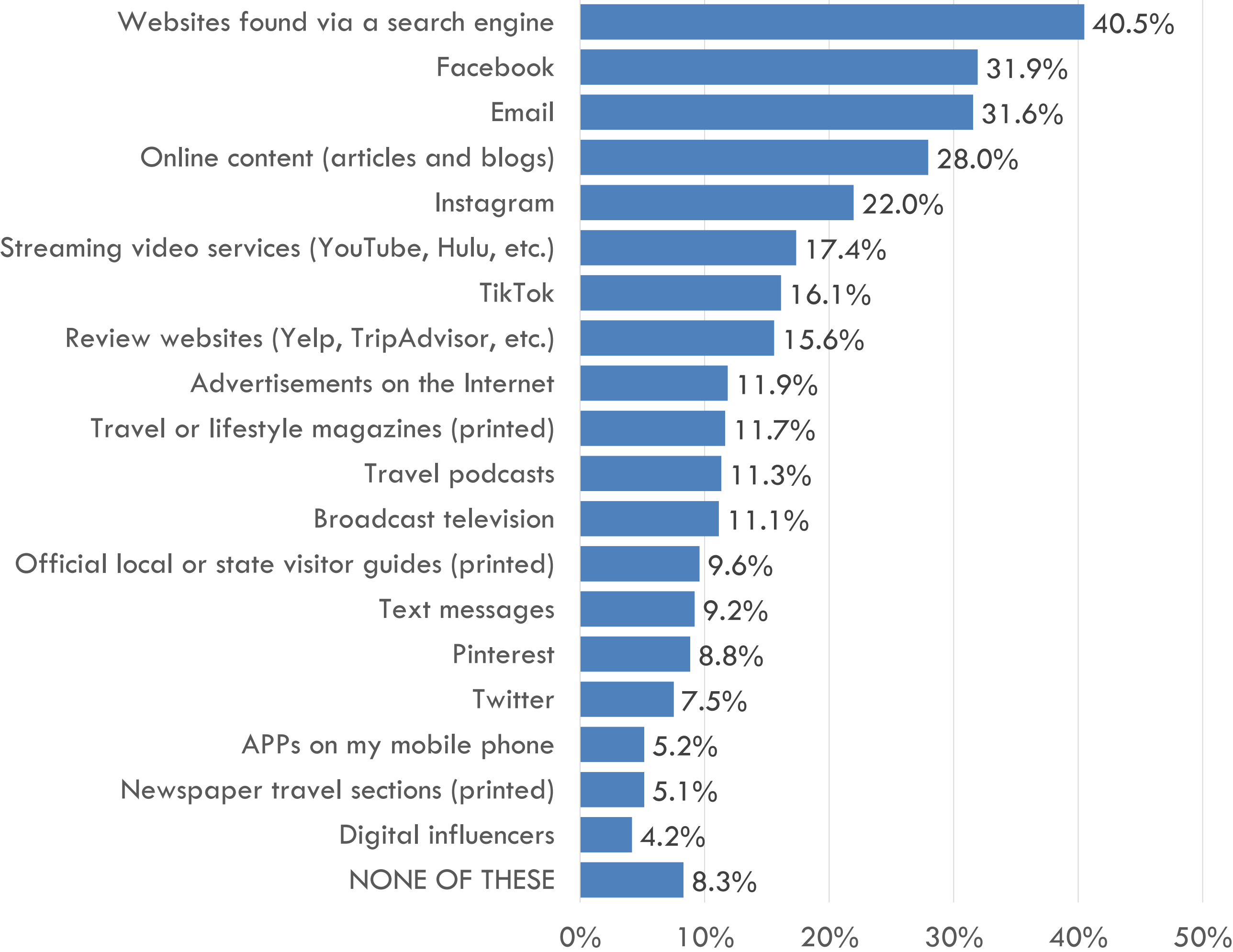
Marketing **TRAVEL**

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)

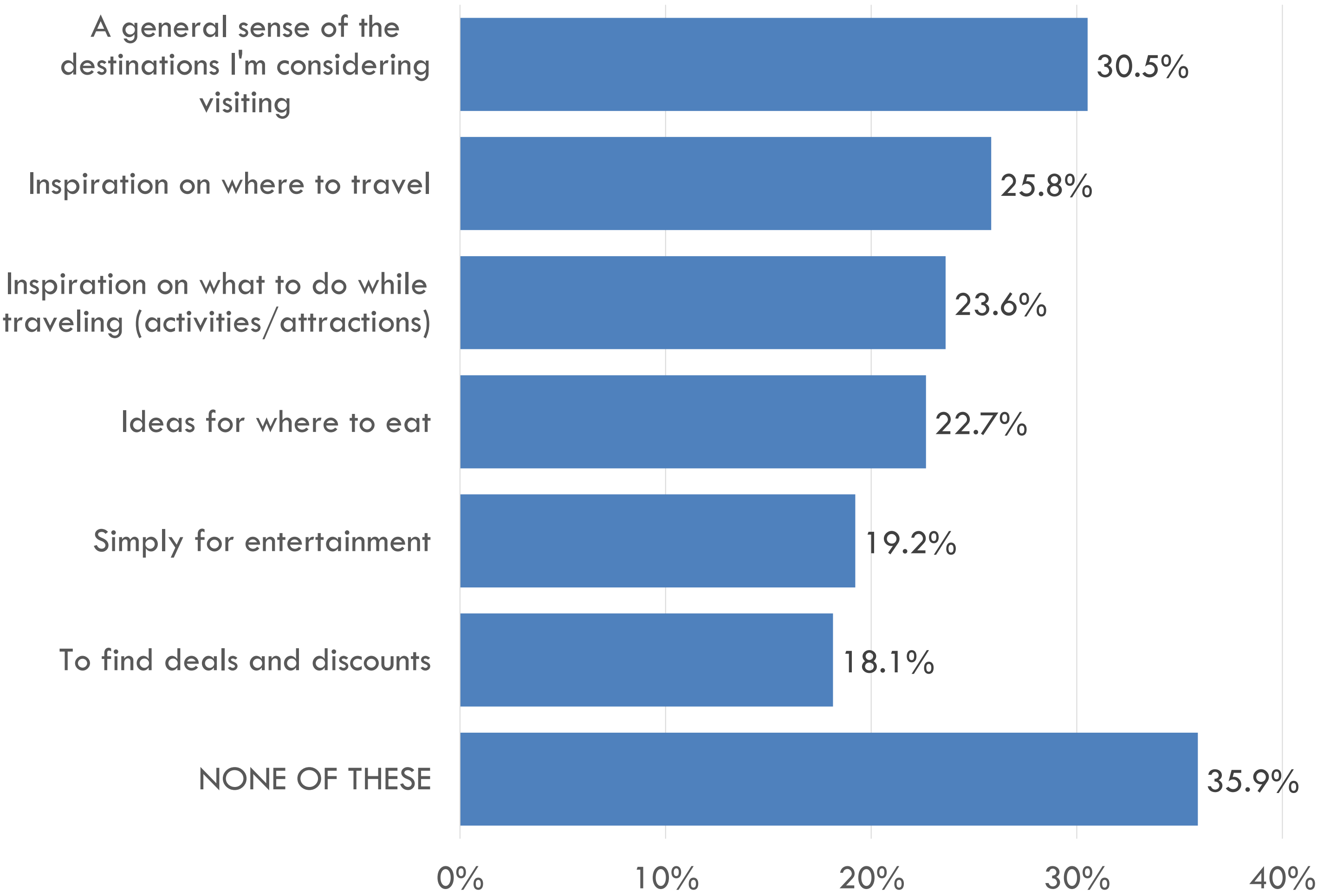
(Base: All respondents, 4,180 completed surveys.
Data collected May 17-18, 2023.)



METHOD OF ONLINE VIDEO USE FOR TRAVELS

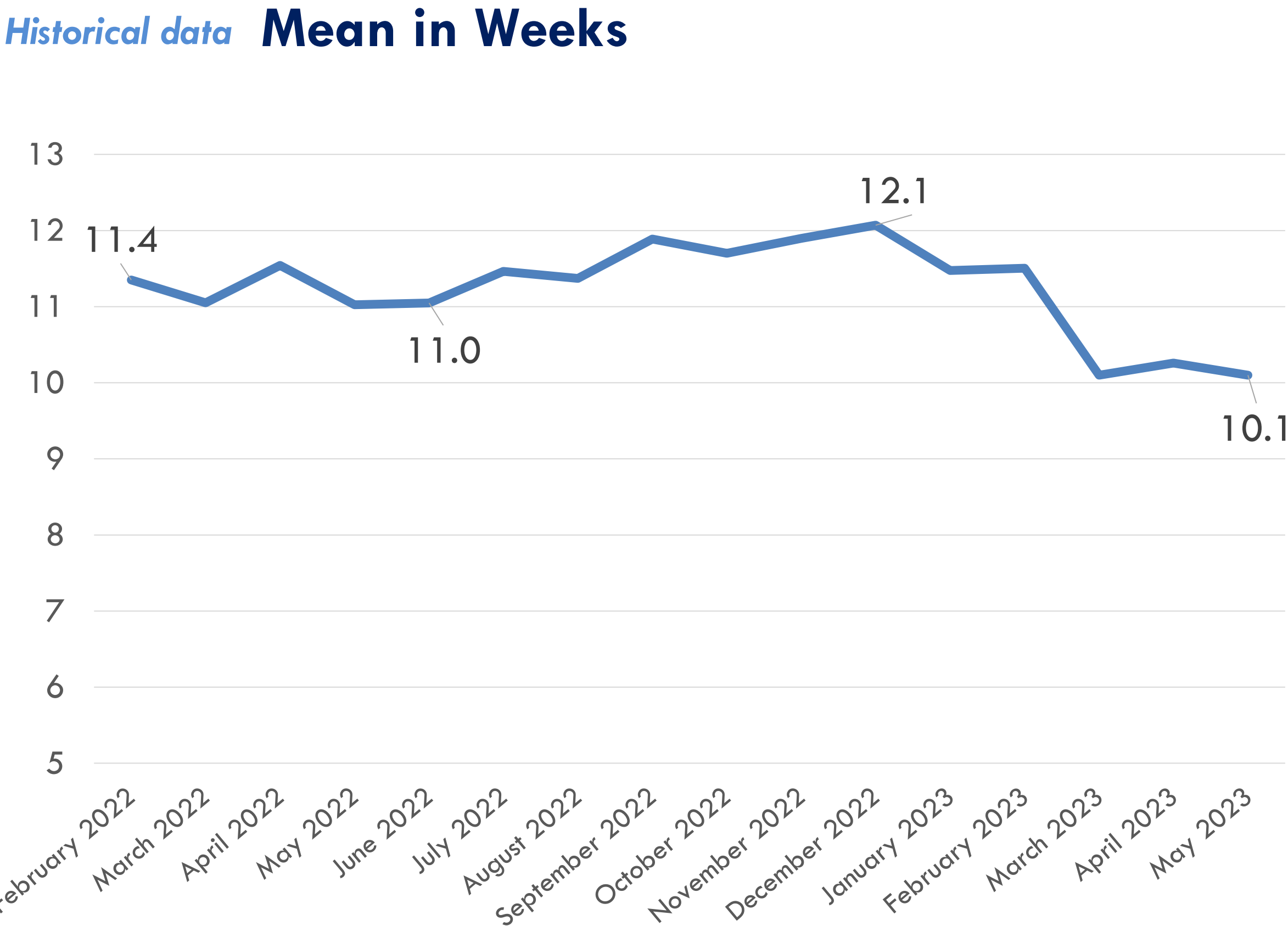
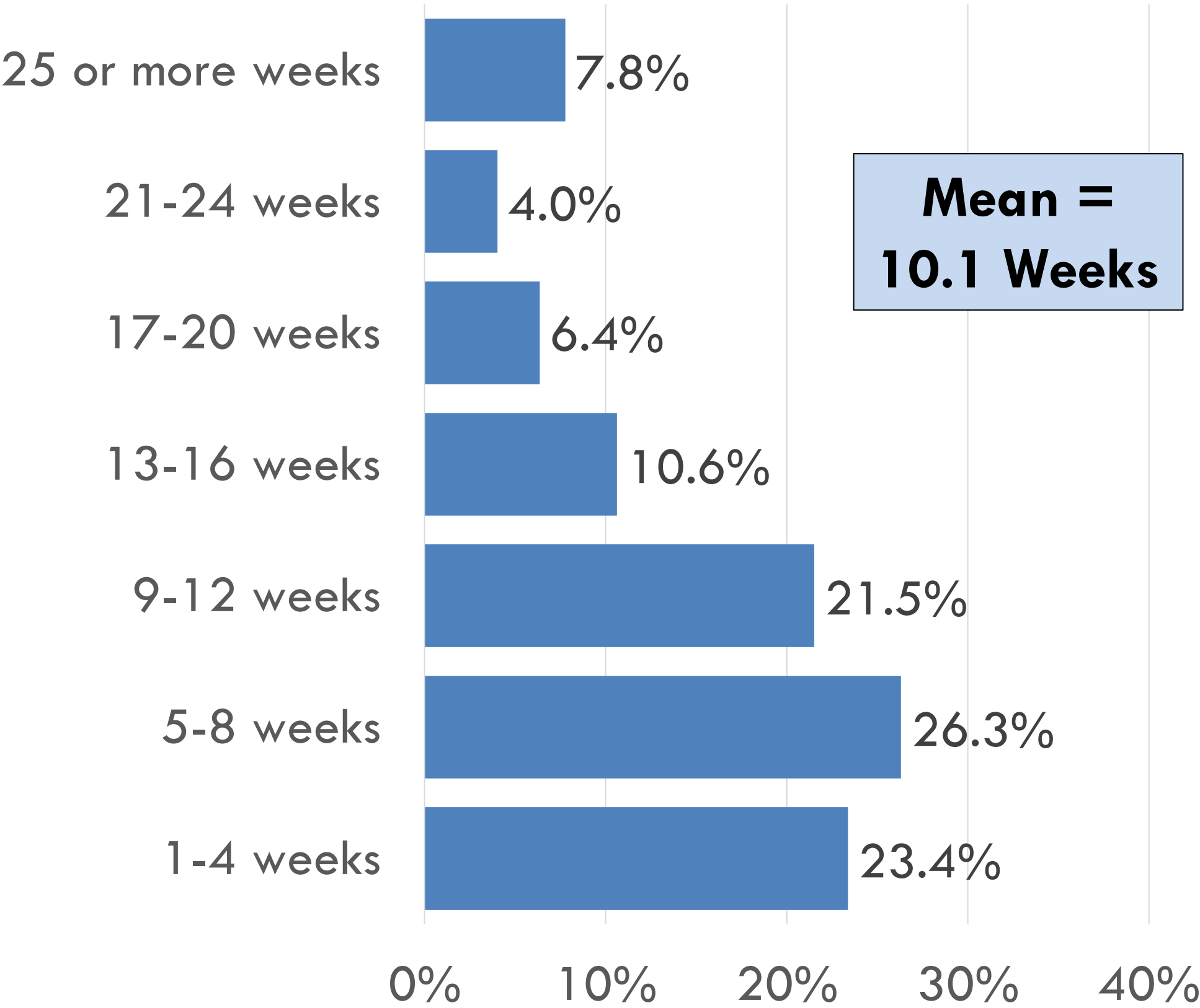
Question: How do you generally use online video for helping with your travels? (Select all that accurately complete the sentence)

(Base: All respondents, 4,180 completed surveys. Data collected May 17-18, 2023.)



PLANNING WINDOW FOR DOMESTIC LEISURE TRAVEL

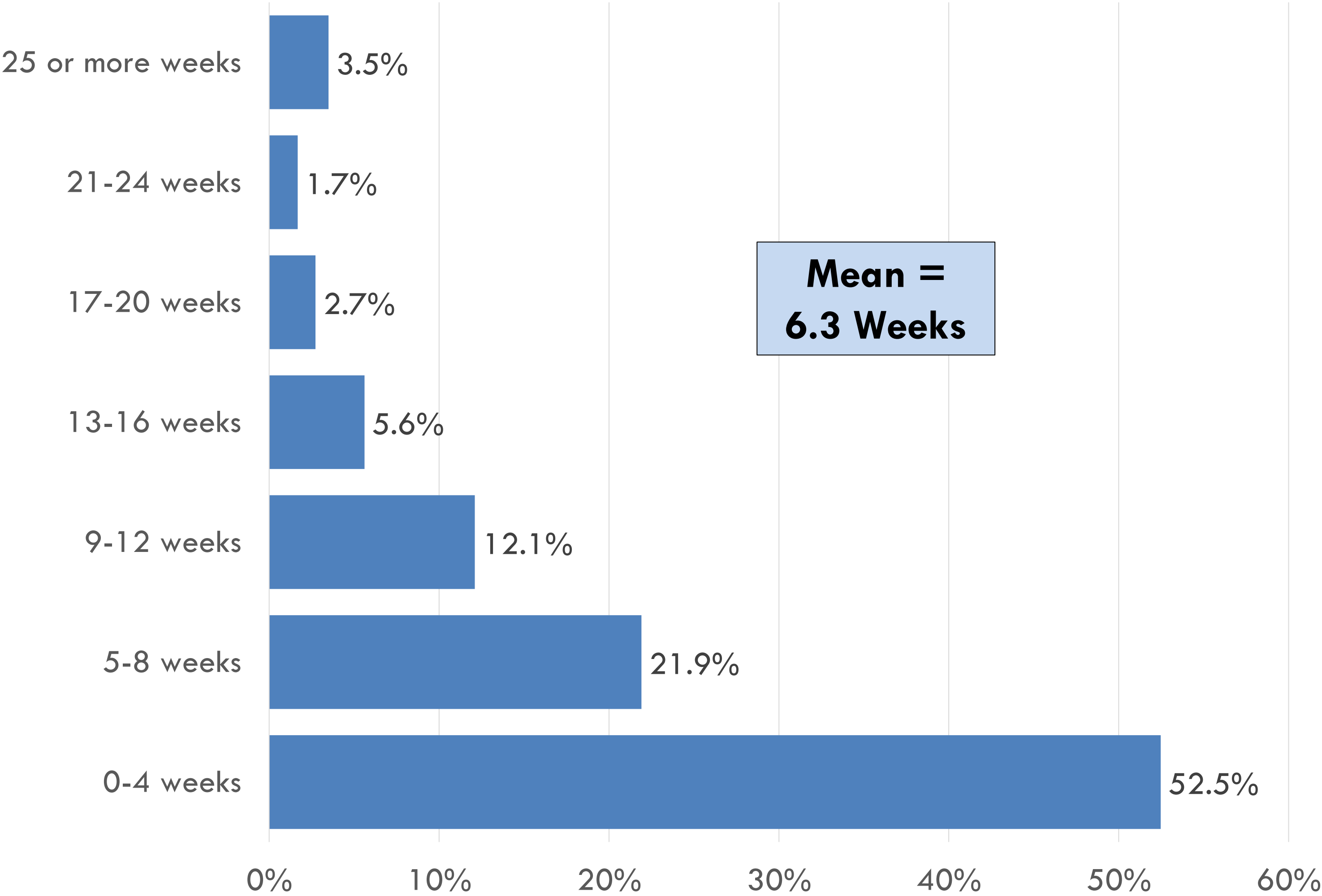
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



OVERNIGHT TRIPS: PLANNING WINDOW

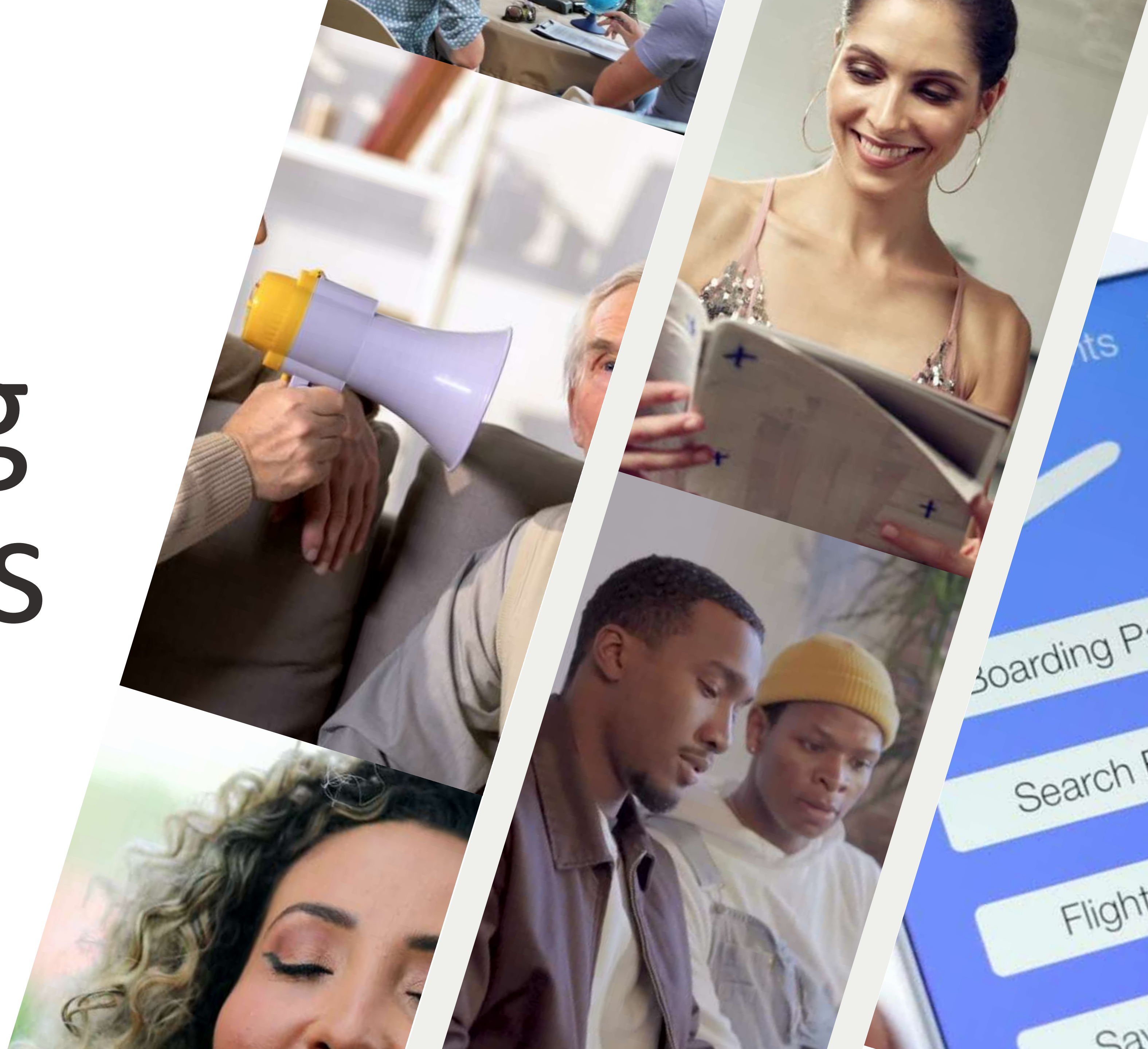
Question: How many weeks IN ADVANCE did you begin planning your most recent overnight trip?

(Base: Respondents who took an overnight trip, 2,479 completed surveys. Data collected May 17-18, 2023.)



Travel Planning Activities

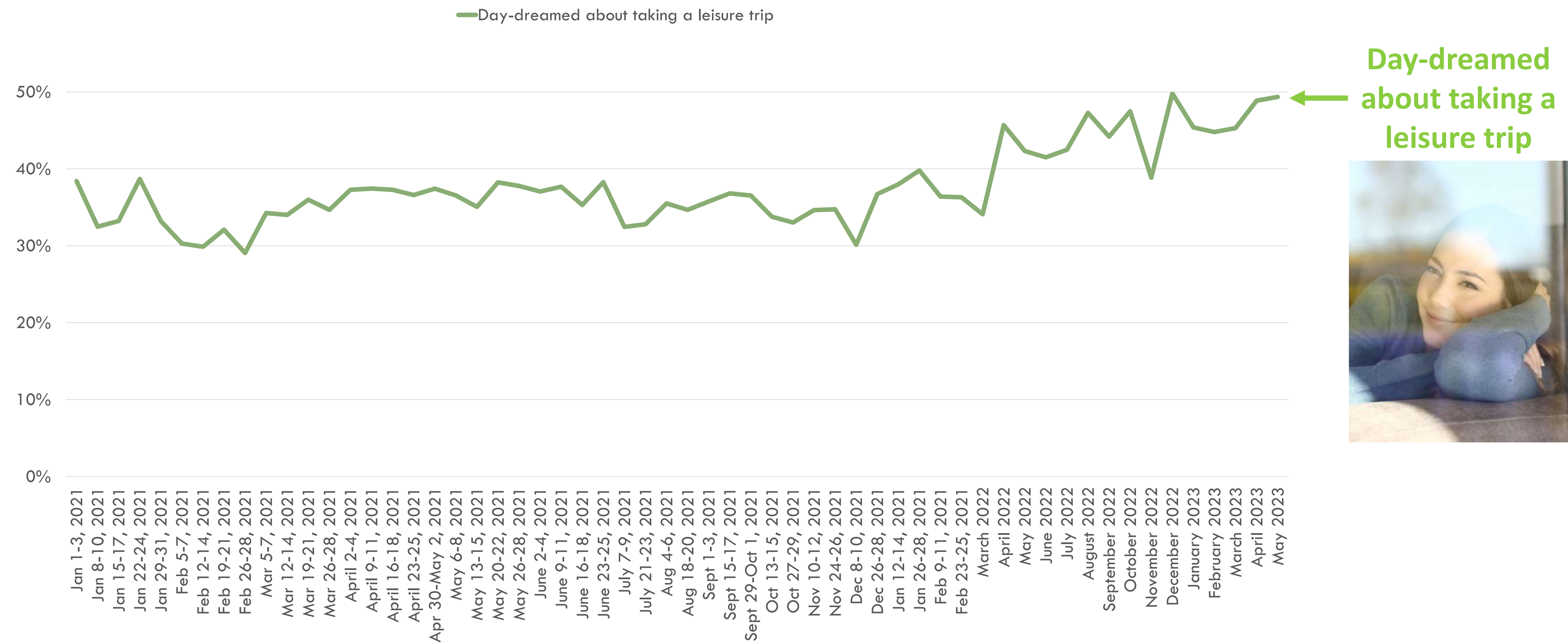
(Past Week)



TRAVEL PLANNING IN THE PAST WEEK

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

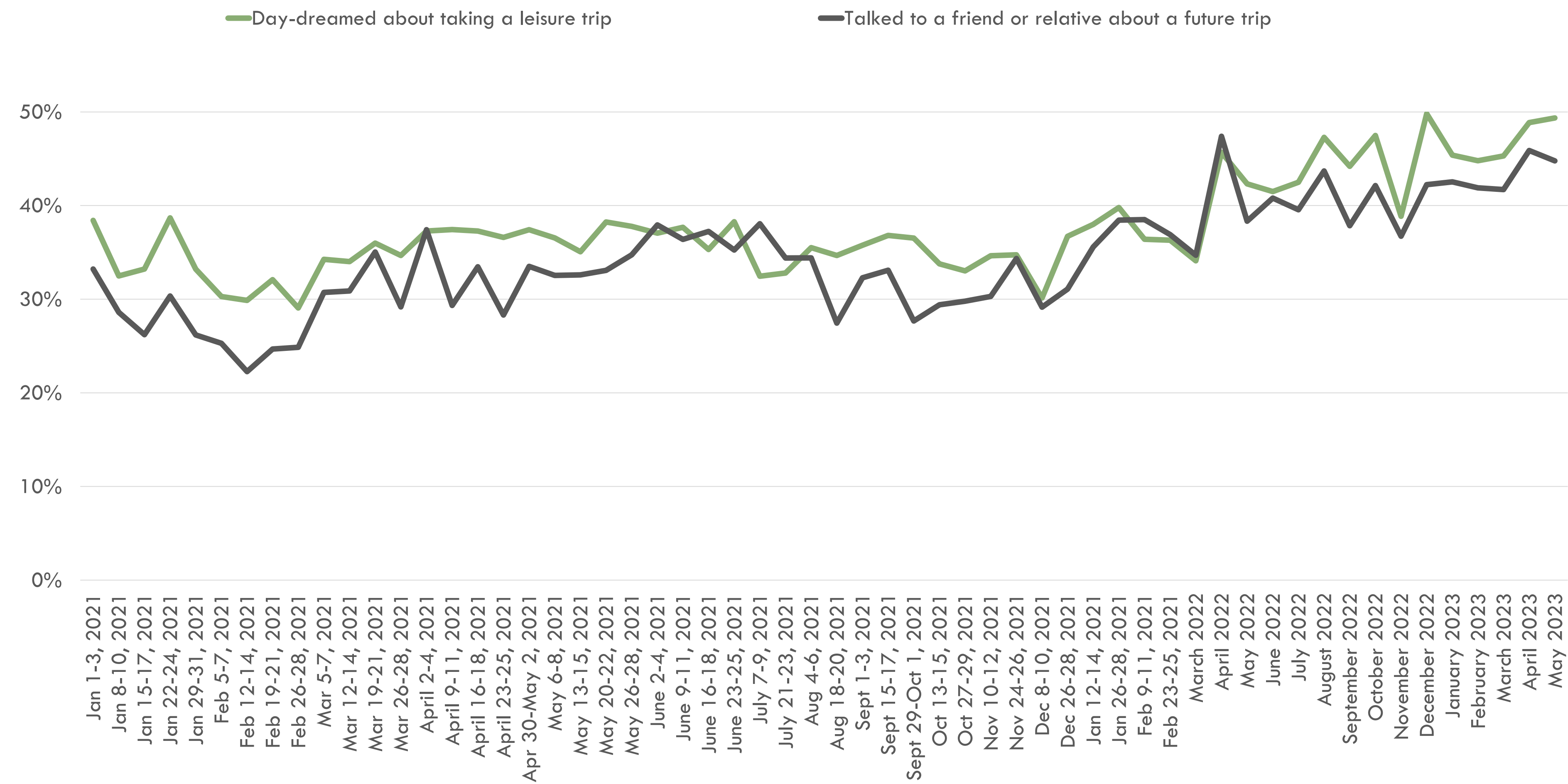
In the PAST WEEK I have _____



TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have _____



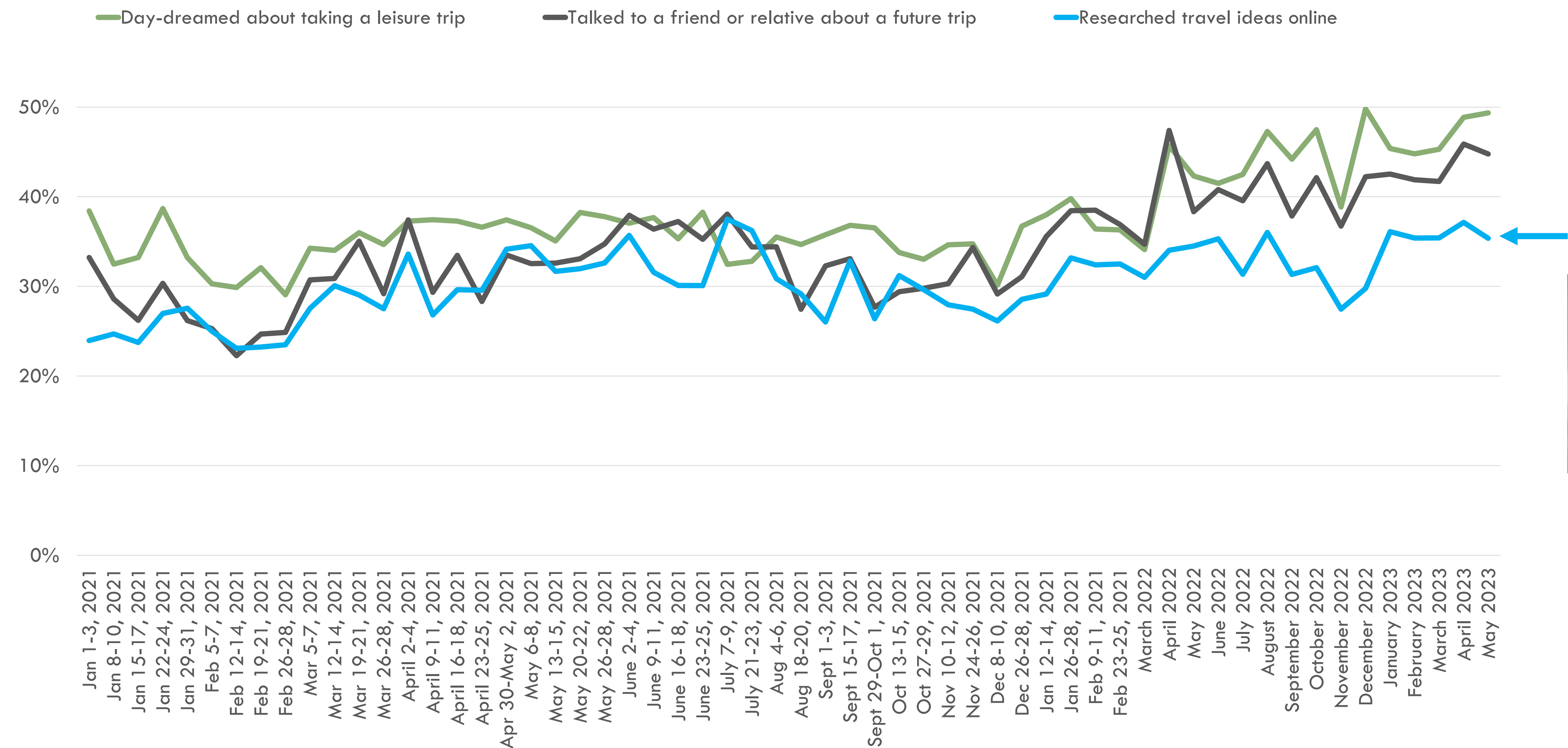
Talked to a friend about a future trip



TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have _____



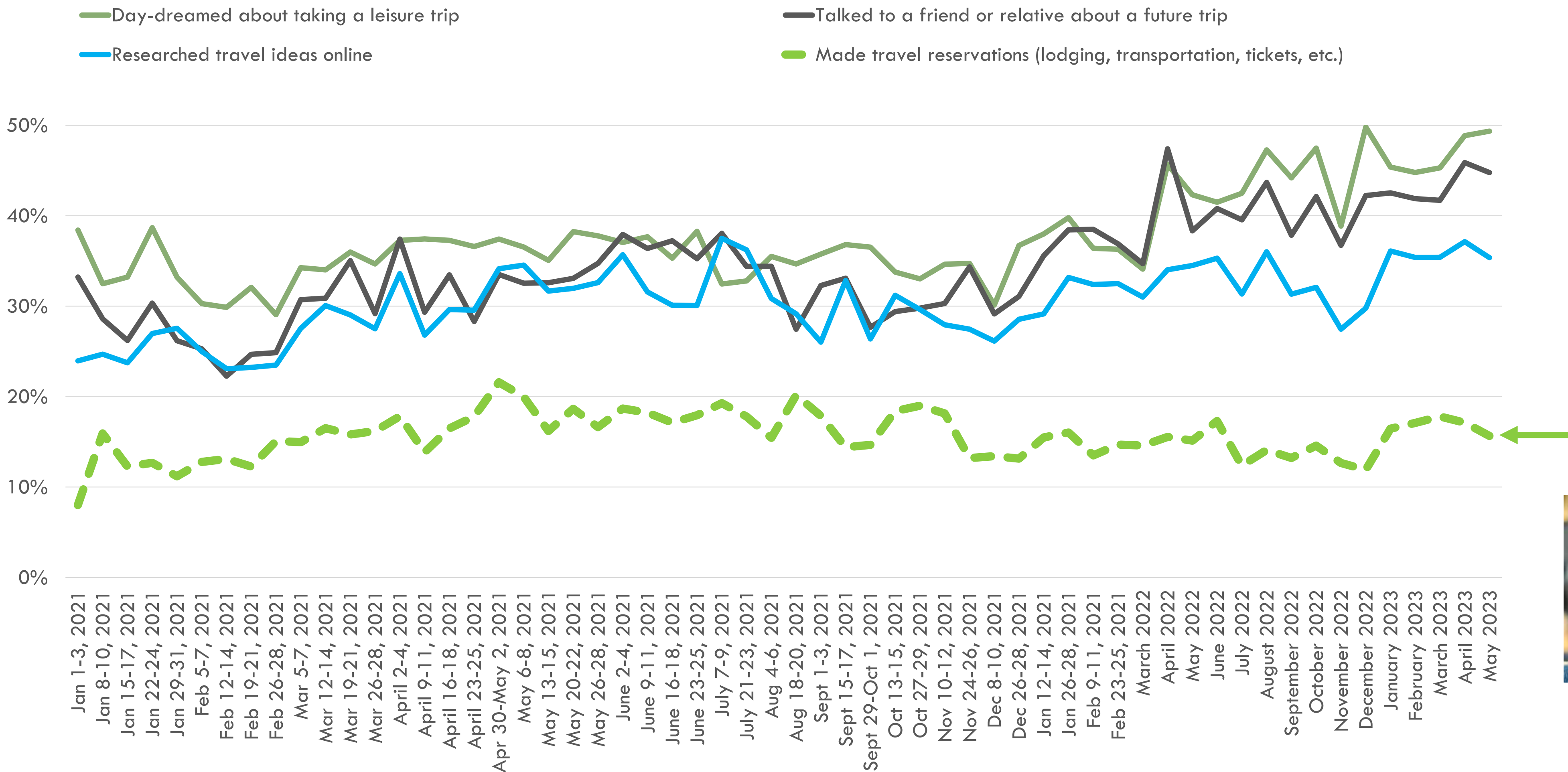
Researched Travel Ideas Online



TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have _____



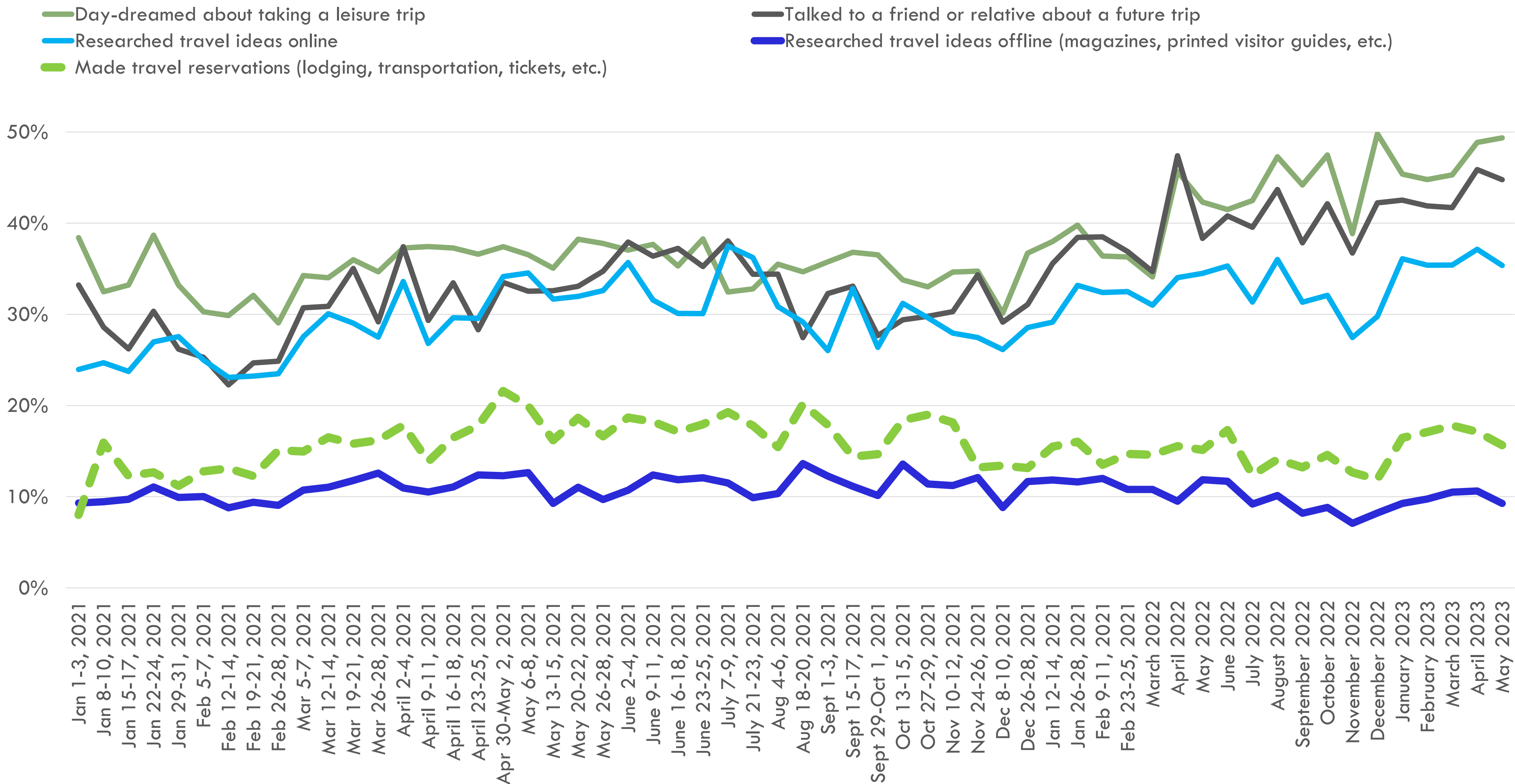
Made Travel Reservations



TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have _____



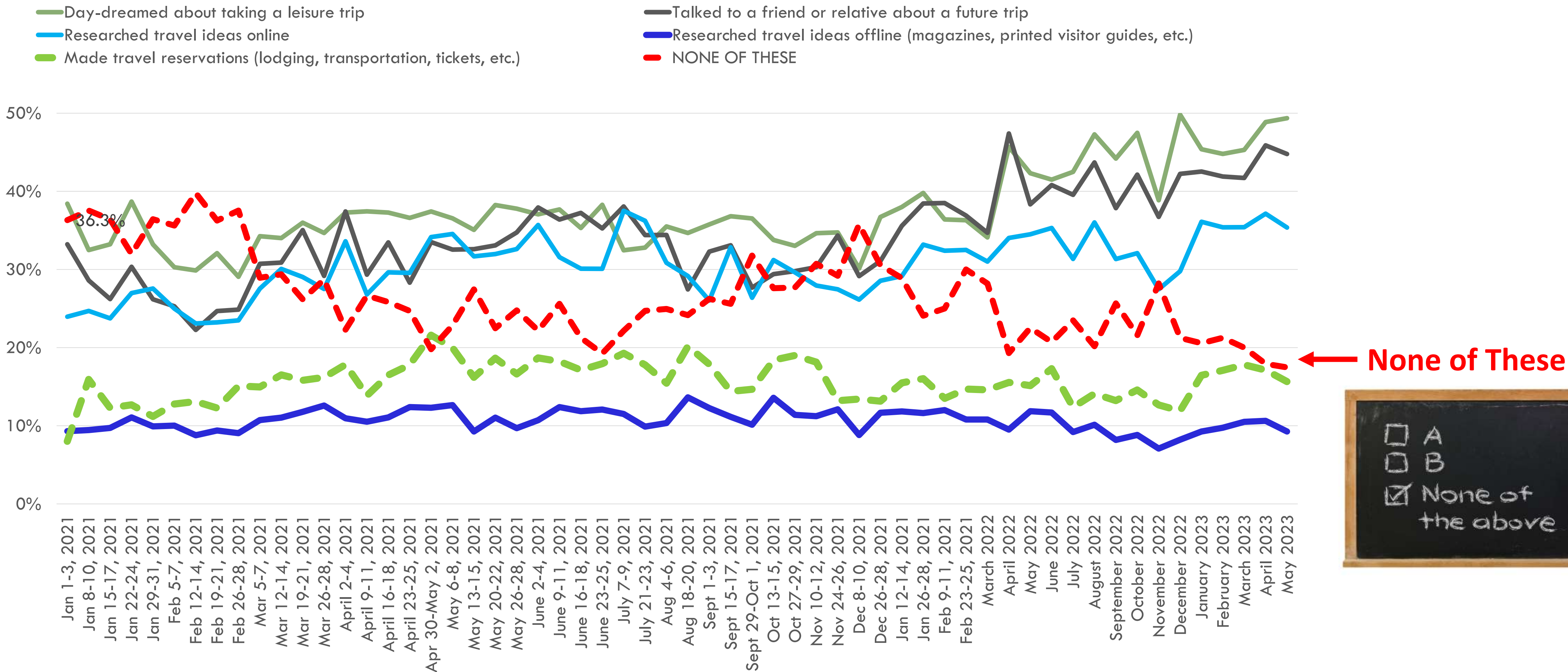
Researched Travel Ideas Offline



TRAVEL PLANNING IN THE PAST WEEK

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

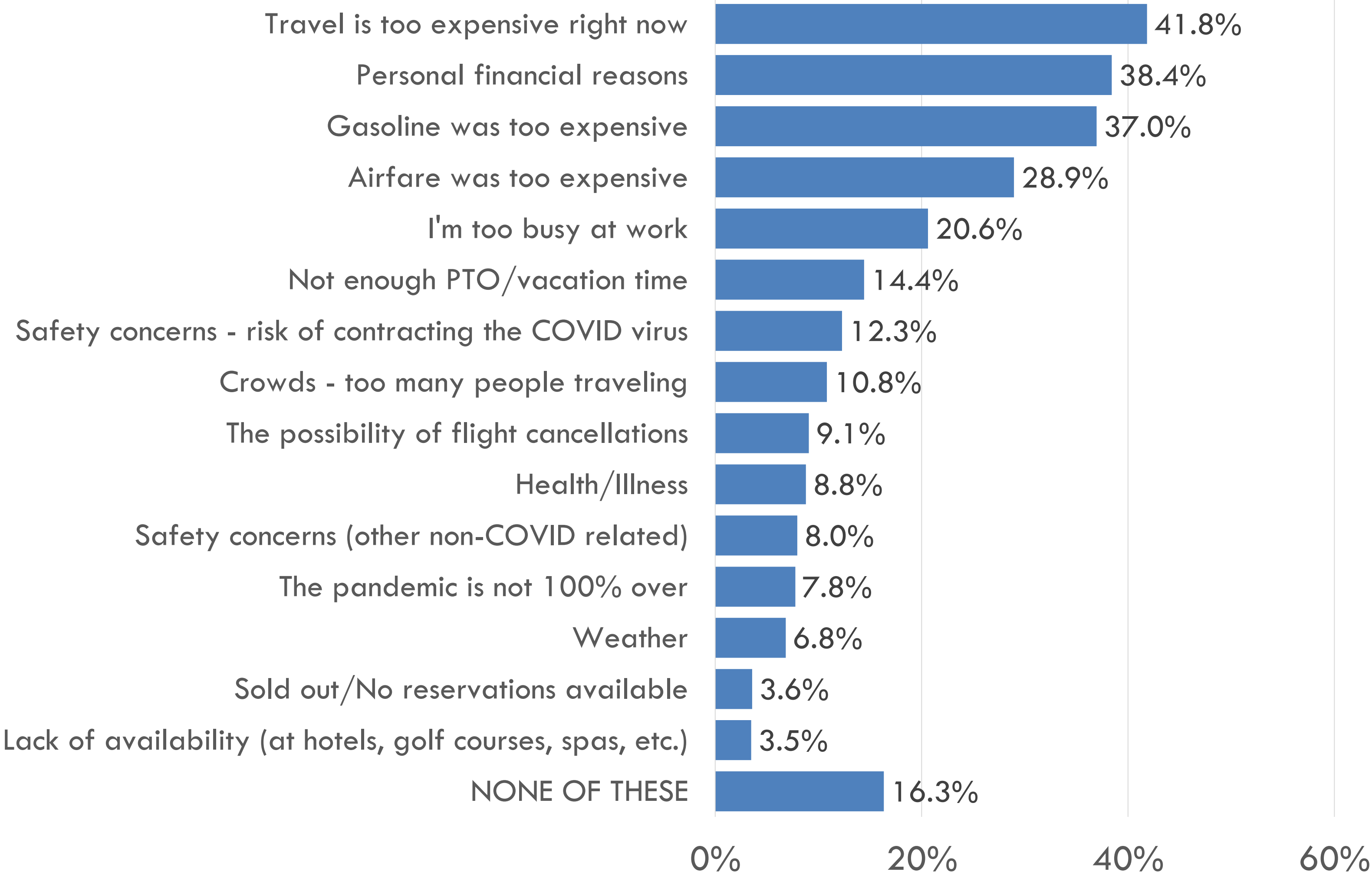
In the PAST WEEK I have _____



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)

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



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)

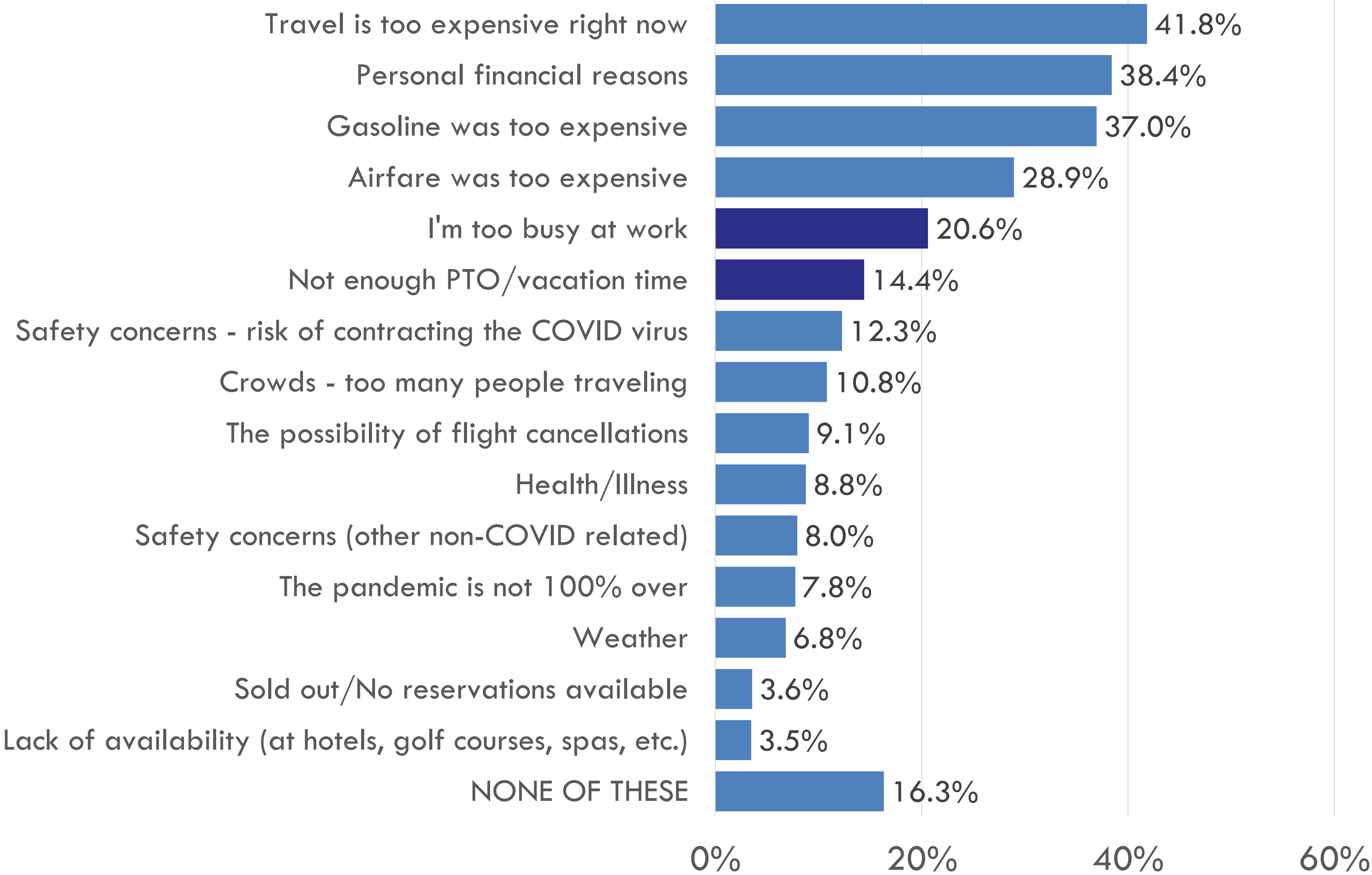
(Base: All respondents, 4,023 completed surveys.
Data collected April 15-22, 2023.)



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)

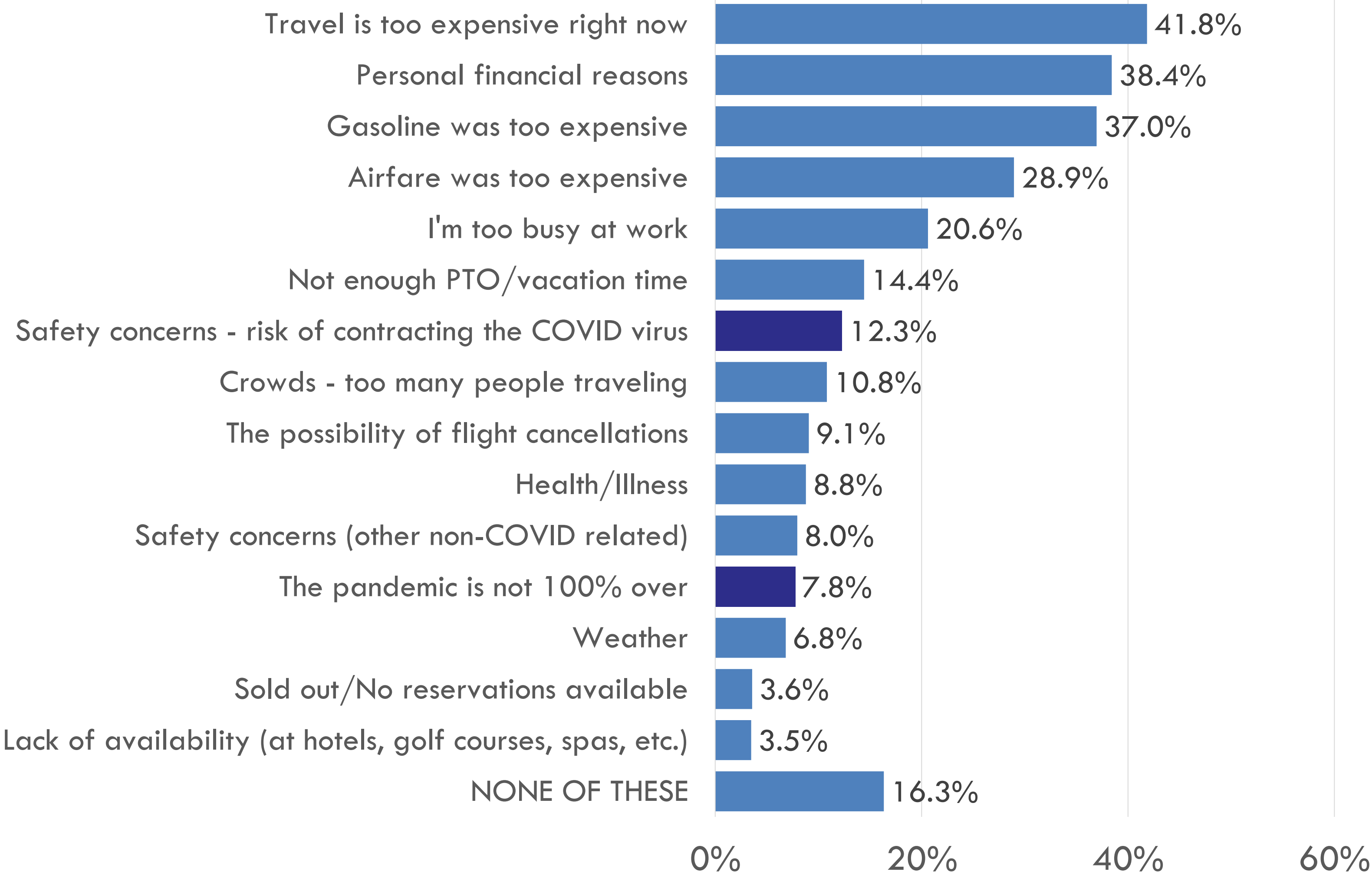
(Base: All respondents, 4,023 completed surveys.
Data collected April 15-22, 2023.)



DETERRENTS TO TRAVELING IN THE PAST 6 MONTHS

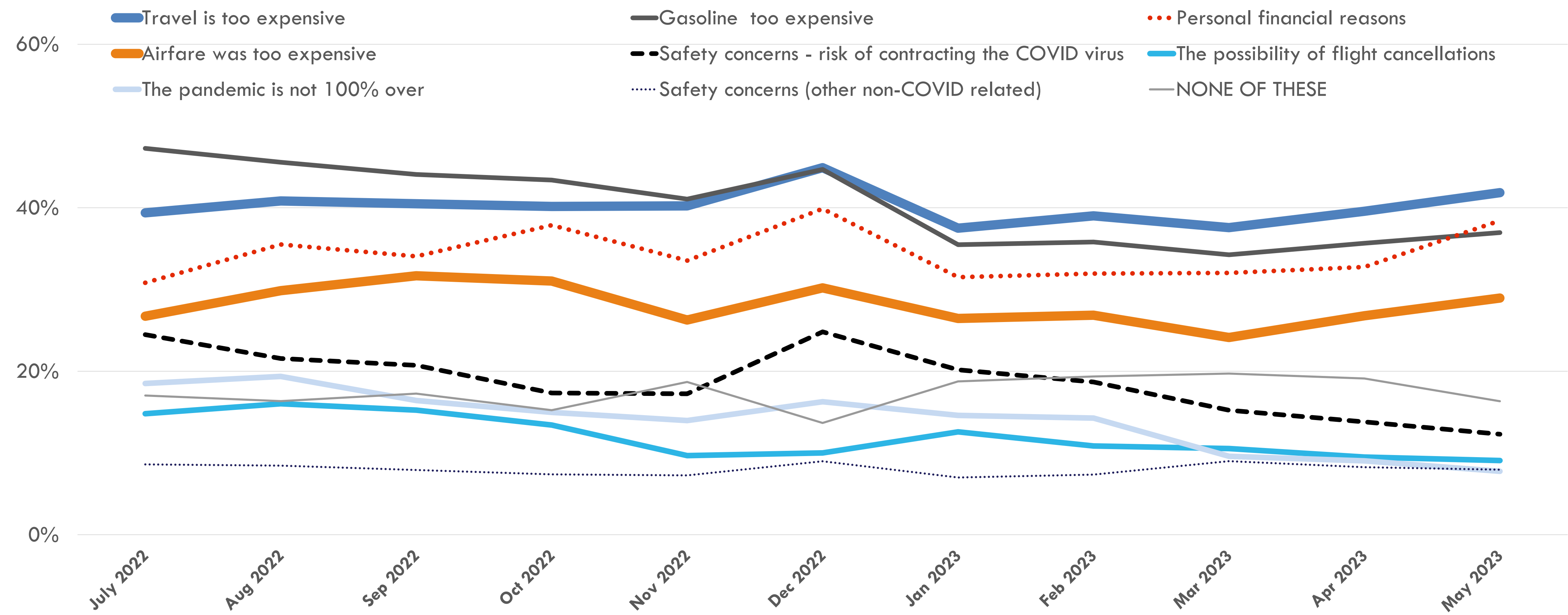
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

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



DETERRENTS TO TRAVELING IN THE PAST 6 MONTHS—TIME SERIES

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)



American Travelers' Predictions for 2023

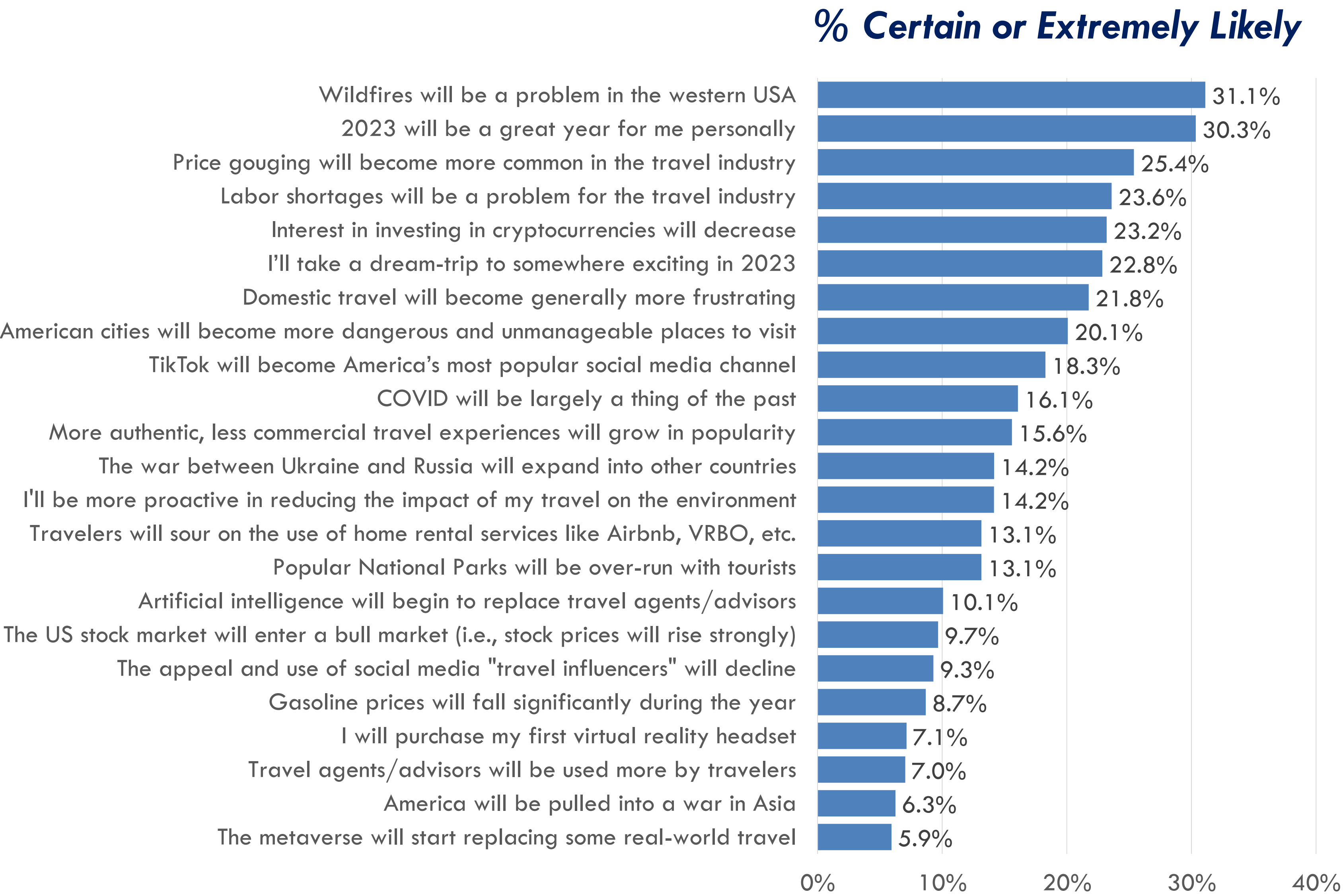
% SHOWN ARE THOSE THAT SAY HIGH LIKELIHOOD/CERTAINTY



2023 OUTLOOK

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

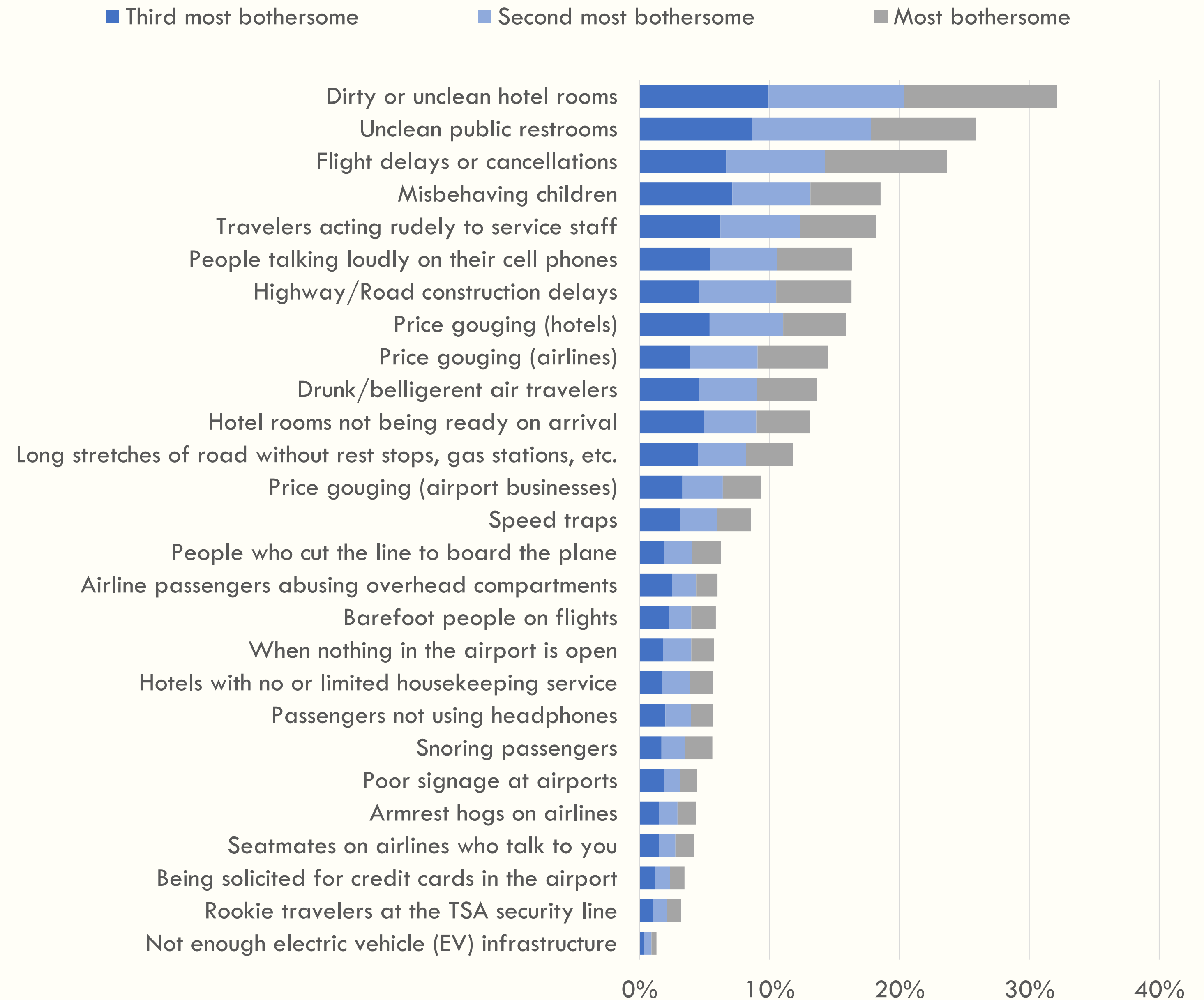
(Base: All respondents, 4,017 completed surveys. Data collected December 15-24, 2022.)



Question:

What are your travel pet peeves?

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



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

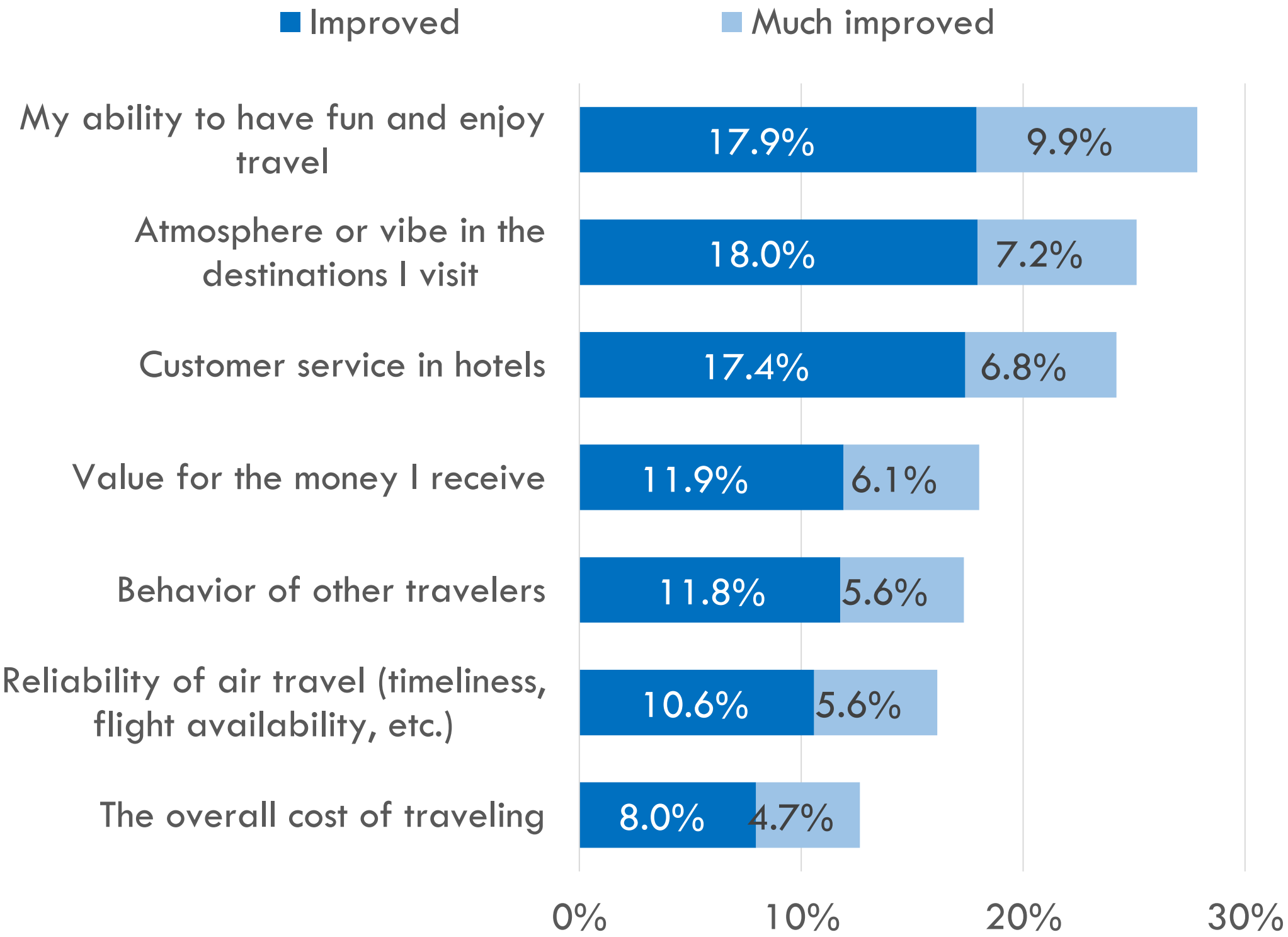
**COMPARED TO BEFORE THE PANDEMIC, HOW
WOULD YOU RATE EACH OF THE FOLLOWING
ASPECTS OF TRAVELING** *RIGHT NOW?*



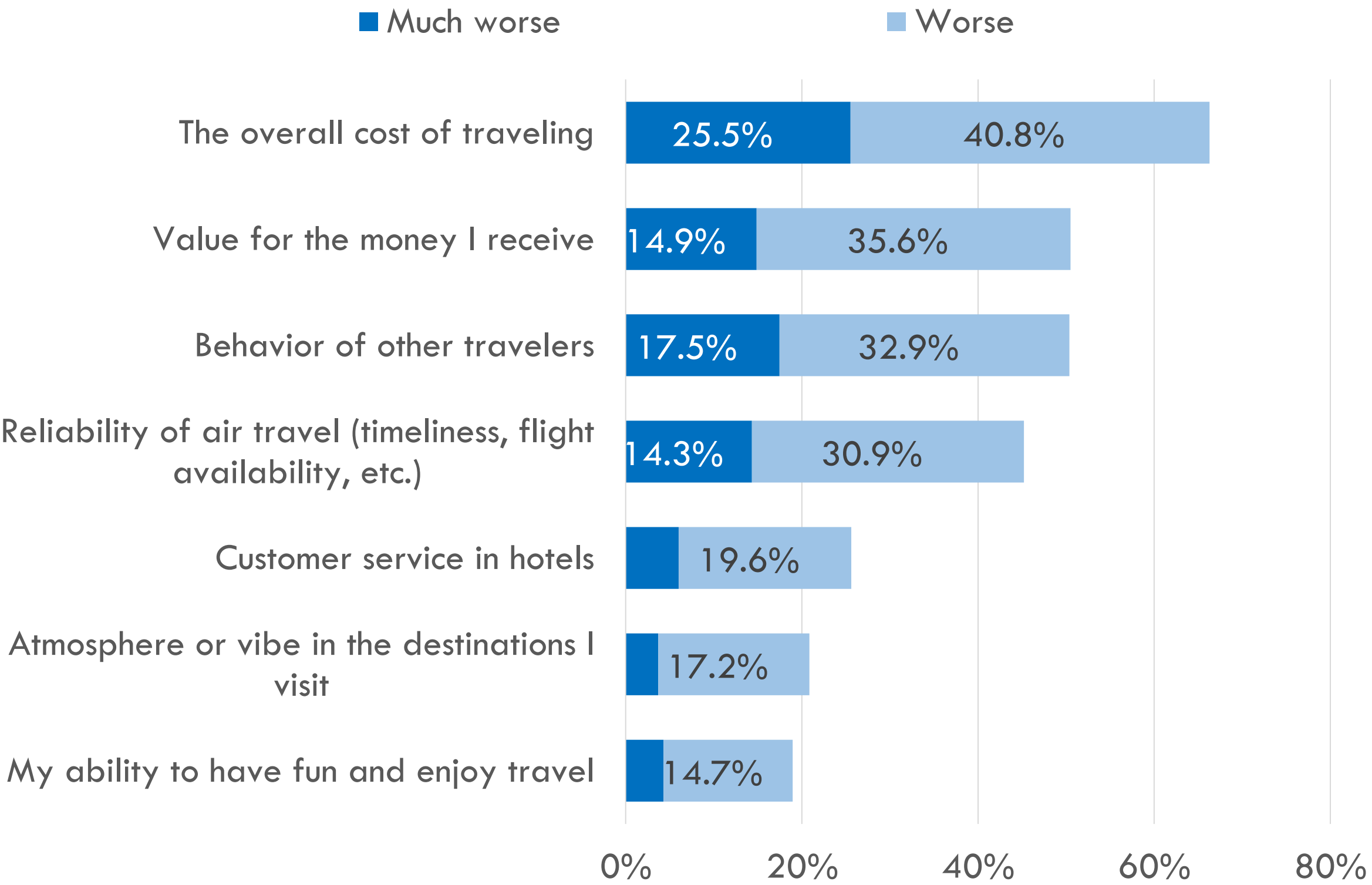
HOW HAS THE TRAVEL EXPERIENCE CHANGED?

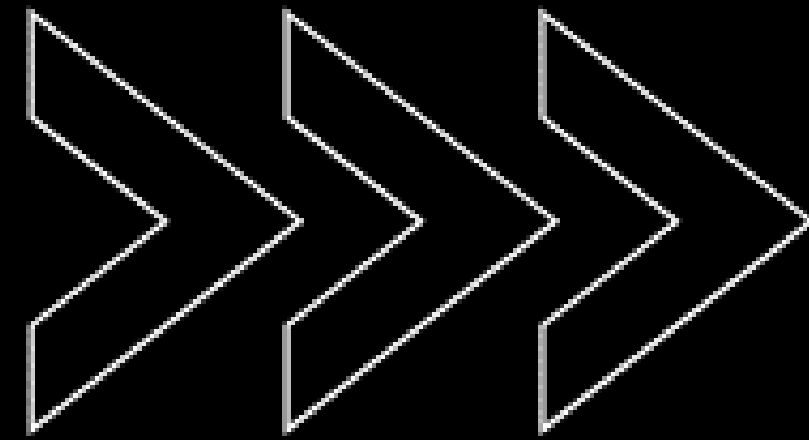
Question: Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

The Good



The Bad





**A Special
Thanks!**



Love

COMMUNICATIONS



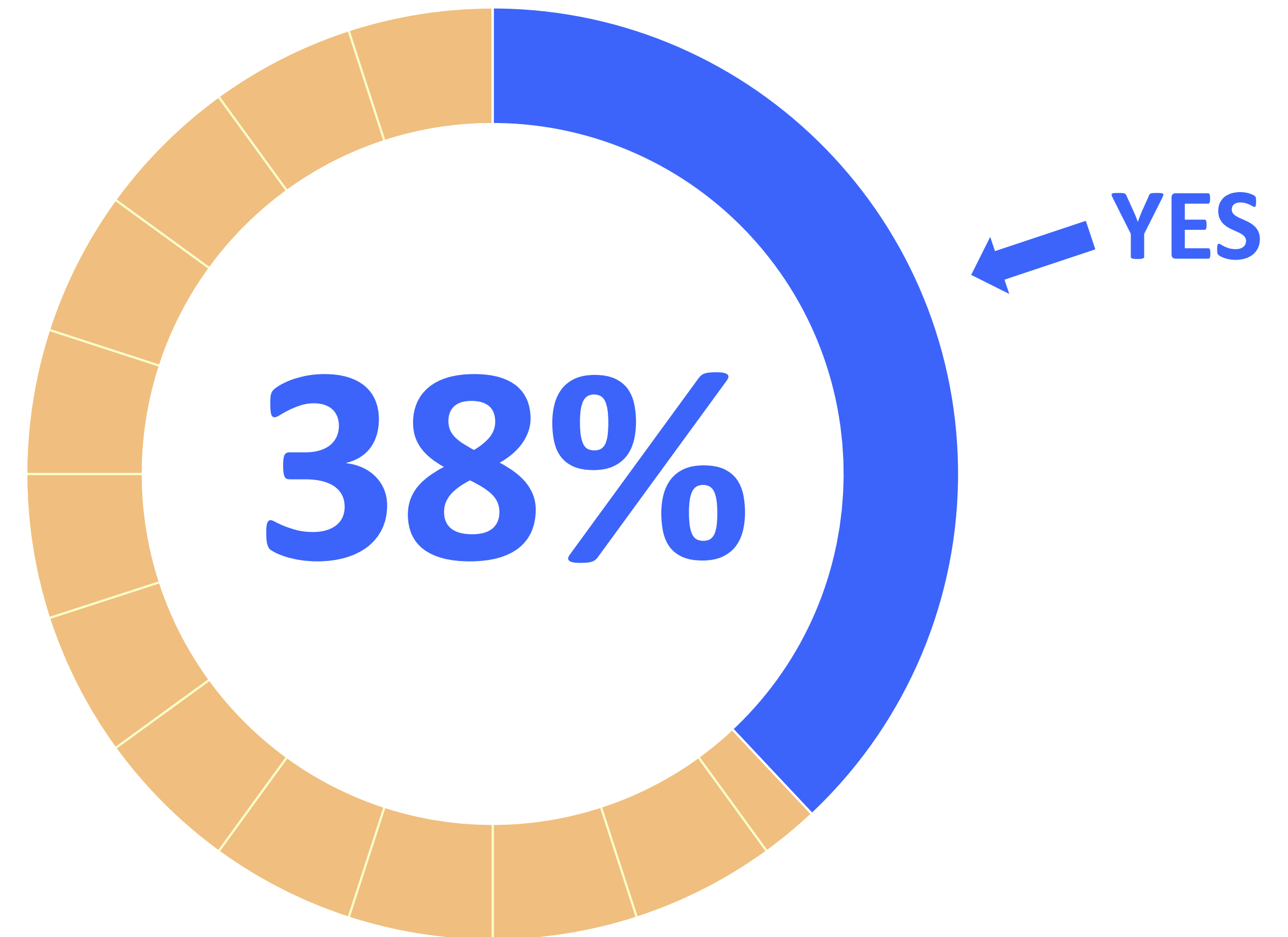
Sticker Shock

is the surprise and dismay a traveler might experience on being informed of a product or service's unexpectedly high price.



Question:

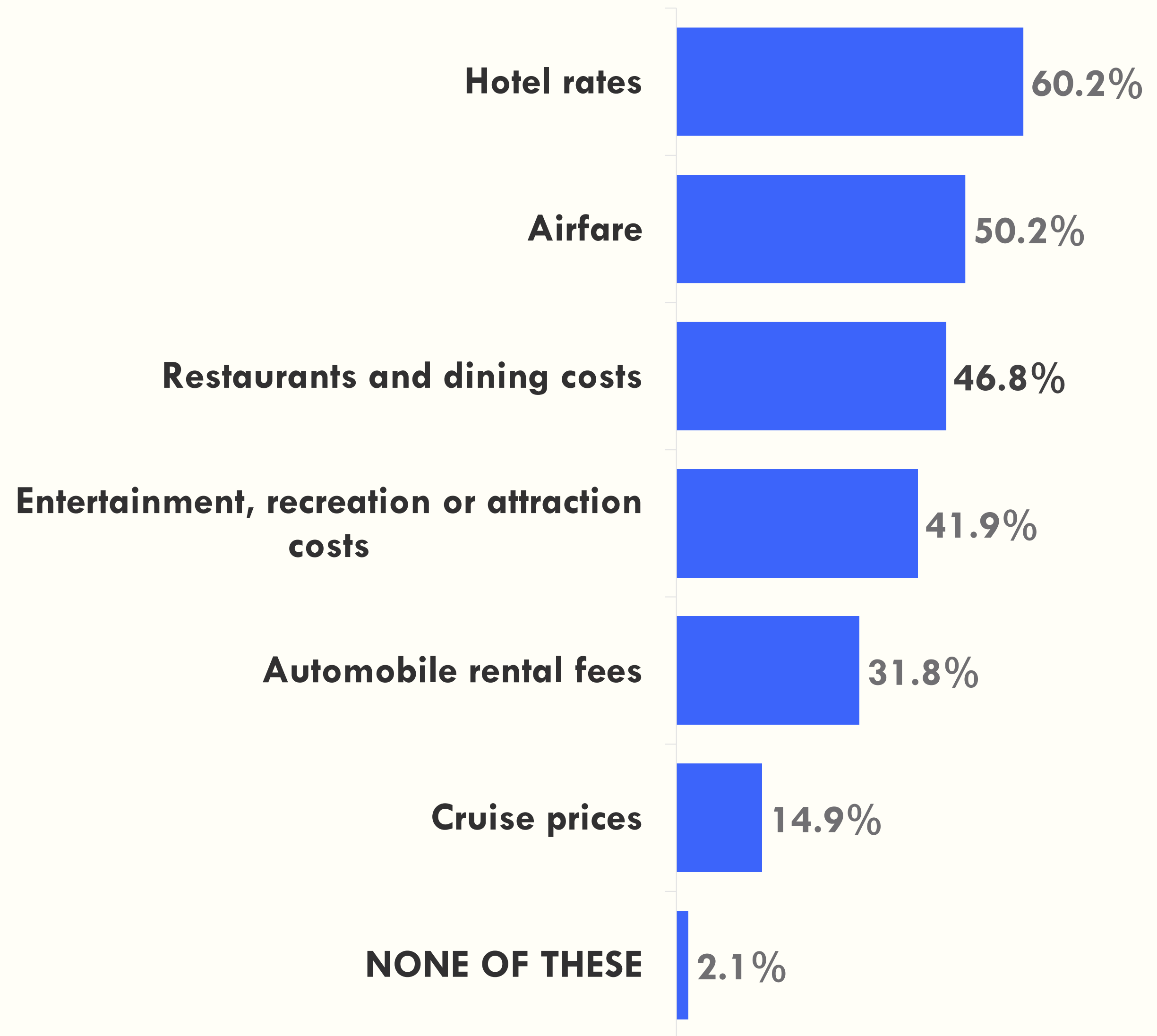
Thinking of the last time you were planning a trip (i.e., prior to leaving home), did you experience any sticker shock?



Question:

For which of the following did you experience sticker shock?

(Select all that apply)



(Base: Respondents who experienced sticker shock while planning their most recent trip, 1,589 completed surveys. Data collected May 17-21, 2023.)

Question:

Upon experiencing
this sticker shock,
which (if any) of the
following did you
do?

(Select all that apply)

Found less expensive ways to travel
or ways to save money

47.7% (18%)

Increased my overall budget for the
trip

27.7% (11%)

Chose to visit a less expensive
destination(s)

25.8% (10%)

Cancelled my travel plans entirely

14.8% (6%)

NONE OF THESE

11.4%

% of all
travelers

Base: Respondents who experienced sticker shock while planning their most recent trip,
1,589 completed surveys. Data collected May 17-21, 2023.)

PASSION PROFILES



PASSION PROFILES

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



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



**SCAN
HERE TO
PURCHASE!**

Destination  Analysts

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

