

A woman with long blonde hair and sunglasses is sitting on a beach, holding a glass bottle of yellow juice. A young girl with blonde hair and orange sunglasses is sitting next to her, also smiling and looking at the bottle. They are both wearing casual clothing. The background shows the ocean waves and a clear sky.

# The State of the American Traveler

# Future Partners

**Opportunity  
powered by insight.**

*Today*

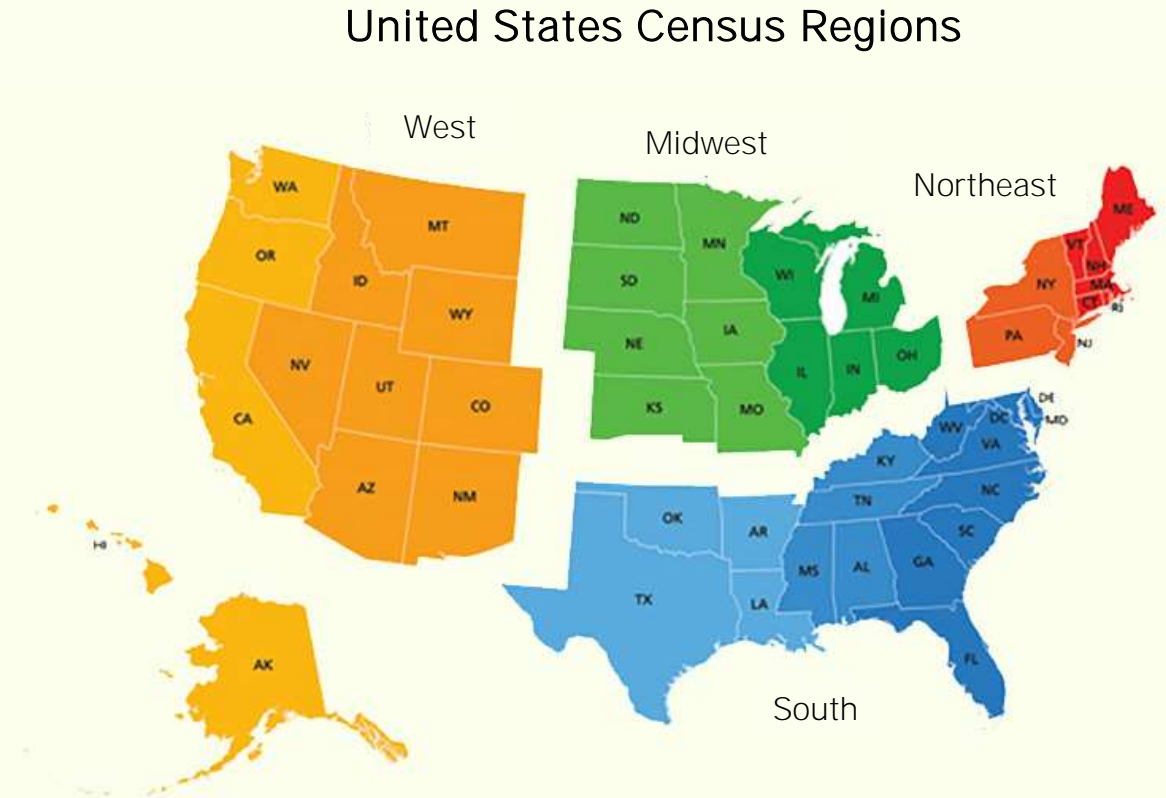
1. Travel Loyalty
2. Travel Sentiment
3. Marketing Travel
4. Community + Local Tourism  
Sentiment
5. Dark Tourism Panel

Presentation deck and  
recording will be available on  
our website:

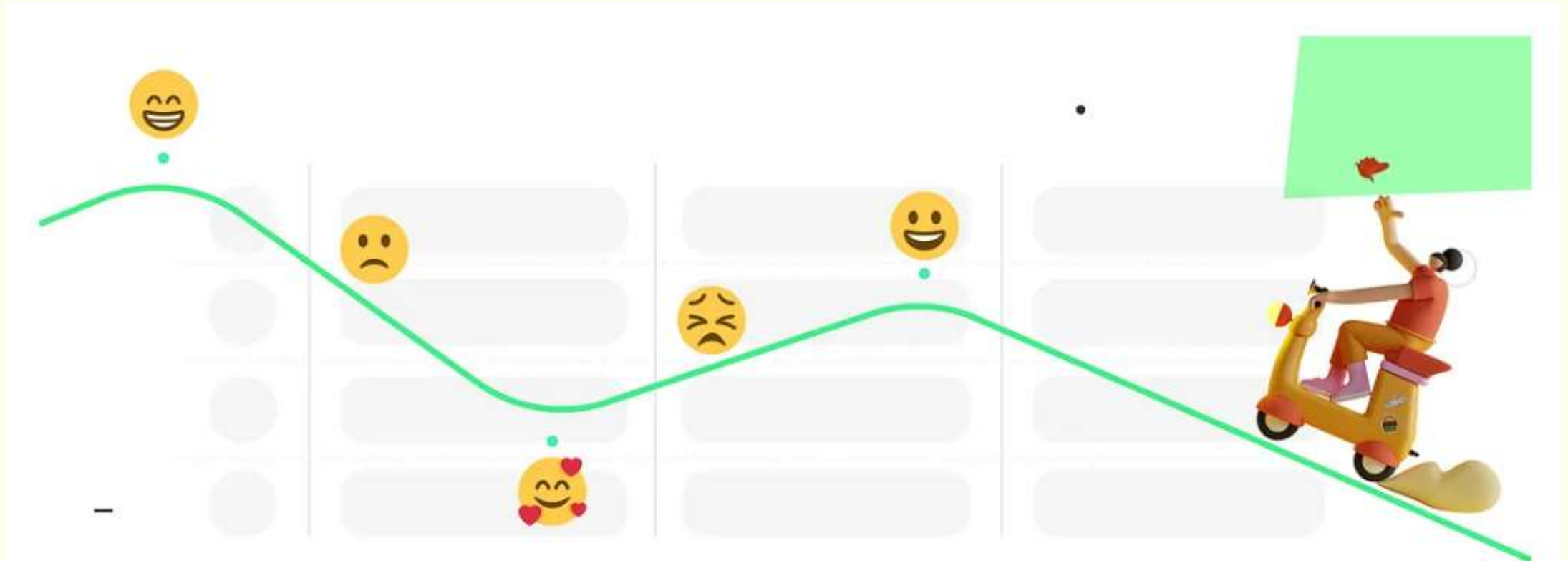
[FuturePartners.com](https://FuturePartners.com)

# 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: [September 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



# Customer Journey Map

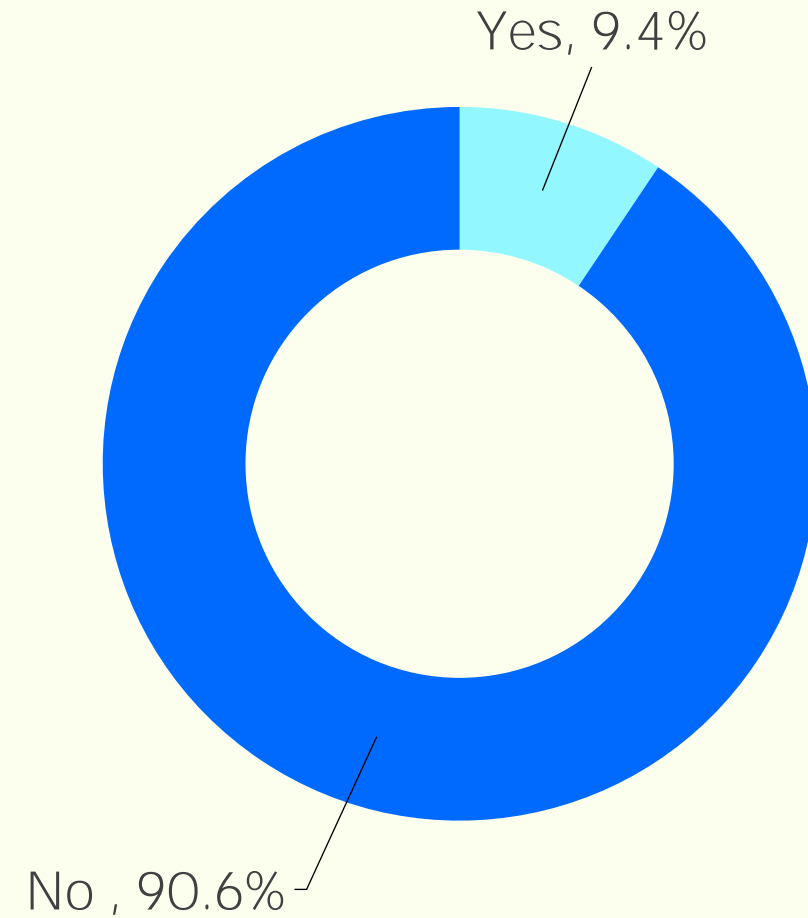




# Almost 1-in-10 American Travelers Have Travel-related Ink

Question:

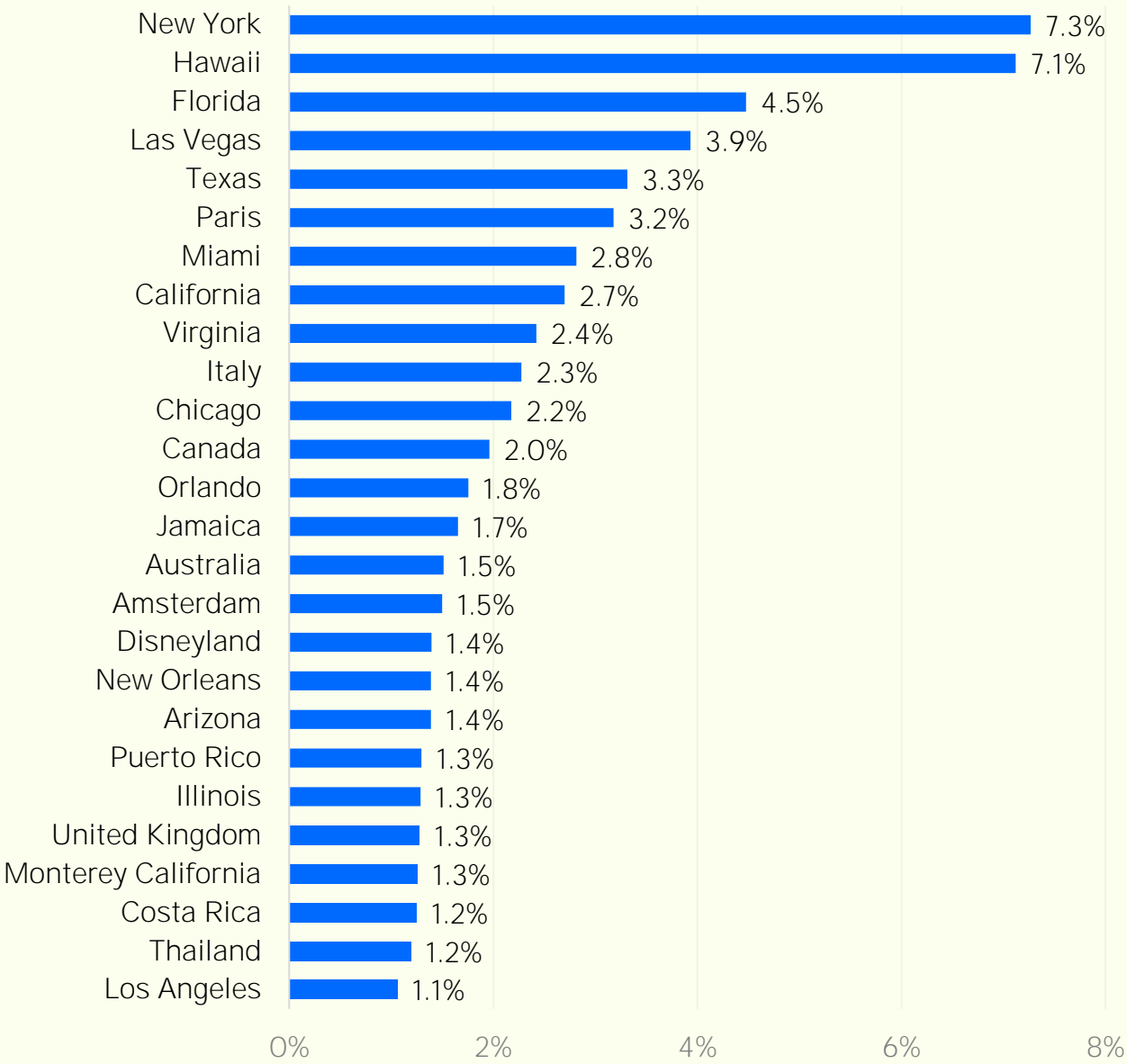
Have you ever received a tattoo(s) specifically to commemorate, celebrate or dream about a travel experience?



# Half is “Destination Ink”

Question:

IF YES ABOVE, which place or destination?





*“To move, to breathe, to fly, to float, To gain all while you give, To roam the roads of lands remote, To travel is to live.”*

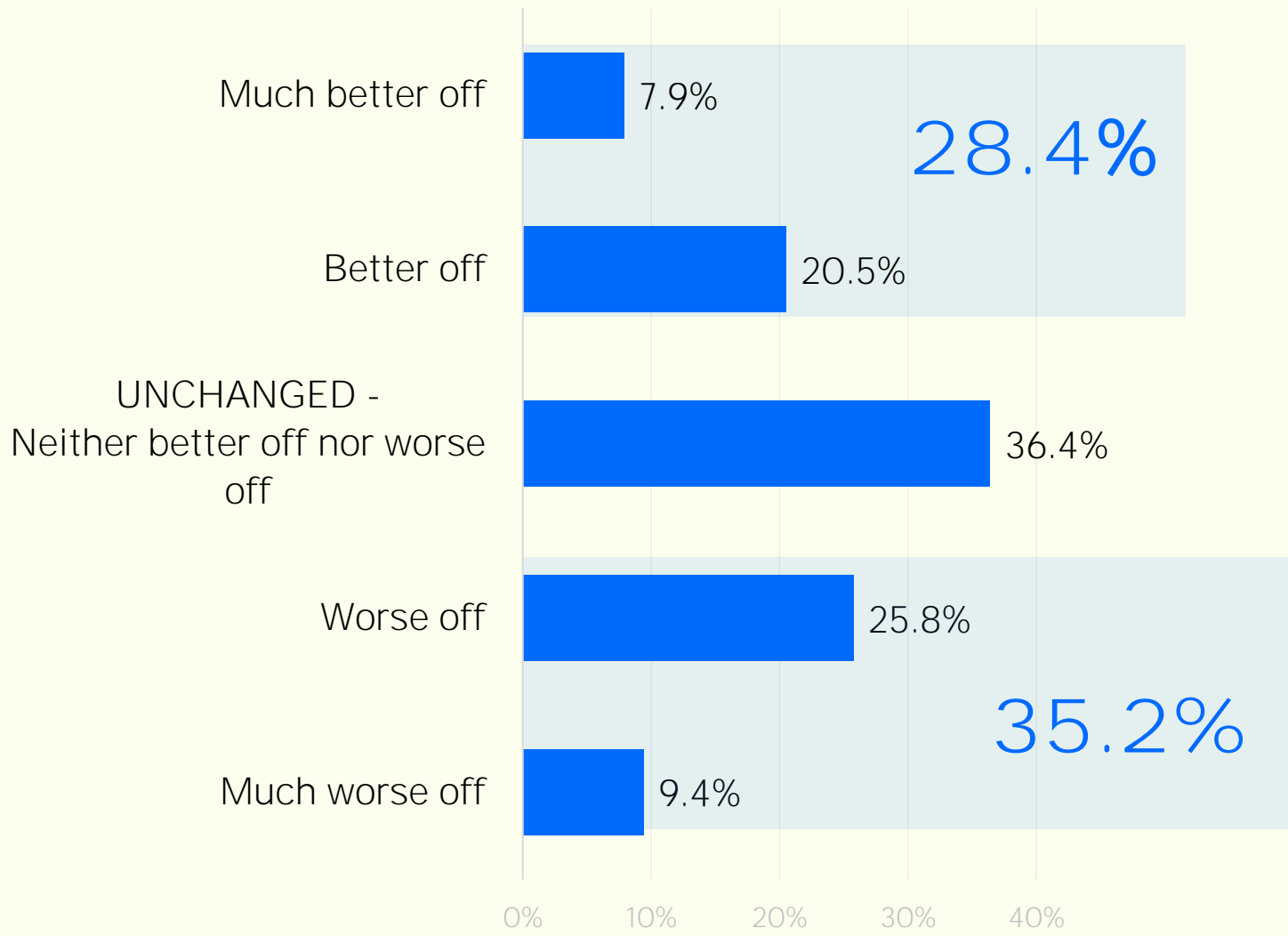
Hans Christian Andersen

# Current Sentiment



# Travelers Continue to be Split on Perceptions of their Current Financial Situation

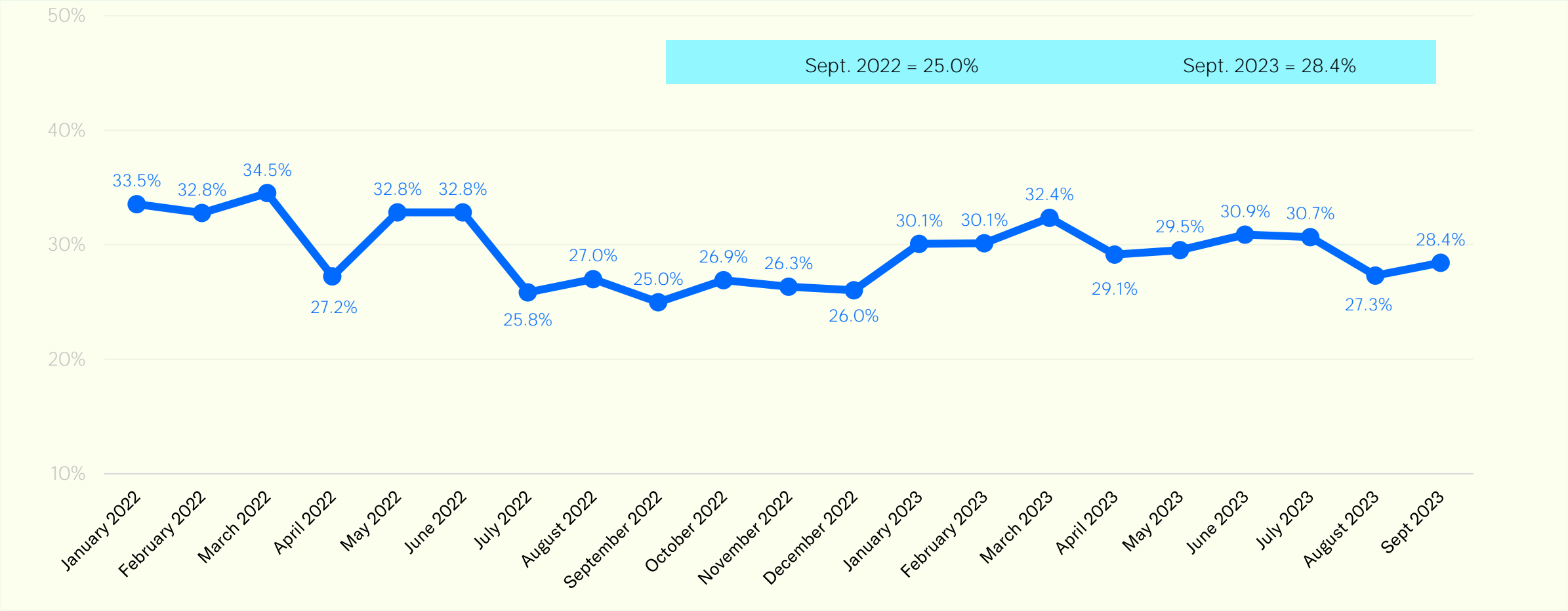
Question:  
Would you say that you (and your household)  
are better off or worse off financially than you  
were a year ago?



# There has been a Small Improvement in Financial Sentiment this Month—and Year-Over-Year

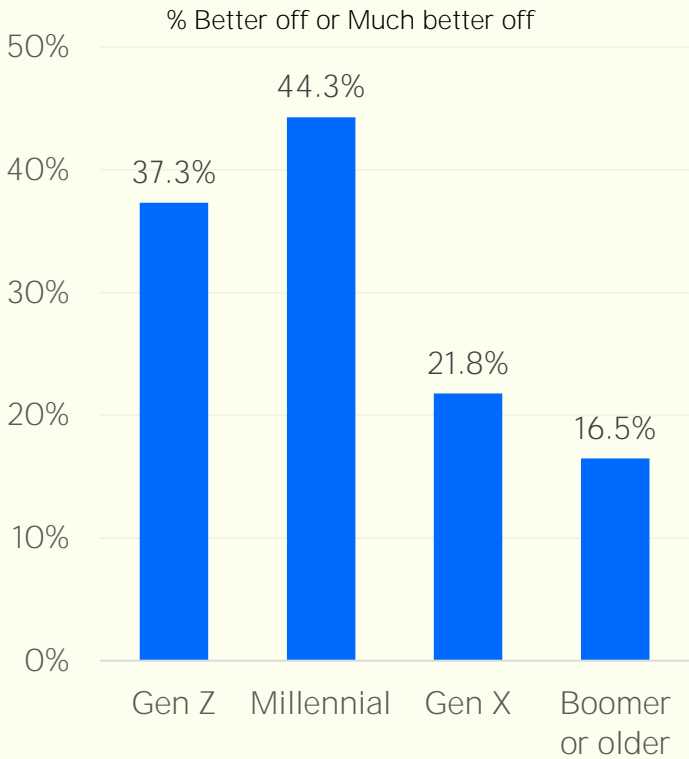
Question:  
Would you say that you (and your household) are better off or worse off financially than you were a year ago?

% Better off or Much better off

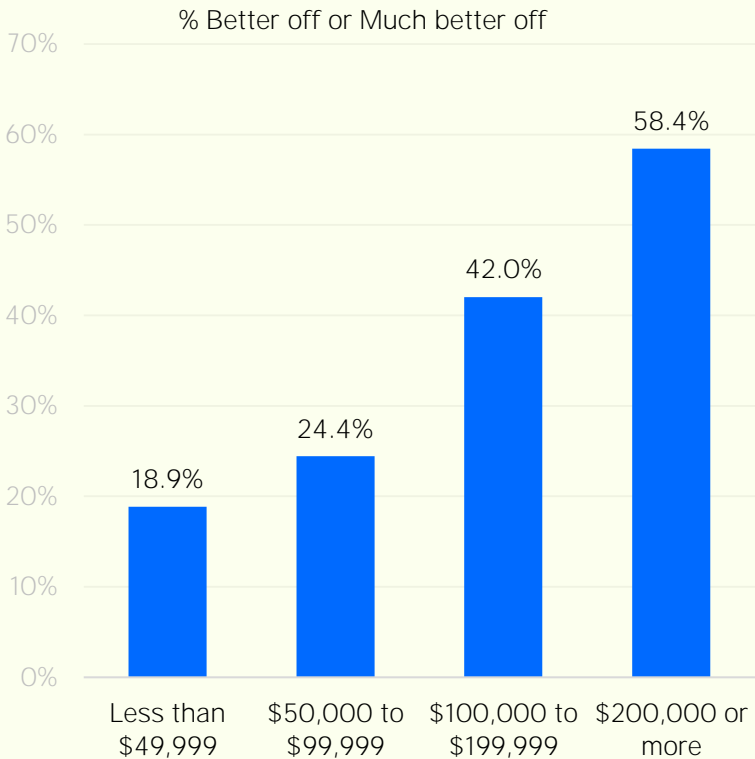


# Financial Sentiment is Notably Impacted by Age, Household Income and Type of Residence

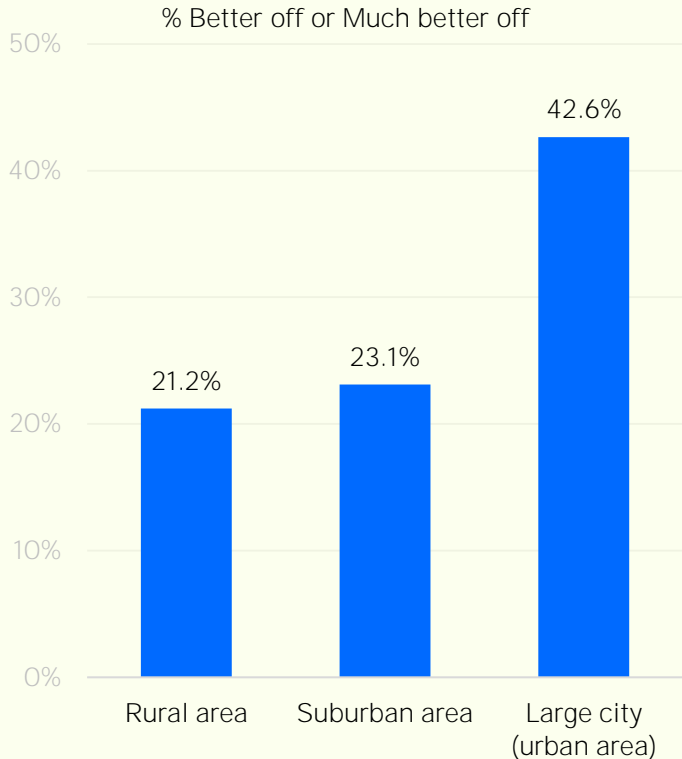
By Generation



By Annual Household Income



By Place of Residence

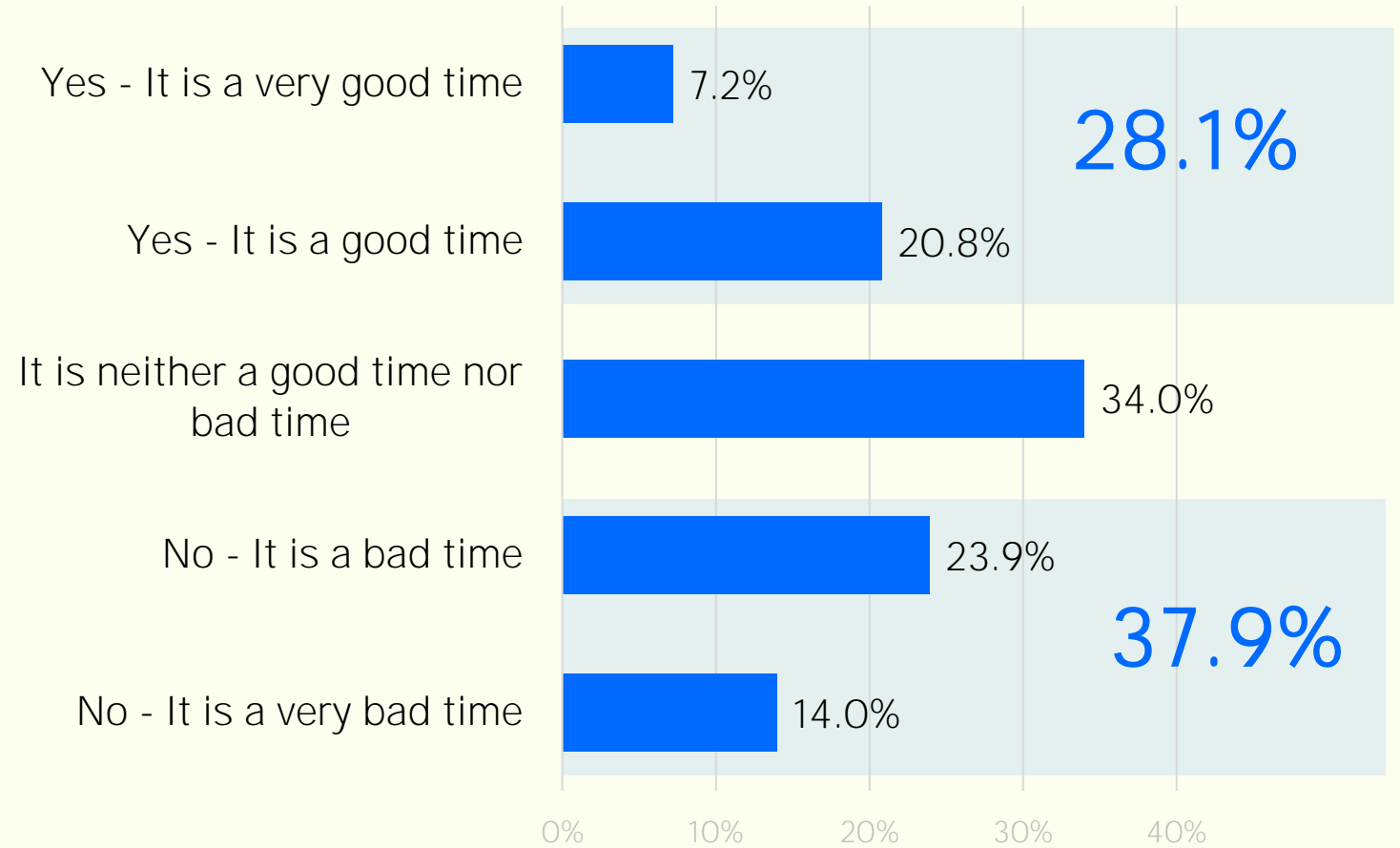


Compared a year earlier,  
travelers are feeling somewhat  
better-off. Affluent, urban and  
younger travelers are driving our  
overall sense of financial well-  
being.

# The Belief that Now is a Bad Time to Spend on Travel Remains Elevated...

## Question:

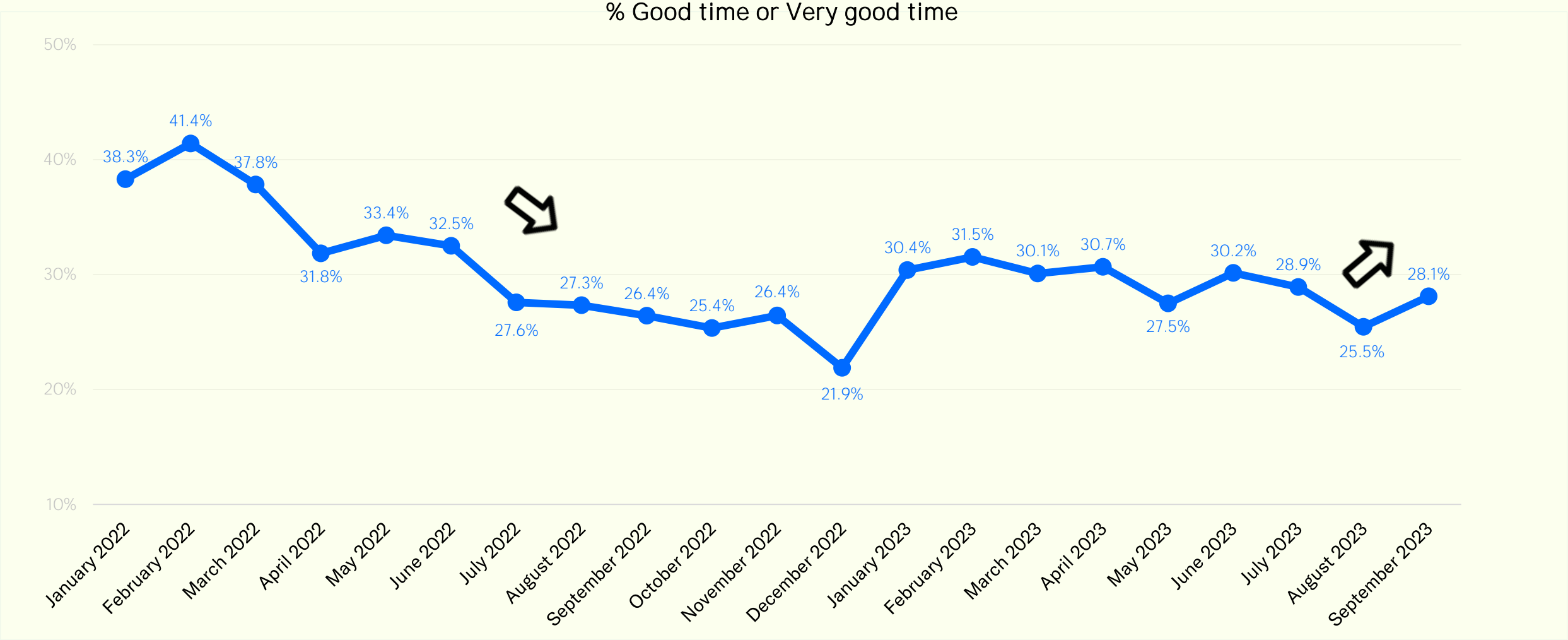
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?





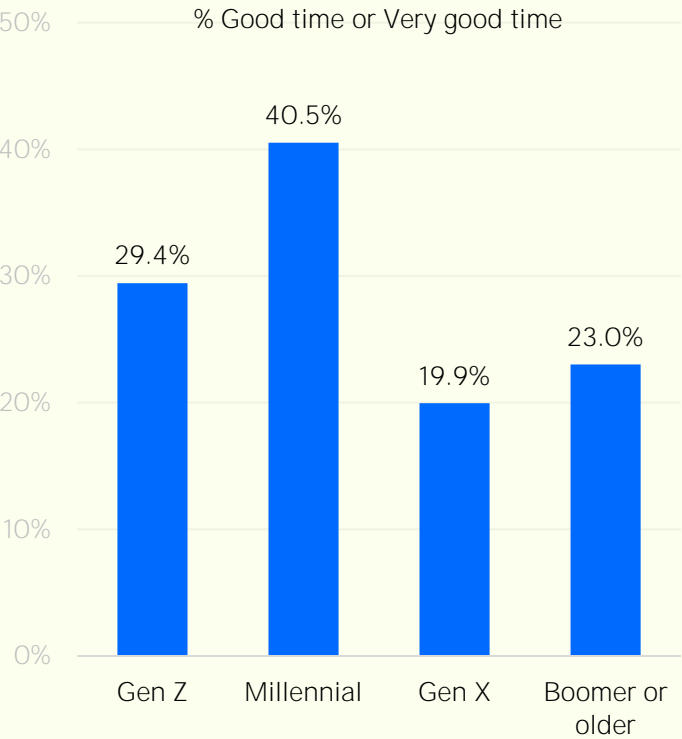
# But Positive Feelings Toward Travel Spending did Rebound this Month

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?



# Positive Feelings Towards Travel Spending in the Moment are Influenced by Age, Affluence and Residence Type

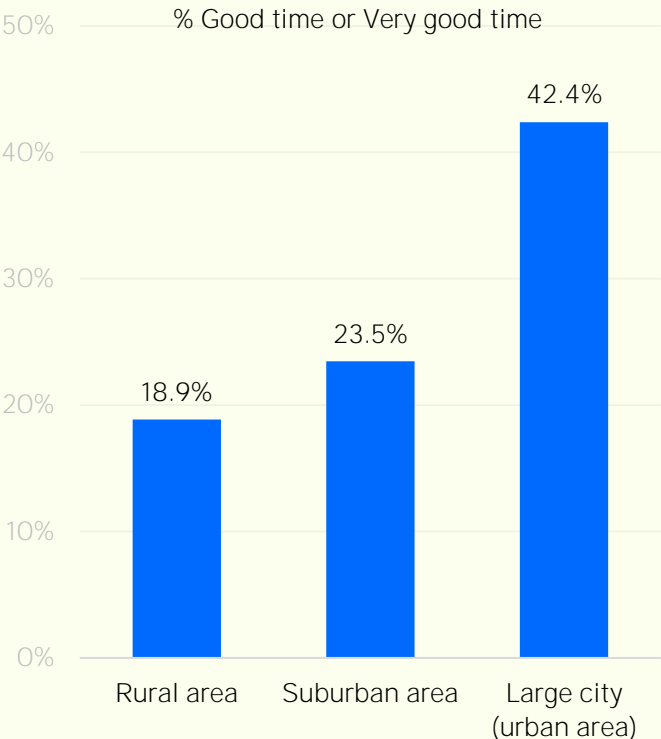
By Generation



By Annual Household Income



By Place of Residence



There are more travelers that say now is a bad time to spend on travel than there are that say it is a good time.

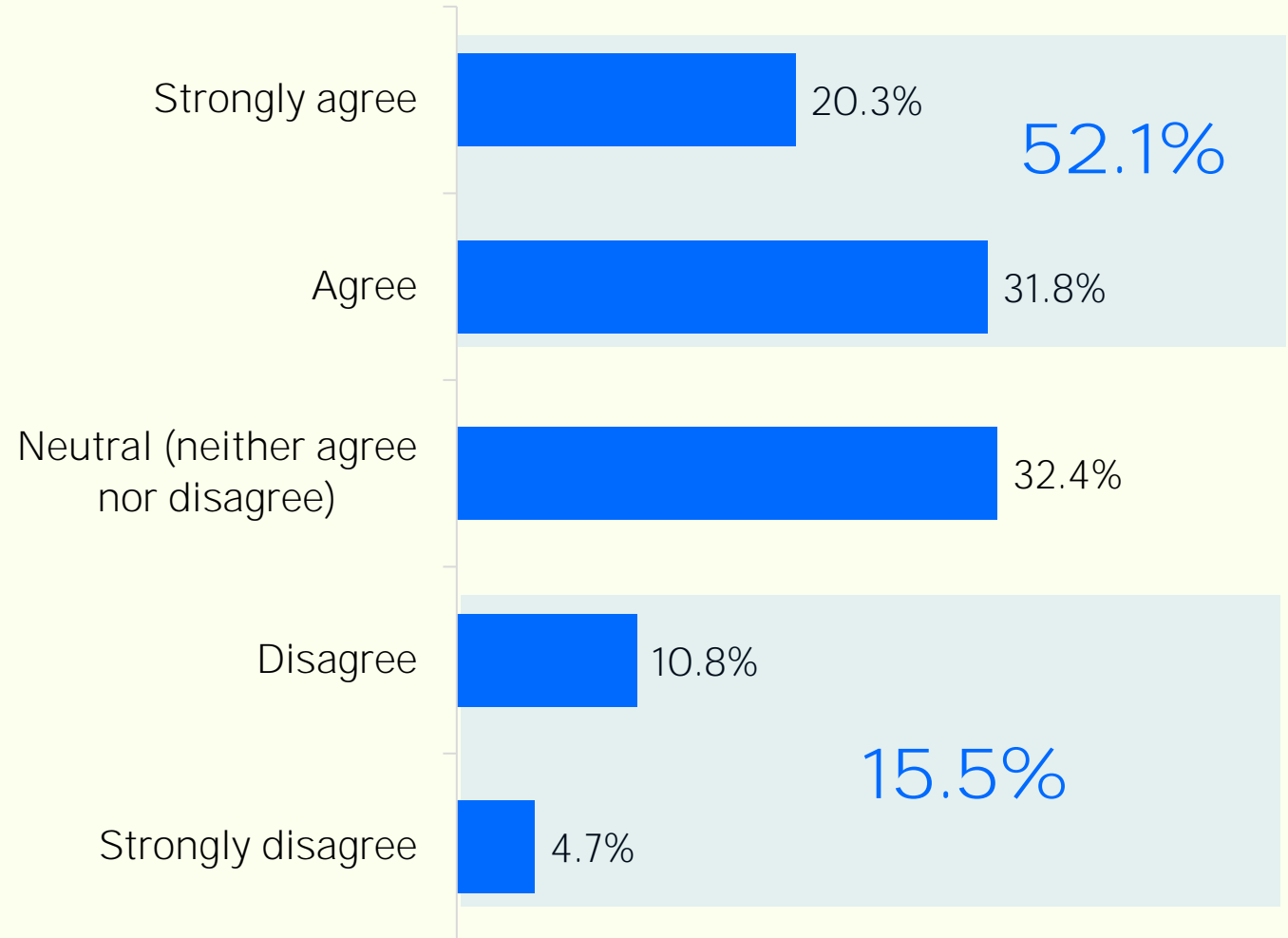
Millennial age travelers are the likeliest to feel now is a good time to spend.

Affluents and urbanites exceed others in feeling positively about travel spending in the moment.

# A Significant Sense of Economic Uncertainty Exists...

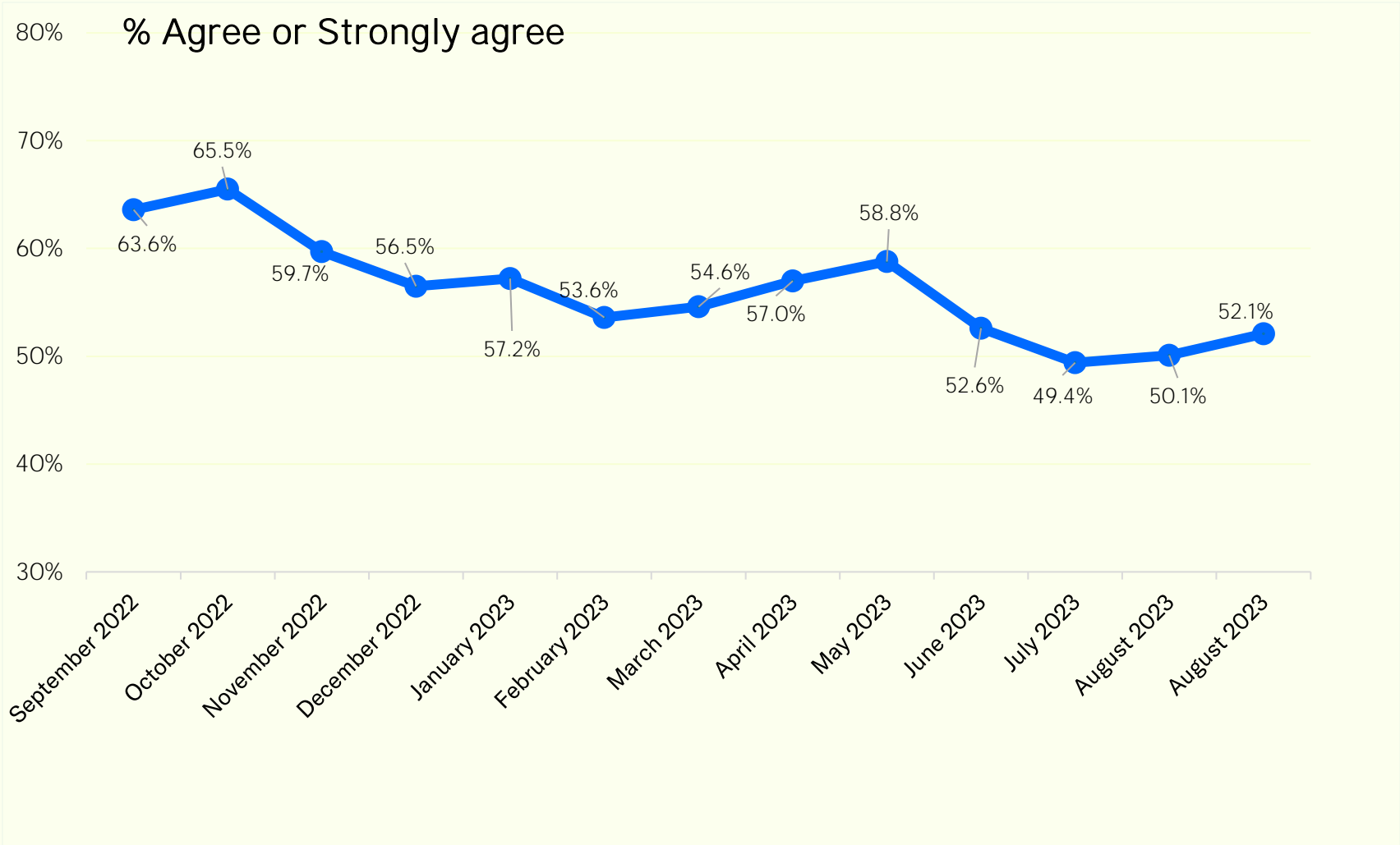
## Question:

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



# ...And Increased Slightly this Month.

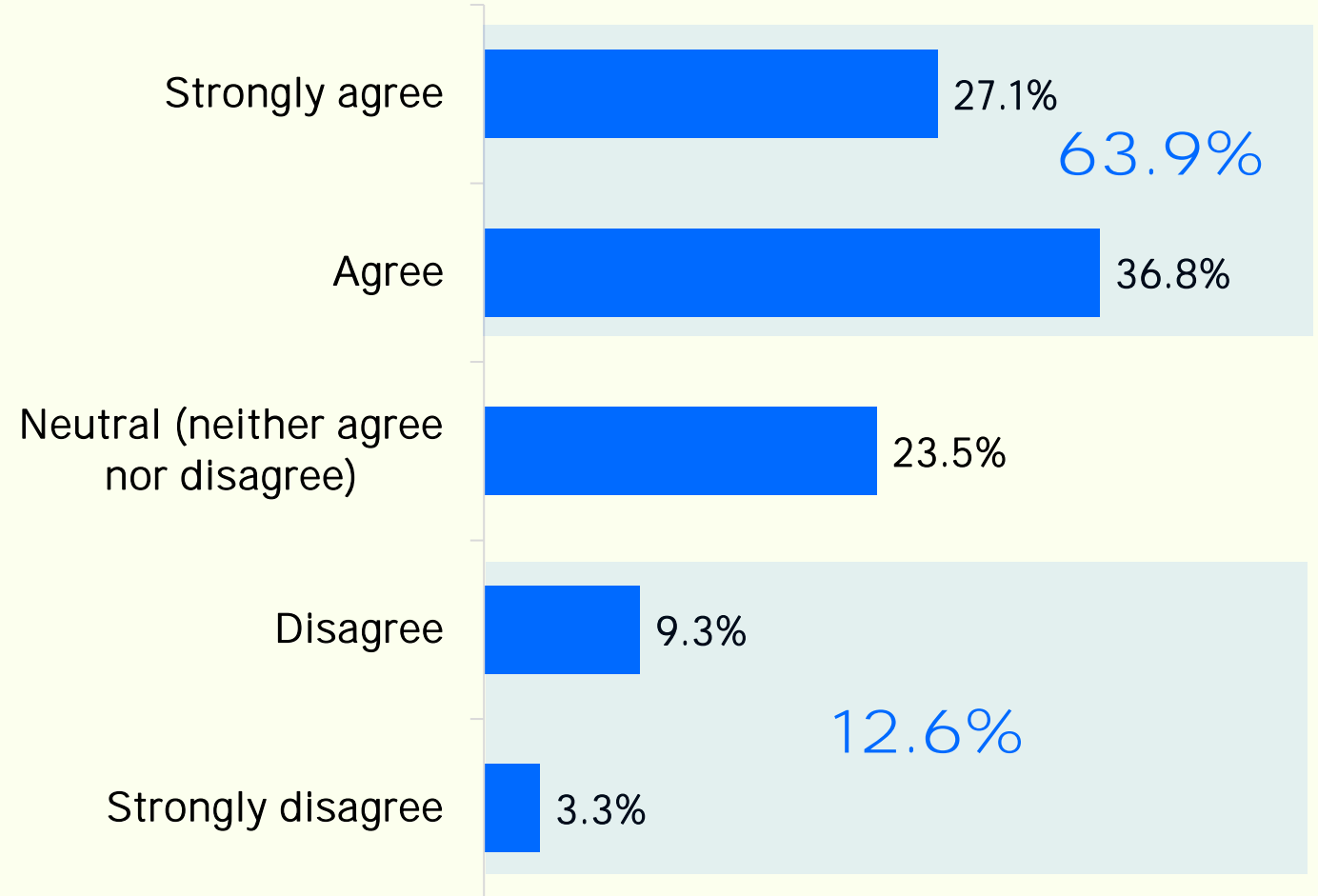
Statement:  
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



# Recession Fears are Driving Increasing Spending Caution.

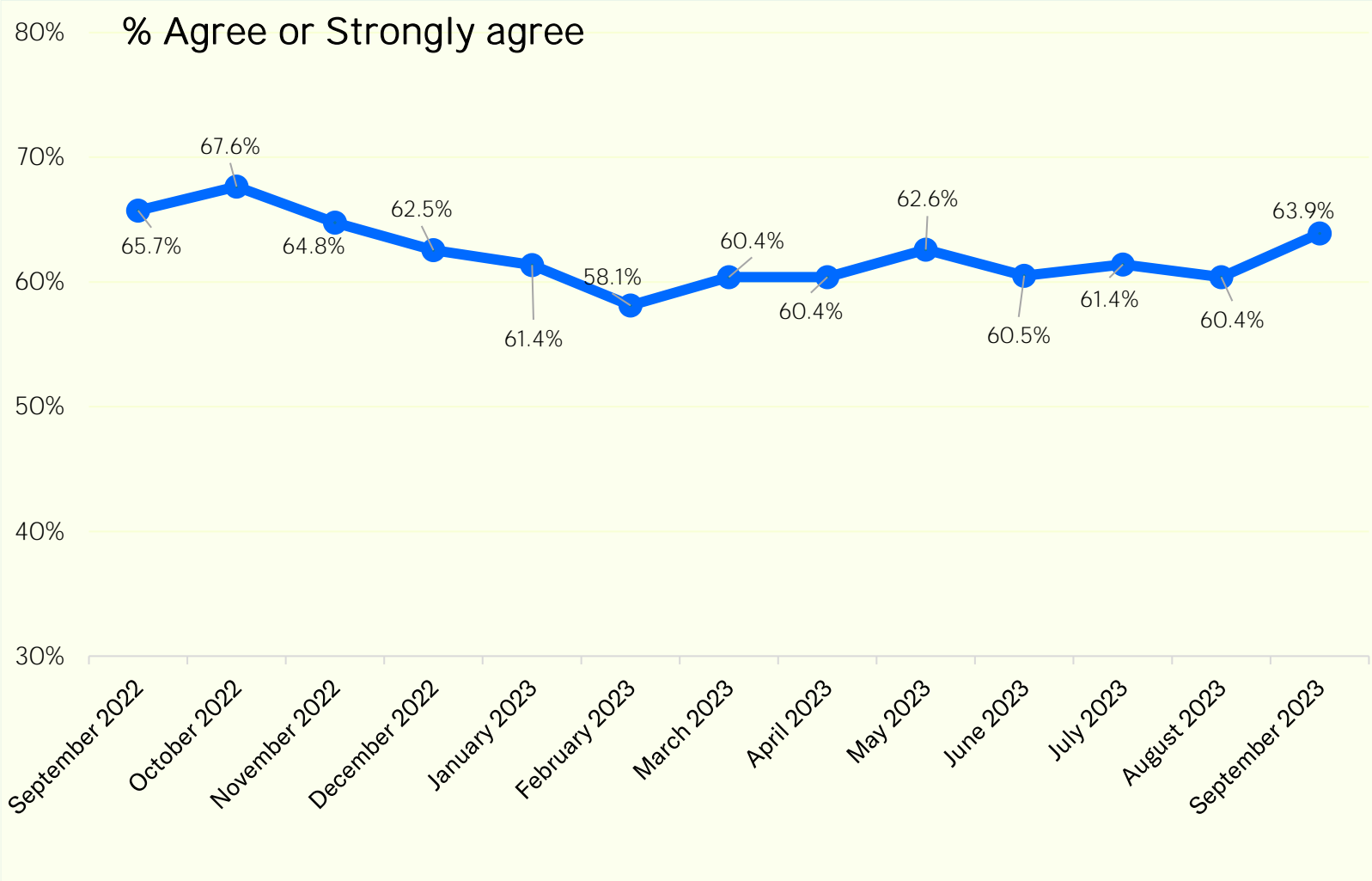
## Statement:

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



# This Spending Caution Worsened this Month

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

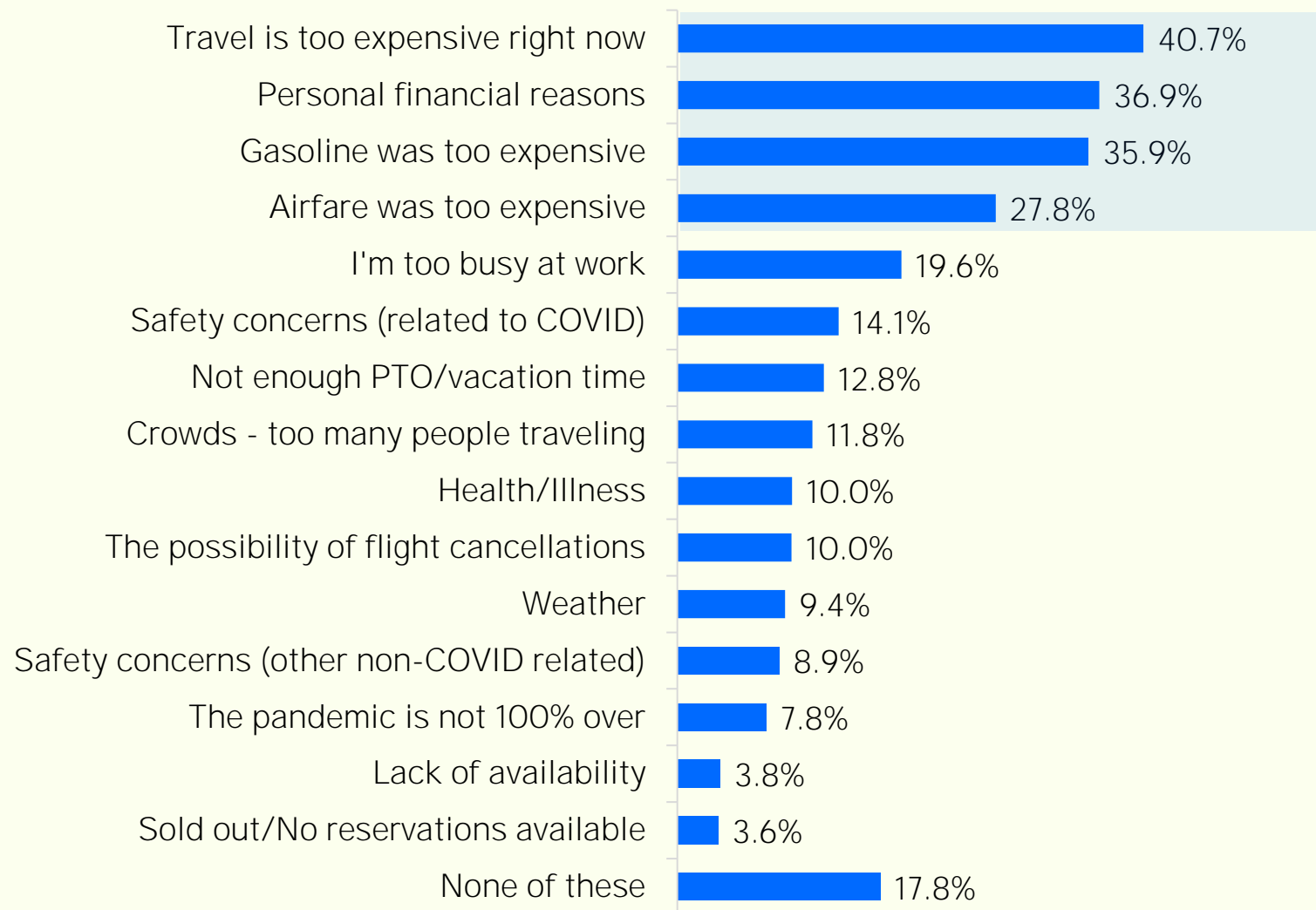




# High Costs Remain the Top Impediment to Travel

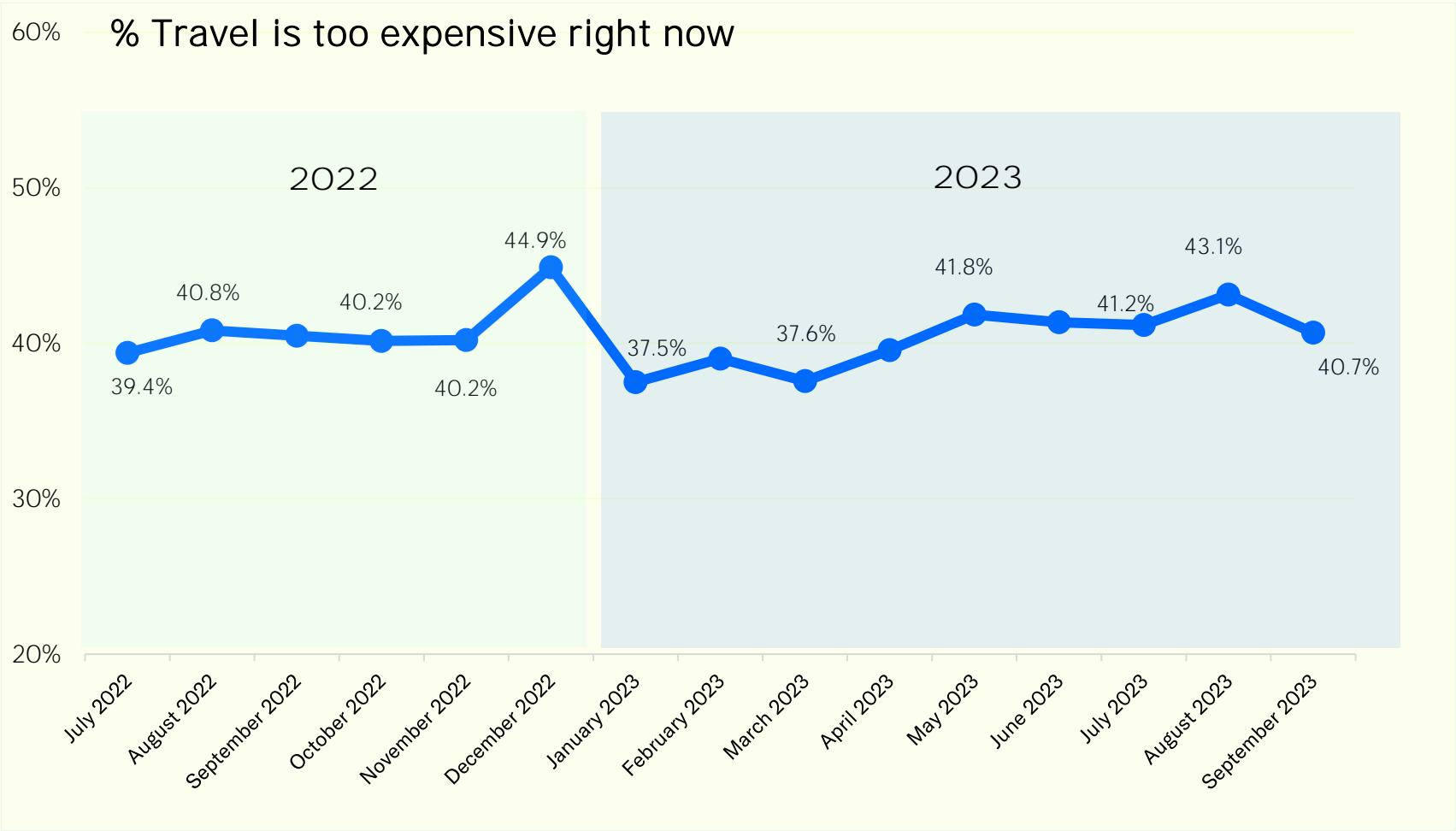
## Question:

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)



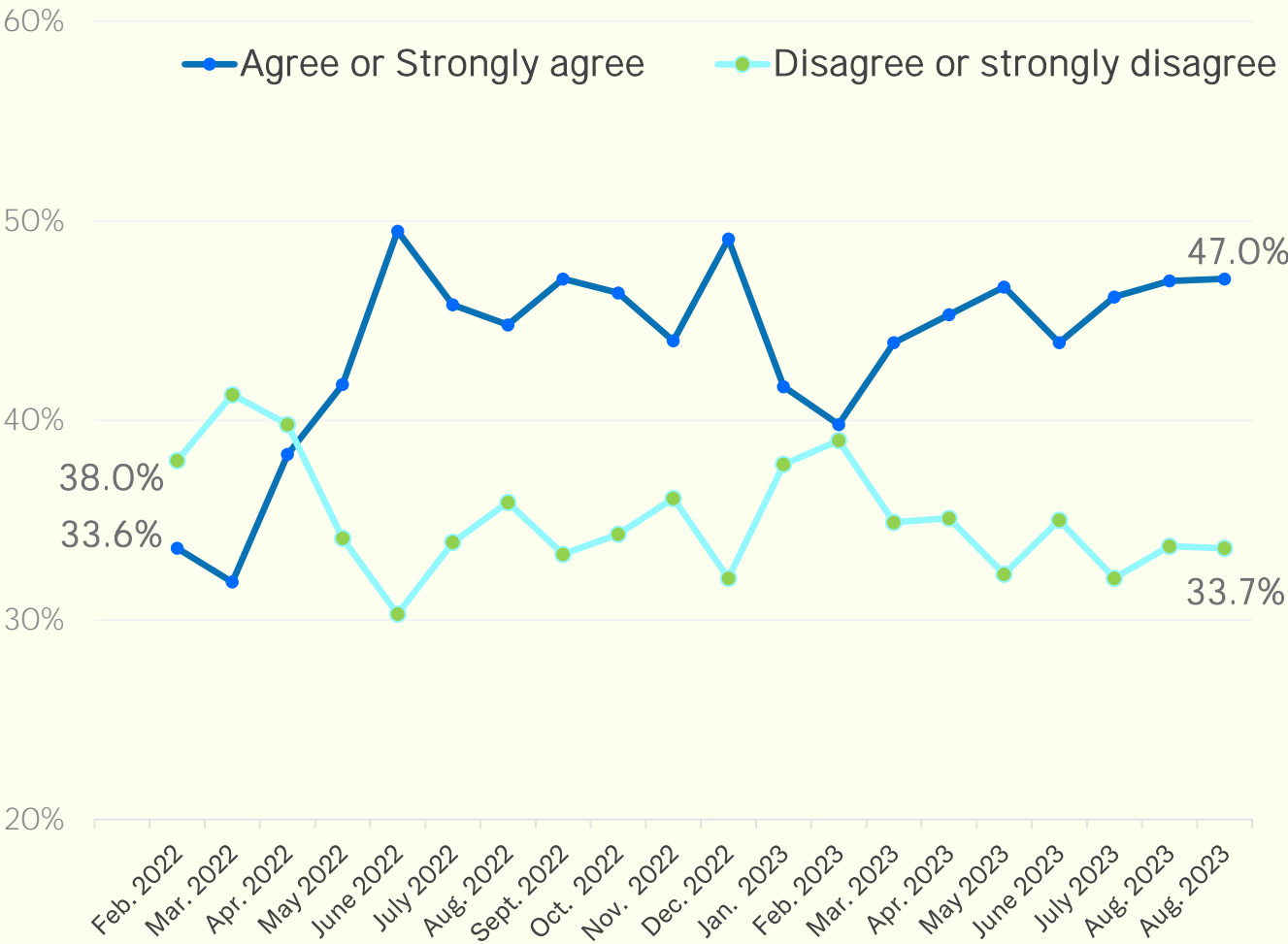
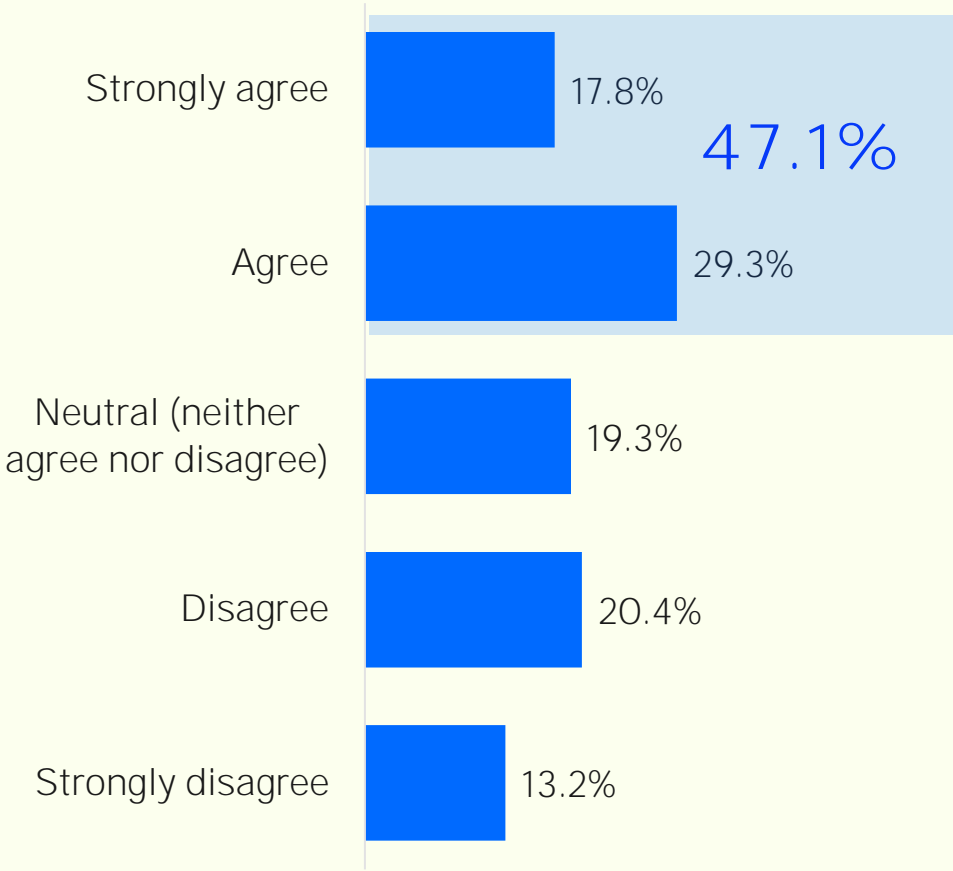
# There was Slight Improvement in Travel being too Expensive Acting as a Deterrent

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)



# Nearly Half Say High Travel Prices Kept them from Traveling Last Month

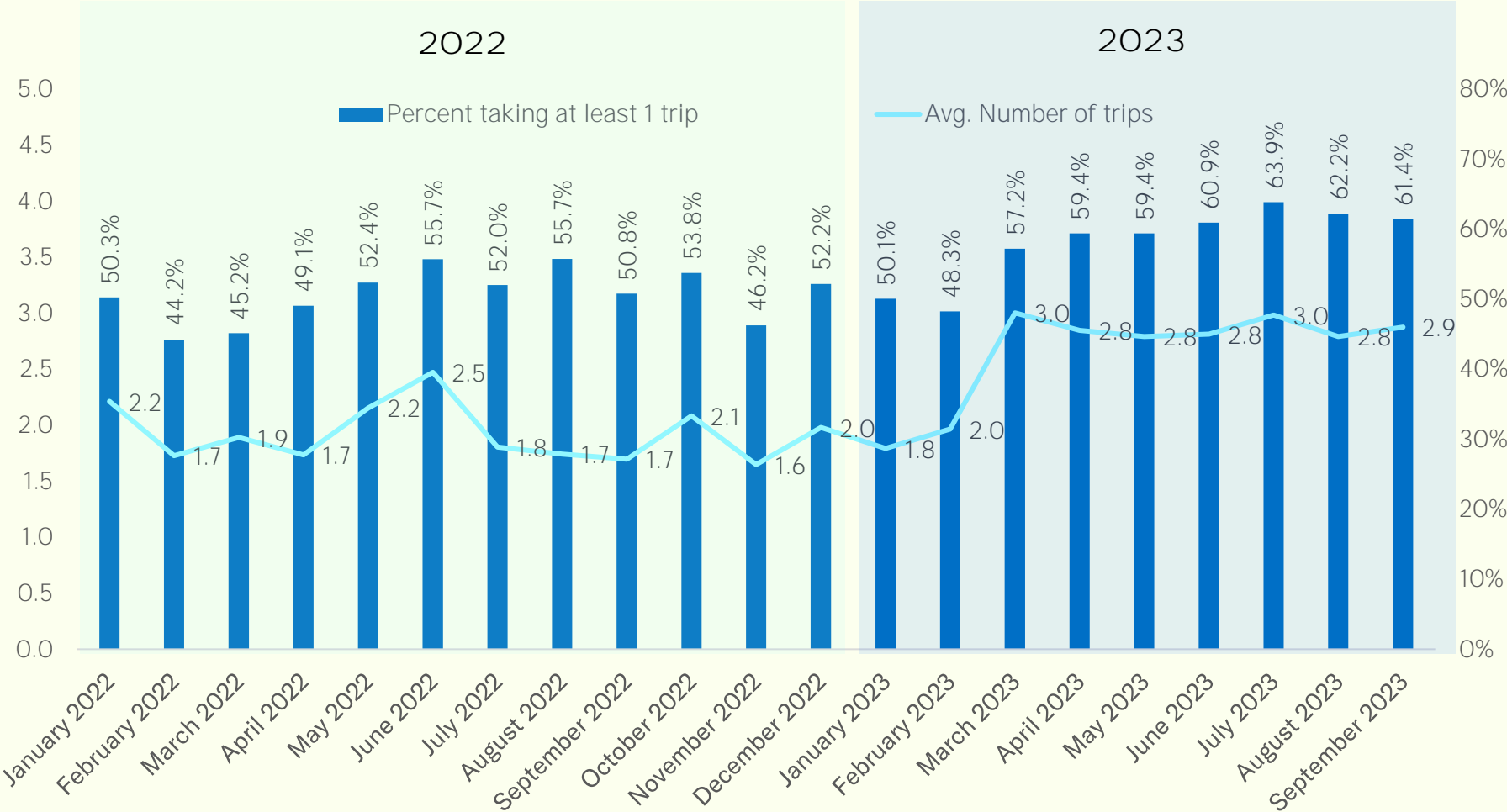
Statement:  
High travel prices have kept me from traveling in the past month.



Travel headwinds continue from high prices and spending caution resulting from recession fears. The single biggest impediment to travel right now is high costs.

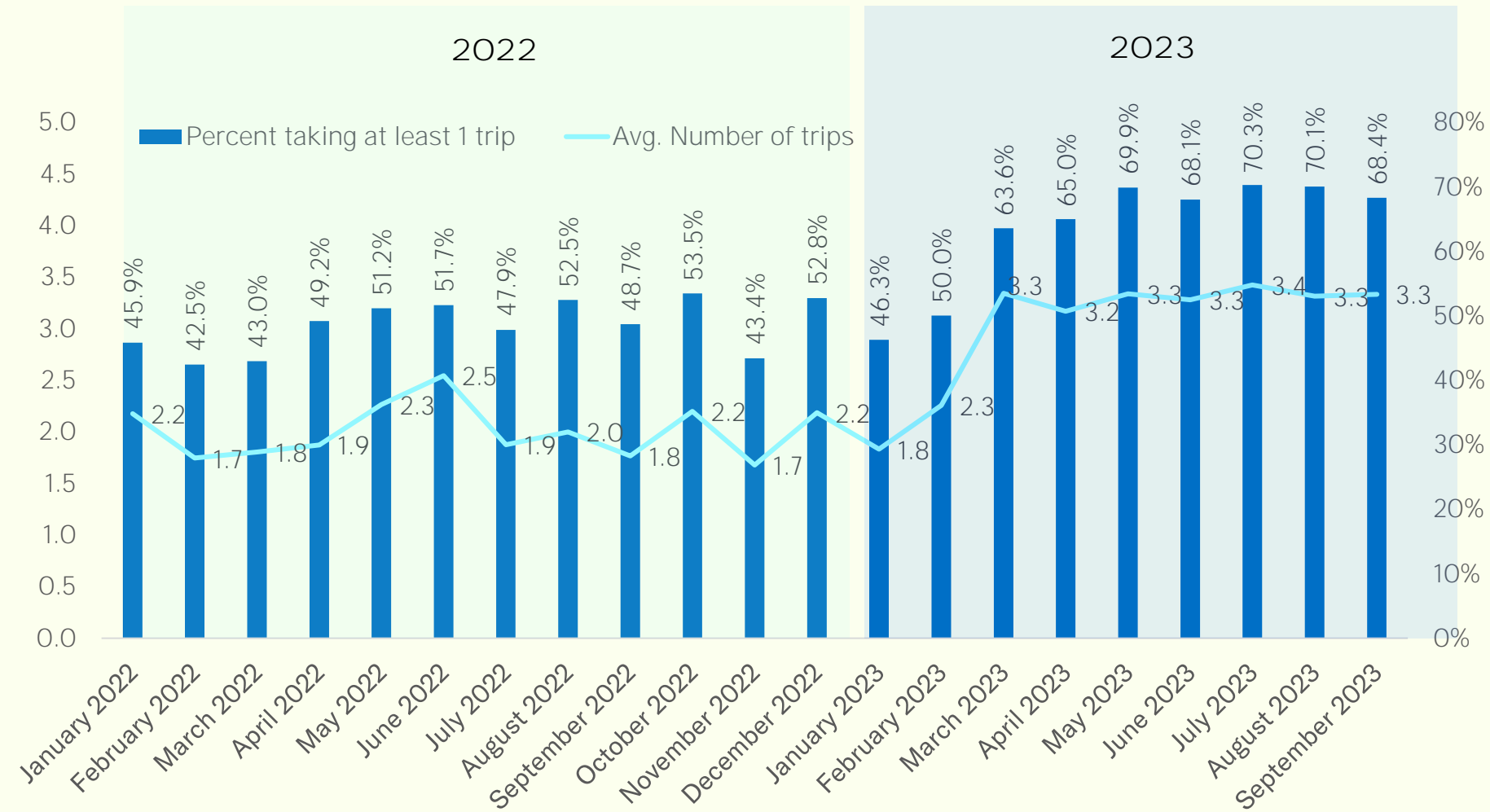
# Still, Overnight Trip Volume Remains Robust

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



# Leisure 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?



Thus far in 2023, travel volume has withstood the pressures of economic anxiety, driven by consumers prioritization of travel.



# Looking Forward

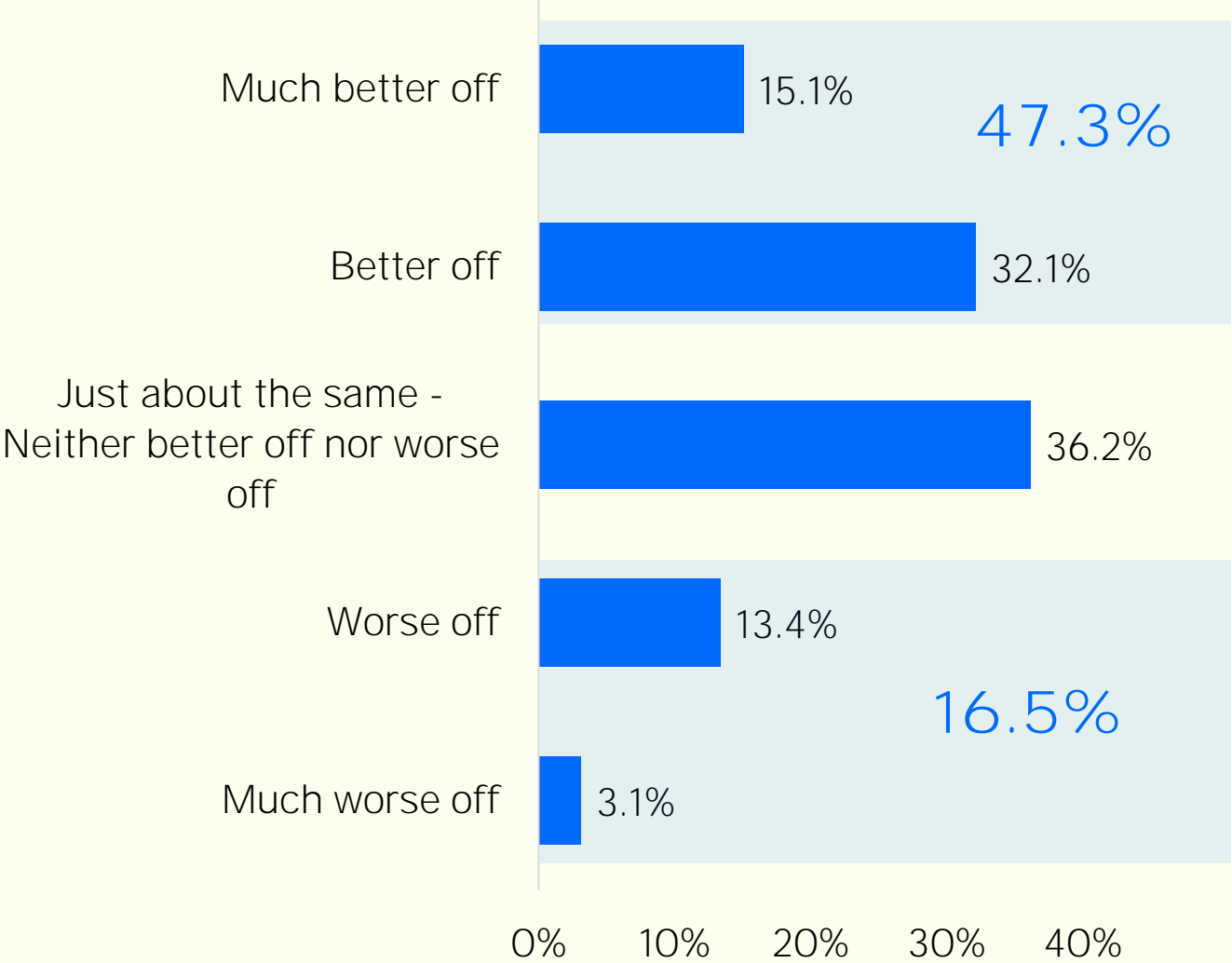
**Future Partners**



# Financial Optimism Remains Present

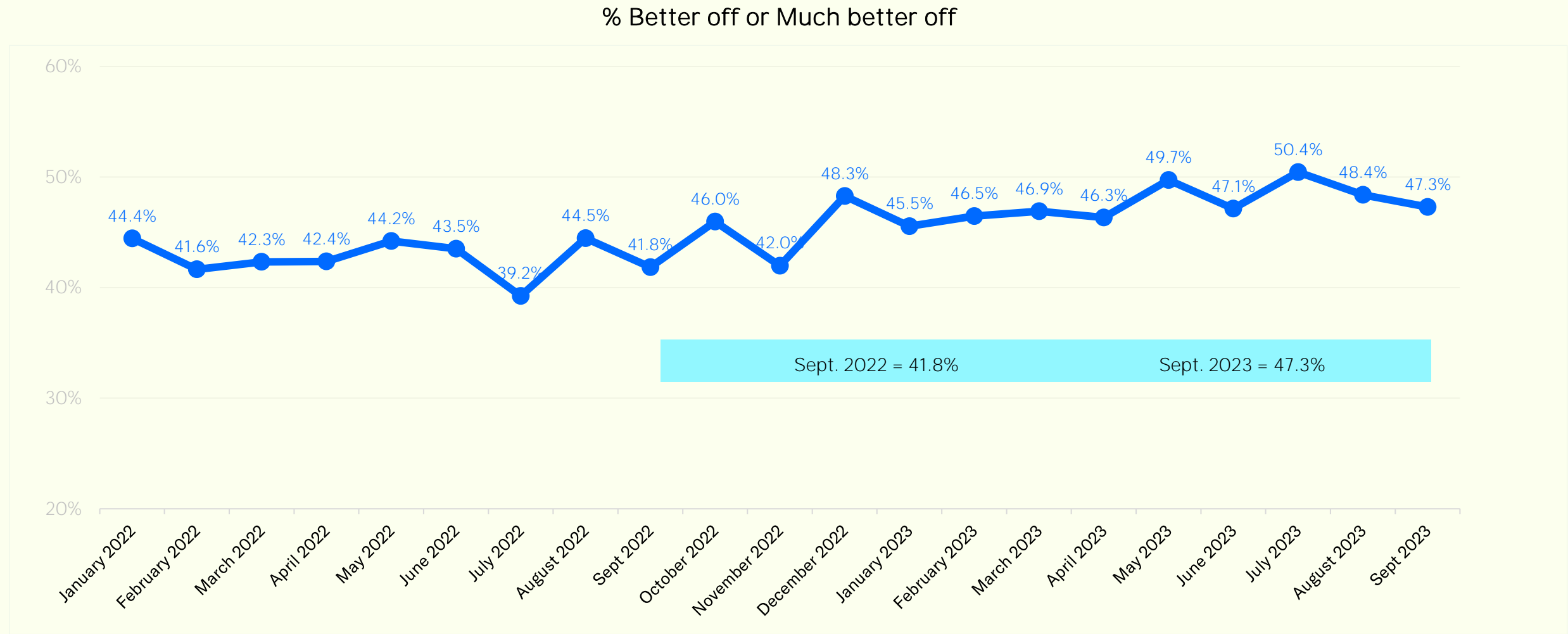
Question:

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?



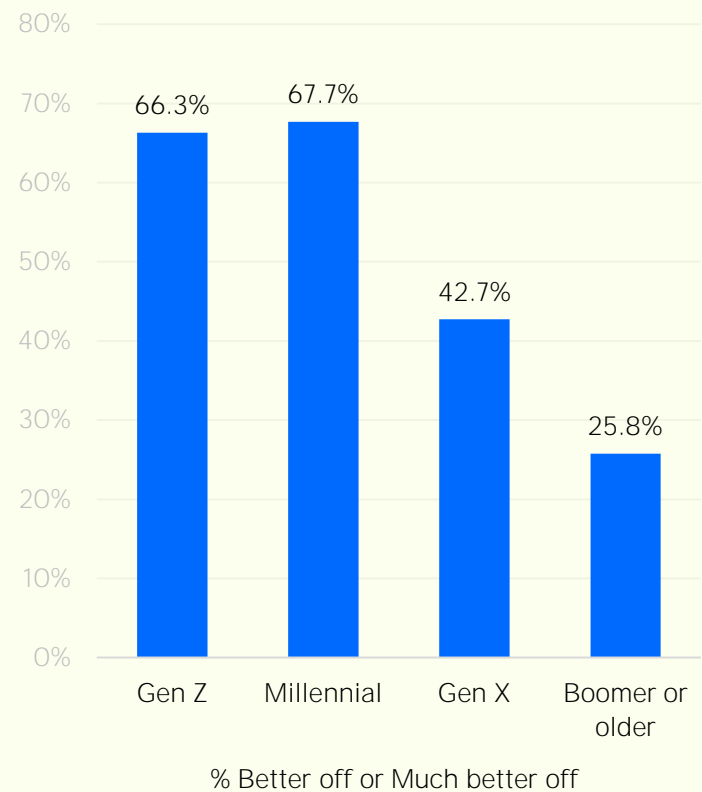
# Financial Optimism is Down Again this Month, but Up Compared to One Year Ago

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?

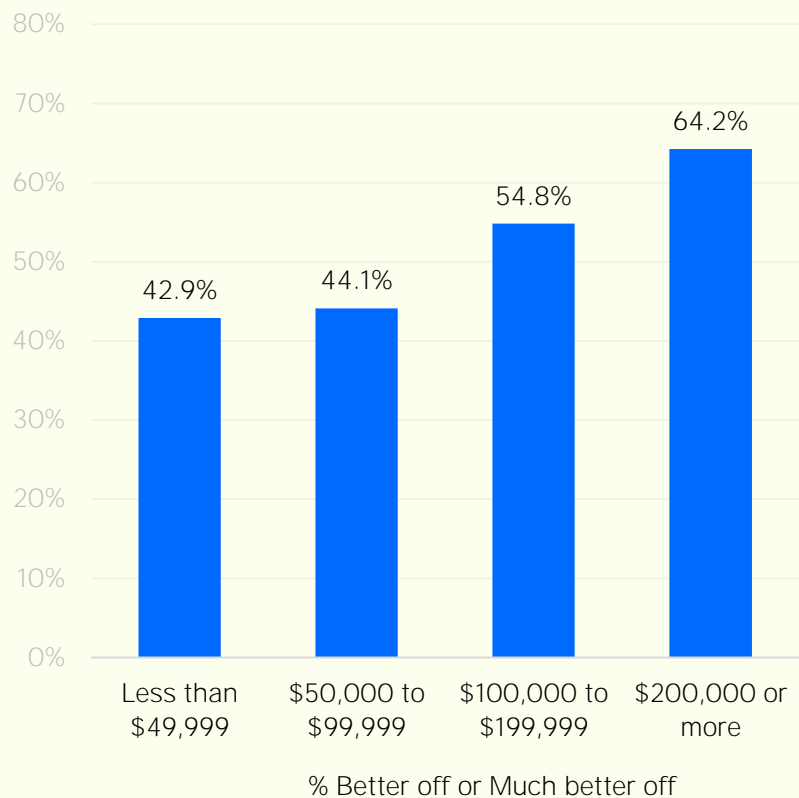


# Financial Optimism is Alive & Well among Younger Travelers and City Dwellers

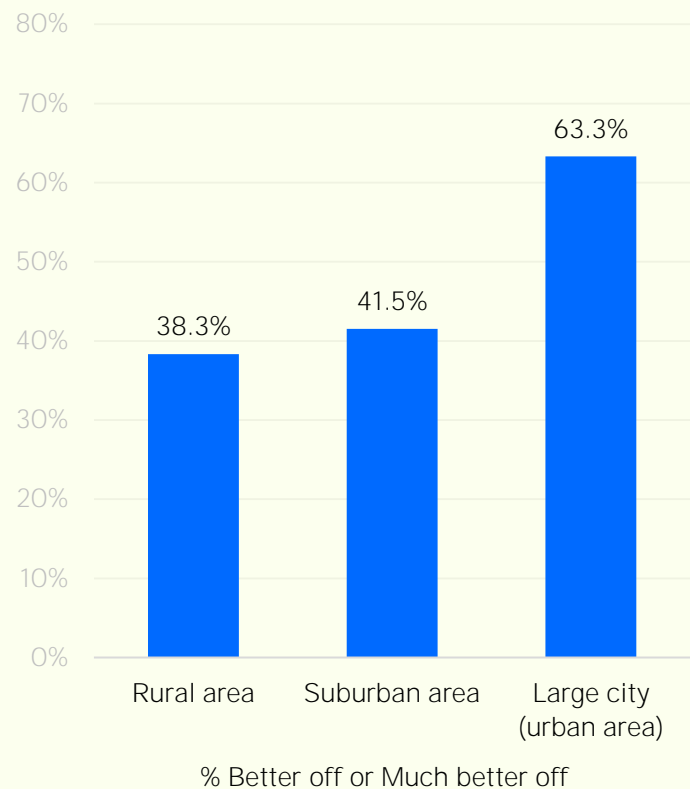
By Generation



By Annual Household Income



By Place of Residence



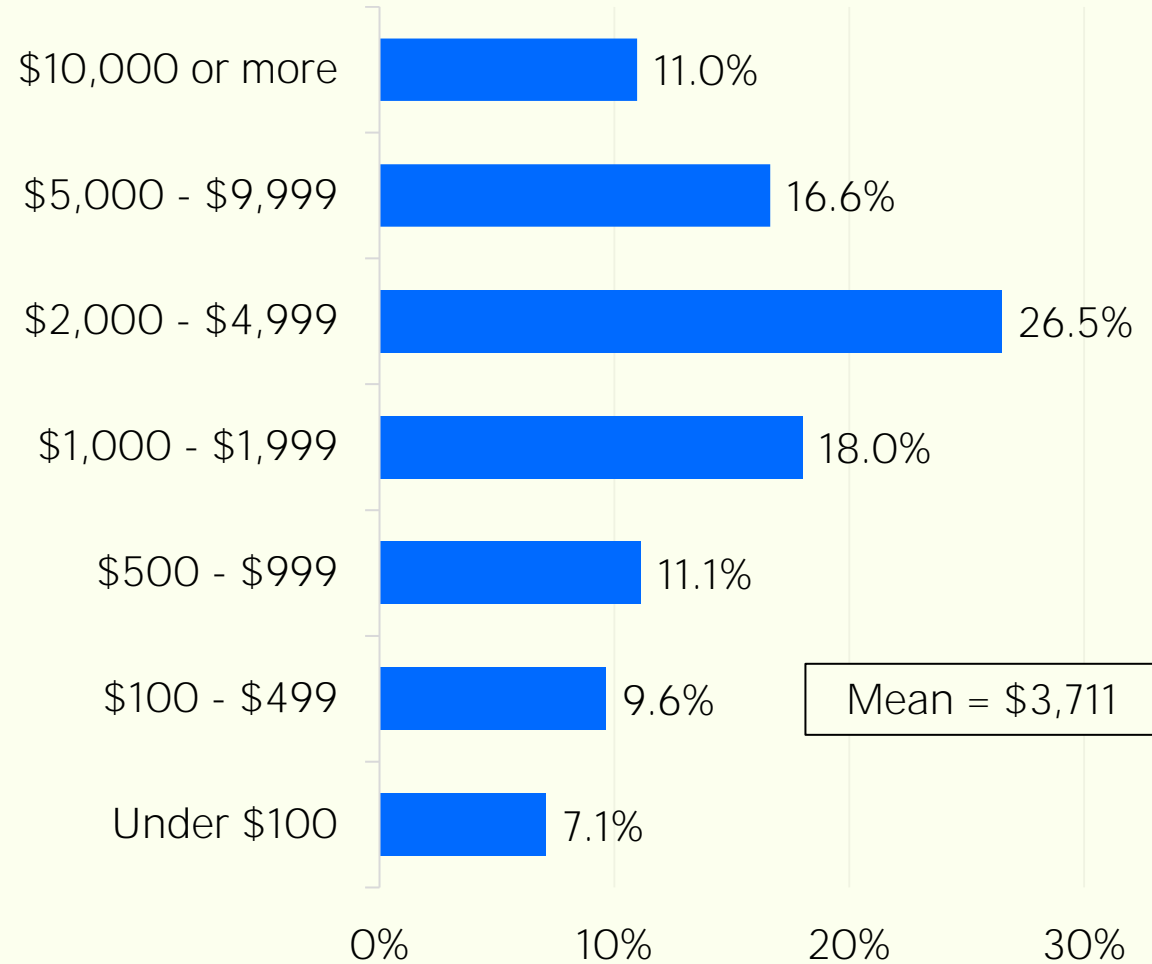
# Travel Budgets Remain Tight

## 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):

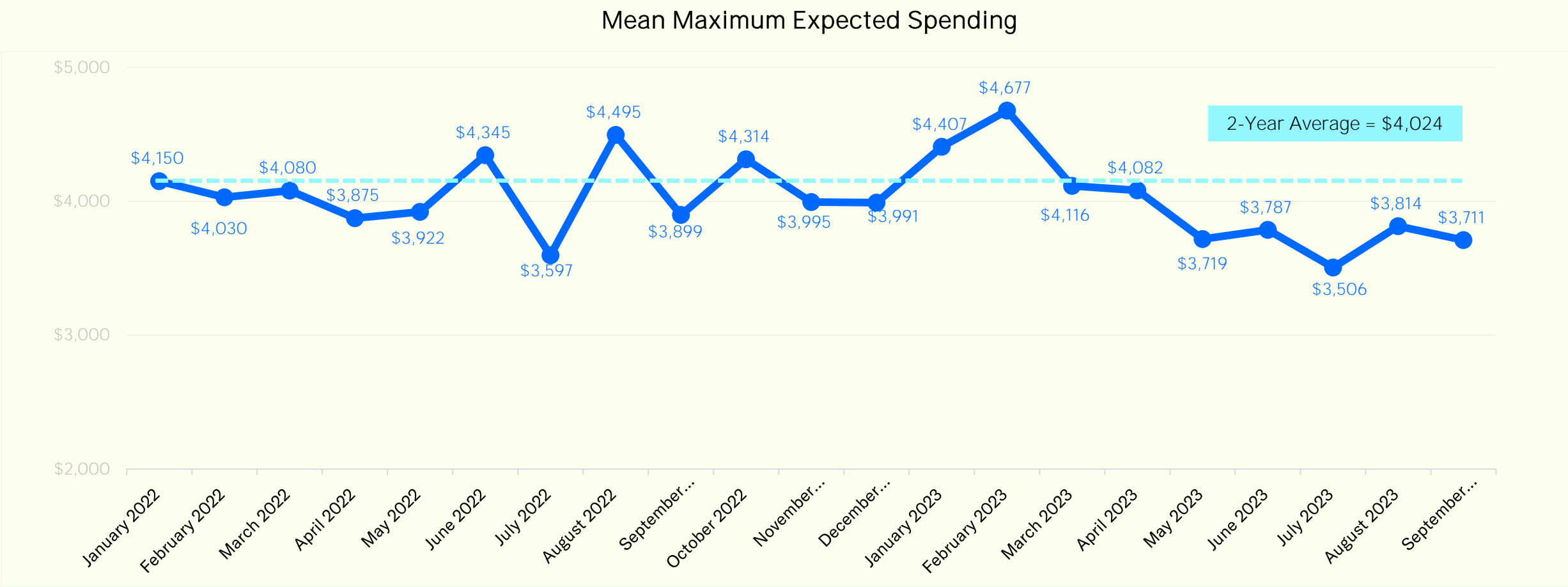
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# Travel Budgets Declined Slightly This Month and are Below the 2-Year Average

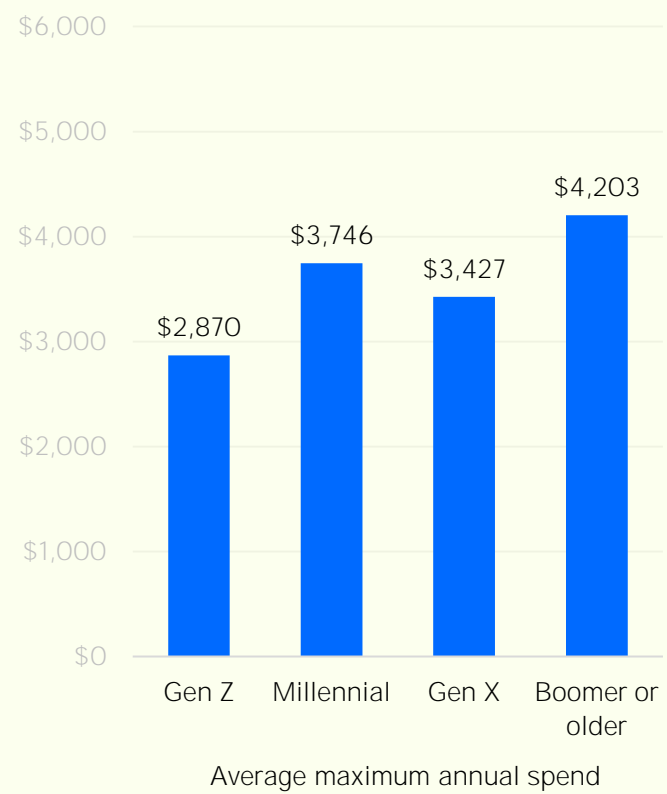
## Question:

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):

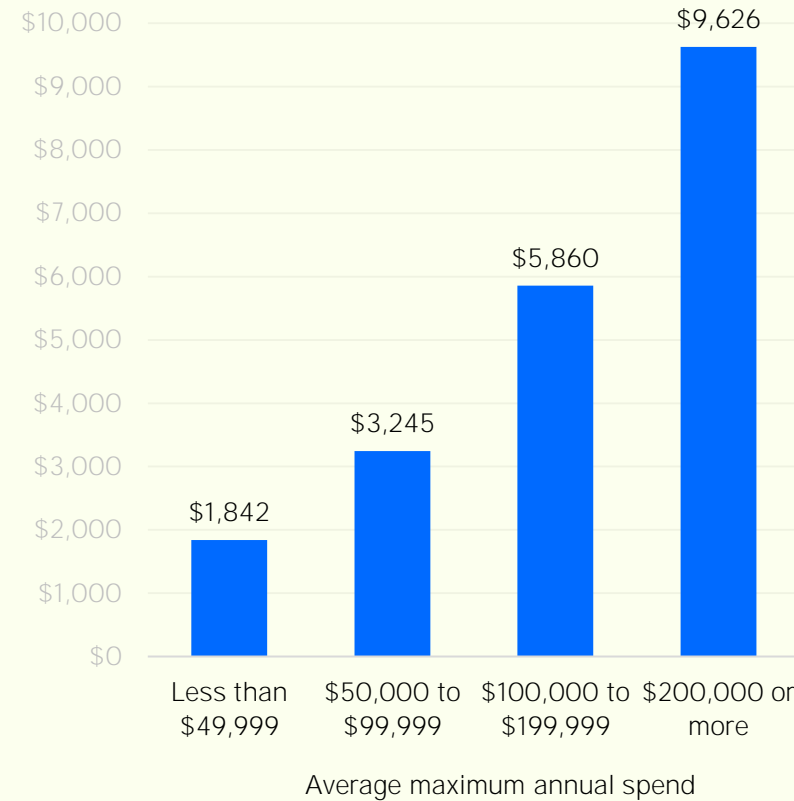


# Baby Boomers and High-Earners Have the Biggest Travel Budgets

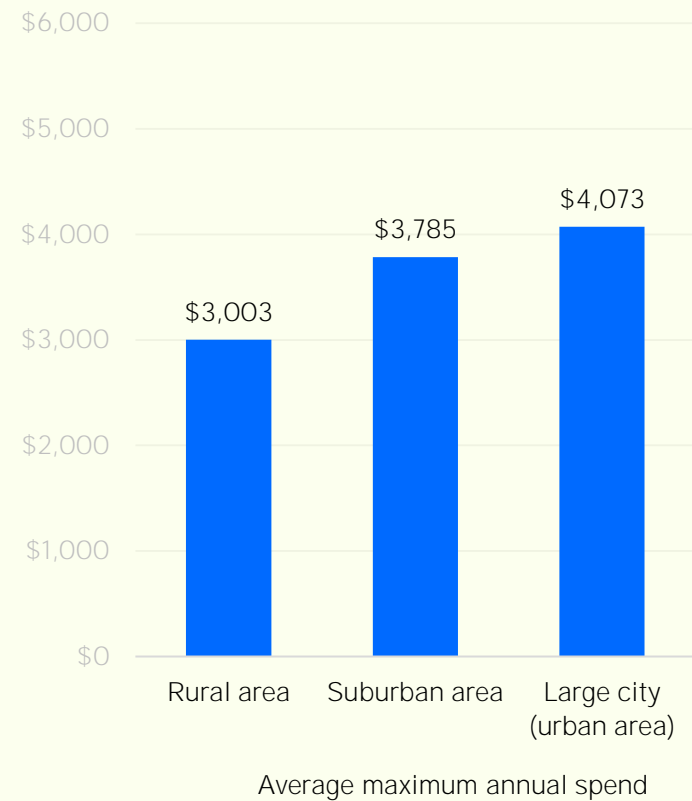
By Generation



By Annual Household Income



By Place of Residence



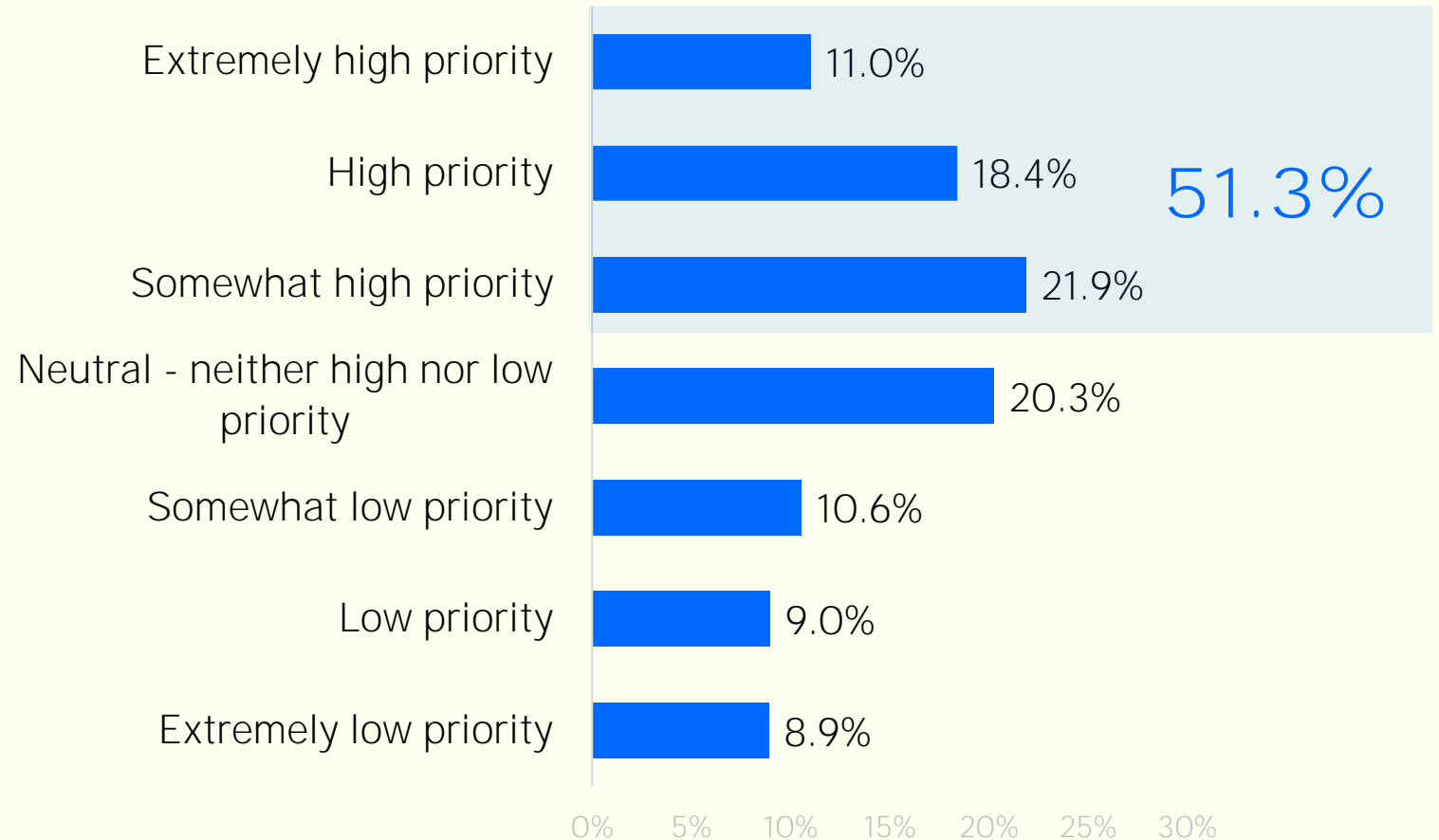


# Over Half Intend to Make Leisure Travel a Spending **Priority** in the next three months...

## 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.

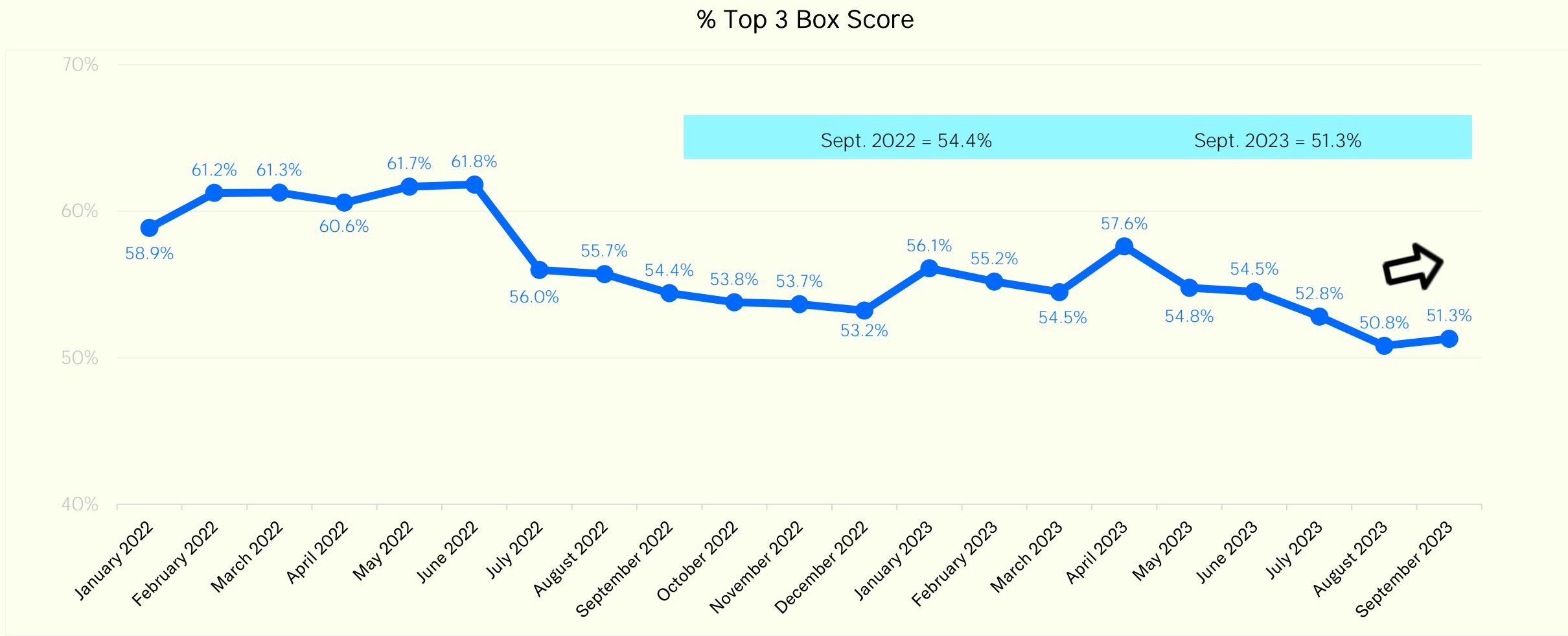
Leisure travel will be a(n)



# ...Although this is Down Somewhat from Last Year

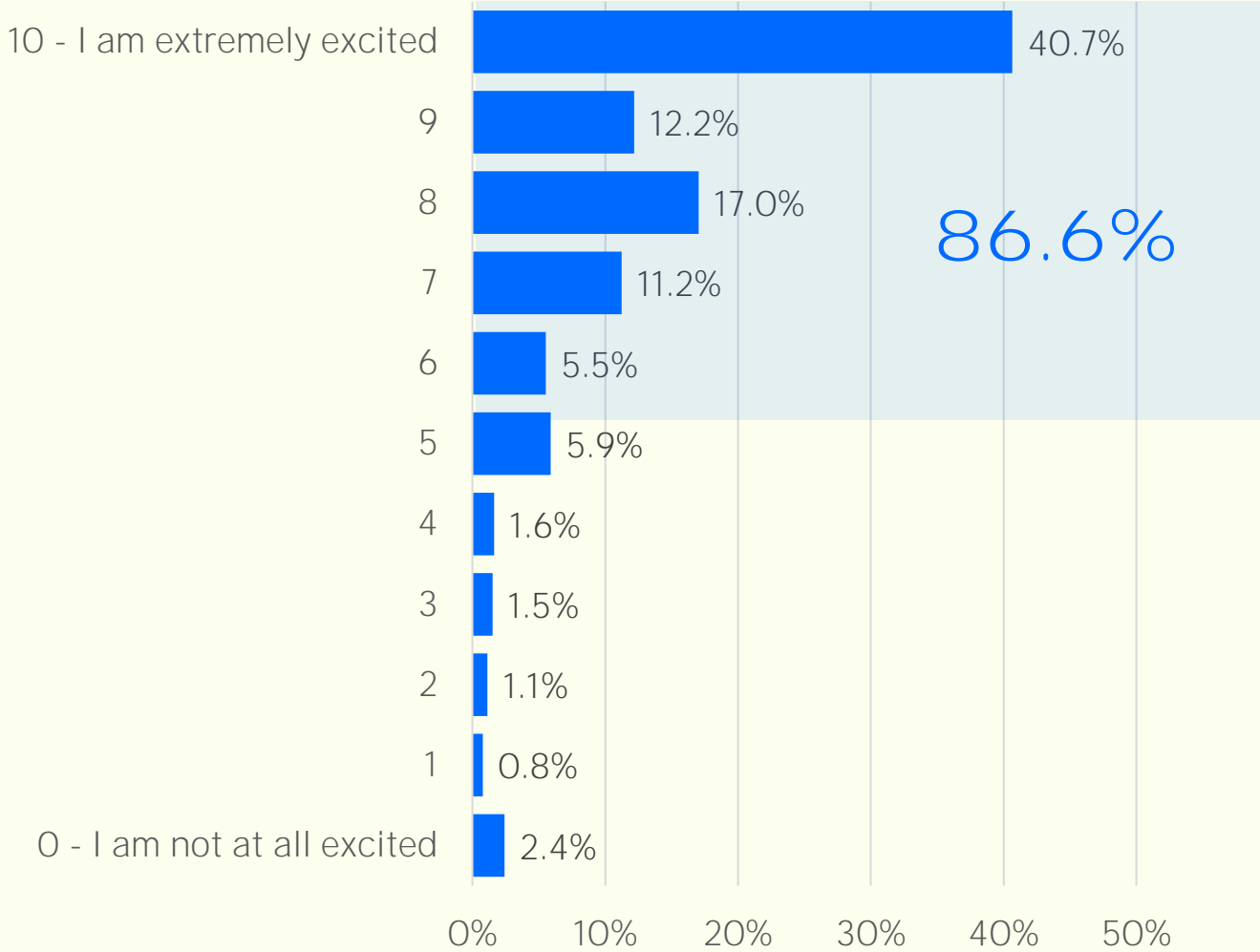
Question:  
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) \_\_\_\_\_.



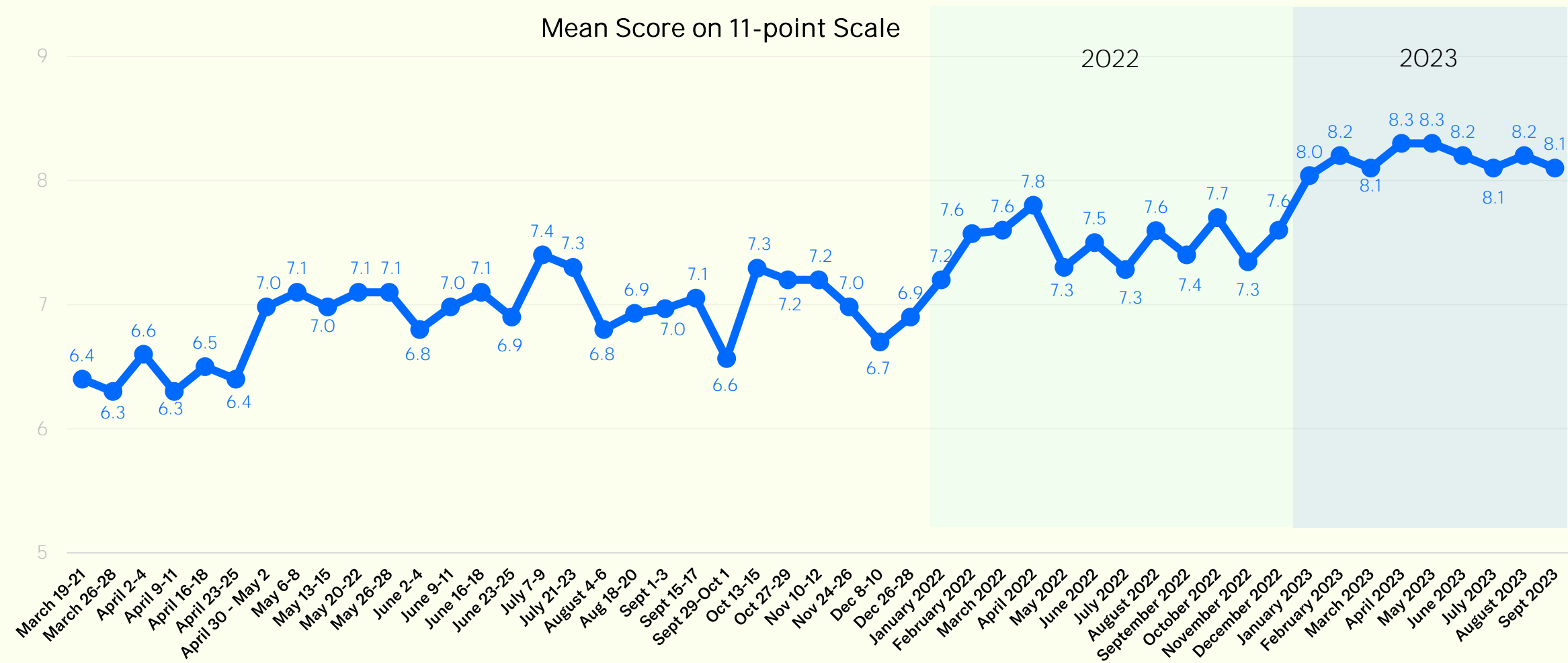
# Excitement for Travel Remains High

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



# Although Down Very Slightly this Month, Excitement for Travel Remains at Record Levels

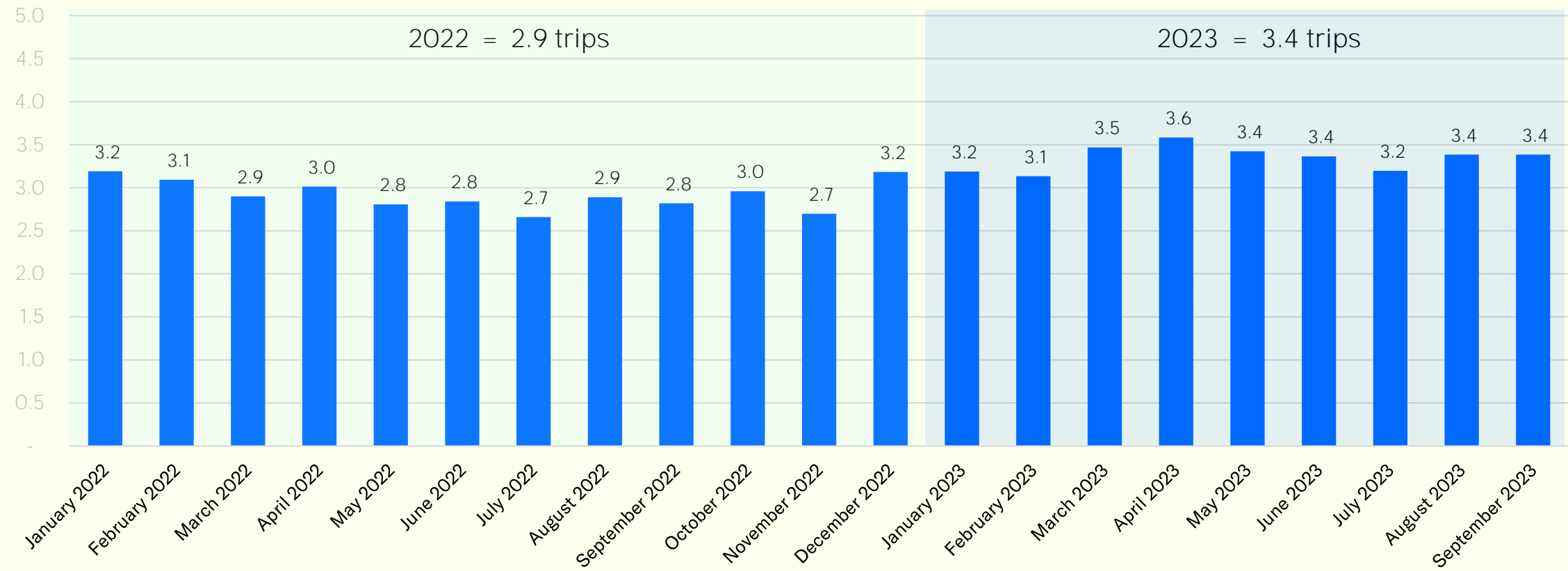
Question:  
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Enthusiasm is Driving Expectations for More Travel

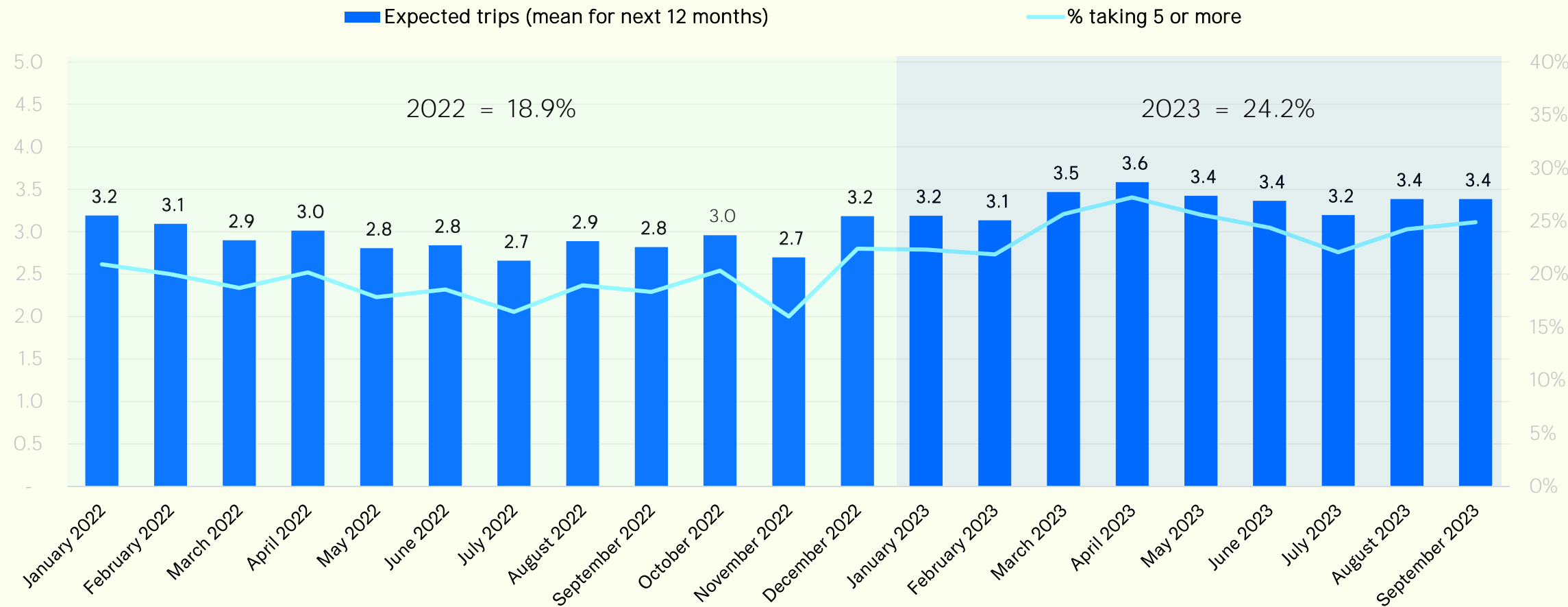
Question:  
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?

Expected Trips (Mean for Next 12 Months)



# More Americans are Joining the High Trip Volume Club

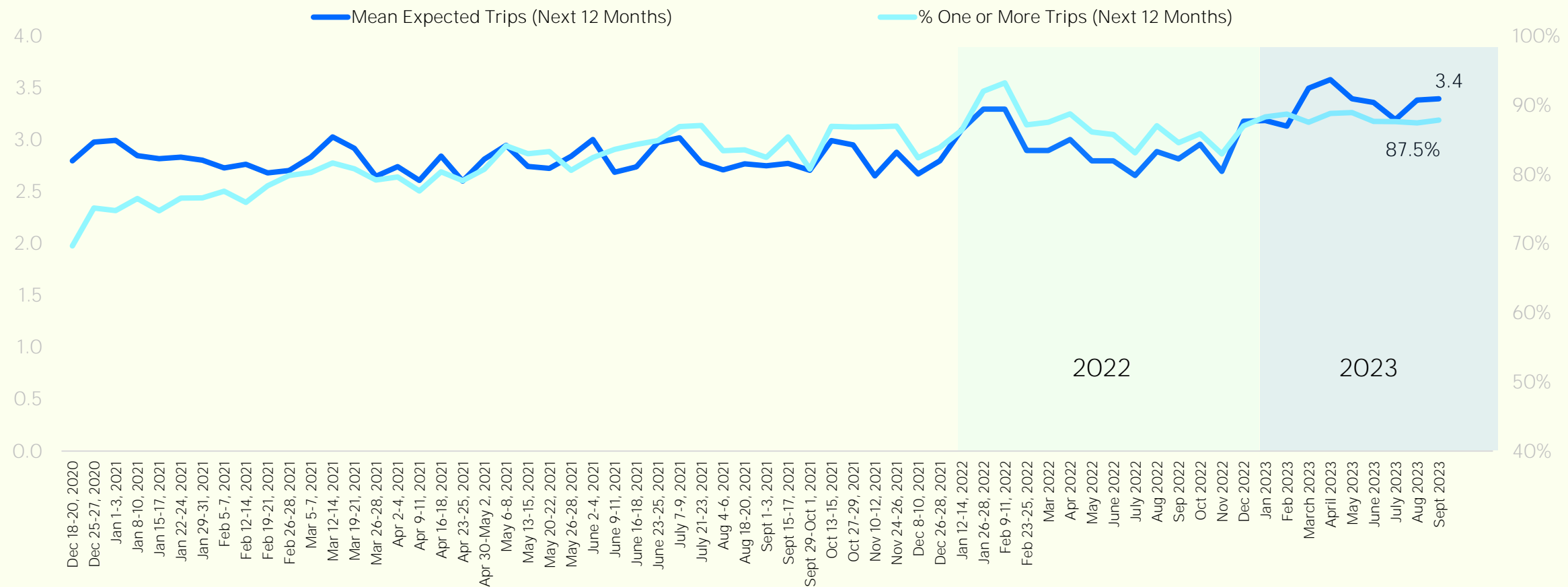
Question:  
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



# The Proportion of Americans Traveling Remains at Healthy Levels

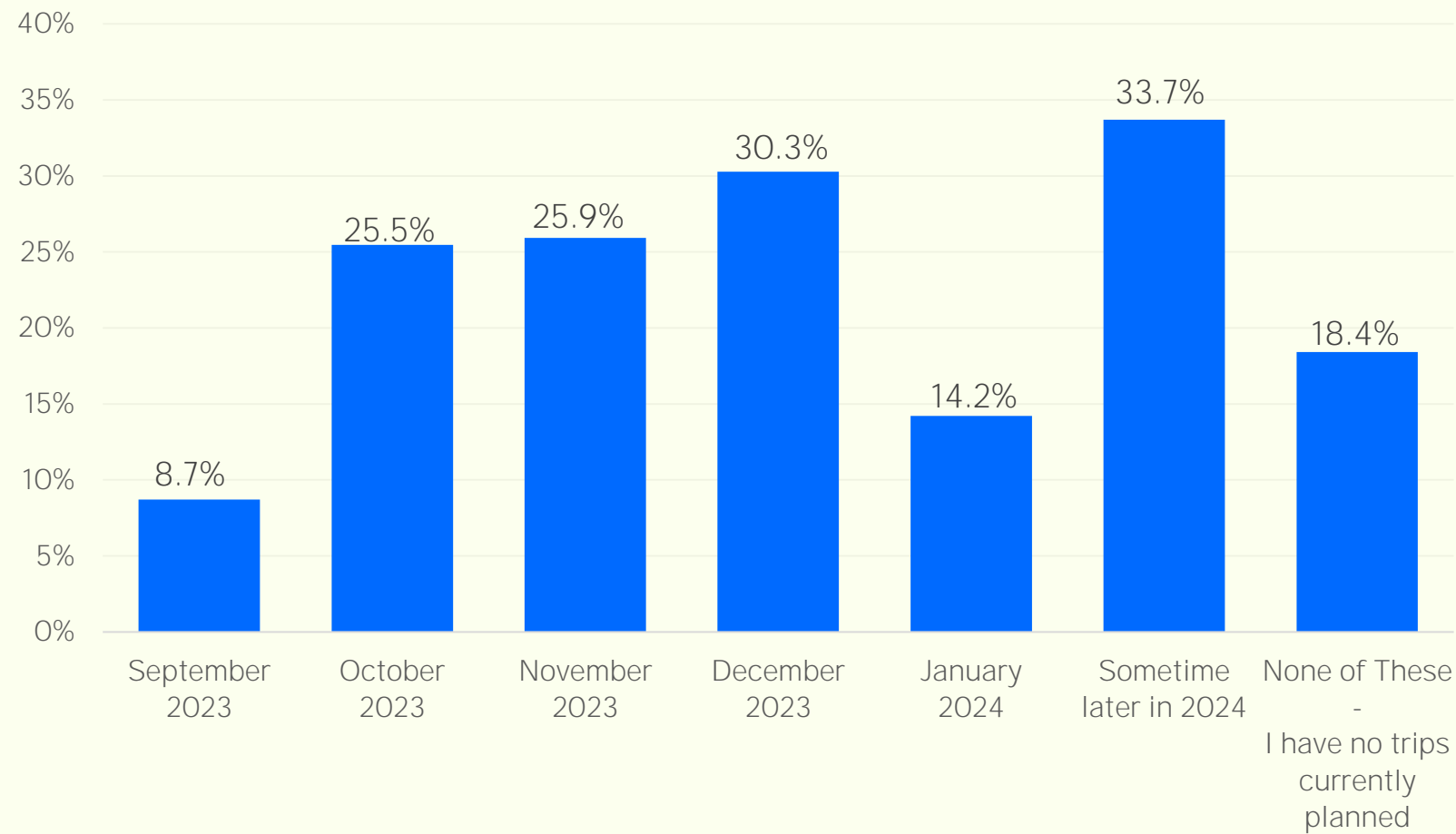
Question:

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



# It Looks like it will be a Robust Holiday Travel Season

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

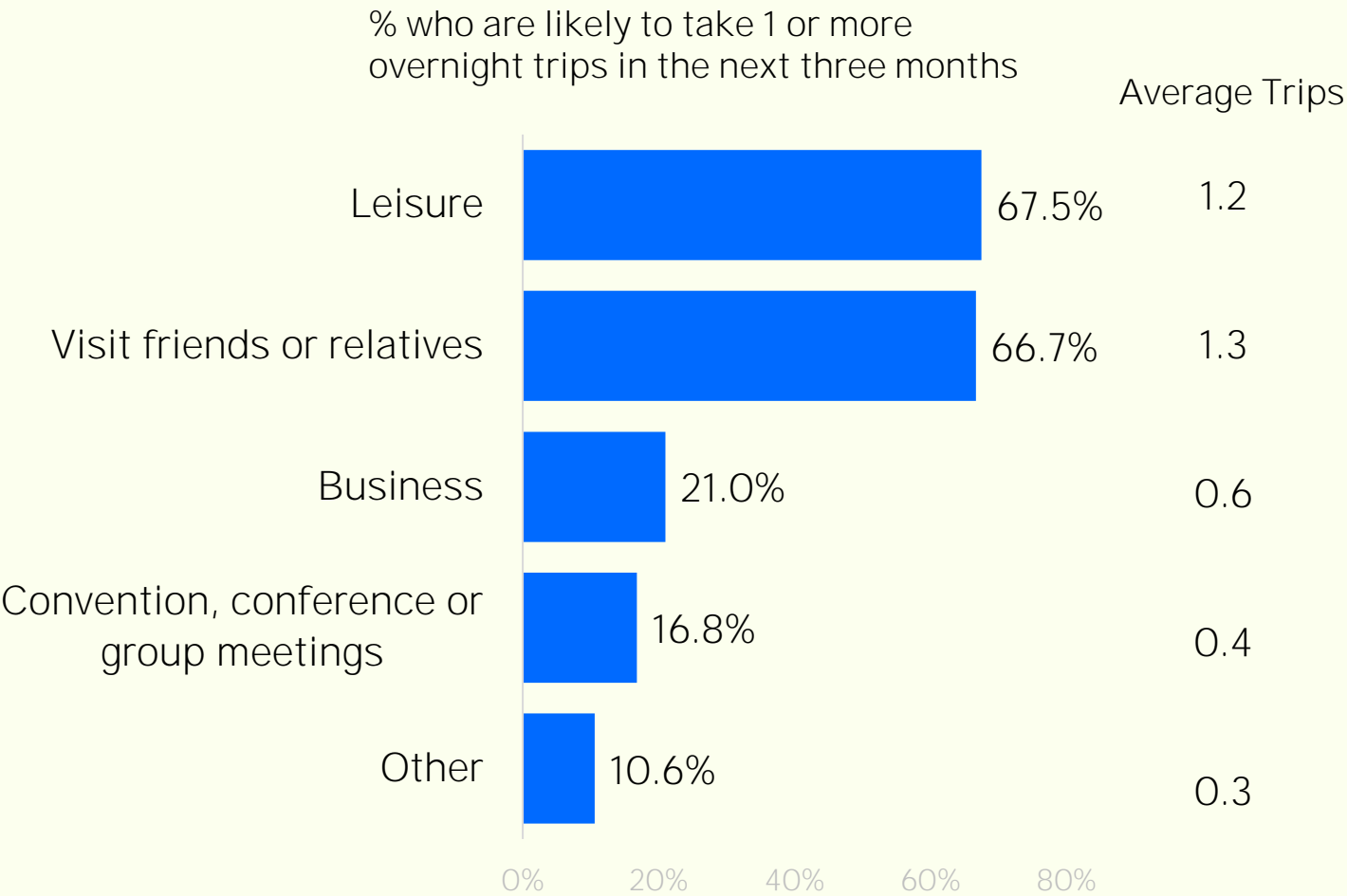




# Leisure Dominants, but the Business Travel Outlook for the Next 3 Months is also Strong

Question:

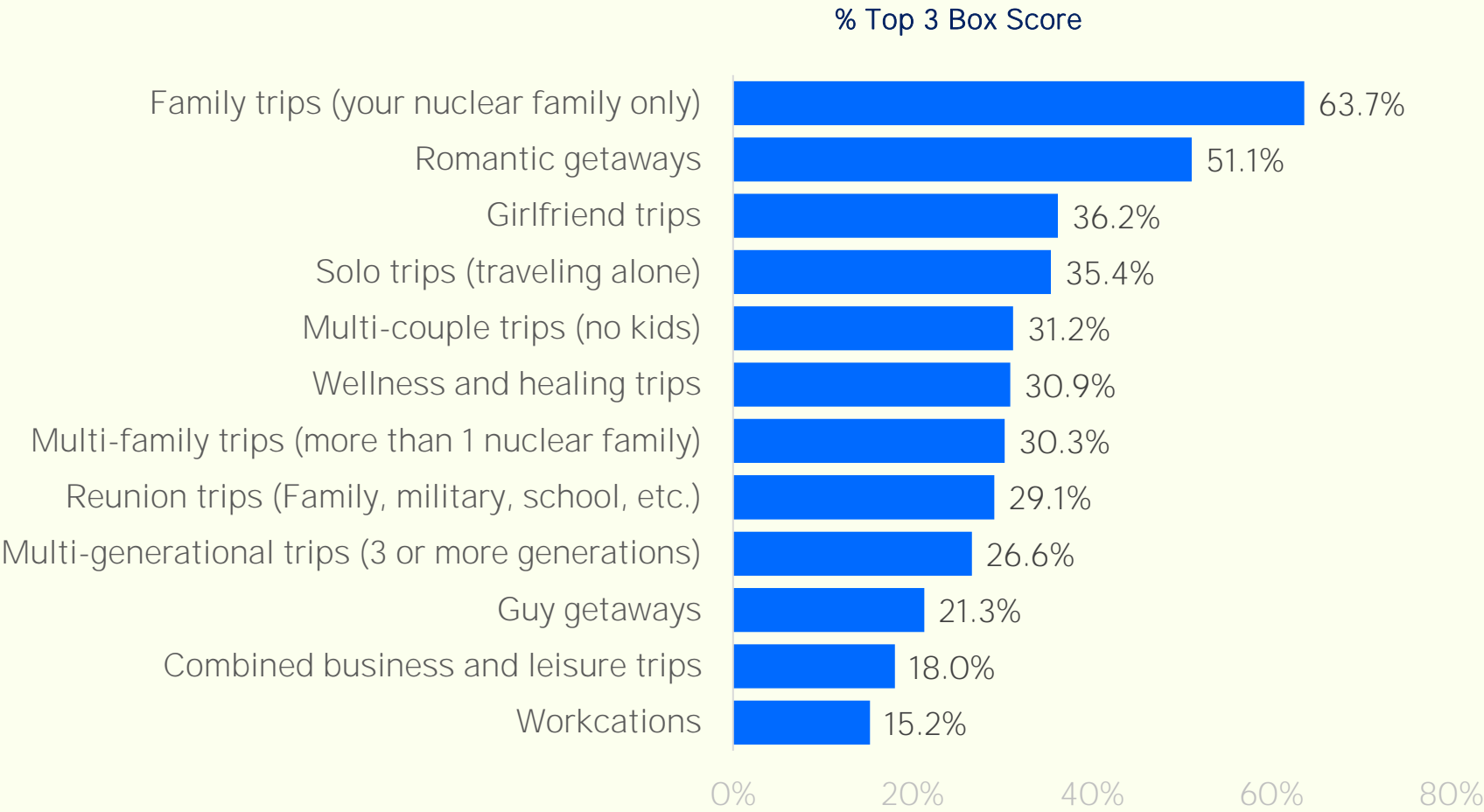
In the NEXT THREE (3) MONTHS, how many of each type of trip are you likely to take? (Select the correct number of each trip type)



# Trips to Connect with Family, Loved Ones, Friends and Themselves are the Travel Americans are Most Excited About

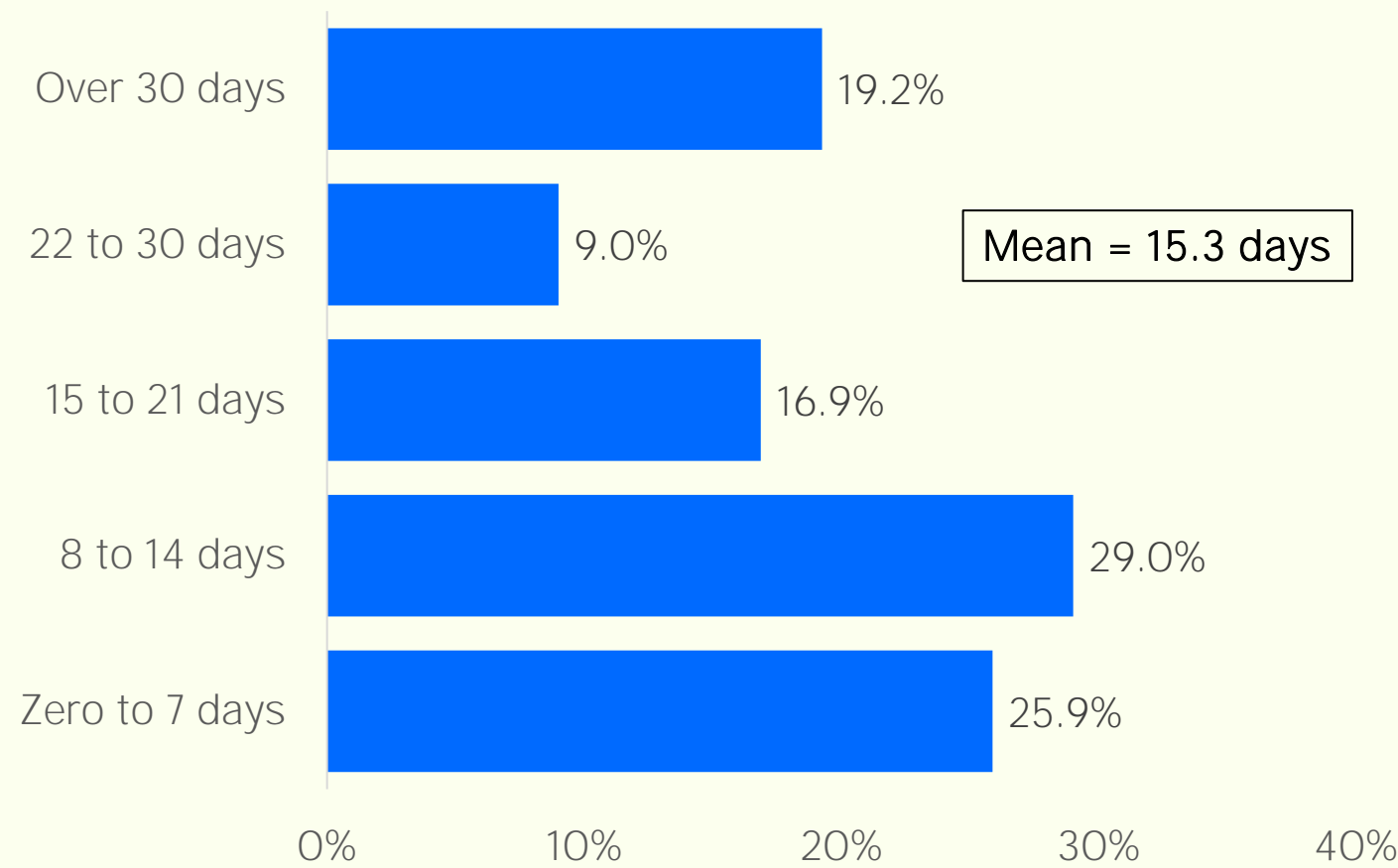
**Question:**  
Thinking carefully about THE NEXT TWELVE (12) MONTHS.

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?



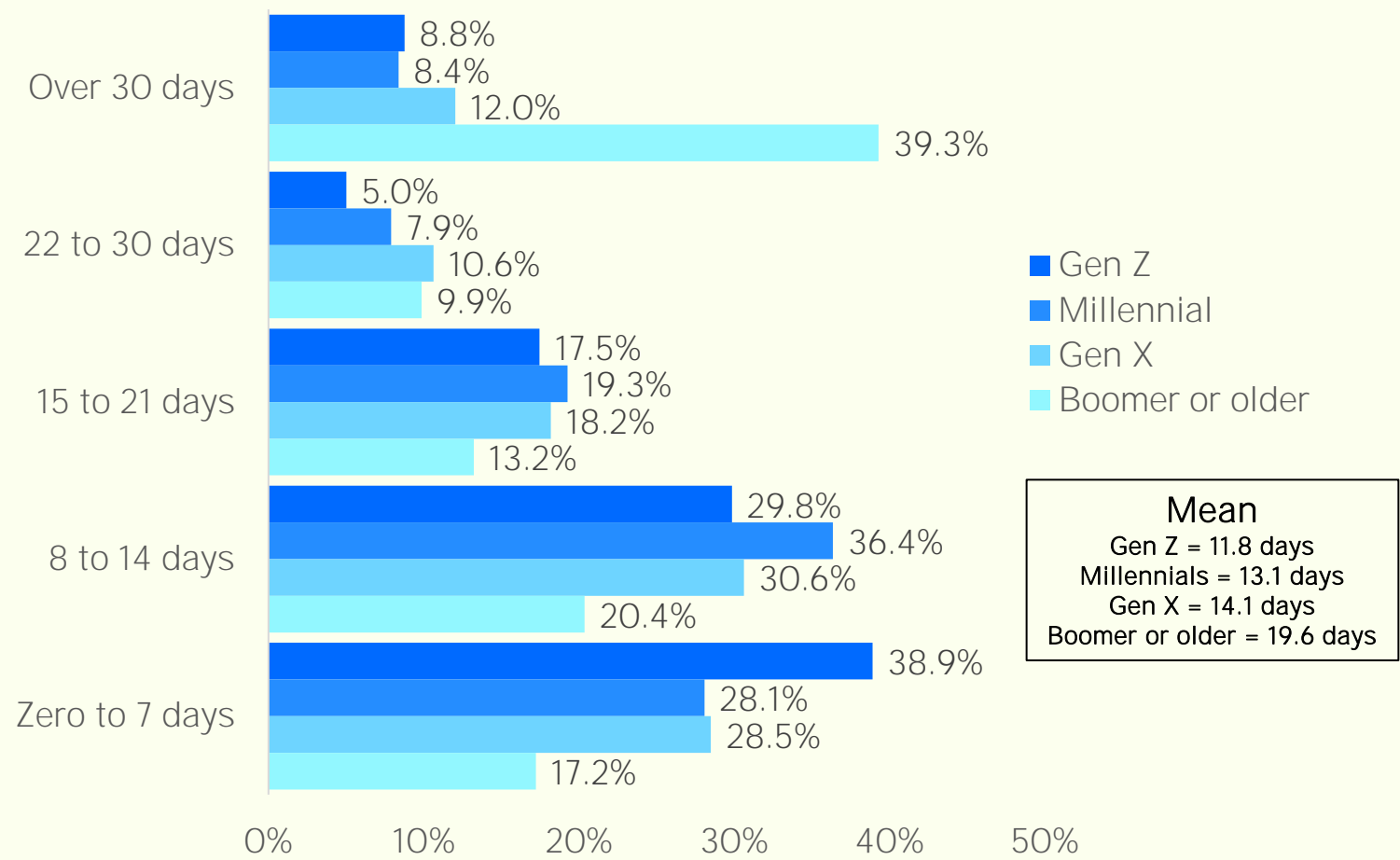
# The Average American Anticipate Having Just Over 2 Weeks Available for Leisure Travel in the Next 12 Months

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



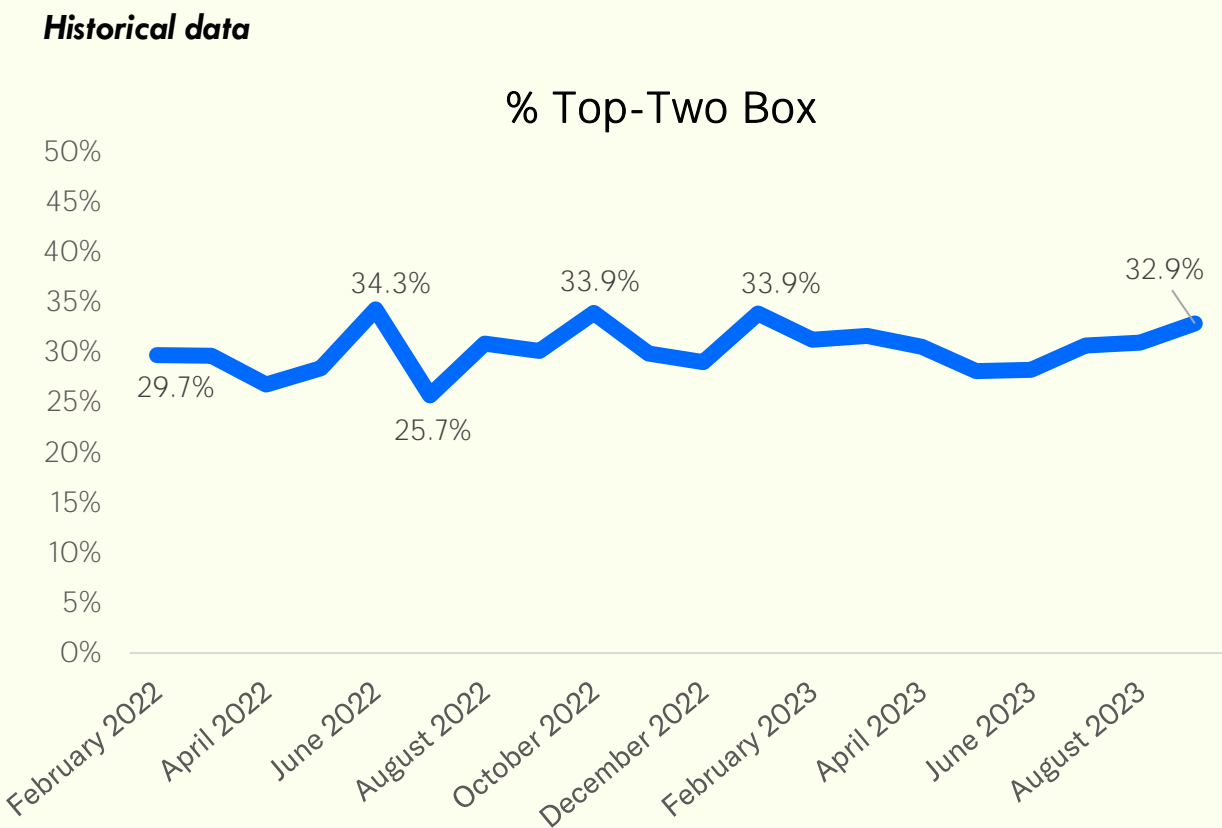
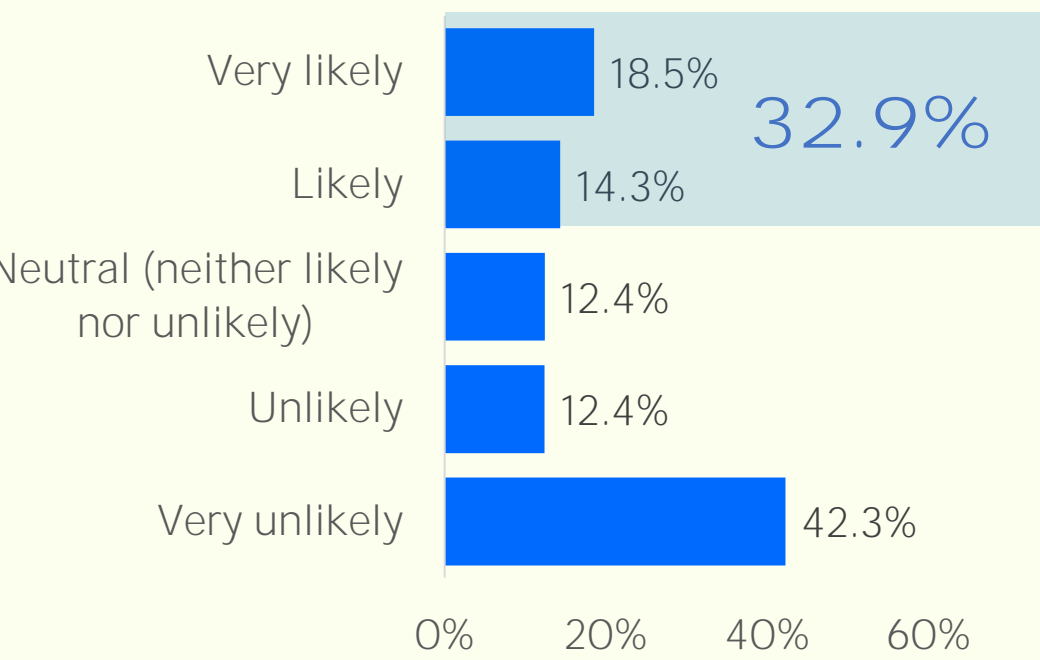
# Older Travelers Have More Days Available to Commit to Travel

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



# 1-in-3 Americans Plan to Travel Abroad in the Next Year.

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.

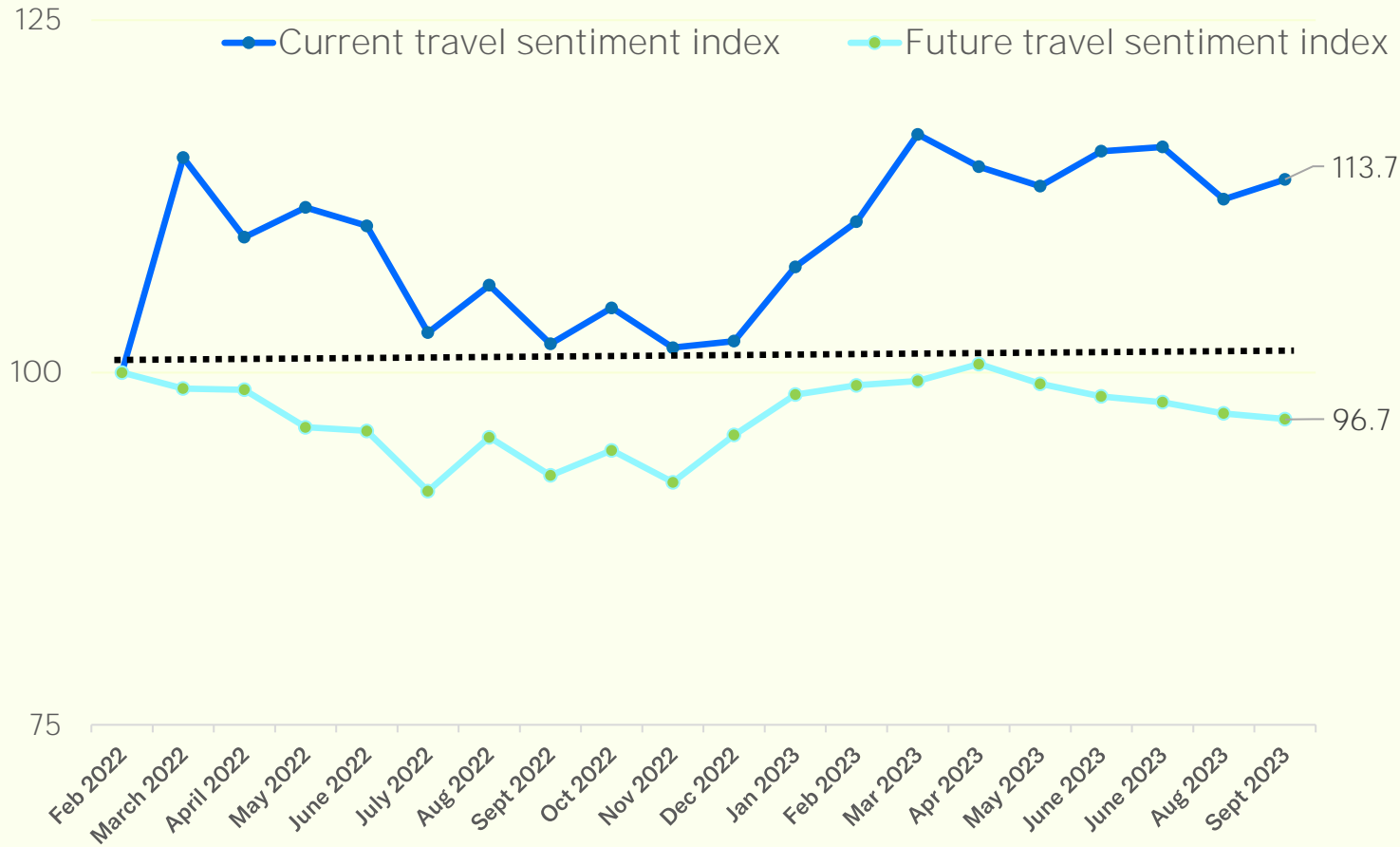
## Current Travel Sentiment Index

- 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)

# Travel Sentiment Indices



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



# Marketing Travel

Social Media



**Future Partners**

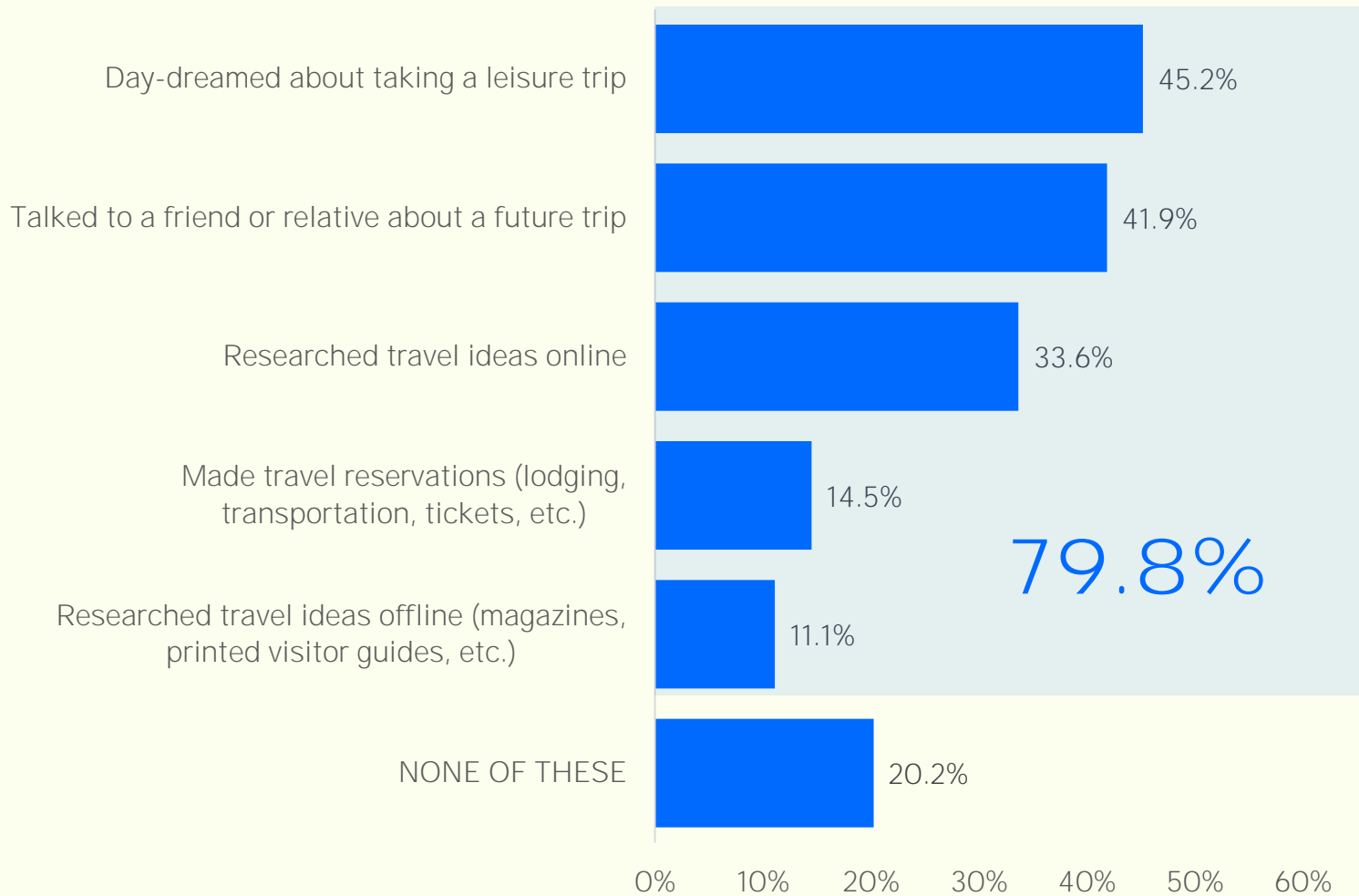




# Most American Travelers are Actively Travel Dreaming and/or Planning

Question:

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

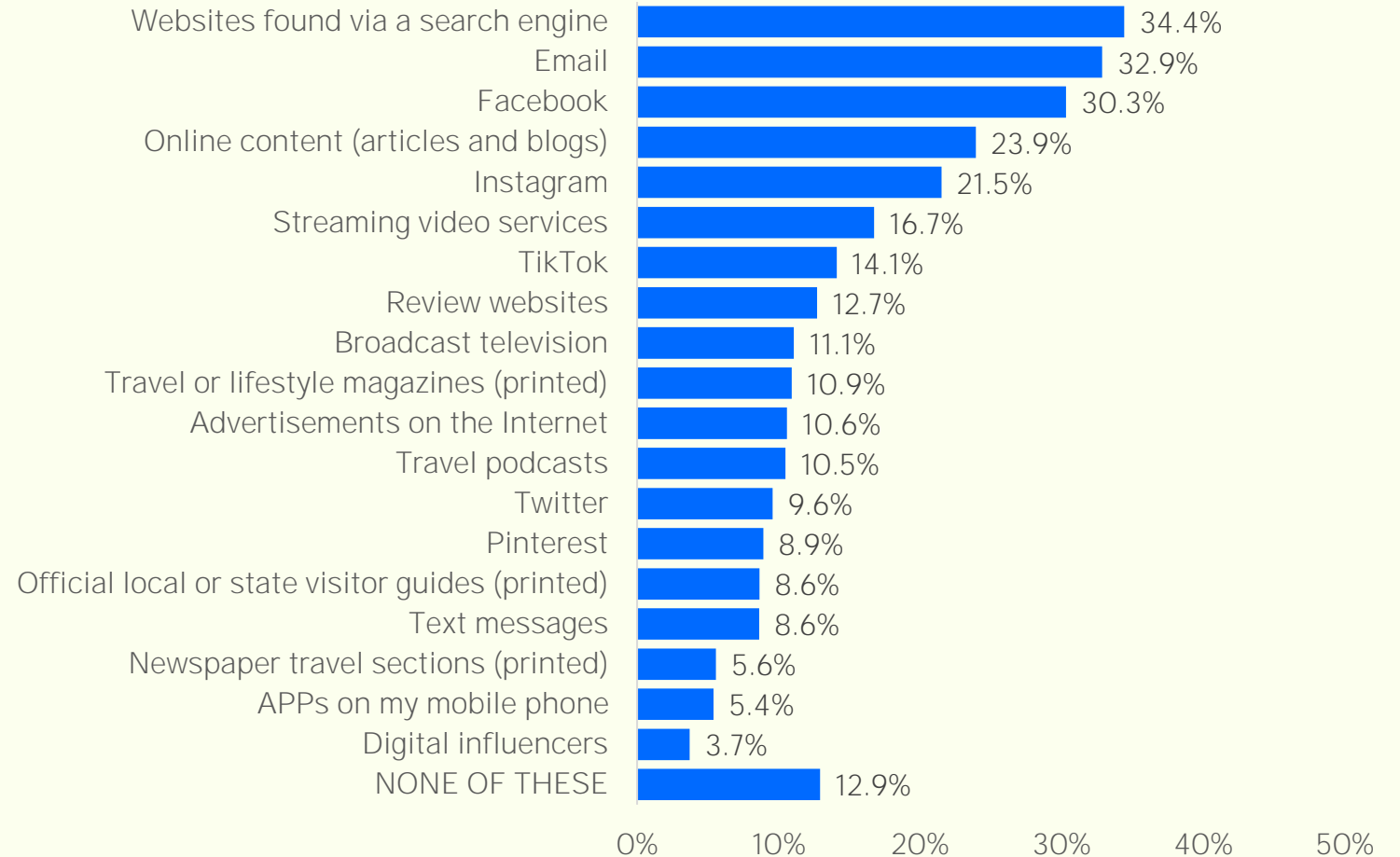


# Destination Inspiration Leans Heavily into the Internet & Email.

## Question:

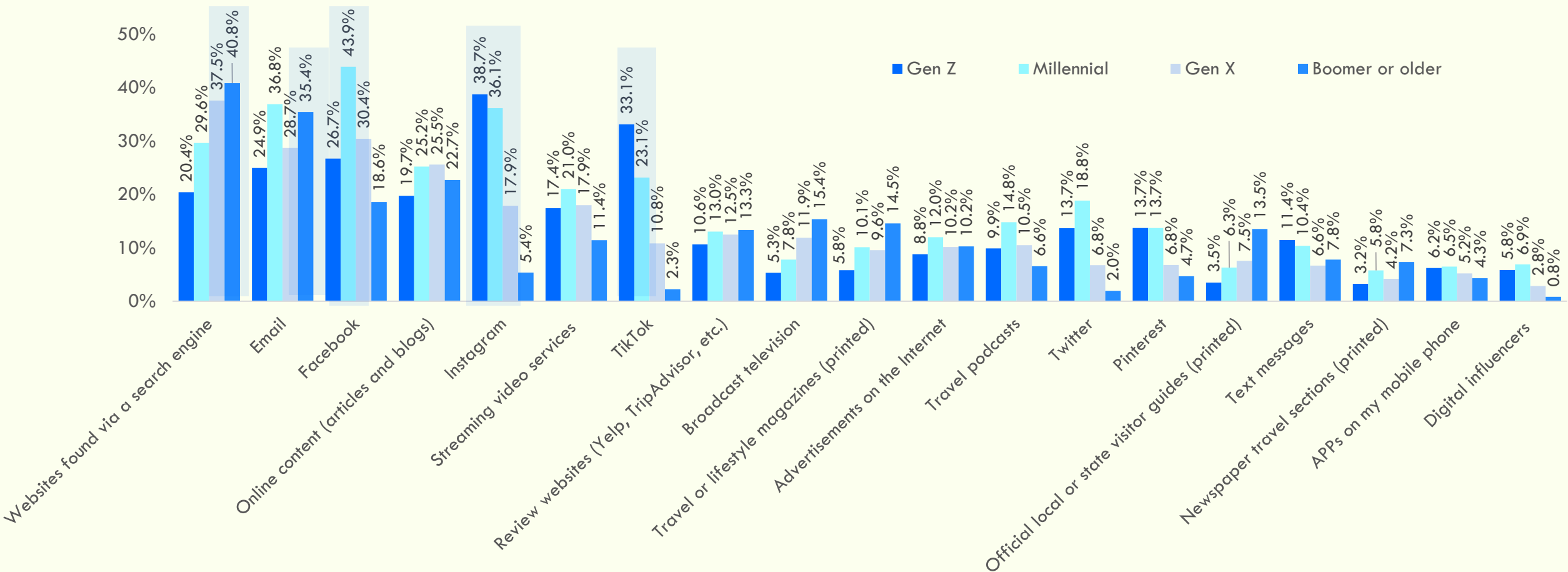
Please think about how travel destinations could best reach you with their messages right now.

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



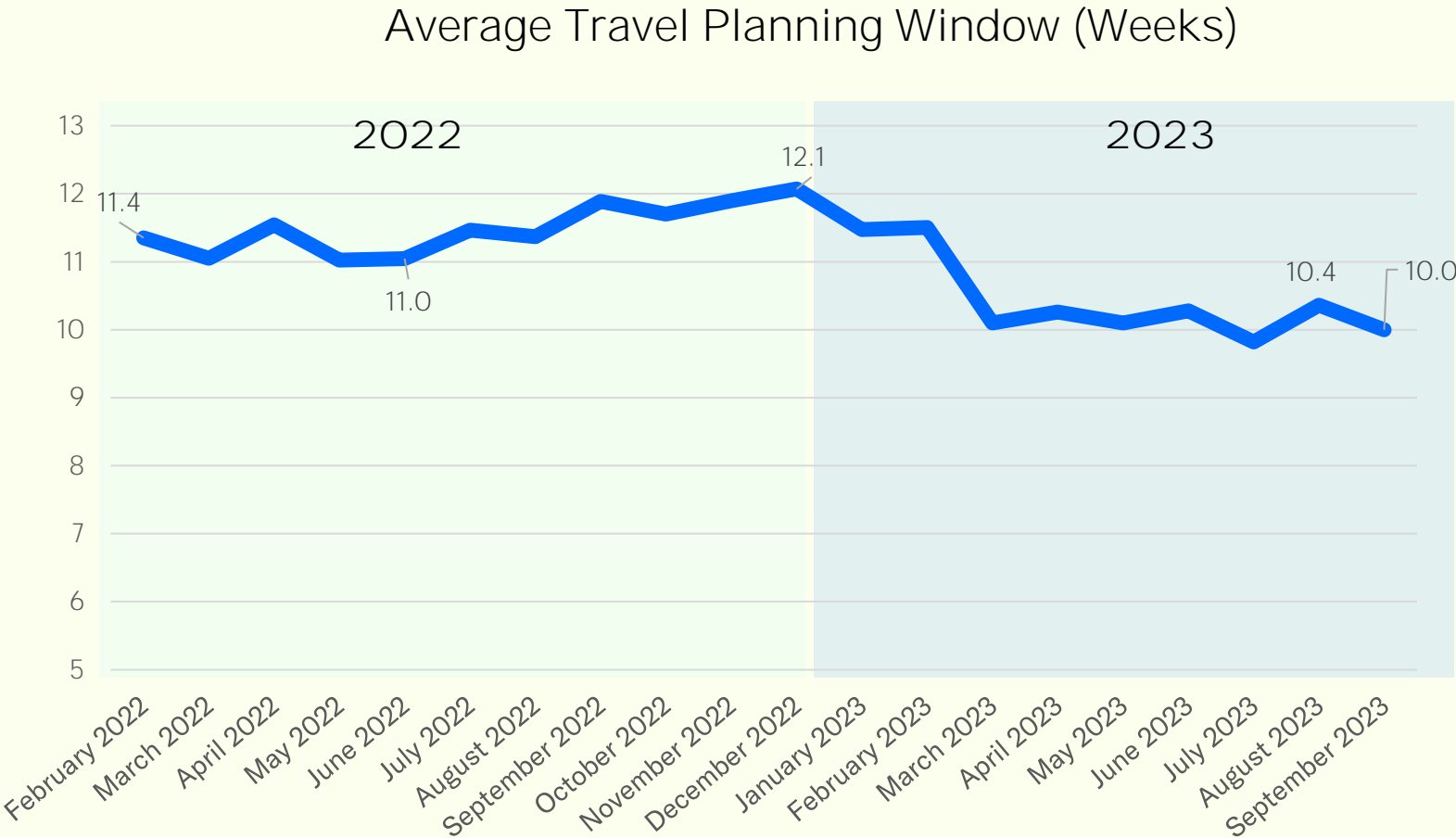
# But Age Drives Where One Seeks Travel Inspiration

**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)



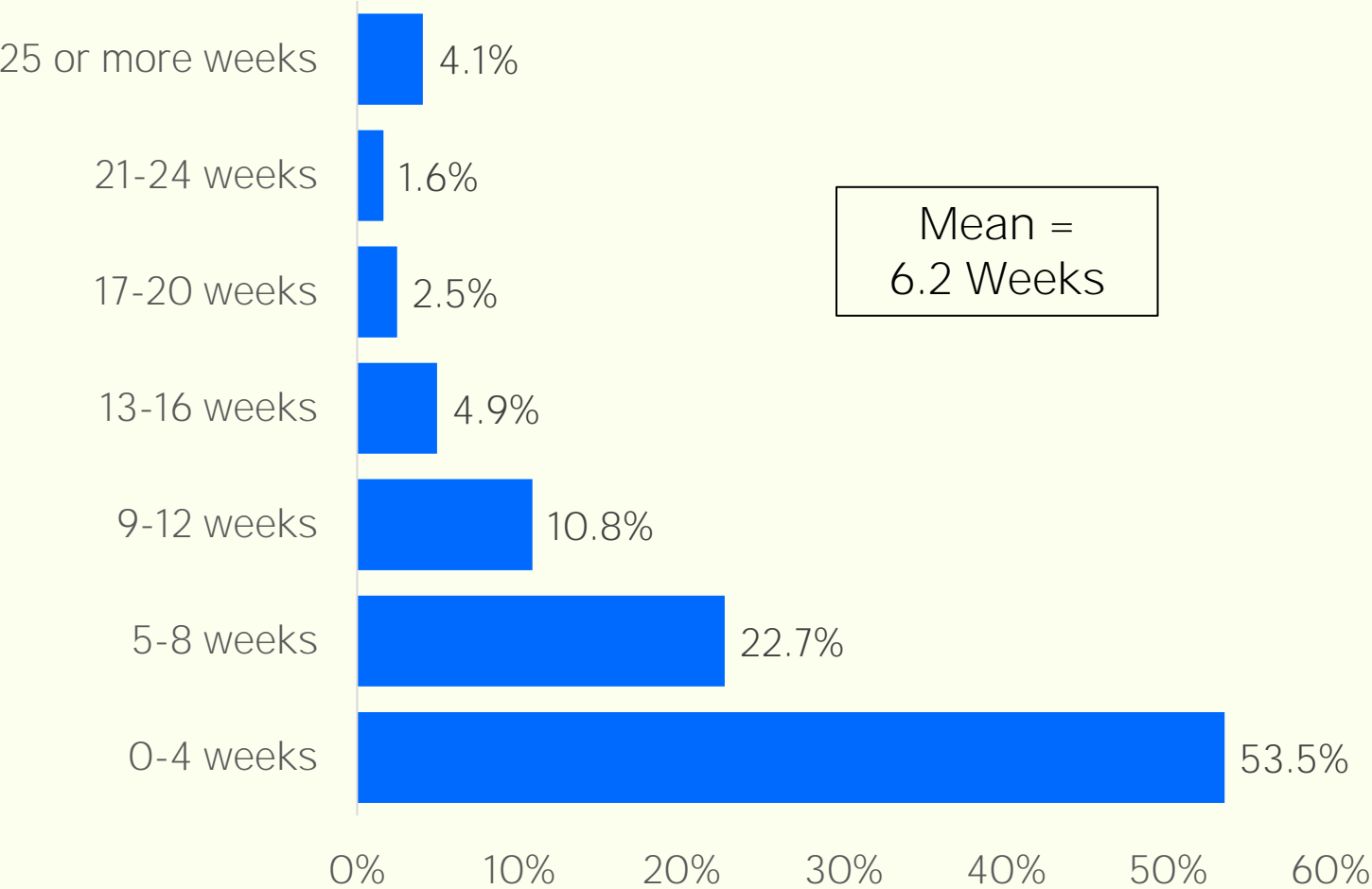
# Americans' Trip Planning Windows Have Shrunk in the Last Year

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



# Americans are taking just over 6 weeks to plan overnight trips

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



# Community Sentiment



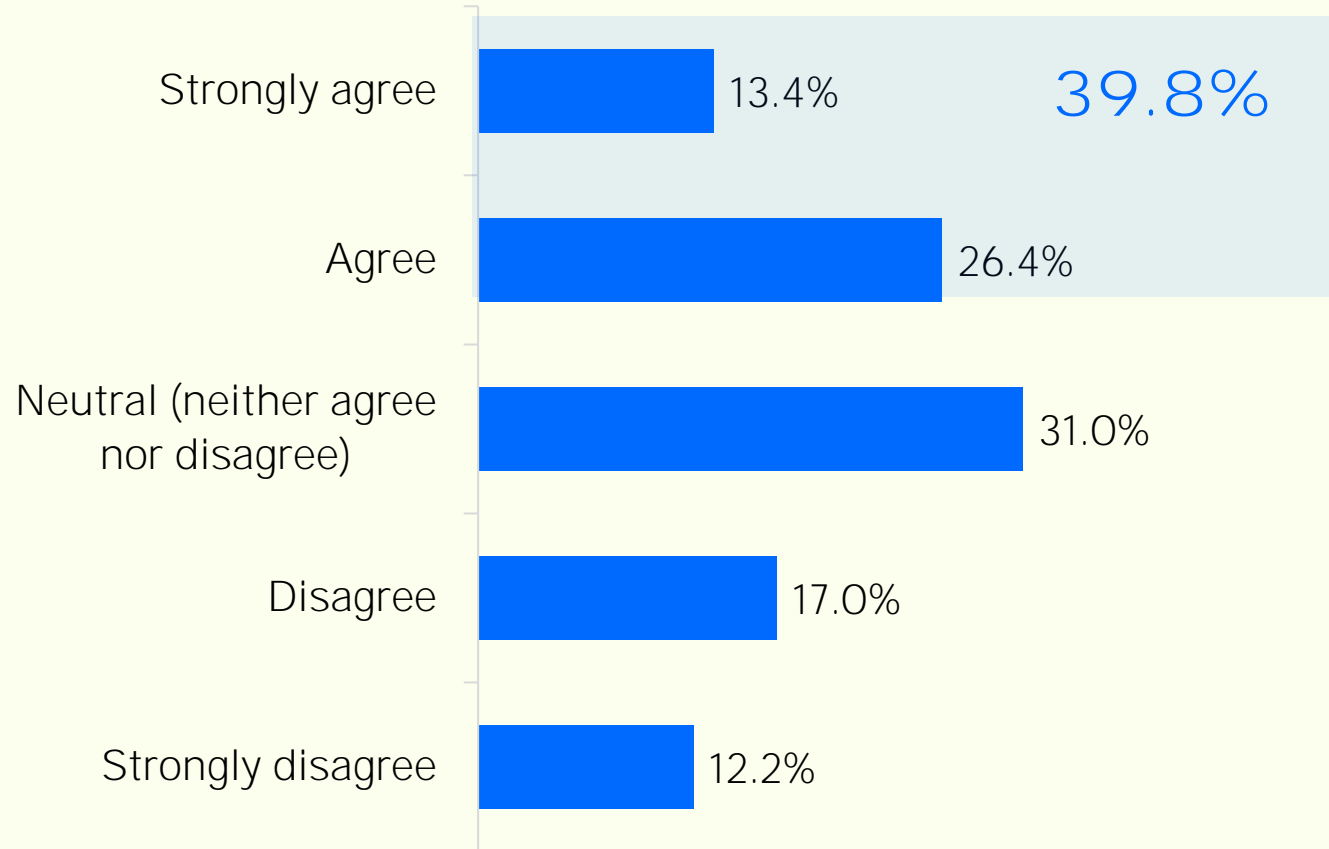
**Future Partners**



# Travel is often the inspiration for the decision to become a resident of a place

## Question:

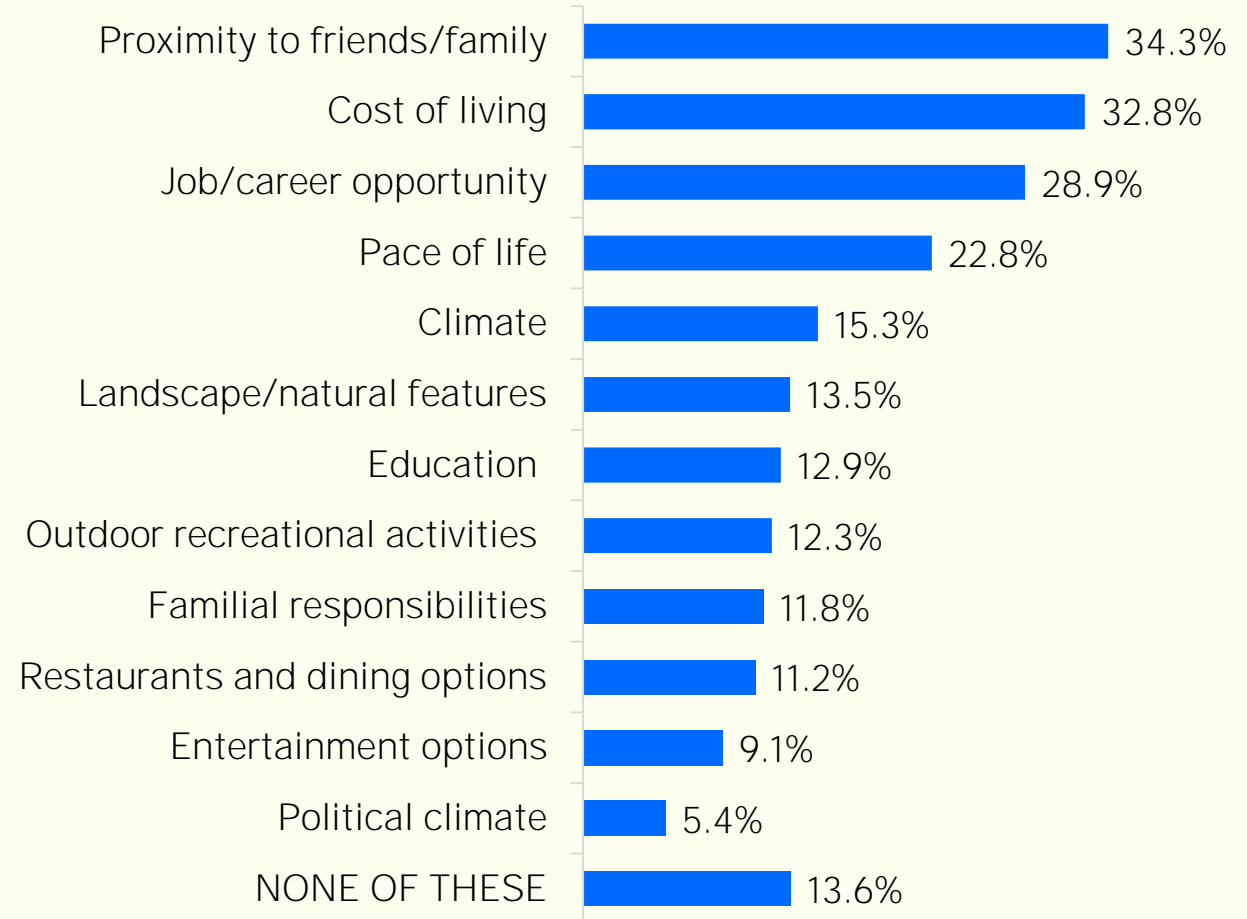
Please rate how much you agree or disagree with the following statement: I moved to my local community primarily because I visited and love the place.



# Proximity to Family, the Costs of Living and Jobs are Why We Move.

## Question:

Which of the following reasons best describe why you originally moved to your local community?





# Half are at Least Moderately Satisfied with their Hometown's Direction

Question:  
All things considered, how satisfied are you with the direction your local community is headed?

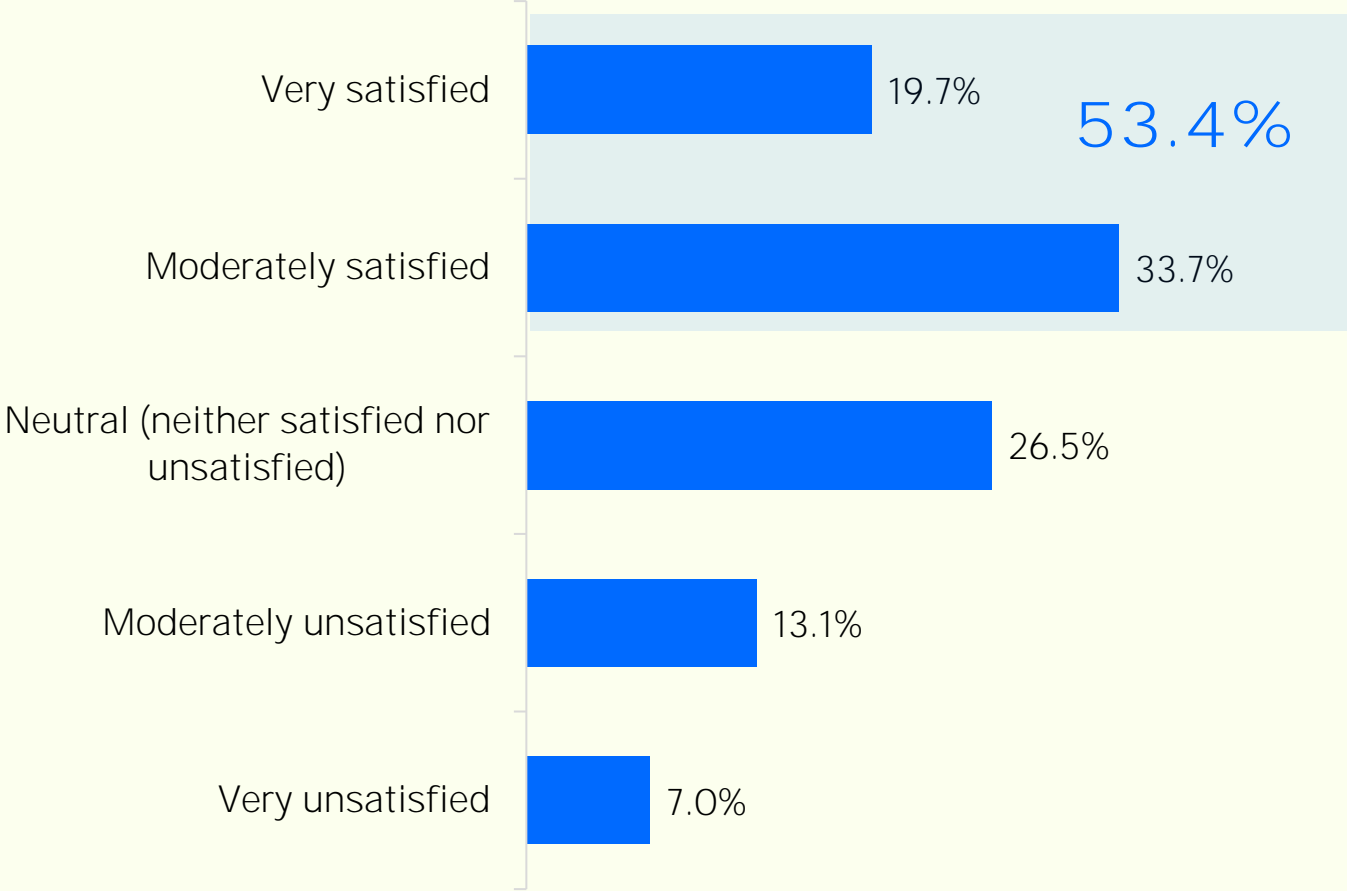
## Top-2 Box Score: By Generation

GenZ: 39.2%  
**Millennials: 61.1%**

GenX: 49.0%  
Baby Boomers+: 54.1%

## Top-2 Box Score: By Region

West: 53.3%  
Midwest: 51.0%  
Northeast: 53.9%  
**South: 54.4%**



# Not Quite Half Feel Tourism Makes Their Community a Better Place to Live

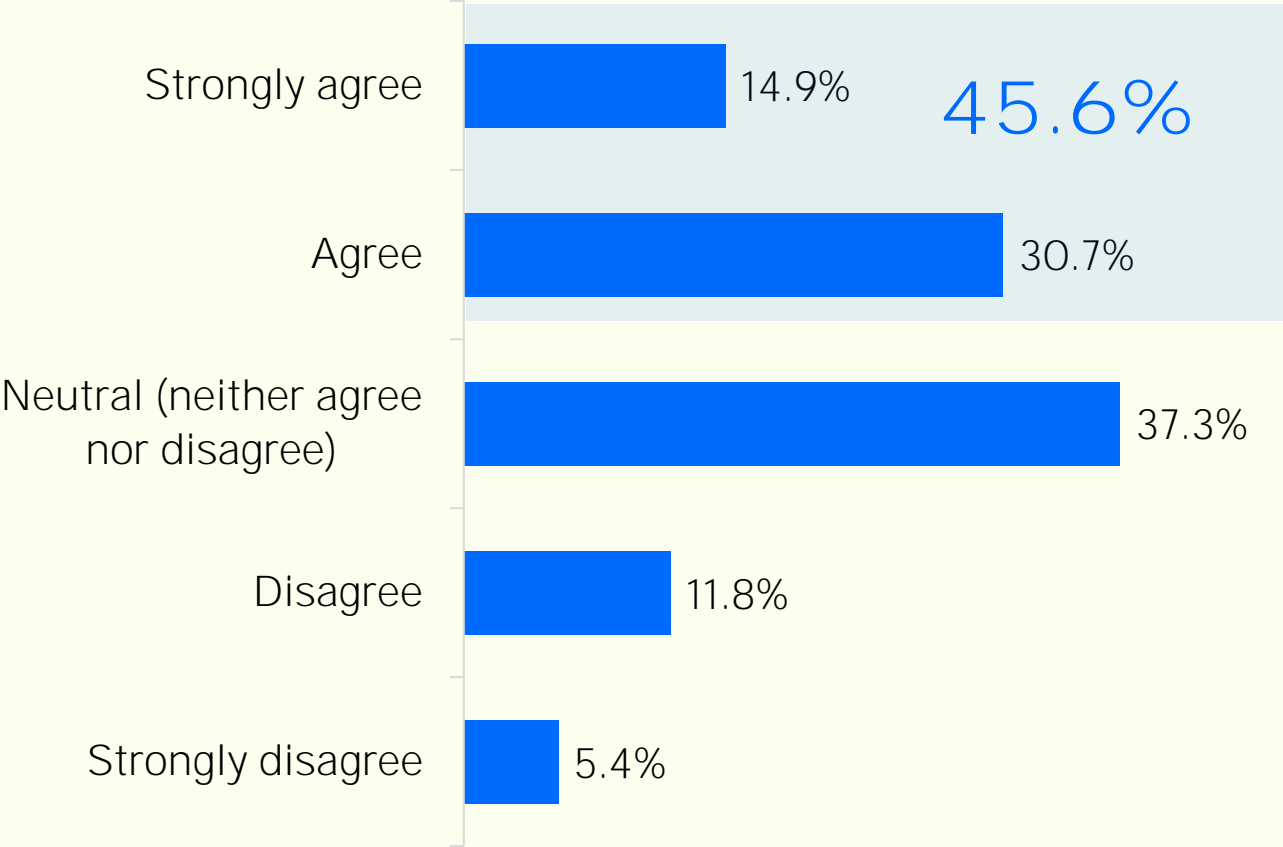
Statement:  
I believe tourism in my community makes it a better place in which to live.

## Top-2 Box Score: By Generation

GenZ: 39.0%  
**Millennials: 57.0%**  
GenX: 40.8%  
Baby Boomers+: 40.2%

## Top-2 Box Score: By Region

**West: 51.9%**  
Midwest: 38.5%  
Northeast: 40.5%  
South: 47.2%



# Over Half Say Tourism is Important to their **Community's Economic Vitality**

## Question:

In your opinion, how important is the tourism industry to the economic vitality of the community in which you live?

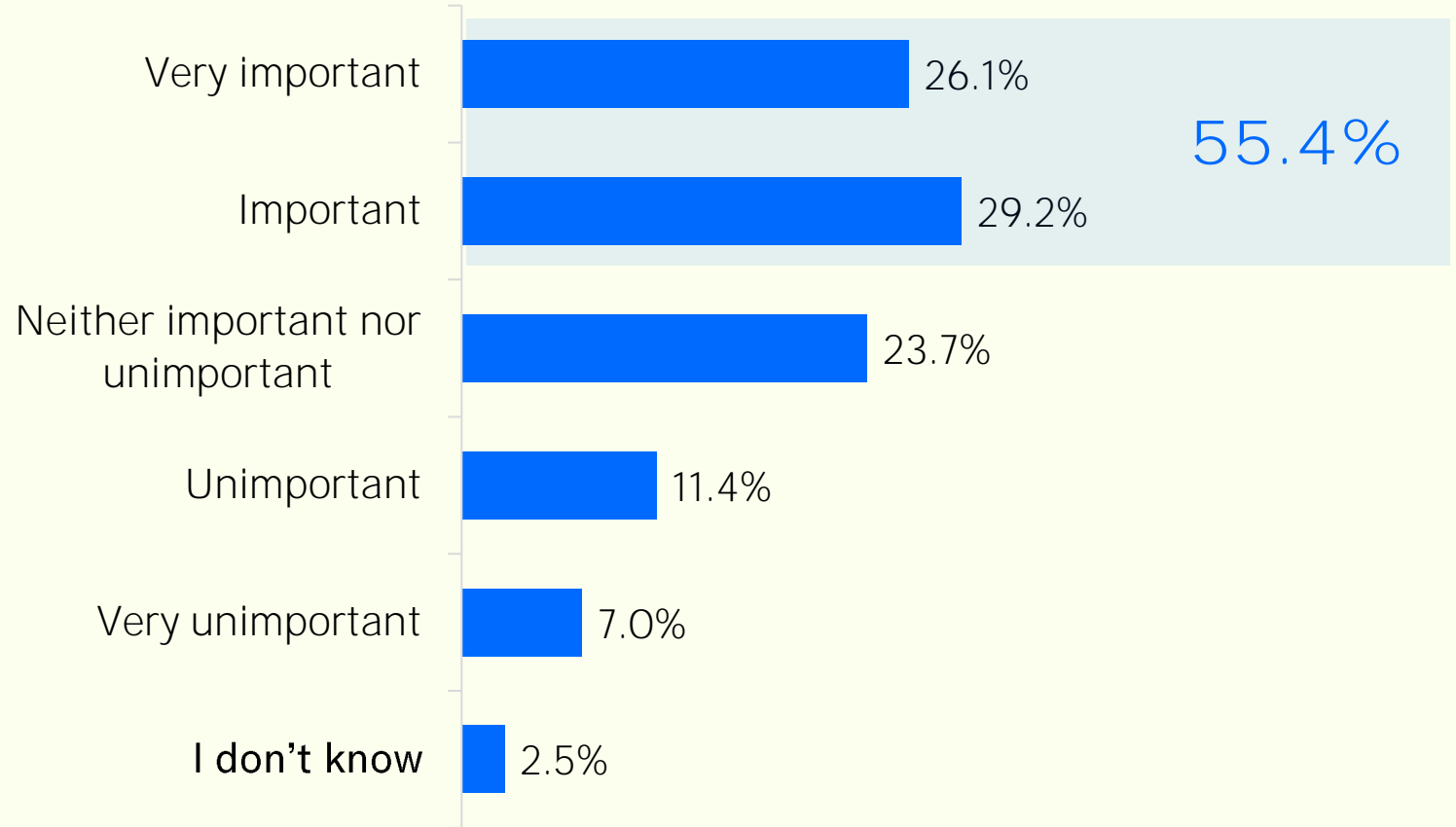
### Top-2 Box Score: By Generation

GenZ: 41.9%  
**Millennials: 62.3%**

GenX: 53.2%  
Baby Boomers+: 54.8%

### Top-2 Box Score: By Region

**West: 64.7%**  
Midwest: 45.5%  
Northeast: 46.0%  
South: 58.5%



# The Majority of **American Travelers Don't See** Themselves as Living in Popular Tourism Areas

## Statement:

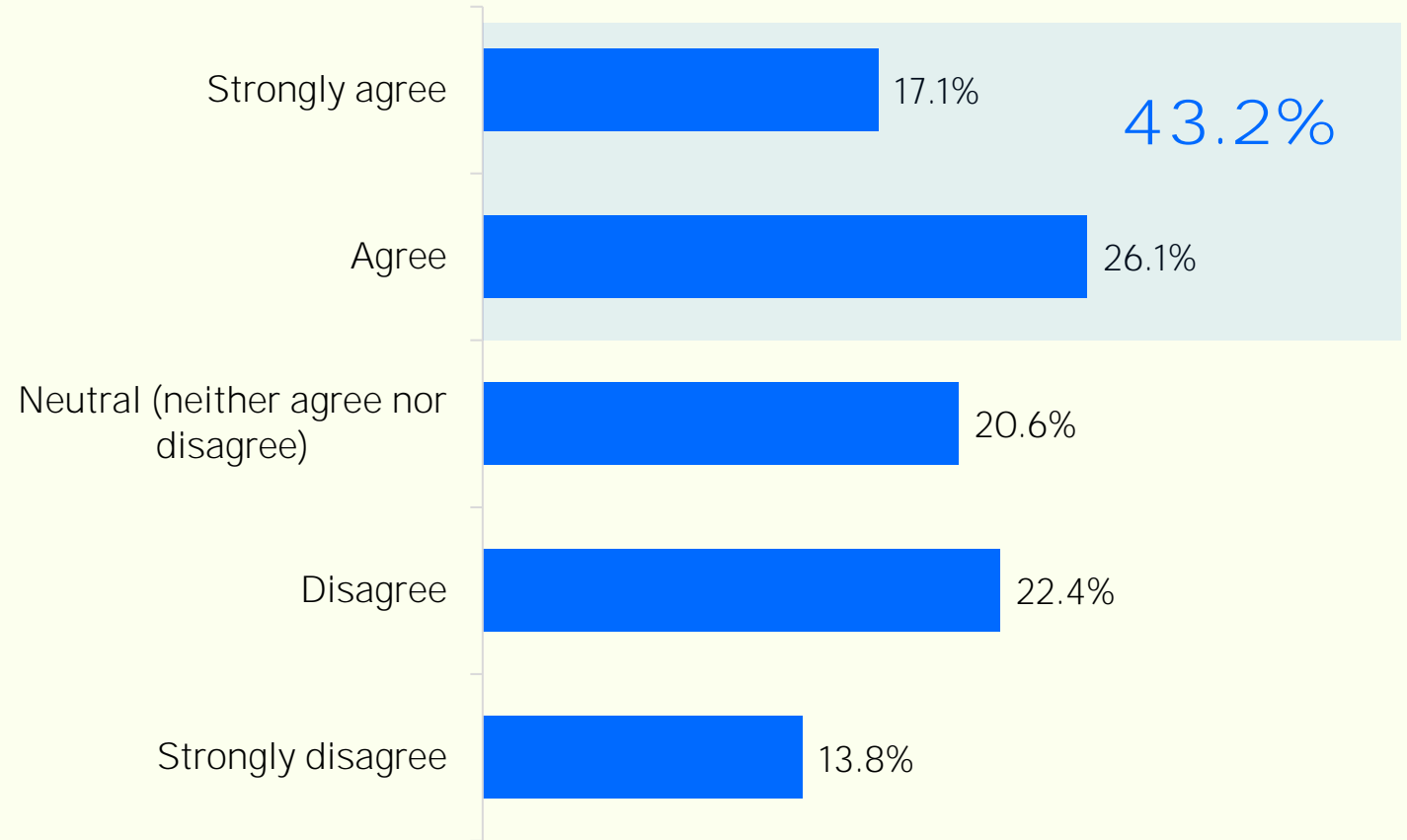
I live in a community that is a popular tourism destination.

### Top-2 Box Score: By Generation

GenZ: 41.9%  
**Millennials: 52.4%**  
GenX: 37.8%  
Baby Boomers+: 39.0%

### Top-2 Box Score: By Region

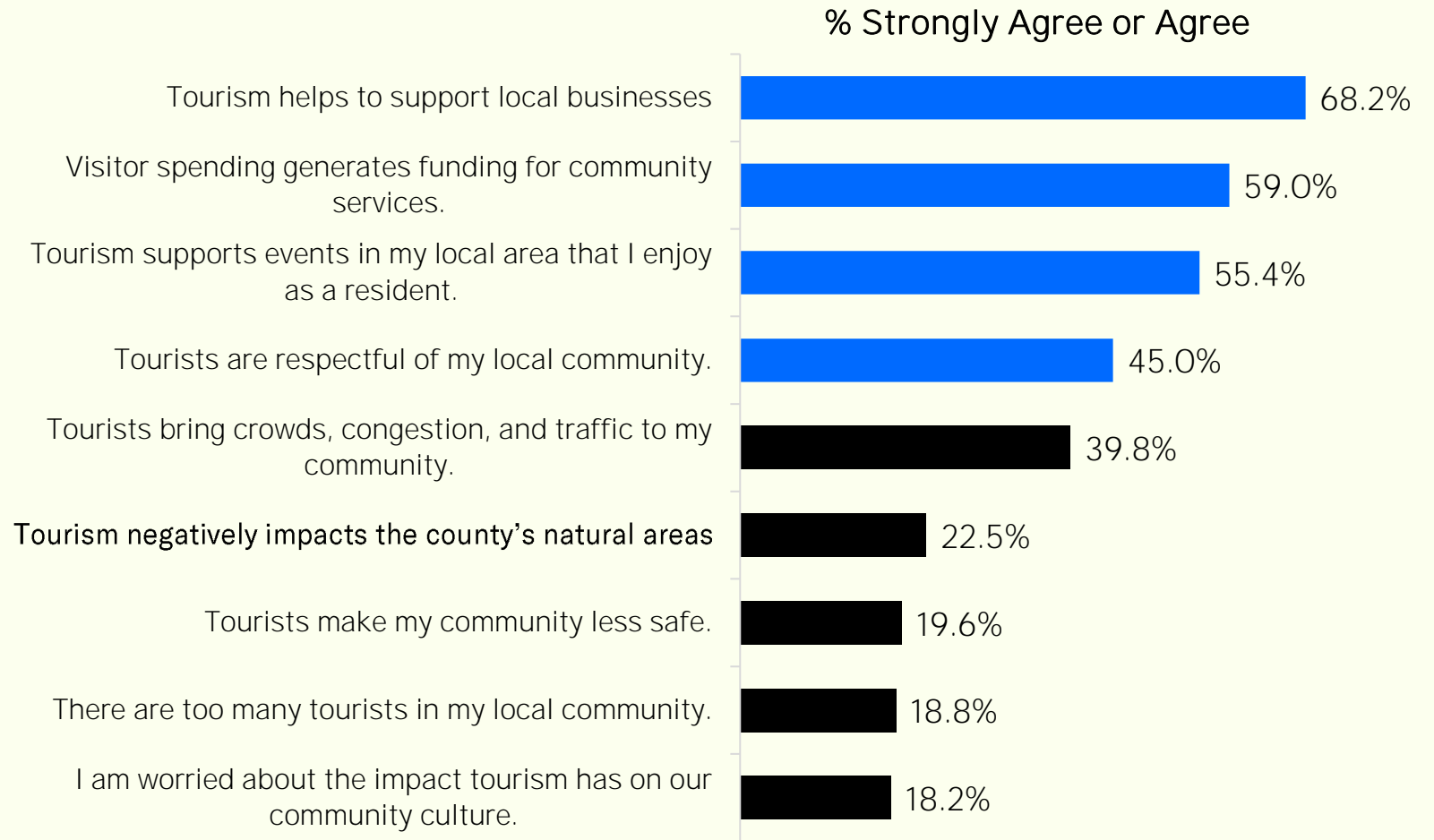
**West: 53.6%**  
Midwest: 26.4%  
Northeast: 37.7%  
South: 47.3%



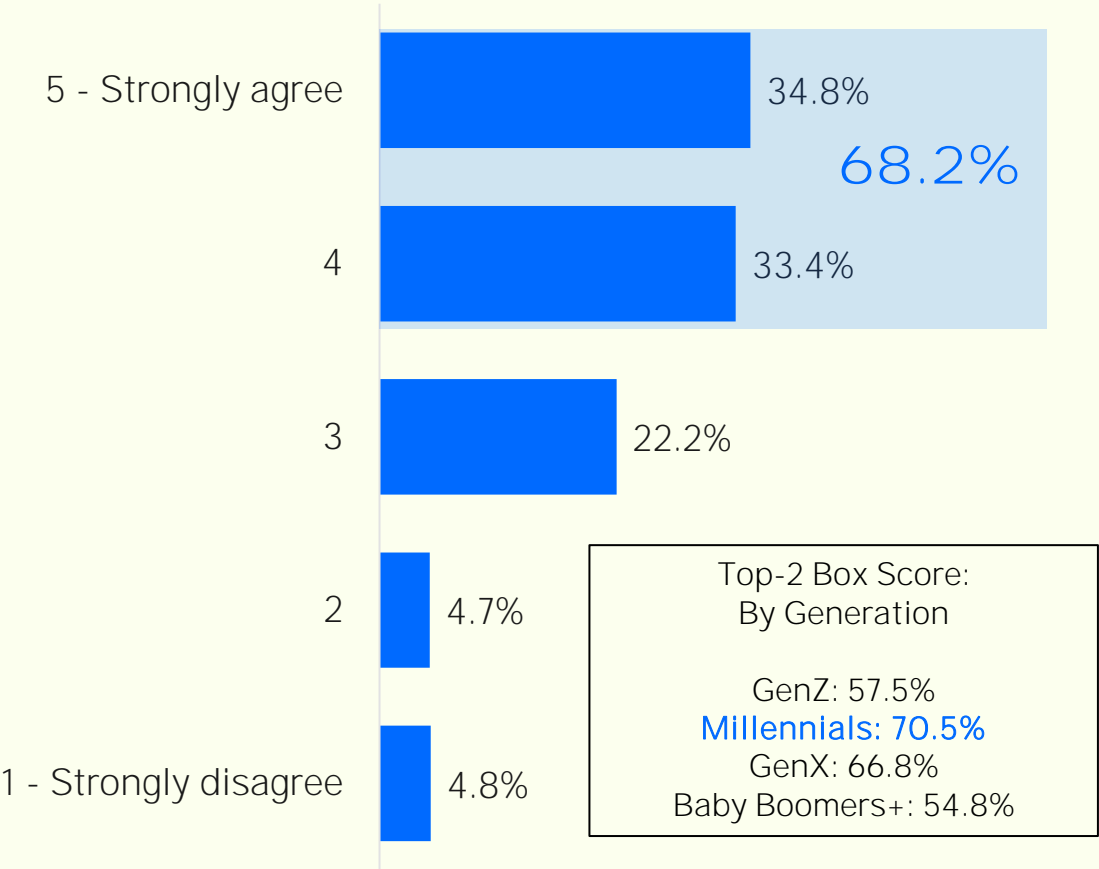
# Positive Feelings About Tourism are More Common Than Negative.

## Question:

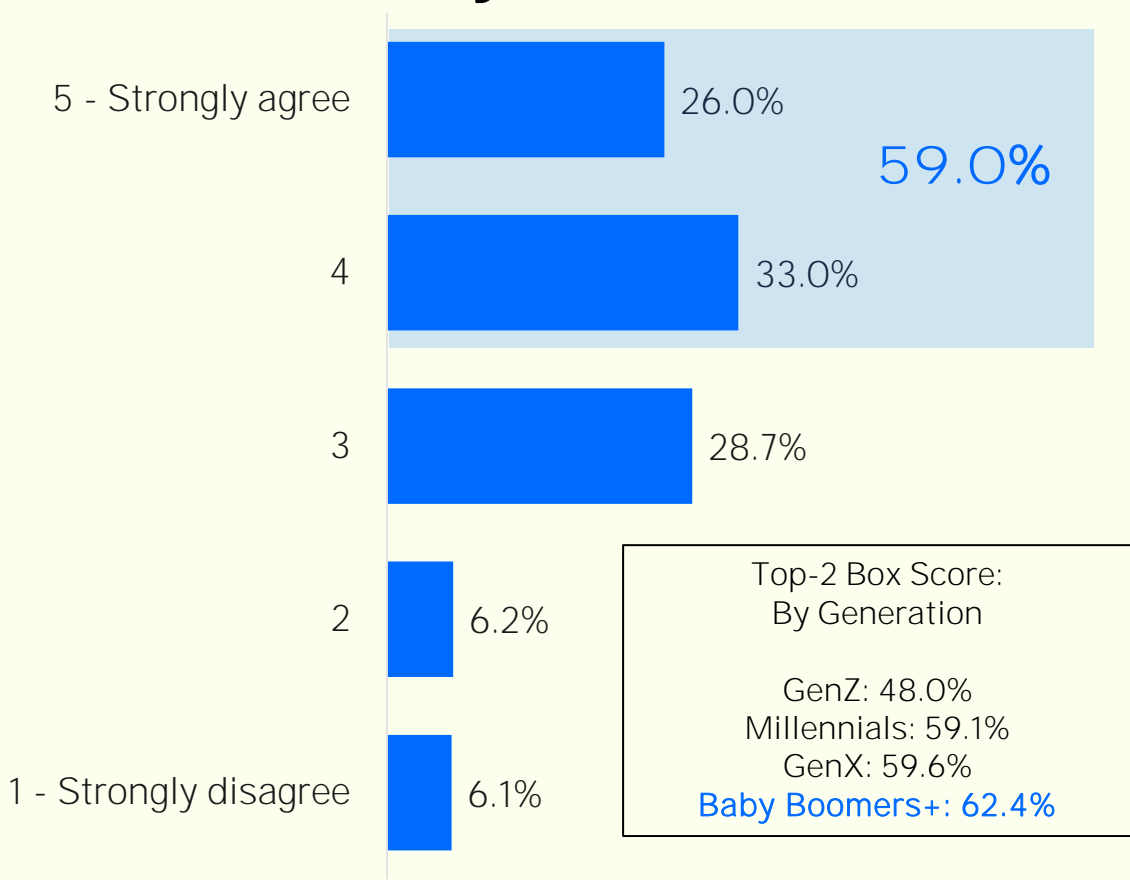
Thinking about your community's tourism industry and its impact on your community, please rate how much you agree with the following statements.



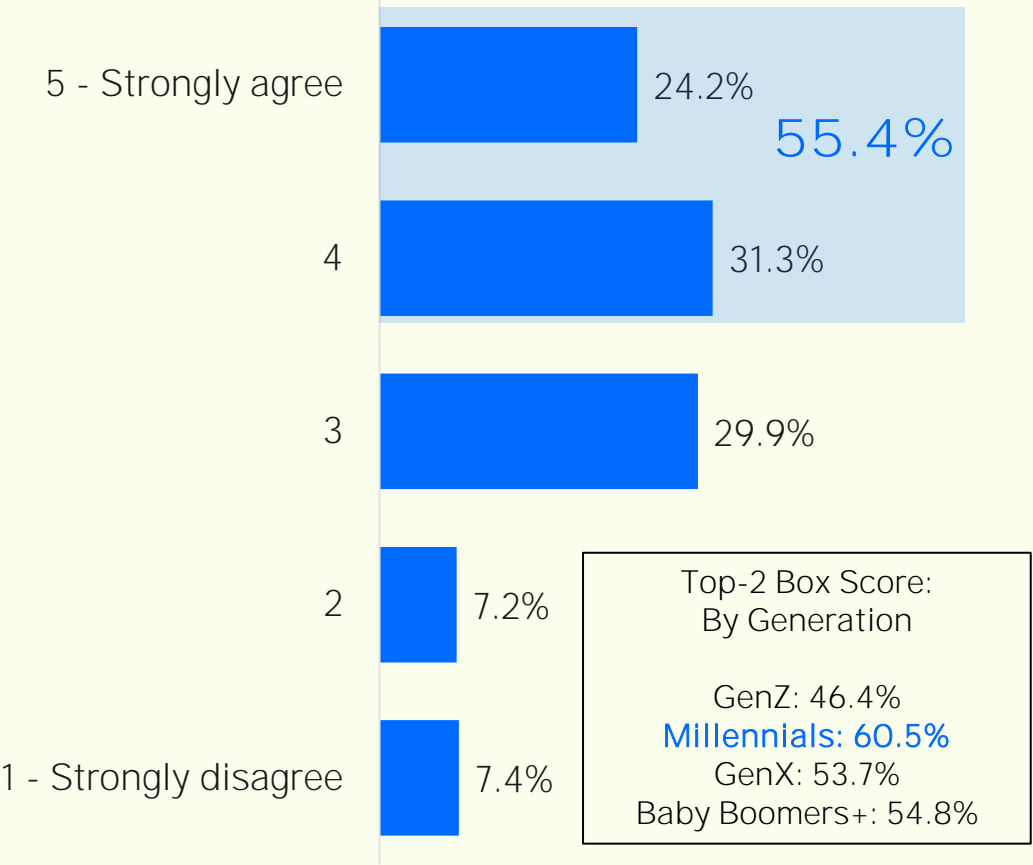
# “Tourism Helps to Support Local Businesses”



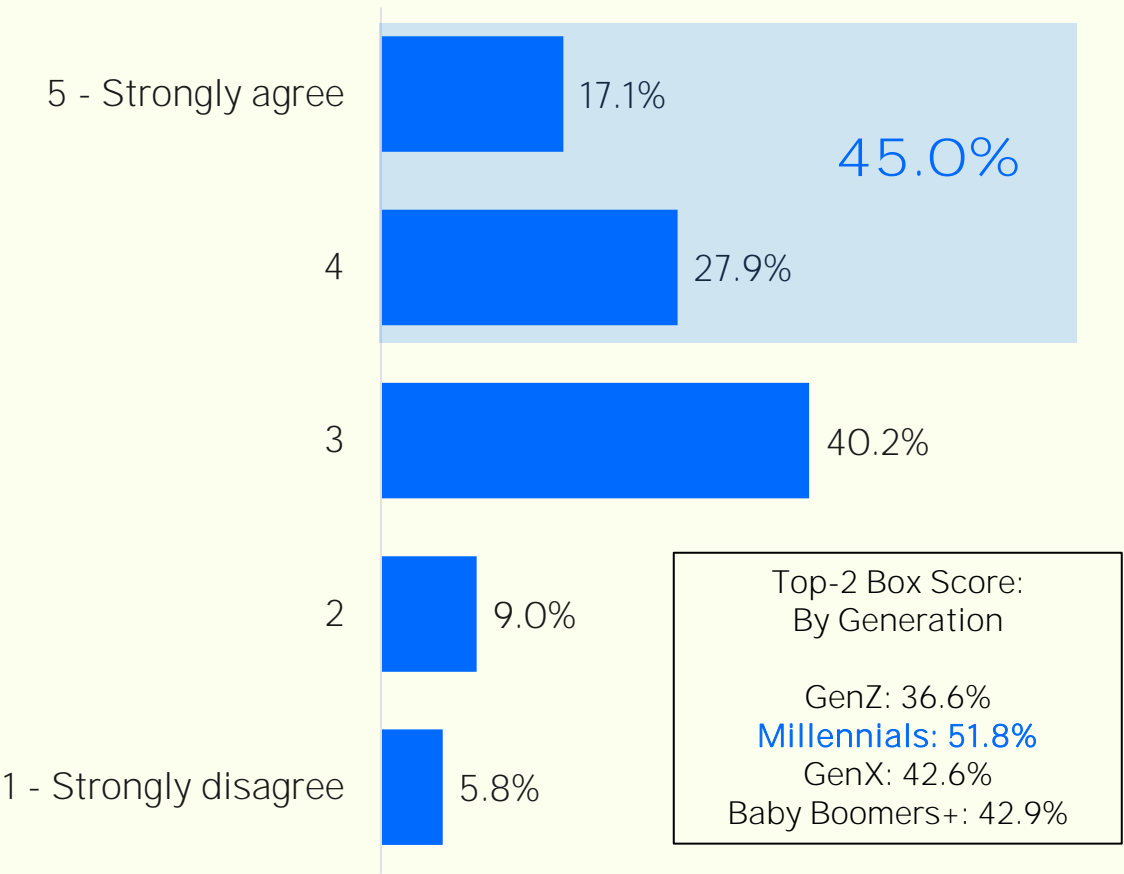
# “Visitor Spending Generates Funding for Community Services”



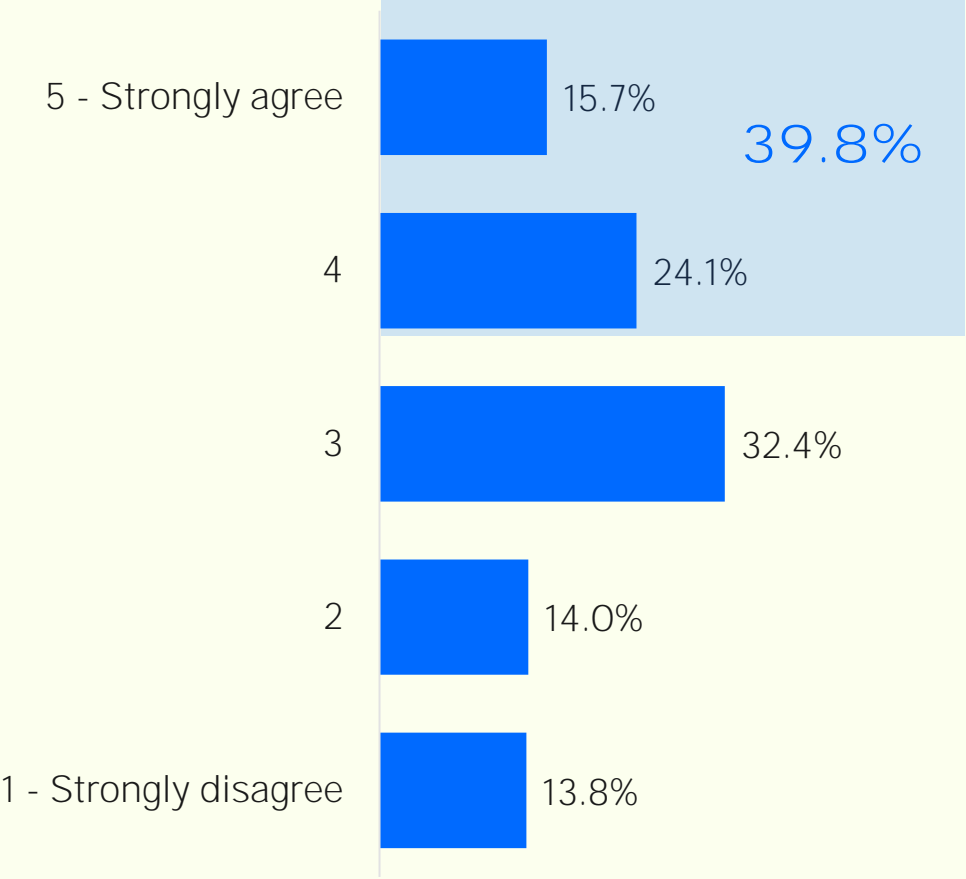
“Tourism supports events in my local area that I enjoy as a resident”



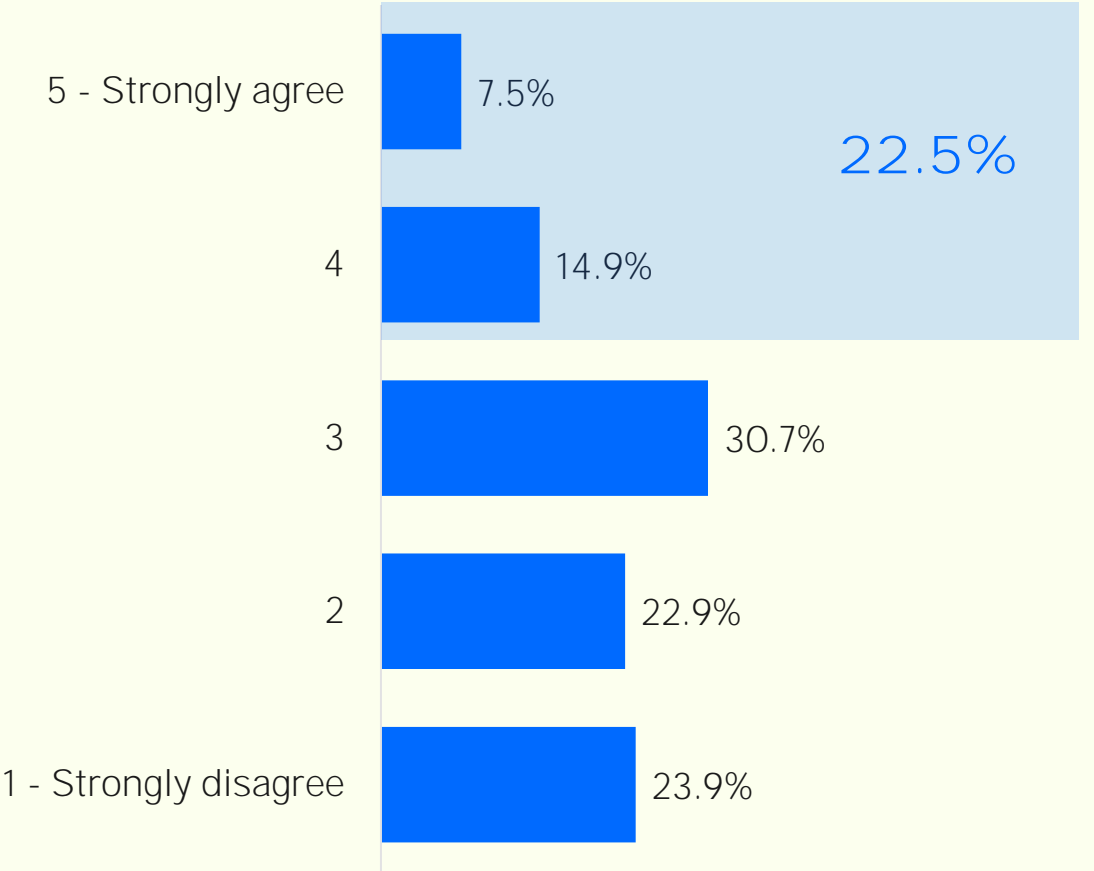
“Tourists are respectful of my local community”



**“Tourists bring crowds, congestion, and traffic to my community”**

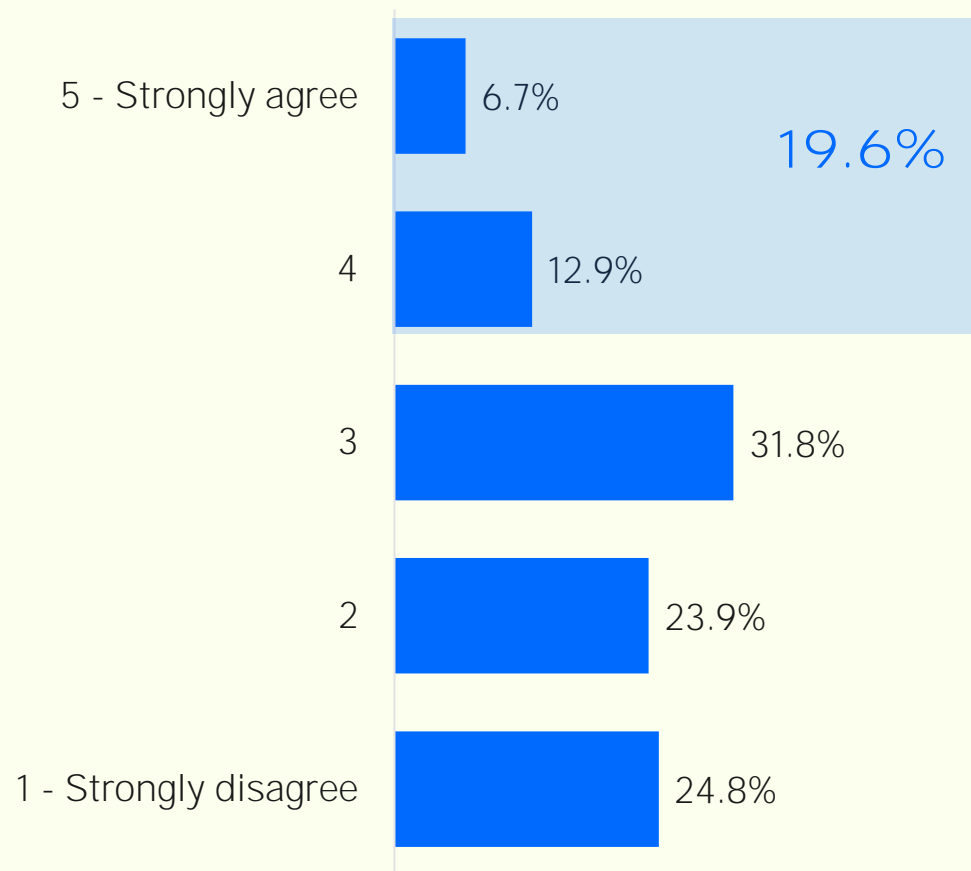


**“Tourism negatively impacts my area’s natural resources”**

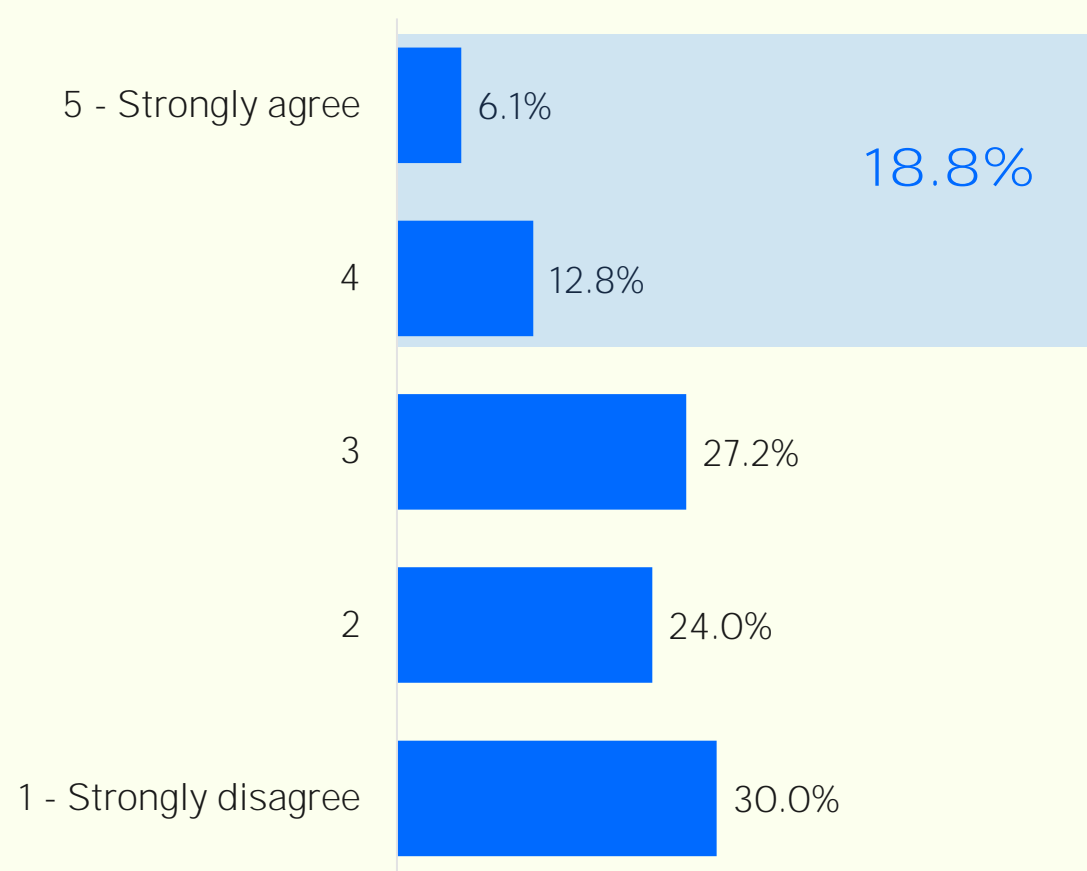




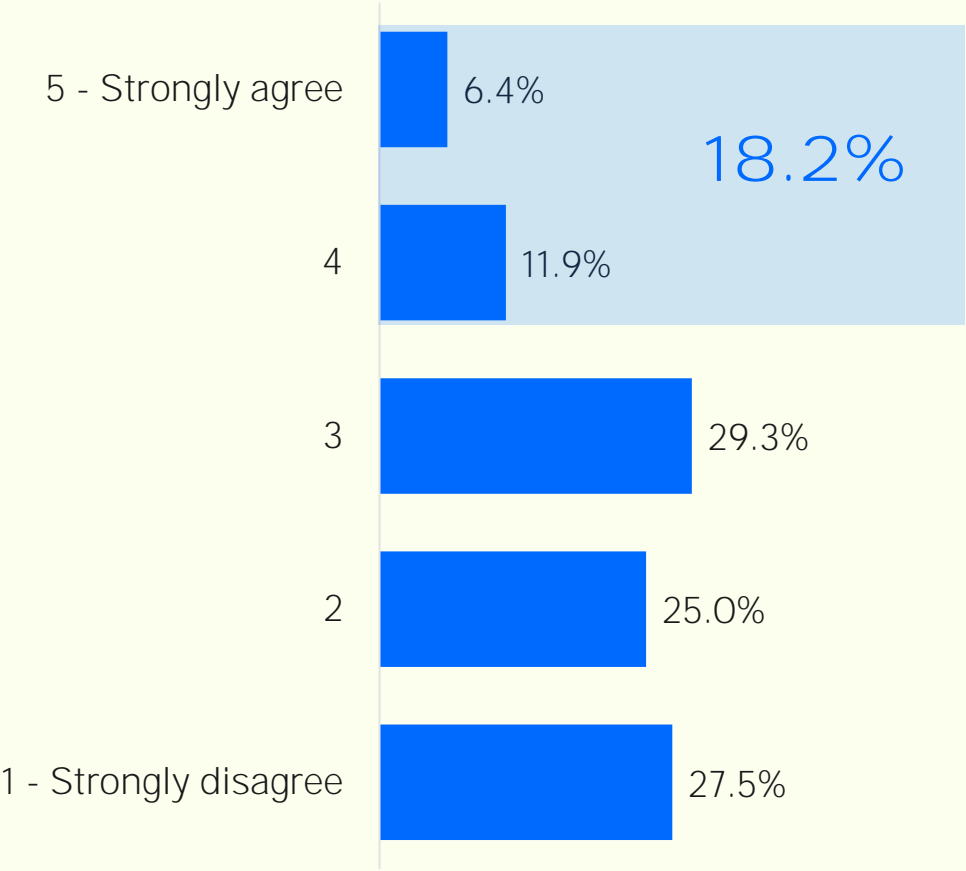
Tourists make my community less safe.



There are too many tourists in my local community.



I am worried about the impact tourism has on our community culture.



Top-2 Box Score:  
By Generation

GenZ: 24.3%

Millennials: 24.4%

GenX: 16.6%

Baby Boomers+: 11.1%

# 1-in-5 Feel Their Home Community has a Problem with Over-Tourism

## Statement:

I live in a place that has an issue with OVER-TOURISM (i.e., a place that has too many tourists.)

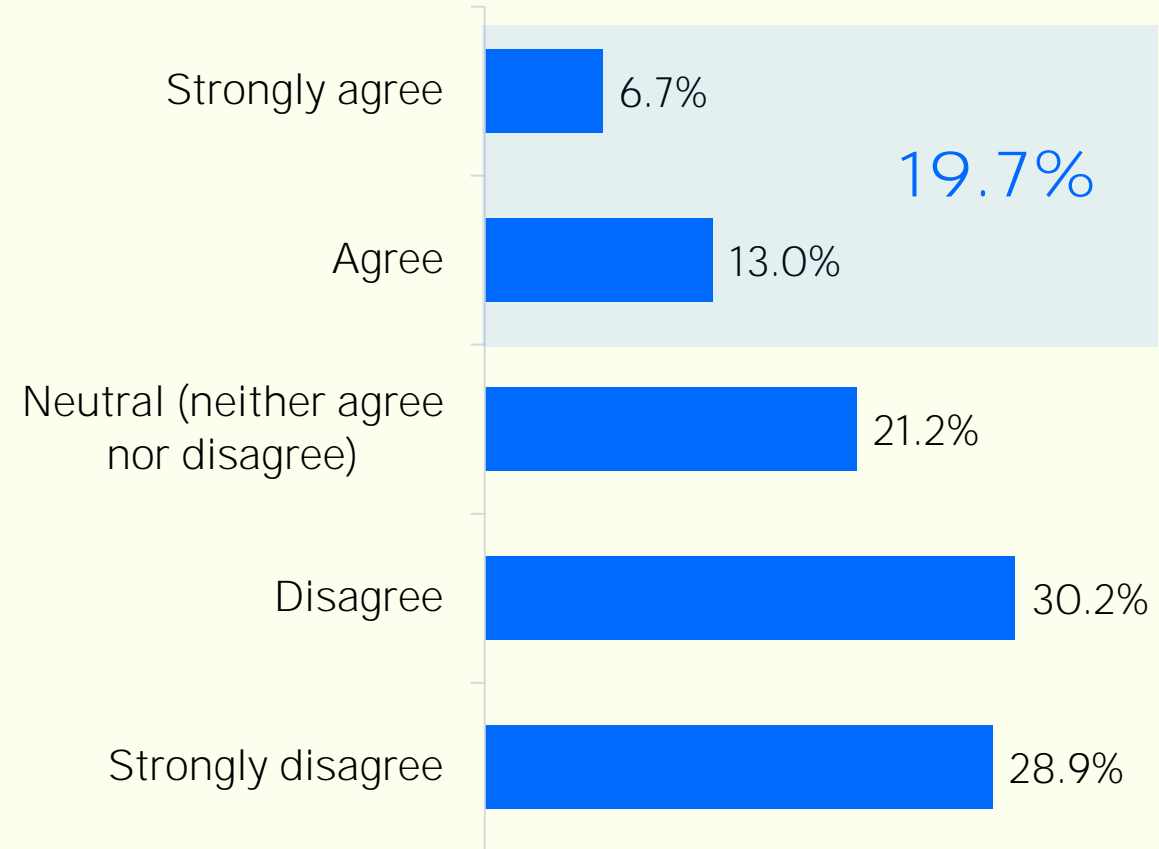
### Top-2 Box Score: By Generation

**GenZ: 27.7%**

Millennials: 25.4%

GenX: 18.8%

Baby Boomers+: 12.7%

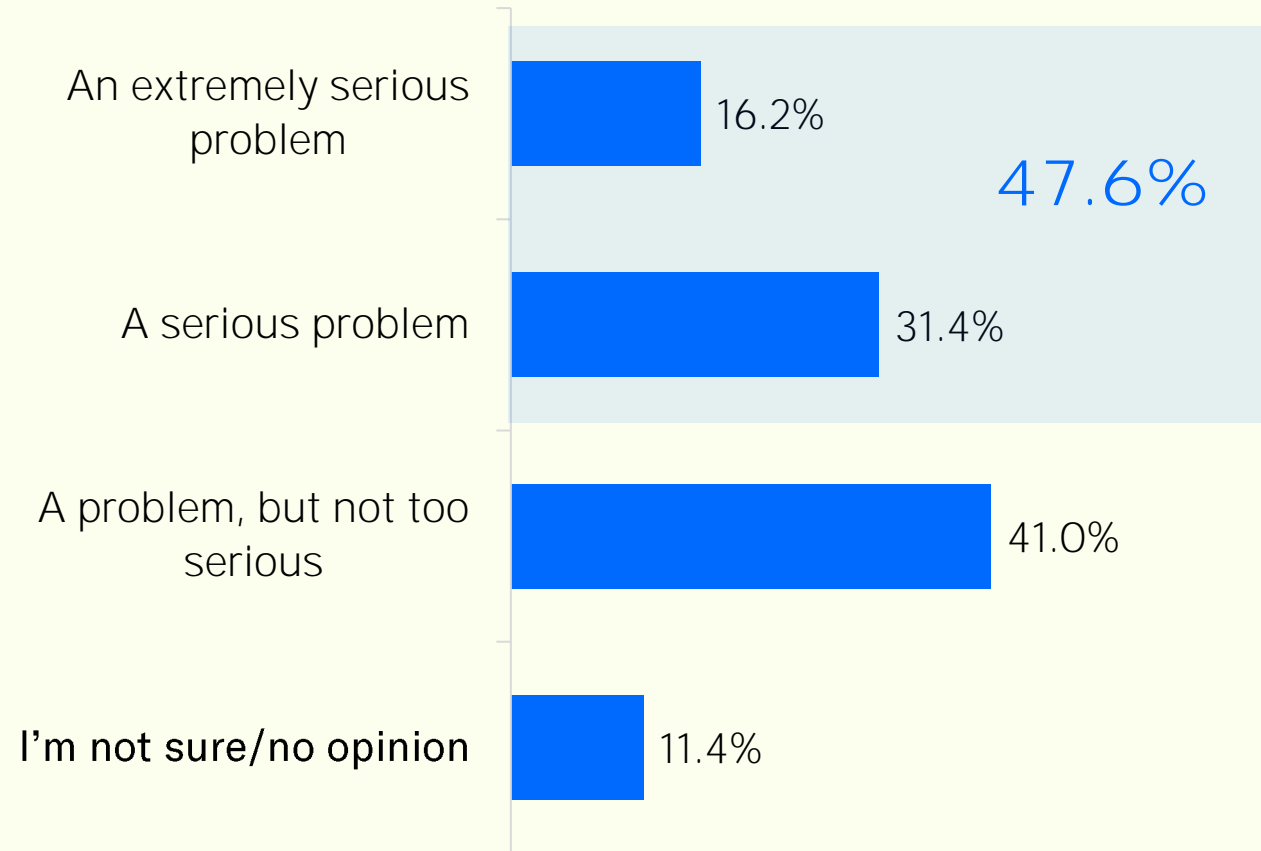


# If their Hometown Experiences Over-Tourism, it Likely Matters.

## Question:

How serious is the problem of OVER-TOURISM where you live?

Question asked only of those who feel over-tourism is a problem in their community



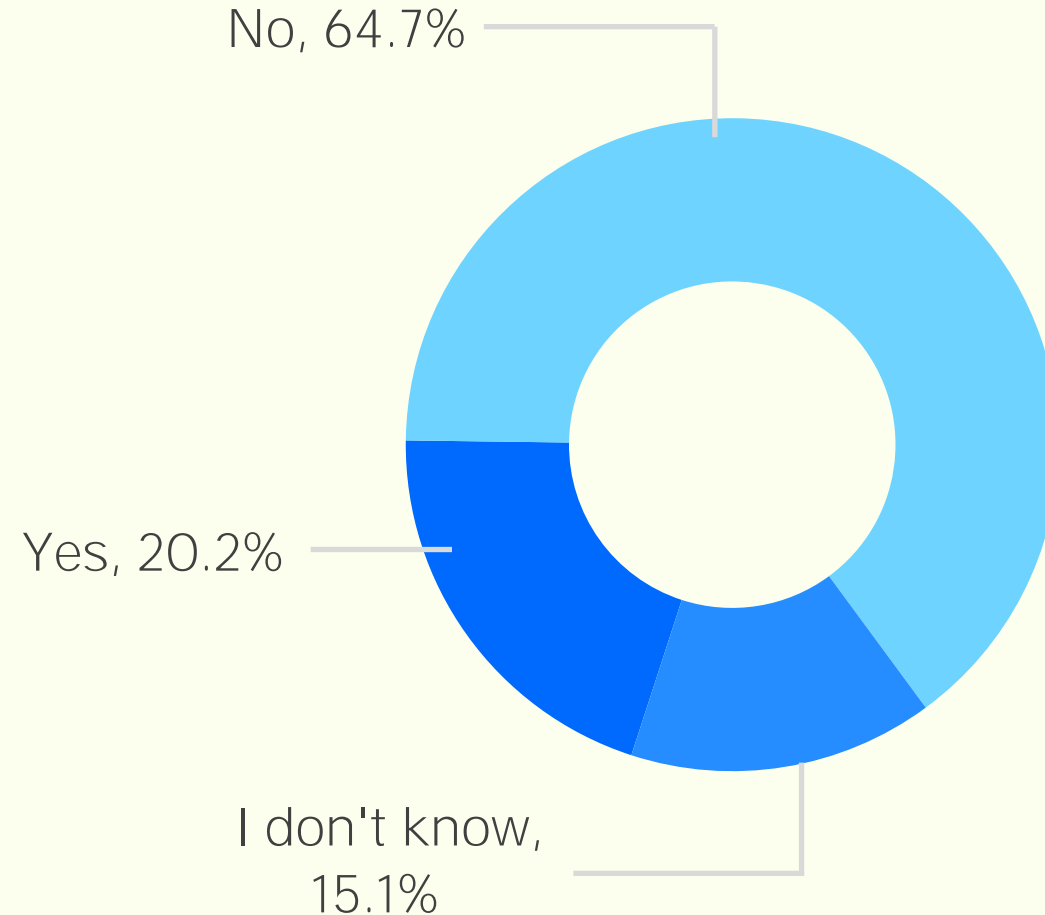
## *In Summary*

1. Financial sentiment—a key factor in travel industry performance—is uneven, with optimism centered in Millennial, high-earning and urban households
2. Travel volume has thus far withstood the pressures of economic **anxiety, driven by consumers' prioritization of travel**—but the industry needs to keep its eye on the headwinds, as its uncertain how much resilience the traveling consumer has
3. Travel planning windows continue to shrink
4. We can improve Americans awareness and understanding of the **travel industry's role locally, while managing tourism's impact into the positive realm**

# 1-in-5 Americans Believe Leisure Travel Negatively Impacts the Environment

## Question:

Do you believe that people traveling for leisure have an overall negative impact on the environment?



# The State of the American Traveler: Destination Stewardship Edition

Tuesday, November 7 @ 12 pm PT/3 pm ET



# 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



# 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

# Thank You!