The State of the American Traveler
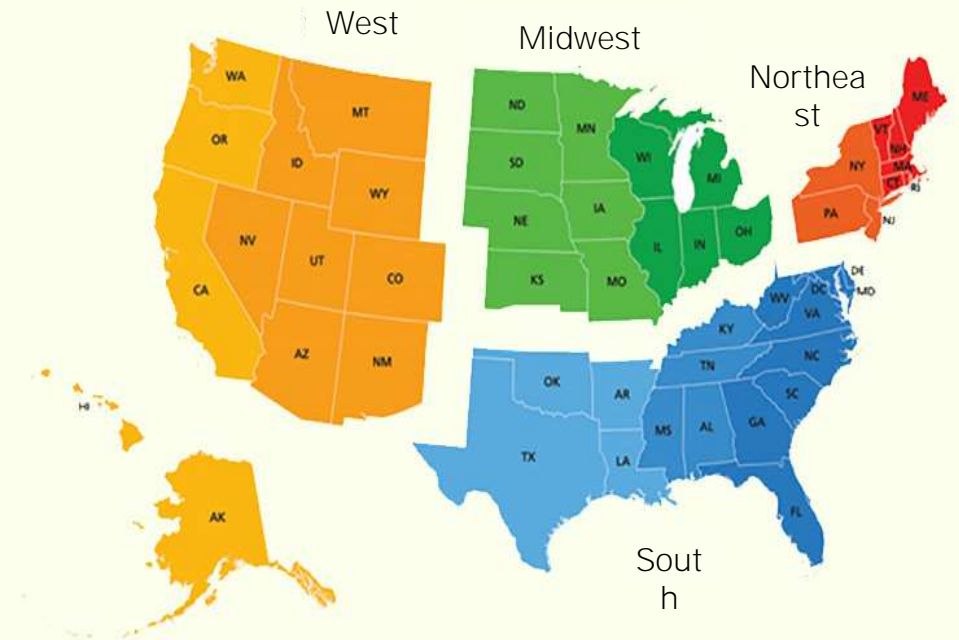
Future Partners

August 2024

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 16-27

- 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
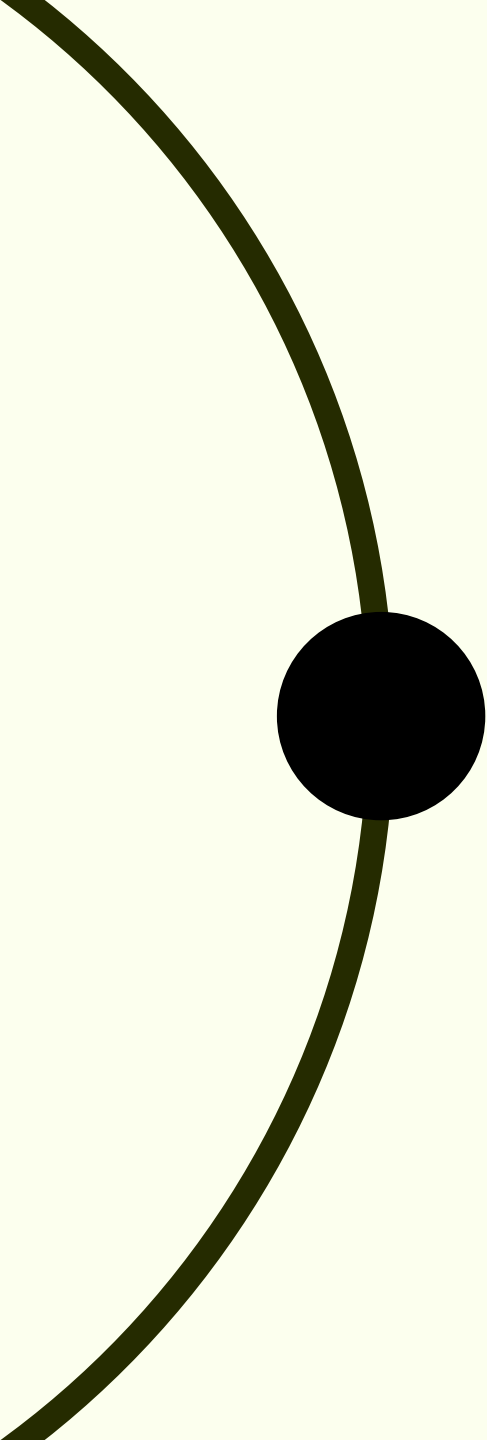

West

Midwest

Northeast

South

September Livestream Registration

Presentation deck and recording will be available on our website:

FuturePartners.com

September Livestream Registration

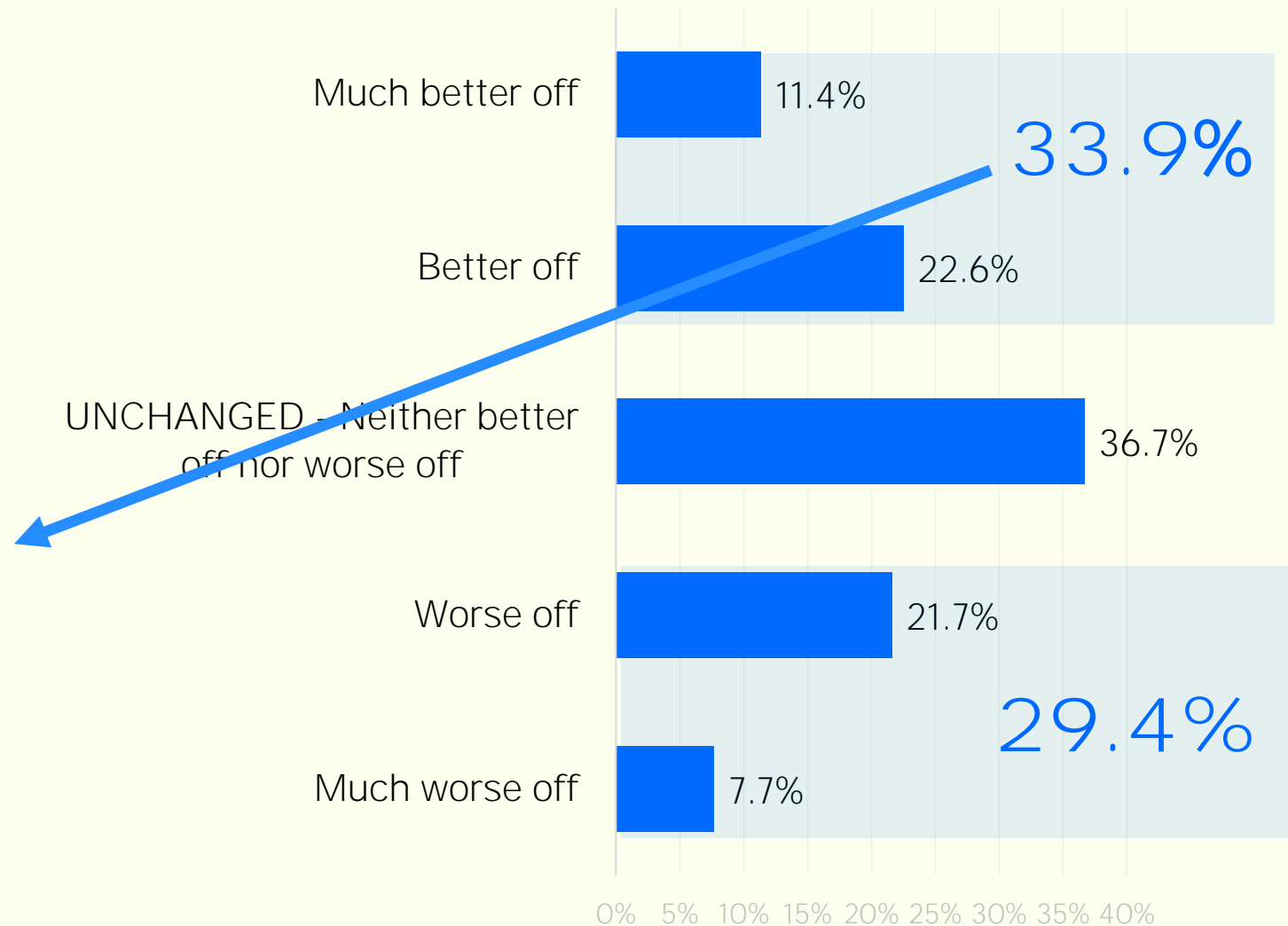# Current Sentiment

September Livestream Registration

As we have moved through Summer, traveler sentiment has remained solid.

September Livestream Registration

Cha ching! Compared to last year at this time, travelers are feeling better off financially.

Question:

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

Top 2 Box Score, by Generation

- Millennials or younger: 46.7%
- Gen X: 30.2%
- Boomer or older: 23.9%

Much better off — 11.4%

Better off — 22.6%

33.9%

UNCHANGED - Neither better off nor worse off — 36.7%

Worse off — 21.7%

29.4%

Much worse off — 7.7%

0% 5% 10% 15% 20% 25% 30% 35% 40%
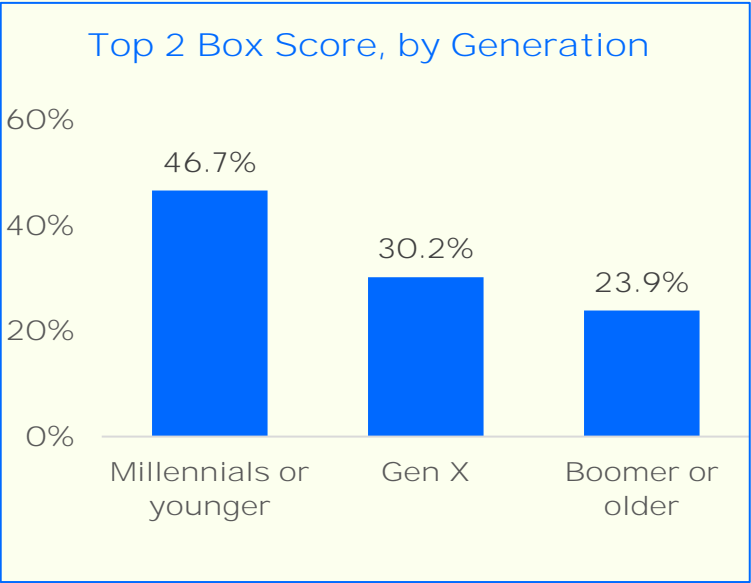
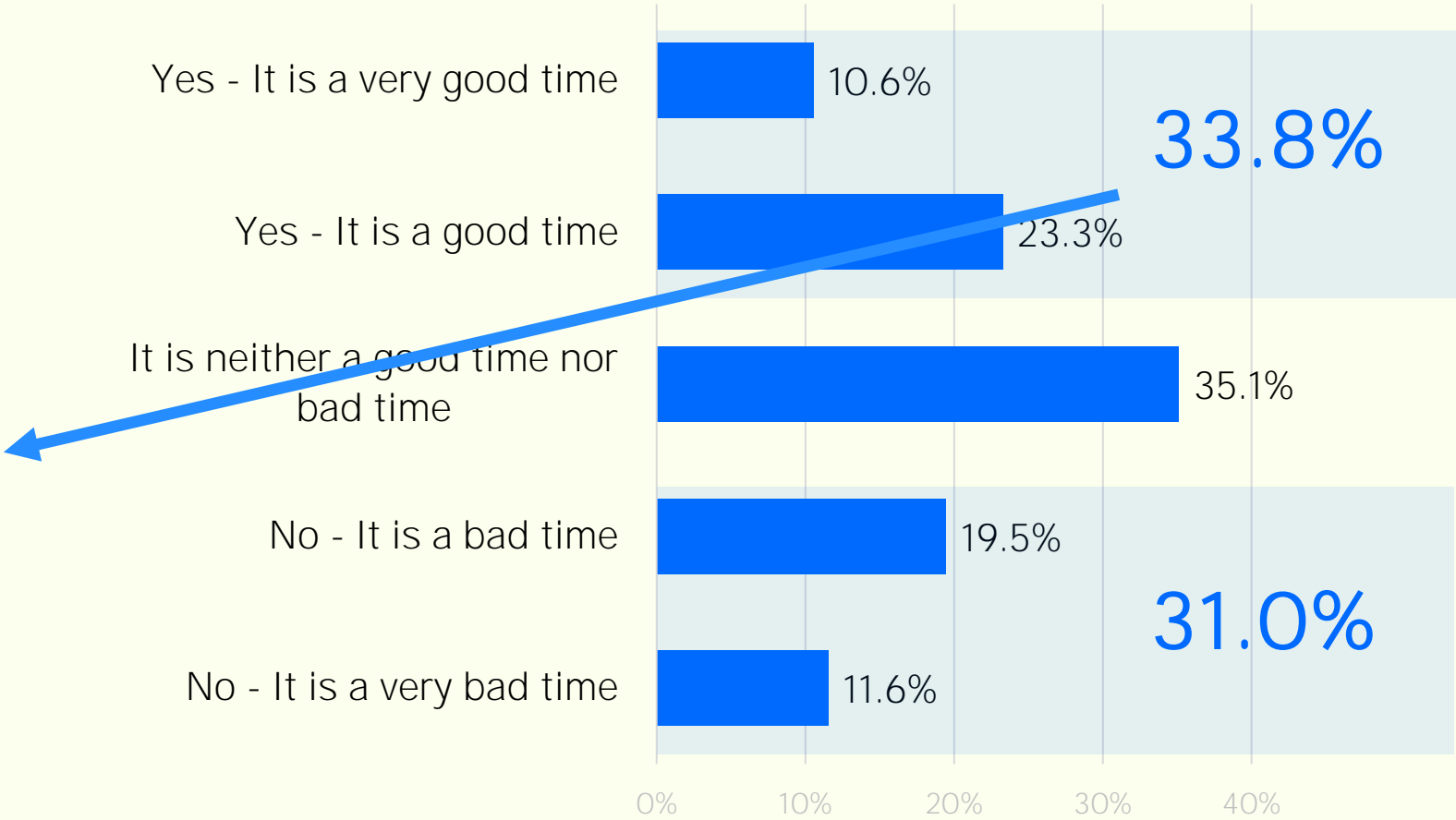# Upward trend: The proportion of travelers feeling **"better off financially" moved forward this month.**

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

July 2022 = 25.8%   July 2023 = 27.3%   June 2024 = 33.9%

January 2022: 33.5%
February 2022: 32.8%
March 2022: 34.5%
April 2022: 27.2%
May 2022: 32.8%
June 2022: 32.8%
July 2022: 25.8%
August 2022: 27.0%
September 2022: 25.0%
October 2022: 26.9%
November 2022: 26.3%
December 2022: 26.0%
January 2023: 30.1%
February 2023: 30.1%
March 2023: 32.4%
April 2023: 29.1%
May 2023: 29.5%
June 2023: 30.9%
July 2023: 30.7% / 27.3%
August 2023: 28.4%
Oct 2023: 34.8%
Nov 2023: 34.1%
Dec 2023: 32.8%
Jan 2024: 31.3%
Feb 2024: 32.3%
Mar 2024: 33.0%
Apr 2024: 30.2%
May 2024: 30.5%
June 2024: 32.5%
July 2024: 33.9%

Should we stay or should we go? Travelers remain split on if now is a good time to spend on leisure travel.

Question:

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

Top 2 Box Score, by Generation

Generation	Score
Millennials or younger	39.1%
Gen X	29.3%
Boomer or older	32.1%

Yes - It is a very good time — 10.6%

Yes - It is a good time — 23.3%

33.8%

It is neither a good time nor bad time — 35.1%

No - It is a bad time — 19.5%

31.0%

No - It is a very bad time — 11.6%
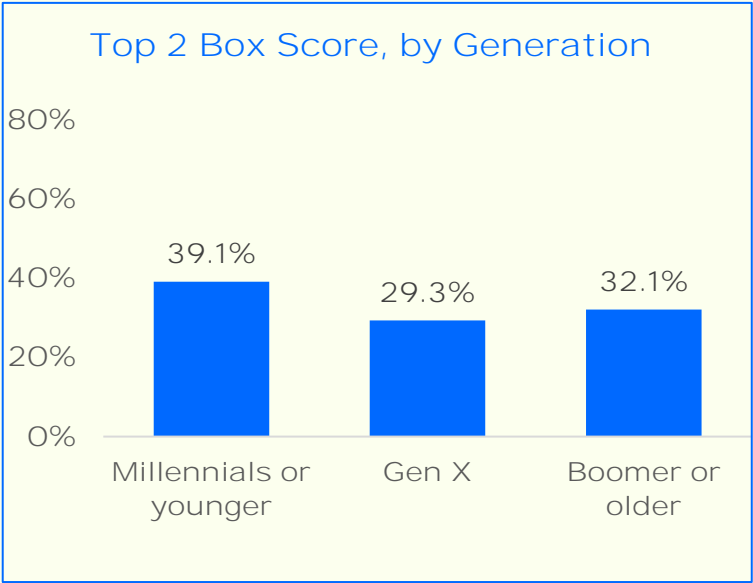
The belief that now is a "good time to spend on leisure travel" is holding steady.
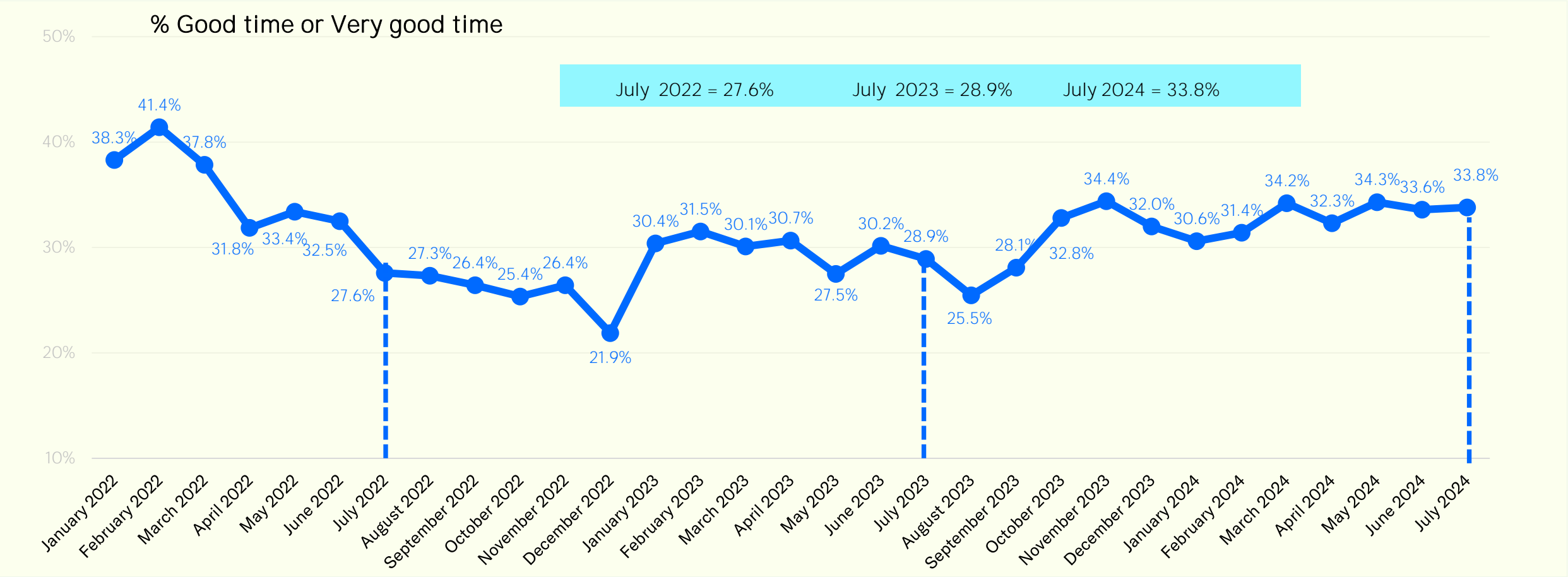
Question:
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

% Good time or Very good time

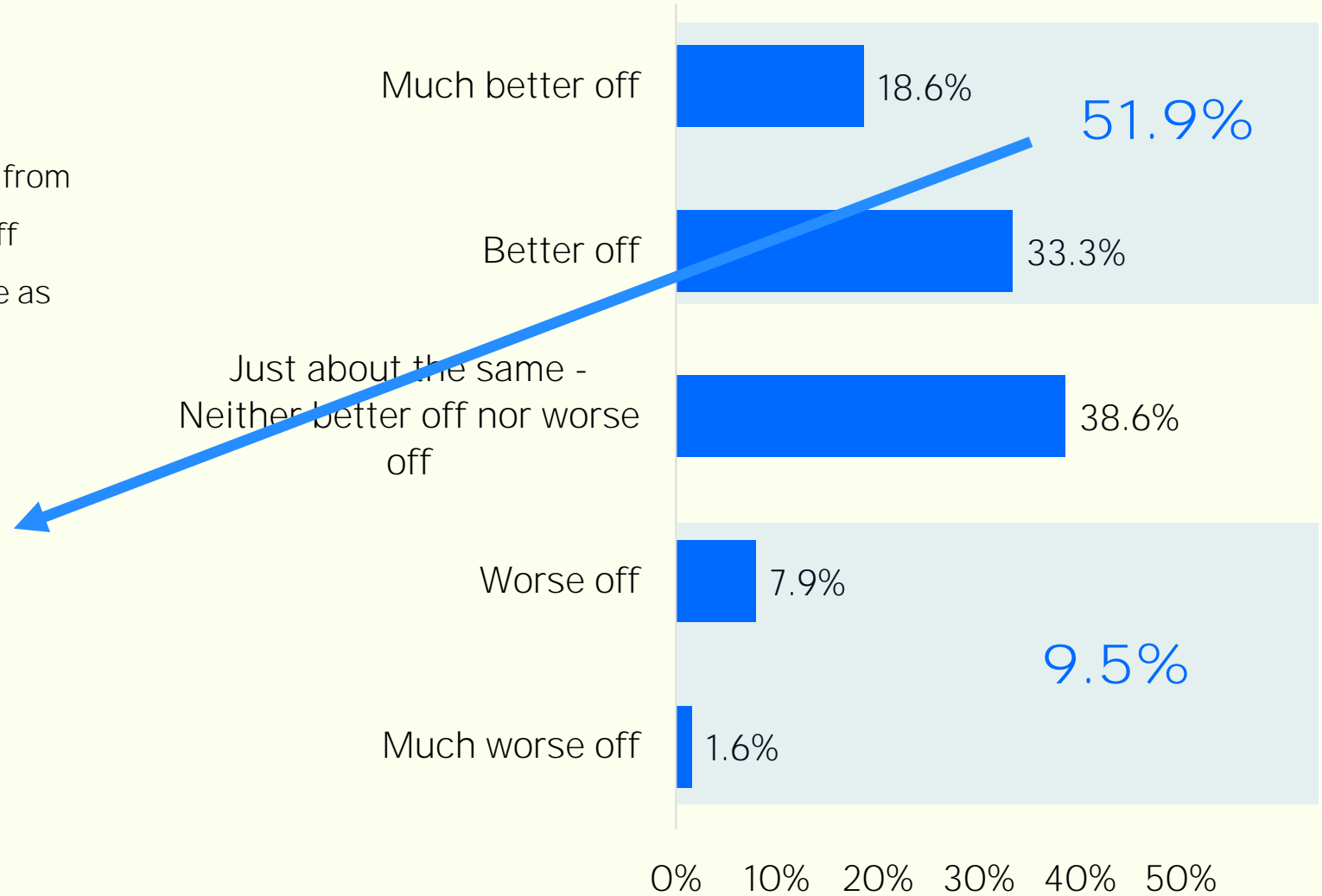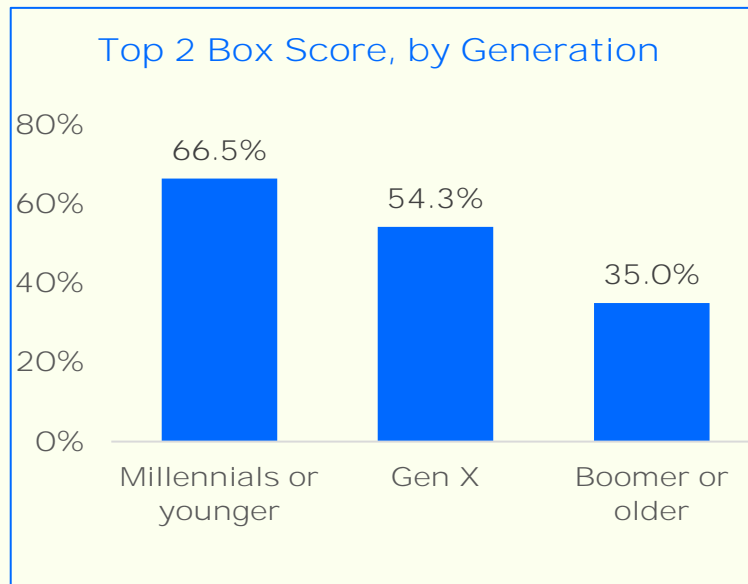July 2022 = 27.6%   July 2023 = 28.9%   July 2024 = 33.8%

Looking Forward

Future Partners

Future's so bright: Travelers remain optimistic about their personal financial outlooks.

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?

Top 2 Box Score, by Generation

Millennials or younger	66.5%
Gen X	54.3%
Boomer or older	35.0%

51.9%

Much better off	18.6%
Better off	33.3%
Just about the same - Neither better off nor worse off	38.6%
Worse off	7.9%
Much worse off	1.6%

9.5%

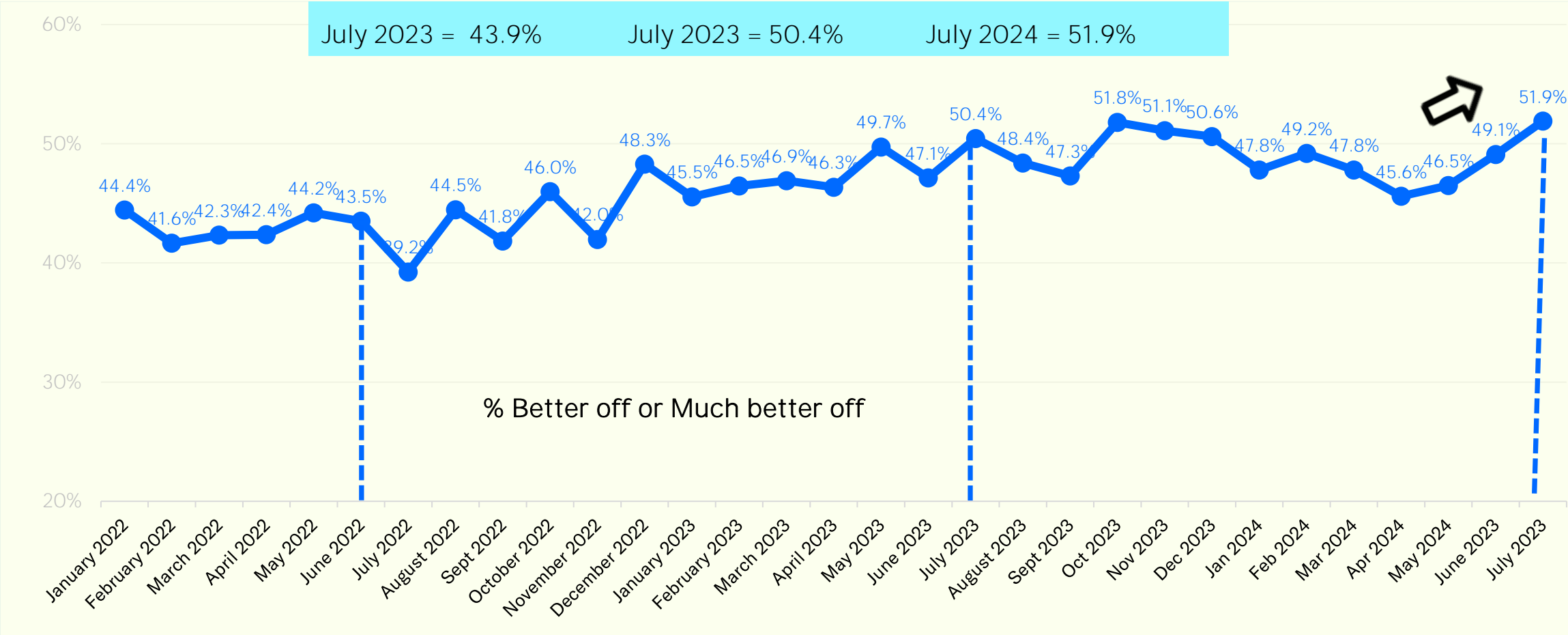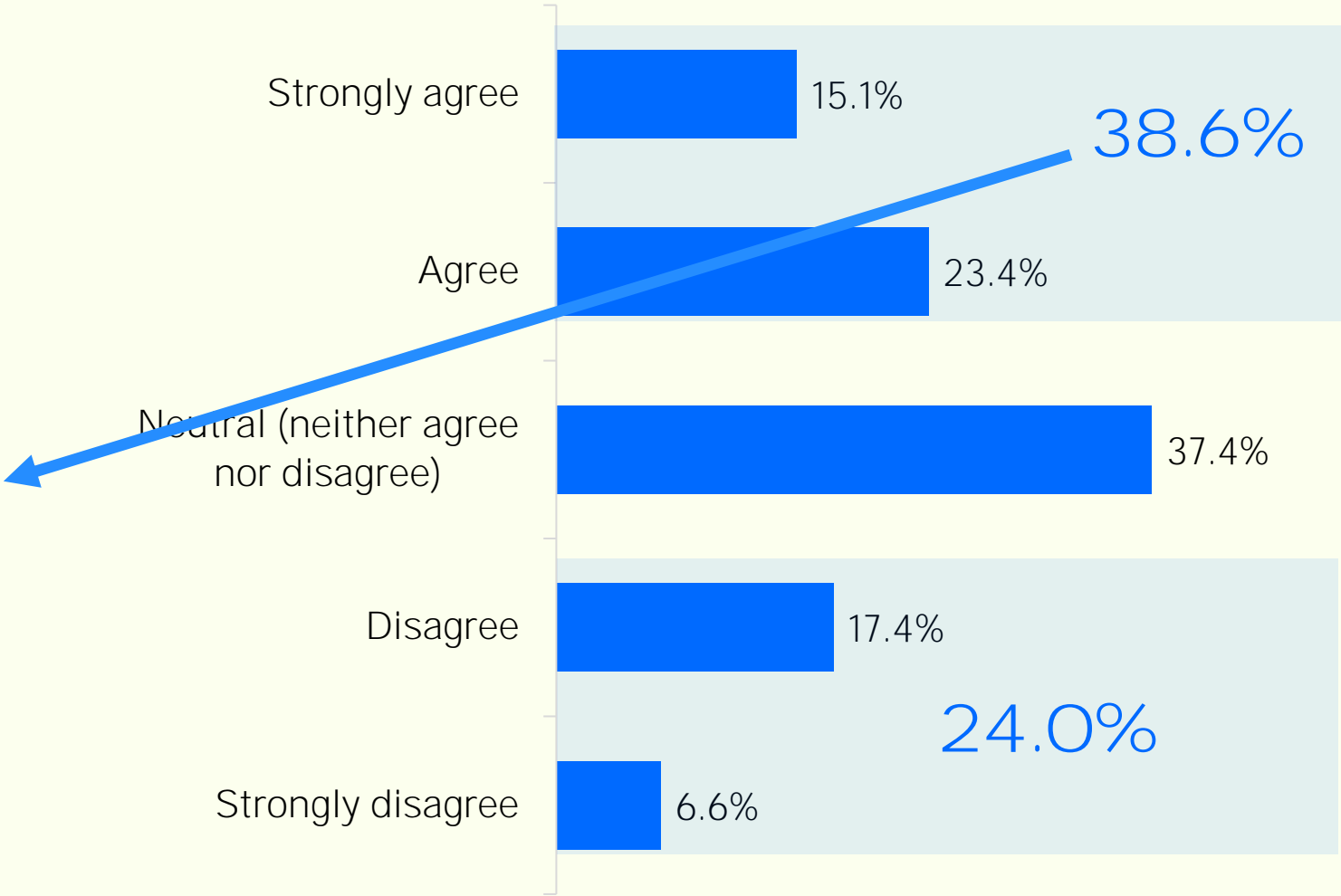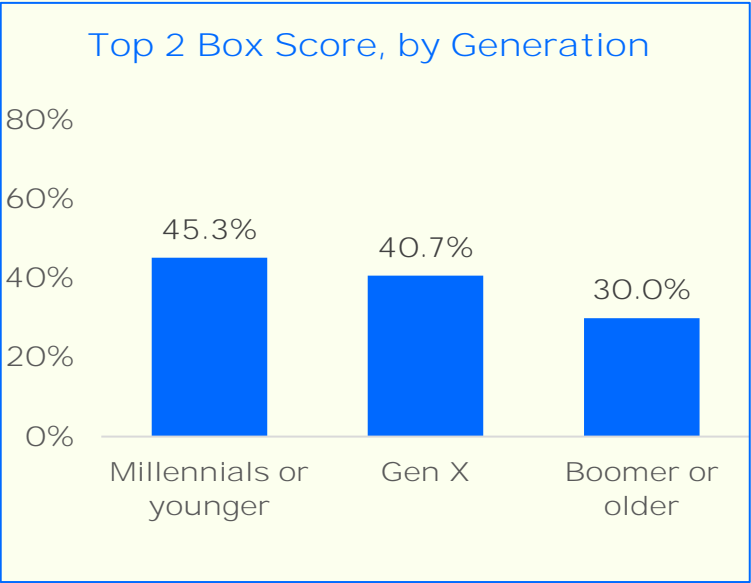# Onward and upward: Financial optimism keeps edging forward.

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?

July 2023 = 43.9%   July 2023 = 50.4%   July 2024 = 51.9%

% Better off or Much better off

Fading concerns: Recessionary expectations decline among American travelers

Question:

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

Top 2 Box Score, by Generation

	Millennials or younger	Gen X	Boomer or older
	45.3%	40.7%	30.0%

Strongly agree — 15.1%

38.6%

Agree — 23.4%

Neutral (neither agree nor disagree) — 37.4%

Disagree — 17.4%

24.0%

Strongly disagree — 6.6%

The State of the American Traveler livestream, July 2024

Base: All respondents, 4,004 completed surveys

Recessionary concerns dipped again last month.

Statement:

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

% Agree or Strongly agree

July 2023 = 49.4%   July 2024 = 38.6%

- 63.6%
- 65.5%
- 59.7%
- 56.5%
- 57.2%
- 53.6%
- 54.6%
- 57.0%
- 58.8%
- 52.6%
- 49.4%
- 50.1%
- 52.1%
- 52.1%
- 48.4%
- 44.7%
- 43.5%
- 41.8%
- 39.2%
- 42.5%
- 42.5%
- 40.8%
- 38.6%

September 2022, October 2022, November 2022, December 2022, January 2023, February 2023, March 2023, April 2023, May 2023, June 2023, July 2023, August 2023, September 2023, October 2023, November 2023, December 2023, January 2024, February 2024, March 2024, April 2024, May 2024, June 2024, July 2024

The State of the American Traveler livestream, July 2024

Base: All respondents, approx. 4,004 completed surveys per wave

# Energized: 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)

Top 2 Box Score, by Generation

86.3%	87.4%	84.4%
Millennials or younger	Gen X	Boomer or older

100%
80%
60%

85.9%

Rating	%
10 - I am extremely excited	41.7%
9	11.8%
8	16.4%
7	11.0%
6	5.1%
5	6.6%
4	1.9%
3	1.7%
2	1.0%
1	0.6%
0 - I am not at all excited	2.3%

0%   10%   20%   30%   40%   50%

Base: All respondents, 4,004 completed surveys
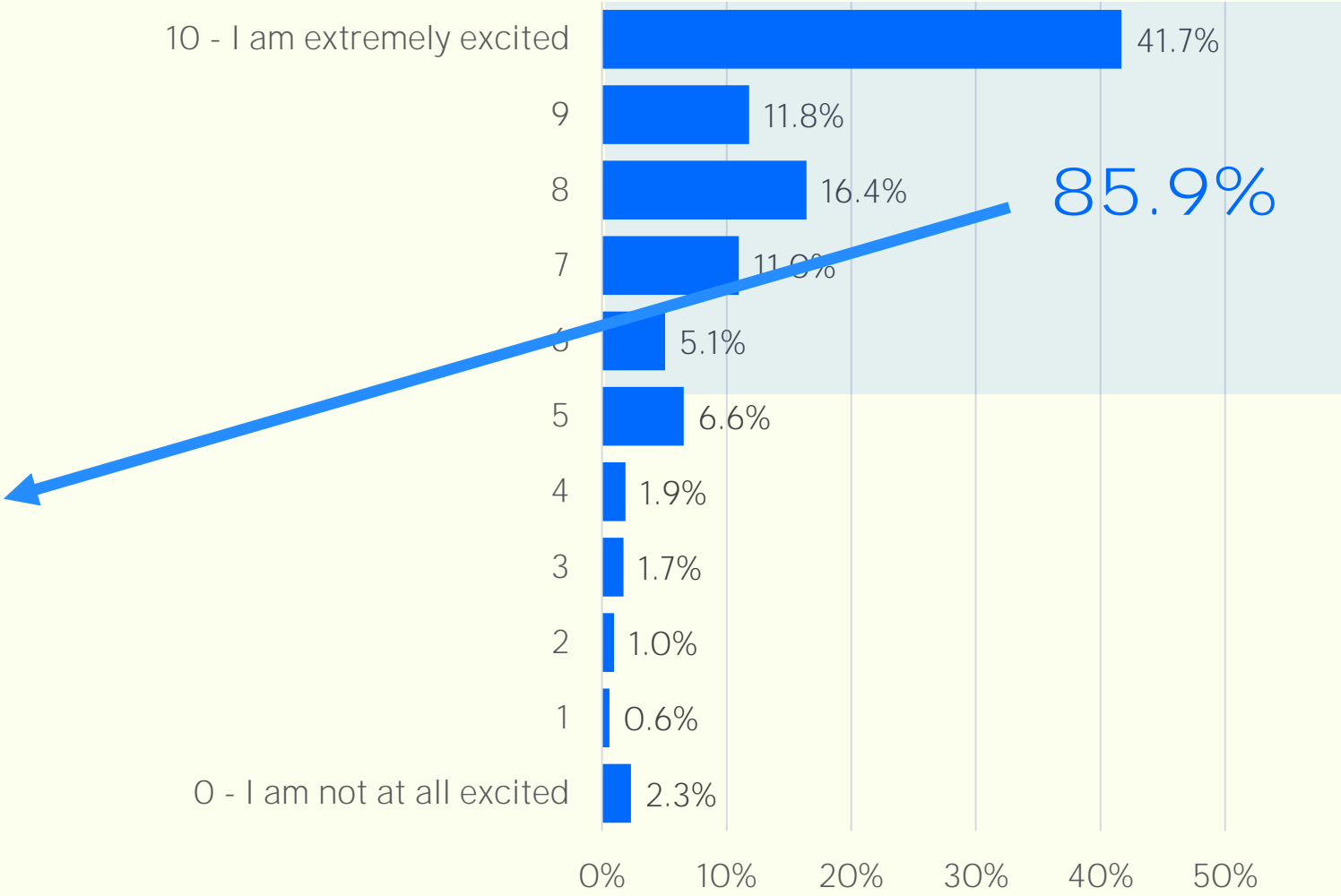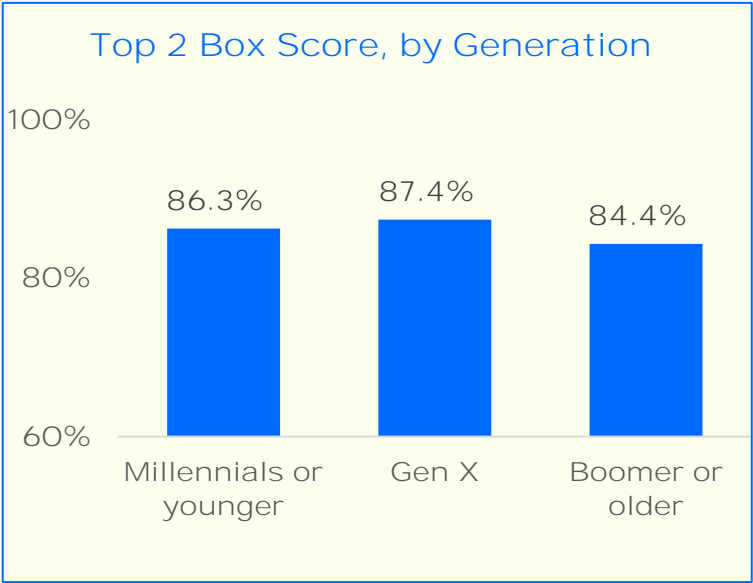
Excitement to travel remains at near record levels.

Questbion:
Which est describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?
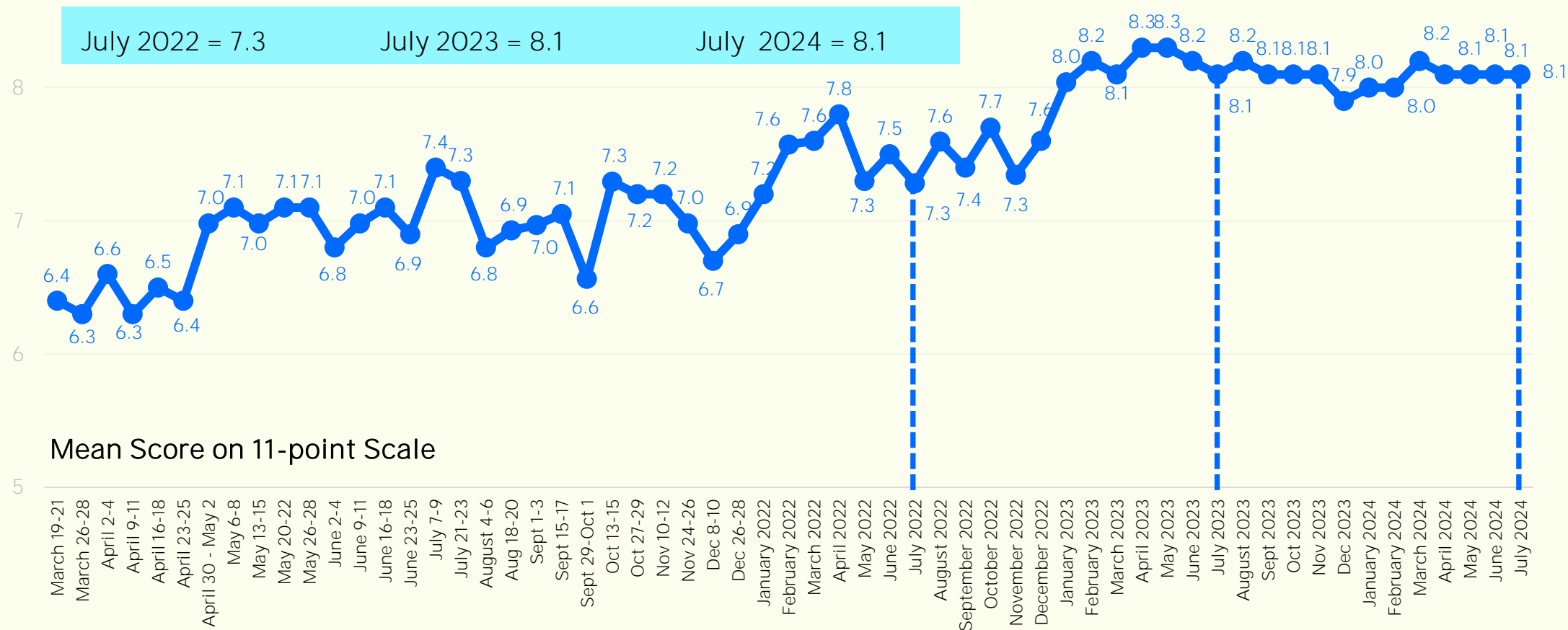
July 2022 = 7.3   July 2023 = 8.1   July 2024 = 8.1

Mean Score on 11-point Scale

Expected travel budgets remain above their long-term 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 Avg Travel Budget, by Generation

Millennials or younger	$3,562
Gen X	$4,472
Boomer or older	$5,351

$10,000 or more	15.5%
$5,000 - $9,999	18.1%
$2,000 - $4,999	25.9%
$1,000 - $1,999	15.6%
$500 - $999	10.5%
$100 - $499	8.3%
Under $100	6.0%

Mean = $4,553
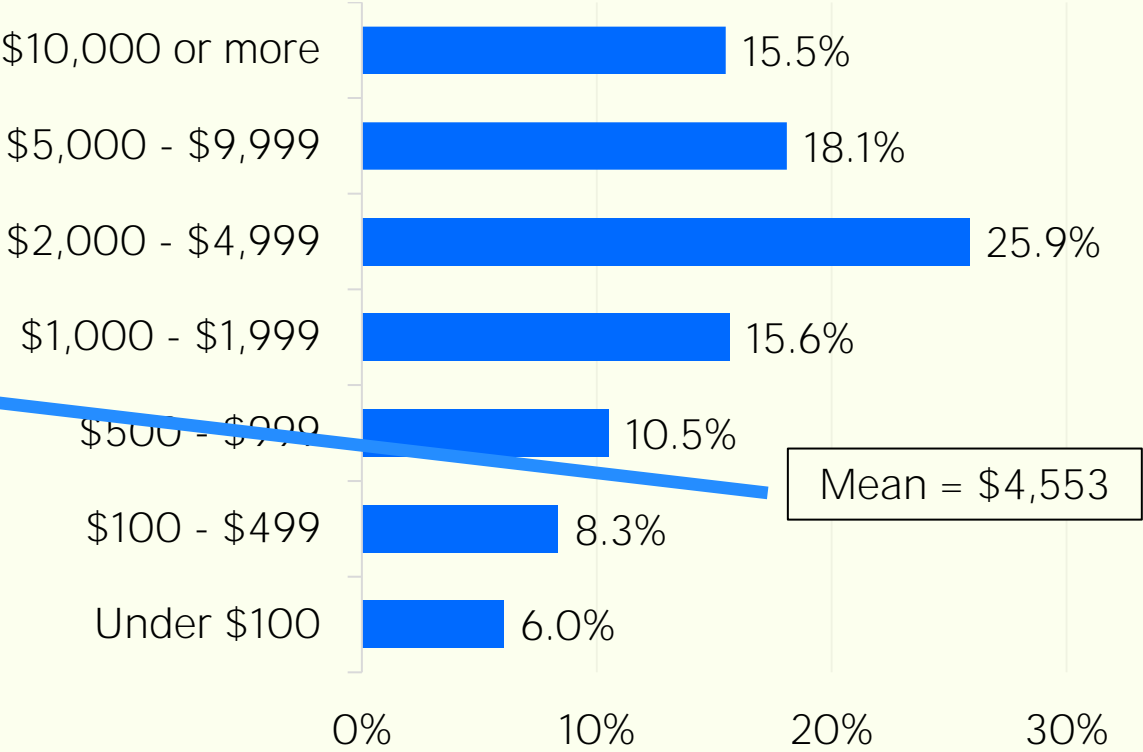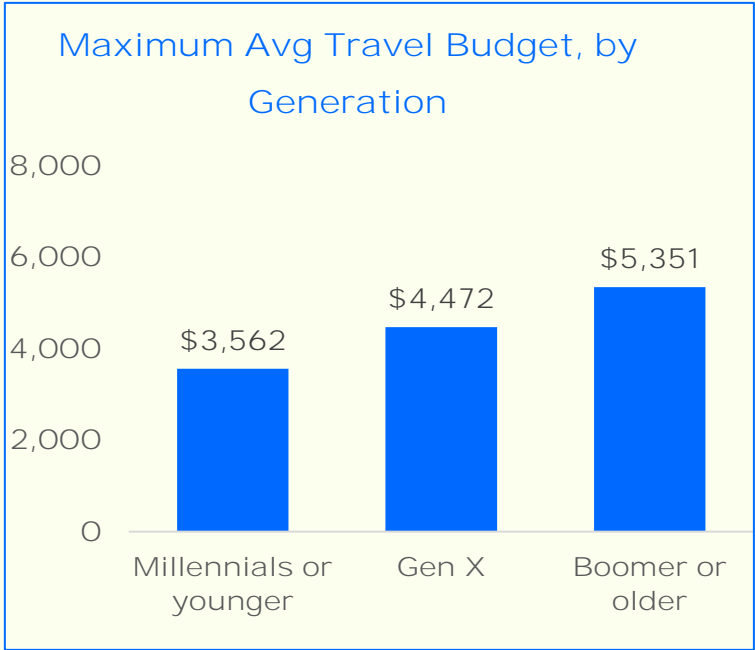
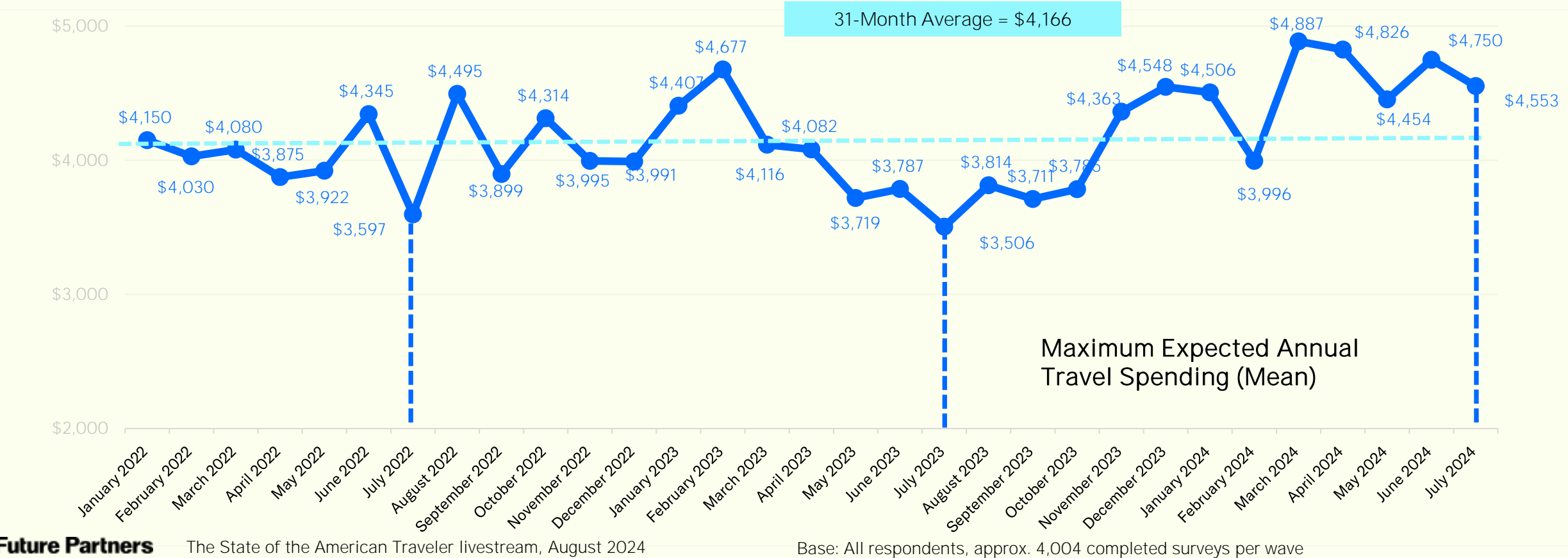# Expected travel budgets remain above their long-term average.

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):

31-Month Average = $4,166

Maximum Expected Annual Travel Spending (Mean)

$4,150
$4,030
$4,080
$3,875
$3,922
$3,597
$4,345
$4,495
$3,899
$4,314
$3,995
$3,991
$4,407
$4,677
$4,116
$4,082
$3,719
$3,787
$3,506
$3,814
$3,711
$3,785
$4,363
$4,548
$4,506
$3,996
$4,887
$4,826
$4,454
$4,750
$4,553

Future Partners   The State of the American Traveler livestream, August 2024   Base: All respondents, approx. 4,004 completed surveys per wave
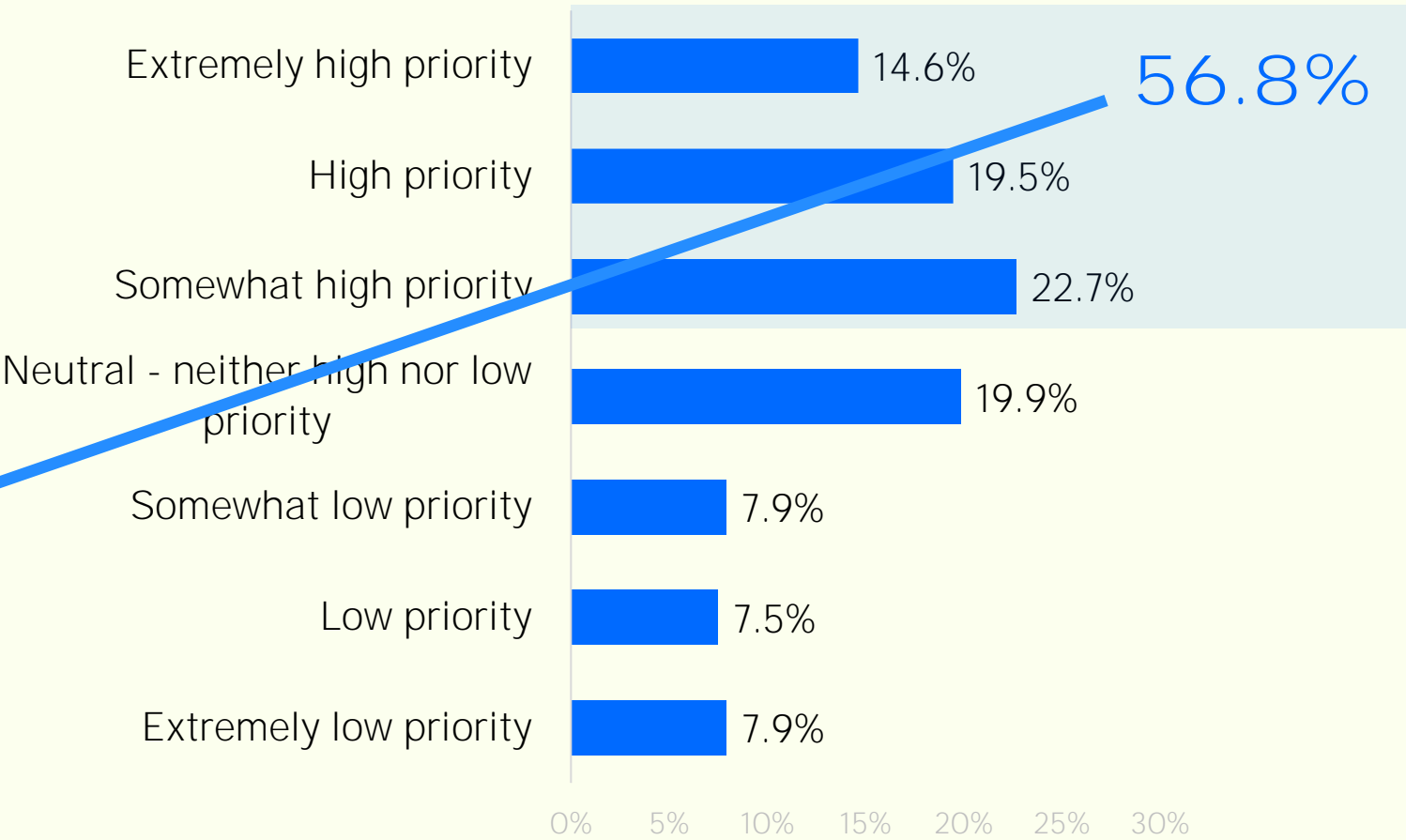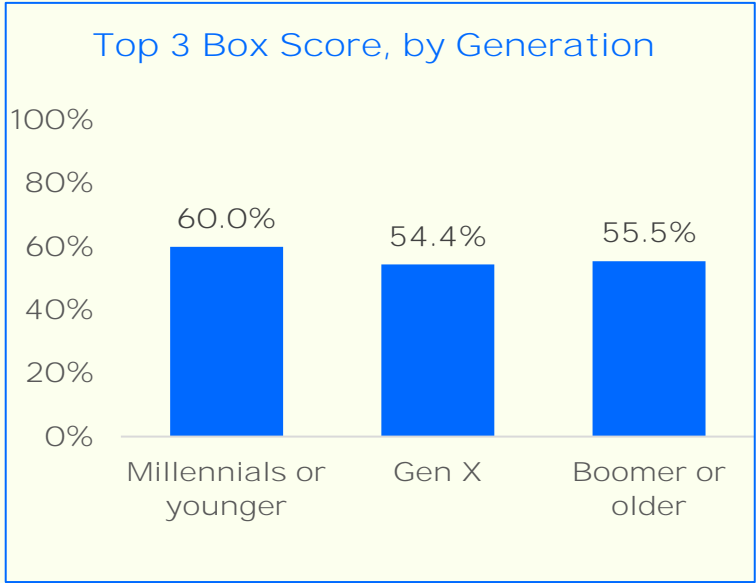
Most intend to make leisure travel a spending priority in the next three months.
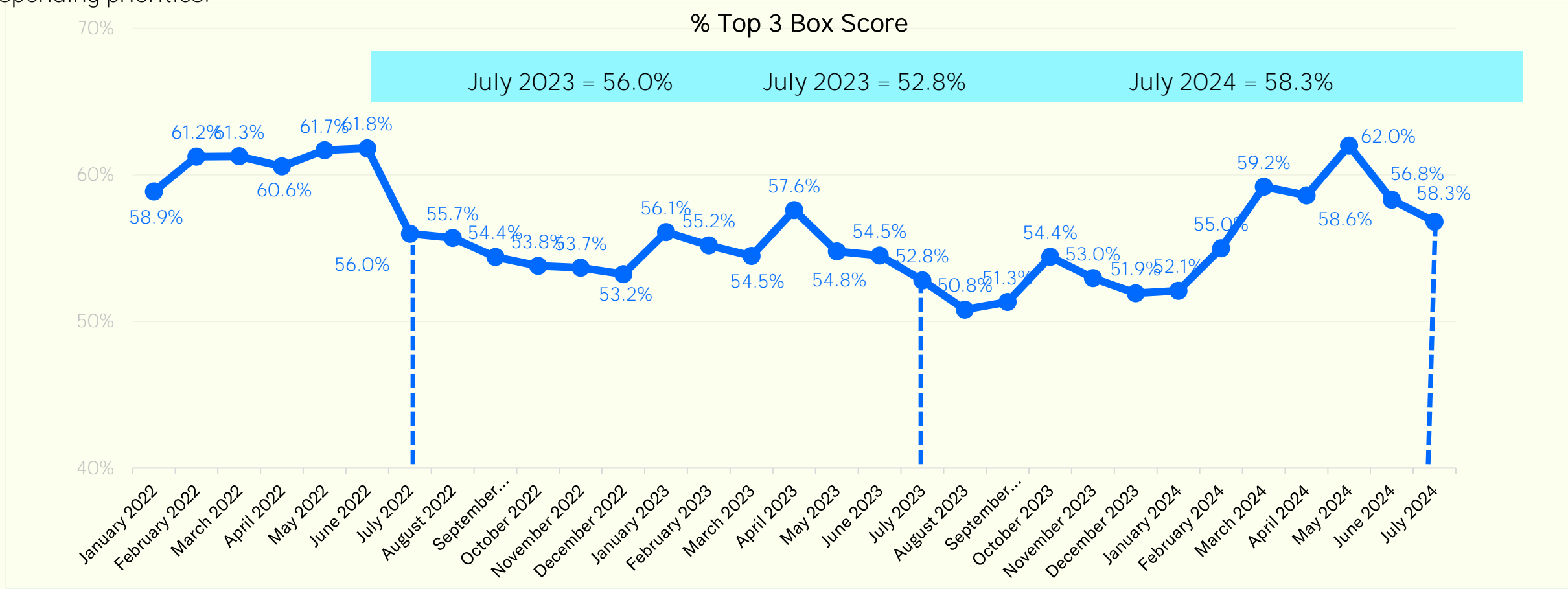
Question:

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) _____.

Top 3 Box Score, by Generation

Generation	Score
Millennials or younger	60.0%
Gen X	54.4%
Boomer or older	55.5%

56.8%

Priority	%
Extremely high priority	14.6%
High priority	19.5%
Somewhat high priority	22.7%
Neutral - neither high nor low priority	19.9%
Somewhat low priority	7.9%
Low priority	7.5%
Extremely low priority	7.9%

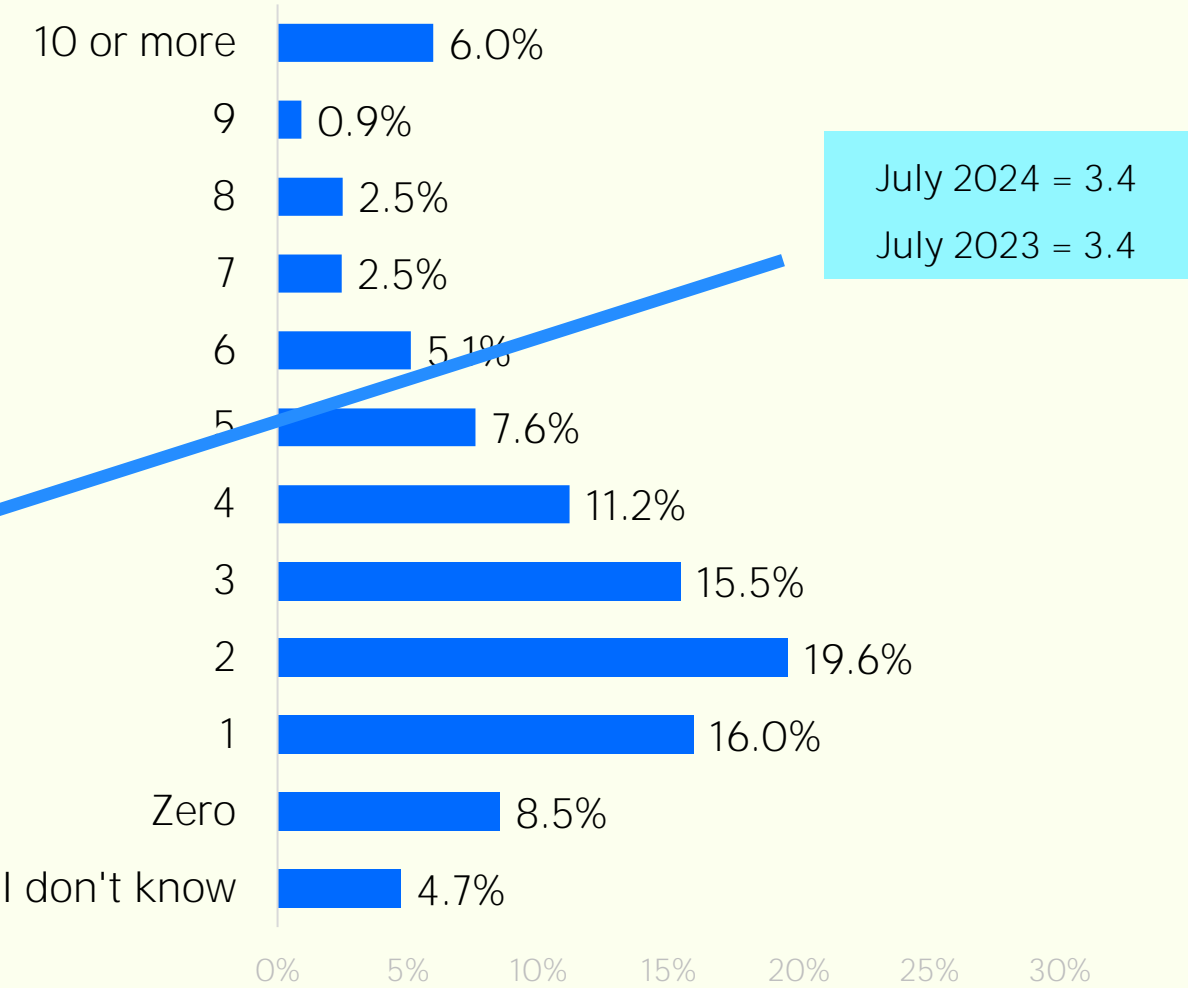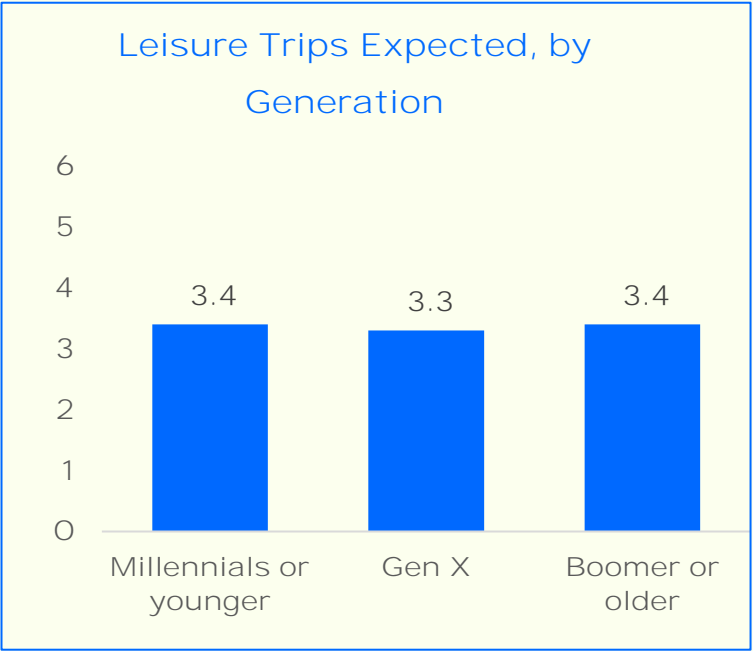# ...the metric dipped last month, but remains well above last year's level.

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.

% Top 3 Box Score

July 2023 = 56.0%   July 2023 = 52.8%   July 2024 = 58.3%

58.9% 61.2% 61.3% 60.6% 61.7% 61.8% 56.0% 55.7% 54.4% 53.8% 53.7% 53.2% 56.1% 55.2% 54.5% 57.6% 54.8% 54.5% 52.8% 50.8% 51.3% 54.4% 53.0% 51.9% 52.1% 55.0% 59.2% 58.6% 62.0% 56.8% 58.3%

January 2022, February 2022, March 2022, April 2022, May 2022, June 2022, July 2022, August 2022, September..., October 2022, November 2022, December 2022, January 2023, February 2023, March 2023, April 2023, May 2023, June 2023, July 2023, August 2023, September..., October 2023, November 2023, December 2023, January 2024, February 2024, March 2024, April 2024, May 2024, June 2024, July 2024

Expected travel volume held steady in June.

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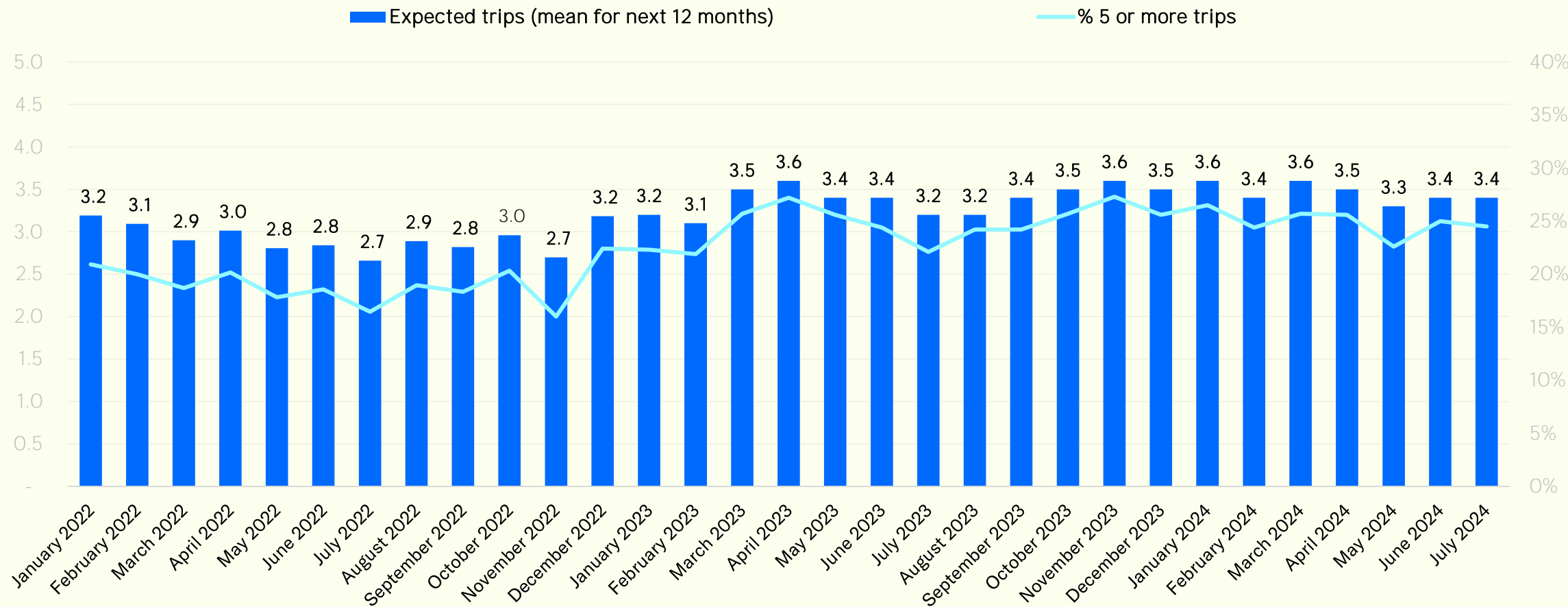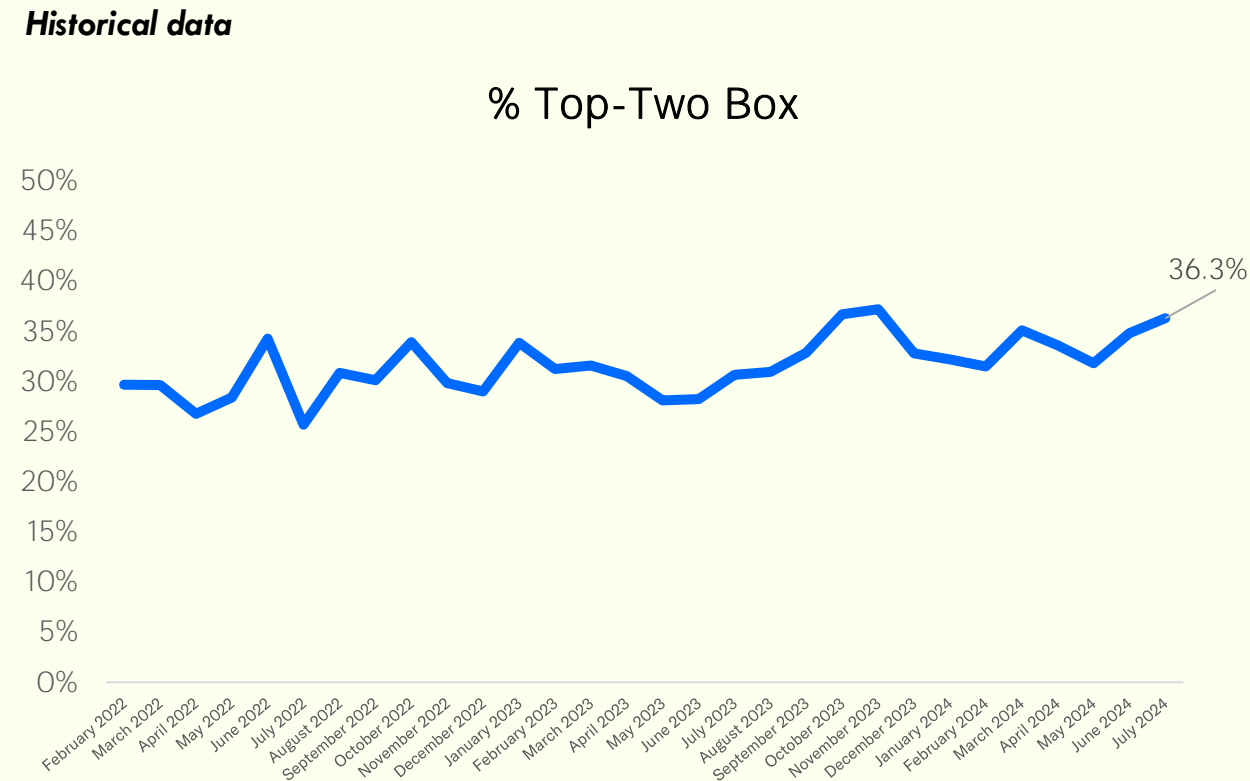
IN TOTAL, how many leisure trips
(of 50 miles or more from your
home) do you expect to take
in NEXT TWELVE (12) MONTHS?

Leisure Trips Expected, by Generation

	3.4	3.3	3.4
	Millennials or younger	Gen X	Boomer or older

July 2024 = 3.4
July 2023 = 3.4

10 or more	6.0%
9	0.9%
8	2.5%
7	2.5%
6	5.1%
5	7.6%
4	11.2%
3	15.5%
2	19.6%
1	16.0%
Zero	8.5%
I don't know	4.7%

0%   5%   10%   15%   20%   25%   30%

Travel expectations held constant this month.

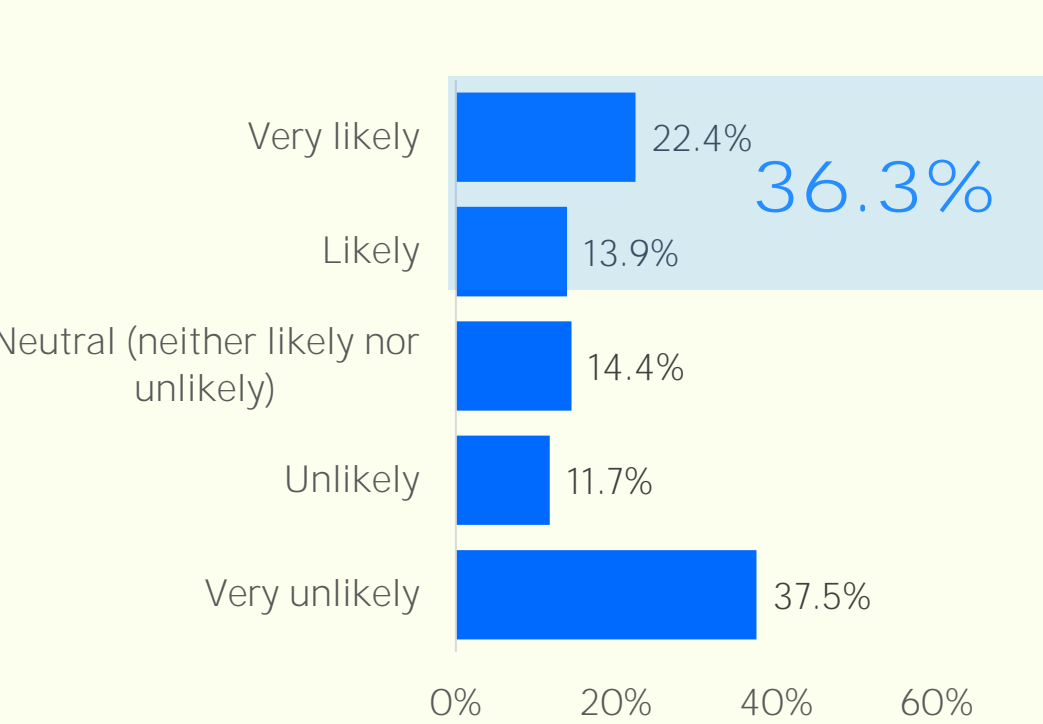Question:

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)   **—— % 5 or more trips**

Month	Expected trips
January 2022	3.2
February 2022	3.1
March 2022	2.9
April 2022	3.0
May 2022	2.8
June 2022	2.8
July 2022	2.7
August 2022	2.9
September 2022	2.8
October 2022	3.0
November 2022	2.7
December 2022	3.2
January 2023	3.2
February 2023	3.1
March 2023	3.5
April 2023	3.6
May 2023	3.4
June 2023	3.4
July 2023	3.2
August 2023	3.2
September 2023	3.4
October 2023	3.5
November 2023	3.6
December 2023	3.5
January 2024	3.6
February 2024	3.4
March 2024	3.6
April 2024	3.5
May 2024	3.3
June 2024	3.4
July 2024	3.4

Future Partners   The State of the American Traveler livestream, August 2024   Base: All respondents, approx. 4,004 completed surveys per wave
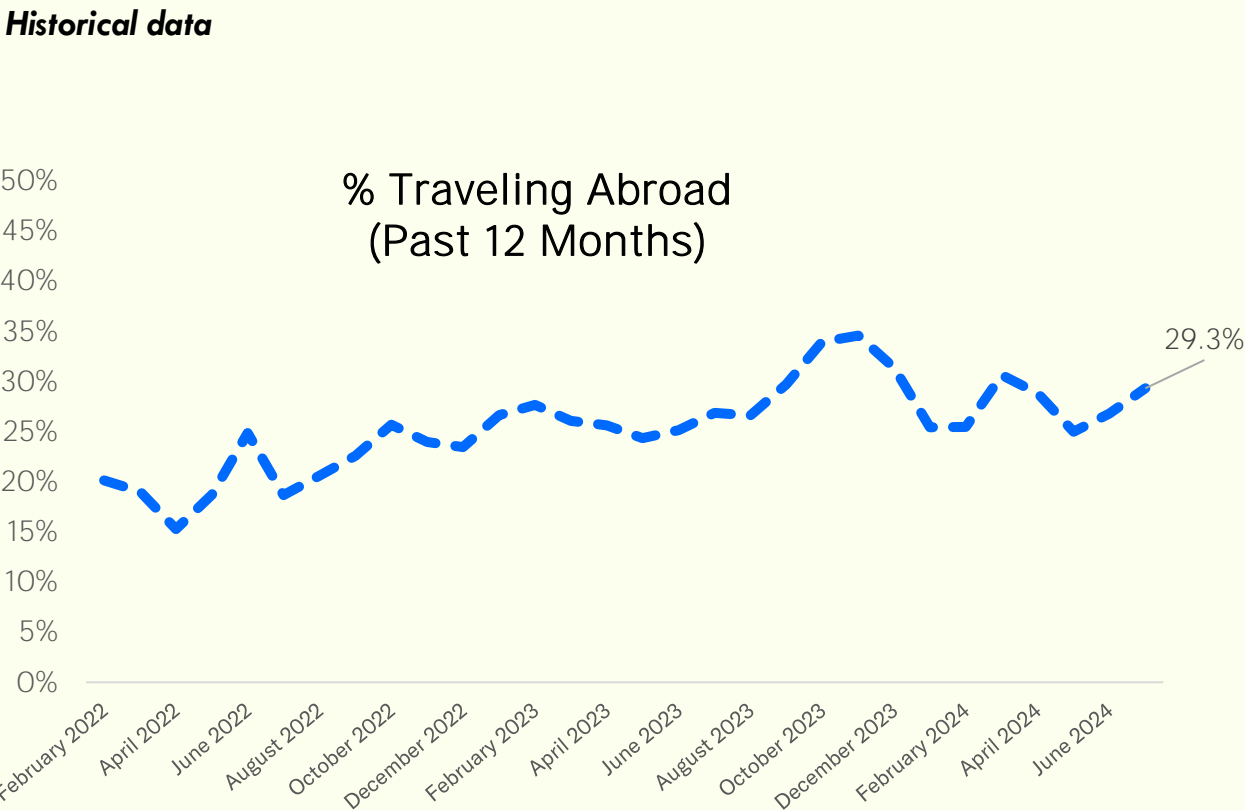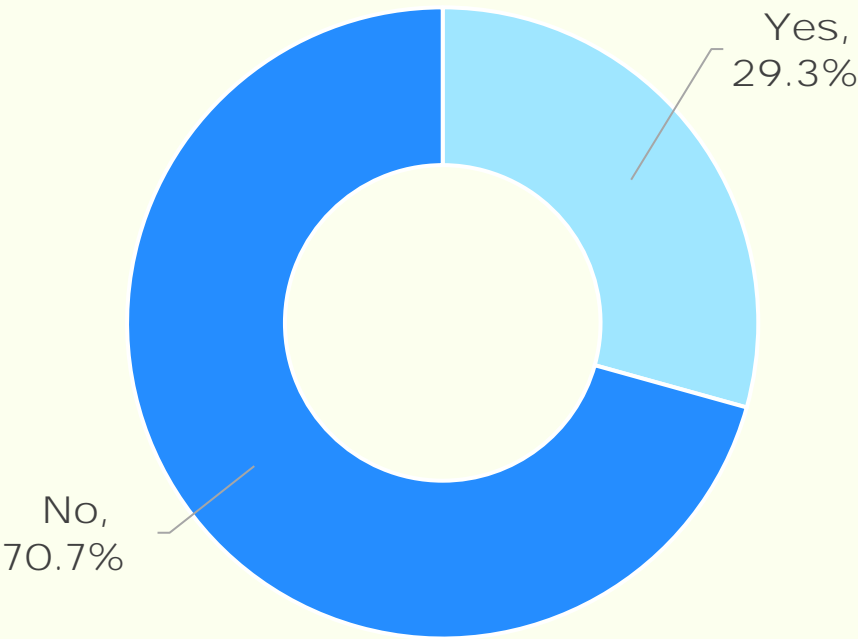
...expectations to travel abroad in the next 12 months moved forward slightly this month.

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

Historical data

% Top-Two Box

36.3%

Very likely — 22.4%
Likely — 13.9%
Neutral (neither likely nor unlikely) — 14.4%
Unlikely — 11.7%
Very unlikely — 37.5%

Base: All respondents, 4,004 completed surveys

International travel reported by Americans also rose last month.

Question: In the PAST 12 MONTHS, have you traveled outside the United States?

Historical data

Yes, 29.3%

No, 70.7%

% Traveling Abroad
(Past 12 Months)

29.3%

Likelihood to travel abroad and actual international travel move closely together.

% Likely or Very likely to Travel Abroad (Next 12 Months)

% Traveling Abroad (Past 12 Months)

20.1%

36.3%

29.3%
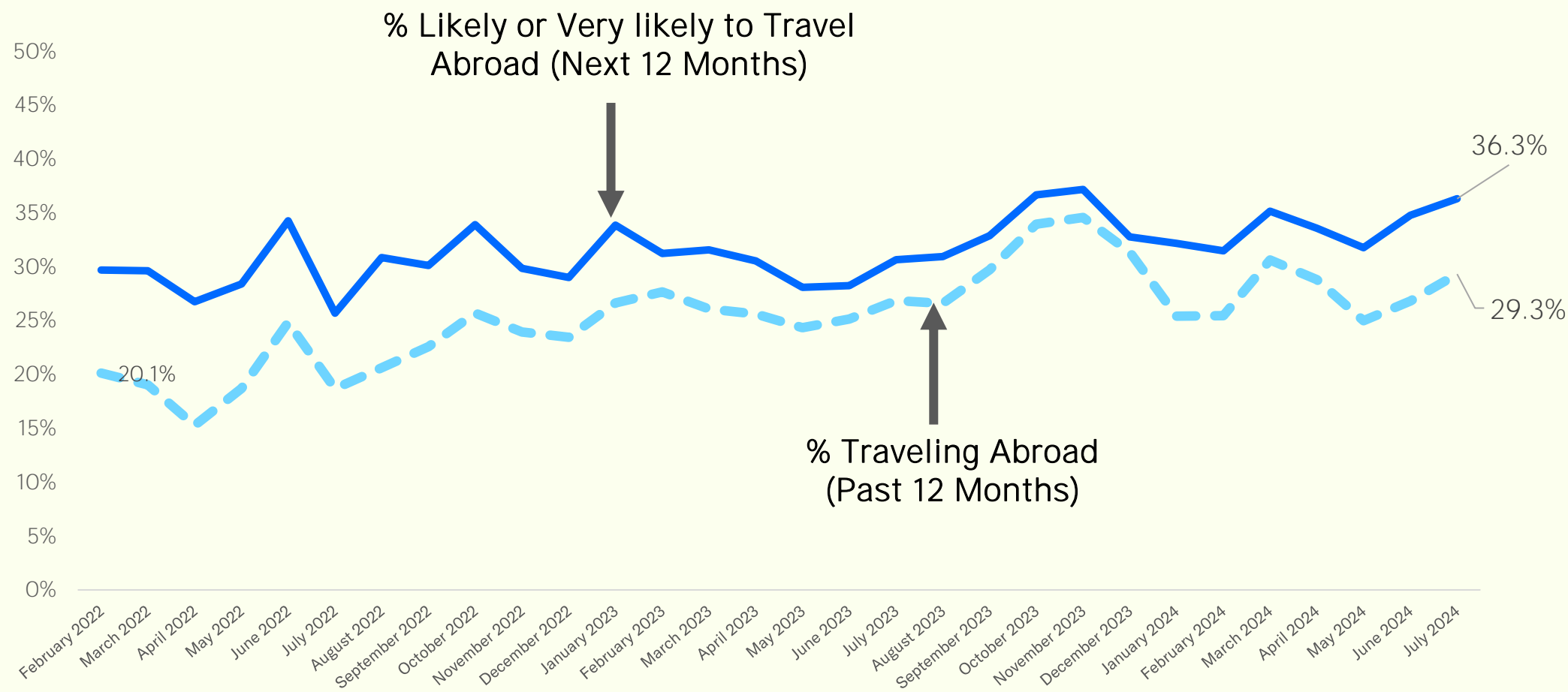
Travel Sentiment Indices

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)

Likelihood to travel abroad and actual international travel move closely together.


Current Travel Index

113.8

107.0

100

% Future Travel Index

125
120
115
110
105
100
95
90
85
80
75

January 2023
February 2023
March 2023
April 2023
May 2023
June 2023
July 2023
August 2023
September 2023
October 2023
November 2023
December 2023
January 2024
February 2024
March 2024
April 2024
May 2024
June 2024
July 2024

The State of the American Traveler livestream, August 2024

Base: All respondents, 4,004 completed surveys
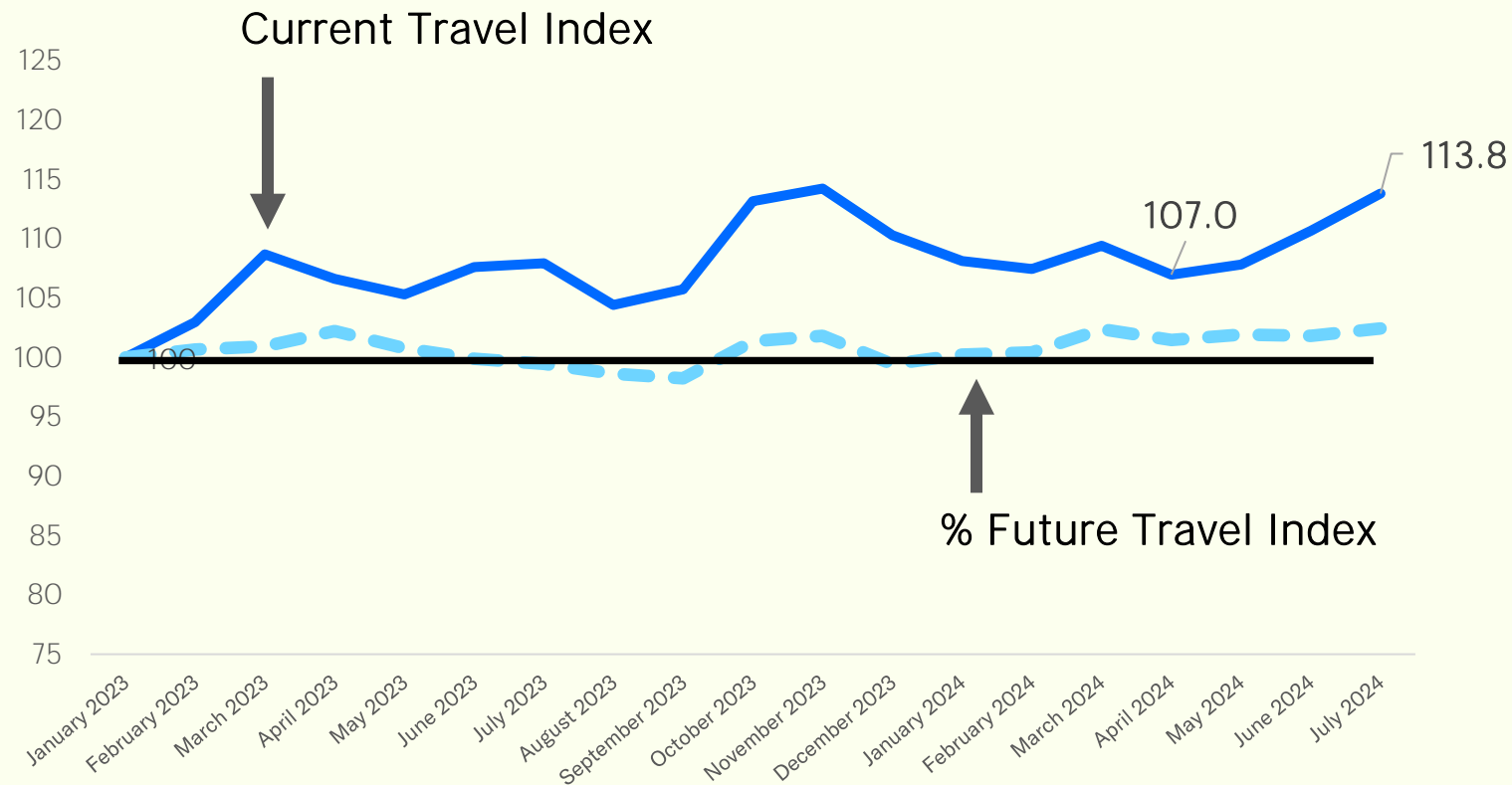
The Big Picture: Moving into the Fall travel season, American travel sentiment remains strongly positive.

Future Partners   The State of the American Traveler livestream , August 2024

Day-dreaming about travel is practically an American pastime

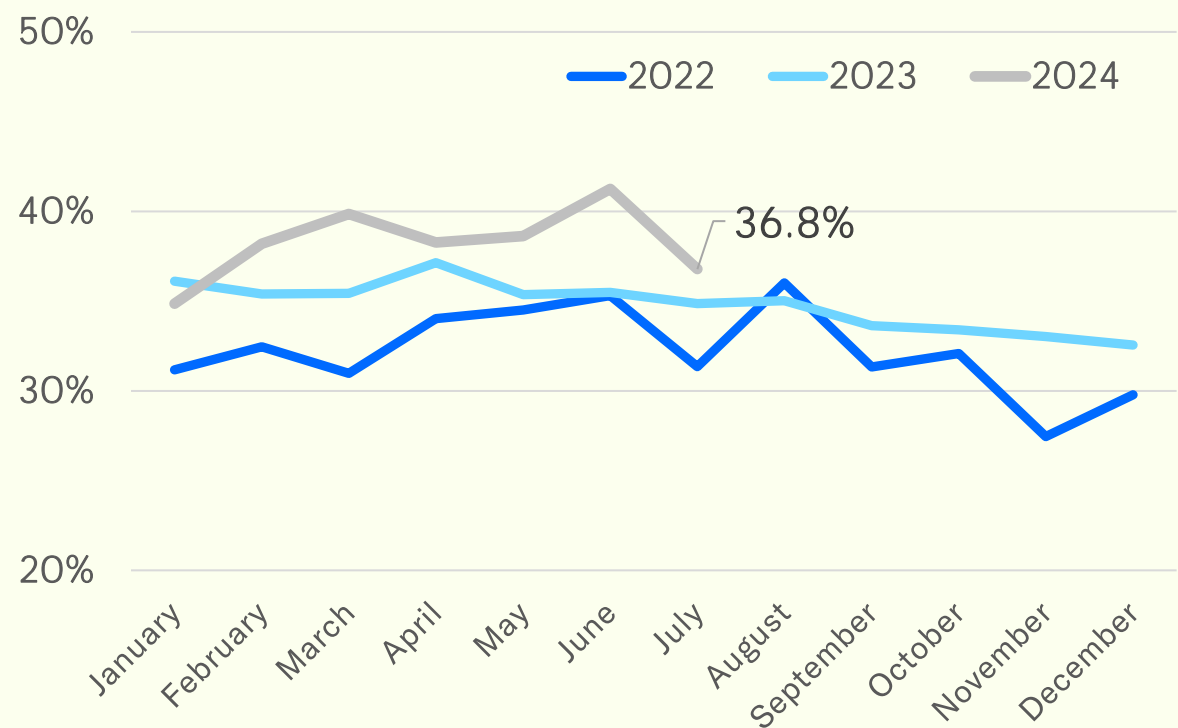## Day-dreamed about travel in the past week
(% of all American Travelers)

43.9%

Legend: 2022, 2023, 2024
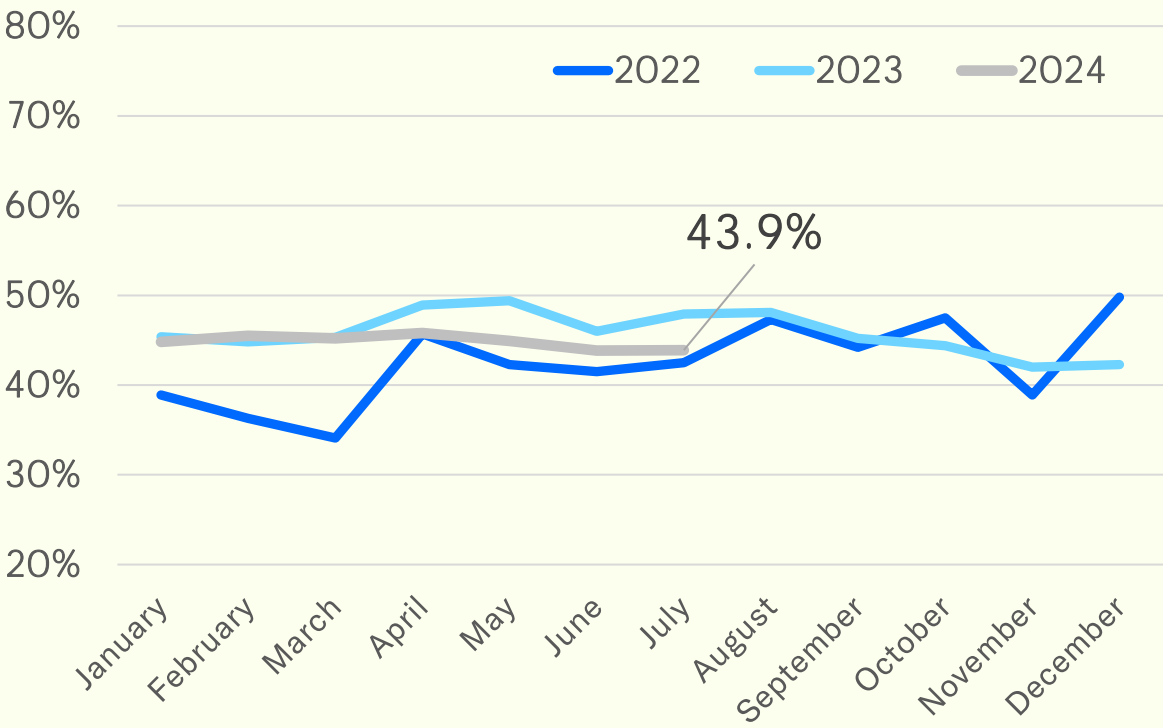
So is chatting about future trips with friends.

Talked with a friend about a future trip in the past week
(% of all American Travelers)

44.8%

Legend: 2022, 2023, 2024

X-axis: January, February, March, April, May, June, July, August, September, October, November, December

Y-axis: 20%, 30%, 40%, 50%, 60%, 70%, 80%

Future Partners   The State of the American Traveler livestream, August 2024
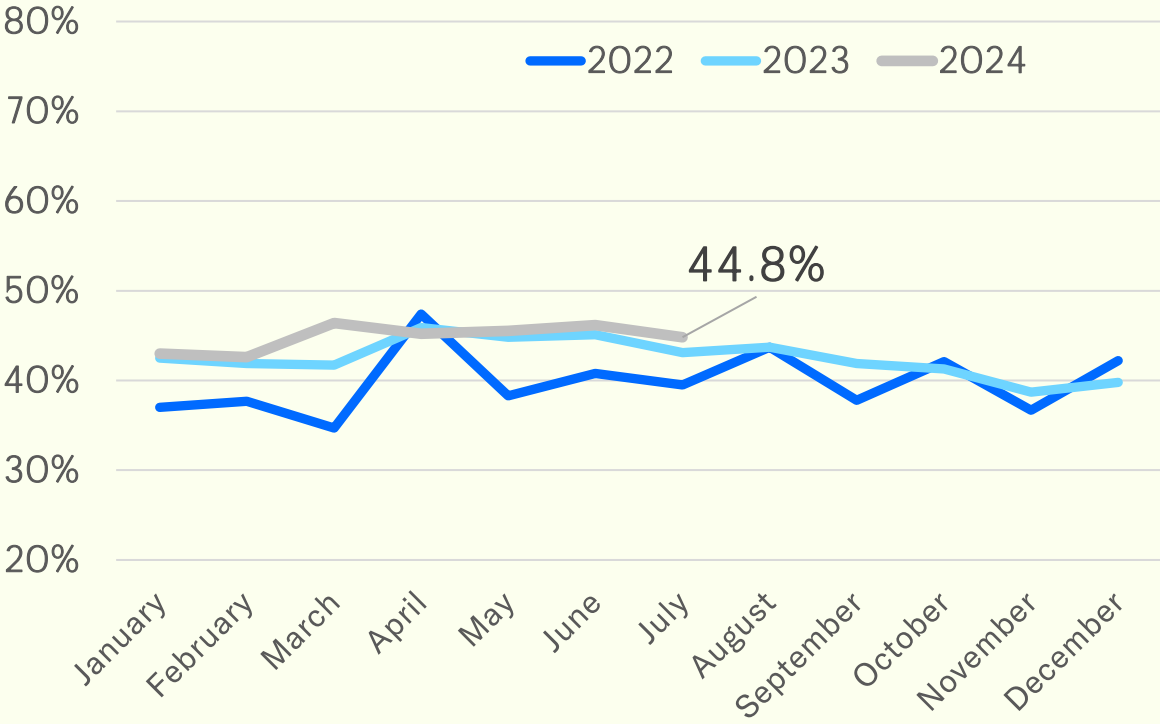
More than 1-in-3 researched travel ideas online

Researched about travel online in the past week

(% of all American Travelers)

Legend: 2022, 2023, 2024
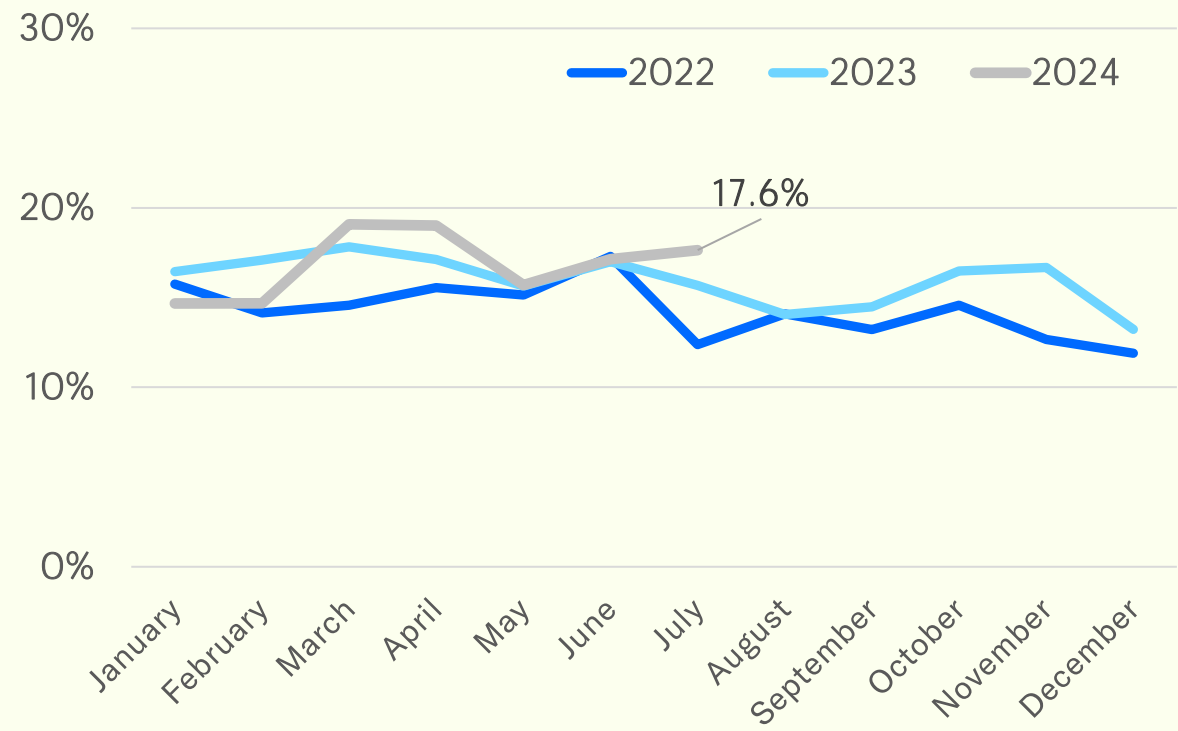
36.8%

Y-axis: 50%, 40%, 30%, 20%

X-axis: January, February, March, April, May, June, July, August, September, October, November, December

The State of the American Traveler livestream, August 2024

Over 1-in-10 researched travel ideas offline

Researched offline in the past week
(% of all American Travelers)

2022   2023   2024

12.0%

30%
20%
10%
0%

January   February   March   April   May   June   July   August   September   October   November   December

Future Partners   The State of the American Traveler livestream, August 2024
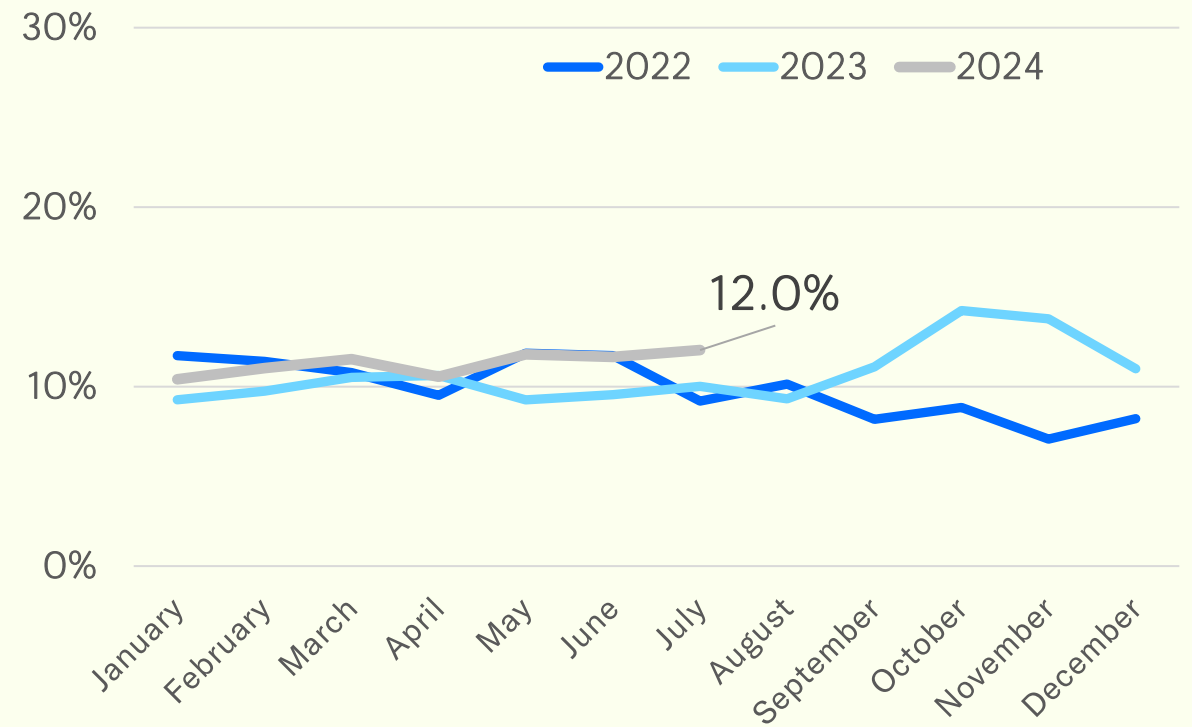
Booking is up slightly from this time last year

Made travel reservations in the past week

(% of all American Travelers)

17.6%

Legend: 2022 — 2023 — 2024

Y-axis: 0%, 10%, 20%, 30%

X-axis: January, February, March, April, May, June, July, August, September, October, November, December

Business & Group Meeting Travel

Future Partners

Overnight business travel grew last year and the proportion of travelers taking such trips is solid.

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)
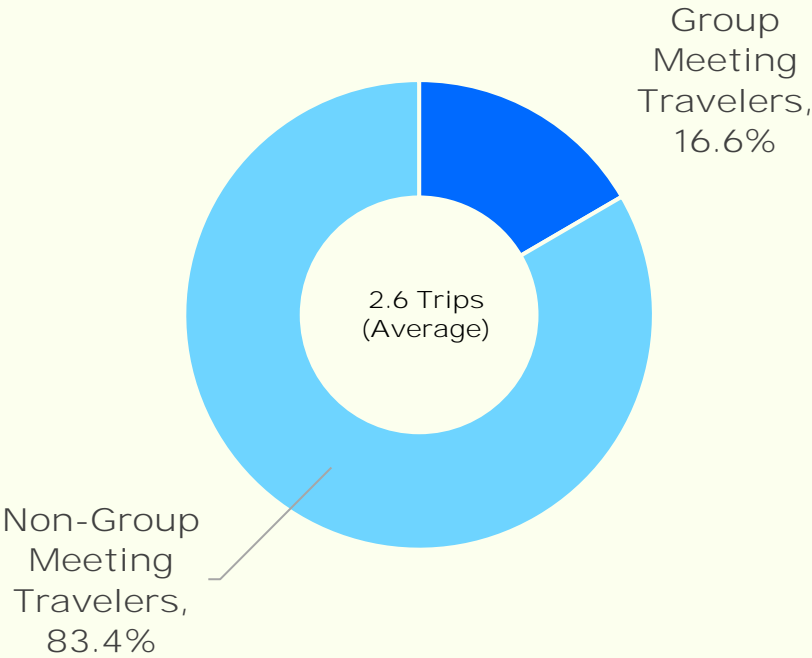
Took 1 or More Overnight Business Trips

Business Travelers, 21.8%

Non-Business Travelers, 78.2%

2.9 Trips (Average)
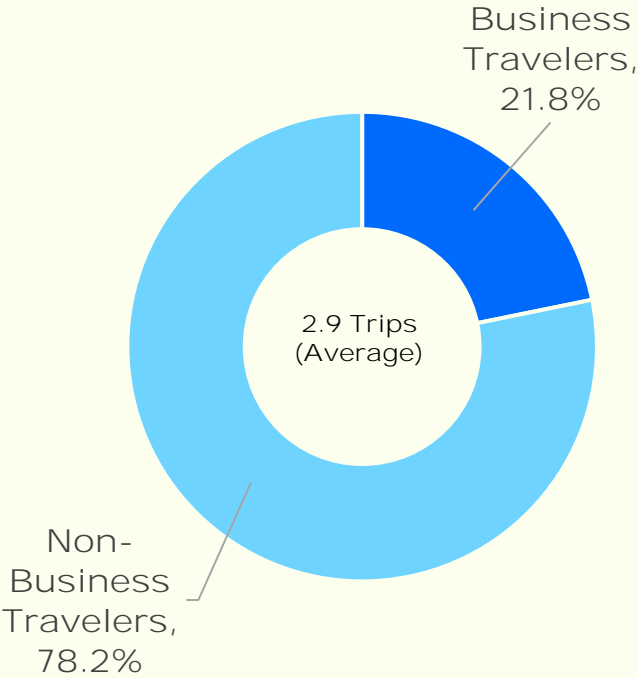
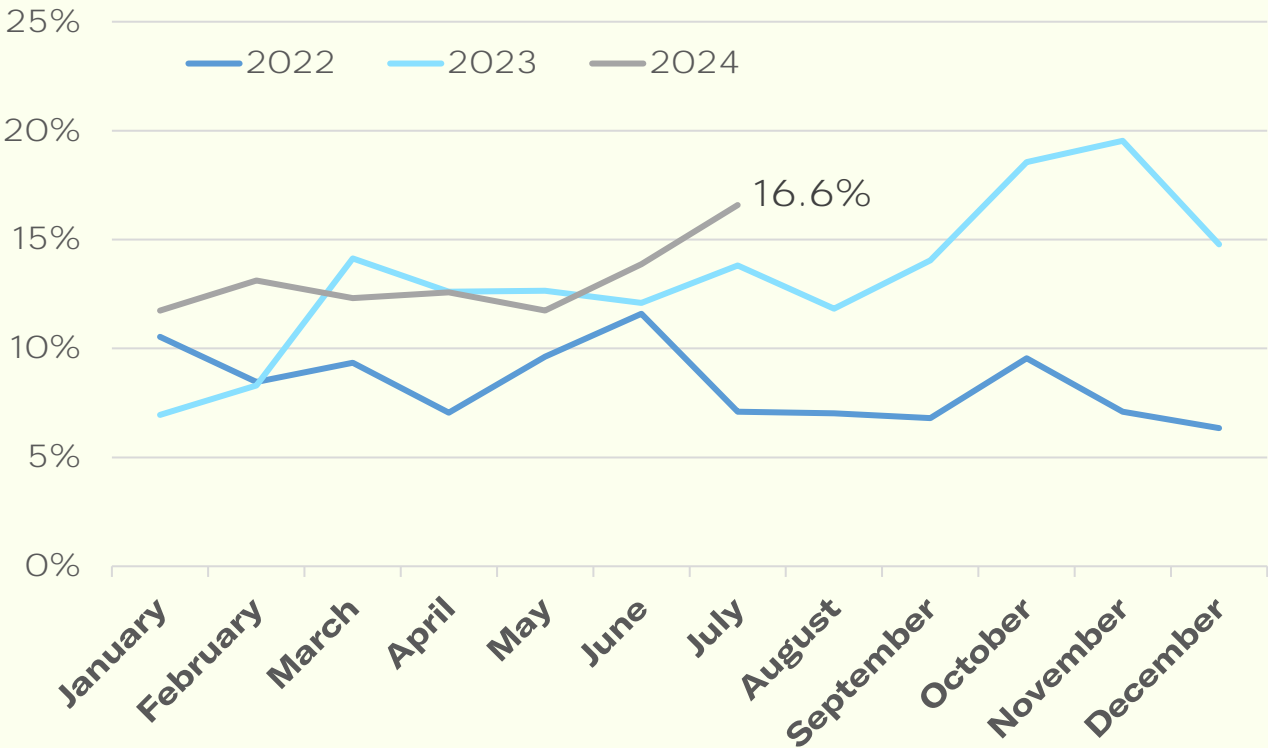### Percent of All Travelers Taking Business Trips

21.8%
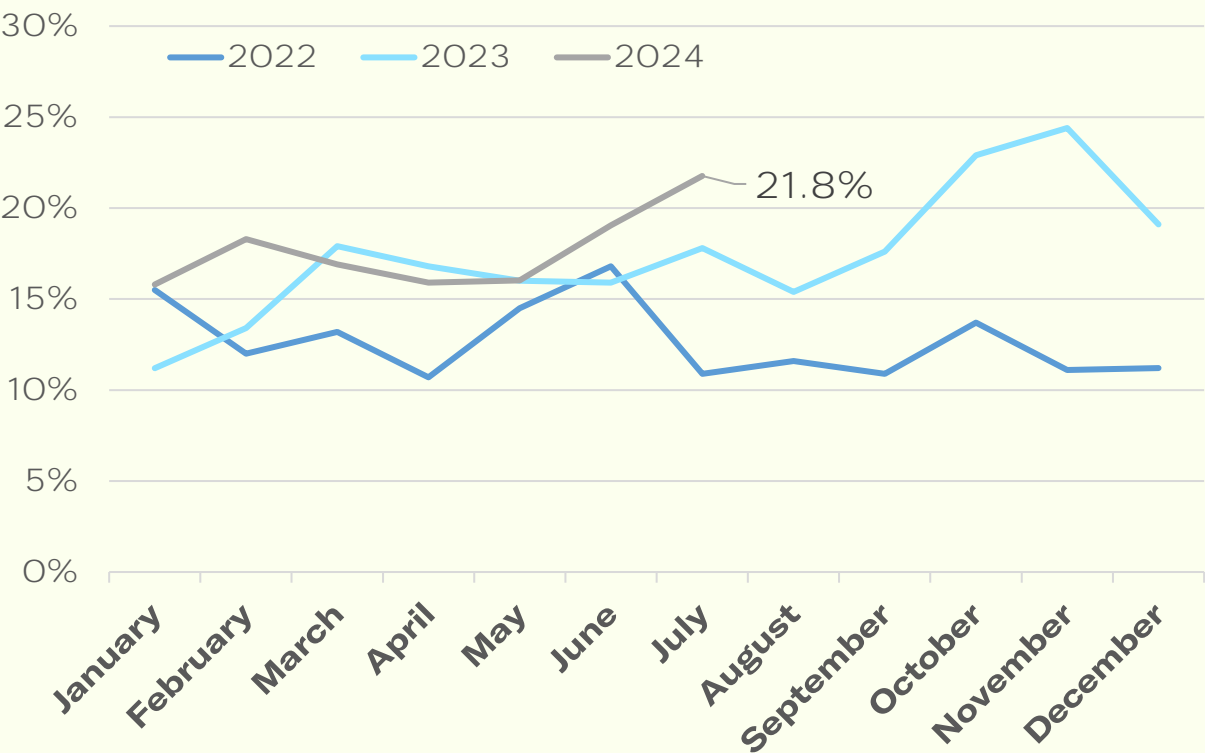
Overnight group meetings travel followed a similar pattern

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

1 or More Overnight Group Meetings Trips

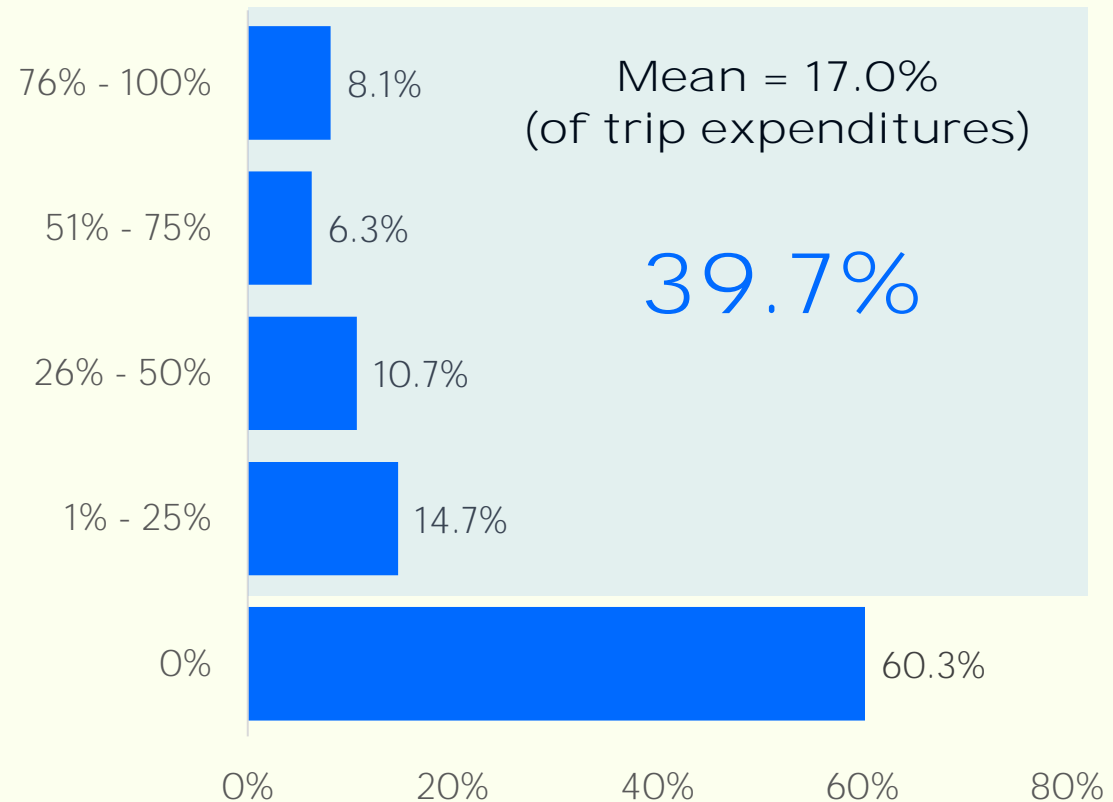Percent of All Travelers Taking Overnight Group Meetings Trips

Group Meeting Travelers, 16.6%

Non-Group Meeting Travelers, 83.4%

2.6 Trips (Average)

16.6%

2022 2023 2024

January February March April May June July August September October November December

The State of the American Traveler livestream, August 2024

Financing Travel

About 40% of travelers financed parts of their most recent overnight trip.

Question: Of the total cost of your most recent overnight trip, how much did you finance using borrowed funds (e.g., credit cards, loans, etc.)?

Mean = 17.0%
(of trip expenditures)

39.7%

Category	Percentage
76% - 100%	8.1%
51% - 75%	6.3%
26% - 50%	10.7%
1% - 25%	14.7%
0%	60.3%

Base: All respondents, 4,004 completed surveys

The proportion of trip spend financed is fairly stable across age cohorts.

Question: Of the total cost of your most recent overnight trip, how much did you finance using borrowed funds (e.g., credit cards, loans, etc.)?

By Generation

By Annual Household Income

Base: All respondents, 4,004 completed surveys
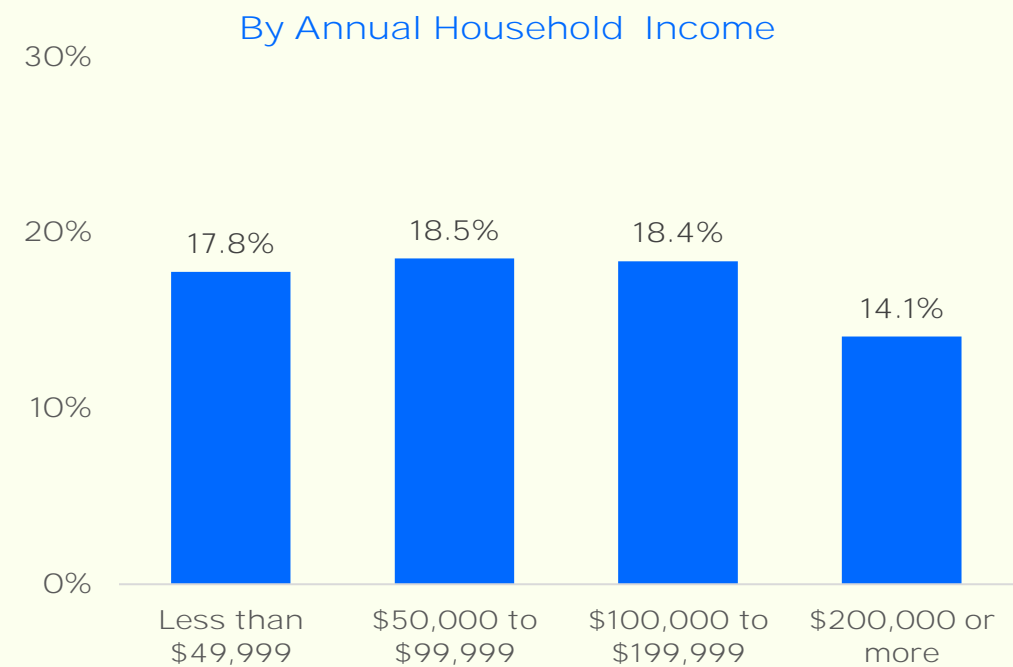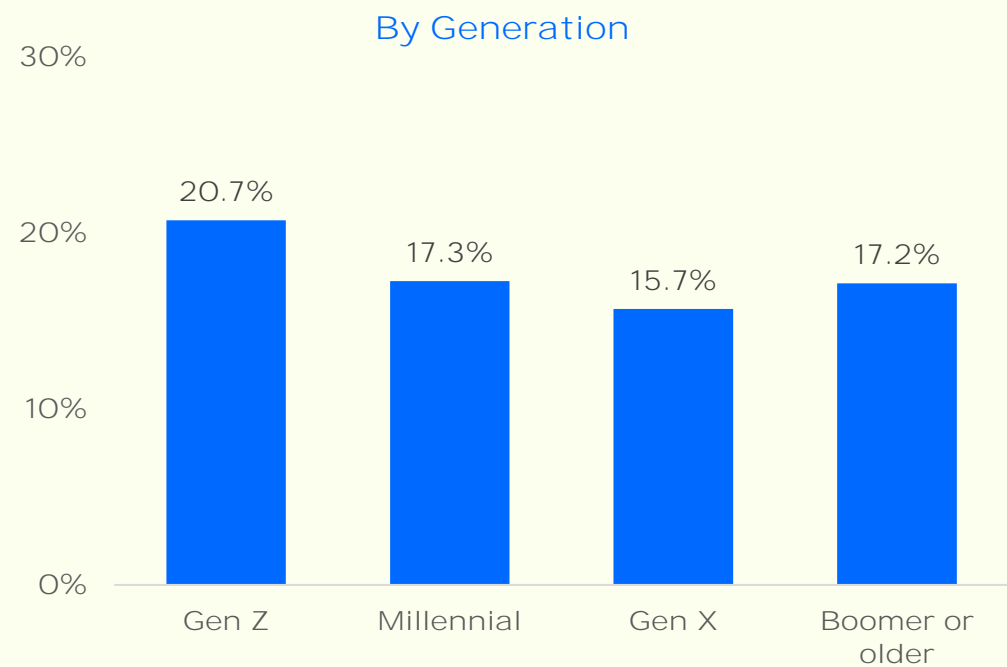
Just over half of these borrowed trip expenditures are repaid within 3 months

Question: What percentage of your borrowed trip expenses did you repay (or plan to repay) within three months?

Mean = 52.7%

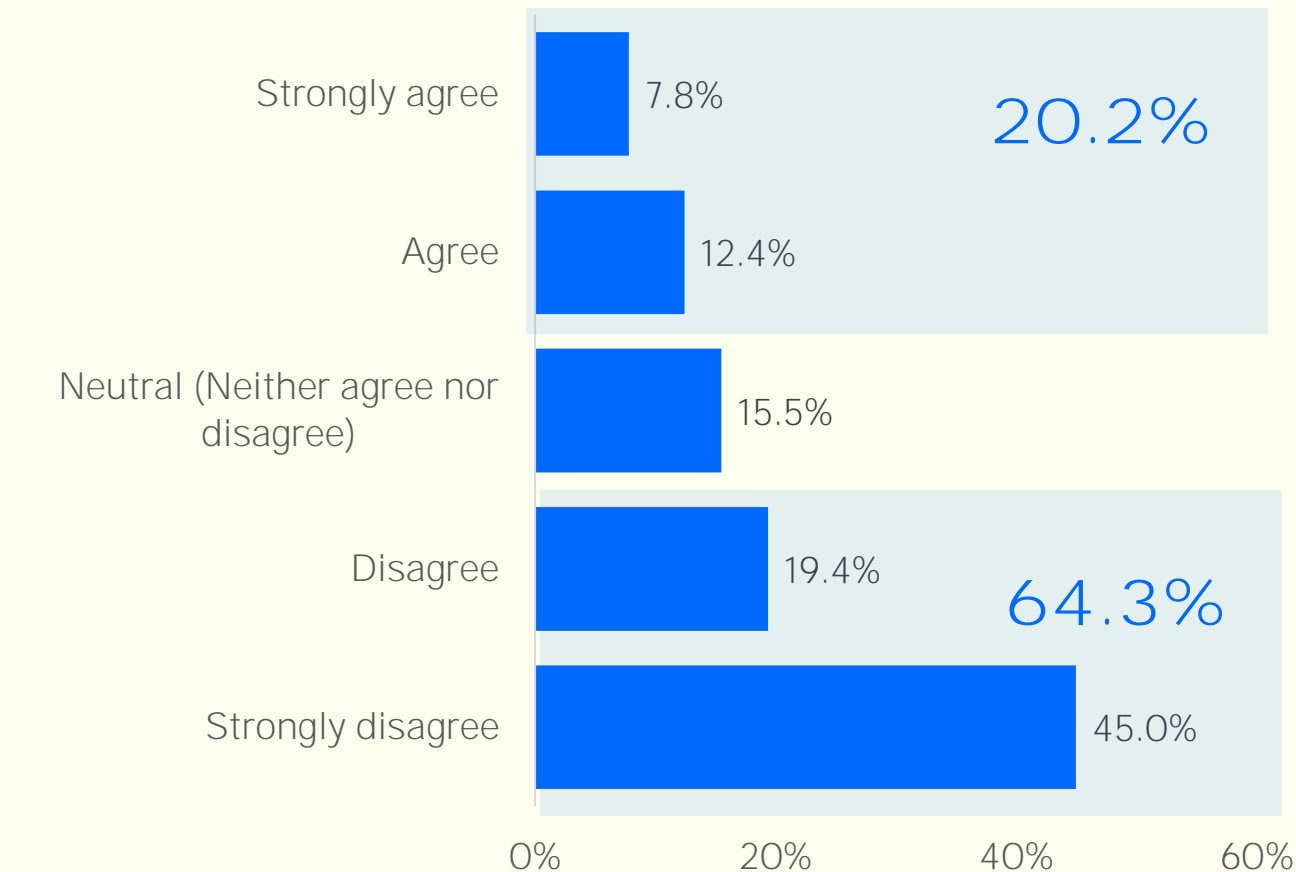| Category	Percentage
76% - 100%	39.7%
51% - 75%	11.3%
26% - 50%	20.0%
1% - 25%	23.1%
0%	5.9%
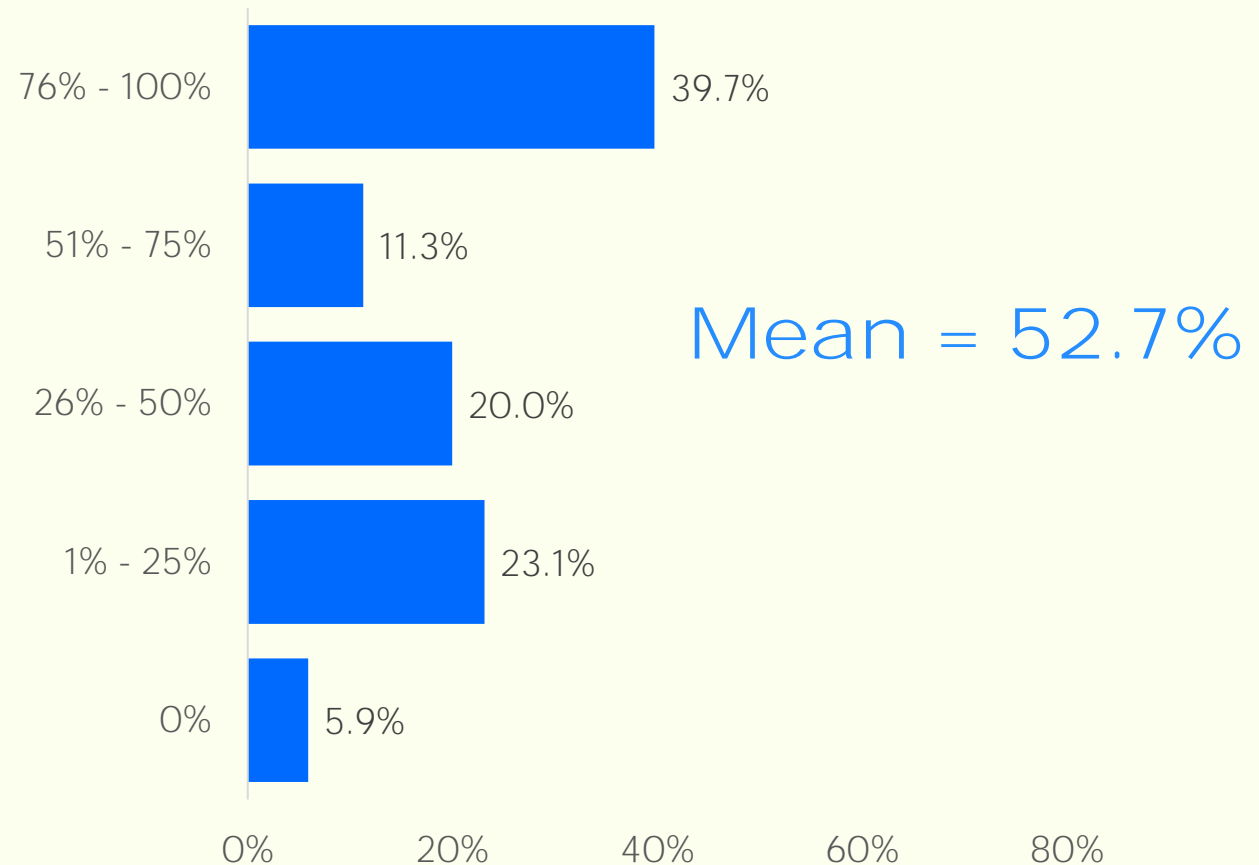
Older and more affluent travelers finance less

Question: What percentage of your borrowed trip expenses did you repay (or plan to repay) within three months?

By Generation

By Annual Household Income

Base: All respondents, 4,004 completed surveys
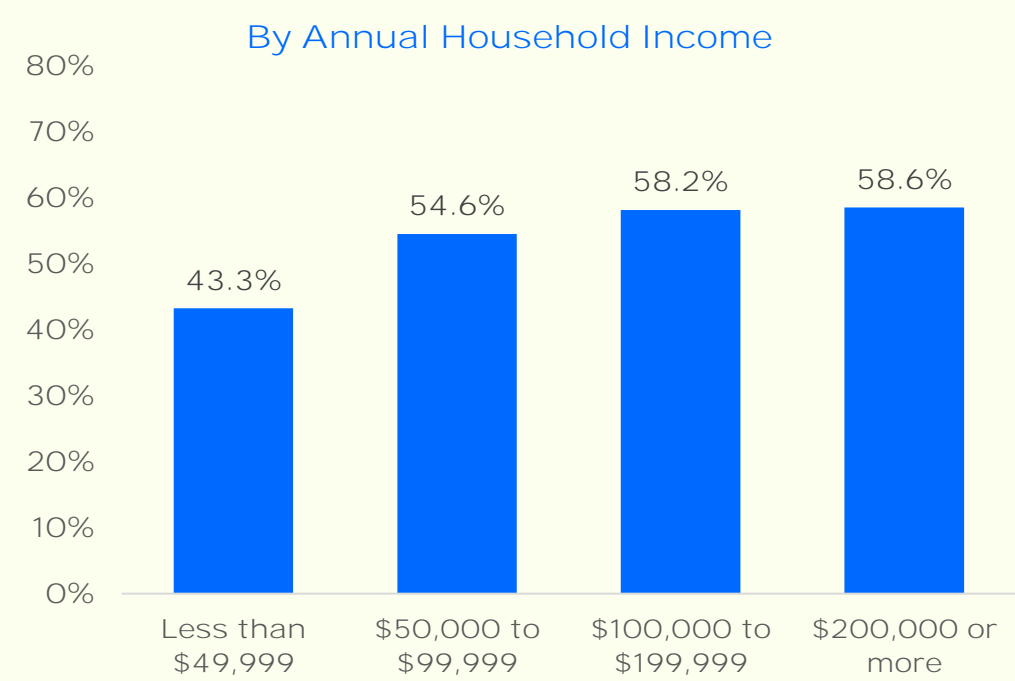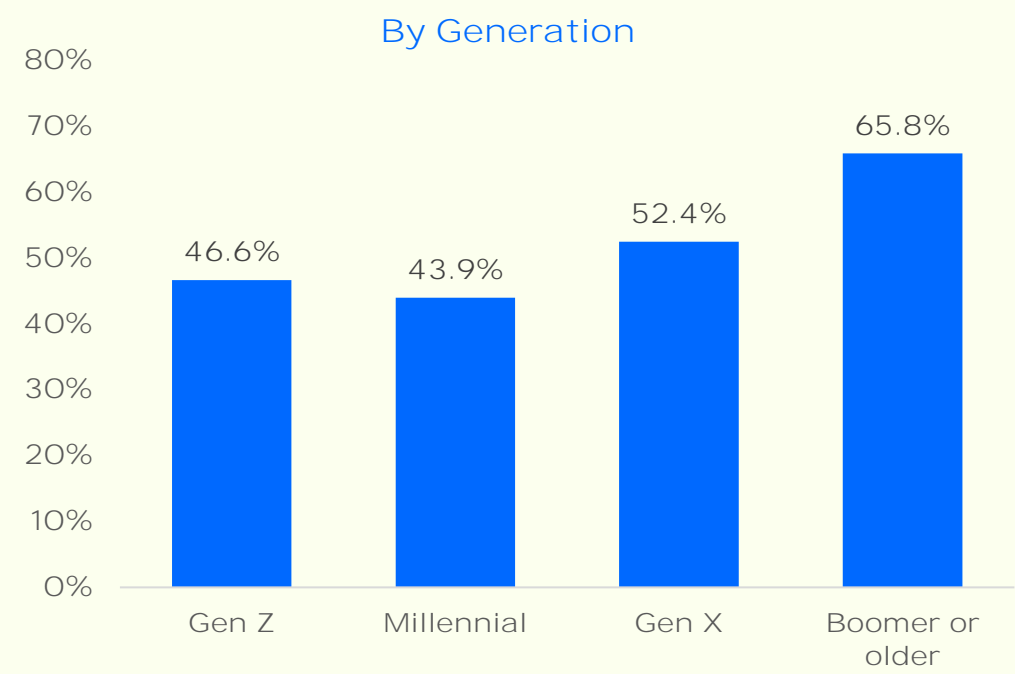
Travelers by a three to one margin feel more unlikely (than likely) to need to finance their trips.

How much do you agree or disagree with these statements:

"I usually need to borrow money that I can't pay back immediately (e.g., credit cards or loans) to finance my travels."

Strongly agree — 7.8%

Agree — 12.4%

20.2%

Neutral (Neither agree nor disagree) — 15.5%

Disagree — 19.4%

64.3%

Strongly disagree — 45.0%

0%   20%   40%   60%

Base: All respondents, 4,004 completed surveys

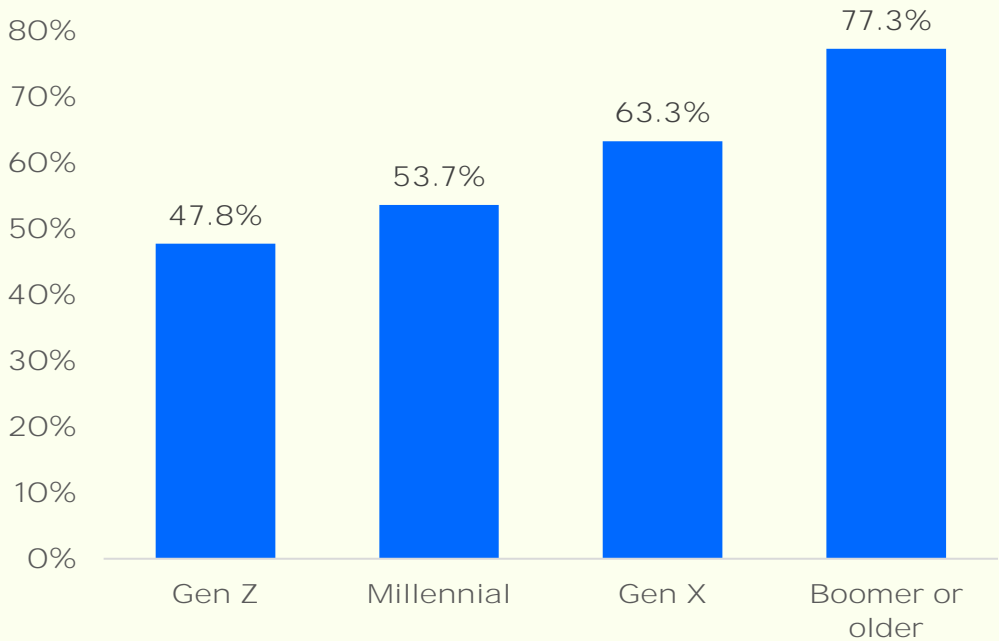# ...yet, again, younger and less affluent travelers feel this need more acttely.

Statement Agreement: "I usually need to borrow money that I can't pay back immediately (e.g., credit cards or loans) to finance my travels."

By Generation
(Disagree or Strongly disagree)

	Gen Z	Millennial	Gen X	Boomer or older
	47.8%	53.7%	63.3%	77.3%

By Income Level
(Disagree or Strongly disagree)

	Less than $49,999	$50,000 to $99,999	$100,000 to $199,999	$200,000 or more
	56.4%	62.0%	72.5%	75.3%

Base: All respondents, 4,004 completed surveys
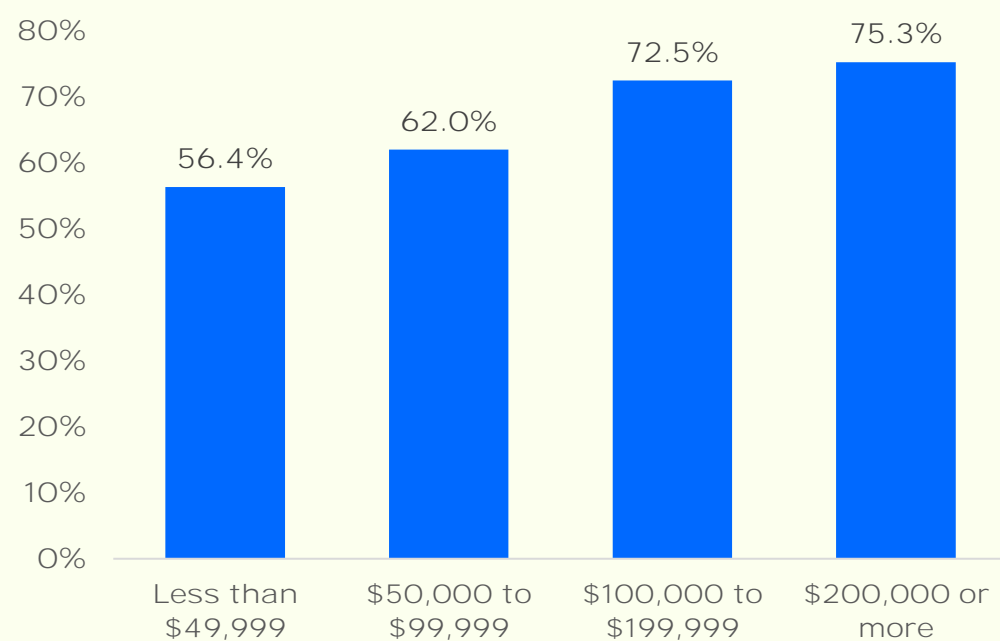
High Interest rates are definitely on travelers'
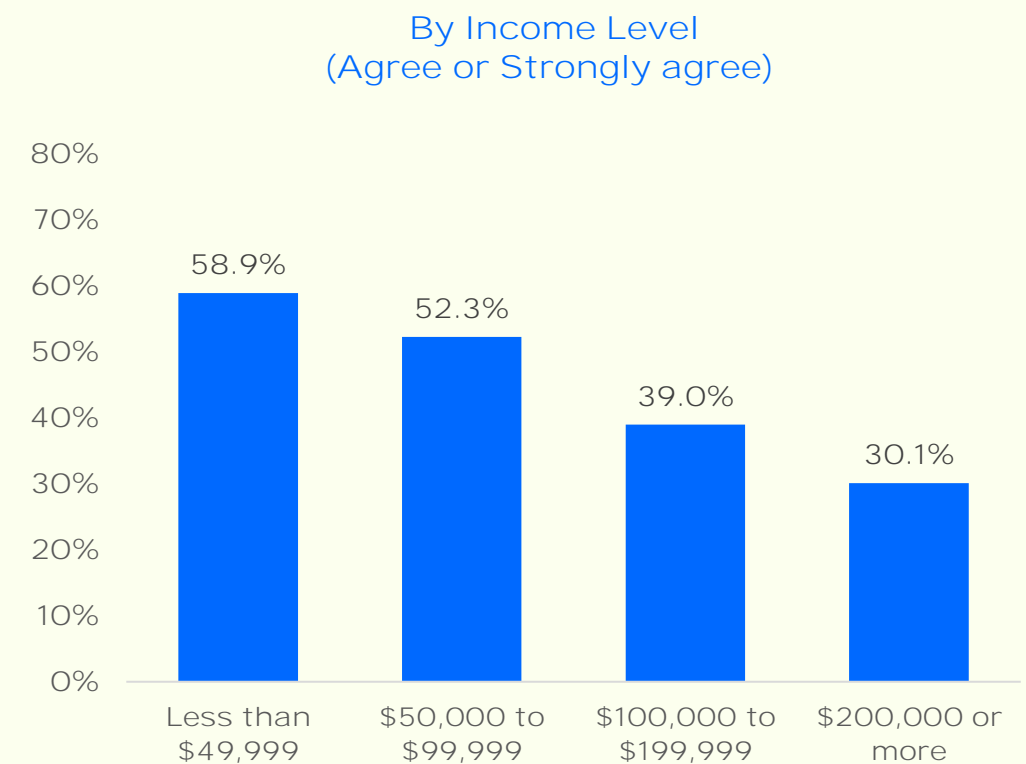## minds and impacting American travel.

How much do you agree or disagree with these statements:

"Interest rates are too high right now for me to be comfortable financing my travels."

Strongly agree — 26.8% **48.8%**

Agree — 21.9%

Neutral (Neither agree nor disagree) — 26.6%

Disagree — 10.0% **24.7%**

Strongly disagree — 14.7%

0%   20%   40%   60%
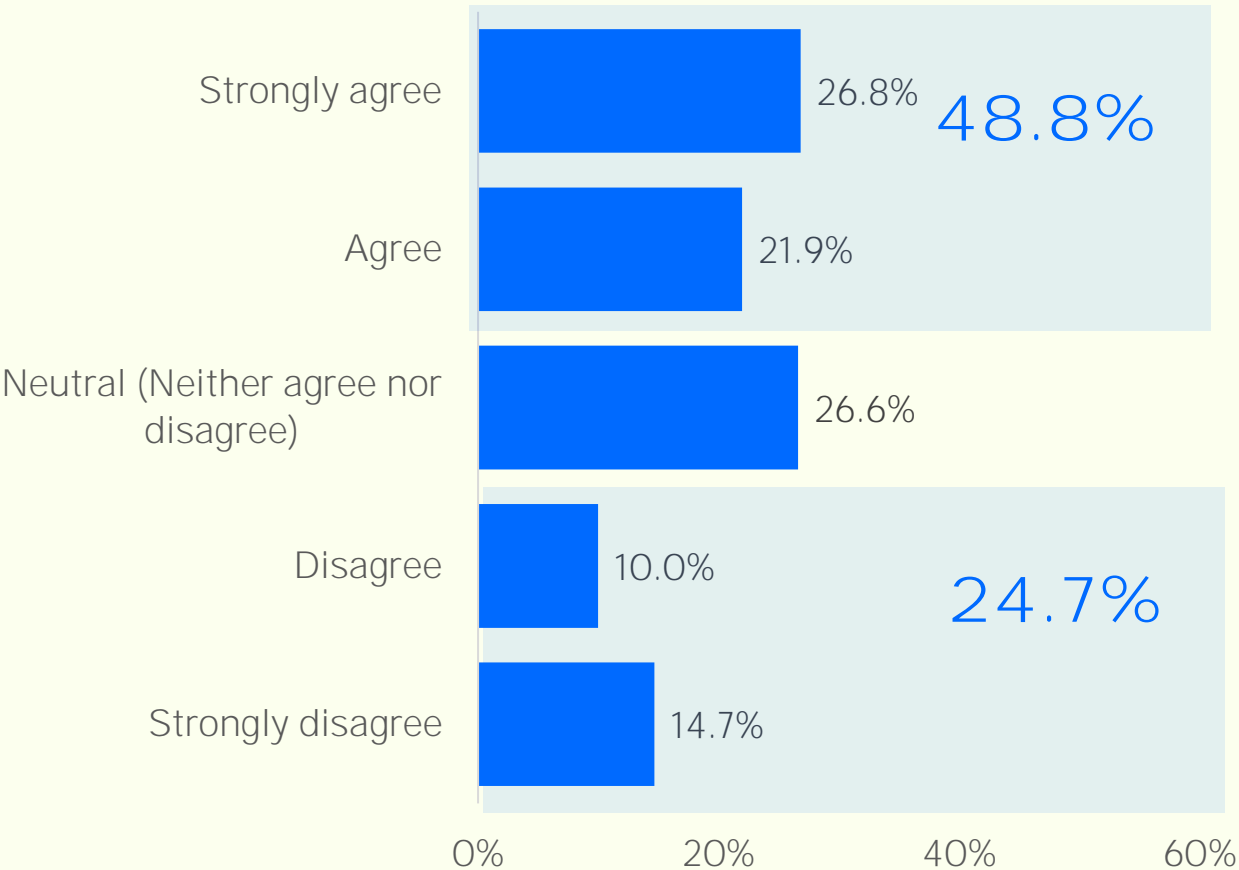
The impact is having the largest impact on the lower annual household income cohort.

Statement Agreement: "Interest rates are too high right now for me to be comfortable financing my travels."

By Generation
(Agree or Strongly agree)

Gen Z	Millennial	Gen X	Boomer or older
43.4%	53.1%	51.7%	44.0%

By Income Level
(Agree or Strongly agree)

Less than $49,999	$50,000 to $99,999	$100,000 to $199,999	$200,000 or more
58.9%	52.3%	39.0%	30.1%
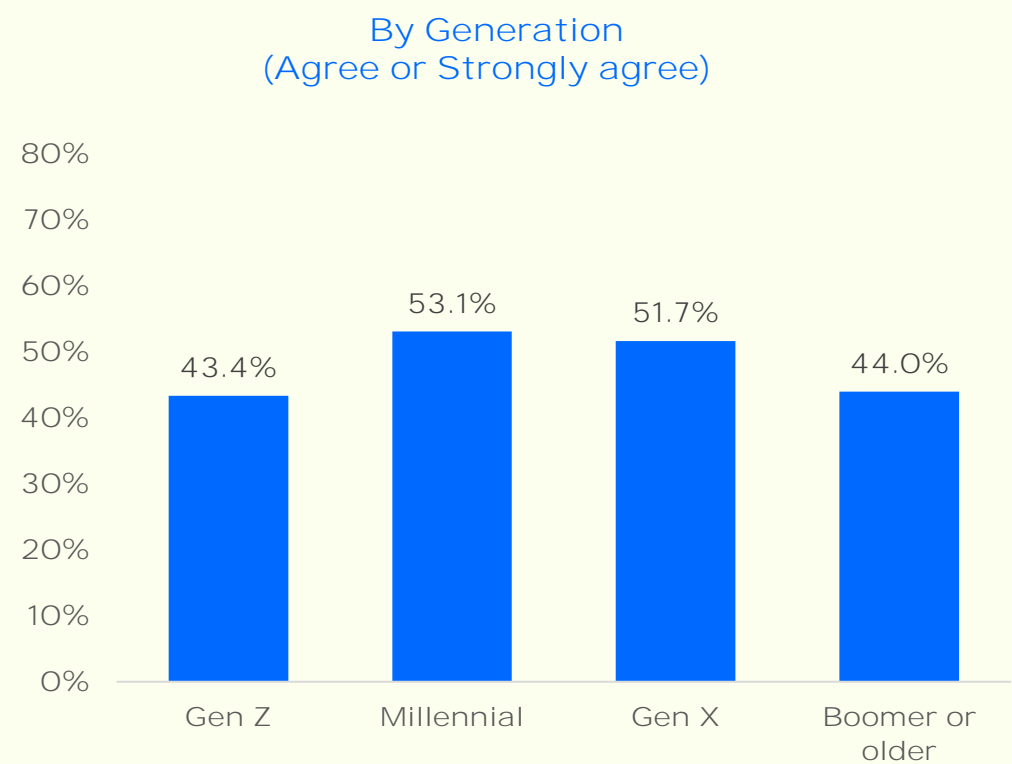
Our Research Services

Visitor & Target Audience Profiles

Audience Persona Identification

Visitor Activity Analysis & Segmentation

Brand Performance

Resident + Stakeholder Research

Advertising Testing & ROI

Hotel & Attractions Research

September Livestream
Registration

Future Partners

Passion Profiles

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Passion Profiles

- Agri-tourism
- Art museums
- Asian pop culture (Anime, Manga, K-Pop, etc.)
- Attending college sports
- Attending professional sports
- Bars, nightclubs
- Birdwatching - Birding
- Camping
- Canoeing, kayaking or rafting
- Craft beers
- Crafting, DIY or creative projects
- Enjoying theme or amusement parks
- Fashion
- Fishing (Freshwater)
- Fishing (Saltwater or deep sea)
- Fitness, health and wellness
- Food and cuisine
- Gaming or gambling
- Geocaching
- Golf
- Hiking (day hikes)

- Hiking (over-night on trail, longer haul)
- Hunting (Big game)
- Hunting (Birds, small game)
- International travel (taking trips outside the USA)
- Marijuana or cannabis-related products
- Motorcycle touring
- Mountain biking (off road or gravel)
- Music festivals (multi-day events)
- Musical concerts (classical, symphonies, etc.)
- Musical concerts (pop, rock, hip hop, alternative, modern, etc.)
- Photography
- Recreational vehicle travel
- Sailing or boating
- Shopping
- Skiing or snowboarding
- Theater or plays, (on- or off-Broadway productions)
- Vegan foods & lifestyle
- Video games - Video gaming
- Visiting historical sites and attractions
- Voluntourism activities (Volunteering while traveling)
- Wine

Future Partners

Passion Profiles

Scan to learn more

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AI as an Earned Channel

American travelers' evaluation of AI-based tools like ChatGPT for travel inspiration

Paid Media	Owned Media	Earned Media
Any form of media where **you pay to promote** your content, products or services.	Channels and content that **you control and manage** directly.	The **exposure and publicity gained organically** through word-of-mouth, reviews, mentions, and shares from others.
Examples: Paid search ads (e.g., Google Ads) social media ads, display ads, and sponsored content.	Examples: Company websites, blogs, email newsletters, mobile apps, and social media profiles.	Examples: Media coverage, social media mentions, online reviews, and customer testimonials.

How to Evaluate AI-based tools for travel planning and inspiration?

- **Who is the audience?** –
  Tracking of current AI users and travel planners in *The State of the American Traveler*

- **Perceptions of AI as a research tool** –
  Series of in-depth interviews with travelers on AI use and travel

Proportion of American Travelers Using These Channels for Travel Planning & Inspiration

TikTok
Travelers

12.9%

Other
Social

47.8%

**AI
Travelers**

11.3%

Other Online
Content

67.8%

Print/
Offline

37.7%

Future Partners   AI as an Earned Channel

Generation & Age

Legend: Gen Z | Millennial | Gen X | Boomers

American Travelers
- Gen Z: 10.3%
- Millennial: 30.0%
- Gen X: 28.0%
- Boomers: 31.7%

AI Travelers
- Gen Z: 14.0%
- Millennial: 60.6%
- Gen X: 19.6%
- Boomers: 5.8%

TikTok Travelers
- Gen Z: 27.7%
- Millennial: 46.9%
- Gen X: 21.1%
- Boomers: 4.3%

Other Social
- Gen Z: 14.2%
- Millennial: 42.6%
- Gen X: 27.7%
- Boomers: 15.5%

Other Online Content
- Gen Z: 8.5%
- Millennial: 30.2%
- Gen X: 28.5%
- Boomers: 32.8%

Print/Offline
- Gen Z: 5.2%
- Millennial: 24.6%
- Gen X: 25.7%
- Boomers: 44.5%

	American Travelers	AI Travelers	TikTok Travelers	Other Social	Other Online Content	Print/Offline
Average Age	47.9	37.6	35.4	41.9	48.6	52.6

Annual Household Income

Bar chart: Annual Household Income

- American Travelers: $86,219
- AI Travelers: $120,088
- TikTok Travelers: $90,604
- Other Social: $91,324
- Other Online Content: $90,338
- Print/Offline: $96,499

Y-axis: $0, $20,000, $40,000, $60,000, $80,000, $100,000, $120,000, $140,000

Future Partners   AI as an Earned Channel

Ethnicity – Percent BIPOC/Non-Caucasian

Bar chart showing percent BIPOC/Non-Caucasian by traveler group:
- American Travelers: 23.3%
- AI Travelers: 24.9%
- TikTok Travelers: 32.3%
- Other Social: 26.3%
- Other Online Content: 22.0%
- Print/Offline: 17.7%

Maximum Leisure Travel Budget in the Next 12 Months

Bar chart showing maximum leisure travel budget by traveler segment:
- American Travelers: $4,245
- AI Travelers: $5,262
- TikTok Travelers: $4,270
- Other Social: $4,348
- Other Online Content: $4,702
- Print/Offline: $5,737

"I expect to travel more for leisure."

29.5%	60.8%	44.0%	39.0%	32.6%	35.7%
American Travelers	AI Travelers	TikTok Travelers	Other Social	Other Online Content	Print/Offline

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"I expect to spend more for leisure."

Bar chart showing percentages by traveler segment:
- American Travelers: 32.1%
- AI Travelers: 57.9%
- TikTok Travelers: 40.8%
- Other Social: 39.1%
- Other Online Content: 35.7%
- Print/Offline: 40.8%

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"Now is a good time to spend money on travel."

	American Travelers	AI Travelers	TikTok Travelers	Other Social	Other Online Content	Print/Offline
	32.2%	72.7%	41.8%	40.5%	35.6%	40.5%

Future Partners   AI as an Earned Channel

General Travel Motivations

Legend: ■ Total ■ AI Travelers

Motivation	Total	AI Travelers
Visit friends and/or relatives	51.9%	40.9%
Relaxation	43.2%	43.0%
Escape the stress of my daily life	32.0%	32.3%
Self-Care (Enhancing my well-being/happiness)	21.3%	29.3%
Exploration (desire to see or experience new places)	17.0%	26.9%
Enjoy nature/spend time in The Great Outdoors	18.3%	28.9%
Experience the culture of a place(s)	14.1%	27.7%
Romance/intimacy with my spouse or partner	14.8%	20.6%
Experiences for my children	10.9%	21.1%
Serendipity - Enjoy the magic of unexpected experiences	9.5%	17.4%
Education or personal growth	7.0%	19.0%
Bragging rights (Social benefits of being seen as well-traveled)	4.9%	15.0%

Travel Deterrents

Legend: ■ Total ■ AI Travelers

Deterrent	Total	AI Travelers
Travel is too expensive right now	36.3%	29.4%
Personal financial reasons	35.1%	27.0%
Gasoline was too expensive	27.3%	21.9%
Airfare was too expensive	24.2%	21.4%
I'm too busy at work	19.8%	17.4%
Not enough PTO/vacation time	13.6%	13.0%
Crowds - too many people traveling	12.3%	17.2%
Weather	10.4%	17.4%
Safety concerns (other non-COVID related)	9.8%	19.3%
Health/Illness	9.7%	8.8%
The possibility of flight cancellations	9.3%	24.3%
The pandemic is not 100% over	6.5%	5.4%
Lack of availability (at hotels, golf courses, spas, etc.)	4.0%	8.7%
Sold out/No reservations available	3.6%	8.9%

Who is the Audience for AI as an Earned Channel?

Proportion of American Travelers who Rely on AI for Travel Planning & Inspiration

11.3%

1. 60.6% Millennial, averaging 37.6 years old

2. Average HHI of $120,088

3. 24.9% BIPOC/Non-Caucasian

4. They have the second highest travel budget, second to print/offline users.

5. 60.8% expect to travel more and 57.9% expect to spend more for leisure in the next 12 months.

6. 72.7% say it is a good time to spend money on travel.

7. They are driven by a broader range of motivations compared to the average American traveler.

8. They are less discouraged by cost but more influenced by factors such as crowds, weather conditions, safety concerns, and the risk of flight cancellations.

The Potential for AI in Travel Planning & Inspiration

According to American Travelers

"What are your initial feelings on AI?"

" **I'm intrigued.** It's able to process so much information so fast and it astonishes me every time. "

" My feelings are complex: **it's fascinating and helpful but also a little creepy.** "

"What are your initial feelings on AI?"

" **"Generally speaking, it's a very powerful tool, I've used** [it] in the past for lots of different things including building itineraries and researching attractions. I find it very efficient**."** "

Real Questions Travelers Asked:

- What are the best months to visit?

- Is [Destination] good to visit this time of year?

- Do you recommend driving or flying?

- Do you think there is a city in [State] that can be used as a hub?

- What is a good boutique hotel nearby this restaurant that fits my budget and is LGBTQ friendly?
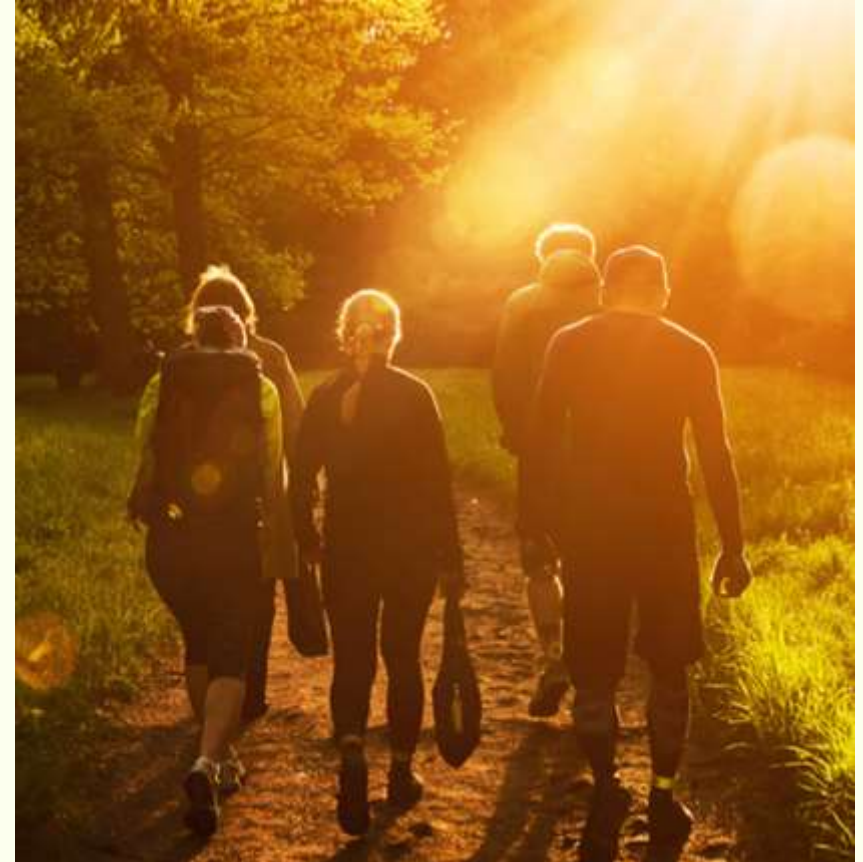
Real Questions Travelers Asked:

- Which city is preferred by music lovers, Austin or San Antonio?

- What is the most beautiful sight to see in San Francisco?

- What are unique things to do in Tampa in three **days that I haven't done before?**

- What are some other options?

- What is the best place to visit in Puerto Rico when going for the first time and I only have 5 days?
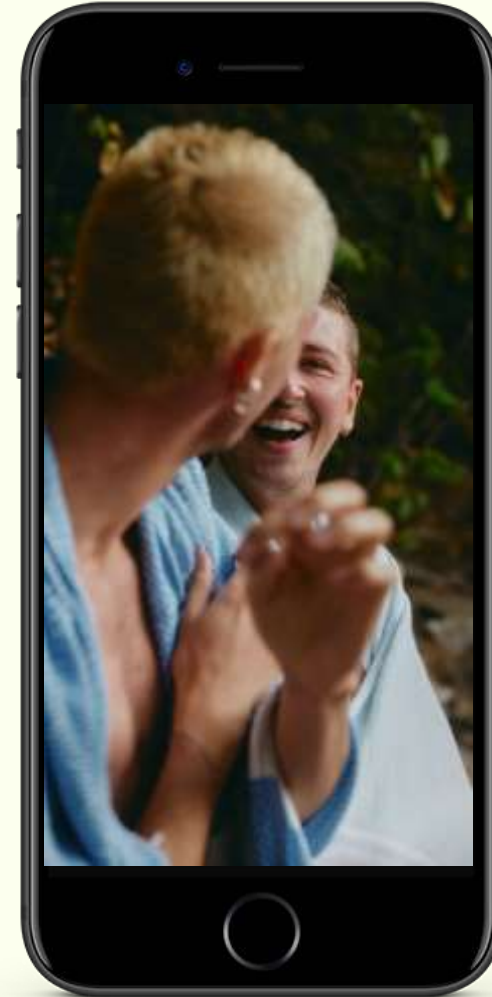
How does ChatGPT compare to search?

> **"Search engines have become so difficult to use, it's an aggregator** powered by capitalism.
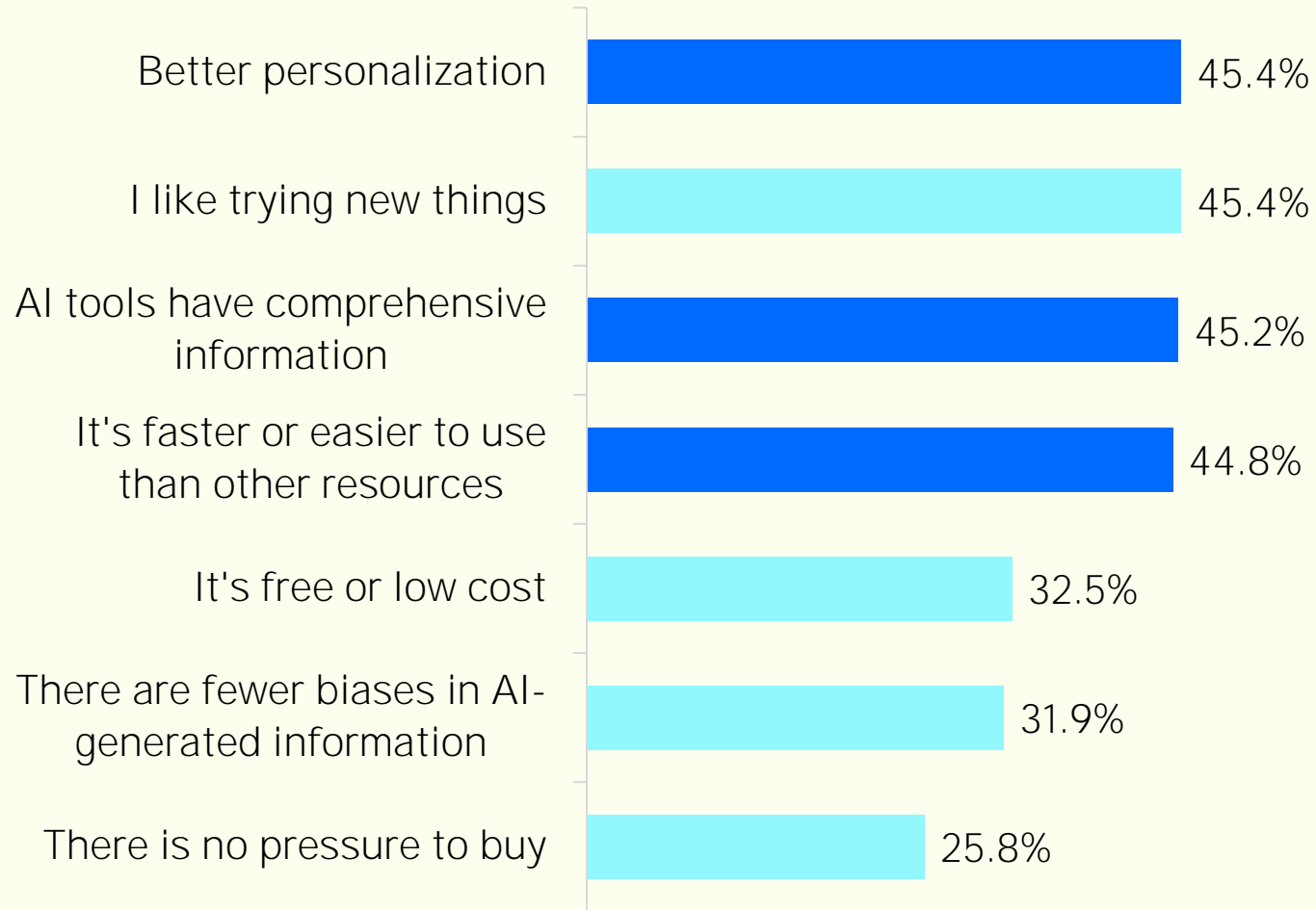>
> This was more of a conversation and feels more unbiased, natural and fluid.
>
> I might turn my process around and start here with AI and then search **after."**

Top Reasons Travelers Use AI Travel Planning

Better personalization — 45.4%

I like trying new things — 45.4%

AI tools have comprehensive information — 45.2%

It's faster or easier to use than other resources — 44.8%

It's free or low cost — 32.5%

There are fewer biases in AI-generated information — 31.9%

There is no pressure to buy — 25.8%

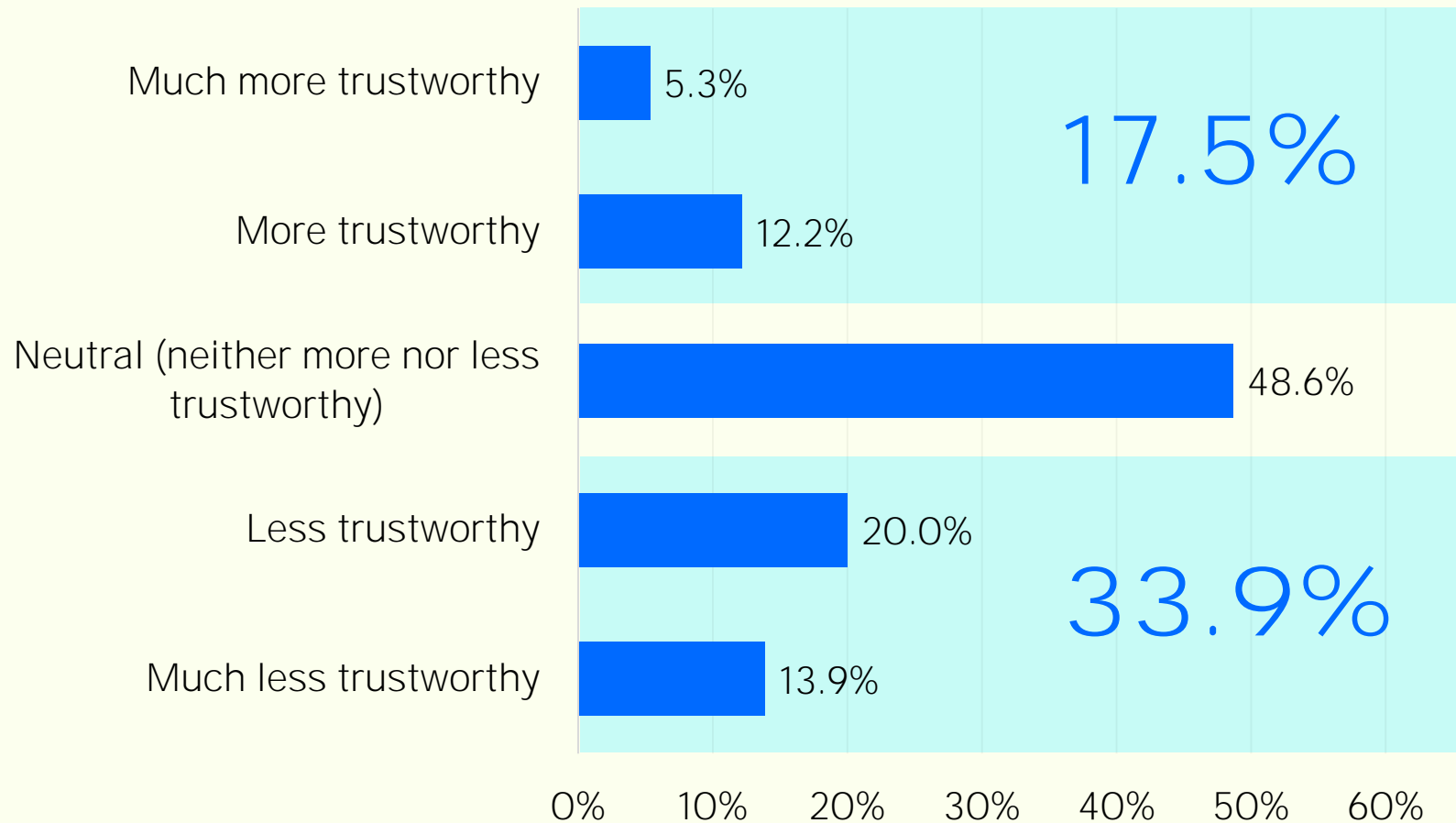**Future Partners**   AI as an Earned Channel

Question Setup:

Content generated by artificial intelligence (AI) is rapidly becoming more common. Online publishers, search engines and social media websites are beginning to label AI-generated content as such. If you encountered travel-related content labeled "Generated by AI" or "Made by Artificial Intelligence," would you generally find the content more or less trustworthy?

Labeling Travel Content AI Won't
Necessarily Promote Trust

Much more trustworthy — 5.3%

More trustworthy — 12.2%

17.5%

Neutral (neither more nor less trustworthy) — 48.6%

Less trustworthy — 20.0%

33.9%

Much less trustworthy — 13.9%

0%   10%   20%   30%   40%   50%   60%

Different Types of AI-generated Content Share Similar Levels of Trust Issues

■ Top 2-box (More or much more trustworthy)   ■ Bottom 2-box (less or much less trustworthy)
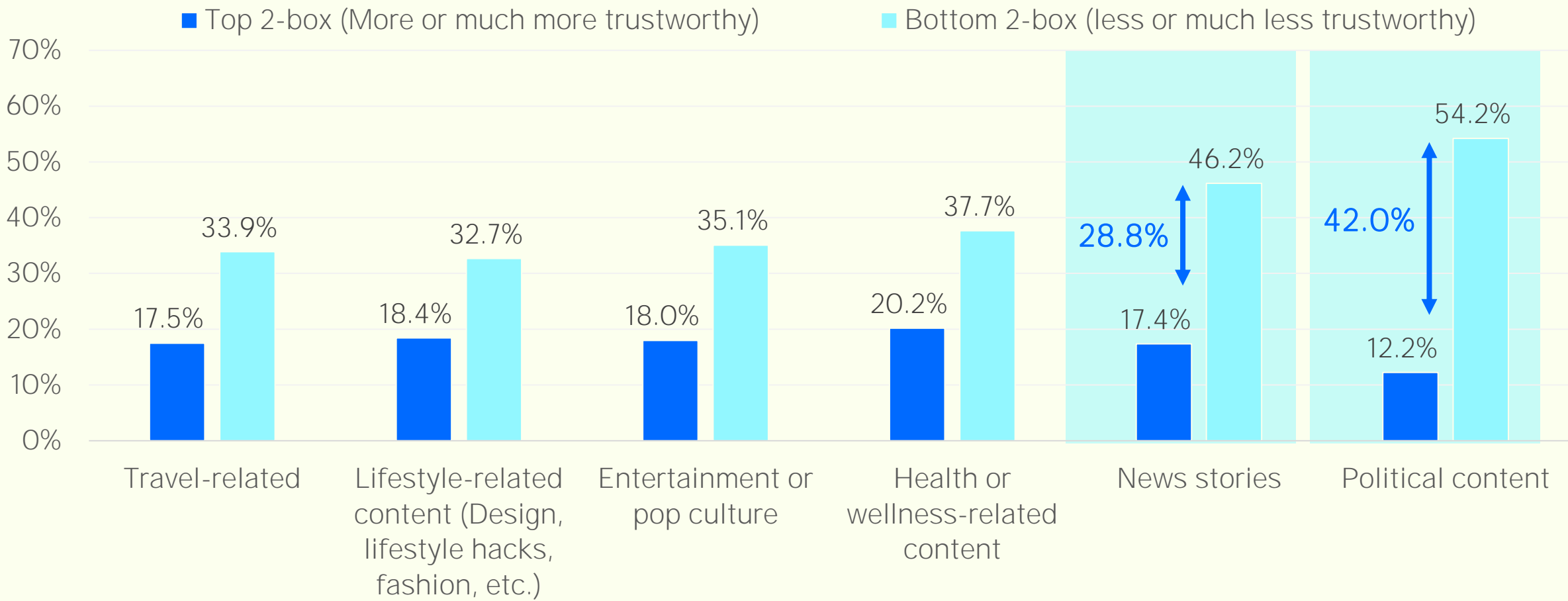
Perceptions of AI as a Research Tool

1. More straightforward and effective than traditional approaches

2. Viewed as offering impartial information

3. Enhanced ability to personalize results

4. Engaging due to its conversational style

5. Prediction: AI tools will complement, not replace, DMO content, serving as a new pathway to access it

Thank You!

September Livestream Registration