

The State of the American Traveler

A man with a grey beard and a red beanie is looking out over a city at night. The city lights are blurred in the background, and the man is wearing a brown jacket over a white shirt.

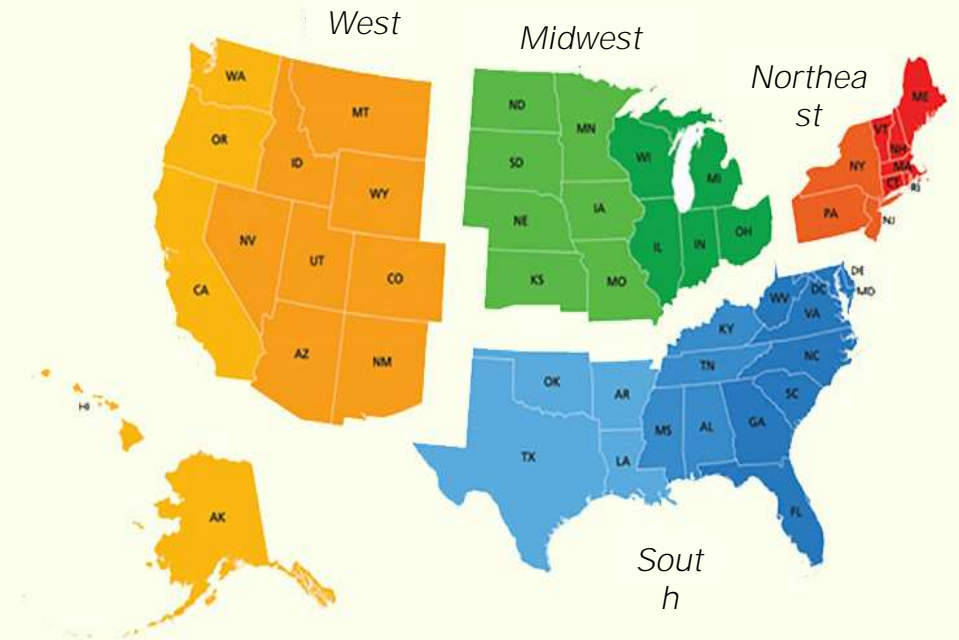
Future Partners

June 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: [May 16-28](#)*
- *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



*July Livestream
Registration*



Presentation deck and
recording will be available on
our website:

FuturePartners.com

*July Livestream
Registration*



Today's Agenda

*July Livestream
Registration*

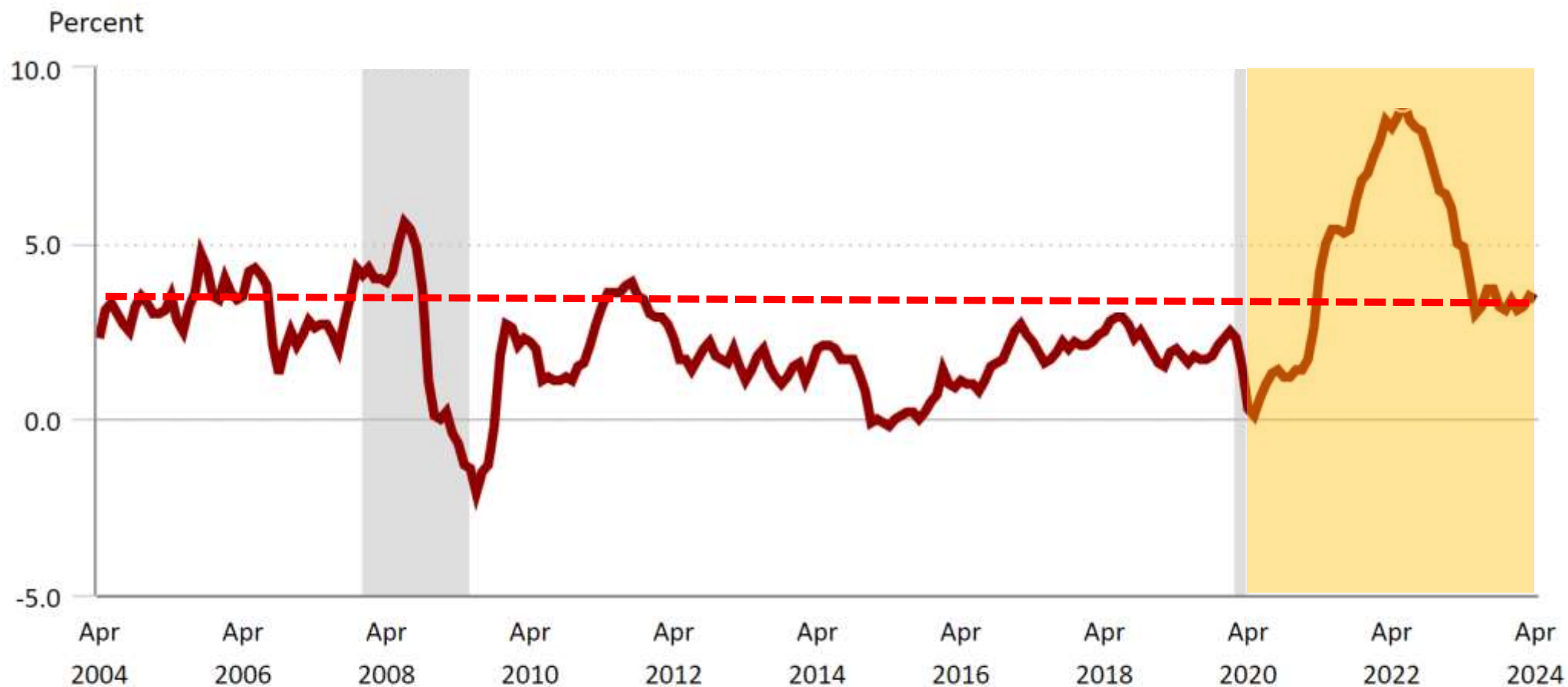


- **Inflation's Lingering Impact on Travel**
- Travel Sentiment Overview
- Digital Influencer Panel

Inflation's Impact on Summer Travel



12-month percentage change, Consumer Price Index, not seasonally adjusted

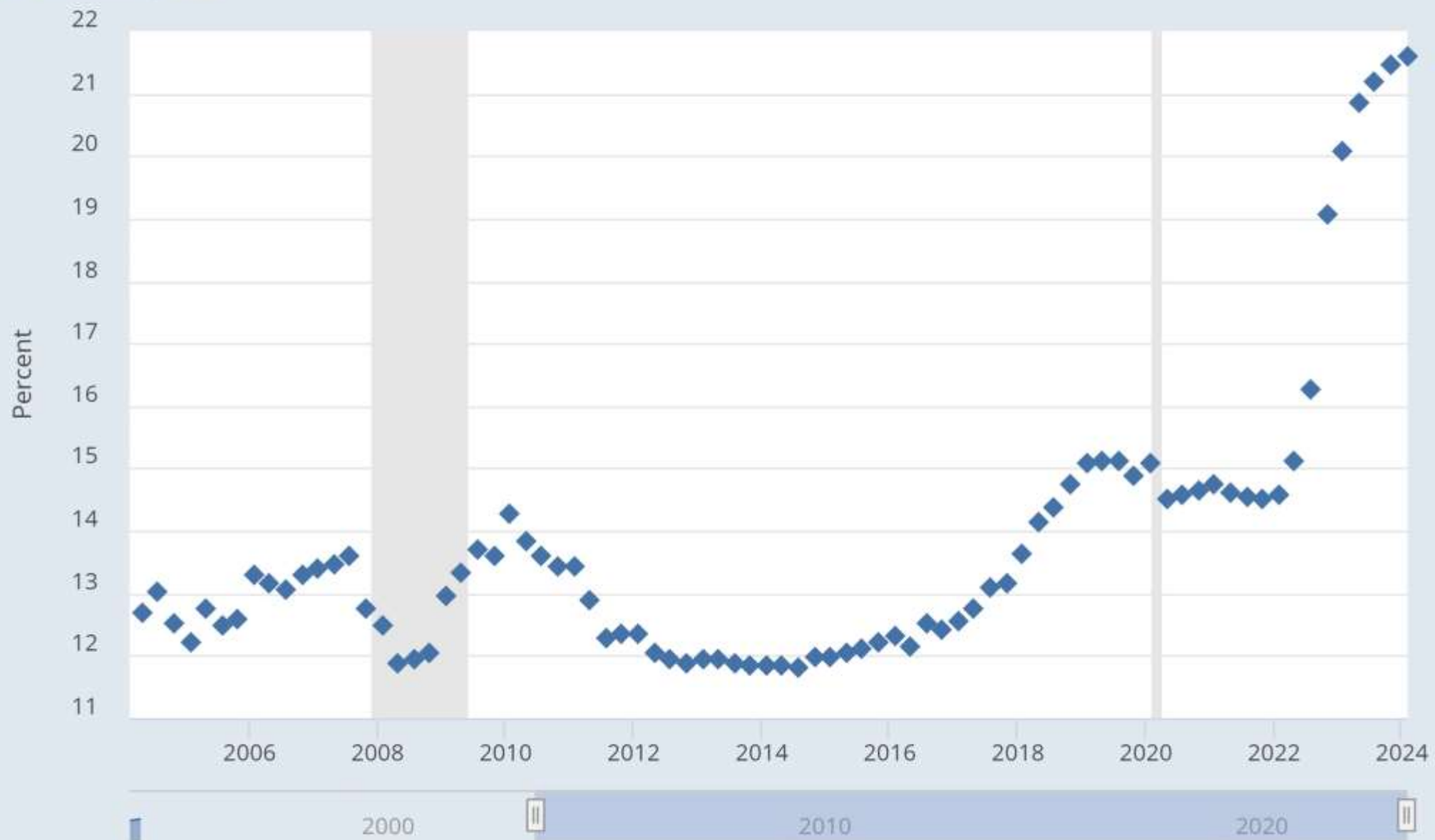


Hover over chart to view data.

Note: Shaded area represents recession, as determined by the National Bureau of Economic Research.

Source: U.S. Bureau of Labor Statistics.



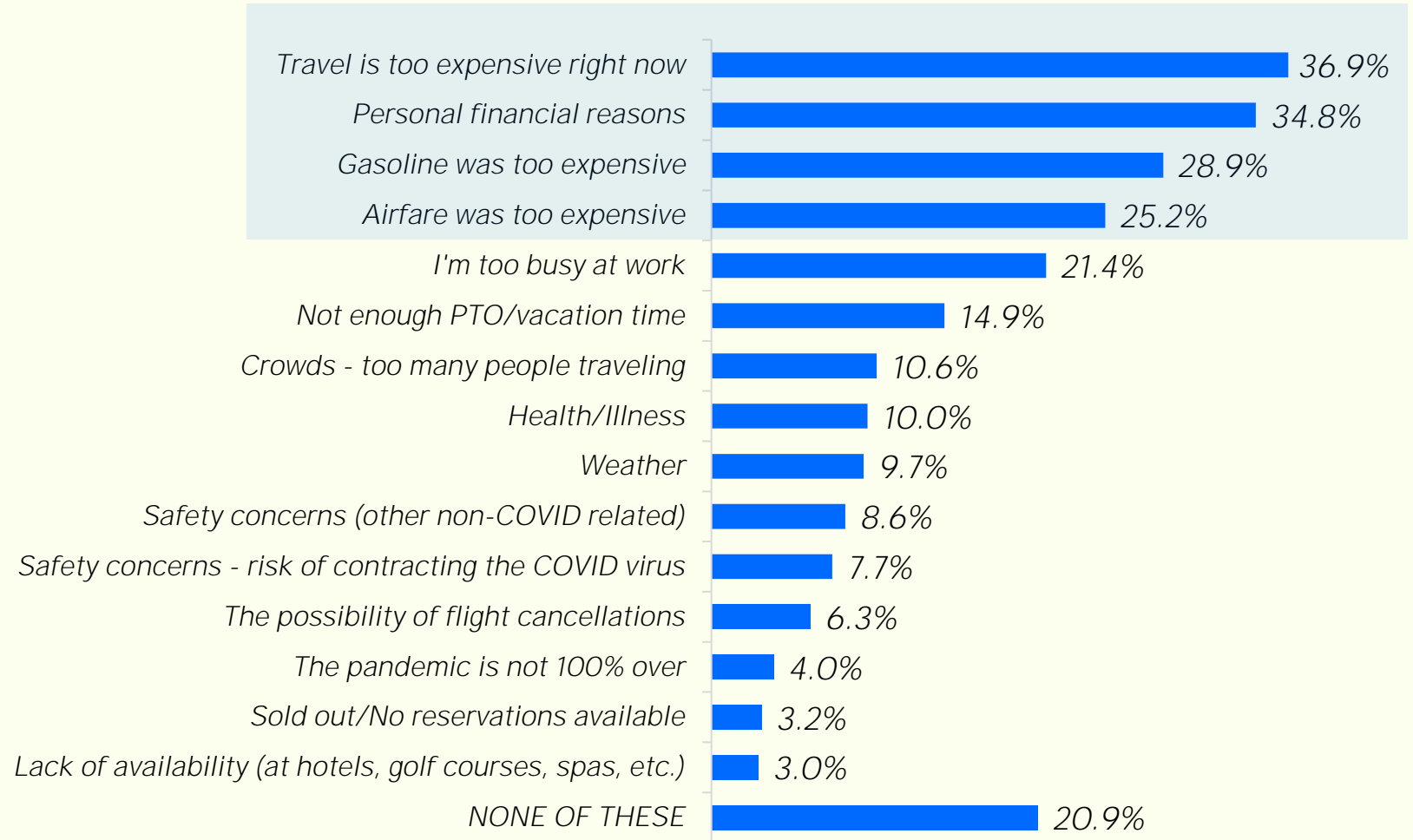


Source: Board of Governors of the Federal Reserve System (US)

The top barriers to travel reported by American travelers continue to be money-related.

Question:

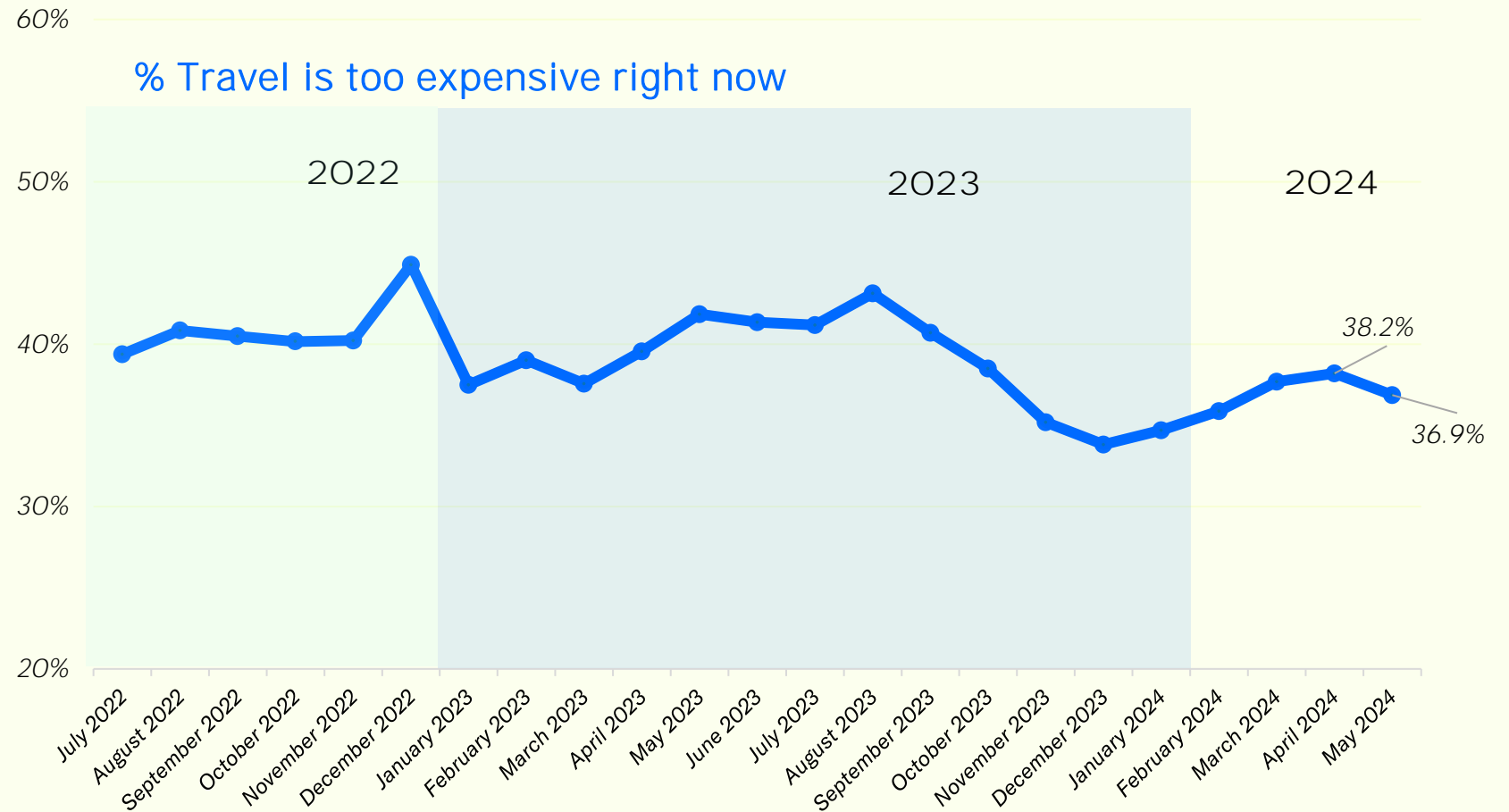
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Travel being “too expensive” had increased as a deterrent in recent months--but turned slightly in May.

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)



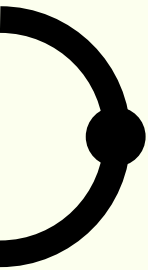


Travel Nostradamus



January 2024
RESULTS

Crowdsourcing Predictions for 2024



Crowding & high costs

January 2024
RESULTS

Statement:

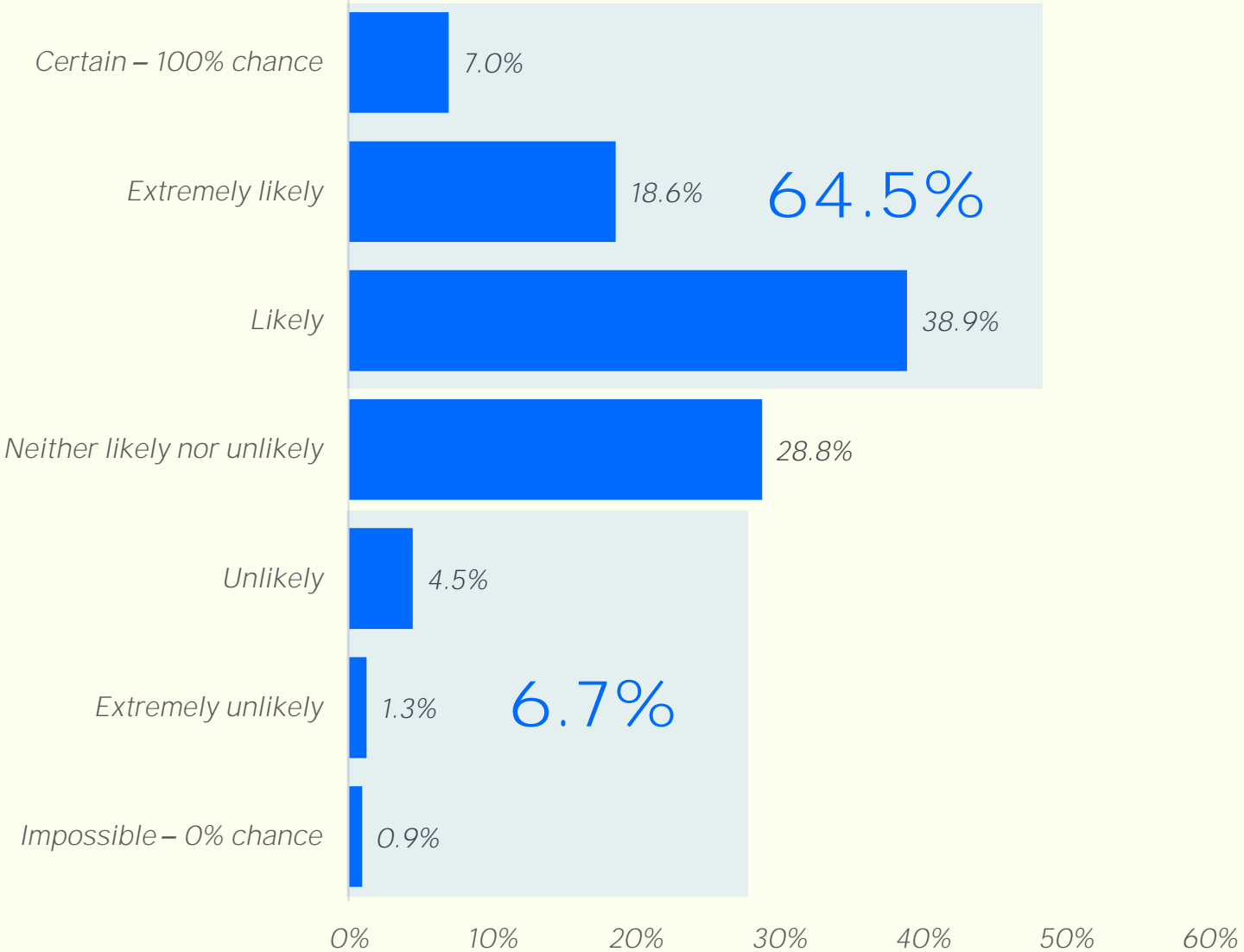
Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.

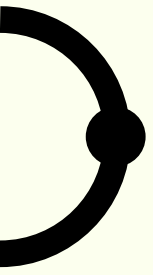
Crowding & High Costs

January 2024
RESULTS

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.





Avoiding over-priced destinations.

January 2024
RESULTS

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

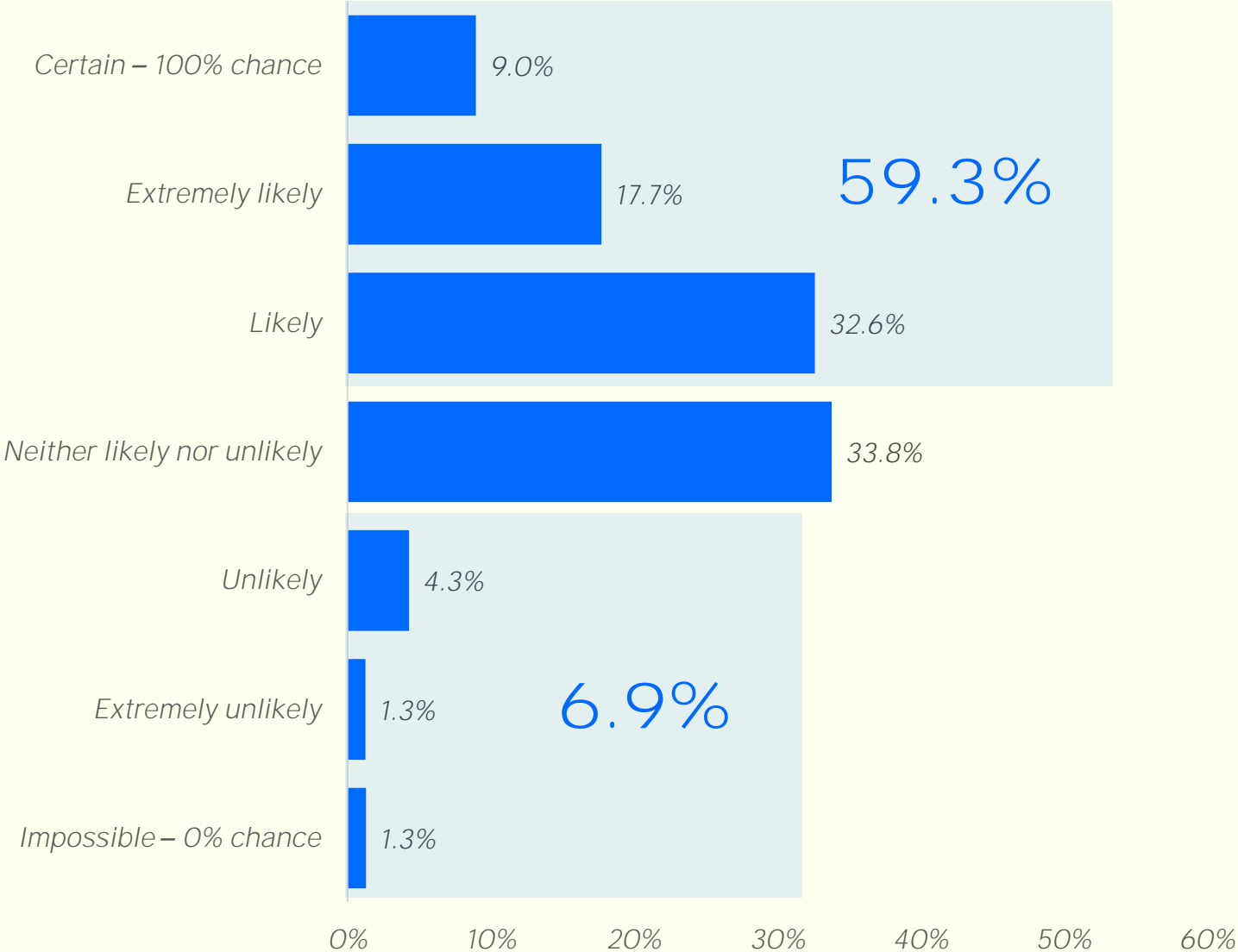
In 2024, visiting dupes will grow in popularity.

Dupes become more popular.

January 2024
RESULTS

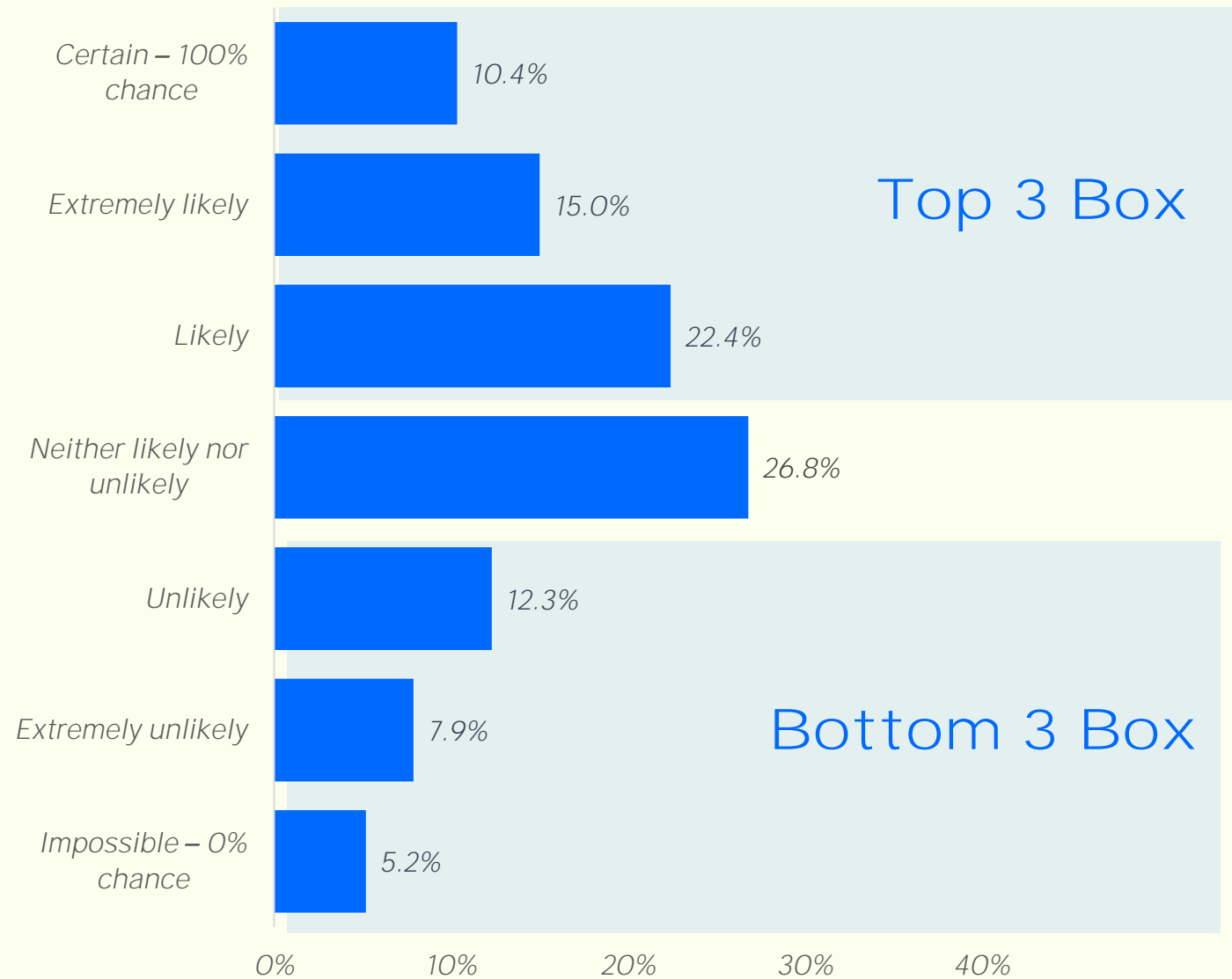
Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2024, visiting dupes will grow in popularity.



Putting it all in perspective

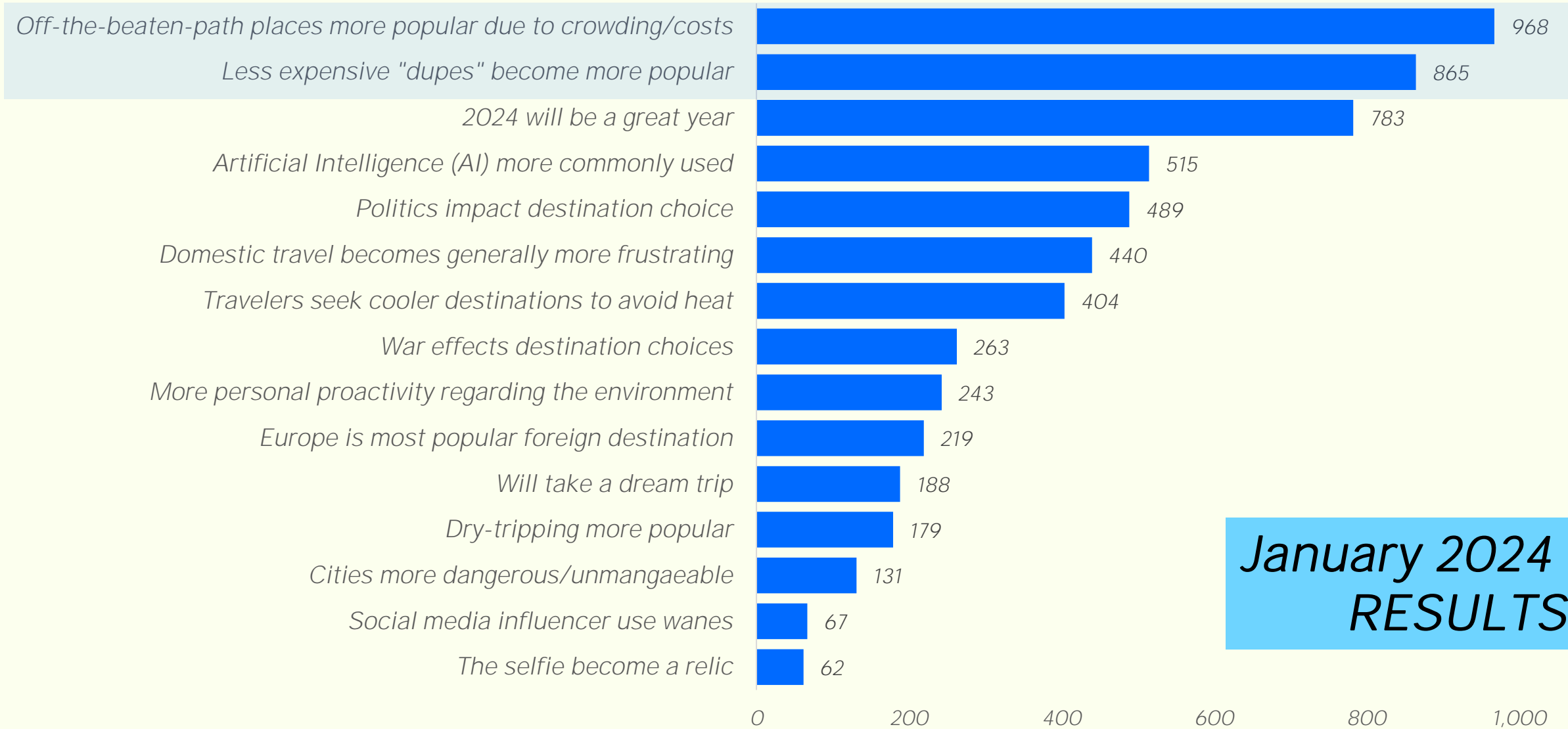
January 2024
RESULTS



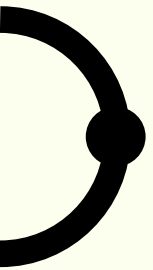
Crowdsourcing Index:

$$\frac{\text{Top 3 Box}}{\text{Bottom 3 Box}} * 100$$

Putting it in perspective



January 2024
RESULTS



Defining “recent inflation” for survey respondents

Definition:

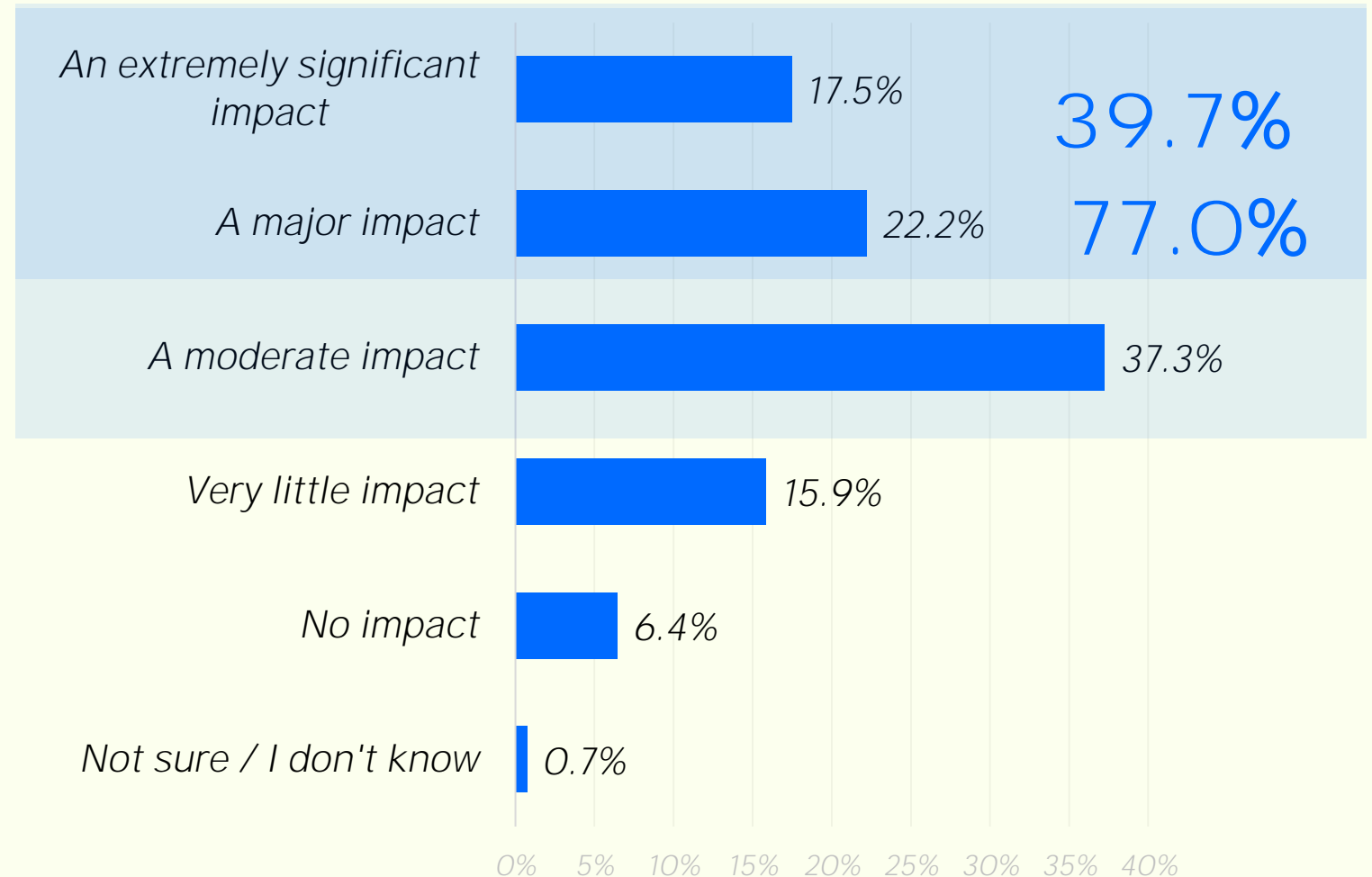
*The cost of living (i.e., inflation) over the past three years has increased in the US and globally. In the following questions, the term **"recent inflation"** refers to this situation.*

American travelers' sense of financial well-being has been significantly impacted by recent inflation.

Question:

How, if at all, has this recent inflation impacted your sense of financial well-being? (Select one to best fill in the blank.)

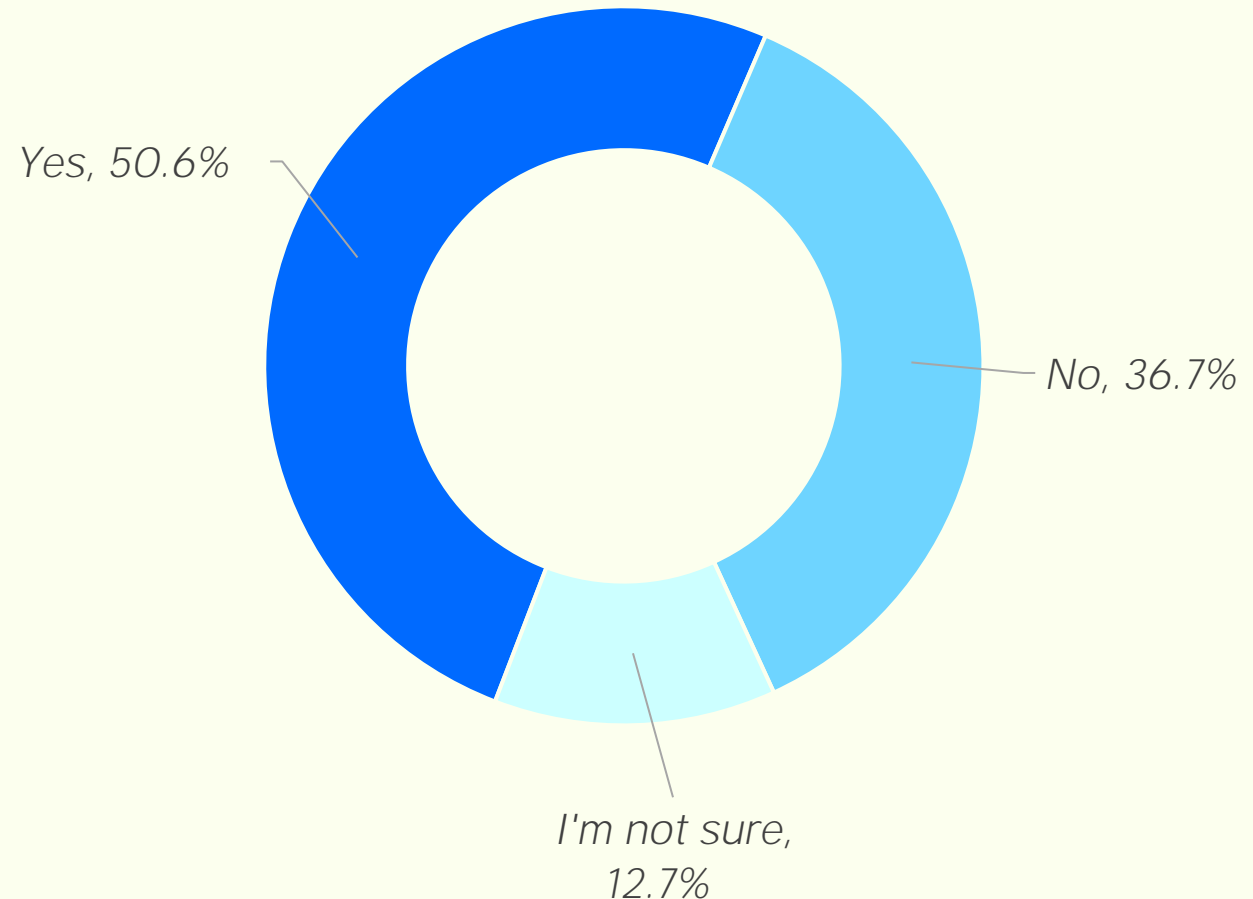
Inflation has had _____ on my sense of financial well-being.



Half of American travelers expect to alter their summer travel plans as a result of recent inflation.

Question:

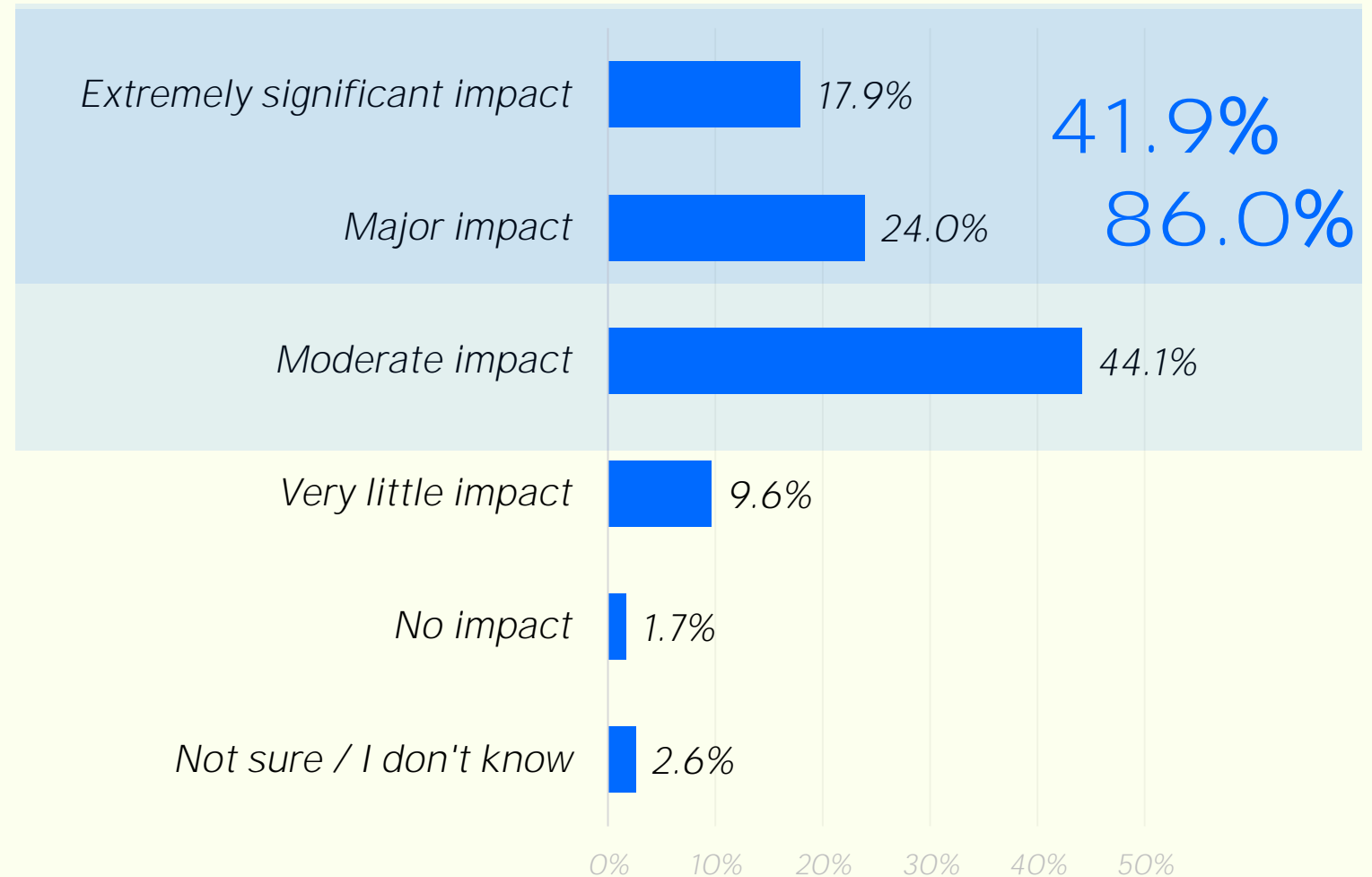
Due to recent inflation, will you make any changes to the way you plan, budget, or execute your SUMMER TRAVEL?



Many American travelers expect recent inflation will significantly impact their summer travel behavior.

Question:

Overall, how significant do you think the impact of recent inflation will be on your SUMMER TRAVEL PLANS?



Base: Respondents altering the way they plan, budget, or execute their summer travels. 2,477 respondents.

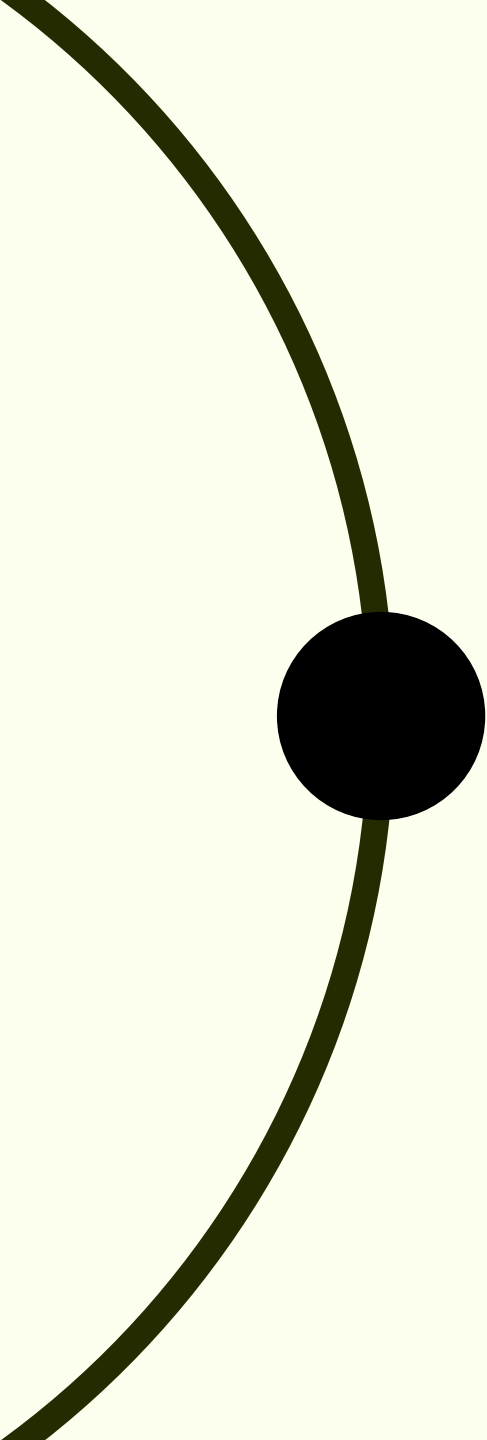
The summer most travelers will be looking for deals and discounts.

Question:

Due specifically to recent inflation's impact on your finances, which of the following will you be likely to do this summer?

Avg. = 2.9 of these





Current Sentiment

*July Livestream
Registration*



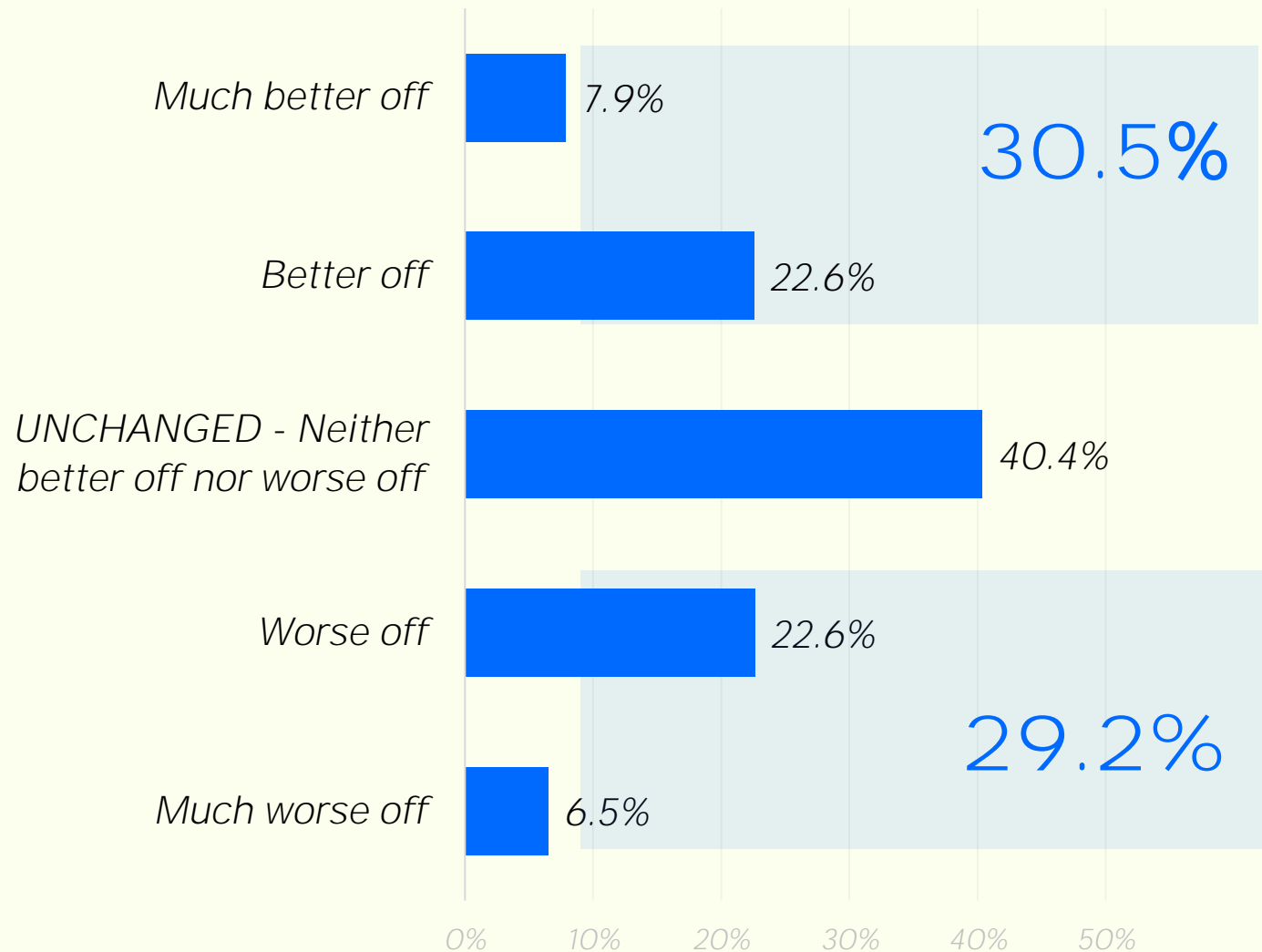
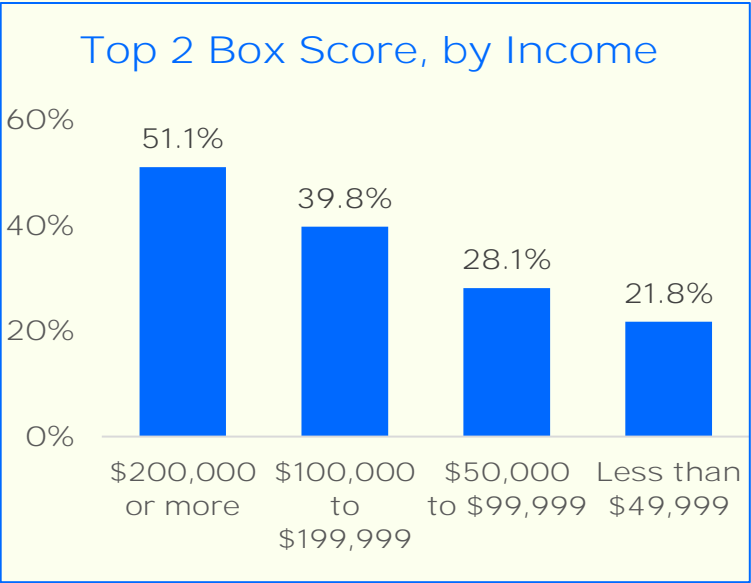
As we move toward summer--and despite continuing stress over the cost of living--overall traveler sentiment is solid.



Travelers remain relatively split on their current financial situation.

Question:

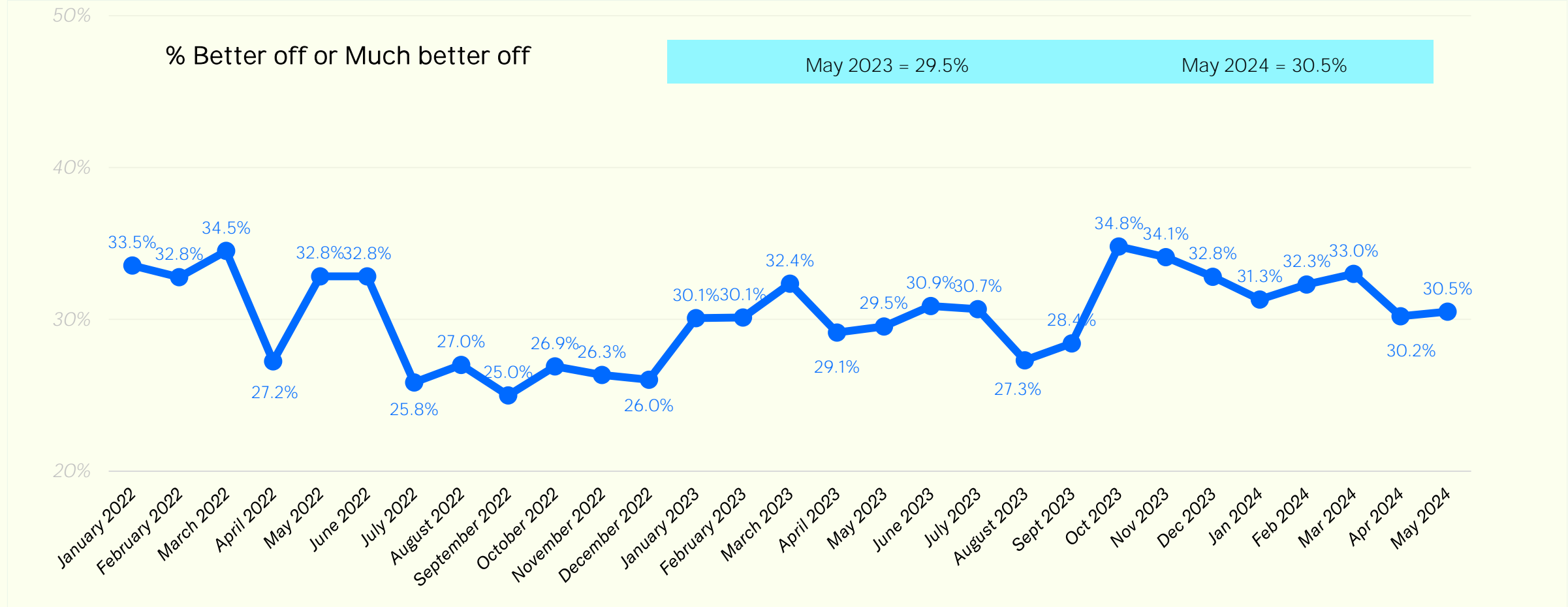
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



This month the proportion of travelers feeling “Better off financially” was unchanged.

Question:

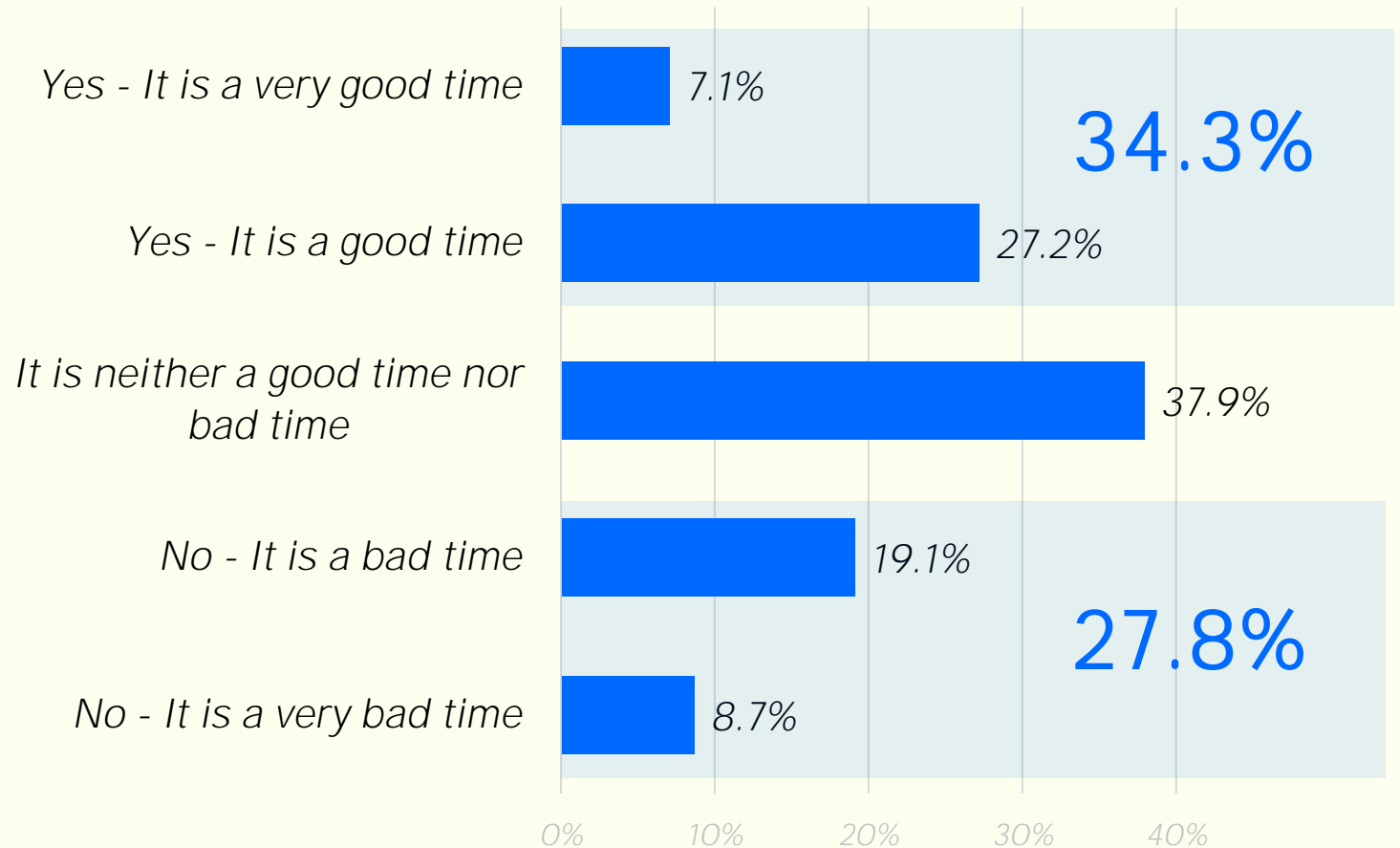
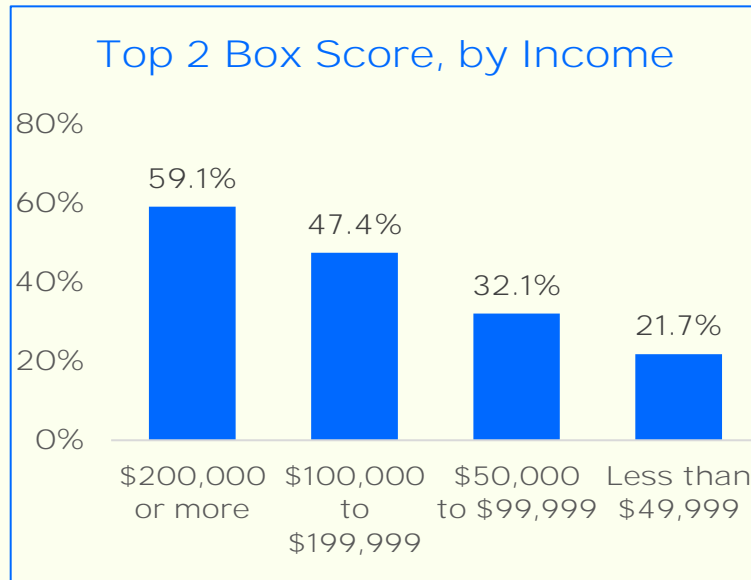
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Travelers remain split of whether now is a good time to spend on leisure travel.

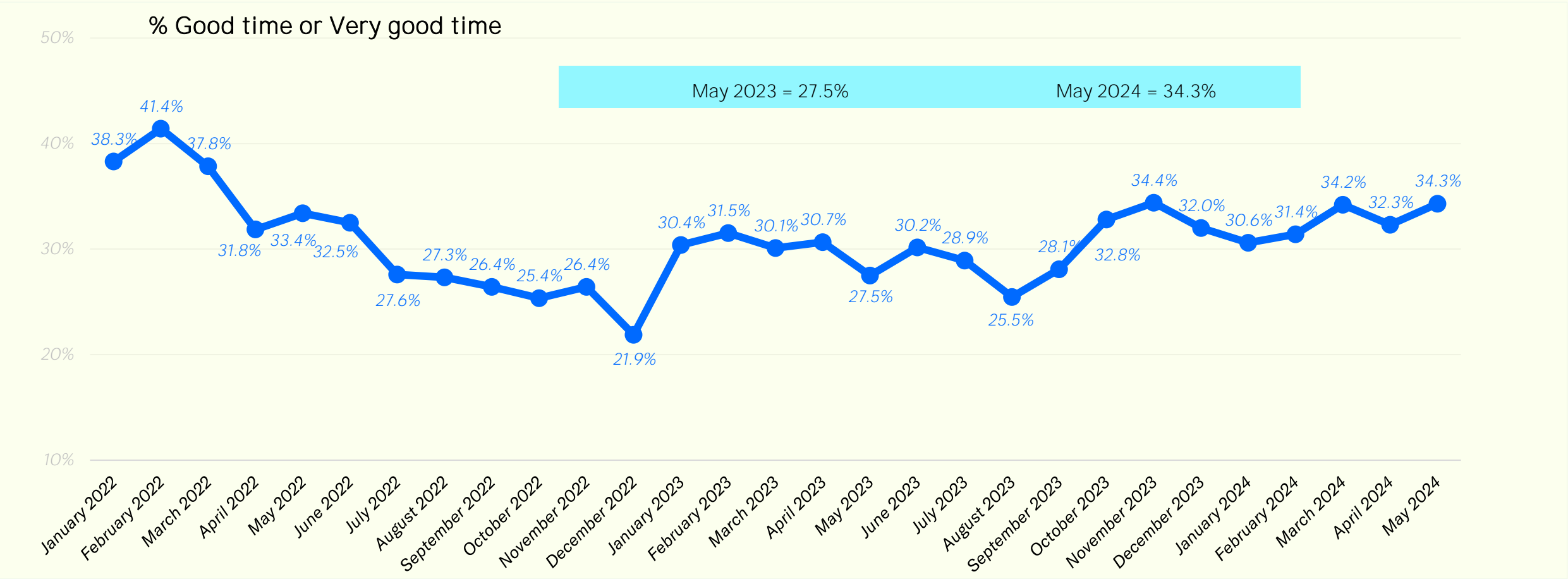
Question:

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?



The belief that now is a “good time to spend on leisure travel” increased slightly in the last 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?



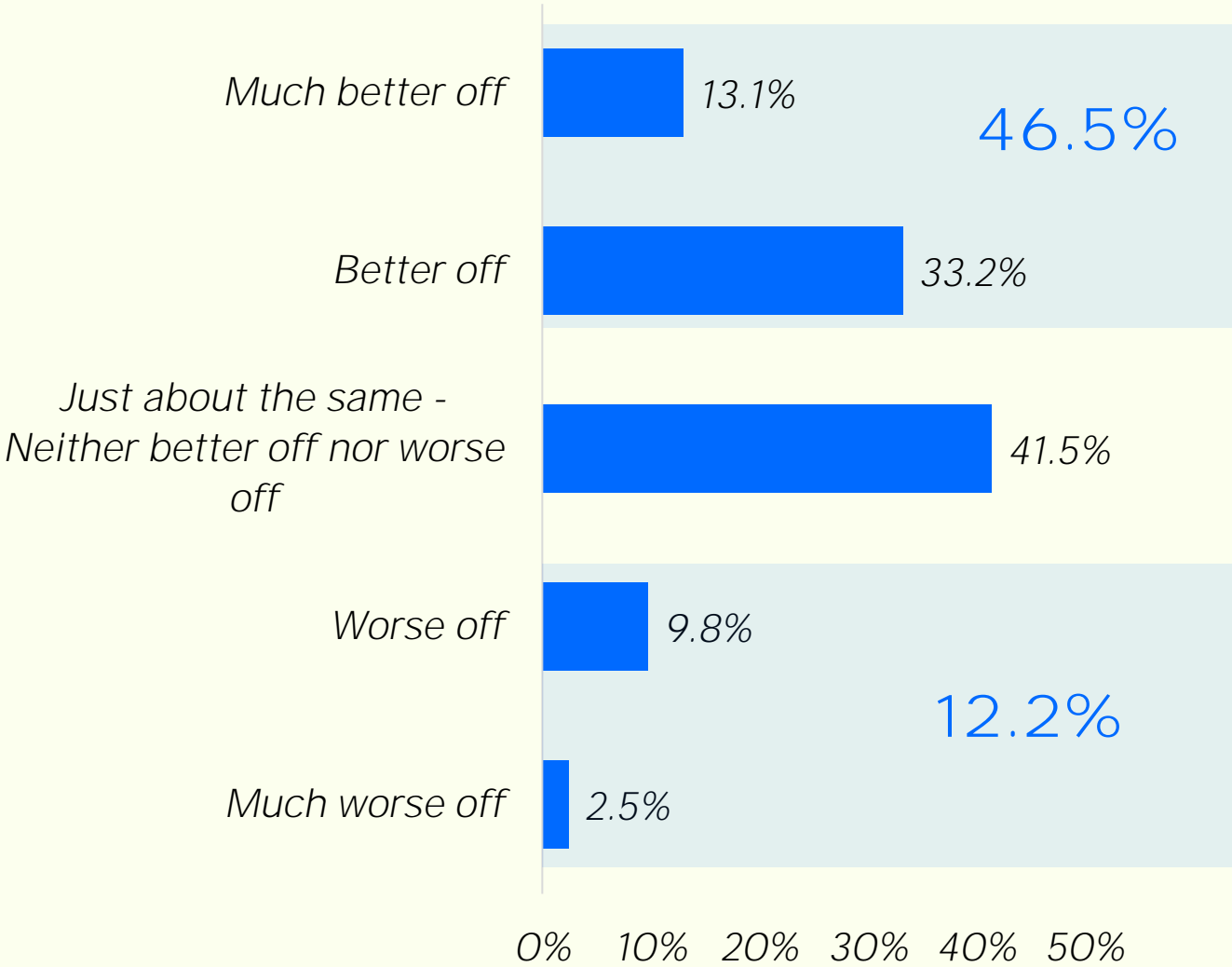
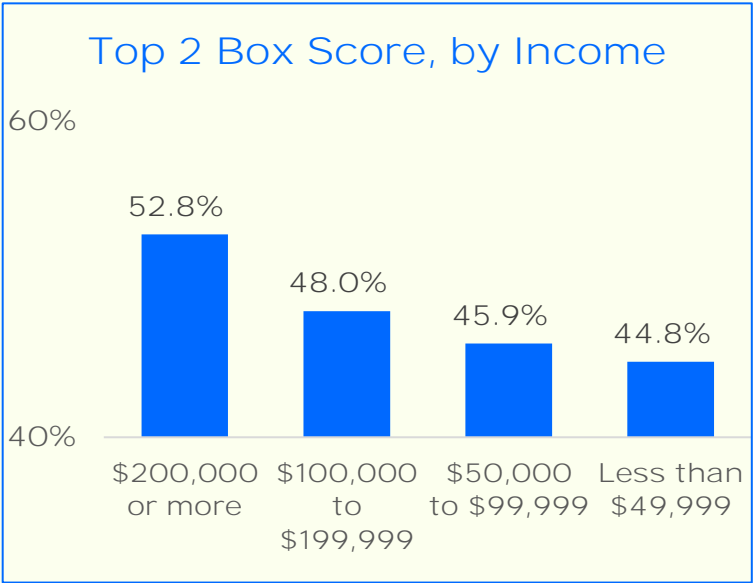
Looking Forward

Future Partners



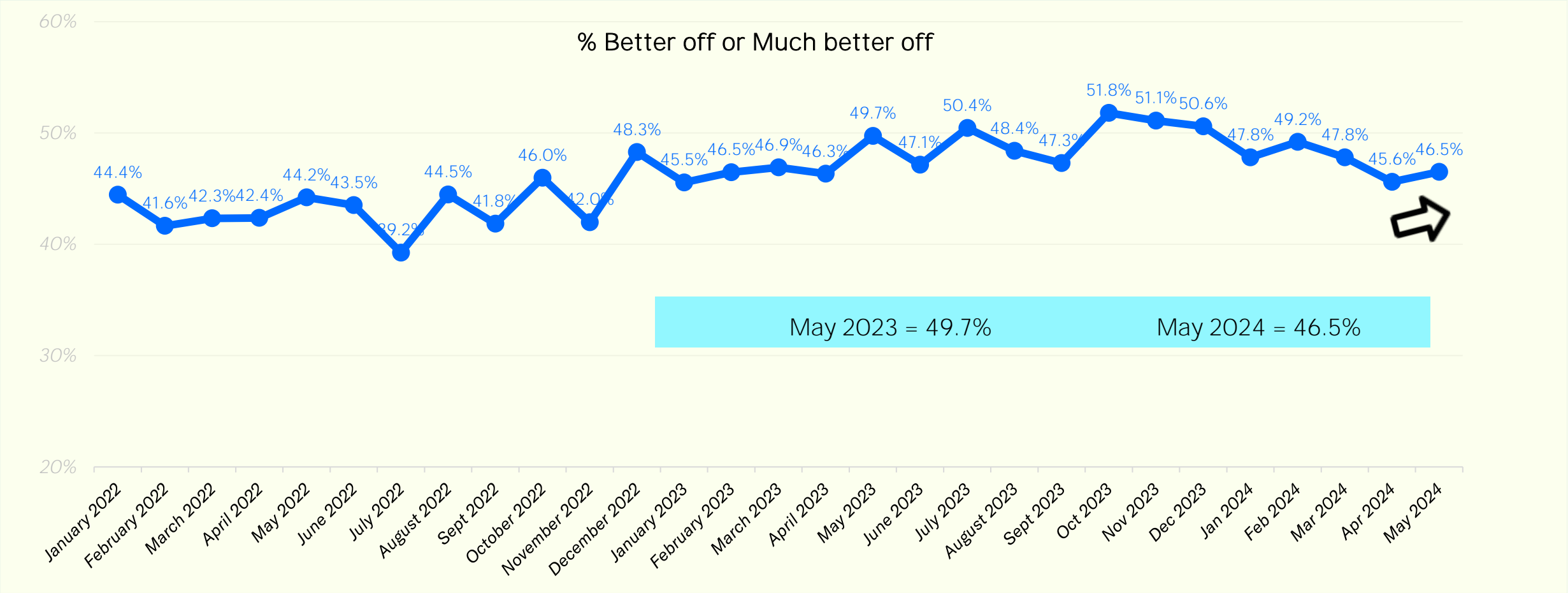
Most travelers maintain a general sense of optimism about their future finances.

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?



This financial optimism tipped upward oh so slightly this month.

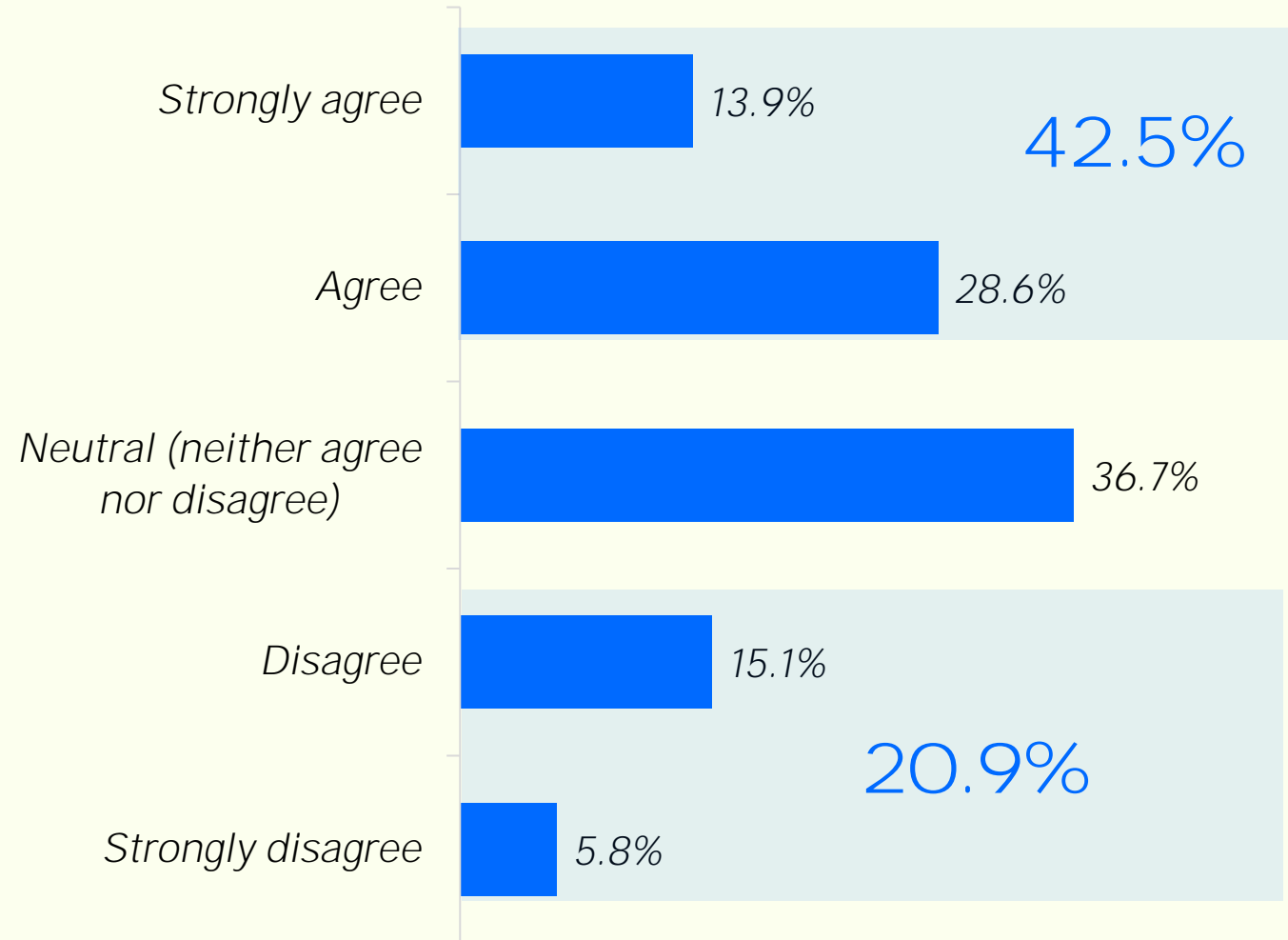
Question:
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Only 42.5% of American travelers now expect a coming recessionary period.

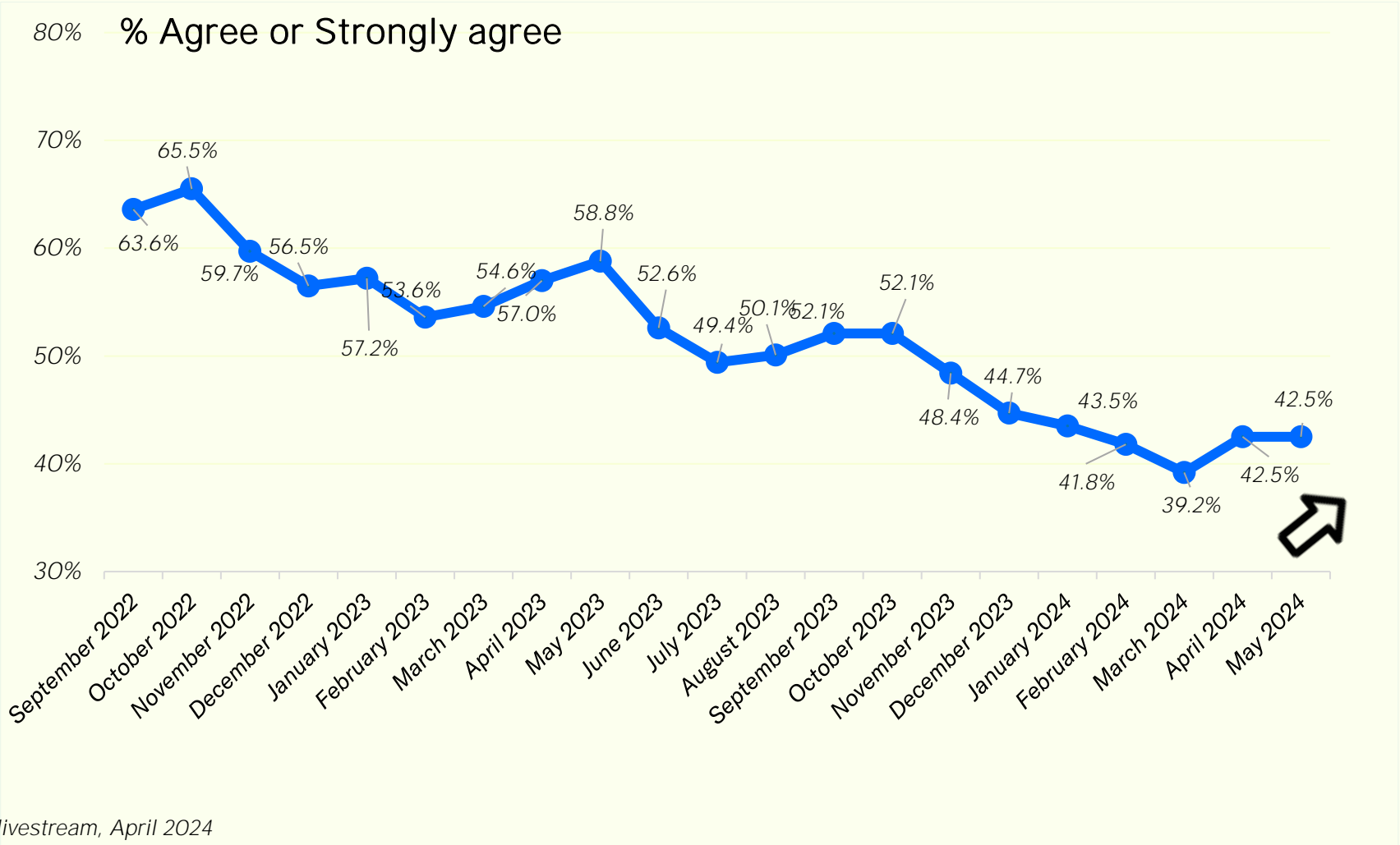
Question:

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



...this held constant in May.

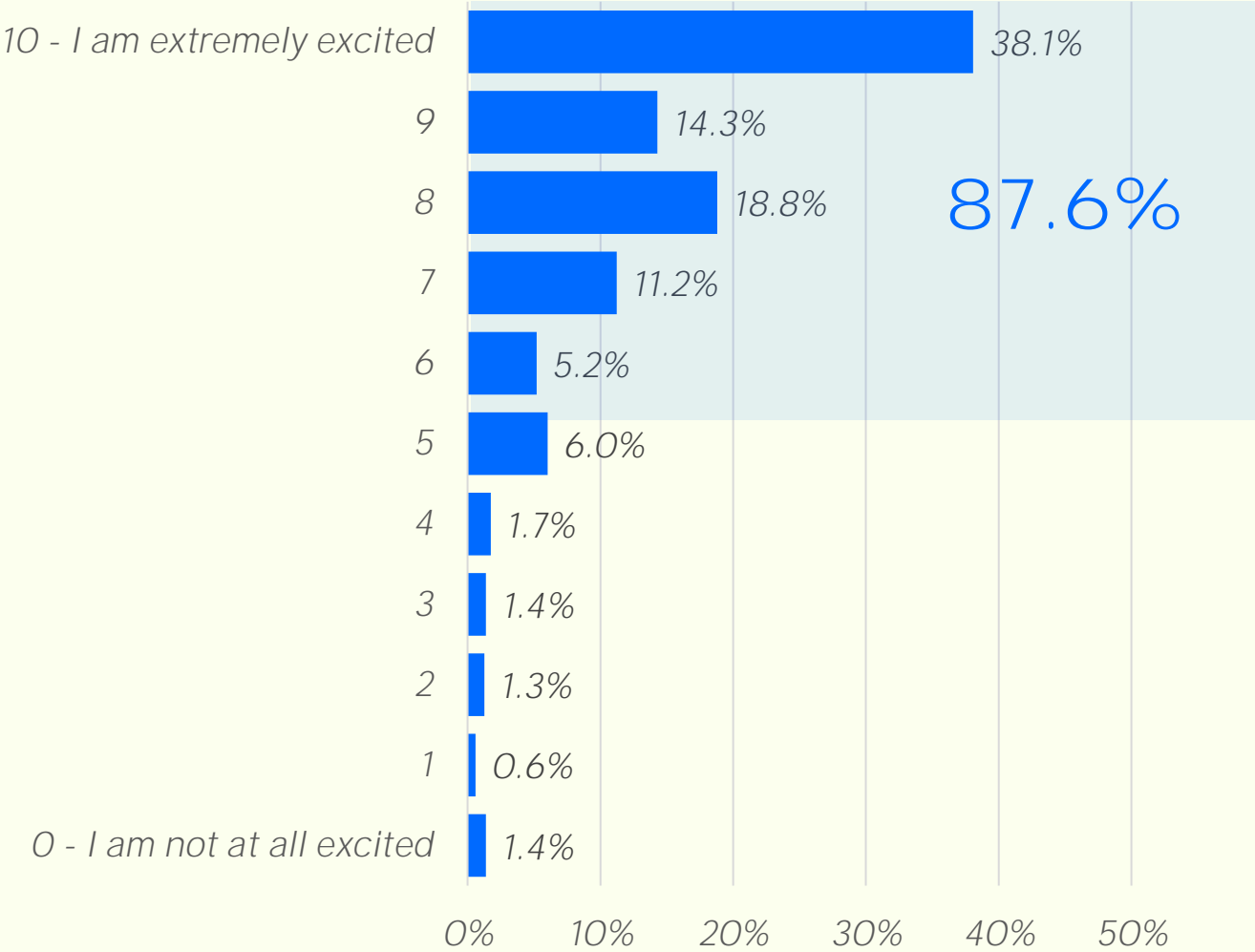
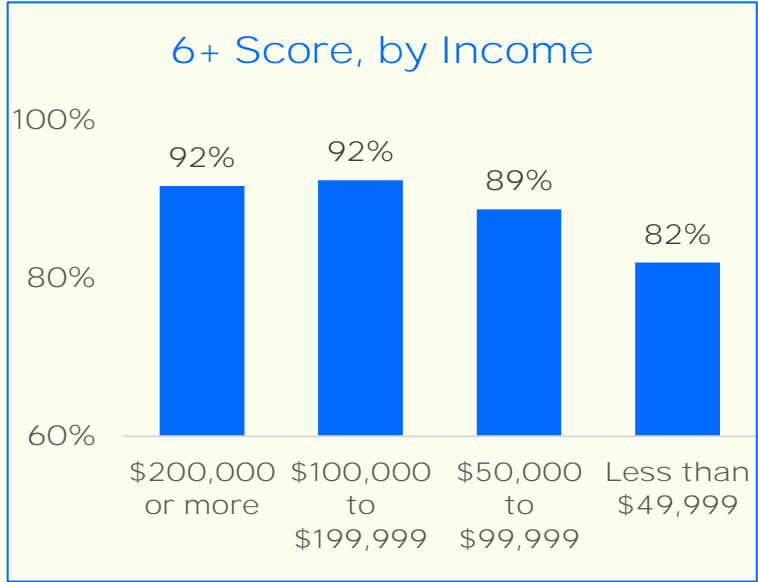
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Excitement for travel remains elevated.

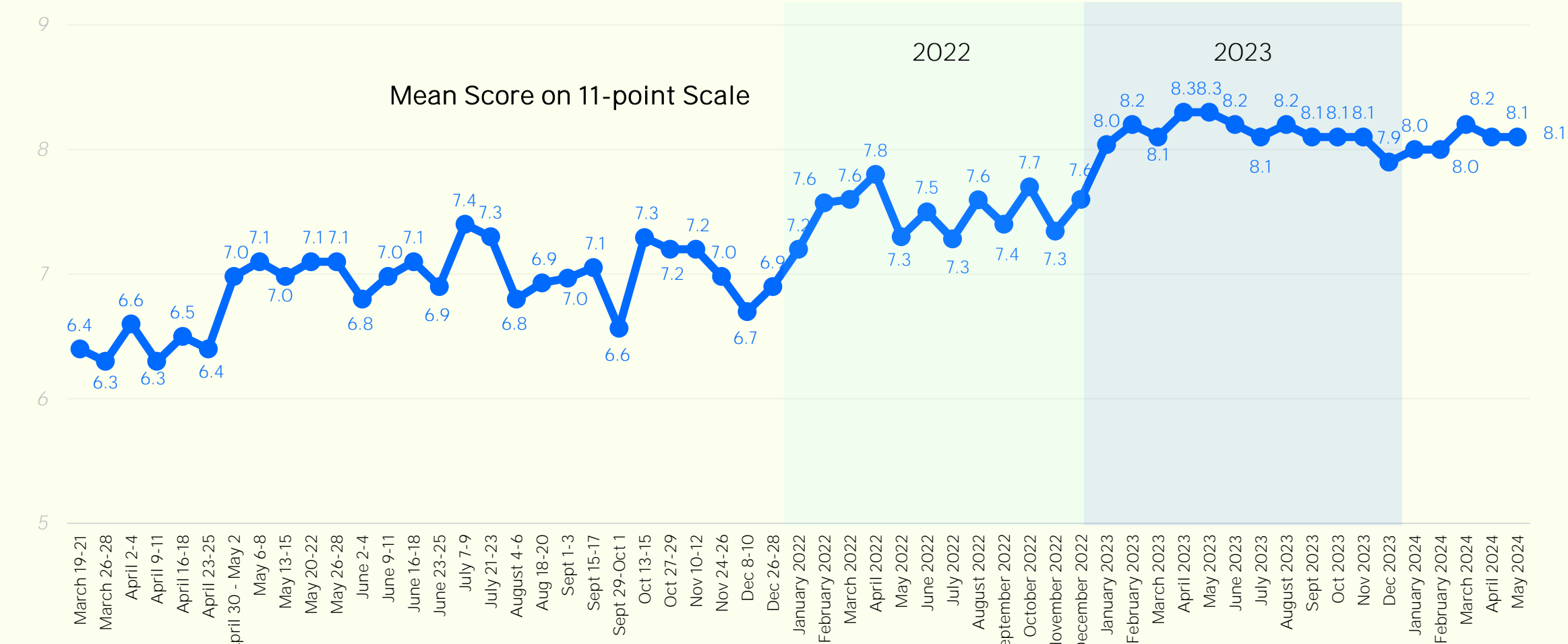
Question:

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



Overall excitement to travel was flat this month.

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

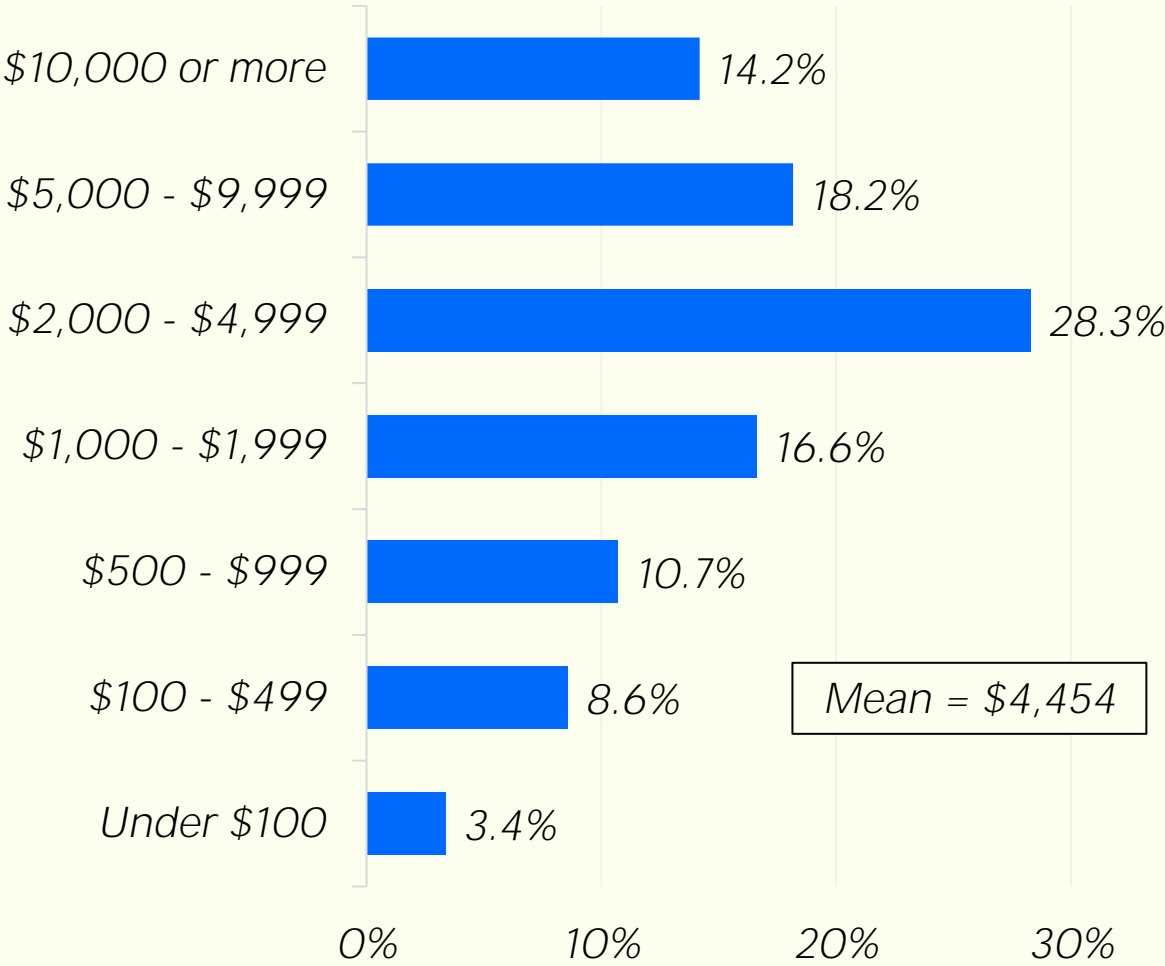
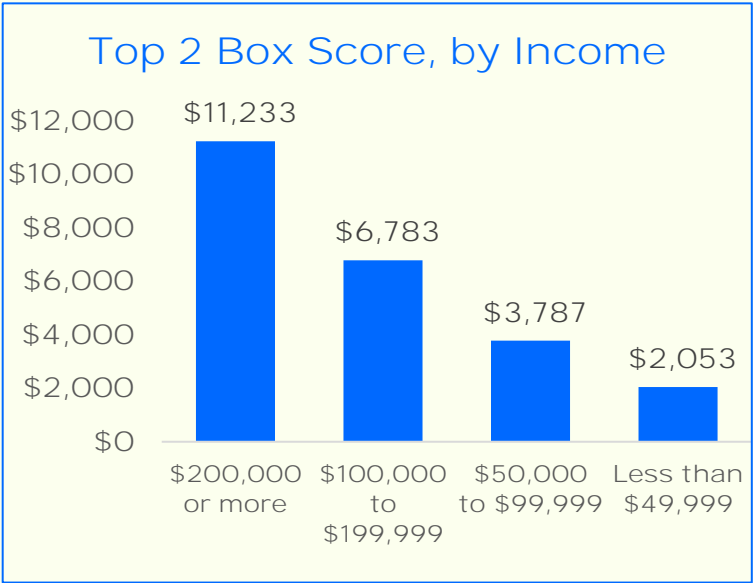


Expected travel budgets however dropped in May

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?

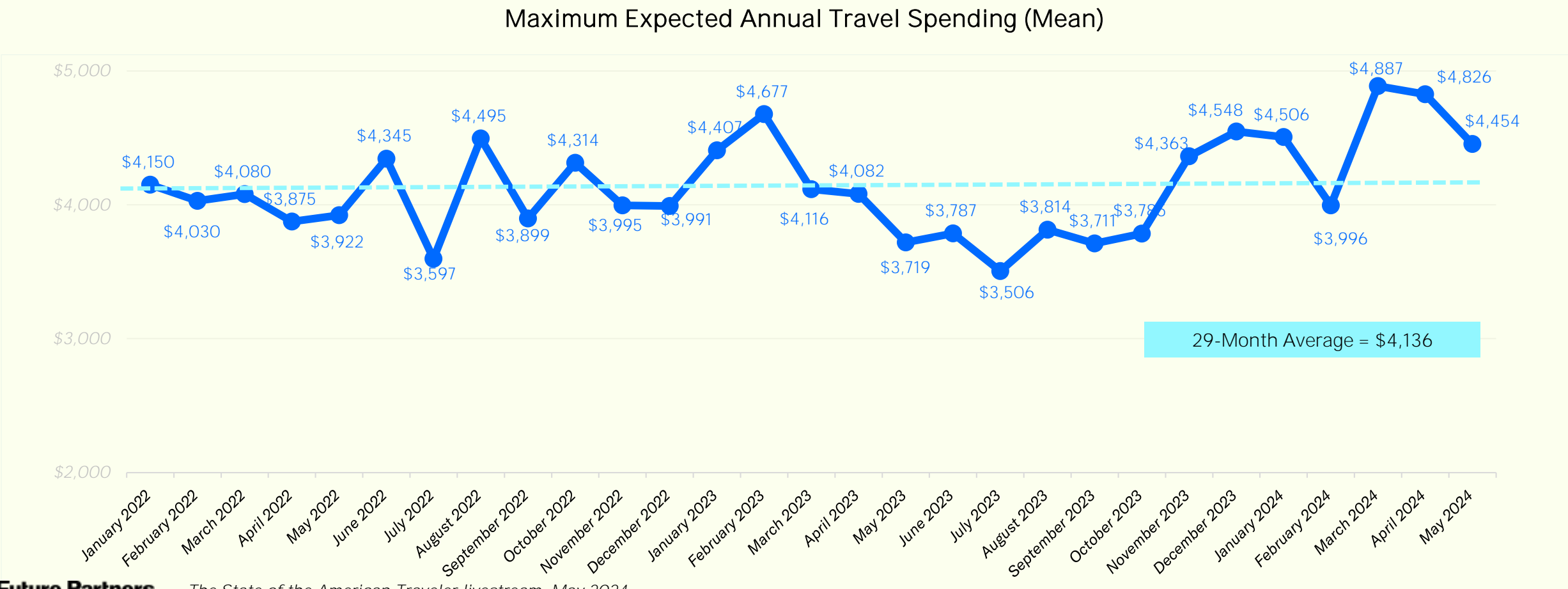
Maximum I would spend on leisure travel (next 12 months): _____



...but still remain above the recent trend.

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):

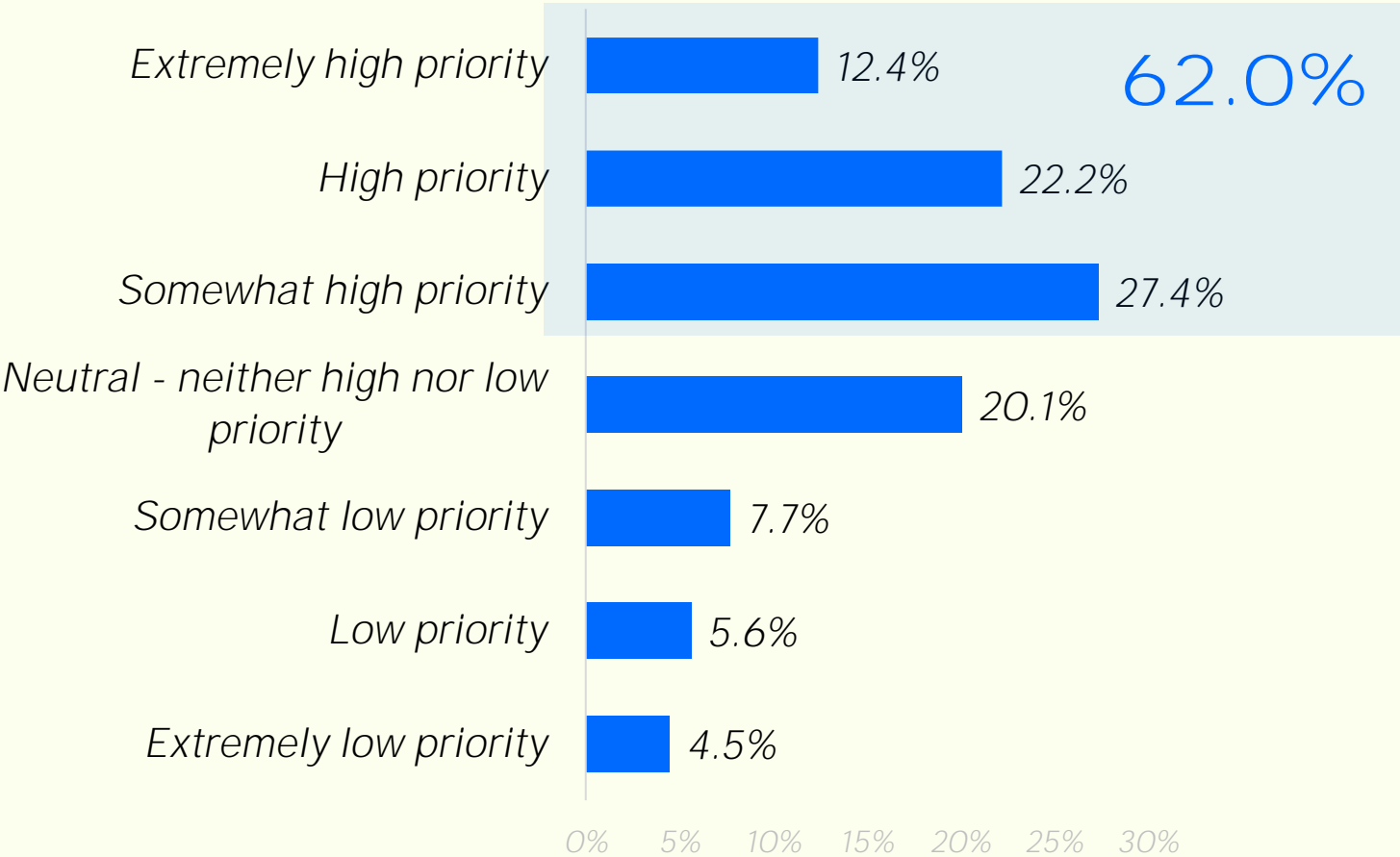
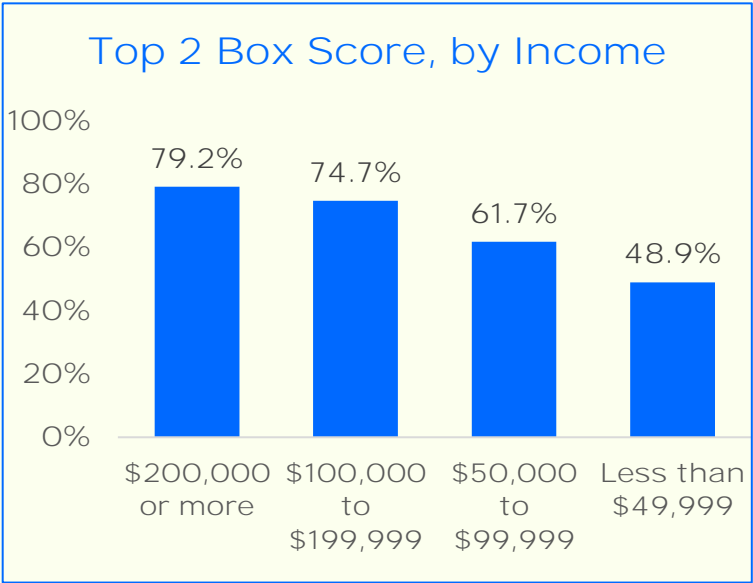


Most intend to make leisure travel a spending priority in the next three months.

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.

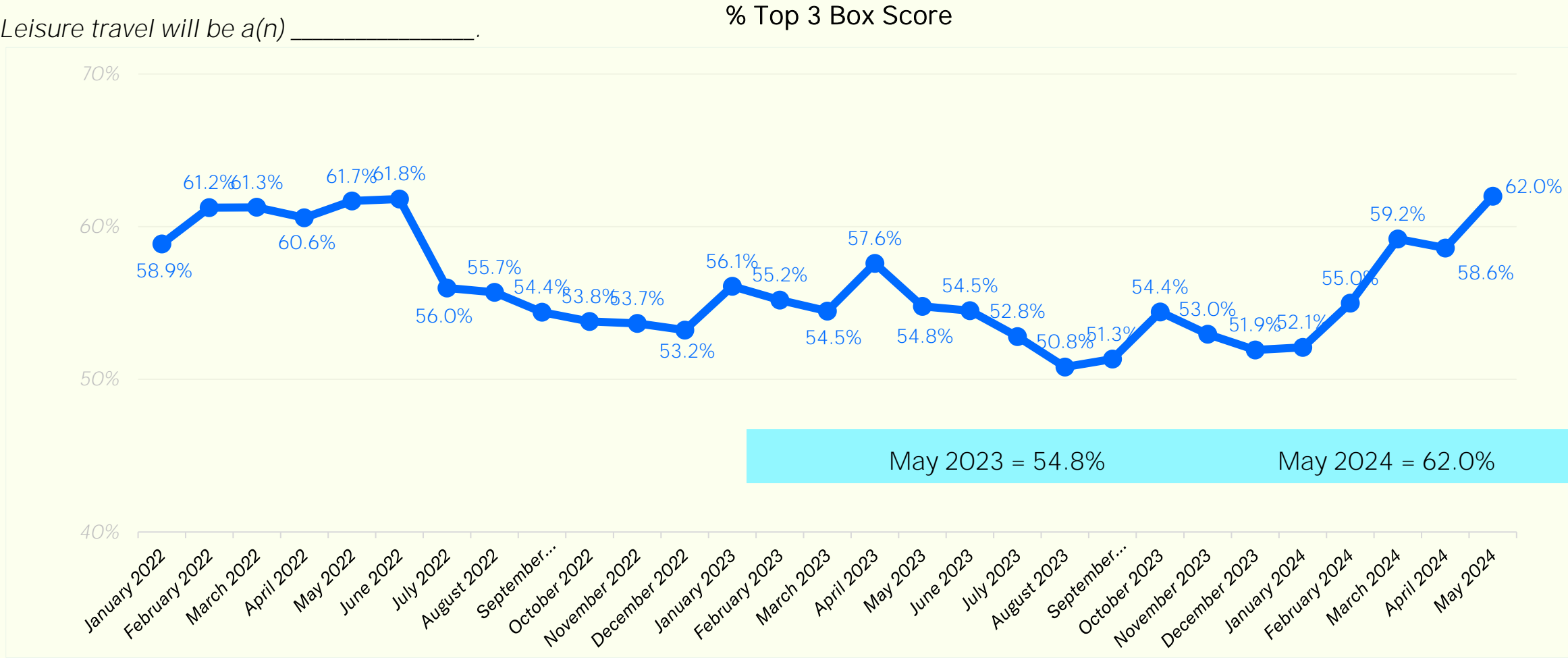
Leisure travel will be a(n) _____.



...but moved strongly upward in May.

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.

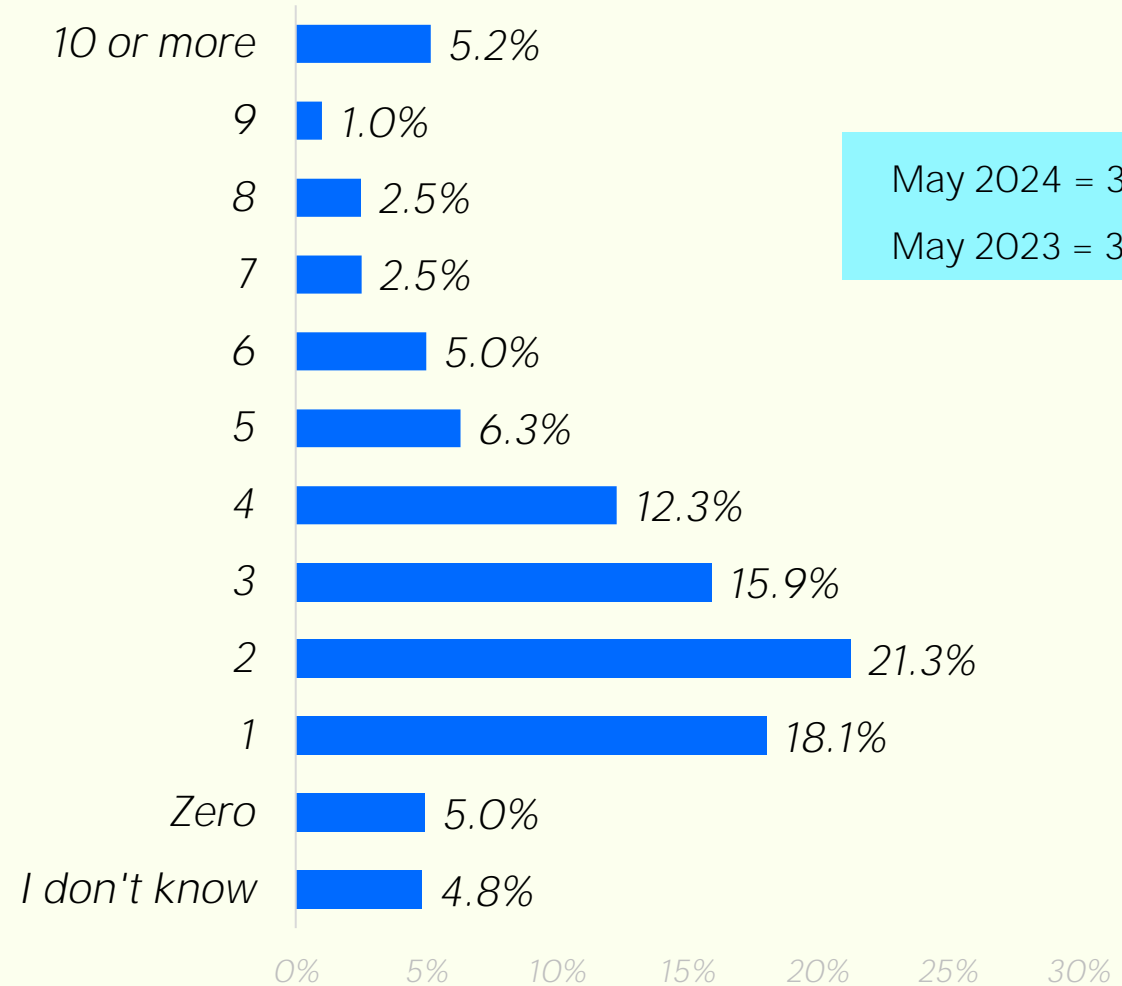
Leisure travel will be a(n) _____.



Travel expectations decreased slightly in May.

Question:

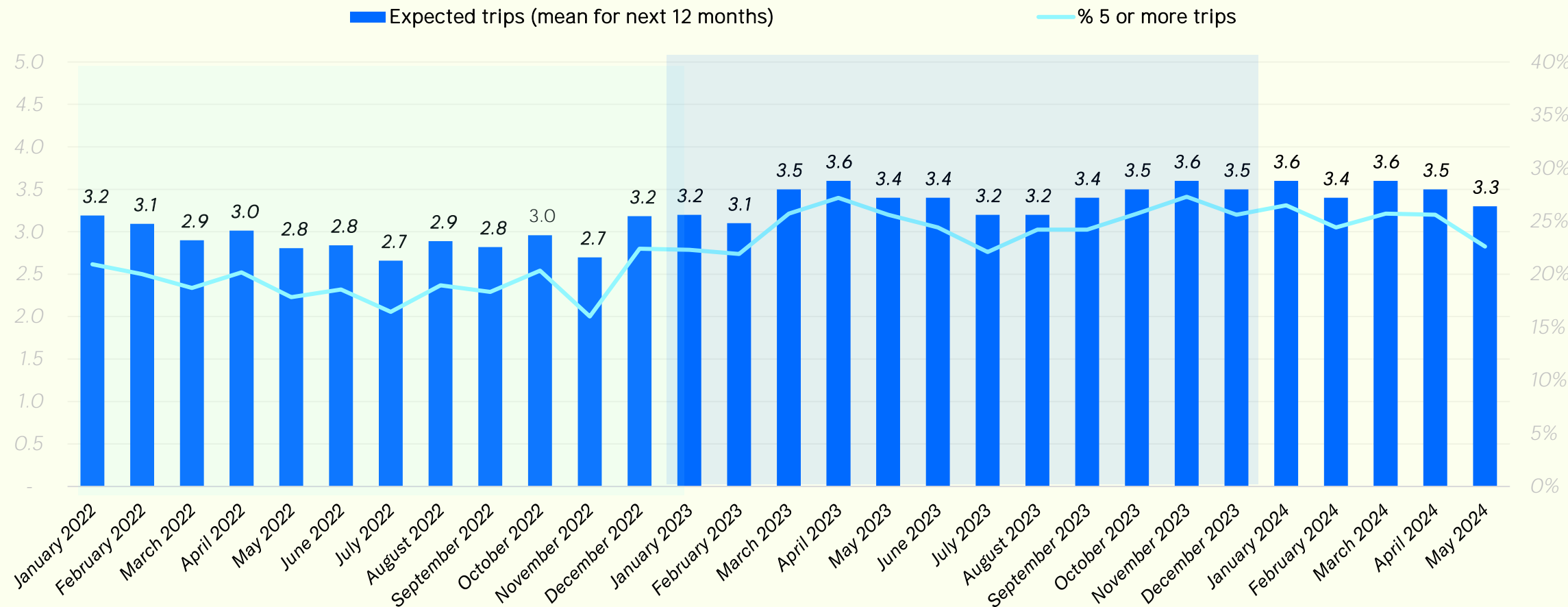
*IN TOTAL, how many leisure trips
(of 50 miles or more from your
home) do you expect to take
in NEXT TWELVE (12) MONTHS?*



Travel expectations dipped in May.

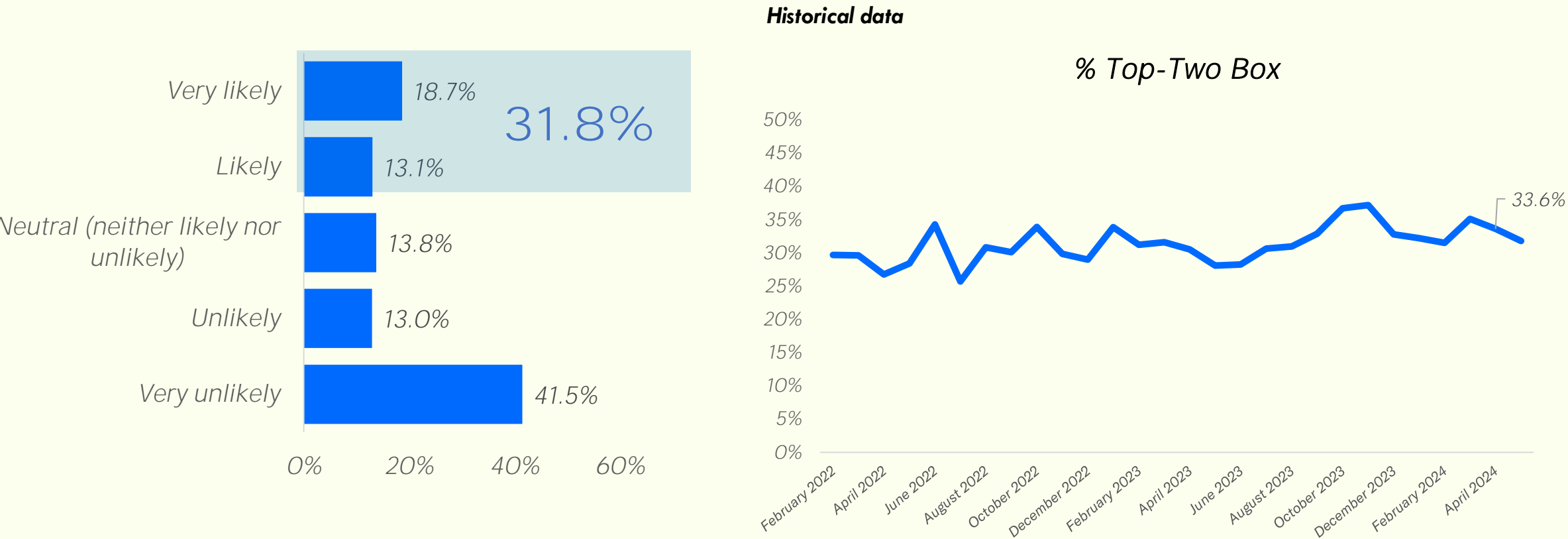
Question:

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



...expectations to travel abroad in the next 12 months dipped slightly this month.

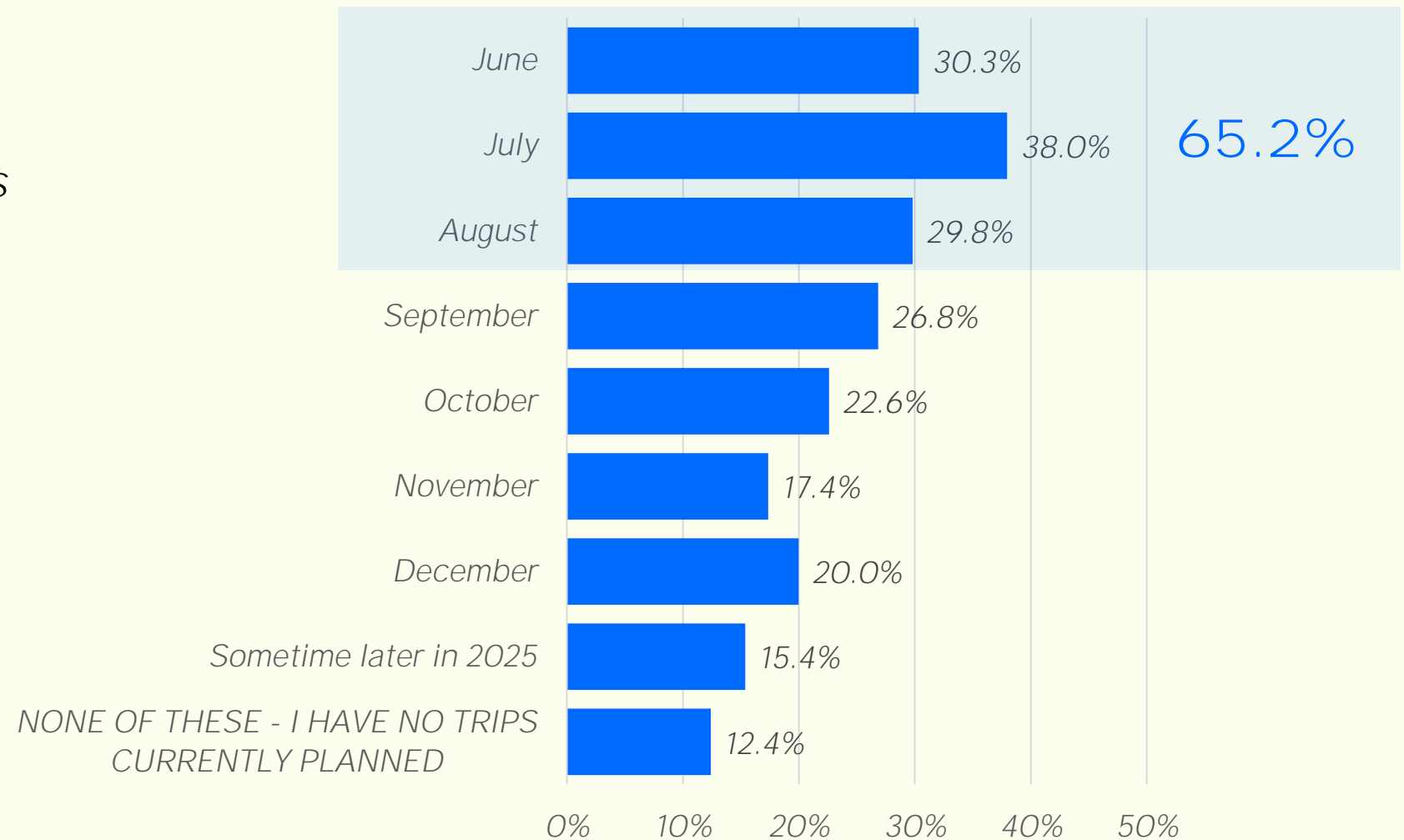
Question: *How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?*



The summer season looks strong, with 65% of travelers having a summer trip on the books.

Question:

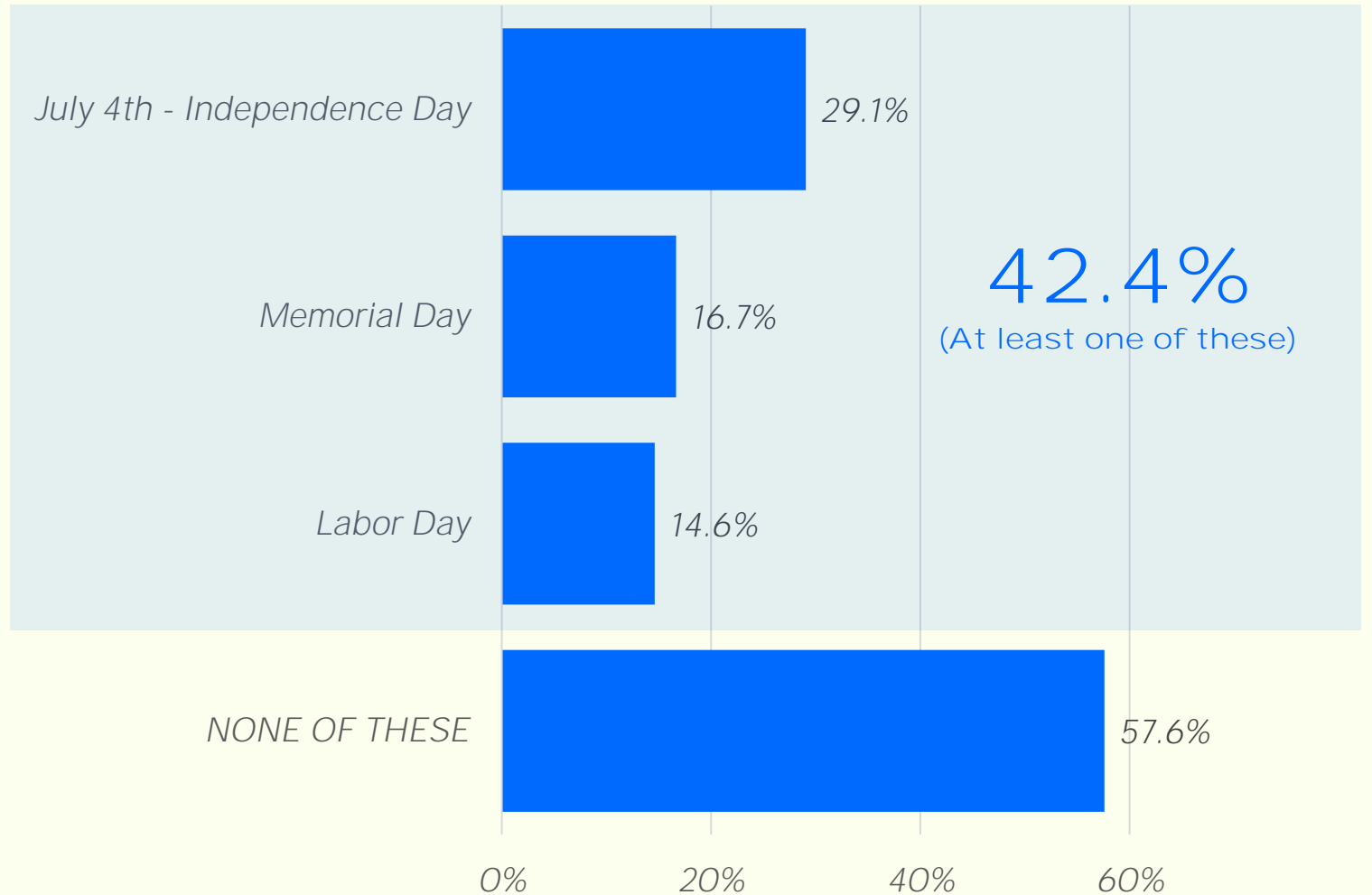
In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



Summer holiday travel also is looking strong.

Question:

Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays?



Business & Group Meeting Travel

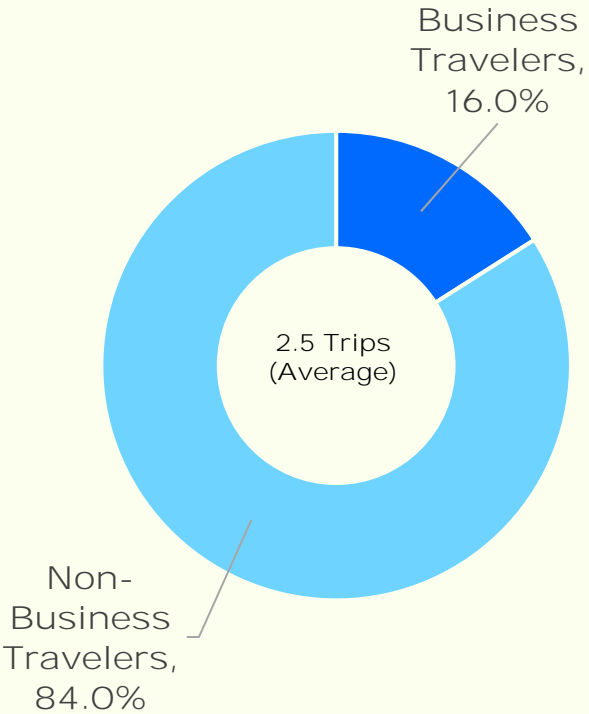
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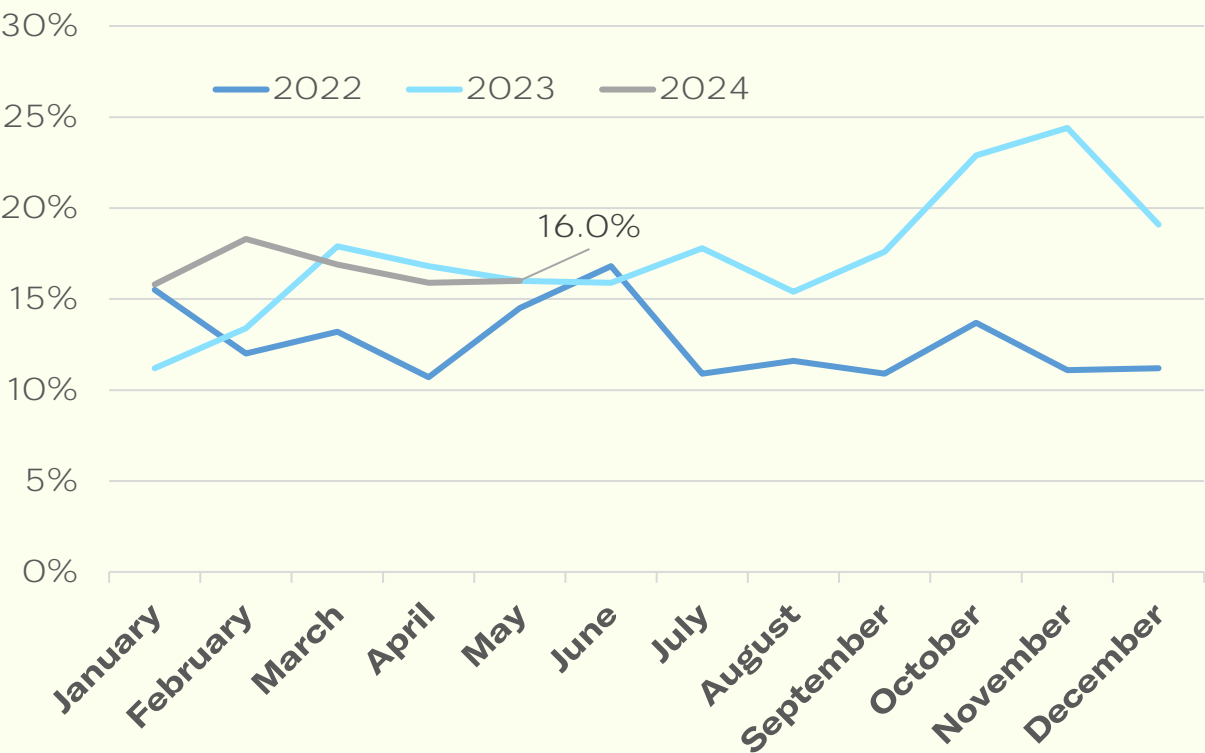
Overnight business travel grew last year and the proportion of travelers taking such trips is solid.

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

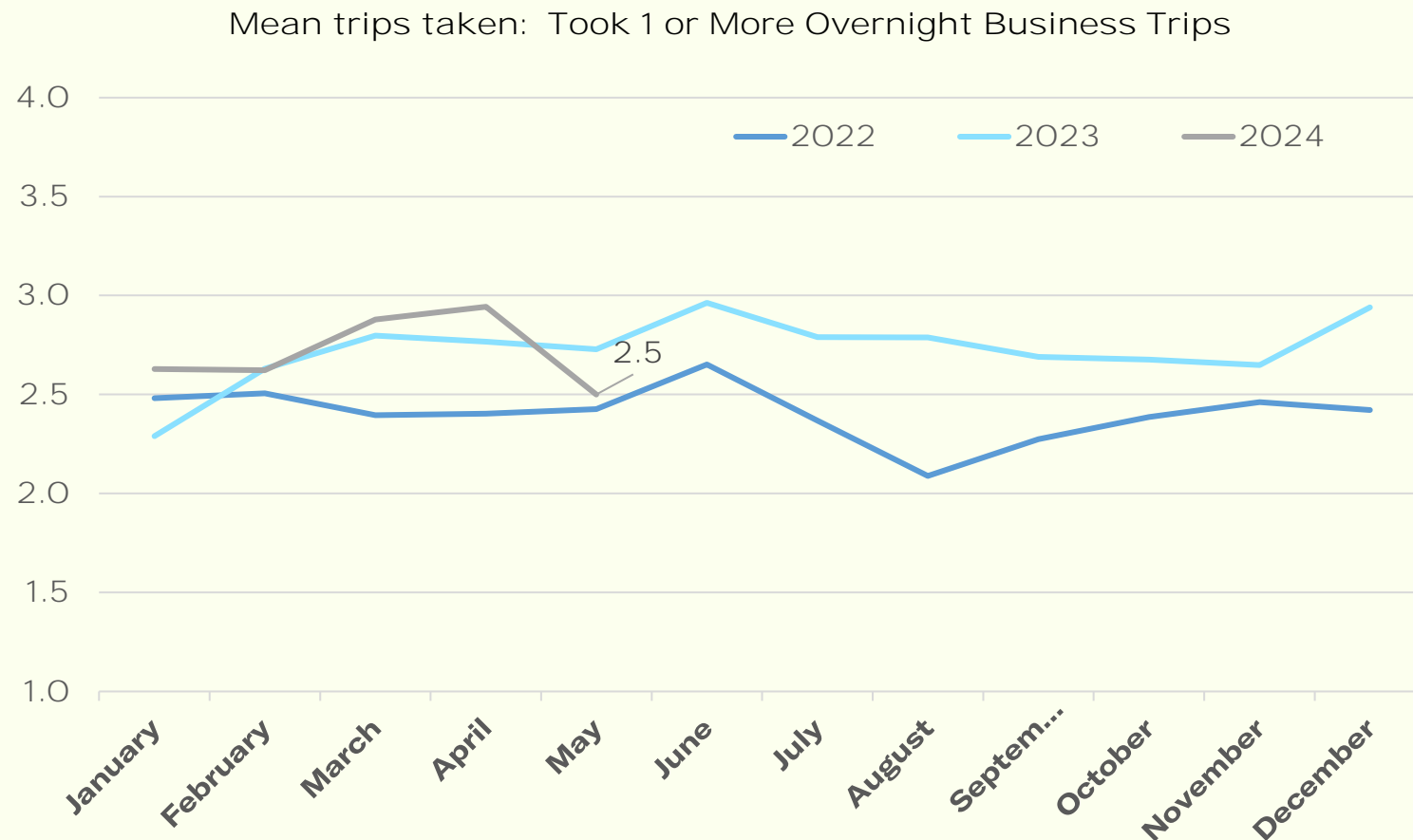


Percent of All Travelers Taking Business Trips



The average number of overnight business trips taken was down in May.

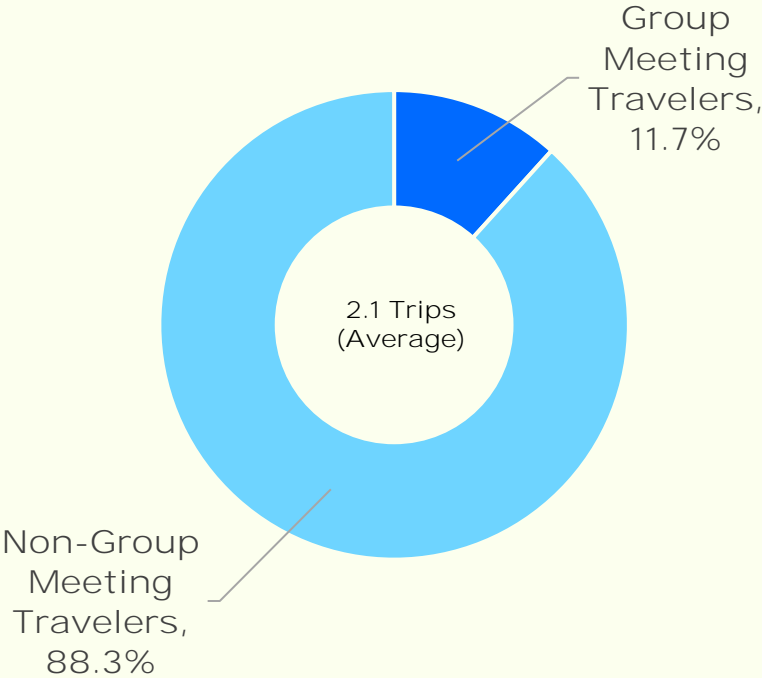
Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)



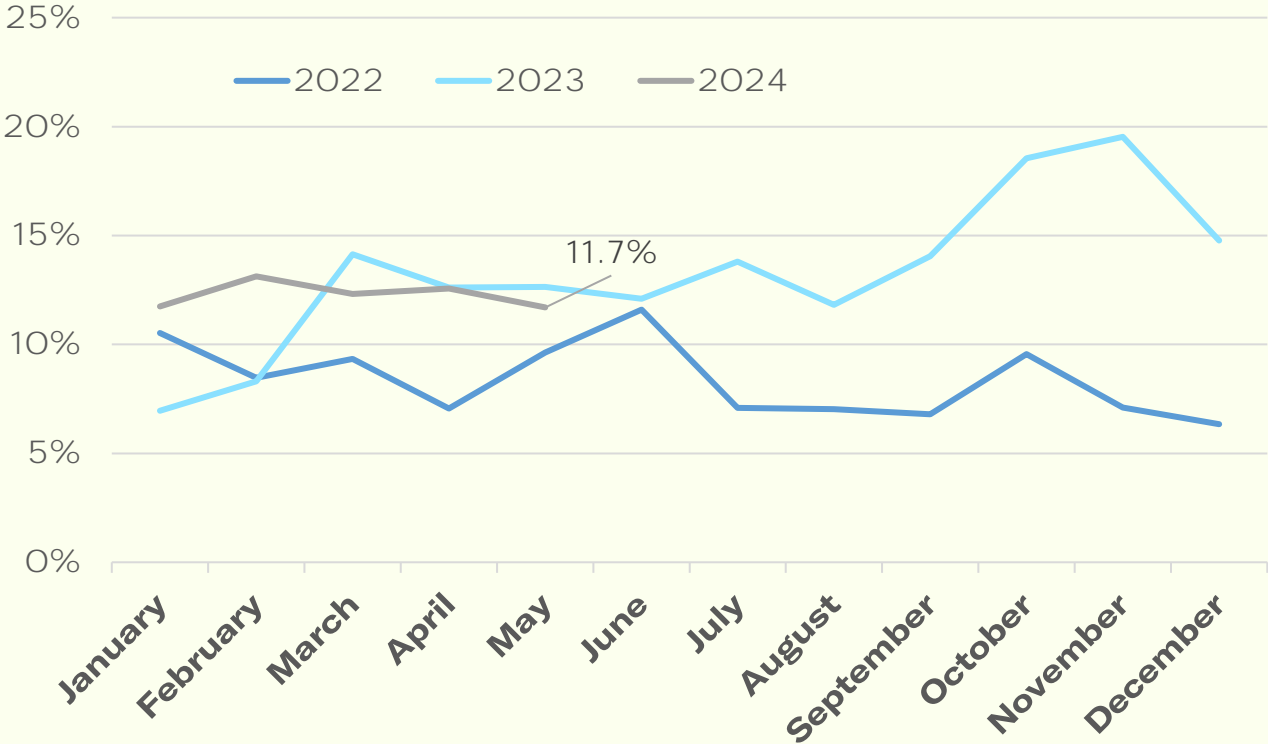
Overnight group meetings travel followed a similar pattern

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

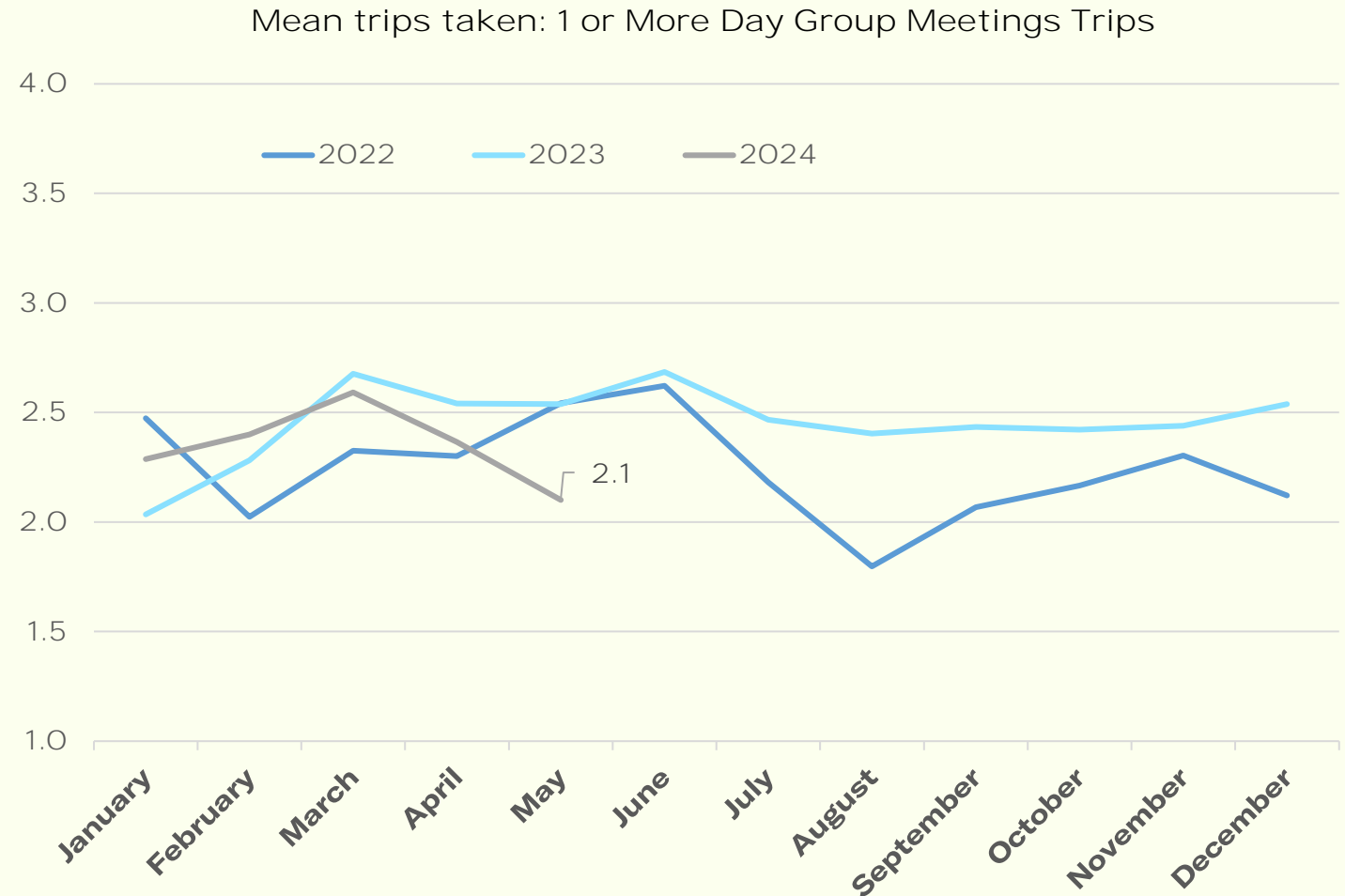


Percent of All Travelers Taking Overnight Group Meetings Trips



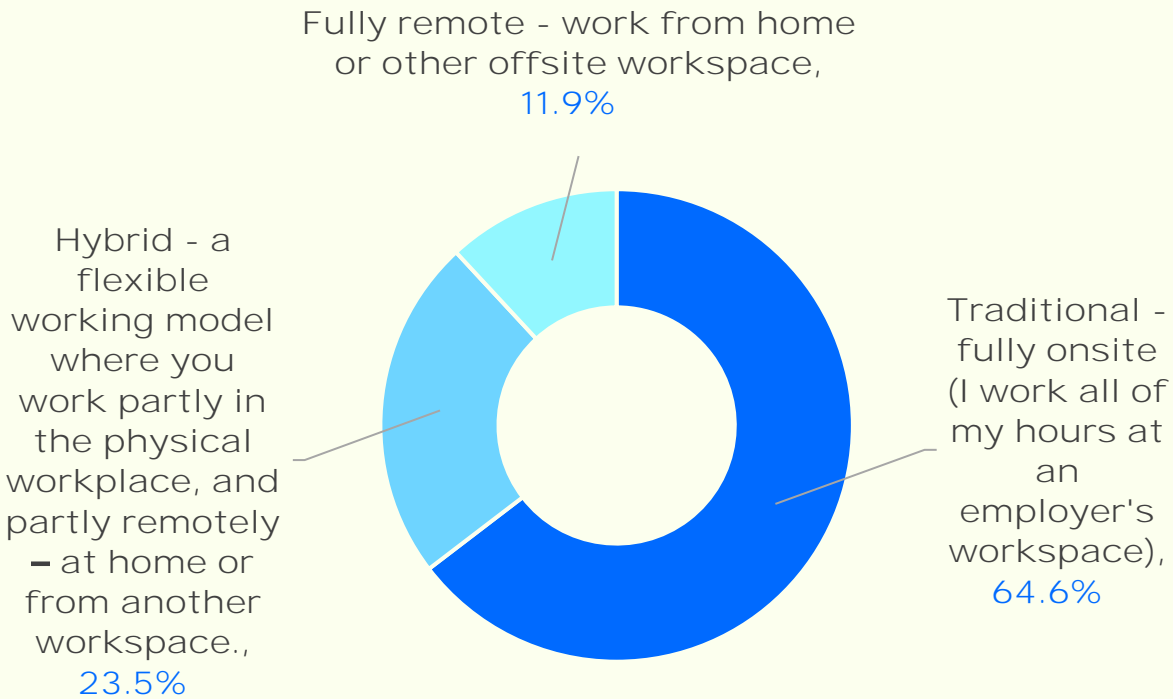
The average number of overnight group meeting trips taken was also down in May.

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



2-of-3 work in traditional work environments

Question: *Is your current working arrangement hybrid or remote or traditional?*



Digital Influencers

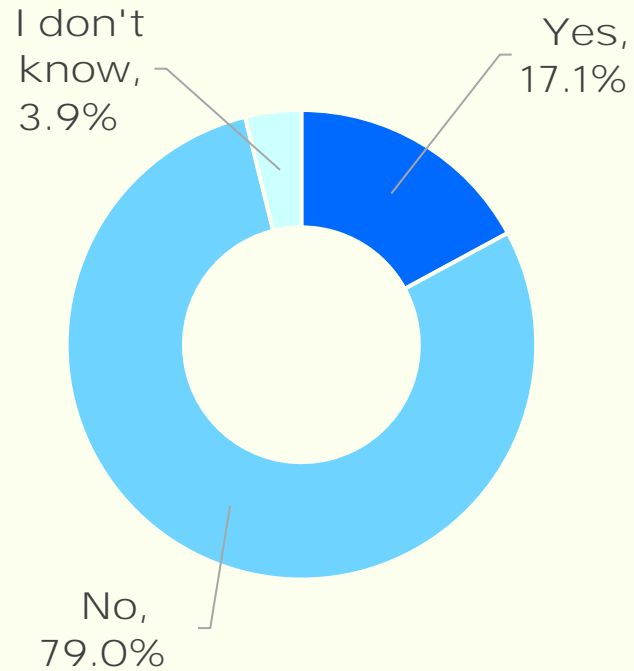


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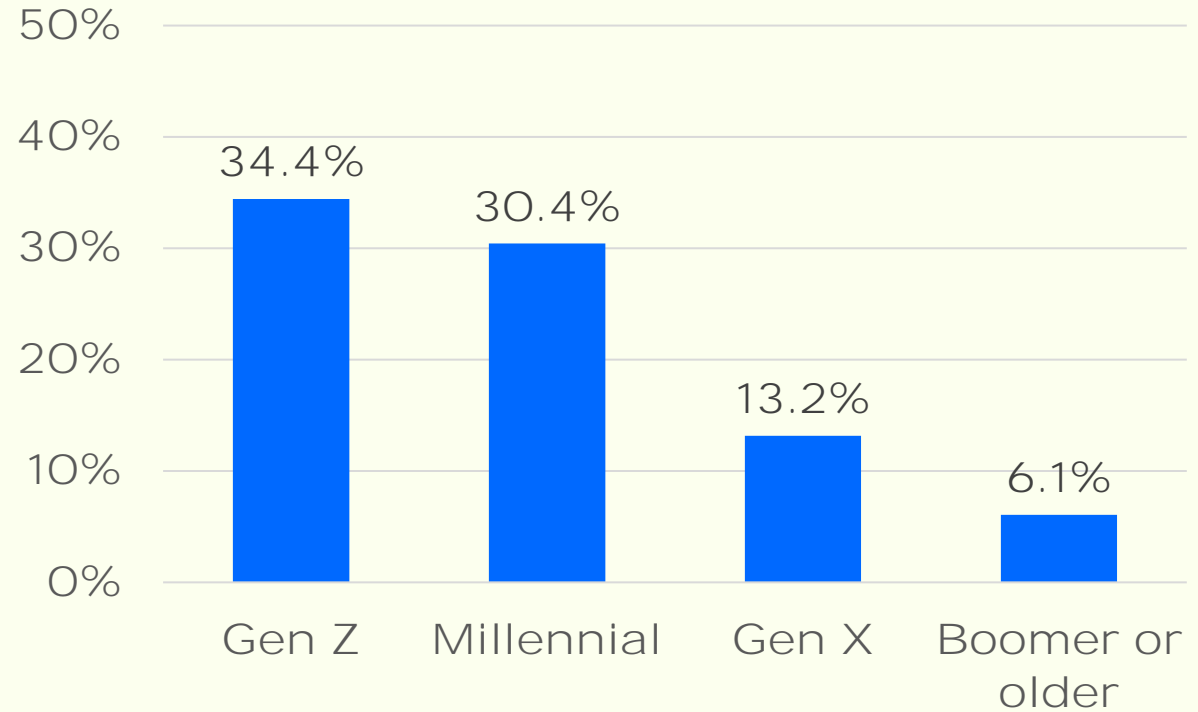


Approximately 1-in-5 travelers use digital influencers to help plan their trips.

Used a Digital Influencer
(past 12 months)



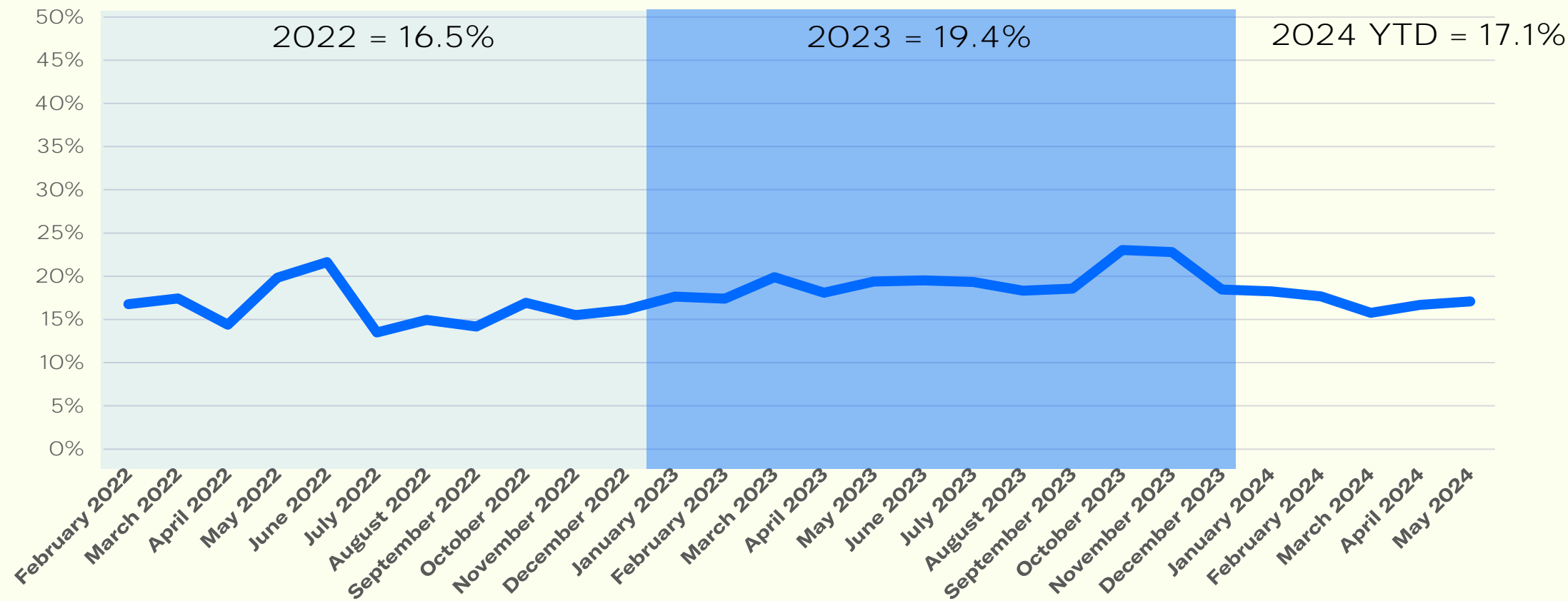
By Generation



Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?

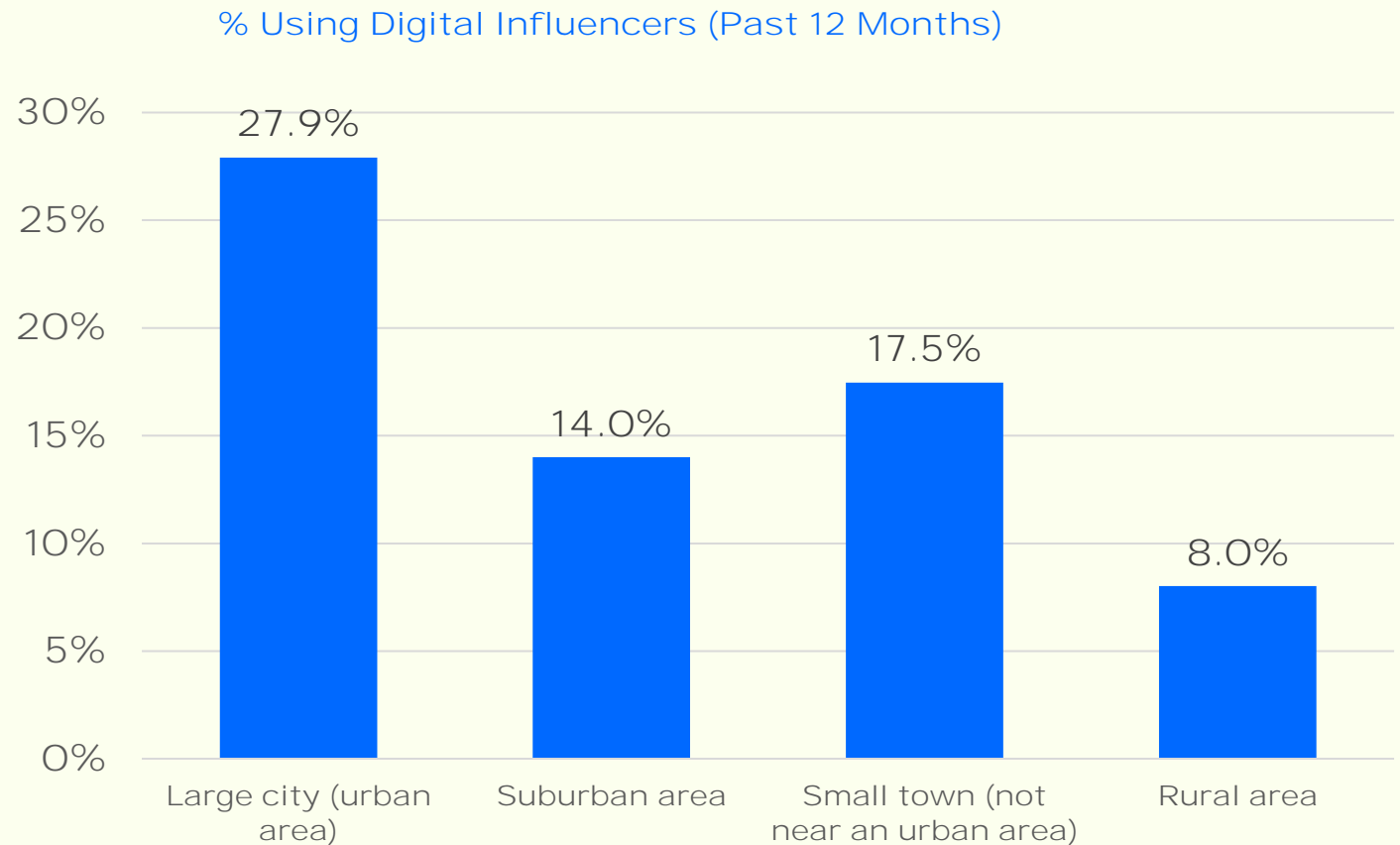
Use of digital influencers increased slightly last year.

Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?



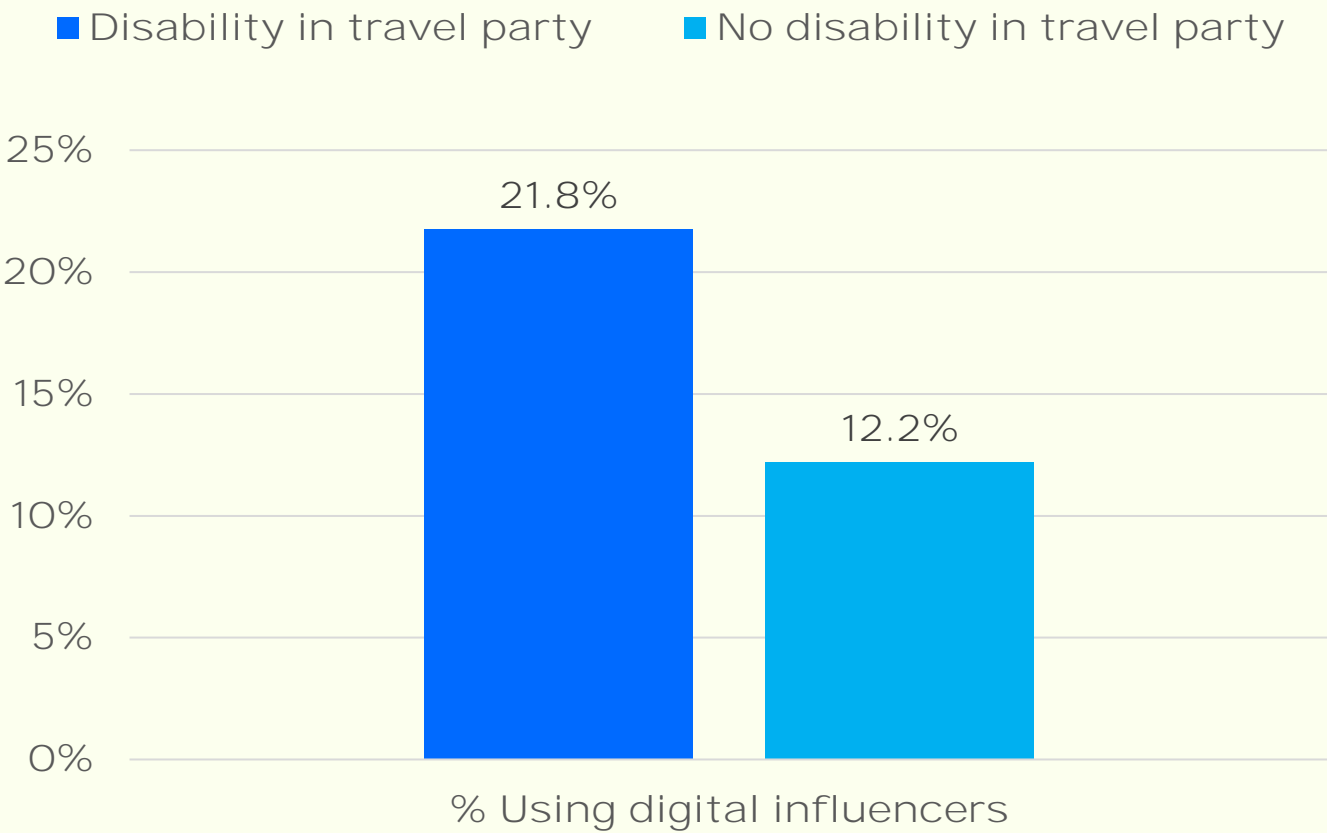
Urbanites are the most likely to use digital influencers.

Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?



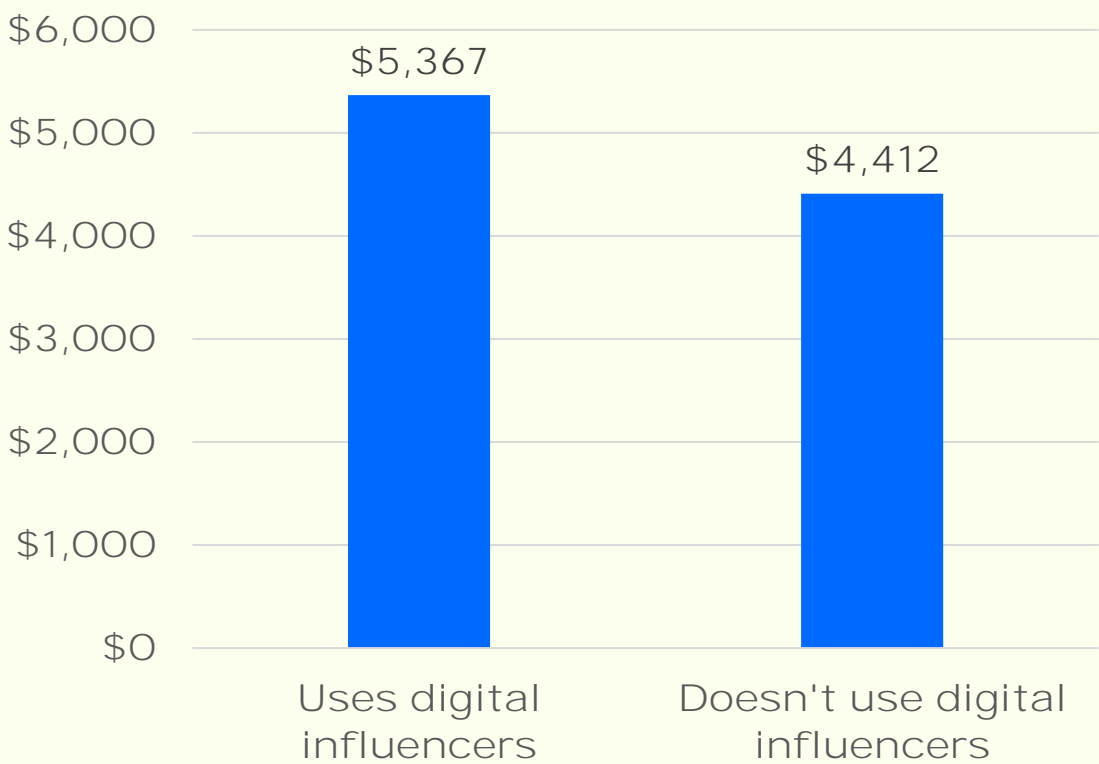
They're more likely to have accessibility concerns.

Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?

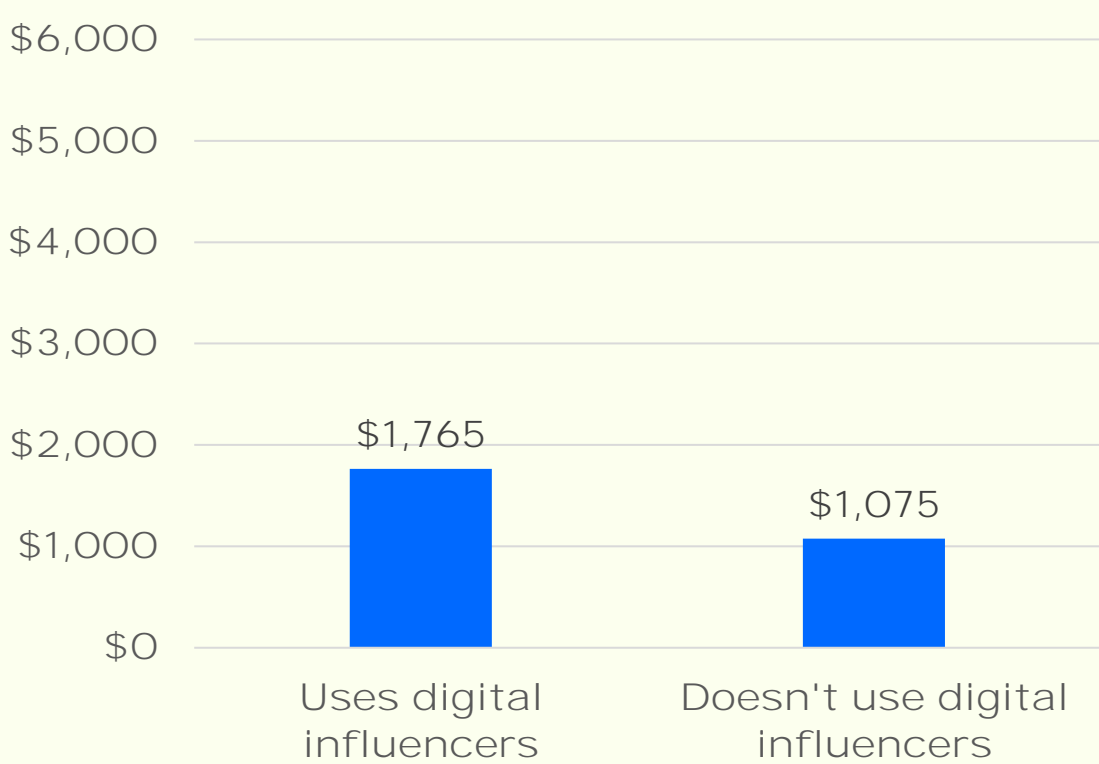


Digital influencer users are big spenders on travel.

Question: How much IN TOTAL is the maximum you will spend on leisure travel during the NEXT 12 MONTHS?



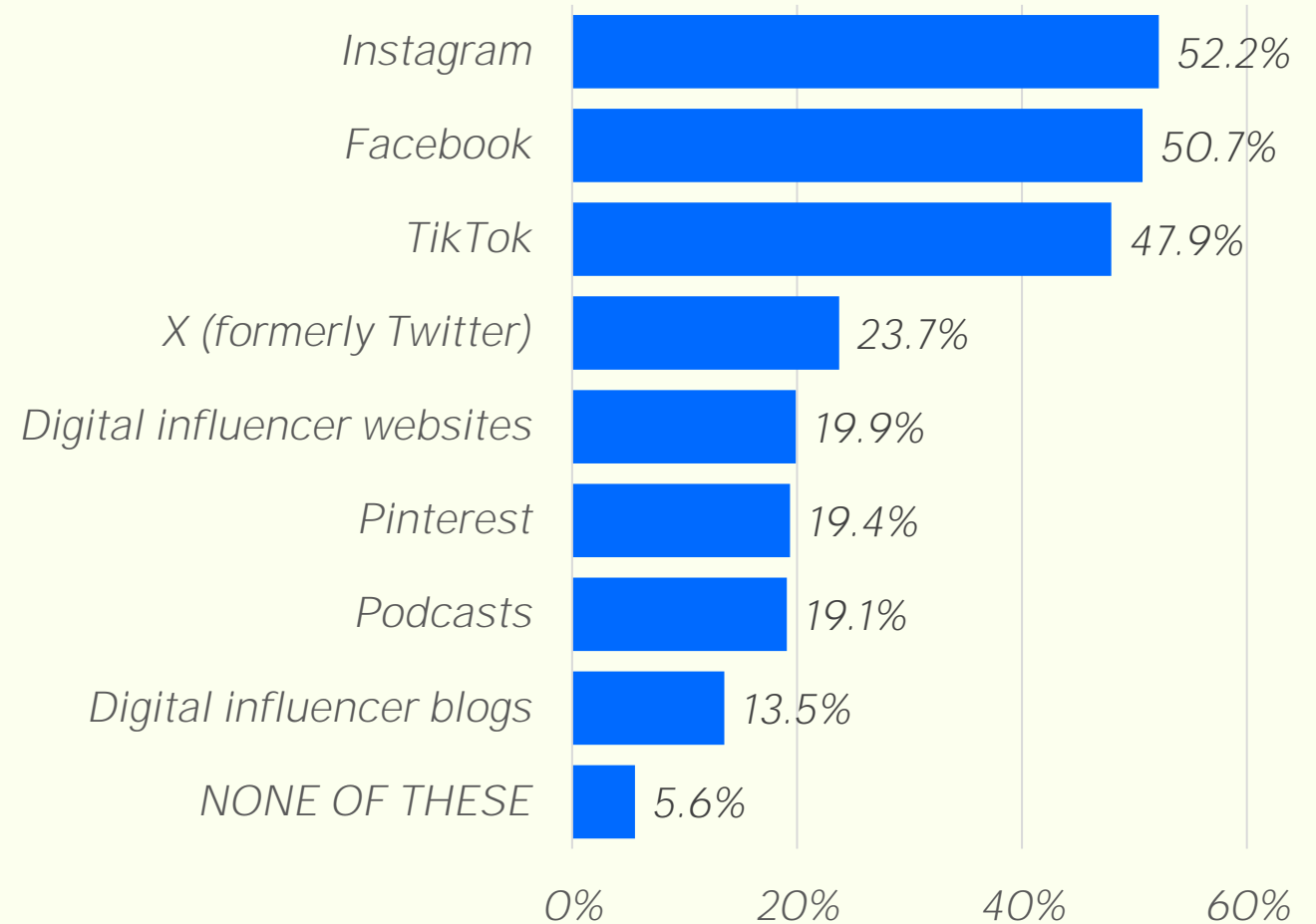
Question: How much IN TOTAL did you spend for each of the following on your most recent overnight trip?



Instagram, Facebook and Tiktok doiminate the landscape of digital influencer usage.

Question:

In which of these formats do you watch or read content from DIGITAL INFLUENCERS? (Select all that apply)



Our Research Services

Visitor & Target Audience Profiles

Audience Persona Identification

Visitor Activity Analysis & Segmentation

Brand Performance

Resident + Stakeholder Research

Advertising Testing & ROI

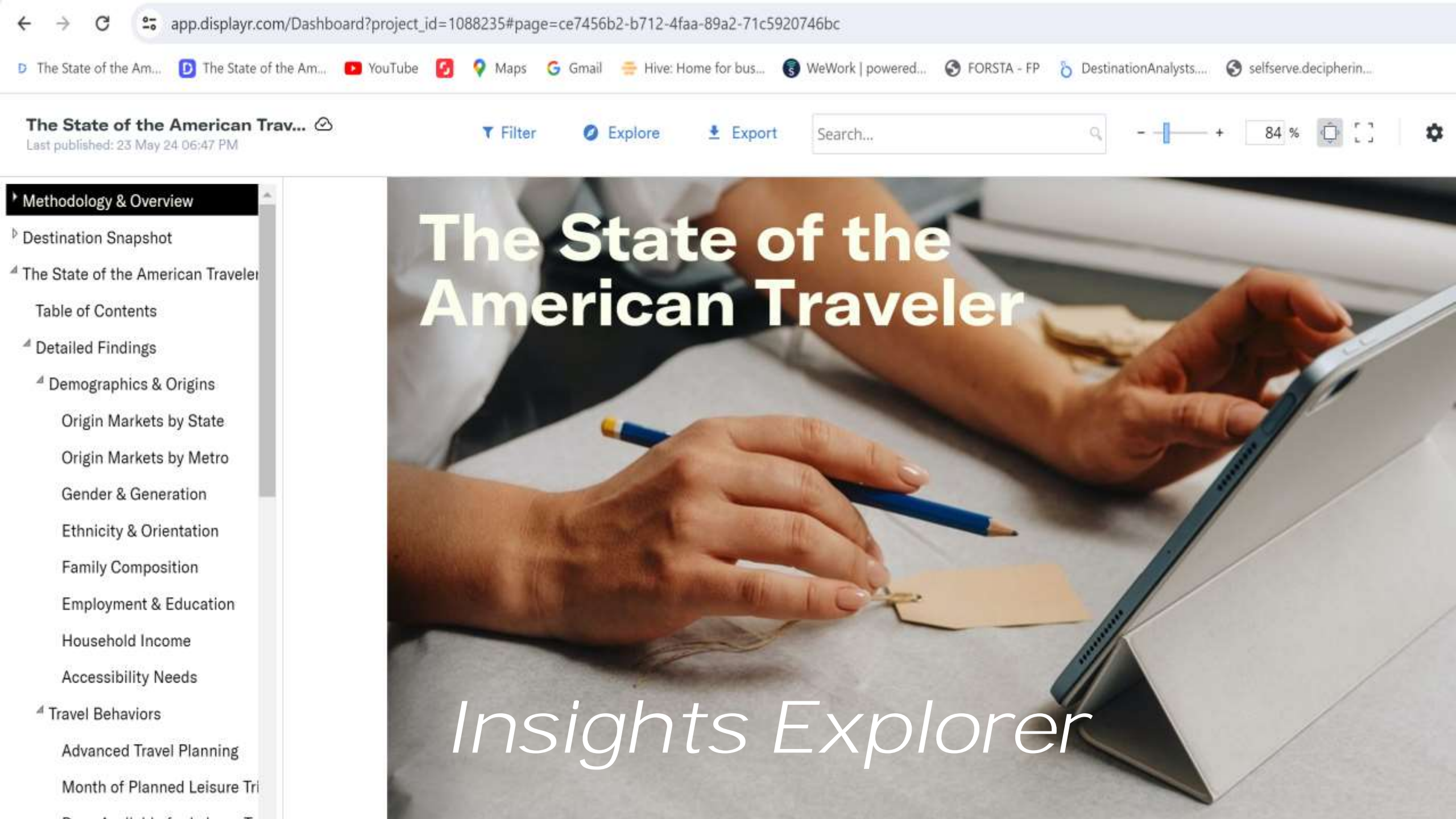
Hotel & Attractions Research



Future Partners



The American Luxury
Traveler



Methodology & Overview

Destination Snapshot

The State of the American Traveler

Table of Contents

Detailed Findings

Demographics & Origins

Origin Markets by State

Origin Markets by Metro

Gender & Generation

Ethnicity & Orientation

Family Composition

Employment & Education

Household Income

Accessibility Needs

Travel Behaviors

Advanced Travel Planning

Month of Planned Leisure Tri

The State of the American Traveler

Insights Explorer

Methodology & Overview

Destination Snapshot

The State of the American Traveler

Table of Contents

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Demographics & Origins

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Travel Sentiment

Marketing Metrics

Key Metrics: Time Series

The State of the American Traveler+

Dashboard User Guide

Origin Markets by State

Out-of-State Recent Visitors to Indiana (Past 12 Months)

Year

2024 YTD

Insights Explorer

States

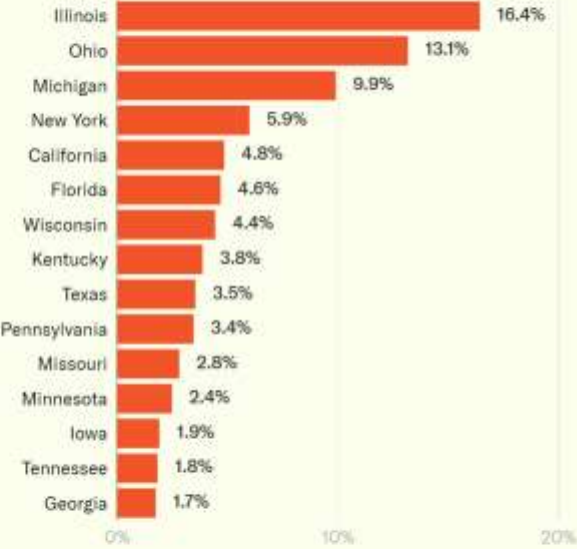
Filters

Indiana

Out-of-State

Recent Visitors

Origin Market by State



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The State of the American Traveler

Question: In which state do you currently live in?

Base: Out-of-State Recent Visitors to Indiana (Past 12 Months), 2024 YTD respondents. 1,440 completed surveys.

Travel Behaviors

- Advanced Travel Planning
- Month of Planned Leisure Trips
- Days Available for Leisure Trips
- Trips Taken in the Past Two Years
- Paid Accommodations Used
- Sporting Event Travel
- Event & Festival Travel
- Booking Websites Used**
- Hotel Brands / Reward Programs
- Air Travel / Airports Used
- Airline Brands / Reward Programs
- Credit Cards Held / Rewards Programs
- Cruise Travel / Cruise Lines Used
- Pet Travel

Booking Websites Used

Recent Visitors to Boston, MA (Past 12 Months)

Year

2024 YTD

Insights Explorer

Cities

Filters

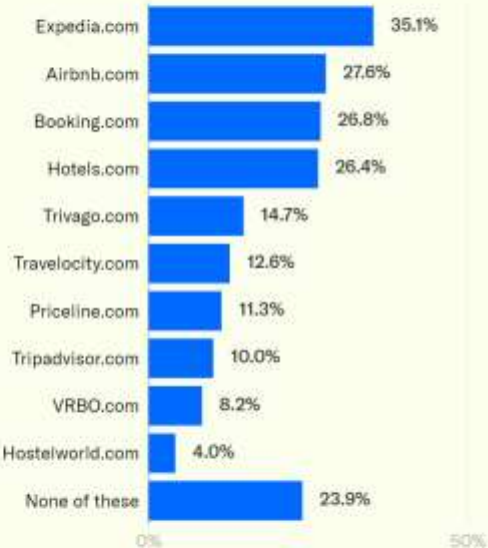
Boston, MA

(All)

Recent Visitors

Travel Booking Websites Used

(Past 12 Months)



Travel Booking Website Rewards Programs



Future Partners

The State of the American Traveler

Question 1: In the PAST 12 MONTHS, which of these websites do you recall using to book any travel lodging?
Question 2: Which of these BOOKING WEBSITE REWARDS PROGRAMS do you currently use? (Select all that apply)

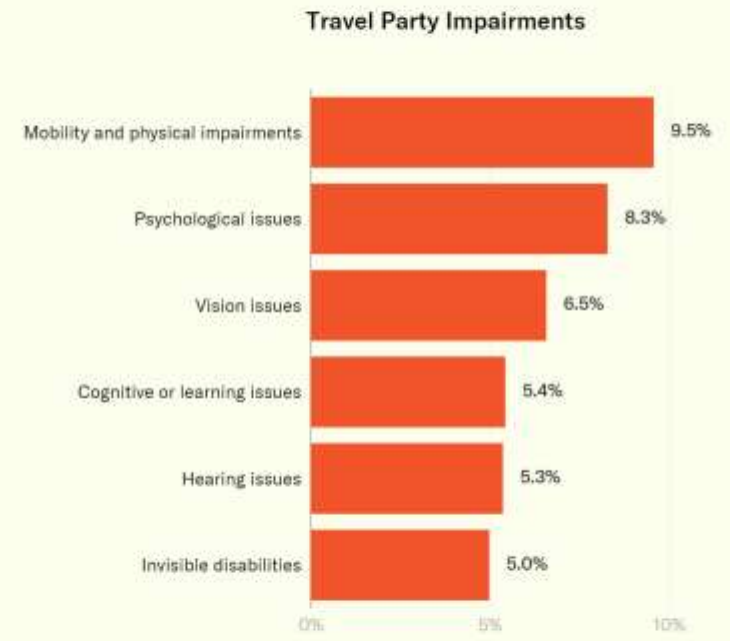
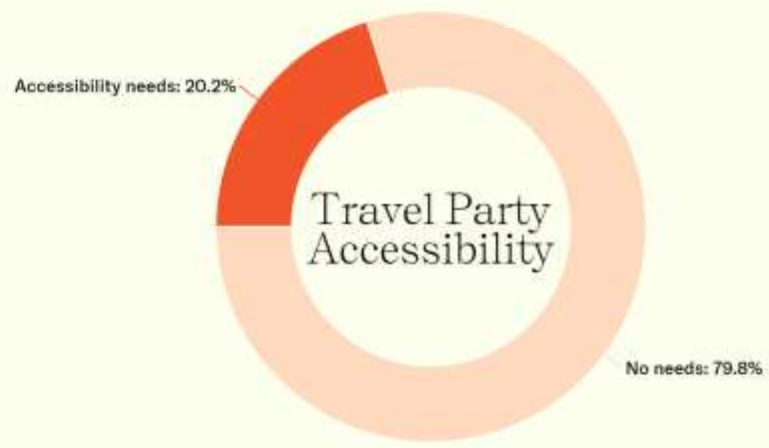
Base: Recent Visitors to Boston, MA (Past 12 Months), 2024 YTD respondents. 1,062 completed surveys.

- The State of the American Traveler
 - Table of Contents
 - Detailed Findings
 - Demographics & Origins
 - Origin Markets by State
 - Origin Markets by Metro
 - Gender & Generation
 - Ethnicity & Orientation
 - Family Composition
 - Employment & Education
 - Household Income
 - Accessibility Needs
 - Travel Behaviors
 - Advanced Travel Planning
 - Month of Planned Leisure Trips
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 - Trips Taken in the Past Two Years
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 - Event & Festival Travel

Accessibility Needs

Recent Visitors to Baltimore, MD (Past 12 Months)

Year: 2024 YTD Insights Explorer: Cities Filters: Baltimore, MD (All) Recent Visitors



Question 1: Because of a physical, mental or emotional issue do you (or anyone you regularly travel with) have difficulties or face challenges traveling?
Question 2: Which best describe the issues that cause you (or anyone you regularly travel with) to have difficulties or challenges while traveling? (Select all that apply)
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Base: Recent Visitors to Baltimore, MD (Past 12 Months), 2024 YTD respondents, 715 completed surveys.

Credit Cards held / Rewards

Cruise Travel / Cruise Lines I

Pet Travel

Travel Sentiment

Marketing Metrics

Travel Planning Resources U

Most Effective Travel Plannir

Online Travel Planning Resou

Offline Travel Planning Resou

Official Tourism Office Resou

Travel Planning Actions in th

Top Travel Passions & Hobbie

Social Media Platforms Usec

Streaming Services Subscrib

Podcasts Used / Genres

News Sources Used

Magazines Read

Key Metrics: Time Series

The State of the American Traveler

Dashboard User Guide

Top Travel Passions & Hobbies

Recent Visitors to Hilton Head, SC (Past Two Years)

Year

2023

Insights Explorer

Coastal & Beach Destinations

Filters

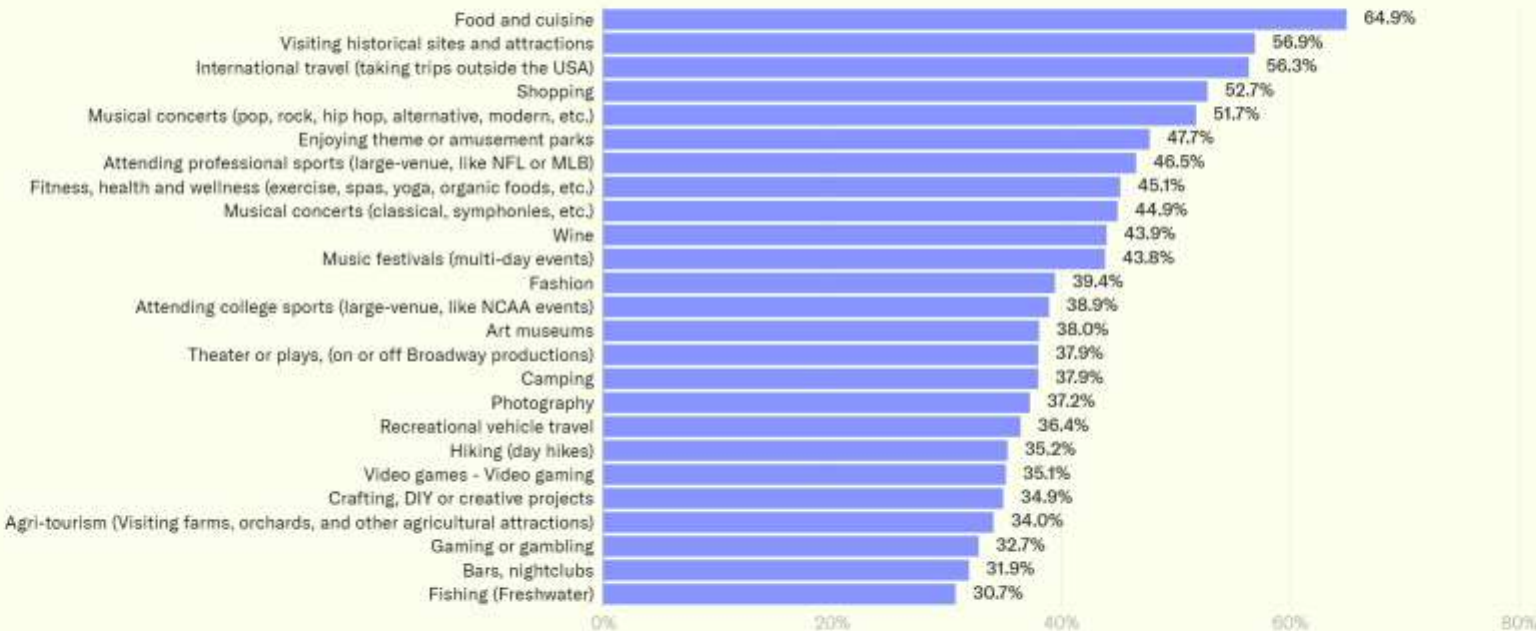
Hilton Head, SC

Total

Recent Visitors

Top Travel Passions & Hobbies

(Top 2 Box - % selecting "Extremely high interest" or "High interest")



Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

Base: Recent Visitors to Hilton Head, SC (Past Two Years), 2023 respondents. 2,616 completed surveys.

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The State of the American Traveler

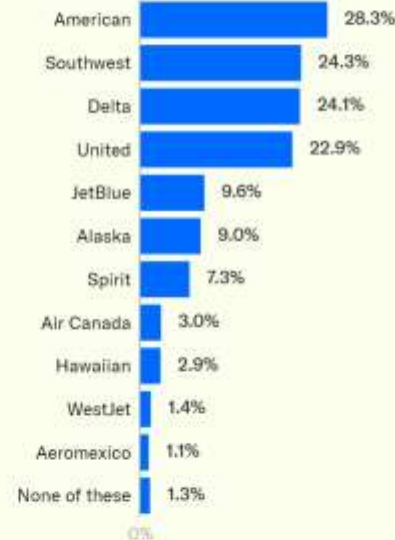
- Advanced Travel Planning
- Month of Planned Leisure Trips
- Days Available for Leisure Trips
- Trips Taken in the Past Two Years
- Paid Accommodations Used
- Sporting Event Travel
- Event & Festival Travel
- Booking Websites Used
- Hotel Brands / Reward Programs
- Air Travel / Airports Used
- Airline Brands / Reward Programs**
- Credit Cards Held / Rewards Programs
- Cruise Travel / Cruise Lines Used
- Pet Travel

Airline Brands / Reward Programs

Likely Visitors to Napa Valley, CA (Next 12 Months)

Year: 2024 YTD
Insights Explorer: Wine Country Regions
Filters: Napa Valley, CA
Total: Likely Visitors

Airline Brands Used
(Past 12 Months)



Airline Rewards Programs



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The State of the American Traveler

Question 1: Which of these airlines have you flown on in the PAST 12 MONTHS? (Select all that apply)
Question 2: Which of these AIRLINE REWARDS PROGRAMS do you currently use? (Select all that apply)

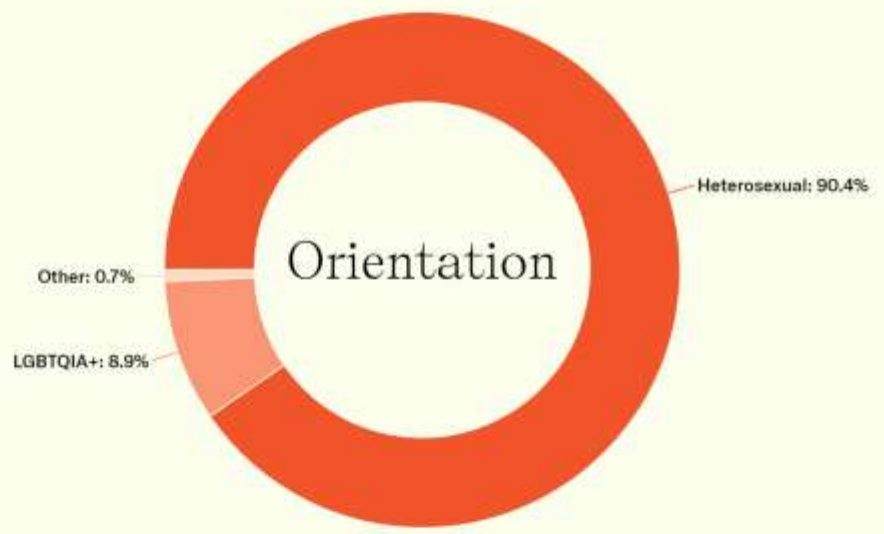
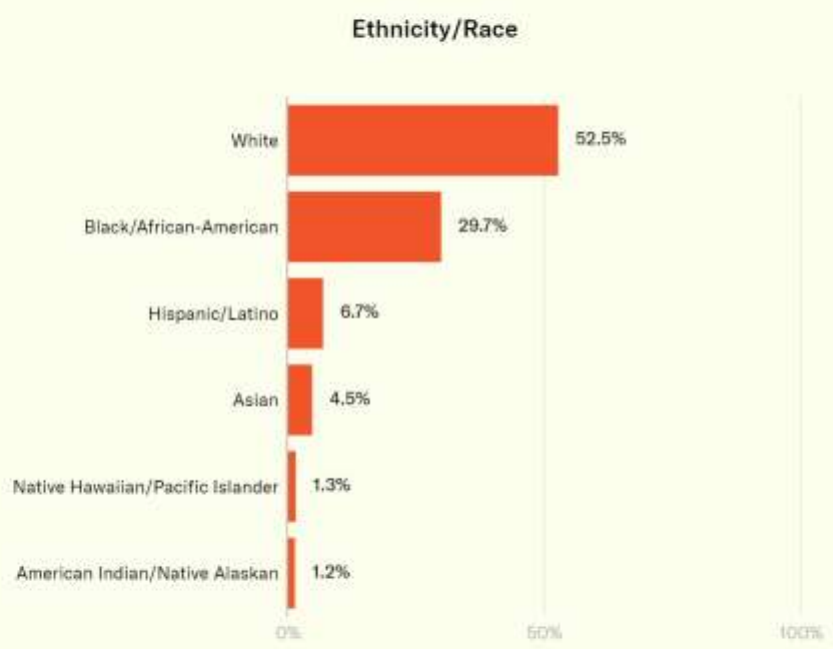
Base: Likely Visitors to Napa Valley, CA (Next 12 Months), 2024 YTD respondents: 1,717 completed surveys.

- The State of the American Traveler
 - Table of Contents
 - Detailed Findings
 - Demographics & Origins
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 - Ethnicity & Orientation**
 - Family Composition
 - Employment & Education
 - Household Income
 - Accessibility Needs
 - Travel Behaviors
 - Advanced Travel Planning
 - Month of Planned Leisure Tri
 - Days Available for Leisure Tr
 - Trips Taken in the Past Two Y
 - Paid Accommodations Used
 - Sporting Event Travel
 - Event & Festival Travel

Ethnicity & Orientation

Likely Visitors to Jamaica (Next 12 Months)

Year: 2024 YTD Insights Explorer: Islands Filters: Jamaica
Total Likely Visitors



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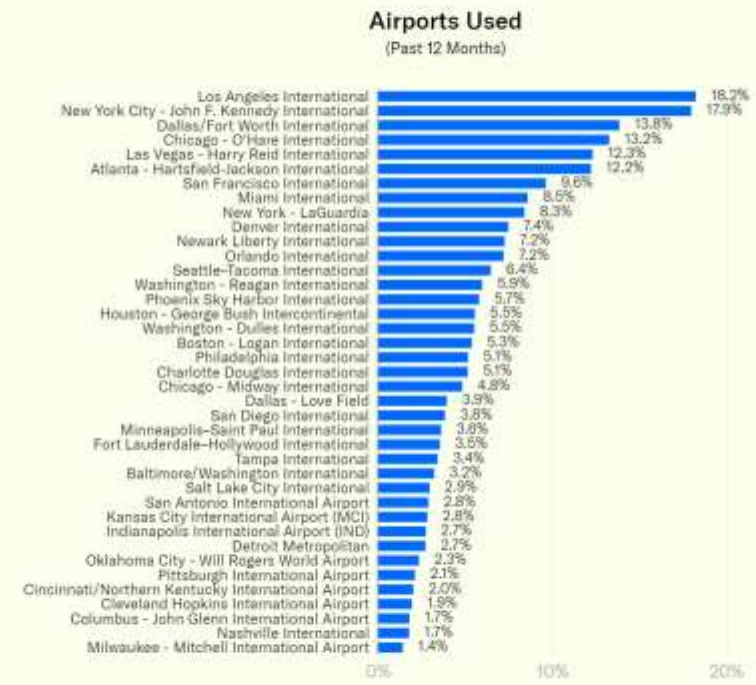
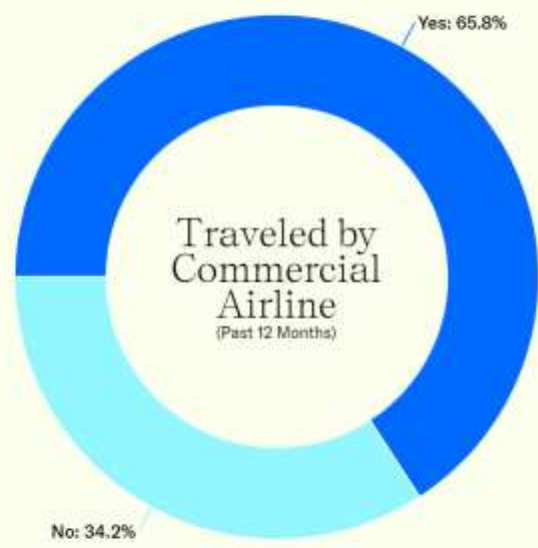
Question 1: Which best describes your ethnicity?
Question 2: Do you consider yourself? (Select one)
Base: Likely Visitors to Jamaica (Next 12 Months), 2024 YTD respondents, 1,445 completed surveys.

- Methodology & Overview
- Destination Snapshot
- The State of the American Traveler
 - Table of Contents
 - Detailed Findings
 - Demographics & Origins
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 - Advanced Travel Planning
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 - Event & Festival Travel
 - Booking Websites Used
 - Hotel Brands / Reward Programs
 - Air Travel / Airports Used**
 - Airline Brands / Reward Programs
 - Credit Cards Held / Rewards
 - Cruise Travel / Cruise Lines

Air Travel / Airports Used

Likely Visitors to Japan (Next 12 Months)

Year: 2024 YTD Insights Explorer: International Countries Filters: Japan Likely Visitors



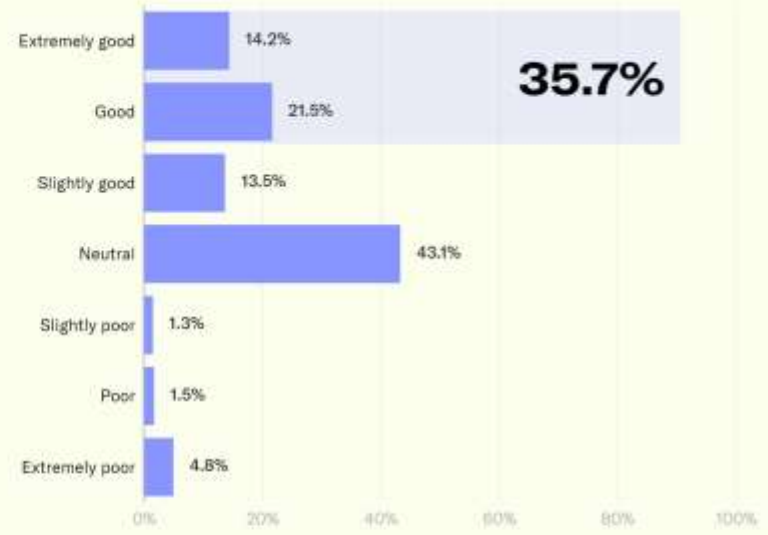
Question 1: In the PAST 12 MONTHS, have you traveled for any reason on a commercial airline?
Question 2: In the PAST 12 MONTHS, which of these airports have you used? (Select any airport you originated in, traveled through or into)
Base: Likely Visitors to Japan (Next 12 Months), 2024 YTD respondents. 1,523 completed surveys.

- Destination Perceptions
 - Destination Attribute Ratings
 - Destination Attributes**
 - Destination Grades
 - Destination Popularity
 - Destination Familiarity
 - Destination Uniqueness
 - Motivation to Visit
 - Likelihood to Visit
 - Recent Visitation (Past Two Years)
 - Advertising Recall
 - Word-of-Mouth Recall
 - Earned Media Recall
 - Destination Appeal
 - Appeal as a Place to Live
 - Appeal as a Meetings Destination
 - Travel Accessibility
 - Welcoming Atmosphere
 - Travel Deterrents
- Time Series: Key Metrics

Destination Attributes

Anaheim-Orange County, 2024 YTD

Rating of "Family friendly" for Anaheim-Orange County



Destination Attribute

Family friendly

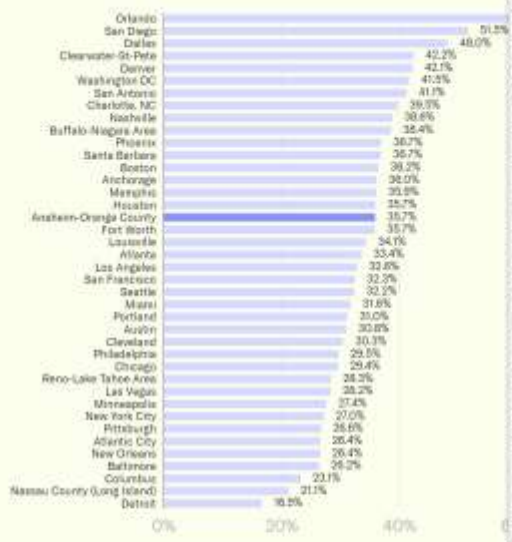
Base: Anaheim-Orange County set, 2024 YTD respondents, 325 completed surveys.

Future Partners

The State of the American Traveler

Cities Ranked, 2024

(Top 2 Box - % Rating the Destination "Good" or "Extremely")



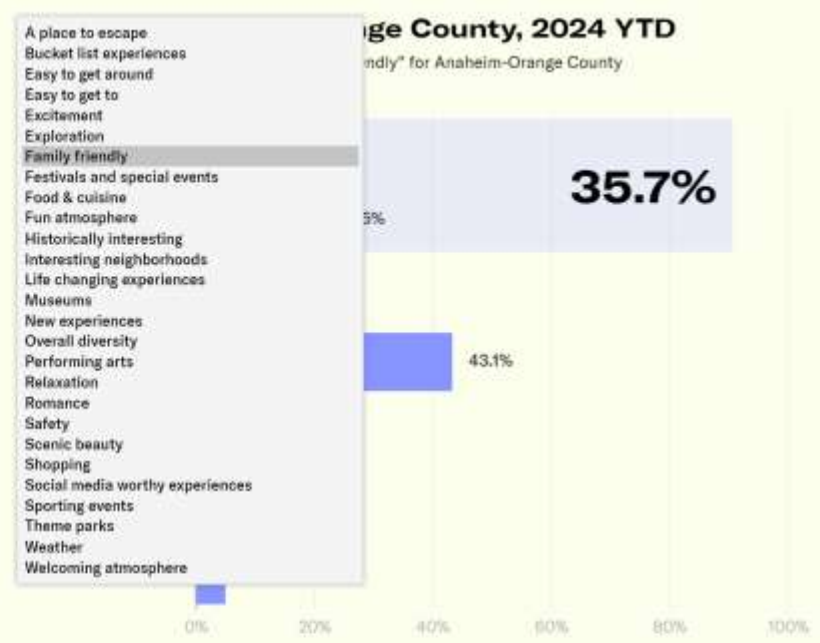
Base: Total respondents

- Year: 2024 YTD
Destination Type: Cities
Destination: Anaheim-Orange County
- Anaheim-Orange County
 - Anchorage
 - Atlanta
 - Atlantic City
 - Austin
 - Baltimore
 - Boston
 - Buffalo-Niagara Area
 - Charlotte, NC
 - Chicago
 - Clearwater-St. Pete
 - Cleveland
 - Columbus
 - Dallas
 - Denver
 - Detroit
 - Fort Worth
 - Houston
 - Las Vegas
 - Los Angeles
 - Louisville
 - Memphis
 - Miami
 - Minneapolis
 - Nashville
 - Nassau County (Long Island)
 - New Orleans
 - New York City
 - Orlando
 - Philadelphia
 - Phoenix
 - Pittsburgh
 - Portland
 - Reno-Lake Tahoe Area
 - San Antonio
 - San Diego
 - San Francisco
 - Santa Barbara
 - Seattle
 - Washington DC

Question: Please think about Anaheim-Orange County as a place to visit for leisure. Given what you currently know about it, please rate the destination for each of these attributes.

- Destination Perceptions
 - Destination Attribute Ratings
 - Destination Attributes**
 - Destination Grades
 - Destination Popularity
 - Destination Familiarity
 - Destination Uniqueness
- Motivation to Visit
- Likelihood to Visit
- Recent Visitation (Past Two Years)
- Advertising Recall
- Word-of-Mouth Recall
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- Destination Appeal
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Destination Attributes



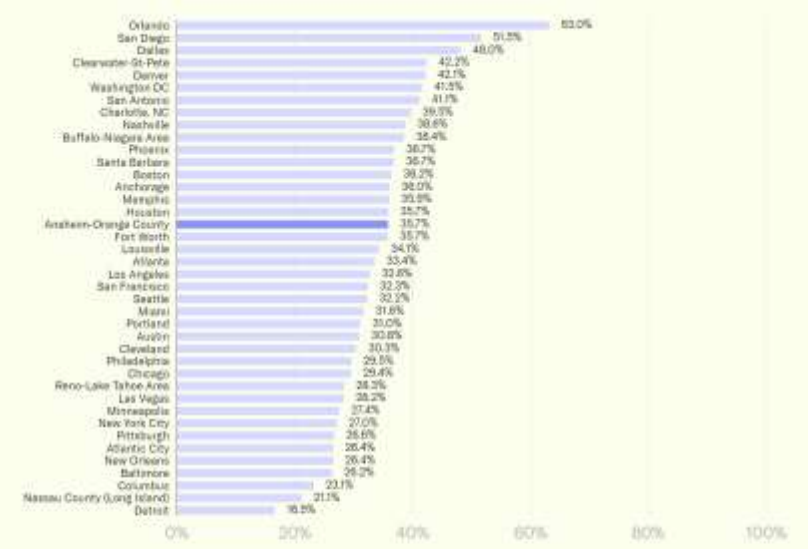
Base: Anaheim-Orange County set, 2024 YTD respondents, 325 completed surveys.

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Year: 2024 YTD
Destination Type: Cities
Destination: Anaheim-Orange County

Cities Ranked, 2024 YTD

(Top 2 Box - % Rating the Destination "Good" or "Extremely good" for: Family friendly)



Base: Total respondents, 2024 YTD respondents, 33,504 completed surveys.

Question: Please think about Anaheim-Orange County as a place to visit for leisure. Given what you currently know about it, please rate the destination for each of these attributes.

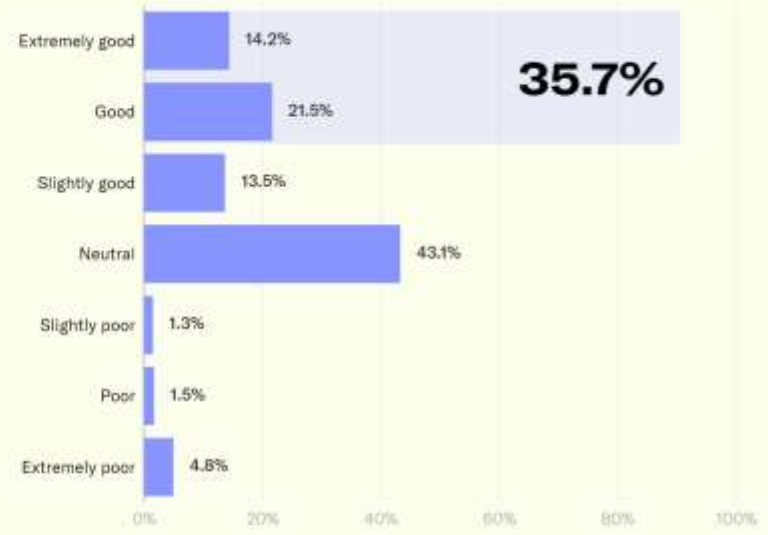
- Destination Perceptions
 - Destination Attribute Ratings
 - Destination Attributes**
 - Destination Grades
 - Destination Popularity
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Destination Attributes

Year: 2024 YTD
Destination Type: Cities
Destination: Anaheim-Orange County

Anaheim-Orange County, 2024 YTD

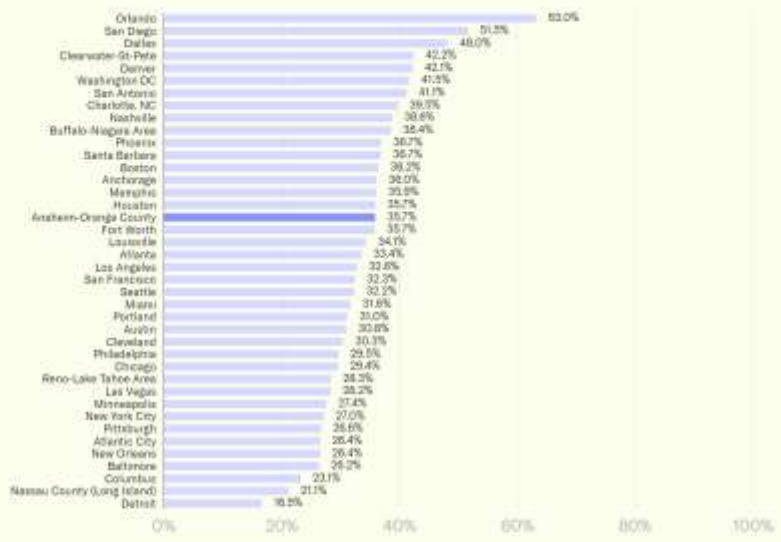
Rating of "Family friendly" for Anaheim-Orange County



Base: Anaheim-Orange County set, 2024 YTD respondents, 325 completed surveys.

Cities Ranked, 2024 YTD

(Top 2 Box - % Rating the Destination "Good" or "Extremely good" for: Family friendly)



Base: Total respondents, 2024 YTD respondents, 33,504 completed surveys.

Future Partners The State of the American Traveler

Question: Please think about Anaheim-Orange County as a place to visit for leisure. Given what you currently know about it, please rate the destination for each of these attributes.

Thank You!

*July Livestream
Registration*

