



# The State of the American Traveler

**Future Partners**

*April 2024*



# Future Partners

Opportunity  
powered by **insight.**

Presentation deck and recording will be available on our website:

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

*May Livestream  
Registration*



# Today's Agenda

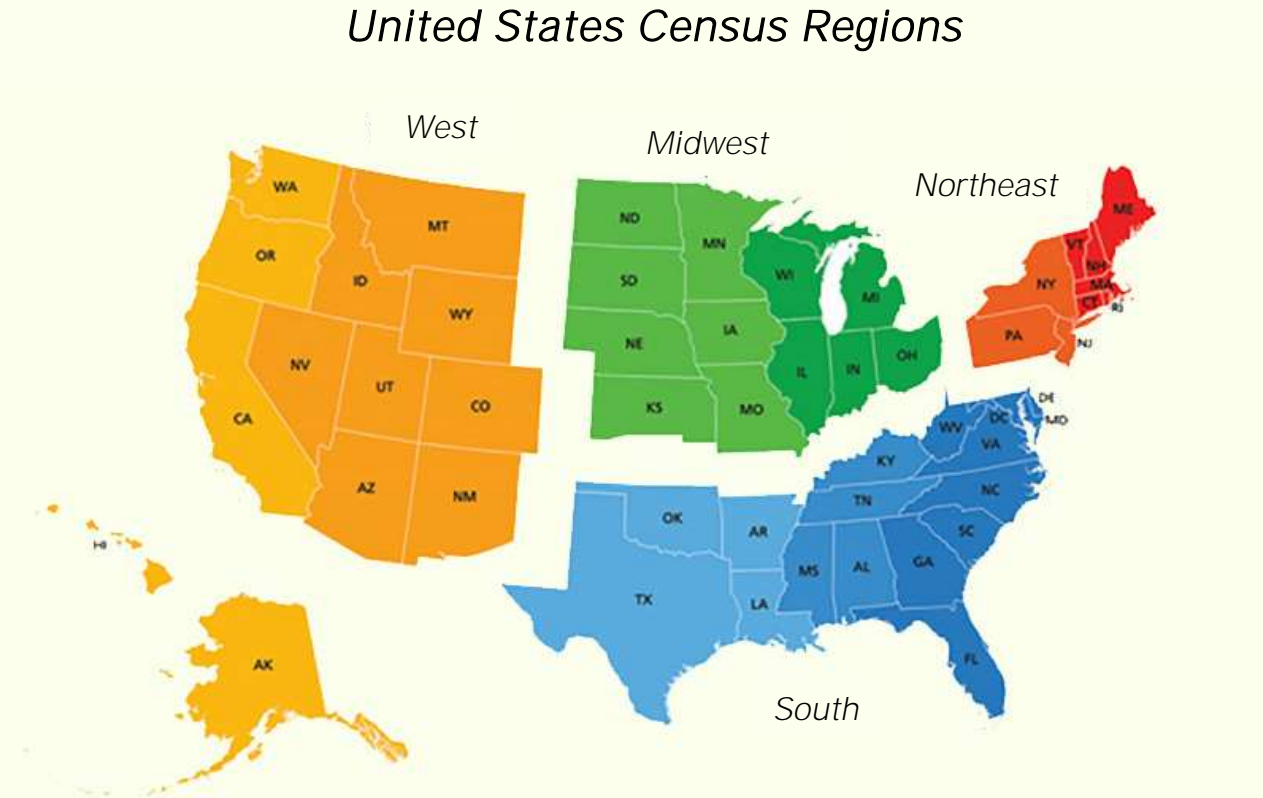
*May Livestream  
Registration*



- Travel Sentiment Overview
- What Family Travel Looks Like in 2024
- Family Travel Panel

# 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: [March 19-23](#)*
- *4,000+ fully completed surveys collected each wave*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



*May Livestream  
Registration*





# Current Sentiment

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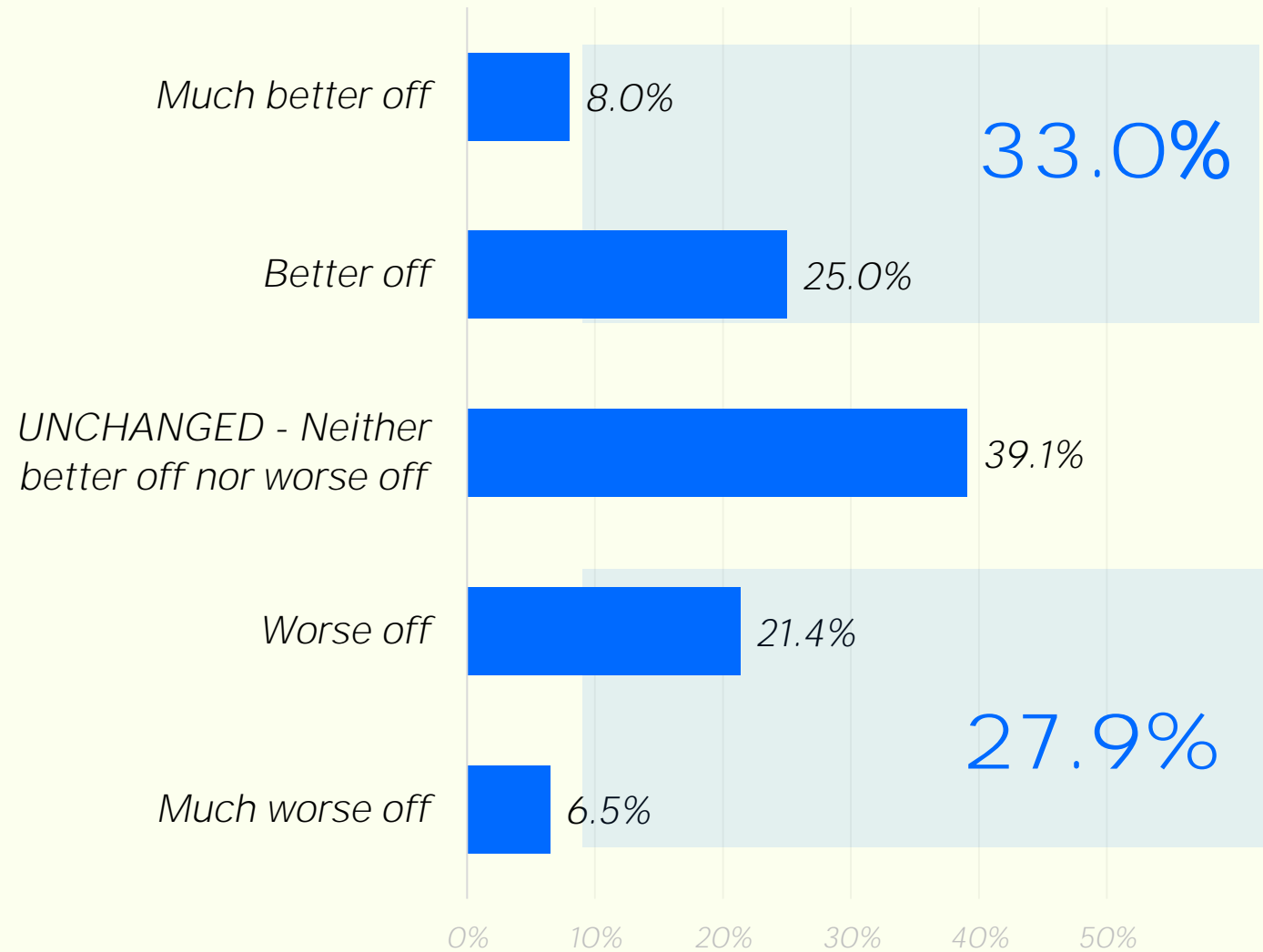
Positive Shift: Travelers report a small but continuing sense of improvement in financial well-being.



# 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?*

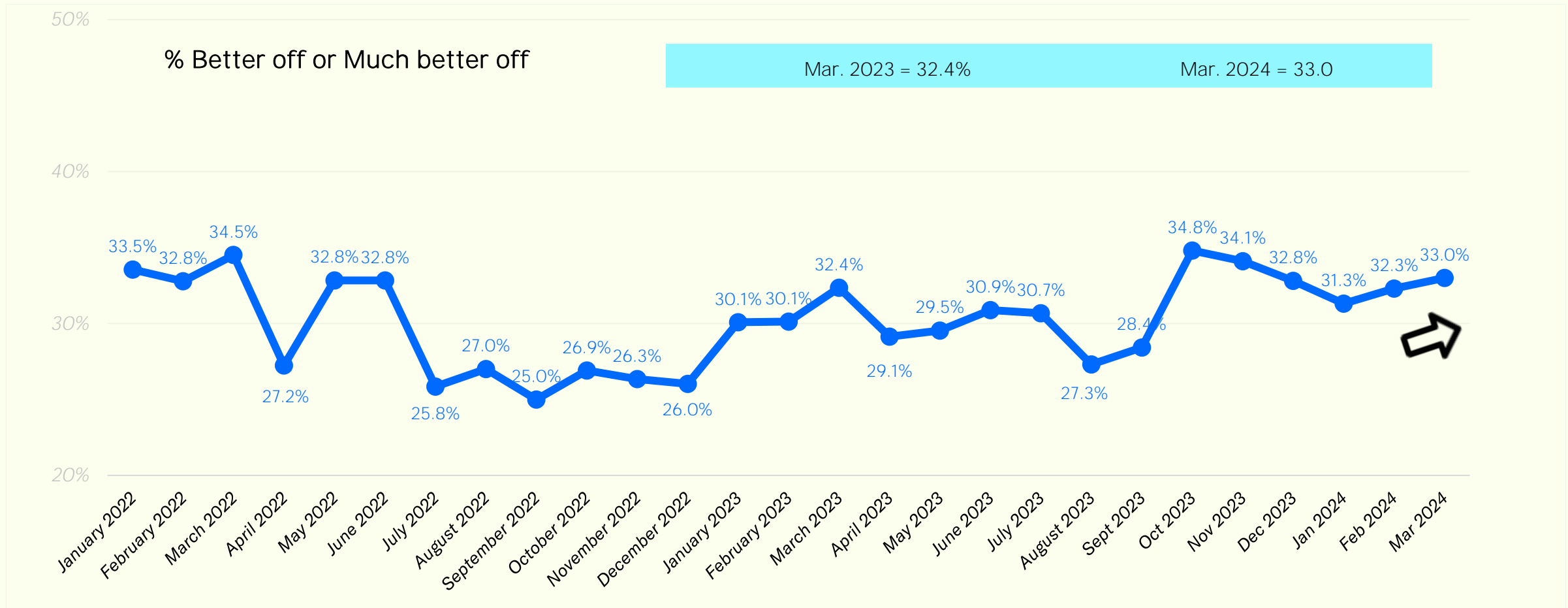




# Positive momentum: Increase seen in proportion of travelers feeling “Better off financially.”

Question:

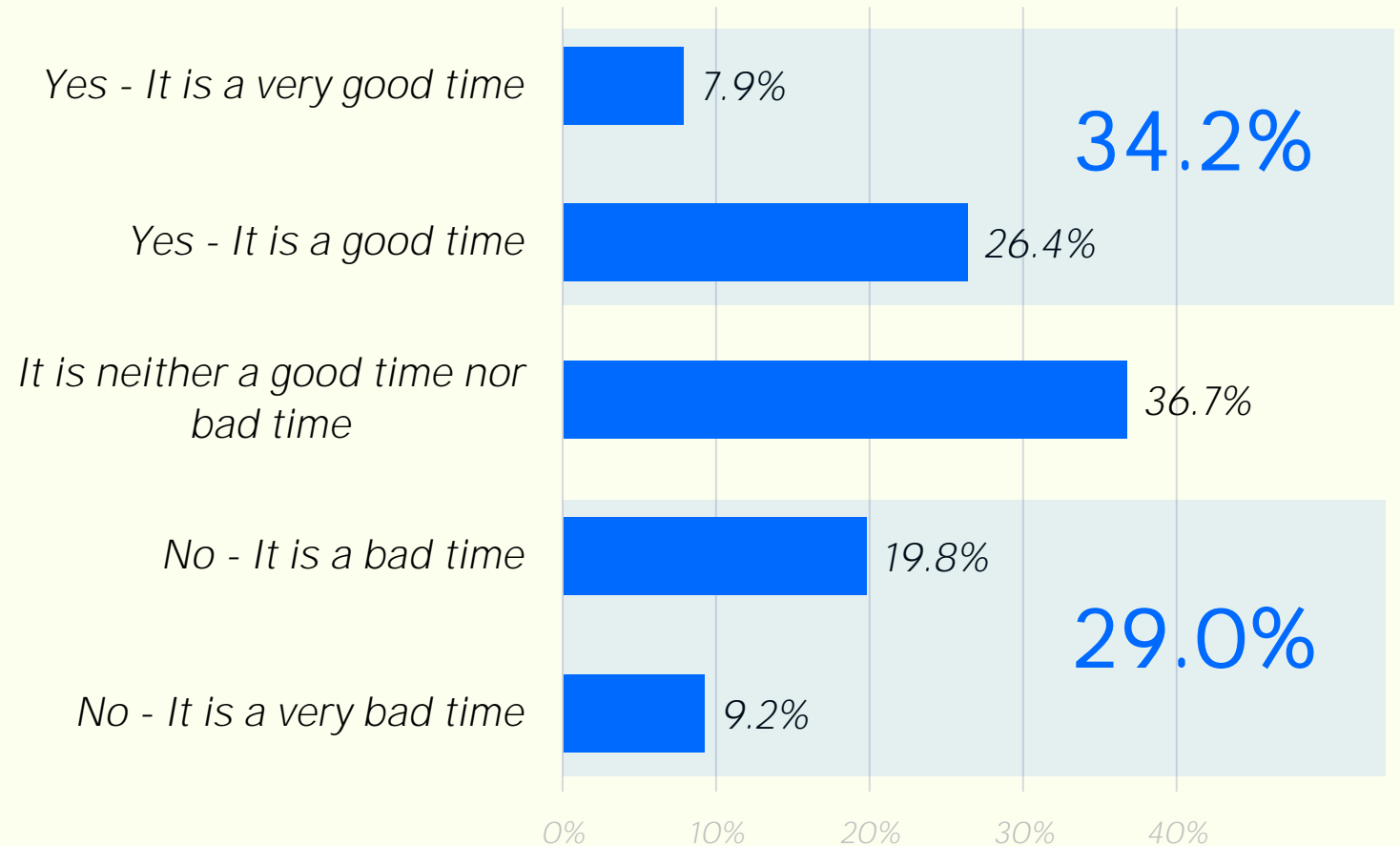
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



# More travelers say now is a good time to spend on leisure travel.

Question:

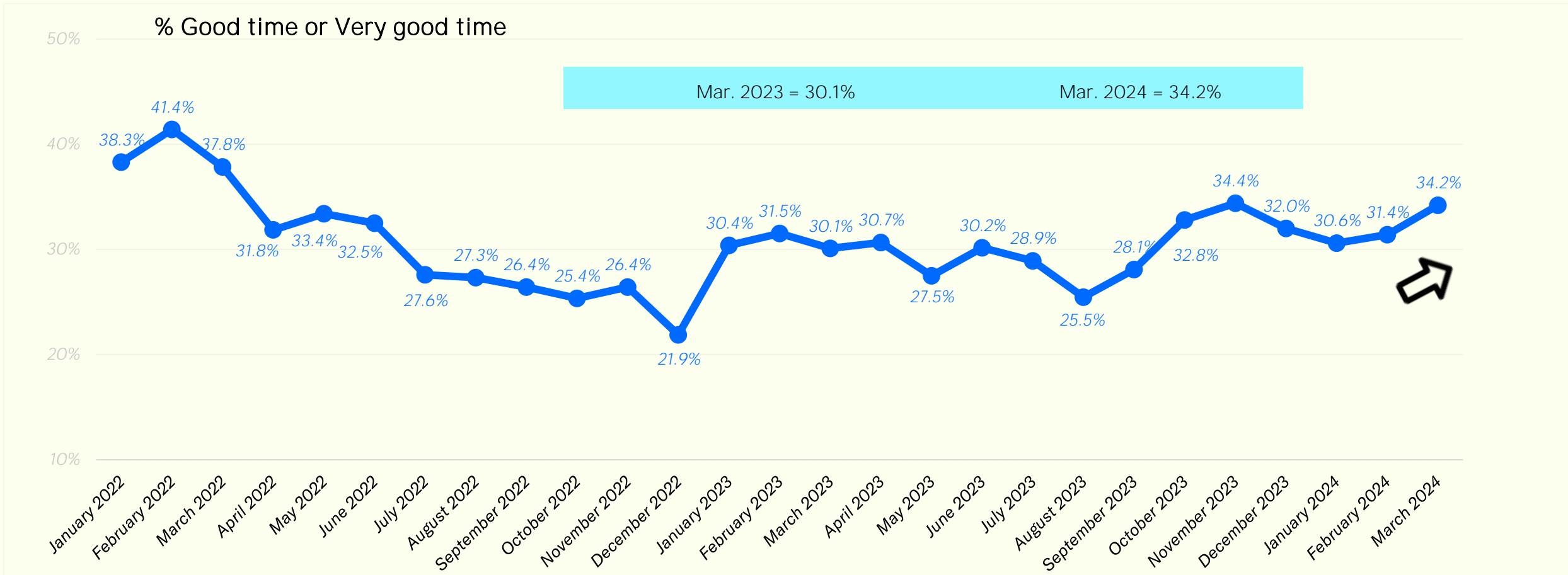
*Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?*



# The belief that now is a “good time to spend on leisure travel” has improved in the last two months.

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?*



Reassuring trend: Anxiety over a coming recession continues to decrease.

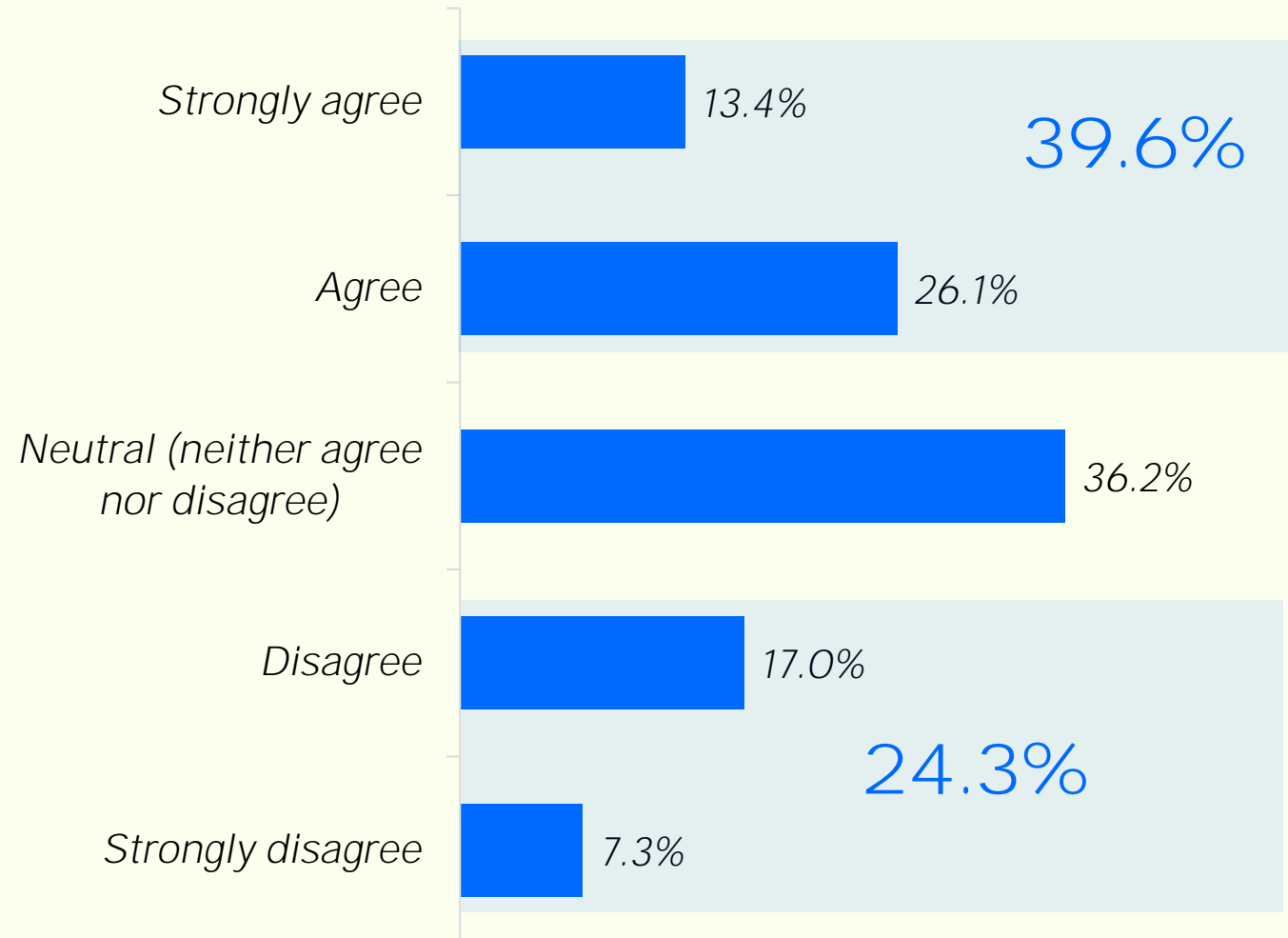




# Only 40% of American travelers now expect a coming recessionary period.

Question:

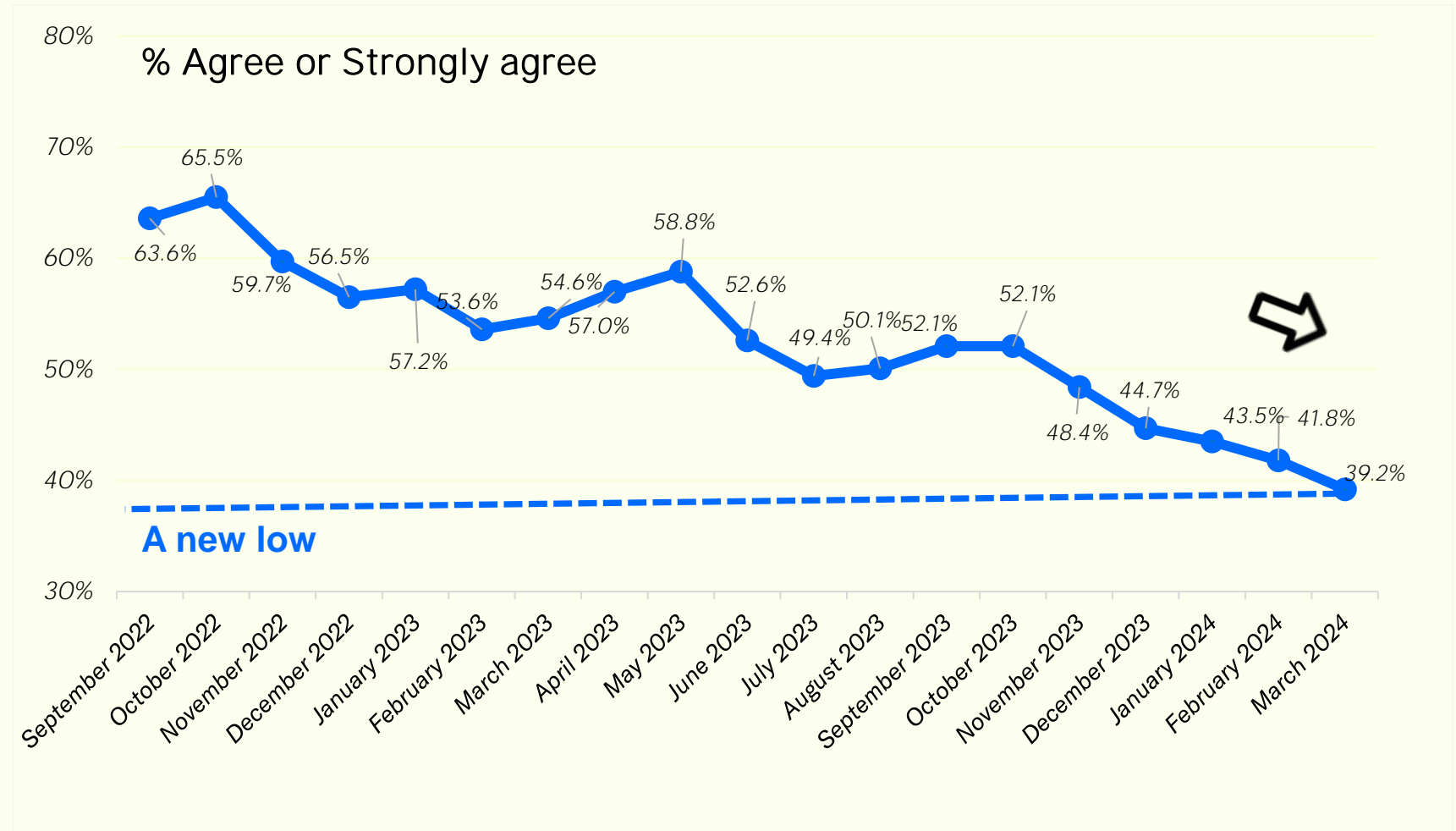
*I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.*



# ...this has been in a steady decline for the past five months.

Statement:

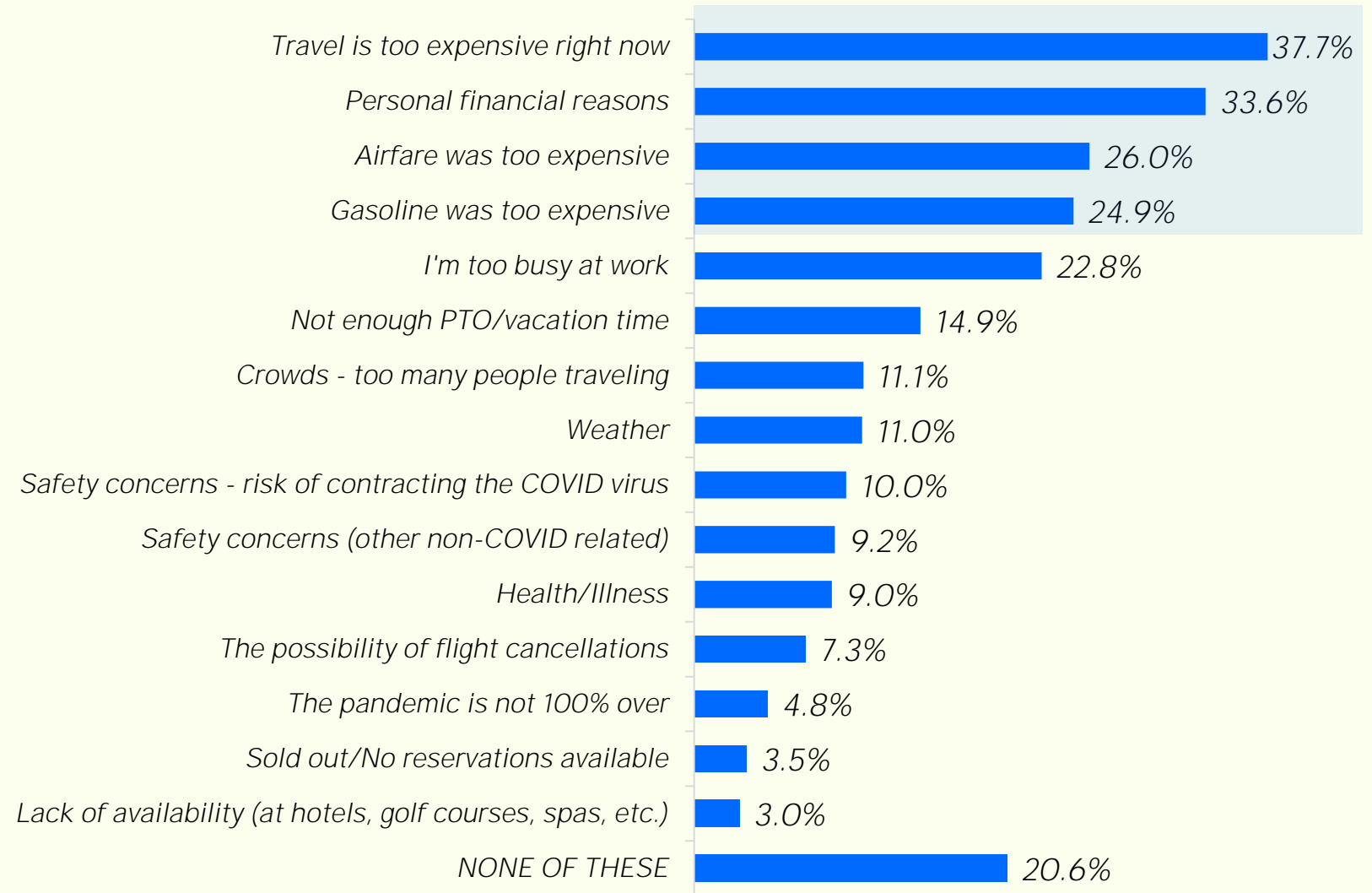
*I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.*



# Persistent barrier: Travel hindered by continued high costs.

## 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 has been increasing as a deterrent over the past three months.

## Question:

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





# Looking Forward

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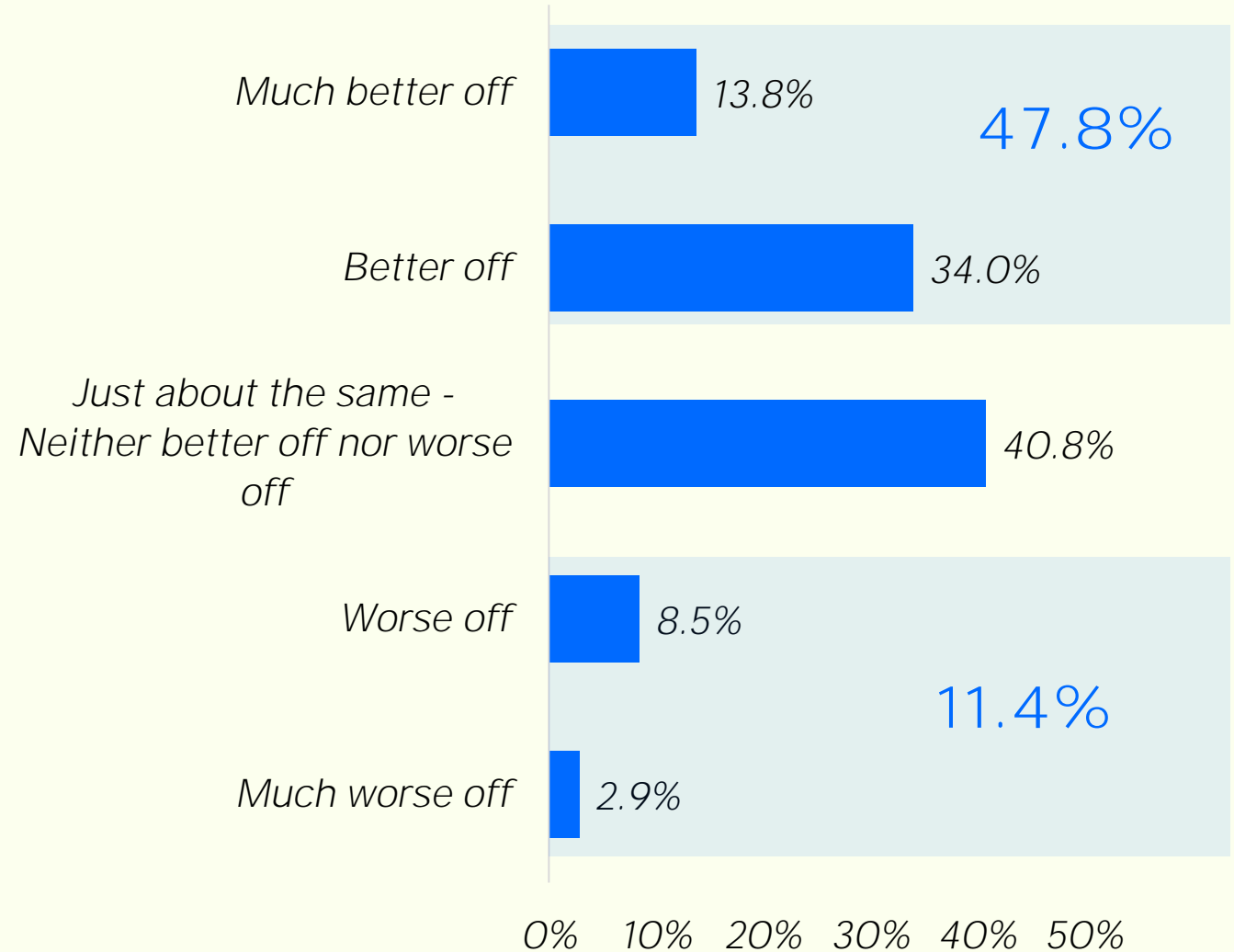
Sustained enthusiasm: Travelers remain optimistic about their future finances and travel expectations.



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

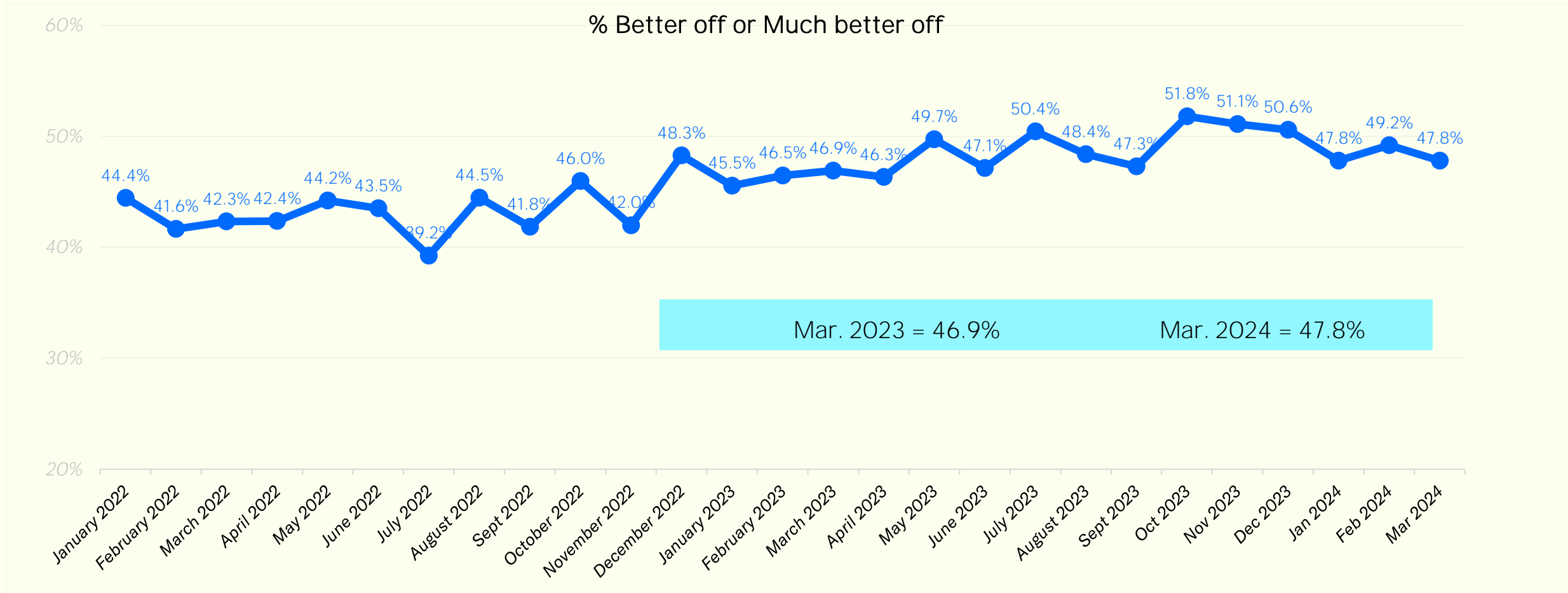
Question:

*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 dipped very 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?*

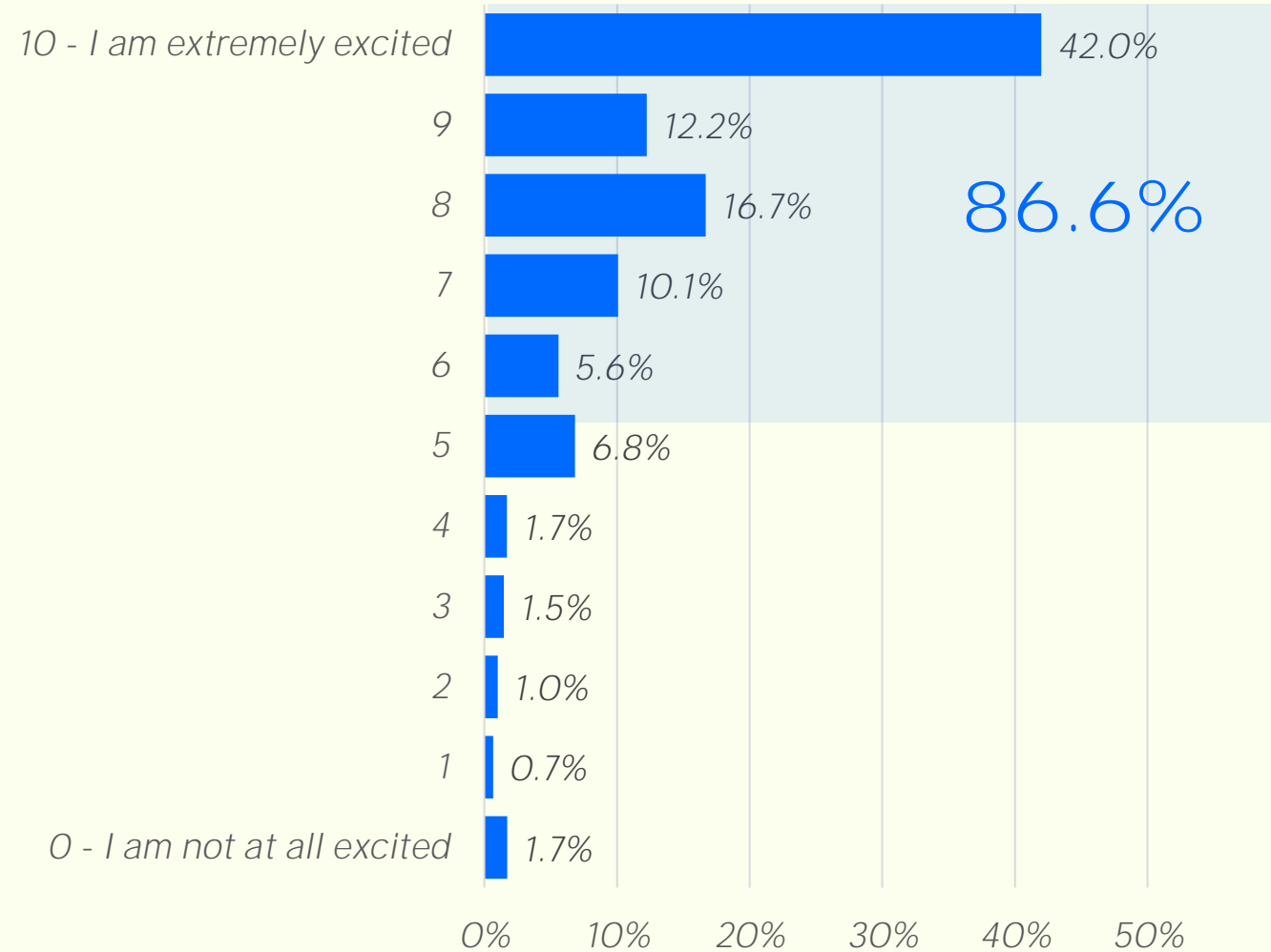




# Excitement for travel remains elevated.

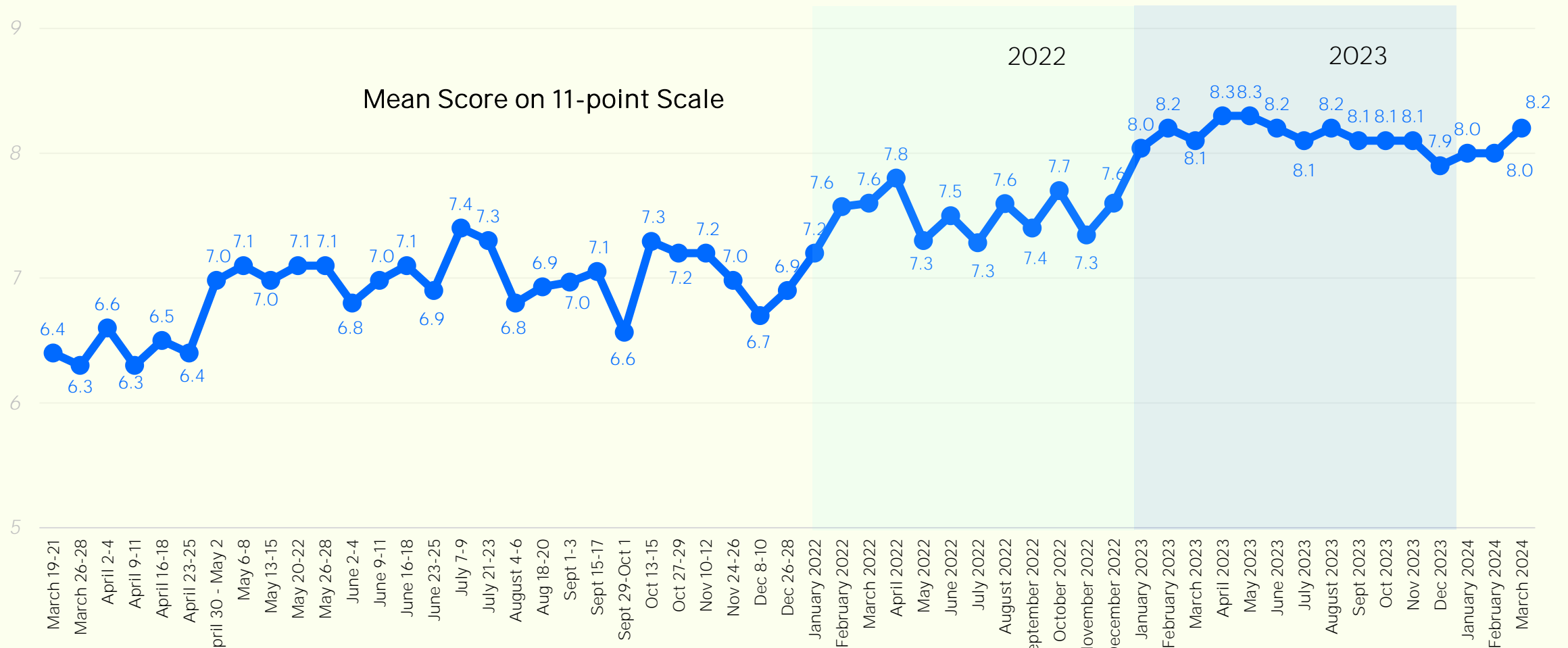
## Question:

*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 held steady this month.

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

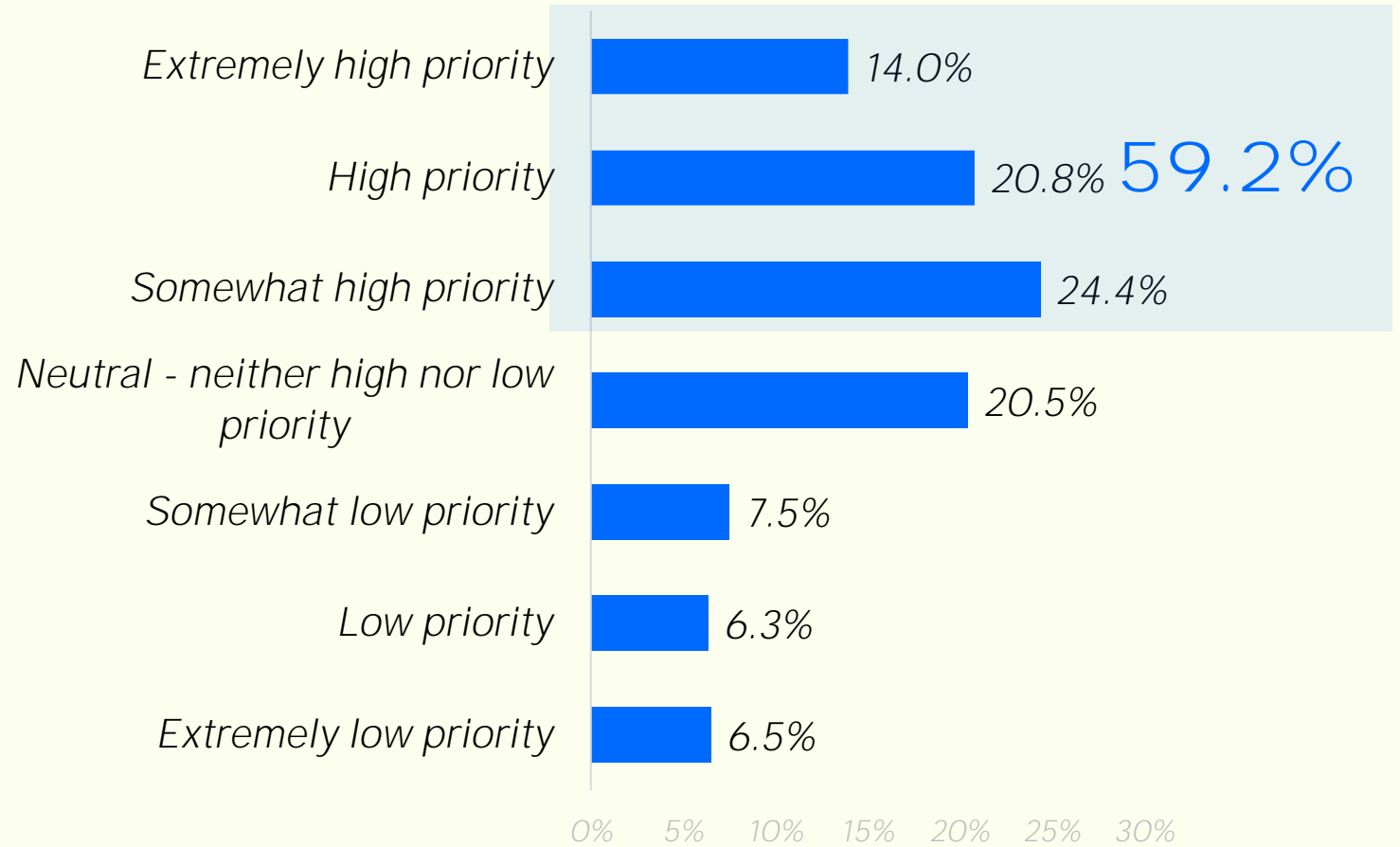


# Most intend to make leisure travel a spending priority in the next three months.

## 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)



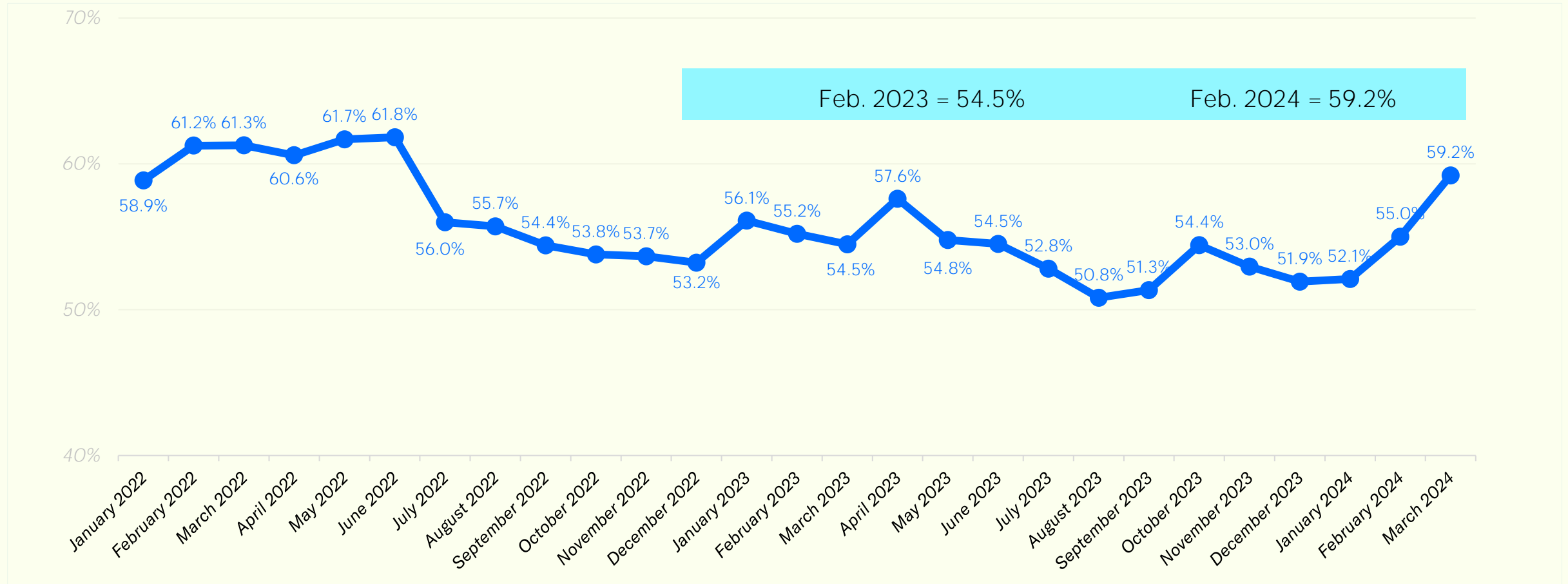
# ...up from last month.

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



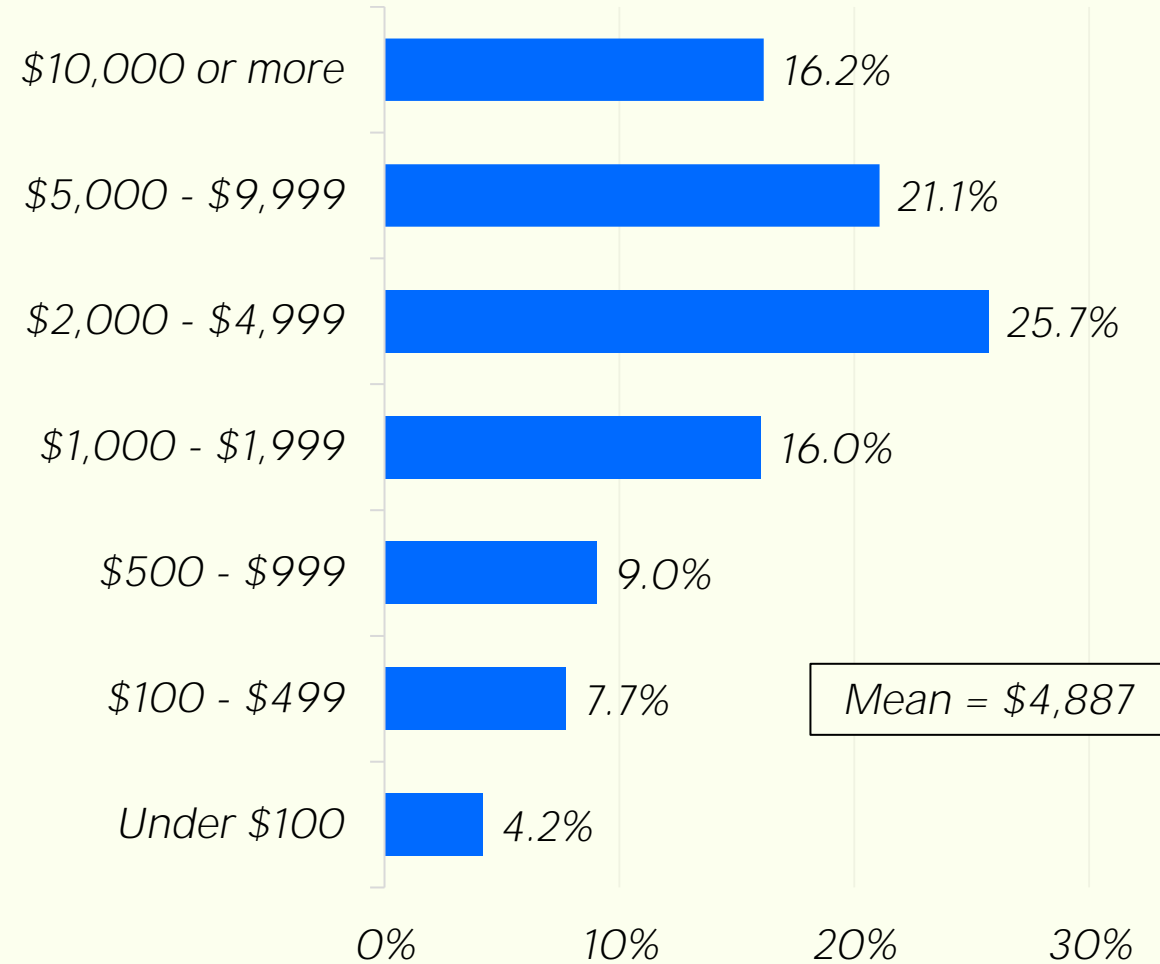
# Expected travel budgets jumped sharply this month.

## 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):*

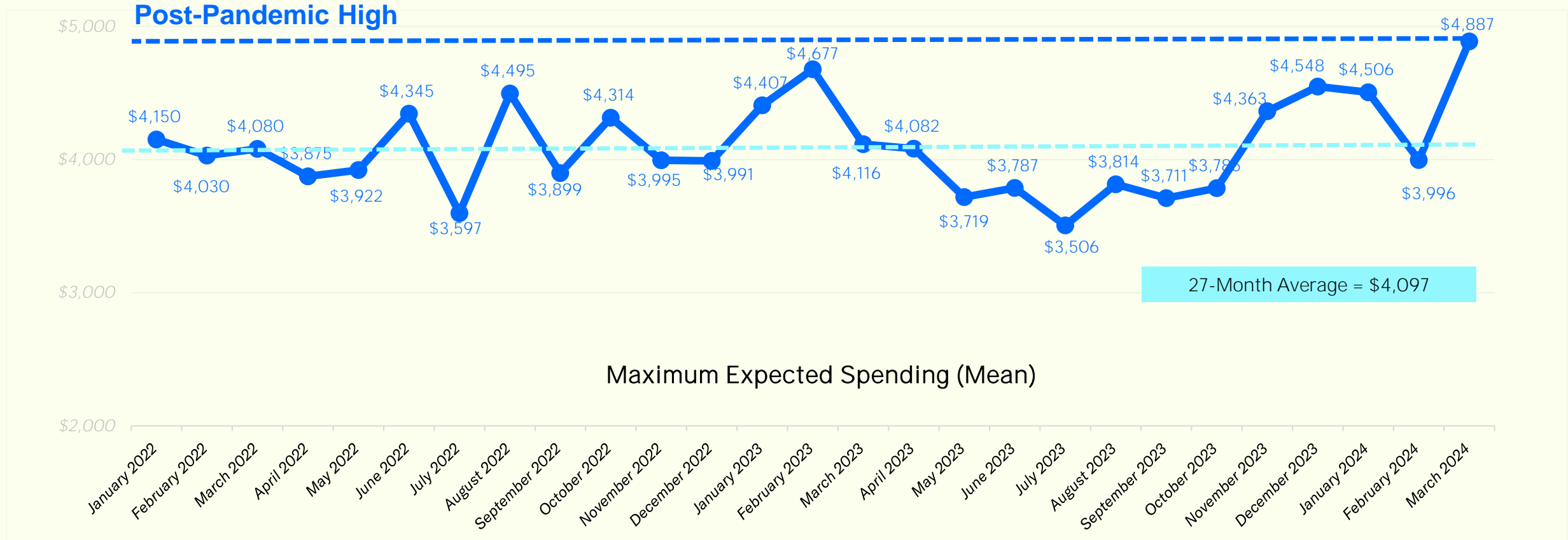
\_\_\_\_\_



# Expected travel budgets jumped sharply this month.

## 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):





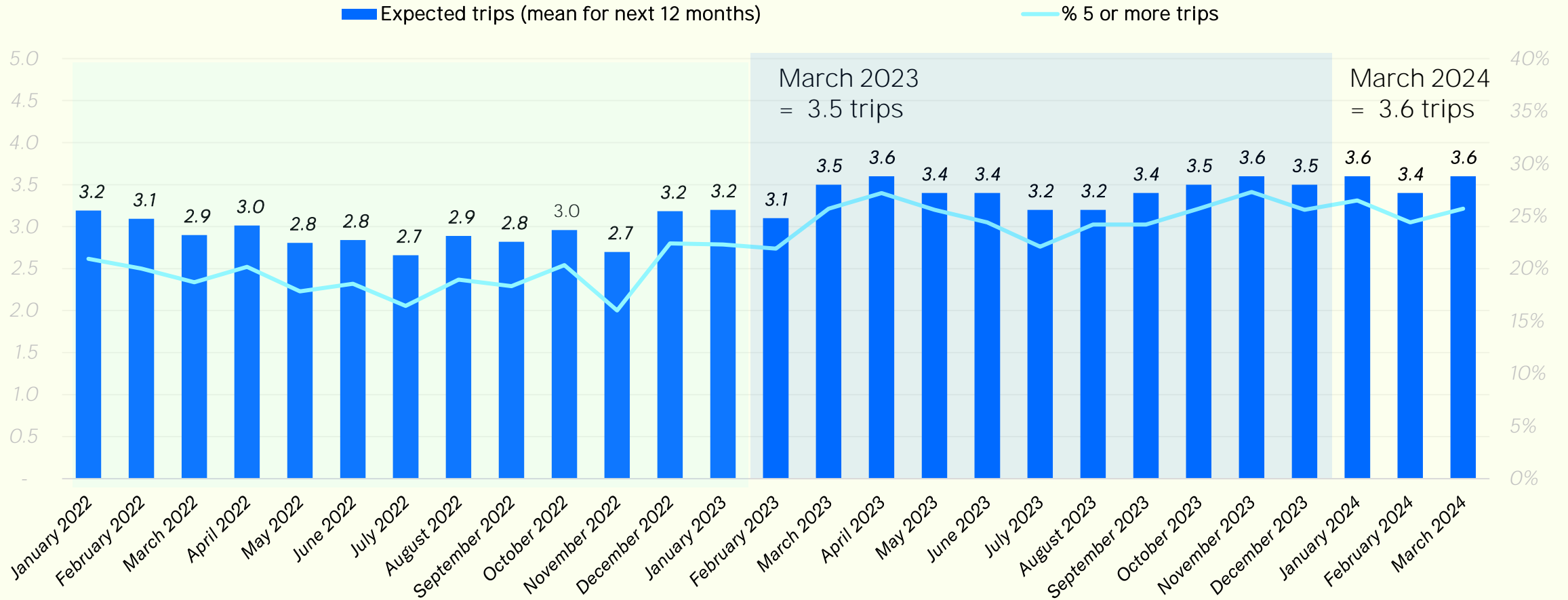
Expectations for future travel  
increased slightly this month.



# Travel expectations increased slightly.

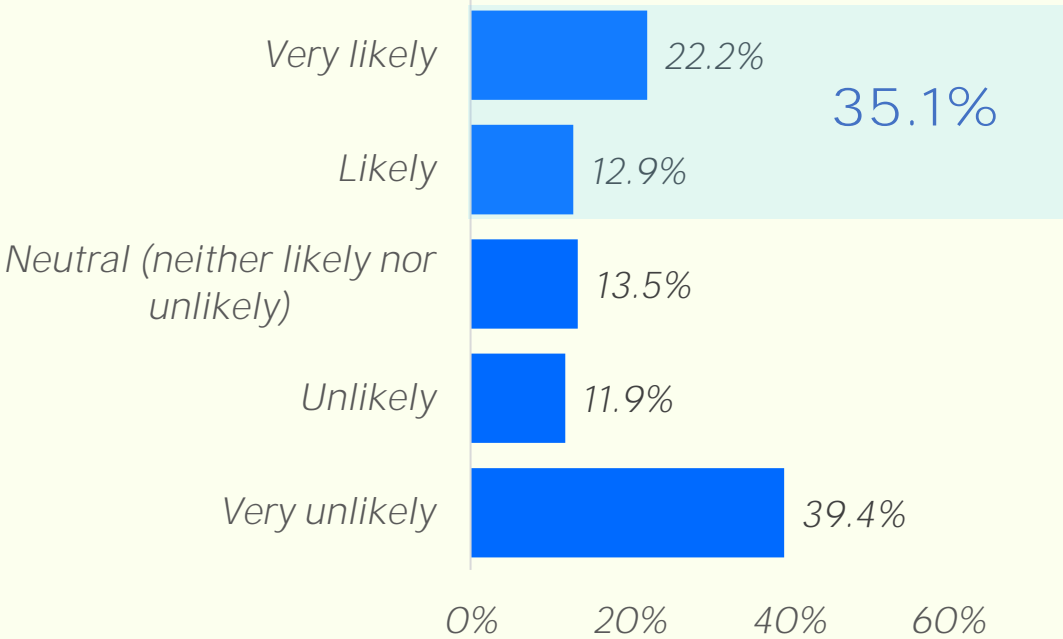
Question:

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

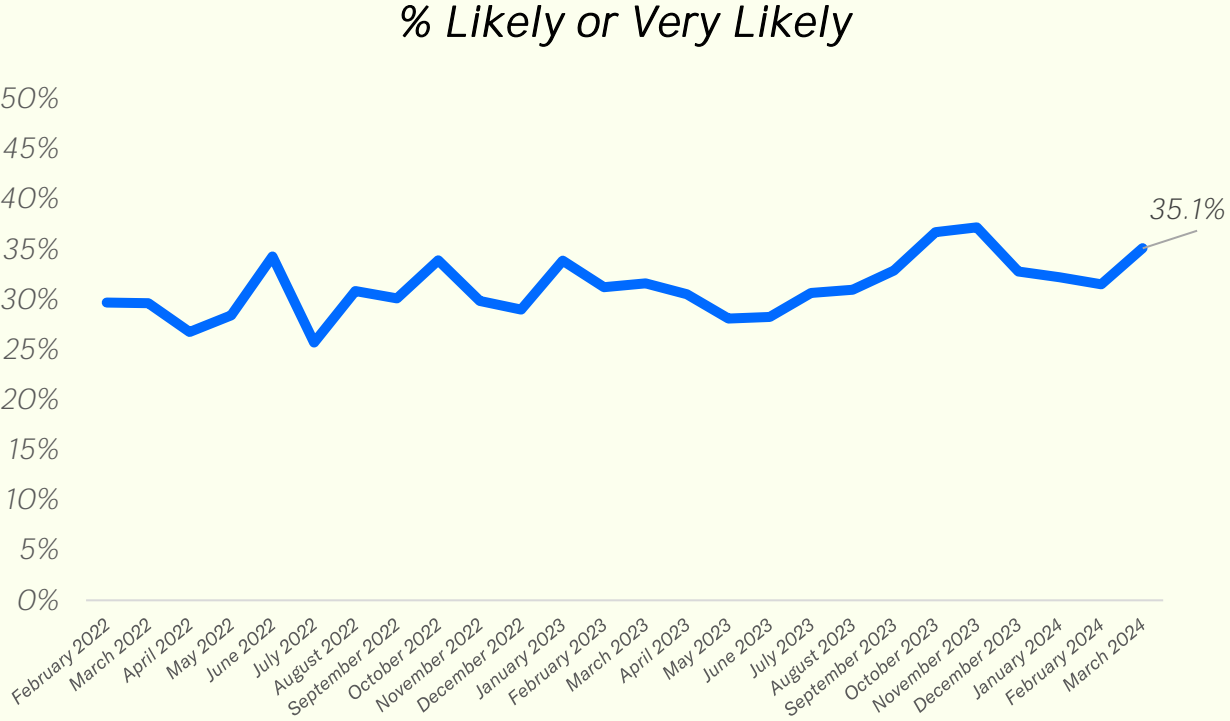


# ...expectations to travel abroad in the next 12 months also increased again this month.

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



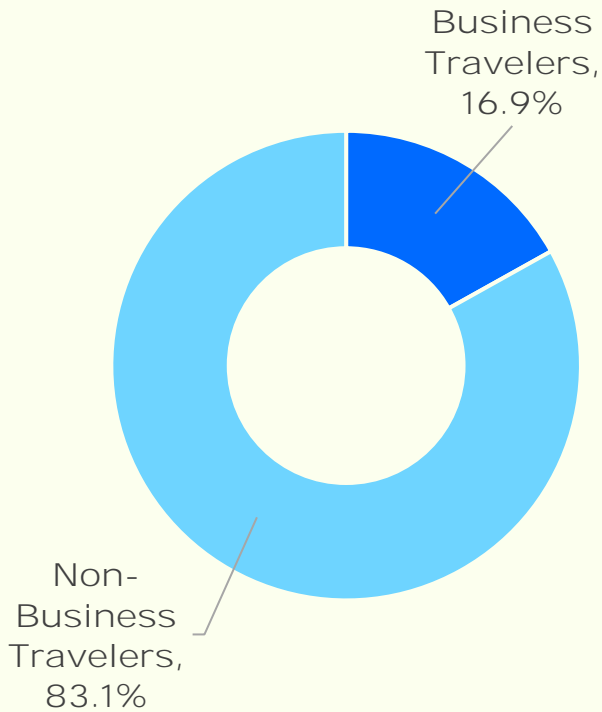
Historical data



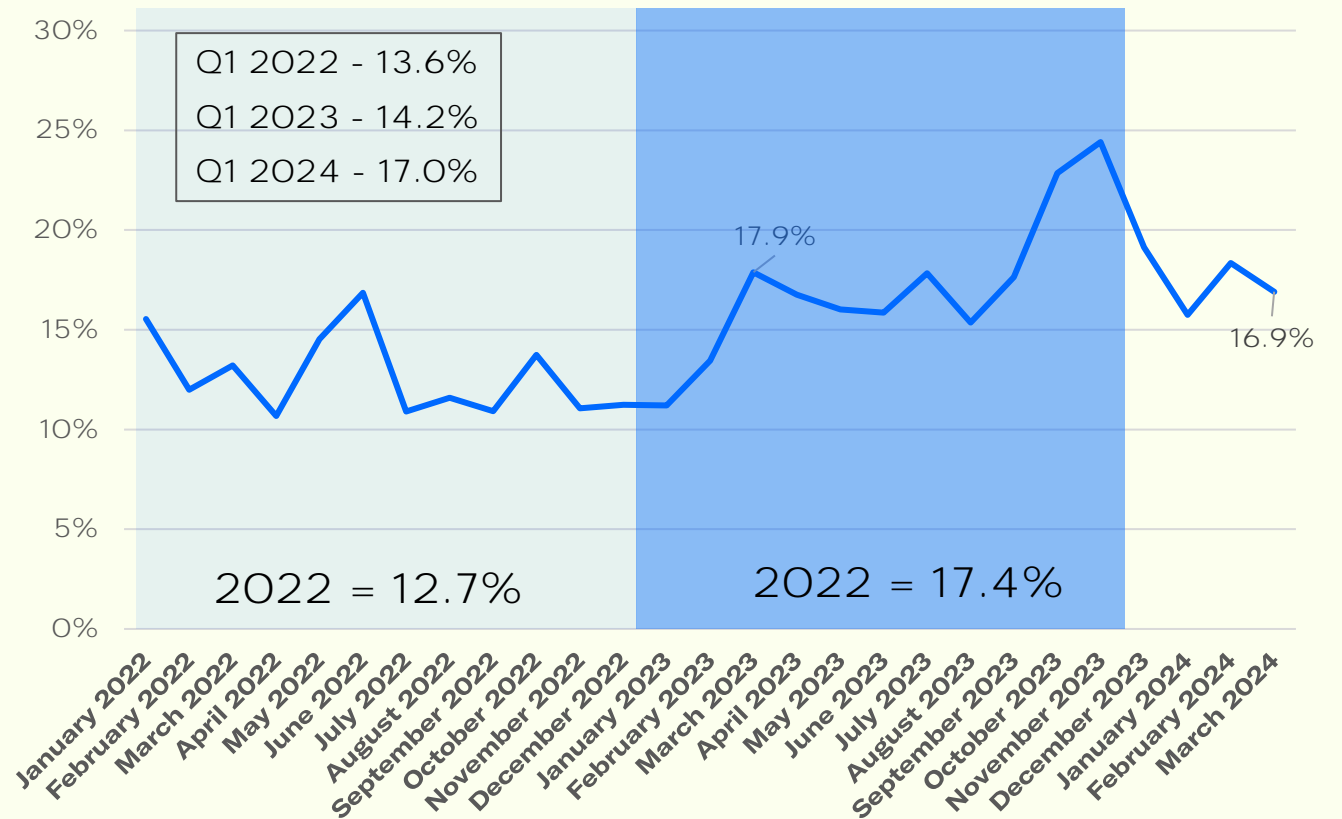
# Overnight business travel grew last year, and is holding this positive trend..

*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



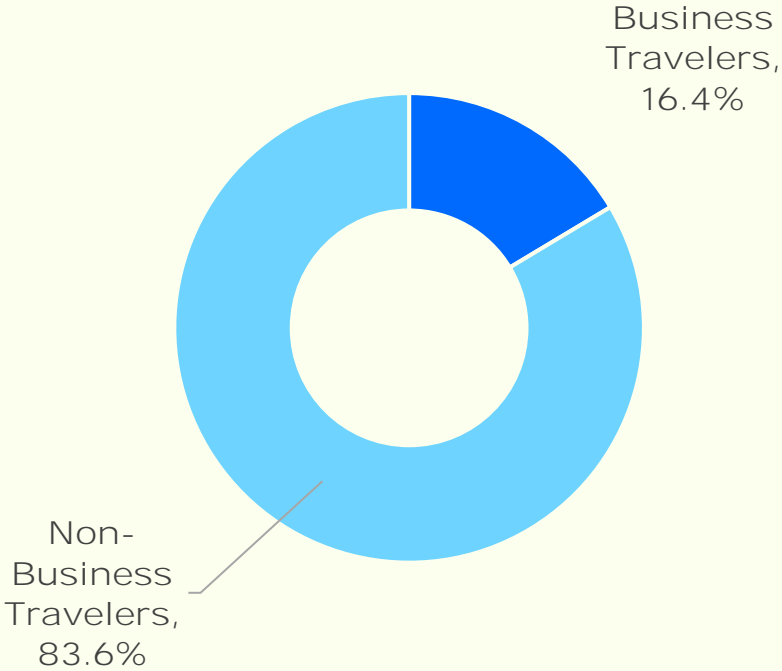
Percent of All Travelers Taking Business Trips



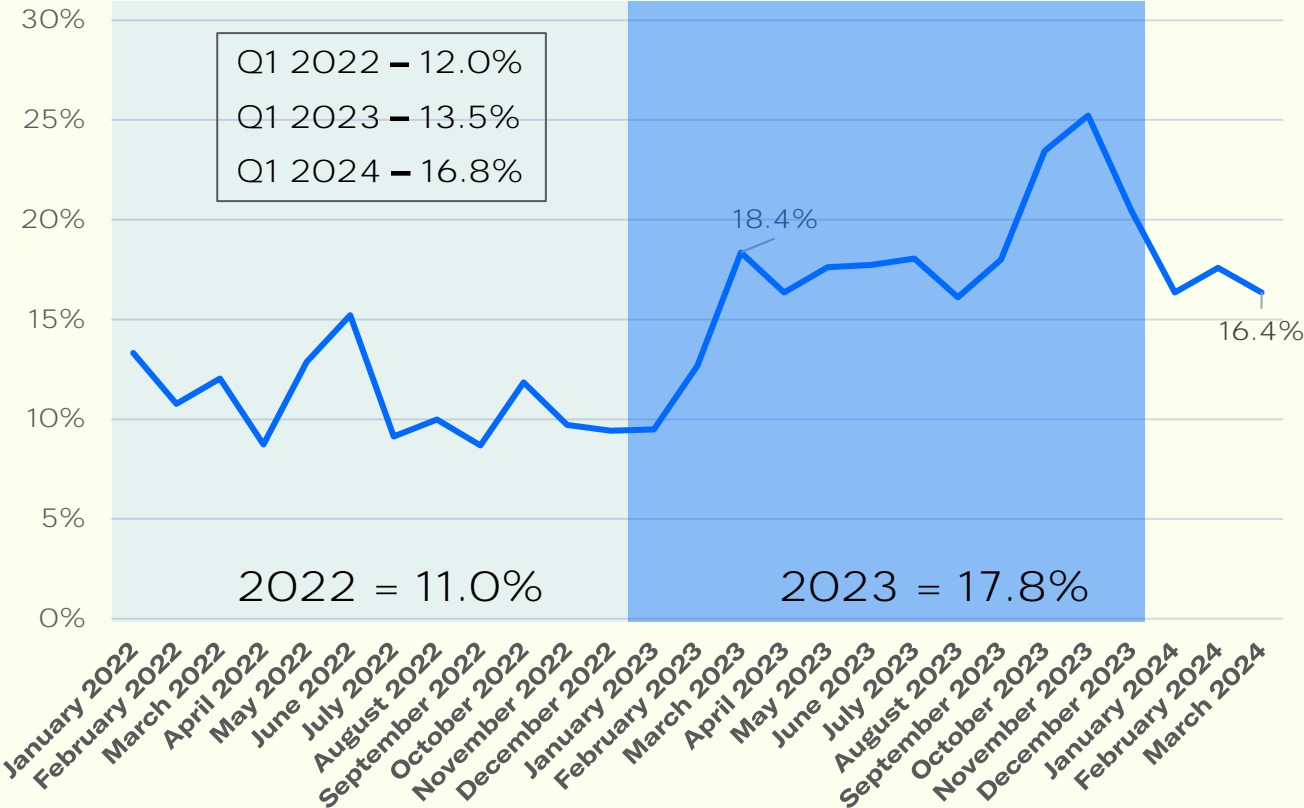
# Day trip business travel followed a similar path.

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

1 or More Day Business Trips



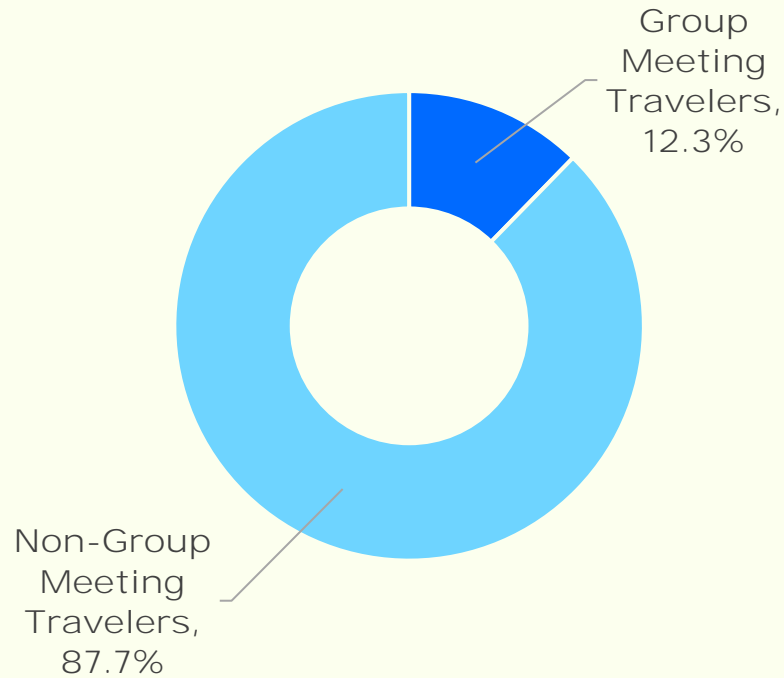
Percent of All Travelers Taking Business Trips



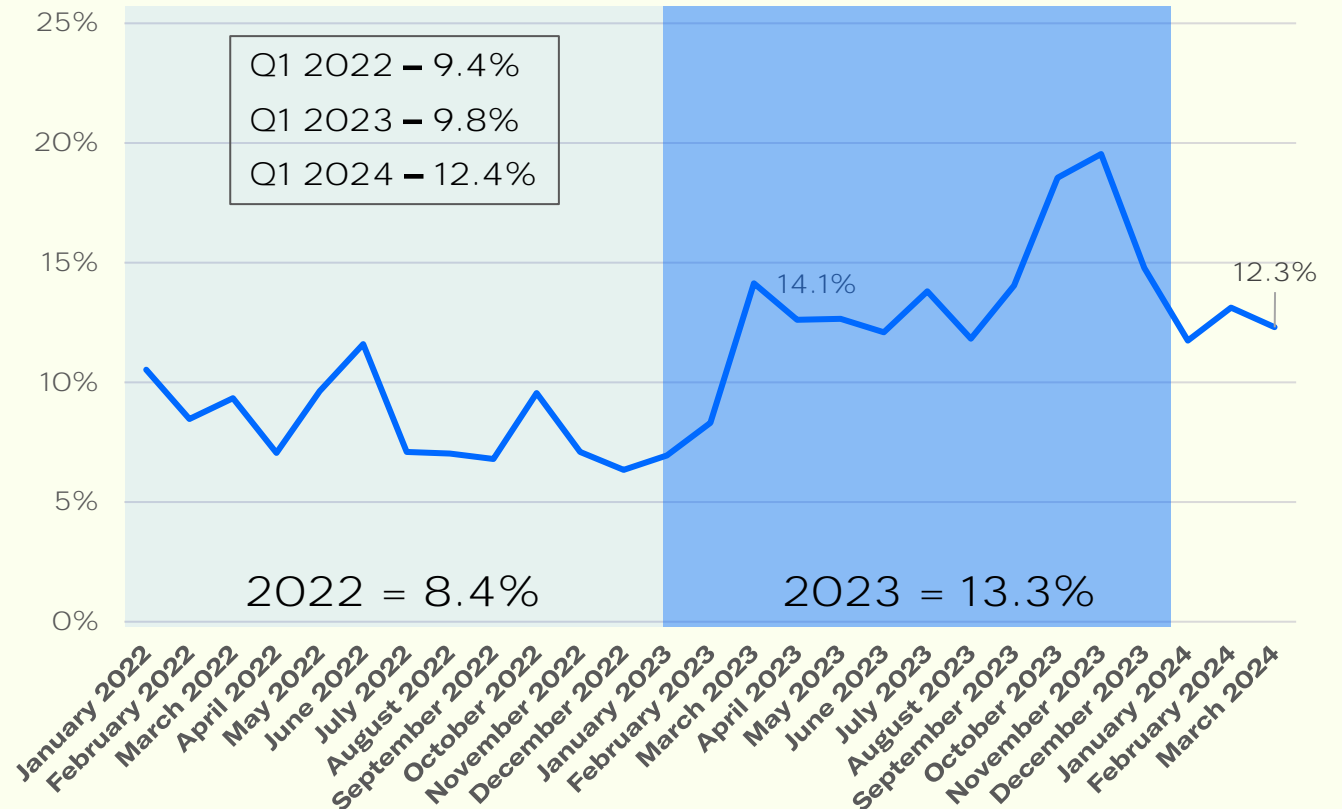
# Overnight group meetings travel improved last year.

*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

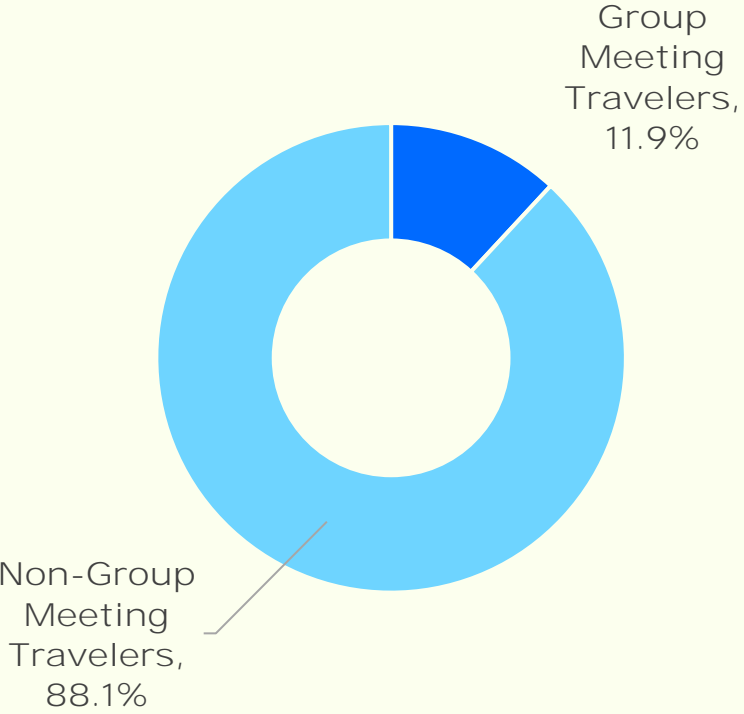




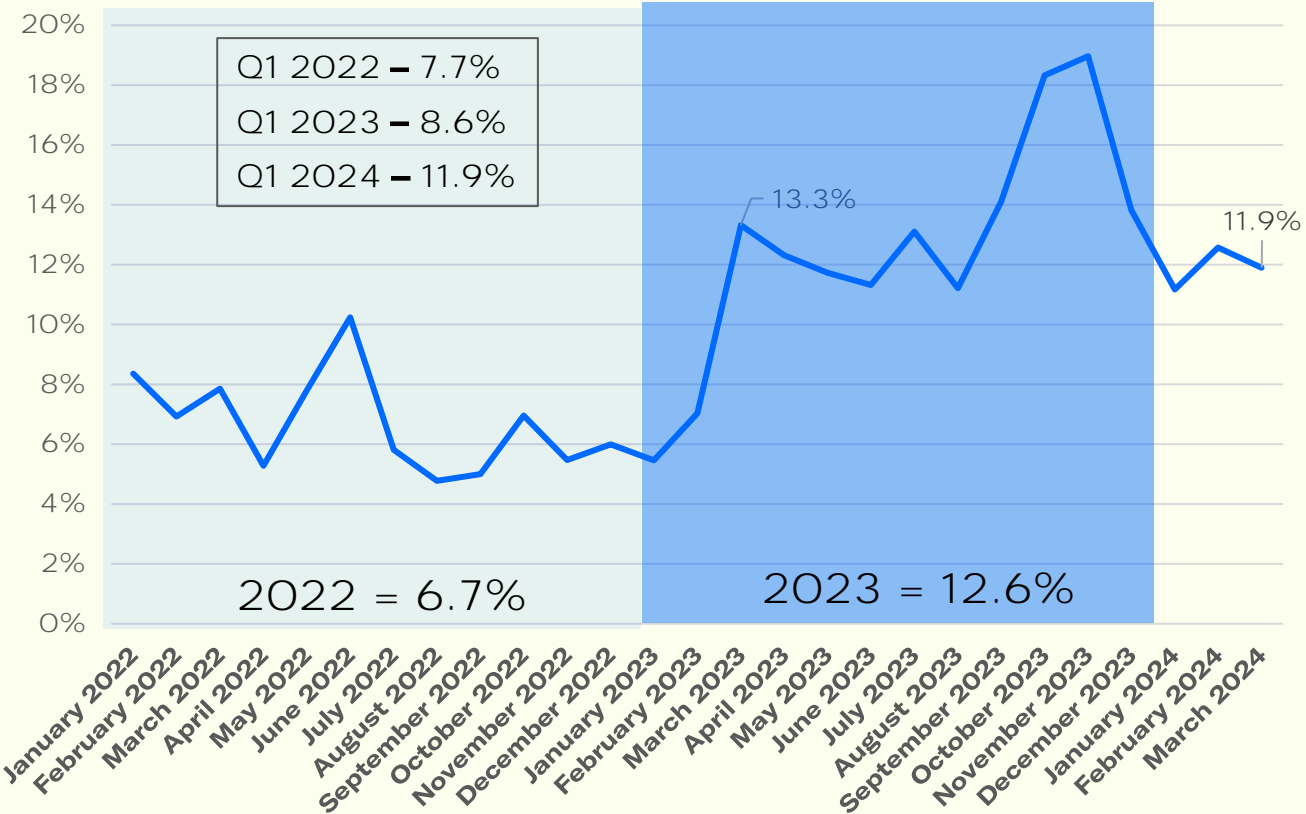
# Day group meetings also followed a similar path.

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

1 or More Group Meetings Day Trips



Percent of All Travelers Taking Group Meetings Day Trips





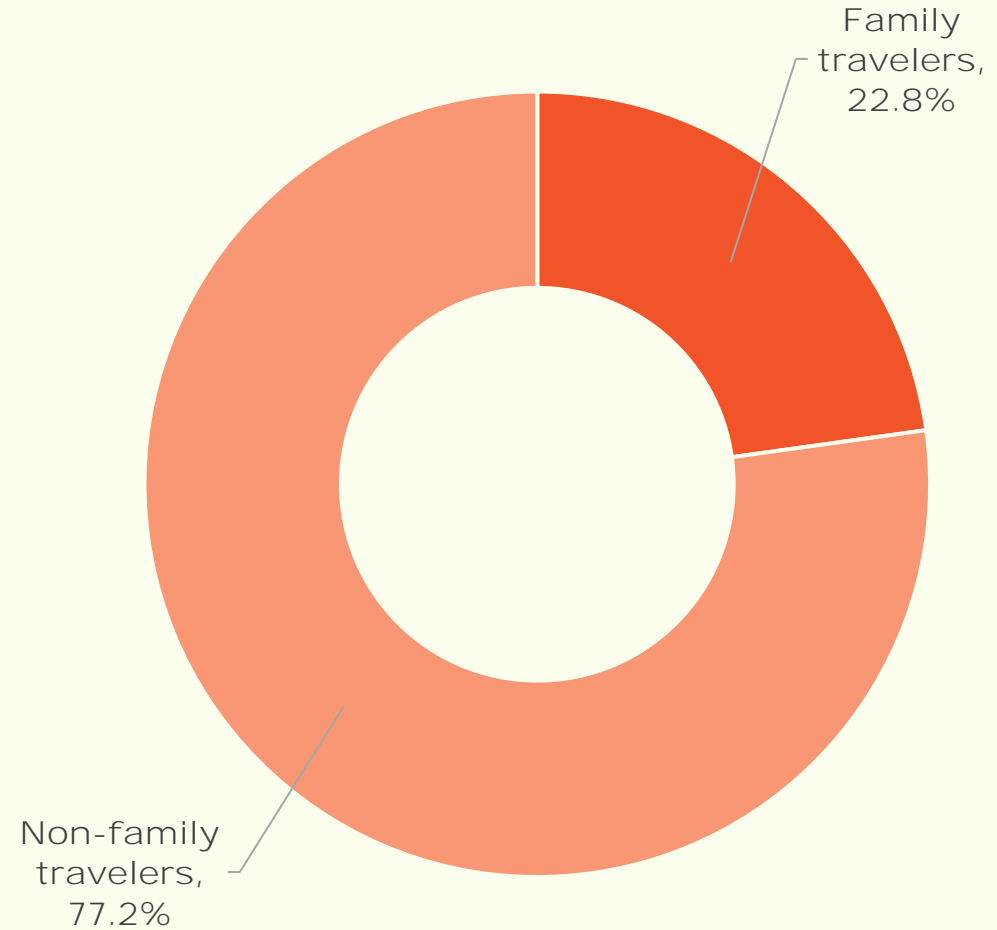
Family Travel

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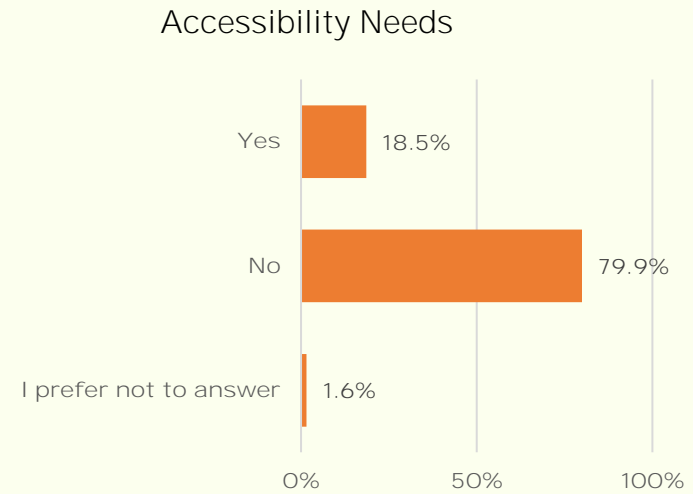
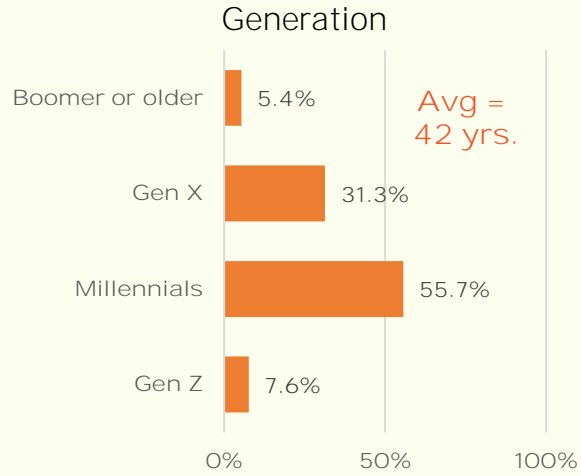
# The family market comprises about 1-in-4 travelers

*Question: Are you a parent to school-aged children who travel with you at least once a year?*

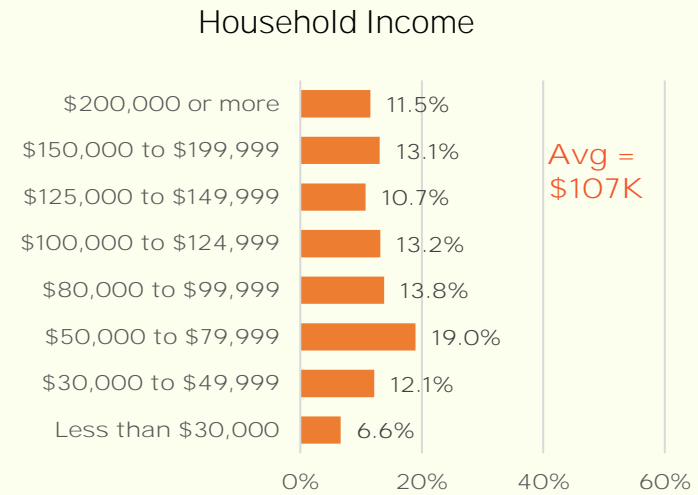
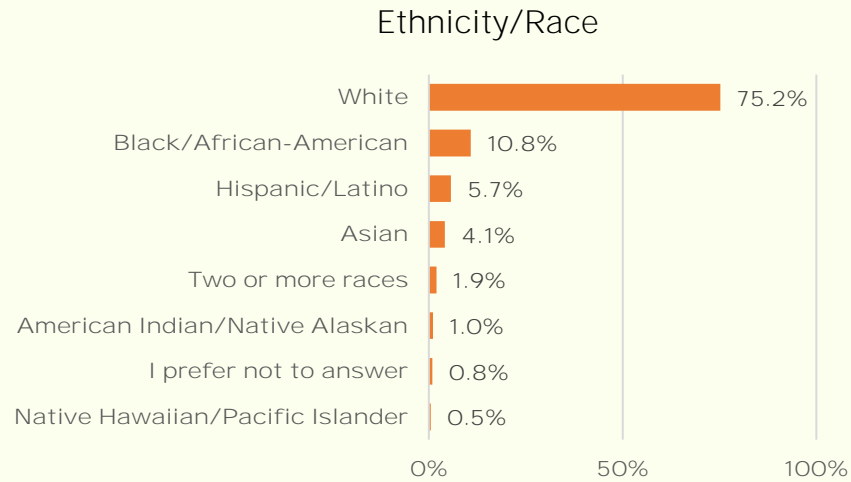


# Demographics

## Family Travelers



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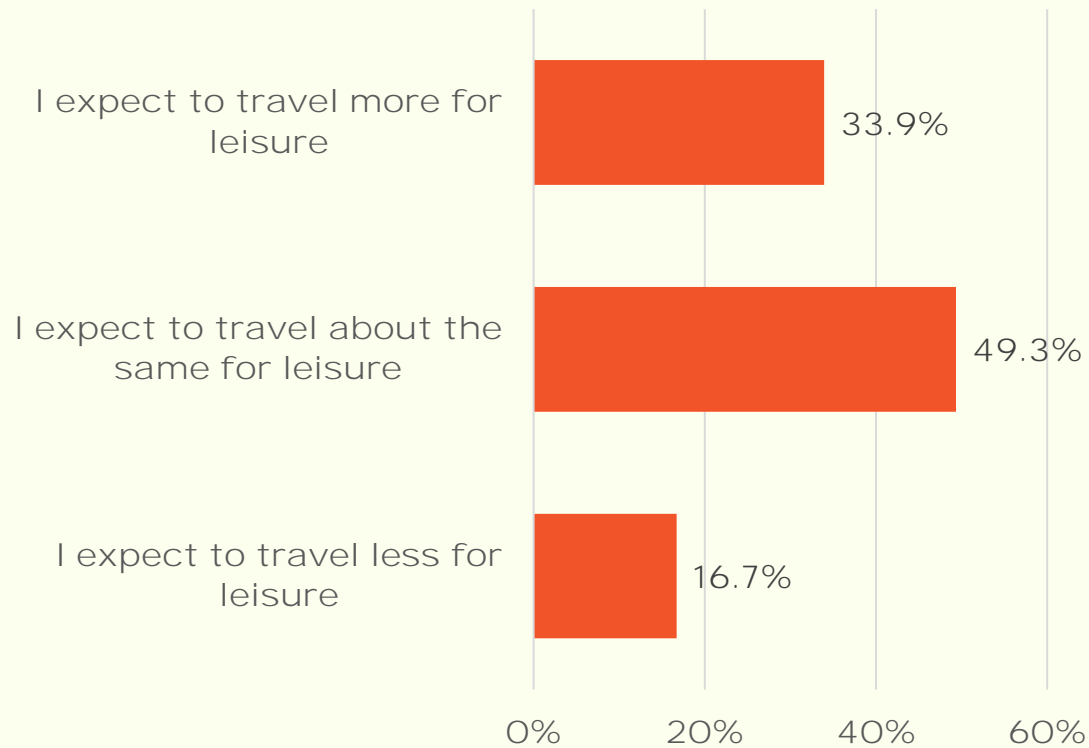
The family travelers are showing very strong enthusiasm for venturing out this year.



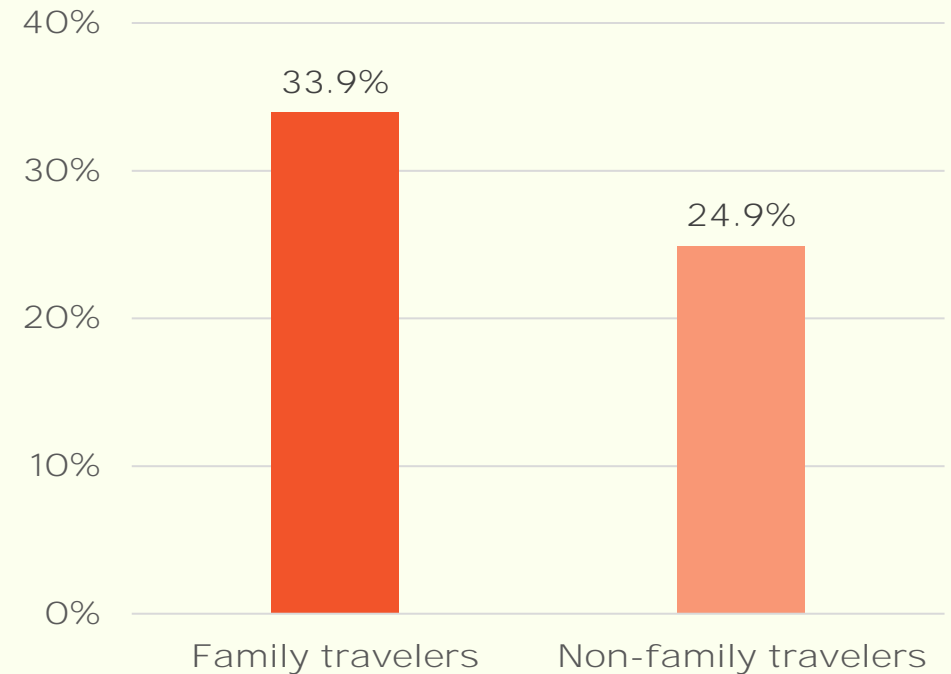
# Family travelers expect to travel more for leisure

Question: *In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period?*

Family travelers



Family vs. Non-family Travelers  
(I expect to travel more in the next 12 months)

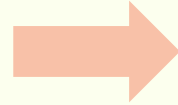
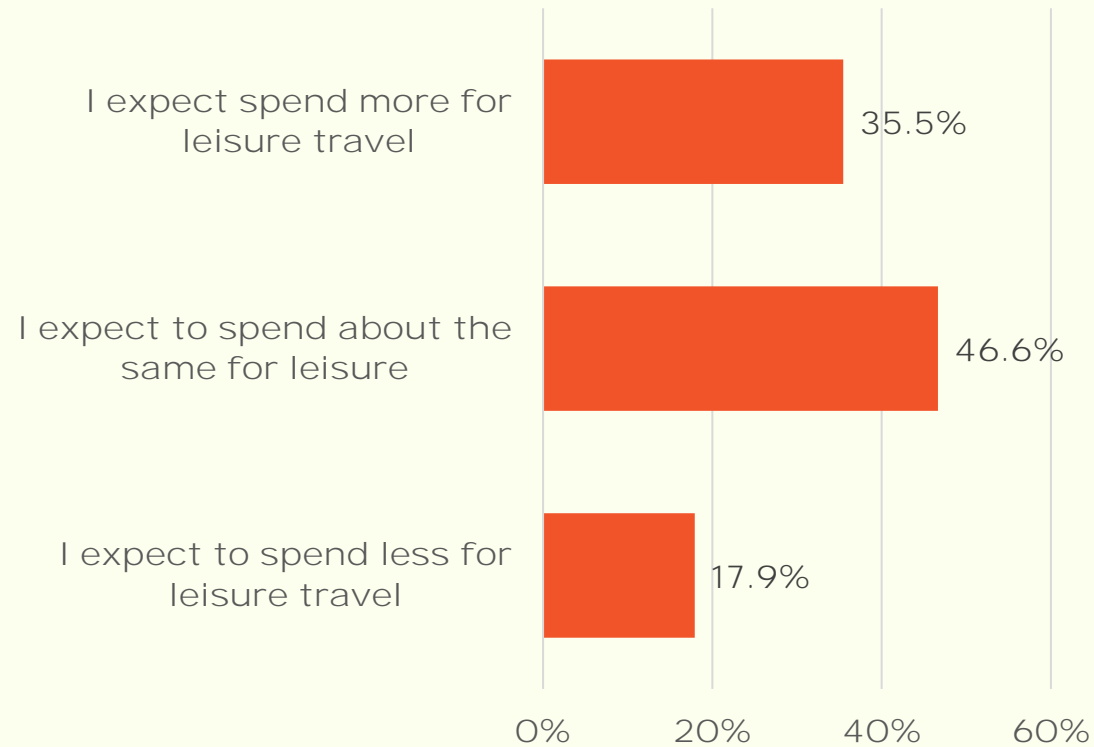




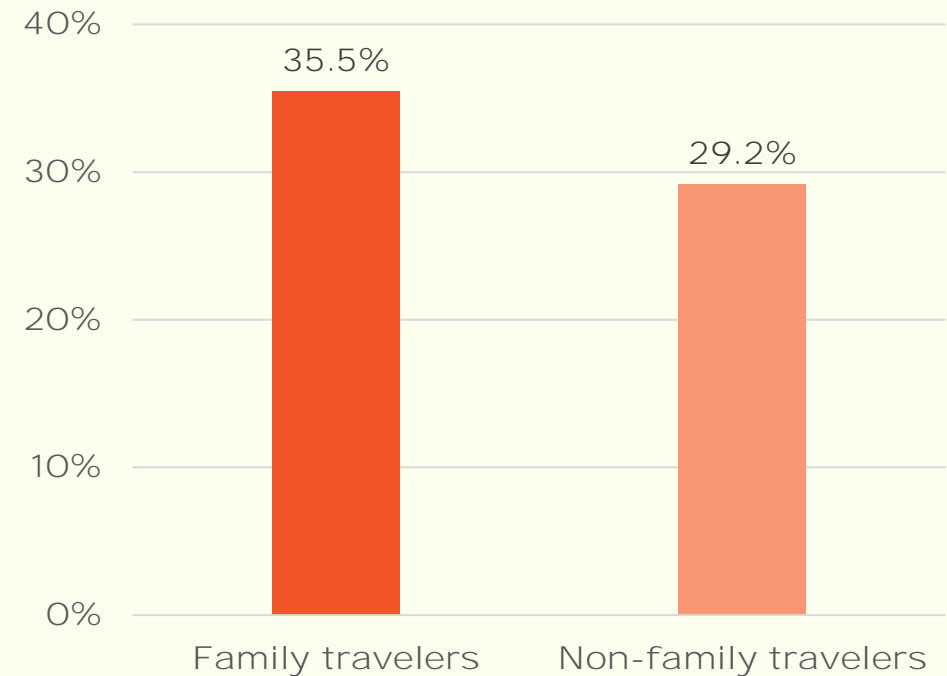
# Family travelers expect to spend more on leisure travel

Question: *In the NEXT 12 MONTHS, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?*

### Family travelers



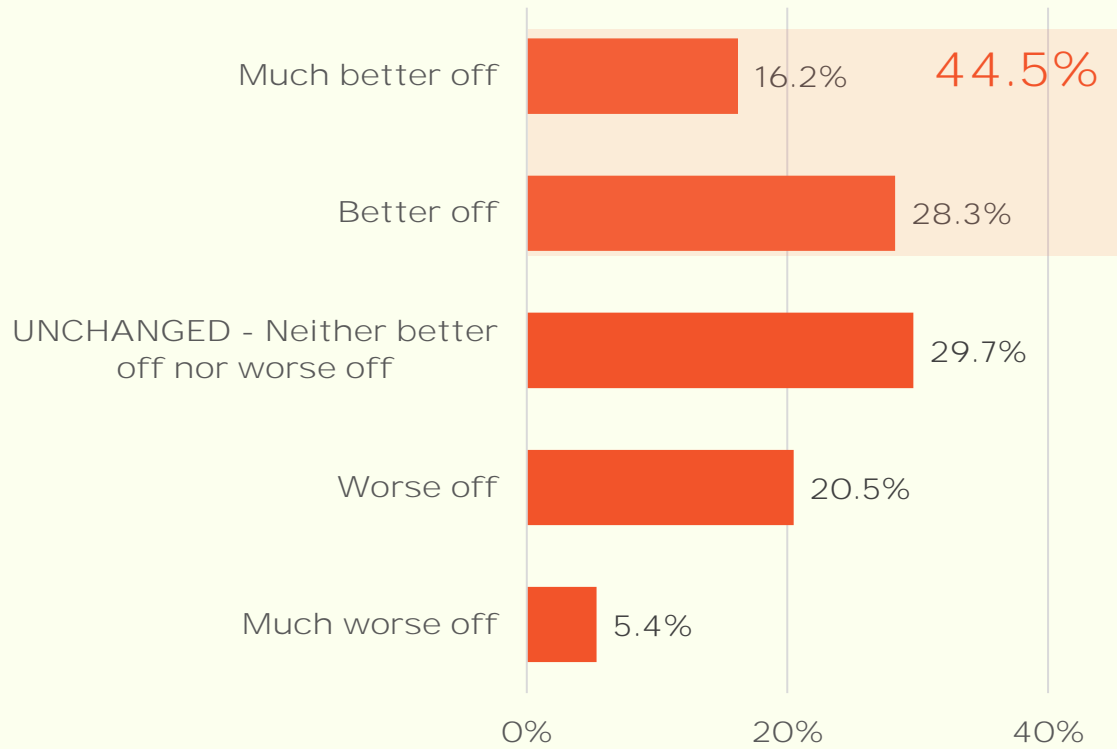
### Family vs. Non-family Travelers (I expect to spend more on travel in the next 12 months)



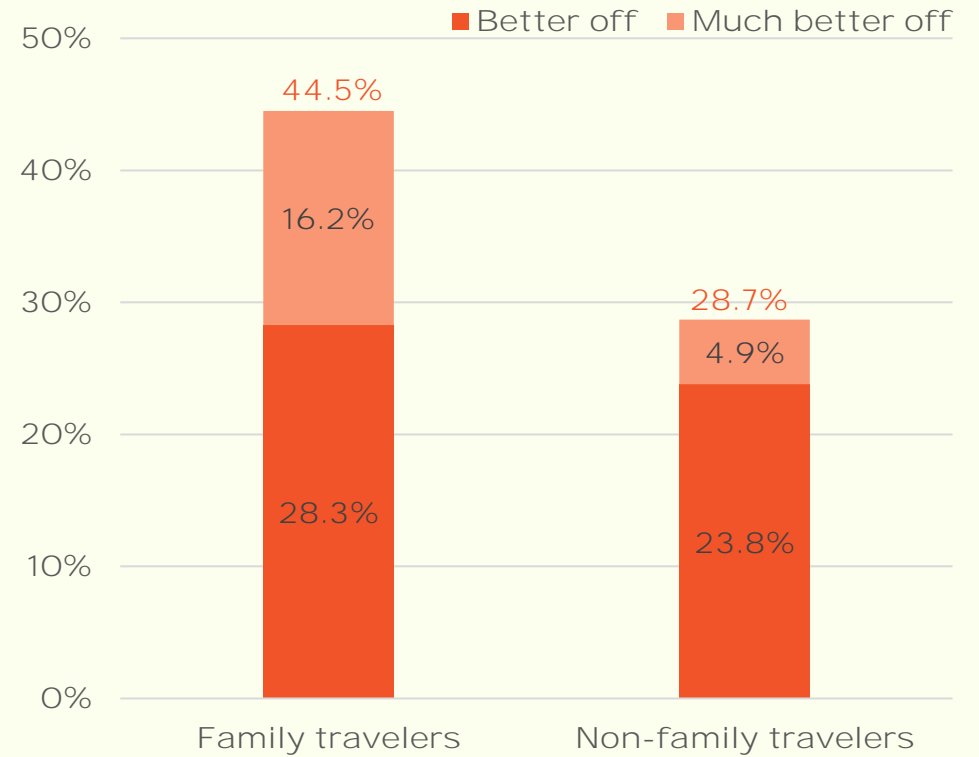
# Family travelers are feeling better off

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

### Family travelers



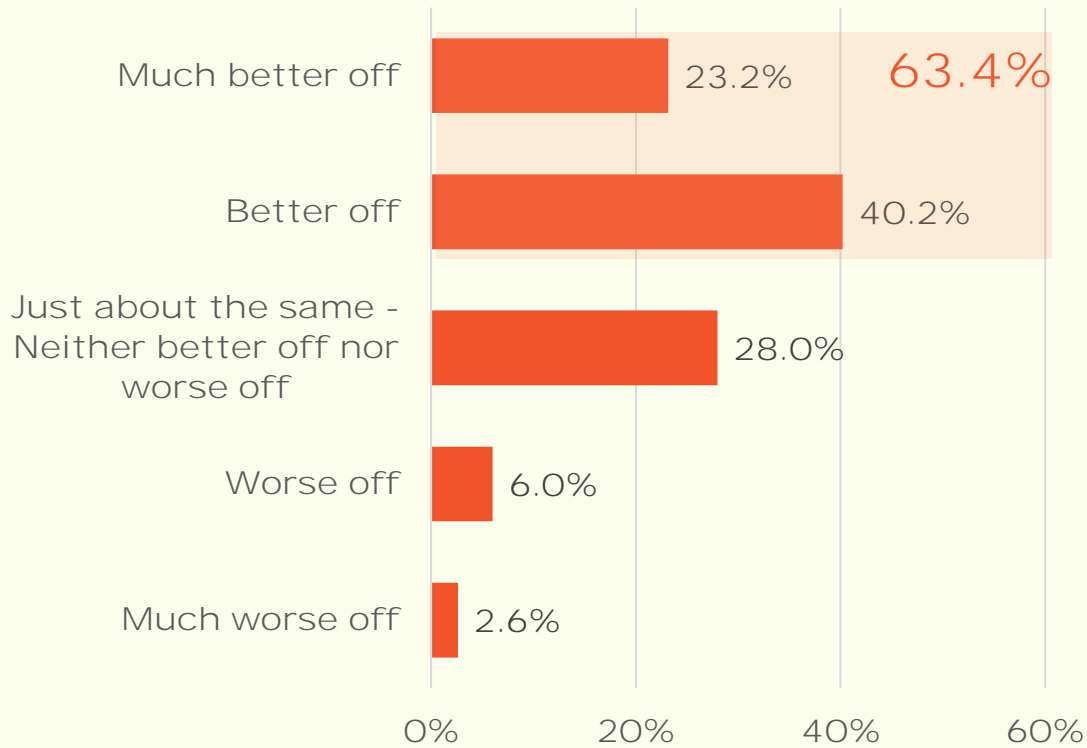
### Family vs. Non-family Travelers



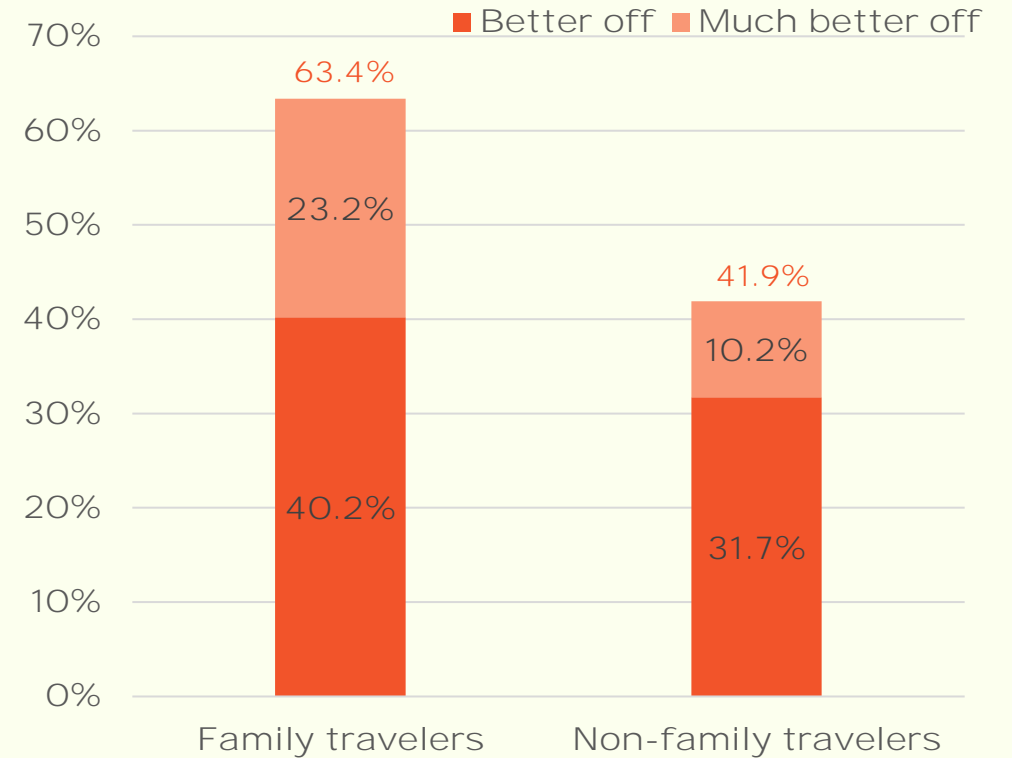
# Family travelers are optimistic about their finances

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?

Family travelers



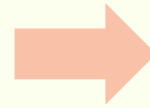
Family vs. Non-family Travelers



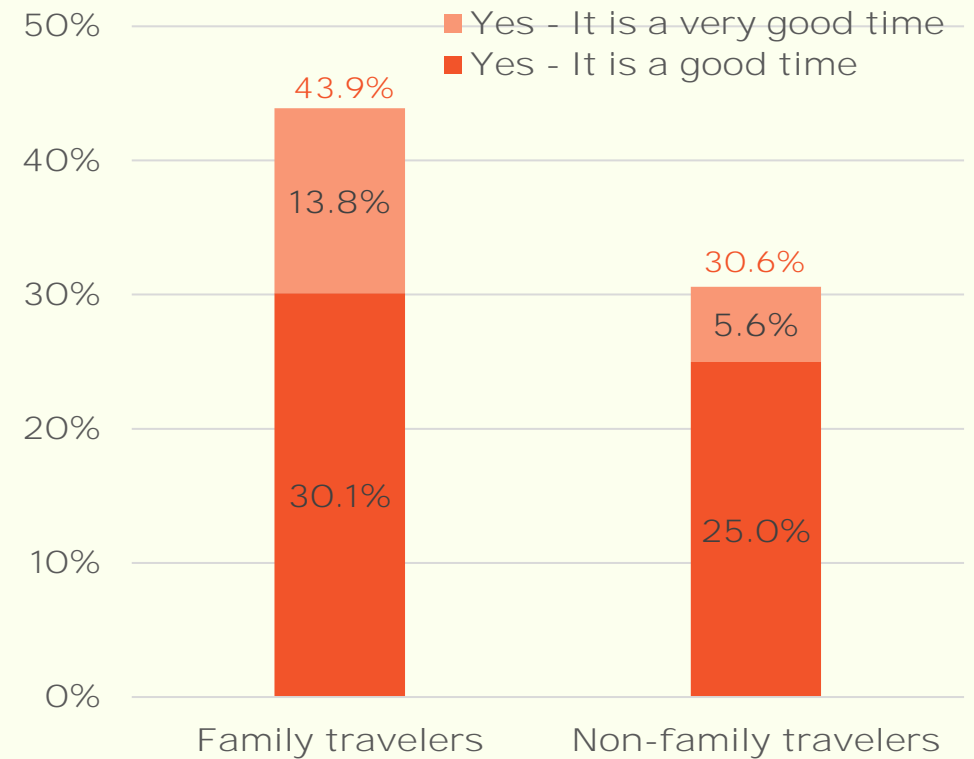
# Family travelers are ready to spend on leisure

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?*

### Family travelers



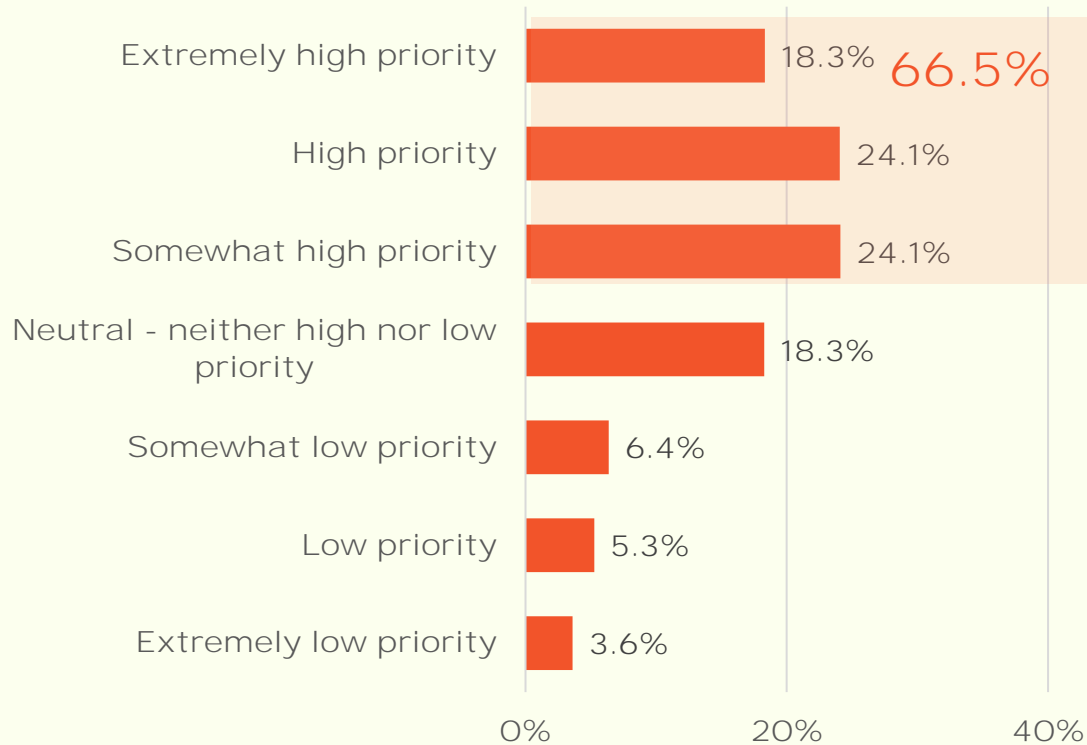
### Family vs. Non-family Travelers



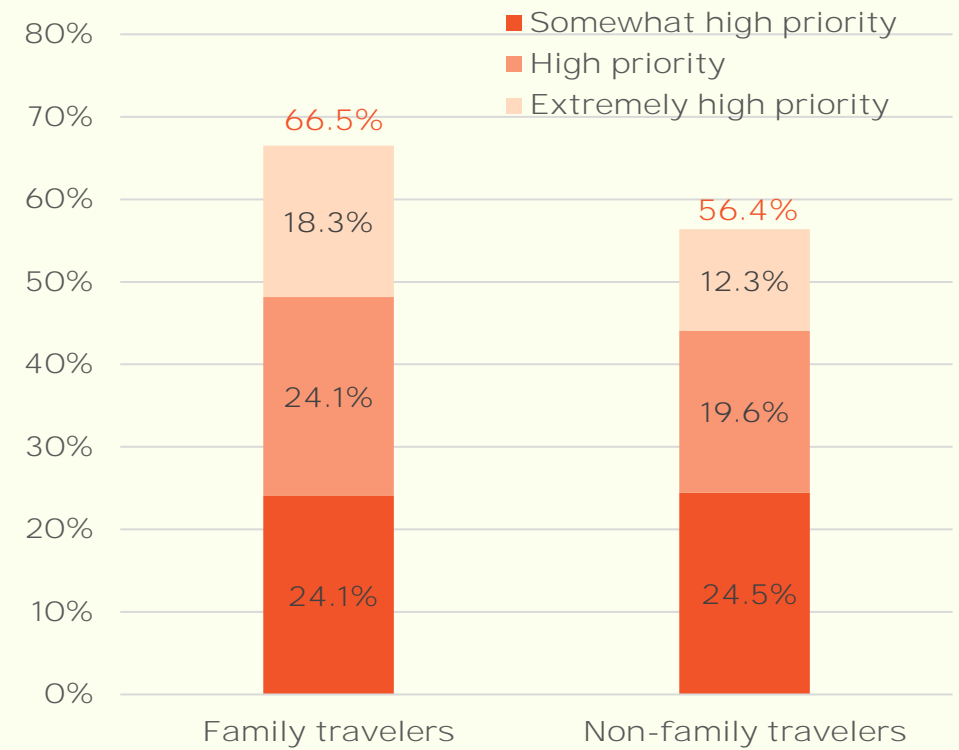
# Families are prioritizing leisure travel

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) \_\_\_\_\_.

### Family travelers

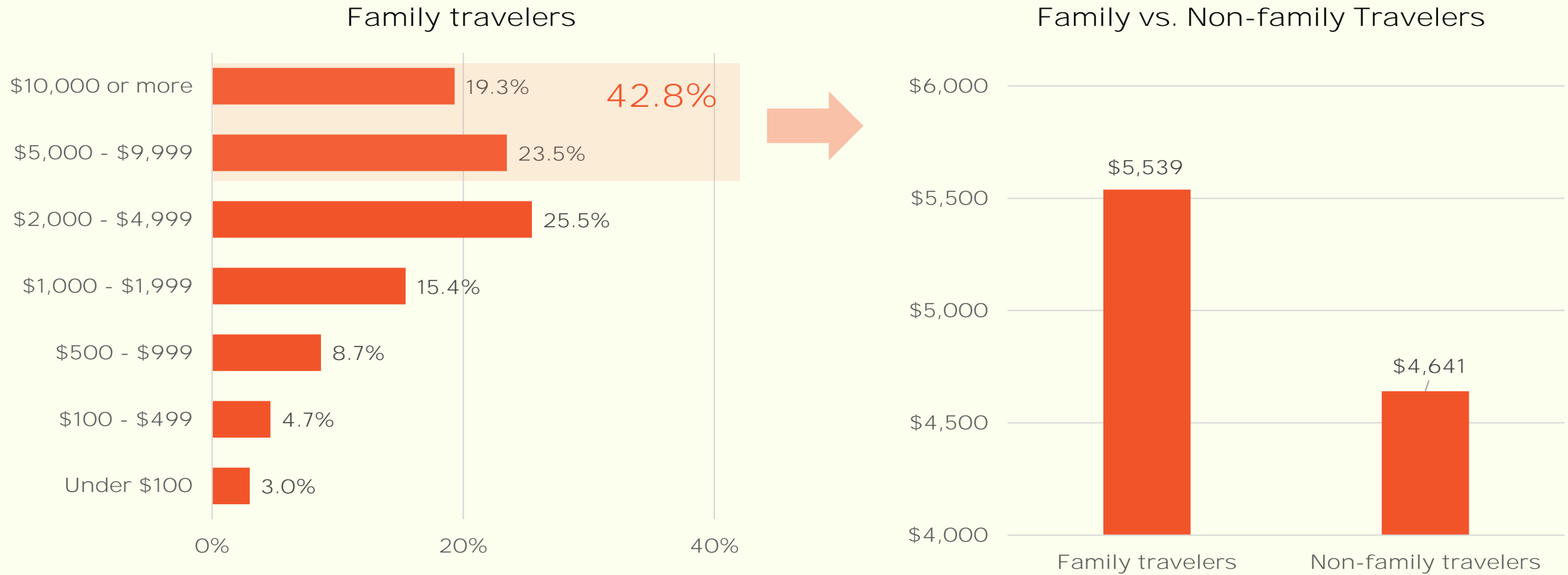


### Family vs. Non-family Travelers



# Family travel budgets are high

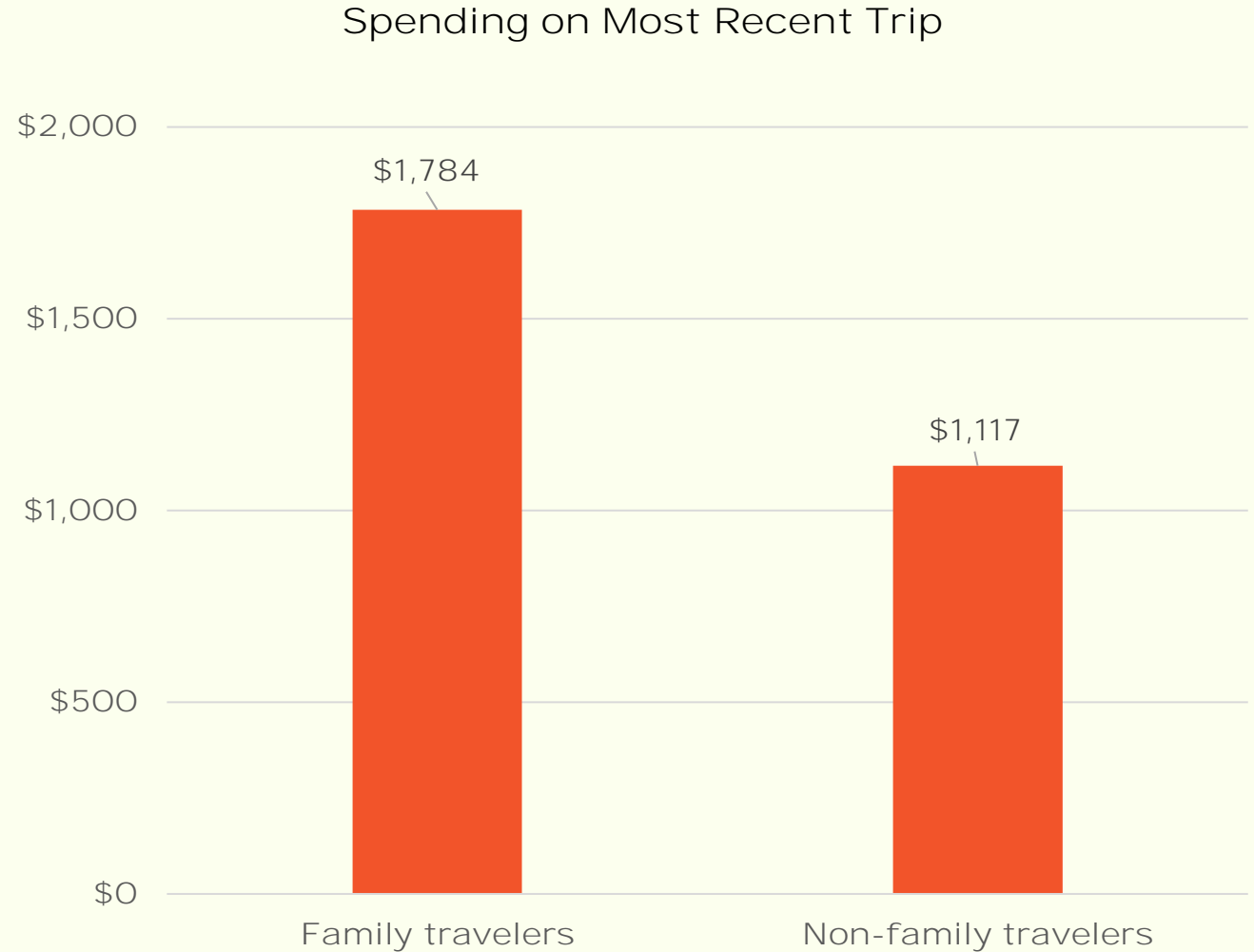
Question: *How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?*





# Spending on most recent trip

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

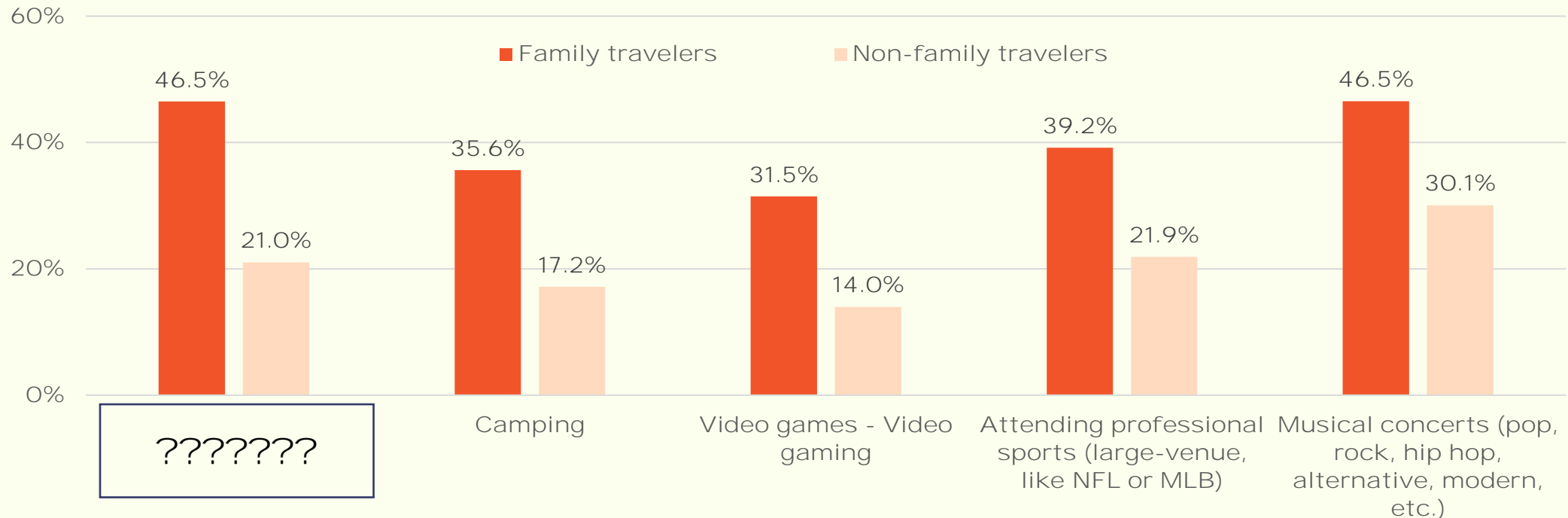


Family travelers are engaged in many pursuits and hobbies.



# Family travelers have many hobbies and passions.

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each. (Top 2 Box Score: “Extremely high interest - I’m passionate about this” or “High interest”)

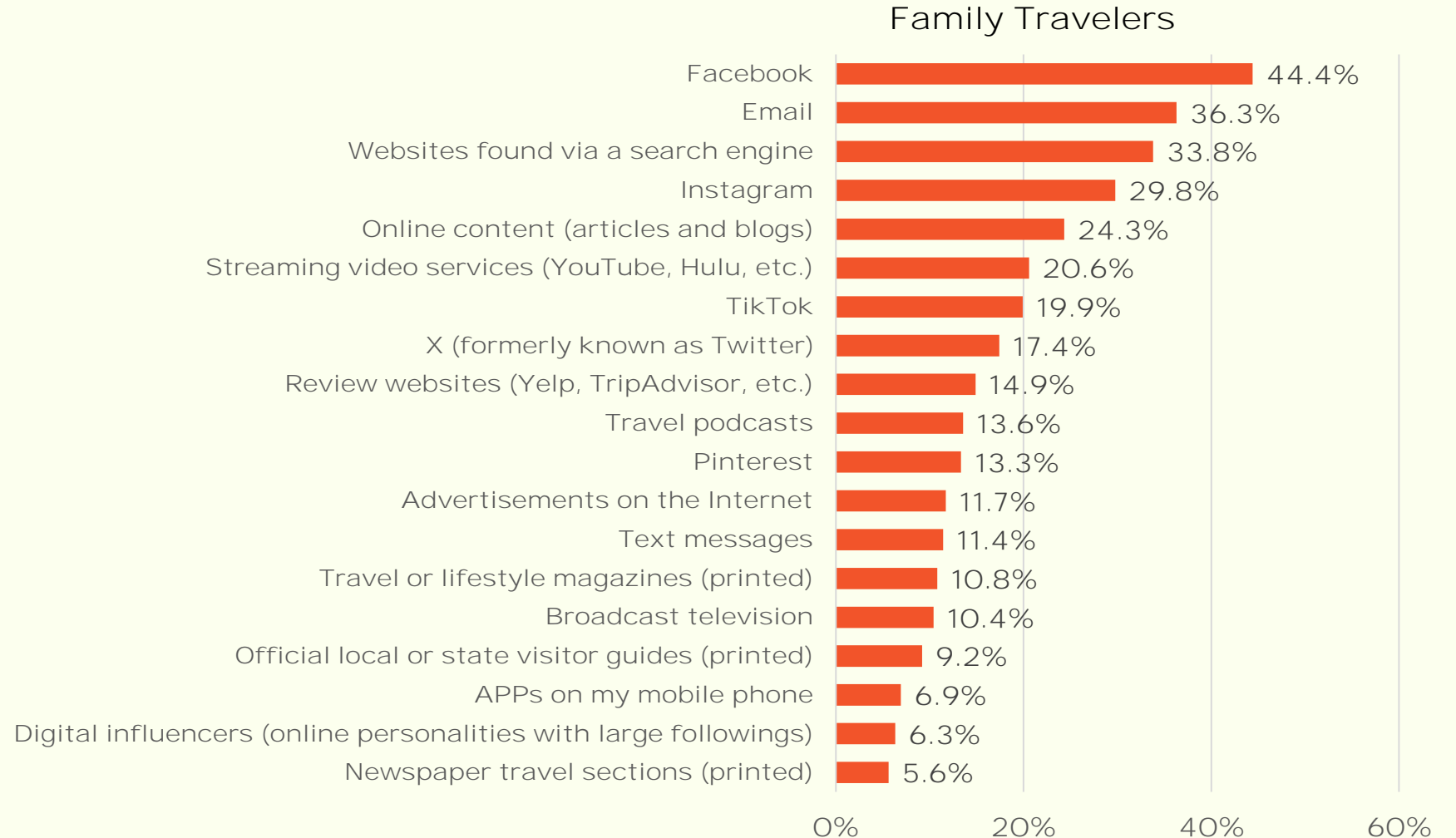


Family travelers are (in many ways) social media-oriented planners



# Family travelers say Facebook, email, and websites are the best way to reach them.

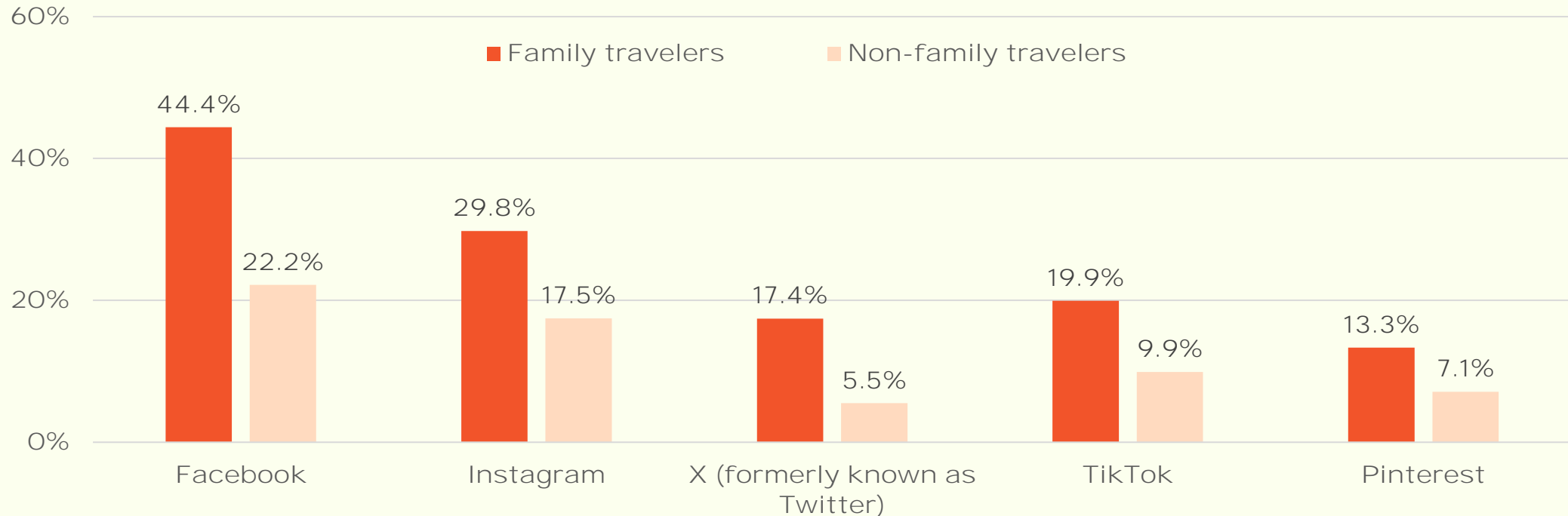
Question: *Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)*



# Social media is strongly preferred by family travelers.

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)*

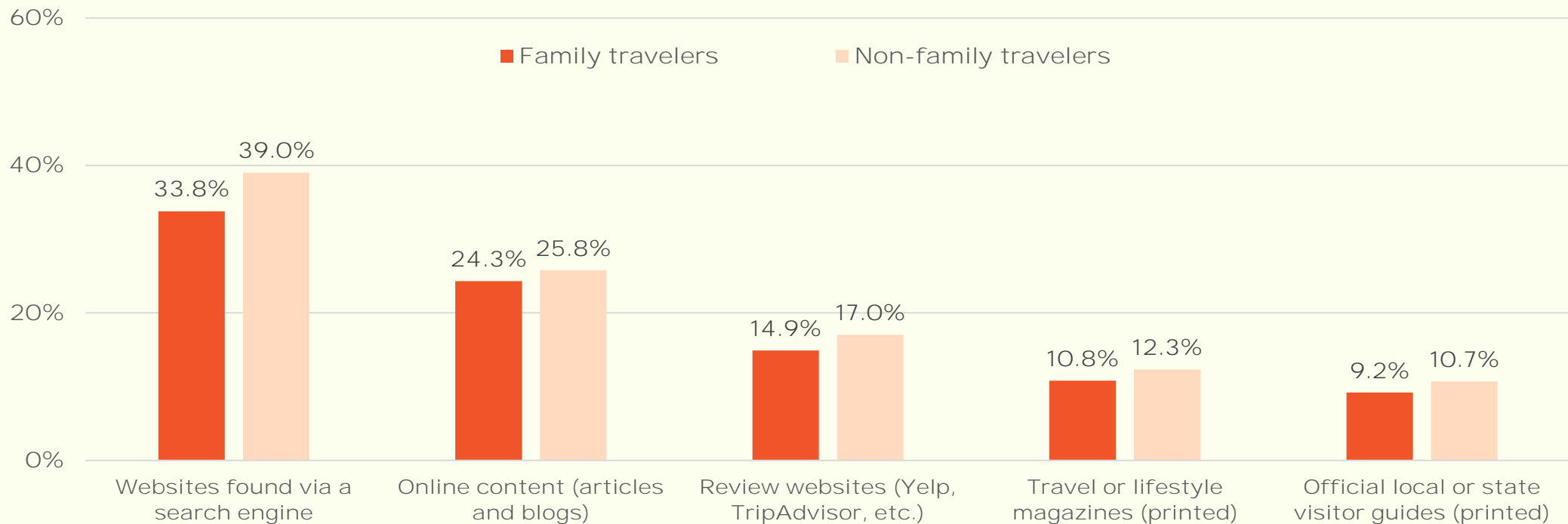
*Top 5: Biggest Positive Differences*



# Family travelers show slightly less reliance on traditional digital channels.

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)

Top 5: Biggest Negative Differences



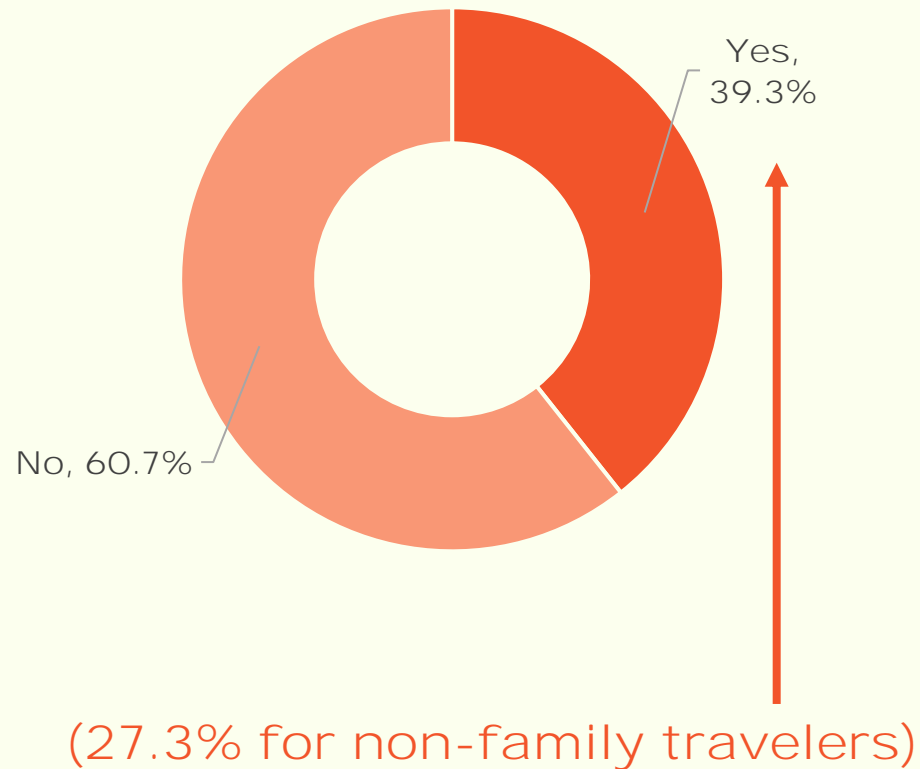
# Family travelers are international travelers



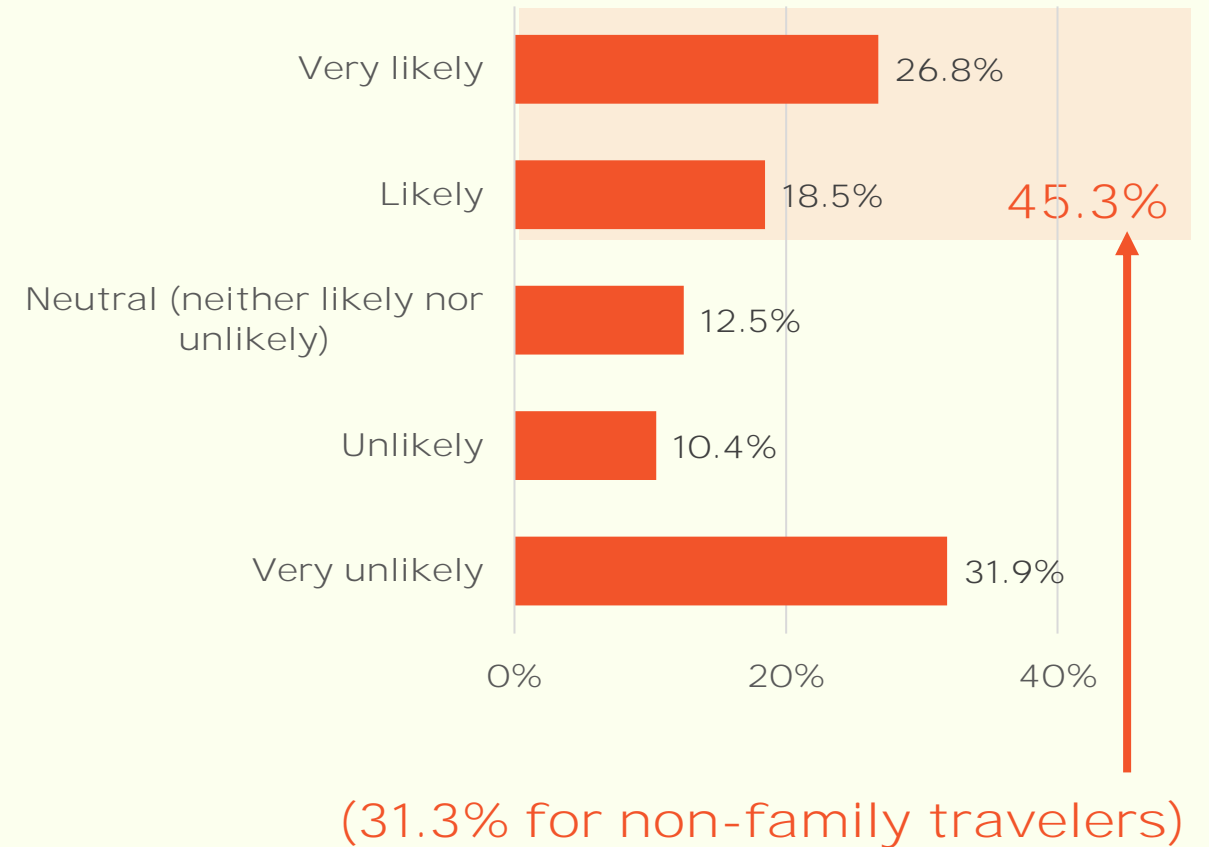


# Families are more likely to travel abroad.

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



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

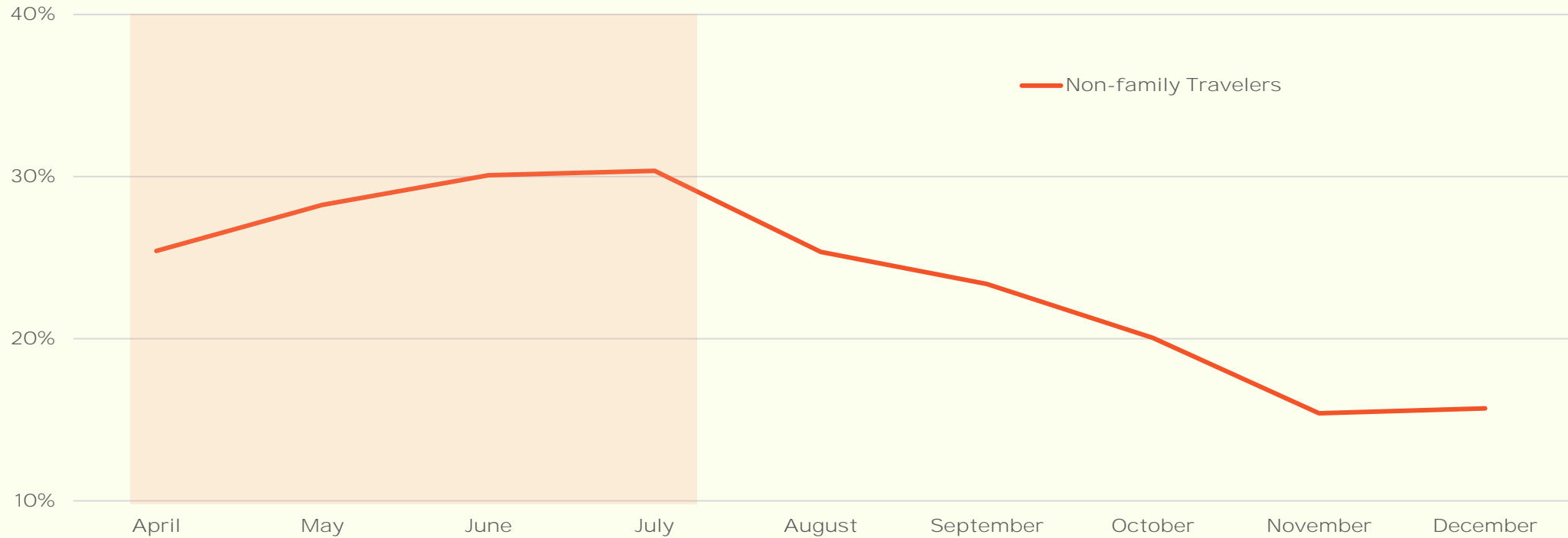


Summertime travel is King with the family traveling set.



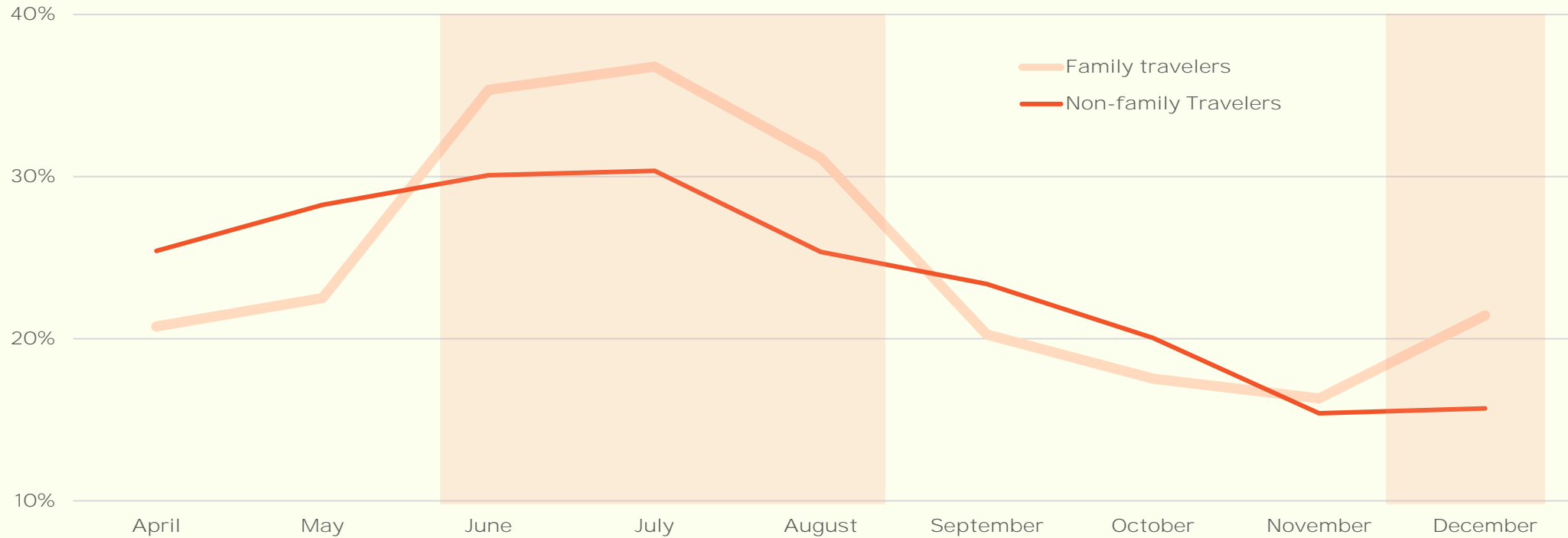
# Summertime is family time.

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



# Summertime

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



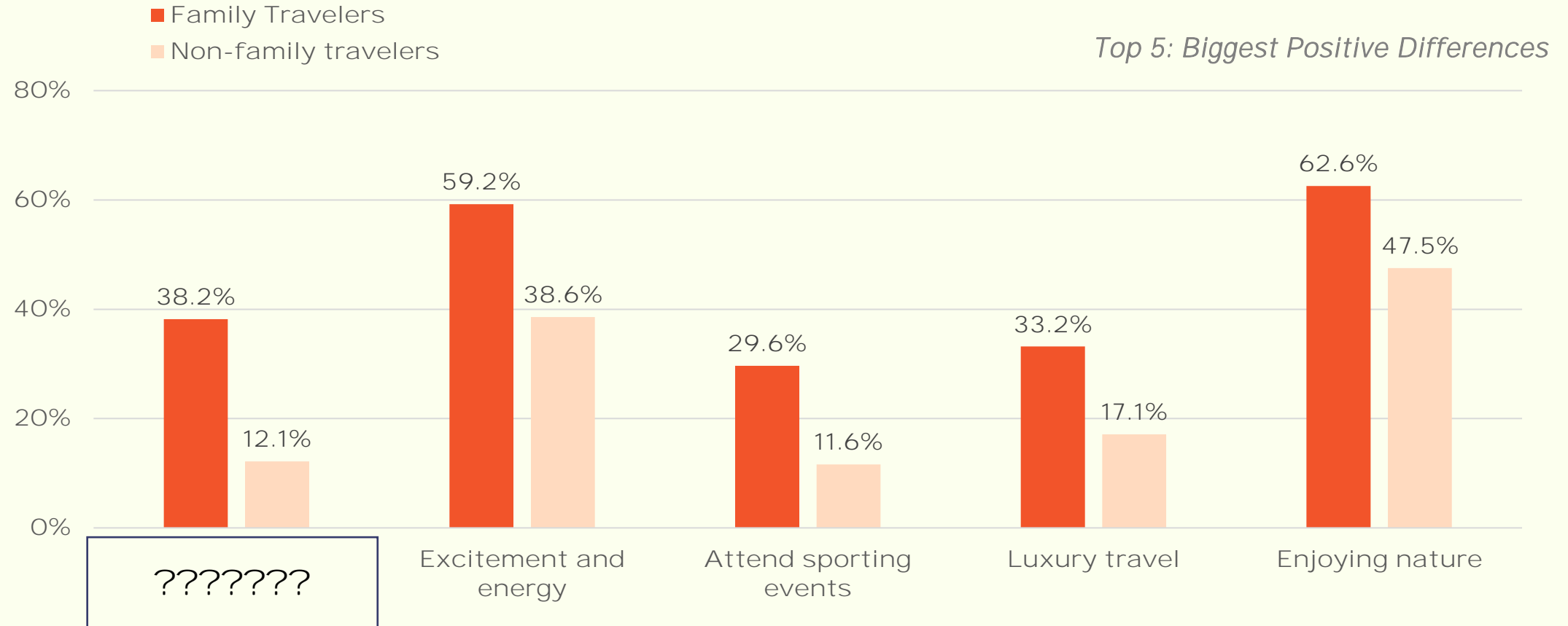
# Prioritizing time with loved ones, nature, excitement and seeing new places.

Question: *Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?*



# Differences: Prioritized travel experiences

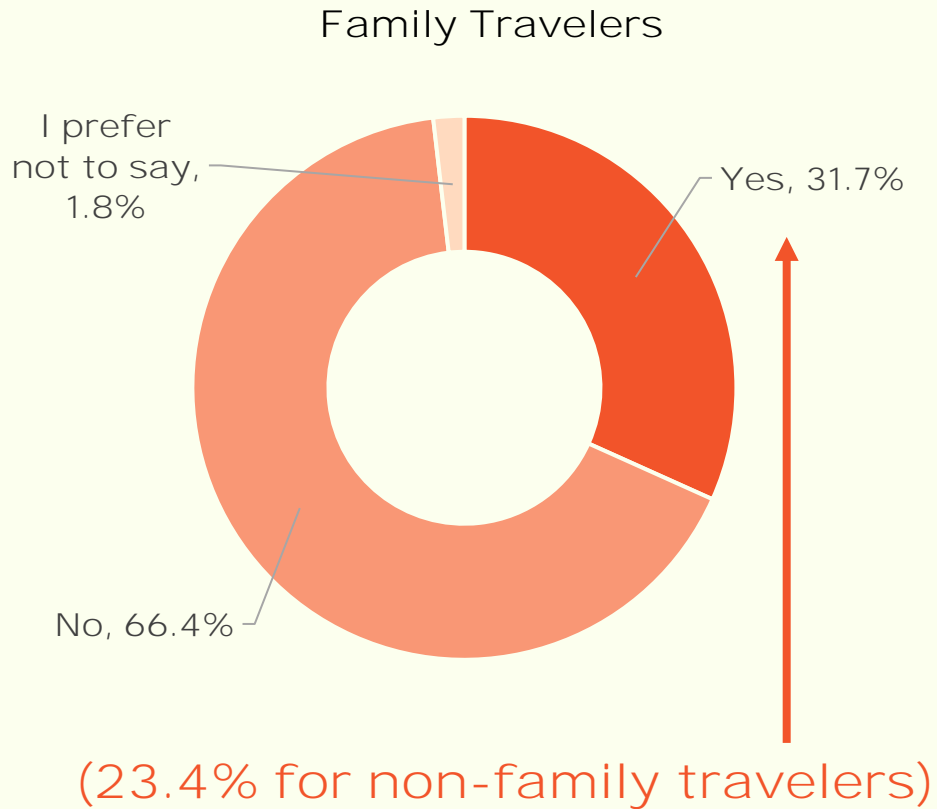
Question: *Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?*



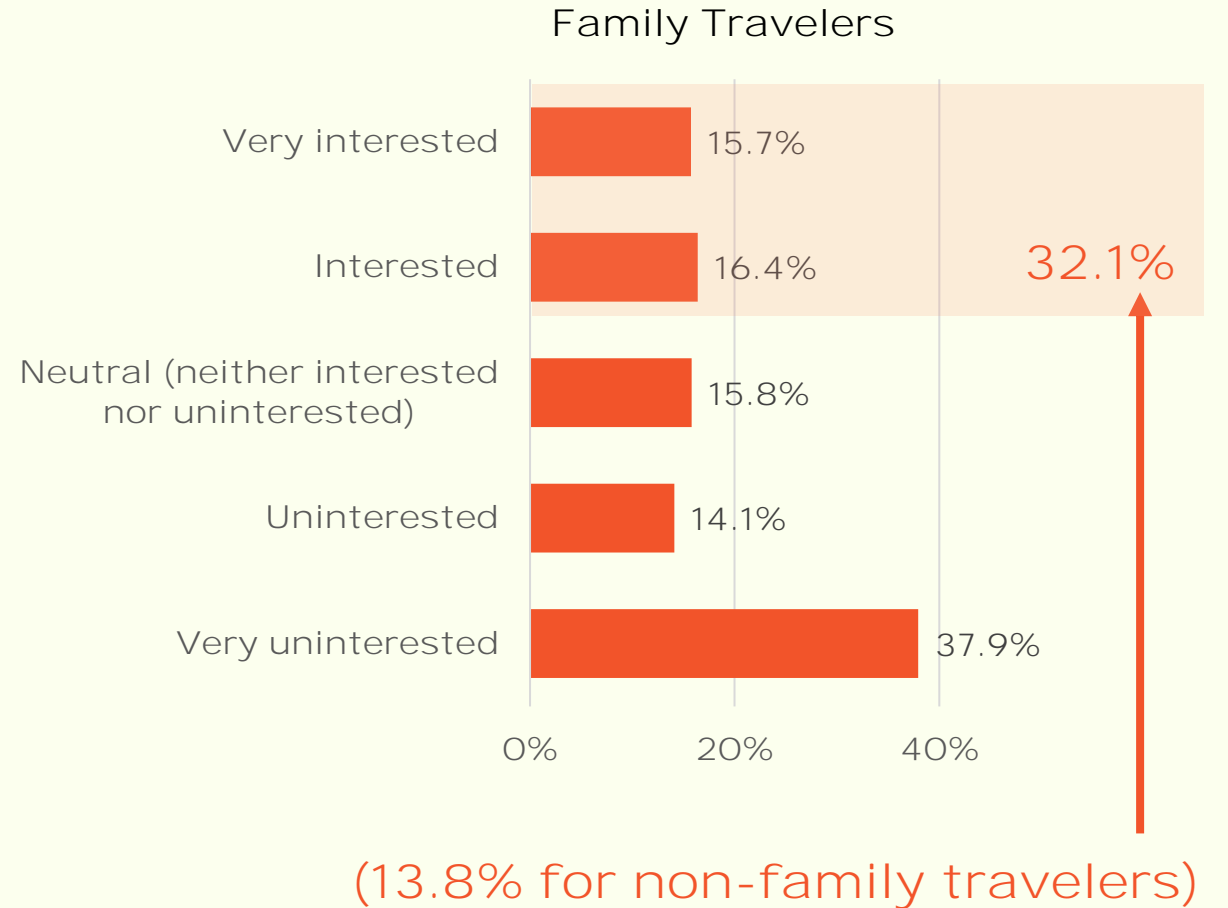
Some final thoughts on family travel.

# Stress management?

Question: *Do you consume cannabis or cannabis-derived products?*



Question: *How interested would you be in psychedelic tourism?*





# 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*





Join us for  
The State of the  
International Traveler  
Livestream

May 1 (12 Noon PST)





# Passion Profiles



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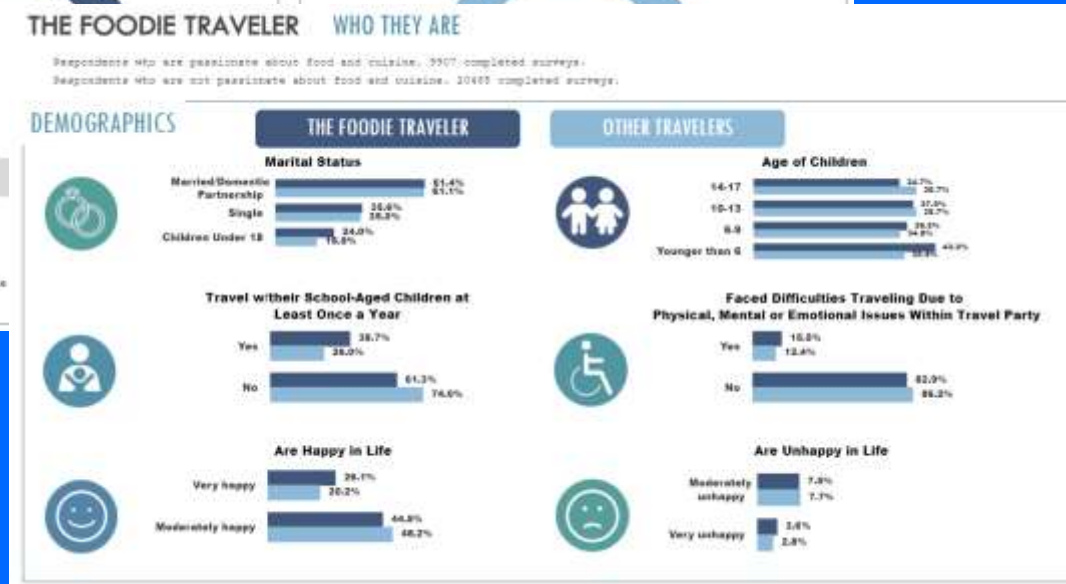
# Passion Profiles

- *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*

# Passion Profiles



Scan to learn more



# Thank You!

*May Livestream  
Registration*

