

# The State of the American Traveler

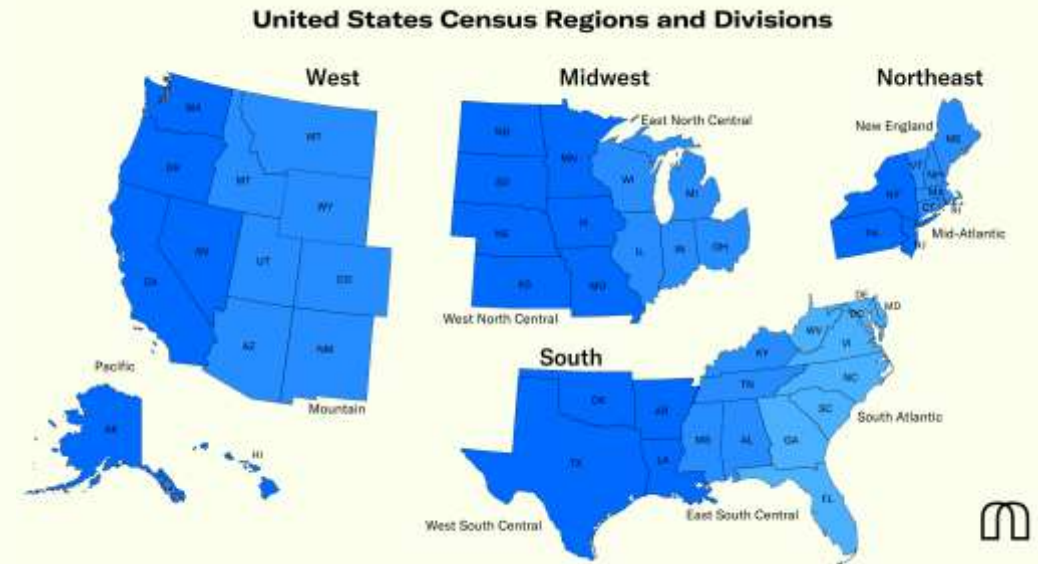


**Future Partners**

*October 2024*

# Methodology

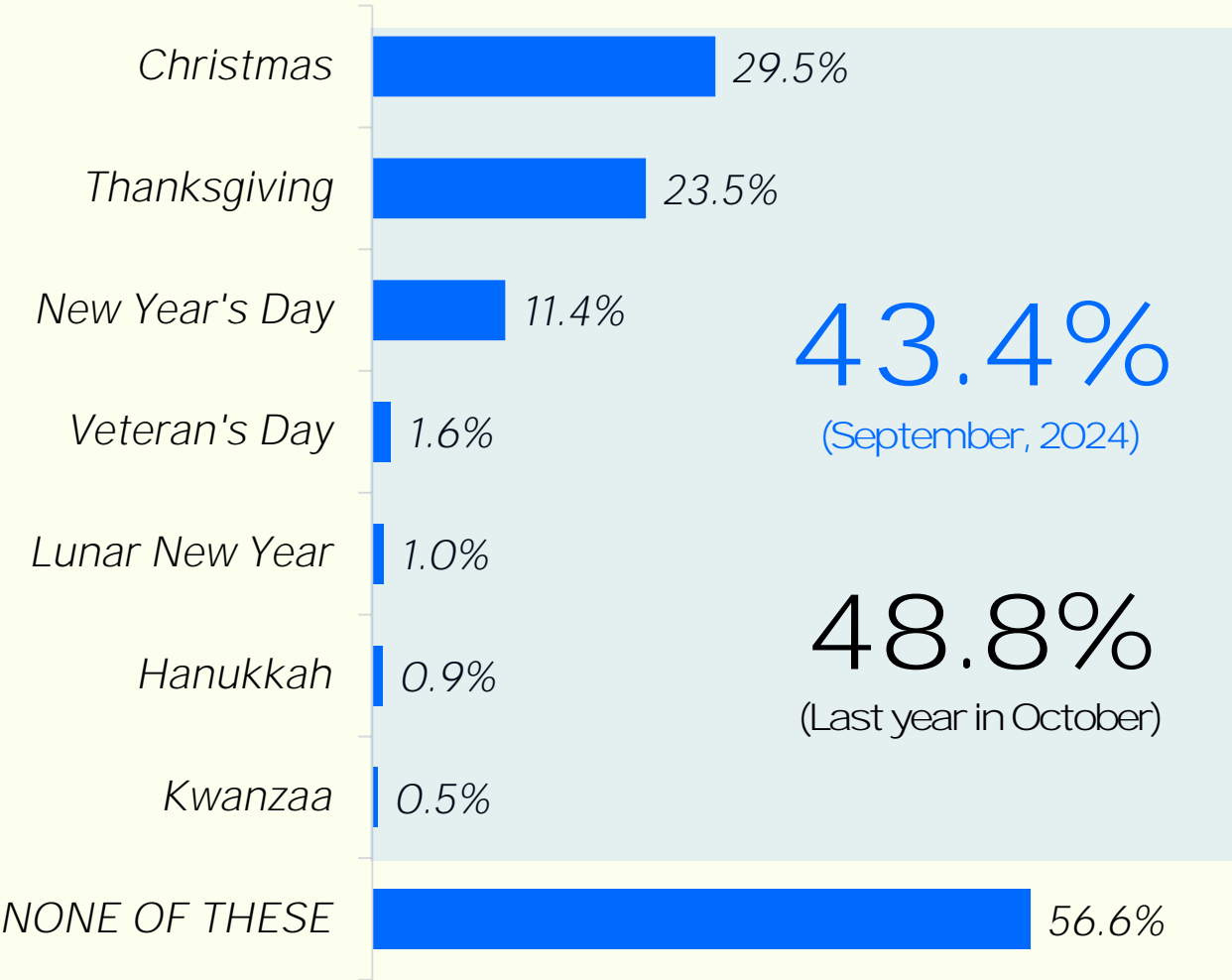
- *Monthly tracking survey*
- *Representative sample of adult American travelers in each of four U.S. regions*
- *Tracks traveler sentiment to generate insights into domestic travel trends*
- *Survey collected: [September 16-27](#)*
- *4,000+ fully completed surveys collected each wave*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



November Livestream  
Registration

# Holiday travel expectations are on track for a solid pperformance this year.

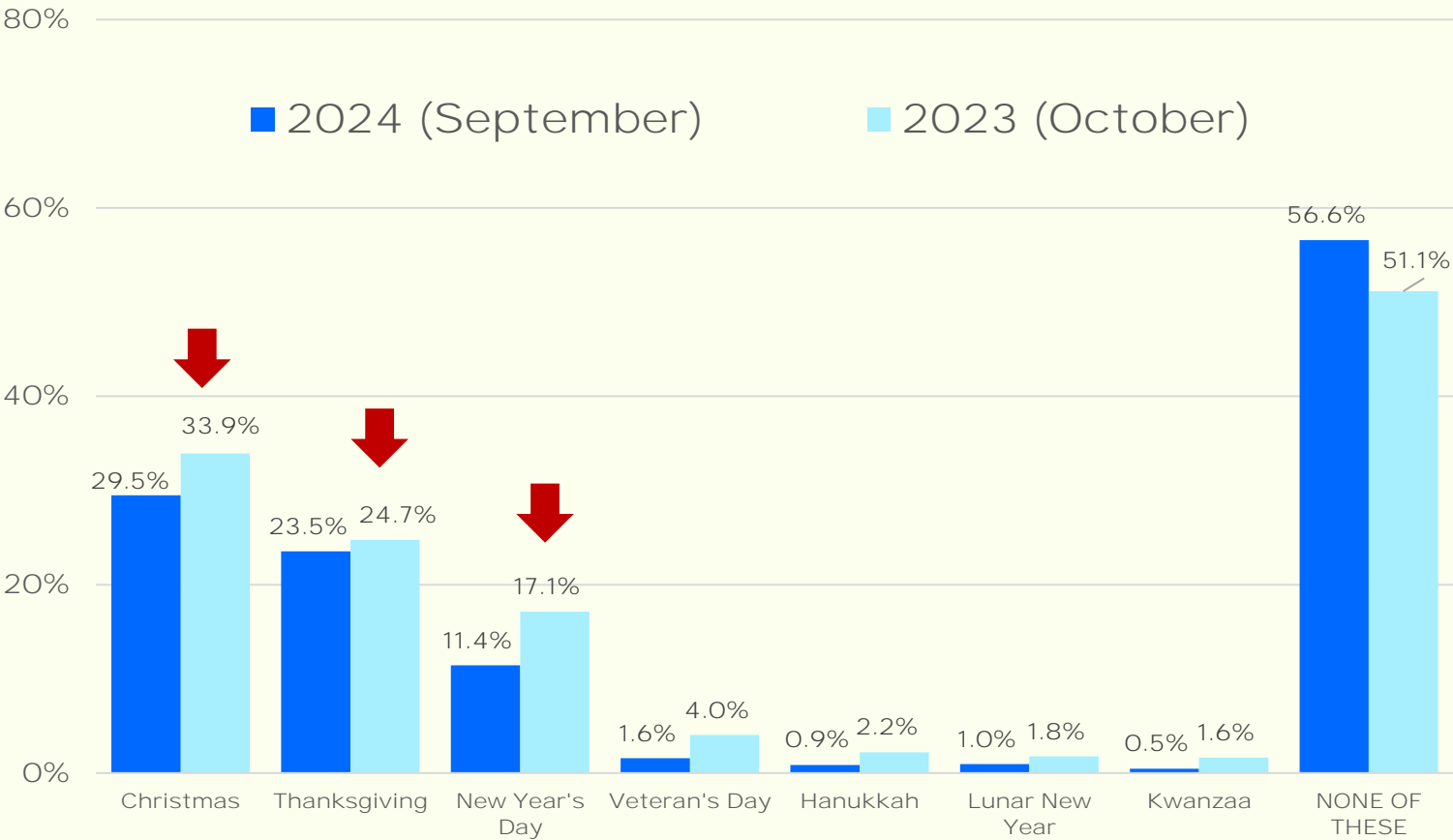
Question:  
*Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays?*



# Holiday travel expectations are on track for a solid performance this year.

## Question:

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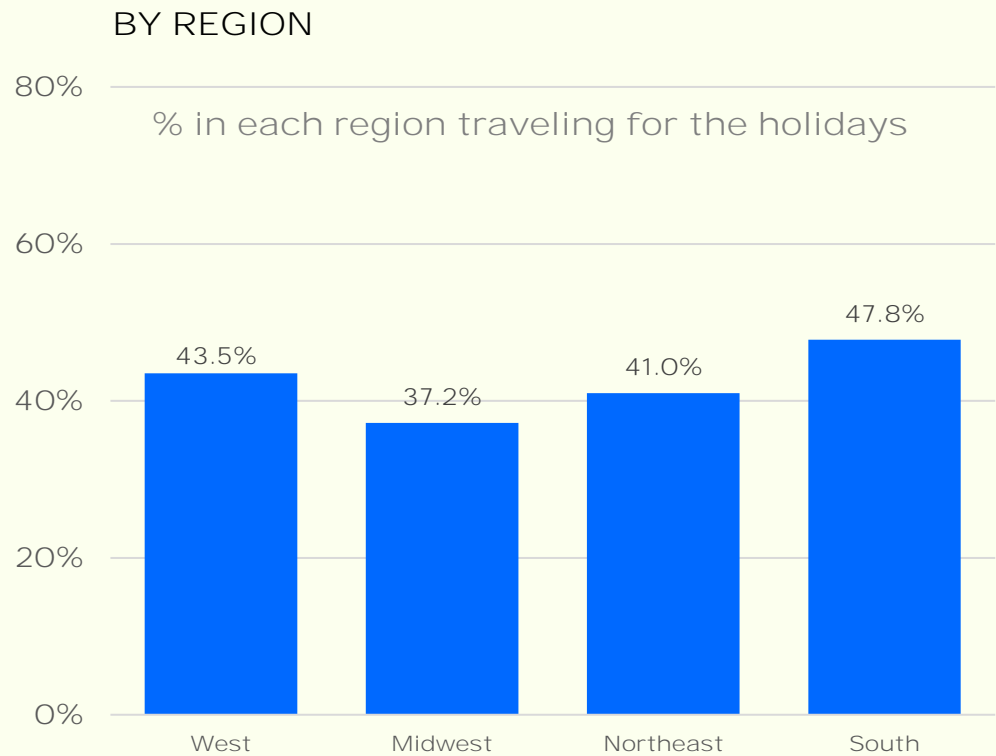
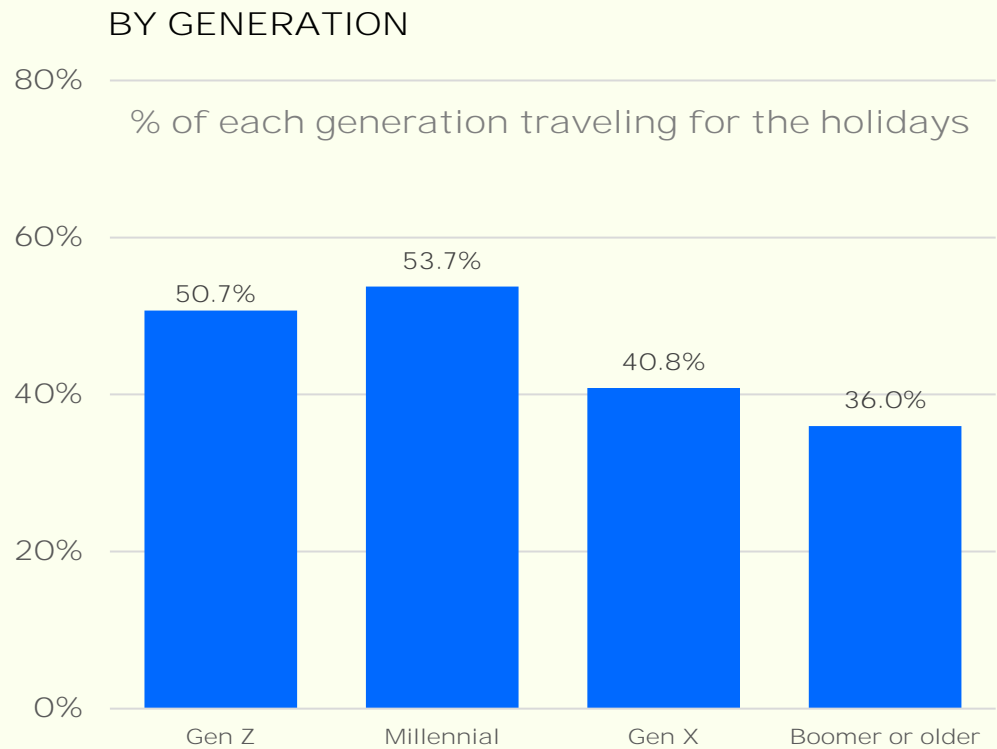




# Younger segments will drive volume, and more travel is expected to come from the South and West.

Question:

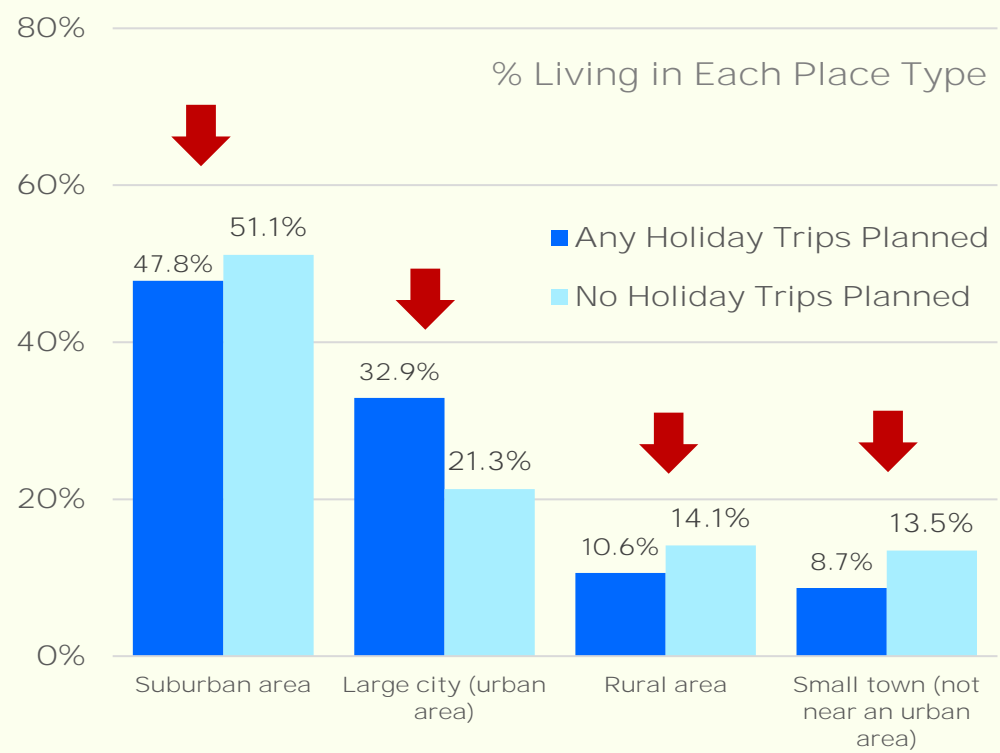
*Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays?*



# Urban Exodus: Higher-income urbanites will also drive holiday season travel volume.

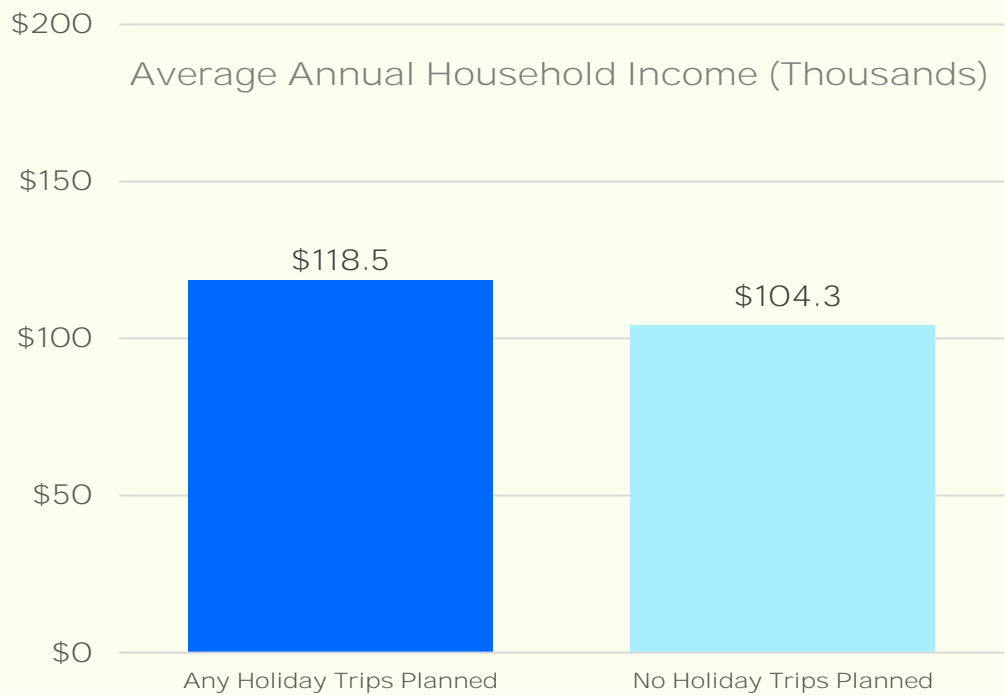
Question:

*Which best describes where you live?*



Question:

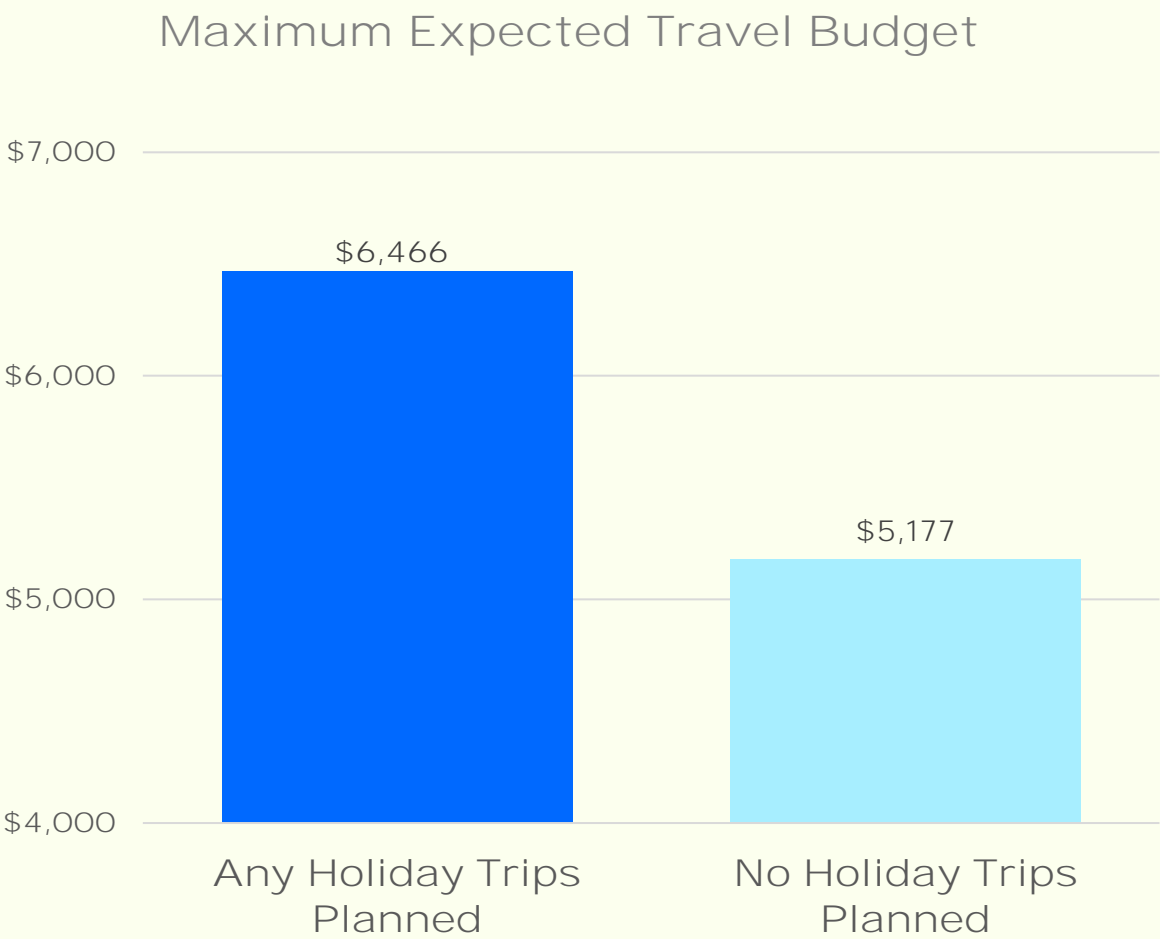
*Which best describes the combined annual income of all members of your household?*



# Holiday travelers' wallets are fatter.

Question:

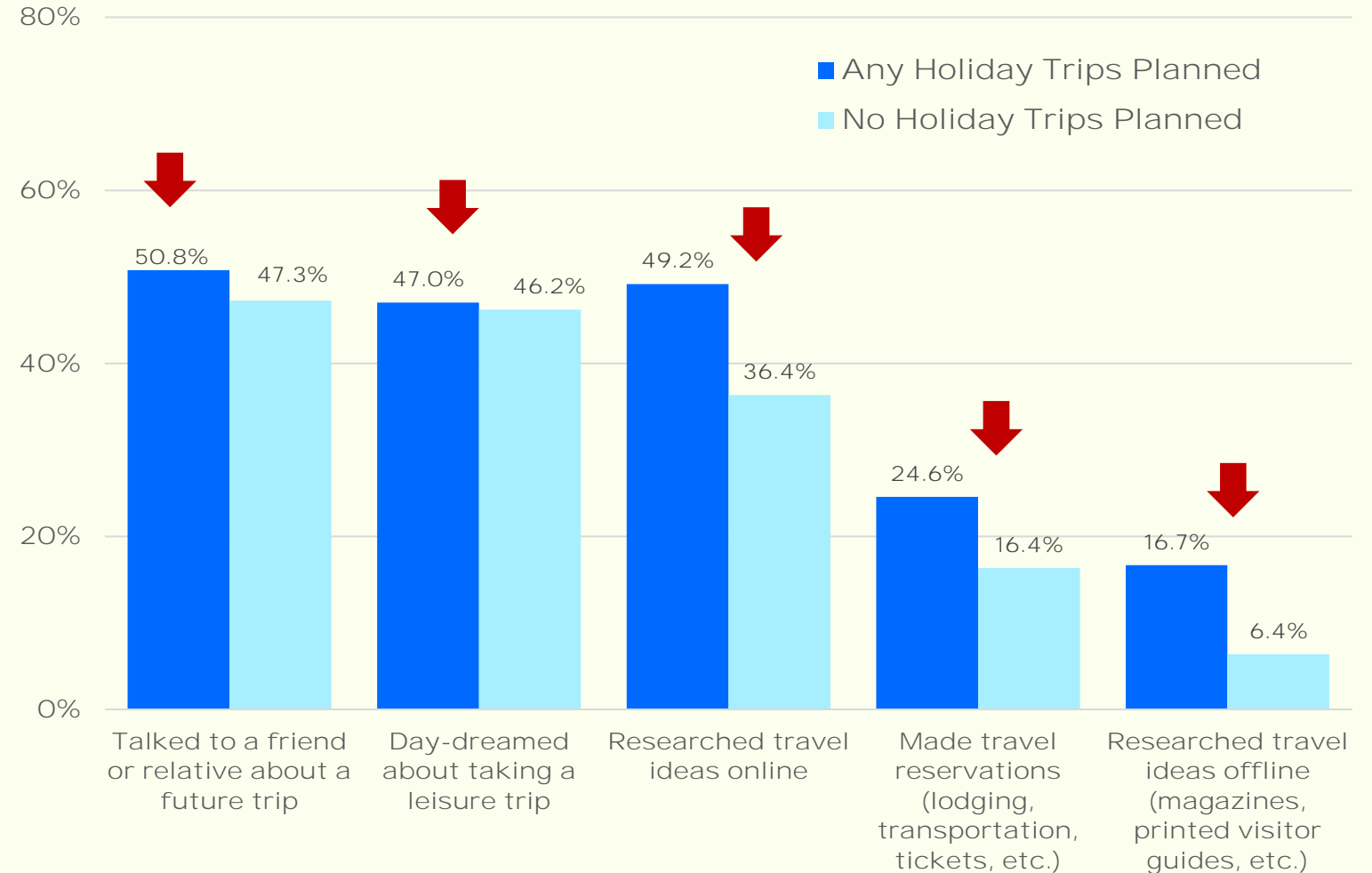
*How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?*



# They're out there planning holiday travel, right now.

## Question:

*In the PAST WEEK, which of the following have you done?*

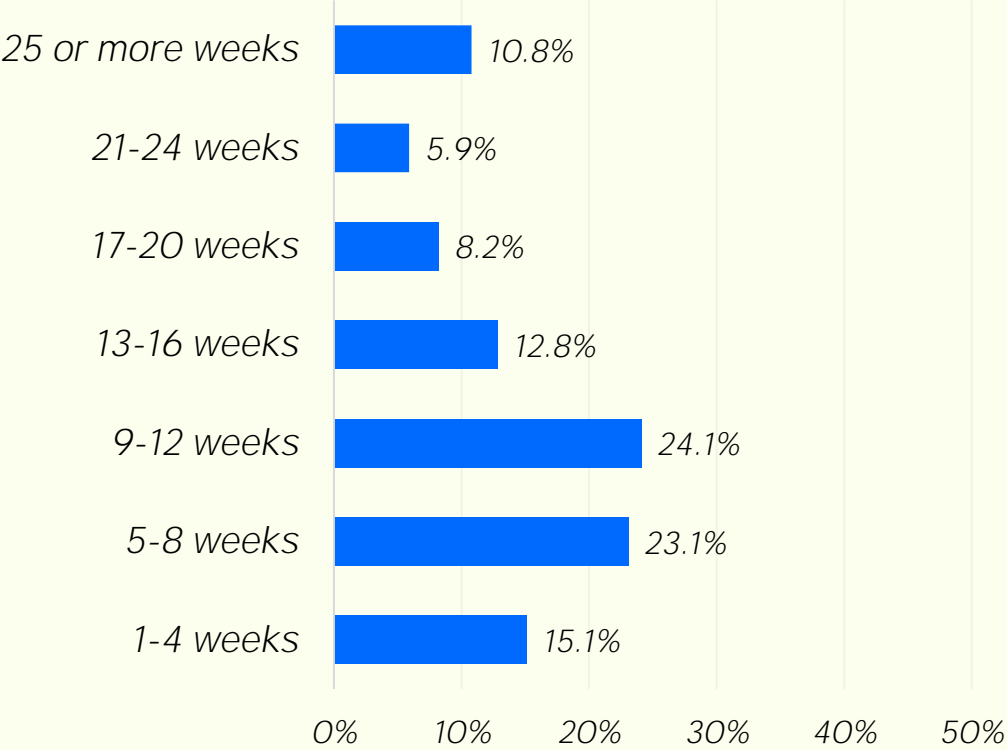




# The typical holiday traveler begins travel planning 12 weeks out.

Question:

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



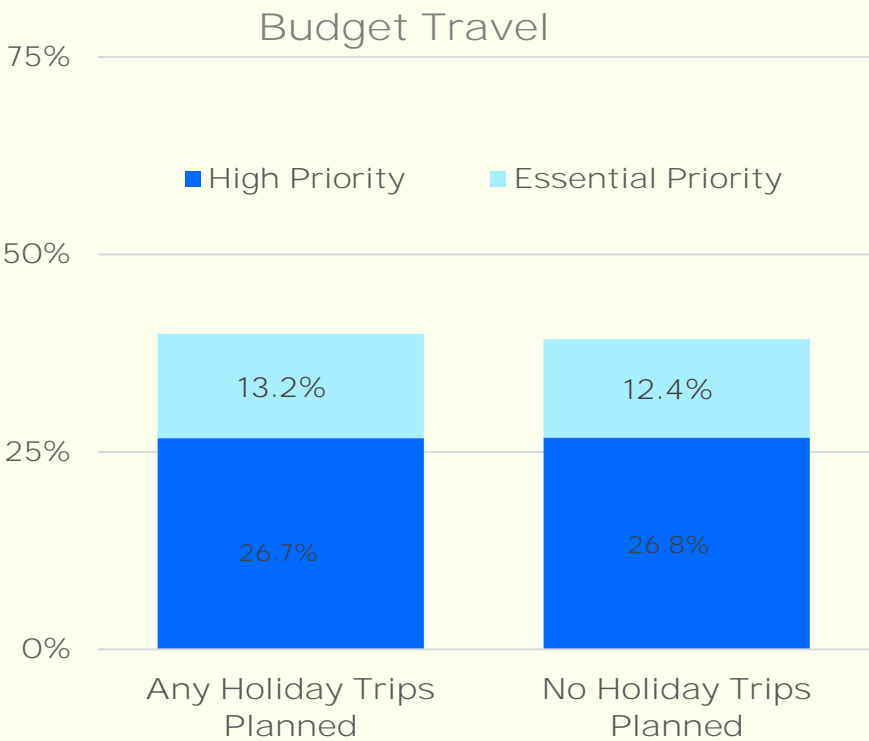
11.8  
Weeks

*Average trip planning length for travelers  
planning holiday trips this year.*

# With this group there is an opportunity to sell upgraded product.

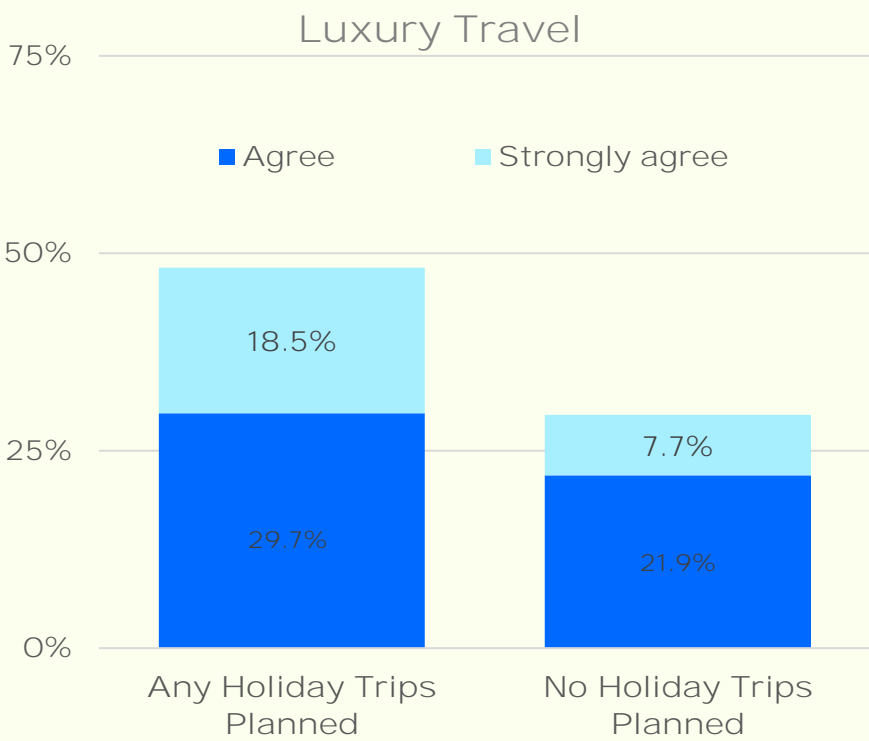
## Question:

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



## Question:

*How much do you agree or disagree with this statement? “Having luxury travel experiences is usually an important part of my leisure trips.”*



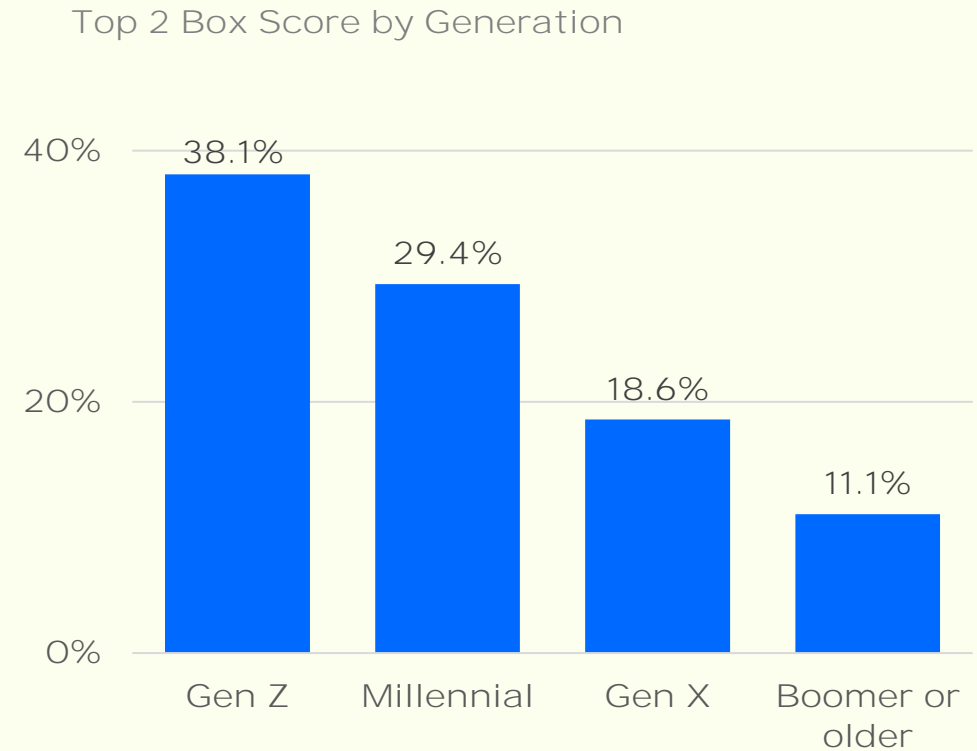
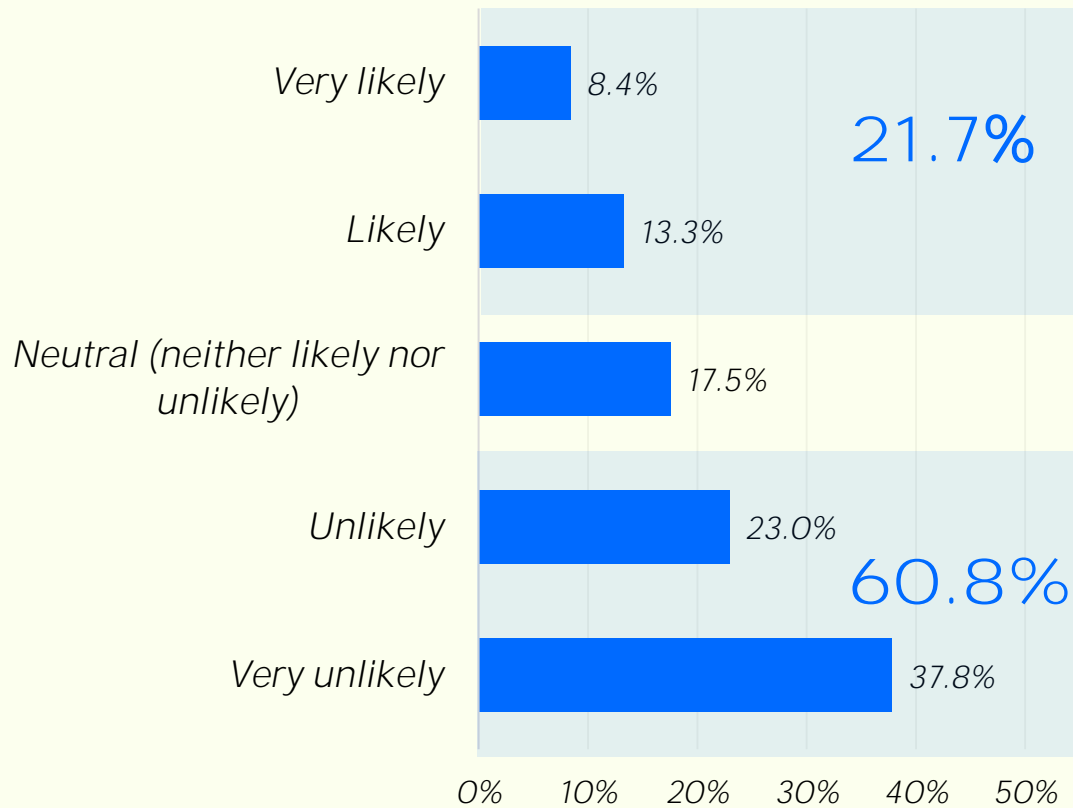
- Based on current sentiment, we expect that the holiday travel season will be robust.
- Volume will be driven by younger urbanites with an elevated taste for luxury travel experiences.



# Politics May Intrude.

Question:

*How likely is it that political disagreements with family members will create challenges or tension during your holiday travel?*





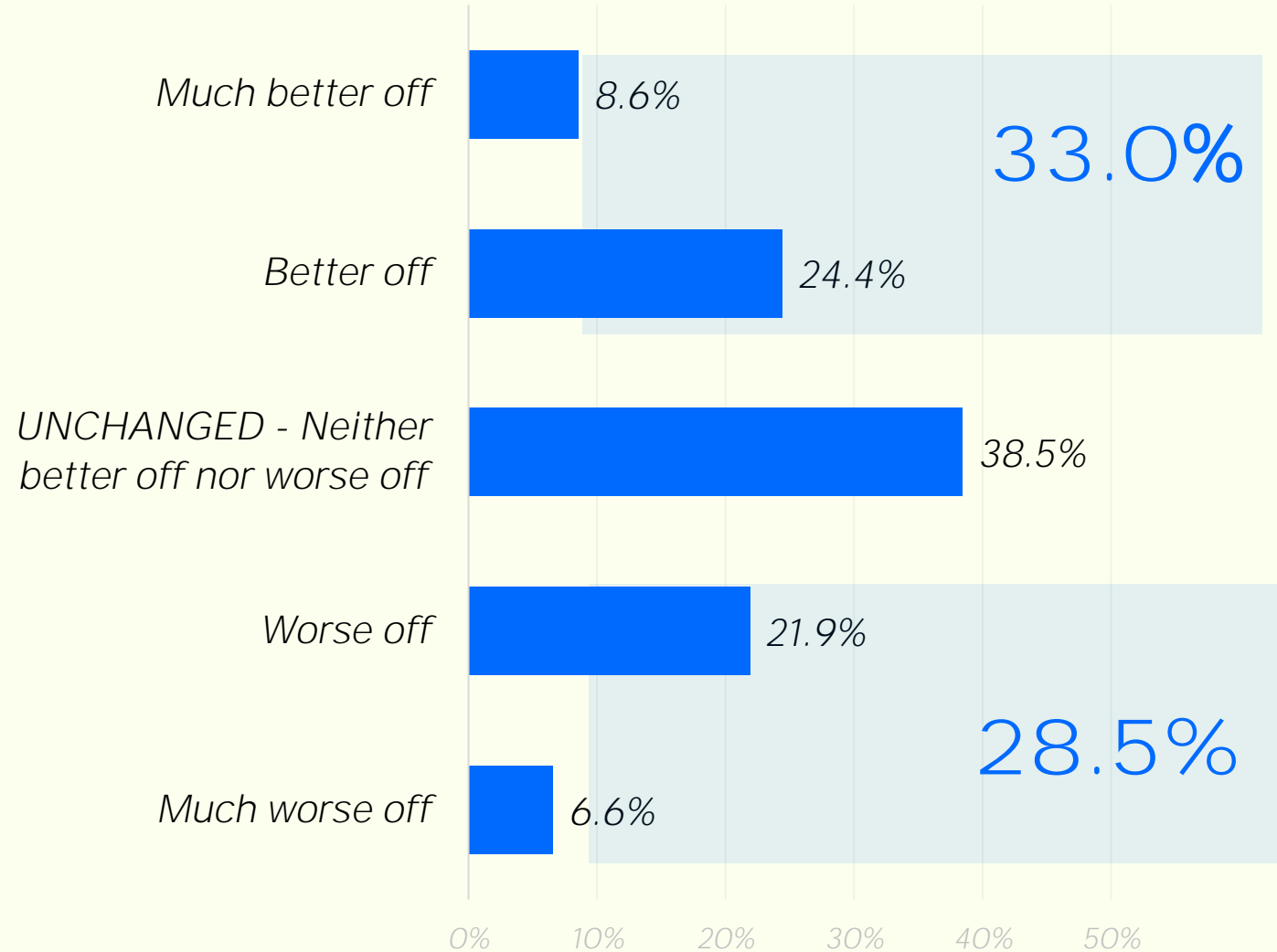


# Traveler Sentiment

# Travelers' feelings about their current finances improved this month.

Question:

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





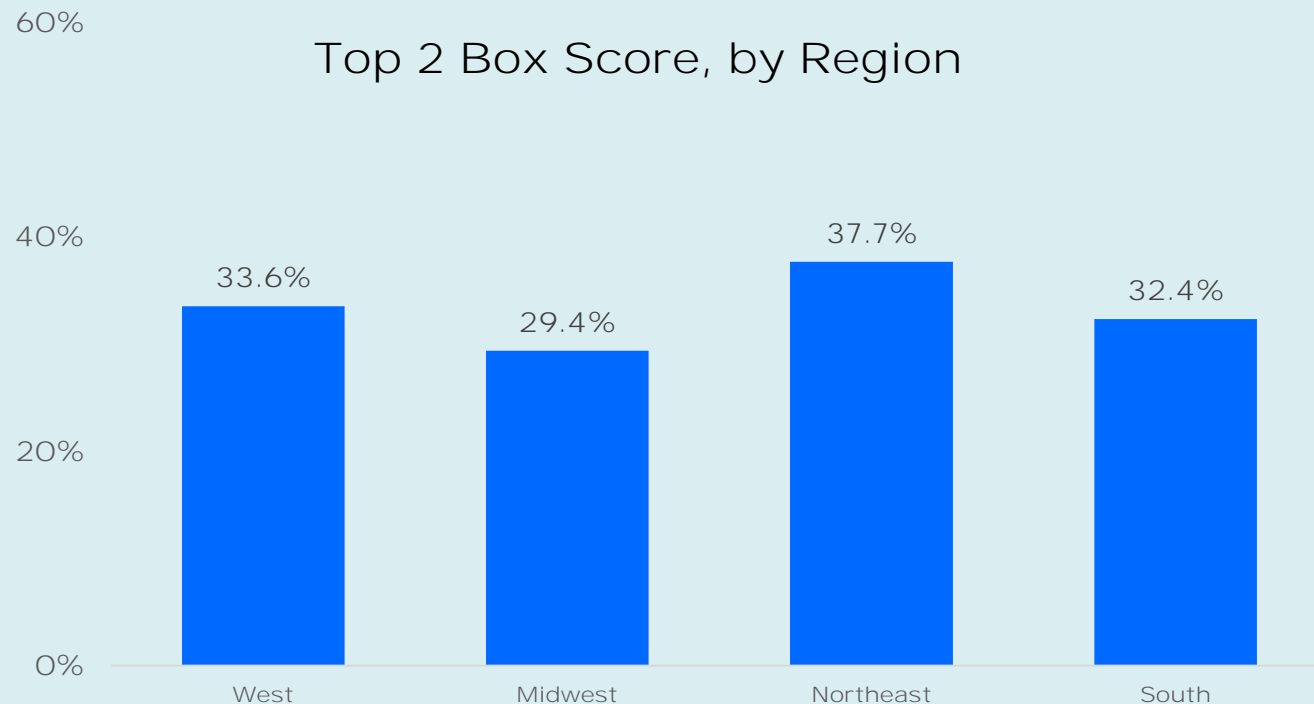
# Overall, the proportion of travelers feeling “better off financially” has improved significantly from last year.

Question:

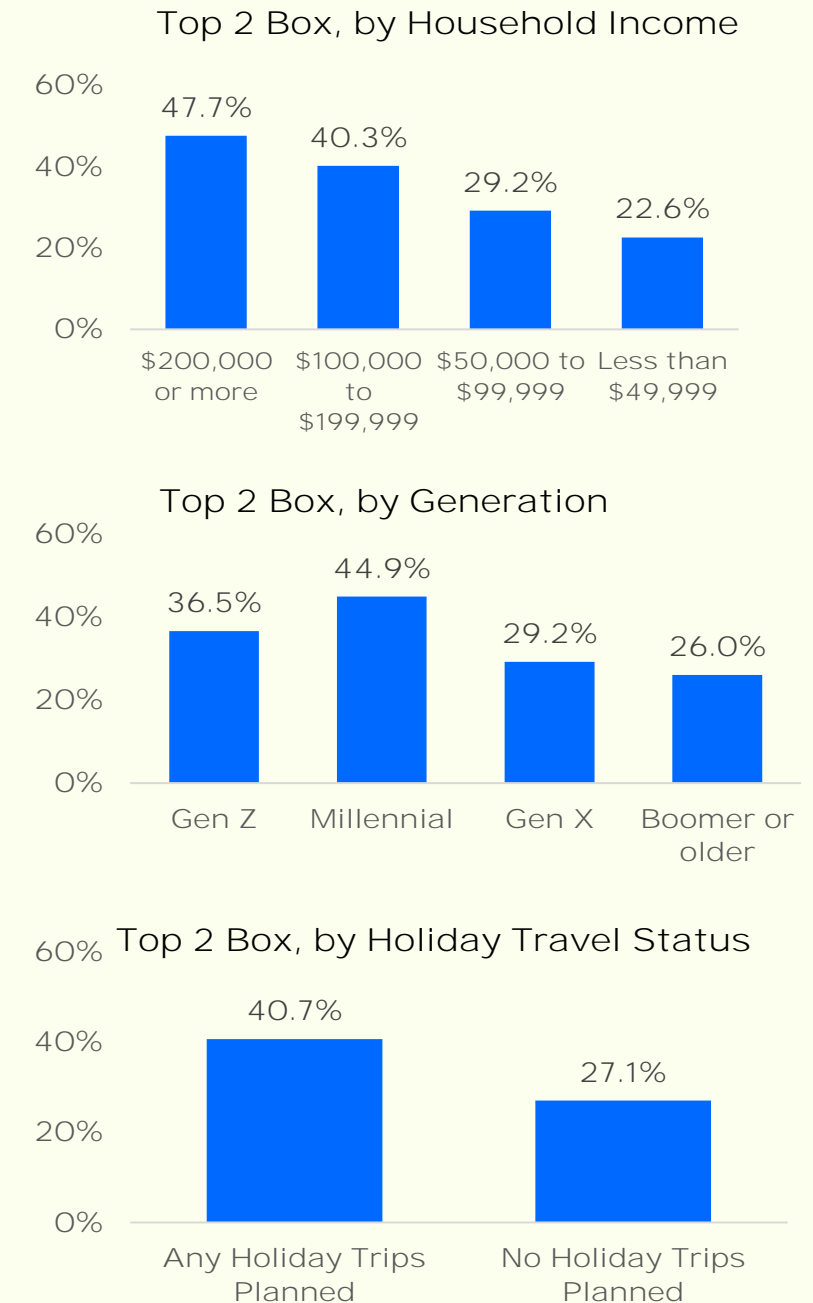
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Regionally, this metric shows the most strength in the Northeastern United States.



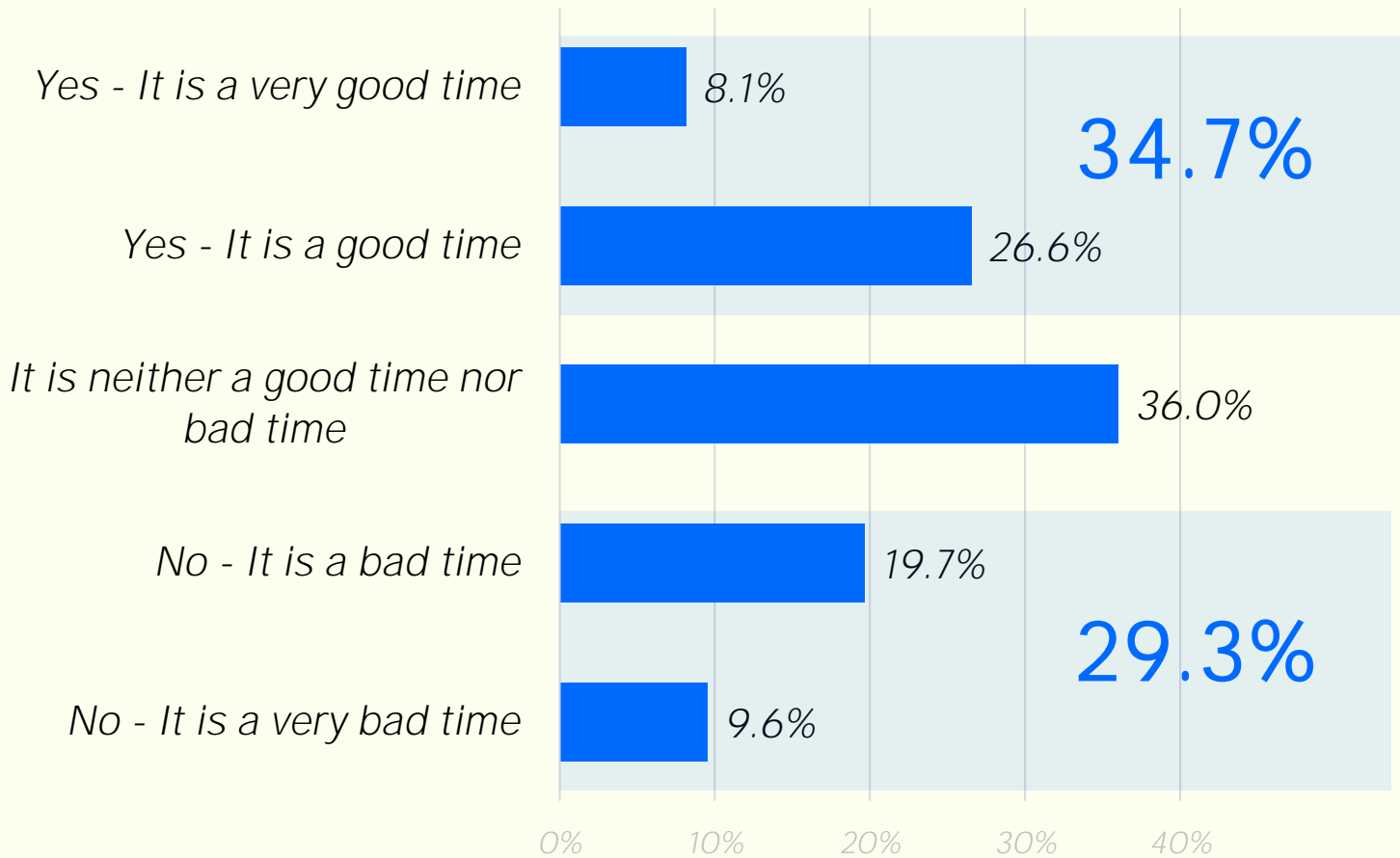
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



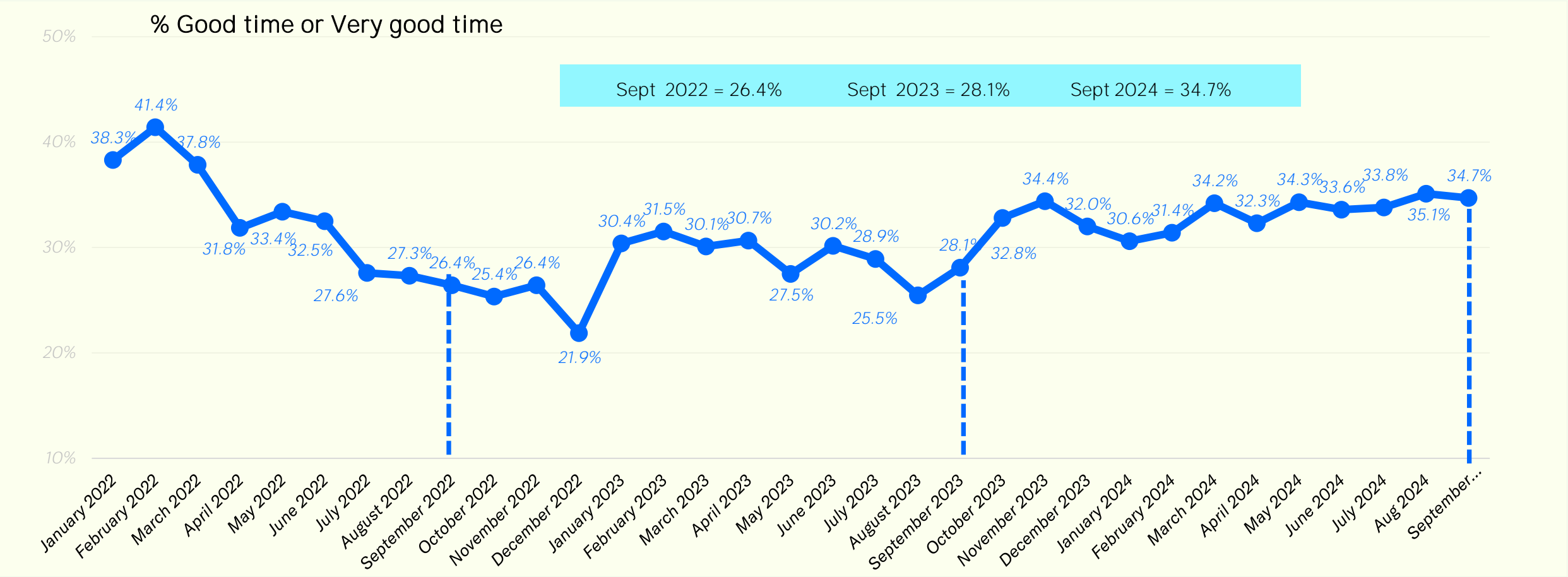
# Travelers remain mostly split on if now is a good time to spend on leisure travel.

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?*

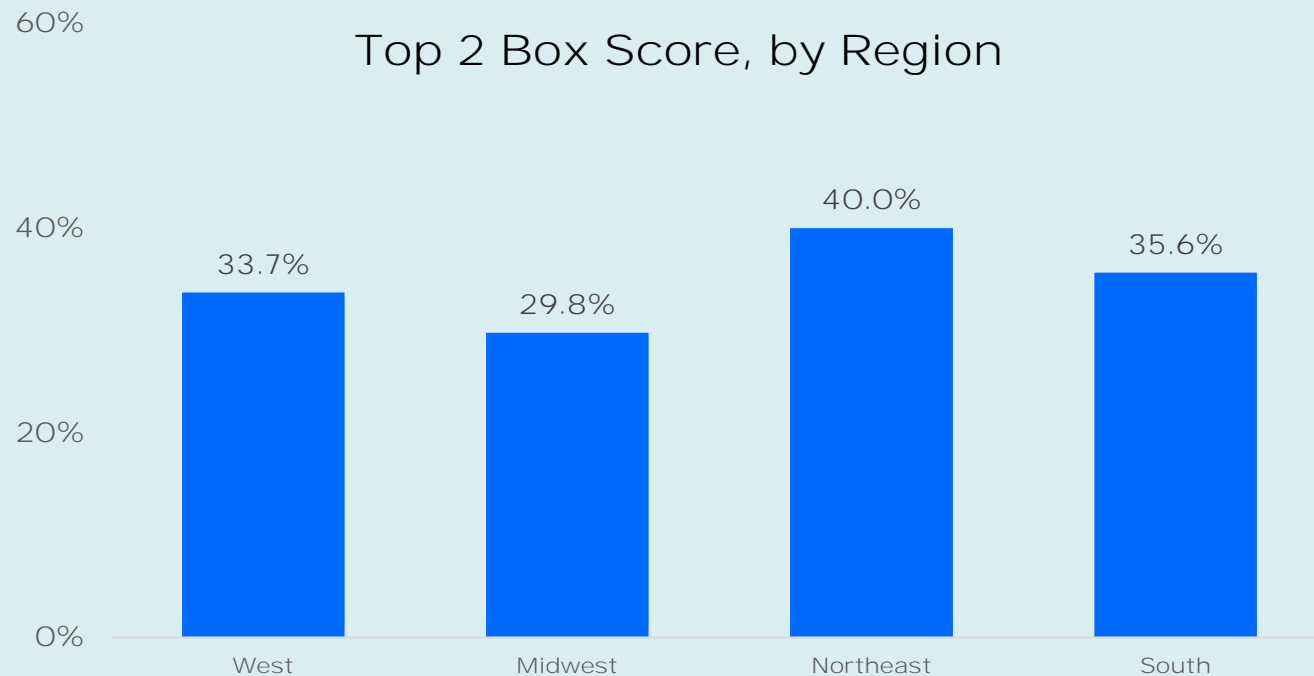


This sentiment has more or less remained unchanged over the past half year.



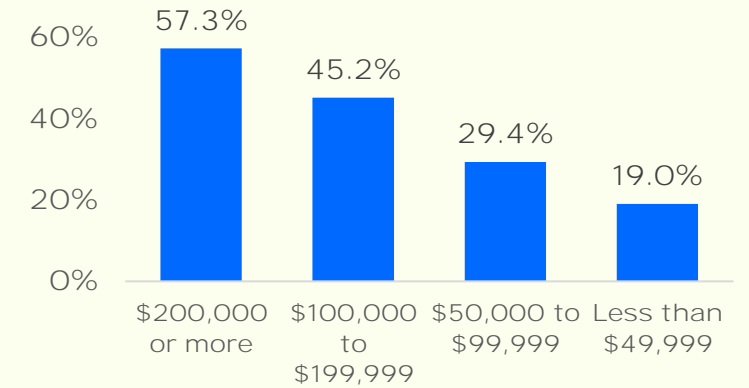
Regionally, again the northeast shows the highest level of strength.

Top 2 Box Score, by Region

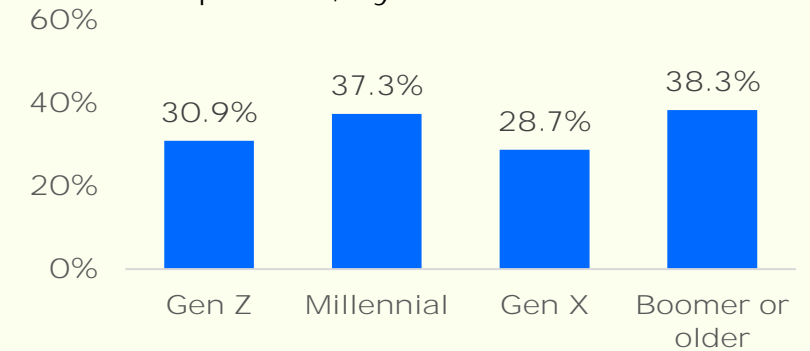


Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

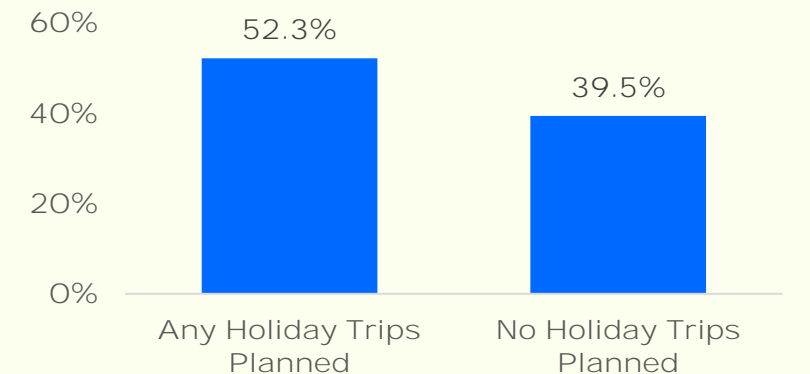
Top 2 Box, by Household Income



Top 2 Box, by Generation



Top 2 Box, by Holiday Travel Status



# Looking Forward

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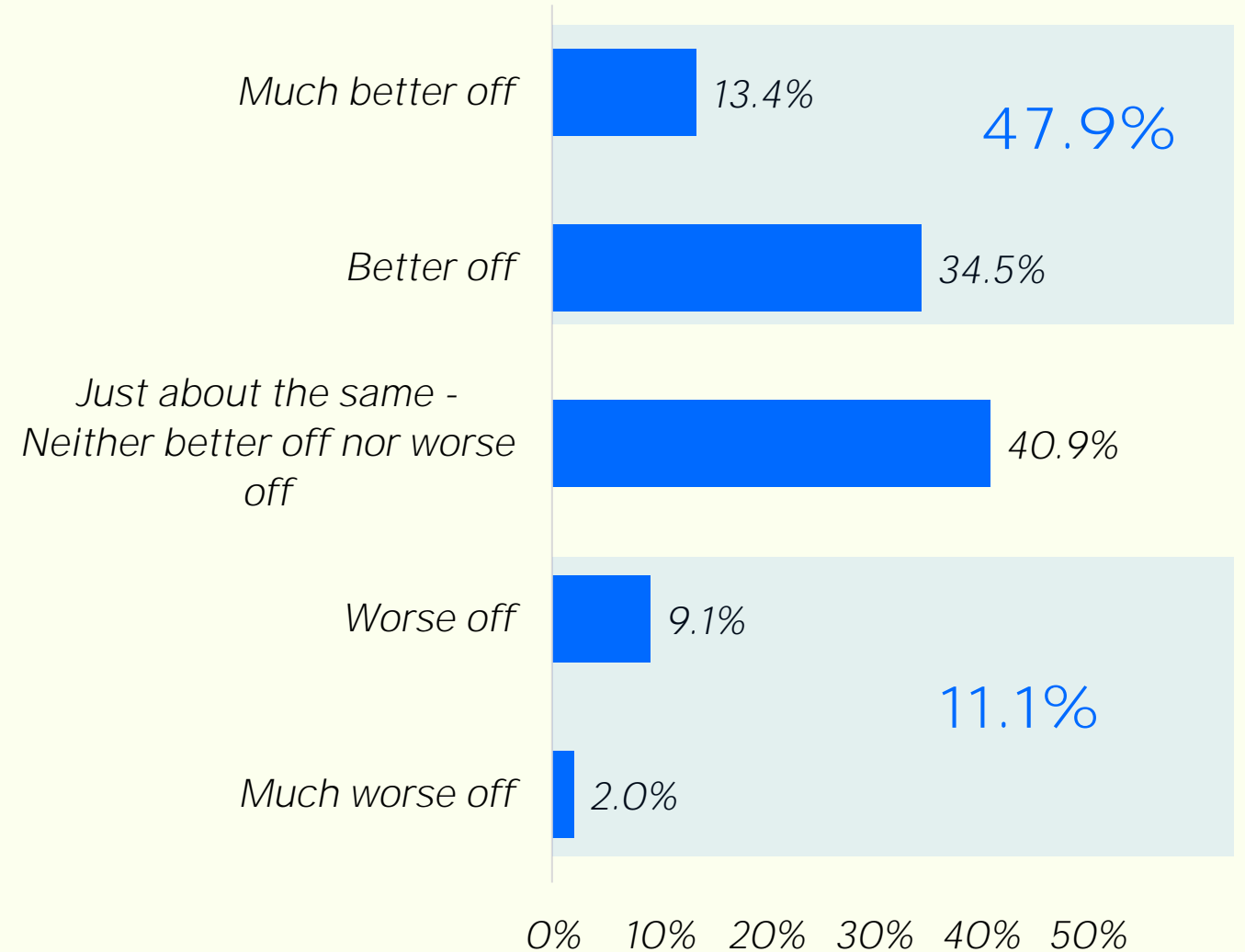




# Travelers remain largely optimistic about their personal financial outlooks.

Question:

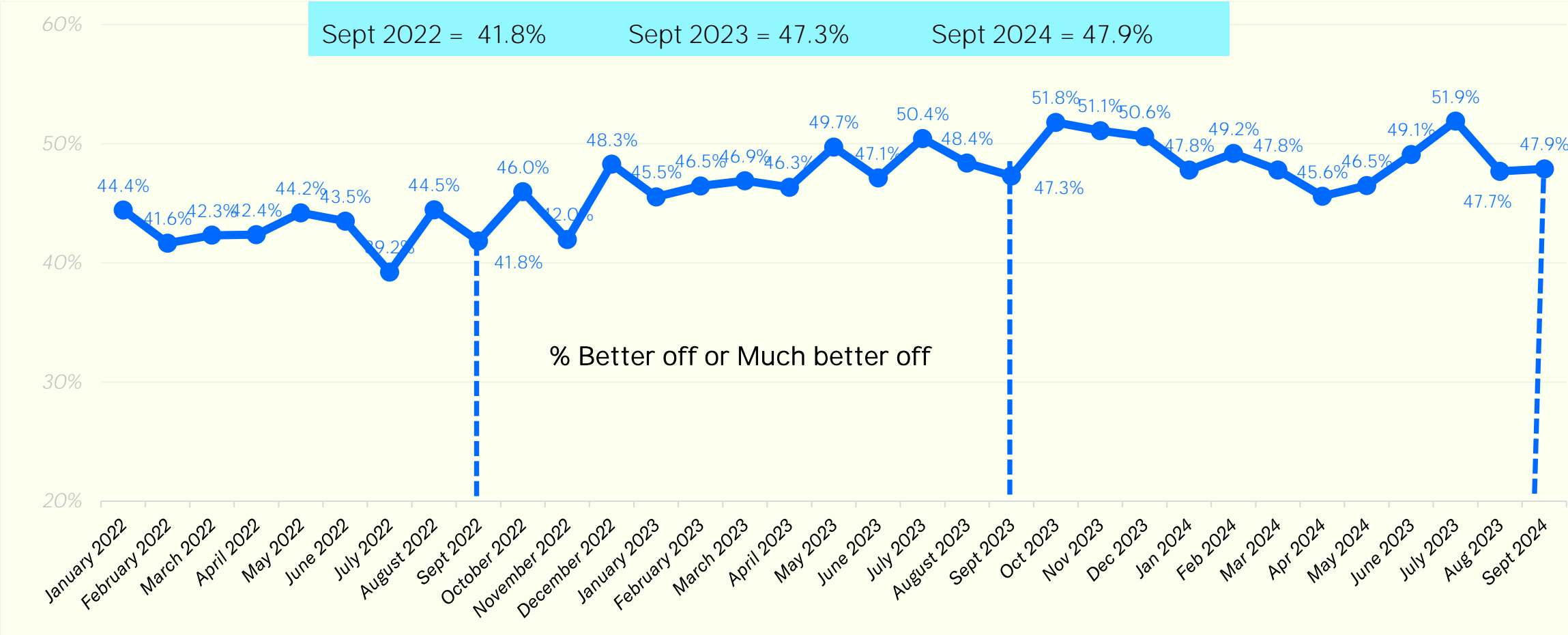
*LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?*



# ...and showed little change this month.

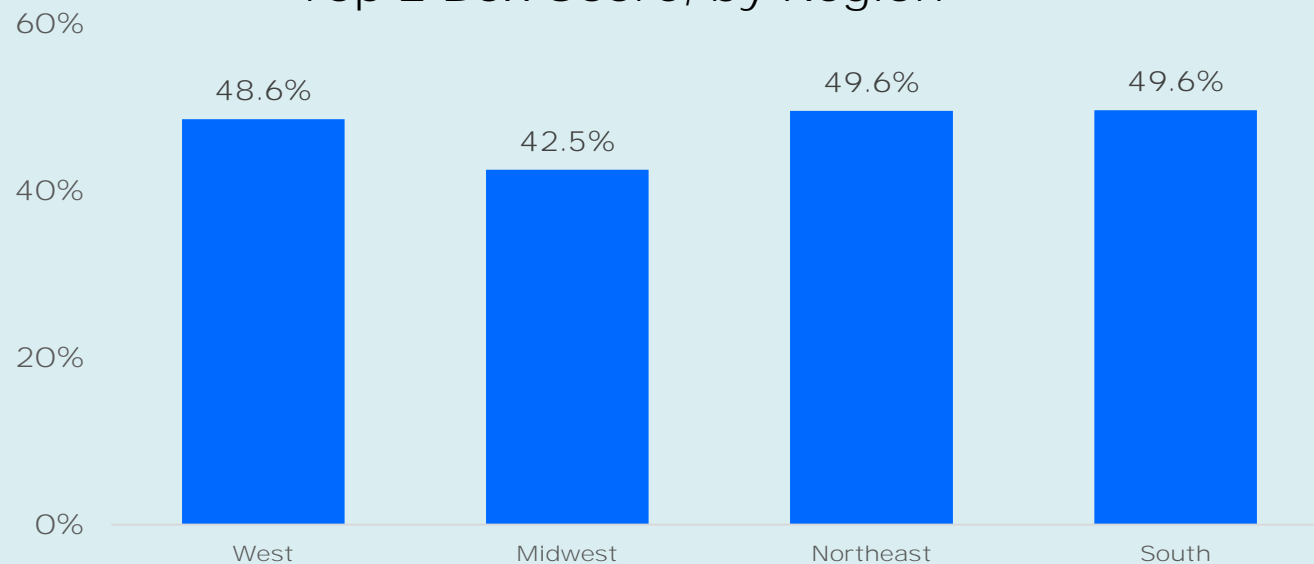
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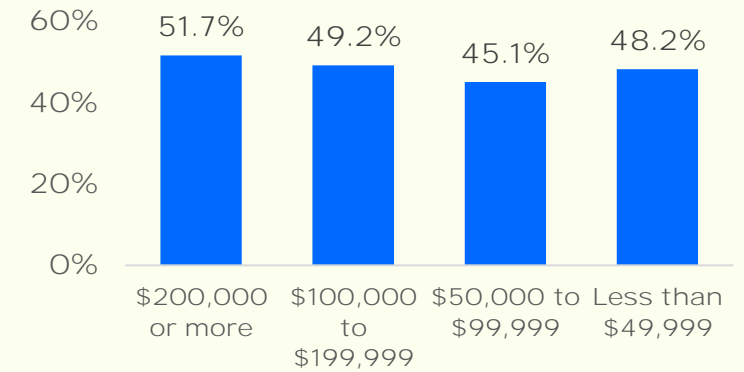
Regionally, the Midwest shows some weakness in financial outlook relative to the rest of the country.

Top 2 Box Score, by Region

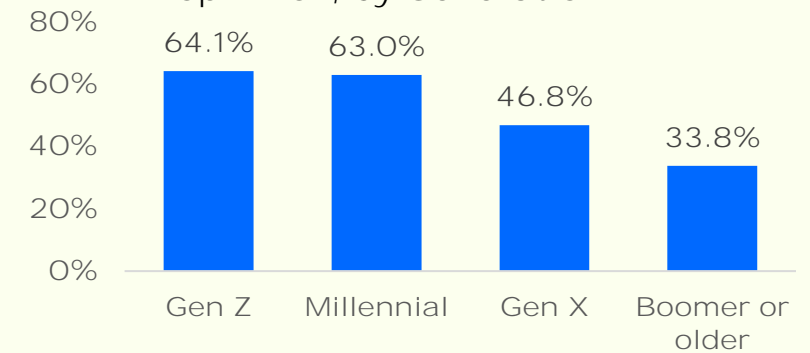


LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

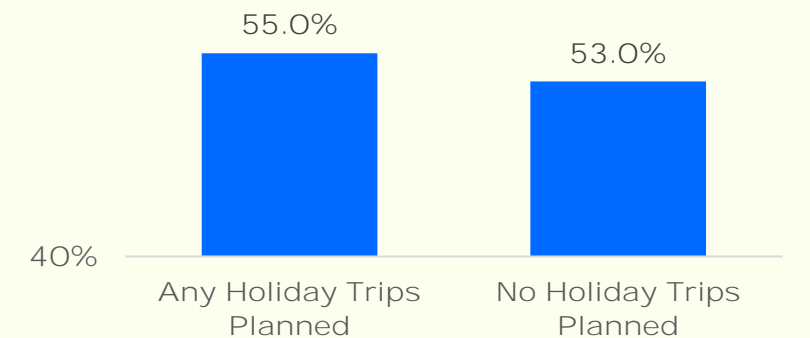
Top 2 Box, by Household Income



Top 2 Box, by Generation



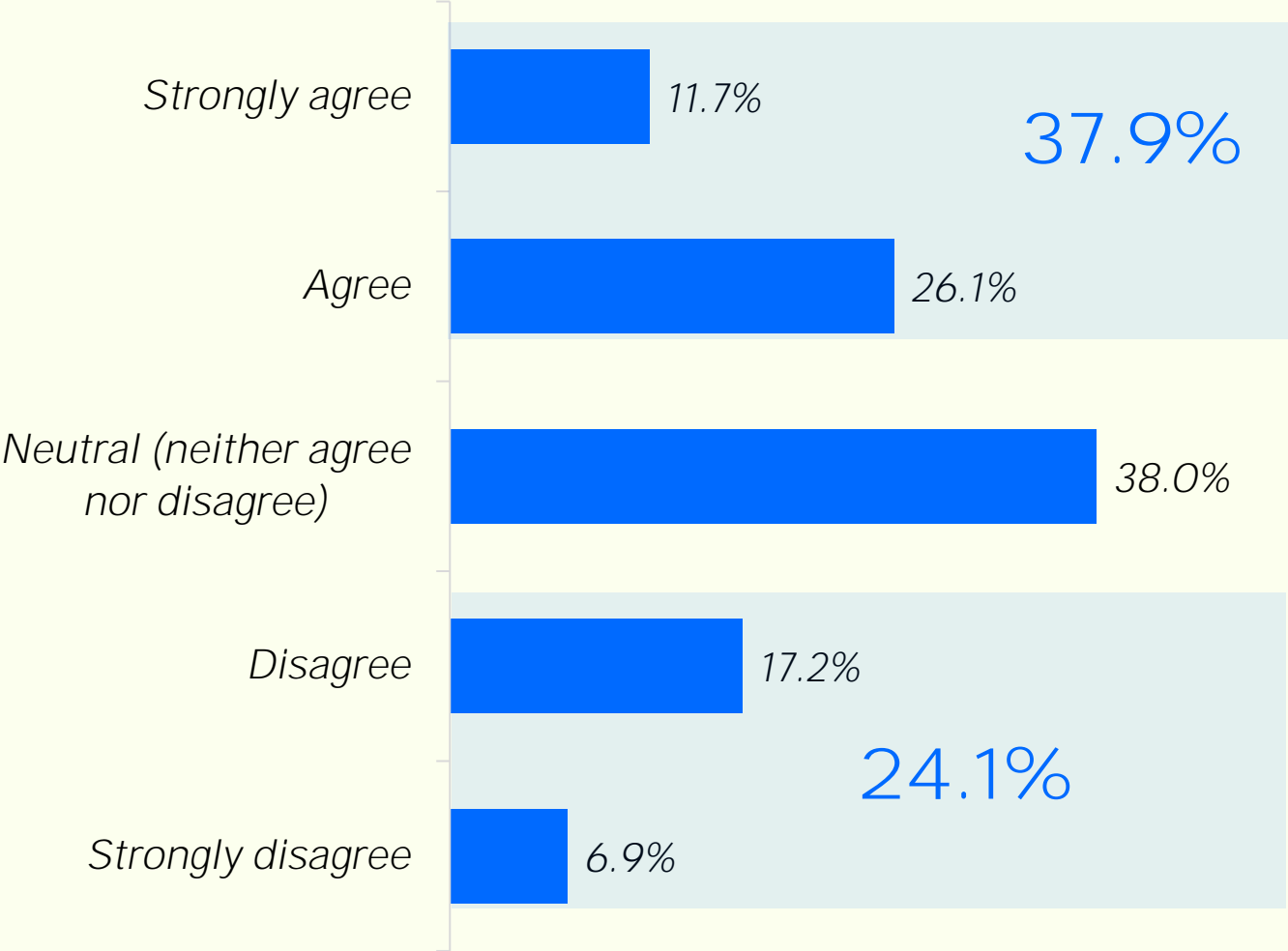
Top 2 Box, by Holiday Travel Status



# Overall, recessionary concerns improved slightly last month.

Question:

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



# Overall, recessionary concerns improved slightly last month.

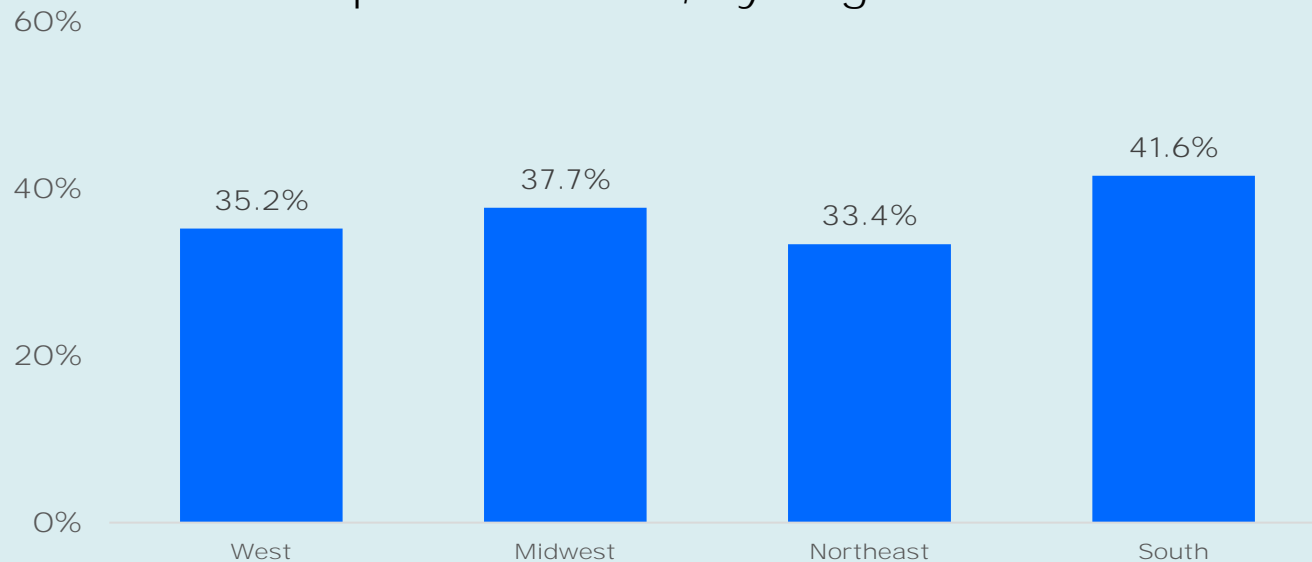
Statement:

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



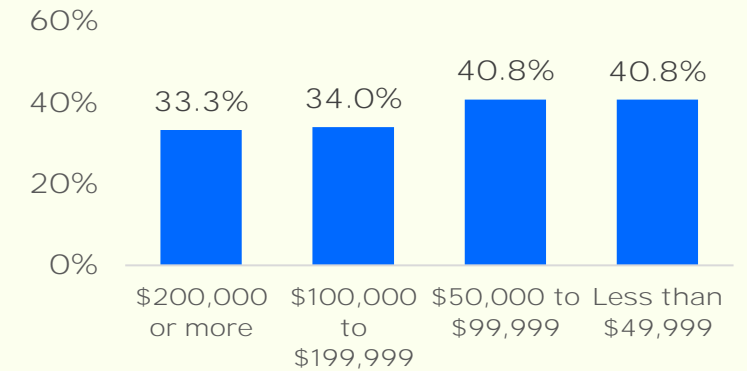
# Residents of the South and Midwest are the most likely to be say a recession is likely pending.

Top 2 Box Score, by Region

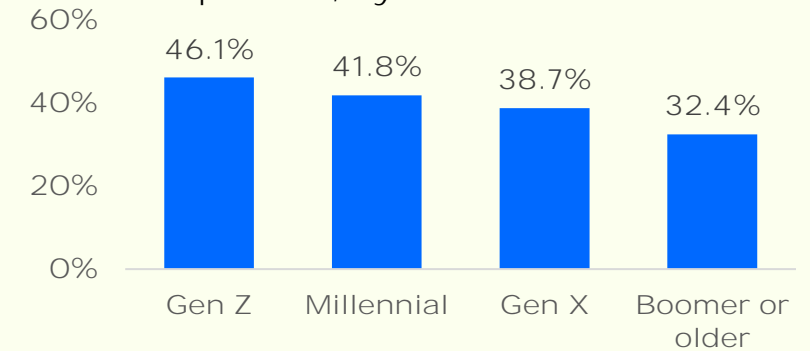


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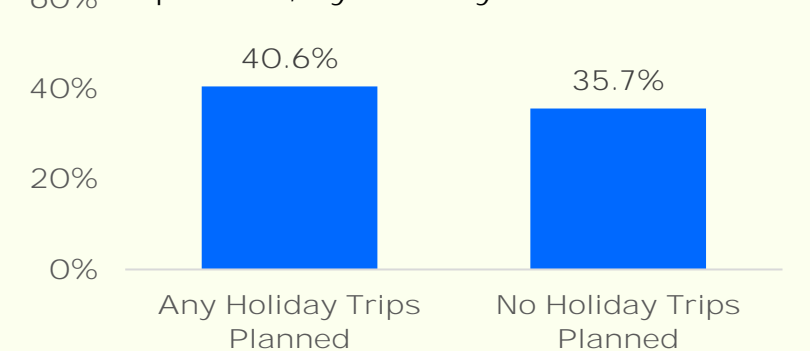
Top 2 Box, by Household Income



Top 2 Box, by Generation



Top 2 Box, by Holiday Travel Status

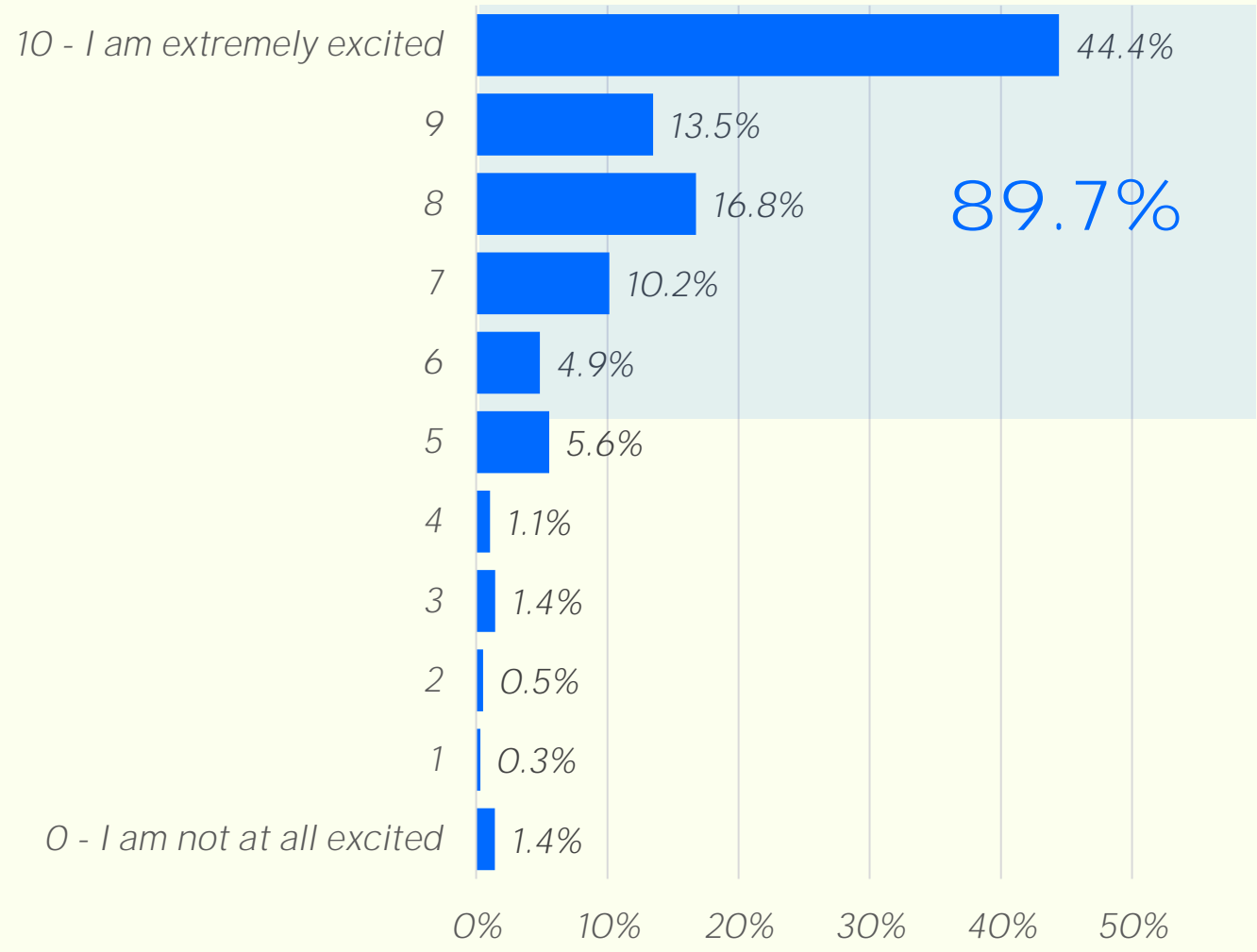




# Energized: Excitement for travel remains at record levels.

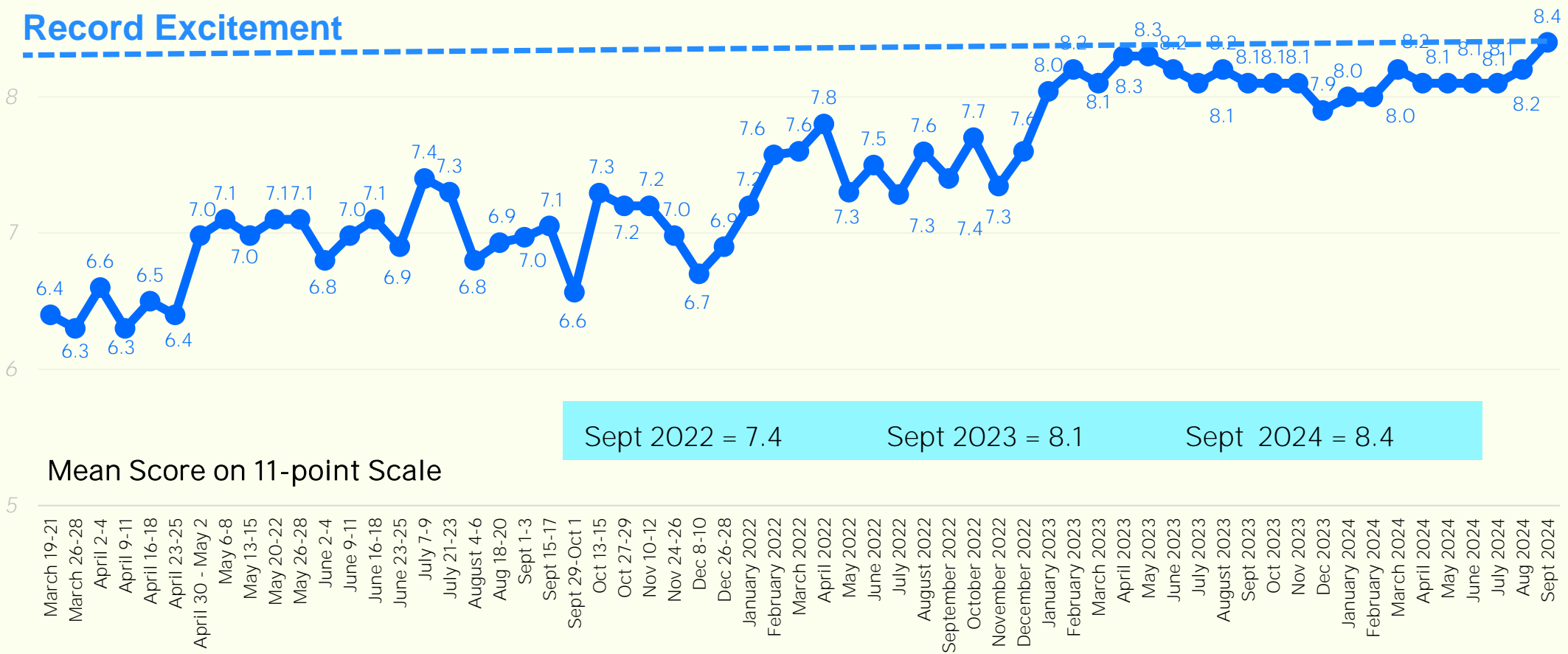
Question:

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

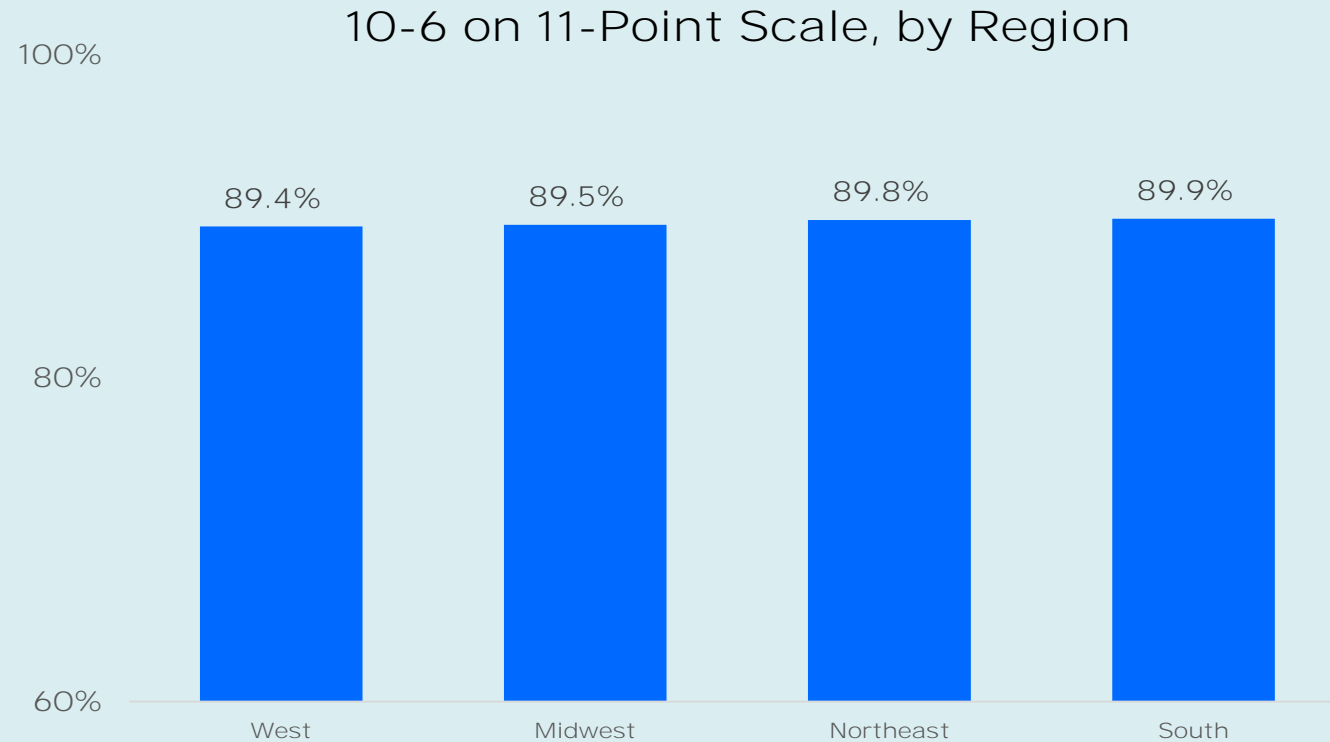


# Excitement to travel remains at record levels.

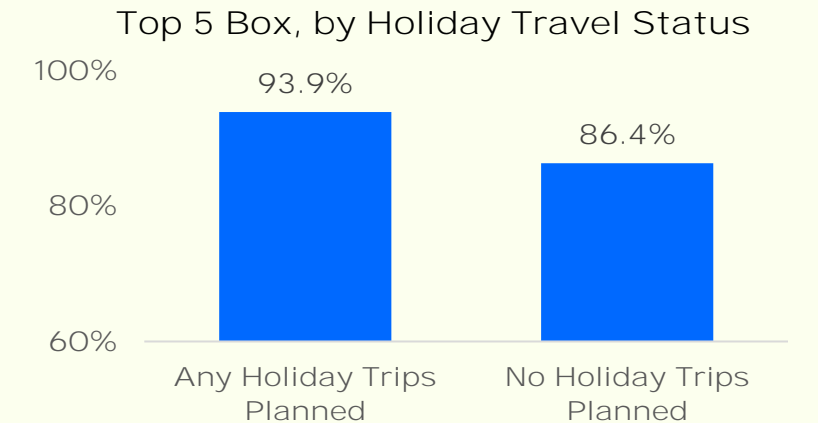
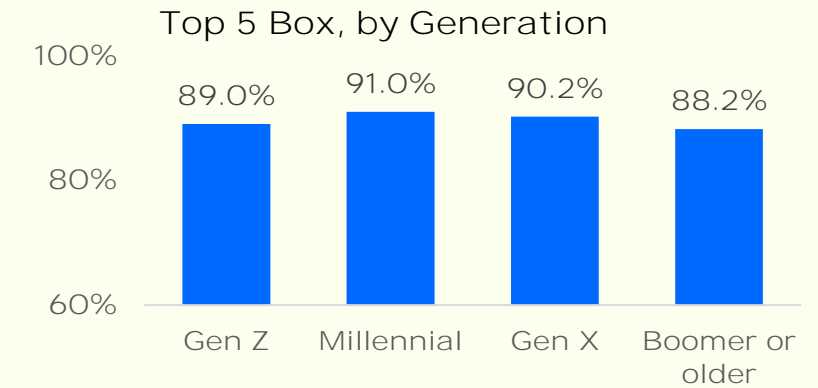
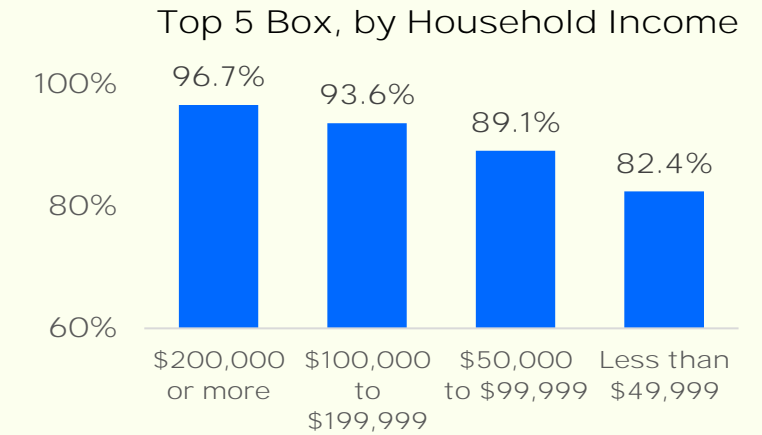
Question:  
*Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?*



# Excitement to travel for leisure is high across the regions.



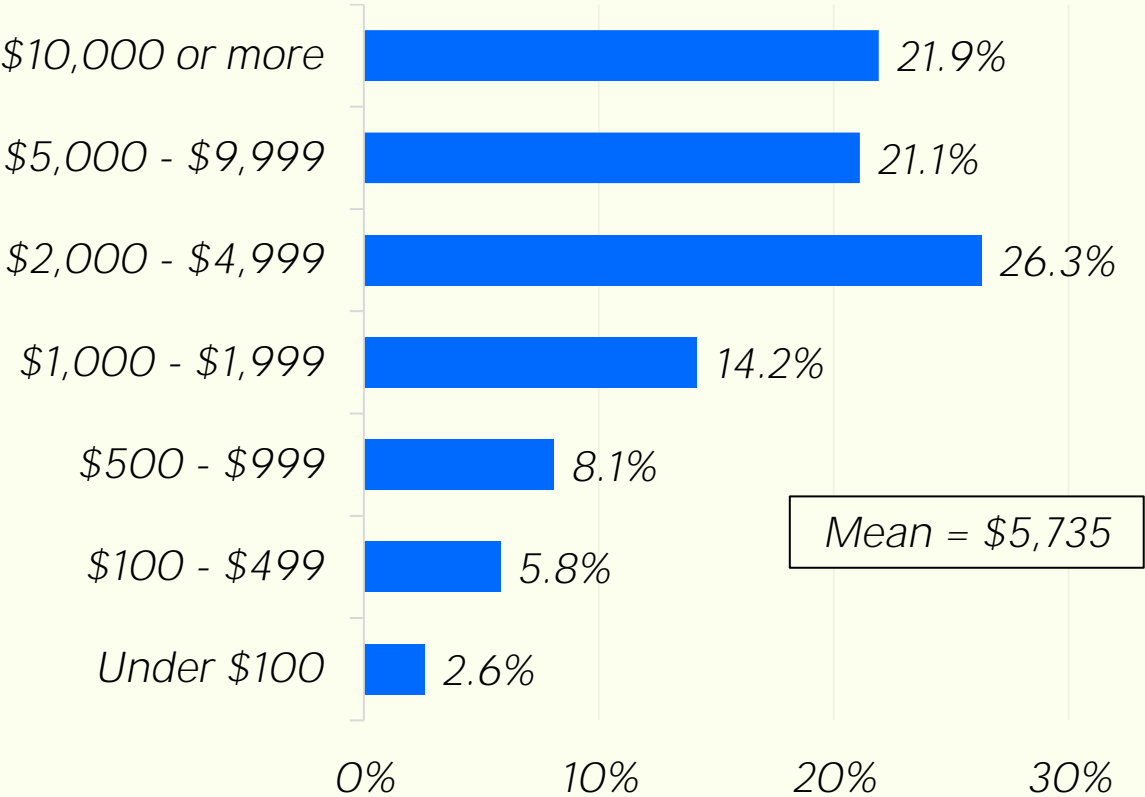
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Expected travel budgets soared again this month.

Question:

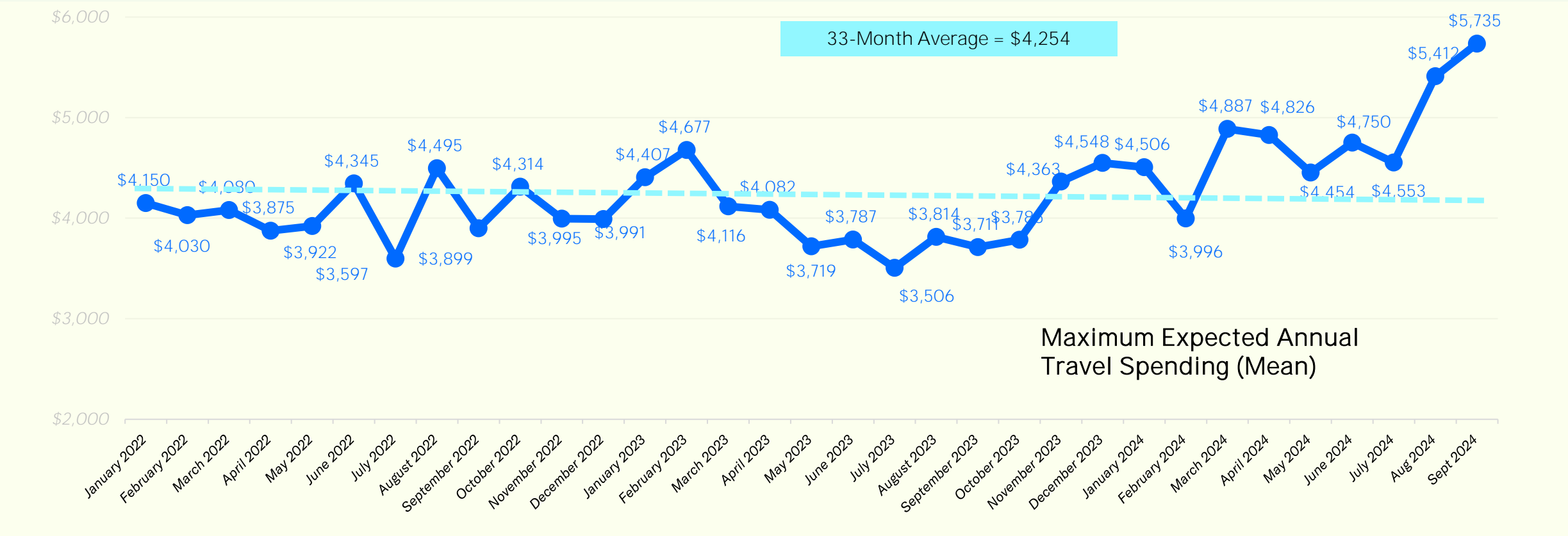
*How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?*



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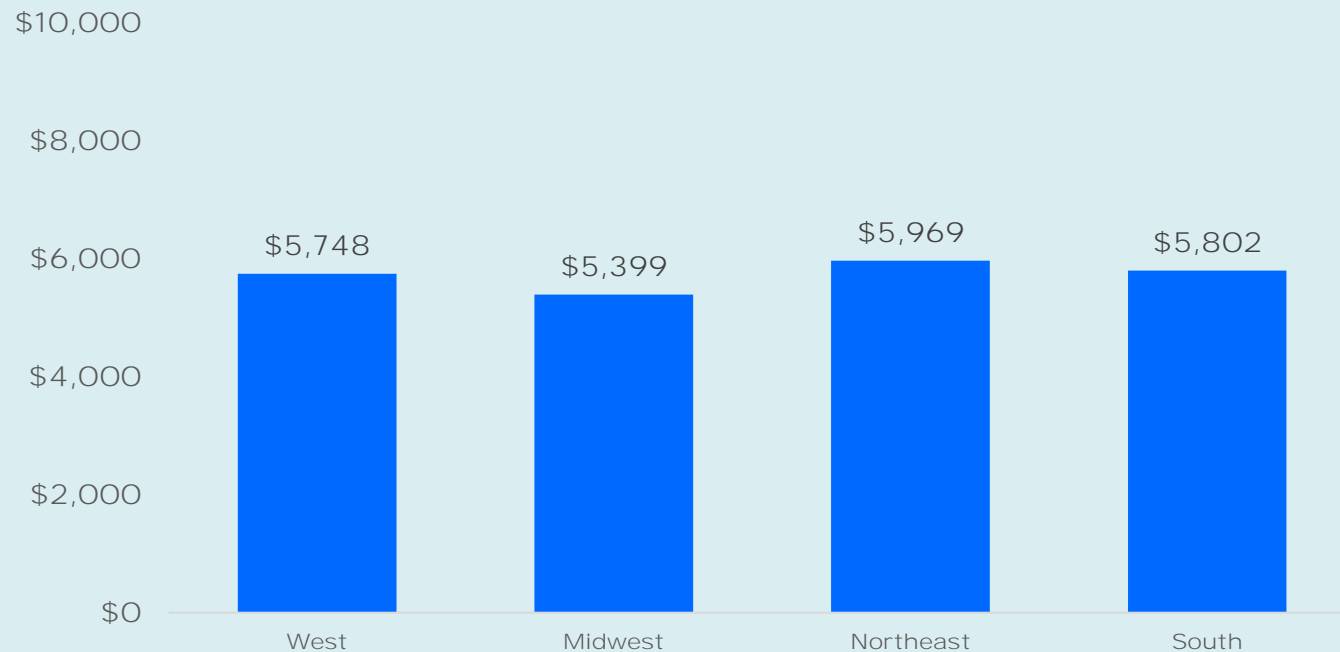
## Question:

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):



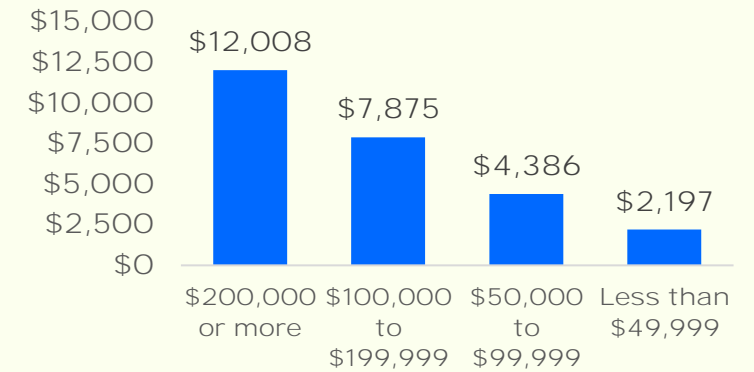
# Expected travel budgets are highest in the Northeast.

## Maximum Expected Annual Travel Spend

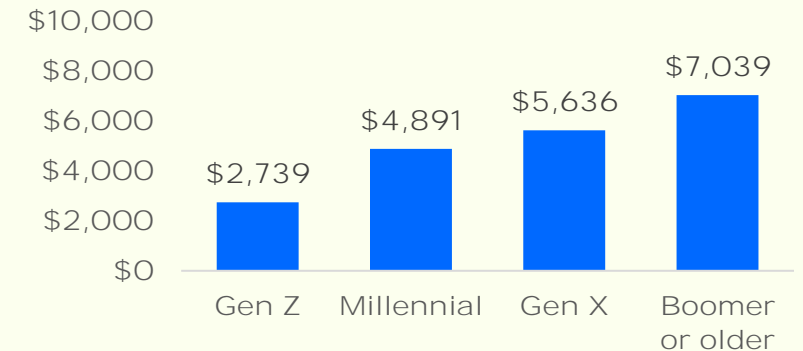


Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):

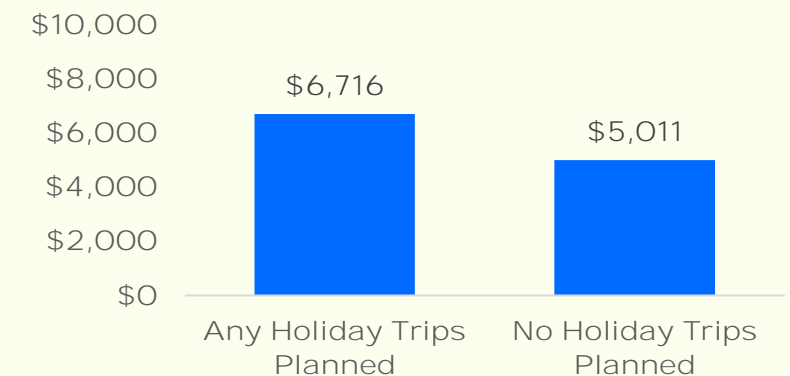
## Average Budget, by Household Income



## Average Budget, by Generation



## Average Budget, by Holiday Travel Status



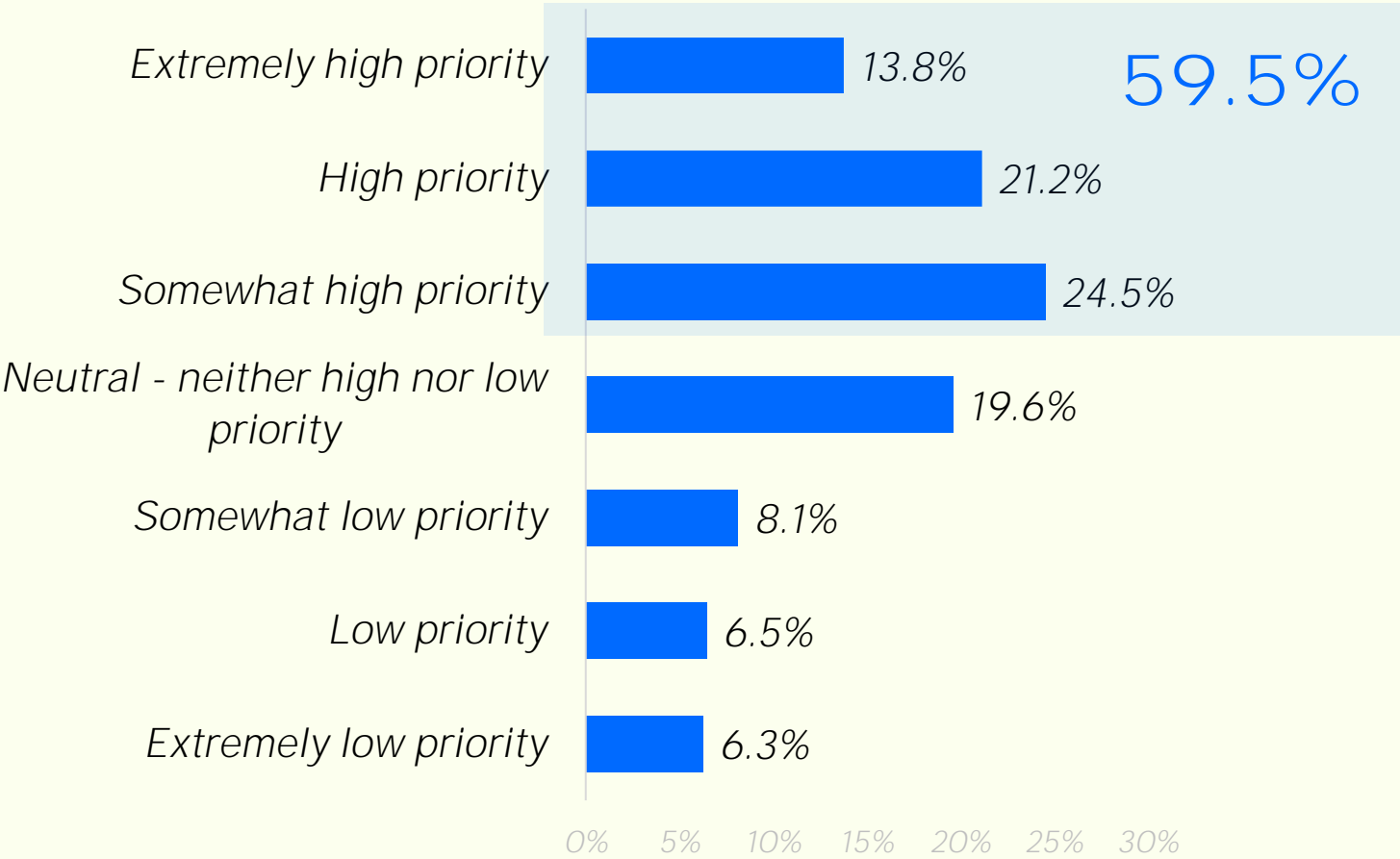


# Most intend to make leisure travel a spending priority in the next three months.

## Question:

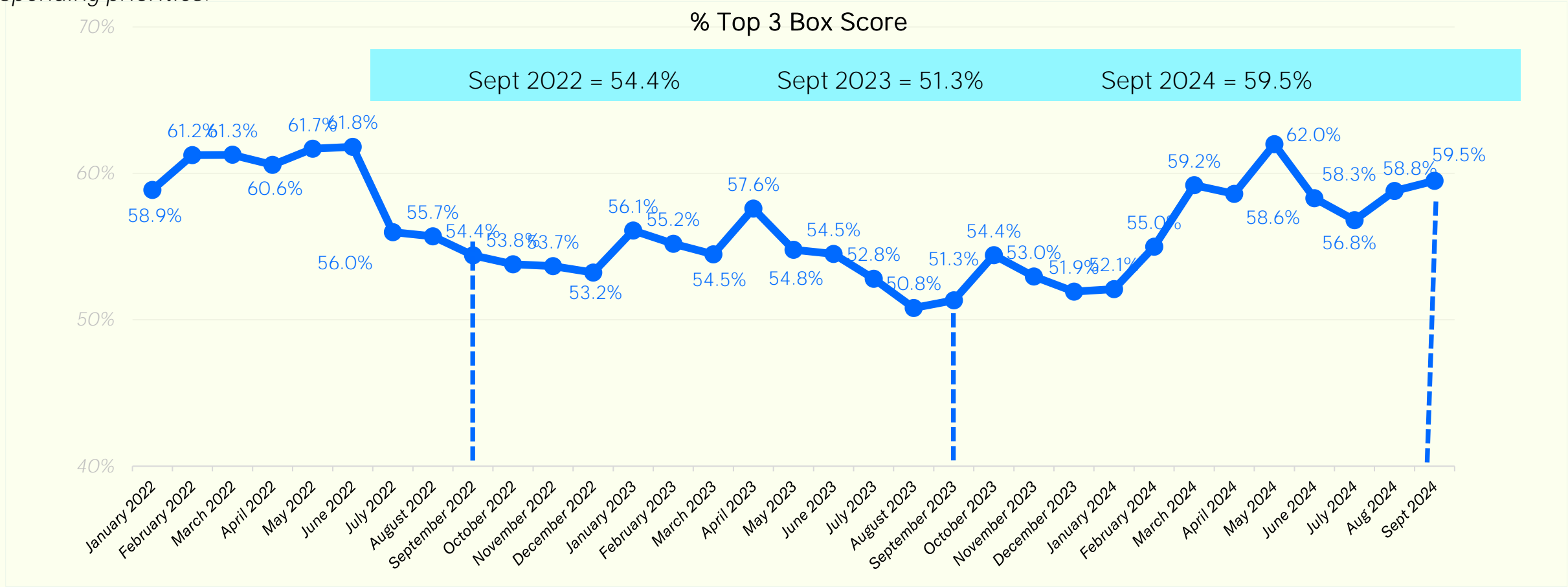
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

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

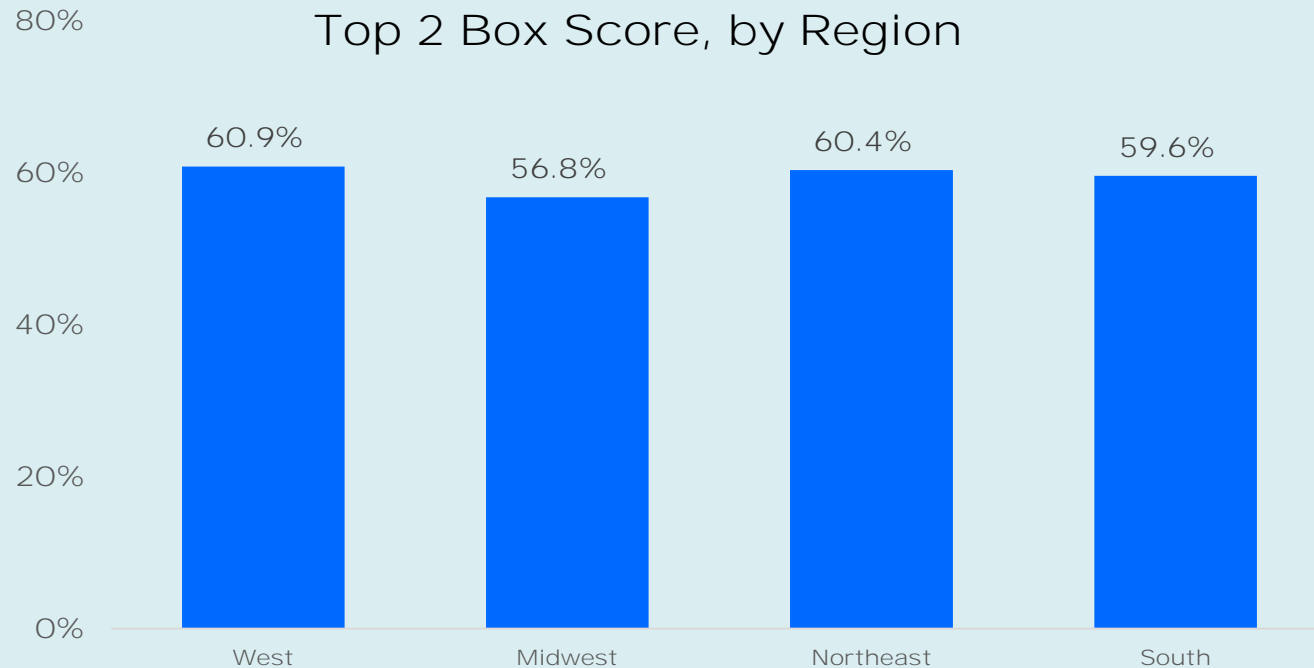


# ...the metric has grown for the past two months, and appears solid.

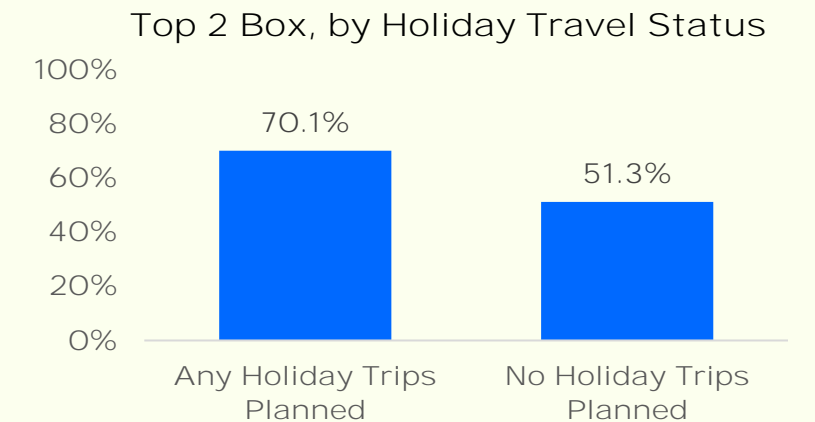
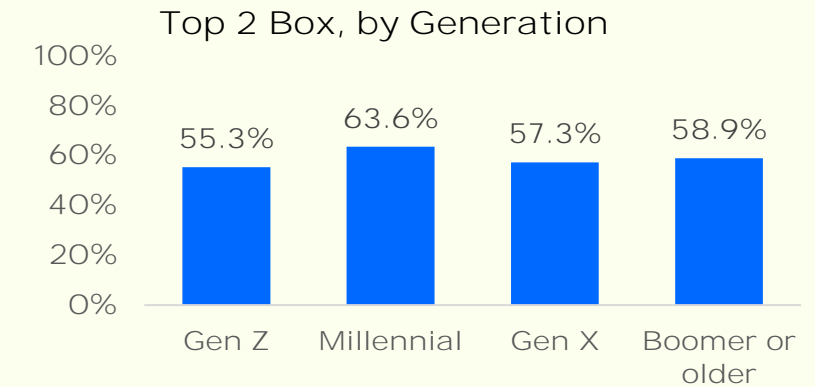
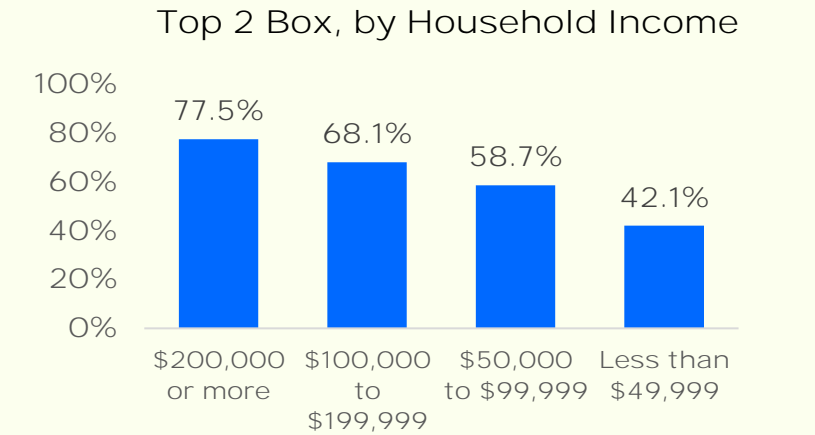
Question:  
*Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.*



# Regionally, the Midwest is slightly trailing the rest of the nation.



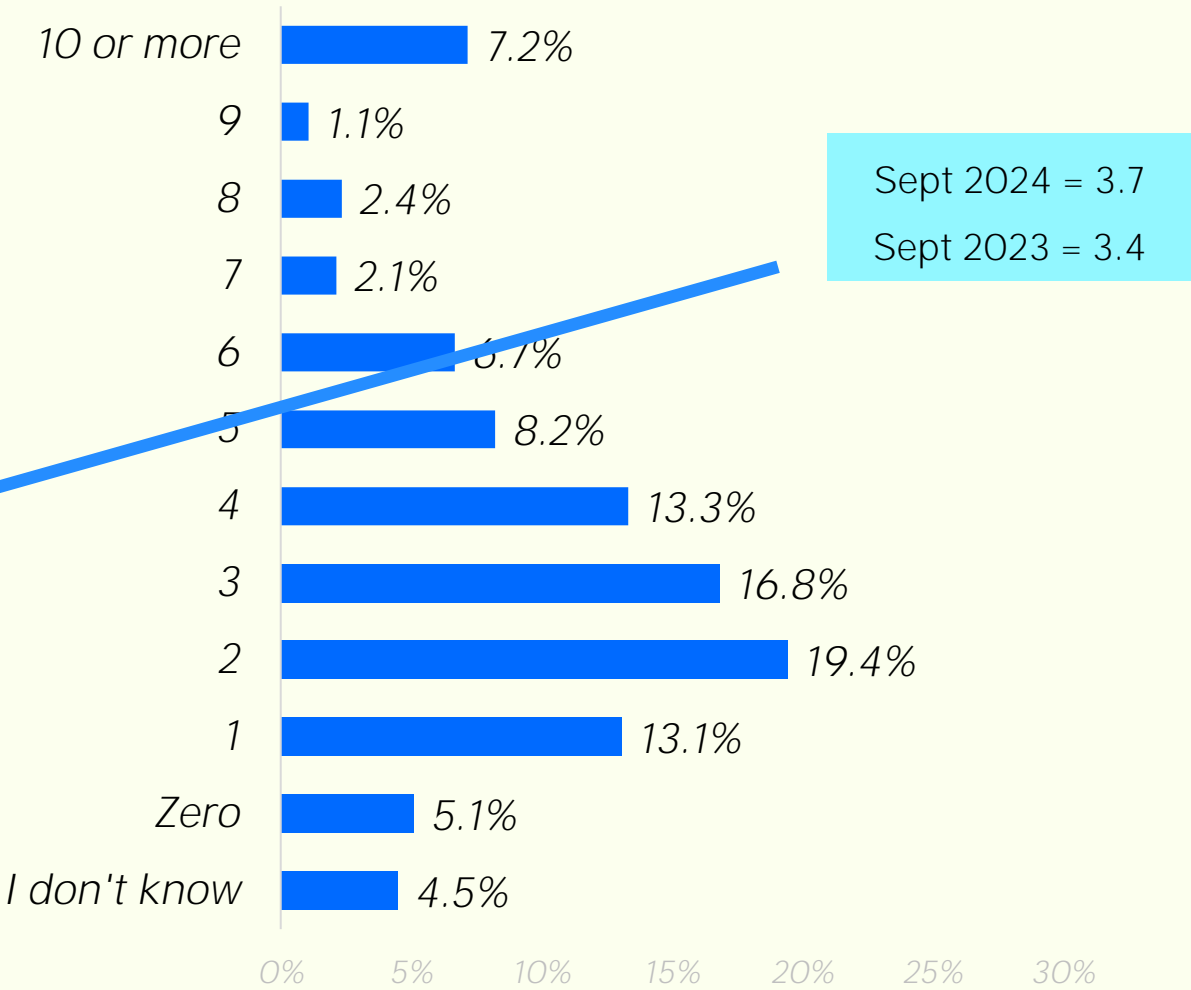
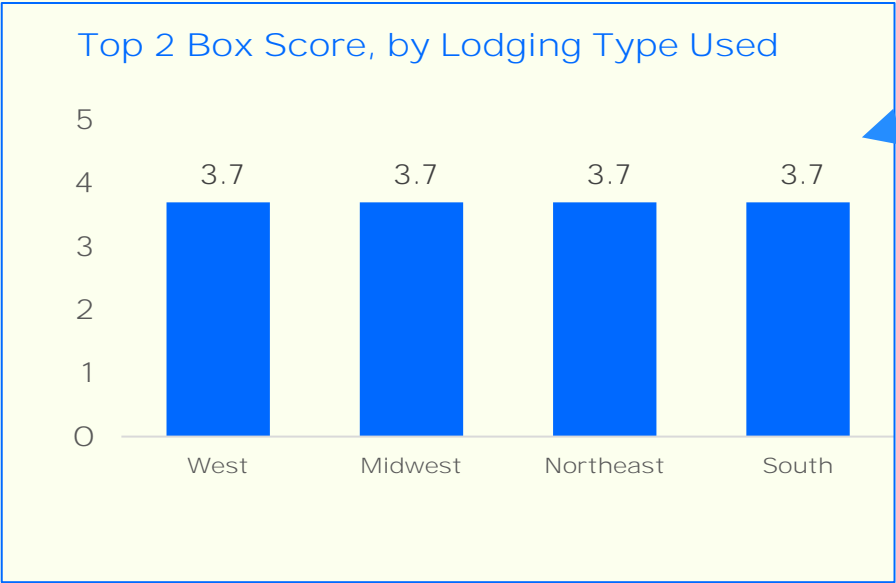
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



# Expected travel was steady across regions in this month.

Question:

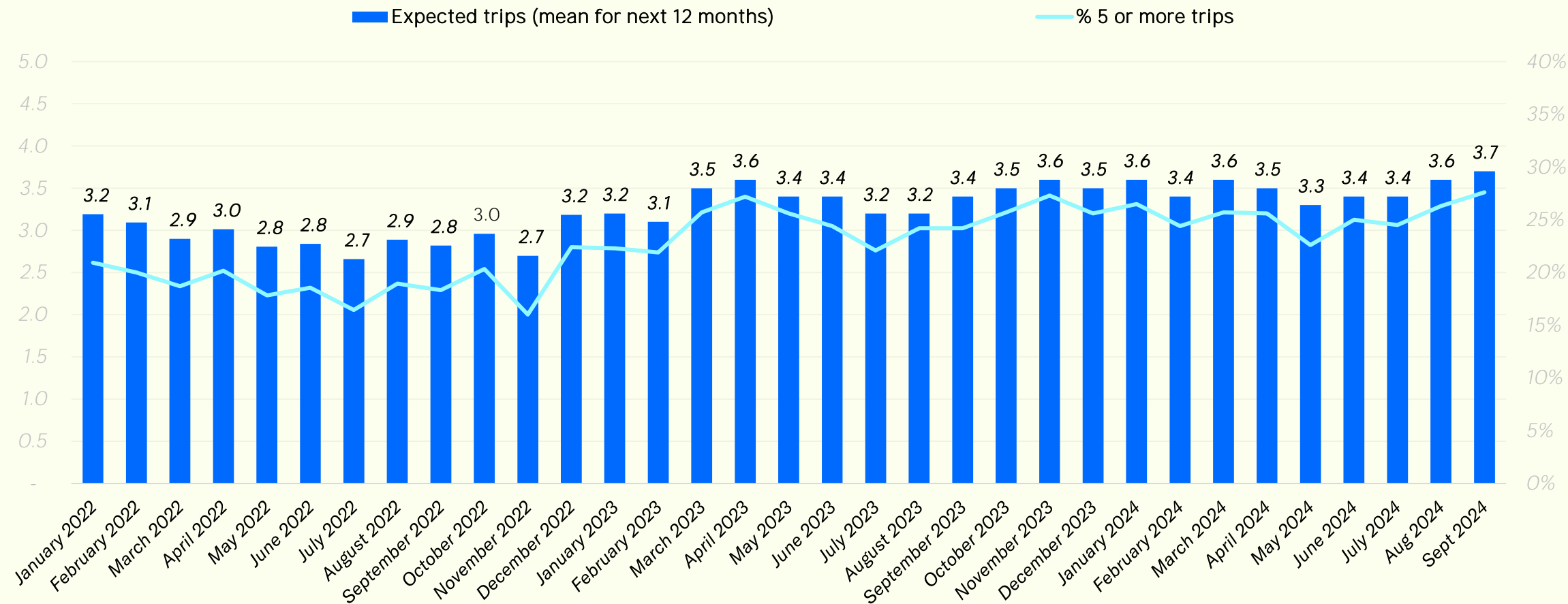
*IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?*



# Travel expectations are also at record high levels.

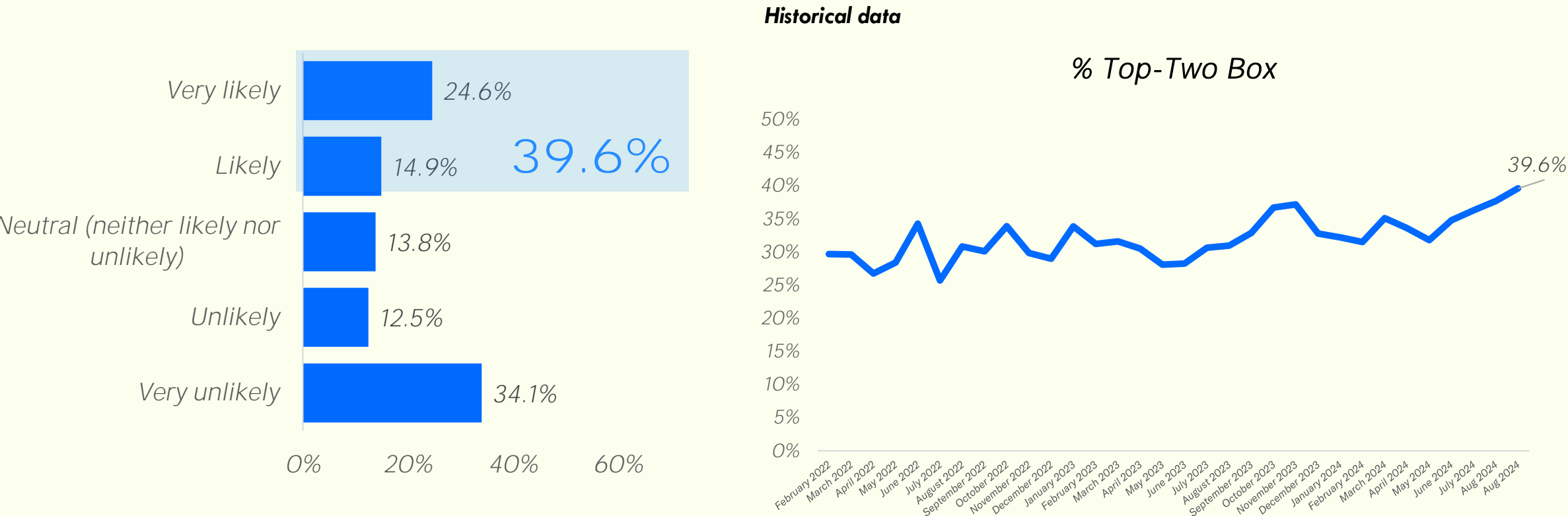
Question:

*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 moved forward again this month.

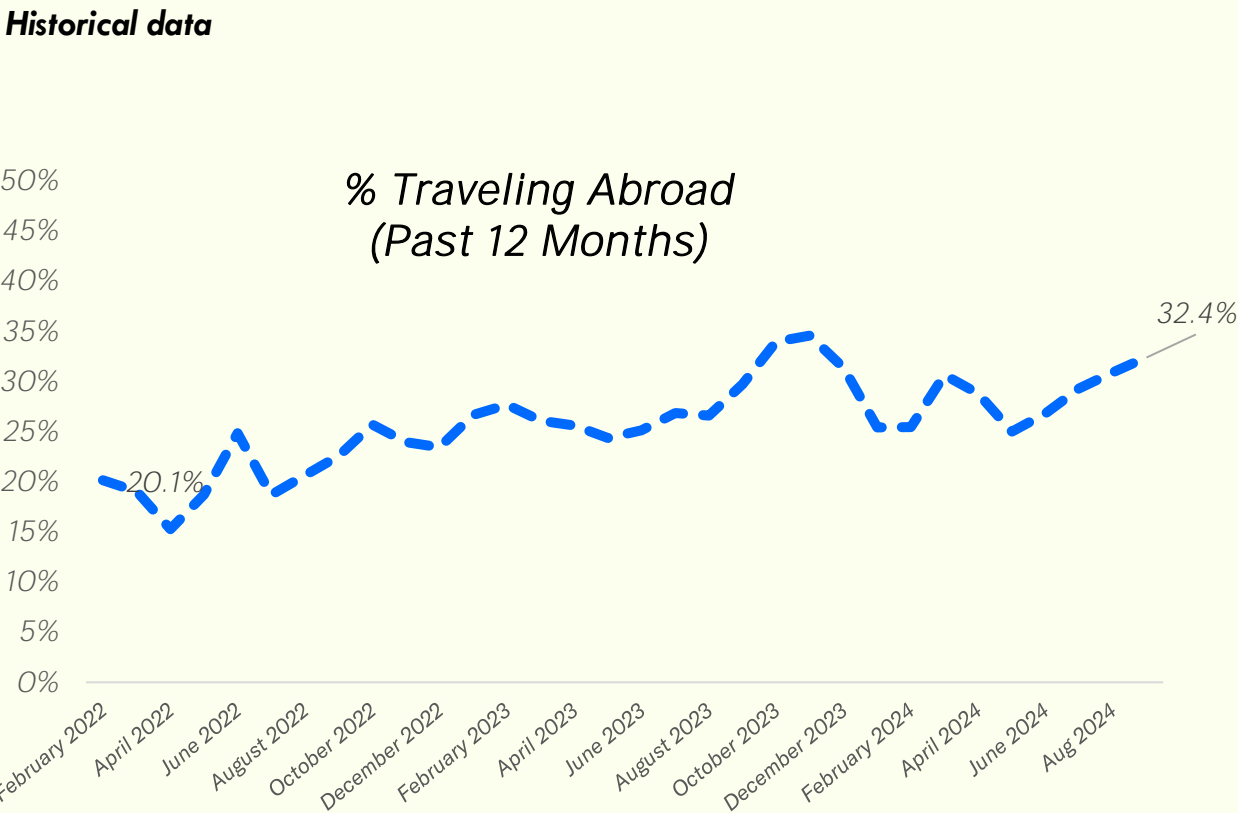
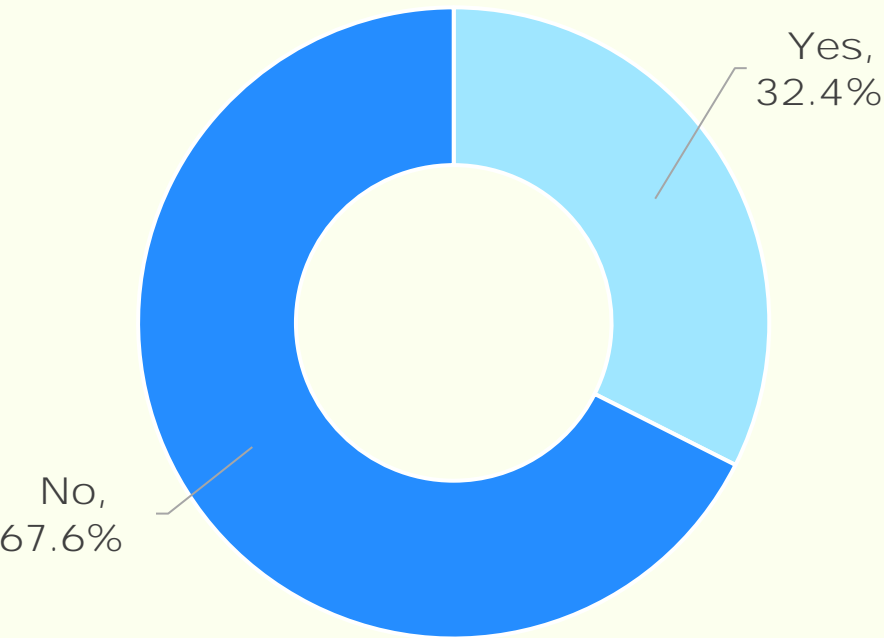
Question: *How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?*



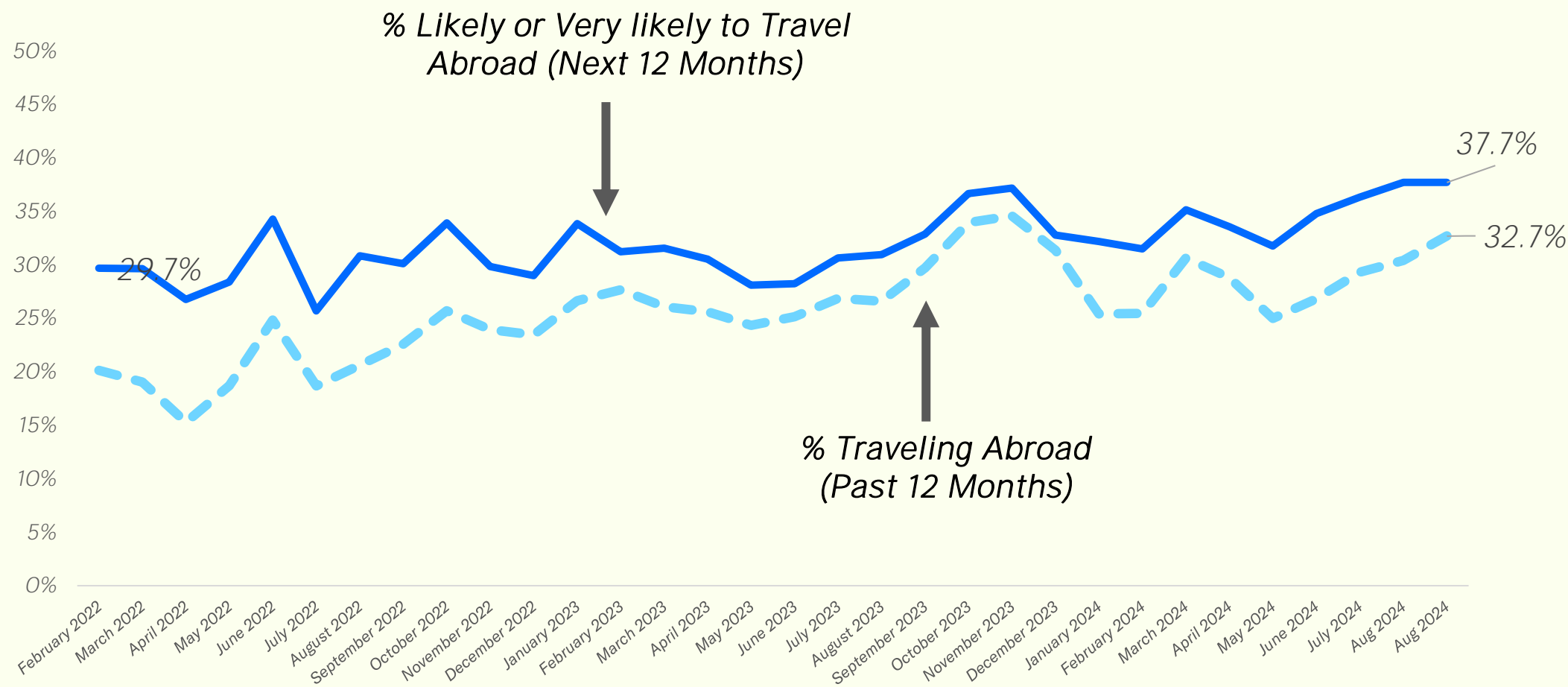


# International travel reported by Americans also rose again last month.

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

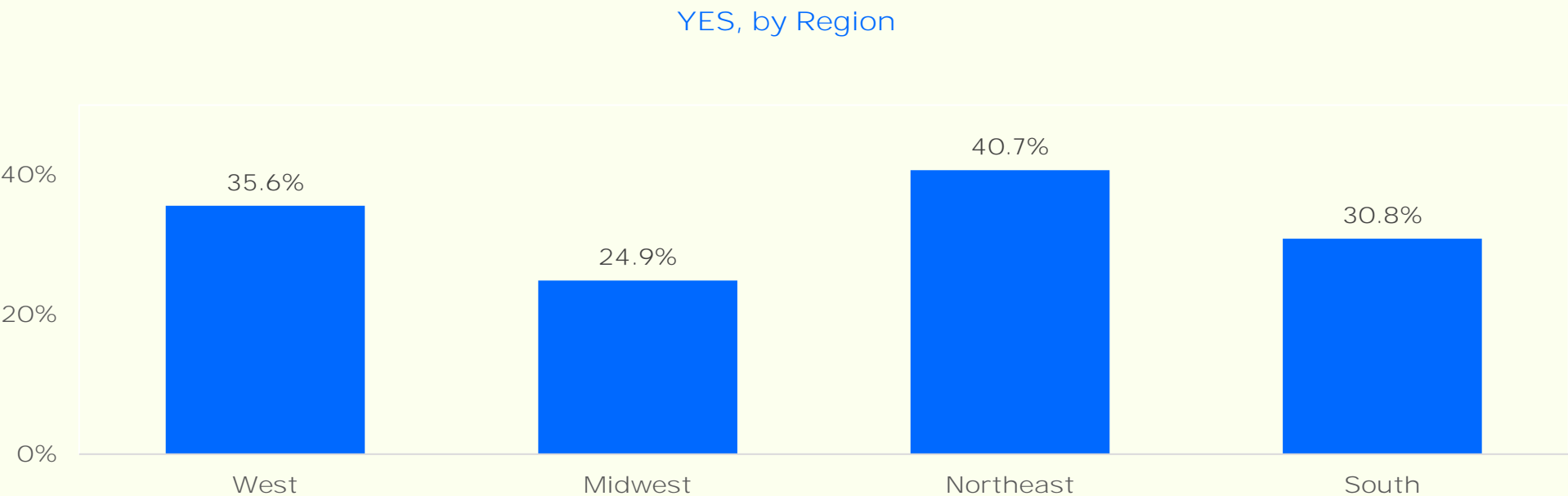


# Likelihood to travel abroad and actual international travel move closely together.



# Travelers living in the Northeast show the highest propensity to travel abroad.

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



# Sentiment Indices



**Future Partners**

# 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.

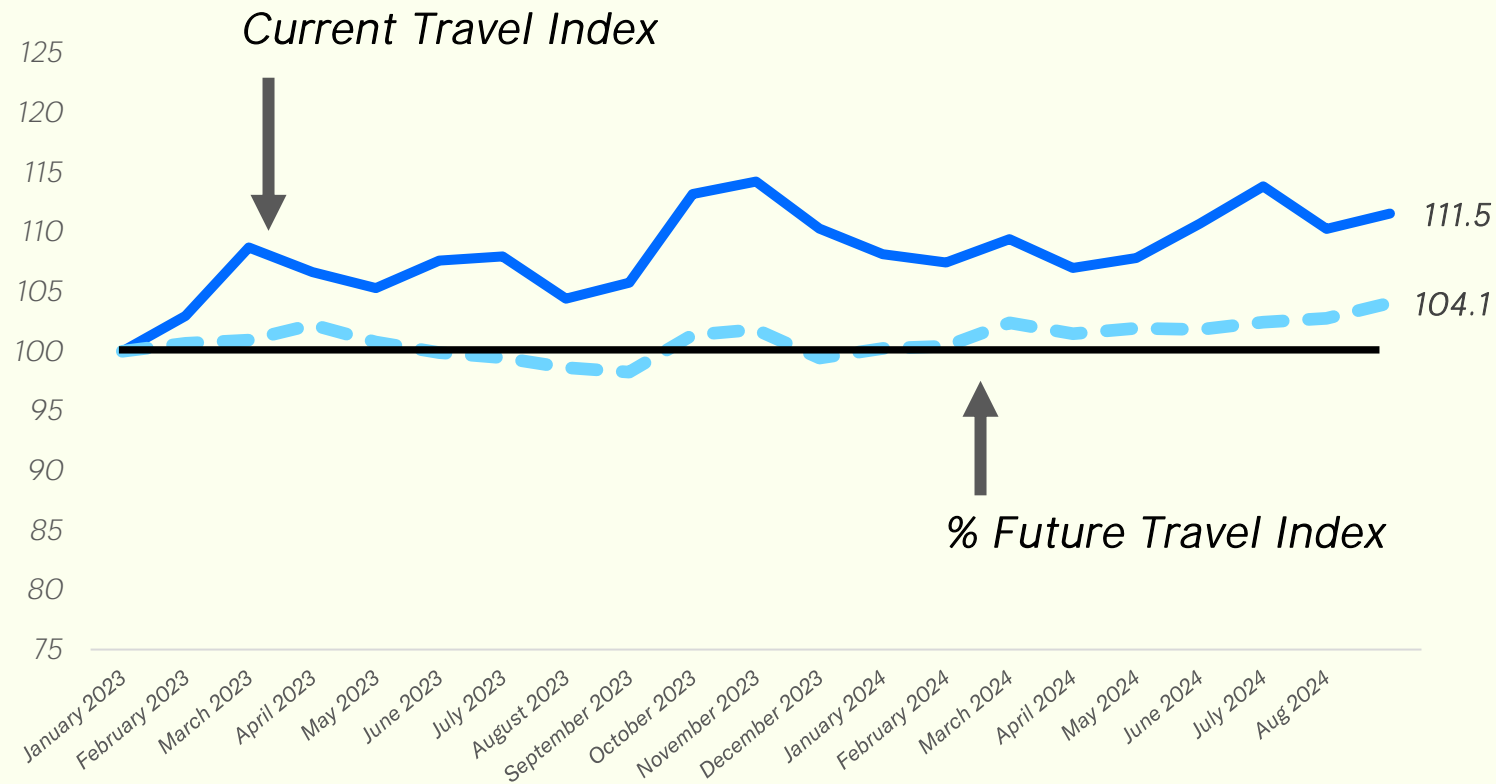
## Current Travel Sentiment Index

- 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)

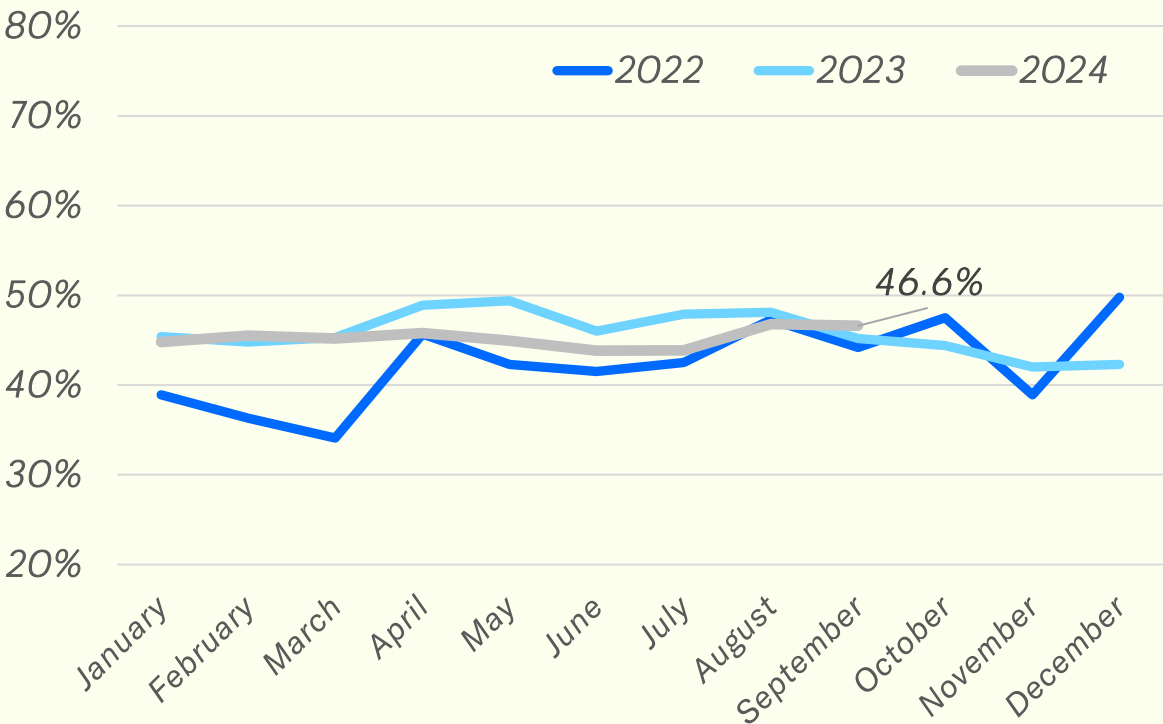
# Likelihood to travel abroad and actual international travel move closely together.





# For many Americans, travel fantasies are part of daily life

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

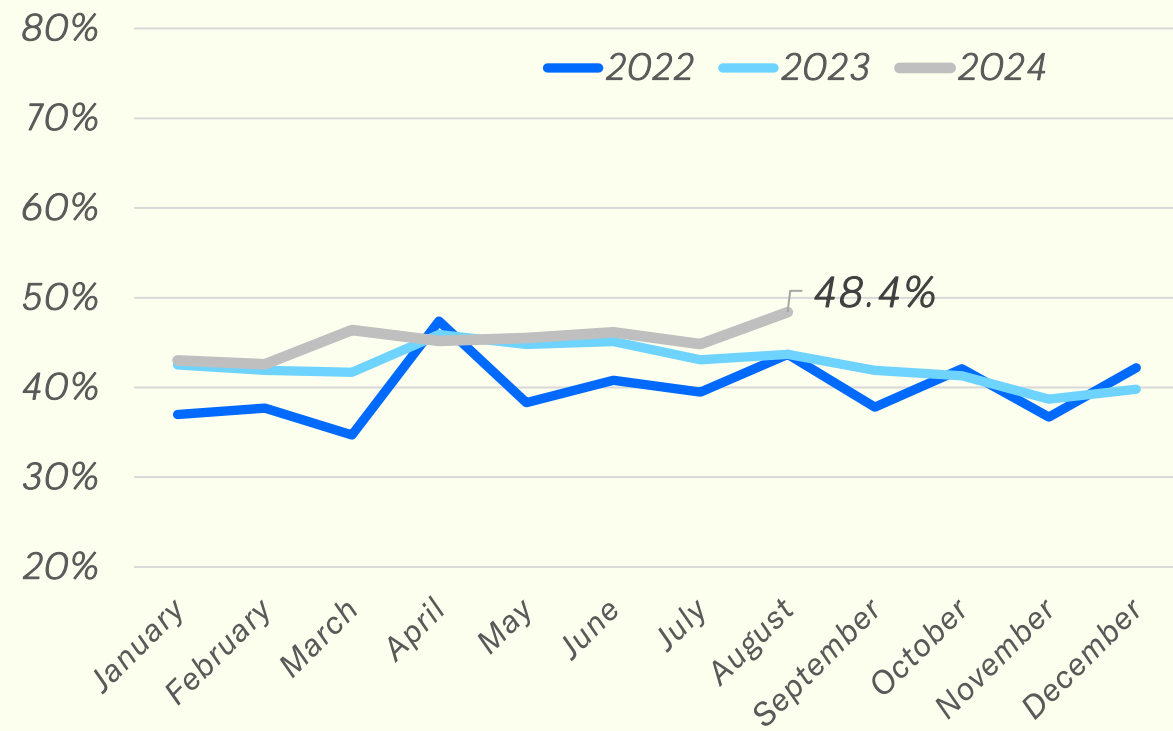






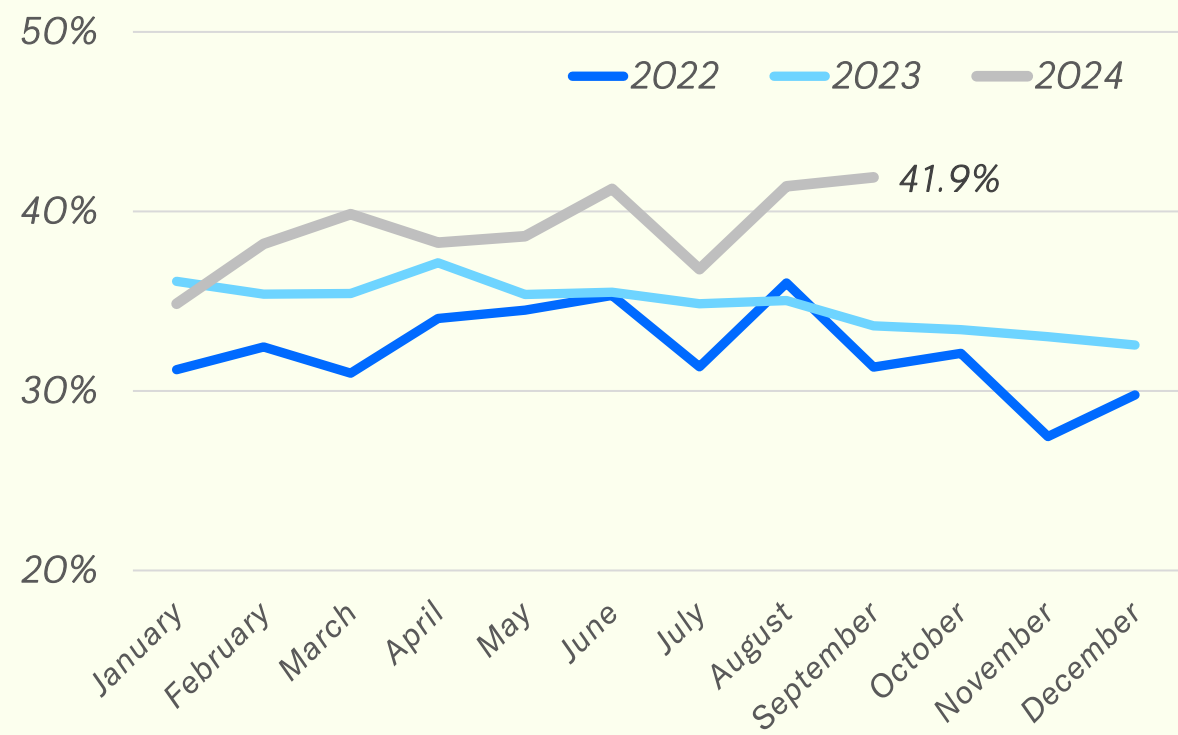
# The fun before the journey: Talking about trips with friends.

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



# Online research is booming right now.

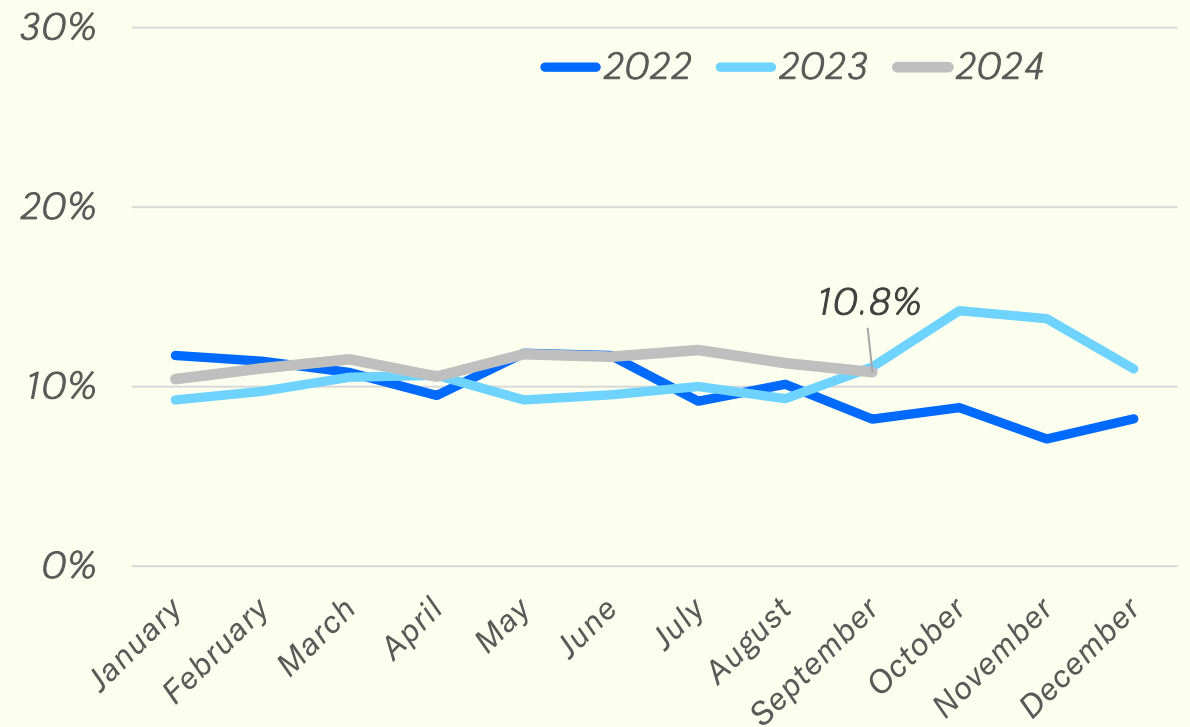
Researched about travel online in the past week  
(% of all American Travelers)





# Over 1-in-10 researched travel ideas offline

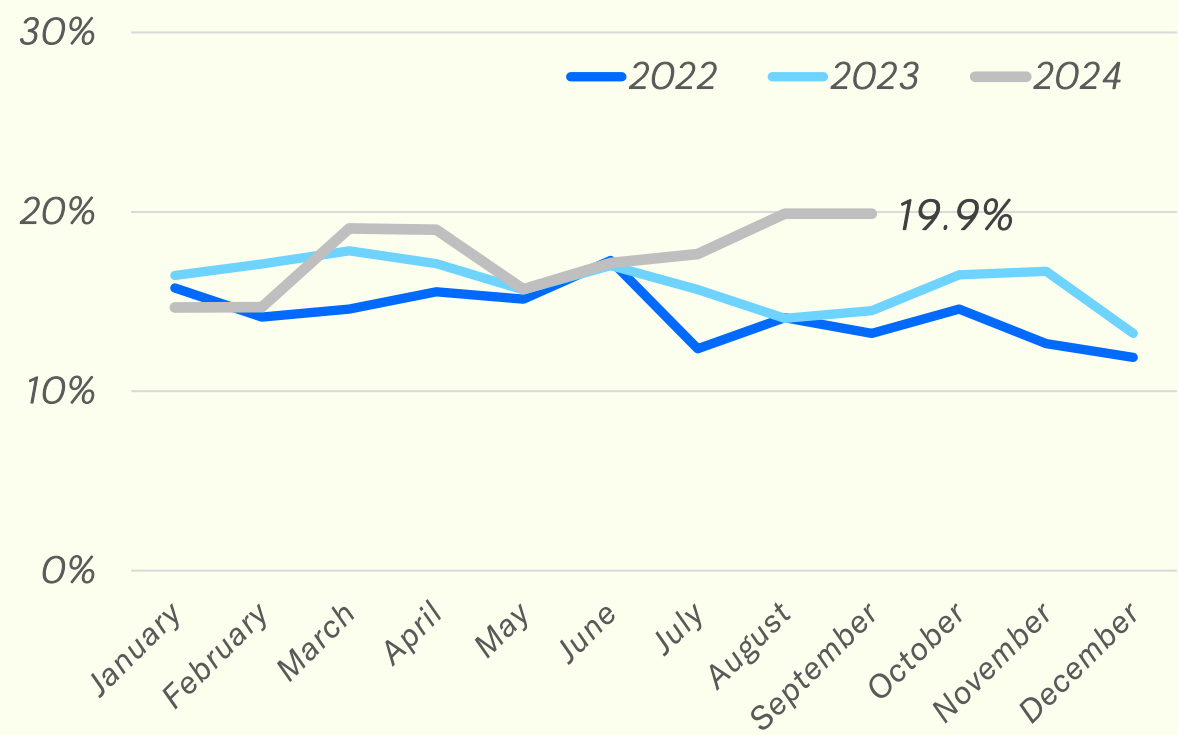
Researched offline in the past week  
(% of all American Travelers)





# Booking is up significantly from this time last year

Made travel reservations in the past week  
(% of all American Travelers)



# Current travel outlook is solid as we move into the holiday season.

- Travel budgets are up
- Excitement to travel is at record levels
- The expected number of future trips is up
- Travel booking activity is high



# Business & Group Meeting Travel

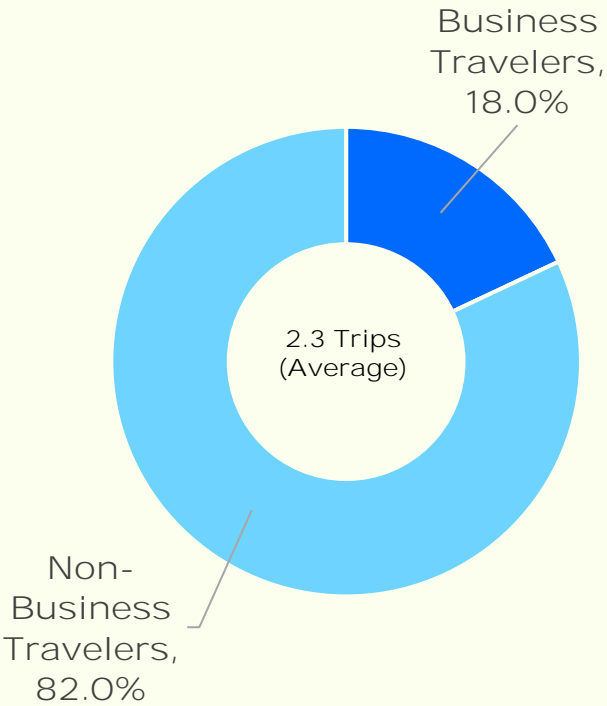
**Future Partners**



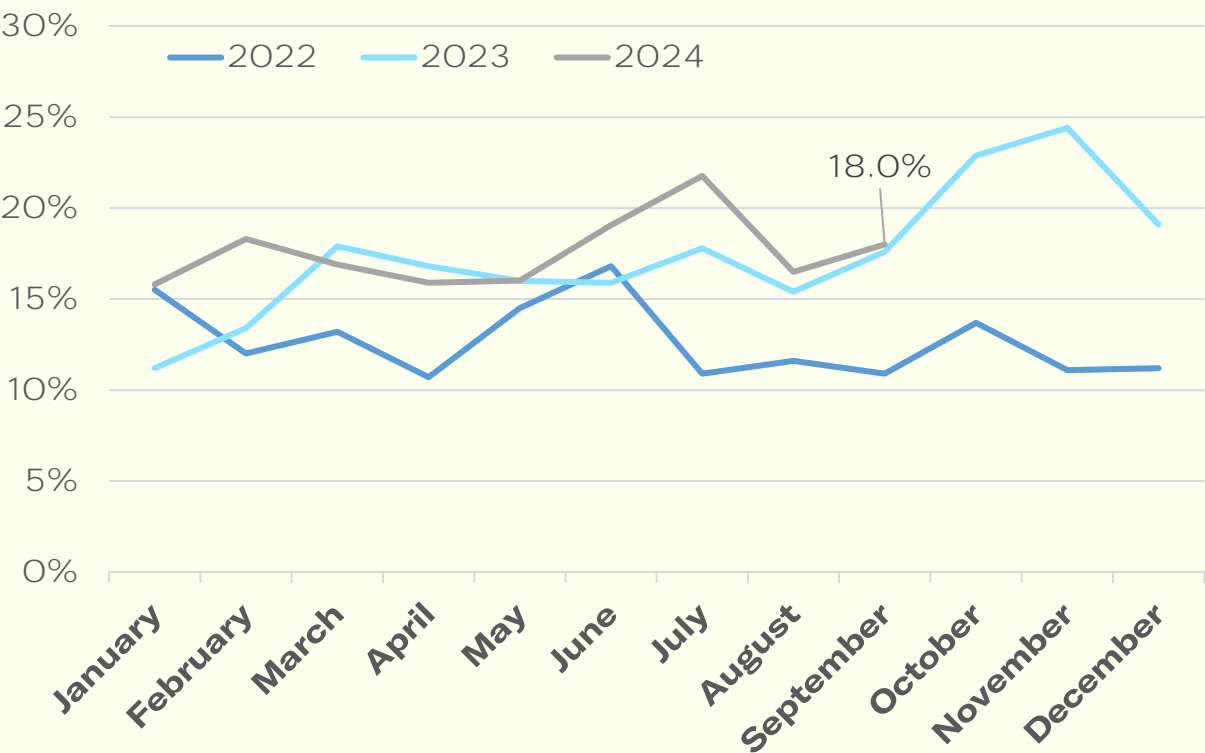
# Overnight business travel grew last year and the proportion of travelers taking such trips is solid.

*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



Percent of All Travelers Taking Business Trips

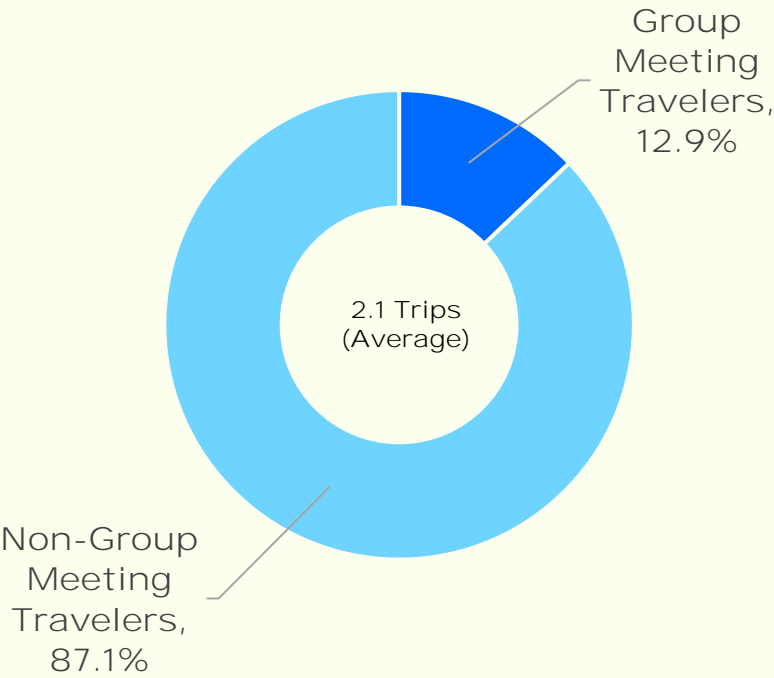




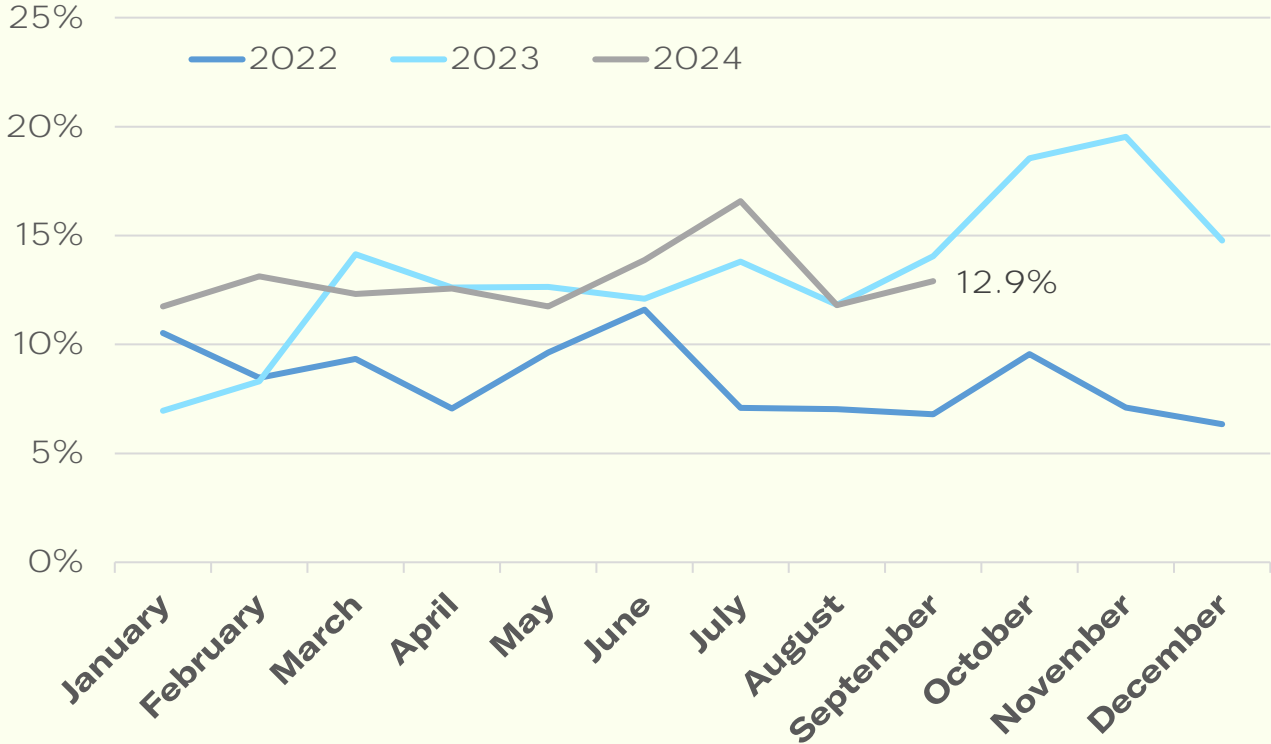
# Overnight group meetings travel was down slightly in September

*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



# 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*



# The State of the International Traveler Study

Coming in January  
2025



# Passion Profiles



**Future Partners**

# 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



Visitor Profile

# Let's keep the conversation going



*[instagram.com/futurepartners.tourism/](https://www.instagram.com/futurepartners.tourism/)*



*[Info@futurepartners.com](mailto:Info@futurepartners.com)*



*[tiktok.com/@future.partners](https://www.tiktok.com/@future.partners)*



*[Livestream Calendar](#)*

# Thank You!

*November Livestream  
Registration*

