THE STATE OF THE AMERICAN TRAVELER

Presented by Destination Analysts

JUNE 2023
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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 17-21

• 4,000+ fully completed surveys collected each wave

• Confidence interval of +/- 1.55%

• Data is weighted to reflect the actual population of each region
What One Word Describes How You Feel About Travel Right Now?
What ONE WORD best describes how you feel about travel right now?

(Everyone: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
TRAVELER SENTIMENT
**Question:**

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

- **Much better off**: 8.0% (29.5%)
- **Better off**: 21.6%
- **UNCHANGED - Neither better off nor worse off**: 35.6%
- **Worse off**: 26.8%
- **Much worse off**: 8.1% (34.9%)

*(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)*
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?

Leading into the summer season, travelers are feeling somewhat less financially well off than they were one year ago.
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?

- Yes - It is a very good time: 6.9%
- Yes - It is a good time: 20.6%
- It is neither a good time nor bad time: 35.4%
- No - It is a bad time: 24.0%
- No - It is a very bad time: 37.1%

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
The proportion of Americans who feel it is a “good time” to spend on leisure travel dropped again this month.
Question:

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

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
Recessionary concerns continue to be widespread.
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?

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
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?

Traveler expectations for their financial prospects in the next year have been trending upward.
Question:
Right now, I am being careful with my money because I'm concerned about an upcoming recession.

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
More travelers are exercising spending caution due to these recessionary concerns.
Statement: High travel prices have kept me from traveling in the past month.

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
Statement: Recent inflation in consumer prices has led me to cancel an upcoming trip.
**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):

(Base: All respondents, 4,180 completed surveys.  
Data collected May 17-21, 2023.)

- $10,000 or more: 10.2%
- $5,000 - $9,999: 17.3%
- $2,000 - $4,999: 28.1%
- $1,000 - $1,999: 18.5%
- $500 - $999: 11.4%
- $100 - $499: 8.6%
- Under $100: 6.0%

Mean = $3,718
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):

_________

(Base: All respondents, 1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022 and 2023)
**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)

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
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)

Average score: 11-point scale

Record High Excitement

8.3

More excitement

Less excitement

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)
Affluent households are significantly more excited about travel in the next year.
Across all regions, excitement for leisure travel remains high.
Older travelers show high levels of excitement for travel.

Average score: 11-point scale
Residents of rural areas continue to shower lesser degrees of travel enthusiasm.

Average score: 11-point scale
Parents travel excitement remains high.

Average score: 11-point scale
EXCITEMENT FOR TRIP TYPES

Question: Thinking carefully about THE NEXT TWELVE (12) MONTHS. Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to take each of these types of trips?

(Base: All respondents, 4,180 completed survey
Data collected May 17-21, 2023.)

- Family trips (your nuclear family only): 65.8%
- Romantic getaways: 53.5%
- Girlfriend trips: 39.2%
- Solo trips (traveling alone): 36.8%
- Wellness and healing trips: 34.4%
- Multi-couple trips (no kids): 33.7%
- Multi-family trips (more than 1 nuclear family): 32.9%
- Reunion trips (Family, military, school, etc.): 31.4%
- Multi-generational trips (3 or more generations): 28.3%
- Guy getaways: 23.2%
- Combined business and leisure trips: 20.0%
- Workcations (Extended trips where you work remotely): 18.2%

Top 3 Box Score (8, 9 or 10)
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 as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in 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)
Current travel enthusiasm has been regressing in the past 2 months.

Expectations for future travel is down very slightly this month, but stands virtually unchanged from one year ago.

Note: These indices measure change in sentiment relative to Feb 2022.
INTERNATIONAL TRAVEL
Question:
How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

(Base: All respondents, 4,057 completed surveys. Data collected March 15-22, 2023.)
Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

Expectations for travel outside the United States have been moving slowly downward this year.
**Most Desired Foreign Destinations in the Next 12 Months (Unaided)**

**Question:** Which foreign destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations outside the United States)

(Base: All respondents, 2,418 completed surveys. Data collected May 17-18, 2023.)
Question: Which domestic destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations in the United States)

(Base: All respondents, 3,749 completed surveys.
Data collected May 17-18, 2023.)
Marketing TRAVEL
**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)

(Base: All respondents, 4,180 completed surveys. Data collected May 17-18, 2023.)

<table>
<thead>
<tr>
<th>Source</th>
<th>Receptiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites found via a search engine</td>
<td>40.5%</td>
</tr>
<tr>
<td>Facebook</td>
<td>31.9%</td>
</tr>
<tr>
<td>Email</td>
<td>31.6%</td>
</tr>
<tr>
<td>Online content (articles and blogs)</td>
<td>28.0%</td>
</tr>
<tr>
<td>Instagram</td>
<td>22.0%</td>
</tr>
<tr>
<td>Streaming video services (YouTube, Hulu, etc.)</td>
<td>17.4%</td>
</tr>
<tr>
<td>TikTok</td>
<td>16.1%</td>
</tr>
<tr>
<td>Review websites (Yelp, TripAdvisor, etc.)</td>
<td>15.6%</td>
</tr>
<tr>
<td>Advertisements on the Internet</td>
<td>11.9%</td>
</tr>
<tr>
<td>Travel or lifestyle magazines (printed)</td>
<td>11.7%</td>
</tr>
<tr>
<td>Travel podcasts</td>
<td>11.3%</td>
</tr>
<tr>
<td>Broadcast television</td>
<td>11.1%</td>
</tr>
<tr>
<td>Official local or state visitor guides (printed)</td>
<td>9.6%</td>
</tr>
<tr>
<td>Text messages</td>
<td>9.2%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>8.8%</td>
</tr>
<tr>
<td>Twitter</td>
<td>7.5%</td>
</tr>
<tr>
<td>APPs on my mobile phone</td>
<td>5.2%</td>
</tr>
<tr>
<td>Newspaper travel sections (printed)</td>
<td>5.1%</td>
</tr>
<tr>
<td>Digital influencers</td>
<td>4.2%</td>
</tr>
<tr>
<td>NONE OF THESE</td>
<td>8.3%</td>
</tr>
</tbody>
</table>
Question: How do you generally use online video for helping with your travels? (Select all that accurately complete the sentence)

A general sense of the destinations I’m considering visiting: 30.5%
Inspiration on where to travel: 25.8%
Inspiration on what to do while traveling (activities/attractions): 23.6%
Ideas for where to eat: 22.7%
Simply for entertainment: 19.2%
To find deals and discounts: 18.1%
NONE OF THESE: 35.9%

(Base: All respondents, 4,180 completed surveys. Data collected May 17-18, 2023.)
PLANNING WINDOW FOR DOMESTIC LEISURE TRAVEL

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

**Historical data Mean in Weeks**

<table>
<thead>
<tr>
<th>Weeks</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 or more</td>
<td>7.8%</td>
</tr>
<tr>
<td>21-24 weeks</td>
<td>4.0%</td>
</tr>
<tr>
<td>17-20 weeks</td>
<td>6.4%</td>
</tr>
<tr>
<td>13-16 weeks</td>
<td>10.6%</td>
</tr>
<tr>
<td>9-12 weeks</td>
<td>21.5%</td>
</tr>
<tr>
<td>5-8 weeks</td>
<td>26.3%</td>
</tr>
<tr>
<td>1-4 weeks</td>
<td>23.4%</td>
</tr>
</tbody>
</table>

Mean = 10.1 Weeks

(Base: All respondents, 4,180 completed surveys. Data collected May 17-18, 2023.)
Question: How many weeks IN ADVANCE did you begin planning your most recent overnight trip?

(Base: Respondents who took an overnight trip, 2,479 completed surveys. Data collected May 17-18, 2023.)

Overnight Trips: Planning Window

<table>
<thead>
<tr>
<th>Planning Window</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 or more weeks</td>
<td>3.5%</td>
</tr>
<tr>
<td>21-24 weeks</td>
<td>1.7%</td>
</tr>
<tr>
<td>17-20 weeks</td>
<td>2.7%</td>
</tr>
<tr>
<td>13-16 weeks</td>
<td>5.6%</td>
</tr>
<tr>
<td>9-12 weeks</td>
<td>12.1%</td>
</tr>
<tr>
<td>5-8 weeks</td>
<td>21.9%</td>
</tr>
<tr>
<td>0-4 weeks</td>
<td>52.5%</td>
</tr>
</tbody>
</table>

Mean = 6.3 Weeks
Travel Planning Activities
(Past Week)
TRAVEL PLANNING IN THE PAST WEEK

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

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

In the PAST WEEK I have ____________

- Day-dreamed about taking a leisure trip
- Talked to a friend or relative about a future trip

Talked to a friend about a future trip
In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

Question: In the PAST WEEK I have ____________

- Day-dreamed about taking a leisure trip
- Talked to a friend or relative about a future trip
- Researched travel ideas online

Researched Travel Ideas Online
TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have ____________

Made Travel Reservations

Day-dreamed about taking a leisure trip
Researched travel ideas online
Talked to a friend or relative about a future trip
Made travel reservations (lodging, transportation, tickets, etc.)
Question: In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have ______________

- Day-dreamed about taking a leisure trip
- Talked to a friend or relative about a future trip
- Researched travel ideas online
- Researched travel ideas offline (magazines, printed visitor guides, etc.)
- Made travel reservations (lodging, transportation, tickets, etc.)
TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have ____________

- Day-dreamed about taking a leisure trip
- Talked to a friend or relative about a future trip
- Researched travel ideas online
- Researched travel ideas offline (magazines, printed visitor guides, etc.)
- Made travel reservations (lodging, transportation, tickets, etc.)
- NONE OF THESE

Graph showing percentage of respondents who engaged in each activity over time.
**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)

(Base: All respondents, 4,023 completed surveys. Data collected April 15-22, 2023.)
**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)

*(Base: All respondents, 4,023 completed surveys. Data collected April 15-22, 2023.)*

- Travel is too expensive right now (41.8%)
- Personal financial reasons (38.4%)
- Gasoline was too expensive (37.0%)
- Airfare was too expensive (28.9%)
- I'm too busy at work (20.6%)
- Not enough PTO/vacation time (14.4%)
- Safety concerns - risk of contracting the COVID virus (12.3%)
- Crowds - too many people traveling (10.8%)
- The possibility of flight cancellations (9.1%)
- Health/Illness (8.8%)
- Safety concerns (other non-COVID related) (8.0%)
- The pandemic is not 100% over (7.8%)
- Weather (6.8%)
- Sold out/No reservations available (3.6%)
- Lack of availability (at hotels, golf courses, spas, etc.) (3.5%)
- NONE OF THESE (16.3%)
**DETERRENTS TO TRAVELING IN THE PAST 6 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)

- Travel is too expensive right now: 41.8%
- Personal financial reasons: 38.4%
- Gasoline was too expensive: 37.0%
- Airfare was too expensive: 28.9%
- I'm too busy at work: 20.6%
- Not enough PTO/vacation time: 14.4%
- Safety concerns - risk of contracting the COVID virus: 12.3%
- Crowds - too many people traveling: 10.8%
- The possibility of flight cancellations: 9.1%
- Health/Illness: 8.8%
- Safety concerns (other non-COVID related): 8.0%
- The pandemic is not 100% over: 7.8%
- Weather: 6.8%
- Sold out/No reservations available: 3.6%
- Lack of availability (at hotels, golf courses, spas, etc.): 3.5%
- NONE OF THESE: 16.3%

(Base: All respondents, 4,023 completed surveys. Data collected April 15-22, 2023.)
DETERRENTS TO TRAVELING IN THE PAST 6 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)

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- The pandemic is not 100% over (7.8%)
- Weather (6.8%)
- Sold out/No reservations available (3.6%)
- Lack of availability (at hotels, golf courses, spas, etc.) (3.5%)
- NONE OF THESE (16.3%)

(Base: All respondents, 4,023 completed surveys.
Data collected April 15-22, 2023.)
**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 is too expensive
- Gasoline too expensive
- Airfare was too expensive
- Personal financial reasons
- Safety concerns - risk of contracting the COVID virus
- The possibility of flight cancellations
- The pandemic is not 100% over
- Safety concerns (other non-COVID related)
- NONE OF THESE

(Base: All respondents, 4,000+ completed surveys each wave. Data collected July 2022 - May 2023.)
American Travelers’ Predictions for 2023

% SHOWN ARE THOSE THAT SAY HIGH LIKELIHOOD/CERTAINTY

TRAVEL INDUSTRY
“Price gouging will become more common” (24%)

PERSONAL
“2023 will be a great year for me” (30%)

FINANCIAL
“Interest in investing in cryptocurrencies will decrease” (23%)

TRIPS
“I’ll take a dream trip to somewhere exciting” (23%)

MEDIA
“TikTok will become America’s most popular social media channel” (18%)

GEO-POLITICAL
“The war between Ukraine and Russia will expand into other countries” (14%)

TRAVEL EXPERIENCES
“More authentic, less commercial travel experiences will grow in popularity” (18%)
Question: Let’s talk about next year. Thinking about how 2023 will evolve, how likely do you think each of the following will be? (Please use the scale below to give us your best guess for each)

(Base: All respondents, 4,017 completed surveys. Data collected December 15-24, 2022.)
Question:

What are your travel pet peeves?

Please select those you find most bothersome. (Click and drag as many as 3)

(Base: All respondents, 4,057 completed surveys. Data collected March 15-22, 2023.)
Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?
**How Has the Travel Experience Changed?**

**Question:** Compared to before the pandemic, how would you rate each of the following aspects of traveling right now?

### The Good

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Improved</th>
<th>Much Improved</th>
</tr>
</thead>
<tbody>
<tr>
<td>My ability to have fun and enjoy travel</td>
<td>17.9%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Atmosphere or vibe in the destinations I visit</td>
<td>18.0%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Customer service in hotels</td>
<td>17.4%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Value for the money I receive</td>
<td>11.9%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Behavior of other travelers</td>
<td>11.8%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Reliability of air travel (timeliness, flight availability, etc.)</td>
<td>10.6%</td>
<td>5.6%</td>
</tr>
<tr>
<td>The overall cost of traveling</td>
<td>8.0%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

### The Bad

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Much worse</th>
<th>Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>The overall cost of traveling</td>
<td>25.5%</td>
<td>40.8%</td>
</tr>
<tr>
<td>Value for the money I receive</td>
<td>14.9%</td>
<td>35.6%</td>
</tr>
<tr>
<td>Behavior of other travelers</td>
<td>17.5%</td>
<td>32.9%</td>
</tr>
<tr>
<td>Reliability of air travel (timeliness, flight availability, etc.)</td>
<td>14.3%</td>
<td>30.9%</td>
</tr>
<tr>
<td>Customer service in hotels</td>
<td>19.6%</td>
<td></td>
</tr>
<tr>
<td>Atmosphere or vibe in the destinations I visit</td>
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<td></td>
</tr>
<tr>
<td>My ability to have fun and enjoy travel</td>
<td>14.7%</td>
<td></td>
</tr>
</tbody>
</table>

(Base: All respondents, 4,023 completed surveys. Data collected April 16-21, 2023.)
A Special Thanks!
Sticker Shock

is the surprise and dismay a traveler might experience on being informed of a product or service's unexpectedly high price.
Question:
Thinking of the last time you were planning a trip (i.e., prior to leaving home), did you experience any sticker shock?

38%

(Base: All respondents, 4,180 completed surveys. Data collected May 17-21, 2023.)
Question:
For which of the following did you experience sticker shock?
(Select all that apply)

- Hotel rates: 60.2%
- Airfare: 50.2%
- Restaurants and dining costs: 46.8%
- Entertainment, recreation or attraction costs: 41.9%
- Automobile rental fees: 31.8%
- Cruise prices: 14.9%
- NONE OF THESE: 2.1%

(Base: Respondents who experienced sticker shock while planning their most recent trip, 1,589 completed surveys. Data collected May 17-21, 2023.)
Question:
Upon experiencing this sticker shock, which (if any) of the following did you do?
(Select all that apply)

- Found less expensive ways to travel or ways to save money: 47.7% (18%)
- Increased my overall budget for the trip: 27.7% (11%)
- Chose to visit a less expensive destination(s): 25.8% (10%)
- Cancelled my travel plans entirely: 14.8% (6%)
- NONE OF THESE: 11.4%

Base: Respondents who experienced sticker shock while planning their most recent trip, 1,589 completed surveys. Data collected May 17-21, 2023.)
PASSION PROFILES

- Music festivals (multi-day events)
- Musical concerts (pop, rock, hip hop, alternative, modern, etc.)
- Musical concerts (classical, symphonies, etc.)
- Mountain biking (off road or gravel)
- Motorcycle touring
- Hunting (Big game)
- Hunting (Birds, small game)
- Hiking (day hikes)
- Hiking (over-night on trail, longer haul)
- Camping
- Recreational vehicle travel
- Food and cuisine
- Wine
- Craft beers
- Sailing or boating
- Canoeing, kayaking or rafting
- Photography
- Bars, nightclubs
- Theater or plays, (on or off Broadway productions)
- Art museums
- Attending professional sports
- Attending college sports
- Asian pop culture (Anime, Manga, K-Pop, etc.)
- Video games - Video gaming
- Golf
- Fishing (Freshwater)
- Fishing (Saltwater or deep sea)
- Enjoying theme or amusement parks
- Skiing or snowboarding
- Birdwatching - Birding
- Crafting, DIY or creative projects
- Fitness, health and wellness
- Vegan foods & lifestyle
- Fashion
- International travel (taking trips outside the USA)
- Marijuana or cannabis-related products
- Gaming or gambling
- Geocaching
- Shopping
- Visiting historical sites and attractions
- Voluntourism activities (Volunteering while traveling)
- Agri-tourism
BEST PRACTICES IN TIKTOK CONTENT FOR TRAVEL BRANDS FULL REPORT IS AVAILABLE TODAY!

SCAN HERE TO PURCHASE!
MORE RESEARCH WE CAN PROVIDE

• Visitor & Target Audience Profiles
• Audience Persona Identification
• Brand Performance
• Visitor Activity Analysis & Segmentation
• Resident + Stakeholder Research
• Advertising Testing

info@destinationanalysts.com