

THE STATE OF THE AMERICAN TRAVELER

Presented by

Destination Analysts, Inc.

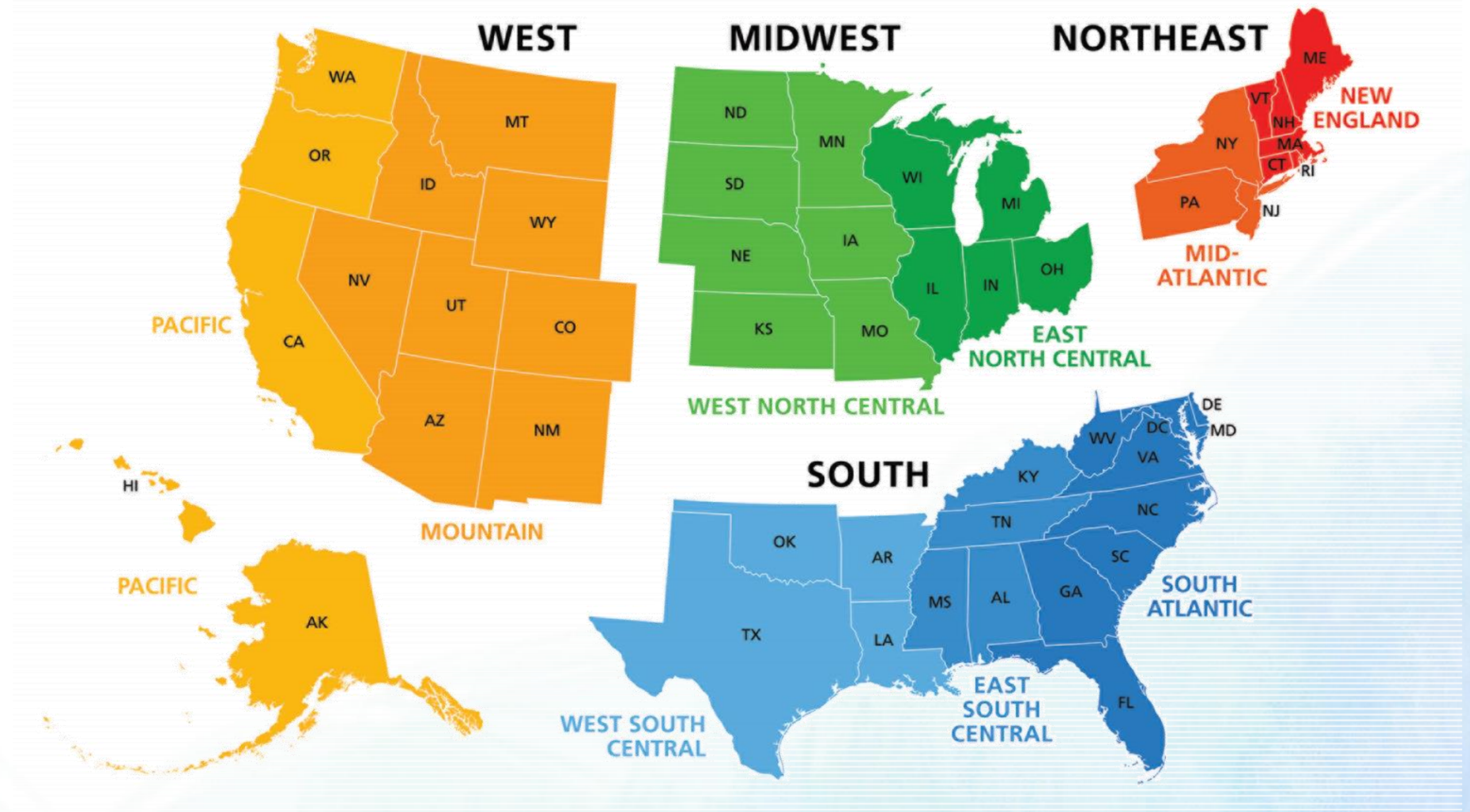
July 2023



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: **June 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

UNITED STATES CENSUS REGIONS AND DIVISIONS

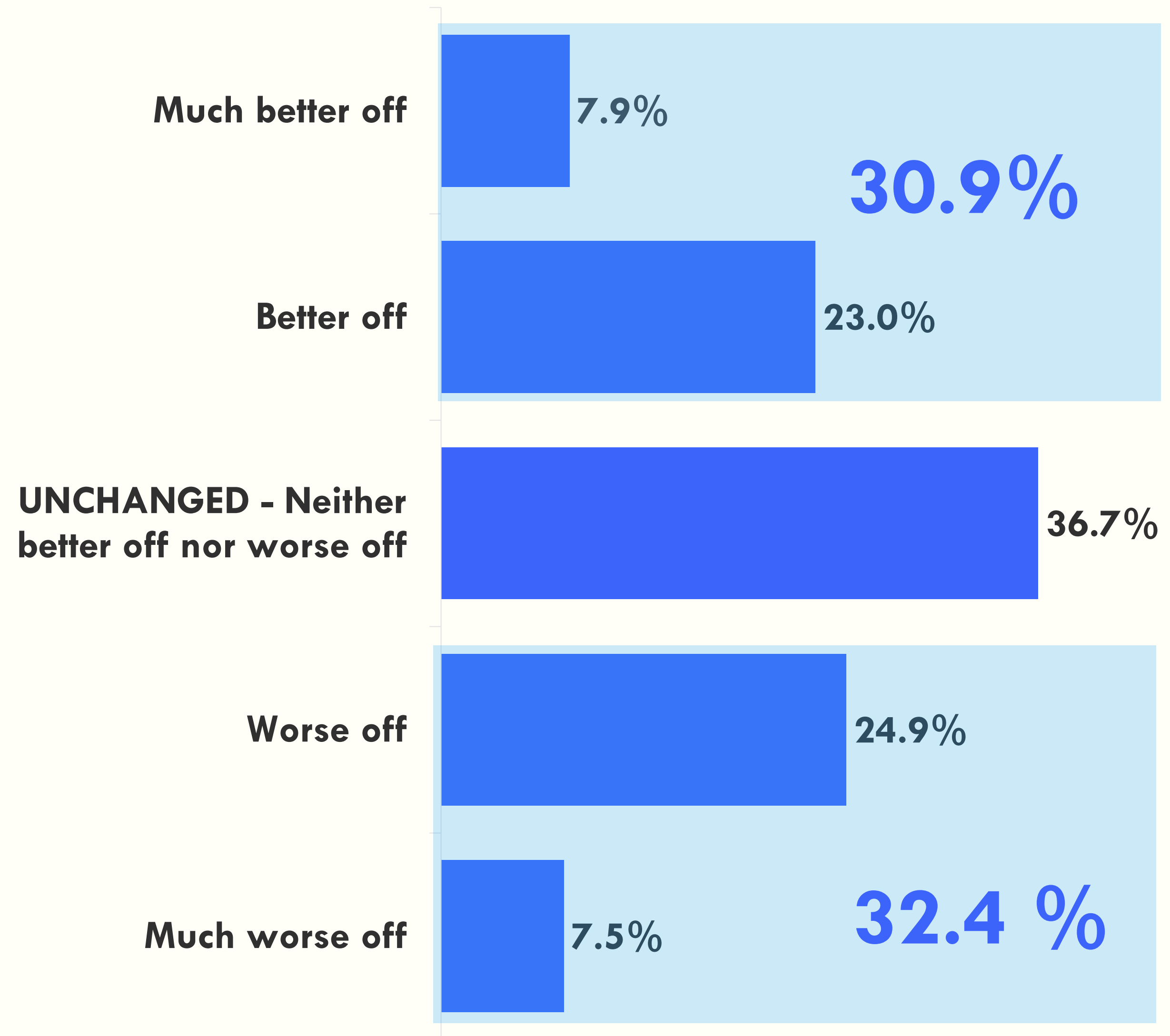


TRAVELER SENTIMENT



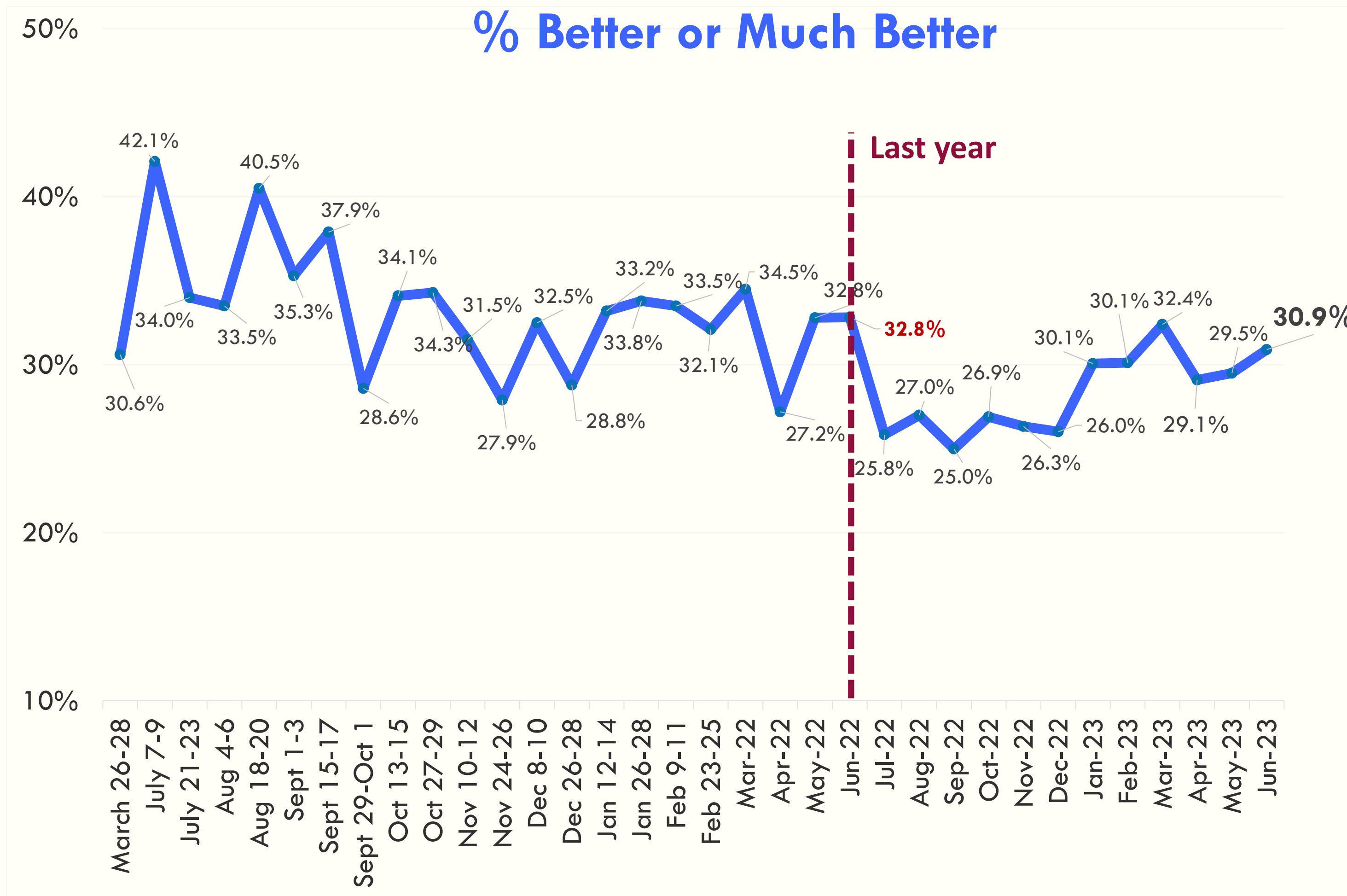
Question:

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



(Base: All respondents, 4,011 completed surveys. Data collected June 17-21, 2023.)

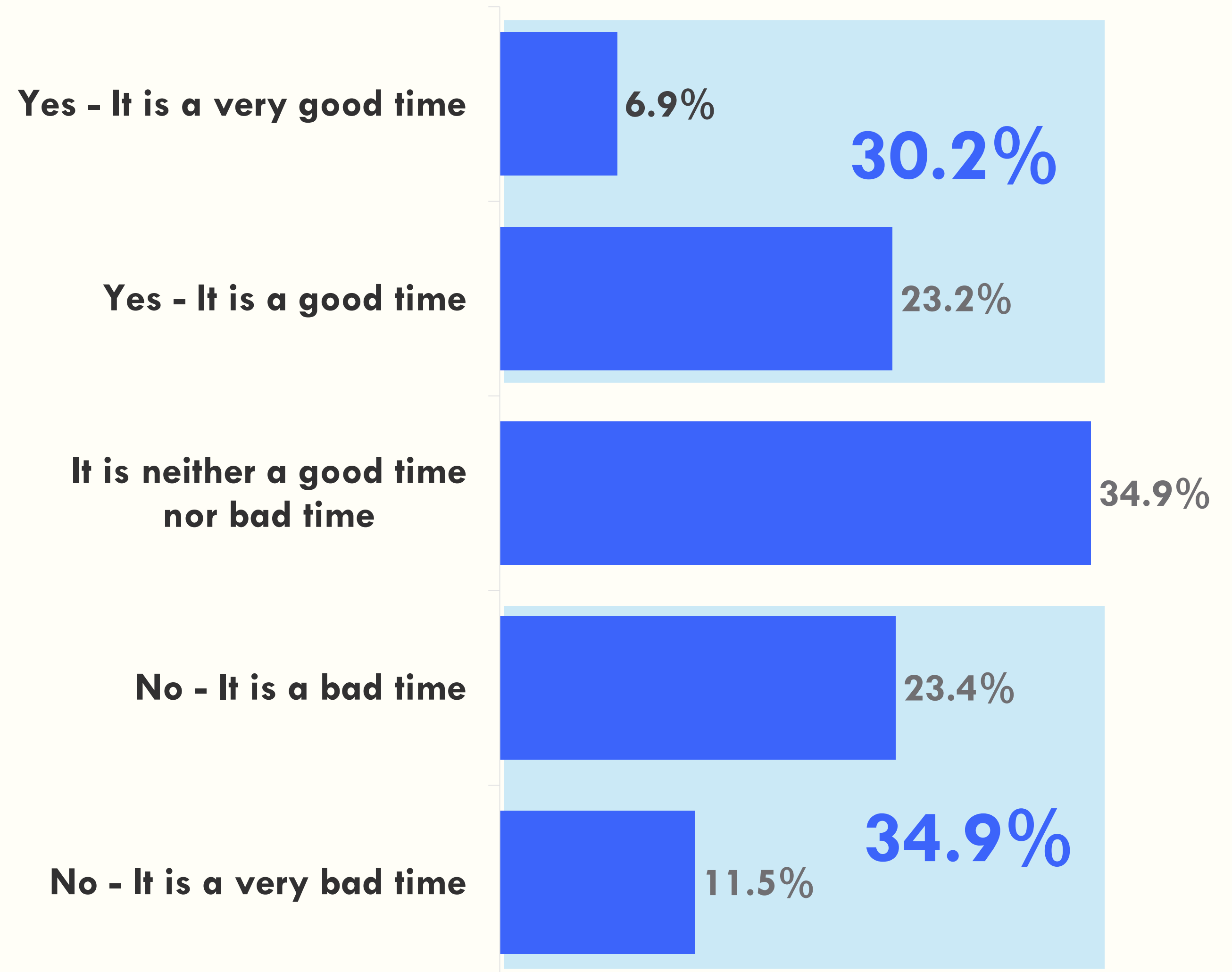
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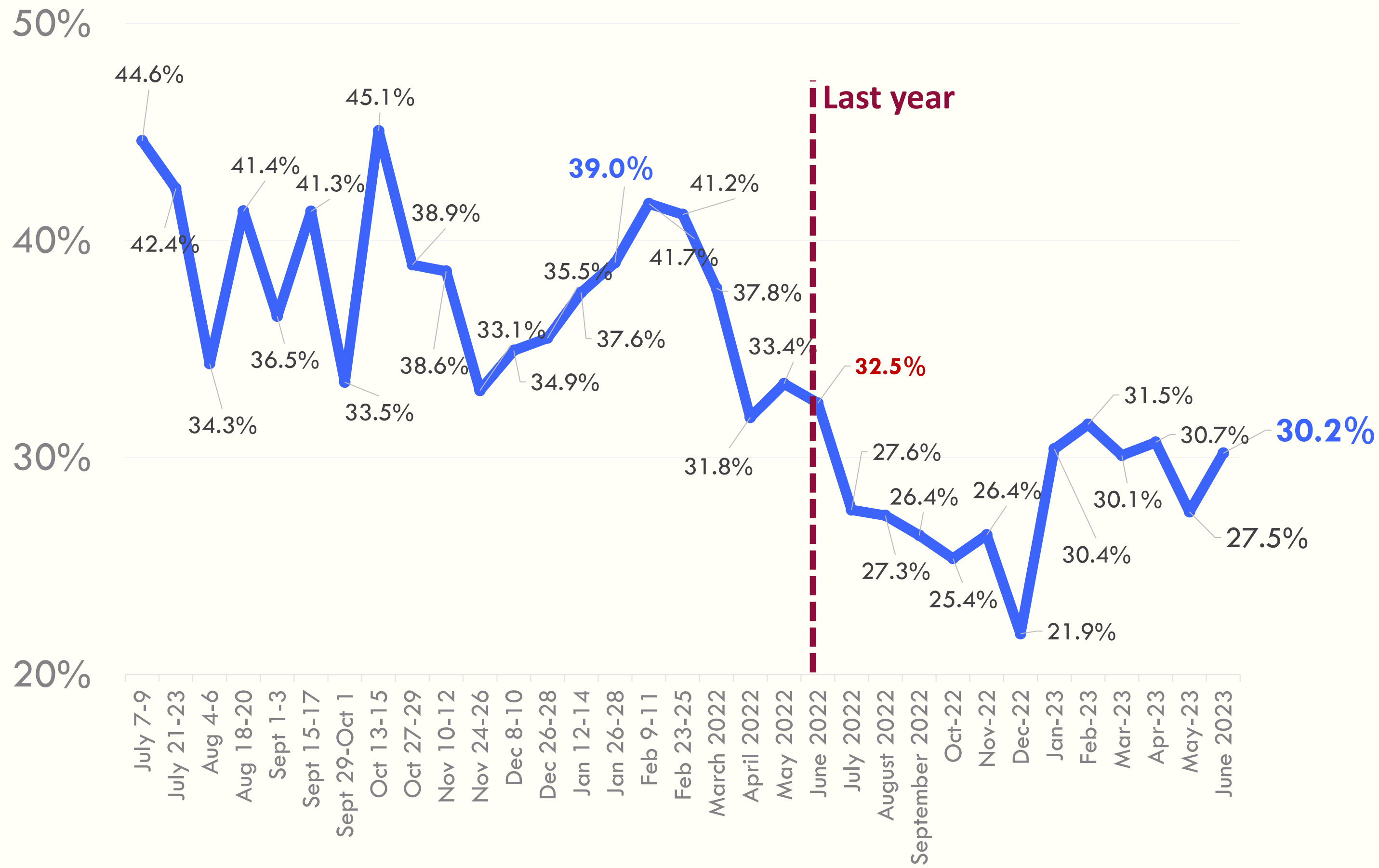
Travelers are feeling slightly less financially well off than they were one year ago.

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?



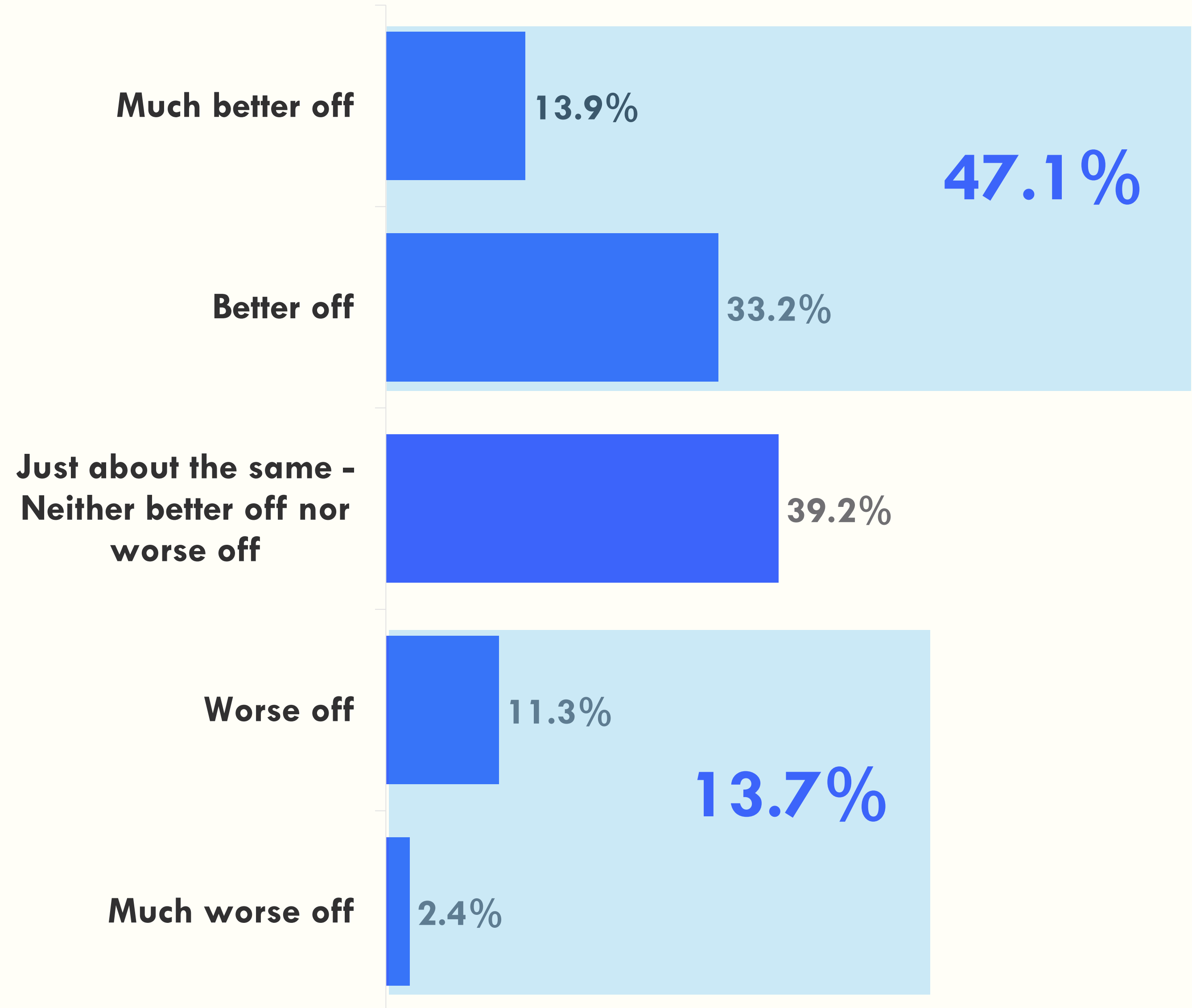
60% % Good or Very good time to spend on travel



The proportion of Americans who feel it is a “good time” to spend on leisure was about 2 points below last year at this time.

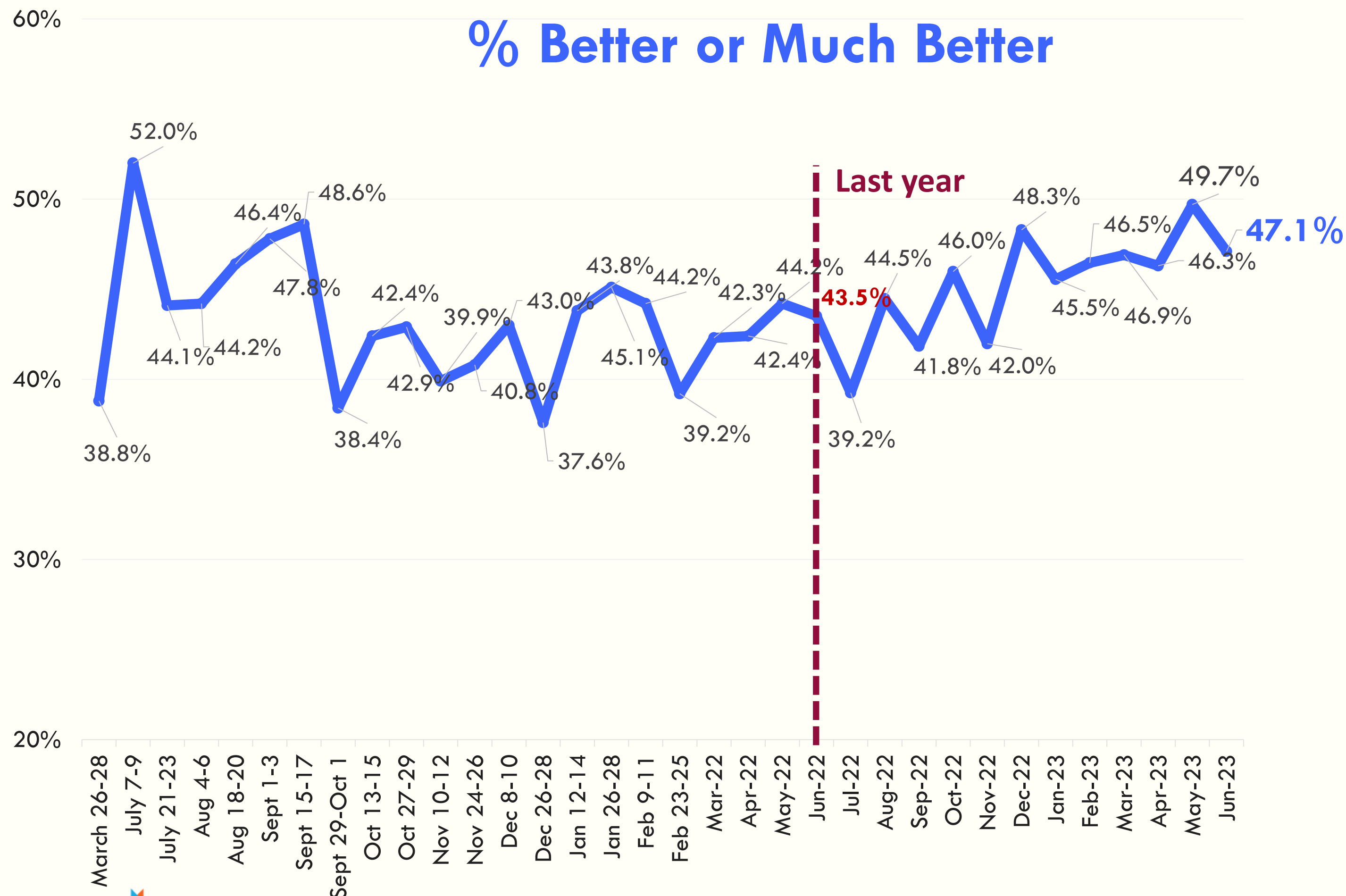
Question:

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, 4,011 completed surveys. Data collected June 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?



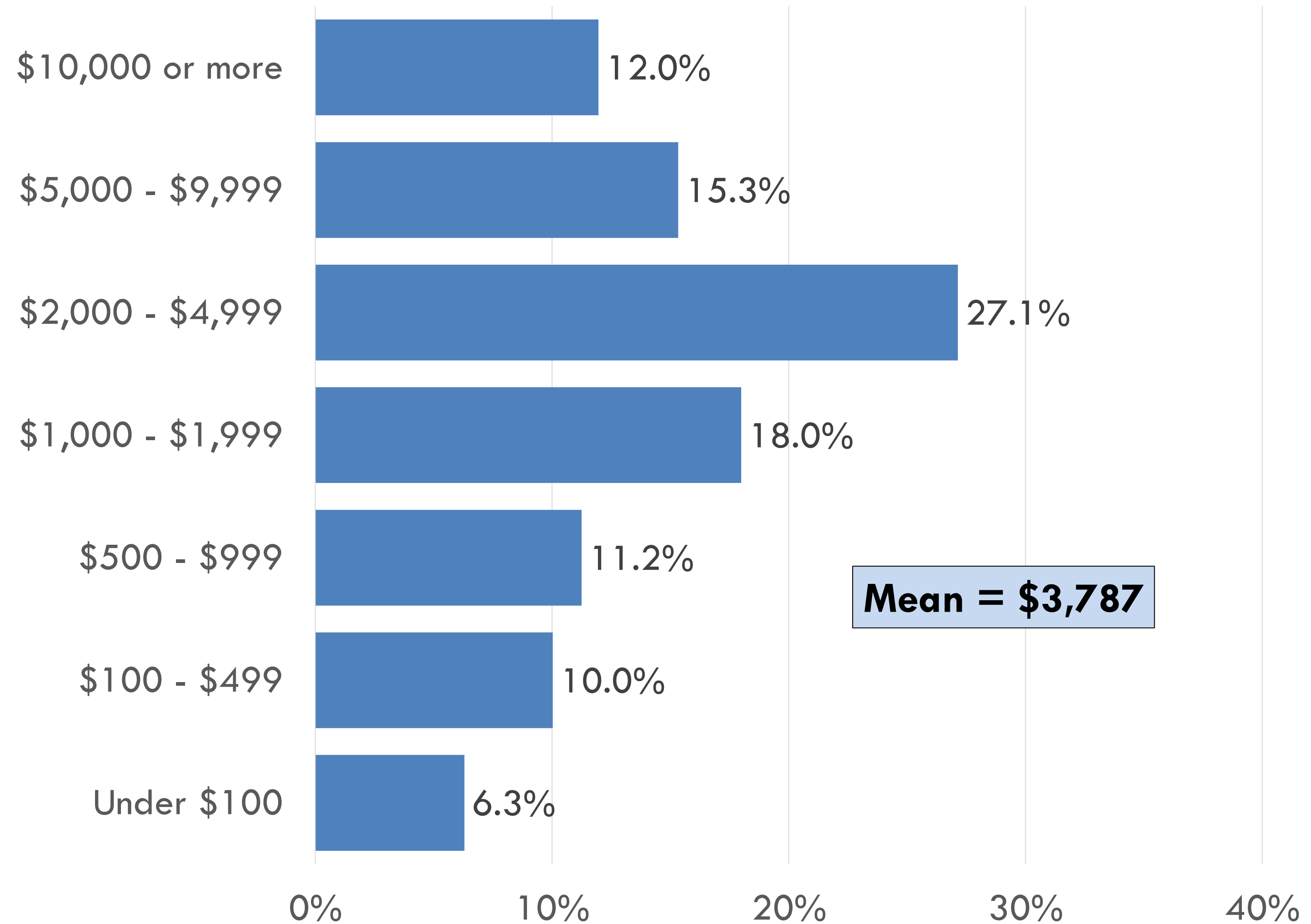
Traveler expectations for their financial prospects in the next year dropped slightly this month.

MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS

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, 4,011 completed surveys.
Data collected June 17-21, 2023.)*

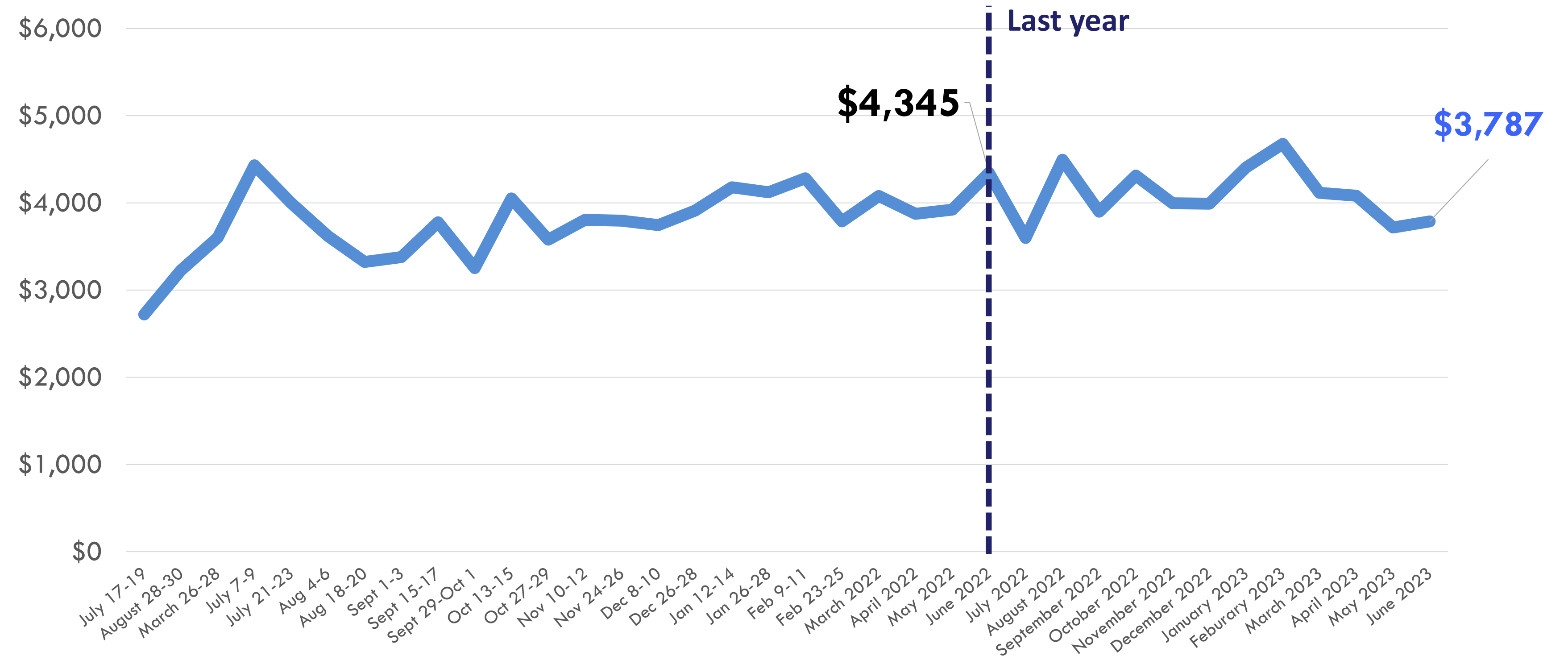


MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS—TIME SERIES

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?

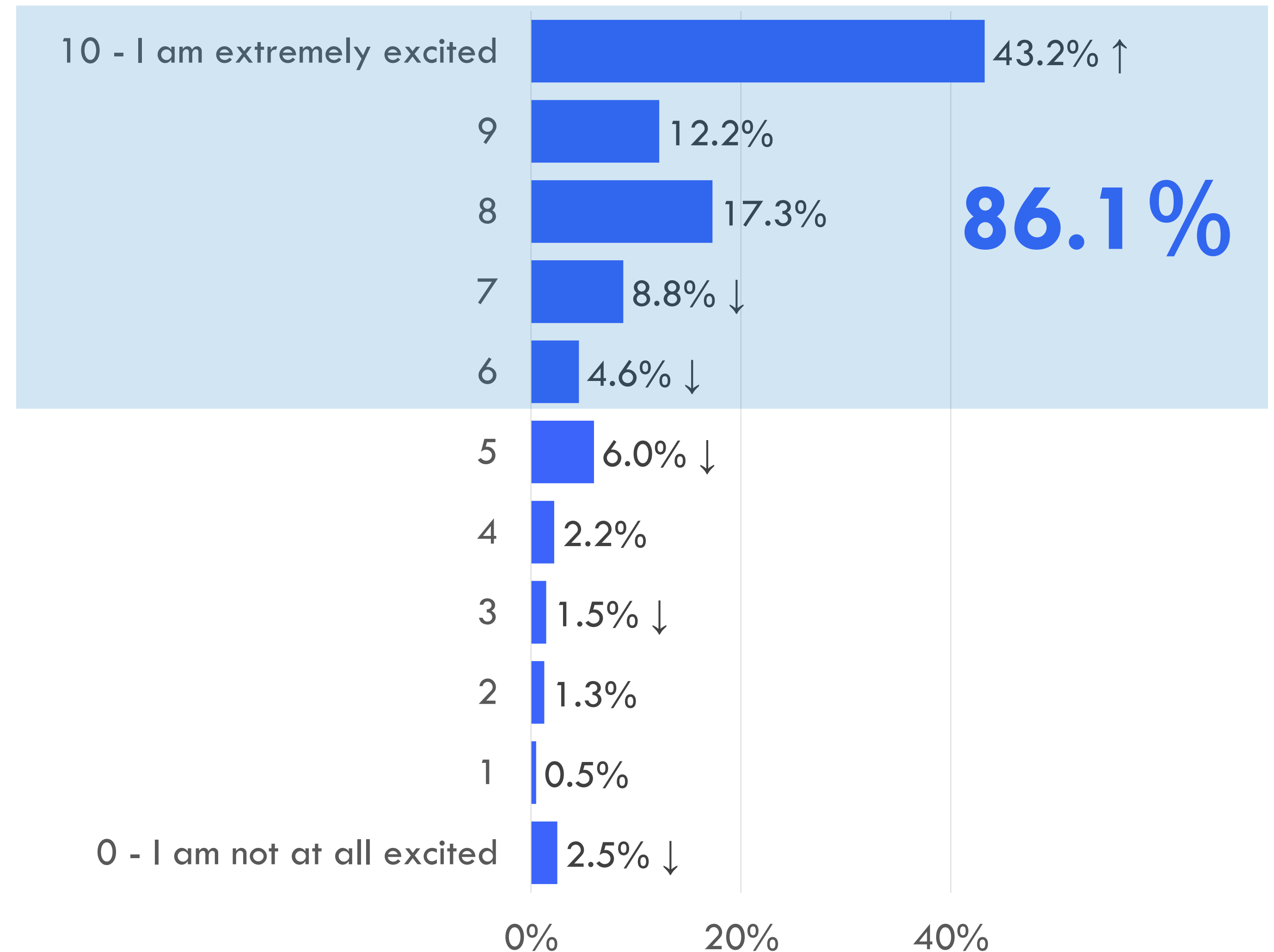
Maximum I would spend on leisure travel (next 12 months): _____

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



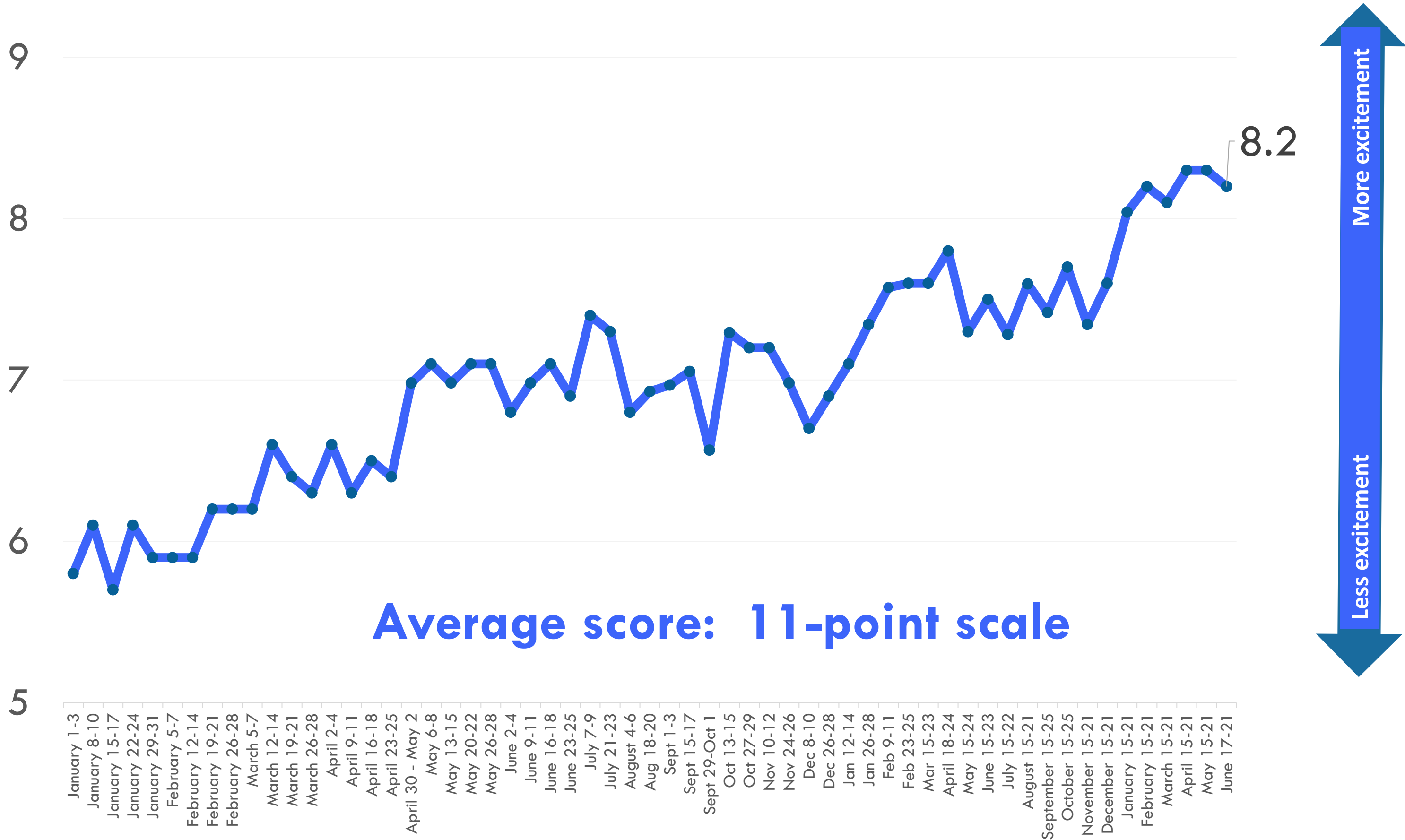
Question:

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, 4,011 completed surveys. Data collected June 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)

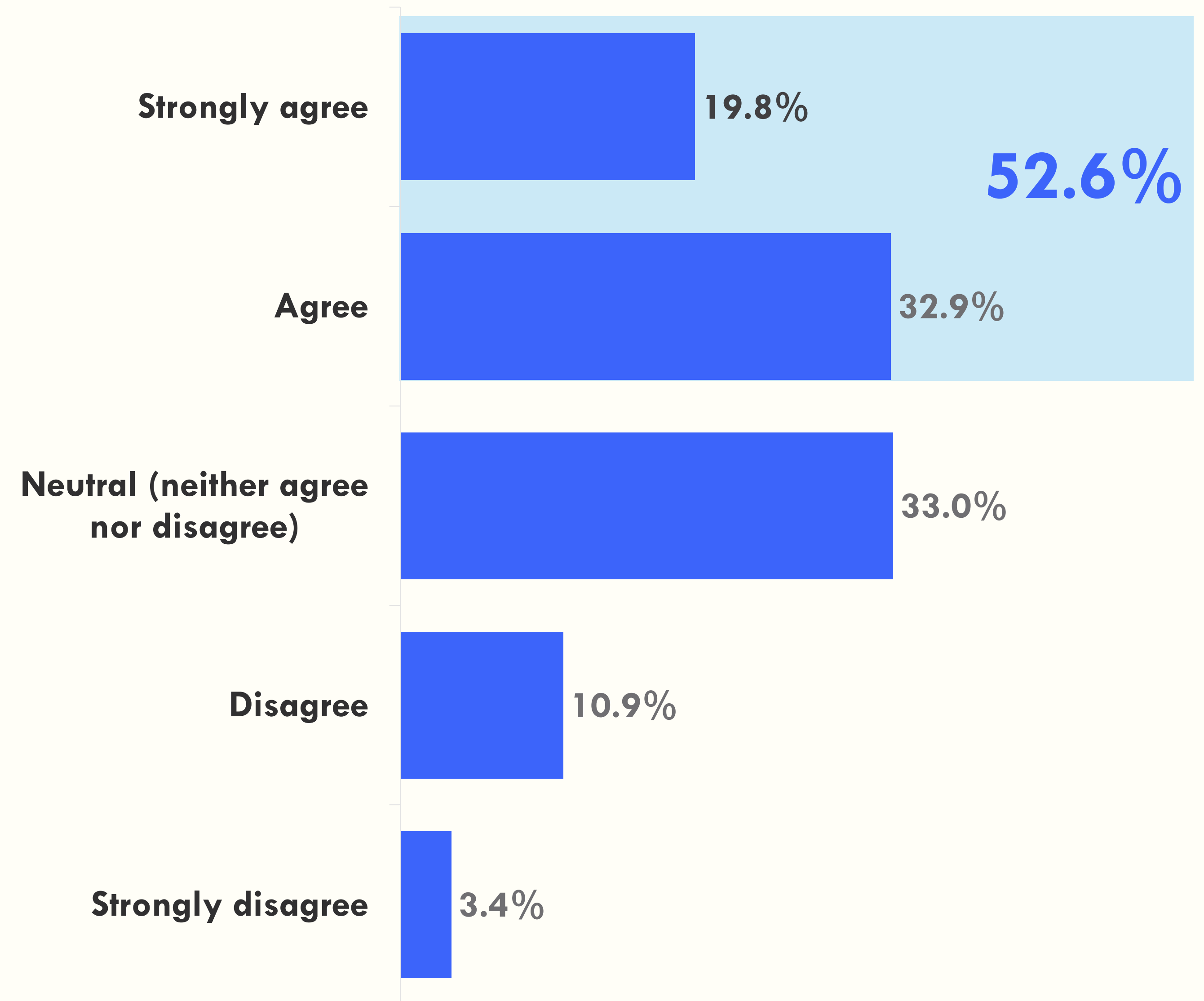


Question:

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

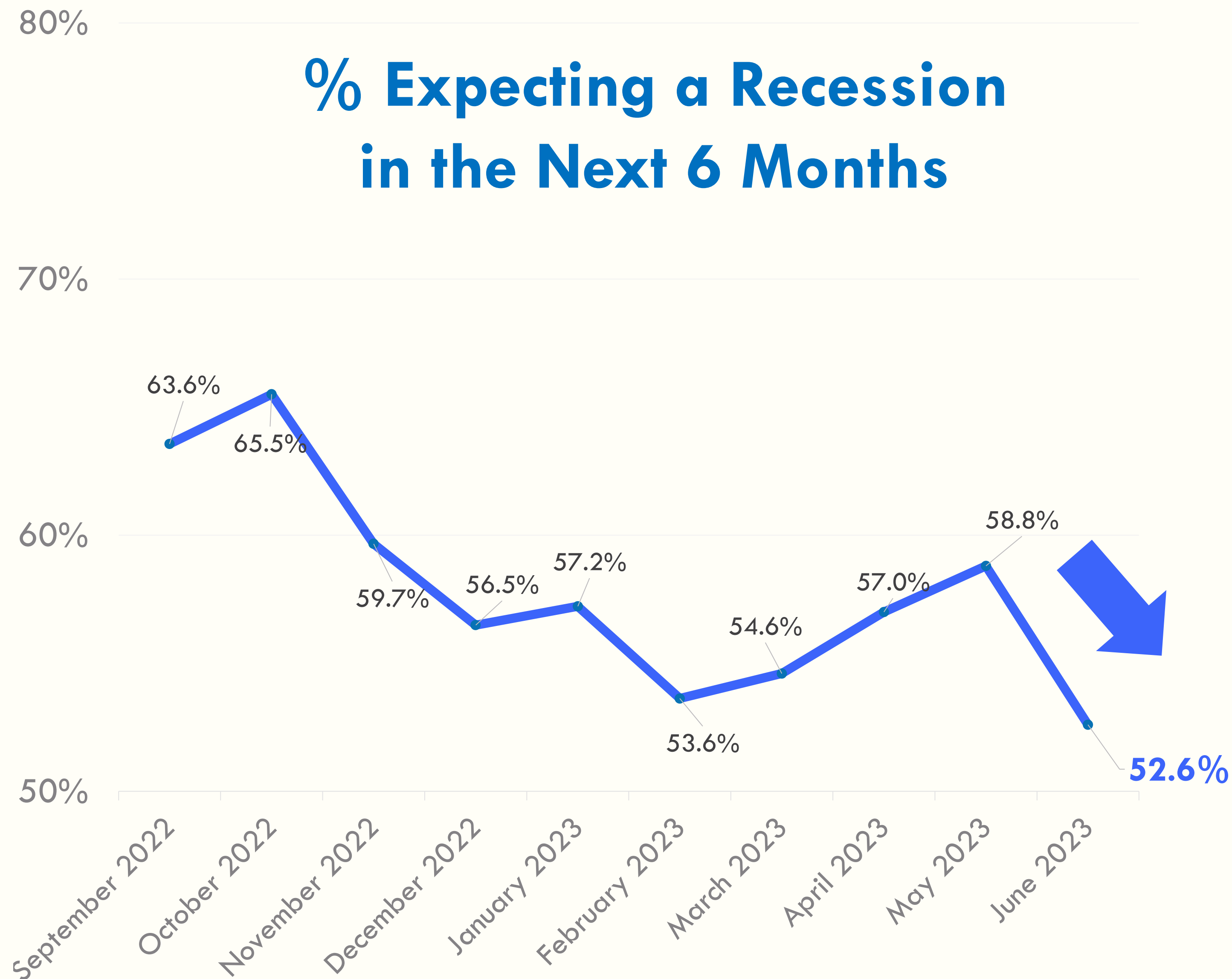
Question:

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



(Base: All respondents, 4,011 completed surveys. Data collected June 17-21, 2023.)

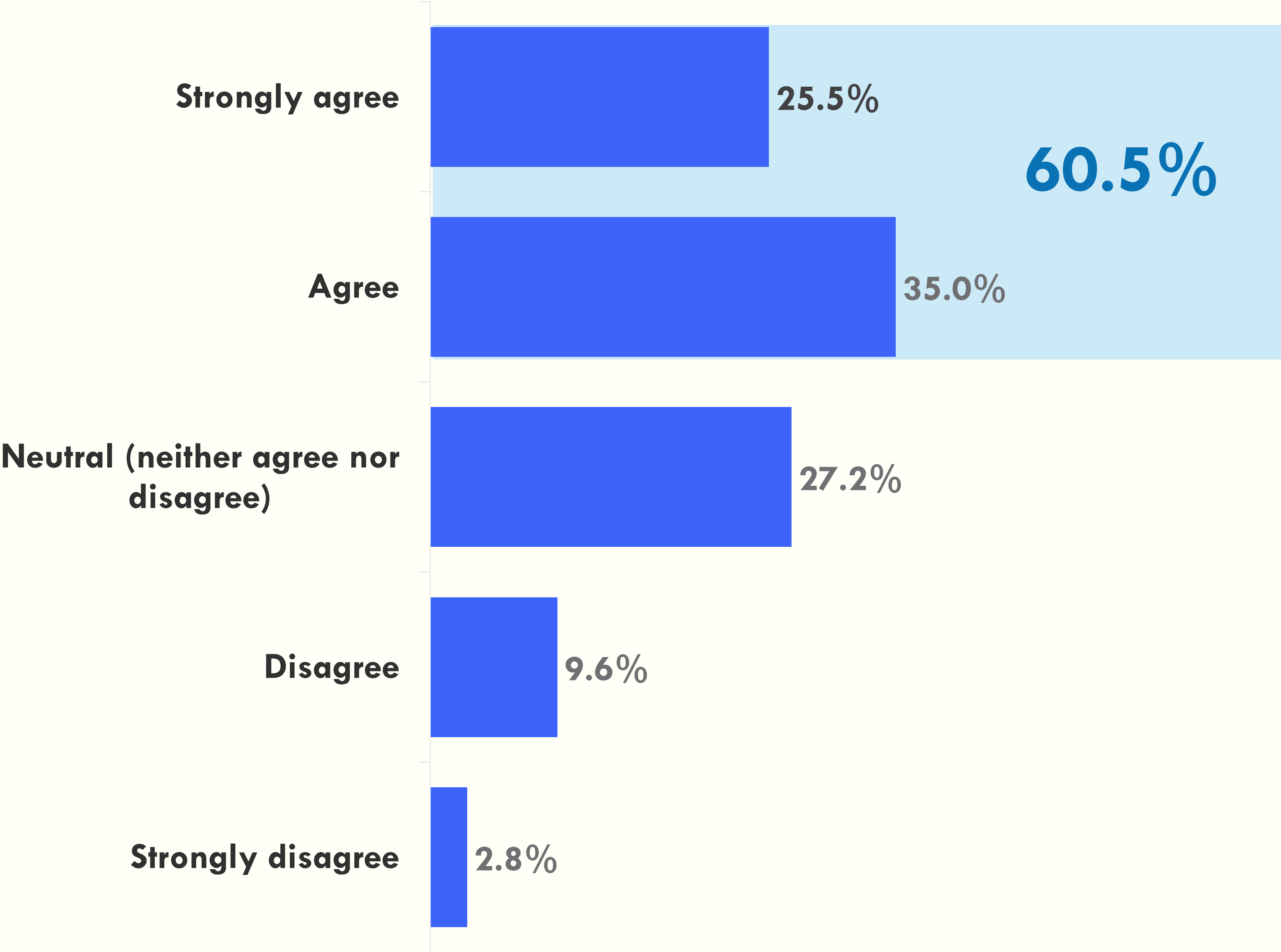
% Expecting a Recession in the Next 6 Months



Recessionary concerns are at the lowest level since we began tracking this metric.

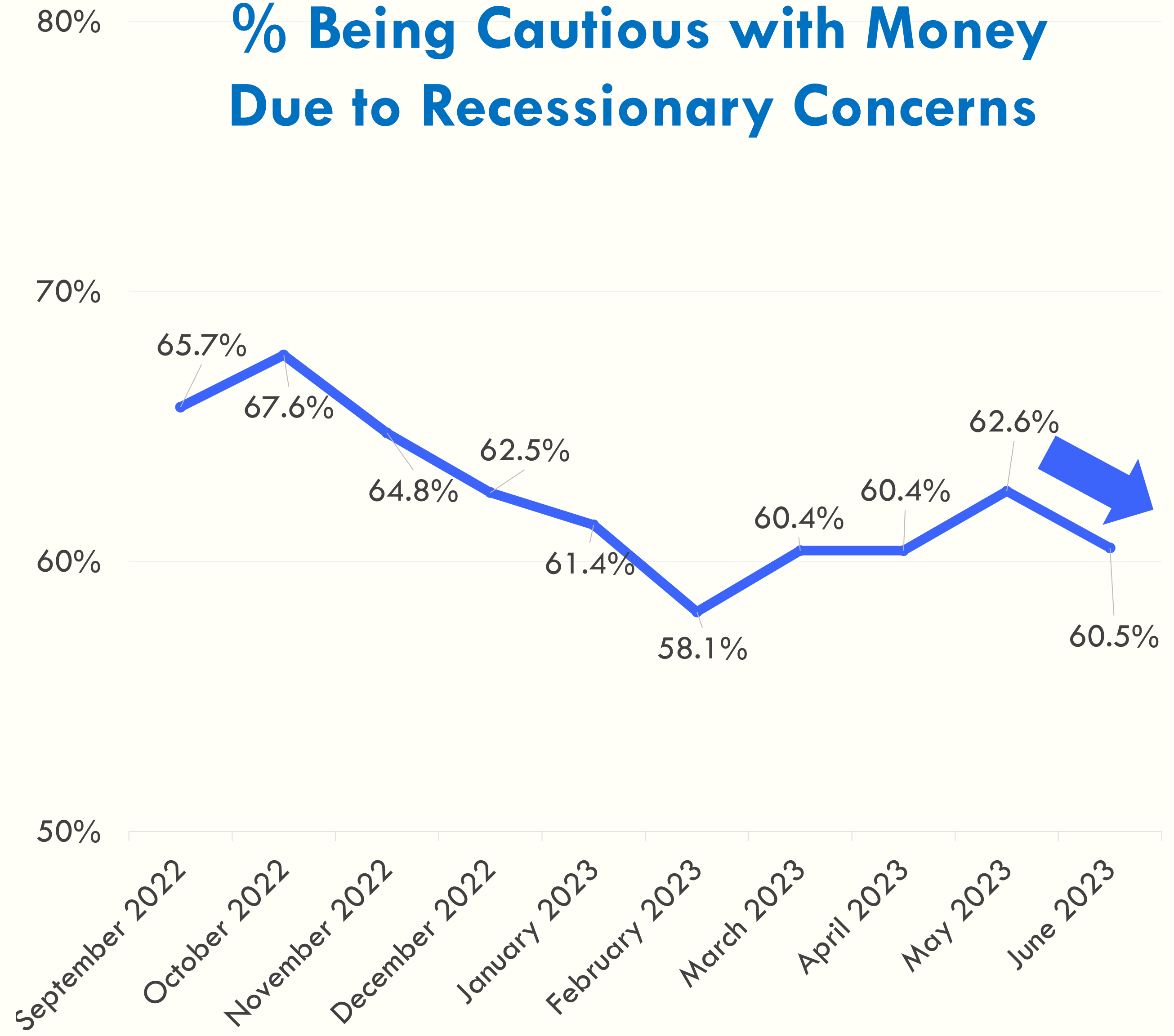
Question:

Right now, I am being careful with my money because I'm concerned about an upcoming recession.



(Base: All respondents, 4,011 completed surveys. Data collected June 17-21, 2023.)

% Being Cautious with Money Due to Recessionary Concerns

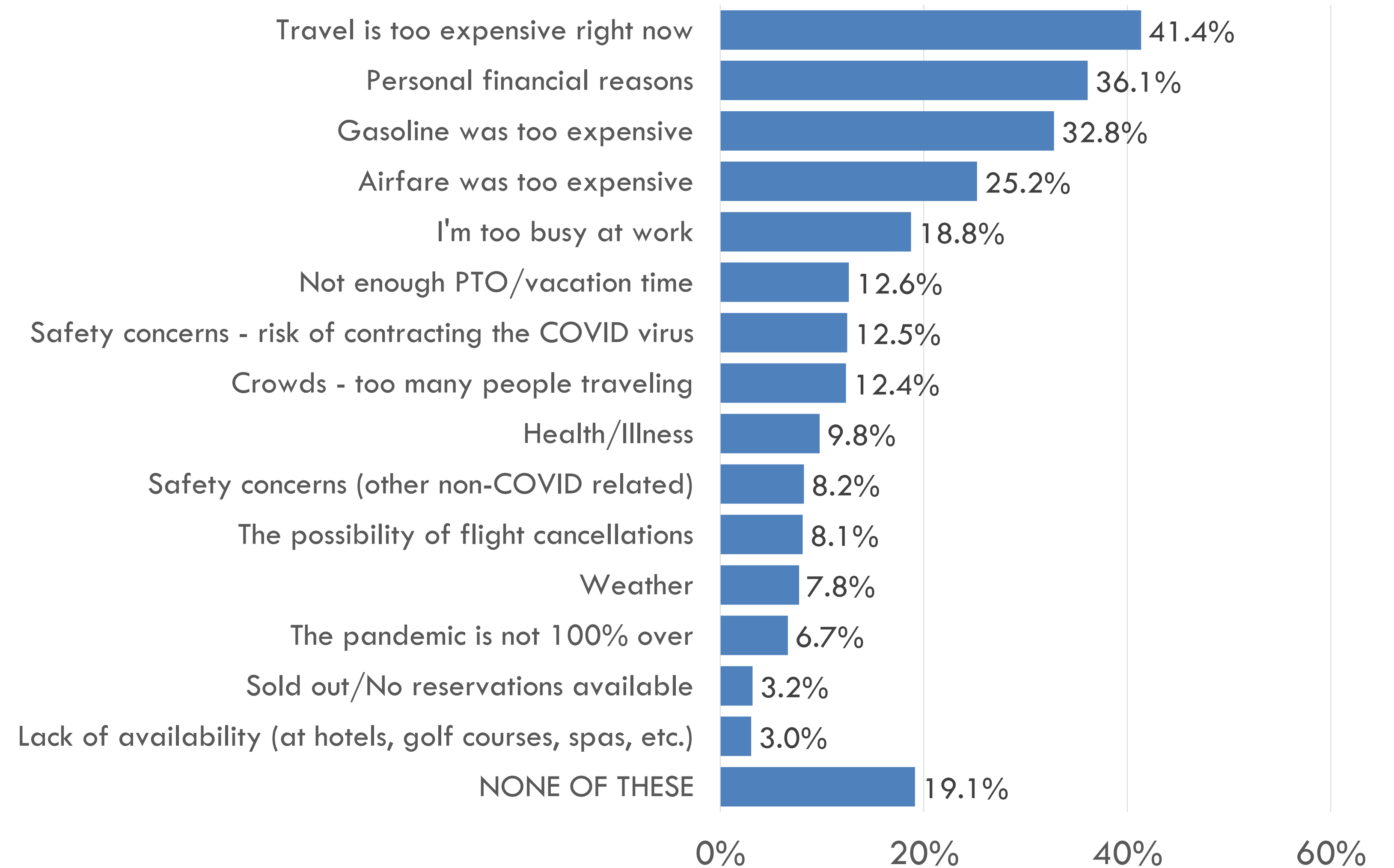


Increases seen in travelers exercising spending caution due these recessionary concerns reversed somewhat this month.

DETERRENENTS 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)

*(Base: All respondents, 4,011 completed surveys.
Data collected June 15-21, 2023.)*



DETERRENENTS 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)

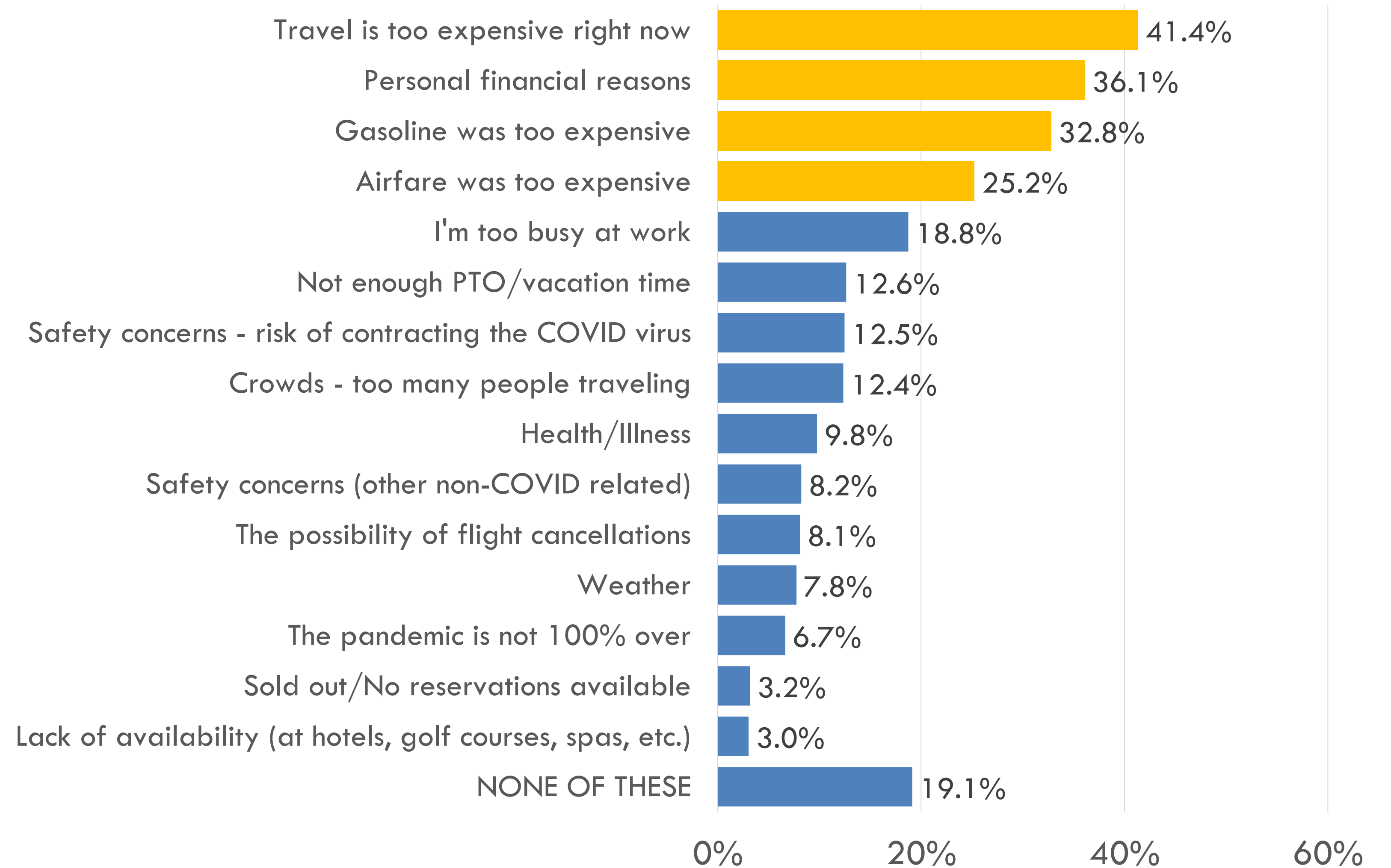
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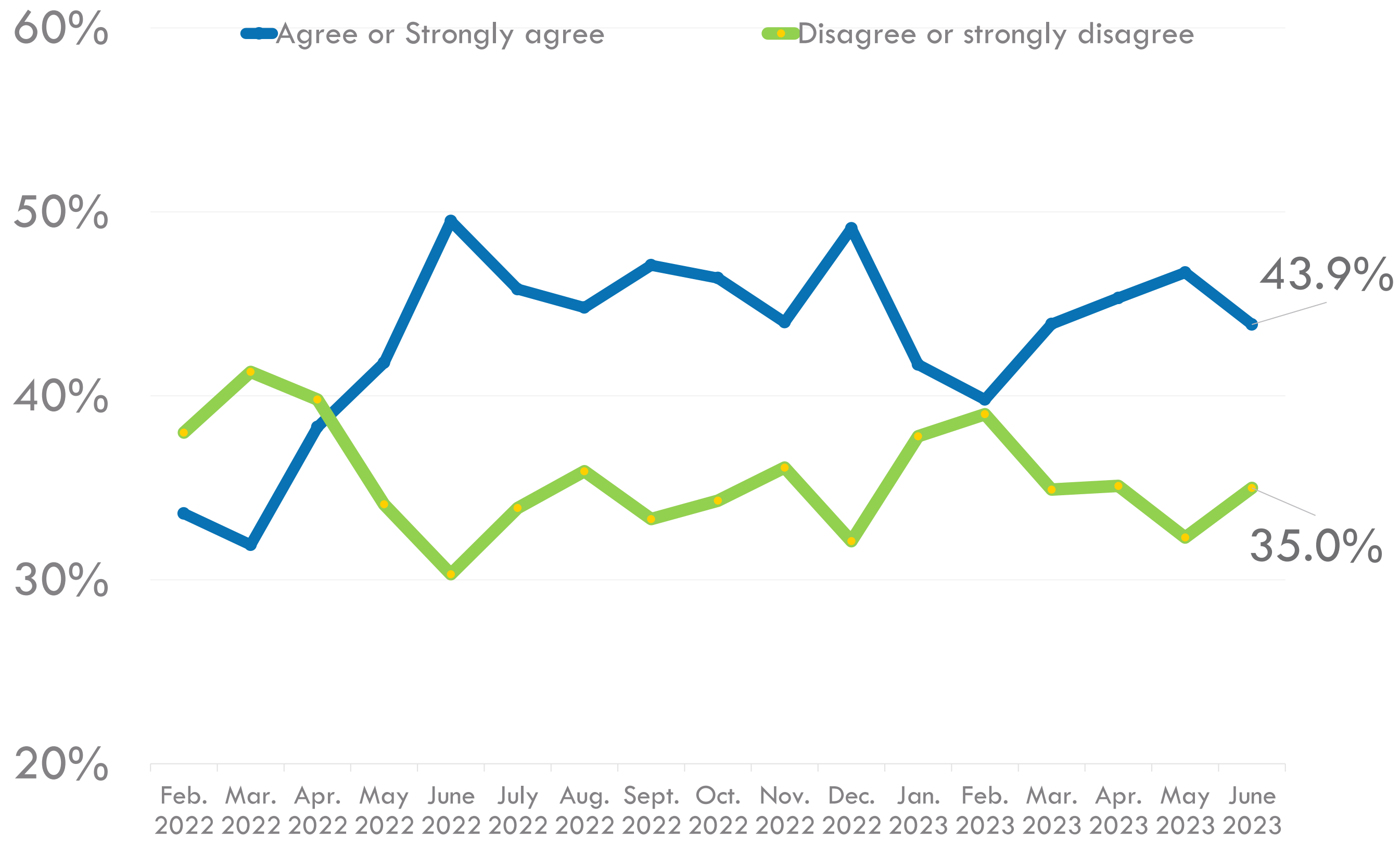
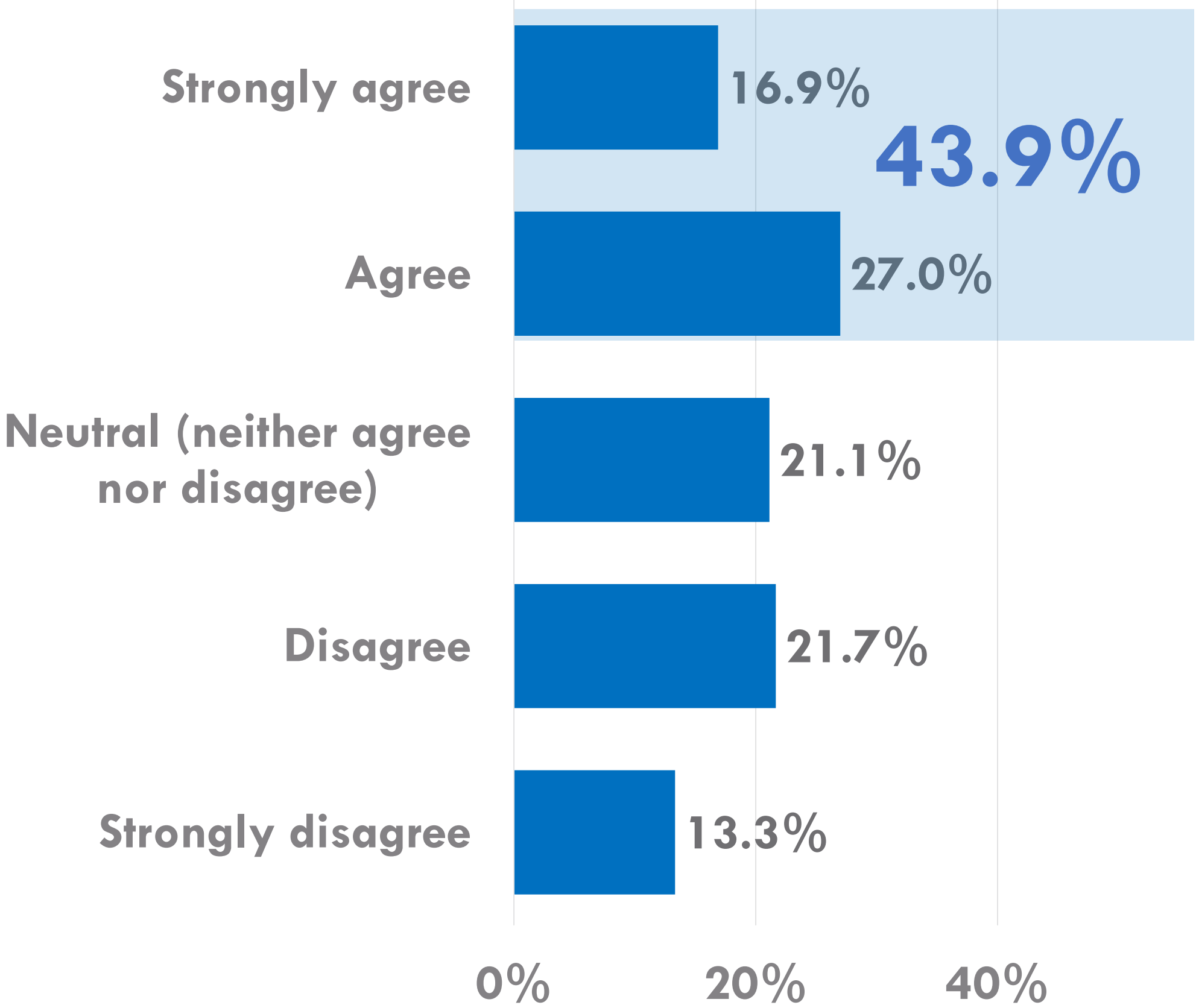
DETERRENTS TO TRAVELING IN THE PAST 6 MONTHS

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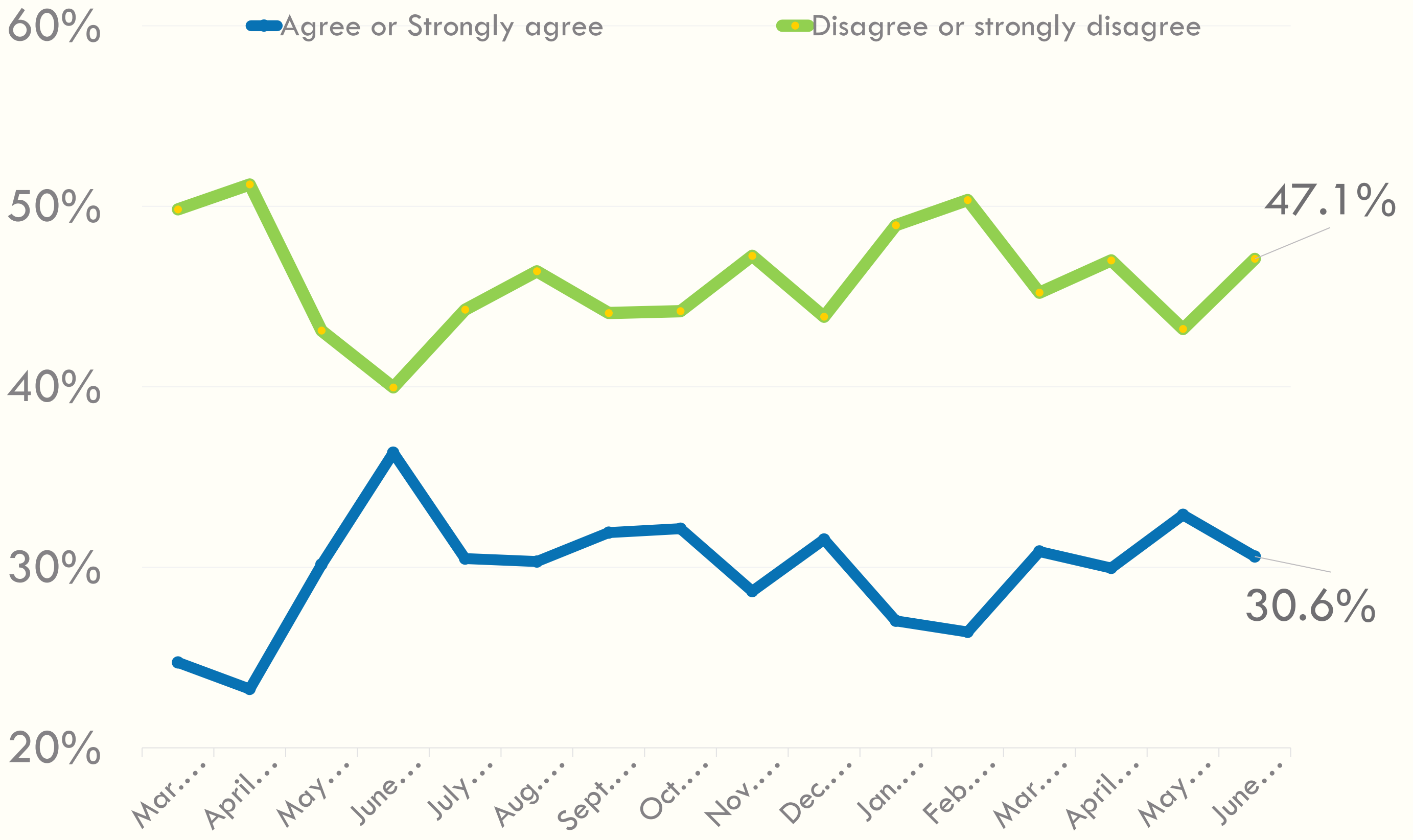
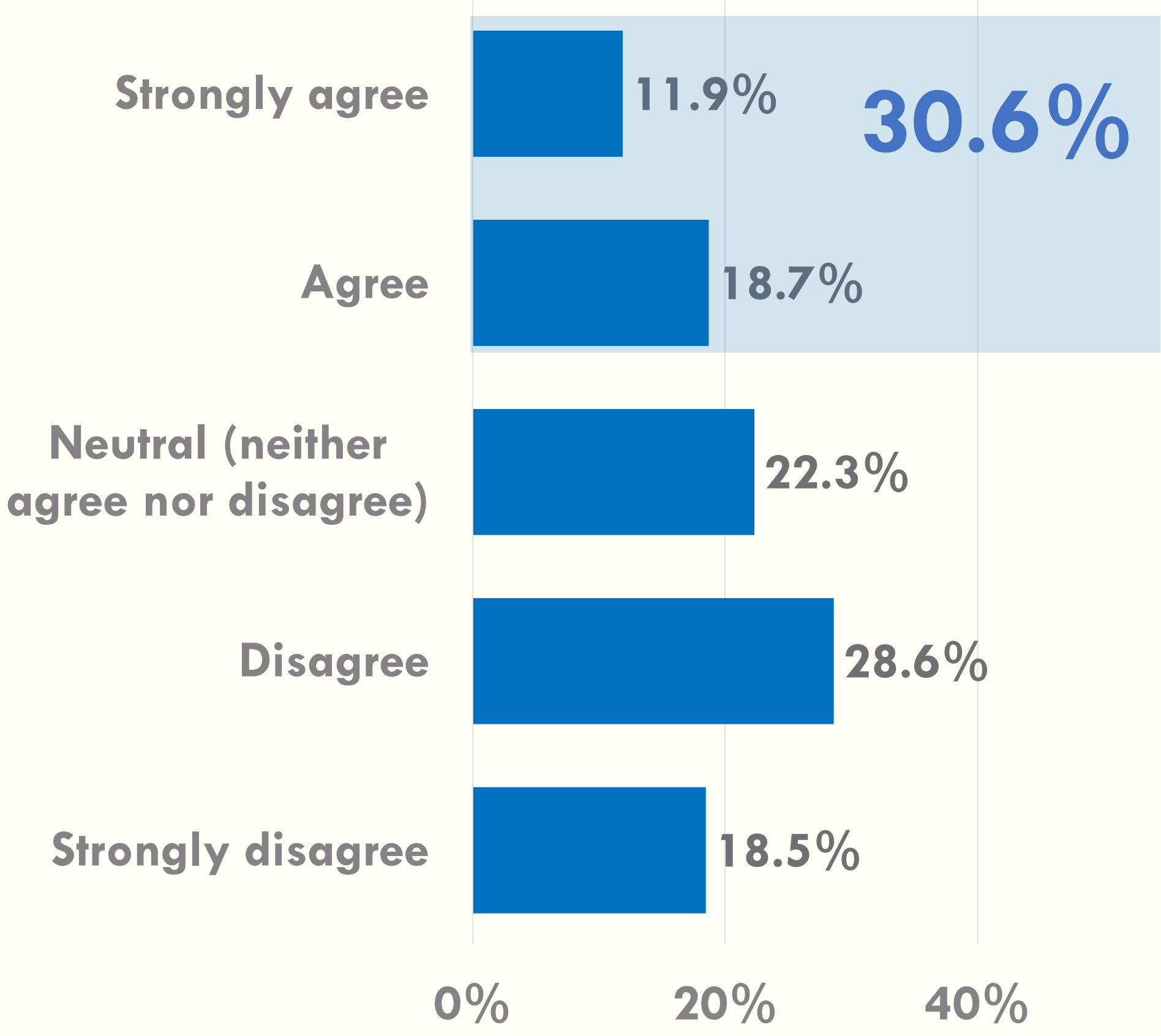


Statement: High travel prices have kept me from traveling in the past month.



(Base: All respondents, 4,011 completed surveys. Data collected June 17-21, 2023.)

Statement: Recent inflation in consumer prices has led me to cancel an upcoming trip.



(Base: All respondents, 4,011 completed surveys. Data collected June 17-21, 2023.)

TRAVEL SENTIMENT INDICES

A tool to better understand the big picture by bringing all these data points together.

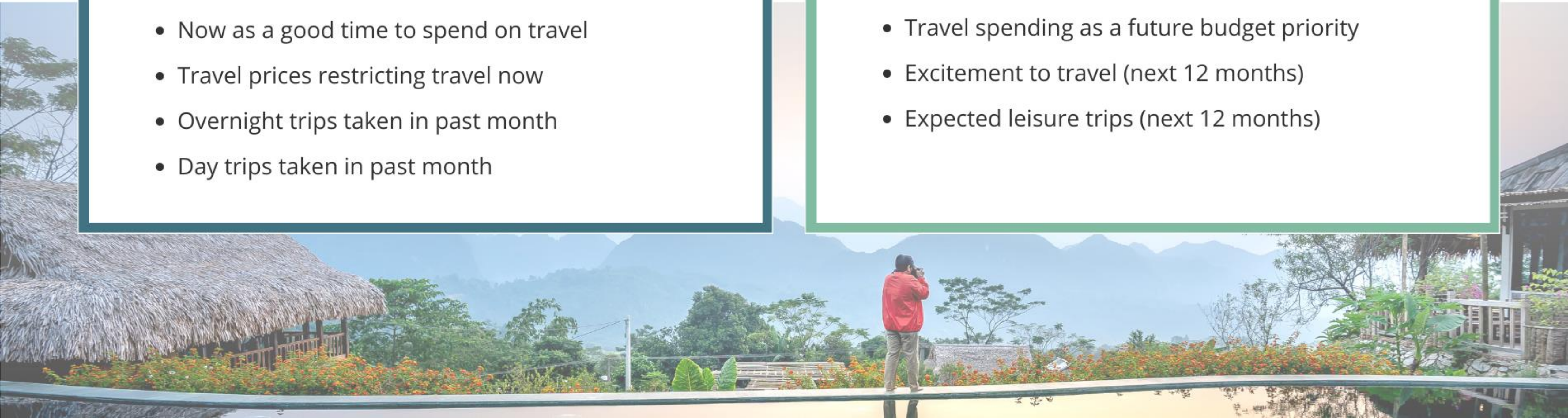
Index values are calculated by combining key questions.

Current Travel Sentiment Index:

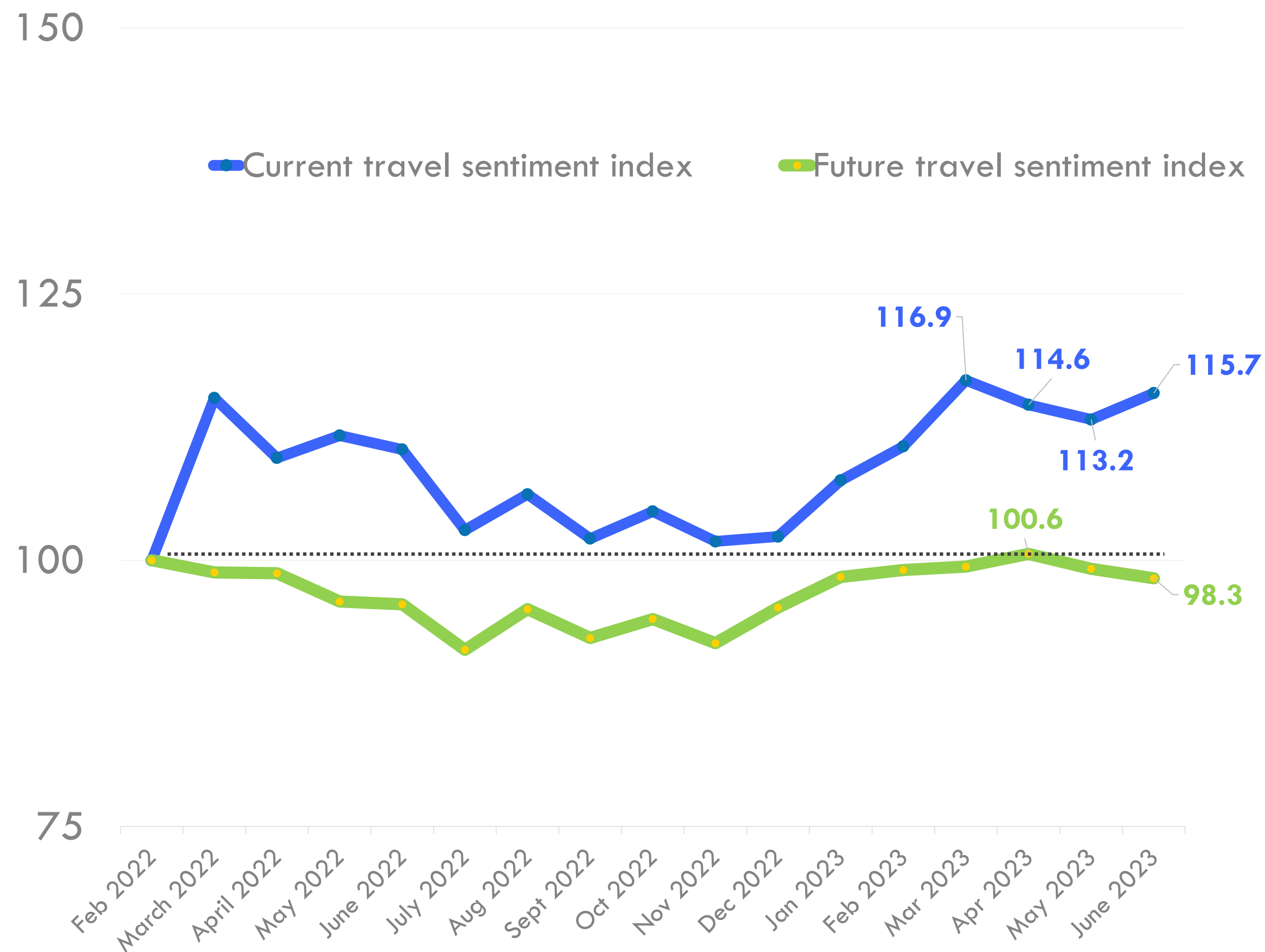
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

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)



TRAVEL SENTIMENT INDICES:

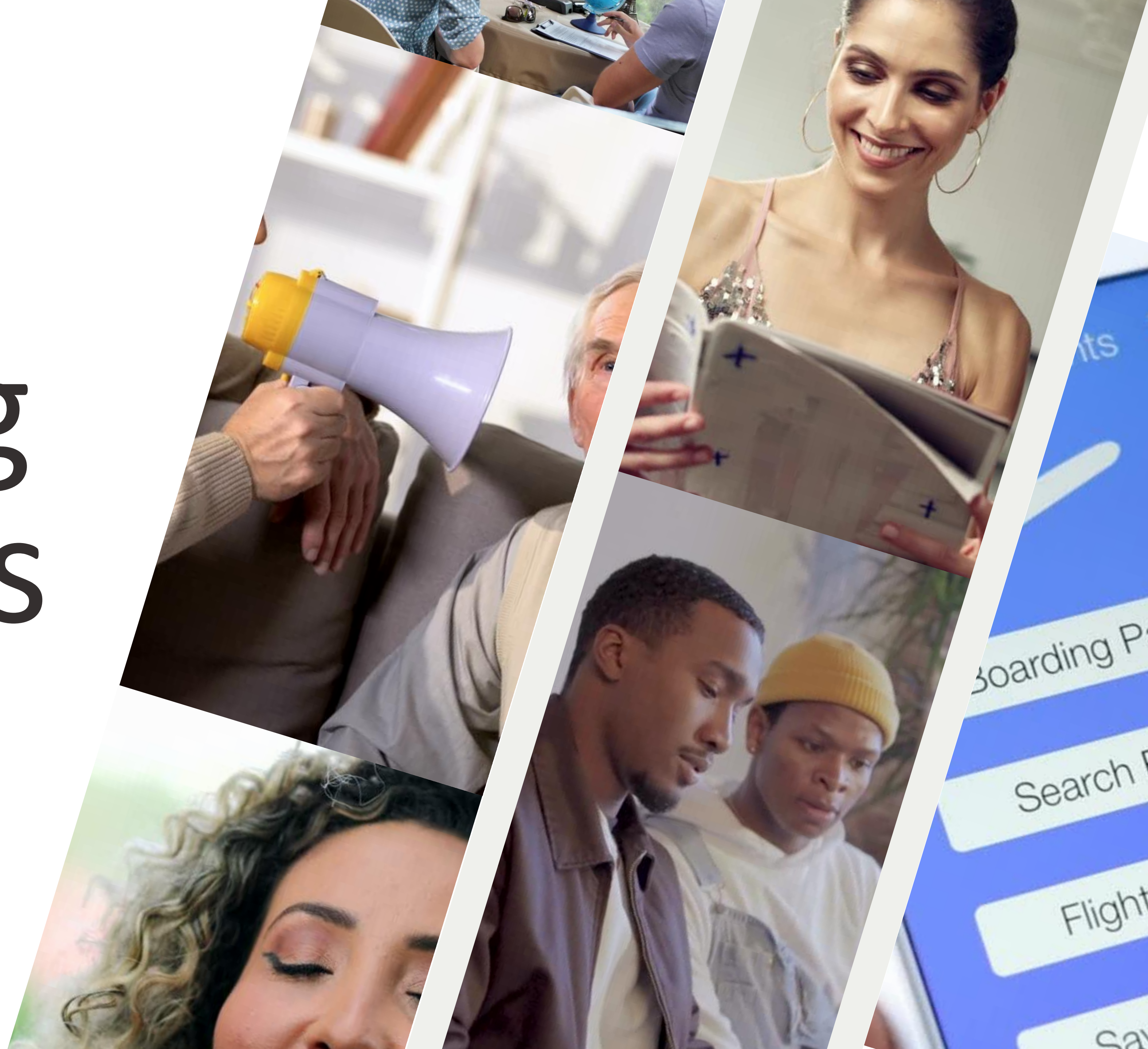


Note: These indices measure change in sentiment relative to Feb 2022.

- Current travel enthusiasm improved this month.
- Expectations for future travel is down very slightly again this month.

Travel Planning Activities

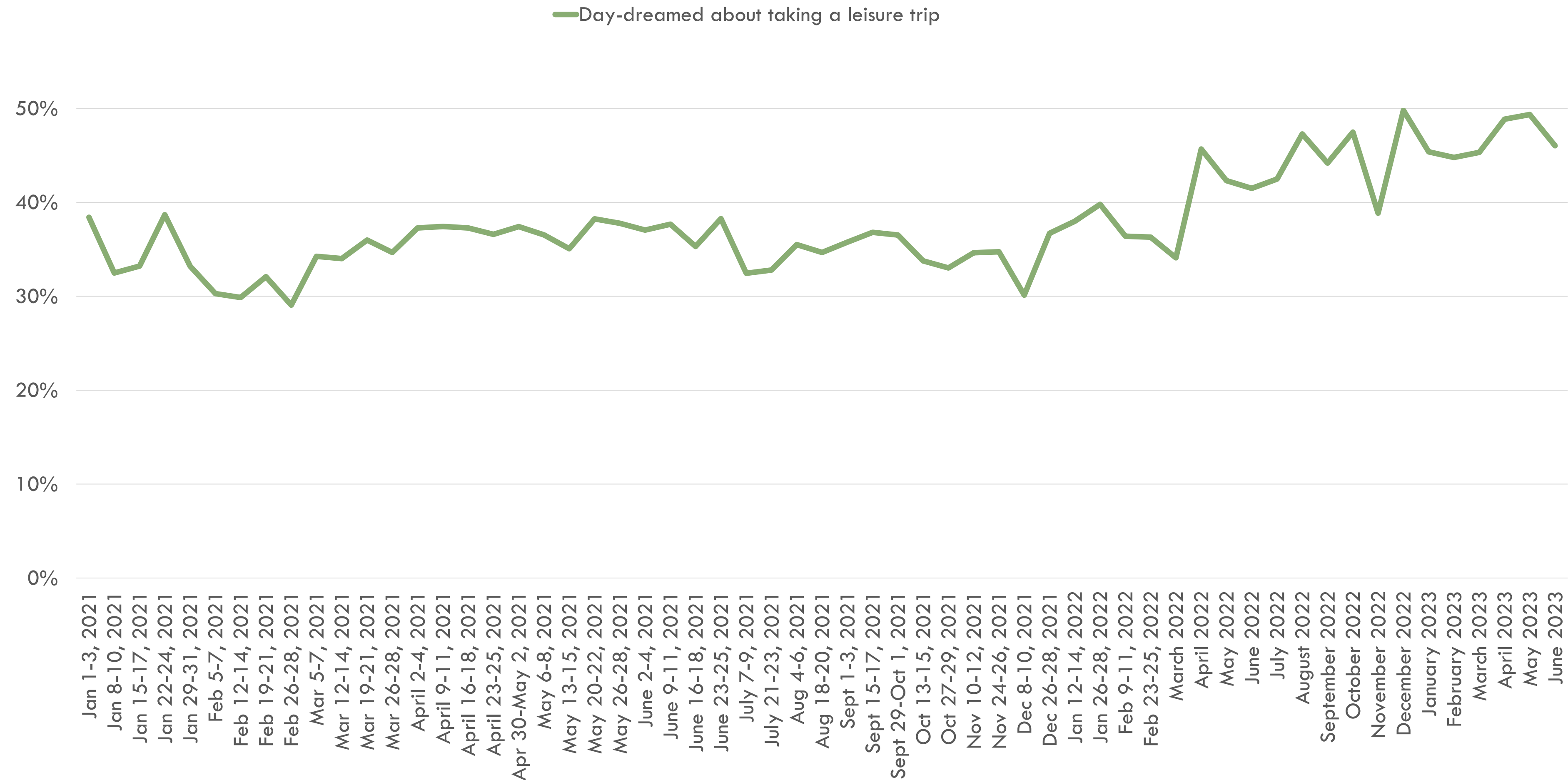
(Past Week)



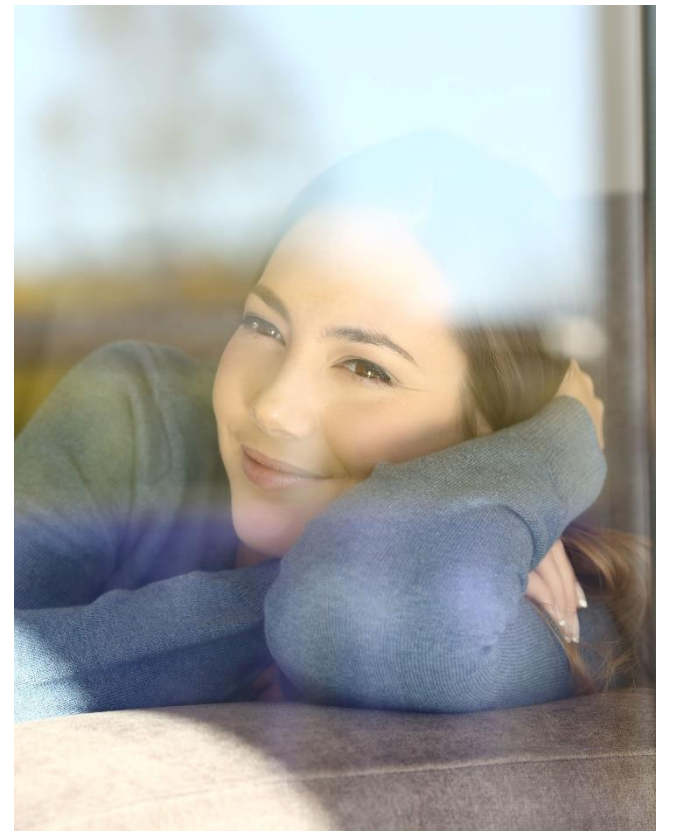
TRAVEL PLANNING IN THE PAST WEEK

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

In the PAST WEEK I have _____



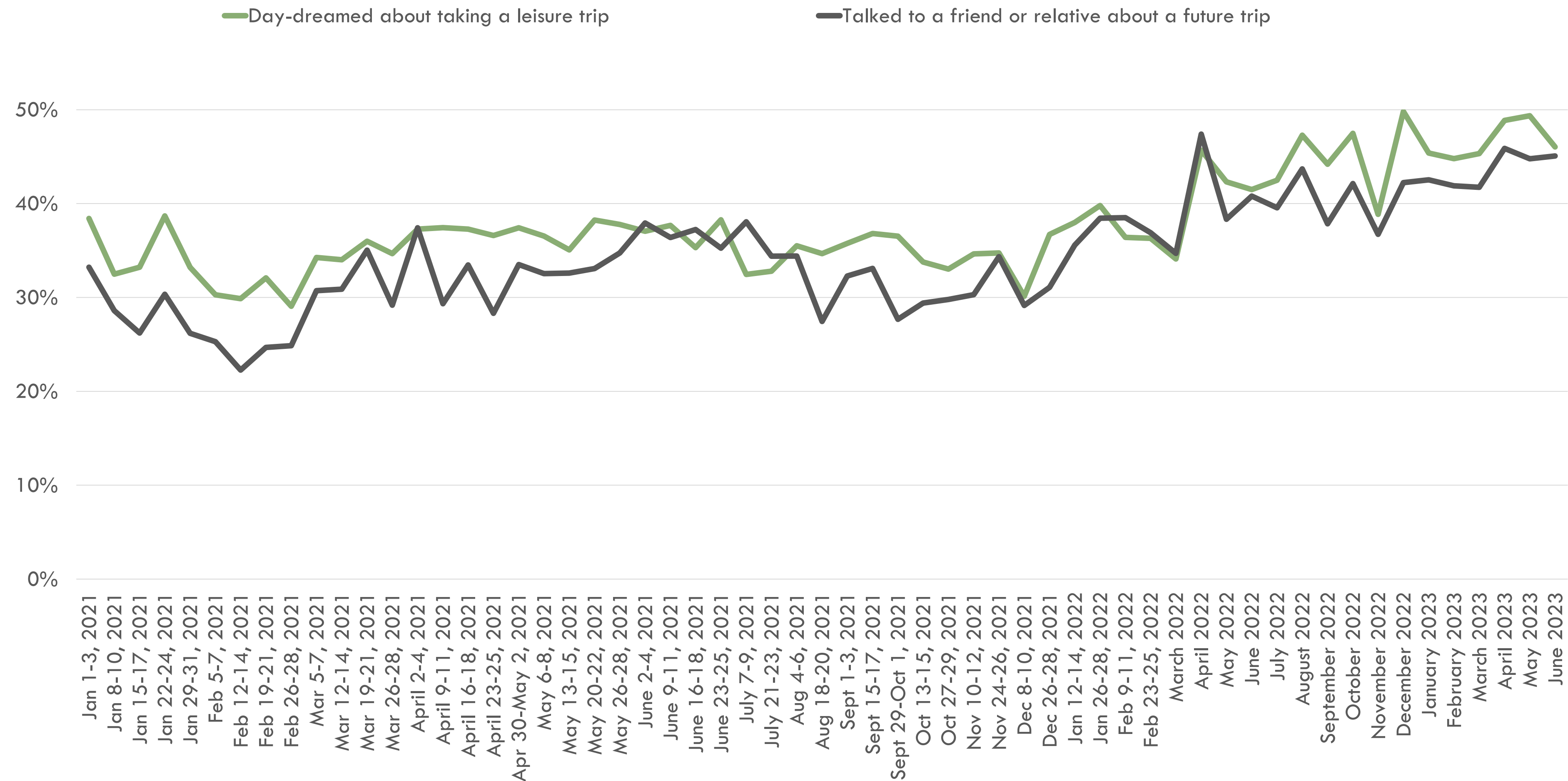
Day-dreamed about taking a leisure trip



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 _____



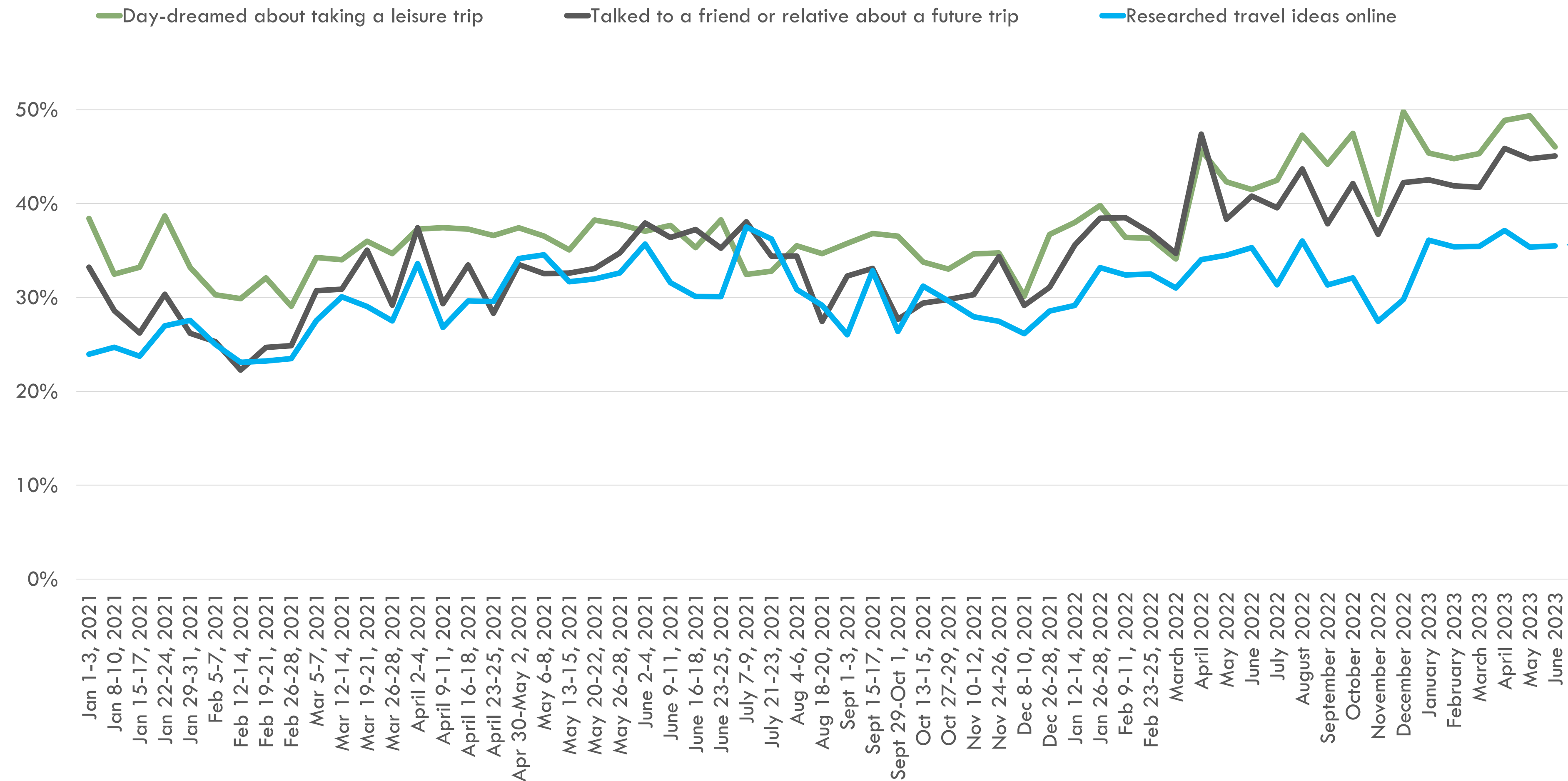
Talked to a friend about a future trip ←



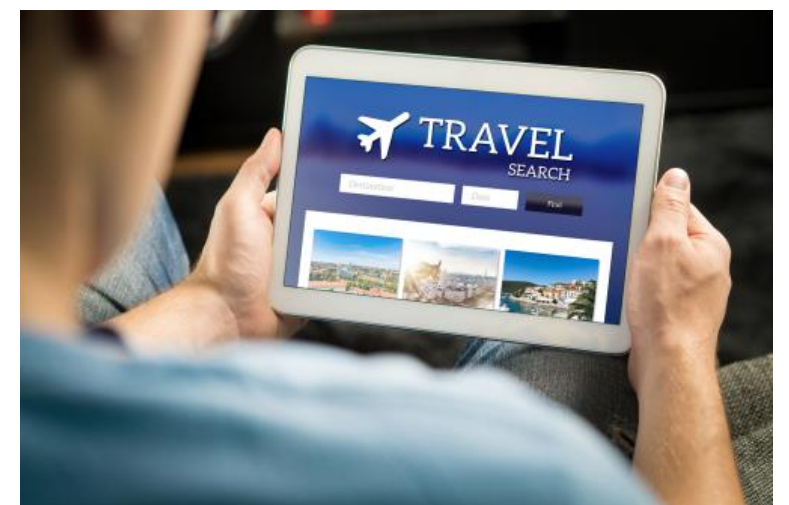
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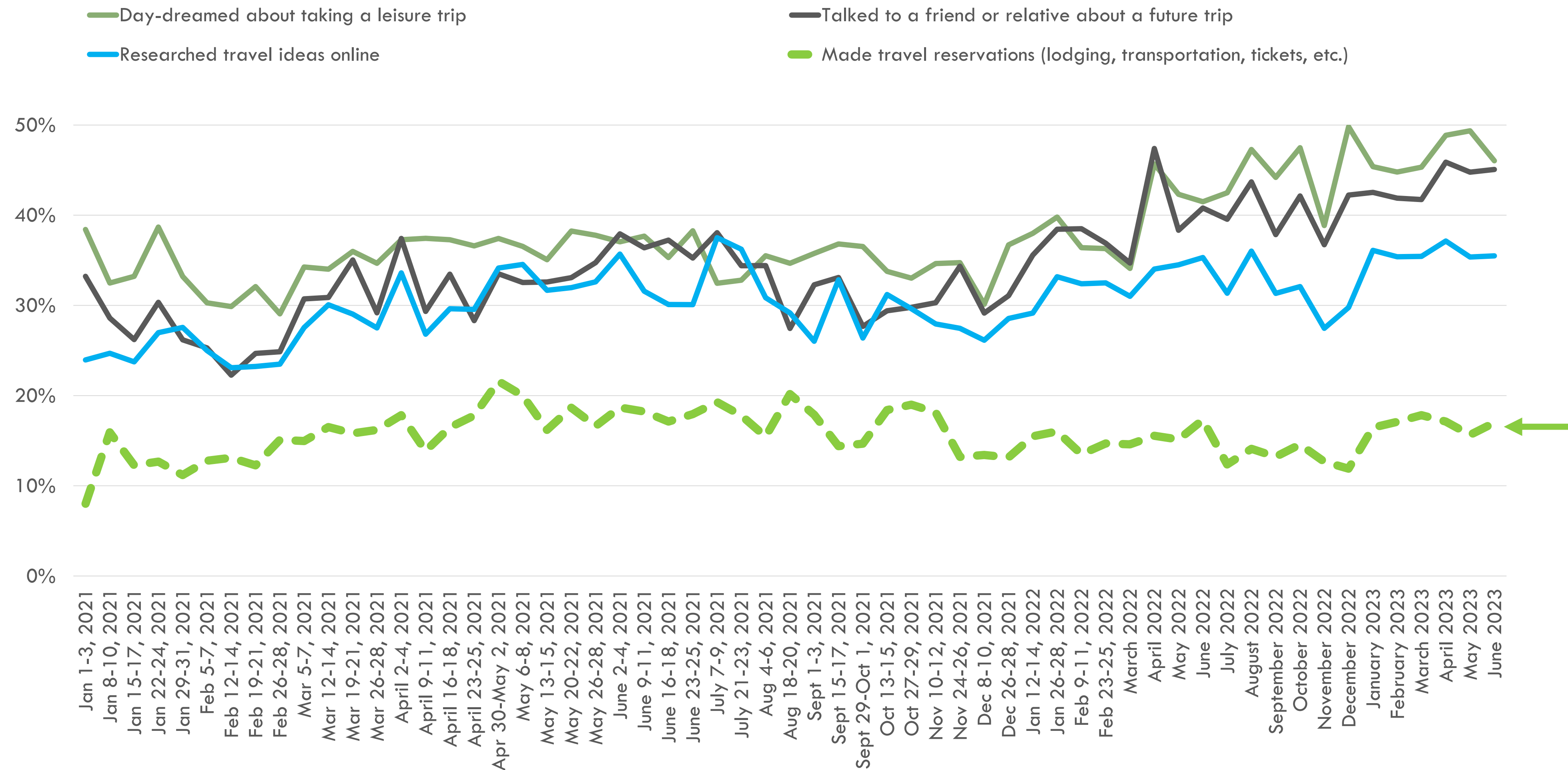
Researched Travel Ideas Online



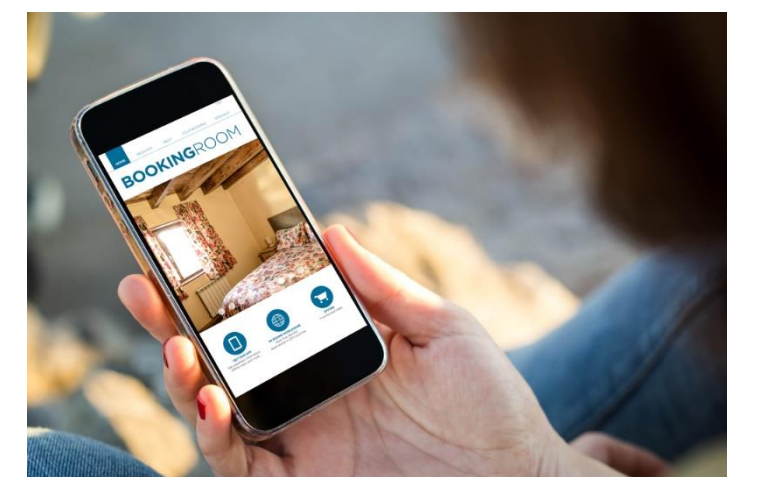
TRAVEL PLANNING IN THE PAST WEEK

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

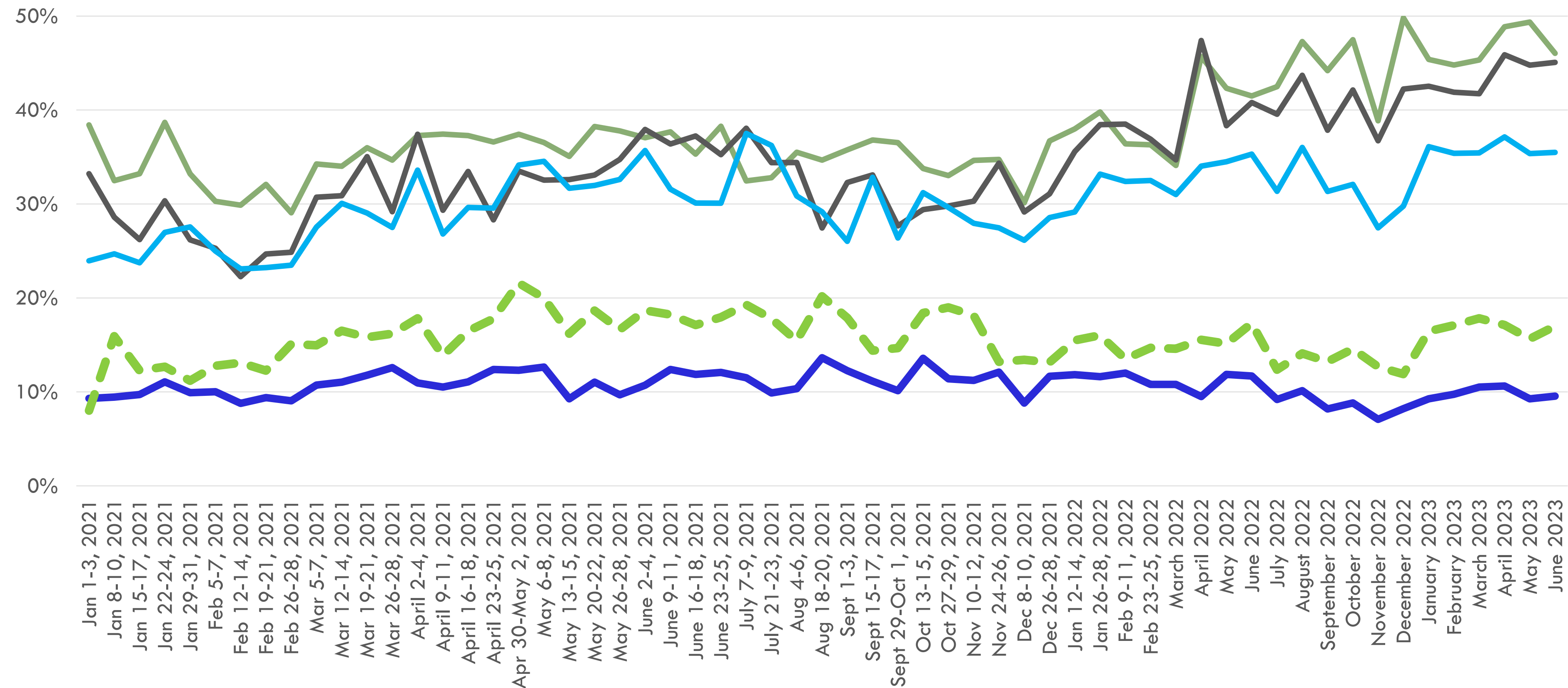


TRAVEL PLANNING IN THE PAST WEEK

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
- Researched travel ideas online
- Researched travel ideas offline (magazines, printed visitor guides, etc.)
- Talked to a friend or relative about a future trip
- Made travel reservations (lodging, transportation, tickets, etc.)



Researched Travel Ideas Offline

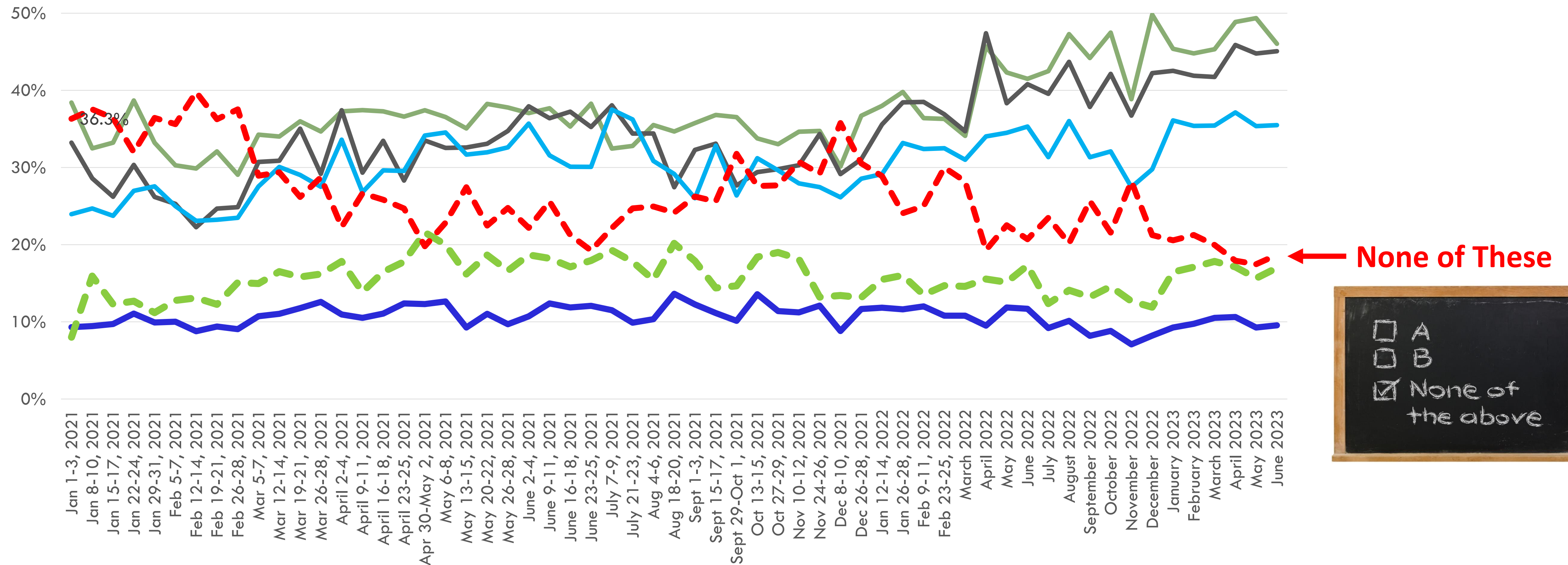


TRAVEL PLANNING IN THE PAST WEEK

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

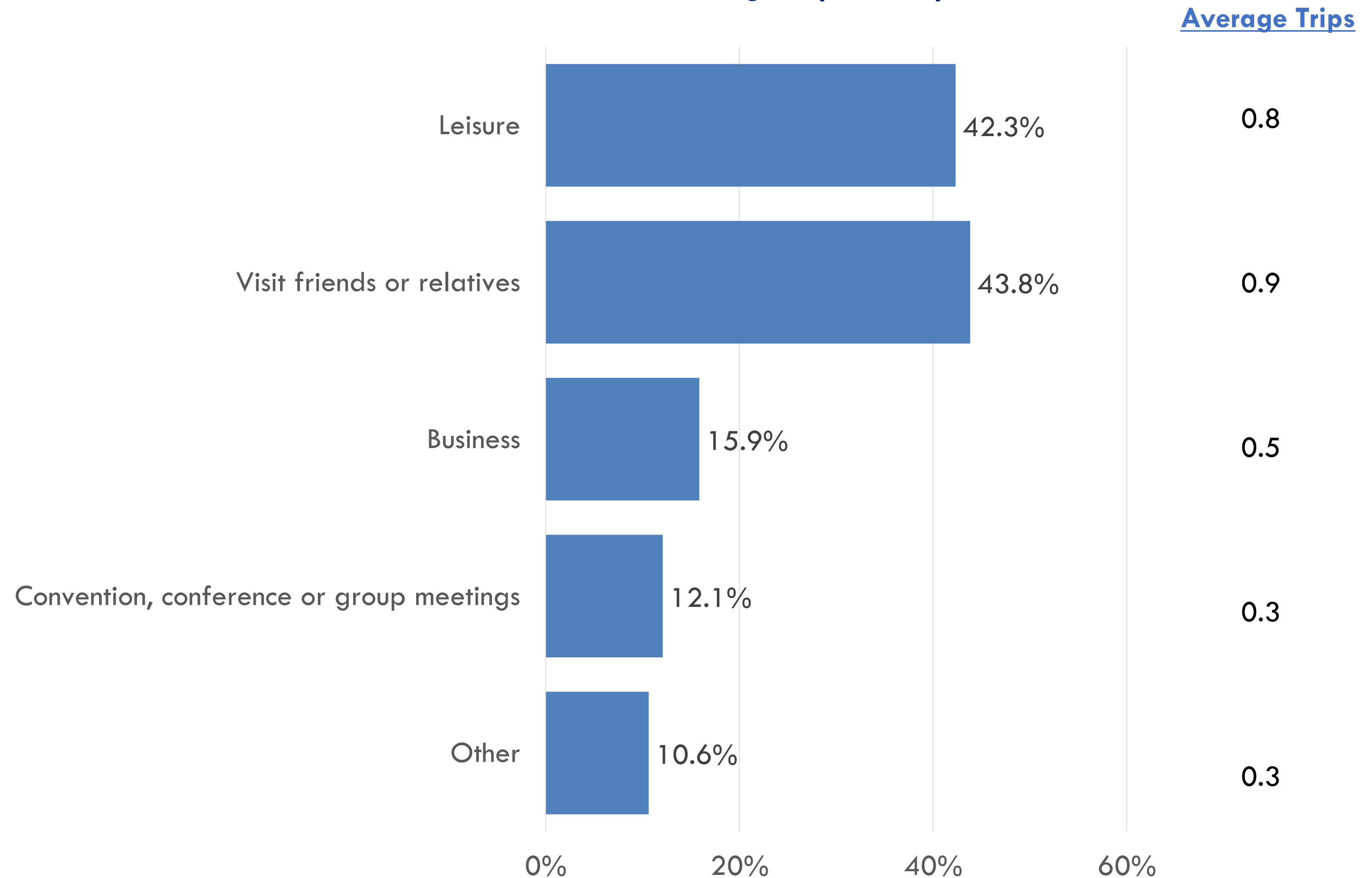


OVERNIGHT TRIPS IN THE PAST MONTH: BY TRIP TYPE

% who have taken 1 or more overnight trips in the past month

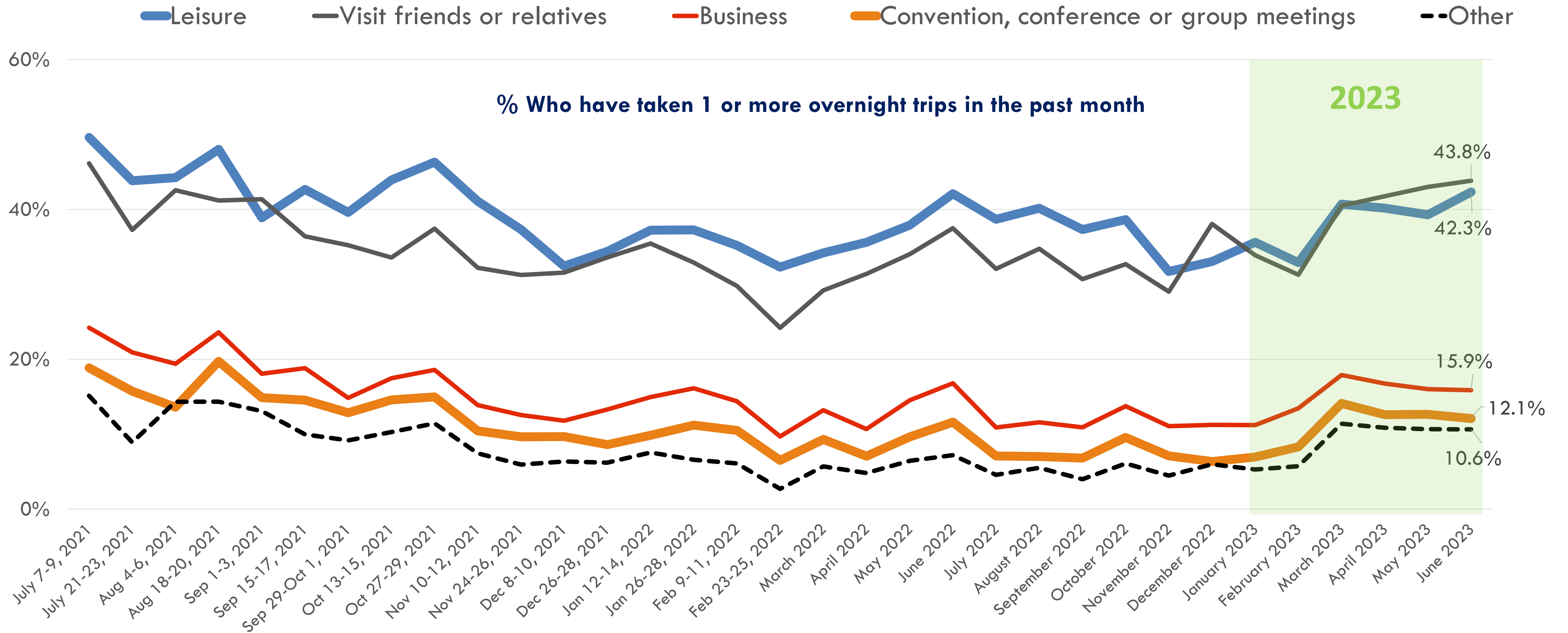
Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)

(Base: All respondents, 4,011 completed surveys. Data collected June 15-21, 2023.)



OVERNIGHT TRIPS IN THE PAST MONTH: BY TRIP TYPE

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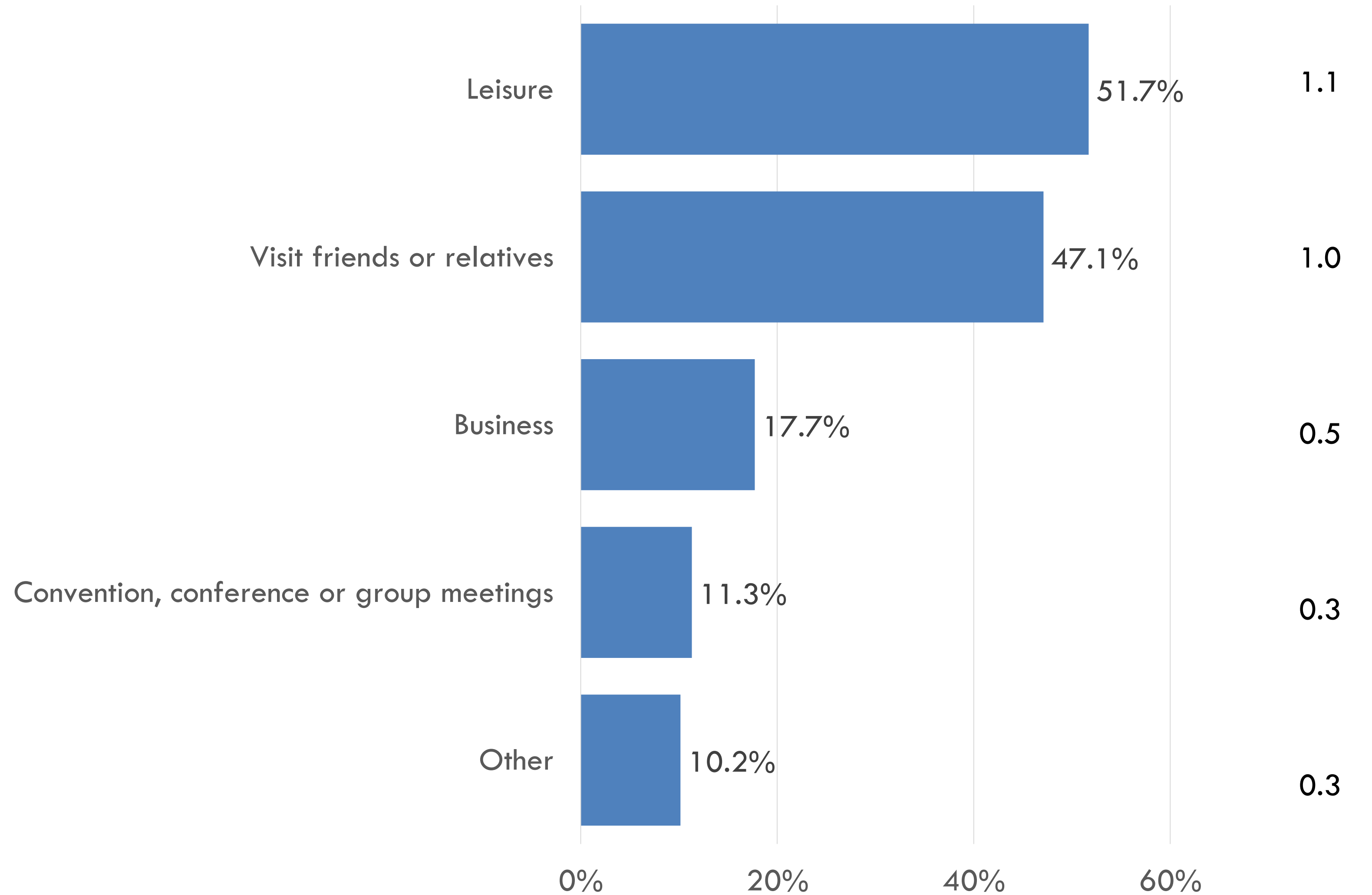
DAY TRIPS IN THE PAST MONTH: BY TRIP TYPE

% who have taken 1 or more day trips in the past month

Average Trips

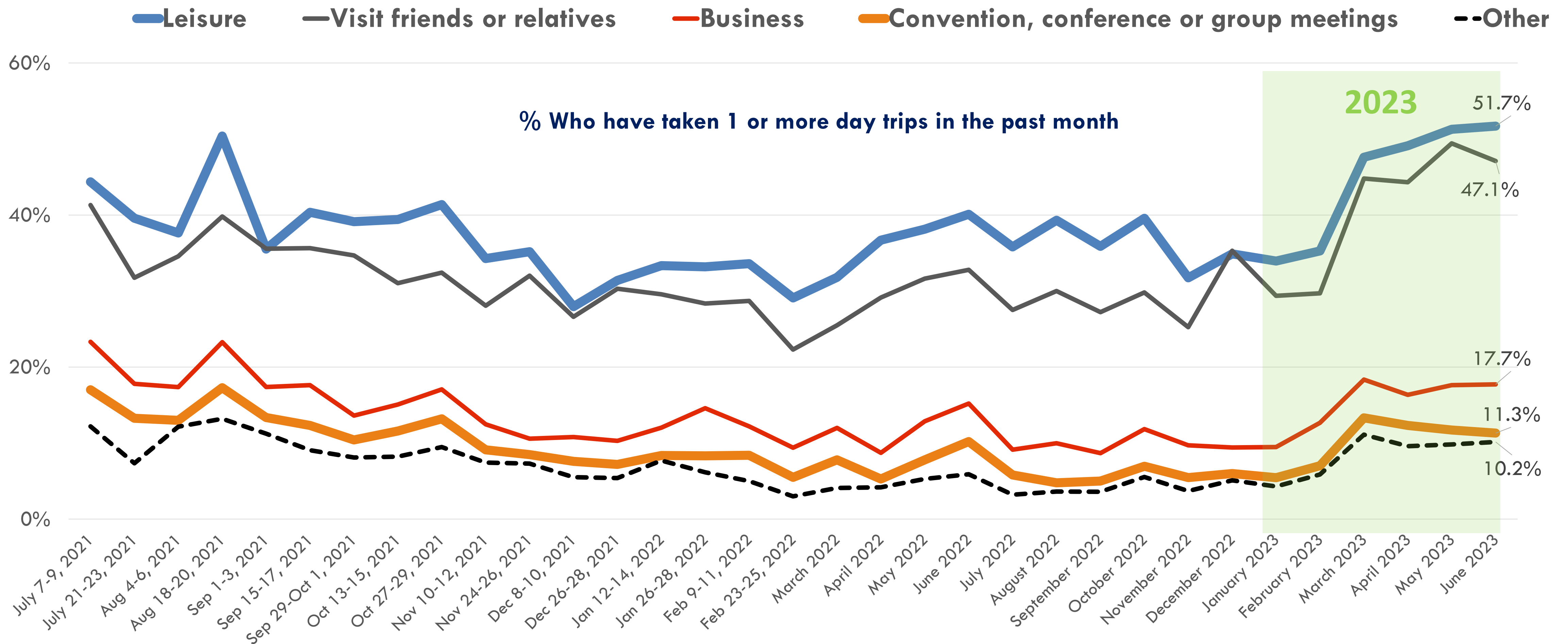
Question: How many DAY TRIPS (i.e., no overnight stay) of each type have you taken in the PAST MONTH?

(Base: All respondents, 4,011 completed surveys. Data collected June 15-21, 2023.)



DAY TRIPS IN THE PAST MONTH: BY TRIP TYPE

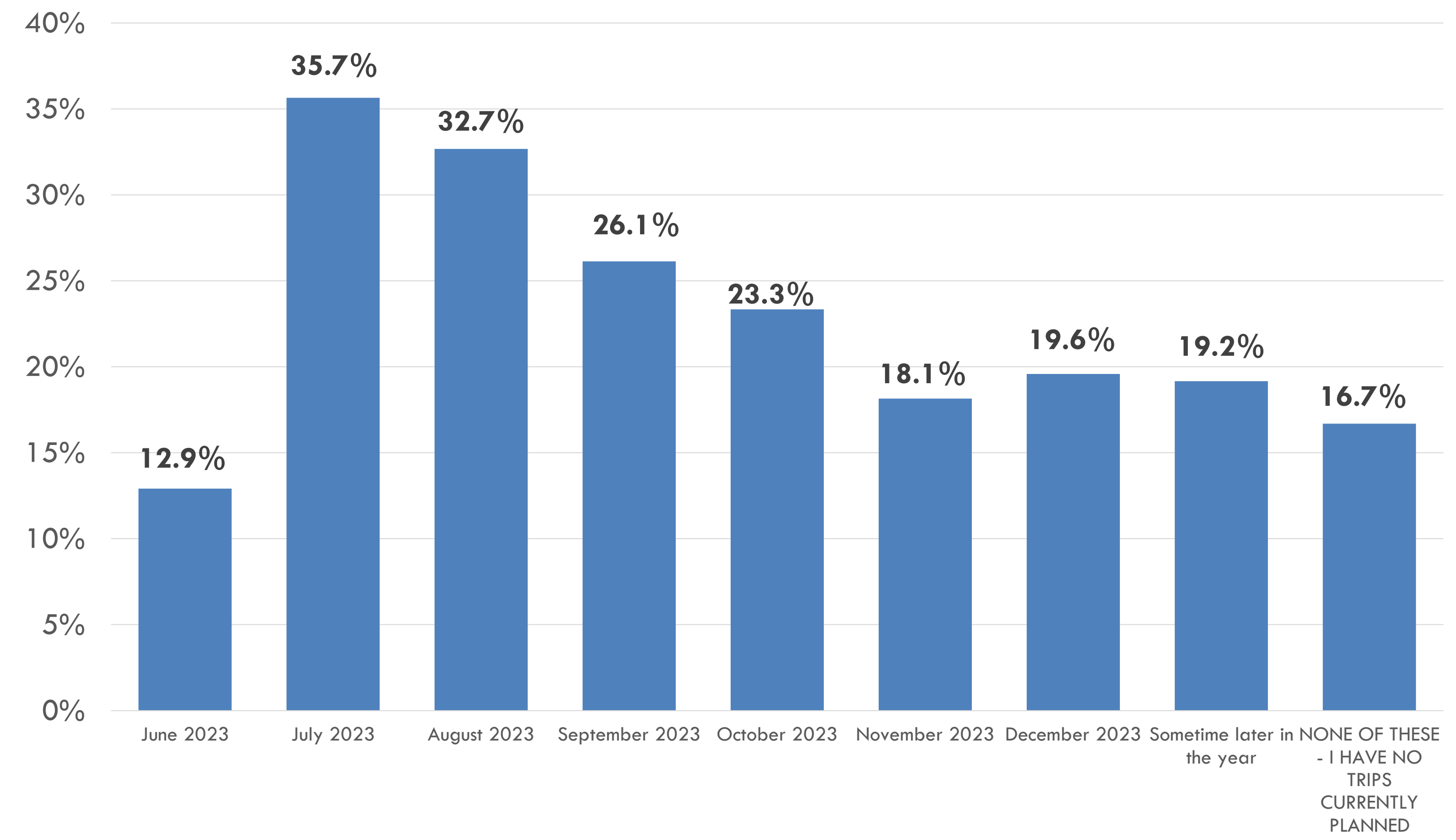
Question: How many DAY TRIPS (i.e., no overnight stay) of each type have you taken in the PAST MONTH?



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

MONTHS OF EXPECTED LEISURE TRIPS IN 2023

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



Audience Poll

In the past 6 months, which of these issues have you personally experienced while traveling?

- Over-crowded destinations**
- Excessive prices**
- Bad customer service**
- Flight delays or cancellations**
- None of these**

TRAVEL IN THE MEDIA



TRAVEL IN THE MEDIA

THE WALL STREET JOURNAL

Home World U.S. Politics Economy Business Tech Markets Opinion Books & Arts

LIFE & WORK | TRAVEL | CARRY ON

Face It, That \$6,000 Vacation Isn't Worth It Right Now

Vacationers scratching their travel itch this season are sending prices through the roof. Here's how some are making trade-offs.



By Dawn Gilbertson [Follow](#)

Updated May 24, 2023 12:01 am ET

412

Gift unlocked article

Capri Coffer socks away \$600 a month to help fund her travels. The Atlanta health-insurance account executive and her husband couldn't justify a family vacation to the Dominican Republic this summer, though, given what she calls "astronomical" plane ticket prices of \$800 each.

The price was too high for younger family members, even with Coffer defraying some of the costs.

YOUR MONEY BRIEFING

Summer Vacation: How to Avoid Skyrocketing Costs

06:46 1x

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Instead, the family of six will pile into a rented minivan come August and drive to Hilton Head Island, S.C., where Coffer booked a beach house for \$650 a night. Her budget excluding food for the two-night trip is about \$1,600, compared with the \$6,000 price she was quoted for a three-night trip to Punta Cana.

"That way, everyone can still be together and we can still have that family time," she says.

The New York Times

Going to Europe This Summer? You're Not Alone.

After three years of pandemic restrictions, travelers are flocking to Europe in record numbers, despite high airfares, limited accommodations and crowded sites. Here's what you might encounter.

Between the time that Aiden Judson and his wife, Laura, picked Sicily as their honeymoon destination and their actual trip in early June, something significant happened: the second season of "The White Lotus."

The New York couple had imagined a quiet getaway, hiking across the nearby Aeolian Islands and plunging into the crystal turquoise waters of the Tyrrhenian Sea, far from crowded Italian beach destinations like Capri and the Amalfi coast.

But then HBO released the second season of its hit show, set mainly in [San Domenico Palace](#), a Four Seasons hotel and former Dominican monastery in the cliff-top town of Taormina. While the luxury hotel may be out of reach for tourists on a budget, the show's idyllic Sicilian setting made the Italian island one of the most sought-after destinations in 2023.

"When we watched the show, we were so excited, like 'wow, that's going to be us,' and didn't realize that it would mean everyone and their mom would be going to Sicily this summer," said Mr. Judson, 37, who returned from the island earlier this month. "It was still stunning and we had some special moments, but it was crazy busy with loud and sweaty tourists packed into narrow streets. It made it difficult to feel the Italian charm."

TRAVEL IN THE MEDIA



The screenshot shows the top portion of a news article on the NBC News website. The header includes the NBC News logo, the article title "Summer travel season off to rough start amid widespread flight delays", and a sub-headline "There's little relief in sight as thousands of flights have been delayed or canceled in recent days due to inclement weather and staffing shortages." The background of the header is dark blue with white text.

June 28, 2023, 11:14 AM PDT

By Rob Wile

The feared repeat of last year's summer travel woes [began to materialize this week](#), with thousands of flights delayed or canceled amid inclement weather and staffing shortages.

The troubles began last weekend, with nearly 2,000 U.S. flights canceled, according to FlightAware. Disruptions continued into Monday, when more than 11,000 U.S. flights were delayed or canceled. At least 7,300 were affected Tuesday.

By Wednesday, the delays and cancellations had begun to level off to about 2,000 U.S. flights, according to FlightAware.

Why your dream summer vacation may be a travel nightmare

- Several federal agencies are warning of potential travel headaches
- TSA predicts a record demand at security screening stations this summer
- U.S. passport backlogs are at their worst in years

Evan Lambert, Stephanie Haines

Updated: APR 21, 2023 / 10:30 AM CDT

WASHINGTON ([NewsNation](#)) — A unique blend of factors are conspiring to cause potential turbulence for flyers this summer travel season.

Airlines, the Federal Aviation Administration ([FAA](#)), Transportation Security Administration ([TSA](#)) and State Department have all indicated early signals to vacationers that they might need extra patience reaching their destinations.

A shortage of air traffic controllers has caused airlines to cut summer flight schedules, and the TSA predicts there will be a record demand at screening stations.

TRAVEL IN THE MEDIA



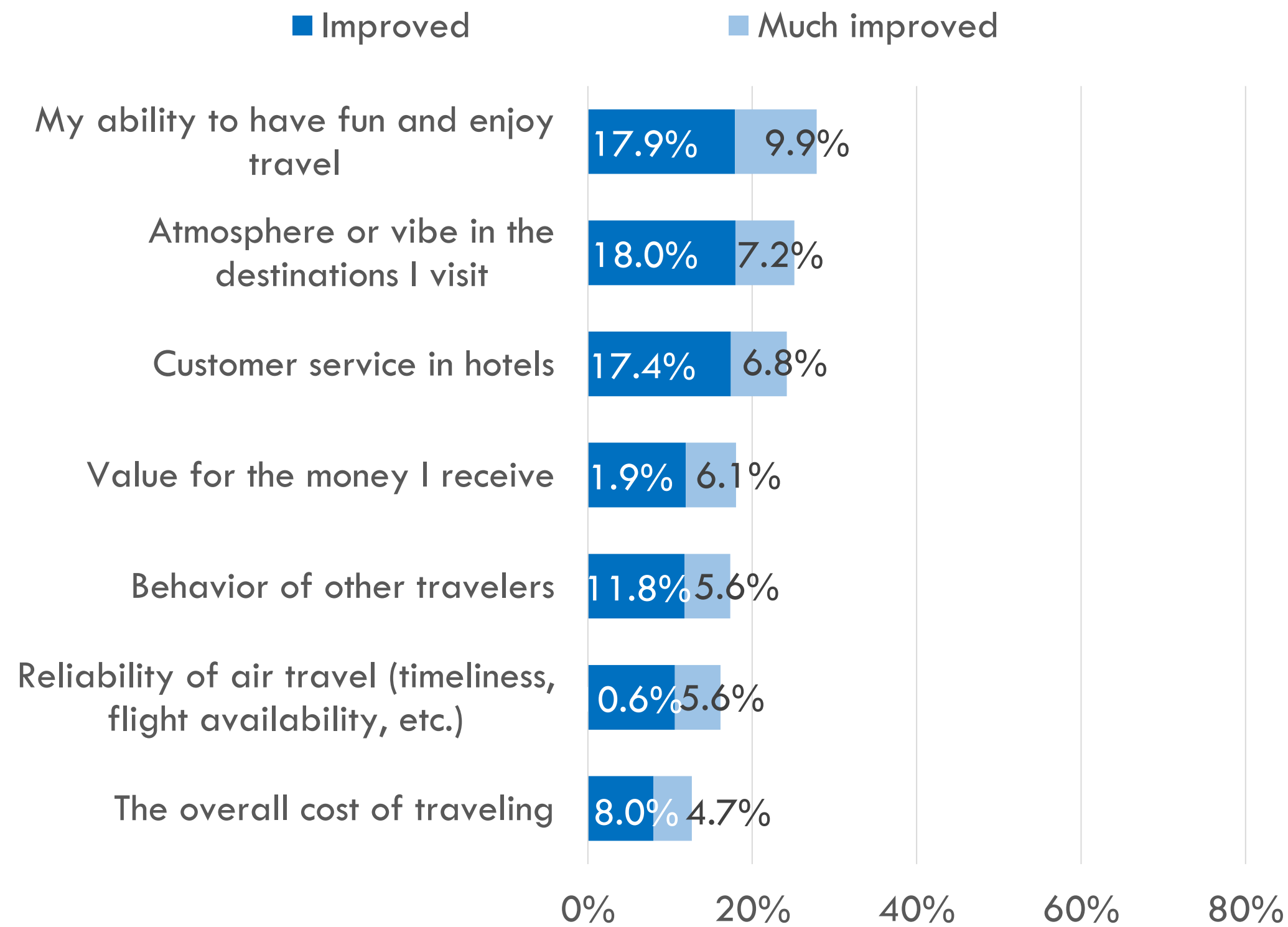
COMPARED TO BEFORE THE PANDEMIC, HOW WOULD YOU RATE EACH OF THE FOLLOWING ASPECTS OF TRAVELING *RIGHT NOW?*



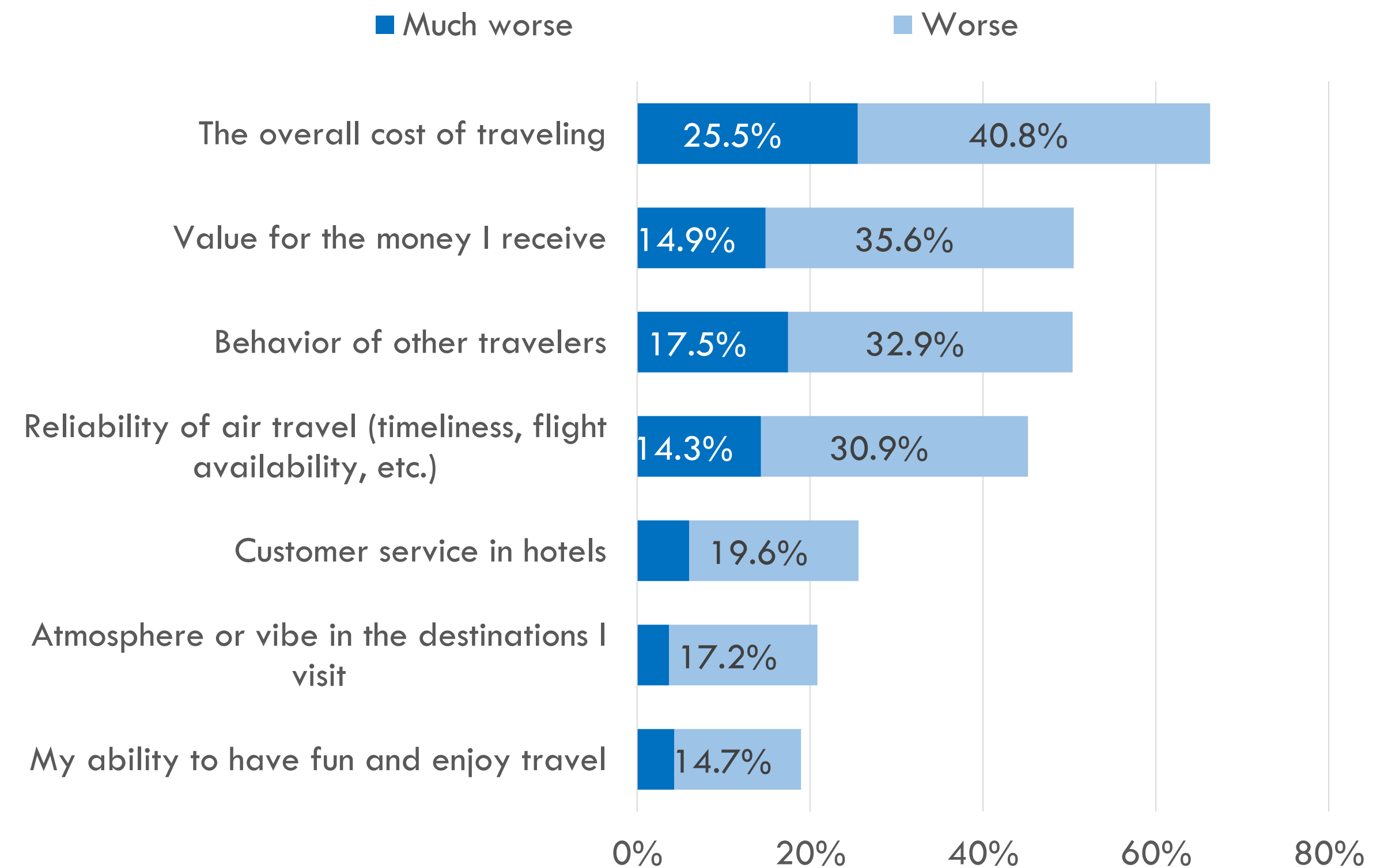
HOW HAS THE TRAVEL EXPERIENCE CHANGED?

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

The Good



The Bad





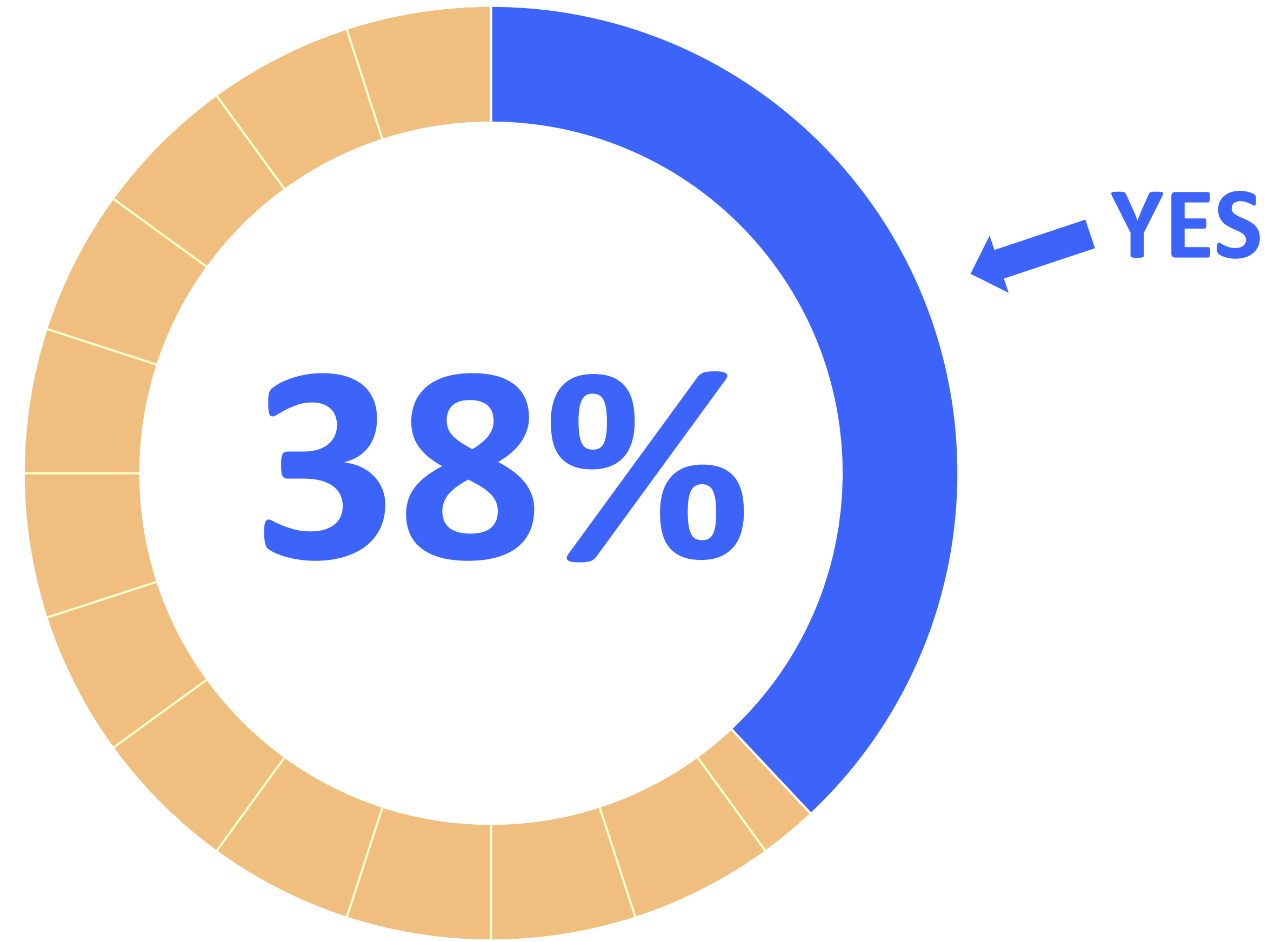
Sticker Shock

is the surprise and dismay a traveler might experience on being informed of a product or service's unexpectedly high price.



Question:

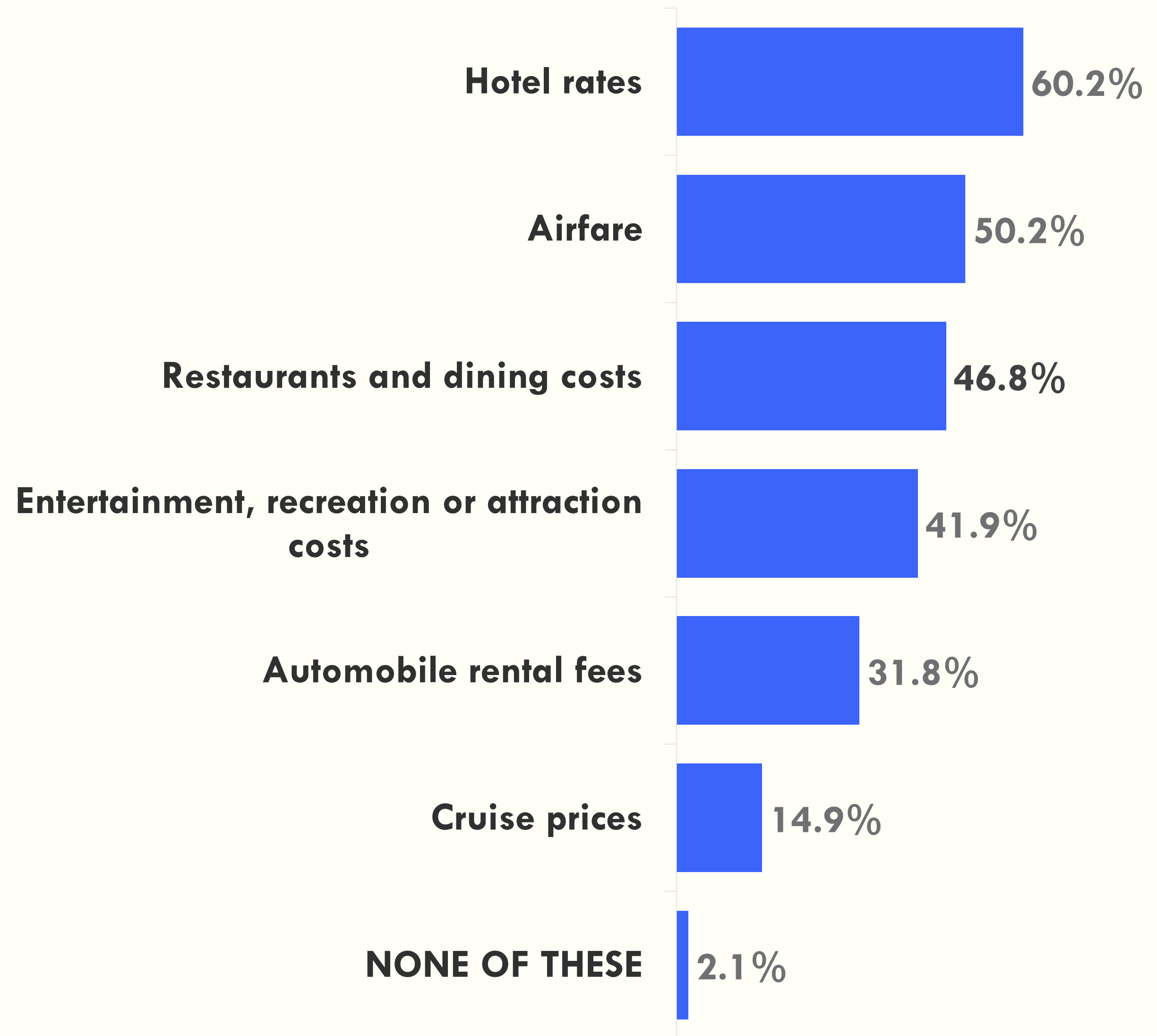
Thinking of the last time you were planning a trip (i.e., prior to leaving home), did you experience any sticker shock?



Question:

For which of the following did you experience sticker shock?

(Select all that apply)



(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%

Increased my overall budget for the trip

27.7%

Chose to visit a less expensive destination(s)

25.8%

Cancelled my travel plans entirely

14.8%

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.)

Have Fun

1

Save Money

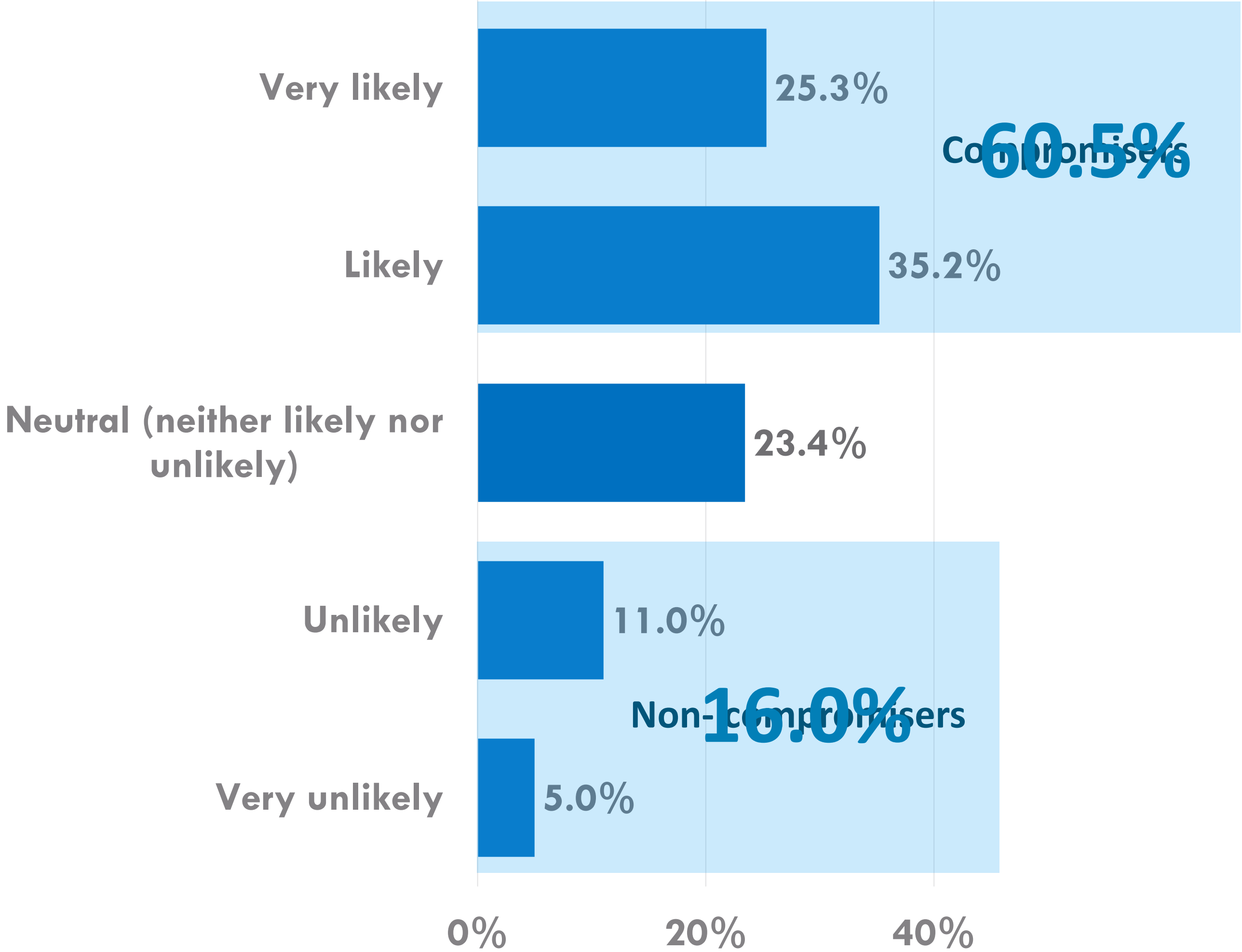
2

COMPROMISE



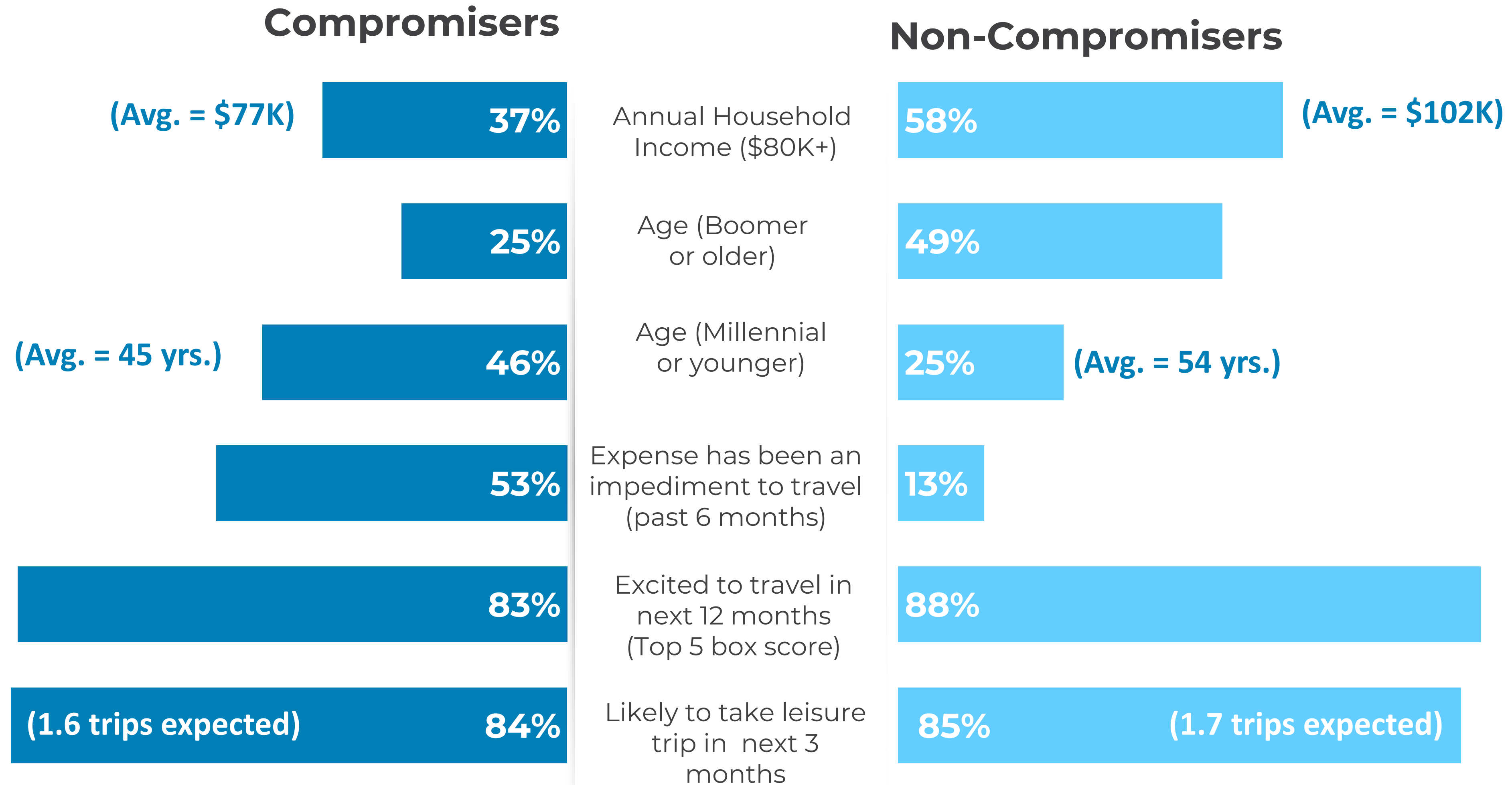
Question: In the **NEXT THREE (3) MONTHS**, how likely will you to be to **compromise aspects of your travel experience in order to save money?** (Select one to complete the sentence)

I will be _____ to **compromise aspects of my travel experience to save money.**



Who Are the Compromisers?

(60.5% of All Travelers)



Pop Quiz

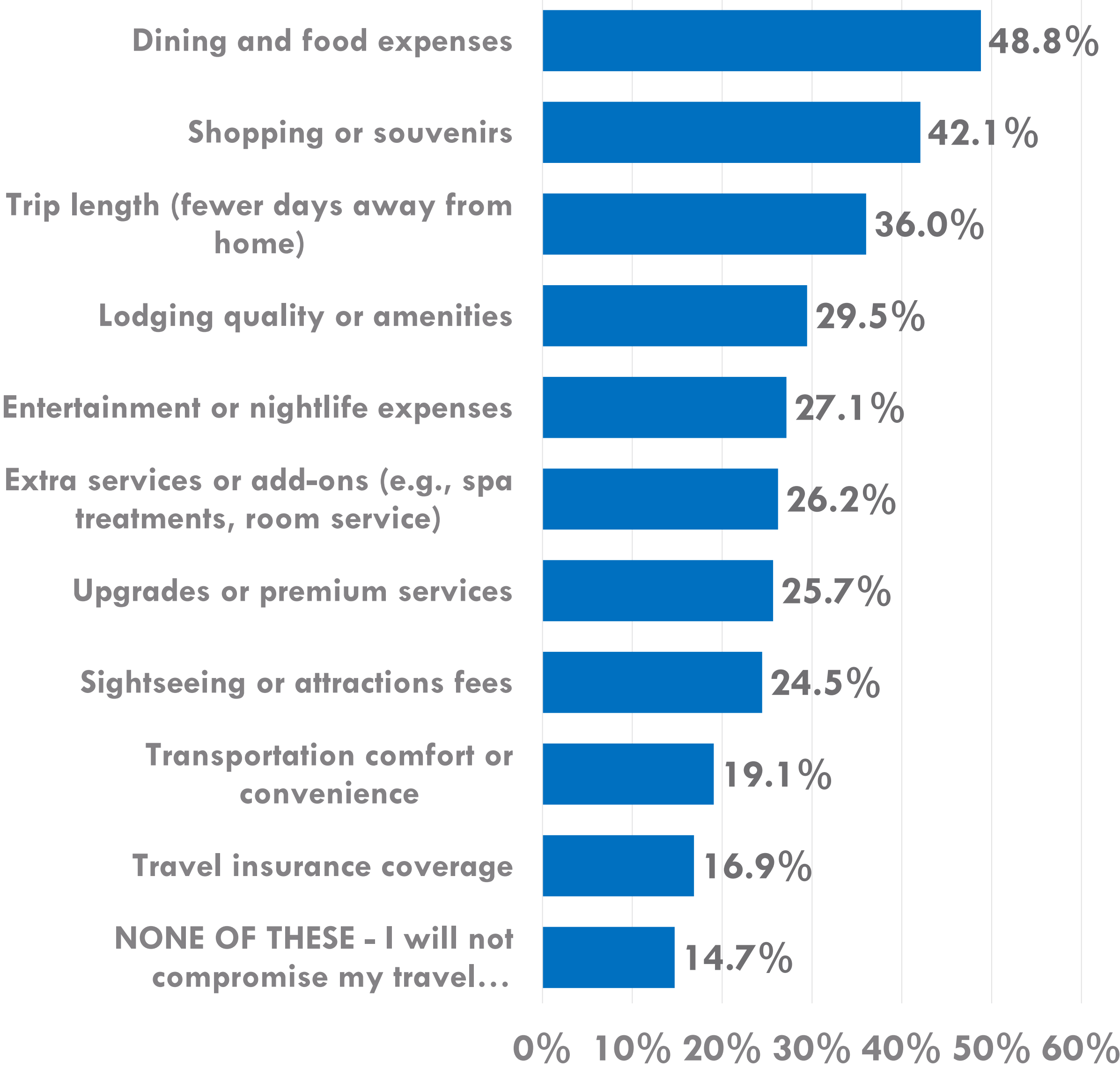
Which will travelers be most likely to compromise on?

Question: In the NEXT THREE (3) MONTHS when attempting to save money on travel, which of these aspects (if any) will you be likely to compromise on?

- Travel insurance coverage
- Transportation comfort or convenience
- Lodging quality or amenities
- Sightseeing or attractions fees
- Upgrades or premium services
- Dining and food expenses
- Extra services or add-ons (e.g., spa treatments, room service)
- Entertainment or nightlife expenses
- Trip length (fewer days away from home)
- Shopping or souvenirs

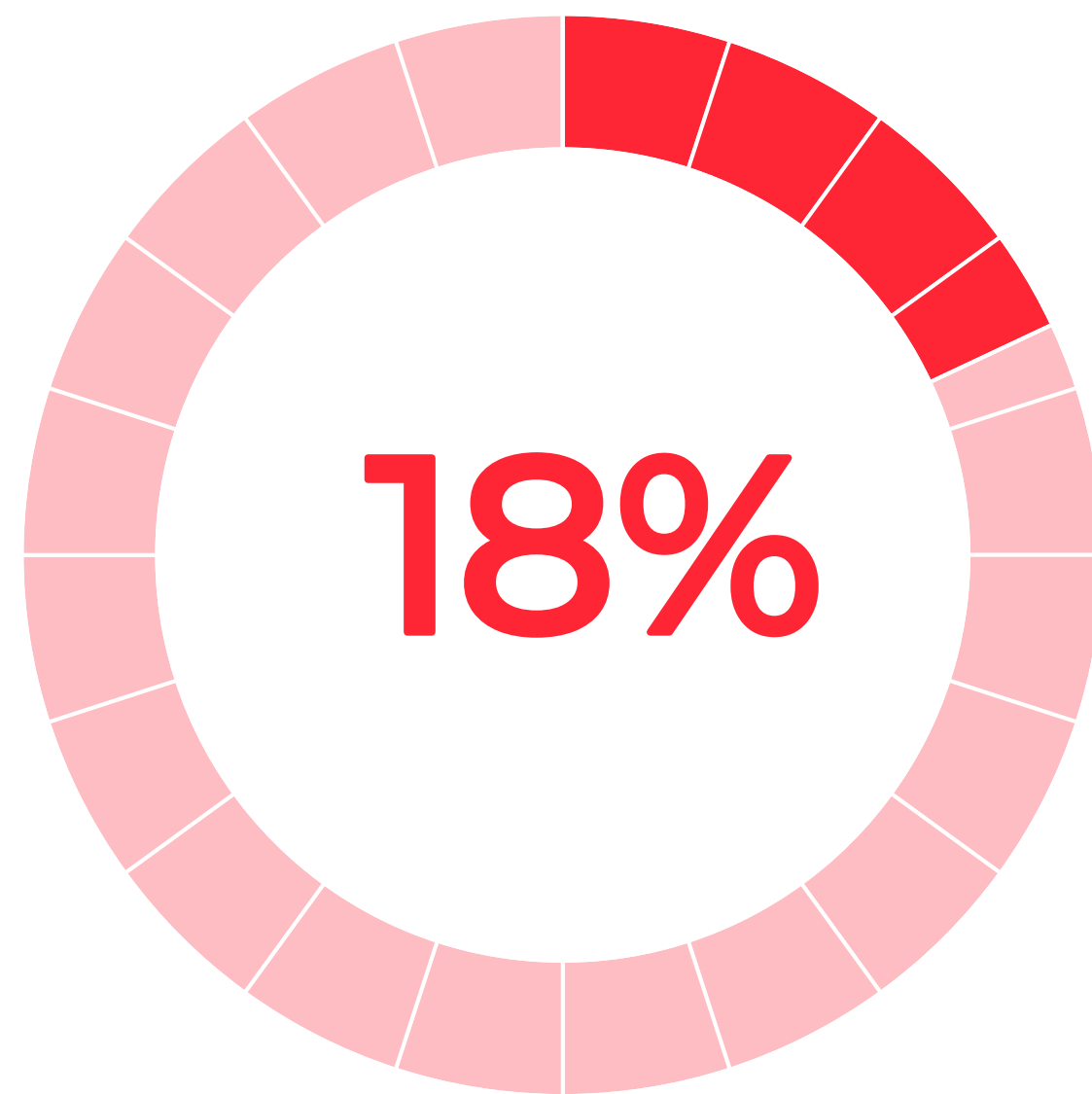
Question: In the NEXT THREE (3) MONTHS when attempting to save money on travel, which of these aspects (if any) will you be likely to compromise on?

I will likely compromise on _____ to save money



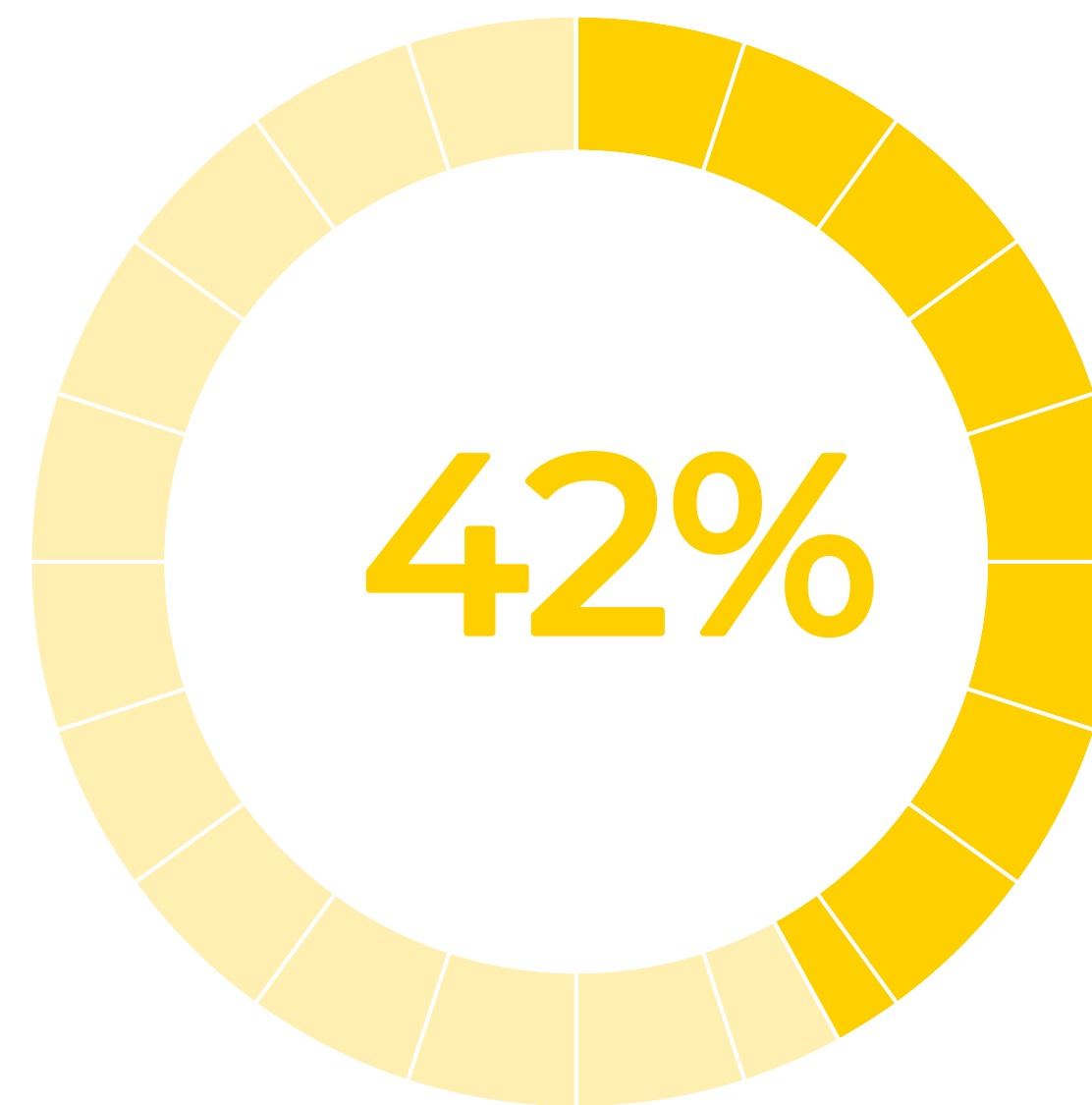
How Much More Likely Are Compromisers To Do Each?

Identify as a “Foodie”



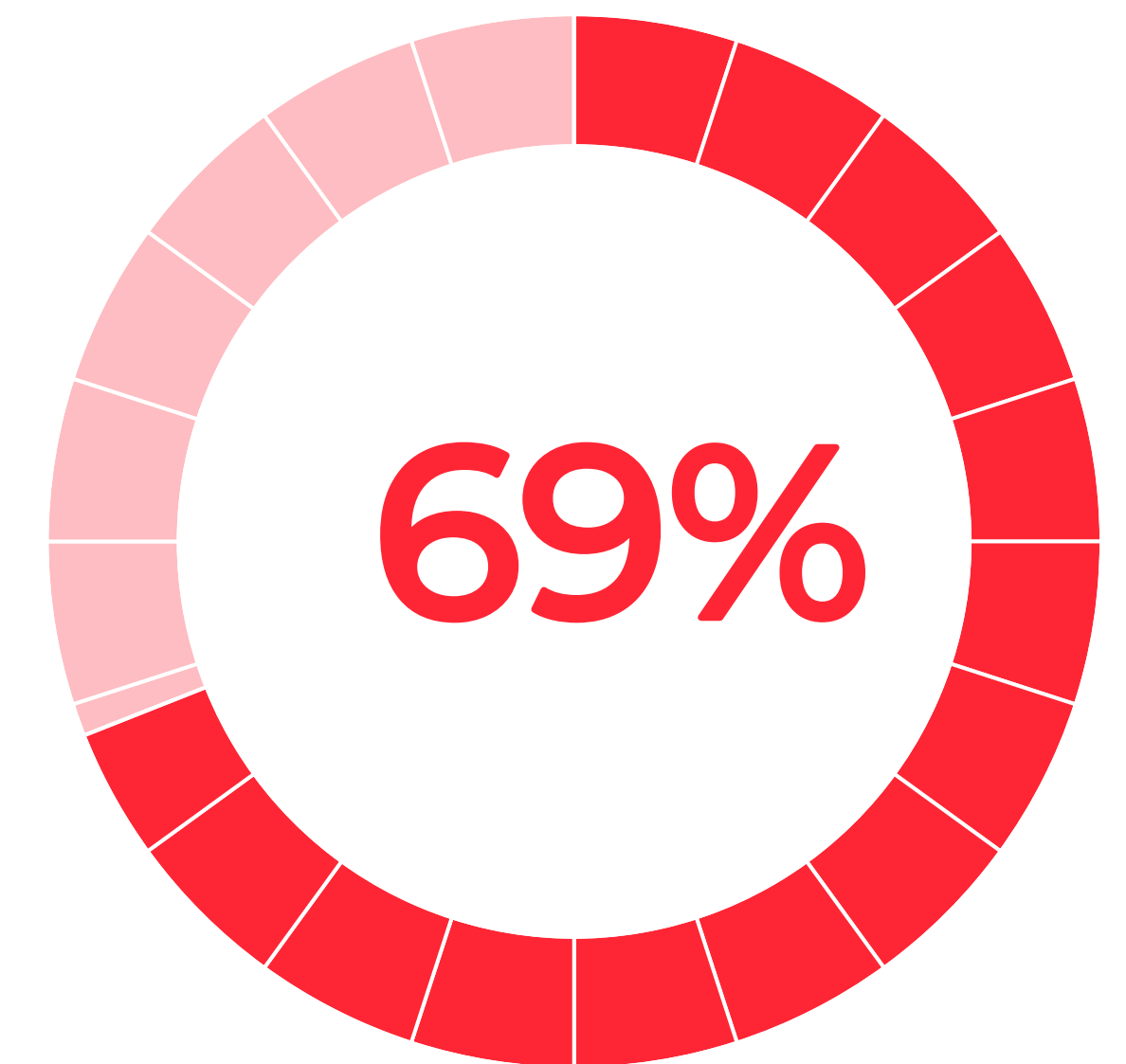
Compromisers are 18% more likely to self-identify as a foodie

Stay Up-To-Date On Food Trends



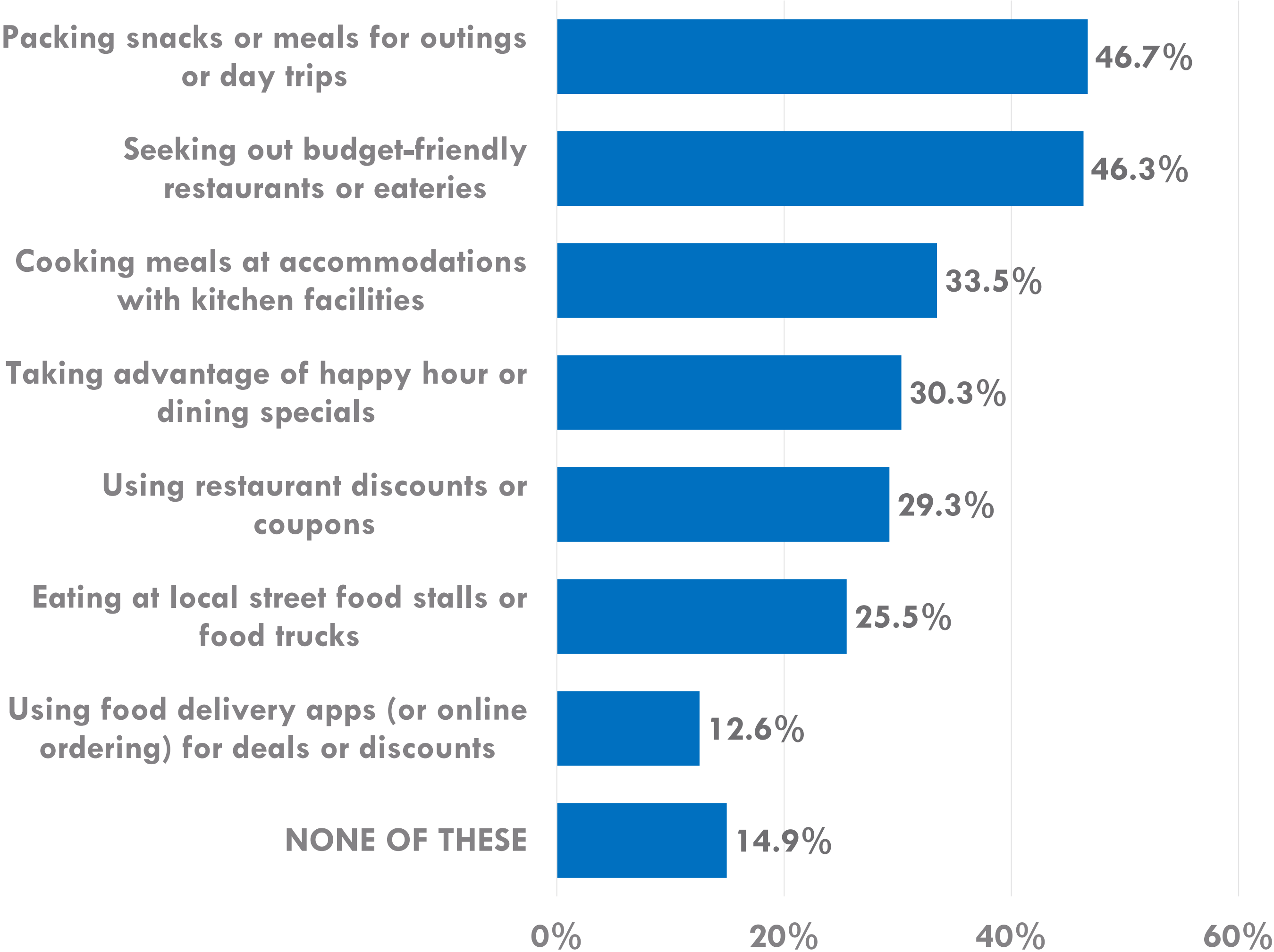
Compromisers are 42% more likely to say they stay up-to-date on food trends

Post Pictures of Food Experiences



Compromisers are 69% more likely to post pictures of food if they have a good culinary experience

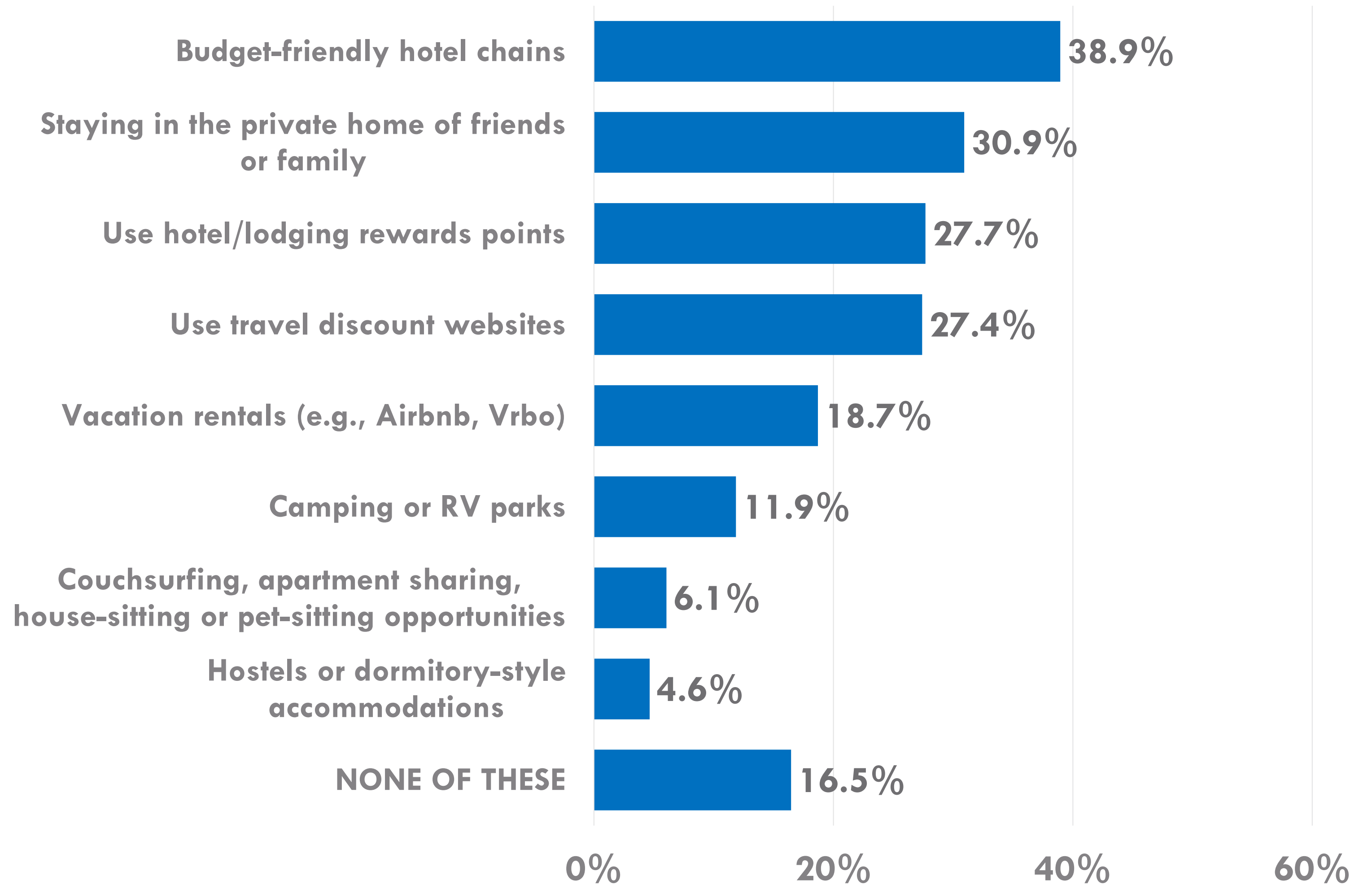
Compromising on Food & Dining



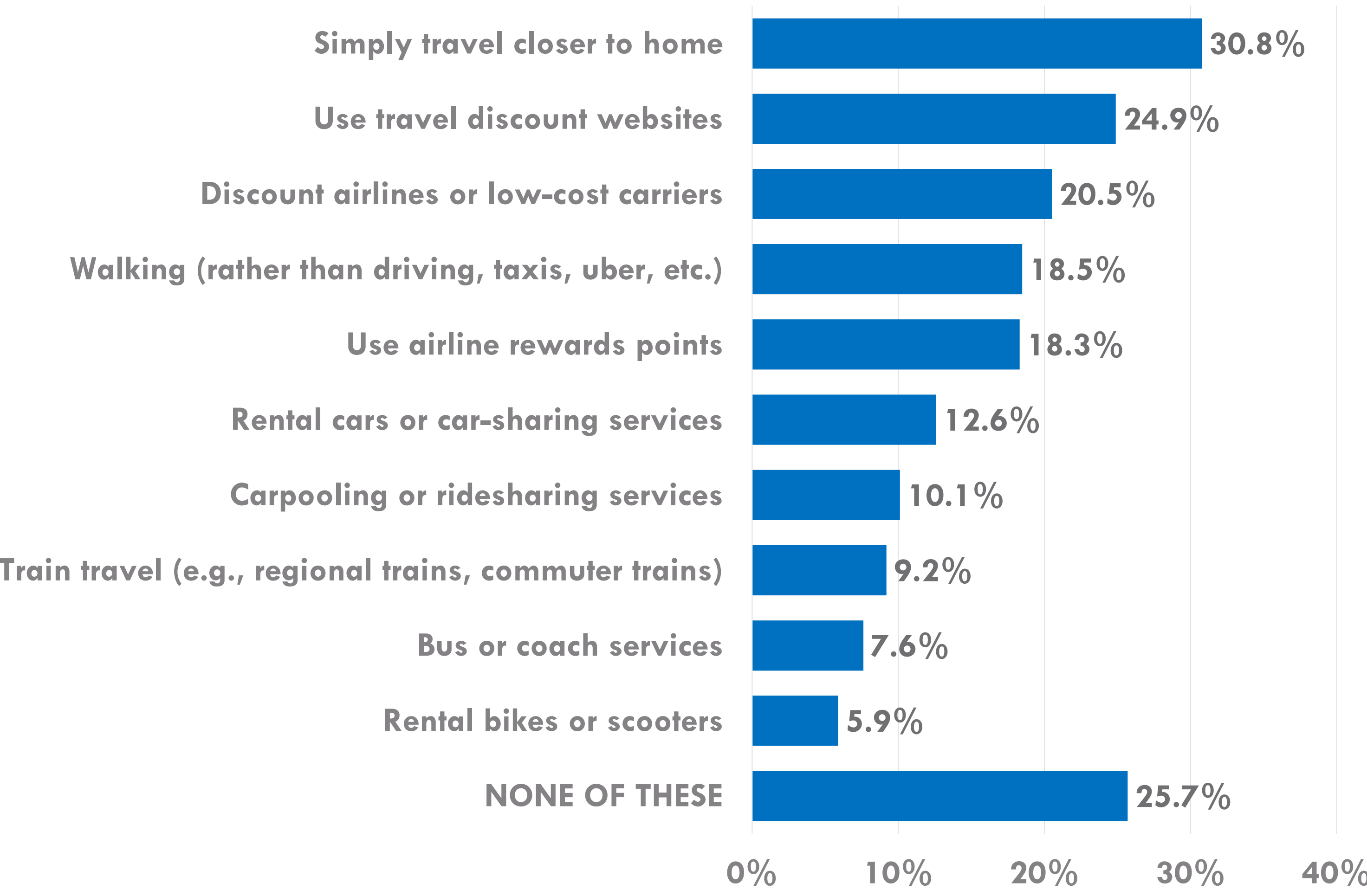
Question: In the NEXT THREE (3) MONTHS, which (if any) of these food or dining options are you likely to use specifically to save money while traveling?

Compromising on Lodging Options

Question: In the NEXT THREE (3) MONTHS, which (if any) of these lodging options are you likely to use specifically to save money while traveling?



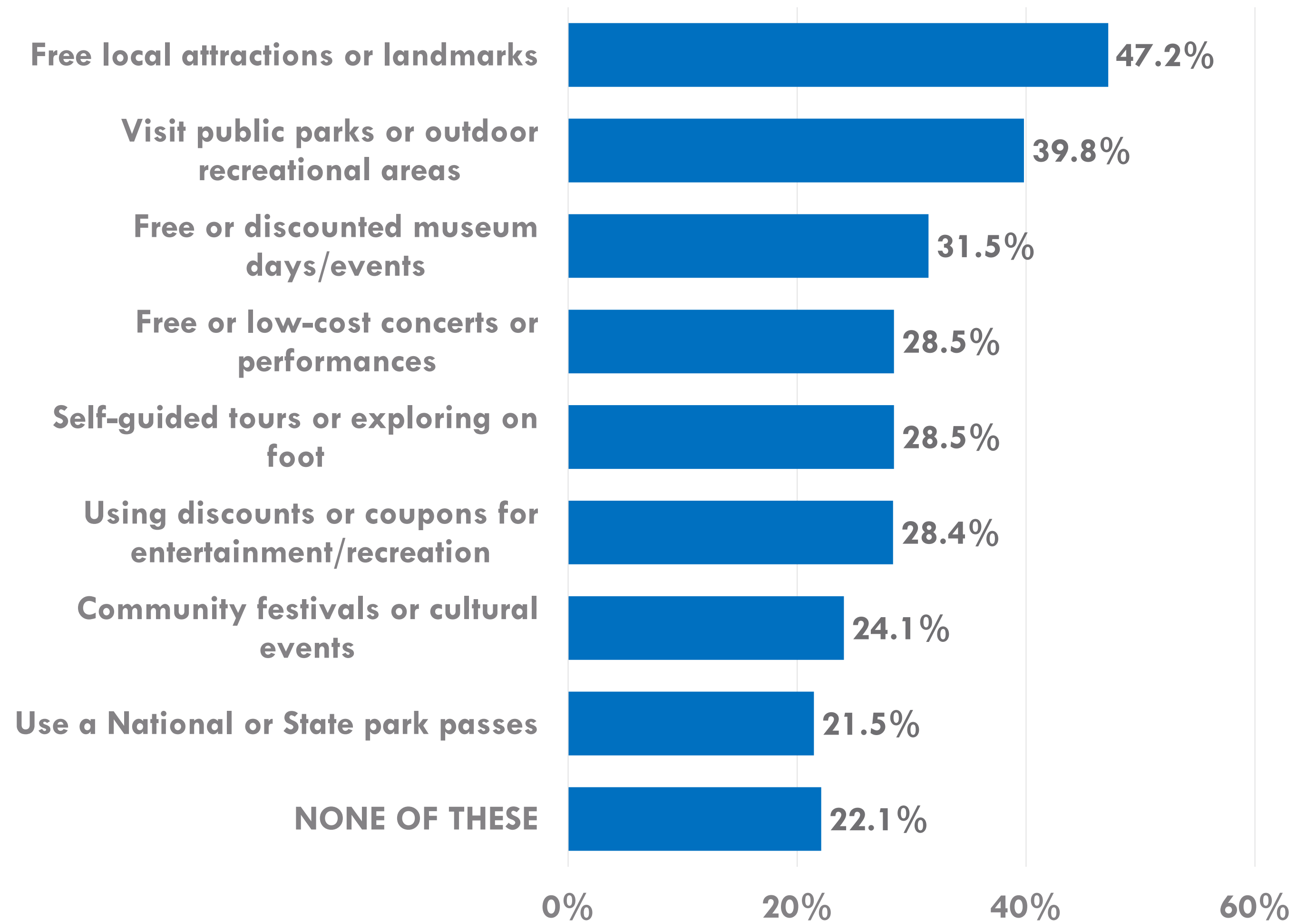
Compromising on Transportation Options



Question: In the NEXT THREE (3) MONTHS, which (if any) of these transportation options are you likely to use specifically to save money while traveling?

Compromising on Entertainment & Recreation

Question: In the NEXT THREE (3) MONTHS, which (if any) of these entertainment or recreation options are you likely to use specifically to save money while traveling?



PASSION PROFILES



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!



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