

THE STATE OF THE AMERICAN TRAVELER

Presentation of Findings
January 2023

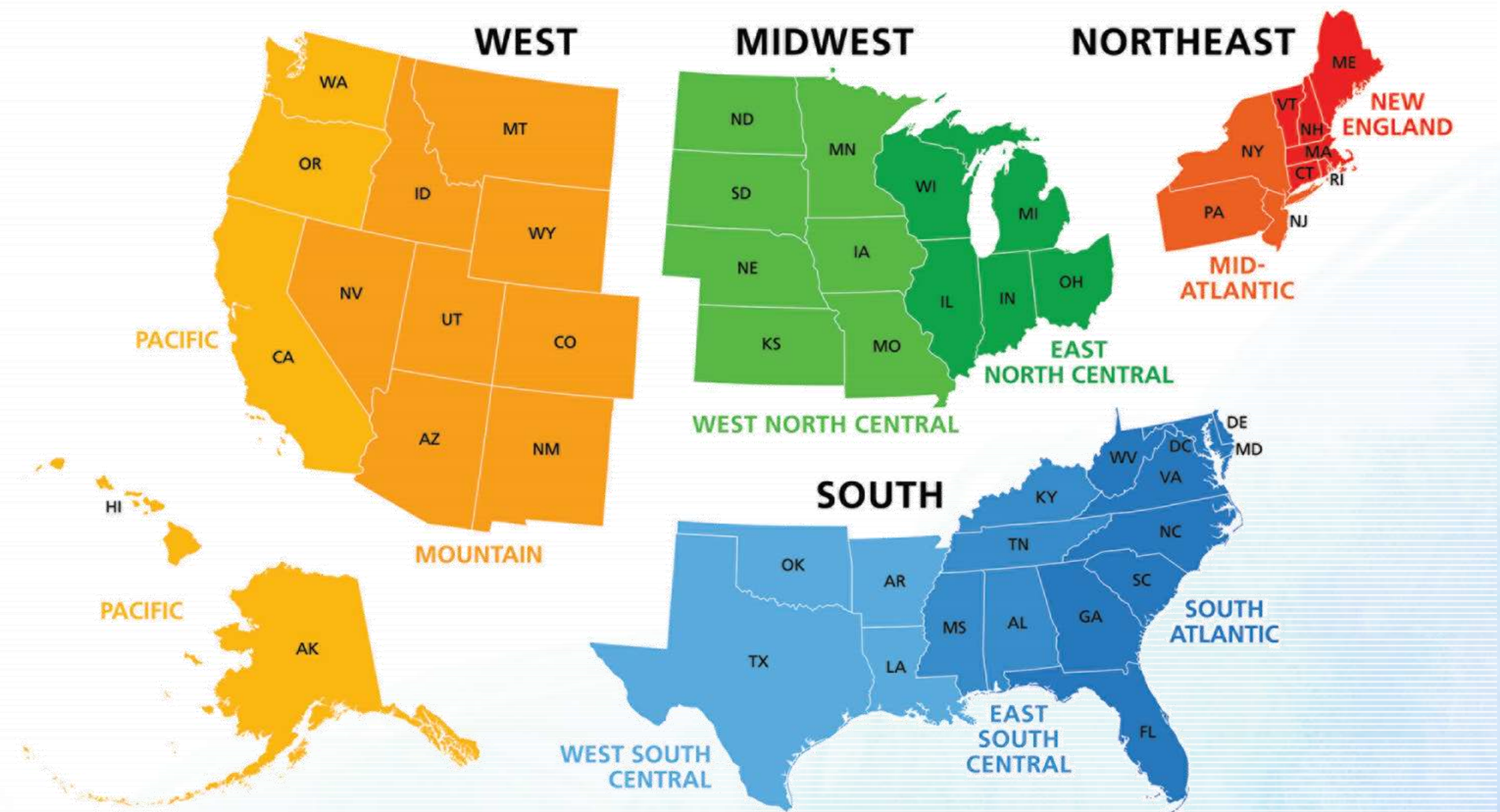
Destination  Analysts

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: **December 15-25**
- 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



A nighttime cityscape, likely Dubai, with numerous skyscrapers illuminated. Overlaid on the city is a complex digital network of glowing lines and nodes in various colors (blue, purple, pink, red). The lines connect various points across the city, creating a sense of connectivity and data flow.

Destination  Analysts

Independent, Unbiased Research

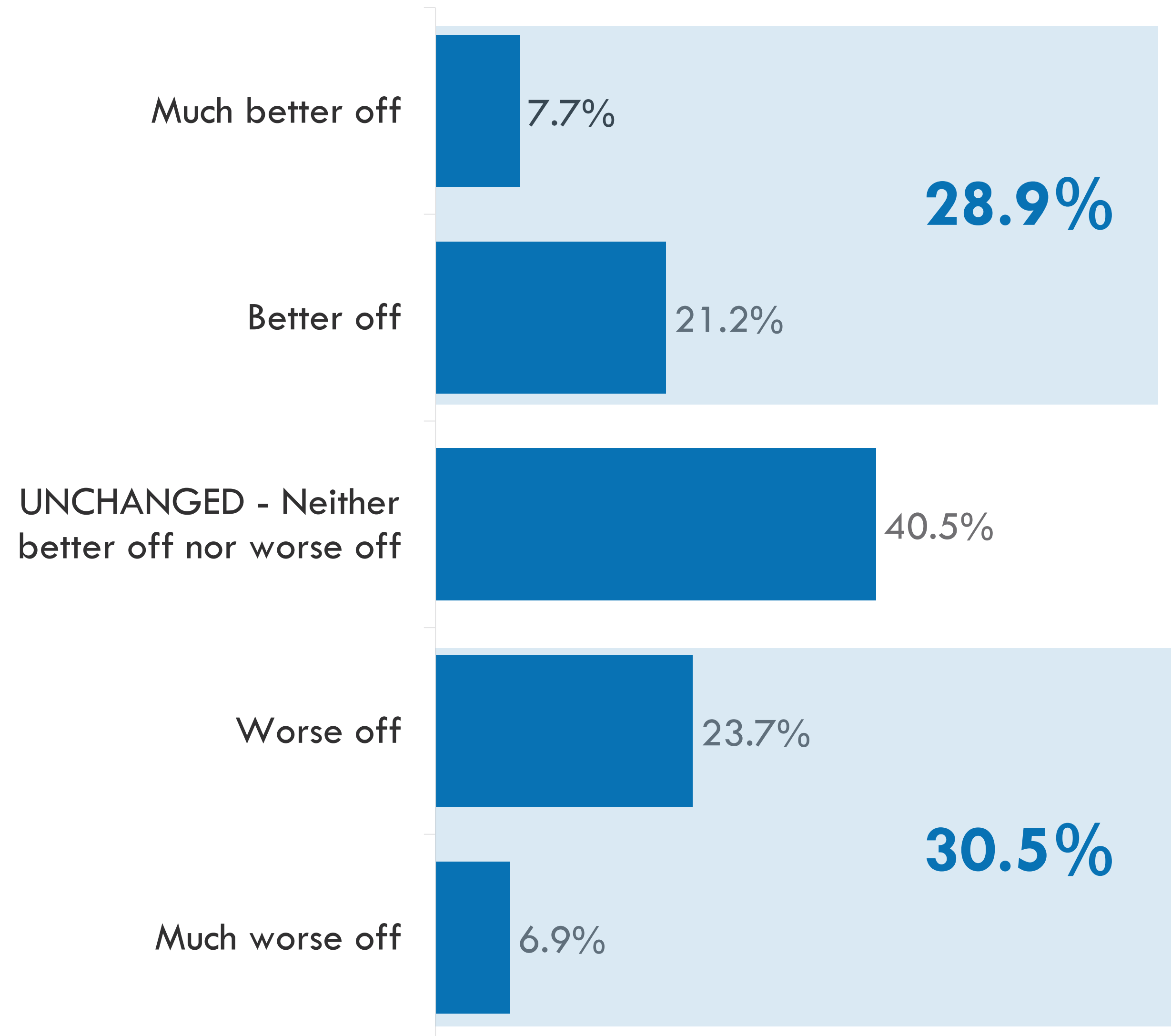


ECONOMIC CONCERNS



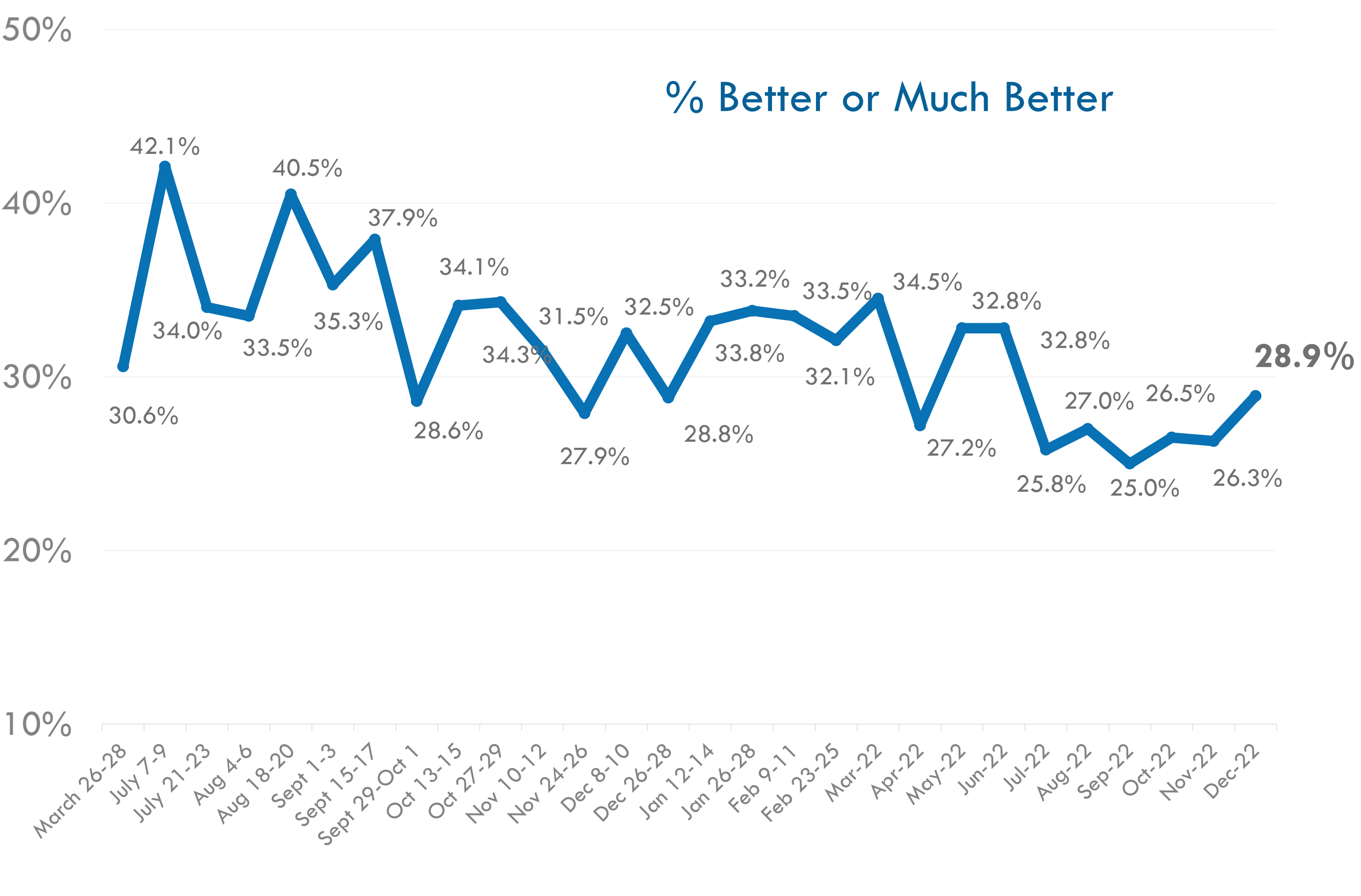
Question:

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



(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)

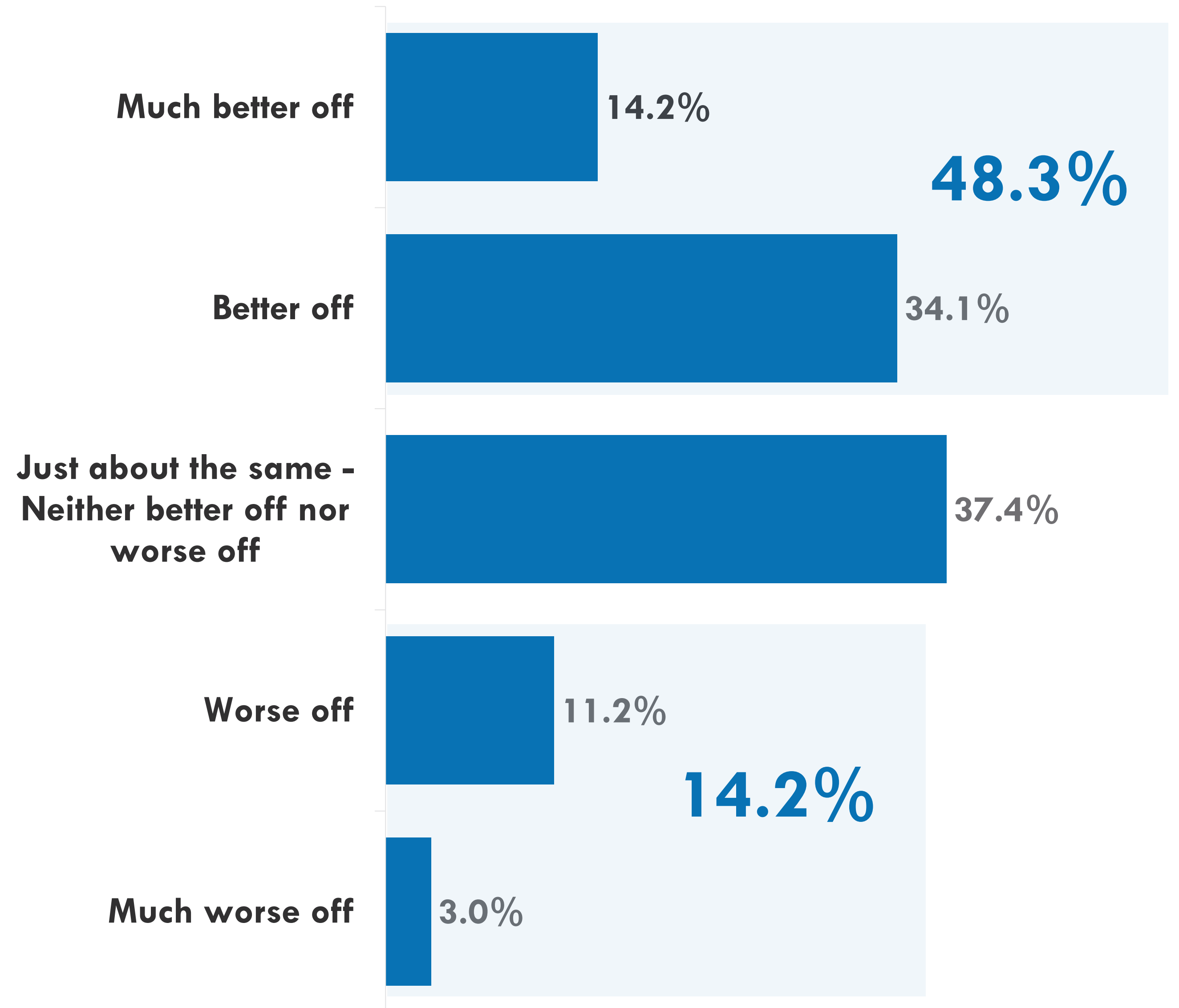
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



While slightly more travelers feel “worse off” than “better off” today compared to one year ago, recent months have seen improvement in this metric.

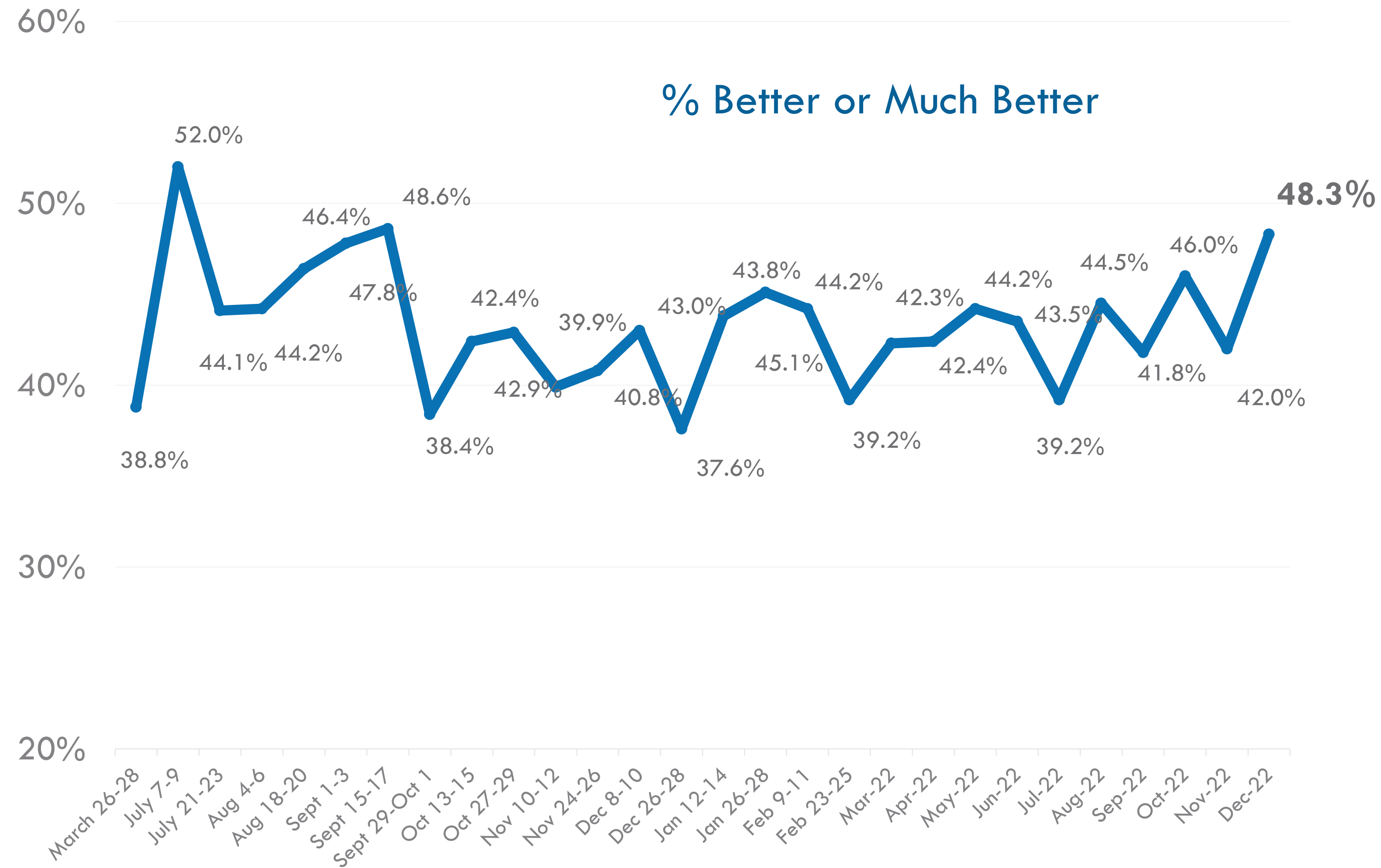
Question:

**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, 4,001 completed surveys. Data collected November 15-22, 2022.)

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?



Strong growth is seen this month in travelers expectations for their financial prospects in the next year.

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

5.1%

21.9%

Yes - It is a good time

16.8%

It is neither a good time nor bad time

34.6%

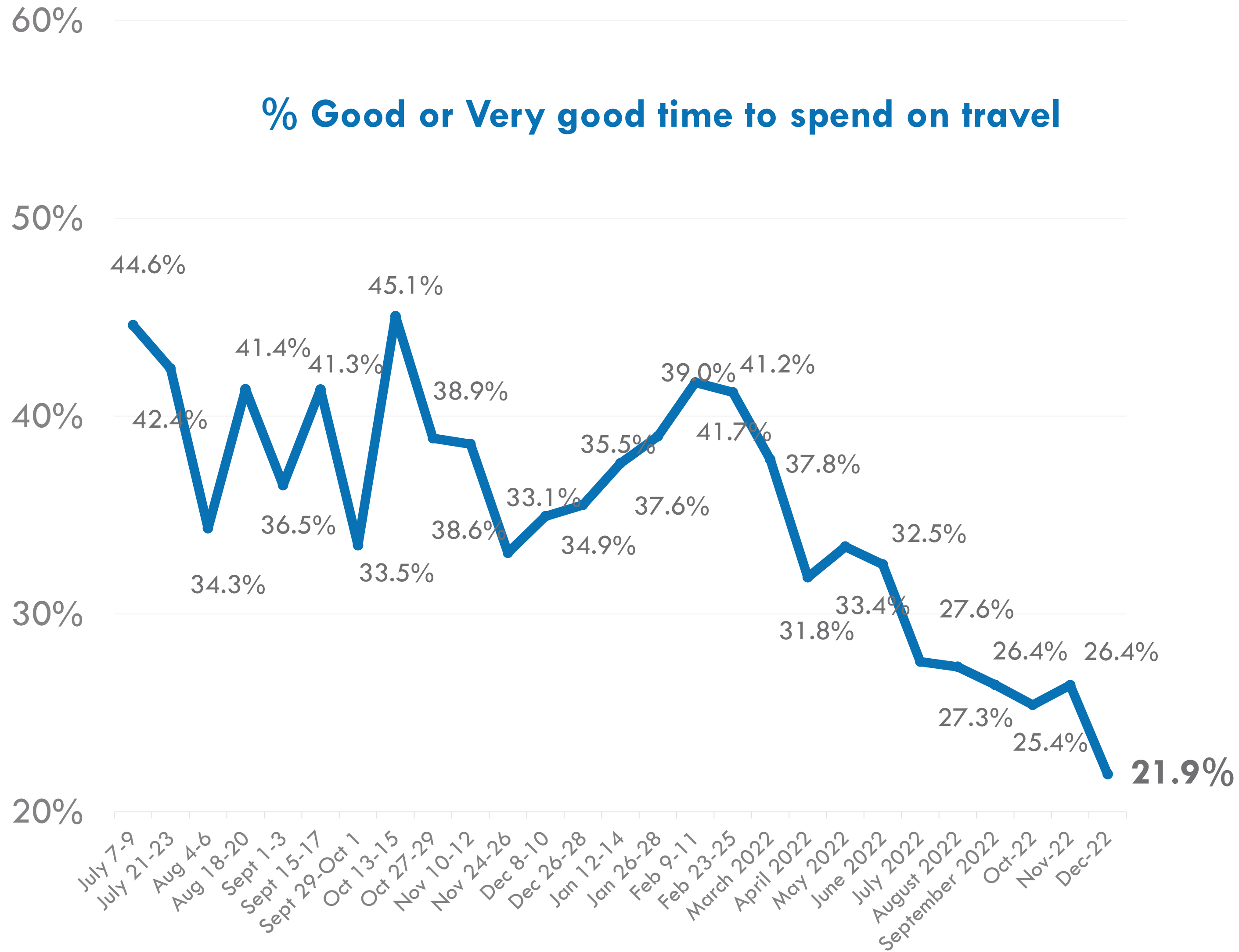
No - It is a bad time

27.8%

43.5%

No - It is a very bad time

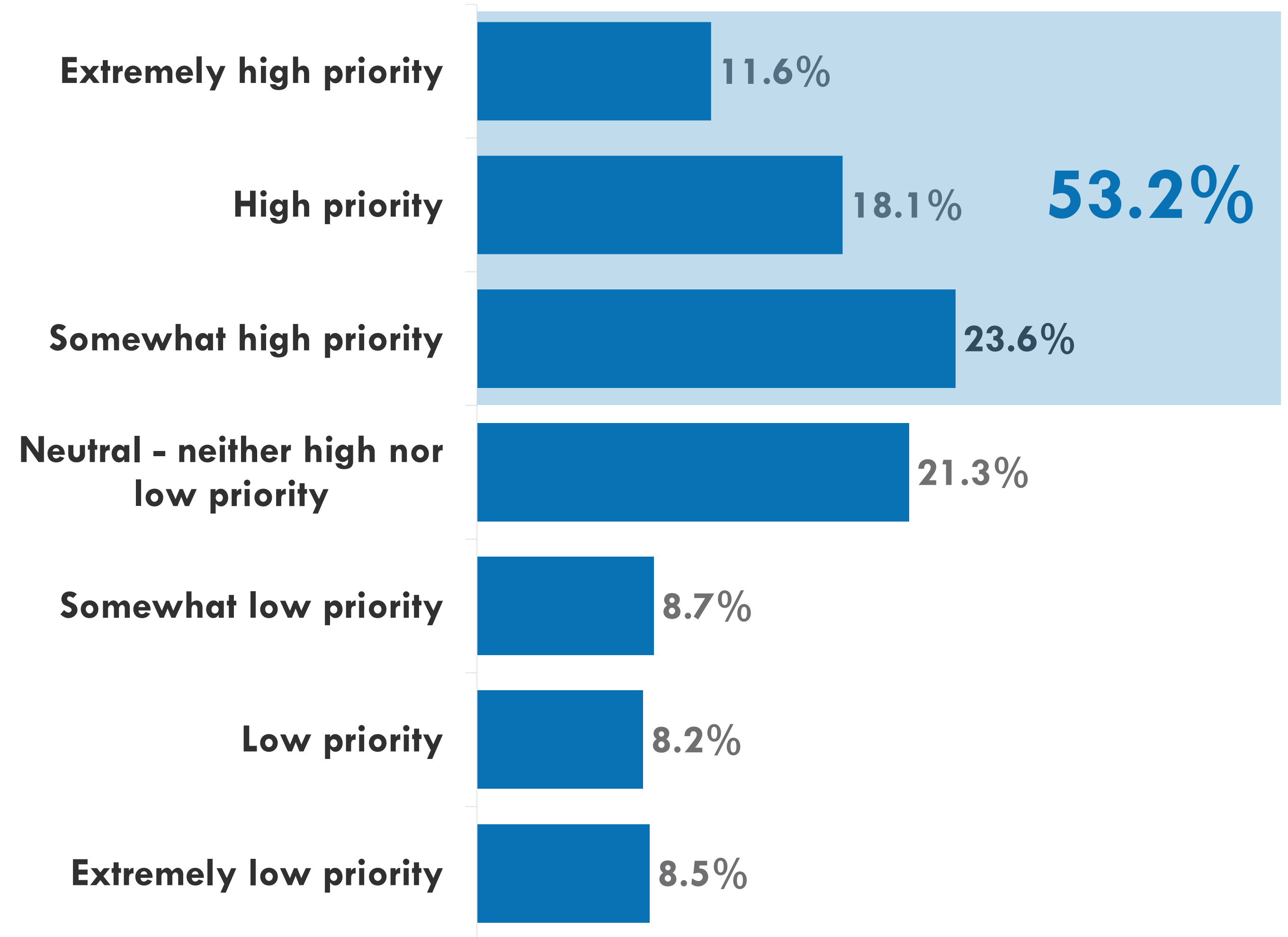
15.7%



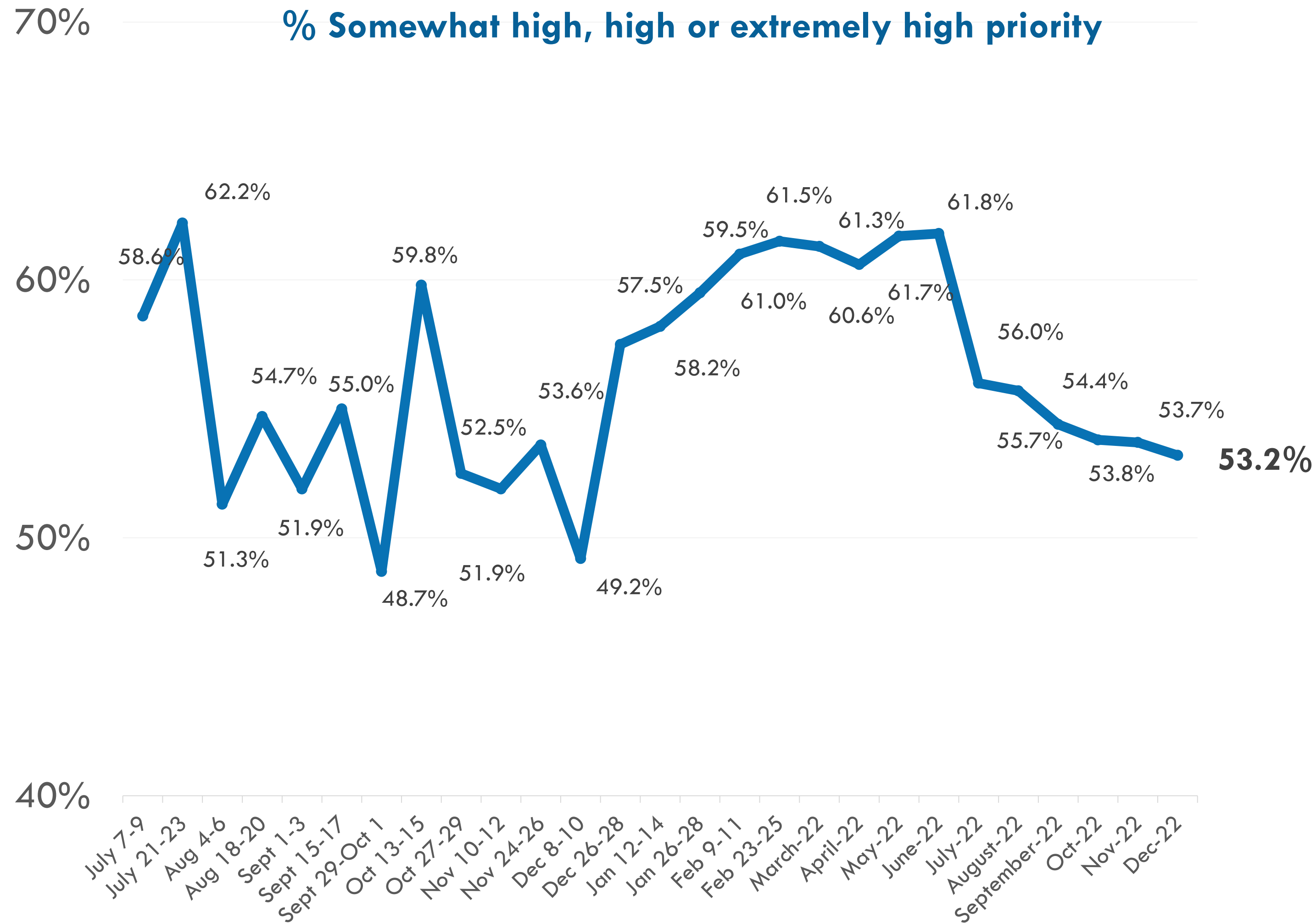
The proportion of Americans who feel it is a “good time” to spend on leisure travel continues to decline sharply.

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**



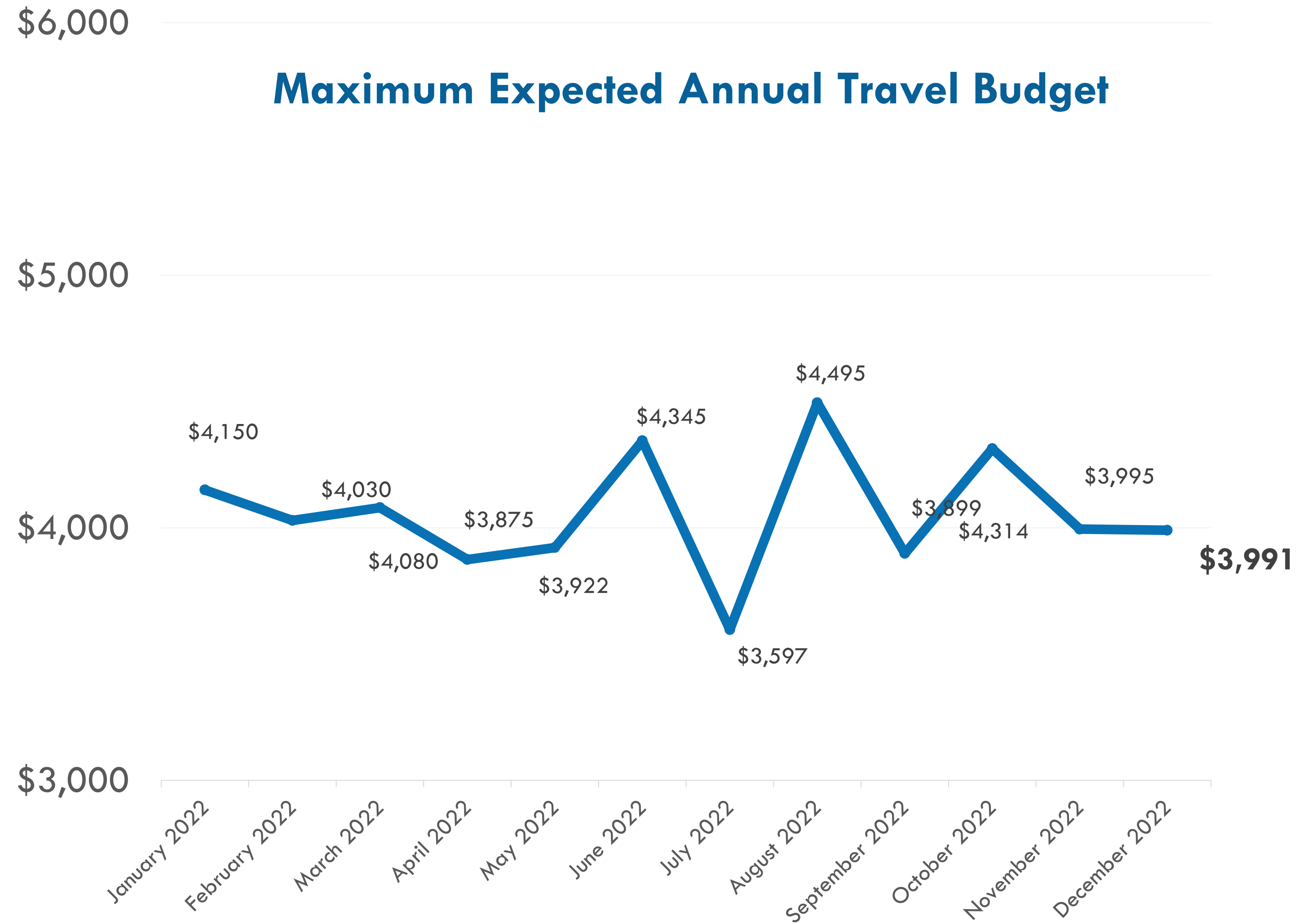
(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)



The majority of travelers continues to prioritize travel in their budgets. Still, this also continues to decline.

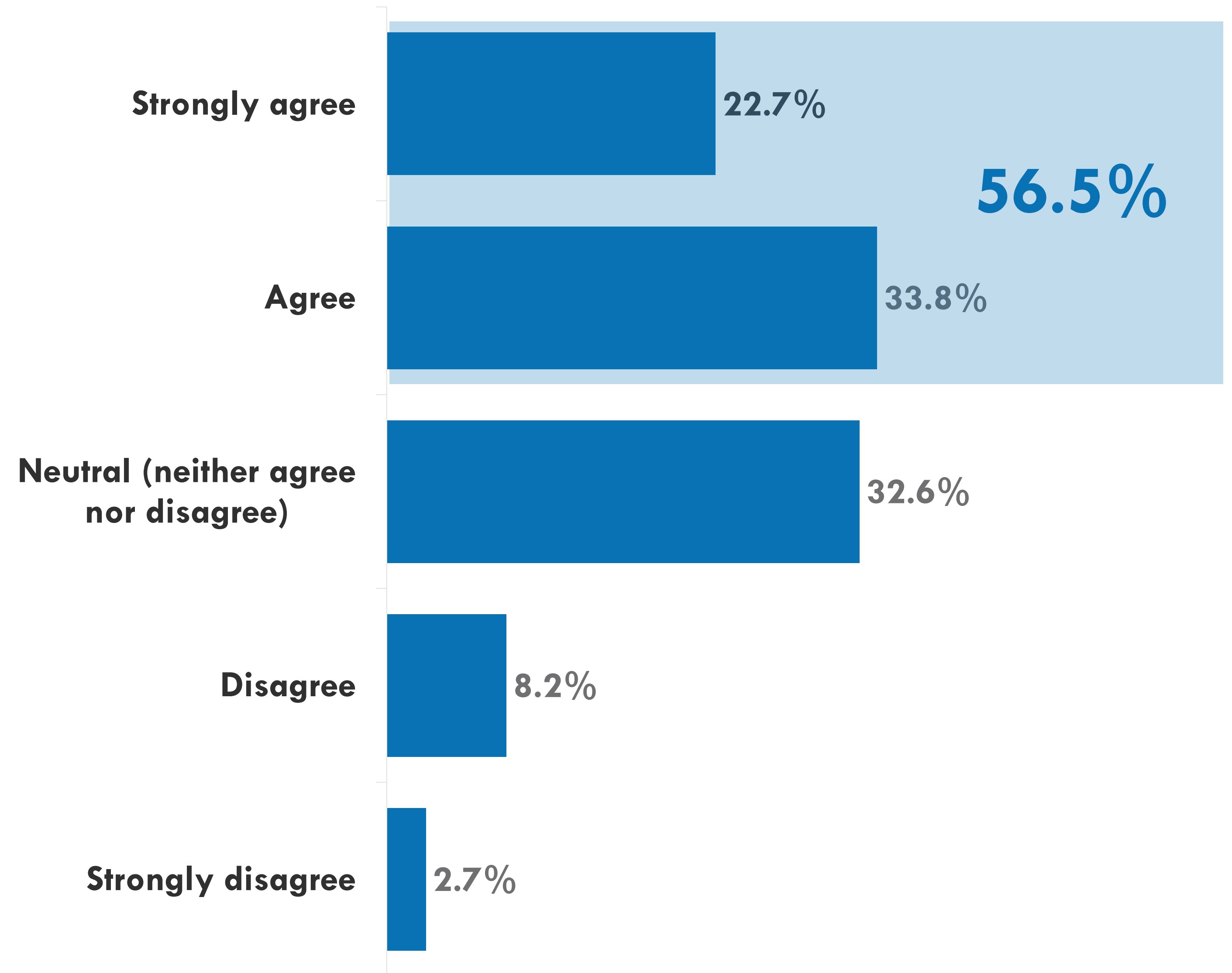
Question:

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?

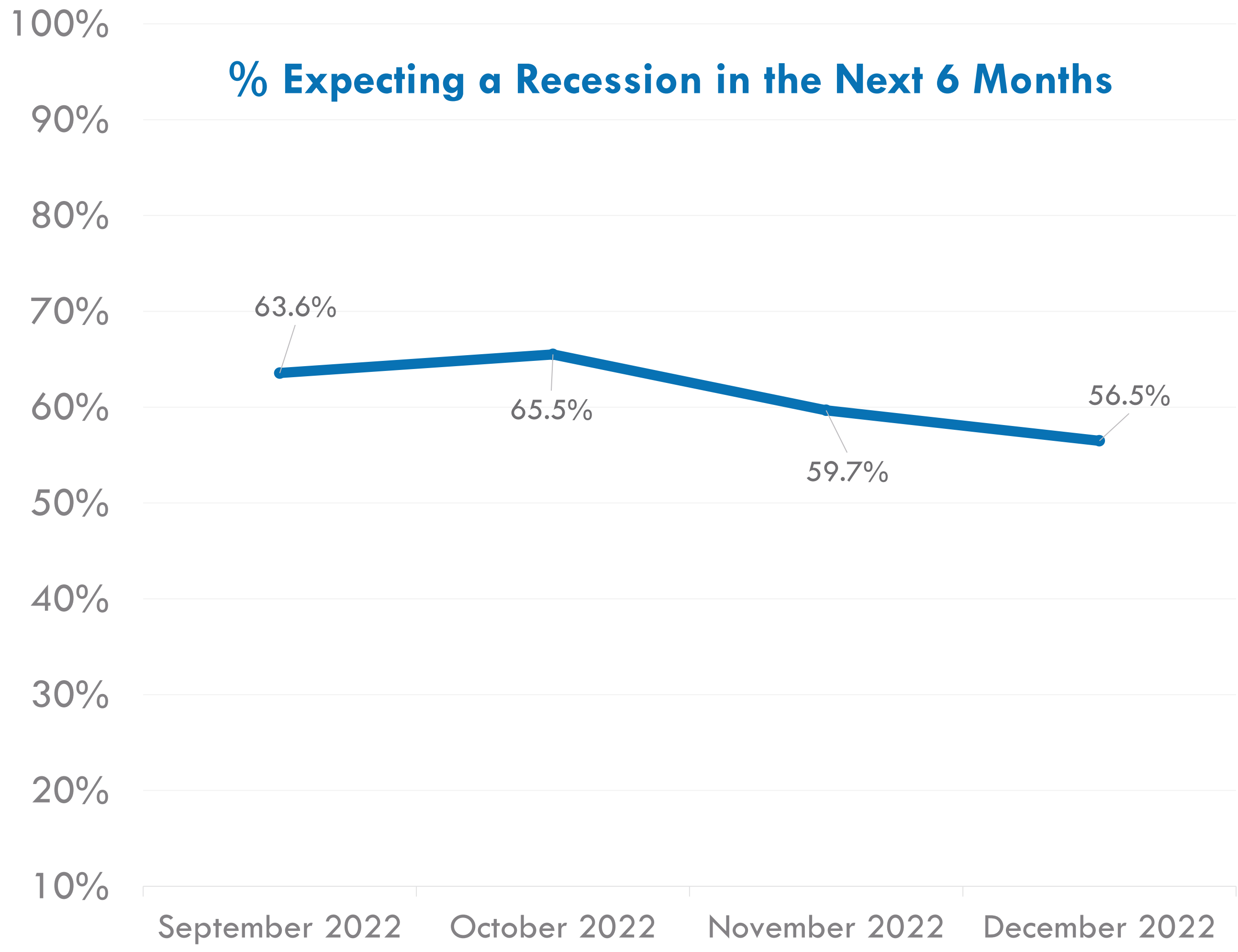


Question:

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



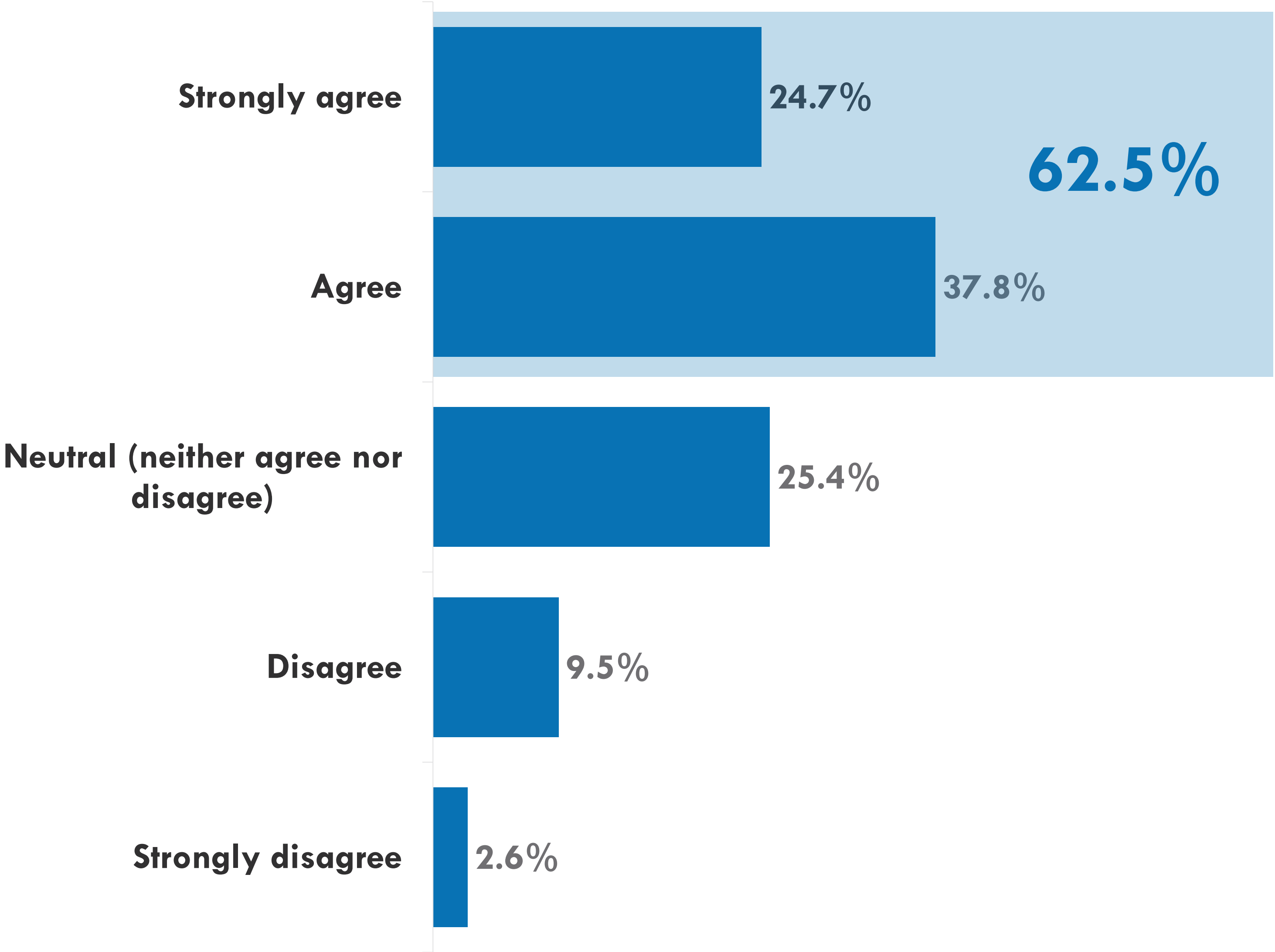
(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)



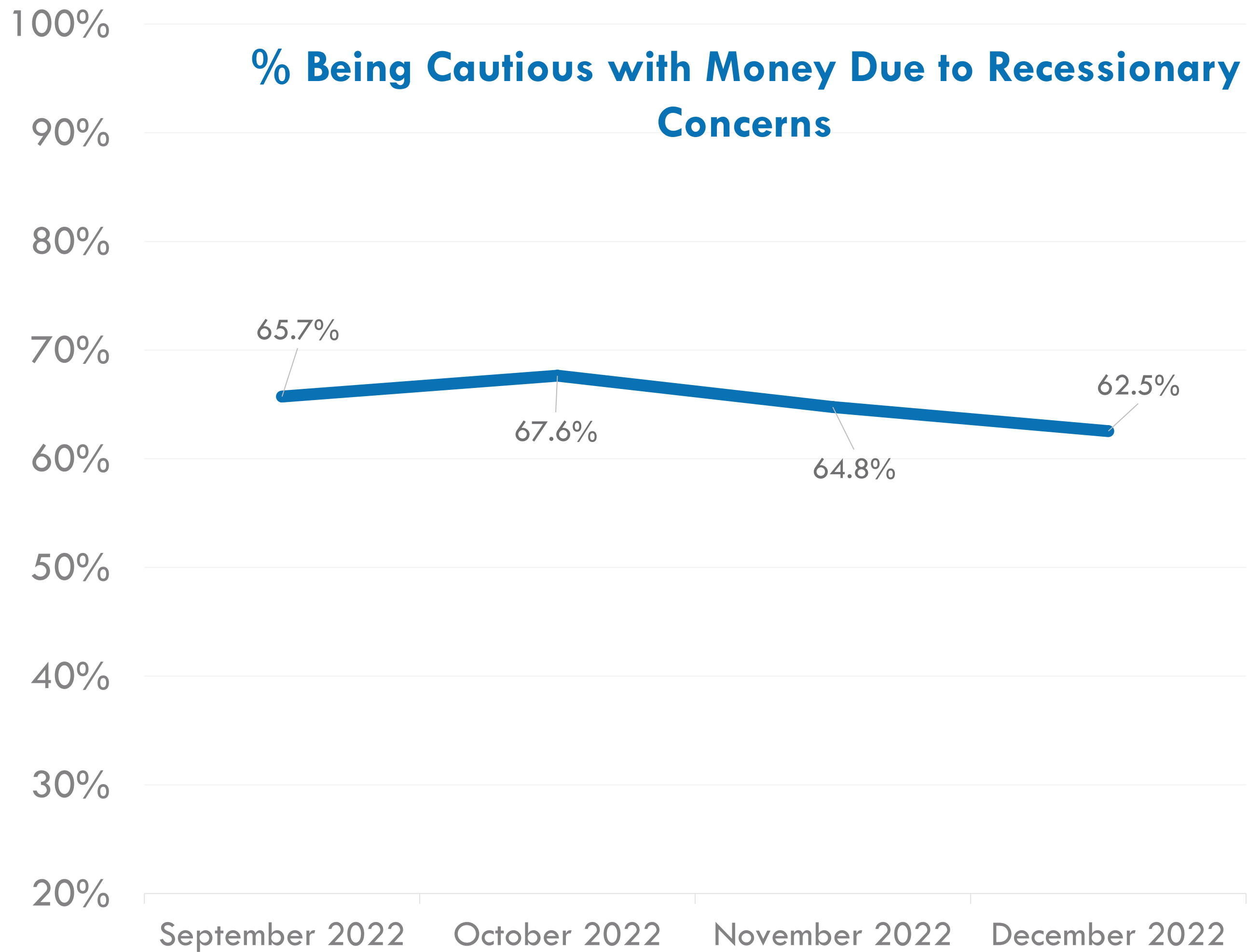
Recessionary fears have abated slightly.

Question:

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



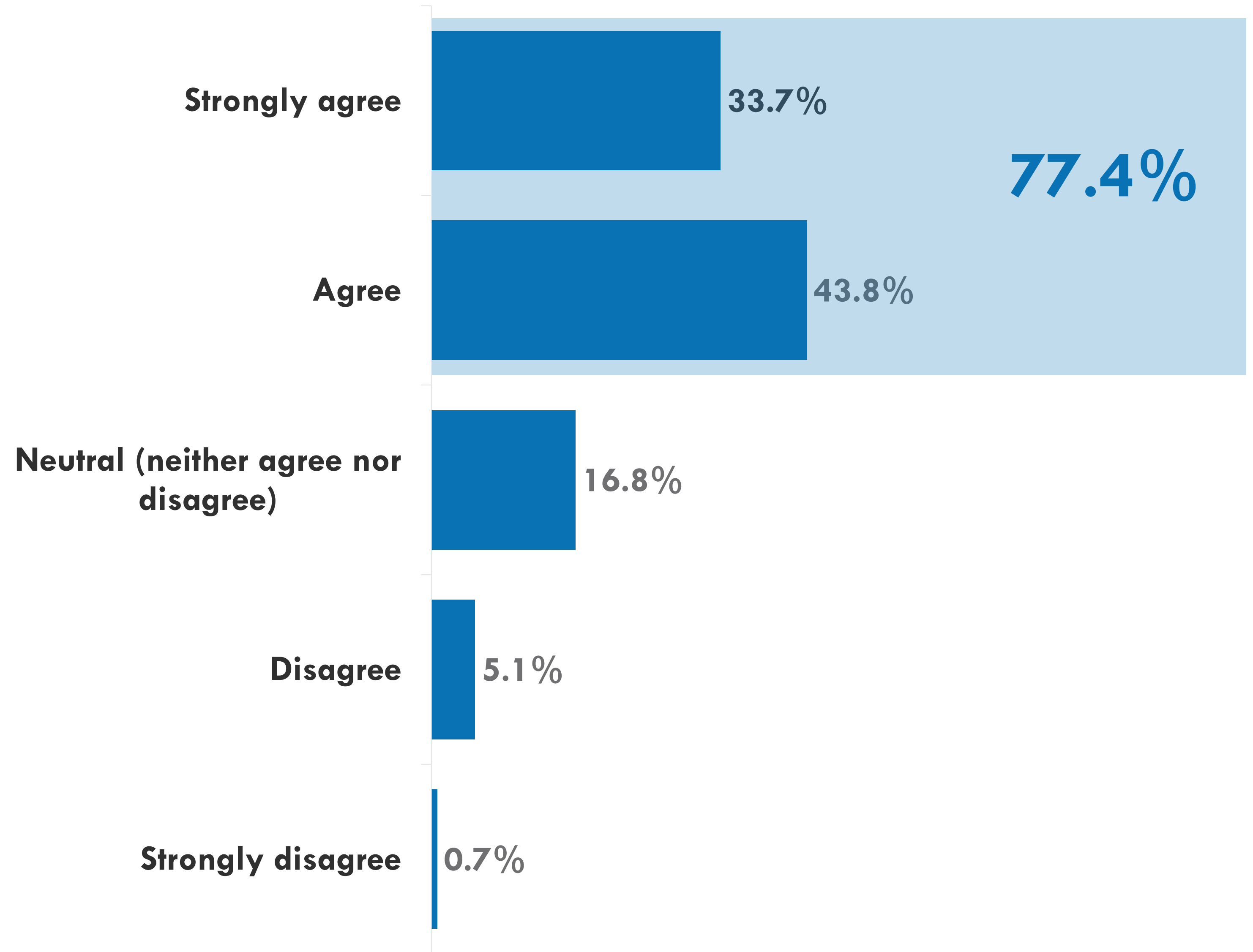
(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)



Slightly fewer travelers are exercising spending caution due to concerns about a recession.

Question:

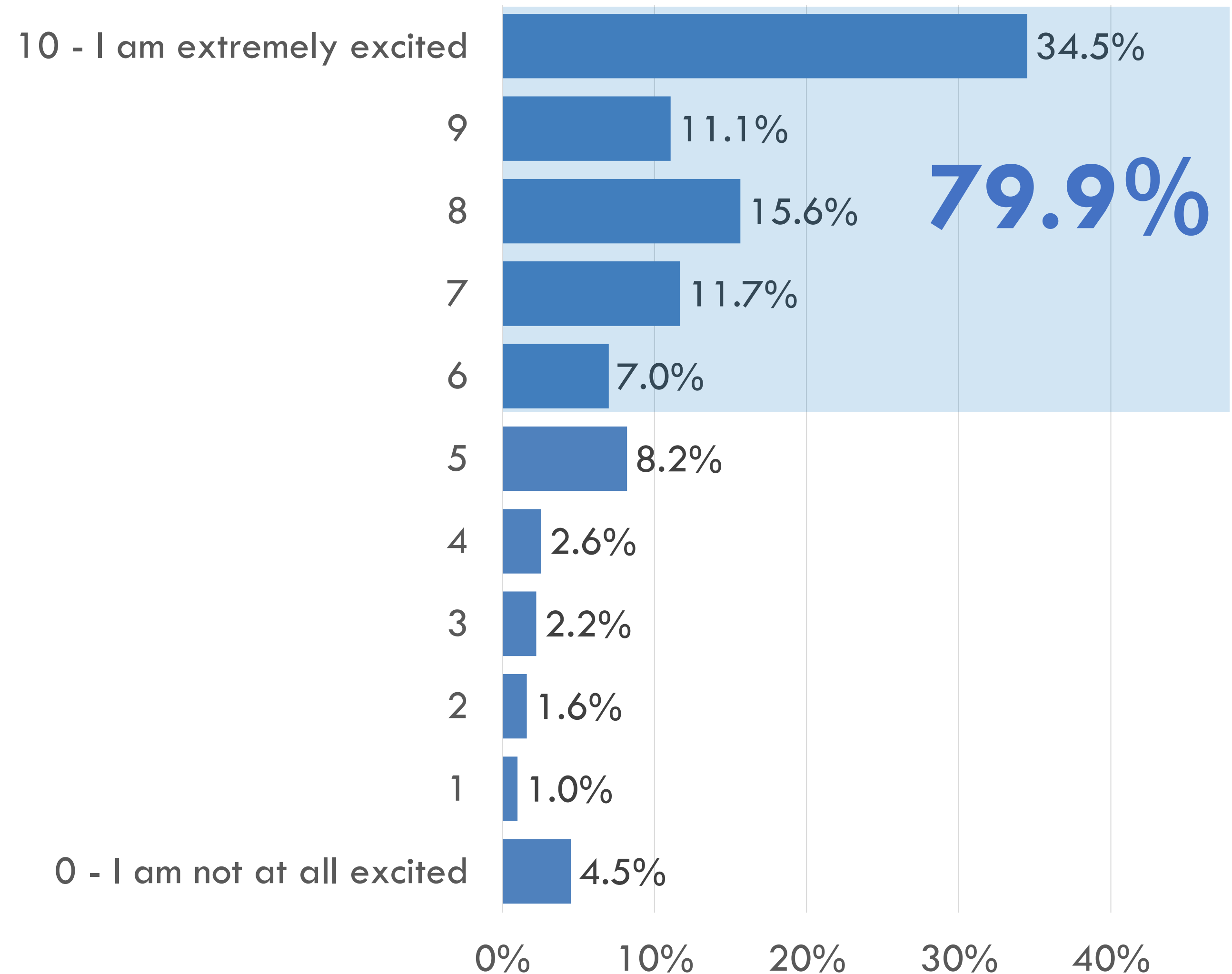
**My increased caution
with money
includes reducing my
expenditures on travel**



(Base: All respondents who said they were being more cautious with money due to inflation concerns, 2,572 completed surveys. Data collected November 15-21, 2022.)

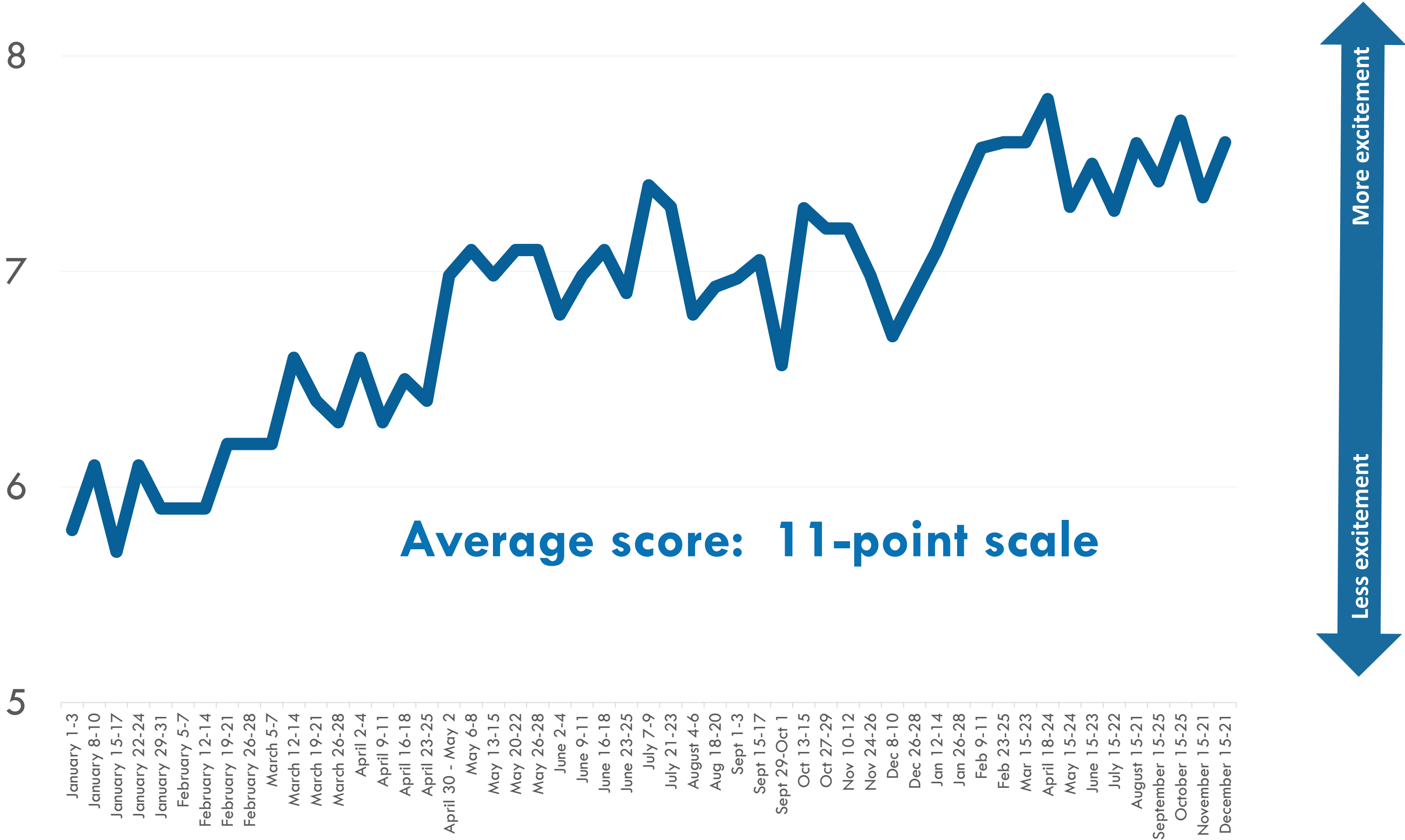
Question:

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



(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)

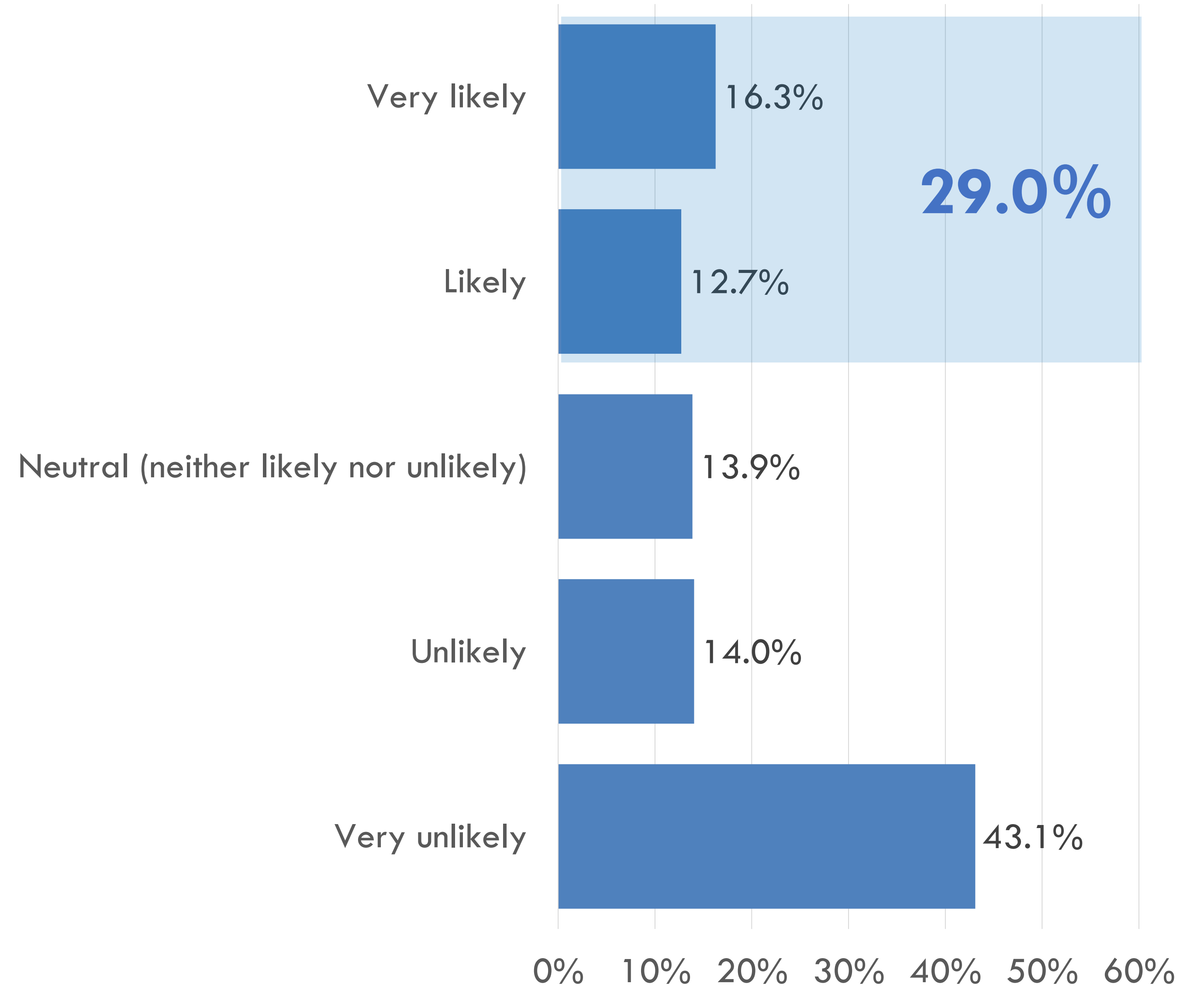
Question: Which best describes how excited you are about **LEISURE TRAVEL** in the **NEXT TWELVE (12) MONTHS?** (Please answer using the 11-point scale below)



Excitement to travel has remained elevated but stable in recent months.

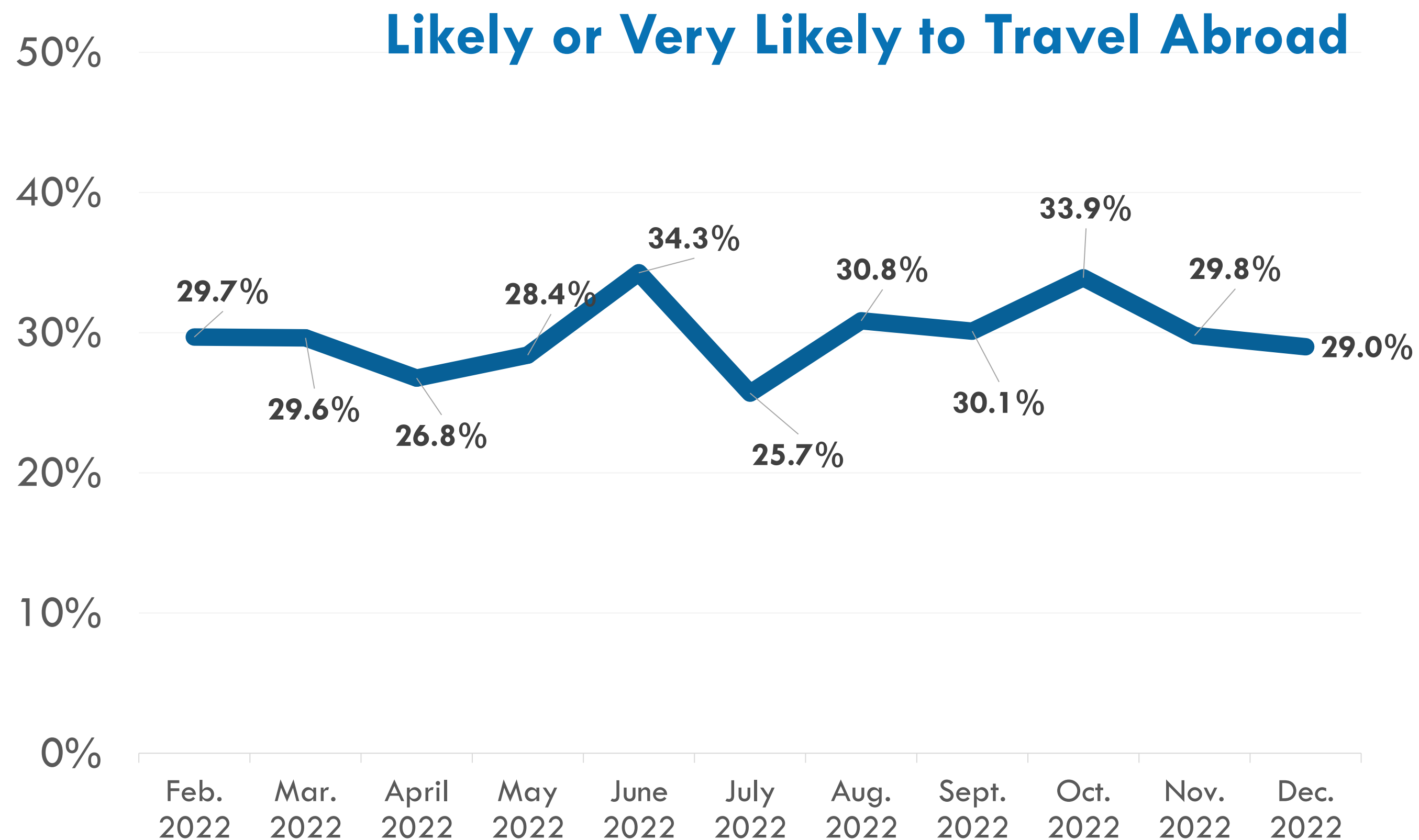
Question:

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



(Base: All respondents, 4,001 completed surveys. Data collected November 15-22, 2022.)

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

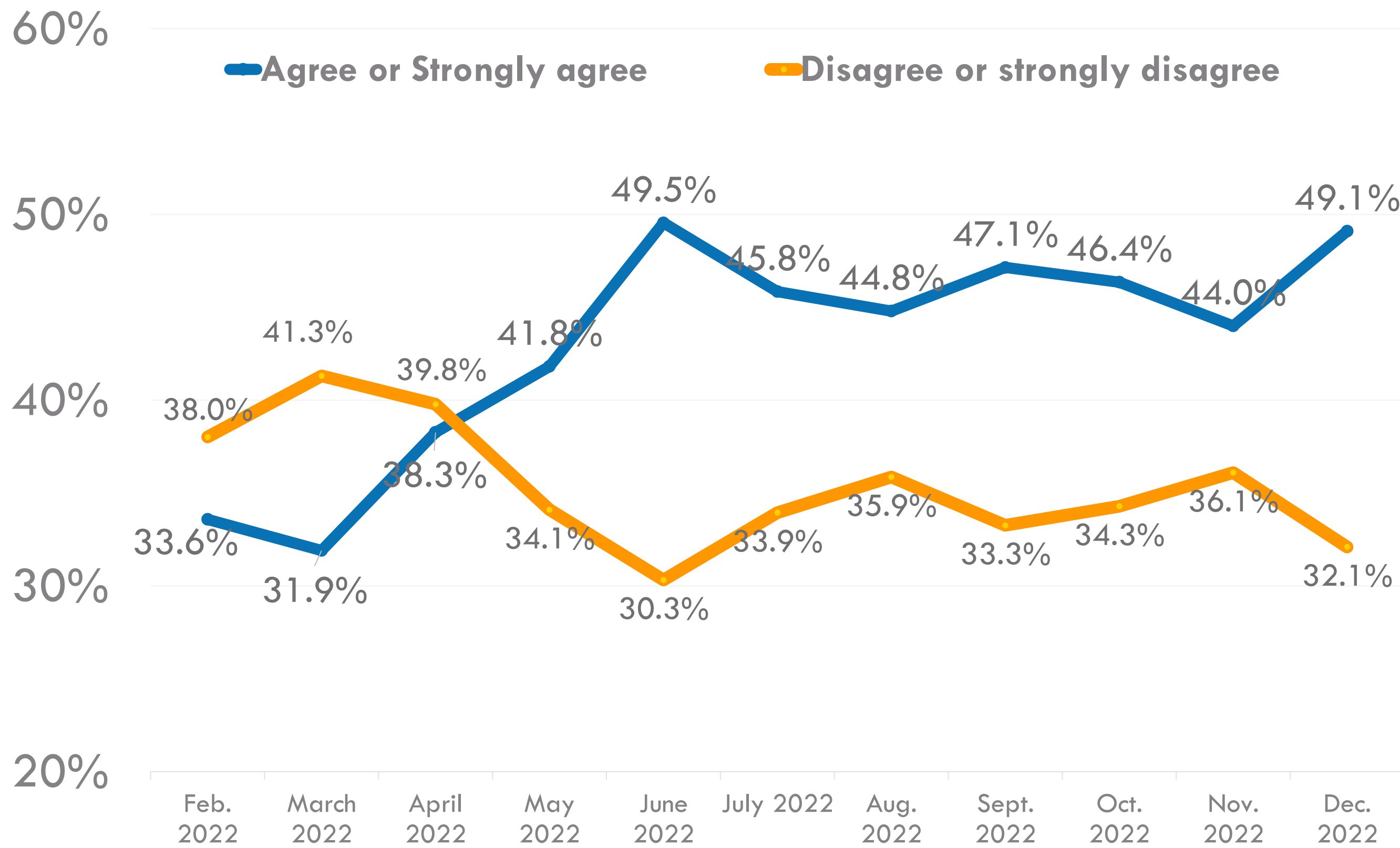
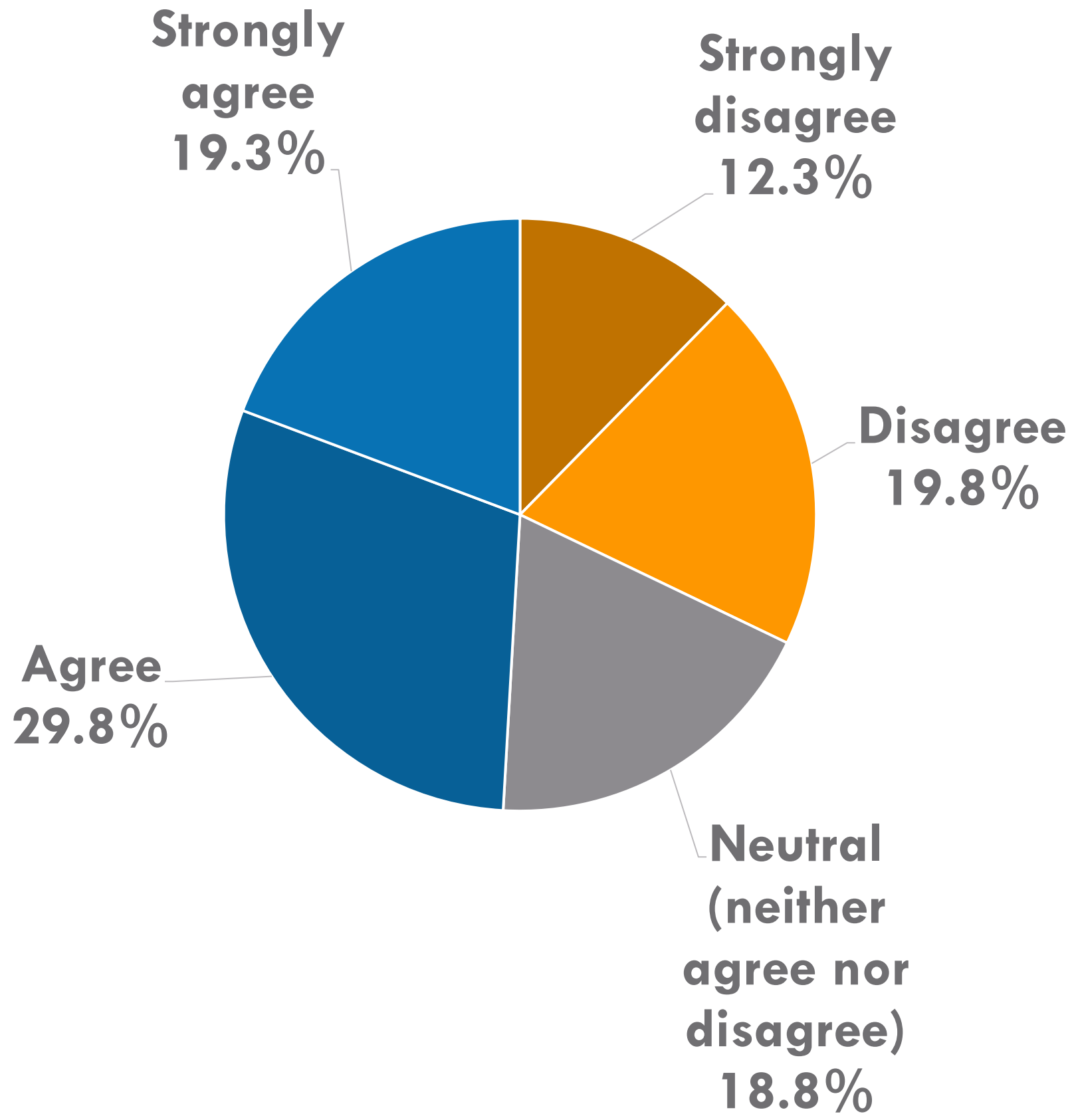


Expectations for travel outside the United States has also shown little change.

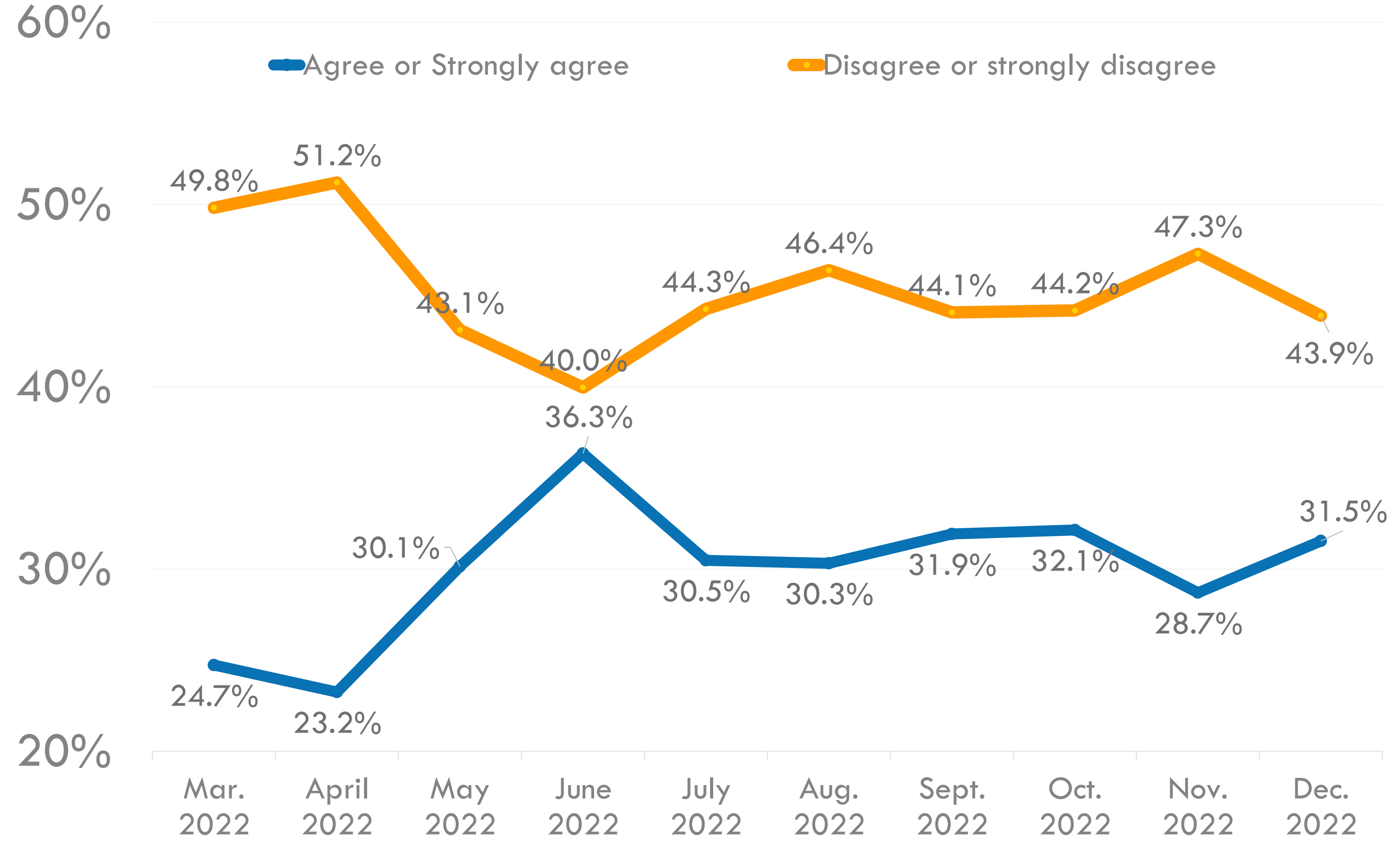
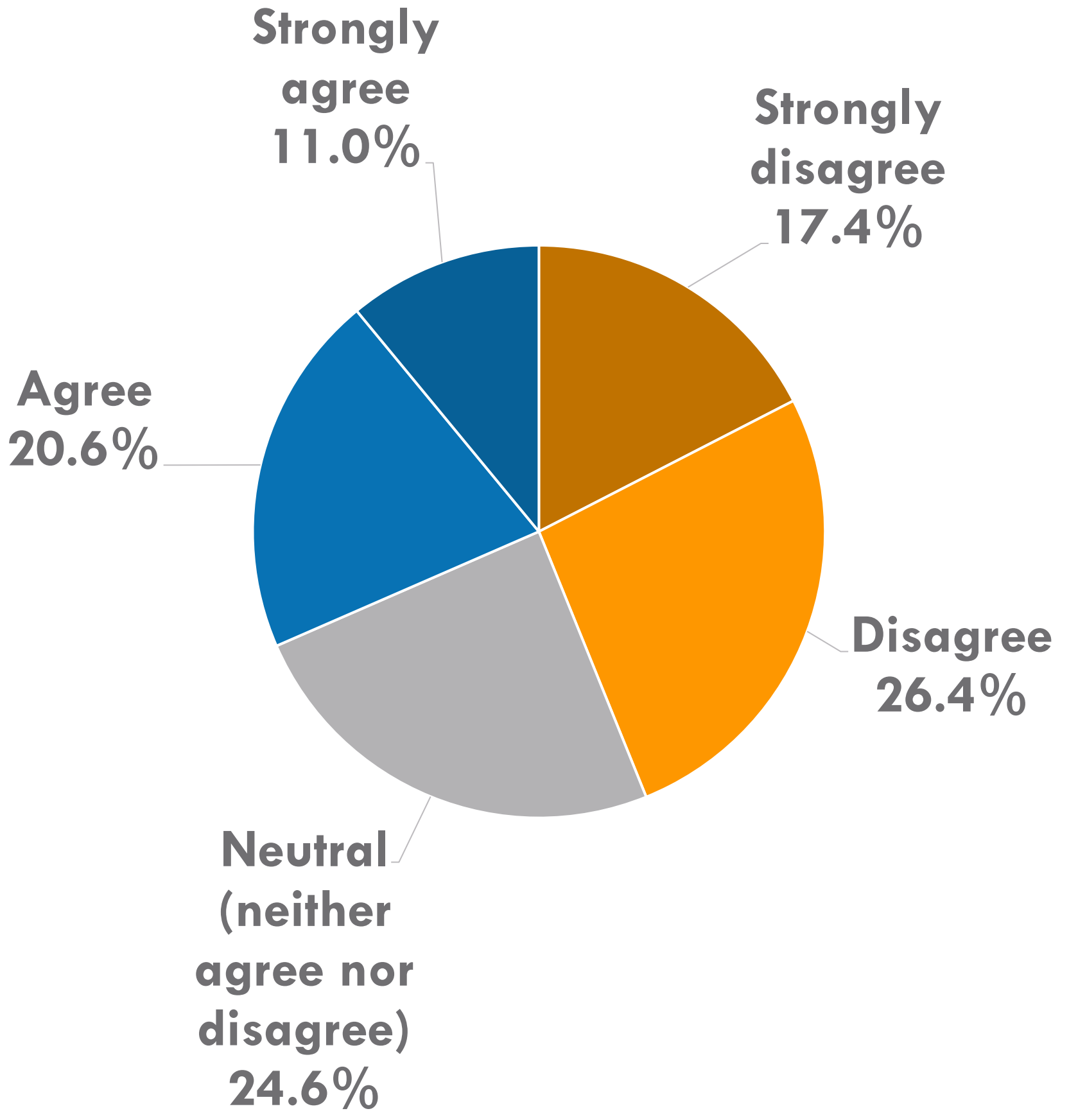
TRAVEL PRICES & INFLATION



HIGH TRAVEL PRICES HAVE KEPT ME FROM TRAVELING IN THE PAST MONTH.



RECENT INFLATION IN CONSUMER PRICES HAS LED ME TO CANCEL AN UPCOMING TRIP.



A vintage yellow car is parked on a grassy field. On the roof of the car, there is a stack of colorful luggage (red, blue, and white) and a yellow bicycle. The background features a large, dark, rocky mountain peak on the right, a stream in the foreground, and trees on the left. The scene is bathed in warm, golden light, suggesting a sunset or sunrise.

TRAVEL SENTIMENT INDICES

NEW!

TRAVEL SENTIMENT INDICES

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

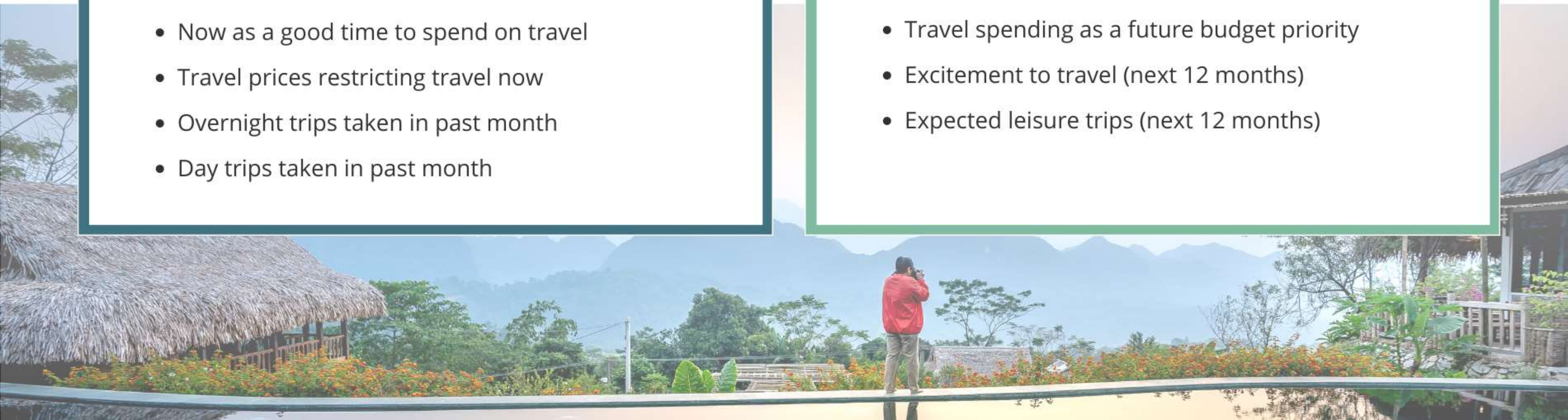
Index values are calculated by combining key questions.

Current Travel Sentiment Index:

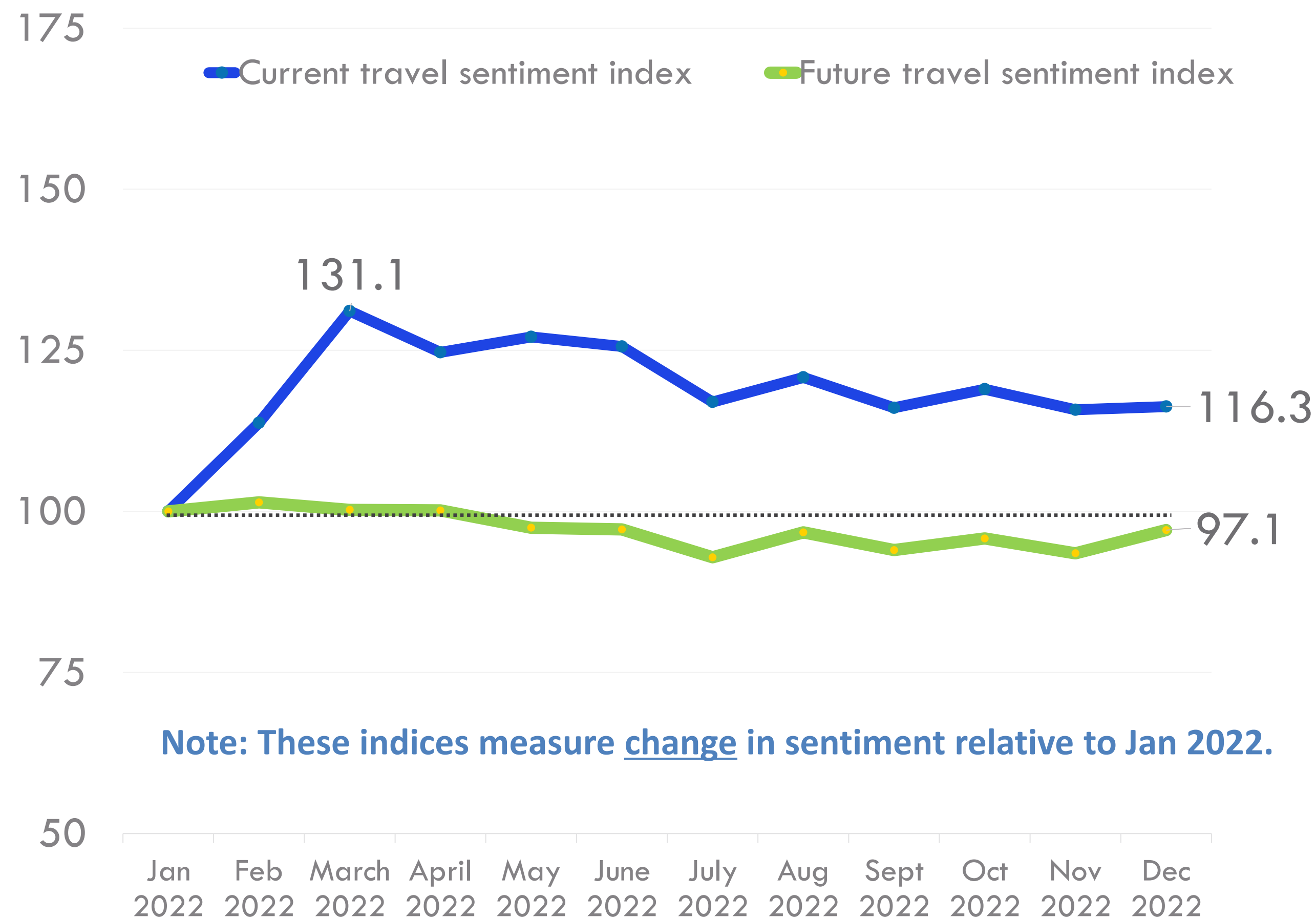
- Current financial situation
- Now as a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in past month
- Day trips taken in past month

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:



- Current travel enthusiasm grew sharply early in 2022, but retracted as inflationary pressures grew.
- Expectations for future travel have remained relatively stable throughout the year, and now stand slightly below one year ago.



EXPECTATIONS FOR 2023

↑
2023

Question: Let's talk about next year.

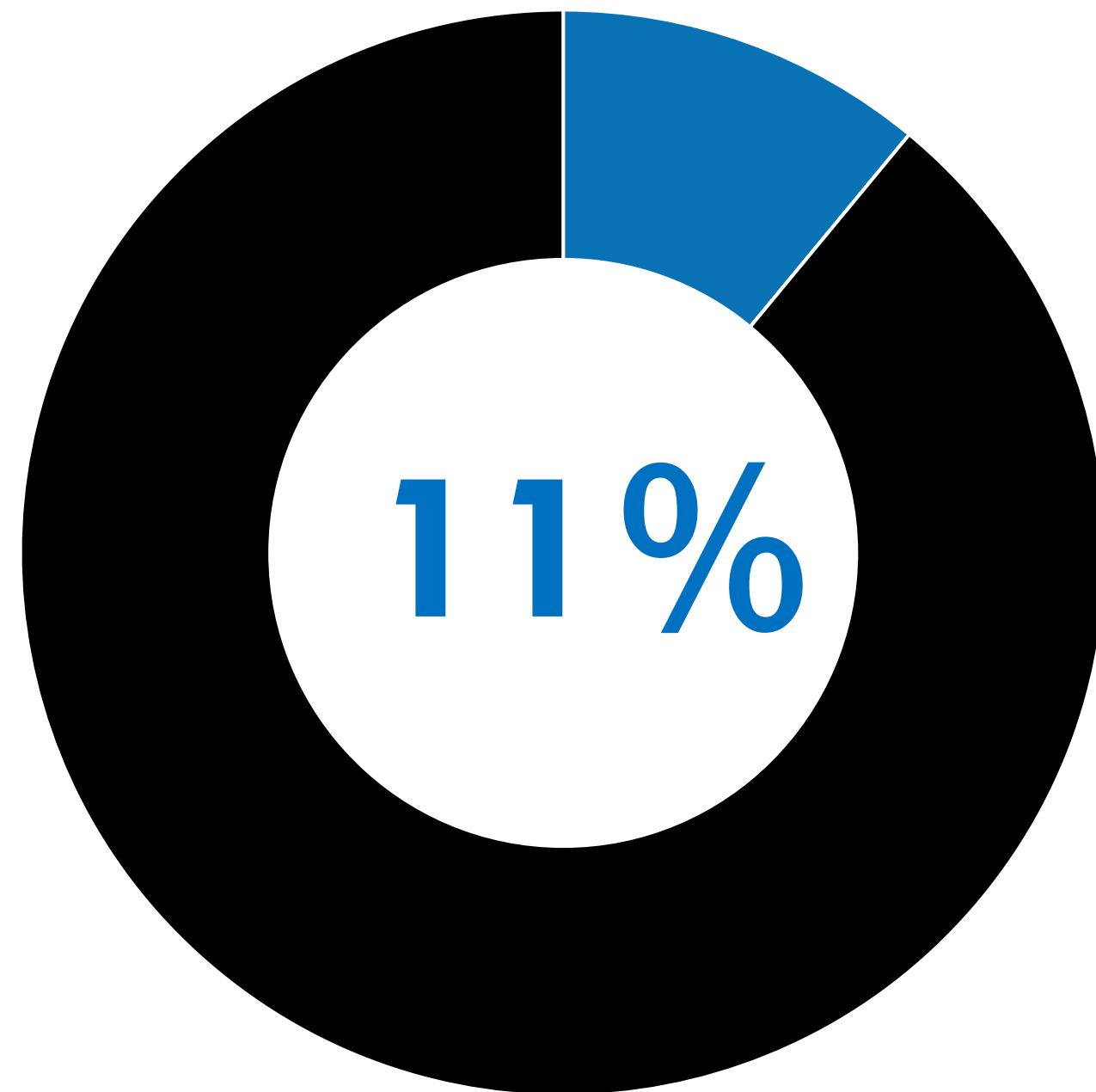
**Thinking about how 2023 will evolve,
how likely do you think each of the
following will be?**

A conceptual image for sustainability. A globe is placed on a lush forest floor covered in moss and various ferns. Sunlight filters through the trees, creating a soft, green glow. A white rectangular box with a thin border is centered over the globe, containing the text 'ISSUES RELATED TO SUSTAINABILITY' in white, bold, uppercase letters.

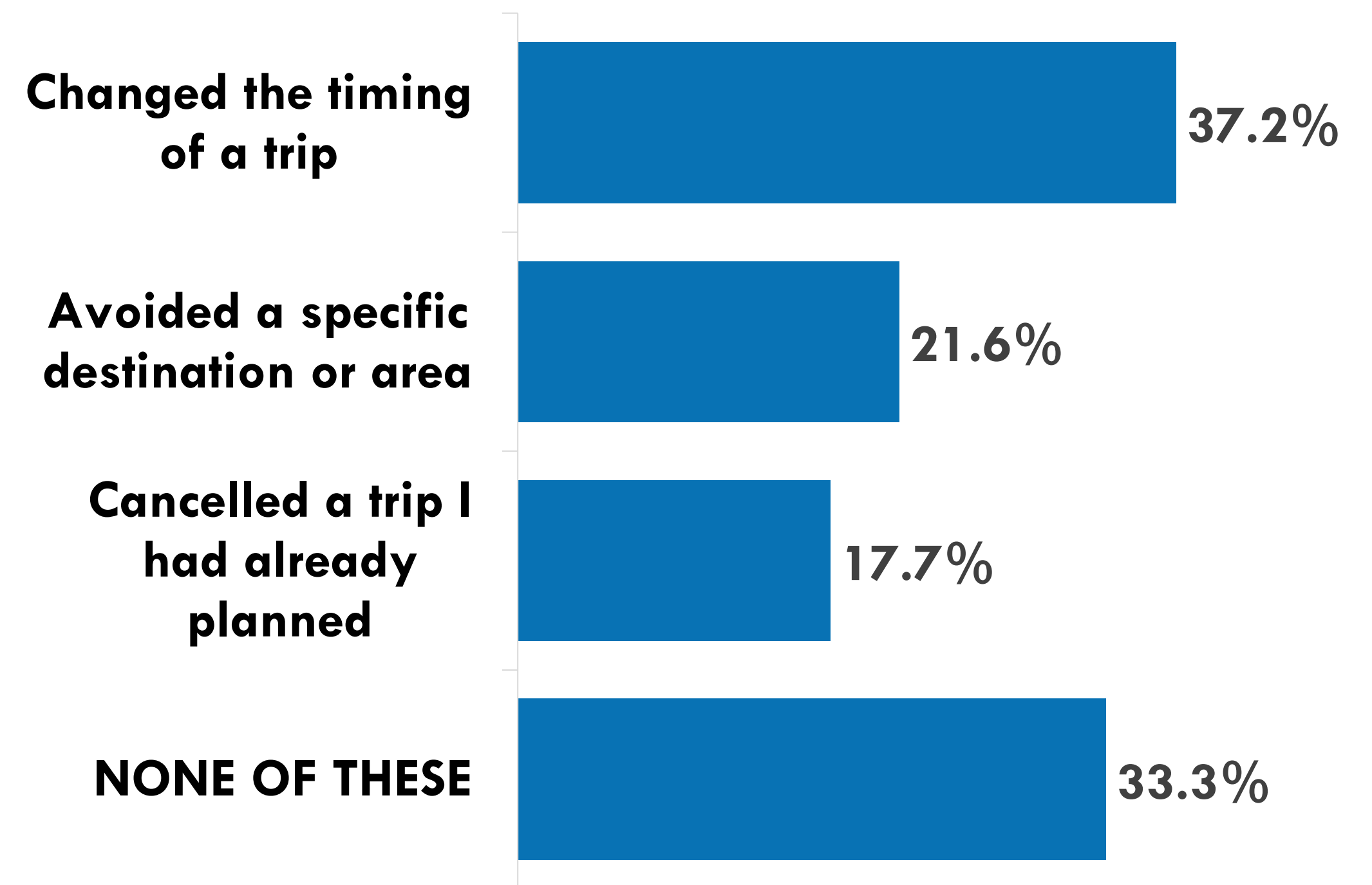
ISSUES RELATED TO SUSTAINABILITY

BACKGROUND

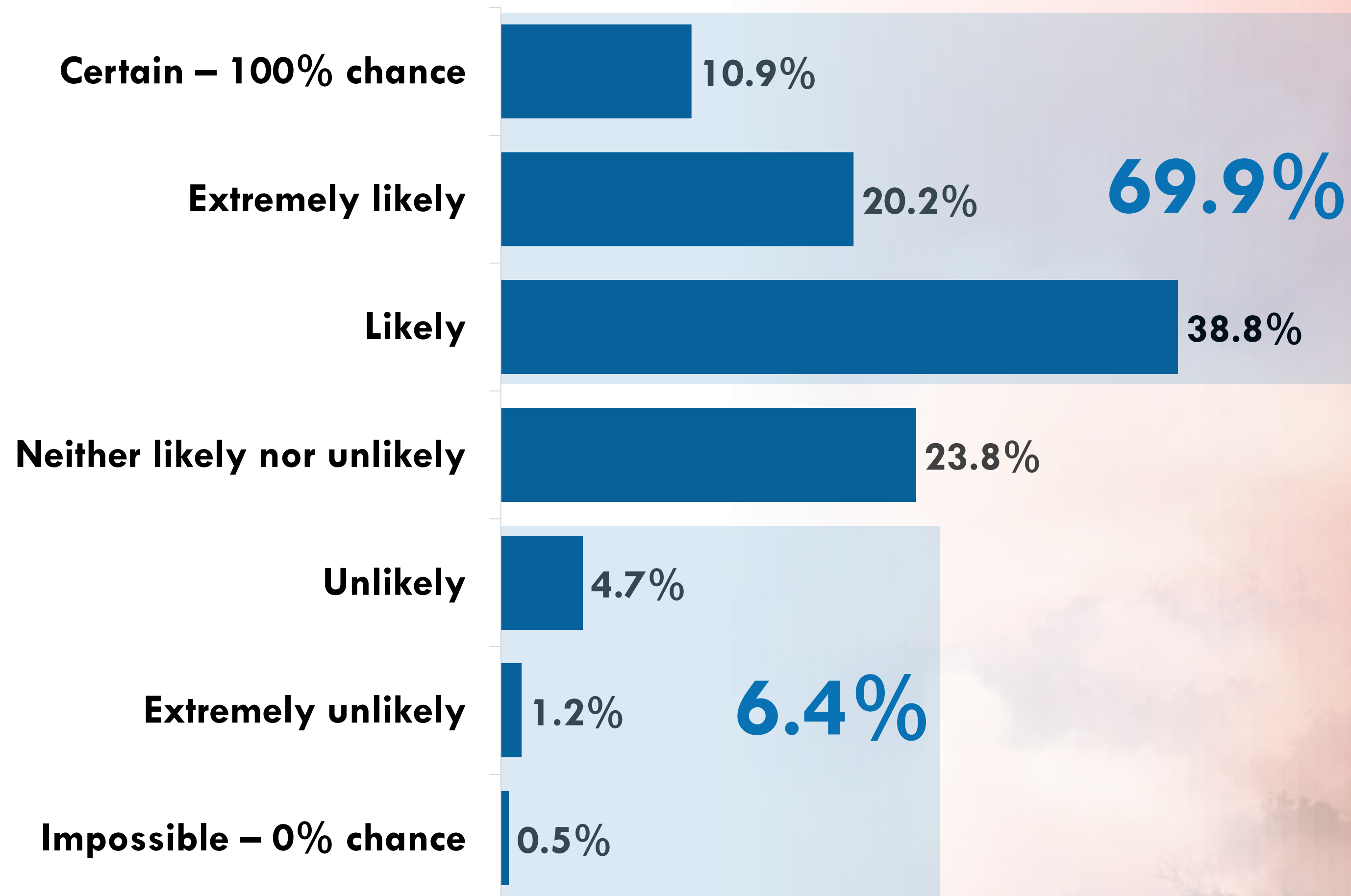
% of American travelers impacted by a natural disaster (past 12 months)



In which of these ways were your travels impacted?

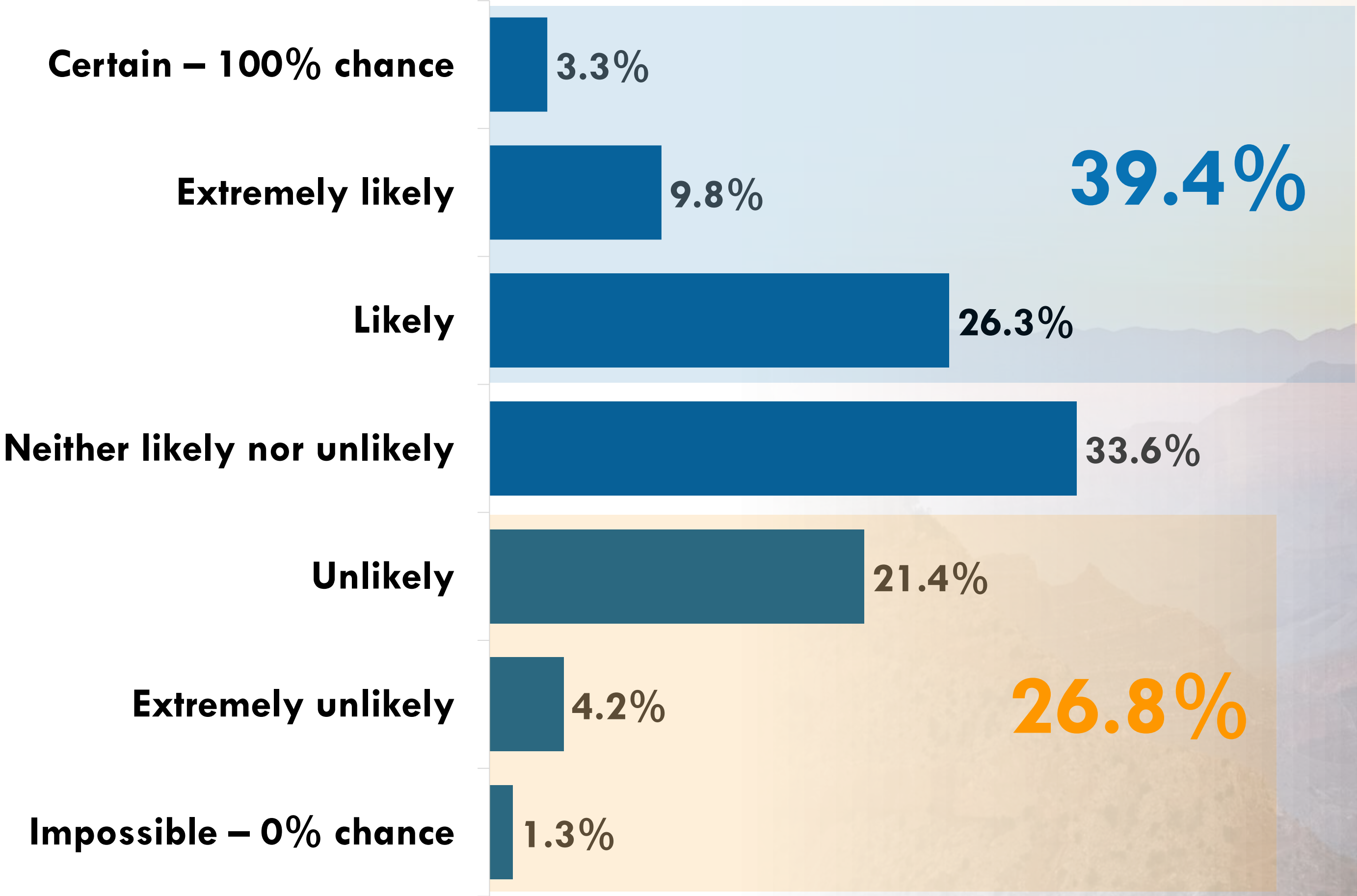


WILDFIRES WILL BE A PROBLEM IN THE WESTERN USA



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

POPULAR NATIONAL PARKS WILL BE OVER-RUN WITH TOURISTS



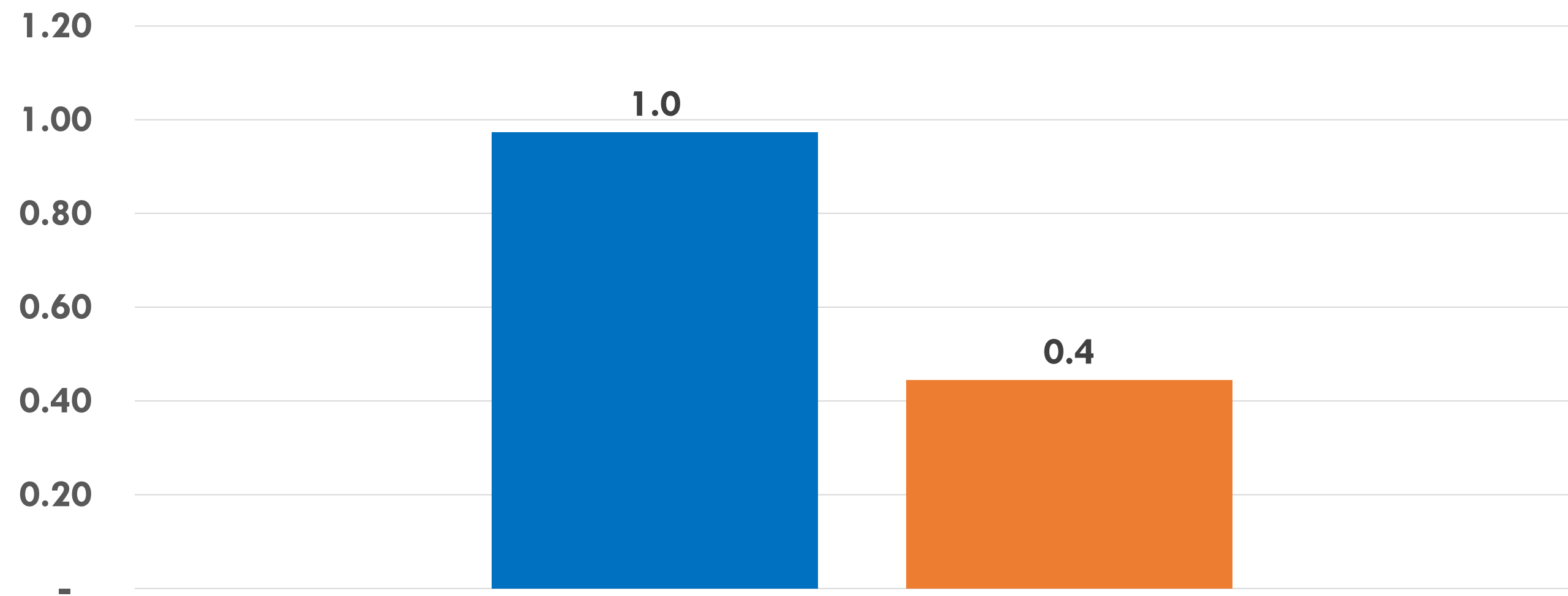
(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

POPULAR NATIONAL PARKS WILL BE OVER-RUN WITH TOURISTS

(OVER-CROWDING IS “LIKELY” VS. “UNLIKELY”)

Expected Trips That Will Include a National Park Visit (Next 12 Months)

- Over-crowding is Likely, Very likely or Certain
- Over-crowding is unlikely, very unlikely or Impossible

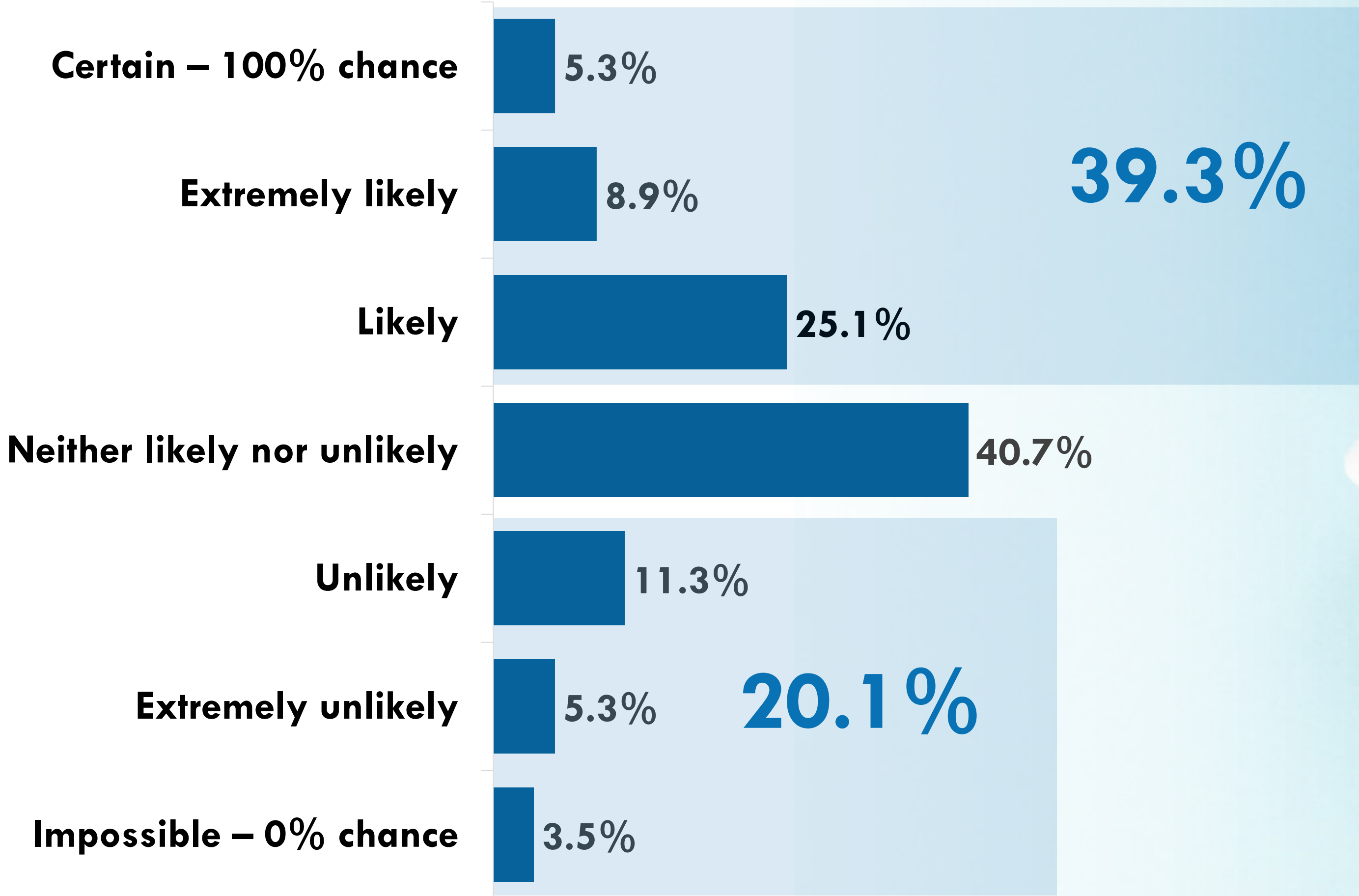


(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

The relationship between park usage and over-crowding is clear.

Park users are more concerned about this issue.

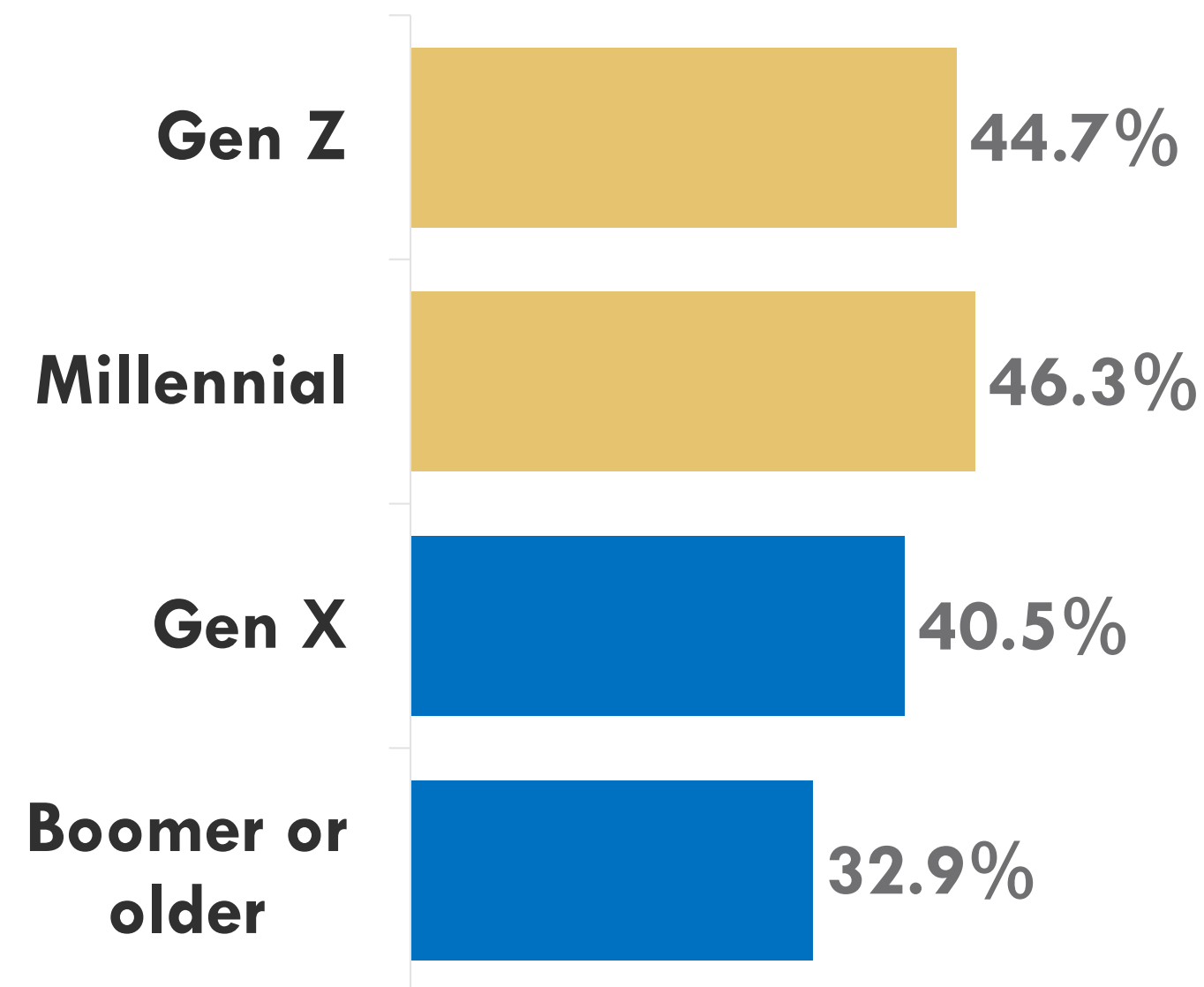
I'LL BE MORE PROACTIVE IN REDUCING THE IMPACT OF MY TRAVEL ON THE ENVIRONMENT



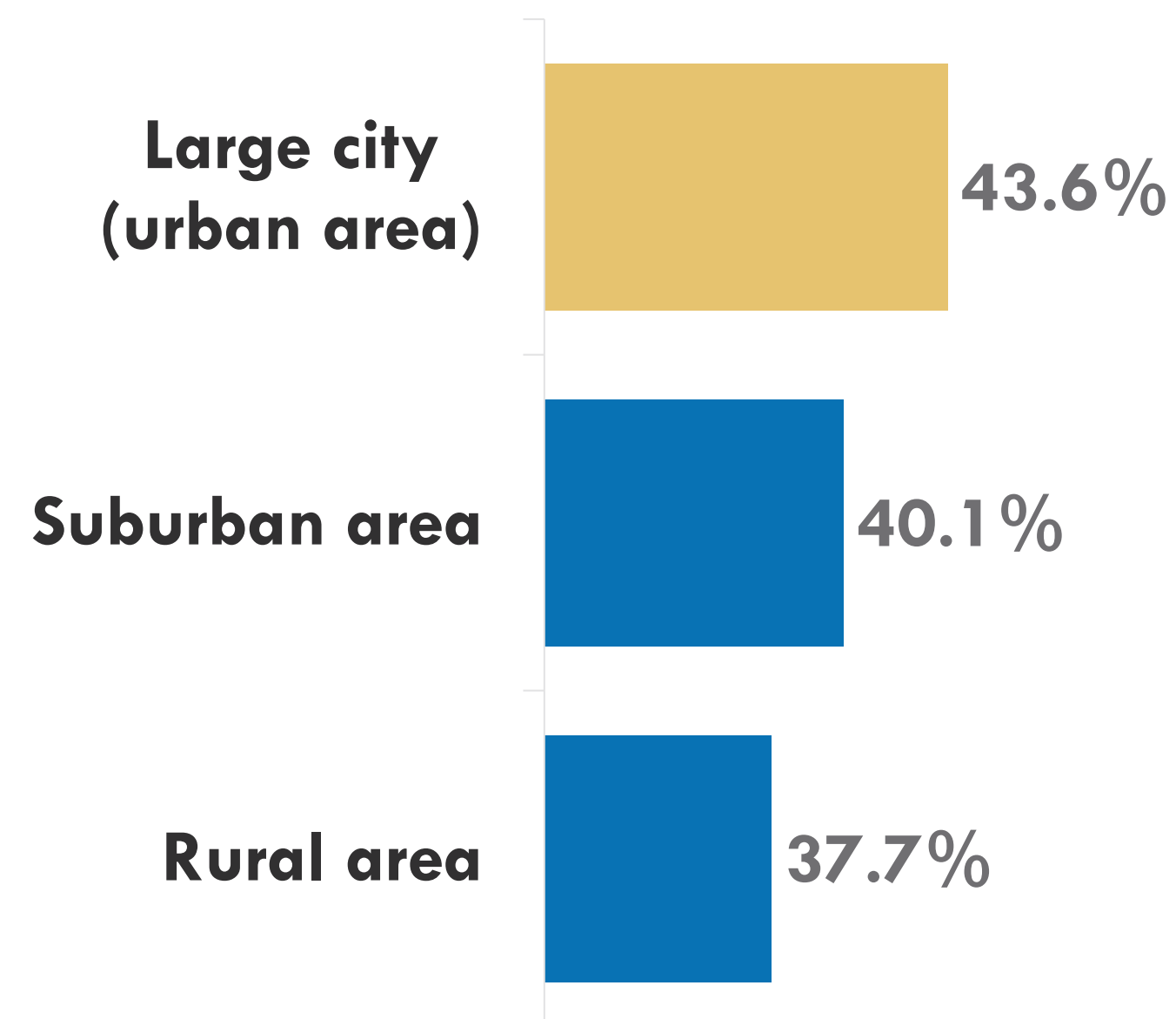
(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

I'LL BE MORE PROACTIVE IN REDUCING THE IMPACT OF MY TRAVEL ON THE ENVIRONMENT

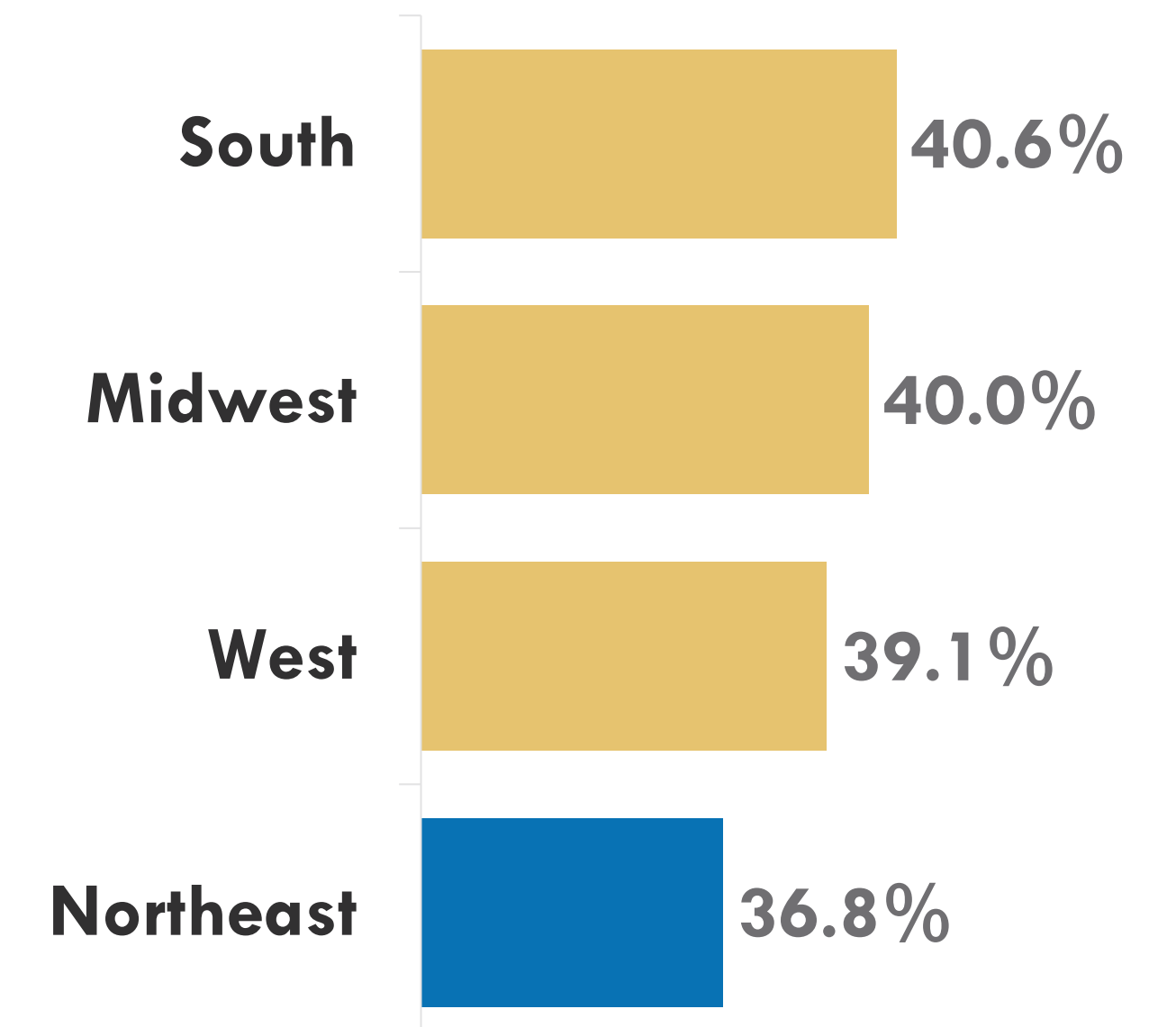
Generation



Place of Residence

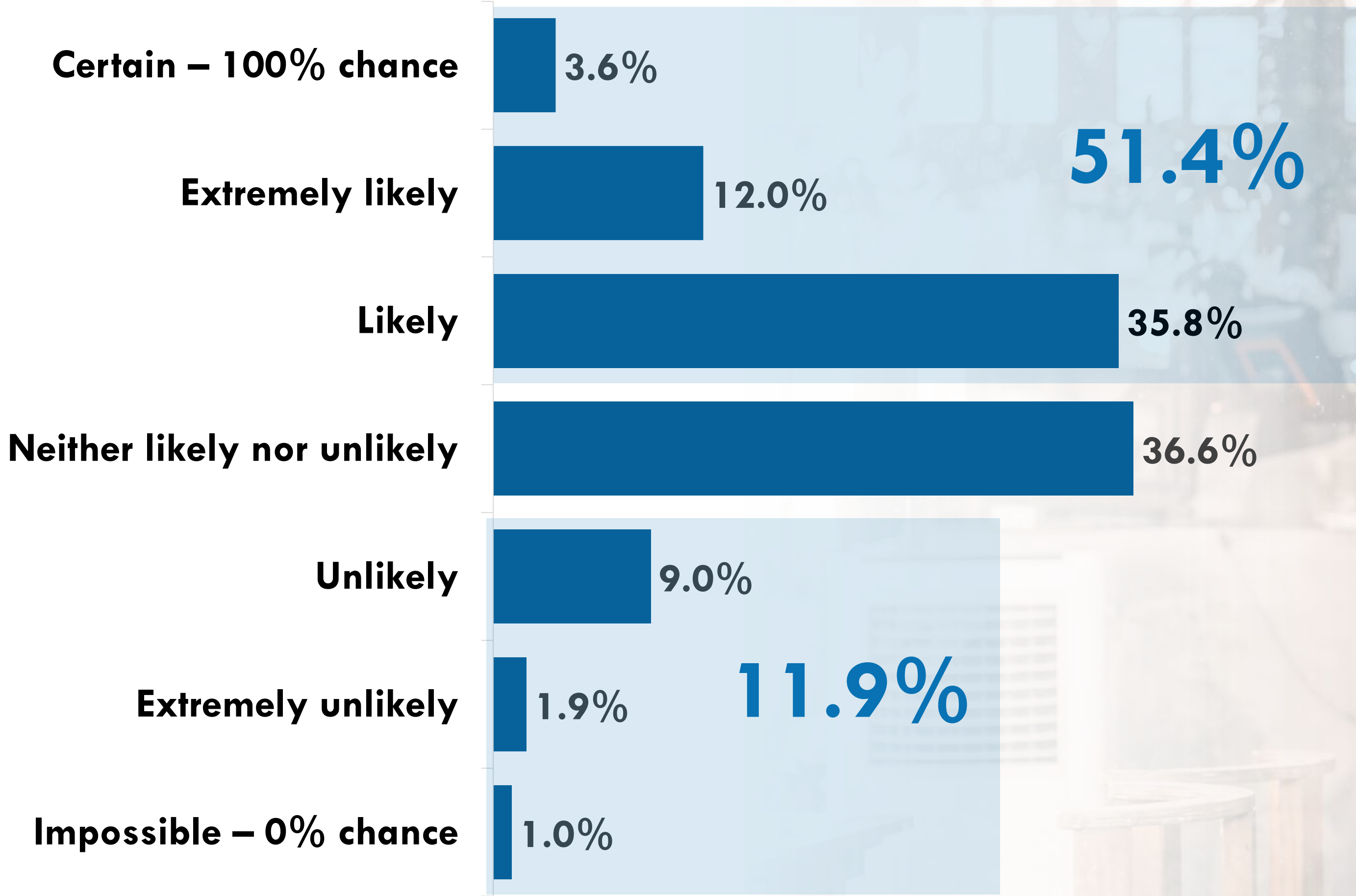


Region



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

MORE AUTHENTIC, LESS COMMERCIAL TRAVEL EXPERIENCES WILL GROW IN POPULARITY



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)



MORE ECONOMIC CONCERNS



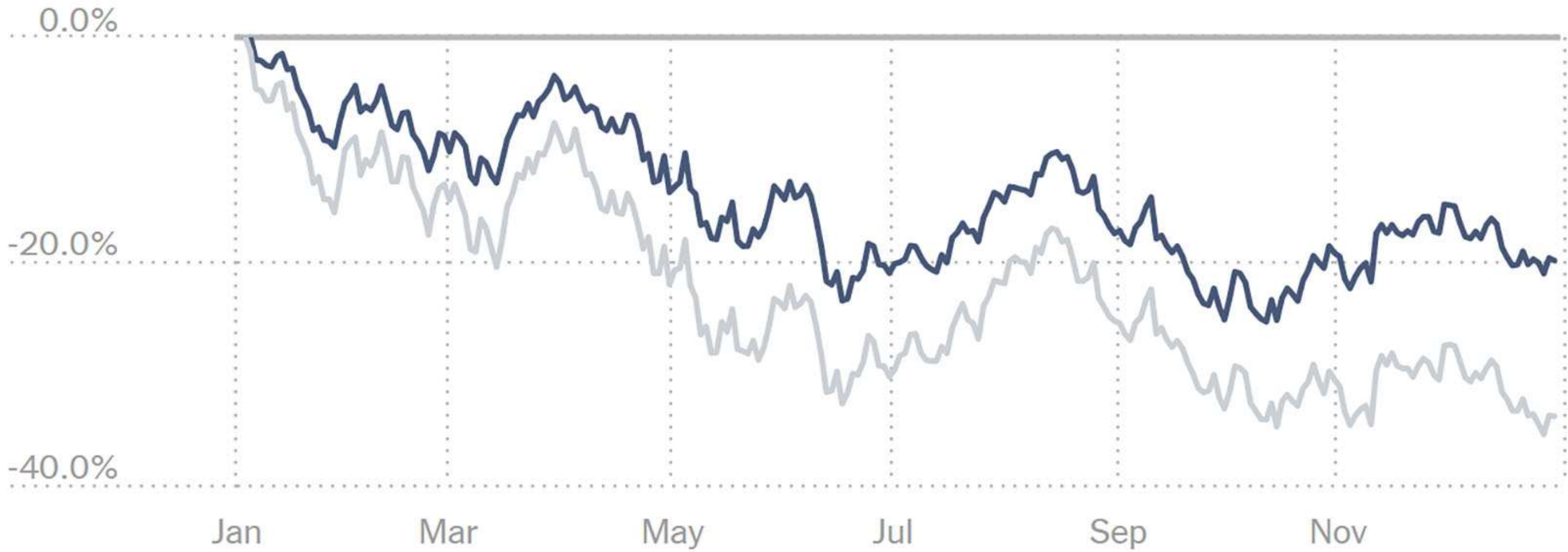
U.S. MARKETS

1 YEAR

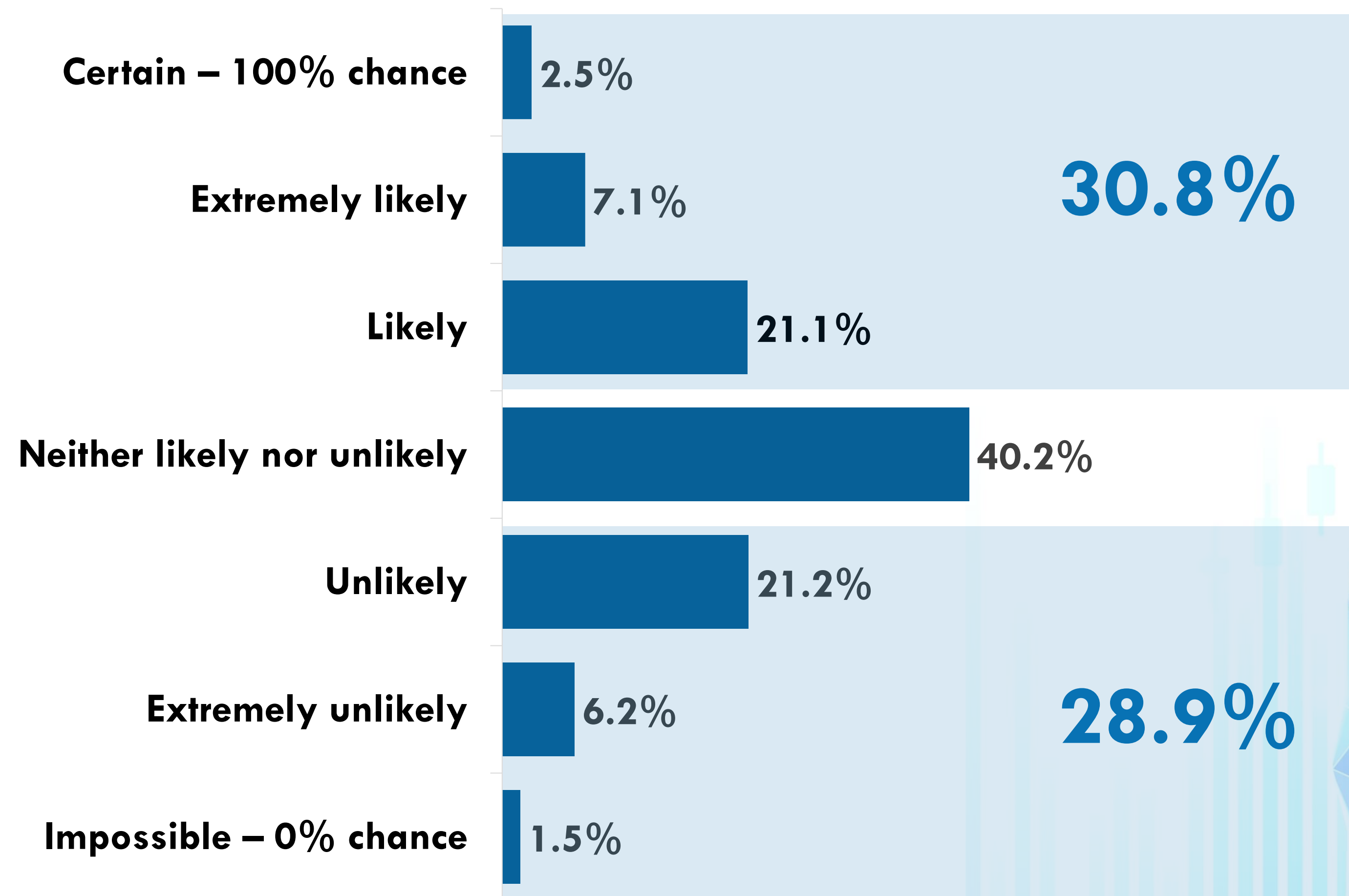
S&P 500 **Nasdaq Composite Index**

Last **3,839.50**

Last **10,466.48**

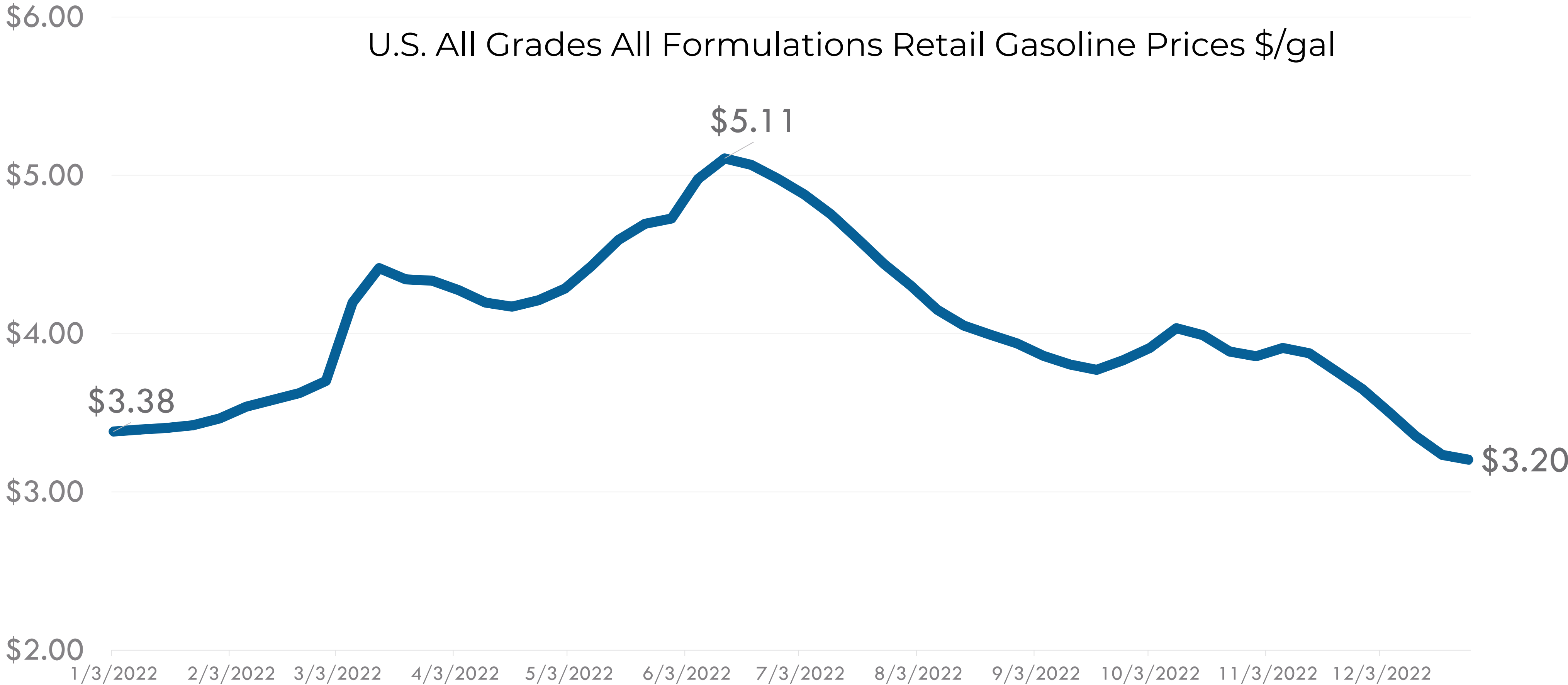


THE US STOCK MARKET WILL ENTER A BULL MARKET (I.E., STOCK PRICES WILL RISE STRONGLY)



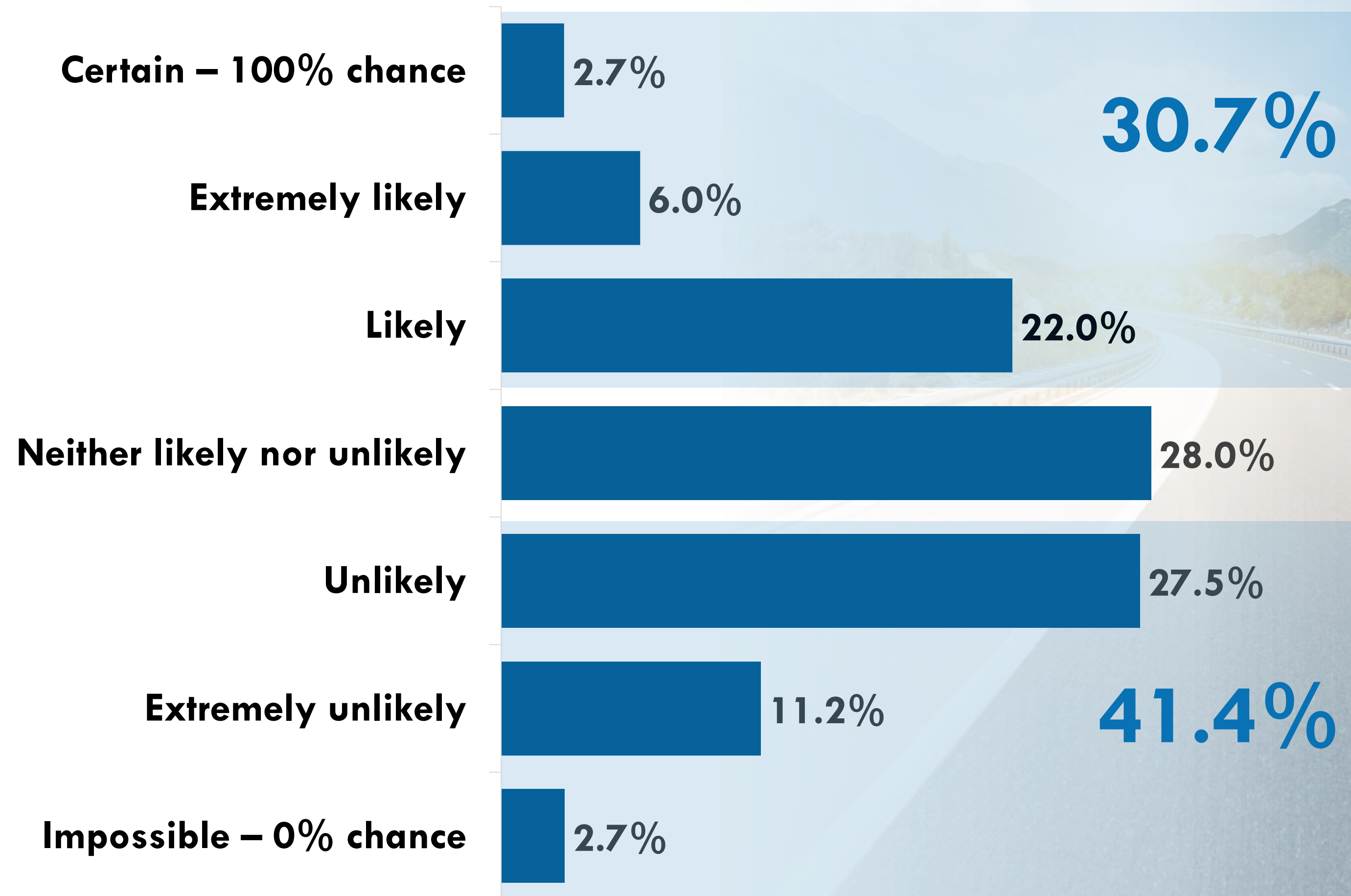
(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

WEEKLY RETAIL GASOLINE PRICES



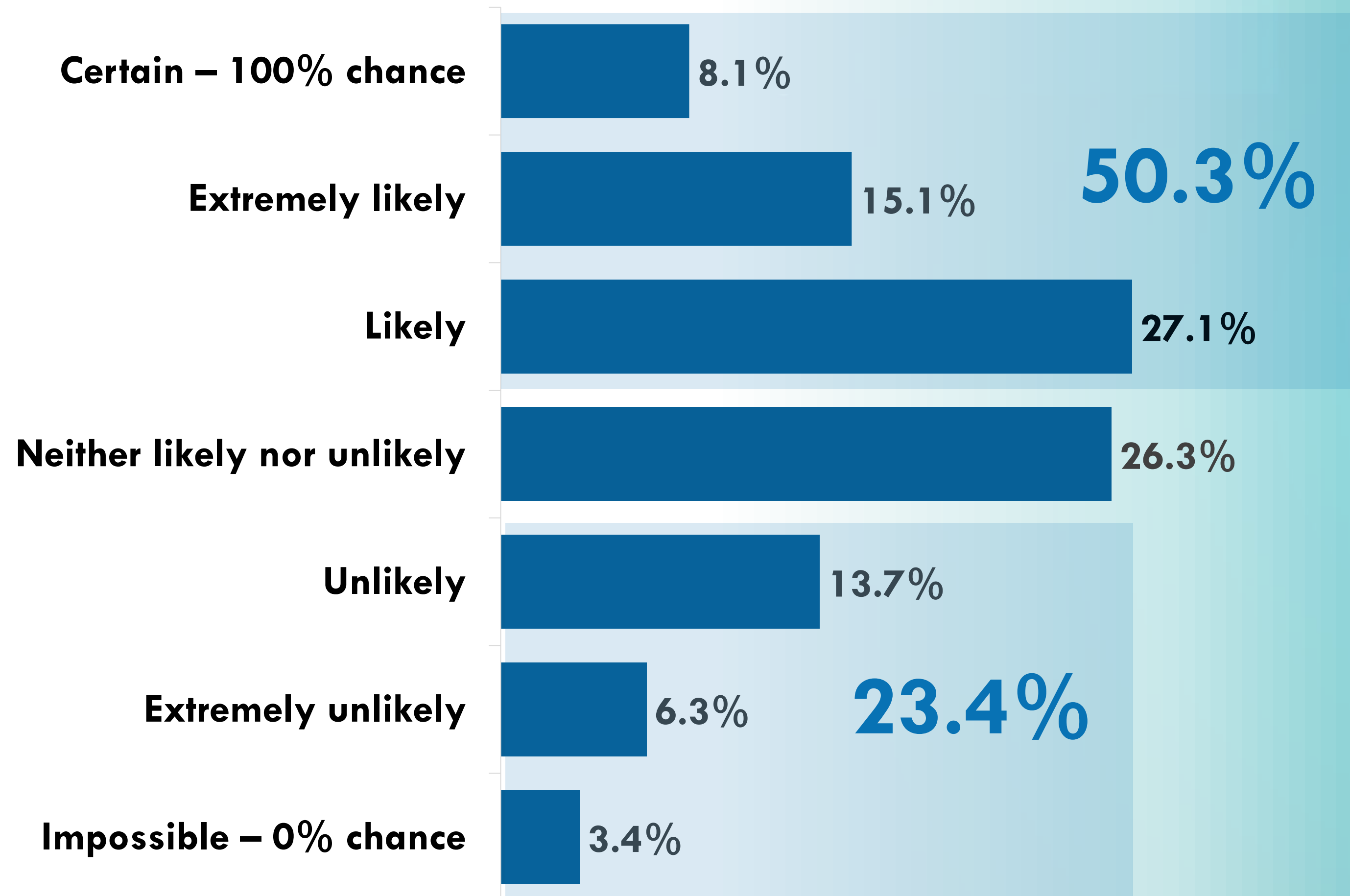
Source: U.S. Energy Information Administration

GASOLINE PRICES WILL FALL SIGNIFICANTLY DURING THE YEAR



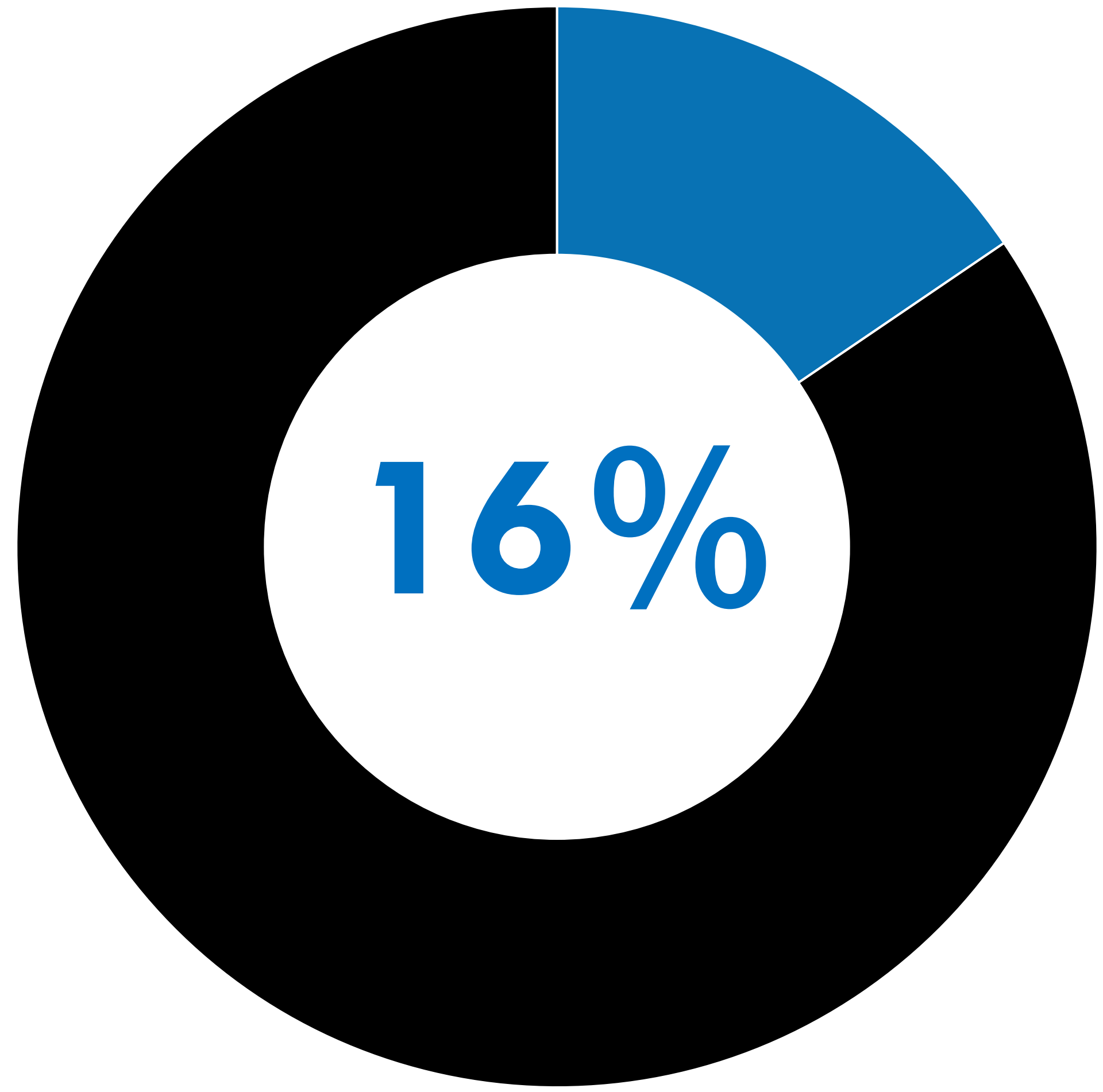
(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

INTEREST IN INVESTING IN CRYPTOCURRENCIES WILL DECREASE





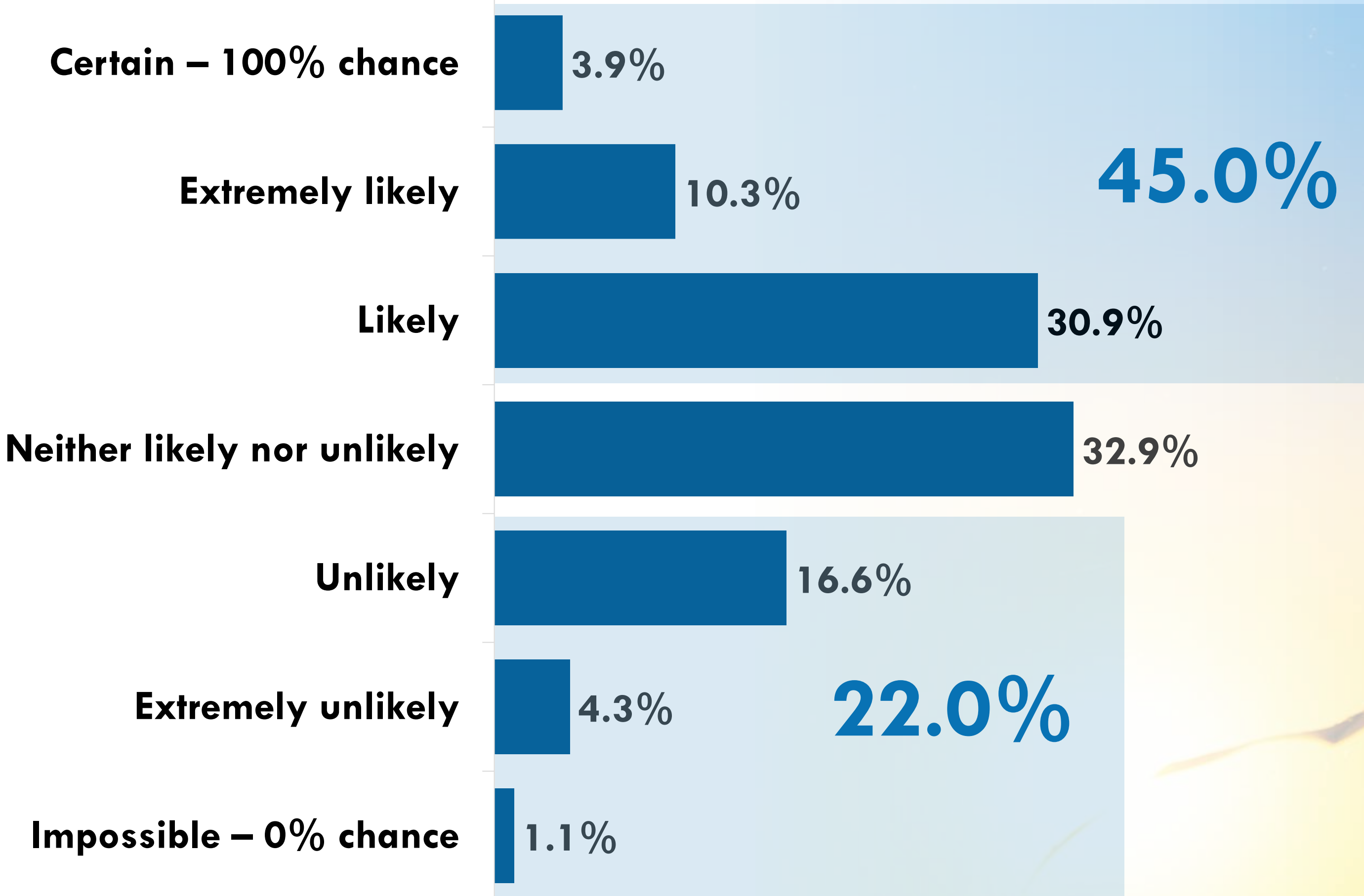
Would like travel companies to accept payment in cryptocurrency



The image features two hands, one from the top left and one from the bottom right, reaching towards each other. The background is a soft, blurred sunset or sunrise with warm orange and yellow tones. A semi-transparent grey rectangular box with a white border is centered horizontally, containing the text 'WAR & PEACE' in white, bold, uppercase letters.

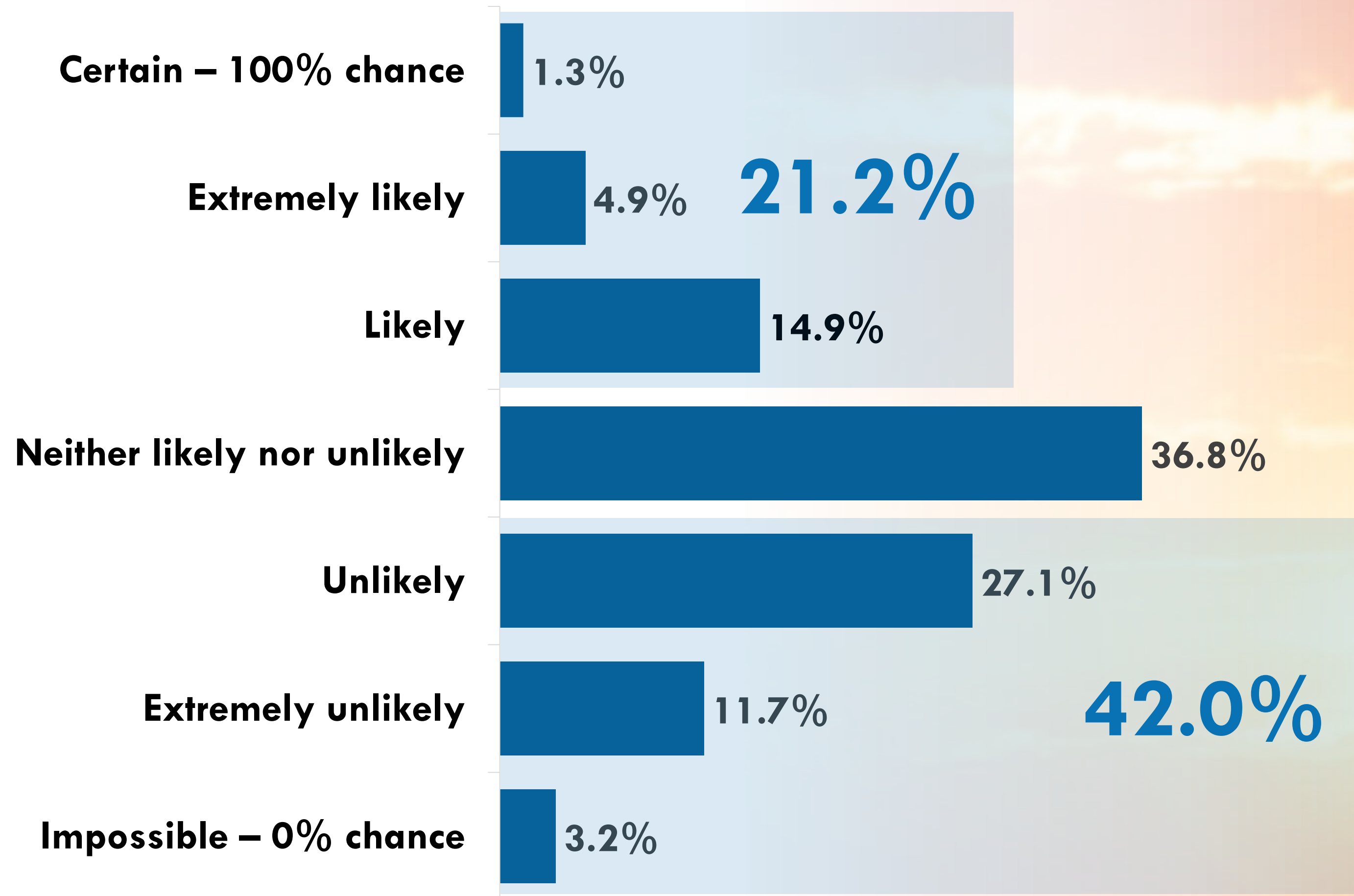
WAR & PEACE

THE WAR BETWEEN UKRAINE AND RUSSIA WILL EXPAND INTO OTHER COUNTRIES



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

AMERICA WILL BE PULLED INTO A WAR IN ASIA

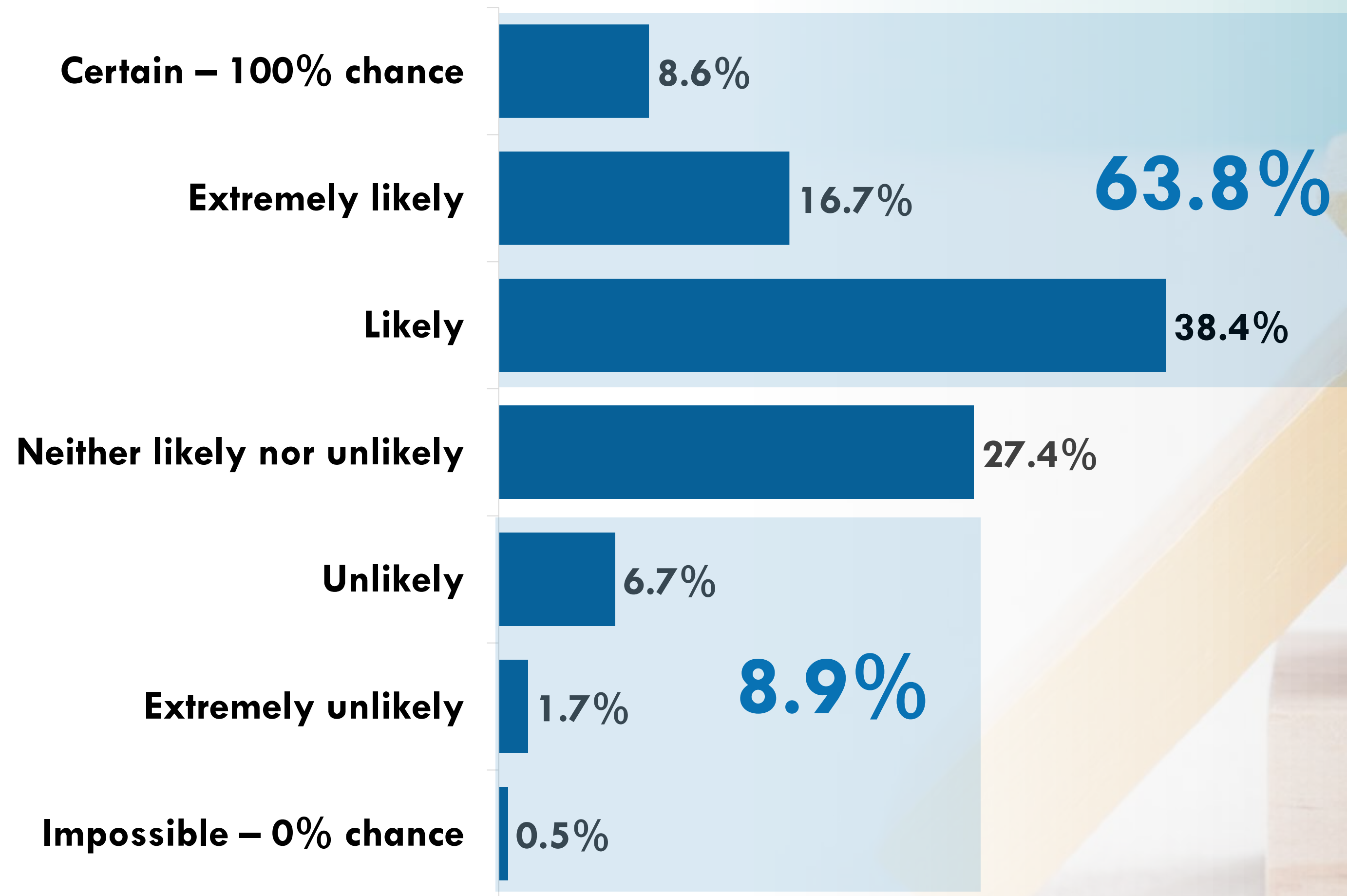


(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

A woman with dark, curly hair is sitting on a large, layered rock formation in a desert landscape. She is wearing a blue jacket, light-colored pants, and red sneakers. In the background, several hot air balloons are floating in a clear blue sky with scattered white clouds. The overall scene is bright and scenic, suggesting a travel or adventure theme.

TRAVEL INDUSTRY PERFORMANCE

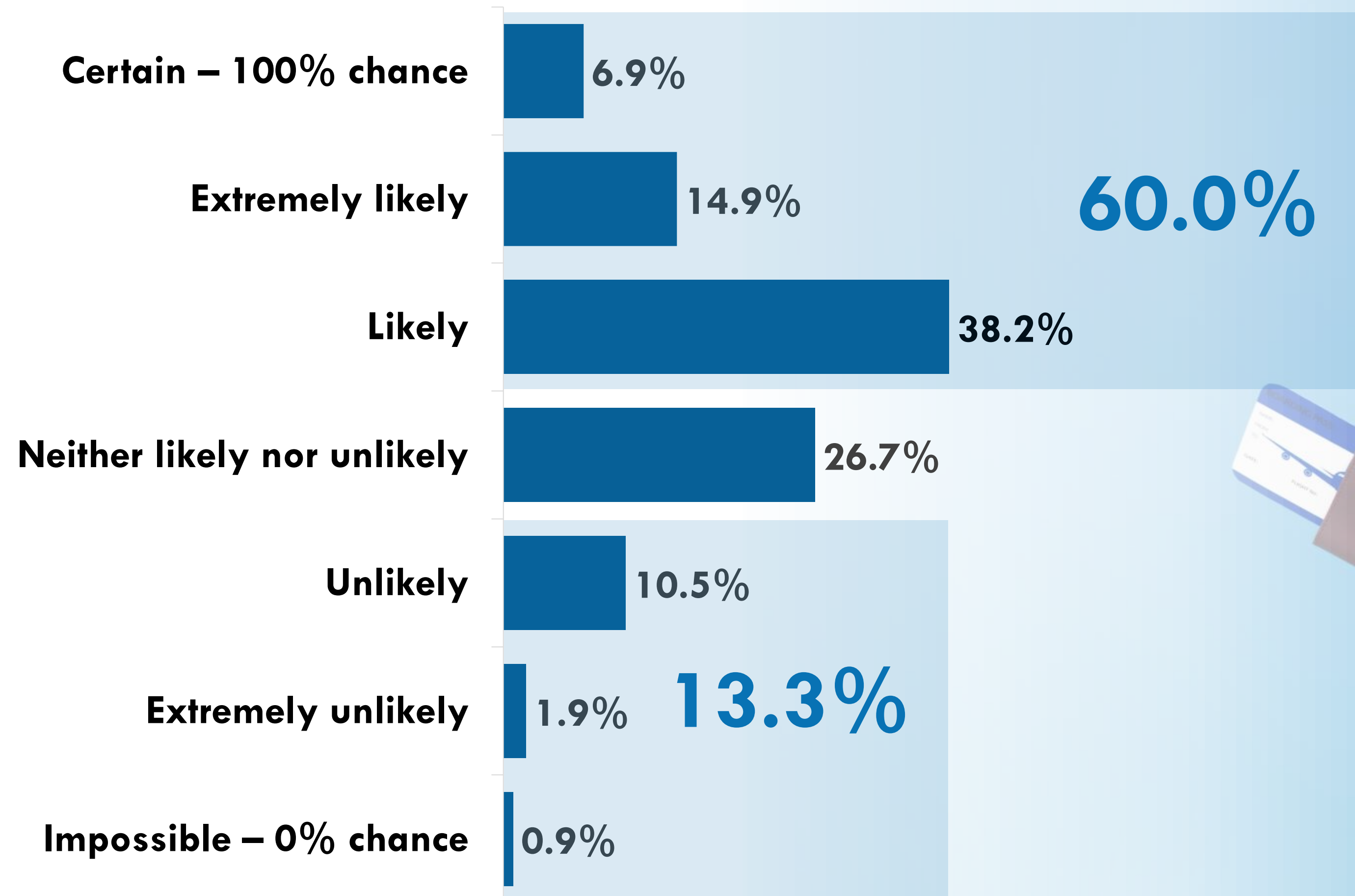
PRICE GOUGING WILL BECOME MORE COMMON IN THE TRAVEL INDUSTRY



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

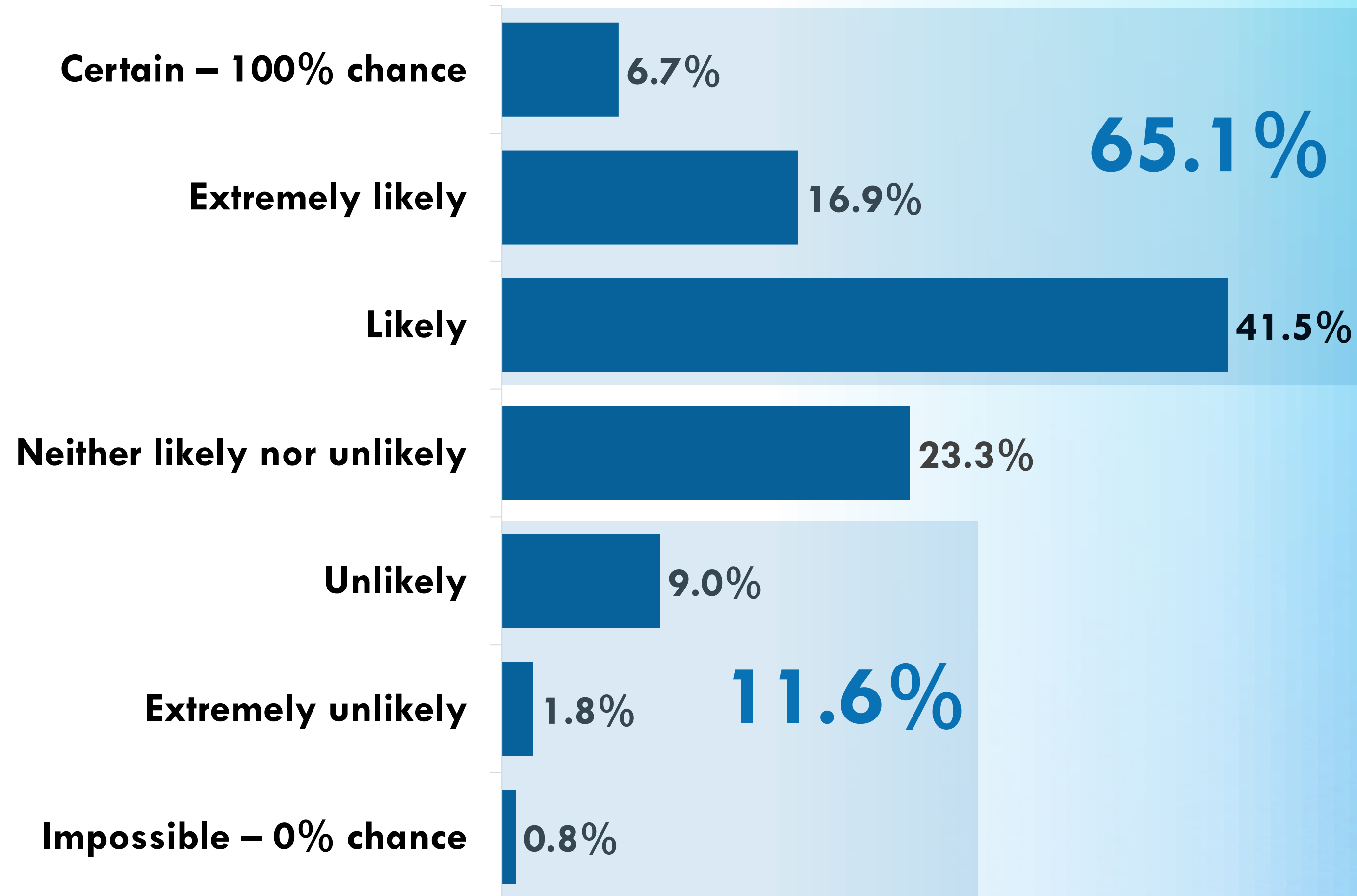
DOMESTIC TRAVEL WILL BECOME GENERALLY MORE FRUSTRATING

(E.G., AIR TRAVEL BREAKDOWNS, POOR CUSTOMER SERVICE, ETC.)

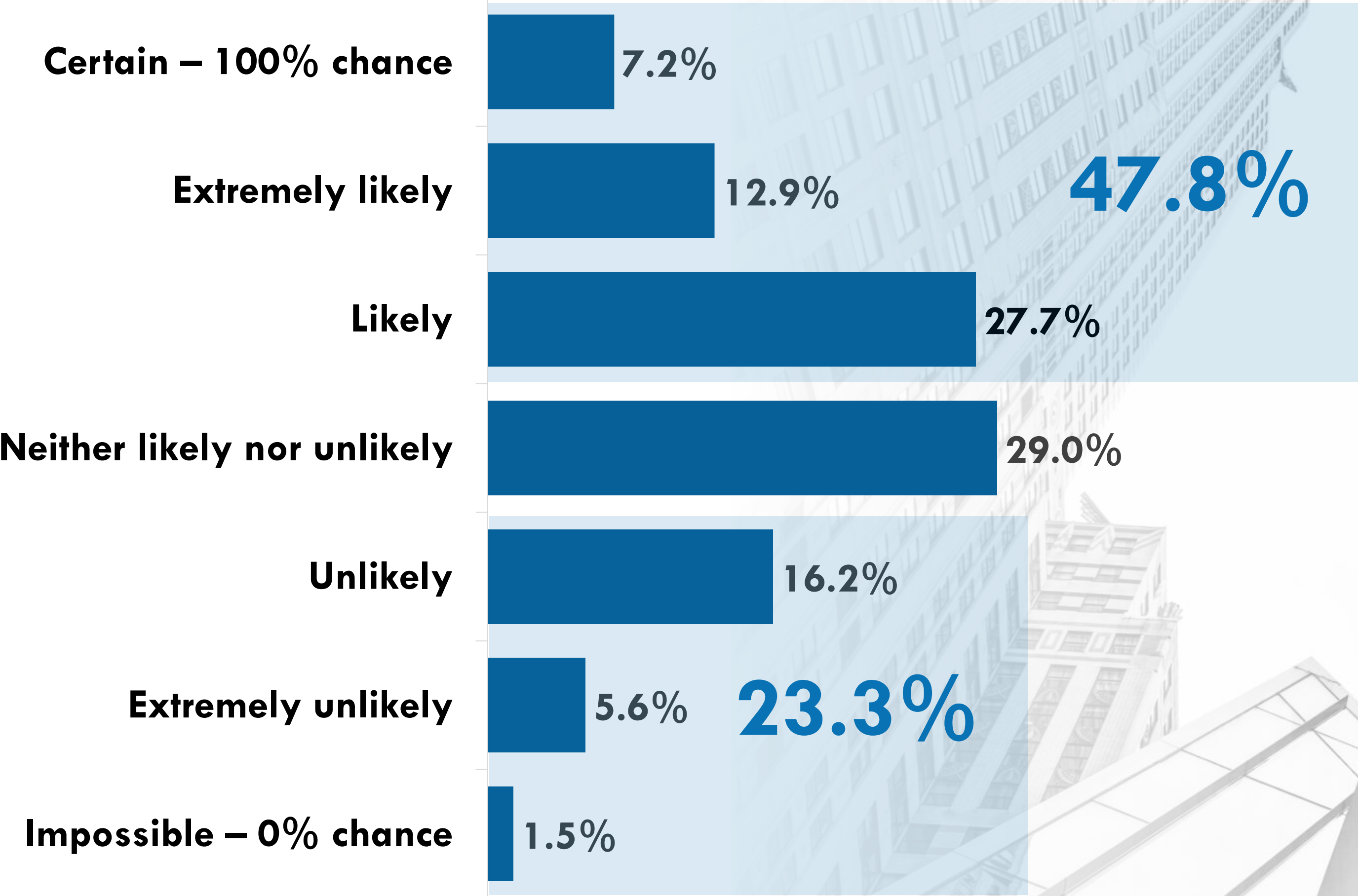


(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

LABOR SHORTAGES WILL BE A PROBLEM FOR THE TRAVEL INDUSTRY

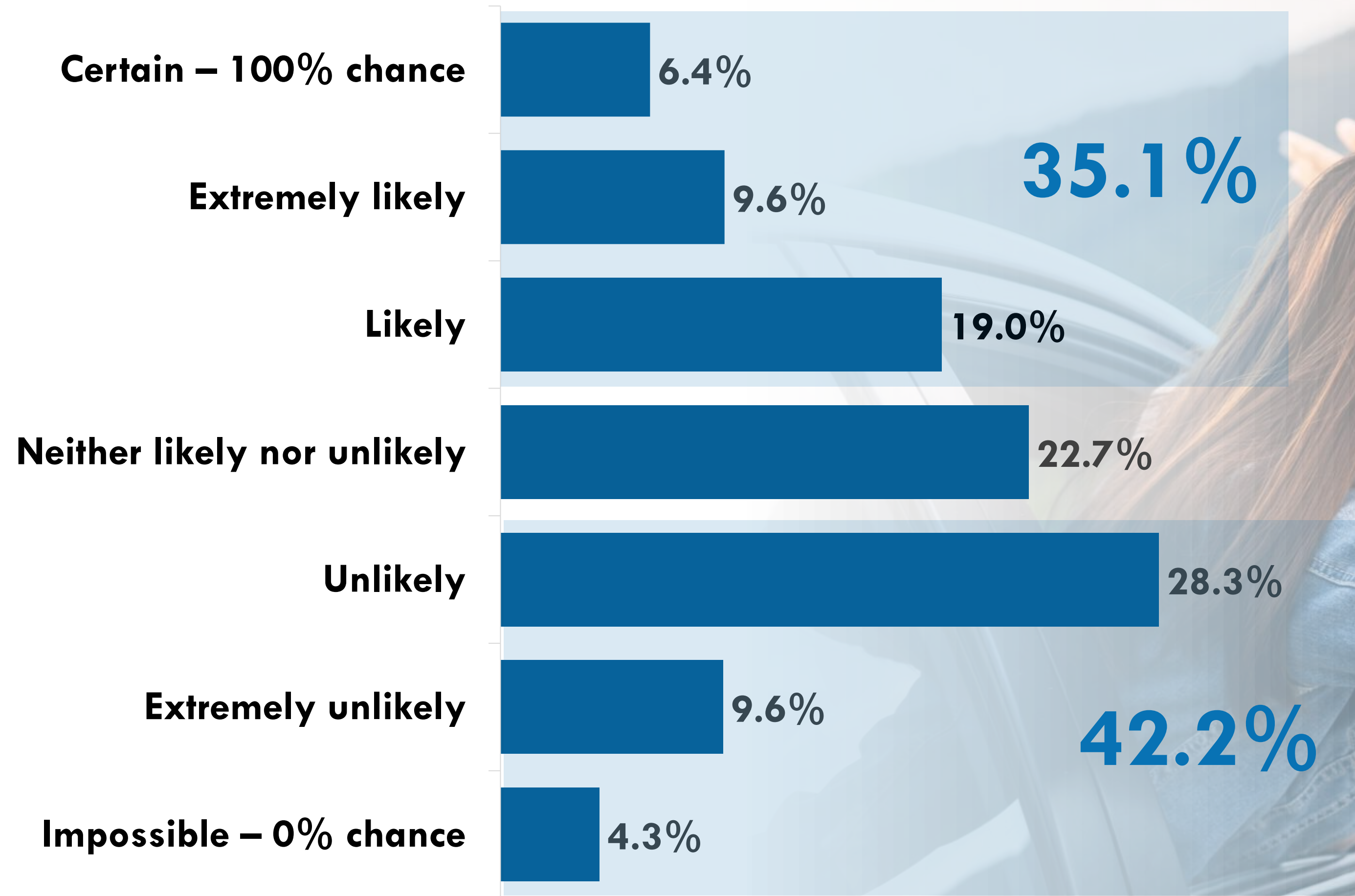


AMERICAN CITIES WILL BECOME MORE DANGEROUS AND UNMANAGEABLE PLACES TO VISIT



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

COVID-19 WILL BE LARGELY A THING OF THE PAST



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

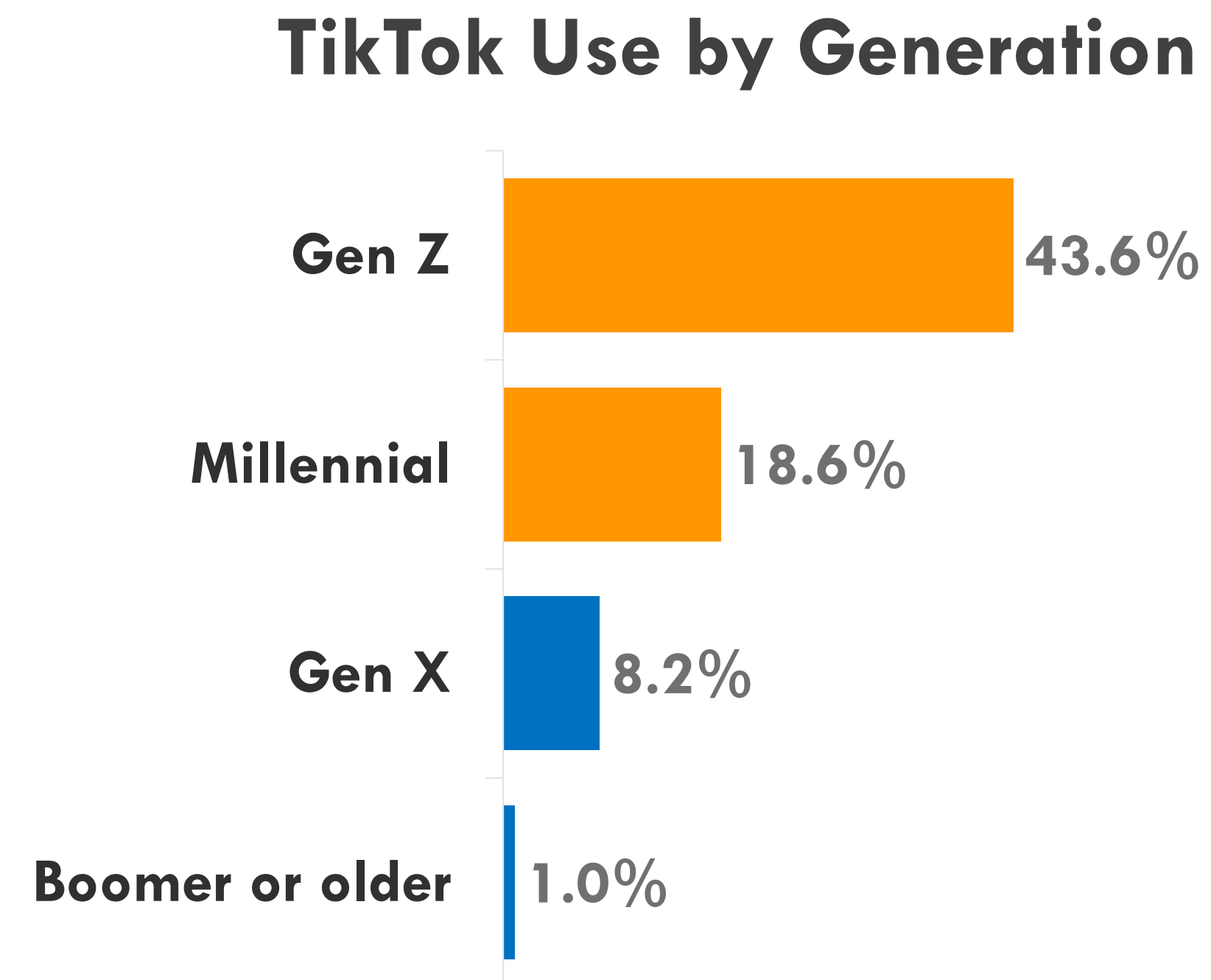
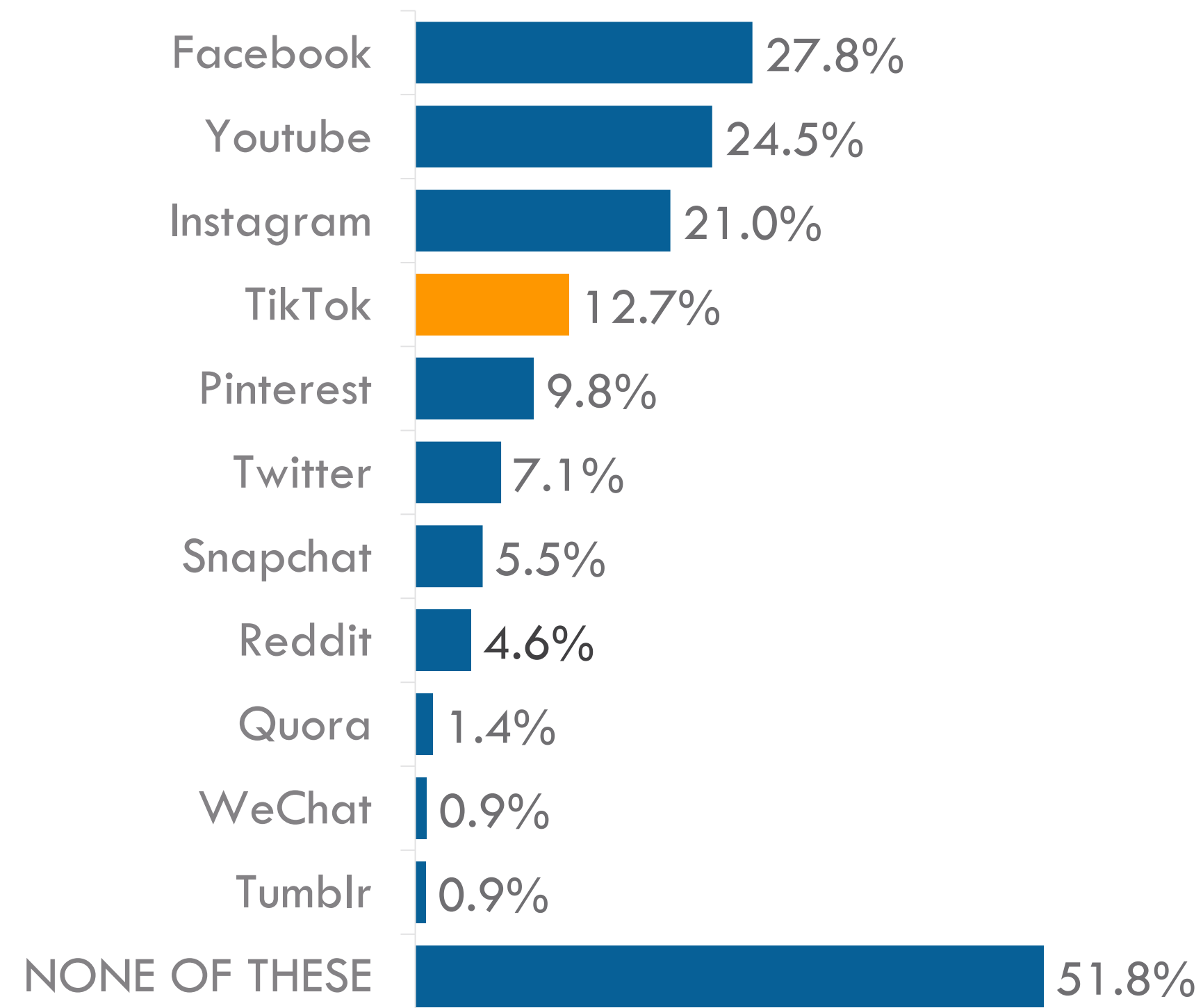


TRAVEL PLANNING



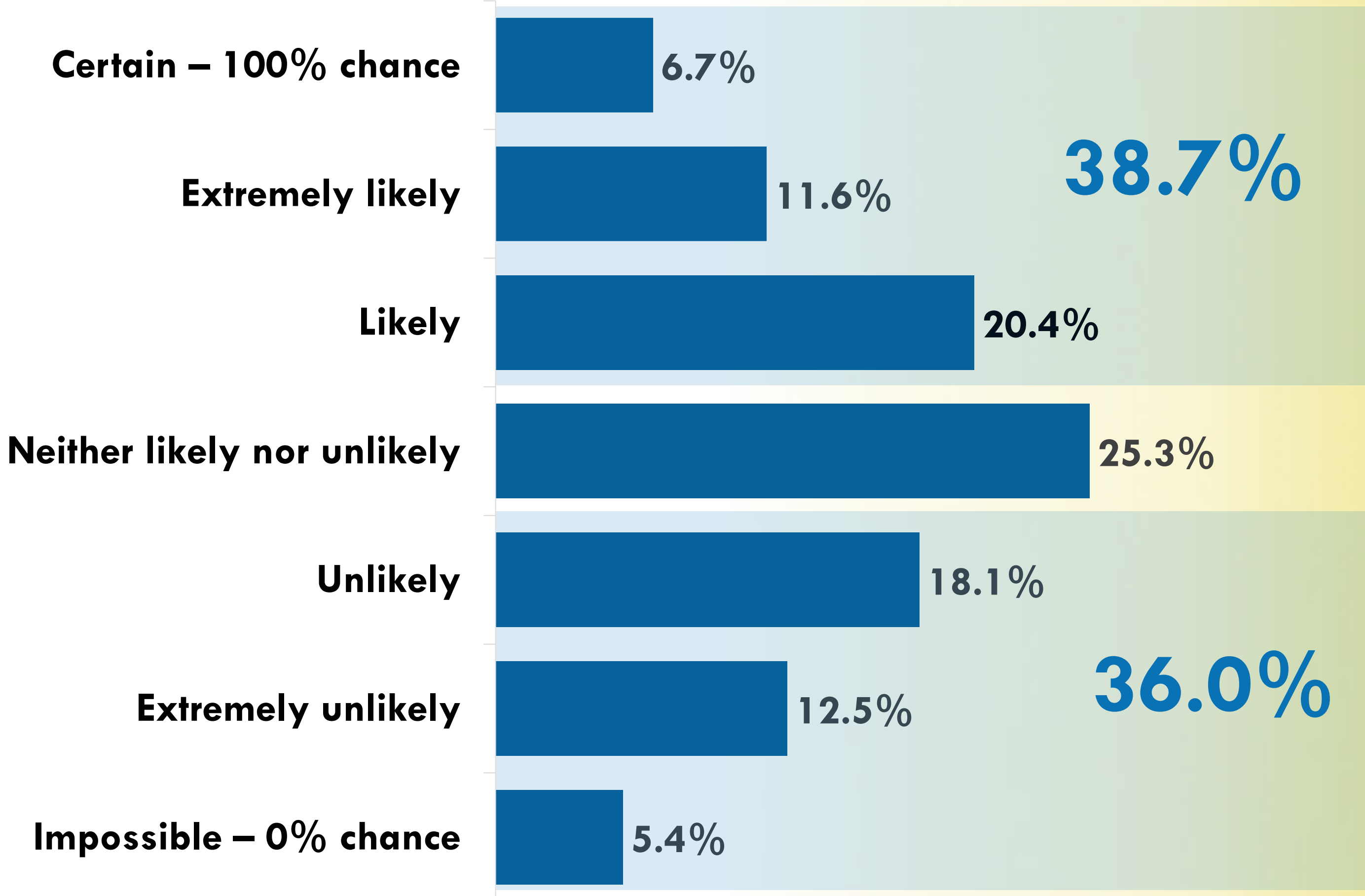
BACKGROUND

Question: In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS?



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

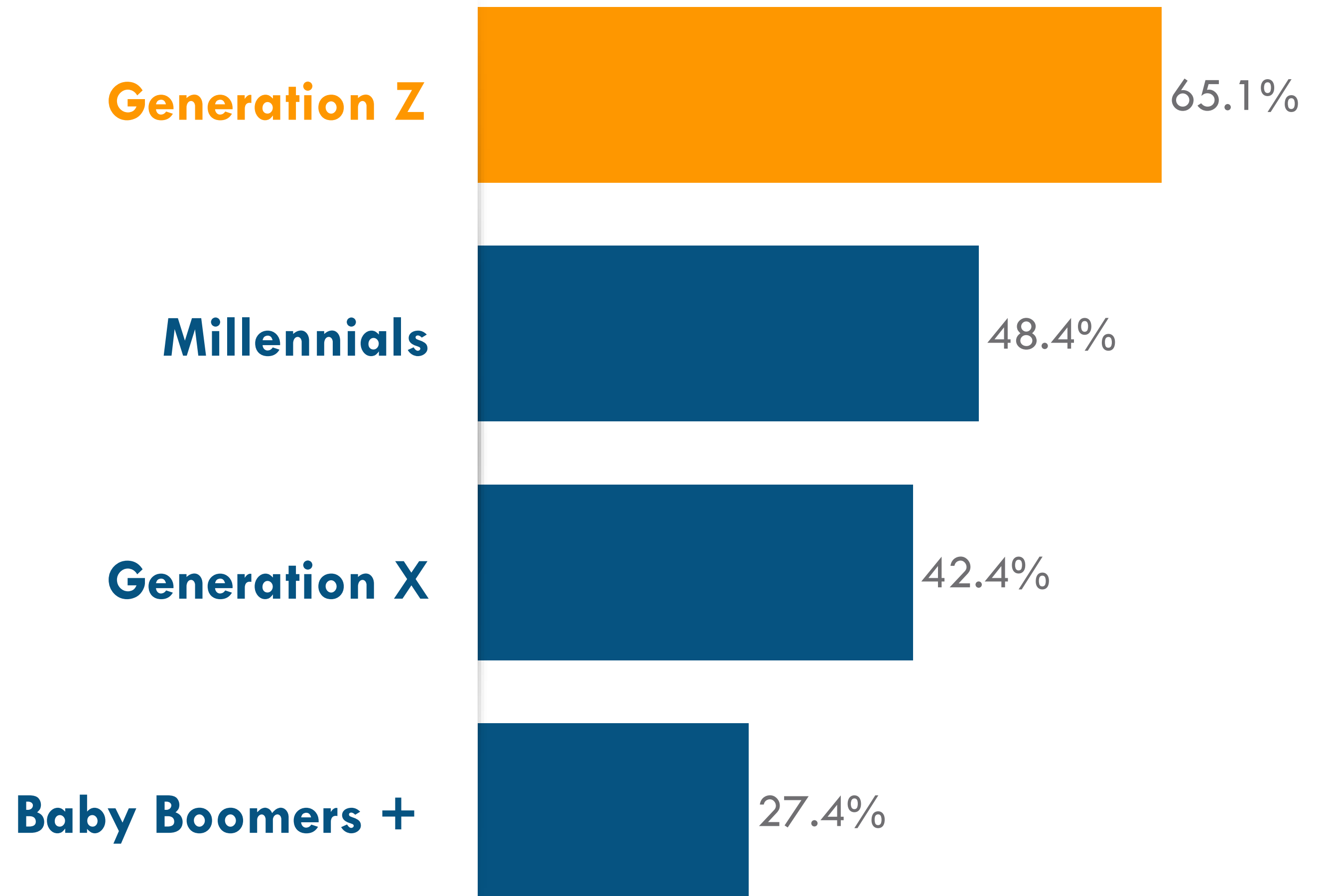
TIKTOK WILL BECOME AMERICA'S MOST POPULAR SOCIAL MEDIA CHANNEL



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

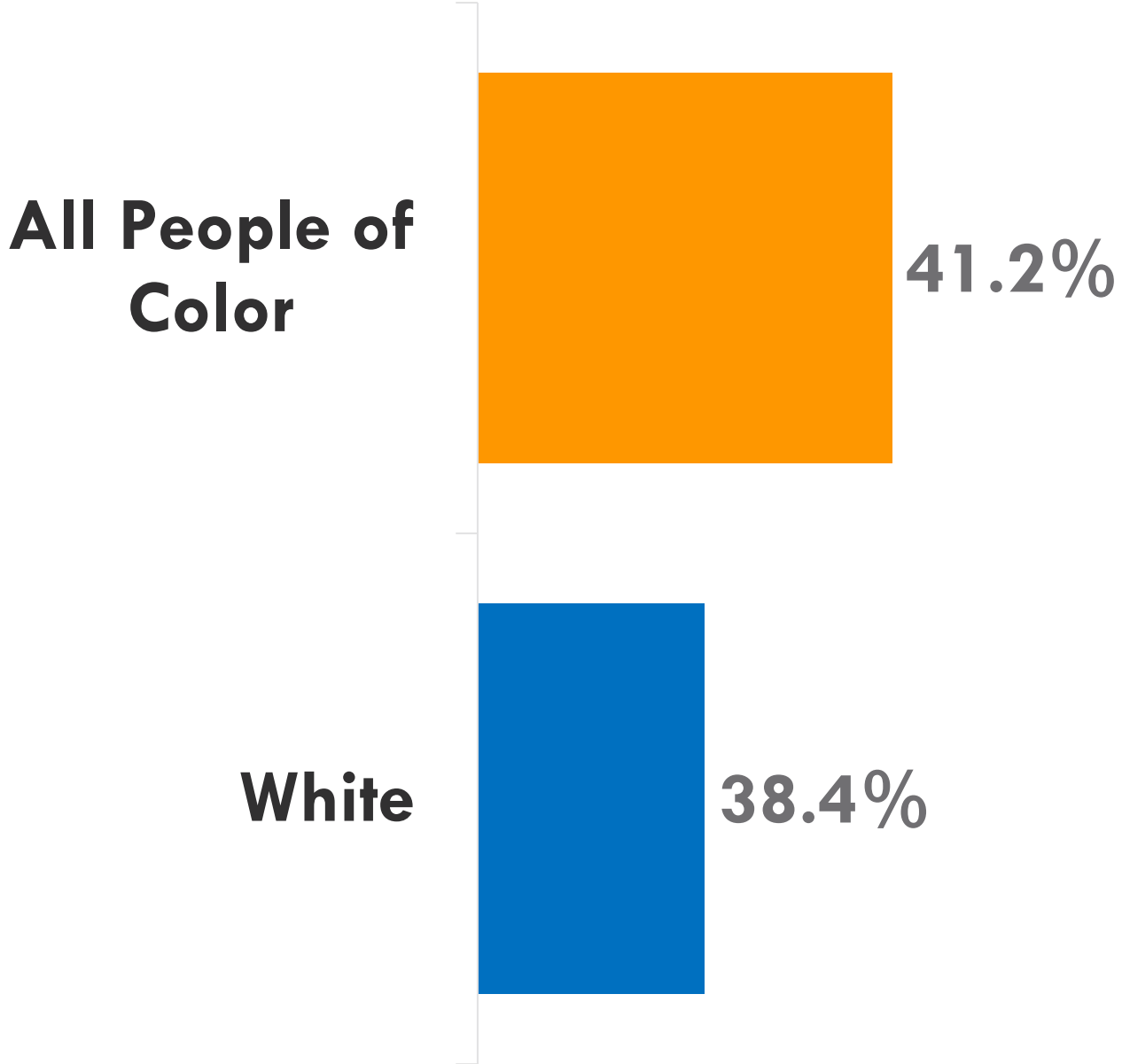
**TIKTOK WILL
BECOME AMERICA'S
MOST POPULAR
SOCIAL MEDIA
CHANNEL**

% WHO SAY THIS IS LIKELY

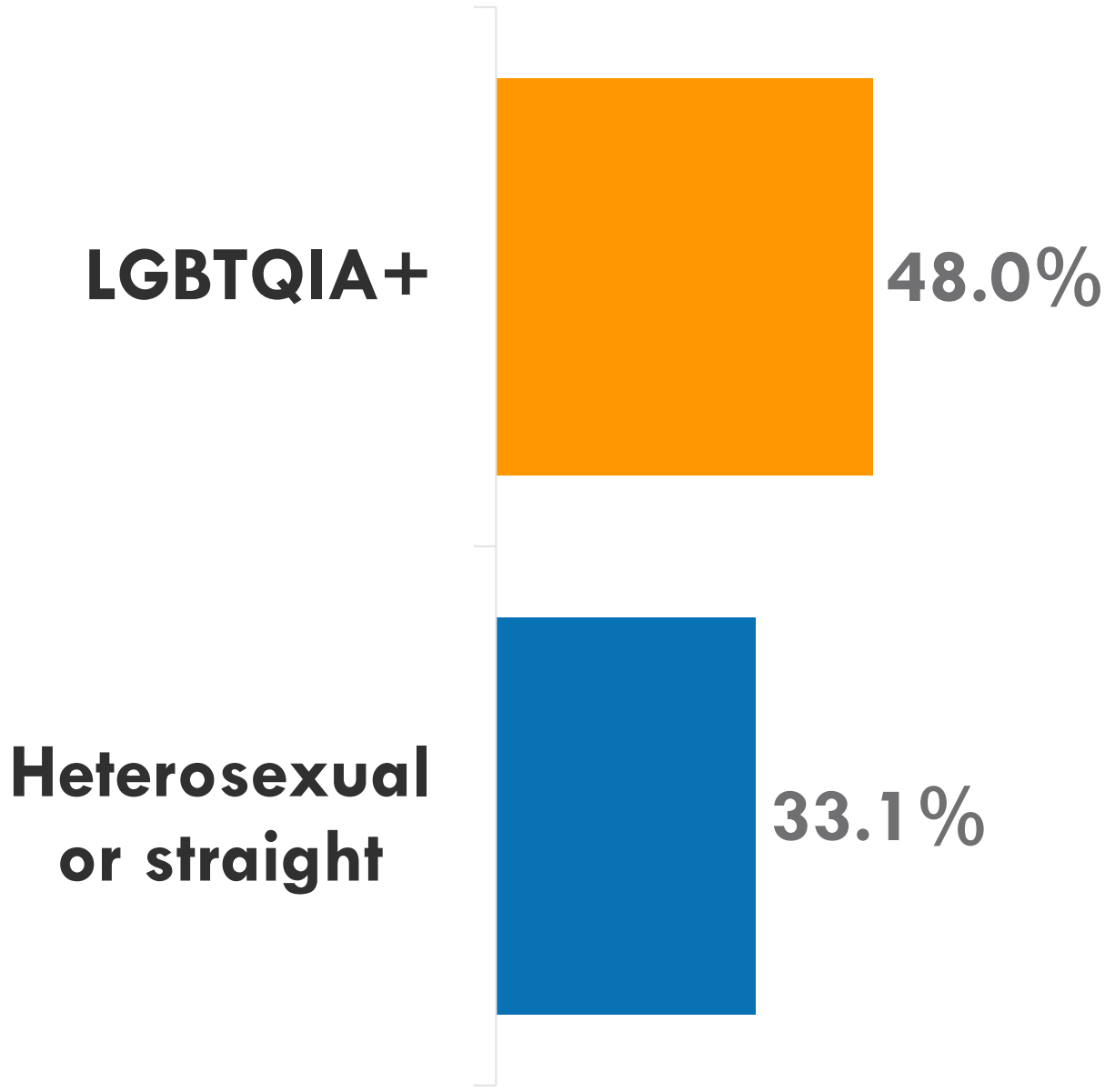


TIKTOK WILL BECOME AMERICA'S MOST POPULAR SOCIAL MEDIA CHANNEL

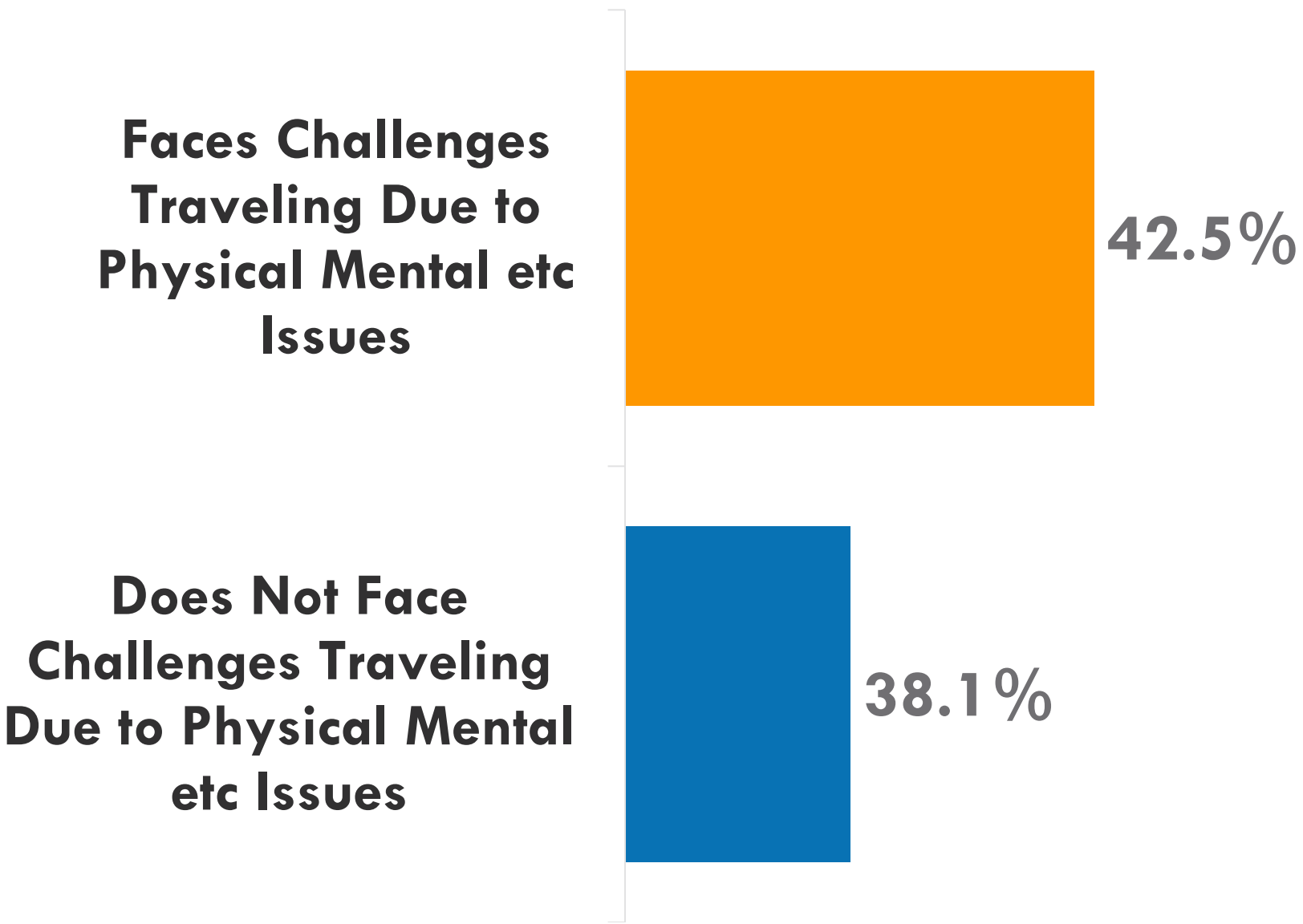
Ethnicity



Orientation

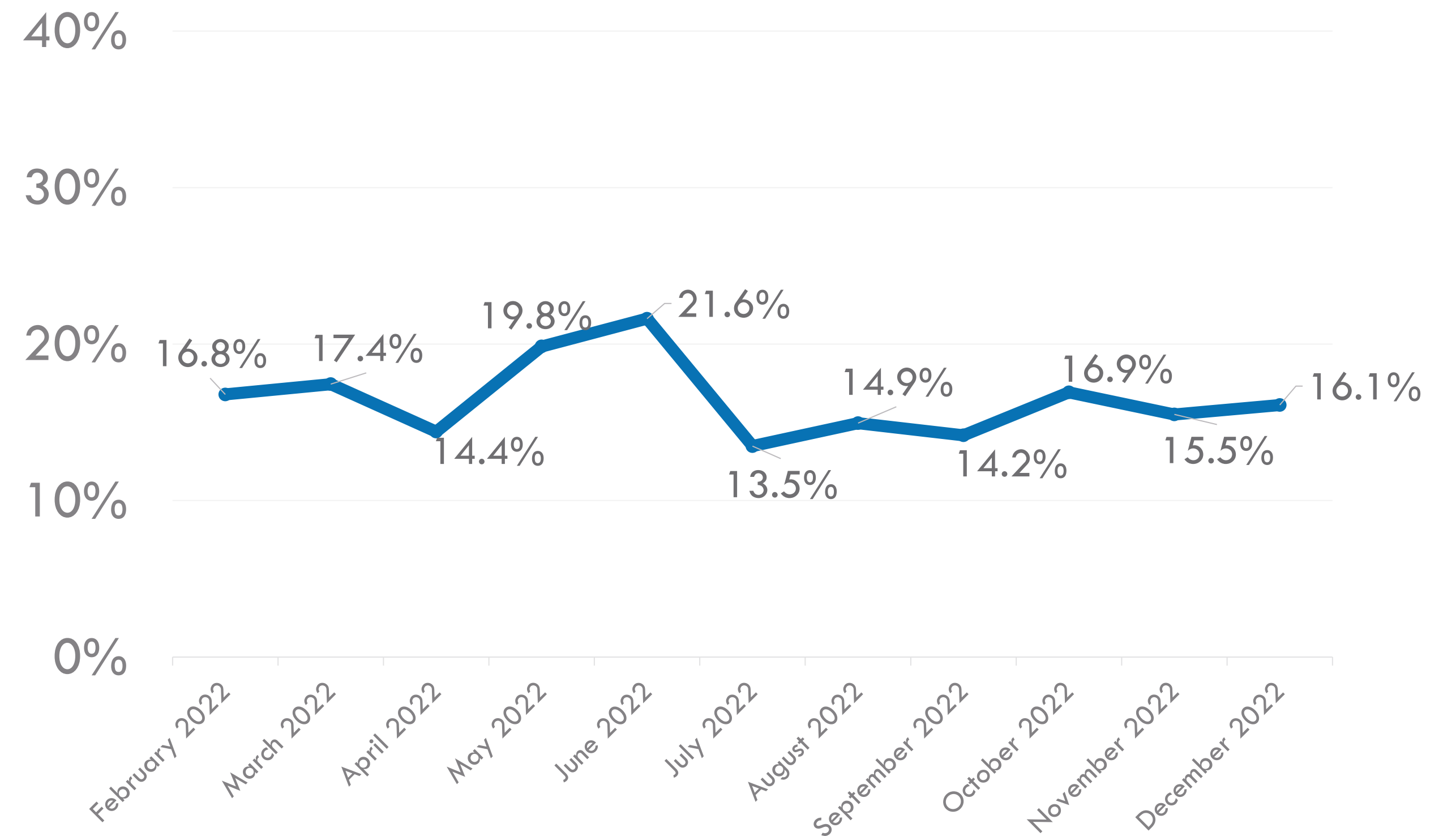
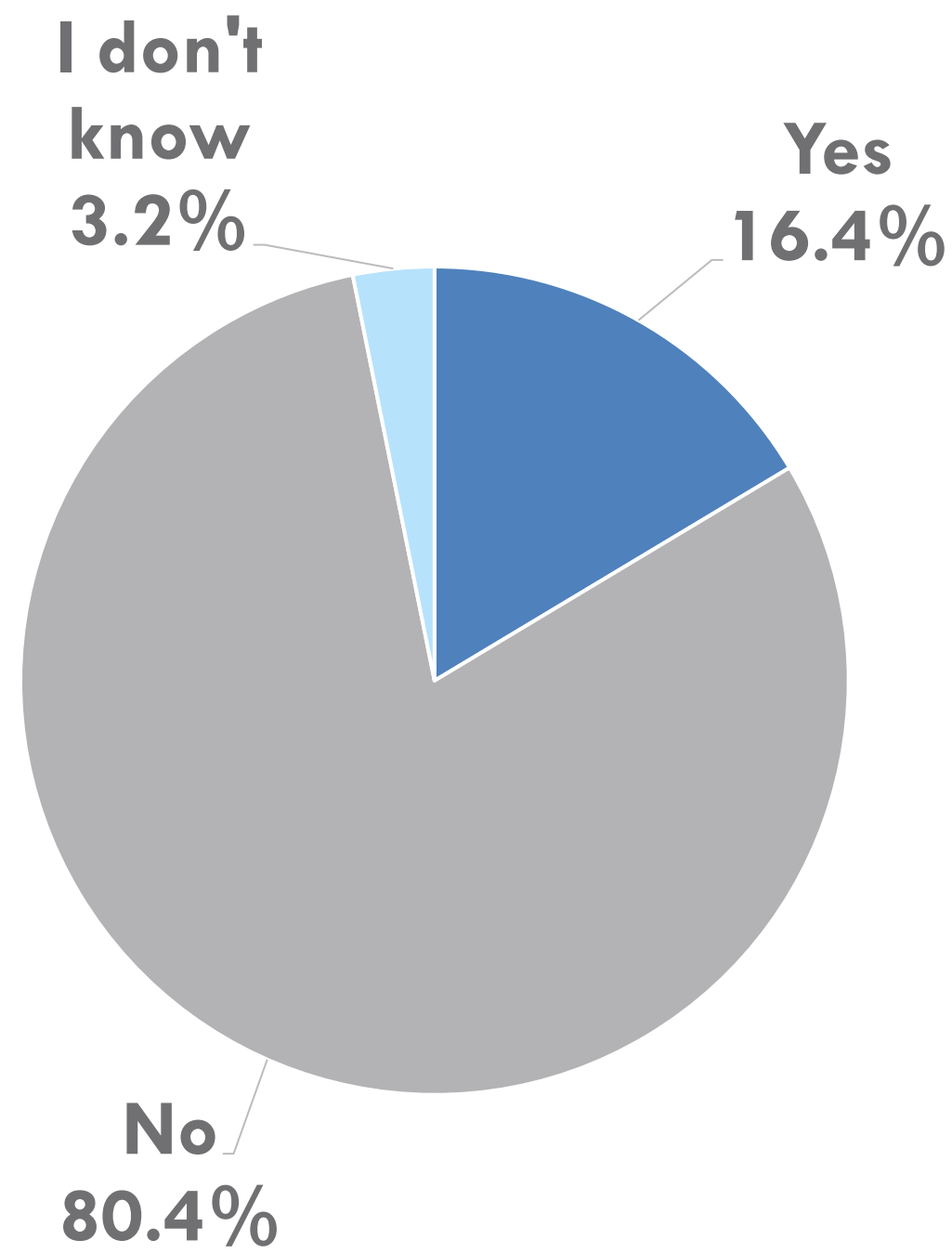


Disability Status



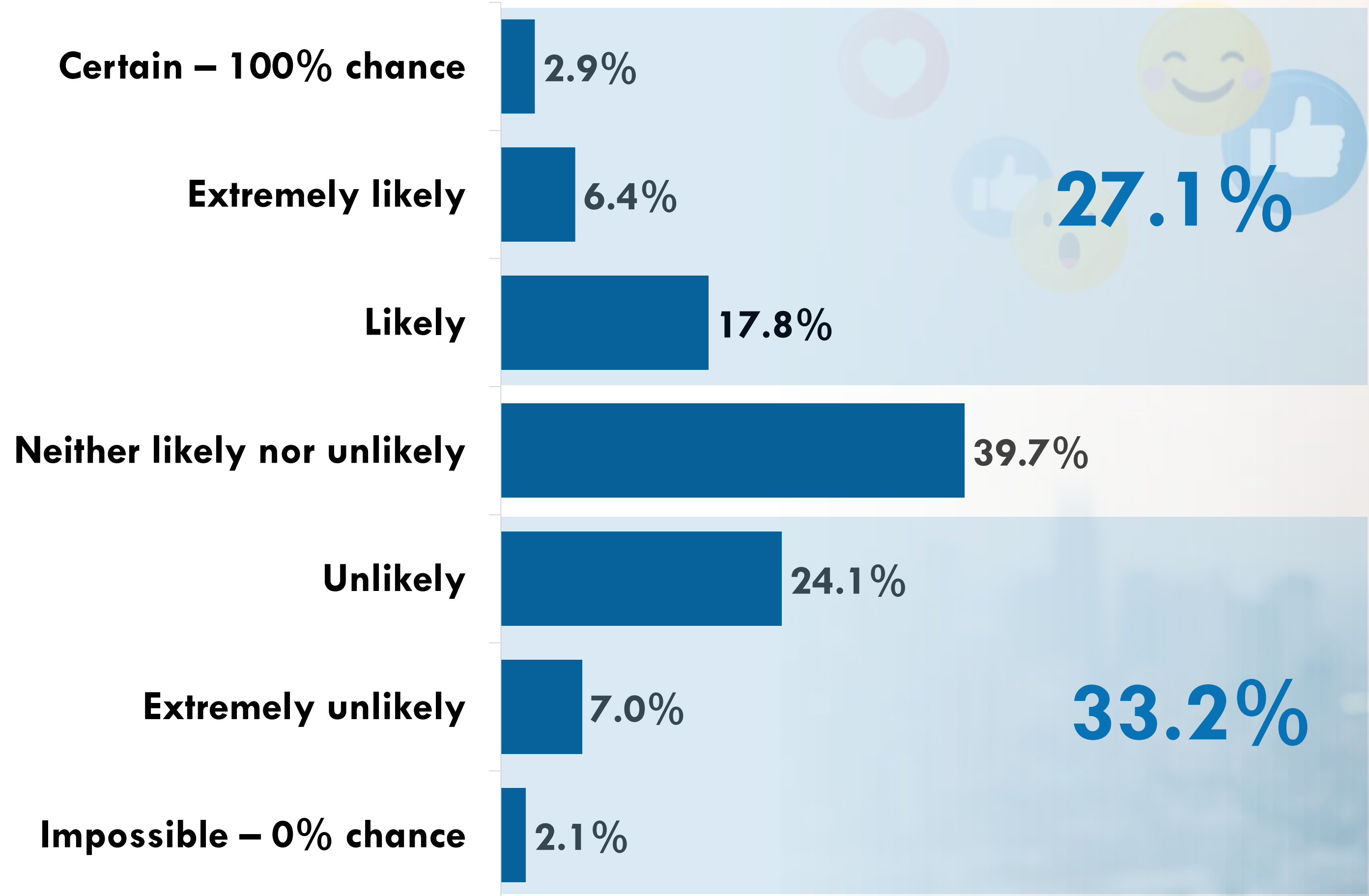
BACKGROUND

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



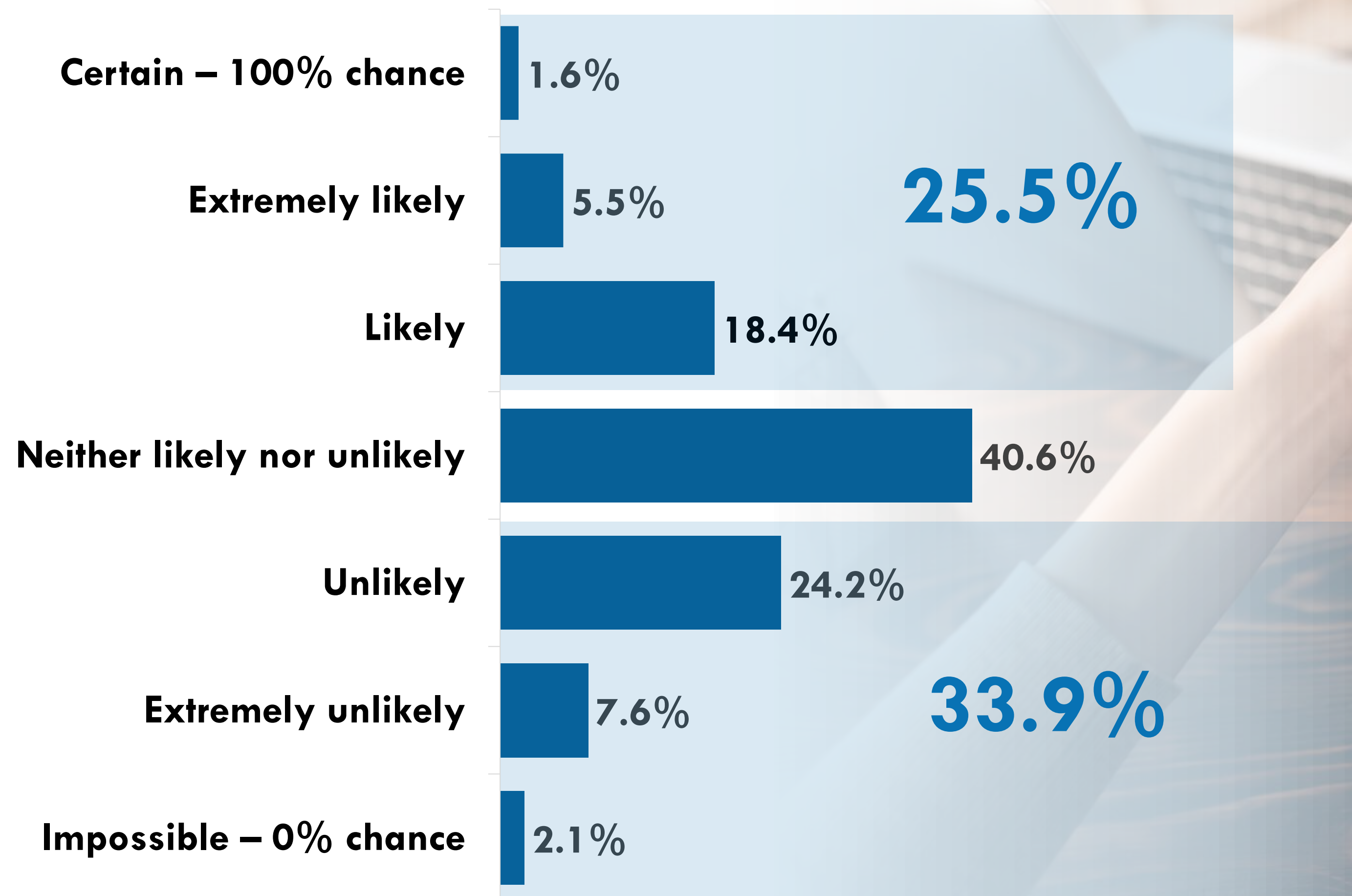
(Base: All respondents (Feb-Dec 2022), 40,710 completed surveys.)

THE APPEAL AND USE OF SOCIAL MEDIA "TRAVEL INFLUENCERS" WILL DECLINE



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

TRAVEL AGENTS/ADVISORS WILL BE USED MORE BY TRAVELERS



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

WHICH GENERATION WAS MOST LIKELY TO SAY TRAVEL ADVISORS WILL BE USED MORE BY TRAVELERS THIS YEAR?



GEN Z



GEN X



MILLENNIALS



BABY BOOMERS

% WHO SAY THIS IS LIKELY

Generation Z



Millennials



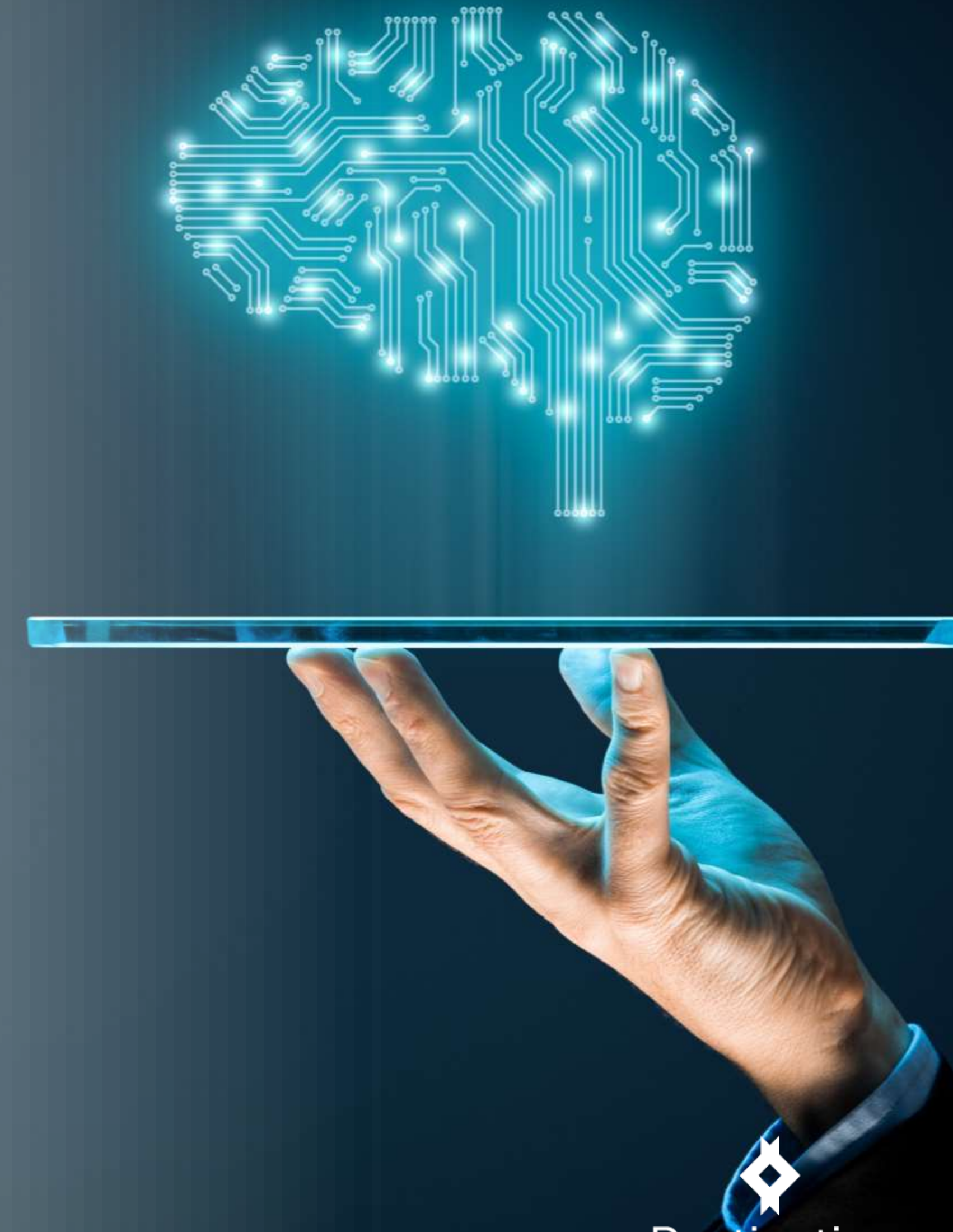
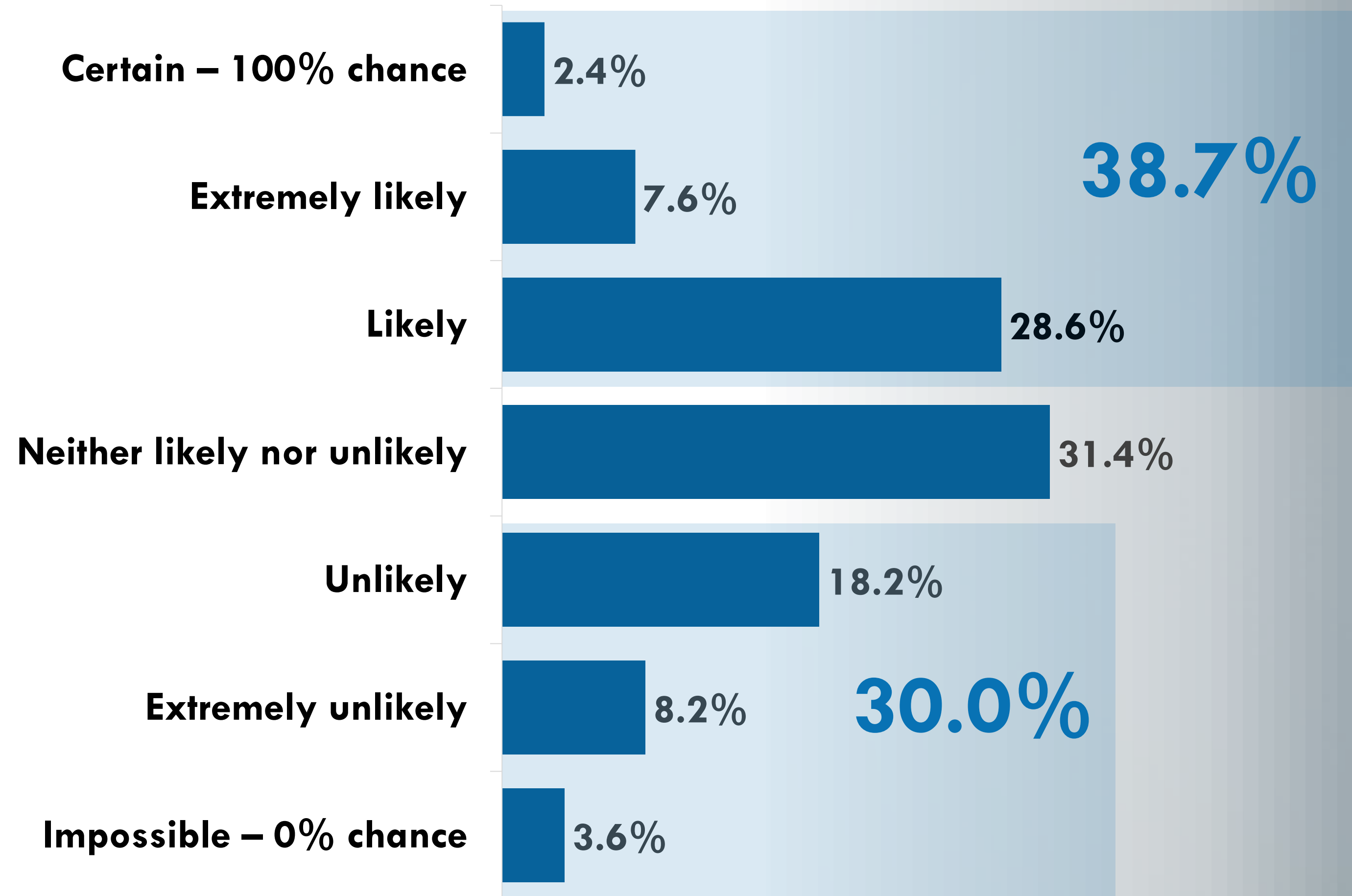
Generation X



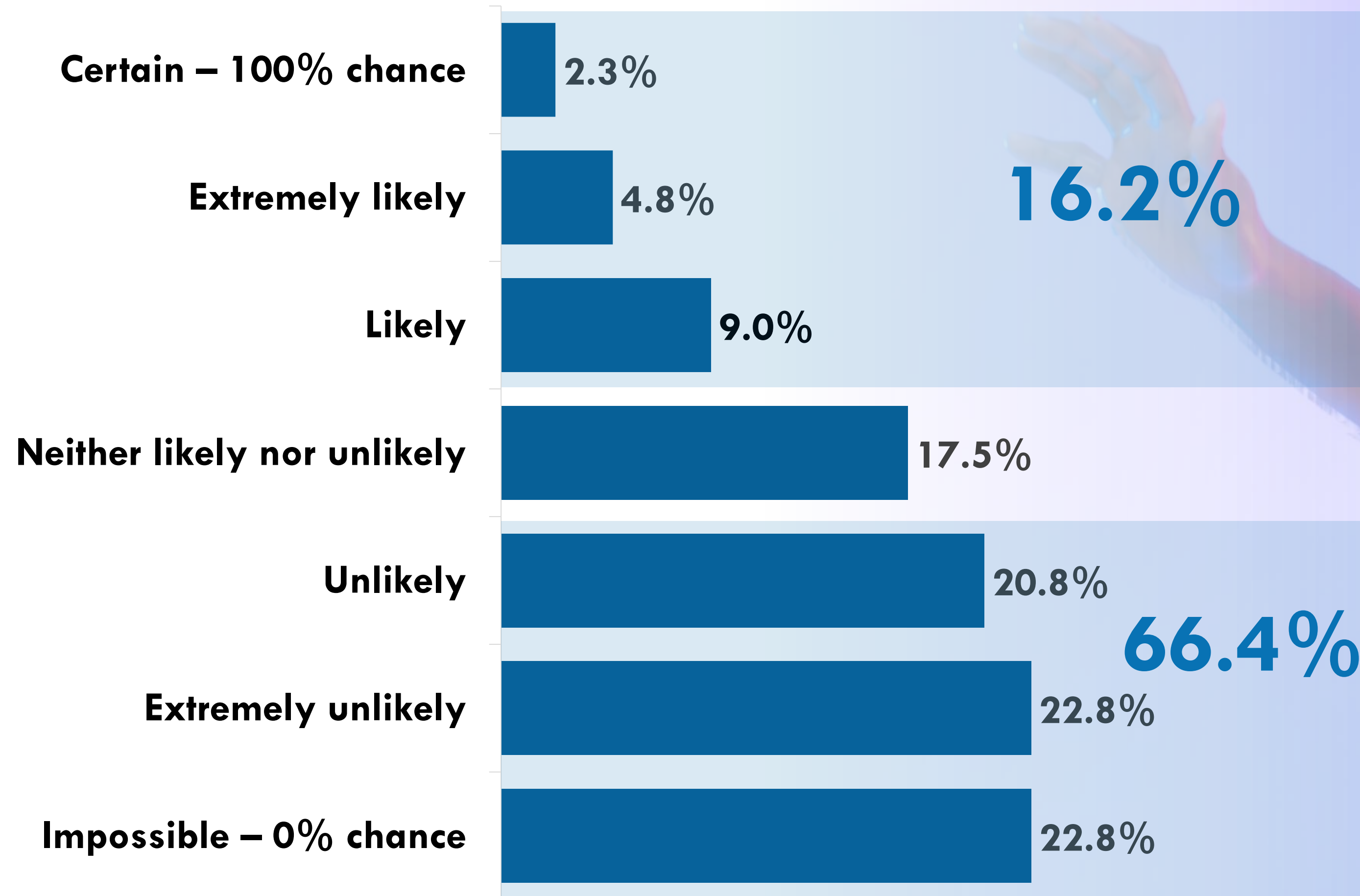
Baby Boomers +



ARTIFICIAL INTELLIGENCE WILL BEGIN TO REPLACE TRAVEL AGENTS/ADVISORS



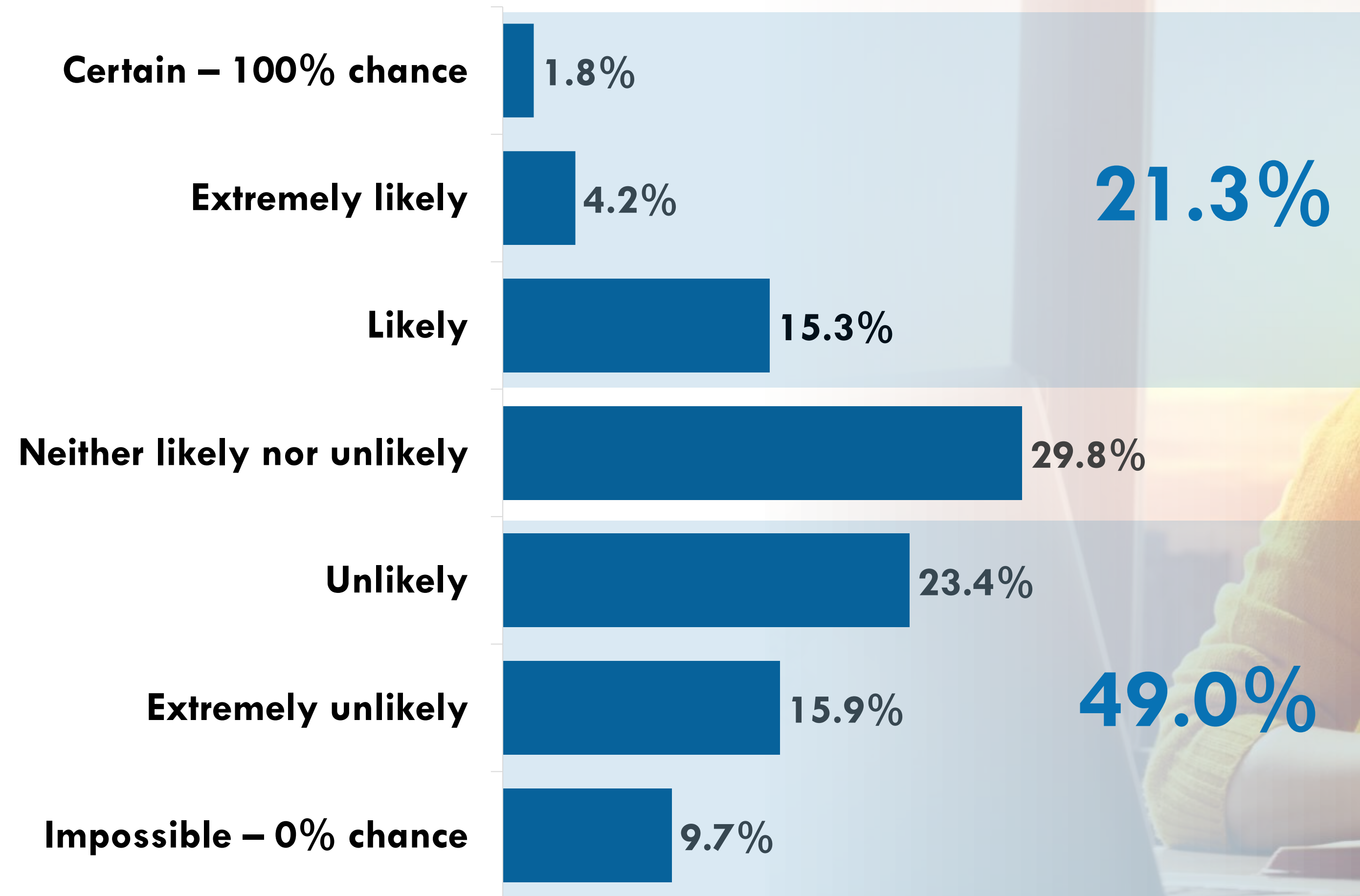
I WILL PURCHASE MY FIRST VIRTUAL REALITY HEADSET



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

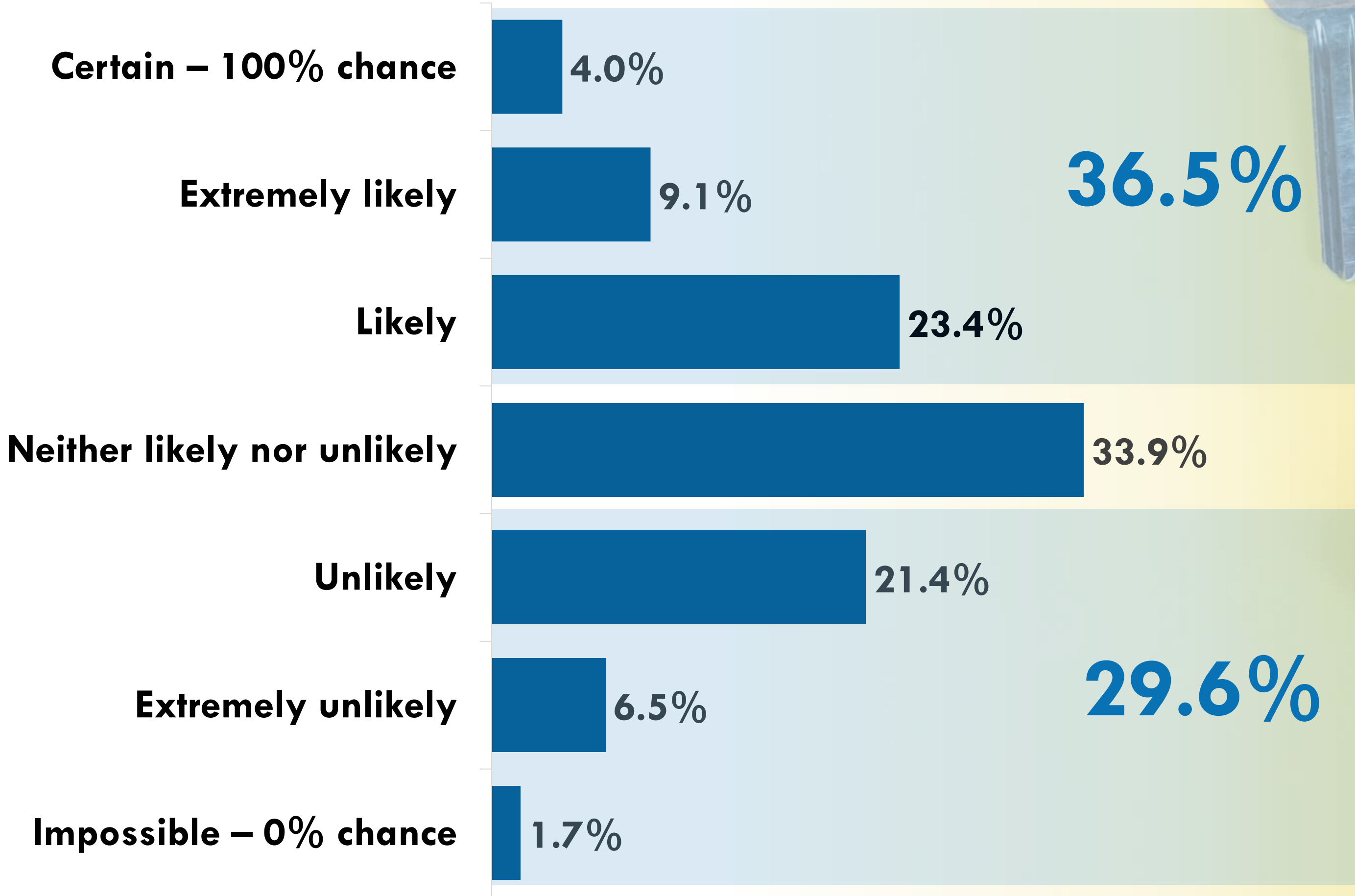


THE METAVERSE WILL START REPLACING SOME REAL-WORLD TRAVEL



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

TRAVELERS WILL SOUR ON THE USE OF HOME RENTAL SERVICES LIKE AIRBNB, VRBO, ETC.



(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

Higher Likelihood

(50%+ Say it's at least likely)



Wildfire Problems in the West



Travel Becomes More Frustrating



Labor Shortages in the Travel Industry



Demand for Authenticity Rises



Travel Industry Price Gouging More Common



Decline in Interest in Cryptocurrency Investment

Lower Likelihood

(49-30%+ Say it's at least likely)



Urban Areas Become Unmanageable/Dangerous



TikTok Becomes #1 Social Platform



War Expands Beyond Ukraine



Travel Advisors Replaced by AI



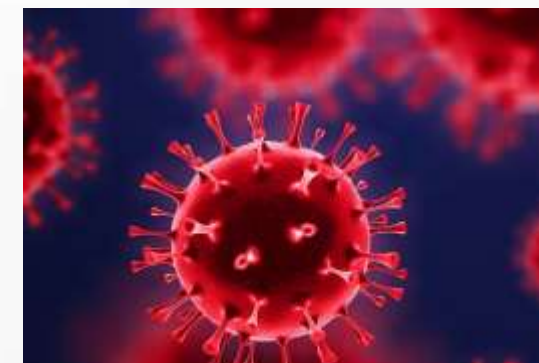
National Parks Overrun by Visitors



Travelers Sour on Home Rental Services



More Proactivity in Green Travel



COVID Becomes a Thing of the Past



Bull Market in 2023



Gas Prices Drop Sharply

Lowest Likelihood

(29-0% Say it's at least likely)



Influencers Decline in Popularity



US in War in Asia



Travel Advisors Become More Popular

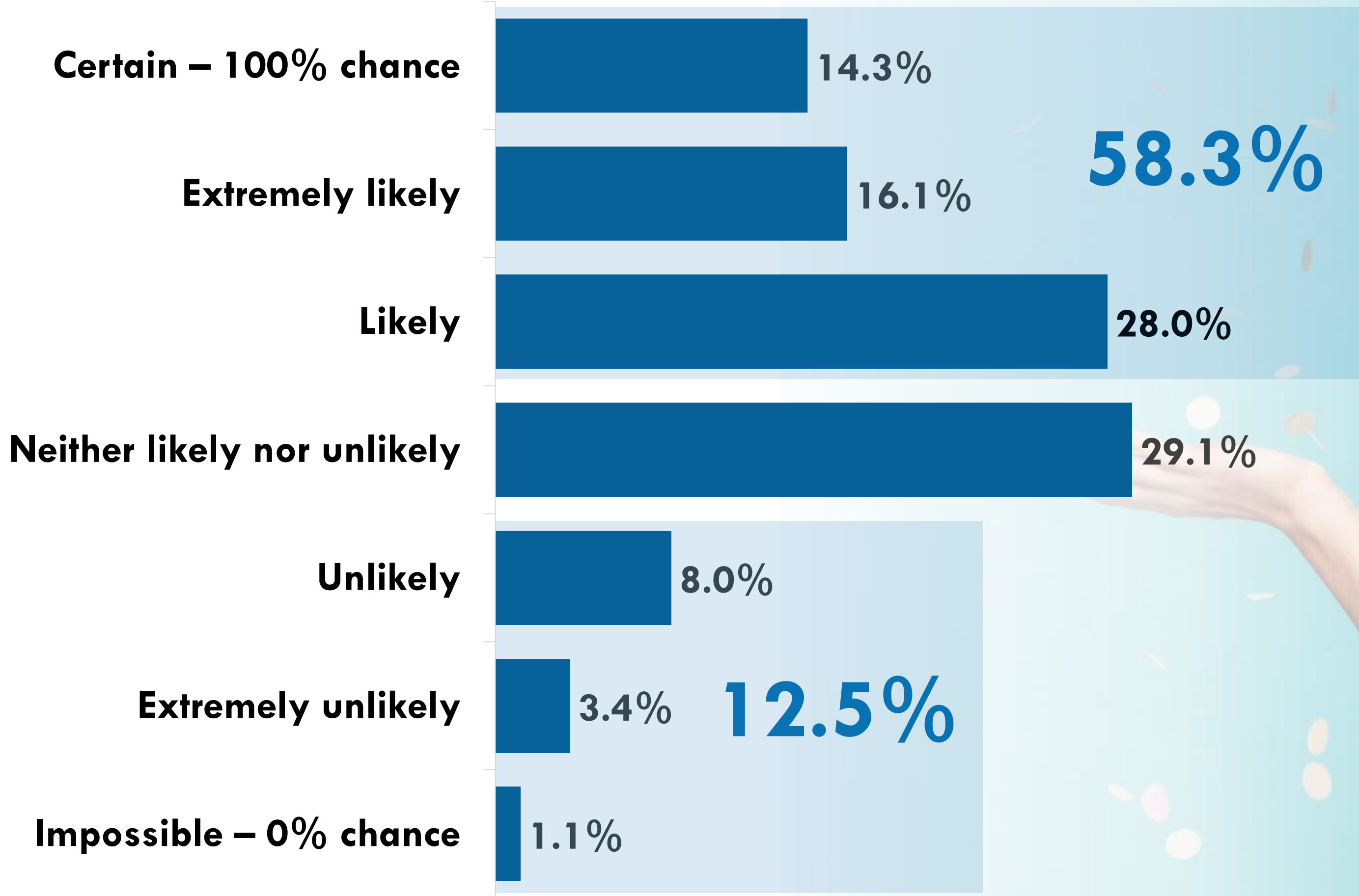


First-time VR Headset Buyers



Metaverse Starts Replacing Travel

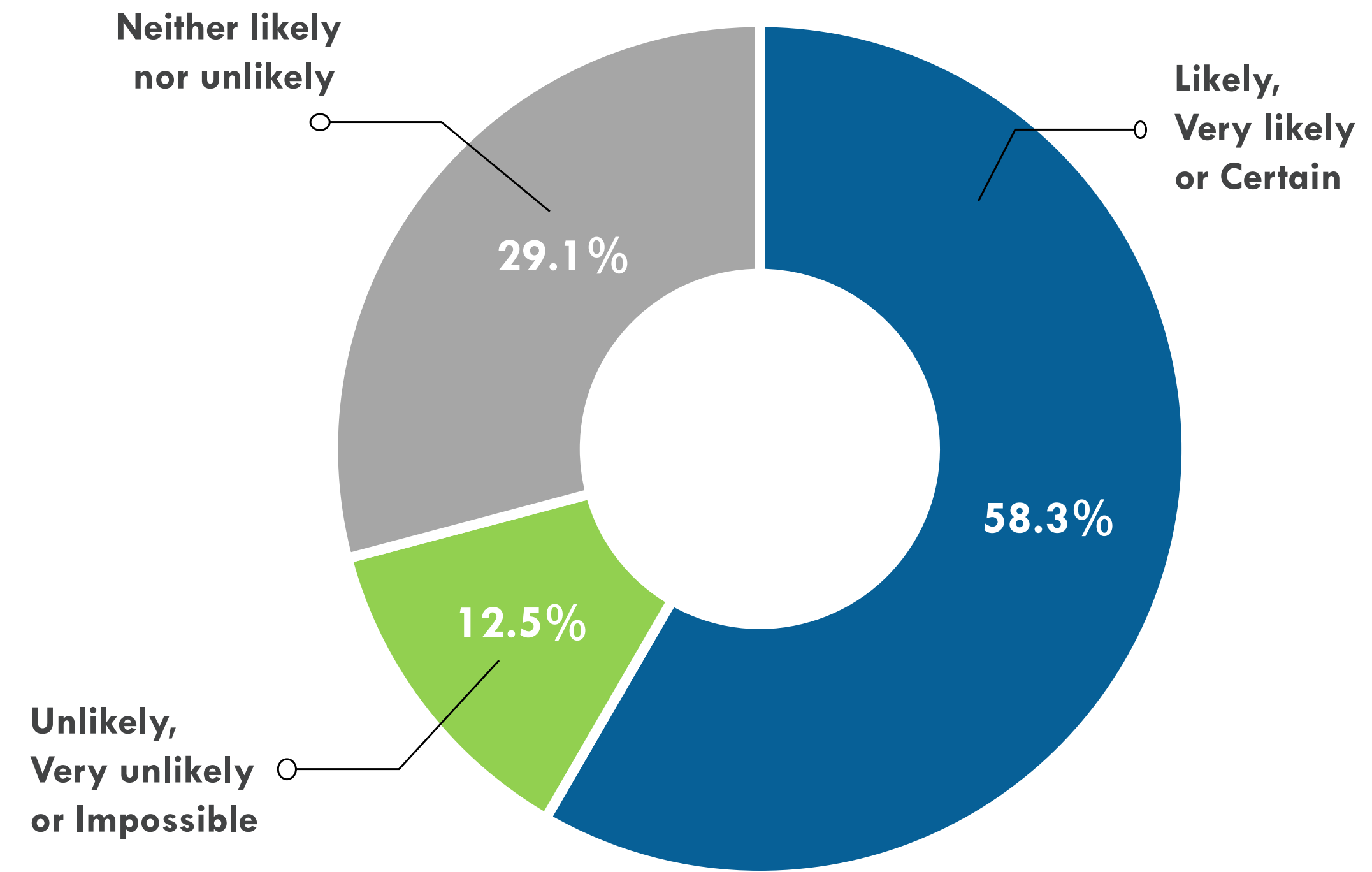
2023 WILL BE A GREAT YEAR FOR ME PERSONALLY



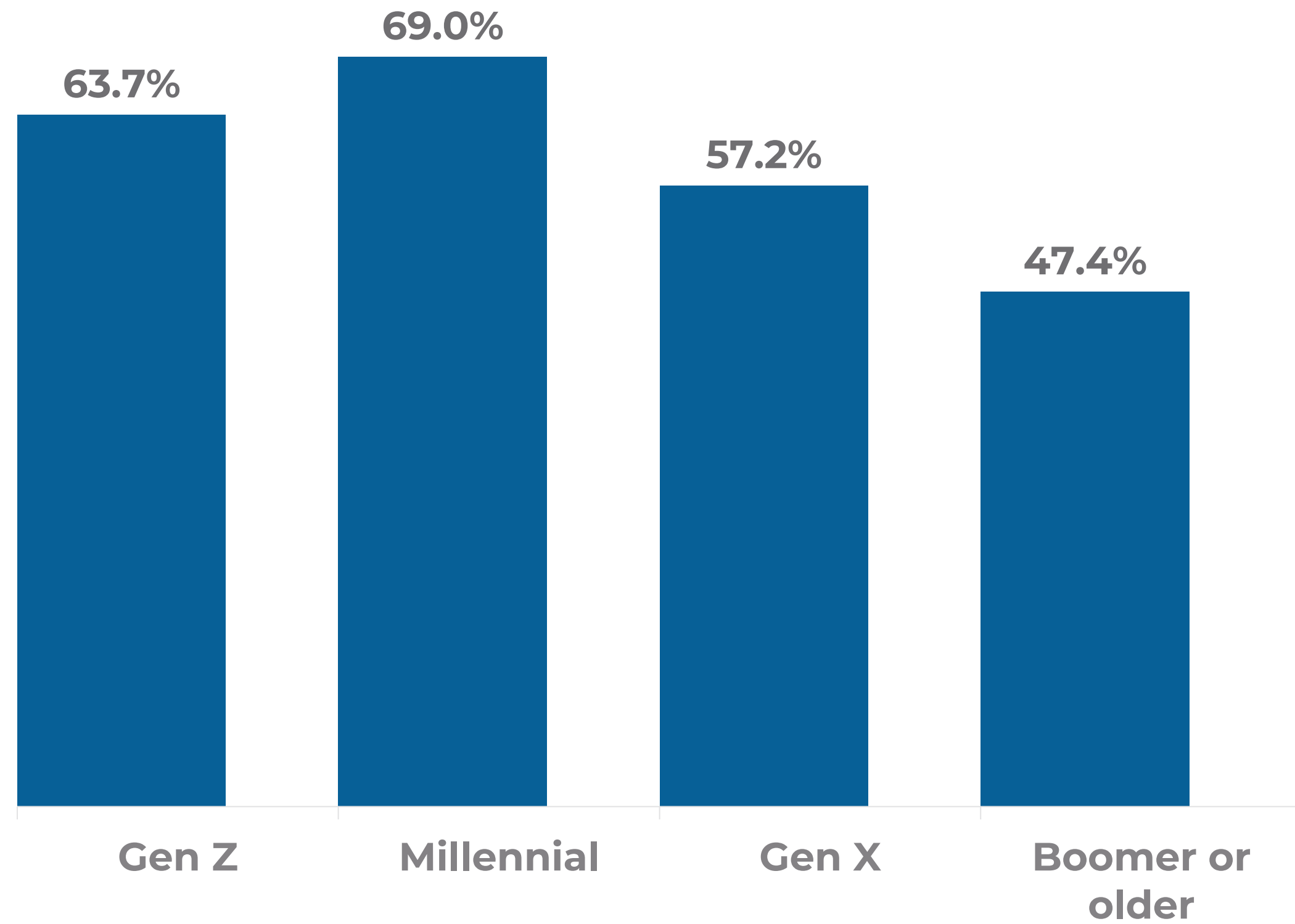
(Base: All respondents, 4,017 completed surveys. Data collected December 15-25, 2022.)

2023 WILL BE A GREAT YEAR FOR ME PERSONALLY

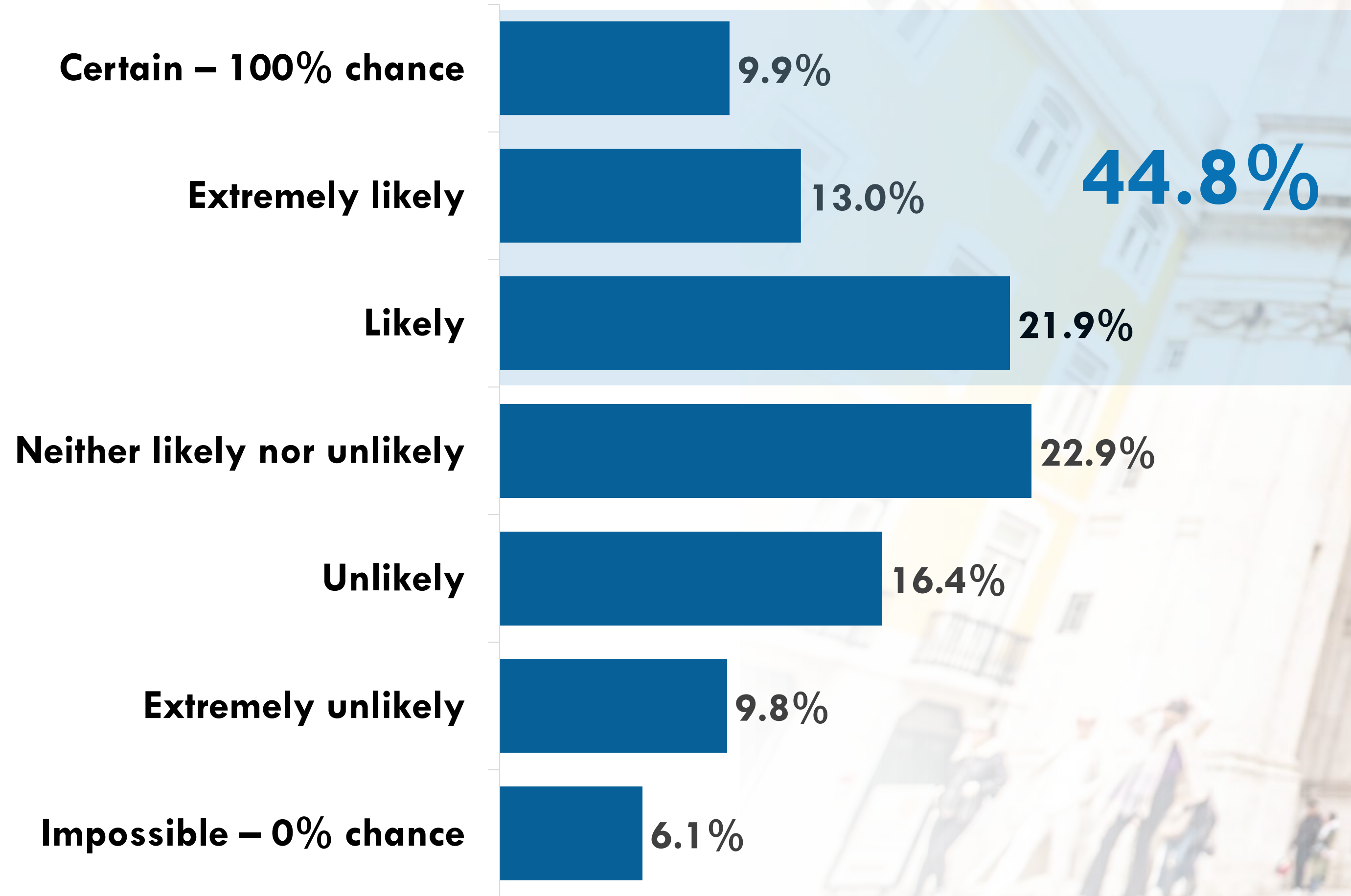
% of US Travelers



Generation



I'LL TAKE A DREAM-TRIP TO SOMEWHERE EXCITING IN 2023



KEY TAKEAWAYS

01

High Travel Prices are Costly to Travel Morale.

02

Further price gouging, labor shortages and increasingly frustrating domestic travel experiences are among the top scenarios Americans feel are likeliest to occur in 2023.

03

Major U.S. Cities are still having to overcome negative perceptions exacerbated by the pandemic & negative media coverage.

MORE RESEARCH WE CAN PROVIDE

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

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