

The State of the American Traveler

Future Partners

March 2024

We're a creative insights firm shaping strategies that
capture hearts, minds, and *market share*.

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**Opportunity
powered by insight.**

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Bringing the future of travel
within reach

Presentation deck and
recording will be available on
our website:

FuturePartners.com

*April Livestream
Registration*



Today's Agenda

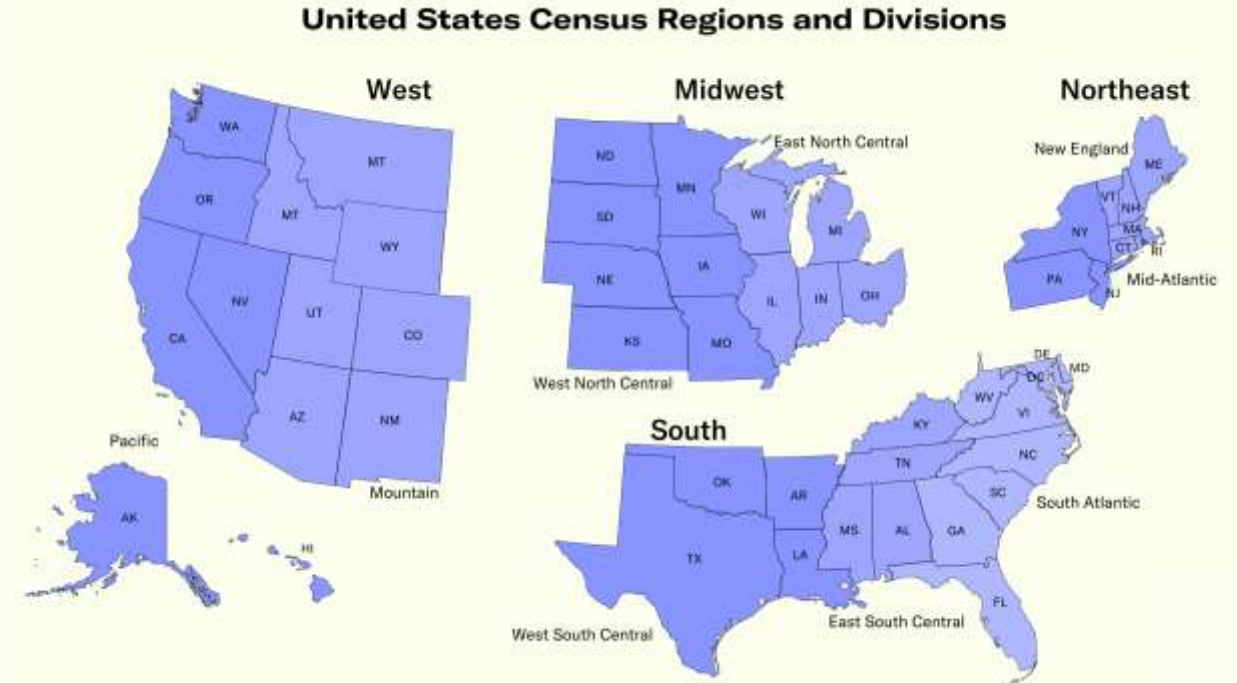
April Livestream
Registration



- **What's** Up With the Eclipse?
- Travel Sentiment Overview
- Newer Marketing Platforms
- Business and Group Meetings Travel
- Meeting Planner Panel

Methodology

- *Monthly tracking survey*
- *Representative sample of adult American travelers in each of four U.S. regions*
- *Tracks traveler sentiment to generate insights into domestic travel trends*
- *Survey collected: [February 19-23](#)*
- *4,000+ fully completed surveys collected each wave*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



Questions? Our Team is Online To Answer



What's Up With the Solar Eclipse?



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Gas Stations in Austin

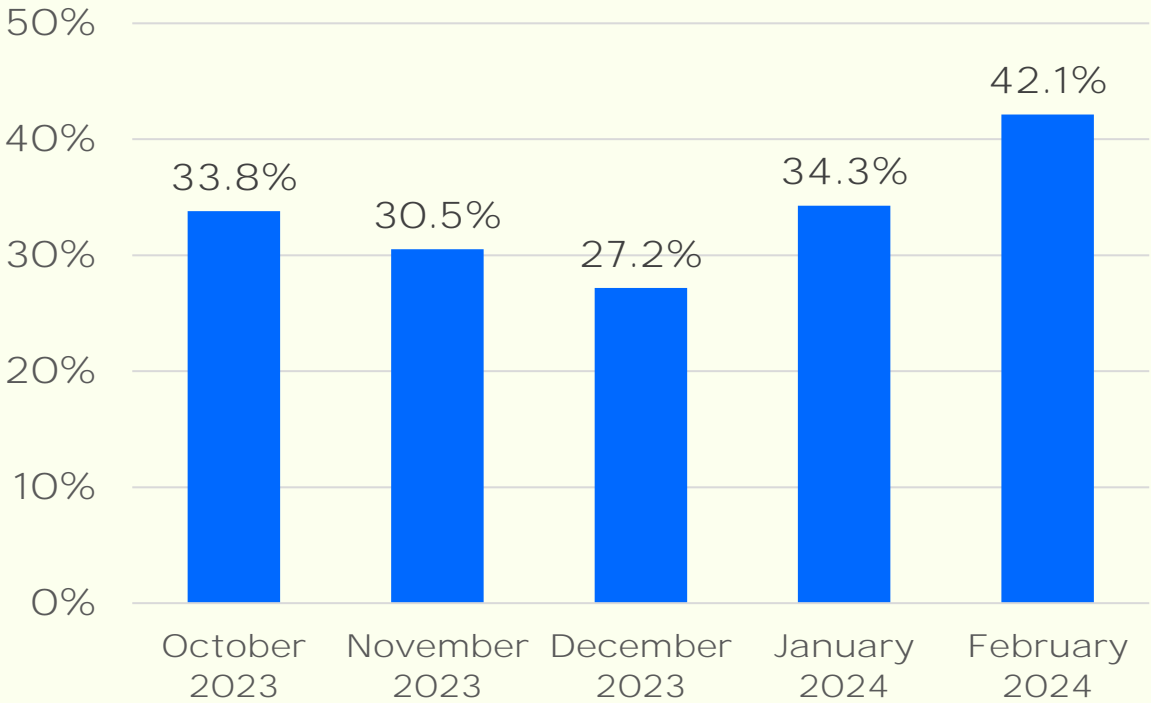
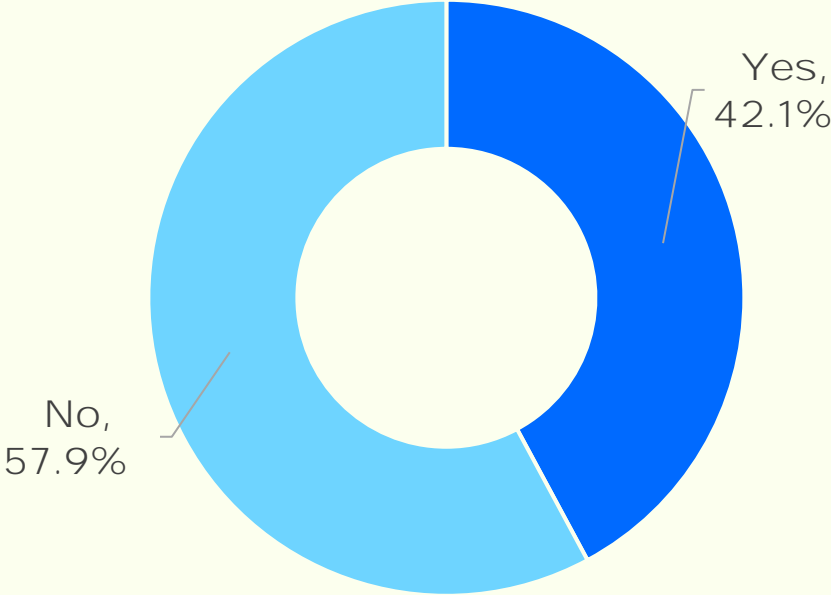


Eclipse Stories



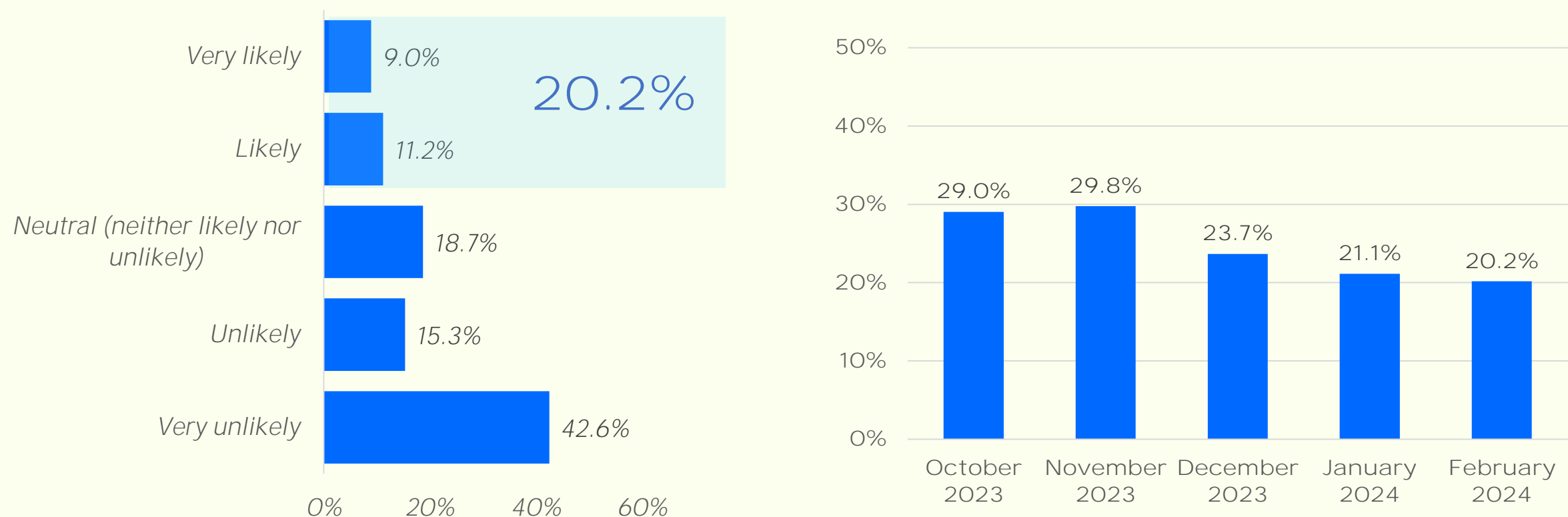
Awareness of the upcoming Eclipse grew sharply this month

Aware of the Eclipse



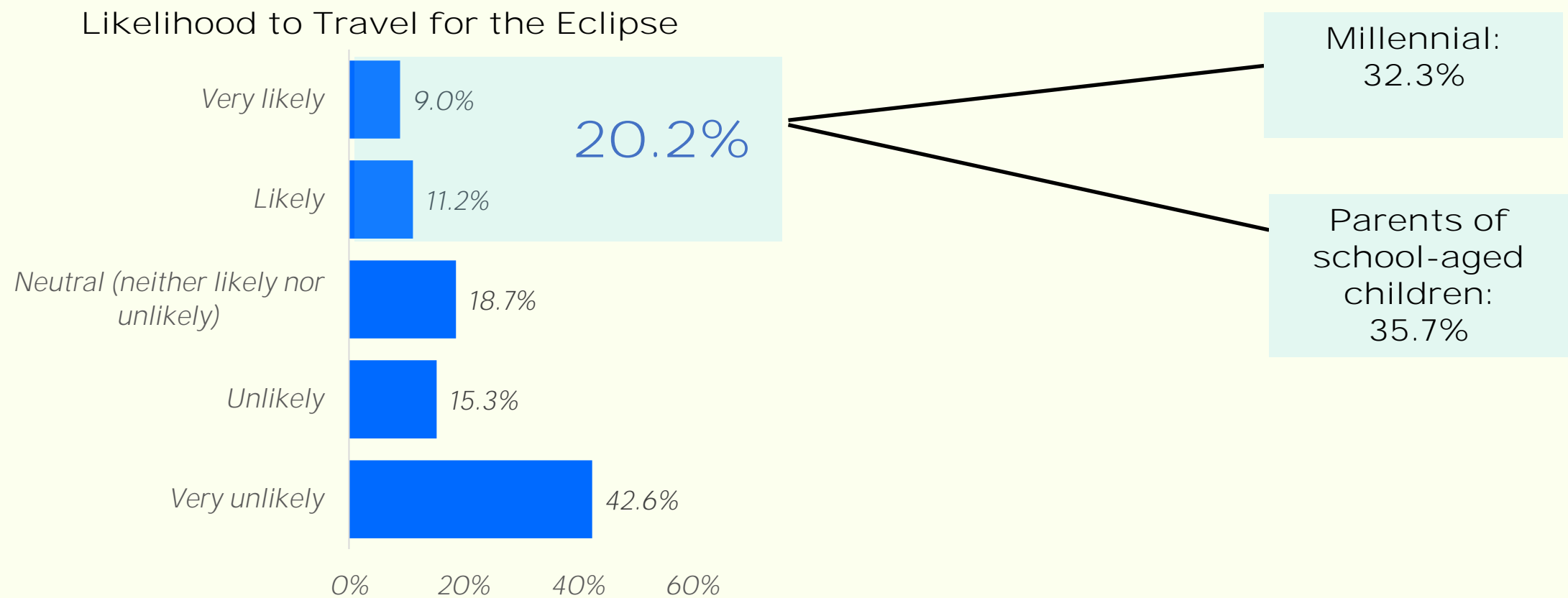
Question: *Before taking this survey, were you aware that this total eclipse was happening in April?*

One-in-five American travelers are likely to take a trip to witness the Eclipse, however expectations to travel for the Eclipse have declined over time



Question: *How likely is it that you will travel (50 miles or more from your home) to experience the April 8, 2024 eclipse?*

Likely Eclipse trip takers skew Millennial and parents with school-age children



Question: *Before taking this survey, were you aware that this total eclipse was happening in April?*

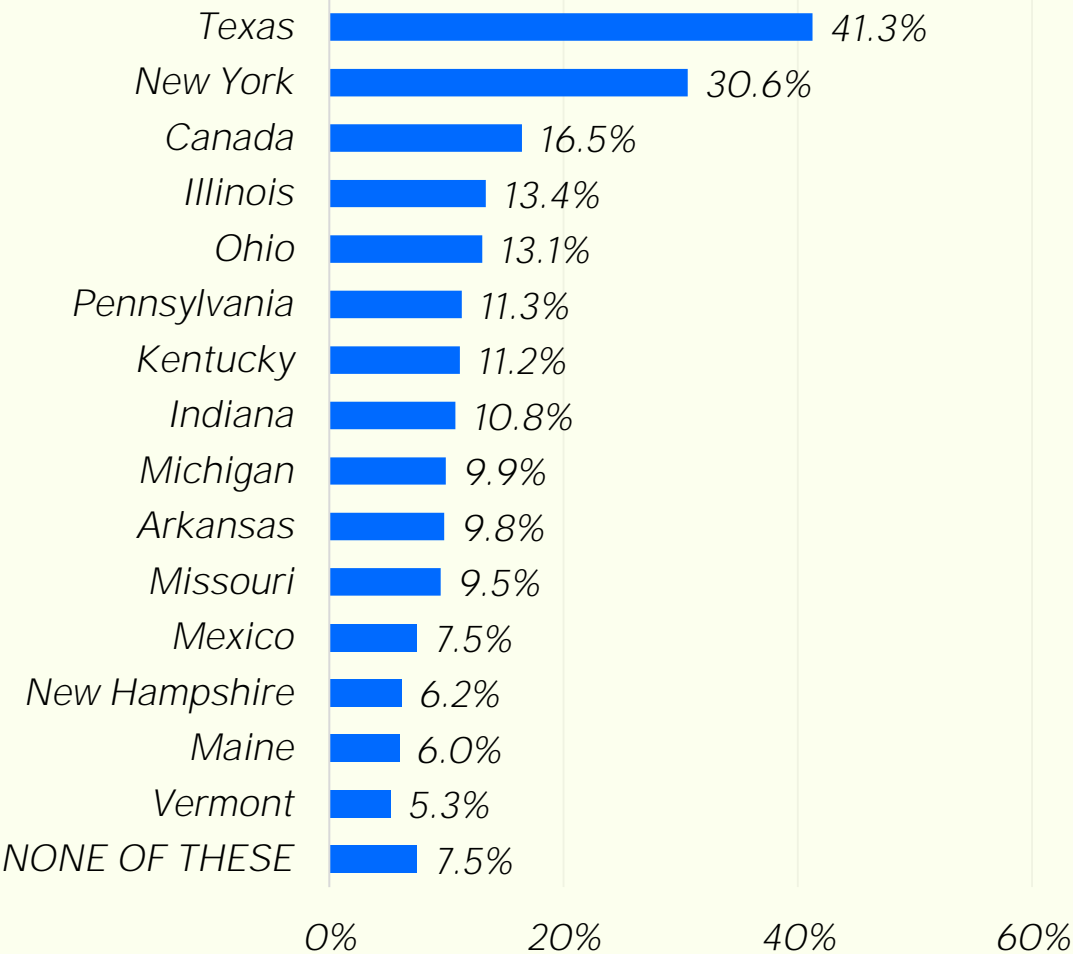
Texas and New York are the states Americans say they are most likely to travel to (or within) to experience the Eclipse

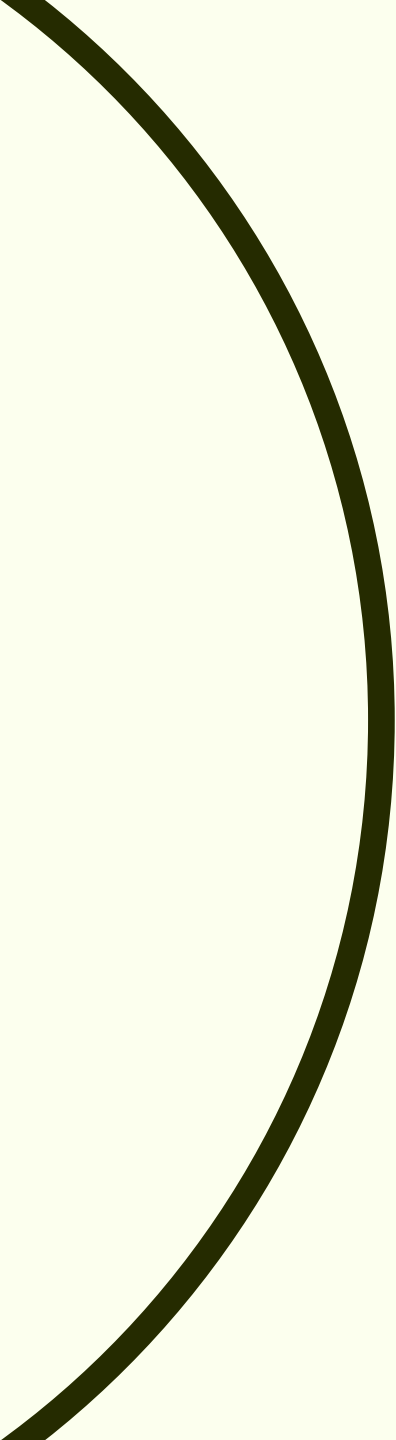
Question:

Which states or countries would you most likely travel to (or within) to experience the April 8, 2024 eclipse?

Question asked of respondents “likely” of “Very likely” to travel for the event.

Base = 5,045 travelers.





Current Sentiment

*April Livestream
Registration*



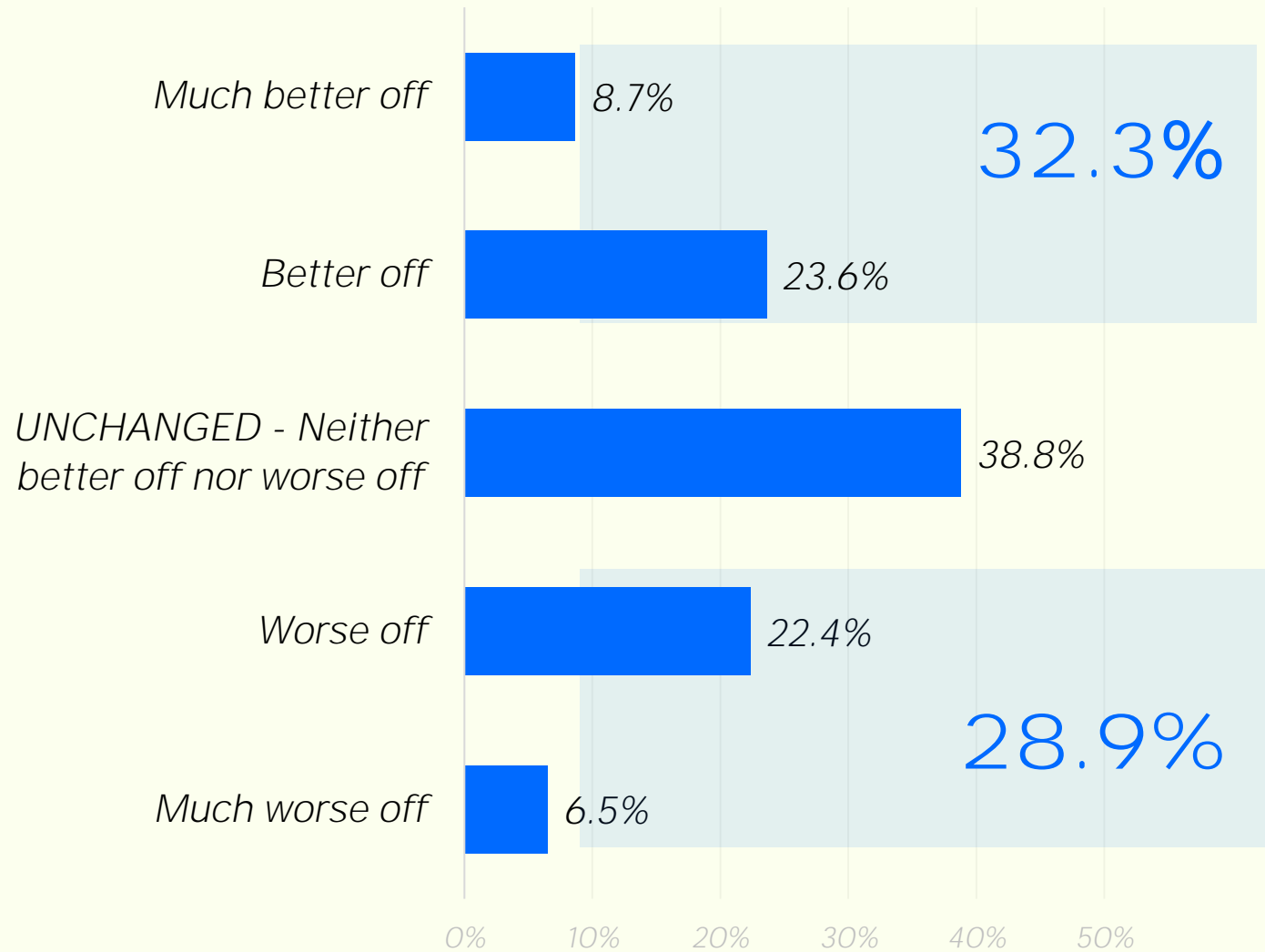
Travelers' sense of personal financial well-being moved forward this month



American travelers remain fairly split on their current financial situation

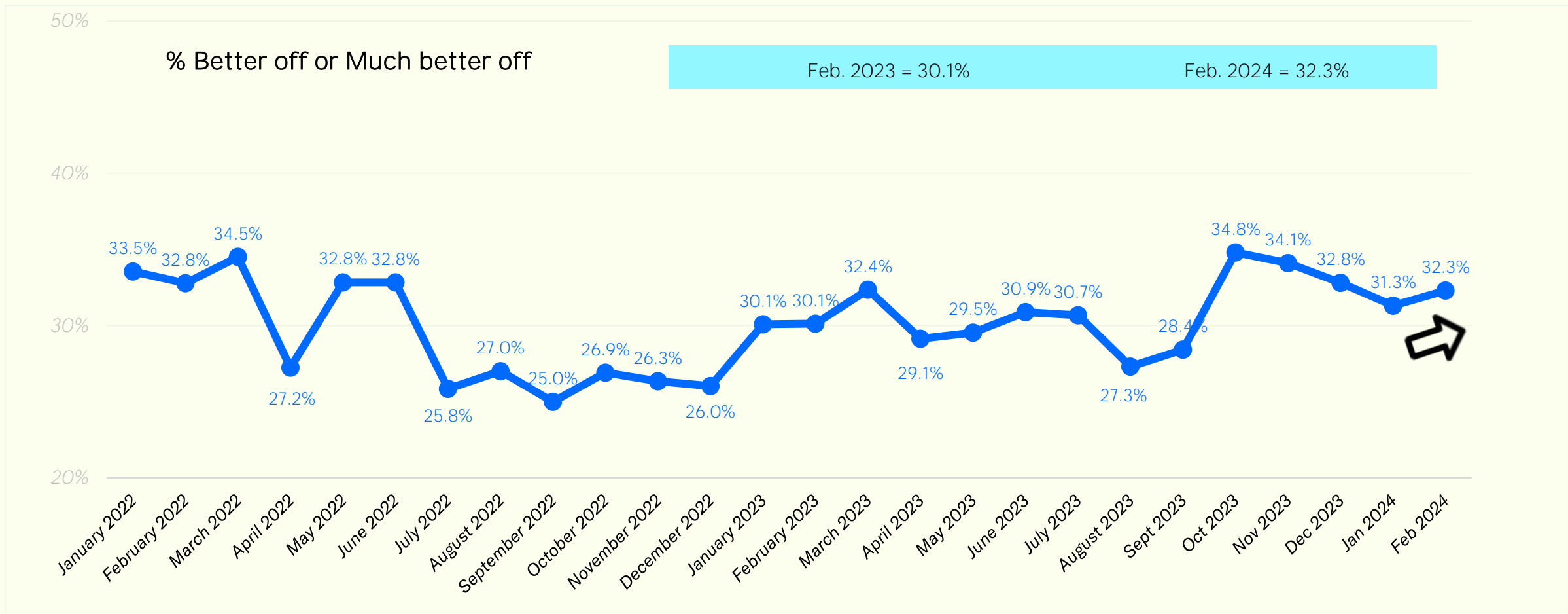
Question:

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



The proportion of travelers feeling better off this year rebounded slightly this month.

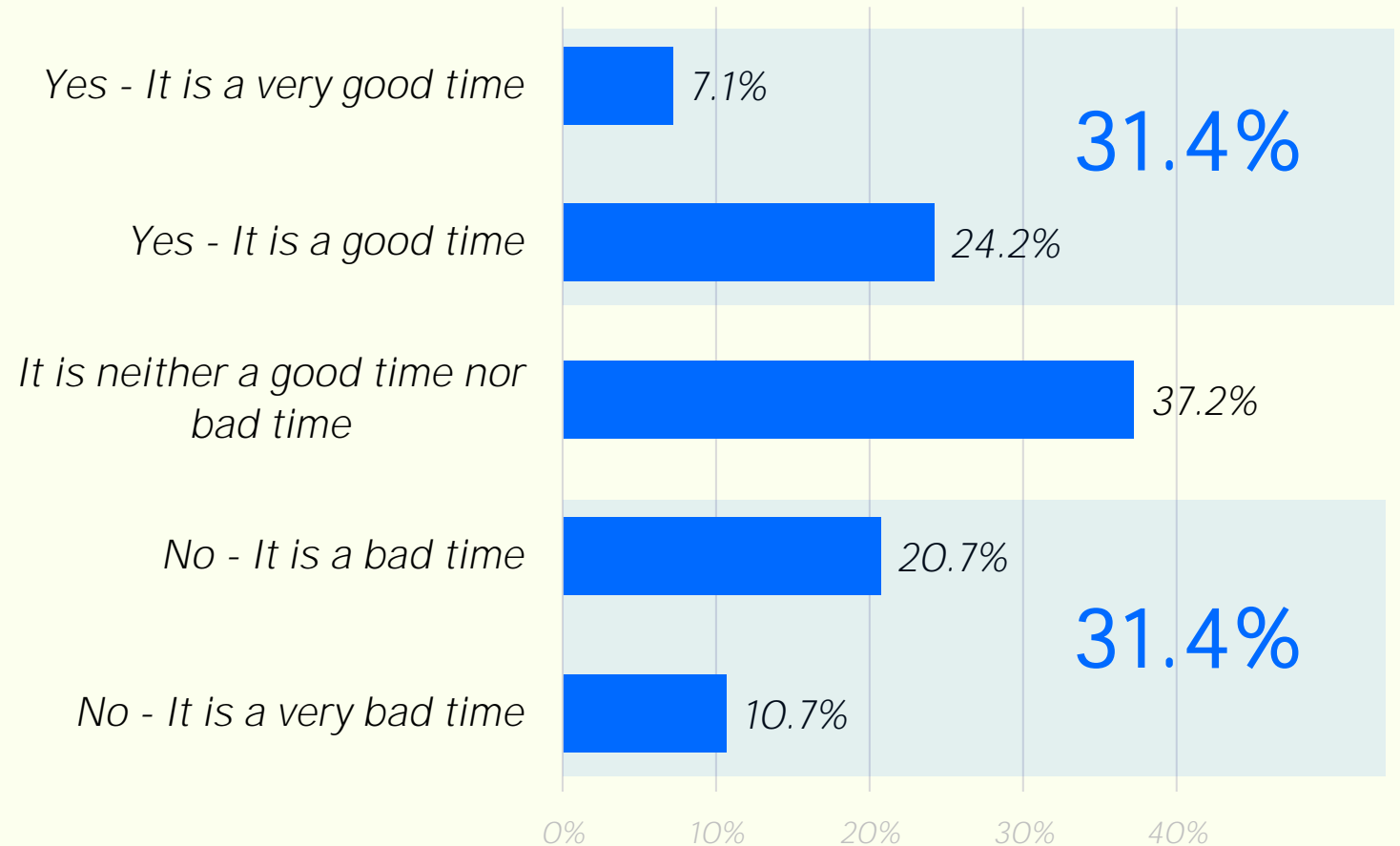
Question:
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



American travelers are split in their belief that the present is a good time to spend on leisure travel

Question:

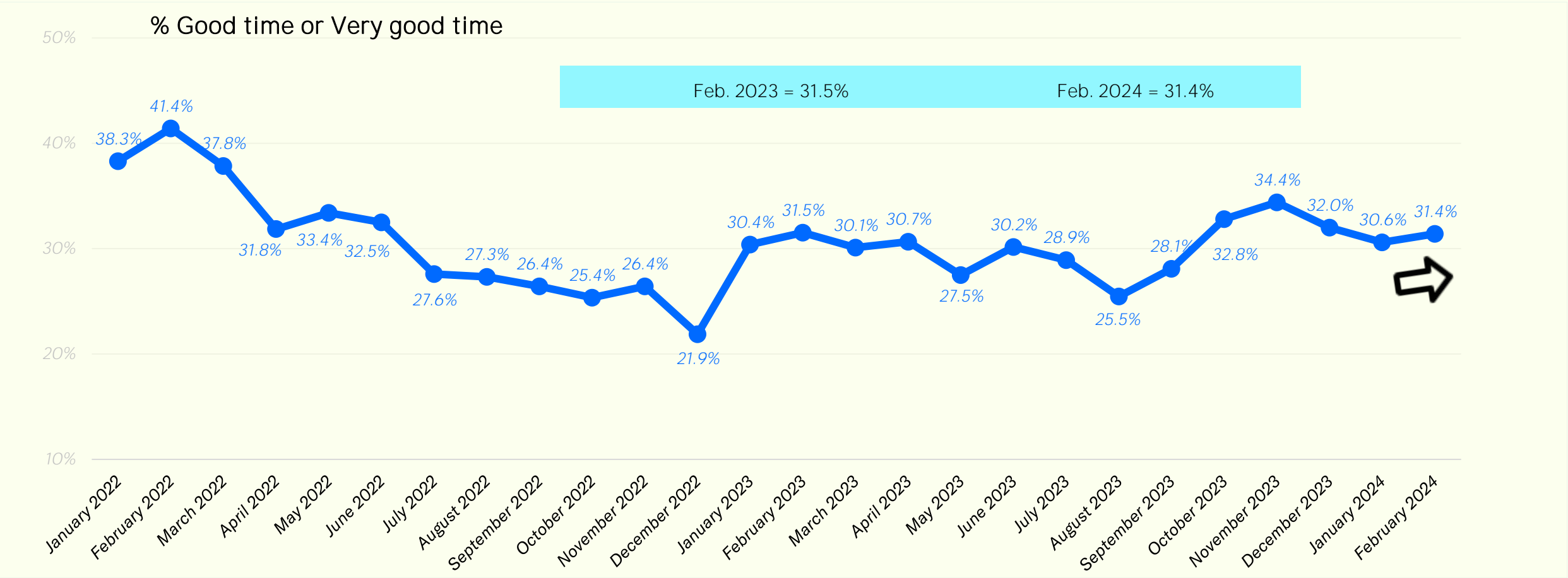
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



The belief that the present is a good time to spend on leisure travel held steady this month

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?



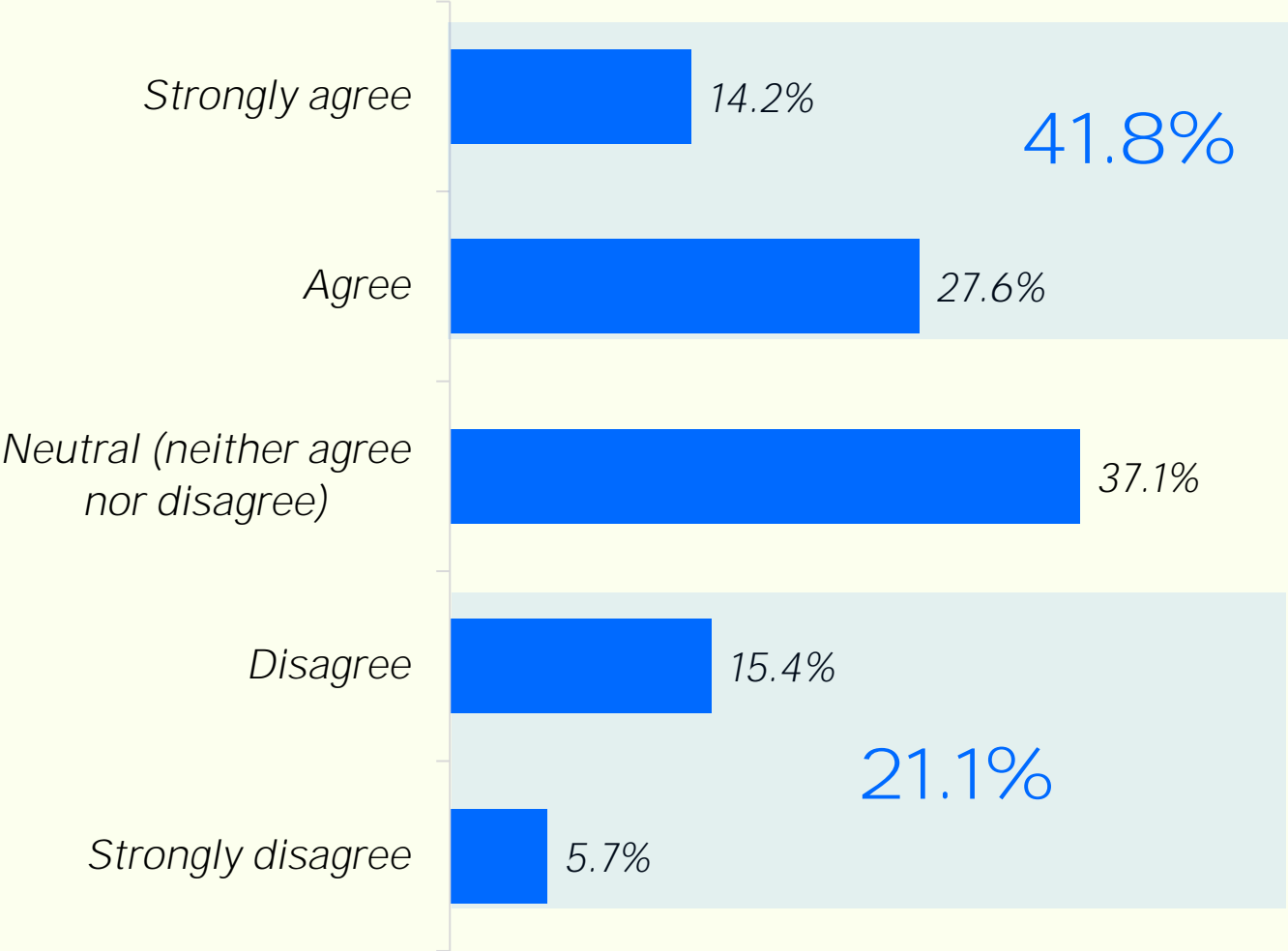
Concerns about a coming recession are in steady decline



Americans by a two to one margin still expect a coming recessionary period.

Question:

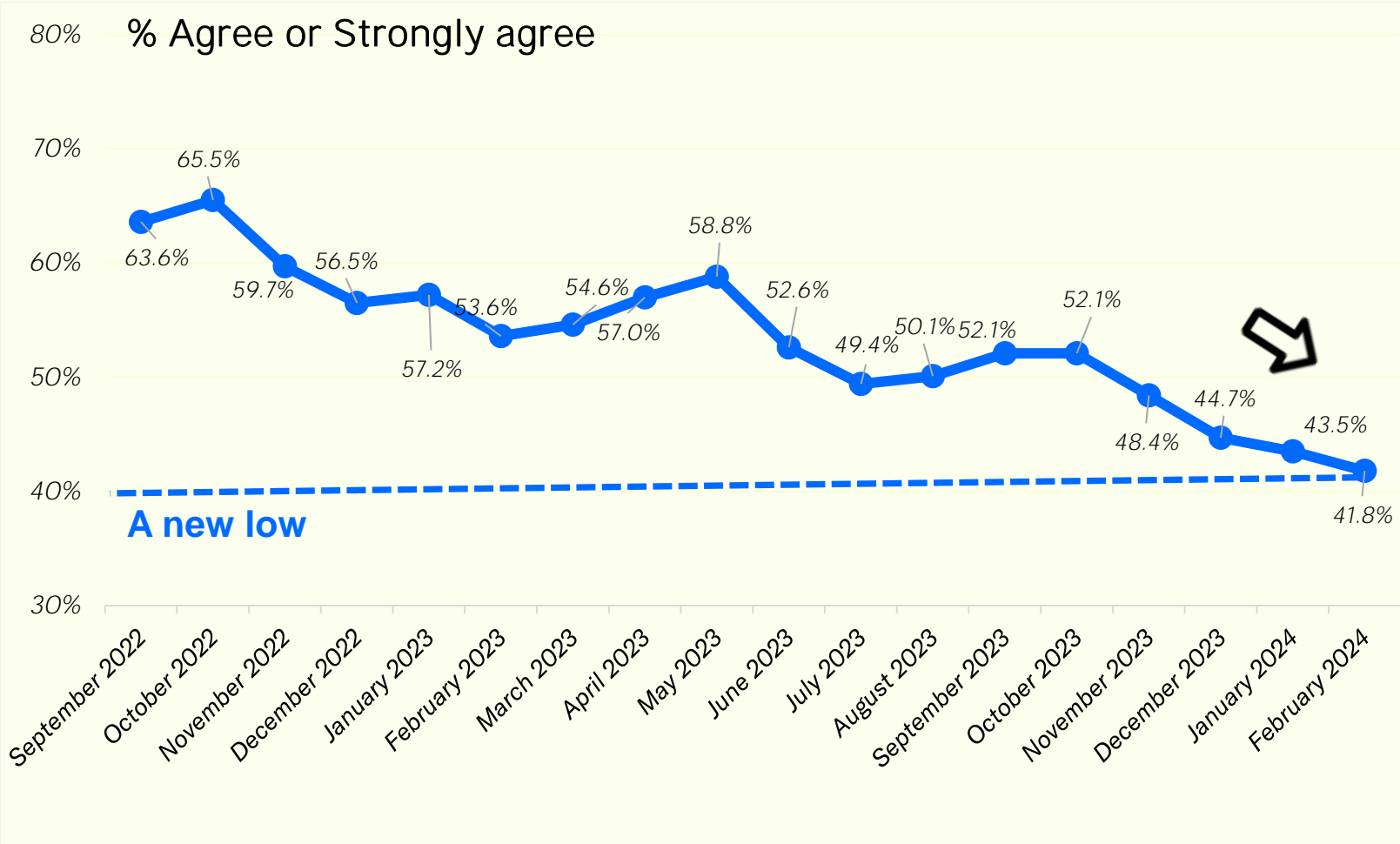
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



However, the majority American travelers no longer expect a pending recession

Statement:

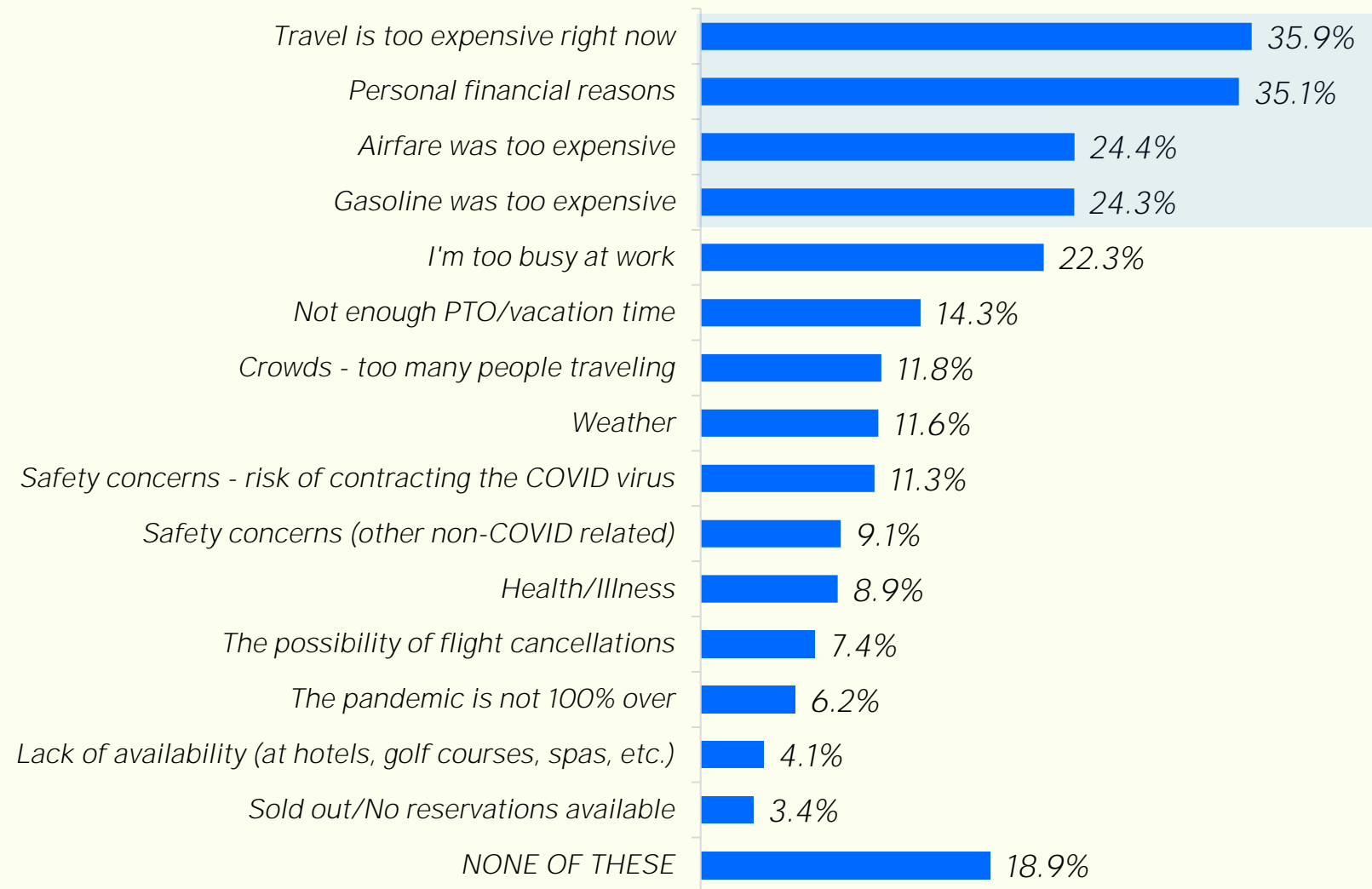
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



High costs remain the top impediment to travel

Question:

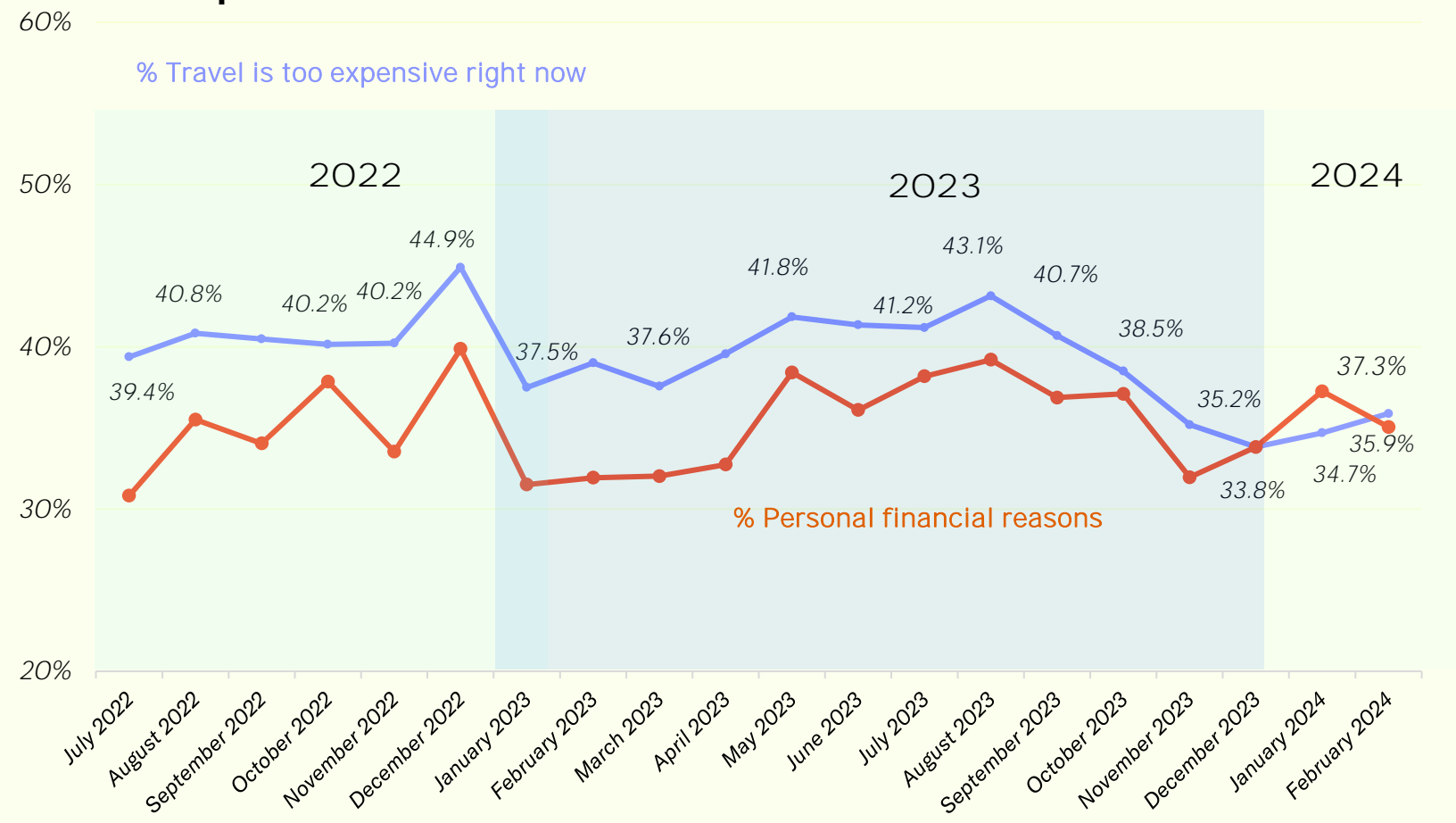
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Travel being too expensive lessened as a deterrent starting last Fall—Personal financial reasons began an uptick

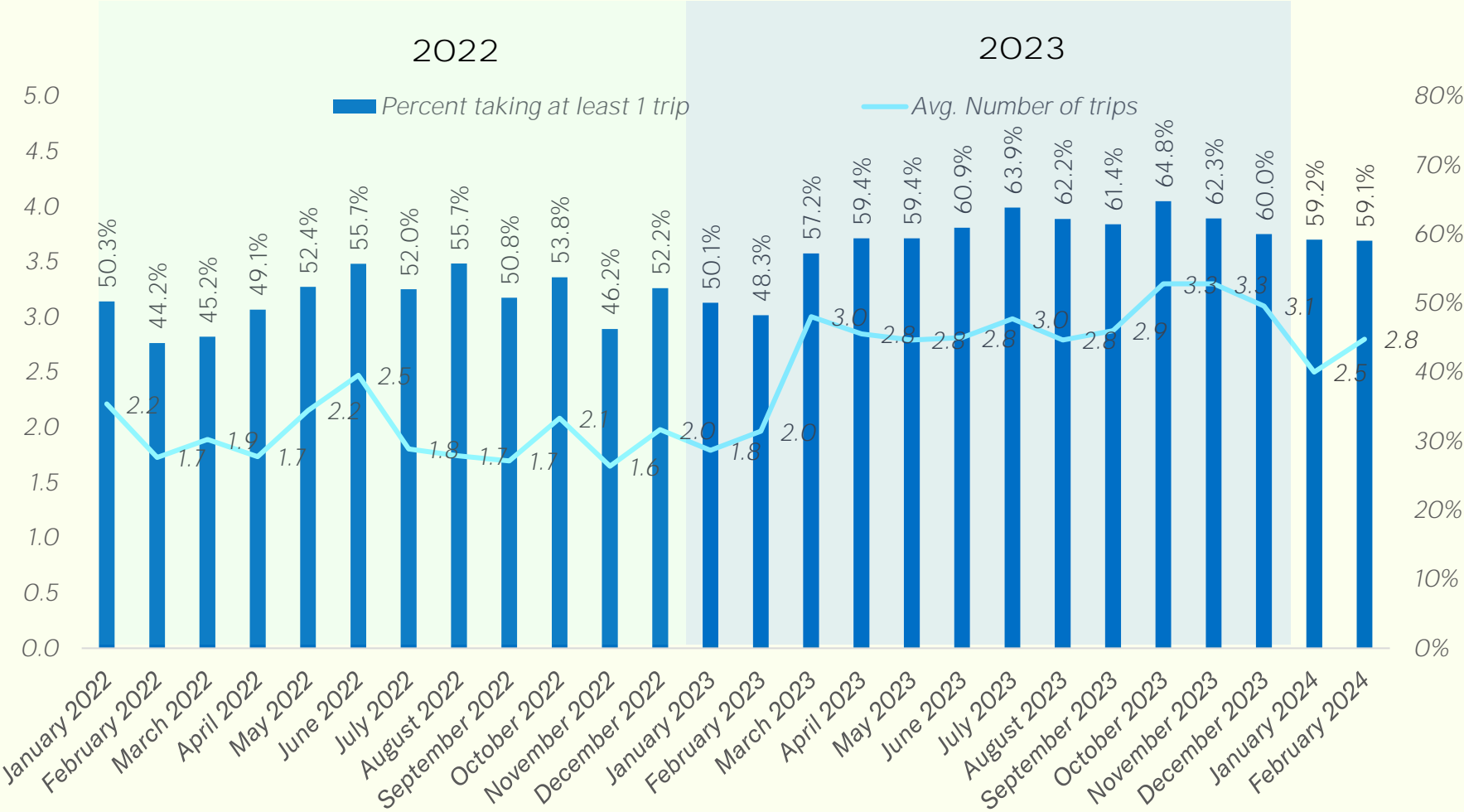
Question:

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)



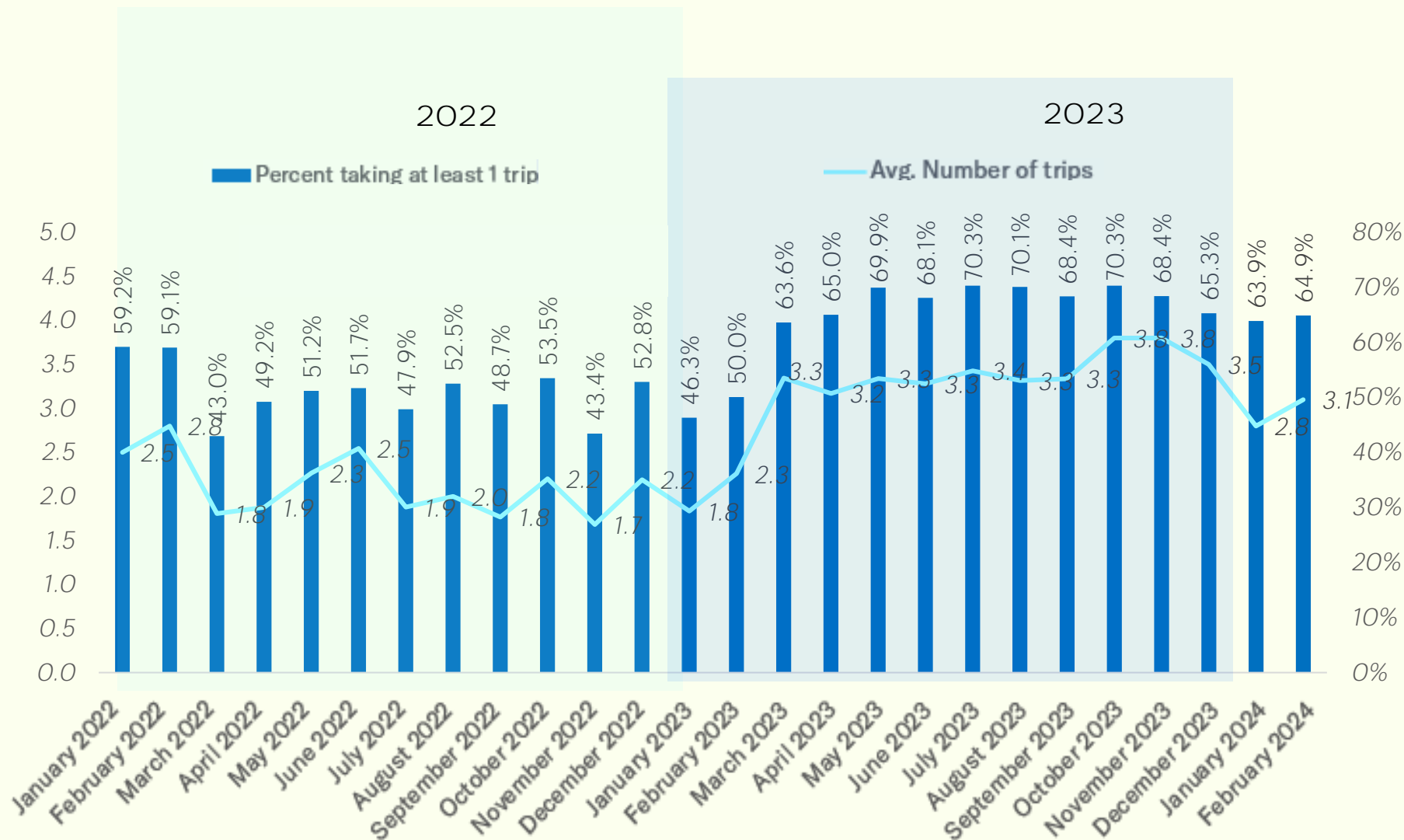
Overnight trip volume increased in the past month

Question:
How many OVERNIGHT trips of each type have you taken in the PAST MONTH?



Day trip volume also increased

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



Looking Forward



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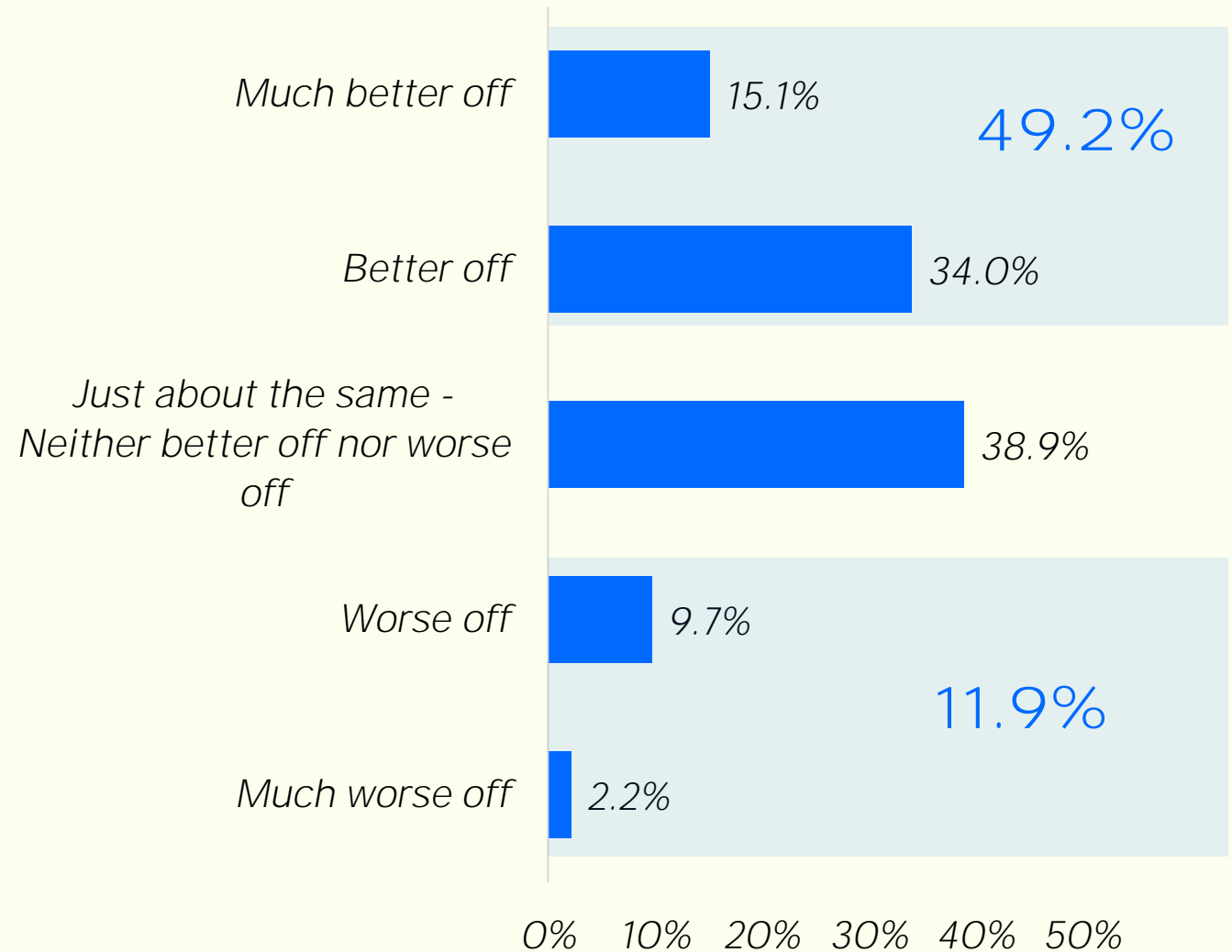
Travelers are still largely optimistic about their future finances--and continue to hold high levels of excitement for travel.



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

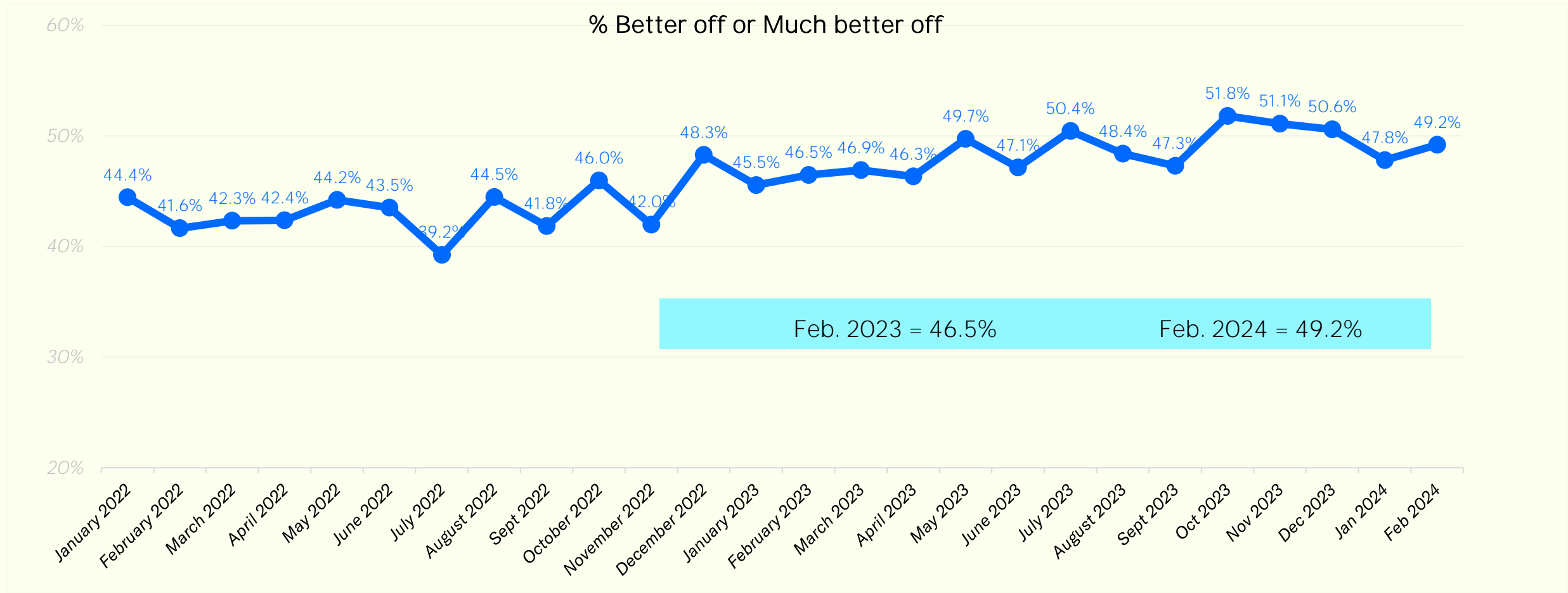
Question:

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



Financial optimism is up relative to last year

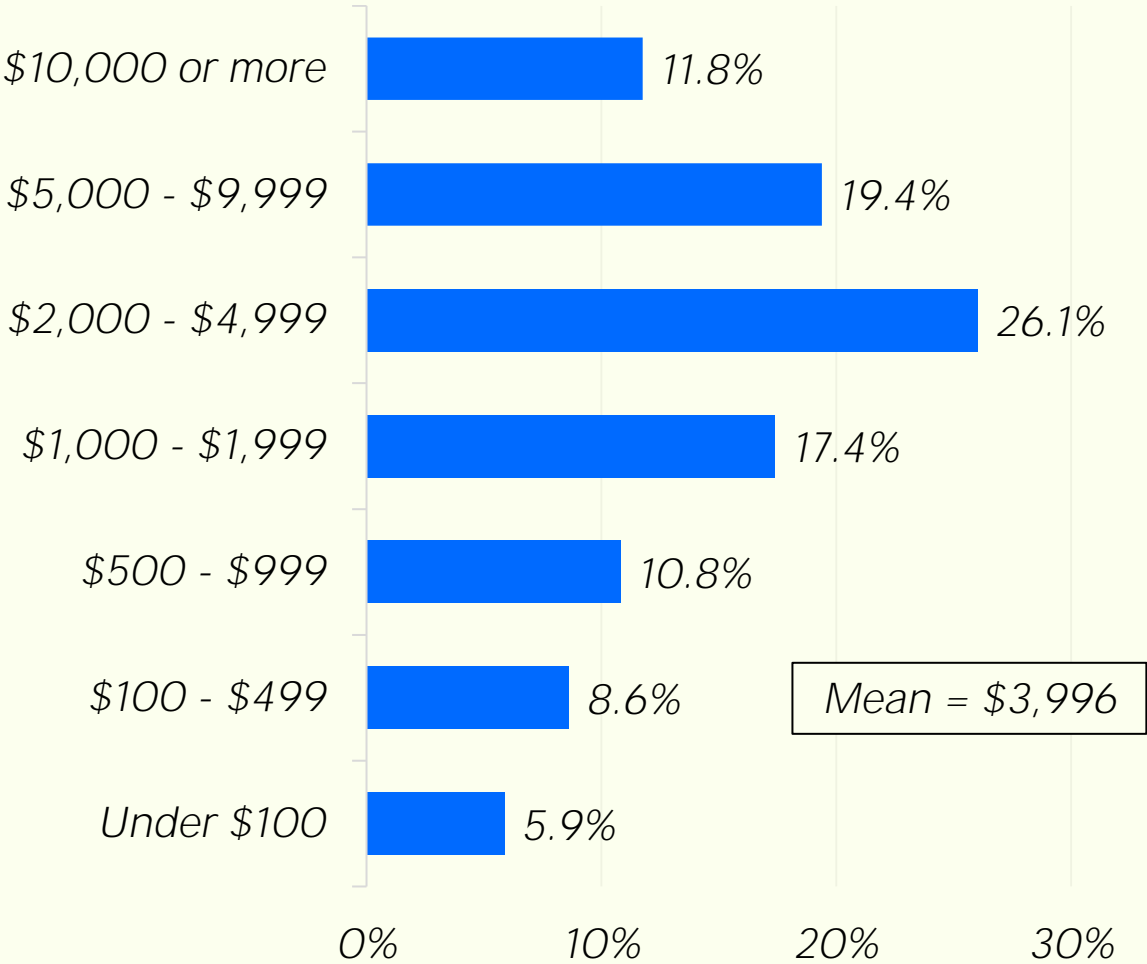
Question:
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Anticipated leisure travel budgets are at \$3996

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?*

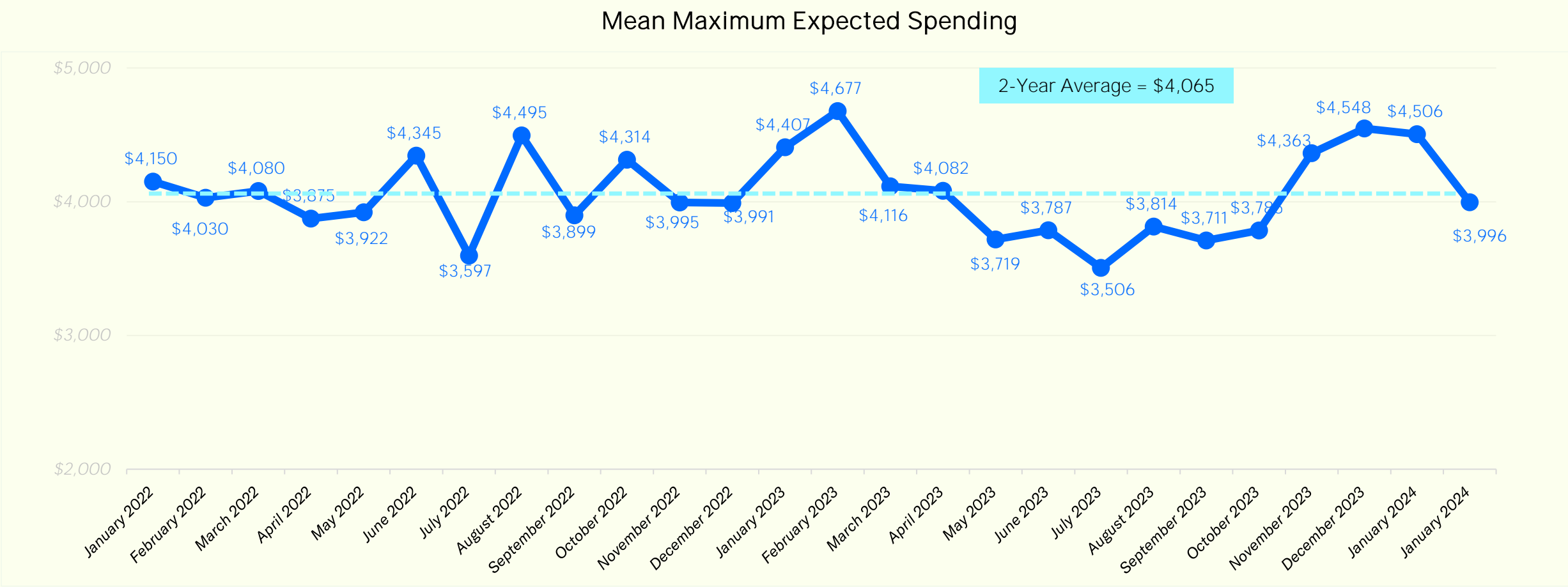
Maximum I would spend on leisure travel (next 12 months):



Travel budgets decreased sharply this month but are near their recent average

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):

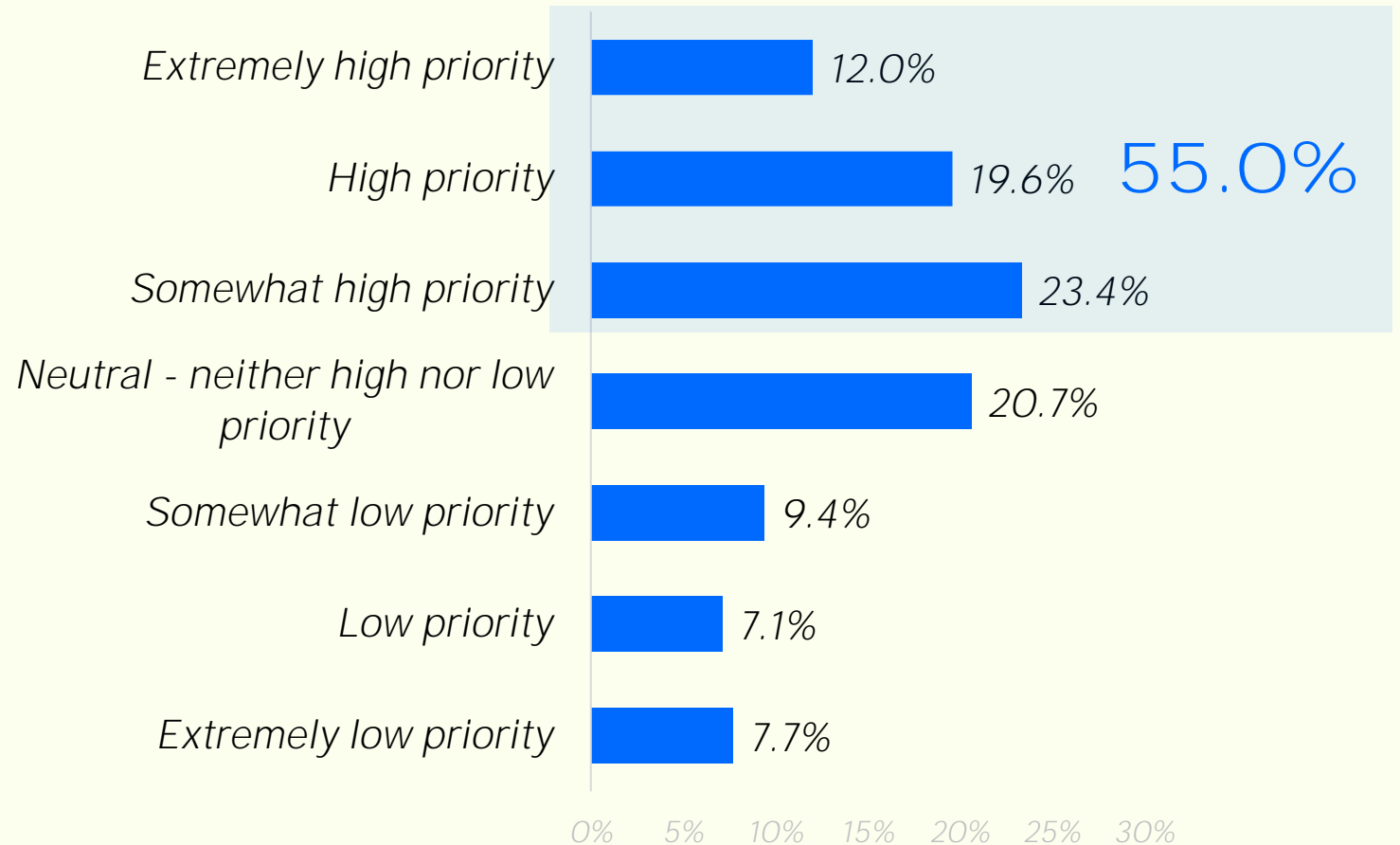


Over half of American travelers intend to make leisure travel a spending priority in the next three months

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.

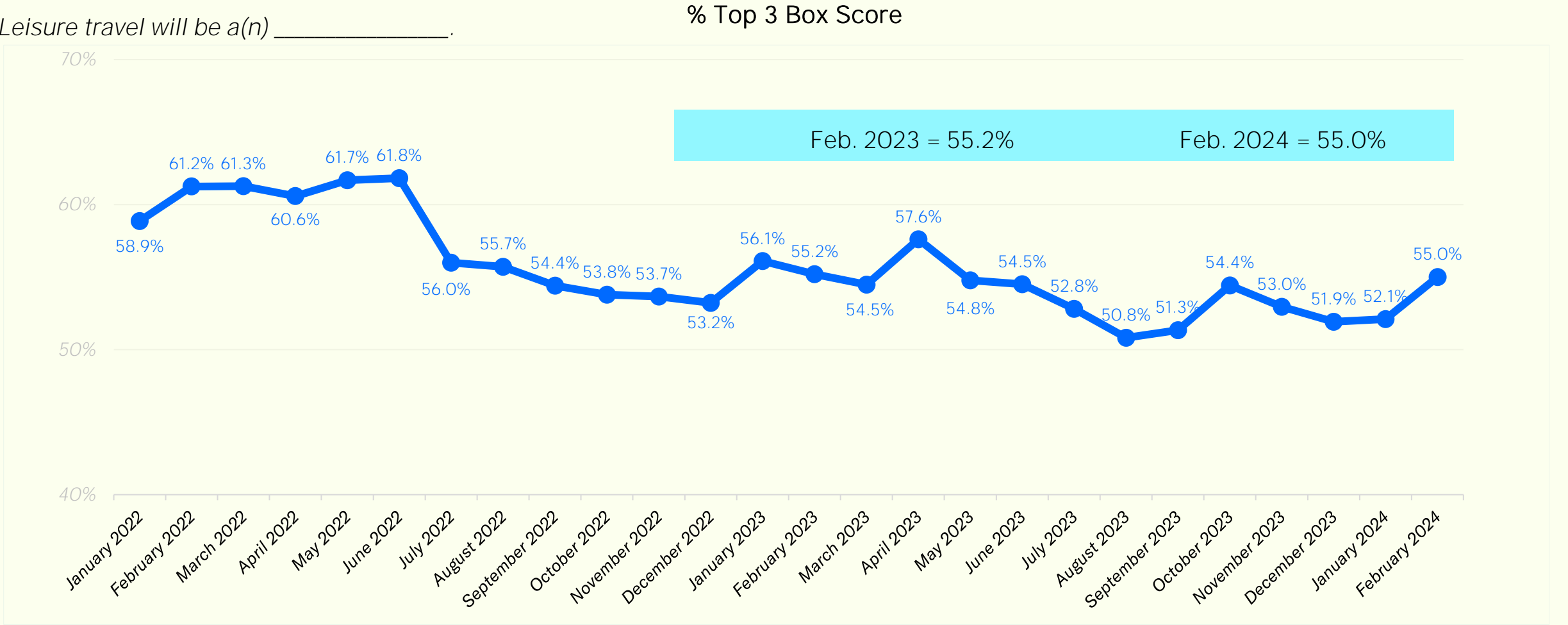
Leisure travel will be a(n)



Budget prioritization of travel is on par with 2023 levels

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.

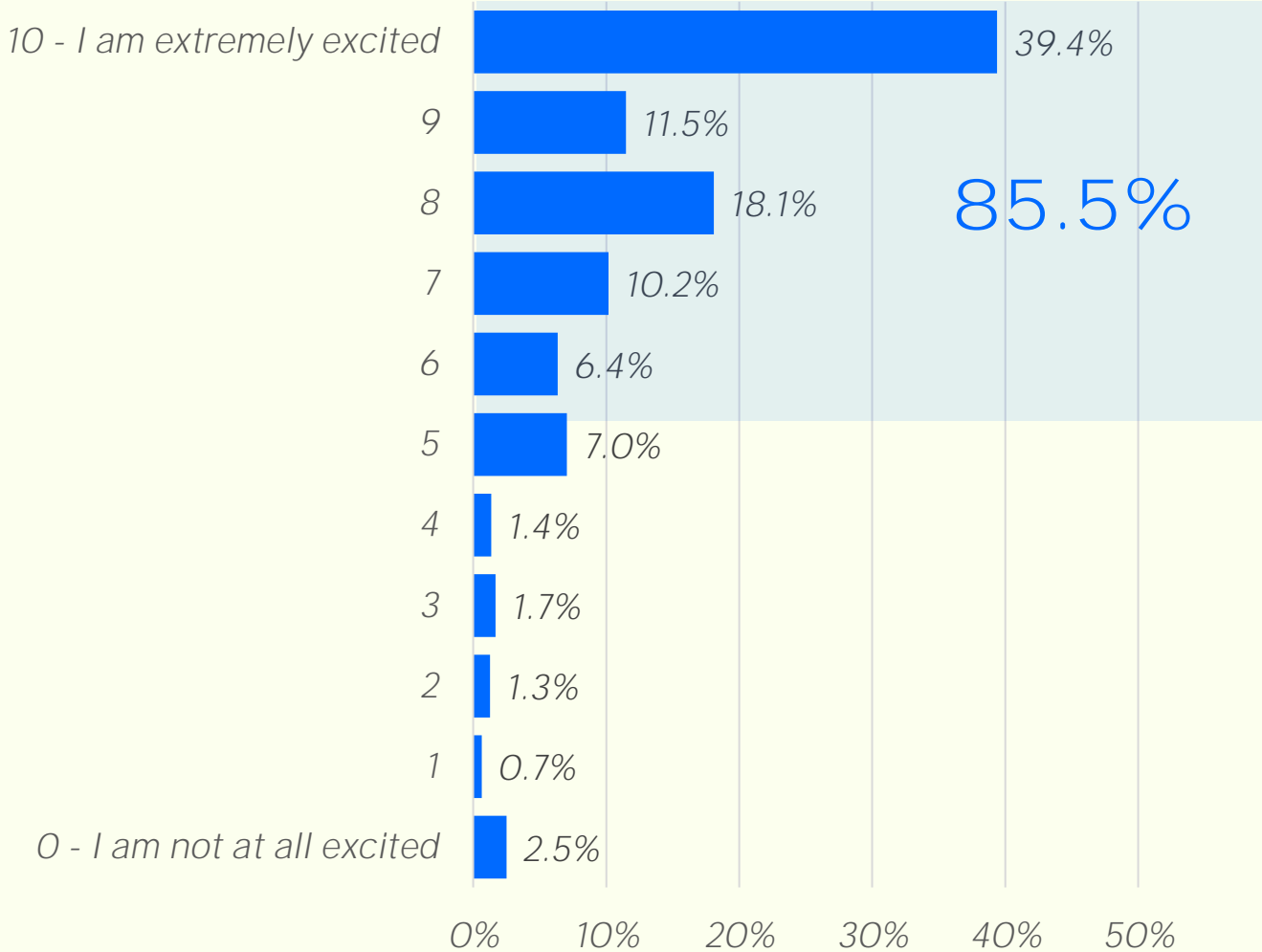
Leisure travel will be a(n) _____.



Excitement for travel remains elevated

Question:

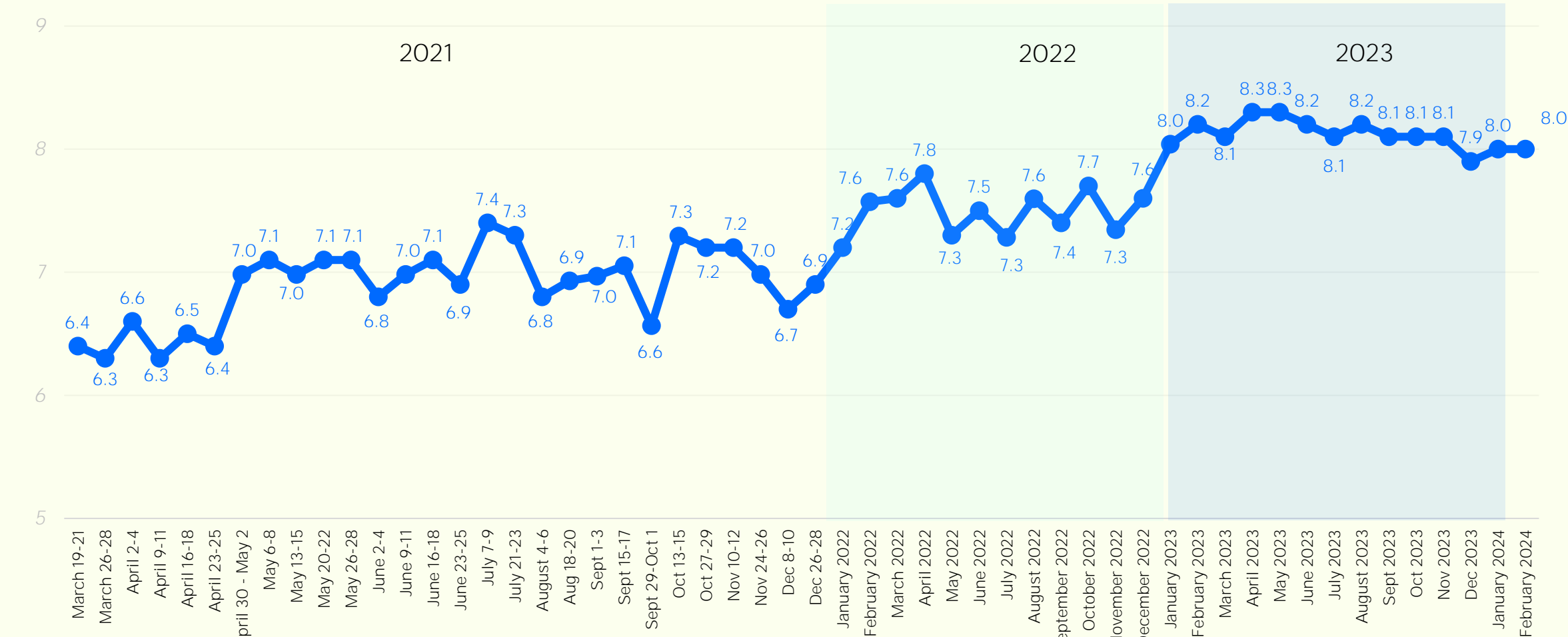
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



Excitement for travel is holding steady

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

Mean Score on 11-point Scale



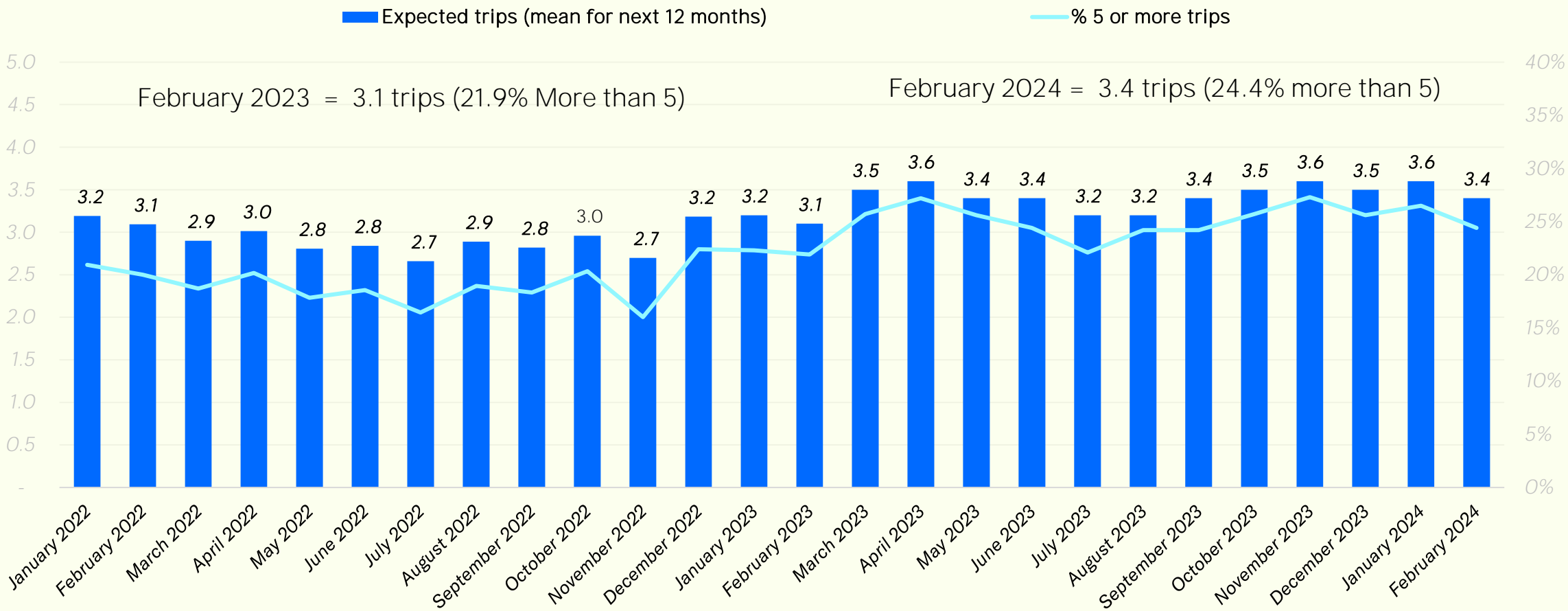
Expectations for future travel decreased slightly this month



Future trip volume expectations decreased in the last month but are above 2023 levels

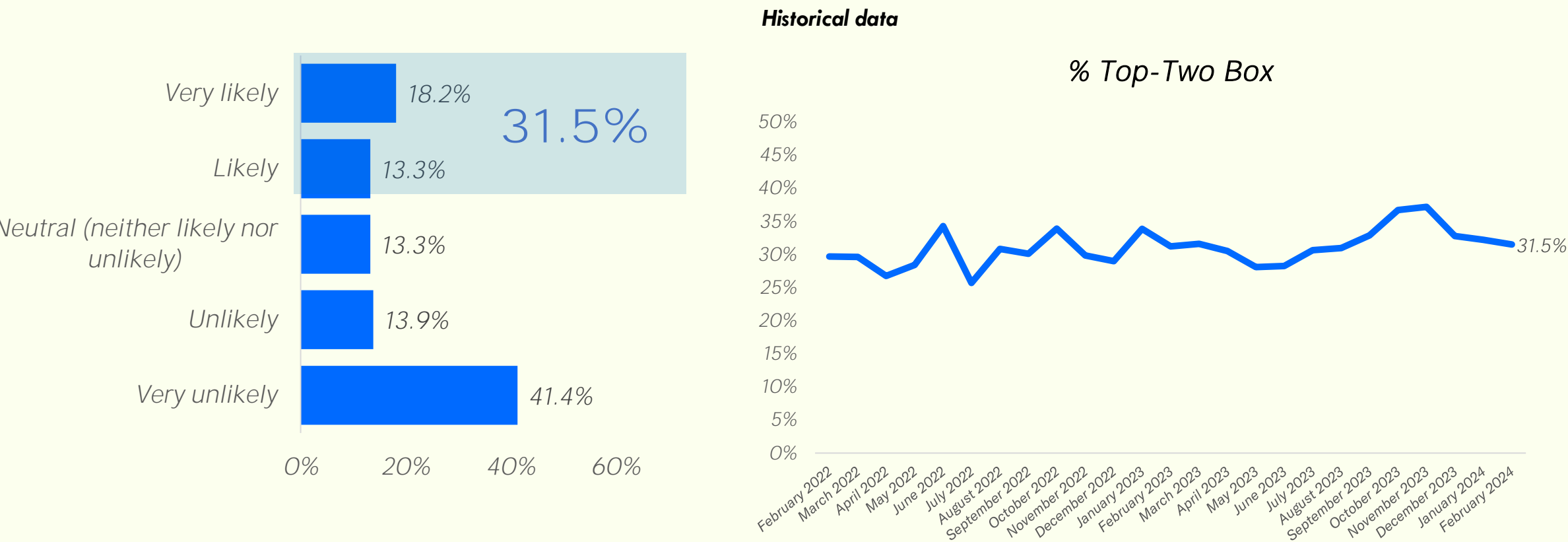
Question:

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 internationally in the next 12 months dipped very slightly this month

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



Travel & Michelin-Starred Restaurants

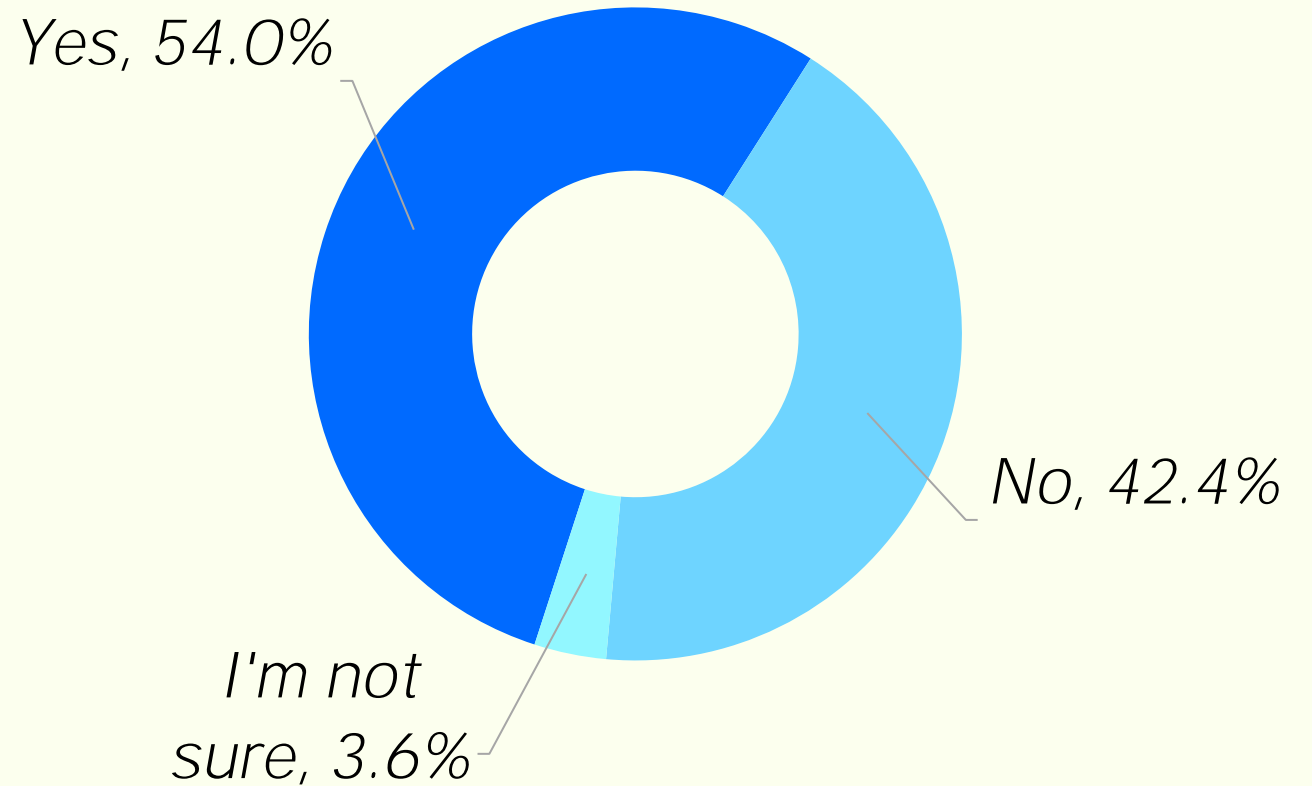
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54% of American Travelers have Awareness of the Michelin Restaurant Rating System

Question:

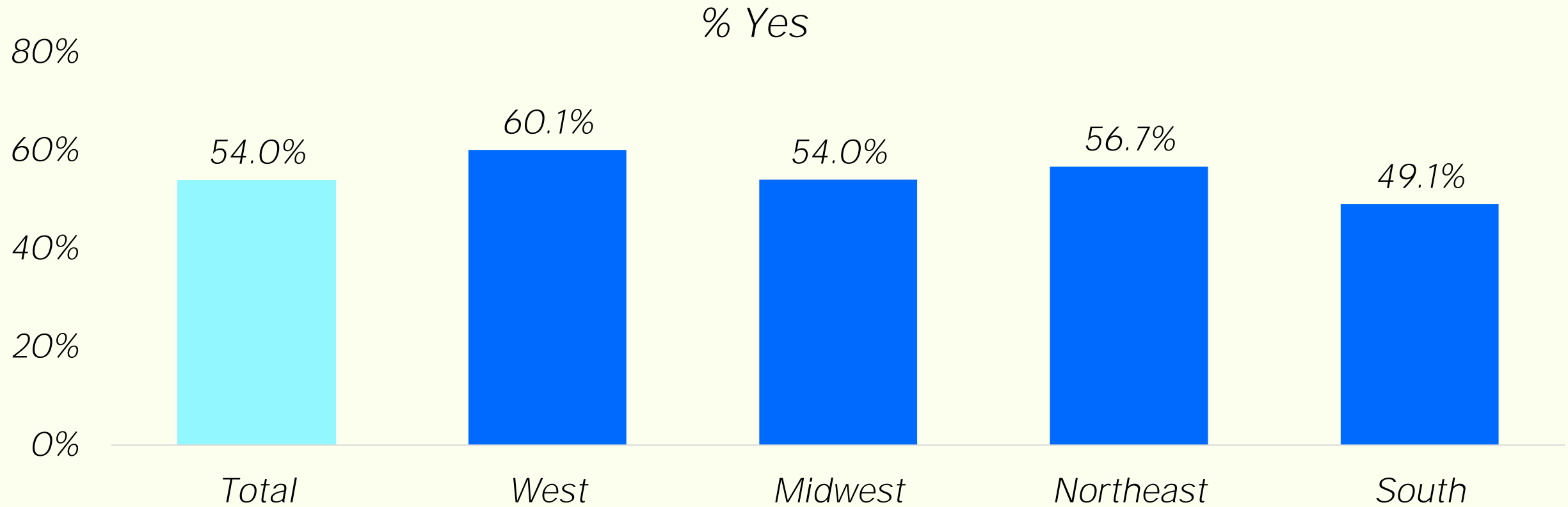
Prior to taking this survey, had you heard of the Michelin restaurant rating system?



(Base: All respondents, 4,081 completed surveys. Data collected February 16-24, 2024.)

Awareness of the Michelin Restaurant Rating System By Region is Highest among Travelers in the West and Northeast

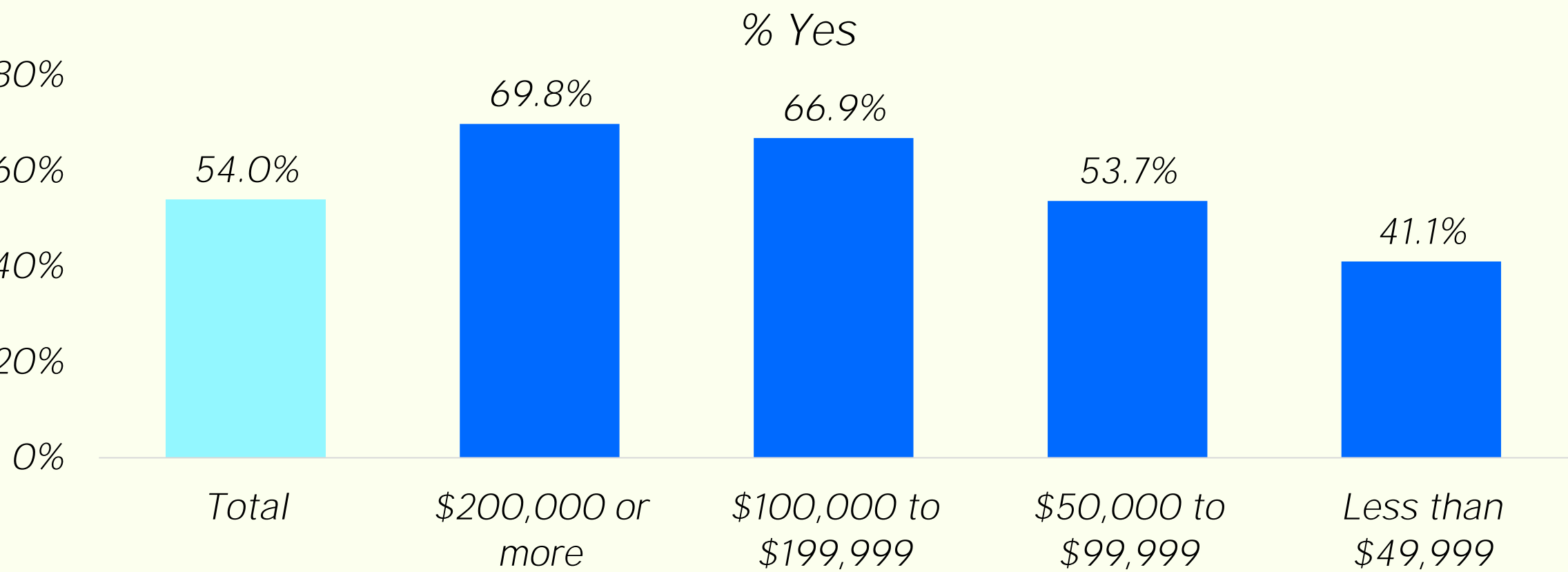
Question: *Prior to taking this survey, had you heard of the Michelin restaurant rating system?*



(Base: All respondents, 4,081 completed surveys. Data collected February 16-24, 2024.)

Awareness of Michelin Restaurant Rating System is Strongest among Higher-Income Households

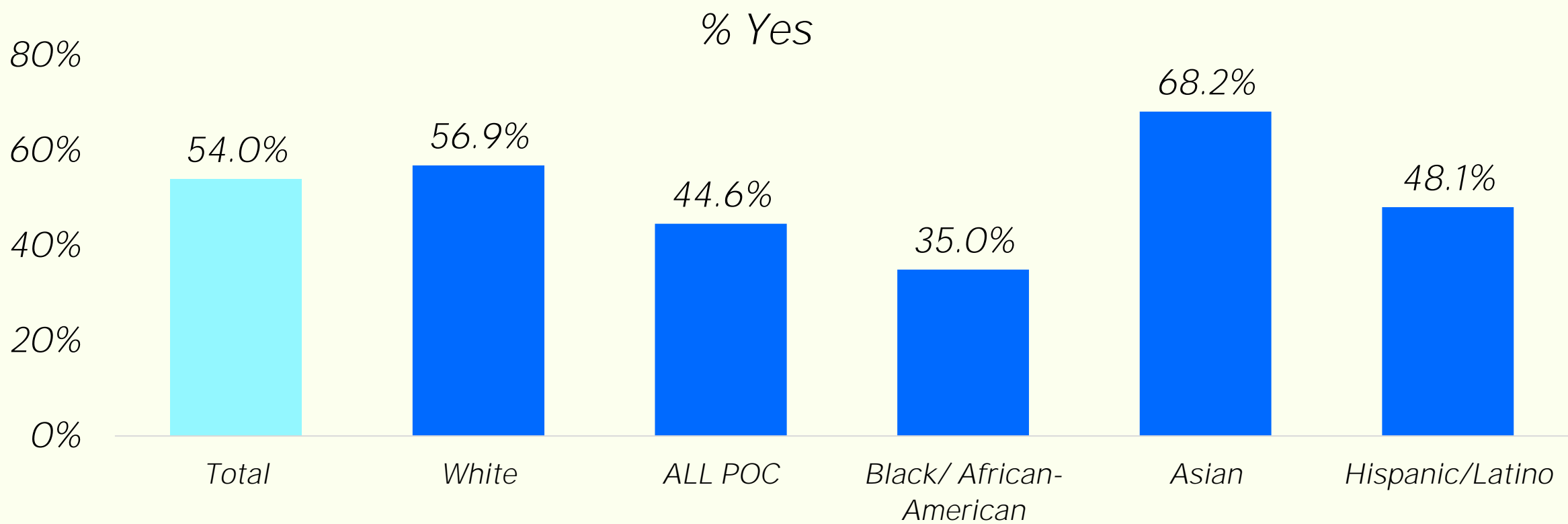
Question: *Prior to taking this survey, had you heard of the Michelin restaurant rating system?*



(Base: All respondents, 4,081 completed surveys. Data collected February 16-24, 2024.)

Awareness of the Michelin Restaurant Rating System is Highest among Asian-American Travelers

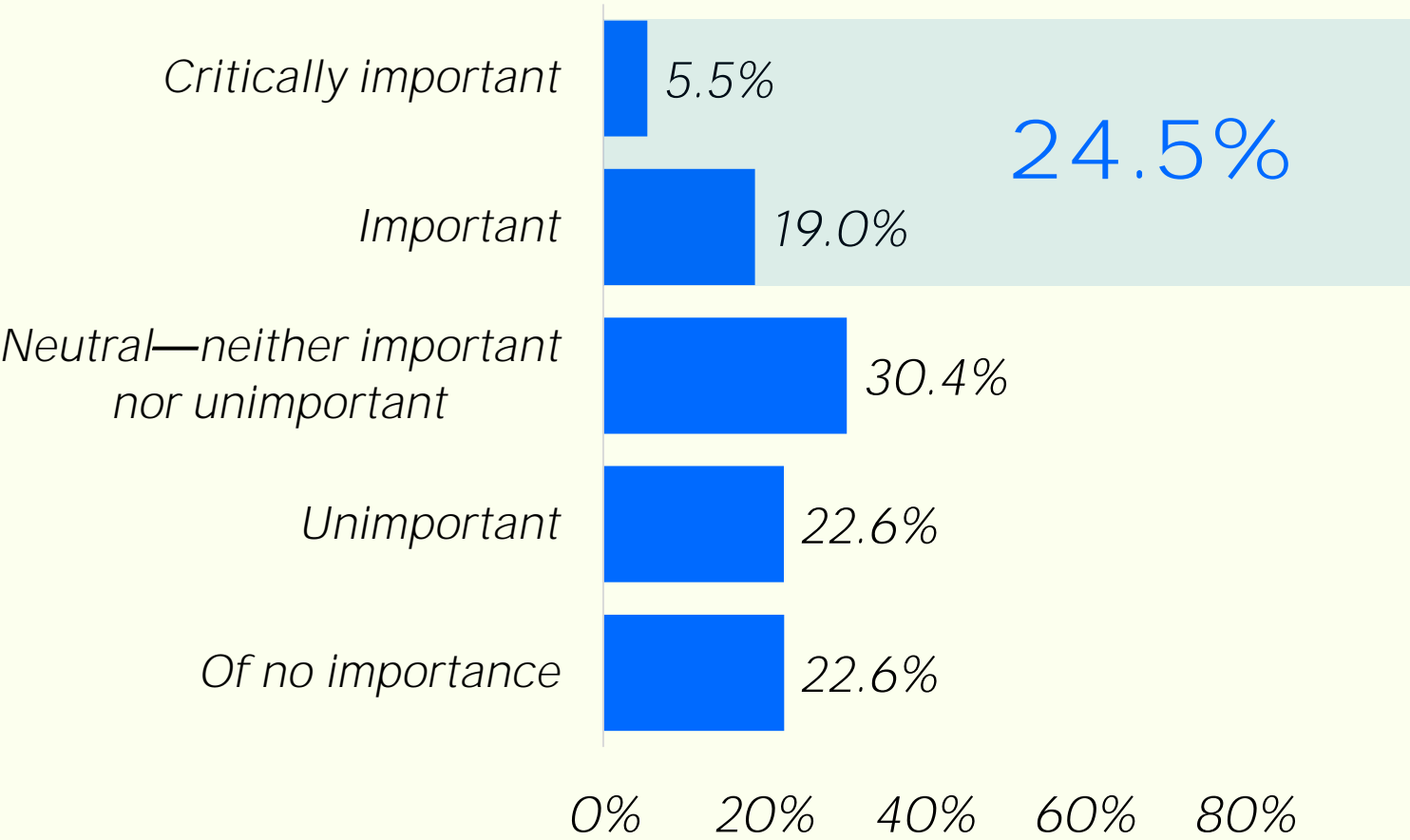
Question: *Prior to taking this survey, had you heard of the Michelin restaurant rating system?*



(Base: All respondents, 4,081 completed surveys. Data collected February 16-24, 2024.)

Among Michelin-Aware Travelers, a Quarter say that the Existence of Michelin-Starred Restaurants is Important to their Destination Selection

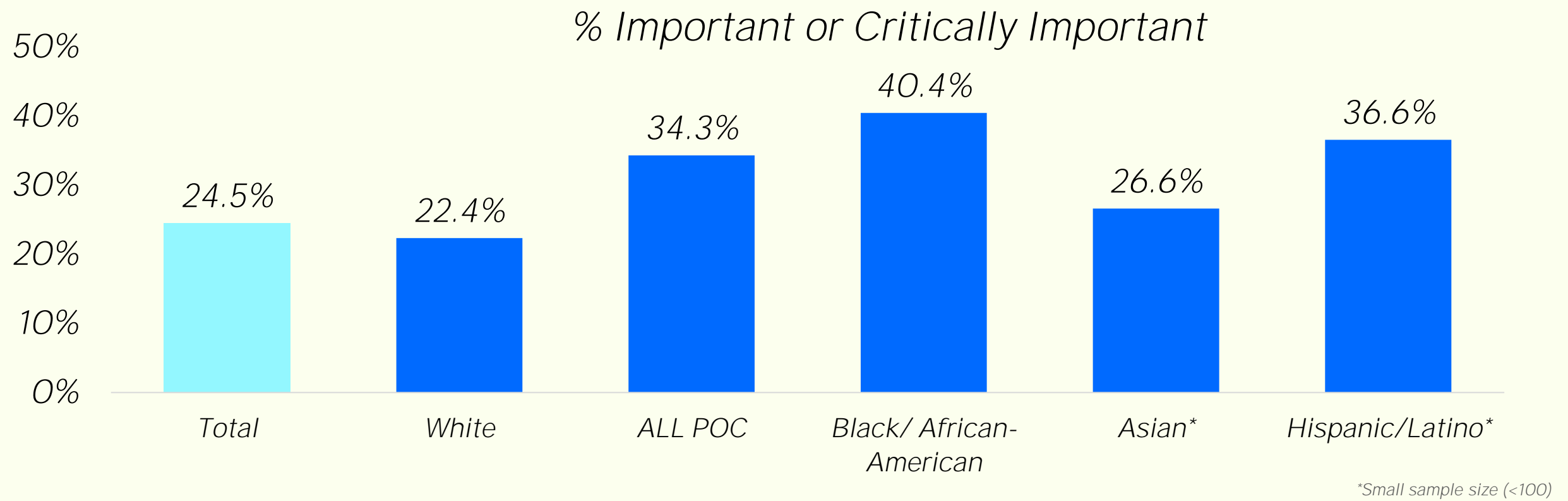
Question:
When you select the destinations you visit, how generally important is it that they have Michelin-starred restaurants?



(Base: Respondents who are aware of the Michelin rating system, 2,258 completed surveys. Data collected February 16-24, 2024.)

The Importance of Michelin-Starred Restaurants in Destination Selection is Higher among BIPOC Travelers (who are Michelin-aware)

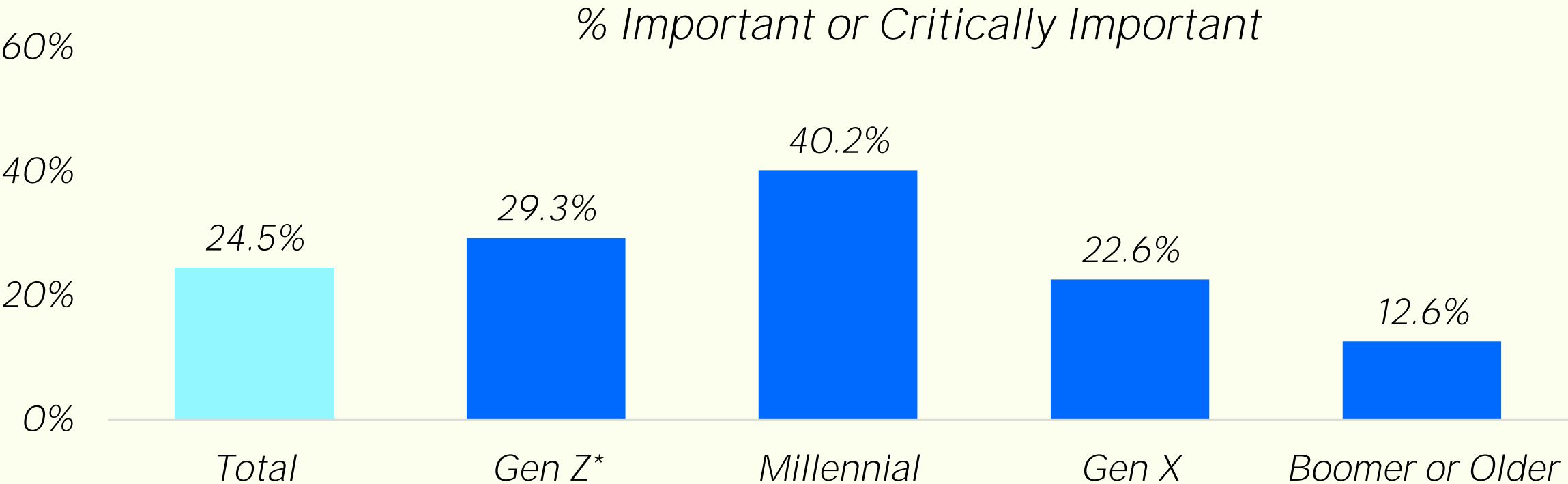
Question: *When you select the destinations you visit, how generally important is it that they have Michelin-starred restaurants?*



(Base: Respondents who are aware of the Michelin rating system, 2,258 completed surveys. Data collected February 16-24, 2024.)

The Importance of Michelin-Starred Restaurants in Destination Selection is Strongest among Millennial-age Travelers

Question: *When you select the destinations you visit, how generally important is it that they have Michelin-starred restaurants?*

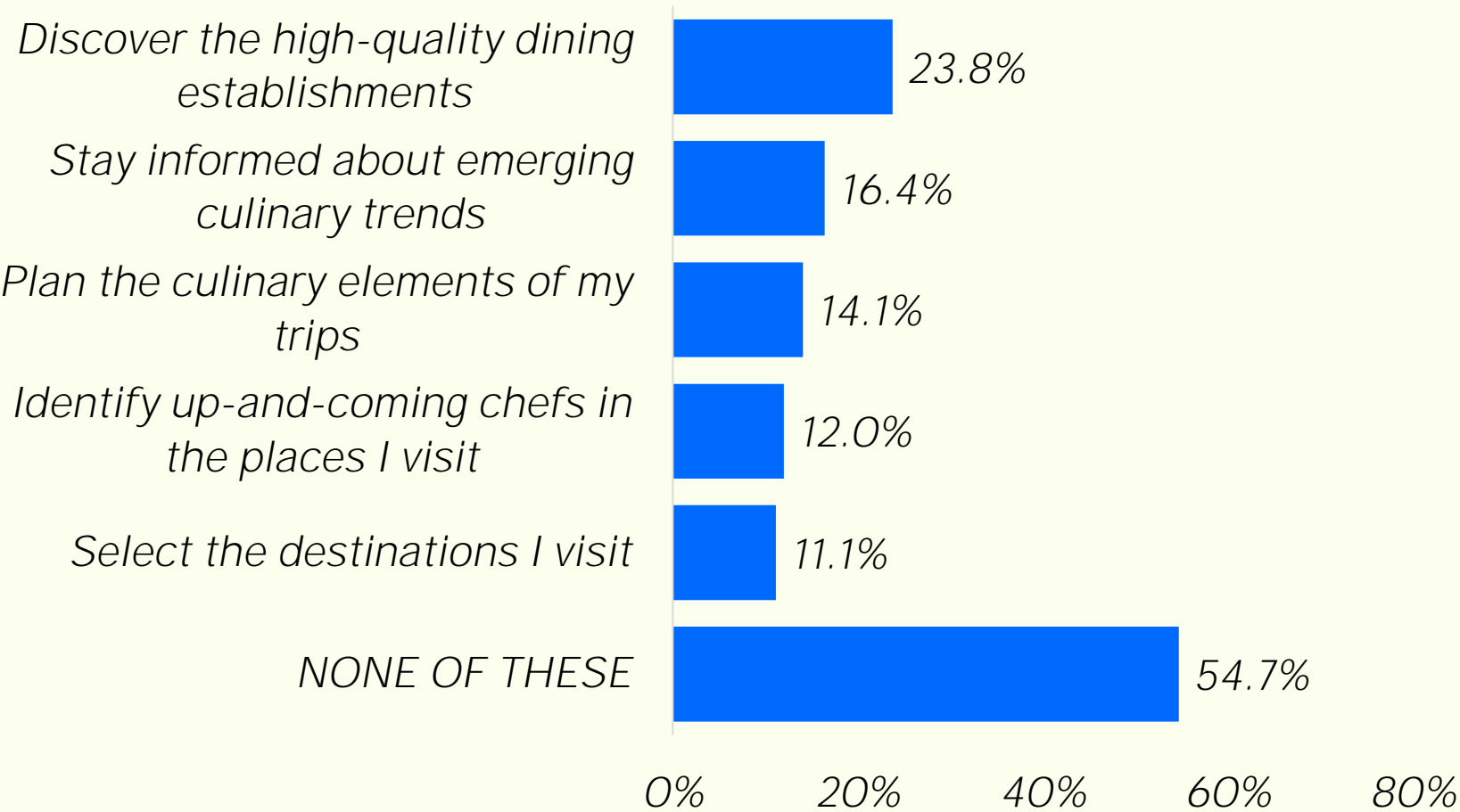


**Small sample size (<100)*

Ways in which the Michelin Restaurant Rating System is Used by Michelin-Aware Travelers

Question:
Which (if any) describes how you use the Michelin restaurant rating program? (Select all that accurately complete the sentence)

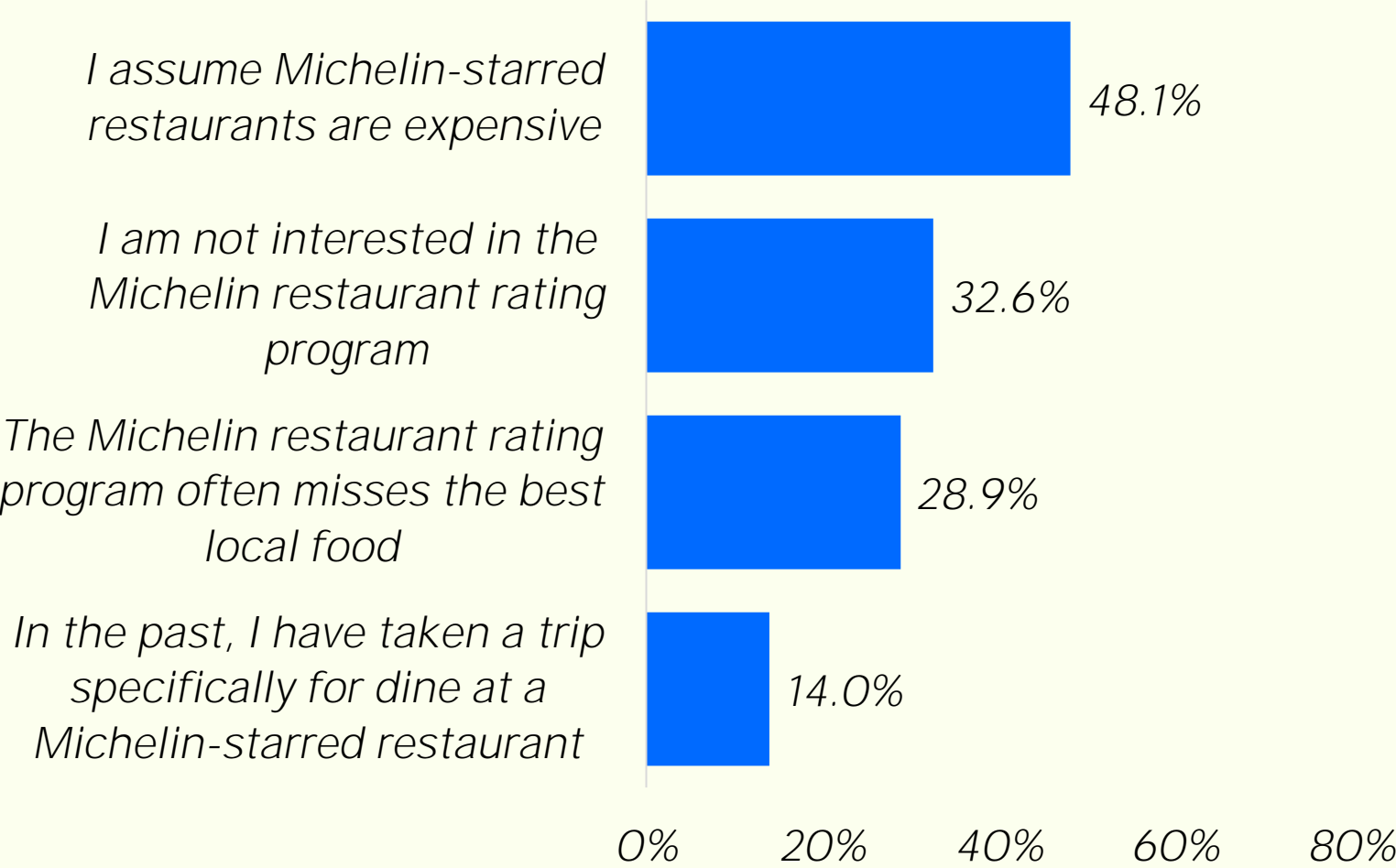
When traveling, I use the Michelin-restaurant rating program to _____.



(Base: Respondents who are aware of the Michelin rating system, 2,258 completed surveys. Data collected February 16-24, 2024.)

Michelin-Aware Travelers' Opinions on the Michelin Restaurant Rating System

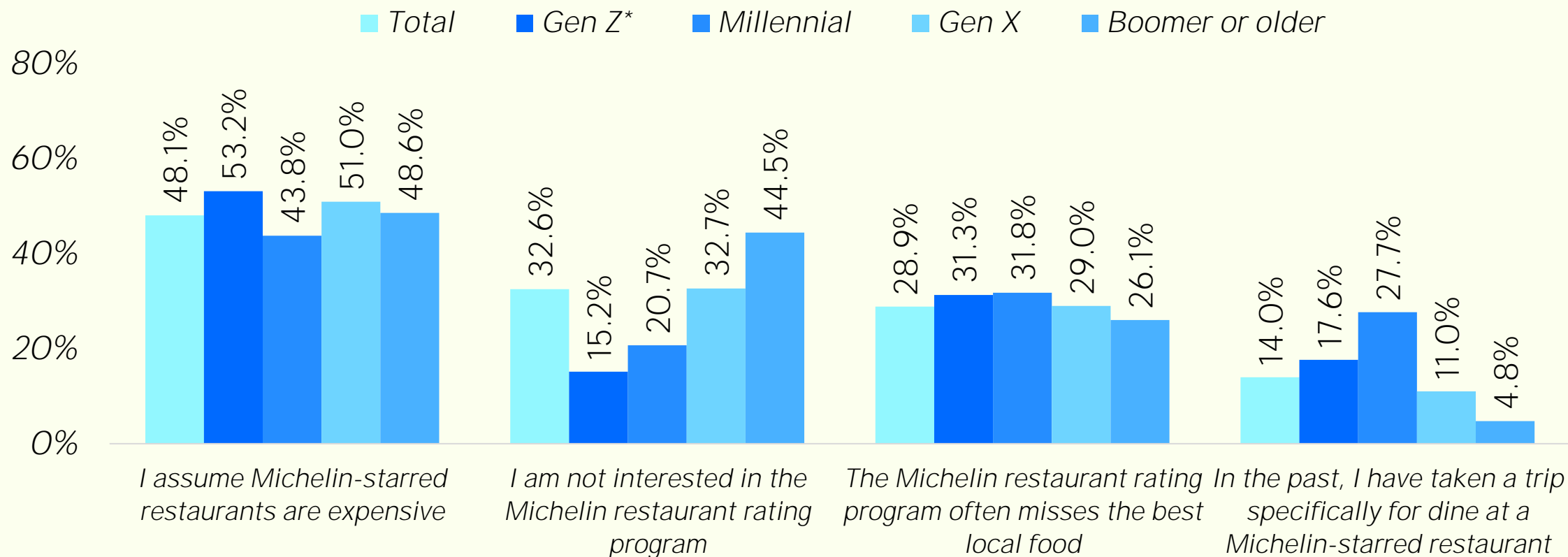
Question:
Which of these statements accurately describe your opinion of Michelin restaurant rating system?



(Base: Respondents who are aware of the Michelin rating system, 2,258 completed surveys. Data collected February 16-24, 2024.)

Millennial-age Michelin-**Aware Travelers**’ are Most Likely Generation to have Taken a Trip Specifically to Dine at a Michelin-Starred Restaurant

Question: Which of these statements accurately describe your opinion of Michelin restaurant rating system?



(Base: Respondents who are aware of the Michelin rating system, 2,258 completed surveys. Data collected February 16-24, 2024.)

*Small sample size (<100)

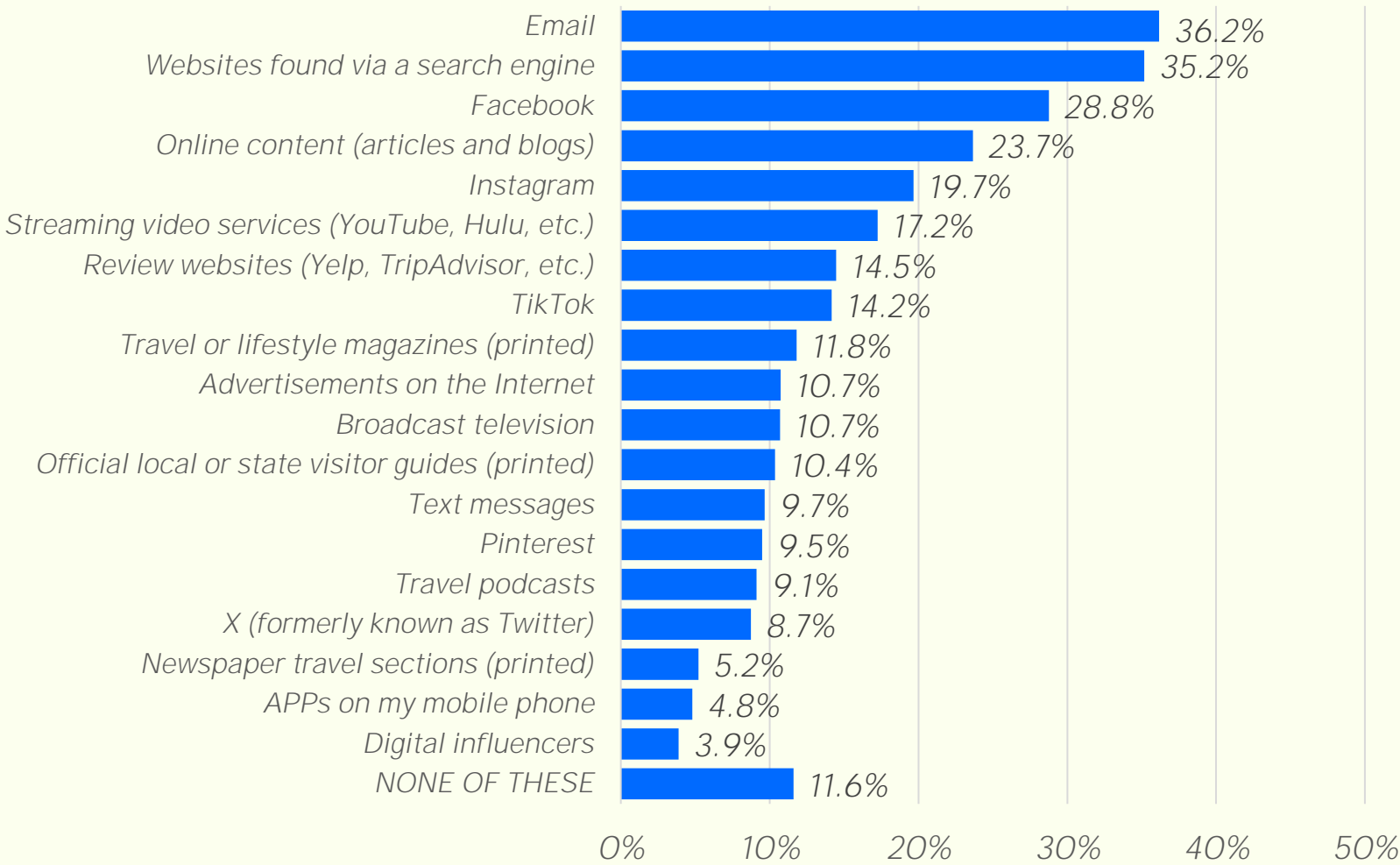
New Technologies and the American Traveler

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Generally, email, search engines and Facebook are seen as the most effective resources to inspire travelers

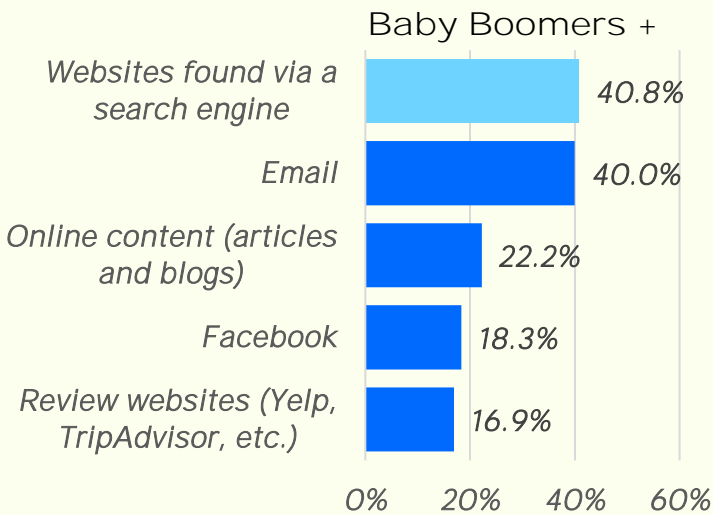
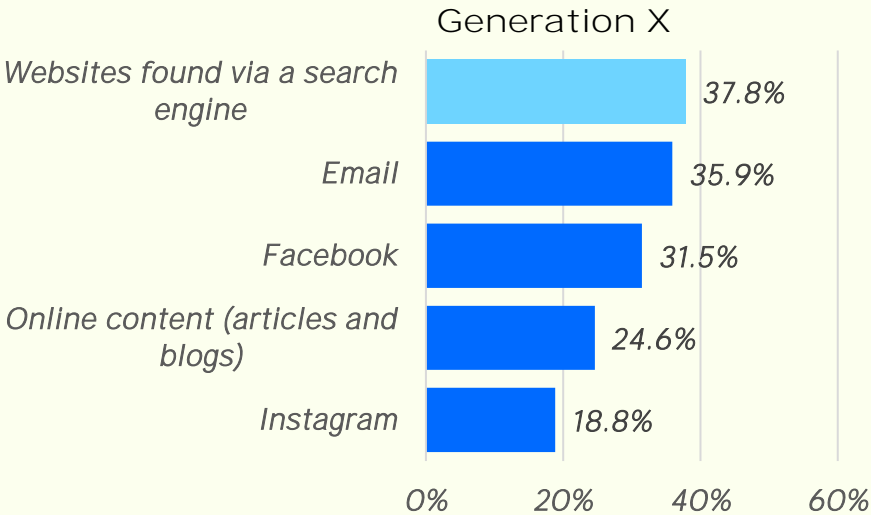
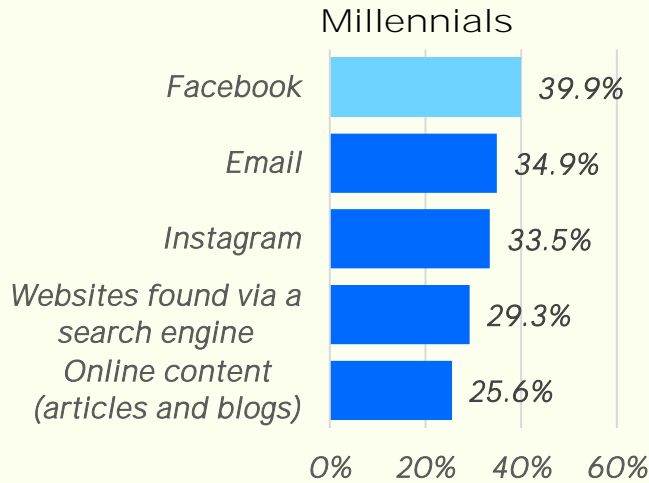
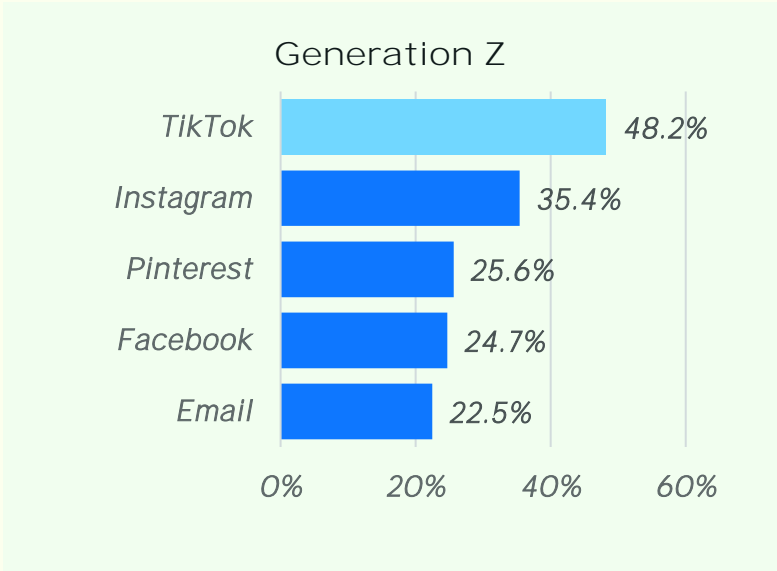
Question:
Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



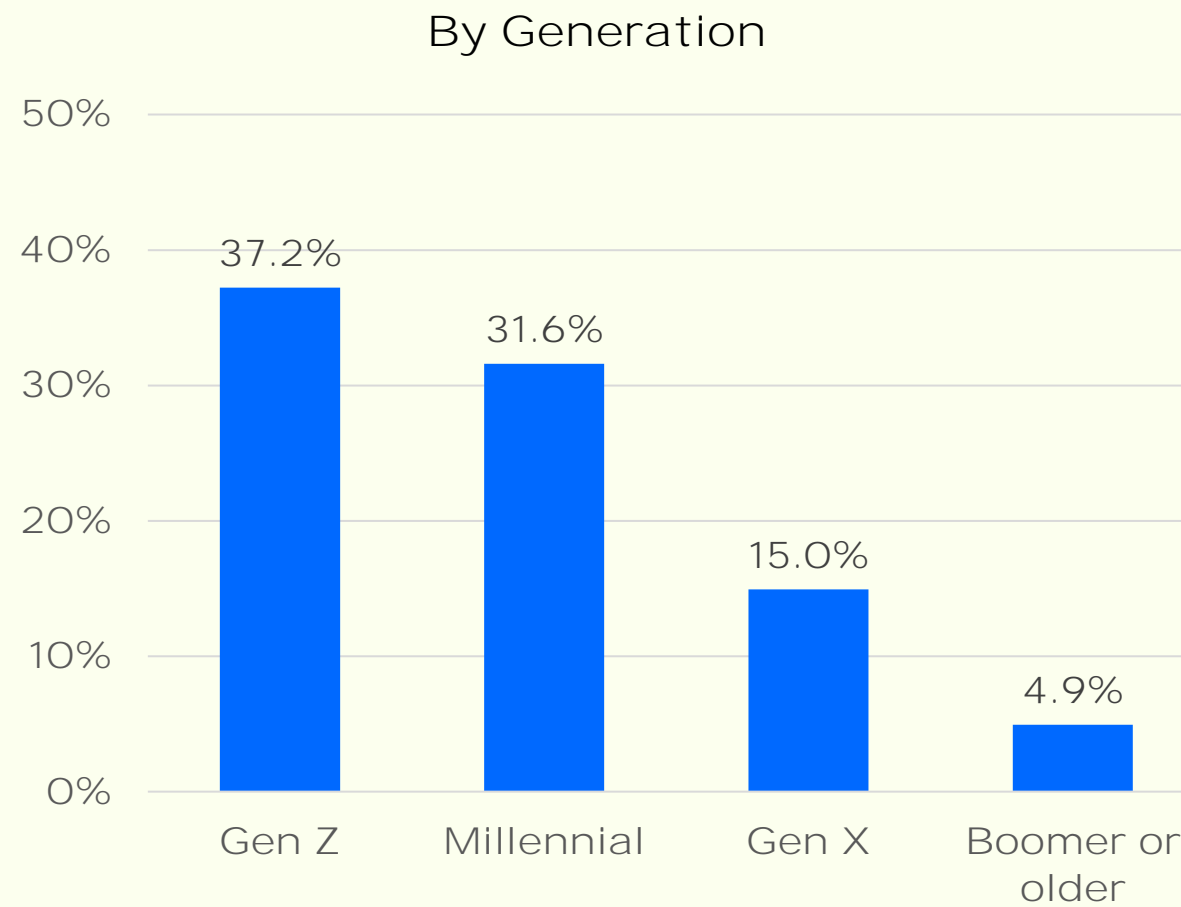
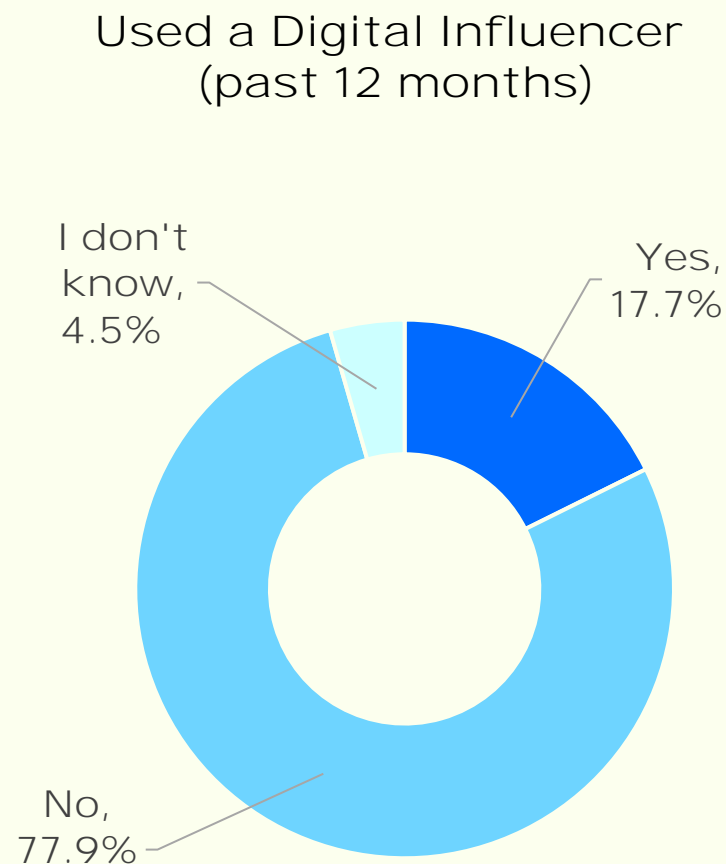
TikTok's power with GenZ is unrivaled

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)



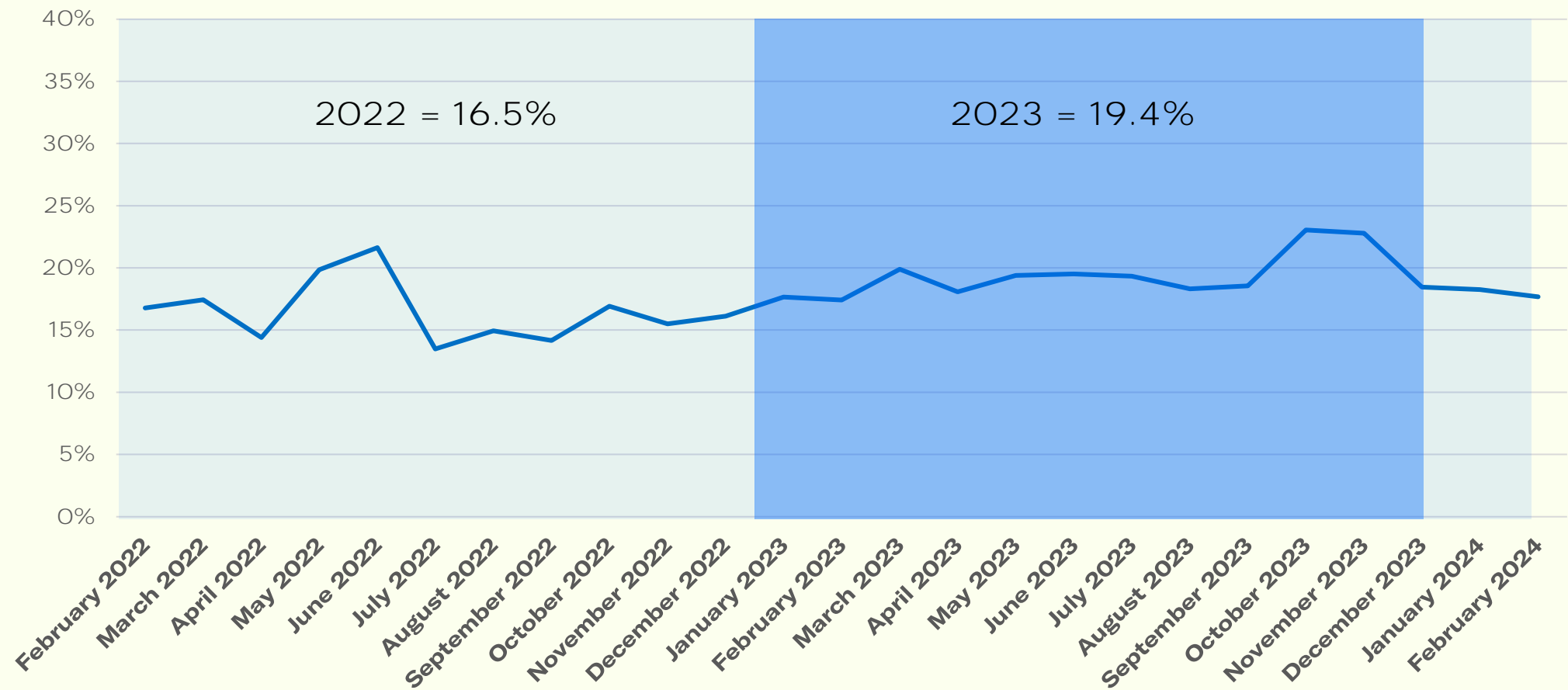
Digital influencers are used by almost 1-in-5 travelers.



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

Use of digital influencers increased slightly last year.

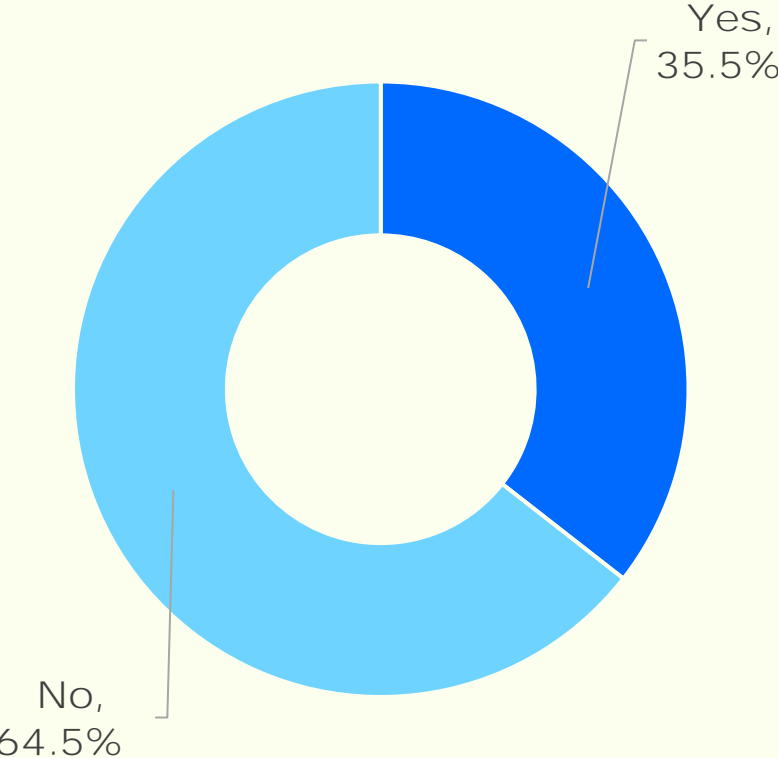
Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?



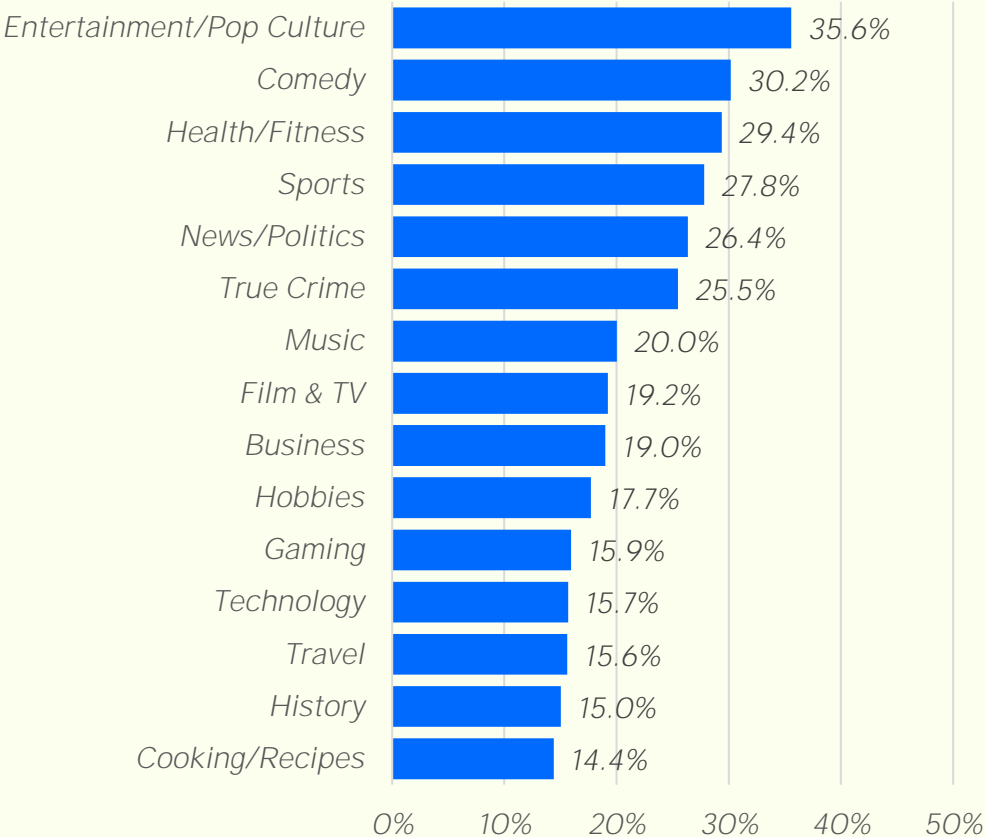
One-third of travelers regularly listen to podcasts

Question: What podcast genres do you listen to on a regular basis? (Select all that apply)

Podcasts (past 12 months)

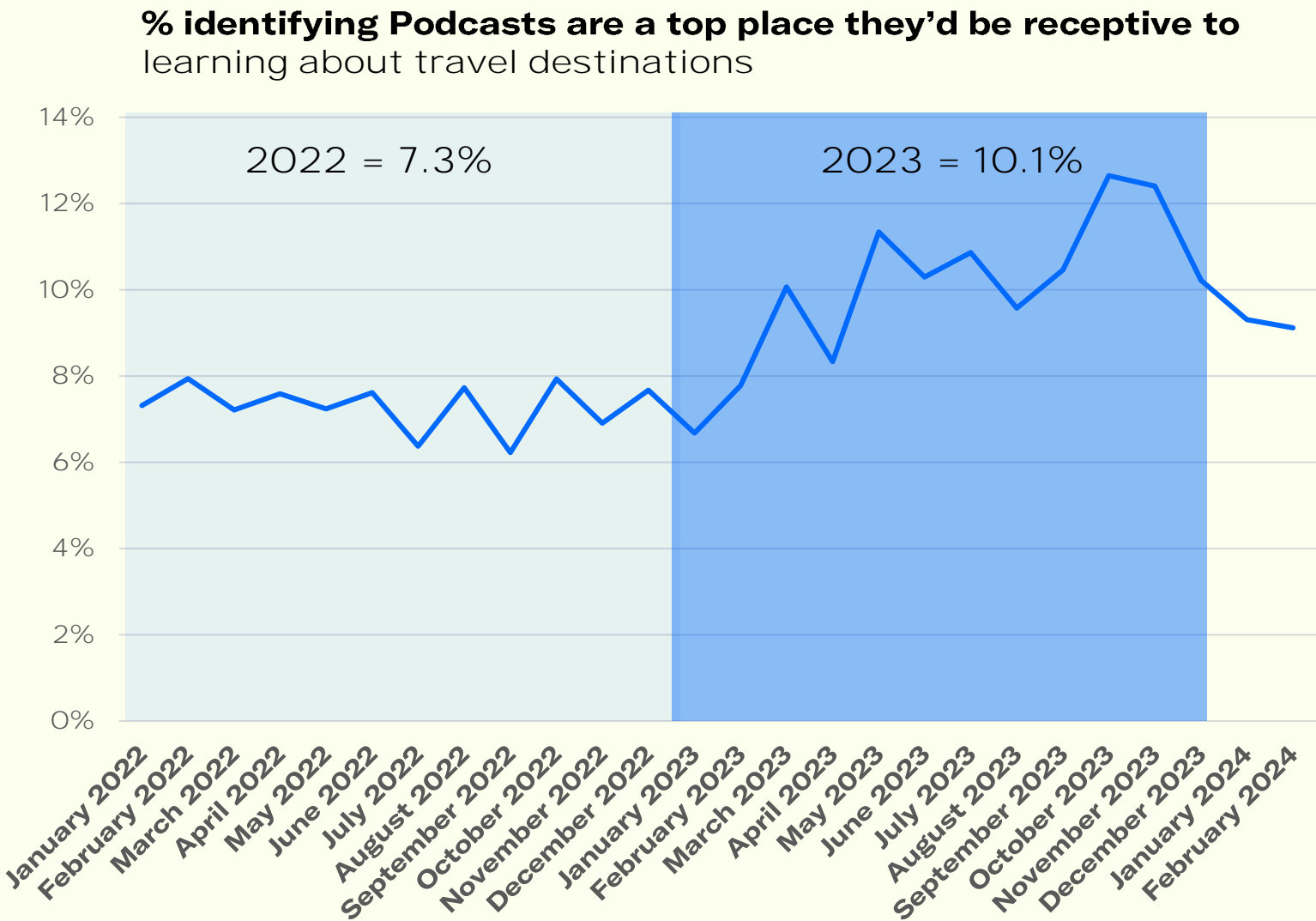


Top Podcast Genres



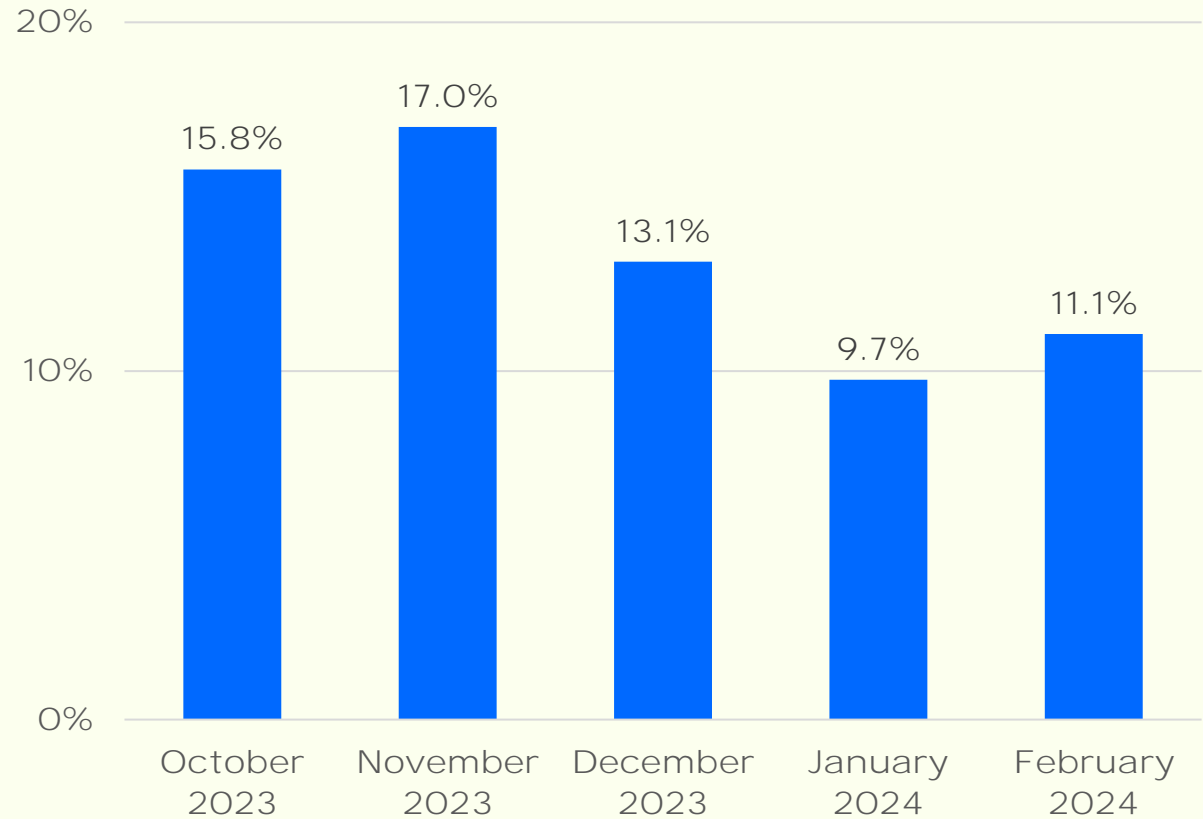
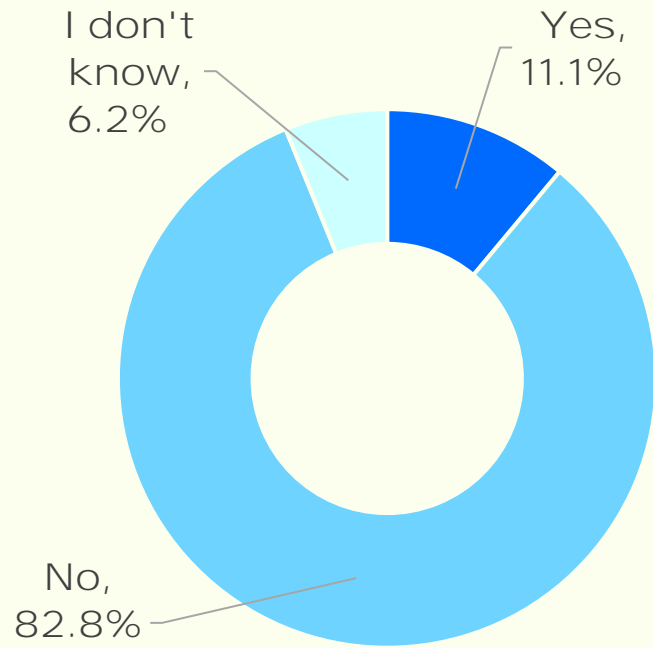
Podcasts as an influencing channel also gained some strength in 2023

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)



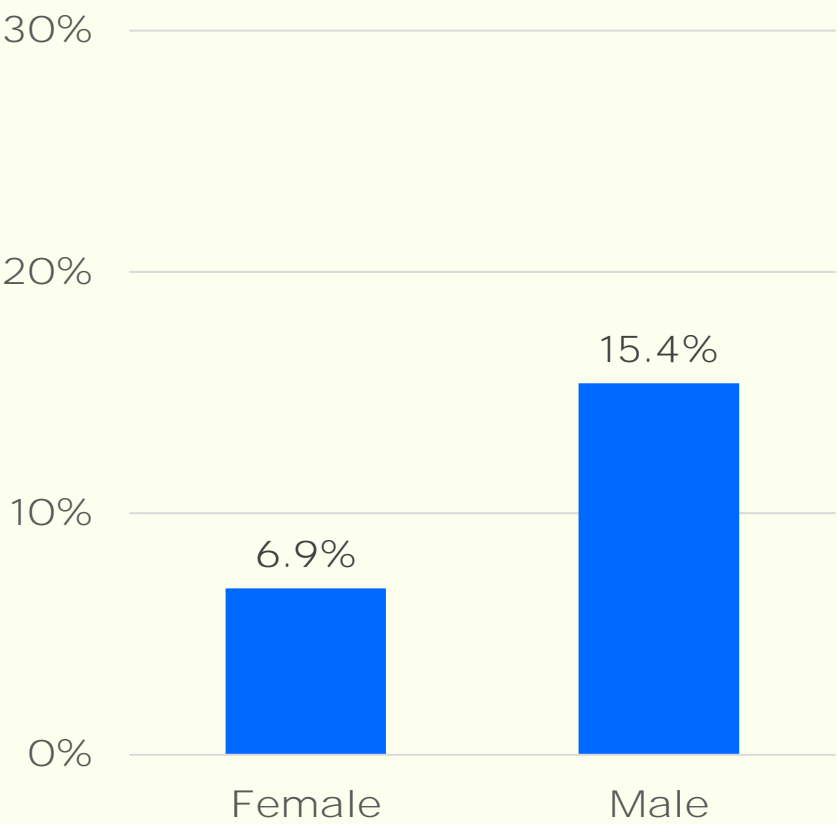
Use of artificial intelligence tools as a travel planning resource is at about 1-in-10 travelers.

Artificial Intelligence Tool Usage
(Travel planning - past 12 months)

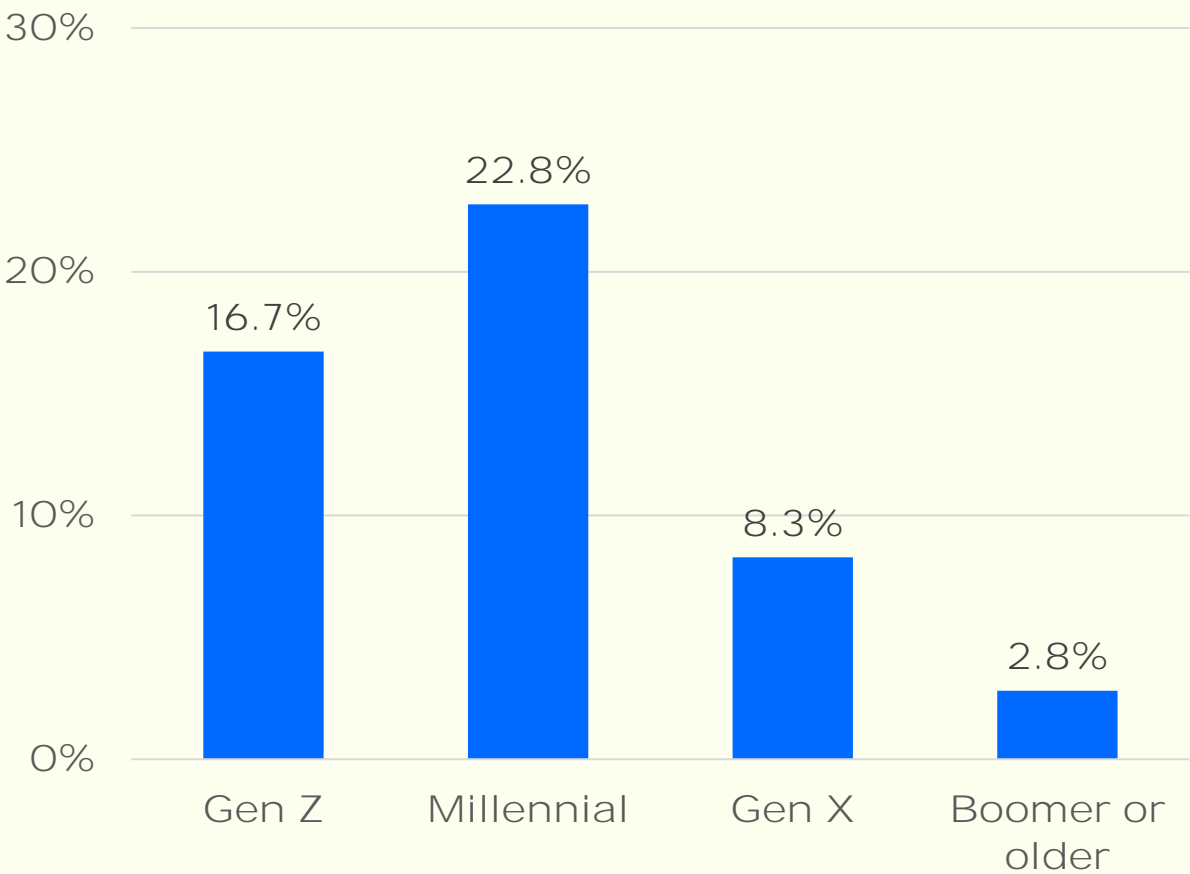


Use of AI tools in travel is being driven by Millennial men...

By Gender

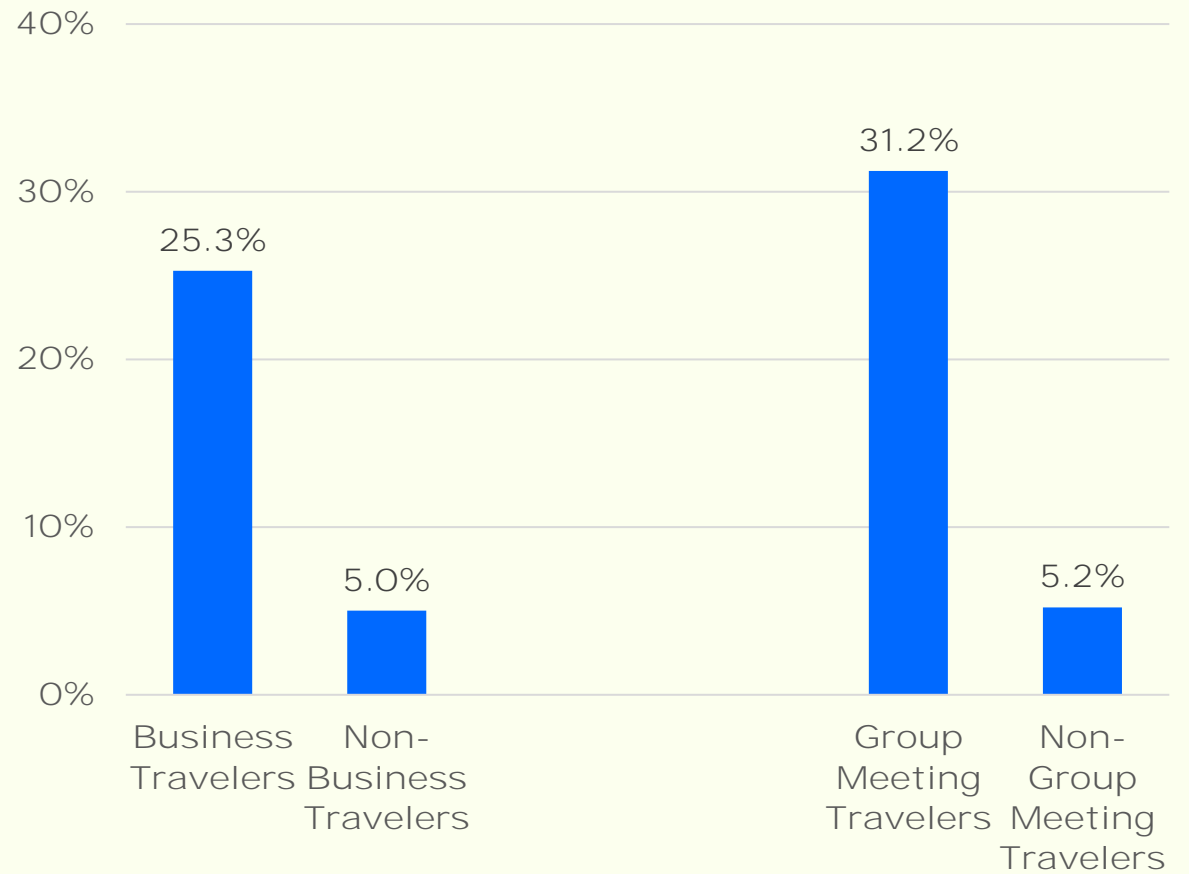
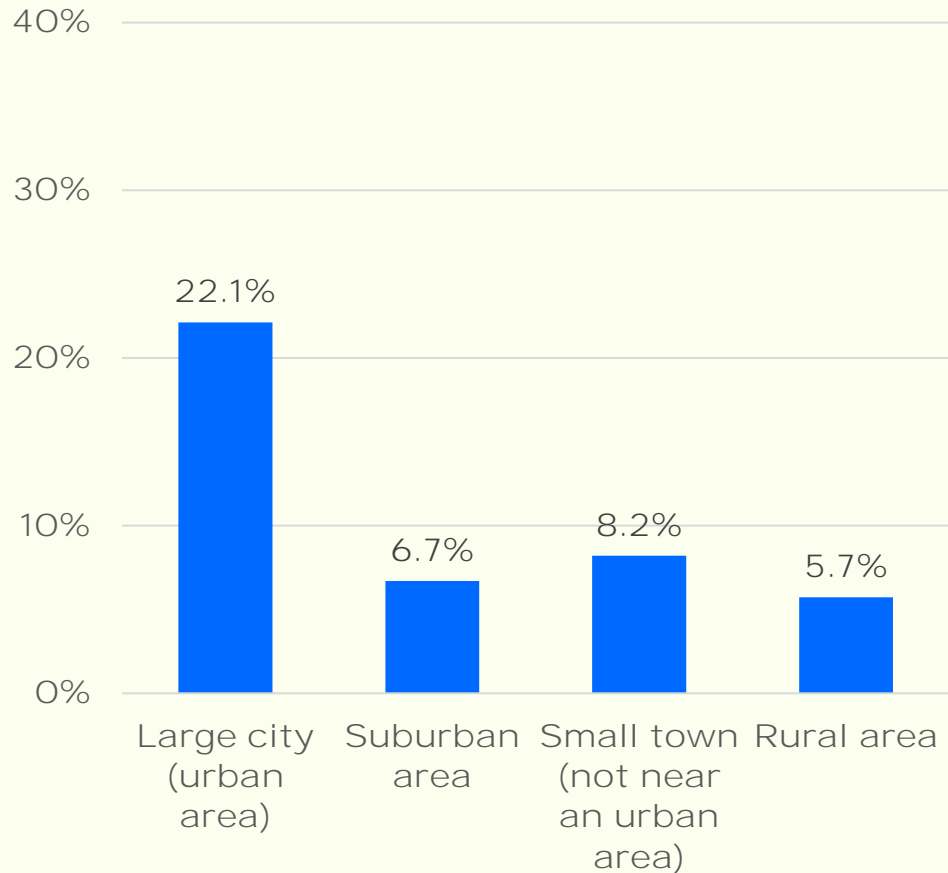


By Generation



...urbanites and business and group meetings travelers.

By Place of Residence



Business & Meetings Travel



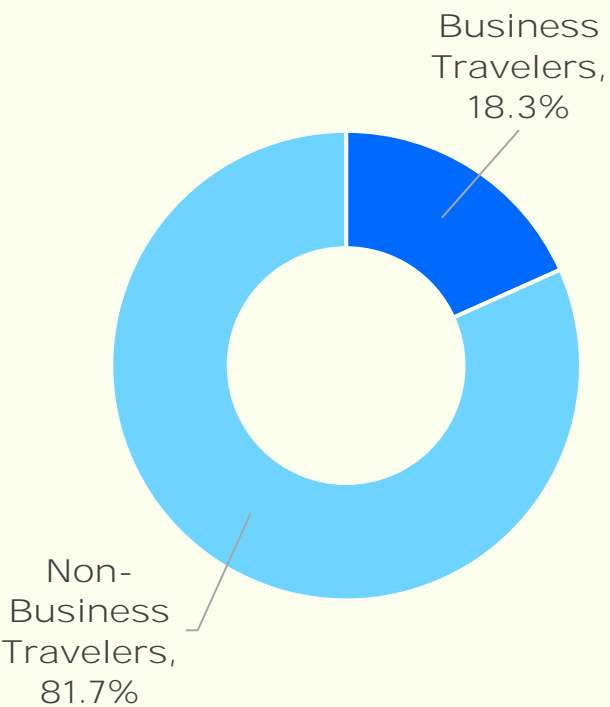
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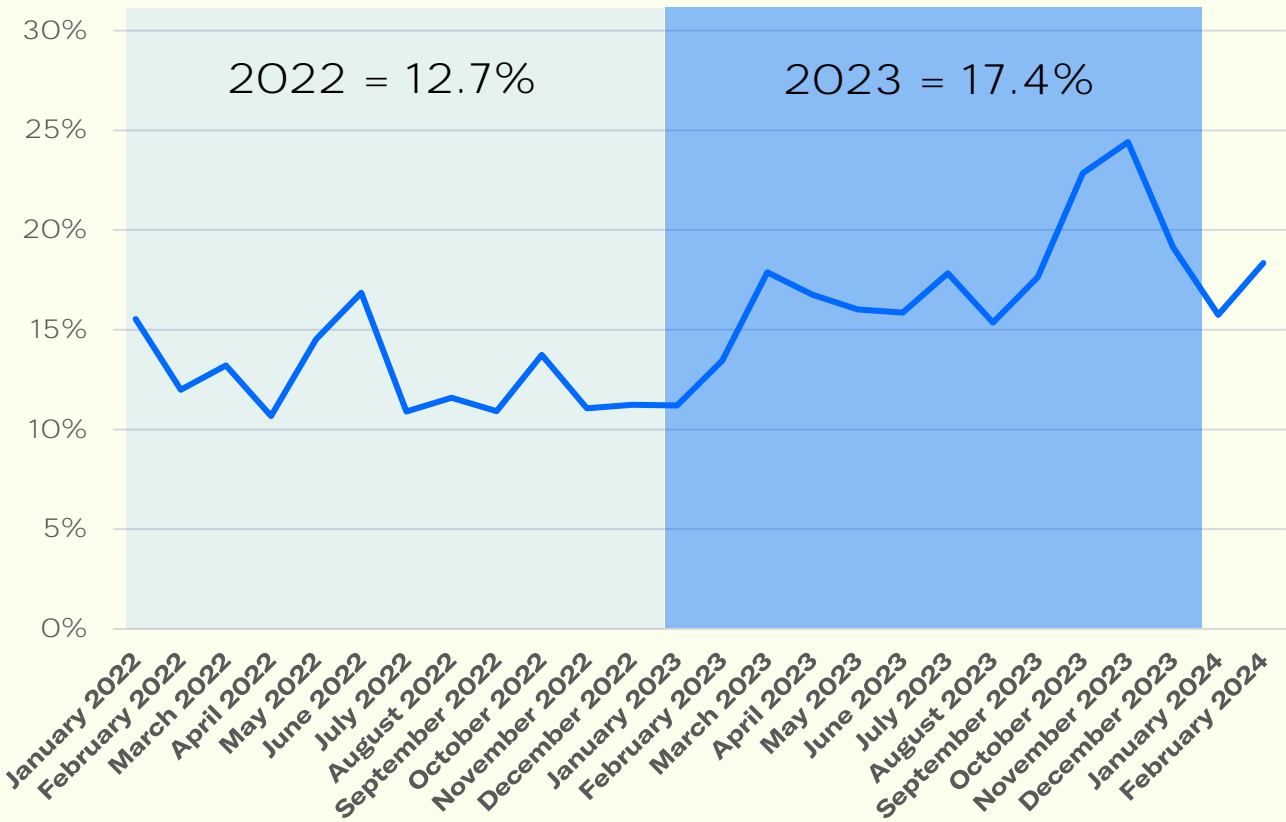
Overnight business travel grew last year.

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

Took 1 or More Overnight Business Trips



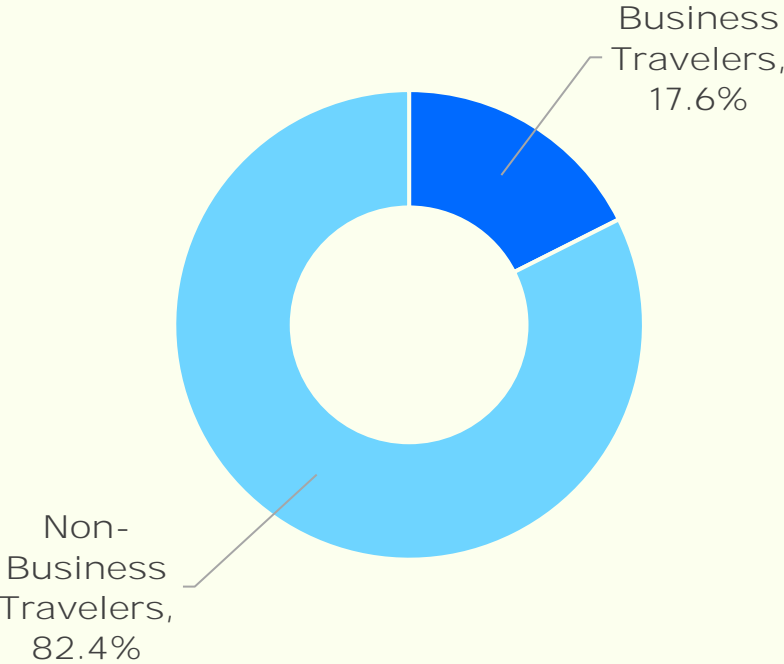
Percent of All Travelers Taking Business Trips



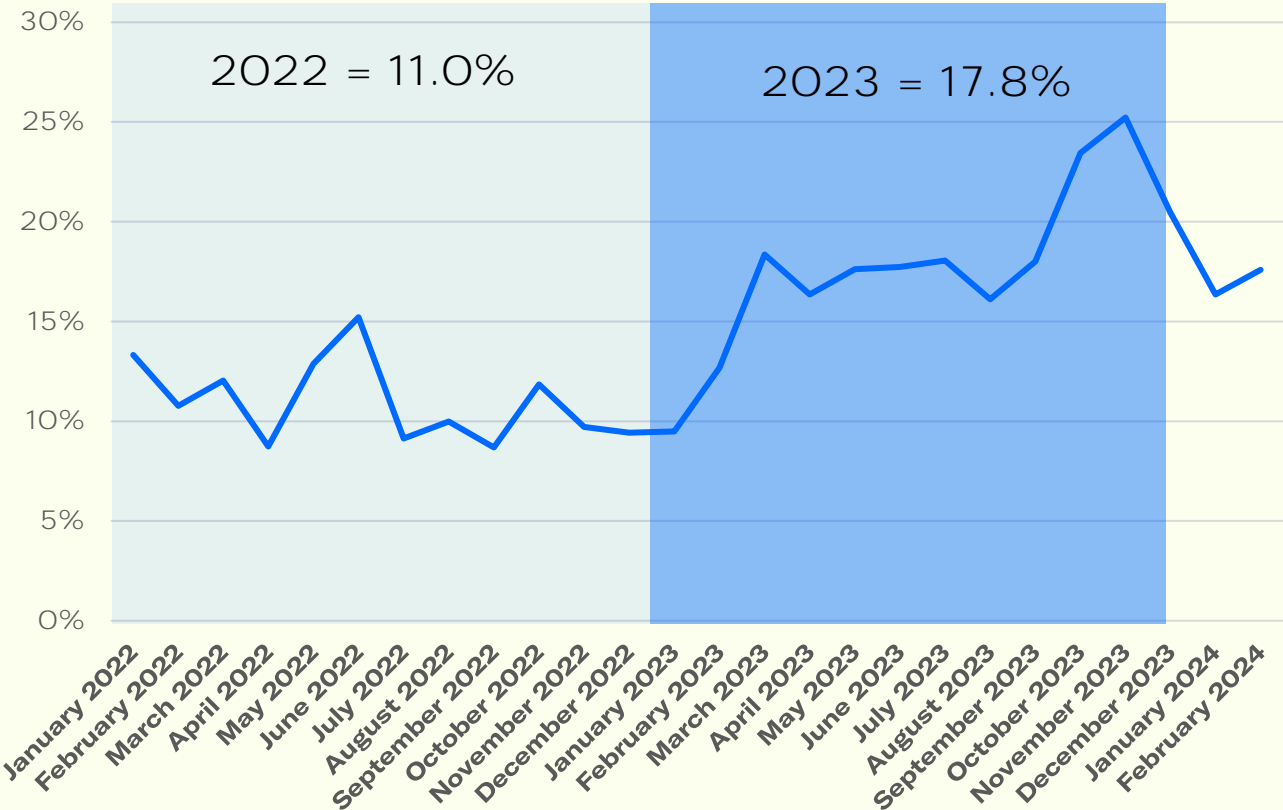
Day trip business travel followed a similar path.

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

1 or More Day Business Trips



Percent of All Travelers Taking Business Trips

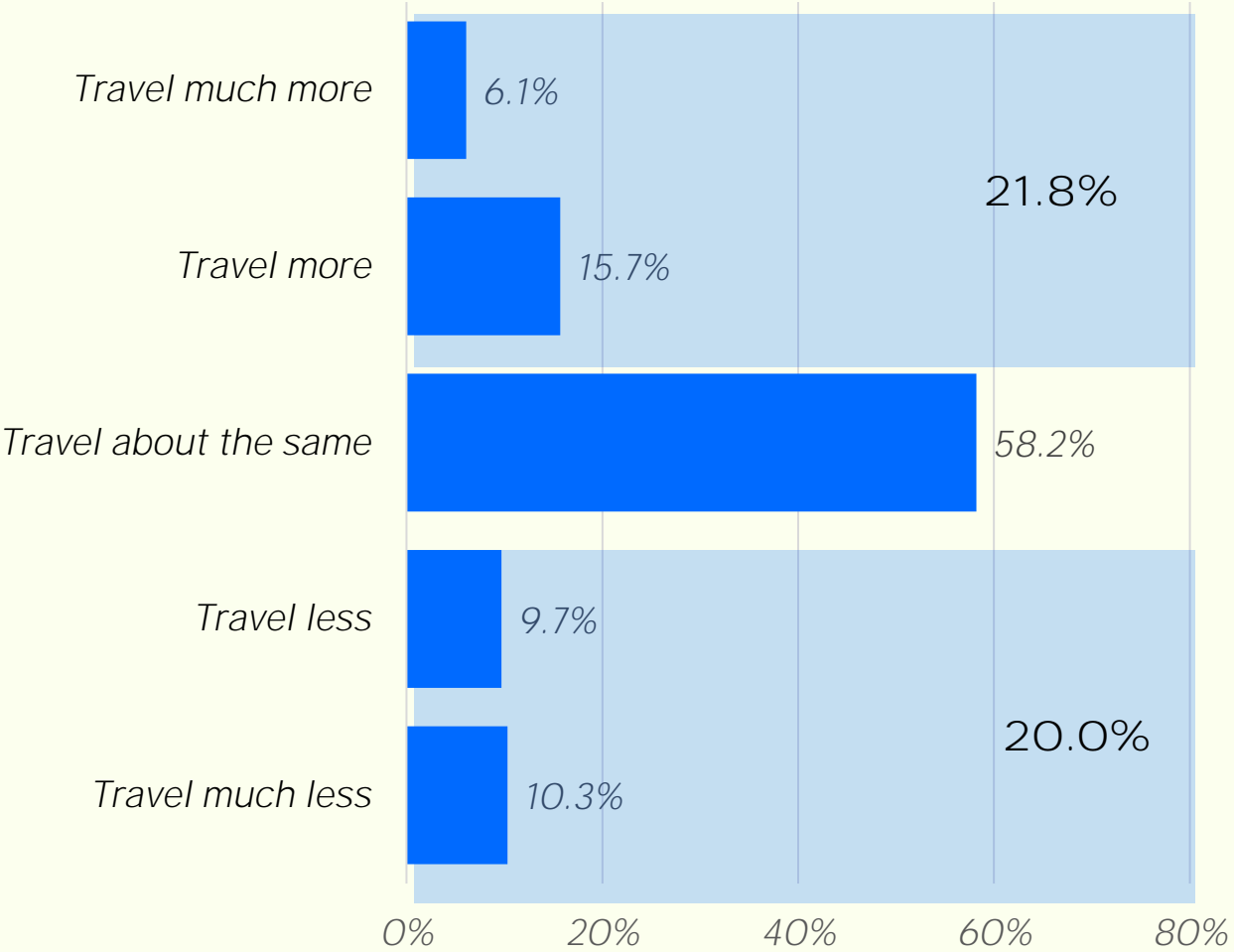


If expectations are realized, business travel will hold steady this year.

Question: In the NEXT 12 MONTHS, will people at your company/organization travel more or less for business purposes than the last 12 months? (Select one to complete the sentence)

The people in my company will most likely _____ for business.

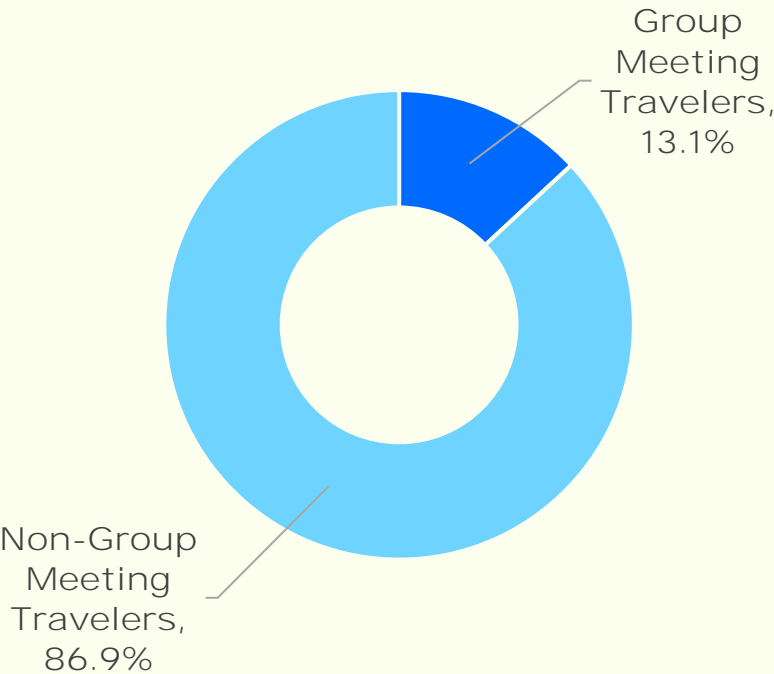
Base: All employed travelers. N = 3,105 travelers.



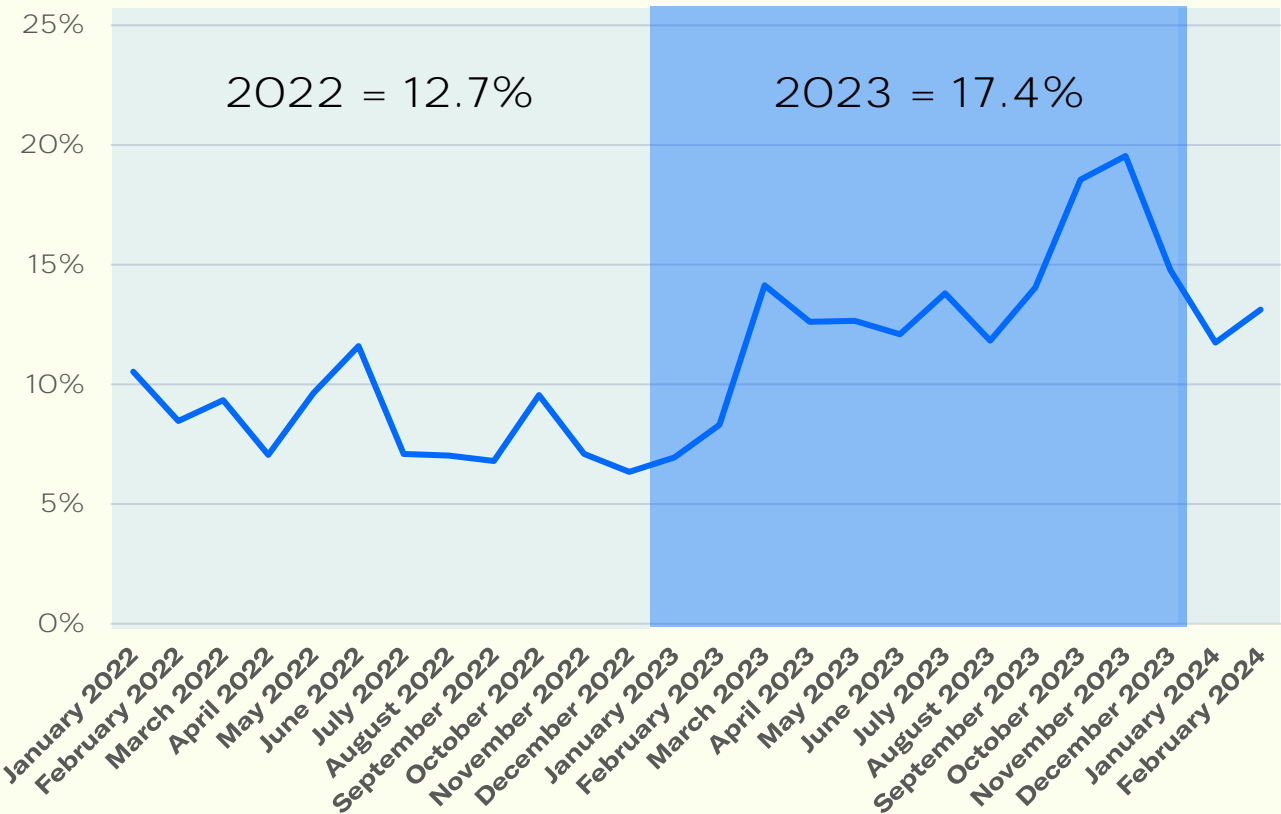
Overnight group meetings travel improved last year.

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

1 or More Overnight Group Meetings Trips



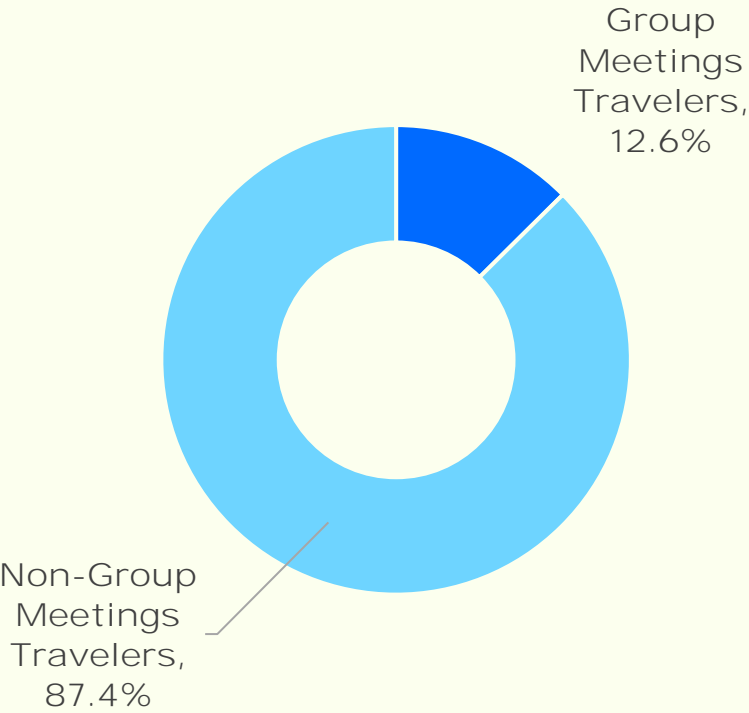
Percent of All Travelers Taking Overnight Group Meetings Trips



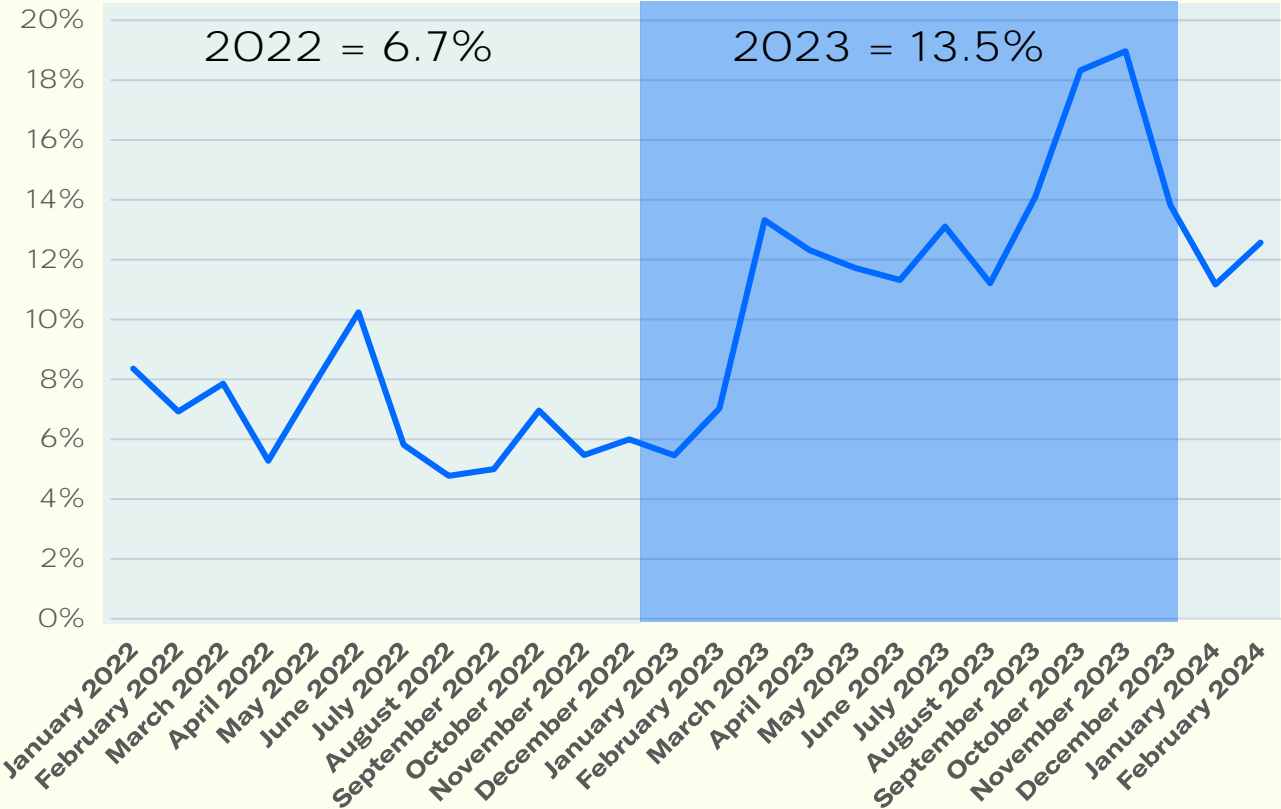
Day group meetings also followed a similar path.

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

1 or More Group Meetings Day Trips

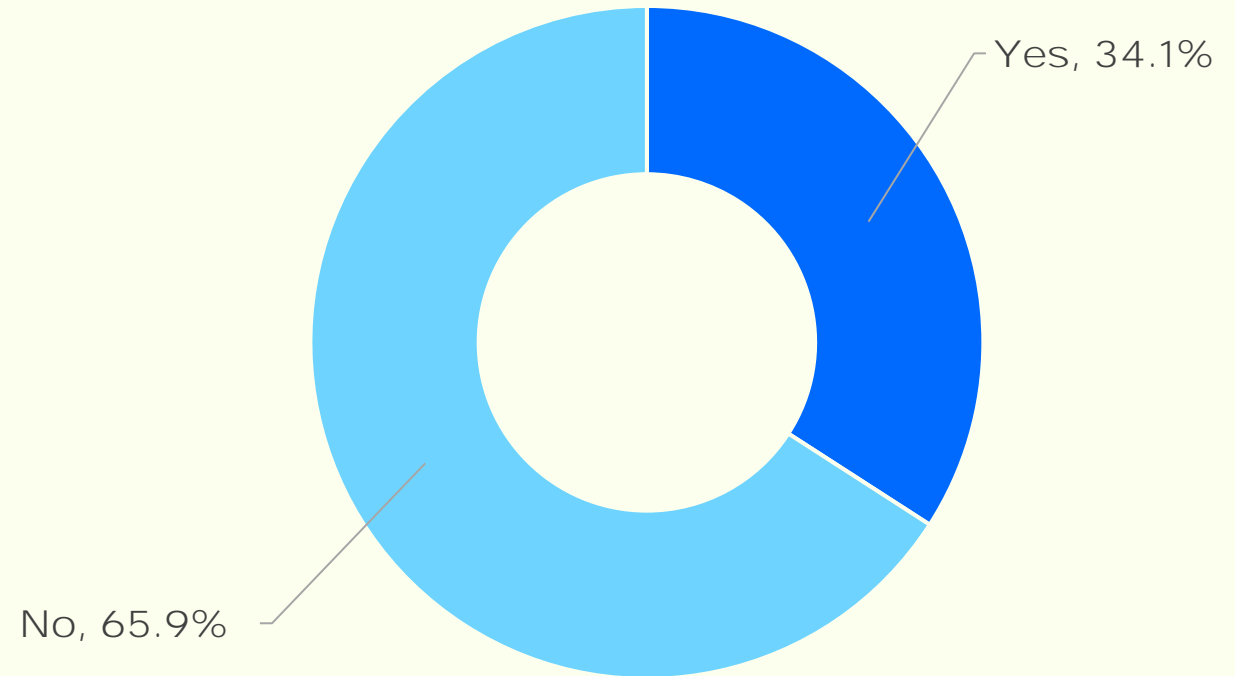


Percent of All Travelers Taking Group Meetings Day Trips



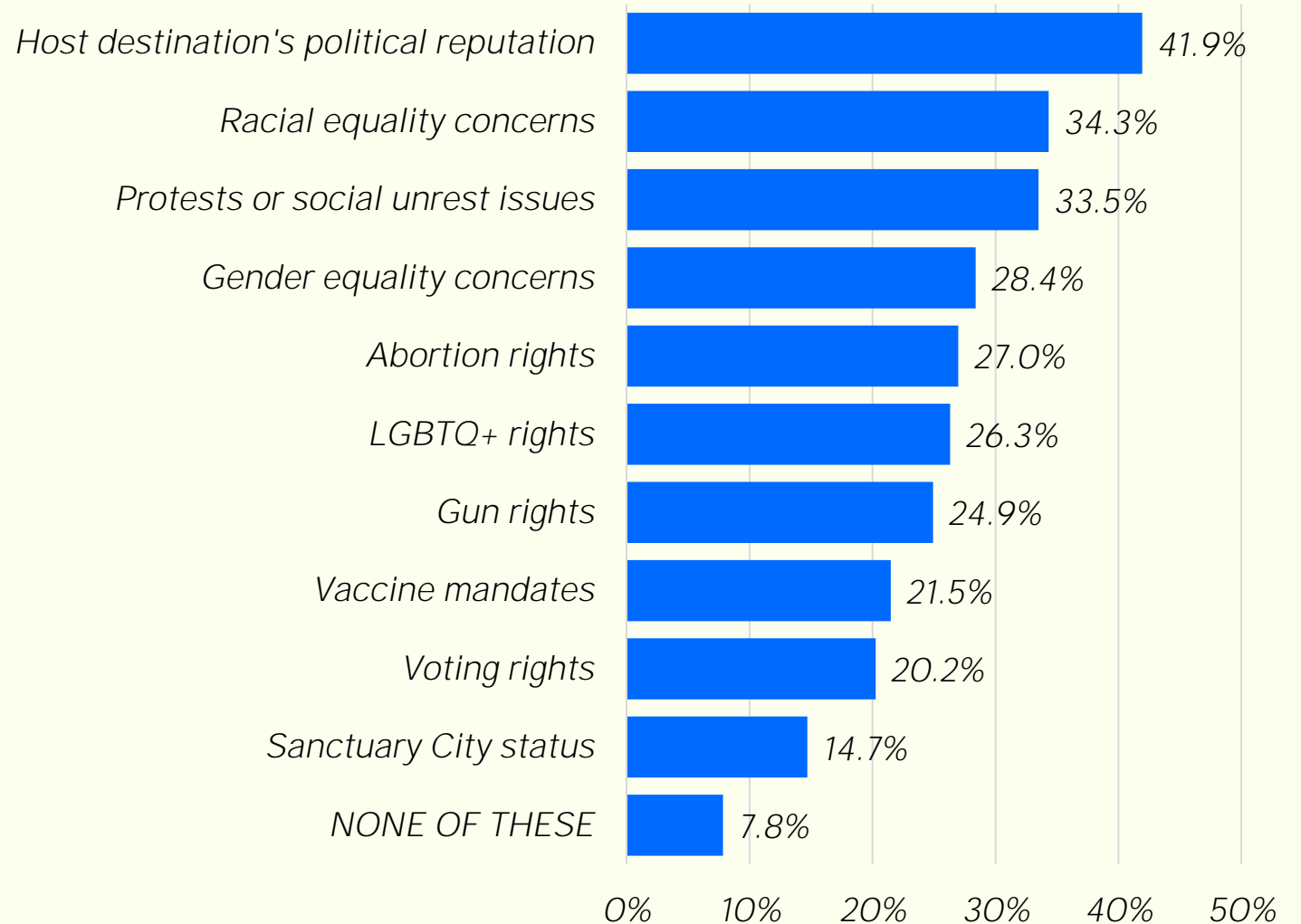
Political issues have caused about 1-in-3 group meetings travelers to reconsider a destination.

Question: Have political issues, such as state or local laws, caused you to reconsider traveling to a destination for a conference/convention?



A wide-variety of political issues arise that lead travelers to reconsider destinations.

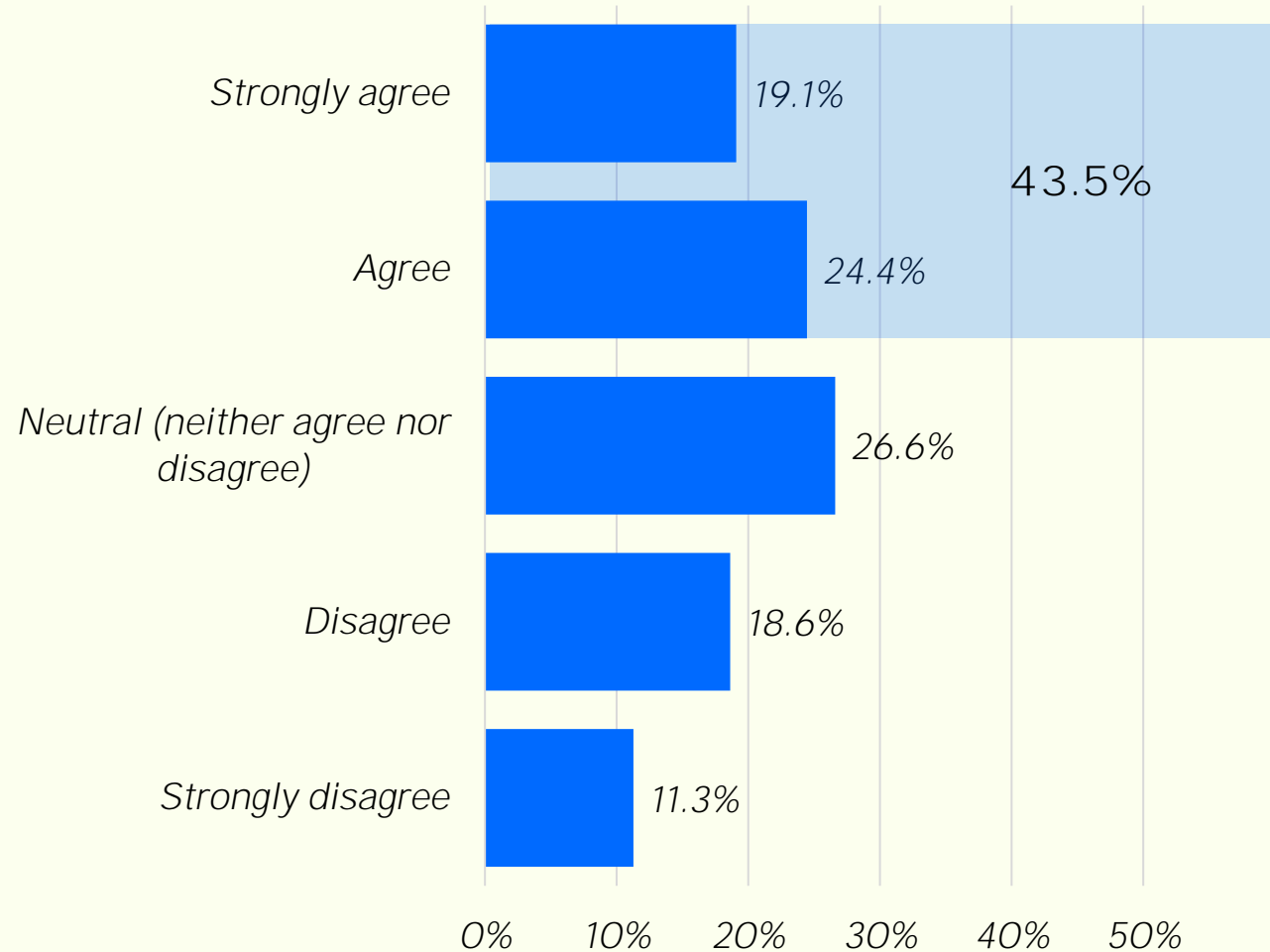
Question: Which of the following issues led you to reconsider traveling for a conference/convention?



At a higher-level, politics play an important role in where travelers are will to attend meetings.

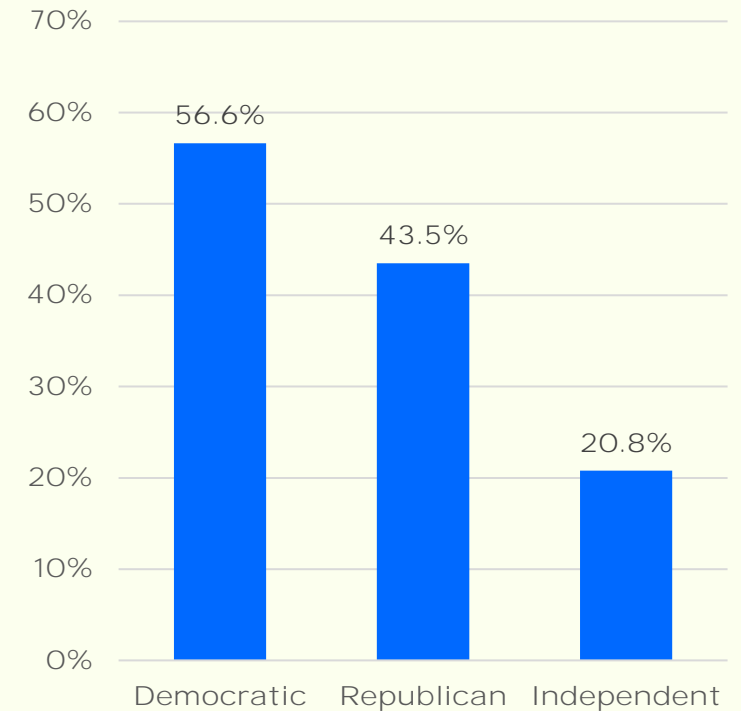
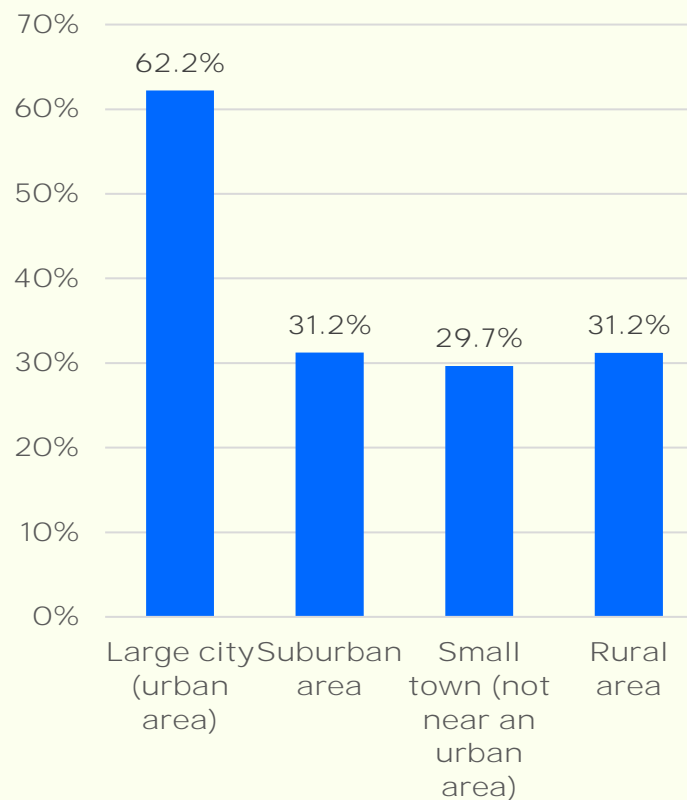
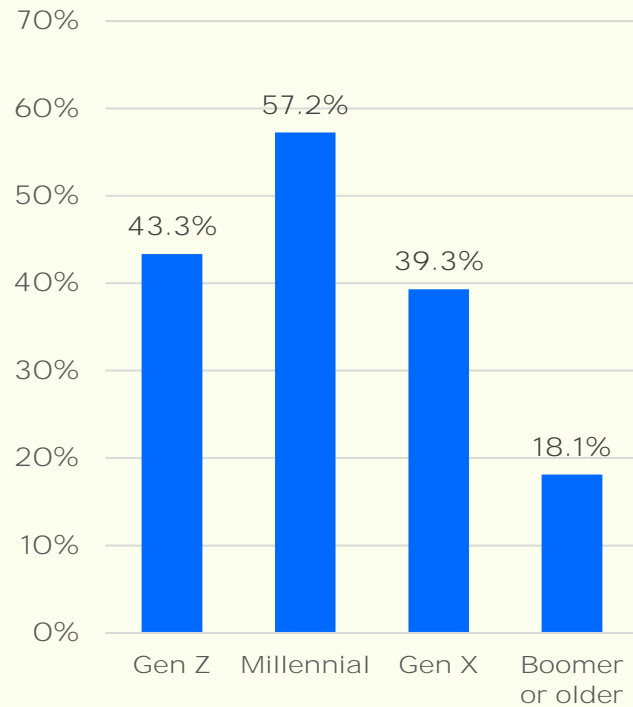
How much do you agree or disagree with the following statement:

***Question:** I will only travel to attend a conference/convention if the host destination aligns with my personal/political values.*



Millennials, urbanites and those identifying with a **political party** are most likely to say they'll only travel to certain meetings destinations due to politics.

Question: How much do you agree or disagree with the following statement: I will only travel to attend a conference/convention if the host destination aligns with my personal/political values.



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



Future Partners



Passion Profiles

Passion Profiles

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

Passion Profiles



Scan to learn more

The State of the International Traveler Study

Available
March 2024



Scan to learn more



Let's keep the conversation going



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*April Livestream
Registration*

Meeting Planner Discussion

*April Livestream
Registration*



- Top Upcoming Trends, including AI
- Serving GenZ attendees
- Best Ways to Get Noticed by Meeting Planners

Thank You!

*April Livestream
Registration*

