Destination Decisions

Powered by The State of the American Traveler

March 5, 2024

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Research, slides and other resources will be available at:

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Today

1. Current Traveler Sentiment
2. Destination Decisions
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    - Signature Events
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4. Q&A

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March 2024

Destination Decisions 2024

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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

Overview & Methodology

- Monthly tracking study of a demographically and geographically representative group of adult American travelers
- 4,000+ unique completed surveys collected each month
- Multifaceted survey questionnaire addressing diverse set of traveler opinions, preferences, awareness, brand usage and behaviors
- Topline findings reflect data collected January 17th – 23rd and have a confidence interval of +/- 1.6%.

Current Travel Sentiment

Elements Impacting Destination Decisions

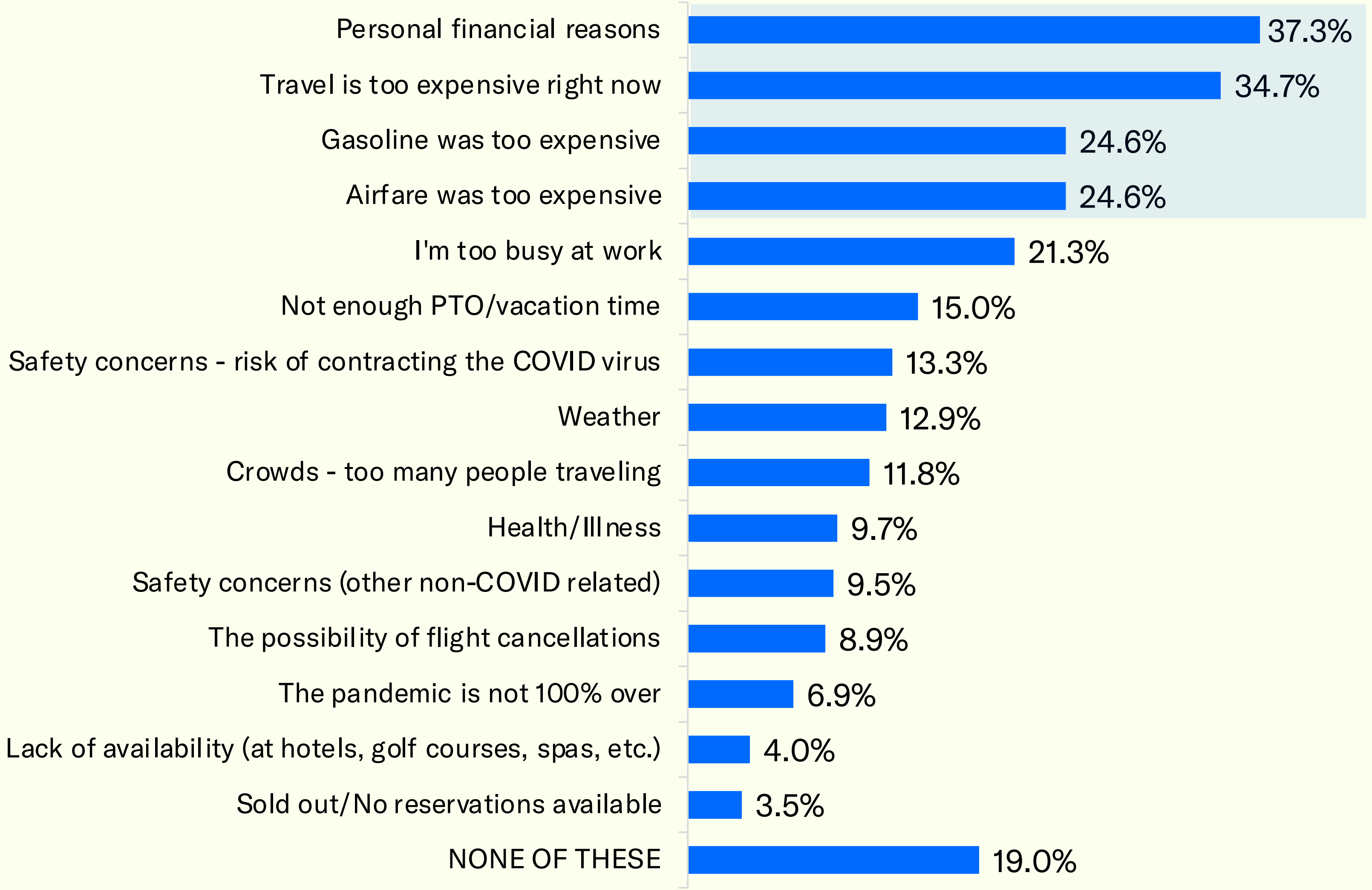
Signature Events

Current Travel Sentiment

Travelers’ personal financial sentiment weakened slightly at the start of the new year

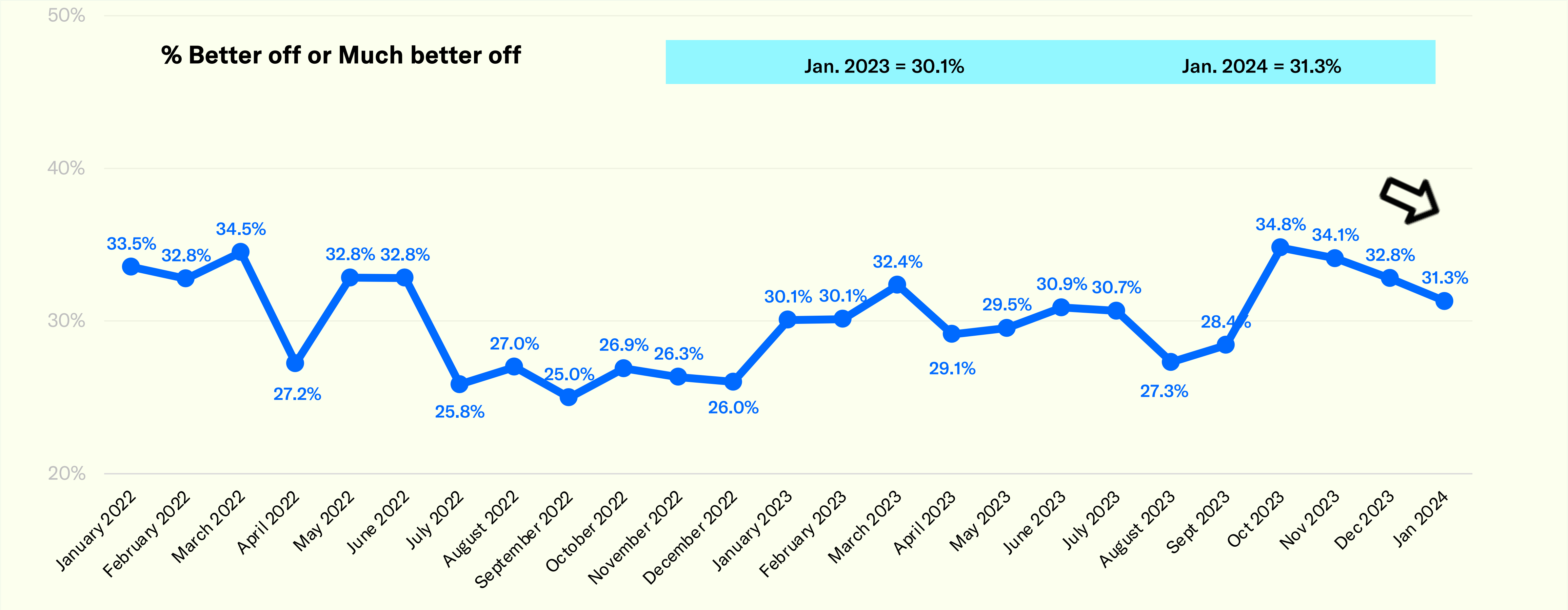
Perceptions of high expense remain the top impediment to travel

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)



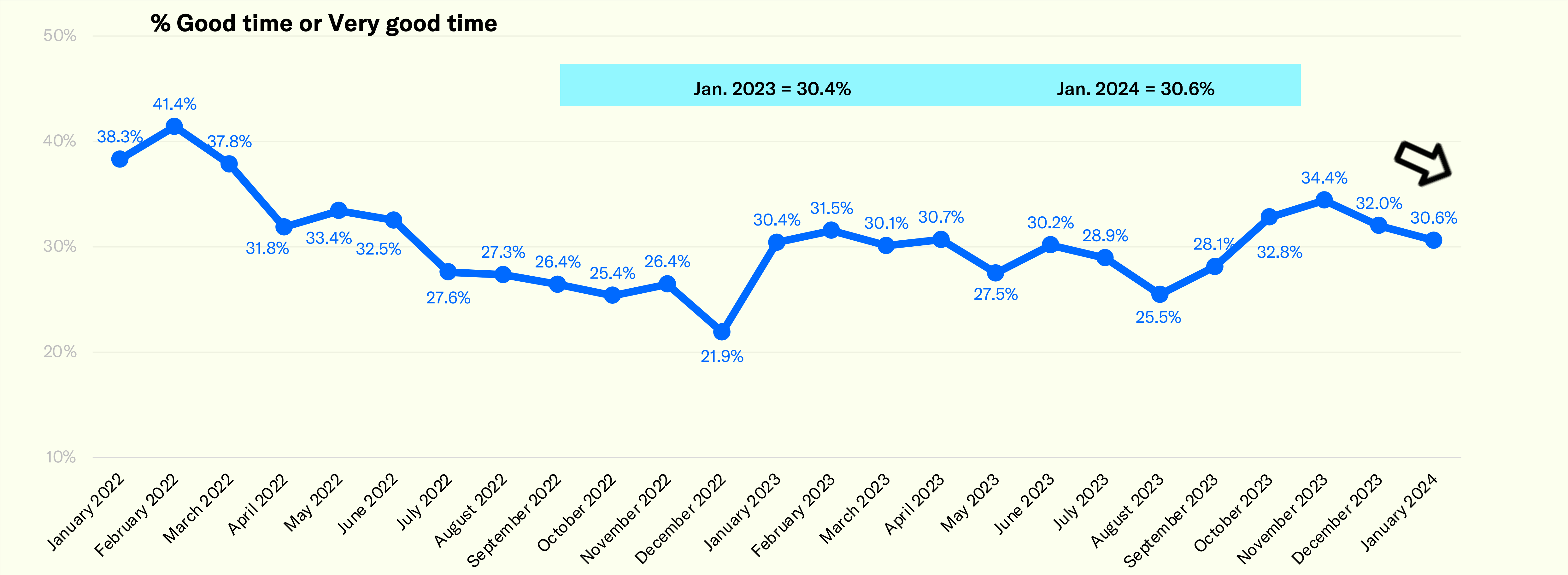
Current financial sentiment has weakened since last fall.

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



The belief that the present is a good time to spend on travel weakened over the last few months

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?



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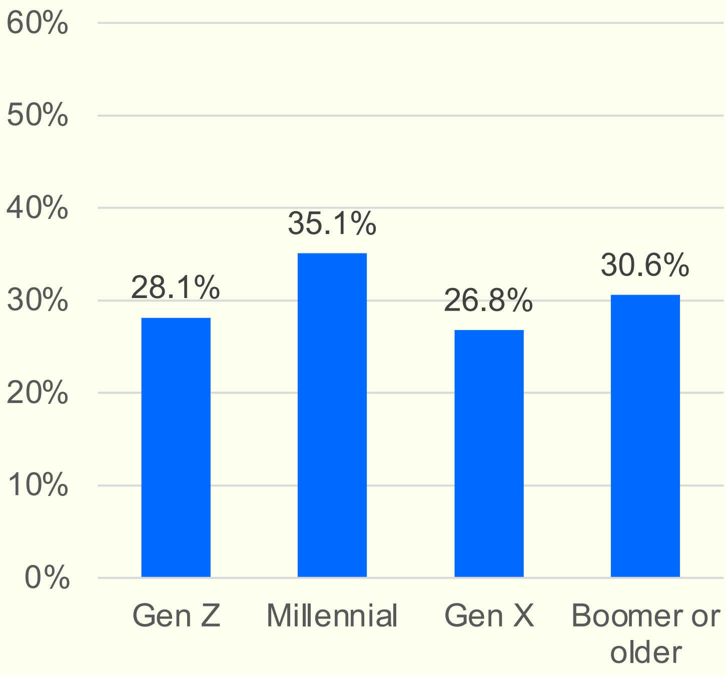
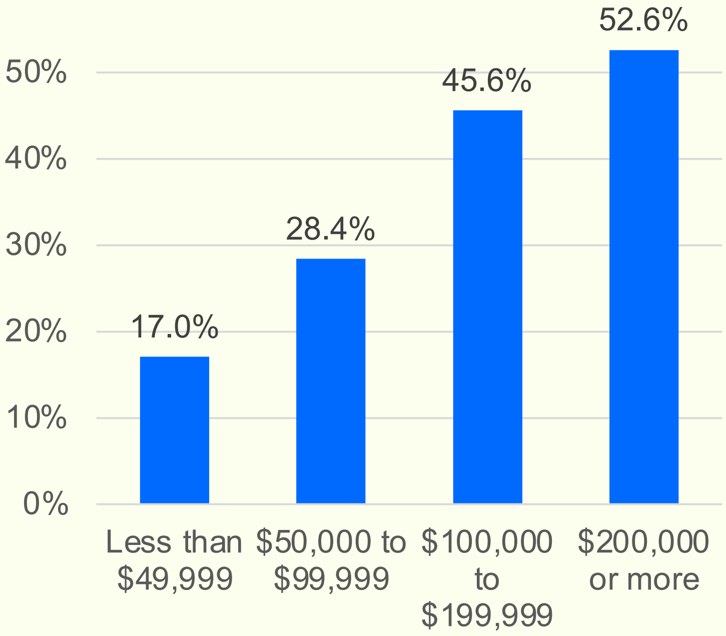
A deeper look: Who is feeling good about spending on travel right now?

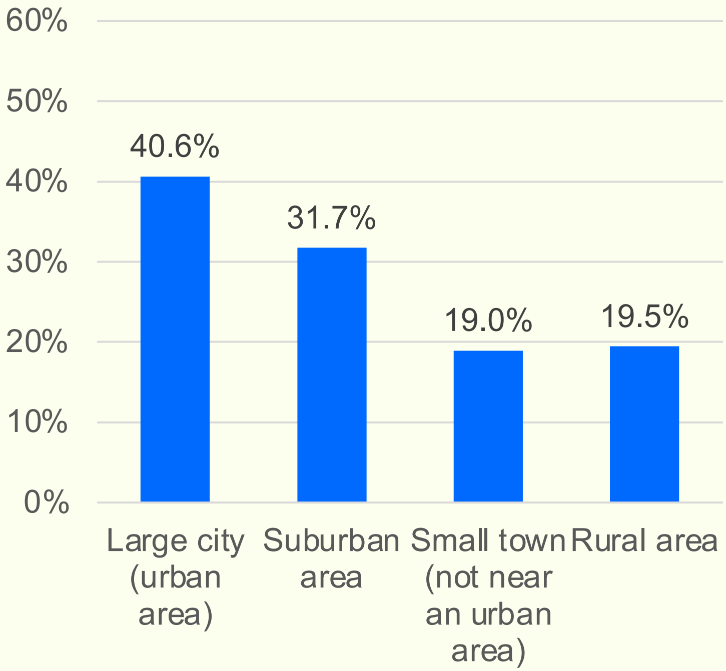
Generation



Annual Household Income



Place of Residence



Statement:

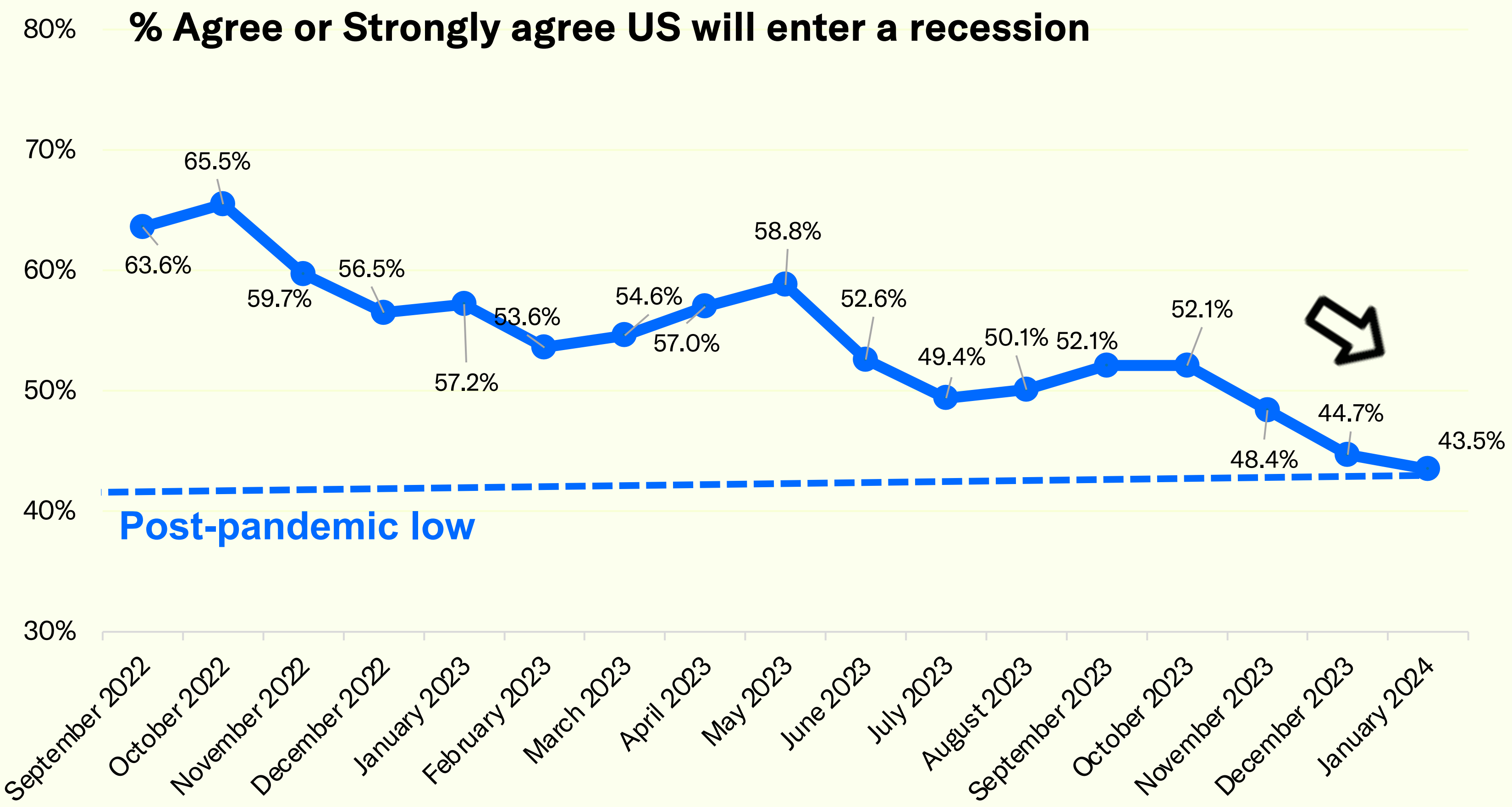
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

Recession concerns continue to subside

Most American travelers no longer expect a pending recession.

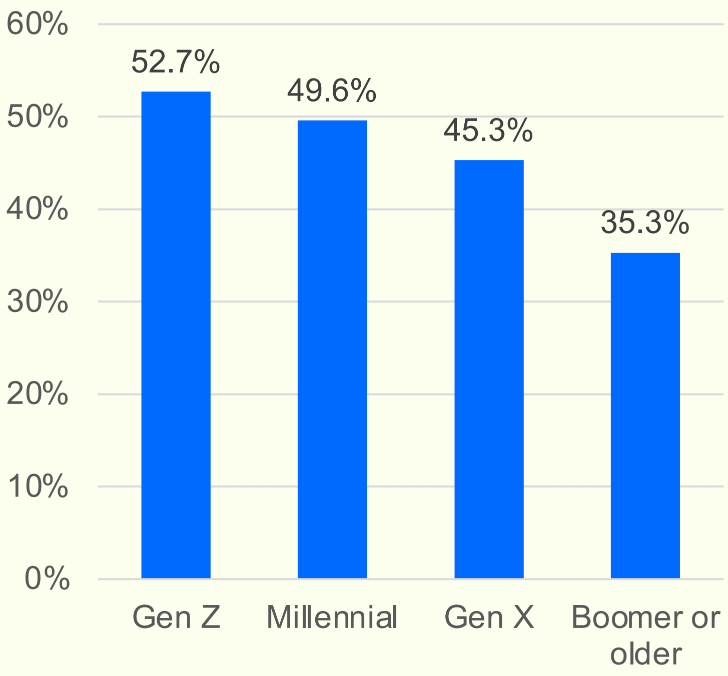
Statement:

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

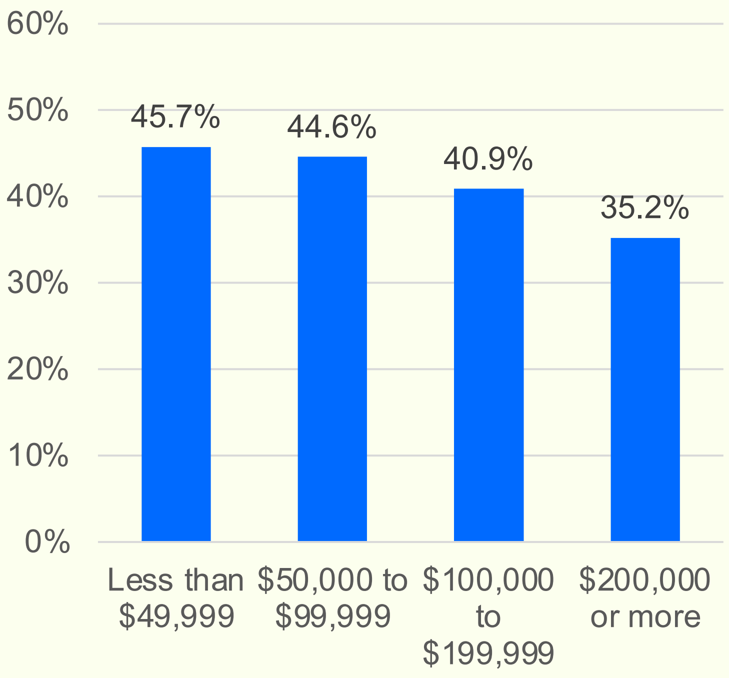


A Complex Landscape: Who Expects Recession

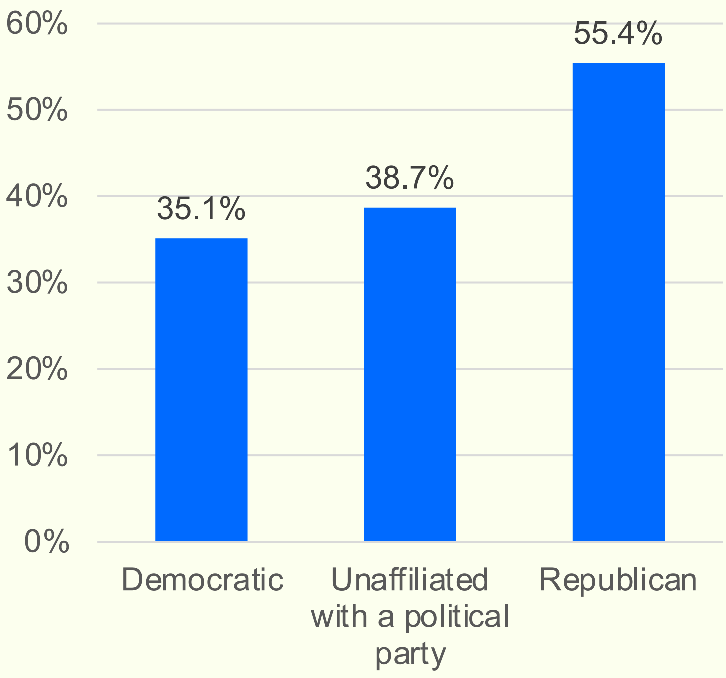
Generation



Annual Household Income



Political Affiliation



Statement:

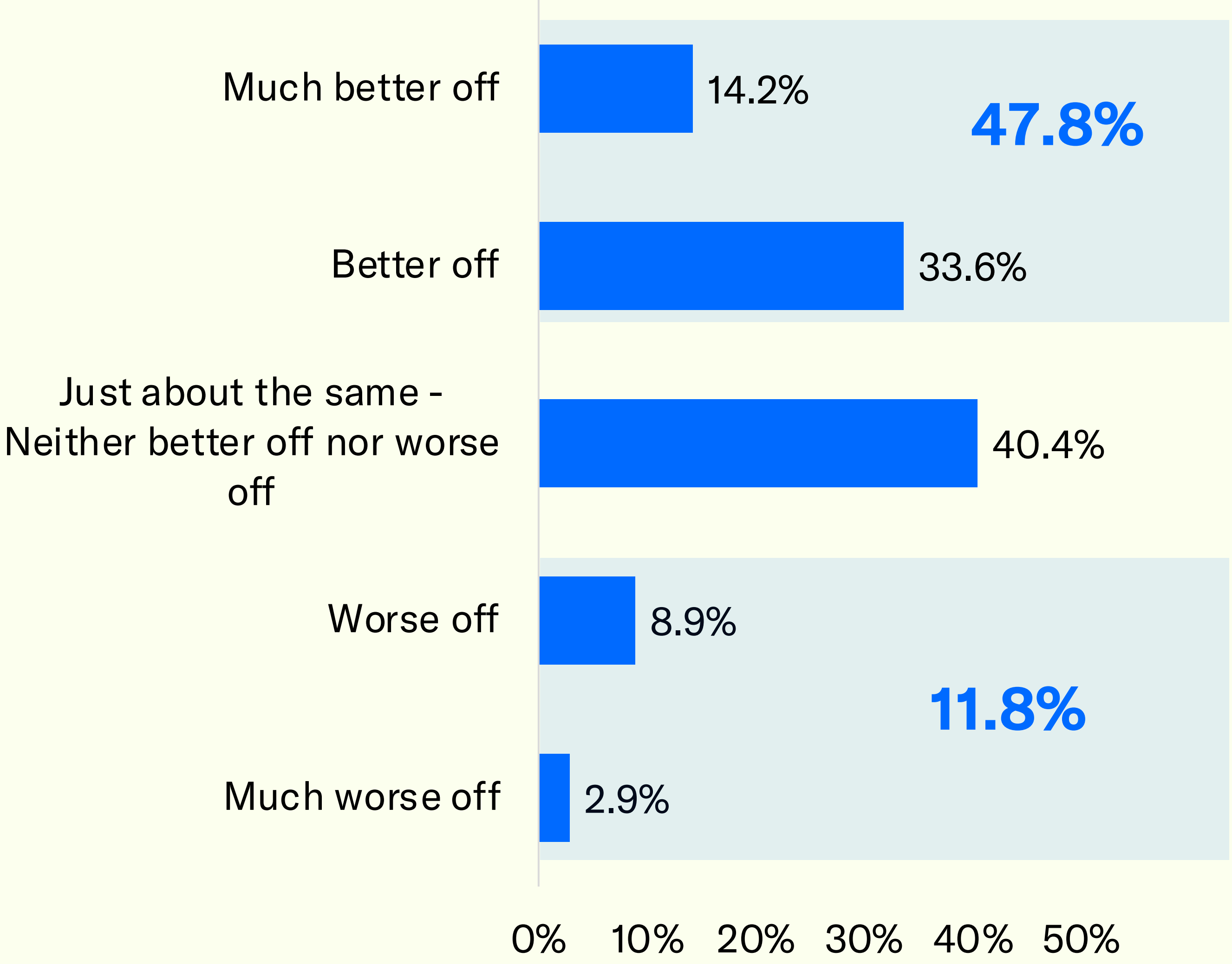
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

Travelers are still largely optimistic about their financial future—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?



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Travel budgets have increased

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):

Mean Maximum Expected Spending

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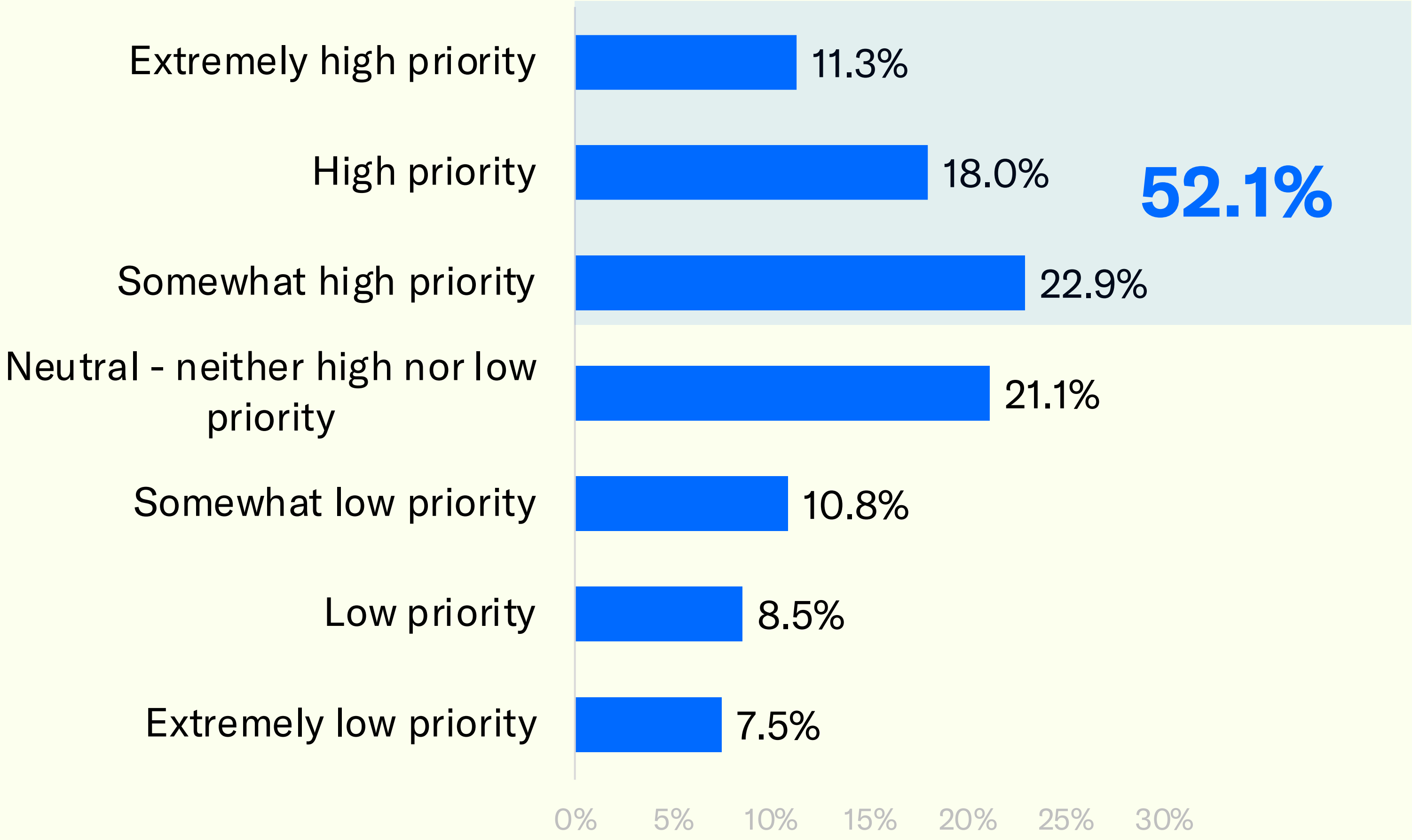
52% intend to make leisure travel a spending priority in the next three months.

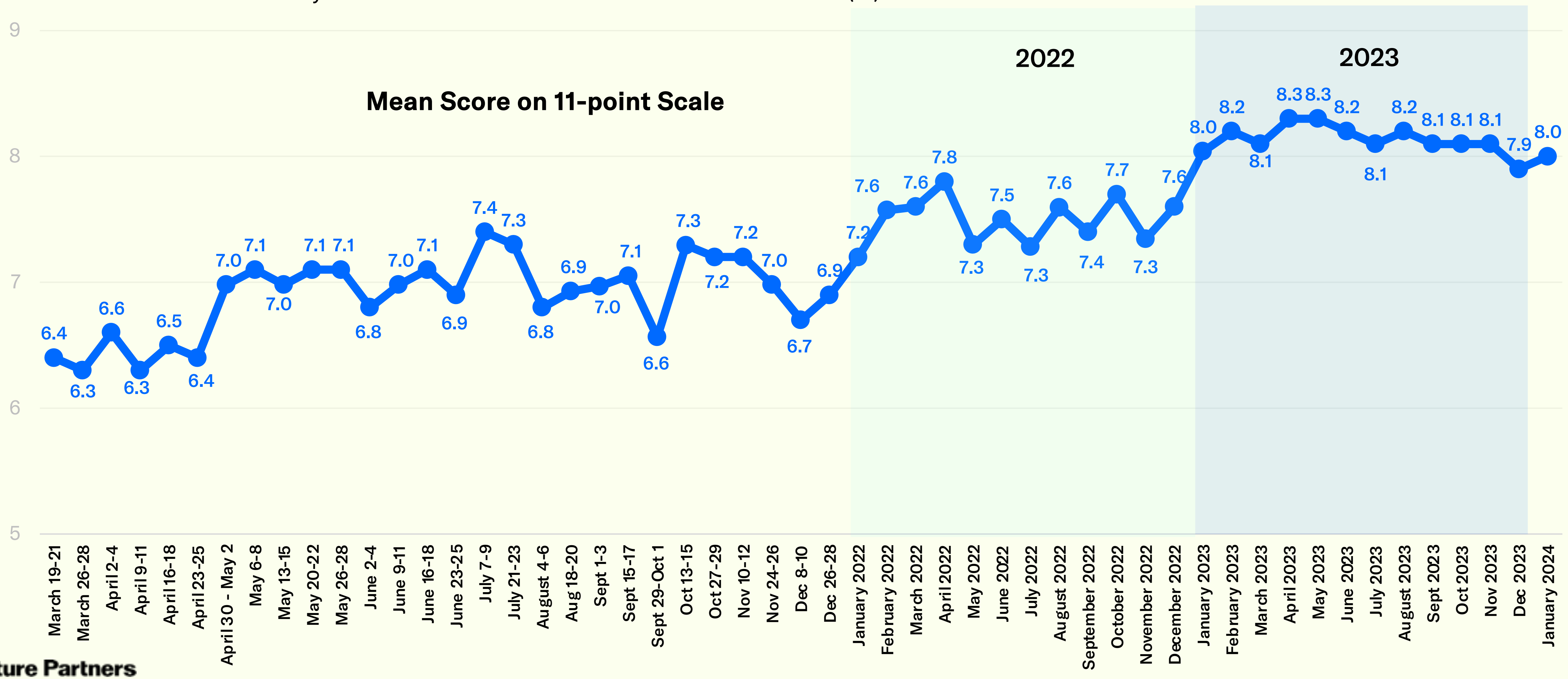
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n)



Excitement to travel remains at near record-high levels

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



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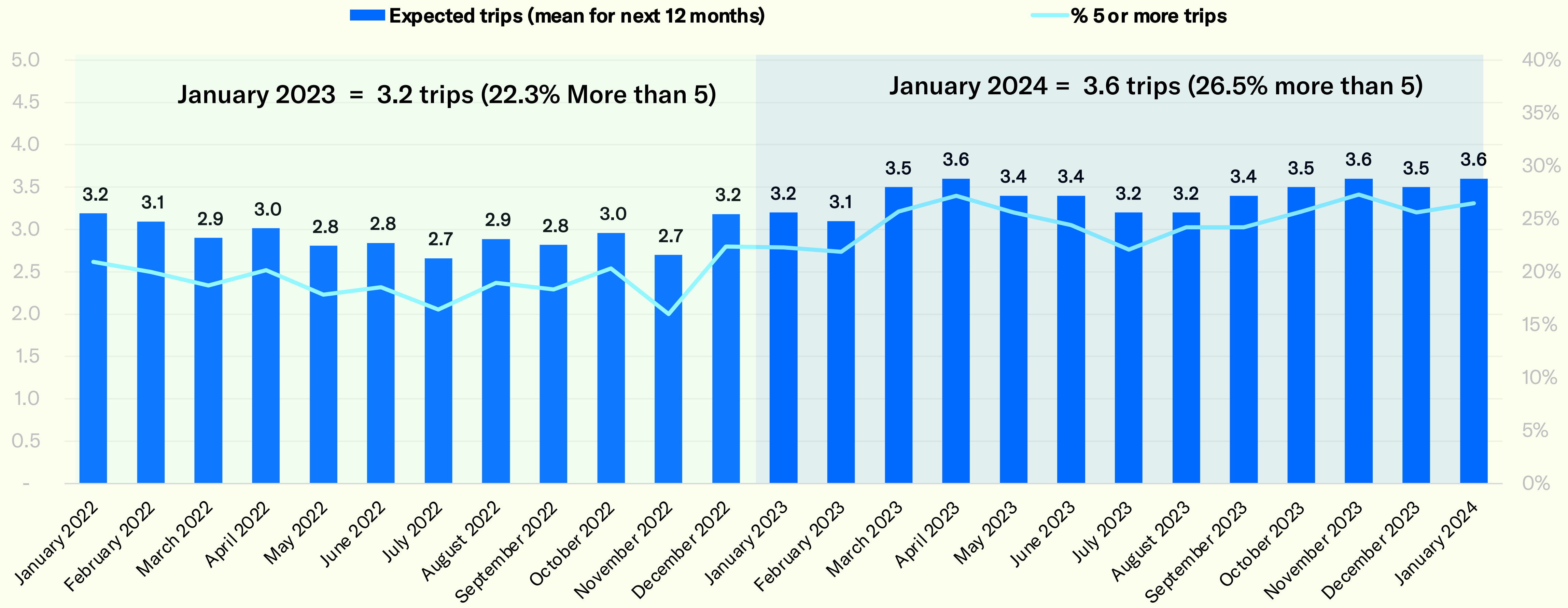
Expectations for future travel volume remain robust

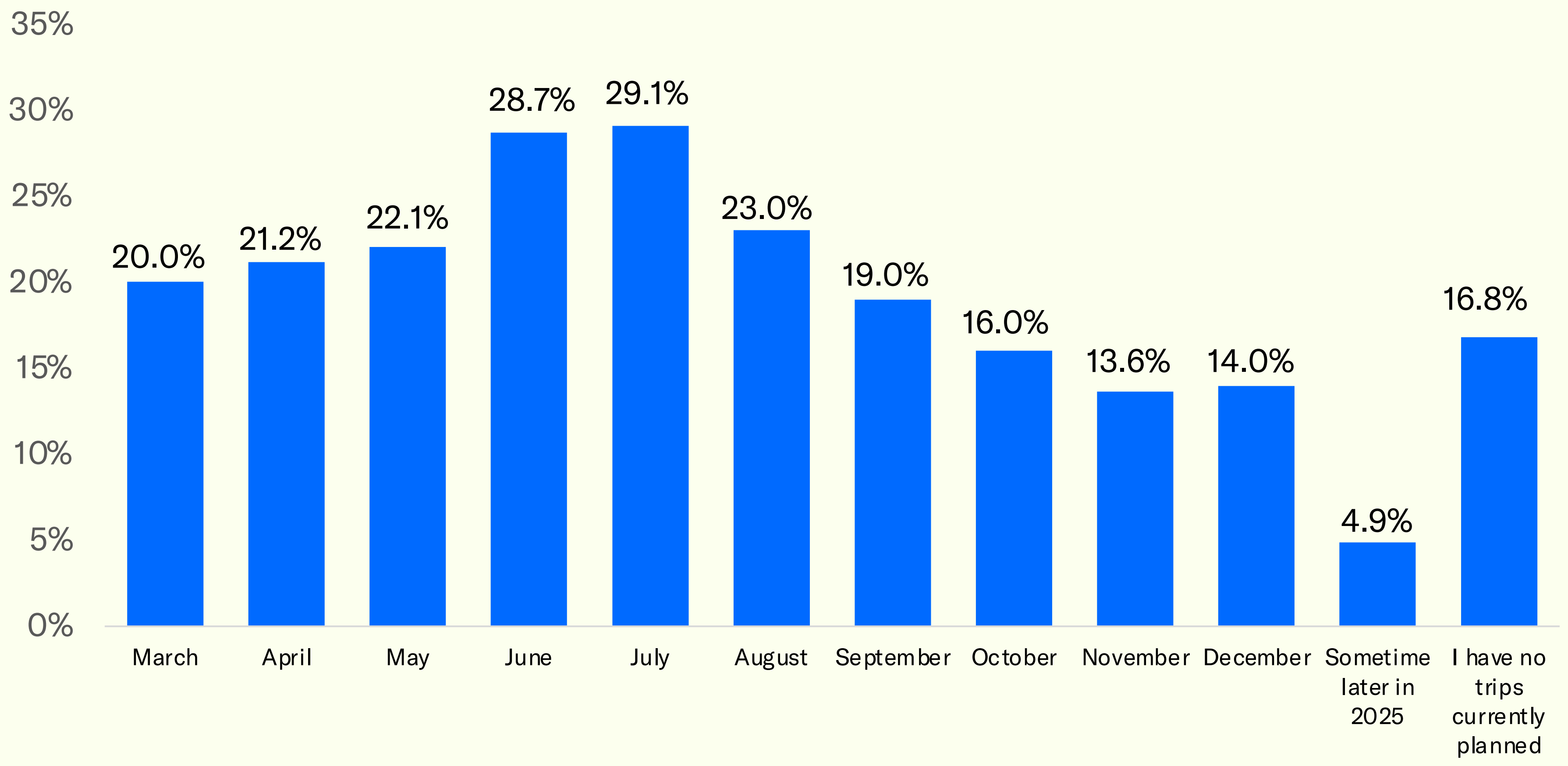
Travel expectations are well above 2023 levels.

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?



Over 87% have trips already planned

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



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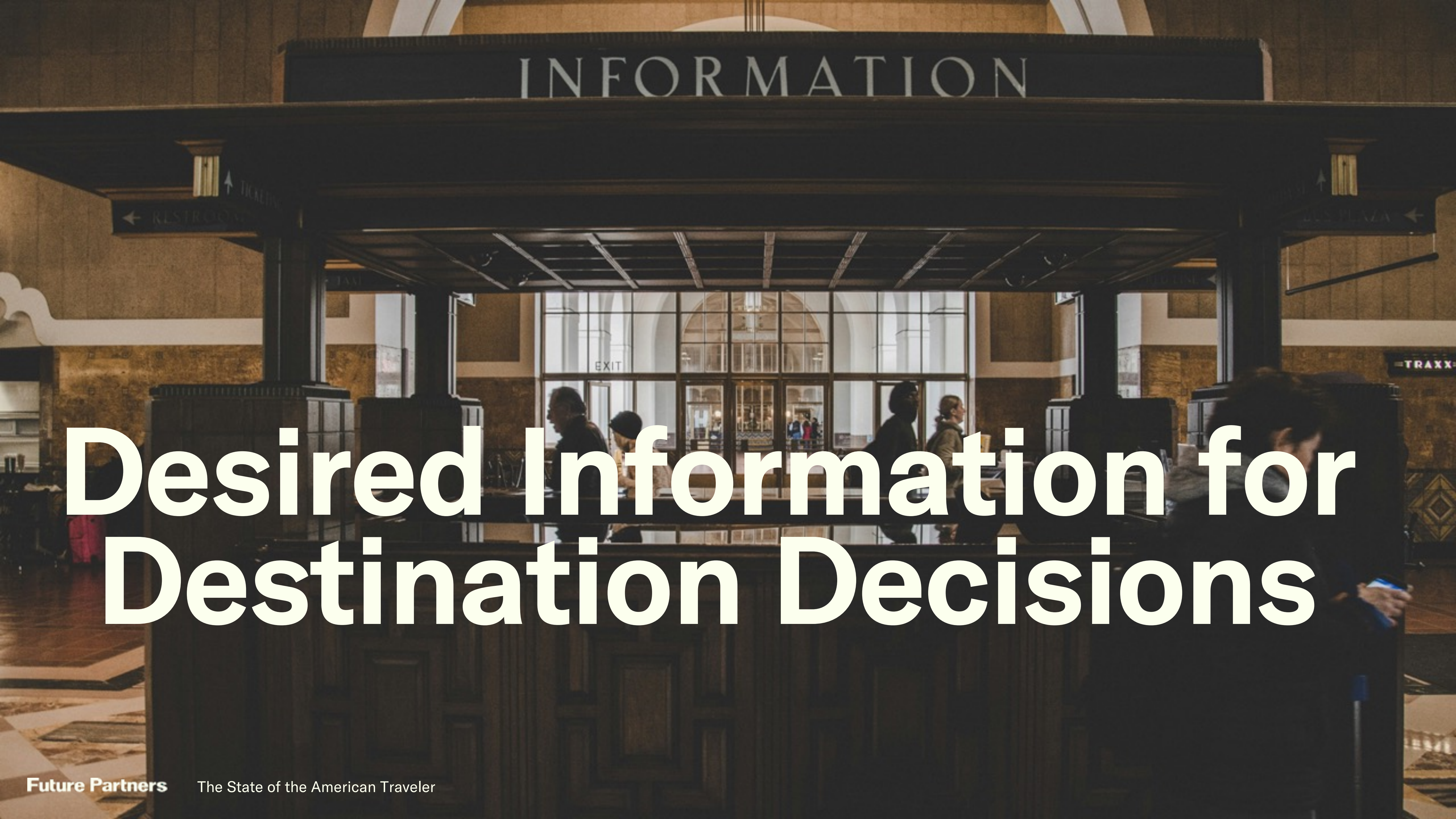
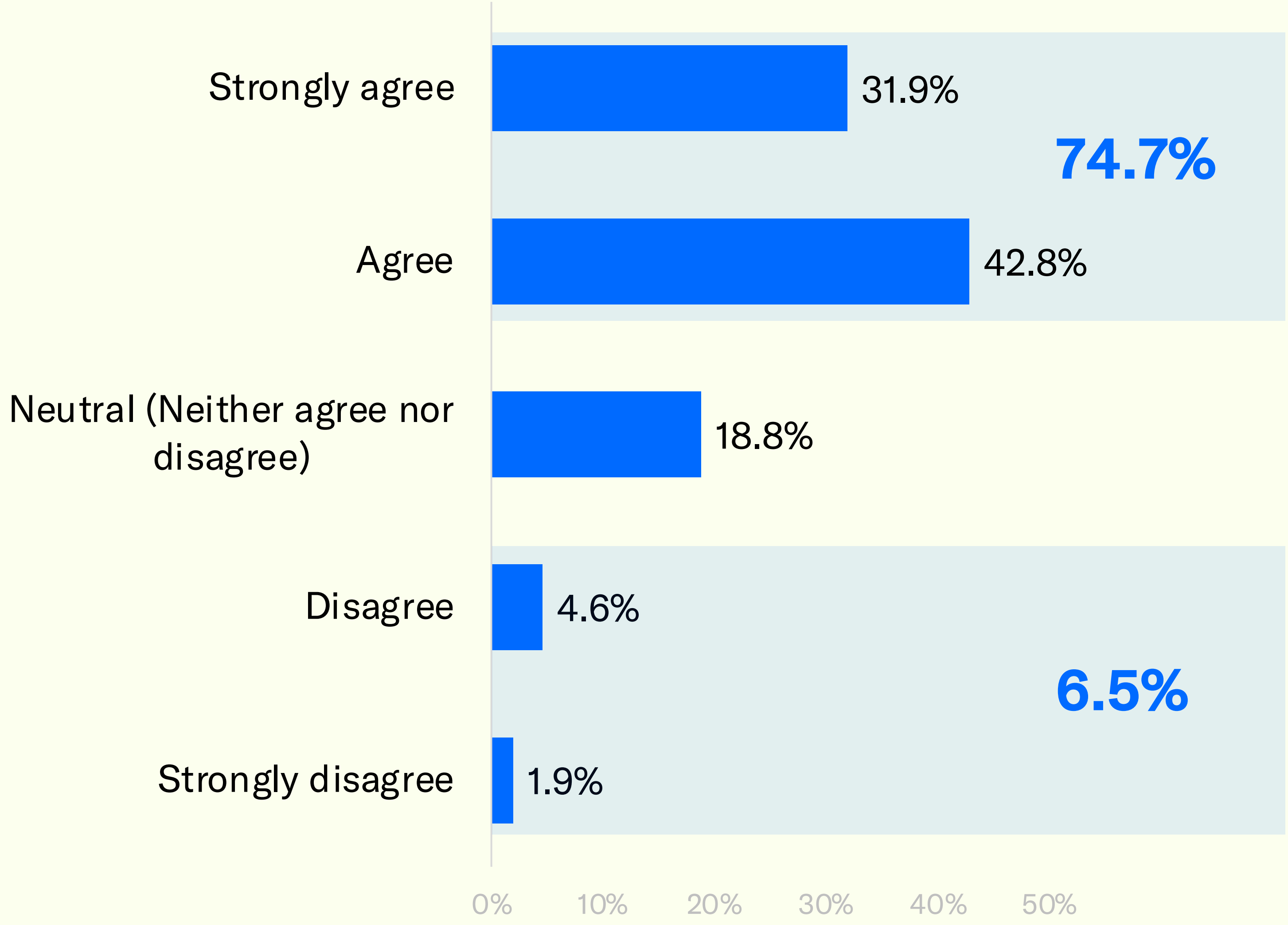
(Base: All respondents, 4,397 completed surveys. Data collected January 17-23, 2024.)



Desired Information for Destination Decisions

Understanding the affordability of a destination is a key component to travelers' destination decisions.

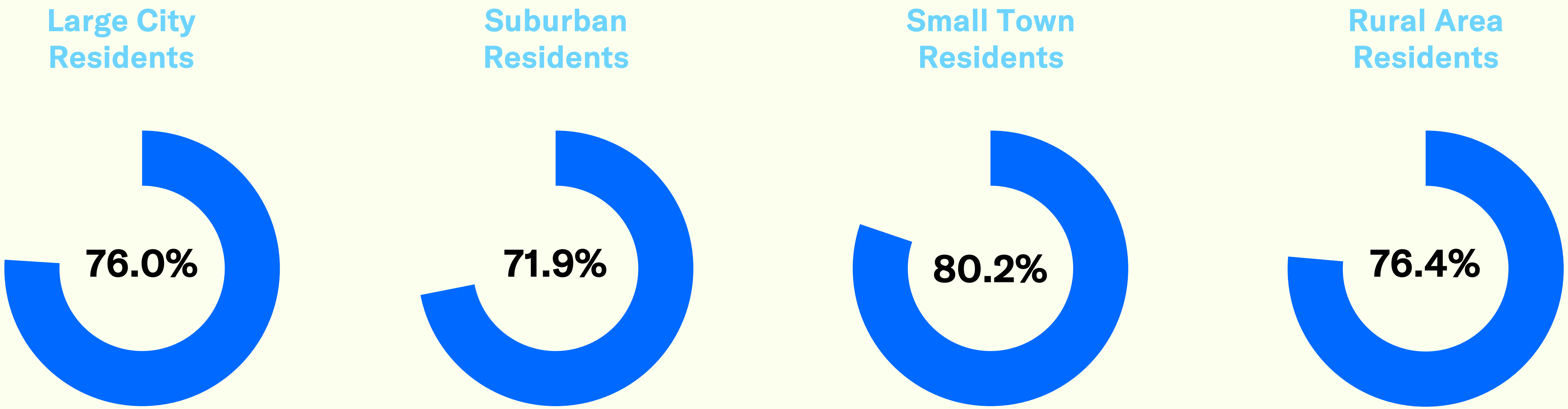
Question:
How much do you agree or disagree with the following statements? My choice of travel destinations heavily depends on affordability.



Affordability is important across the board, but agreement levels are highest among small town residents.

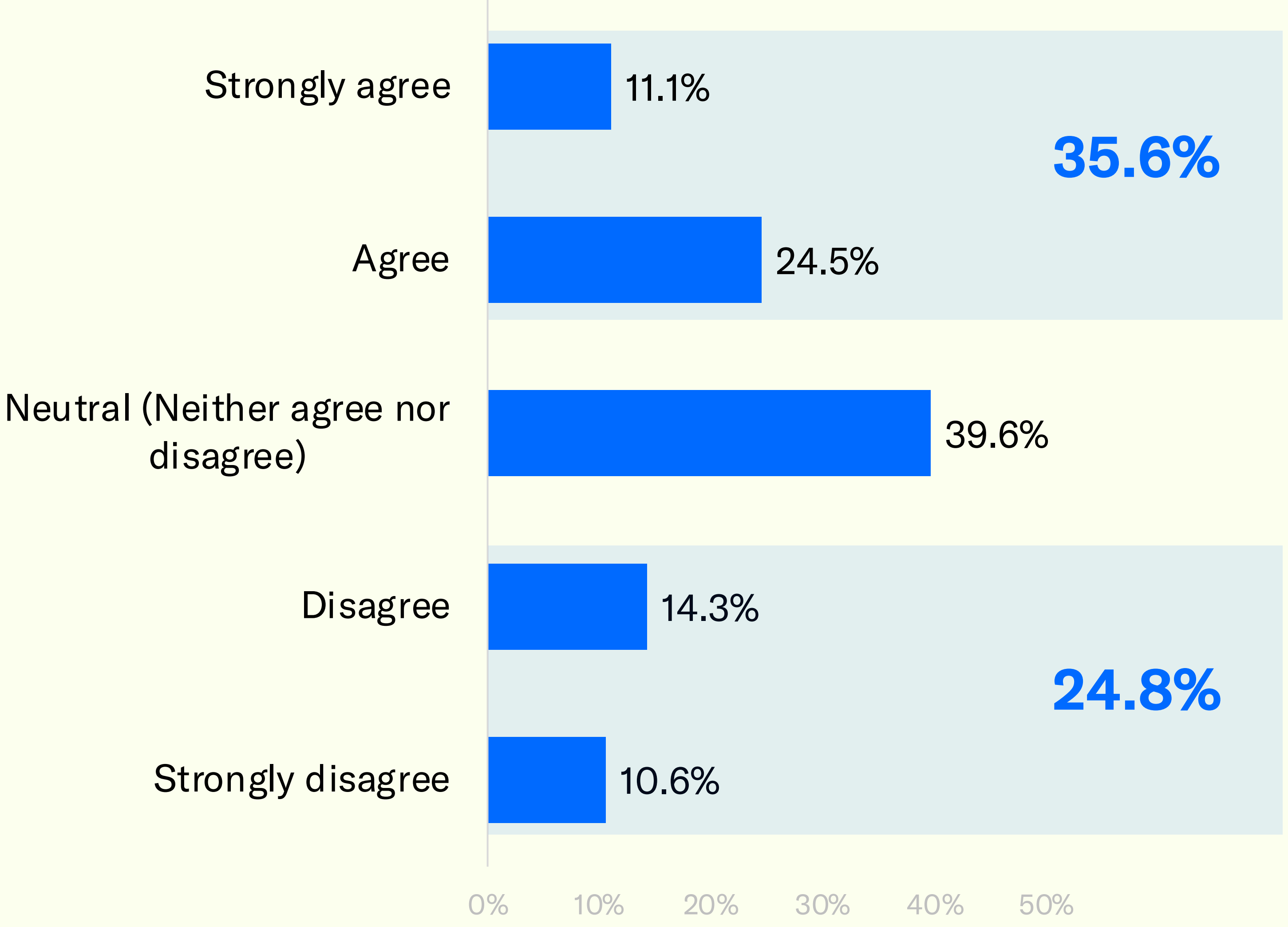
Question: How much do you agree or disagree with the following statements? My choice of travel destinations heavily depends on affordability.

Top 2 Box Agreement by Type of Residence



One-third of all travelers agree that environmental or sustainability considerations are important to their destination decision.

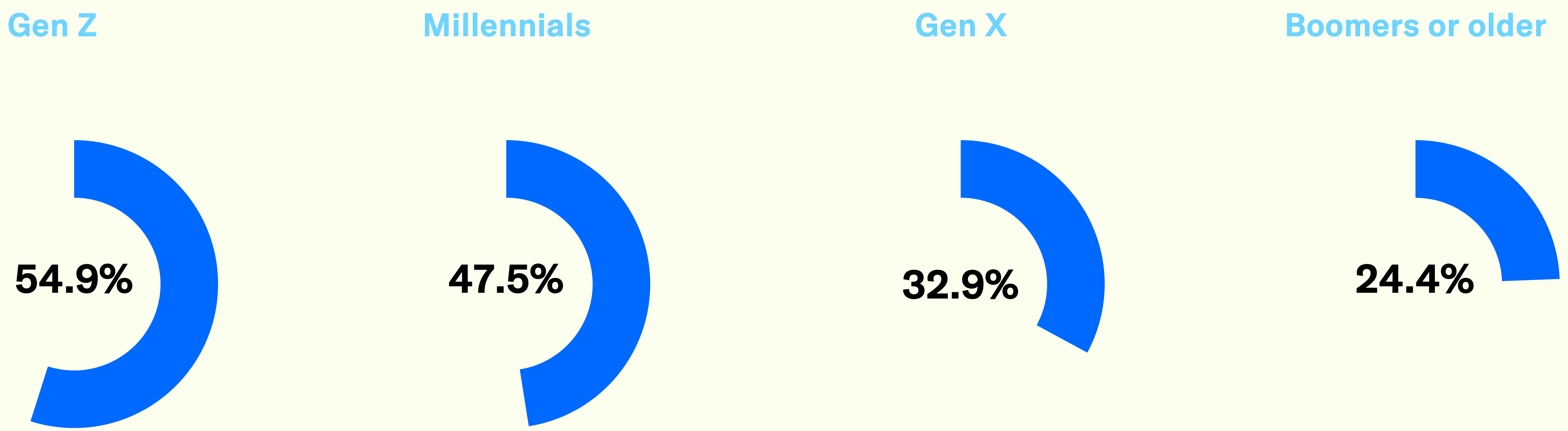
Question:
How much do you agree or disagree with the following statements? Environmental/sustainability considerations are important to how I select my travel destinations.



However, a significantly higher share of younger travelers agree that environmental or sustainability considerations factor into their decision.

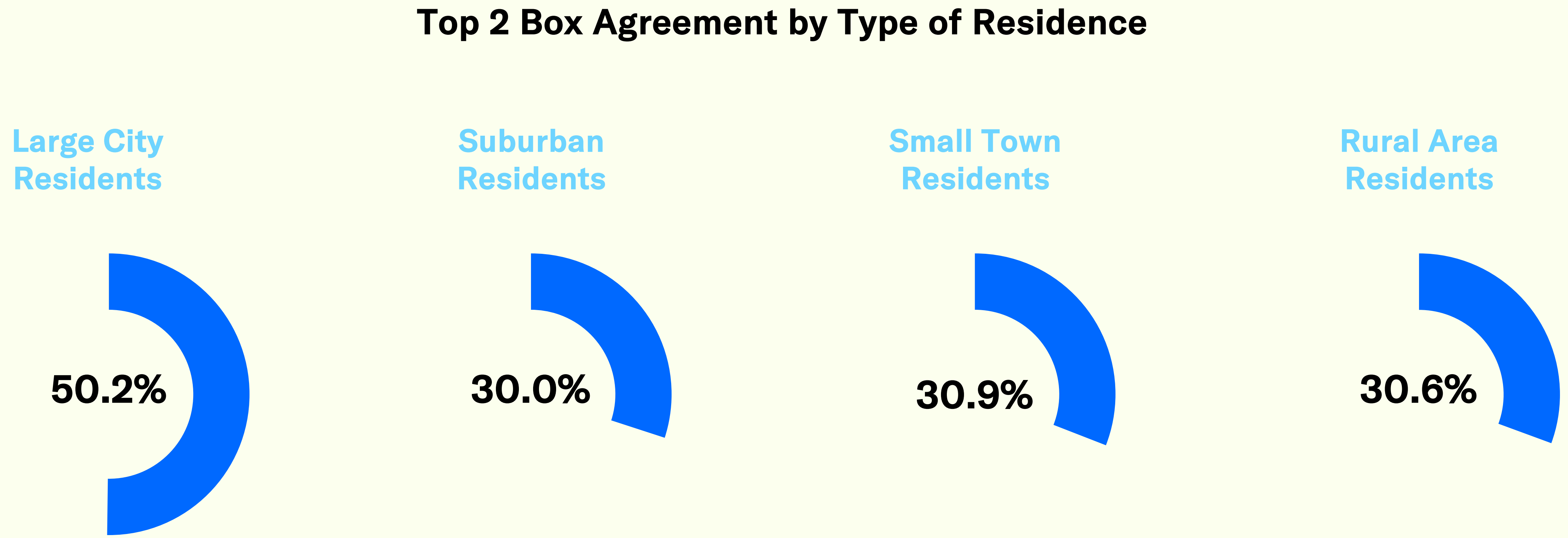
Question: How much do you agree or disagree with the following statements? Environmental/sustainability considerations are important to how I select my travel destinations.

Top 2 Box Agreement by Generation



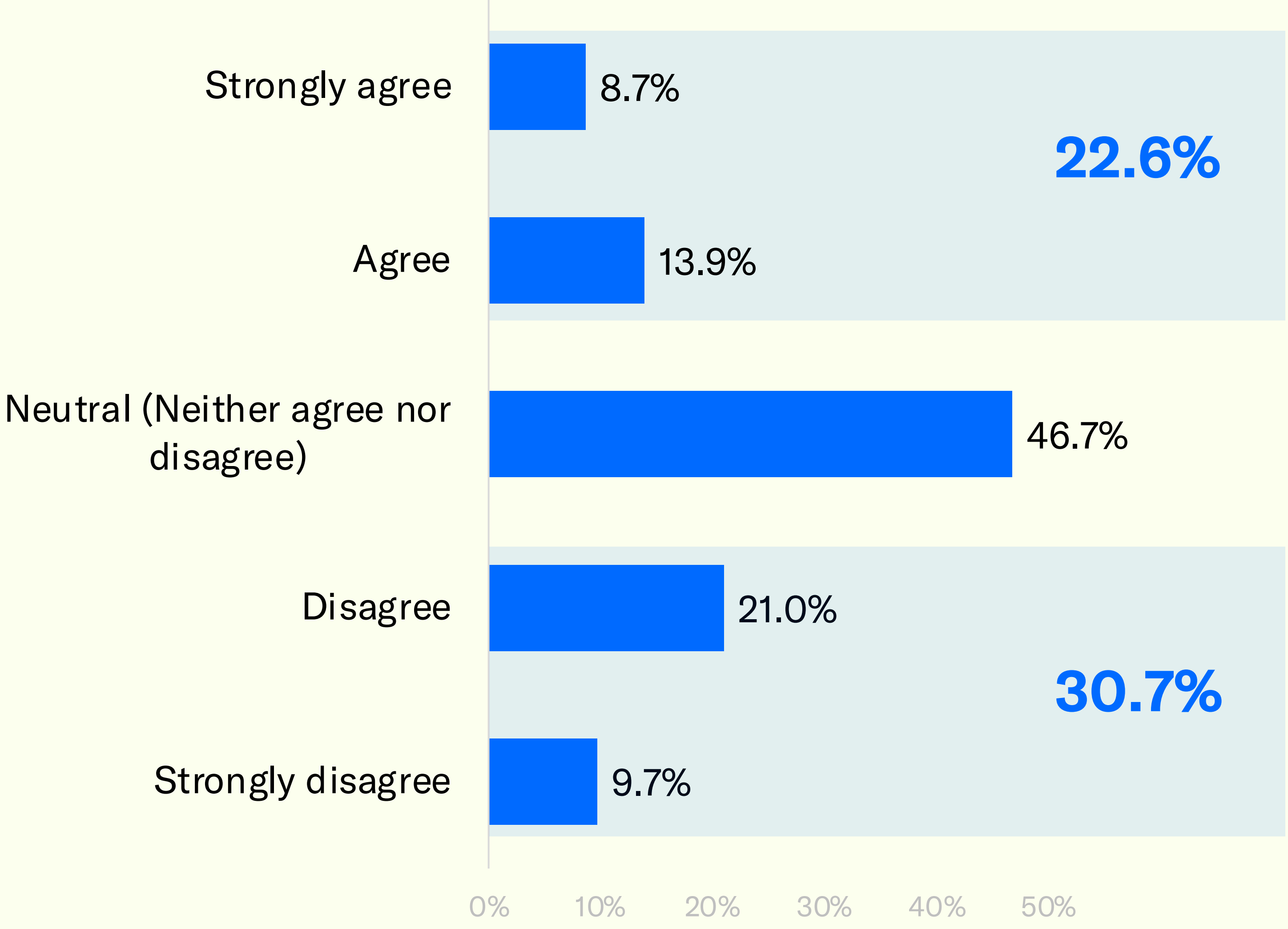
Similarly, half of large city residents agree that these considerations are important to how they decide on where to travel.

Question: How much do you agree or disagree with the following statements? Environmental/sustainability considerations are important to how I select my travel destinations.



Clashing political views is a deterrent for a share of American travelers.

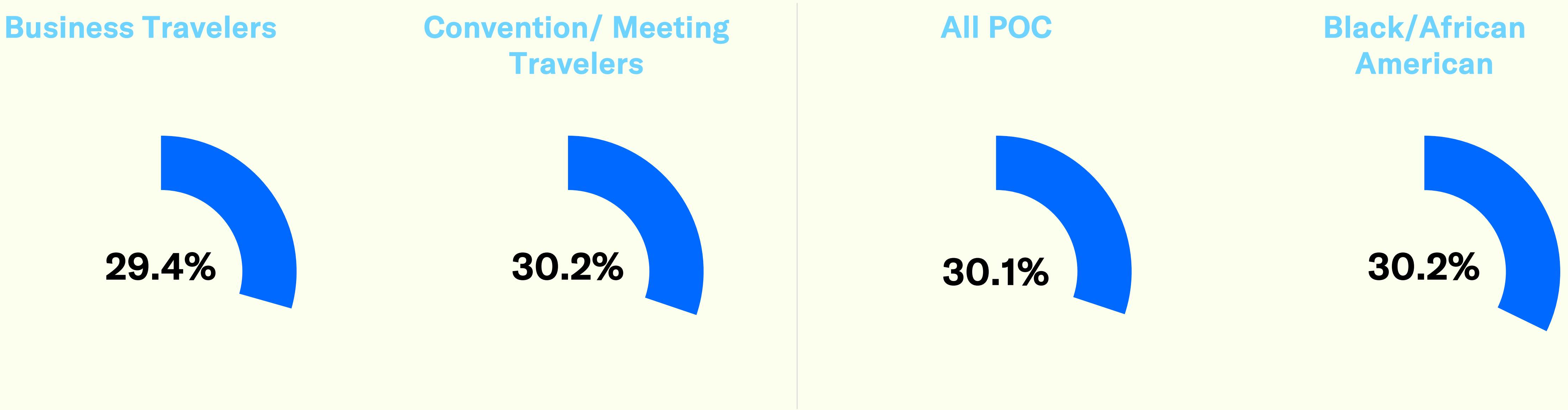
Question:
How much do you agree or disagree with the following statements? I avoid destinations where the people tend to have political views different from my own.



But business travelers and people of color, particularly Black Americans, are much more likely to agree a destination’s politics can be a deterrent.

Question: How much do you agree or disagree with the following statements? I avoid destinations where the people tend to have political views different from my own.

Top 2 Box Agreement

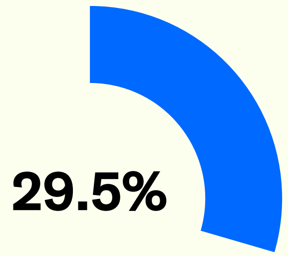


LGBTQIA+ and travelers with disabilities are also more likely to avoid destinations because of the political atmosphere.

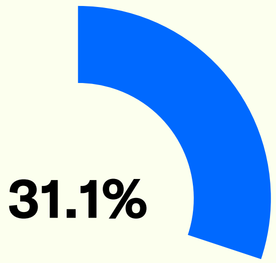
Question: How much do you agree or disagree with the following statements? I avoid destinations where the people tend to have political views different from my own.

Top 2 Box Agreement

LGBTQIA+



Travelers with Disabilities



A Look Back: 2017

Cities are the dominant destinations of late, although there is, of course, significant trip volume to rural and suburban areas

Question: Thinking about the PRIMARY DESTINATION(S) visited on this most recent overnight trip, which of these describe where you visited? (Select a that apply)

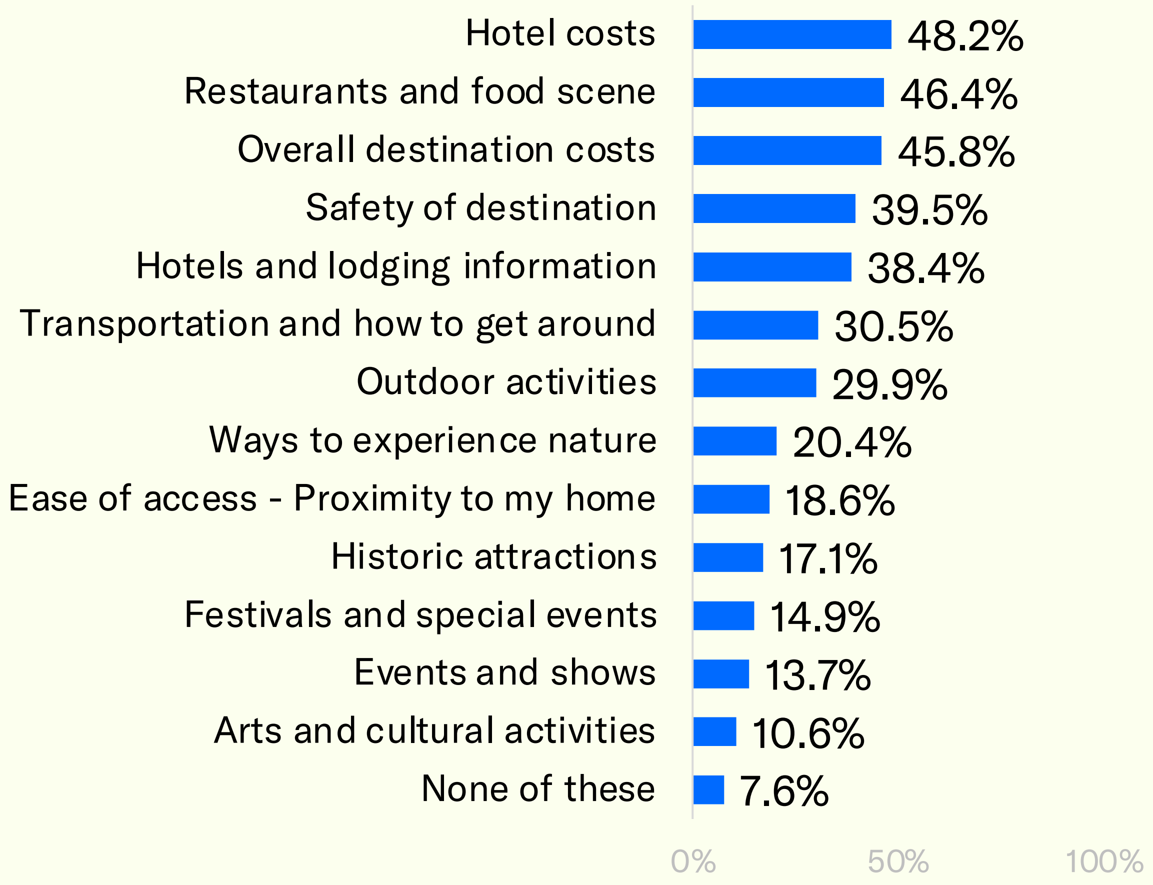
Cities or metropolitan areas	44.6%
Small towns, villages or rural destinations/attractions	24.3%
Suburban areas	24.0%
Mountain destinations/resorts (including ski resorts)	8.8%
National Parks	8.3%
State, county or regional parks or recreation areas	8.2%
Theme or amusement parks	7.9%
Desert destinations or resorts	4.0%

Beach Destinations

Costs and the food scene are key information for deciding to visit a beach destination.

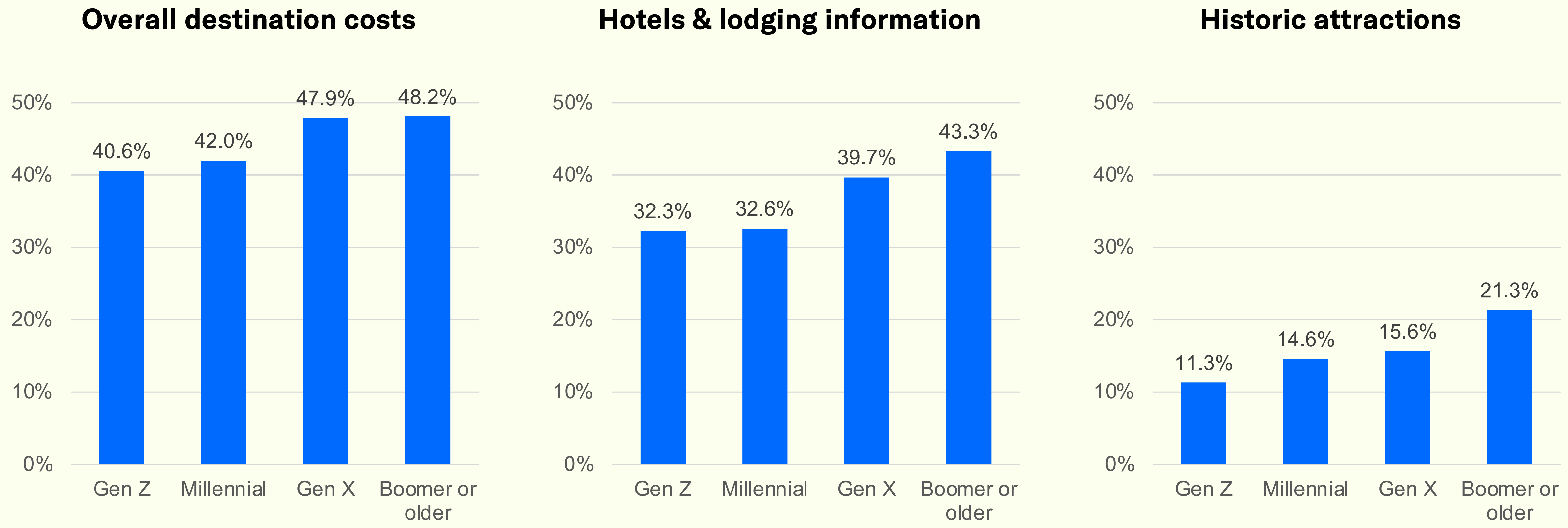
Question:
Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a BEACH DESTINATION OR RESORT?

Most important type of information for a beach destination or resort



Older travelers desire information about total costs, lodging, and historic attractions when considering a beach destination.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a BEACH DESTINATION OR RESORT?

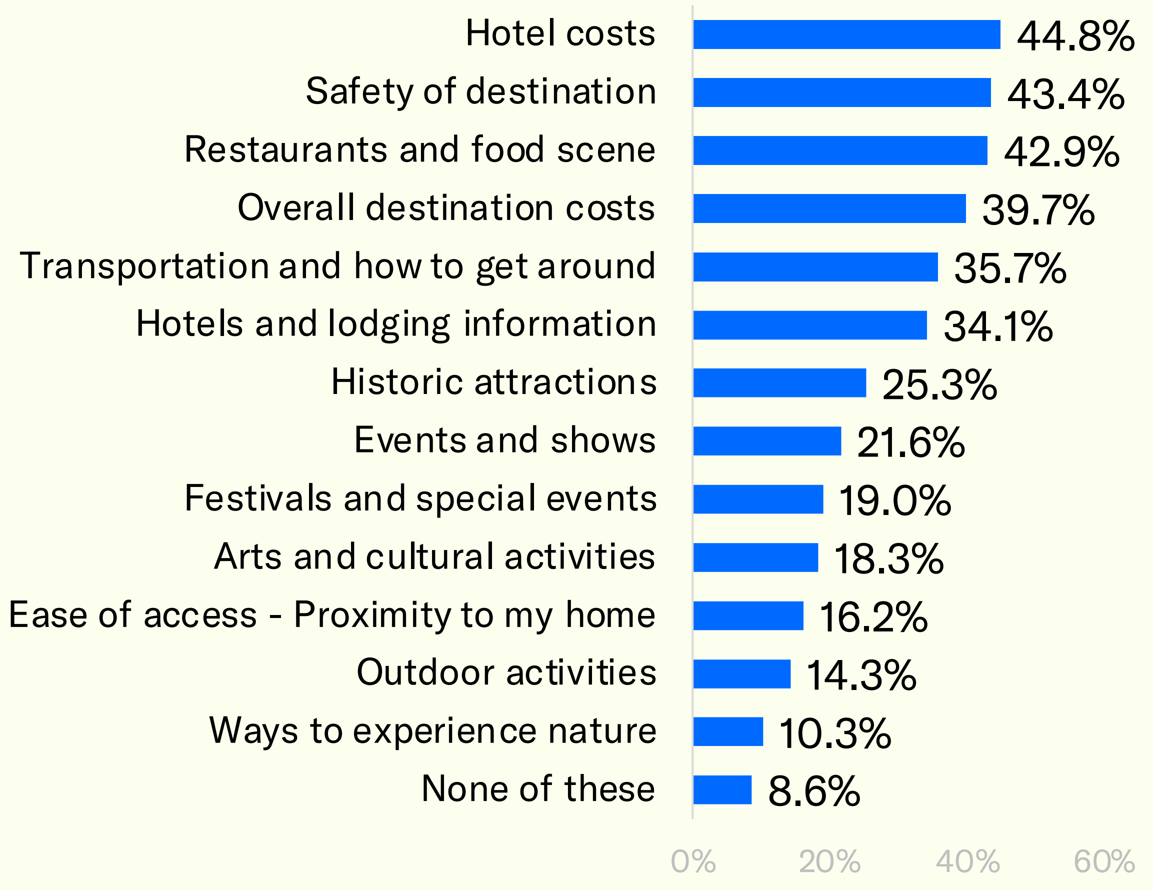


Urban Destinations

Understanding hotel costs, safety, and food scene are most important for helping travels decide on an urban destination.

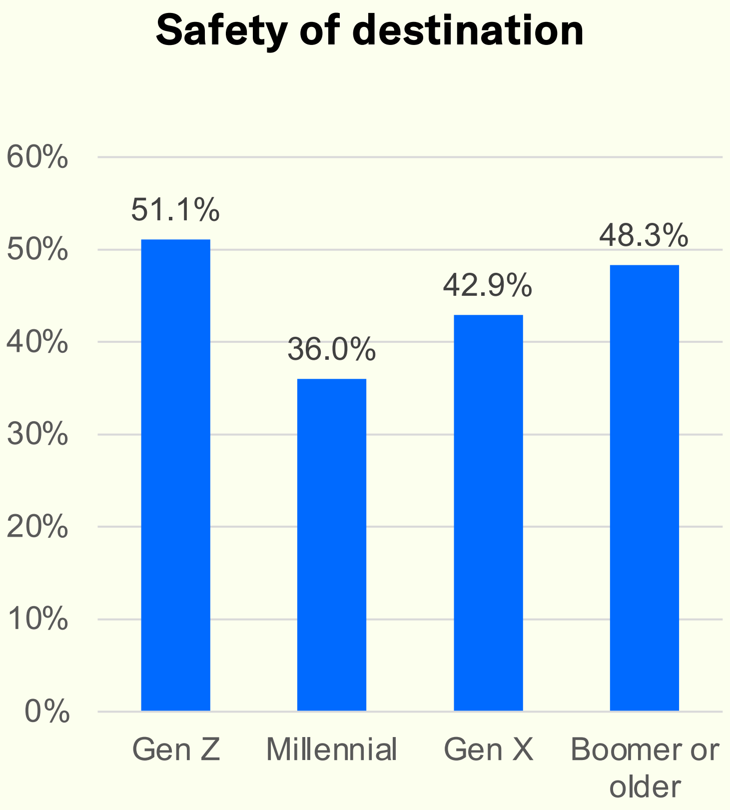
Question:
Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit an URBAN OR LARGE CITY DESTINATION?

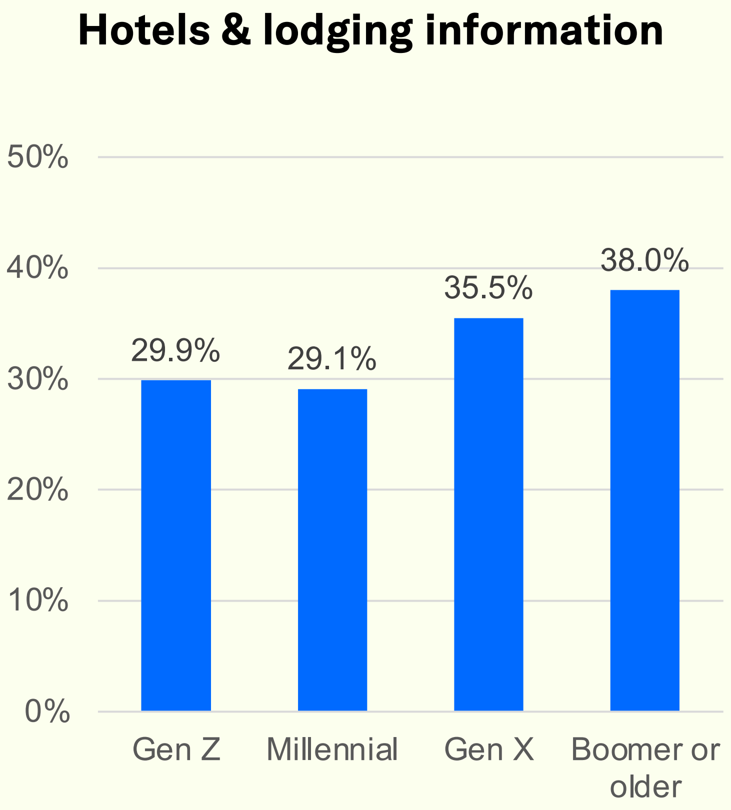
Most important type of information for an urban or large city destination

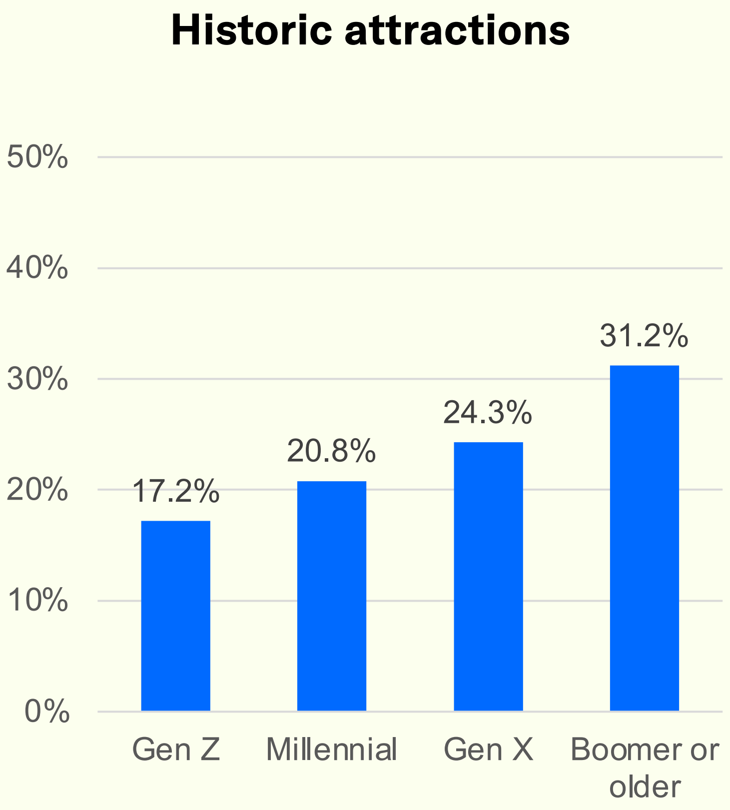


Information about safety in an urban destination is of particular importance to Gen Z travelers, but much less so for Millennials.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit an URBAN OR LARGE CITY DESTINATION?



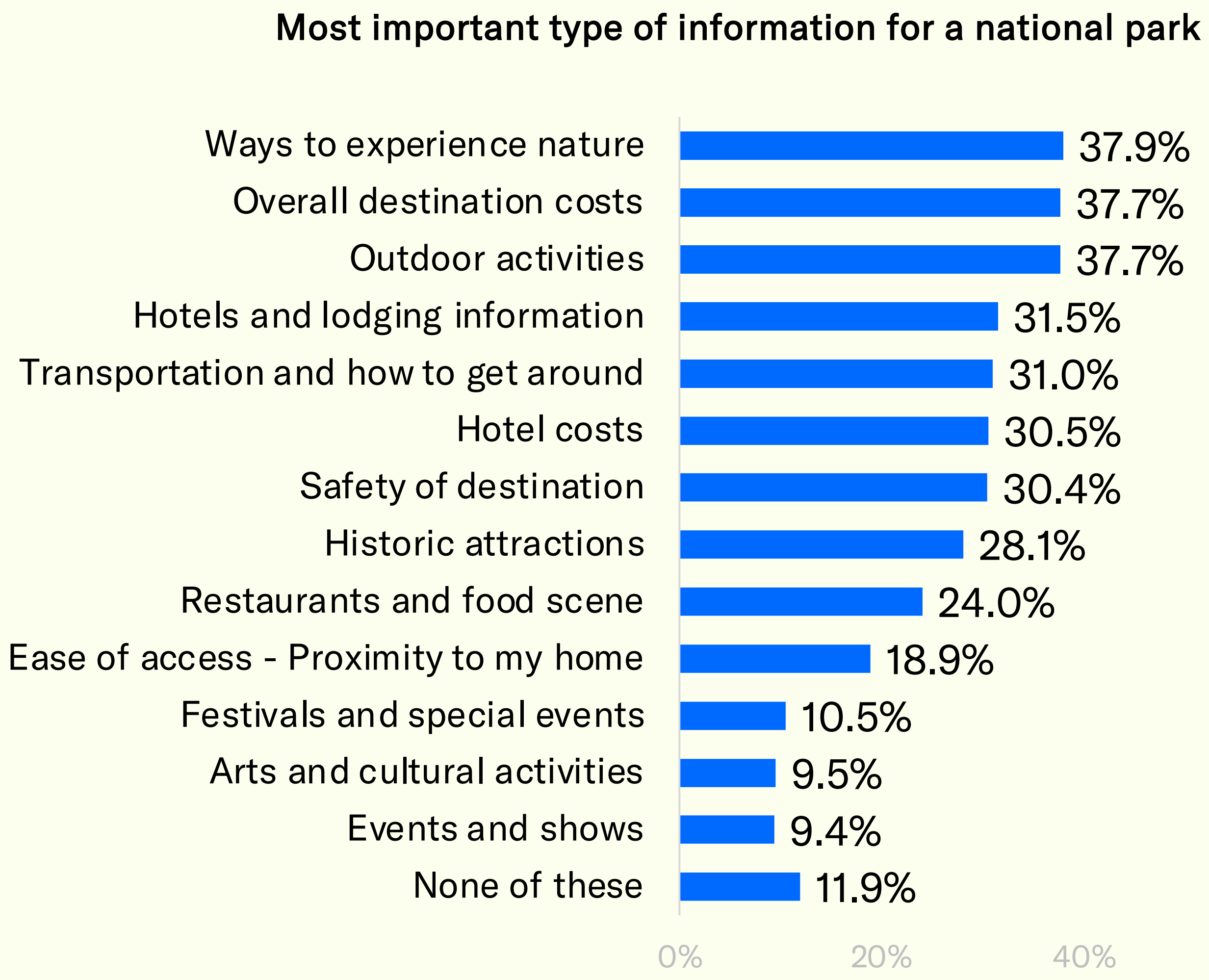




National Parks

While overall destination costs is still key information sought for national parks destinations, this is on par with information about experiencing nature and outdoor activities.

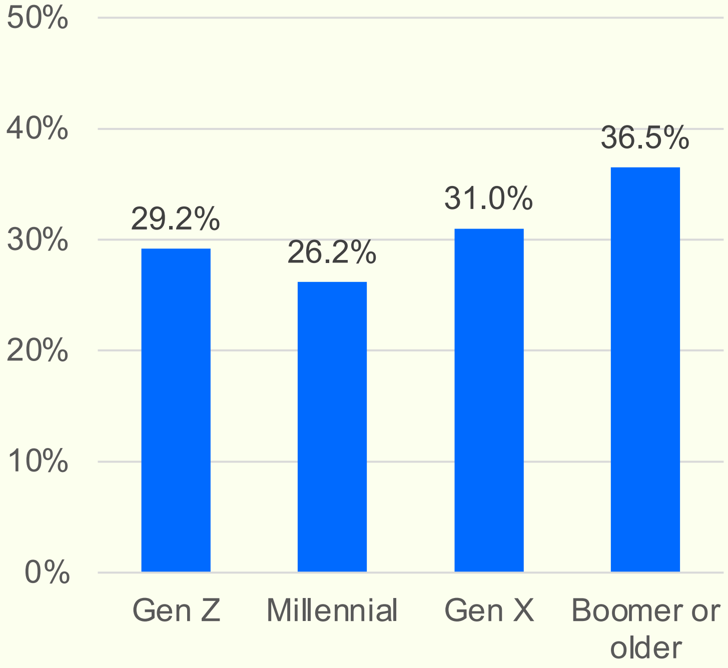
Question:
Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a NATIONAL PARK?



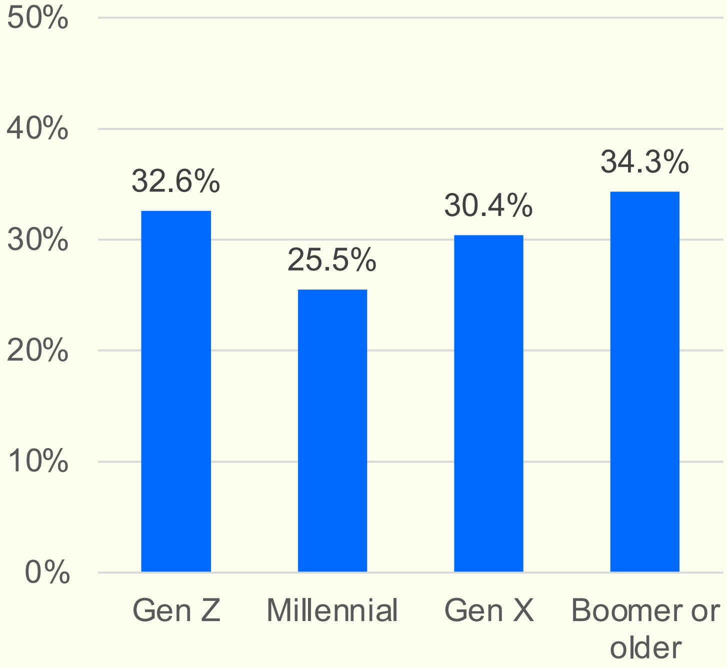
Millennials are least likely to need hotel information to decide on a national park, while Gen Z wants to know about arts & cultural activities.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a NATIONAL PARK?

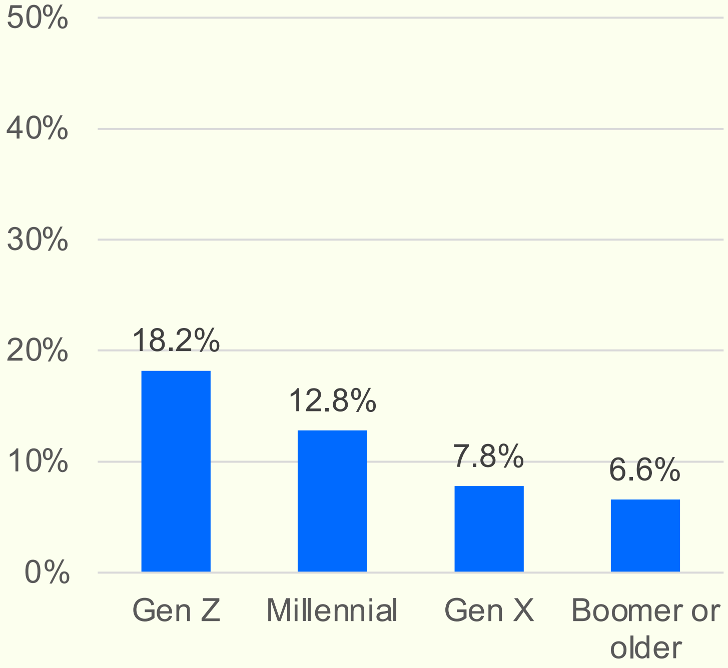
Hotels & lodging information



Hotel costs



Arts & cultural activities

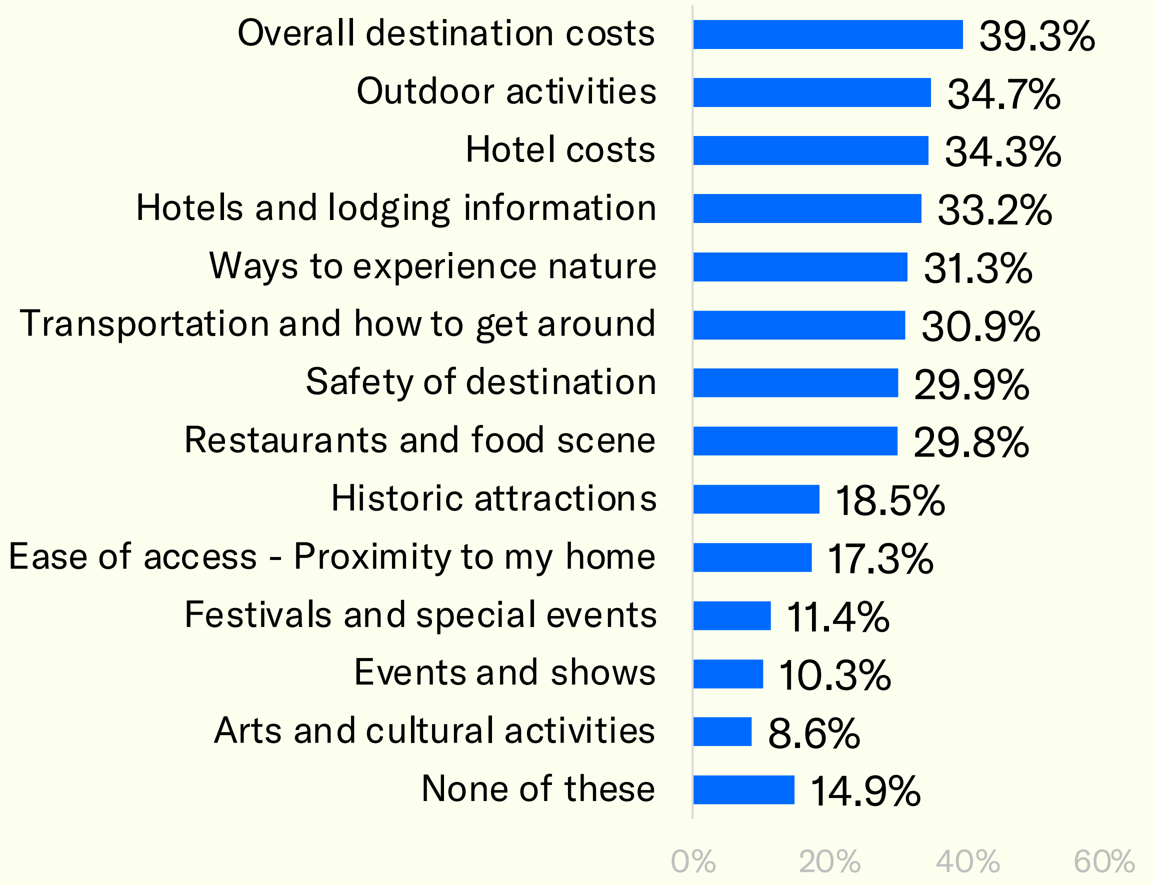


Mountain Destinations

Information about costs and outdoor activities are key for travelers when deciding on a mountain destination.

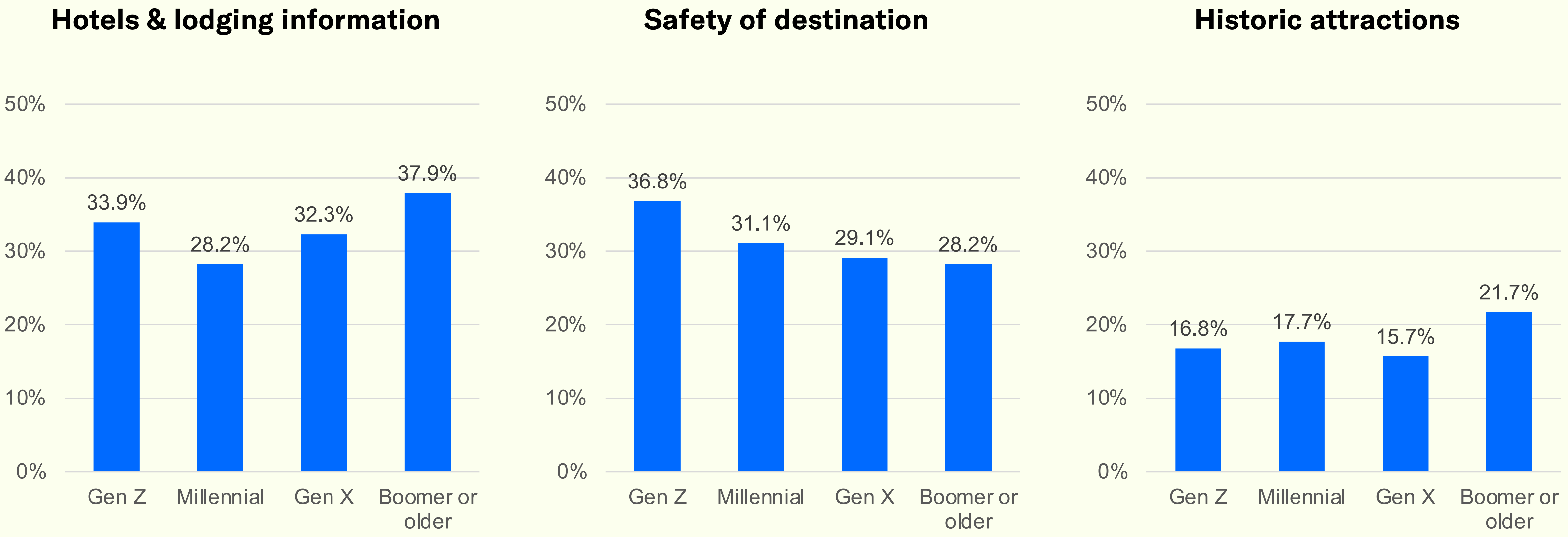
Question:
Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a MOUNTAIN DESTINATION OR RESORT?

Most important type of information for a mountain destination or resort



Gen Z travelers are more likely to state that information about a mountain destination's safety is important to their decision.

Question: Which of the following types of travel information would be MOST IMPORTANT in helping you decide to visit a MOUNTAIN DESTINATION OR RESORT?



Desired Experiences

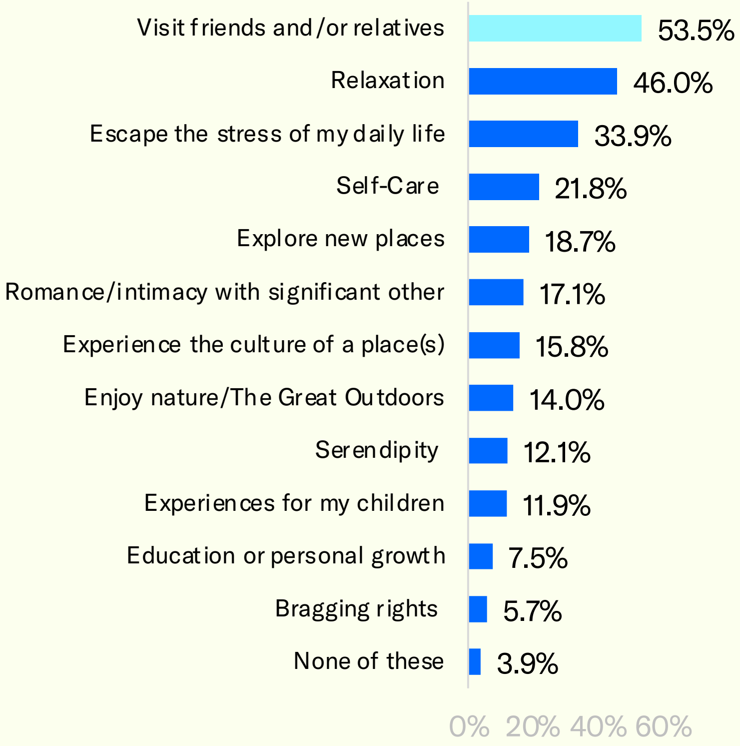
After visiting friends or relatives, relaxation and de-stressing are the top reasons for travelers' most recent overnight trip.

Question:
Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

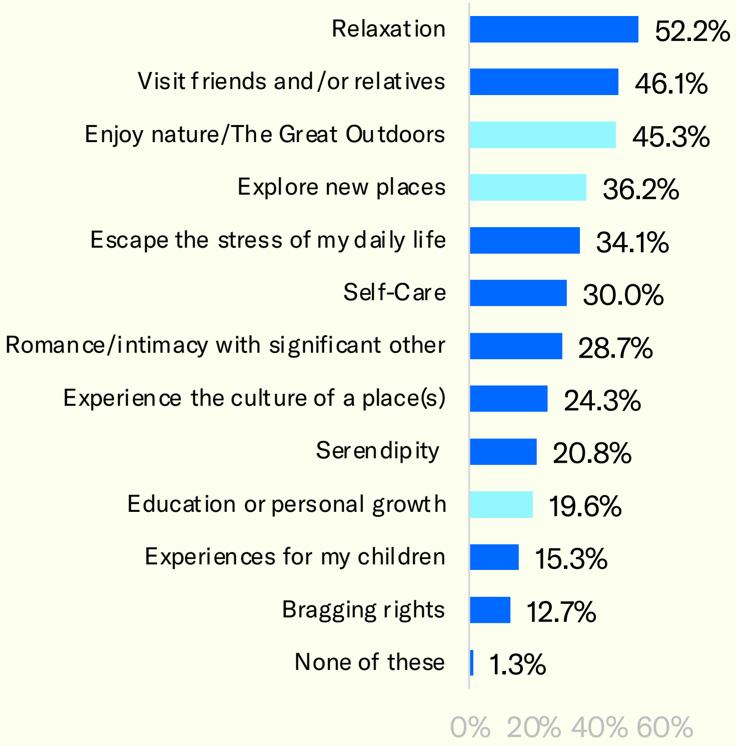
Travel motivators vary by destination type, with notable differences between those who visited urban versus outdoor destinations.

Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

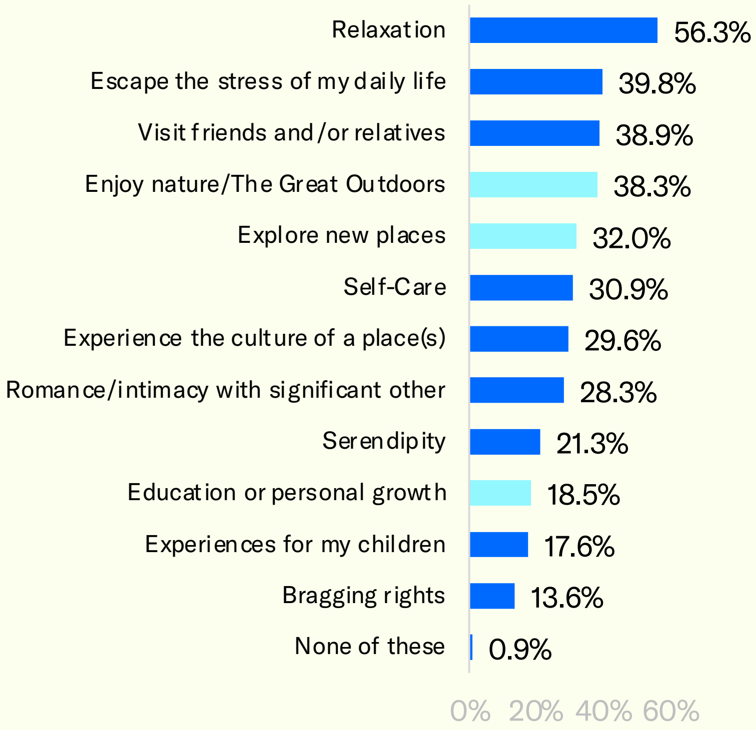
Most Recent Overnight Trip Destination: Urban



Most Recent Overnight Trip Destination: Mountain

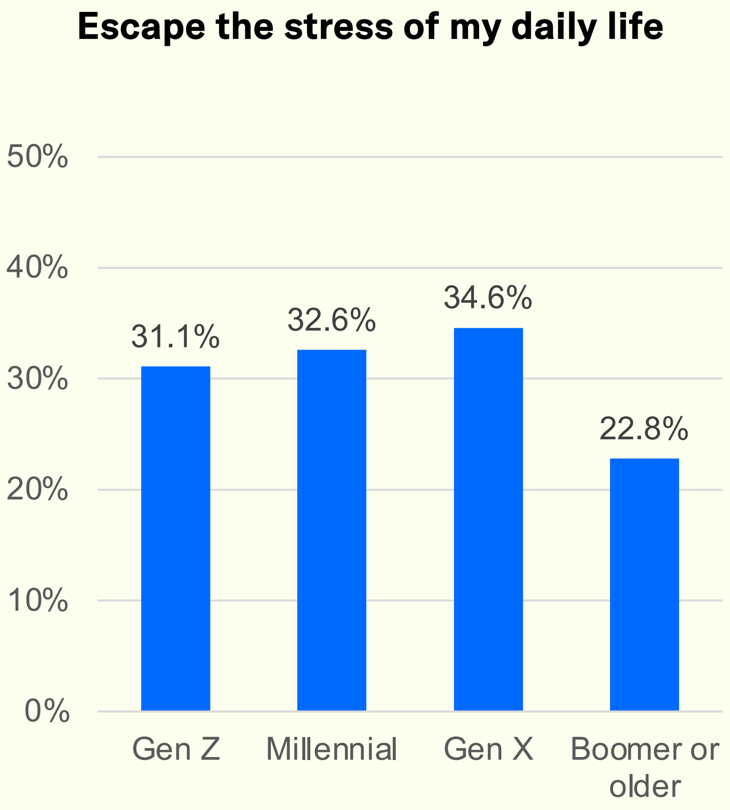


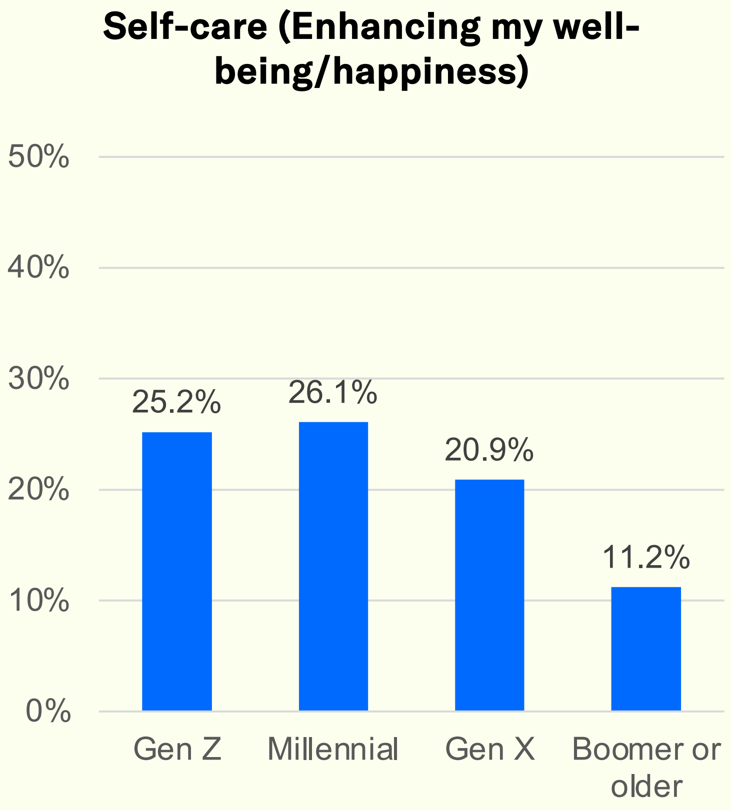
Most Recent Overnight Trip Destination: National Park

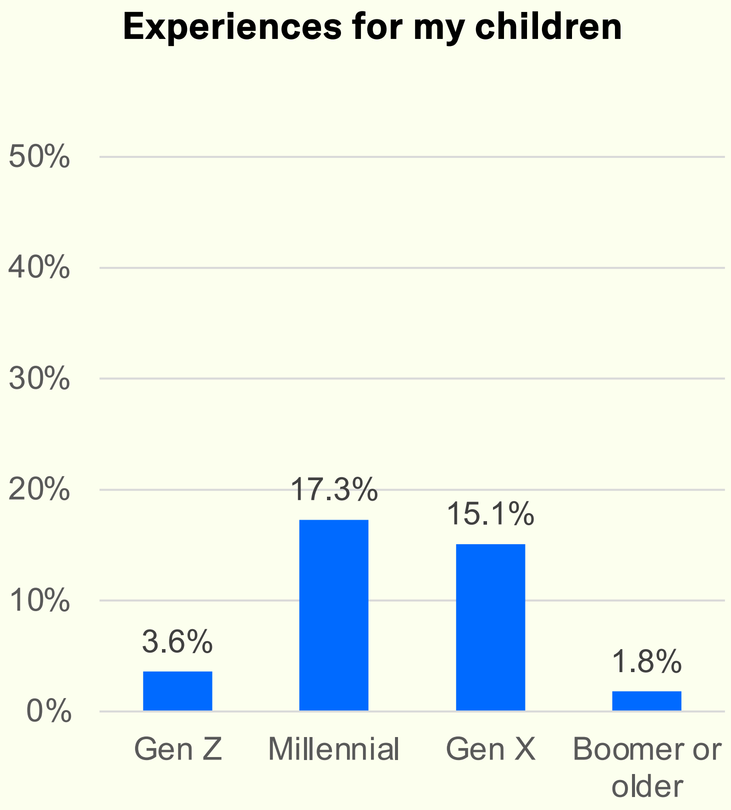


Millennials and Gen X are most likely to say they took their most recent overnight trip for experiences for their children.

Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

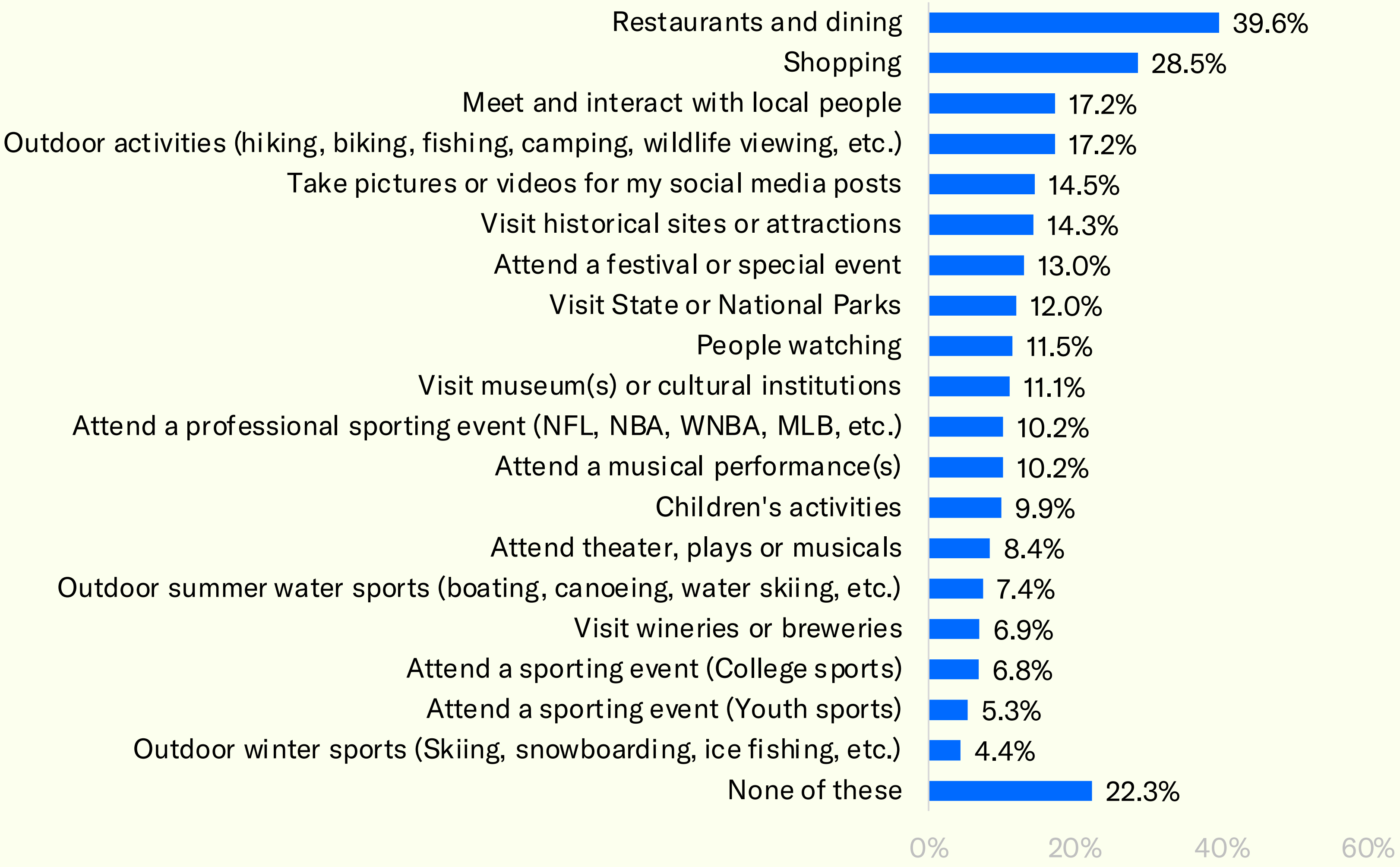






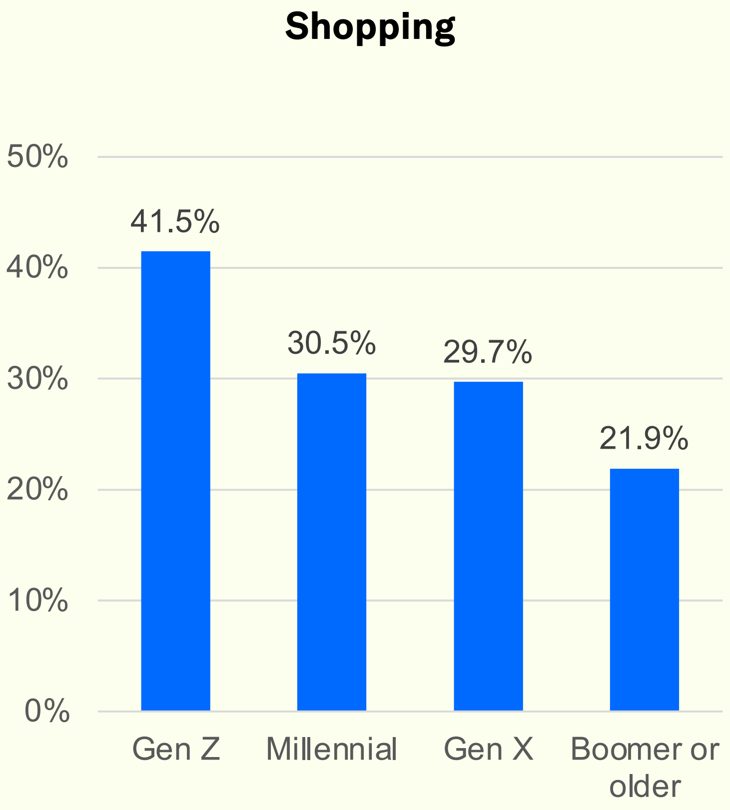
Dining and shopping activities were by far the most important in traveler's decision to take their most recent overnight trip.

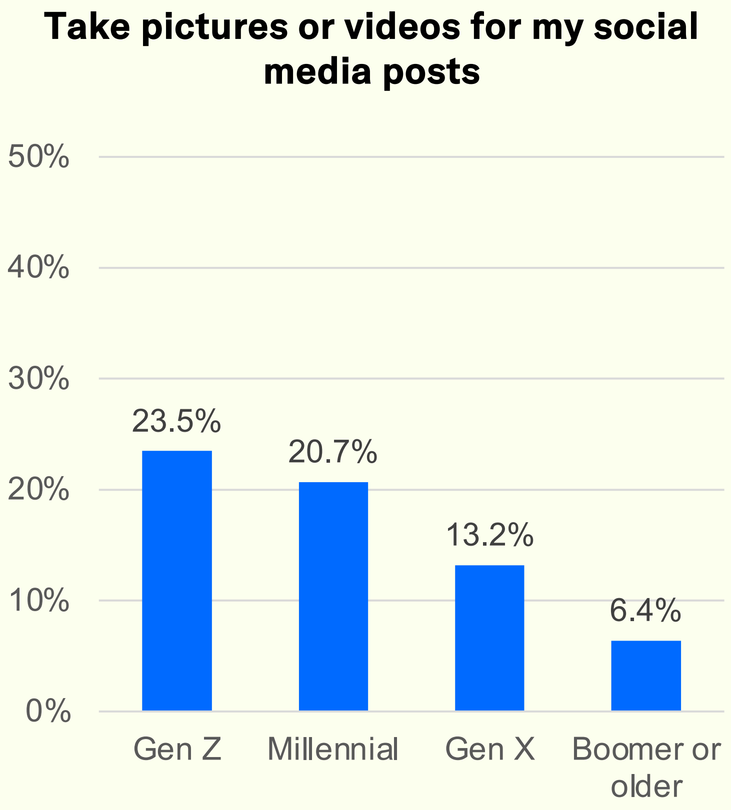
Question:
Which of the following SPECIFIC TRAVEL ACTIVITIES were important in your decision to take this most recent overnight trip?

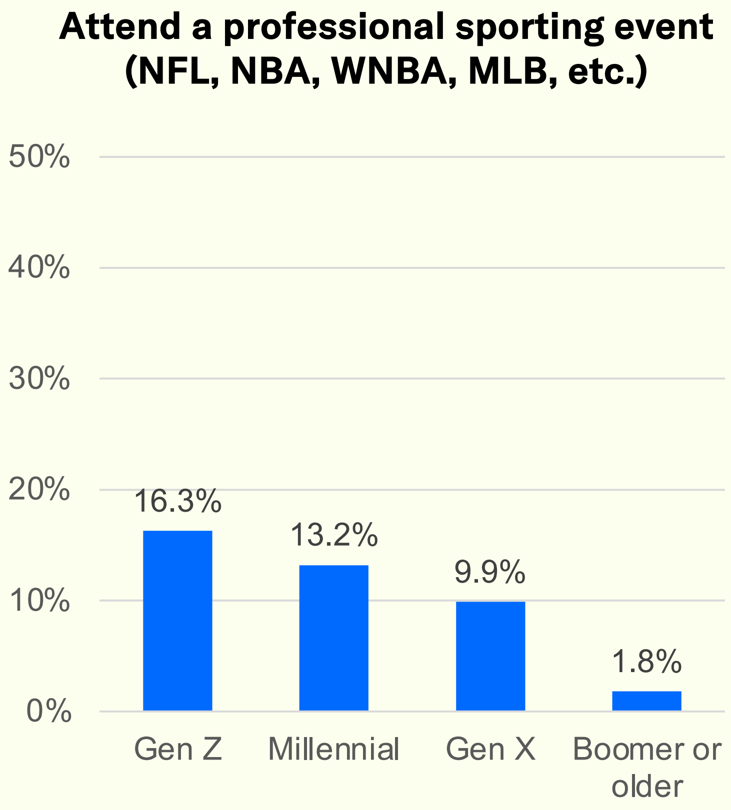


Shopping is especially important for Gen Z, while social media content was a decision driver among both Gen Z and Millennials.

Question: Which of the following SPECIFIC TRAVEL ACTIVITIES were important in your decision to take this most recent overnight trip?







A Look Back: 2017

Domestic Hotlist

% of American Leisure Travelers

LAS VEGAS	**19.4%**
NEW YORK CITY	18.4%
ORLANDO/DISNEY WORLD	12.4%
FLORIDA	10.1%
LOS ANGELES	7.5%
HAWAII	7.0%
CALIFORNIA	6.7%
CHICAGO	6.3%
SAN FRANCISCO	6.2%
MIAMI	6.1%
WASHINGTON DC	5.6%
GRAND CANYON NP	4.8%
SAN DIEGO	4.7%
YELLOWSTONE NP	4.5%
NEW ORLEANS	4.1%
MYRTLE BEACH	3.6%
BOSTON	3.3%
ATLANTA	3.1%
SEATTLE	3.0%
DENVER	2.7%

International Hotlist

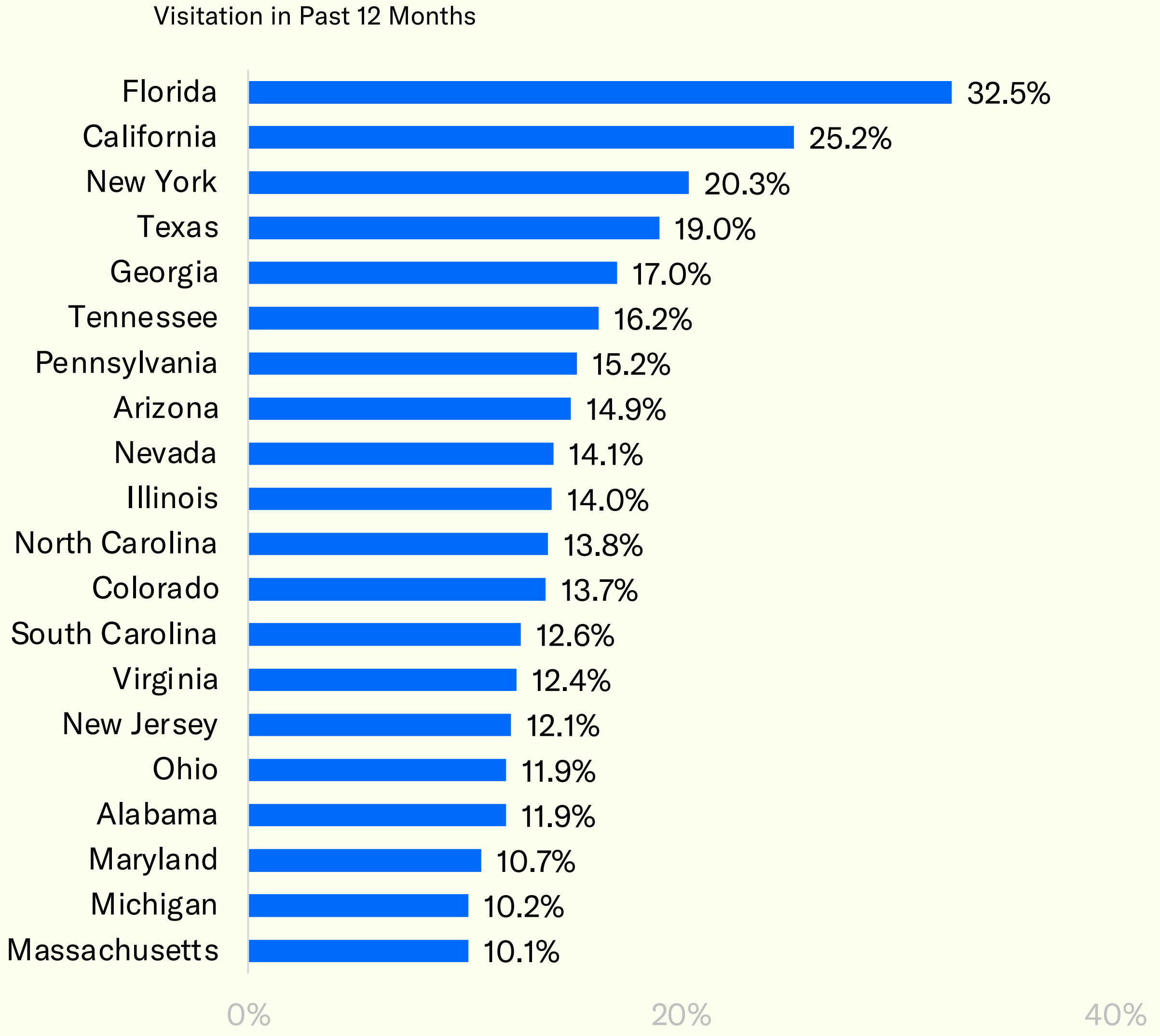
% of American Leisure Travelers

FRANCE	**12.3%**
ITALY	11.7%
UNITED KINGDOM	11.4%
MEXICO	10.3%
CANADA	9.8%
JAPAN	7.3%
GERMANY	5.6%
SPAIN	5.3%
IRELAND	4.5%
AUSTRALIA	4.4%
CHINA	3.1%
JAMAICA	3.1%
BAHAMAS	2.7%
GREECE	2.0%
BRAZIL	1.8%
SWEDEN	1.2%
HOLLAND	1.2%
NEW ZEALAND	1.1%
SWITZERLAND	1.1%
INDIA	0.7%

Domestic Hotspots

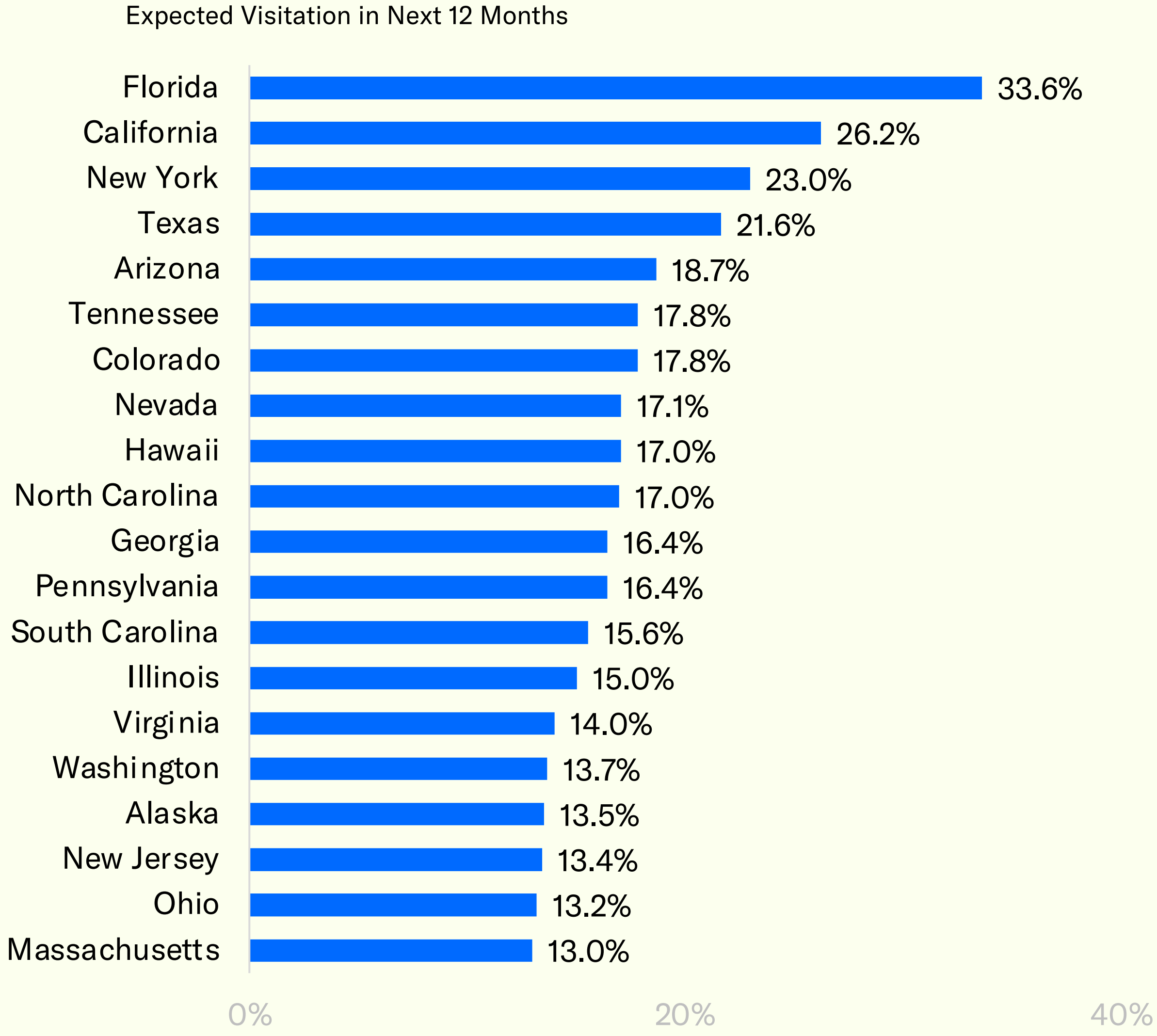
Florida tops the list of state destinations that travelers have been to in the past 12 months.

Question:
Which of these states have you visited (or traveled within) in the PAST 12 MONTHS and which will you be likely to visit (or travel within) in the NEXT 12 MONTHS?



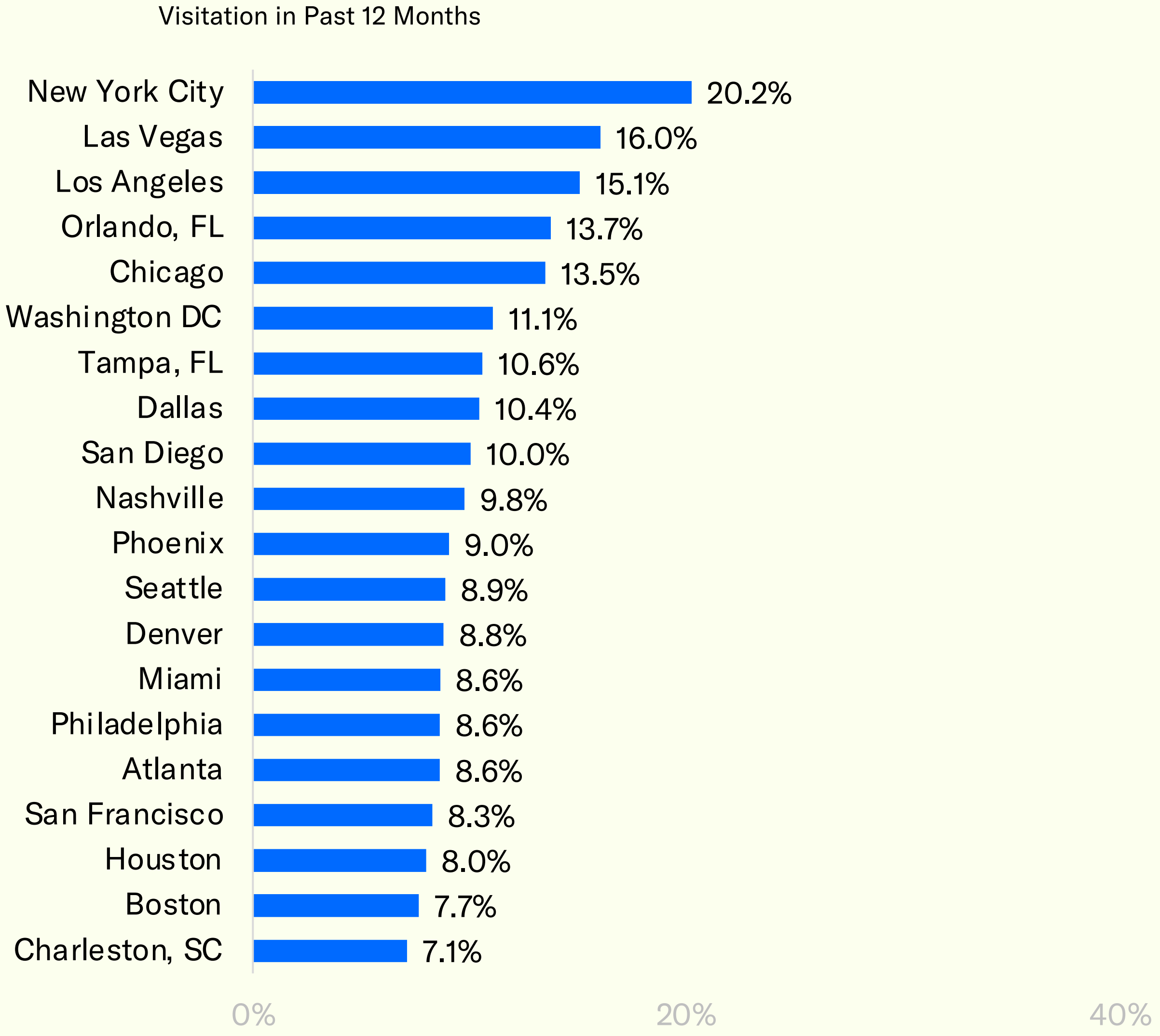
Florida also outpaces California and New York as the state American travelers are most likely to visit in the next 12 months.

Question:
Which of these states have you visited (or traveled within) in the PAST 12 MONTHS and which will you be likely to visit (or travel within) in the NEXT 12 MONTHS?



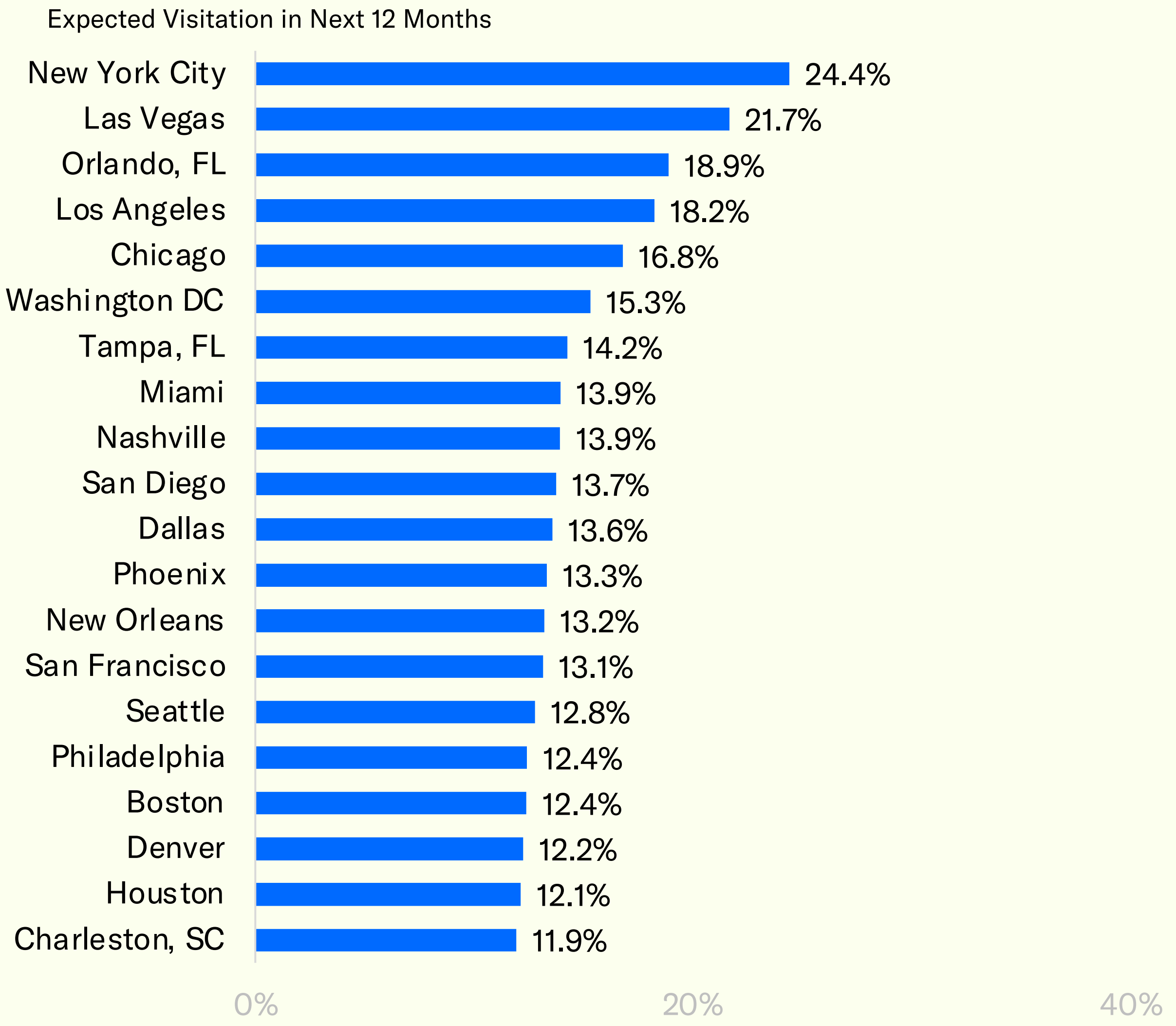
New York City is the most-visited domestic destination in the past 12 months.

Question:
Which of these destinations have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?



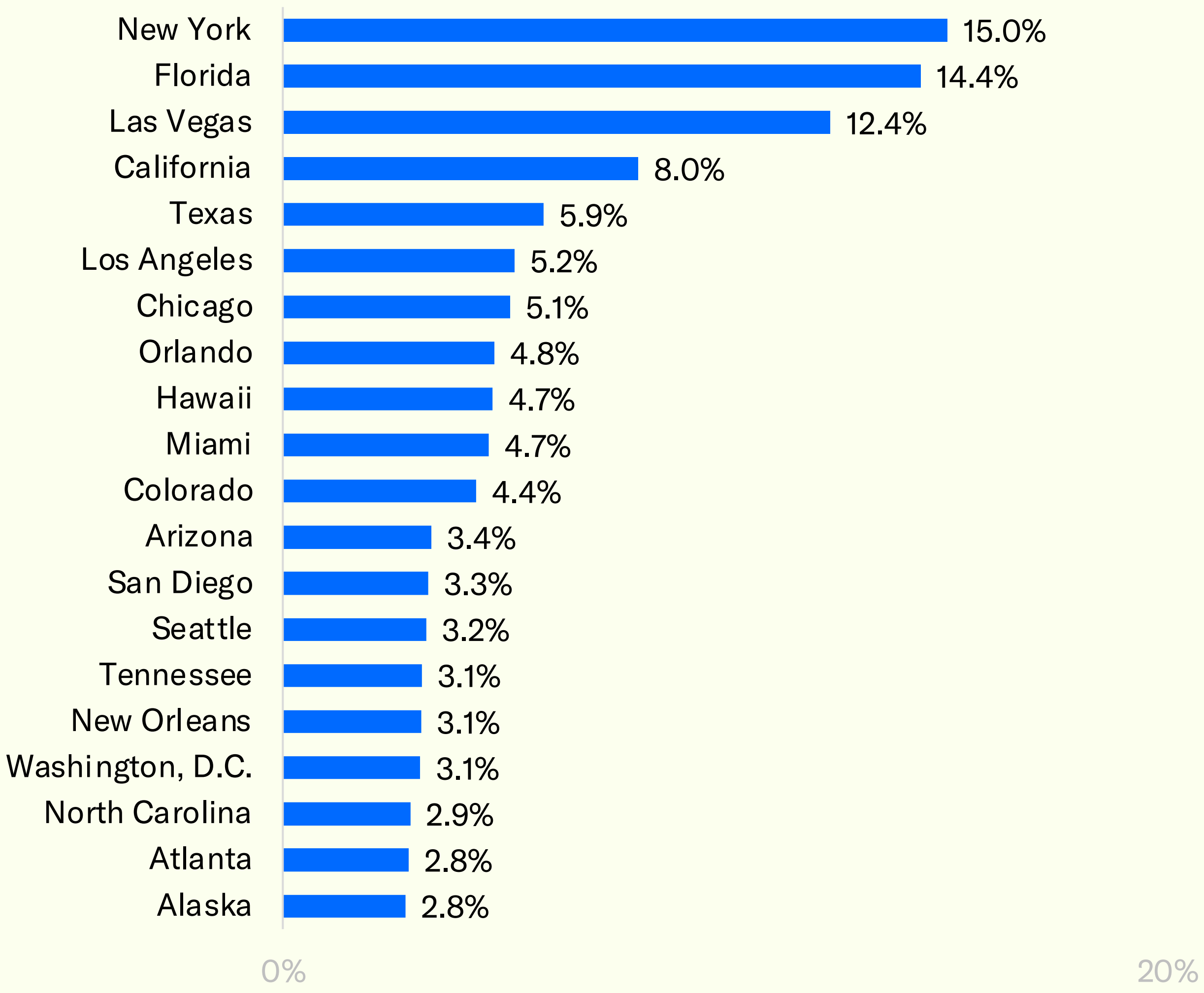
Similarly, travelers are most likely to say they will visit New York City in the next year, followed by Las Vegas.

Question:
Which of these destinations have you visited in the PAST 12 MONTHS and which will you be likely to visit in the NEXT 12 MONTHS?



Unsurprisingly, New York and Florida were the top mentioned domestic destinations that travelers most want to visit in the next year.

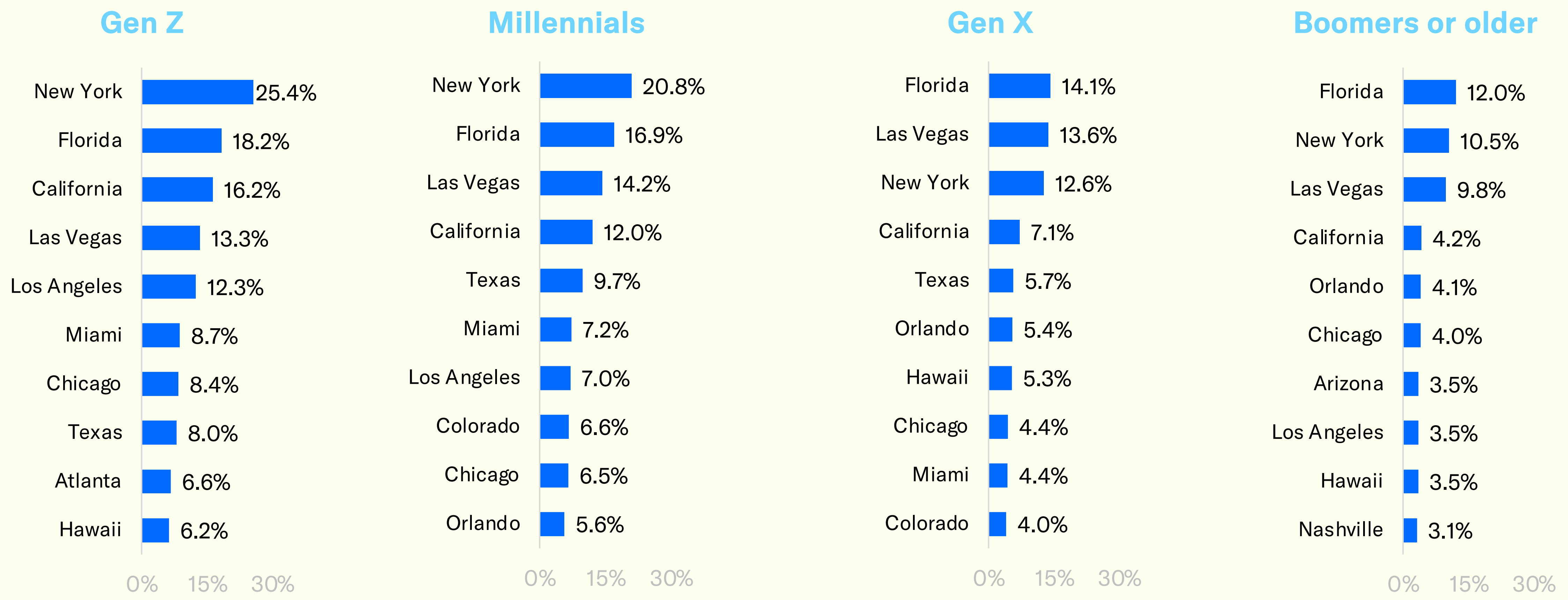
Question:
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)



New York is the most mentioned domestic destination for younger travelers, while Florida tops the list for Gen X and Boomers.

Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)

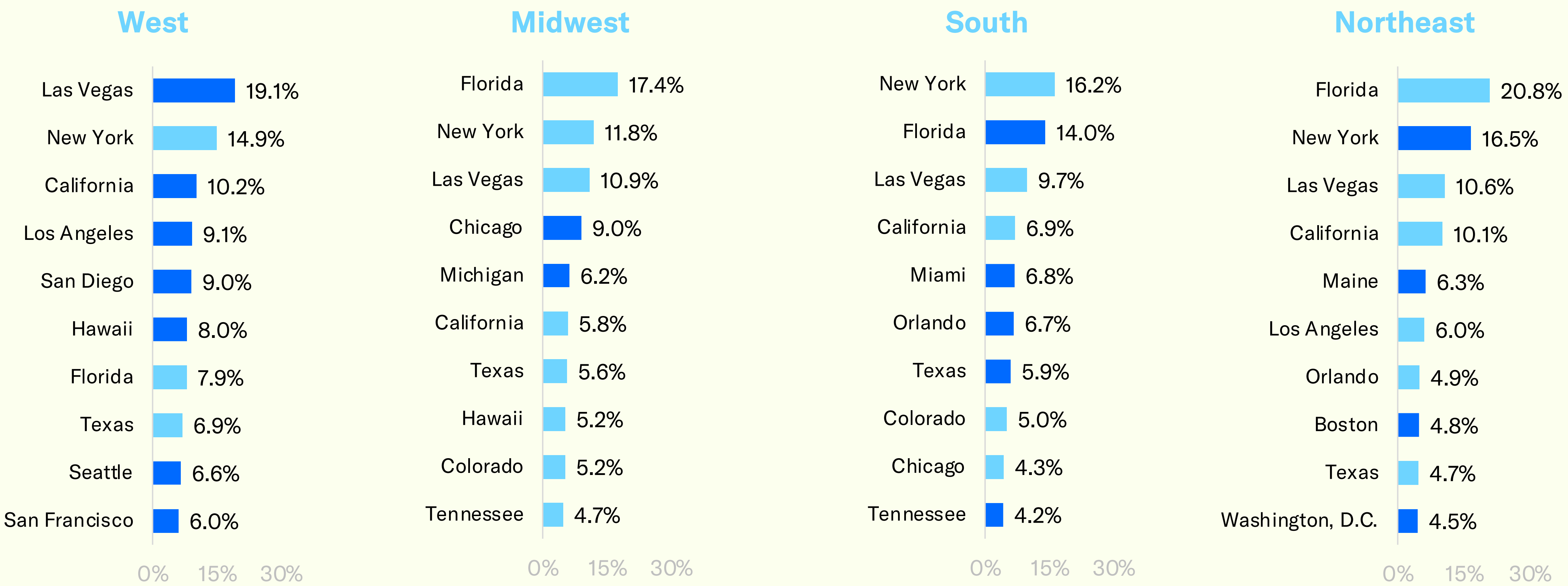
Hotlist by Generation



Midwest and Northeast residents are more to say destinations outside of their home region on their domestic hotlist.

Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)

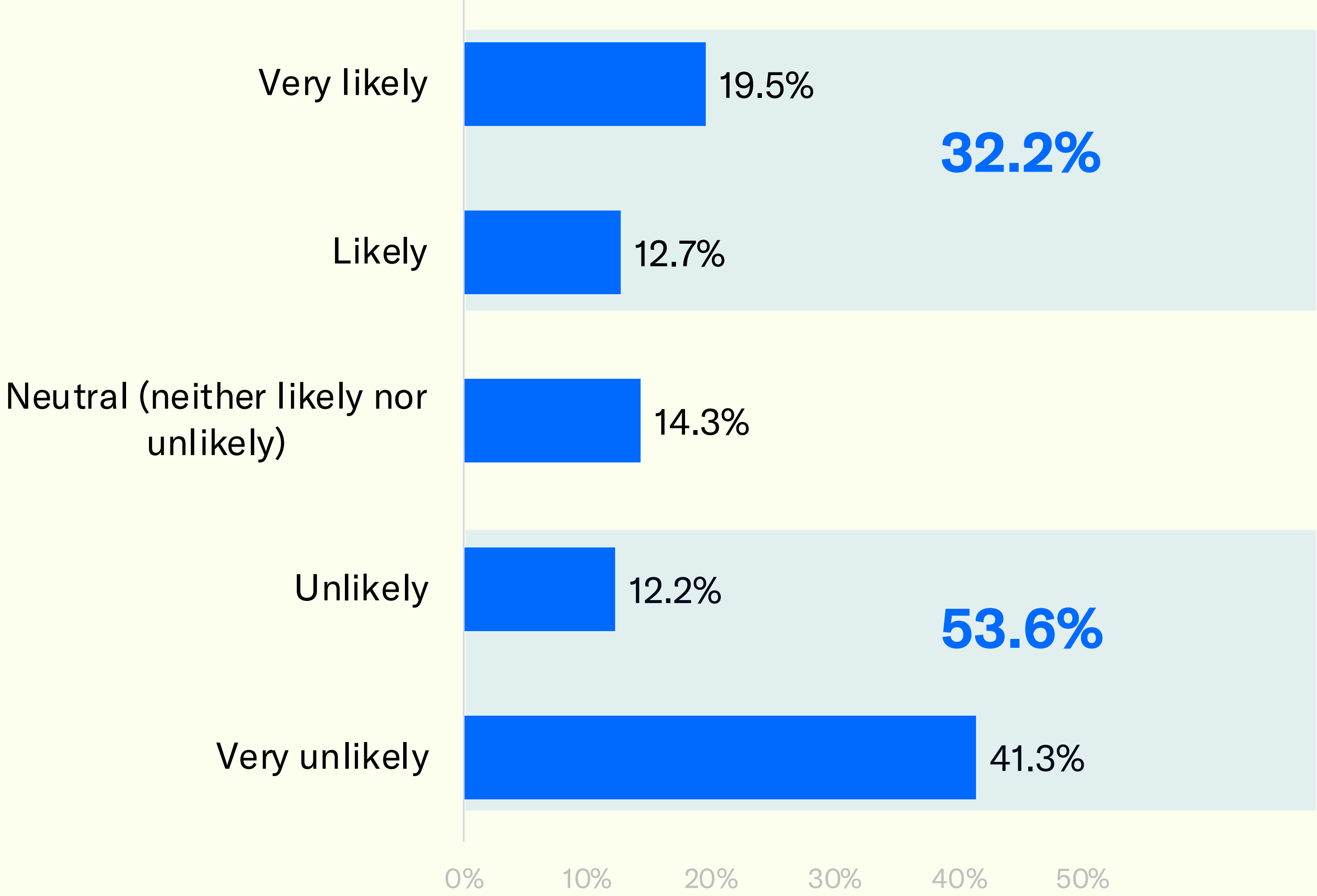
Hotlist by Region



International Hotspots

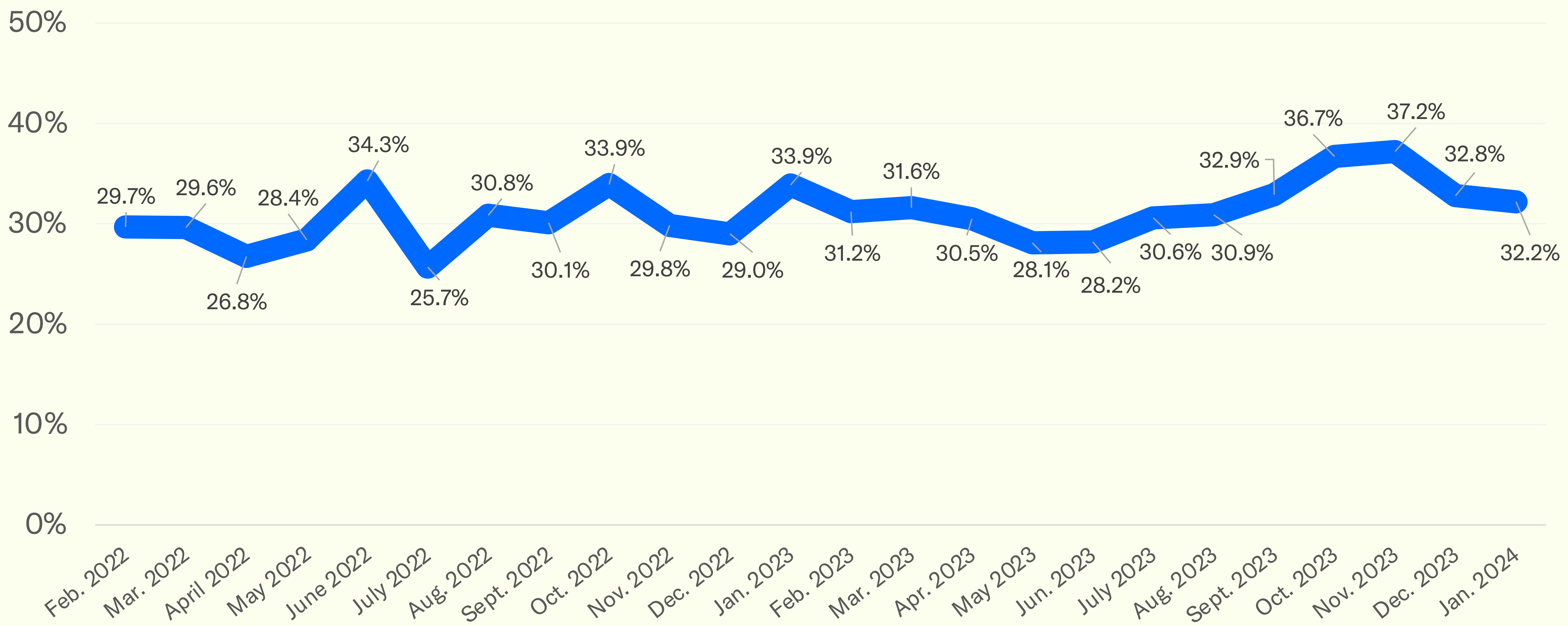
One-third of all travelers are likely to travel abroad in 2024.

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



Despite a slight drop after a peak in Fall 2023, current international travel expectations still outpace the first half of 2023.

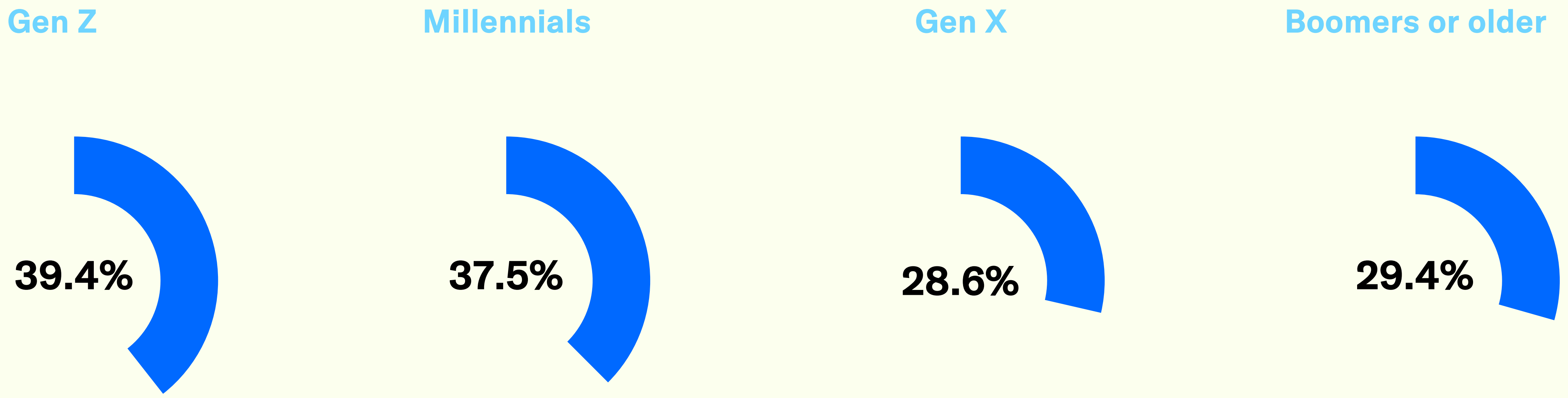
Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?



International travel likelihood in 2024 is highest among Gen Z and Millennial travelers but still strong among GenX and Boomers

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

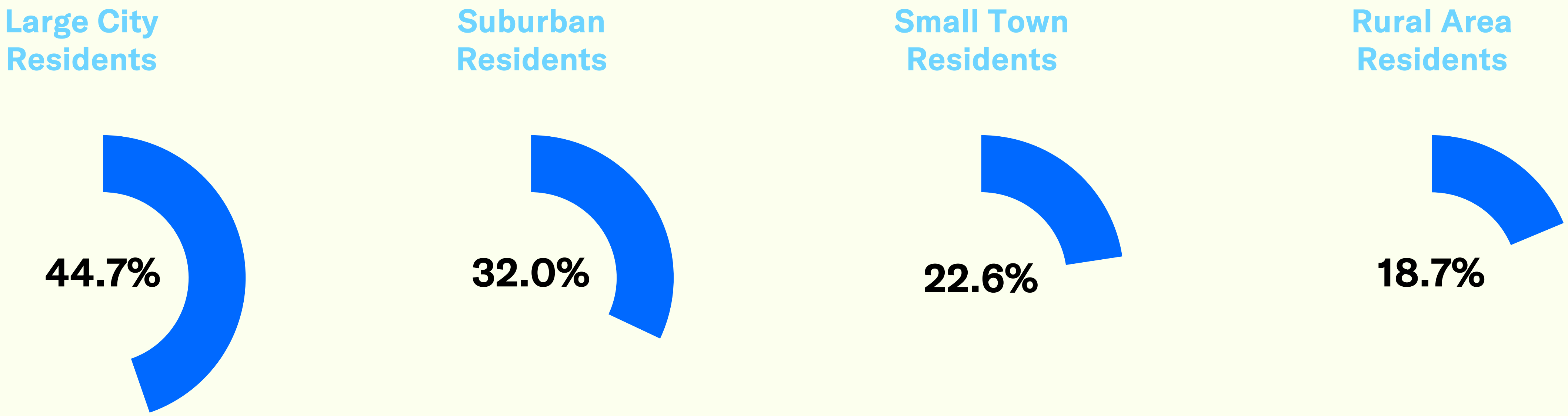
Top 2 Box Agreement by Generation



Large city residents are most likely to say they will travel abroad in the next year.

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

Top 2 Box Agreement by Type of Residence

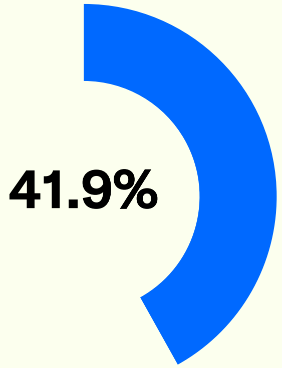


Having school-aged children is not a deterrent to traveling overseas – quite the opposite!

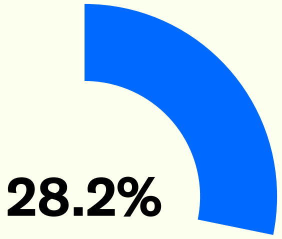
Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

Top 2 Box Agreement by Family Status

Parents of School-Aged Children

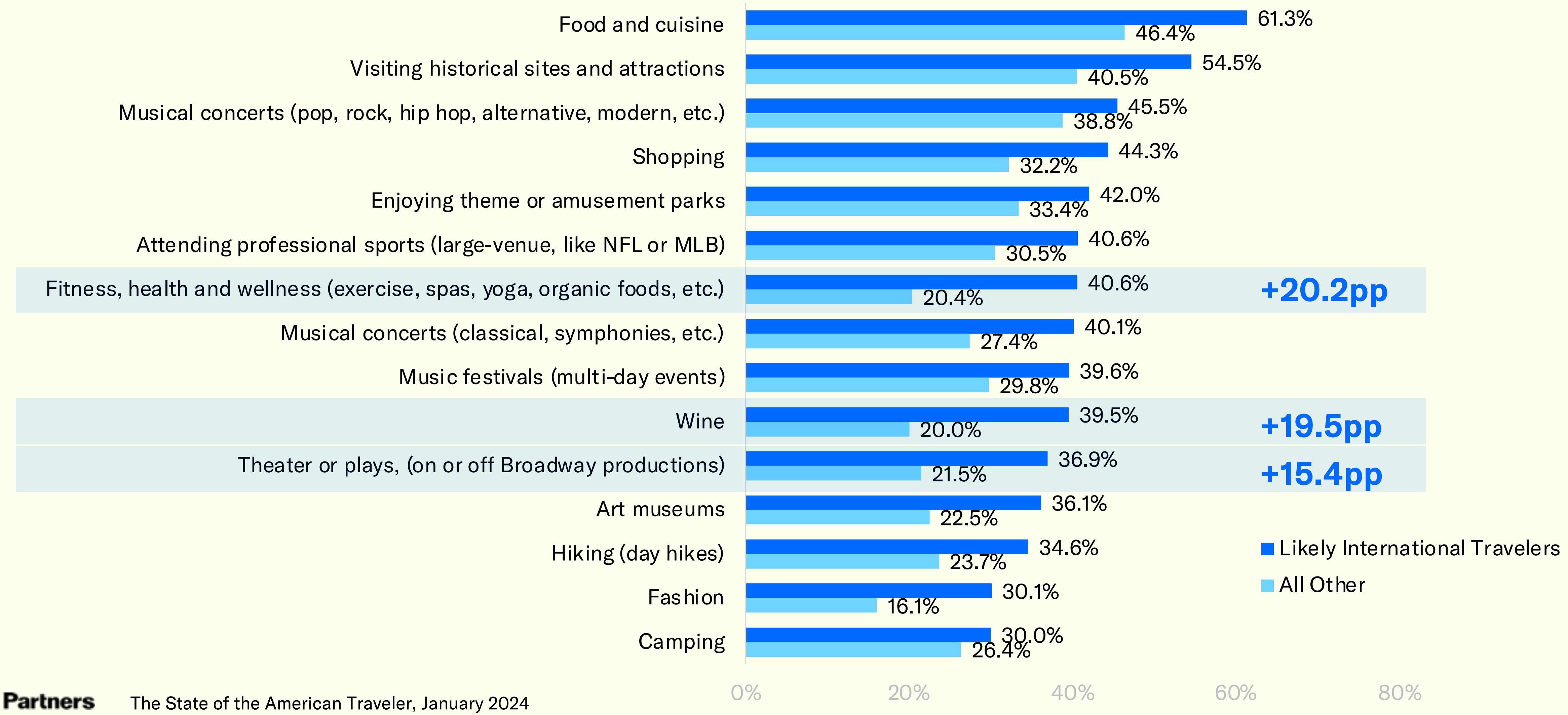


All Other



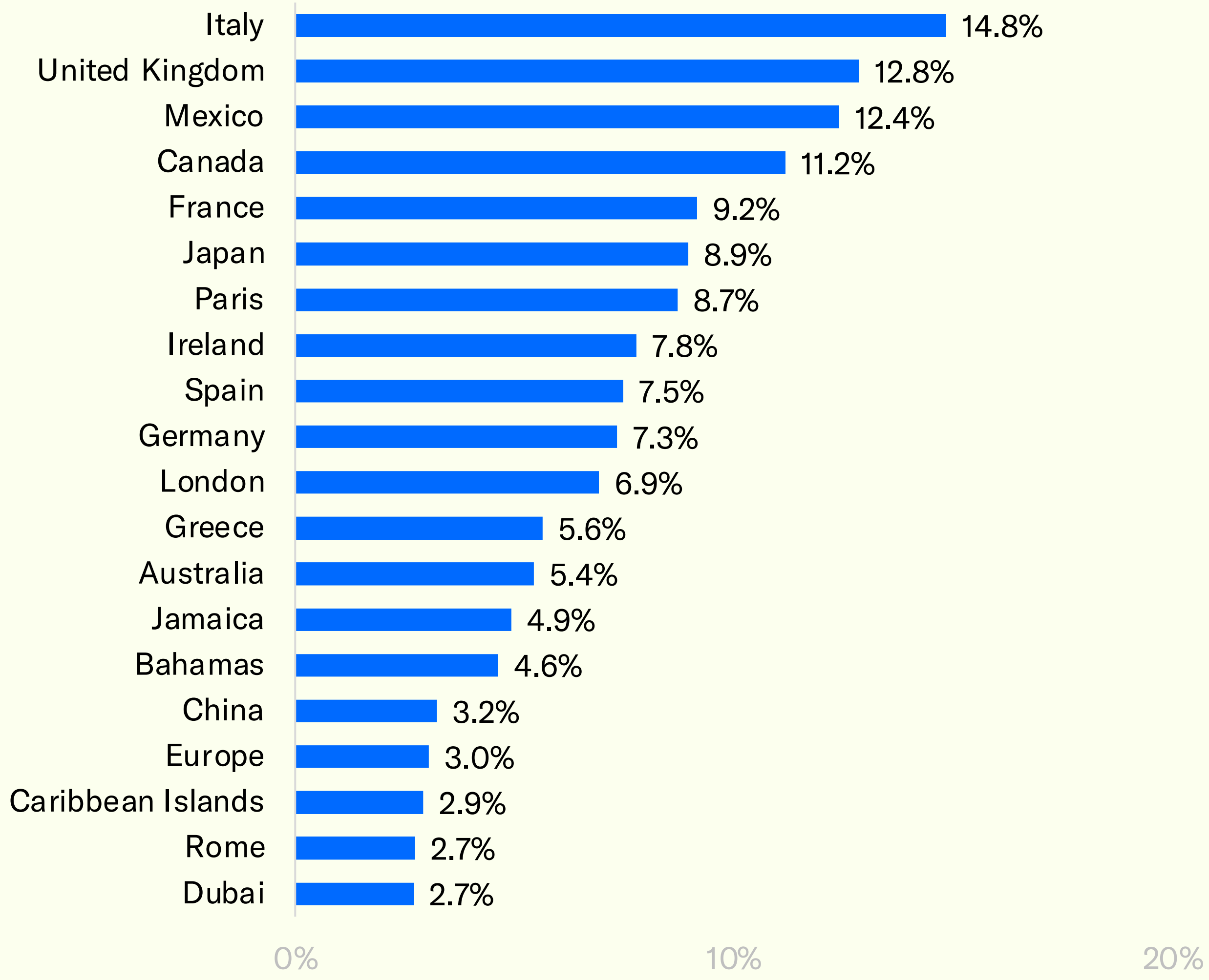
Likely international travelers are much more likely to be interested in wellness, wine, and theater.

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.



Italy is the most mentioned foreign destination that travelers want to visit in the next year.

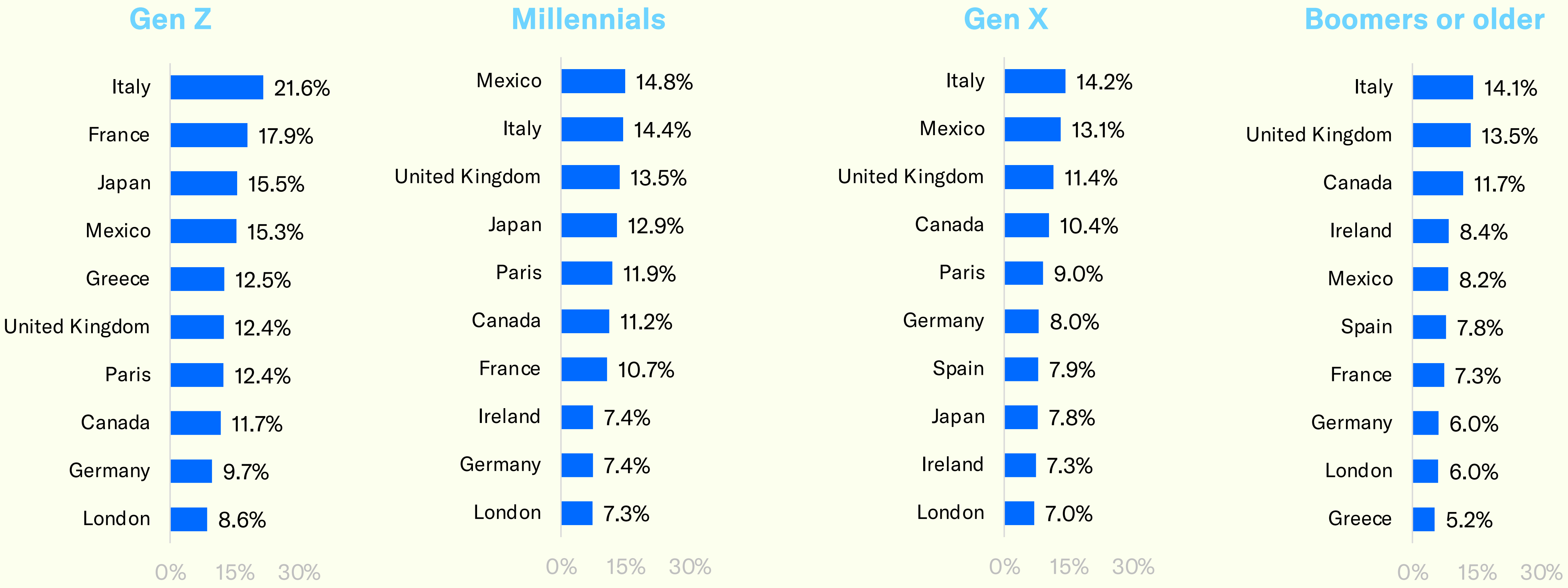
Question:
Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)



Italy dominates the international hotlist across all destinations, though Millennials were more likely to mention Mexico.

Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)

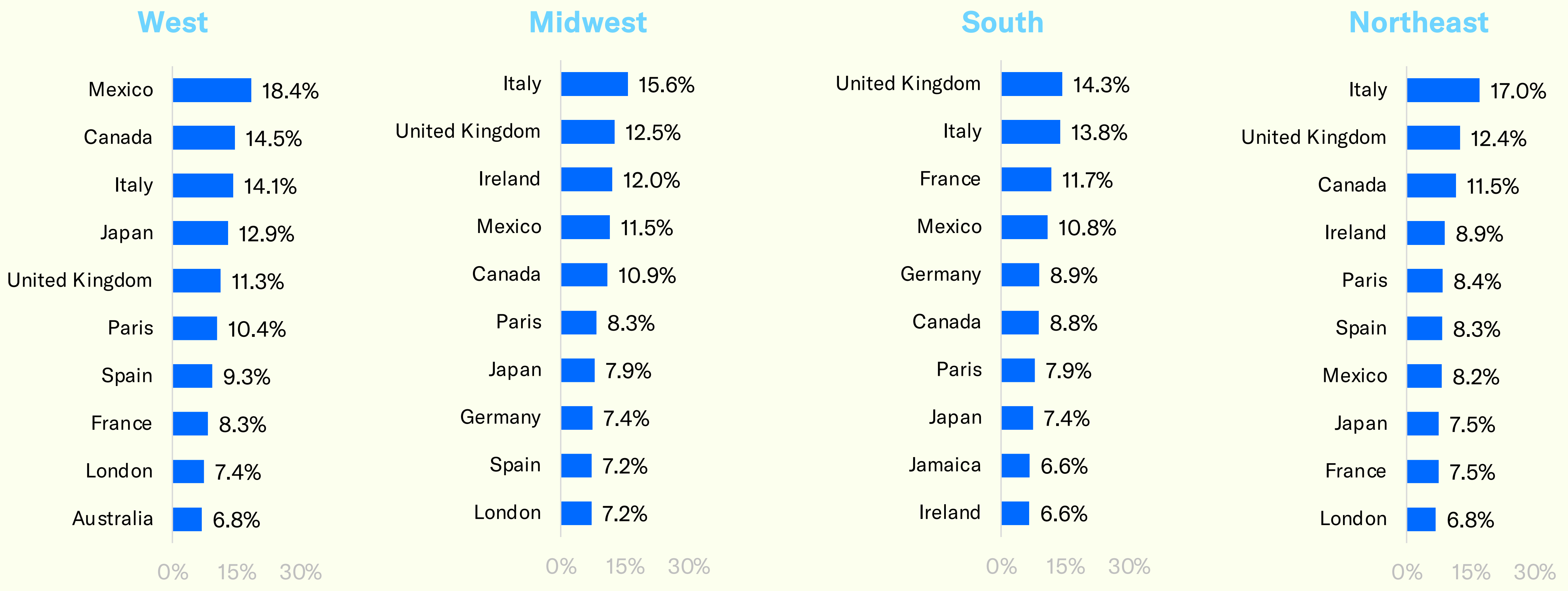
Hotlist by Generation



Italy and the UK top the international hot list for all regions except for the West, which cites Mexico and Canada first.

Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations outside the United States)

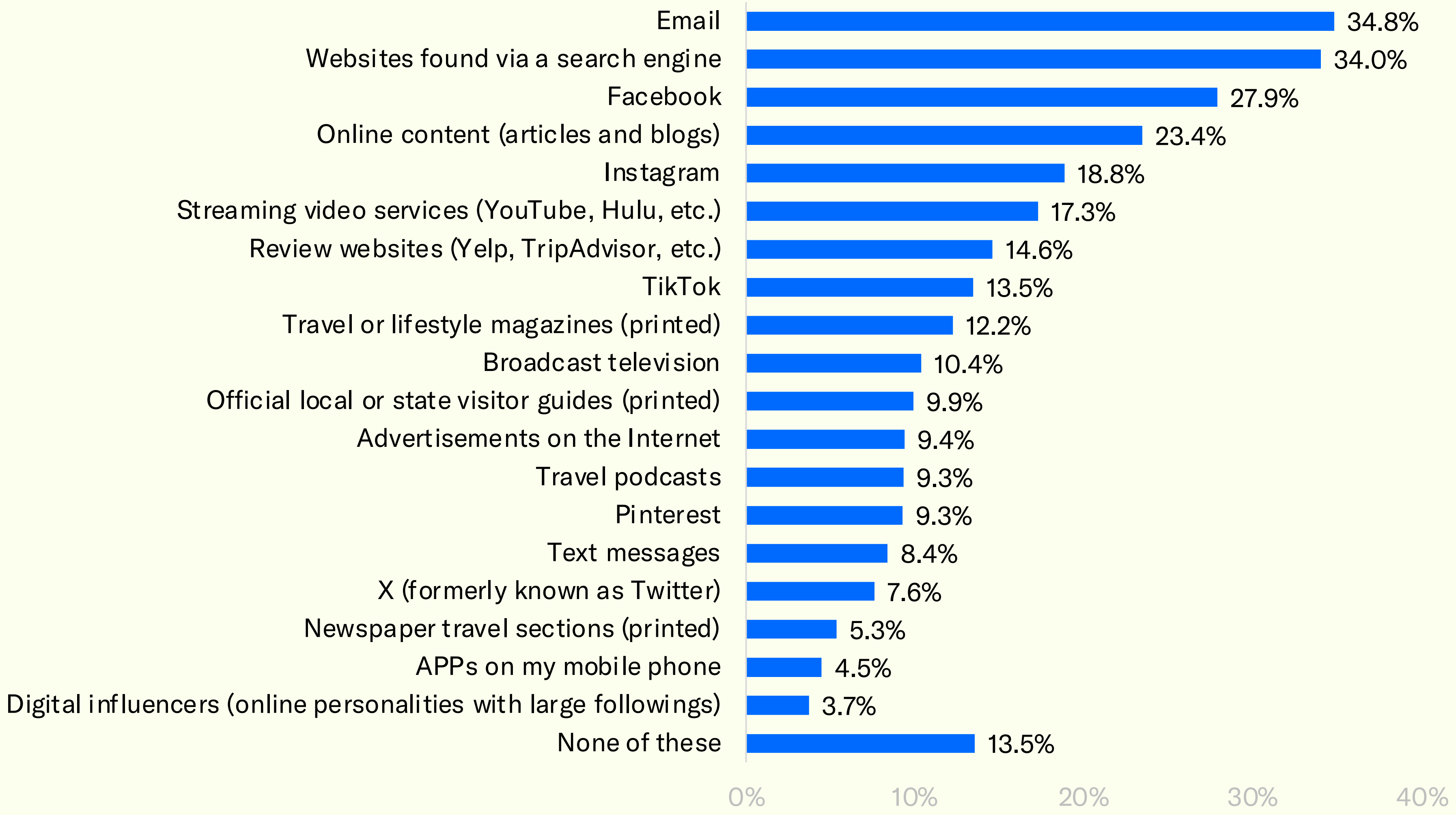
Hotlist by Region



Travel Planning

Across all travelers, email and websites found via search engine are the top travel marketing channels.

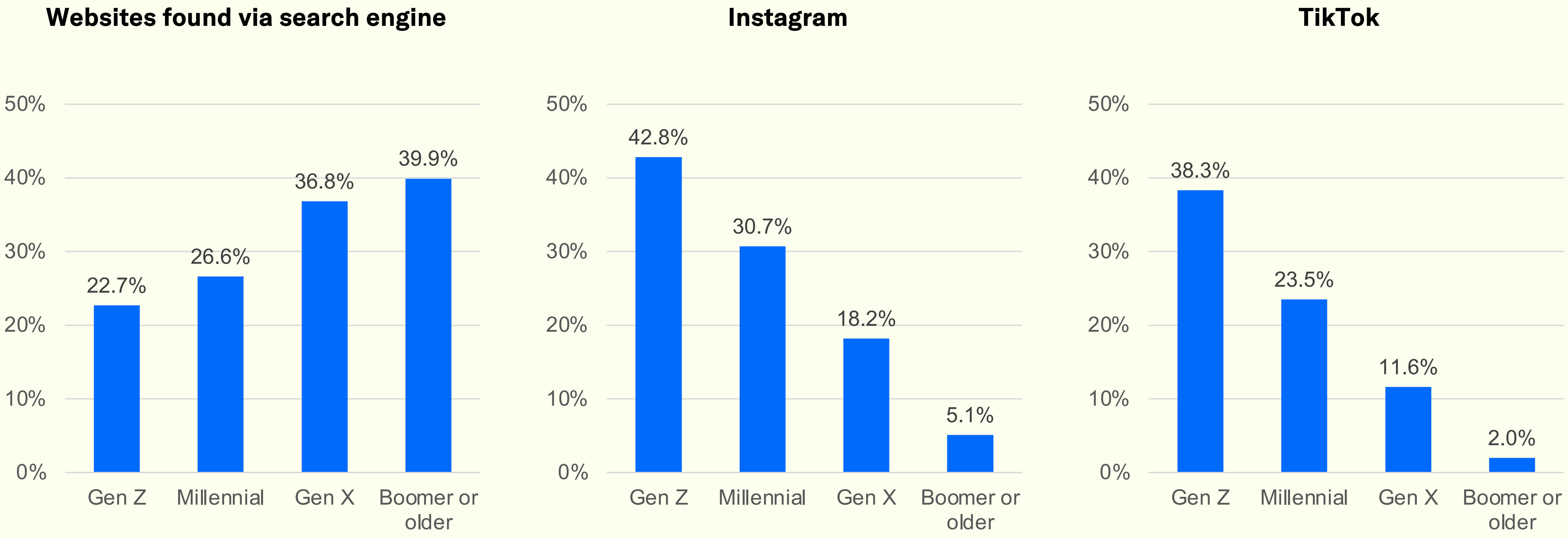
Question:
Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



Older generations are more reachable via websites, but Gen Z are much more likely to be receptive to marketing on Instagram and TikTok.

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)

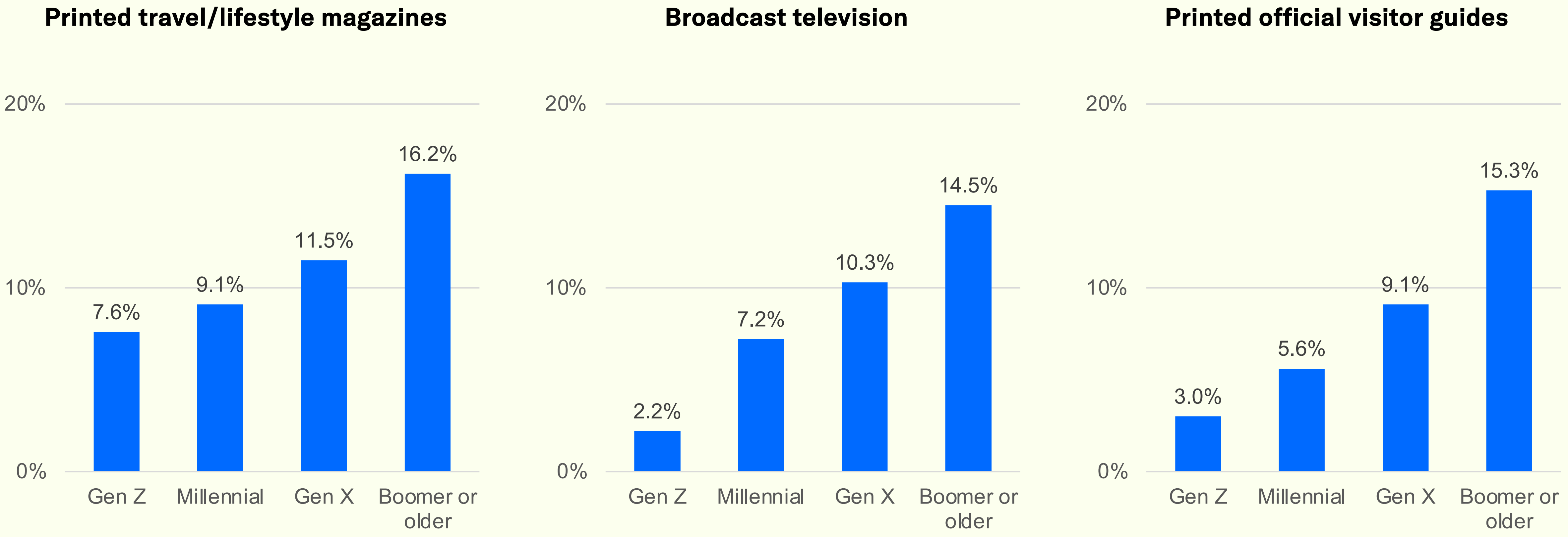
Key Digital Channels by Generation



For traditional channels, Boomers are most receptive to print and broadcast television compared to younger travelers.

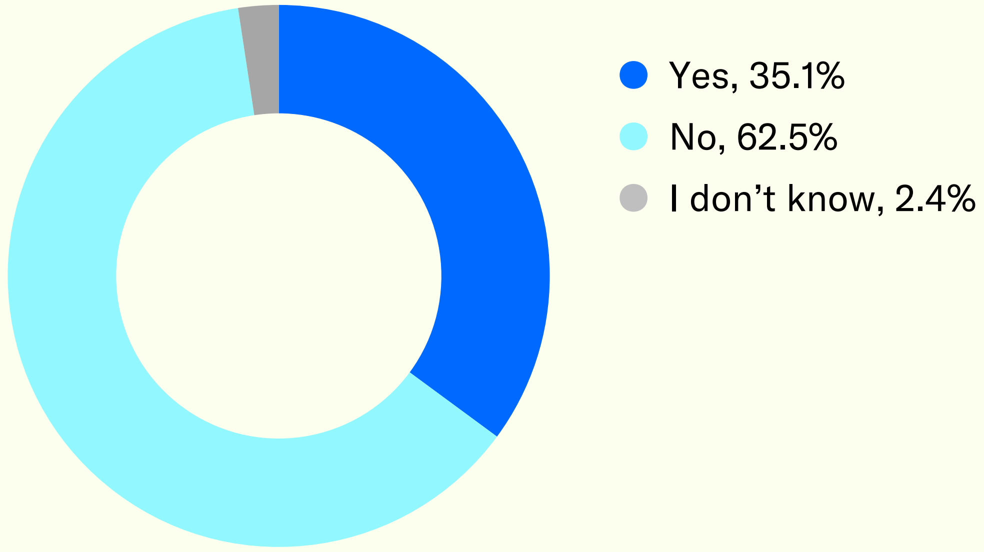
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

Key Traditional Channels by Generation



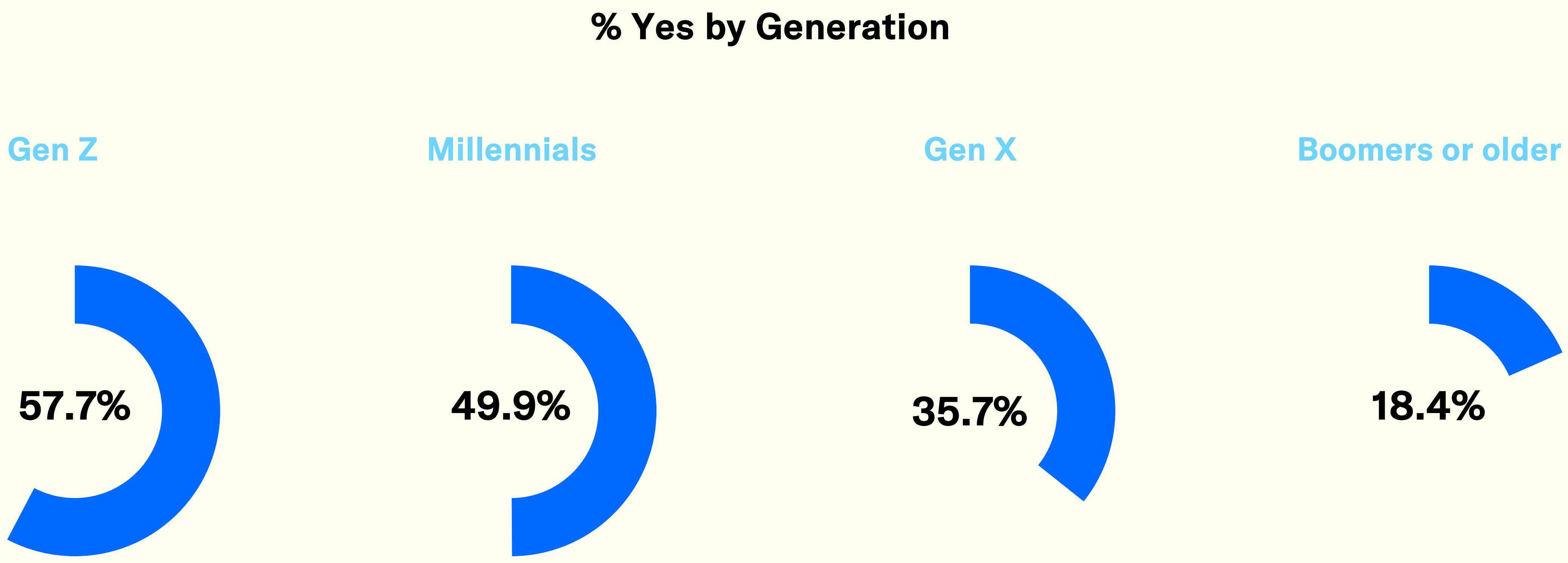
Just over one-third of all travelers have used online video to plan travel in the last year.

Question:
In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video, TikTok or Google Video) to plan any travel?



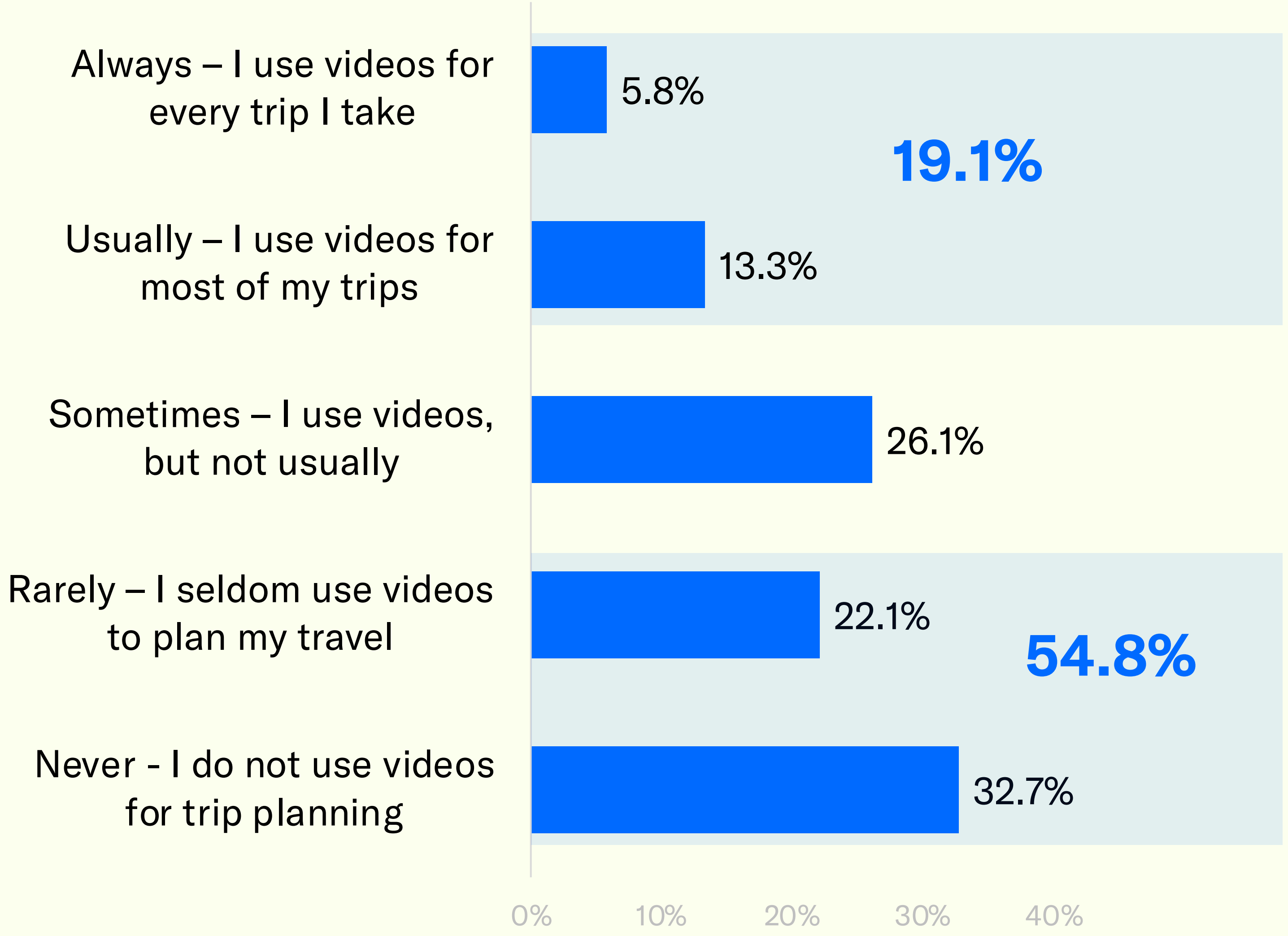
The majority of Gen Z and nearly half of Millennial travelers have used online video for travel planning in the past year.

Question: In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites (e.g. Youtube.com, AOL Video, TikTok or Google Video) to plan any travel?



About one in five travelers always or usually use online video to plan their travel.

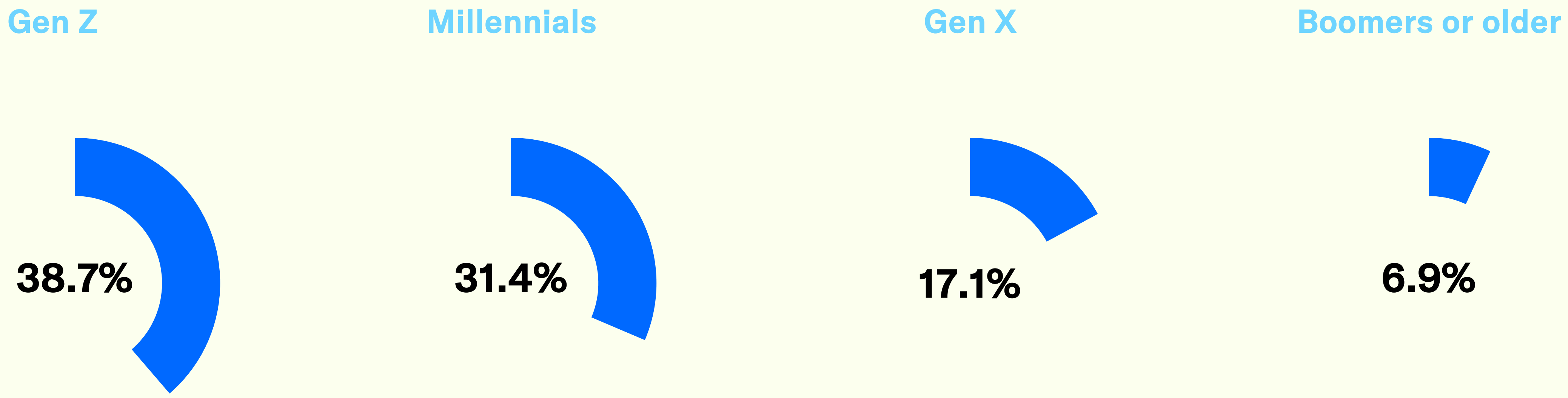
Question:
How often do you use ONLINE VIDEOS to plan your travel? (Select one)



Frequent online video usage for travel planning was highest among Gen Z, followed by Millennials.

Question: How often do you use ONLINE VIDEOS to plan your travel? (Select one)

% Top 2 Box (Always or Usually) by Generation



Travel Planning & Media Consumption Behaviors by Destination Type

City/Urban Destination Visitors

- Less likely to use digital influencers for trip planning
- More likely to be passionate about theater
- More likely to use reviews websites like Yelp for trip planning
- Rely less overall on media resources for trip planning
- Likely to have taken a trip specifically to attend a professional sports event
- Over half are Amazon Prime subscribers – likelier to be HBO Max subscribers
- Use major airline carriers and hotel brands

Small Town/Rural Visitors

- Well-reached by email campaigns and SEO
- Less likely to travel by air
- More likely to have recently stayed in a tribal casino hotel/resort
- Less likely to use credit card rewards/points for travel purchases and less likely to be members of travel loyalty programs
- Less likely to use ride-sharing services like Uber/Lyft
- Self-help podcast content
- AARP the Magazine
- Least likely to use DMO resources

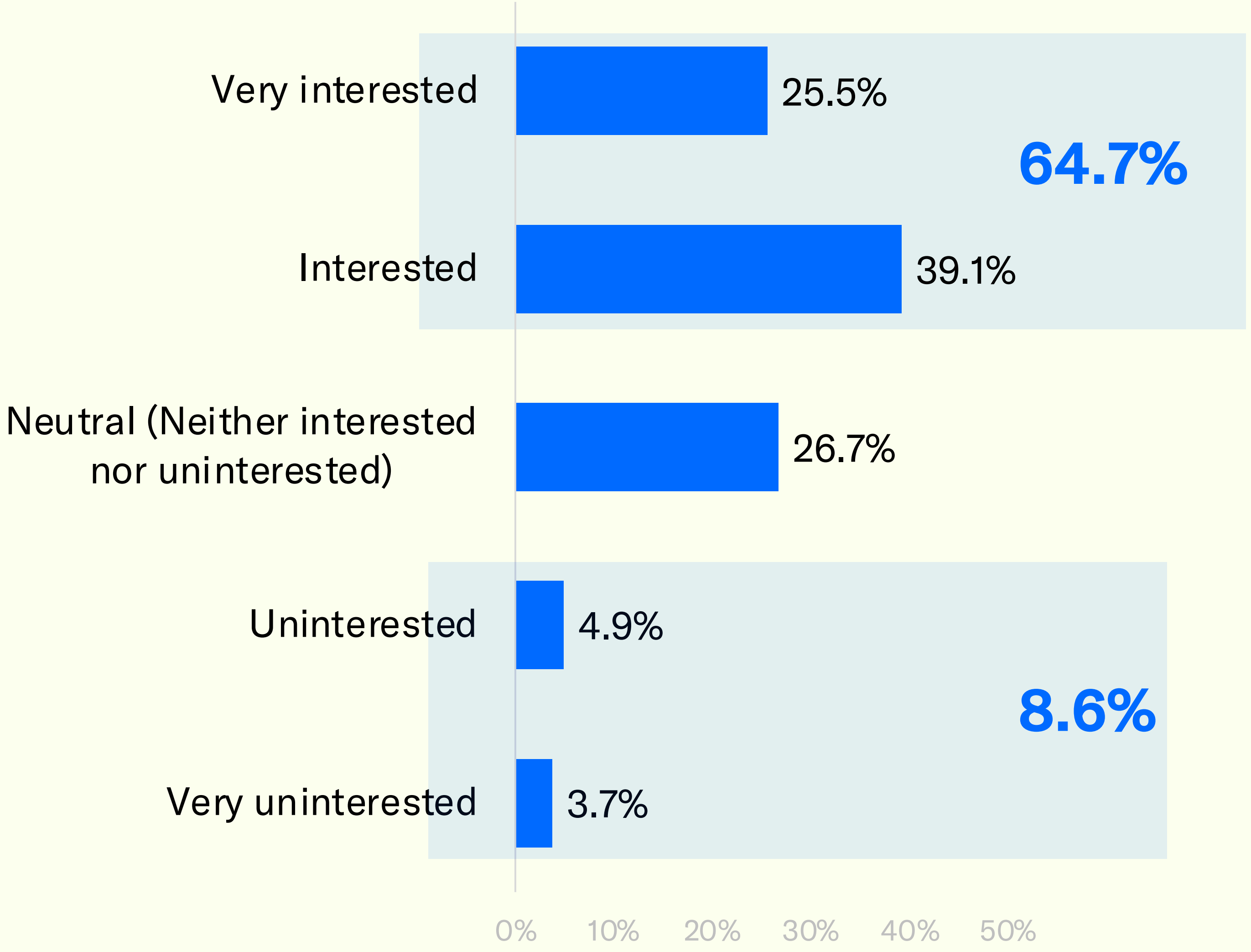
Mountain & National Park Destination Visitors

- More likely to use digital influencers
- More likely to frequently use online video for trip planning
- More passionate about food, historical sites, music concerts, photography and, of course, outdoor-type activities
- Well-reached by email and social campaigns
- Likelier to have used offline resources for travel planning, especially printed travel magazines
- Likelier to consume CNN and People Magazine; Health & Fitness podcasts; Netflix and Disney+
- Smaller/Regional air carriers

Signature Events

Two-thirds of all travelers are interested in traveling to experience a signature local event.

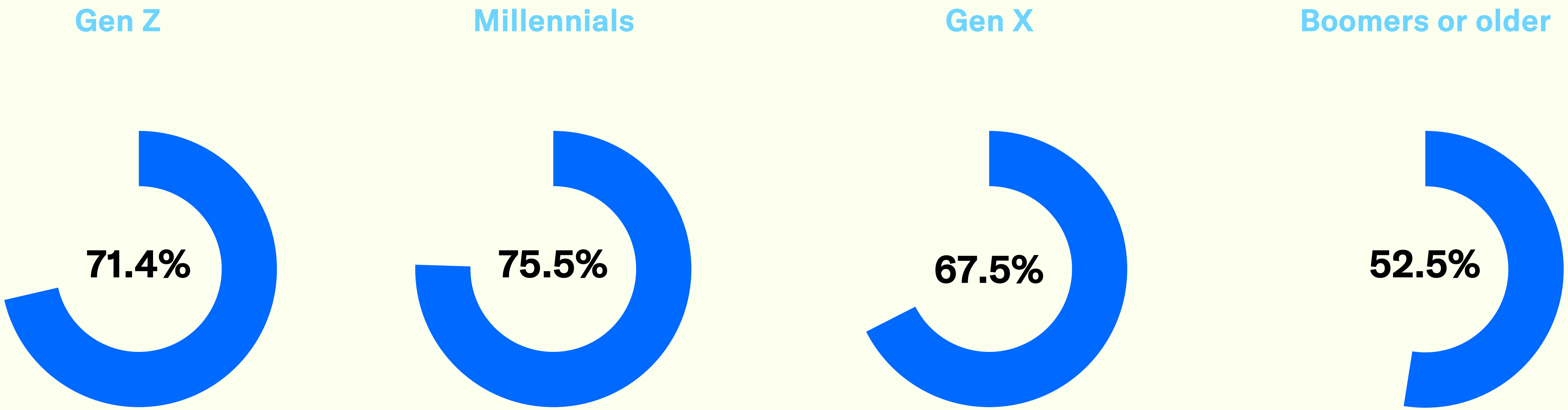
Question:
In general, how interested are you in traveling specifically to experience signature local events?



Interest is highest among Millennials, followed closely by Gen Z.

Question: In general, how interested are you in traveling specifically to experience signature local events?

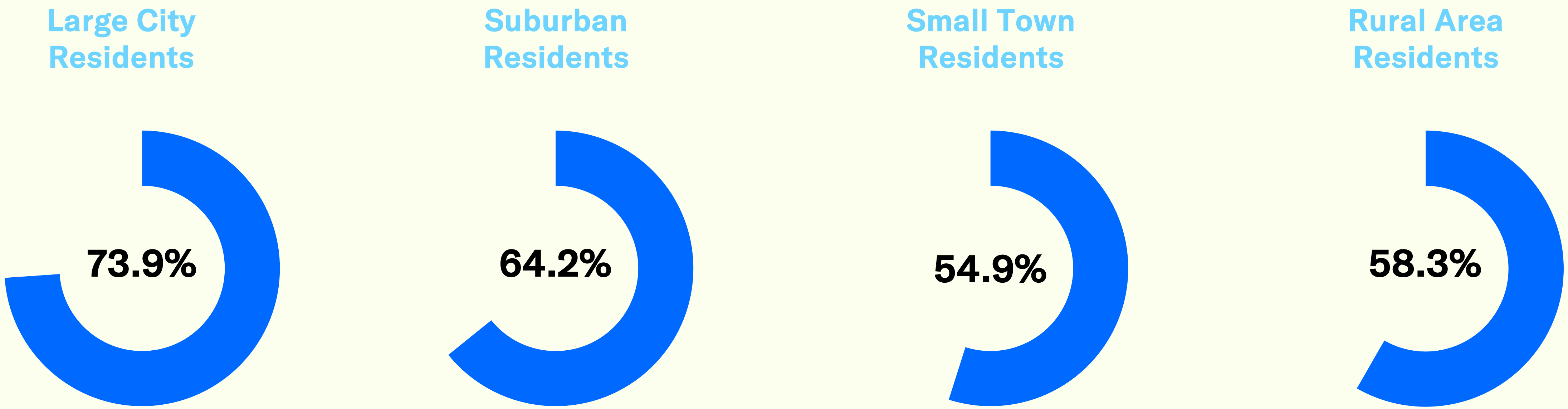
Top 2 Box Agreement by Generation



Urban residents are much more likely to say they will travel specifically to experience a signature local event.

Question: In general, how interested are you in traveling specifically to experience signature local events?

Top 2 Box Agreement by Type of Residence



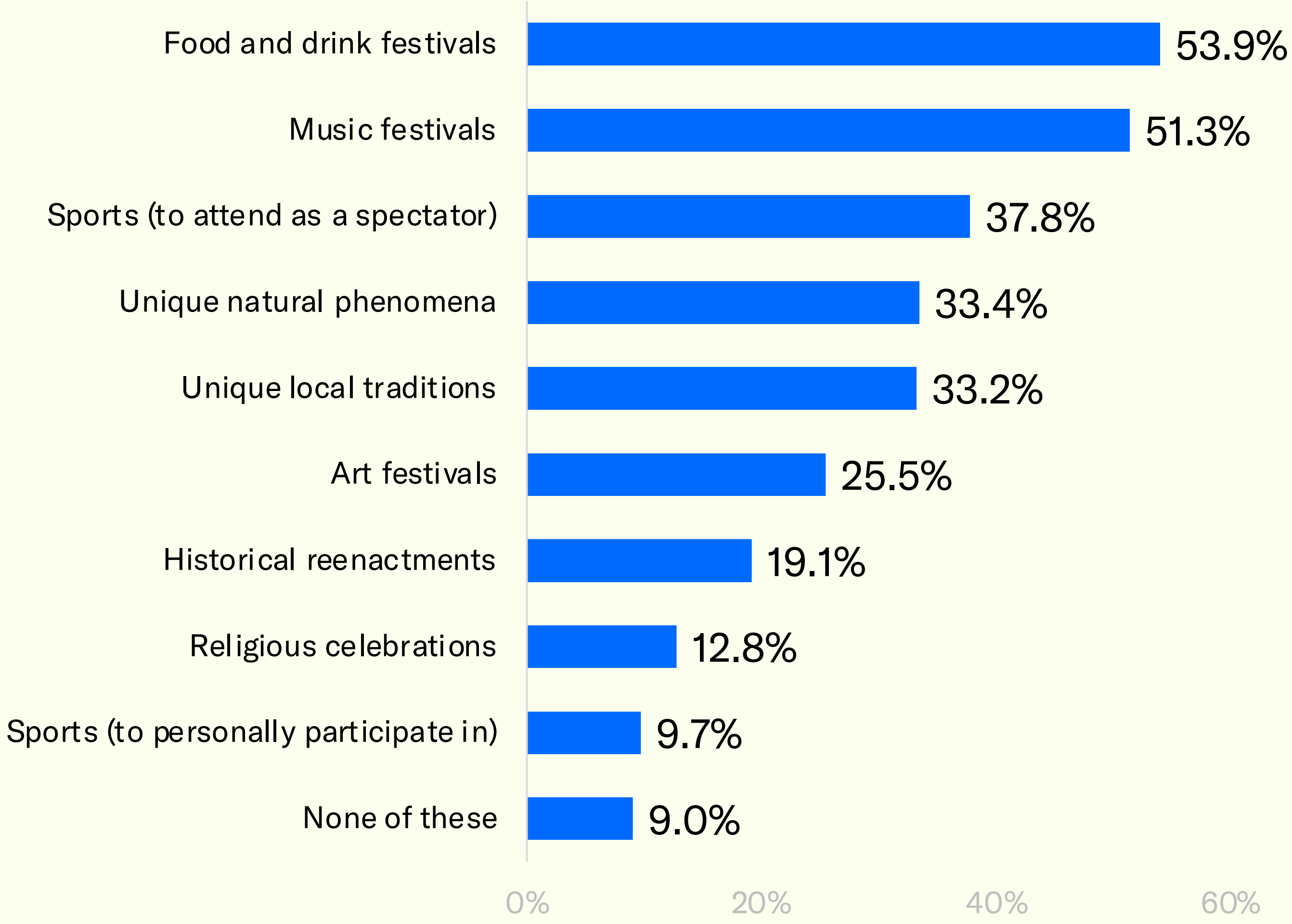
Parents of school-aged children are much more likely than other travelers to say they will travel specifically for a signature local event.

Question: In general, how interested are you in traveling specifically to experience signature local events?

Top 2 Box Agreement by Family Status

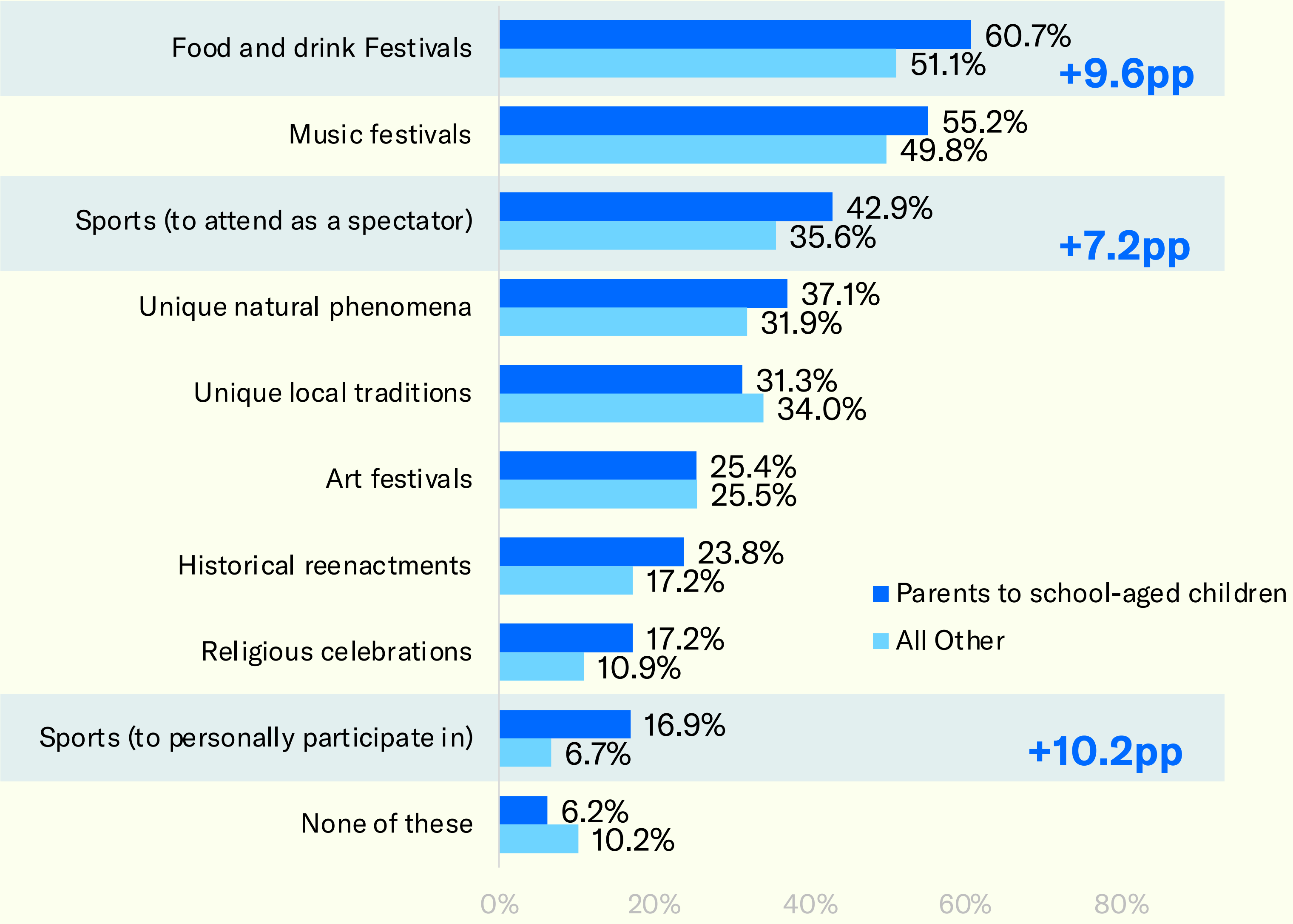
The majority of travelers said they would travel specifically for food and drink and/or music festivals.

Question:
Thinking about signature local events, which of these event types would you be interested in traveling specifically to attend? (Select all that apply)



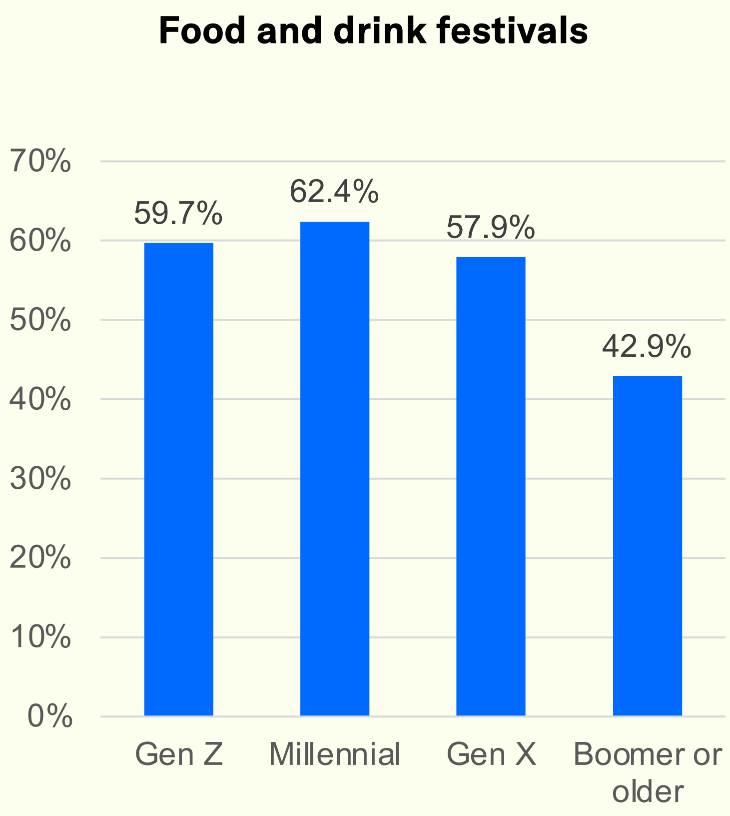
Parents of school-aged children are significantly more likely to be interested in traveling for food and drink festivals or sporting events

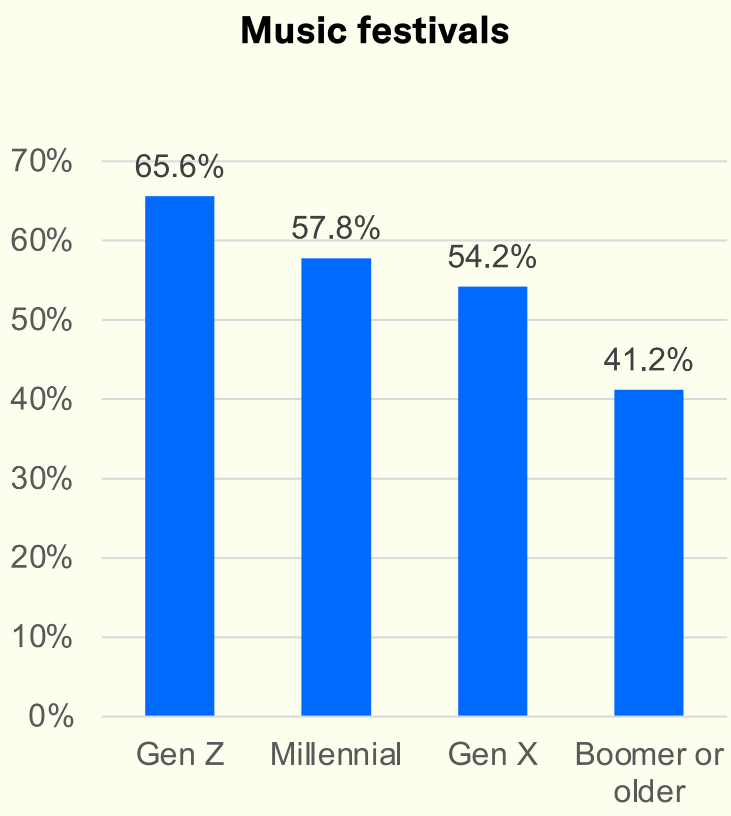
Question:
Thinking about signature local events, which of these event types would you be interested in traveling specifically to attend? (Select all that apply)

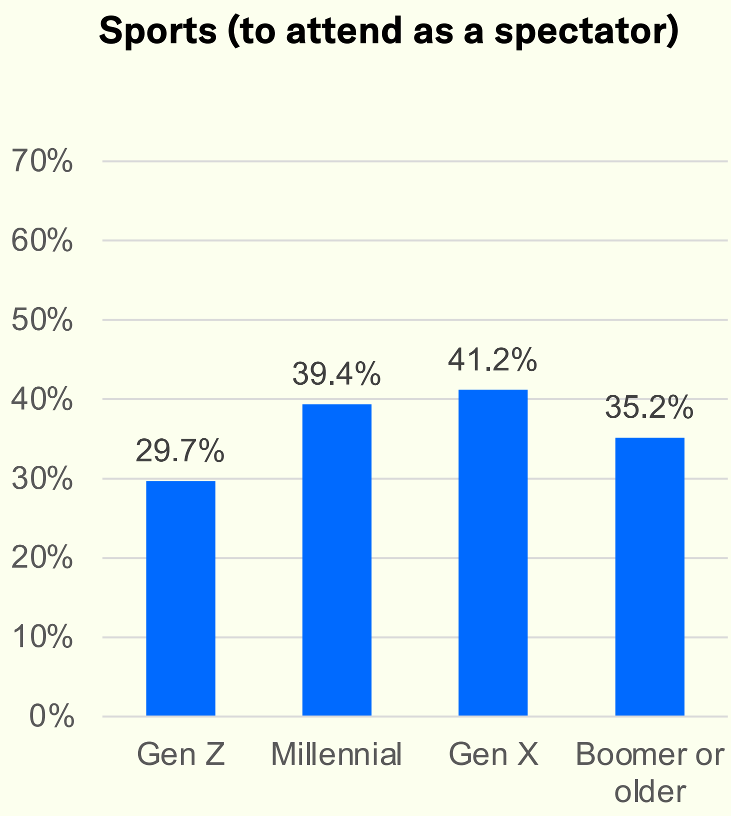


Gen Z travelers are more likely to be interested in music festivals, but less likely to be interested in attending a sporting event as a spectator.

Question: Thinking about signature local events, which of these event types would you be interested in traveling specifically to attend? (Select all that apply)







Thank You!

SIGNATURE LOCAL EVENTS

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SIX CHARACTERISTICS OF SUCCESSFUL

Signature Local Events

1. **Seasonal Superstar** (in off-season)
2. **Local Hero** (supportive host community)
3. **Visitor Draw**
4. **Authentic Story**
5. **Time Tested**
6. **Unlikely Winner**

» More: www.MilesPartnership.com/how-we-think

SIGNATURE LOCAL EVENTS

Hall of Fame

Gasparilla Pirate Festival

Hall of Fame

Albuquerque International Balloon Fiesta

Panelist Discussion

Additional Resources

Blogs.

- The Power & Potential of Signature Local Events

- U.S. Hall of Fame: Signature Events

MilesPartnership.com/how-we-think

UPCOMING QUARTERLY EDITIONS

POWERED BY THE STATE OF THE AMERICAN TRAVELER

Technology Trends:
June 18, 2024

Traveler Segments:
September 17, 2024

Stewardship & Sustainability:
November 5, 2024

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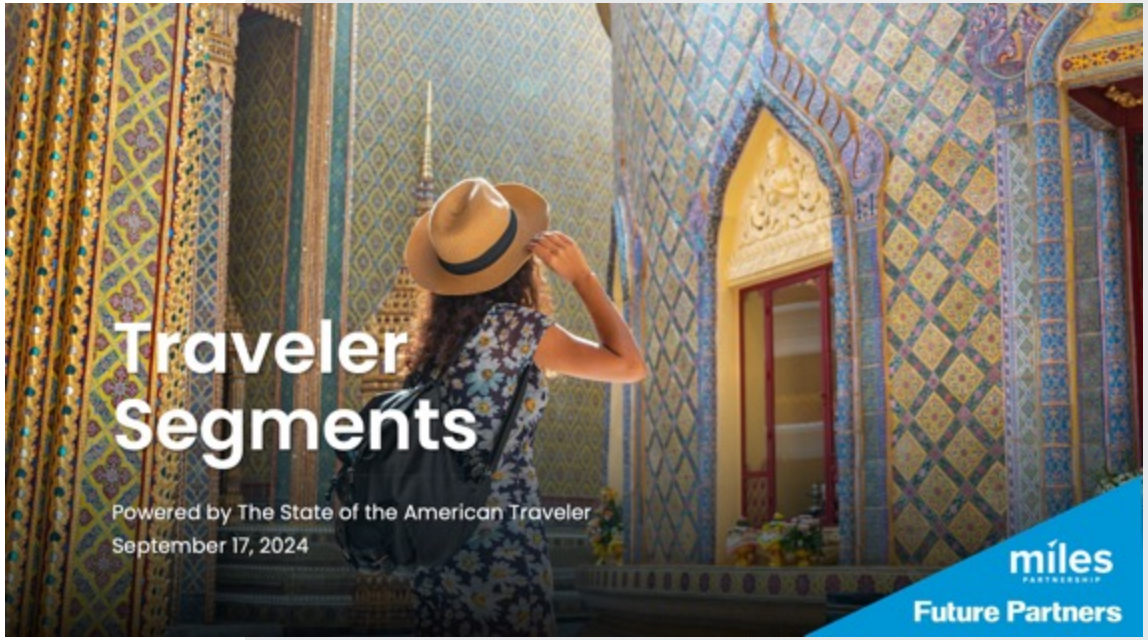

Q&A

Thank you!

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Future Partners