

THE STATE OF THE
AMERICAN TRAVELER:

Traveler Segments Edition 2023

RESEARCH SUMMARY

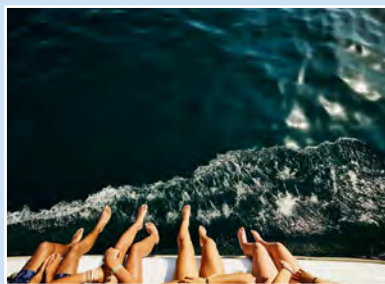


Executive Summary

Miles Partnership and Future Partners (formerly Destination Analysts) are delighted to share the most recent insights into U.S.-based travelers this month, as part of our ongoing partnership to provide the travel industry with the latest research into new travel trends and development.

This year's Traveler Segments Edition of The State of the American Traveler study explores travelers by three groupings: affluent, generations and foodies. What sets affluent travelers (those with an HHI of \$200,000+) apart from other travelers? What marketing channels best reach each of the different generational segments? And, what role does food play when it comes to travel? This edition takes a special look at travelers who identify as "foodies" to better understand how destinations can put their local food and drinks scene front and center to capture these audiences.

Our webinar featured two guest speakers: Eddie Kirsch, Digital Producer at Visit St. Pete/Clearwater, and Brian Horne, Vice President of 3 Daughters Brewing. Together, they discussed how they've successfully developed and marketed an innovative food scene and beer trail in St. Petersburg, catering to both visitors and locals.



RESEARCH BY

Future Partners

Future Partners

1304 Lombard St #8,
San Francisco, CA 94109
Phone: (415) 890-6087

ANALYSIS BY

miles
PARTNERSHIP

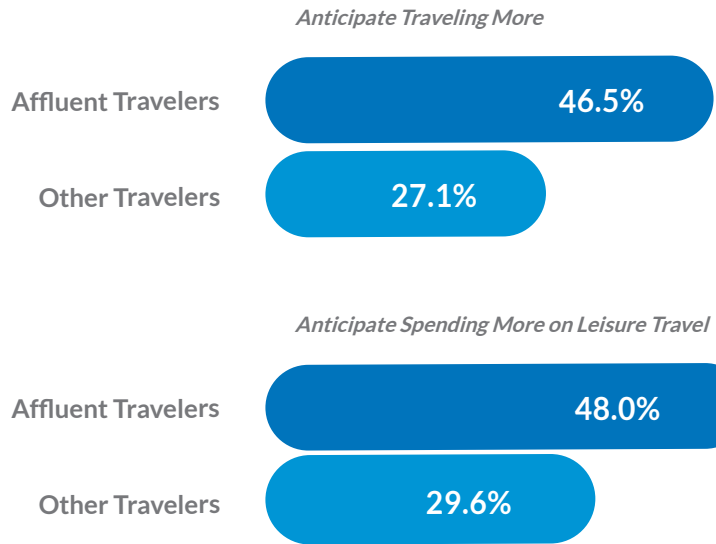
Miles Partnership

6751 Professional Parkway, Suite 200
Sarasota, FL, 34240
Phone: (941) 342-2300

AFFLUENT TRAVEL, BIG SPENDERS

Affluent travelers are spending more and traveling more in the next year. In fact, they anticipate spending nearly three times more on leisure travel than other travelers in the next 12 months (\$9,485 among affluent travelers versus \$3,389 among all other travelers).

Q In the past 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?

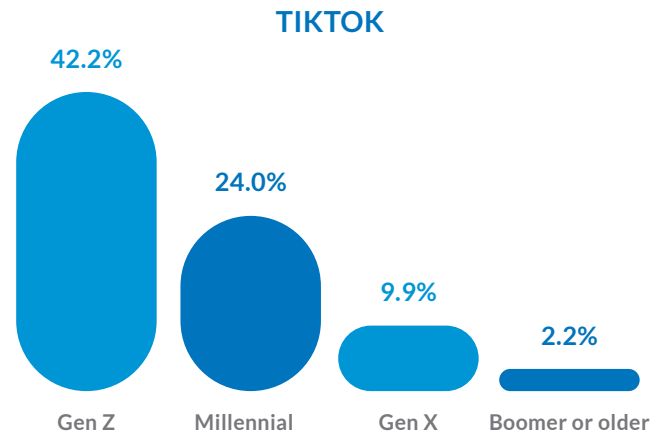


The State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

THE GENERATIONAL DIVIDE IN MARKETING

There are clear differentiators between the younger and older generations in terms of where they prefer to be marketed to. TikTok is the number one channel where Gen Z says they would be most receptive to travel marketing. On the other hand, Baby Boomers and older travelers are nearly twice as likely to say they would most prefer to learn about new destinations through websites they find through a search engine (43% of Boomer or older vs. 22.7% of Gen Z).

Q 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?

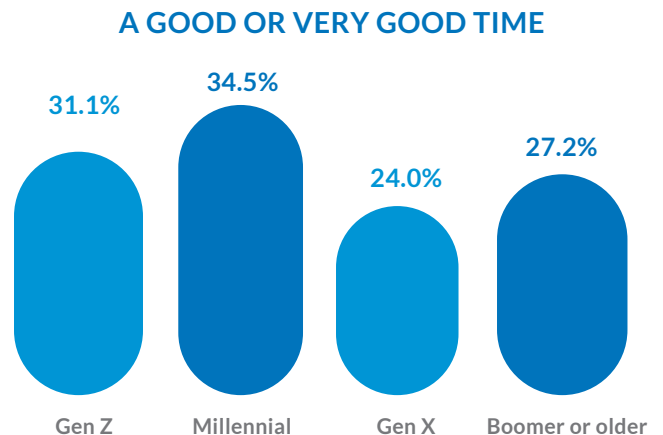


The State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

MORE MILLENNIALS SAY IT'S A GOOD TIME TO SPEND ON TRAVEL

Currently, younger generations anticipate financial improvement looking ahead. However, Baby Boomers have the biggest travel budgets (\$3,745) followed by Millennials (\$3,671).

Q 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 State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

ON SOCIAL, FOODIES BECOME DESTINATION AMBASSADORS

Foodie travelers are also much more likely to share their fun or interesting food experiences on social media. This means they could play a role in serving as organic brand ambassadors for a destination's food scene with the content they are creating and sharing with their followers.



When you have a fun or interesting food experience, how often do you post pictures of it to a social media website?

Foodie Travelers

49.8%

Other Travelers

19.0%

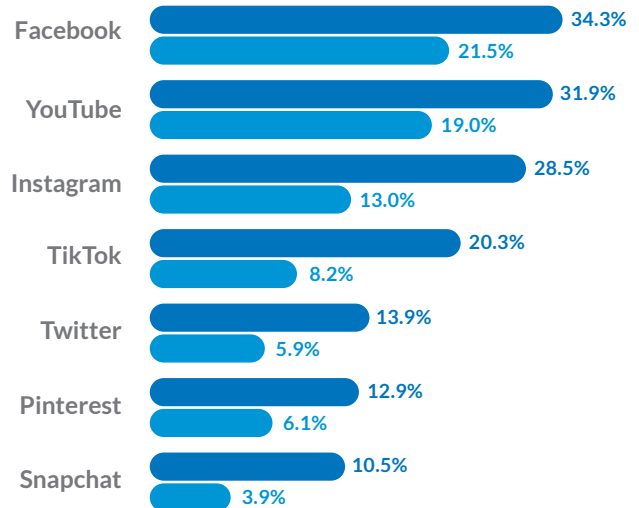
The State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

SOCIAL MEDIA IS A KEY RESOURCE FOR FOODIES

Given that foodies tend to skew younger, it may not be too surprising, then, that social media is a key media channel for this audience. They are significantly more inclined to utilize social media for planning their travels.



In the past 12 months, have you used any of the following social media platforms to prepare for or plan your travels?



● Foodie Travelers ● Other Travelers

The State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

A DESTINATION'S FOOD SCENE IS MOST IMPORTANT TO GEN Z FOODIES

Over half of American travelers are self-described foodies (52%), giving a robust sample of travelers to examine in this edition. Foodie travelers tend to skew younger, with 70.8% falling into the Gen Z and Millennial age groups. When selecting a destination to visit, 63.4% of Gen Z foodies say that the destination's food attributes or food scene is very or critically important.

63.4%

GEN Z FOODIES

59.9%

MILLENNIAL FOODIES

53.1%

GEN X FOODIES

39.7%

BOOMER OR OLDER FOODIES

The State of the American Traveler, Traveler Segments Edition, Future Partners, August 2023

5 Key Takeaways

- 1 72% of Americans expect to take at least one leisure trip in the next three months, with two-thirds saying they will include a trip to visit friends or relatives. While other travelers are more likely to daydream about leisure travel, affluent travelers (34.3%) spend more time booking the dream trip versus other travelers (15.2%).
- 2 Affluent travelers anticipate spending over \$9,000 on leisure travel in the next 12 months (three times more than all other travelers). These travelers are eco-conscious and hungry for outdoor travel experiences; staying in shape while traveling is also a high priority for them.
- 3 While email marketing still strongly appeals to older generations (and 42.8% of affluent travelers), Gen Z is less inclined to check their inboxes and is much more receptive to engaging with content on TikTok and Instagram. When asked about the use of online video in their travel planning, 52.7% of Gen Z agree or strongly agree that they have used online video to plan their trips in the last 12 months.
- 4 Foodie travelers are feeling social! 49.8% of travelers who identify as “foodies” are more likely to share their food experiences on social media than other travelers (19%). This excitement to share their experiences online can benefit destinations and amplify awareness of their food scene.
- 5 Overall, what are the top travel motivators among leisure travelers? Relaxation, fun, escapism and new experiences. Domestically, New York and Florida are the top two destinations for travelers this year, while internationally, Italy and the United Kingdom sit highest on travelers’ destination lists.

ANALYSIS BY

miles
PARTNERSHIP

RESEARCH BY

Future Partners

ADDITIONAL RESOURCES

[Webinar: The State of the American Traveler: Traveler Segments Edition](#)

[Quarterly Special Edition Webinars of The State of the American Traveler](#)

[Blog: Food Tourism Fundamentals, 7 Best Practices to Celebrate & Develop Your Destination's Cuisine](#)

