Traveler Segments 2025

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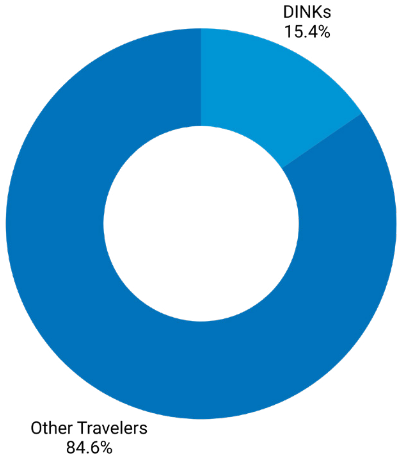
This year's Traveler Segments edition of The State of the American Traveler shines a spotlight on four key traveler segments, focusing on their approaches to leisure travel and how marketers can effectively reach these audiences.

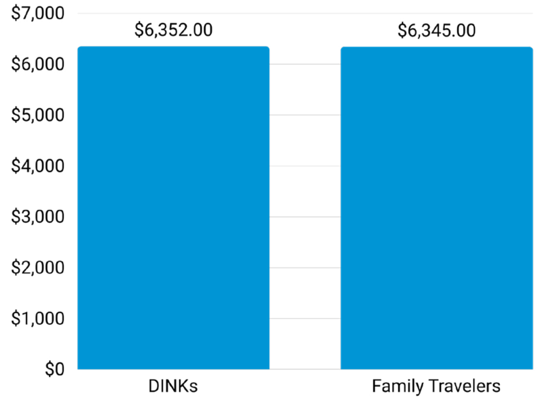
We took a closer look at DINKs (Dual Income, No Kids), Wellness Seekers, Gen Z and Sports and Music Event Travelers. We examined what travel behaviors and preferences are unique to these segments and how they engage with travel marketing in their trip planning markets. We're excited to present these latest insights as we continue in our shared mission to provide the industry with the most up-to-date trends and changes in travel and media.

DESPITE HIGHER INCOMES, DINKS SHOW LESS TRAVEL SPENDING MOMENTUM

Traveler Breakdown: DINKs vs Others



How much in total is the maximum you will spend on leisure travel during the next 12 months?

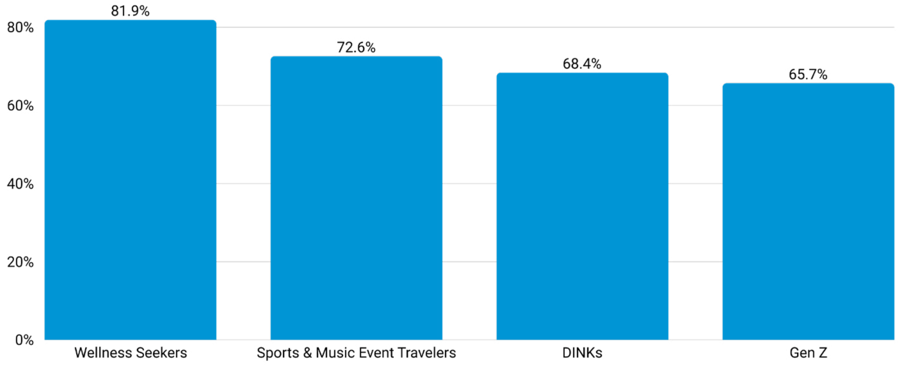


The bottom line: DINKs (dual income, no kids) are more likely than family travelers to be high earners, with 34.3% reporting household incomes of $150,000 or more. Yet, they're less likely to say they'll spend more on travel in the year ahead (27.5% vs. 36.8%). And while their total travel budgets are comparable to families, the per-person spend is likely higher, pointing to more discretionary, adult-focused travel. Still, as a smaller segment overall, DINKs may be more selective in when and how they choose to travel.

TRAVEL PLAYS A KEY ROLE IN WELLNESS SEEKERS' WELL BEING

In general, how important is it to you that your leisure trips support your physical, mental or spiritual well-being?

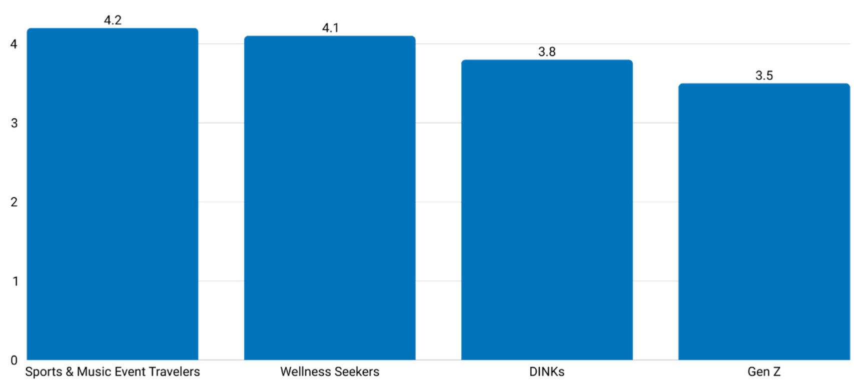
The bottom line: Wellness Seekers—travelers who are highly interested in fitness, health and wellness activities like exercise, spas, yoga and organic foods—are much more likely than other segments to say leisure travel is important to their physical, mental or spiritual well-being. In fact, more than eight-in-ten (81.9%) said that travel helps them maintain wellness, well ahead of Sports & Music Event Travelers (72.6%), DINKs (68.4%) and Gen Z (65.7%).



SPORTS & MUSIC EVENT TRAVELERS HAVE THE MOST TRIPS PLANNED IN THE NEXT YEAR

How many leisure trips (of 50 miles or more from your home) do you expect to take in the next 12 months?

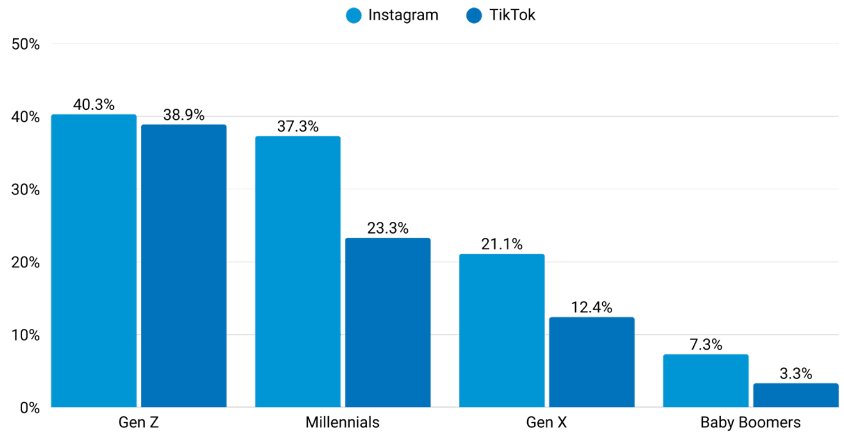
The bottom line: Of all the segments spotlighted in this report, Sports & Music Event Travelers are the most active. With an average of 4.2 leisure trips planned over the next year, they lead all other groups—just ahead of Wellness Seekers (4.1 trips) and notably higher than DINKs (3.8 trips) and Gen Z (3.5 trips). This data suggests that emphasizing sporting and music events will continue to be a winning strategy for DMOs.



TIKTOK AND INSTAGRAM ARE THE TOP CHANNELS TO MARKET TO GEN Z

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?

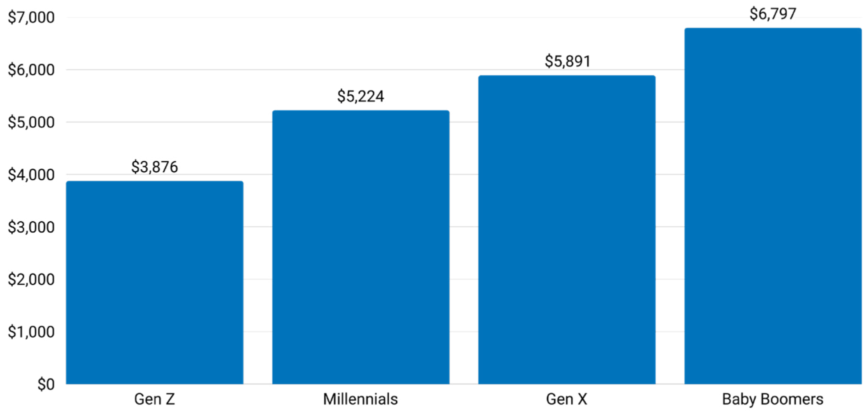
The bottom line: One of the biggest generational divides between Gen Z and their older counterparts when it comes to travel is how they consume media, especially on video-first platforms like Instagram and TikTok. Gen Z is far more receptive to using these platforms for travel inspiration and planning, with about four-in-ten Gen Z open to learning about new destinations on Instagram (40.3%) or TikTok (38.9%). In contrast, less than one-in-ten Boomers report being receptive to Instagram (7.3%) or TikTok (3.3%) as travel-planning tools.



OLDER GENERATIONS PLAN TO SPEND MORE ON TRAVEL IN THE YEAR AHEAD

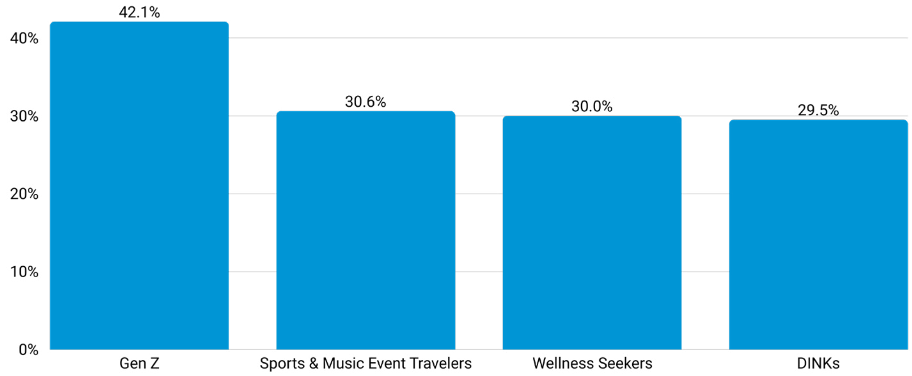
How much in total is the maximum you will spend on leisure travel during the next 12 months?

The bottom line: Older travelers continue to show the strongest travel spending outlook, with Boomers reporting the highest average budget at $6,797. Gen X follows at $5,891, with Millennials slightly behind at $5,224. Gen Z, by contrast, reports notably lower travel budgets—averaging just $3,876—suggesting continued financial constraints or shifting priorities among younger travelers.



PERCEIVED HIGH TRAVEL COSTS ARE MOST LIKELY TO DETER GEN Z TRAVELERS

Have concerns about the economy led you to change your thinking about travel or travel plans for the next six months?



The bottom line: Similar to planned trip number, the travel spending outlook is strongest among Sports & Music Event Travelers and Wellness Seekers out of the four segments. However, at least three-in-ten travelers across all segments reported high costs as a recent travel deterrent. Gen Z (42.1%) was most affected, citing affordability as a key reason they did not travel more in the past six months. The remaining segments were relatively aligned, with around 30% reporting cost as a limiting factor.

5 Essential Insights

1

Despite having more spending power and flexibility, DINKs are still more likely (21.2%) than families to cut back on travel in the next year. However, they're still spending nearly the same as families, highlighting that the value may actually lean in favor of DINKs.

2

Wellness Seekers view travel as a key part of their lifestyle; they see fitness, self-care and overall health options as must-haves when choosing a destination. Destinations that spotlight immersive, restorative experiences can attract these already-interested travelers.

3

Sports & Music Event Travelers continue to take advantage of the rise in immersive experiences. With more leisure trips planned over the next year (4.2) compared to the other three segments featured in this summary, this is a highly valuable audience for DMOs.

4

Continuing the trend seen in past years, Gen Z remains open to TikTok and Instagram for inspiration in their destination decision-making. The generational divide remains, as less than one in ten Baby Boomers reported being receptive to Instagram and TikTok. These platforms are crucial for destinations showcasing themselves to younger audiences.

5

While overall travel sentiment is strong among higher-spending segments (Sports & Music Event Travelers and Wellness Seekers), cost remains a limiting factor for many, particularly Gen Z. This suggests that value-based messaging may continue to resonate across segments, especially with younger travelers.

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Additional Resources:

Webinar: Traveler Segments 2025