

A scenic landscape of a fjord with jagged mountains and a couple standing on a rocky outcrop. The scene is captured during the golden hour, with warm light reflecting off the water and the sky. The couple is seen from behind, looking out over the vast expanse of the fjord and the towering, dark mountains in the distance. The foreground shows the rocky, moss-covered ledge they are standing on.

Destination Decisions

Powered by The State of the American Traveler

Tuesday, March 24, 2026

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Future Partners

With You Today



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Agenda

1. Current Travel Sentiment
2. Destination Decision Trends
 - a. Traveler Sentiment
 - b. Off-Season & Dispersal Travelers
 - c. Trip Motivators and Deterrents
 - d. Trip Planning
3. Panel Discussion: Off Season & Off-the-Beaten-Track Marketing
4. Q&A

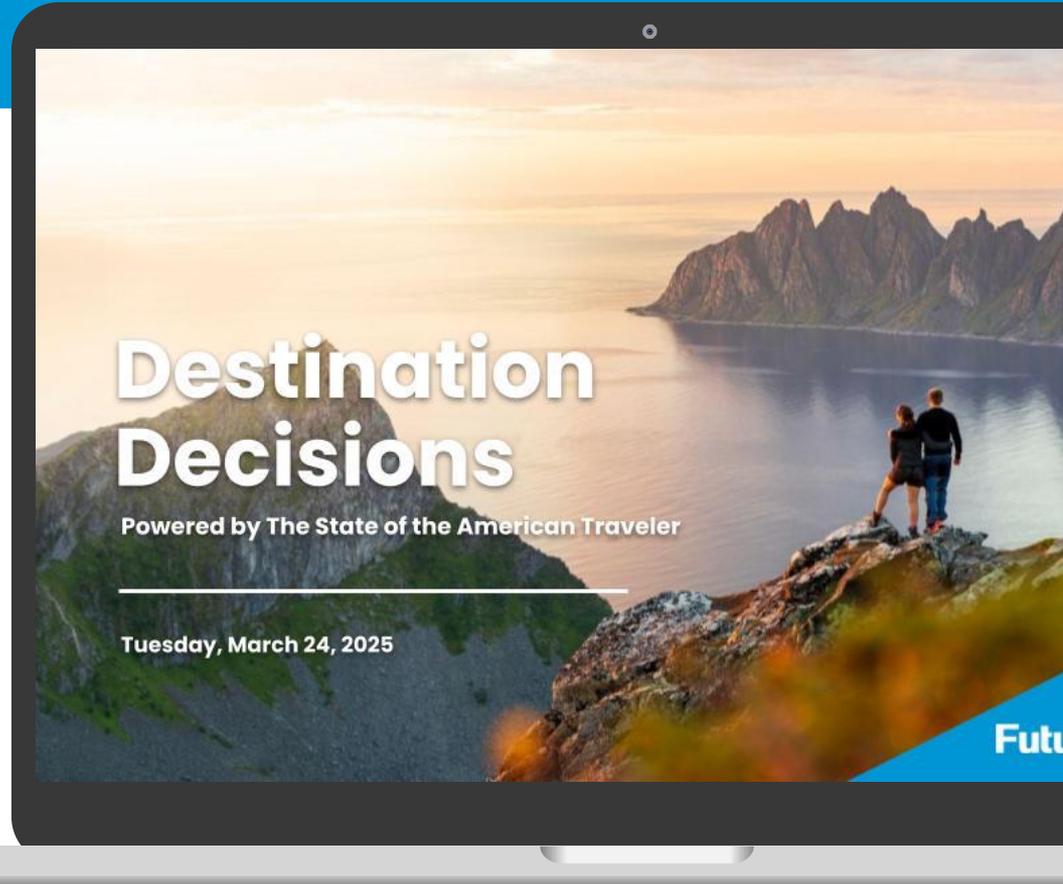


Research and Webinar Resources

Research, slides and other resources will be available at:

www.milespartnership.com/SAT

www.futurepartners.com



Research and Insights

Traveler Sentiment and Destination Decisions

March 2026

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*The State of the
American Traveler:
Destination Decisions*

Opportunity powered by Insight

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Shaping strategies for travel brands and tourism
leaders that capture *hearts*, minds and market
share

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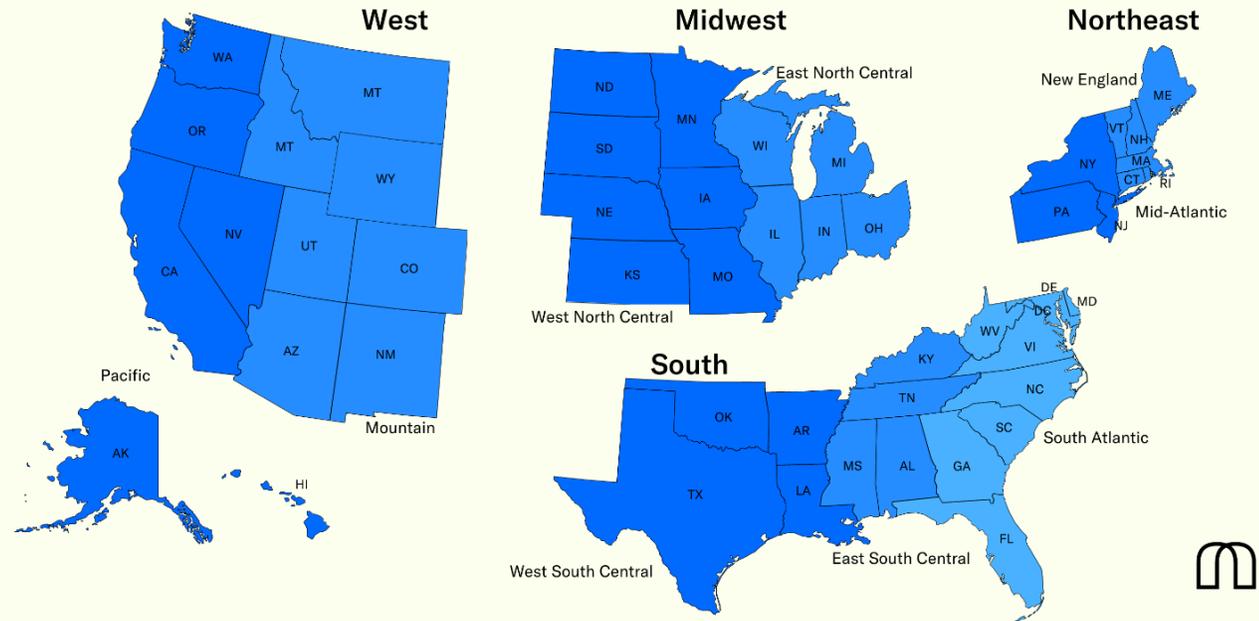
Bringing the future of travel
within reach

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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
- 4,000+ fully completed surveys collected each wave.
- Data included in this presentation was collected over two waves in [January 16-25, 2026](#), and [February 17-March 3, 2026](#)
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region

United States Census Regions and Divisions



February 22



Jalisco, Mexico

Security concerns in western Mexico

February 28



Iran & Middle East

Escalating conflict in the Middle East



TSA staff shortages lead to hourslong security lines for travelers at some airports



***Tune into our
Monthly Webinar
Series for the
Latest on American
Travel Sentiment
& Behaviors***



Livestream Calendar

Today's Agenda

- Current Travel Sentiment Framing Destination Decisions
- Trip Motivators and Destination Drivers
- Where Destination Decisions Get Influenced: Media and Travel Tools
- Profile of Off-Season and Dispersal Travelers

A Look Back:

2016

Destinations Poised for Success in 2016

American destinations can expect high levels of excitement around leisure travel segments this year. In our latest Destinations Edition of this study, 4.2 percent of travelers said that they will increase the number of leisure trips taken this year, up from 31.1 percent one year earlier. 34.4 percent so now plan to devote more money to travel. Demand for leisure travel is strong across regions, destination types and income brackets, but is most pronounced amongst younger, urban residents.

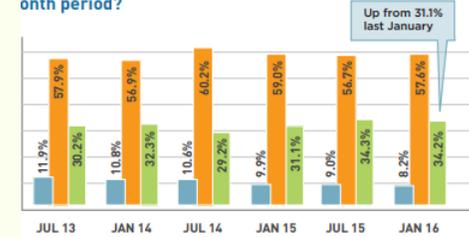
Sponsored By **miles**
marketing destinations

SNAP SHOT

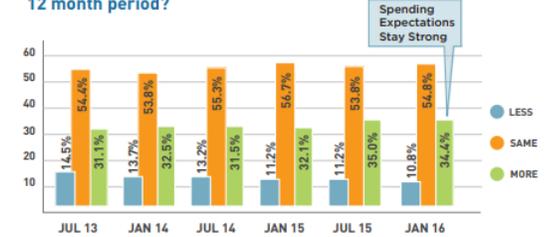
Americans planning to **increase** leisure travel **spending** in the next 12 months



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



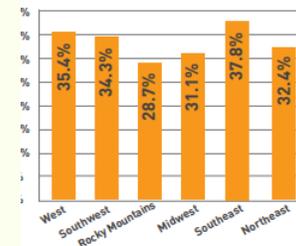
Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?



Who Will Travel More in 2016? Leisure travel expectations from varied perspectives

Region of Residence

(% region planning to travel more)



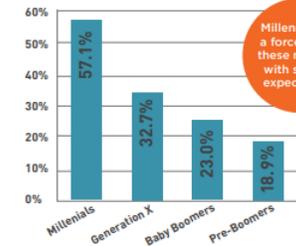
Annual Household Income

(% income planning to travel more)



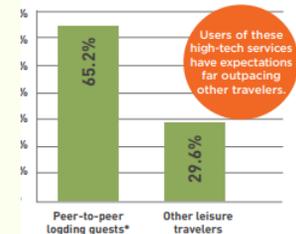
Generations

(% age planning to travel more)



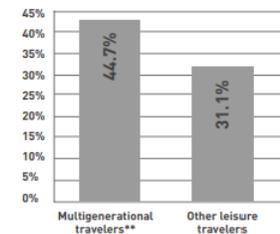
Peer-to-Peer Lodging Guests

(% planning to travel more, comparison)



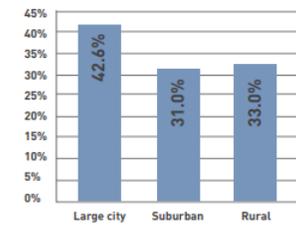
Multi-Generational Travelers

(% planning to travel more, comparison)

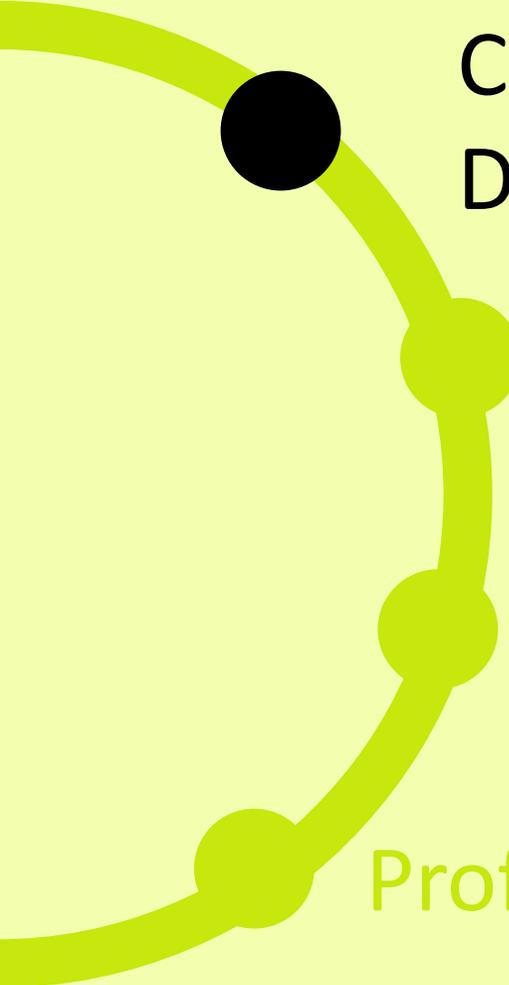


Place of Residence

(% planning to travel more, comparison)



Today's Agenda



Current Travel Sentiment Framing Destination
Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced:
Media and Travel Tools

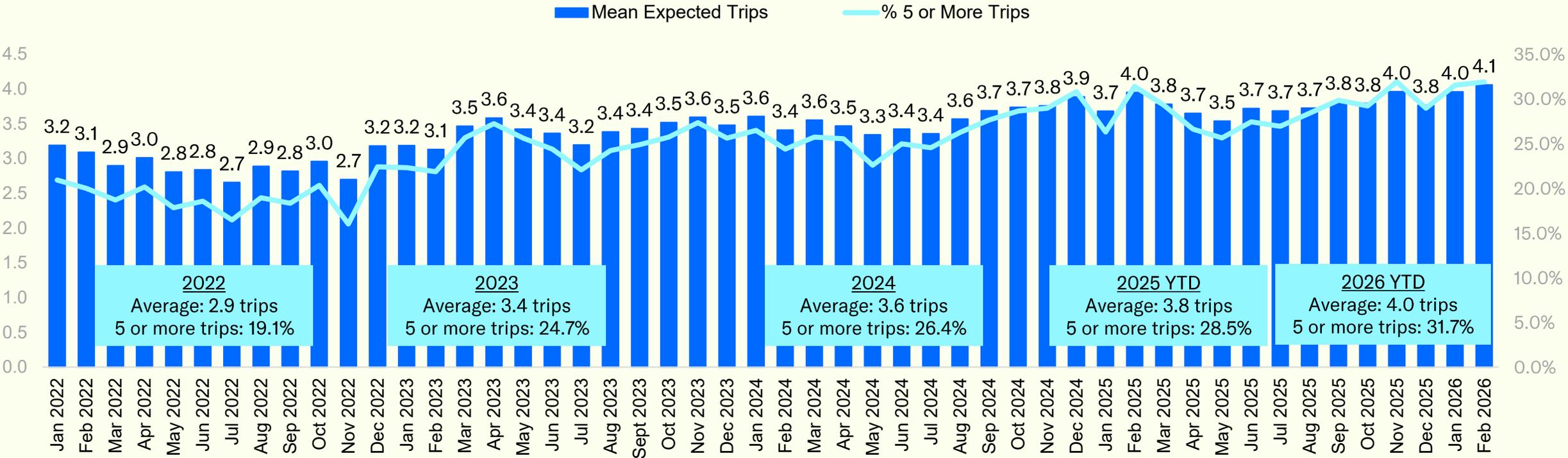
Profile of Off-Season and Dispersal Travelers

In the post-pandemic years, travel has maintained its status as a prioritized experience, with the average number of trips planned steadily increasing each year since 2022. Strong travel demand offers destinations great opportunity.

Since the Pandemic, Leisure Trip Volume Has Continued to Increase Each Year

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT 12 MONTHS?

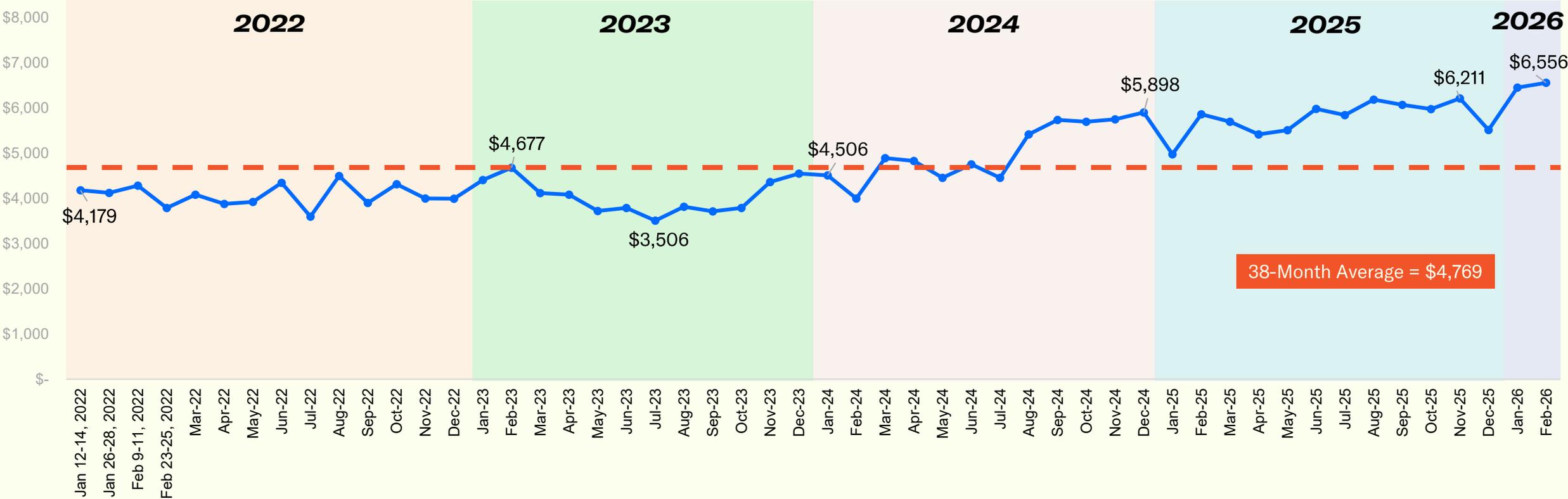
Expected Trip Frequency – Next 12 Months



Annual Travel Budgets Have Also Risen Consistently

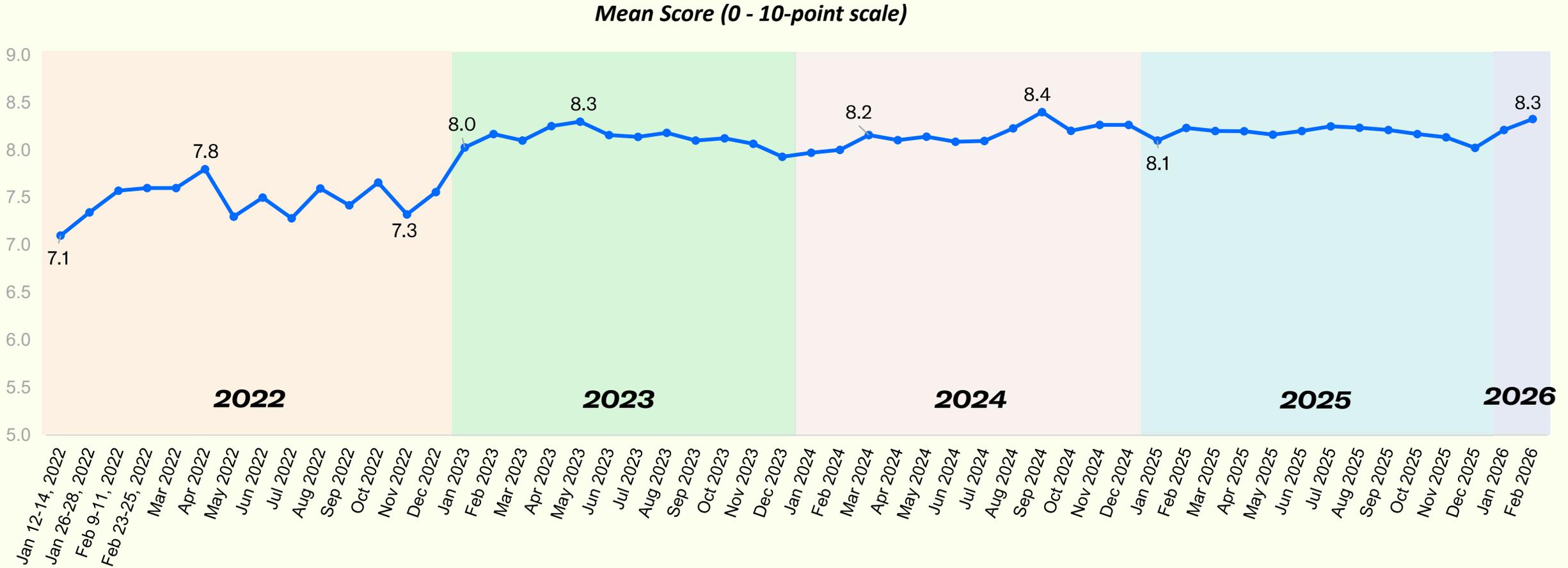
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months): _____

Average Maximum Annual Travel Budget



Furthermore, Excitement for Travel Remains High

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)

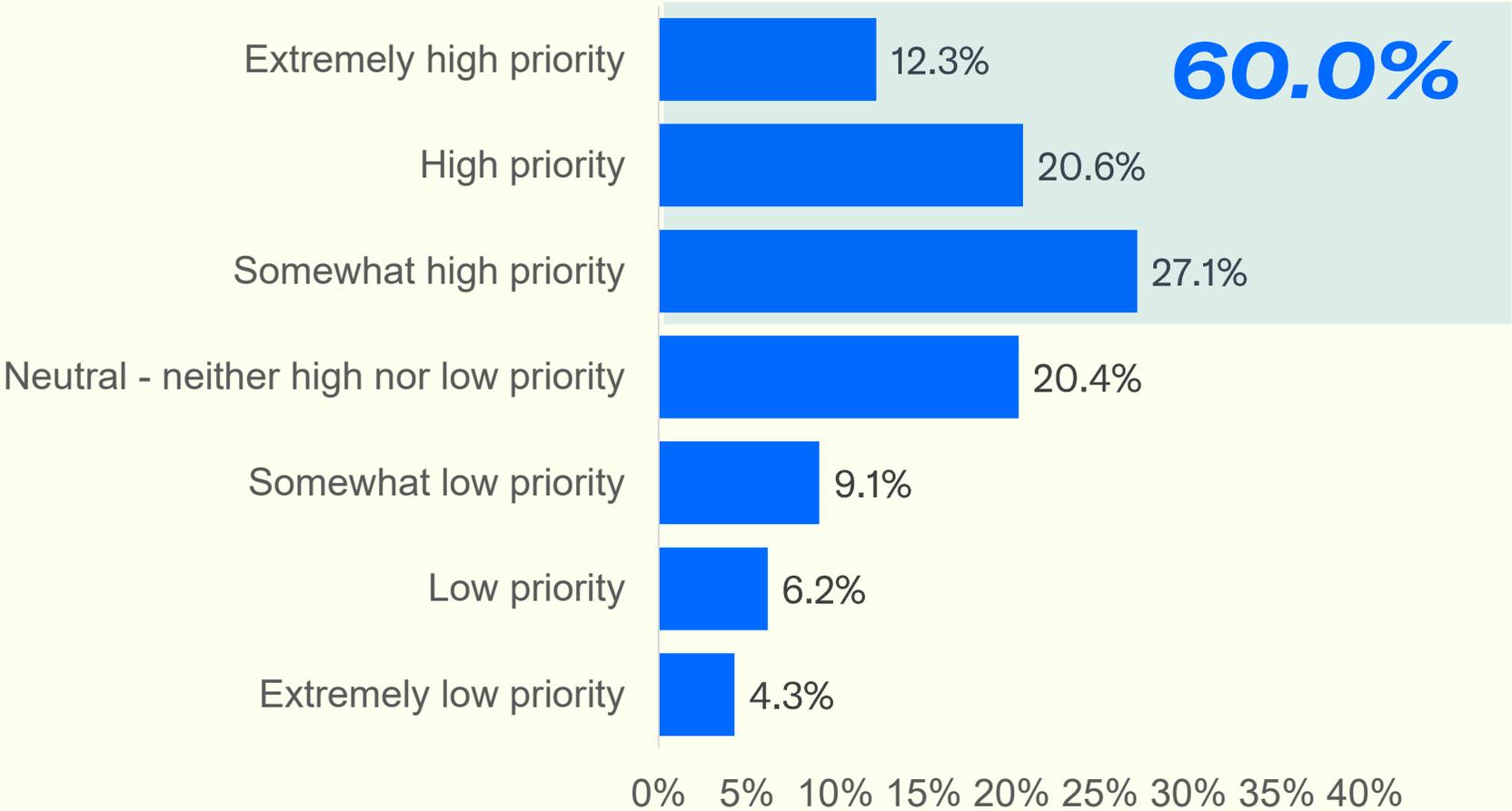


Six in Ten American Travelers are Prioritizing Leisure Travel Spending in the Short-term

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. (Select one)

Leisure travel will be a(n) _____.



Travel as a Budget Priority has Rebounded after a Downward Turn Late Last Year

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) _____.

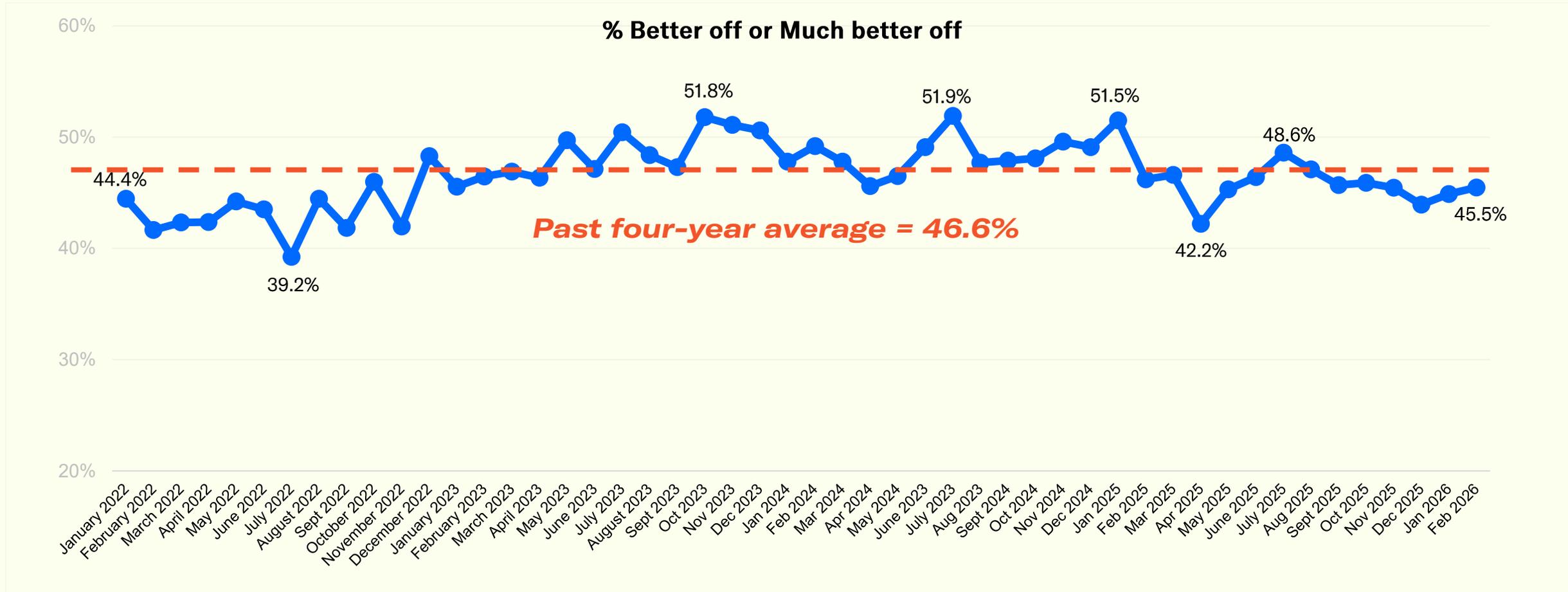
% Leisure Travel as a High Budget Priority



Financial anxiety and the unevenness in who this is felt by amongst traveling consumers create a fiercely competitive environment for capturing destination share. As travelers are more deliberate about spending, destination choice matters even more.

Travelers' Optimism about their Personal Financial Outlook is Tracking Below the 4-Year Average

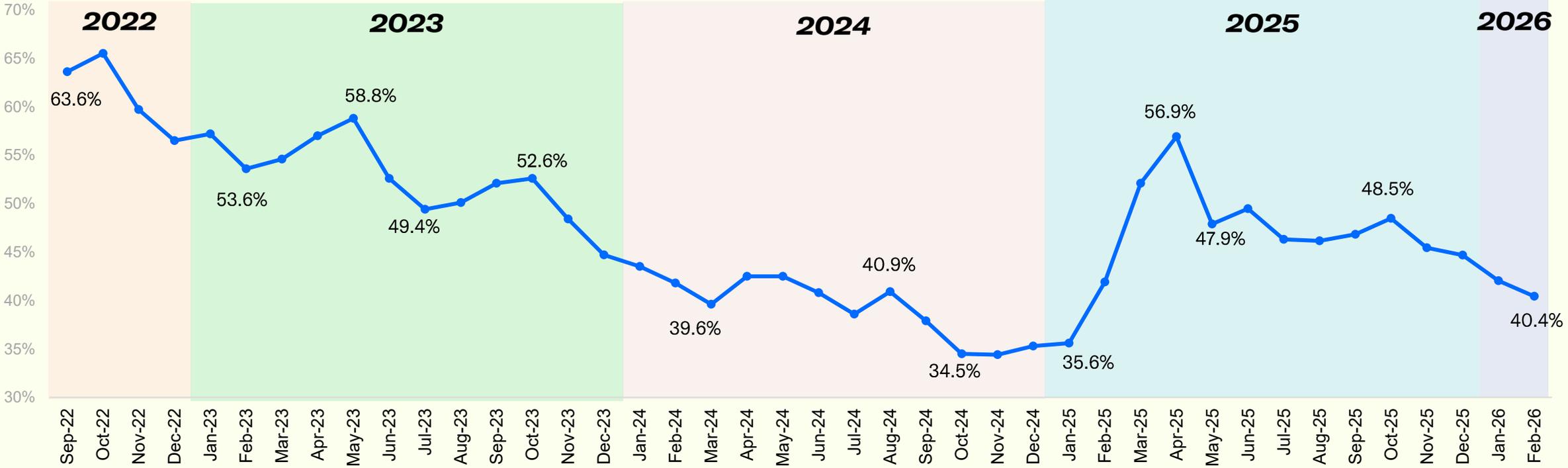
Question: LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Although Recession Fears Have Declined After a Spike Last Spring, They Are Still Elevated Relative to 2024

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

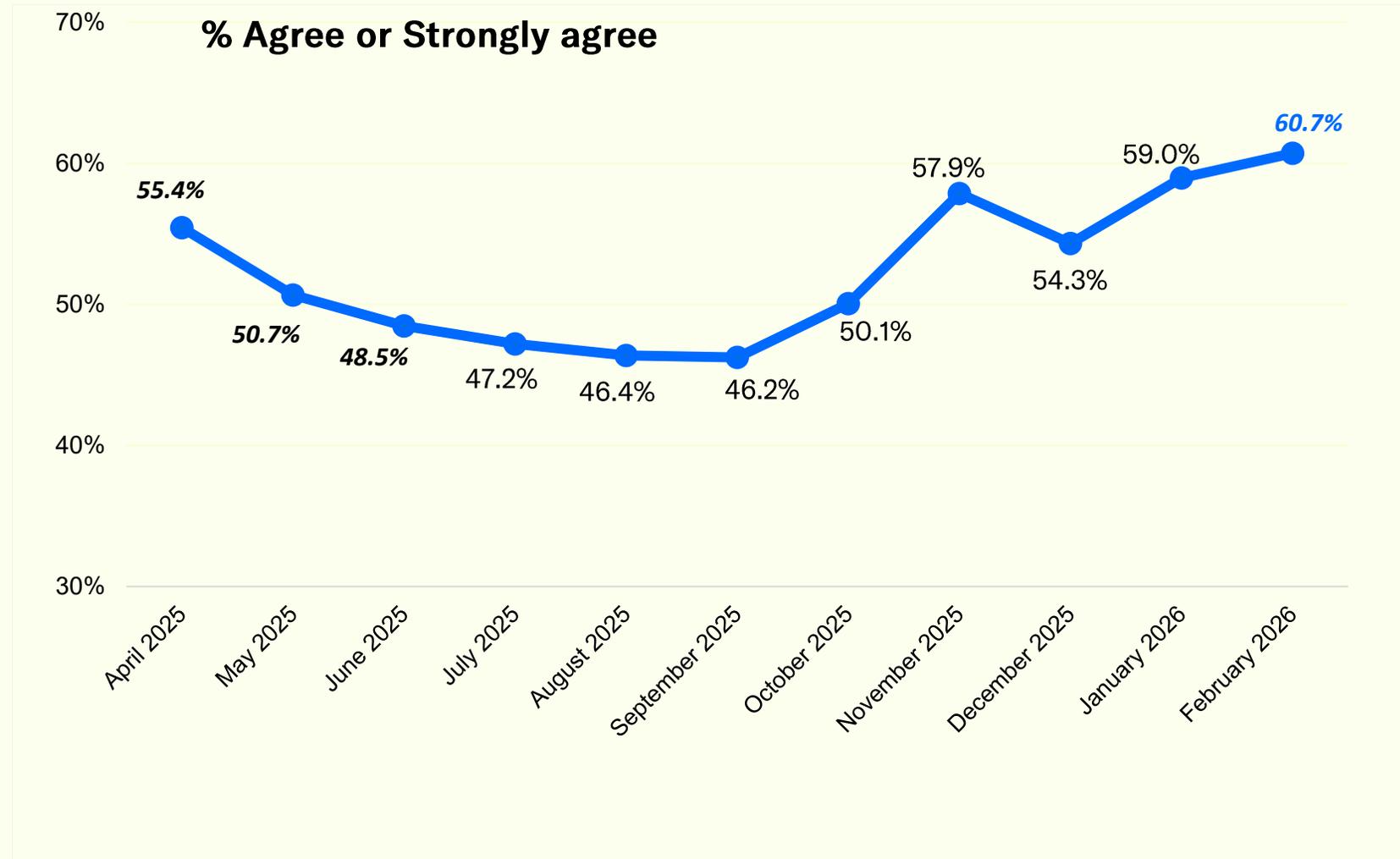
% Agree or Strongly Agree



Spending Caution Fueled by Recession Fears Has Peaked

Question:

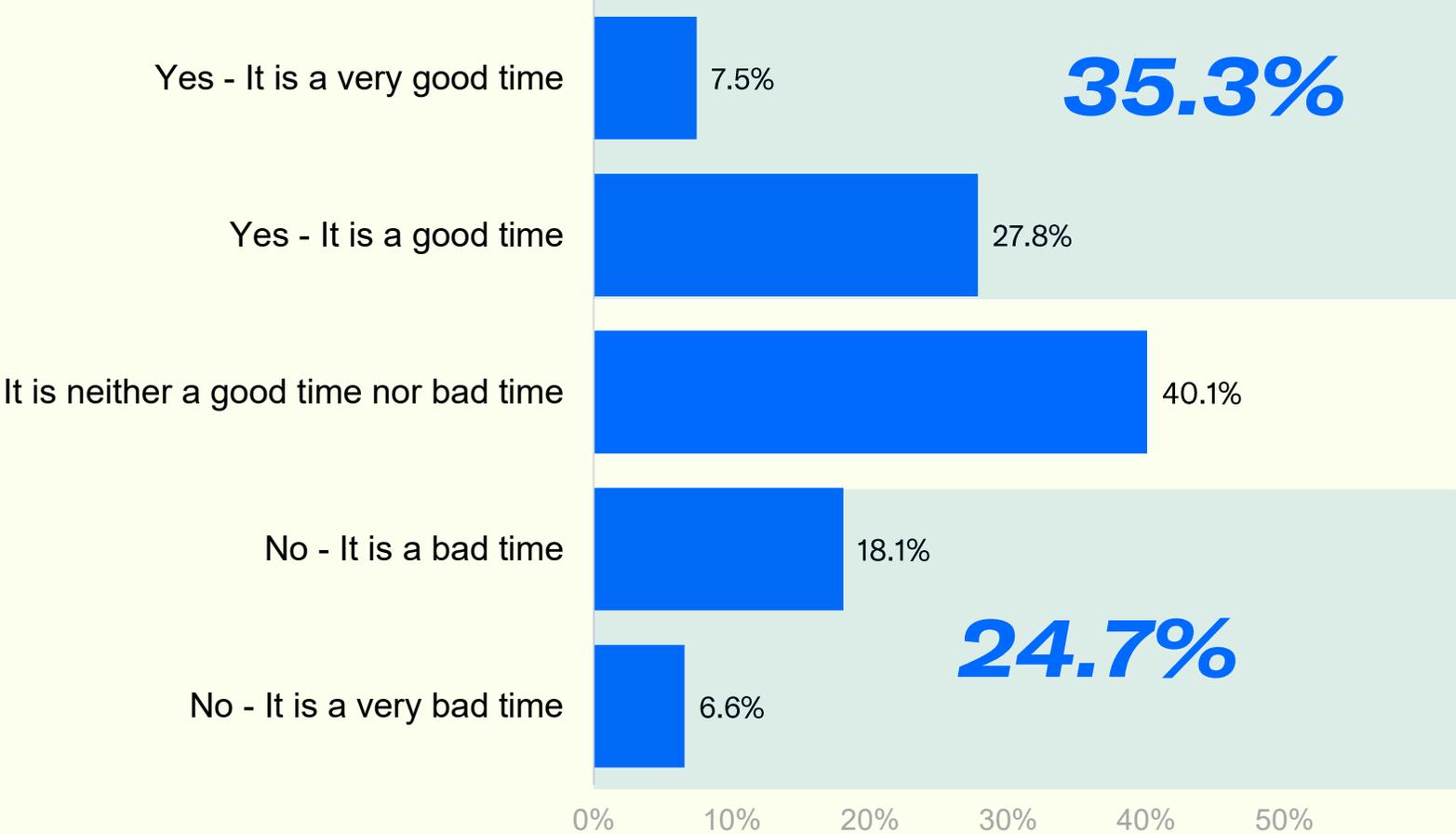
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



Over One-Third of Travelers Say Now is a Good Time to Spend on Leisure Travel

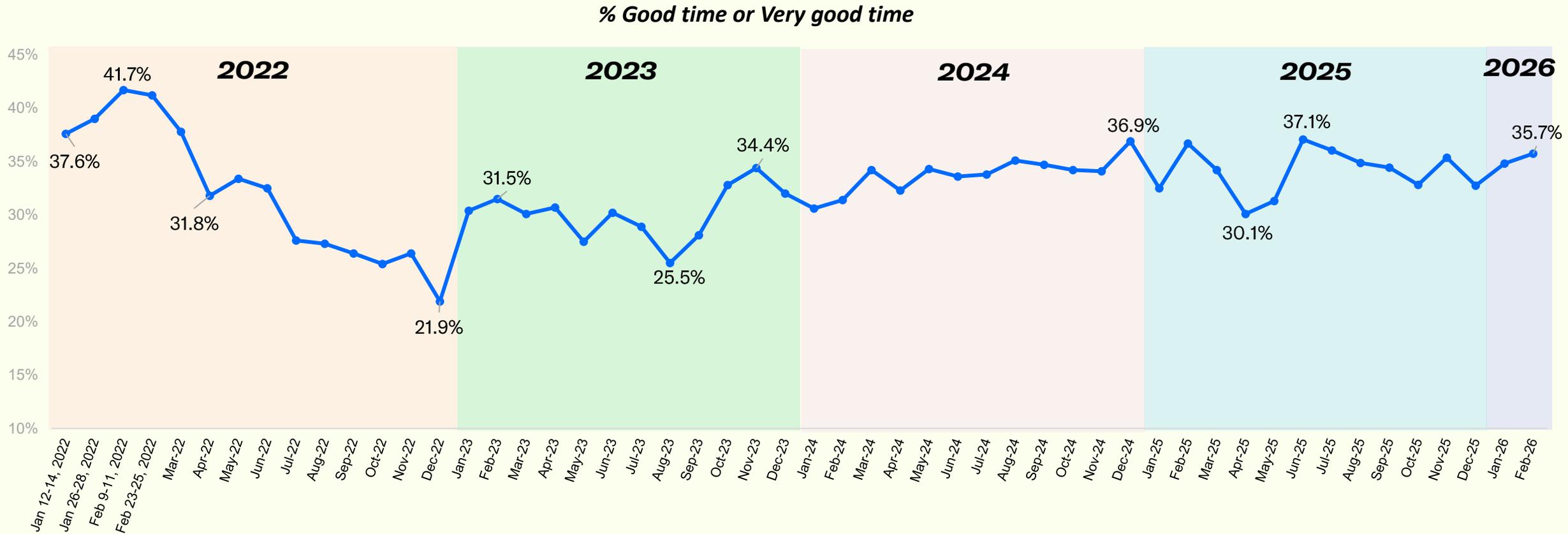
Question:

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? (Select one)



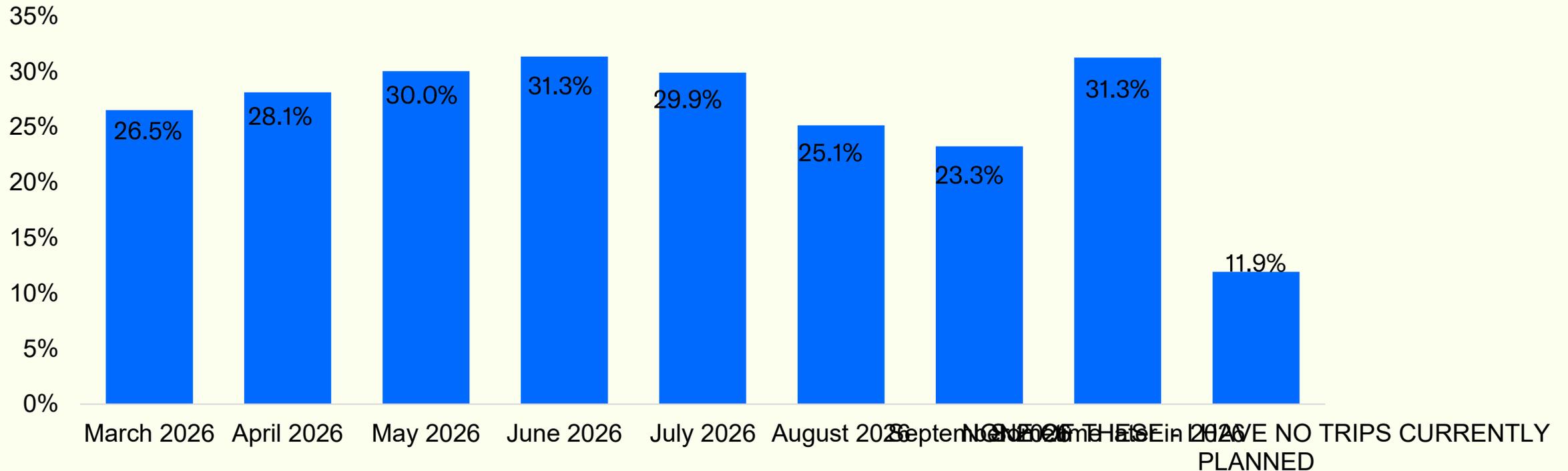
This Sentiment Has Stabilized Over the Last Few Months

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? (Select one)



Over 88% Already Have Leisure Trips Planned in 2026

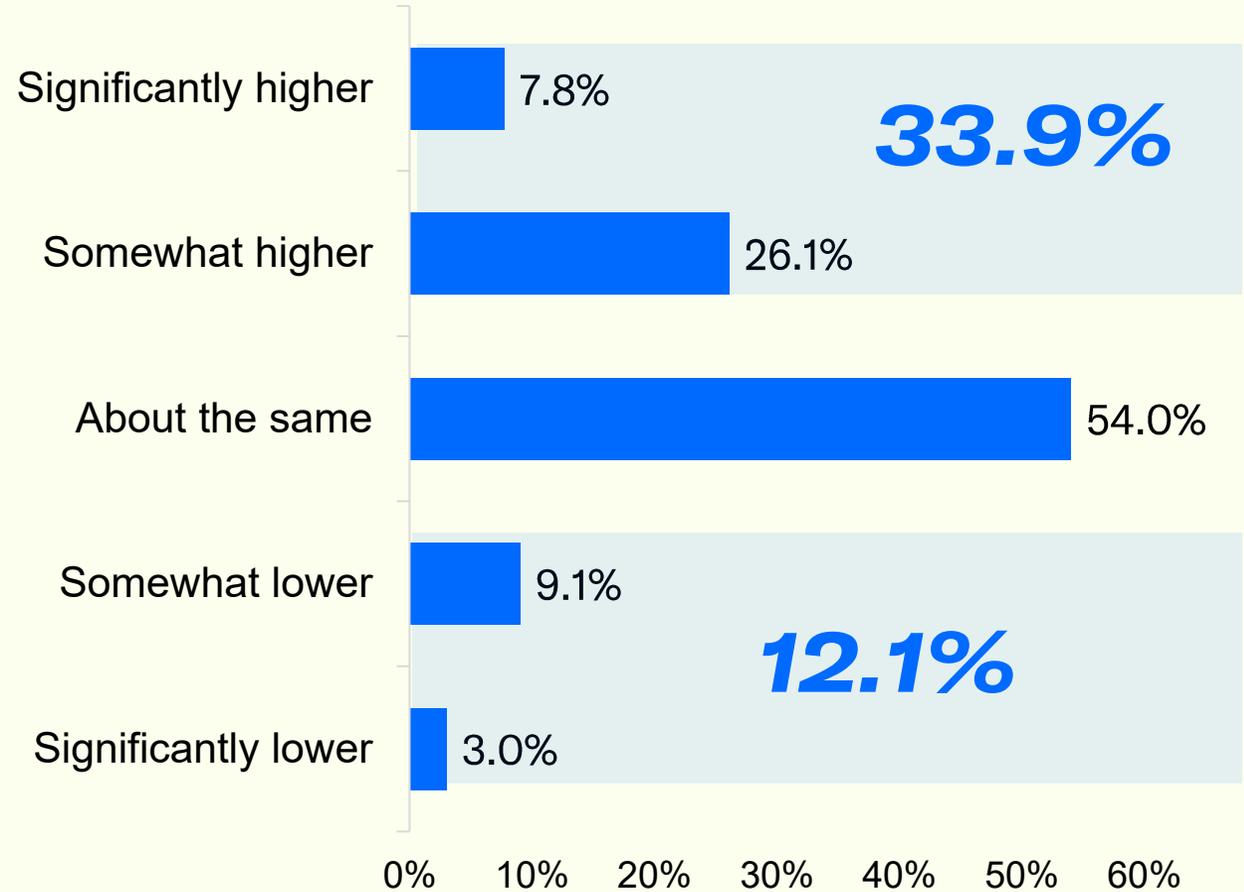
Question: In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



Spending Momentum is Modestly Positive for the Upcoming Summer Season

Question:

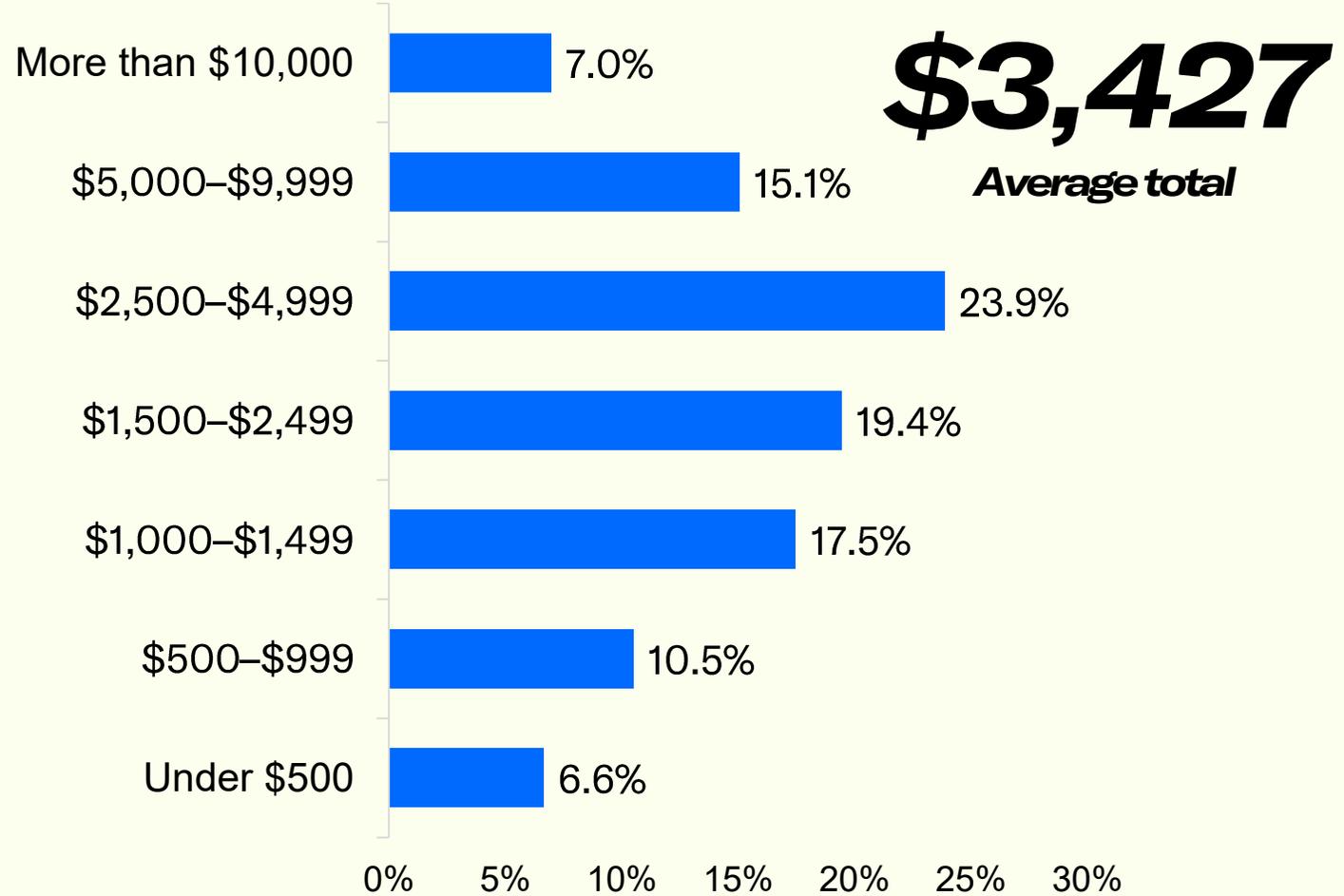
Compared to last summer, your total leisure travel spending this summer will be...



Summer Travel Budgets Cluster in the Mid Range

Question:

Approximately how much do you expect to spend in total for your travels this summer?

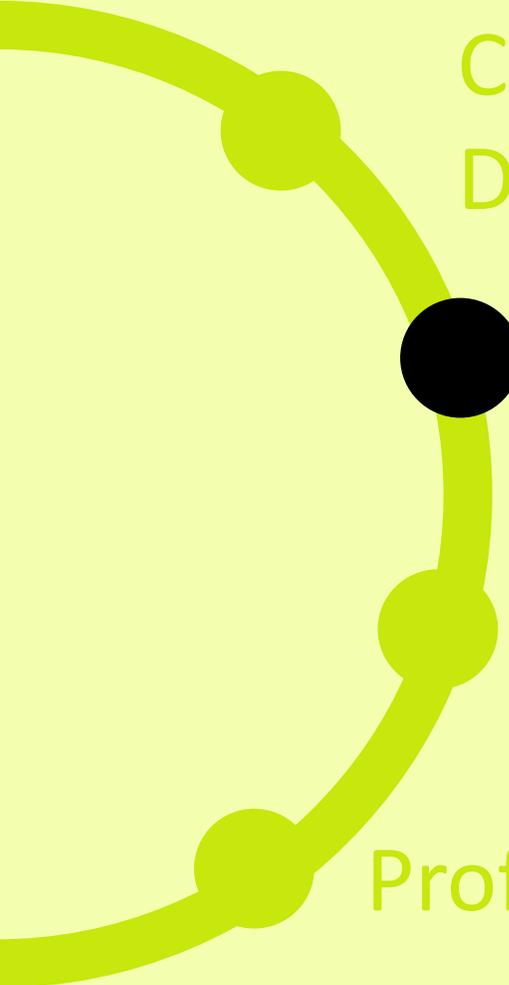


Financial Constraints Continue to be the Biggest Barriers to Travel

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)



Today's Agenda



Current Travel Sentiment Framing Destination
Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced:
Media and Travel Tools

Profile of Off-Season and Dispersal Travelers

Travelers' passions tell destinations which experiences to lead with while travelers' motivations for their trips reveal what destinations need to deliver to win visitors. Destinations don't just compete on "where" — they compete on which version of the traveler's identity they enable. Note that there may be no greater predictor of travel passions and destination aspiration than age or life stage.



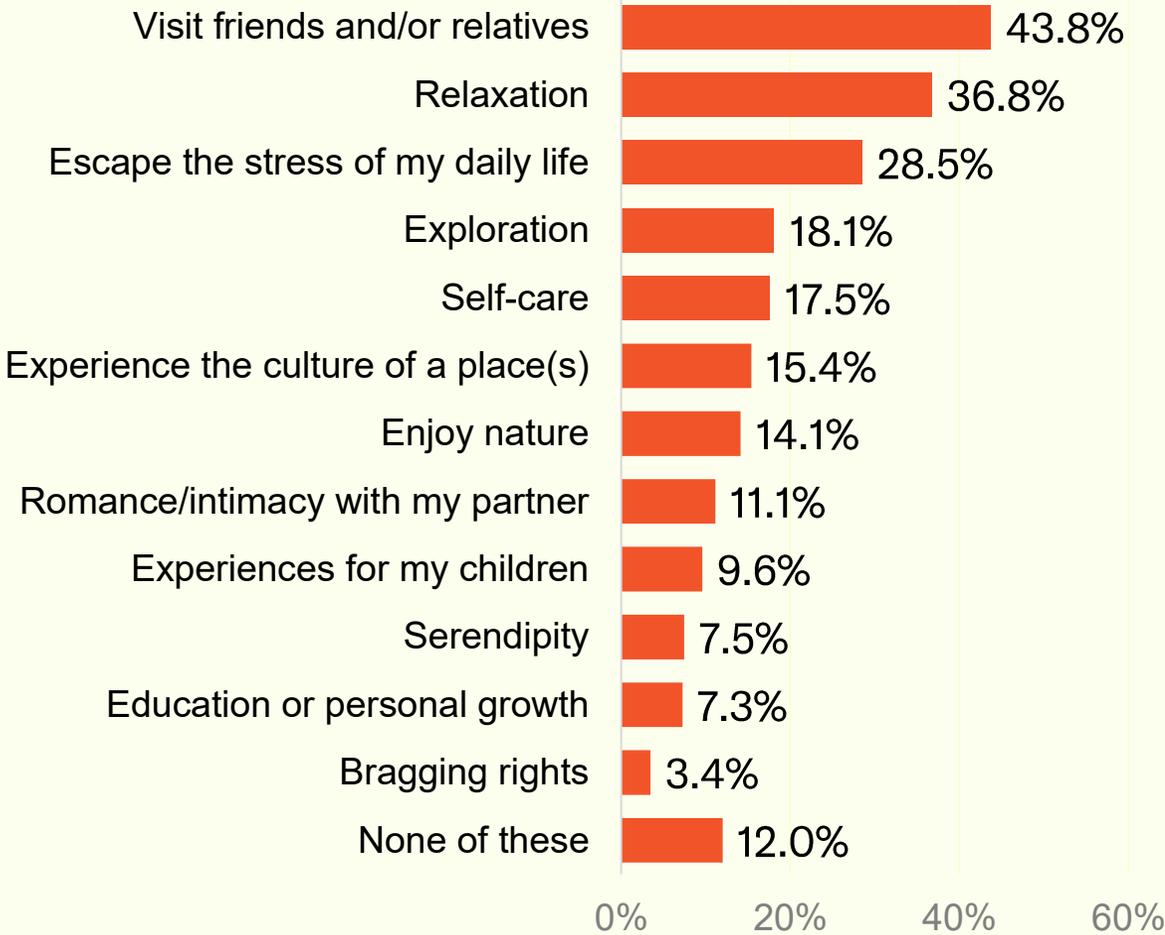
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We Asked Travelers...

Travelers' Most Recent Overnight Trips were Most Commonly Motivated by Visiting Loved Ones, Relaxing and Escaping Day-to-day Stress

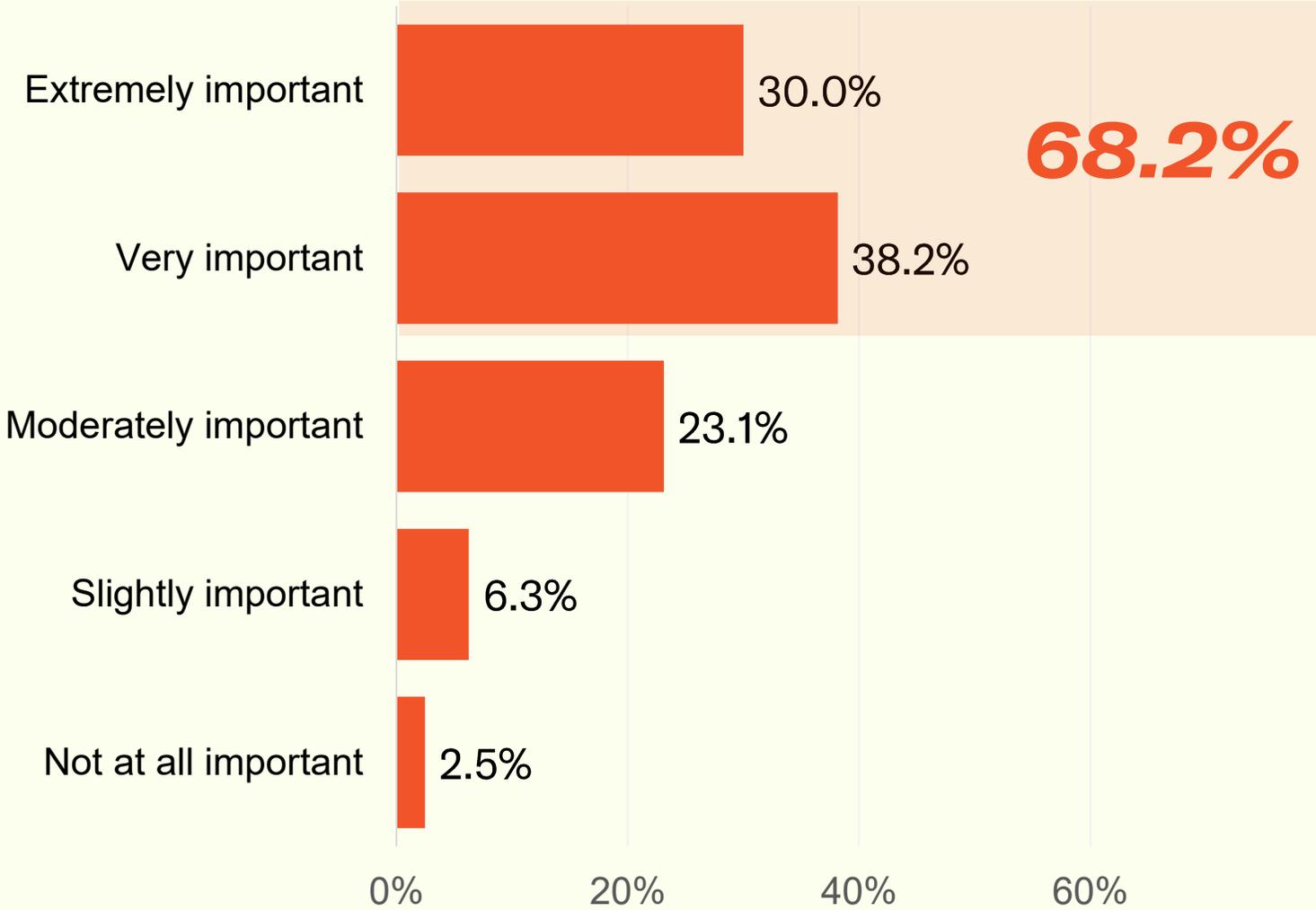
Question:

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?



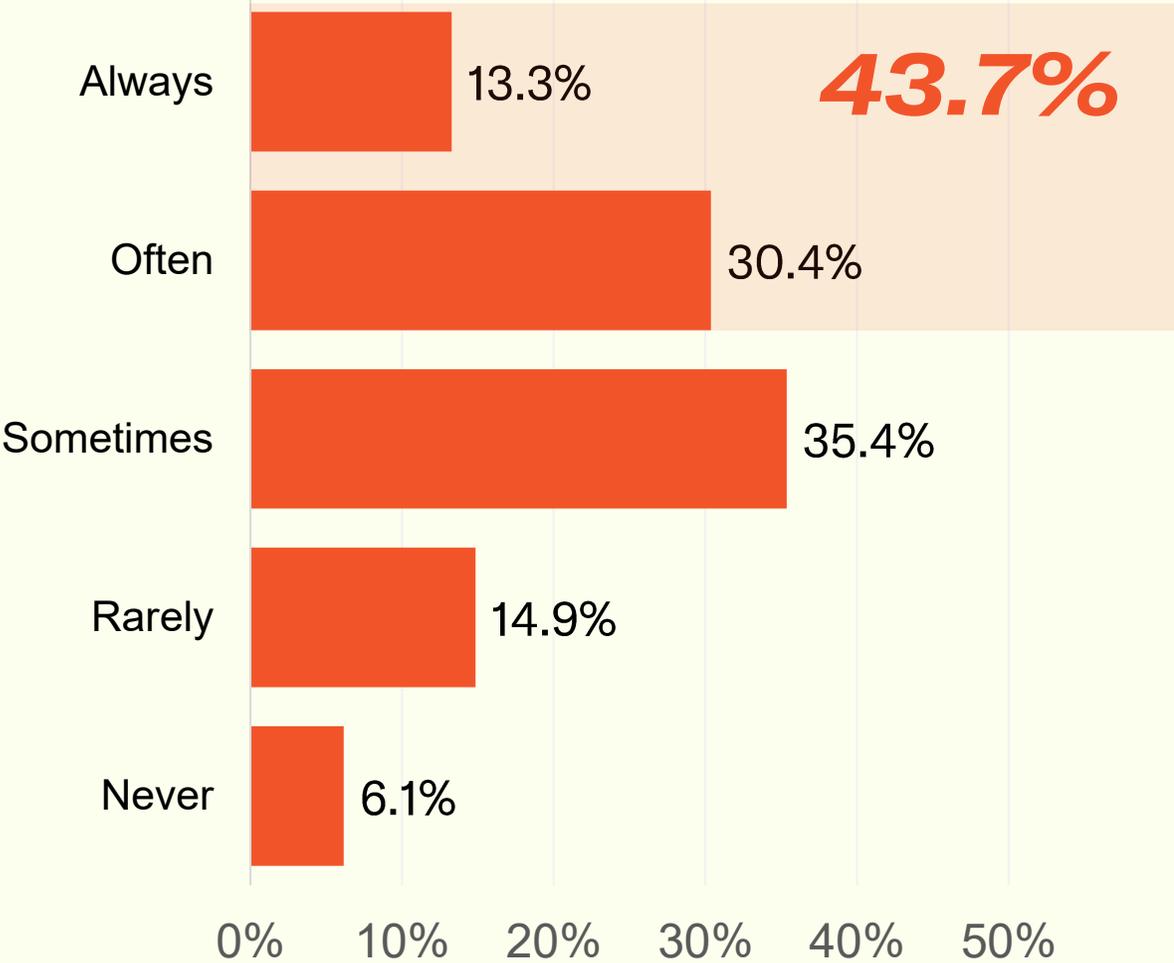
Travel is Widely Used by People to Support their Overall Well-Being

Question:
Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)



More than 40% of Travelers Often or Always Plan their Leisure Trips Specifically to Support Their Well-Being

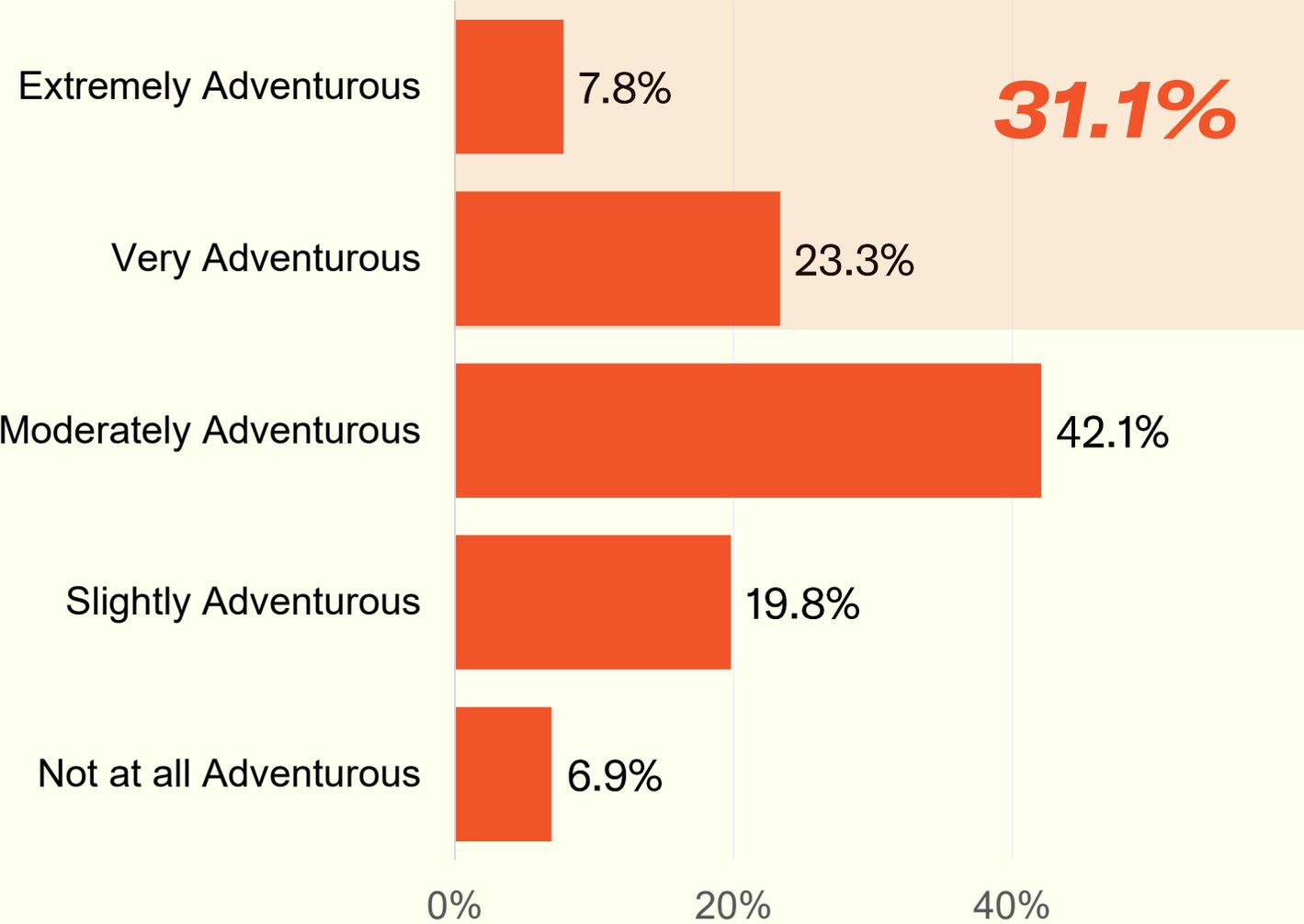
Question:
How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?



The Majority of Travelers Consider Themselves Adventurous Travelers

Question:

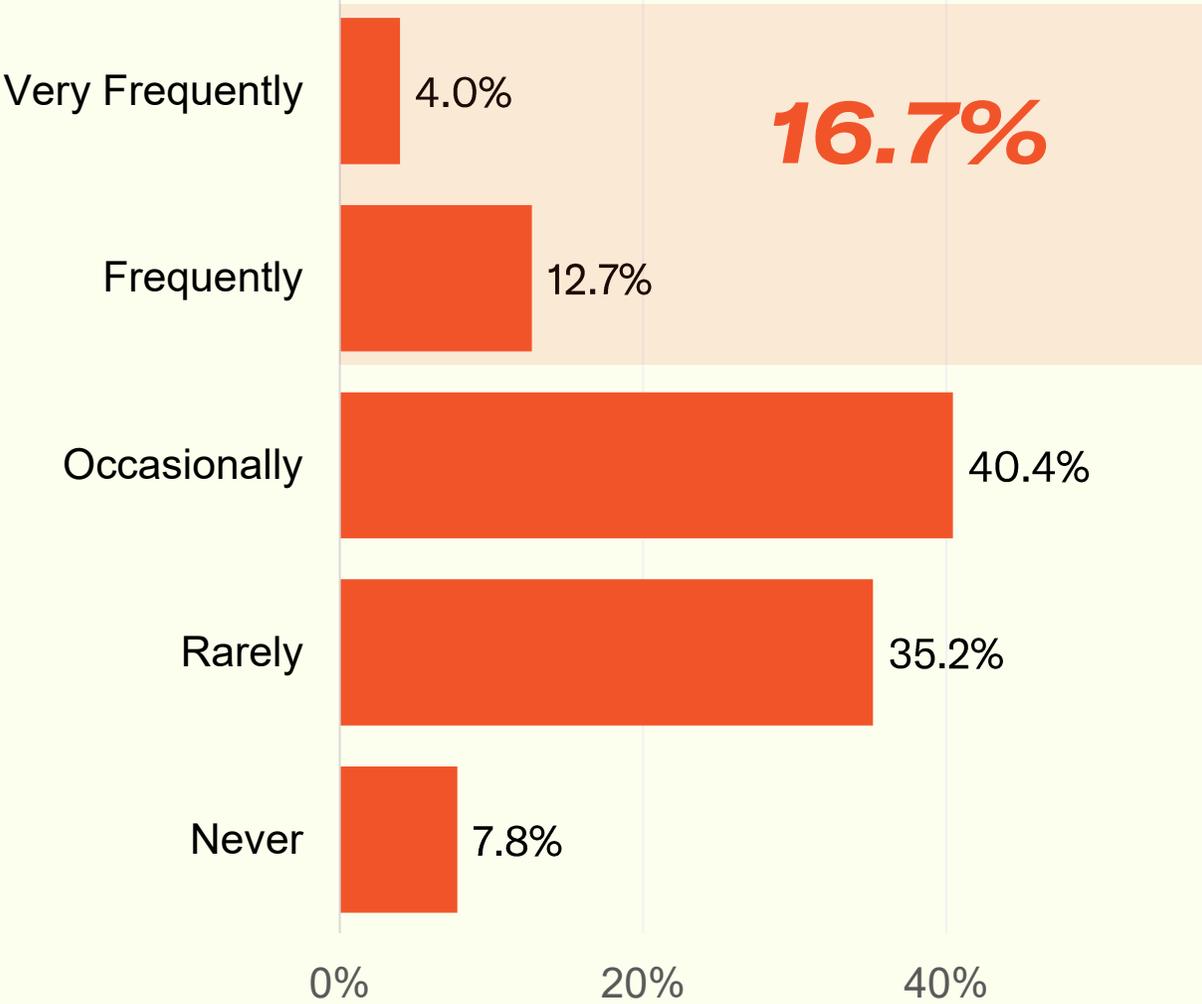
How adventurous do you consider yourself to be while traveling?



Spontaneity is Not a Frequent Motivator

Question:

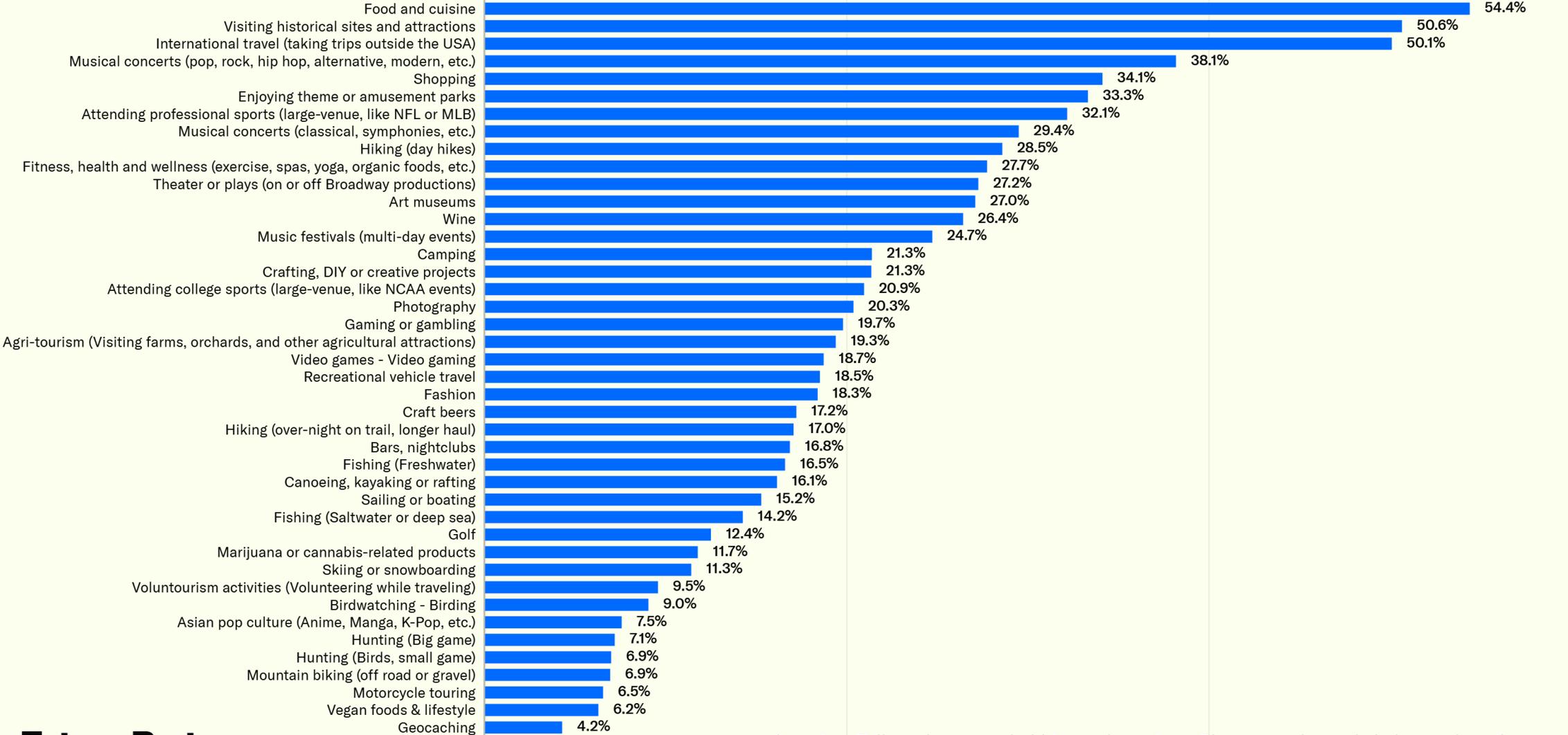
How often do you take spontaneous leisure trips (i.e., trips sparked by impulse which begin soon after the idea arises)?



Travelers' Passions & Hobbies Underlie Destination Decisions

Travel Passions & Hobbies

(Top 2 Box - % selecting "Extremely high interest" or "High interest")



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

(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

Base: American Travelers, 2026 YTD respondents. 4,022 completed surveys.

Travel Passions Follow a Life Stage Arc— Although Food Bridges All

Gen Z

"Who Am I?"

- Nightlife · festivals
- Fashion · shopping
- Photography · gaming

Intl. travel passion: ~65%

Millennials

"Balance + experience"

- Concerts · theme parks
- Fitness · wellness
- Hiking · outdoors

Intl. travel passion: ~60%

Gen X

"How does this fit my life?"

- Wine · art museums
- Theater · cultural
- Skiing · golf emerging

Intl. travel passion: ~50%

Boomers

"What do I enjoy deeply?"

- Historical sites
- Wine · theater
- Museums · golf

Intl. travel passion: ~40%

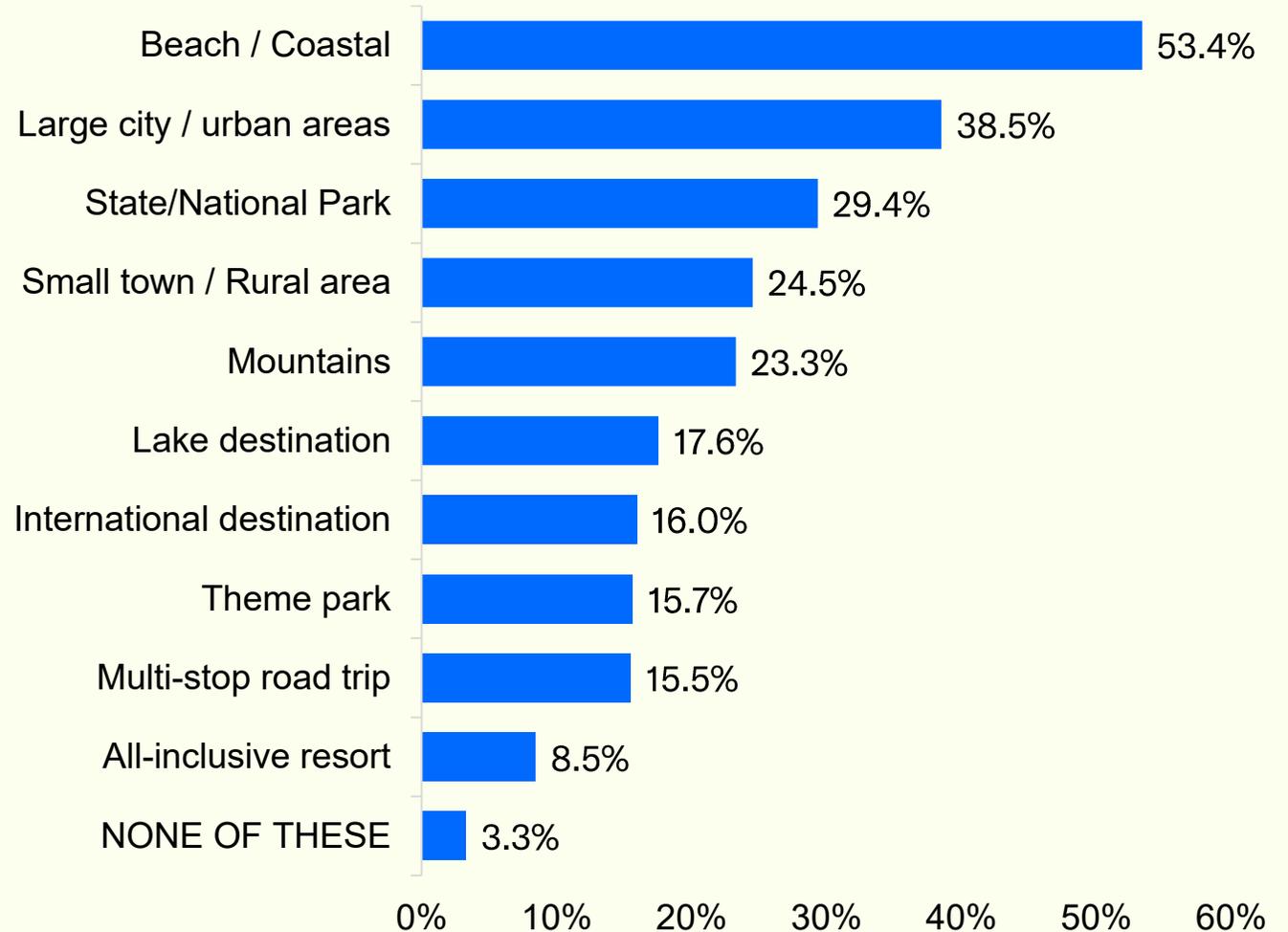
Food & cuisine: the only truly universal passion

~45–58% across ALL generations — the single most reliable hook for any destination

For Upcoming Summer Trips, Beach Rules, but Cities and Outdoors are Strong

Question:

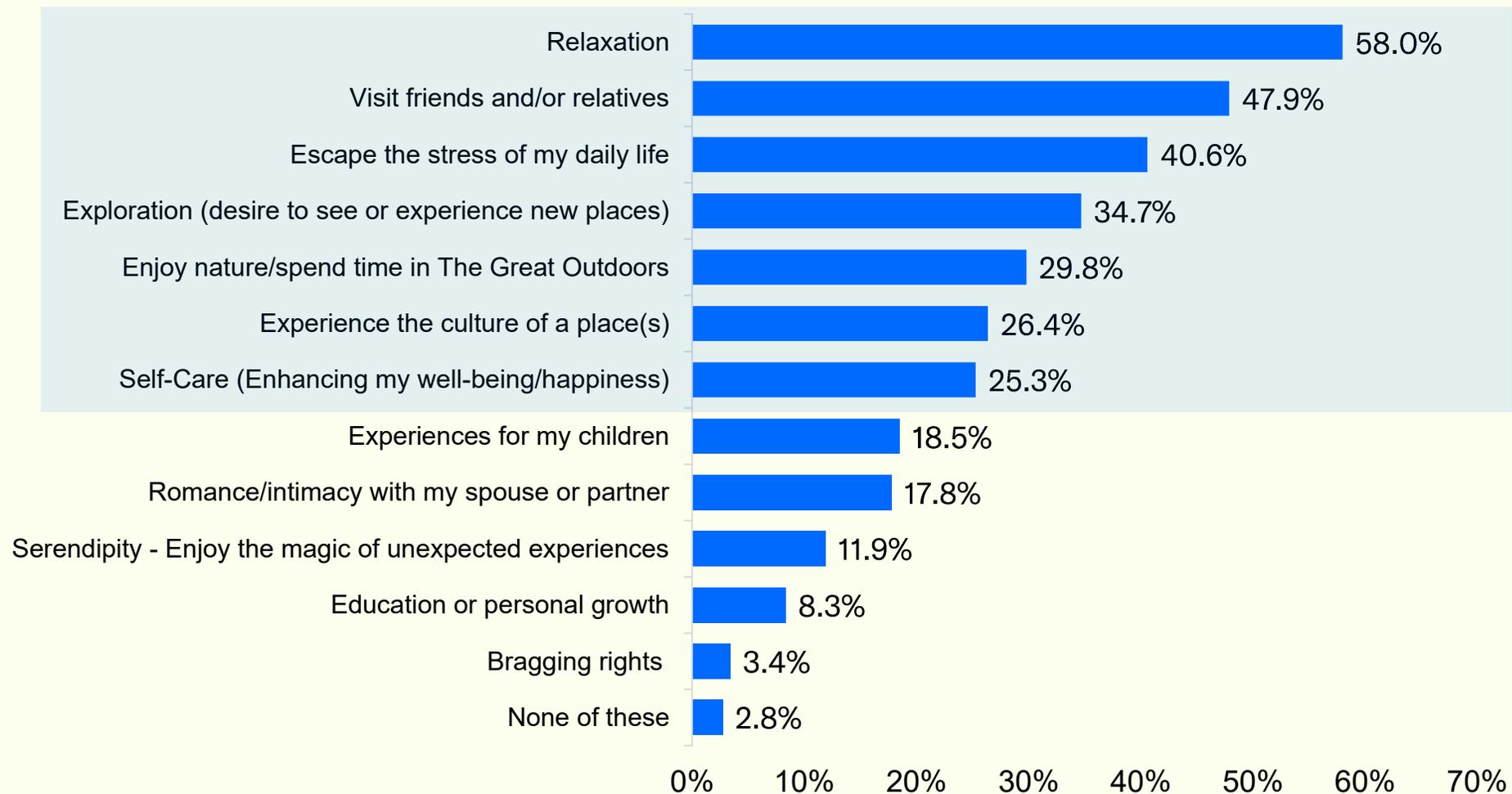
On your summer leisure trips, what types of destinations do you expect to visit this summer?



Relaxation and Reconnecting Dominate Summer Travel Motives

Question:

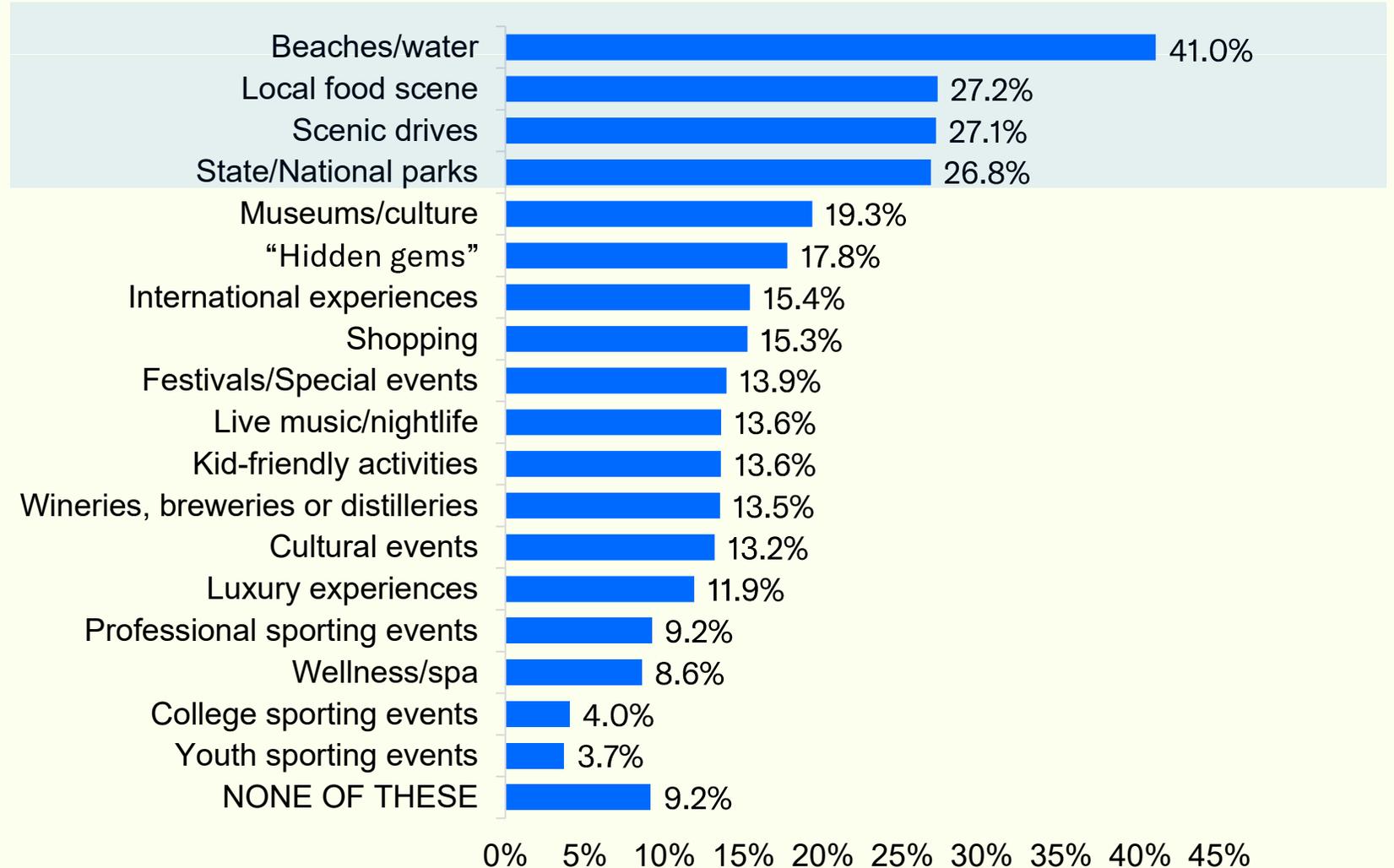
Which of the following best describe why you are traveling this summer?



Experiences Sought for Upcoming Trips: Water, Food, Nature and the Open Road

Question:

Which trip experiences are you prioritizing this summer?



While Beach Destination Travelers are Primarily Focused on the Water and Wellness, Urban Destination-Goers are Seeking Food, Museums, Festivals and Nightlife. Nature-Based Destination-Choosers want Scenic Drives and Parks, while Small Town Goers are Most Apt Towards Hidden Gems and Kid-Friendliness

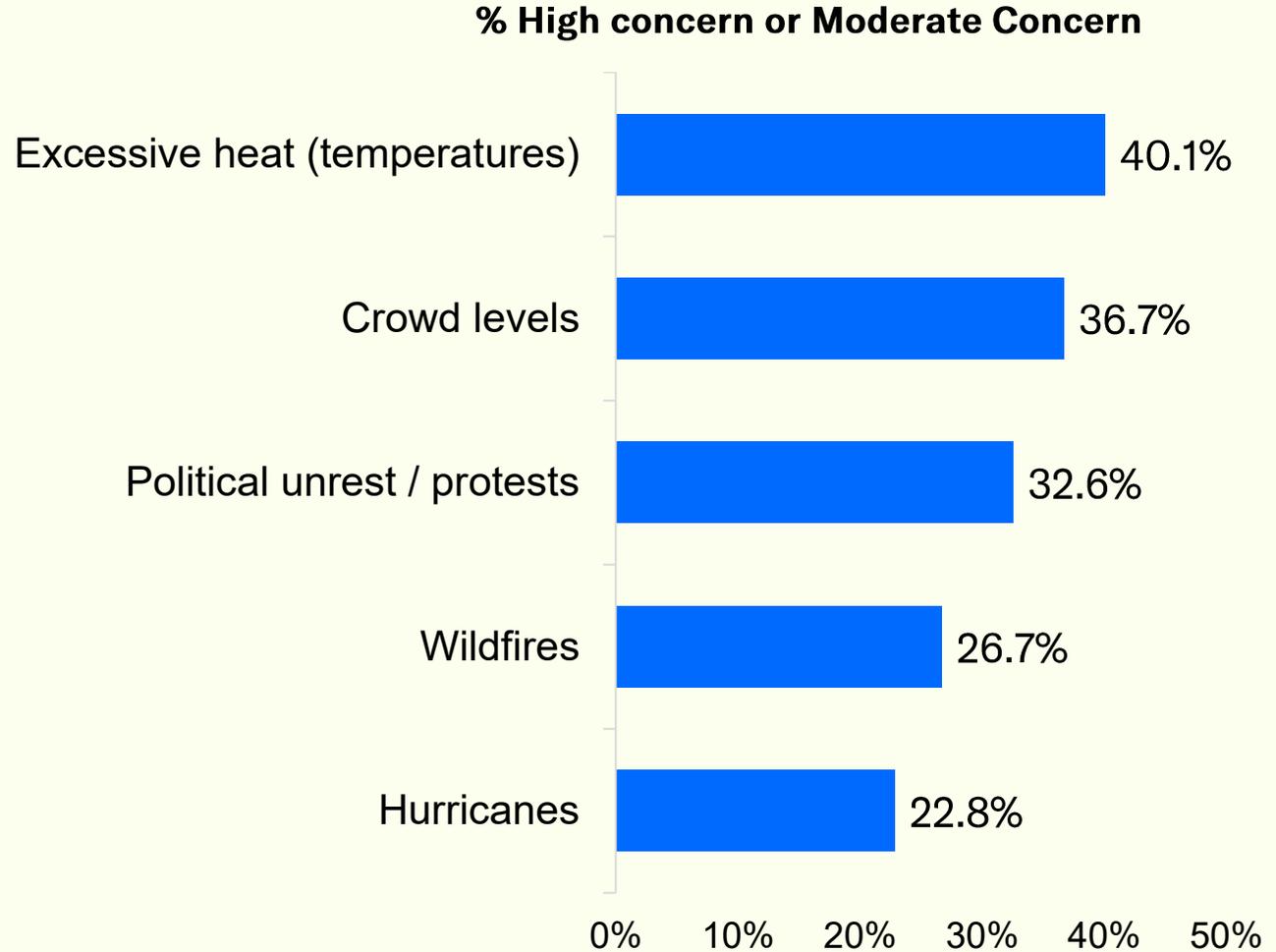
Experience	Beach	Urban	Parks/Nature	Small Town
Beaches/water	~85%	~25%	~20%	~18%
Food scene	~45%	~70%	~35%	~30%
Scenic drives	~40%	~25%	~65%	~60%
Parks	~30%	~20%	~80%	~55%
Museums/culture	~28%	~65%	~22%	~25%
Hidden gems	~42%	~45%	~60%	~65%
Festivals/events	~35%	~55%	~30%	~28%
Nightlife	~30%	~50%	~15%	~12%
Kid-friendly	~38%	~35%	~45%	~50%
Wellness/spa	~42%	~25%	~30%	~35%

Risk Concerns Affect Destination Choice Right Now

Question:

Think about how you will be evaluating the places you choose to visit this summer.

How concerned are you about the following affecting your destination choice this summer?



Risk Factors Vary in Importance by Destination Choice

Risk Sensitivity by Destination Type

Factor	Beach	Urban	Parks/Nature	Small Town
Excessive heat	~55%	45%	40%	42%
Crowds	50%	~65%	48%	45%
Wildfires	15%	12%	~45%	30%
Hurricanes	40%	10%	8%	12%
Political unrest	25%	35%	20%	~18%

Key differences

Beach

Highly sensitive to:

- Heat (~55%)
- Hurricanes (~40% — unique to this segment)

Urban

Most concerned about:

- Crowds (~65%)
- Political/social issues

Nature

Dominated by:

- Wildfire concern (~45% — 3x urban)

Small Town

- Lower overall risk sensitivity
- Moderate across all factors

Destination Choice in Summary : Different Motivations, Different Risk Assessments

Travel Motivations & Decision Questions by Trip Type

BEACH TRIPS » "I want to unwind"

- Primary driver: Relaxation (~70%+)
- Top priority: Beaches/water (~85%)
- Key concern: Heat & hurricanes (~40–55%)

👉 Decision: *"Will this feel easy, relaxing, and stress-free?"*

NATURE TRIPS » "I want something meaningful"

- Primary driver: Nature connection (~75%)
- Top priorities: Parks (~80%), scenic drives (~65%)
- Key concern: Wildfires (~45%)

👉 Decision: *"Is this unique, authentic, and worth the effort?"*

CITY TRIPS » "I want to experience more"

- Primary driver: Exploration & culture (~60–65%)
- Top priorities: Food scene (~70%), culture, nightlife
- Key concern: Crowds (~65%)

👉 Decision: *"How much can I do, see, and experience?"*

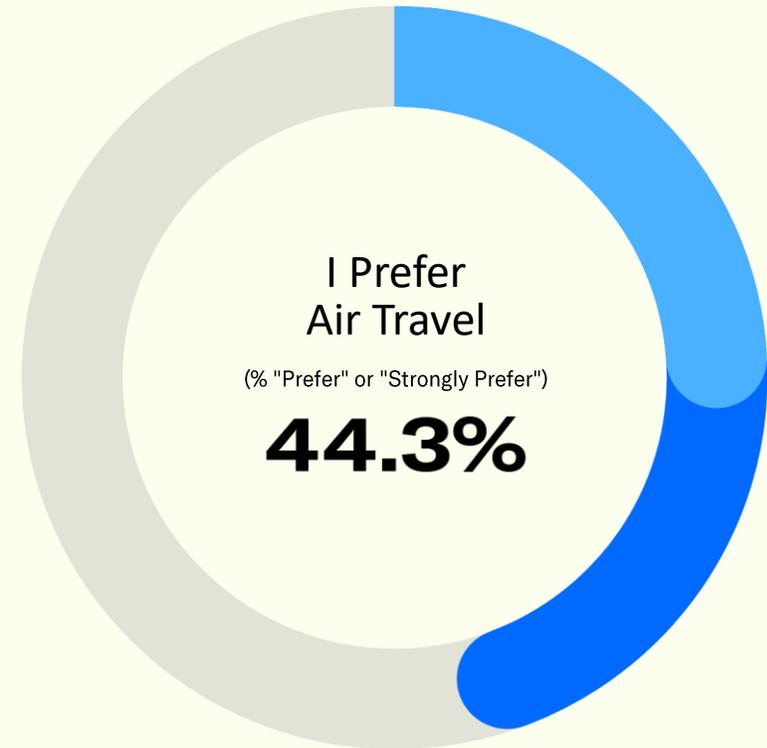
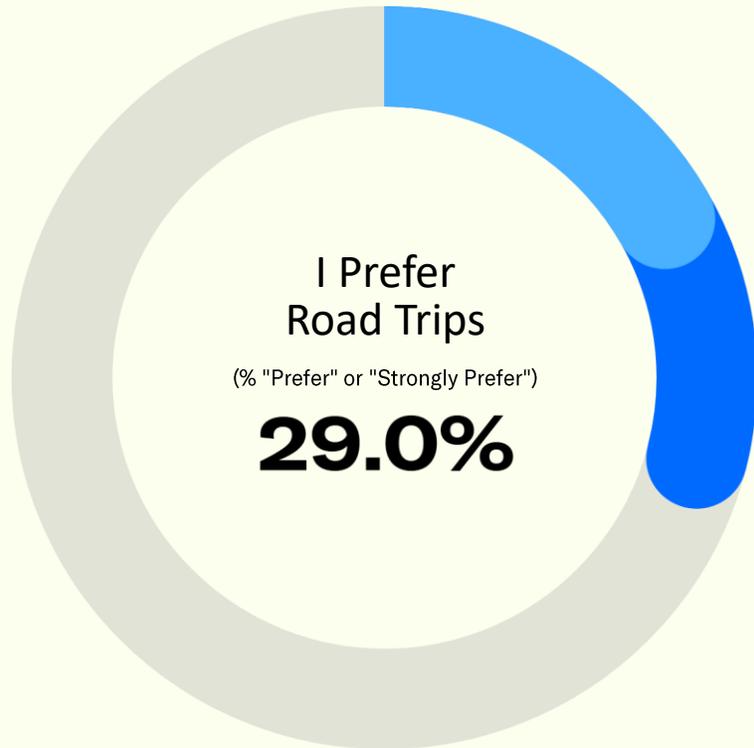
SMALL TOWN TRIPS » "I want something different (but easy)"

- Primary drivers: Relaxation + discovery
- Top priorities: Hidden gems (~65%), family-friendly (~50%)
- Lower risk sensitivity overall

👉 Decision: *"Is this simple, enjoyable, and a little off the radar?"*

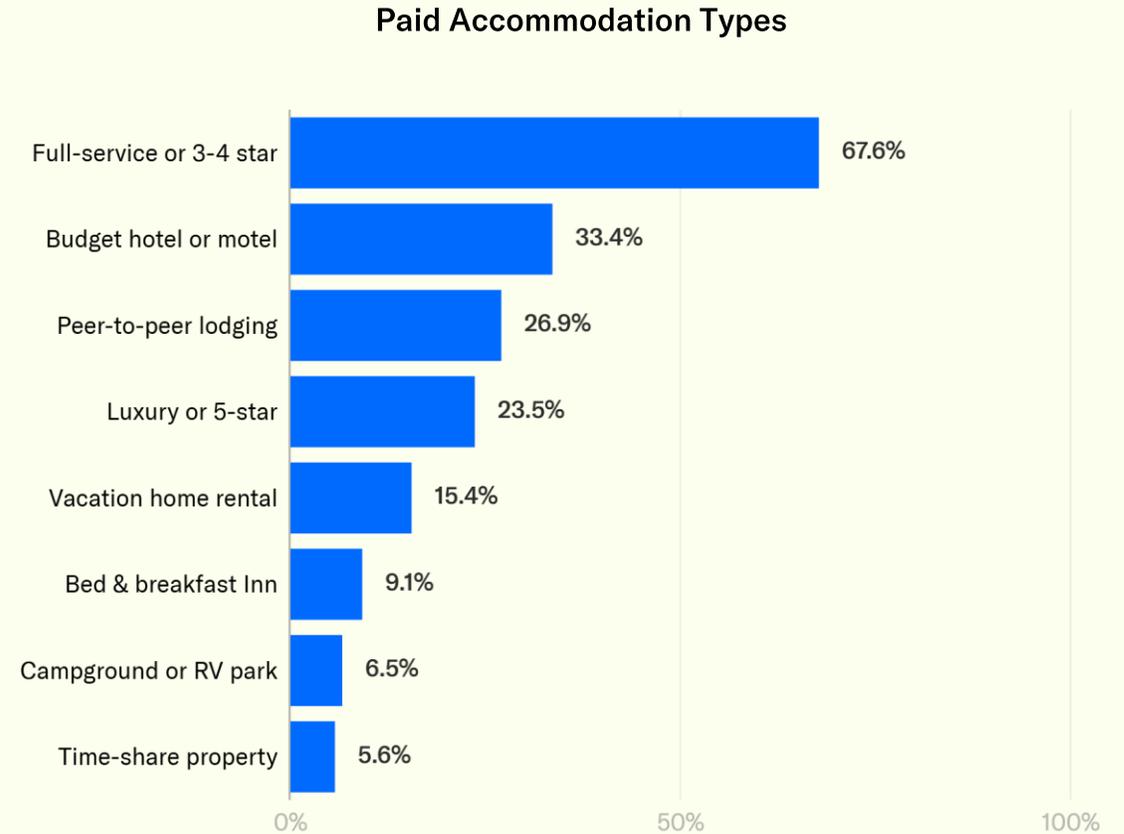
American Travelers' Preferences Skew Towards Air Travel versus Road Trips

Question: Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)?
When it comes to road trips vs. air travel, I...



Prefer
Strongly Prefer

American Travelers' Typically Lean Towards Full-Service 3 or 4-Star Hotel Properties



Question 1: In the PAST 12 MONTHS, on any trips have you STAYED OVERNIGHT IN ANY PAID LODGING (i.e., a hotel, motel, inn, vacation rental, Airbnb type rental, etc.)?

Question 2: In the PAST 12 MONTHS, which type of paid lodging have you stayed in? (Select all that apply)



Domestic Hotspots

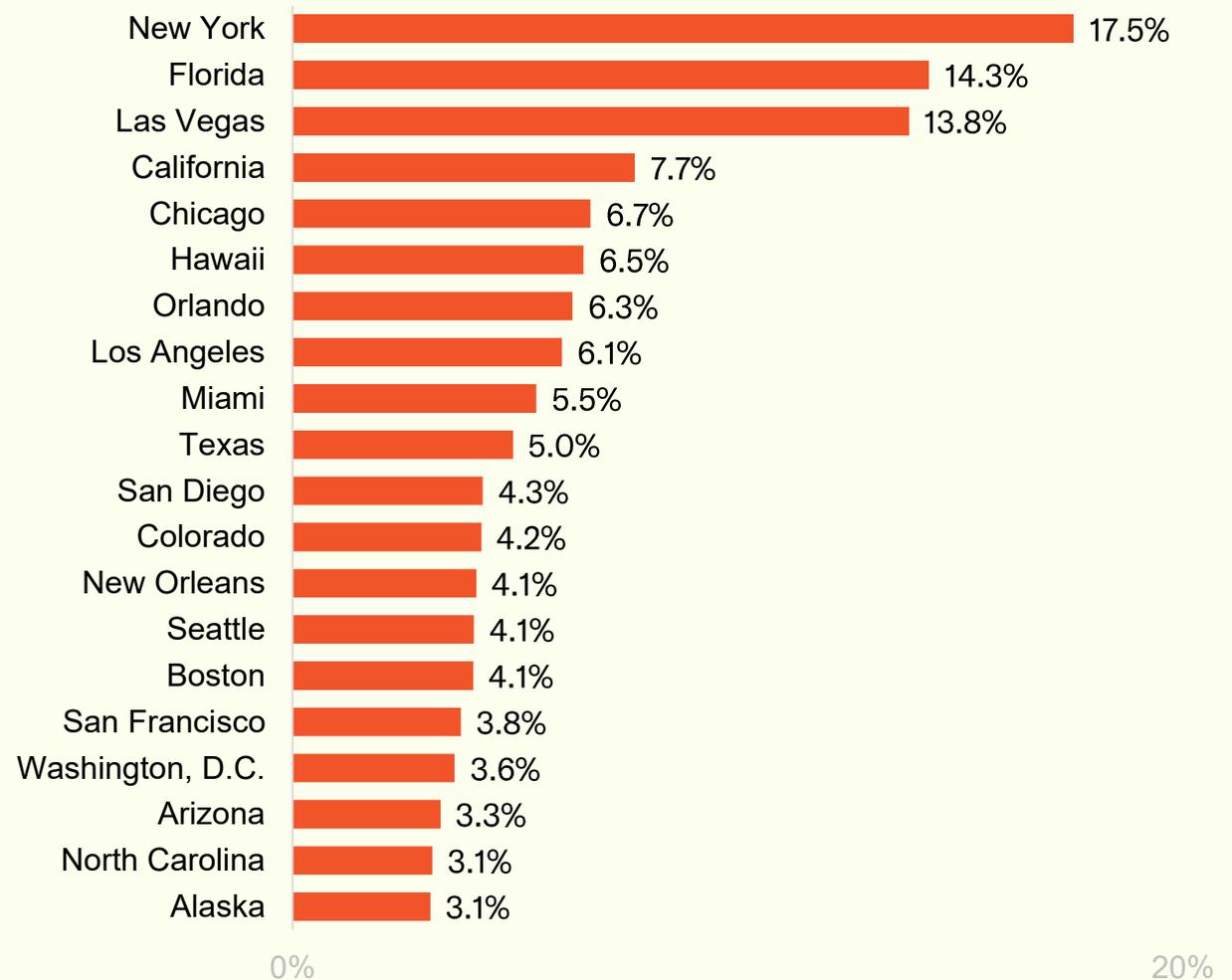
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The State of the American Traveler

New York, Florida, and Las Vegas are the Top Three Most-Mentioned Desired Domestic Destinations among American Travelers

Question:

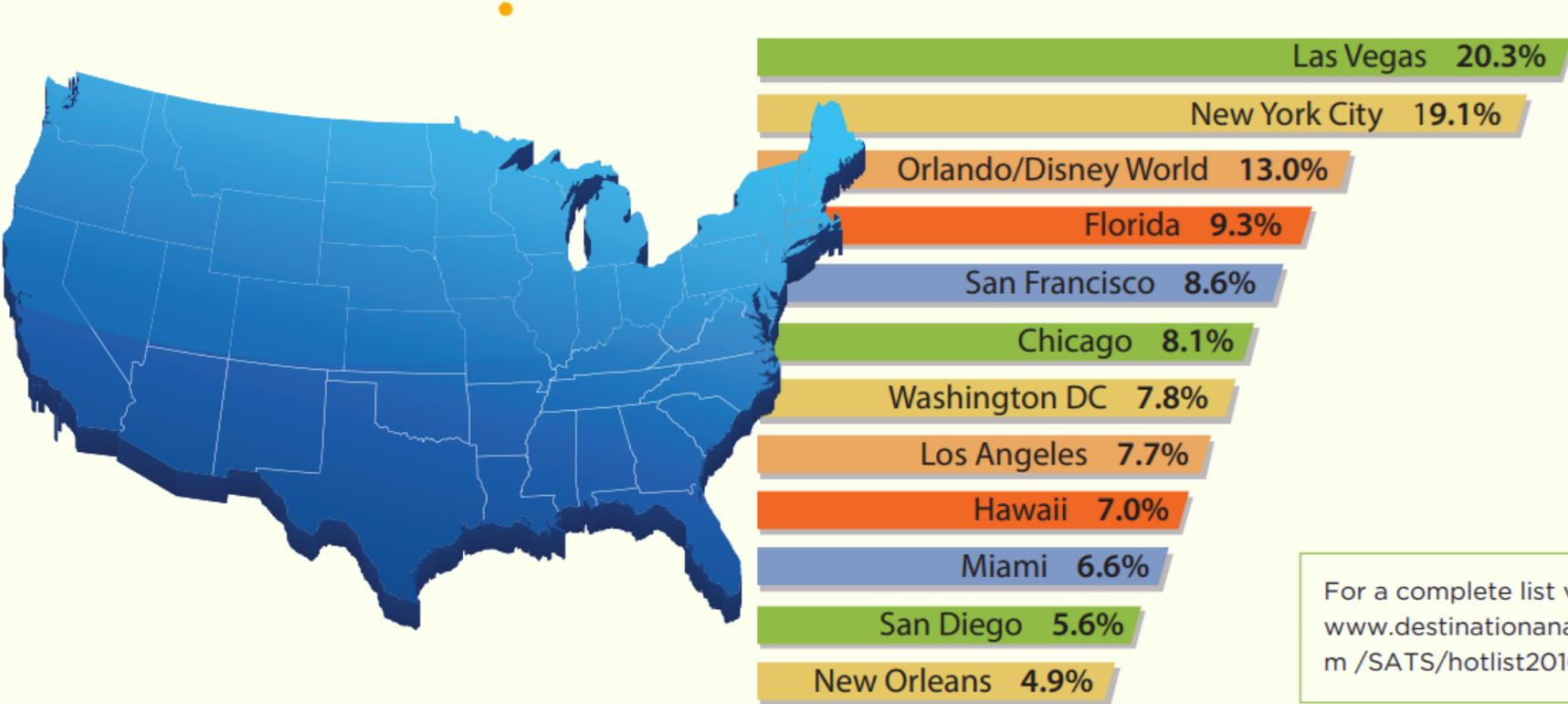
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)



A Look Back: 2016

Most Desired U.S. Destinations — 2016

What are the five domestic destinations that you would most like to visit in the upcoming year? (OPEN ENDED)



For a complete list visit www.destinationanalysts.com/SATS/hotlist2016

Generation Drives Destination Desires

Top Aspired Destinations by Generation

→ Gen Z's New York Gravity

At 34.5%, Gen Z's pull toward New York is nearly double any other generation — a phenomenon with real targeting implications.

Destination	Gen Z	Millennial	Gen X	Boomer+
New York	34.5%	22.7%	17.4%	12.4%
Florida	24.6%	13.8%	14.0%	11.0%
Las Vegas	8.0%	17.4%	15.4%	12.0%
California	13.9%	10.0%	8.1%	4.3%
Miami	13.1%	9.7%	5.2%	1.8%
Los Angeles	11.1%	7.9%	5.7%	4.3%
Boston	12.9%	4.9%	3.9%	2.7%
Texas	10.6%	5.9%	4.4%	2.8%
Orlando	3.0%	6.9%	8.6%	4.9%
Hawaii	7.2%	8.7%	7.2%	4.7%

Income Shapes Destination Dreams

Top Aspired Destinations by Income Level

Destination	\$200K+	\$100–199K	\$50–99K	<\$50K
New York	24.2%	19.2%	16.4%	13.9%
Las Vegas	15.5%	16.0%	16.1%	9.8%
Florida	12.7%	13%	13.0%	13.4%
Hawaii	13.2%	9.1%	6.1%	3.5%
Orlando	7.5%	6.7%	5.7%	4.5%
California	8.2%	8.0%	7.5%	7.1%
Texas	3.0%	4.0%	4.6%	5.5%
Miami	6.2%	5.6%	5.4%	4.1%
Boston	5.9%	4.5%	3.3%	2.9%

Destination Decisions: Upcoming Major Events

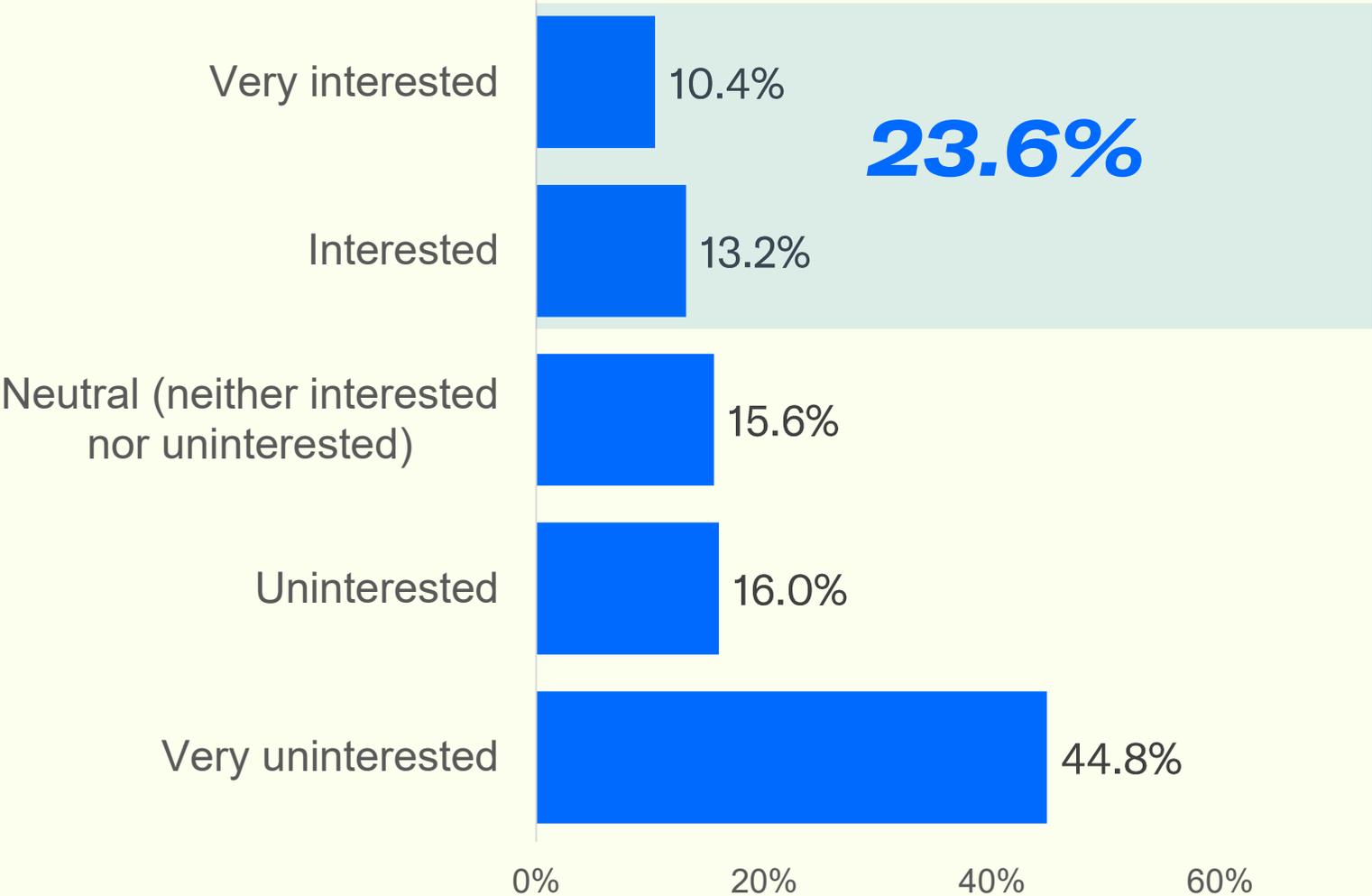


About One in Four Travelers are Interested in Taking a World Cup Trip

Question:

The FIFA World Cup men's soccer championship will be held next year in North America (USA, Mexico and Canada)?

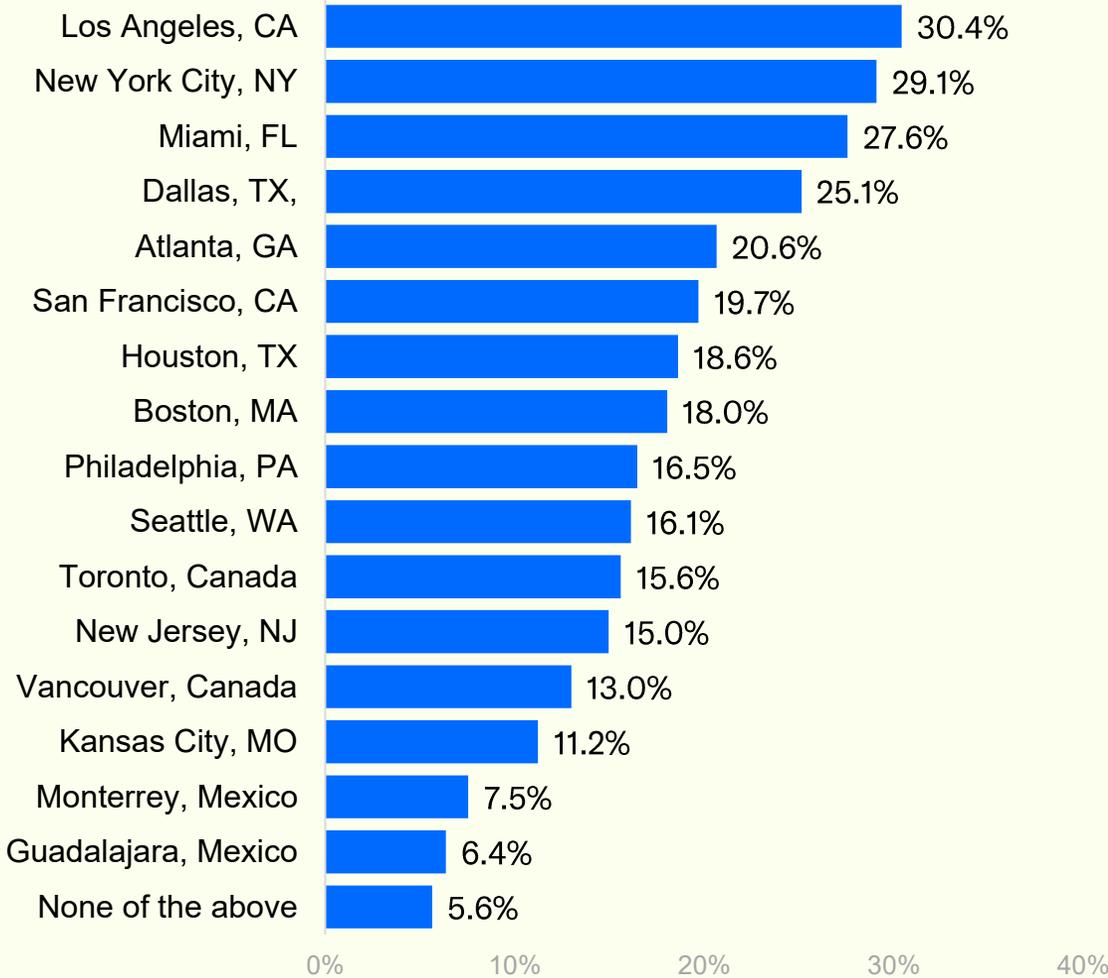
How interested would you be in traveling to experience FIFA World Cup games and events?



Coastal U.S. Cities Top the List of World Cup Destinations Travelers are Interested In

Question:

Which of the following destinations are you interested in traveling to attend a 2026 FIFA World Cup event(s) in the U.S.?

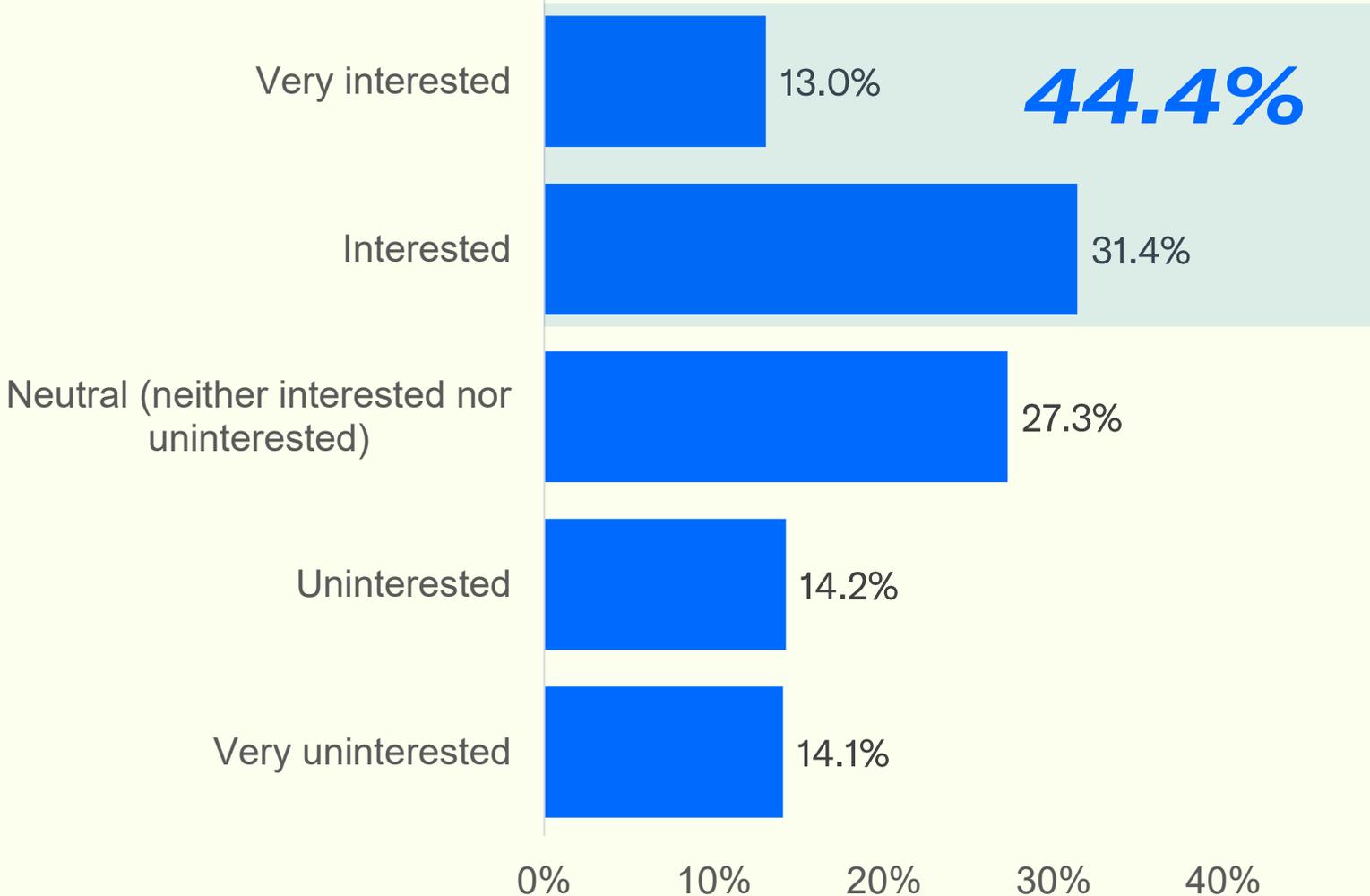


Interest is Higher for Traveling for Route 66 Centennial Celebrations

Question:

Route 66 is celebrating its centennial anniversary in 2026, marking 100 years since its establishment. Each of the eight states along Route 66 is planning its own celebratory events and activities, including car shows, festivals, and cultural experiences.

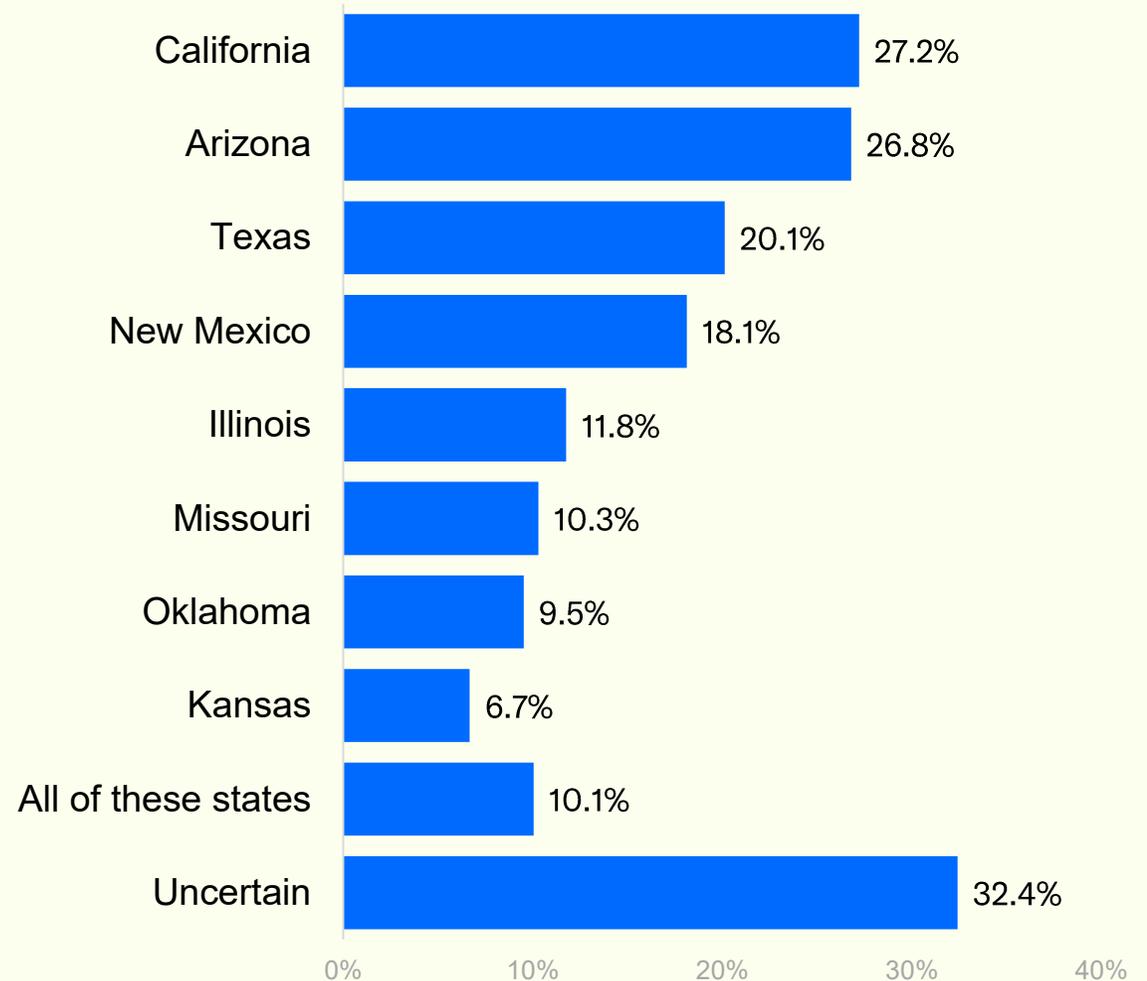
How interested would you be in traveling to enjoy these opportunities?



One-third of Route 66 Travelers are Still Deciding which Route 66 States to Visit

Question:

Which states would you be likely to visit on a Route 66 Anniversary trip?



Specialty Profiles

Profile Selector

Compare your target traveler with a Specialty Profile applied to reveal side-by-side differences and deeper traveler insights.

1. From the **Specialty Profile** menu, select an available profile.
2. Click a page link to open that section.
3. Select **Change Profile** to return here and choose a different profile or exit.

Recession-Proof Traveler

America 250 Traveler

FIFA World Cup 2026 Traveler

Route 66 Anniversary Traveler

LGBTQIA+ Traveler

Luxury Traveler

America 250 Traveler

Top 2 Box Likelihood - "I am likely to travel to an America 250 Event"



Demographics

Origin Markets

Trip Volume & Value

Planning & Booking Details

Travel Brands

Have an idea for a profile or page?
Share it with the Future Partners team.

America 250 Travelers: Younger Families, High Education

Home

SPECIALTY PROFILES

America 250 Traveler

← Change Profile

Demographics >

Origin Markets >

Trip Volume & Value >

Planning & Booking Details >

Travel Brands >

Support

Settings



Demographics

America 250 Traveler | Top 2 Box Likelihood - "I am likely to travel to an America 250 Event"

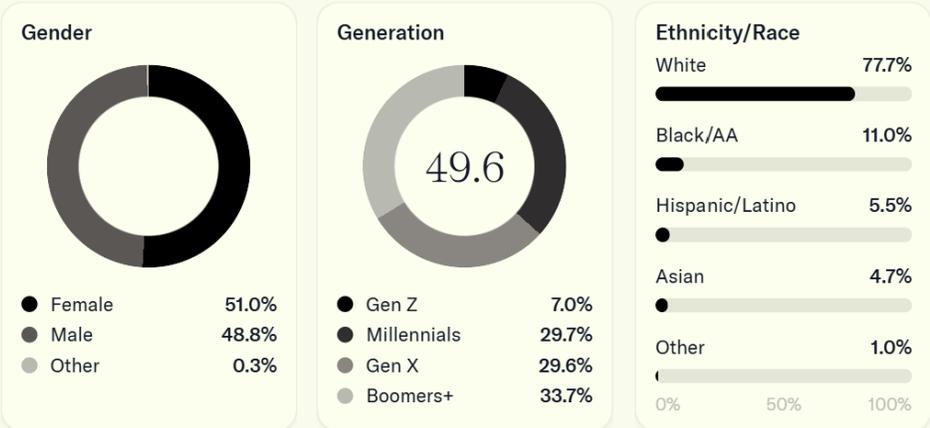
Year: 2025

Curated Collections: Total

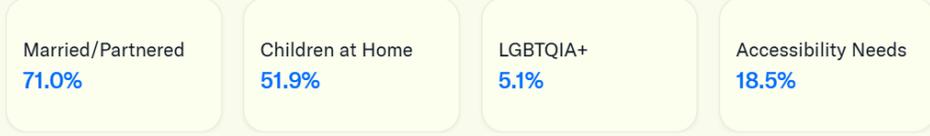
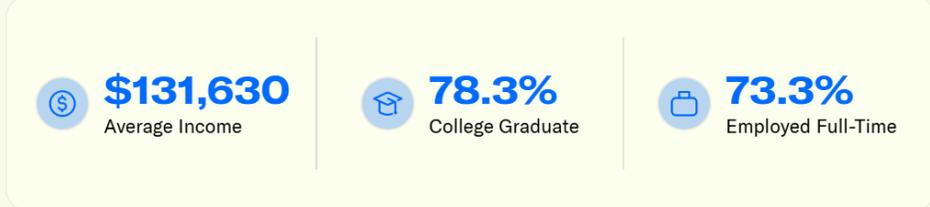
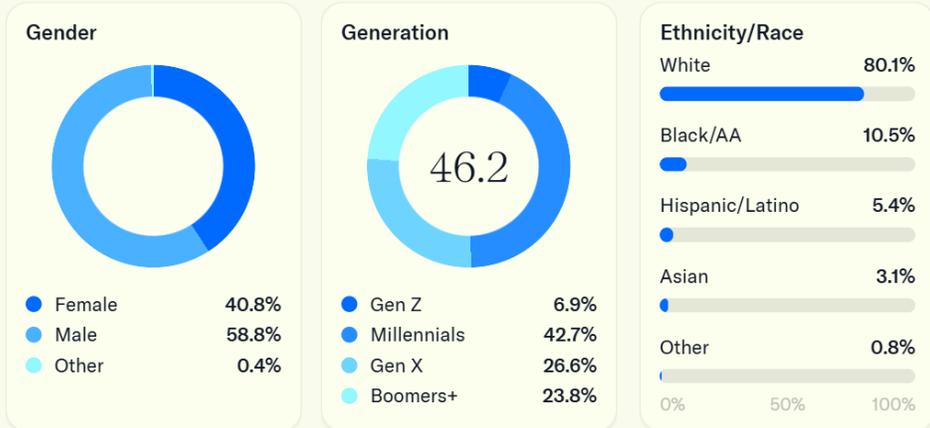
Filters: American Travelers

Total

American Travelers



America 250 American Travelers



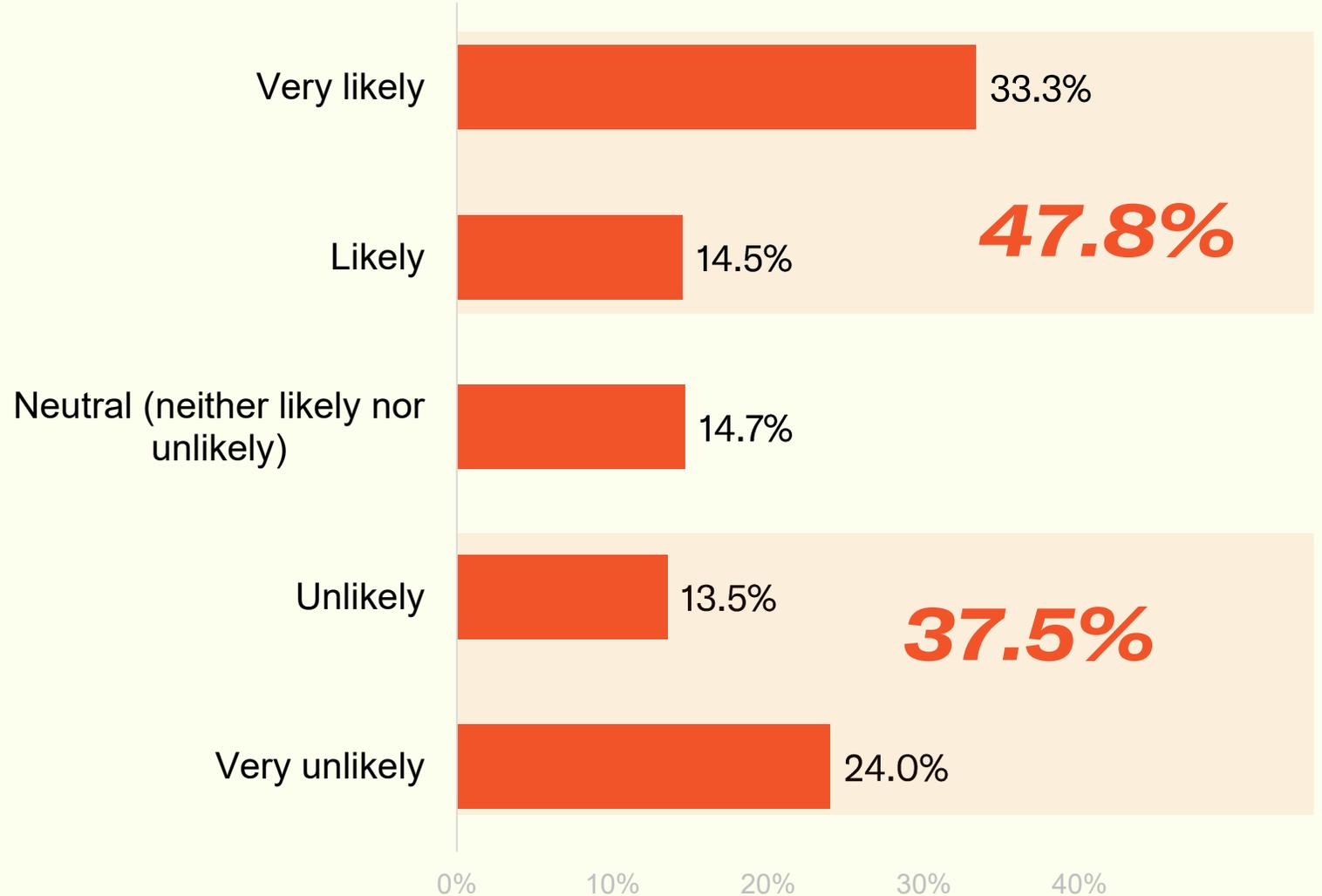


International Hotspots

Nearly Half of American Travelers are Likely to Travel Abroad in 2026

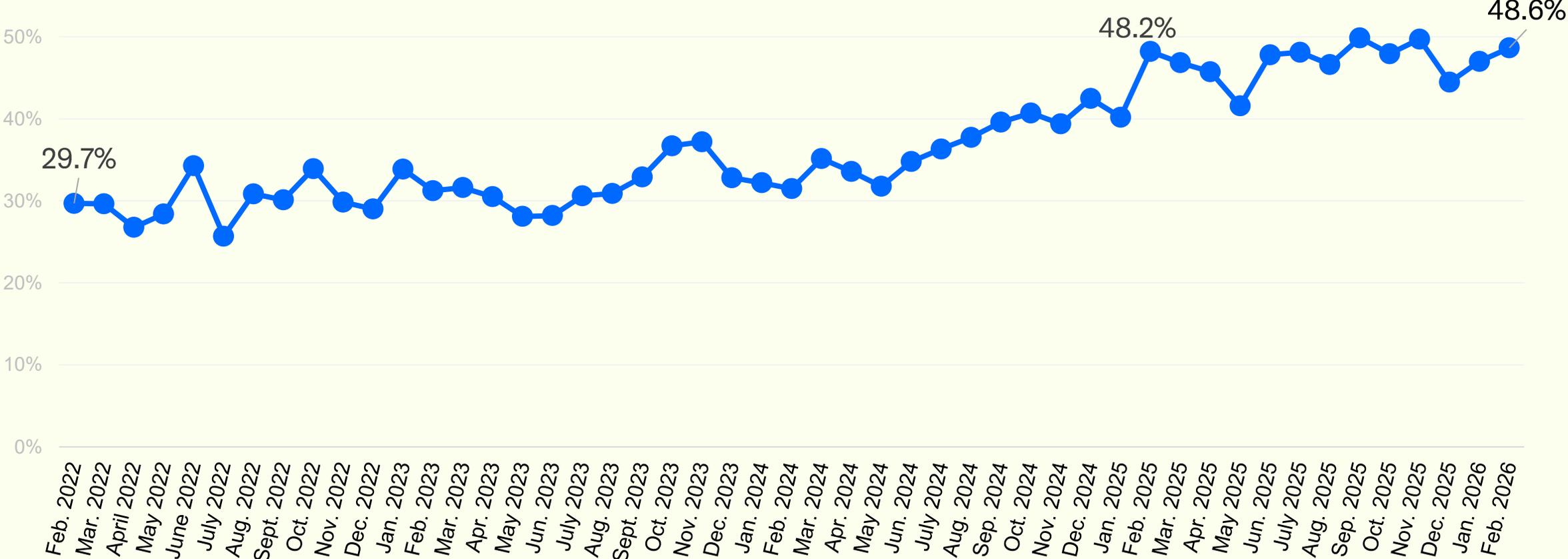
Question:

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



International Travel Intent Has Risen Sharply and Stayed Elevated

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

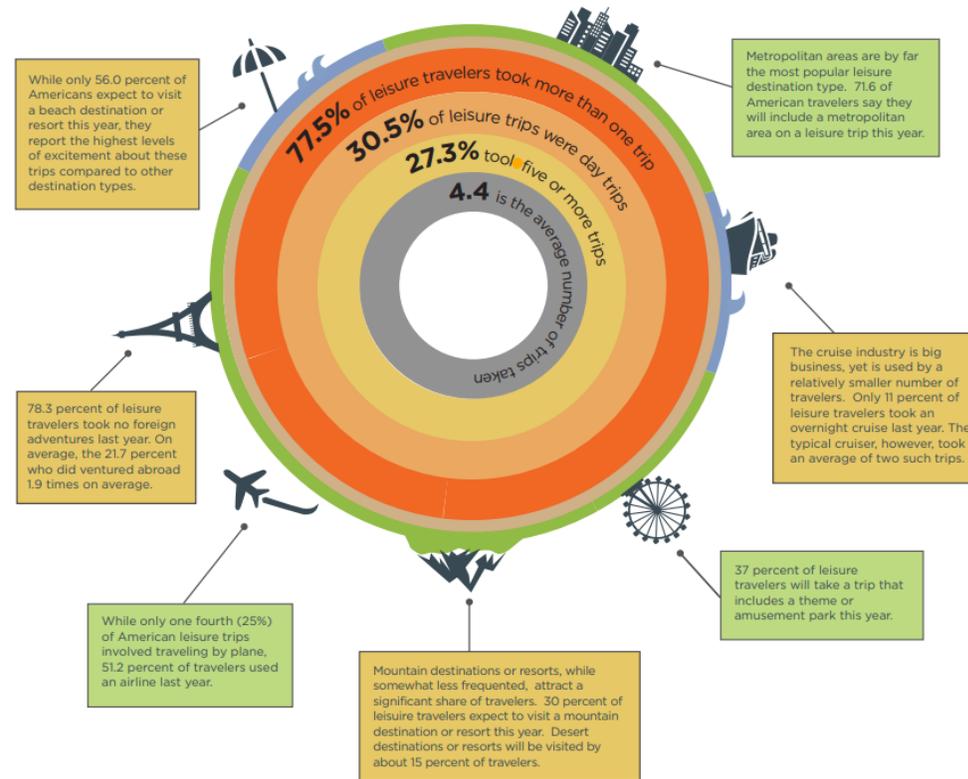


A Look Back:

2016

How do Americans Travel?

The vast majority of Americans are leisure travelers who have taken at least one trip (50 miles+ from home) in the past year. On average, Americans took 4.4 trips; with about one third taking five or more. Cities and metropolitan areas are by far the most visited destination type, with nearly three out of four of us planning to visit one this year. The second most frequented destination type will be "small towns, villages or rural destinations/attractions," with the average traveler visiting 1.1 such places in 2016. Beach destination and resorts will generate fewer visits, but still more than half of Americans will include them in our 2016 itineraries. Below are some fun facts on how Americans got away last year and how we plan to travel in 2016.



METHODOLOGY: The State of the American Traveler Survey is conducted every six months by Destination Analysts, Inc, a San Francisco-based tourism industry research company. The survey is conducted online amongst a nationally representative sample of adult Americans. From January 4th to 10th, 2016, surveys were collected from a group of respondents who were then screened by their leisure travel behavior. Only those respondents who had traveled at least once in the past 12 months for purely leisure or personal reasons were interviewed. This travel must have been of at least 50 miles one-way — the standard distance threshold used in the tourism industry to signify that a "trip" has been taken. In total, 2,010 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.19%. This information is provided "as is" and intended for informational purposes only. It should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Destination Analysts is not responsible for your use of the information contained herein (including errors, omissions, inaccuracy or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.

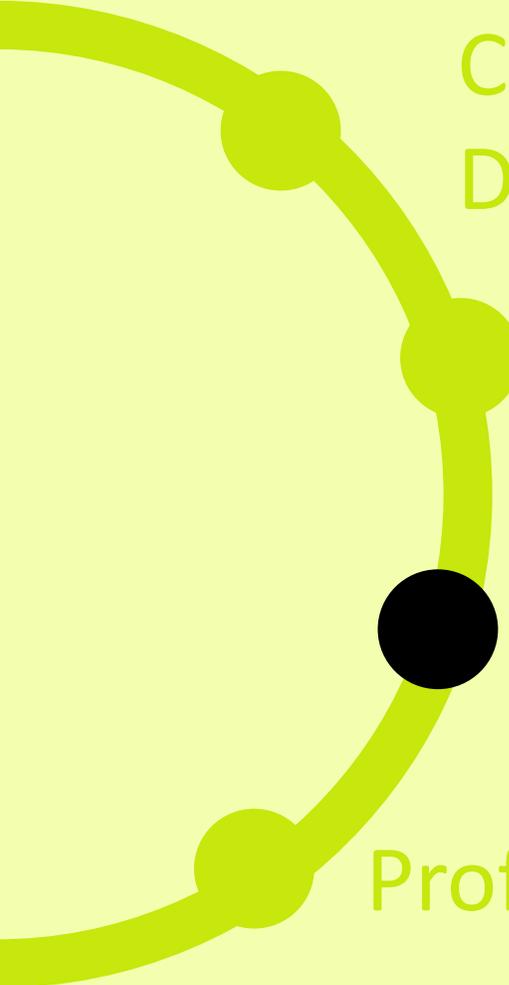
Top 15 International Destinations Americans Want to Visit in the Next 12 Months

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)



Today's Agenda



Current Travel Sentiment Framing Destination
Decisions

Trip Motivators and Destination Drivers

**Where Destination Decisions Get Influenced:
Media and Travel Tools**

Profile of Off-Season and Dispersal Travelers

Where travelers discover destinations has shifted — but not entirely to new resources. Online search leads as the most receptive channel, email is a close second, and AI is the only planning tool growing across every market.

A Look Back:

2016

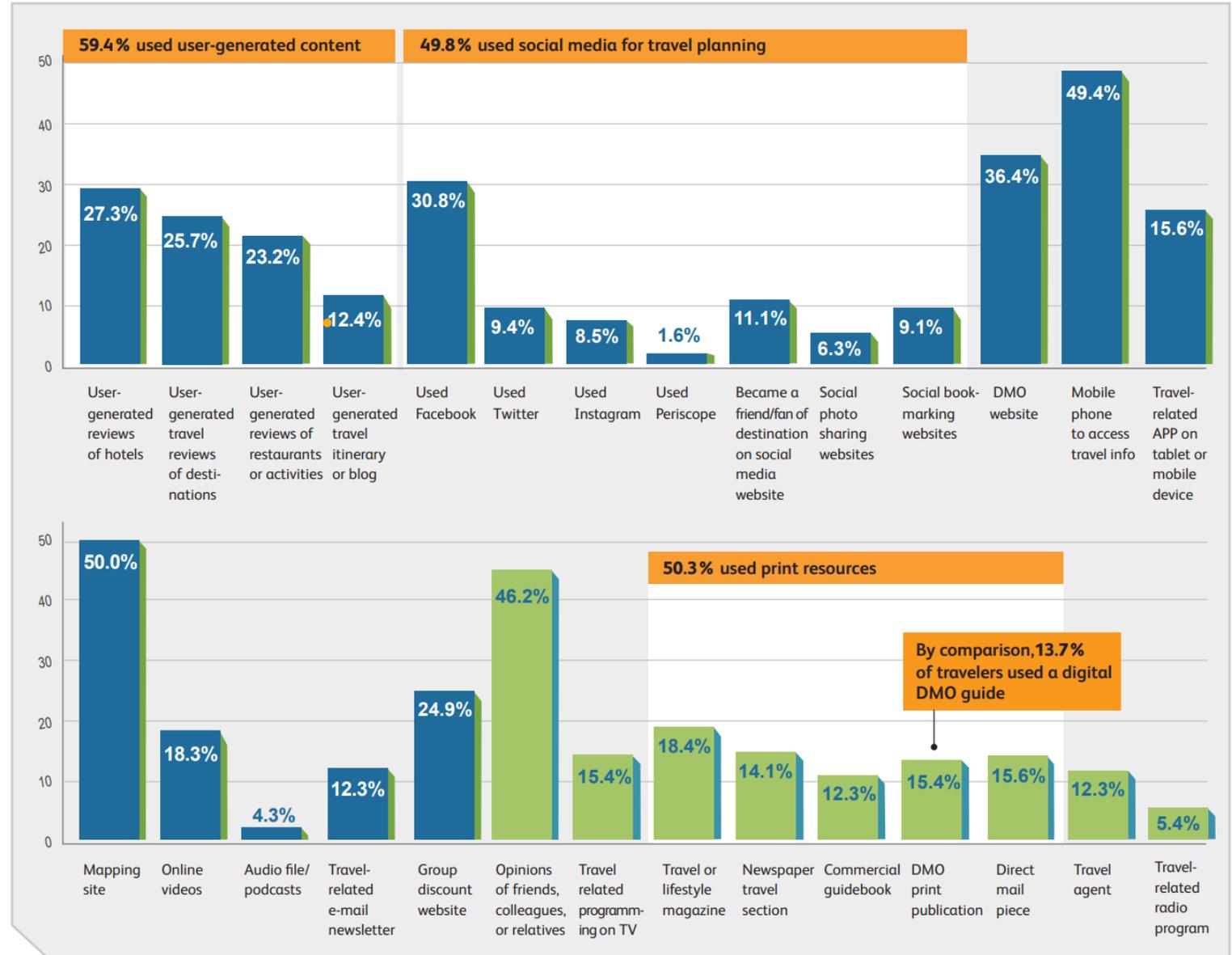
Future Partners

Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

Q In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)

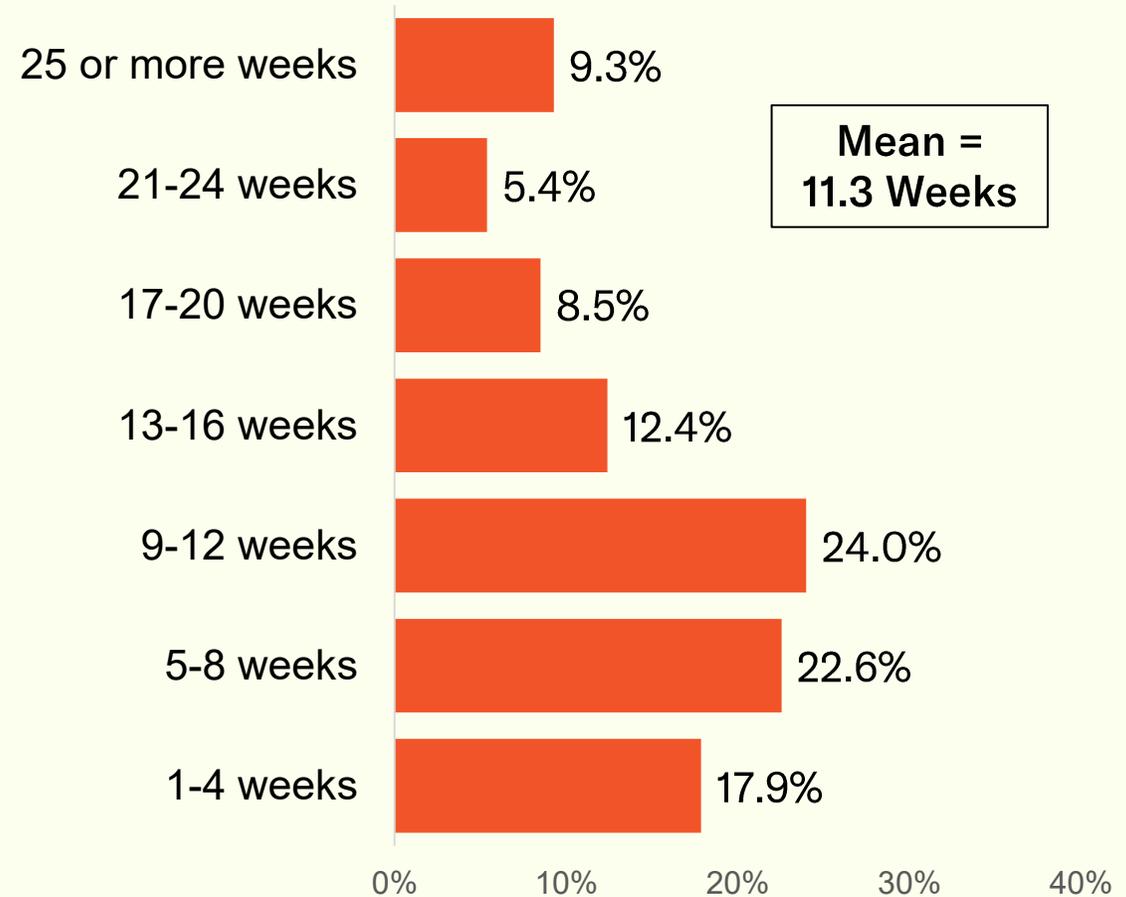
● ONLINE
● OFFLINE



Roughly Two-thirds of American Travelers Would Spend Three Months or Less Planning a Domestic Leisure Trip

Question:

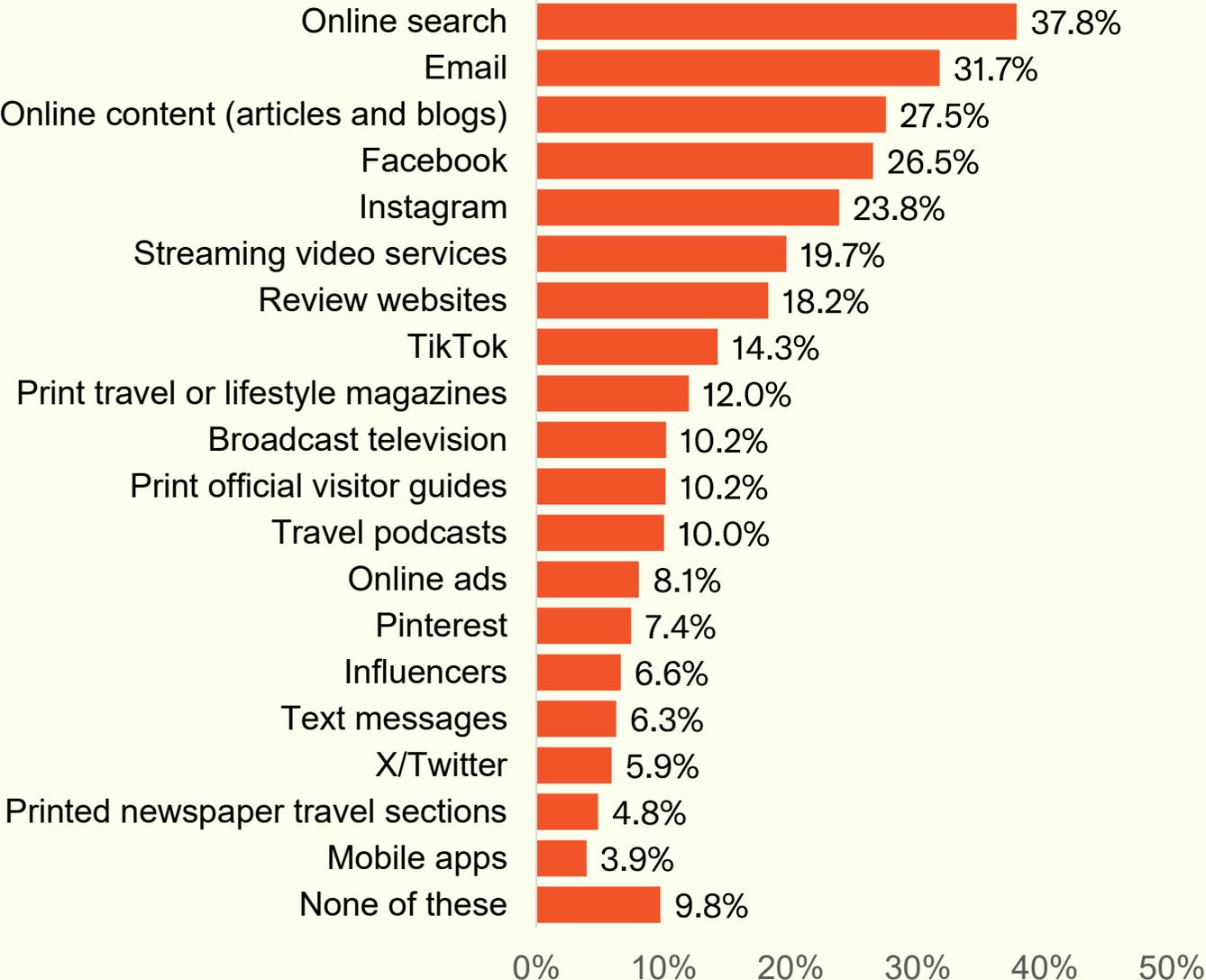
How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



Online Search Still Leads as the Top Channel for Destination Marketing

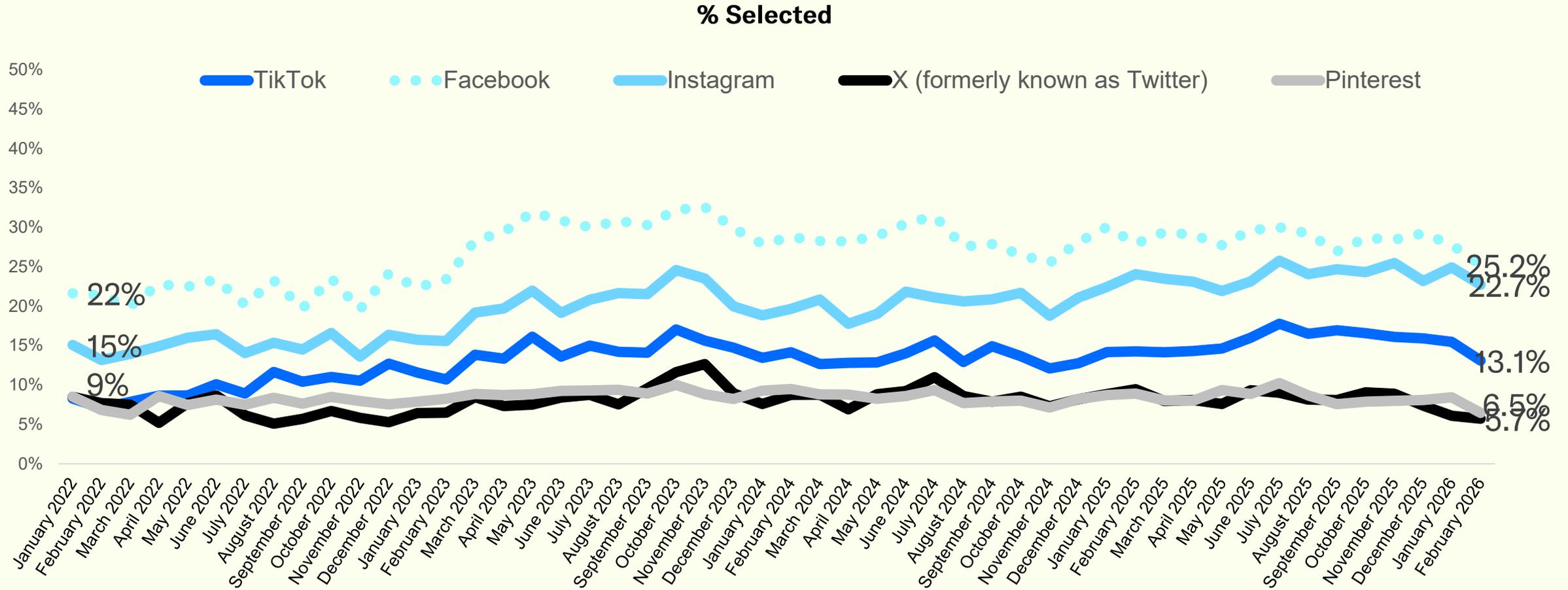
Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



Social Media as a Destination Inspiration Sources 2022-2026

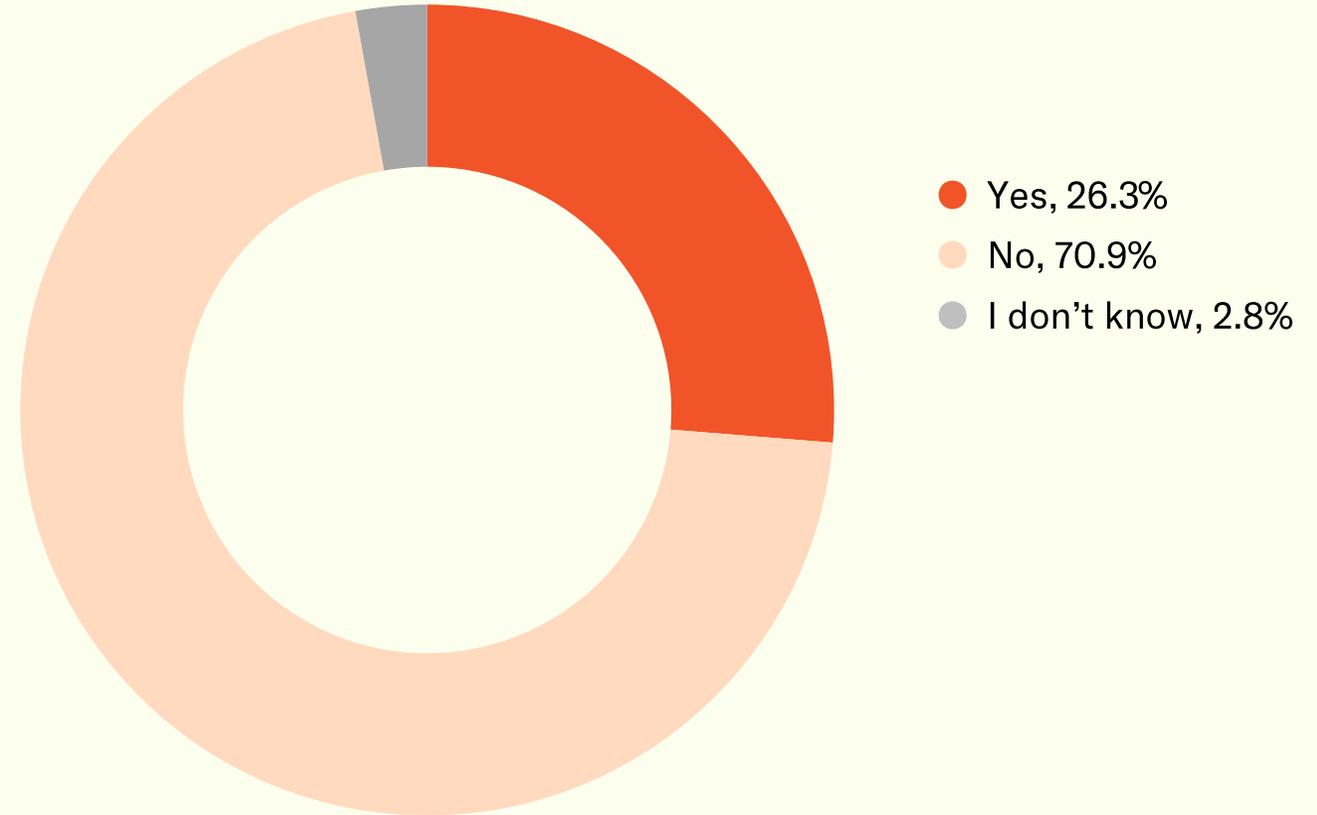
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



More than a Quarter of American Travelers Have Used AI to Plan Trips in the Past Year

Question:

In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Media, Inspiration & Planning by Destination Type



Beach

Low-effort inspiration, low-friction planning



City

High-information, high-inspiration travelers



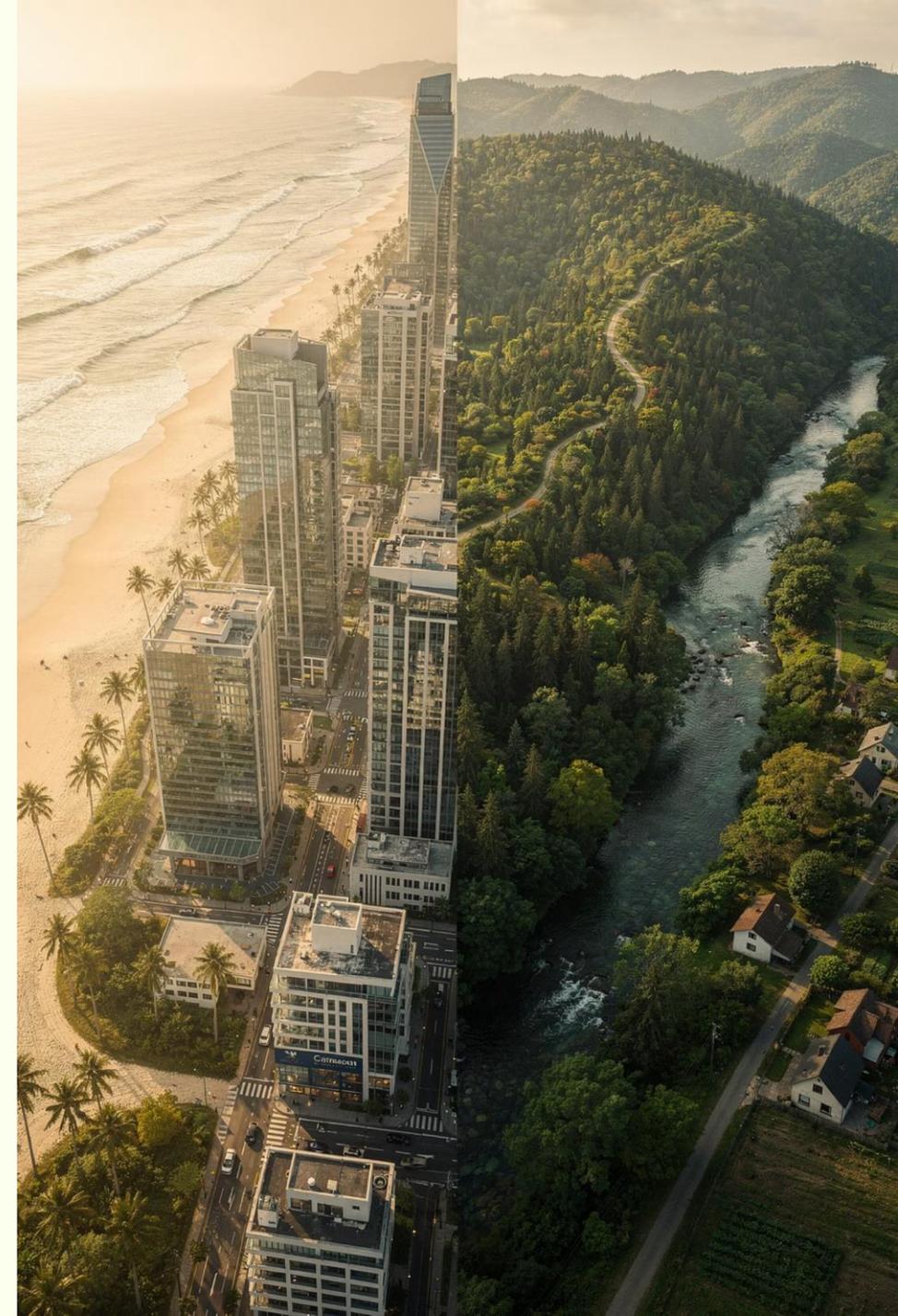
Nature / Park

Intentional, research-driven planners



Small Town / Rural

Discovery + trust-driven planning



Beach Travelers

Low-effort Inspiration, Low-friction Planning

◆ Top Inspiration Sources

- Friends & family recommendations (very high)
- Social media (Instagram, TikTok)
- Travel deal sites

Heavily driven by: *"That looks relaxing / I heard it's great"*

◆ Media Patterns

Visual-first:

- Instagram
- TikTok
- Influencer content performs well
- Less research-heavy content

◆ Planning Resources

- OTAs (Expedia, Booking, etc.)
- Package deals
- Airline + hotel bundles

Planning style: **Fast, simplified, price-aware**



City Travelers

High-information, High-inspiration Travelers

◆ Top Inspiration Sources

- *Online research (Google, travel guides)*
- Social media
- Travel websites / editorial content

Driven by: *"What's there to do? What's trending?"*

◆ Media Patterns

Mix of:

- Social (discovery)
- Search (validation)

Heavy use of:

- Lists
- "Top things to do"
- Food/travel content

◆ Planning Resources

Multiple platforms used:

- Google search
- Review sites (TripAdvisor, Yelp)
- Maps
- Less reliance on packages

Planning style: *Iterative, research-heavy, optimized*

Key Insight

City travelers are: ***Active planners and information maximizers***

Nature/Park Travelers

Intentional, Research-driven Planners

- ◆ Top Inspiration Sources
 - **Word of mouth (trusted sources)**
 - Travel long-form content
 - Search (destination-specific research)

Driven by: *"I want to go somewhere meaningful"*

- ◆ Media Patterns
 - Less social-driven
 - More: YouTube, Blogs, Guides
- ◆ Planning Resources
 - **Direct research (park sites, official resources)**
 - Itinerary planning tools
 - Maps, logistics-heavy tools

Planning style: **Deliberate, detail-oriented, effort-accepting**

Small Town / Rural

Discovery + Trust-driven Planning

- ◆ Top Inspiration Sources
 - **Word of mouth (very high)**
 - "Hidden gem" content
 - Social (but less influencer-heavy)

◆ Media Patterns

Discovery-oriented:

- Blogs
- Niche content
- Less mainstream travel media

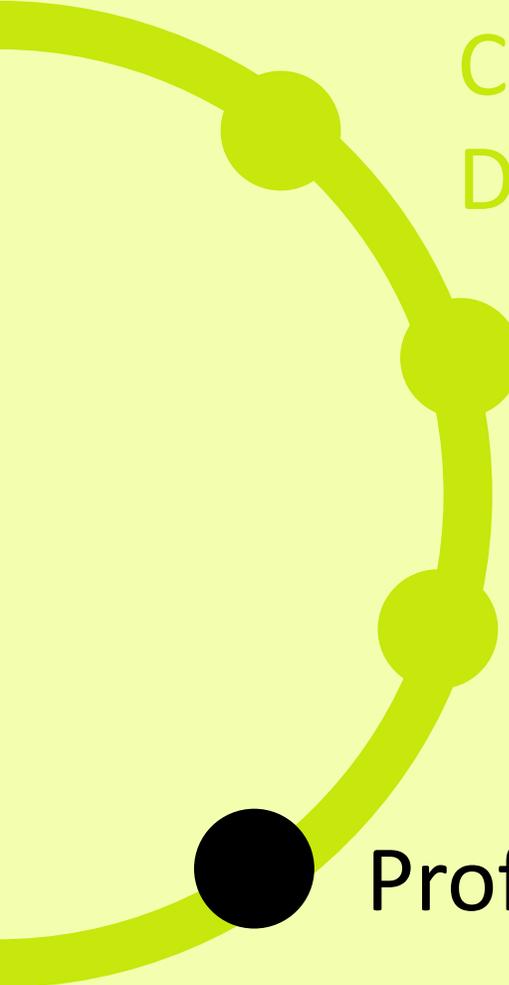
◆ Planning Resources

Mix of:

- OTAs (for basics)
- Direct/local research

Planning style: **Light planning, but curiosity-driven**

Today's Agenda



Current Travel Sentiment Framing Destination
Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced:
Media and Travel Tools

Profile of Off-Season and Dispersal Travelers

Off-Season Travelers

- Took at least one overnight leisure trip during the off-season in the past 12 months
- 85.6% of off-season travelers have also taken trips during the peak season

Peak Season Travelers

- Took at least one overnight leisure trip during the peak season in the past 12 months AND did not take any overnight leisure trips during the off-peak season in the past 12 months

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Dispersal Travelers

- Traveled to lesser-known destinations or attractions in the past 2 years for at least some of their trips

Non-Dispersal Travelers

- Did not travel at all to lesser-known destinations or attractions in the past 2 years

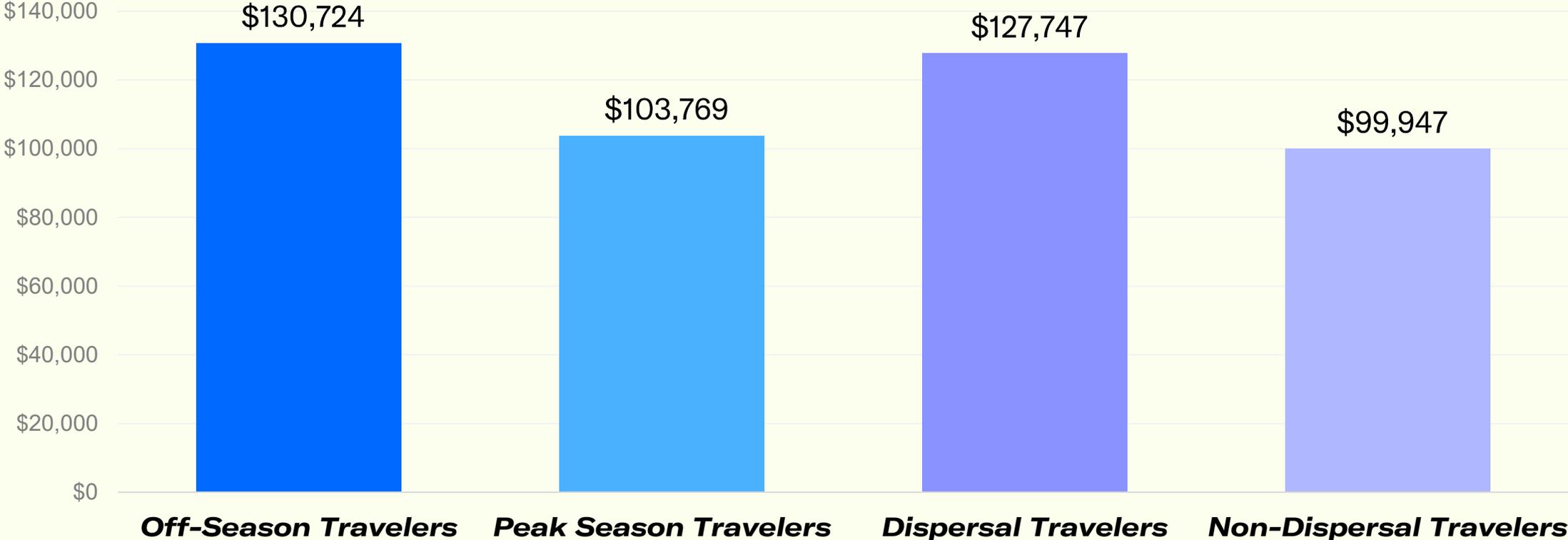
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Off-Season and Dispersal Travelers Report Higher Average Household Incomes

Question: Which best describes the combined annual income of all members of your household?

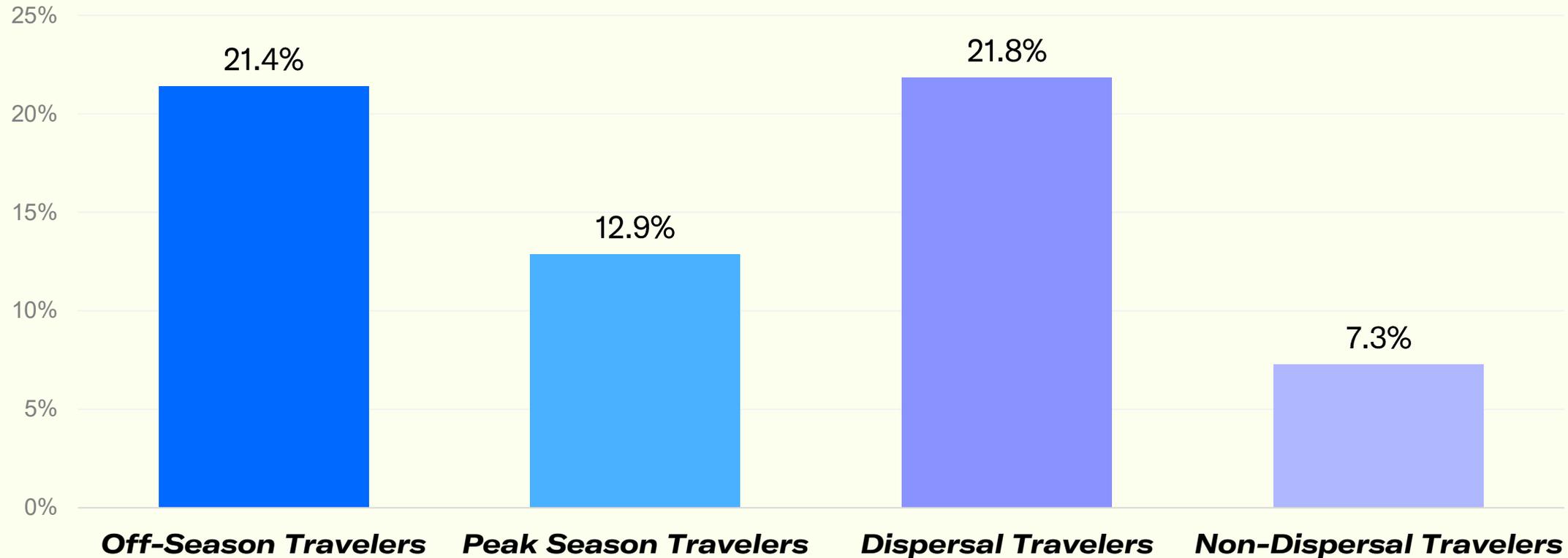
Average Annual Household Income



Dispersal and Off-Season Travelers are More Likely to Frequently Take Spontaneous Leisure Trips

Question: How often do you take spontaneous leisure trips (i.e., trips sparked by impulse which begin soon after the idea arises)?

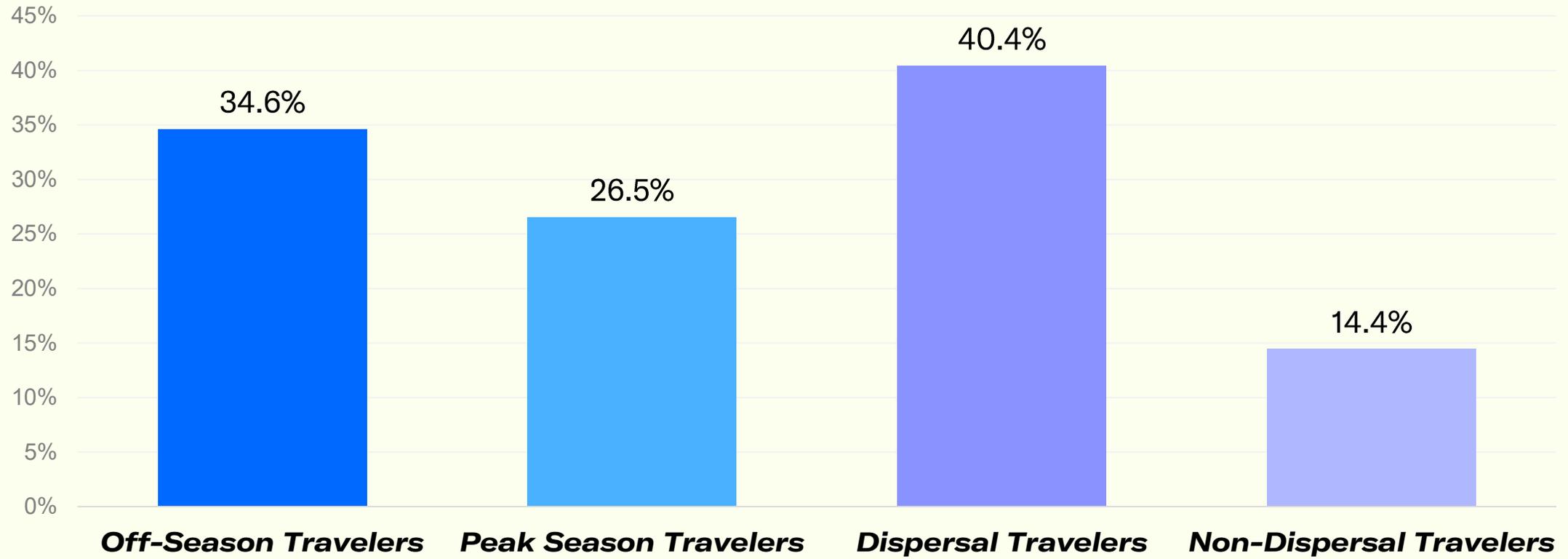
% Very Frequently or Frequently



Dispersal and Off-Season Travelers are Much More Adventurous

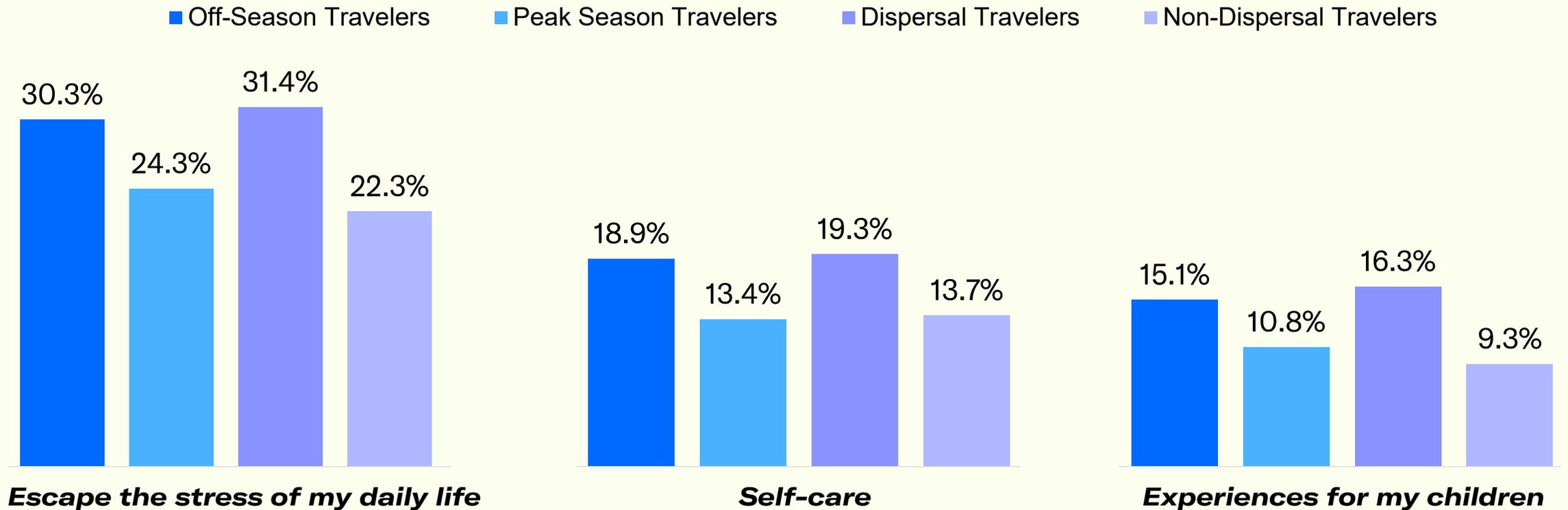
Question: How adventurous do you consider yourself to be while traveling?

% Extremely Adventurous or Very Adventurous



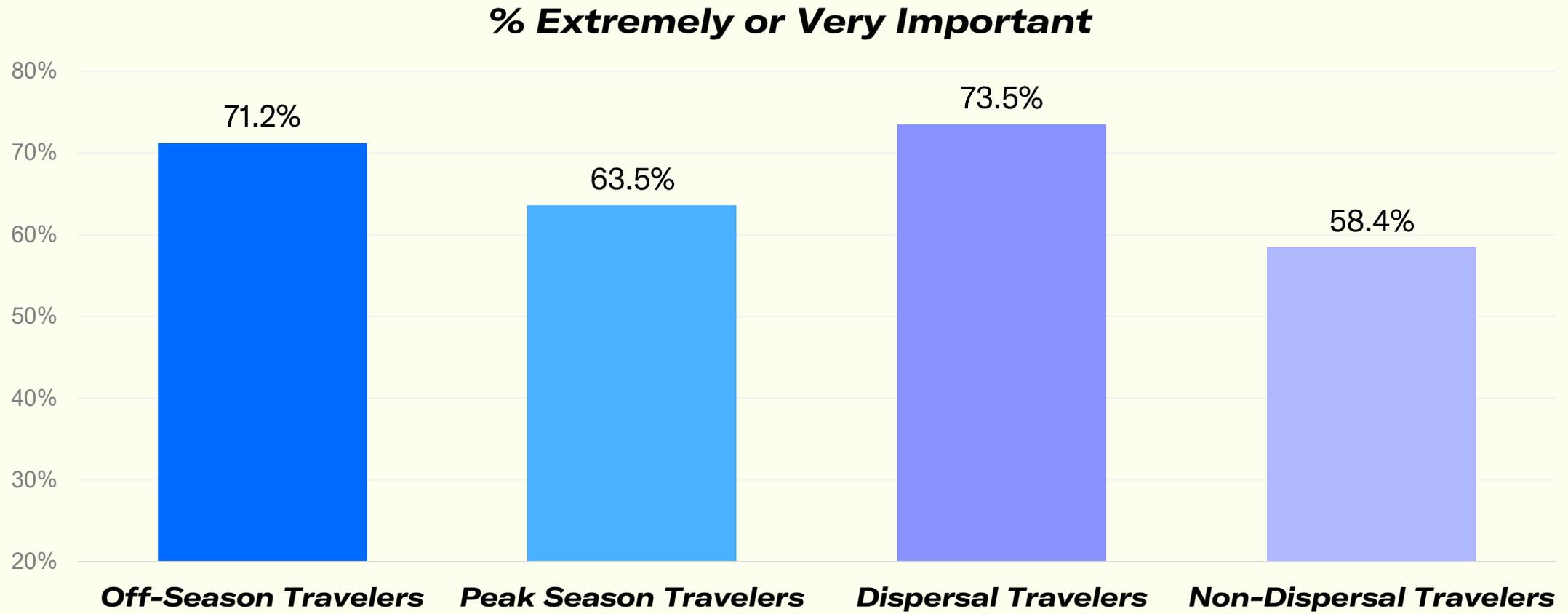
De-stressing, Self-care, and Children's Experiences Drive their Destination Decisions

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?



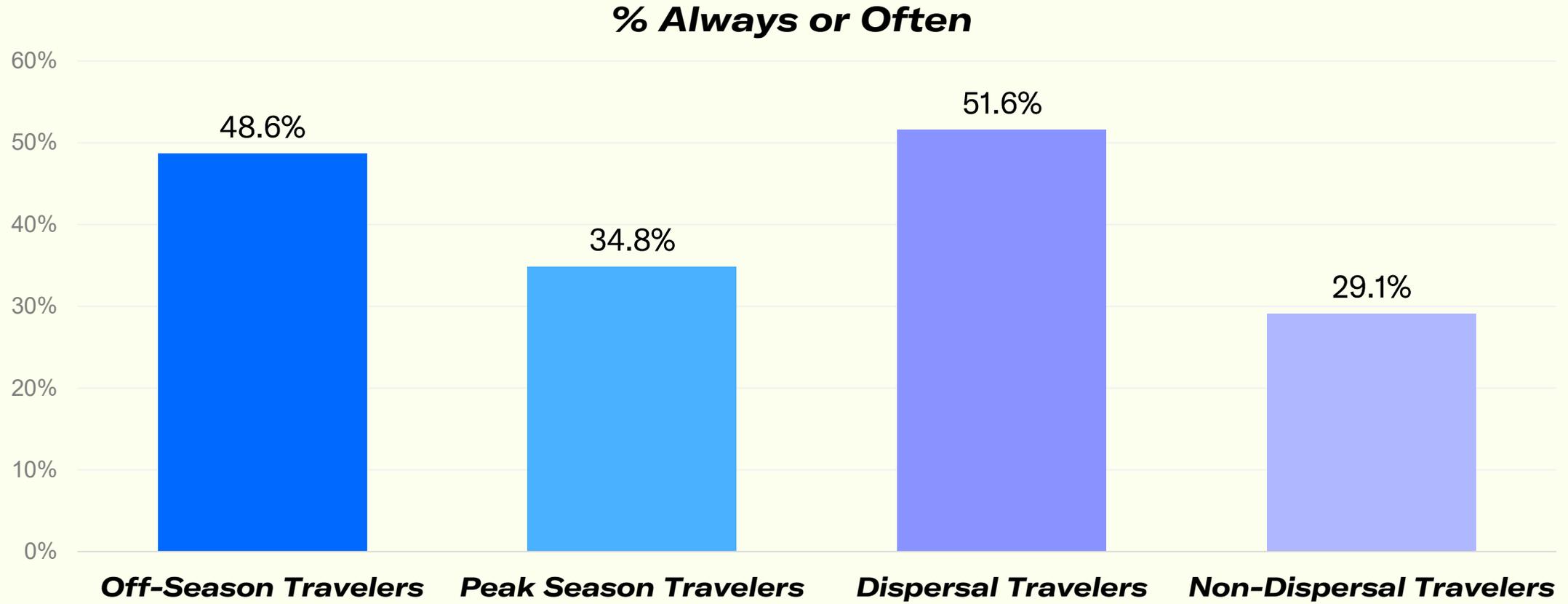
Off-Season and Dispersal Travelers See Travel as Key to Holistic Wellness

Question: Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)



More Than Half of Dispersal Travelers Regularly Plan Leisure Trips Around Supporting their Well-Being

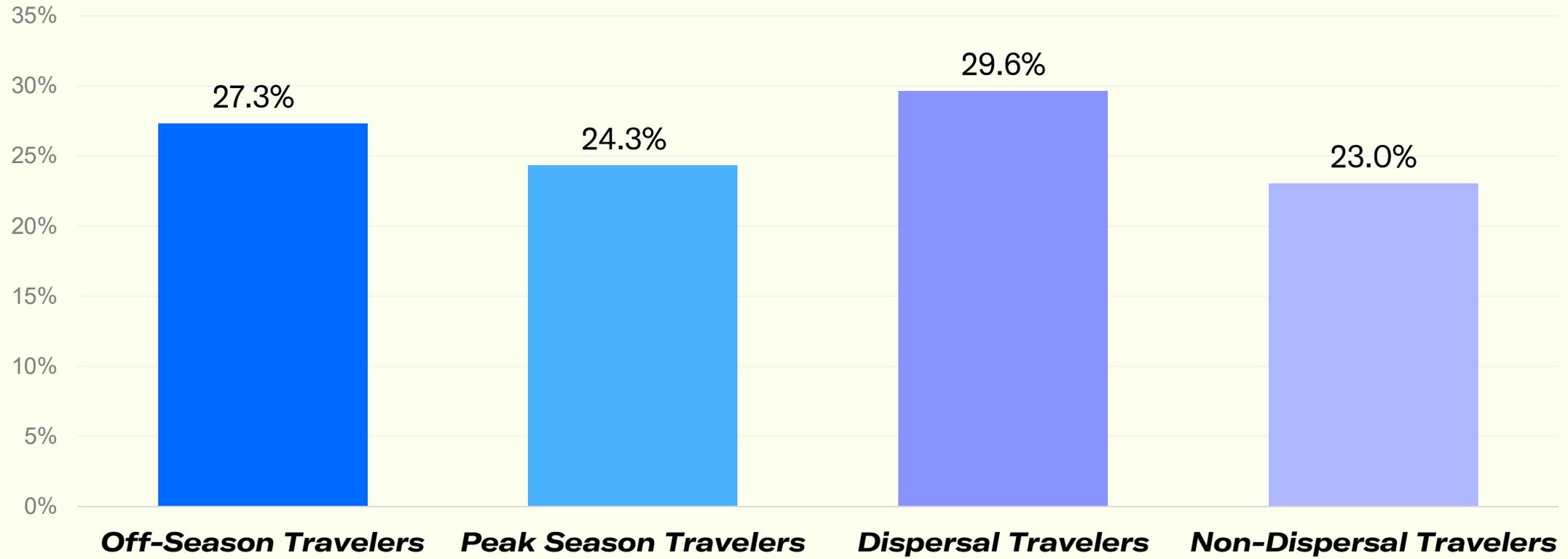
Question: How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?



Dispersal Travelers are Most Likely to Cite the Cost of Airfare as a Travel Barrier

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)

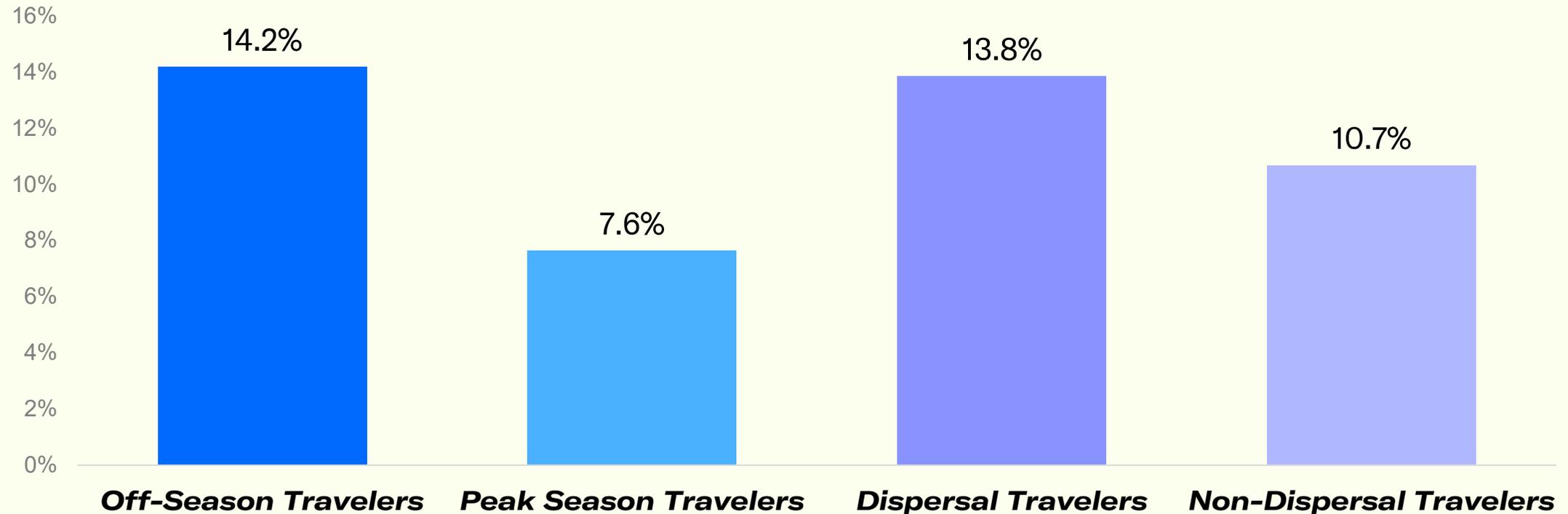
% Airfare is Too Expensive



Off-Season Travelers were Most Likely to Report Crowding as a Travel Barrier

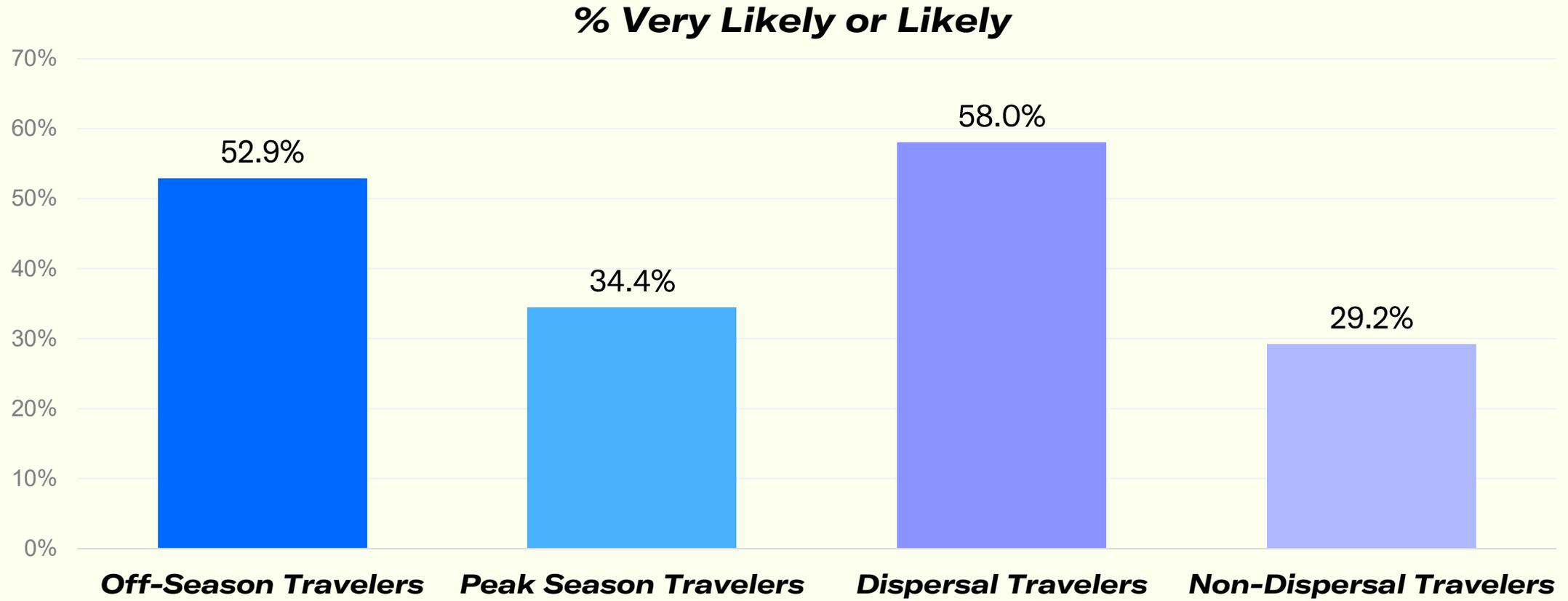
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

% Crowds / Too Many People



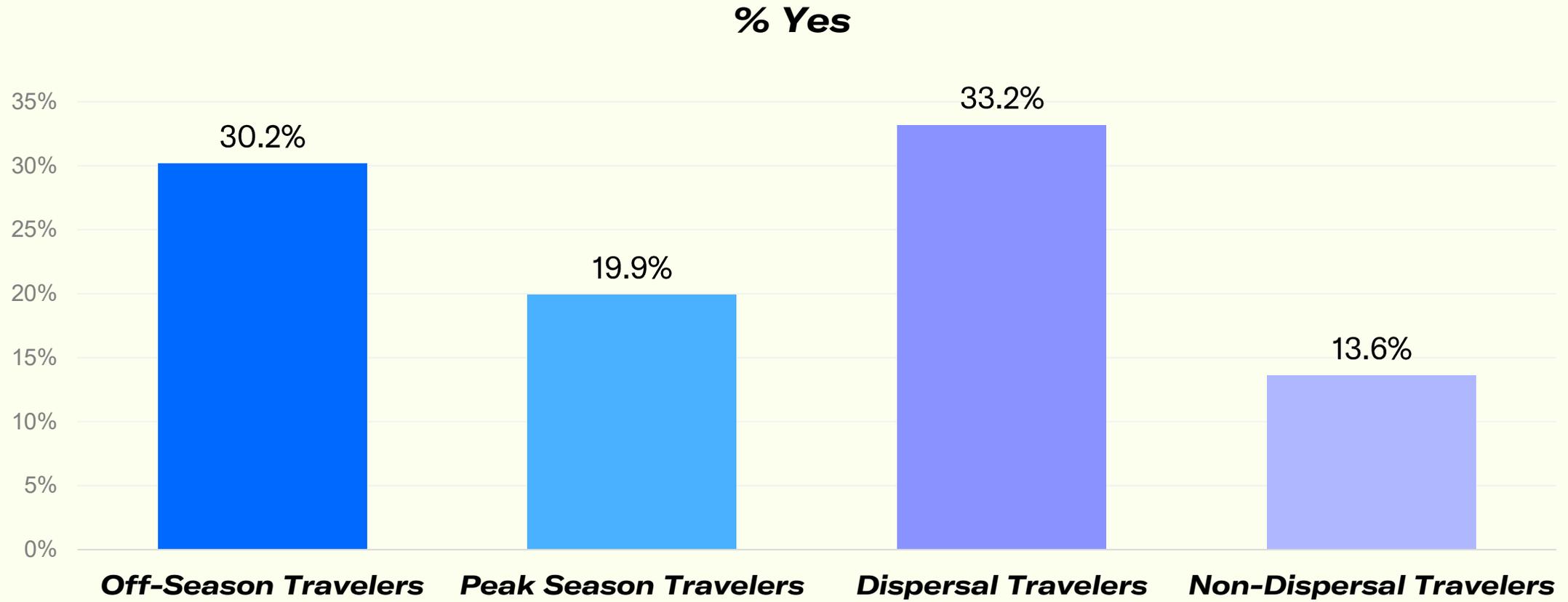
Dispersal and Off-Season Travelers are Looking at International Travel at a Much Higher Rate

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



Usage of AI Tools for Trip Planning is Higher among Dispersal and Off-Season Travelers

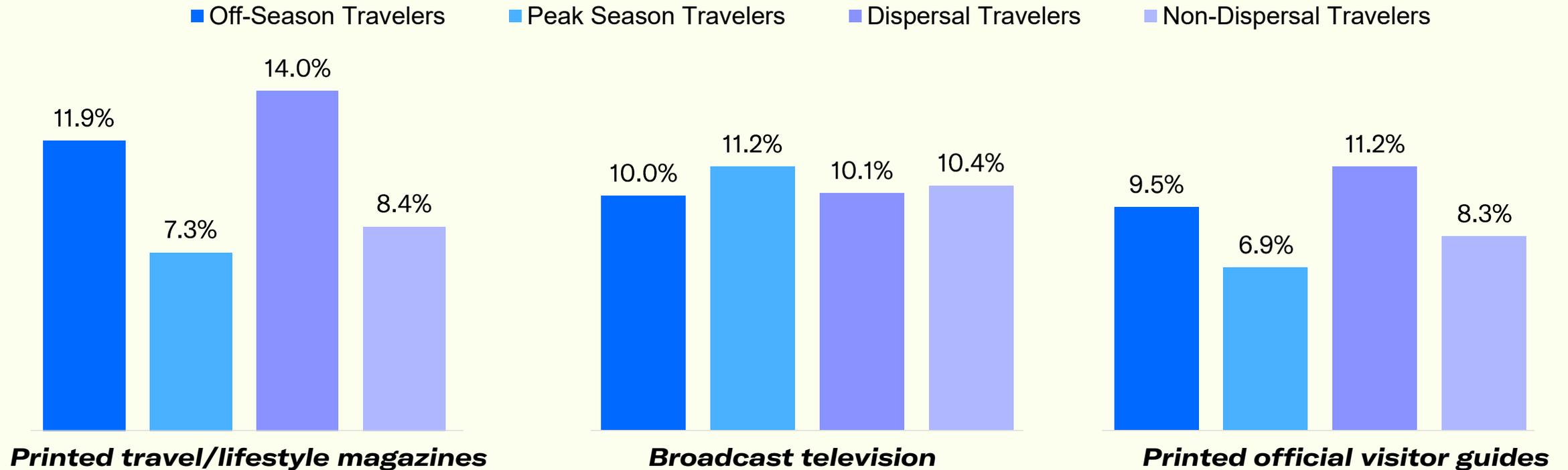
Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Off-Season and Dispersal Travelers are More Likely to be Receptive to Travel Ads in Print Magazines and Visitor Guides

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



In Summary

Demand is strong but the competition for it has never been fiercer. Trip volume and budgets are at post-pandemic highs, yet nearly half of American travelers are also likely to travel internationally this year. Domestic destinations are competing not just with each other, but with Italy, Japan, and the greater world. Financial caution makes travelers more deliberate

Destinations compete on identity, not simply experiences. Travelers choose places that let them be the version of themselves they want to be on vacation. Lead with who your visitor becomes when they're there, not just what they can see and do.

Generation is amongst the greatest predictors of where travelers want to go. Gen Z gravitates toward New York at nearly double any other generation. Millennials over-index for Las Vegas. Gen X for Orlando. Boomers for history and depth. Knowing which generation you're targeting isn't just a media decision, it's a destination positioning decision.

High-value Off-Season and Dispersal travelers are actively looking for somewhere worth discovering that supports their wellness. Off-season and dispersal travelers earn \$27,000–\$31,000 more per household than their counterparts and they are explicitly seeking destinations that feel different, authentic, and restorative. Lean into what makes you fascinating and emotionally rejuvenating.

AI discoverability is critical. Over a quarter of American travelers have already used AI to plan trips and that number skews heavily toward the most valuable segments.

Future Partners



The State of the American Traveler

Welcome back, Future Partners!



Sign Up For Your
Demo & Trial of

***The State of the
American Traveler
Insights Explorer***



***Tune into our
Monthly Webinar
Series for the
Latest on American
Travel Sentiment
& Behaviors***



Livestream Calendar

The State of Artificial Intelligence in Travel

2026 Insights Report

Future Partners

miles
PARTNERSHIP



Veo

2026 Phase I Research

High Value Traveler Research



Custom Research Led by Miles Partnership in collaboration with Future Partners, Purdue University & Other Partners



Future Partners

SURVEY

Thinking about visitor volume and spending in your destination, how many months in a typical year would you consider the off-season?

Single choice

- **1 month or less**
- **2-4 months**
- **5-7 months**
- **8+ months**
- **Not sure/Don't know**

Panel Discussion

Off Season & Off-the-Beaten Track Marketing

Today's Panel



Carolann Ouellette

*Director of Tourism, Film &
Outdoor Recreation,
Maine Department of
Economic & Community
Development*



Heath Dillard

*President & CEO,
VisitGreenvilleSC*



Racene Friede

*President & CEO,
Western Montana's
Glacier Country*



Maine Office of Tourism

WHEN STEWARDSHIP MEETS BRAND

MAINE.

March 24, 2026

It all started 5 years ago

- In 2021, MOT partnered with **Coraggio Group** on a strategic **Destination Management Plan**
- Initial work uncovered a need to make a shift in the mission of the Maine Office of Tourism

Old Mission <i>Maine Office of Tourism</i>	NEW Mission <i>Maine Office of Tourism</i>
Become the premier four-seasons destination in New England	The Maine Office of Tourism markets the state in ways that work to preserve and celebrate the authentic character of Maine and fosters collaboration to pursue economic vitality

A Shift in Mission Requires a Shift in Marketing



Extended into Fall
Shoulder Season



Expanded Reach
Nationally



Balanced
Locations +
Experiences



Alignment with
Content Partners



Broader
Representation

Reworked Measures of Success

MAINE.

DESTINATION MANAGEMENT PLAN

For Maine to remain a premier destination for visitors, it must sustain quality of life for its residents. Seasonal visitation and lack of easy access to many parts of the state threaten the state's economy and require action.

Initiatives

- 1.1 Amplify the essence of Maine to attract travelers who are best aligned to Maine's experiences and ethos.
- 1.2 Invest in marketing intelligence to improve effectiveness and enhance return on investment.
- 1.3 Prioritize diversification of travelers to and within Maine.

Measures of Success

- » Increased length of stay
- » Increased per visitor spend
- » Increased diversity of visitors
- » Increased shoulder season and off-season visitation



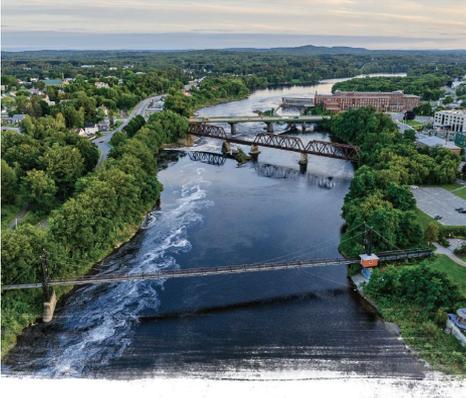
MAINE.
VISITMAINE.COM

Maine 2025 Statewide Report

12

DS downs & st. germain
RESEARCH

Prioritizing Values–Aligned Travelers



MAINE.

Maine Office of Tourism
Destination Management Plan
2025 Reset:

A 5-Year Strategy for Marketing & Management



VALUES-ALIGNED TRAVELERS:

Maine seeks out and welcomes visitors who demonstrate stewardship, appreciation and care for Maine's people, landscapes and industries.

Values-Aligned Travelers come from diverse backgrounds, all income levels and interests and positively contribute to all parts of Maine.

MOT's marketing is designed to match visitors with the experiences across the state that benefit and enrich both the visitor and the community.

Creation of an Authentic Brand Story



**THANK
YOU.**

MAINE.



VISIT
GREENVILLE
SC

Off-Season Marketing

March 2026



What if the opportunity isn't just demand... but the product?

Dec & Jan are our biggest occupancy gap with families ranked as our top converting visitor.

Families aren't just choosing destinations - they're choosing experiences worth the trip.

So we asked: What would make someone choose Greenville in the off-season?



The “Home Alone” Experience

A bookable, limited-time experience:

- Westin Poinsett Suite
- In-Room Ice Cream Sundae
- Limo Ride with Pizza
- Shopping Spree at Toy Store
- Free Turtle Dove Ornaments

Results:

- Bookings sold out in 2 weeks
- Continues to drive demand 3 years later
- National & Local PR AVE: \$537K

Key Takeaway:

We didn't promote winter.

We gave people a reason to come in winter.



Yes Day in Greenville, SC

A 24-hour, family-focused experience where kids lead the day, Jan-Feb only.

Built with Partners:

- 5 Hotel Packages
- 18 Attractions & Restaurants
- Free Activities + Planning Resources

Results:

#1 Source of Lodging Referrals in Jan/Feb

Key Takeaway:

We're not just promoting trips; *we're helping build them.*



Tourism Product Development Learnings

DMOs don't have to own every experience, but we can facilitate and shape them.

DMO Role:

- Create ideas that are ownable + PR-worthy
- Package partners into bookable experiences
- Support and scale what works

Key Takeaway:

Shoulder season isn't just a marketing challenge. *It's a product opportunity.*



An aerial photograph of a scenic waterfall and river. The water flows over large, reddish-brown rocks, creating a series of cascades. A paved walkway with a metal railing runs along the left side of the river, where several people are walking. The surrounding area is lush with green trees and vegetation. The overall scene is bright and clear, suggesting a sunny day.

VISIT
GREENVILLE
SC

**THANK
YOU**



**WESTERN MONTANA'S
GLACIER COUNTRY**

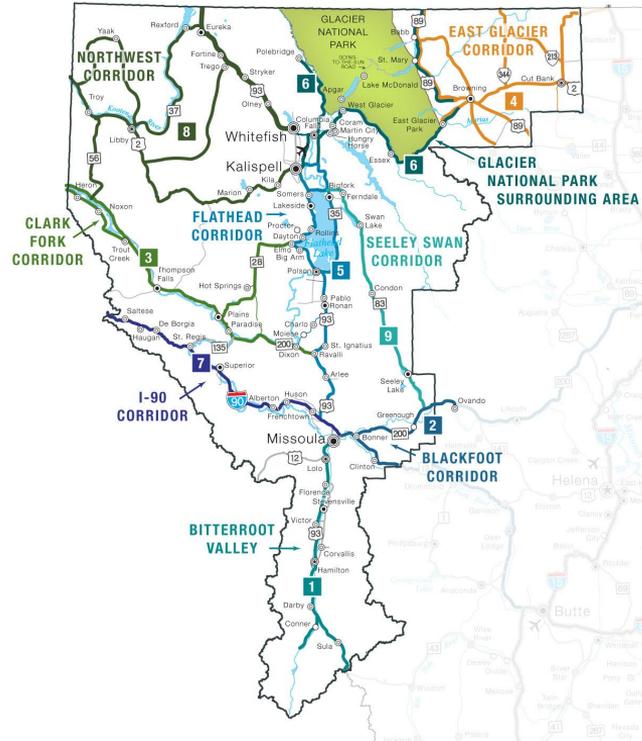


Western Montana's Glacier Country

Where We Are Located



Regional Makeup



8 counties | 22,000 sq. miles | 360,000 residents | 4 Canadian border crossings

9 travel corridors connecting mountains, rivers, and valleys

75+ communities including Missoula, Kalispell, and Whitefish

Home to Glacier National Park, two tribal nations, Flathead Lake, and four national forests



EIGHT UNIQUE PRIZE PACKAGES.



Lincoln County

Play & Stay in the Tobacco Valley



Mineral County

Route of the Hiawatha Retreat



Missoula County

Seeley Lake Escape



Lake County

Mission Valley Golf Getaway



Treasure the Journey Giveaway

Purpose:

- Designed to **bolster in-state off-the-beaten-path visitation** and disperse visitors throughout the region
- Targeted Montana residents
- Highlighted experiences across all eight counties

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The Strategy: Listen. Respond. Disperse.

What We Heard

- Rural partners reporting soft bookings
- Declining Canadian visitation pulling traffic away from smaller communities

What We Did

- 8 curated weekend getaways — one per county
- Each package: local lodging + activity + dining
- Targeted Montana residents as the primary drive market

The Message

- *"Rediscover your own backyard"*

Why it Worked

- Addressed real pain — partners told us, we listened
- Shifted focus beyond the obvious — away from peak season, away from the familiar
- Reminded residents that lesser-known corners of the region are worth exploring
- Dispersal as the outcome — not just a goal, but the result



A scenic landscape of a fjord with two people on a cliff. The scene is captured during the golden hour, with warm light reflecting off the water and the sky. The mountains are rugged and dark, contrasting with the calm, blue water. Two people, a man and a woman, are standing on a rocky outcrop in the foreground, looking out over the vast expanse of the fjord. The overall mood is peaceful and adventurous.

Q&A

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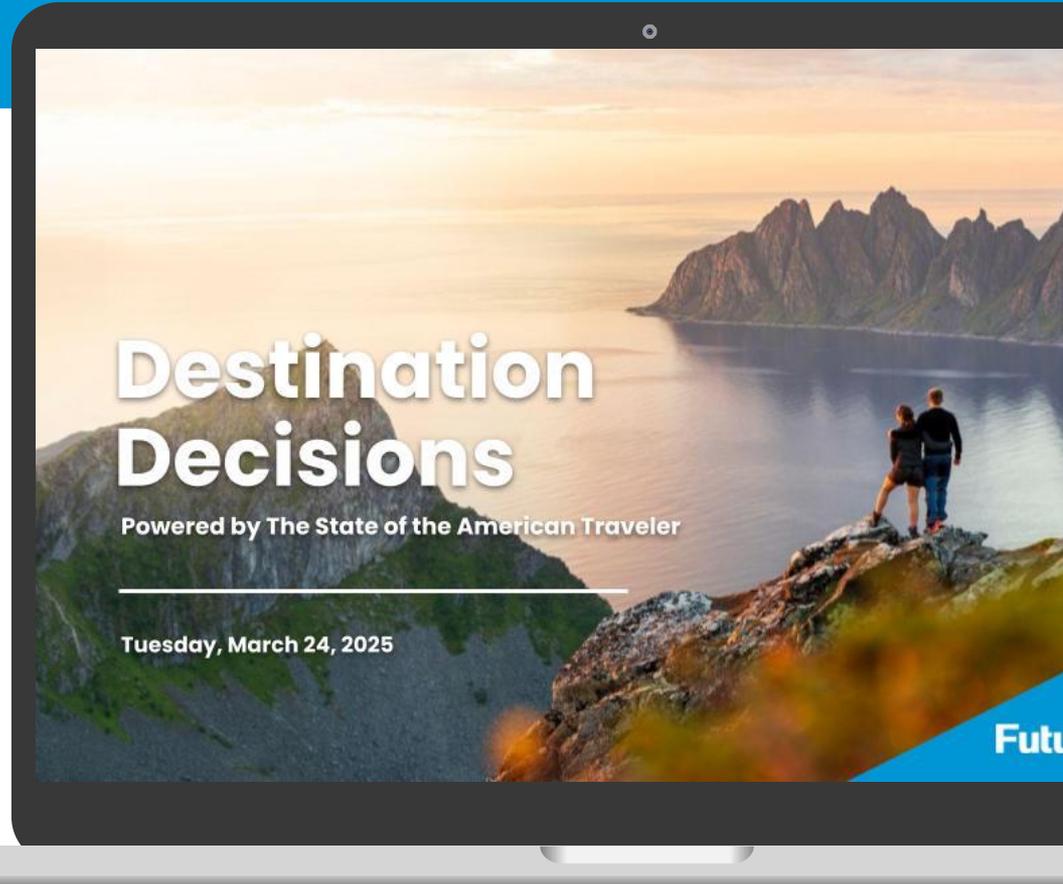
Resources

Research and Webinar Resources

Research, slides and other resources will be available at:

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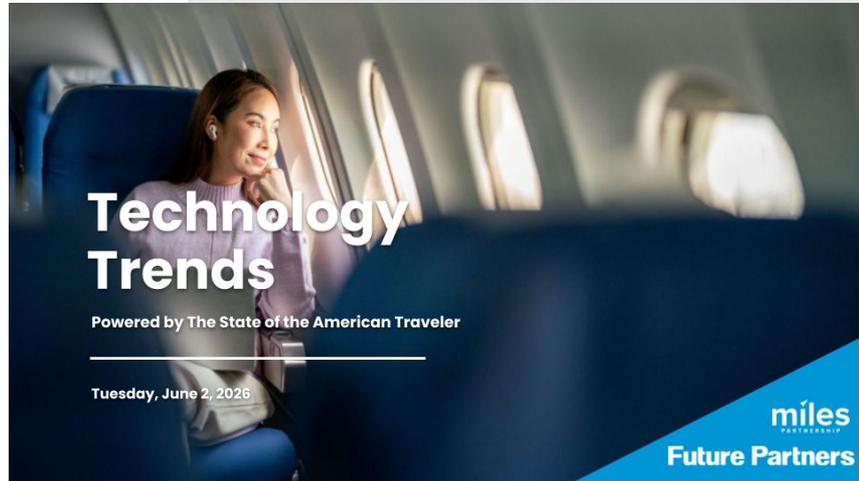
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Thank you!

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