

Traveler Segments Research Summary

Powered by The State of the American Traveler

This year's Traveler Segments edition of The State of the American Traveler study shines a spotlight on three distinct traveler segments, exploring how they approach leisure travel and how destinations can connect with them more effectively.

We examined AI-Assisted Travelers, Dispersal Travelers and K-Shaped Travelers. Together, these segments reflect three forces reshaping travel today: technological adoption, evolving destination preferences and economic divergence. The research explores how each group differs in its travel behaviors, preferences and marketing engagement, offering a closer look at what motivates these travelers and how destinations can reach them.

Future Partners and Miles Partnership are proud to share insights that help the travel and tourism industry stay informed and future-ready.



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Who are these travelers?

AI-Assisted Travelers: Travelers who used an AI tool to plan a trip in the past year.

Dispersal Travelers: Travelers who prefer off-season travel or have visited lesser-known destinations in the past two years.

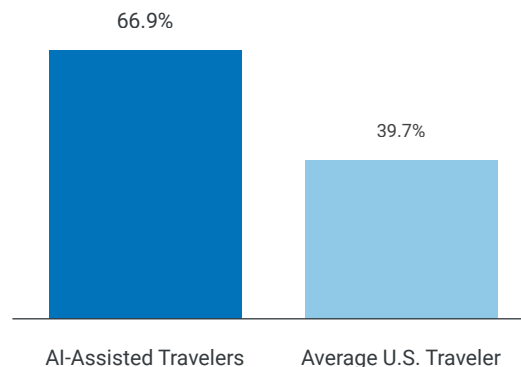
K-Shaped Travelers: Two subsegments based on income: Upper-K Travelers, the top 10% of earners, and Lower-K Travelers, those with household incomes below \$100,000.

AI-Assisted Travelers are turning to online video

In the past 12 months, have you used online video including visiting video sharing websites (e.g., YouTube, AOL Video, TikTok or Google Video) to plan any travel?

The bottom line: Digital influence plays a strong role among AI-Assisted Travelers. This group uses online video to plan travel at a much higher rate (67%) than the average U.S. traveler (40%), making dynamic, video-led content especially important for capturing their attention.

% used online video to plan travel in the past year

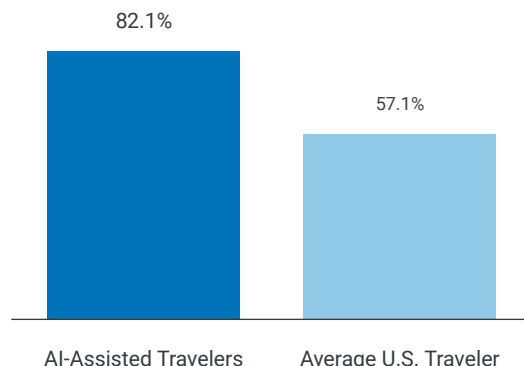


AI-Assisted Travelers are highly active on social media

In the past 12 months, which of these resources have you used to help plan your travel?

The bottom line: AI-Assisted Travelers have a strong social media footprint and are more active online than the average U.S. traveler. Instagram and TikTok stand out in particular, with this segment using both platforms for travel inspiration at higher rates than the average U.S. traveler. These channels should play an important role in the media mix for this audience.

% used any social media to plan travel in the past year

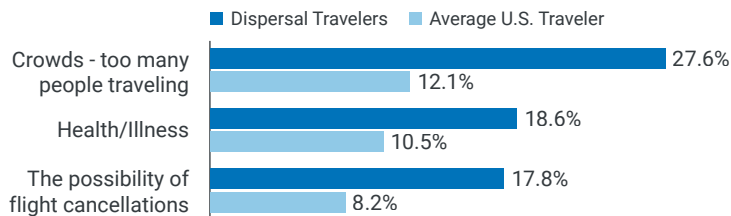


Overcrowding is a real deterrent for Dispersal Travelers

In the past 6 months, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?

The bottom line: Dispersal Travelers view overcrowding as a real deterrent to visiting a destination. Health and illness concerns also rank highly, followed closely by the possibility of flight cancellations. Emphasizing drive markets, open spaces and guidance on when travelers can expect fewer crowds can help destinations better appeal to this audience.

Differentiating travel deterrents



Dispersal Travelers seek authentic, one-of-a-kind experiences

Which were important to why you decided to visit this out-of-the-way or lesser-known destination?

The bottom line: When asked what draws them to lesser-known destinations, U.S. travelers ranked fewer crowds, authentic local experiences, novelty, local culture and uniqueness among the most important factors. Highlighting distinctive local experiences and one-of-a-kind activities can help destinations draw visitors beyond their best-known locations.

Factors driving their decision to visit a lesser-known destination

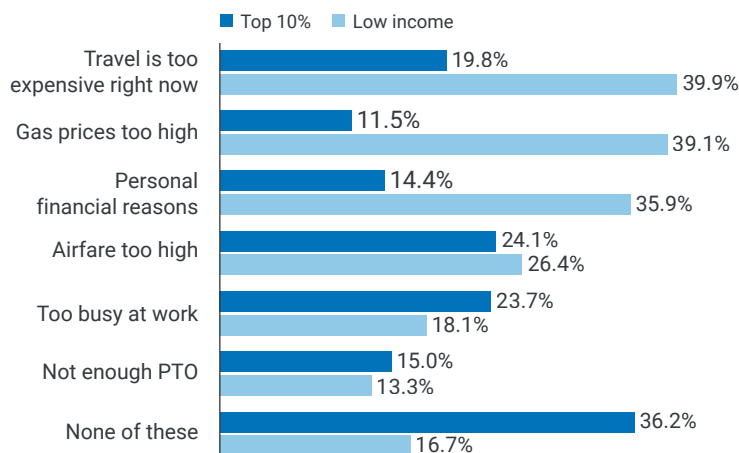
51.3%	Fewer crowds
46.3%	An authentic local experience
40.8%	Nature, scenery, or outdoor recreation
36.0%	Novelty or discovery
32.4%	Local culture and everyday life
30.6%	Uniqueness or distinctiveness
30.0%	Adventure
23.5%	Affordability
21.5%	Limited commercialization
15.9%	Support for local businesses and communities
12.1%	Interesting stories or experiences to share
10.9%	Festival or special event

Travel concerns differ across K-Shaped Travelers

In the past 6 months, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?

The bottom line: When comparing Upper-K Travelers (top 10% of earners) with Lower-K Travelers (travelers who have household incomes below \$100,000), the differences are clear. Upper-K Travelers are more likely to cite time and airfare costs as travel deterrents, while Lower-K Travelers express broader cost concerns, including high gas prices, personal financial reasons and the overall expense of travel.

Differentiating travel deterrents

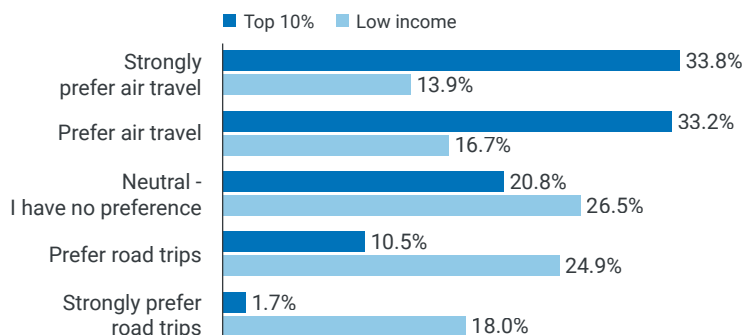


K-Shaped Travelers take different routes

Thinking about leisure travel, do you generally prefer to travel by air or automobile (e.g., road trips)?

The bottom line: These travel barrier gaps also show up in how the two segments prefer to travel, with Upper-K Travelers decidedly preferring air travel over road trips (67% prefer air travel vs. 12% prefer road trips), while Lower-K Travelers show a strong preference for road trips over air travel (43% vs. 30%). These differences highlight how income can shape not only whether travelers take a trip, but how they choose to get there.

Prefer air travel vs. road trips



5 Essential Insights

1

More than eight in 10 AI-Assisted Travelers use social media to plan travel, compared to 57% of the average U.S. traveler. Instagram and TikTok are especially important for reaching this audience.

2

AI-Assisted Travelers are also much more likely to use online video for trip planning, with 67% doing so compared to 40% of the average U.S. traveler. Video-led content can help capture their attention.

3

Overcrowding is a much greater deterrent for Dispersal Travelers, cited by 28% of Dispersal Travelers compared to 12% of the average U.S. traveler. Spotlighting open spaces and less crowded times can help destinations appeal to them.

4

Fewer crowds are the leading reason travelers choose lesser-known destinations, followed by authentic local experiences, nature, novelty and local culture.

5

Upper-K Travelers strongly favor air travel, while Lower-K Travelers with household incomes below \$100,000 are more likely to prefer road trips over air travel, highlighting how income can influence both the ability to travel and the way travelers choose to get there.

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