

THE STATE OF THE AMERICAN TRAVELER: Traveler Segments Edition 2022

RESEARCH SUMMARY



Executive Summary

The Traveler Segments research is a Special Edition of The State of the American Traveler and shares original insights into critical segments of U.S. travelers.

In the latest annual webinar and report, Destination Analysts and Miles Partnership shared custom research on the post-pandemic evolution for key segments including those visiting friends and family (VFR), Gen Z, luxury, wellness and outdoor adventure travelers. Mark Ellwood, editor-at-large with Robb Report, gave a special look at affluent and luxury travelers, highlighting their travel patterns and priorities plus the types of experiences they are seeking post pandemic. With COVID fading quickly in the rear view for many, new challenges, concerns and priorities have taken the front seat for these different groups of U.S. leisure travelers.

“Travelers are spending their money to go somewhere no one else has been...
[They’re looking for] non-conventional ways of traveling, not just destinations.
How do you turn the journey into something more interesting?”

- Mark Ellwood, editor-at-large, Robb Report

For more from the Traveler Segments Edition, check out the [recording, slide deck and other resources](#) on the Miles website including individual [research summaries on each traveler segment](#).

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GEN Z TRAVELERS = DIVERSITY

Gen Z represents some of the most diverse U.S. traveler segments critical to the industry, as they represent our future with many years of travel purchasing ahead. This diversity is shown not only in their identities, but also financial outlook, interests, social channel consumption and motivation to take a trip.

GEN Z TRAVELERS DON'T FEEL REPRESENTED

Almost half of Gen Z state they don't feel that the majority of travel advertisements reflect or portray who they are as individuals. This is also echoed in how they are feeling, with 3 in 10 Gen Z travelers saying they often feel lonely and are openly seeking romance and connection.



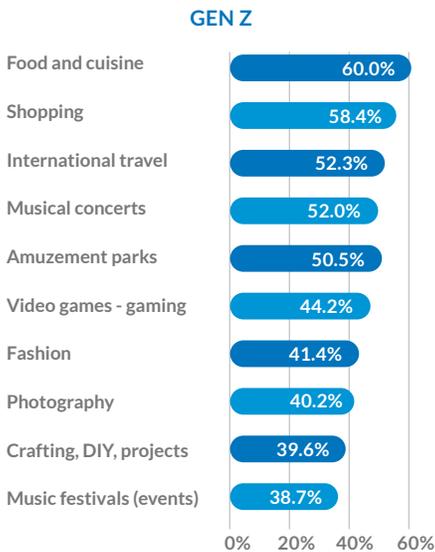
IDENTIFY AS A NON-CAUCASIAN RACE



IDENTIFY AS A LGBTQIA+



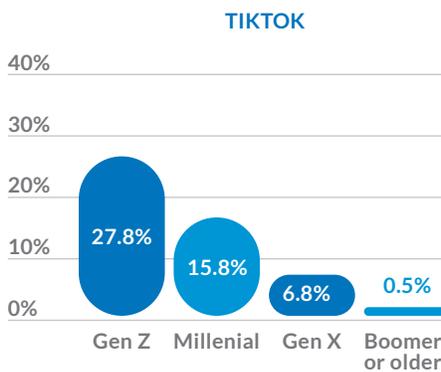
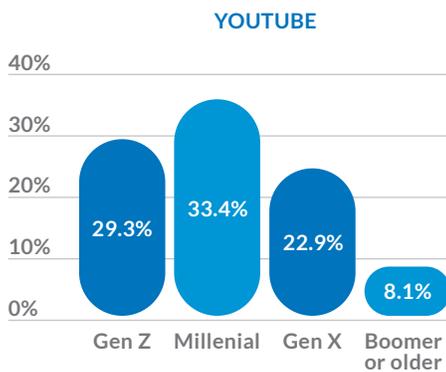
TRAVEL WITH VARYING ACCESSIBILITY



GEN Z TRAVELERS HAVE MORE & GREATER DIVERSITY IN THEIR INTERESTS

This younger generation is seeking excitement, and they are prioritizing a variety of different interests compared to other traveler segments. Noticeably, the emphasis on video games, cuisine and shopping. A high interest in international travel could represent a larger challenge to maintain footing in domestic travel with this segment in the coming years.

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



A While Gen Z does rely on YouTube for travel planning, TikTok is clearly the Gen Z realm for travel planning and inspiration. Engaging with this segment successfully on their top social platforms could have substantial effects on influencing domestic travel and brand loyalty.

Luxury Travelers

Defined As:

Travelers that will Highly Prioritize Luxury Travel in their Upcoming Trips



LUXURY TRAVELERS DEFINED

Luxury travelers make up 27% of American travelers and will be spending on average over \$6,000 on leisure travel in the next 12 months. Luxury travelers are most likely to talk to trusted friends and family to plan future trips; additionally, 59% of these travelers say they are someone others seek travel advice from.

\$6,260 will be Spent on Leisure Travel in the next 12 Months on average – \$2k+ More than the Typical American Traveler

MORE: See the interview with Mark Ellwood in the [webinar recording from the 32-minute mark here.](#)

Q How can a destination, property or attraction make themselves **MORE APPEALING** to travelers seeking luxury?

A “Ultra high net worth individuals do not make travel decisions alone. Travel agents are far from dead, they’ve just migrated to the highest possible end. If you want to get a high end traveler you’re really needing to do B2B marketing as much as B2C, because they are told where to go by their trusted travel specialists. That’s a really important part of decision making.”

- Mark Ellwood

LUXURY TRAVELERS

- One-third (33%) **Used/ Redeemed Travel Rewards** or Points on their Most Recent Overnight Trip
- 59% say they are someone **others seek travel advice from**
- Exhibit the **Highest Prioritization of Travel** – Financially and Emotionally
- California and New York high on their destination list
- **Food/Cuisine** is a top destination motivator
- 32% used an official destination website to plan travel in the last year
- **News junkies** – 80% regularly consume content from major national news outlets and sources
- 30% say they are totally up-to-date on the **latest travel technologies**
- 61% would be interested in using the **metaverse** as a way to get travel inspiration

For more on luxury and affluent travel trends, check out a few of Mark Ellwood’s recent articles. See more at:

www.robreport.com/travel

[Skyrocketing Prices & Poor Service](#)

[This Luxury Space Balloon has a Stylish Interior](#)

[Luxury Travelers’ Remote Working Trends](#)

[Luxury Hotels & Resorts are Targeting Locals](#)

[Here are the Best \[Luxury\] Travel Specialists](#)

5 Key Takeaways

1

Continued concerns around rising inflation, the cost of airfare and personal financial situations continue to impact most travelers, particularly Gen Z and VFR travel spending and decisions.

2

Despite these concerns, financial optimism still remains steady in every segment regarding travel as a high priority in the next three months.

3

Leisure travel involving Visiting Friends and Relatives (VFR) which has always been important, has grown post pandemic. Engagement with local residents, who will be influencing their friends and relatives' travel decisions, is a key driver to maximize outcomes for your destination.

4

More than ever, travelers are looking for destinations that can deliver on their promise of quality service and problem solving. Nearly half of leisure travelers report service issues on trips and rated their experiences as frustrating. Work with your industry partners on addressing workforce and custom service issues.

5

Strong relationships with specialist travel advisors and agents is critical in connecting your destination with affluent and luxury travelers who highly prioritize travel and rely on word of mouth for their travel plans.

MORE: See the [recording, slide sets and other resources from the 2022 Traveler Segments webinar](#). See in depth analysis of [National Park and Outdoor Enthusiast Travelers from our 2021 Edition of the Traveler Segments State of the American Traveler](#)

ANALYSIS BY

miles
PARTNERSHIP

RESEARCH BY

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ADDITIONAL RESOURCES

Webinar: [The State of the American Traveler, Destinations Edition 2022](#)

Blog Post: [Gas Prices, War & Risks for the Recovery of Travel](#)

White Paper: [Hyper-Informed Traveler – insights on the increasingly complex and fragmented sources of information for travelers](#)

