

Reading The Crystal Ball:

American Traveler Sentiment & Trends



Amir Eylon
January 14, 2025



I Have Two Versions of My Presentation...



OR



WARNING! I Have A Lot of Content!

- **I DO NOT get paid by the slide!**
- **I will move quickly!**
- **This presentation will be made available to you!**
- **So sit back, relax, and just listen...**





WHO WE ARE

Established in 1978 as a
market research
consultancy

Headquartered in
Columbus, OH and
Toronto, ON

Focused in
tourism since
1985

Working with over
175 Destinations
and Brands



AGENDA



- Latest American Travel Sentiment Outlook
- Key Learnings & Trends
- Q & A



First Up: The Current Lay of the Land!

A person with blonde hair tied back, wearing a teal long-sleeved shirt, stands on a rugged, reddish-brown rocky cliff. They are looking out over a wide, deep canyon where a river flows. The sky is filled with dramatic, dark clouds illuminated by the warm, golden light of a setting or rising sun. The overall mood is contemplative and scenic.

THE ROAD AHEAD

American Travel Sentiment Study

Wave 91: Holiday Travel & Political Partisanship/Views

NOVEMBER 21, 2024

Longwoods
INTERNATIONAL

miles
PARTNERSHIP

American Travel Sentiment Study

Fielded NOVEMBER 7, 2024

U.S. National Sample of 1,000 Adults 18+

Expectations/Looking Ahead*

- Welcoming
- Outdoors
- Road Trips & EV's
- "Bleisure" Evolves – Work From Anywhere
- Extreme Weather
- "Gig Travel"
- Rate Sensitivity
- Expectation of Service
- Expectation of Flexibility
- Expectation of Clarity
- Expectation of Locals
- Expectation of Balance
- Off-Season Travel
- AI's Impact
- Sustainability
- Politicalization of Travel
- "Re" & "Me!"



*Triangulate Sentiment Research with Longwoods Travel USA Research

BUT FIRST... POLITICS!



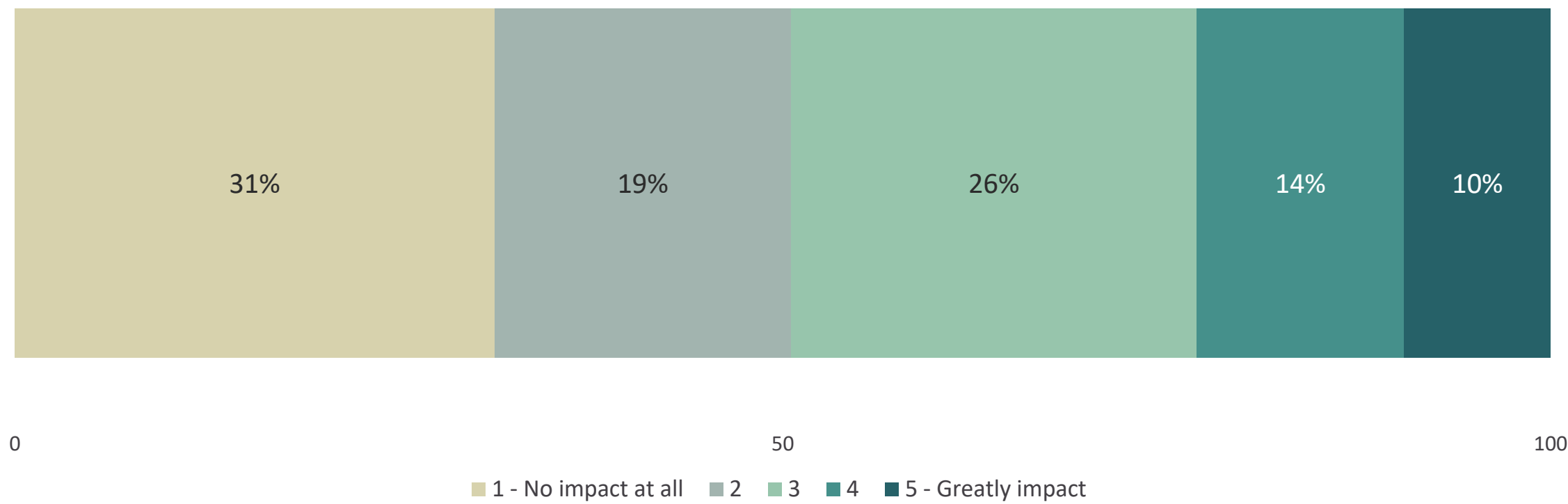
BY NOVEMBER, YOU WERE FEELING LIKE THIS...



LITERALLY
ANYONE ELSE
★ 2024 ★

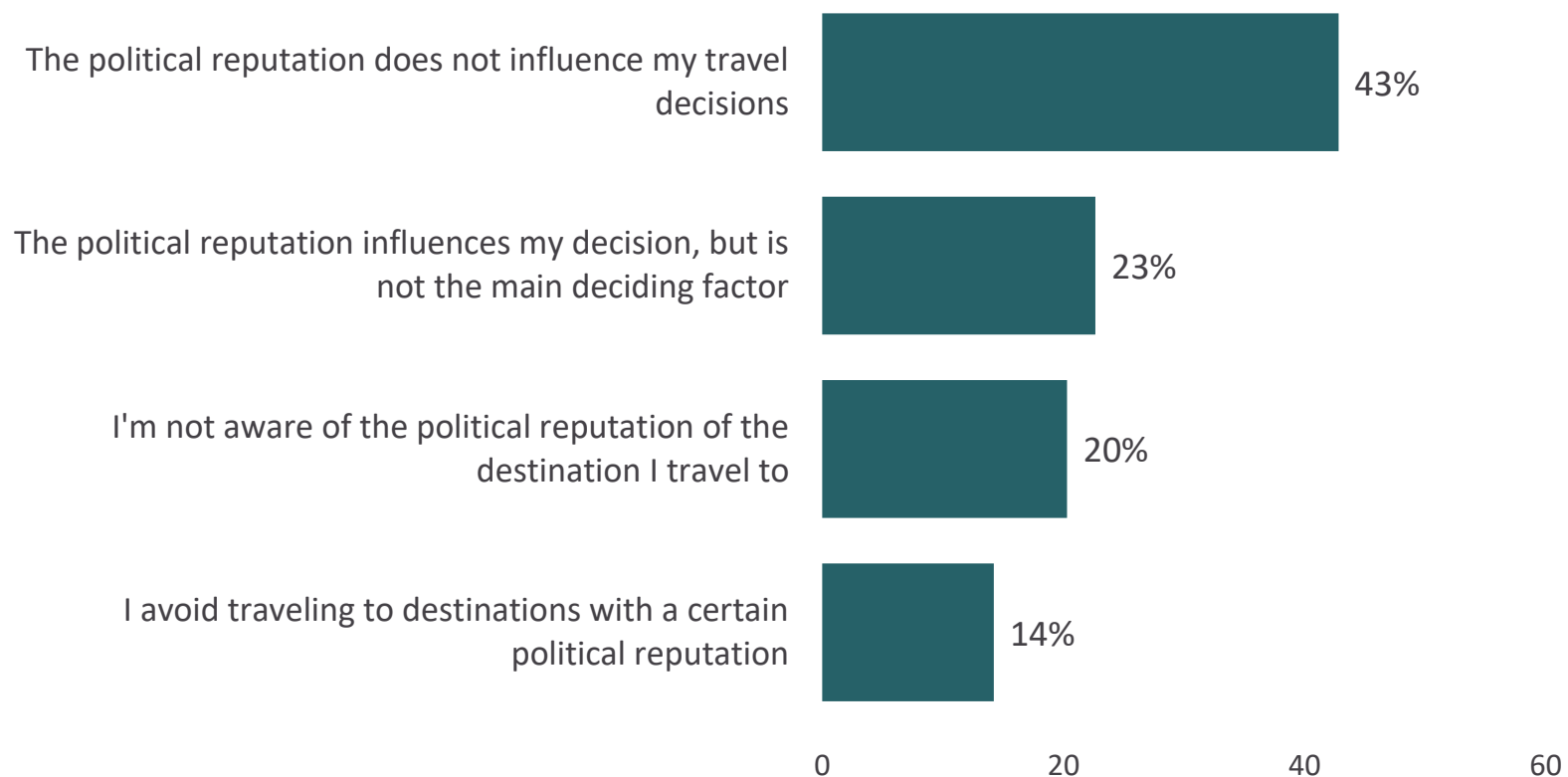
IMPACT ON TRAVEL PLANS

To what extent does the political climate of a destination influence your decision to visit?



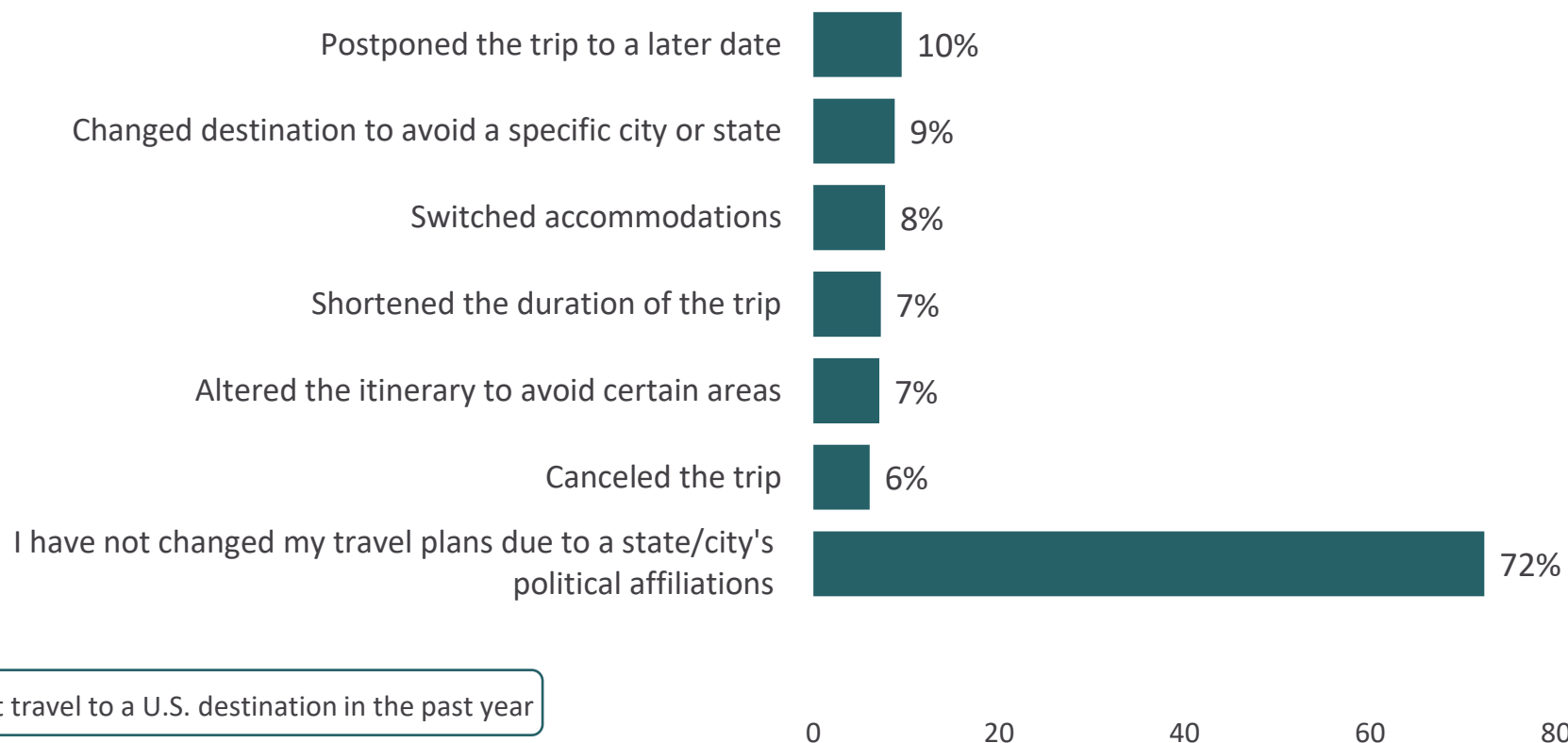
IMPACT ON TRAVEL PLANS

How does the political reputation of a destination (e.g., traditionally a blue/Democratic or red/Republican) influence your decision to travel there?

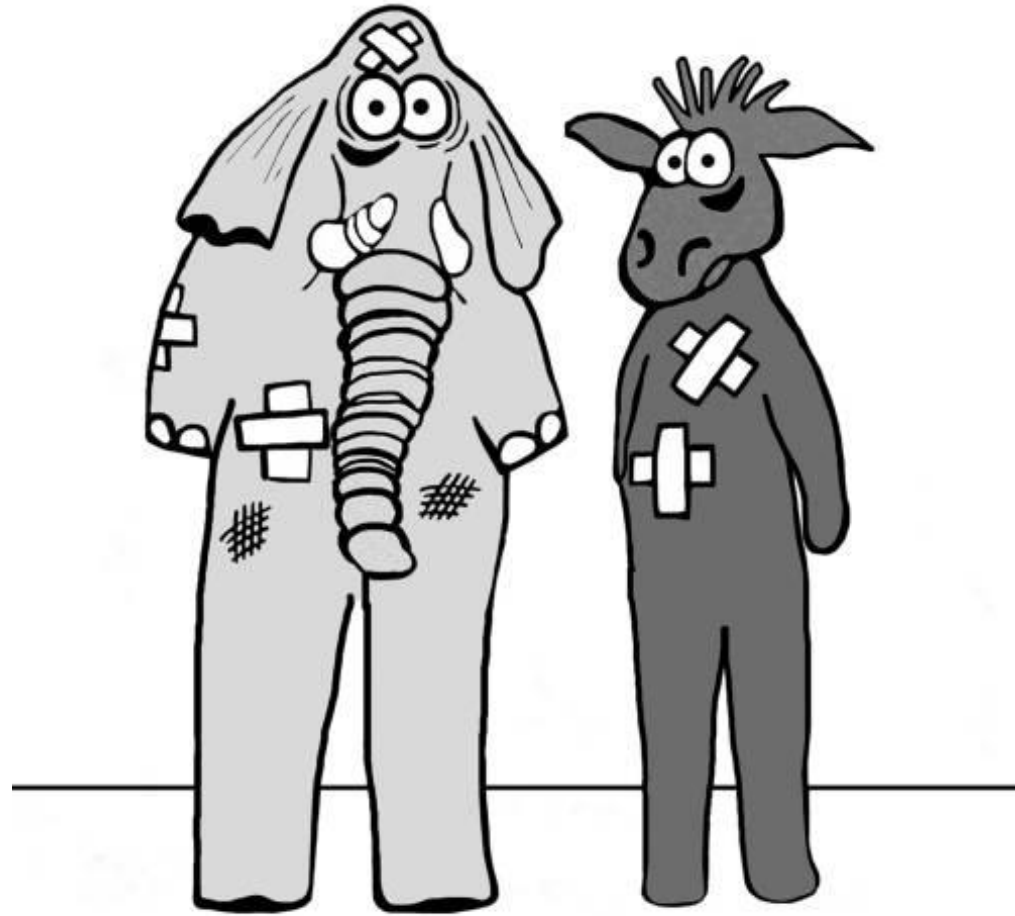


IMPACT ON TRAVEL PLANS

In the past year, have you changed your travel plans to a U.S. destination due to legislation, policies, or political affiliations?

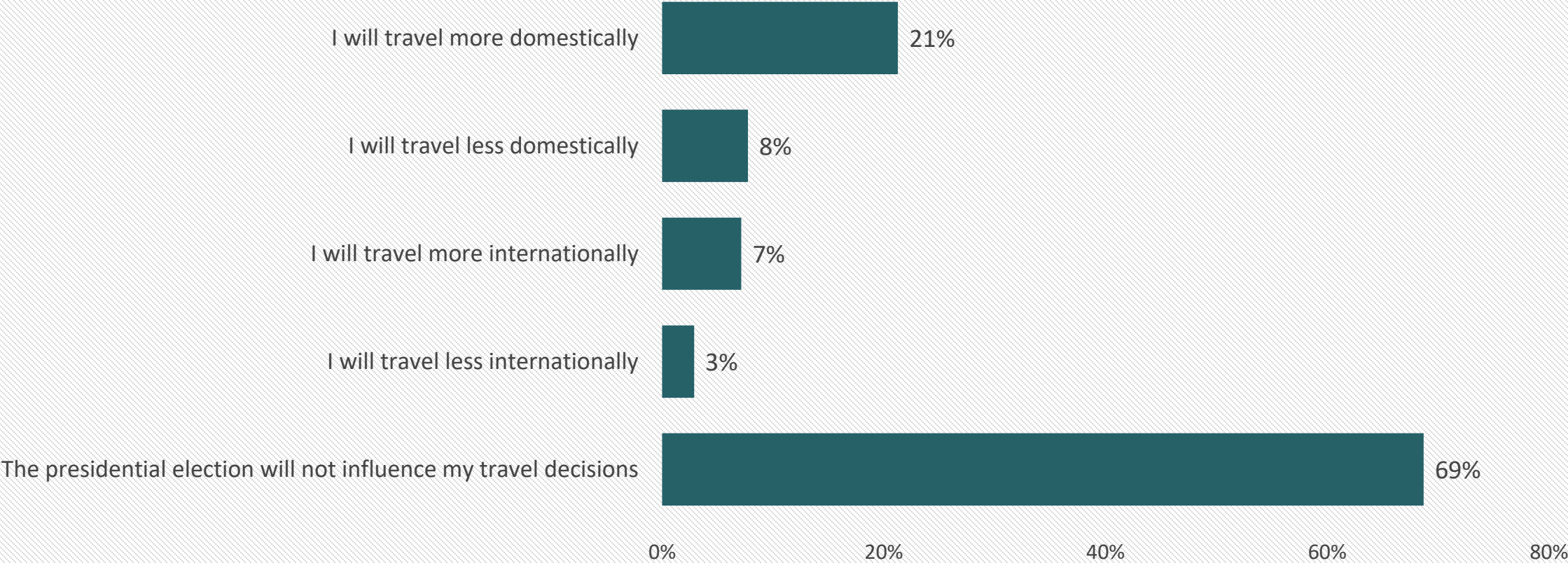


INAUGURATION NEXT WEEK & NEW CONGRESS...



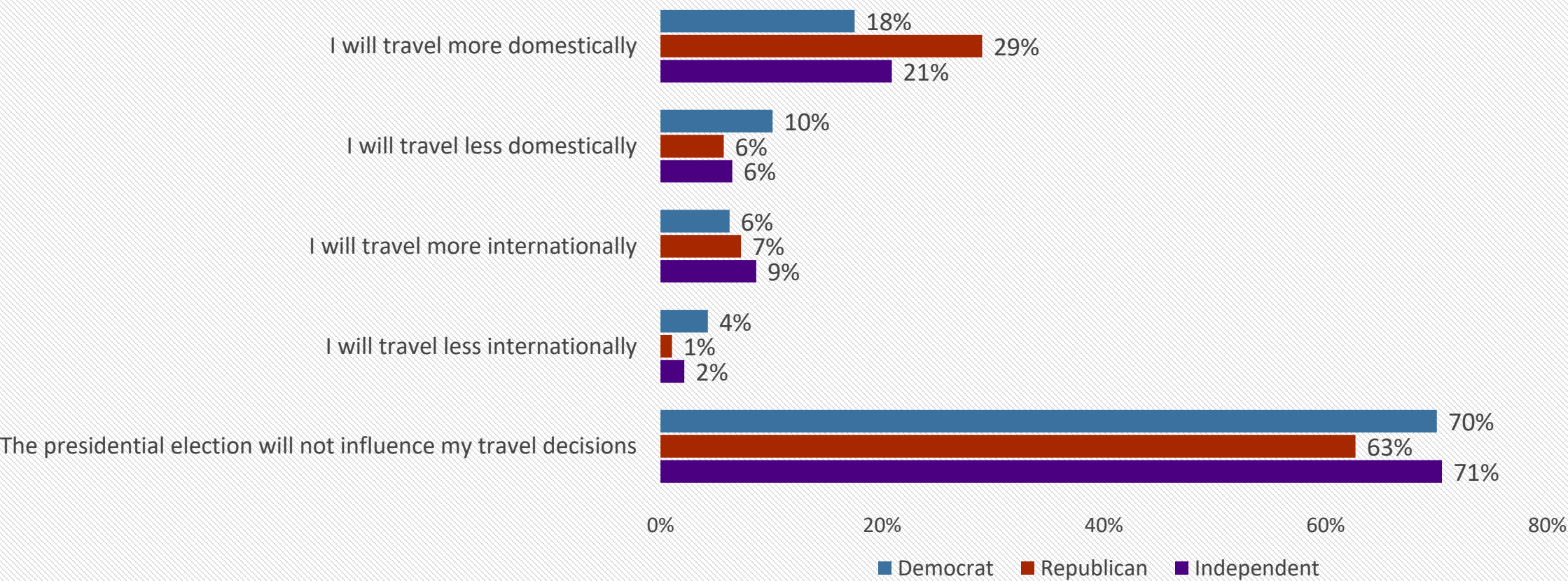
IMPACT ON TRAVEL PLANS

How will the outcome of the 2024 presidential election influence your leisure travel plans in the coming year?



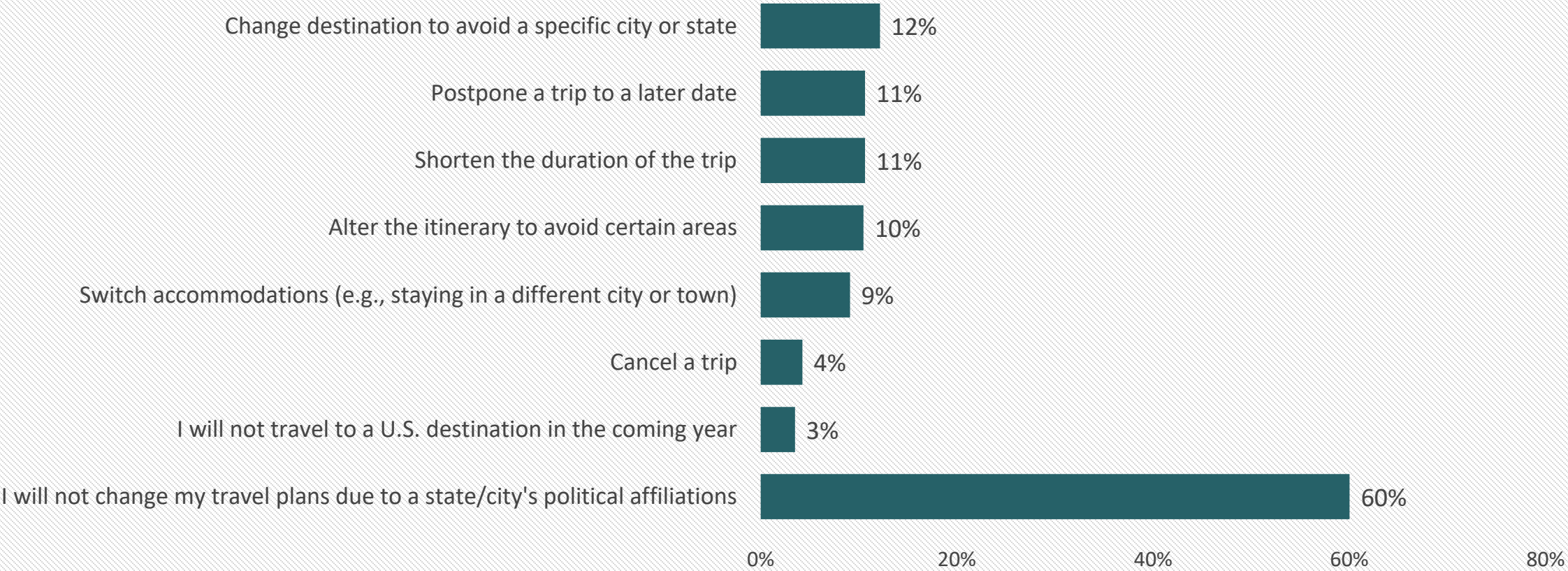
IMPACT ON TRAVEL PLANS

How will the outcome of the 2024 presidential election influence your leisure travel plans in the coming year?



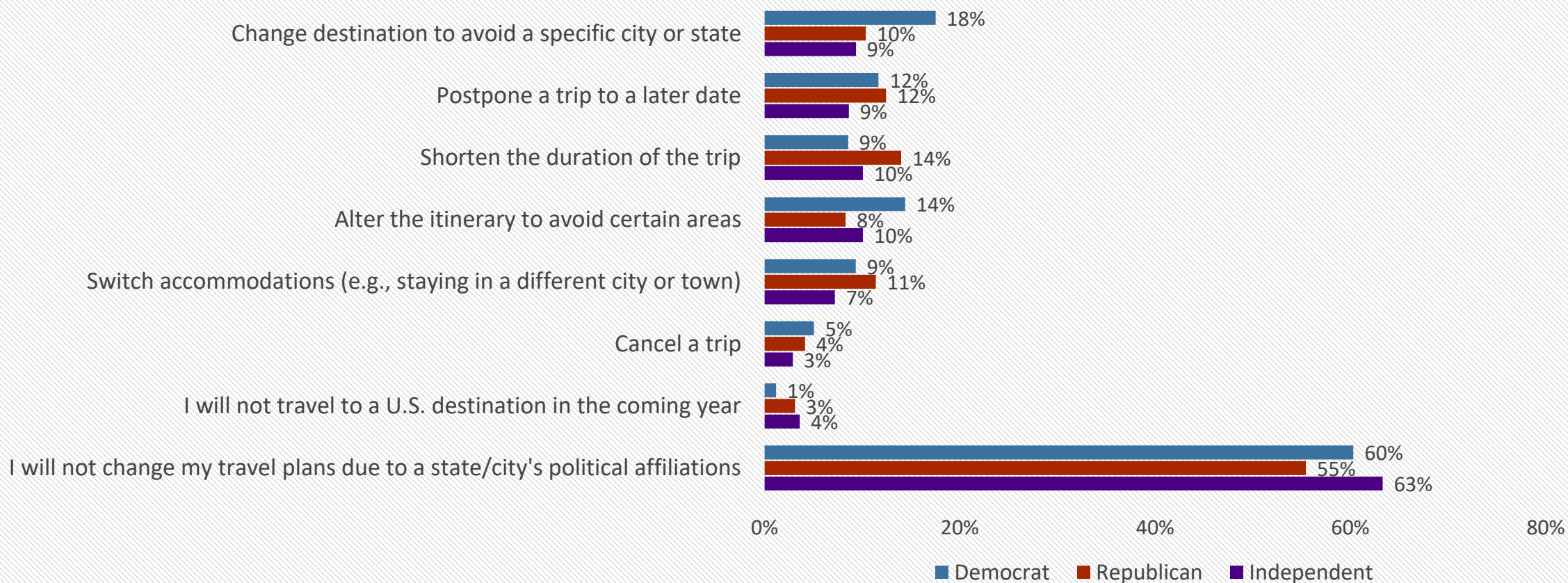
IMPACT ON TRAVEL PLANS

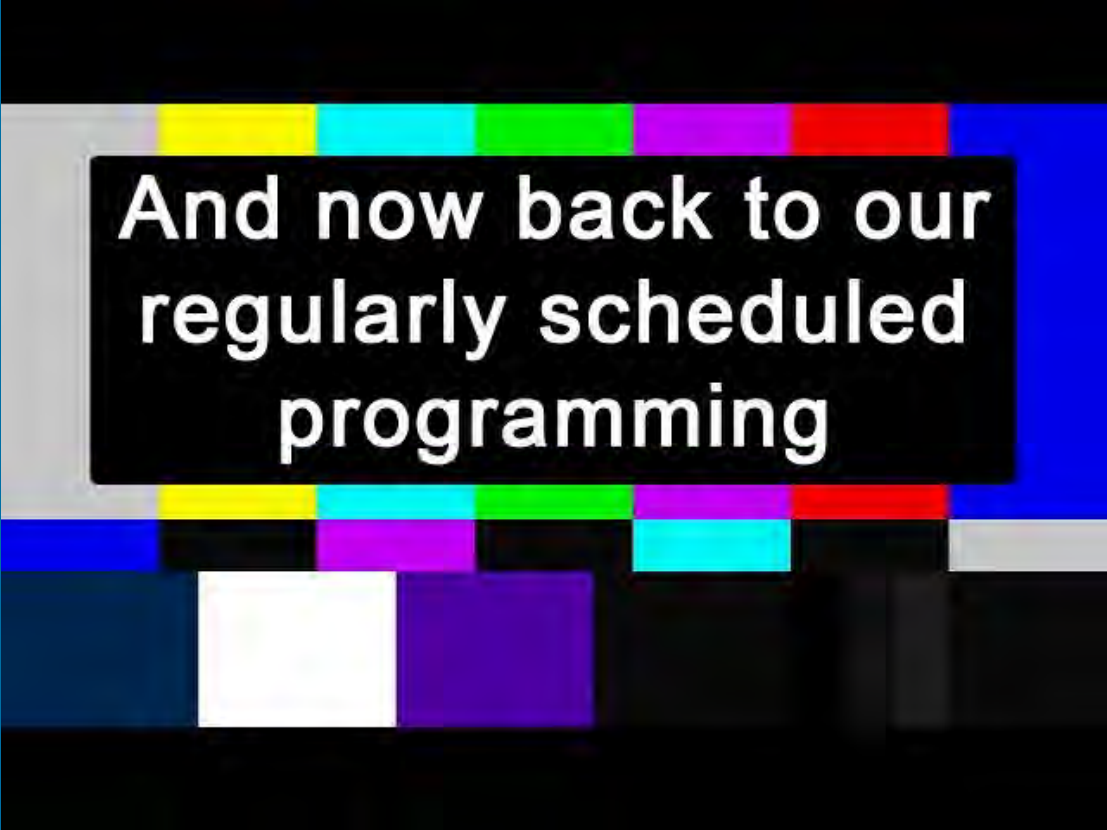
In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?



IMPACT ON TRAVEL PLANS

In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?



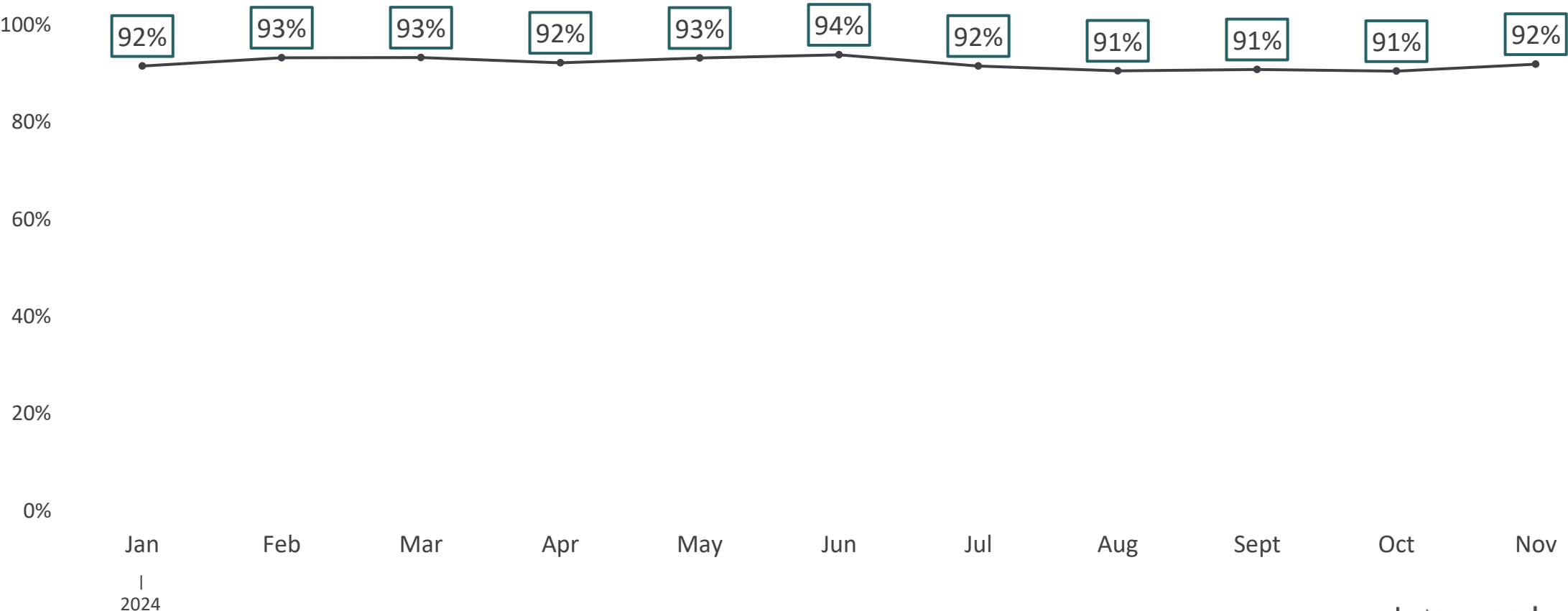
A television screen is shown with a color calibration chart. The chart features a series of colored squares: yellow, cyan, magenta, red, blue, and white. A black rectangular text box is superimposed on the chart, containing the text "And now back to our regularly scheduled programming" in white. The background of the screen is black.

And now back to our
regularly scheduled
programming

**The Current Lay of
the Land!**

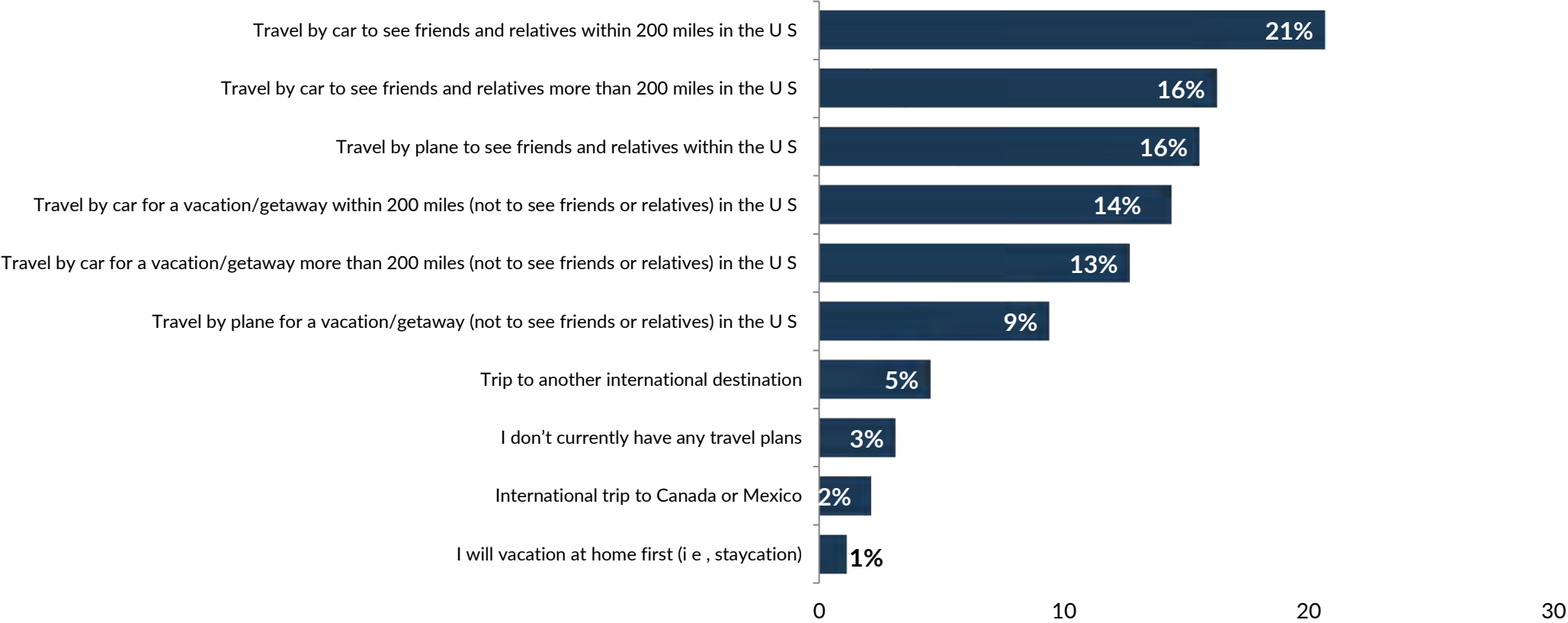
IMPACT ON TRAVEL PLANS

Travelers with Travel Plans in the Next Six Months Comparison



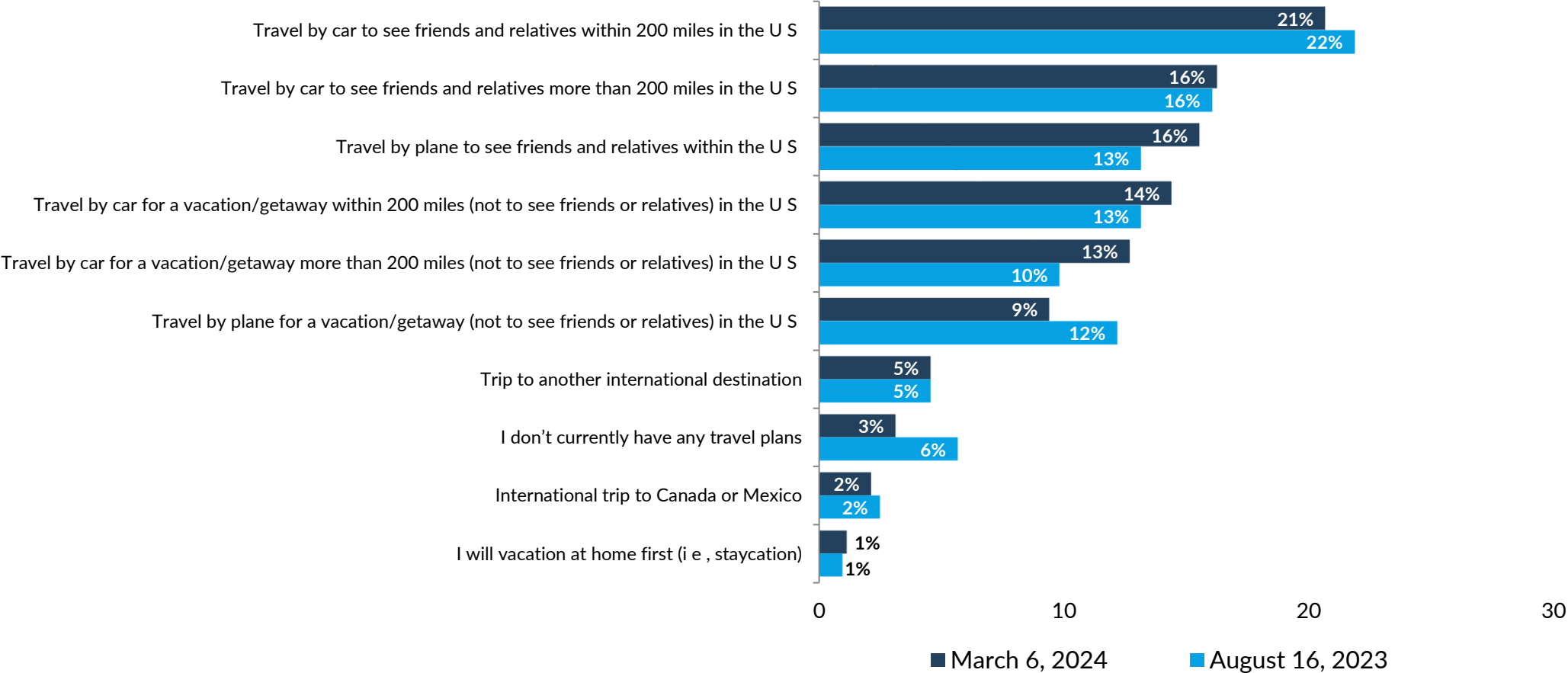
IMPACT ON TRAVEL PLANS

Next Trip Travelers Will Take



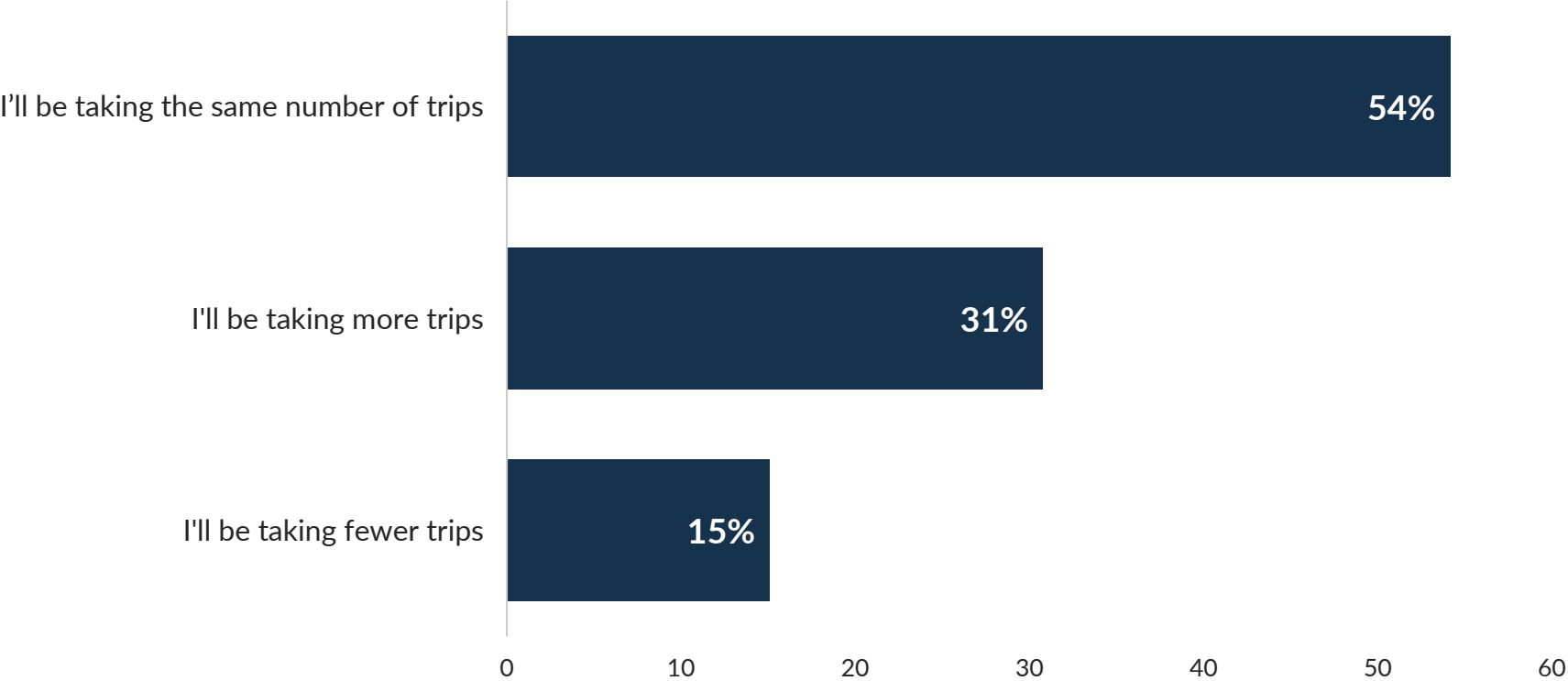
IMPACT ON TRAVEL PLANS

Next Trip Travelers Will Take



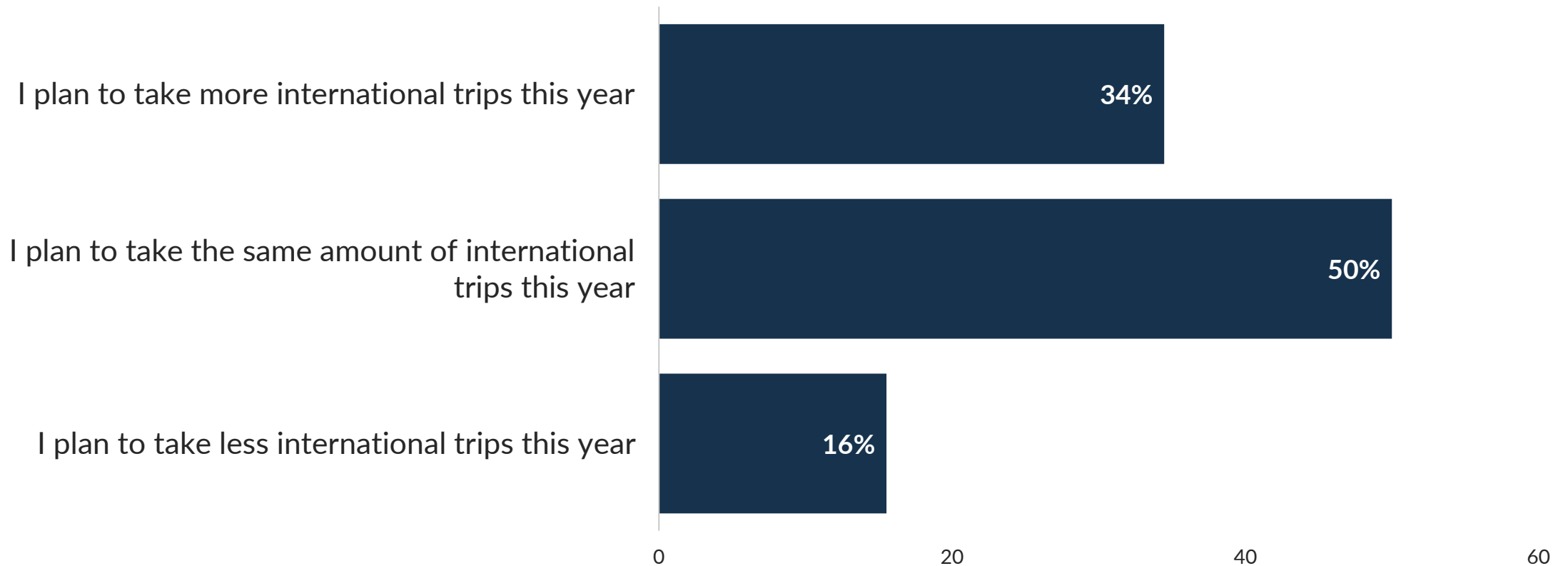
IMPACT ON TRAVEL PLANS

Compared to last year, which of the following best describes your plans for leisure and vacation travel this year?



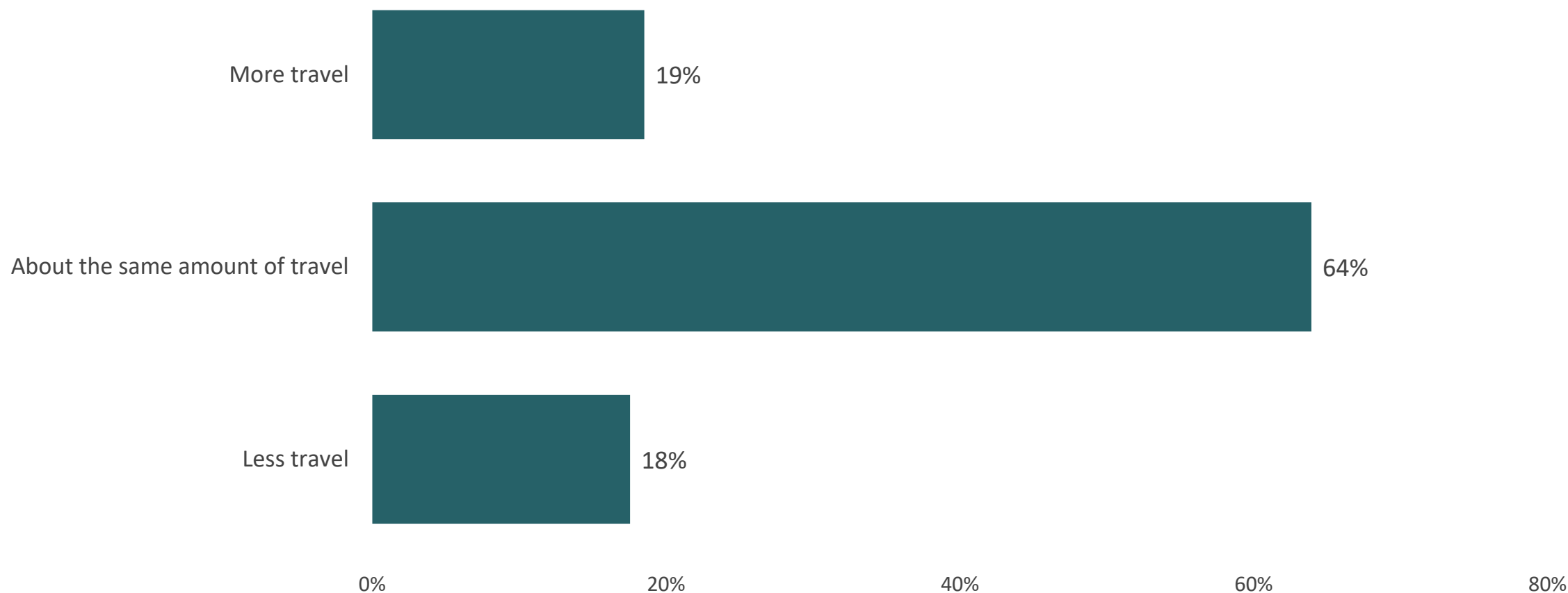
IMPACT ON TRAVEL PLANS

Compared to last year, how often do you plan to travel internationally for leisure this year?



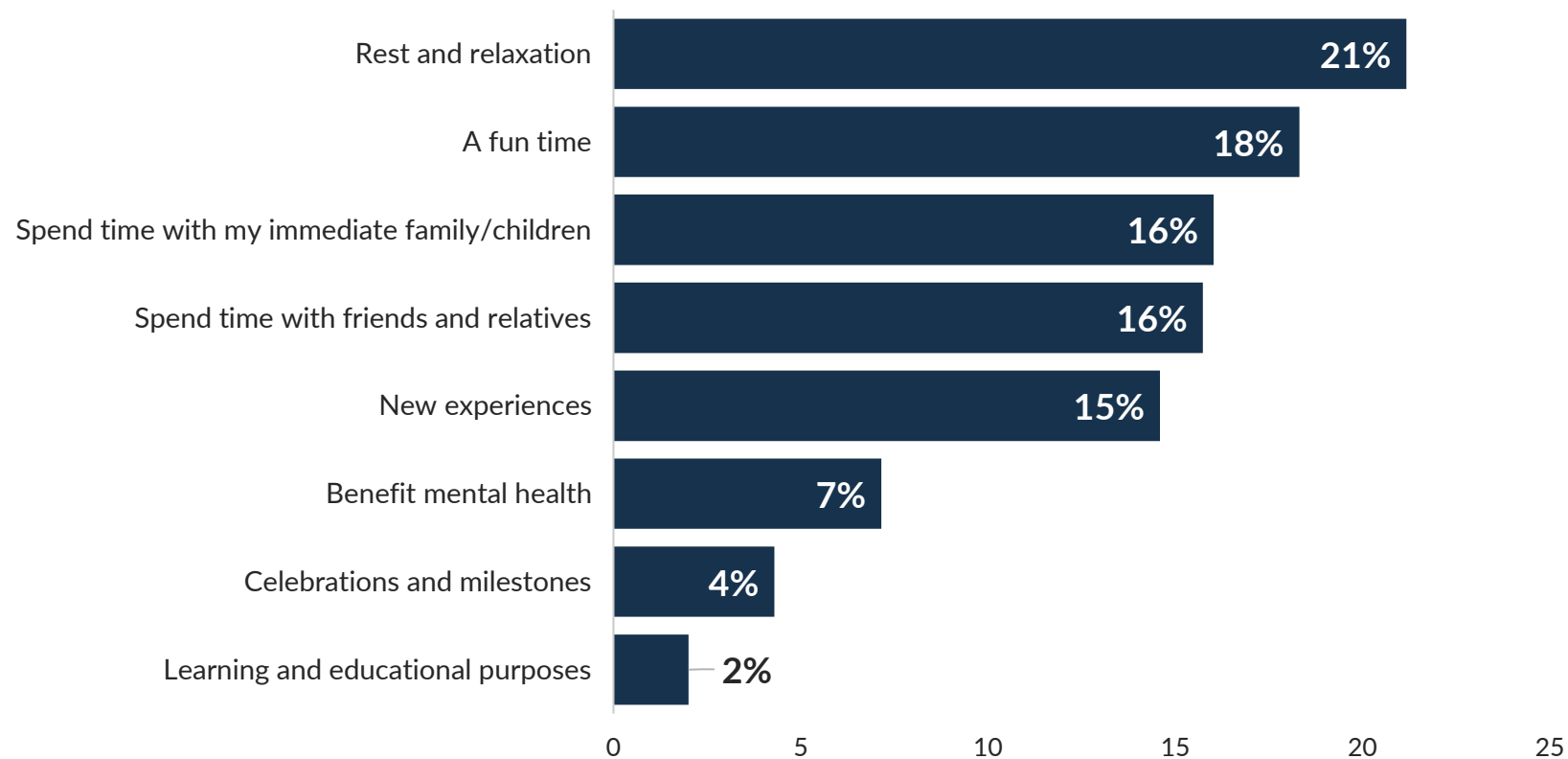
IMPACT ON TRAVEL PLANS

Compared to last year, how often do you plan to travel this holiday season?



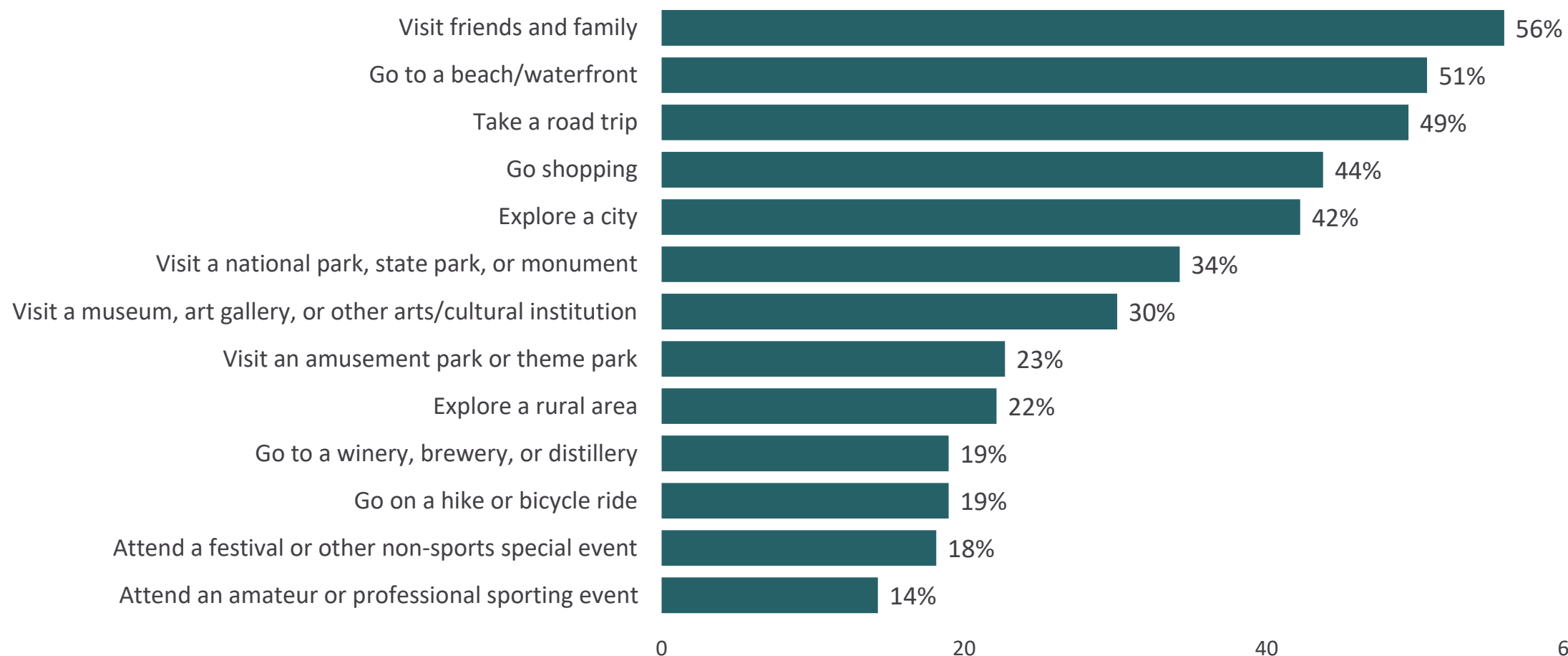
IMPACT ON TRAVEL PLANS

What is your main motivation for leisure travel?














IMPACT ON TRAVEL PLANS

Activities Travelers Plan to Do on Next Leisure Trip









2024 Q1-Q3 Louisiana Overnight Trips: Main Purpose of Trip

	VFR Visiting friends / relatives	35%	
	Touring	12%	
	Casino	10%	
	Special event	9%	
	City trip	8%	
	Outdoors	6%	
	Cruise	3%	
	Resort	2%	
			Conference/Convention 3%
			Other business trip 5%
			Business Leisure 4%

Base: 2024 Overnight Trips

2024 Q1-Q3 Louisiana Overnight Trips: Activities

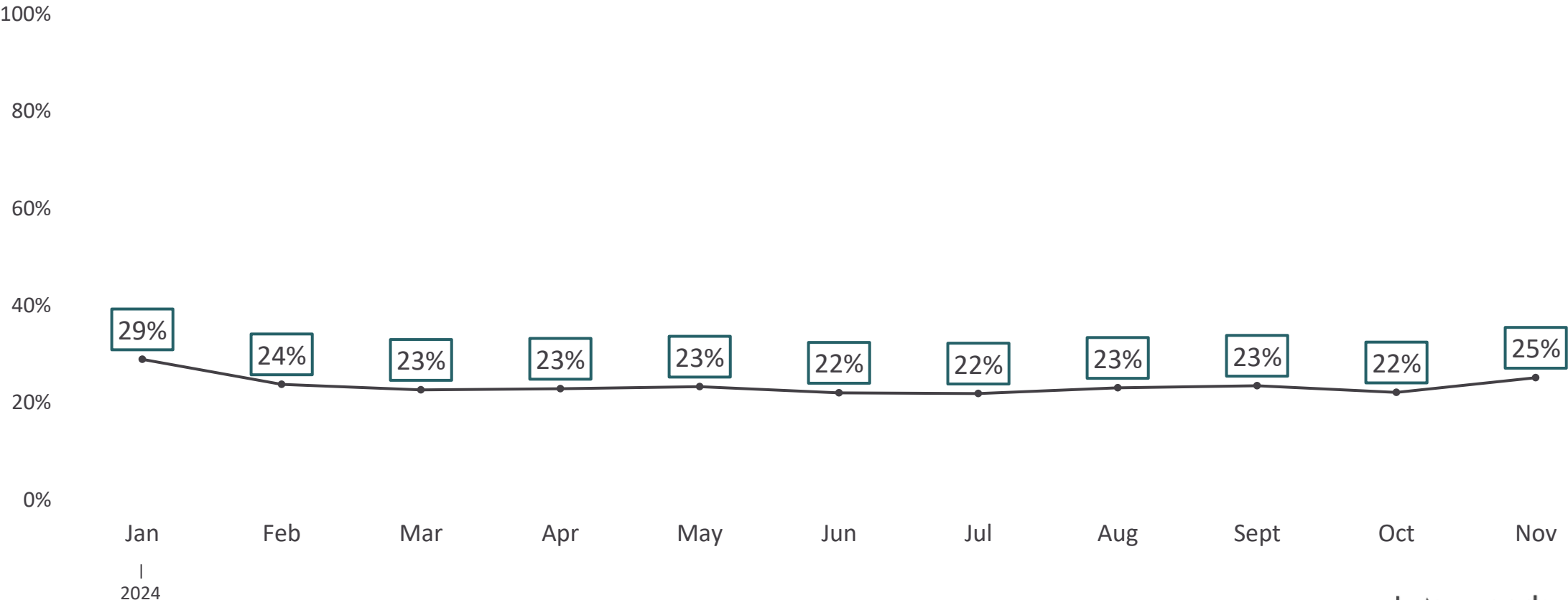
Shopping Types on Trip		2024
	Shopping at locally owned businesses	51%
	Souvenir shopping	46%
	Outlet/mall shopping	45%
	Convenience/grocery shopping	42%
	Big box stores (Walmart, Costco)	35%
	Farmers market	20%
	Antiquing	18%

Dining Types on Trip		2024
	Casual dining	59%
	Fast food	48%
	Unique/local food	41%
	Carry out/food delivery service (UberEATS, DoorDash, etc.)	25%
	Fine/upscale dining	23%
	Picnicking	11%

Base: 2024 Overnight Person-Trips that included Shopping

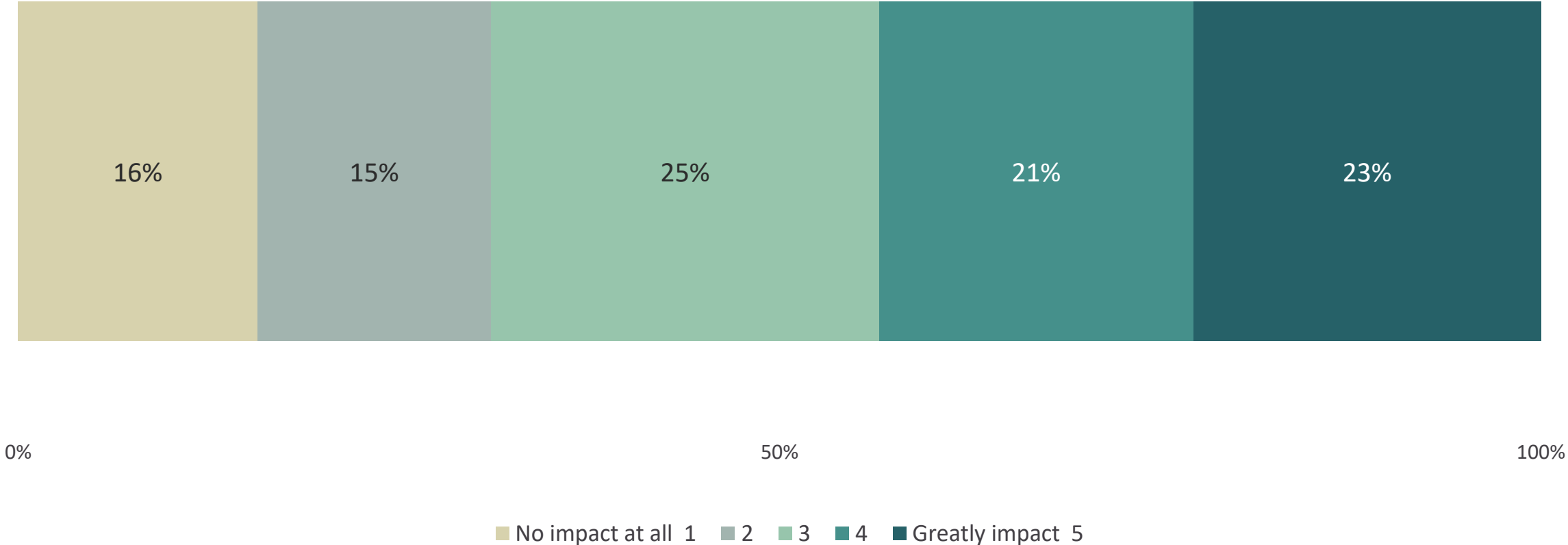
IMPACT ON TRAVEL PLANS

Indicated that Transportation Costs Would Greatly Impact their Decision to Travel in the Next Six Months



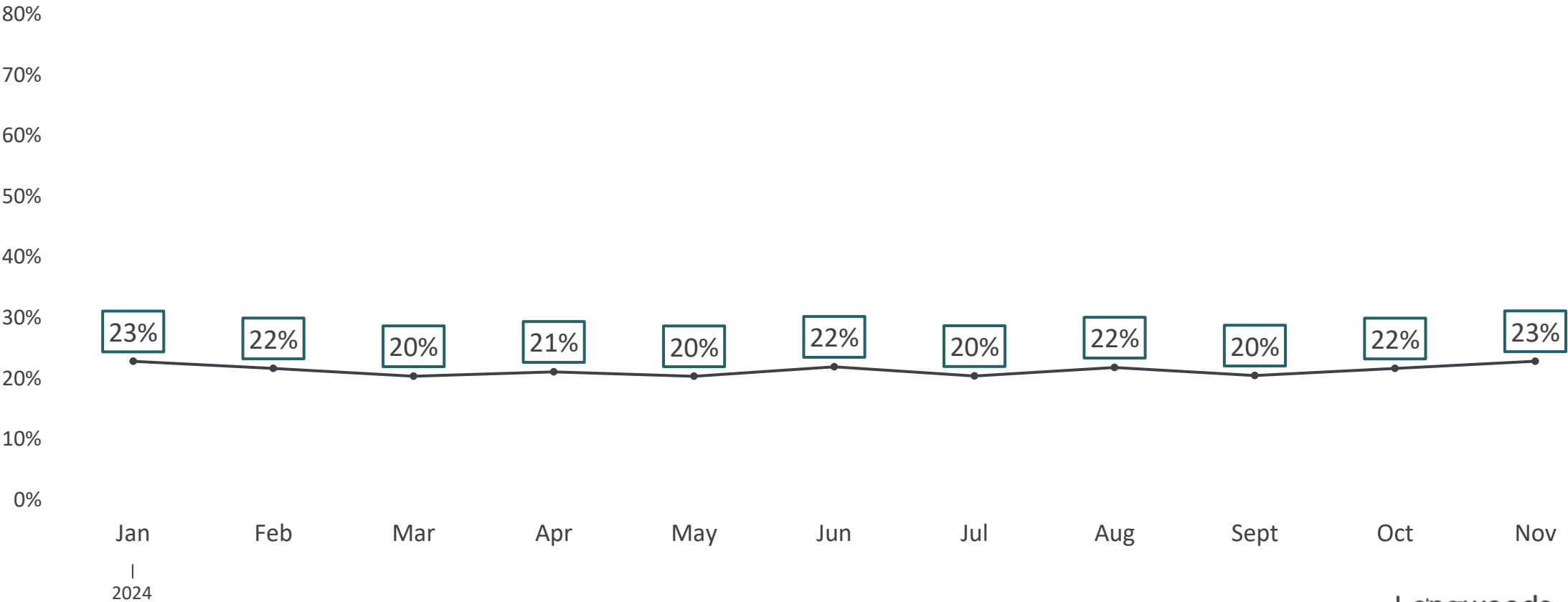
IMPACT ON TRAVEL PLANS

Impact of Gas Prices on Decisions to Travel in Next Six Months



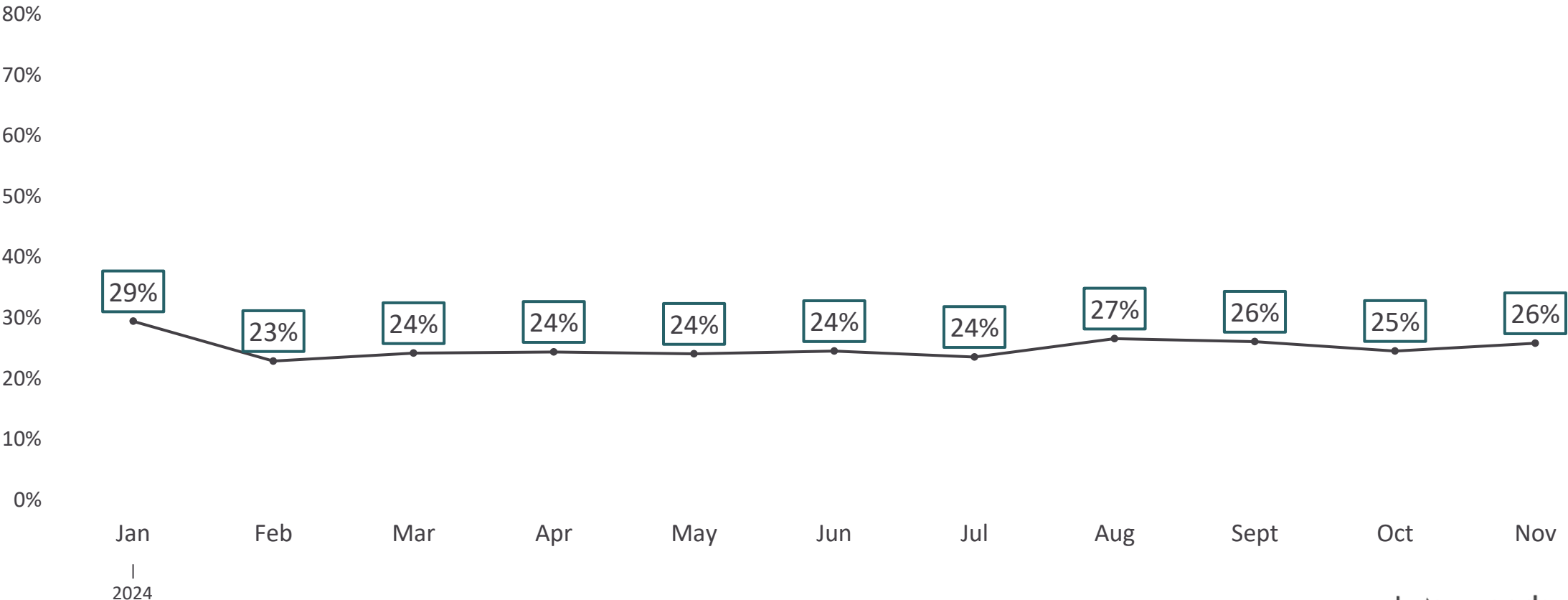
IMPACT ON TRAVEL PLANS

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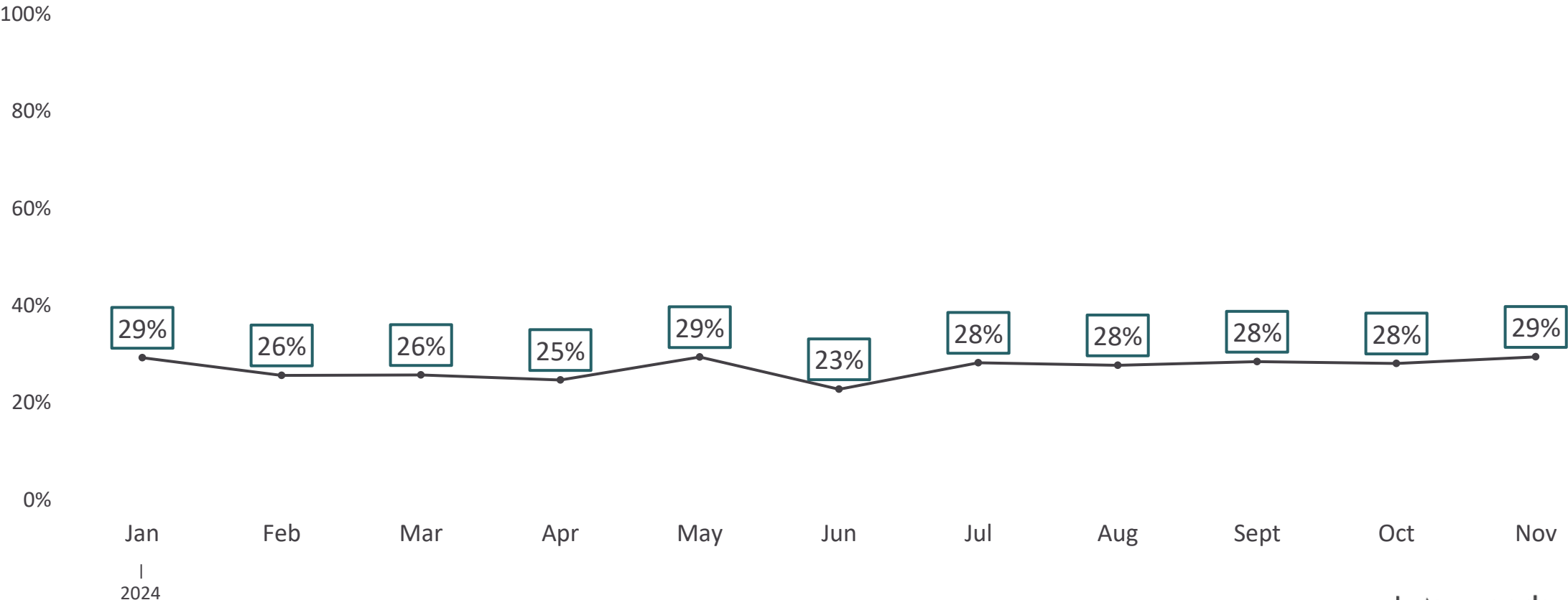
IMPACT ON TRAVEL PLANS

Indicated that Airfare Prices Would Greatly Impact their Decision to Travel in the Next Six Months



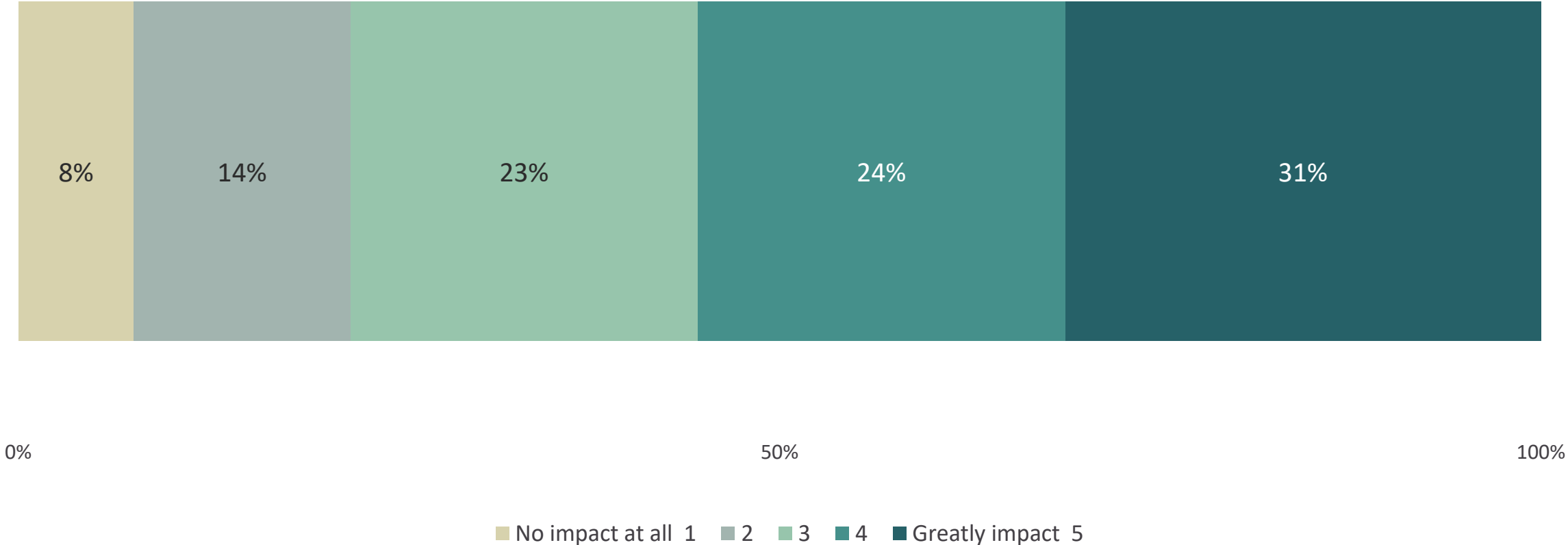
IMPACT ON TRAVEL PLANS

Indicated that Concerns About Personal Financial Situation Would Greatly Impact their Decision to Travel in the Next Six Months



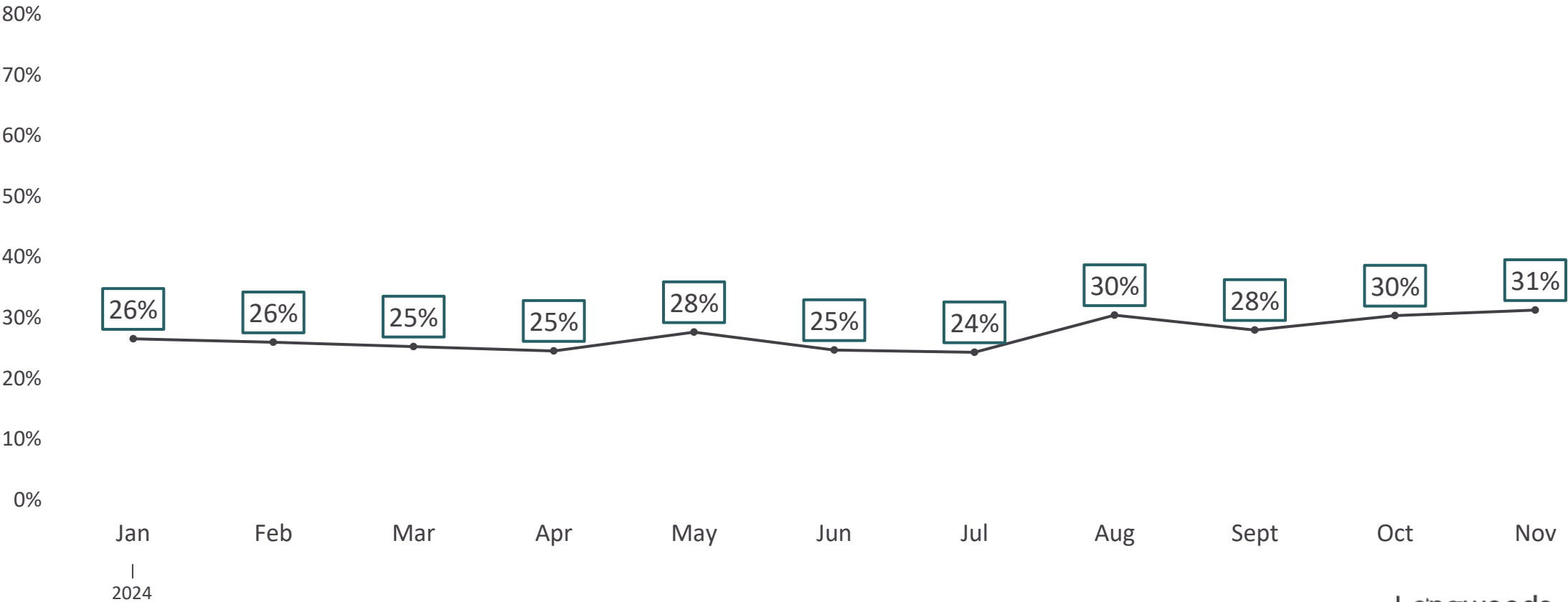
IMPACT ON TRAVEL PLANS

Impact of Inflation on Decisions to Travel in Next Six Months



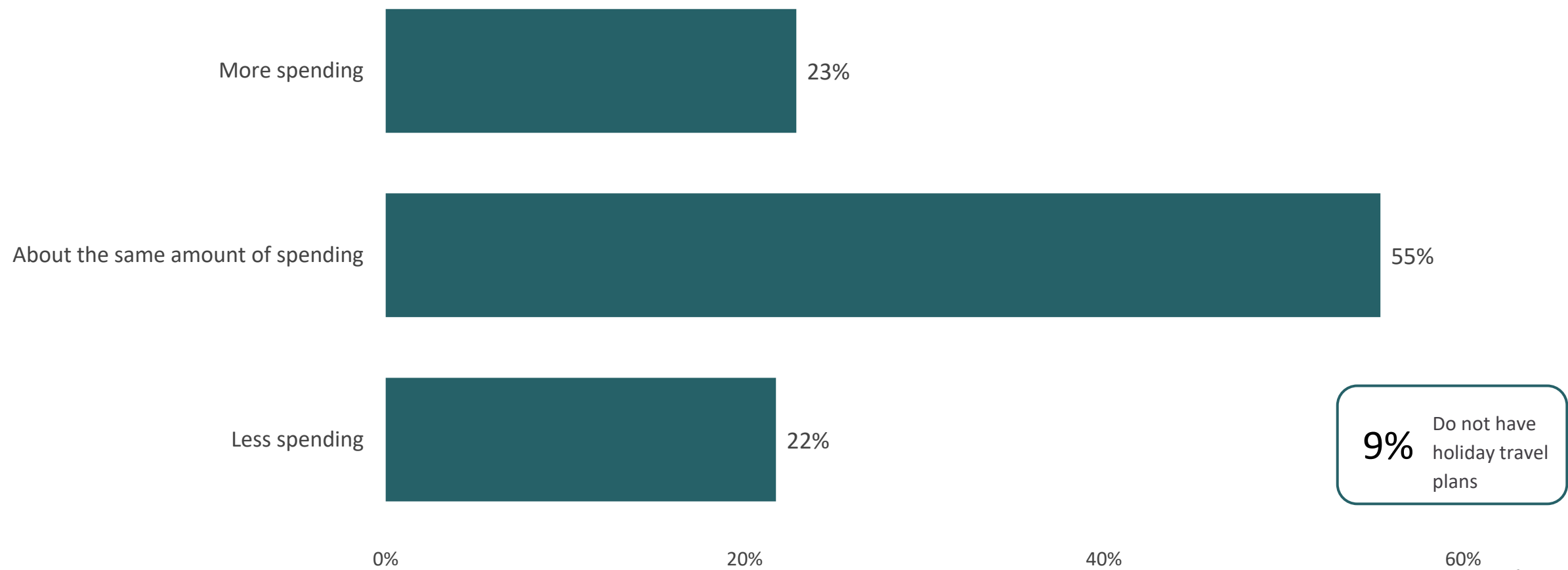
IMPACT ON TRAVEL PLANS

Indicated that Inflation Would Greatly Impact their Decision to Travel in the Next Six Months



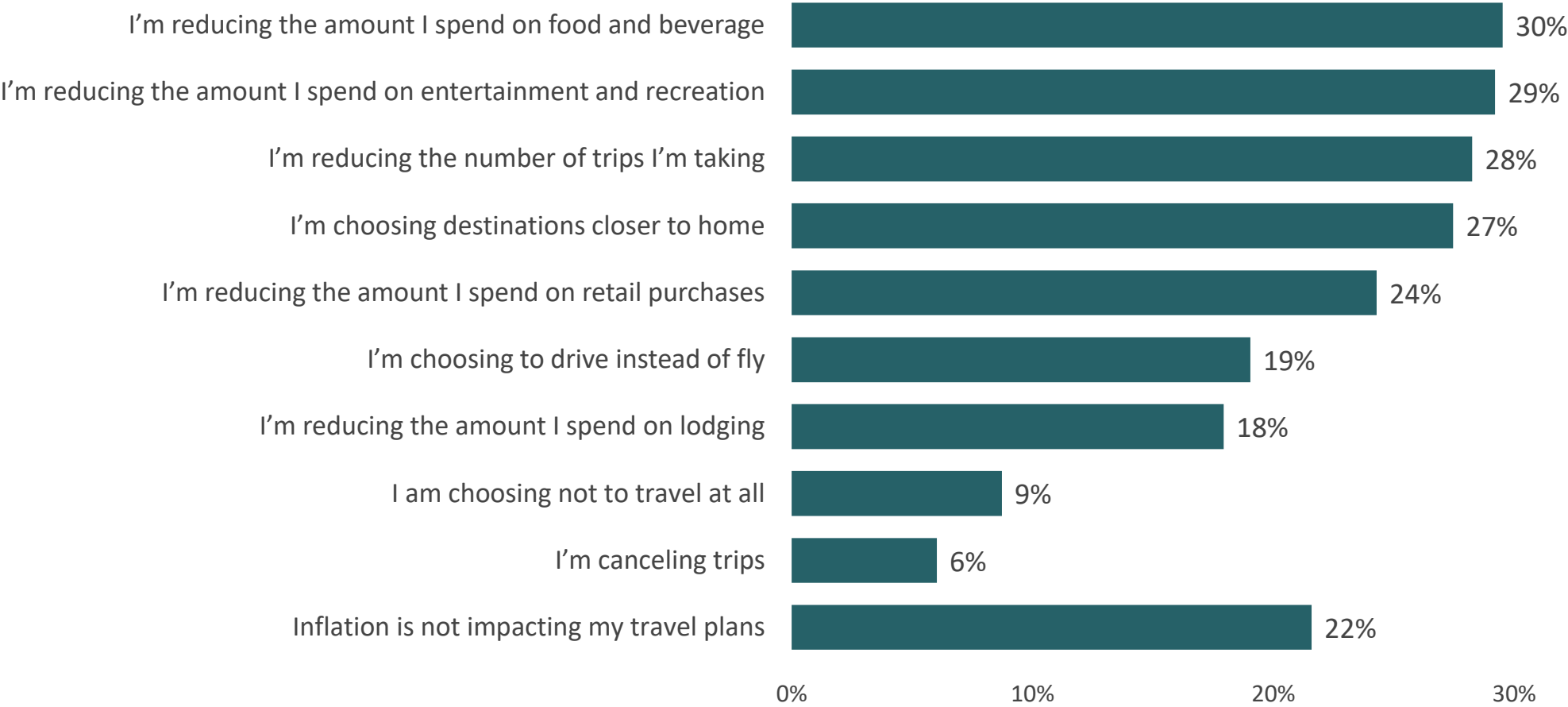
IMPACT ON TRAVEL PLANS

Compared to last year, how much do you plan to spend on travel this holiday season?



IMPACT ON TRAVEL PLANS

Impact of Inflation on Travel Plans



Key Learning:

**For American Travelers:
Travel has shifted from a WANT to a NEED!**



NOT this...

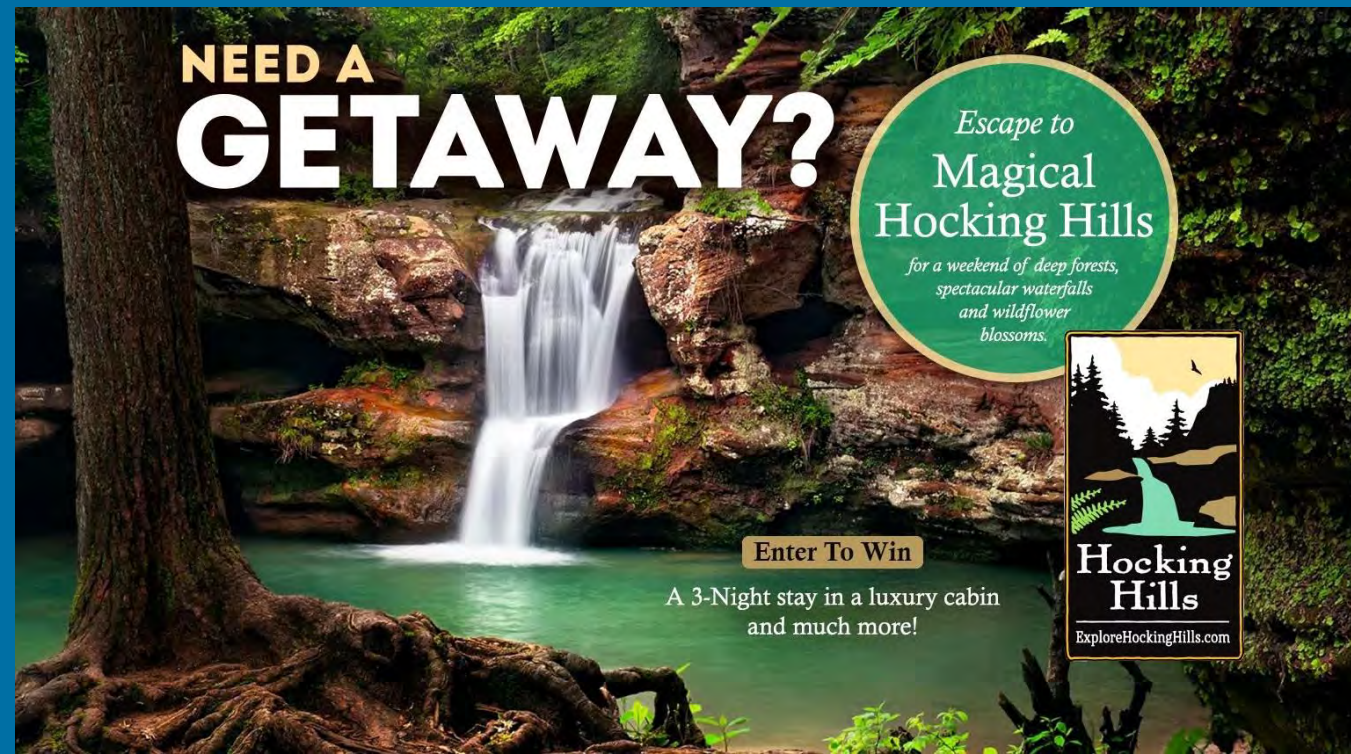
**Opportunity:
Play into that NEED in your marketing!**



Book Flights At Southwest Airlines Reservations

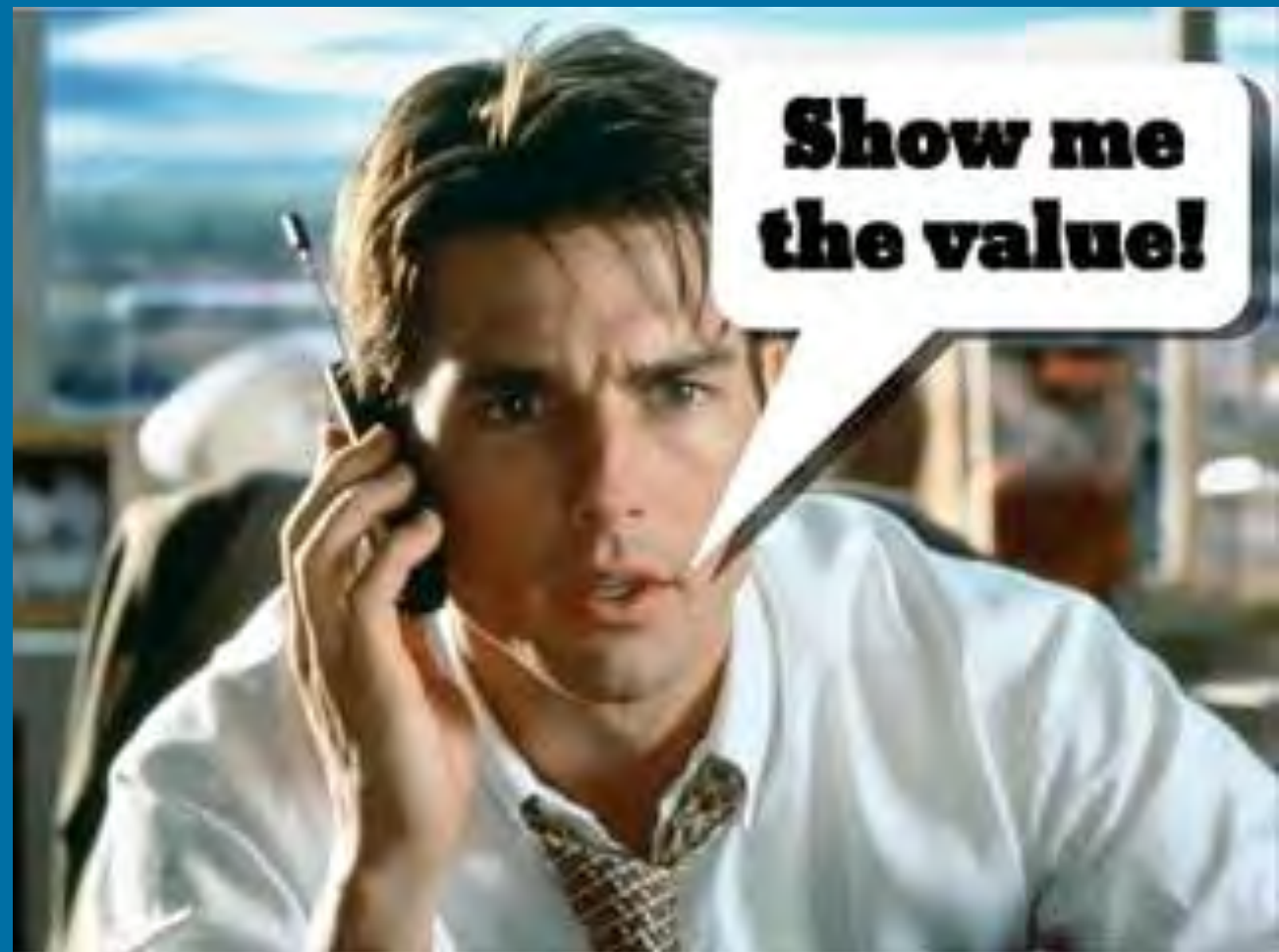
But this...

Opportunity: Play into that **NEED** in your marketing!



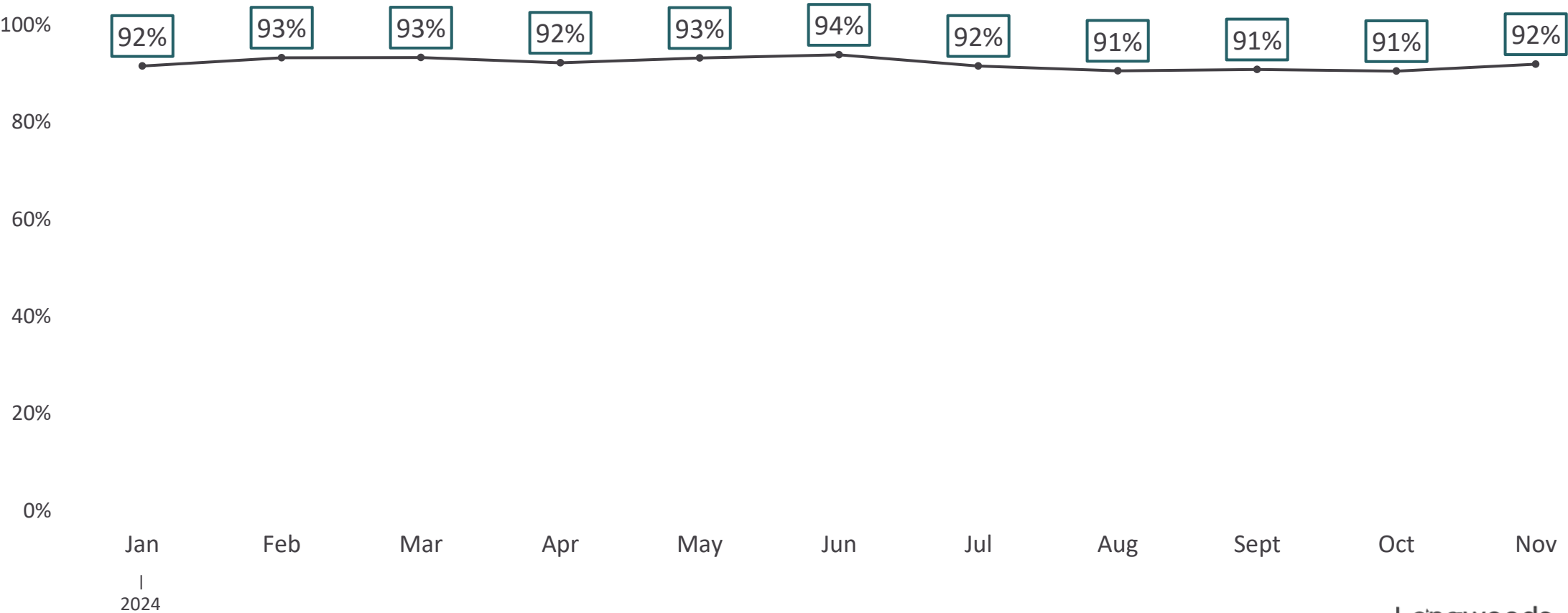
01

**Don't Deep
Discount... Show
Value!**



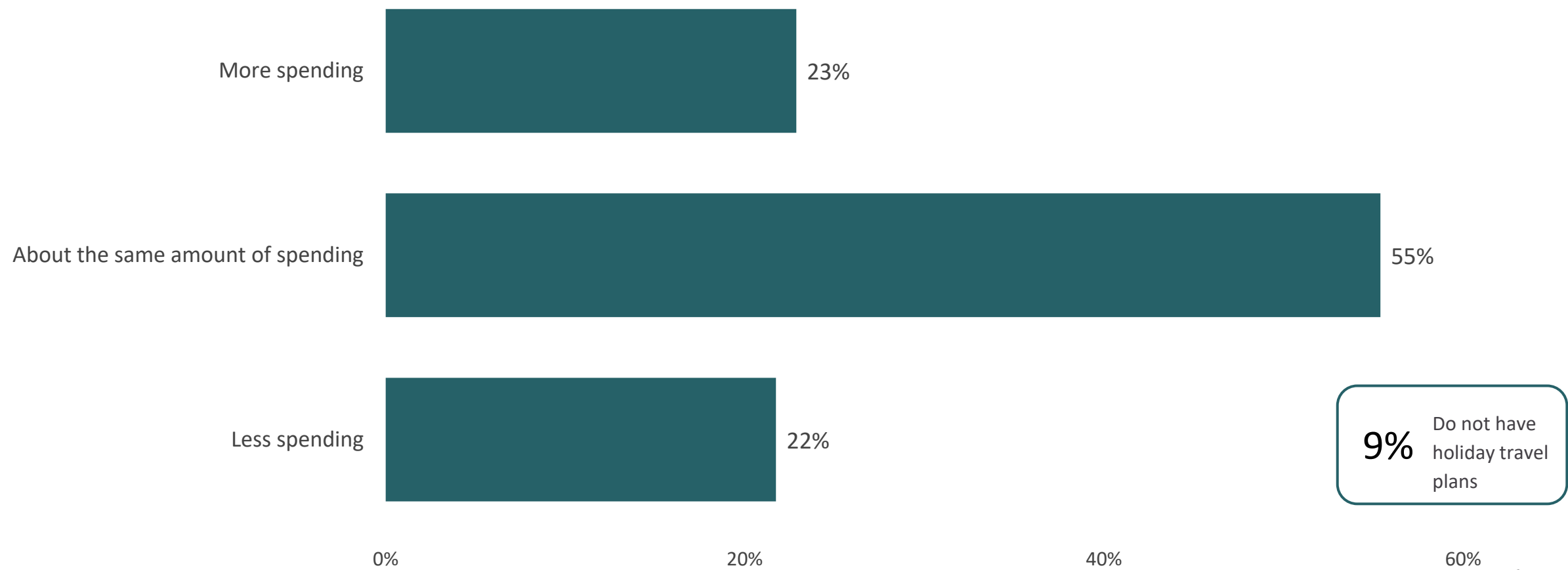
IMPACT ON TRAVEL PLANS

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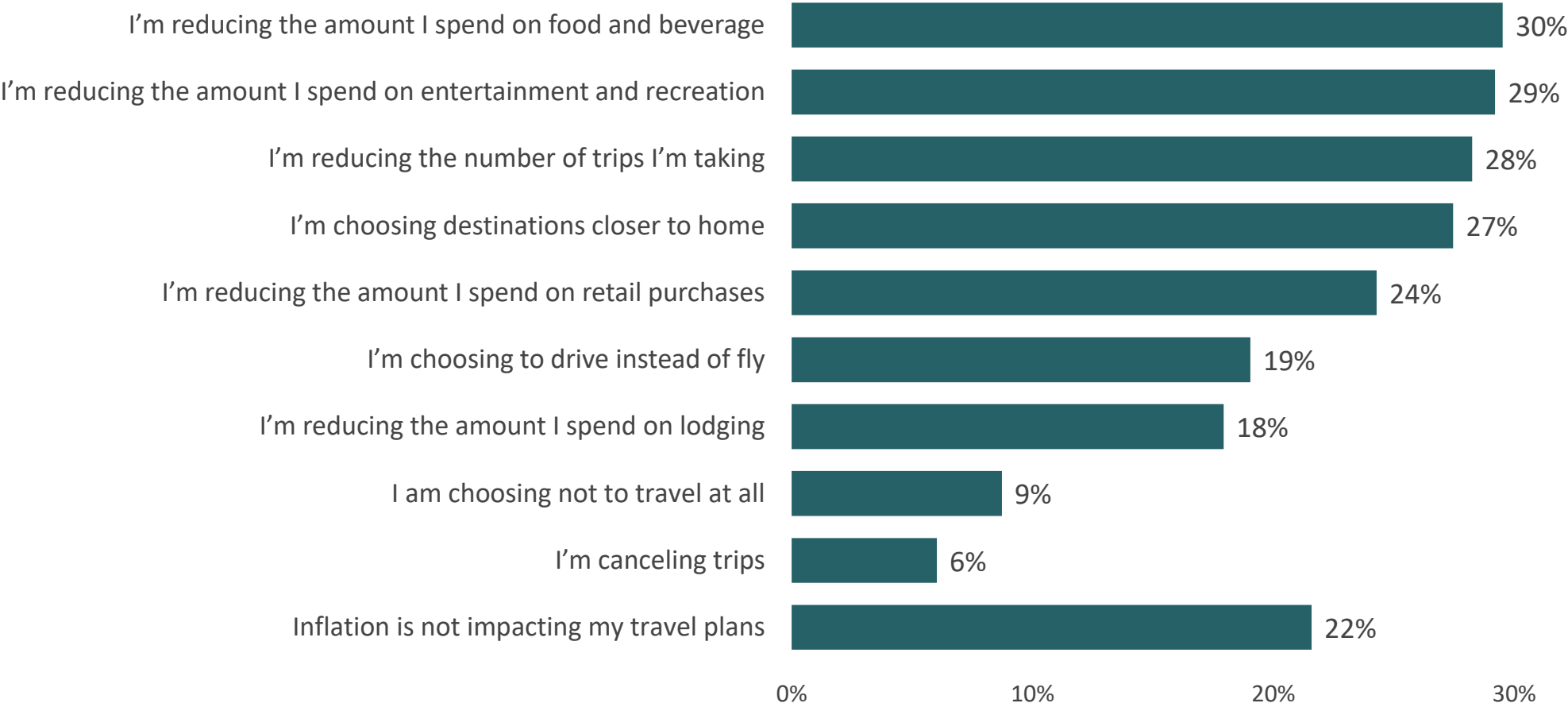
IMPACT ON TRAVEL PLANS

Compared to last year, how much do you plan to spend on travel this holiday season?



IMPACT ON TRAVEL PLANS

Impact of Inflation on Travel Plans



01

Everything costs more... They are still travelling but want a deal...

Promotions... not Deep Discounts...

Drive Value to Retain Rate!



02

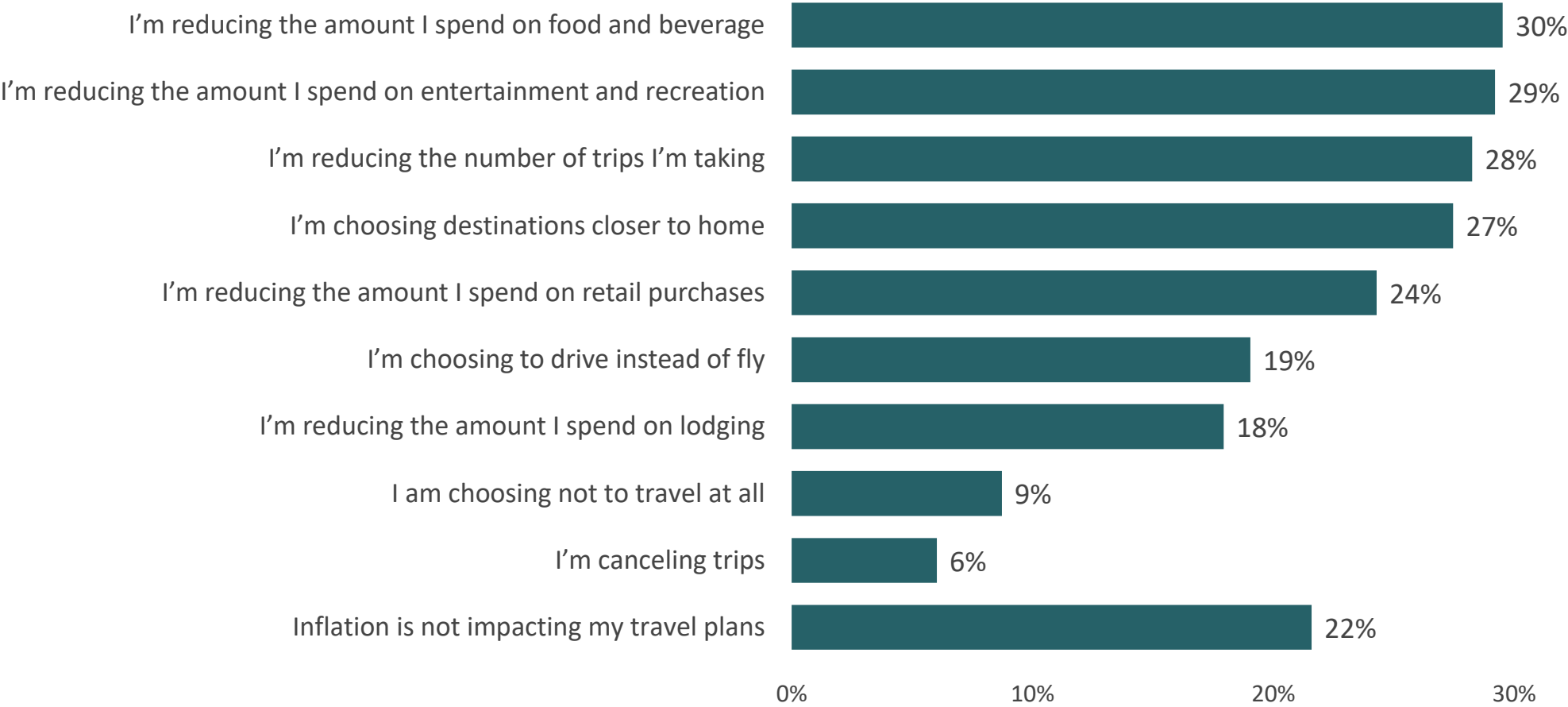
ROAD TRIPS!!!

On the Rise Since
Well Before COVID!



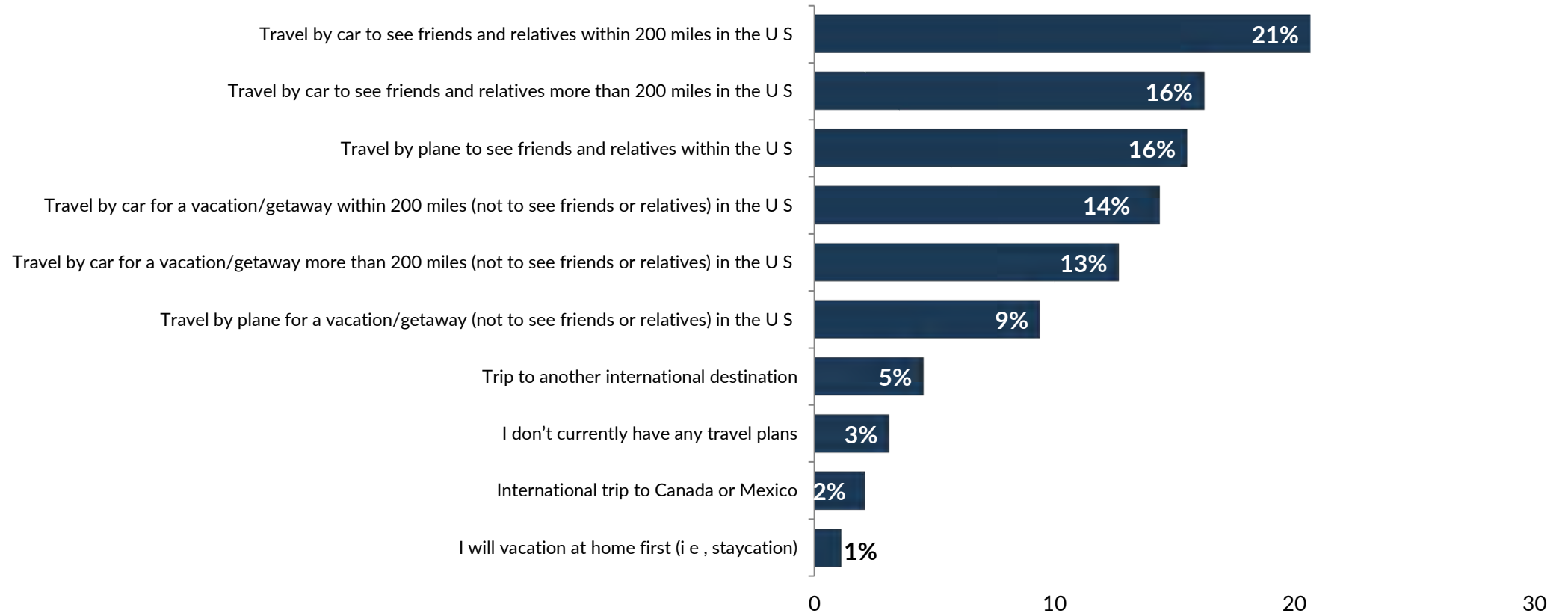
IMPACT ON TRAVEL PLANS

Impact of Inflation on Travel Plans



IMPACT ON TRAVEL PLANS

Next Trip Travelers Will Take



IMPACT ON TRAVEL PLANS

Activities Travelers Plan to Do on Next Leisure Trip



2024 Q1-Q3 Louisiana Overnight Trips: Transportation

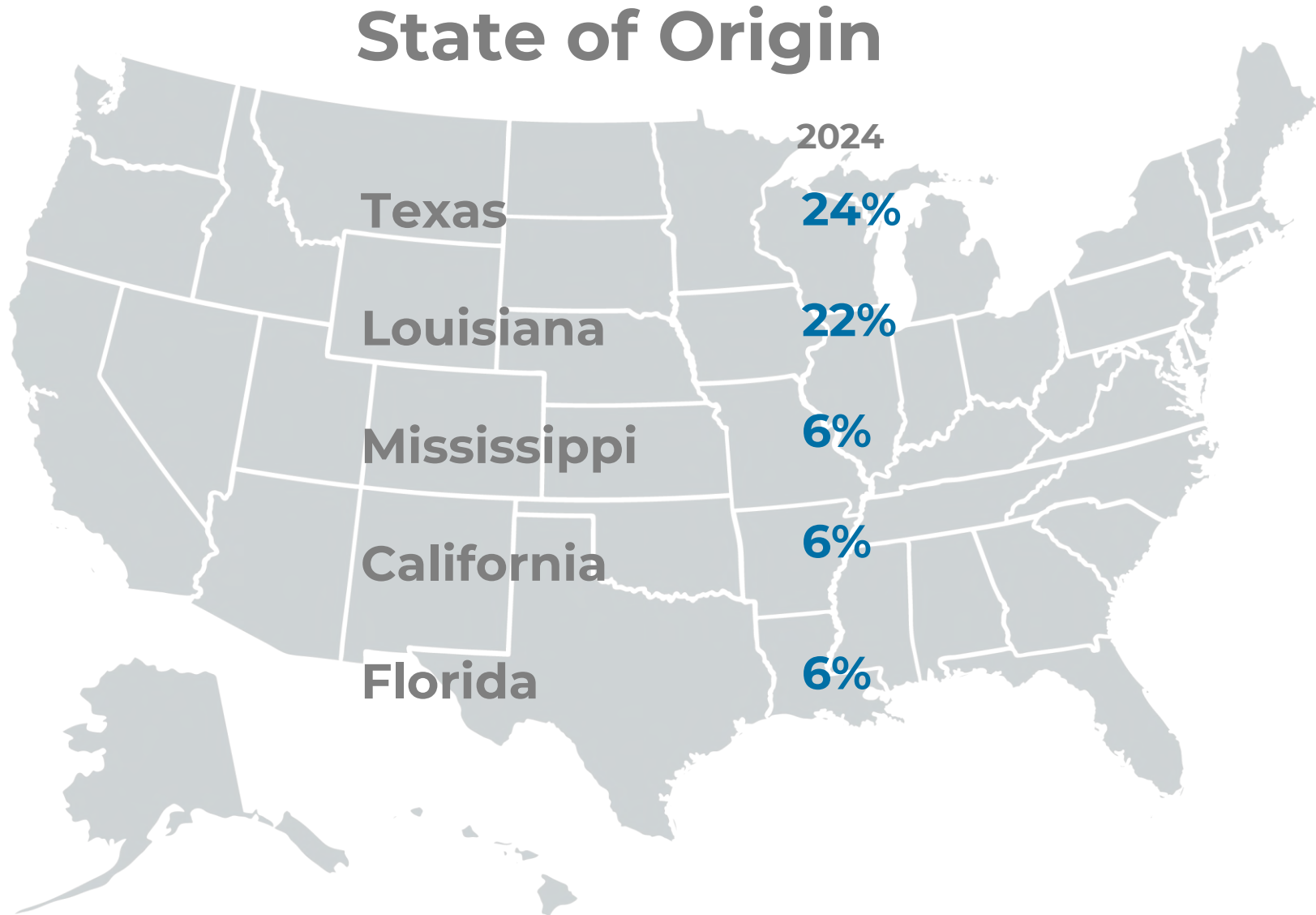


69% of Louisiana overnight trips in 2024 involved travelers driving their own cars/trucks to the destination.



23% flew on a plane.

2024 Q1-Q3 Louisiana Overnight Trips: Origin Markets



Base: 2024 Overnight Trips

2024 Q1-Q3 Louisiana Overnight Trips: Origin Markets

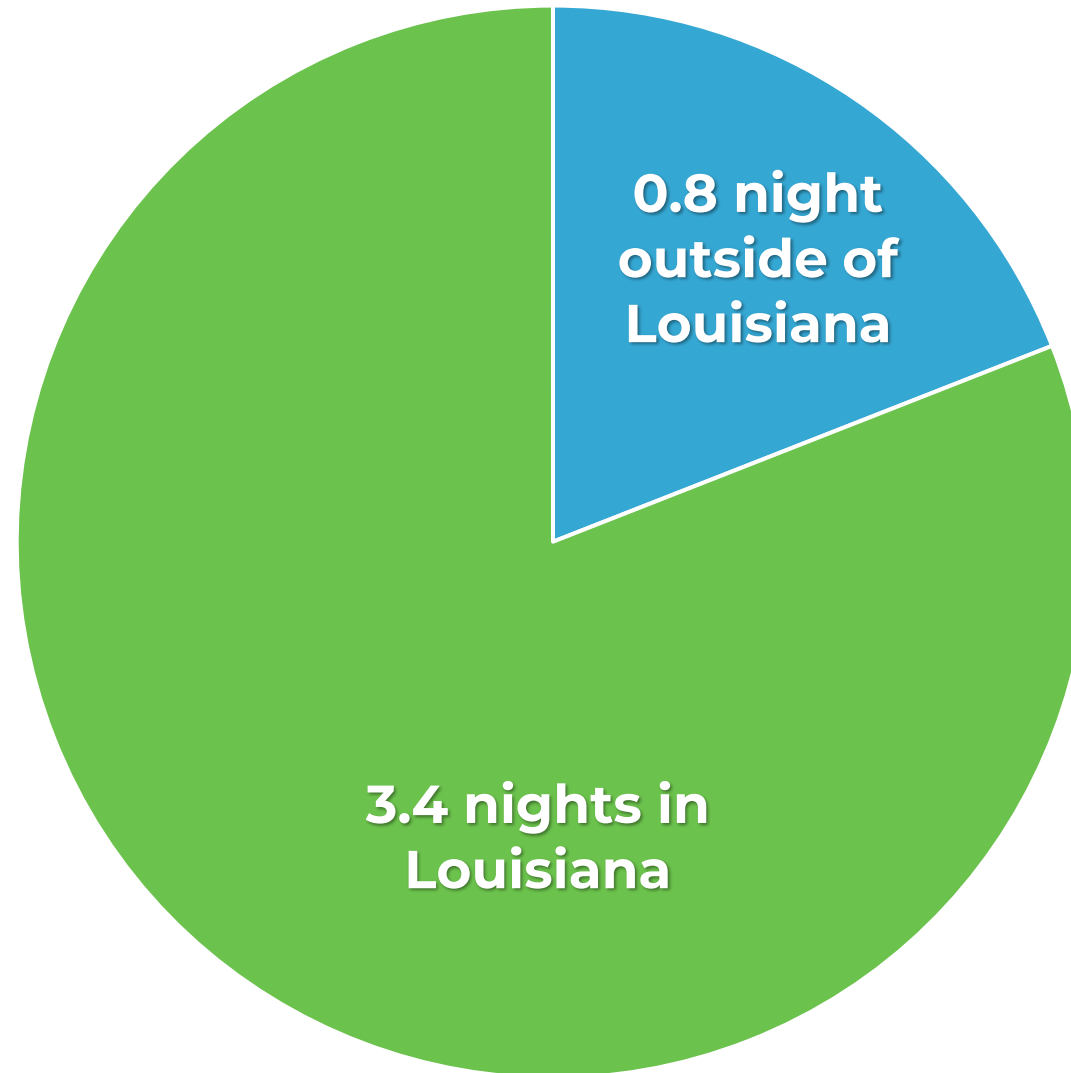
DMA of Origin

Houston, TX	9%
Dallas-Ft. Worth, TX	7%
New Orleans, LA	7%
Lafayette, LA	5%
Baton Rouge, LA	4%
Los Angeles, CA	4%
Shreveport, AR/LA/OK/TX	3%
New York, NY	3%
Atlanta, GA	3%

Base: 2024 Overnight Trips

2024 Q1-Q3 Louisiana Overnight Trips: Length of Stay

Average Length of Trip: 4.2 Nights



81% of each trip was spent within Louisiana.

Base: 2024 Overnight Trips

02

**Embrace Them
Even More!
Regional Drive
Market!
(Double Down!)**



02

Road Trips & Electric Vehicles

GermainCars

ELECTRIC VEHICLE
ROAD TRIPS



Electric Vehicle Travel

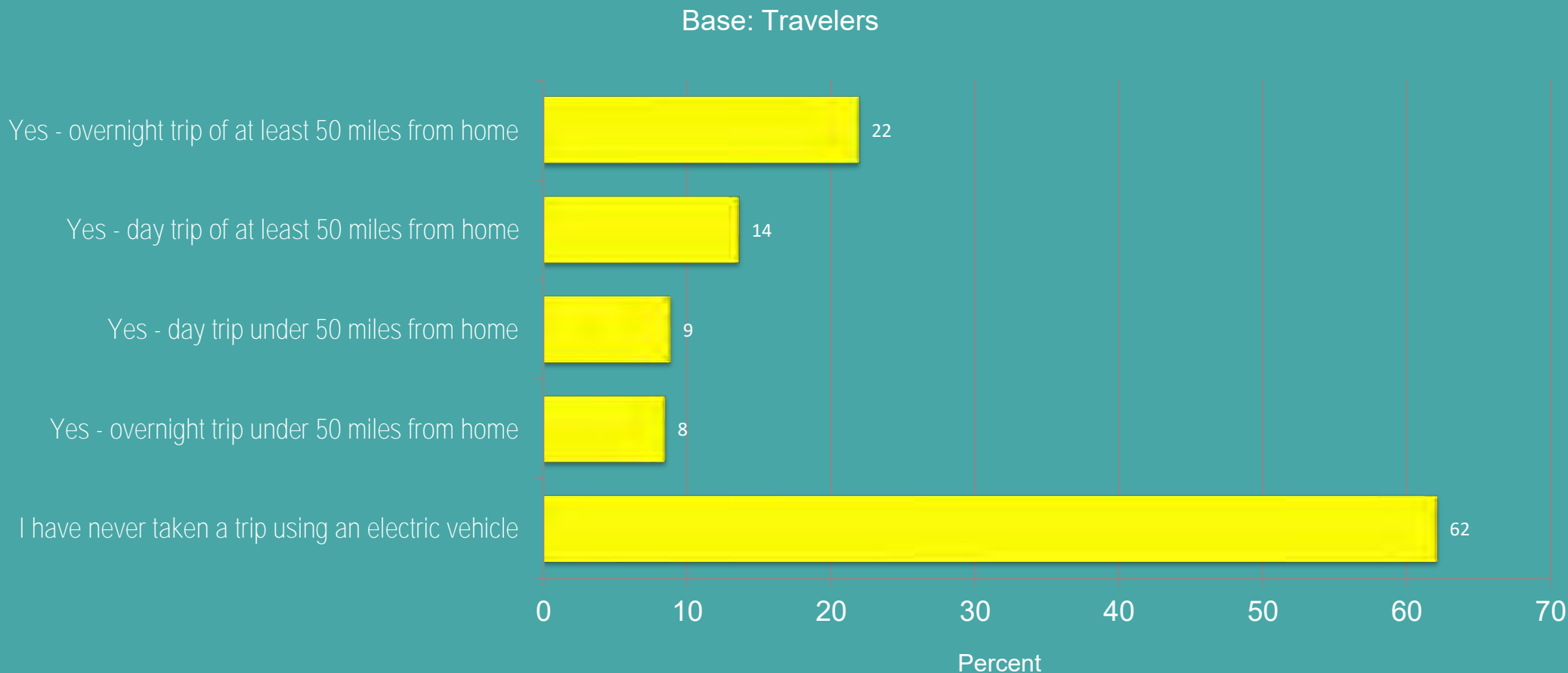
Fresh research & insights on electric vehicle road trips and travel by U.S. travelers



miles
PARTNERSHIP

Longwoods
INTERNATIONAL

Have you ever used an electric vehicle to travel on a trip?



Source: Custom Survey on EV Travel June 2024

On your next trip, how likely are you to use an EV?

Base: Travelers



Source: Custom Survey on EV Travel June 2024

miles
PARTNERSHIP

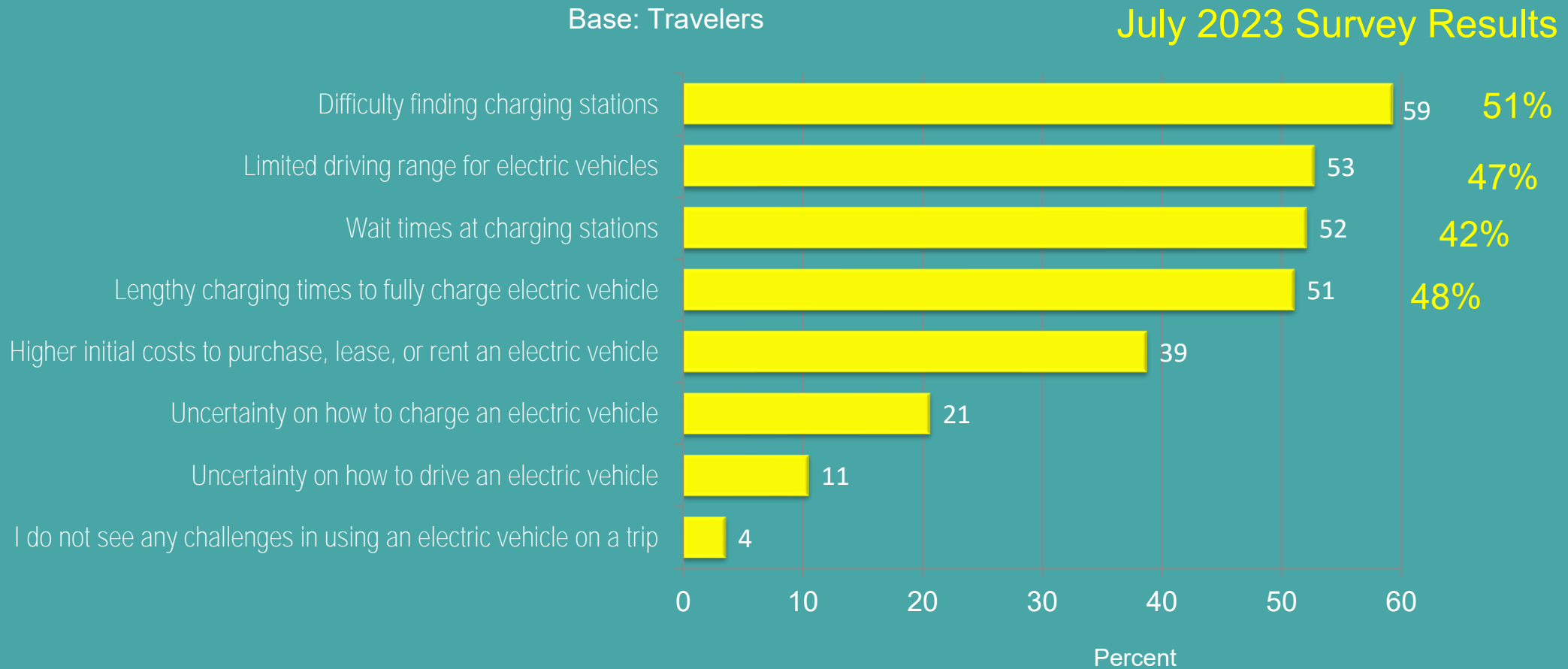
Longwoods
INTERNATIONAL

02

Are YOU EV-Ready?



In your opinion, which of the following are the primary challenges of using an electric vehicle on a trip?



Source: Custom Survey on EV Travel June 2024

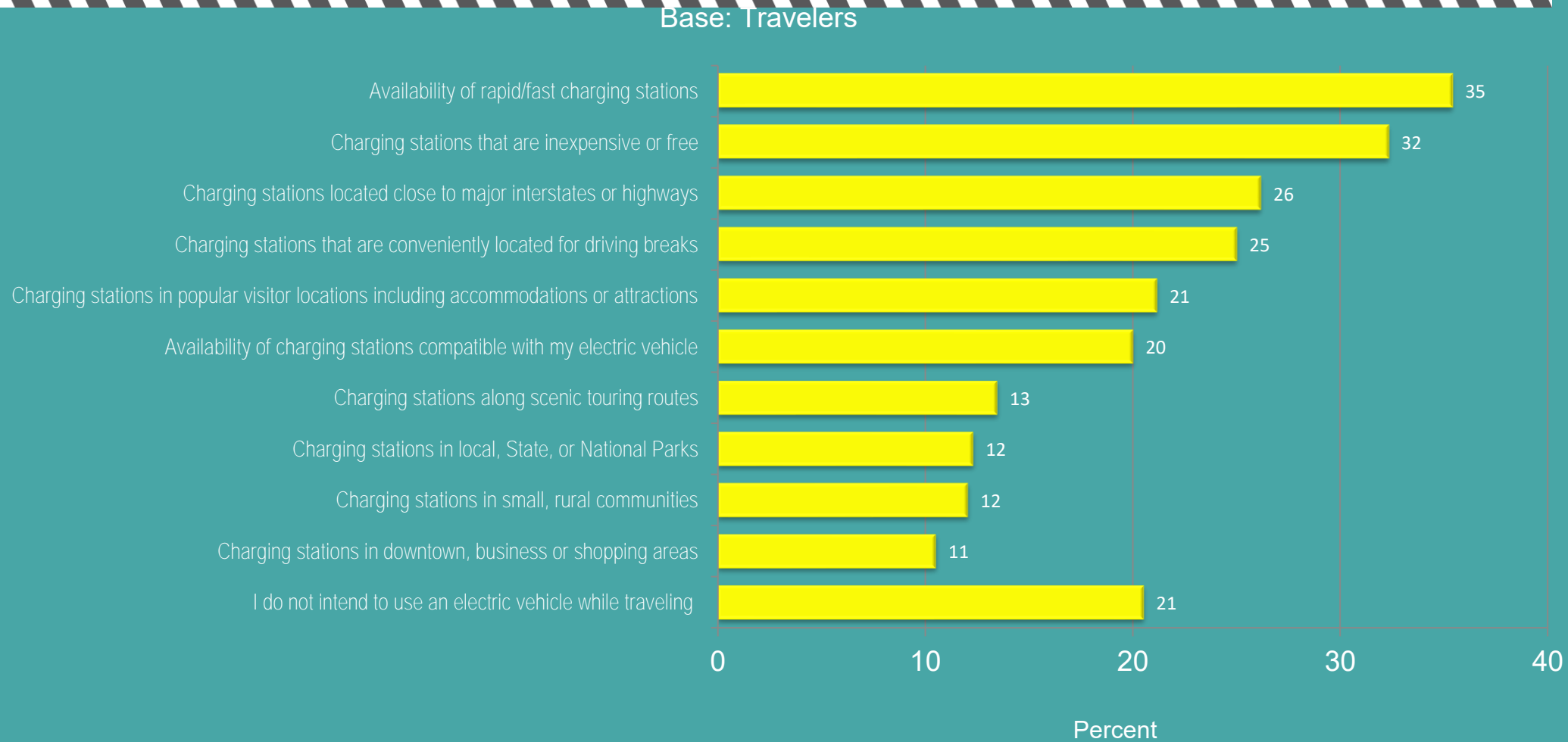
02

Despite current dip in sales, there will be a shift...

Infrastructure will be a competitive advantage!



Which of the following amenities or services would make you more likely to visit a destination in an electric vehicle?



Source: Custom Survey on EV Travel June 2024

03

The Rise Of “Gig Travel”



Opportunity to Maximize \$\$\$ By Taking Event Beyond the Venue...















SWIFTIE NIGHT OUT

A TAYLOR-THEMED
NEW ORLEANS
BAR CRAWL

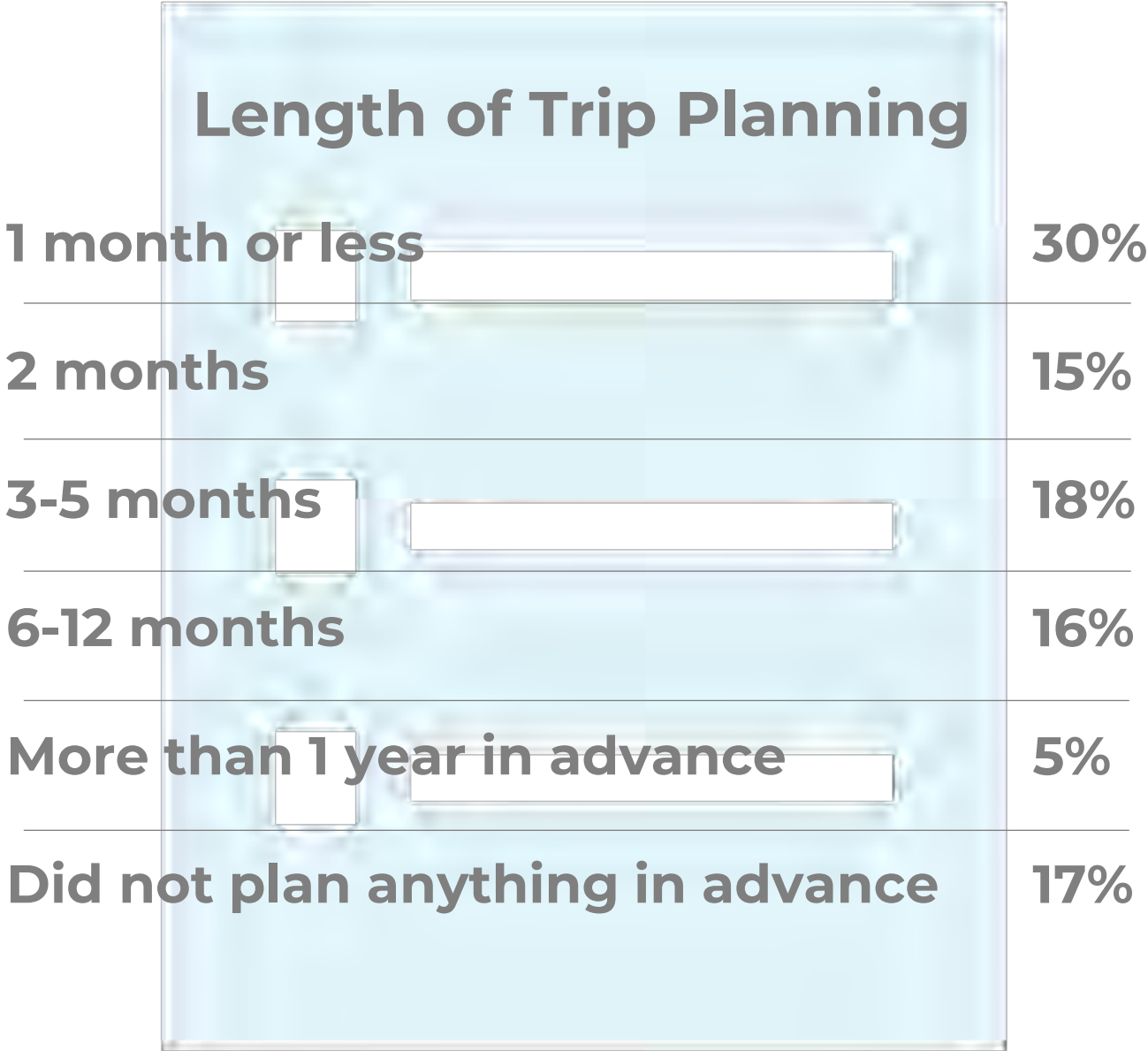


2024 Q1-Q3 Louisiana Overnight Trips: Activities

 Dining 39%	 Landmark/historic site 18%
 Shopping 31%	 Attending Celebration 17% 
 Sightseeing 24%	 Museum 16%
 Casino 24%	 Live Performances 13% 
 Bar/nightclub 23%	 Swimming 13%

Base: 2024 Overnight Trips

2024 Q1-Q3 Louisiana Overnight: Trip Planning



Base: 2024 Overnight Trips

Opportunity to Maximize \$\$\$ By Taking Event Beyond the Venue...



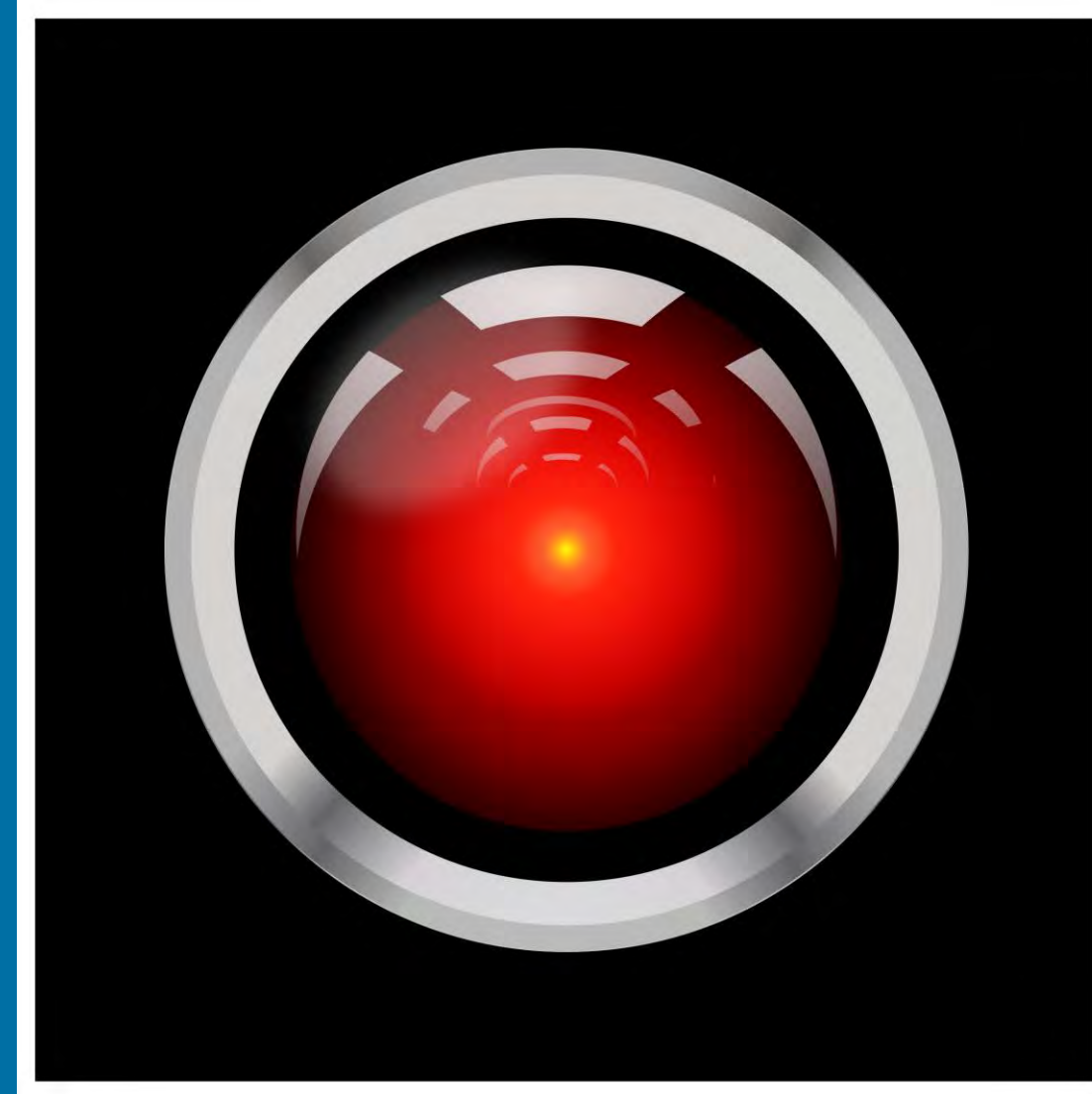
03

**Requires a lot of
coordination and
partnership but great
way to extend visitor
experience and spend!**



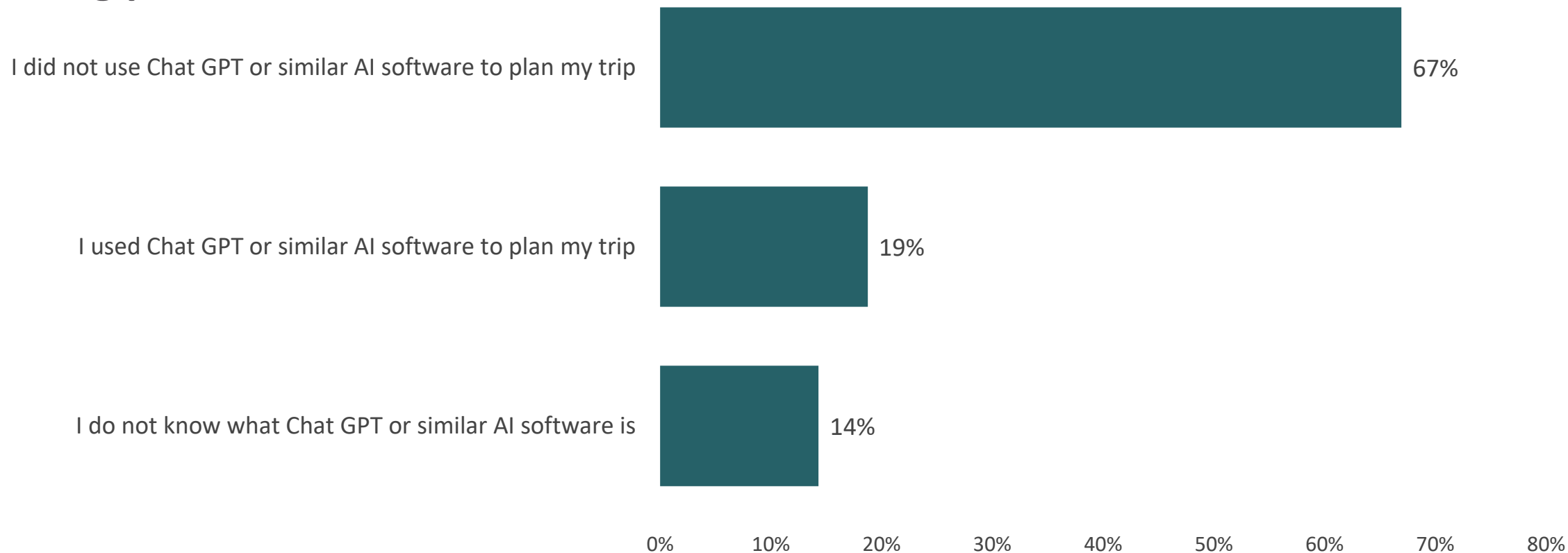
04

**Were You Hoping I
Would Not Say
Artificial Intelligence?**



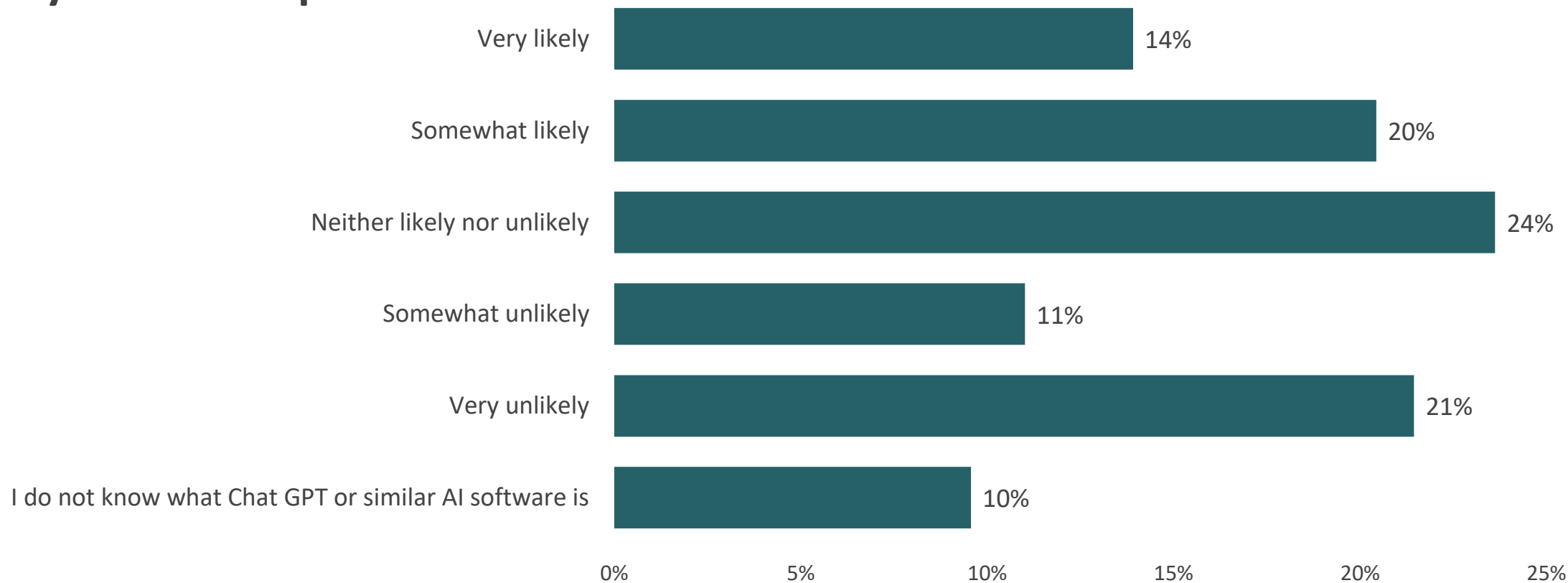
IMPACT ON TRAVEL PLANS

In the last six months, have you used Chat GPT or similar AI software in the trip planning process?



IMPACT ON TRAVEL PLANS

How likely are you to use Chat GPT or similar AI software in the planning process for your next trip?



04

**With generative AI,
your roles as creators
of content & factual
accuracy is more
important than ever!
Be the trusted source!**

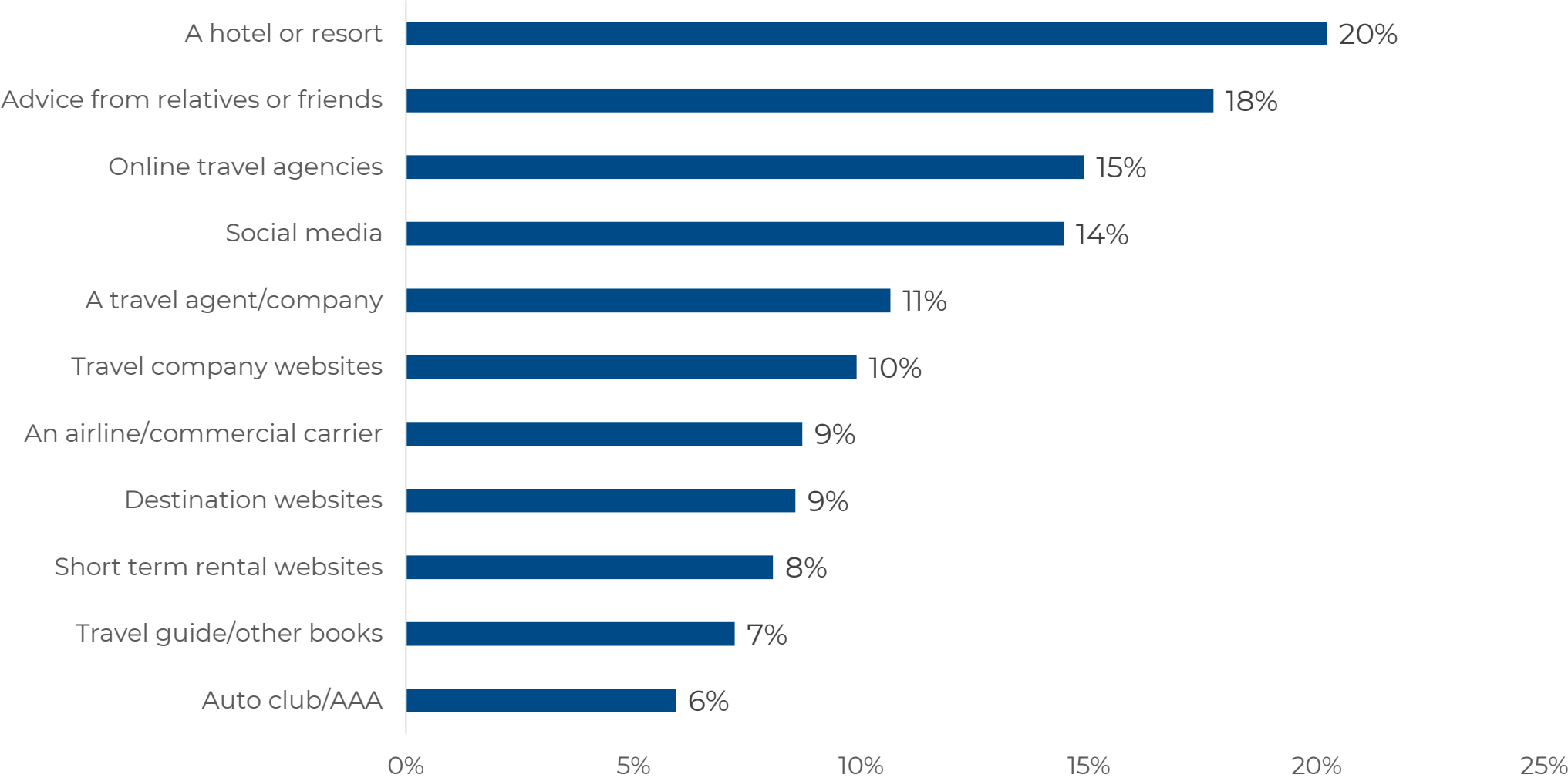


04

While the jury is still out as to how much travelers will intentionally seek out AI to plan their travels, most travel brands are investing in and implementing AI tools on their platforms...



2024 Q1-Q3 Louisiana Overnight Trips: Information Sources



Base: 2024 Overnight Trips

04

The reality is... most travelers are likely not aware when they are interacting with AI powered tools! Don't be muted because they cannot find your content!



05

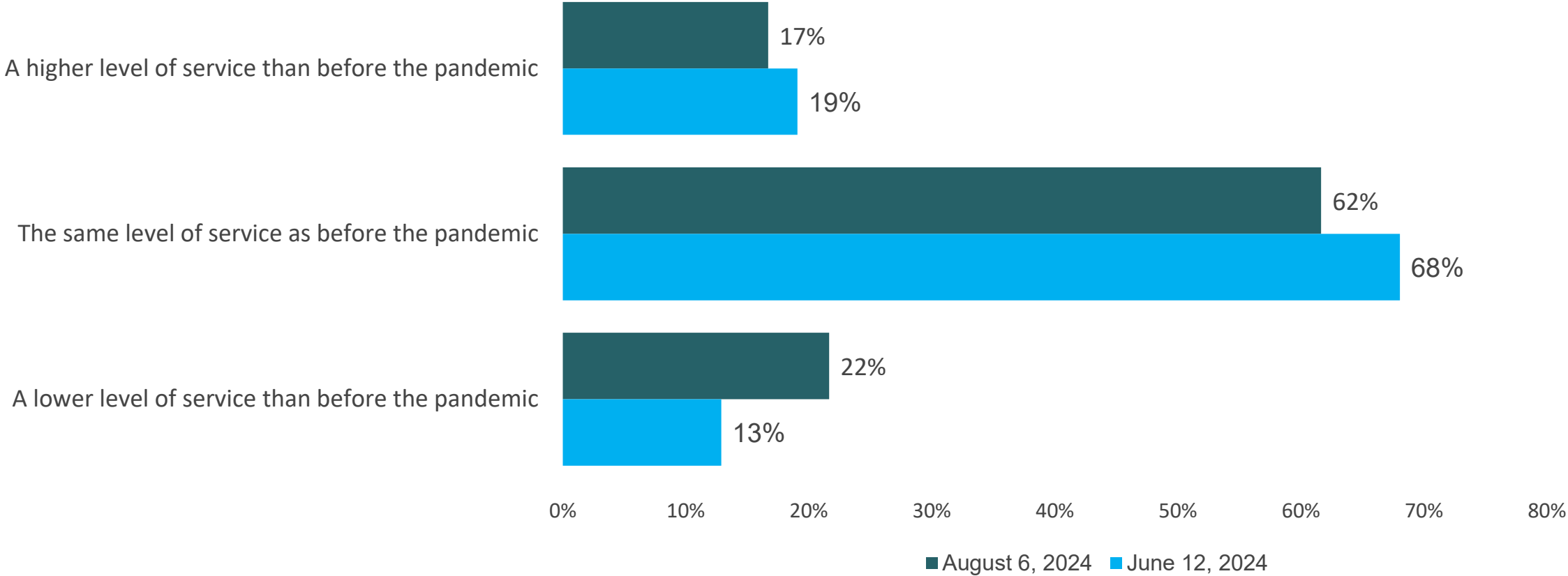
Heightened Expectation of Service!

Despite Ongoing
Workforce Challenge...



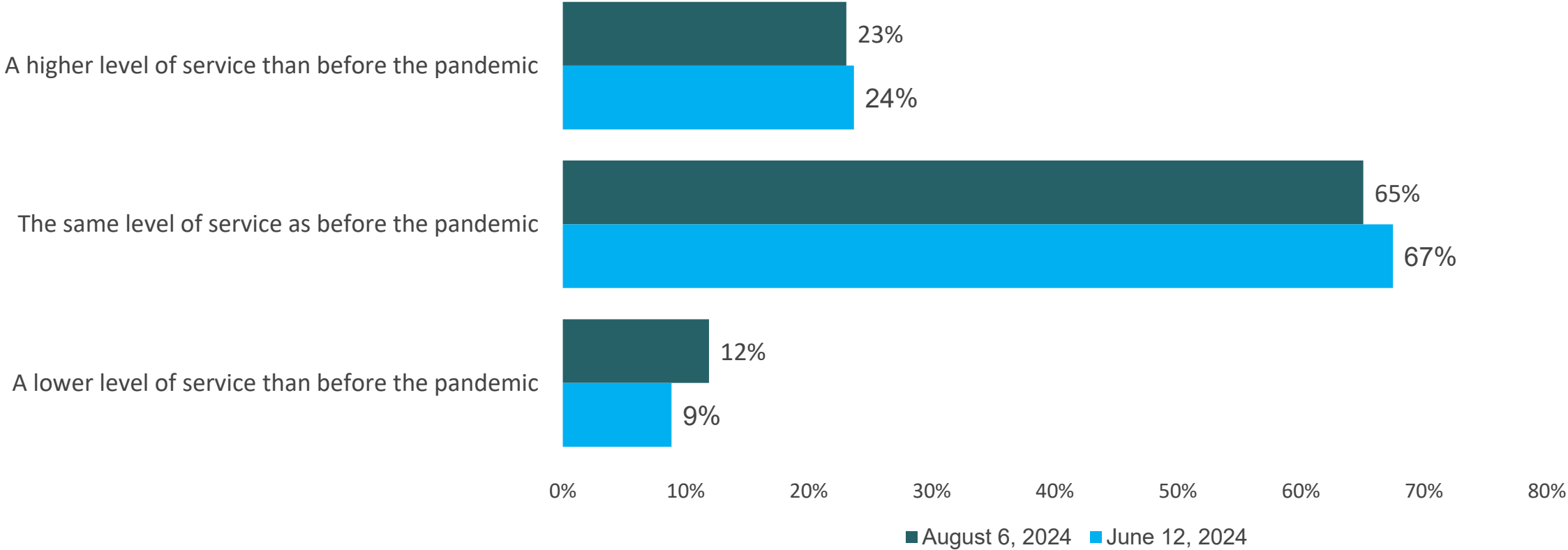
IMPACT ON TRAVEL PLANS

On your most recent trip in the last three months, what level of service did you receive from tourism and hospitality businesses?



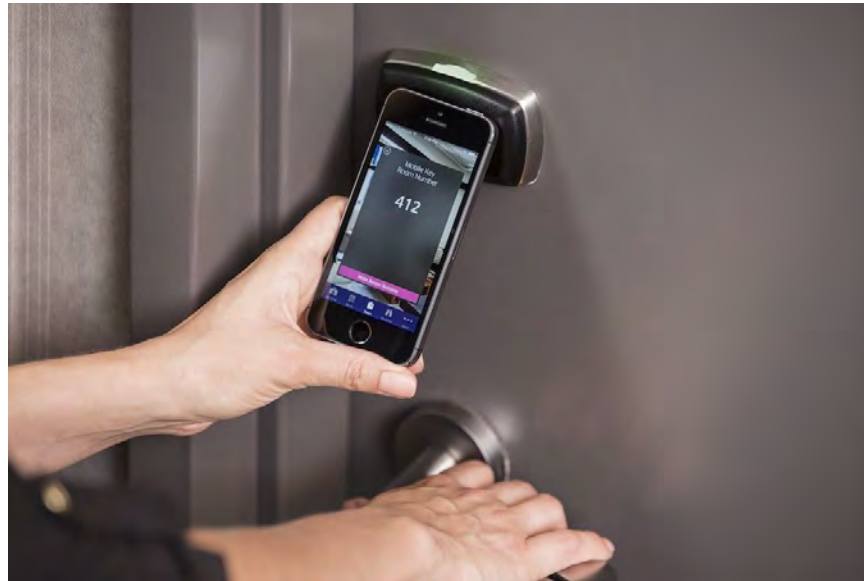
IMPACT ON TRAVEL PLANS

When traveling in the next three months, what level of service do you expect to receive from tourism and hospitality businesses?



Looking Ahead...

- Manage Expectations & Lean Into Technology!



06

Heightened Expectation of Flexibility!

2-3% of trips cancel...
Even more change...



06

**Heightened
Expectation of
Flexibility!**



As We All Know...

**“LIFE IS WHAT HAPPENS
WHILE YOU ARE BUSY
MAKING OTHER PLANS.”**

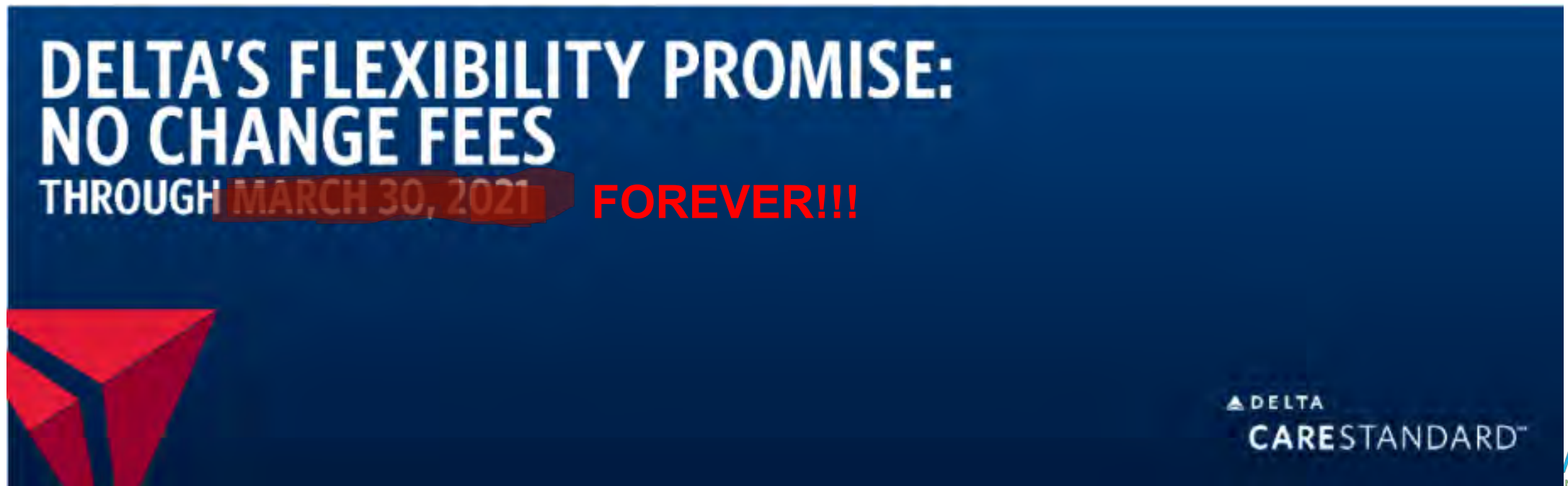
-John Lennon

@KTHEDESIGNER



What We Learned During COVID...

Travel Brands could be flexible!



...But How Quickly We Forgot

- **Change Fees Are Back...**
- **72 Hour Cancellation Policies Are Back...**



Meet Travelers in the Middle...

Those who do, will earn their loyalty...



Plans change. So have our policies.

To give you greater peace of mind, you can now change or cancel this reservation through our website or mobile app, **free of charge**, up to 24 hours prior to your arrival date.



06

**Travelers overall are
not unreasonable...**

**An opportunity to
win their hearts and
loyalty!**

**Low fares
and
flexibility
for all.**

- ✓ Two bags fly free.*
- ✓ No change[†] and no cancel fees.[‡]
- ✓ Rapid Rewards® points don't expire.
- NEW** Flight credits don't expire.[§]

*1st and 2nd checked bags. Weight and size limits apply. †Fare difference may apply. ‡Failure to cancel a reservation at least 10 minutes prior to scheduled departure may result in forfeited travel funds. §Flight credits unexpired on or created on or after July 28, 2022 do not expire and will show an expiration date until our systems are updated. Visit Southwest.com/experience for details.

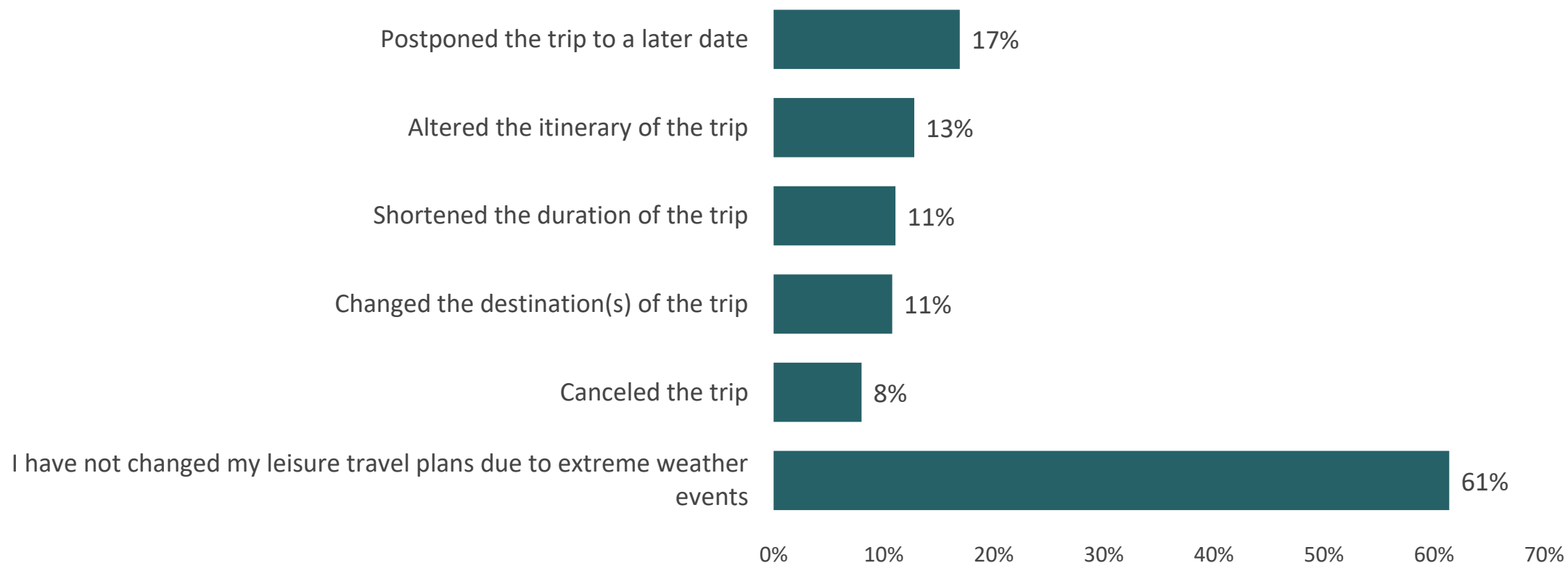
07

Can We Talk About the Weather?



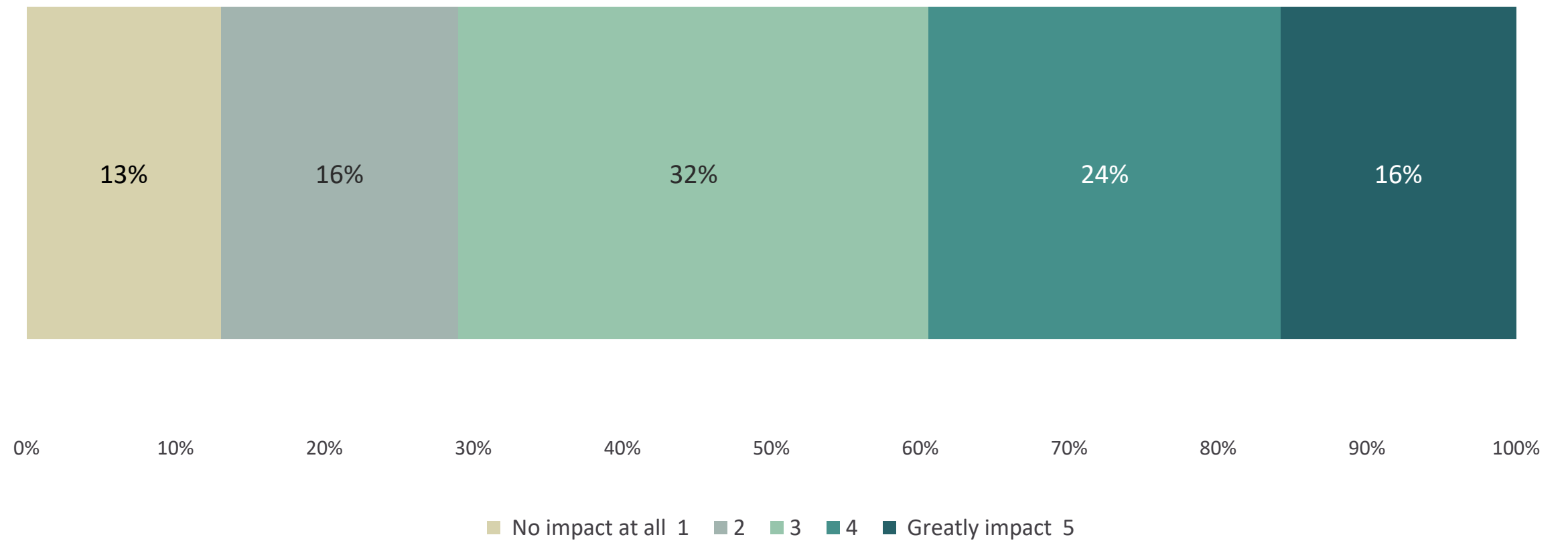
IMPACT ON TRAVEL PLANS

In the past year, have you changed your leisure travel plans due to extreme weather events, such as extreme heat, drought, flooding, hurricanes, etc?



IMPACT ON TRAVEL PLANS

Thinking about your leisure travel plans in the next 12 months, to what extent does the likelihood of extreme weather events at a destination impact your decision to travel there?



07

**Will the Growing
Frequency of
Extreme Weather
Events Create New
Travel Patterns?**



08

Larger Party Sizes!



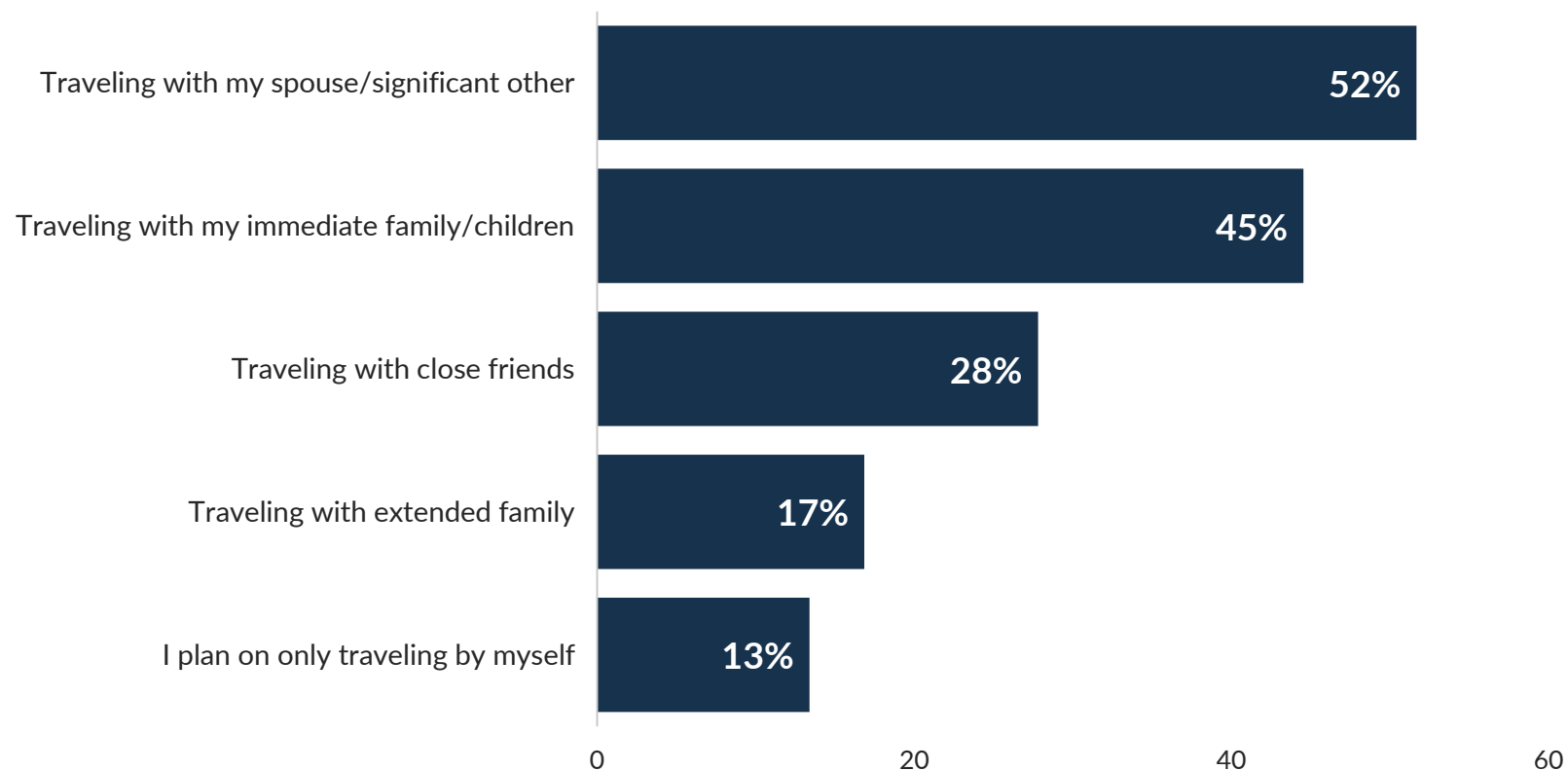
Looking Ahead...

- **Family Travel, Multi-Generational Travel, & Friends “Togetherring” Are All On The Rise!**



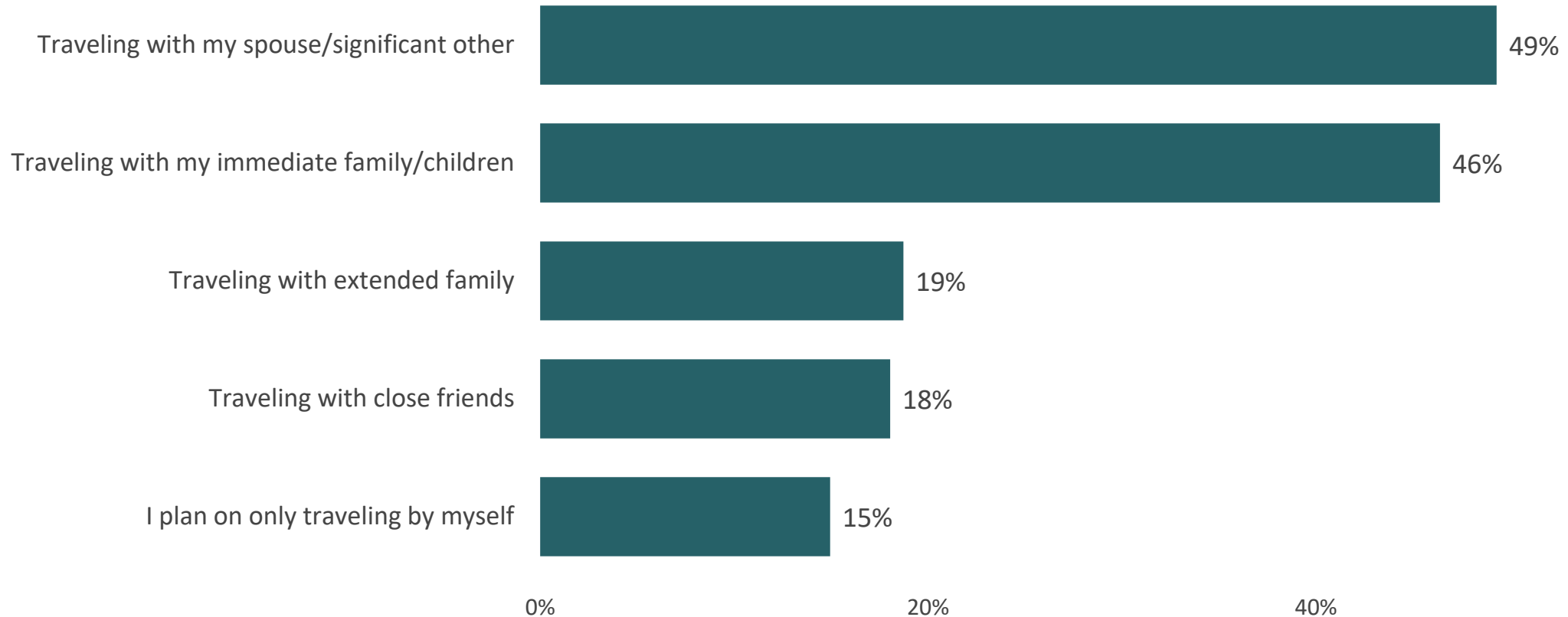
IMPACT ON TRAVEL PLANS

When thinking of travel this summer, what travel plans do you have that involve traveling with others?



IMPACT ON TRAVEL PLANS

When thinking of travel this holiday season, what travel plans do you have that involve traveling with others?



3.1

**Average Overnight Trip
Party size**

US Norm: 2.8



08

Market & Accommodate!



Looking Ahead...

- **Multi-Family rooms and floors, larger dining group accommodations, more home rentals, transportation... They want turnkey!**



08

Big Opportunity!

**But May Not Be
for All...**



09

**Expectations of
Locals Are Now
More Important
Than EVER!**



2024 Q1-Q3 Louisiana Overnight Trips: Satisfaction



71%

of overnight travelers were very satisfied with their overall trip experience



*Very satisfied = selected top box on a five point scale
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

09

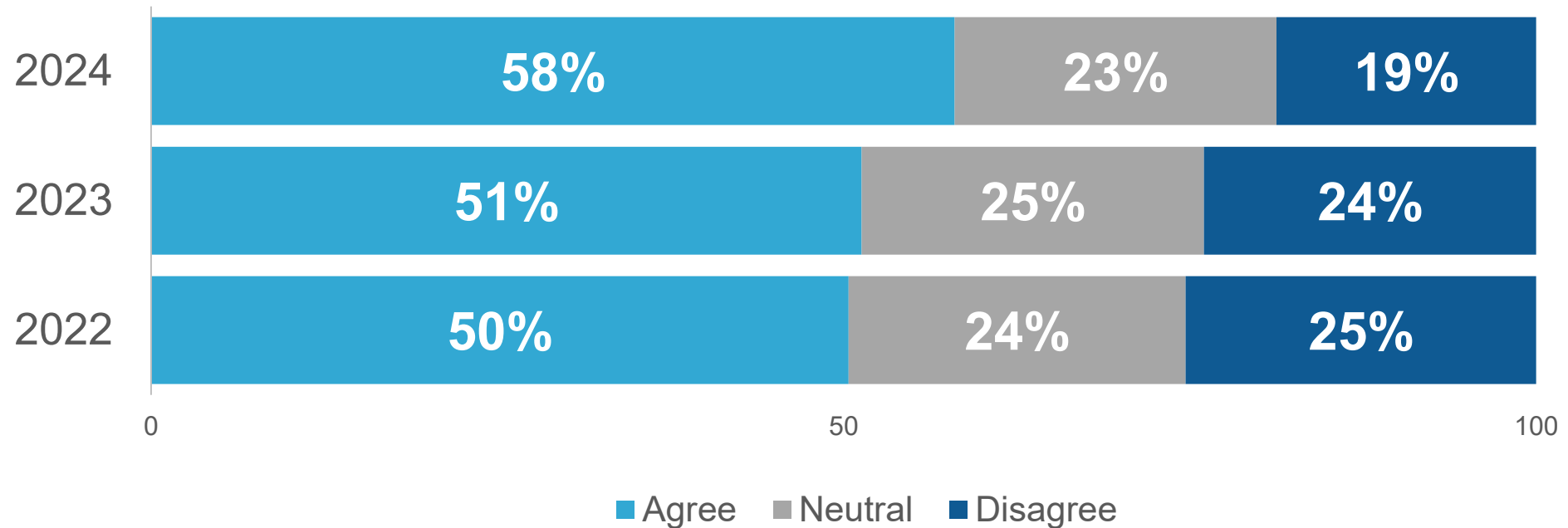
**“Your Residents
Are Your Most
Important
Customers!”**

**– Jack Johnson, Destinations
International**



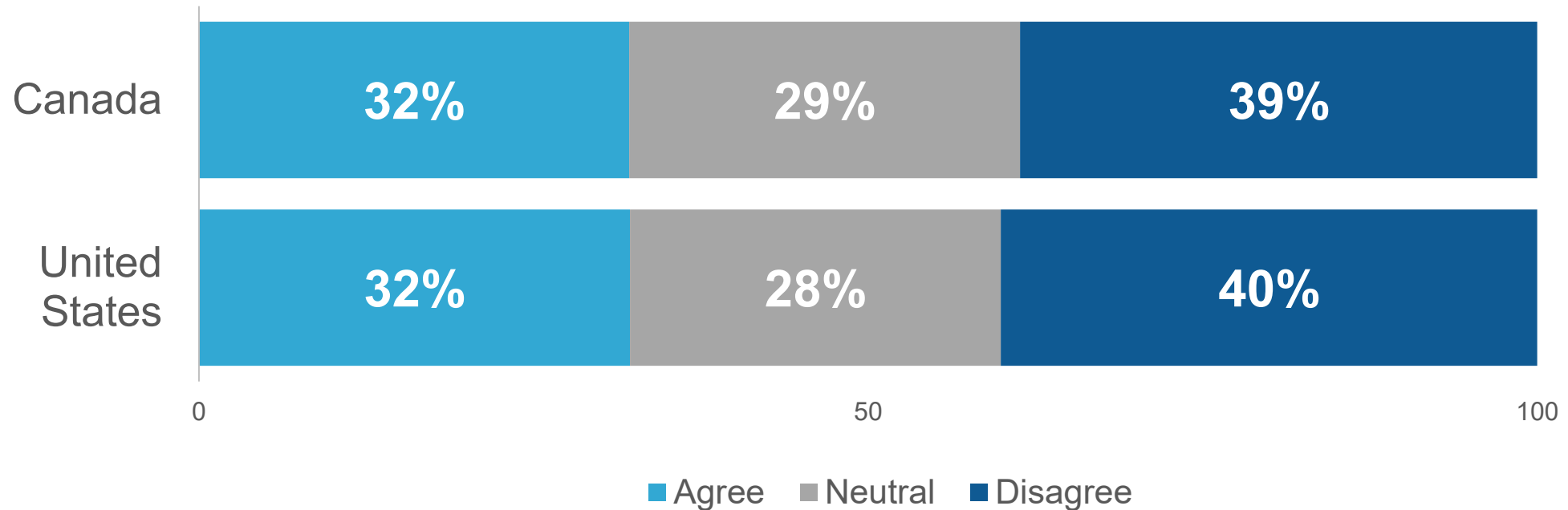
Overall Sentiment About Tourism – US – Shift to Understand

My local area benefits from a strong tourism industry



Tourism Development and Growth - **Ongoing Disconnect!**

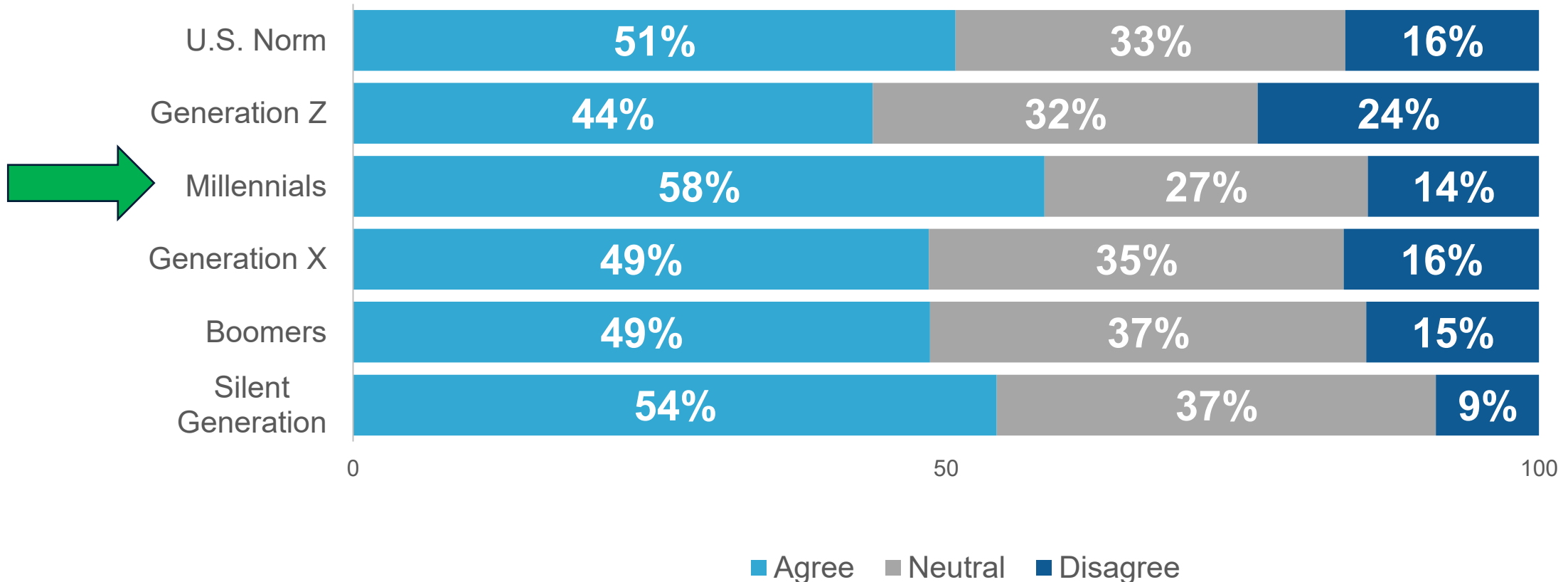
Residents are consulted when major tourism development takes place in this area



Tourism Employment – US

Generational Comparisons

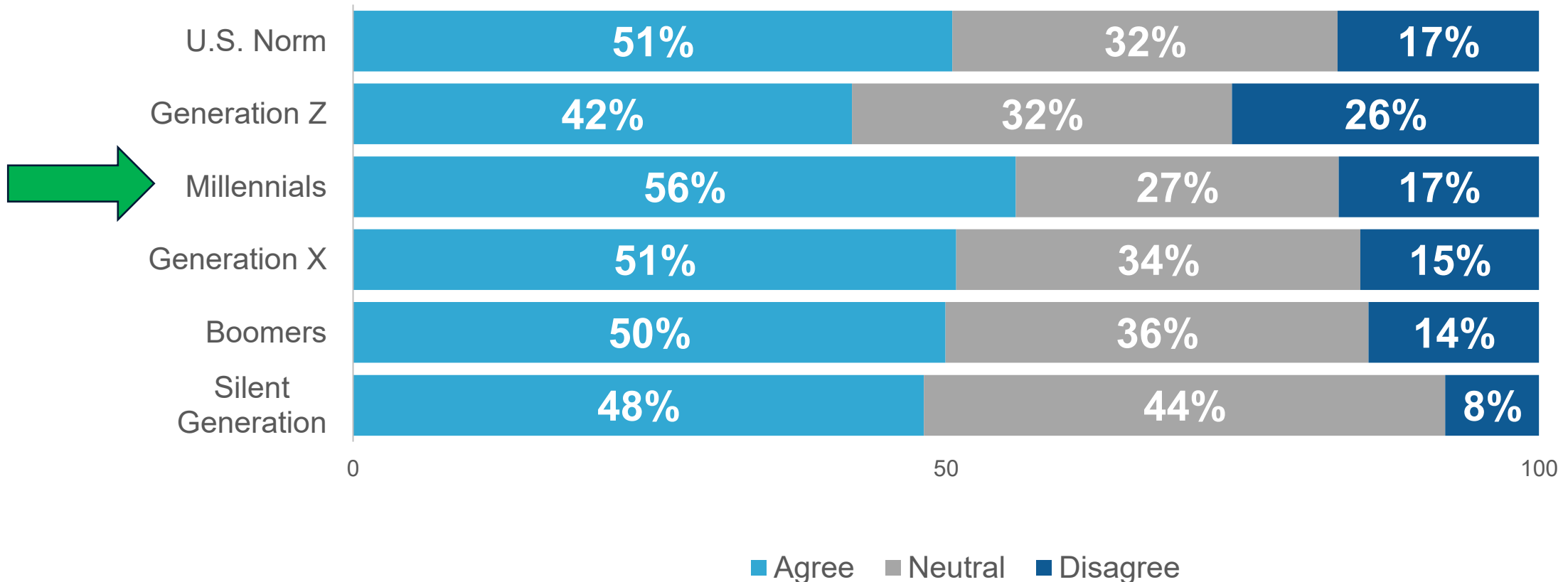
There are jobs in the tourism industry with desirable pay and benefits



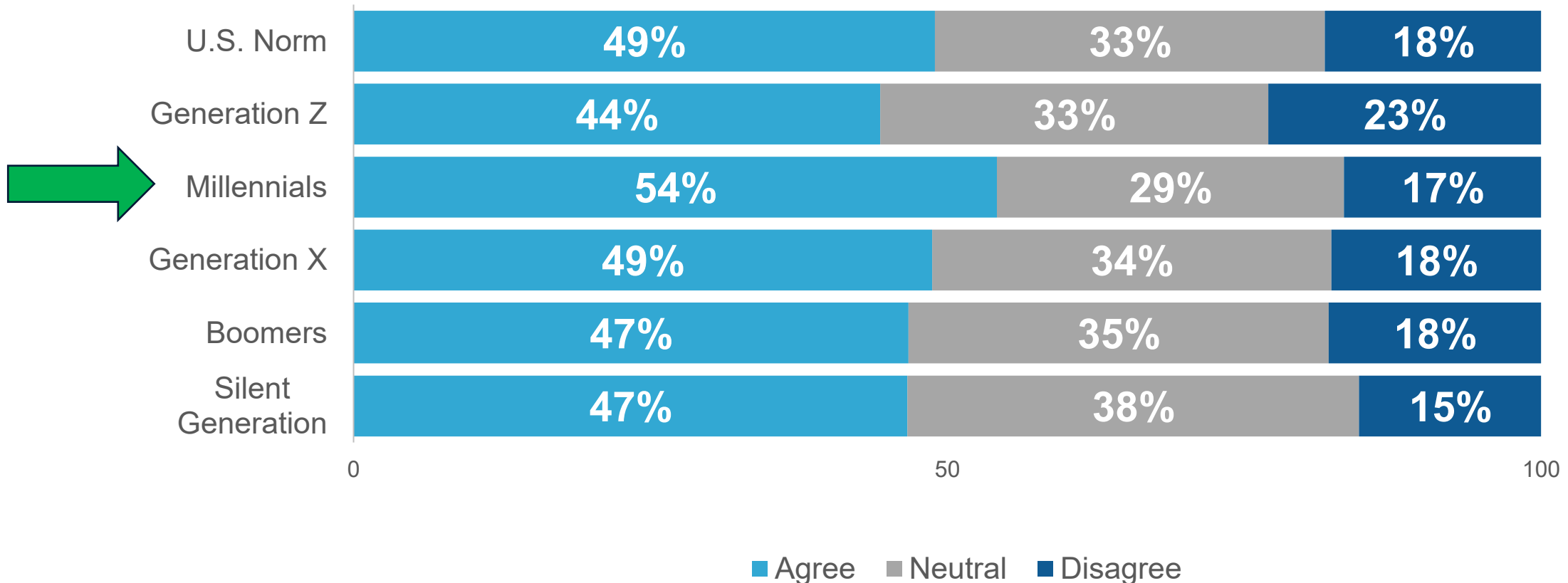
Tourism Employment – US

Generational Comparisons

There are opportunities for career advancement in the tourism industry



Most jobs in the tourism industry are low-paying and seasonal



09

**Resident &
Community
Engagement is
Now Essential for
Every Tourism
Business!**



Because No One Wants This Outcome...

Overtourism

Barcelona's Firing of Its Tourism Chief Reinforces Why Engaging Local Communities Matters

Dawit Habtemariam, Skift

October 19th, 2022 at 1:00 PM EDT

What's Next from Longwoods Res. Sent.:

- **Full Reports Released – Jan.'25 Available via Destinations International**
 - **USA**
 - **Canada**
- **Updated White Paper – Jan/Feb '25**

10

Let's talk about
"Re..."





The First Age Of “Re”

- Immediately Post 9/11
- Feelings of Shock, Fear, Despair, & Uncertainty
- Only Lasted a Few Months



The First Age Of “Re”

- We Gathered Our Loved Ones...
- ...And Got Away!
- Focused On Relax, Relationships, and Restoration, etc...

The Second Age Of “RE”: Post-COVID19



- Lockdowns
- Feelings Like Disconnected/Lost
- Afraid Of Repeat
- Much Longer Impact

**Because We
Wanted To...**



2021-2024



Reunite... Relax... Reconnect... etc...



So messaging responds...



So messaging responds...



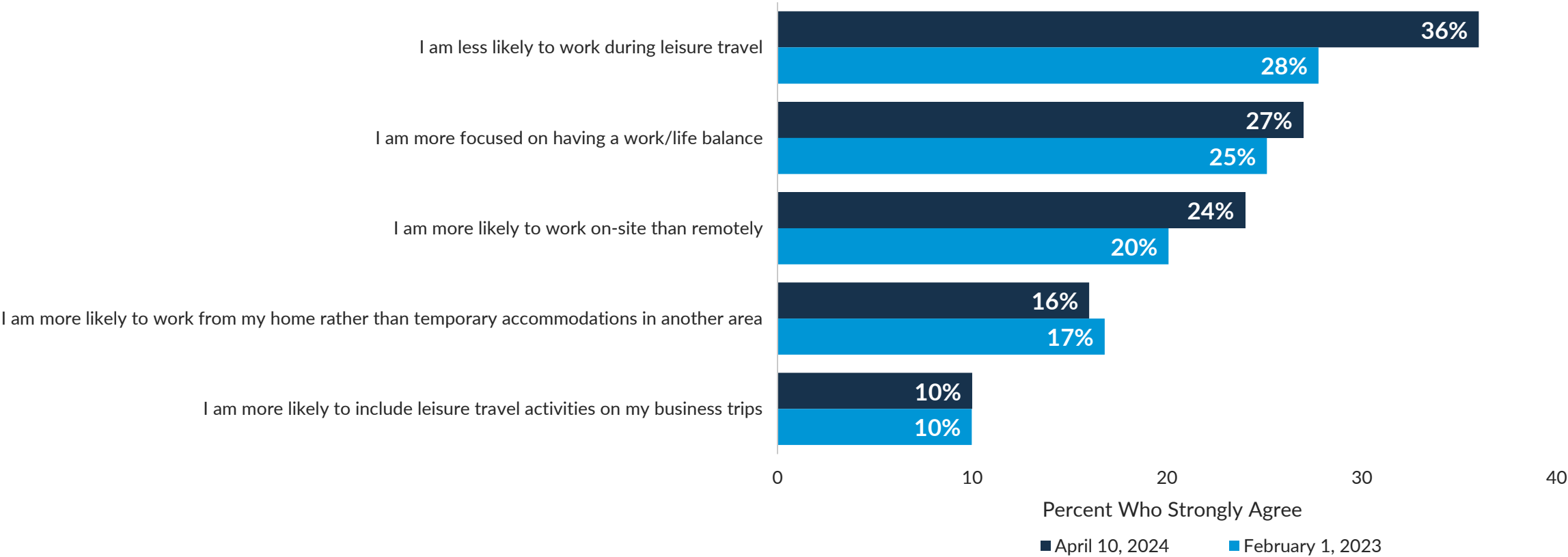
Looking Ahead... What We Want:

Expectation of Balance!

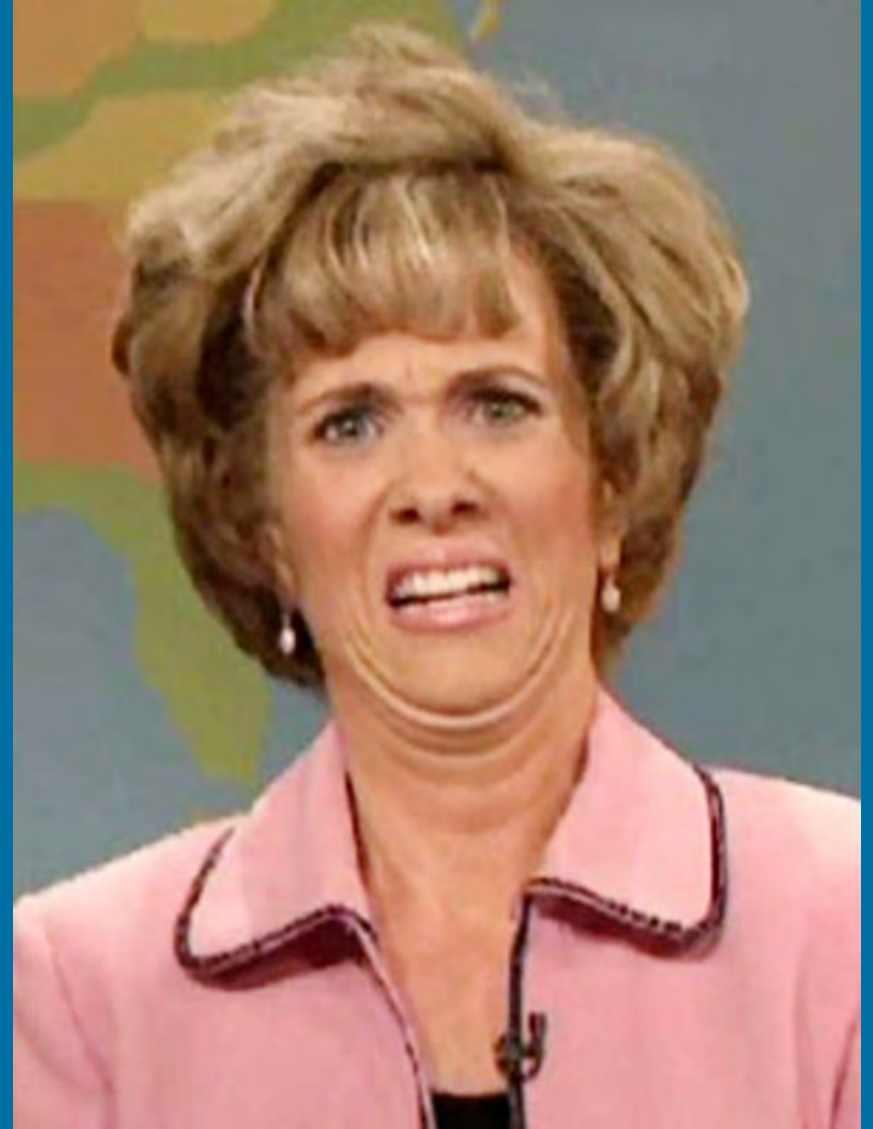


IMPACT ON TRAVEL PLANS

Strongly agree with the following statements regarding your work activities compared to 2020/2021:



**...And can we
talk about the
word “bleisure?!”**



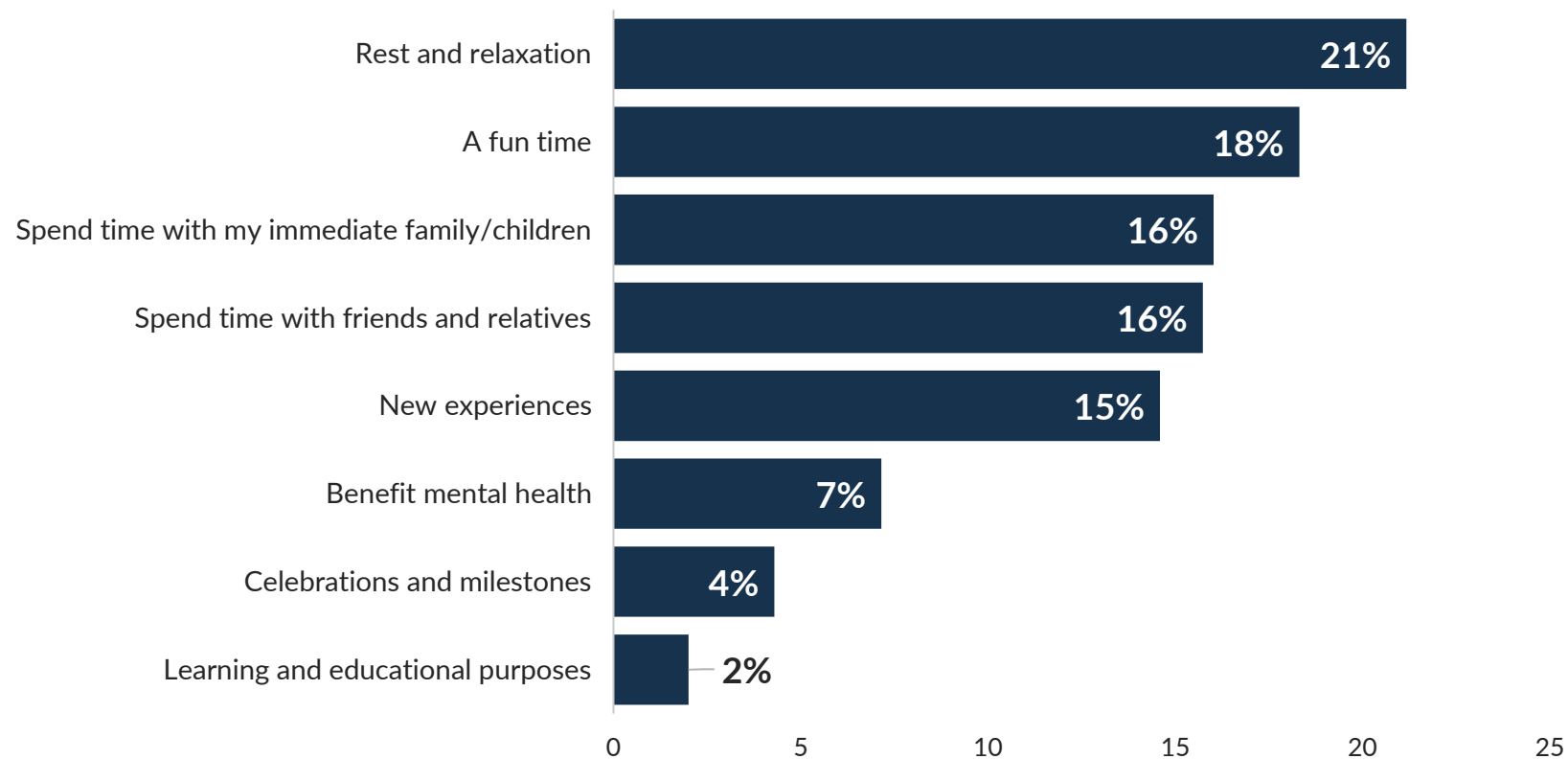
2025

**Travelers Still
Want Some “Re!”**



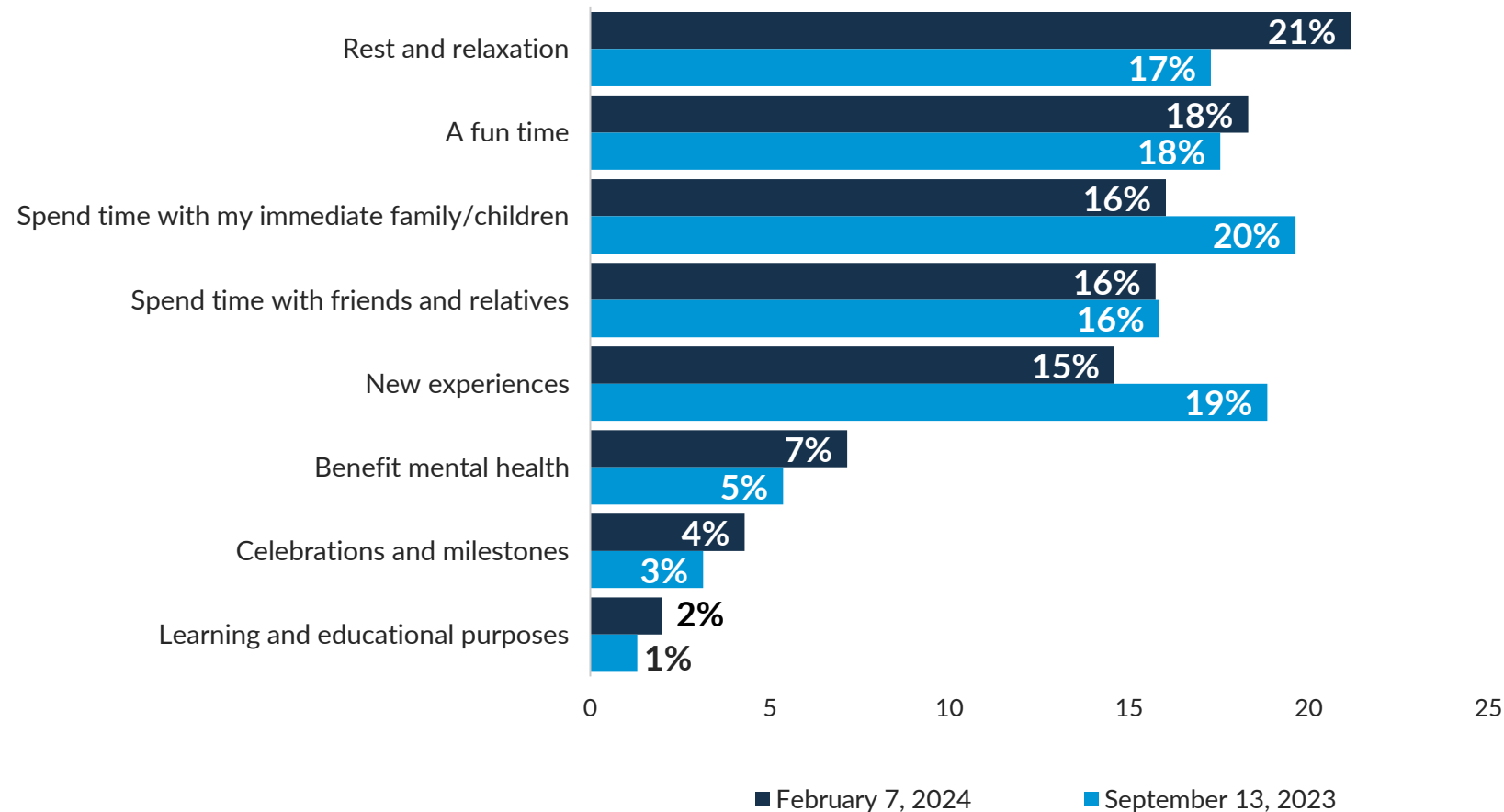
IMPACT ON TRAVEL PLANS

What is your main motivation for leisure travel?



IMPACT ON TRAVEL PLANS

What is your main motivation for leisure travel?



**But Just Add
Some “Me!”**

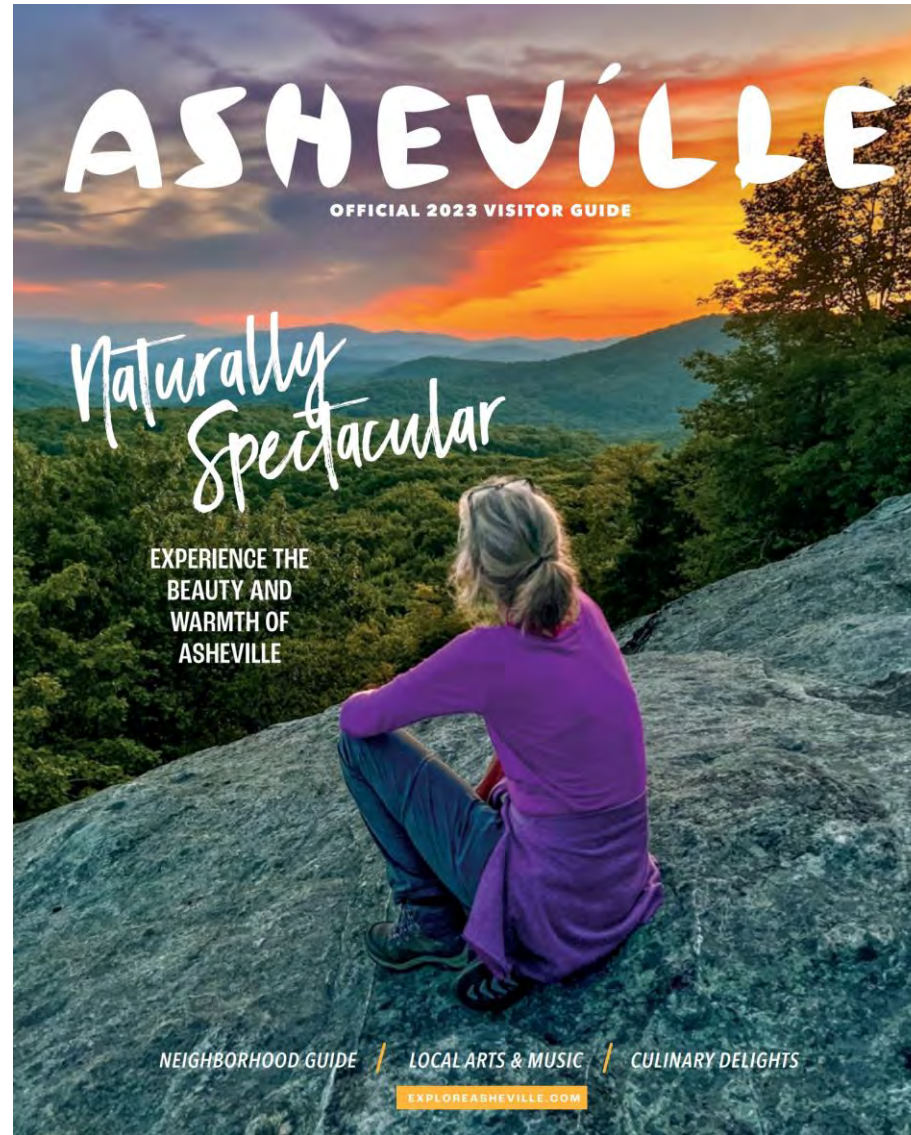
2024-2026:



So messaging responds with some more of this...



But also some of this...



And this...



And this...



Key Learning – Opportunity!

Take this time of “Re...”

- RE-unite
- RE-connect
- RE-kindle
- RE-lax
- RE-set
- RE-juvenate
- RE-invigorate
- RE-imagine
- RE-invent, etc...

And be sure to add time for “ME!”

While the high demand to reconnect with others will still drive a lot of travel decisions, the thirst to find balance within one's self and satisfy more personal & hedonistic-like needs will grow as a key motivator in the coming year...

Speak “Re” & Show “Me!”

Thank You!

Amir Eylon

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