US Travel Rates

Understanding Modern Travel Trends

Department of Cognitive Psychology

AnalyticsIQ
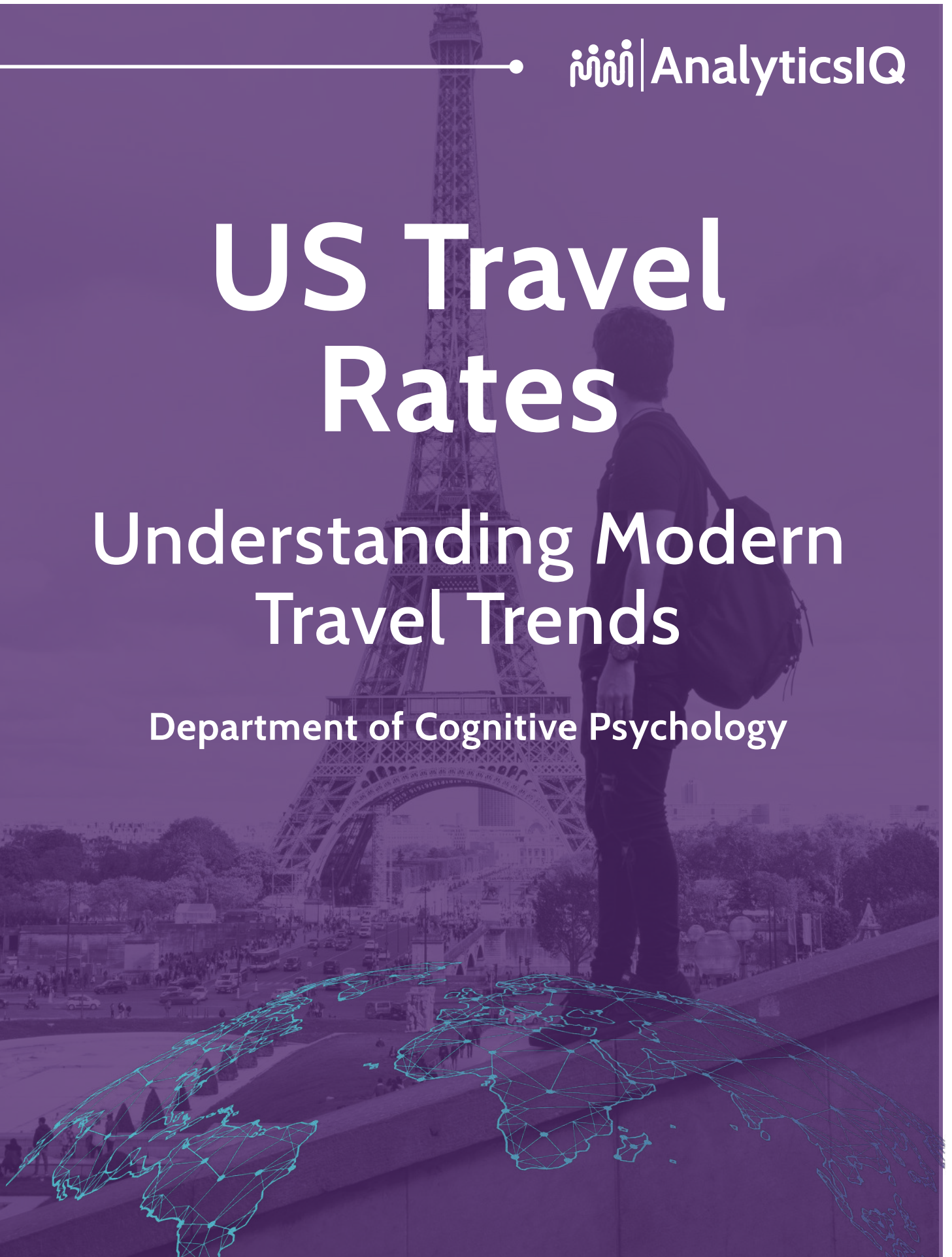
Introduction

• The US travel industry has been in a deep state of adjustment since March 2020 with the arrival of the COVID-19 pandemic, followed by a several year journey of evolving travel restrictions, border closures, and wide-sweeping health and safety protocols.

• By 2022, vaccinations were widely distributed, travel advisories eased, and the travel and tourism industry saw a resurgence in consumers' desire and willingness to travel. Yet along with this increased mobility came newer trends which underscored consumers' need for affordable options and flexible booking policies no matter their destination.

• According to a recent forecast by the US Travel Association[1] 2024 is projected to be a big growth year for international and business travel, respectively returning to 98% and 95% of their pre-pandemic volumes. Conde Nast Traveler acutely outlines the many ways US travelers are adjusting their travel intentions - leaning into sustainable travel options, more personally curated travel experiences, health- and wellness-focused respites, and geo-centric excursions (e.g., astro-travel, eco-diving)[2].

• Given the ongoing travel and tourism industry fluctuations, the Cognitive Sciences research team at AnalyticsIQ conducted a large nationwide survey of US adults about their recent travel habits and preferences[3]. The following data are a comprehensive summary of our findings.

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[1] https://www.ustravel.org/research/travel-forecasts

[2] https://www.cntraveler.com/story/travel-trends-2024

[3] All respondents were presented with an informed consent prior to beginning our survey which outlined the scope of the survey questions they'd be asked and how their data would be used and stored. All data presented in this report are reflective of those respondents who agreed to opt into our survey under the parameters outlined in the informed consent. Our multi-thousand-person sample was representative of the US population based on age, gender and race.

Travel Overview

**Total # of trips in a 12 month period**
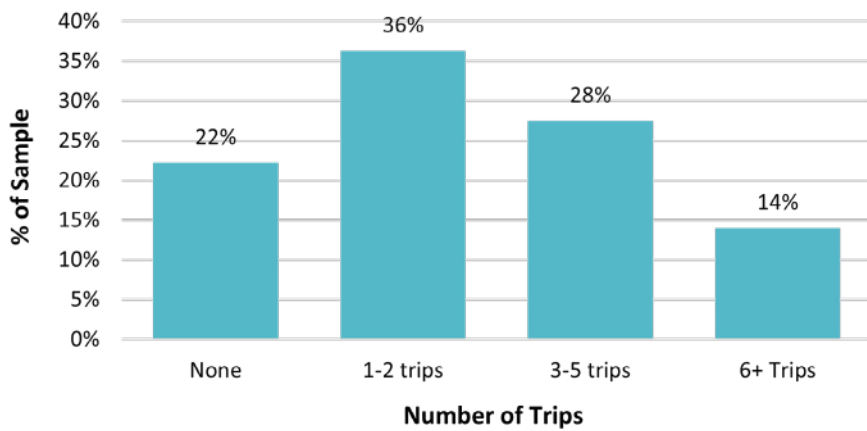
Graph 1a. Survey takers across the US were asked to report the number of times they traveled away from home (for at least one night) within the last 12 months. Although most people reported taking between 1-2 trips (36%) in the last year, almost a quarter of our sample said they hadn't traveled at all (22%). The average trip total reported was 2.9 (*SD*=3.4).

DID YOU KNOW

People who travel score significantly higher in impulsivity, materialism, openness to new experiences, and extraversion characteristics, whereas non-travelers score higher in conscientiousness and agreeableness.

In the last 12 months, most people traveled within the domestic United States (95%), for personal reasons (92%) rather than business, and opted to jet-set with companions (74%) rather than fly solo.

Effects of Age, Gender, and Race on Total # of Trips Taken
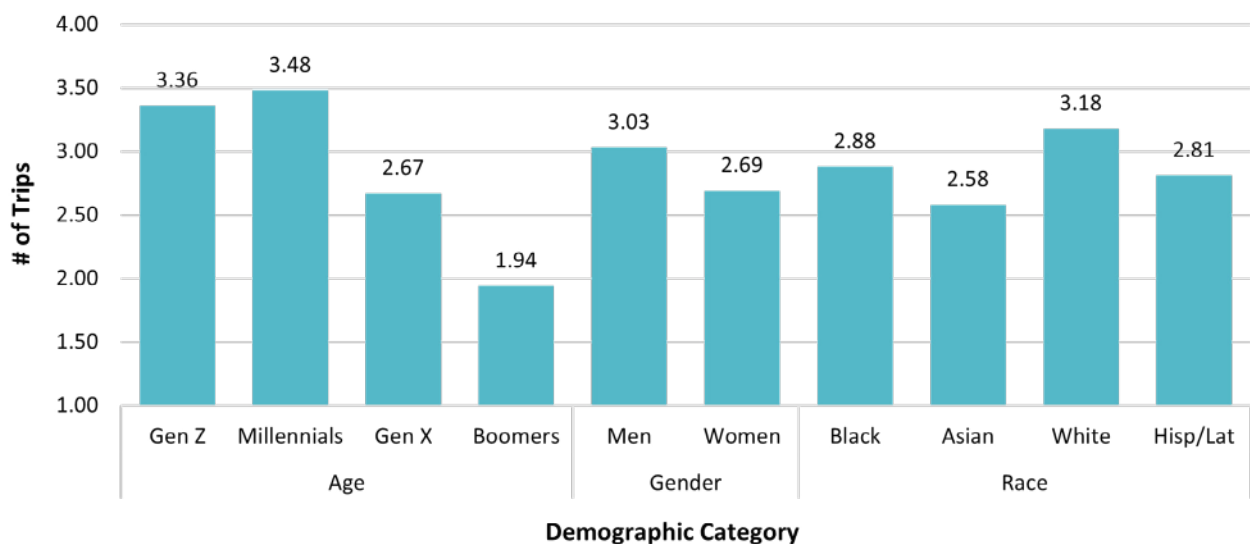
Graph 1b. An Analysis of Variance (ANOVA) was conducted to determine if there were any differences in travel frequency as a function of personal demographic features. Results reveal that there were significant main effects for age ($p<.001$), gender ($p=.01$), and race ($p<.01$). Gen Z and Millennial groups travel significantly more often than Gen X or Boomer groups; men travel more than women; and white folks travel significantly more than any other race group.

Geographic Regions

US Regions Visited

Graph 2a. Survey takers who traveled within the US over the last 12 months, identified where they visited. Just under half our sample said they visited the Southeast (41%), and about a third said they traveled to the Northeast (31%) and Midwest (30%). The Southwest and West Coast (including Hawaii) were visited least often (21% and 20%, respectively).
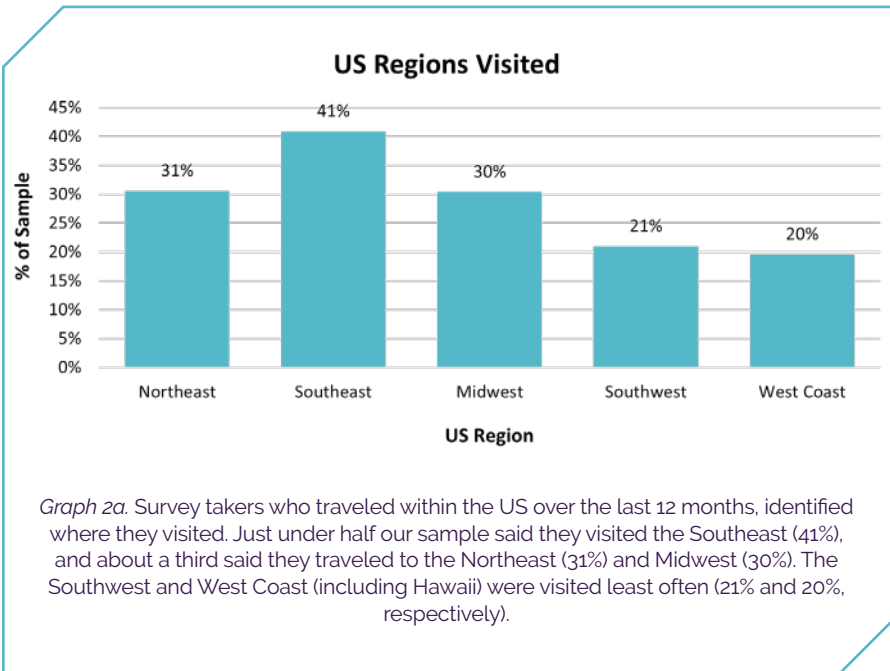
DID YOU KNOW

Canada and Mexico are the most popular international destinations for US travelers (62%), followed by Central America (23%), Western Europe (17%), and South America (15%).

Types of Landscapes

Graph 2b. We also queried survey takers about the types of landscapes they visited during their travels. More than half our sample said they visited large cities (55%) or small towns and suburbs (51%). Roughly a third said they journeyed to coastal areas (36%) or the mountains (32%), whereas around 10% said they traveled to experience the desert or tropics.
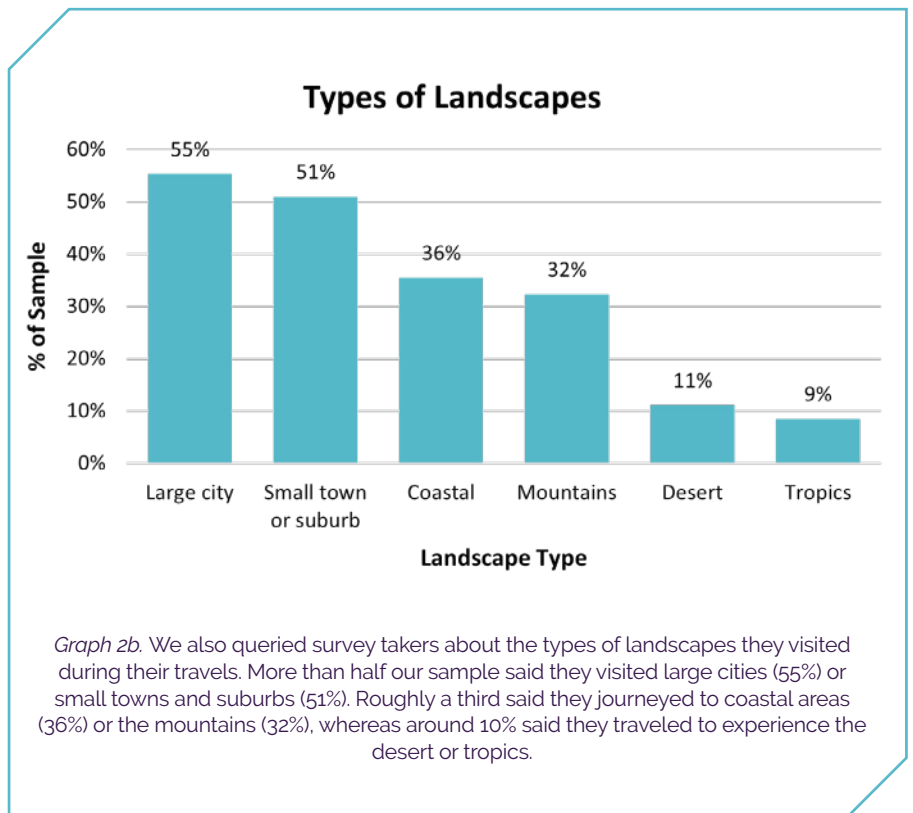
Transportation

Common Forms of Travel Transportation
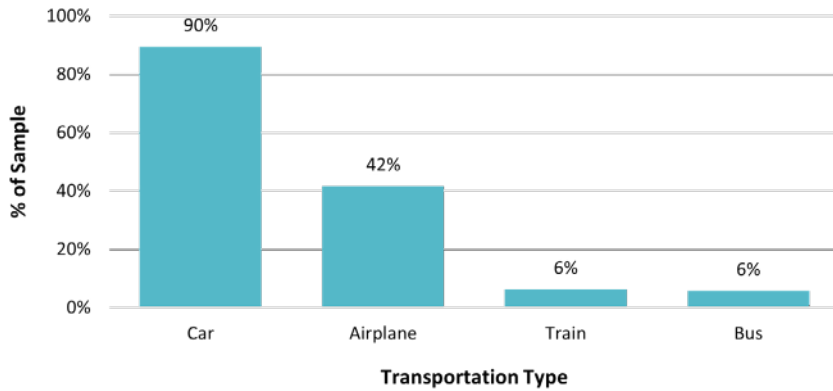
Graph 3a. Survey takers who traveled within the US over the last 12 months, identified where they visited. Just under half our sample said they visited the Southeast (41%), and about a third said they traveled to the Northeast (31%) and Midwest (30%). The Southwest and West Coast (including Hawaii) were visited least often (21% and 20%, respectively).

Preferred Airline

% Preferred ── **% with Airline Credit Card**

Graph 3b For those who choose air travel, we asked folks to identify their preferred airline, and for all airlines selected we then asked if survey takers also had that airline's branded credit card. Overall, Southwest (28%) and Delta (24%) were the most preferred airl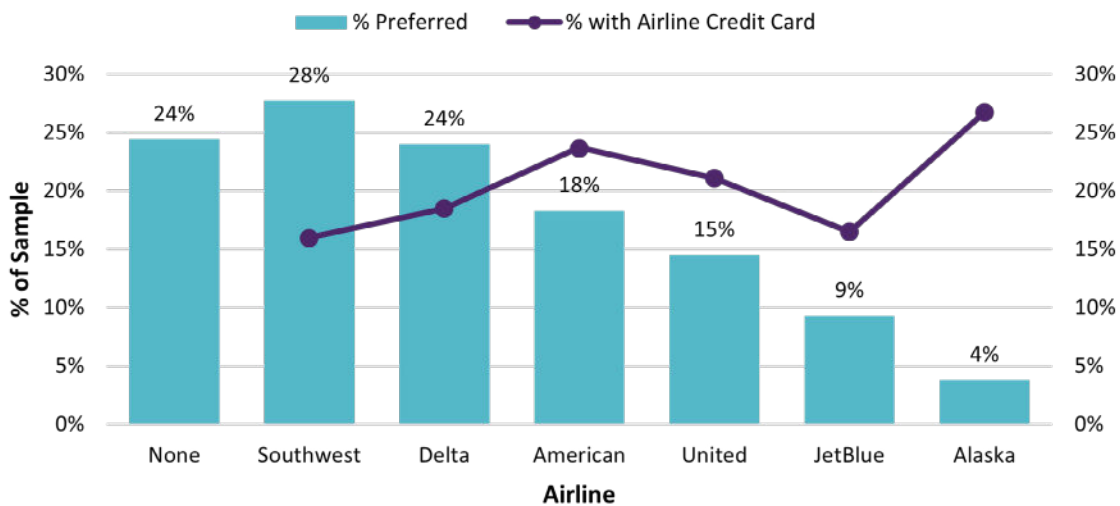ine, followed by American (18%) and United (15%). About a quarter of our survey sample said they didn't have any preferred airline (24%). Alaska Airlines had the highest proportion of travel loyalists with their branded credit card (27%), followed closely behind by American (24%) and United (21%).

Note: Other airlines were included in the survey (e.g., Spirit, Frontier), but sample sizes did not meet our minimum threshold for inclusion here.

33% of all travelers rented a vehicle over the last 12 months, and 96% of those rentals were for cars.

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Accommodations

Preferred Accommodations When Traveling

Legend: ■ Never ■ Infrequently ■ Occasionally □ Often ■ Always

Housing Type	Never	Infrequently	Occasionally	Often	Always
Hotels	19%	8%	20%	33%	21%
P2P Housing (e.g., Airbnb)	60%	12%	16%	10%	3%
Bed & Breakfasts	69%	14%	11%	4%	1%
Hostels	85%	6%	5%	3%	1%

X-axis: % of Sample (0% to 100%)

Graph 4a. Survey takers indicated how often they choose to stay at each of the above accommodation options. Hotels are the most popular choice with 54% of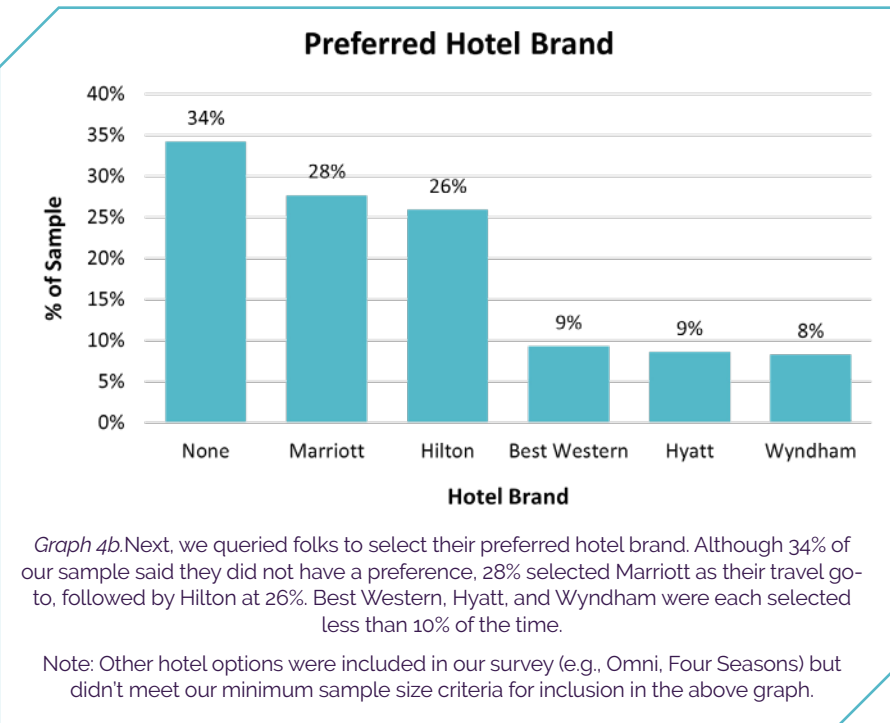 our sample reporting that they often or always choose to stay in hotels when they travel, whereas peer-to-peer (P2P) housing options (like Airbnb or VRBO) are only preferred (often or always) among ~13% of the US population. Hostels are the least popular of all with 89% of our sample saying they never opt for this type of co-housing accommodation.

Note: Other housing options (e.g., campsite, cabin, stay with a friend or family member, cruise ship) were queried but didn't meet our minimum sample size criteria for inclusion in the above graph.

52% of all US travelers prefer to book their hotel accommodations directly through the hotel app or website.

Just over a third (38%) prefer to book through an online booking agency (like Travelocity or Orbitz).

Preferred Hotel Brand

Hotel Brand	% of Sample
None	34%
Marriott	28%
Hilton	26%
Best Western	9%
Hyatt	9%
Wyndham	8%

Graph 4b. Next, we queried folks to select their preferred hotel brand. Although 34% of our sample said they did not have a preference, 28% selected Marriott as their travel go-to, followed by Hilton at 26%. Best Western, Hyatt, and Wyndham were each selected less than 10% of the time.

Note: Other hotel options were included in our survey (e.g., Omni, Four Seasons) but didn't meet our minimum sample size criteria for inclusion in the above graph.

Travel Style

Travel Experiences

■ Never ■ Infrequently ■ Occasionally ■ Often ■ Always

Experience	Never	Infrequently	Occasionally	Often	Always
Wellness	25%	26%	28%	15%	6%
Adventure	28%	25%	27%	14%	6%
Outdoors	14%	17%	31%	26%	11%
Culinary	9%	12%	27%	31%	22%
Family	13%	18%	30%	27%	12%
Cultural	8%	14%	35%	30%	13%

% of Sample

Graph 5a. The activities and experiences we seek out while traveling are the ingredients of precious memories (and social media highlight reels). So which types of activities do most people seek out when traveling away from home? Our study found that the majority of people sought out culinary experiences (e.g., wine tastings) often or always (53%) when traveling, followed by cultural experiences (e.g., museums; 43%), family-friendly activities (e.g., amusement parks; 39%), outdoors activities (e.g., hiking; 37%), wellness options (e.g., massage, yoga; 21%), and finally adventurous excursions (e.g., ziplining; 20%).
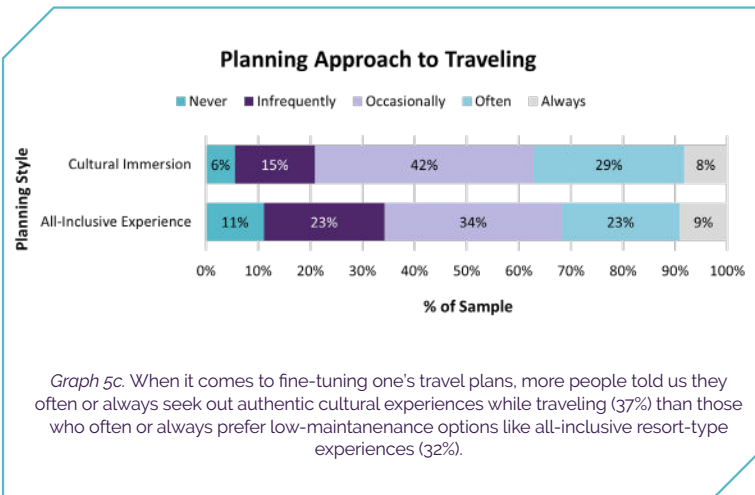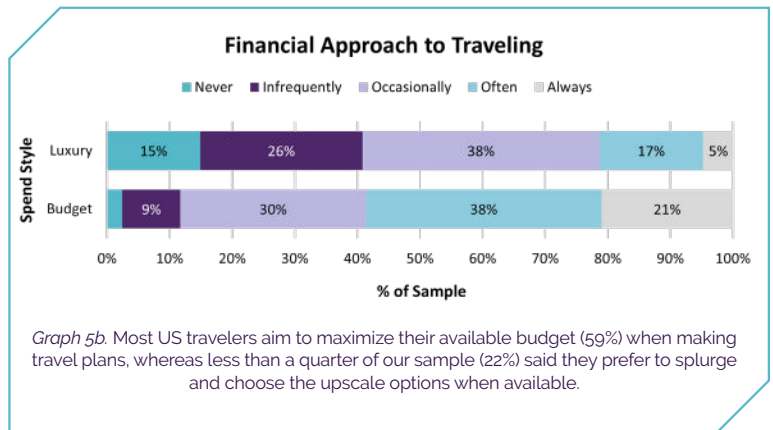
Men tend to seek adventurous and outdoors activities more often than women, and women opt for cultural, culinary, and family experiences more often than men.

Both are relatively equal in their preference for wellness activities.

DID YOU KNOW

61% of US travelers said that earning travel rewards (like airline miles or hotel loyalty points) were somewhat, very, or extremely important to them.

Financial Approach to Traveling

■ Never ■ Infrequently ■ Occasionally ■ Often ■ Always

Spend Style	Never	Infrequently	Occasionally	Often	Always
Luxury	15%	26%	38%	17%	5%
Budget		9%	30%	38%	21%

% of Sample

Graph 5b. Most US travelers aim to maximize their available budget (59%) when making travel plans, whereas less than a quarter of our sample (22%) said they prefer to splurge and choose the upscale options when available.

Planning Approach to Traveling

■ Never ■ Infrequently ■ Occasionally ■ Often ■ Always

Planning Style	Never	Infrequently	Occasionally	Often	Always
Cultural Immersion	6%	15%	42%	29%	8%
All-Inclusive Experience	11%	23%	34%	23%	9%

% of Sample

Graph 5c. When it comes to fine-tuning one's travel plans, more people told us they often or always seek out authentic cultural experiences while traveling (37%) than those who often or always prefer low-maintenance options like all-inclusive resort-type experiences (32%).

Finalizing travel details 4-6 weeks ahead of time is the planning sweetspot for about half of US travelers (46%). Although 31% said they often or always plan their trips at least 6 months ahead of schedule, only 14% said they end up booking at the last minute.

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Summary of Key Findings

• The vast majority of US adults (78%) travel away from home at least once per year.

- Most are traveling within the domestic US (95%), for personal reasons (92%) rather than business, and with companions (74%) rather than alone.
- Demographic and personality characteristics play an important role in identifying who is traveling and how often they jet-set.

• The most popular US regions to visit are the Northeast (31%) and Southeast (41%), whereas Canada and Mexico (62%) are the most popular international destinations.

• Traveling by car (90%) or plane (42%) is preferred, and among air-bound travelers, Southwest (28%) and Delta (24%) were the most preferred airline brands.

• Hotels are the most common housing choice, with 54% of our sample saying they often or always choose hotels when traveling versus just 13% who said they often or always stay at peer-to-peer options (P2P), like Airbnb or VRBO. This is consistent with a recent survey by OnePoll, which found that two-thirds of those queried prefer hotels to home rentals or other P2P options.[4]

• Culinary experiences (53%) are the most frequent activity sought out while traveling, followed by cultural experiences and family-friendly activities, leaving wellness options and adventurous excursions resonating with only ~20% of the population.

• Approximately 60% of US travelers said that maximizing their budget was critical when making travel plans, and a similar proportion said earning travel rewards (like airline miles) was somewhat, very, or extremely important to them.

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[4] https://www.linkedin.com/pulse/why-travelers-prefer-hotels-over-airbnb-2023-blacktravelsummit/
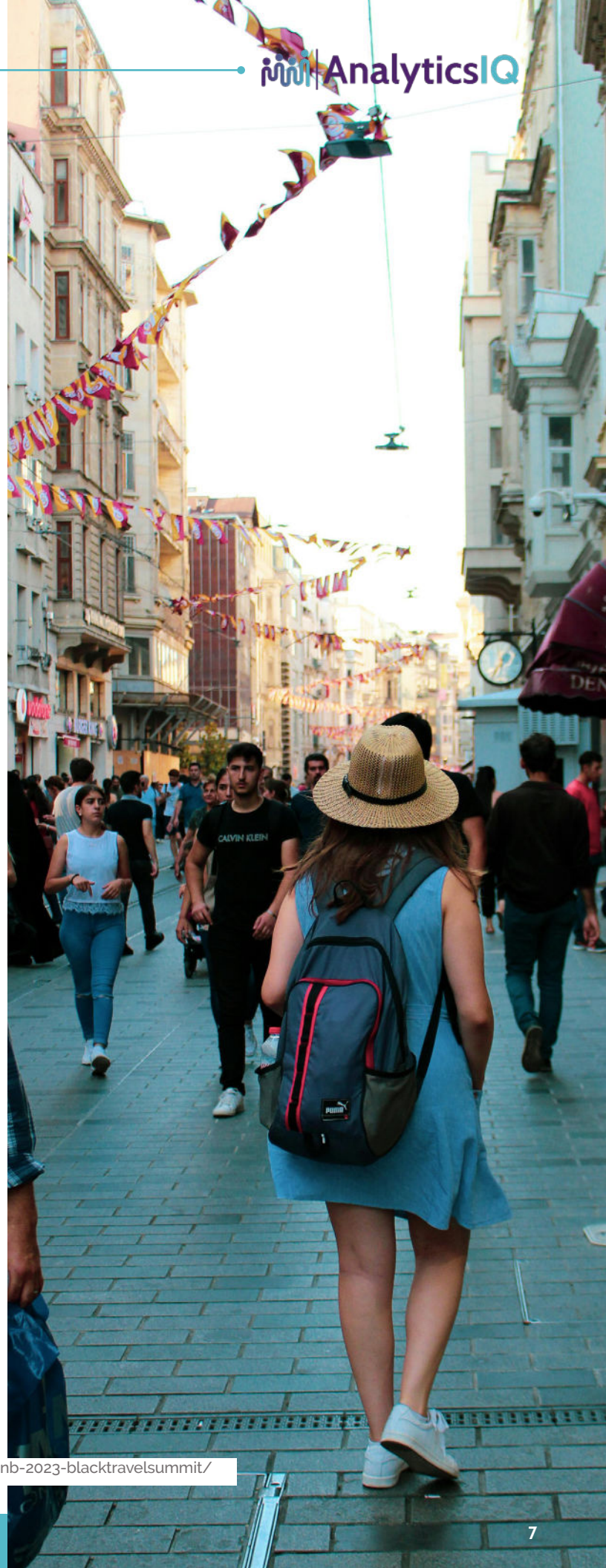
Implications & Further Action

• Although train travel was affirmed by only 6% of our sample, "Luxury Rail" experiences are projected to undergo a revival in 2024, especially among the climate conscious.[5] Future research could explore the changing landscape of train travel more directly by identifying landscapes, desired experiences, and price maximums among curious travelers.

• Even though our sample reported an overall preference for hotel accommodations, other researchers have found that vacation and leisure travelers tend to prefer P2P options whereas hotels are the accommodation go-to for business travel. We did not address this directly in the current research, but replication of this preferential nuance is warranted in the future.

• Trends around experiences and excursions are also undergoing an evolution given the emerging demand for hyper-personalized, eco-conscious, nature-based, and wellness-oriented immersions.[6,7] Future research could address this in greater depth by identifying the specific experiences travelers are seeking and how much they're willing to pay for this level of curation.

• Finally, given the broad popularity of rewards programs, travel companies of all kinds have a ripe opportunity to lean more deeply into this demand in order to solidify one's loyal consumer base.

Take Action

• Curious how our travel research can inform your advertising and marketing strategy? See below for a list of available predictive digital datapoints.

• Reach out to **sales@analyticsiq.com** for more detailed information on pricing or about partnering to conduct custom travel research of your own.

Table 1. Digital Datapoints

Travel Trends	Geographic Regions	Transportation	Accommodations	Travel Style
Business Travelers	Coastal Destination	Cruise Lovers	Hotels Preferred	Future Travel Spend Amount
Domestic Travelers	Desert Destination	Car Renters	P2P Housing (e.g., Airbnb) Preferred	All Inclusive Travel Style
Future Travel Spend Amount	Large City Destination	Travel by Car	Bed & Breakfasts Preferred	Budget Spend Style
Spontaneous Travelers	Mountain Destination	Travel by Plane	Hostels Preferred	Adventure Experiences
Travel Fan	Small Town Destination		Book via online booking agency (e.g., Orbitz)	Culinary Experiences
Travel Credit Card Holders	Midwest US Destination		Book direct through hotel website or app	Cultural Experiences
International Travelers	Northeast US Destination			Family Experiences
	Southeast US Destination			Outdoors Experiences
	Southwest US Destination			Wellness Experiences
	West Coast US Destination			Loyalty and Rewards Lovers
				Luxury Spend Style

Note: Accommodations datapoints are only available as custom requests. Reach out to **sales@analyticsiq.com** for information on pricing.

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[5] https://www.cntraveler.com/story/travel-trends-2024

[6] Young, Cheri & Corsun, David & Xie, Karen. (2017). Travelers' preferences for peer-to-peer (P2P) accommodations and hotels. International Journal of Culture Tourism and Hospitality Research. 11. 10.1108/IJCTHR-09-2016-0093.

[7] https://irei.com/publications/article/airbnb-vs-hotel-industry/

About the Author

Dr. Sarah Cavrak

Sarah Cavrak, PhD is a Psychologist, and the Senior Director of the Cognitive Sciences Department at AnalyticsIQ, Inc. She has spent 20 years studying psychological underpinnings of human behavior, and is primarily interested in understanding the intersection between motivational dynamics and decision outcomes. **Follow her on LinkedIn**.