

A person with reddish-brown hair, wearing a dark blue jacket and a plaid shirt, is sitting on a rocky mountain peak. They are holding a smartphone in their right hand, taking a photo of a sunset over a vast mountain range. The sun is a small red orb on the horizon, and the sky is a mix of orange and yellow. The mountains are covered in green trees and rocky terrain. The overall scene is a beautiful landscape view.

A Profile of Western U.S. Travelers

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Research Overview

Research Overview

This report presents the findings into Western U.S. travelers' demographics, travel sentiment and behaviors, as well as media consumption habits, with comparison to total U.S. travelers to extract key differentiators that make these Western U.S. travelers stand out and empower destinations in the Western U.S. to better understand how they can reach these travelers.

The goal of this report is to provide travel brands with a comprehensive profile of the Western U.S. traveler coming out of 2024, with information including:

- Financial situation and outlook
- Travel interests and motivators
- Recent travel behaviors, including their most recent overnight trip details
- Top destinations of interest
- The travel brands used most
- Most preferred channels for destination marketing
- Social media usage



Research Methodology

This research is part of Future Partners' ongoing *The State of the American Traveler* study. The survey for this study is distributed monthly to a demographically representative sample of 4,000+ adult American travelers across the four U.S. regions. Travelers are defined as adults 18 years or older who have taken at least one trip 50 miles or more from home in the past 12 months.

Data included in this study was collected each month throughout the calendar year of 2024. In total, 49,233 completed surveys were collected, indicating that the results presented here have a confidence interval of +/- 1.6%. The subsample of Western U.S. travelers was n= 21,470.



Key Terms in This Report

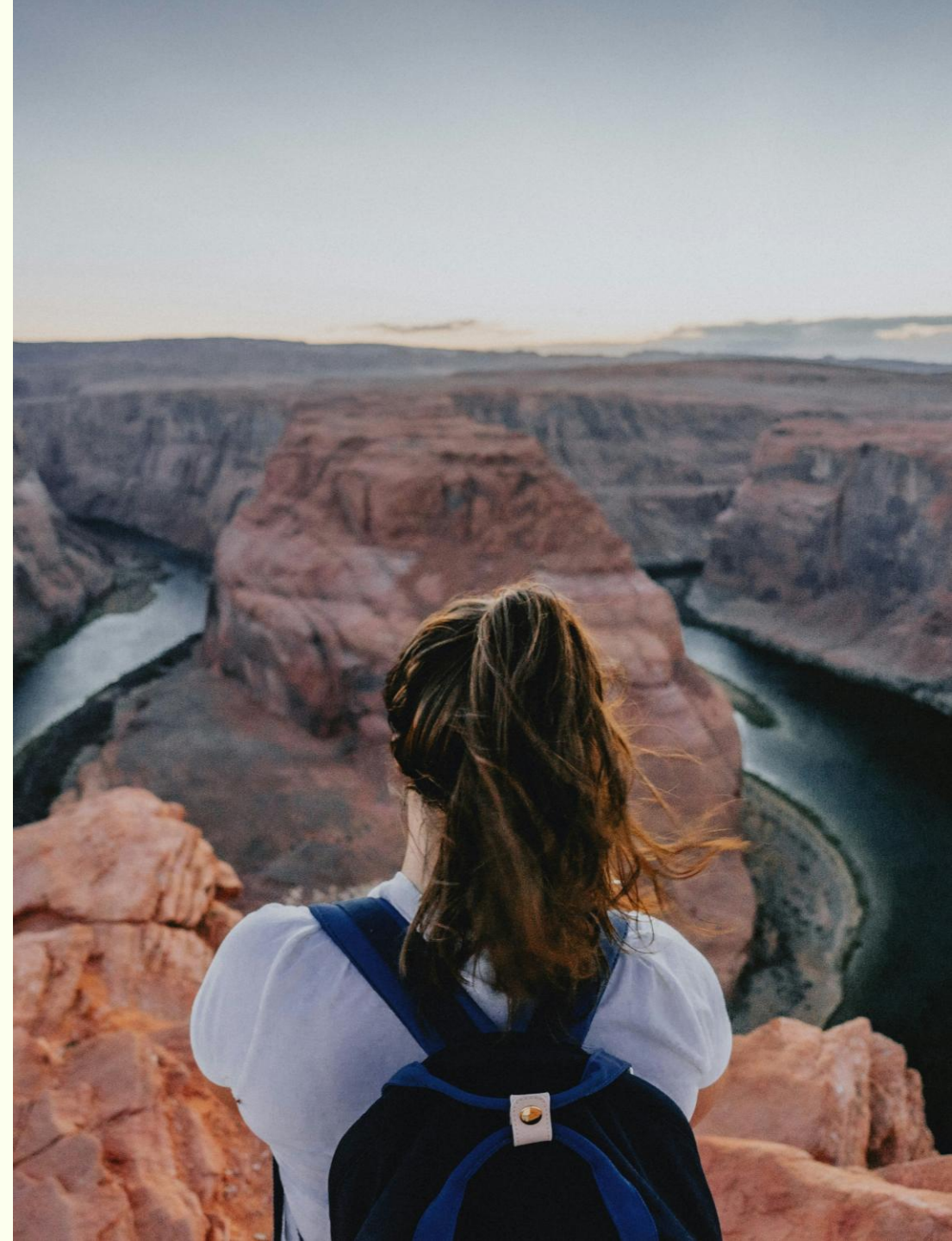
Throughout this report, the following segments are referenced. In addition to the key Western U.S. traveler segment, data on the total U.S. traveler segment are included to provide further context and to help highlight who the Western U.S. travelers are.

Western U.S. Travelers:

This segment is defined as travelers who have visited or traveled within the state(s) of Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Texas, Utah, Washington, or Wyoming in the past 12 months.

Non-Luxury Travelers:

This segment is defined as travelers who are adults 18 years or older and have taken at least one trip 50 miles or more from home in the past 12 months.



Executive Summary

Western U.S. travelers' positive financial outlook is reflected in their strong leisure travel spending intent for the coming year

- Nearly four in ten (38.7%) Western U.S. travelers said they are better off financially compared to a year ago, significantly higher than the 31.8 percent of total U.S. travelers who said the same. Fewer than one in four (22.7%) Western U.S. travelers said they are worse off, notably lower than total U.S. travelers (28.4%). Their financial outlook for the coming year is even more positive. At 52.7 percent, more than half of Western U.S. travelers expect to be better off financially in the next year, outpacing total U.S. travelers by +4.4 percentage points.
- At a healthy +4.2 percentage points above total U.S. travelers, one-third (33.1%) of Western U.S. travelers anticipate traveling more in the next year compared to the previous year. Only 14.1 percent expect to travel less, slightly below the 17.7 percent reported by total U.S. travelers. Leisure travel spend expectations among Western U.S. travelers mirrors their travel volume expectations, with over one in three (36.2%) saying they will spend more on leisure travel in the next year compared to the previous year. Just 15.5 percent said they will spend less on leisure travel.
- Near-term prioritization of leisure travel spending is significantly higher among Western U.S. travelers. When asked to consider only the next three months, leisure travel was a much higher budget priority among Western U.S. travelers (67.0%) compared to total U.S. travelers (57.7%).
- Western U.S. travelers' average annual leisure travel budgets is +28.3 percent larger than total U.S. travelers. They reported a significantly higher maximum expected budget for leisure travel in the next year (\$6,454) versus the still high albeit more modest average reported by total U.S. travelers (\$5,030). In fact, one in four (24.8%) Western U.S. travelers expect to spend \$10,000 or more on leisure travel in the next year.

They lean more heavily into leisure and international travel than the average American traveler.

- Western U.S. travelers were significantly more likely to have traveled for leisure than to visit friends/relatives. When asked about their most recent overnight trip, the largest share of Western U.S. travelers said this trip was for leisure (47.1%), outpacing total U.S. travelers (44.7%). Fewer Western U.S. travelers reported that this most recent overnight trip was to visit friends or relatives (35.6% vs. 40.4%).
- Competition from international markets is something to bear in mind when targeting Western U.S. travelers. Four in ten (40.5%) Western U.S. travelers have traveled outside of the U.S. in the last year, significantly outpacing total U.S. travelers (29.5%). Furthermore, nearly half (48.1%) say they are likely or very likely to travel internationally in the next year. This is significantly higher than the share of total U.S. travelers (36.2%) who say the same.
- Among Western U.S. travelers who have stayed in paid lodging in the past year, over two-thirds (68.6%) said they have stayed in a full-service, 3- or 4-star hotel or resort, the most commonly used type of lodging reported. Generally, their paid lodging usage mirrors that of total U.S. travelers, though Western U.S. travelers are notably more likely to have stayed in a luxury or 5-star hotel or resort (27.9% vs. 21.0%) in the past year.
- Western U.S. travelers are more likely to have traveled for a sporting event or a special event in the past year. Three-fourths (74.2%) of Western U.S. travelers who took a trip specifically to attend a sporting event said they traveled for professional sports, outpacing total U.S. travelers (69.1%) by +5.1 percentage points. Among those who traveled to attend a special event in the past year, more than half (51.9%) said they went for a music concert, followed distantly by three in ten (29.4%) who traveled for a professional sporting event, and one in four (25.8%) who reported traveling for a music festival.

Destinations that are closer to home are more likely to be top of mind – for both domestic and international travel.

- While New York (18.7%) is the top-mentioned desired domestic destination among Western U.S. travelers, they are particularly more likely than total U.S. travelers to mention Las Vegas (17.8% vs. 12.5%), as well as other Western destinations such as California (11.4% vs. 9.0%), Los Angeles (8.8% vs. 5.7%), Hawaii (7.6% vs. 5.6%), and San Diego (5.6% vs. 3.3%). Conversely, while Florida is the third-most mentioned (12.5%) among Western U.S. travelers, this lags behind the 14.6 percent of total U.S. who also wrote in Florida.
- Aside from Japan, European and North American countries are the top-mentioned desired international destinations for Western U.S. travelers. Nearby Mexico (13.4%) and Canada (13.1%) ranked below Italy (16.0%) to round out the top 3 international desired destinations for Western U.S. travelers, while for total U.S. travelers those Mexico (12.4%) and Canada (11.9%) fell behind both Italy (16.3%) and the United Kingdom (12.8%).

Hilton, Marriott top their hotel brands used, while American, Southwest are their top airlines.

- Over one-third of Western U.S. travelers reported using a Hilton (36.9%) or Marriott (33.0%) hotel brand in the past 12 months, with their Hilton brand hotel usage notably outpacing that of total U.S. travelers by +5.0 percentage points. Generally, hotel brand usage was higher among Western U.S. travelers compared to total U.S. travelers. Given their strong usage of Hilton and Marriott hotel brands in the last year, unsurprisingly, Western U.S. travelers are also significantly more likely to say that they currently use the Hilton Honors (41.8%) or Marriott Bonvoy (32.6%) rewards programs, outpacing total U.S. travelers by +6.7 and +6.6 percentage points, respectively.
- Over four in ten (44.3%) Western U.S. travelers said they have flown with American Airlines in the past year, followed by 38.6 percent who have flown with Southwest Airlines, and just over a third who have used Delta Airlines (36.0%) or United (34.3%) in that period. Western U.S. travelers were significantly more likely to have flown with Alaska Airlines (13.8% vs. 9.0%), Air Canada (4.8% vs. 3.5%), or Hawaiian Airlines (4.6% vs. 3.0%) compared to total U.S. travelers. Roughly one in three Western U.S. travelers said they currently use American Advantage (34.5%), Delta SkyMiles (34.1%), and Southwest Rapid Rewards (32.1%). Notably, while Southwest outranks Delta in airline usage in the past year, these travelers are slightly more likely to use Delta's rewards program than Southwest's. Overall, Western U.S. travelers are more likely to use any airline rewards program, with only one in five (21.8%) saying they are not currently using any, compared to over one in three (37.0%) total U.S. travelers).

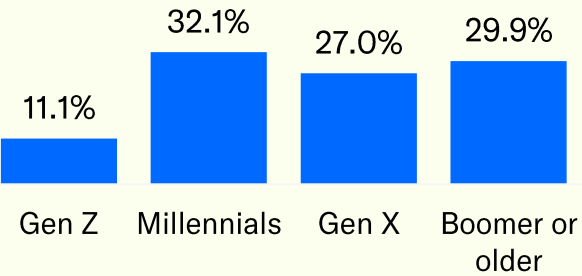
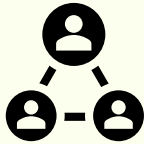
Digital channels are king when it comes to marketing to Western U.S. travelers.

- Online search and email are the top marketing channels for Western U.S. travelers, but social media is also an integral part of their media mix. Western U.S. travelers are most receptive to learning about new destinations through online search (38.0%), followed closely by email (37.1%) Three in ten (30.5%) reported being open to destination marketing on Facebook (30.5%), while about one in four said online content (27.7%) or Instagram (26.0%) were the best places to reach them with messaging. Compared to total U.S. travelers, they are much more likely to be receptive to marketing on Instagram in particular (+5.8 percentage points).
- More than four in ten Western U.S. travelers have used online video to plan travel in the past year. Additionally, influencers are still a travel planning resource for 24.9 percent.
- More than half of Western U.S. travelers said social media helped them with trip planning in the past year. The majority (56.1%) of Western U.S. travelers have used social media to plan travel in the past year, with YouTube being the most-used platform (32.5%), followed by Facebook (30.8%) and Instagram (29.0%).
- Digital resources, namely destination websites and visitor guides, are the top official DMO resources used by Western U.S. travelers in the past year. More than one in four (27.7%) Western U.S. travelers said they used an official destination website, followed by one in five (19.9%) who reported using a digital official visitor guide.

A Snapshot of Western U.S. Travelers

Demographic Snapshot

Generations

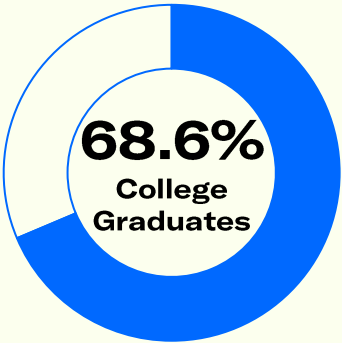


Average Age

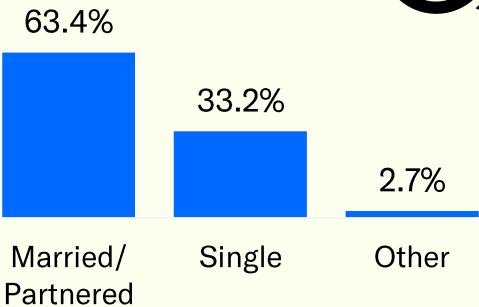
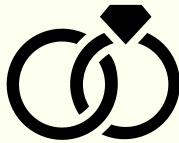


48.2
Years Old

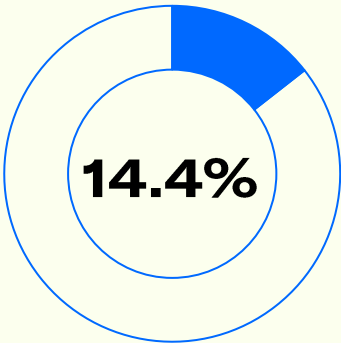
Education



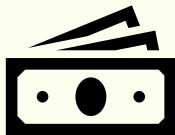
Marital Status



Travelers with Disabilities

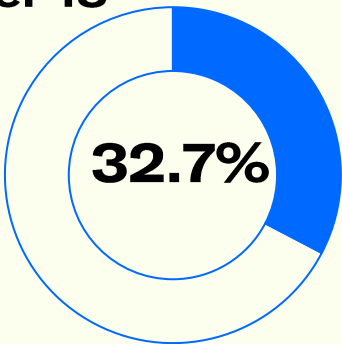


Household Income

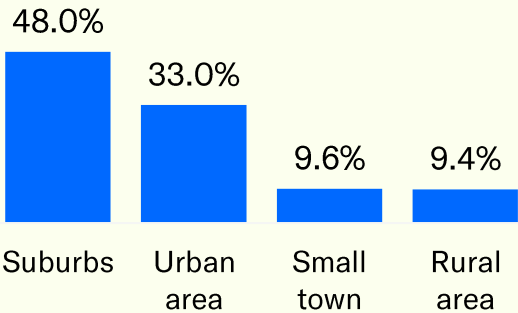


\$118,020

Parents of Children Under 18



Community Type

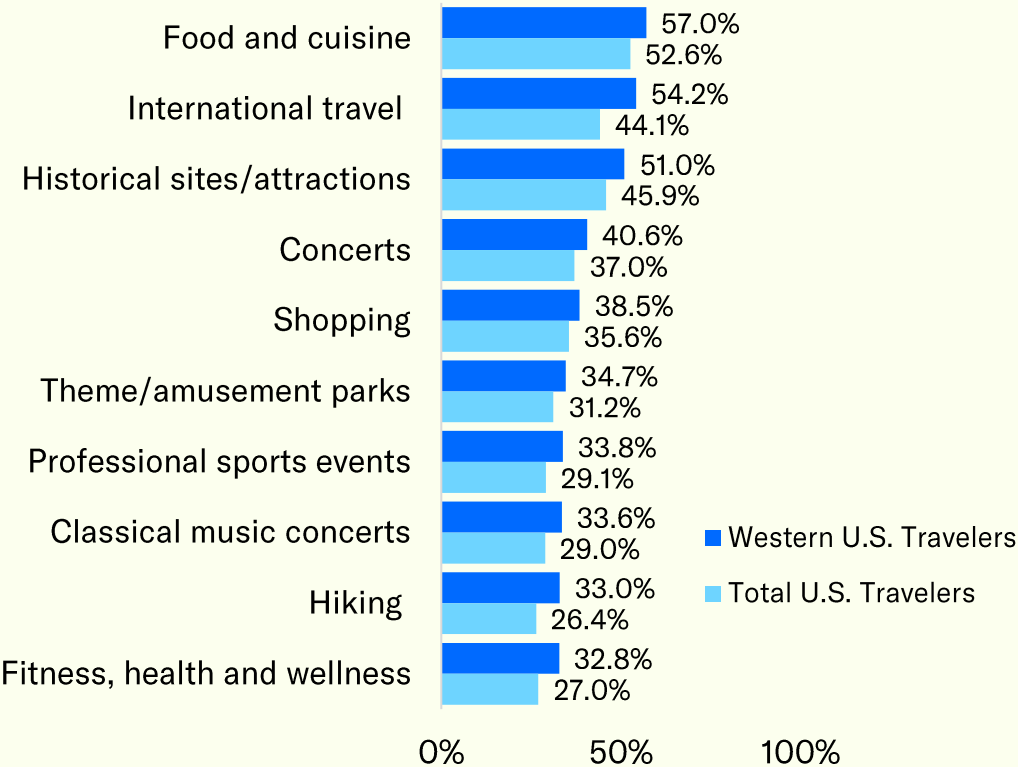


Cultural experiences, centering around food and history, are the top interests among Western U.S. travelers.

More than half of Western U.S. travelers are interested in food and cuisine (57.0%), international travel (54.2%), and visiting historical sites/attractions (51.0%), with international travel in particular outpacing total U.S. travelers' interest levels (+10.1 percentage points).

Top 10 Hobbies & Interests

% Extremely high or High interest



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Food and cuisine	64.2%	61.7%	65.2%	67.3%	64.3%
International travel	62.2%	59.6%	62.7%	62.7%	61.1%
Historical sites/attractions	56.3%	56.1%	55.1%	63.4%	56.6%
Concerts	47.5%	48.8%	50.6%	54.0%	48.8%
Shopping	46.6%	50.0%	52.9%	57.6%	48.0%
Theme/amusement parks	40.9%	45.7%	47.4%	55.3%	42.6%
Professional sports events	42.5%	43.0%	41.5%	45.3%	41.1%
Classical music concerts	41.5%	44.8%	44.4%	47.8%	43.5%
Hiking	35.1%	49.2%	37.4%	48.8%	39.6%
Fitness, health and wellness	39.5%	45.6%	46.5%	52.6%	42.1%
Base	7,344	1,784	3,185	2,017	5,948

Segment is significantly higher

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each. Base: Western U.S. visitors (21,470 completed surveys).

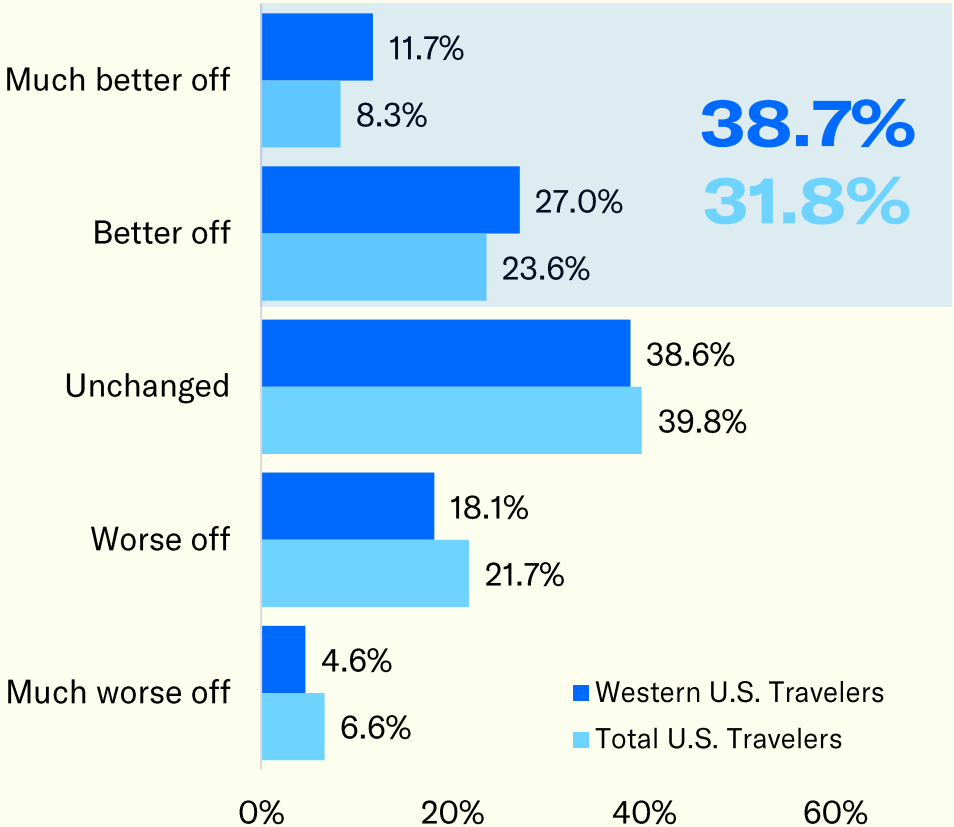
Financial Outlook & Travel Intent

Western U.S. travelers are more likely to feel they are in better shape financially compared to a year ago.

Nearly four in ten (38.7%) Western U.S. travelers said they are better off financially compared to a year ago, significantly higher than the 31.8 percent of total U.S. travelers who said the same. Fewer than one in four (22.7%) Western U.S. travelers said they are worse off, notably lower than total U.S. travelers (28.4%).

Current Household Financial Status

Compared to the last 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Top 2 Box	48.9%	54.2%	53.9%	60.8%	49.0%
Much better off	17.1%	22.2%	20.0%	26.7%	18.1%
Better off	31.7%	32.0%	33.9%	34.1%	30.9%
Unchanged	33.8%	28.5%	31.7%	26.8%	33.2%
Worse off	14.3%	13.4%	11.9%	10.0%	14.2%
Much worse off	3.1%	3.9%	2.4%	2.5%	3.6%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

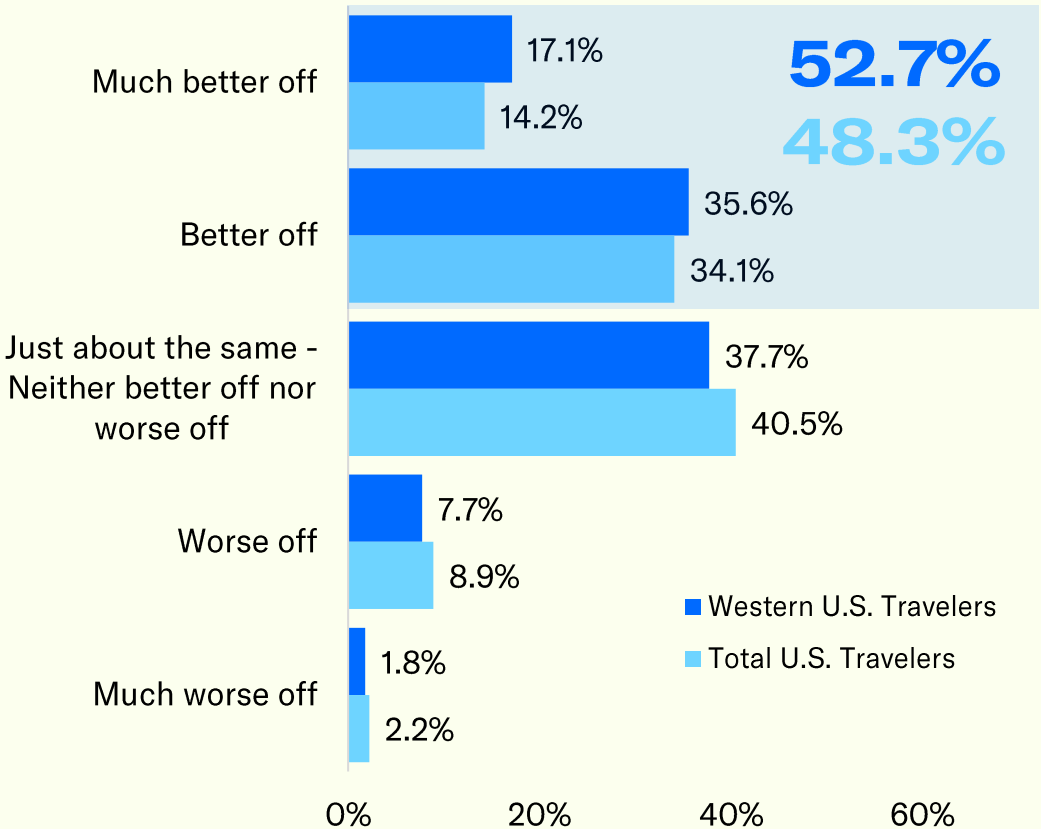
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?
Base: Western U.S. visitors (21,470 completed surveys).

The majority of Western U.S. travelers are optimistic about their financial outlook in the next year.

At 52.7 percent, more than half of Western U.S. travelers expect to be better off financially in the next year, outpacing total U.S. travelers by +4.4 percentage points.

Expectations for Future Finances

In the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Top 2 Box	60.4%	64.6%	64.0%	68.7%	60.9%
Much better off	23.6%	26.2%	26.1%	32.9%	24.0%
Better off	36.8%	38.4%	37.9%	35.7%	36.9%
Unchanged	32.0%	28.1%	29.4%	25.3%	31.0%
Worse off	6.2%	5.7%	5.8%	5.3%	6.6%
Much worse off	1.4%	1.6%	0.8%	0.7%	1.5%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

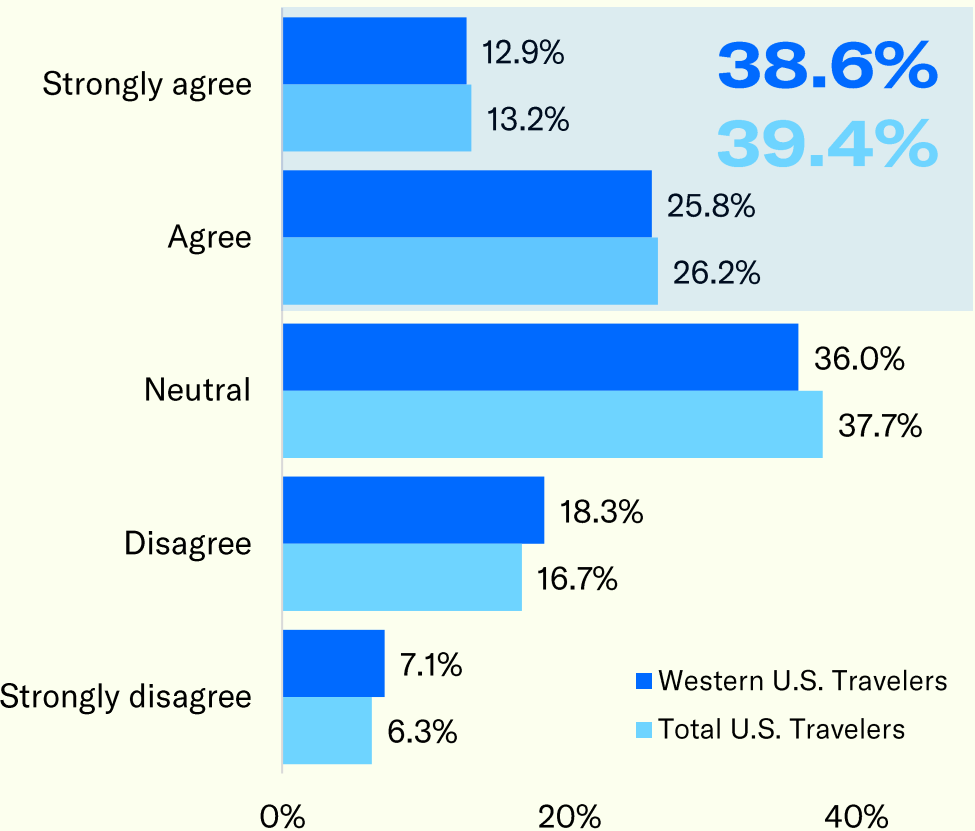
Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

Western U.S. travelers' perception of the U.S. economic outlook mirrors that of total U.S. travelers.

Despite their sunnier financial situation and outlook, relative to total U.S. travelers, Western U.S. travelers' expectations for a U.S. economic recession in the next six months are on par with those of total U.S. travelers (38.6% vs. 39.4%), indicating a sense of financial security and resilience compared to the average traveler.

Expectations of an Economic Recession

In the next 6 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Top 2 Box	38.2%	48.3%	44.6%	47.5%	42.9%
Strongly agree	14.0%	19.7%	16.5%	19.1%	15.4%
Agree	24.2%	28.6%	28.0%	28.4%	27.5%
Neutral	34.5%	31.1%	31.8%	29.9%	32.0%
Disagree	19.6%	14.8%	16.6%	15.0%	18.1%
Strongly disagree	7.7%	5.8%	7.0%	7.5%	6.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

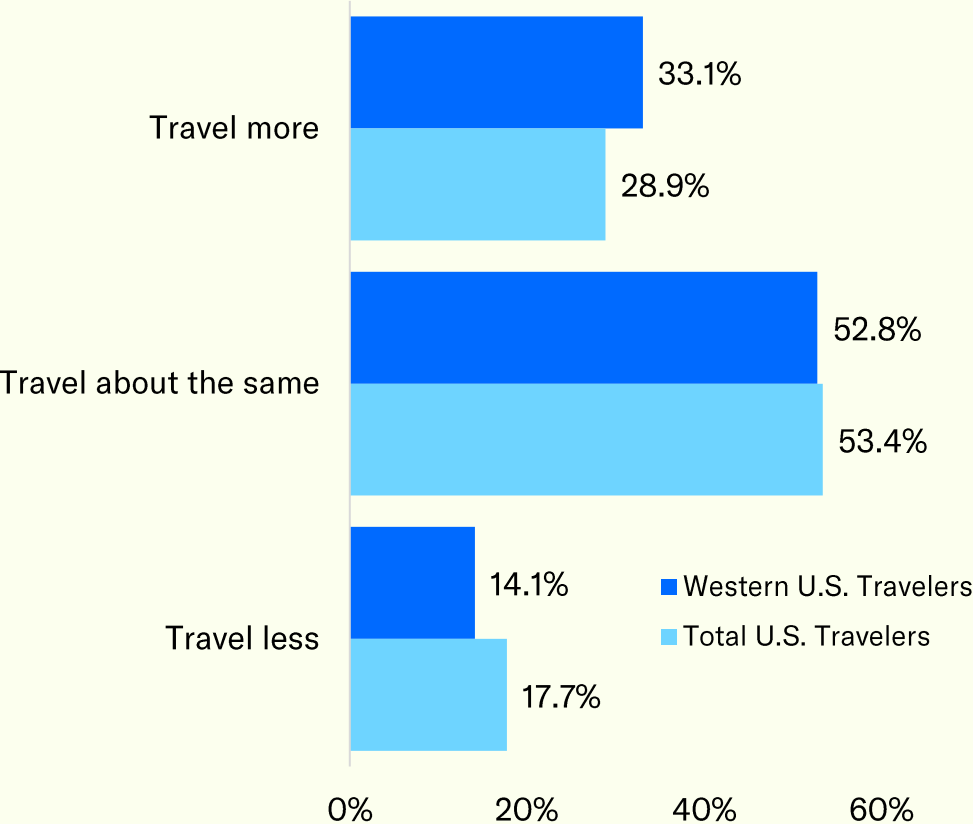
Question: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS. Base: Western U.S. visitors (21,470 completed surveys).

One in three Western U.S. travelers expect to travel more in the coming year.

At a healthy +4.2 percentage points above total U.S. travelers, one-third (33.1%) of Western U.S. travelers anticipate traveling more in the next year compared to the previous year. Only 14.1 percent expect to travel less, slightly below the 17.7 percent reported by total U.S. travelers.

Expected Leisure Travel Volume

Next 12 months compared to the last 12 months



By Segment

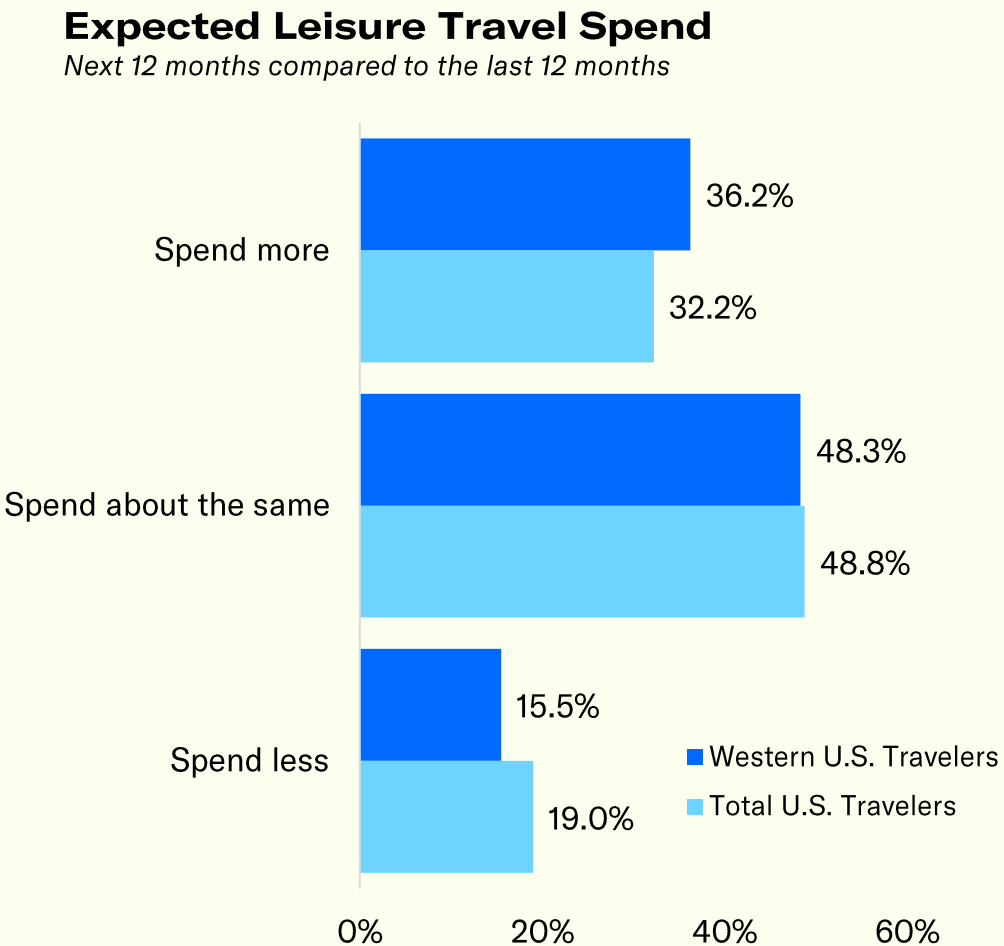
	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Travel more	39.7%	42.9%	43.5%	48.1%	40.5%
Travel about the same	49.4%	47.5%	47.9%	44.1%	47.6%
Travel less	10.9%	9.6%	8.5%	7.8%	11.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: 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?
Base: Western U.S. visitors (21,470 completed surveys).

A similar share anticipate spending more on leisure travel.

Leisure travel spend expectations among Western U.S. travelers mirror their travel volume expectations, with just over one in three (36.2%) saying they will spend more on leisure travel in the next year compared to the previous year. Just 15.5 percent said they will spend less on leisure travel. On both counts, their outlook for leisure travel spend is slightly more positive than total U.S. travelers.



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Spend more	42.0%	42.6%	43.0%	46.1%	42.0%
Spend about the same	46.2%	46.7%	47.0%	44.5%	44.6%
Spend less	11.9%	10.7%	10.0%	9.4%	13.3%
Base	7,344	1,784	3185	2,017	5,948

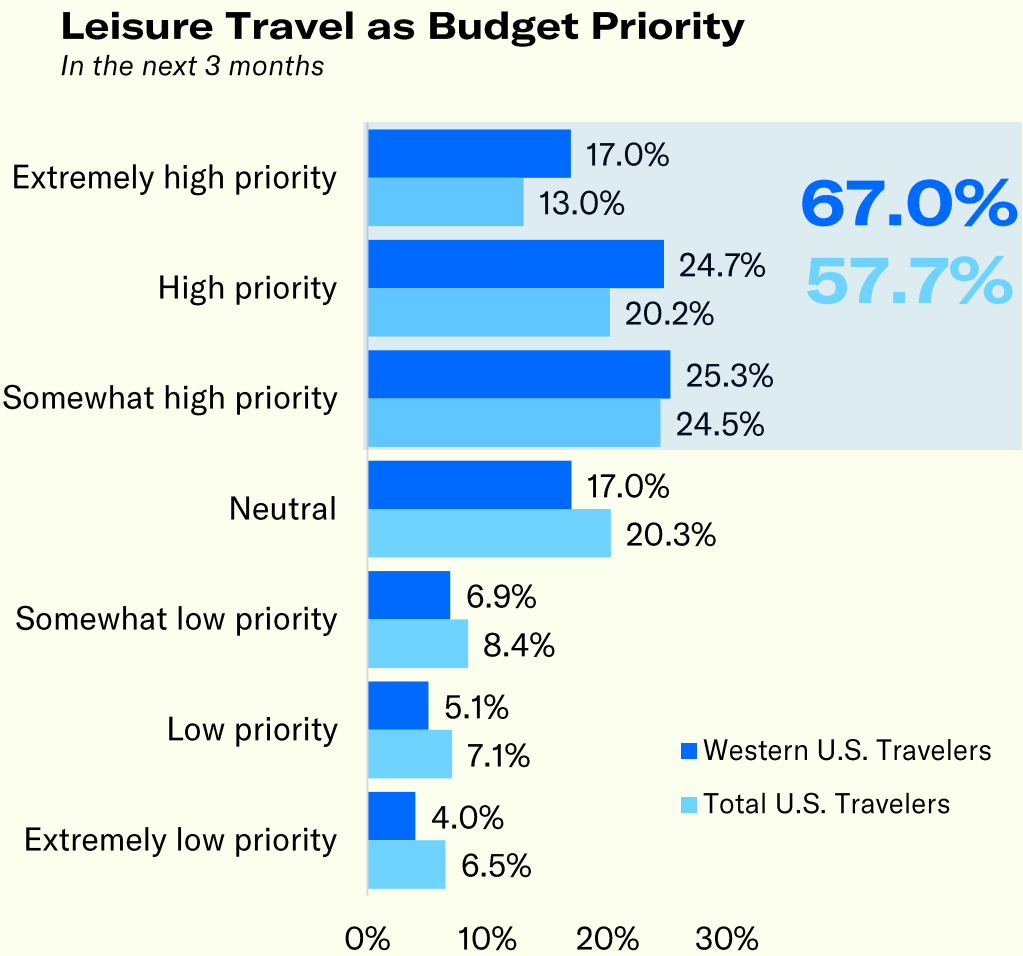
Segment is significantly higher

Question: 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?

Base: Western U.S. visitors (21,470 completed surveys).

Near-term prioritization of leisure travel spending is significantly higher among Western U.S. travelers.

When asked to consider only the next three months, leisure travel was a much higher budget priority among Western U.S. travelers (67.0%) compared to total U.S. travelers (57.7%).



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Top 3 Box	75.5%	77.0%	80.5%	81.1%	74.1%
Extremely high priority	22.2%	24.0%	23.8%	26.0%	20.8%
High priority	28.9%	30.1%	30.9%	32.0%	28.4%
Somewhat high priority	24.4%	22.8%	25.8%	23.0%	24.9%
Neutral	13.9%	13.5%	12.5%	12.1%	14.6%
Somewhat low priority	5.1%	4.4%	3.6%	3.6%	5.2%
Low priority	3.2%	3.4%	2.6%	2.1%	3.6%
Extremely low priority	2.2%	1.8%	0.8%	1.1%	2.5%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

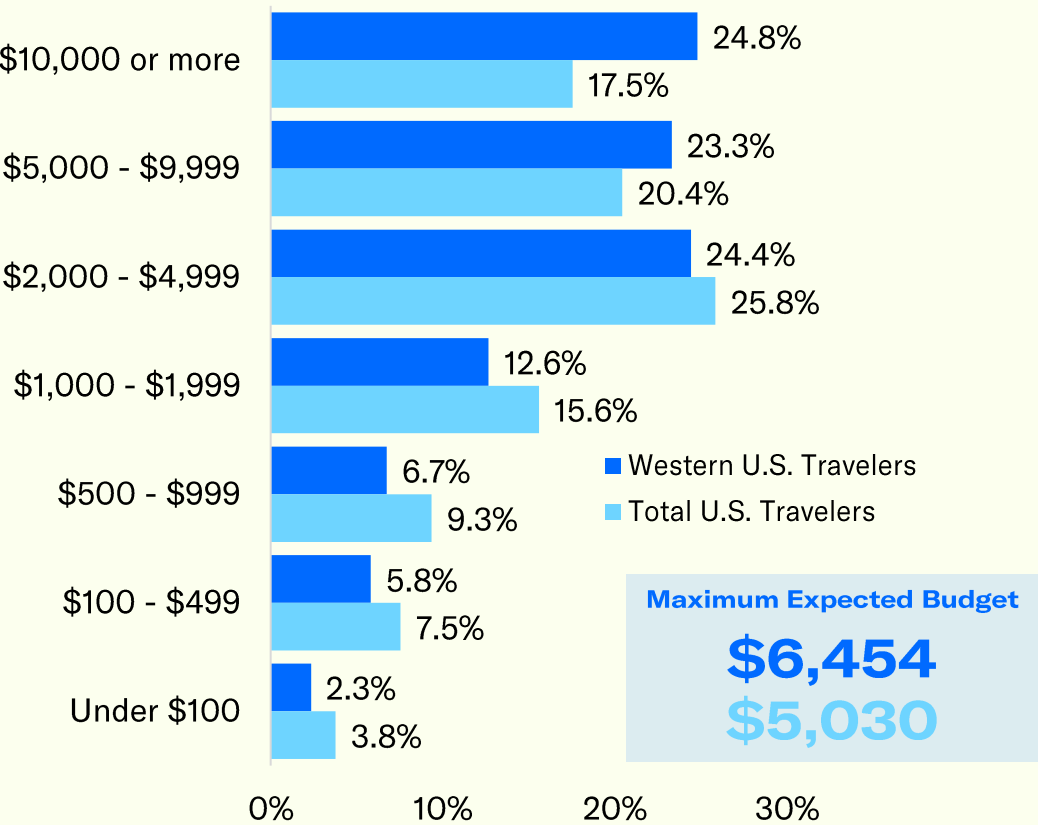
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. Leisure travel will be a(n) _____. Base: Western U.S. visitors (21,470 completed surveys).

Western U.S. travelers’ annual leisure travel budgets are +28.3 percent larger than total U.S. travelers.

Perhaps most telling is the significantly higher maximum expected budget for leisure travel in the next year reported by Western U.S. travelers (\$6,454) versus the still high albeit more modest average reported by total U.S. travelers (\$5,030). In fact, one in four (24.8%) Western U.S. travelers expect to spend \$10,000 or more on leisure travel in the next year.

Maximum Expected Travel Budget

Next 12 Months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
\$10,000 or more	29.6%	27.8%	28.8%	26.2%	27.1%
\$5,000 - \$9,999	25.1%	21.1%	24.1%	22.1%	22.5%
\$2,000 - \$4,999	23.0%	23.6%	22.6%	23.1%	21.5%
\$1,000 - \$1,999	10.1%	12.0%	10.3%	10.8%	12.3%
\$500 - \$999	5.2%	6.6%	6.7%	7.5%	7.0%
\$100 - \$499	5.3%	6.4%	6.1%	8.0%	7.3%
Under \$100	1.8%	2.6%	1.5%	2.2%	2.4%
Mean	\$7,493	\$6,915	\$7,468	\$6,790	\$7,004
Base	7,258	1,763	3150	1,991	5,865

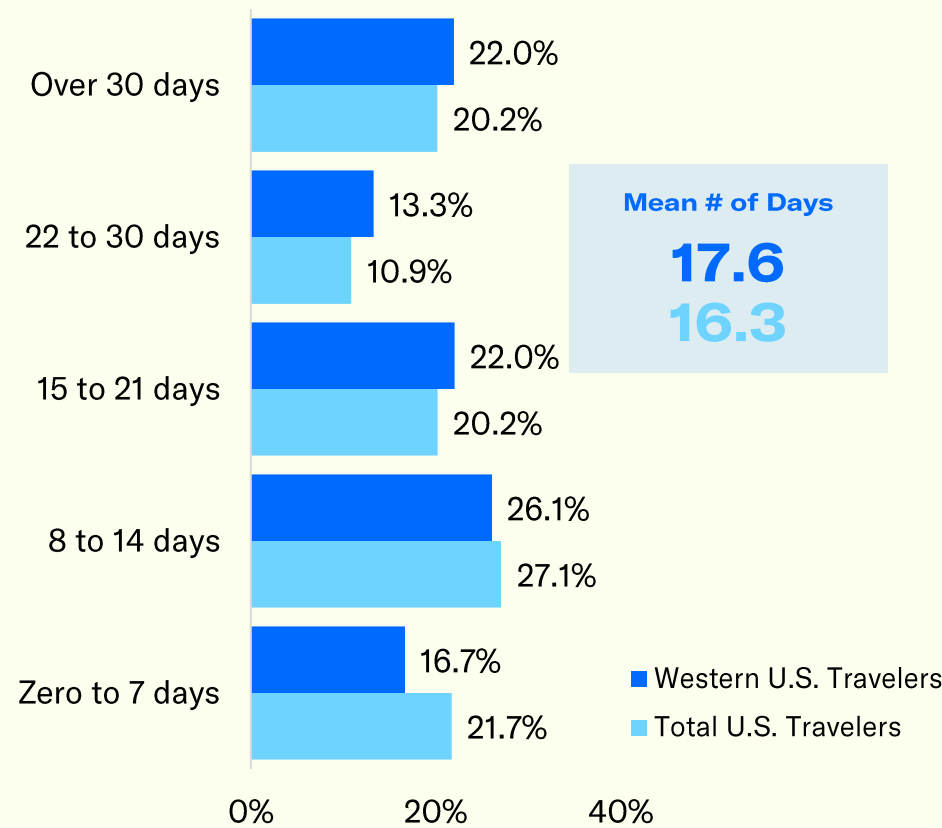
Segment is significantly higher

Western U.S. travelers also have more days available for leisure travel in a year.

With a reported mean of 17.6 days available for leisure travel, Western U.S. travelers present a larger opportunity for destinations to capture market share compared to the average U.S. traveler (16.3 days). Notably, 35.3 percent of Western U.S. travelers have over three weeks' available for leisure travel.

Mean number of days available

For leisure travel in the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Over 30 days	20.5%	18.0%	18.3%	14.8%	19.9%
22 to 30 days	15.1%	13.3%	14.5%	12.2%	13.2%
15 to 21 days	24.1%	24.2%	23.2%	22.8%	22.3%
8 to 14 days	26.3%	30.1%	28.0%	32.5%	27.9%
Zero to 7 days	14.1%	14.4%	16.0%	17.7%	16.7%
Mean	17.9	17.1	17.2	16.0	17.2
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

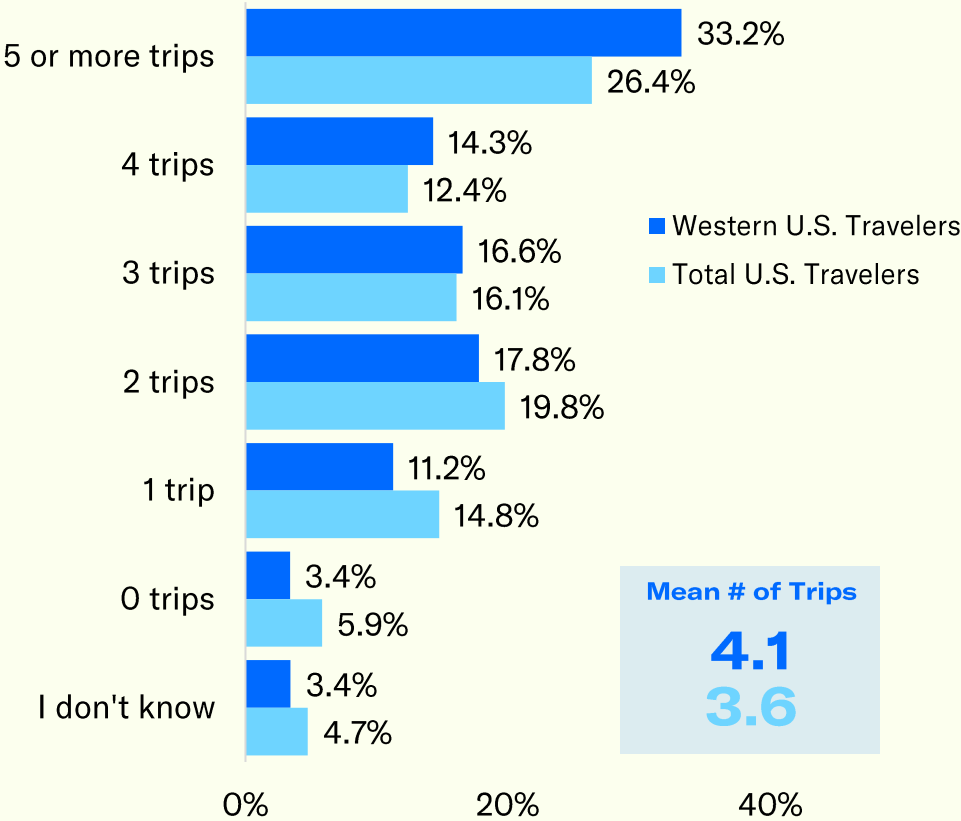
Question: Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS? Base: Western U.S. visitors (21,470 completed surveys).

In addition to having more days available, Western U.S. travelers expect to take more leisure trips across the next 12 months.

Western U.S. travelers have a mean of 4.1 trips that they expect to take in the next year, outpacing total U.S. travelers by +0.5 trips. A third (33.2%) of Western U.S. travelers said they expect to take five or more trips, significantly higher than total U.S. travelers (26.4%).

Mean number of leisure trips expected

In the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
5 or more trips	40.4%	47.0%	42.3%	47.0%	43.0%
4 trips	14.7%	14.9%	16.0%	15.2%	15.4%
3 trips	16.2%	15.3%	15.9%	14.7%	15.3%
2 trips	15.8%	12.6%	14.4%	13.6%	14.8%
1 trip	7.8%	6.5%	7.4%	6.7%	6.6%
0 trips	2.1%	1.8%	1.9%	1.0%	2.3%
I don't know	2.9%	1.9%	2.1%	1.7%	2.6%
Mean	4.5	4.9	4.6	4.9	4.7
Base	7,134	1,750	3,118	1,980	5,784

Segment is significantly higher

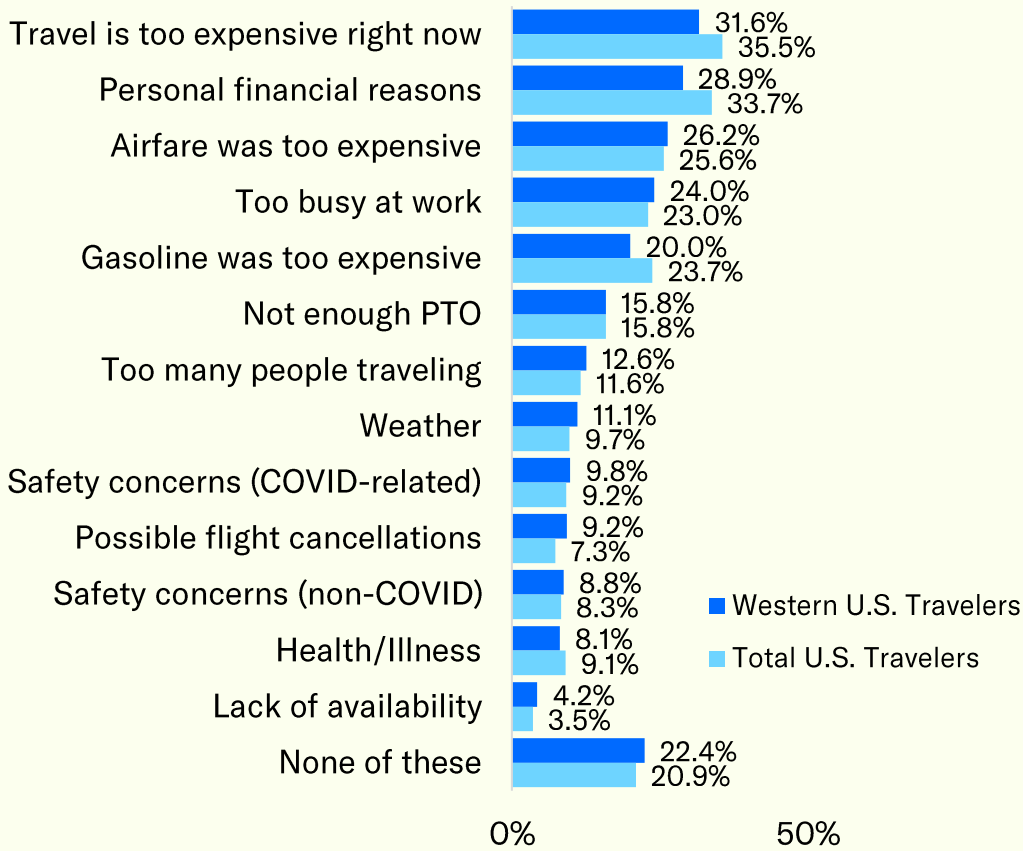
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS? **Base:** Western U.S. visitors (20,726 completed surveys).

Financial barriers are less likely to be a recent barrier to travel for Western U.S. travelers.

Generally, Western U.S. travelers are less likely to cite any of the listed travel barriers as deterrents to recent travel but compared to total U.S. travelers they were most significantly less likely to select personal financial reasons (-4.8 percentage points), travel being too expensive (-3.9 percentage points), or gasoline prices (-3.7 percentage points).

Travel Barriers

Past 6 Months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Travel is too expensive right now	29.1%	32.6%	29.1%	28.6%	31.6%
Personal financial reasons	27.2%	31.0%	25.5%	27.0%	28.0%
Airfare was too expensive	25.2%	28.2%	24.5%	24.4%	26.6%
Too busy at work	26.7%	23.4%	23.8%	25.5%	25.1%
Gasoline was too expensive	16.6%	26.9%	18.9%	20.7%	20.8%
Not enough PTO	16.2%	18.3%	15.8%	17.0%	16.5%
Too many people traveling	12.7%	19.0%	15.4%	16.9%	15.5%
Weather	12.8%	16.5%	16.8%	18.8%	14.5%
Safety concerns (COVID-related)	11.0%	16.9%	13.2%	18.0%	14.1%
Possible flight cancellations	13.5%	17.6%	14.6%	17.0%	14.1%
Safety concerns (non-COVID)	10.0%	16.0%	12.1%	16.2%	12.1%
Health/Illness	7.7%	9.2%	7.7%	10.5%	9.3%
Lack of availability	5.3%	8.8%	7.3%	8.1%	6.4%
None of these	21.9%	15.6%	20.4%	19.0%	16.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

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? Base: Western U.S. visitors (21,470 completed surveys).

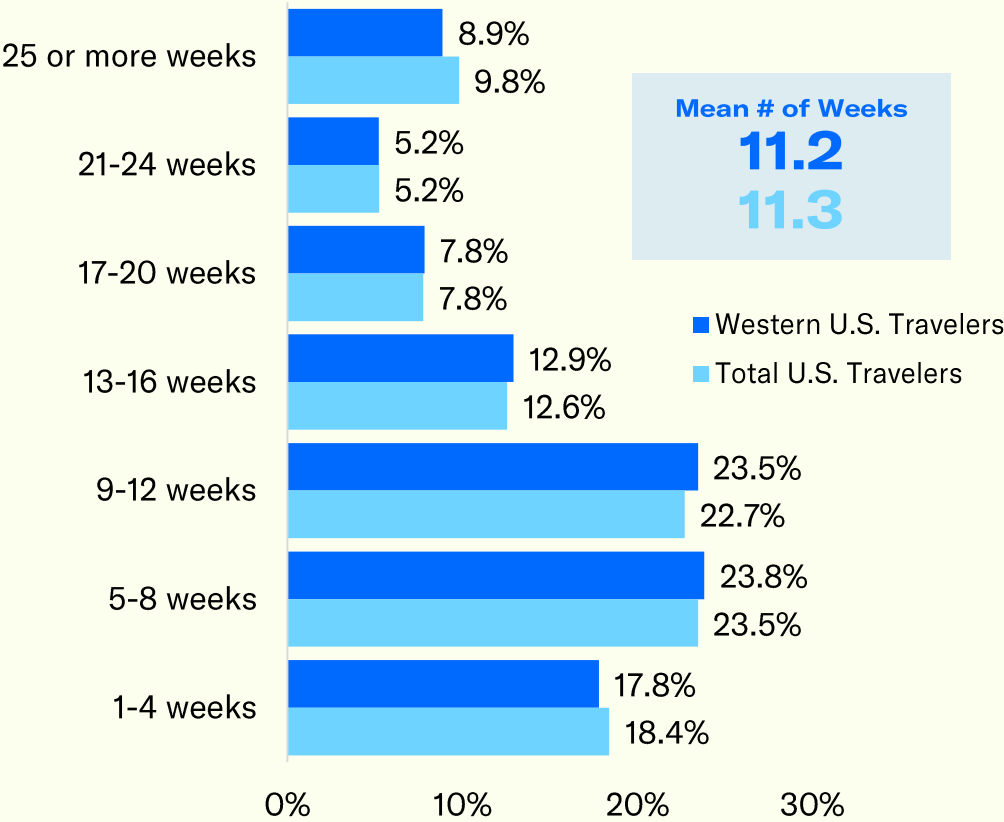
Travel Behaviors

Planning windows for Western U.S. travelers align closely with those of the average U.S. traveler.

In terms of how far in advance Western U.S. travelers are planning domestic leisure trips, at 11.2 weeks on average they are on par with total U.S. travelers (11.3 weeks). Four in ten (41.6%) said they would begin planning within 8 weeks of a domestic leisure trip.

Mean number of weeks for planning

A domestic leisure trip of at least one week in length



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
25 or more weeks	7.2%	7.8%	6.7%	6.3%	7.0%
21-24 weeks	4.5%	4.5%	4.7%	3.3%	4.0%
17-20 weeks	6.6%	6.6%	6.5%	6.0%	6.3%
13-16 weeks	13.0%	12.9%	11.3%	10.7%	12.2%
9-12 weeks	23.4%	22.6%	21.5%	21.5%	23.4%
5-8 weeks	25.4%	26.1%	26.6%	28.2%	25.8%
1-4 weeks	19.8%	19.4%	22.7%	24.0%	21.3%
Mean	10.5	10.6	10.1	9.7	10.3
Base	7,344	1,784	3,185	2,017	5,948

Segment is significantly higher

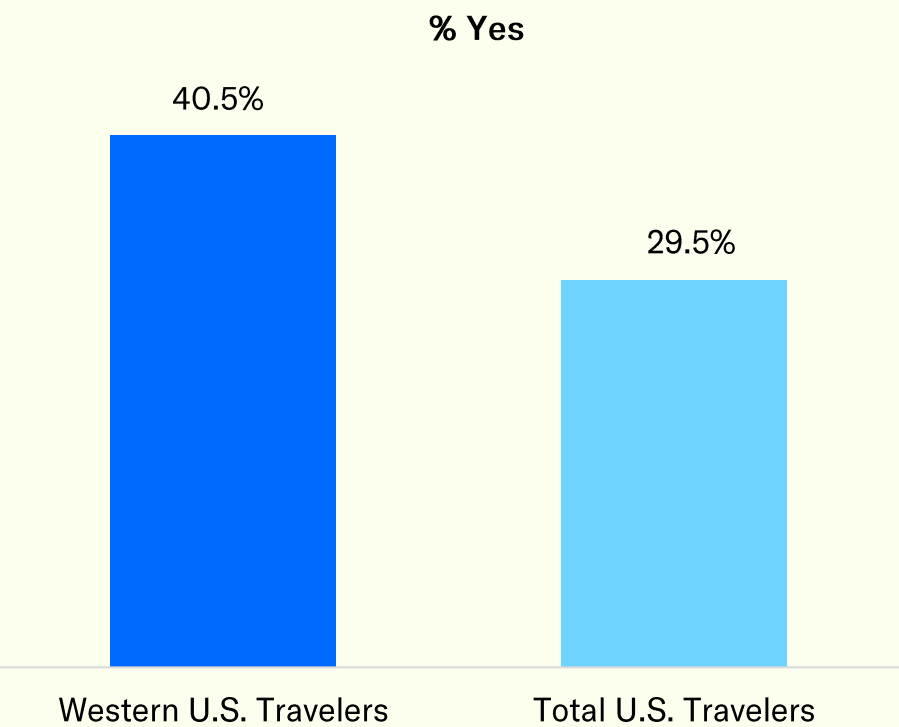
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)? **Base:** Western U.S. visitors (21,470 completed surveys).

A notable share of Western U.S. travelers recently traveled internationally for leisure.

Four in ten (40.5%) Western U.S. travelers have traveled outside of the U.S. in the last year, significantly outpacing total U.S. travelers (29.5%).

Recent International Travel

In the last 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	50.5%	52.4%	54.8%	57.8%	51.3%
No	49.5%	47.6%	45.2%	42.2%	48.7%
Base	7,344	1,784	3,185	2,017	5,948

 Segment is significantly higher

Question: In the PAST 12 MONTHS, have you traveled outside the United States?

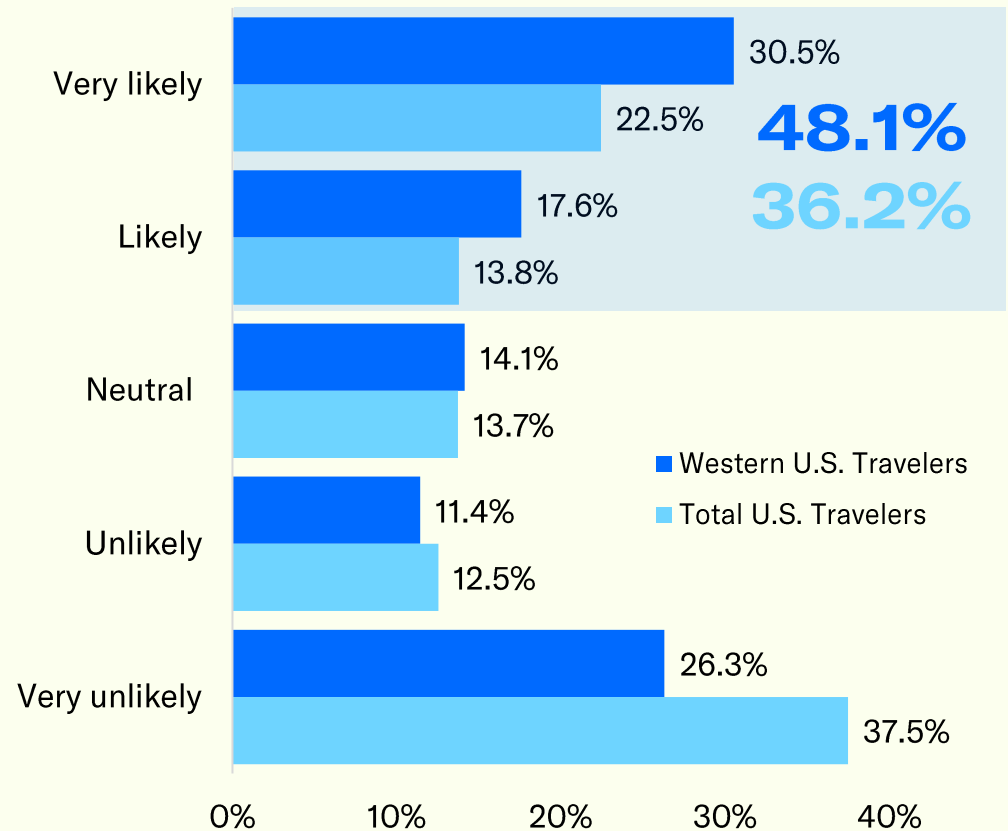
Base: Western U.S. visitors (21,470 completed surveys).

Similarly, they demonstrate a strong intention to travel overseas for leisure in the next year.

Competition from international markets is something to bear in mind when targeting Western U.S. travelers, with nearly half (48.1%) saying they are likely or very likely to travel internationally in the next year. This is significantly higher than the share of total U.S. travelers (36.2%) who say the same.

Near-Term International Travel

In the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Top 2 Box	59.0%	61.8%	64.2%	67.9%	60.0%
Much better off	38.6%	39.1%	39.8%	40.5%	37.5%
Better off	20.3%	22.7%	24.4%	27.4%	22.6%
Unchanged	12.9%	14.5%	14.4%	13.2%	14.1%
Worse off	10.6%	7.8%	8.3%	6.6%	9.0%
Much worse off	17.5%	15.9%	13.1%	12.3%	16.9%
Base	7,344	1,784	3,185	2,017	5,948

Segment is significantly higher

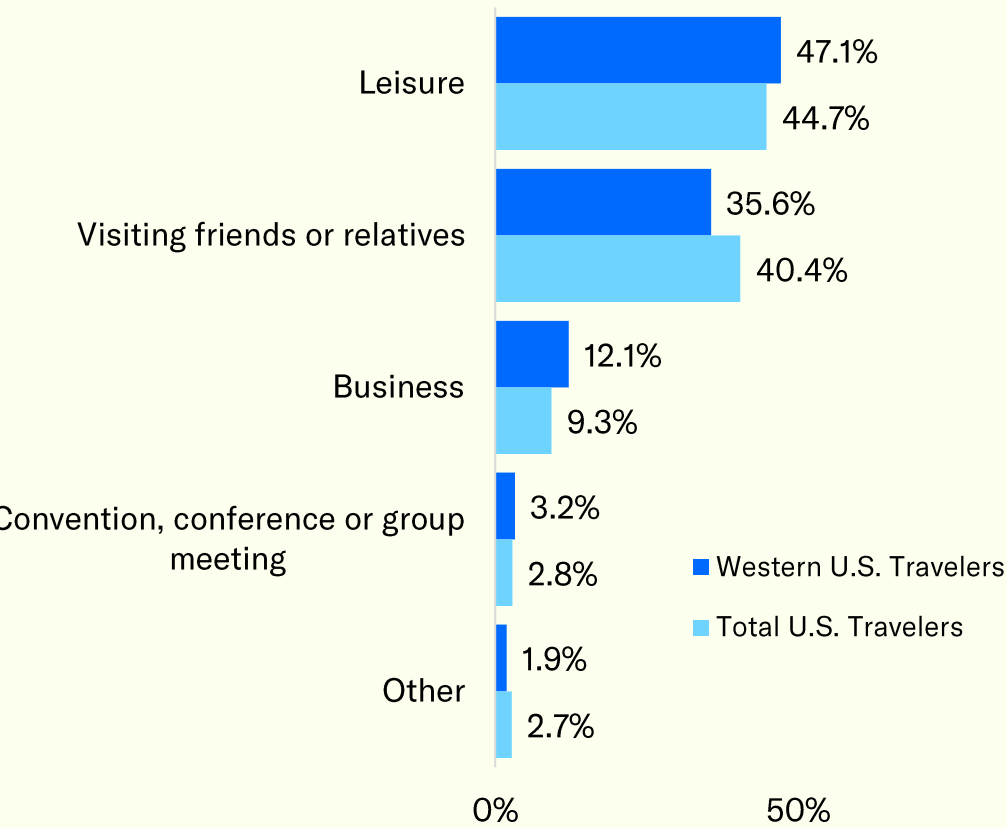
Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS? Base: Western U.S. visitors (21,470 completed surveys).

Western U.S. travelers were significantly more likely to have traveled for leisure than to visit friends/relatives on their last overnight trip.

When asked about their most recent overnight trip, the largest share of Western U.S. travelers said this trip was for leisure (47.1%), just slightly outpacing total U.S. travelers (44.7%). Fewer Western U.S. travelers reported that this most recent overnight trip was to visit friends or relatives (35.6% vs. 40.4%).

Trip Type

Most recent overnight trip



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Leisure	46.2%	57.7%	62.7%	61.8%	46.7%
Visiting friends or relatives	30.4%	28.2%	27.2%	24.6%	33.2%
Business	17.3%	9.7%	6.9%	10.3%	14.6%
Convention, conference, or group meeting	4.4%	3.2%	2.2%	2.4%	4.0%
Other	1.7%	1.3%	1.0%	0.9%	1.6%
Base	7,344	1,784	3,185	2,017	4,926

Segment is significantly higher

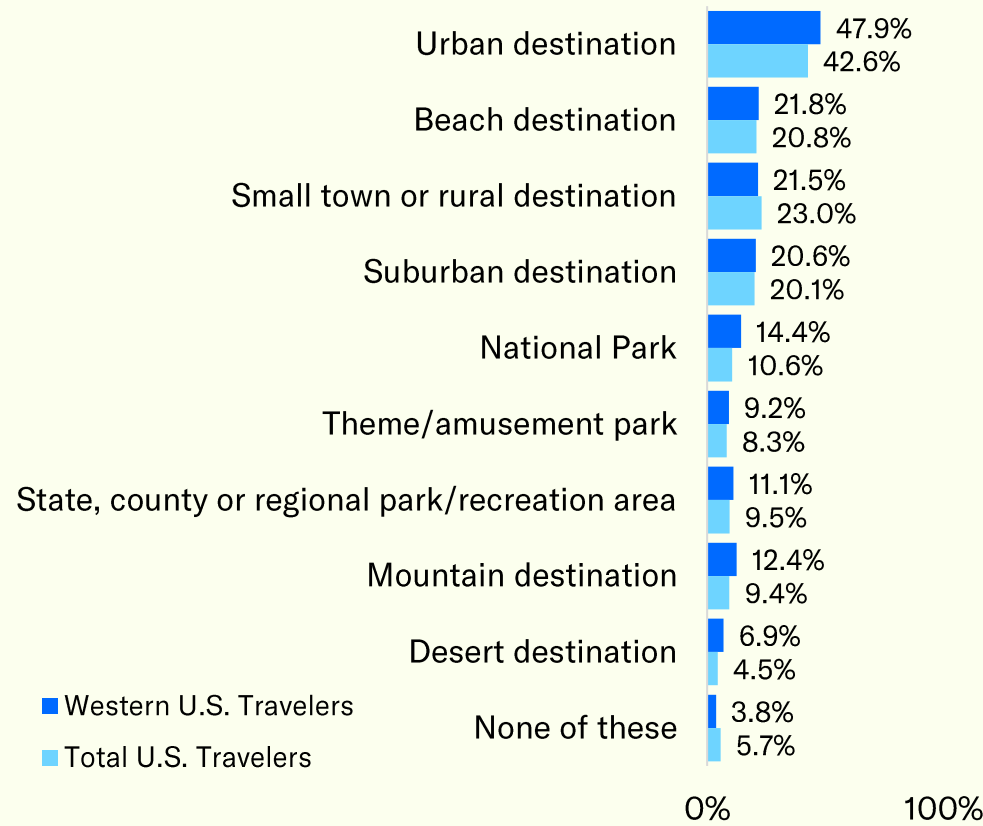
Question: Please tell us about your MOST RECENT OVERNIGHT TRIP. Which best describes this trip? Base: Western U.S. visitors (21,470 completed surveys).

Nearly half of Western U.S. travelers' most recent overnight trip was to an urban destination.

For this most recent overnight trip, generally the destination type(s) aligned closely with those of total U.S. travelers, though Western U.S. travelers are more likely to have gone to an urban destination than total U.S. travelers (47.9% vs. 42.6%), as well as national parks (14.4% vs. 10.6%), and mountain destinations (12.4% vs. 9.4%).

Primary Destination Type

Most recent overnight trip



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Urban destination	100.0%	36.4%	33.8%	45.9%	48.9%
Beach destination	15.4%	26.9%	100.0%	36.2%	26.4%
Small town or rural destination	13.2%	32.0%	18.4%	28.7%	23.9%
Suburban destination	15.0%	21.2%	15.6%	24.2%	23.2%
National Park	13.8%	37.6%	23.8%	100.0%	20.0%
Theme/amusement park	8.9%	14.8%	15.6%	24.0%	10.7%
State, county or regional park or recreation area	10.1%	26.7%	15.3%	30.8%	15.1%
Mountain destination	9.5%	100.0%	15.4%	32.5%	16.6%
Desert destination	5.9%	15.5%	9.7%	15.4%	9.9%
None of these	0.0%	0.0%	0.0%	0.0%	2.5%
Base	7,344	1,784	3185	2,017	4,926

Question: Thinking about the PRIMARY DESTINATION(S) visited on this most recent overnight trip, which of these describe where you visited? (Select all that apply)

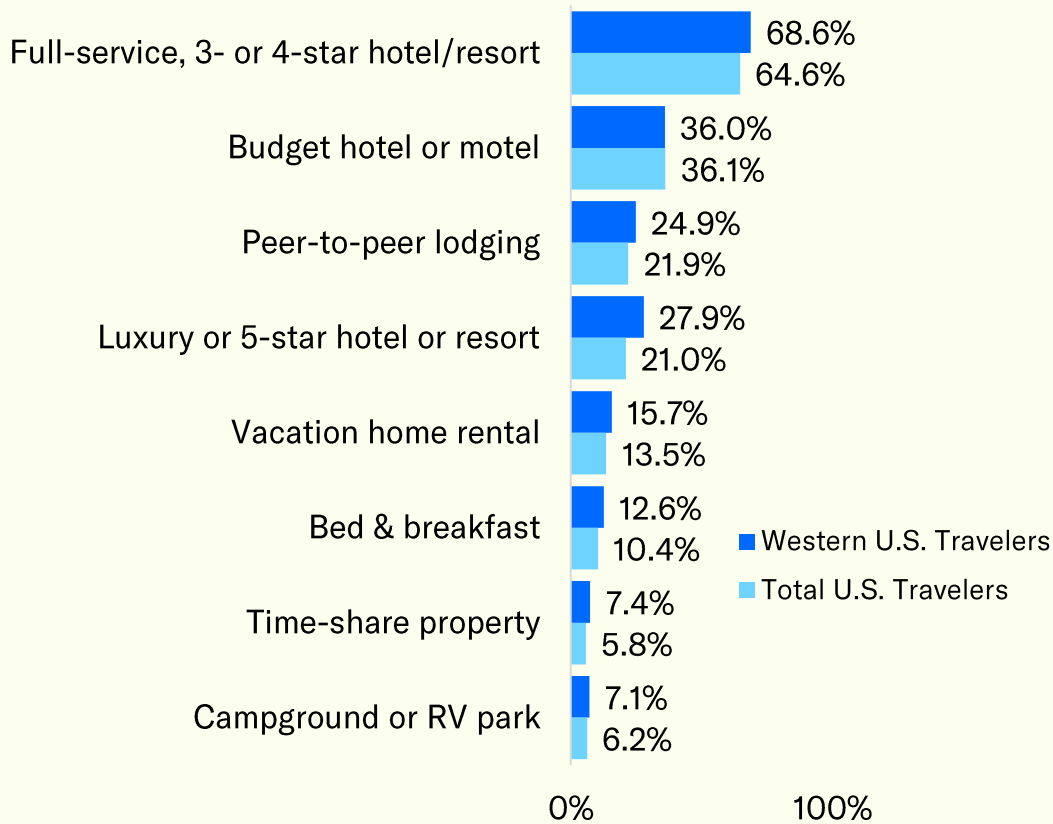
Base: Western U.S. visitors (21,470 completed surveys).

Over one in four Western U.S. travelers stayed in a luxury or 5-star hotel or resort in the past year.

Among Western U.S. travelers who have stayed in paid lodging in the past year, over two-thirds (68.6%) said they have stayed in a full-service, 3- or 4-star hotel or resort, the most commonly used type of lodging reported. Generally, their paid lodging usage mirrors that of total U.S. travelers, though Western U.S. travelers are notably more likely to have stayed in a luxury or 5-star hotel or resort (27.9% vs. 21.0%) in the past year.

Paid Lodging Used

Past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Full-service, 3 or 4-star hotel/resort	73.1%	67.4%	66.0%	63.5%	66.0%
Budget hotel or motel	35.6%	42.3%	33.3%	40.8%	37.7%
Peer-to-peer lodging	27.6%	28.7%	27.5%	27.4%	26.6%
Luxury or 5-star hotel or resort	36.7%	39.6%	40.5%	40.6%	35.3%
Vacation home rental	18.2%	28.3%	23.6%	27.1%	20.9%
Bed & breakfast	14.6%	26.0%	20.1%	24.3%	19.1%
Time-share property	8.3%	12.6%	10.1%	10.2%	9.6%
Campground or RV park	6.5%	11.1%	6.9%	9.6%	8.4%
Base	6,984	1,666	3,028	1,910	5,514

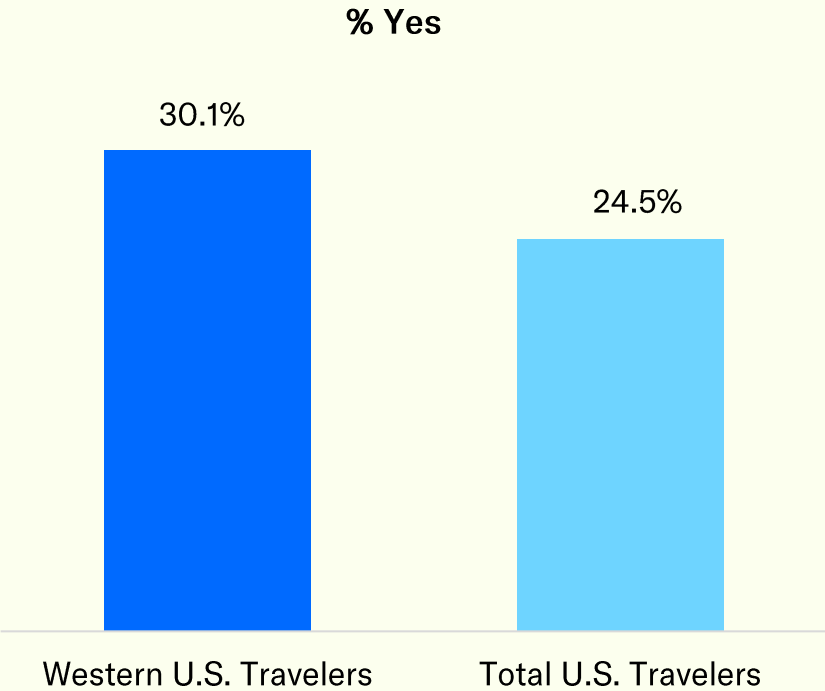
Segment is significantly higher

Question: In the PAST 12 MONTHS, which type of paid lodging have you stayed in? **Base:** Western U.S. visitors who have stayed in paid lodging in the past 12 months (19,406 completed surveys).

Western U.S. travelers are more likely to have traveled for a sporting event in the past year.

Three in ten (30.1%) Western U.S. travelers said they traveled specifically to attend a sporting event in the past year, outpacing one in four (24.5%) total U.S. travelers who said the same.

Traveled to Attend a Sporting Event
Past 12 months



By Segment

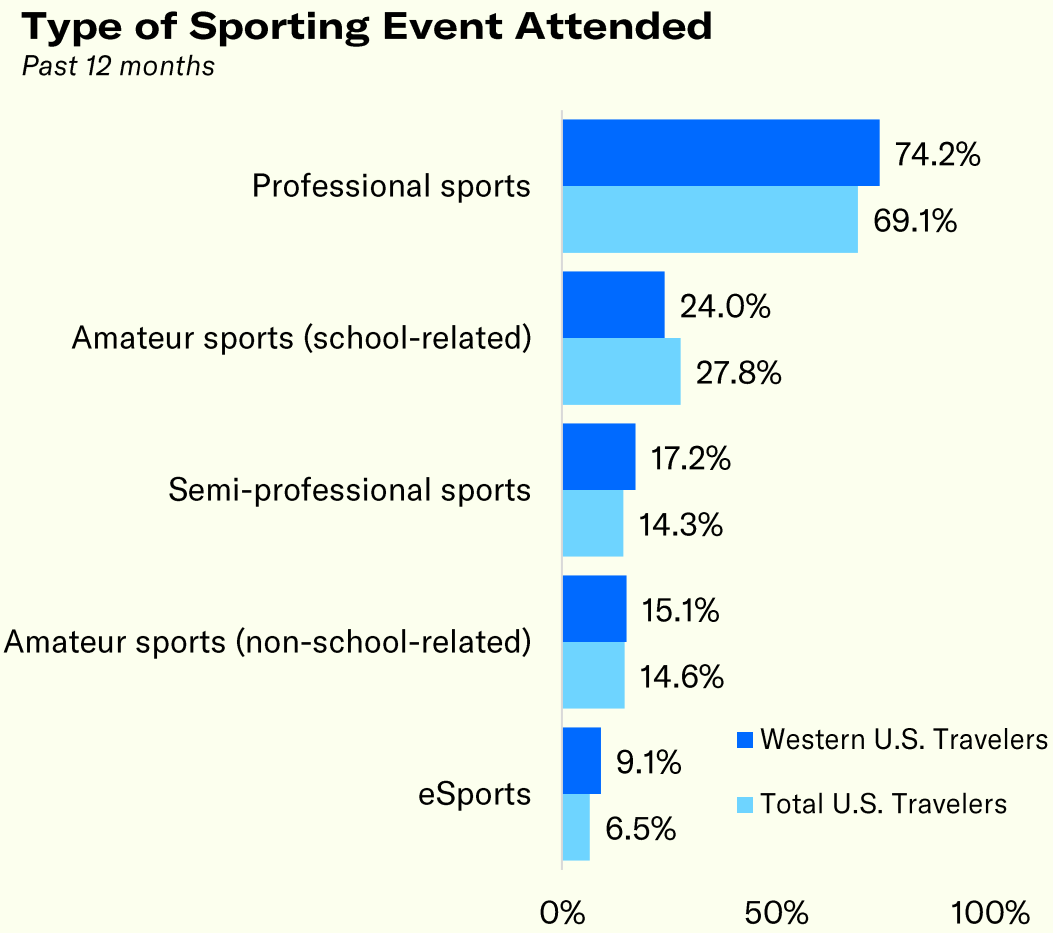
	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	40.6%	46.3%	42.4%	49.8%	41.2%
No	59.4%	53.7%	57.6%	50.2%	58.8%
Base	7,344	1,784	3,185	2,017	5,948

Segment is significantly higher

Question: In the PAST 12 MONTHS, have you traveled specifically to attend a sporting event? Base: Western U.S. visitors (21,470 completed surveys).

Professional sports were more likely to have motivated a trip for a sporting event among Western U.S. travelers.

Three-fourths (74.2%) of Western U.S. travelers who took a trip specifically to attend a sporting event said they traveled for professional sports, ahead of total U.S. travelers (69.1%) by +5.1 percentage points. Also of note, Western U.S. travelers were less likely to say they traveled for school-related amateur sports (24.0% vs. 27.8%).



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Professional sports	79.6%	76.4%	77.5%	78.3%	76.1%
Amateur sports (school-related)	24.2%	24.7%	21.1%	22.4%	22.4%
Semi-professional sports	19.3%	30.5%	27.4%	30.5%	23.3%
Amateur sports (non-school-related)	15.3%	25.2%	15.8%	19.4%	17.6%
eSports	11.7%	19.4%	14.8%	20.3%	13.7%
Base	2,881	800	1,298	982	2,354

Segment is significantly higher

Question: In the PAST 12 MONTHS, which type of sporting events have you traveled to attend? **Base:** Western U.S. visitors who traveled for a sports event in the past 12 months (6,179 completed surveys).

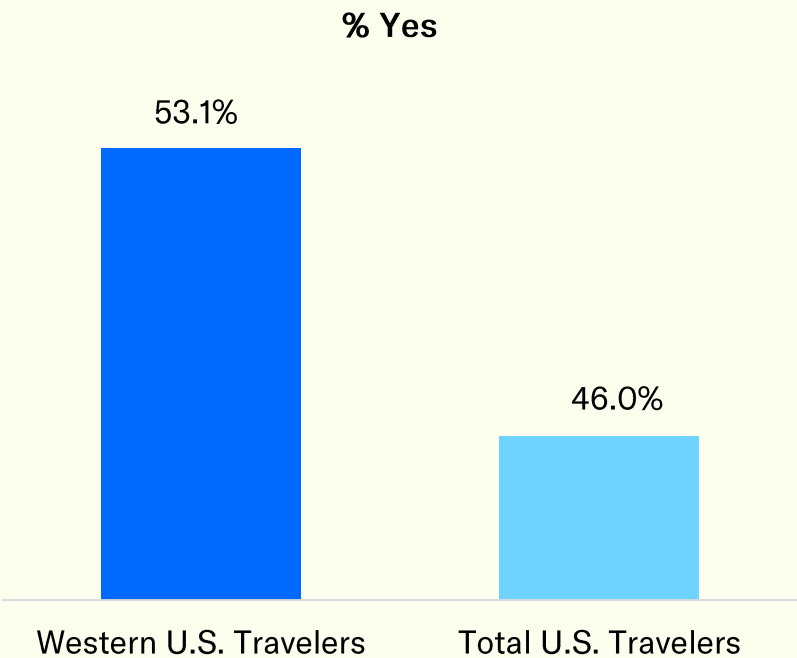
35

Most Western U.S. travelers have traveled for a special event in the past year.

More than half (53.1%) of Western U.S. travelers have taken a trip specifically to attend a special event in the past 12 months, +7.1 percentage points higher than total U.S. travelers (46.0%).

Traveled to Attend a Special Event

Past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	64.5%	72.3%	68.5%	75.1%	66.4%
No	35.5%	27.7%	31.5%	24.9%	33.6%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: In the PAST 12 MONTHS, have you traveled (50-miles or more from your home) specifically to attend a special event of any type?

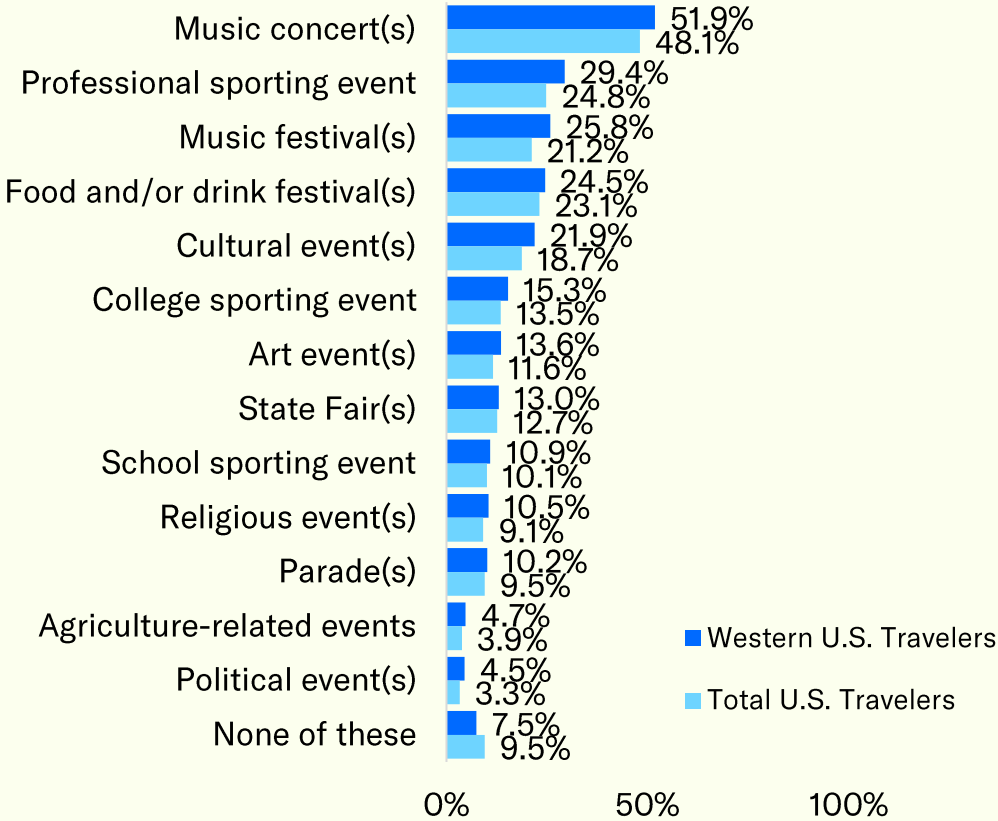
Base: Western U.S. visitors (21,470 completed surveys).

Music events are the top drivers for special event tourism among Western U.S. travelers in the past year.

Among those who traveled to attend a special event in the past year, more than half (51.9%) said they went for a music concert, followed distantly by three in ten (29.4%) who traveled for a professional sporting event, and one in four (25.8%) who reported traveling for a music festival.

Type of Special Event Attended

Past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Music concert(s)	58.7%	58.5%	59.4%	61.0%	56.2%
Professional sporting event	35.6%	36.9%	35.7%	38.9%	34.7%
Music festival(s)	29.7%	37.1%	36.6%	39.6%	33.6%
Food and/or drink festival(s)	27.5%	35.5%	34.3%	35.9%	30.9%
Cultural event(s)	26.5%	31.3%	28.1%	31.5%	28.1%
College sporting event	18.2%	21.5%	19.0%	18.5%	18.0%
Art event(s)	16.2%	20.7%	18.7%	22.3%	18.1%
State Fair(s)	13.2%	20.4%	15.4%	18.4%	15.8%
School sporting event	12.5%	20.5%	15.2%	18.7%	14.3%
Religious event(s)	12.3%	16.7%	15.1%	18.8%	14.1%
Parade(s)	10.8%	16.6%	13.7%	14.8%	12.3%
Agriculture-related events	5.6%	11.7%	6.2%	9.7%	7.1%
Political event(s)	6.2%	8.6%	7.4%	10.0%	6.7%
None of these	5.1%	3.5%	3.6%	3.2%	4.2%
Base	4,853	1,291	2,200	1,534	3,992

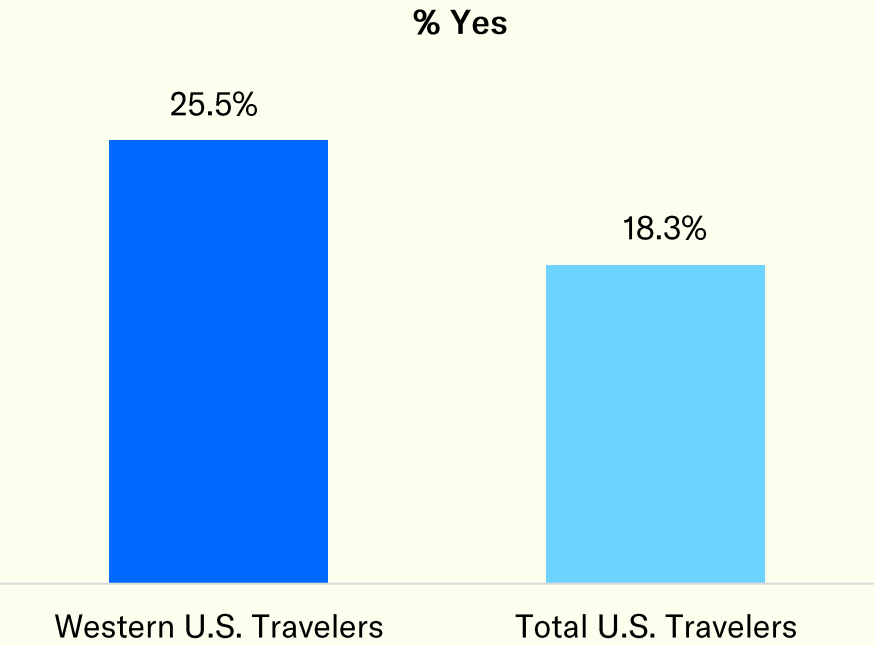
Segment is significantly higher

Question: In the PAST 12 MONTHS, which festivals or special events have you attended while traveling (50-miles or more away from your home)? **Base:** Western U.S. visitors who traveled for a special event in the past 12 months (11,619 completed surveys).

Western U.S. travelers are more likely to have used a travel agent or advisor to plan travel in the past year.

One in four (25.5%) Western U.S. travelers have used a travel agent or advisor to plan travel in the past year, significantly higher than the 18.3 percent reported by total U.S. travelers.

% Used a Travel Agent/Advisor to Plan Trips
Past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	33.4%	43.3%	43.0%	50.8%	37.8%
No	65.1%	55.2%	55.3%	47.3%	60.6%
I don't know	1.5%	1.6%	1.7%	2.0%	1.6%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: In the past 12 months, have you used a TRAVEL AGENT or TRAVEL ADVISOR to help plan any travel? (Please include only human agents or advisors, not online travel agencies where you have no human contact)

Base: Western U.S. visitors (21,470 completed surveys).

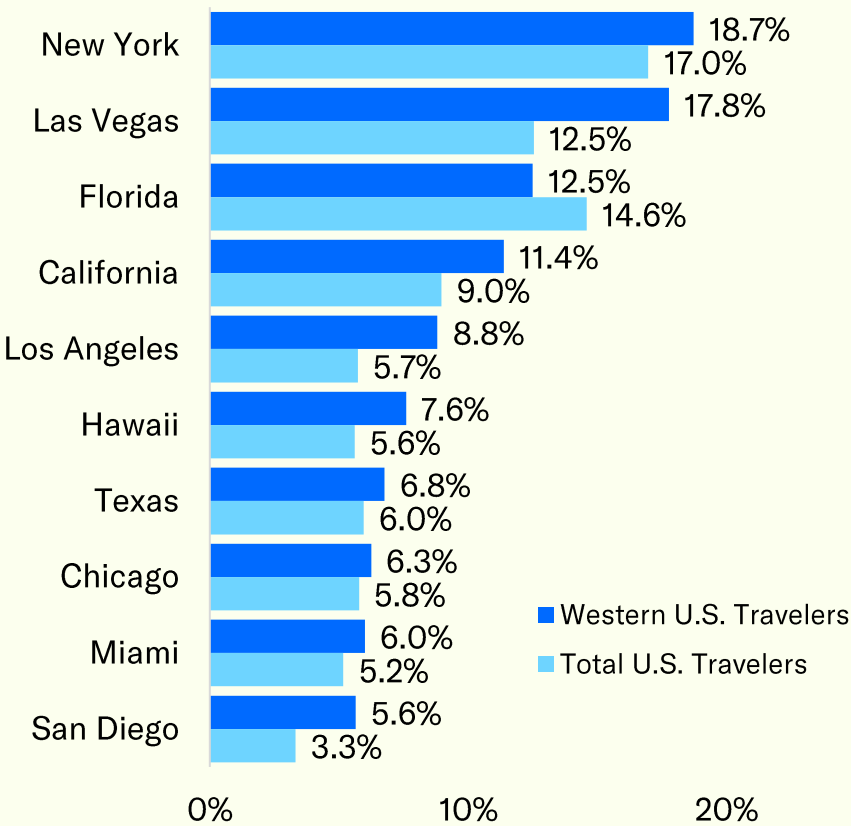
Most Desired Destinations

Western U.S. travelers are more likely to desire domestic destinations that are closer to home.

While New York (18.7%) is the top-mentioned desired domestic destination among Western U.S. travelers, they are particularly more likely than total U.S. travelers to mention Las Vegas (17.8% vs. 12.5%), as well as other Western destinations such as California (11.4% vs. 9.0%), Los Angeles (8.8% vs. 5.7%), Hawaii (7.6% vs. 5.6%), and San Diego (5.6% vs. 3.3%). Conversely, while Florida is the third-most mentioned (12.5%) among Western U.S. travelers, this lags behind the 14.6 percent of total U.S. who also wrote in Florida.

Top 10 Domestic Destinations, Unaided

Most want to visit in the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
New York	24.7%	23.0%	26.9%	27.6%	23.8%
Las Vegas	19.3%	13.7%	16.4%	15.0%	17.3%
Florida	13.1%	16.5%	18.5%	18.0%	13.2%
California	12.7%	13.7%	15.2%	16.3%	13.8%
Los Angeles	11.6%	8.6%	10.0%	10.4%	10.7%
Hawaii	7.6%	7.3%	10.1%	7.4%	8.9%
Texas	7.9%	10.0%	9.0%	12.0%	8.8%
Chicago	8.2%	5.7%	6.8%	8.0%	7.3%
Miami	8.4%	8.0%	10.0%	10.9%	8.1%
San Diego	5.4%	4.3%	5.4%	3.6%	6.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

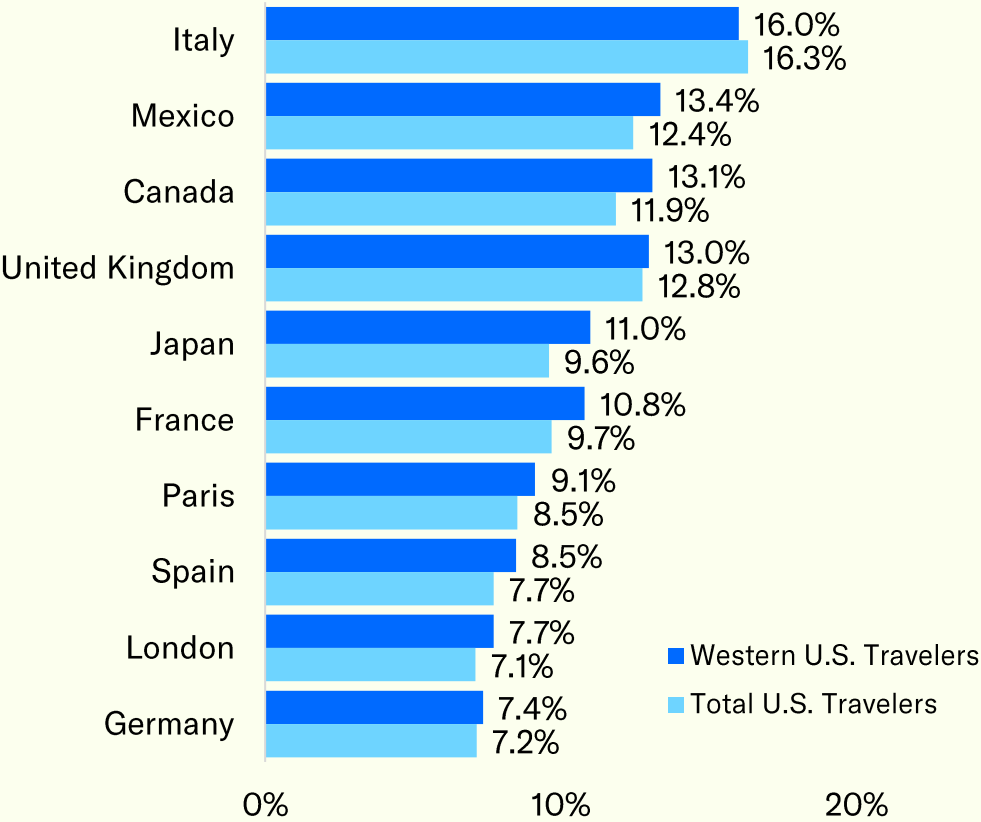
Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) Base: Western U.S. visitors (21,470 completed surveys).

Aside from Japan, European and North American countries are the top-mentioned desired international destinations for Western U.S. travelers.

European and North American destinations top the list of most-mentioned international destinations that Western U.S. visitors would like to visit in the next year, with Italy coming in at number one (16.0%), on par with total U.S. travelers. On the other hand, they are notably more likely to have written in Canada (13.1% vs. 11.9%), Japan (11.0% vs. 9.6%), and France (10.8% vs. 9.7%).

Top 10 International Destinations, Unaided

Most want to visit in the next 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Italy	15.7%	16.0%	16.3%	14.6%	16.8%
Mexico	13.1%	13.7%	13.4%	14.5%	14.3%
Canada	13.7%	16.4%	13.7%	18.2%	14.9%
United Kingdom	14.1%	12.2%	12.5%	15.1%	14.0%
Japan	11.9%	12.4%	11.7%	12.9%	12.5%
France	12.3%	13.9%	14.8%	15.9%	13.3%
Paris	10.7%	11.4%	11.7%	13.8%	11.1%
Spain	9.5%	10.8%	9.8%	10.8%	9.9%
London	9.2%	7.6%	7.6%	8.4%	8.3%
Germany	7.6%	8.2%	8.5%	9.2%	8.1%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) Base: Western U.S. visitors (21,470 completed surveys).

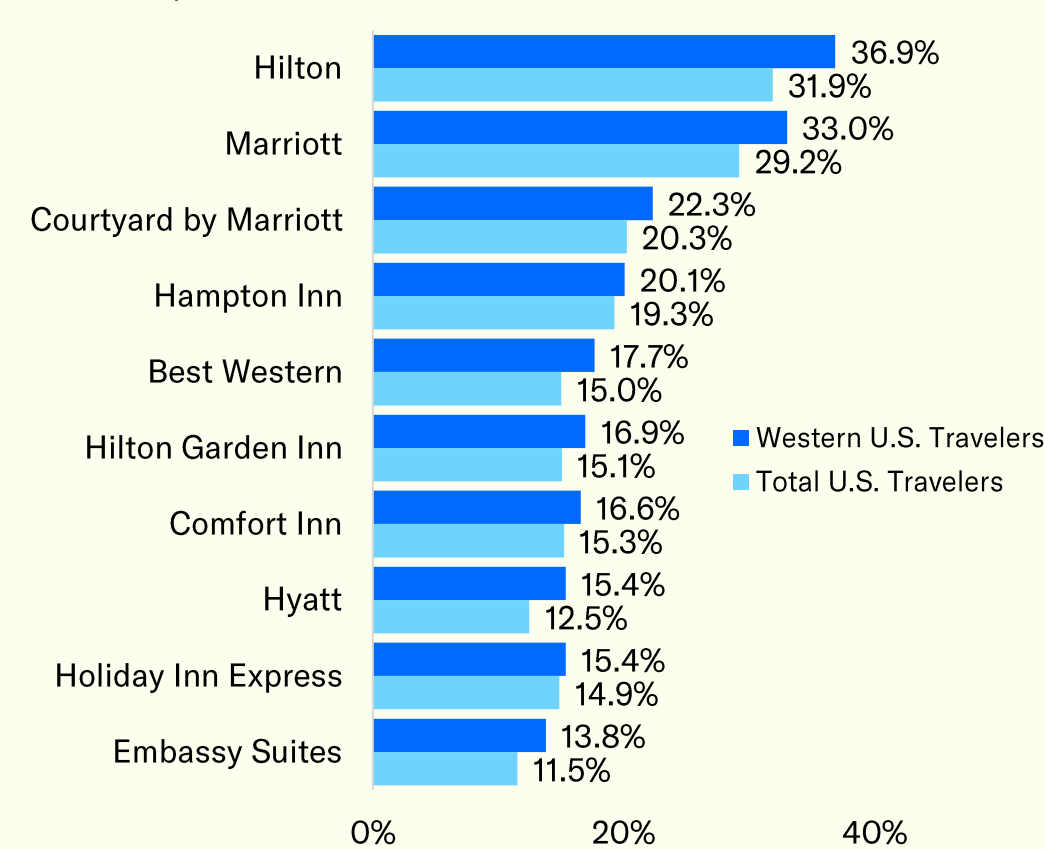
Travel Brands Used

Hilton and Marriot brands top the list of hotels that Western U.S. travelers reported staying at in the past year.

Over one-third of Western U.S. travelers reported using a Hilton (36.9%) or Marriott (33.0%) hotel brand in the past 12 months, with Hilton brand hotel usage notably outpacing that of total U.S. travelers by +5.0 percentage points. Generally, hotel brand usage was higher among Western U.S. travelers compared to total U.S. travelers.

Usage of Top Hotel Brands

Used in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Hilton	44.1%	43.1%	45.6%	46.3%	41.8%
Marriott	38.6%	34.0%	36.2%	34.8%	33.8%
Courtyard by Marriott	27.1%	28.2%	22.5%	21.4%	25.2%
Hampton Inn	22.4%	23.7%	20.1%	22.1%	21.0%
Best Western	19.9%	27.2%	20.8%	25.7%	23.9%
Hilton Garden Inn	20.4%	21.6%	20.0%	20.2%	19.7%
Comfort Inn	19.1%	27.5%	21.7%	31.6%	21.7%
Hyatt	19.1%	19.2%	18.9%	21.3%	17.4%
Holiday Inn Express	16.1%	18.2%	16.4%	19.4%	16.3%
Embassy Suites	17.1%	19.1%	16.0%	18.0%	17.6%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: In the PAST 12 MONTHS, in which of these hotel brands have you stayed?

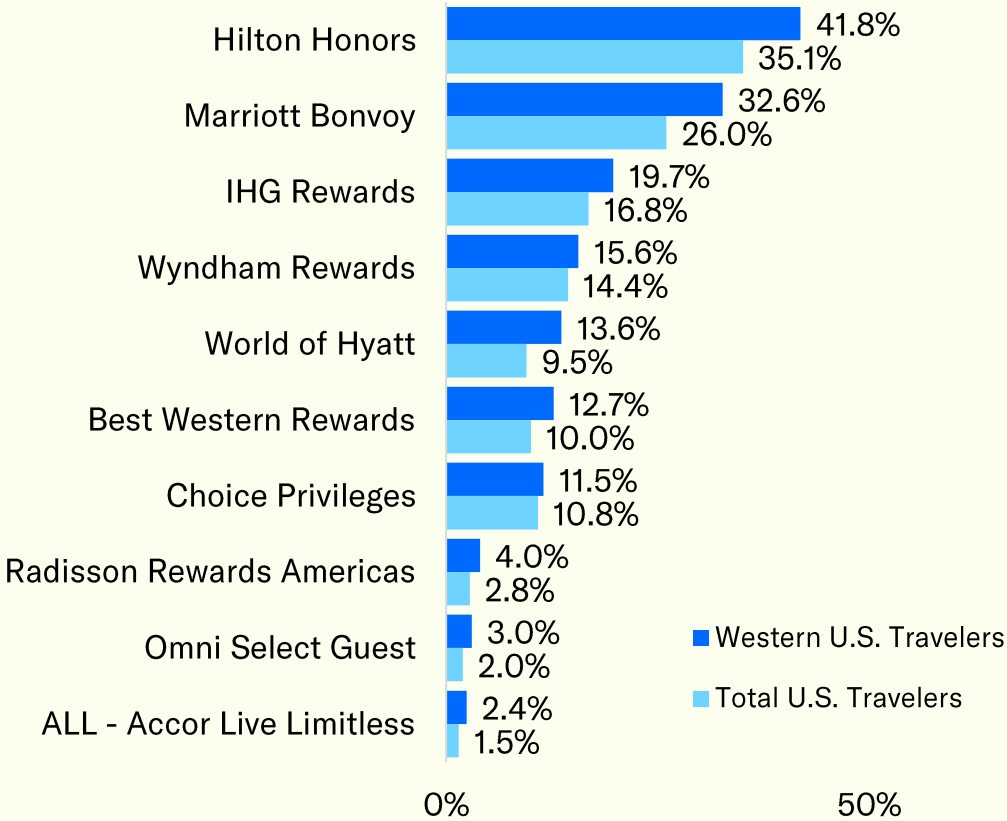
Base: Western U.S. visitors (21,470 completed surveys).

Over four in ten Western U.S. travelers reported that they currently use the Hilton Honors rewards program.

Given their strong usage of Hilton and Marriott hotel brands in the last year, unsurprisingly, Western U.S. travelers are also significantly more likely to say that they currently use the Hilton Honors (41.8%) or Marriott Bonvoy (32.6%) rewards programs, outpacing total U.S. travelers by +6.7 and +6.6 percentage points, respectively.

Top 10 Hotel Rewards Programs

Currently used



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Hilton Honors	50.0%	44.4%	48.0%	46.5%	45.0%
Marriott Bonvoy	39.8%	35.8%	35.7%	34.2%	34.3%
IHG Rewards	22.8%	21.1%	19.9%	19.0%	20.4%
Wyndham Rewards	17.3%	21.7%	18.5%	18.9%	17.7%
World of Hyatt	18.5%	20.2%	18.7%	21.2%	18.1%
Best Western Rewards	14.4%	19.8%	14.6%	20.0%	17.2%
Choice Privileges	12.5%	14.7%	11.3%	14.4%	13.0%
Radisson Rewards Americas	5.6%	9.3%	6.6%	8.3%	6.5%
Omni Select Guest	4.6%	8.0%	5.3%	6.2%	5.5%
ALL - Accor Live Limitless	4.3%	4.8%	3.9%	5.3%	4.1%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: Which of these HOTEL REWARDS PROGRAMS do you currently use?

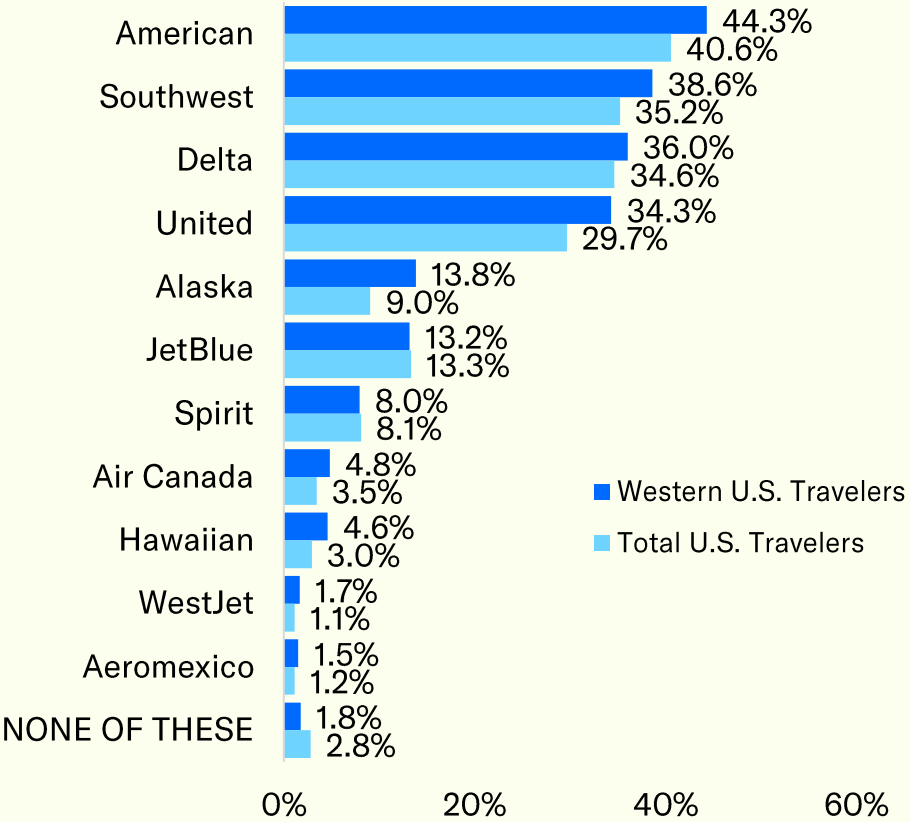
(Select all that apply) Base: Western U.S. visitors (21,470 completed surveys).

American Airlines and Southwest Airlines rank highest as airlines used by Western U.S. travelers in the past 12 months.

Over four in ten (44.3%) Western U.S. travelers said they have flown with American Airlines in the past year, followed by 38.6 percent who have flown with Southwest Airlines, and just over a third who have used Delta Airlines (36.0%) or United (34.3%) in that period. Western U.S. travelers were significantly more likely to have flown with Alaska Airlines (13.8% vs. 9.0%), Air Canada (4.8% vs. 3.5%), or Hawaiian Airlines (4.6% vs. 3.0%) compared to total U.S. travelers.

Airline Rankings

By % used in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
American	52.4%	53.0%	52.5%	56.5%	49.9%
Southwest	38.7%	38.8%	35.5%	30.6%	37.5%
Delta	40.7%	45.2%	41.3%	46.8%	39.1%
United	39.1%	42.8%	39.2%	45.3%	38.8%
Alaska	16.0%	18.7%	15.6%	19.2%	19.9%
JetBlue	17.4%	23.2%	20.2%	24.5%	18.0%
Spirit	9.1%	11.8%	10.3%	10.8%	8.7%
Air Canada	6.6%	11.4%	7.5%	11.1%	8.5%
Hawaiian	5.0%	7.4%	6.9%	7.6%	6.3%
WestJet	2.1%	5.5%	3.8%	4.9%	3.6%
Aeromexico	2.1%	4.2%	3.0%	3.1%	3.0%
NONE OF THESE	1.2%	0.9%	0.8%	0.7%	1.2%
Base	6,388	1,476	2,731	1,679	4,833

Segment is significantly higher

Question: Which of these airlines have you flown on in the PAST 12 MONTHS?

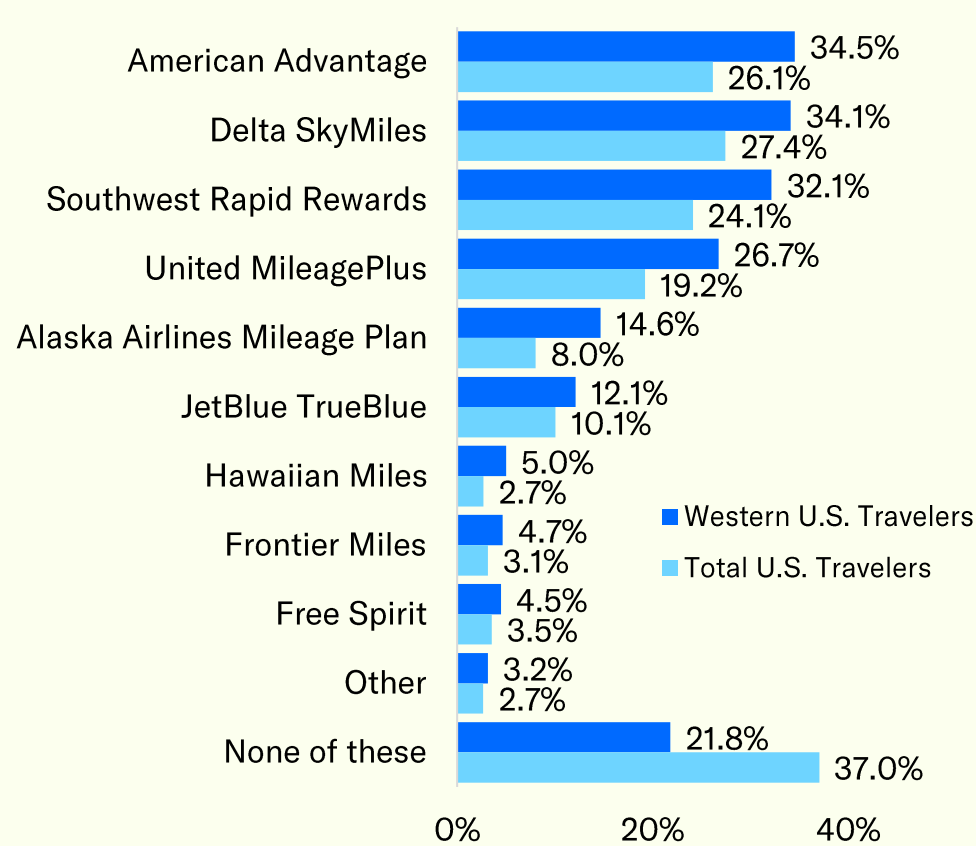
(Select all that apply) Base: Western U.S. visitors (17,050 completed surveys).

About eight in ten Western U.S. travelers currently use an airline rewards program.

Roughly one in three Western U.S. travelers said they currently use American Advantage (34.5%), Delta SkyMiles (34.1%), and Southwest Rapid Rewards (32.1%). Notably, while Southwest outranks Delta in airline usage in the past year, these travelers are slightly more likely to use Delta’s rewards program than Southwest’s. Overall, Western U.S. travelers are more likely to use any airline rewards program, with only one in five (21.8%) saying they are not currently using any, compared to over one in three (37.0%) total U.S. travelers).

Airline Rewards Programs

% currently used



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
American Advantage	41.4%	38.7%	39.9%	41.0%	37.2%
Delta SkyMiles	40.3%	40.1%	41.0%	41.7%	36.1%
Southwest Rapid Rewards	33.8%	31.5%	30.6%	25.0%	32.4%
United MileagePlus	31.5%	32.7%	29.1%	31.1%	29.2%
Alaska Airlines Mileage Plan	17.7%	20.3%	18.7%	21.1%	22.4%
JetBlue TrueBlue	16.1%	20.0%	19.6%	22.3%	17.0%
Hawaiian Miles	5.9%	7.8%	7.2%	8.3%	7.7%
Frontier Miles	5.9%	9.9%	7.3%	9.0%	6.2%
Free Spirit	5.8%	8.0%	6.8%	7.7%	6.1%
Other	3.7%	3.1%	2.9%	2.7%	3.0%
None of these	15.4%	15.3%	12.6%	14.6%	14.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: Which of these AIRLINE REWARDS PROGRAMS do you currently use?

(Select all that apply) Base: Western U.S. visitors (21,470 completed surveys).

Media Engagement

Online search, email are the top marketing channels for Western U.S. travelers, but social media is also an integral part of their media mix.

Western U.S. travelers are most receptive to learning about new destinations through online search (38.0%), followed closely by email (37.1%) Three in ten (30.5%) reported being open to destination marketing on Facebook (30.5%), while about one in four said online content (27.7%) or Instagram (26.0%) were the best places to reach them with messaging. Compared to total U.S. travelers, they are much more likely to be receptive to marketing on Instagram in particular (+5.8 percentage points).

Top 10 Marketing Channels



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Online search	38.6%	37.8%	34.9%	35.8%	37.3%
Email	40.2%	41.2%	39.3%	44.7%	41.3%
Facebook	36.4%	45.1%	43.3%	50.7%	37.2%
Online content	31.0%	31.3%	28.3%	32.8%	29.5%
Instagram	32.7%	39.5%	38.6%	45.8%	34.7%
Streaming video services	22.5%	24.4%	22.9%	28.5%	22.3%
Review websites	20.1%	16.5%	17.6%	17.5%	18.7%
TikTok	19.9%	28.8%	25.1%	30.1%	21.5%
Print travel/lifestyle magazines	15.9%	17.7%	16.5%	20.5%	17.7%
Travel podcasts	16.0%	22.3%	18.7%	23.6%	17.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

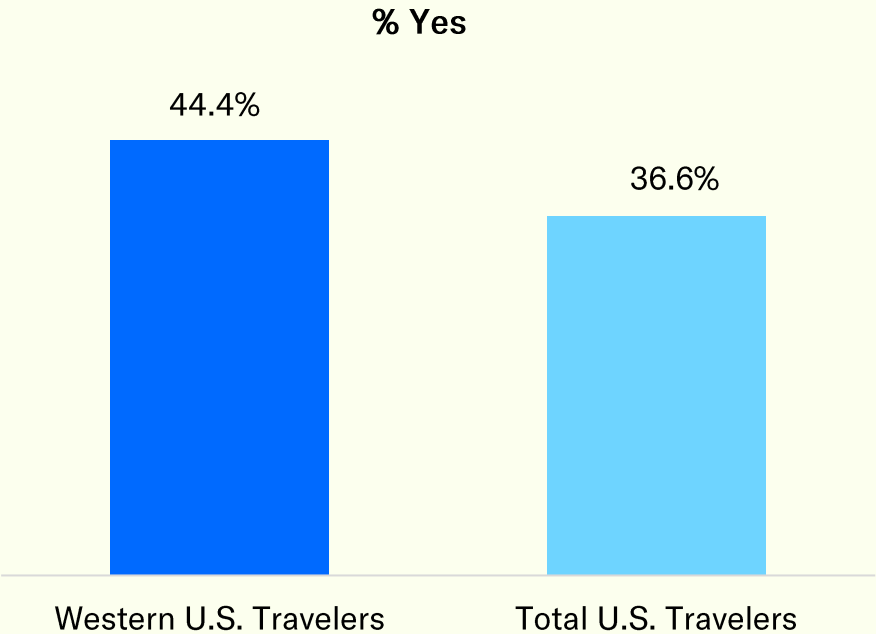
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Select all that apply)

Base: Western U.S. visitors (21,470 completed surveys).

More than four in ten Western U.S. travelers have used online video to plan travel in the past year.


Online video was reported as a travel planning resource for 44.4 percent of Western U.S. travelers, outpacing total U.S. travelers (36.6%) by a significant +7.8 percentage points.

Used Online Video
To plan travel in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	54.6%	62.7%	60.9%	69.3%	56.7%
No	43.1%	34.6%	36.9%	28.4%	40.9%
I don't know	2.3%	2.7%	2.3%	2.3%	2.3%
Base	7,344	1,784	3185	2,017	5,948

 Segment is significantly higher

Question: In the past 12 months, have you used ONLINE VIDEO including visiting video sharing websites to plan any travel?

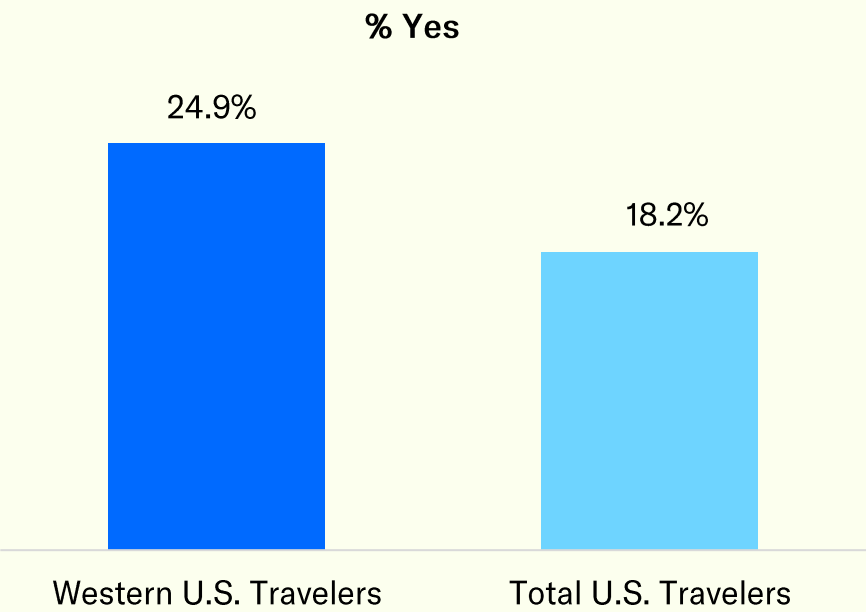
Base: Western U.S. visitors (21,470 completed surveys).

Influencers are still a travel planning resource for a quarter of Western U.S. travelers.

One in four (24.9%) Western U.S. travelers said they have turned to the opinions of an influencer to help plan their travels in the past year, +6.7 percentage points ahead of total U.S. travelers.

% Used Influencers

Past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	33.6%	44.7%	41.2%	48.1%	37.9%
No	63.4%	51.5%	55.6%	47.9%	58.9%
I don't know	2.9%	3.8%	3.2%	4.1%	3.2%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?

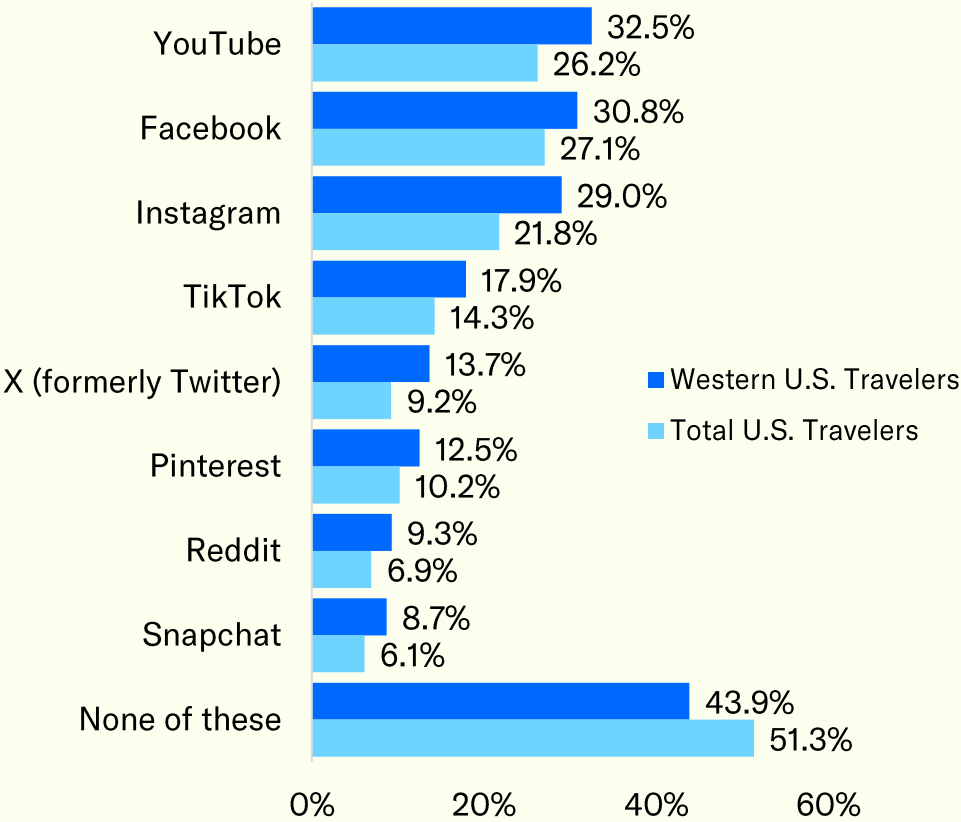
Base: Western U.S. visitors (21,470 completed surveys).

More than half of Western U.S. travelers said social media helped them with trip planning in the past year.

The majority (56.1%) of Western U.S. travelers have used social media to plan travel in the past year, with YouTube being the most-used platform (32.5%), followed by Facebook (30.8%) and Instagram (29.0%).

Social Media Platforms

% used to plan travel in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
YouTube	40.2%	49.6%	47.6%	58.8%	44.1%
Facebook	39.3%	48.9%	47.0%	57.0%	41.6%
Instagram	38.6%	48.4%	47.7%	56.4%	41.7%
TikTok	24.3%	33.7%	31.7%	39.3%	26.0%
X (formerly Twitter)	21.0%	27.9%	28.0%	36.0%	23.4%
Pinterest	15.4%	22.7%	20.4%	25.4%	18.5%
Reddit	12.8%	14.9%	14.3%	18.1%	13.3%
Snapchat	12.8%	21.1%	17.7%	25.1%	15.5%
None of these	33.7%	23.9%	24.2%	16.6%	29.1%
Base	7,344	1,784	3185	2,017	5,948

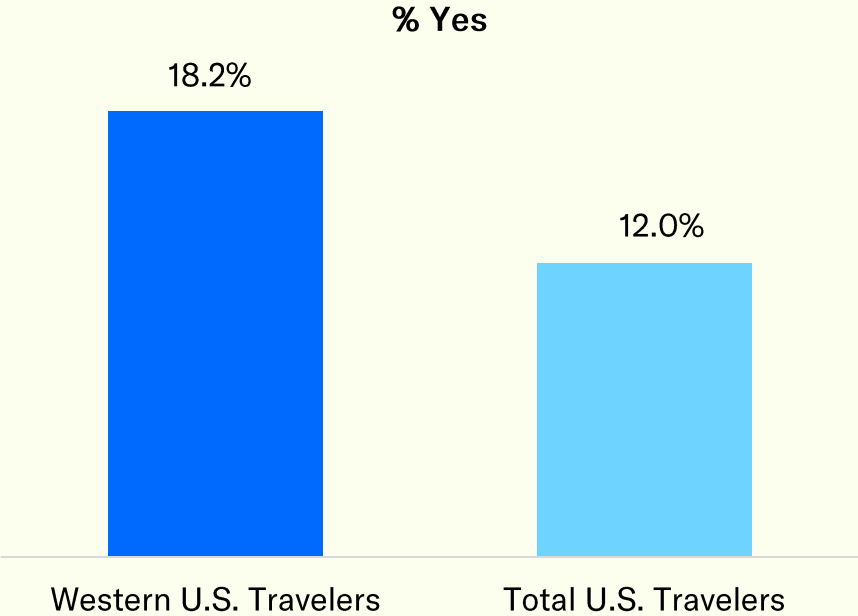
Segment is significantly higher

Question: In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS? (Select all that apply)

Western U.S. travelers are more likely to have used an AI tool for travel planning in the past year.

While relatively low compared to online video, social media, or digital influencers, nearly one in five (18.2%) Western U.S. travelers said they used Artificial Intelligence to plan for a trip in the past year. This was significantly higher than the 12.0 percent of total U.S. travelers who said the same.

% Used Artificial Intelligence
To plan travel in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	26.5%	38.1%	37.0%	45.8%	31.4%
No	69.4%	58.0%	59.6%	50.5%	64.3%
I don't know	4.1%	3.9%	3.4%	3.7%	4.3%
Base	4,698	1,082	1675	1,138	3,887

 Segment is significantly higher

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

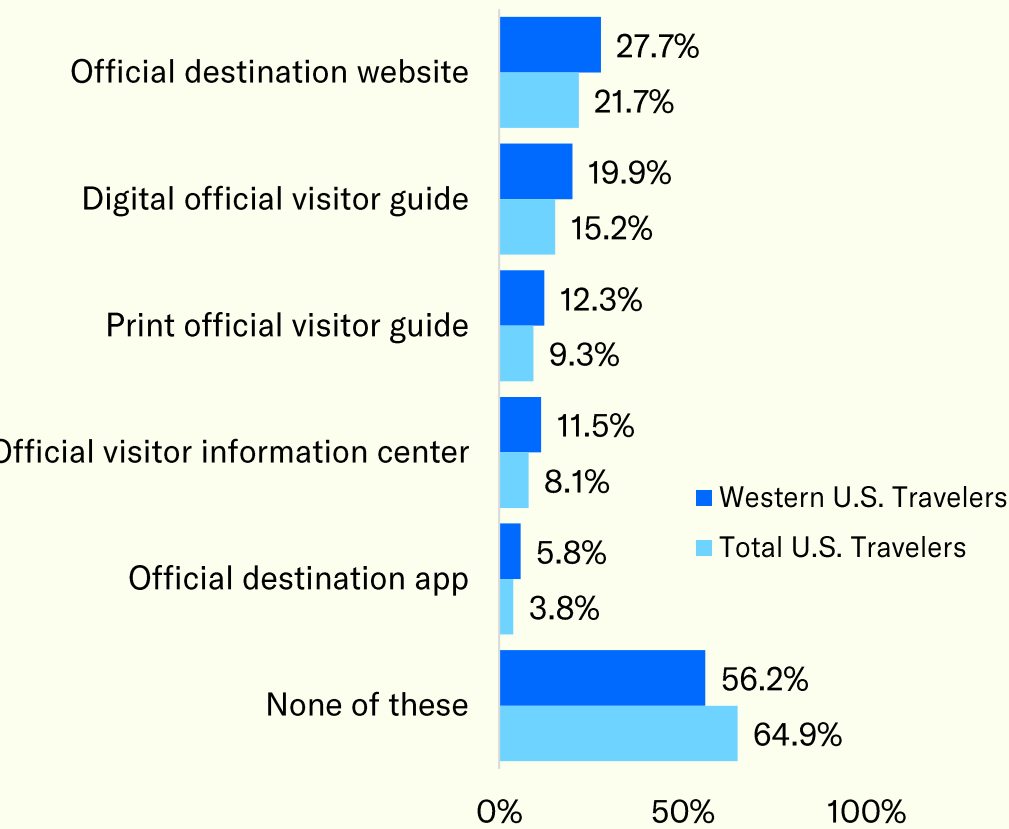
Base: Western U.S. visitors (21,470 completed surveys).

Digital resources, namely destination websites and visitor guides, are the top official DMO resources used by Western U.S. travelers in the past year.

In the past year, less than half (43.8%) of Western U.S. travelers have used any official DMO resource to plan a trip. However, this is higher than total U.S. travelers (35.1%). More than one in four (27.7%) Western U.S. travelers said they used an official destination website, followed by one in five (19.9%) who reported using a digital official visitor guide.

DMO Resources

% used to plan travel in the past 12 months



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Official destination website	35.9%	41.2%	39.9%	49.4%	37.6%
Digital official visitor guide	24.5%	36.7%	29.9%	40.2%	28.9%
Print official visitor guide	14.9%	26.2%	20.7%	27.8%	19.1%
Official visitor information center	14.7%	24.7%	20.8%	28.7%	18.4%
Official destination app	8.7%	14.0%	11.3%	15.6%	10.5%
None of these	48.2%	32.1%	36.3%	24.2%	40.2%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

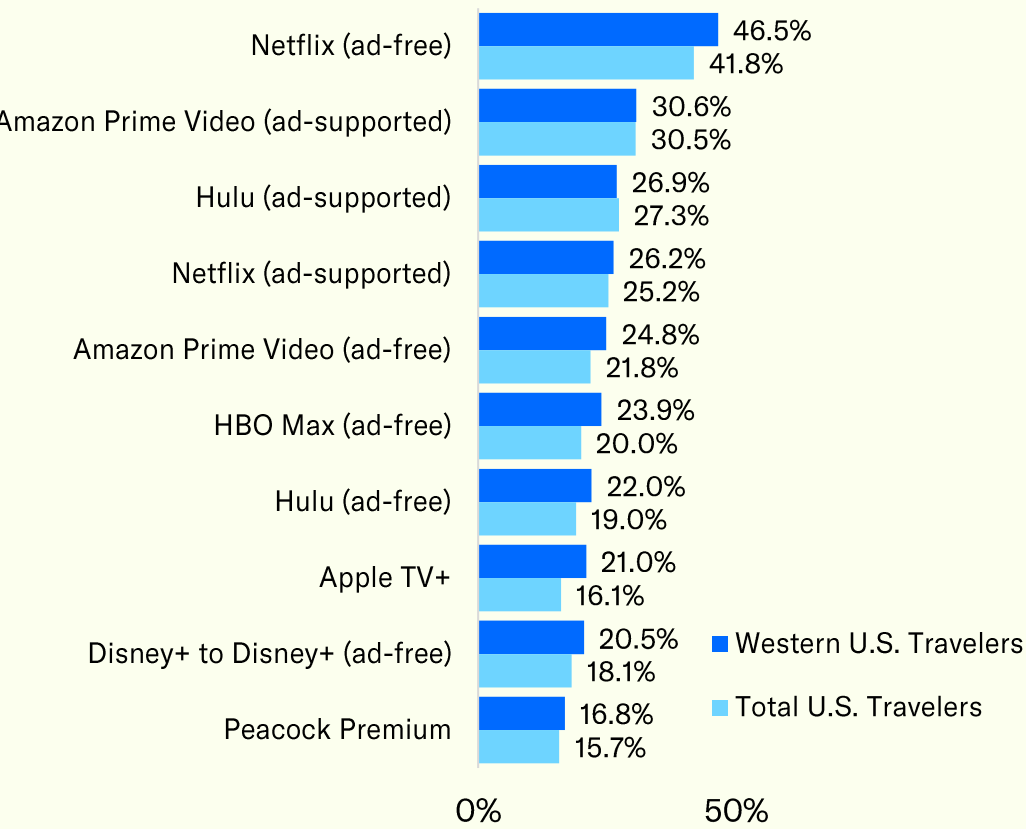
Question: In the PAST TWELVE (12) MONTHS, which resources from destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office have you used to help plan any travel? (Select all that apply) **Base:** Western U.S. visitors (21,470 completed surveys).

Western U.S. travelers are more likely to be watching ad-supported tiers for Amazon Prime and Hulu, but less so for Netflix.

Nearly half of Western U.S. travelers are regularly watching Netflix content without ads (46.5%), followed by three in ten who said they regularly consume Amazon Prime content with ads (30.6%). Compared to total U.S. travelers, they are much more likely to be watching Netflix without ads (+4.7 percentage points).

Top 10 Streaming Services

Regularly consumed



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Netflix (ad-free)	51.3%	51.2%	51.5%	54.4%	50.3%
Amazon Prime Video (ad-supported)	31.0%	33.7%	38.6%	32.7%	29.8%
Hulu (ad-supported)	28.7%	28.5%	27.1%	26.9%	26.8%
Netflix (ad-supported)	29.1%	34.3%	32.2%	35.6%	30.6%
Amazon Prime Video (ad-free)	29.2%	28.5%	35.2%	31.4%	27.4%
HBO Max (ad-free)	28.5%	29.1%	28.3%	31.6%	26.4%
Hulu (ad-free)	26.1%	28.8%	29.3%	32.4%	26.8%
Apple TV+	27.1%	27.9%	27.7%	33.0%	27.6%
Disney+ to Disney+ (ad-free)	23.8%	24.8%	30.1%	28.9%	22.3%
Peacock Premium	19.6%	19.7%	21.7%	21.6%	18.8%
Base	7,344	1,784	3185	2,017	5,948

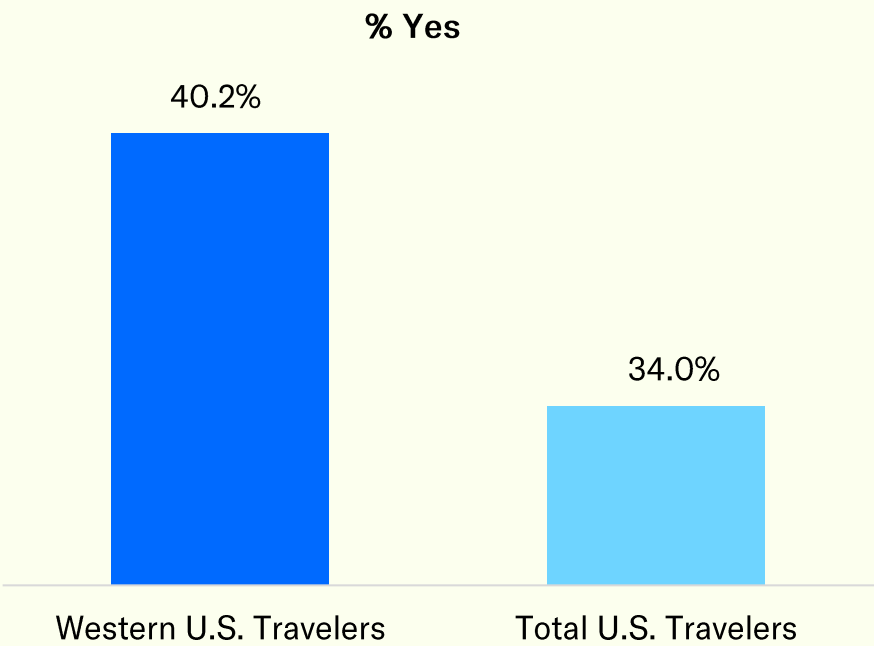
Segment is significantly higher

Question: To which of these streaming services do you currently subscribe or regularly watch? (Select all that apply)

Four in ten Western U.S. travelers regularly tune into podcasts.

At 40.2 percent, Western U.S. travelers are much more likely than total U.S. travelers (34.0%) to say they listen to podcasts regularly.

% Listen to Podcasts Regularly



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Yes	48.9%	54.9%	52.3%	61.0%	51.5%
No	51.1%	45.1%	47.7%	39.0%	48.5%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

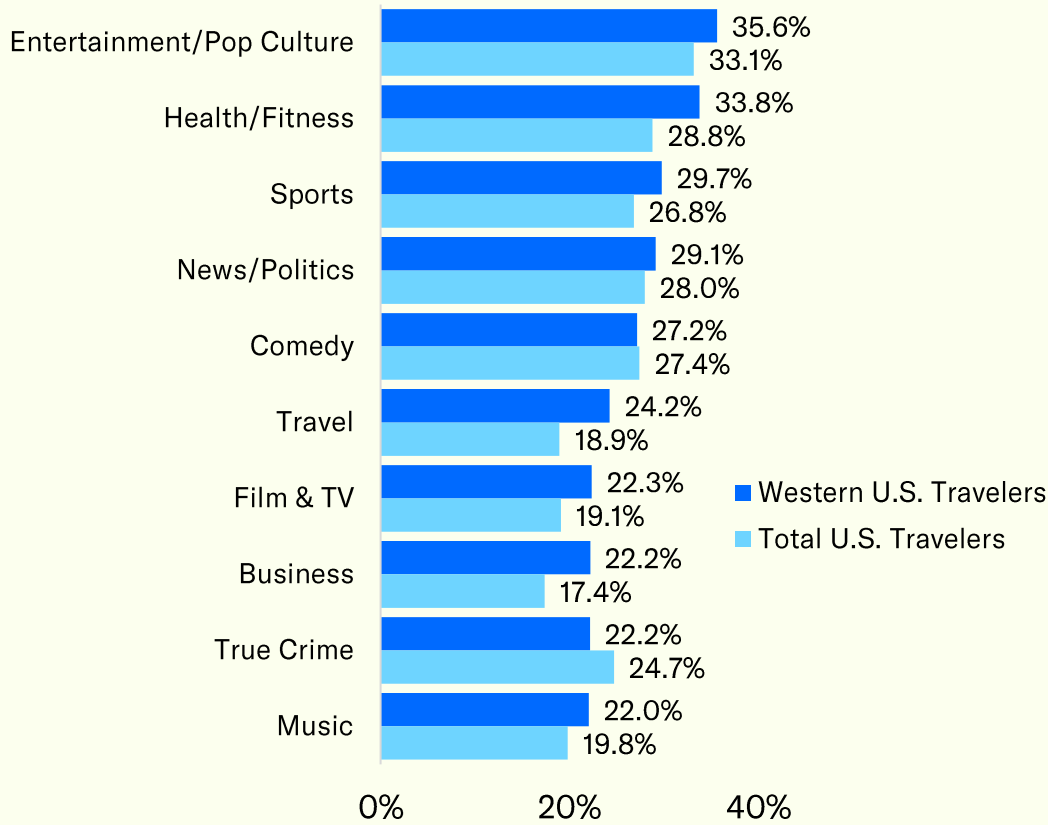
Question: Do you listen to any podcasts on a regular basis?

Base: Western U.S. visitors (21,470 completed surveys).

Entertainment tops their podcast genre list, but Western U.S. travelers are more likely to be consuming travel, health/fitness, business or tech podcasts than the average American traveler.

Among Western U.S. travelers who are podcast listeners, their top podcast genres are entertainment/pop culture (35.6%), followed by health/fitness (33.8%) and sports (29.7%). Compared to total U.S. travelers, they are most significantly more likely to be tuning into travel (+5.3 percentage points), health/fitness (+5.0 percentage points), business (+4.8 percentage points), or technology (+4.7 percentage points) podcasts.

Top 10 Podcast Genres



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
Entertainment/Pop Culture	40.6%	39.2%	43.4%	44.4%	40.2%
Health/Fitness	41.5%	48.8%	48.0%	53.1%	42.9%
Sports	35.0%	35.3%	35.7%	43.1%	33.3%
News/Politics	29.9%	28.9%	30.4%	31.3%	29.7%
Comedy	28.3%	31.9%	27.3%	33.9%	27.0%
Travel	28.6%	34.8%	34.8%	40.1%	29.8%
Film & TV	26.9%	30.4%	30.9%	33.0%	28.0%
Business	28.2%	31.2%	30.2%	37.0%	28.5%
True Crime	21.4%	23.6%	21.1%	22.8%	21.6%
Music	25.2%	29.6%	31.3%	37.2%	26.8%
Base	3,370	940	1571	1,191	2,916

Segment is significantly higher

Question: What podcast genres do you listen to on a regular basis? (Select all that apply)

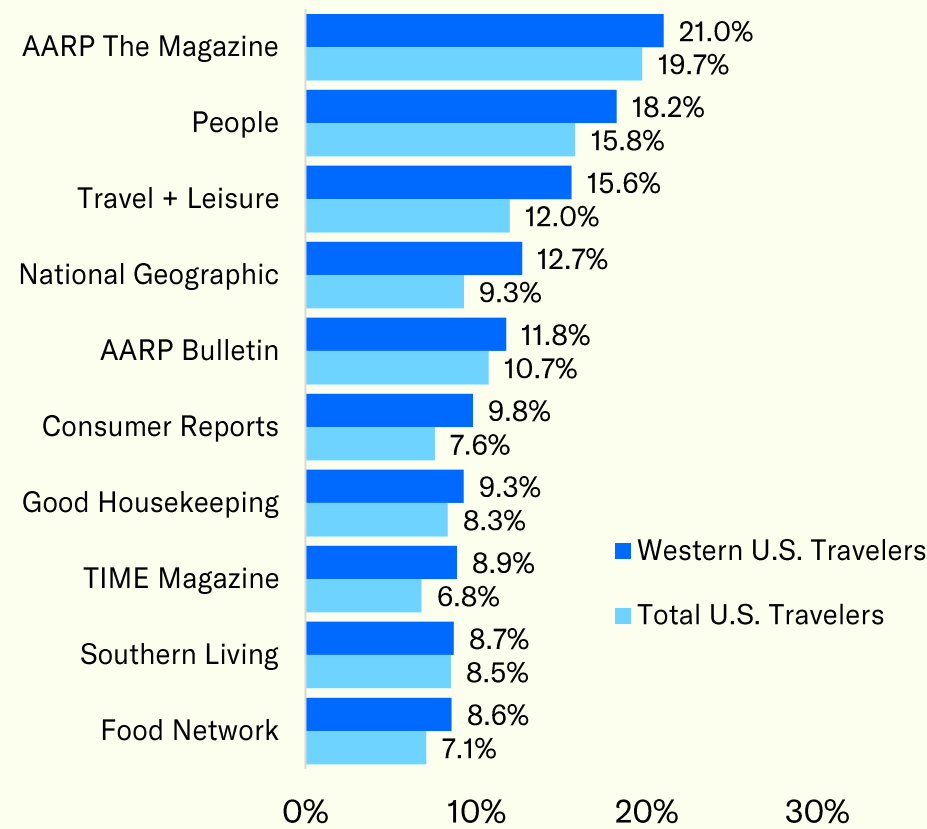
Base: Western U.S. visitors (8,061 completed surveys).

Two-thirds of Western U.S. travelers have read any magazine content in the past year, compared to less than four in ten total U.S. travelers.

Western U.S. travelers were most likely to have read *AARP The Magazine* (21.0%), *People* (18.2%), *Travel + Leisure* (15.6%), or *National Geographic* (12.7%). Compared to total U.S. travelers, they are most significantly more likely to have read *Travel + Leisure* (+3.6 percentage points) or *National Geographic* (+3.4 percentage points) in the past year.

Top 10 Magazines

Used in the past 12 months (print or online)



By Segment

	City Trippers	Mountain Seekers	Beach Goers	Park Enthusiasts	Wine Aficionados
AARP The Magazine	22.2%	22.4%	20.9%	22.4%	22.8%
People	21.7%	25.4%	24.3%	28.8%	24.8%
Travel + Leisure	19.3%	19.6%	20.6%	22.9%	19.9%
National Geographic	15.7%	21.1%	16.6%	24.5%	18.6%
AARP Bulletin	12.1%	13.2%	12.4%	14.4%	12.9%
Consumer Reports	11.6%	16.8%	13.1%	14.7%	14.2%
Good Housekeeping	11.2%	17.9%	13.9%	16.6%	13.7%
TIME Magazine	11.3%	13.8%	12.1%	14.8%	12.0%
Southern Living	11.2%	17.1%	12.0%	15.7%	12.6%
Food Network	10.8%	13.7%	11.8%	16.0%	11.9%
Base	7,344	1,784	3185	2,017	5,948

Segment is significantly higher

Question: Which of these MAGAZINES (PRINTED OR ONLINE) have you read or paged through in the past TWELVE (12) MONTHS? (Select all that apply)

Base: Western U.S. visitors (21,470 completed surveys).

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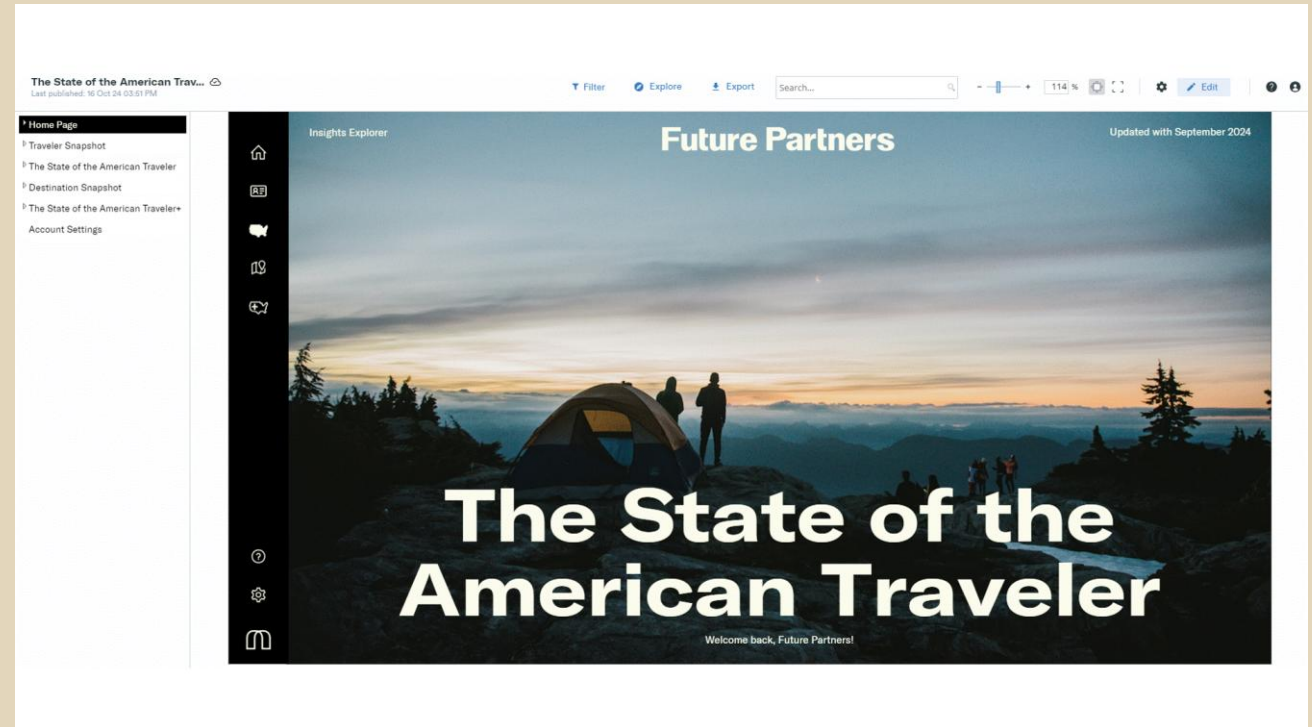
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- United Kingdom

Marketing Considerations: Use of Destination Marketing Organization Digital Content

Over **one in four** international travelers would use **Destination Marketing Organization (DMO) websites** to plan their trip, while under **one in five** would use **DMO social media content**.

Digital content from official destination marketing organizations (DMO) continues to be an important resource for international travelers, with 28.0 percent of the aggregate saying they would use a DMO's website and 18.0 percent saying they would use a DMO's social media. A third or more of international travelers from Colombia (37.6%), Spain (37.0%), China (36.1%), India (33.5%), and Argentina (33.0%) would use DMO websites as a planning resource. The top markets who would use DMO social media are India (26.3%), Colombia (26.0%), China (25.4%), Japan (23.4%), Argentina (20.8%), Brazil (20.8%), Spain (19.9%), Mexico (19.6%), Canada (15.4%), France (14.6%), Italy (14.3%), Germany (13.8%), Australia (13.6%), South Korea (12.9%), U.K. (12.5%), and Netherlands (8.4%).

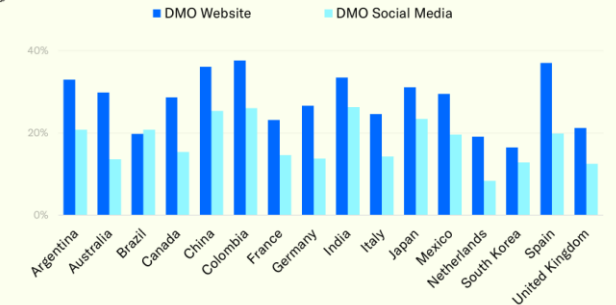
Use of DMO Websites
(% of who would use for planning)

Colombia	37.6%
Spain	37.0%
China	36.1%
India	33.5%
Argentina	33.0%
Japan	31.1%
Australia	29.9%
Mexico	29.5%
Canada	28.6%
Germany	26.6%
Italy	24.6%
France	23.1%
U.K.	21.3%
Brazil	19.8%
Netherlands	19.1%
South Korea	16.5%

Use of DMO Social Media
(% who would use this for planning)

India	26.3%
Colombia	26.0%
China	25.4%
Japan	23.4%
Argentina	20.8%
Brazil	20.8%
Spain	19.9%
Mexico	19.6%
Canada	15.4%
France	14.6%
Italy	14.3%
Germany	13.8%
Australia	13.6%
South Korea	12.9%
U.K.	12.5%
Netherlands	8.4%

Use of DMO Online Content for International Travel Planning



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For more information reach out to Jennifer@FuturePartners.com

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