

Future Partners



June 2025

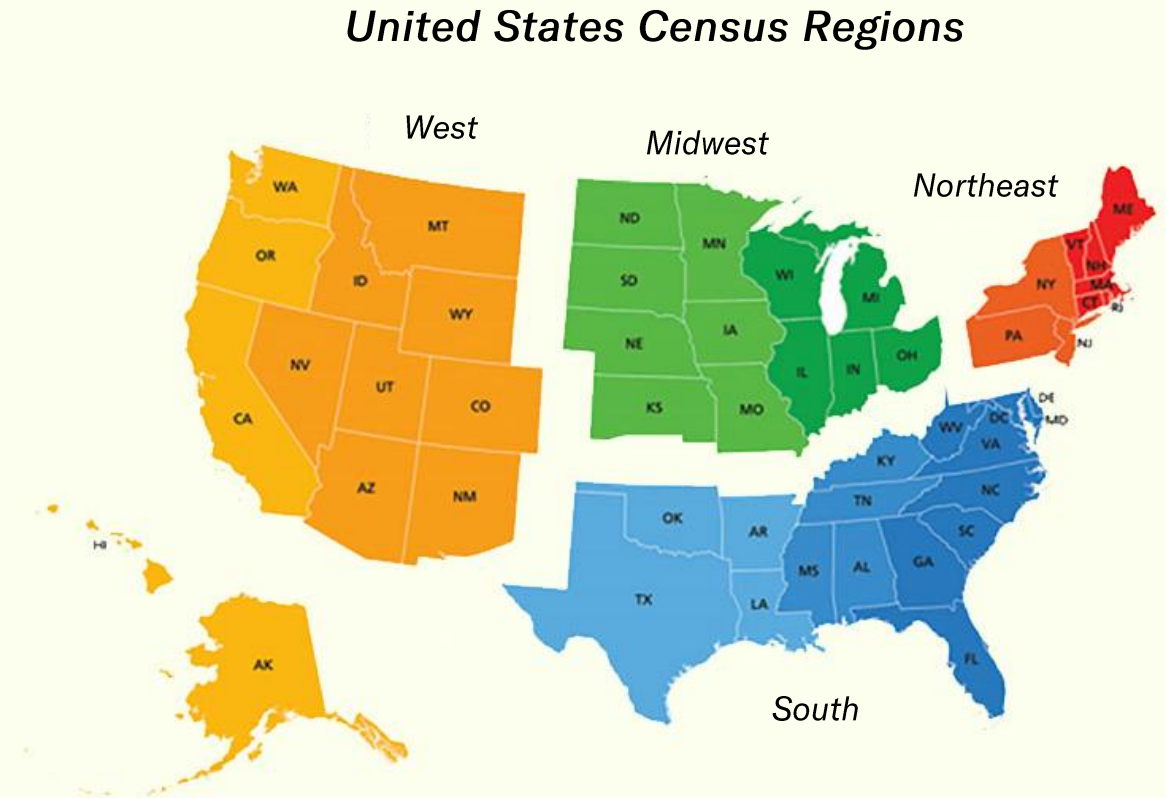
The State of the American Traveler

We're a creative insights firm shaping strategies that capture hearts, minds, and *market share*.

Future Partners

Methodology

- *Monthly tracking survey*
- *Representative sample of adult American travelers in each of four U.S. regions*
- *Tracks traveler sentiment to generate insights into domestic travel trends*
- *4,000+ fully completed surveys collected each wave.*
- *Survey collected [May 16-27](#)*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



Today

- **Travel Sentiment Overview**
- **The Recession-proof Traveler**
- **America 250 Panel**

An aerial night photograph of a city, likely New York City, showing a dense network of glowing yellow and orange lights from buildings and streets. The city is set against a dark blue sky with wispy white clouds. The text is overlaid on the upper left portion of the image.

**Presentation deck and
recording will be available on
our website:**

FuturePartners.com

Traveler Sentiment



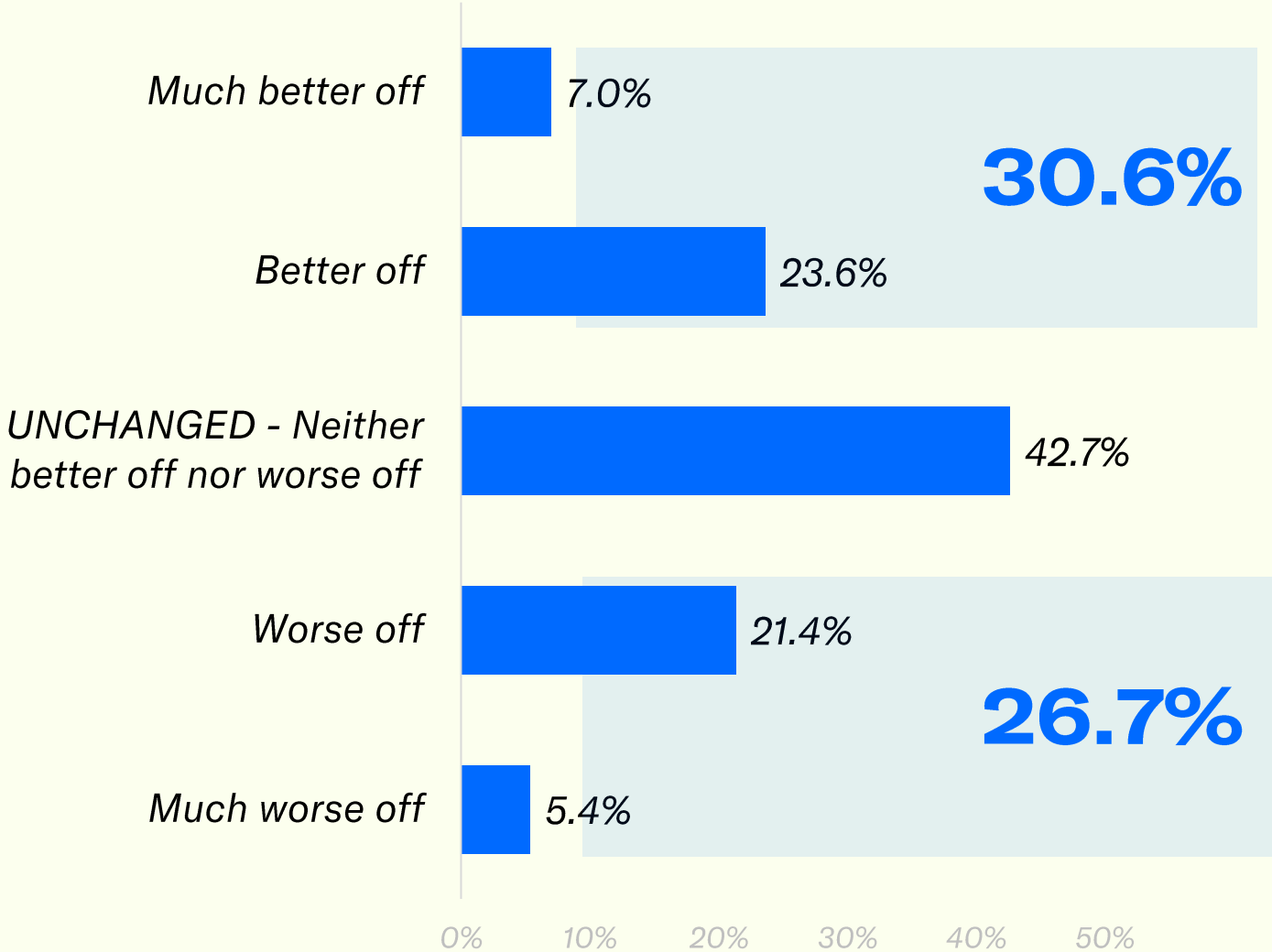
The Data Narrative in Brief:

- **Traveler financial sentiment remains mostly stable, as do travel budgets.**
- **Americans still report being excited to get out and travel, but they've reduced their travel expectations.**
- **Expectations for travel abroad are dropping after strong growth earlier in the year.**
- **Expectations that the US economy will fall into a recession this year declined last month, but still remains quite high.**
- **We are seeing strong signs travelers are changing travel and spending behaviors in response.**

No Change This Month in How Travelers See Their Current Financial Situation.

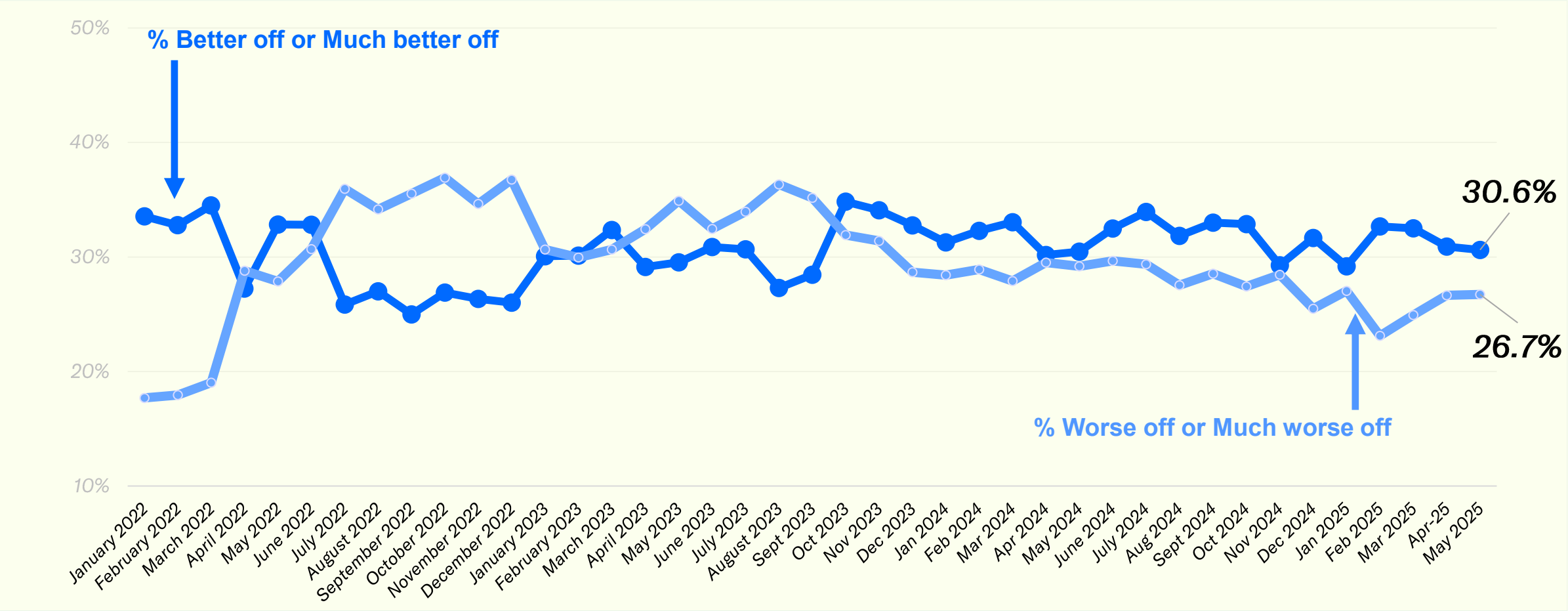
Question:

Would you say that you (and your household) are better off or worse off financially than you were a year ago?



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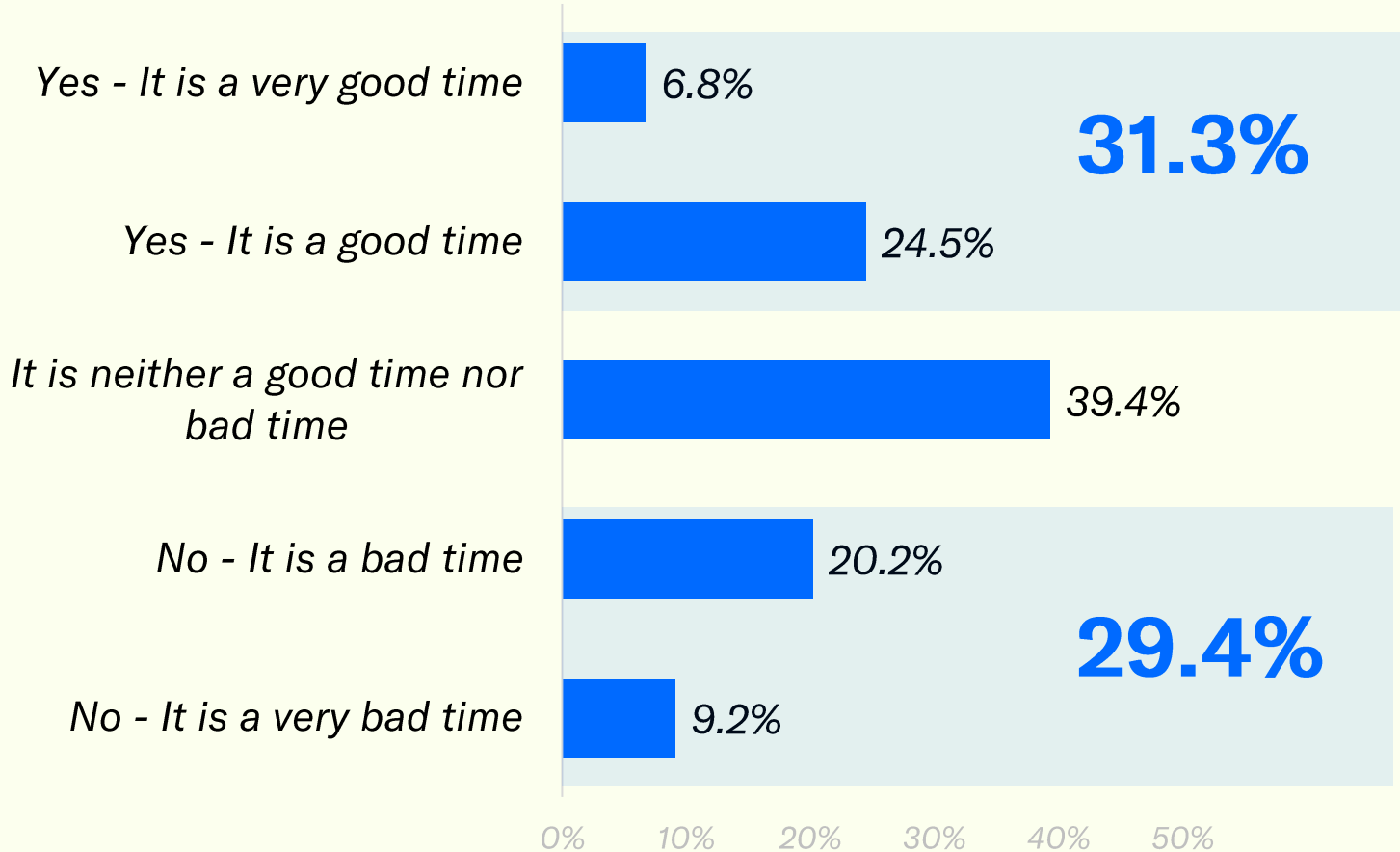
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Confidence that now is a good time to spend on leisure travel rebounded slightly.

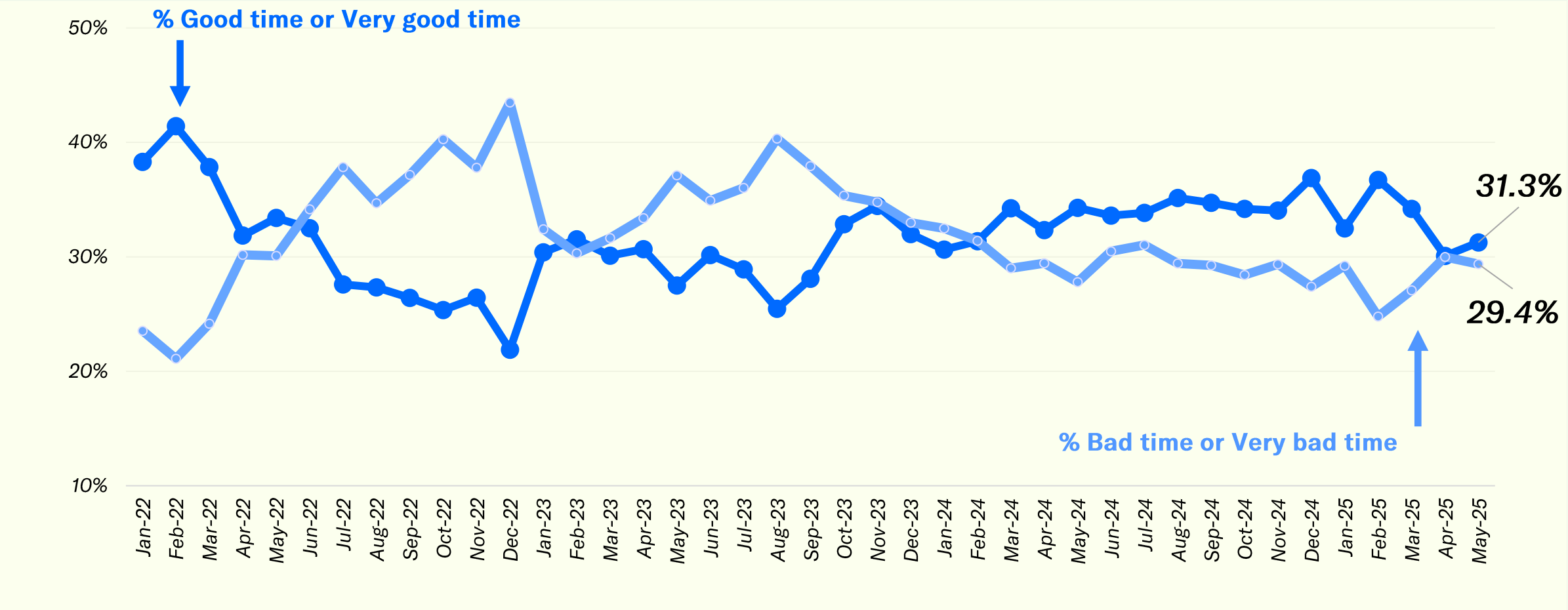
Question:

Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



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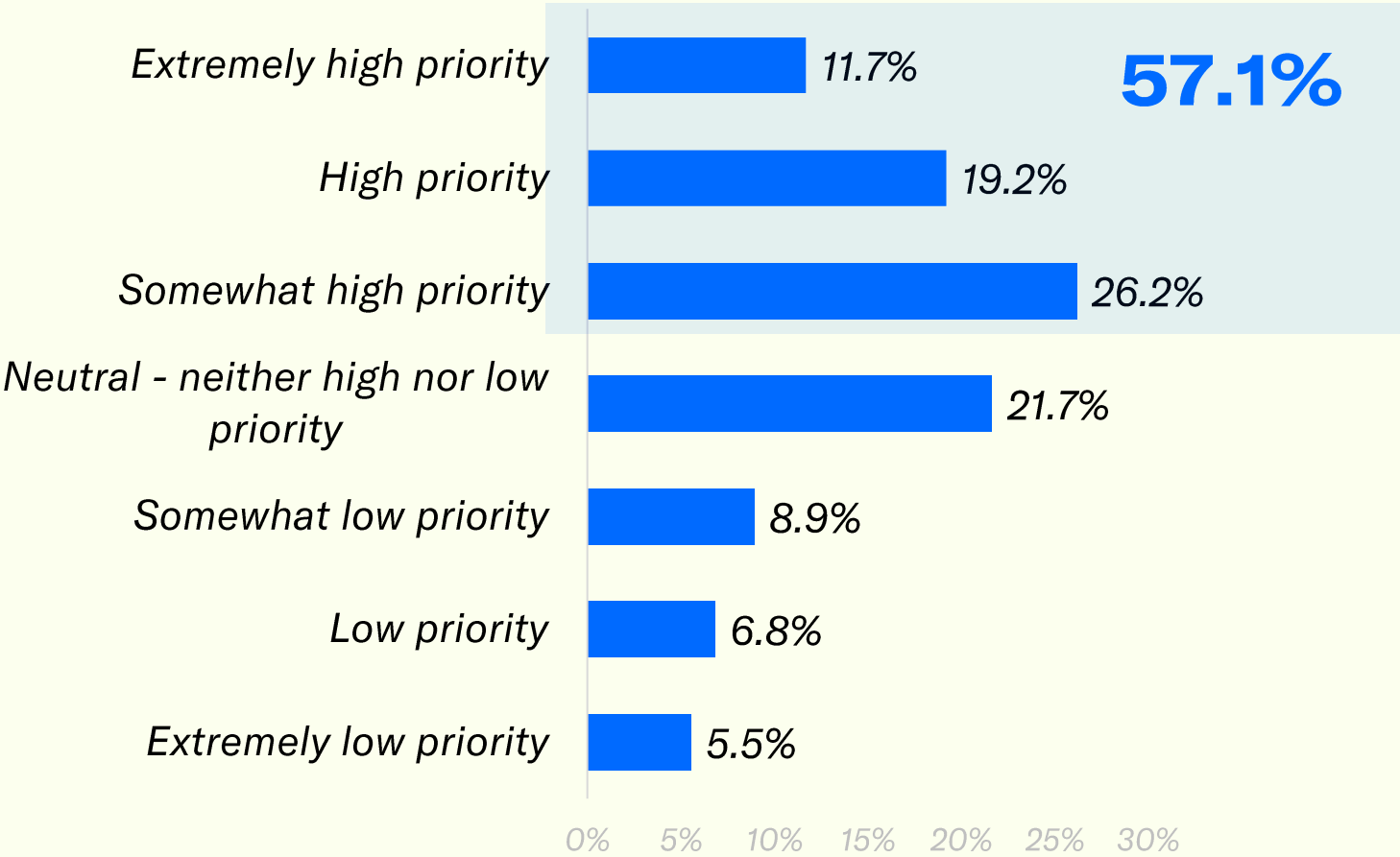


Americans' intent to make travel a budget priority in the near-term future dipped.

Question:

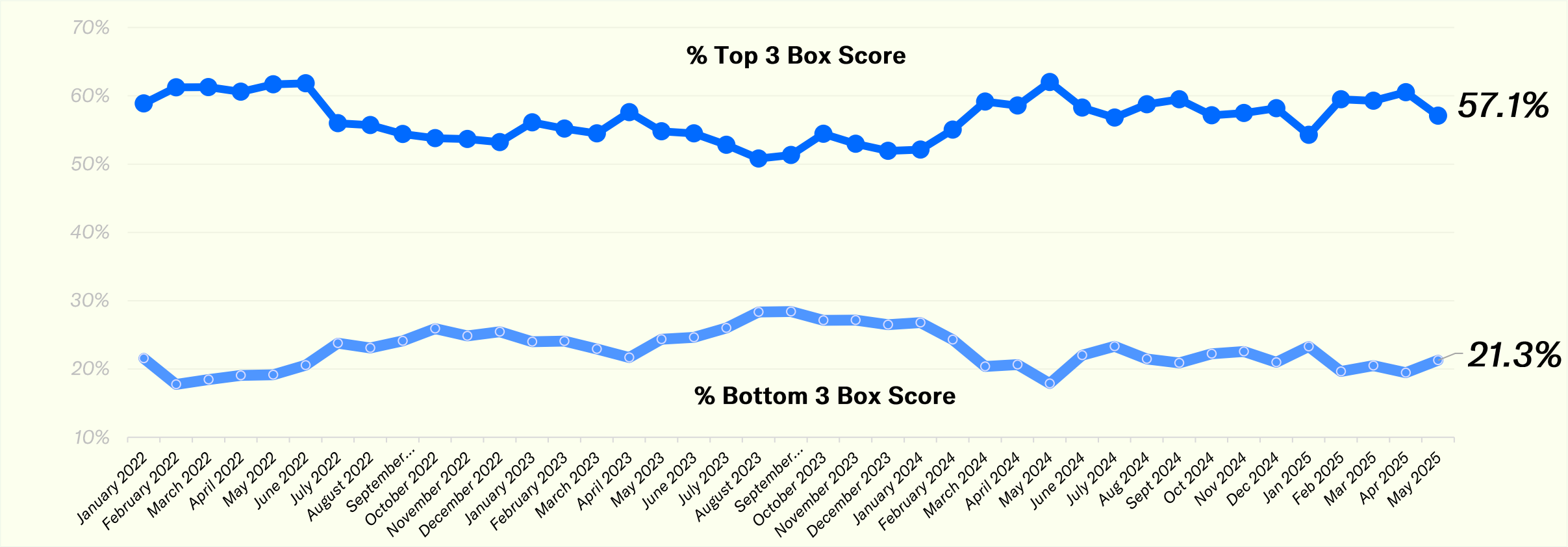
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.



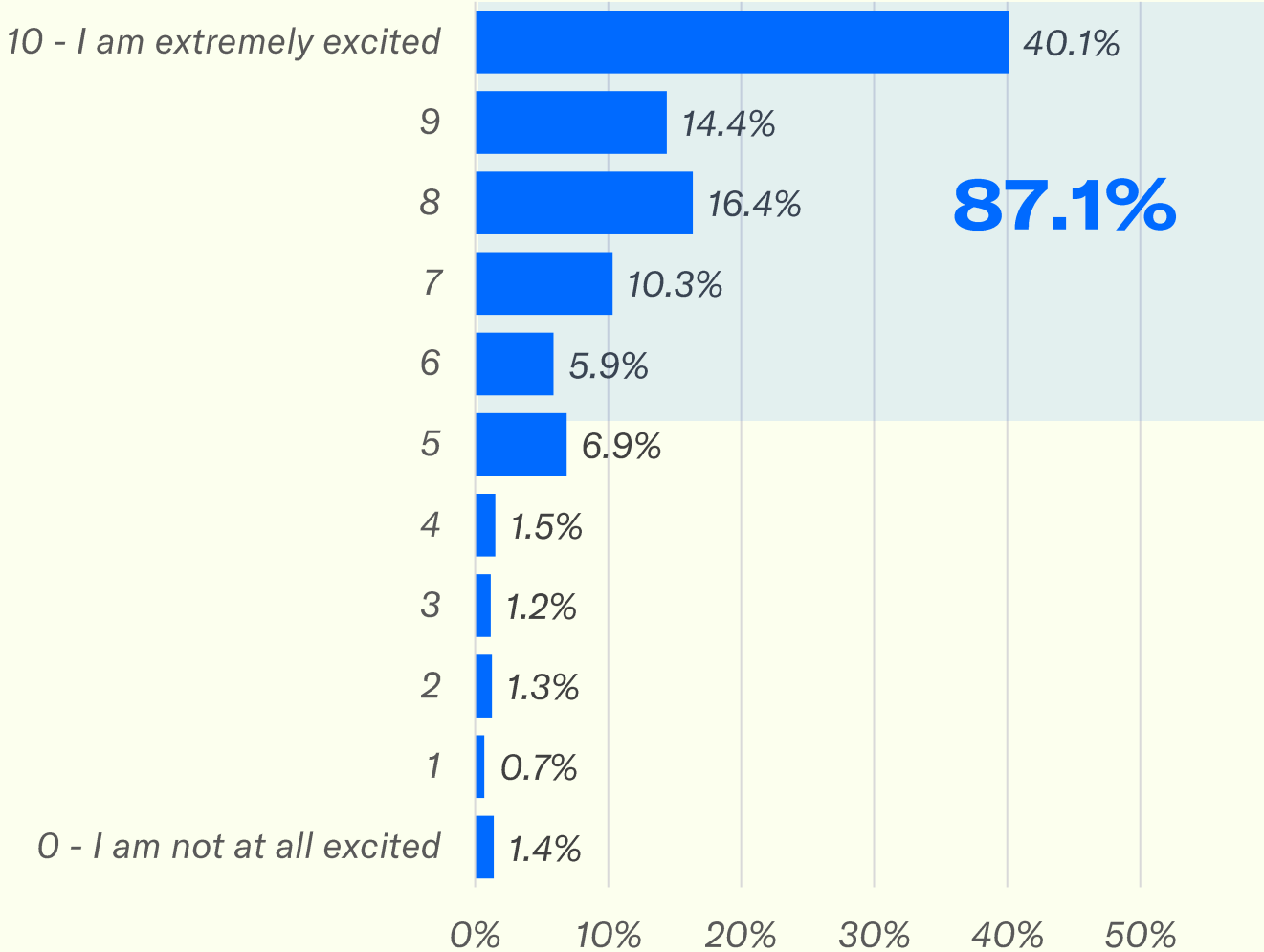
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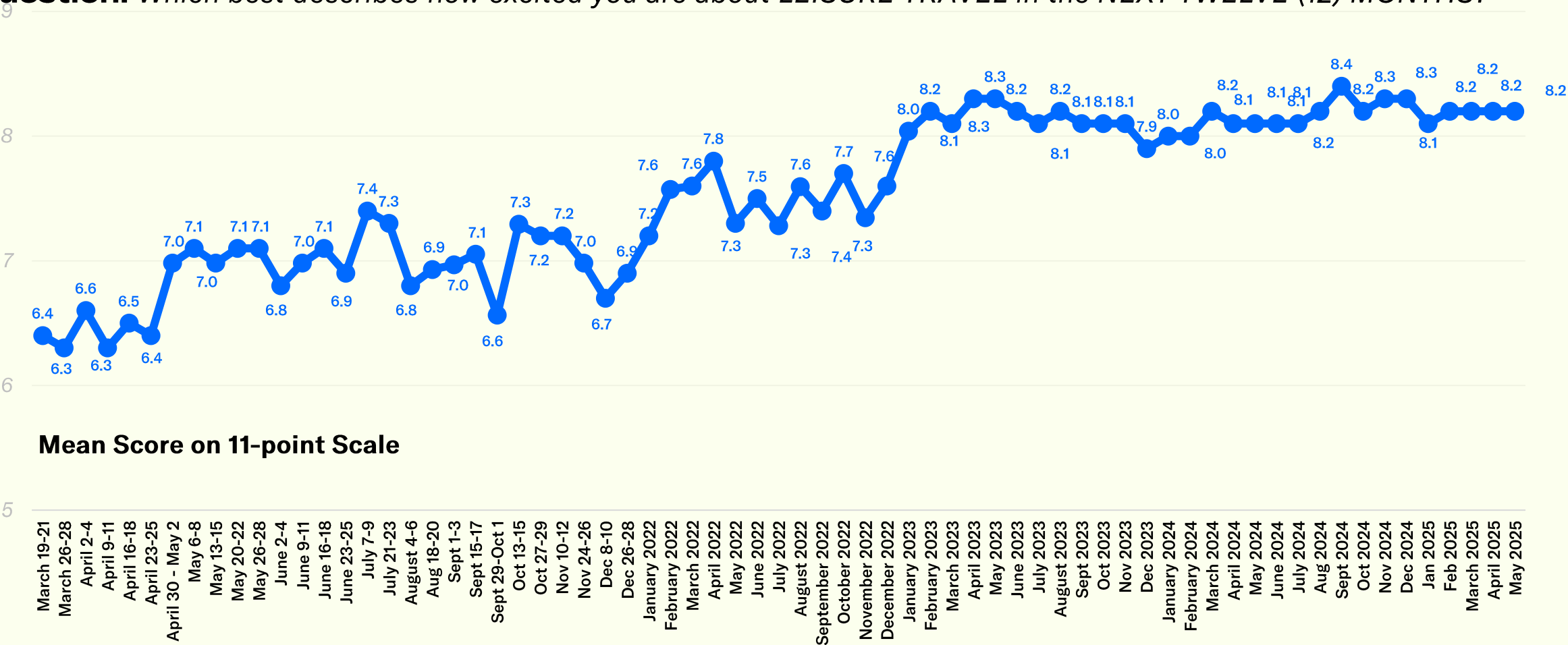
Traveler Excitement Remains High: 87% Report Elevated Interest in Travel.

Question:
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



Traveler Excitement Remains High: 87% Report Elevated Interest in Travel.

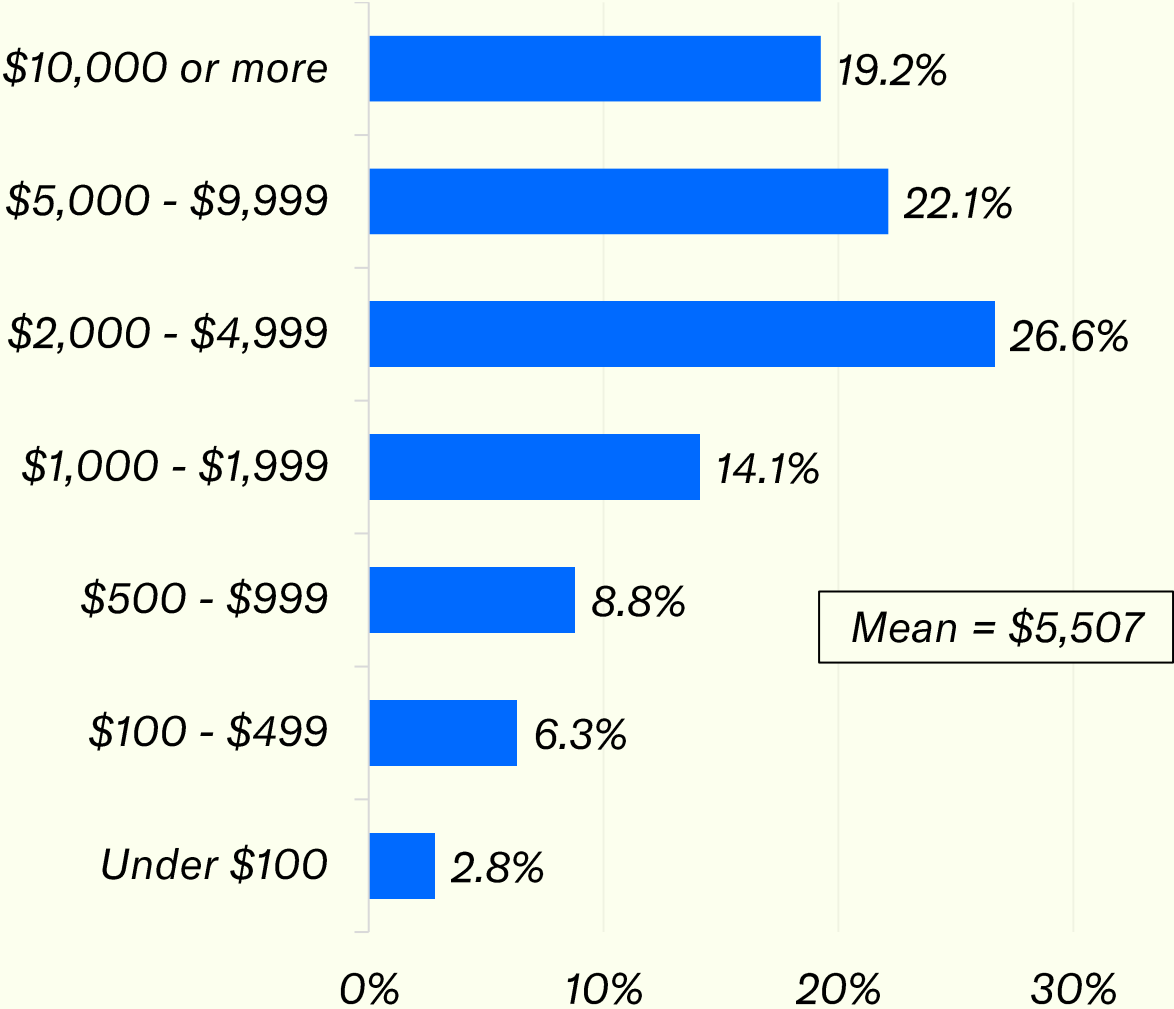
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Projected Travel Budgets Remain Strong with Modest Growth in May.

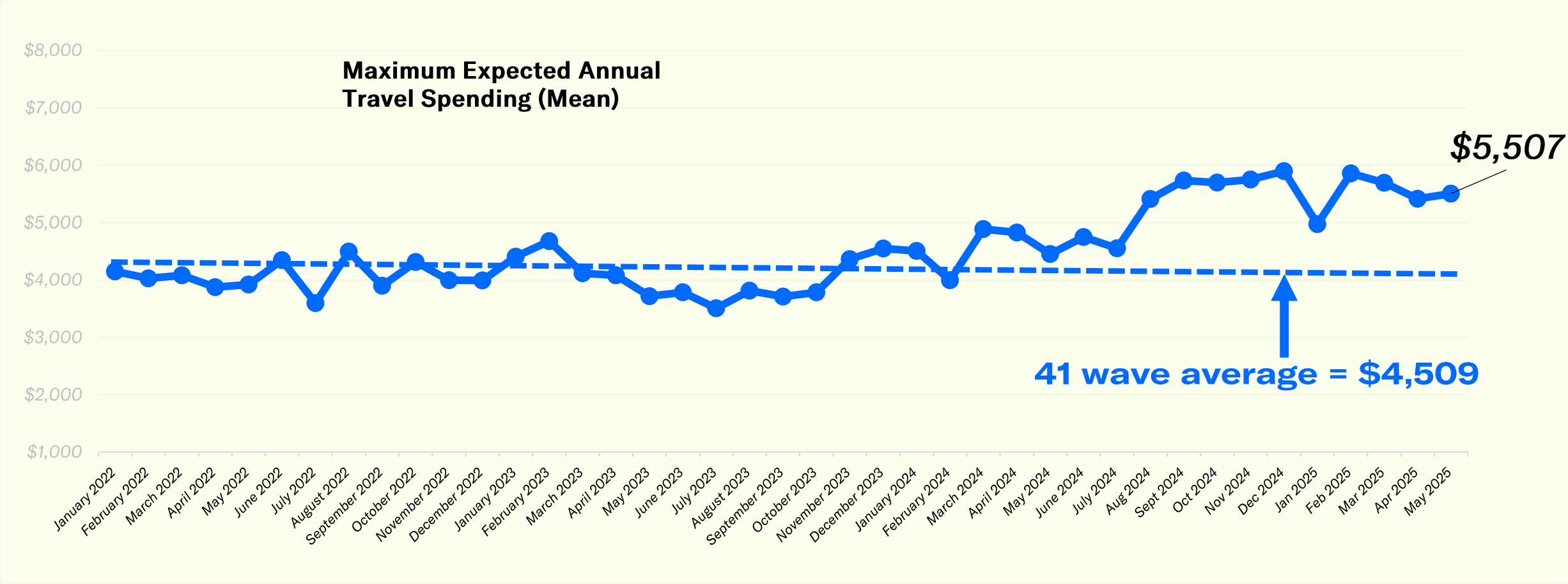
Question:

How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?



Projected Travel Budgets Remain Strong with Modest Growth in May.

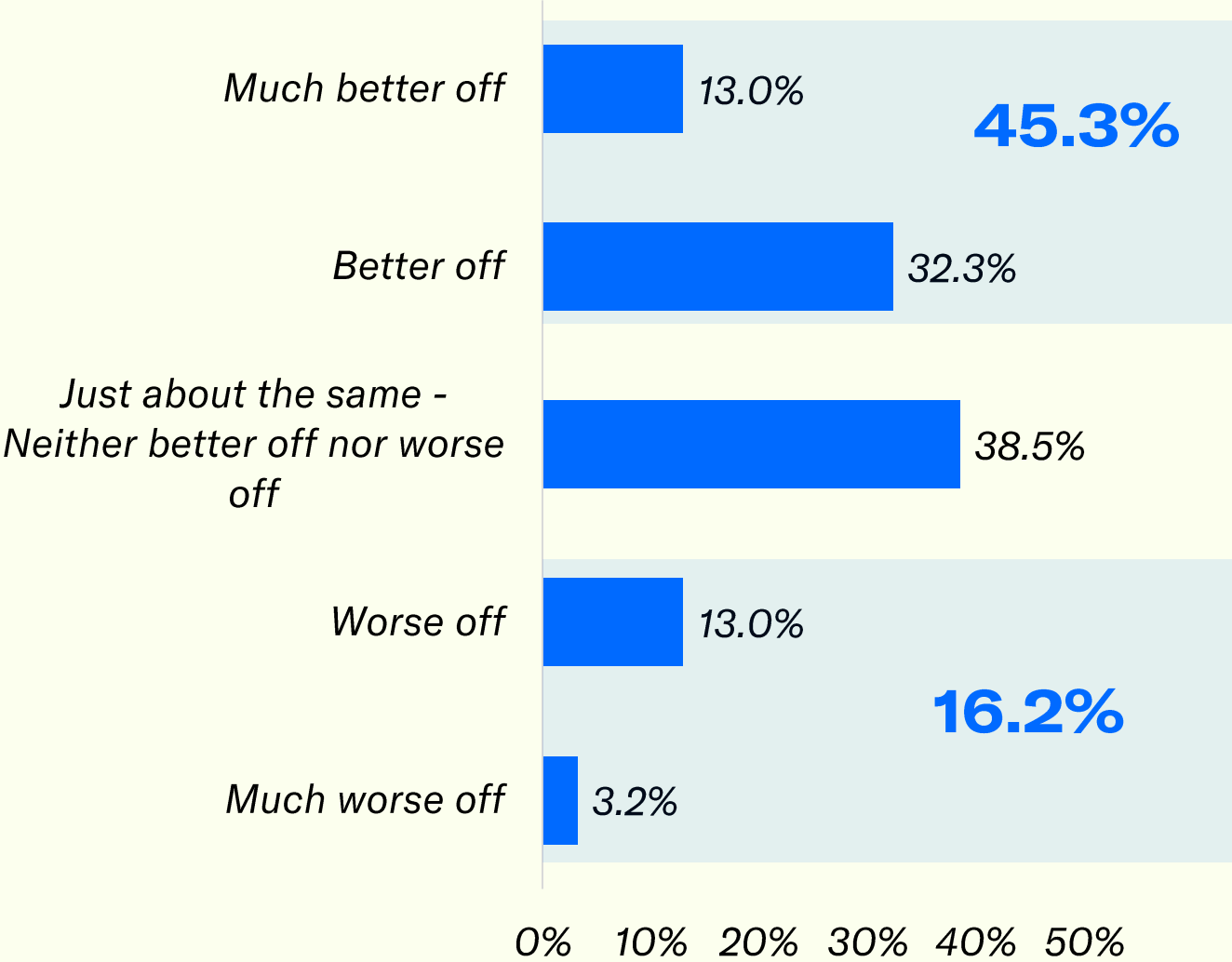
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Travelers Report Improved Confidence in Their Financial Future.

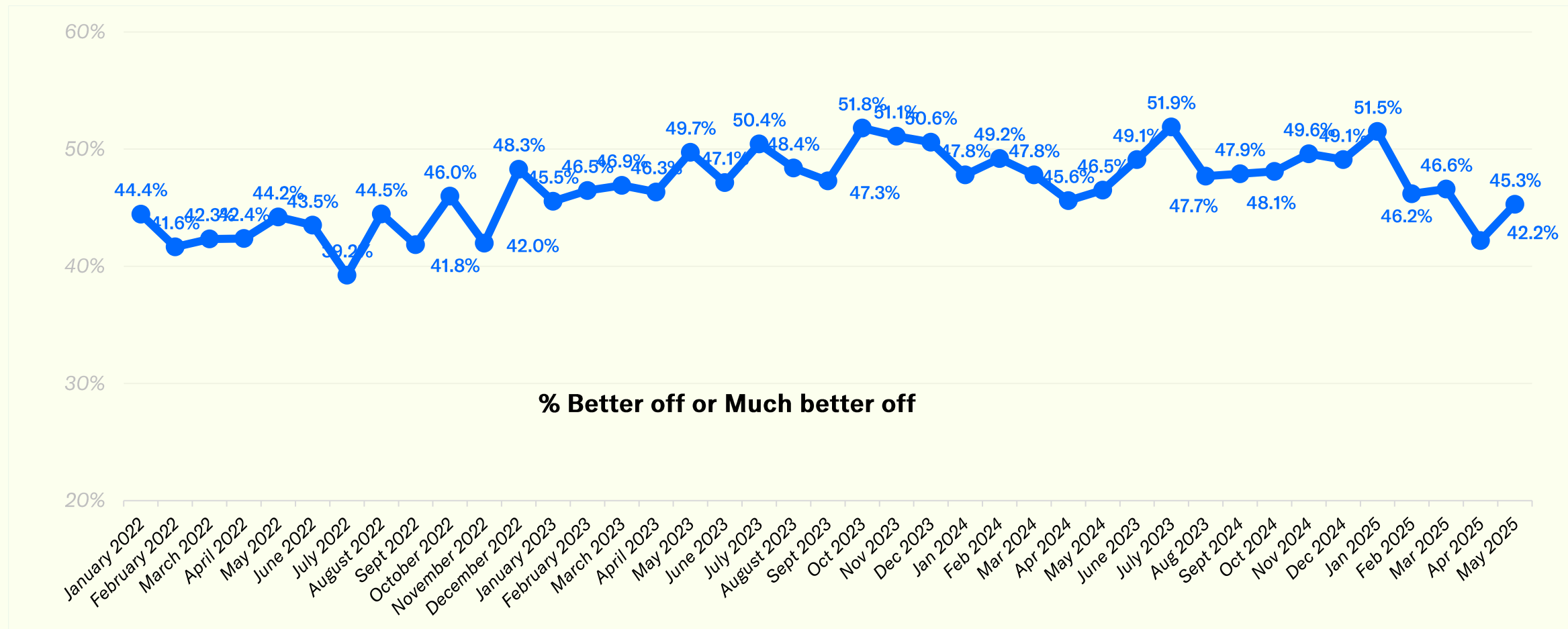
Question:

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?



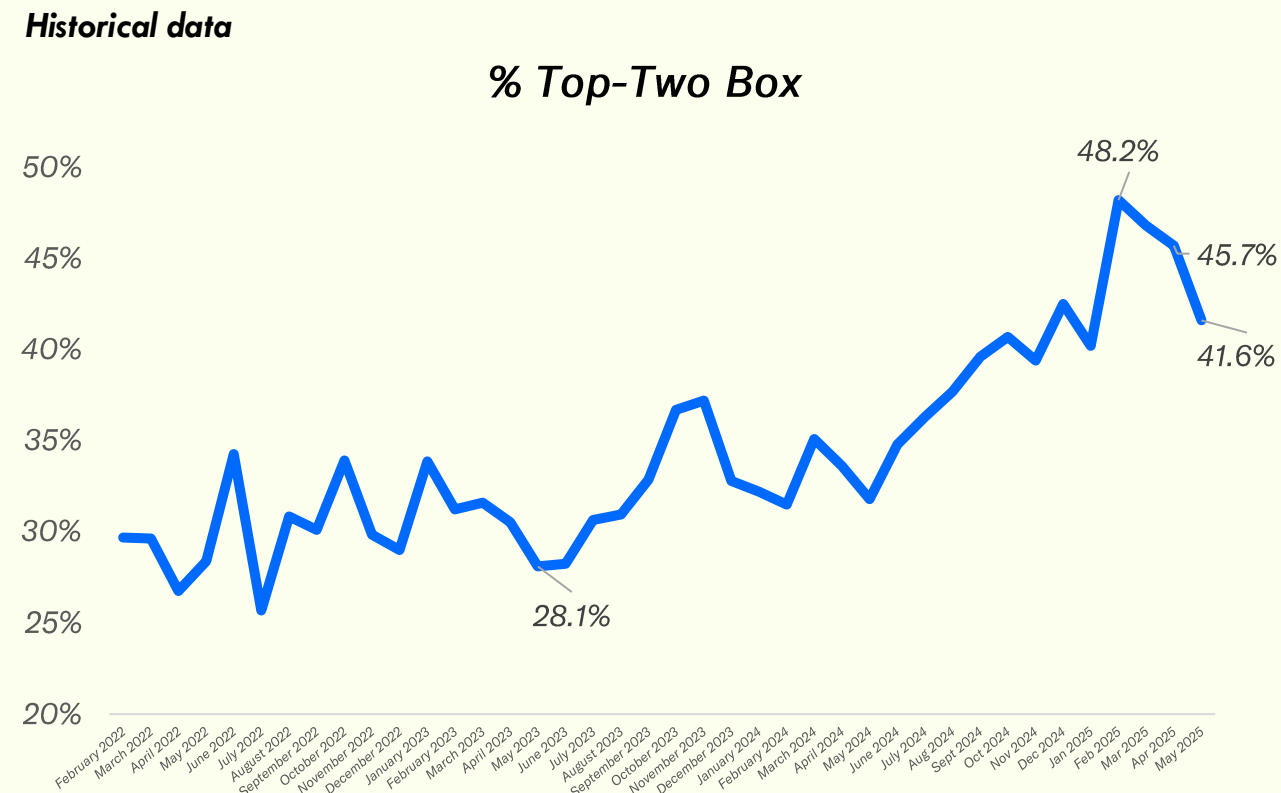
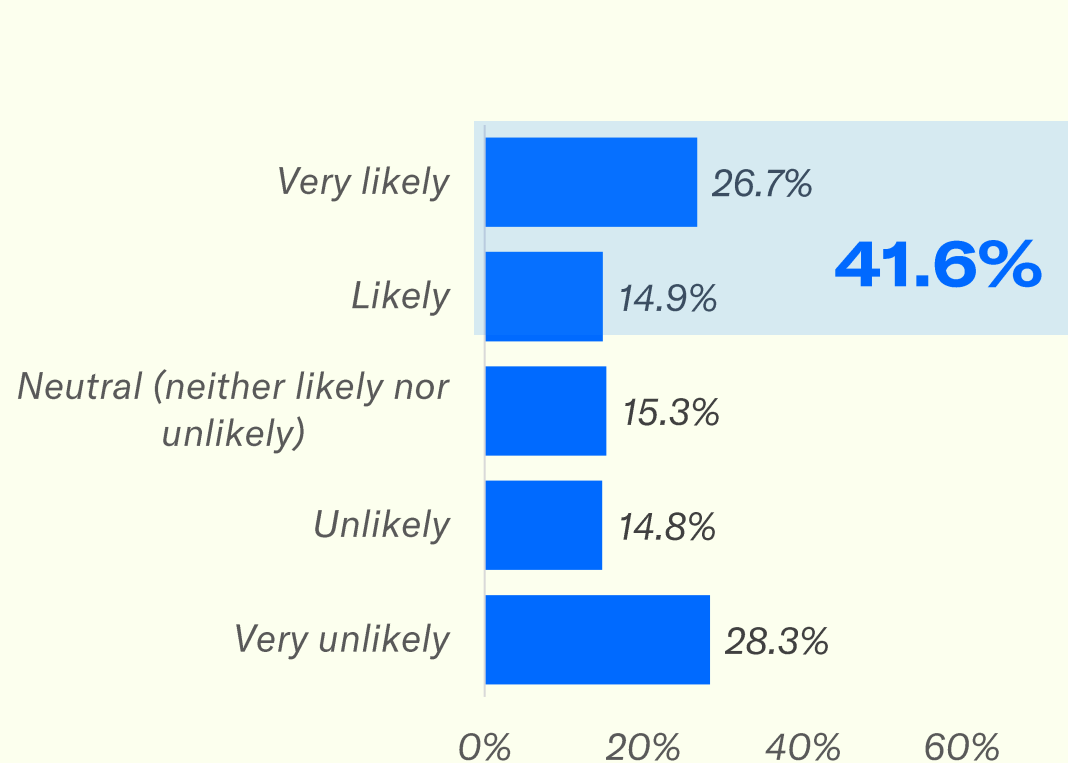
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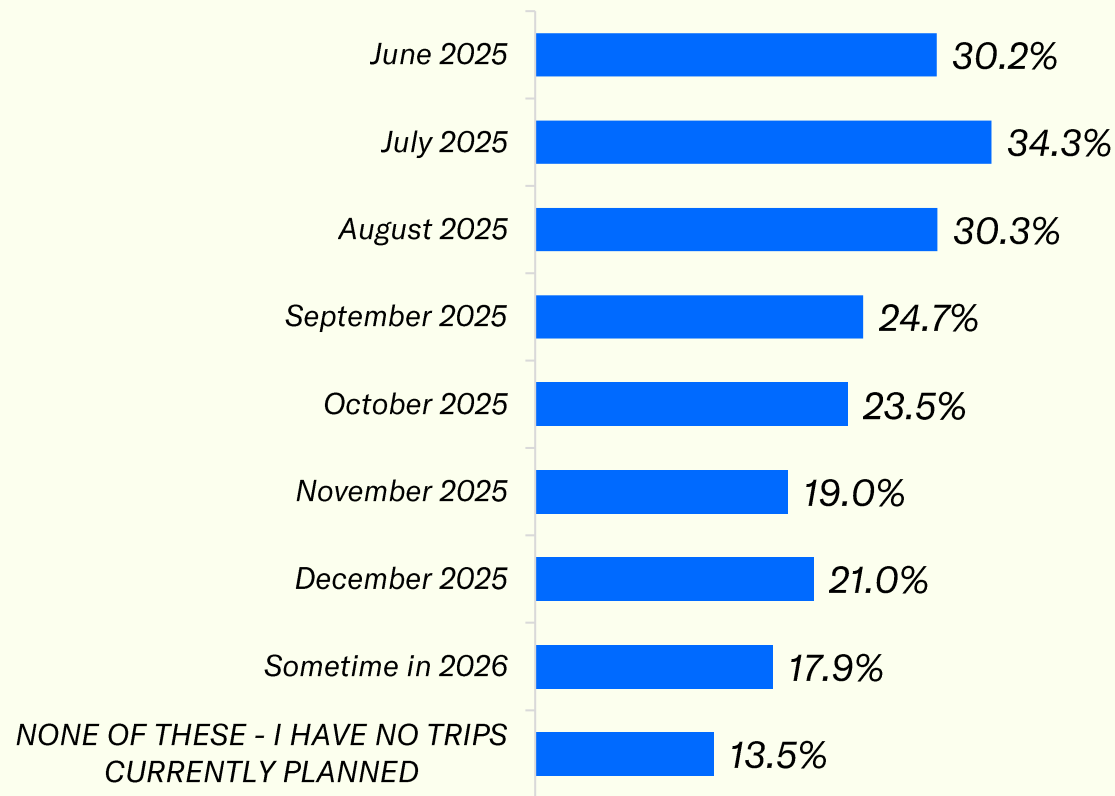
Momentum Stalls: Growth in International Travel Expectations Slows Again.

Question: *How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?*



Nearly 87 percent of travelers have at least one trip on the books right now.

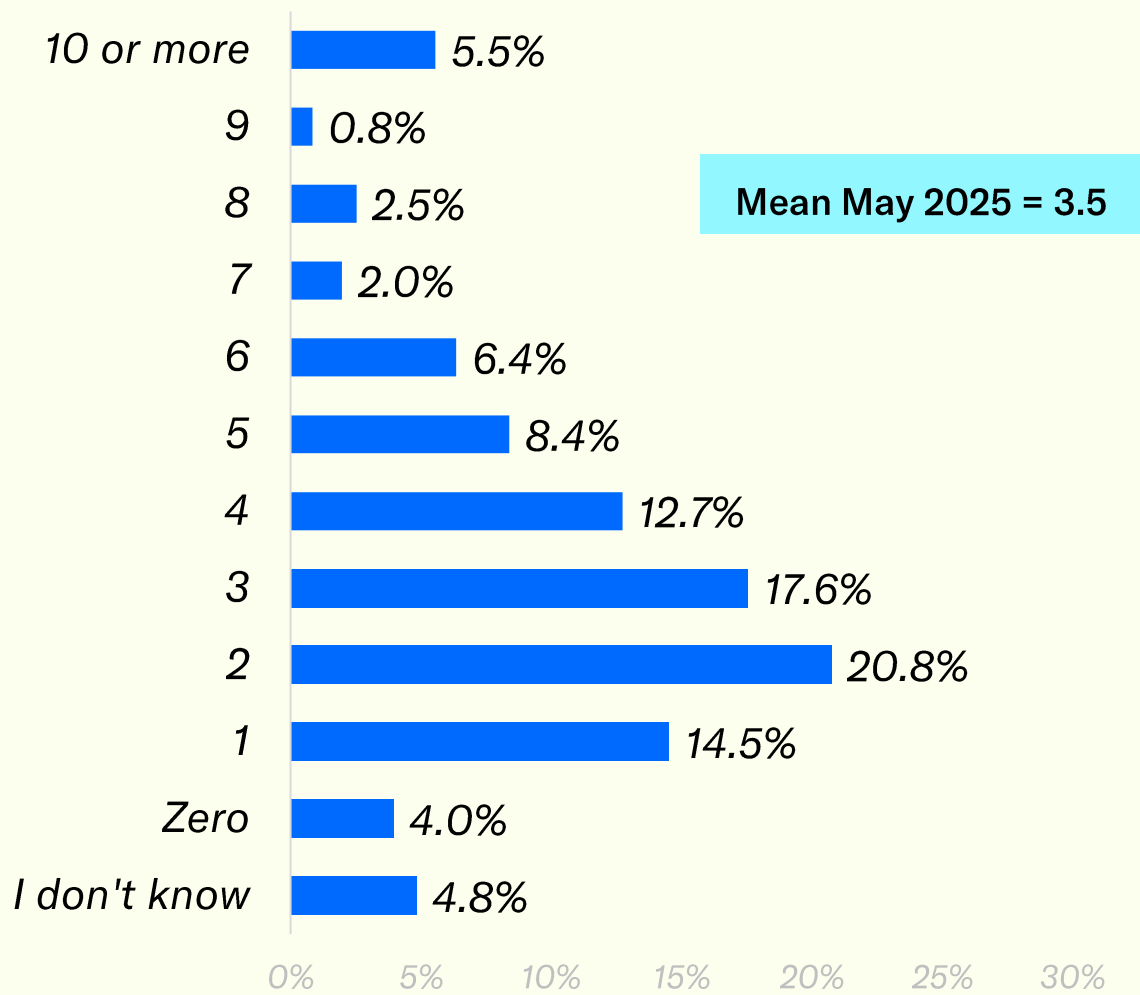
Question: *In which months do you currently have any leisure trips planned (even if only tentatively)?*



86.5%
have at least one trip
currently planned

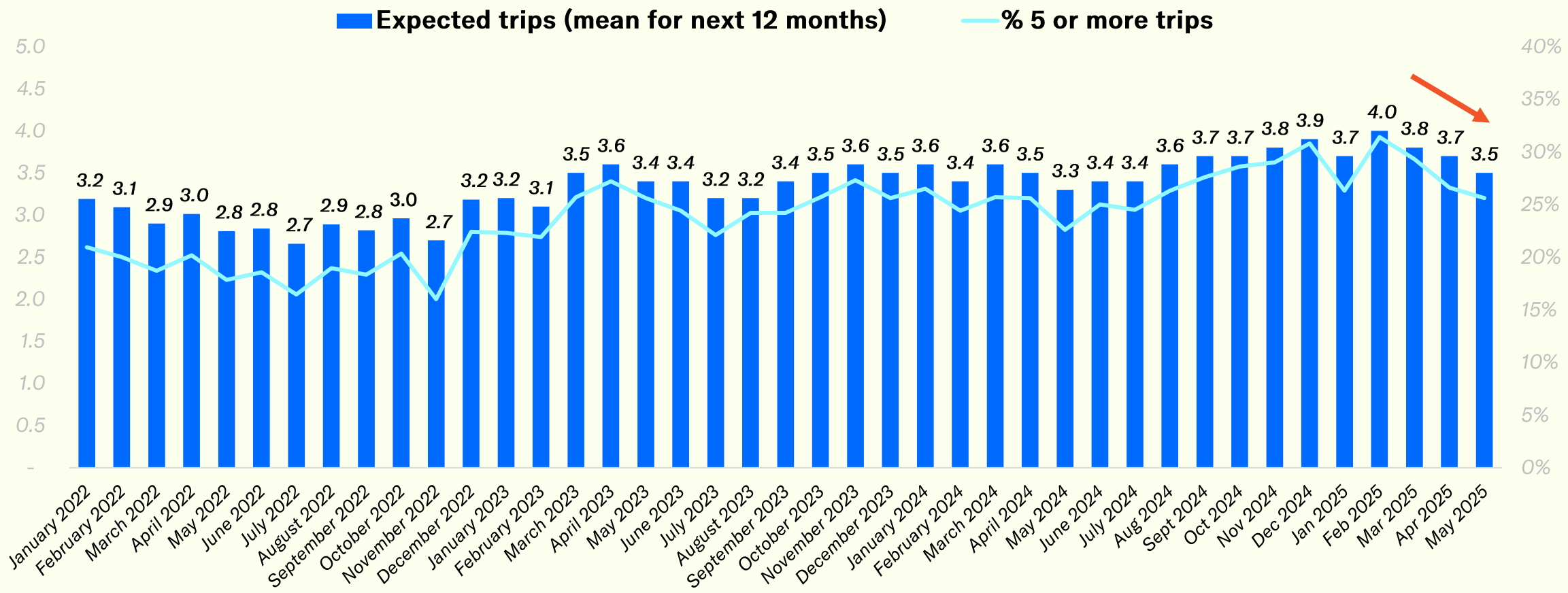
Expected Trip Volume Declines: Travelers Scale Back Their Planned Travel

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?



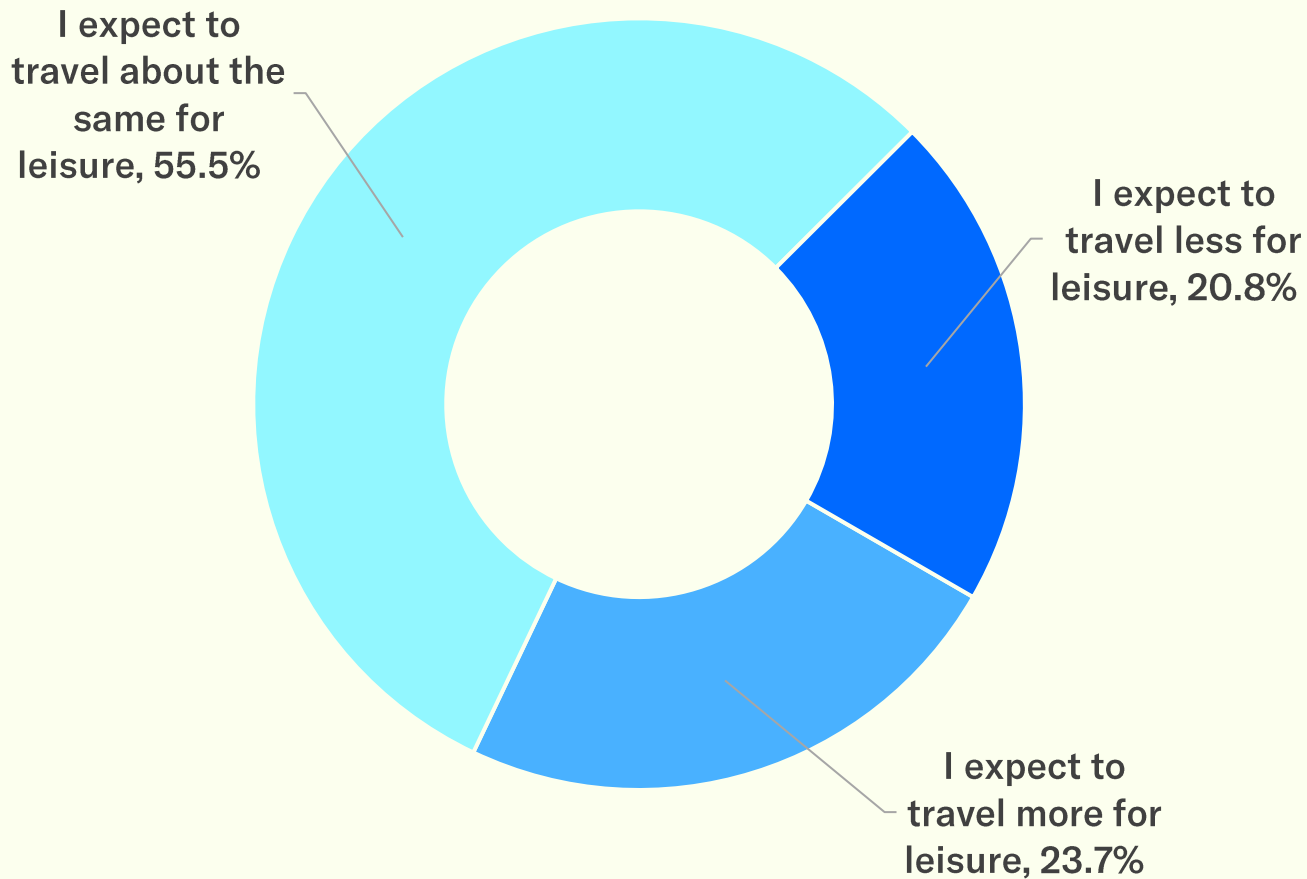
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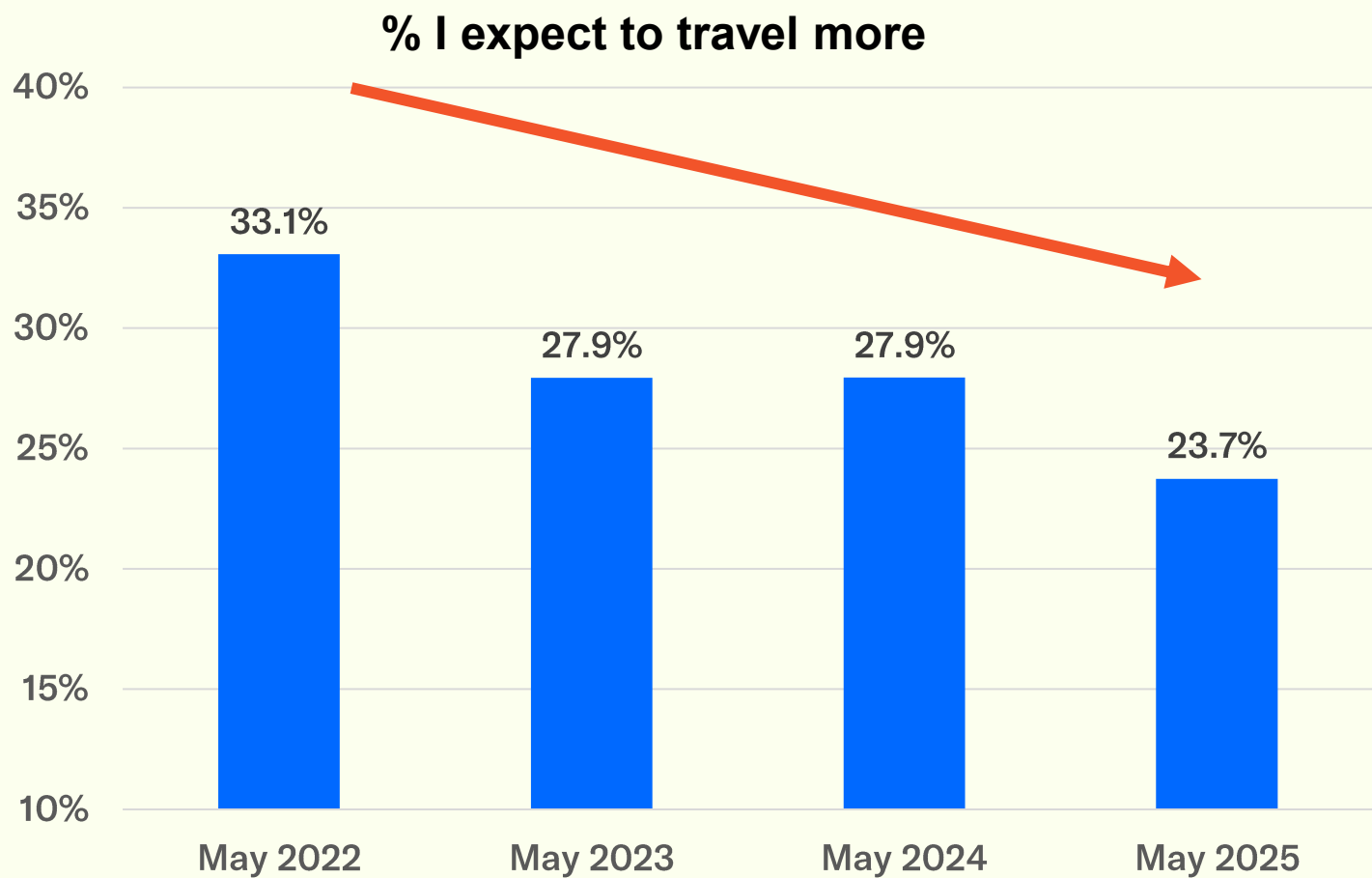
Plans to Travel More? Not So Much Right Now.

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?
(Select one)



Plans to Travel More? Not So Much Right Now.

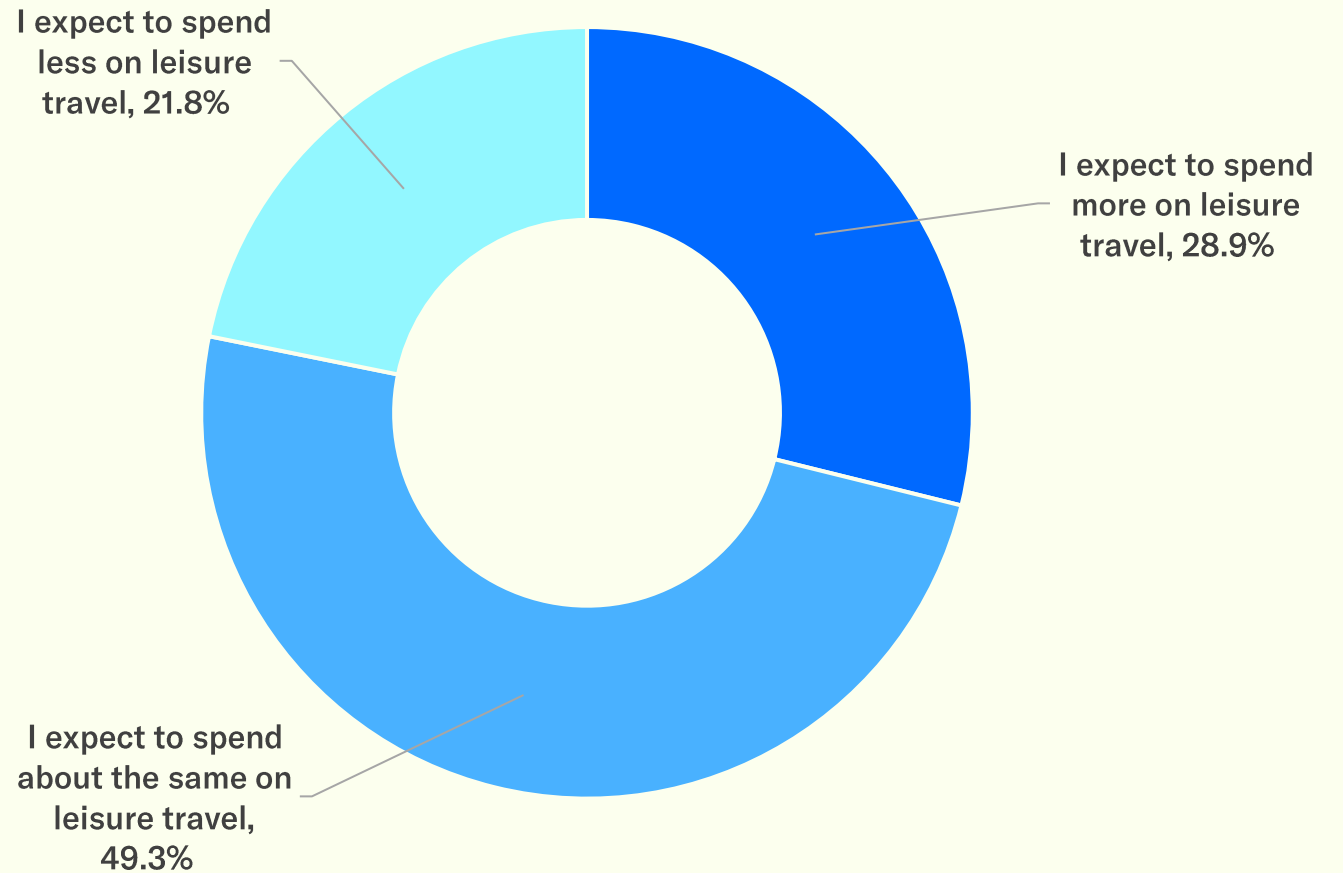
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Travel Spending Expectations Drop Alongside Trip Plans.

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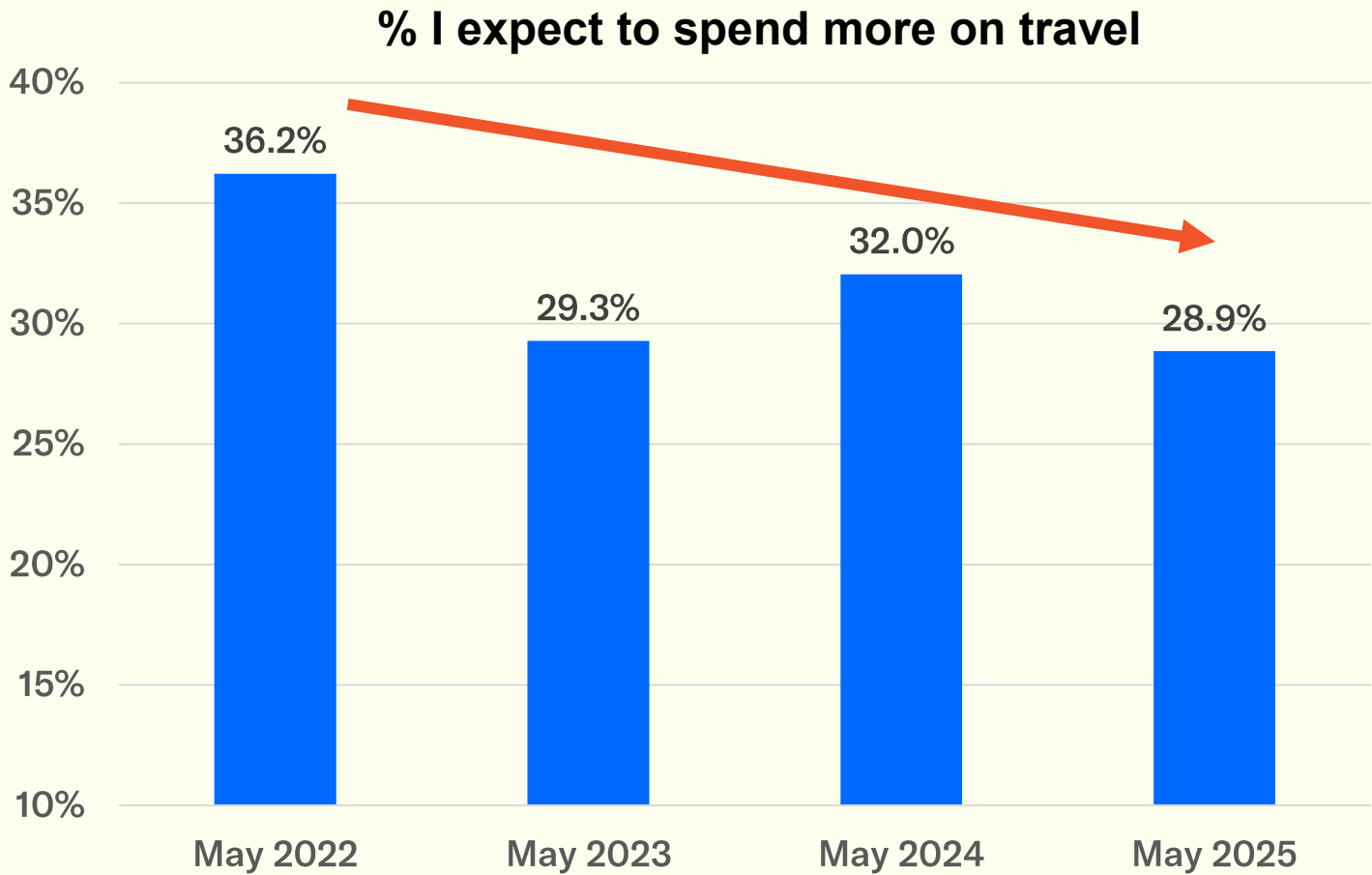
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Travel Spending Expectations Drop Alongside Trip Plans.

Question:

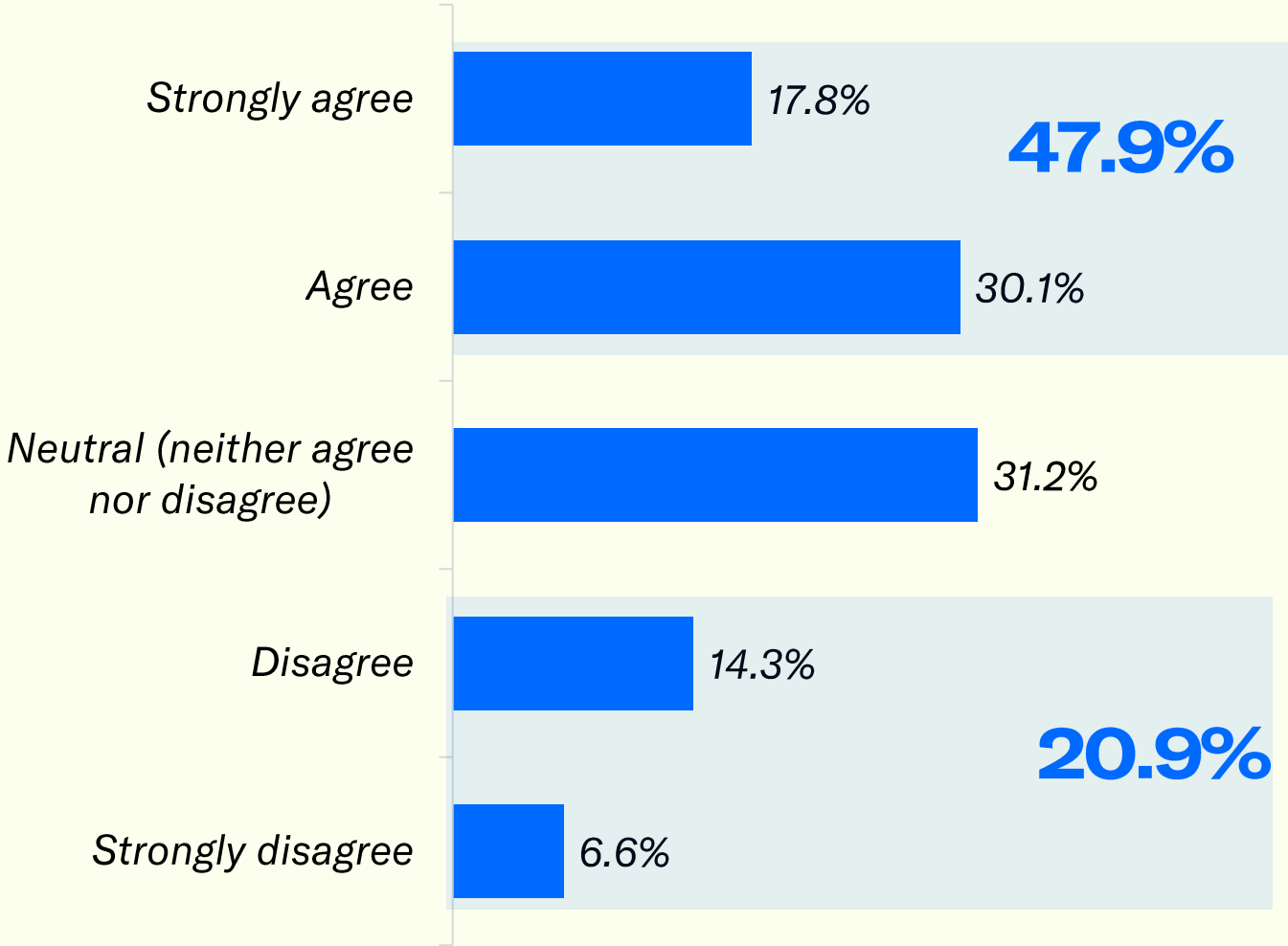
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Recession Concerns Ease: Fewer Than Half of Travelers Now Expect a Downturn.

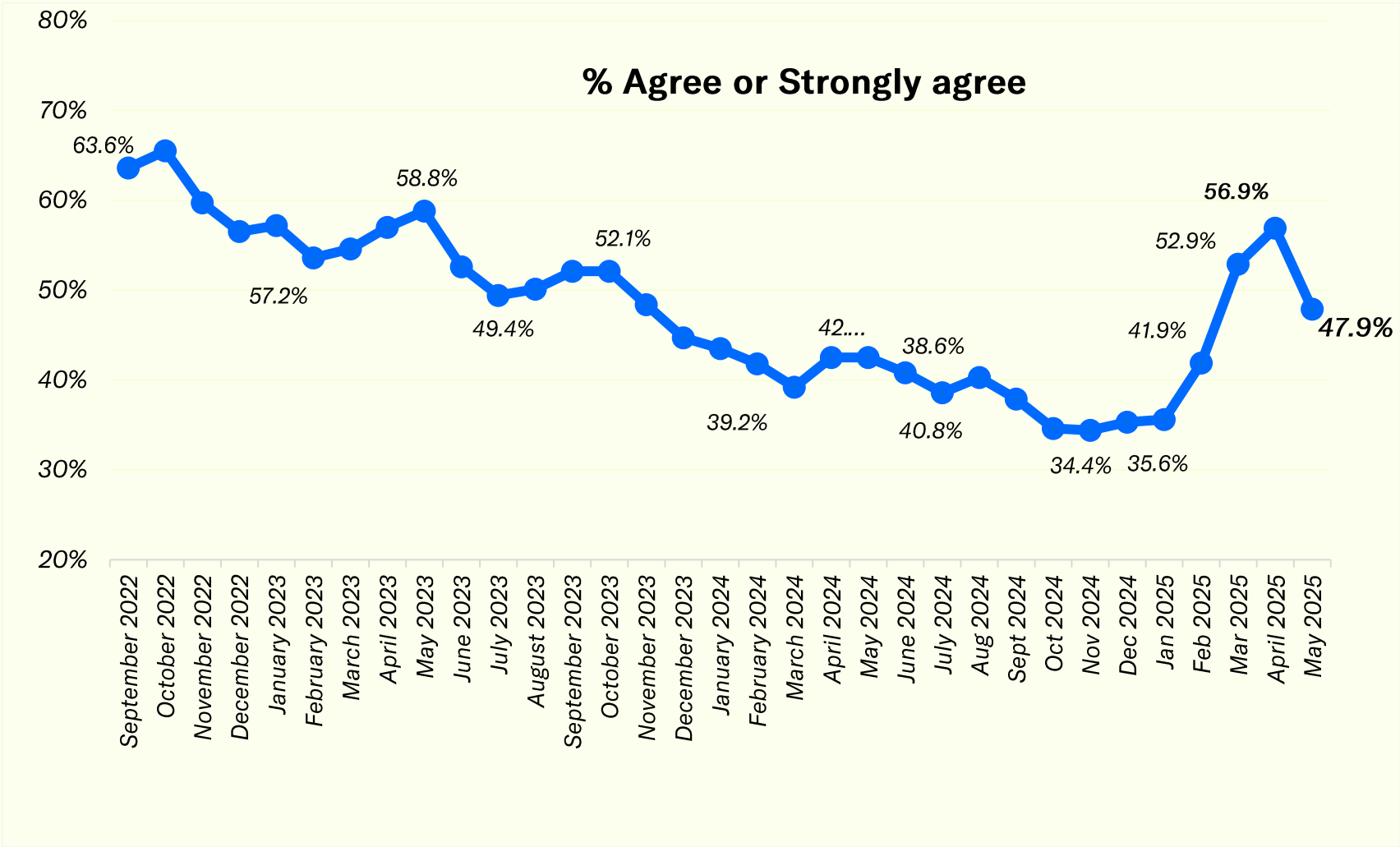
Question:

I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Recession Concerns Ease: Fewer Than Half of Travelers Now Expect a Downturn.

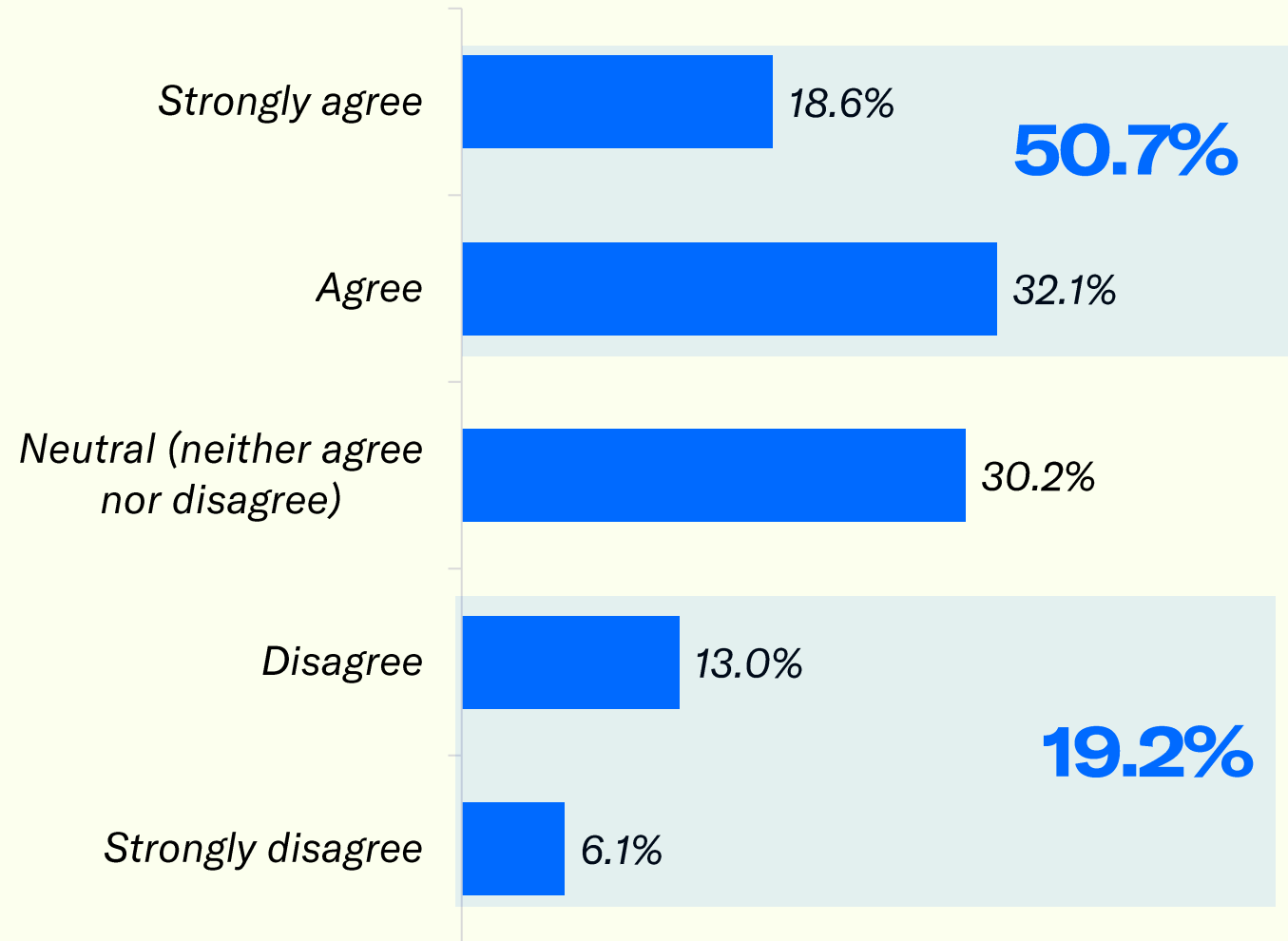
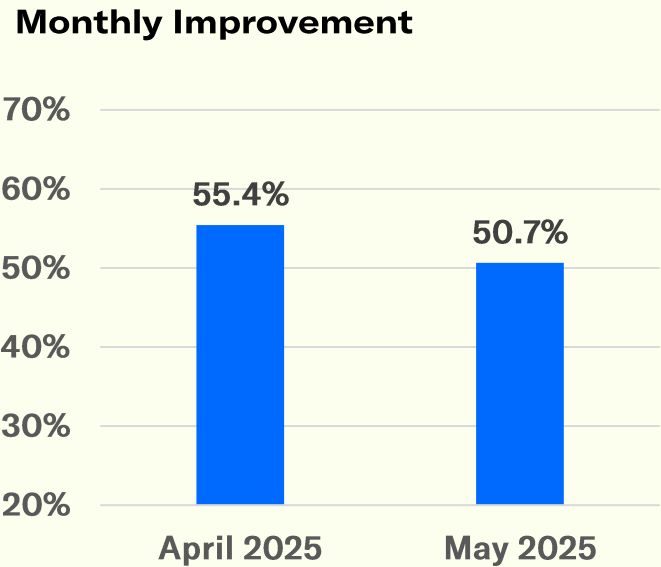
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



**How are Americans
adapting to the current
economic situation?**

Half of American travelers say they're being careful with money due to economic concerns.

Question:
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



**2-in-3 American travelers
expect to change their
behaviors due to economic
conditions.**

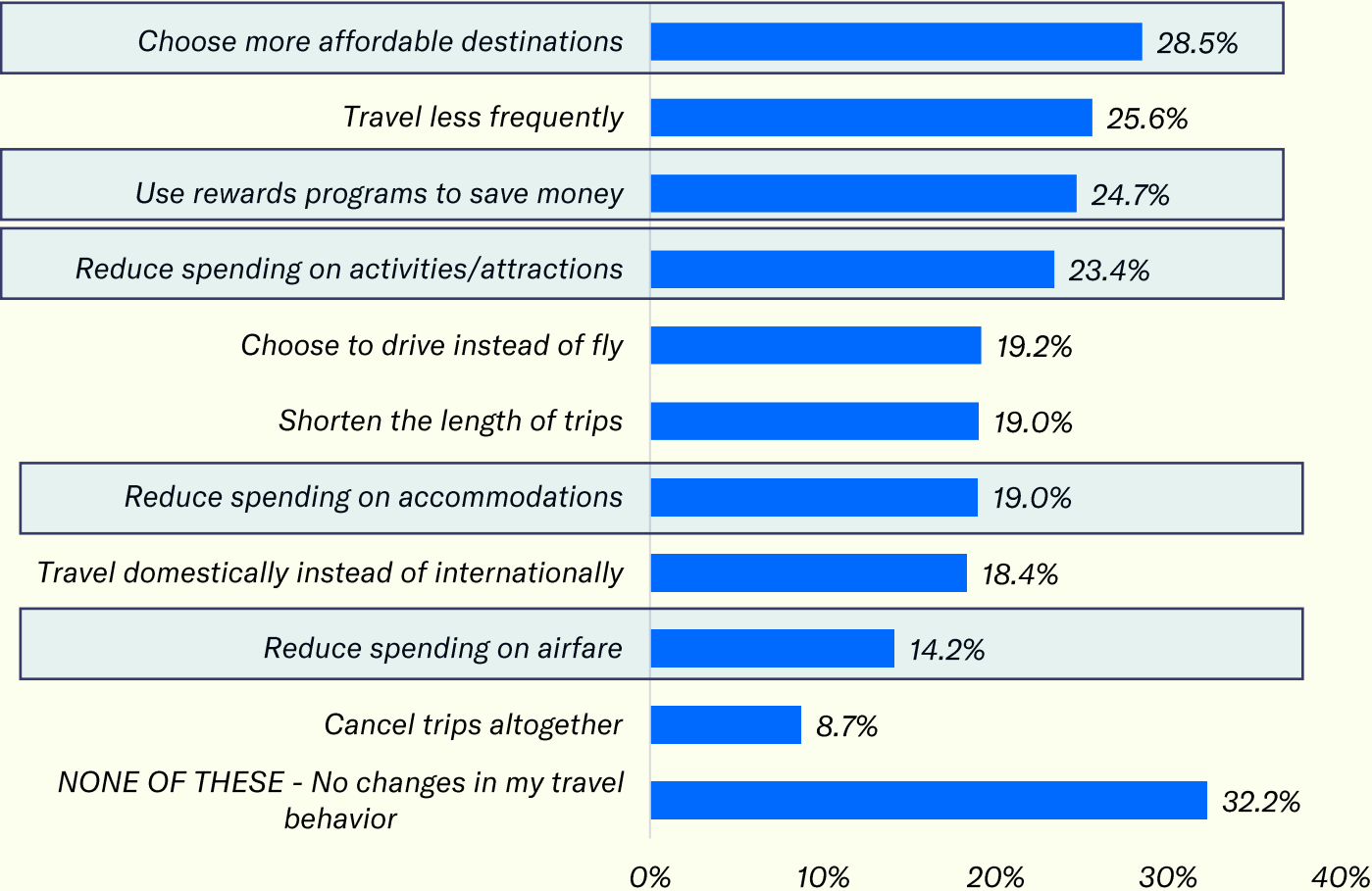
71% of travelers expects to be using one of these (in the next 6 months) to deal with economic concerns.

54.4%
(one of these)

Question:

Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

Due specifically to concerns about the economy, I expect to



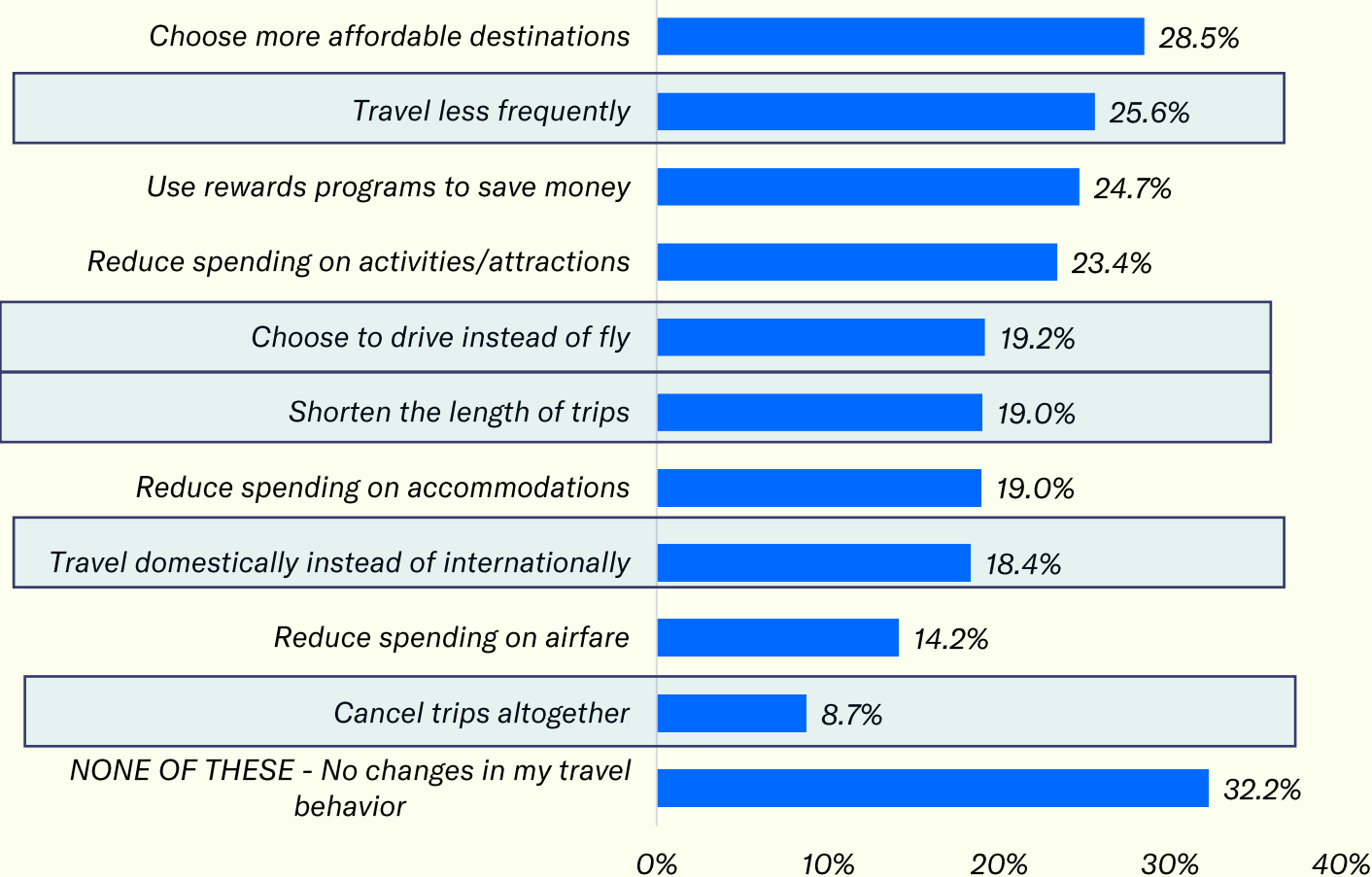
71% of travelers expects to be using one of these (in the next 6 months) to deal with economic concerns.

50.1%
(one of these)

Question:

Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

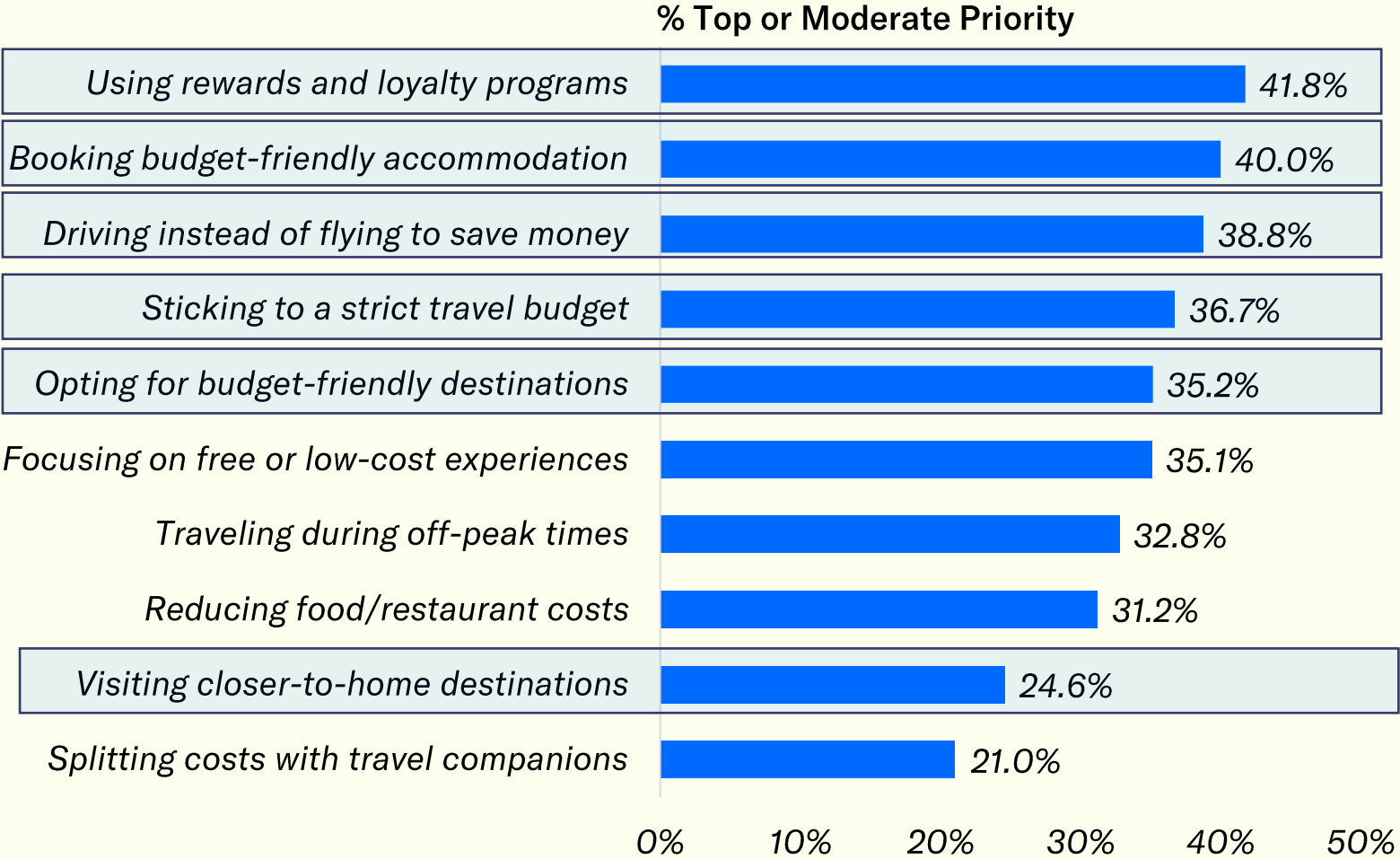
Due specifically to concerns about the economy, I expect to



Nearly 70% of Travelers Plan to Use Cost-Saving Strategies Amid Economic Concerns.

Question:
How much of a priority will each of the following factors be in your travel for SUMMER 2025?

(Please rate each one using the scale below)

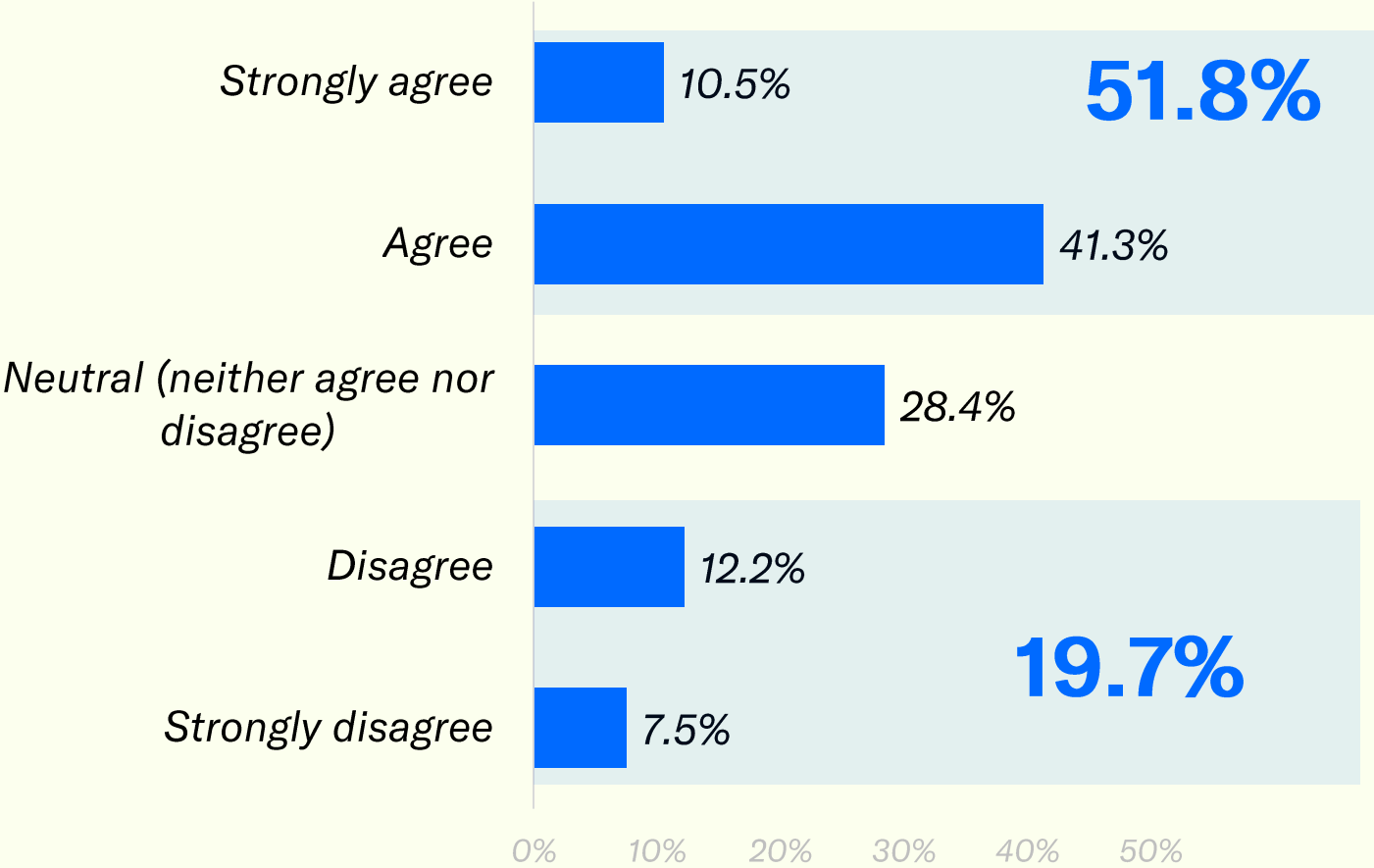


Recessionary Resilience



More than half feel travel is a worthwhile investment even in an economic downturn.

Question:
Even in an economic recession, I'd consider travel to be a worthwhile investment.



The Recession-proof Traveler



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Recession-Proof Traveler

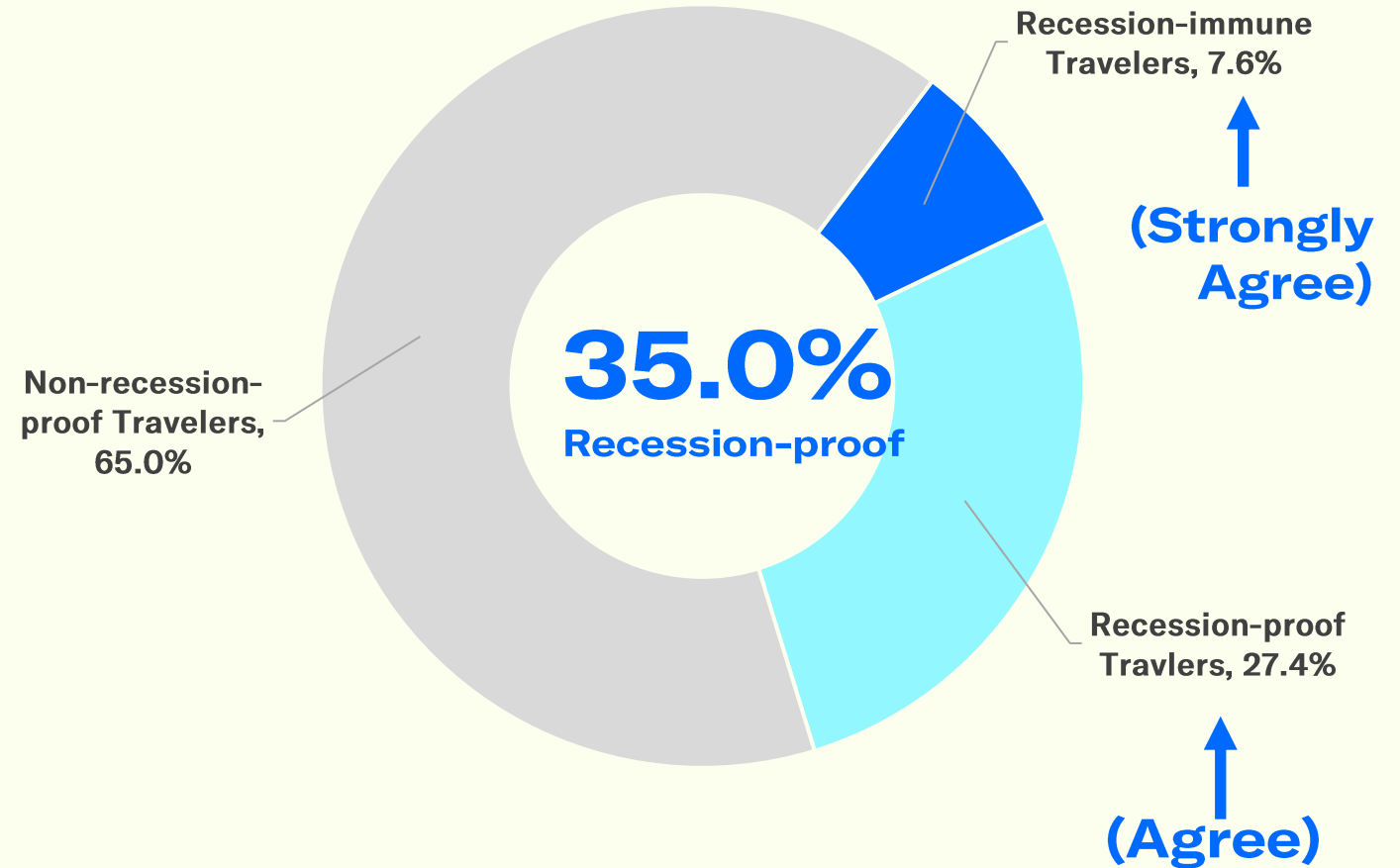
Agrees that even in an economic recession, they'd consider travel to be a worthwhile investment.

+

Expects to take 3+ trips in the next year

Recession-proof travelers account for about 1/3 of the traveling population.

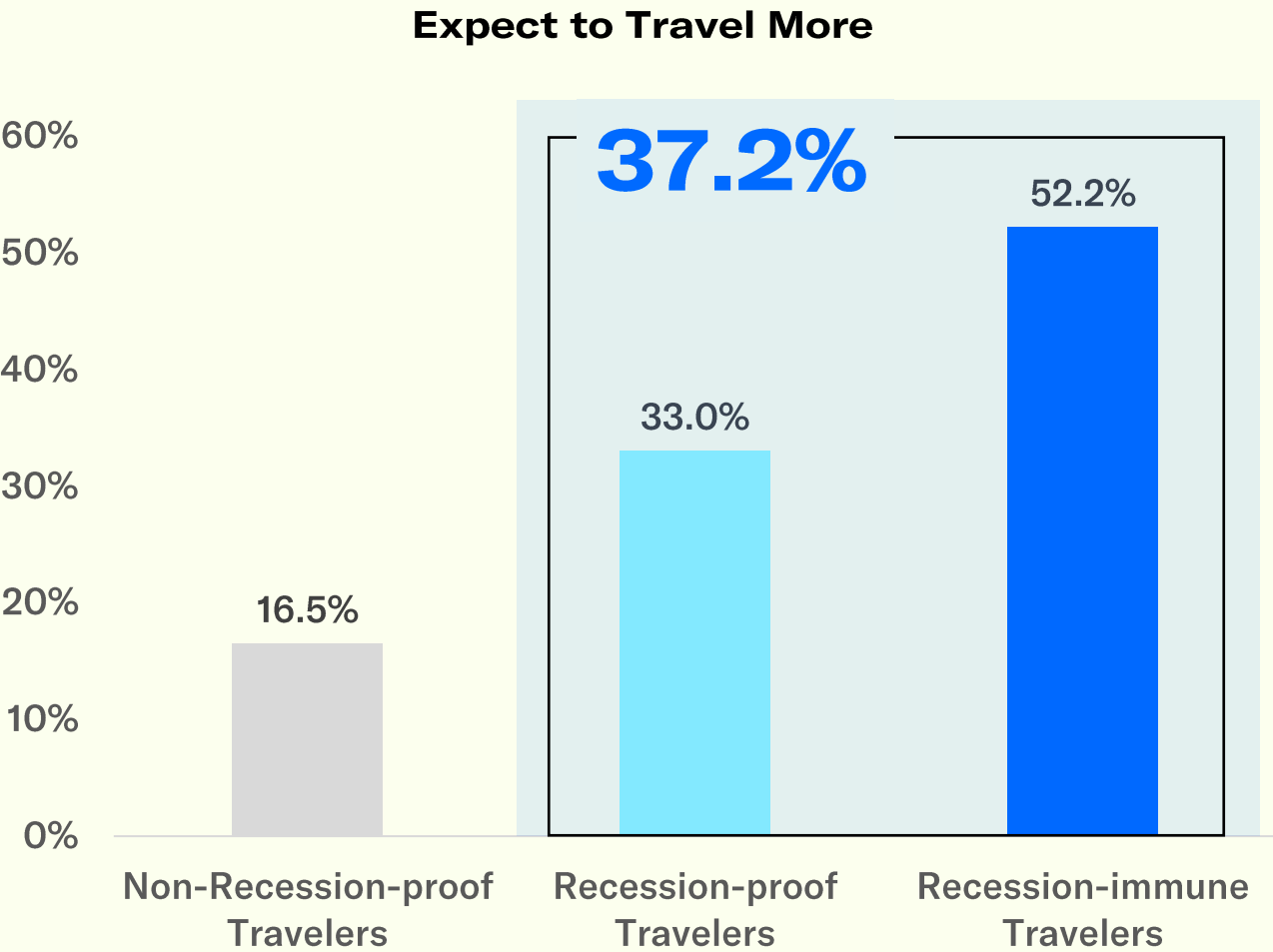
Statement: Even in an economic recession, they'd consider travel to be a worthwhile investment.



Recession-proof travelers expect to increase their travels in the next twelve months.

Question:

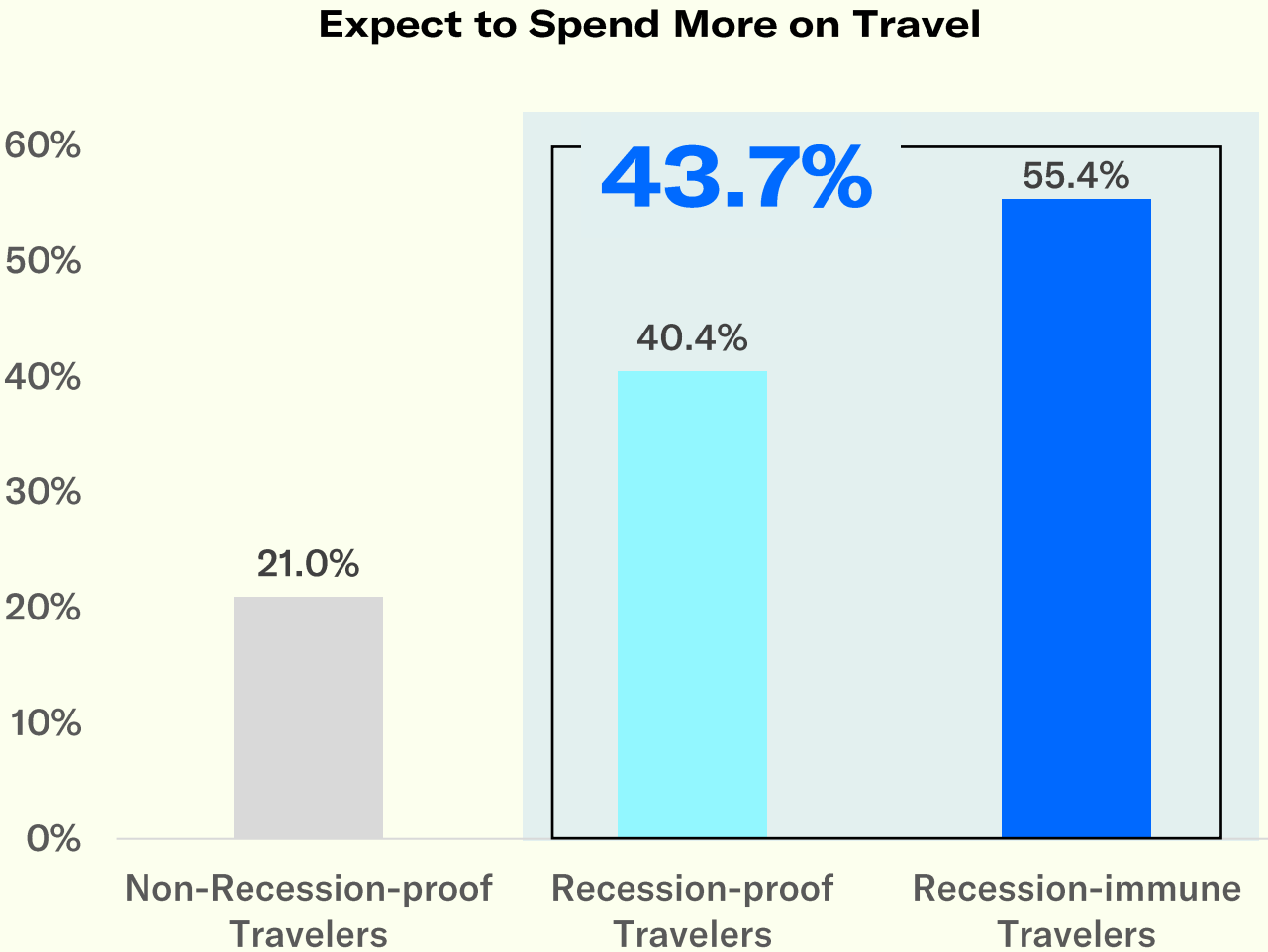
In the NEXT 12 MONTHS, do you expect to travel more than you did in the most recent 12-month period? (Select one)



Recession-proof travelers expect to increase their travel spending in the next twelve months.

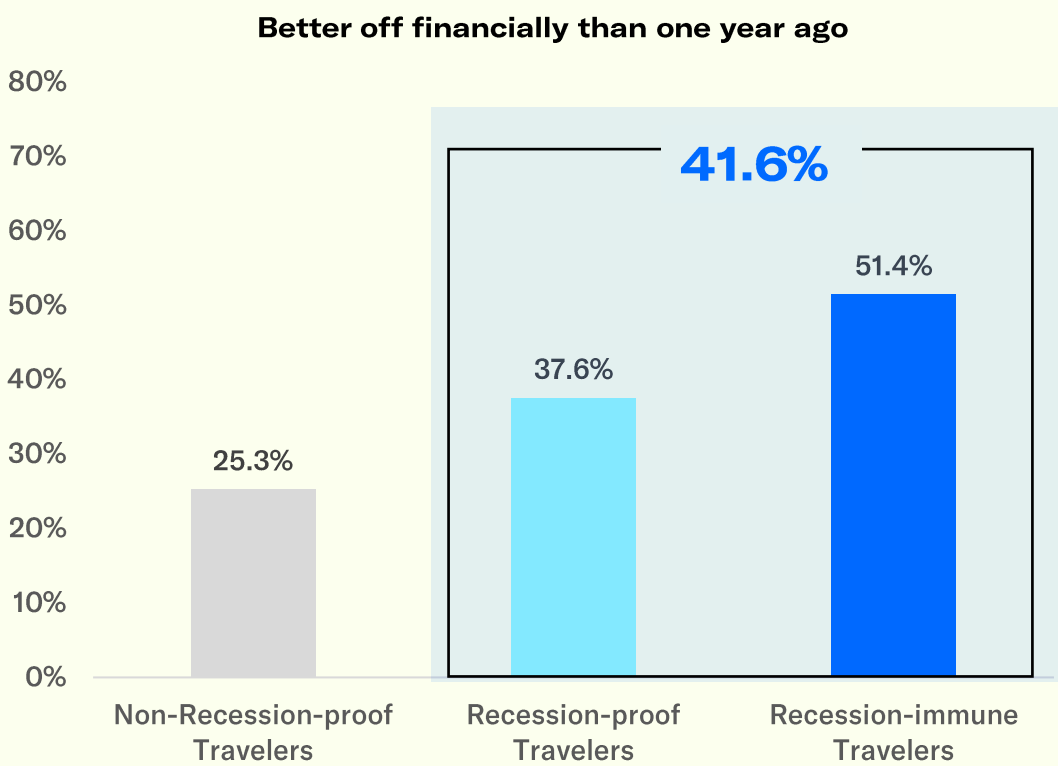
Question:

In the NEXT 12 MONTHS, do you expect to travel more than you did in the most recent 12-month period? (Select one)

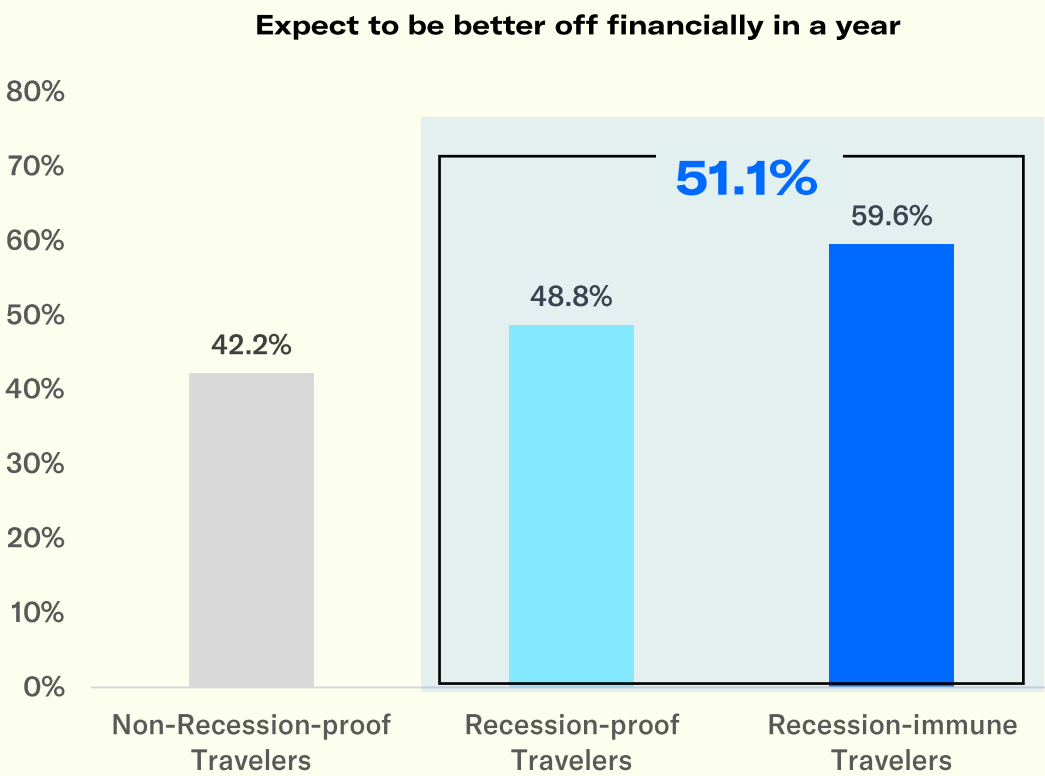


Recession-proof travelers are feeling good financially and expect the good times to roll.

Question: *Would you say that you (and your household) are better off or worse off financially than you were a year ago?*



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?*



**Across all sentiment
tracking metrics,
recession-proof travelers
perform far better than
other travelers.**

They're ready to travel and spend money, despite economic uncertainty.

What else do we know about them?

No interesting age differences appear.

Question:

In what year were you born?

Average age

60

55

50

45

40

35

30

25

20

49.2

51.1

49.7

50.8 Years old

Non-Recession-proof
Travelers

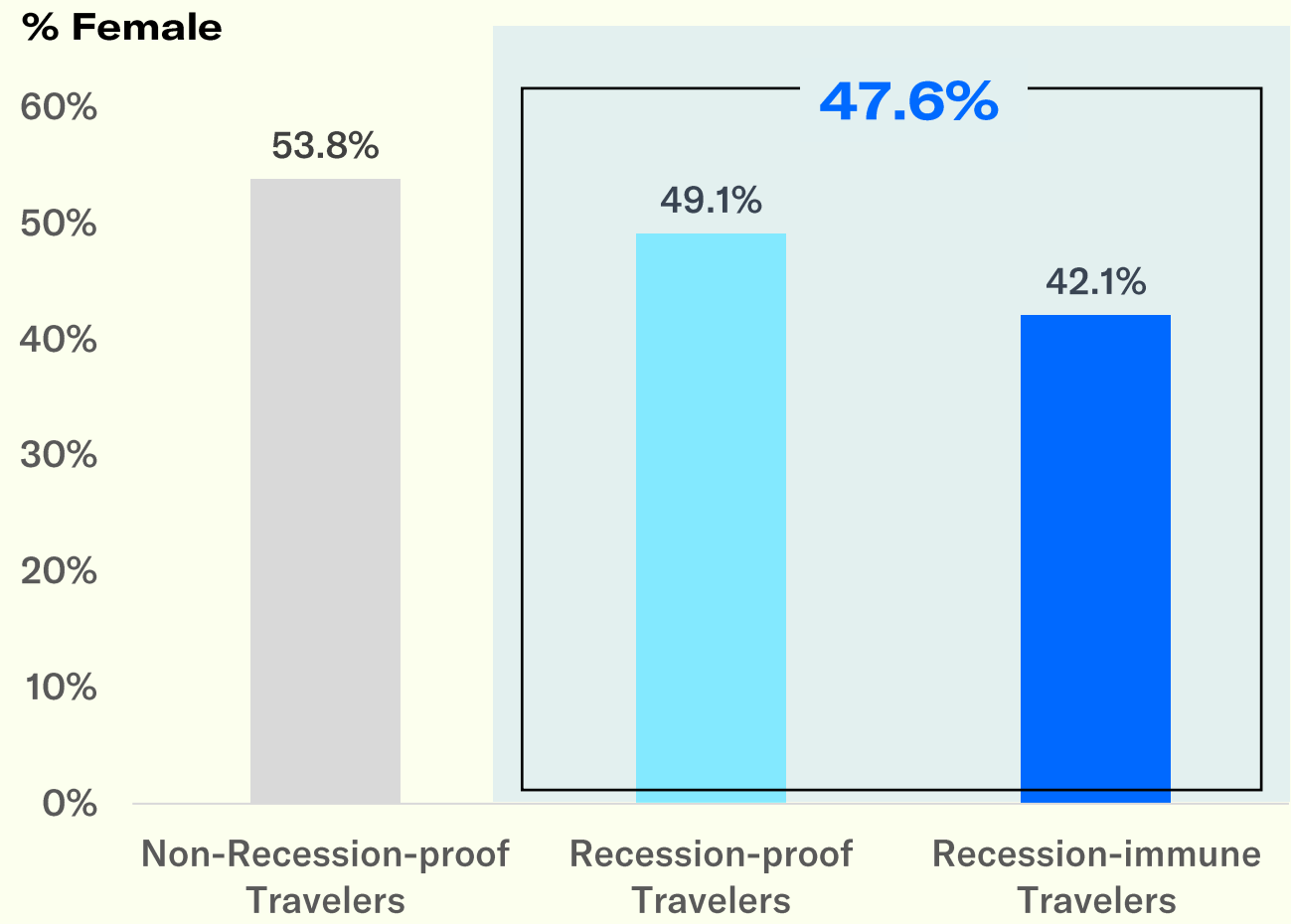
Recession-proof
Travelers

Recession-immune
Travelers

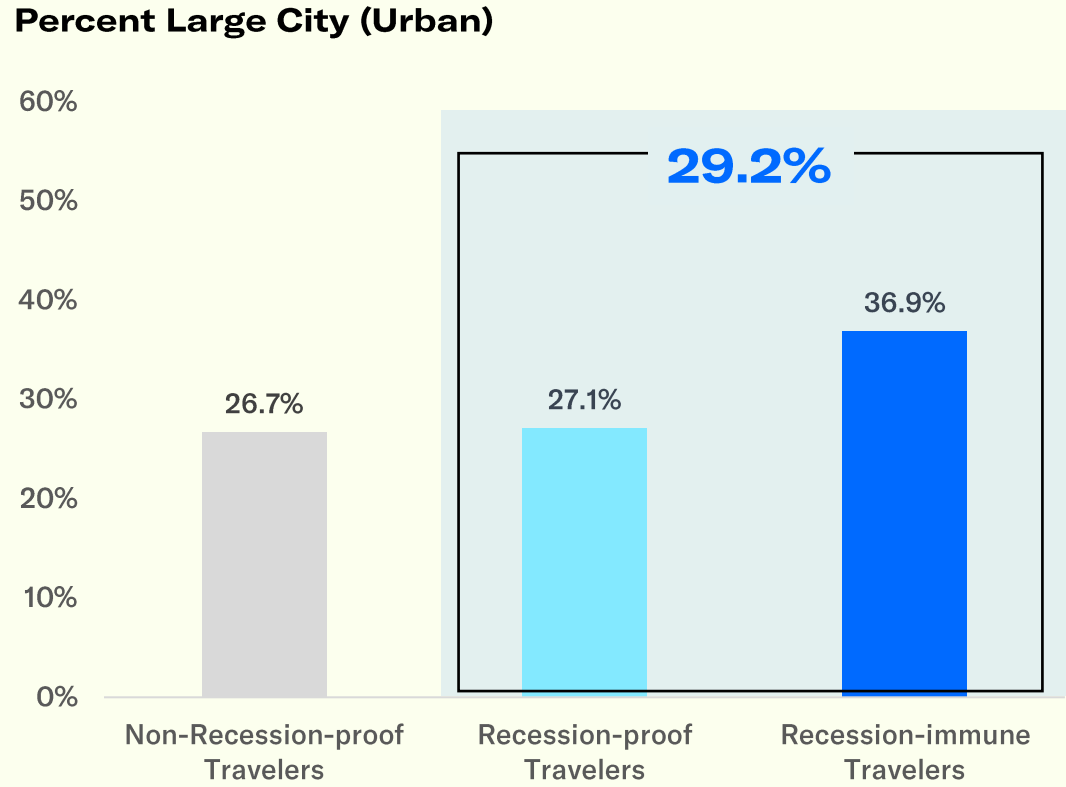
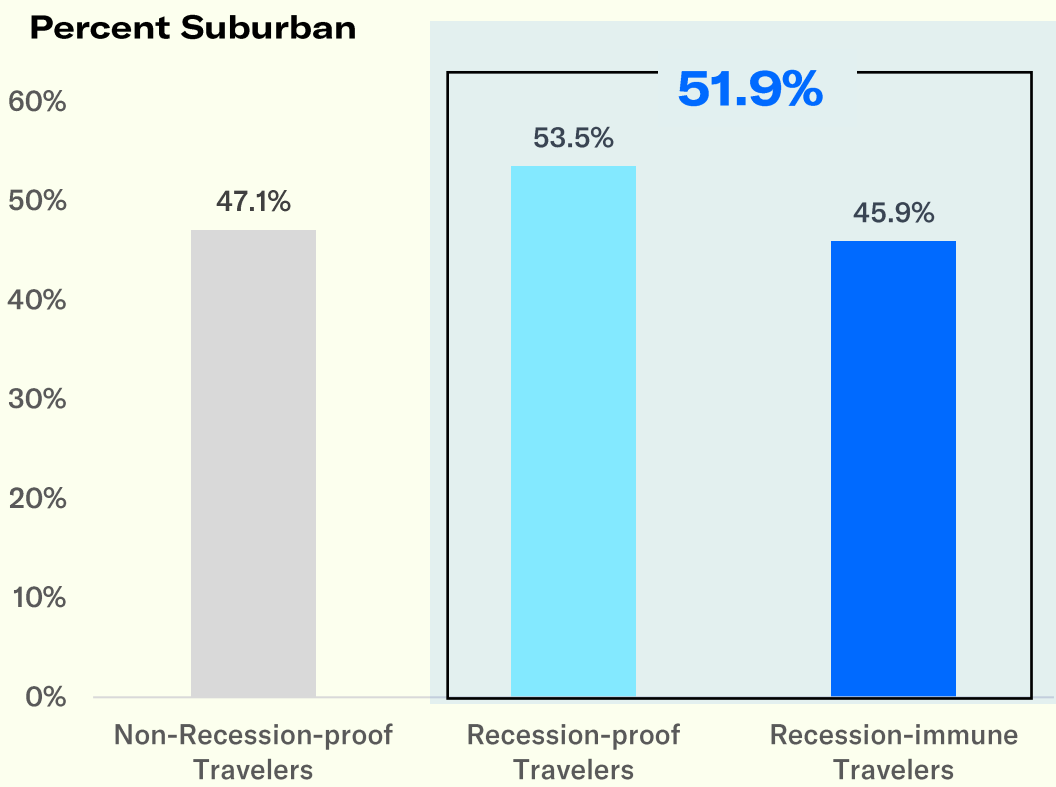
Recession-proof travelers skew slightly male.

Question:

What is your gender?

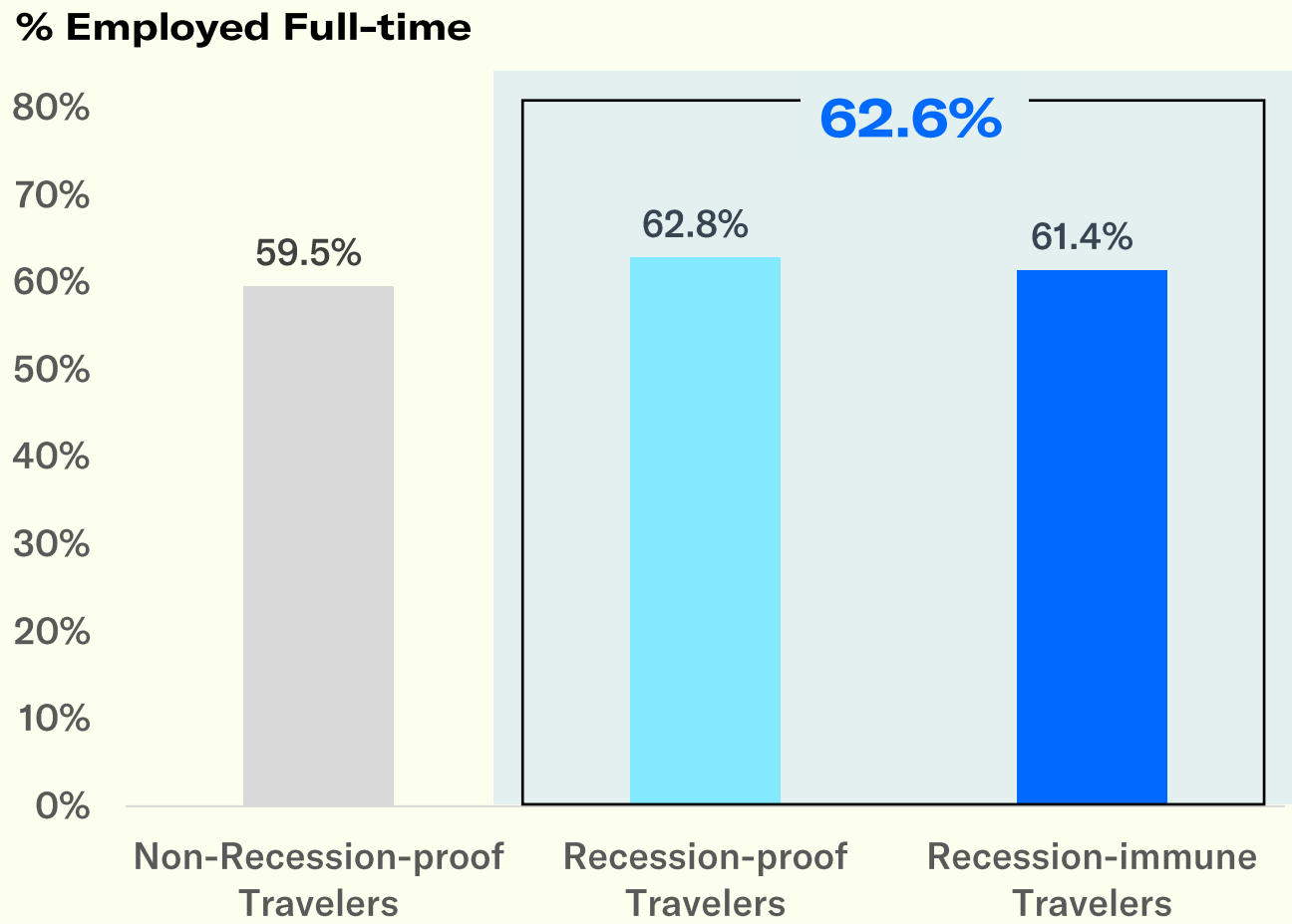


Recession-proof Travelers more likely to be urbanites and suburbanites.



They Have Similar Employment Statuses

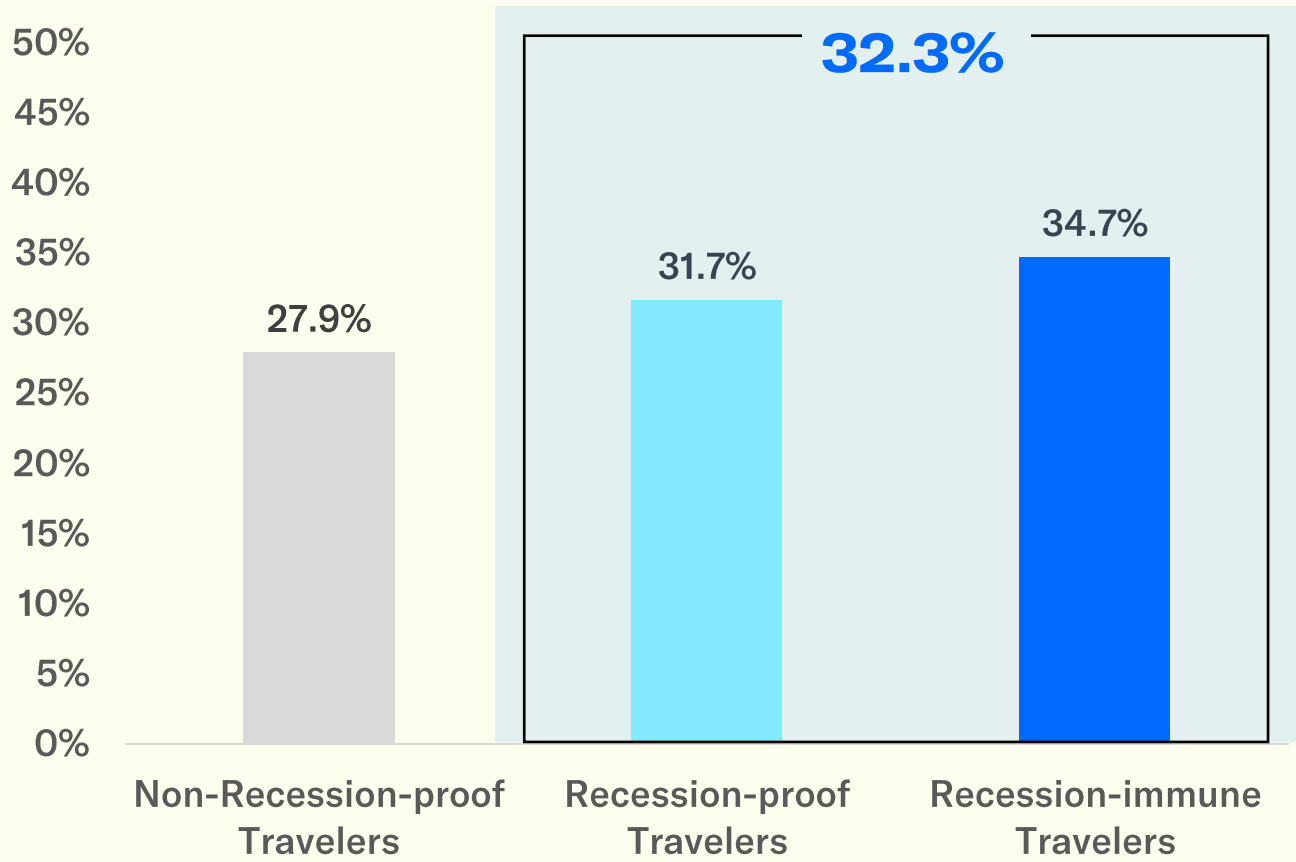
Question:
Which best describes your current employment status?



They're Slightly More Likely to Have Kids.

Question:
Are you a parent to school-aged children who travel with you at least once a year?

% Parents with children

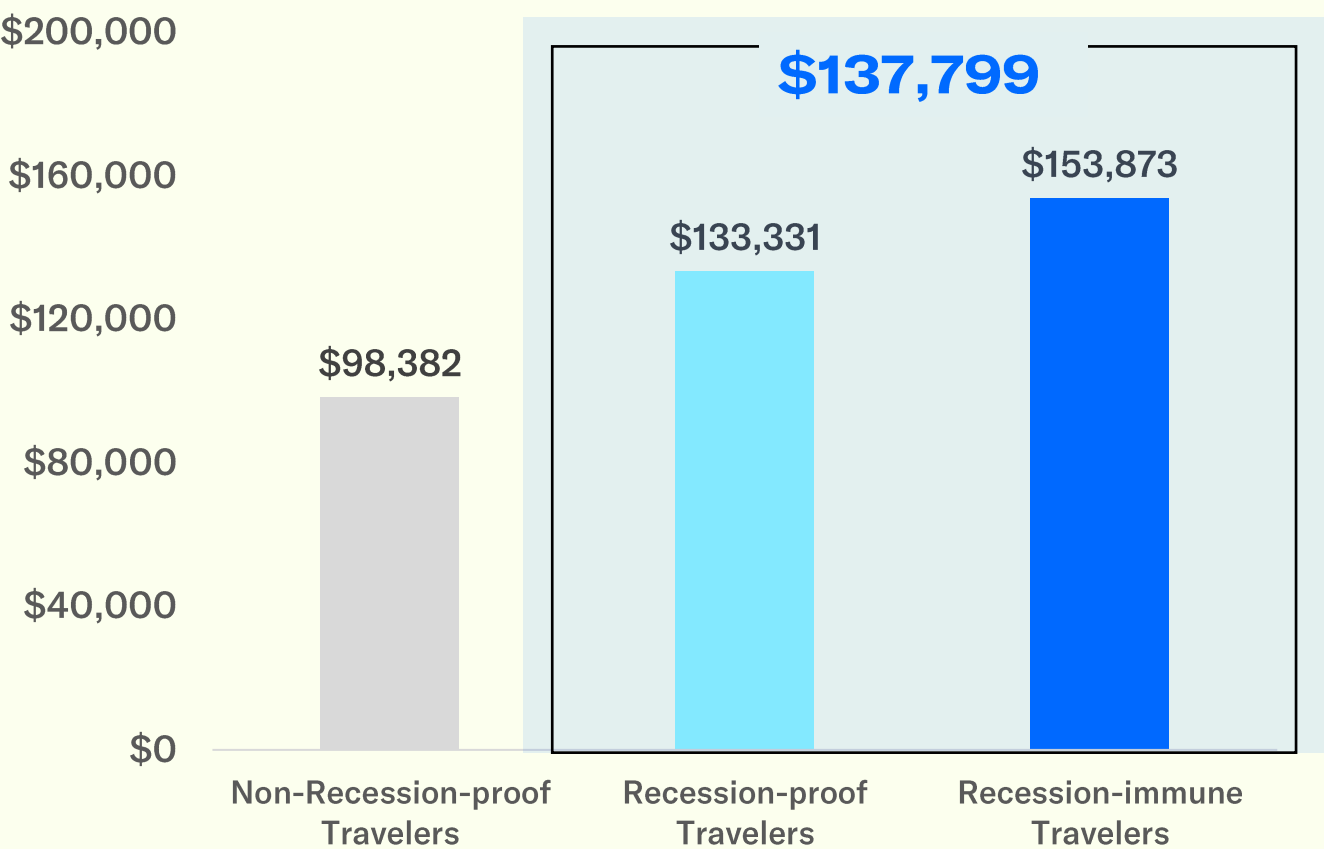


Recession-proof travelers have far greater incomes to spend on travel

Question:

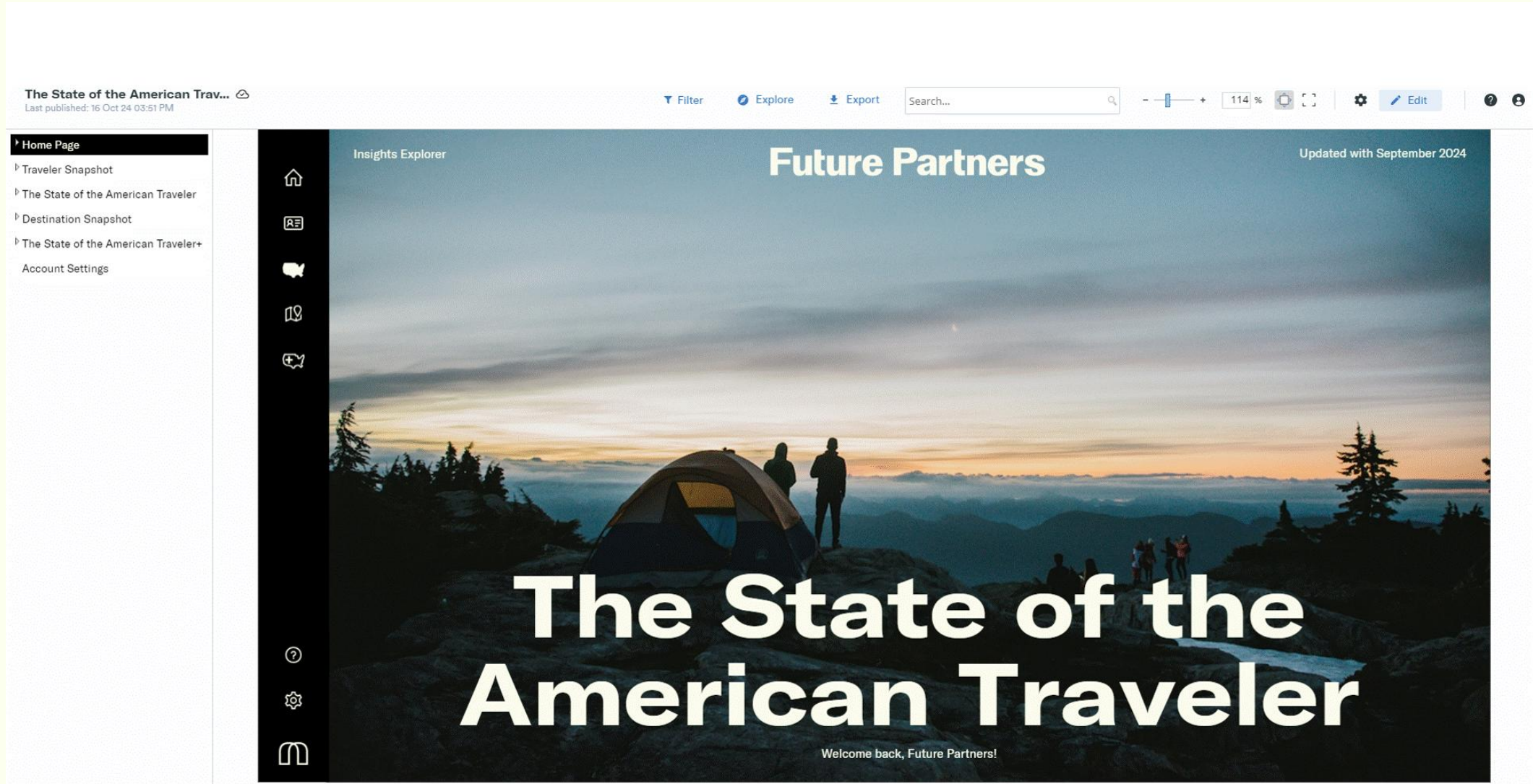
Which best describes the combined annual income of all members of your household?

Average annual household income



**Demographically speaking
recession-proof travelers
not wildly different, except
when it comes to income.**

The State of the American Traveler Insights Explorer: On-Demand Insights into Your Audiences and Brand Performance



Our New Targeting Solution:

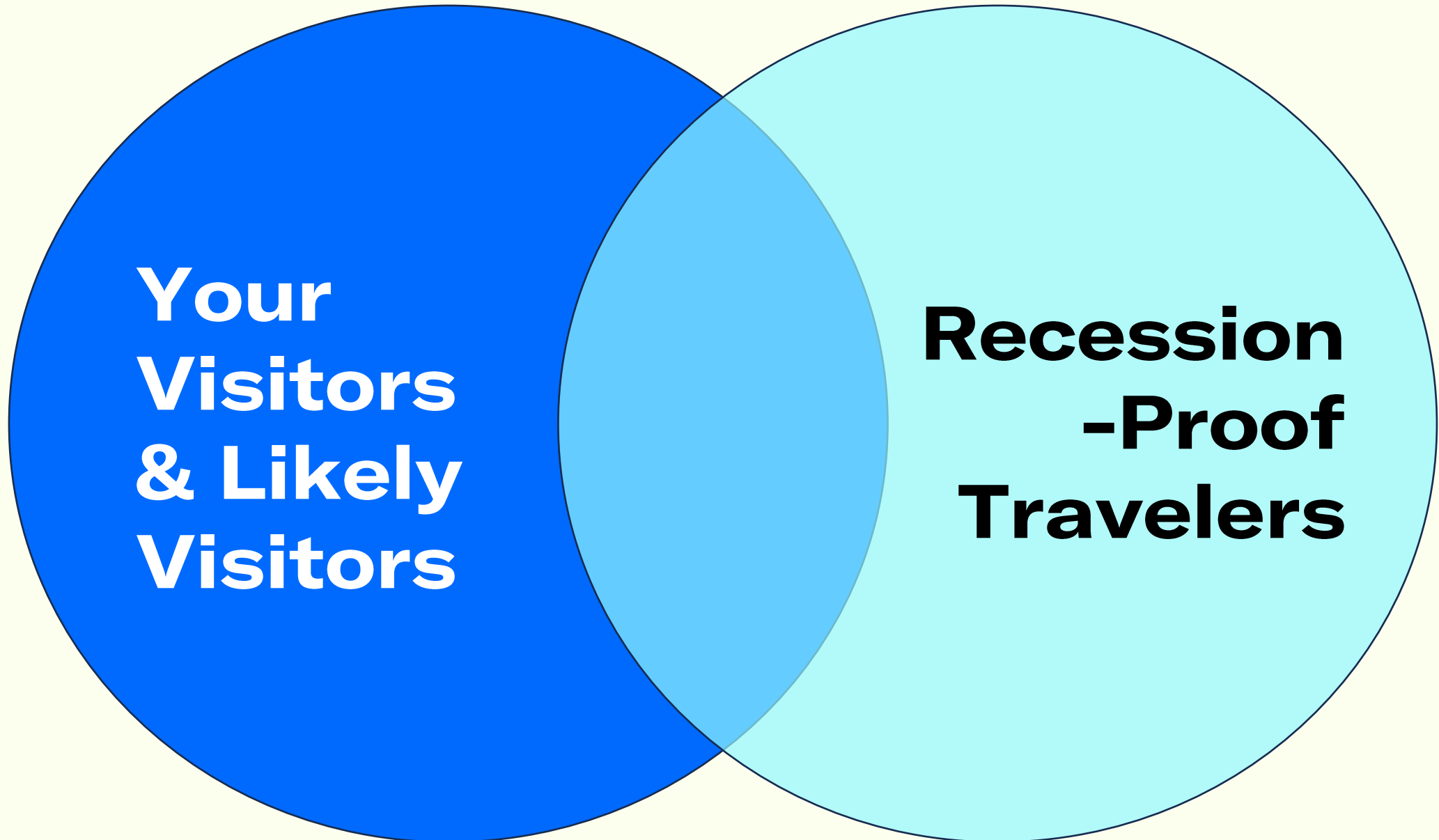
Recession-proof Traveler

+

Destination-orientation

i.e., Recent visitors or likely visitors (next 12 months)

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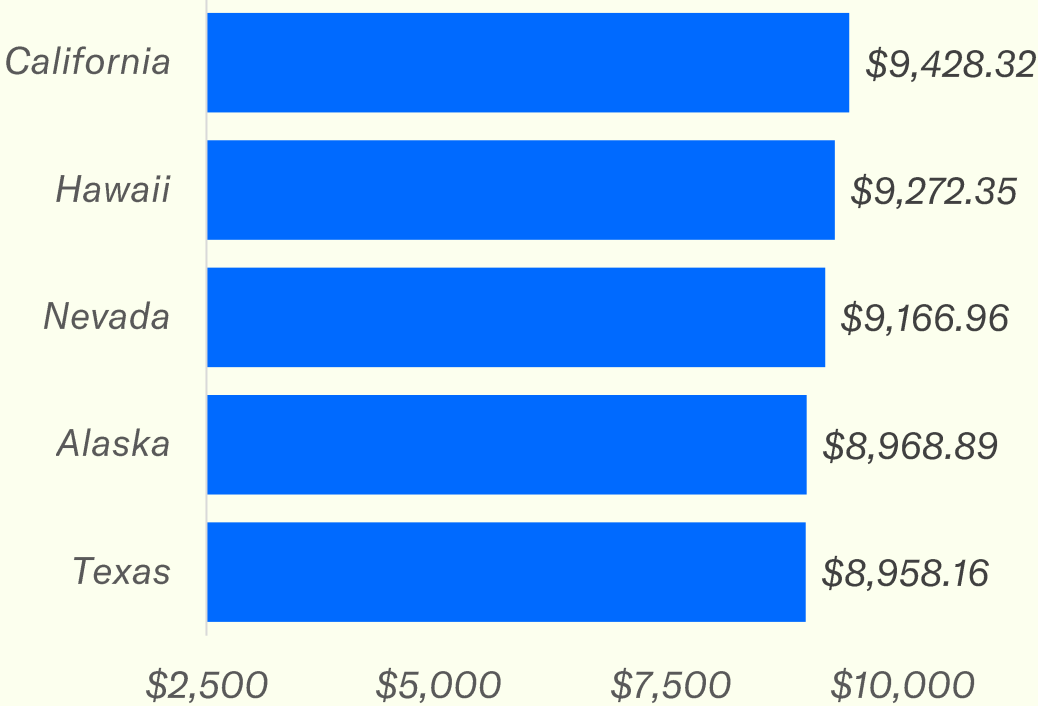
Available Soon with Insights Explorer Subscriptions:

- **50 States**
- **68 major cities**
 - **Wine country regions**
 - **Lake destinations**
 - **Beach-coastal destinations**
- **79 Foreign countries**

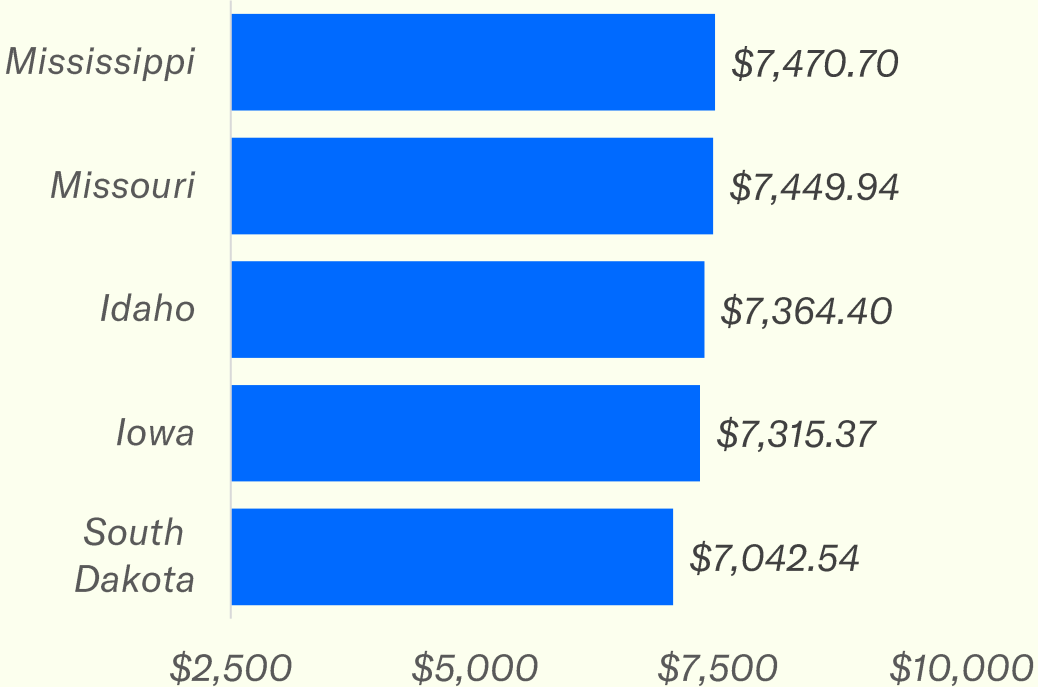
Recession-proof Traveler Budgets, by State

(Avg. maximum travel budget of recession-proof travelers
visiting the state in past year or likely to visit in the next year)

Top 5 States



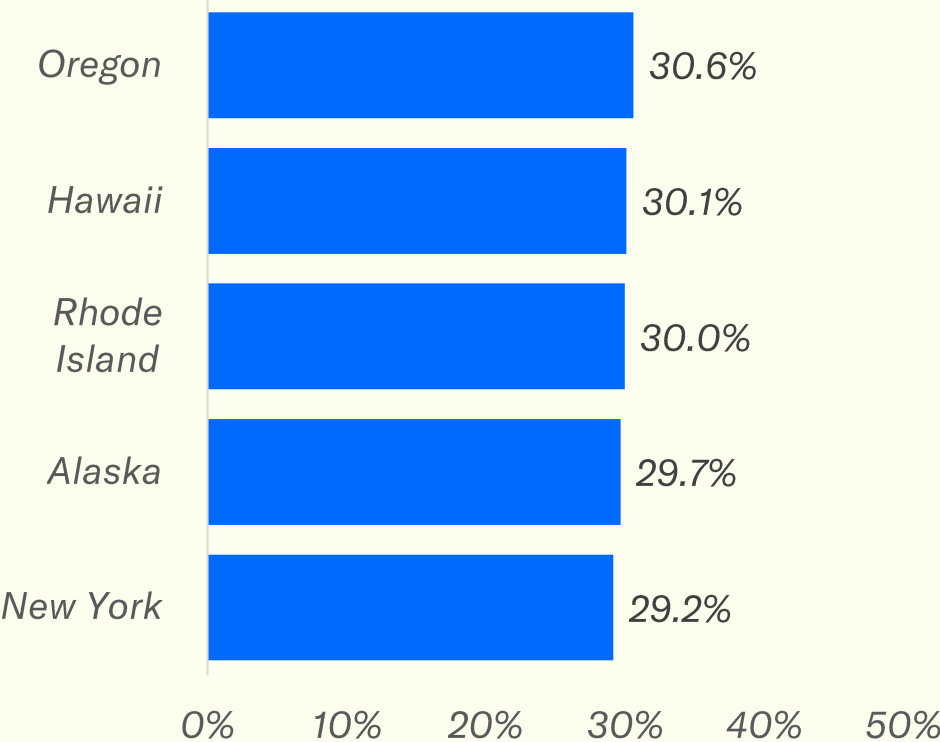
Bottom 5 States



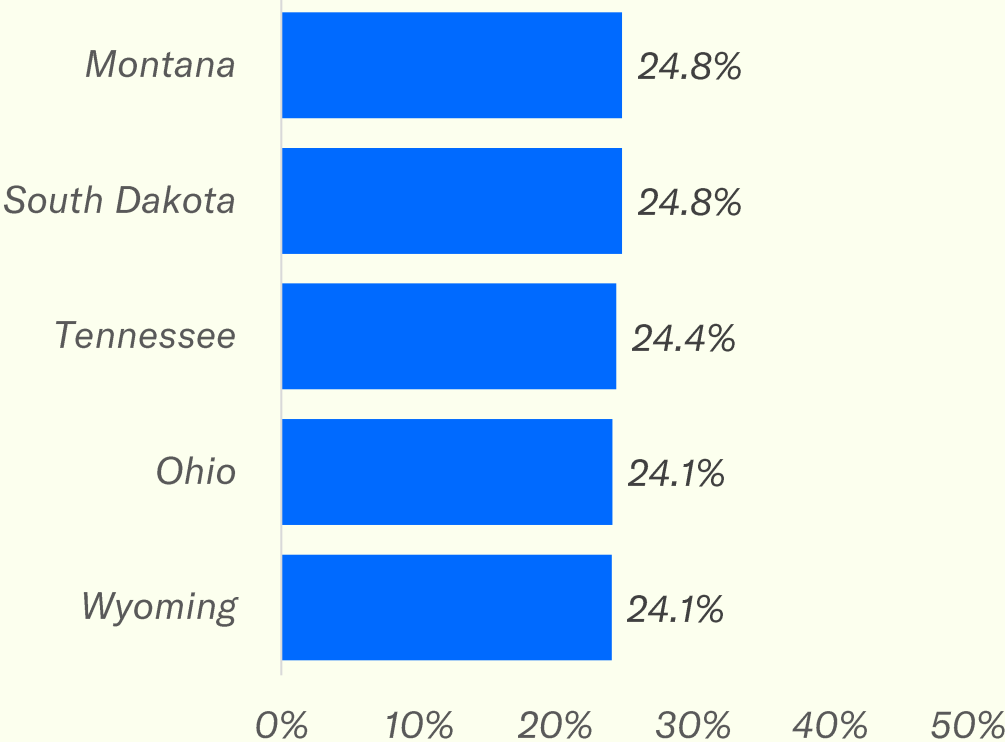
Foodie Recession-proof Travelers, by State

(Recession-proof travelers visiting in past year or likely to visit in the next year + Passionate about food)

Top 5 States



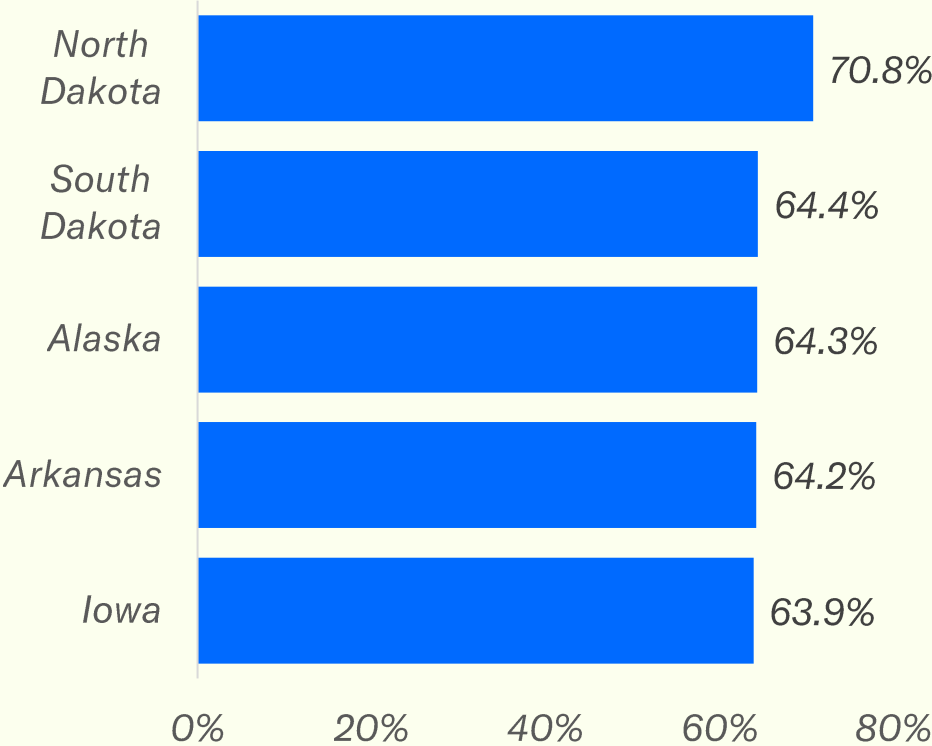
Bottom 5 States



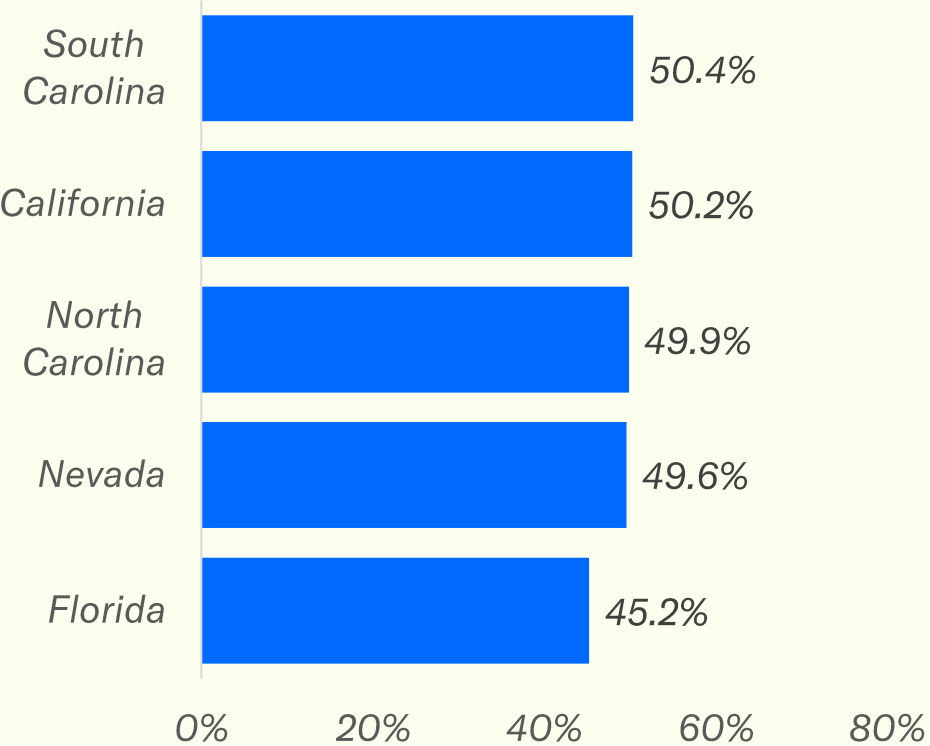
DMO-using Recession-proof Travelers, by State

(Recession-proof travelers visiting in past year or likely to visit in the next year + Used DMOs for travel planning in past year)

Top 5 States



Bottom 5 States

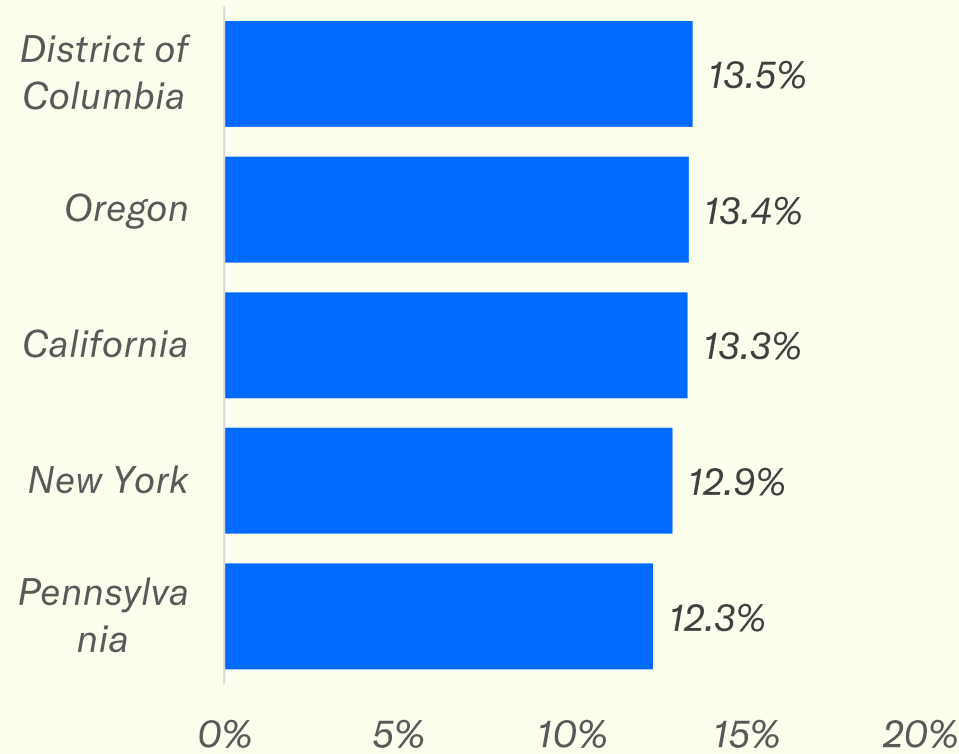


Question: In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel?

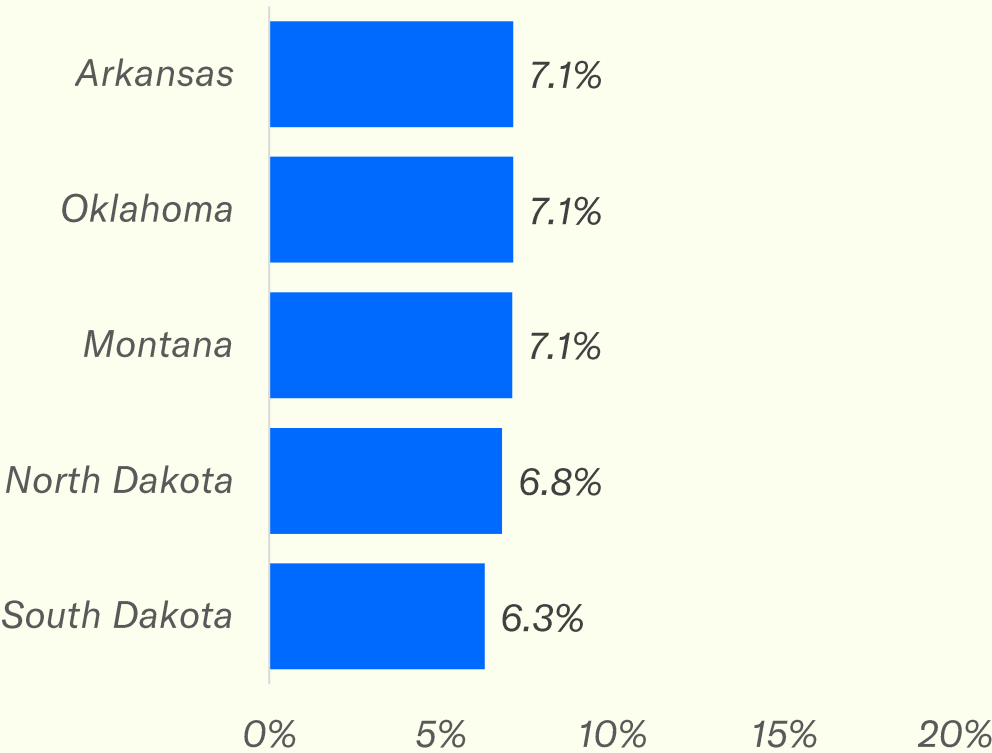
NPR Viewing/Listening Recession-proof Travelers, by State

(Travelers visiting in past year or likely to visit in the next year + regularly watches/listens to NPR)

Top 5 States



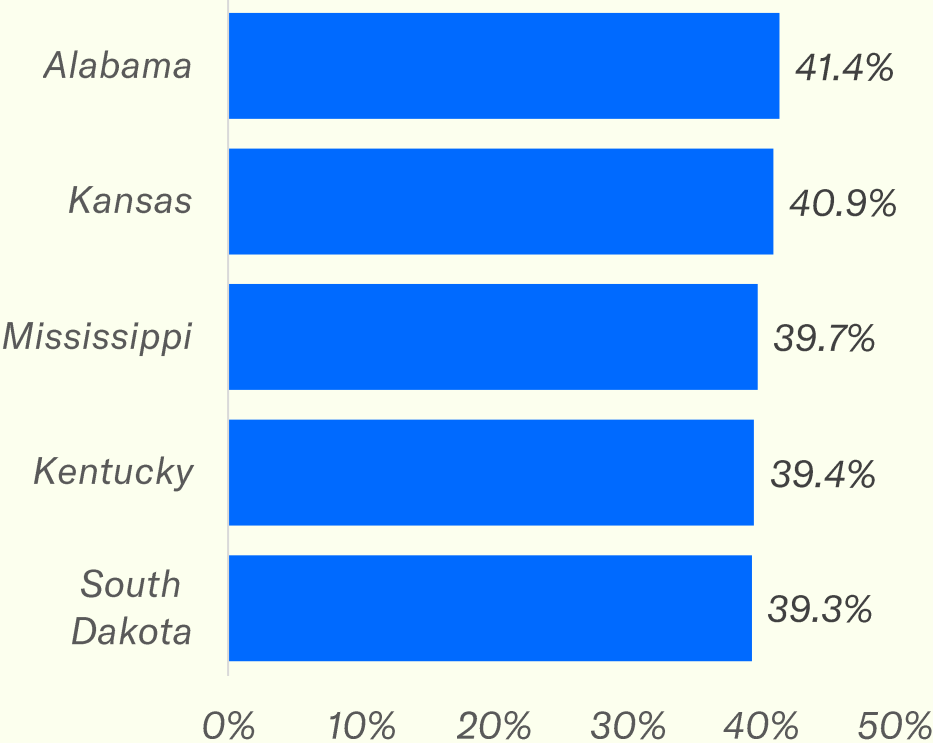
Bottom 5 States



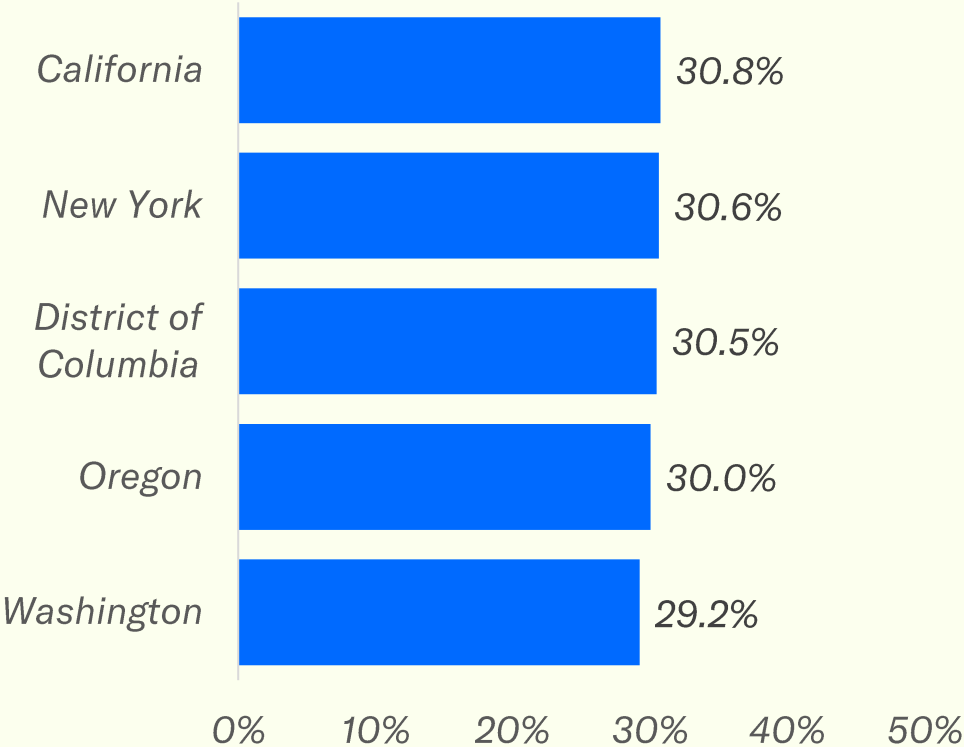
Fox News Viewing Recession-proof Travelers, by State

(Travelers visiting in past year or likely to visit in the next year + regularly watches FOX News)

Top 5 States

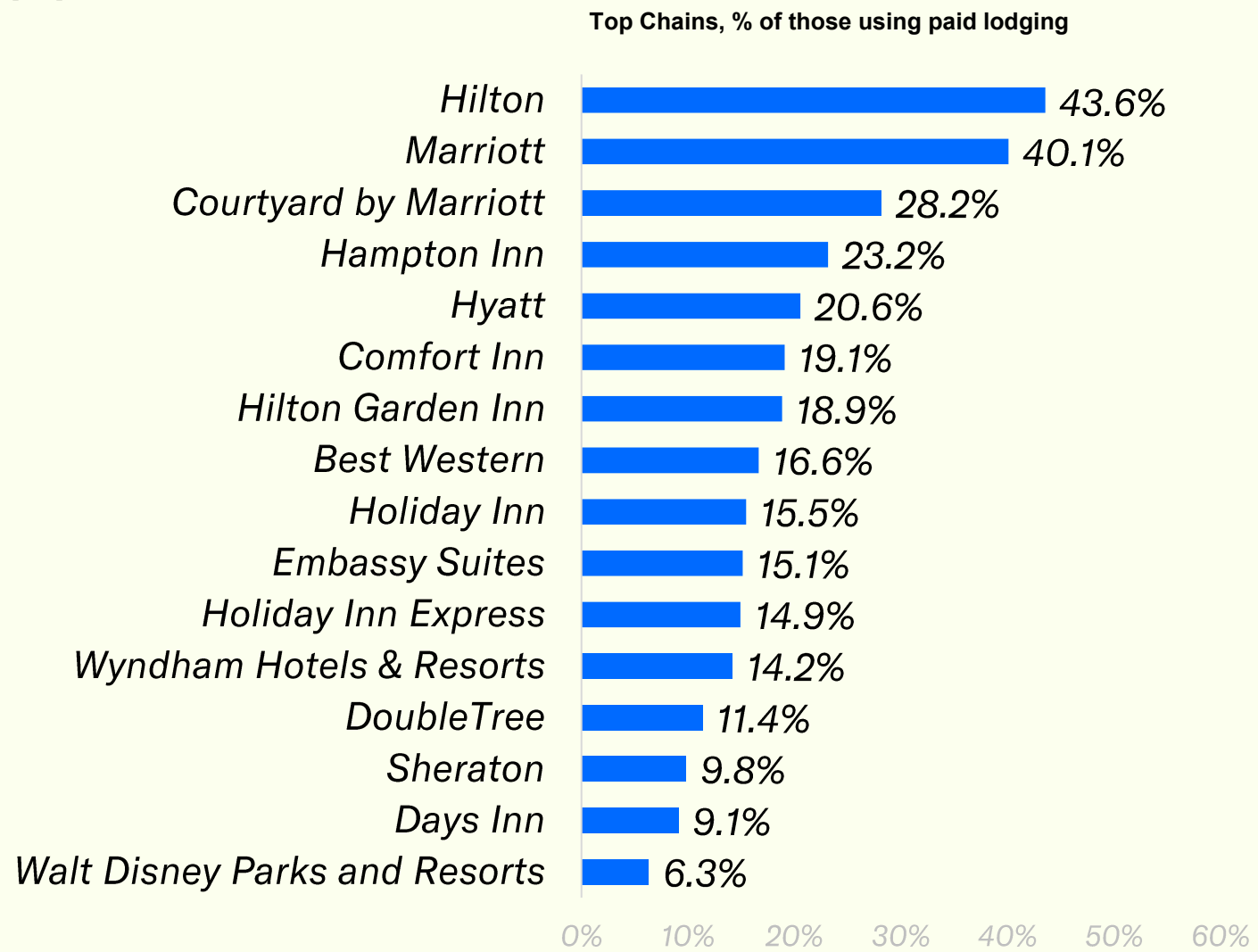


Bottom 5 States



Maybe **Colorado** wants to know what hotel chains these travelers use?

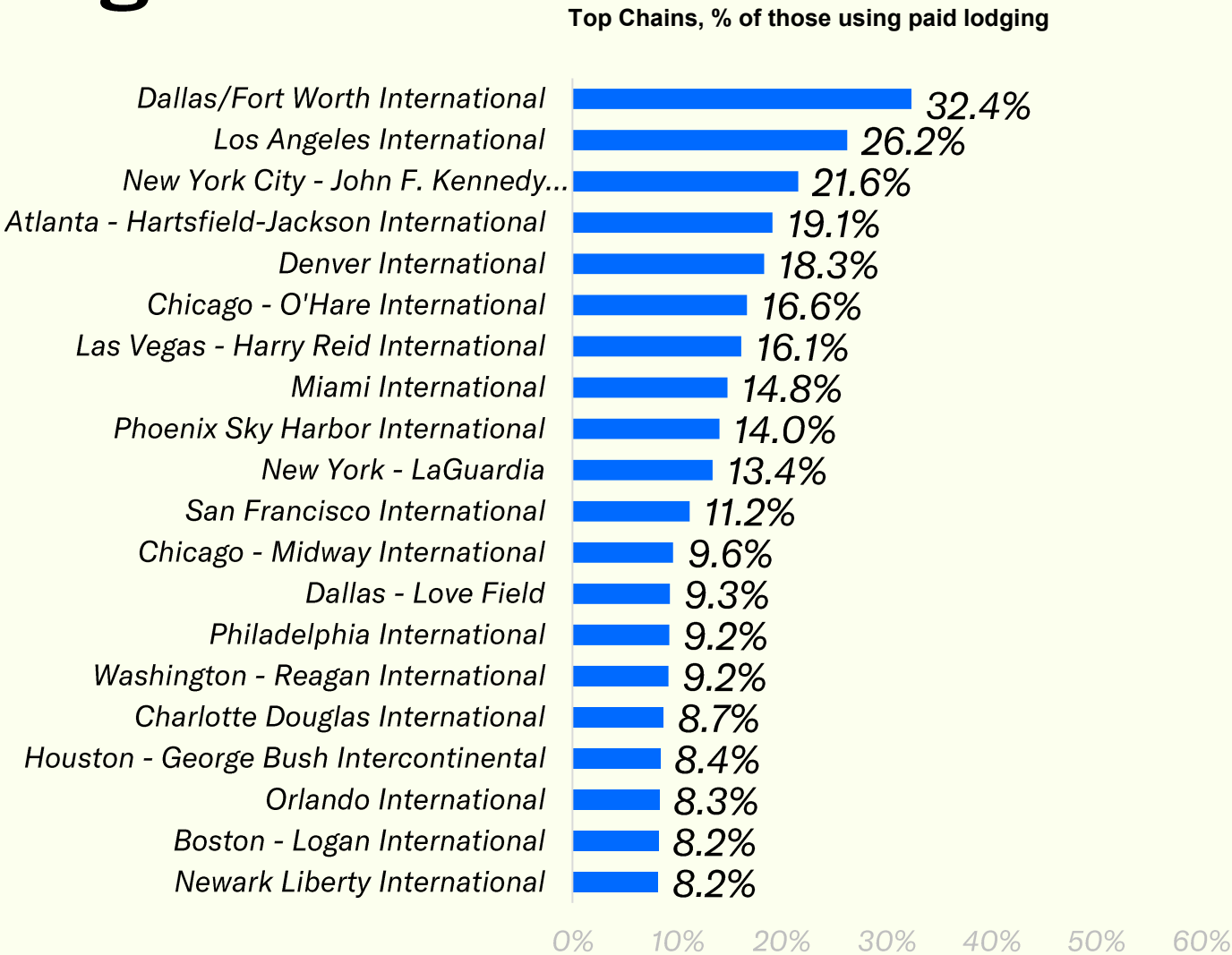
Question:
In the PAST 12 MONTHS, in which of these hotel brands have you stayed?



Maybe **New Mexico** wants to know what airports these travelers pass through?

Question:
In the PAST 12 MONTHS, which of these airports have you used?

(Select any airport you originated in, traveled through or into)



A new perspective on your:

- **Top feeder markets**
- **Detailed media consumption profiles**
- **Travel interests and behaviors**
- **Demographics**

Upcoming Livestreams:

Future Partners & Miles Partnership: The State of the American Traveler Tech Edition - *June 24 at 3pm ET*

*Uncover the latest trends in the
resources travelers rely on for travel
decisions and behaviors*

The Future of the Meetings Industry **2025 Co-op Enrollment Open Now!**

Fuel your meetings strategy with fresh insights from a study of meeting planners

Meeting planner profile (industries serviced, size of meetings, convention center sourcing, age, meeting planner type, etc.)

Trends (what is likely to increase/decrease over the next several years, what new trends do you see emerging in the meeting space)

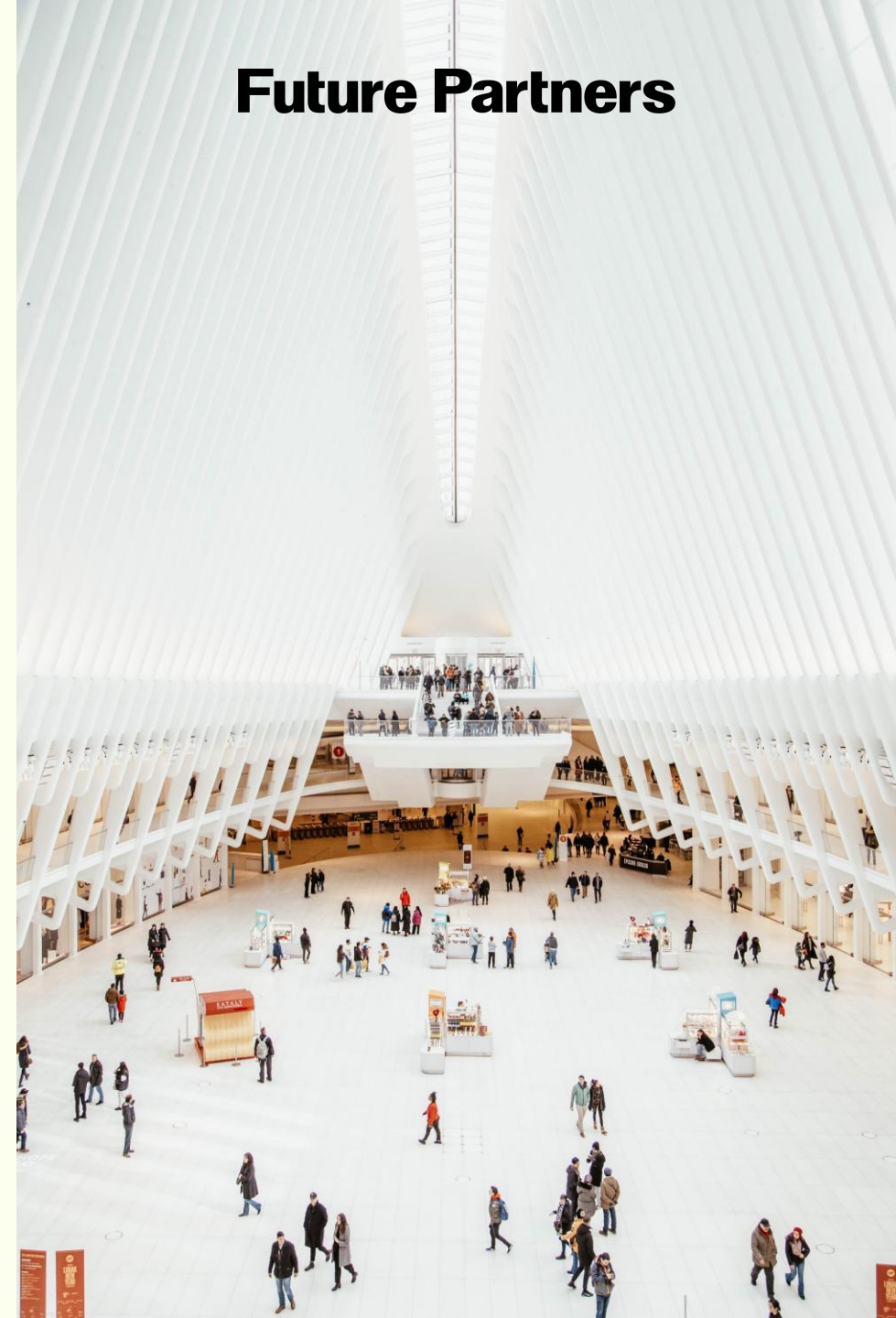
DMO Perceptions (familiarity with DMOs, DMO resources used, what's made for an exceptional partnership with a destination, what do planners need from destination partners now)

Marketing to Meeting Planners (summary of advertising best practices, what types of imagery/information is key to include in destination ads)

Meetings Destination Ratings (rating of all co-op destinations on key attributes like popularity with attendees, financial favorability, hotel product mix, sourced in the past 5 years, likelihood to source in the next 5 years, and more)

Reach out to Jennifer@FuturePartners.com to sign up!

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The State of the International Traveler: Insights to Grow Your Share of International Inbound Visitation

Gain Comprehensive Marketing Insight on the Following Countries:

- Argentina
- Australia
- Brazil
- Canada
- China
- Colombia
- France
- Germany
- India
- Italy
- Japan
- Mexico
- The Netherlands
- South Korea
- Spain
- 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%), and Japan (23.4%).

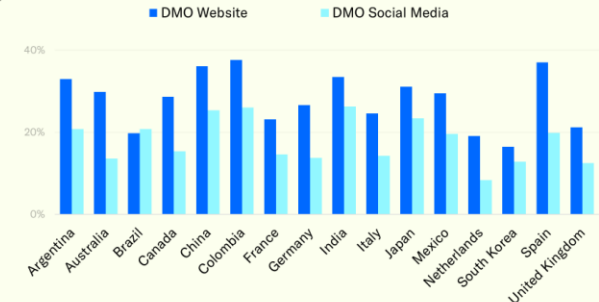
Use of DMO Websites
(% who would use for planning)

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



Let's keep the conversation going



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