

Future Partners

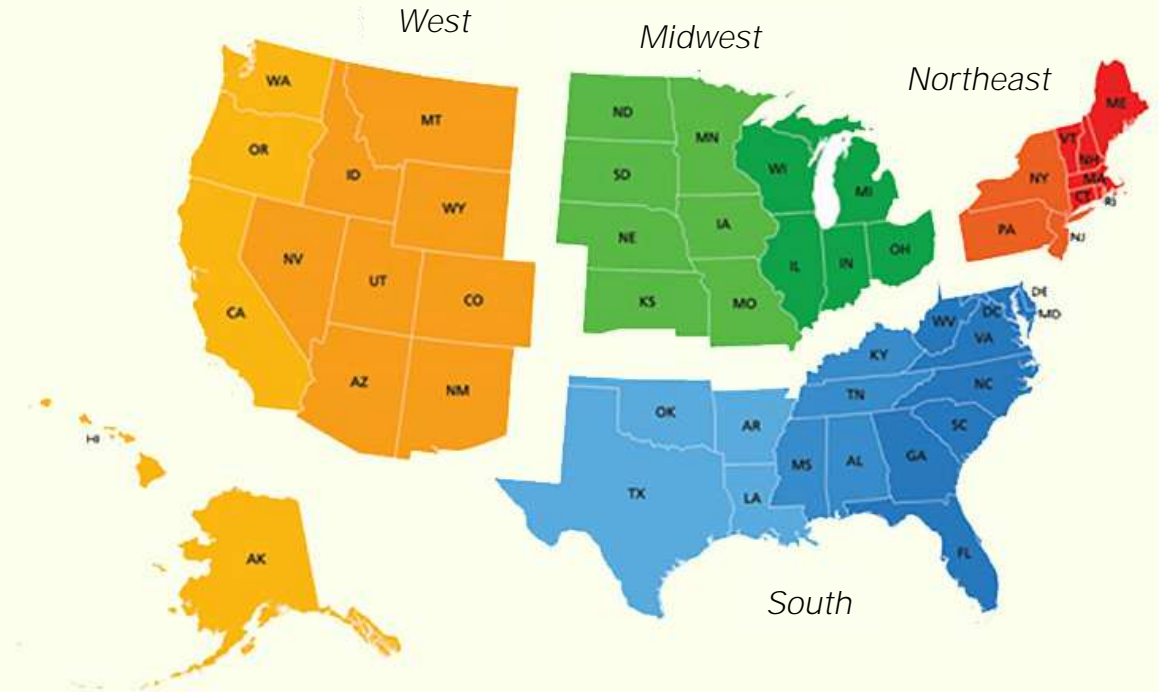
The State of the American Traveler

August 2025

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 [July 16-28](#)*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*
- *All data (including historic) is available on-demand with subscription to the Insights Explorer*

United States Census Regions



Today

- Travel Sentiment Overview
- Expectations for Fall Travel
- Resilient by Design: Turning Crises into Strategic Momentum

An aerial night photograph of a city, likely San Francisco, showing the Golden Gate Bridge and surrounding urban areas with lights reflecting on the water. The image is used as a background for the text.

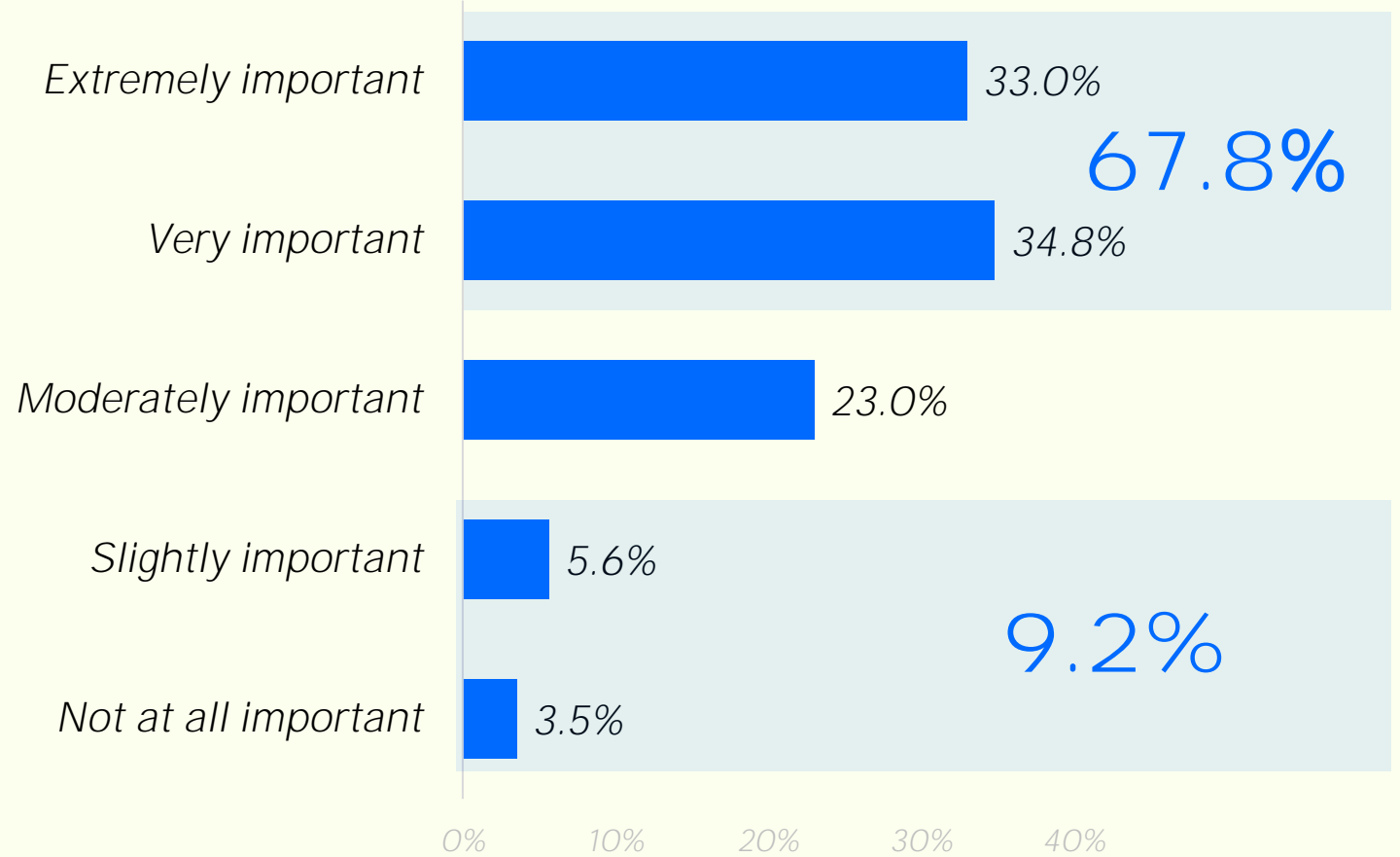
Presentation deck and
recording will be available on
our website:

FuturePartners.com

Wellness is critical to many American travelers, and an important reason they travel

Question:

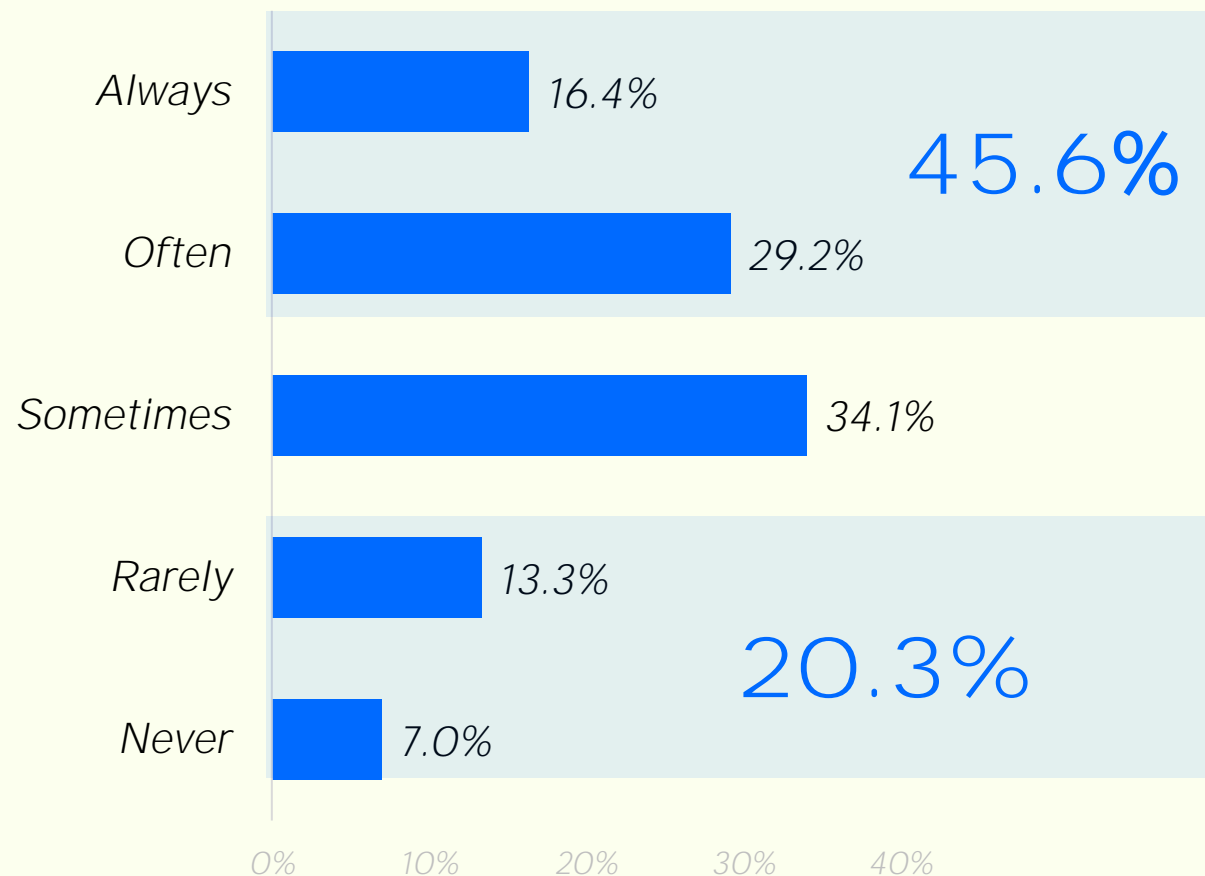
Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being?



More than 45% of American travelers often or always plan their trip specifically to support their wellness

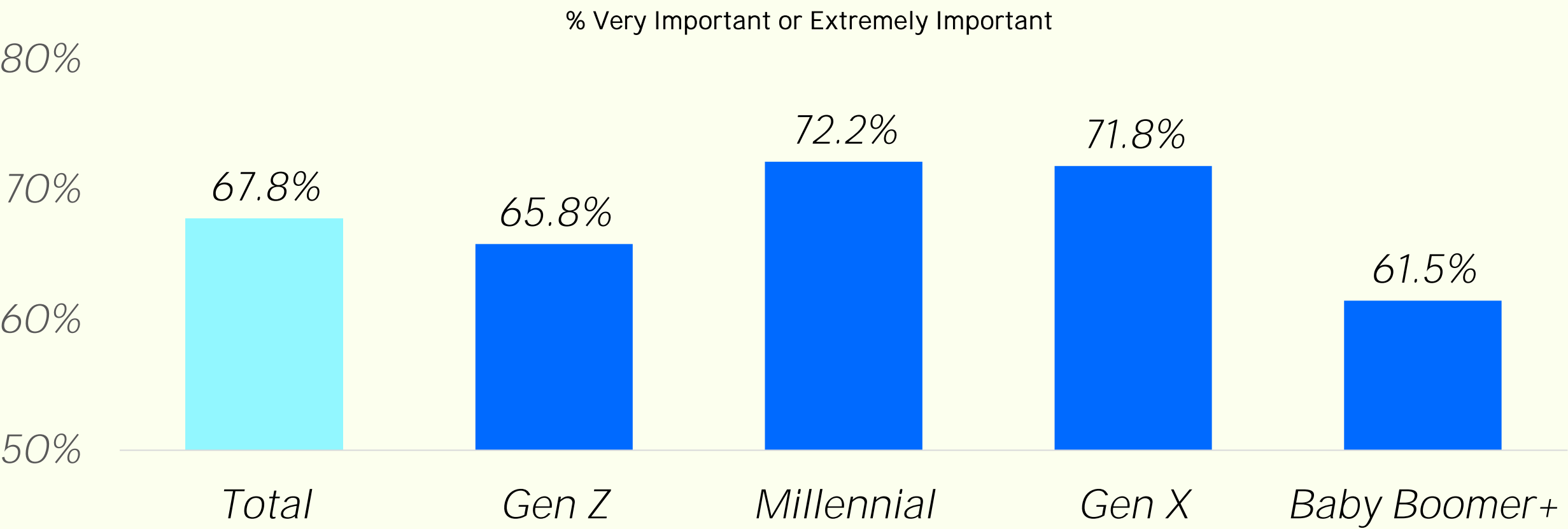
Question:

How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?



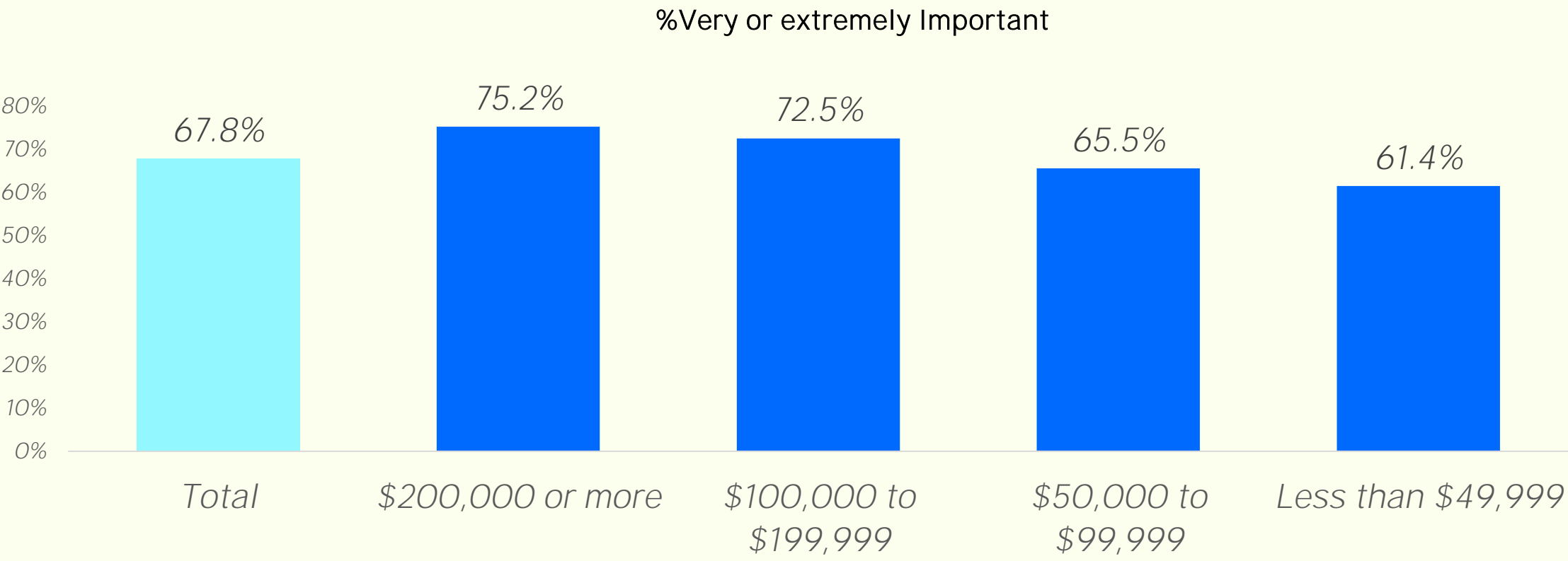
Wellness is most motivational to Millennial and GenX travelers

Question: *Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)*



The importance of wellness to travel increases with income

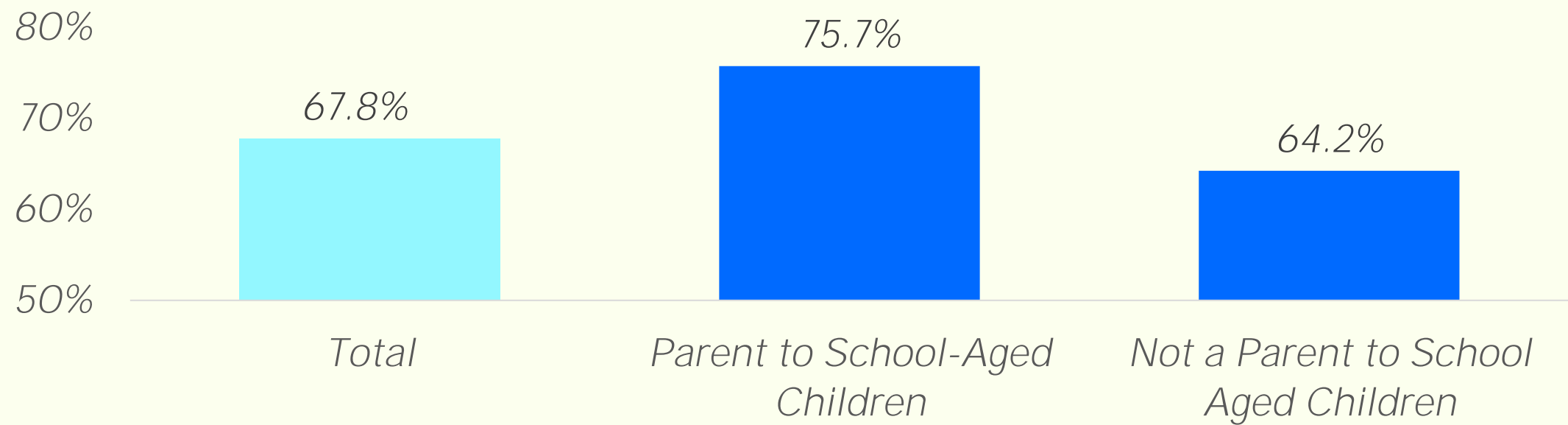
Question: *Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)*



More than 75% of parents to school-age children consider wellness important to their travel

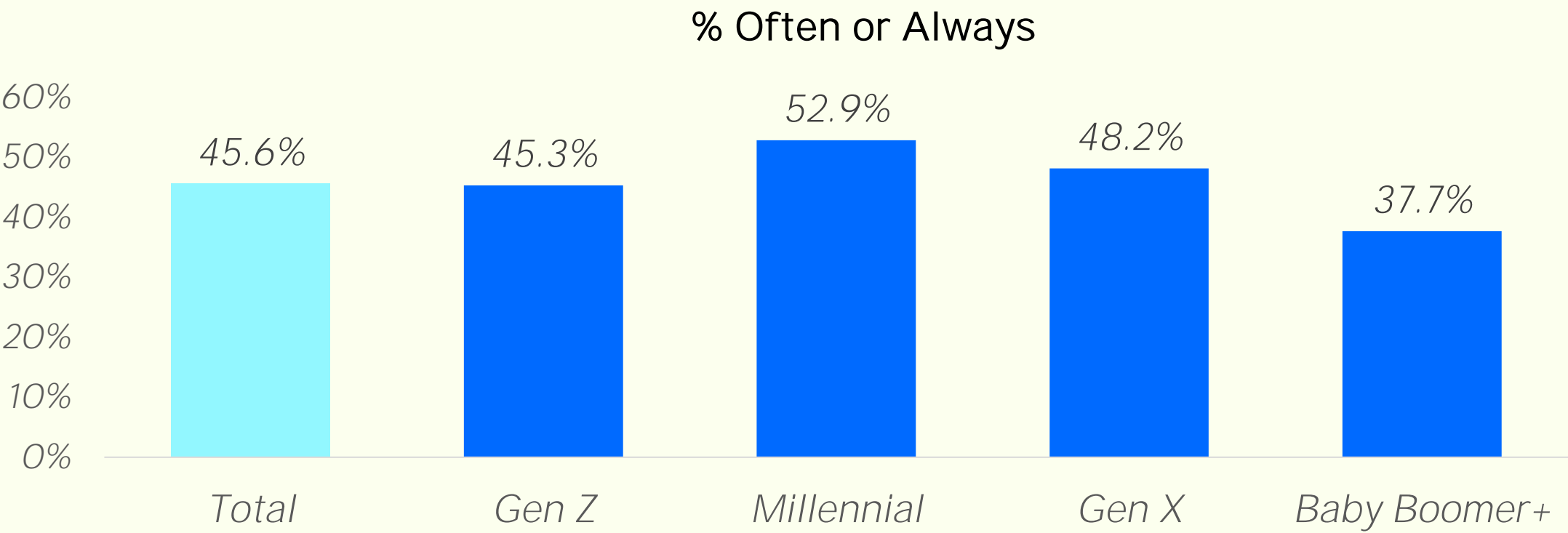
Question: *Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)*

% Very Important or Extremely Important



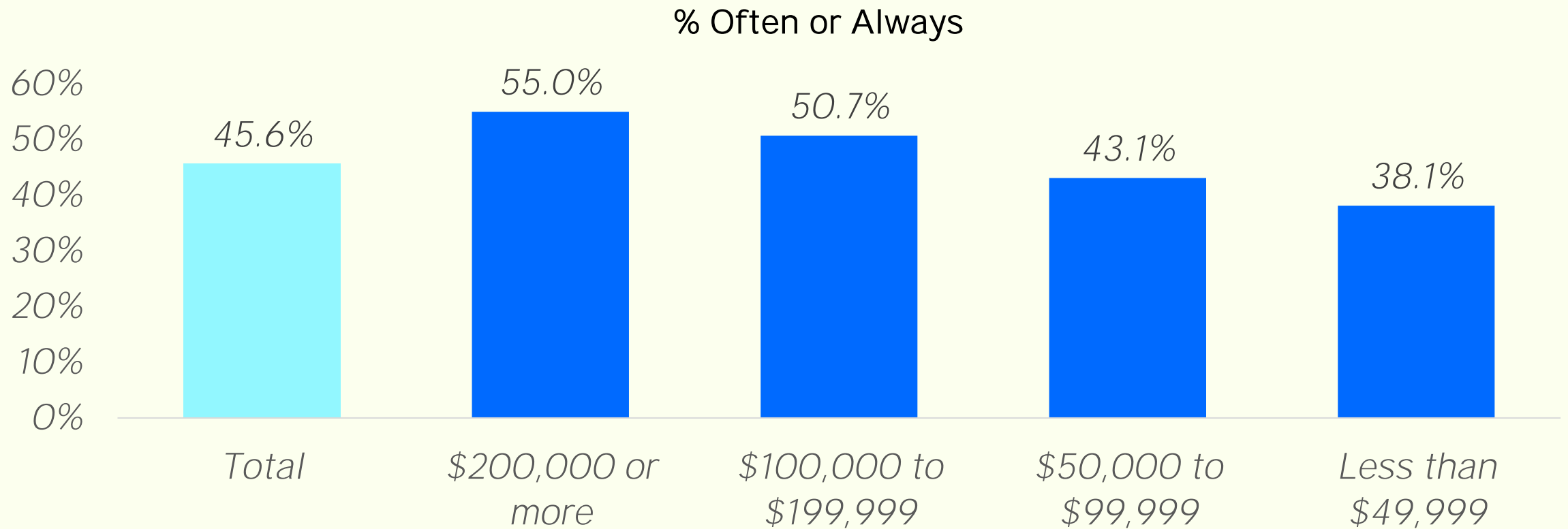
Millennial and GenX-age travelers most frequently plan trips to support wellness

Question: *How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?*



More than half of travelers with HHI >\$100K often or always plan trips to support their wellness

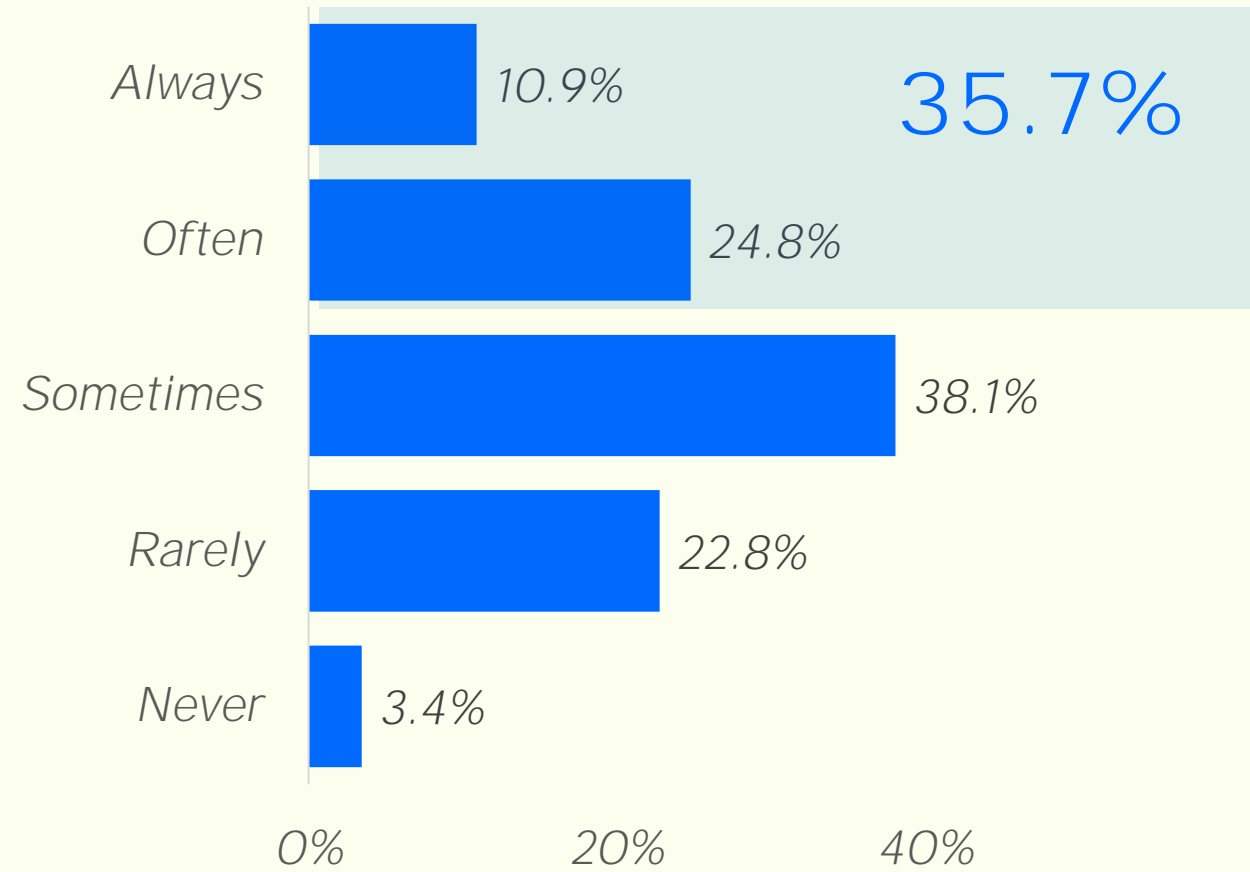
Question: *How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?*



More than one-third of American travelers say they often or always feel elevated levels of stress in their daily lives

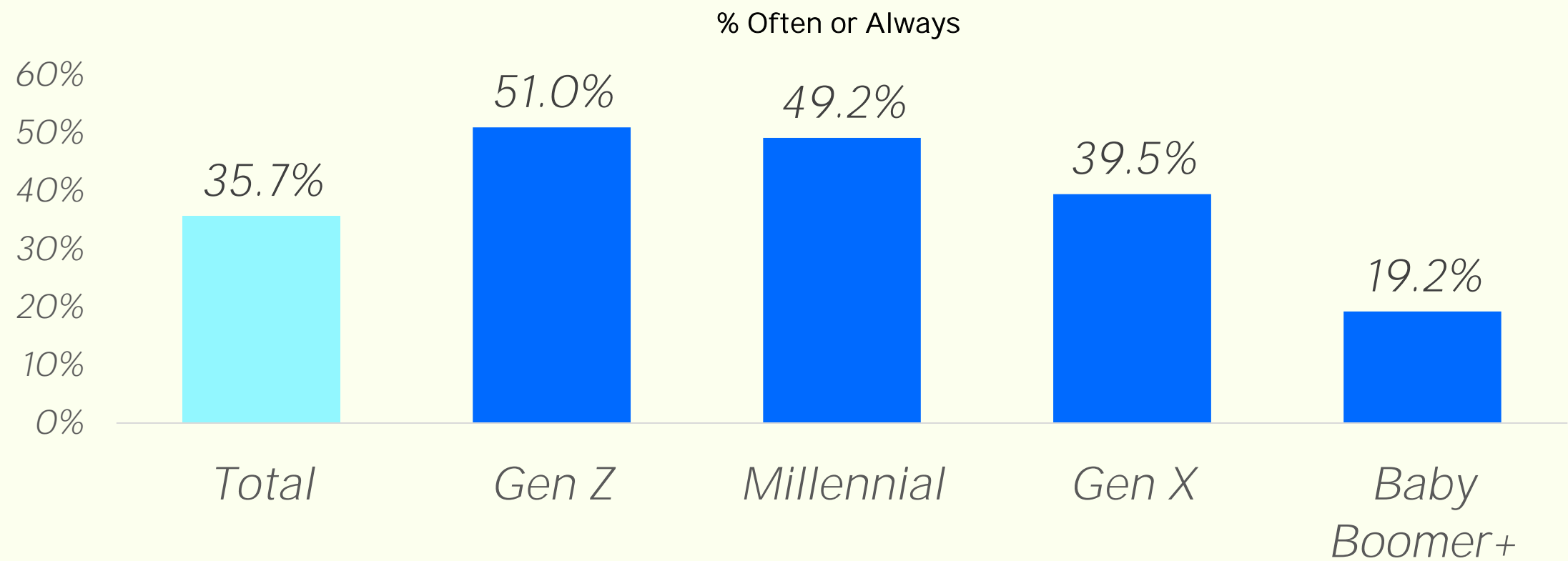
Question:

How often do you feel elevated levels of stress in your day-to-day life?



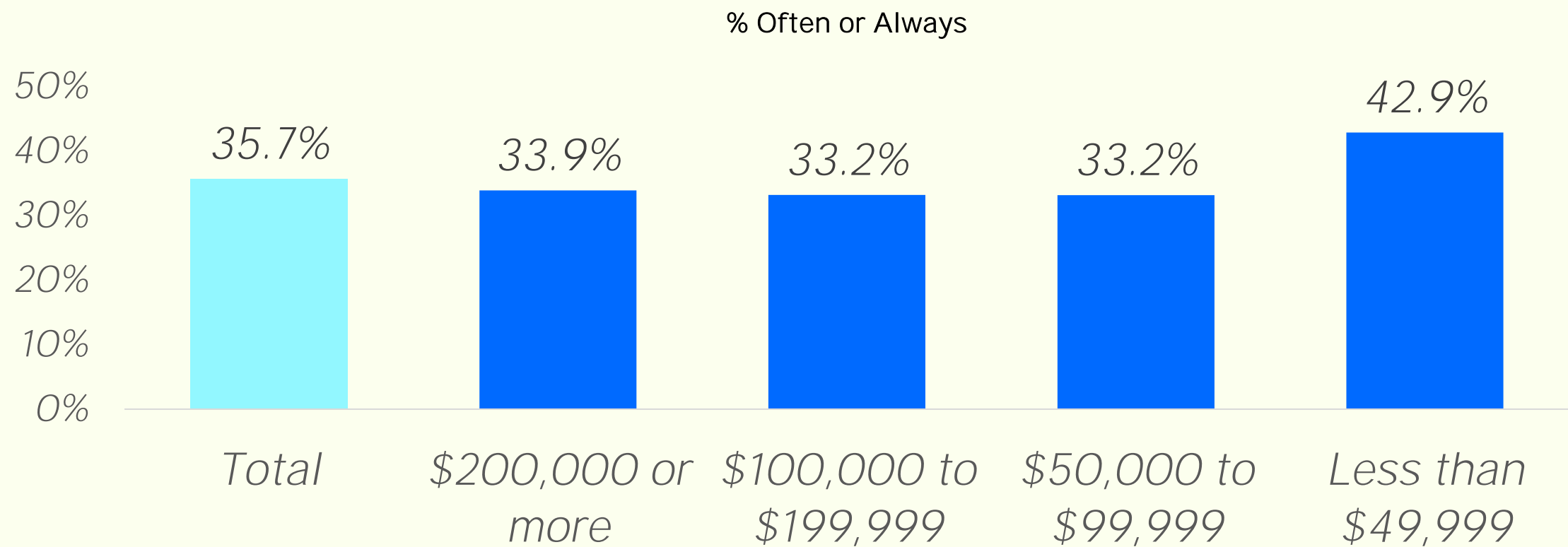
Younger travelers are likely to frequently feel stress in their day-to-day lives

Question: *How often do you feel elevated levels of stress in your day-to-day life?*



Stress is much higher in the <\$50K HHI traveler segment

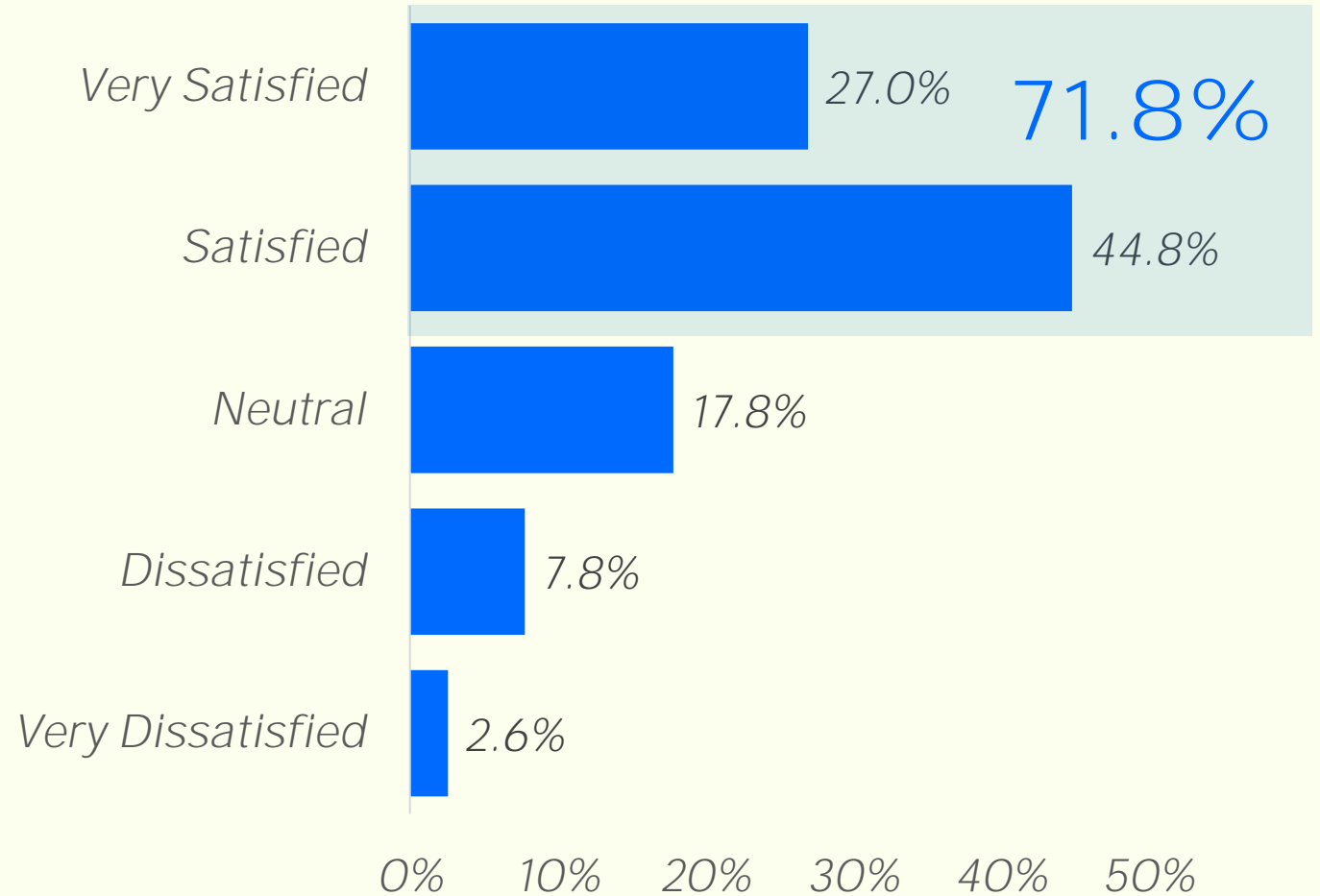
Question: *How often do you feel elevated levels of stress in your day-to-day life?*



The majority of American travelers feel satisfied with their life right now

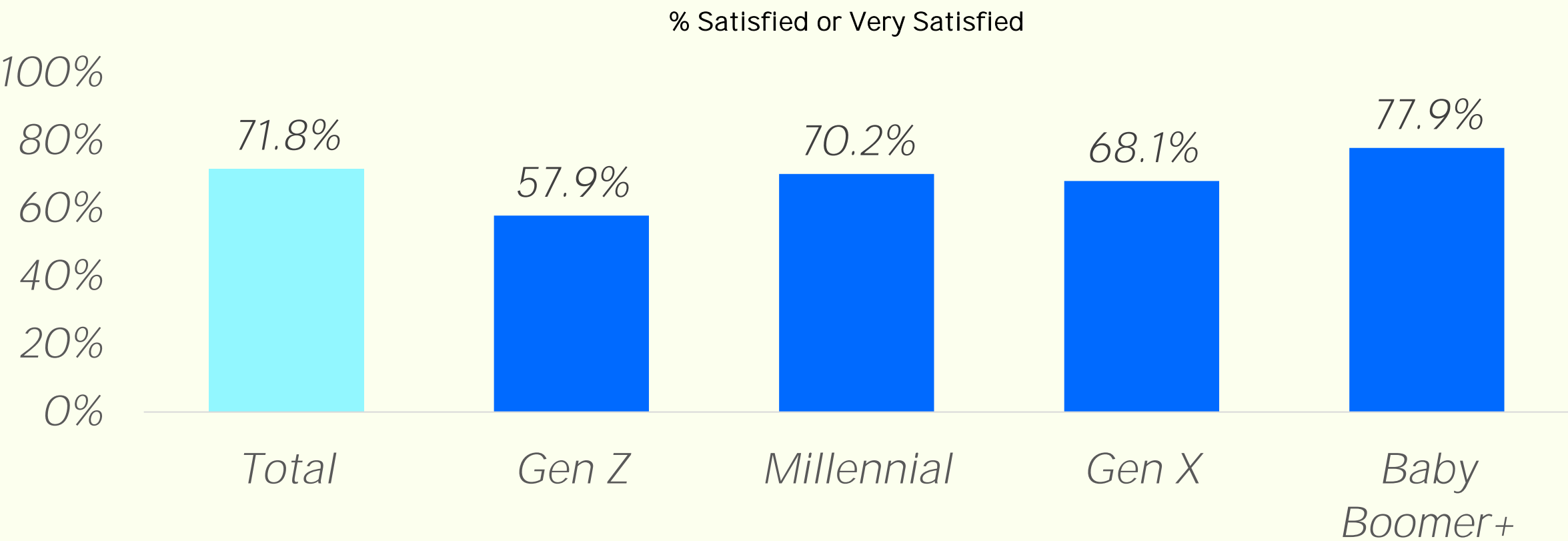
Question:

How satisfied are you with your life right now?



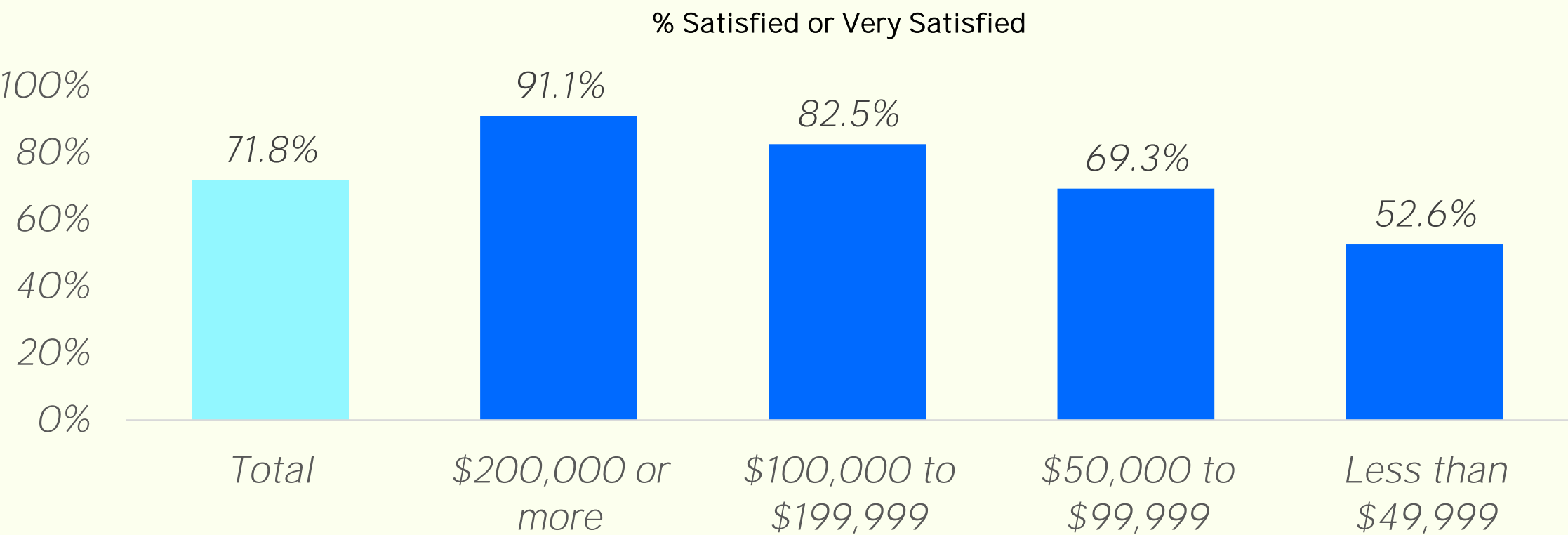
Boomer-aged travelers, followed by Millennials are the most satisfied with their lives

Question: *How satisfied are you with your life right now?*



Money may not buy happiness...but it looks to buy personal satisfaction

Question: *How satisfied are you with your life right now?*



A woman wearing a wide-brimmed straw hat and a dark green one-piece swimsuit is sitting on the edge of a rectangular swimming pool. She is holding a small glass of white wine in her right hand. The pool is set within a traditional Moroccan courtyard. The walls are a warm terracotta color with white arched doorways and windows. A large, leafy green tree stands in the background. The pool's edge is decorated with a pattern of small green and white tiles. In the foreground, there are pink and orange cushions on a low wall. The overall atmosphere is peaceful and luxurious.

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**Traveler
Sentiment**

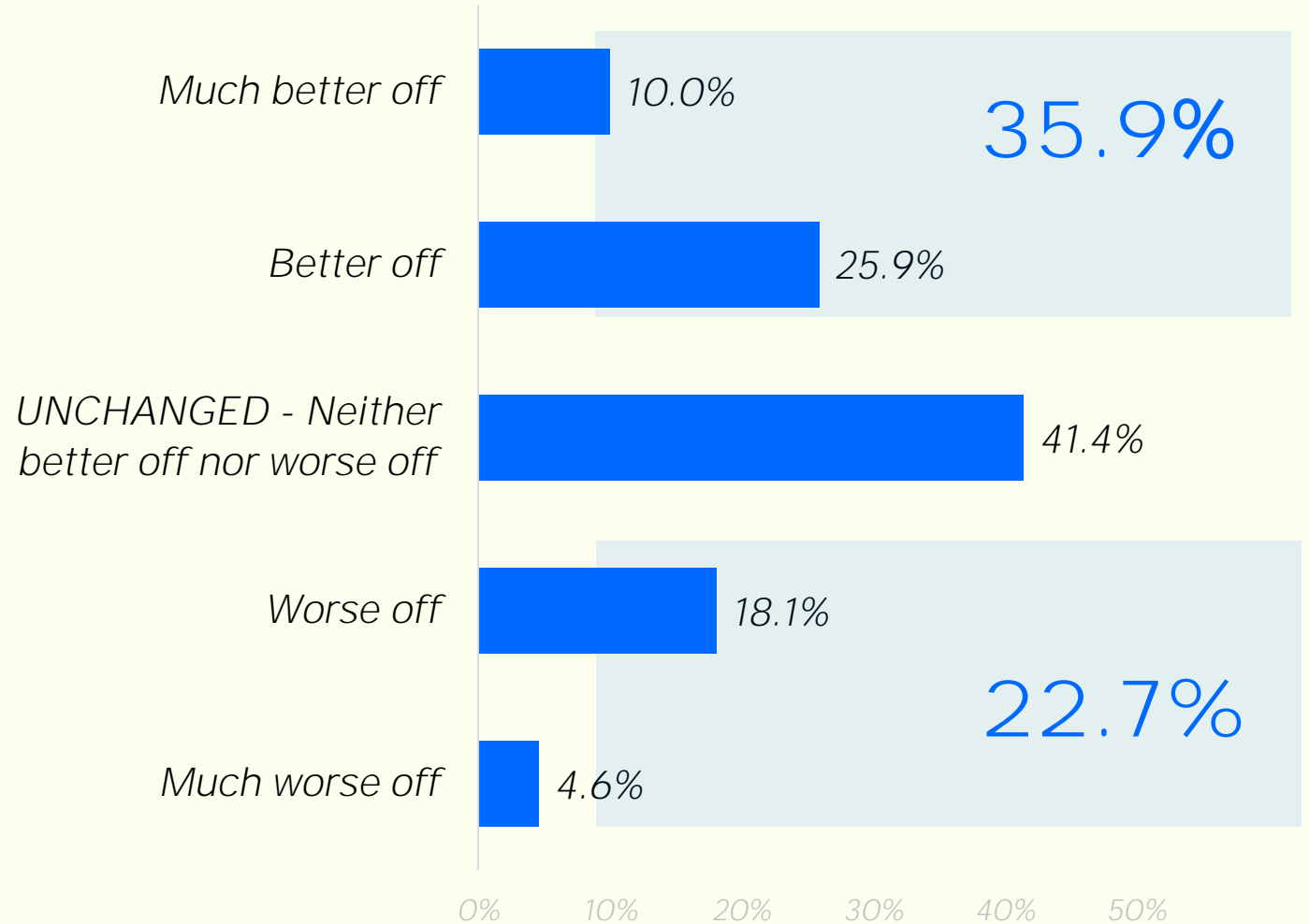
What the Data Tells Us about the American Travel Consumer

- American travelers are feeling some improvements in their current financial sentiment
- Excitement to travel for leisure remained at near-record levels
- However, several sentiment tracking metrics softened slightly this month, including their financial outlook (next 12 months), confidence that “now is a good time to spend” on leisure travel and the prioritization of travel in family budgets.
- While expectations that the US economy will fall into a recession this year decreased slightly from the previous month, 2-in-3 American travelers expect to change their behaviors due to economic conditions.
- Fall travel appears to be on course to match last year’s performance.

Over 35% of American travelers feel their current financial situation is better than it was a year prior

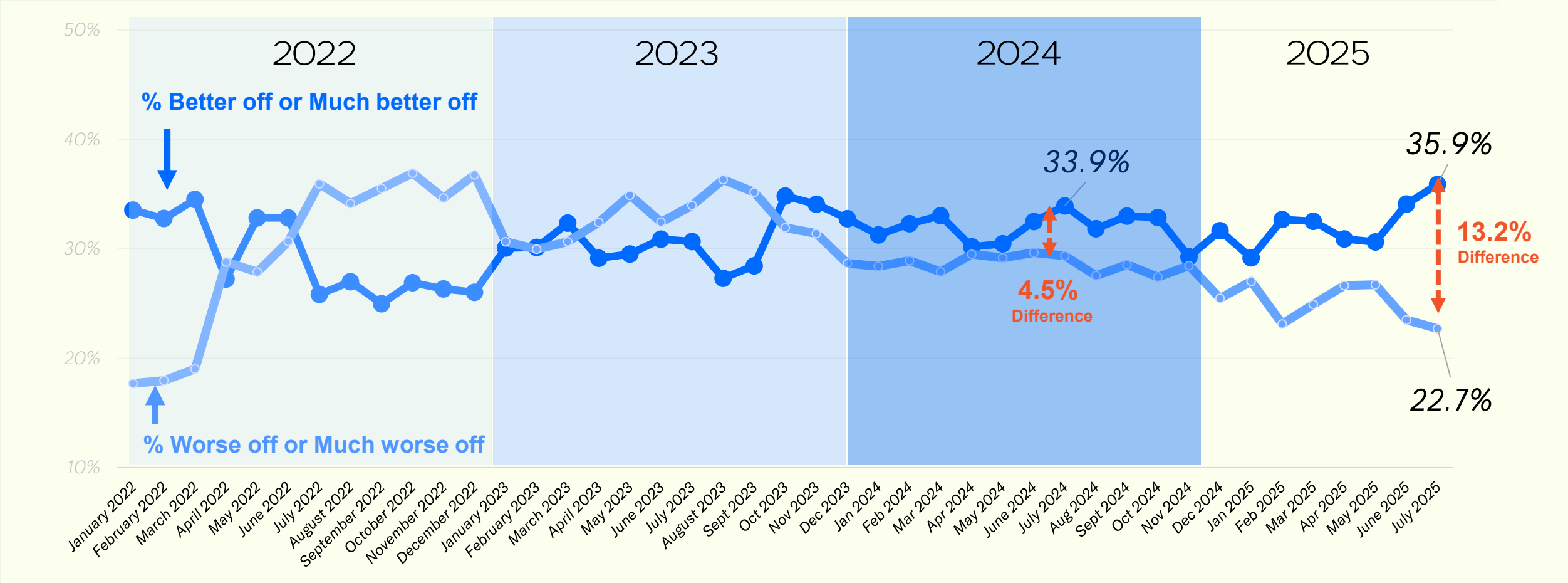
Question:

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



American travelers' feelings about their current financial situation improved again this month and is up year-over-year

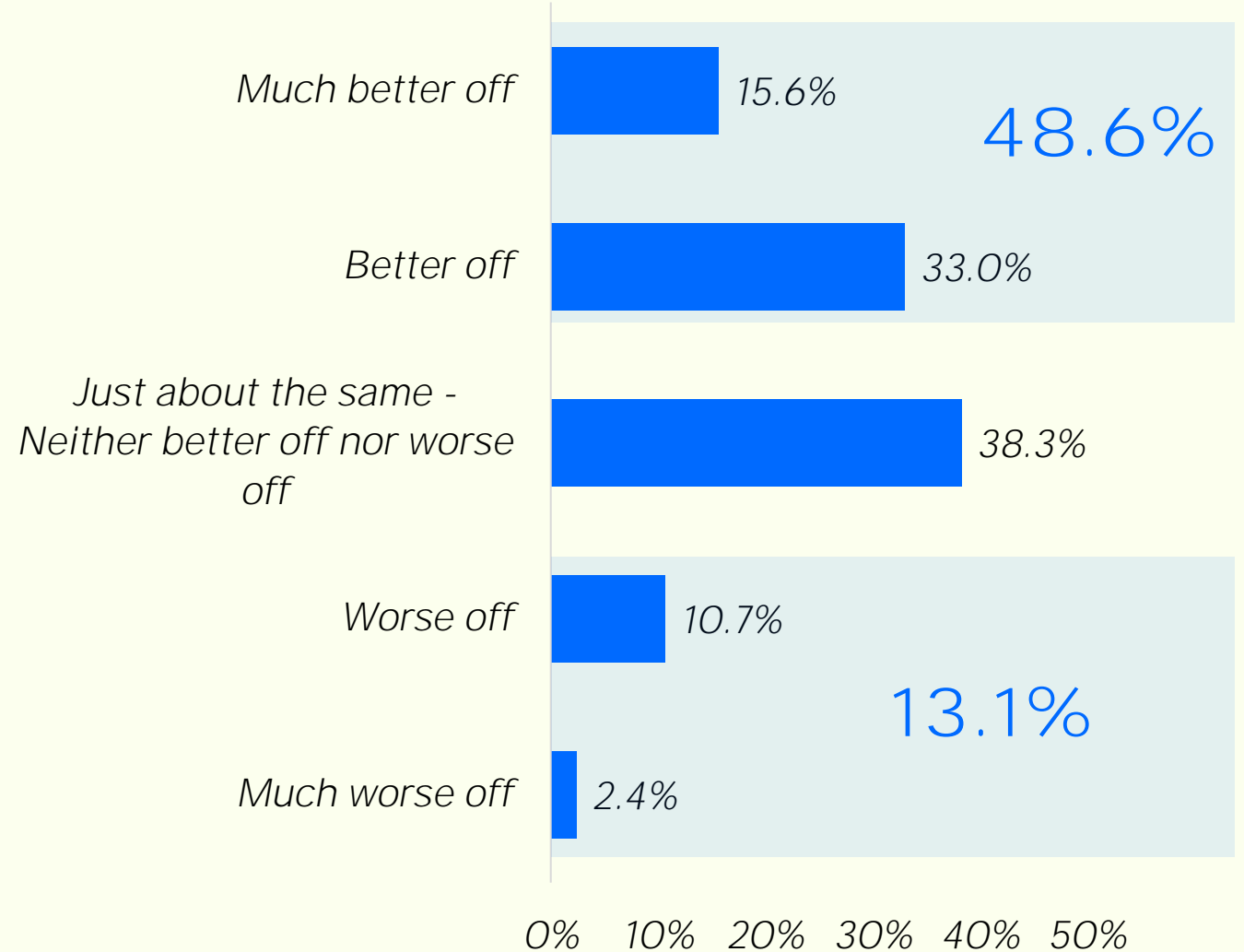
Question: *Would you say that you (and your household) are better off or worse off financially than you were a year ago?*



Nearly half of American travelers feel they will be financially better off next year compared to now

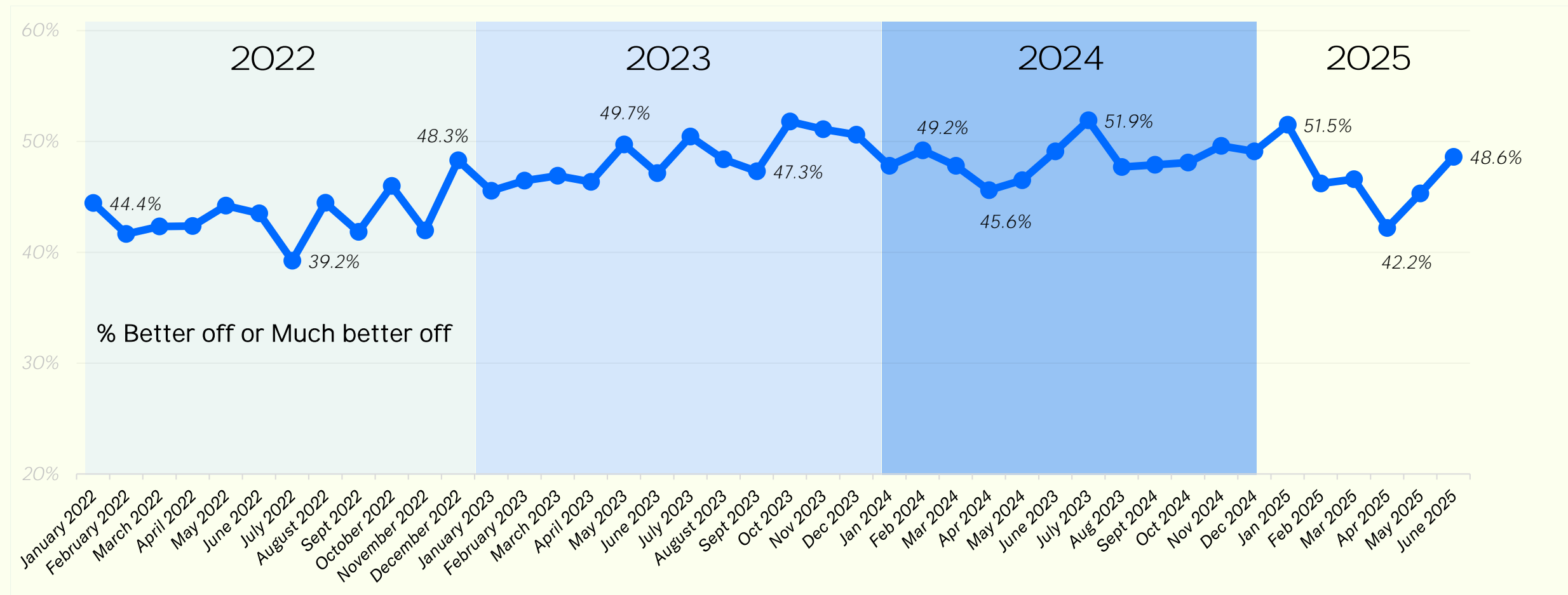
Question:

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?



Travelers again reported 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?*





PERSONAL FINANCE

Credit card debt reaches \$1.21 trillion — in line with last year's all-time high, NY Fed finds

PUBLISHED TUE, AUG 5 2025•12:56 PM EDT | UPDATED TUE, AUG 5 2025•2:49 PM EDT

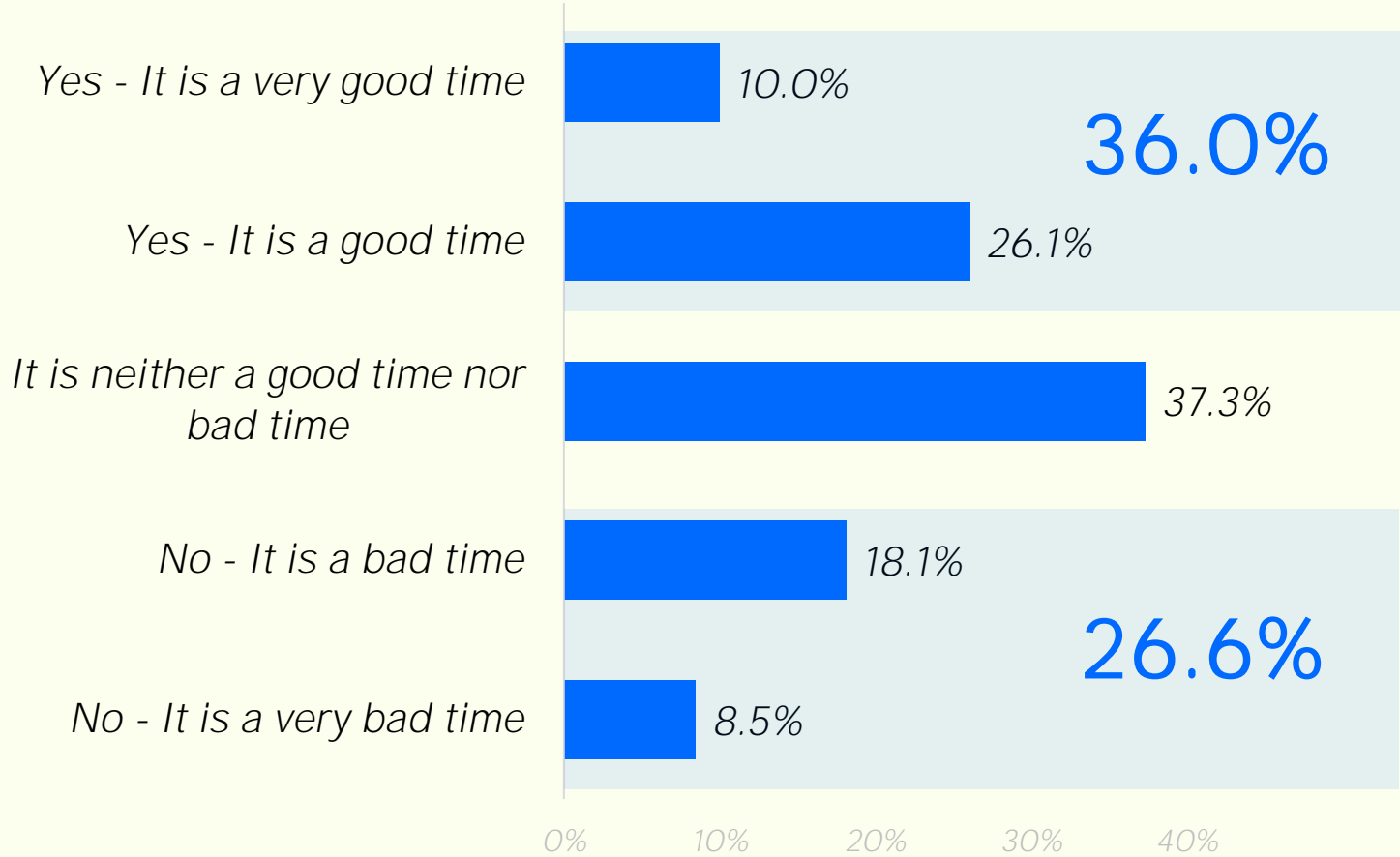


Jessica Dickler
@JDICKLER

“I think most people are generally doing OK, but it wouldn’t take much for them to not be OK,” said Matt Schulz, chief credit analyst at LendingTree. “So many Americans are a job loss, income reduction or medical emergency away from real financial trouble.”

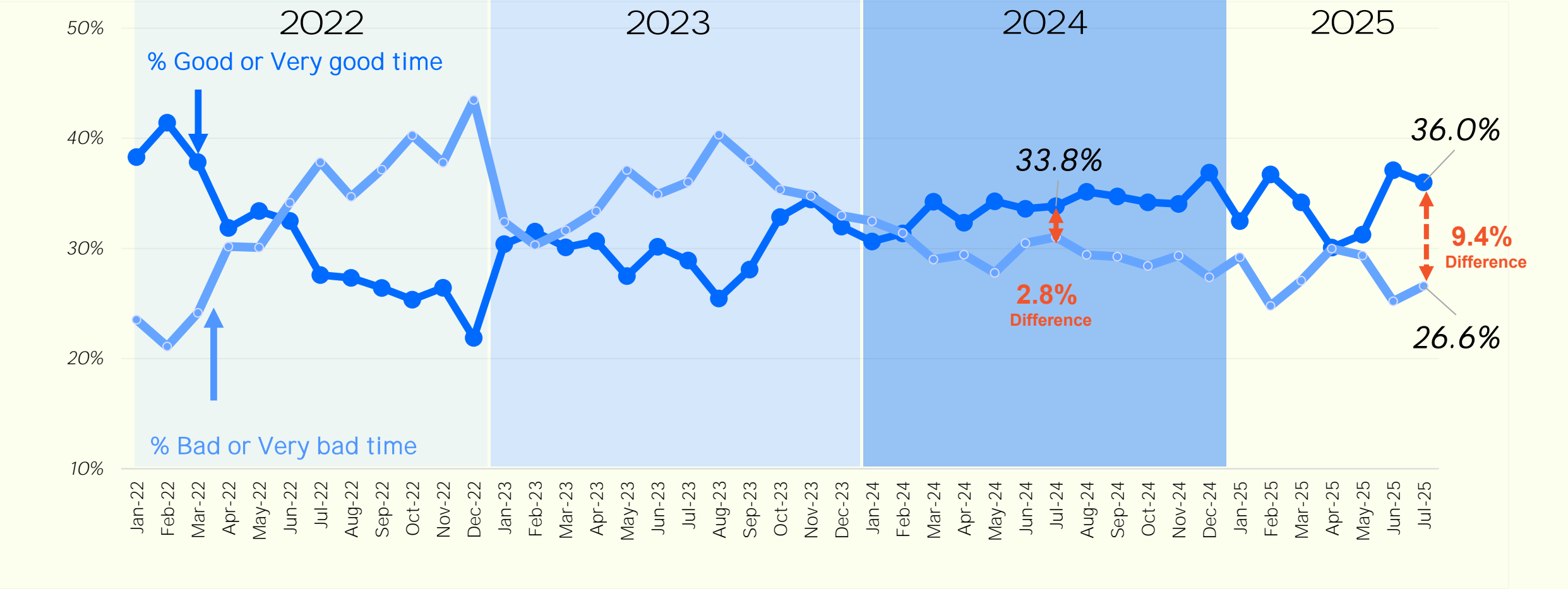
36% of American travelers feel that now is a good time to spend on leisure travel

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?



Confidence that now is a good time to spend on leisure travel regressed by 1 point, although is performing above 2024

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?

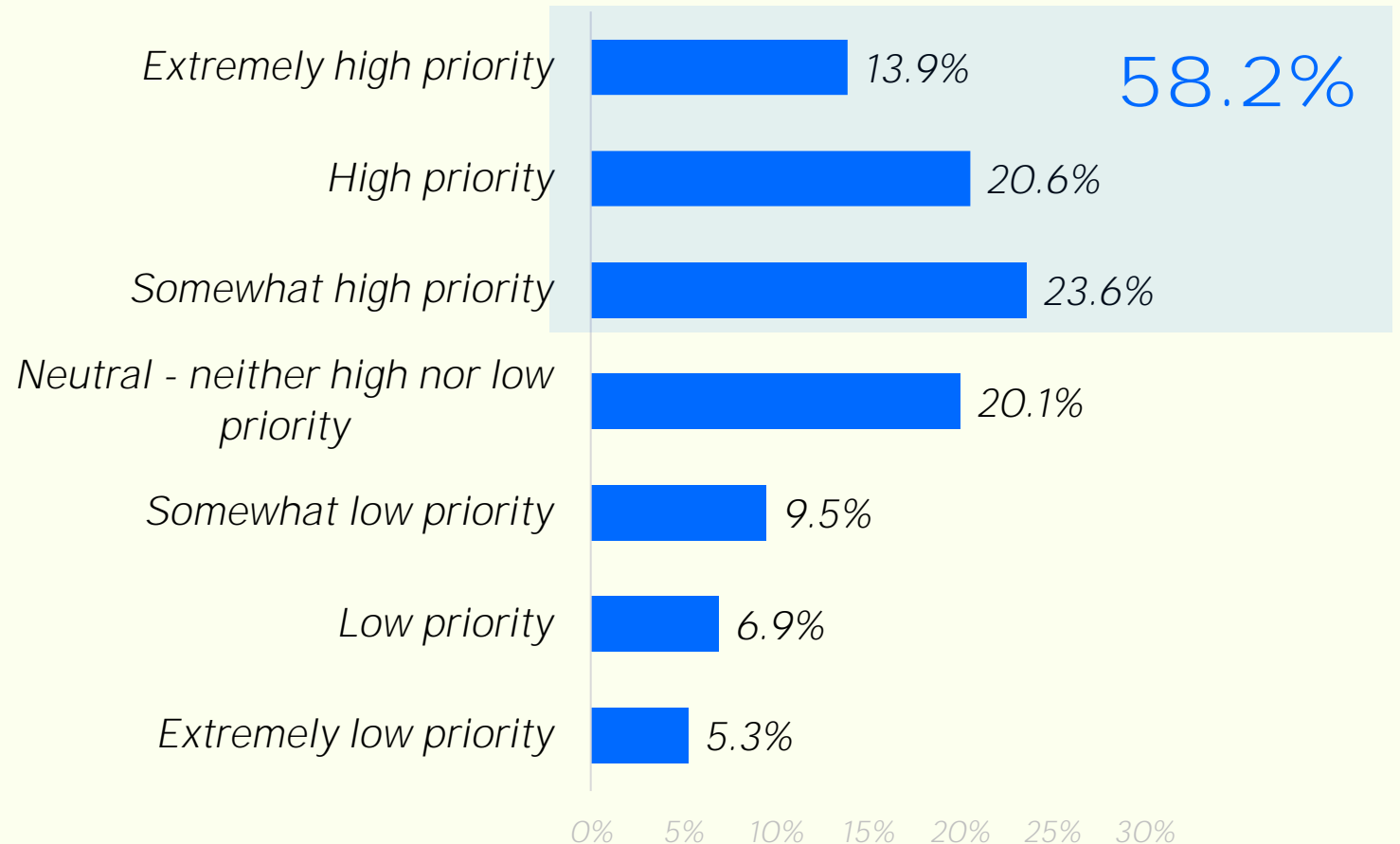


Over 58% of American travelers intend to make travel a budget priority in the near-term

Question:

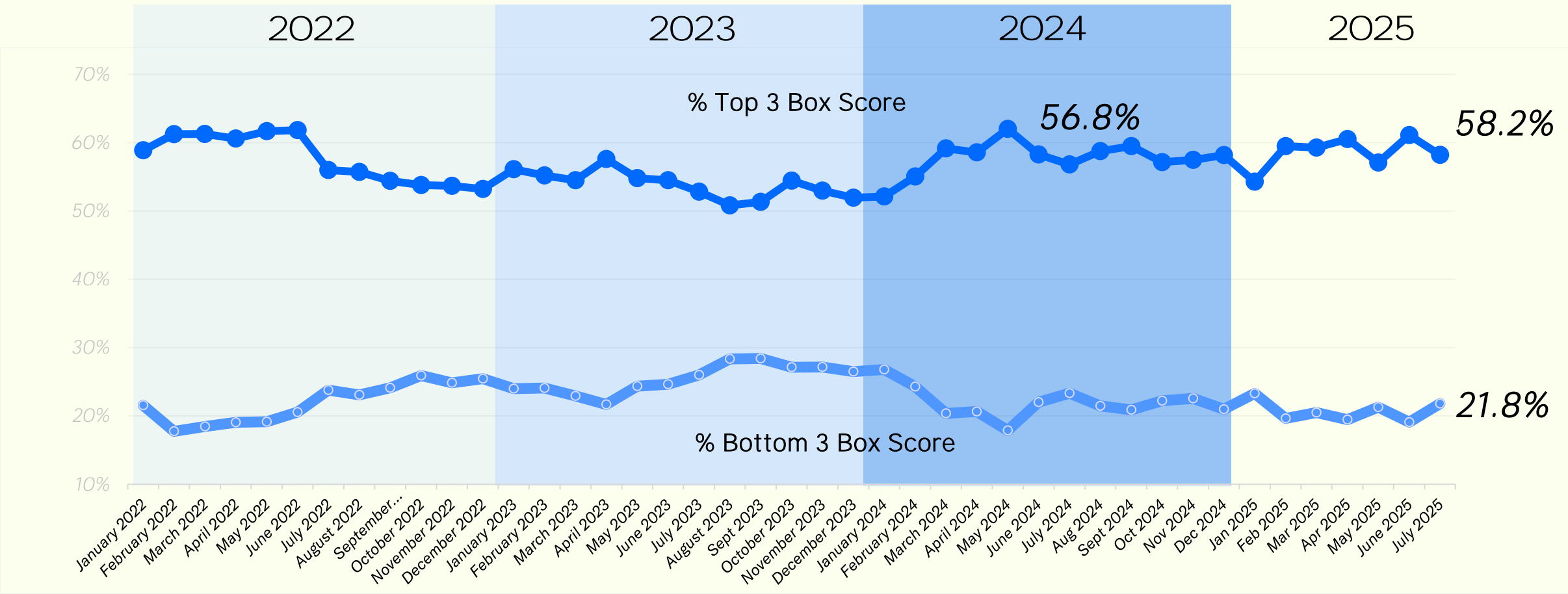
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.



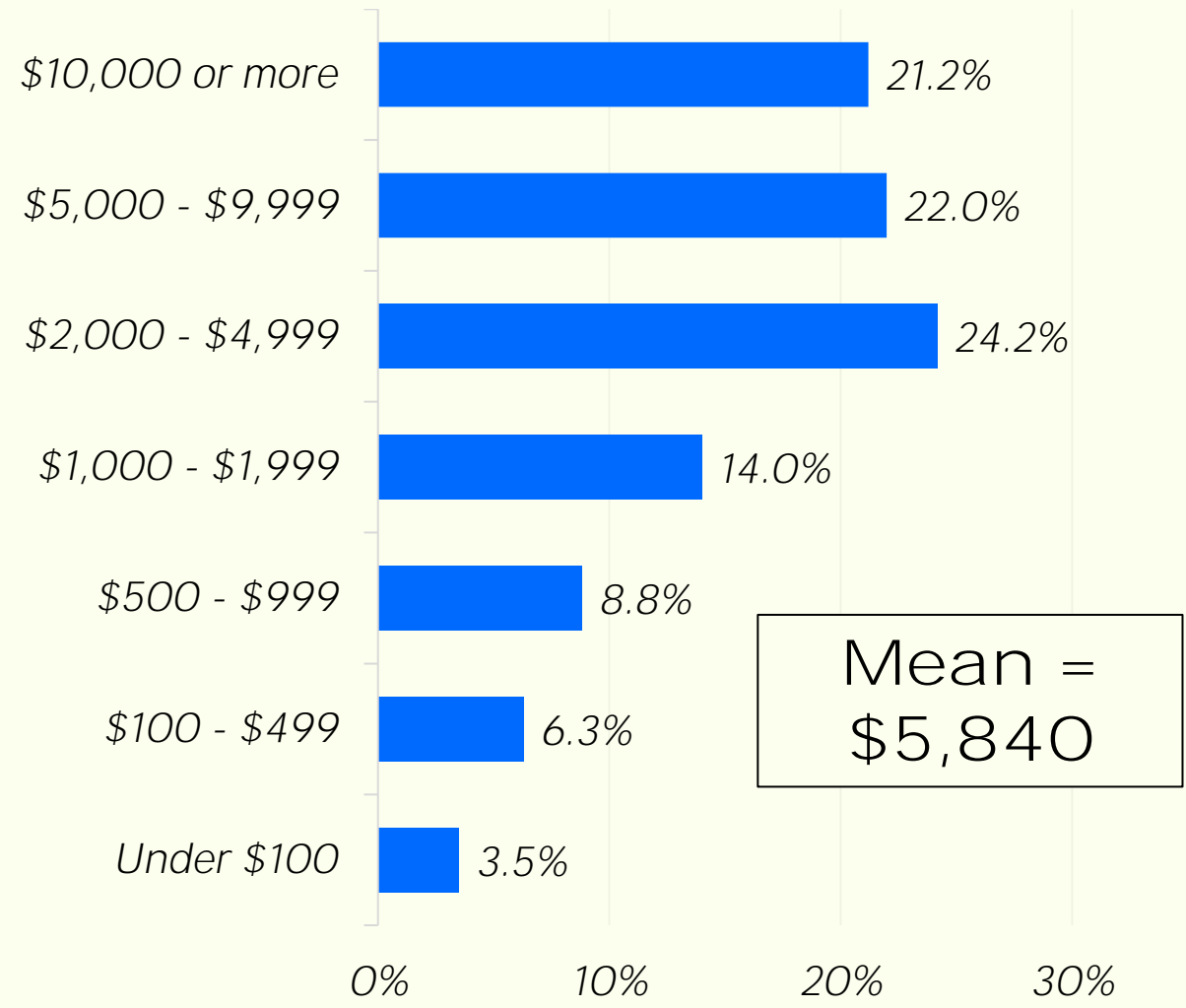
While travel as a budget priority declined from last month, this metric remains slightly higher than 2024

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) _____.



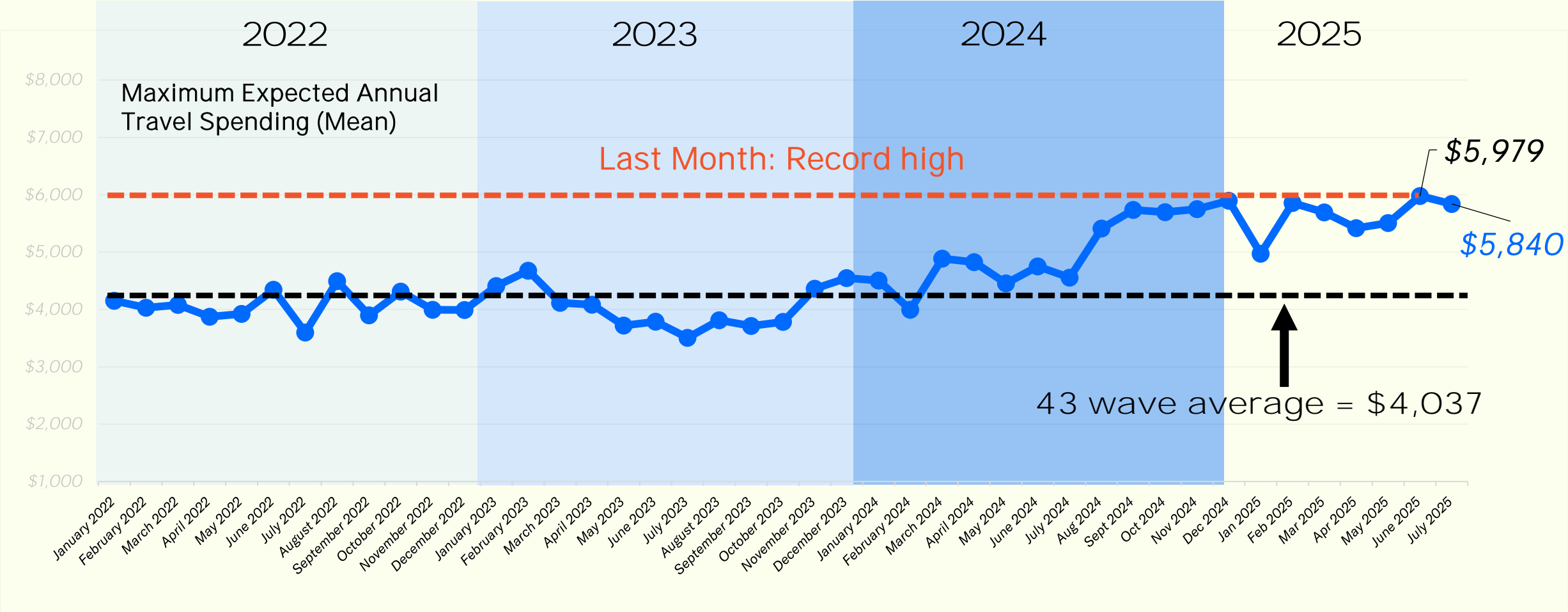
Expected annual travel budgets are at an average of \$5,840

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?



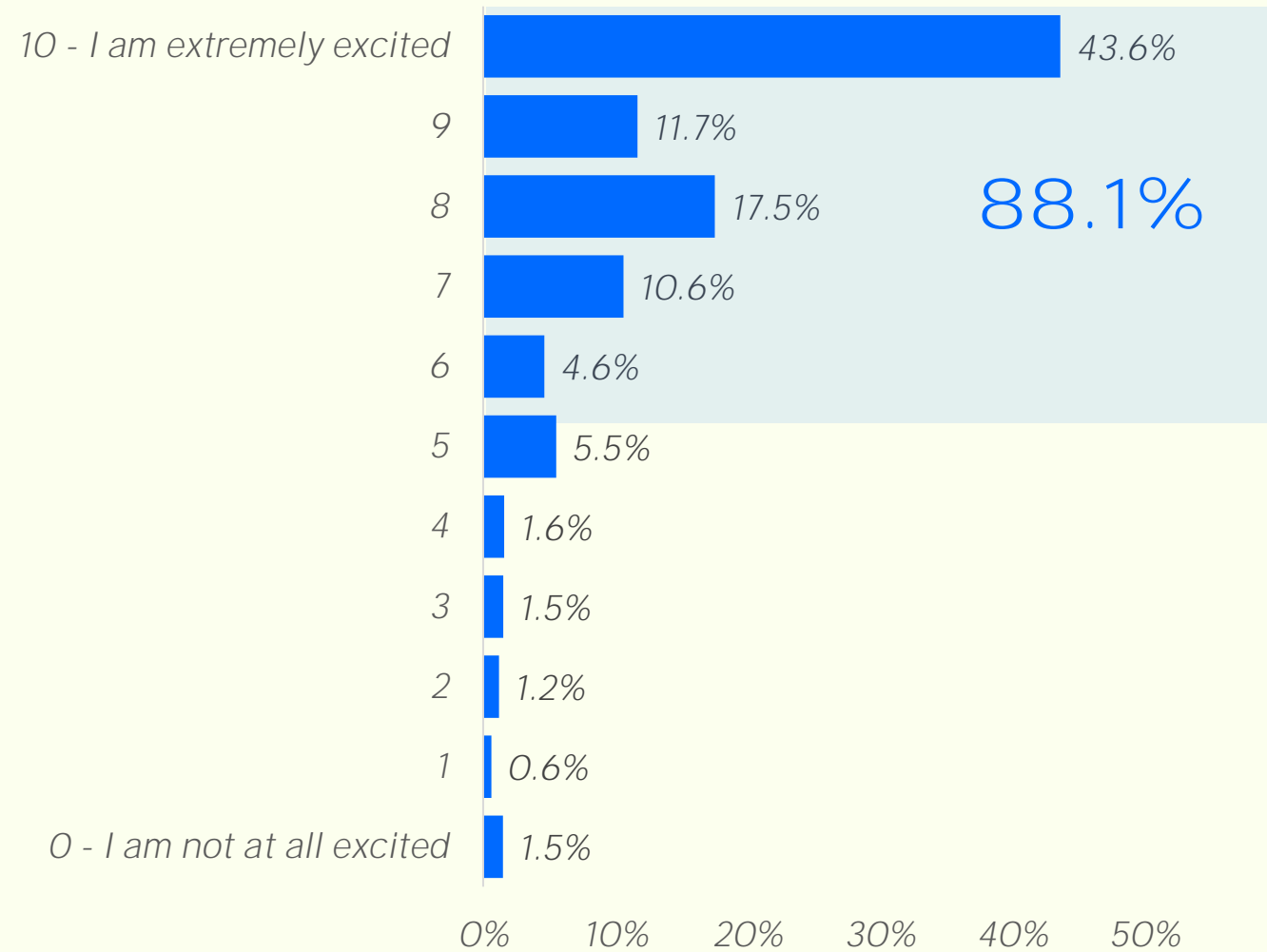
Expected annual travel budgets are down slightly from last month's record but remain strong.

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):



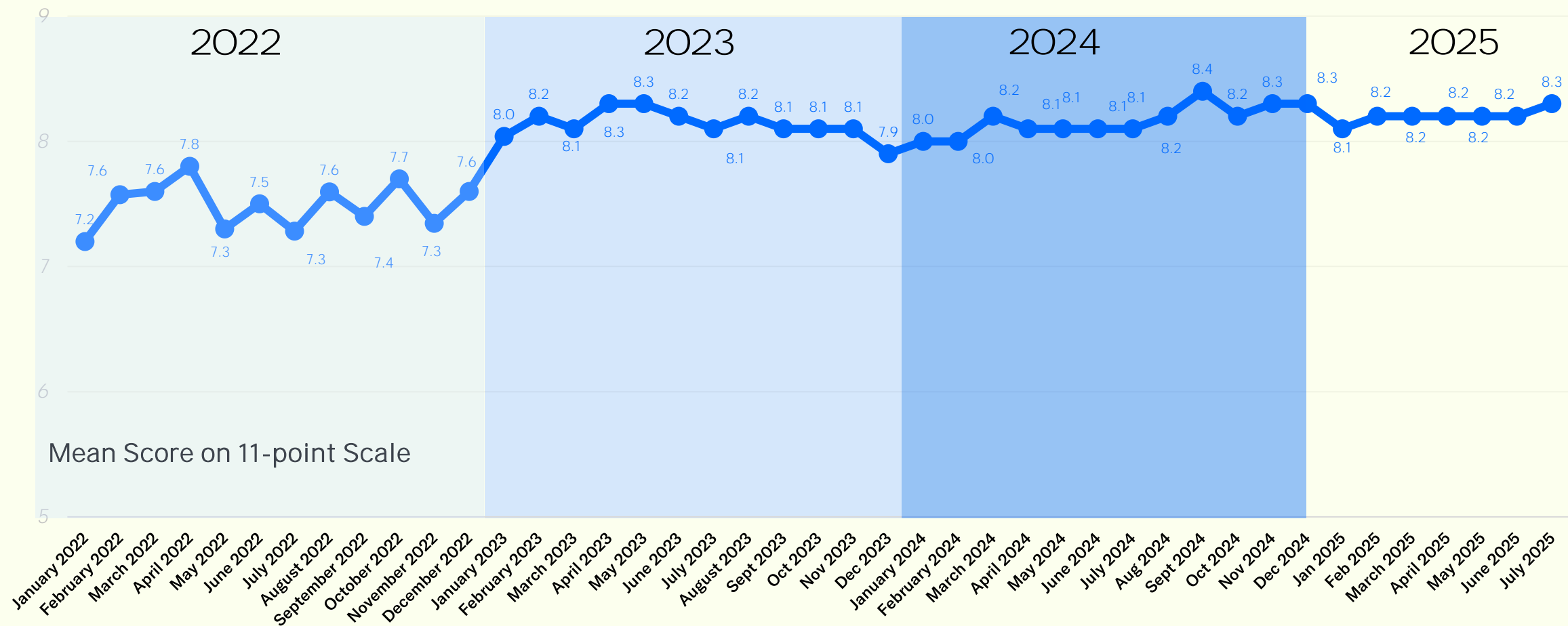
Nearly 9-in-10 American travelers have strong excitement to travel

Question:
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Excitement to travel sentiment remains elevated

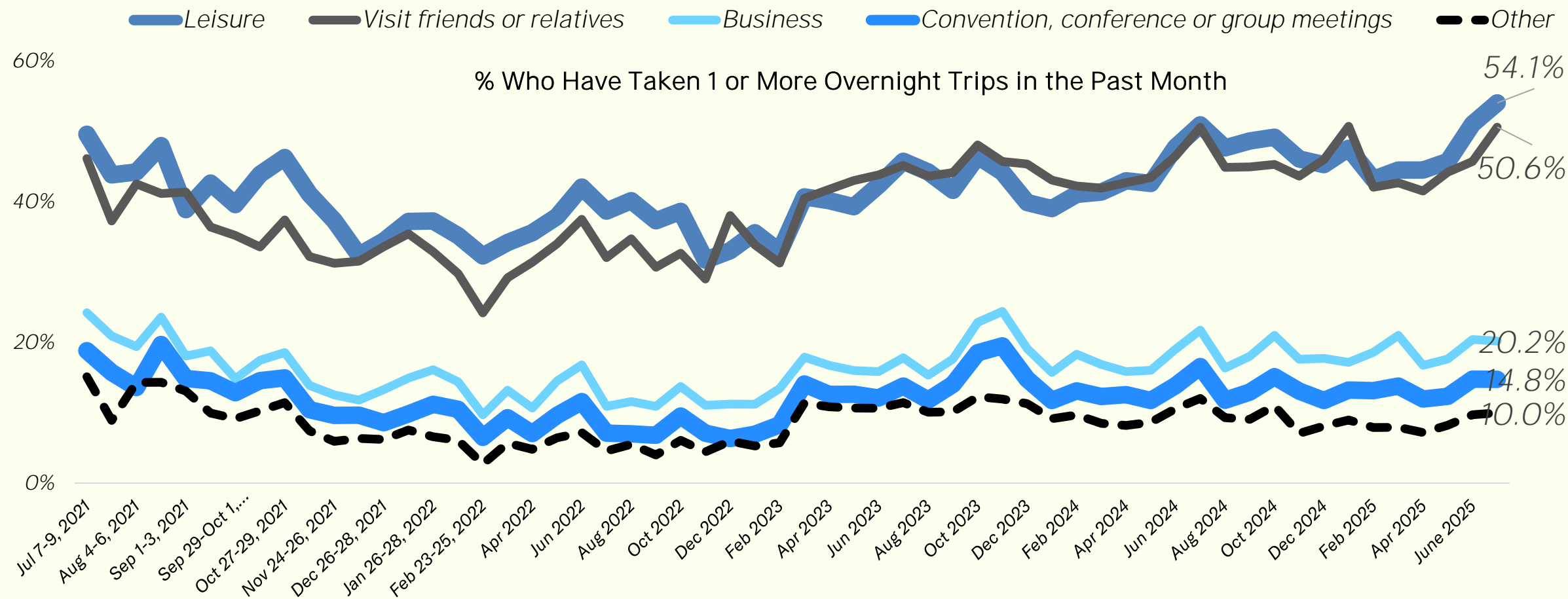
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Leisure and Visiting Friends/Relatives Trips Lead a Post-Pandemic Travel Rate High

Question:

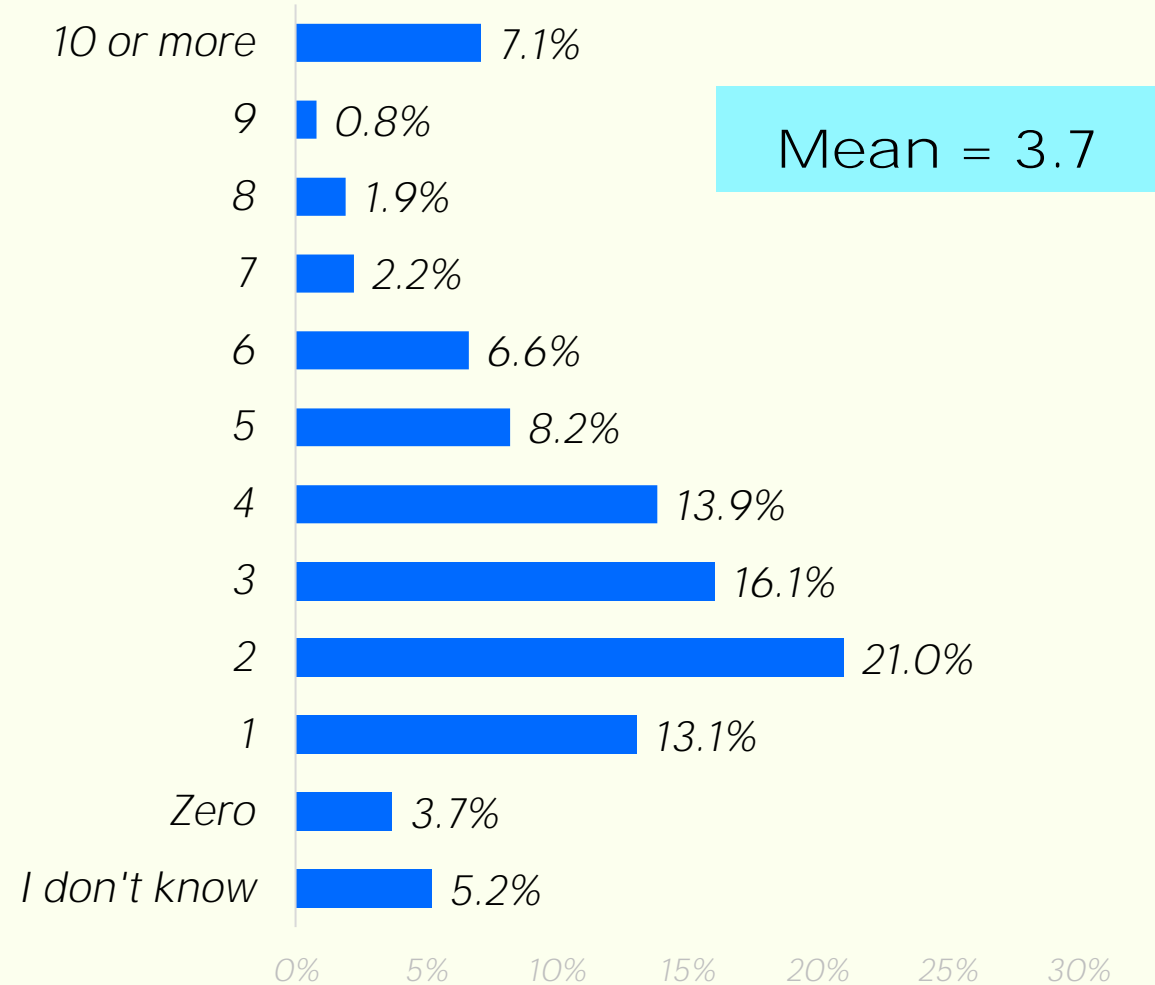
How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)



The average American traveler expects to take 3.7 leisure trips in the next year

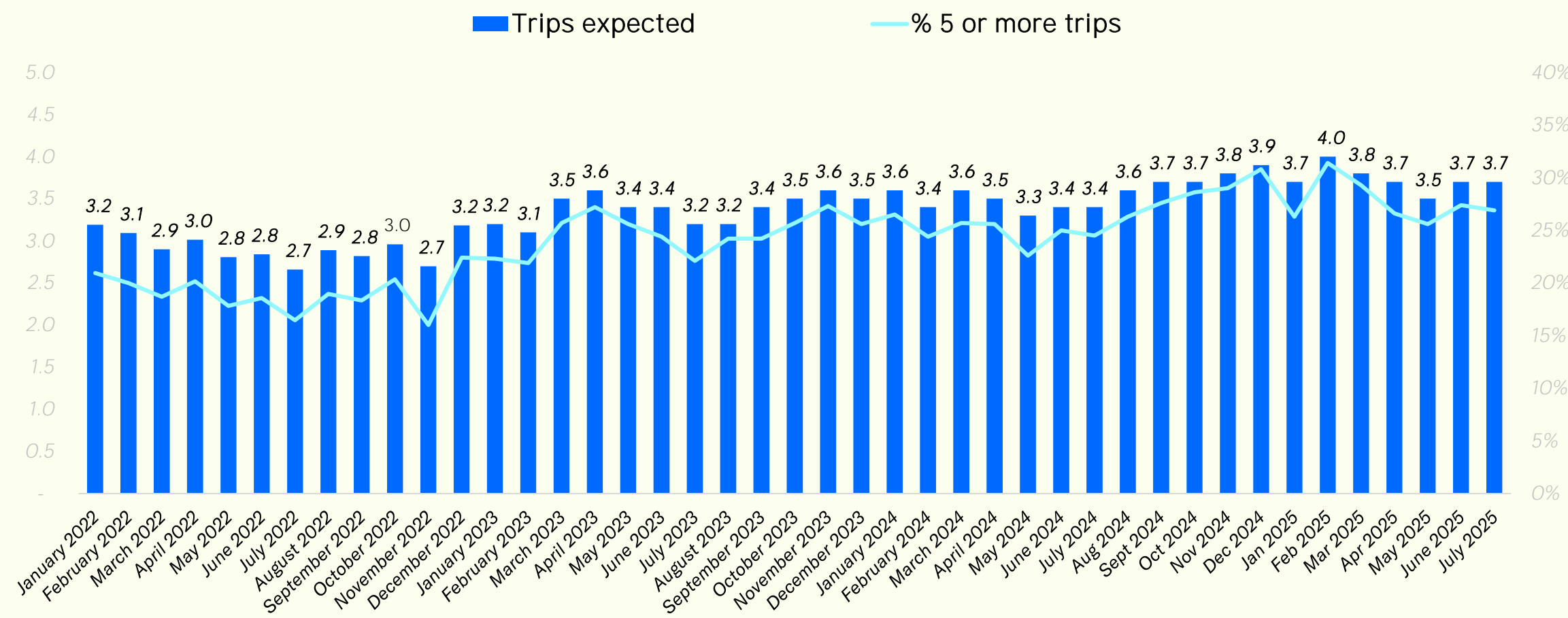
Question:

IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



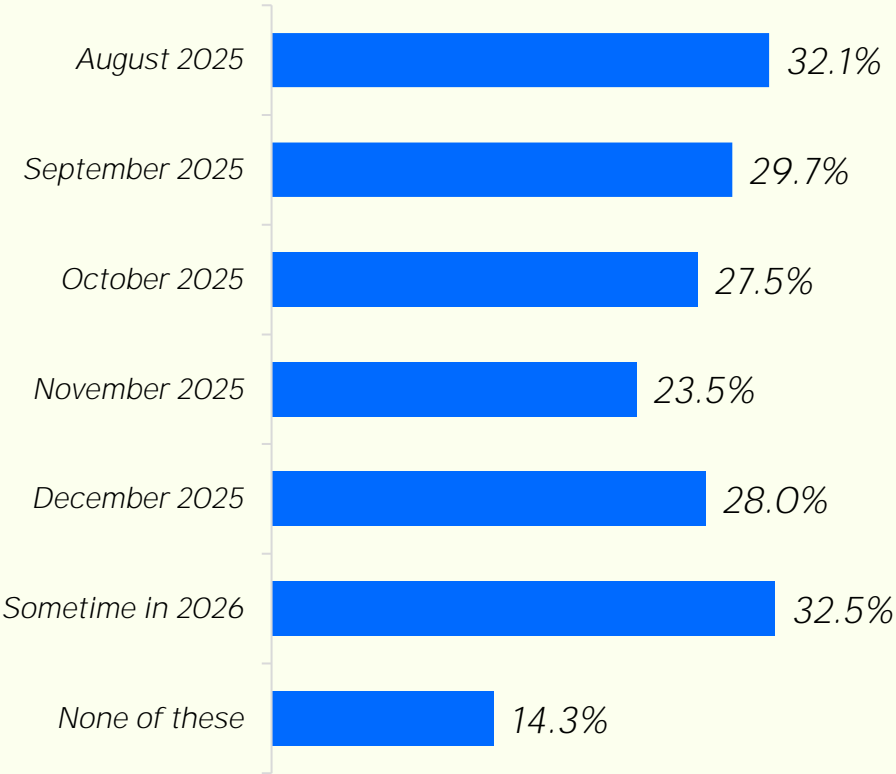
Expected trip volume held constant this month

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?*



Nearly 86 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)?*



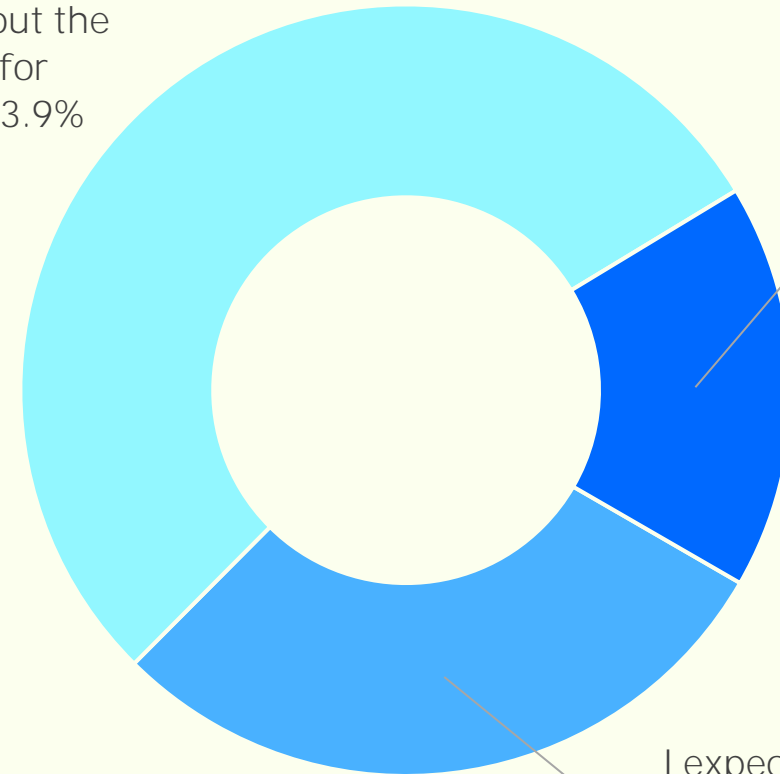
85.7%
have at least one trip
currently planned

Nearly 3-in-10 American travelers plan **to “travel more” in the next year**

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)*

I expect to travel about the same for leisure, 53.9%

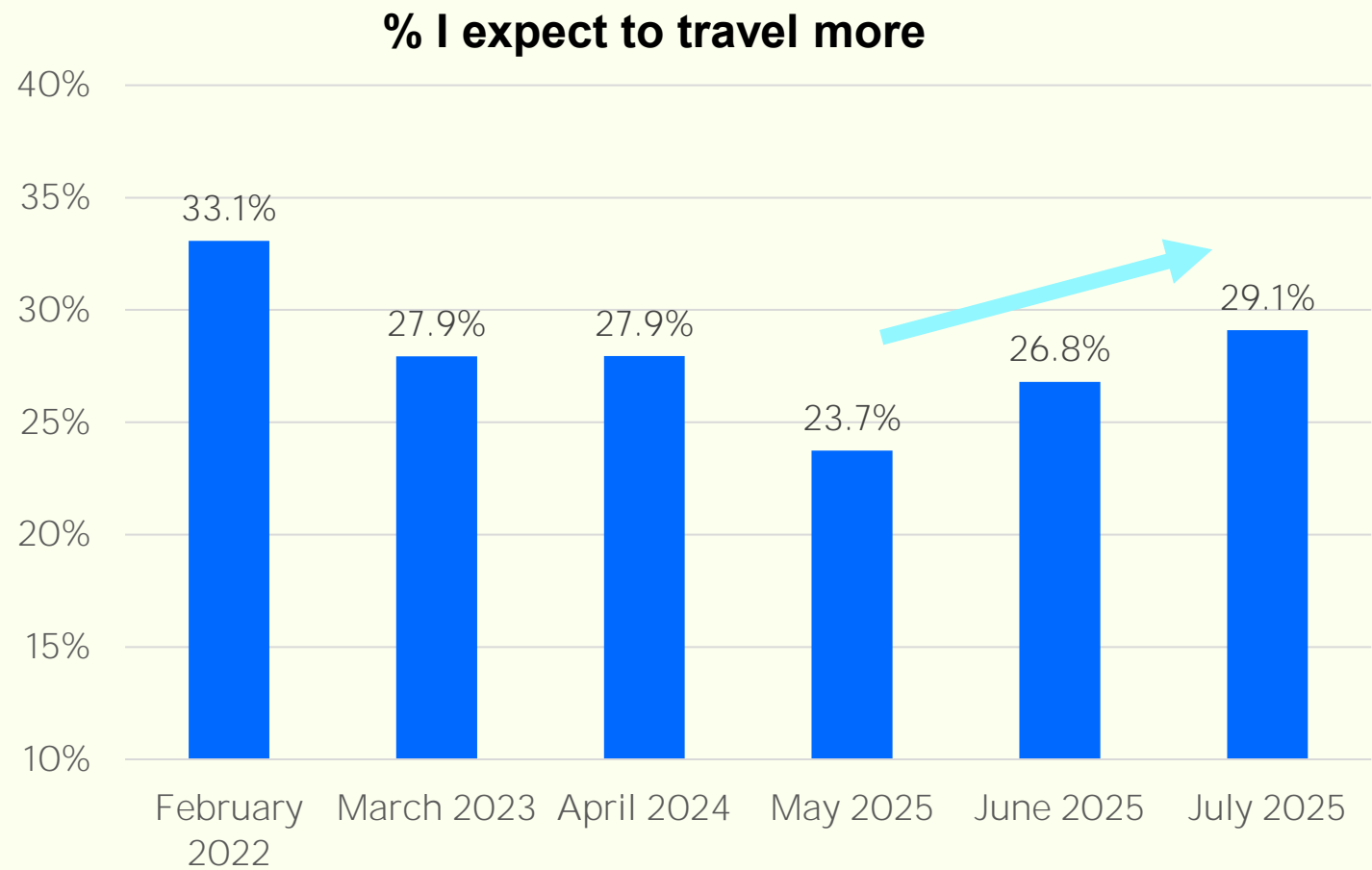


I expect to travel less for leisure, 17.0%

I expect to travel more for leisure, 29.1%

Plans to “travel more” in the next year improved

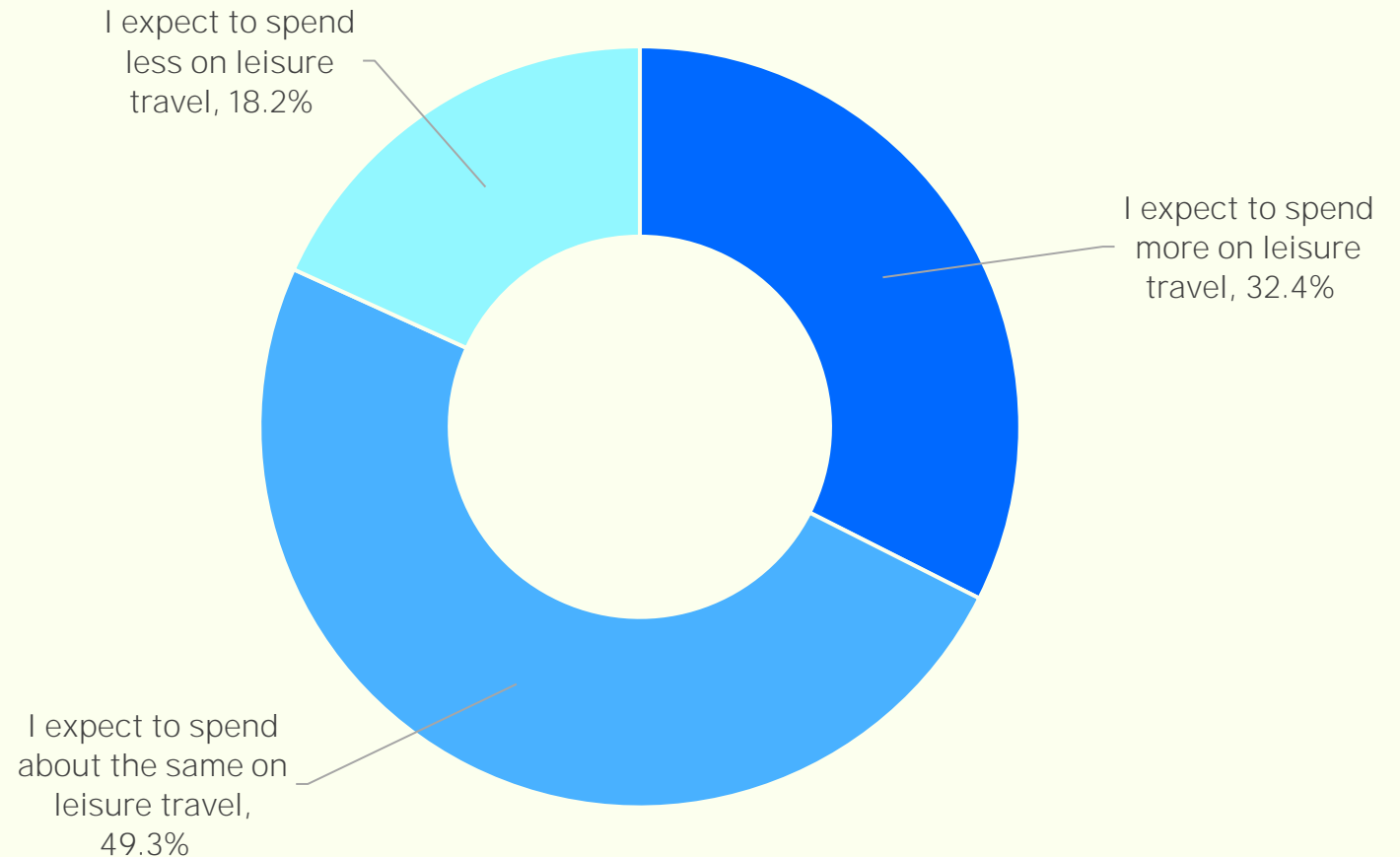
Question:
In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period?
(Select one)



Nearly one-third of American travelers plan to spend more on travel in the next year

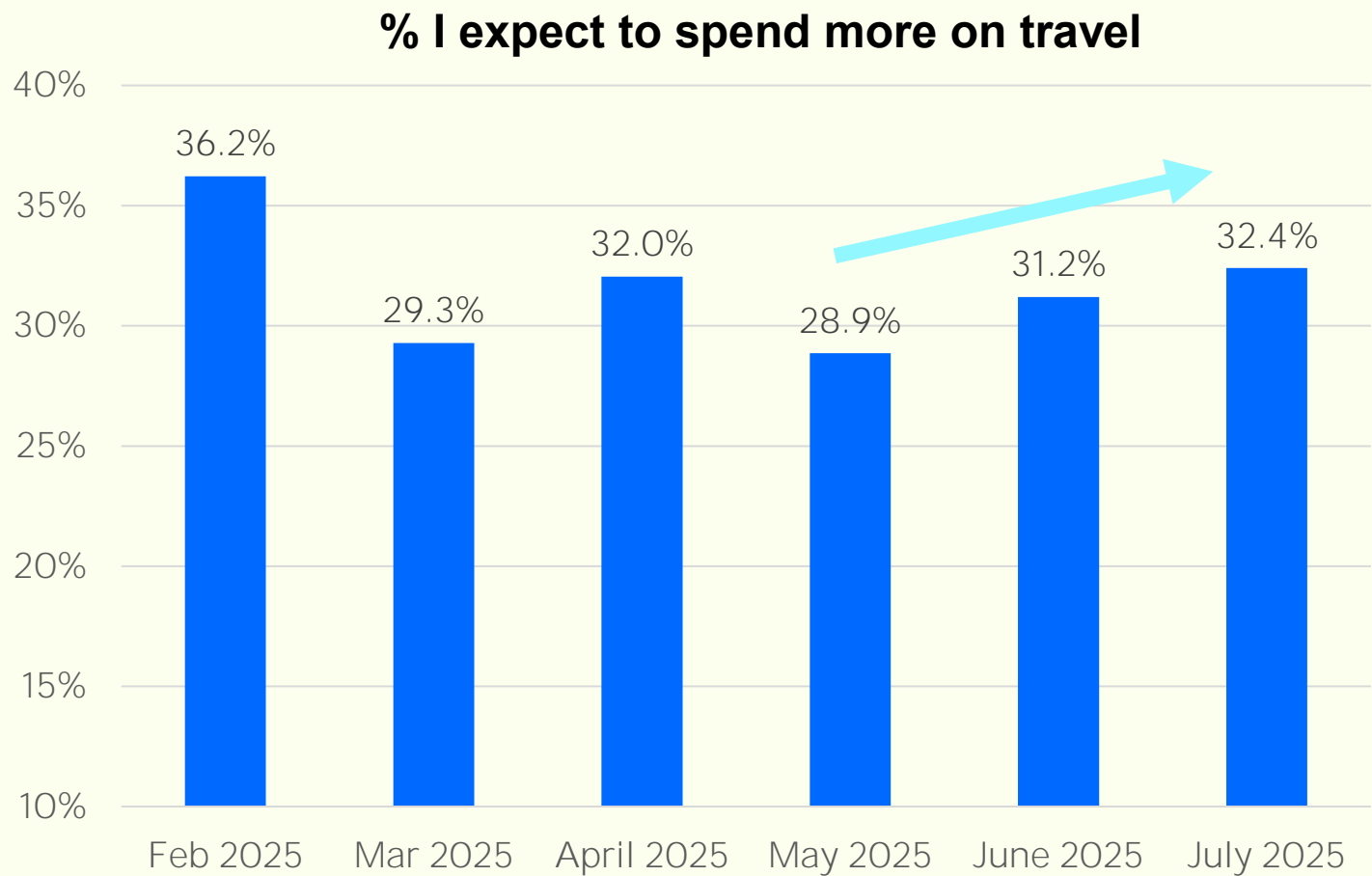
Question:

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? (Select one)



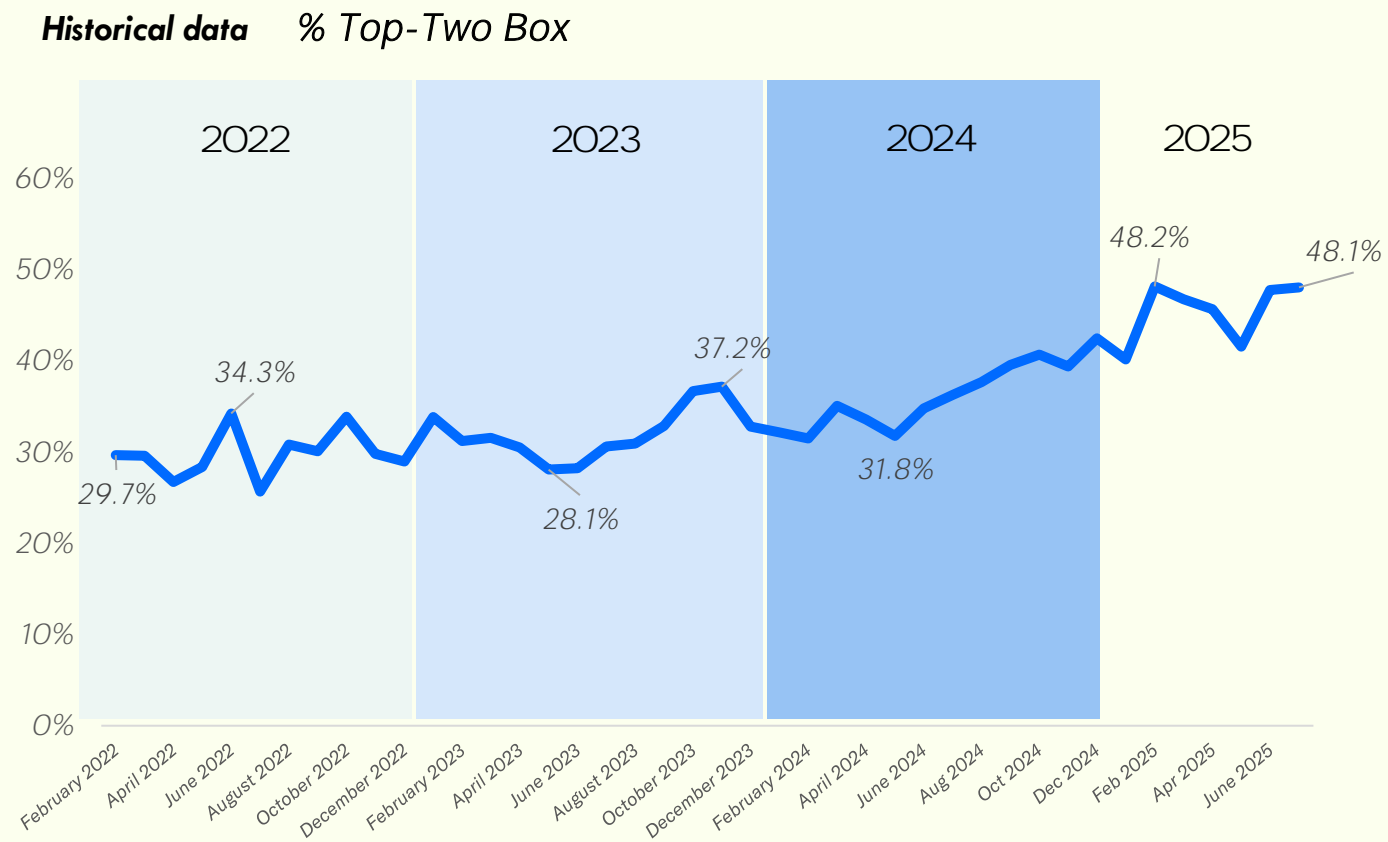
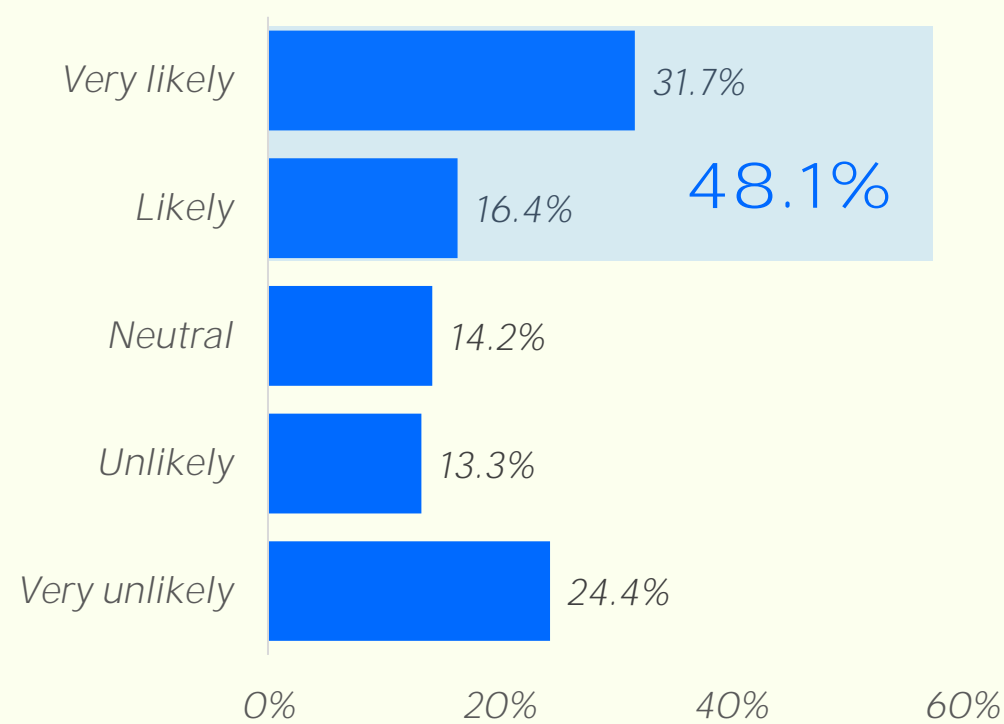
Travel spending expectations follows the same upward trajectory as travel volume

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? (Select one)



International travel expectations jumped up this month and are at a record high for the second time this year

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

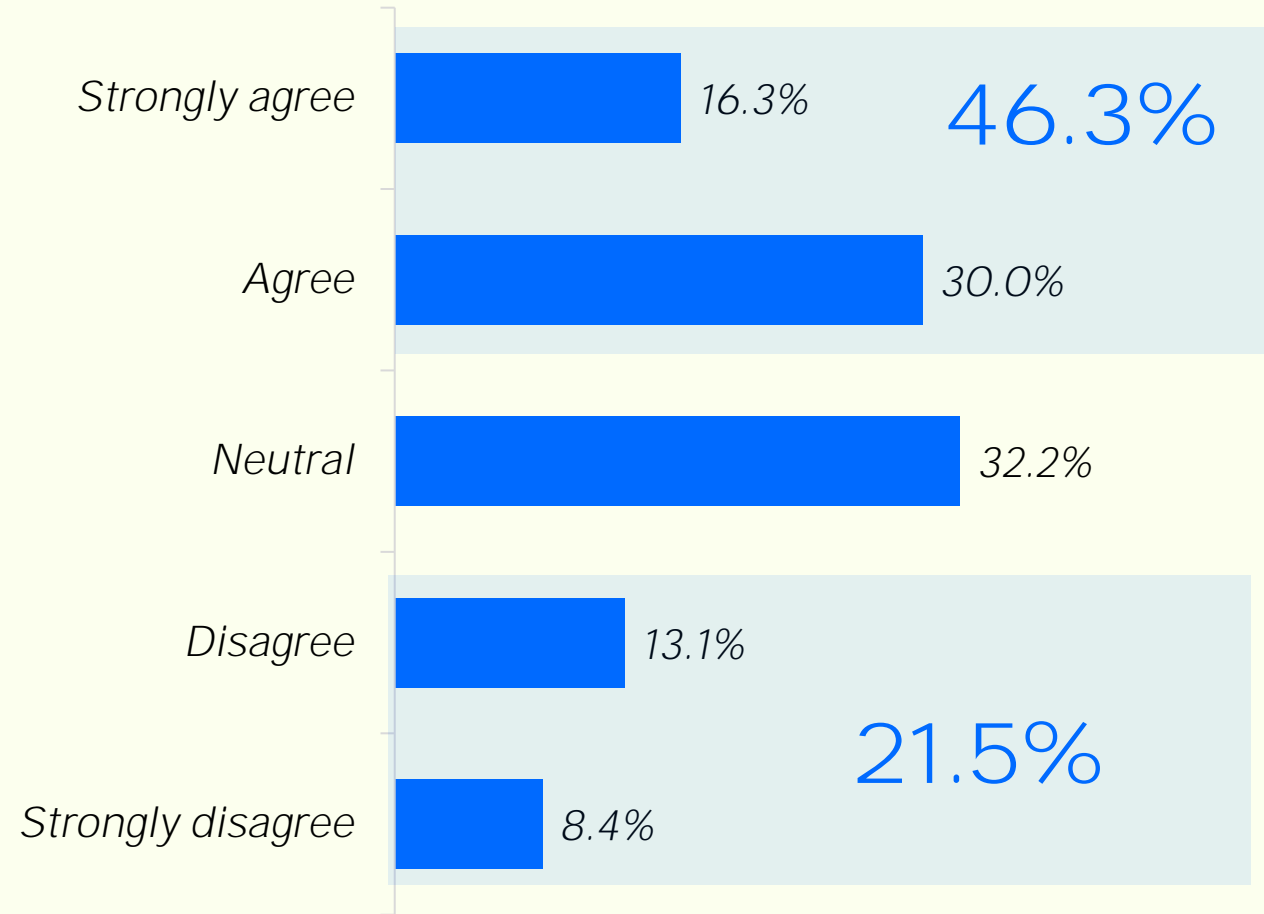


How are Americans
adapting to the current
economic situation?

46.3% of American travelers expect the U.S. will enter a recession in the next six months

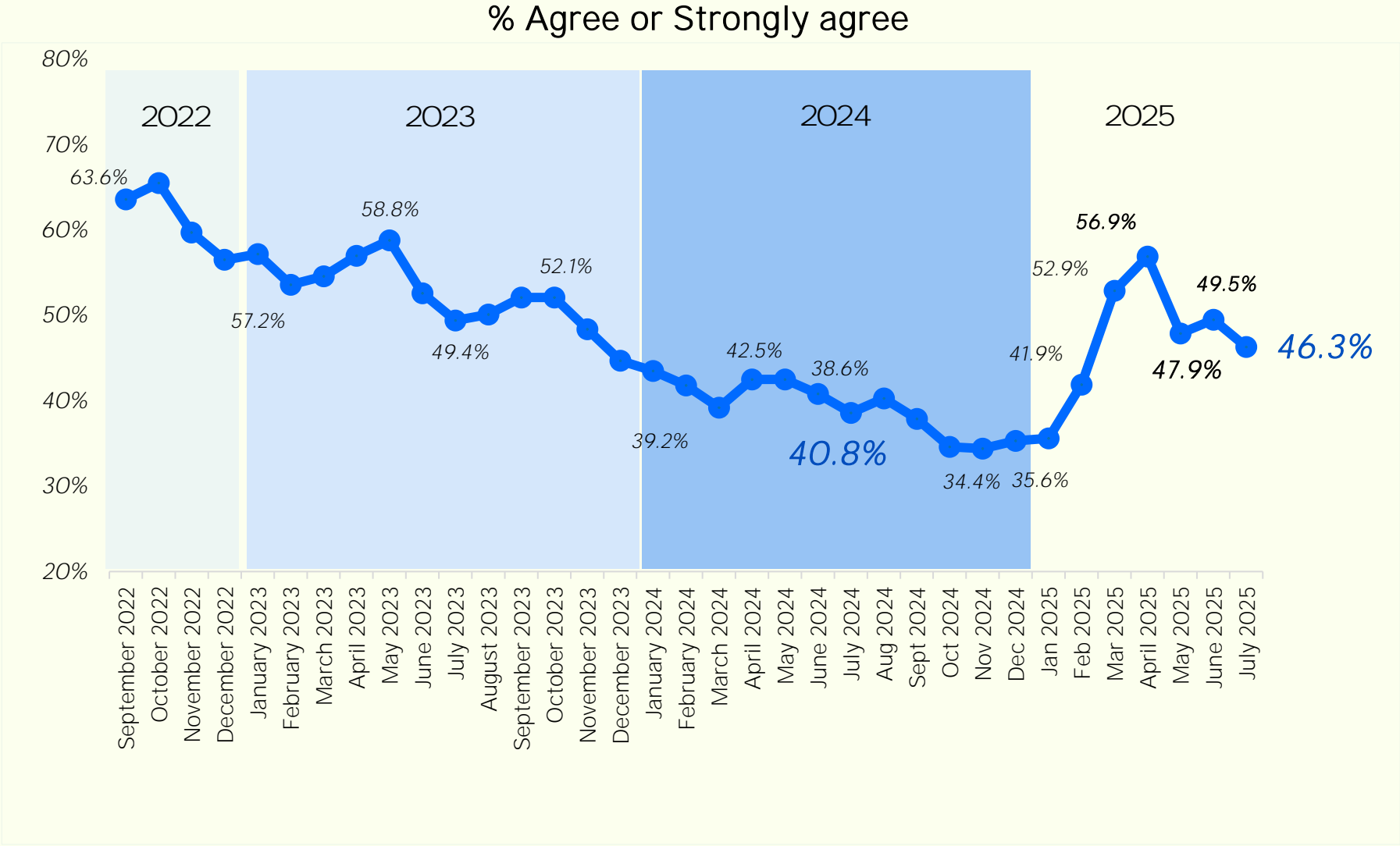
Question:

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



Recessionary concerns decreased slightly this month.

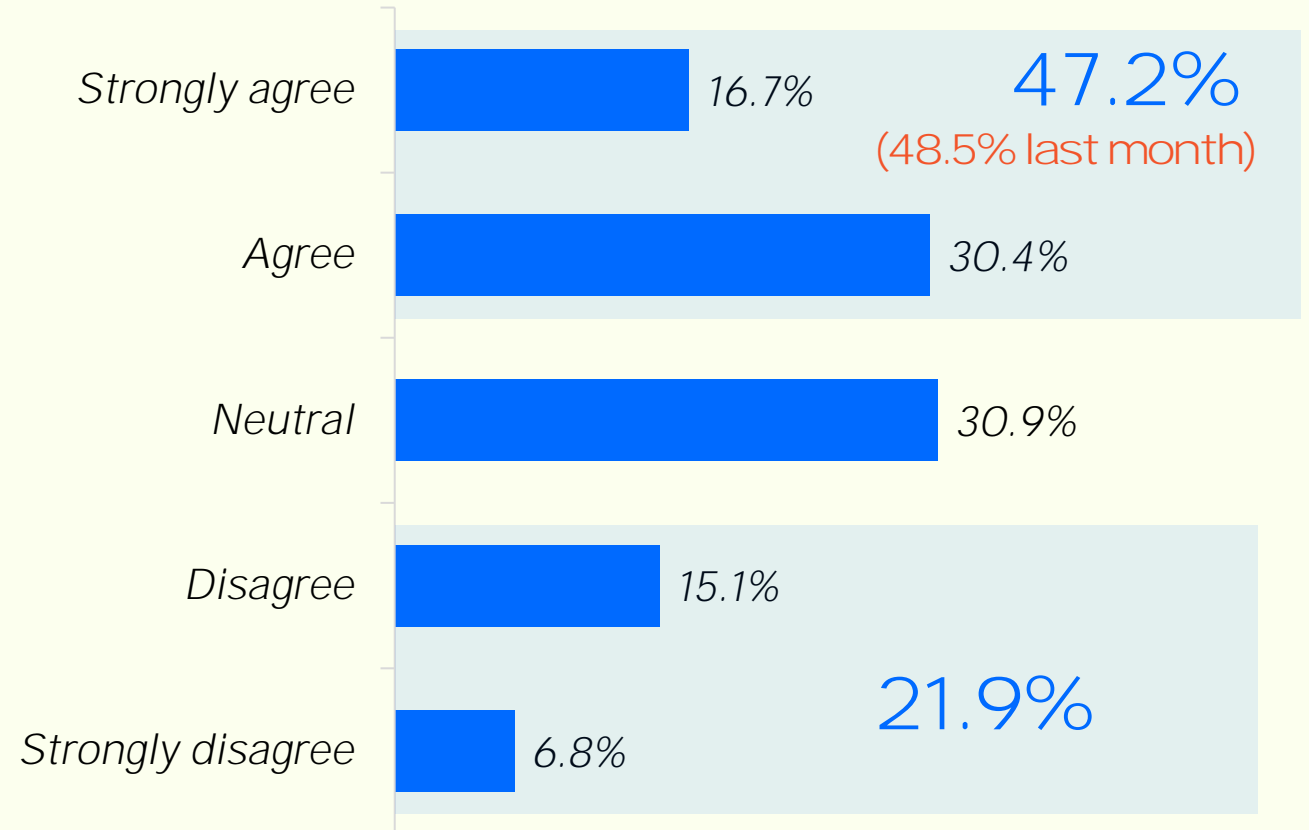
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Over 47% of American travelers report 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.

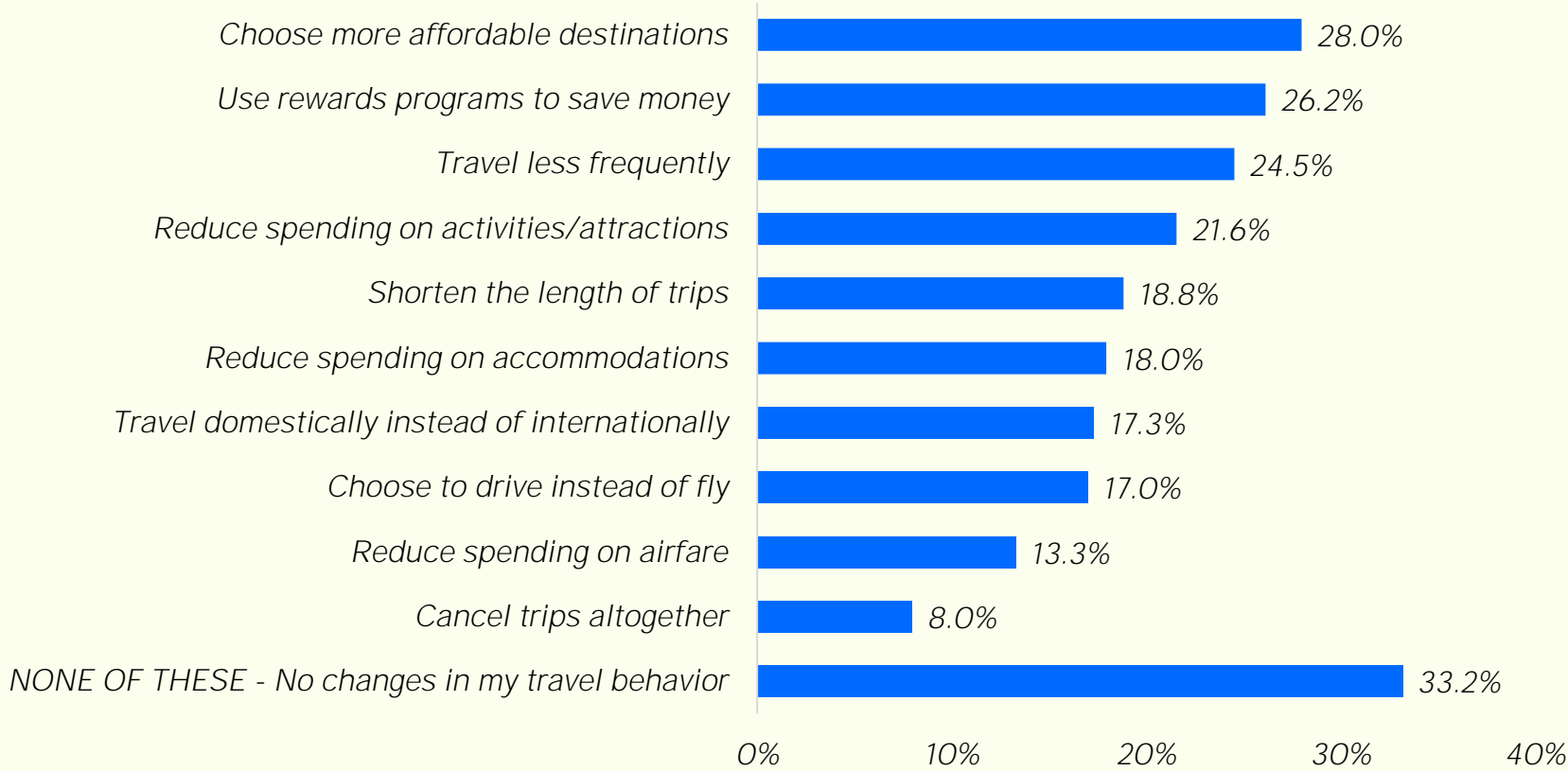


2-in-3 American travelers
expect to change their
behaviors due to economic
conditions.

More than two-thirds of travelers report adjusting their approach to travel to contend with economic concerns

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.

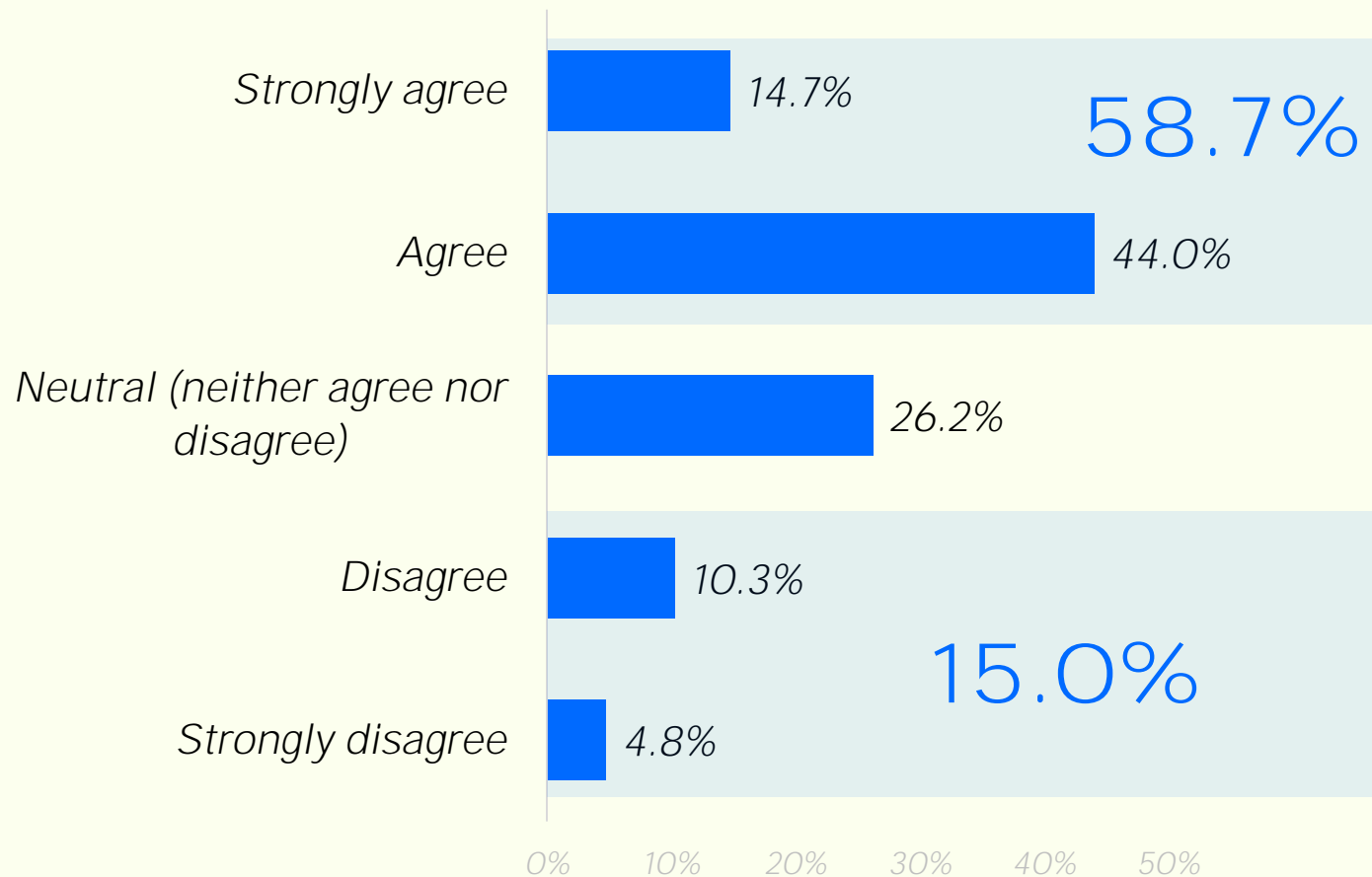
Due specifically to concerns about the economy, I expect to



Nearly 60% 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.



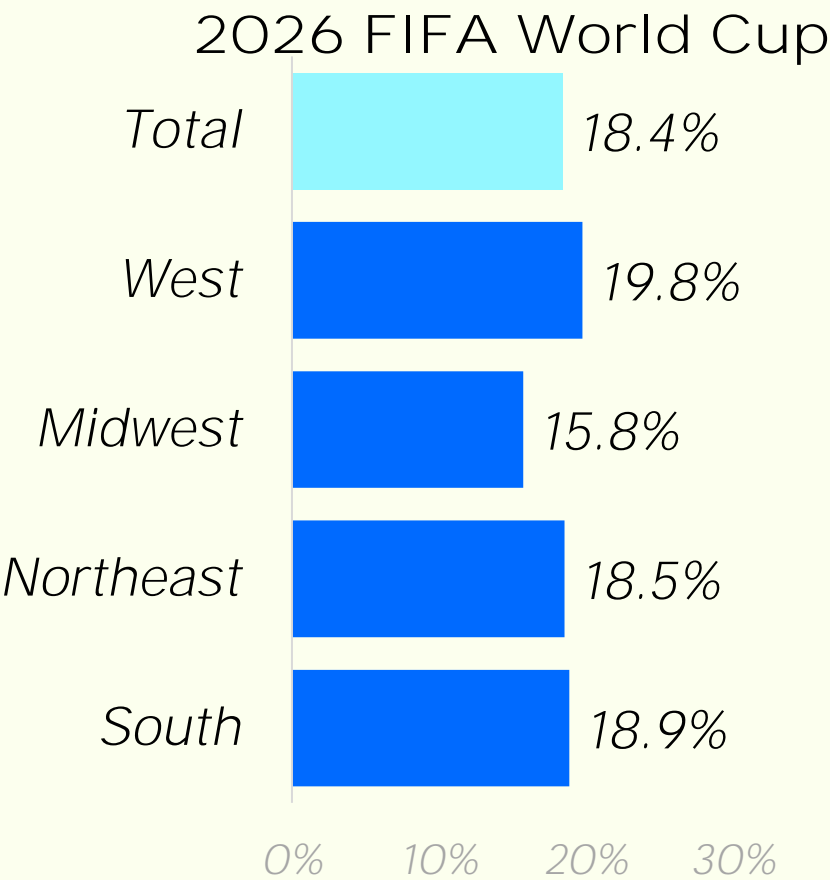
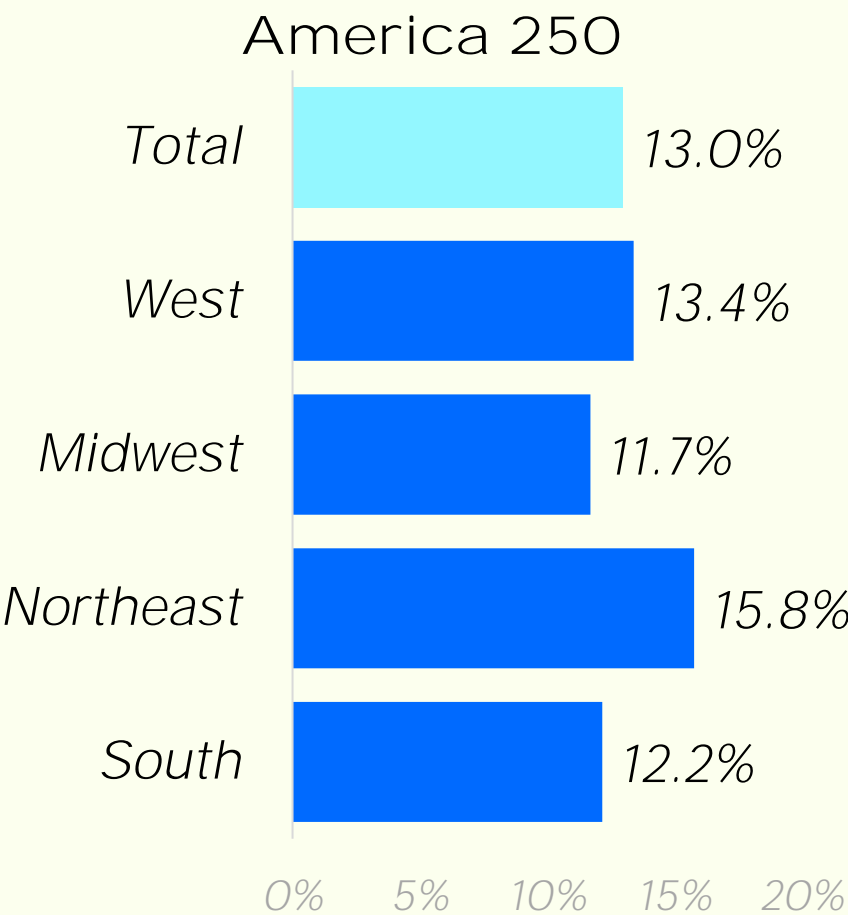
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Travel Interest for Upcoming Mega-Events

American Travelers Show Interest in Travel for Major Upcoming Events

Question: Which of the following upcoming events are you interested in traveling to attend? (Select all that apply)



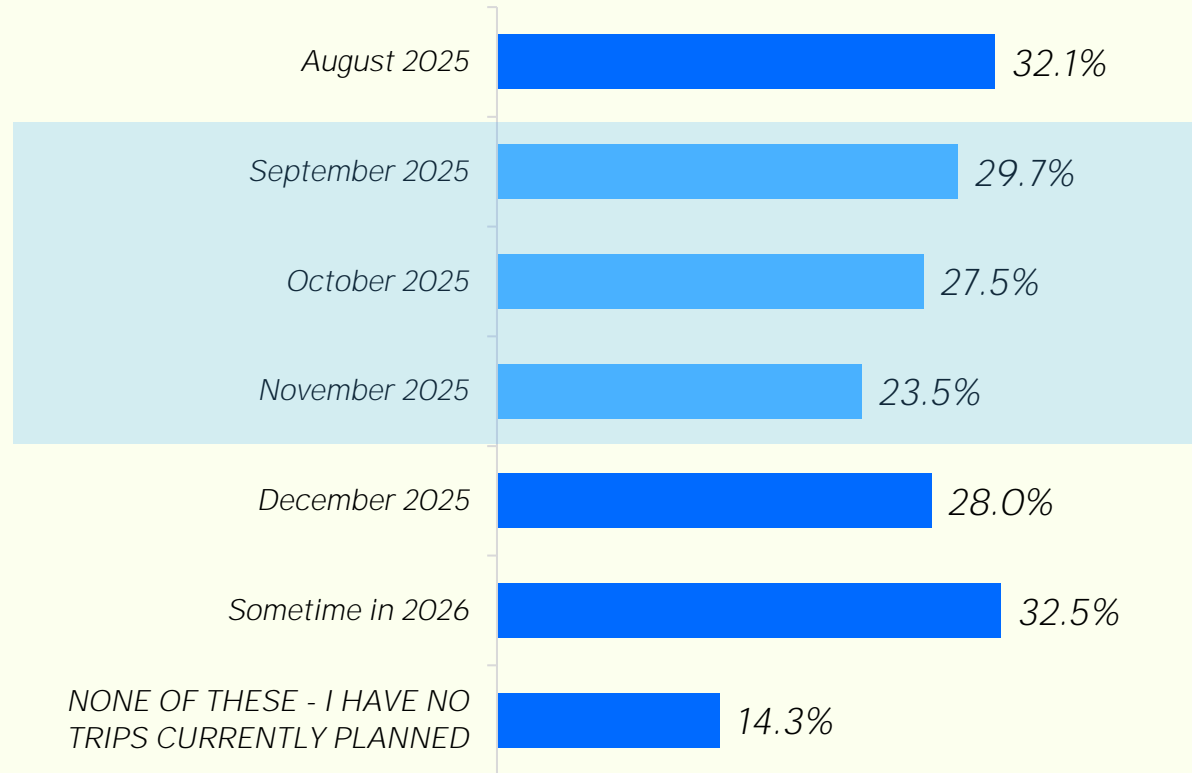
A romantic couple is seen from behind, sitting on a dark, mossy rock ledge. The woman, with long brown hair, wears a grey sweater and has her arm around the man. The man, with short dark hair, wears a white t-shirt and an orange shawl draped over his shoulders. They are looking down a rocky riverbed where water flows over stones. The banks are lined with trees in vibrant autumn colors of yellow and orange. In the distance, a small town is visible on a hill under a cloudy sky.

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Fall Travel

A majority of American travelers expect to take a trip this Fall

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



57.7%

have at least one trip
currently planned

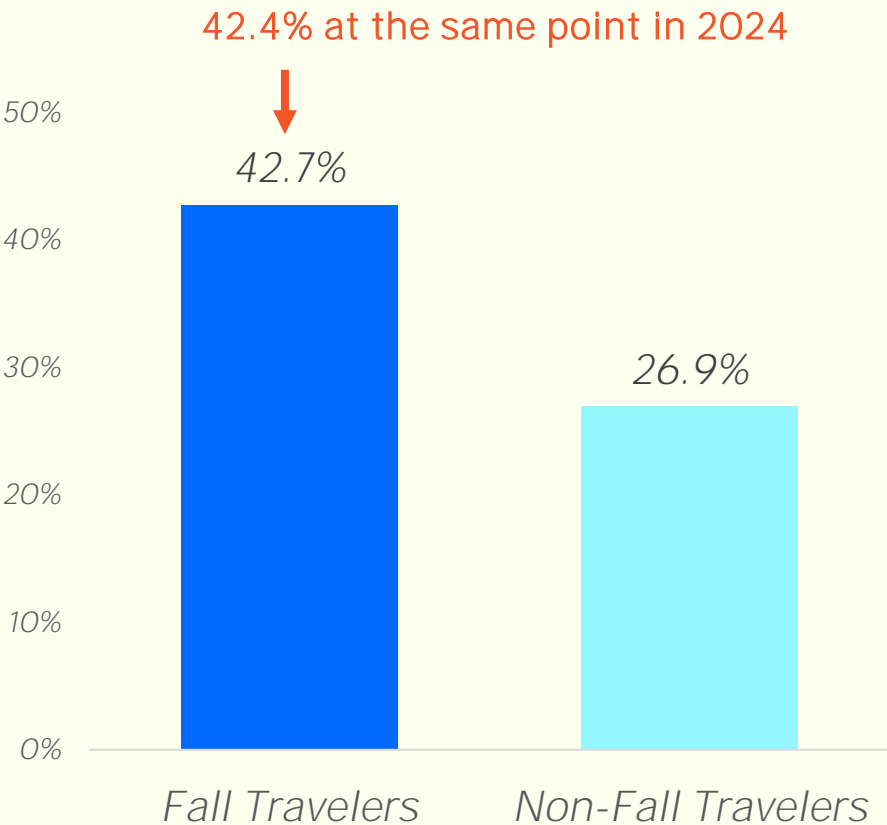
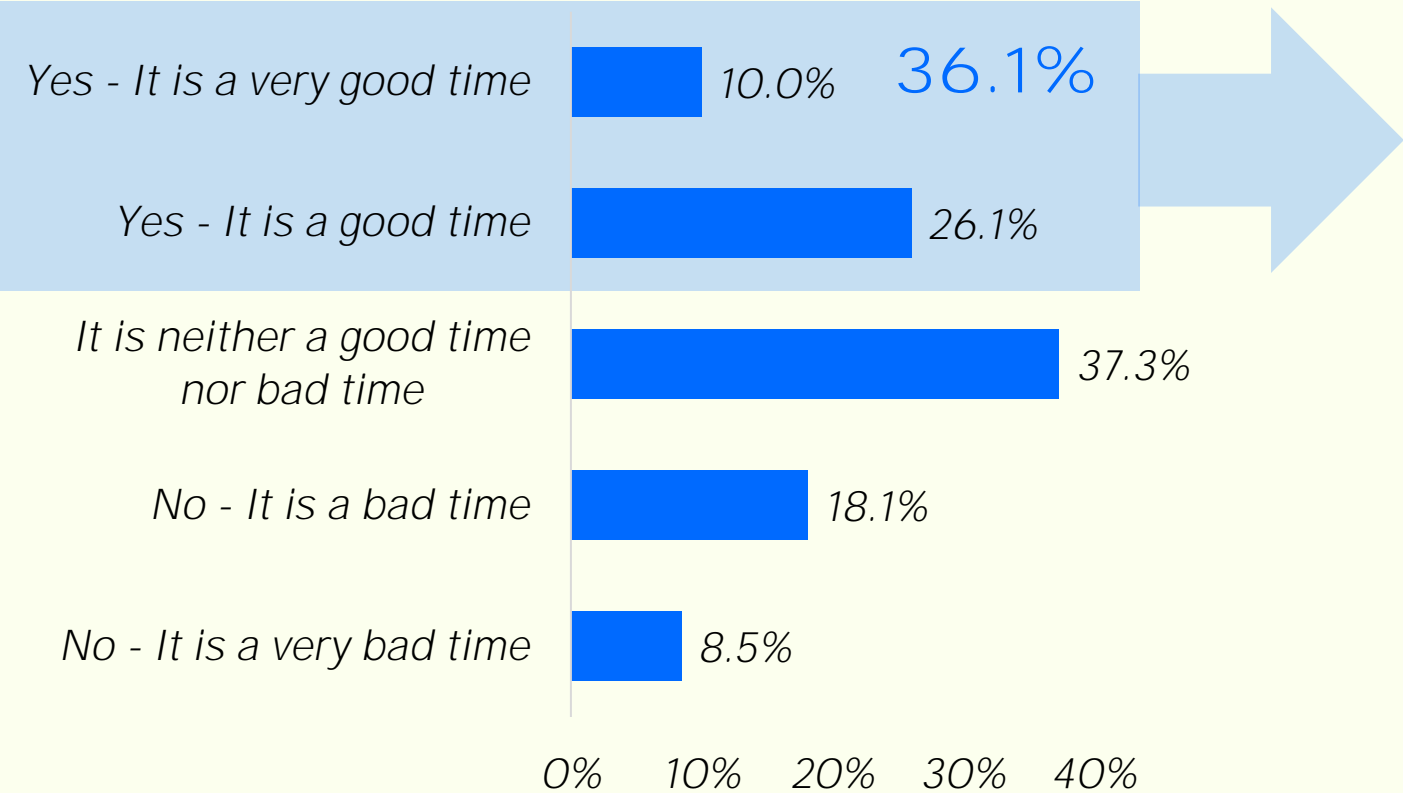


56.5%

At the same point in 2024

Fall travelers are feeling good about spending on travel right now

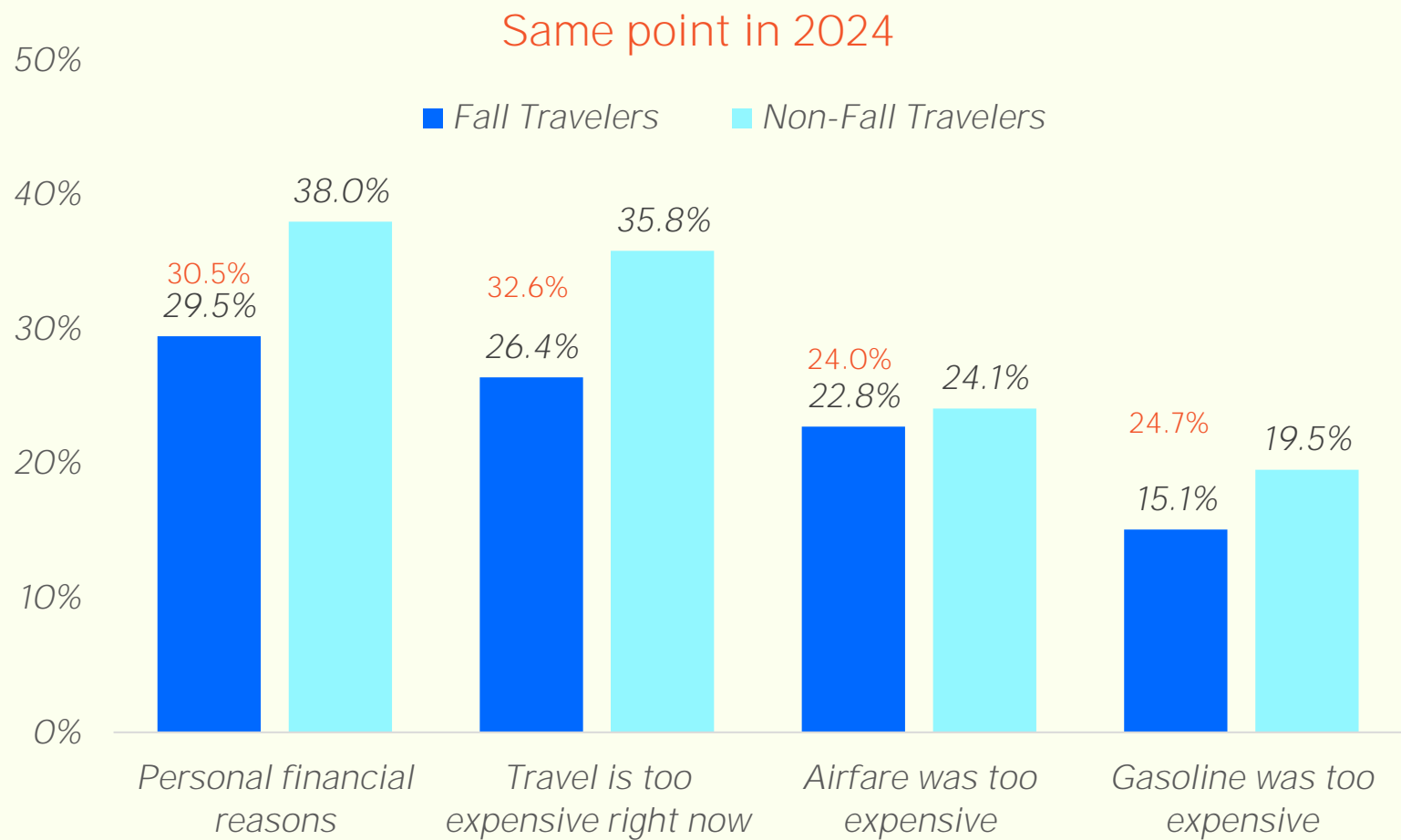
Question:
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



Fall travelers feel better about the financial aspects of travel right now

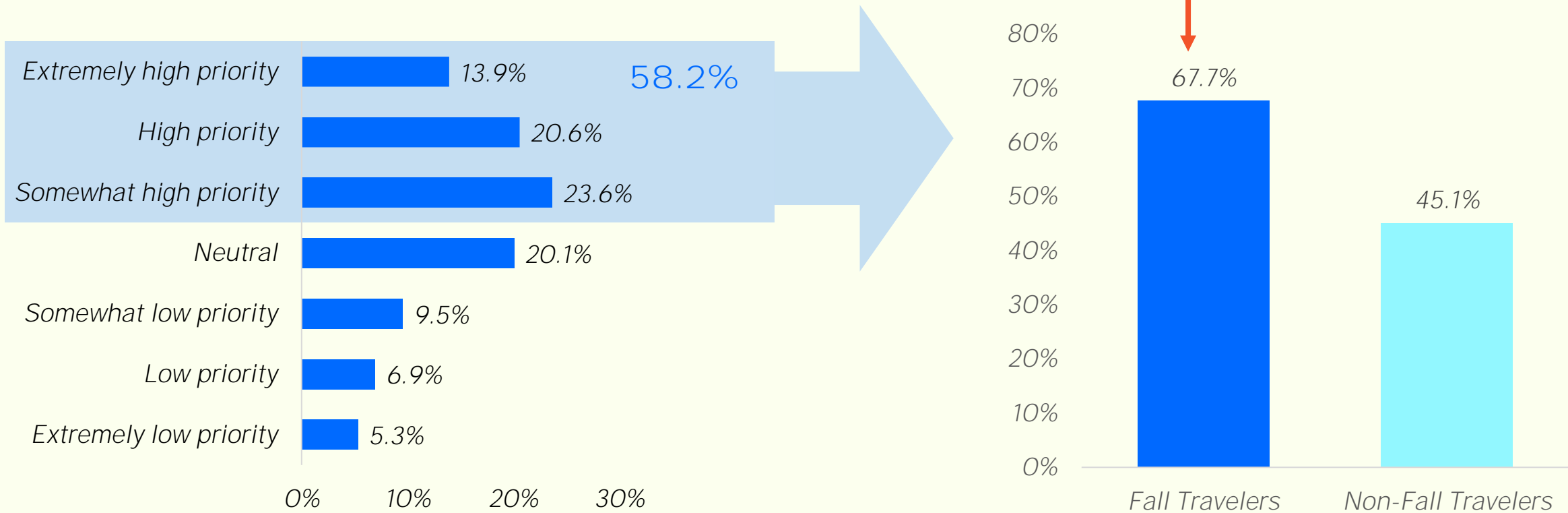
Question:

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?



Fall Travelers are prioritizing travel in their budgets

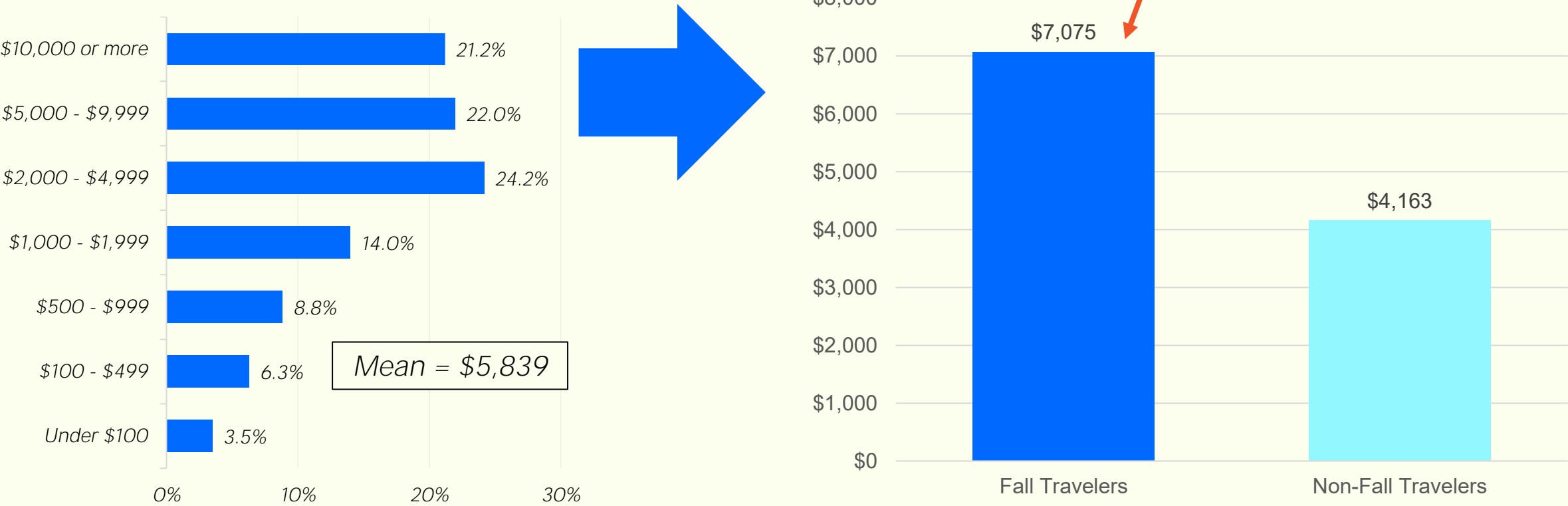
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



Fall travelers have bigger budgets

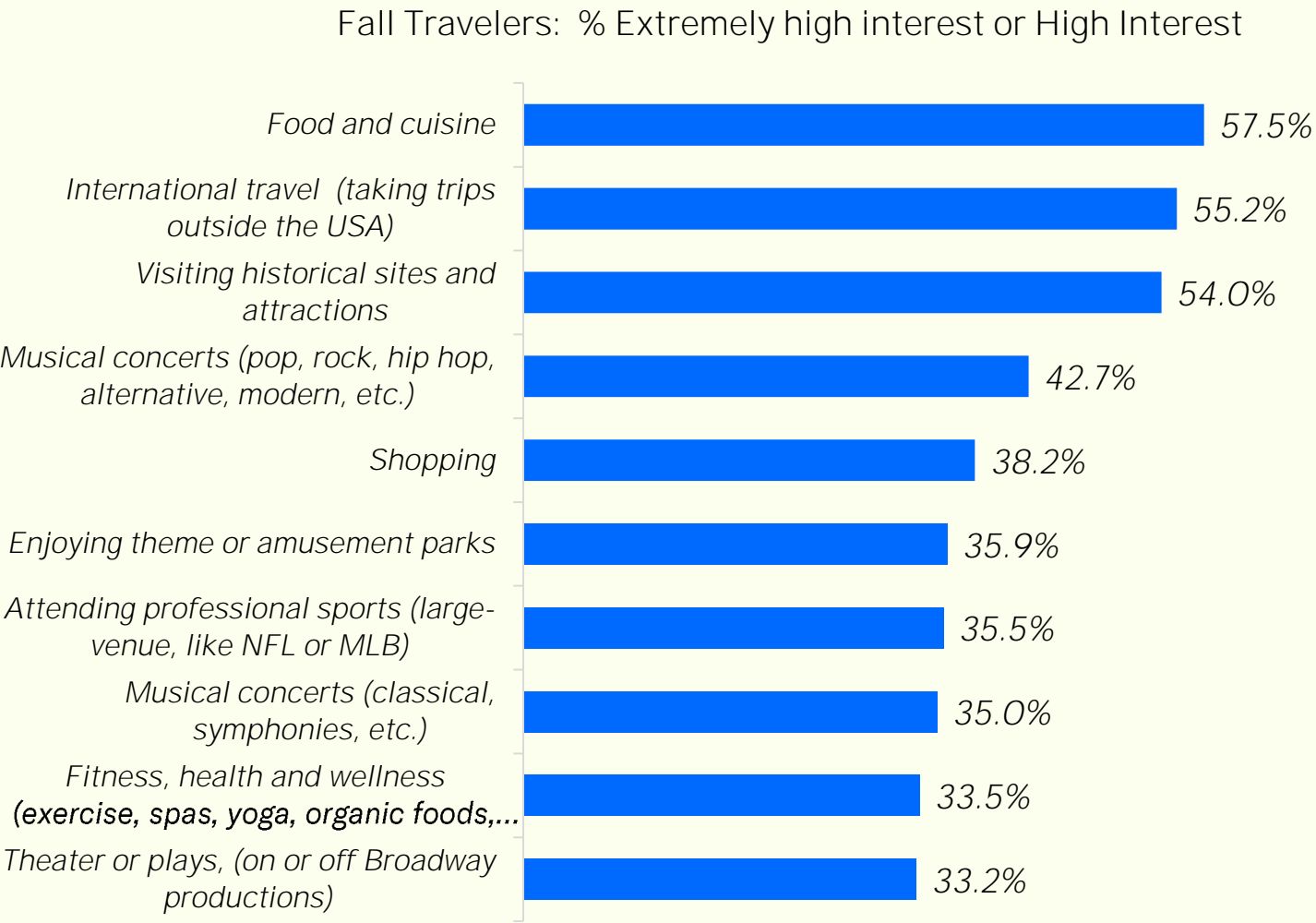
Question:

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?



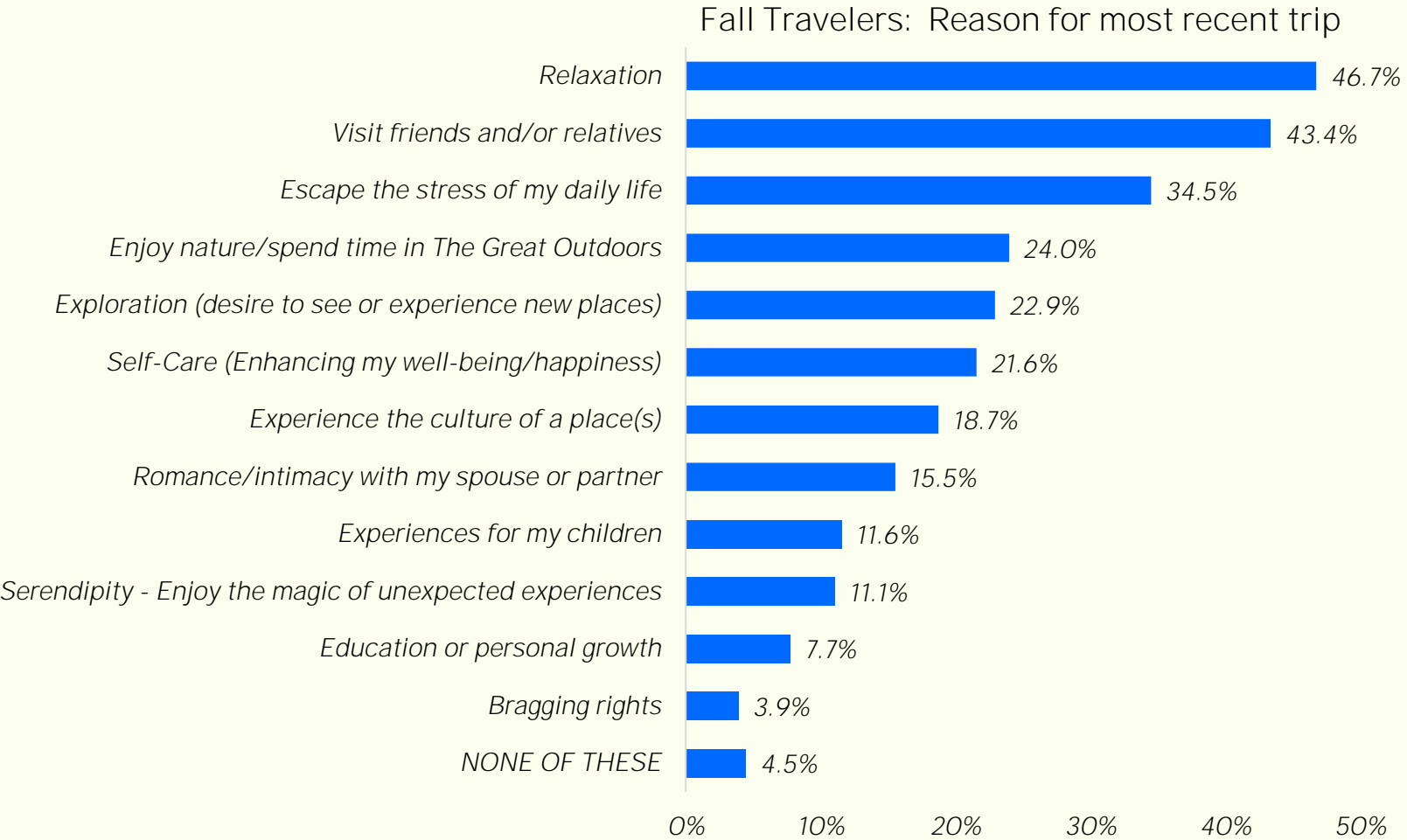
Fall travelers have diverse travel interests

Question:
Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.



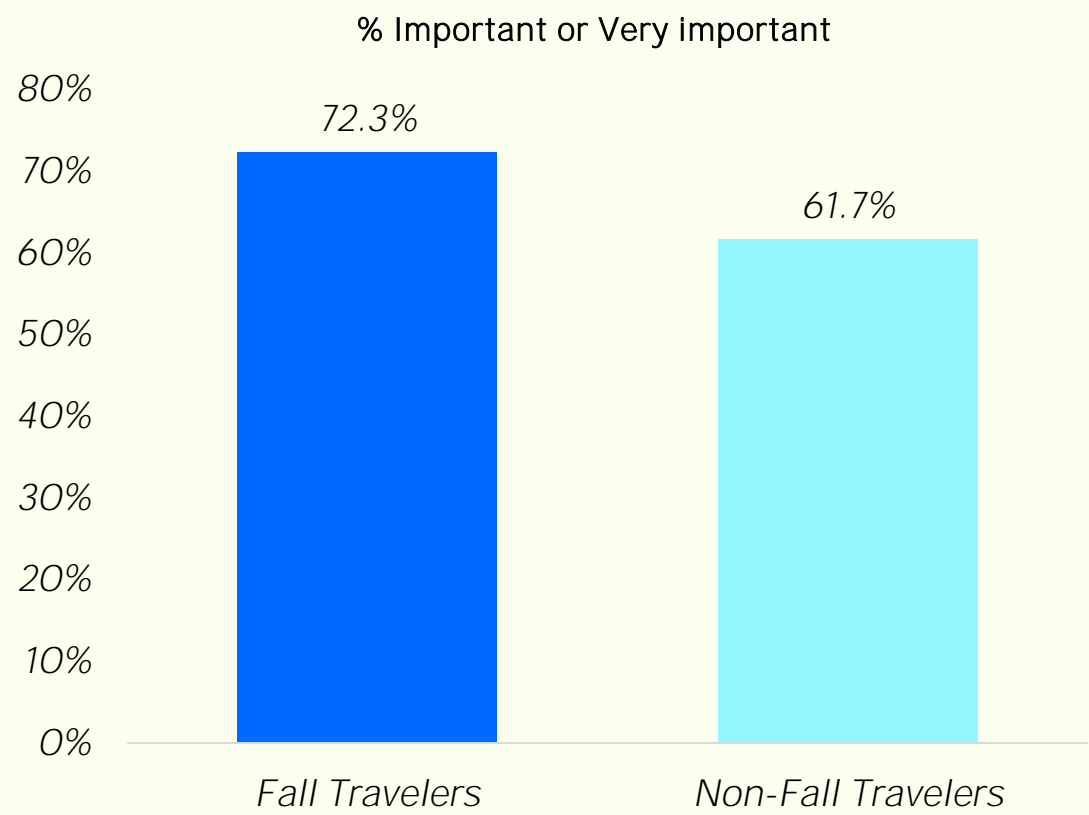
Relaxation, visiting friends and family and escaping stress are prime motivators right now.

Question:
Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

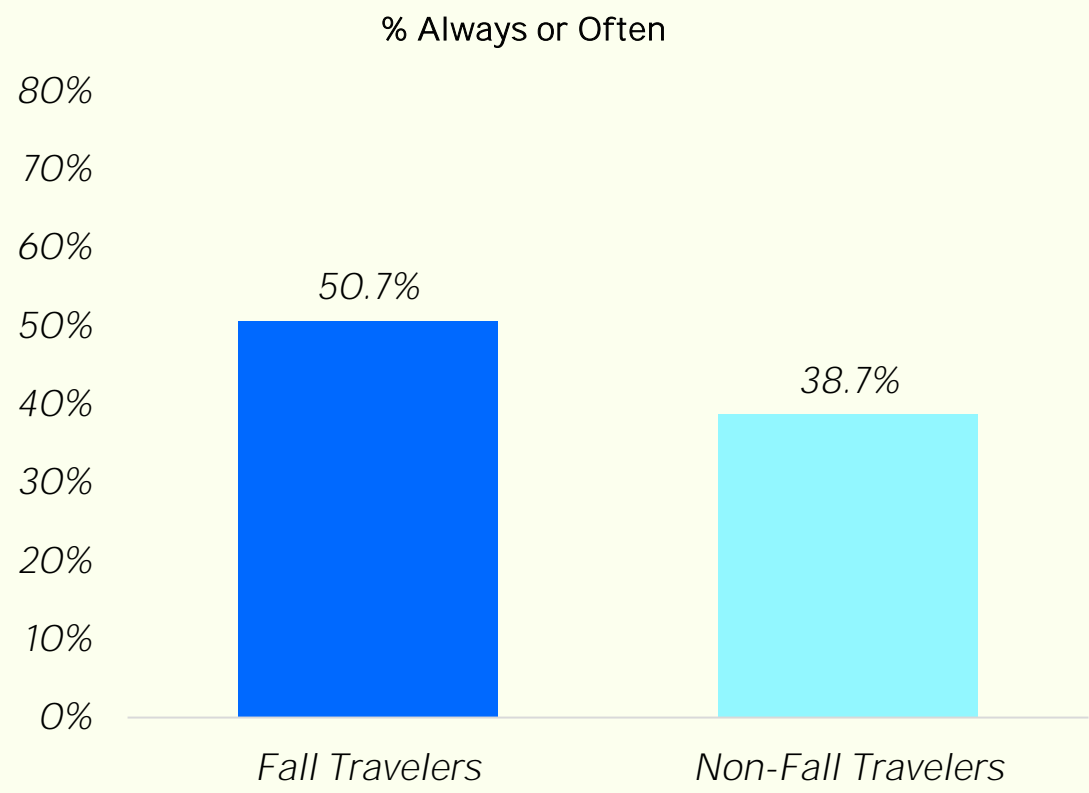


Wellness is popular with Fall travelers

Question: *Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being?*



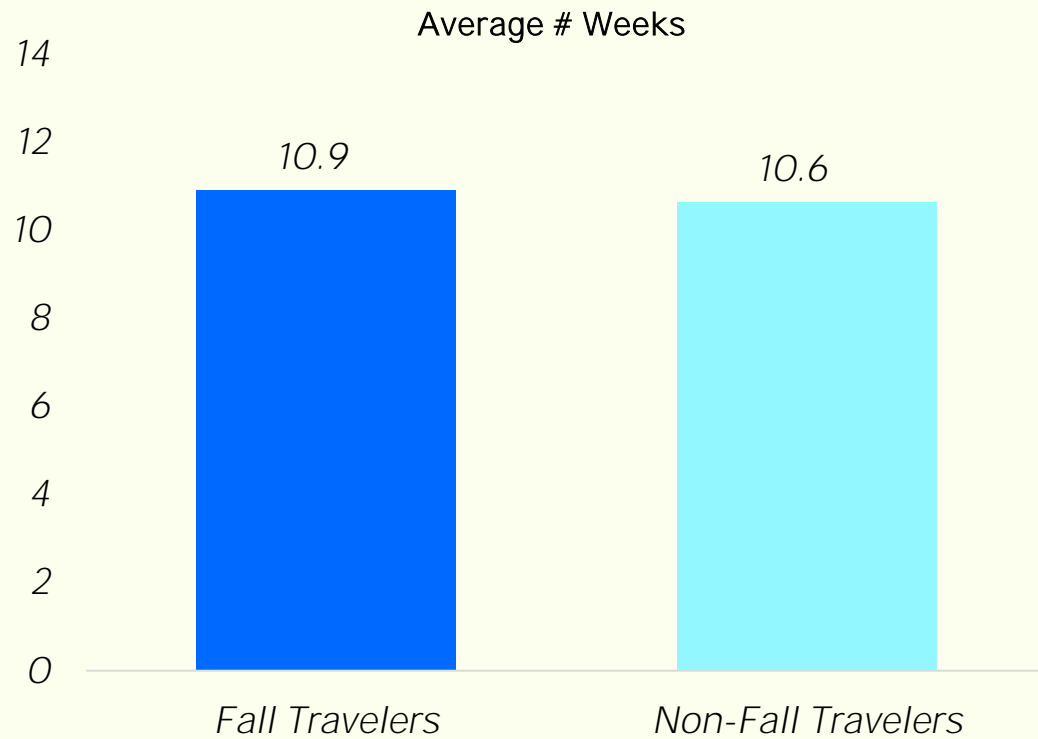
Question: *How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?*



Fall travelers are more spontaneous

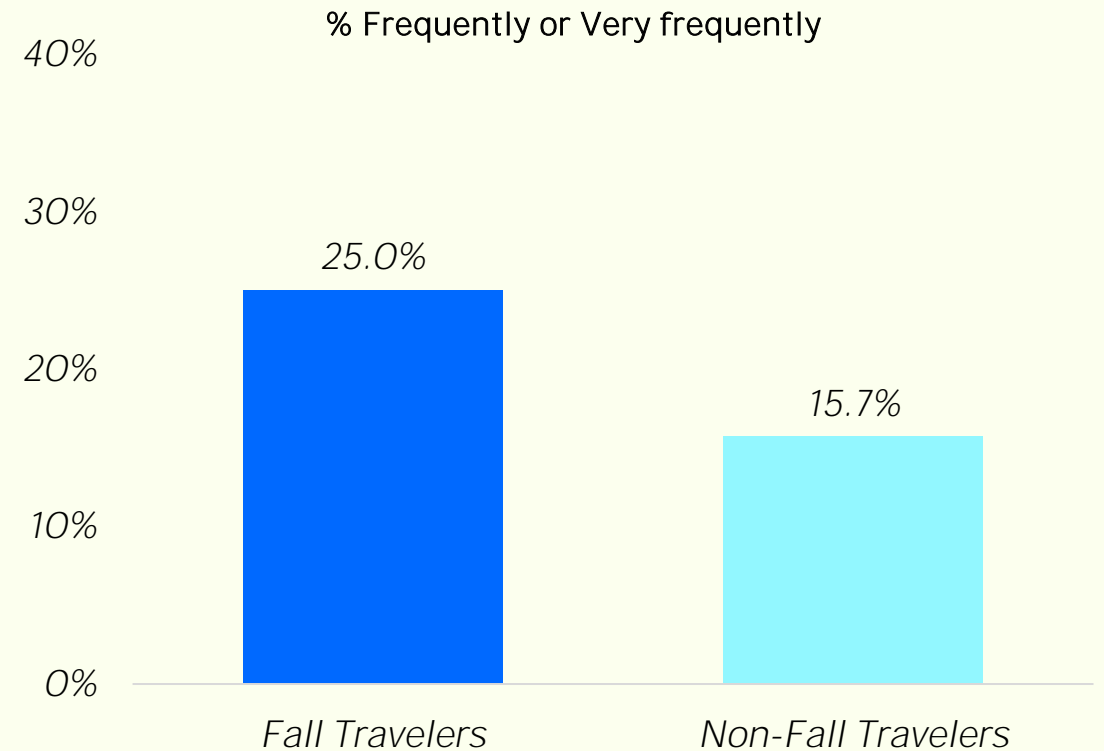
Average Travel Planning Thresholds

How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



Spontaneous Travel

How often do you take spontaneous leisure trips (i.e., trips sparked by impulse which begin soon after the idea arises)?

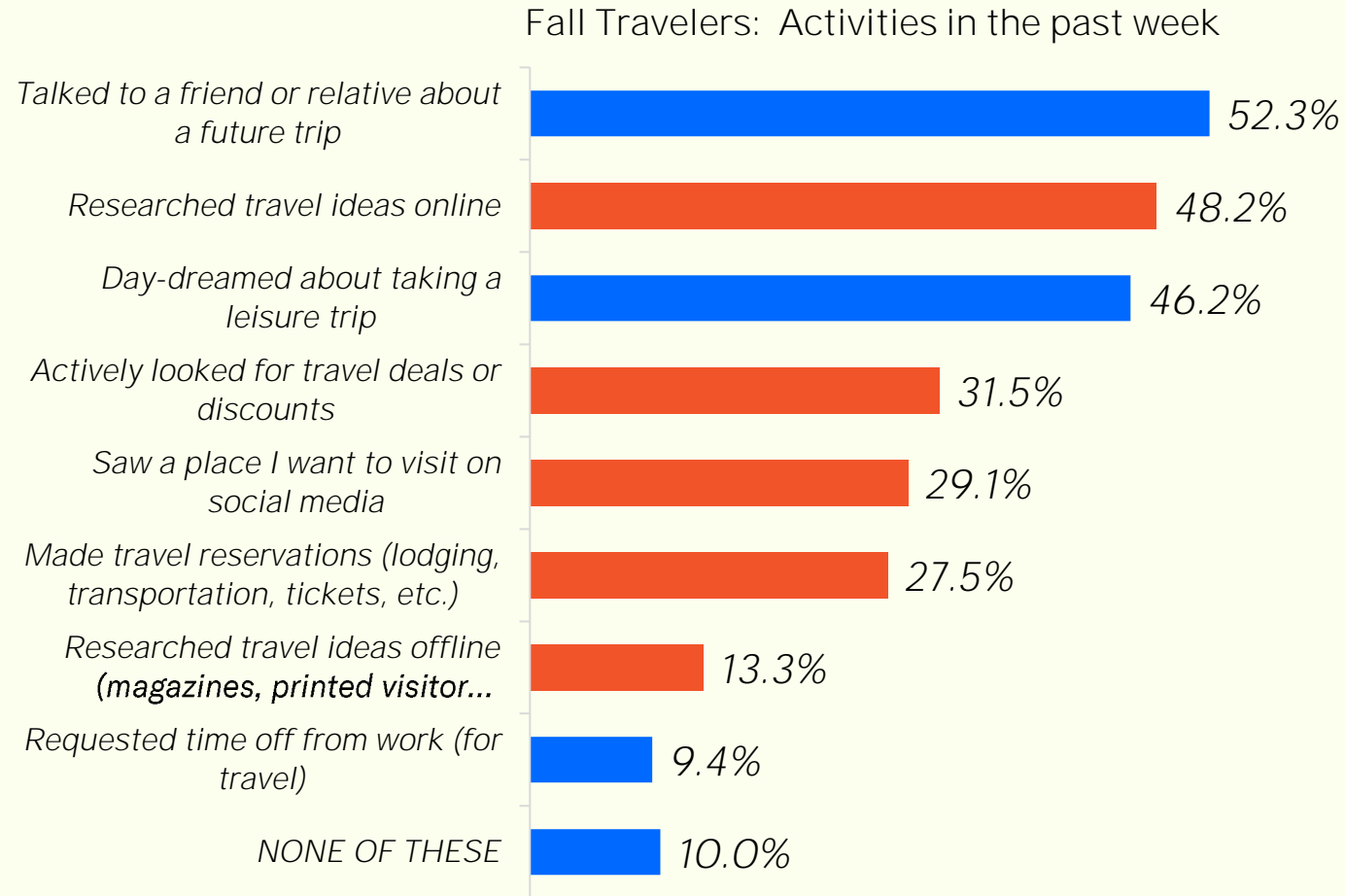


These travelers are out there RIGHT NOW planning their Fall excursions

Question:

In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

In the PAST WEEK I have _____.



Fall travelers tell us to reach them through traditional search, email and social with destination messaging

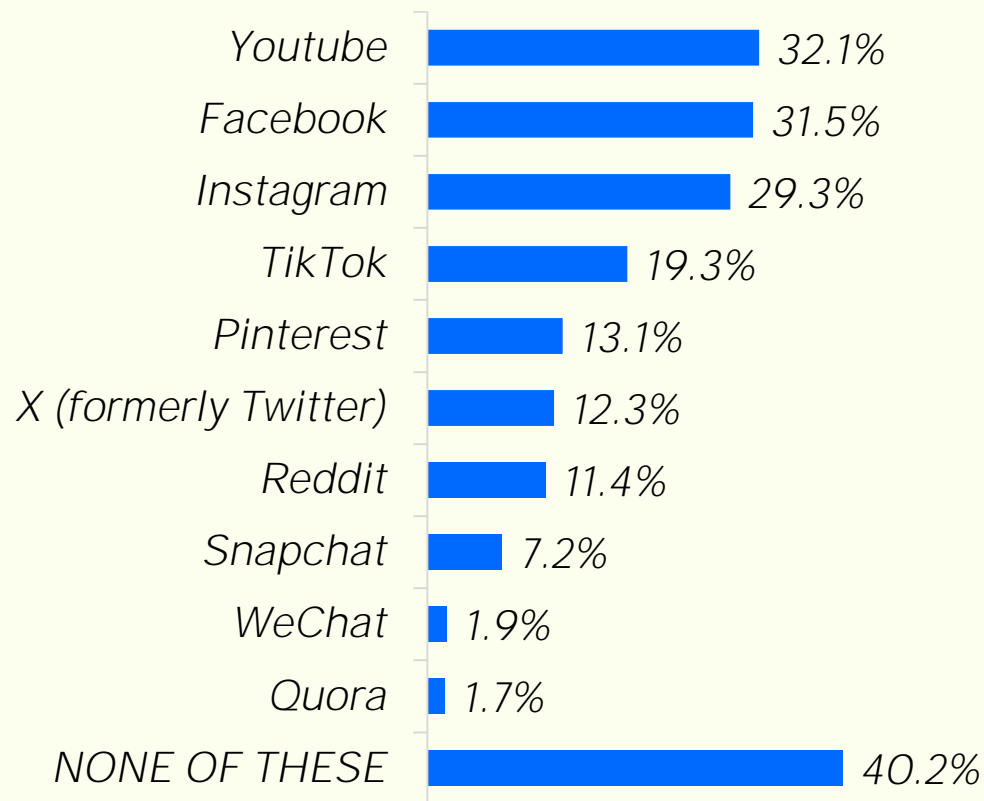
Question:

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?



Social media—particularly YouTube, FB, IG—is a prime means for reaching Fall travelers

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) PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION]*

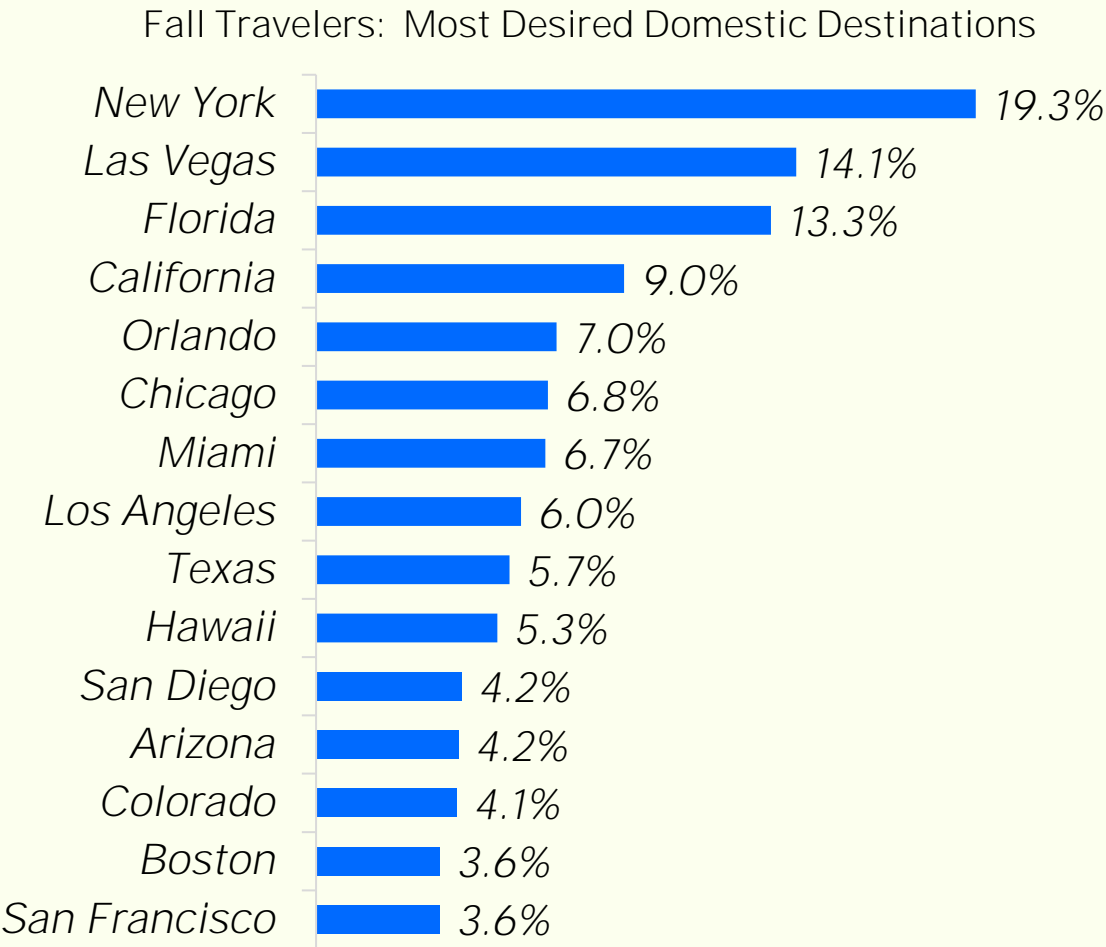


60%

Use social media
resources to plan trips

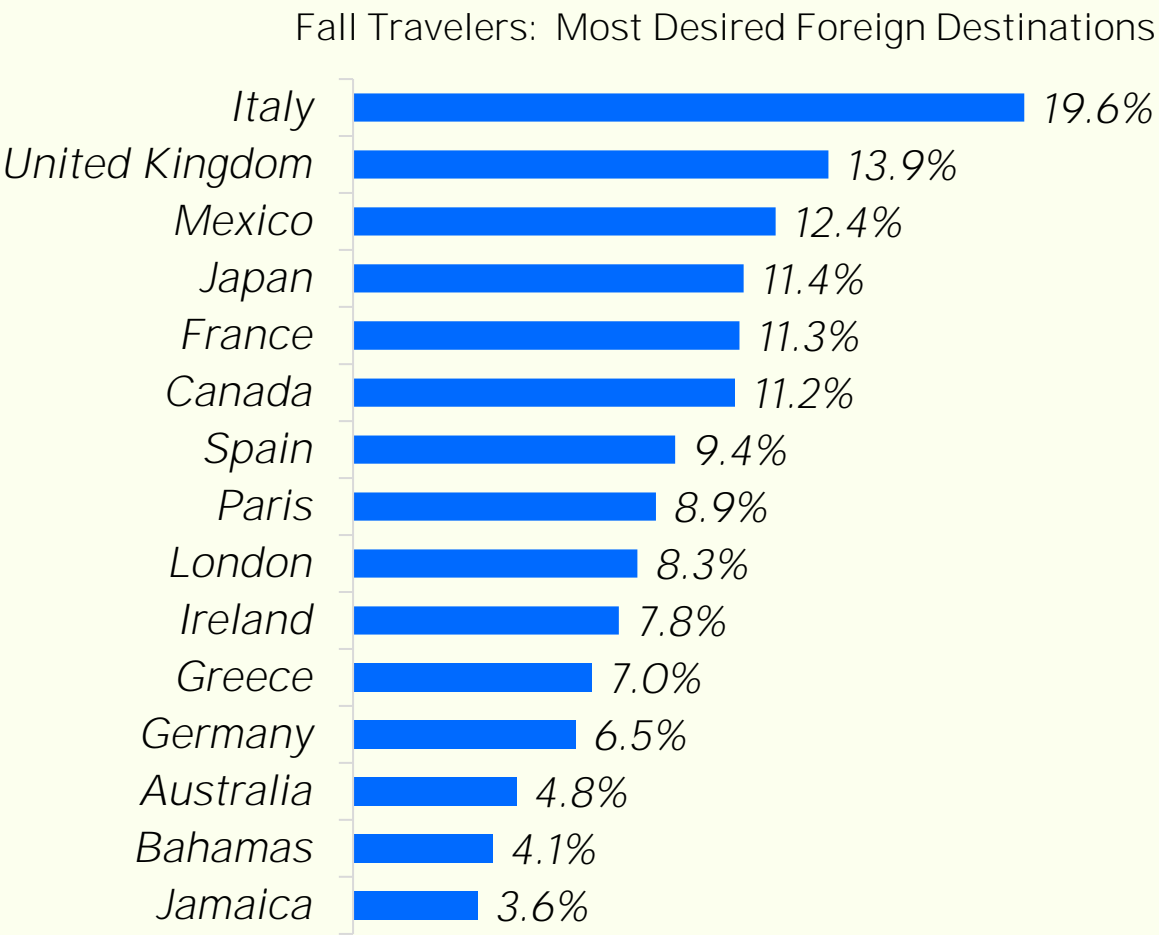
Domestic Hotlist: New York, Las Vegas, Florida and California are Fall travelers' top destinations

Question:
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)



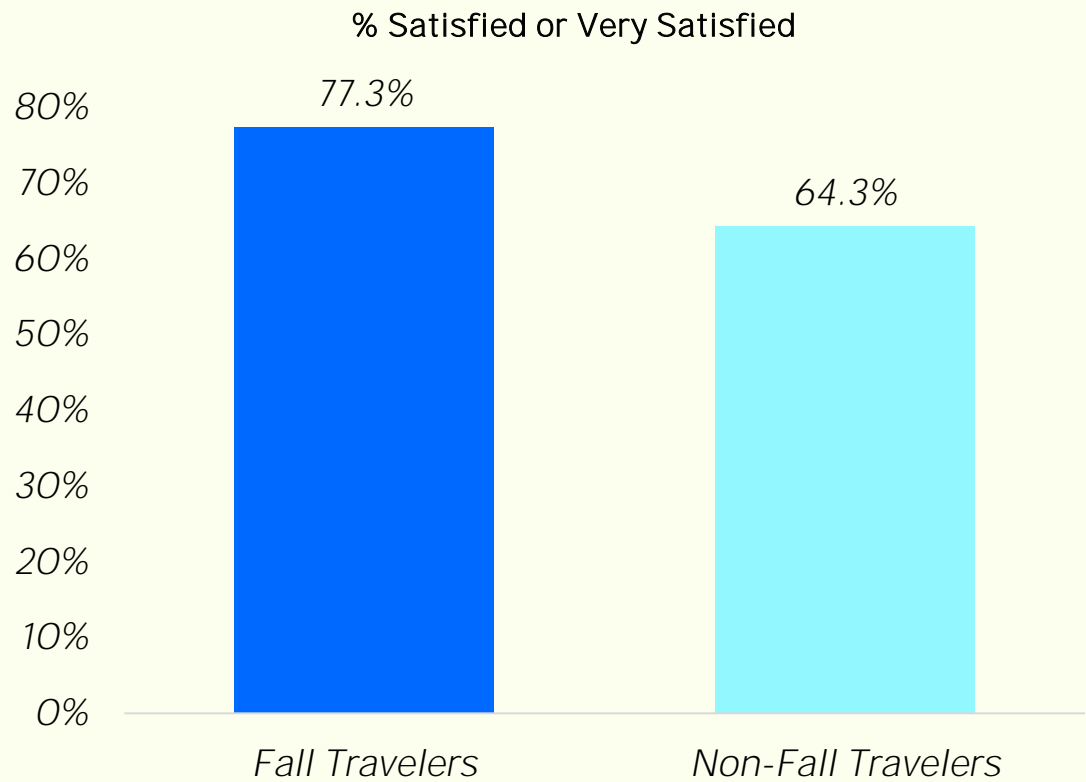
International Hotlist: Italy, the United Kingdom, Mexico and Japan are their top picks.

Question:
*Which FOREIGN DESTINATIONS do you
most want to visit in the NEXT TWELVE (12)
MONTHS? (Write in up to five)*

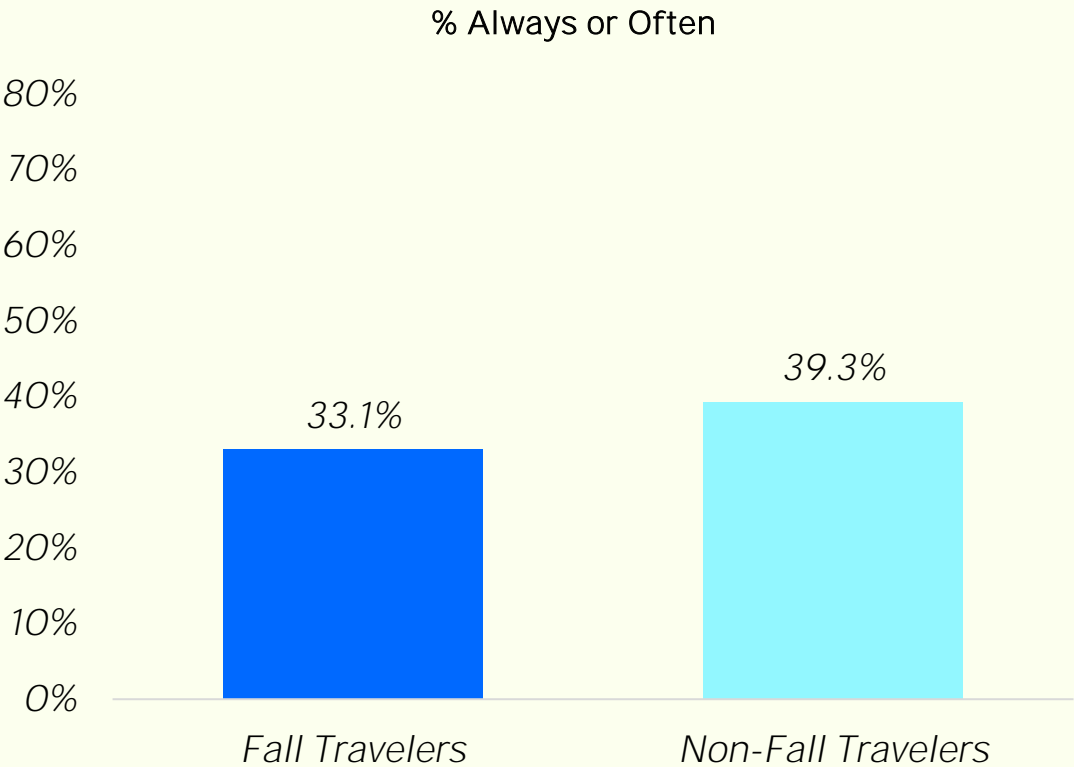


Fall Travelers have higher life satisfaction and lower stress

Question:
How satisfied are you with your life right now?



Question:
How often do you feel elevated levels of stress in your day-to-day life?



Tomorrow

11:00 AM Pacific

*The State of the
American Traveler*
Insights Explorer

Launch Webinar





The State of the American Traveler

Welcome back, Future Partners!



Future Partners

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

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!

Future Partners



Let's keep the conversation going



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[Livestream Calendar](#)

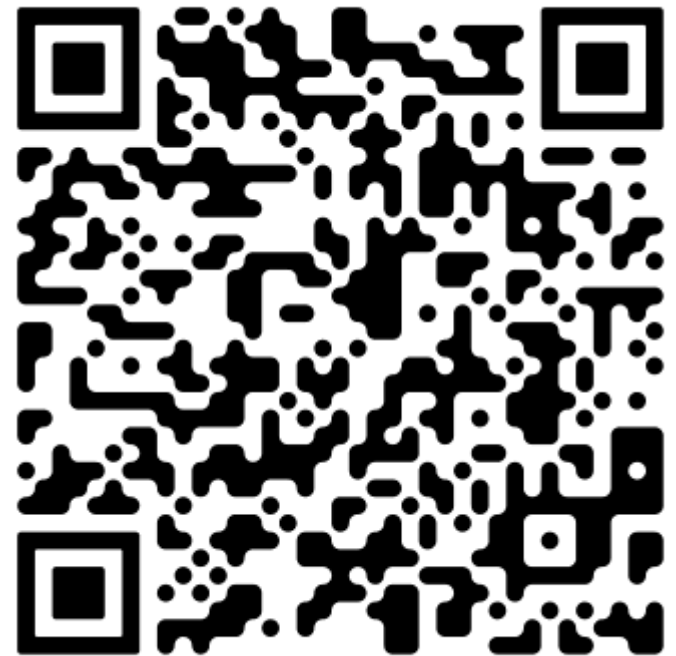


Jennifer Griswold

Director of Partner Engagement

Jennifer@futurepartners.com

Discuss Your Research Needs



Thank You!