



Future Partners

September 2025

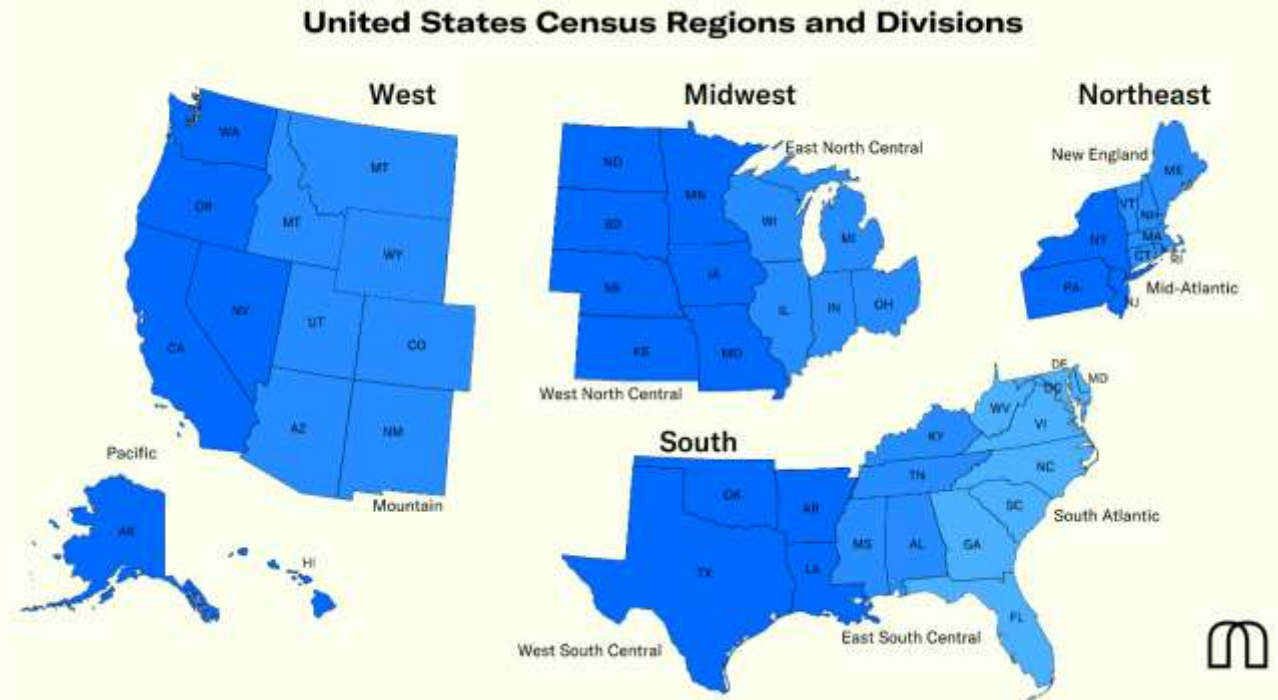
The State of the American Traveler

*Bringing the future of travel
within reach*

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 [August 16-28](#)*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



An aerial night photograph of a city, likely San Francisco, showing the Golden Gate Bridge and surrounding urban areas with city 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

Today

● Travel Sentiment Overview

Special Segments:

● FIFA and Route 66 Travelers

● Urban Icons: CMOs on Captivating & Competing for Travelers in Challenging Times

Traveler Sentiment



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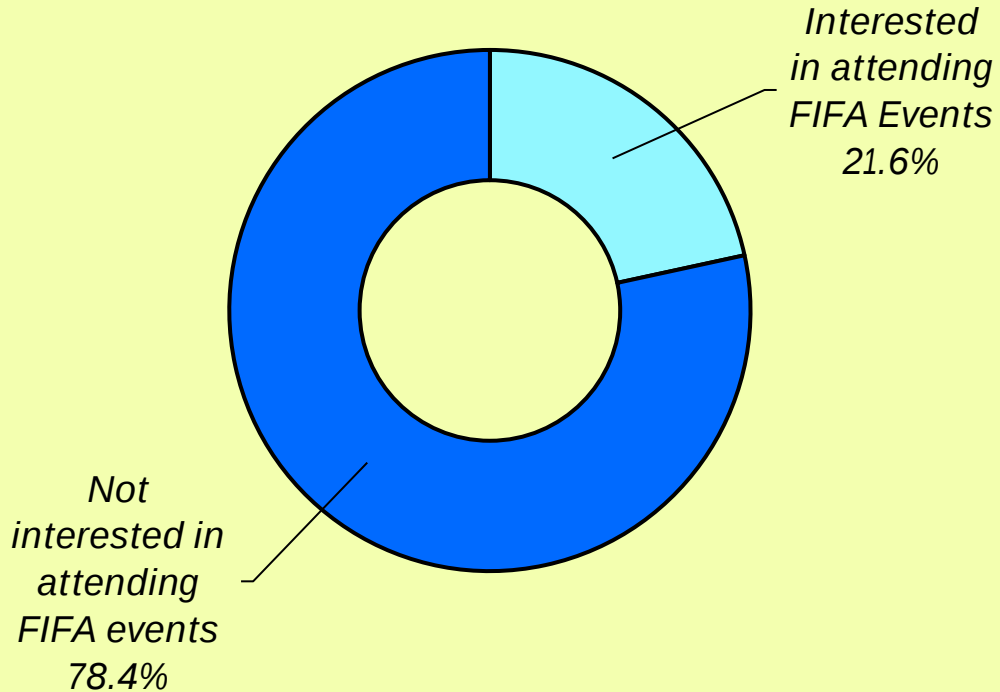


The Story of the Data

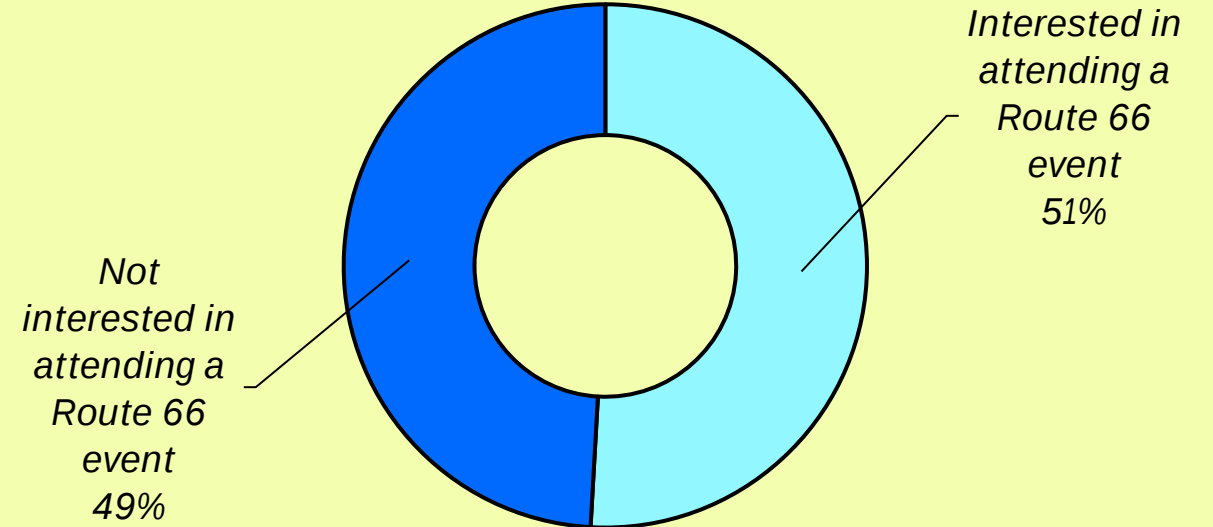
- Traveler financial sentiment slipped this month, reversing two months of improvement.
- Excitement for leisure travel eased slightly but continues to hold near record highs.
- 85% of travelers currently have at least one trip tentatively planned.
- While the share of household budgets devoted to travel is steady compared to last year, expected annual travel spend has climbed to a new peak.
- Expectations of a U.S. recession this year remain unchanged from the prior month.
- Consistent with recent patterns, two in three American travelers anticipate adjusting their travel behaviors in response to economic uncertainty.

Two Points of Reference

**FIFA World Cup
Interested Travelers**



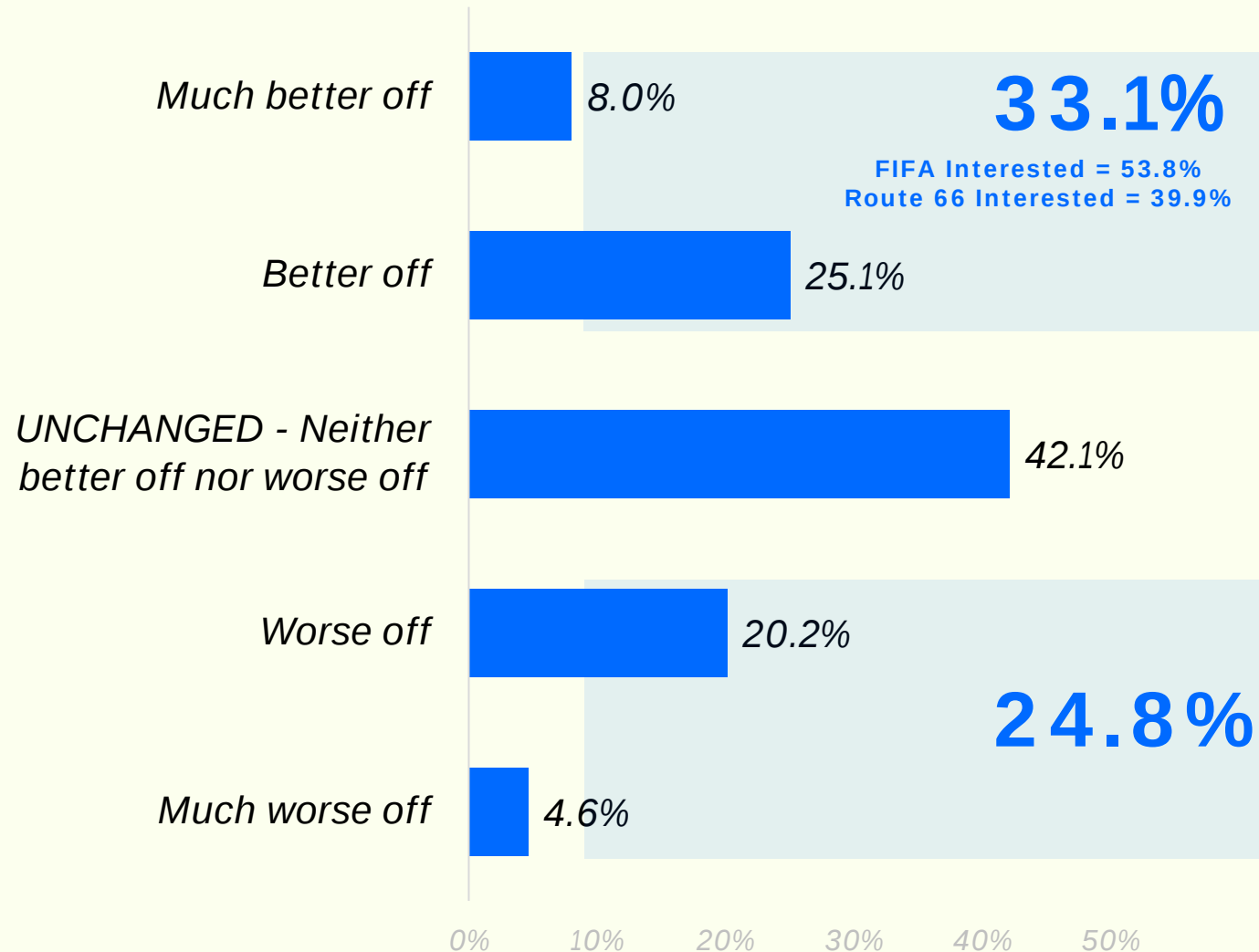
**Route 66 Anniversary
Interested Travelers**



Traveler Financial Sentiment Declines After Recent Gains

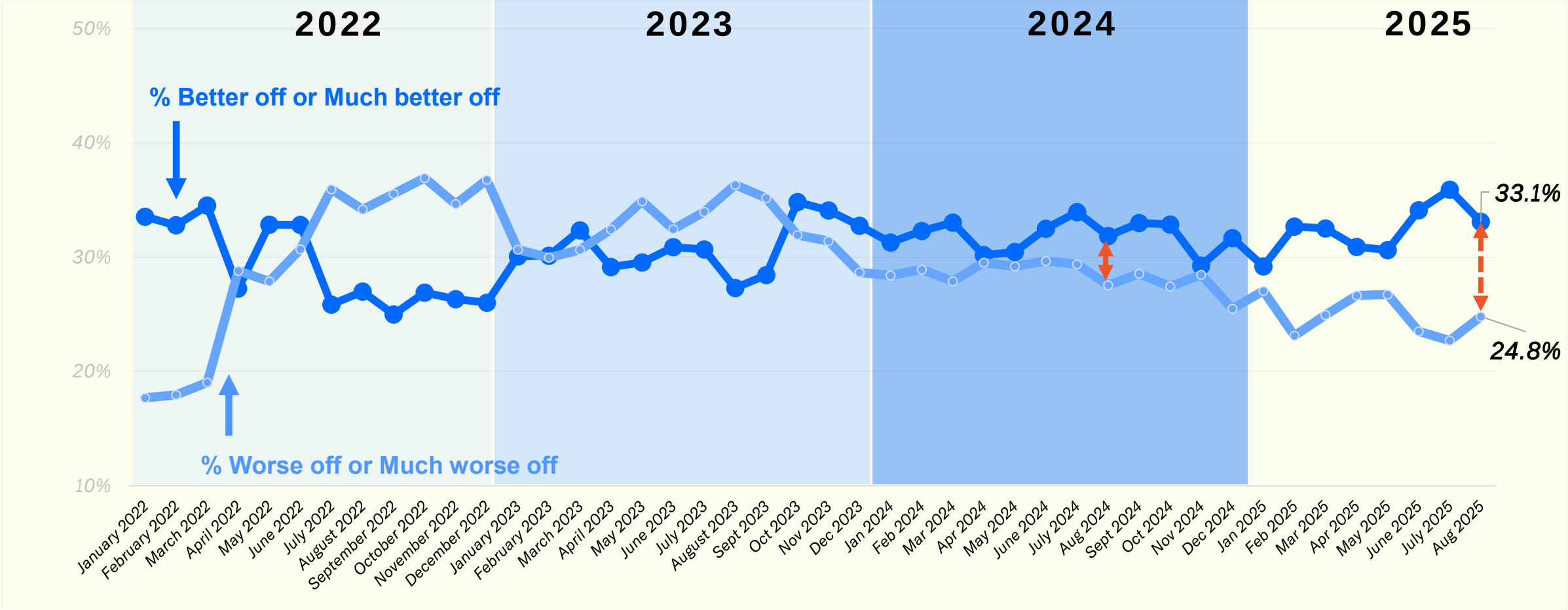
Question:

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



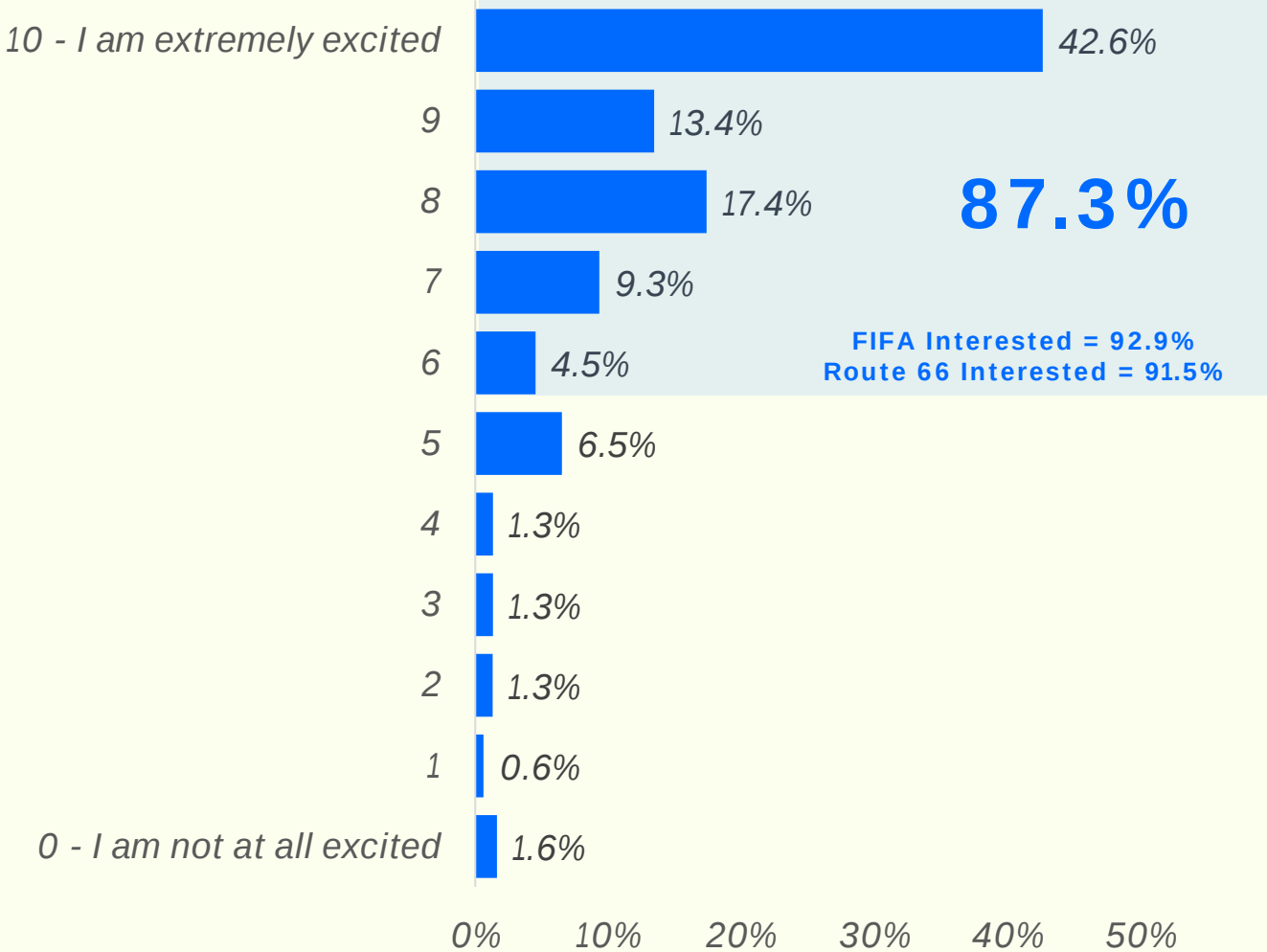
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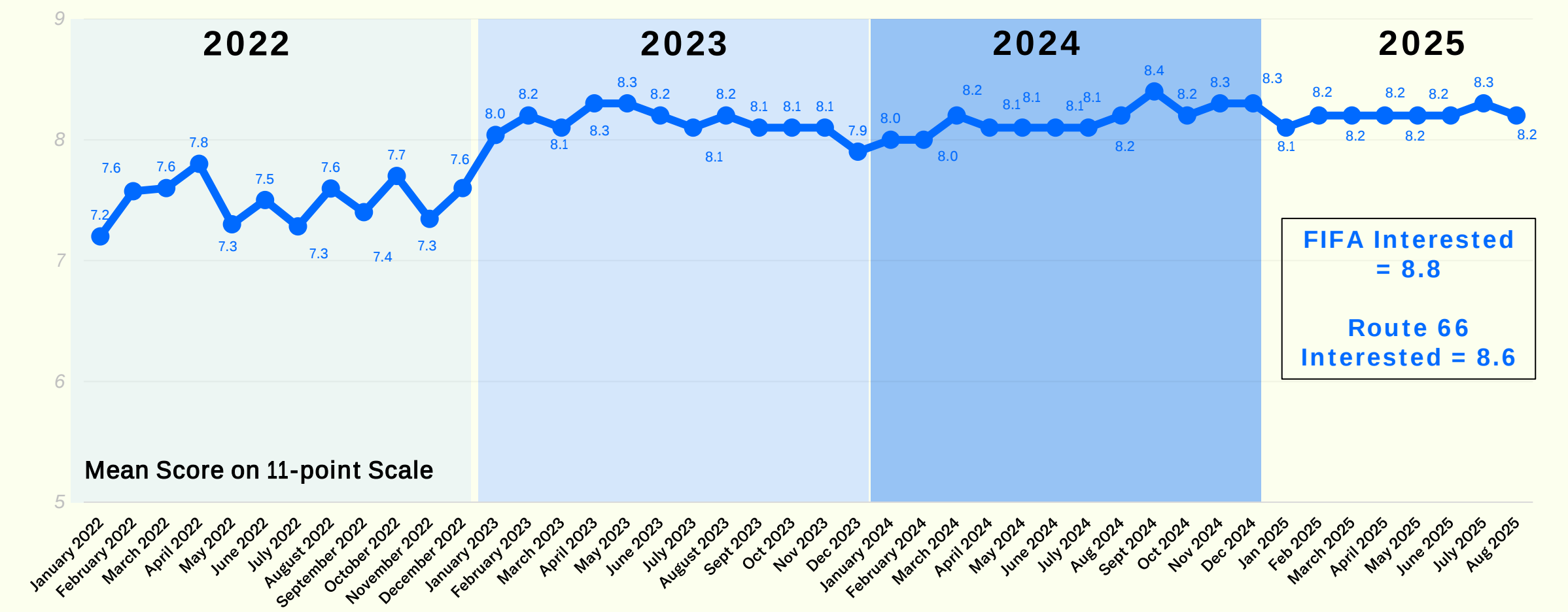
Americans' Excitement for Travel Remains Elevated

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



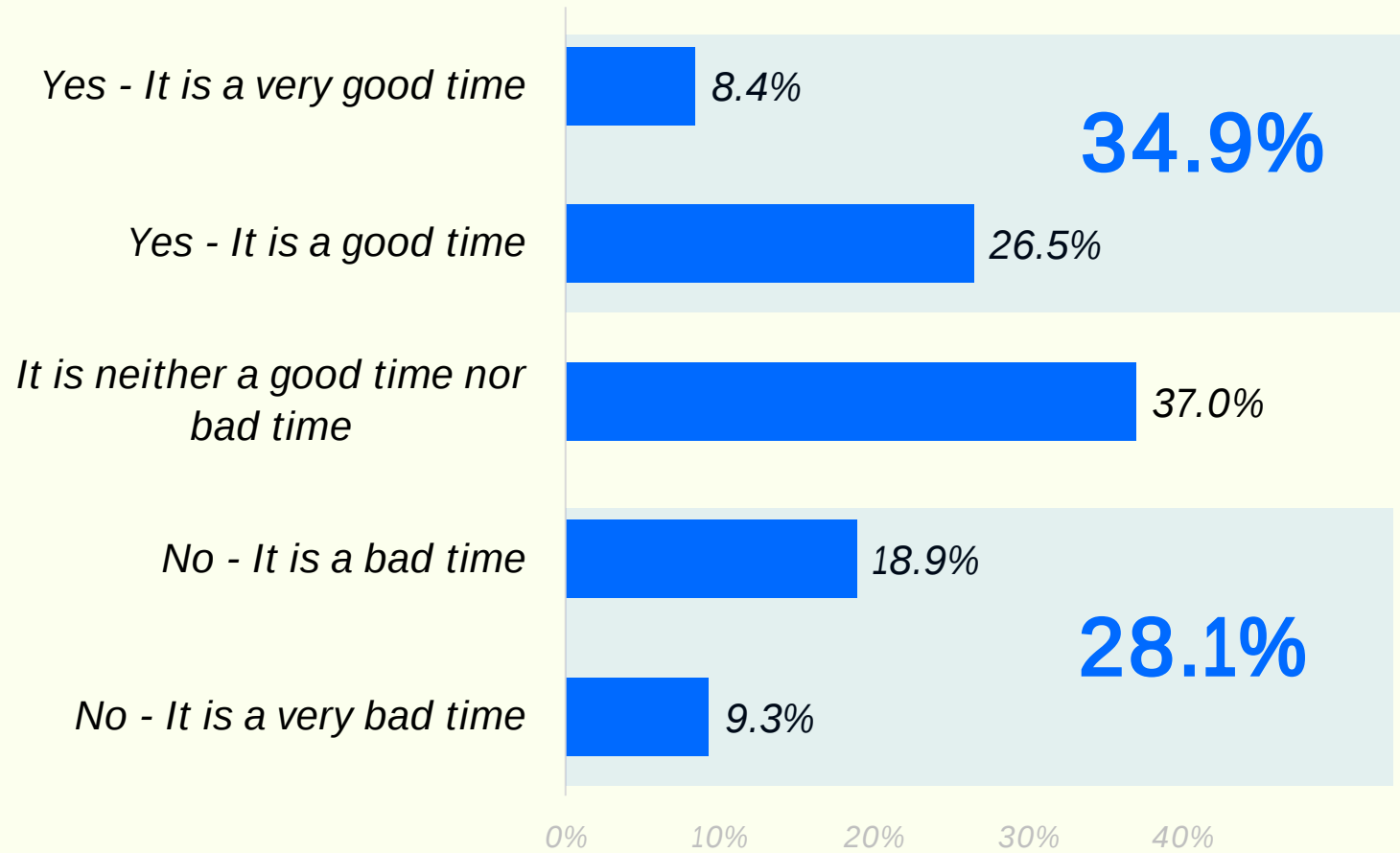
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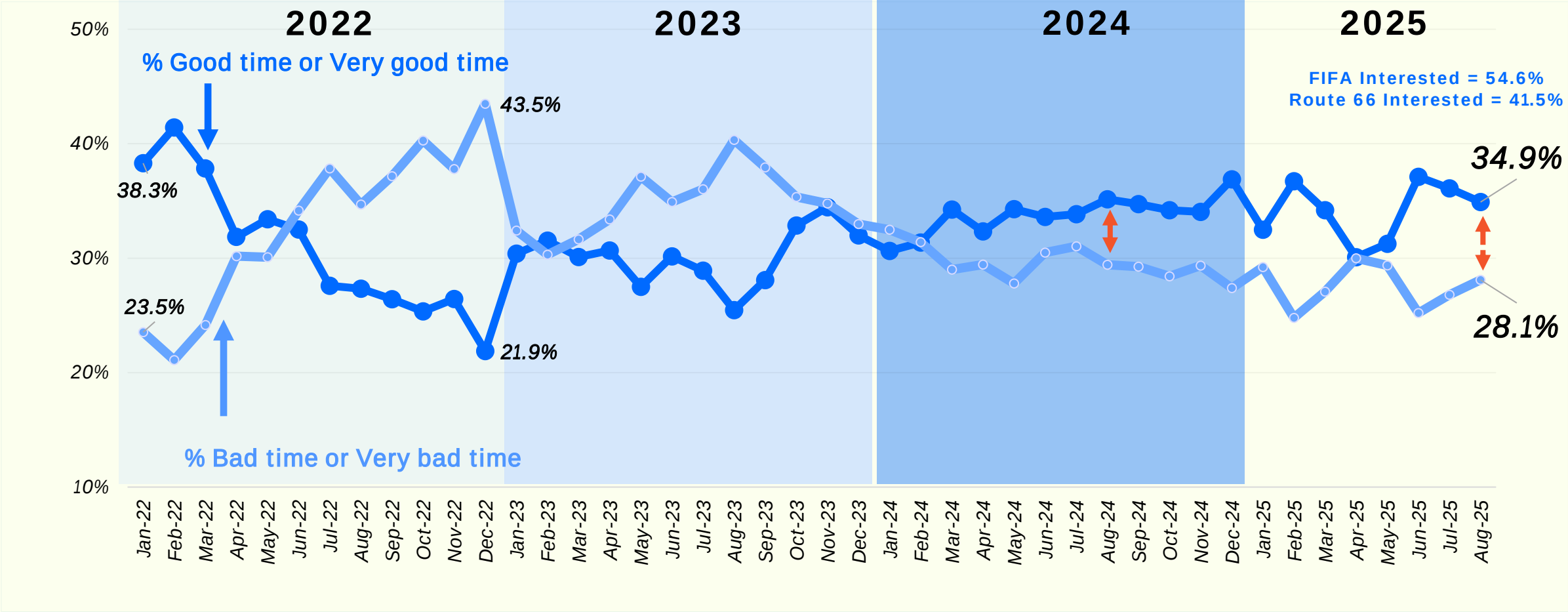
Confidence that now is a good time for leisure travel spending slips slightly

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?



Confidence That Now is a Good Time for Leisure Travel Spending Slips 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?



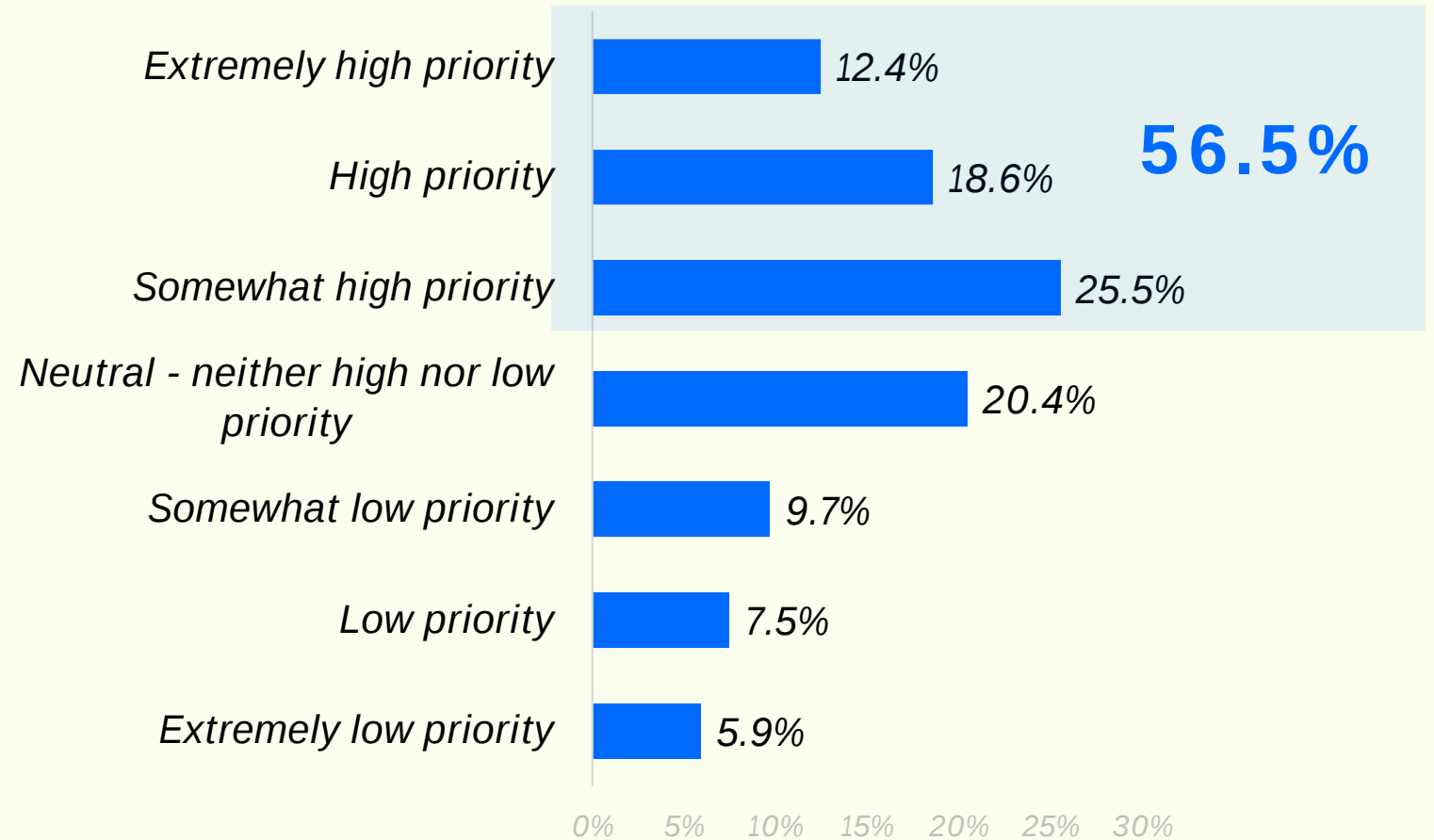
Travel as a Budget Priority Slips Below Last Year

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.

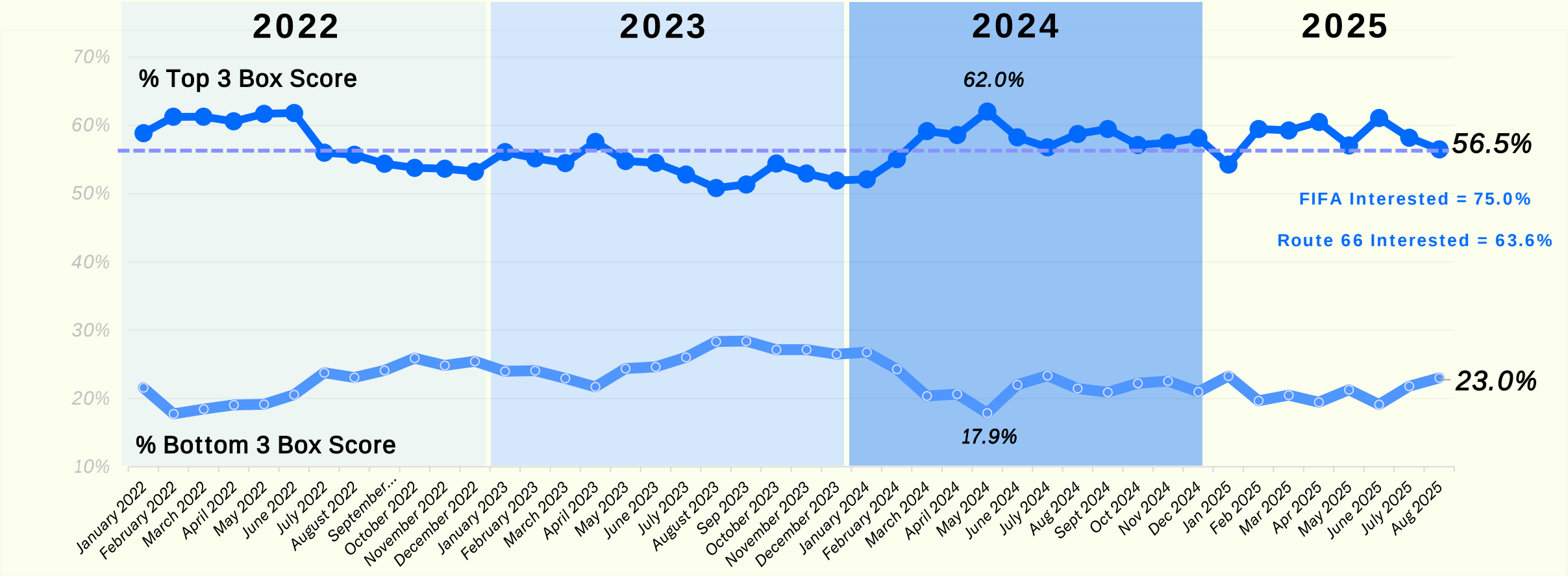
Leisure travel will be a(n)

_____.



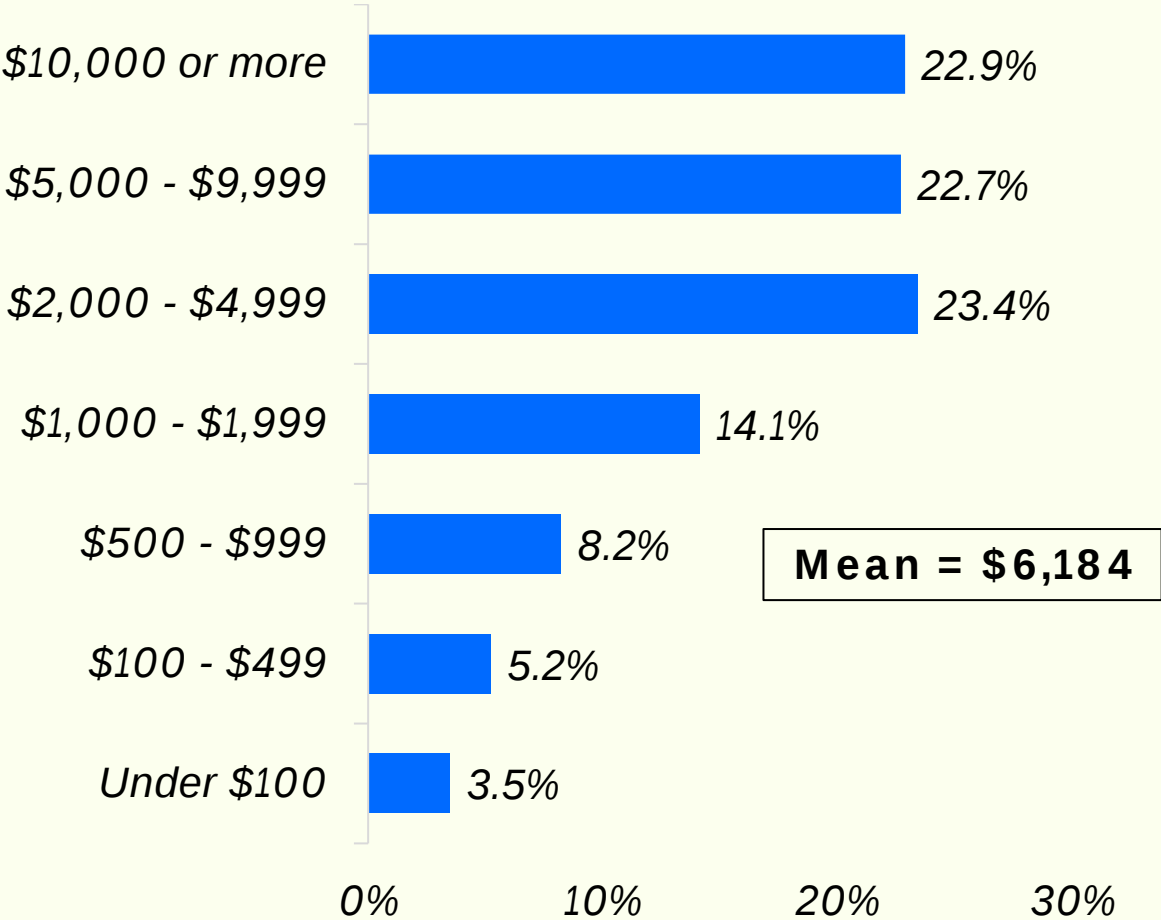
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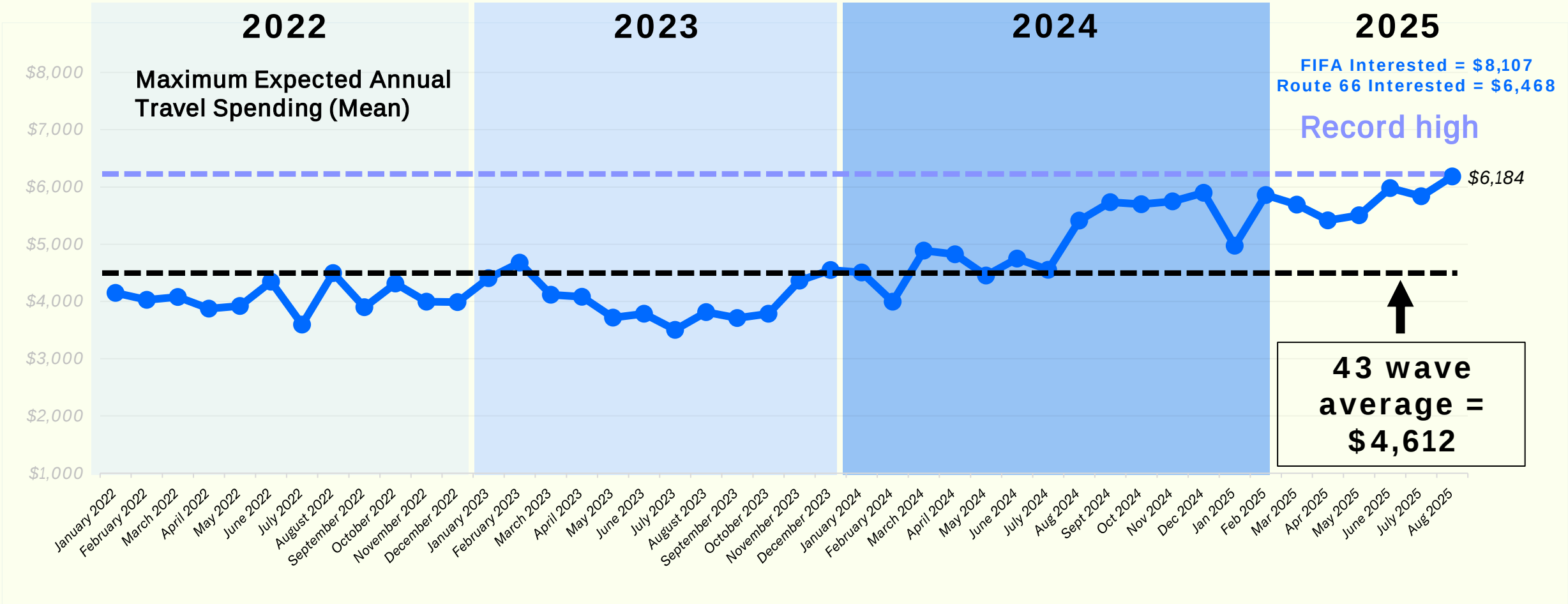
Expected Travel Budgets Reach a New High

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 Travel Budgets Reach a New High

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):



Looking Forward

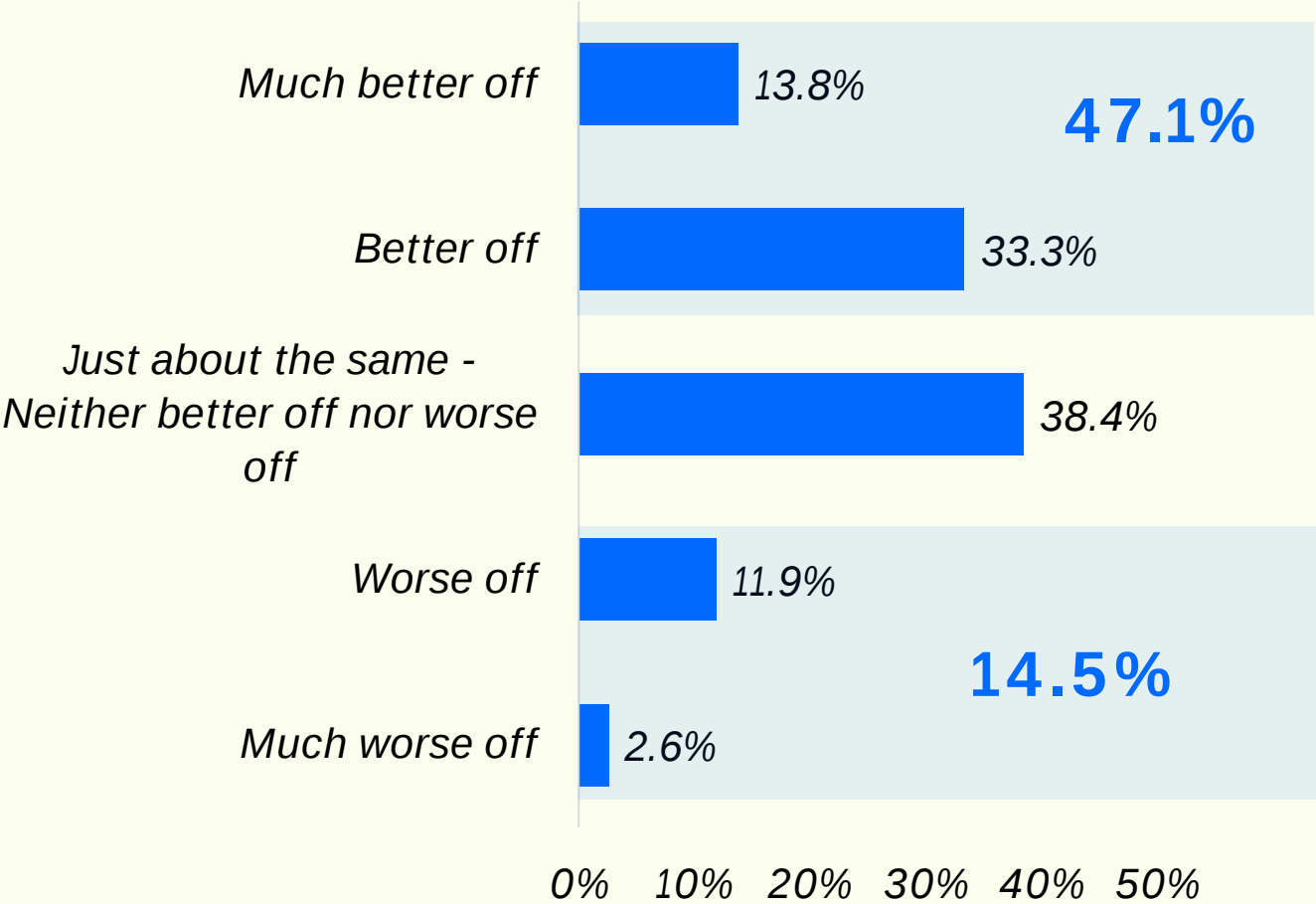
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Traveler Confidence in Financial Future Improves Again

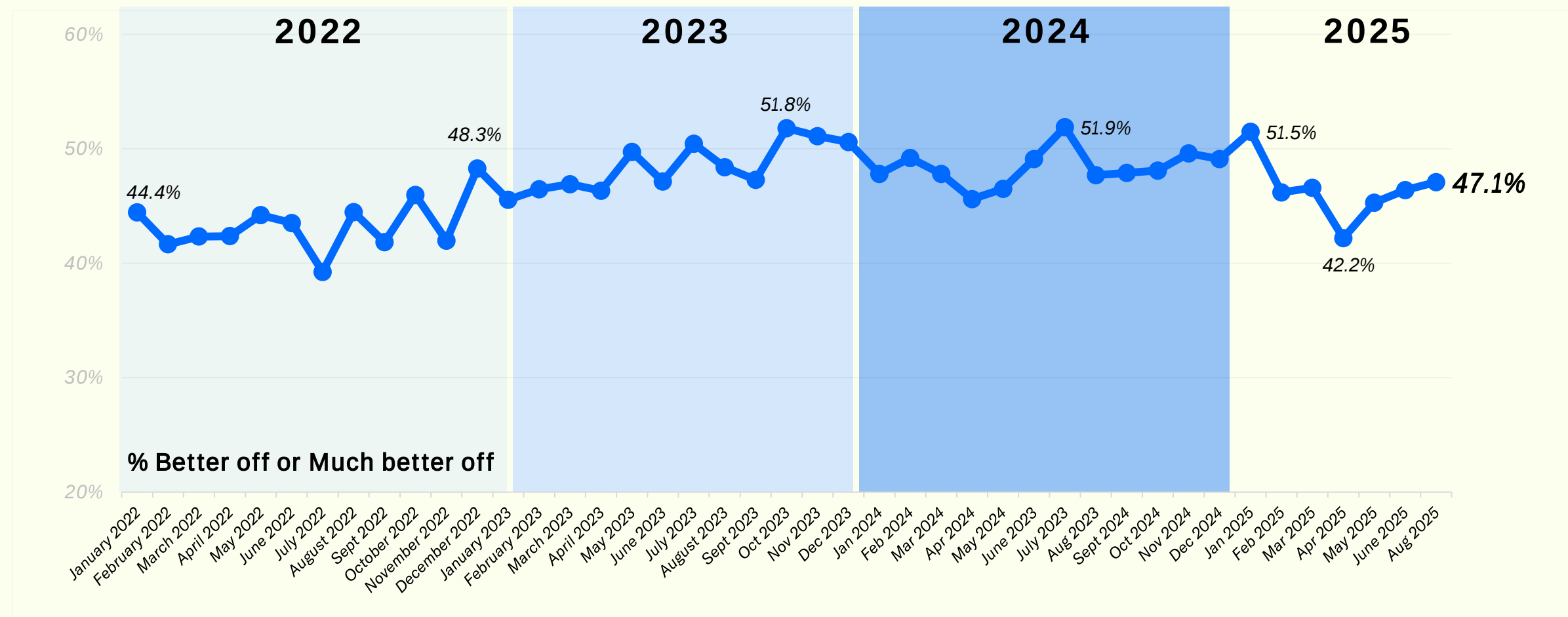
Question:

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?



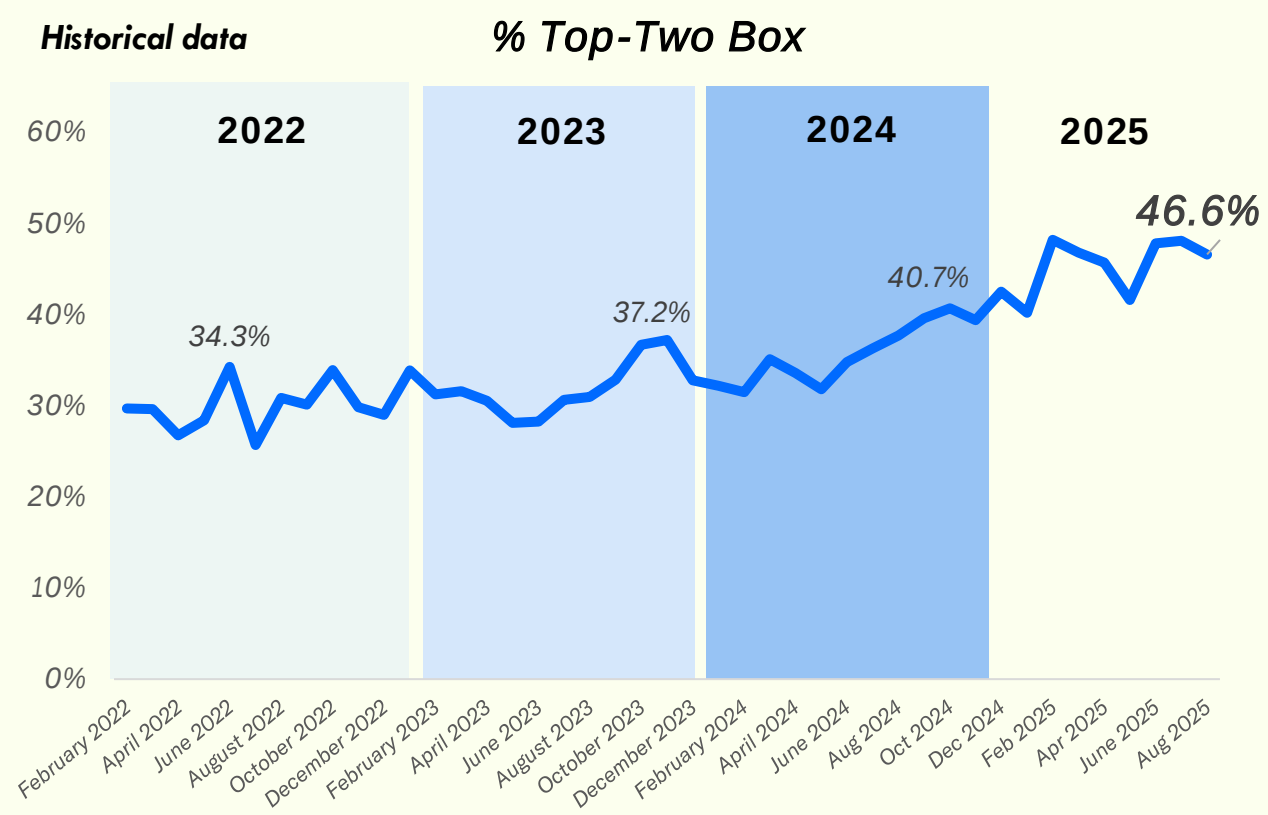
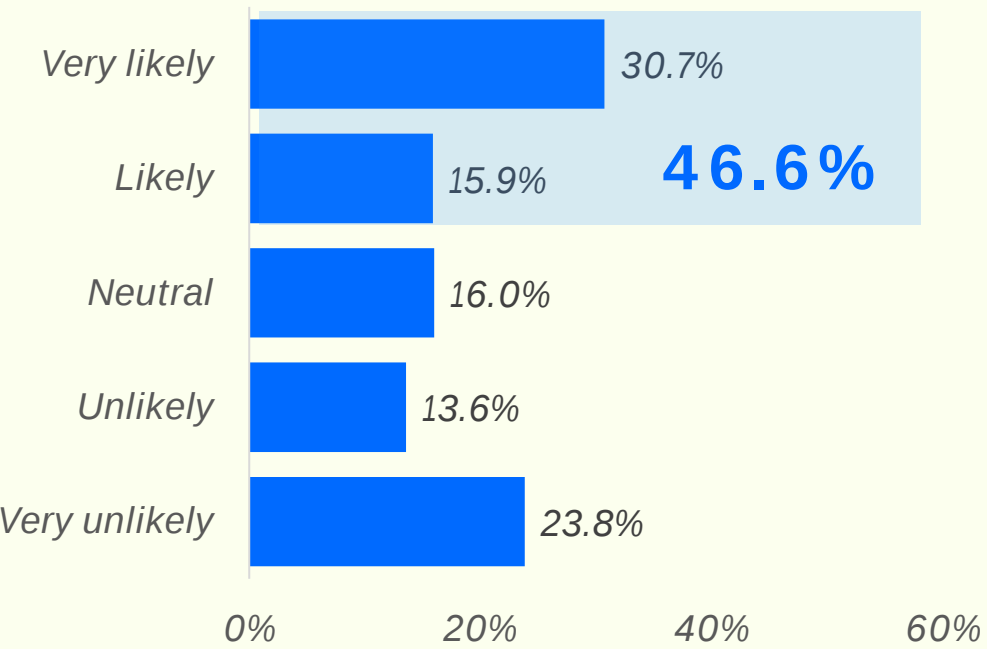
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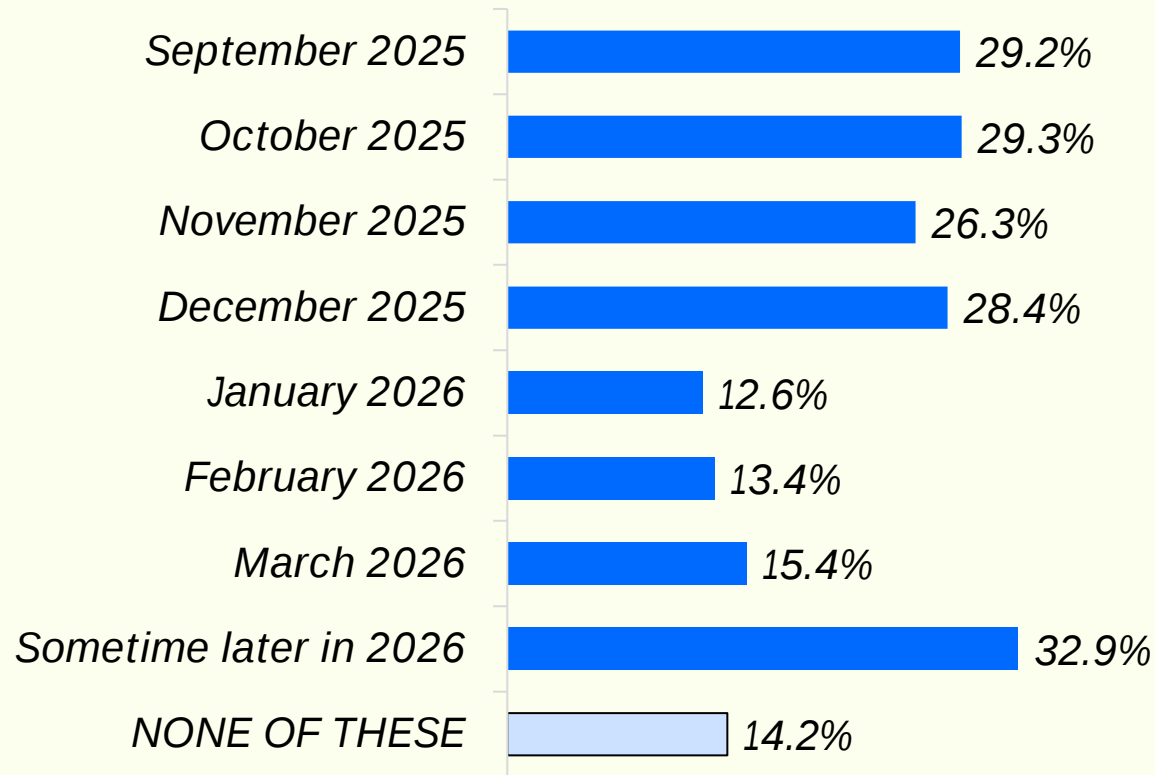
International Travel Expectations Decline This Month

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



Nearly 86% of Travelers Have at Least One Trip Currently Planned

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

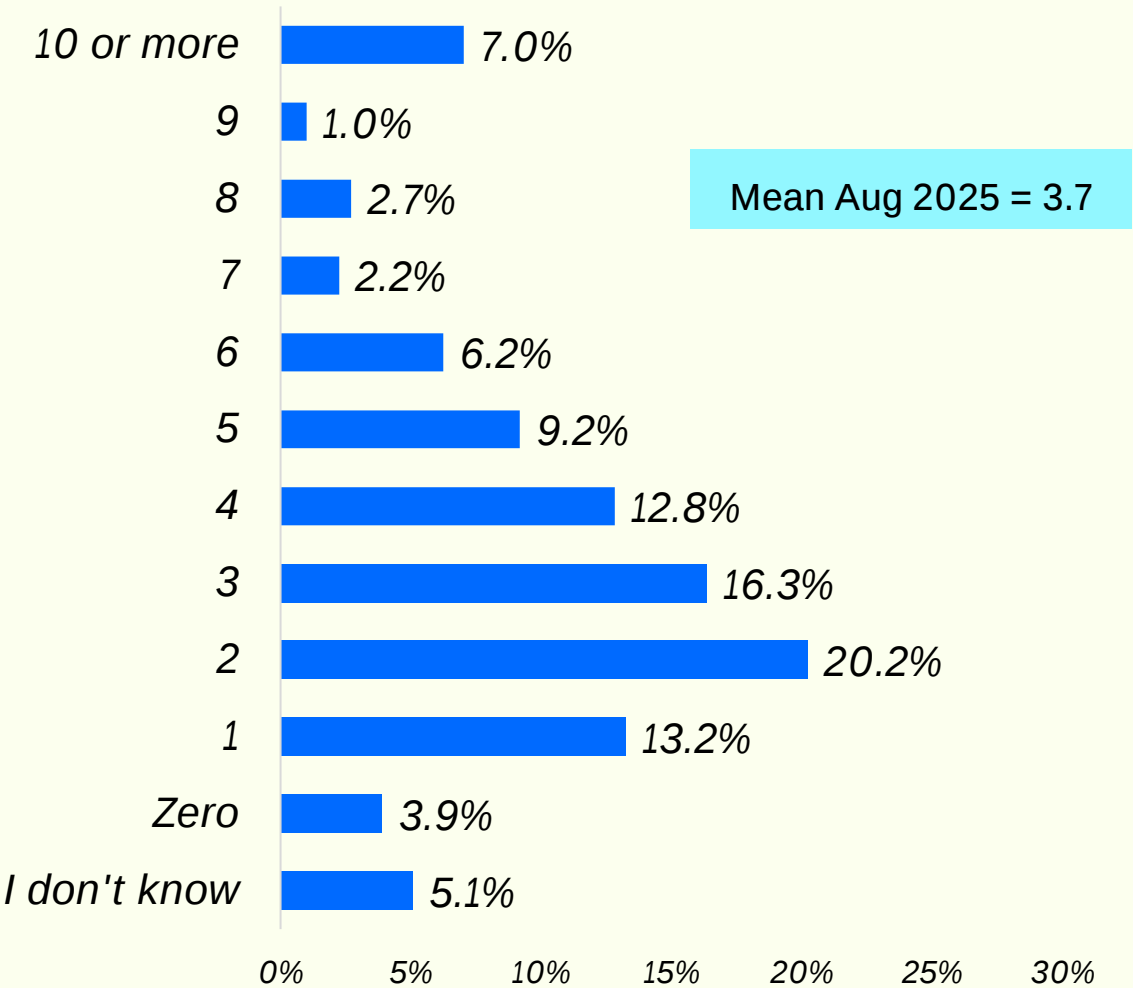


85.8%

have at least one trip
currently planned

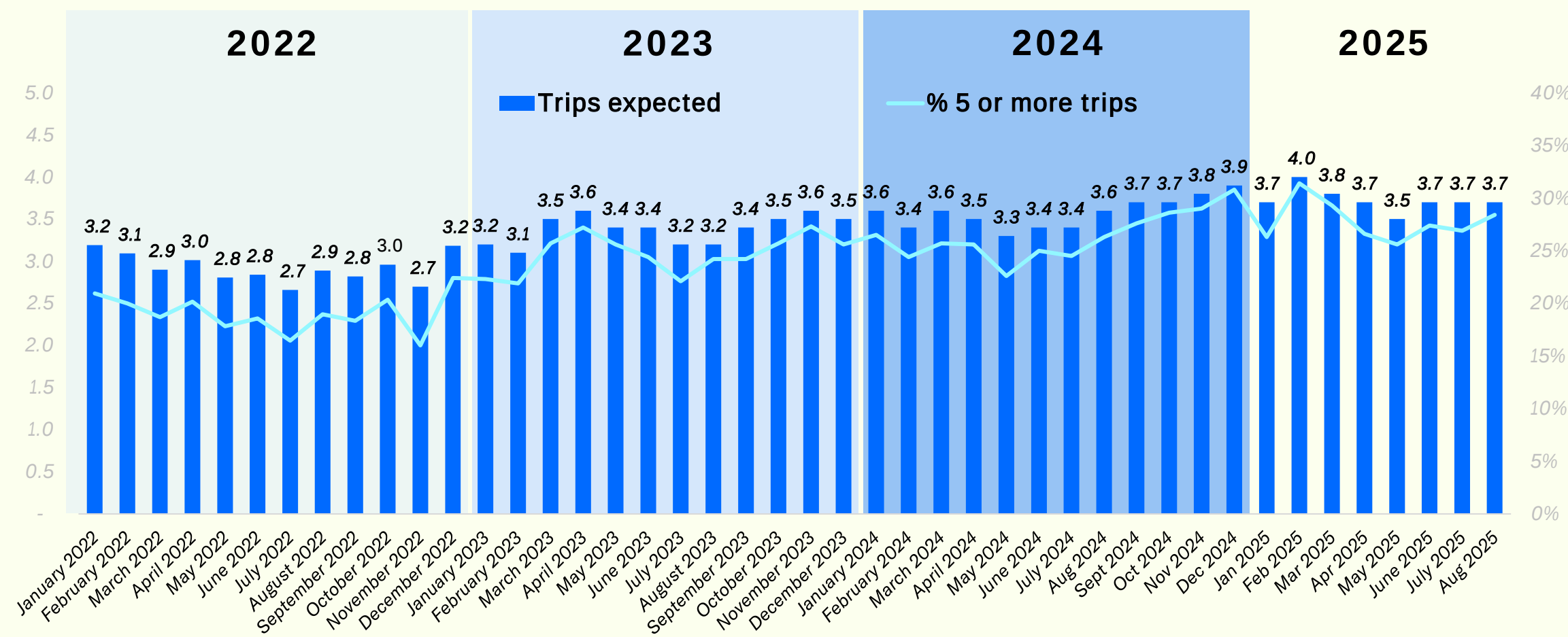
Expected Trip Volume Holds Steady This Month

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?



Expected Trip Volume Holds Steady This Month

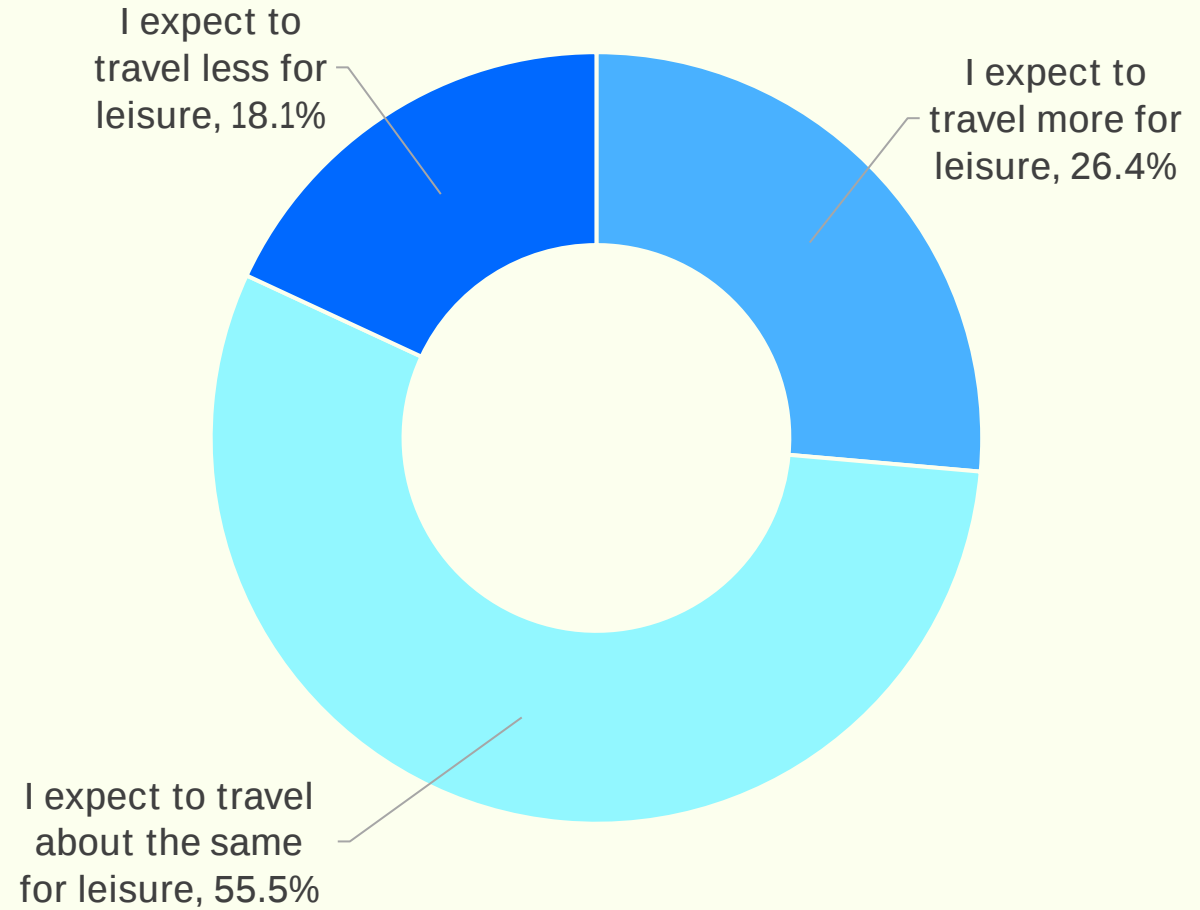
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Plans to Travel More Next Year Decline

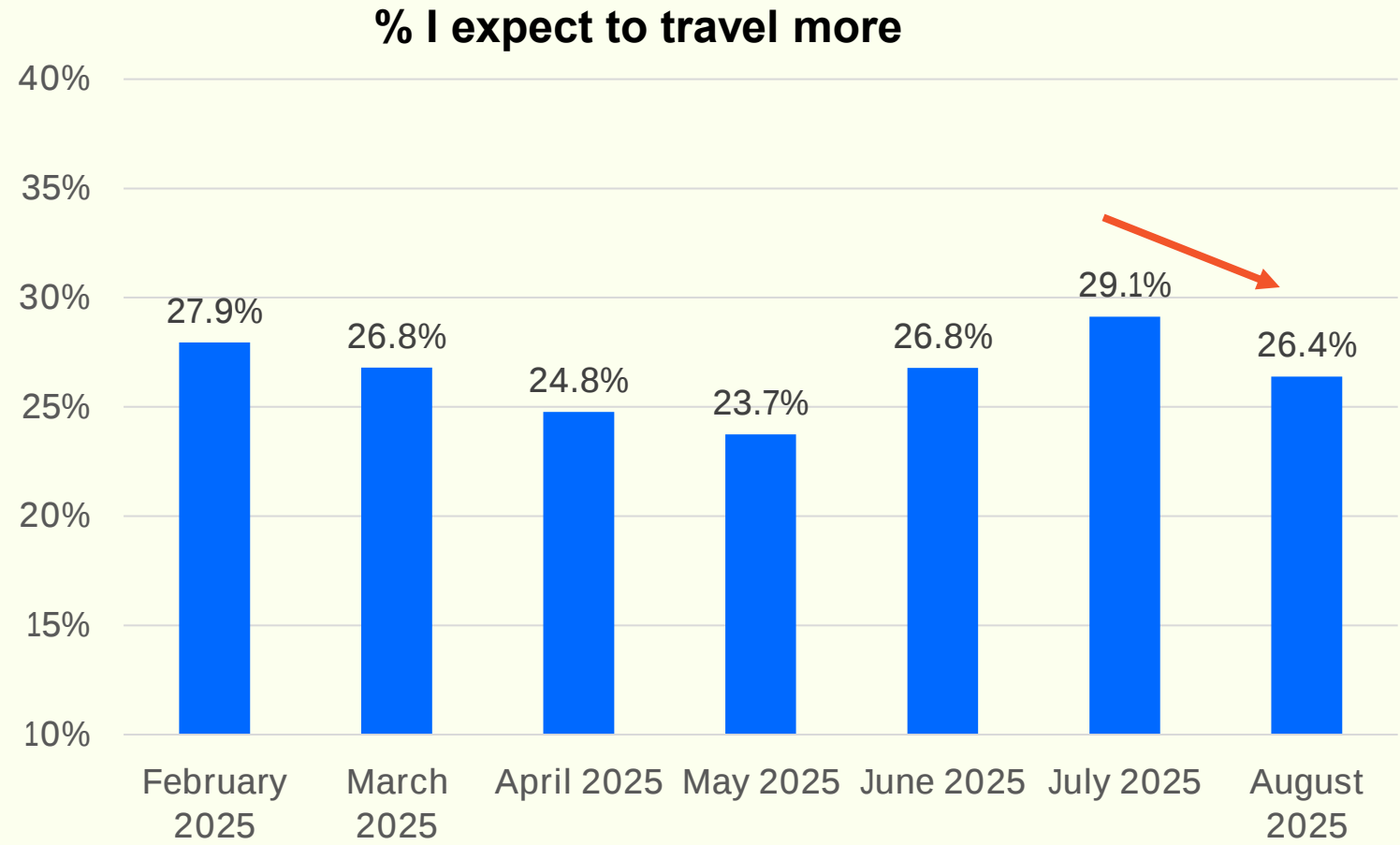
Question:

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 Next Year Decline

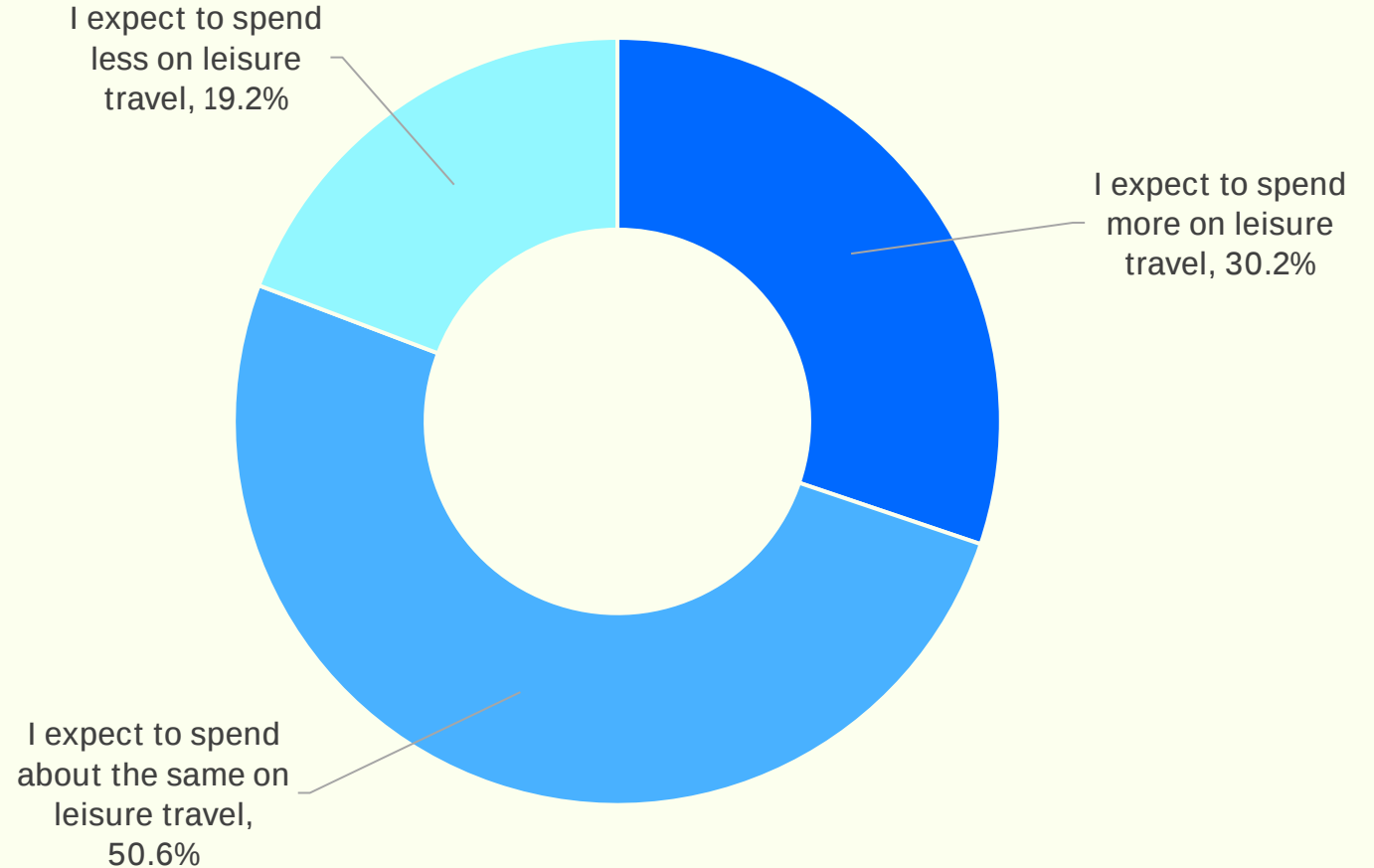
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Travel Spending Expectations Follow the Same Trajectory

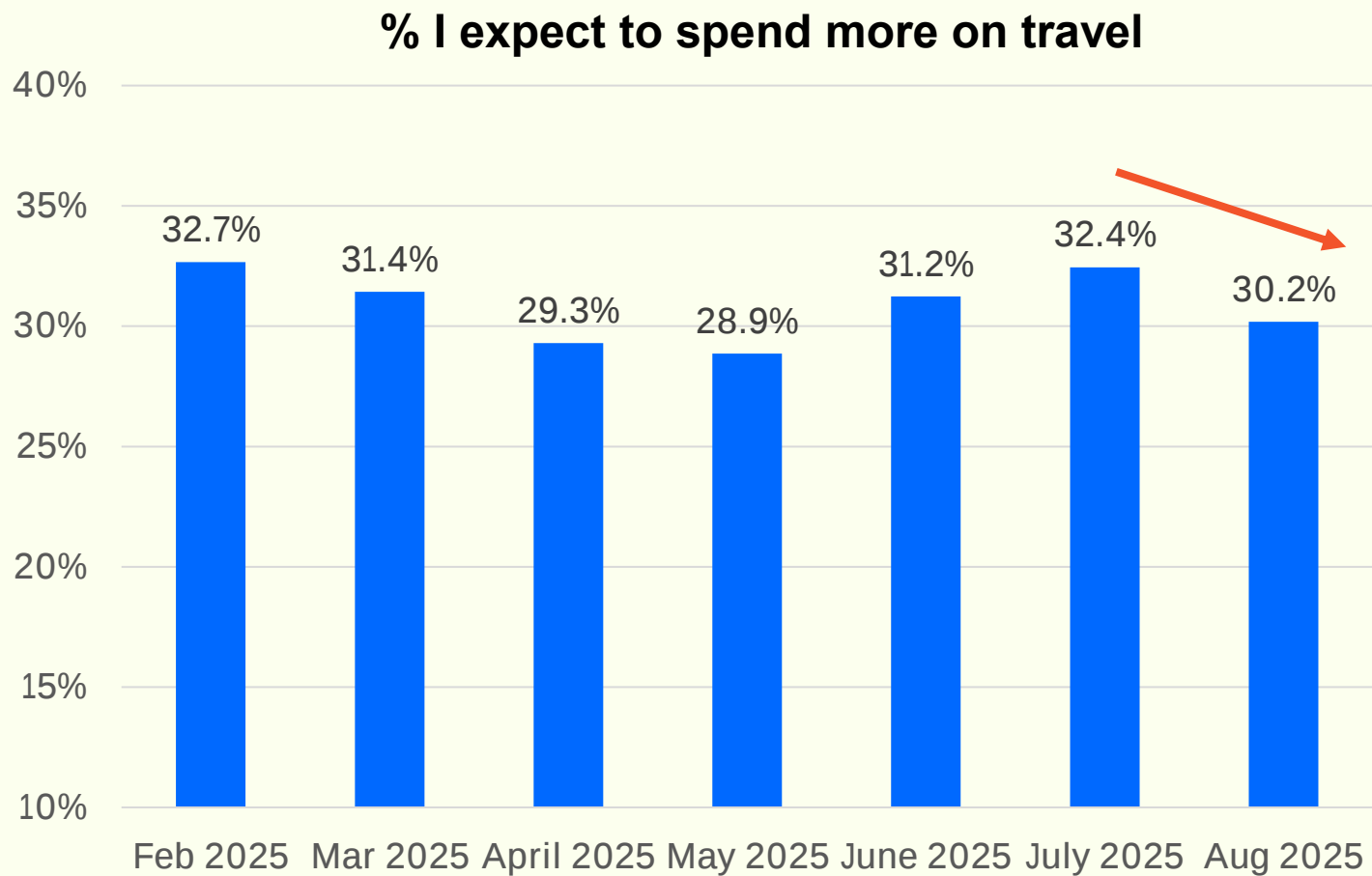
Question:

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 Follow the Same Trajectory

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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)

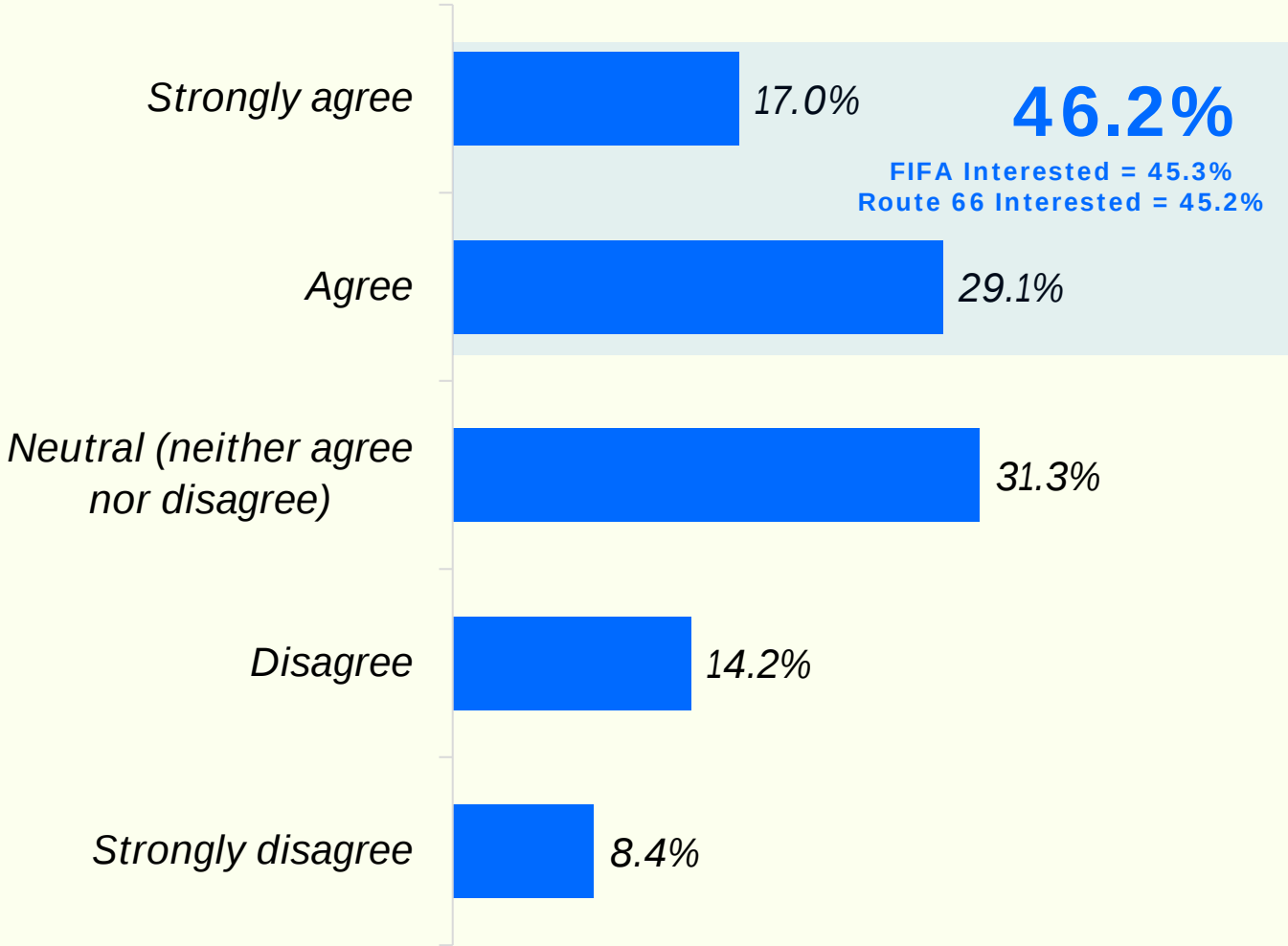


**How are Americans
adapting to the current
economic situation?**

Recession Concerns Among American Travelers Unchanged This Month

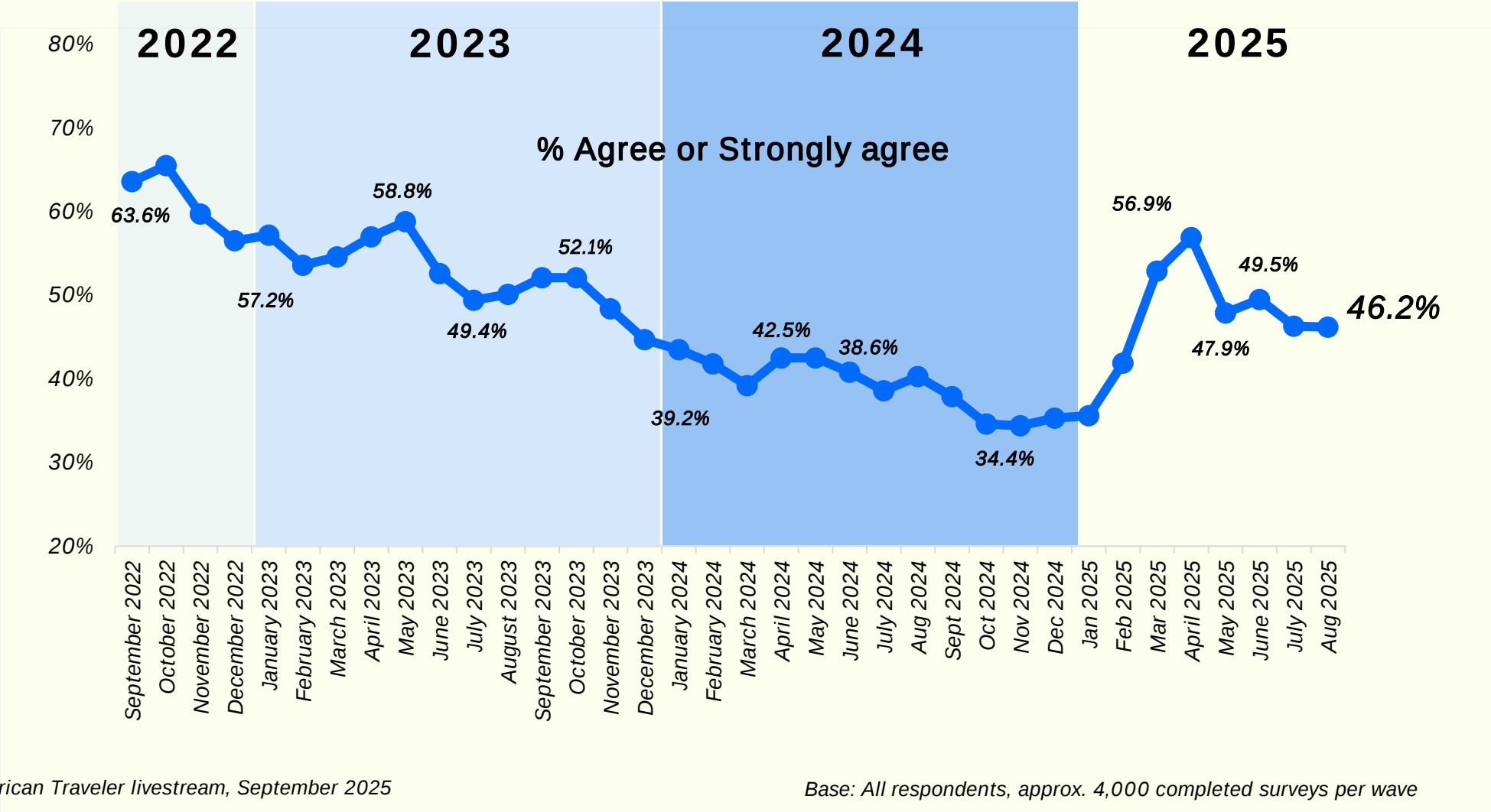
Question:

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



Recession Concerns Among American Travelers Unchanged This Month

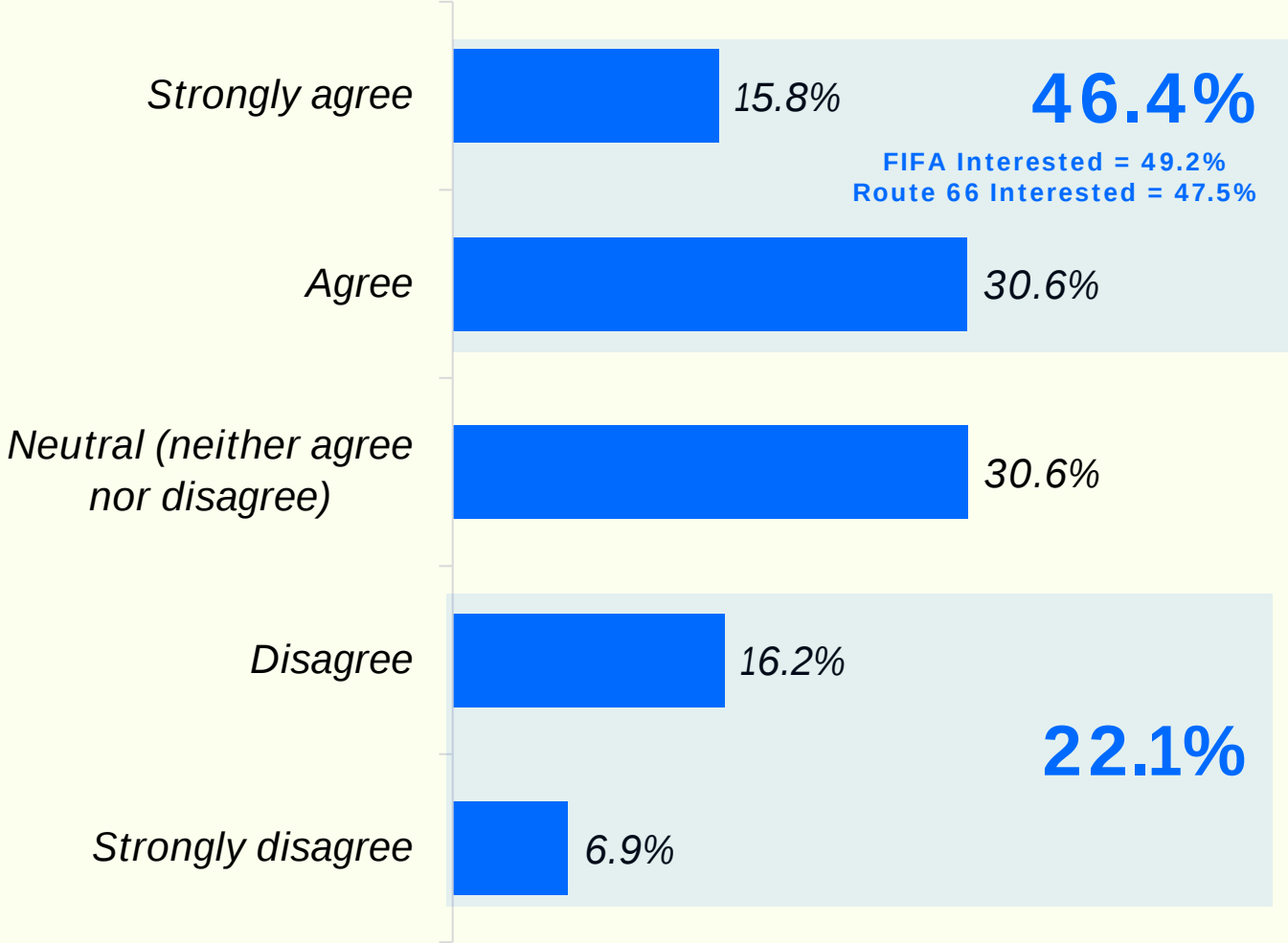
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Nearly Half of Travelers Cautious With Money Amid Economic Concerns

Question:

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

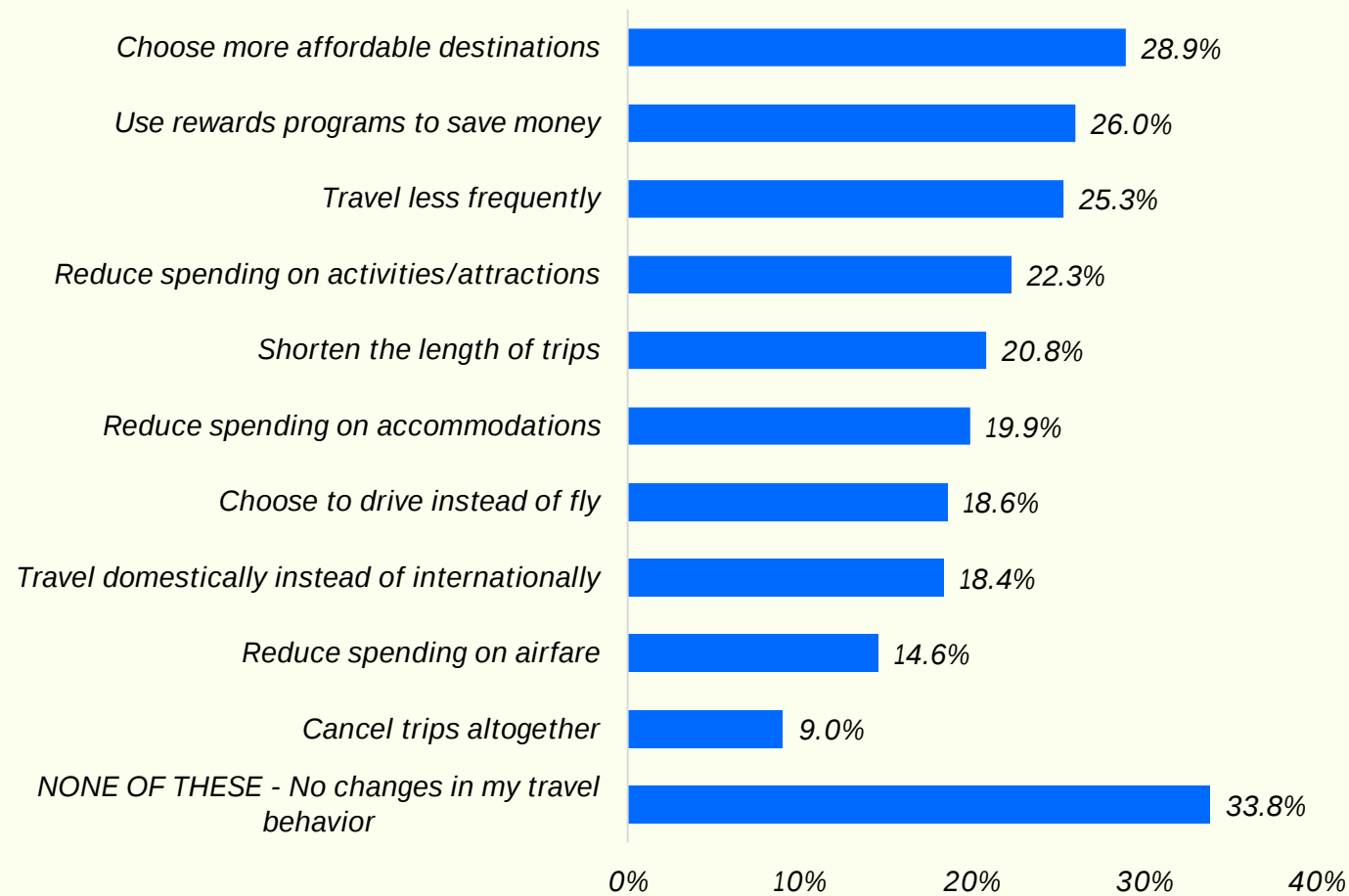


**2-in-3 American travelers
expect to change their
behaviors due to economic
conditions.**

Two-Thirds of Travelers Plan to Adjust Behavior Due to Economic Concerns

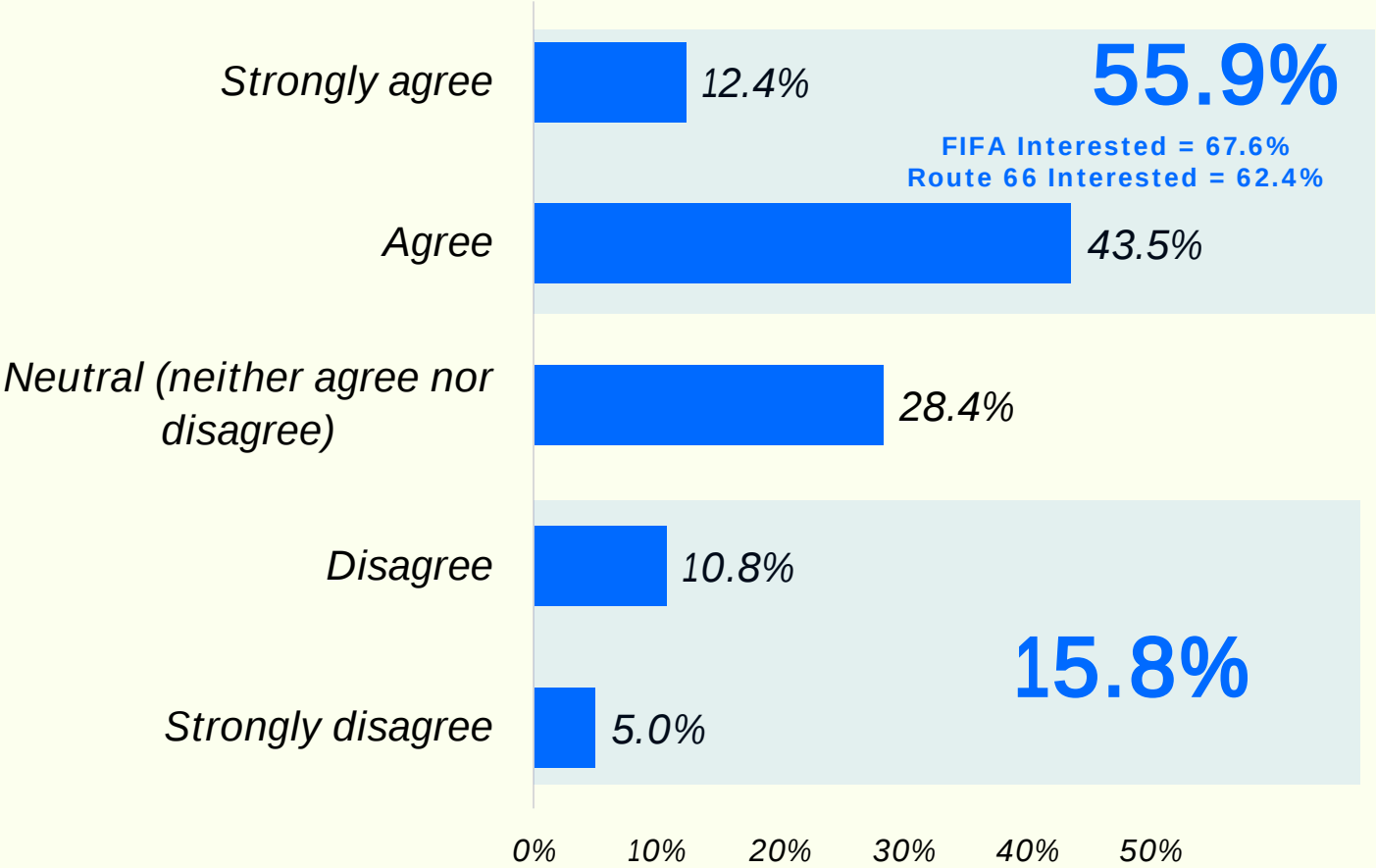
Question:
Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

Due specifically to concerns about the economy, I expect to



56% Say 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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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



Filter

Explore

Export

Search...



76 %



Edit



The State

August 2023
America 250 Likelihood☐ Likely to Travel for America 250

Recession-Proof Traveler

☒ Recession Proof Traveler☐ Non-Recession Proof Traveler

Traveler Types (Past 12 Months)

☐ Leisure Traveler☐ VFR Traveler☐ Business Traveler☐ Convention/Conference/Group Meeting Traveler

Booked Paid Lodging (Past 12 Months)

☐ Yes☐ No

Paid Lodging Types (Past 12 Months)

☐ Luxury or 5-star Hotel/Resort☐ Full-Service or 3-4 Star Hotel/Resort☐ Budget Hotel or Motel☐ Bed & Breakfast Inn☐ Vacation Home Rental☐ Time-Share Property☐ Peer-to-Peer Lodging☐ Campground or RV Park

Air Traveler (Past 12 Months)

☐ Traveled by Air

an Traveler

Travel
SentimentMarketing
MetricsHistorical
Trends

Excitement for Leisure Travel

Travel Inspiration Resources

Future Travel Expectations

Travel as a Budget Priority

Travel Planning Resources Used

Excitement for Leisure Travel

Anticipated Travel Spend

Official Tourism Office Resources Used

Travel as a Budget Priority

Present & Future Financial Sentiment

Social Media Platforms in Travel Planning

Anticipated Travel Spend

Time & Spend - Anticipated Changes

Artificial Intelligence in Travel Planning

Likelihood to Travel Internationally

Most Desired Domestic Destinations

Digital Influencers in Travel Planning

Travel Deterrents

Likelihood to Travel Internationally

Travel Agents in Travel Planning

Travel Inspiration Resources

Desired International Destinations

Travel Passions & Hobbies

Official Tourism Office Resources Used

Travel Deterrents

Streaming Services Subscribed / Watched

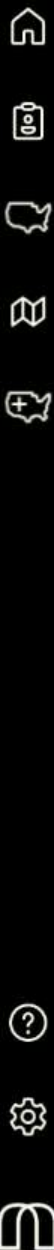
Social Media Platforms Used for Travel

Podcasts Used / Genres

News Sources Used

Magazines Read

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The Recession Proof Traveler

Compare how Recession-Proof Travelers differ from your selected audience to reveal key differences in intent, behavior, and value.

Recession-Proof Traveler: Top 2 Box Agreement – “Even in an economic recession, travel is a worthwhile investment.”

Year

2025 YTD

Curated Collections

Total

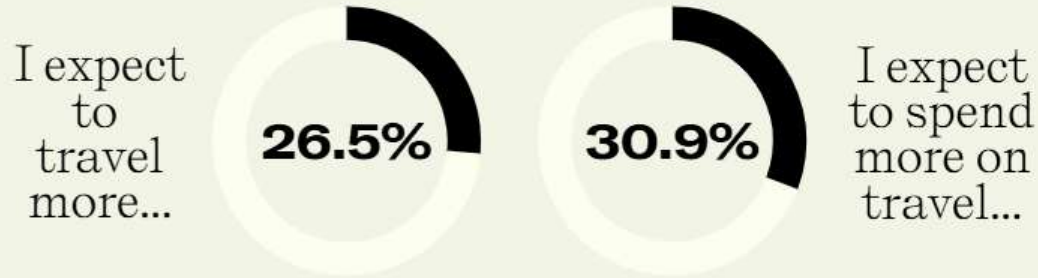
Filters

American Travelers

Total

Total

American Travelers



Average Planning Window
10.8 weeks



Anticipated Travel Spend
\$5,388



Trips Planned (Next 12 Months)
3.7 trips

Average Age

49.6

Average Household Income

\$112,734

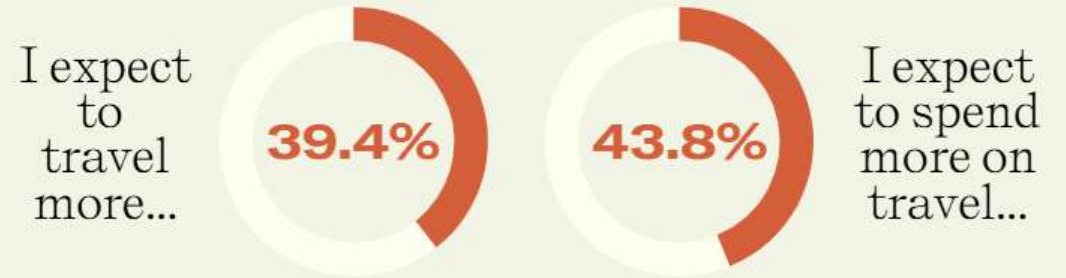
Children in Household

29.7%

Top Origin States



Recession Proof American Travelers



Average Planning Window
11.4 weeks



Anticipated Travel Spend
\$8,388



Trips Planned (Next 12 Months)
5.3 trips

Average Age

50.6

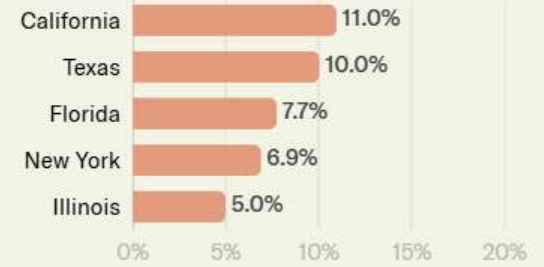
Average Household Income

\$142,864

Children in Household

33.1%

Top Origin States



Marketing Metrics

2025 YTD American Travelers

Year

2025 YTD

Curated Collections

Total

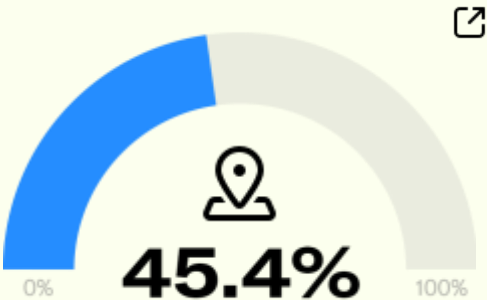
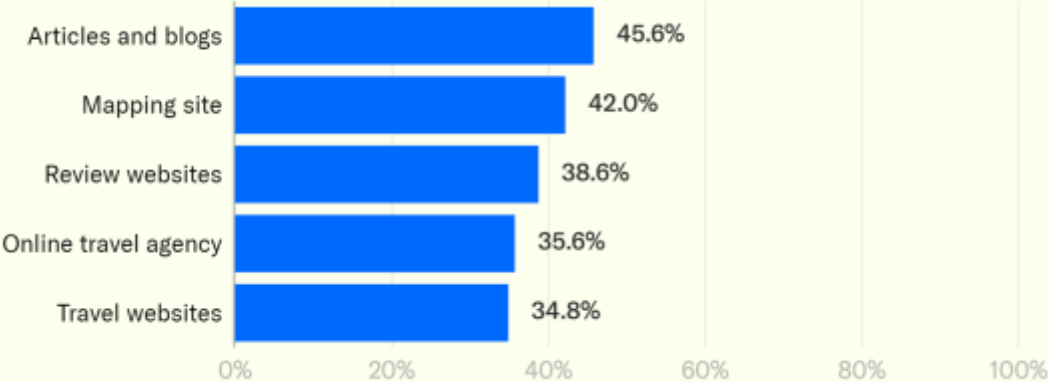
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American Travelers

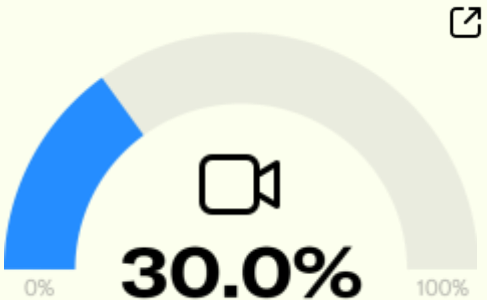
Total

Total

Top Travel Planning Resources
(Used in the Past 12 Months)

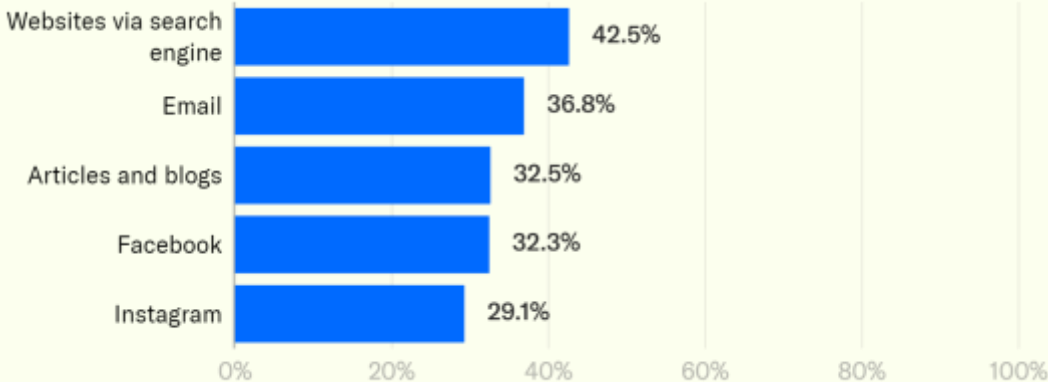


Used Official Tourism Office
Resources to Plan Travel
(Past 12 Months)

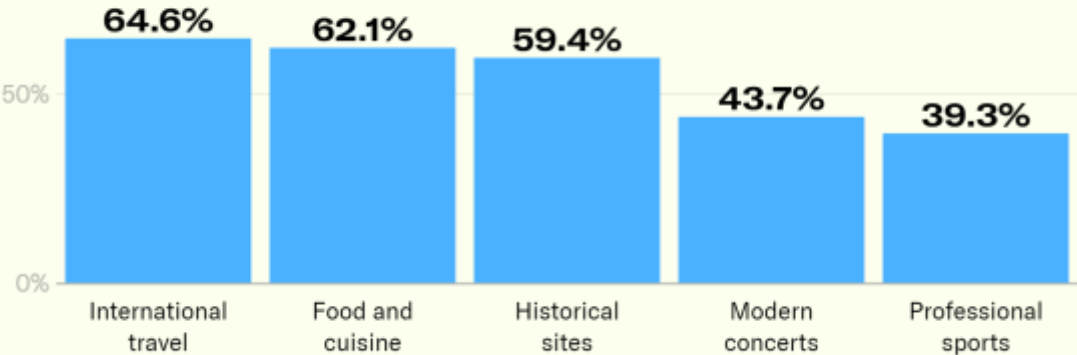


Watched Videos Online
to Plan Travel
(Past 12 Months)

Most Effective Travel Planning Resources



Top Travel Hobbies & Passions
(Top 2 Box - % selecting "Extremely high interest" or "High interest")



FIFA World Cup 2026



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FIFA World Cup 2026

Dates: June – July, 2026.

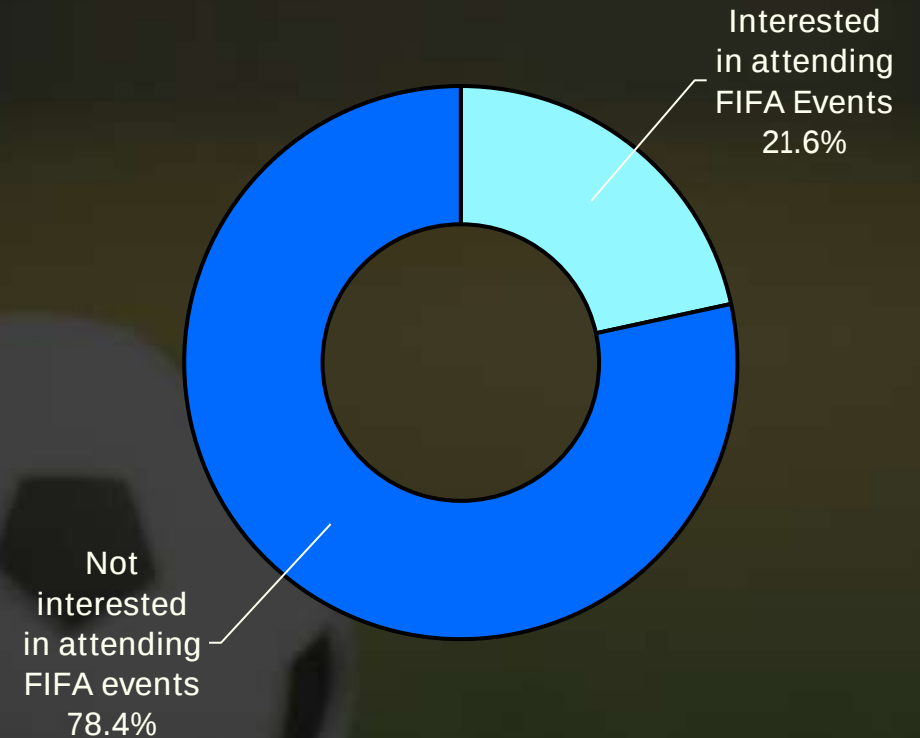
Teams: 48 national teams.

Venues: 16 host cities across the three nations.

Canada: Toronto, Vancouver

Mexico: Guadalajara, Mexico City, Monterrey

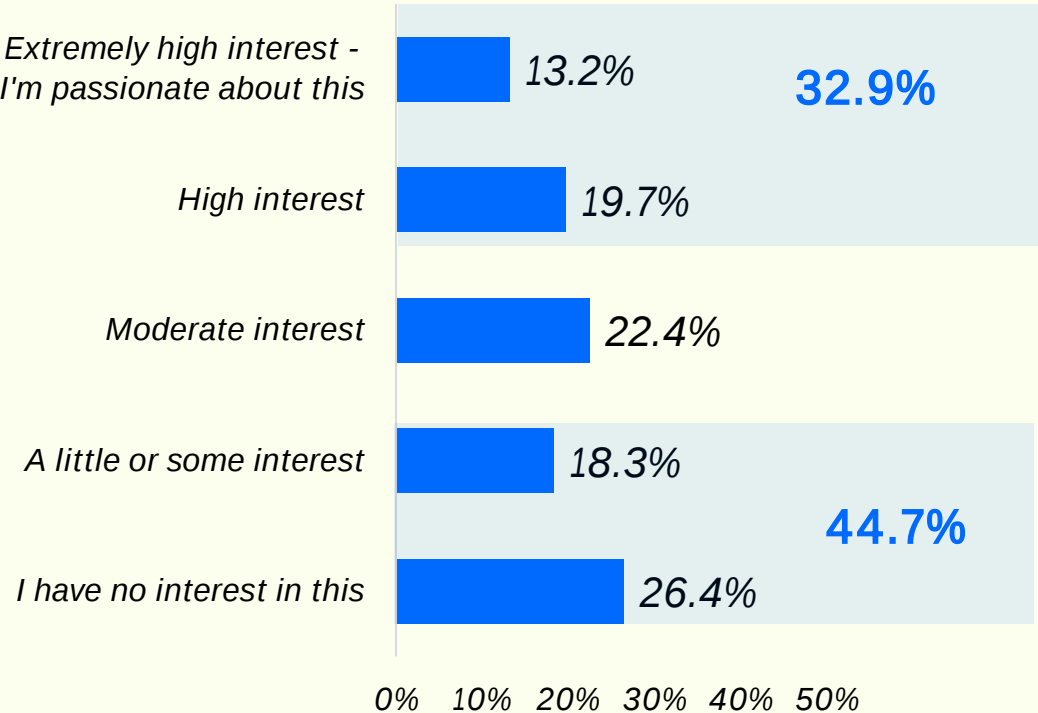
United States: Atlanta, Boston, Dallas, Houston, Kansas City, Los Angeles, Miami, New York/New Jersey, Philadelphia, SF Bay Area, Seattle, and other major cities.



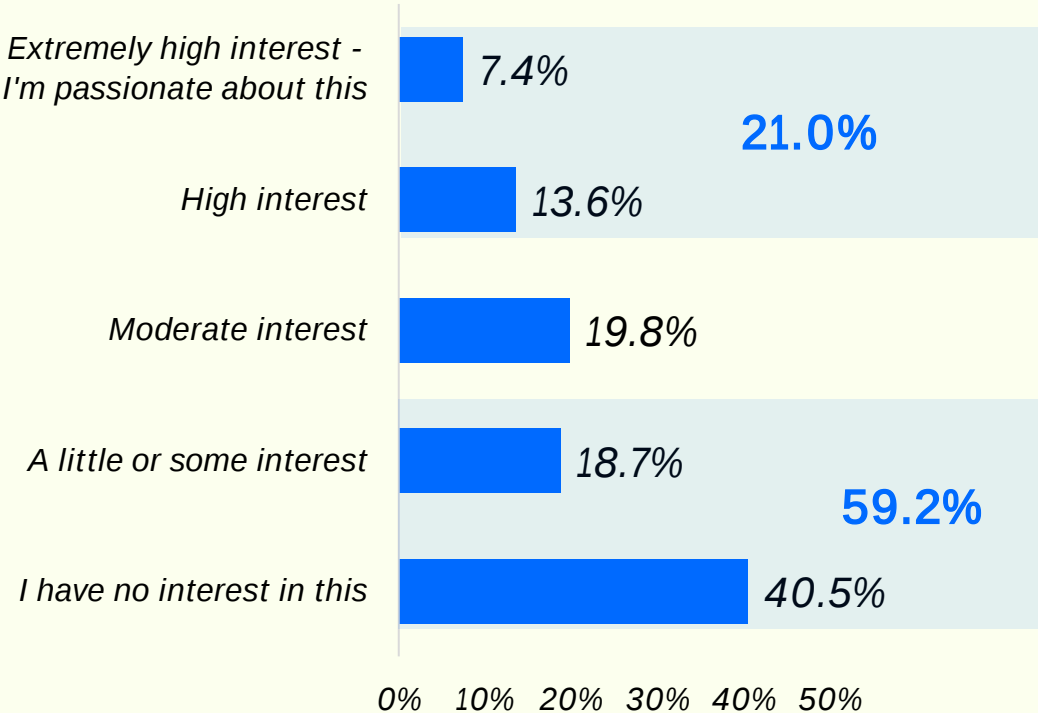
Background: Many American Travelers Love Sports

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

Professional Sports (Large Venue)

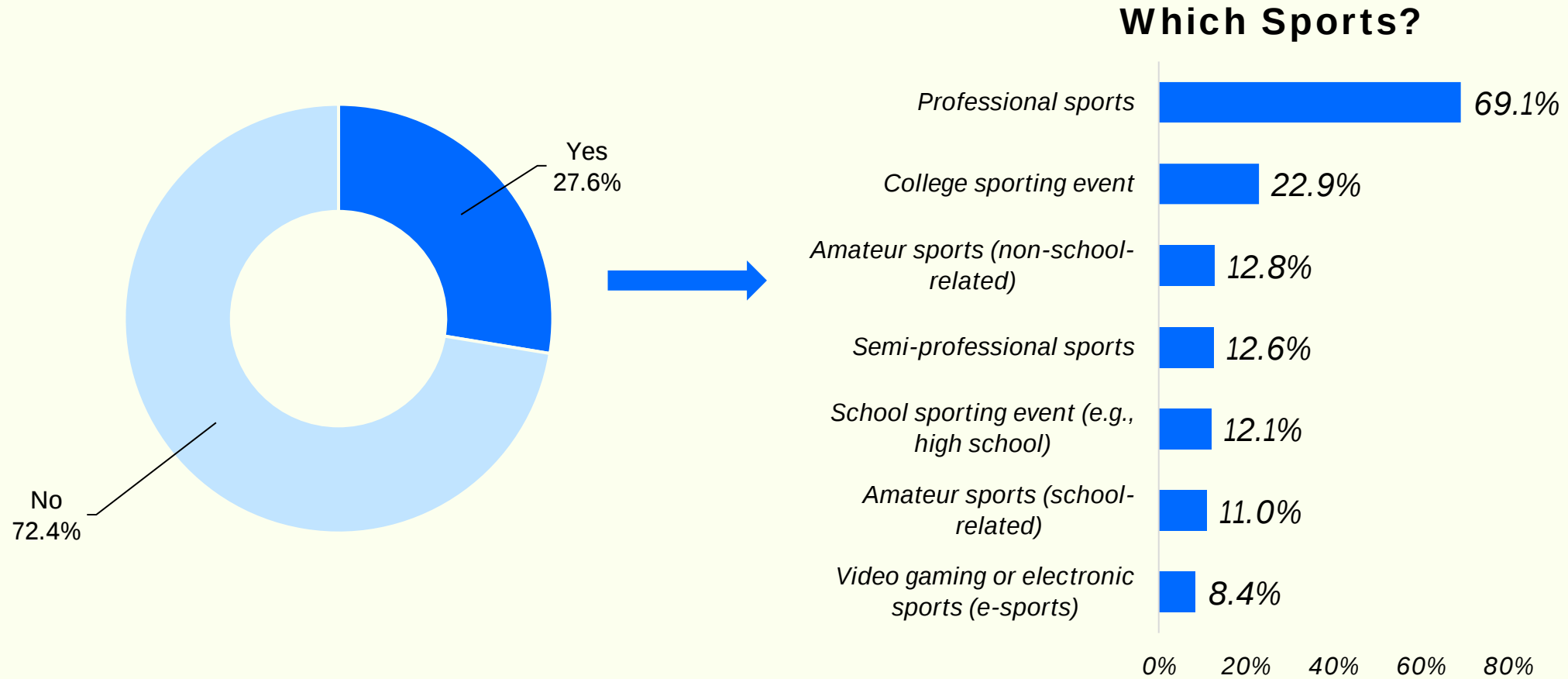


College Sports



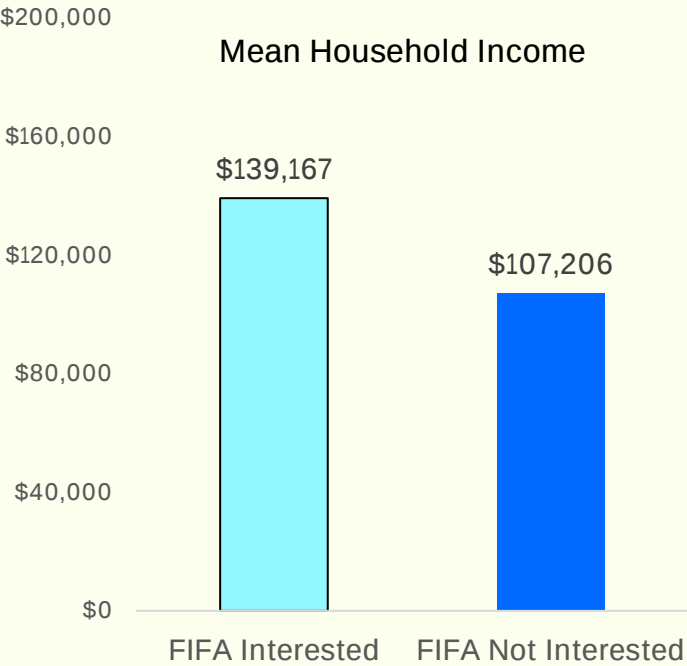
Background: Many Americans Also Travel for Sports

Question: *In the PAST 12 MONTHS, have you traveled specifically to attend a sporting event? (Please include travel to professional, semi-professional, amateur or school-related sporting events)*

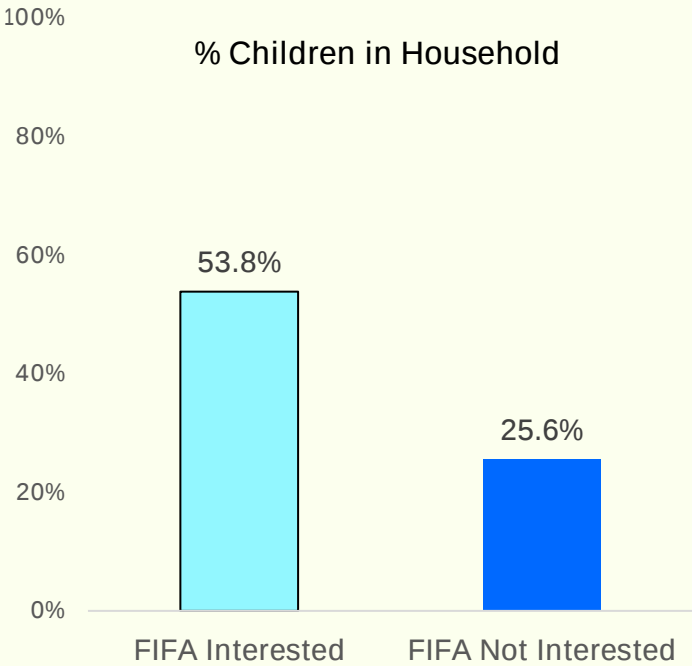


FIFA Interested Travelers are Affluent, Diverse Family Travelers.

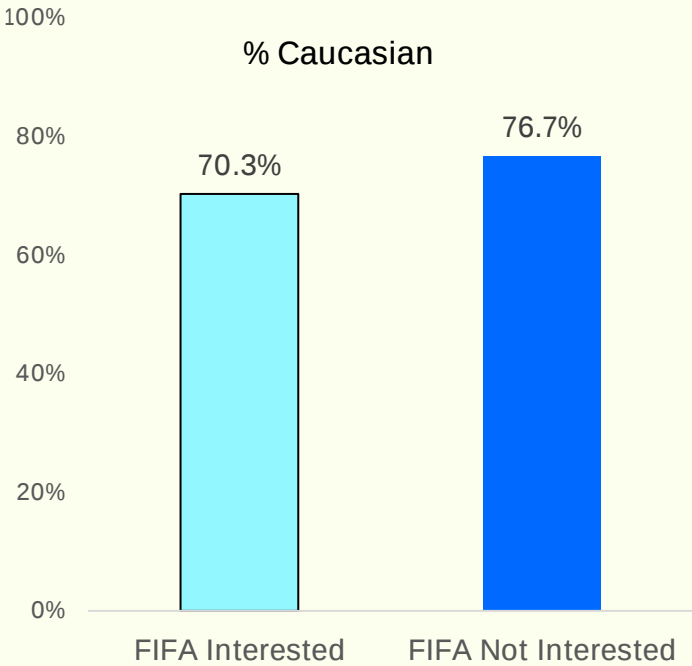
Question: Which best describes the combined annual income of all members of your household?



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

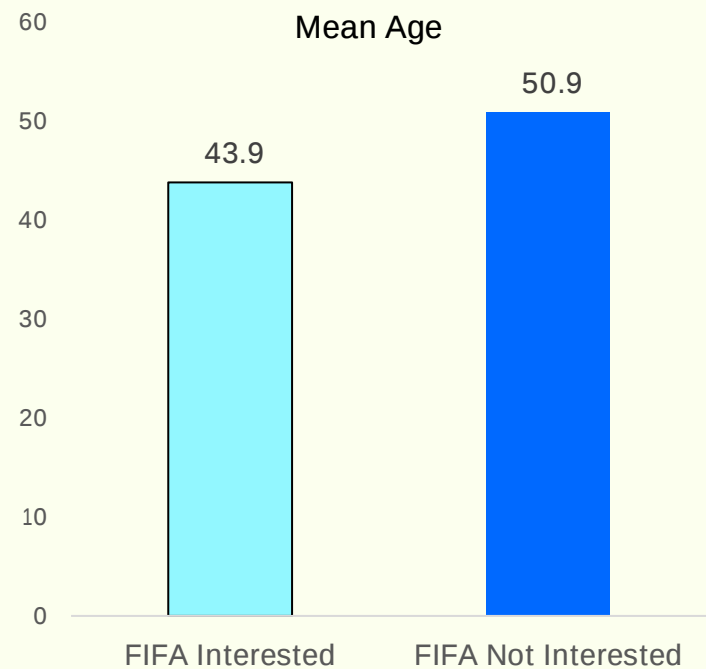


Question: Which best describes your ethnicity?

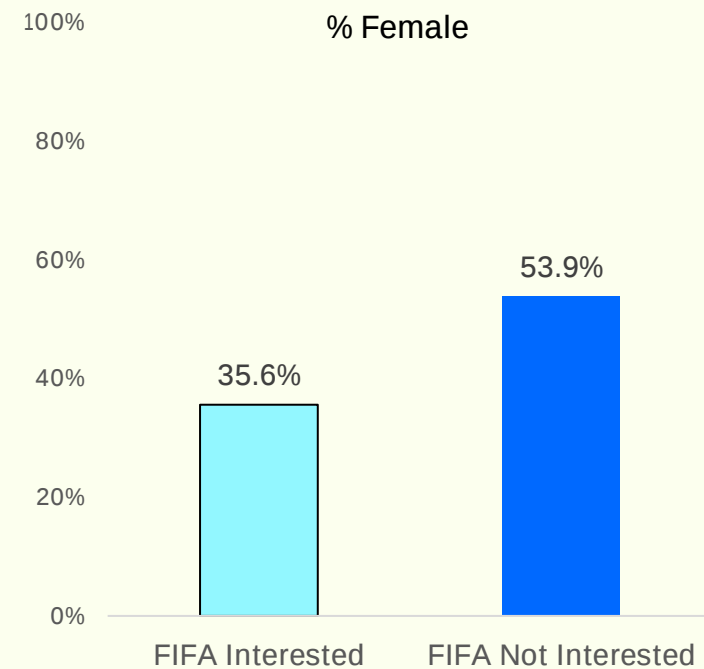


FIFA interested travelers skew younger and male.

Question: *In what year were you born?*

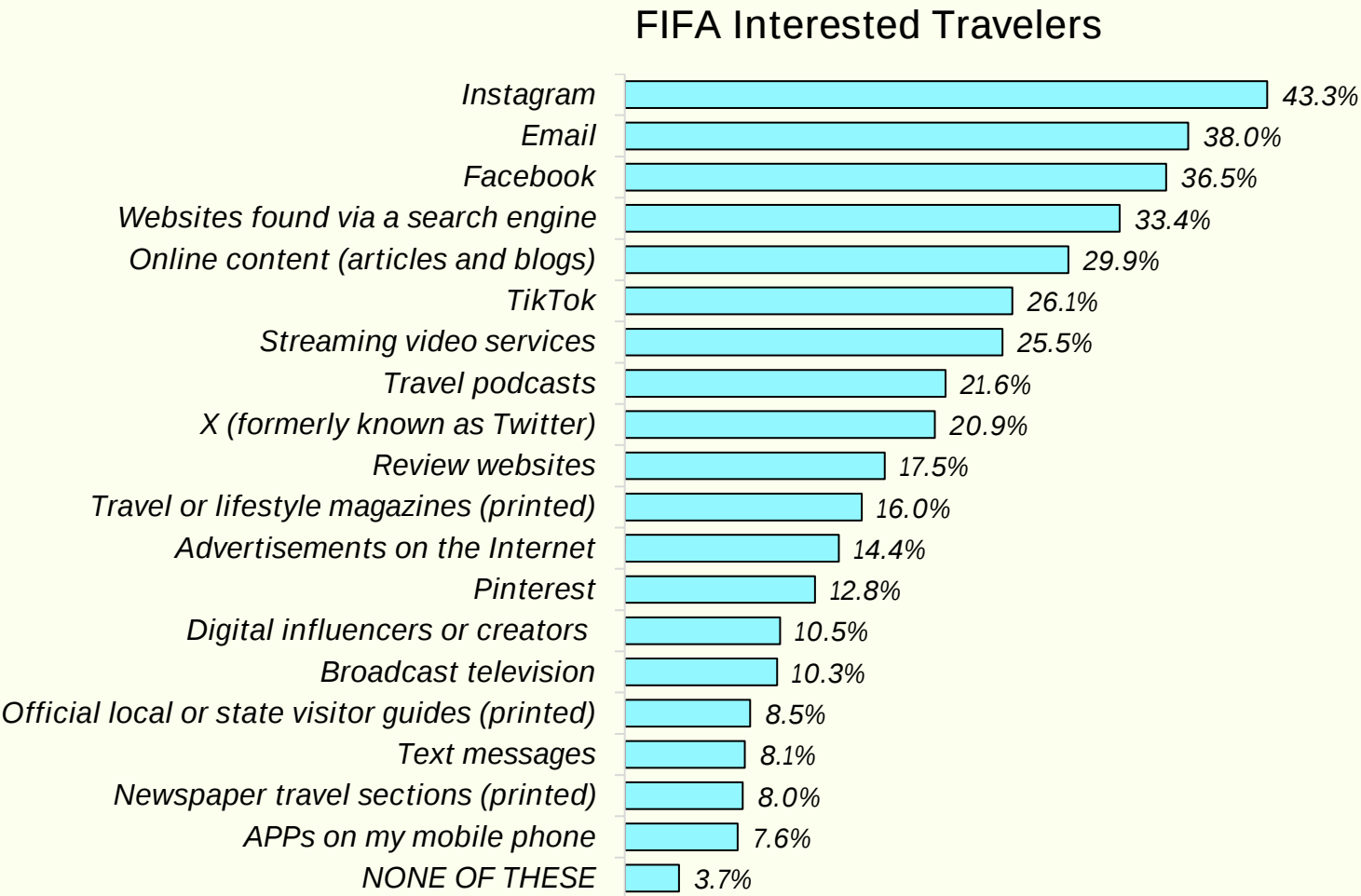


Question: *What is your gender?*



Promoting FIFA-related travel through social media channels—a winning strategy.

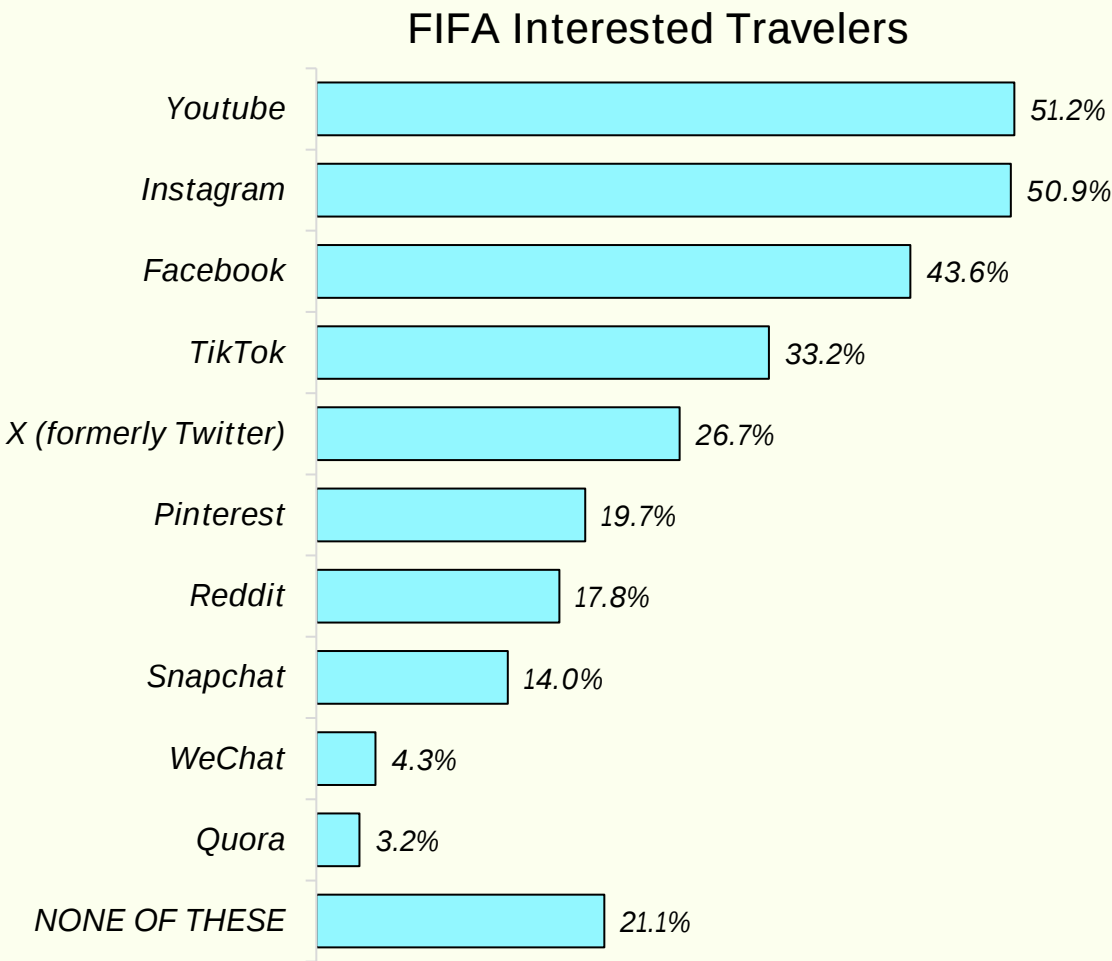
Question:
Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?



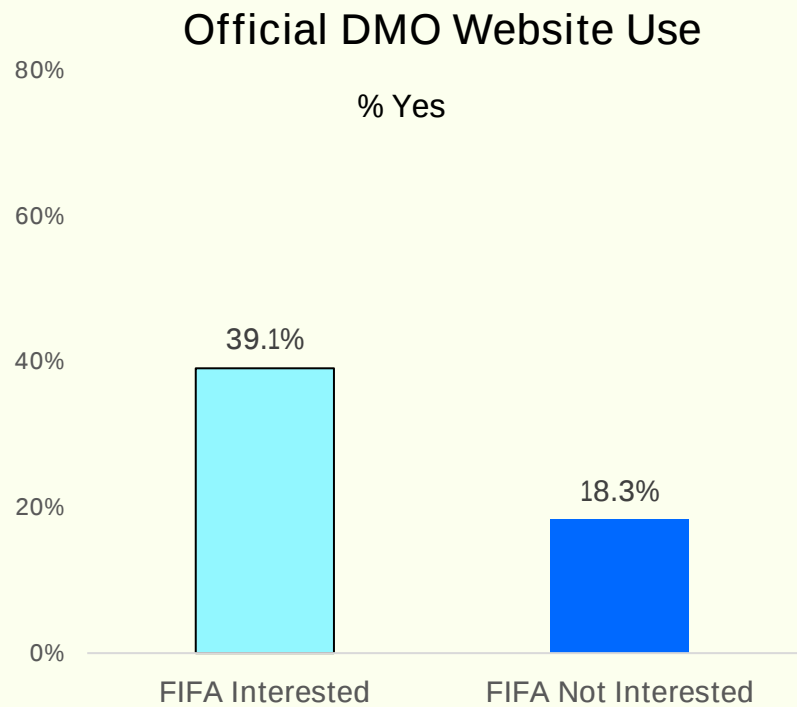
YouTube, Instagram, Facebook and TikTok all show great potential for this segment.

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)

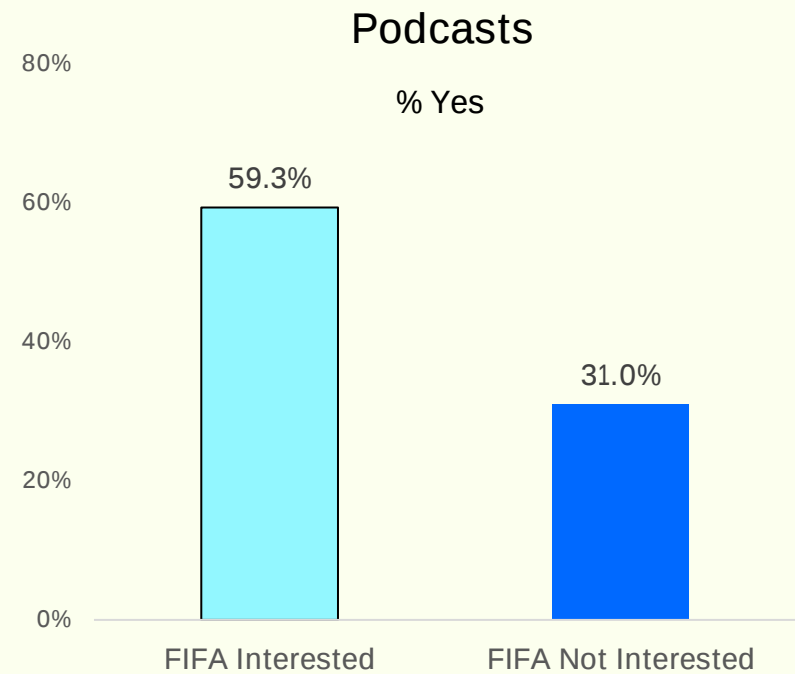
Please only check if used for travel planning, ideas or inspiration]



Don't forget DMO websites and Podcasts



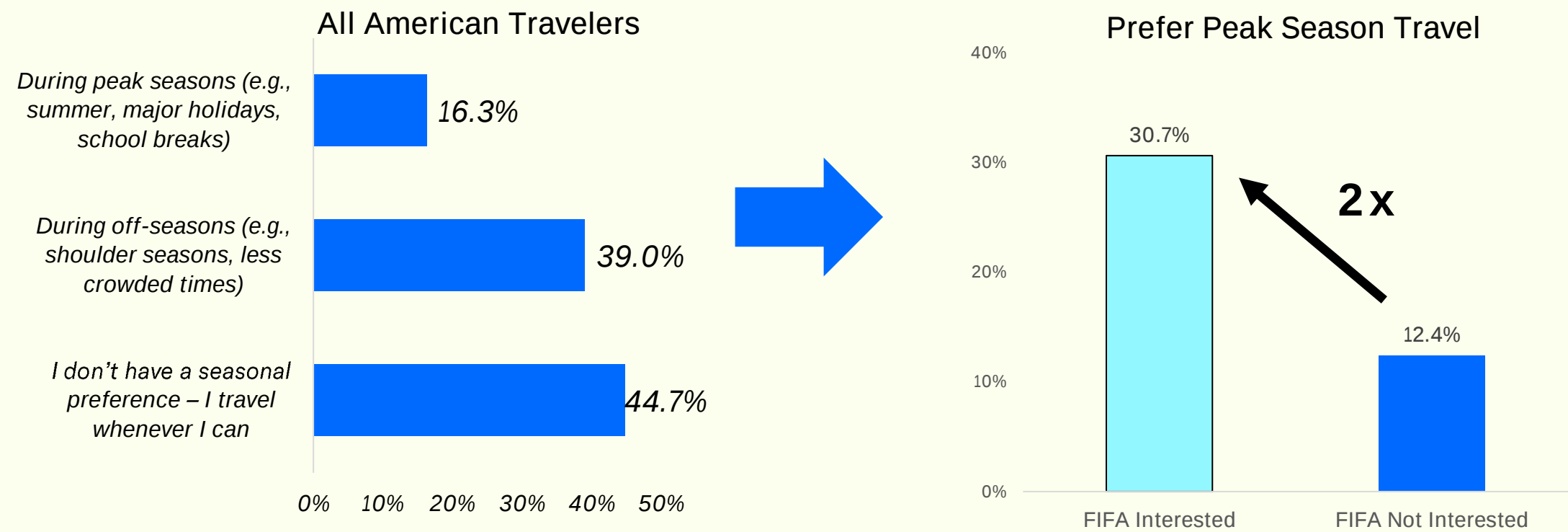
Question: *In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel?*



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

FIFA interested travelers are twice as likely as others to prefer peak season travel. Remember, they're twice as likely to travel with kids.

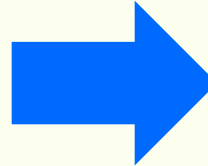
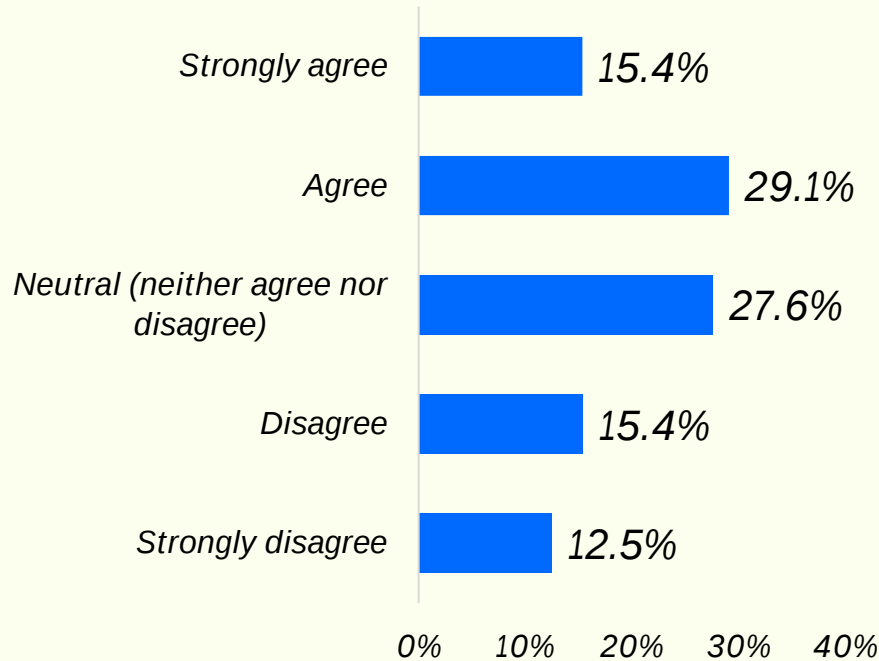
Question: *When do you typically prefer to travel for leisure?*



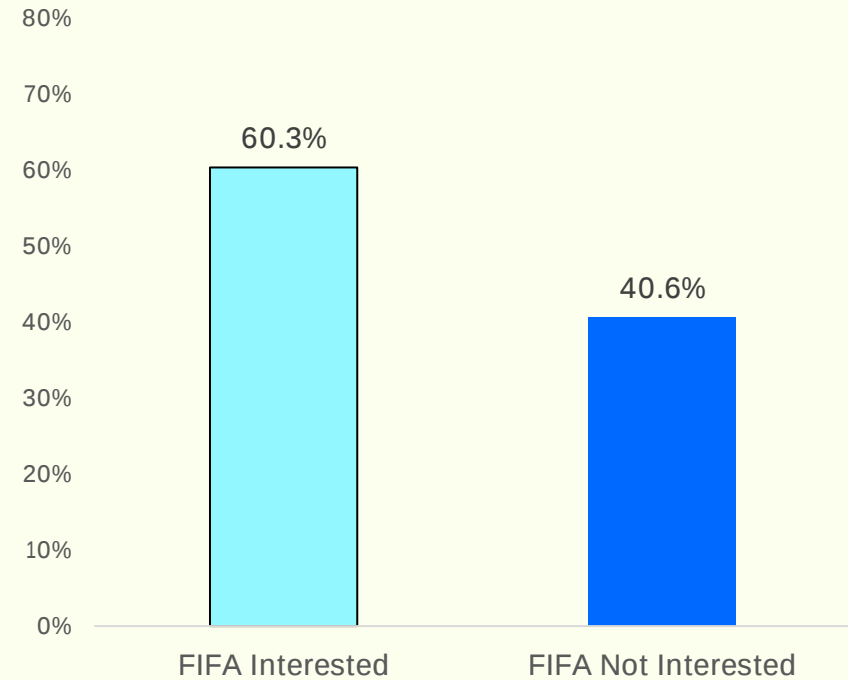
Consider multi-generational travel as a hook.

Question: *I am interested in taking MULTI-GENERATIONAL TRIPS (i.e., travel with at least 3 generations of your family.)*

All American Travelers



Interest in Multi-Gen Trips



Key Insights: FIFA-Interested Travelers



Sports Travel Is Already Big: Over 1-in-4 Americans have traveled in the past year specifically to attend a sporting event, showing strong baseline demand that the World Cup will amplify. Currently, 21.6% are interested in traveling to see upcoming World Cup events.



Affluent, Family-Oriented Audience: FIFA-interested travelers are wealthier, more diverse, and often traveling with school-aged children—making them a high-value segment.



Young and Male Skew: This segment trends younger and male compared to the general traveling public, a profile that can help shape targeted campaigns.



Digital Channels Drive Influence: Social media platforms (YouTube, Instagram, Facebook, TikTok) are particularly influential for this group, with podcasts and official DMO websites also playing a strong role in trip planning.



Peak Season, Multi-Generational Travelers: FIFA fans are twice as likely to prefer peak-season travel and more open to multi-generational trips, offering the industry chances to package family-friendly experiences.



Route 66 100th Anniversary

Date: The centennial milestone is on November 11, 2026.

Official Kick-Off: Springfield, Missouri on April 30, 2026.

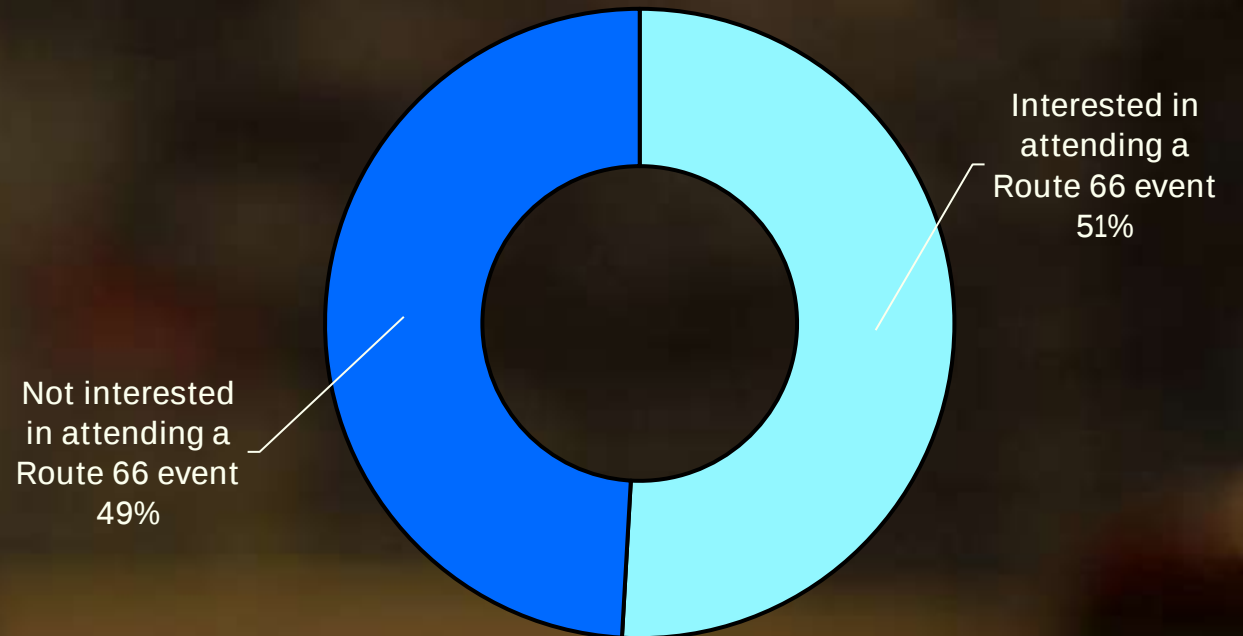
National Commission: The U.S. Route 66 Centennial Commission is coordinating events, studying the road's history, and promoting tourism.

Future Partners



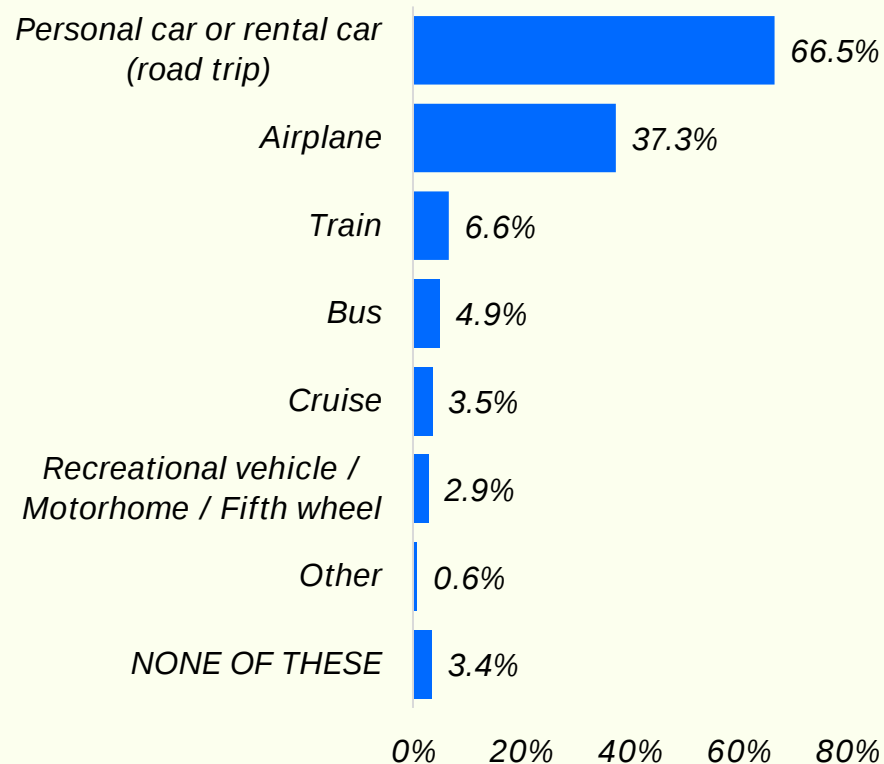
Question: Route 66 is celebrating its centennial anniversary in 2026, marking 100 years since its establishment. Each of the eight states along Route 66 is planning its own celebratory events and activities, including car shows, festivals, and cultural experiences.

How interested would you be in traveling to enjoy these opportunities?

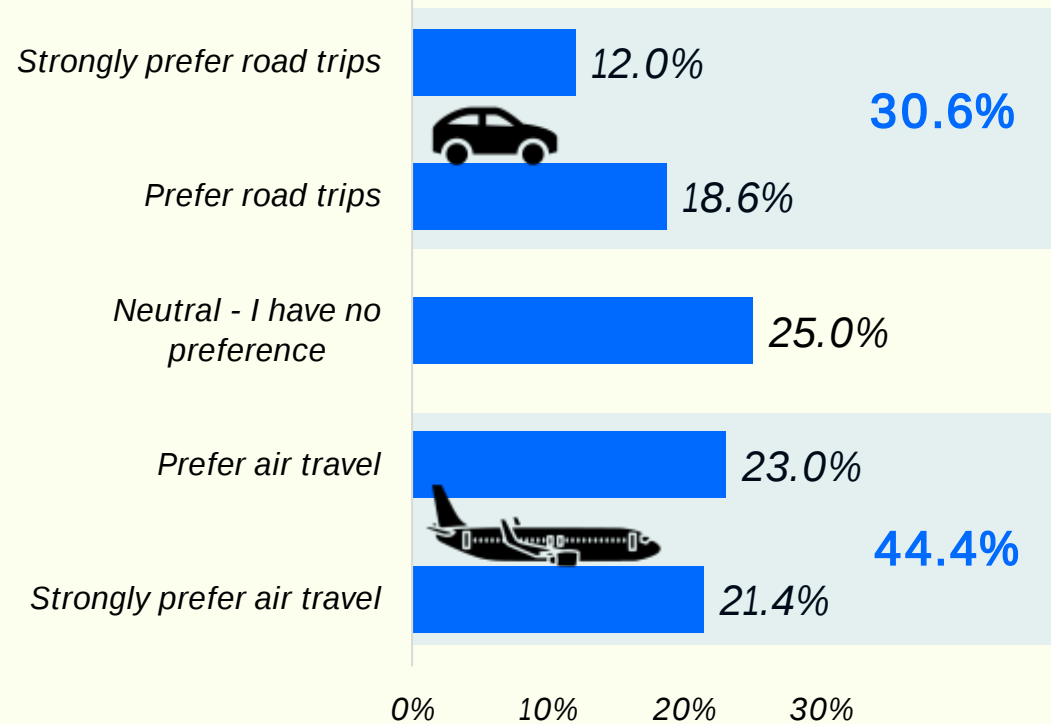


Background: Car is still King in American travel, but a lot of us prefer to fly.

Question: How did you travel to (or between) destinations on your most recent trip? (Select all that apply)

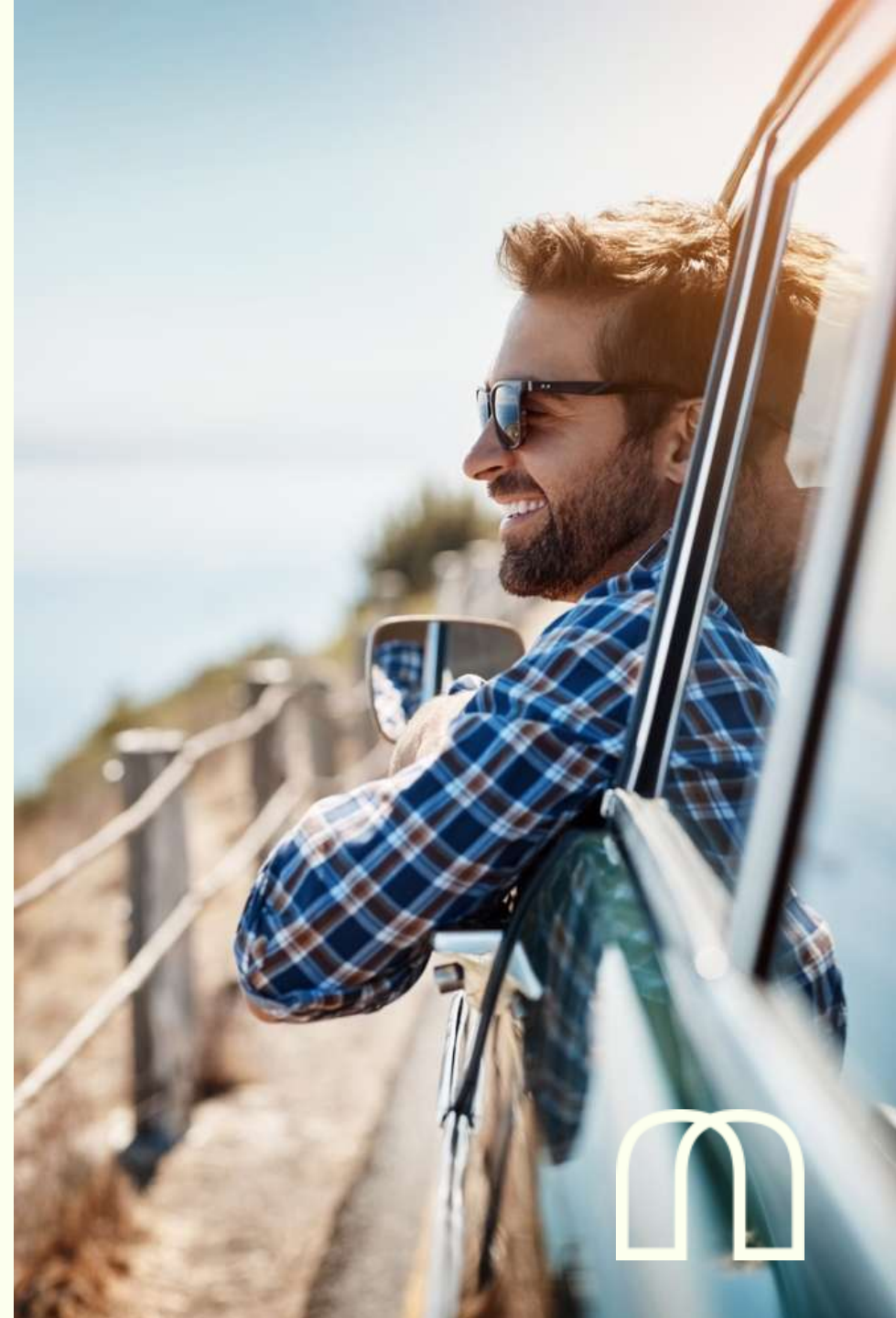
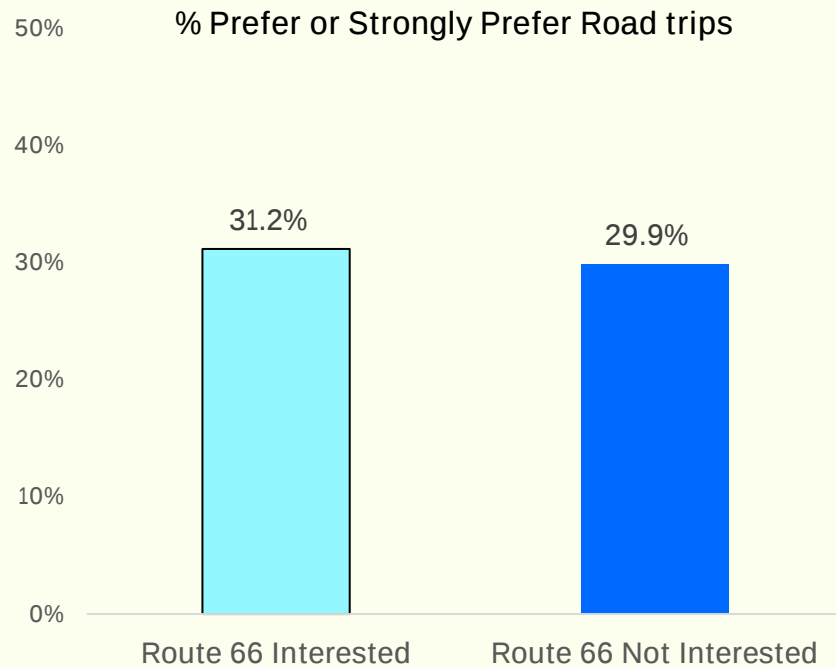


Question: Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)? (Select one that best completes the sentence) When it comes to road trips vs. air travel, I _____.



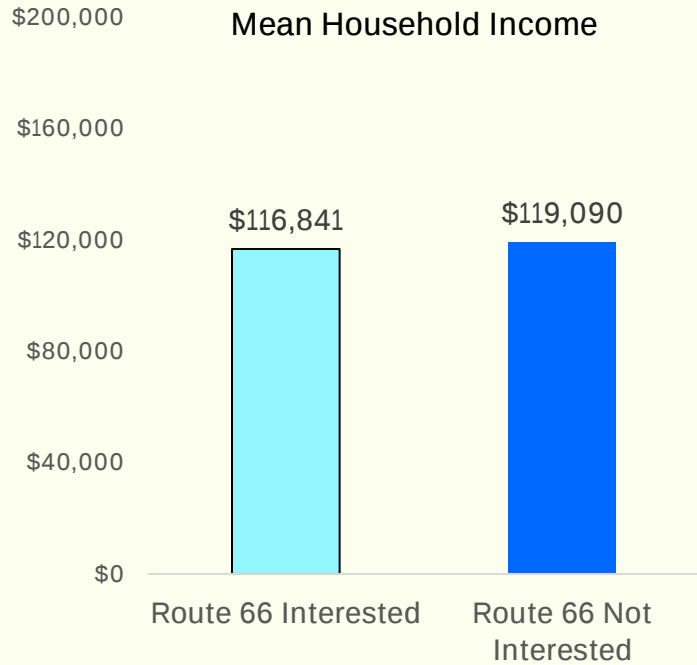
Route 66 interested travelers are not necessarily road trip enthusiasts.

Question: *Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)? (Select one that best completes the sentence)*

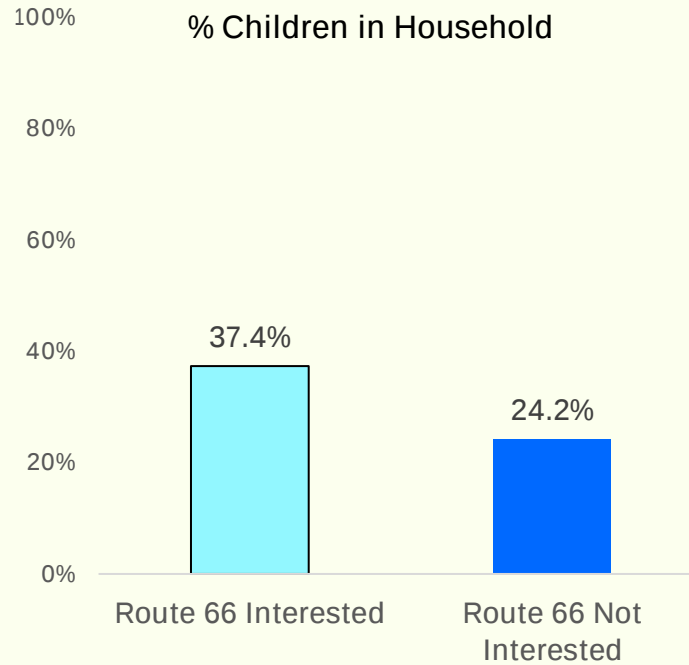


Demographically, Route 66 interested travelers are closer to the national norm across demographics.

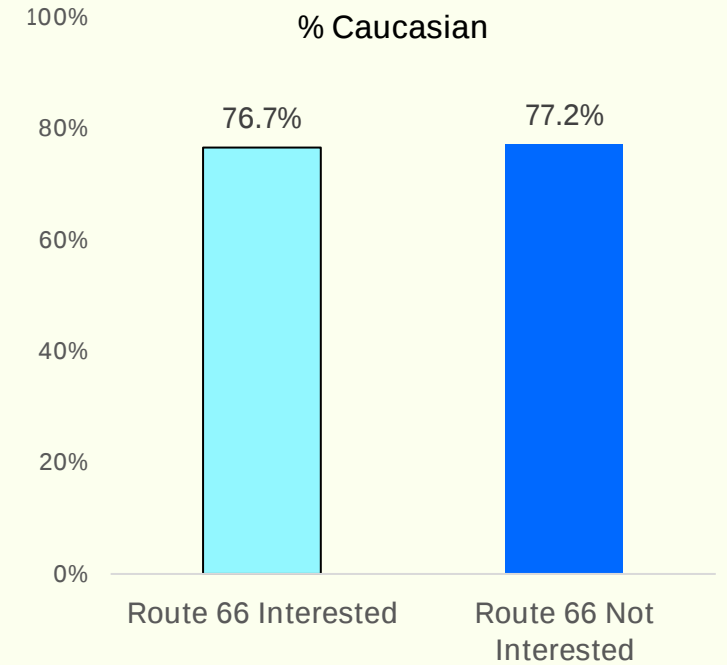
Question: Which best describes the combined annual income of all members of your household?



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

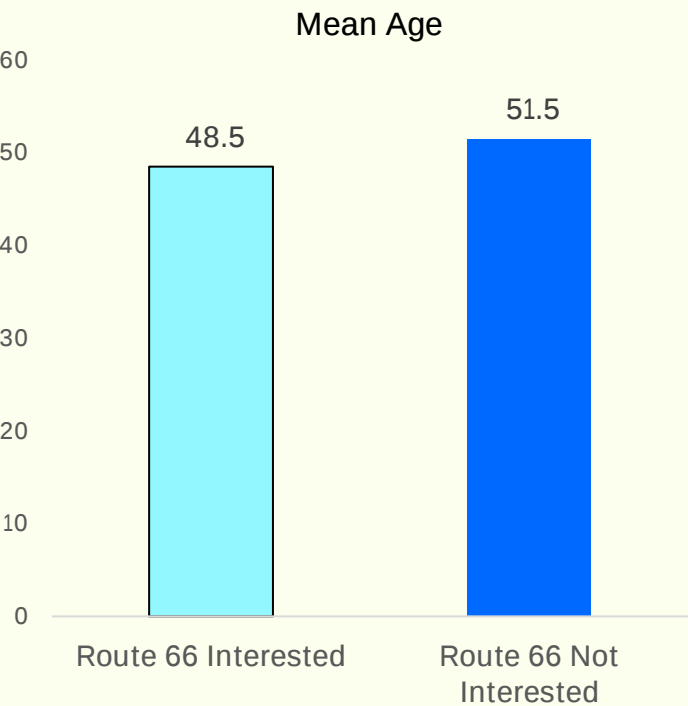


Question: Which best describes your ethnicity?

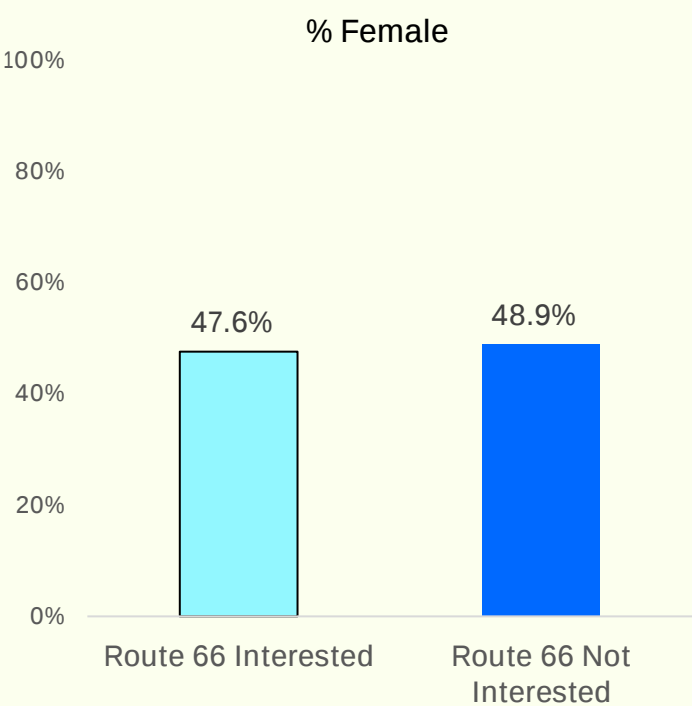


Route 66 interested travelers are very much the norm in terms of age and gender.

Question: *In what year were you born?*



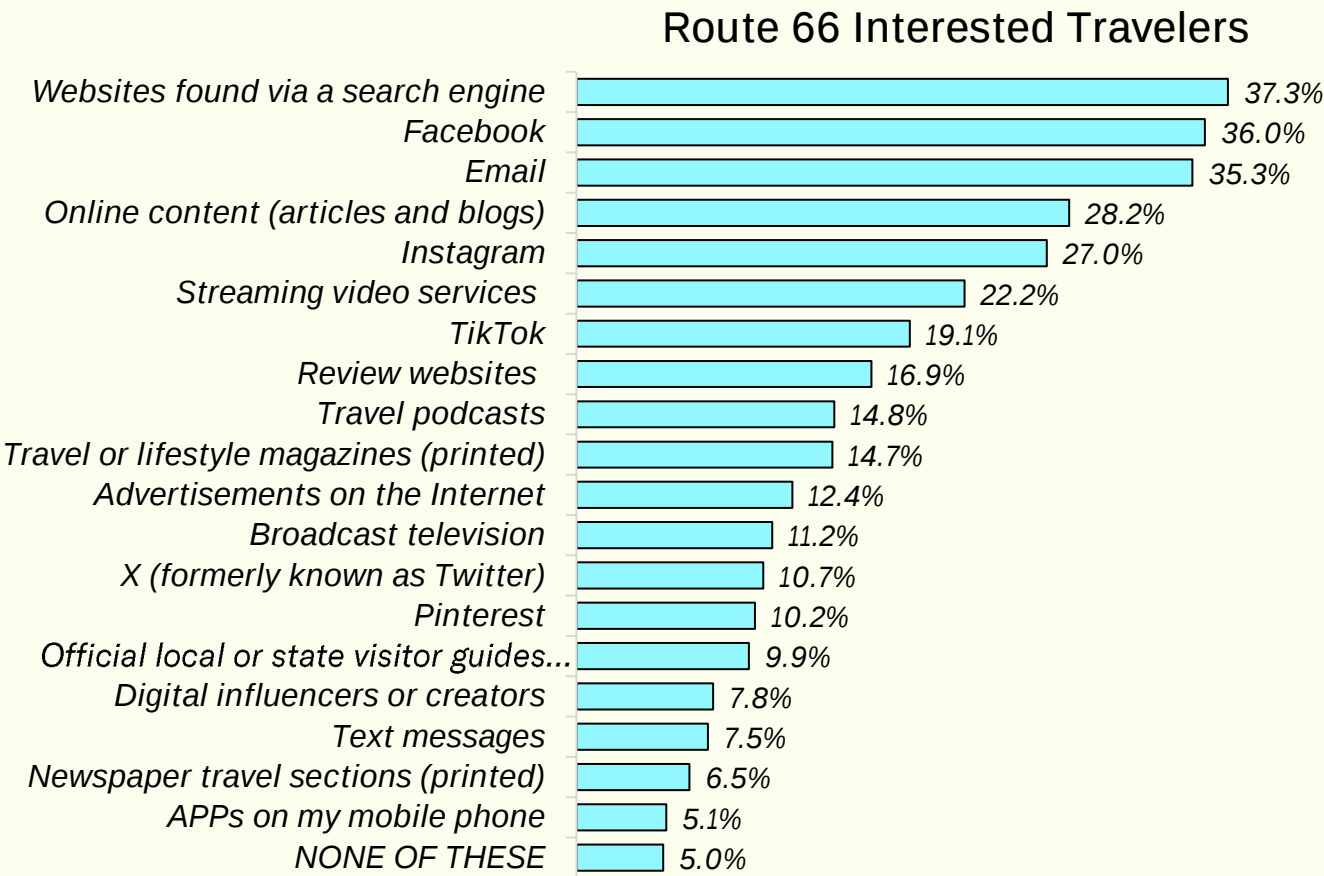
Question: *What is your gender?*



Route 66 interested travelers show a more “traditional” pattern of travel planning resource consumption.

Question:

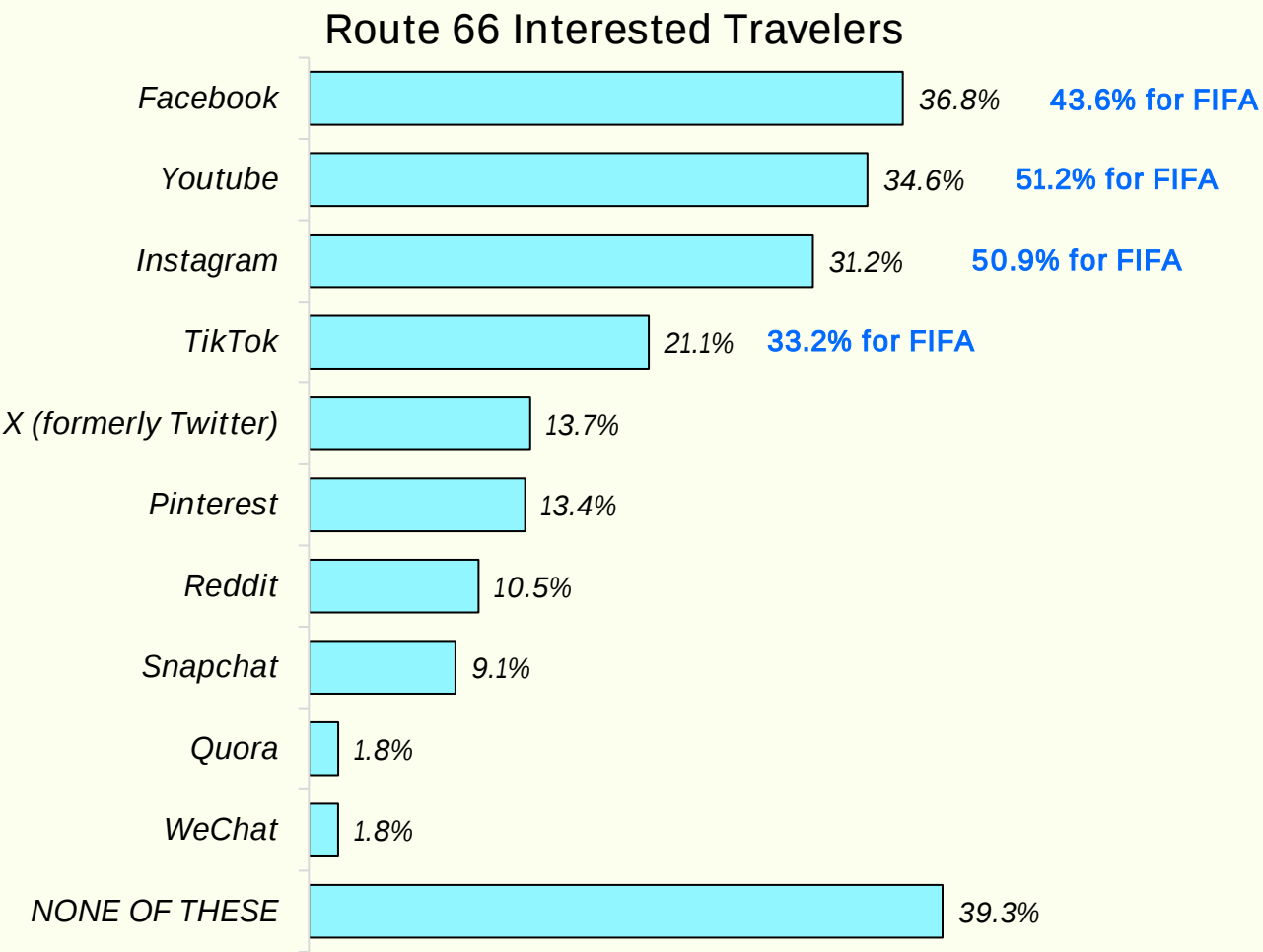
Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?



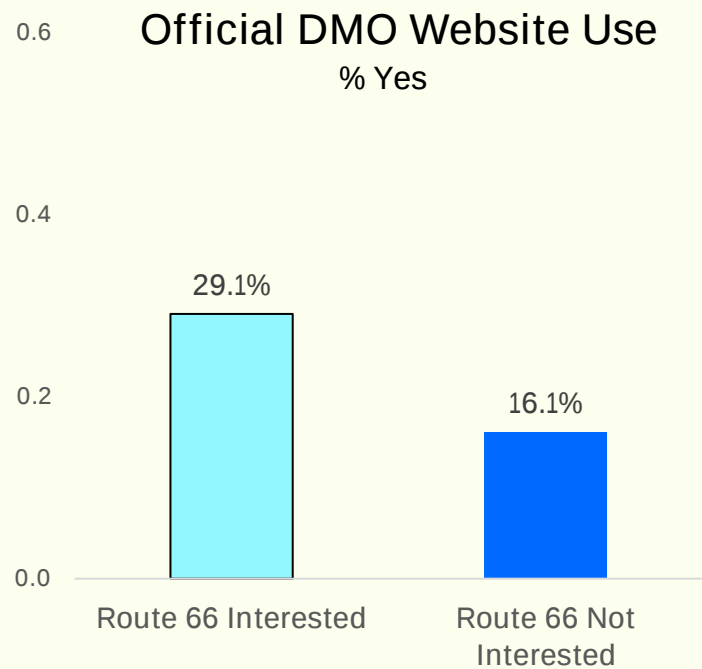
Social channels are lesser used by Route 66 interested travelers (relative to the FIFA crowd)

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)

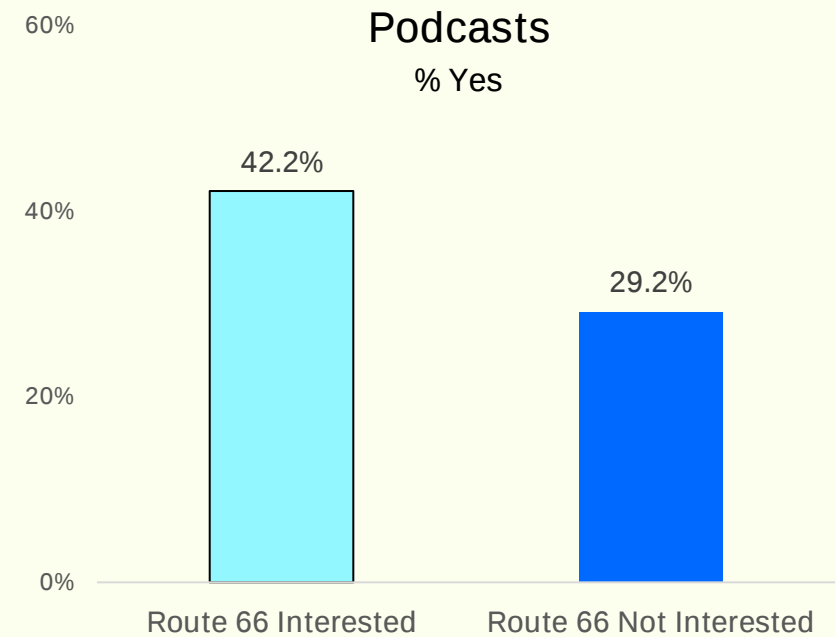
Please only check if used for travel planning, ideas or inspiration]



Podcasts and DMO websites show promise here, too!



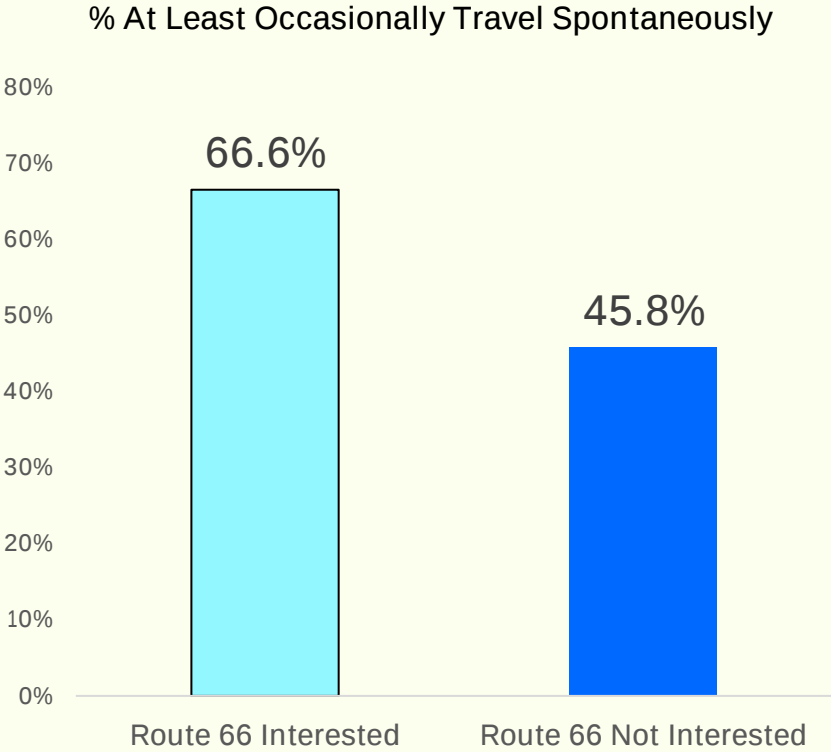
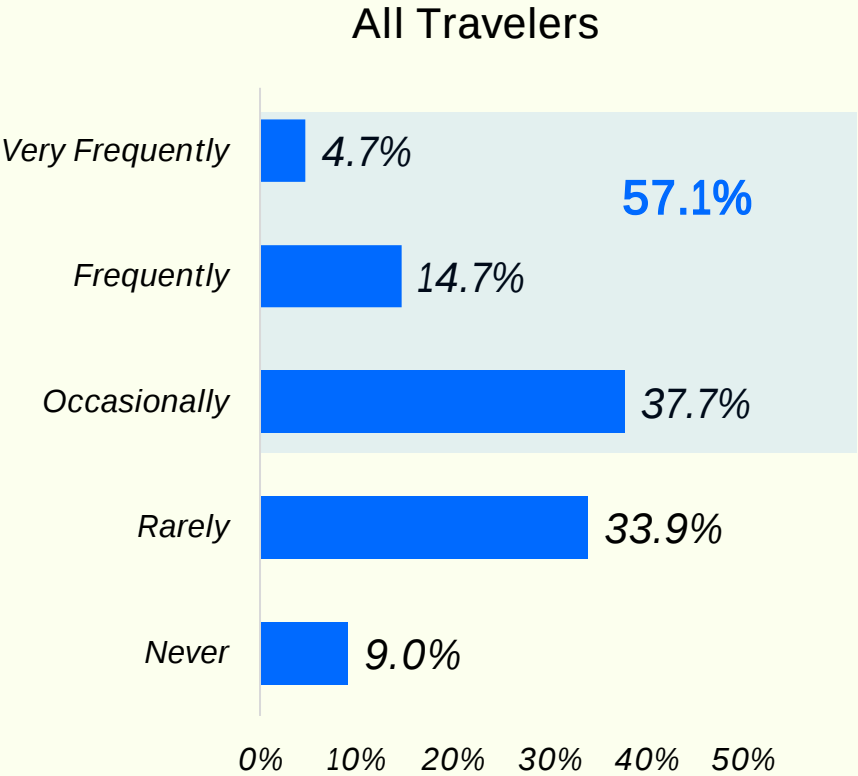
Question: *In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel?*



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

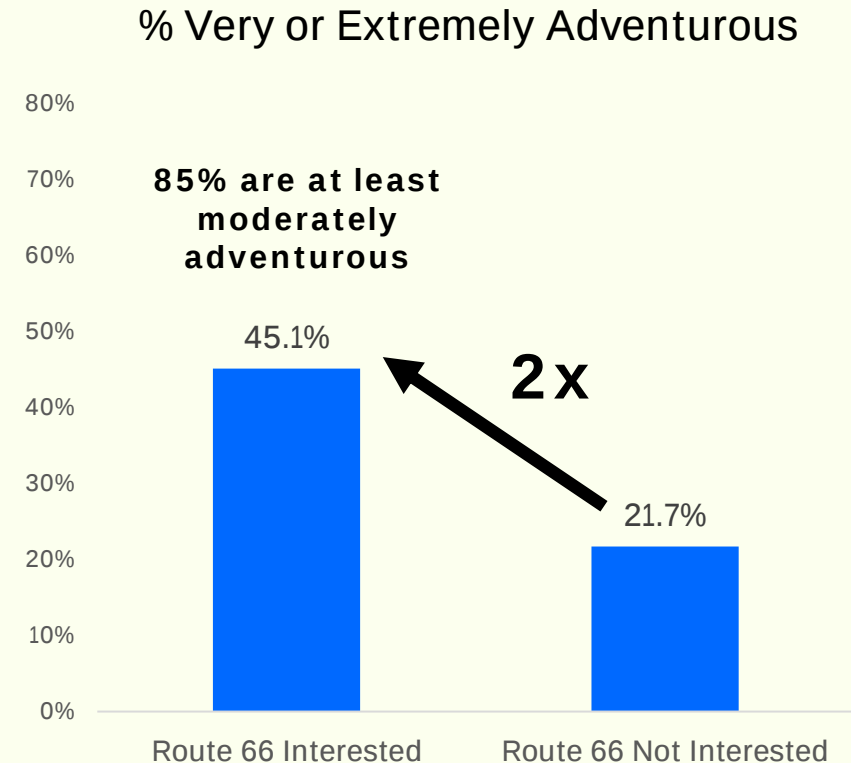
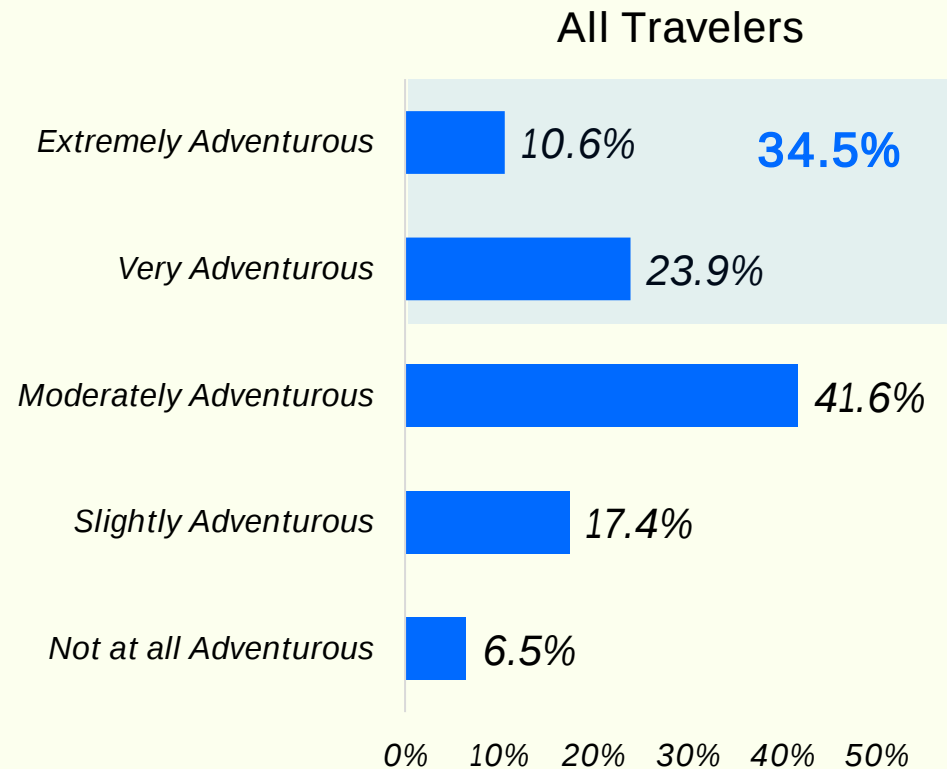
Spontaneous Fun Ranks High on Their Lists.

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



Consider Adventure as a Travel Hook.

Question: *How adventurous do you consider yourself to be while traveling?*



Key Insights: Route 66-Interested



The Route 66 Centennial is a Major Draw: With official celebrations launching in April 2026 and spanning all eight Route 66 states, car shows, festivals, and cultural events offer strong opportunities to package themed travel.



Not Typical Road-Trippers: Despite Route 66's reputation, travelers interested in the centennial are not particularly oriented to be road trip enthusiasts.



Demographically Mainstream: Route 66 travelers closely mirror the national norm in terms of age, gender, income, and family status—making this segment broadly relatable and accessible.



Traditional Planning Habits: Compared to the FIFA segment, Route 66 travelers rely less on social media for trip planning and more on traditional sources such as DMO websites and even podcasts.



Spontaneous and Adventurous: This audience ranks high on spontaneity and self-identified adventurousness, providing opportunities to market spur-of-the-moment experiences and off-the-beaten-path attractions.

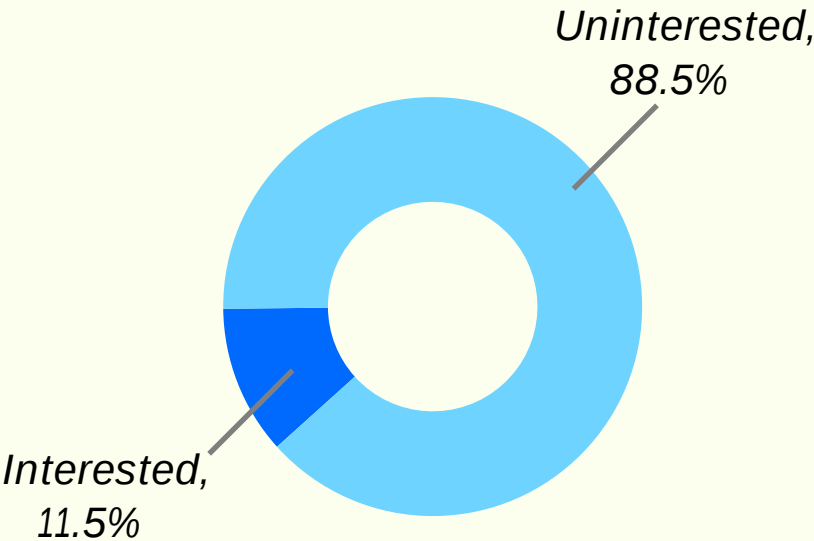


Future Partners

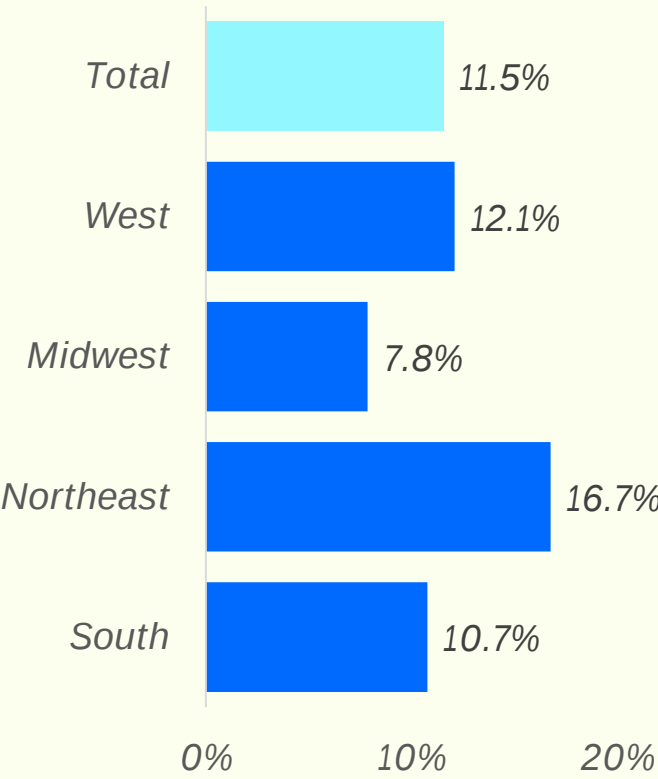
**Check in on
America 250 Traveler**

America 250 remains strongest in the Northeast and amongst GenX—GenZ less connected

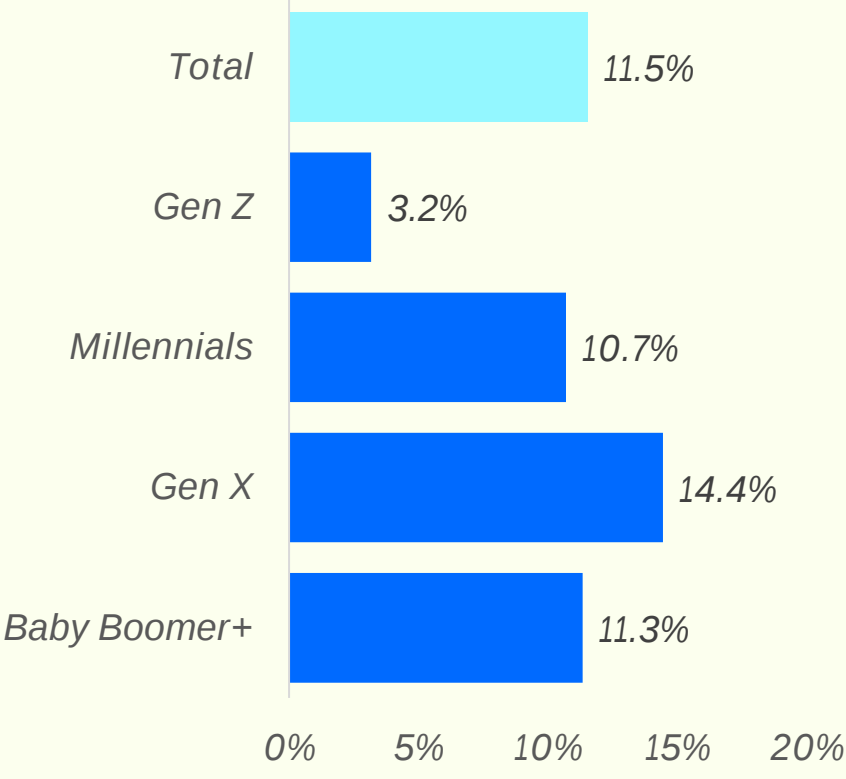
Interest in America 250



Interest by Region

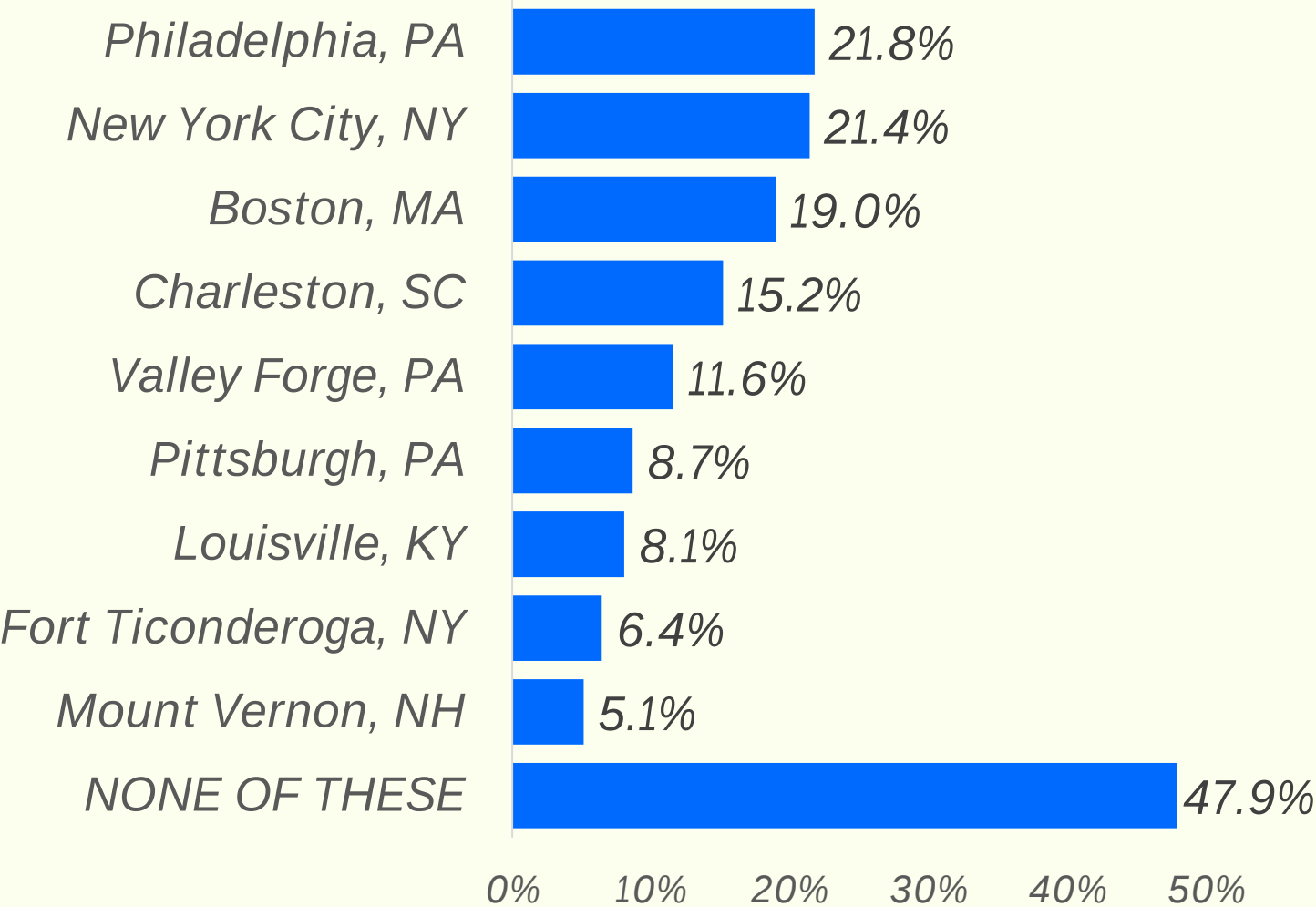


Interest by Generation



Areas of Interest for America 250

Question:
Which of the following destinations are you interested in traveling to attend an America 250 event?





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