

A tropical resort scene at sunset. In the foreground, two people are relaxing on lounge chairs by an infinity pool. The pool's edge is visible, and the water reflects the warm colors of the sunset. In the background, a sandy beach is lined with several palm trees and closed beach umbrellas. The ocean stretches to the horizon under a sky with soft, colorful clouds. The overall atmosphere is peaceful and luxurious.

# Future Partners

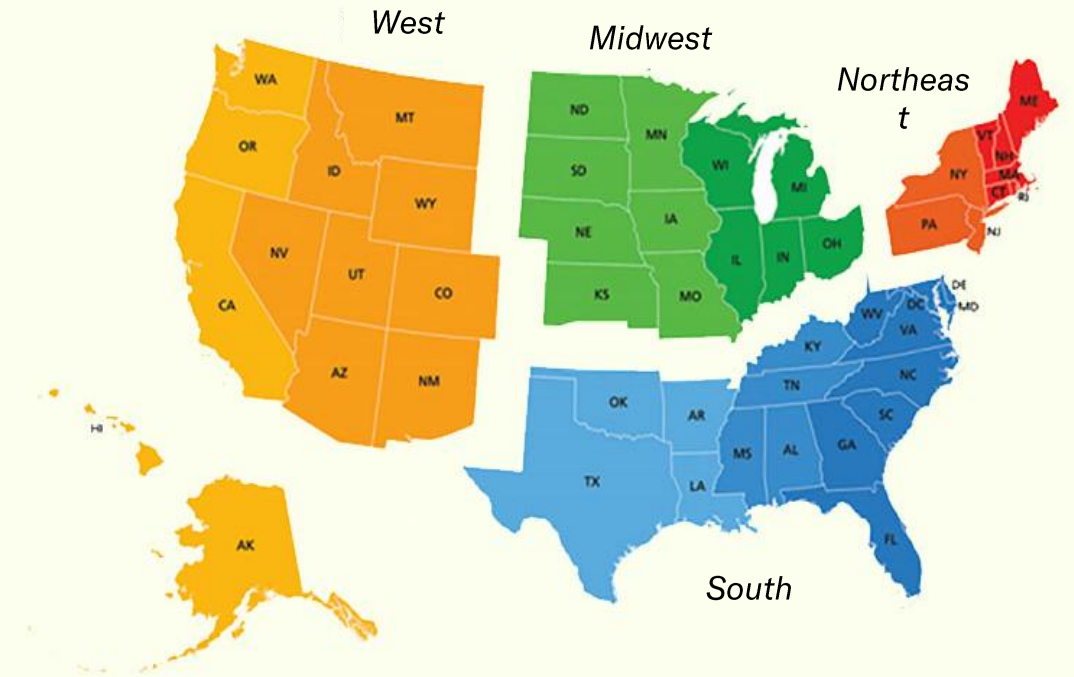
# The State of the American Traveler



# 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 **September 18-27***
- *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*



Opportunity powered by *Insight*

**Future Partners**

Shaping strategies for travel brands and  
tourism leaders that capture *hearts*,  
*minds* and *market share*

**Future Partners**



*Bringing the future of travel  
within reach*

**Future Partners**

# Today

 **Latest Travel Sentiment**

 **Trend to Watch:  
Anti-Luxury Travel**

 **Traveler Focus Group**

# Anti-Luxury Travel

The idea of anti-luxury travel has emerged as a counterpoint to traditional luxury travel. Instead of being defined by opulence, exclusivity, and high price points, anti-luxury emphasizes authenticity, meaning, and personal value.

**Future Partners**



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 overlaid with a blue gradient.

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

**[FuturePartners.com](https://FuturePartners.com)**



An aerial photograph of Central Park in New York City during autumn. The park's trees are in various shades of orange, yellow, and red. In the background, the dense Manhattan skyline is visible under a clear blue sky with some light clouds. The text "Future Partners" is overlaid in the top right corner.

**Future Partners**

**Traveler Sentiment**

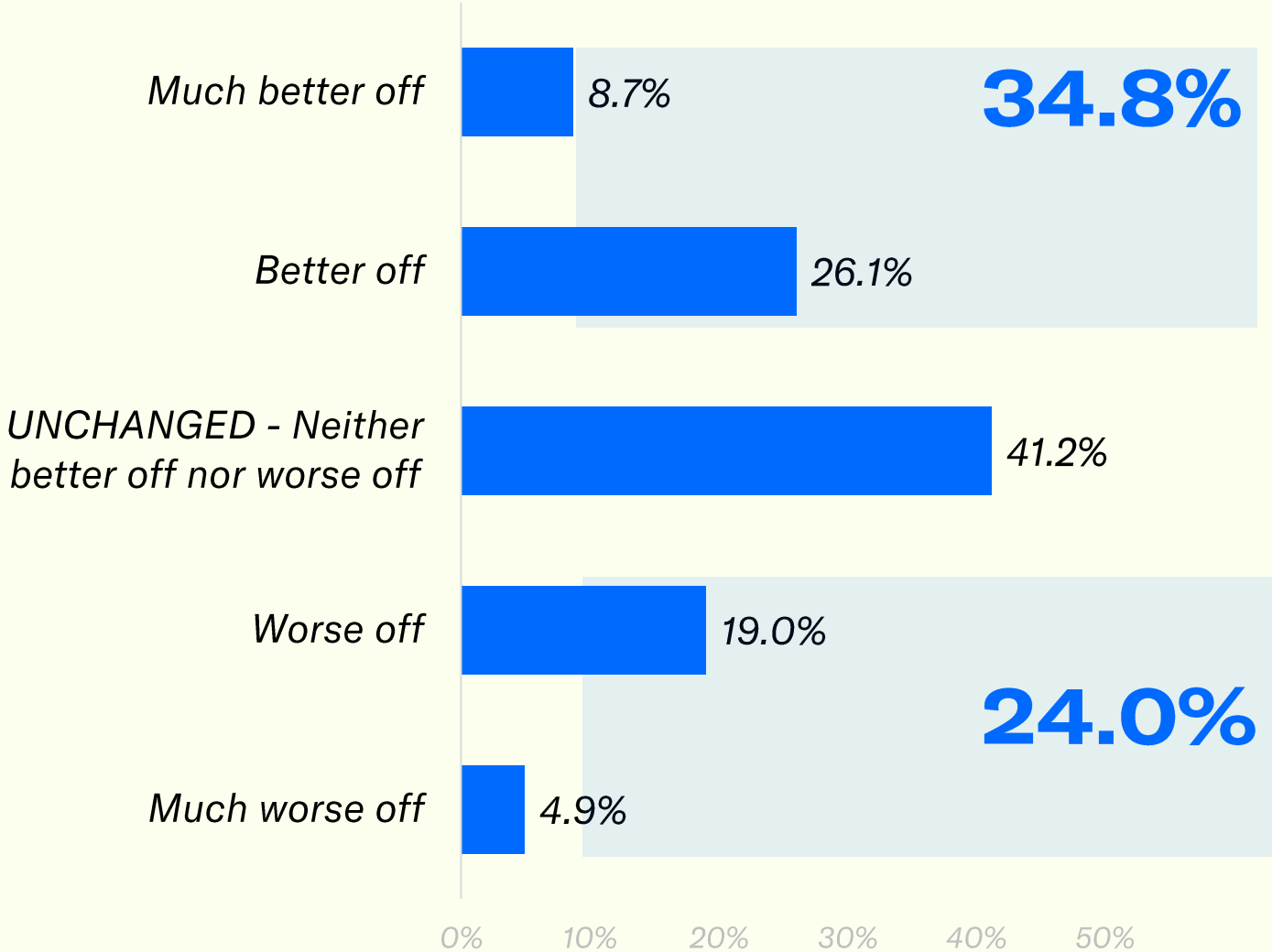
# **Steady but uneven confidence**



# 34.8% of Travelers Feel they are Financially Better Off Now than a Year Ago

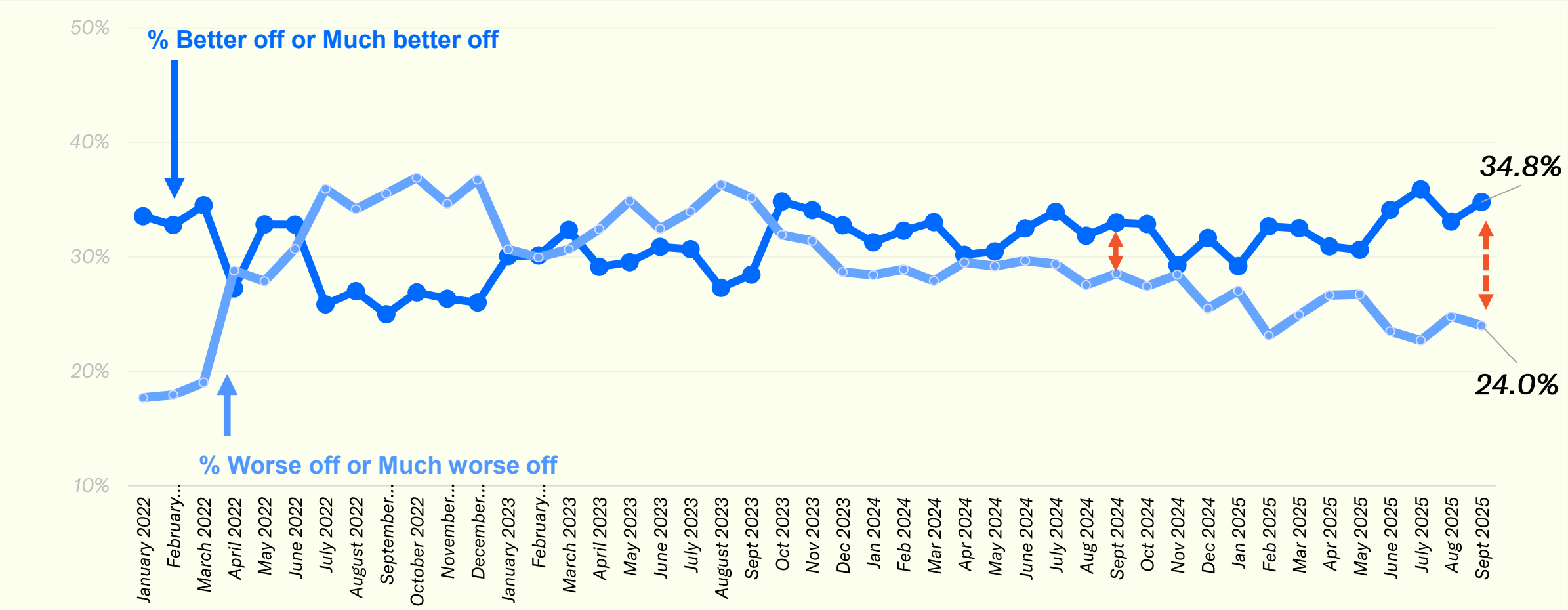
**Question:**

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



# Travelers Are Slightly More Upbeat This Month About Their Current Finances

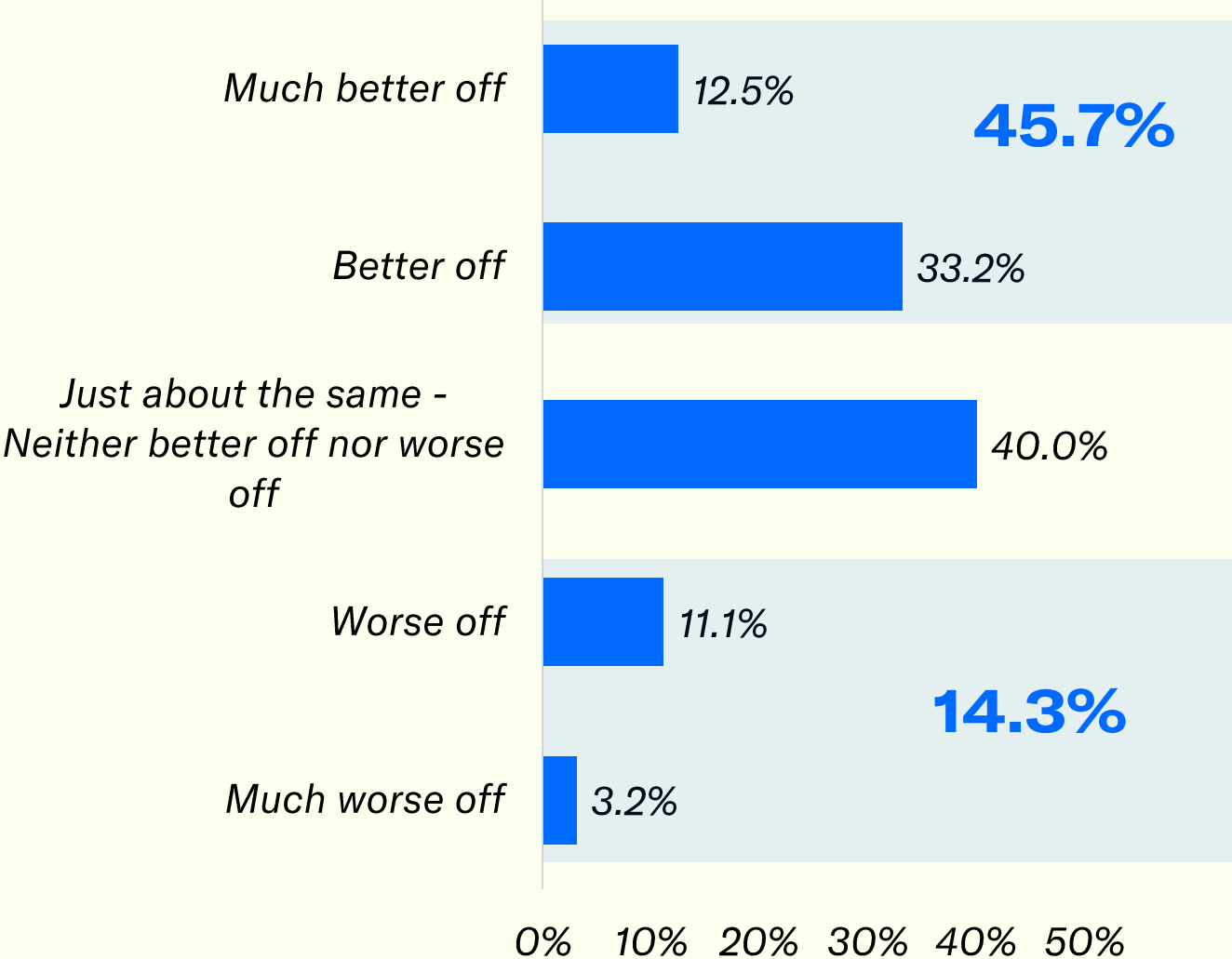
**Question:** *Would you say that you (and your household) are better off or worse off financially than you were a year ago?*



# 45.7% of Travelers Feel Optimistic about their Financial Future

## Question:

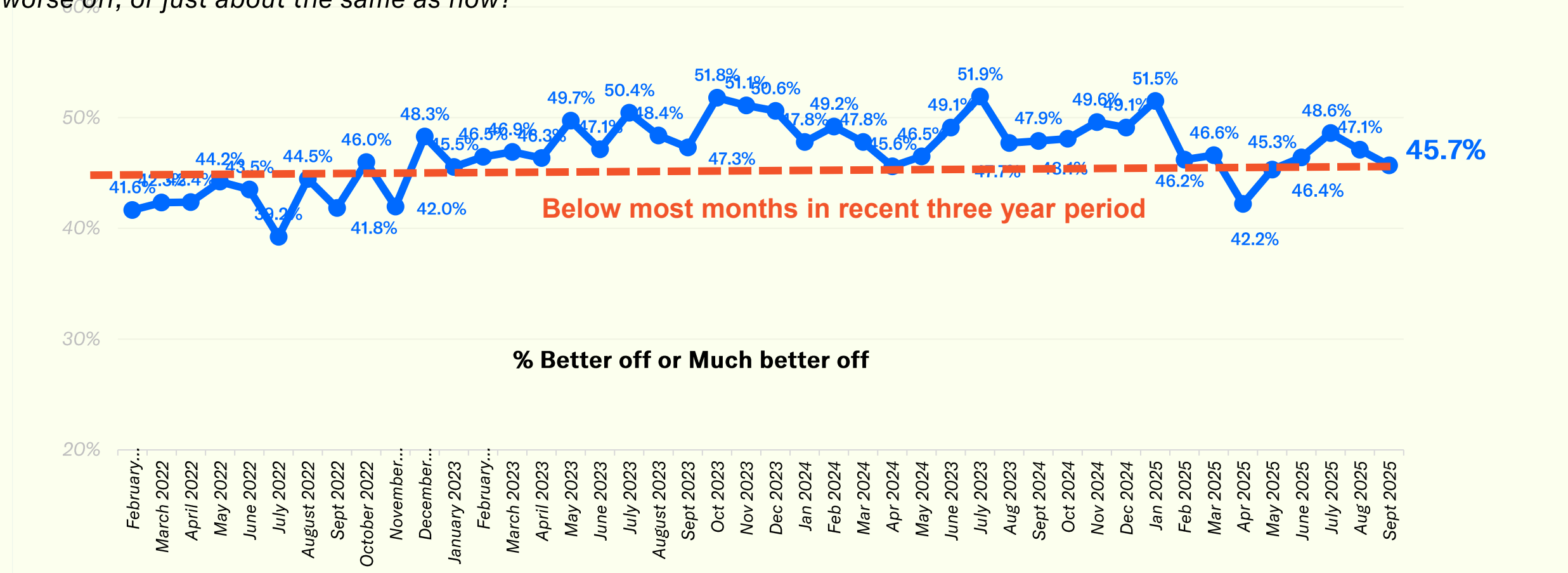
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?





# Future Financial Optimism is Softening

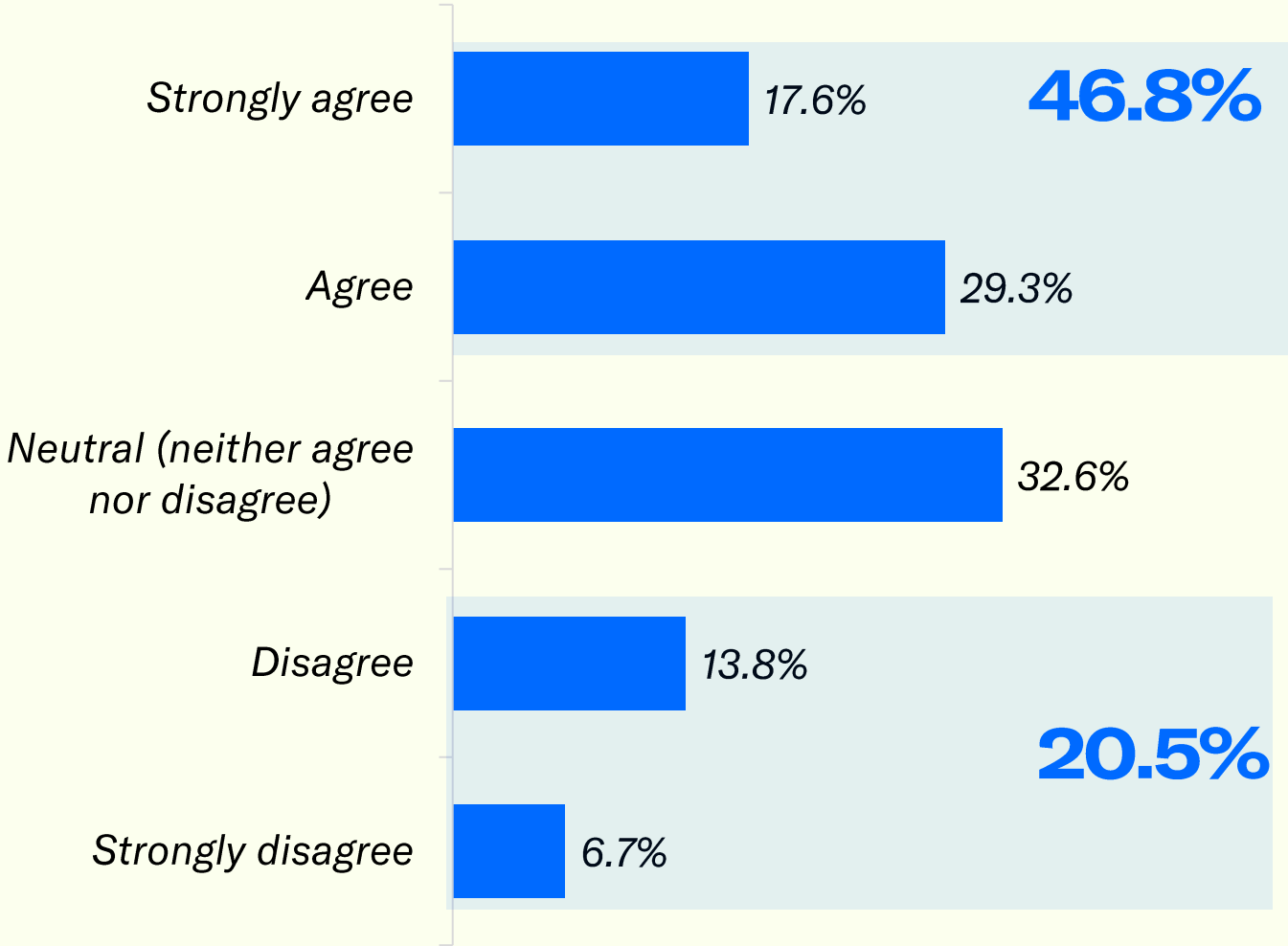
**Question:** *LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?*



# 46.8% of American Travelers Anticipate an Impending Recession

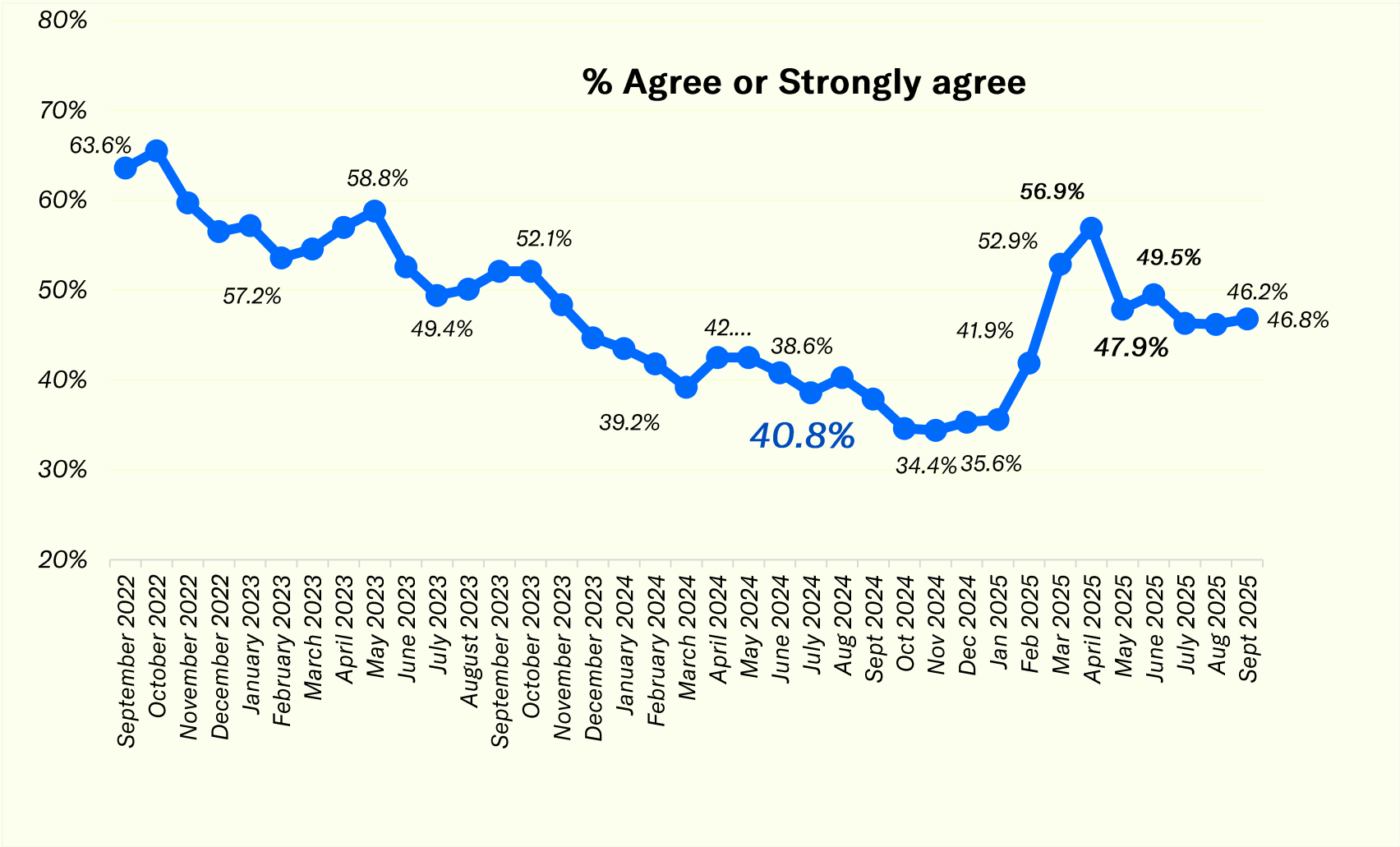
## Statement Agreement:

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



# Recession Concerns Among American Travelers Unchanged Again This Month but Up 9-Points YOY

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



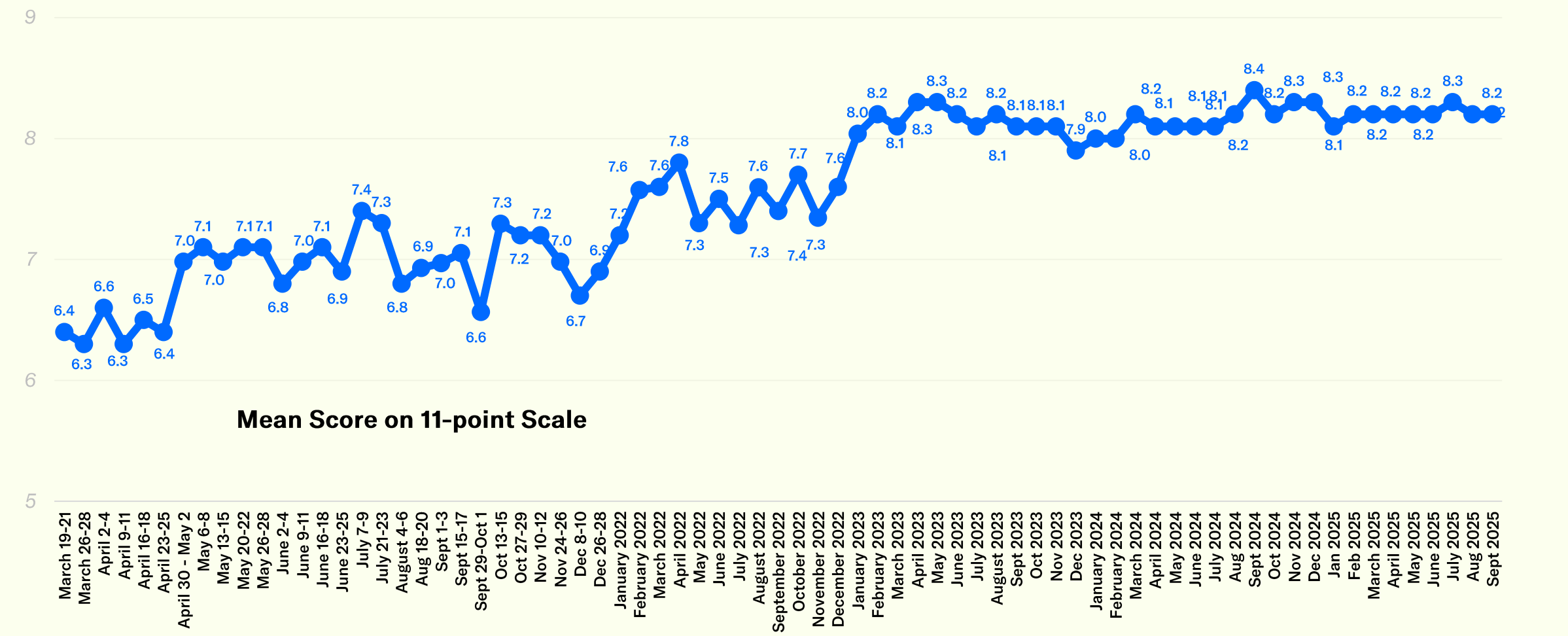


# How are Americans adapting their travel given their current financial sentiment?

# Americans are still making room for travel

# Travel Enthusiasm Endures

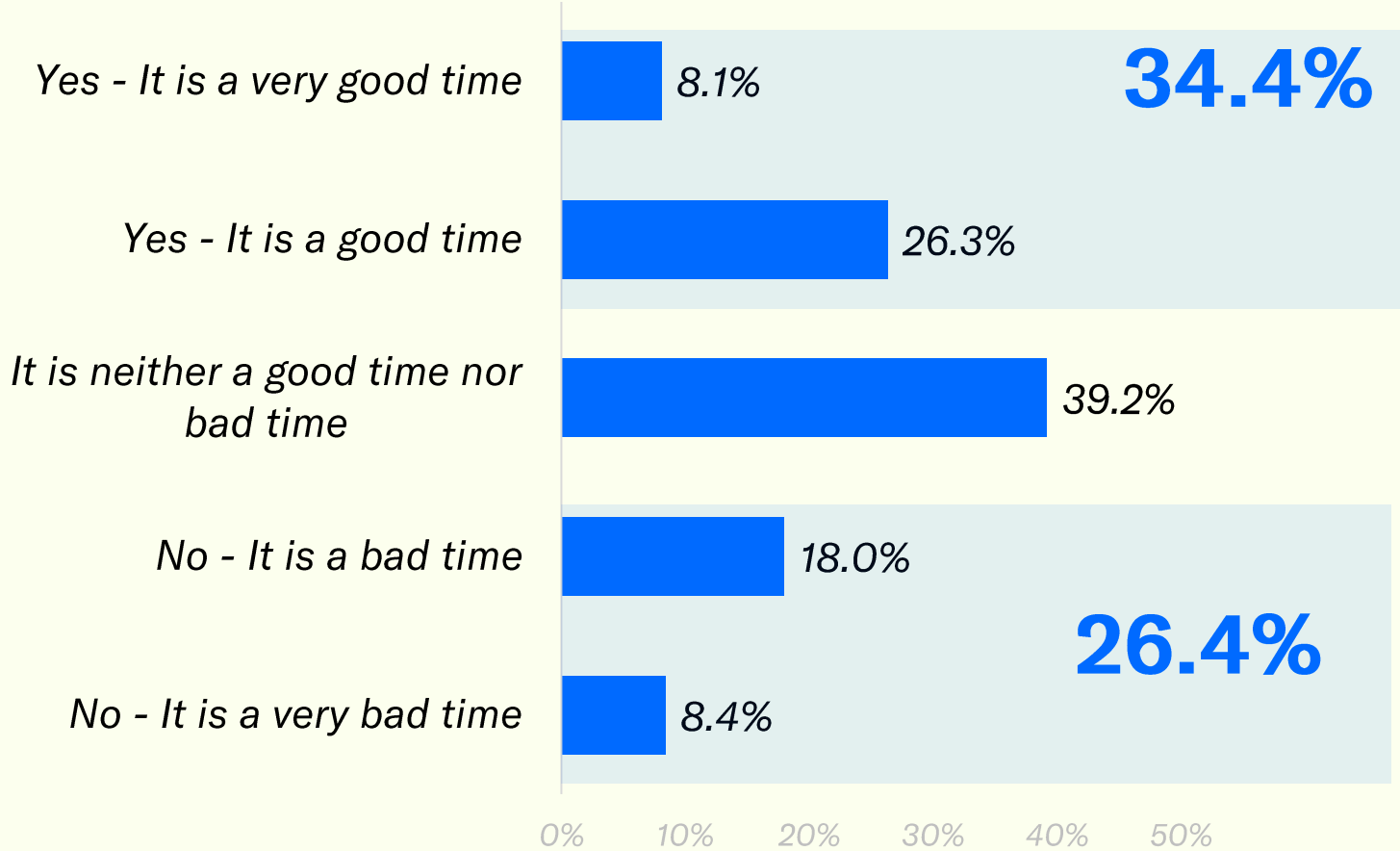
**Question:** Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# 34.4% Believe that it's a Good Time to Spend on Travel

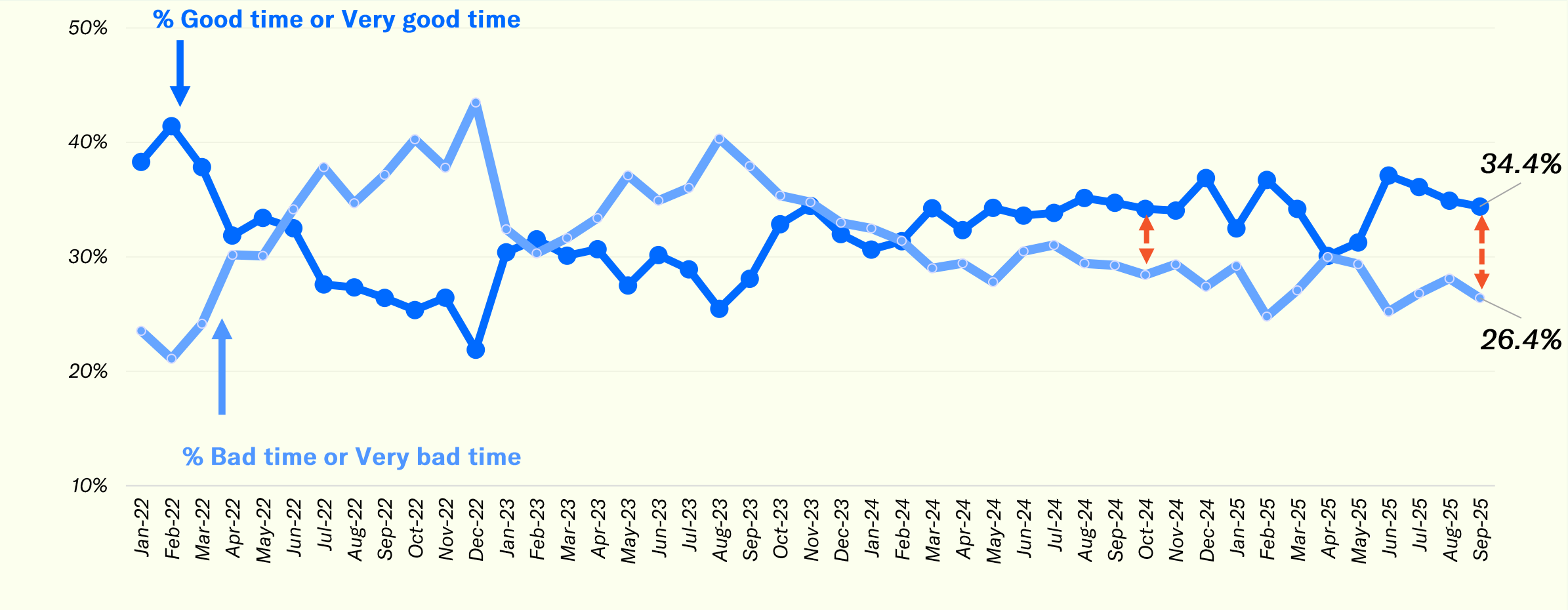
## Question:

*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?*



# Travel Spending Confidence Continues a Slow 3-Month Decline but is on Par with 2024 Levels

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?



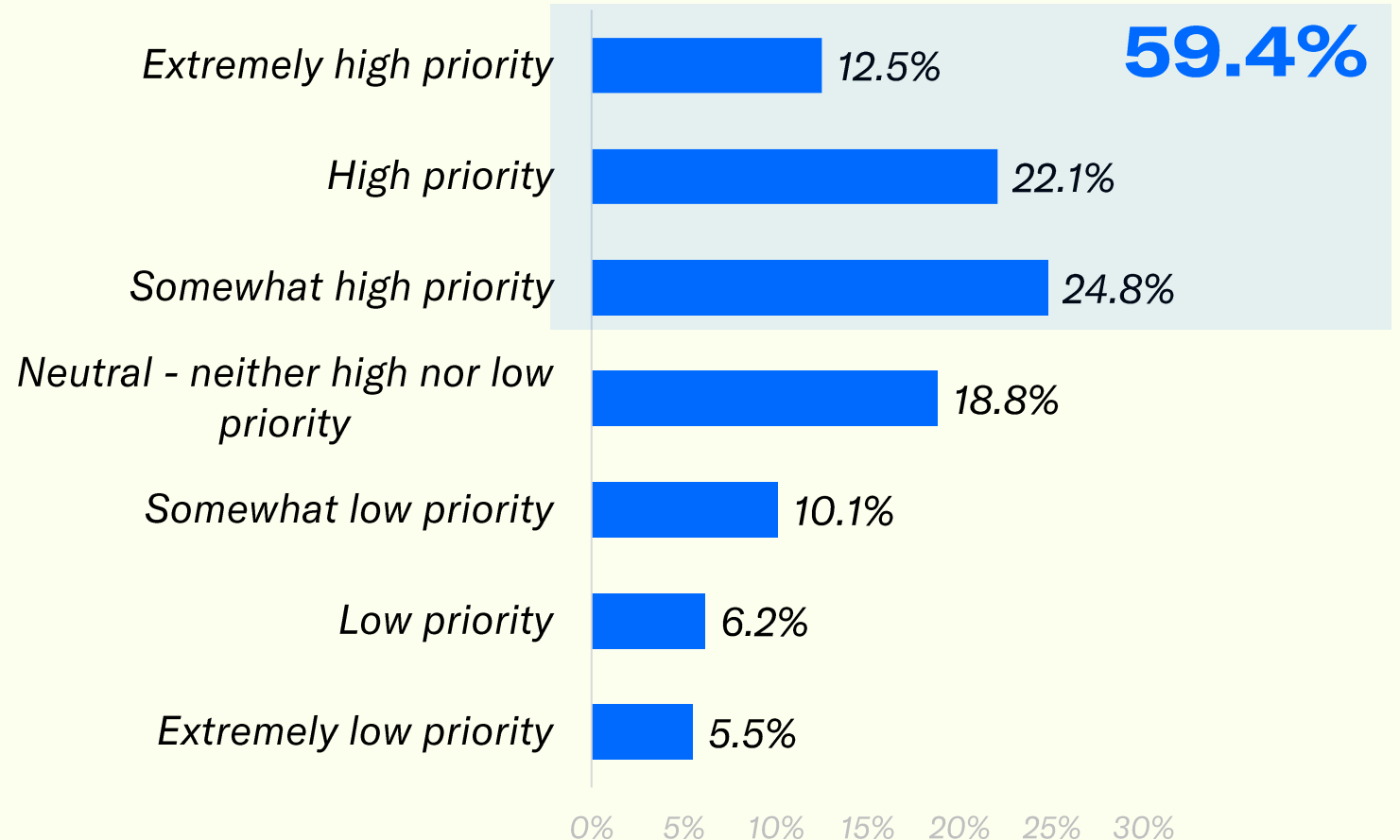


# Nearly 60% Say Travel will be a Personal Budget Priority

## Question:

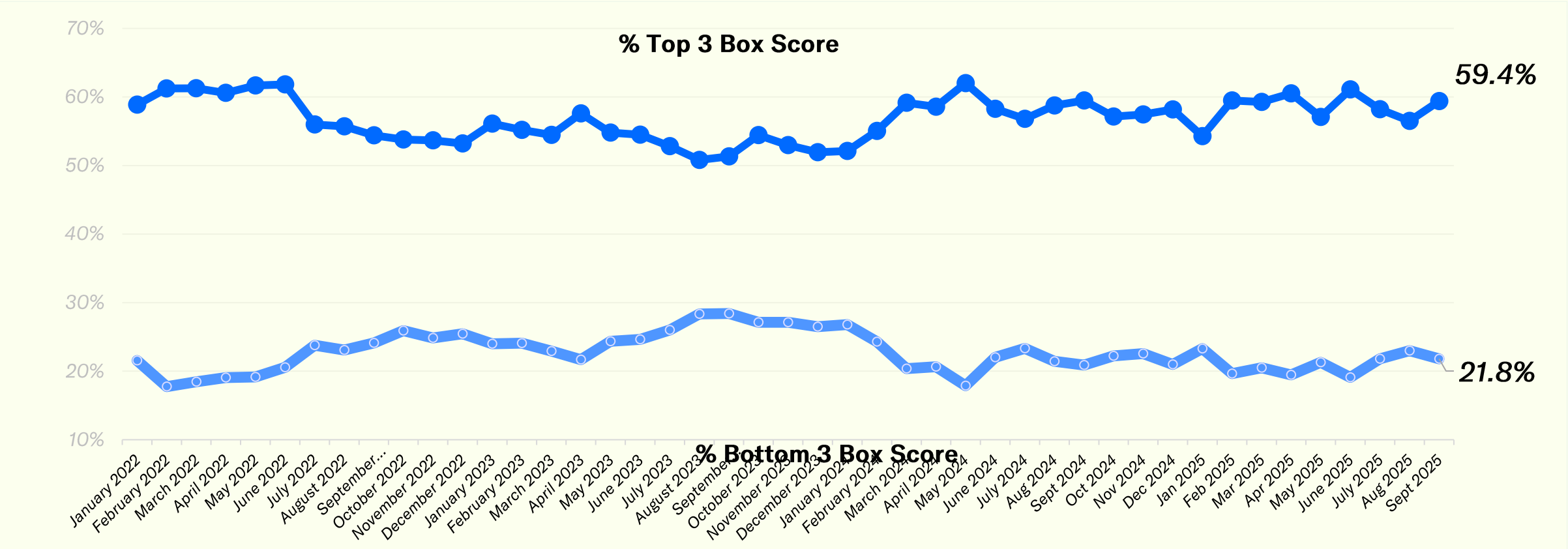
*Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.*

*Leisure travel will be a(n) \_\_\_\_\_.*



# Travel as a Budget Priority Remains Steady

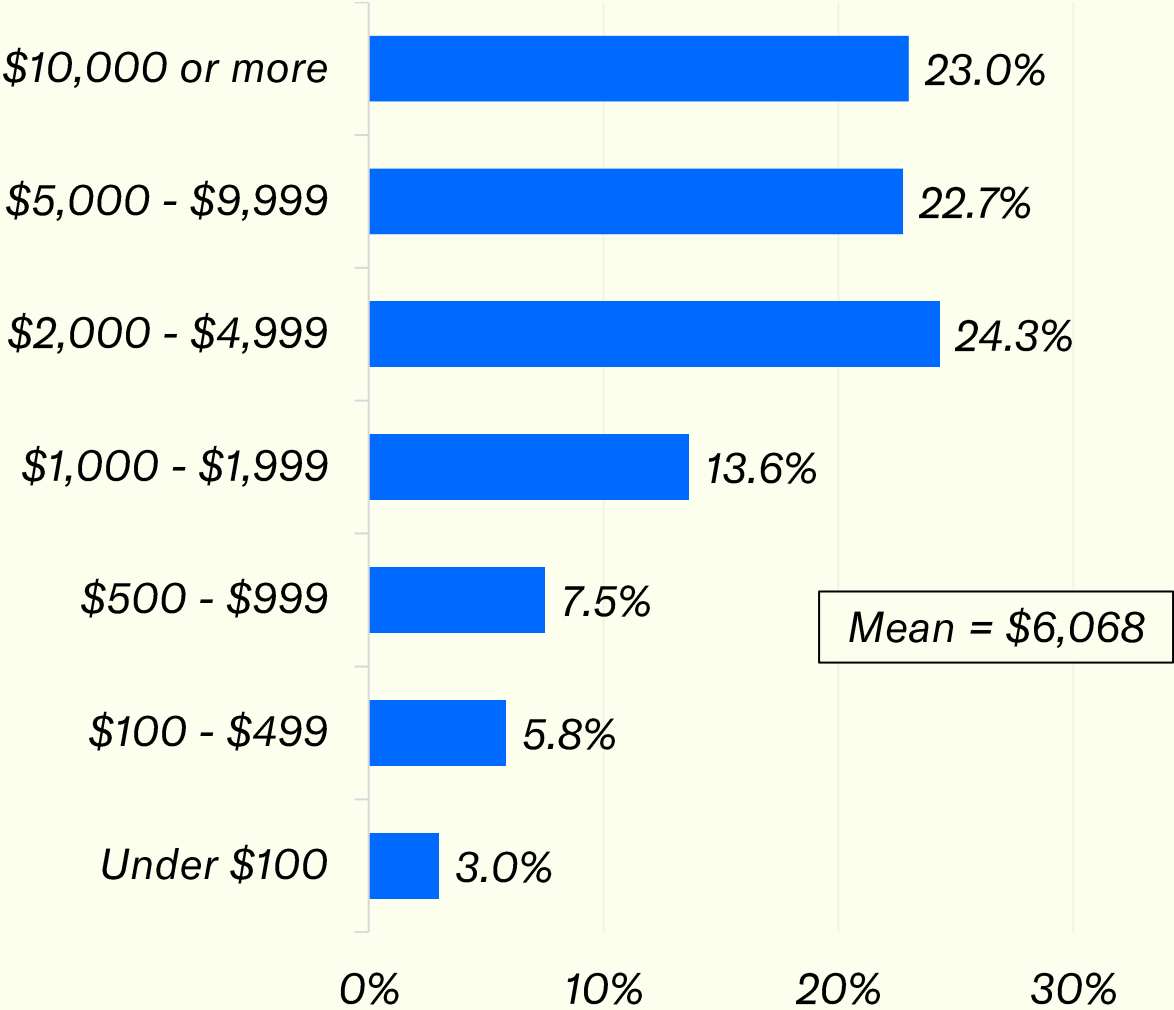
**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



# Americans Report an Average Annual Travel Budget of \$6,068

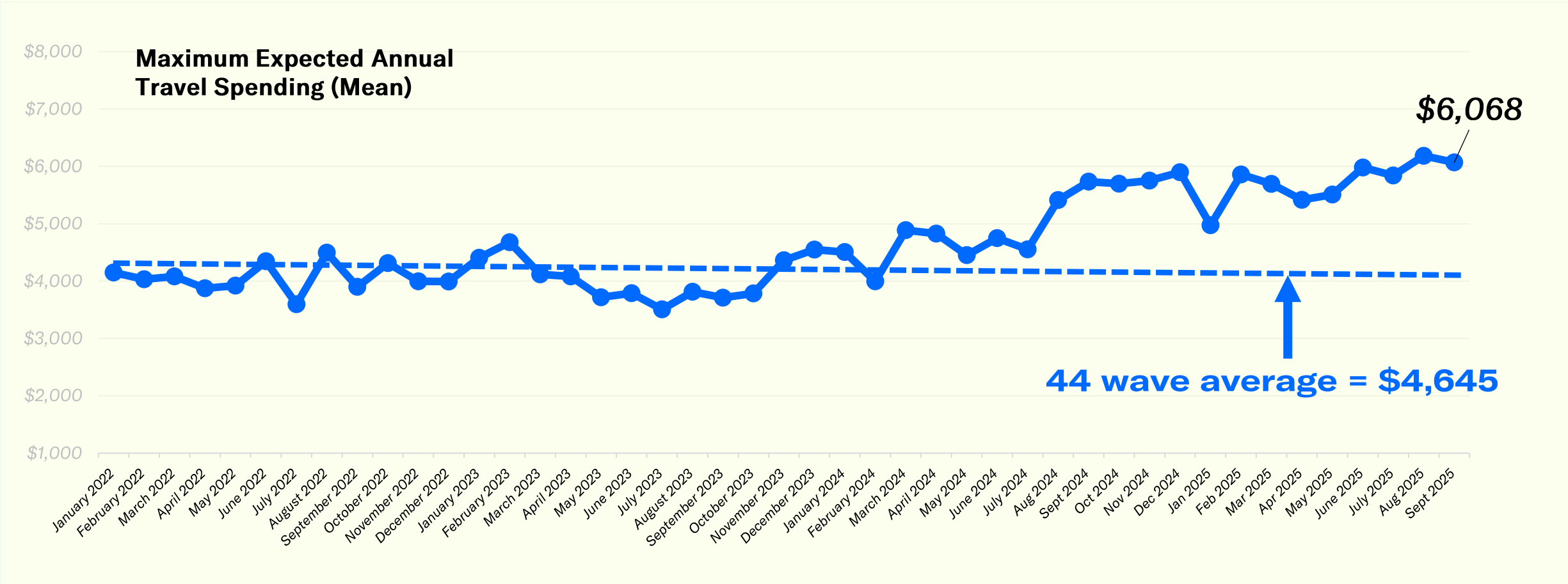
## Question:

*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?*



# Travel Budgets Continue to Soar

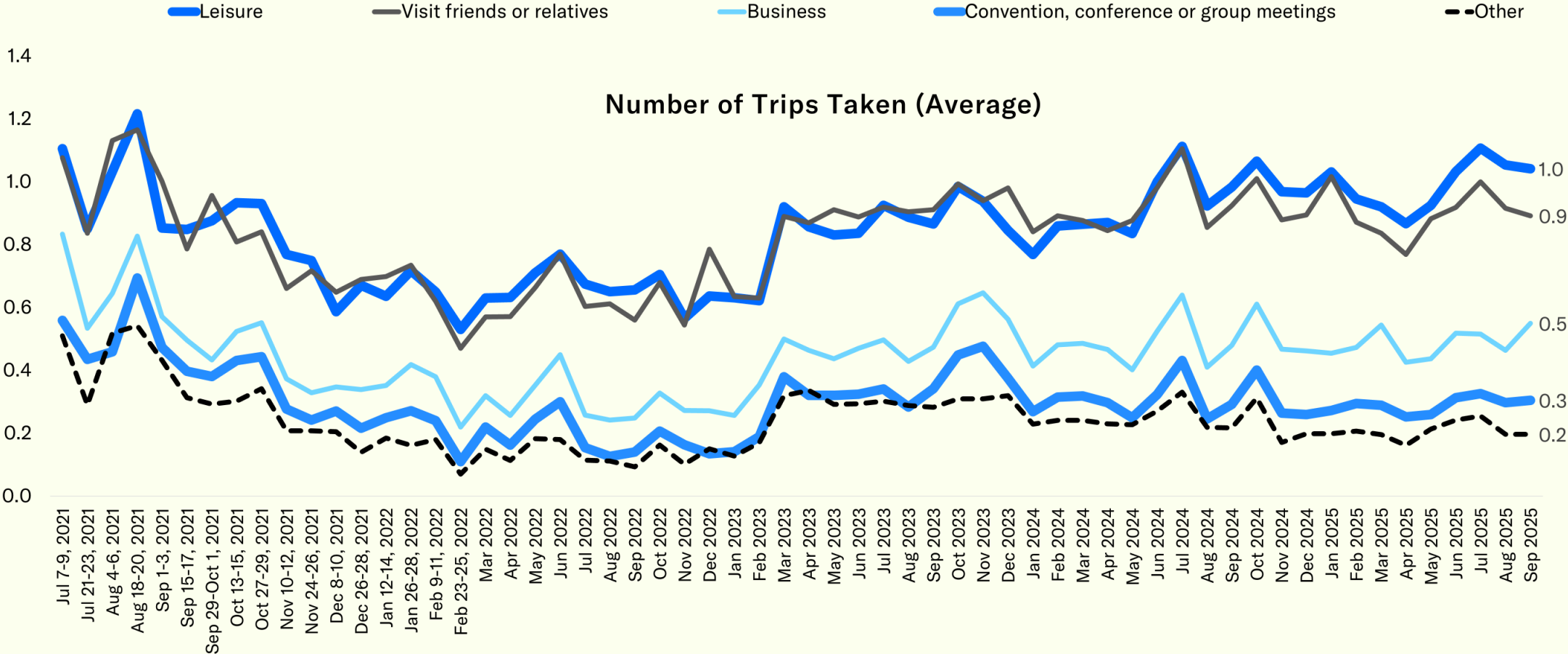
*Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):*



# Leisure Travel Volume had a Slight Dip in September Compared to August but is Stable

## Question:

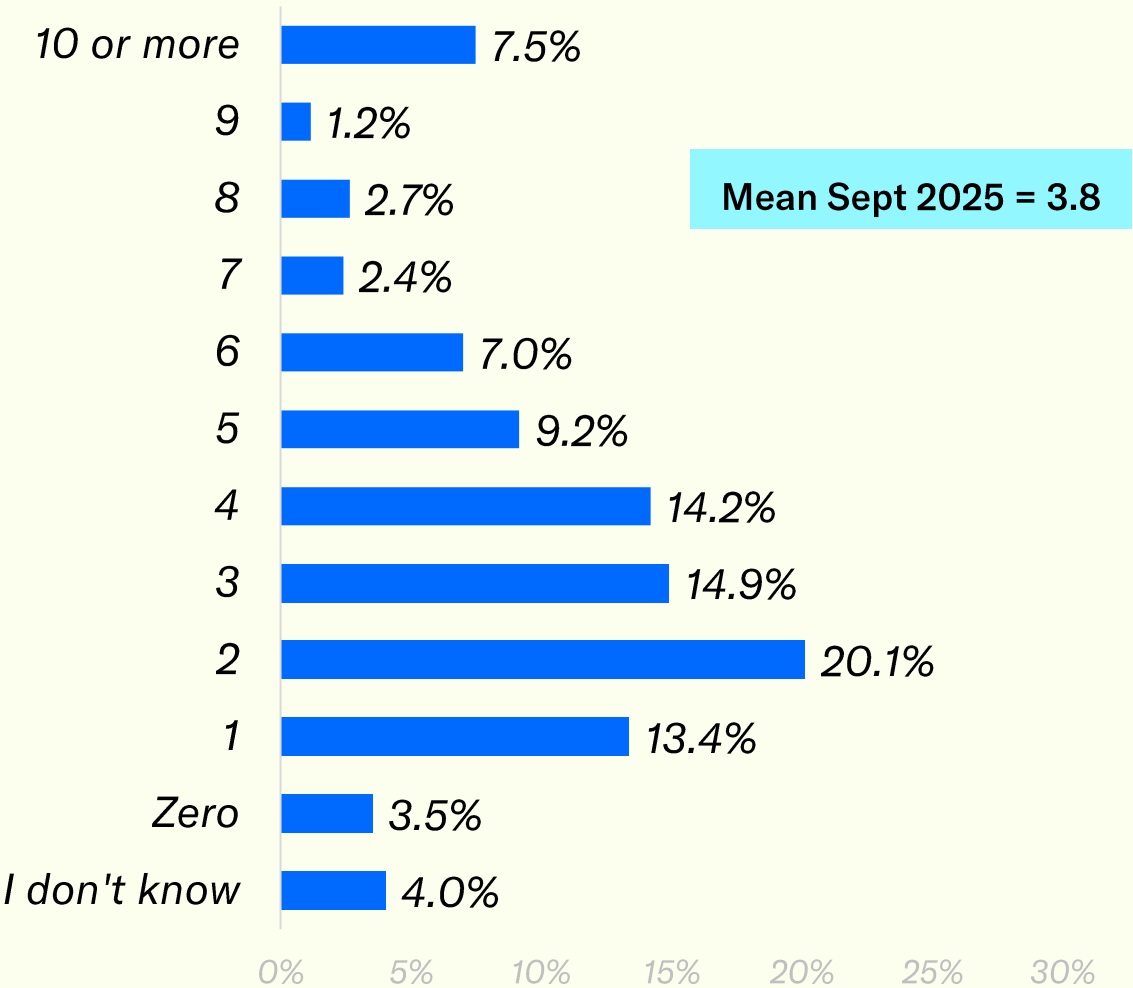
How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)





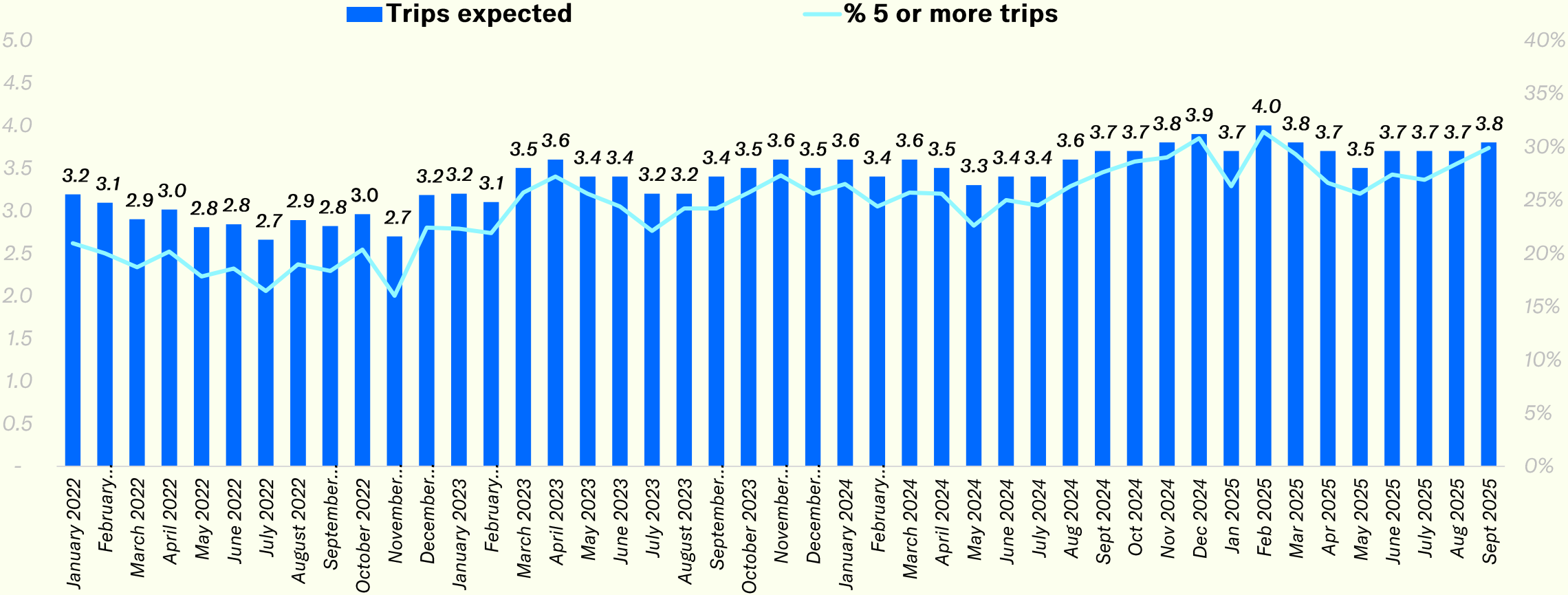
# Expected Trip Volume Holds Steady This Month

**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?*



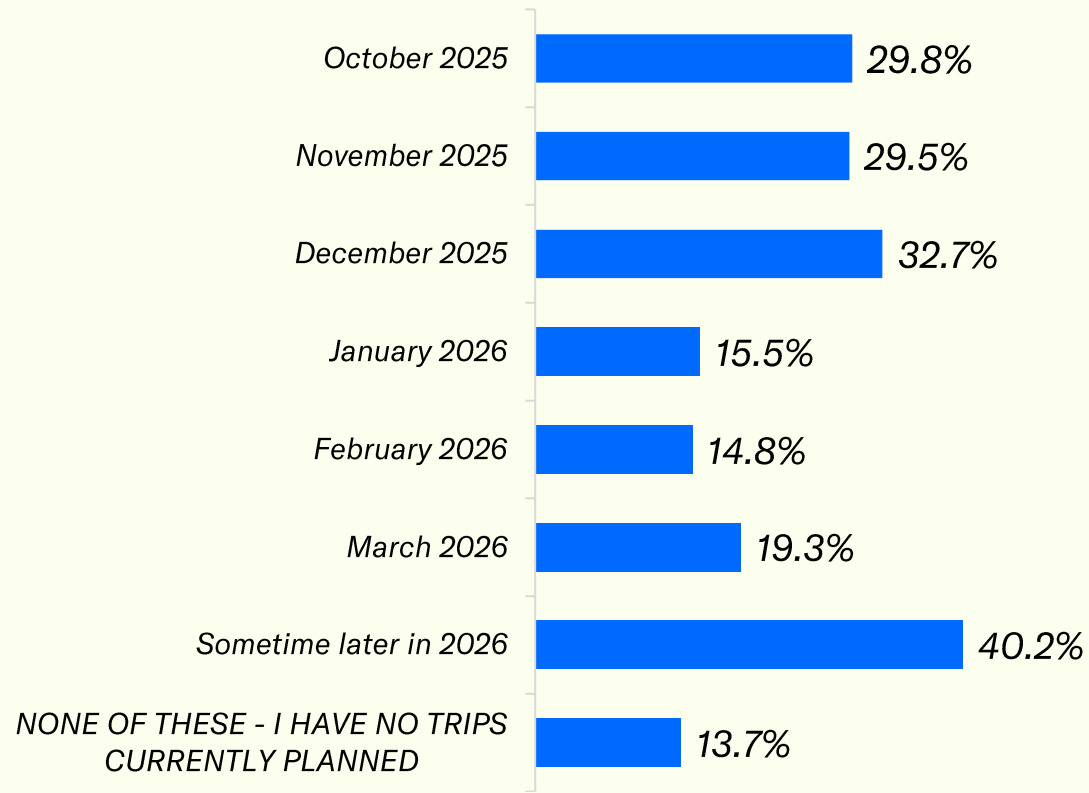
# Expected Trip Volume Shows a Slight Gain Over the Last 6 Months

**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?*



# Over 86% of Travelers Have at Least One Upcoming Trip Currently Planned

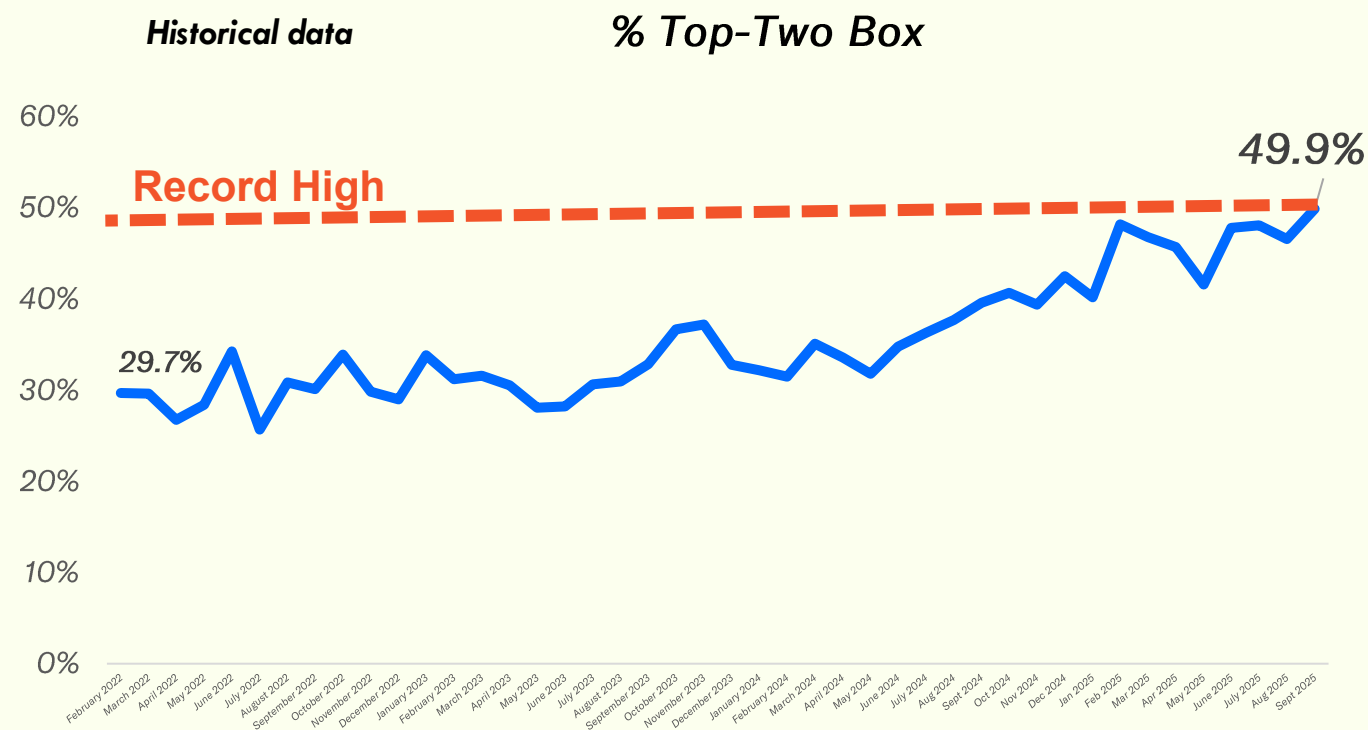
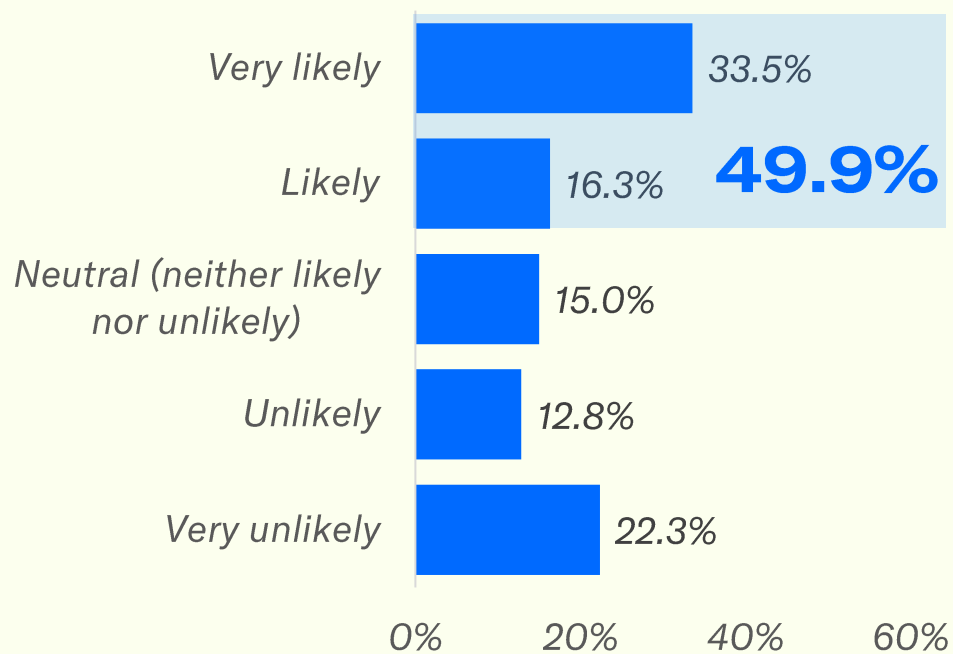
**Question:** *In which months do you currently have any leisure trips planned (even if only tentatively)?*



86.3%  
have at least one trip  
currently planned

# Record High for International Travel Plans

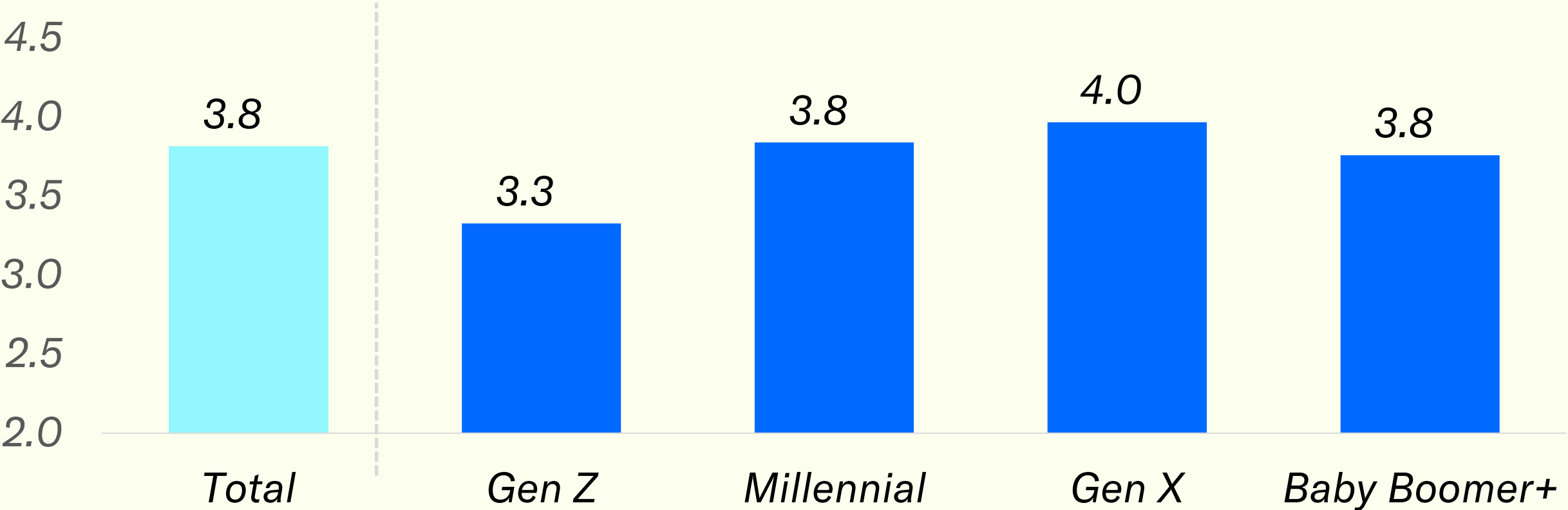
**Question:** How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?



# Gen X Ready to Book, GenZ More Reticent

**Question:**

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

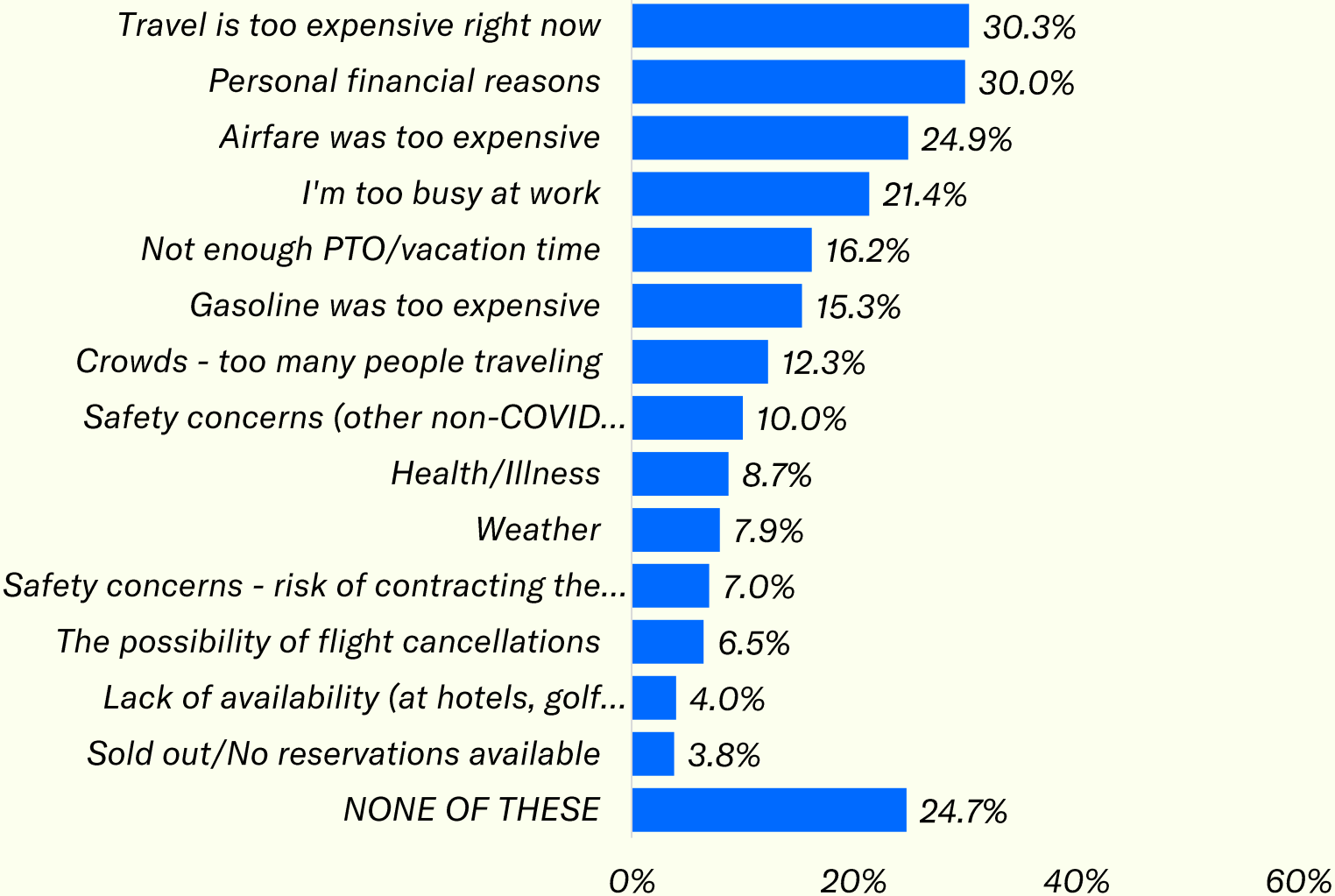




# Deterrents to Traveling in the Past 6 Months

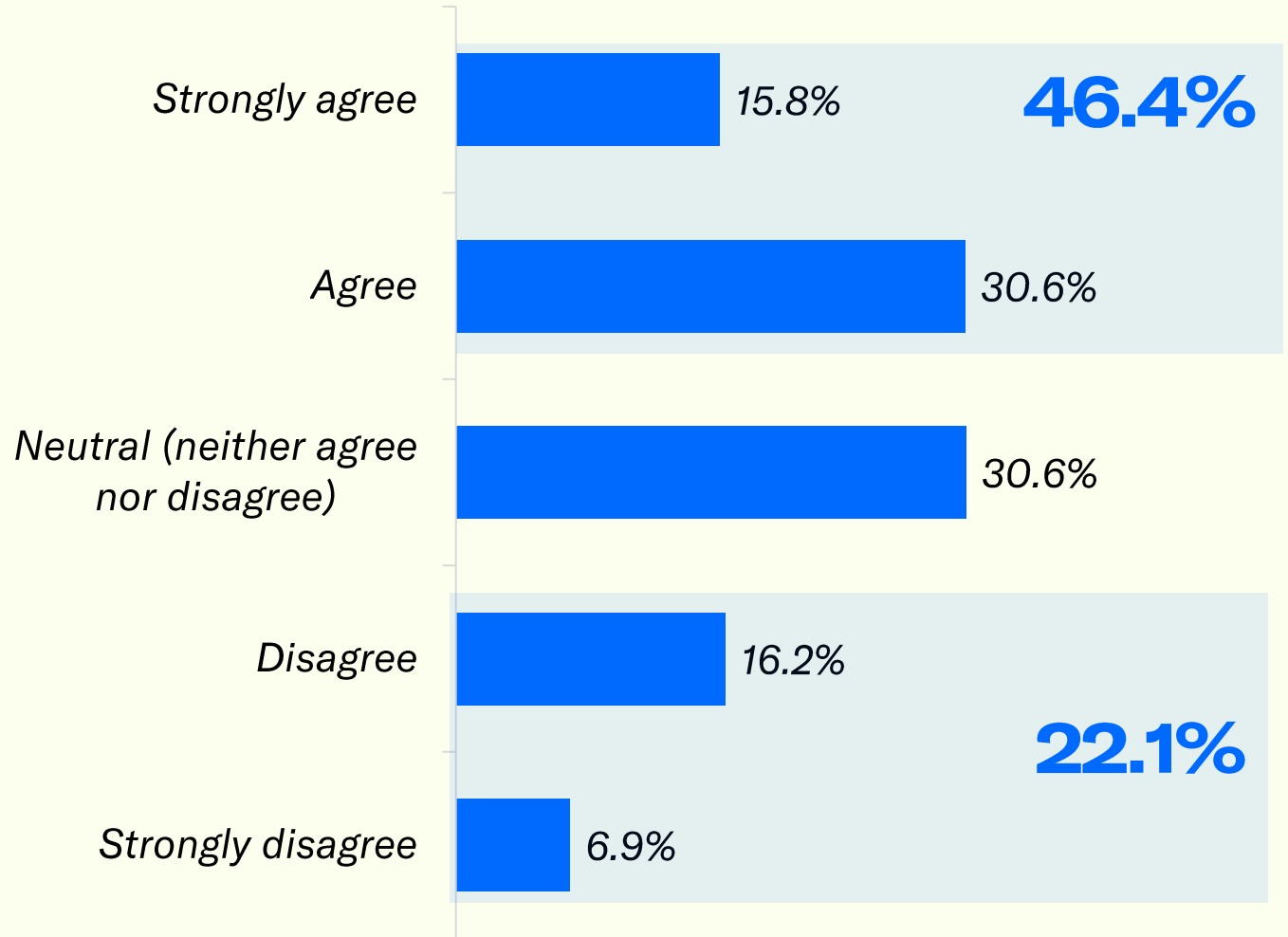
**Question:**

*In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)*



# Nearly Half of Travelers Report Being More Cautious with Money Amid Economic Concerns

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

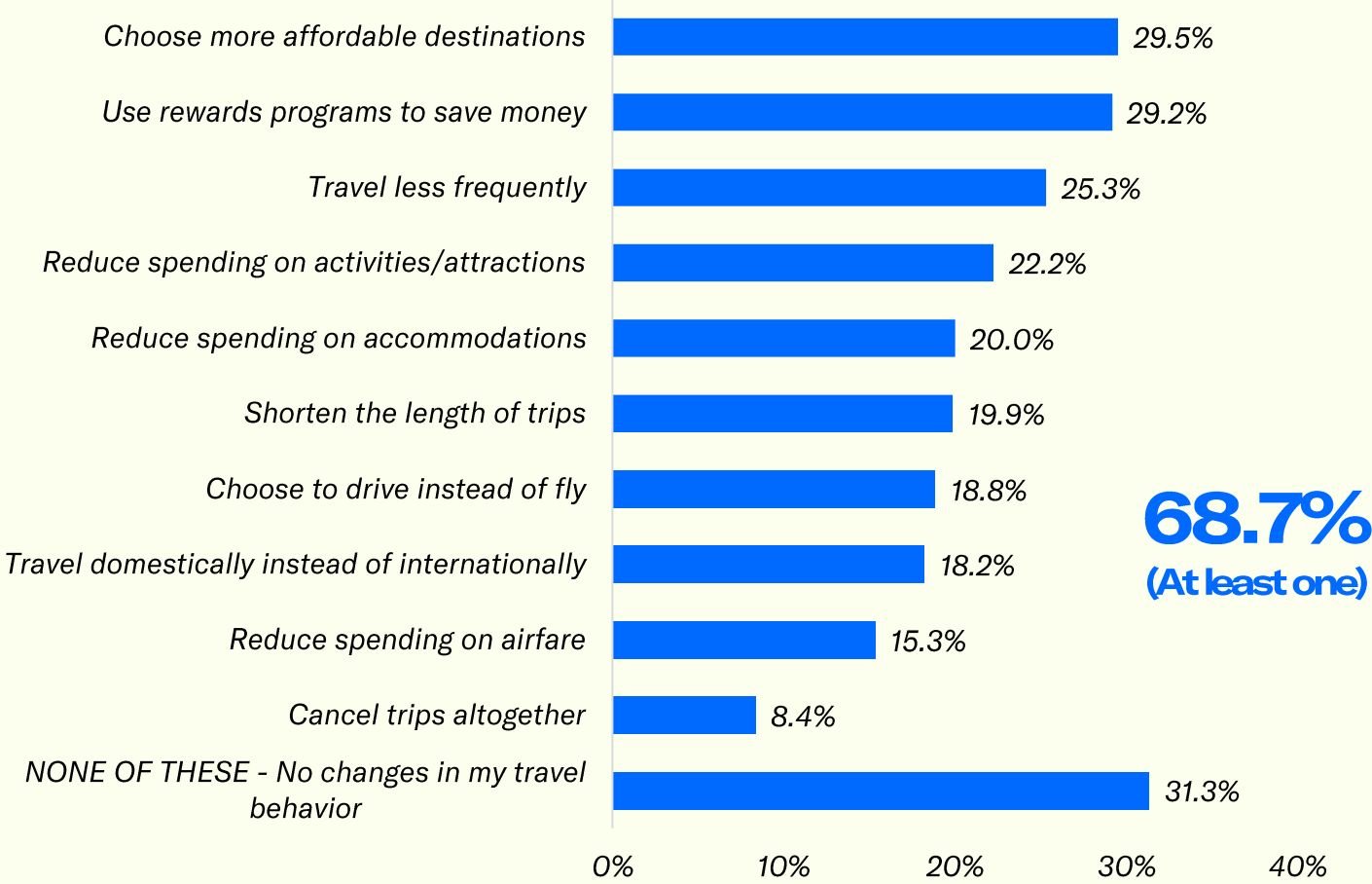


# More than Two-Thirds of Travelers Plan to Adjust Behavior Due to Economic Concerns

**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.*

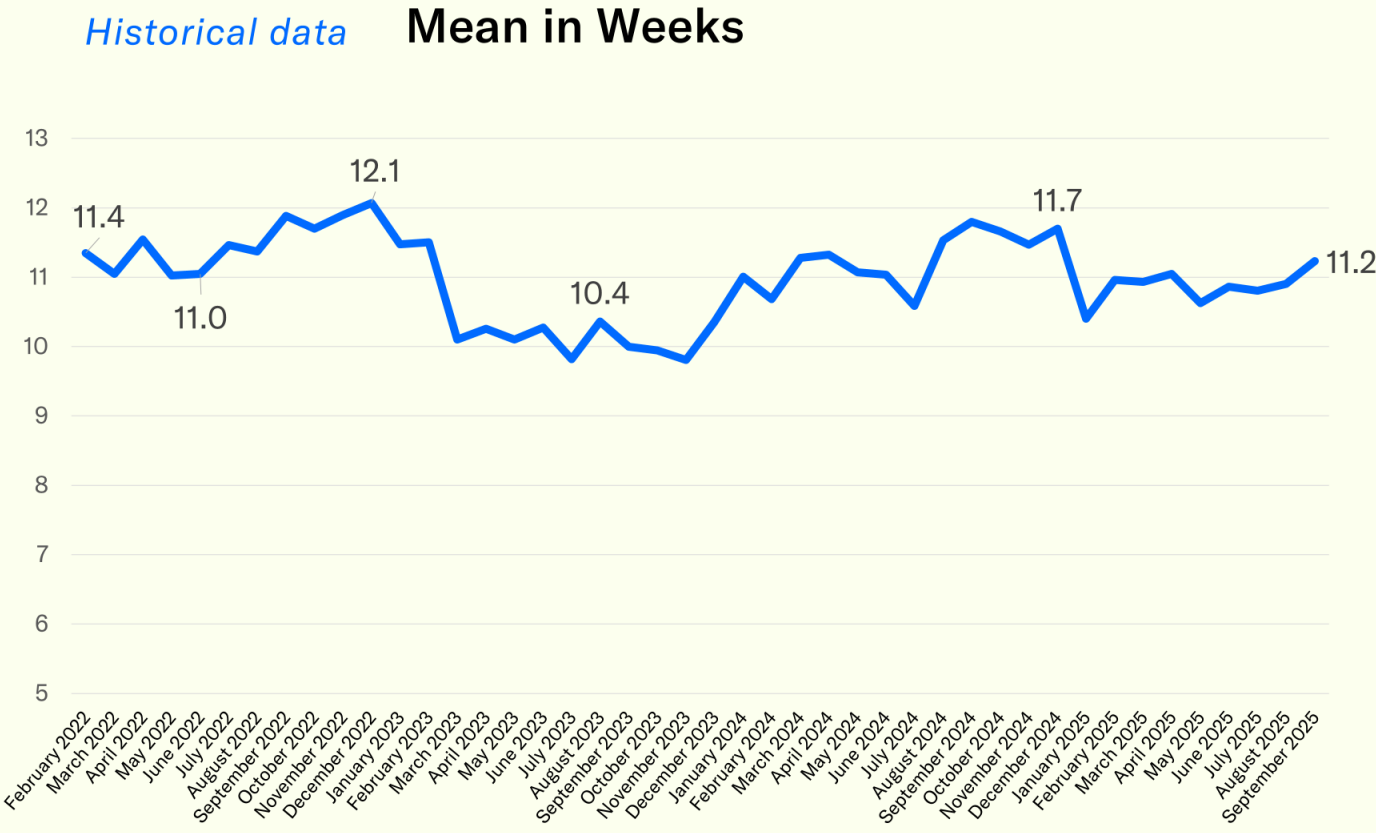
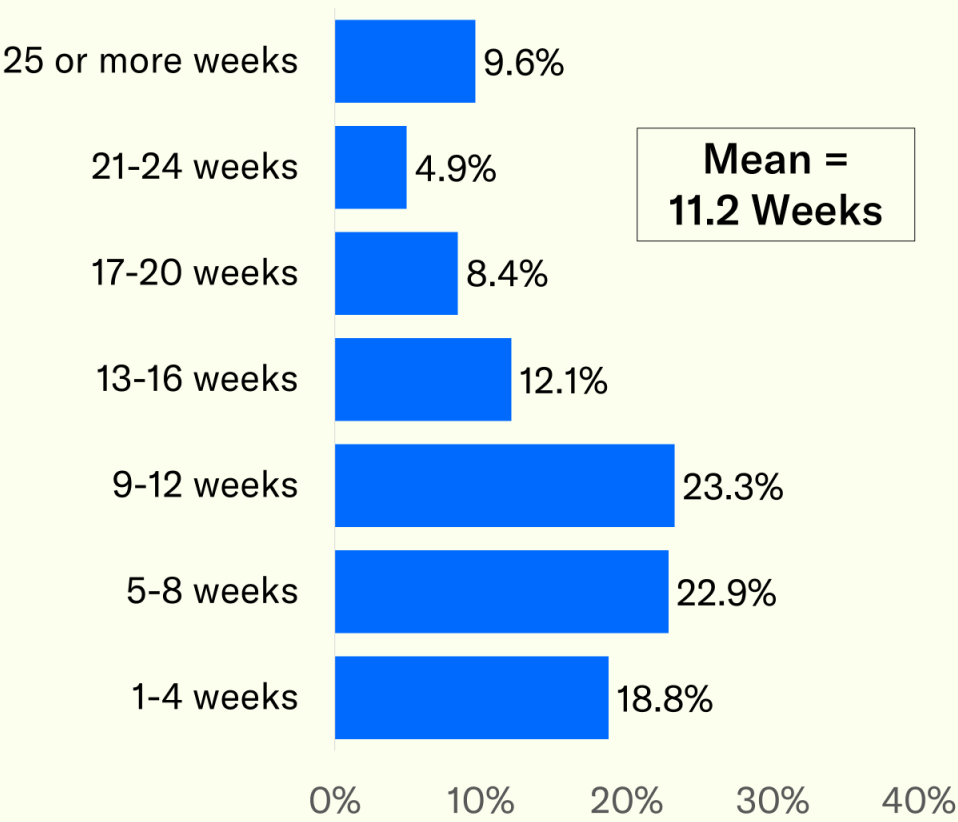
*Due specifically to concerns about the economy, I expect to*





# The Average Planning Window for a Domestic Vacation is 11.2 Weeks Out

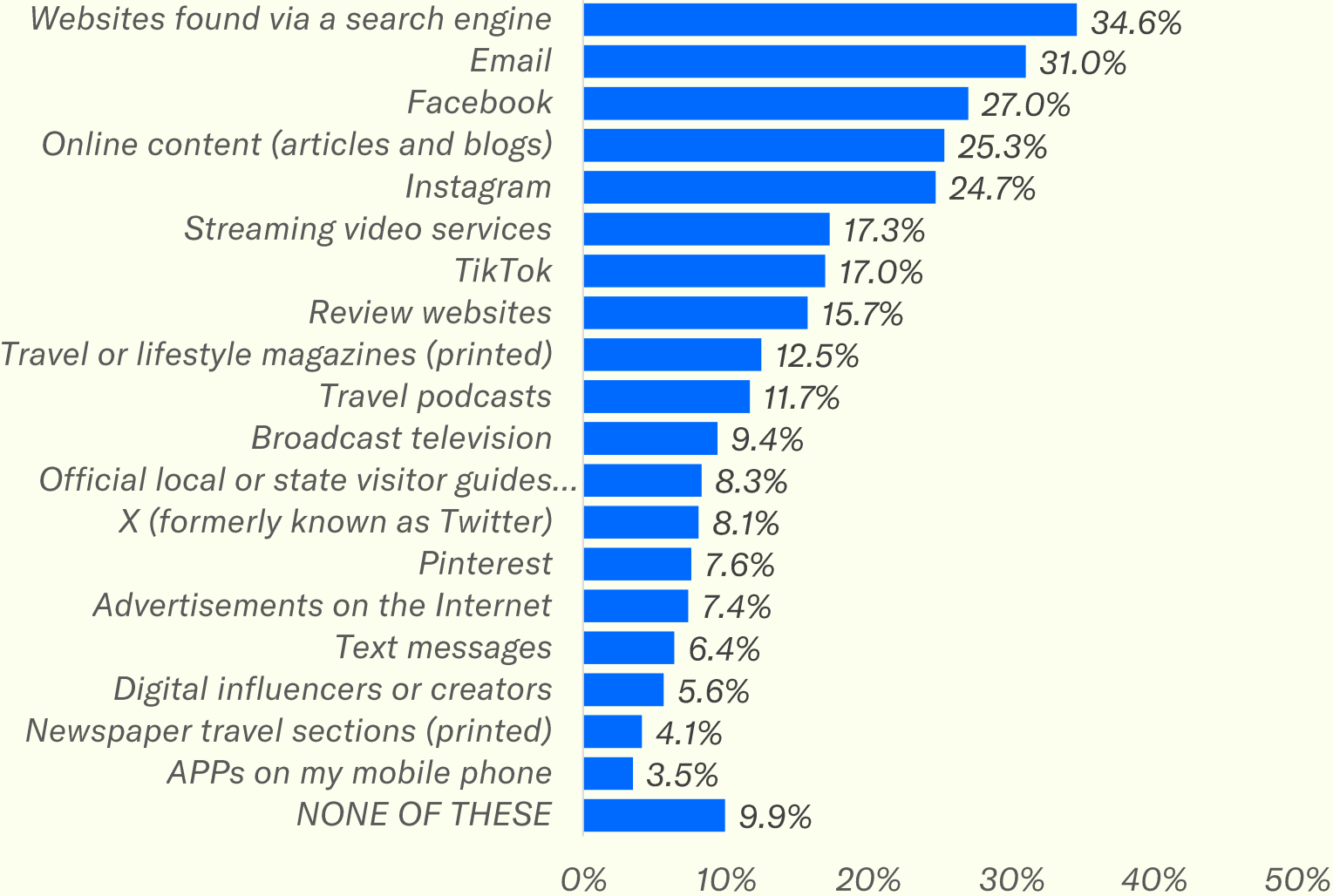
**Question:** How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



# Travelers Seek Inspiration on Search, Streaming, Social

**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? (Please select all that apply)



# **Future Partners**

## **Recession-Proof Traveler Profile**

**Available Now through your The State of the American  
Traveler Insights Explorer Subscription**



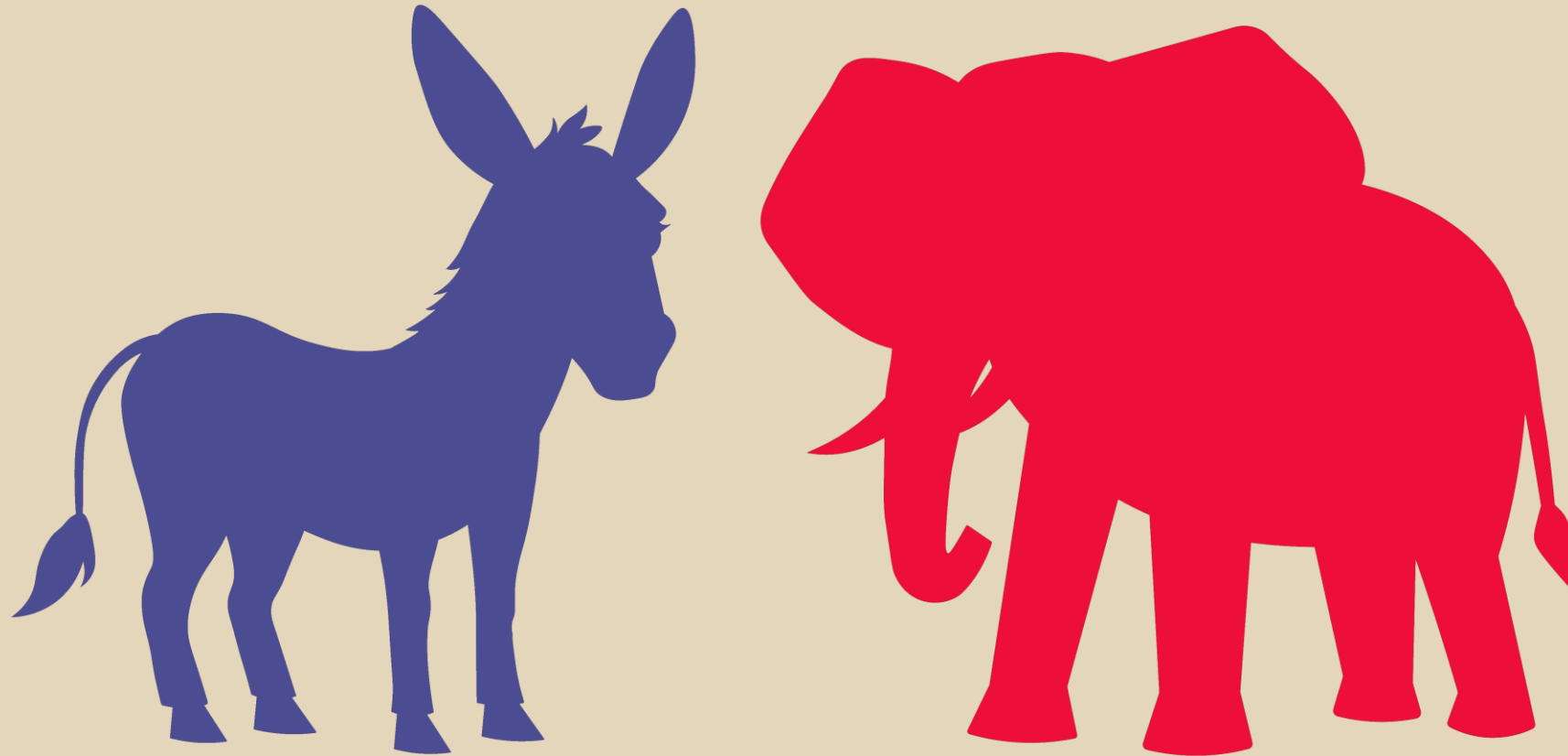
# Traveler Segments





## Segmentation

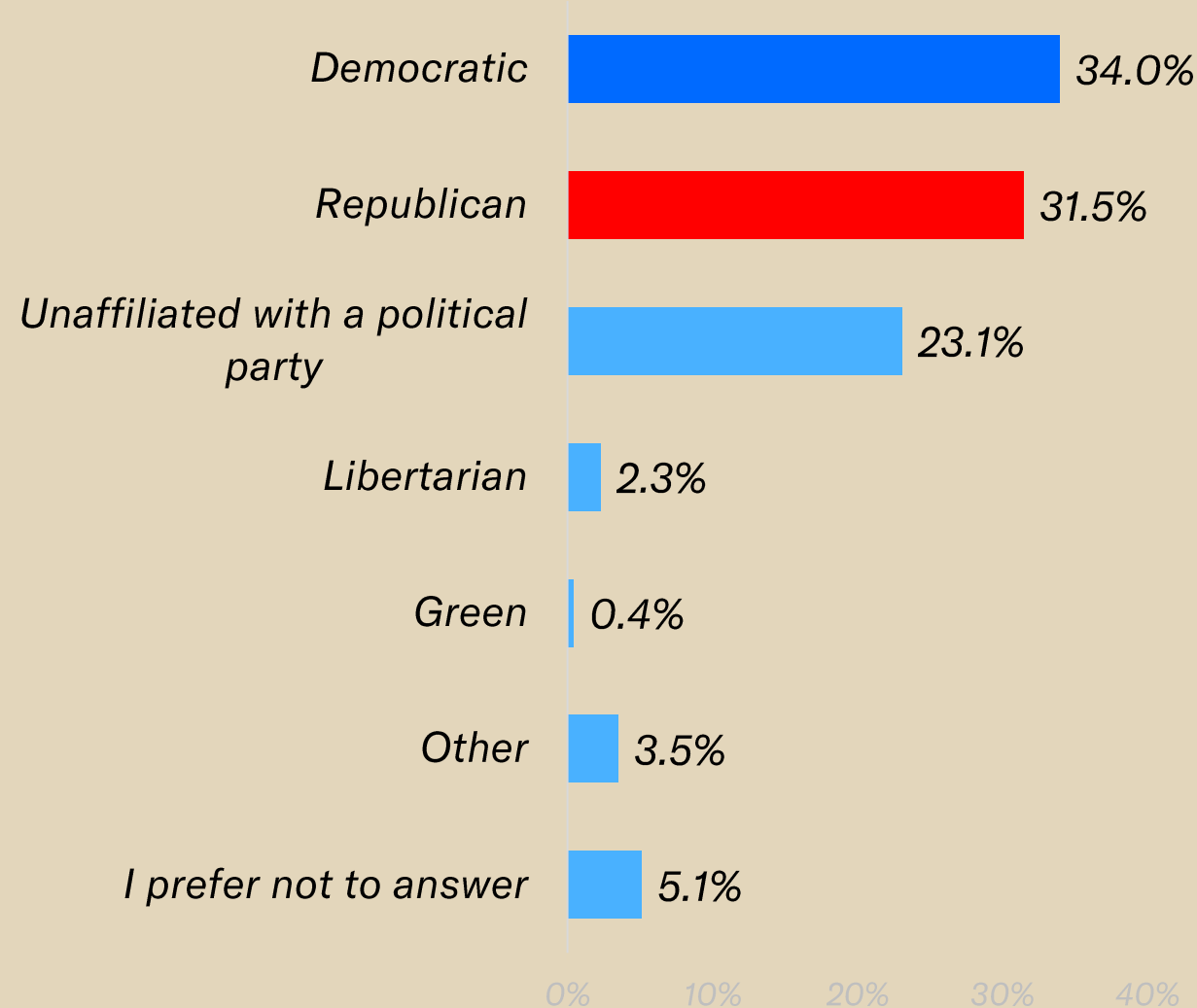
# Politics & Travel



# American Travelers' Political Inclinations

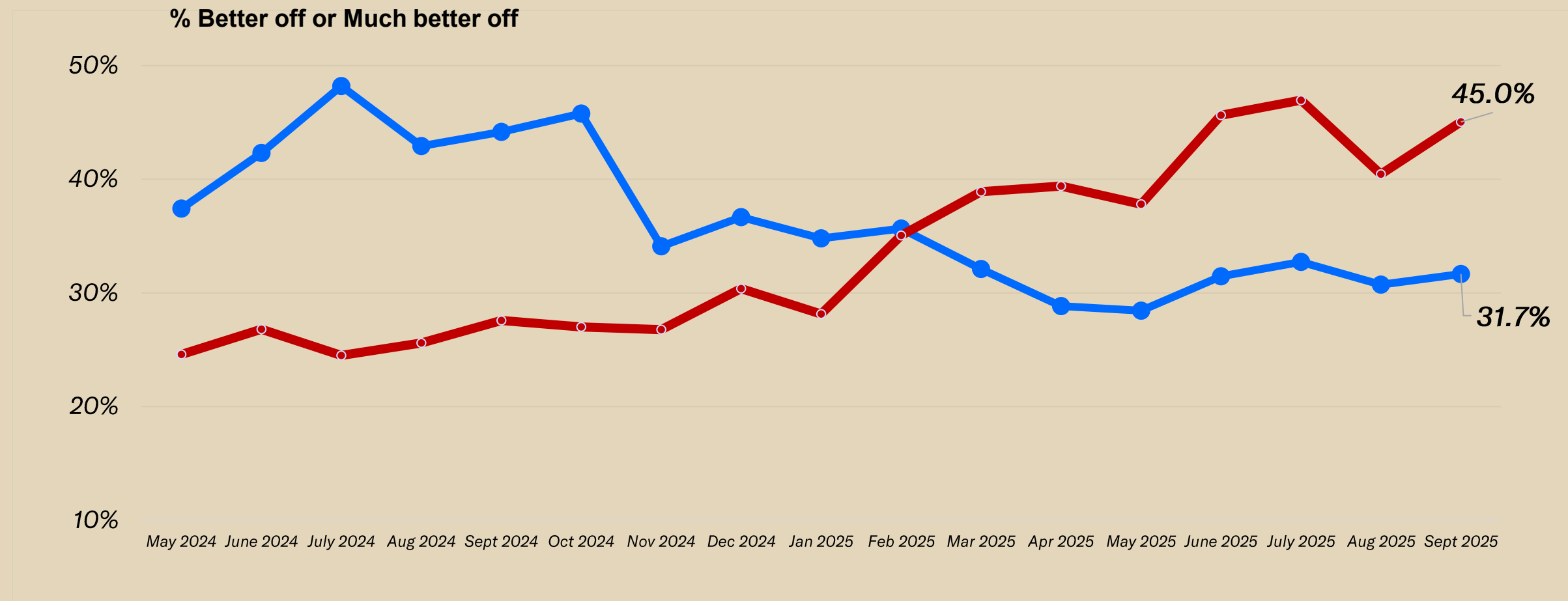
**Question:**

*Which best describes your political affiliation? (Select one)*

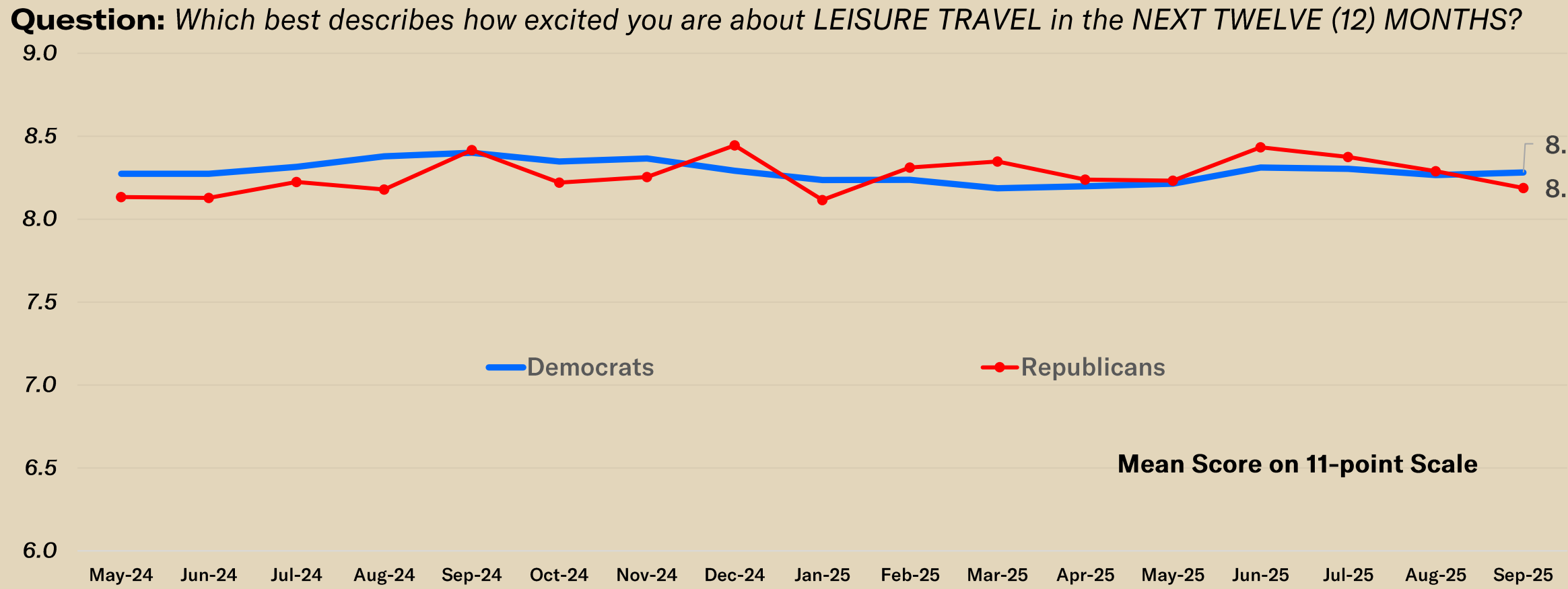


# Since last year, travelers in each party have flipped in their feelings about their current finances

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

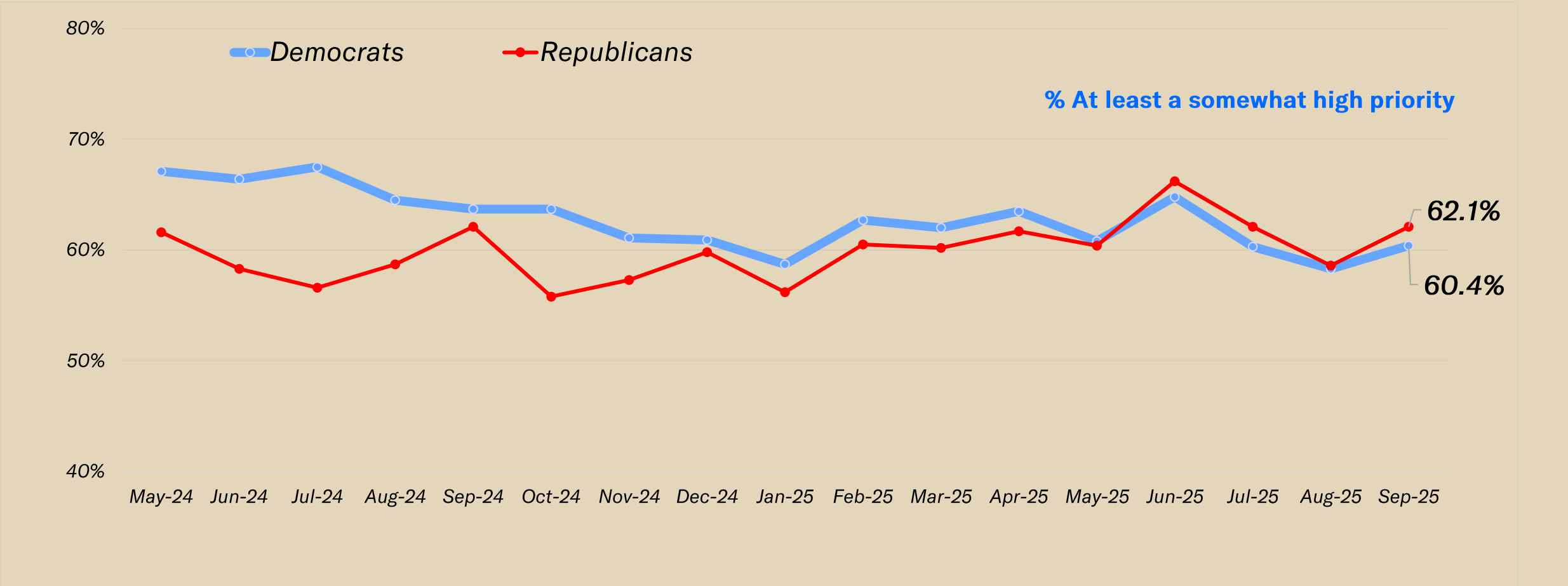


# Travelers associated with both parties show high levels of excitement to travel



# Political affiliation shows little variance in travel as a budget priority

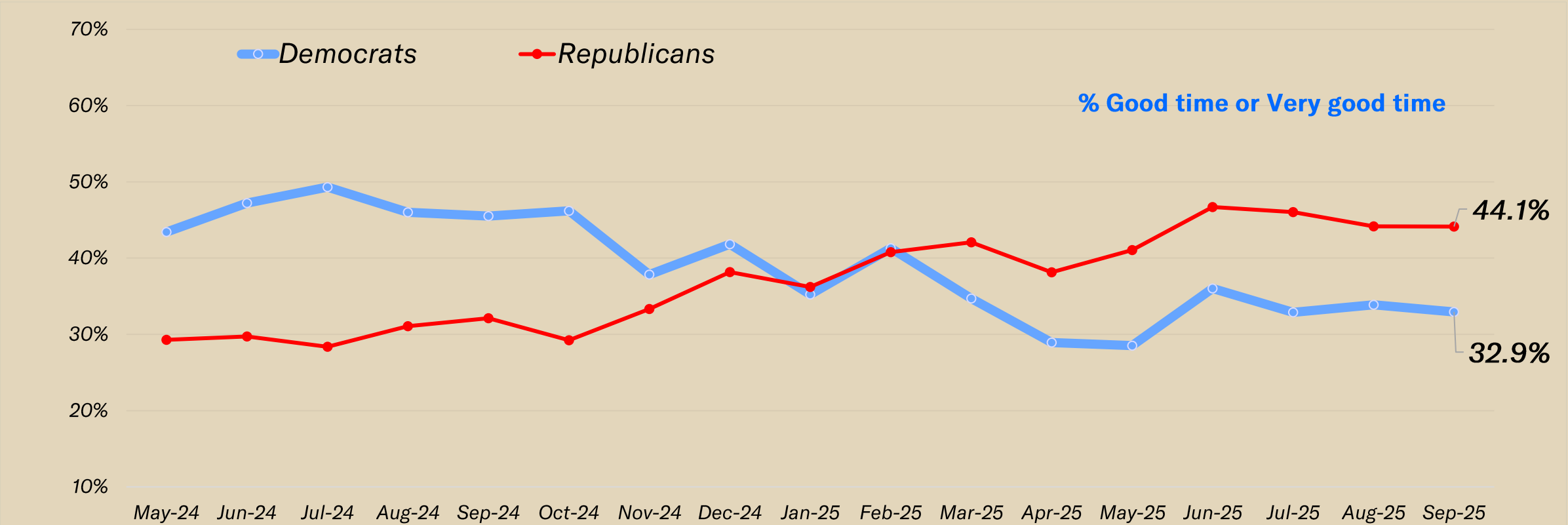
**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.





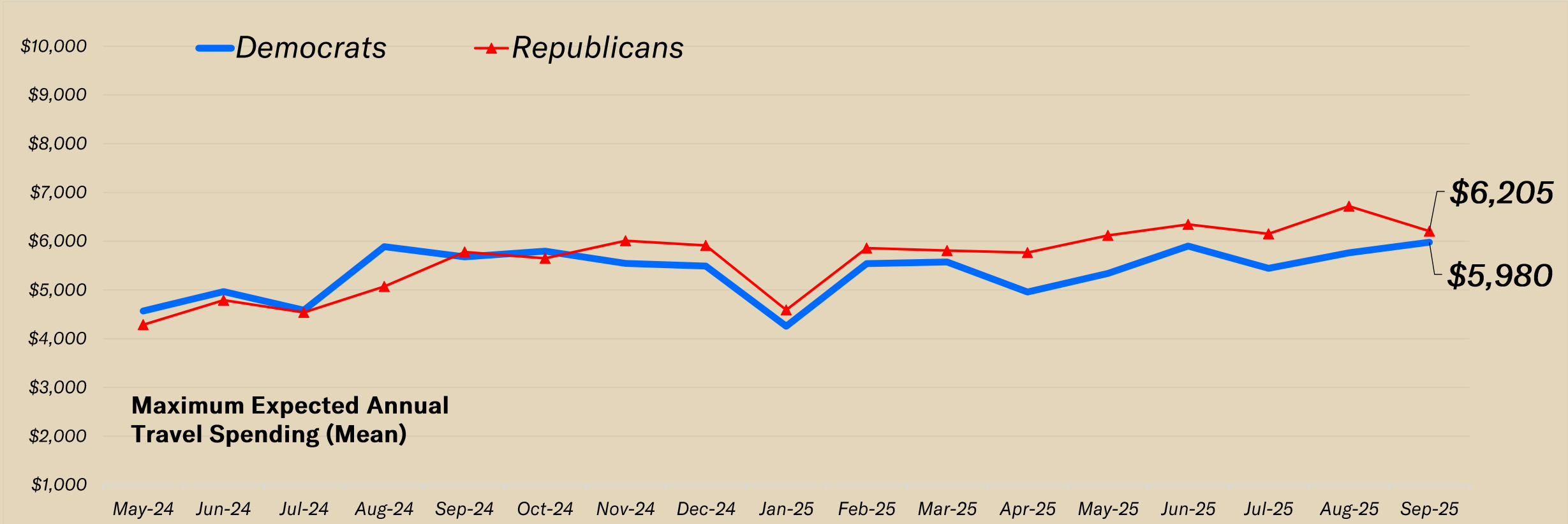
# A reversal in whether the present is a good time to spend on leisure travel

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?



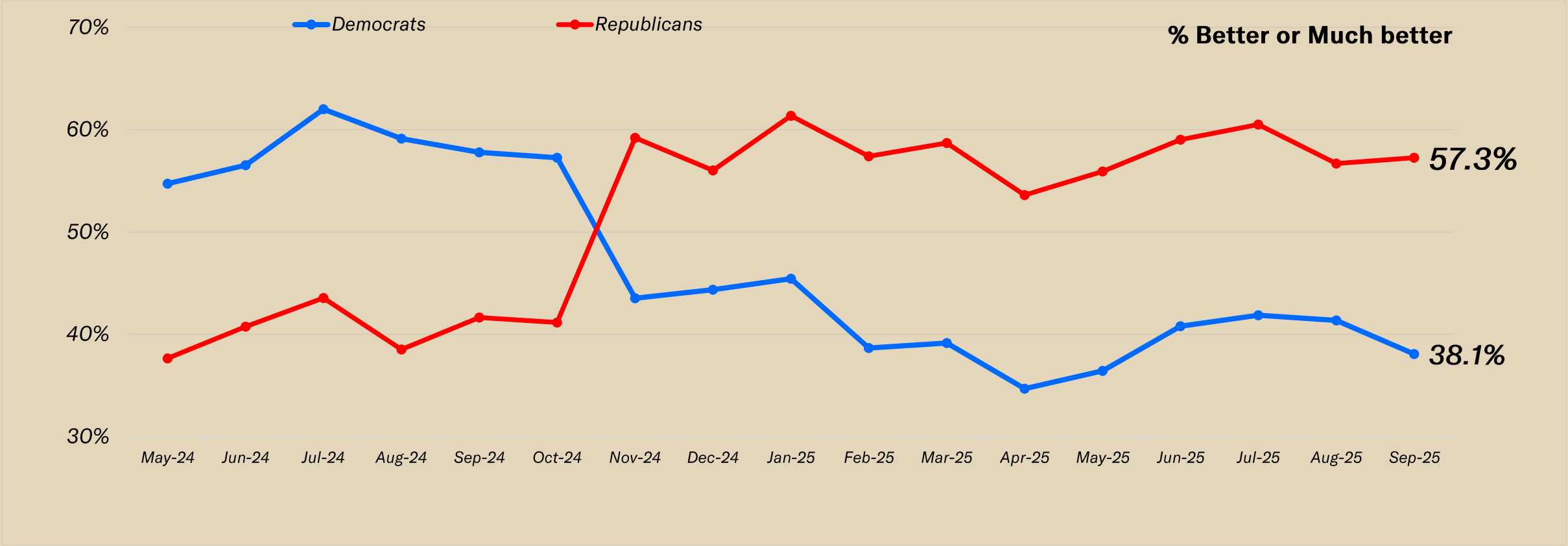
# Political affiliation doesn't seem to greatly impact travel budgets

*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? Maximum I would spend on leisure travel (next 12 months):*



# Republican travelers are now far more confident in their financial future

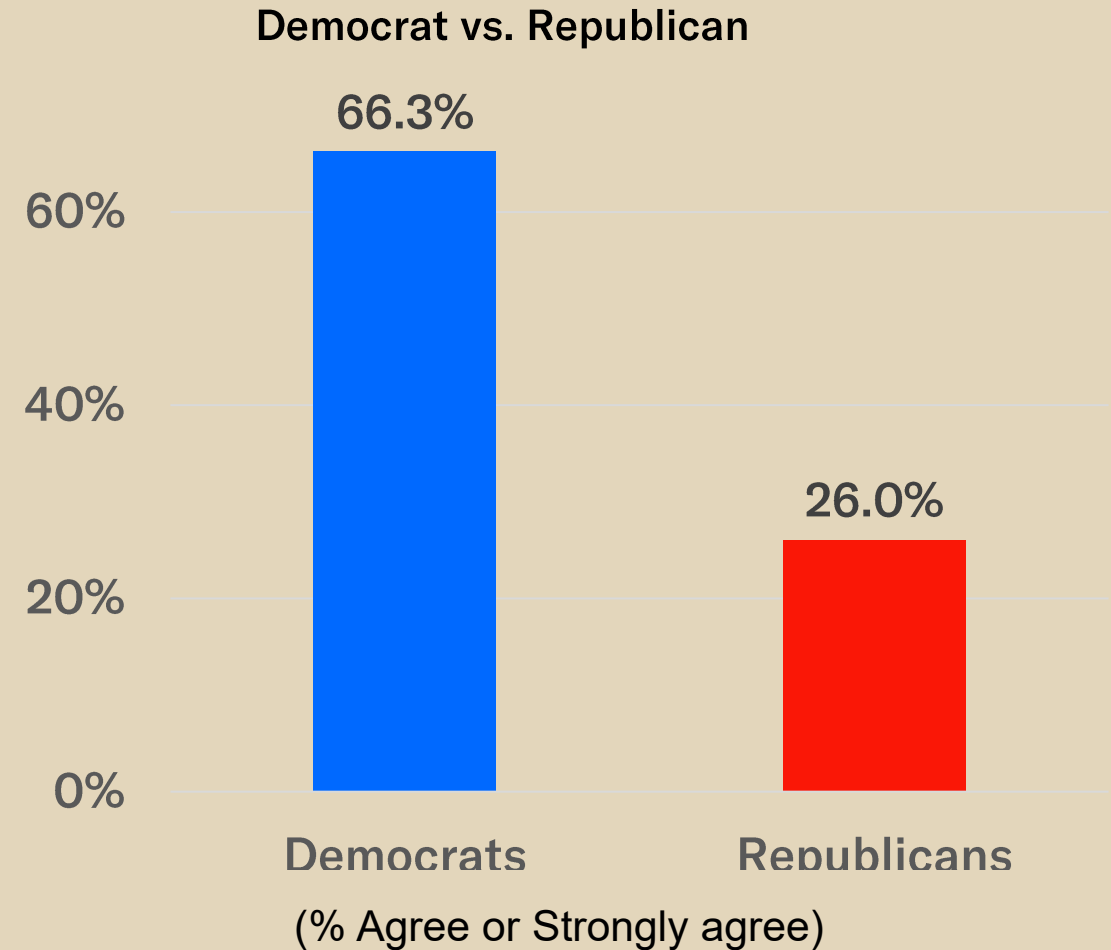
**Question:** LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



# Democrats are far more likely to expect a recession in the next 6 months

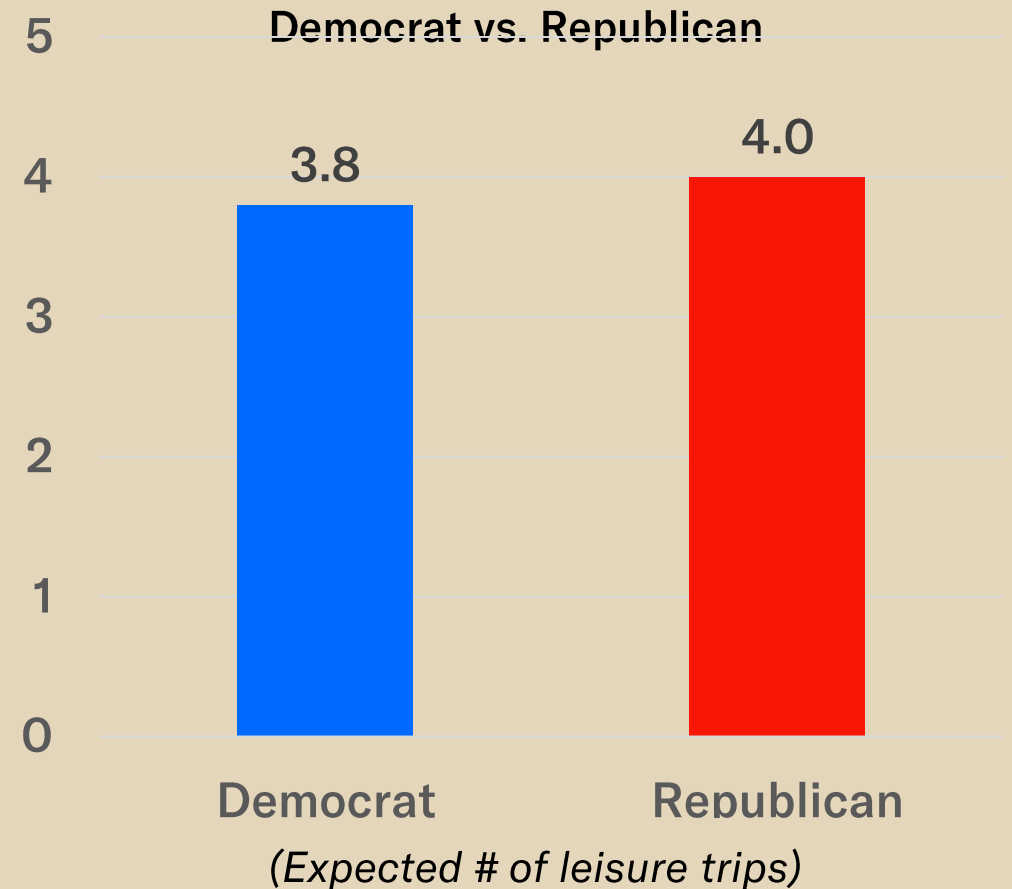
Statement Agreement:

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



# Republicans expect to take slightly more leisure trips than Democrats in the next 12 Months

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?

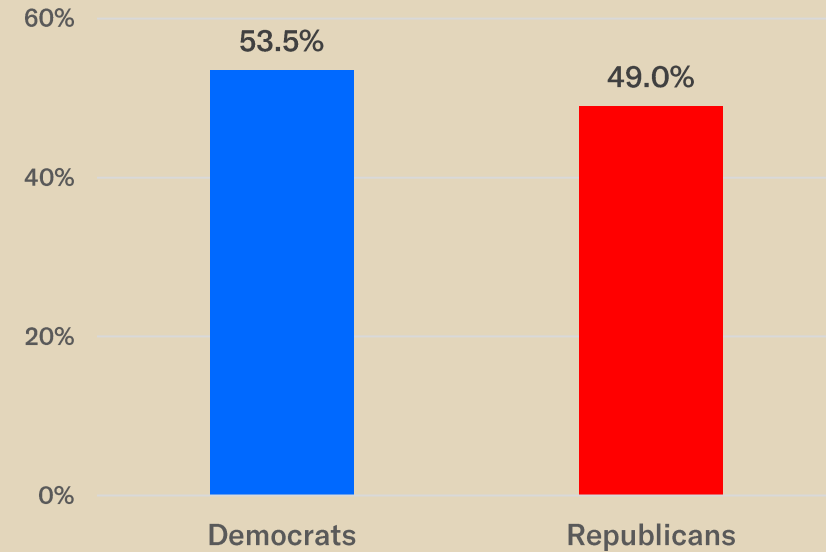




# Democrats are somewhat more likely to say they're likely to travel abroad next year

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

Democrat vs. Republican



(% Likely or Very Likely)



*Before we talk anti-luxury*

# A Look at Luxury Travelers

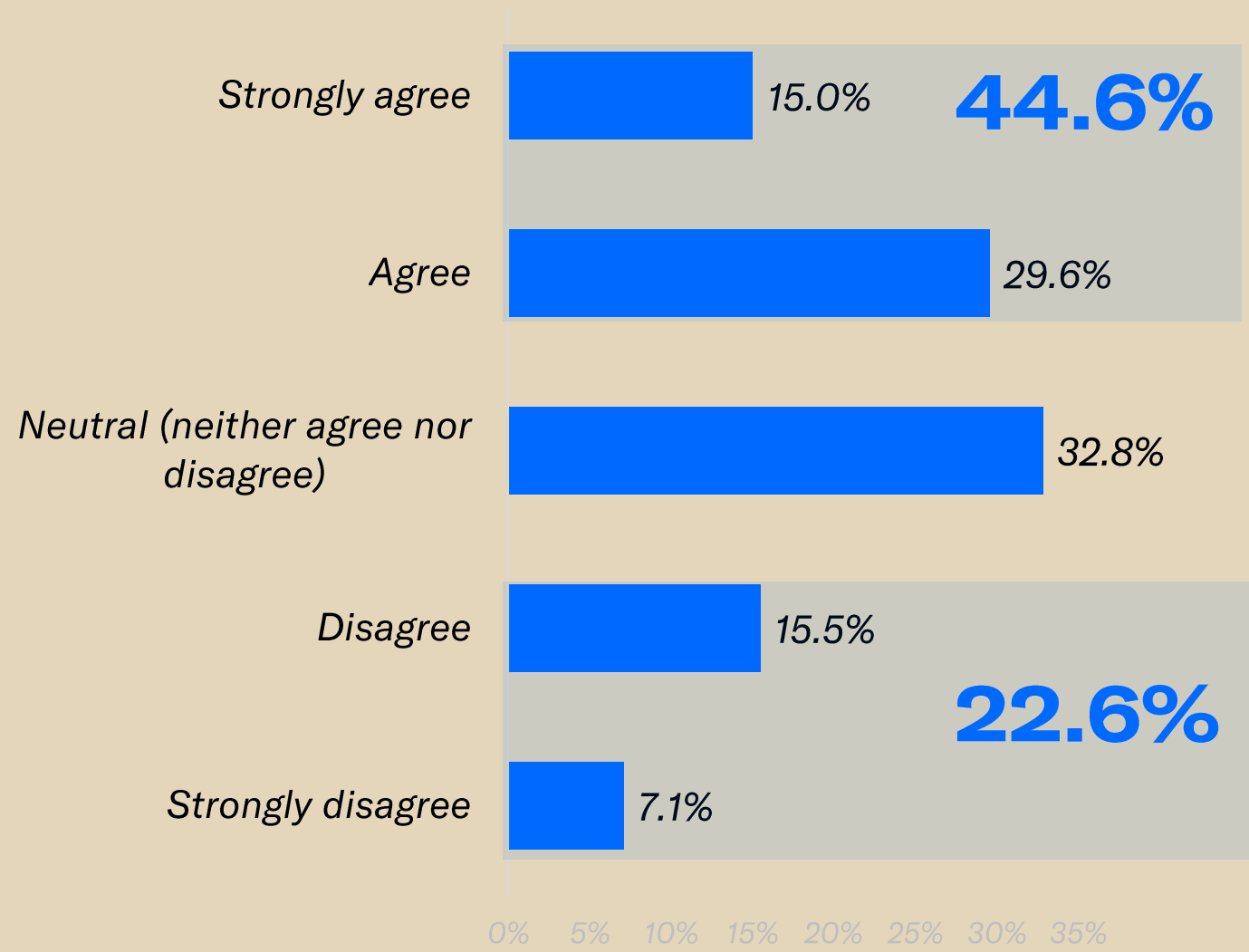




# Americans Love Luxury Travel Experiences

**Question:**  
*How much do you agree or disagree with this statement?*

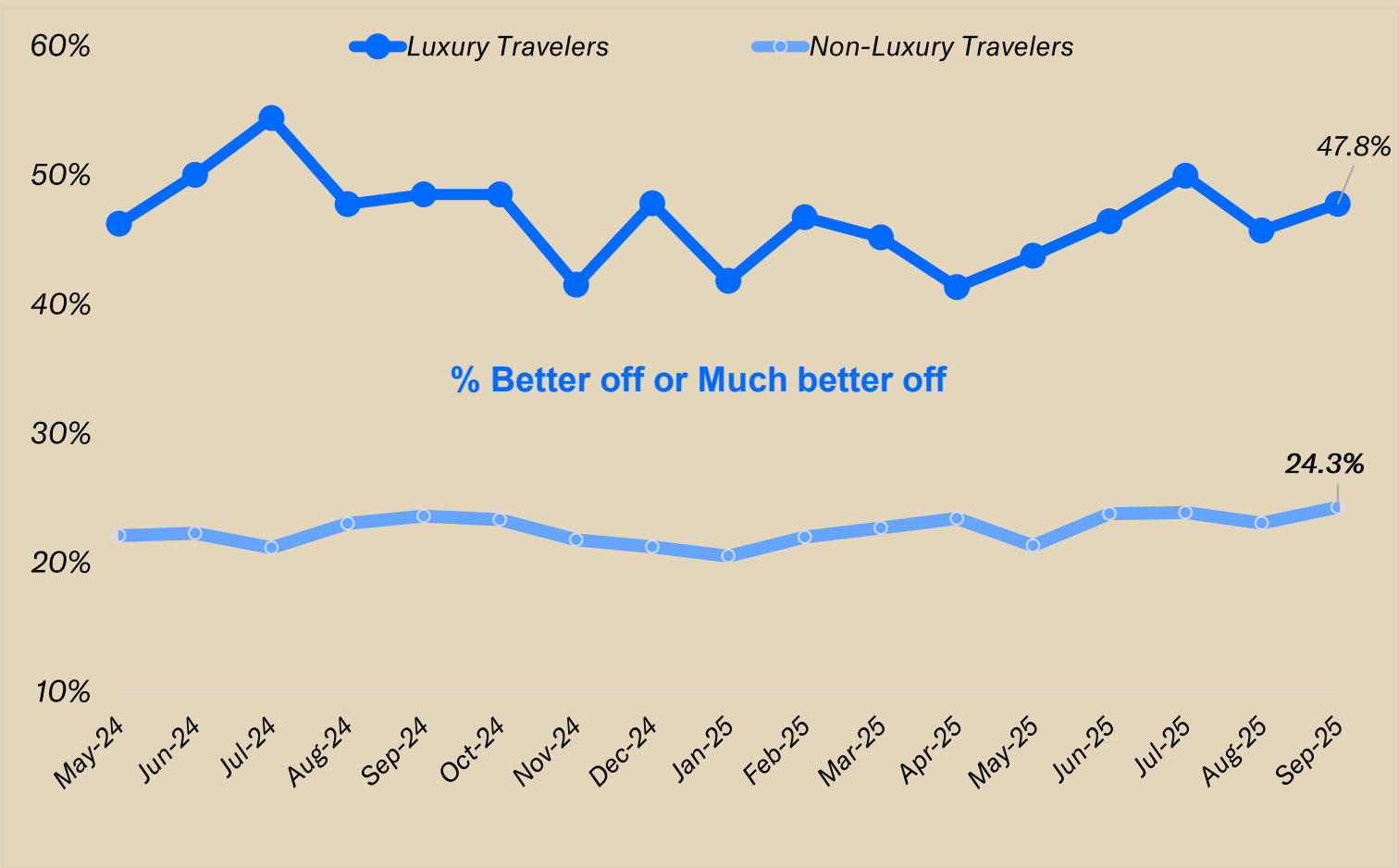
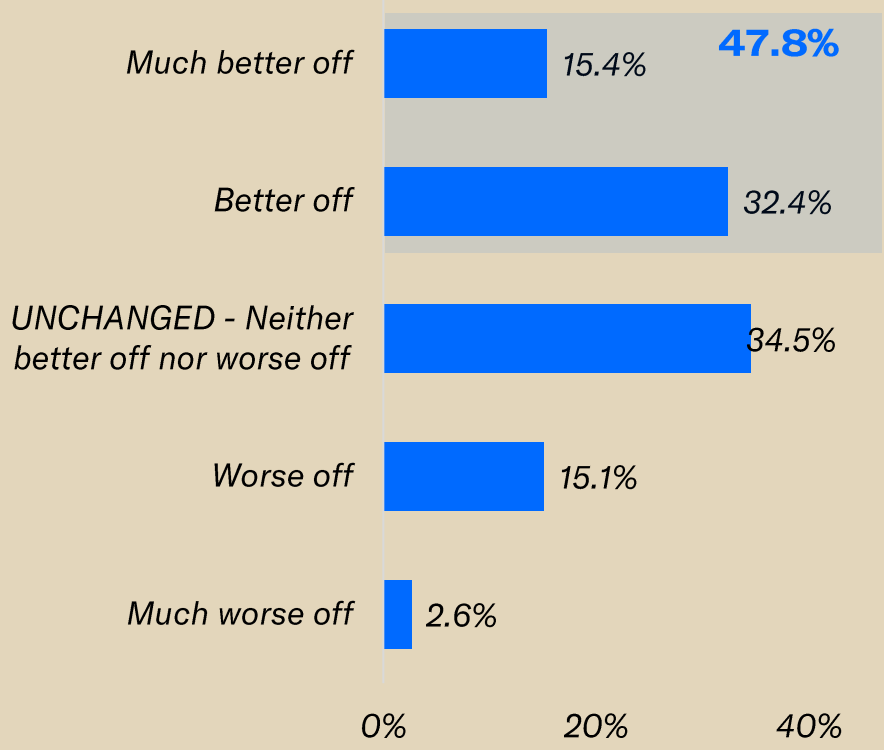
*Having luxury travel experiences is usually an important part of my leisure trips.*



# Luxury Travelers are Feeling Good Financially

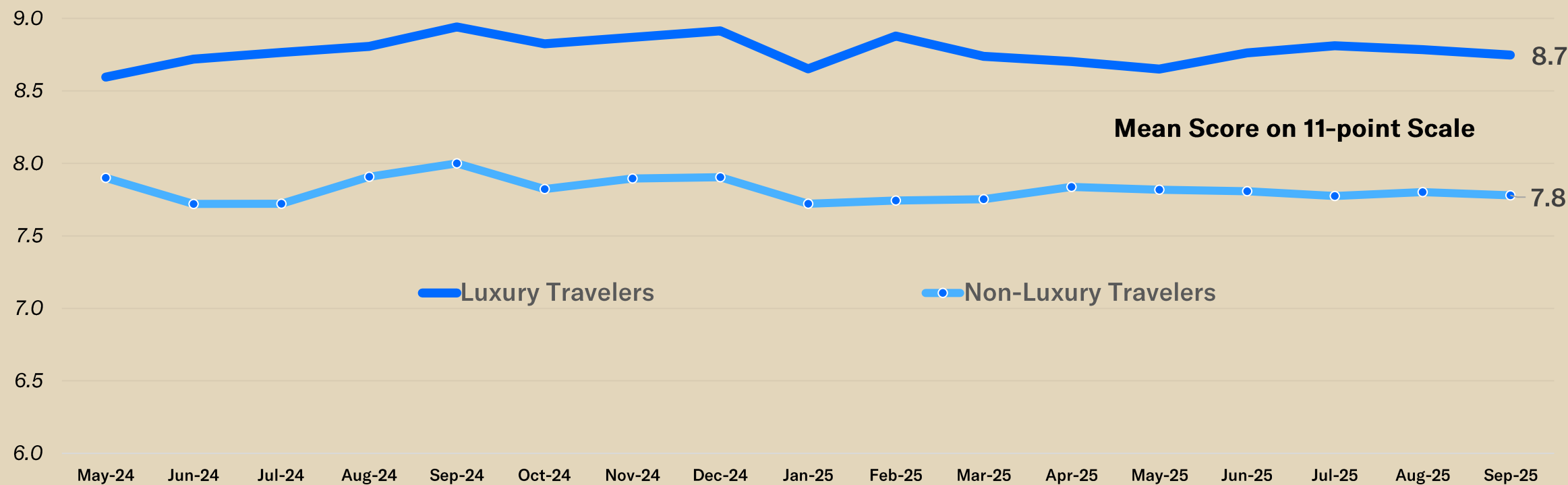
**Question:** *Would you say that you (and your household) are better off or worse off financially than you were a year ago?*

## Luxury Travelers



# Luxury Travelers Far Exceed the Norm for Excitement to Travel

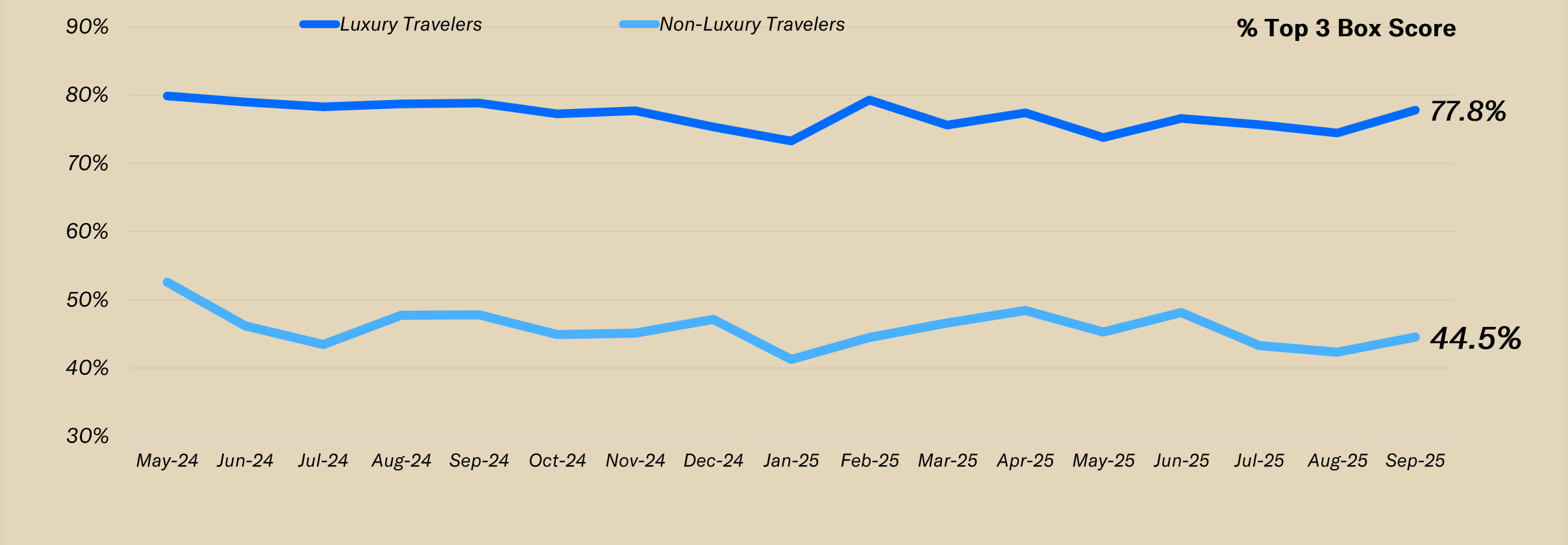
**Question:** Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?





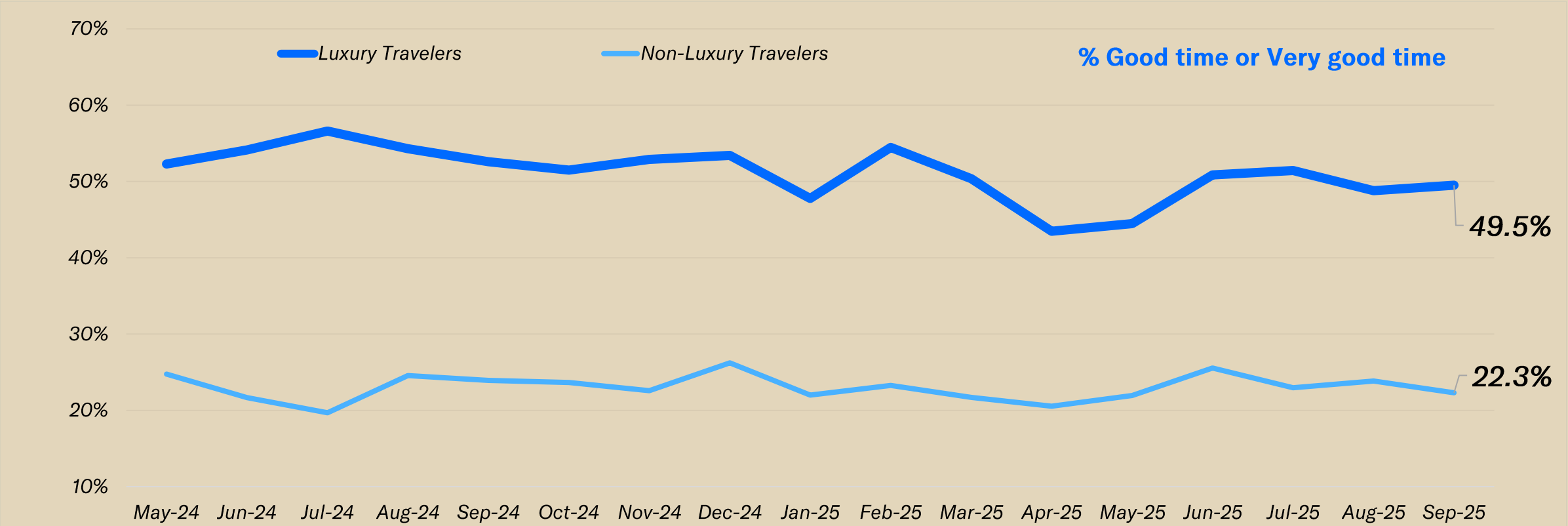
# Luxury Travelers are Budgeting for Travel

**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.*



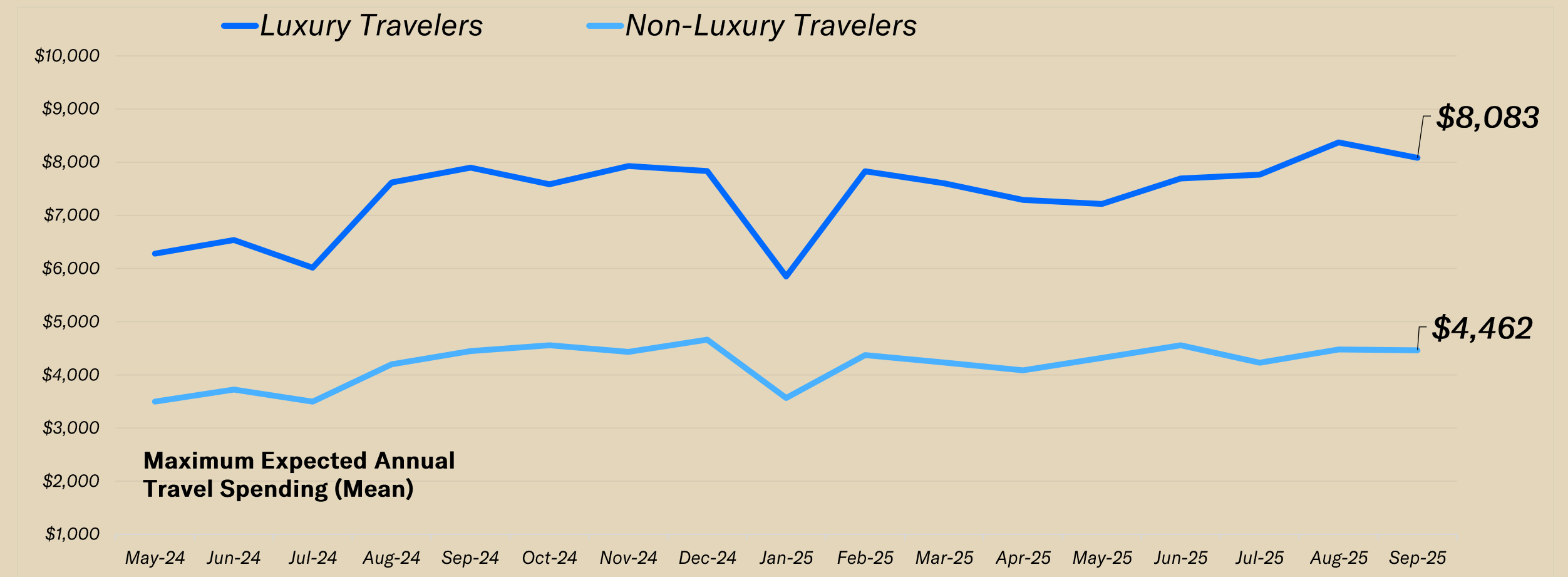
# Luxury Travelers are Ready to Spend on Travel

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?



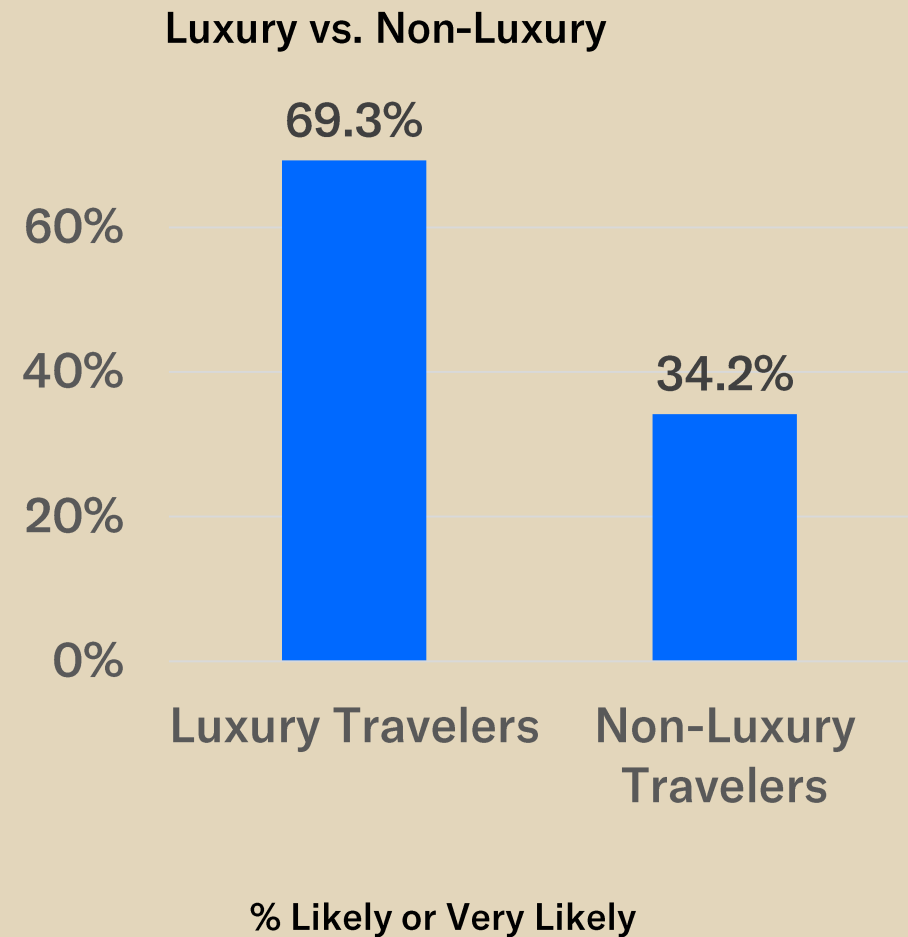
# Luxury Travelers' Budgets are Nearly Double Others

**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):

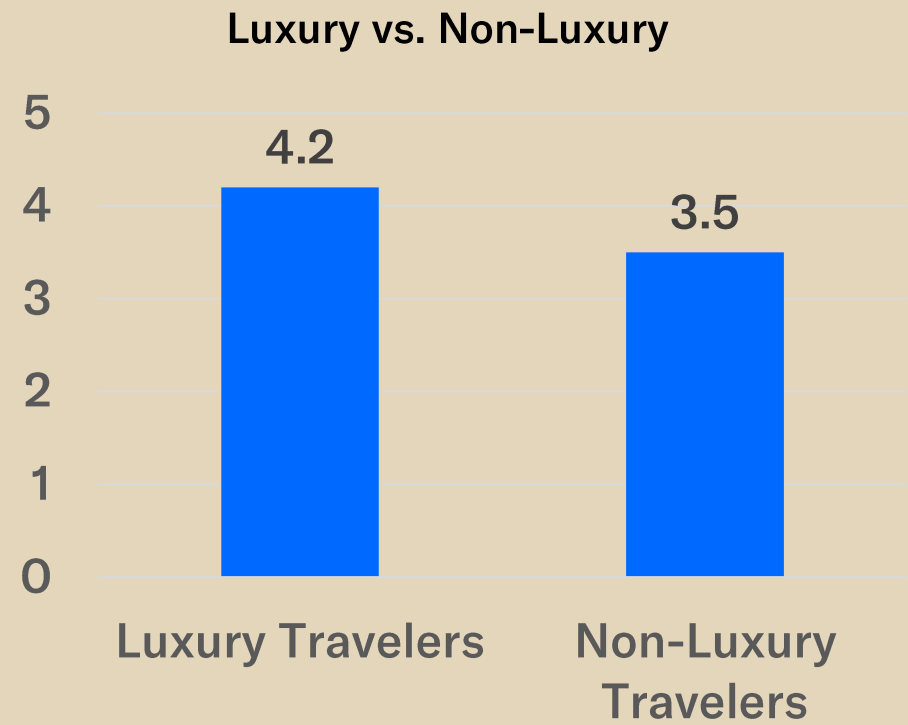


# Luxury Travelers are More Likelihood to Travel Internationally

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



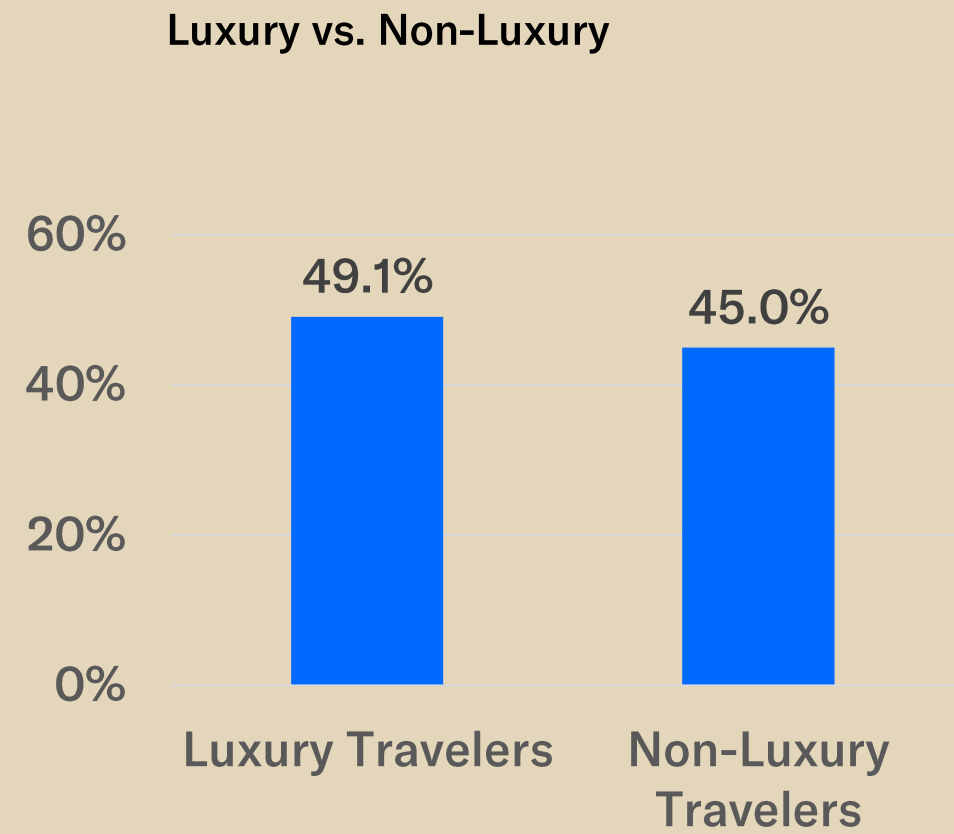
# Luxury Travelers Expect to Take More Trips in the Next 12 Months



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?

# Luxury Travelers Share Similar Recessionary Concerns to Other Travelers

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



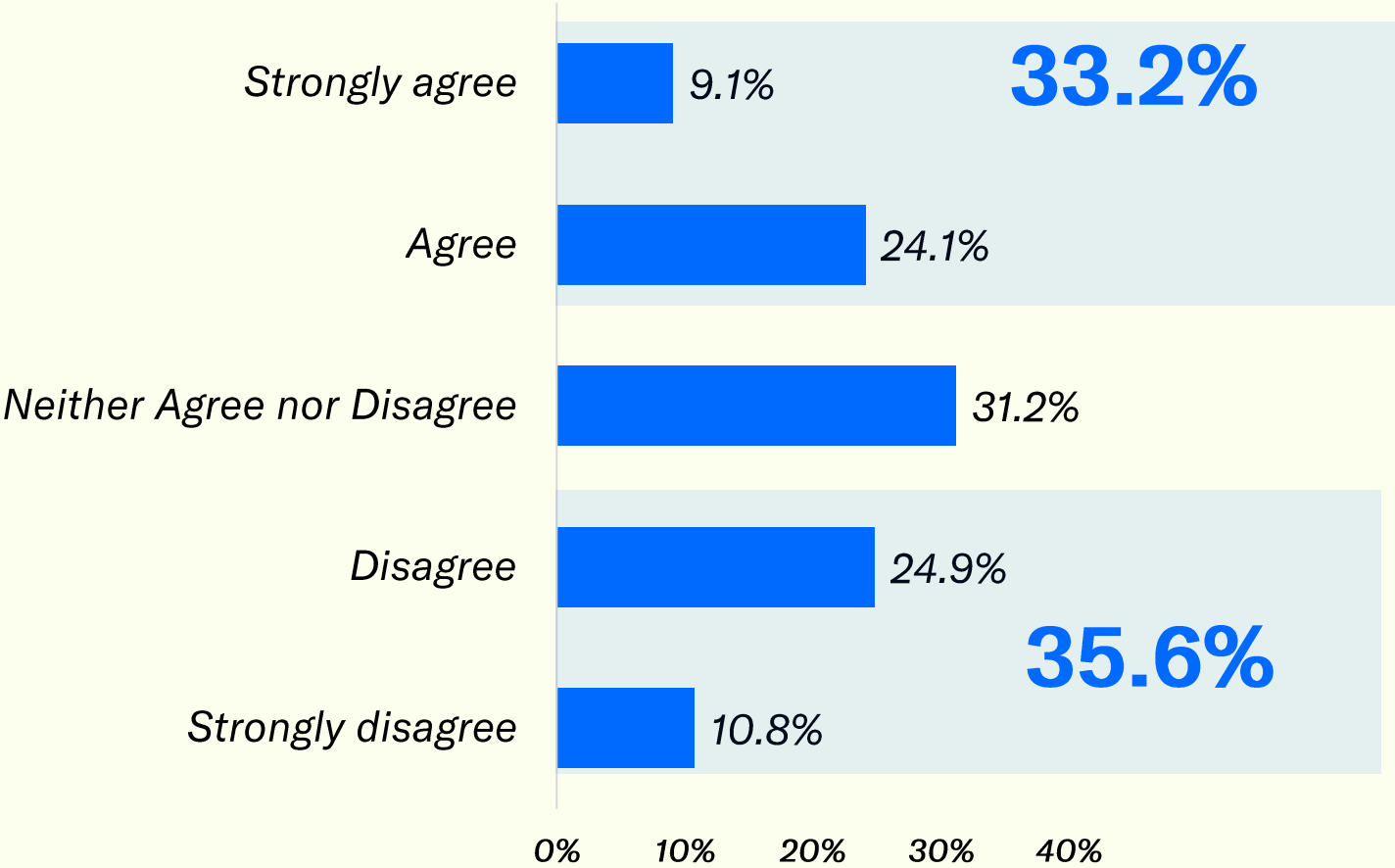


# Anti-Luxury Travel

The idea of anti-luxury travel has emerged as a counterpoint to traditional luxury travel. Instead of being defined by opulence, exclusivity, and high price points, anti-luxury emphasizes authenticity, meaning, and personal value.

# Luxury and indulgence still matters

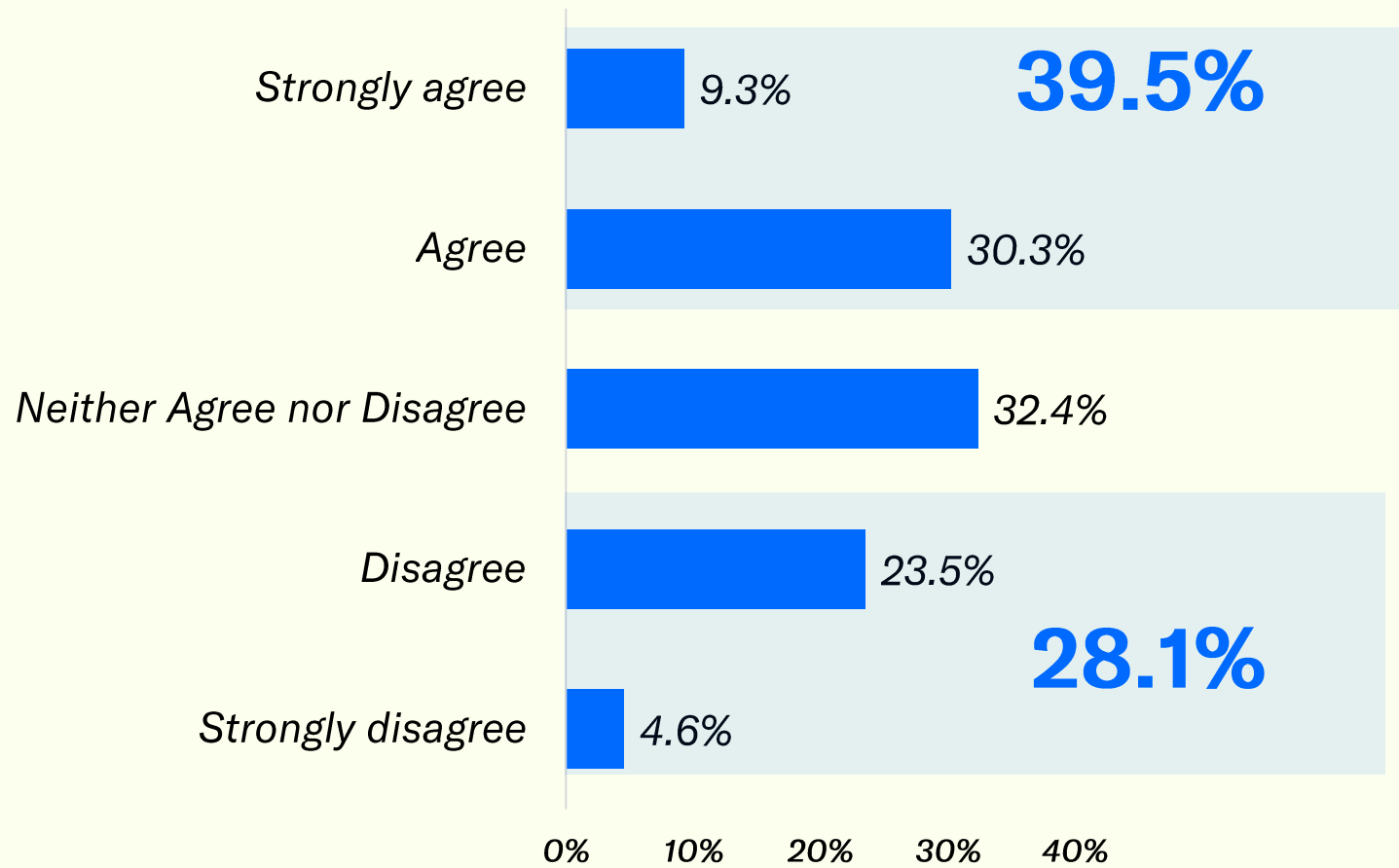
**Question:**  
*When I travel, I generally prefer luxury and indulgence over simplicity and authenticity.*



# For Many Travelers, However, Indulgence Doesn't Add Meaning.

## Question:

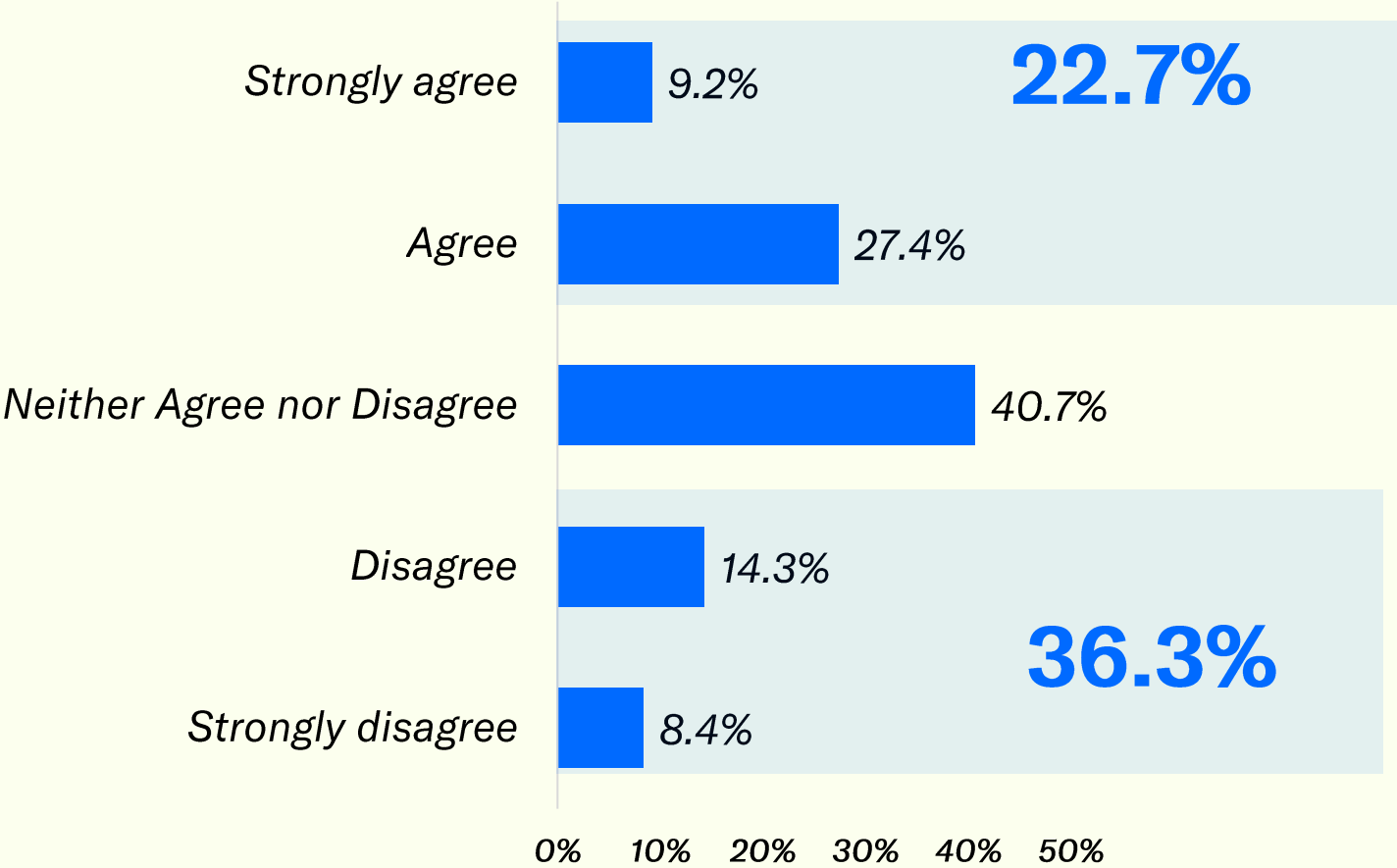
*I feel more satisfied when I travel simply, even if it means giving up comfort or convenience.*





# Social and Environmental Responsibility in Travel Matters to Just Under 1-in-4 Travelers

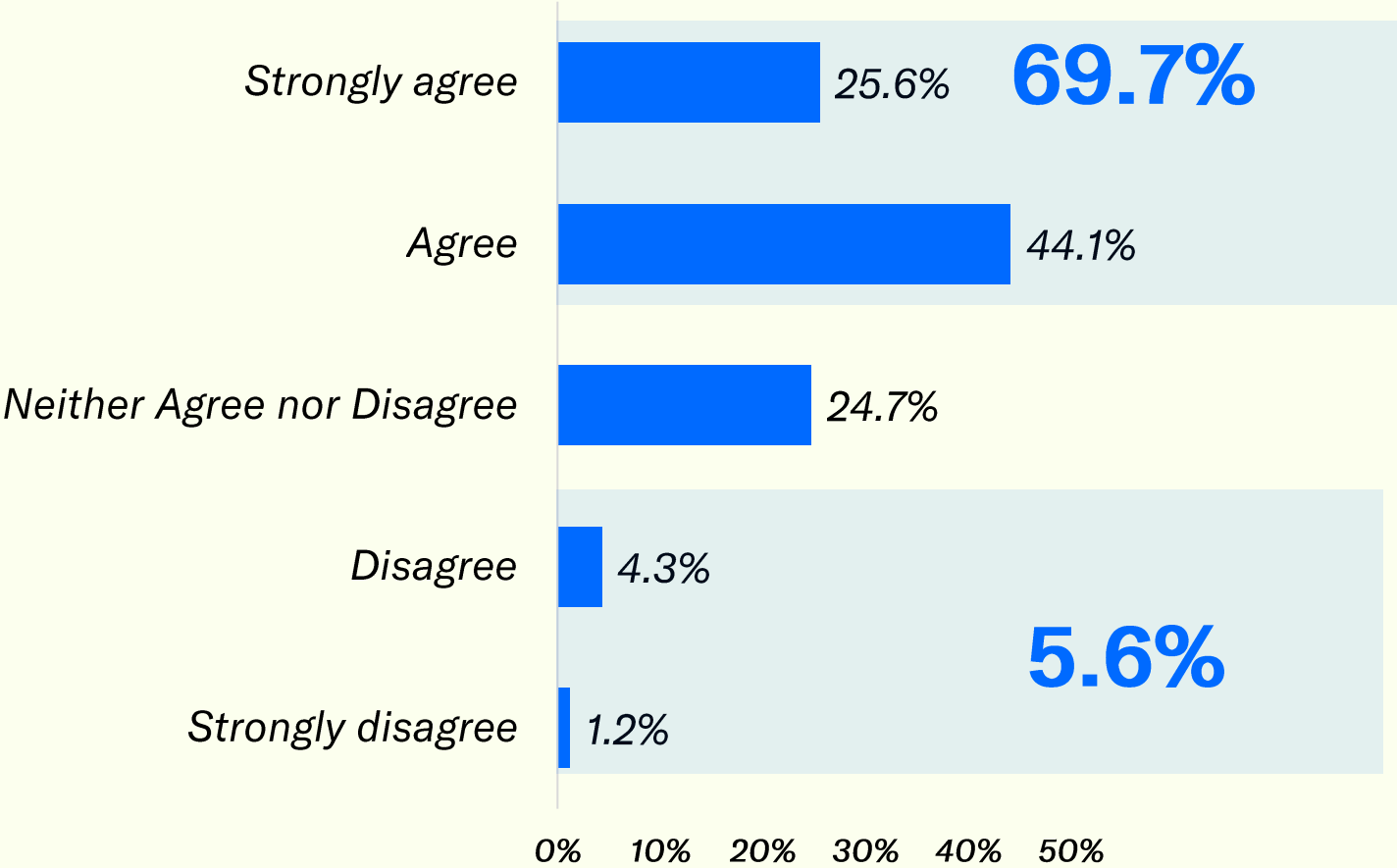
**Question:**  
*It is important that my travel choices reflect environmental and social responsibility.*



# Freedom and Authenticity Matter to Most American Travelers

## Question:

*For me, the real luxury in travel is time, freedom, or authentic experiences — not expensive amenities.*

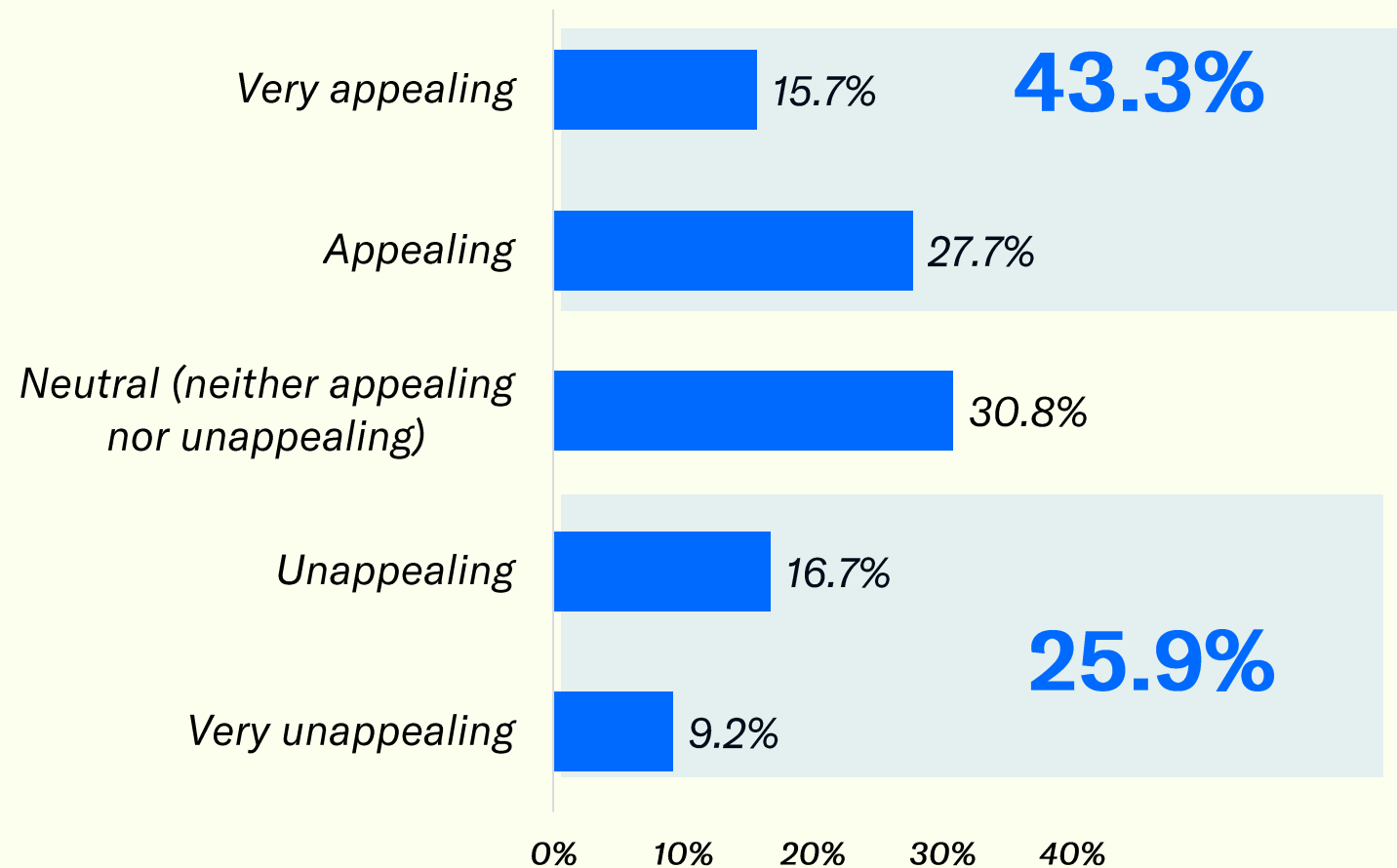


# Anti-Luxury Travel is a Popular Concept With American Travelers

## Question:

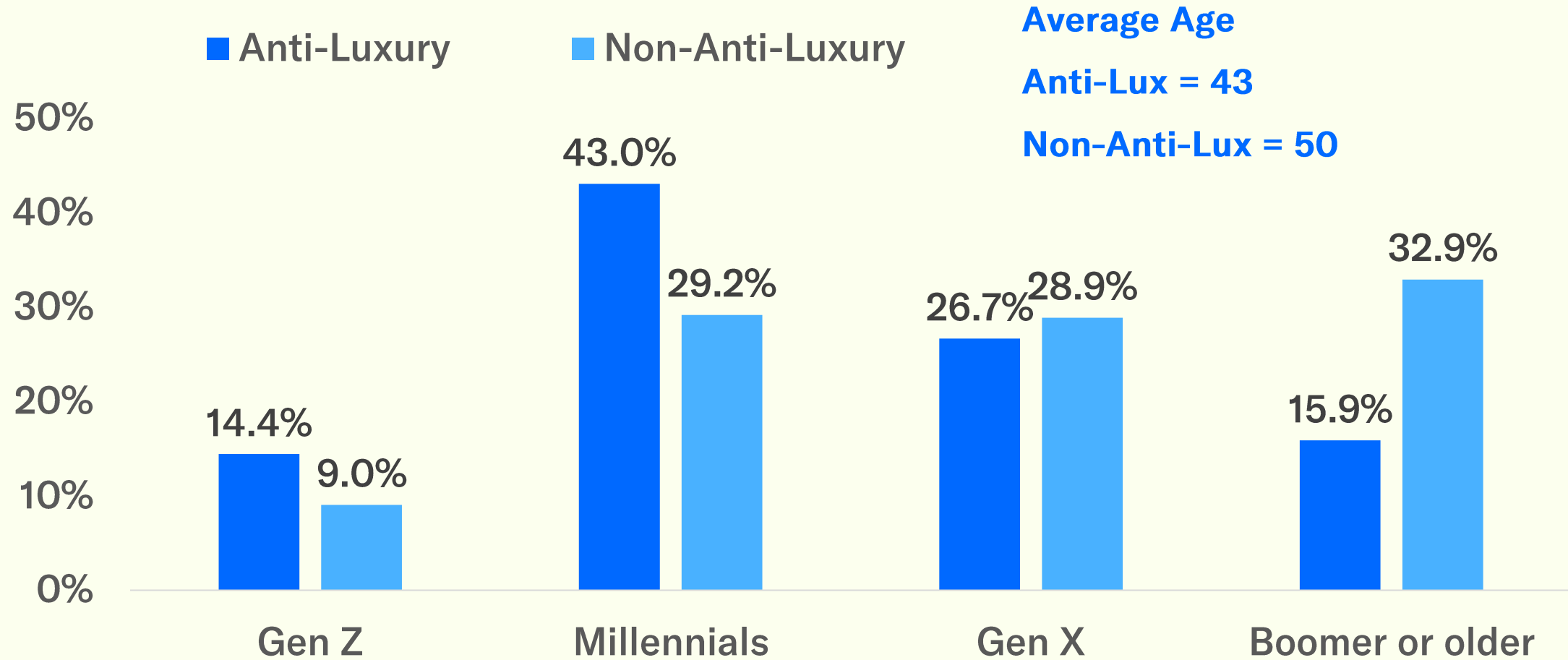
*The idea of anti-luxury travel has emerged as a counterpoint to traditional luxury travel. Instead of being defined by opulence, exclusivity, and high price points, anti-luxury emphasizes authenticity, meaning, and personal value.*

*How appealing do you find the concept of anti-luxury travel?*

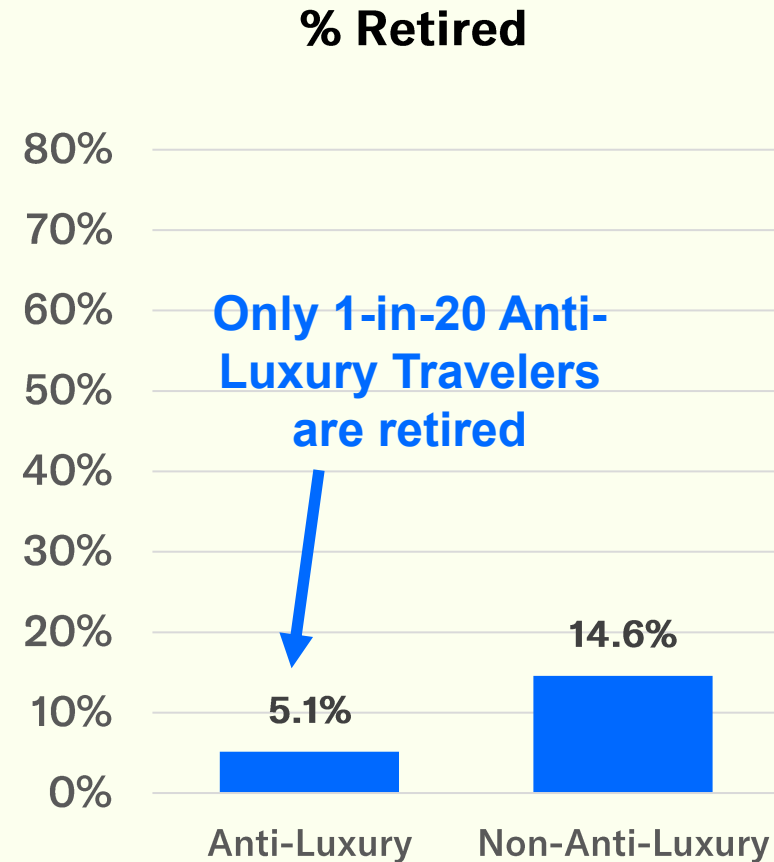
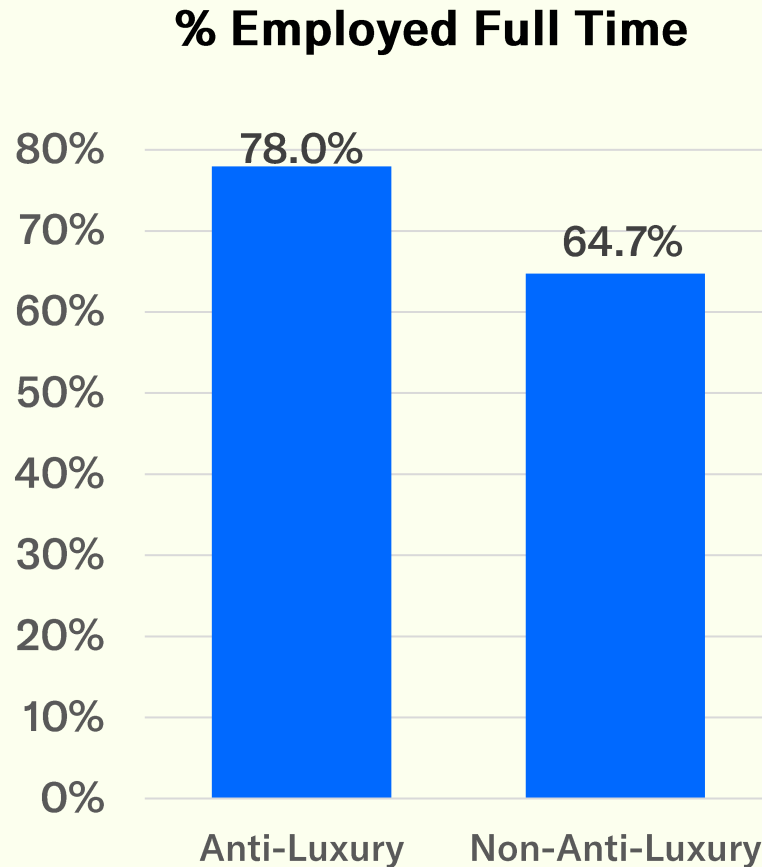




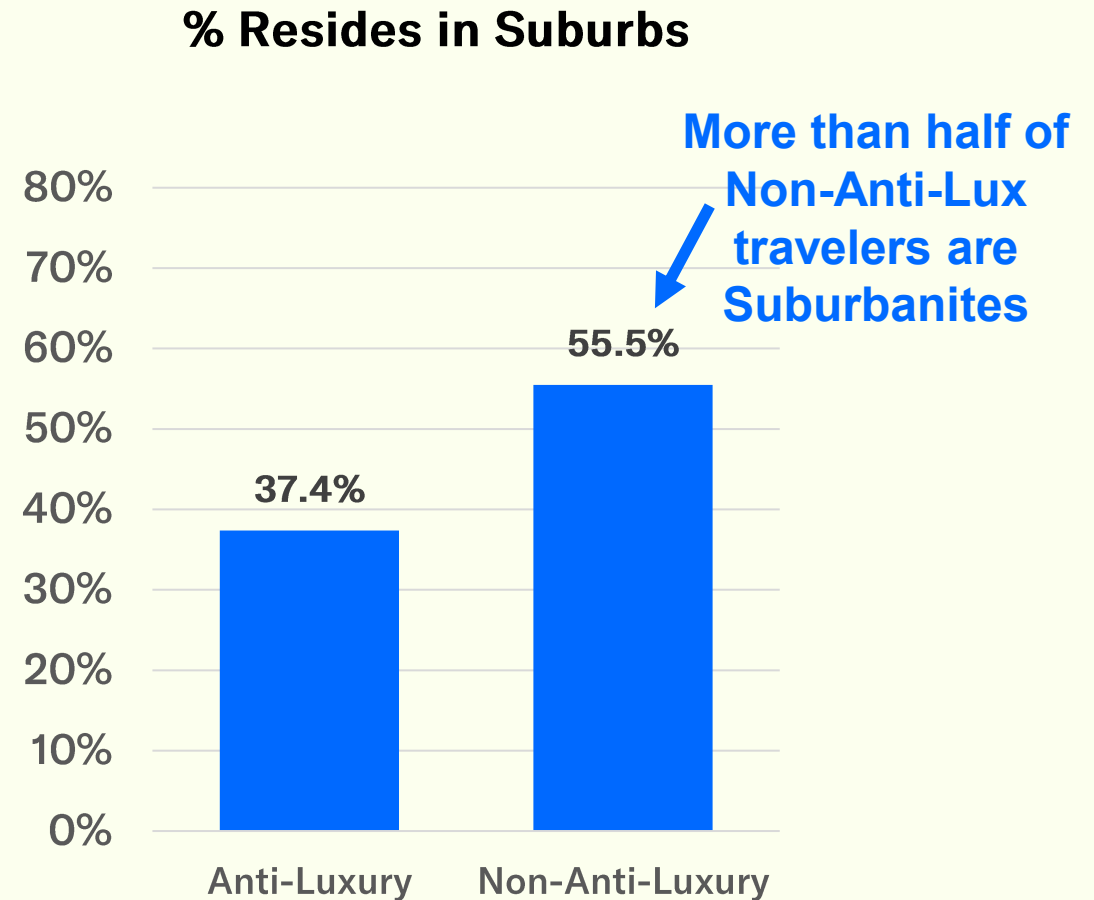
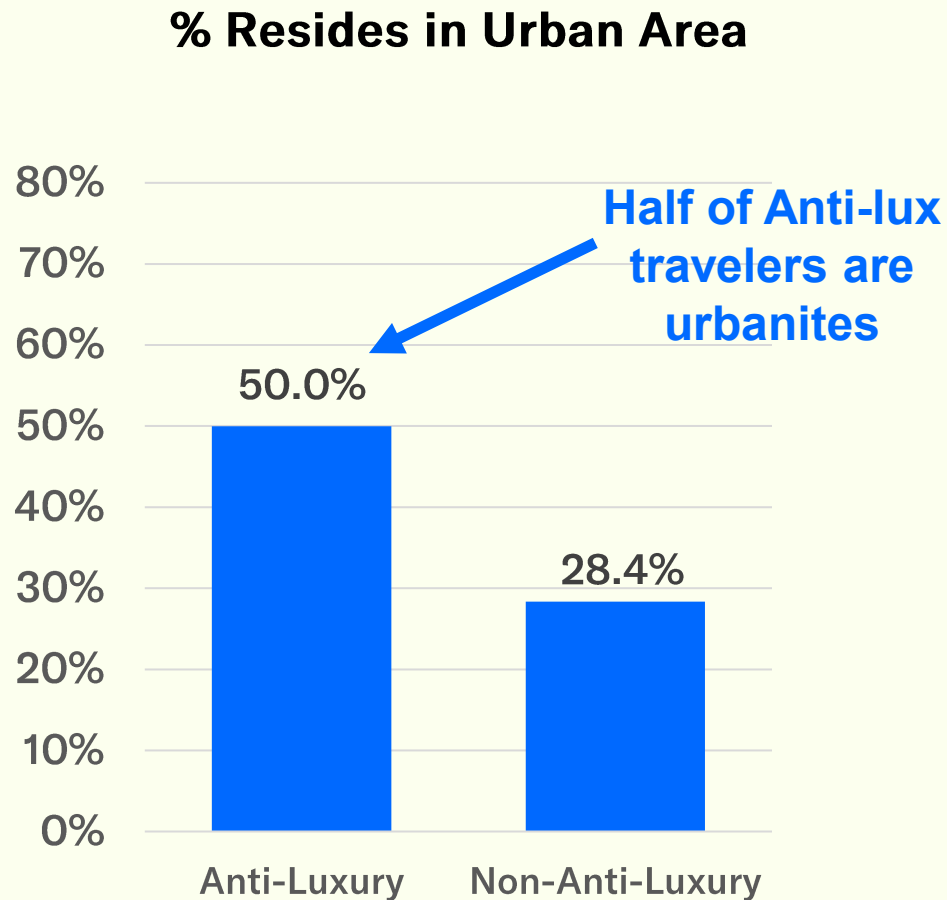
# Anti-Luxury Travelers Skew Sharply Younger



# Anti-Luxury Travelers Are Typically Employed Full-time, With Few Being Retired

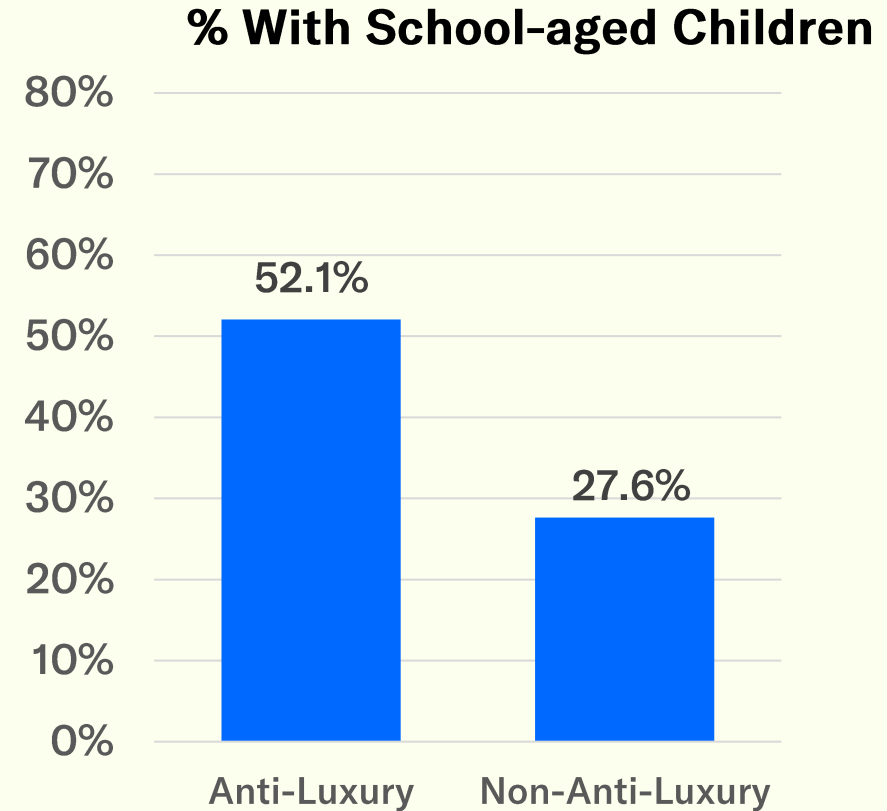


# Anti-Luxury Travelers Tend to be Urbanites, Non-Anti-Lux Travelers Suburbanites



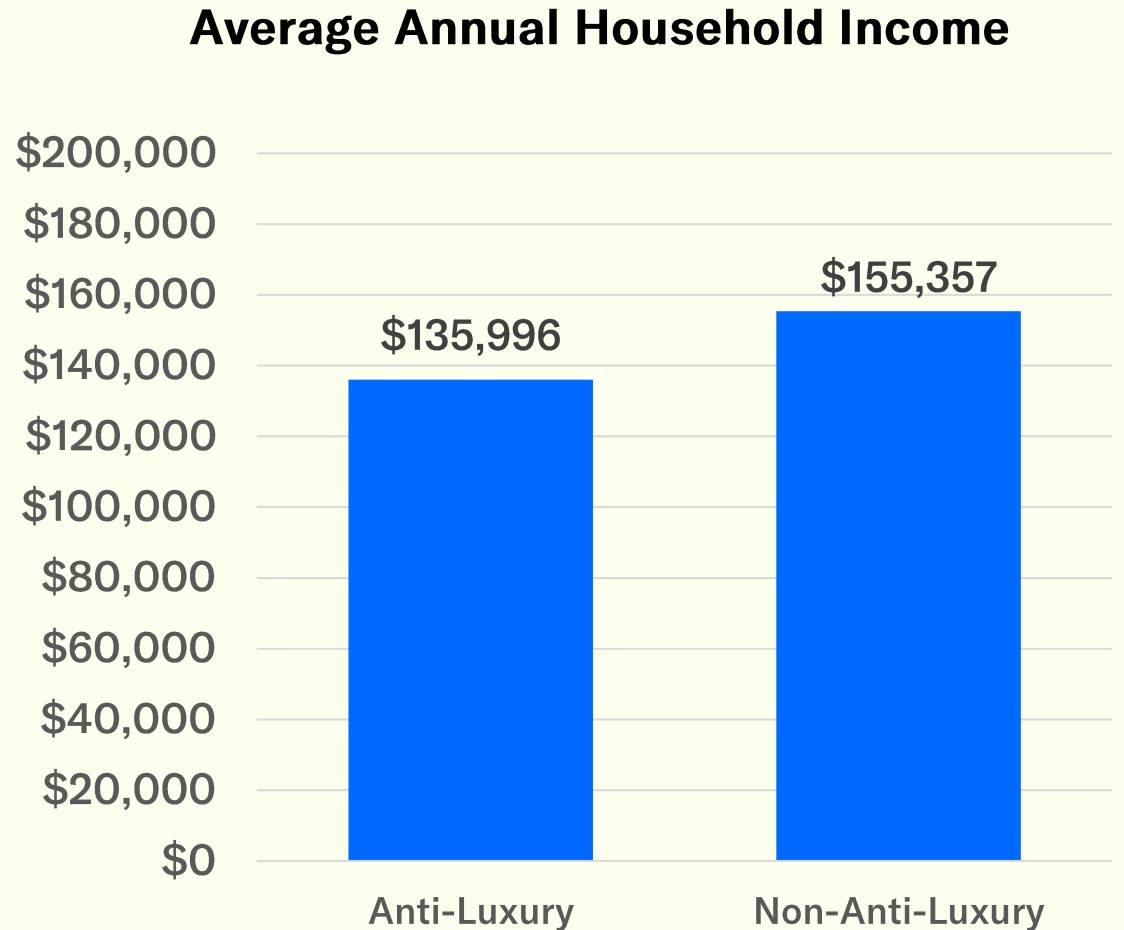
# Most Anti-Luxury Travelers Have Kids

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



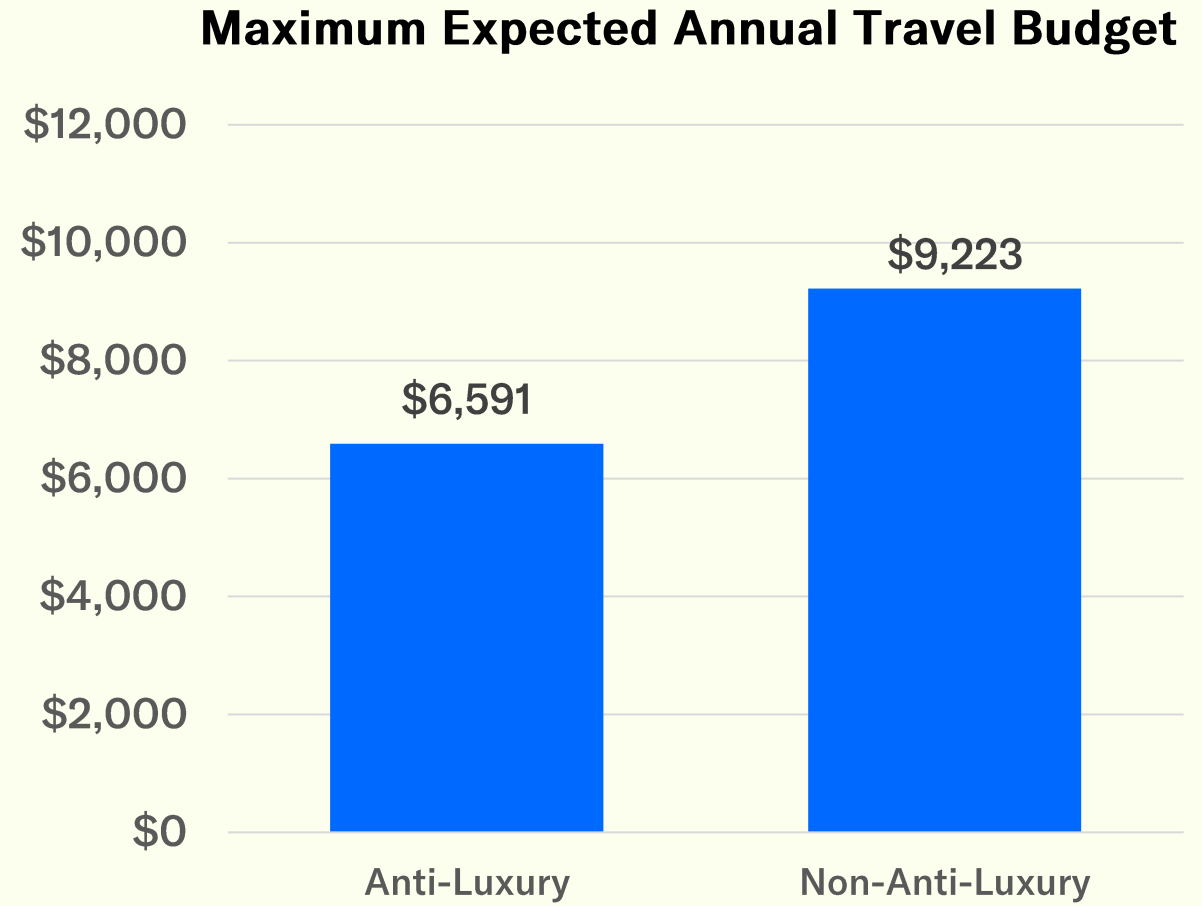
# Anti-Luxury Travelers Have Lower Household Incomes than Non

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



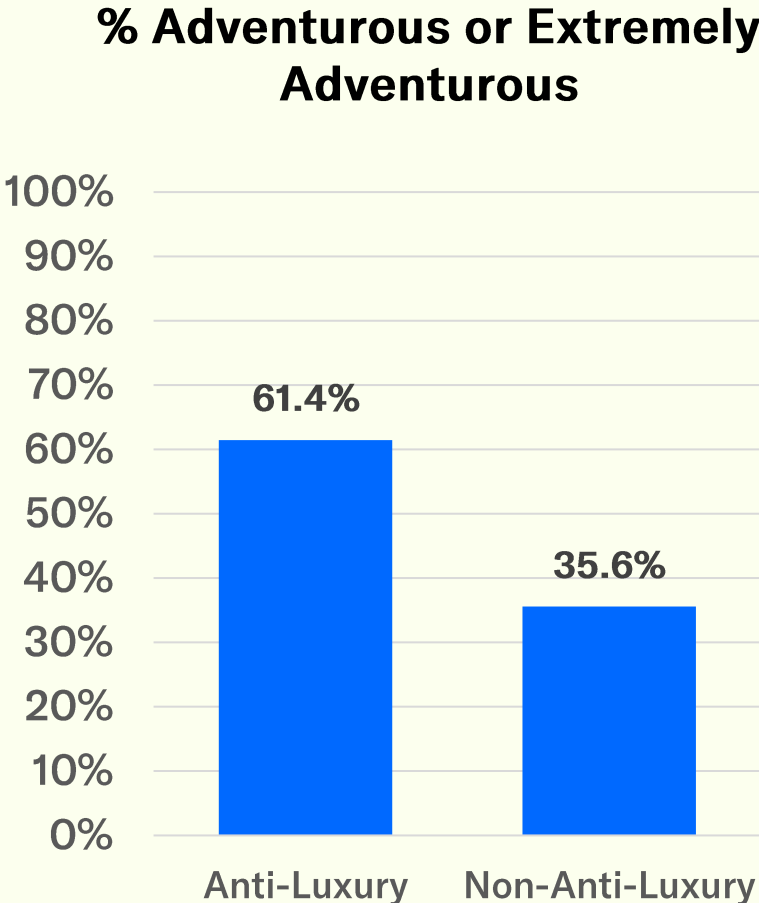
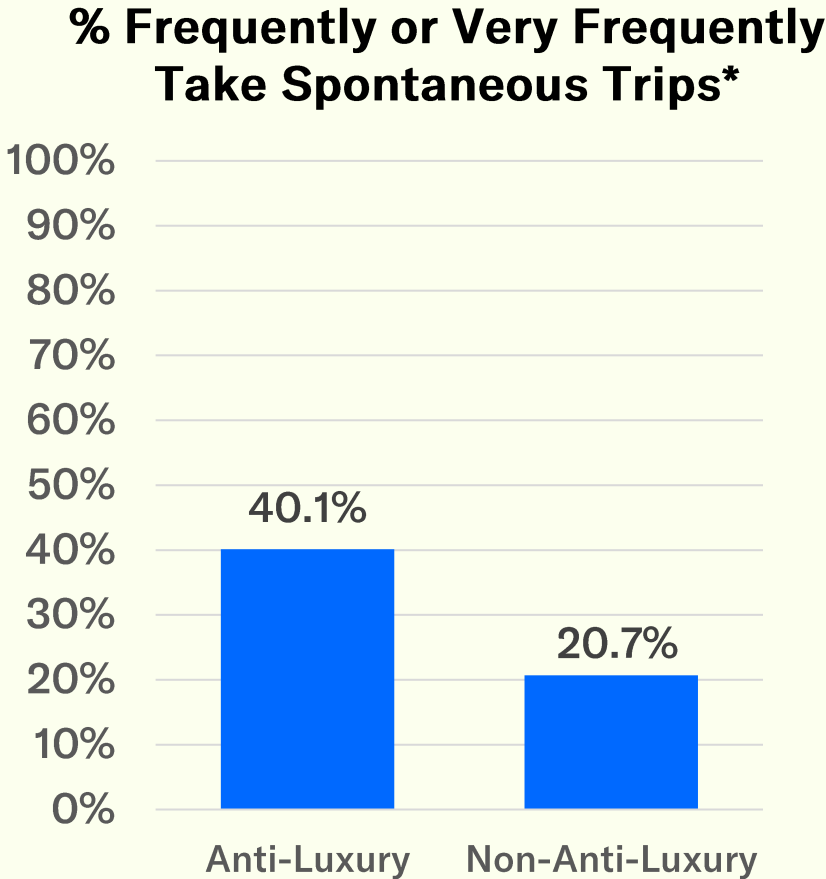
# Anti-Luxury Travelers have Smaller Travel Budgets compared to Non

**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?**





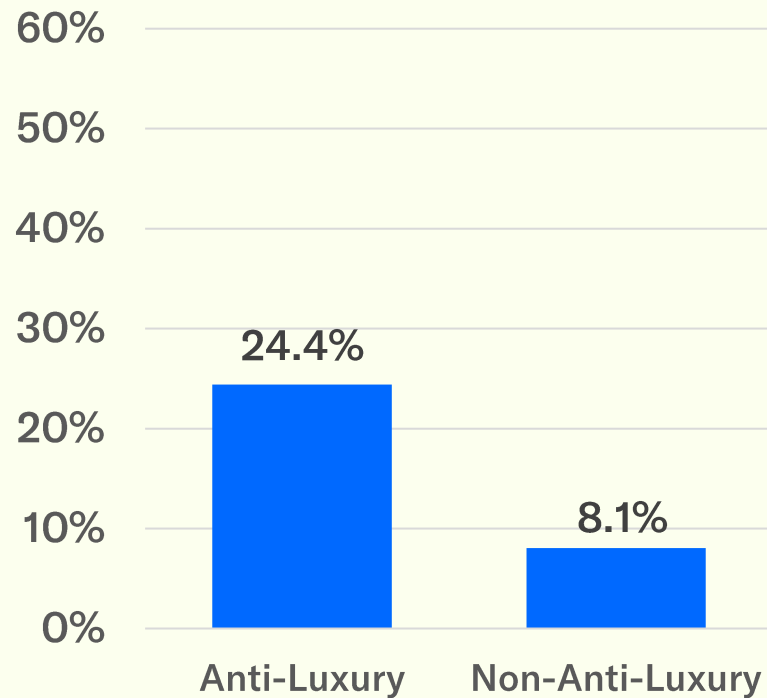
# Anti-Luxury Travelers are Adventurous and Spontaneous in Their Travels



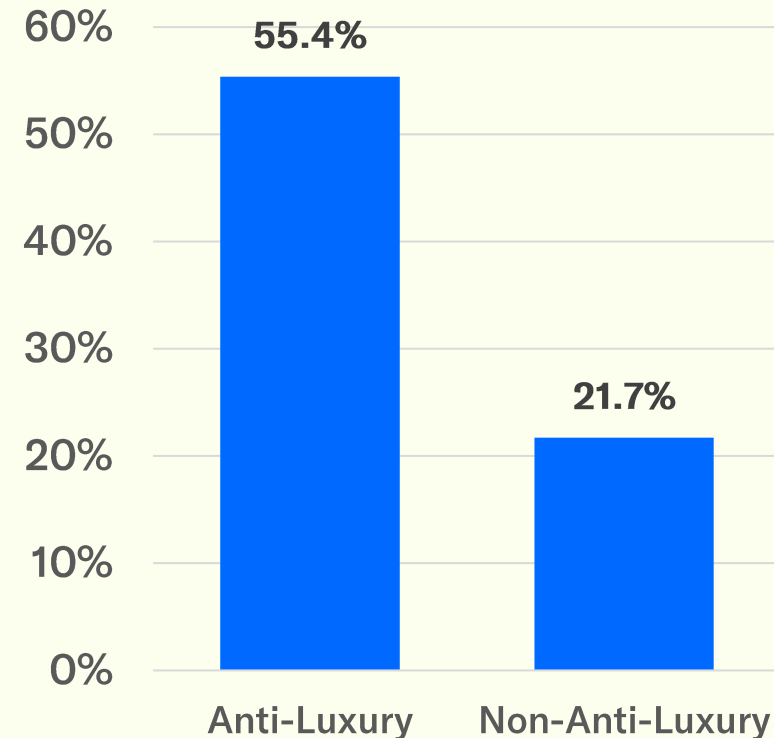
\*trips sparked by impulse which begin soon after the idea arises

# Anti-Luxury Travelers Appear More Likely to Be Mindful Travelers

**% Has taken a trip that was primarily for religious or spiritual purposes (past 2 years)**



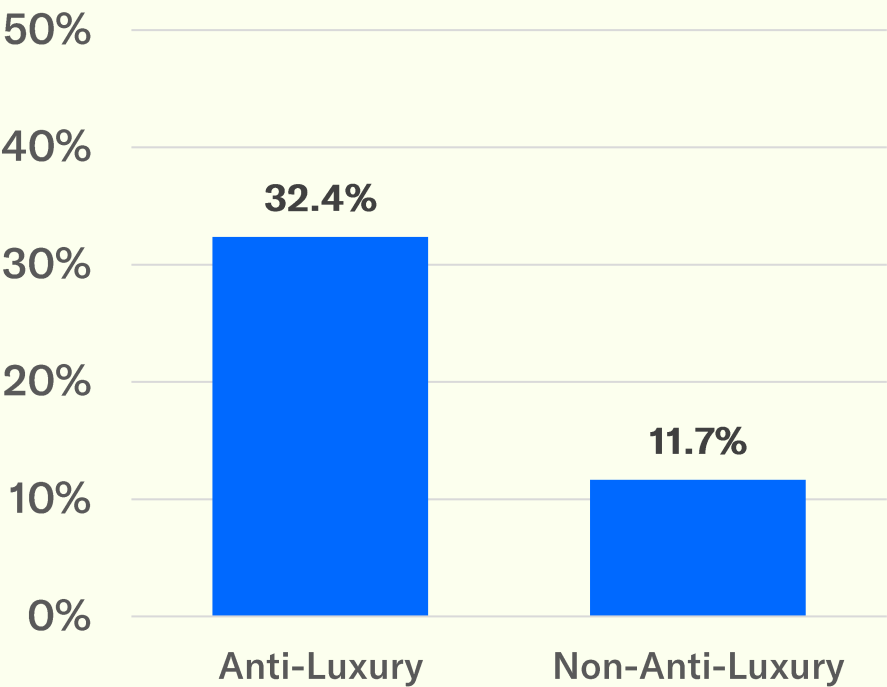
**% Expects to be more proactive in reducing the impact of their travel on the environment this year**



# Anti-Luxury Travelers Are Nearly Three Times As Likely to Prefer Peak Season Travel

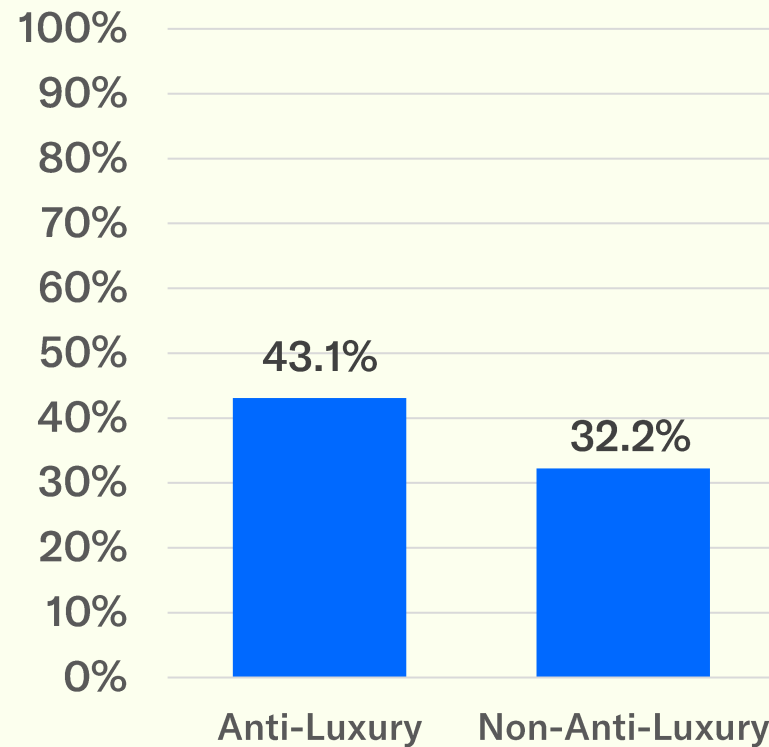
*Question: When do you typically prefer to travel for leisure?*

Typically Prefers Peak Season Travel

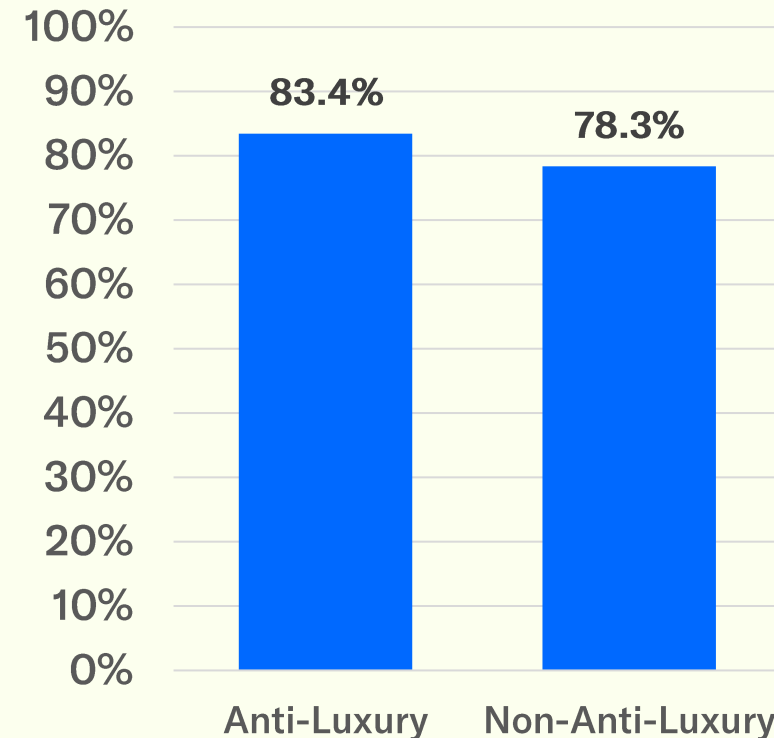


# Anti-Luxury Travelers Are More Stressed-out, But More Satisfied Overall With Life

**% Always or Often Feels Elevated Levels of Stress in Life**



**% Satisfied or Very Satisfied with life**





# The State of the American Traveler

Welcome back, Future Partners!





# Traveler Types

How preferences, values, and lifestyles shape the way people travel.



Road Trip vs. Air Travel

Seasonal Preferences

Luxury Travelers

Wellness Travelers

Spontaneous Travelers

Multi-Generational Travelers

Pet Travelers

Guided Group Tourists

Politics & Travel

# Road Trip vs. Air Travel

2025 YTD American Travelers

Year

2025 YTD

Curated Collections

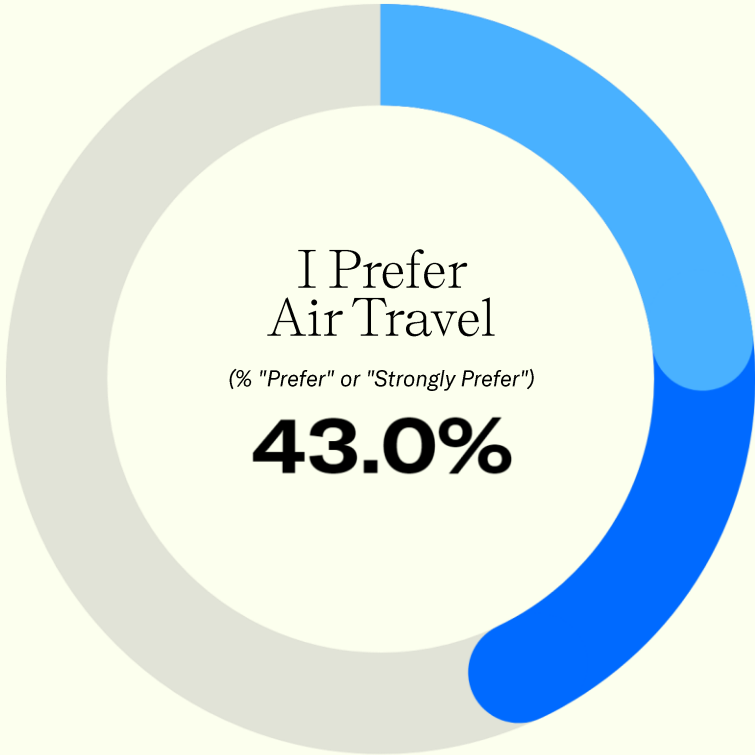
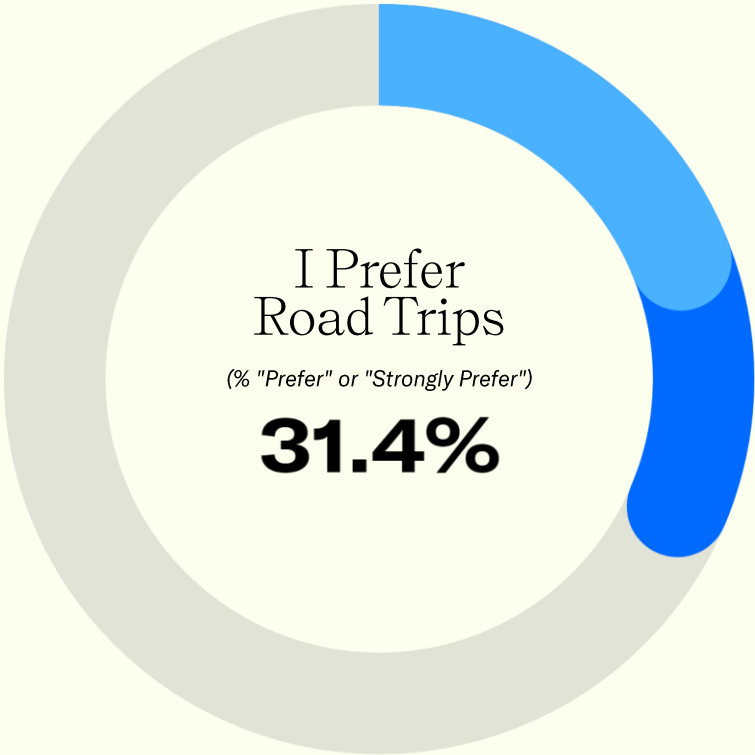
Total

Filters

American Travelers

Total

Total



Prefer  
Strongly Prefer

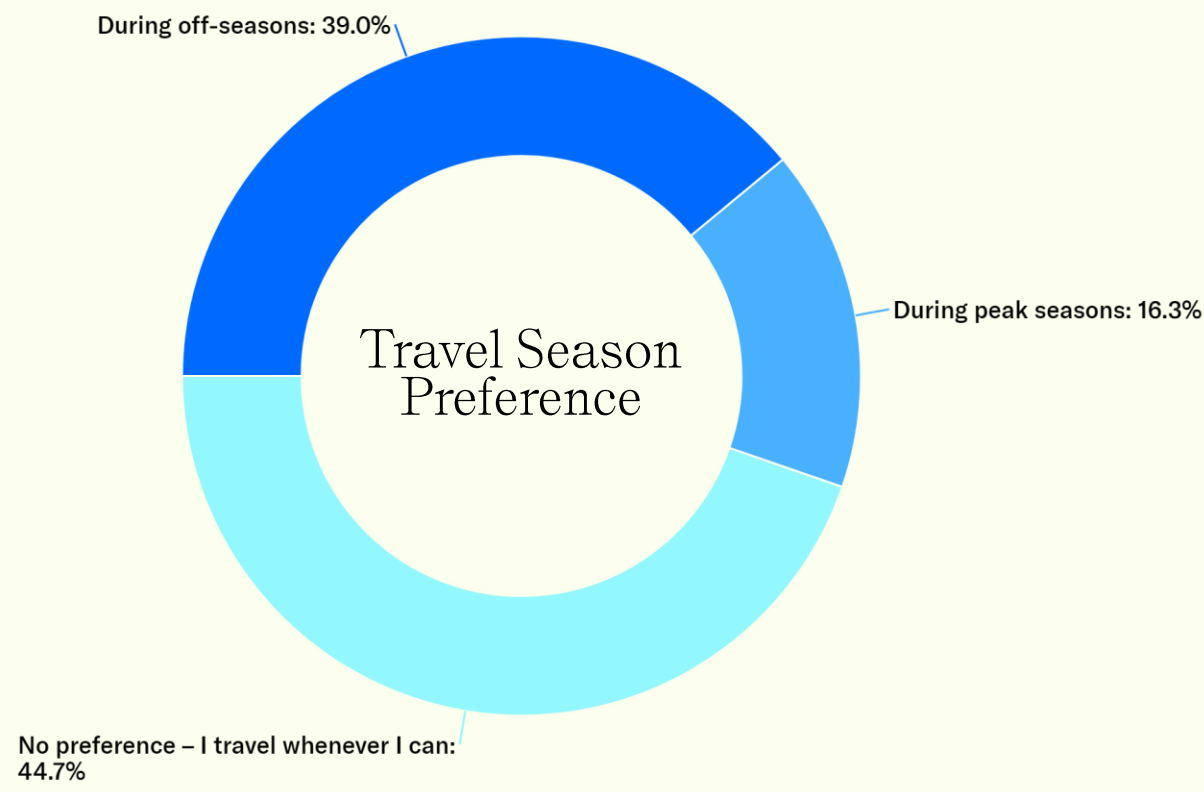
Question: Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)? (Select one that best completes the sentence)

When it comes to road trips vs. air travel, I...

# Seasonal Preferences

2025 YTD American Travelers

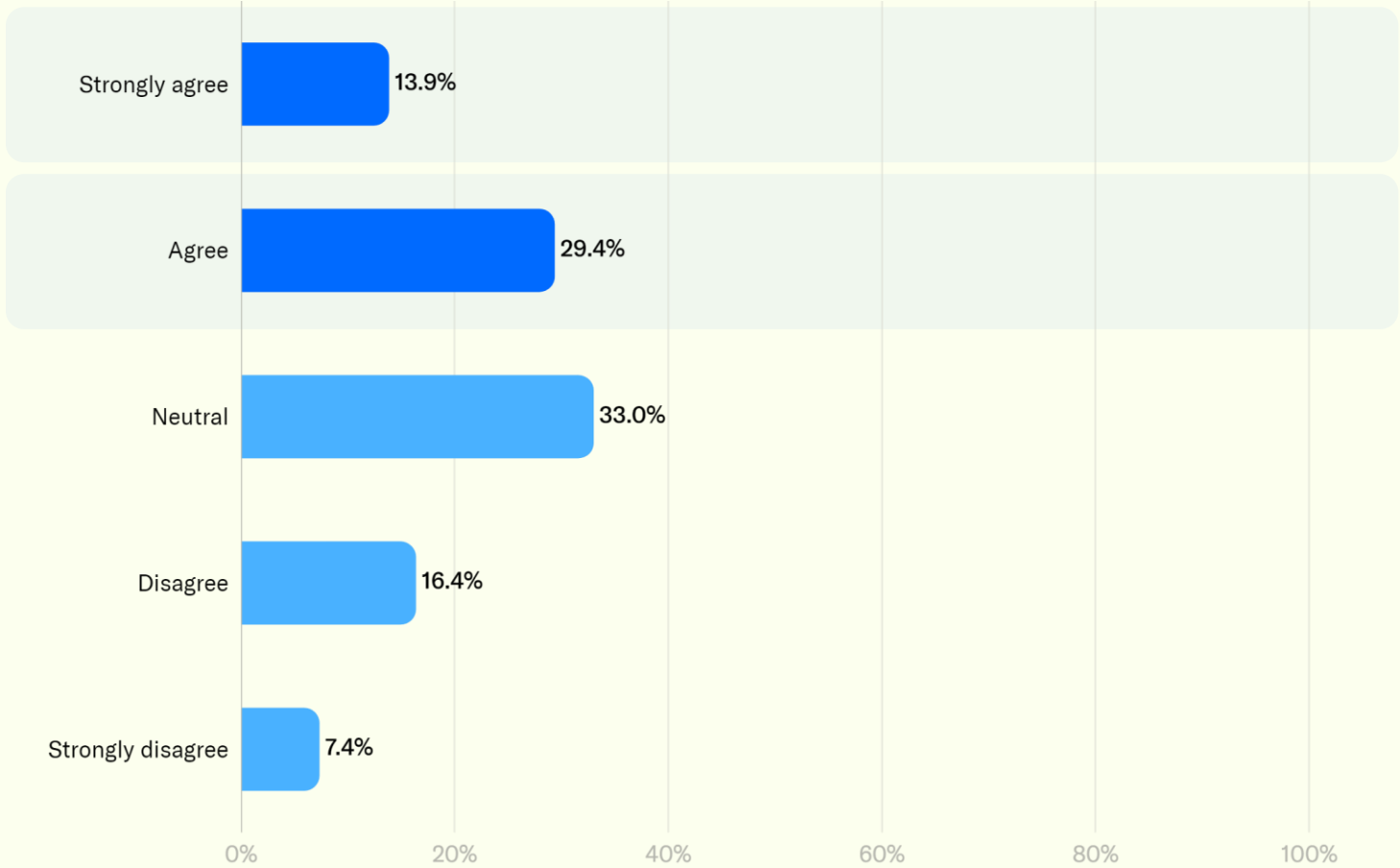
Year	Curated Collections	Filters	
2025 YTD	Total	American Travelers	
		Total	Total





# Luxury Travelers

2025 YTD American Travelers



Year

2025 YTD

Curated Collections


Total

Filters

American Travelers

Total

Total



Luxury Travelers

Top 2 Box

Scores: Agreement

American Travelers

(2025 YTD)

43.2%

Please select a Filter from the Curated Collections above to view national benchmarking.

# Wellness Travelers

2025 YTD American Travelers

Year

2025 YTD

Curated Collections

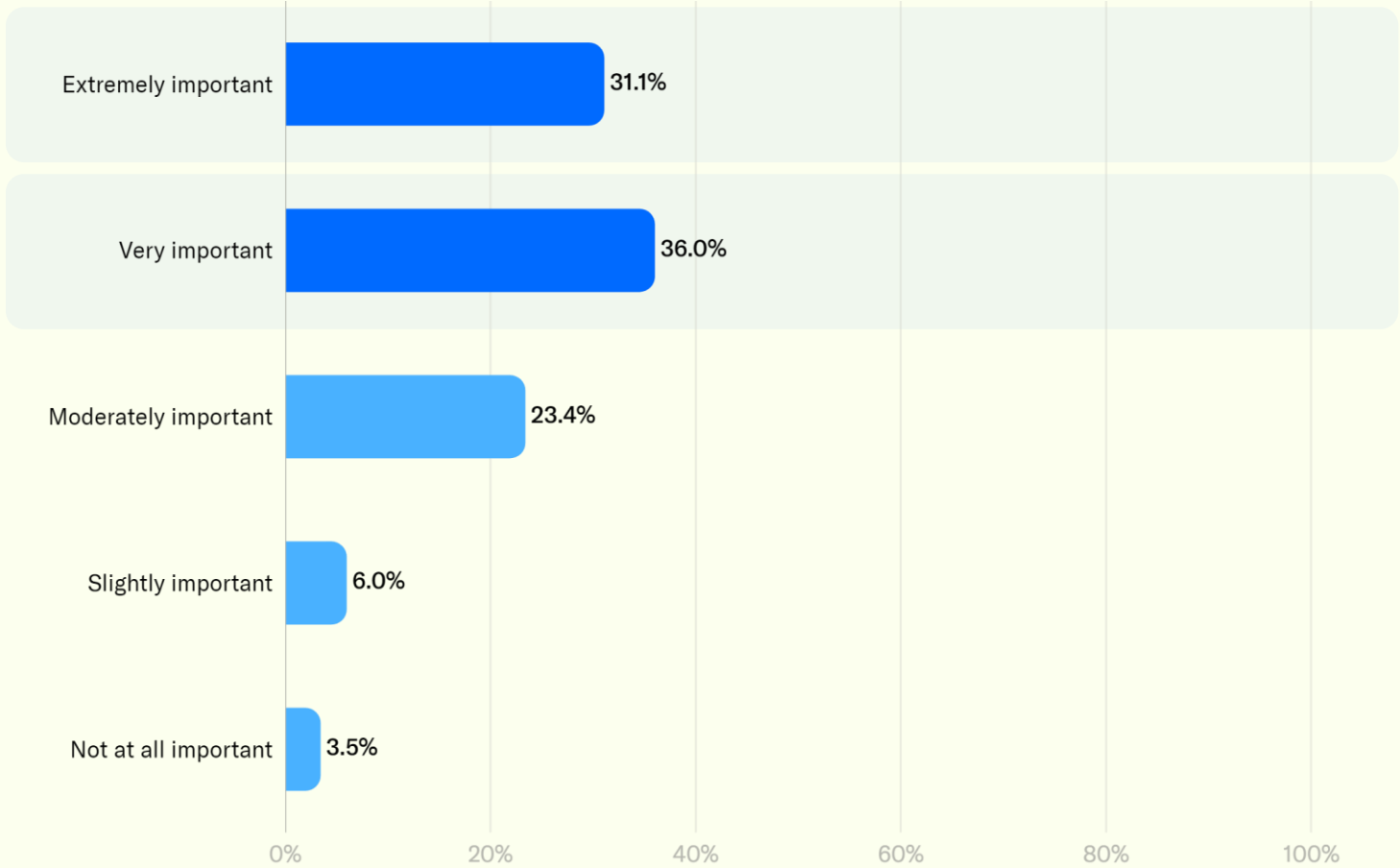
Total


Filters

American Travelers

Total

Total





Wellness Travelers

Top 2 Box

Scores: Importance

American Travelers

(2025 YTD)

67.1%

Please select a Filter from the Curated Collections above to view national benchmarking.

# Spontaneous Travelers

2025 YTD American Travelers

Year

2025 YTD

Curated Collections

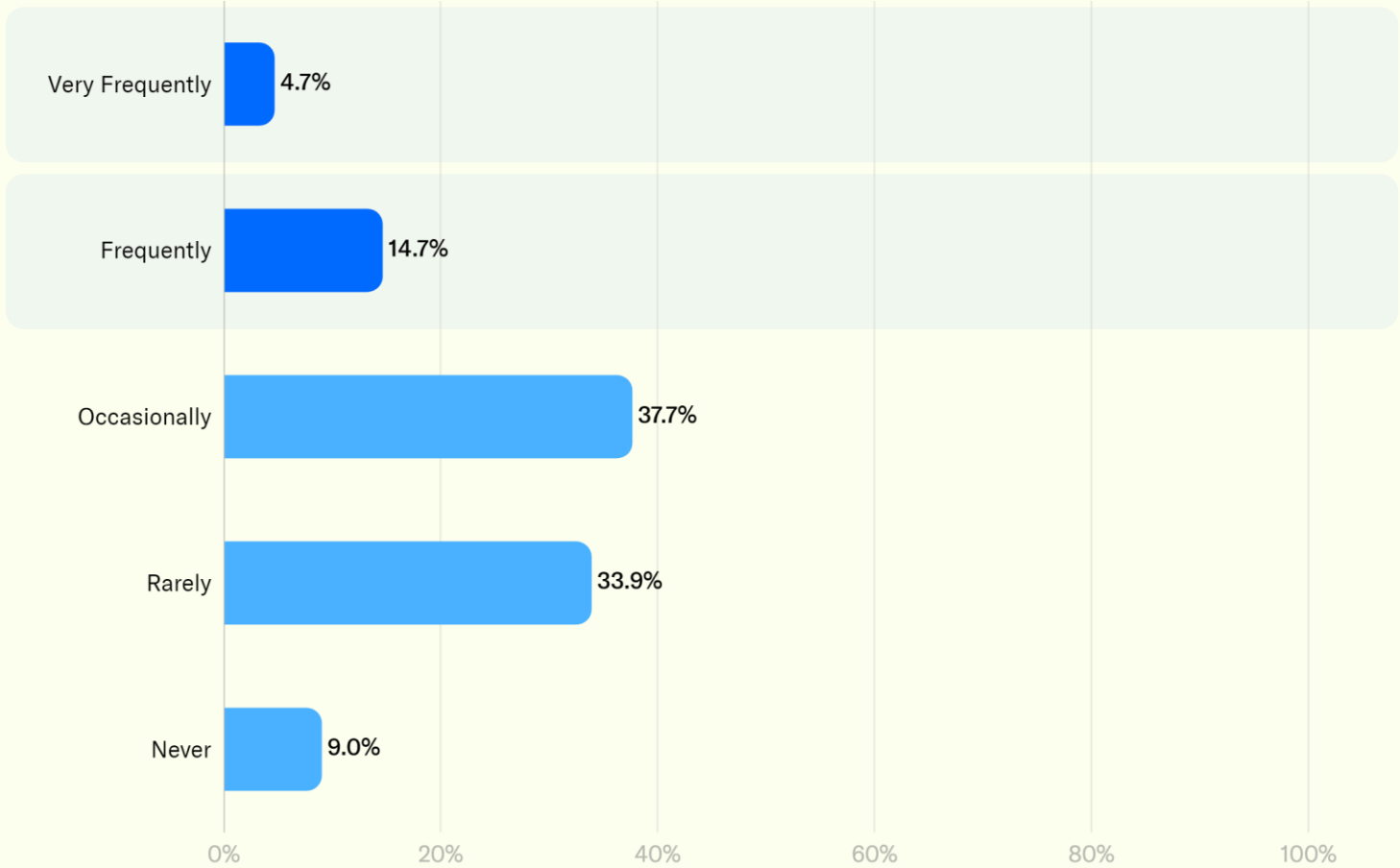
Total

Filters

American Travelers

Total

Total



## Spontaneous Travelers

Top 2 Box

Scores: Frequently

American Travelers

(2025 YTD)

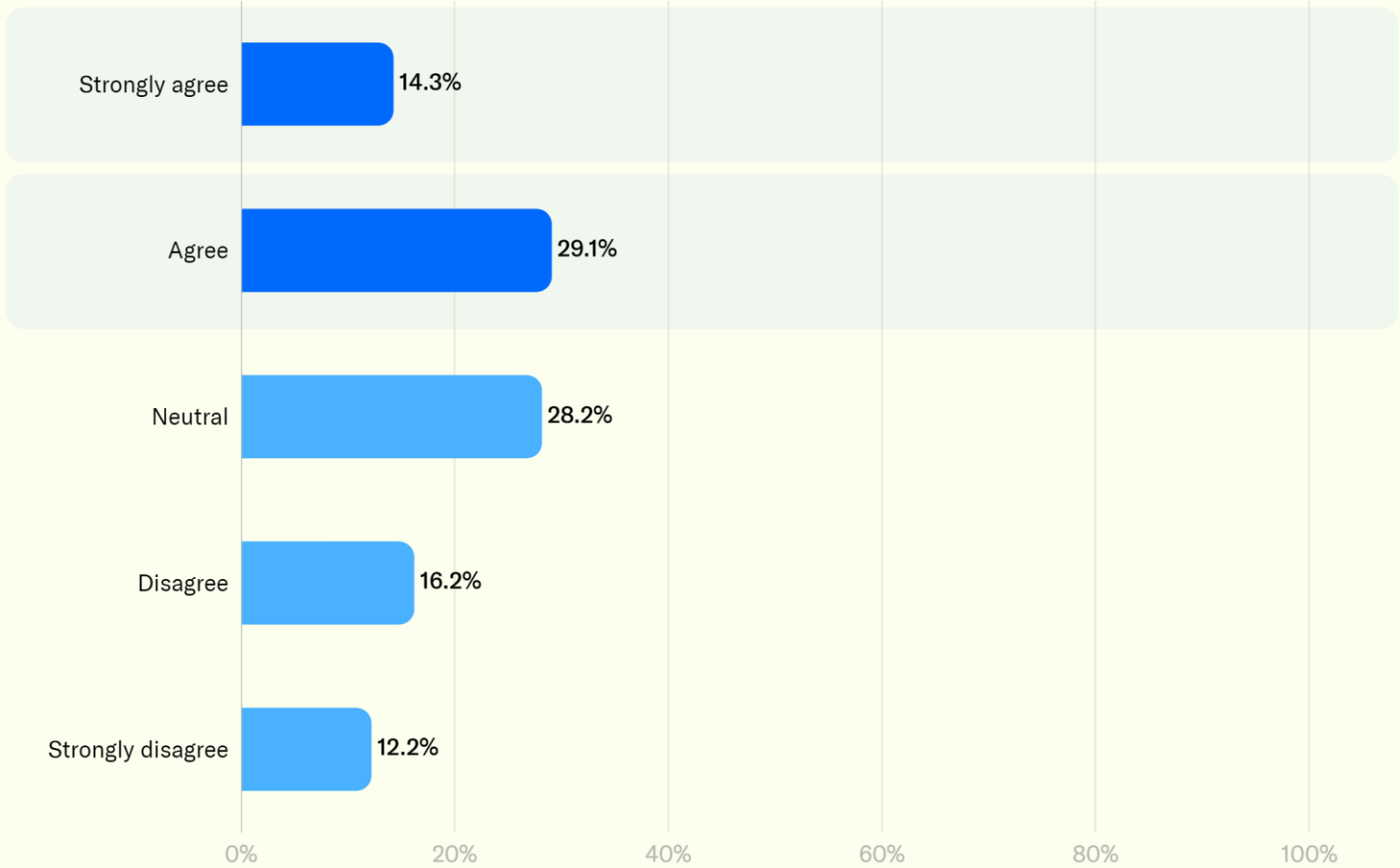
19.4%

Please select a Filter from the Curated Collections above to view national benchmarking.



# Multi-Generational Travelers

2025 YTD American Travelers



Year

2025 YTD

Curated Collections

Total

Filters

American Travelers

Total

Total

Multi-Generational Travelers

Scores: Agreement

Top 2 Box

American Travelers

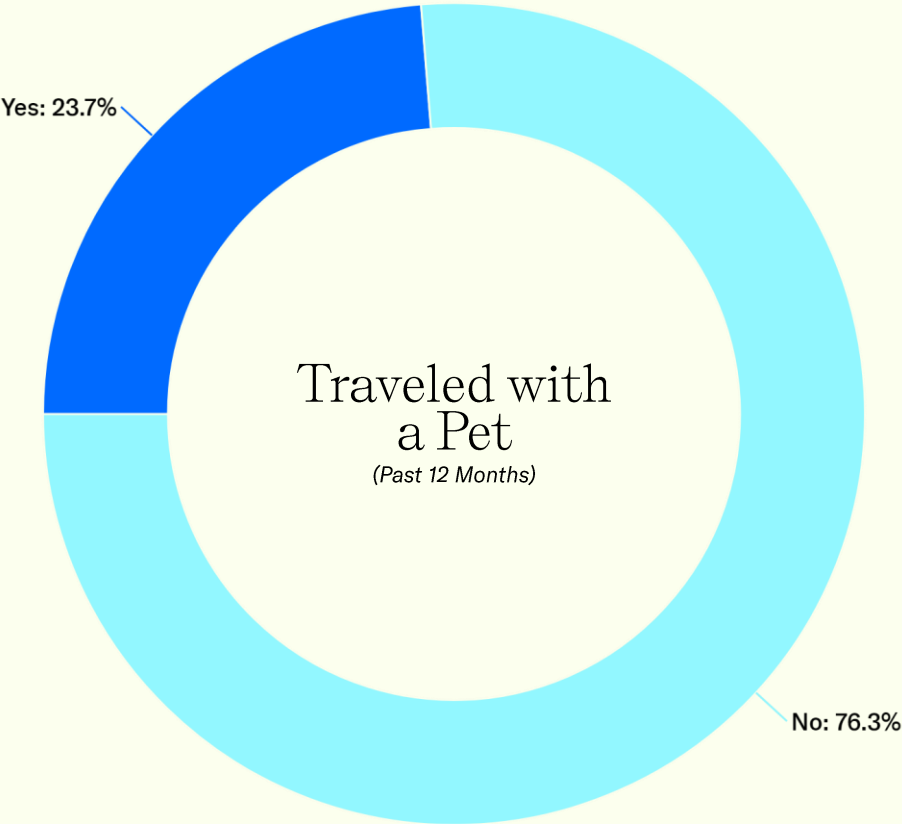
(2025 YTD)

43.4%

Please select a Filter from the Curated Collections above to view national benchmarking.

# Pet Travelers

2025 YTD American Travelers



Year	Curated Collections	Filters
2025 YTD	Total	American Travelers
		Total
		Total



**Pet Travelers**  
% Selecting Yes

**American Travelers**  
(2025 YTD)

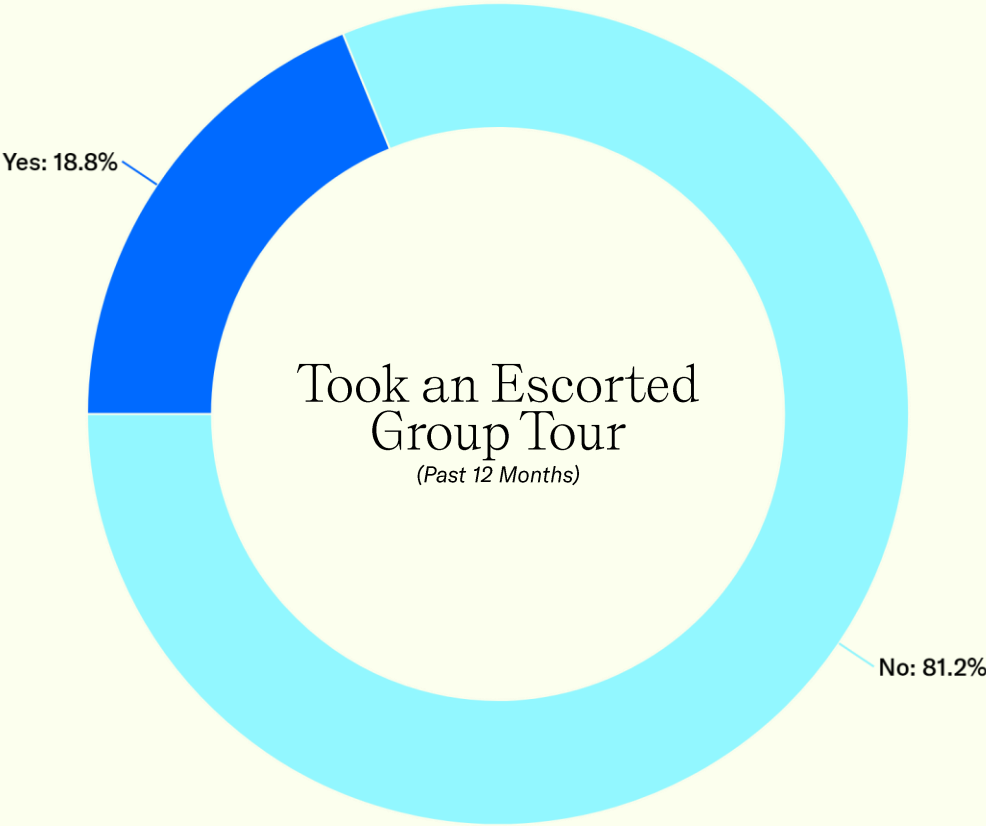
**23.7%**



Please select a Filter from the Curated Collections above to view national benchmarking.

# Guided Group Tourists

2025 YTD American Travelers



Year	Curated Collections	Filters
2025 YTD	Total	American Travelers
		Total
		Total



## Guided Group Tourists

% Selecting Yes

American Travelers  
(2025 YTD)

18.8%



Please select a Filter from the Curated Collections above to view national benchmarking.

# Politics & Travel

2025 YTD American Travelers

Year

2025 YTD

Curated Collections

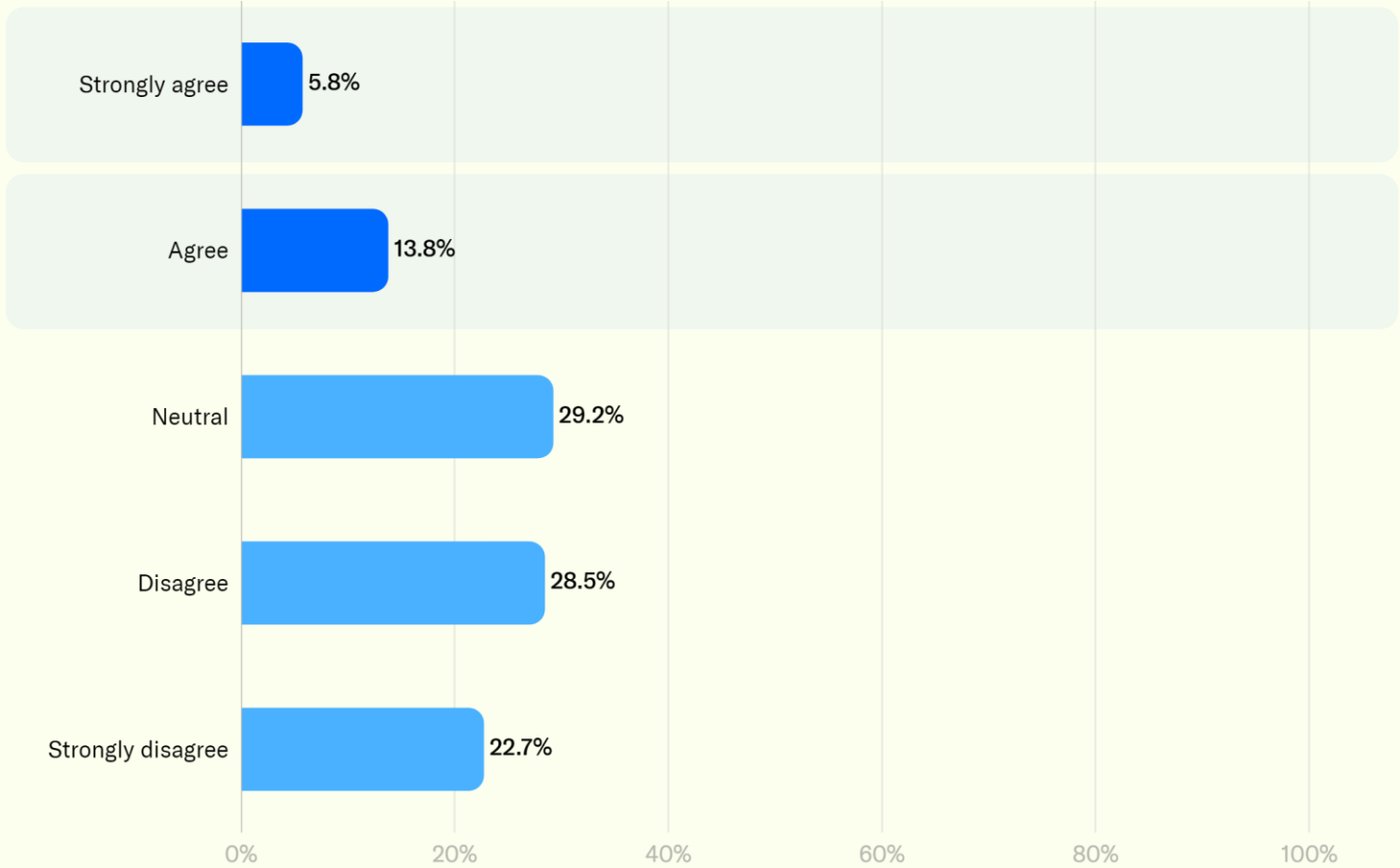
Total

Filters

American Travelers

Total

Total



Politically-Conscious Travelers

Top 2 Box

Scores: Agreement

American Travelers

(2025 YTD)

19.6%

Please select a Filter from the Curated Collections above to view national benchmarking.

# 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%).

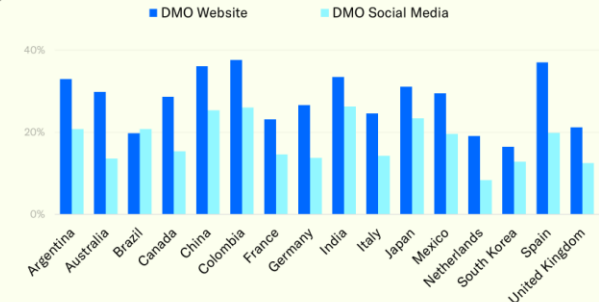
Use of DMO Websites  
(% who would use for planning)

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





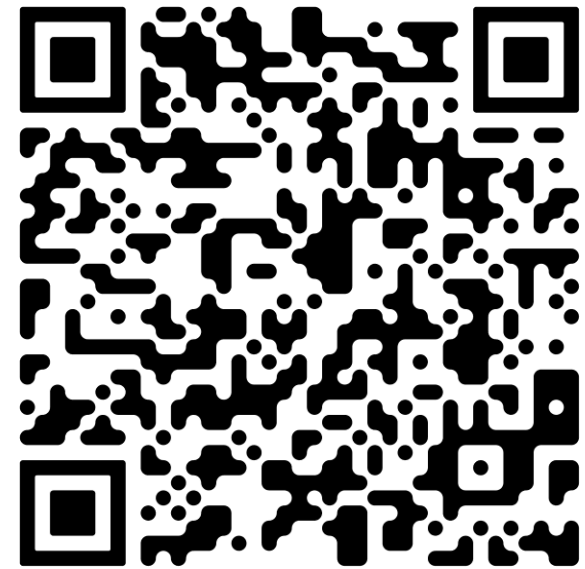


# Jennifer Griswold

*Director of Partner Engagement*

*Jennifer@futurepartners.com*

*Discuss Your Research Needs*





# November 18

12:00 PM Pacific

## ***The State of the American Traveler*** **Destination Management Edition** **Webinar**

*Join Us*



# Let's keep the conversation going



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