

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

### Future Partners

#### Methodology

- Monthly tracking survey
- Representative sample of adult
   American travelers in each of four U.S.
   regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- 4,000+ fully completed surveys collected each wave.
- Survey collected October 18-27
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region

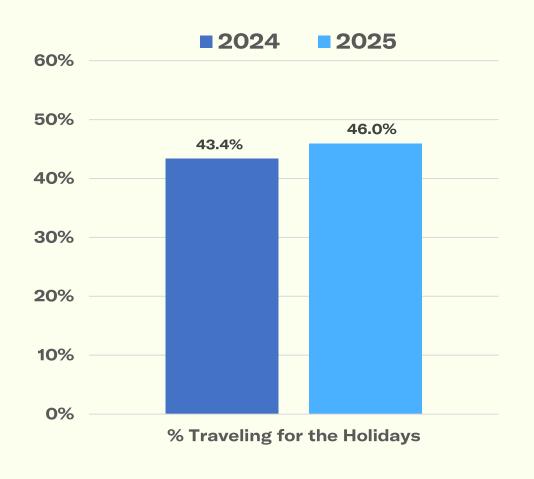
#### **United States Census Regions**



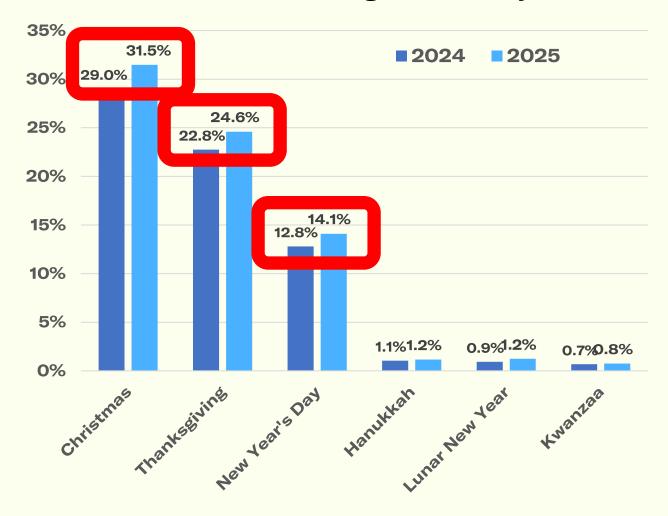
### Today

- Travel Sentiment Overview
  - FIFA, 2026 Travelers
  - **Route 66 Anniversary Travelers**
- America 250

#### Holiday Travel Looks Solid This Year



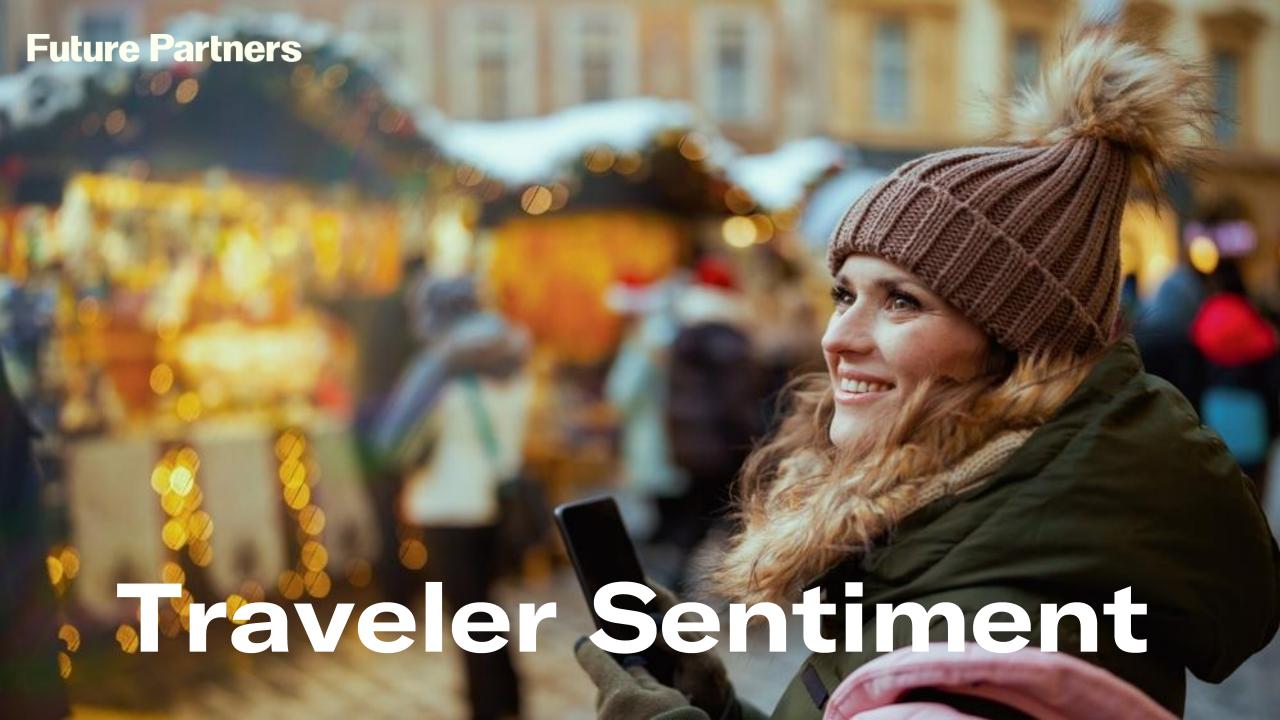
#### % of Americans Traveling for the Holiday

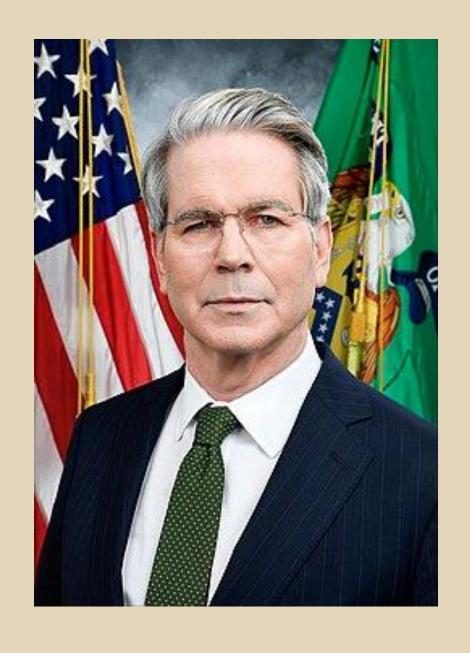


## What's Your Favorite Holiday Travel Memory?

Tell us in the chat!







"While the overall economy remains relatively stable, certain sectors are in recession."

Scott Bessent
US Secretary of the Treasury
CNN's State of the Union Nov. 1, 2025



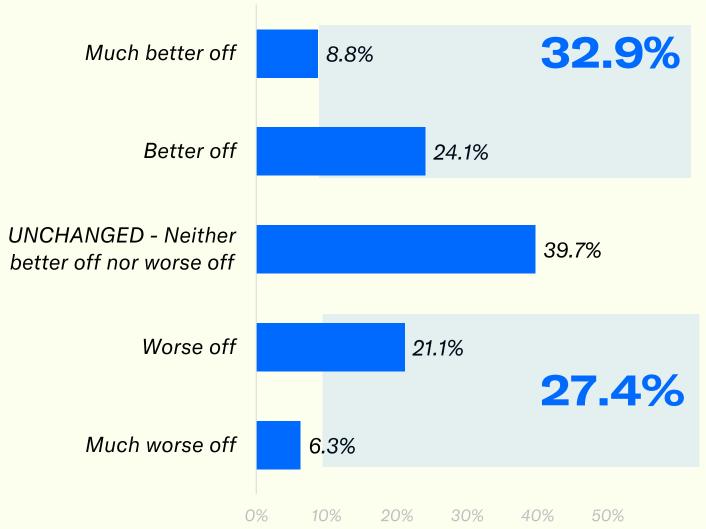
"The US economy, which appears OK by the most commonly used measures, is definitely not OK once you look under the hood. One essential aspect of this weirdness is the economy is strongly bifurcated...people who were already affluent are becoming more so, but the less well-off are under severe pressure."

Paul Krugman Nobel Laureat Economist

### A Minor Mood Shift: Travelers Feeling a Little Less Flush

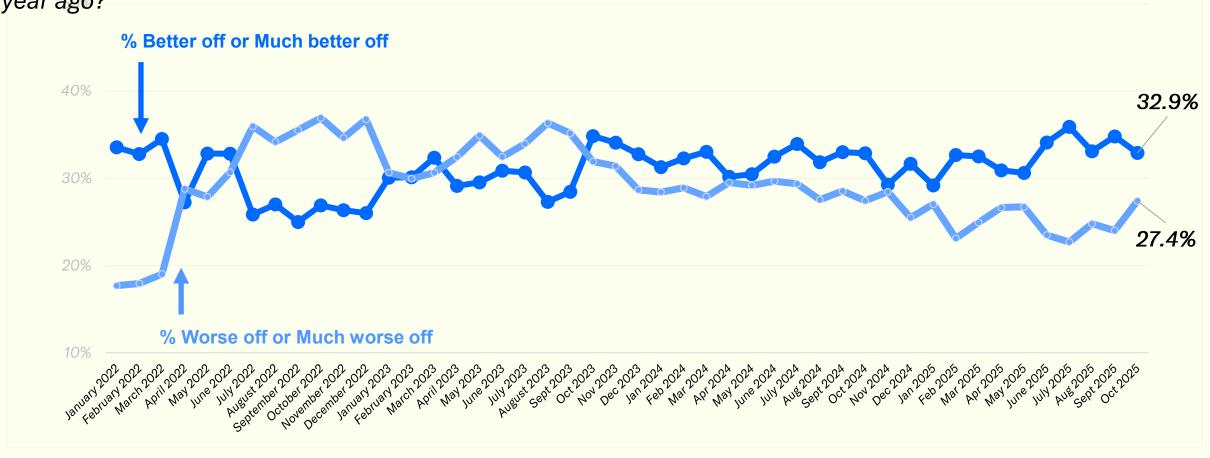
#### **Question:**

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



### A Minor Mood Shift: Travelers Feeling a Little Less Flush

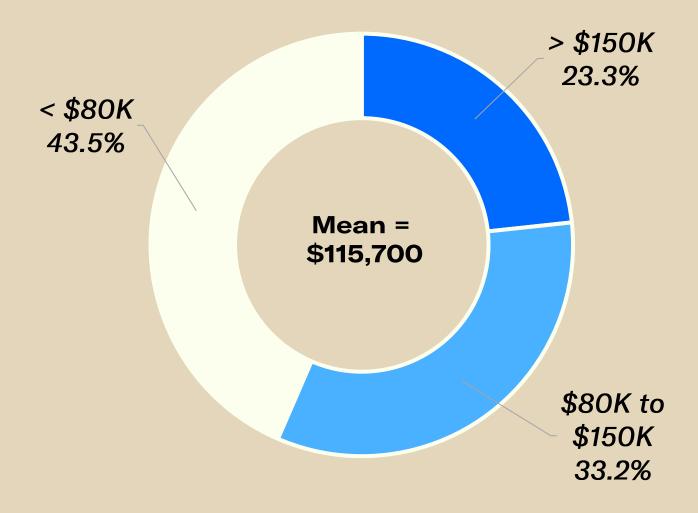
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?



#### **American Travel Income Landscape**

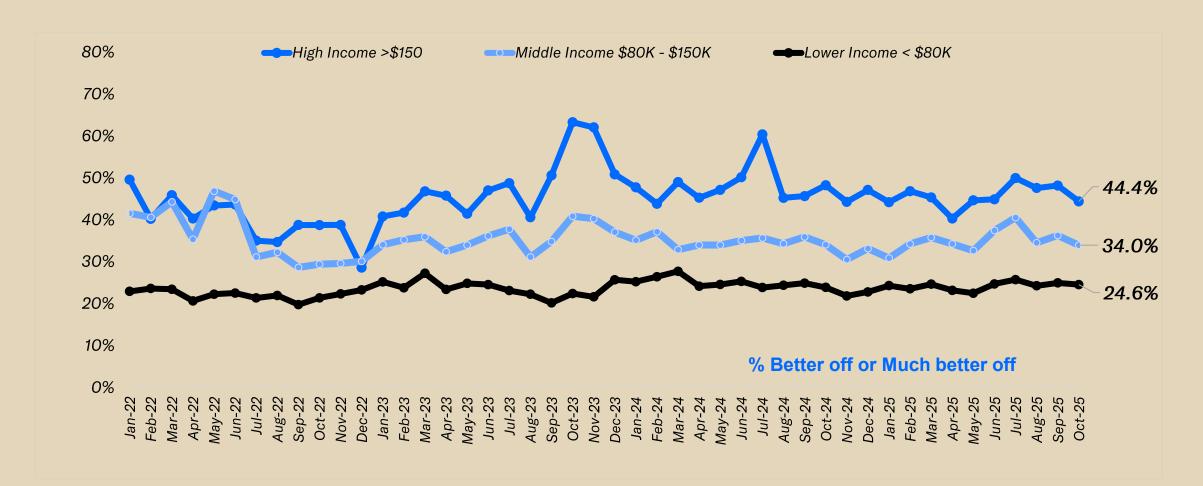
#### **Question:**

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



#### **Affluent Travelers are Feeling Good Financially**

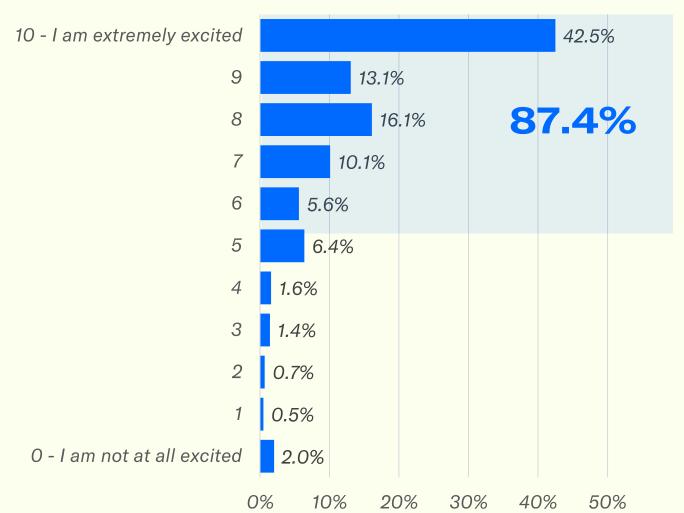
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?



### Americans' Appetite for Travel Still Alive and Well (All American Travelers)

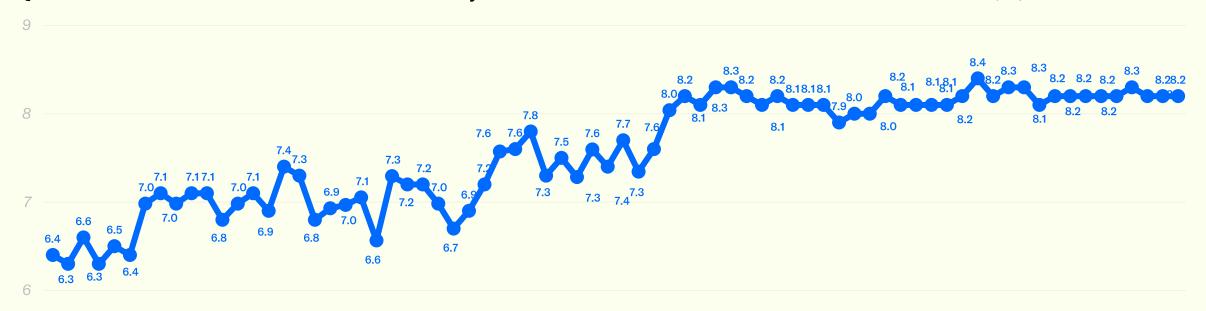
#### **Question:**

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



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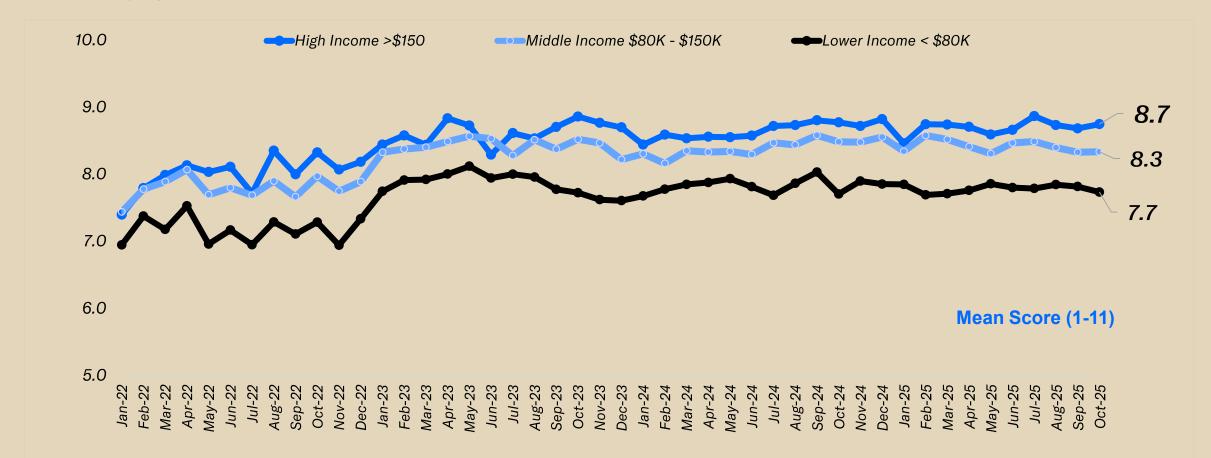


#### Mean Score on 11-point Scale



### Affluent Travelers Show Far Higher Enthusiasm for Leisure Travel

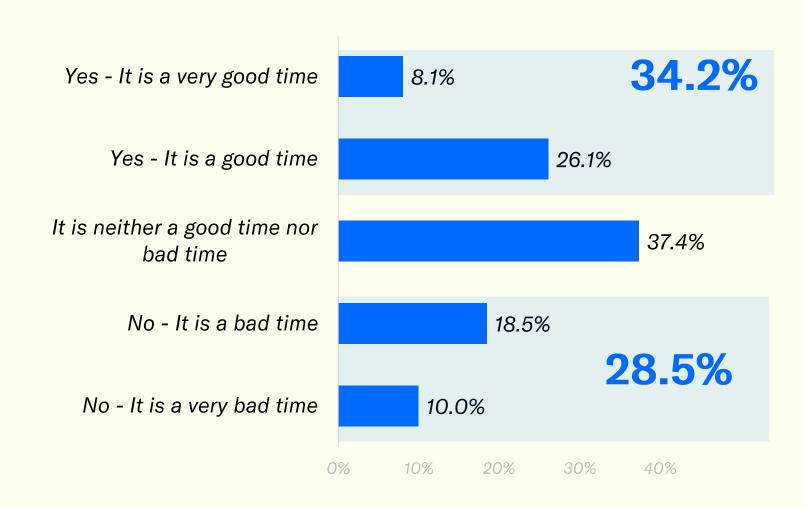
**Question:** Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



### Spending Confidence Continues a Creeping Decline

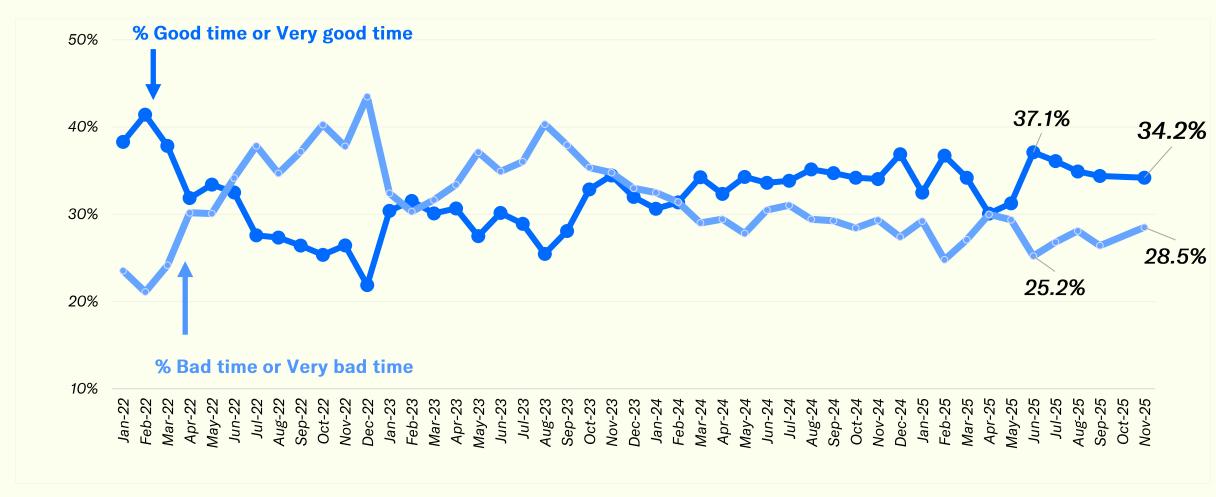
#### **Question:**

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?



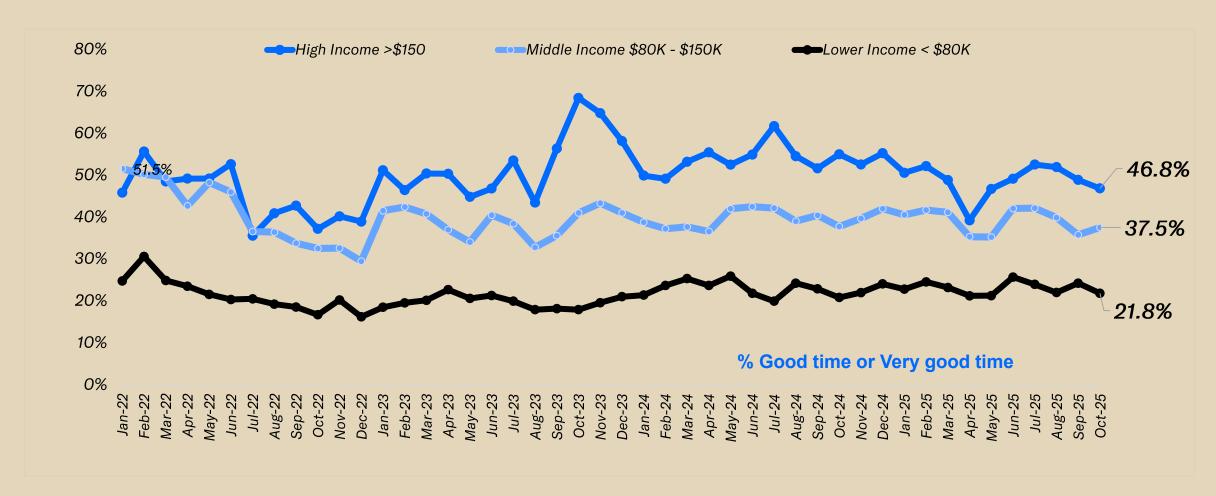
### Spending Confidence Continues a Creeping Decline Since Summer

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?



#### Affluent Travelers Also Show a Slight Decline

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?

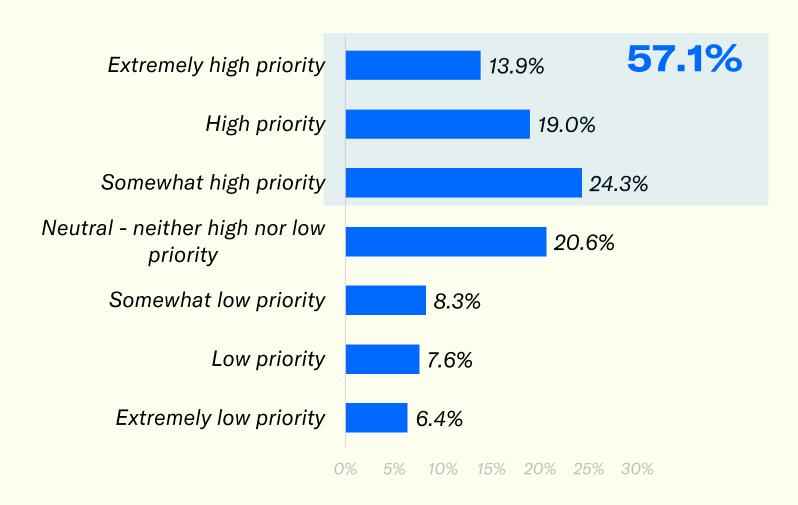


### Even with Belt-Tightening, Travel Remains a Budget Priority (All American Travelers)

#### **Question:**

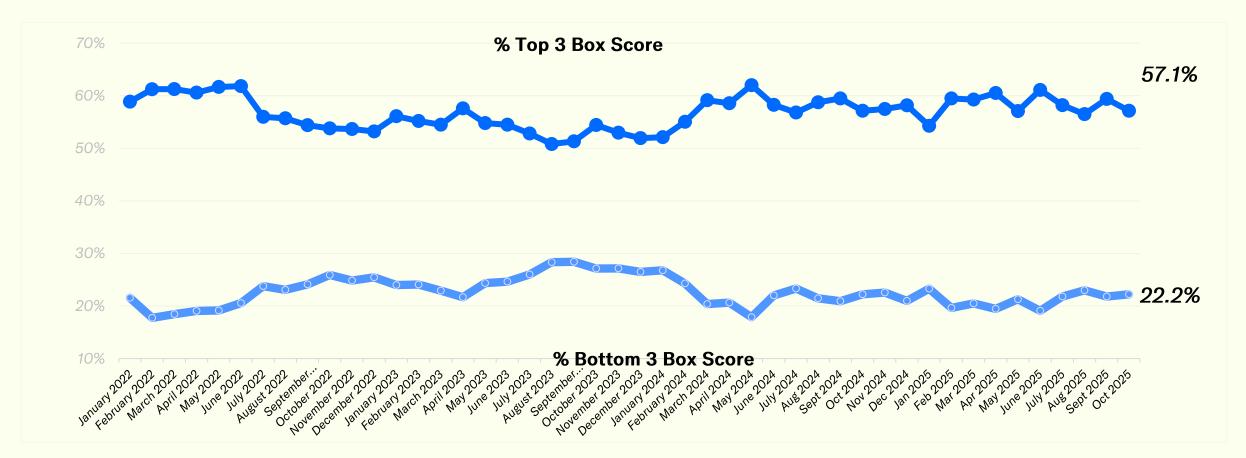
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

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



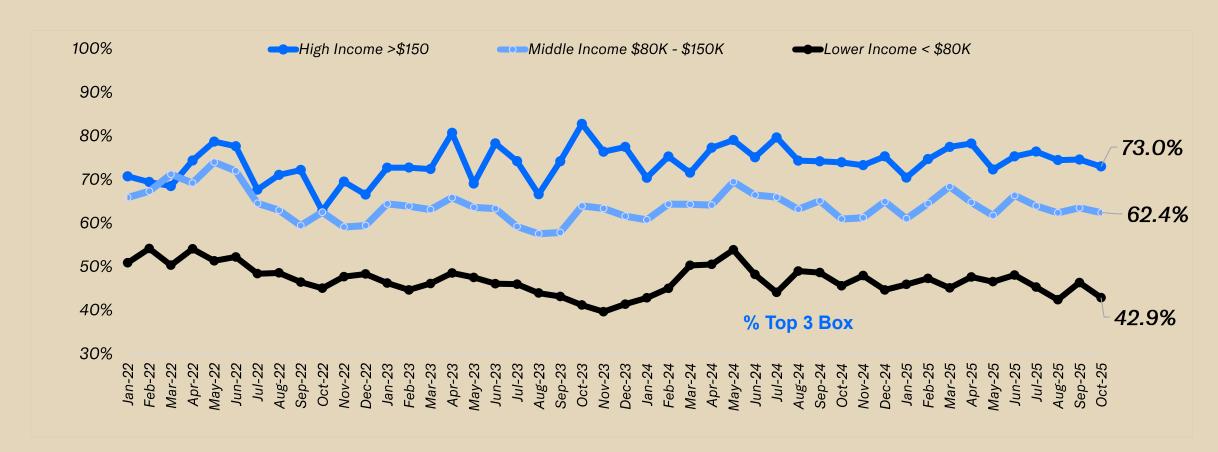
### Even with Belt-Tightening, Travel Remains a Budget Priority

**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.



### The Vast Majority of Affluent Travelers Will Be Prioritizing 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.

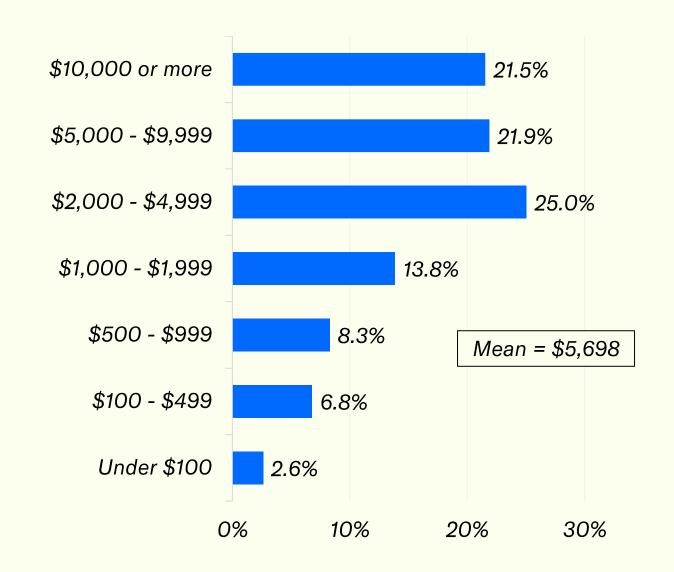


#### Maximum Travel Budgets Dip, But Remain Elevated

(All American Travelers)

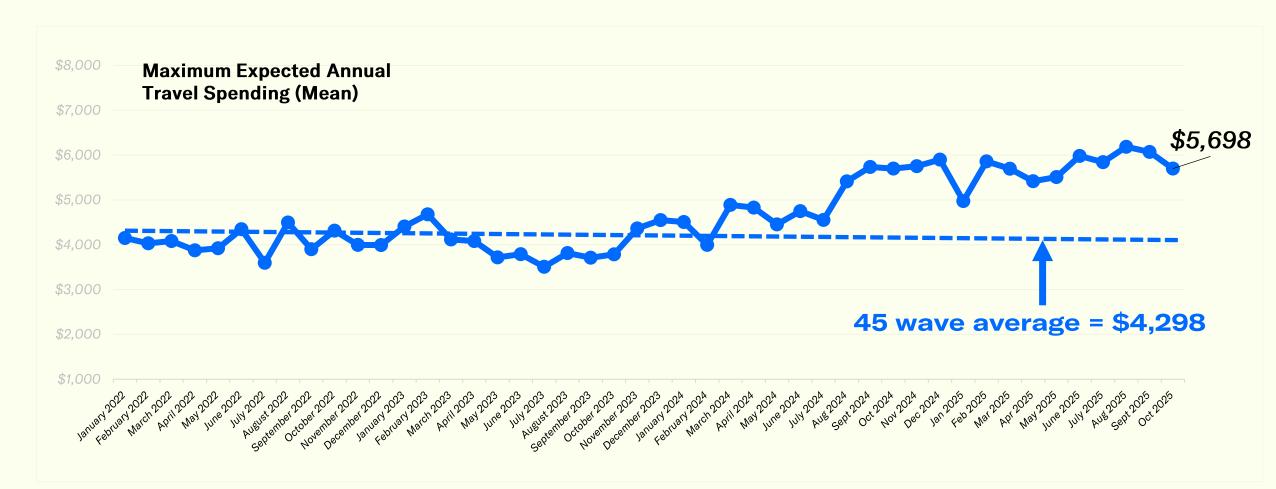
#### **Question:**

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 Travel Budgets Dip, But Remain Elevated (All American Travelers)

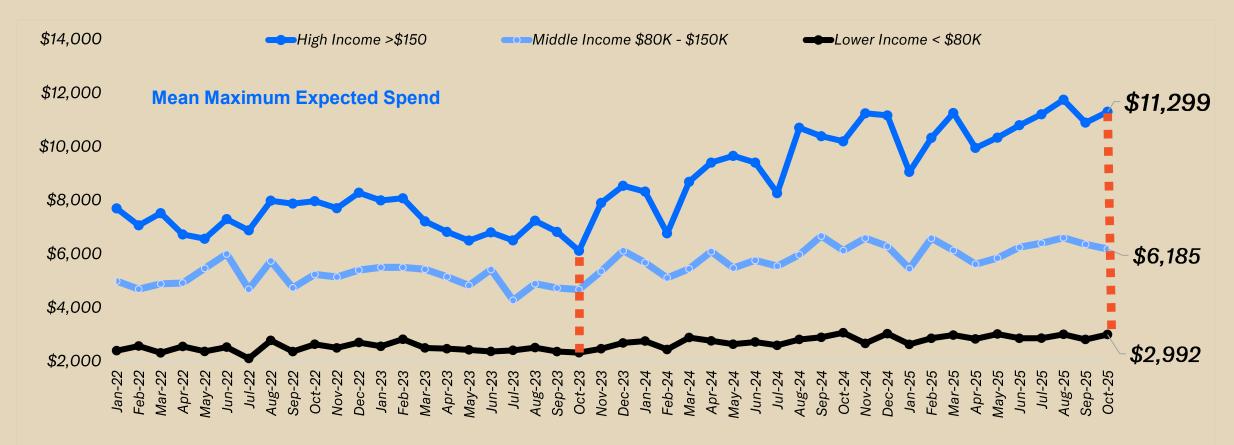
**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



## The Travel Spending Gap Widens: The Affluent Soar, Others Stand Still.

### Affluent Travelers Race Ahead in Travel Spending Growth

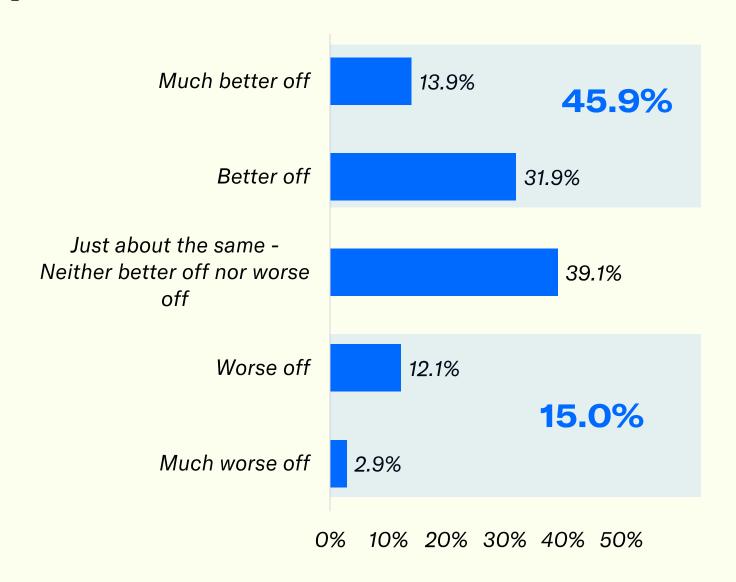
**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



#### **Traveler Financial Expectations Flat This Month**

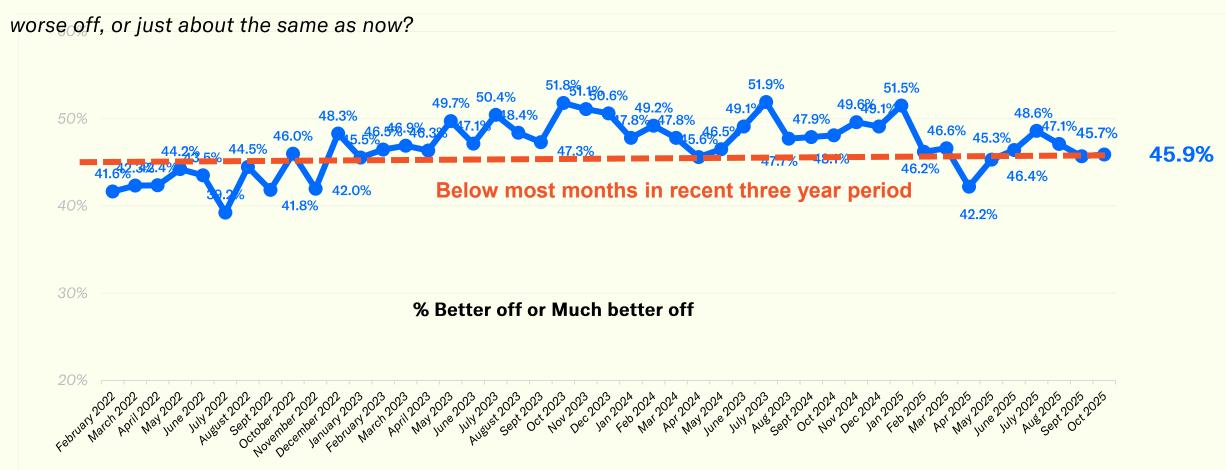
#### **Question:**

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?



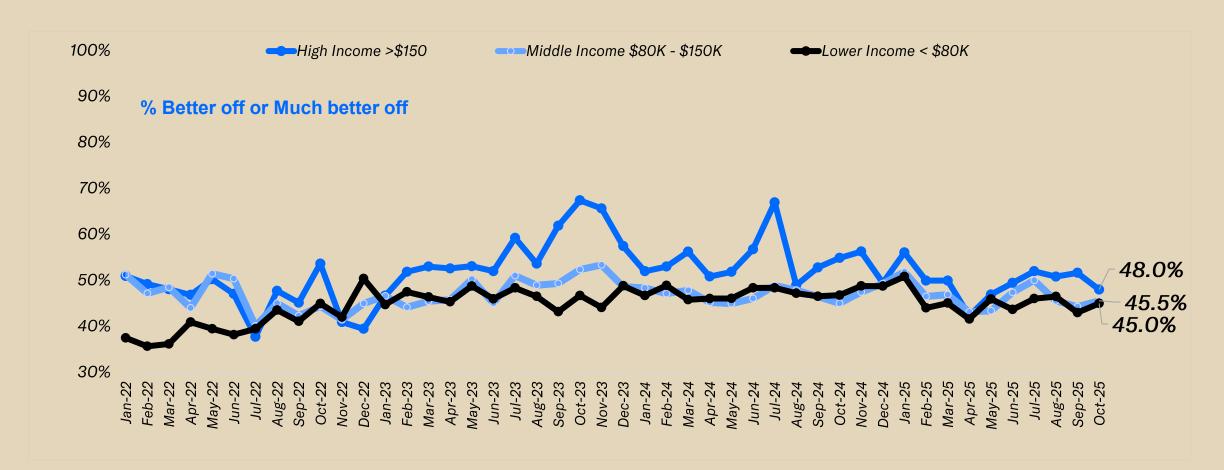
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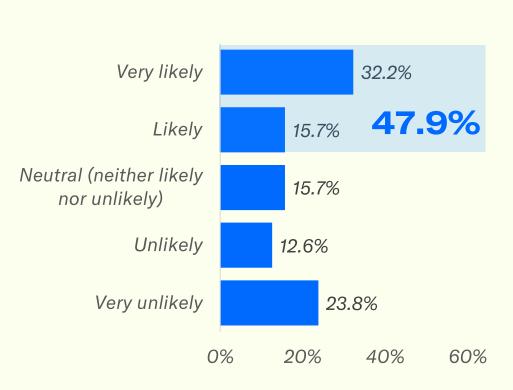
#### All Income Levels Share Similar Financial Outlooks

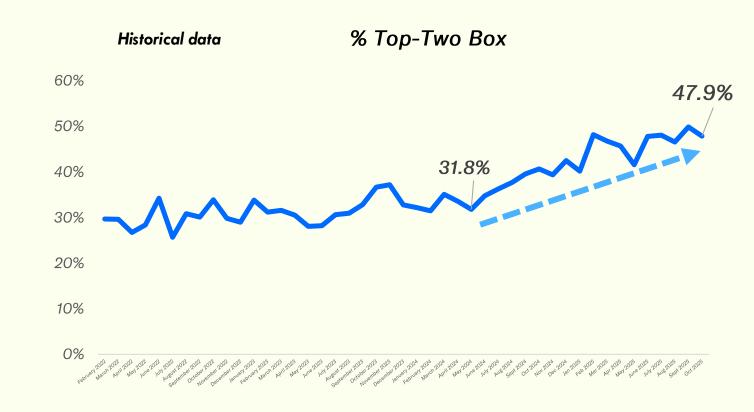
**Question:** LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



#### International Travel Expectations Are Strong

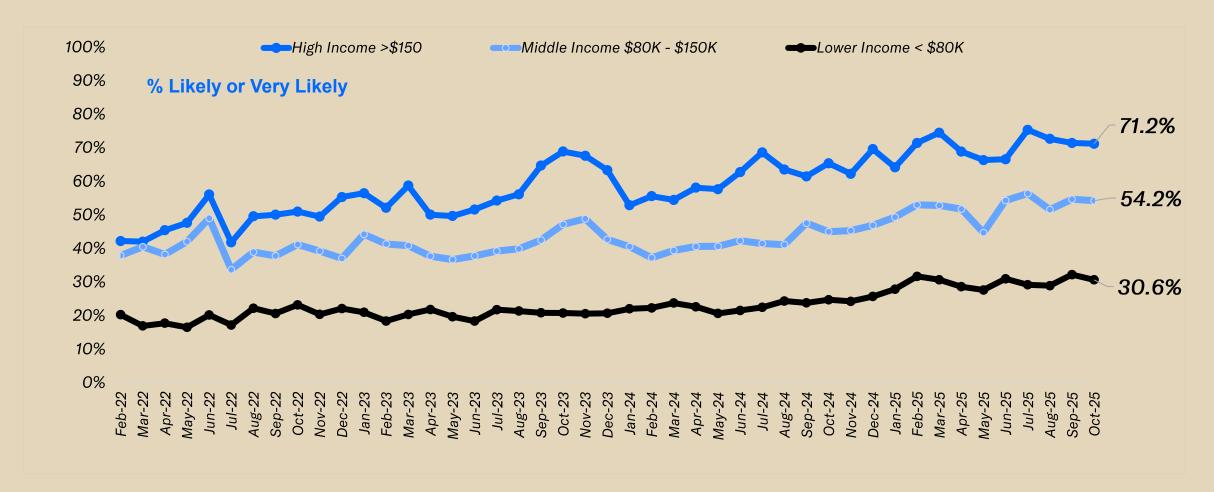
**Question:** How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?





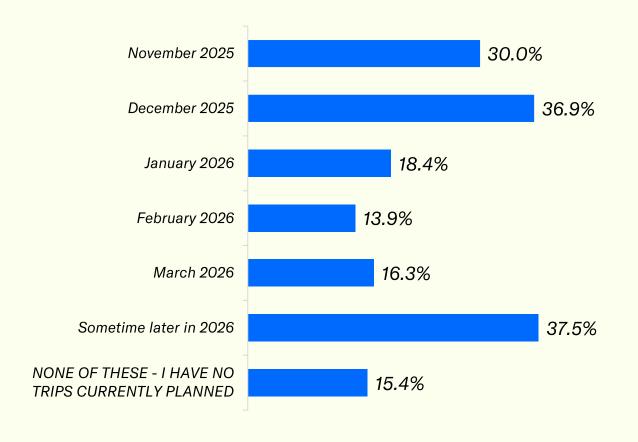
#### **Affluent Travelers are Outward Bound**

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



### Over 85% 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)?

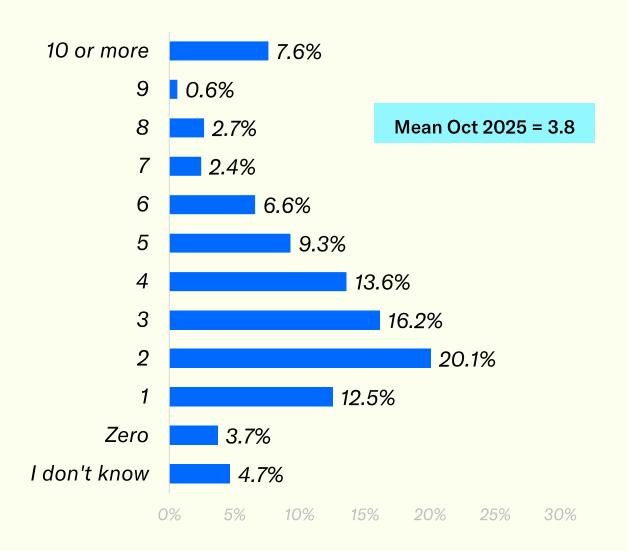




#### **Expected Trip Volume Holds Steady This Month**

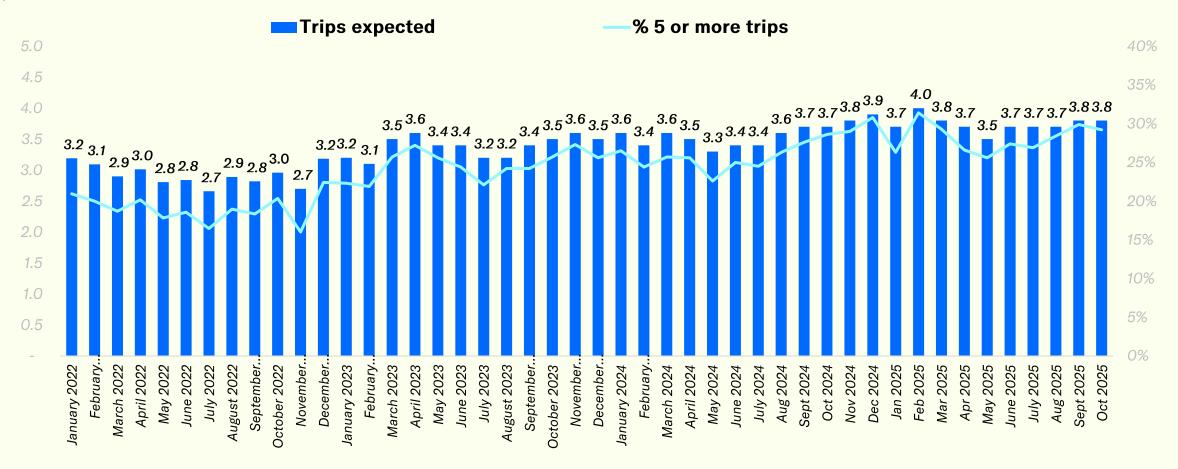
#### **Question:**

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



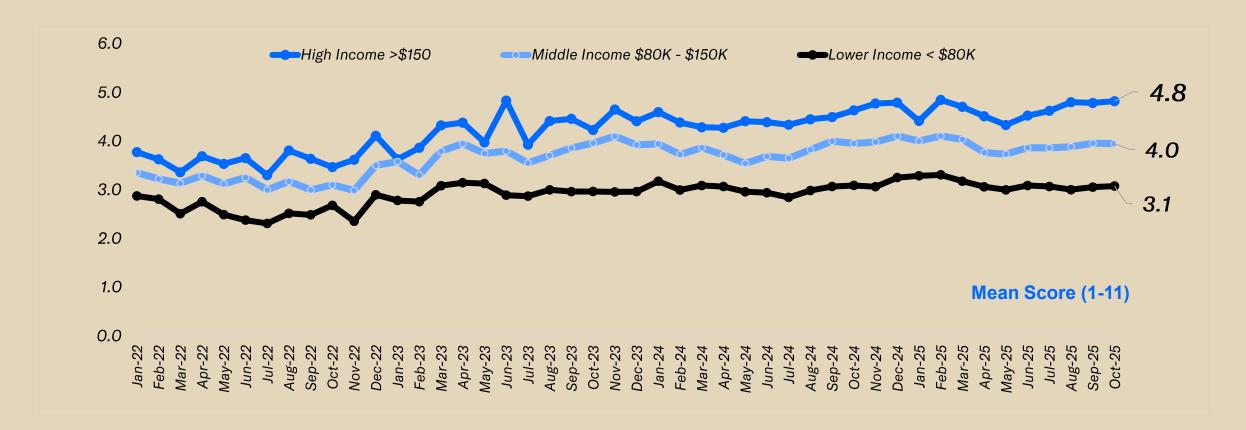
#### **Expected Trip Volume Holds Steady This Month**

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### Travel Gap Widens as Affluent Americans Eye Nearly 5 Vacations

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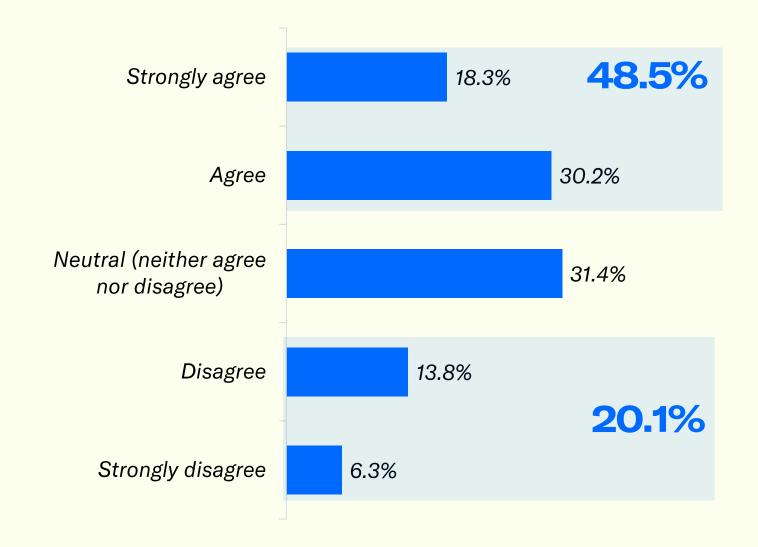


# How are Americans Feeling About the Future of the Economy?

## Recession Fears Edge Higher This Month

#### **Statement Agreement:**

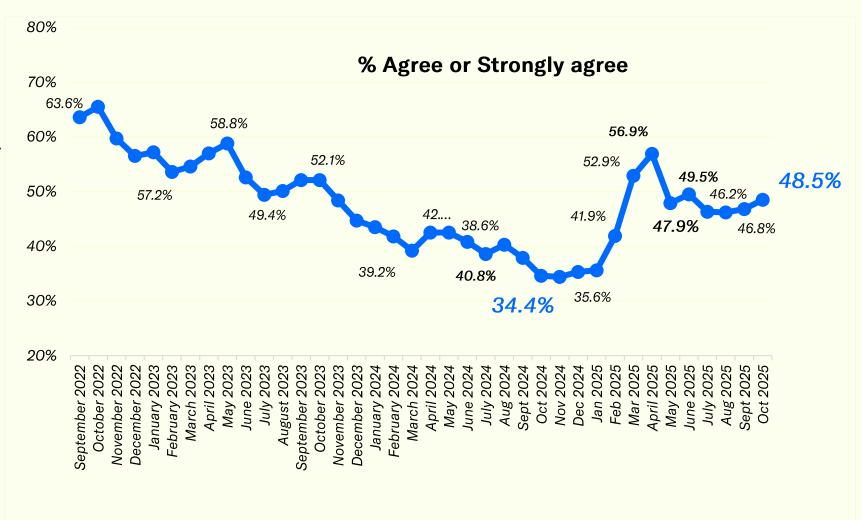
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



## Recession Fears Edge Higher This Month

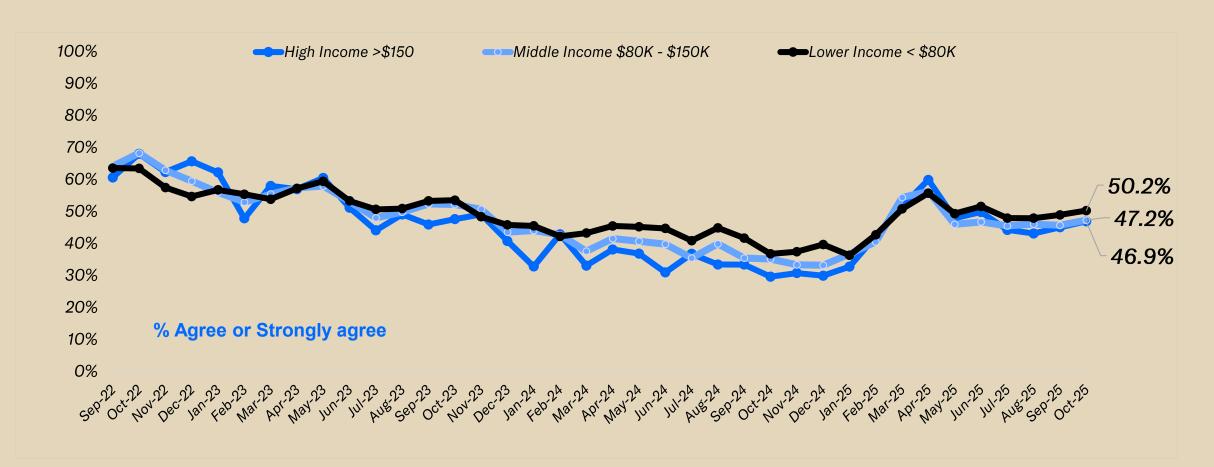
#### **Statement Agreement:**

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#### All Income Levels Share Similar Recessionary Concerns

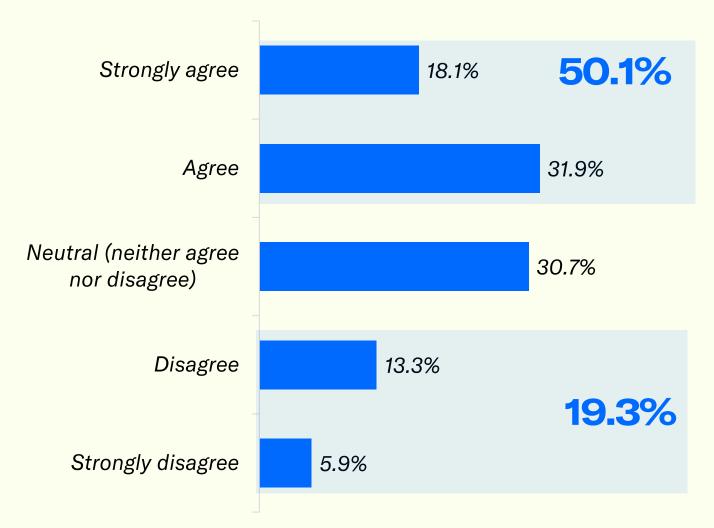
**Statement:** I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



## Recession Jitters Lead to More Careful Travel Spending

#### **Question:**

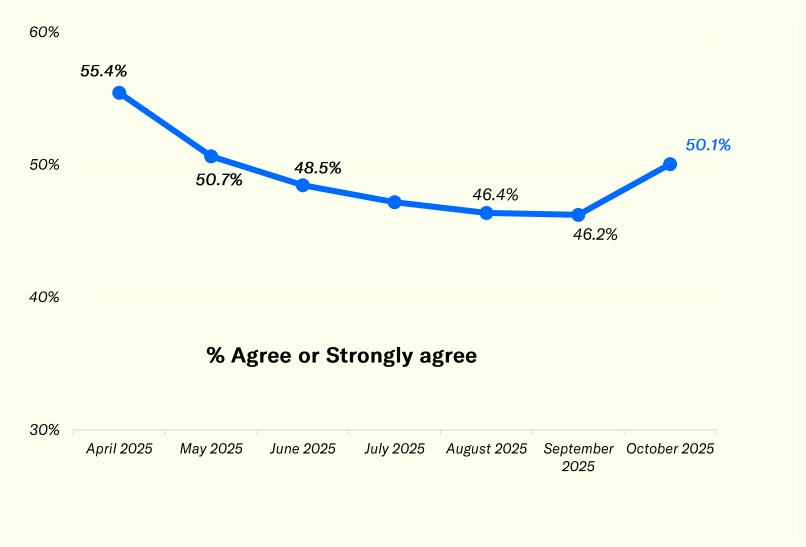
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



## Recession Jitters Lead to More Careful Travel Spending

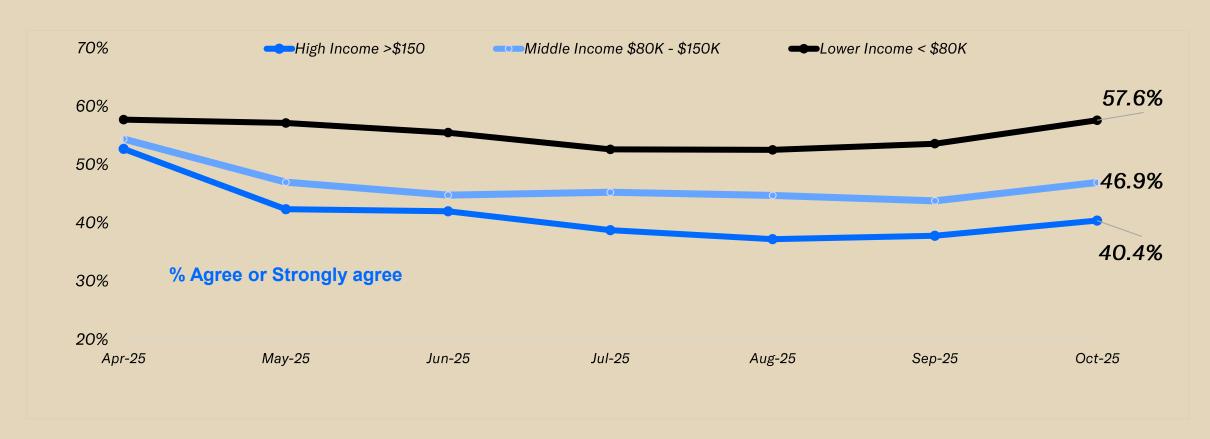
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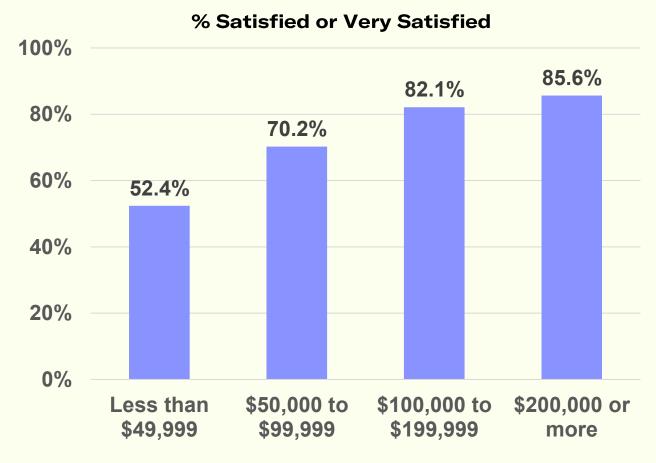
## Spending Restraint Strongest Among Travelers of Modest Means

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



## **Affluence + Life Satisfaction**

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



## MEGA EVENTS, 2026

A large-scale gathering that has the potential to significantly impact the host destination, both positively and negatively.

## FIFA World Cup, 2026

Next year's FIFA World Cup will be the first ever to feature 48 teams and be jointly hosted by three nations (the United States, Canada and Mexico).

- Toronto
- Vancouver
- Mexico City
- Guadalajara
- Monterrey

- Atlanta
- Boston (Foxborough area)
- Dallas (Arlington)
- Houston
- Kansas City
- Los Angeles (Inglewood)

- · Miami
- New York / New Jersey (East Rutherford area)
- Philadelphia
- San Francisco Bay Area
- Seattle

## **Base Camps!**

Official training and accommodation sites where each national team stays, practices, and prepares for its matches throughout the tournament.

- Alexandria, Virginia
- Atlanta, Georgia
- Birmingham, Alabama
- Boca Raton, Florida
- Boise, Idaho
- Guadalajara, Jalisco
- Dallas, Texas

- Mansfield, Texas
- Denton, Texas
- Fort Worth, Texas
- Frisco, Texas
- Houston, Texas
- Irvine, California
- Kansas City, Missouri
- Los Angeles, California

- Inglewood, California
- Newark, New Jersey
- Monterrey, Nuevo León
- San Jose, California
- Santa Barbara, California
- Goleta, California
- Spokane, Washington
- St. Louis, Missouri

- Tampa, Florida
- Tulsa, Oklahoma
- Vancouver, British Columbia
- White Sulphur Springs, West Virginia

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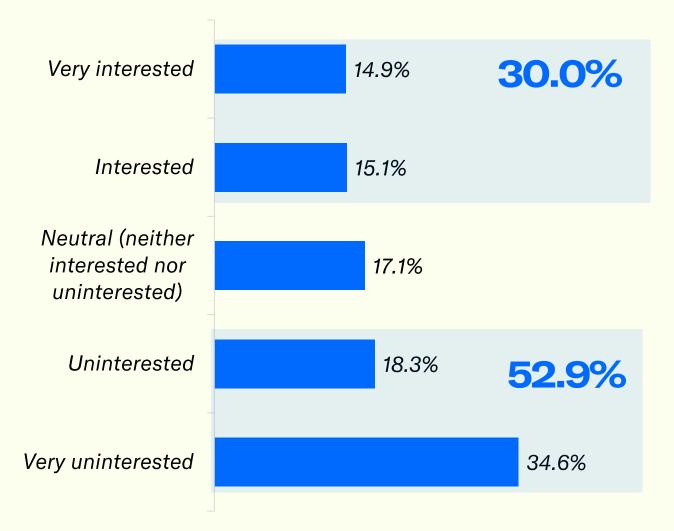
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# About 1-in-3 American Travelers Are Interested in Traveling to Enjoy the World Cup

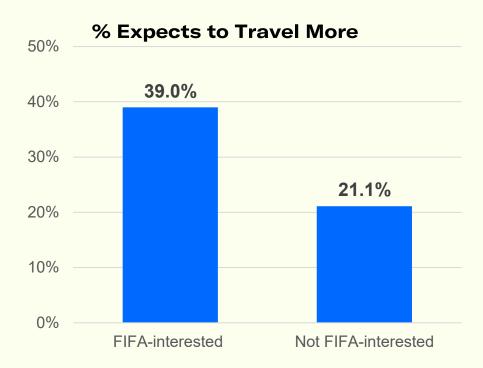
#### **Question:**

How interested would you be in traveling to enjoy the 2026 FIFA World Cup?

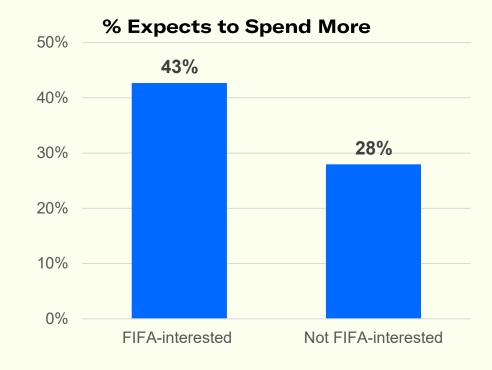


## FIFI Travelers Are Stoked to Travel and Spend on Travel Next Year.

**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?



**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?



### FIFI-Interested Travelers Are High-Value Travelers

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?

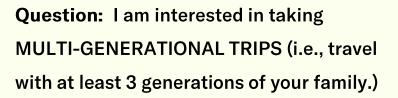
#### **Mean Maximum Travel Budget**

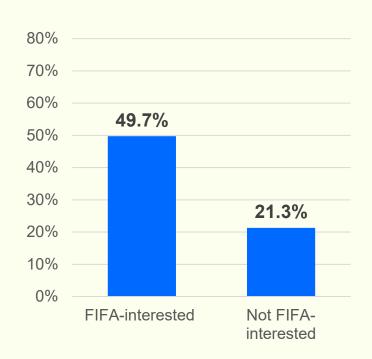


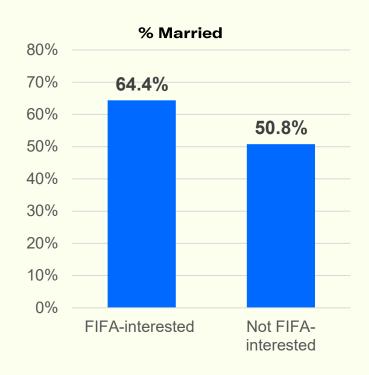
### FIFI Travel is Family Travel

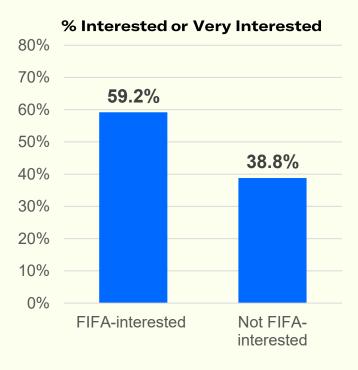
**Question:** Are you a parent to school-aged children who travel with you at least once a year?

**Question:** Which of the following best describes your current marital status?







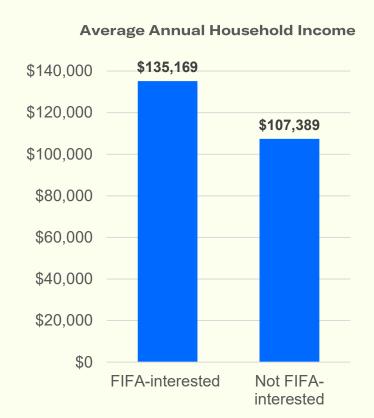


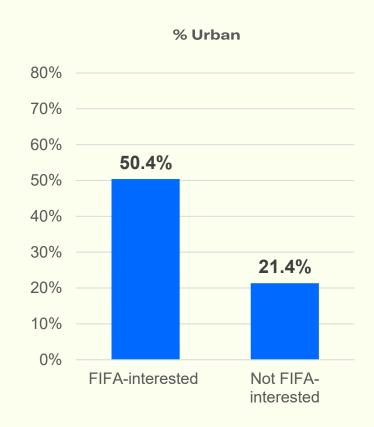
## FIFI Travelers Are Demographically Different

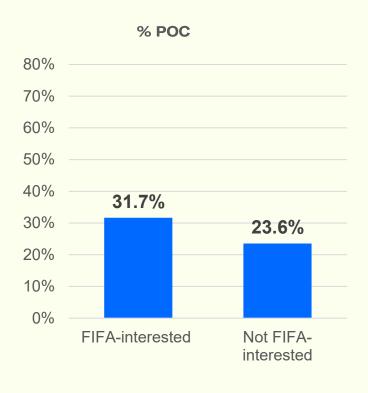
**Question:** Which best describes the combined annual income of all members of your household?

**Question:** Which best describes where you live?

**Question:** Which best describes your ethnicity?

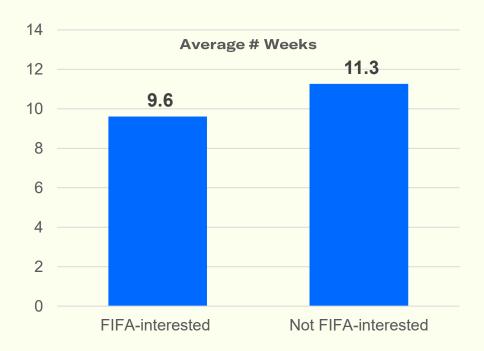




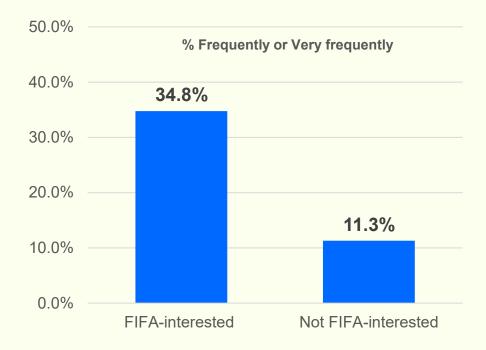


#### FIFI Travelers Are Spontaneous

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



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



## Focus Your Marketing

Understand the Intersection of FIFA Travelers and Your Visitors



The State of the American Traveler Insights Explorer

Who they are. Where they live. How to Reach Them.

## 2026 Route 66 Anniversary

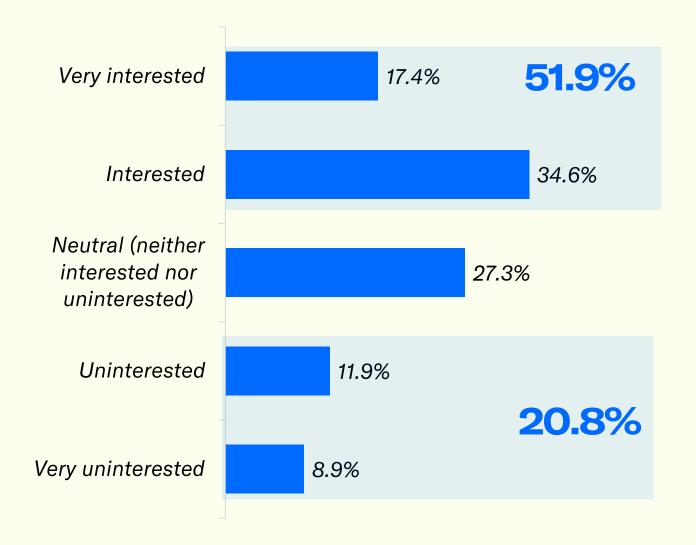
The Route 66 Centennial will celebrate 100 years of America's legendary highway with events across all eight states along its path (from Illinois to California) including dozens of festivals, car shows, parades, restoration projects, and official celebrations.



## Interest In the Anniversary is High

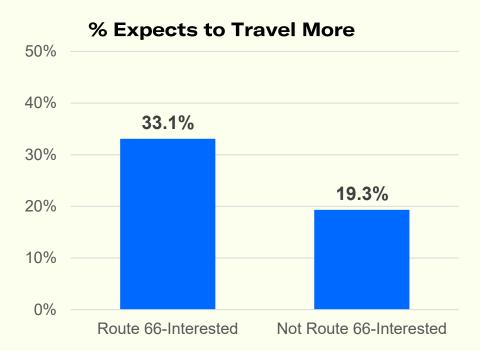
#### **Question:**

How interested would you be in traveling to enjoy these (Route 66 Anniversary) opportunities?

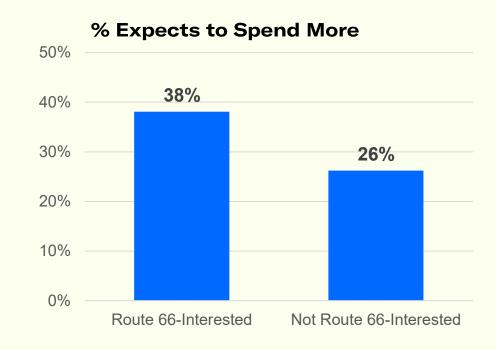


# Route 66 Interested Travelers Are Highly Optimistic About Travel Next Year (but Slightly Less So Than FIFA Travelers.)

**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?



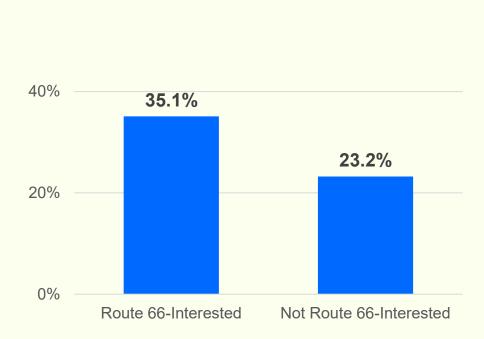
**Question:** In the NEXT 12 MONTHS, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period?



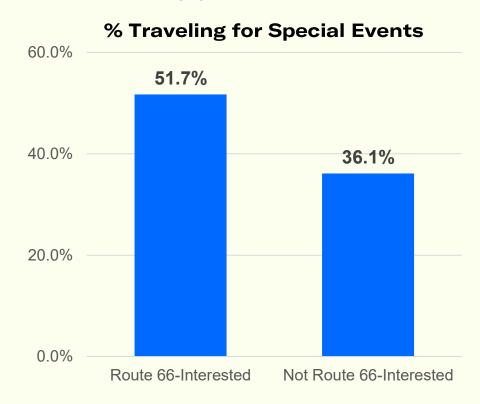
#### Route 66-interested Travelers Are Events-Oriented Travelers

**Question:** In the PAST 12 MONTHS, have you traveled specifically to attend a sporting event?





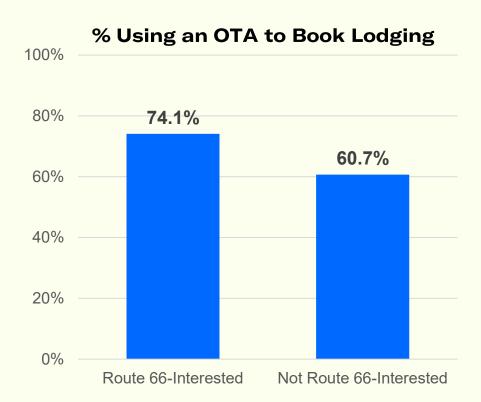
**Question:** In the PAST 12 MONTHS, have you traveled (50-miles or more from your home) specifically to attend a special event of any type?



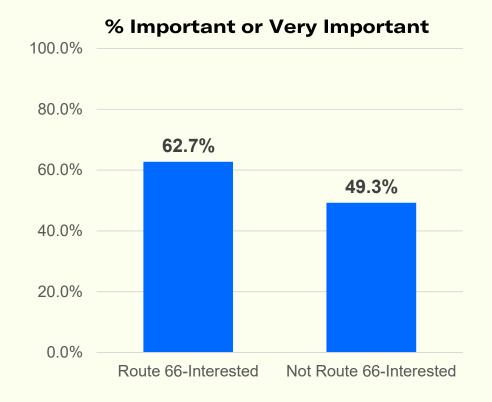
60%

# Route 66-interested Travelers Book With OTAs and Are Into Rewards Programs.

**Question:** In the PAST 12 MONTHS, which of these websites do you recall using to book any travel lodging?

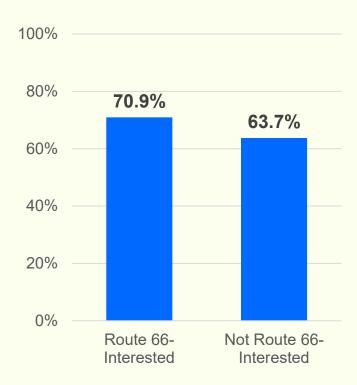


**Question:** How important are travel rewards programs (hotels, airlines, etc.) to how you generally plan your leisure travels?

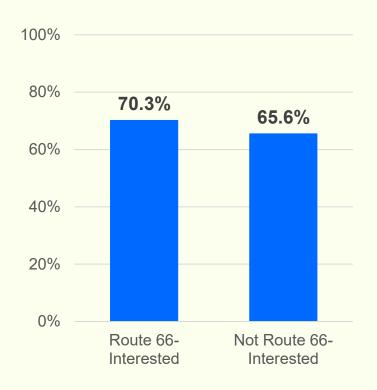


### This Crossed the Gamut of Rewards Programs

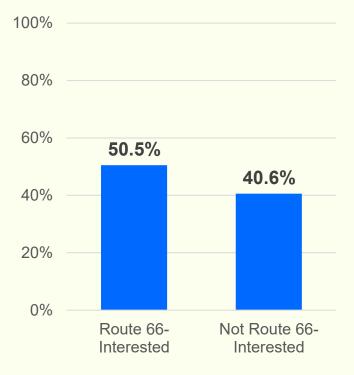
**Question:** Which of these HOTEL REWARDS PROGRAMS do you currently use?



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

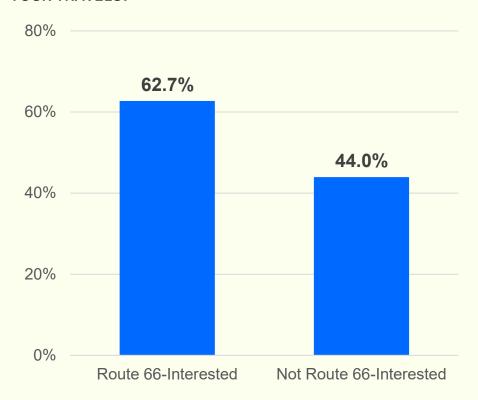


**Question:** Have you used CREDIT CARD POINTS OR REWARDS for travel-related purchases within the PAST TWELVE (12) MONTHS?

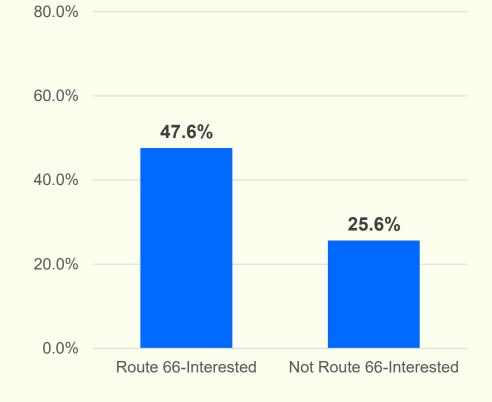


## Route 66-interested Travelers Are Social Media and DMO Users

**Question:** In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS?

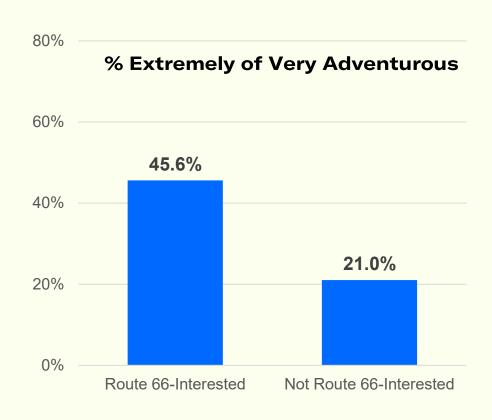


**Question:** In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel?



## Route 66-interested Travelers Are Adventure Seekers

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



84.4%

say they are at least moderately adventurous

## Focus Your Marketing

Understand the Intersection of Route 66 Travelers and Your Visitors



The State of the American Traveler Insights Explorer

Who they are. Where they live. How to Reach Them.

## **AMERICA**



On July 4, 2026, our nation will commemorate and celebrate the 250th anniversary of the signing of the Declaration of Independence.

#### IN CONGRESS, July 4, 1776.

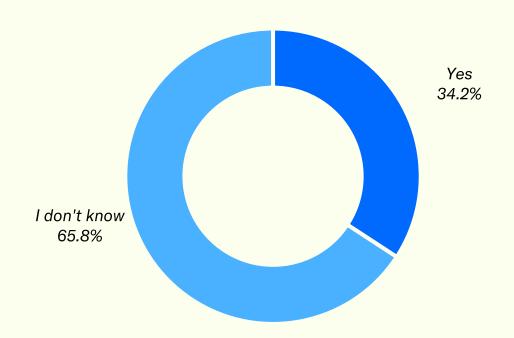
#### The unanimous Declaration of the thereen united States of Honerica.

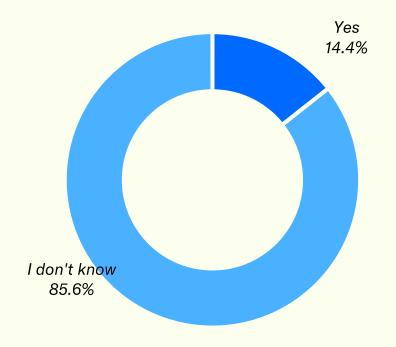
Syman Stall. Geo Walton. Bot Fran Painte

## America 250-interested Are a Significant Market

**Question:** Prior to taking this survey, which of the following upcoming events have you heard of?

**Question:** Which of the following upcoming events are you interested in traveling to attend?







# Does Your CEO Have a Burning Question?

Join Future Partners' Year End Omnibus

- Audience: American General Traveling Population
- Timing: Fields in December, Results Delivered by EOY
- Pricing: 5 Questions for \$5k (Limitations apply)









# Let's keep the conversation going



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Livestream Calendar

# Future Partners

# Opportunity powered by insight.