

Future Partners

January 2026

A night scene of a travel van and tents in a field under a starry sky with the Milky Way. The van is a yellow Citroën Relay, and there are two tents, one white and one blue. A small fire is visible in the background. The sky is dark with many stars and the Milky Way galaxy visible. The foreground is a grassy field.

**The State of the
American Traveler**

Opportunity powered by *Insight*

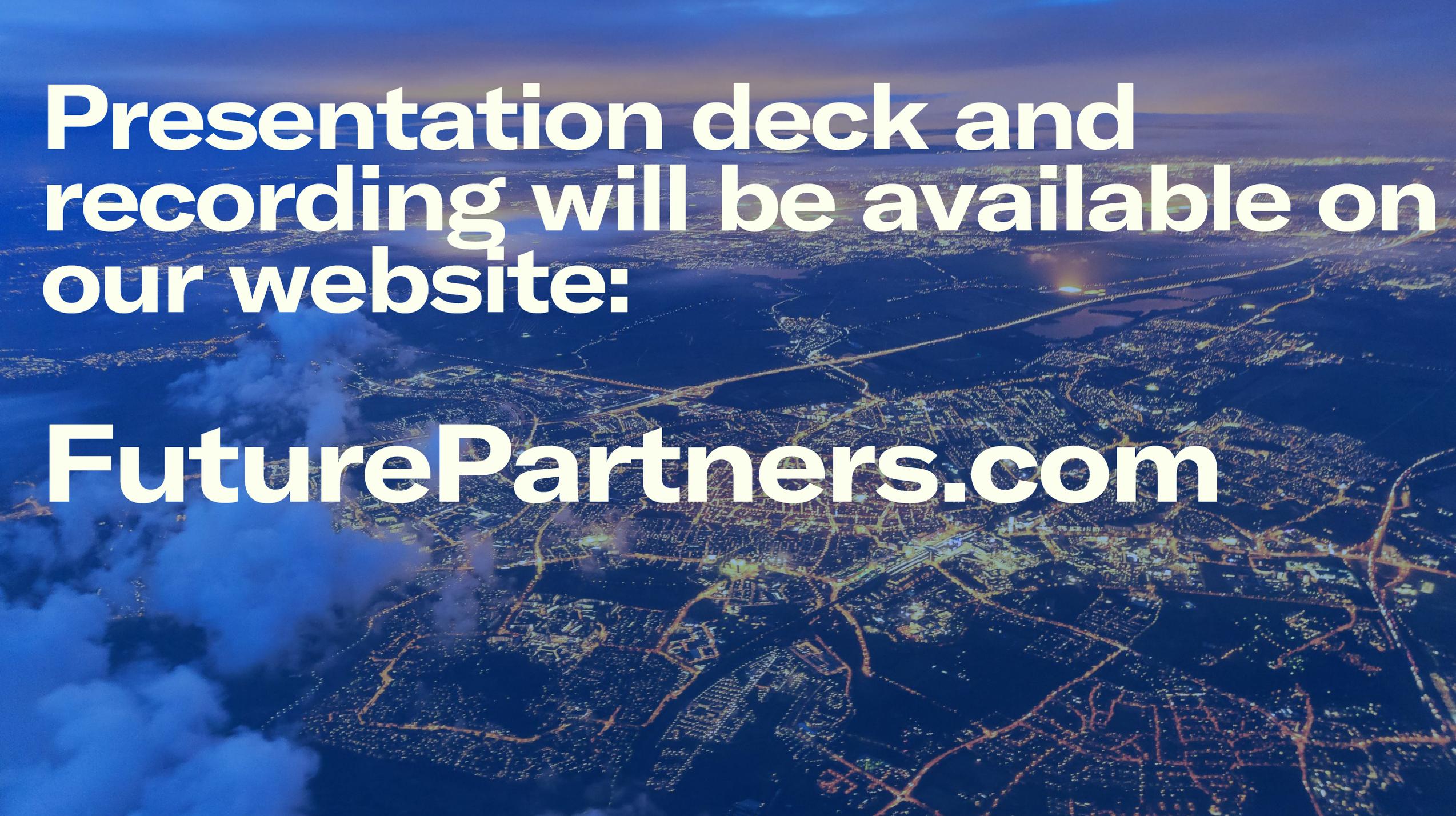
Future Partners

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

An aerial night view of a city, likely Los Angeles, with city lights and a prominent blue overlay. The text is overlaid on the top left and center of the image.

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

FuturePartners.com

Today



**Update on American Travel
Sentiment**



**Crowdsourcing
Predictions for Travel in 2026**

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
- Survey collected: [December 15-26, 2025](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region

United States Census Regions



*Our Hearts Are With
Minneapolis*



Travel Sentiment



In Retrospect: 2025

American travelers proved remarkably resilient—they kept planning, kept budgeting, and kept dreaming—but they did it all with one hand on their wallet and one eye on the economy.

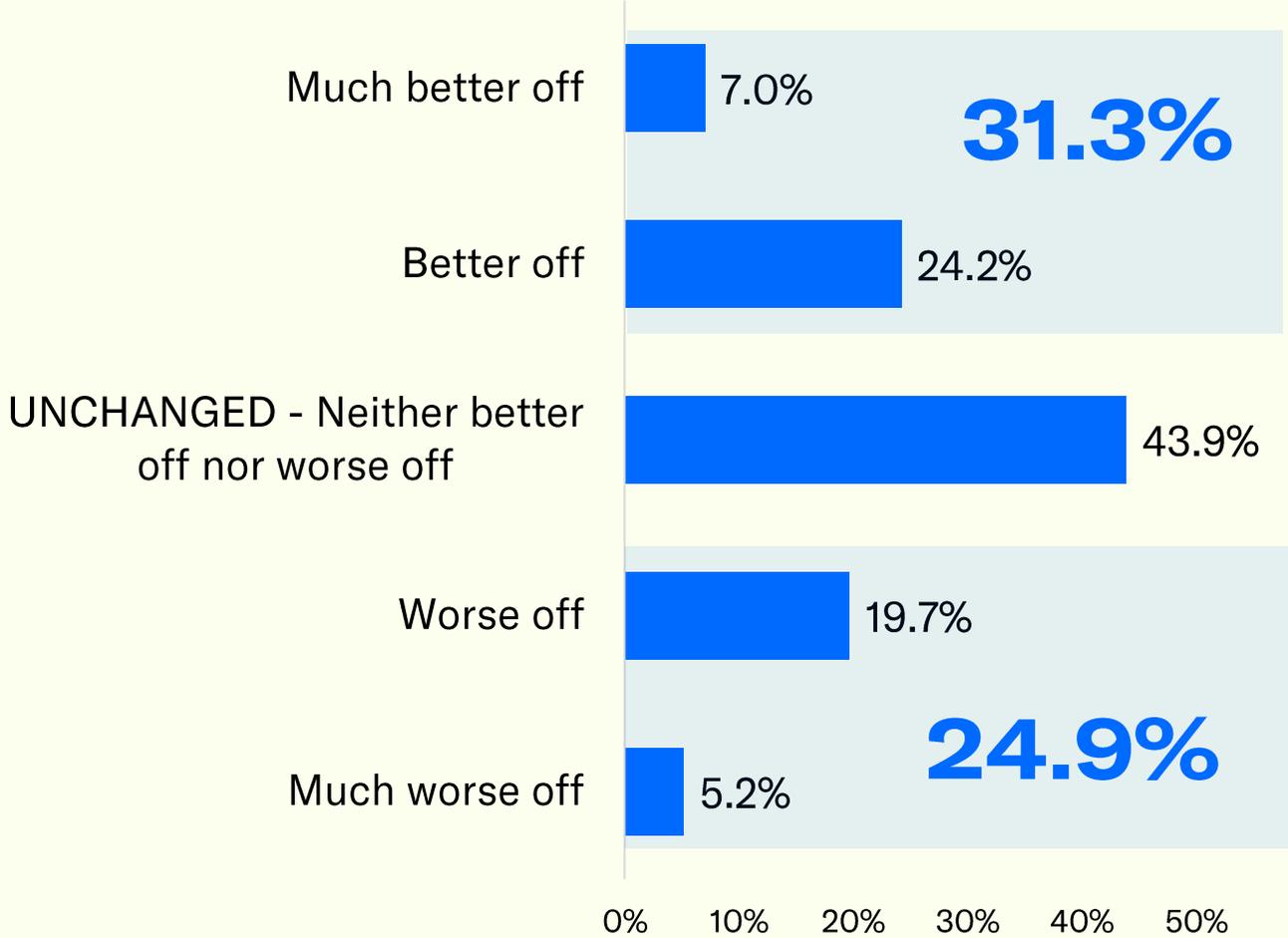
January 2026

American travelers are starting the new year with measured resolve rather than boundless optimism. Travelers are holding their ground financially and continuing to prioritize travel, but expectations for the year ahead are notably more subdued than they were at the start of 2025.

Financial Sentiment Softens, but Stability Holds

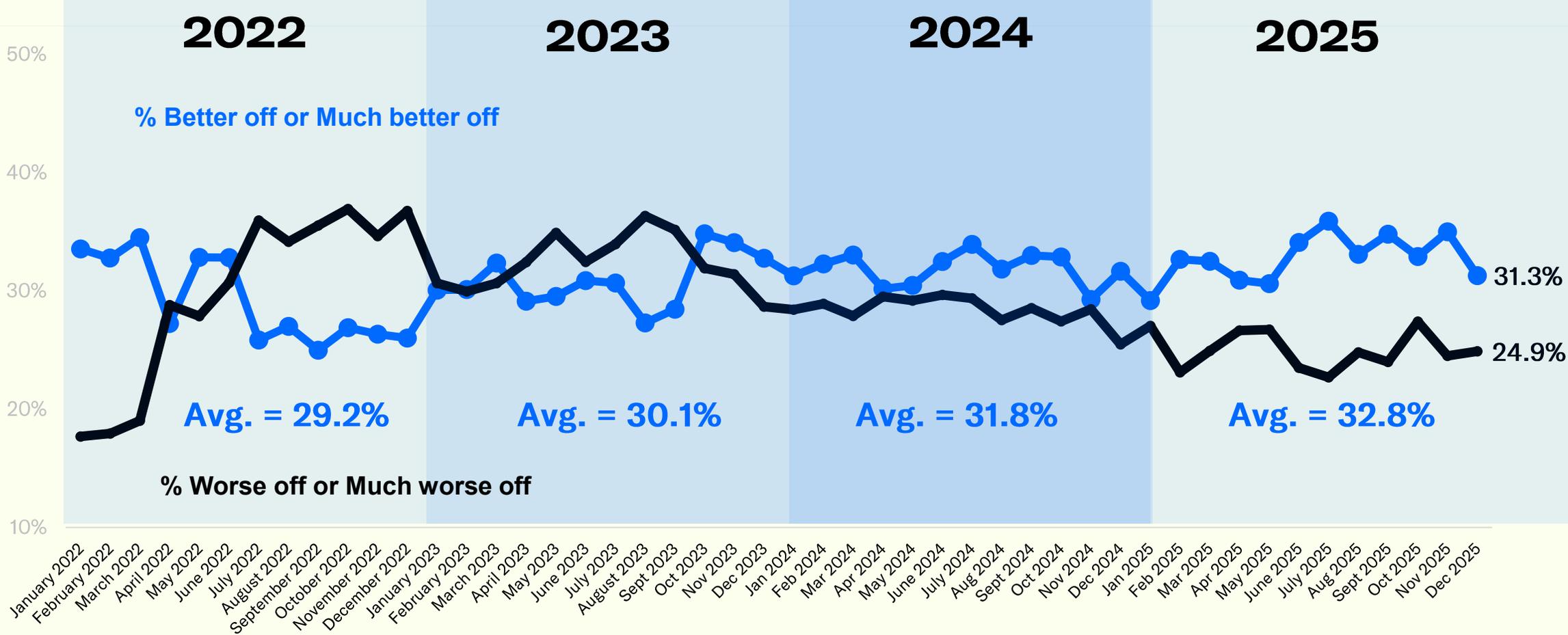
Question:

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



Despite a Recent Drop, Financial Sentiment Has Gradually Improved since 2022

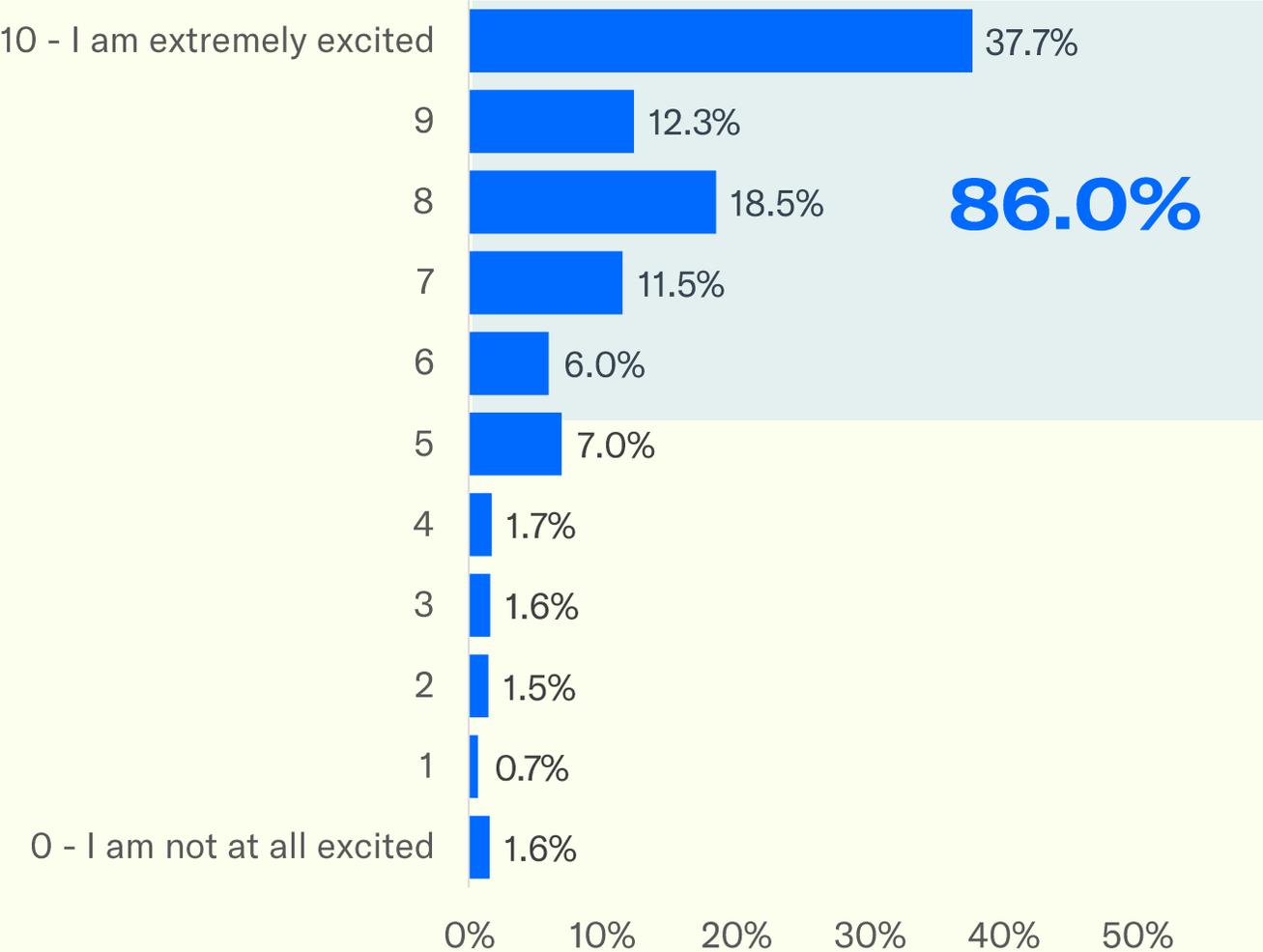
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Americans Are Still Very Excited to Travel

Question:

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



The New Normal for Travel Excitement is High. Some Recent Declines Seen.

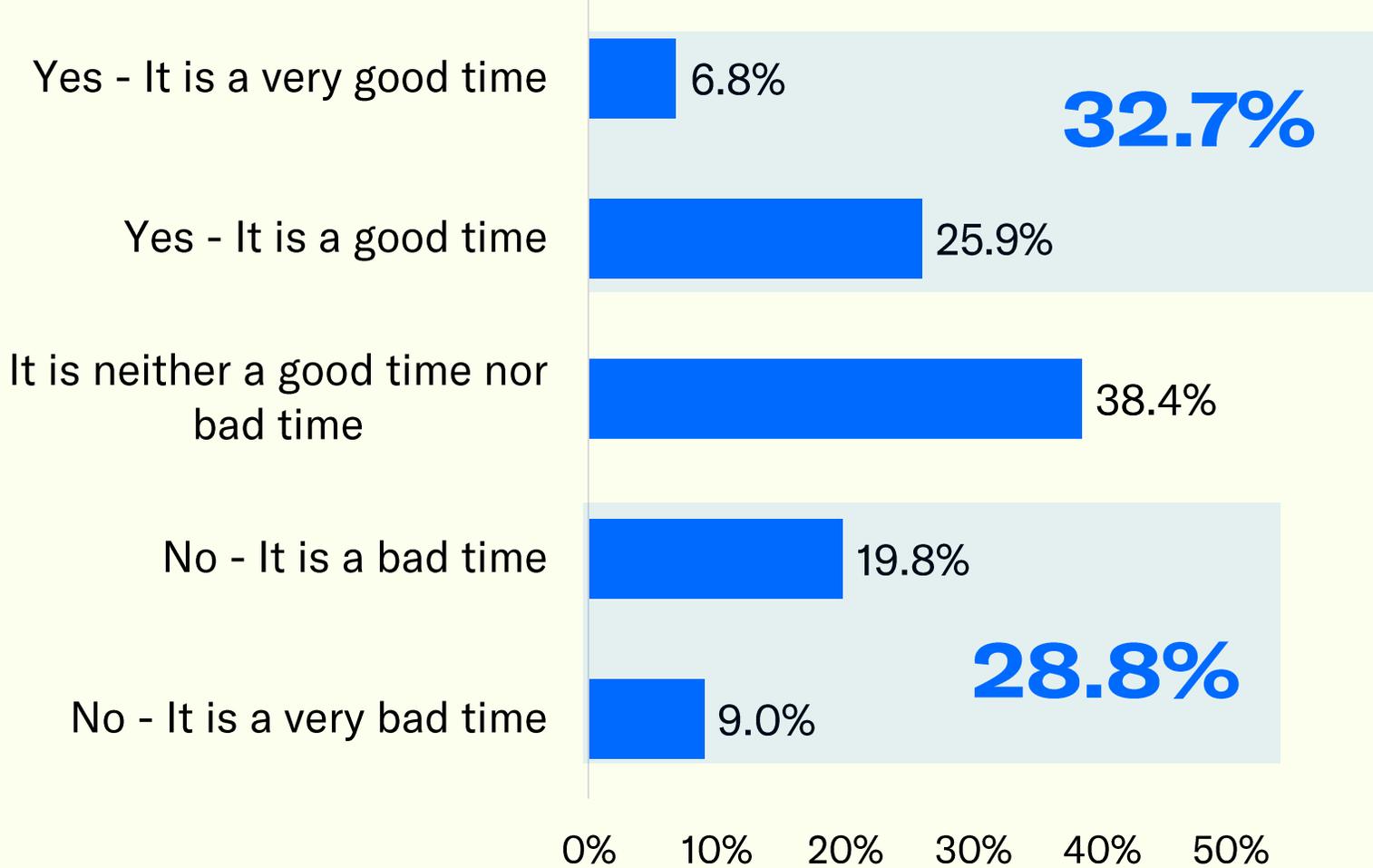
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Travel Spending Confidence Pulls Back

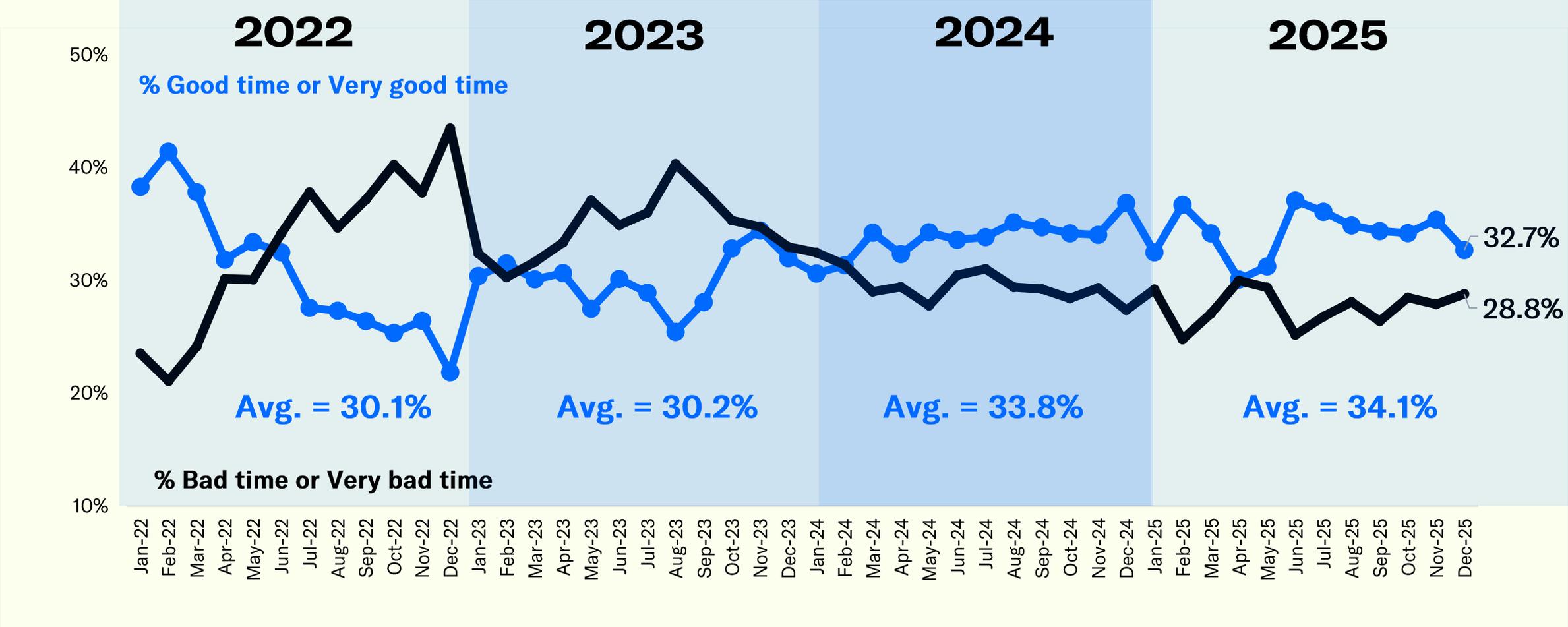
Question:

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 Reached a Modest 4-Year High

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?

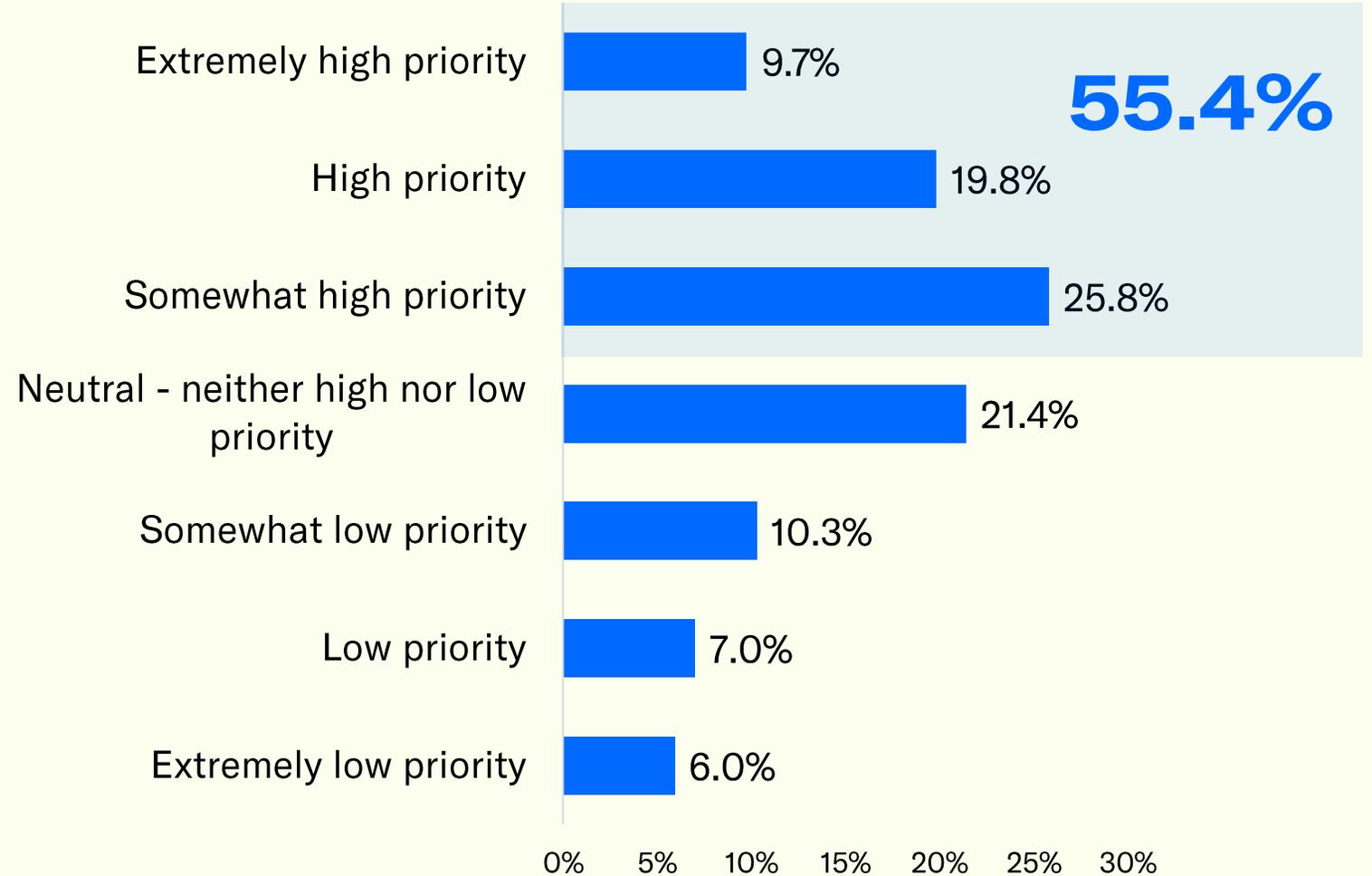


Travel Remains a Core Household Priority

Question:

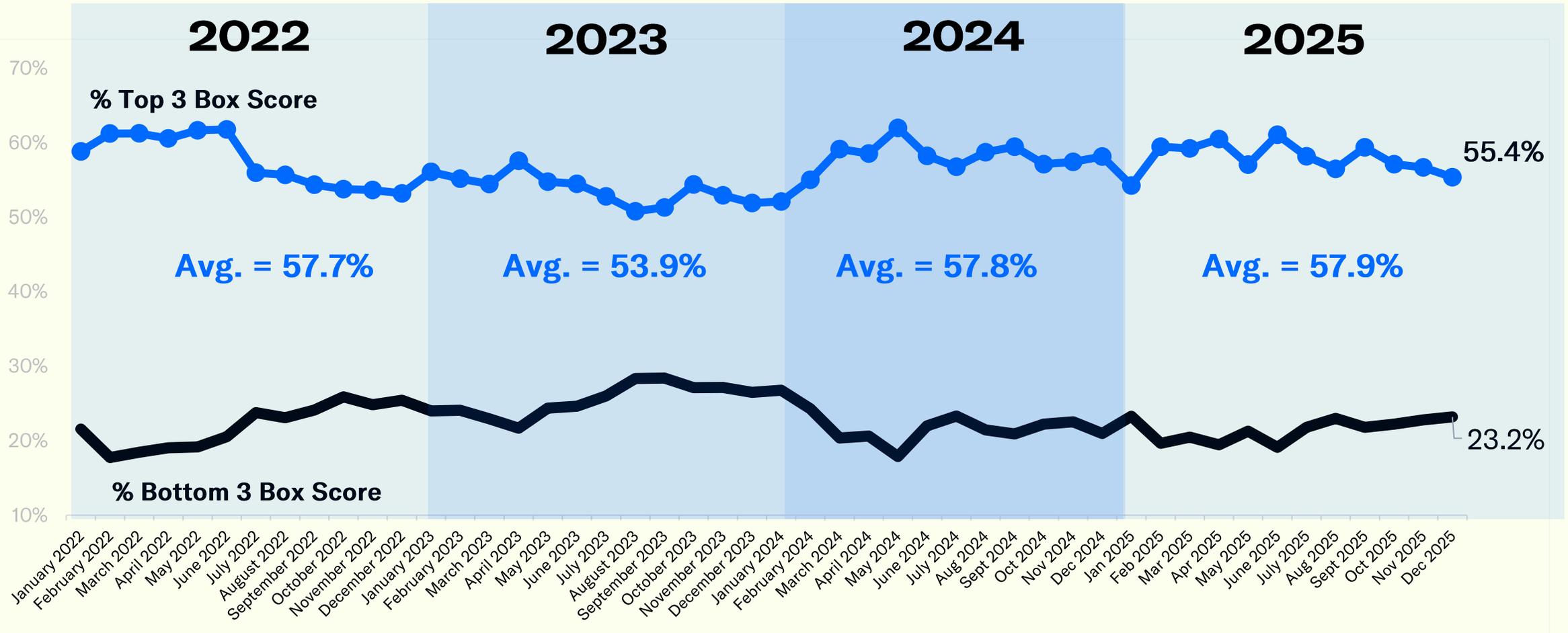
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n)
_____.



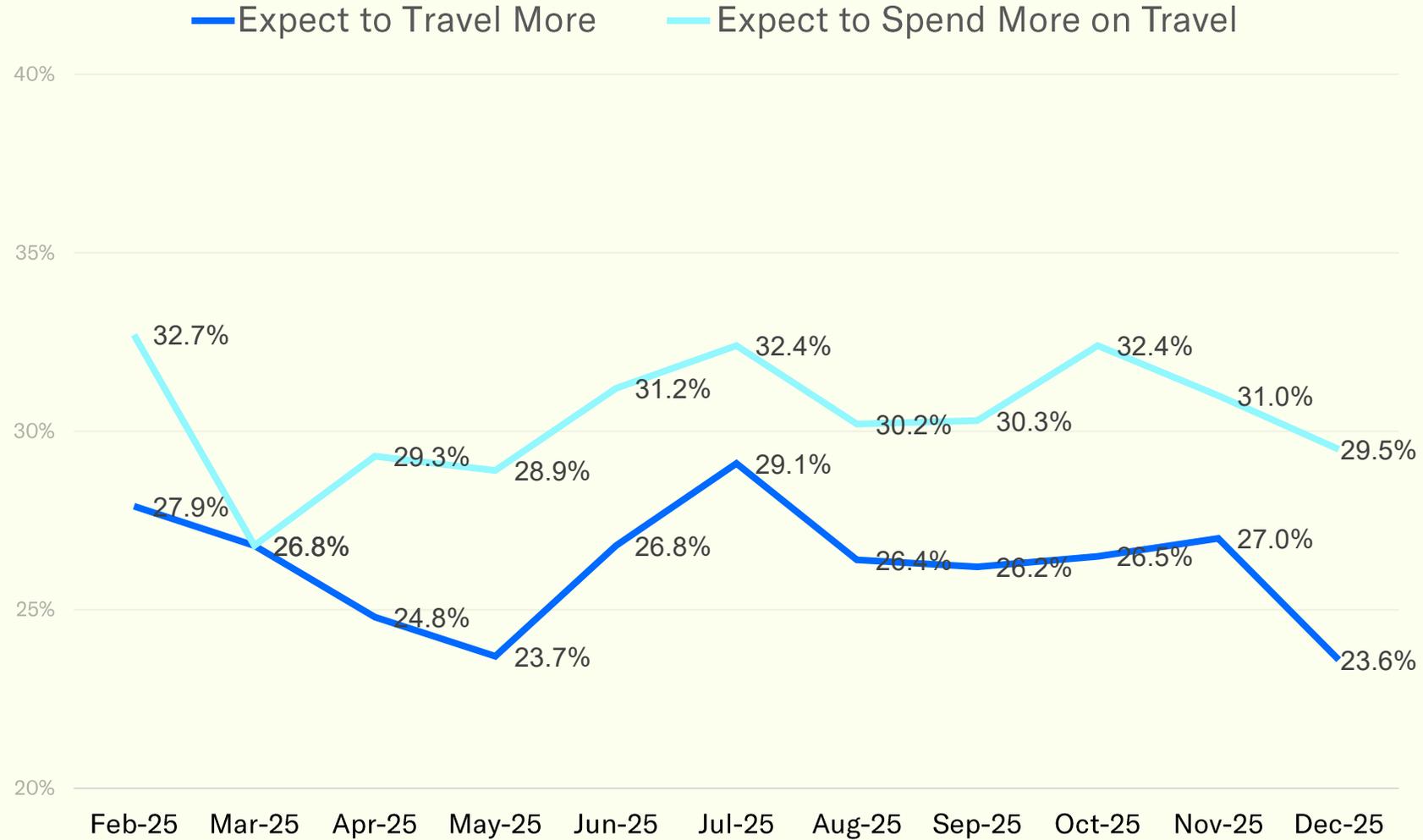
Travel Remains a Core Household Priority

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.



Optimism about Increased Trip Volume and Spend is Muted Relative to a Year Ago

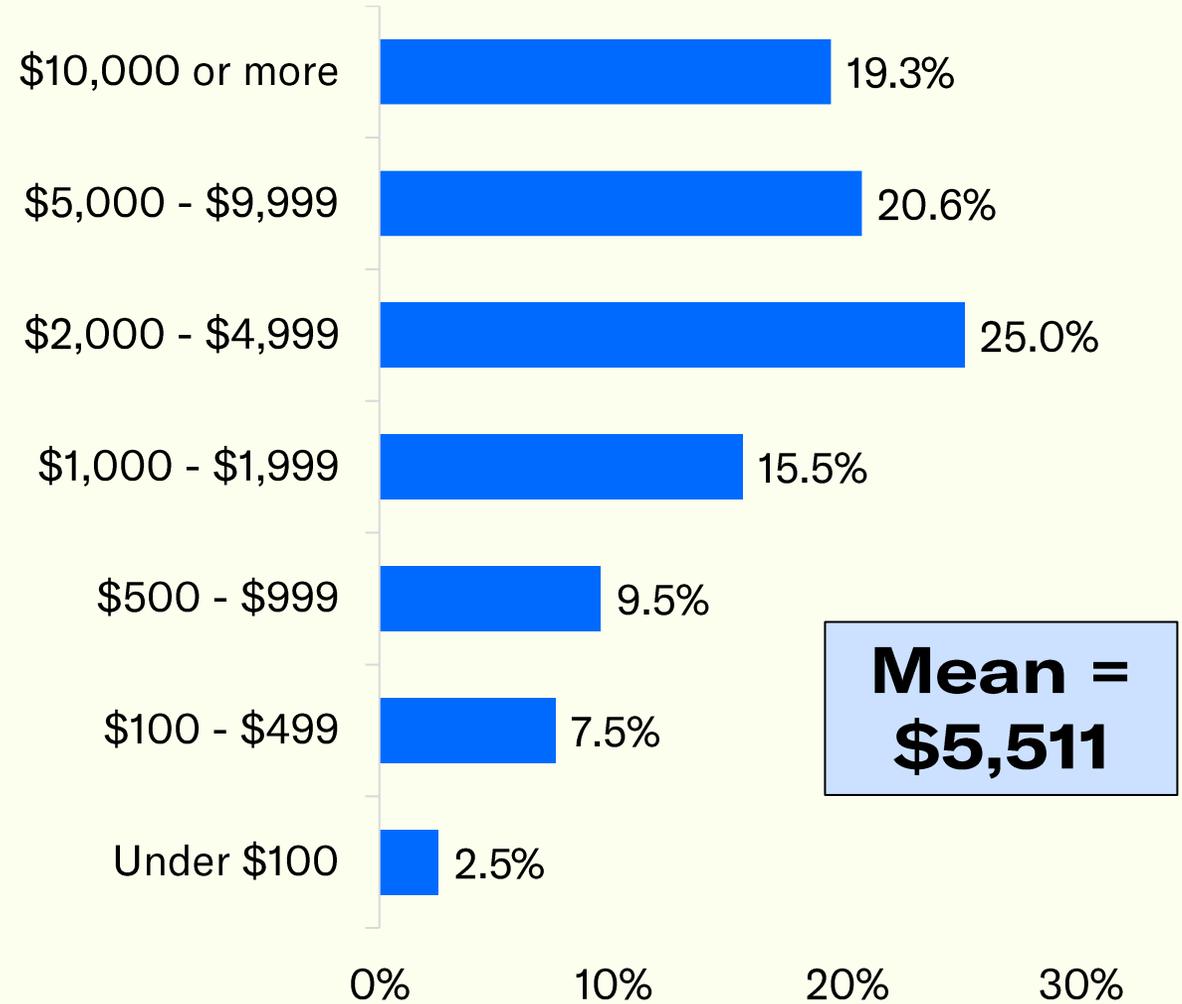
% of American Travelers Expecting to Travel More and Spend More on Travel



The Average Anticipated Travel Budget is \$5,511

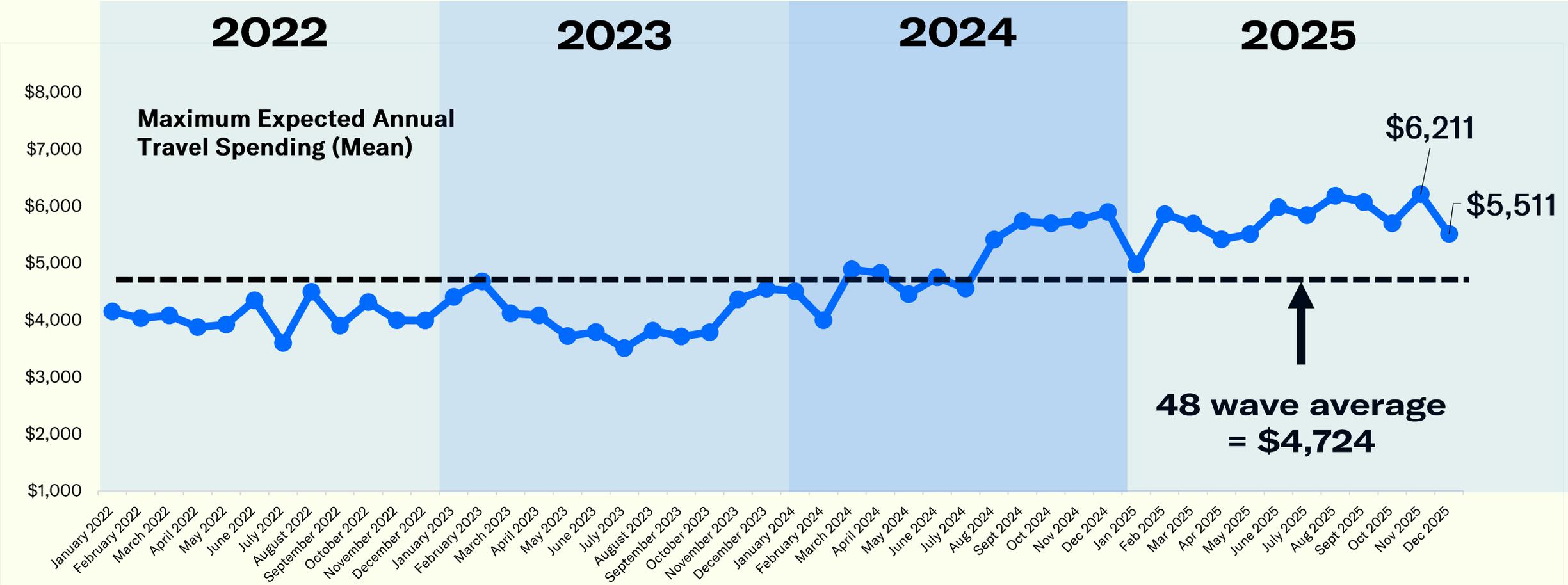
Question:

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?



Anticipated Travel Budgets Recalibrate

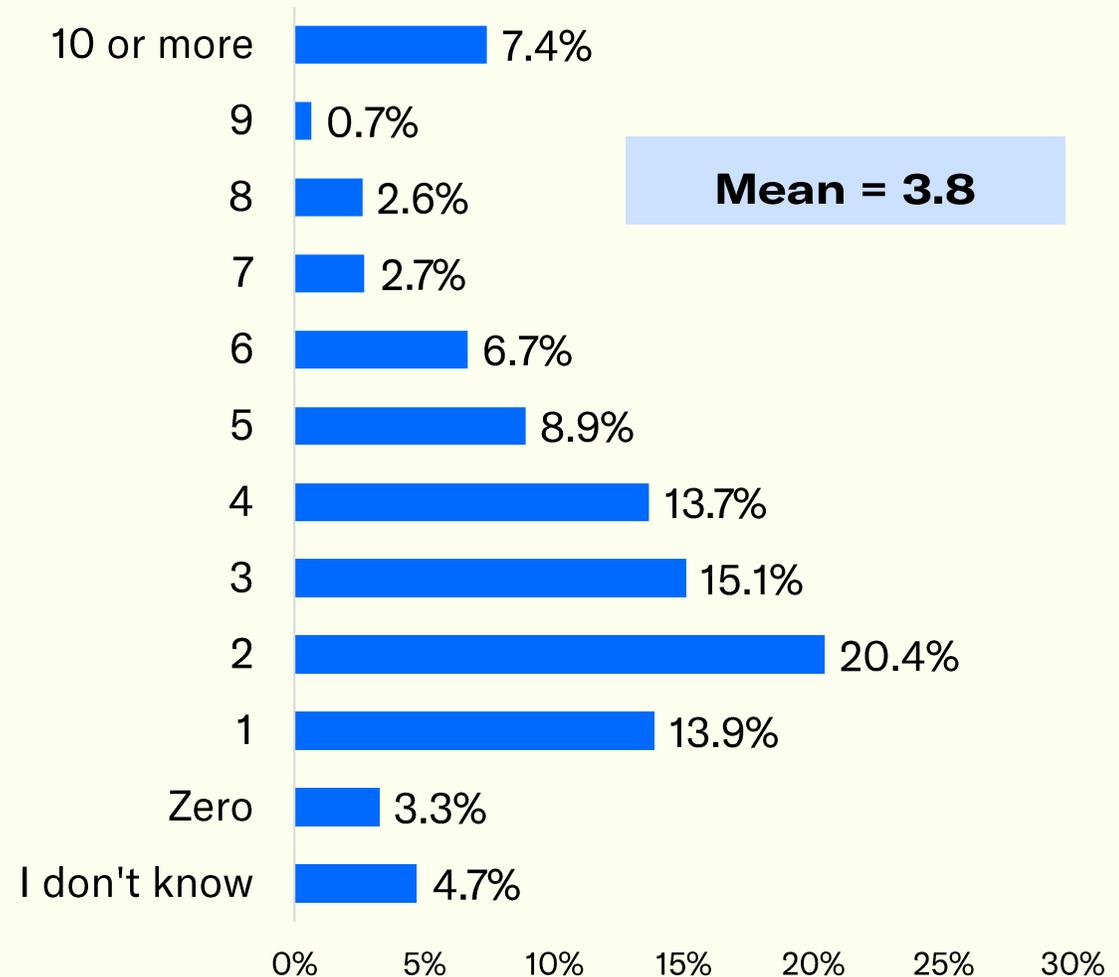
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



The Average American Traveler Expects to Take 3.8 Leisure Trips in 2026

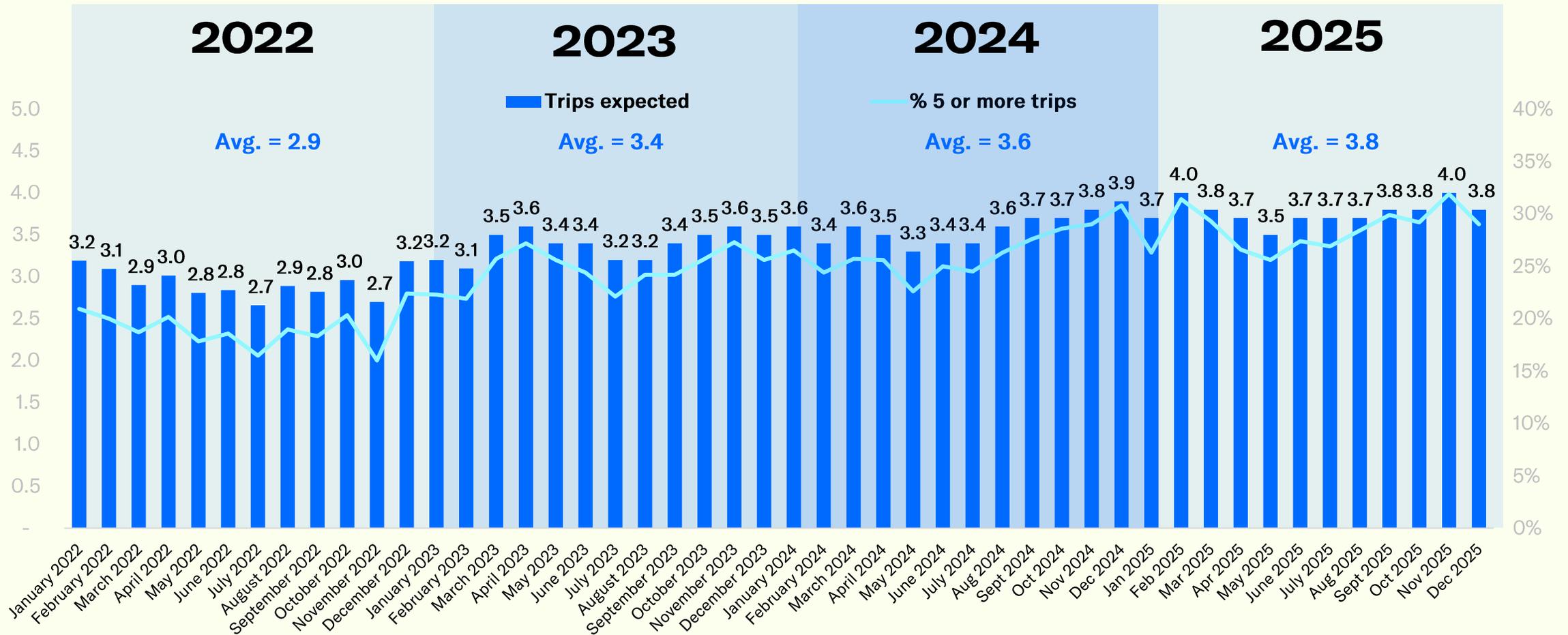
Question:

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



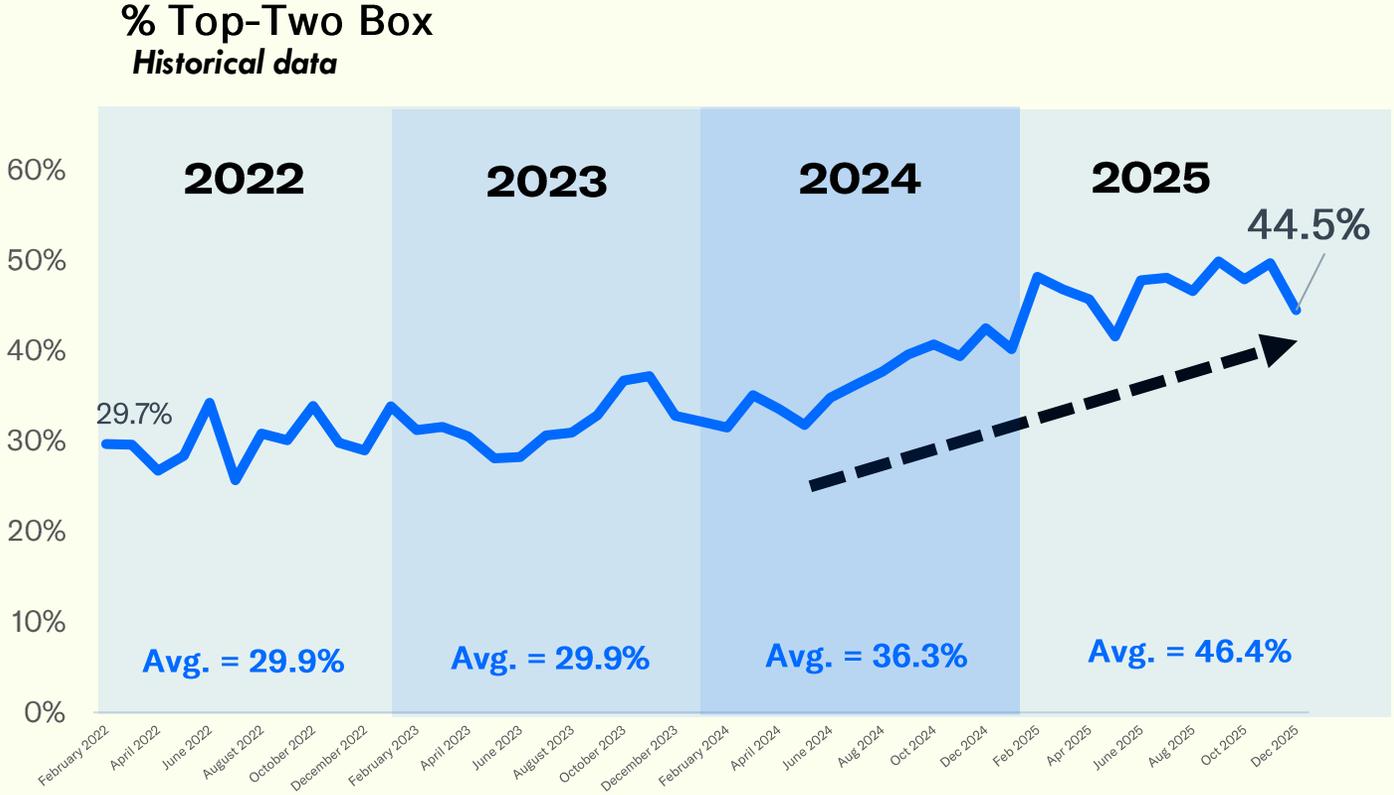
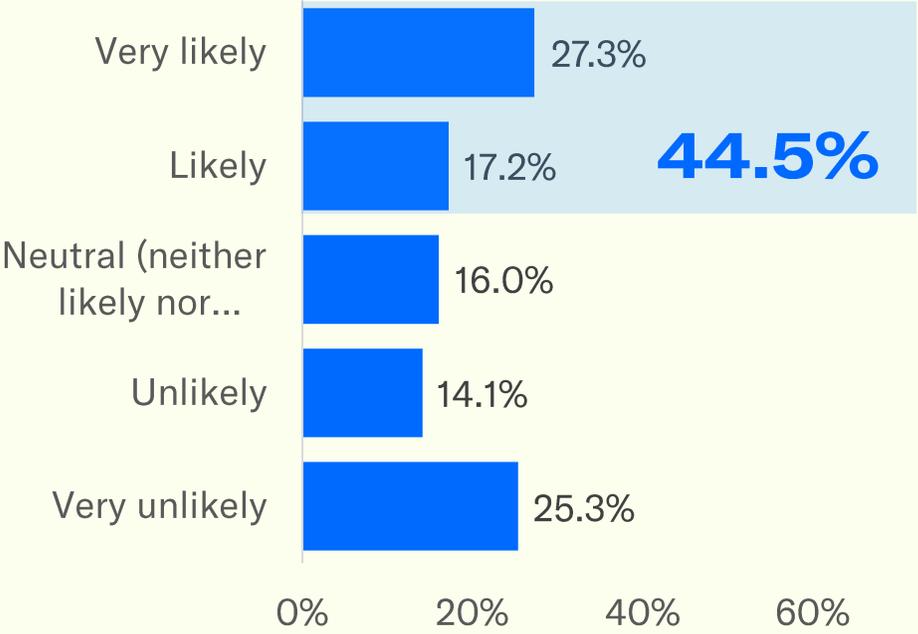
Expected Trip Volume Drops After Reaching a High Last Month

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?

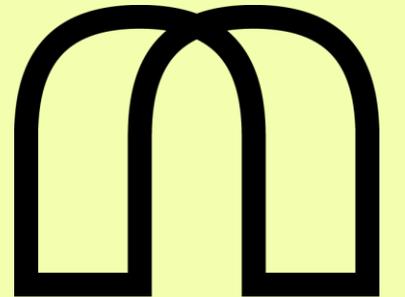


International Travel Intentions Drop, But Remain Strong

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



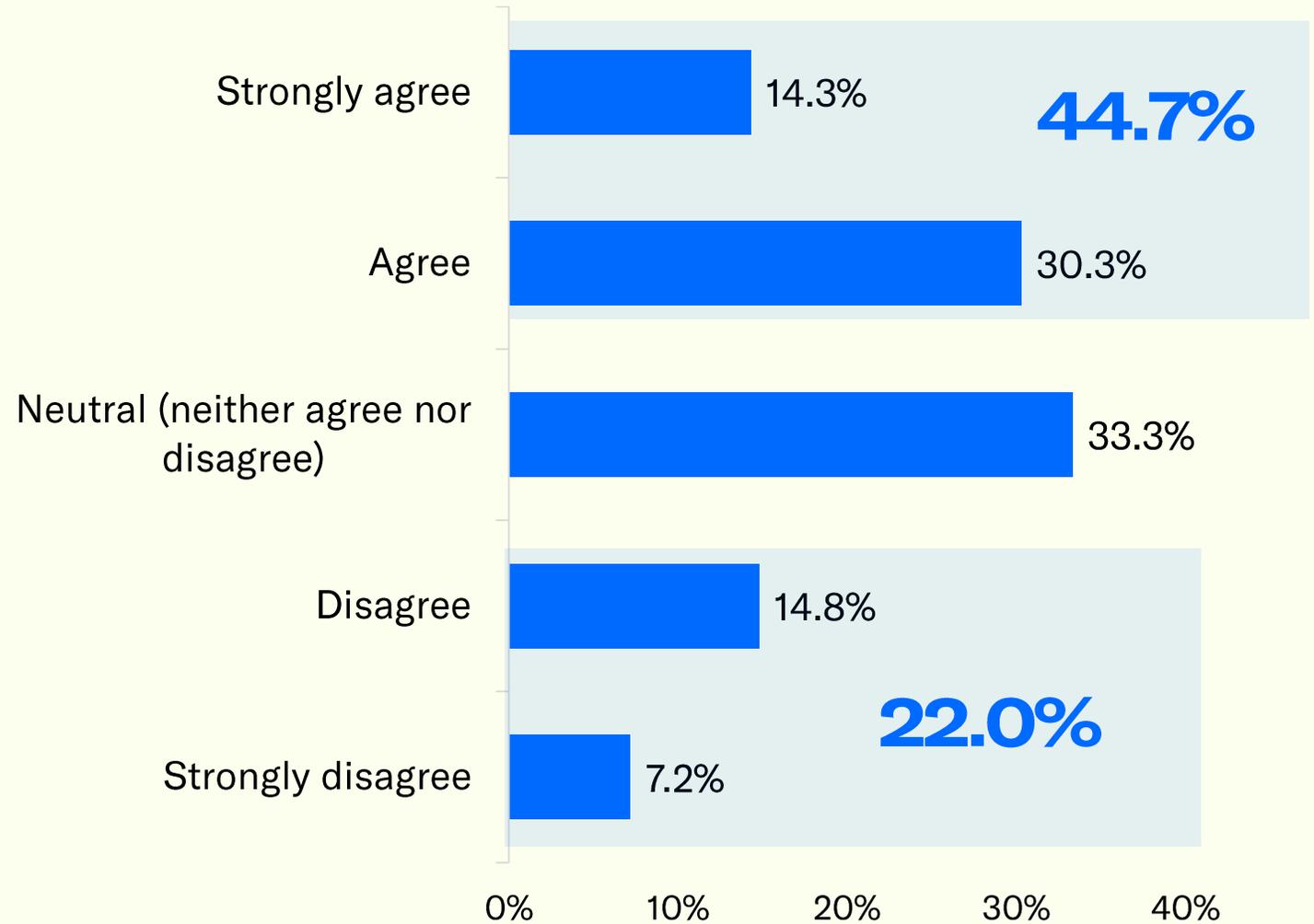
How are Americans Feeling About the Future of the Economy?



Twice as many American Travelers have Recession Anxiety than Don't

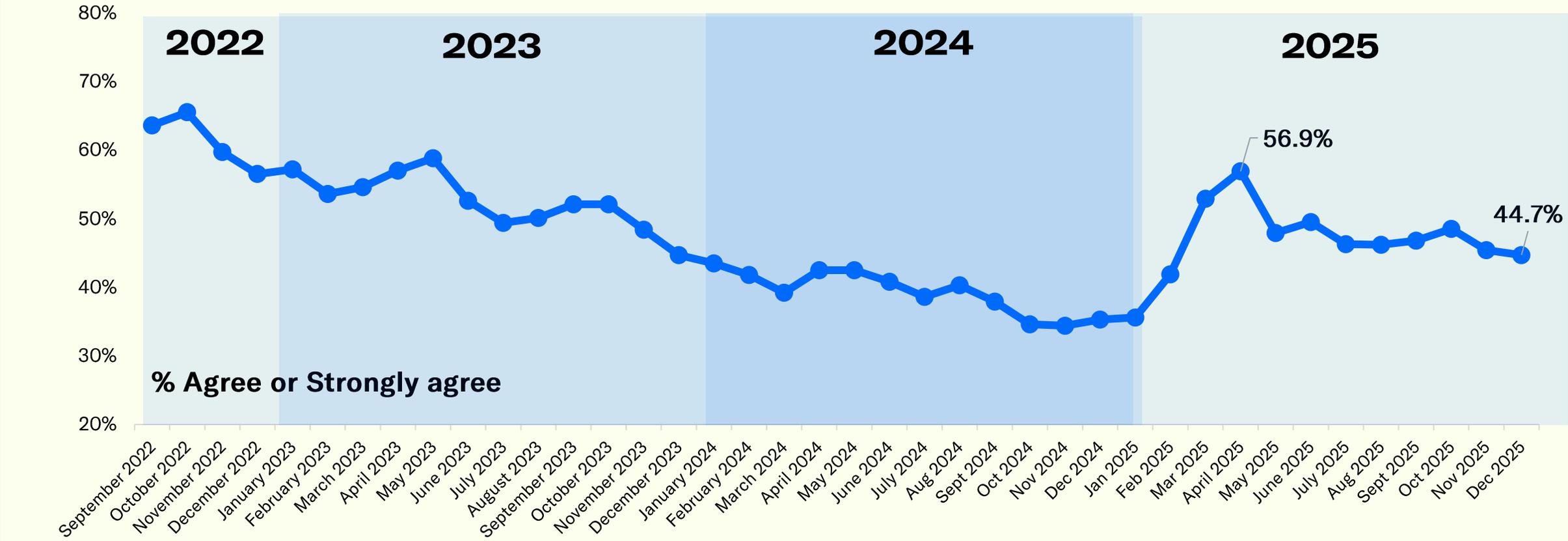
Statement Agreement:

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



Recession Fears Remain Elevated—but Are No Longer Escalating

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



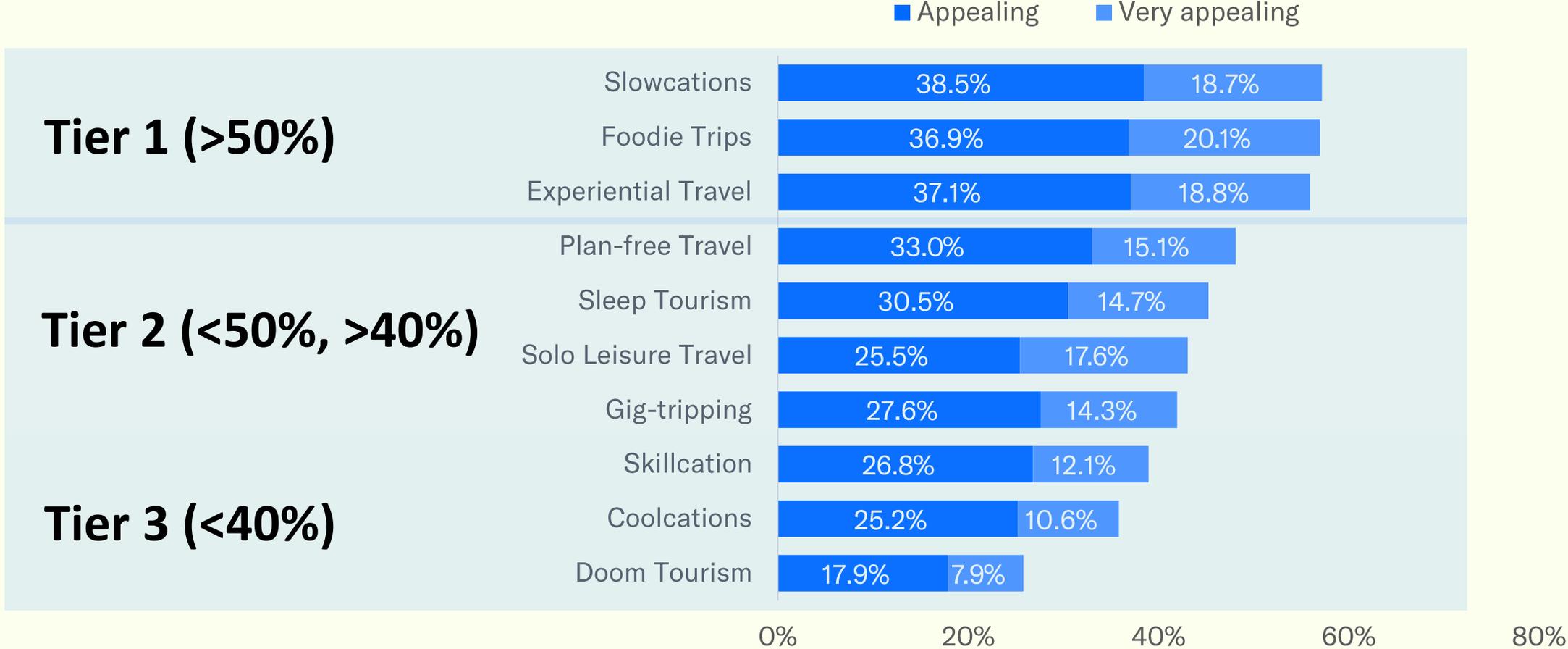
In Summary

*American travelers remain
committed but cautious.*

Emerging Trends Shaping Travel in 2026



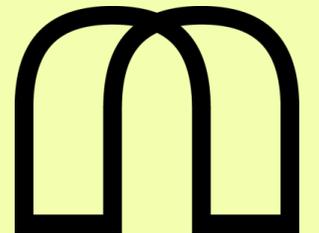
In terms of mass appeal, slowcations, foodie trips and experiential travel top the trends we studied heading into 2026



Travel Nostradamus



Crowdsourcing Predictions for Travel in 2026



Scale

- Certain – 100% chance
- Extremely likely
- Likely
- Neither likely nor unlikely
- Unlikely
- Extremely unlikely
- Impossible – 0% chance



Prediction #1

In terms of **traveler concerns** about high prices, 2026 will be another stressful year.



Inflationary pressure on travel costs

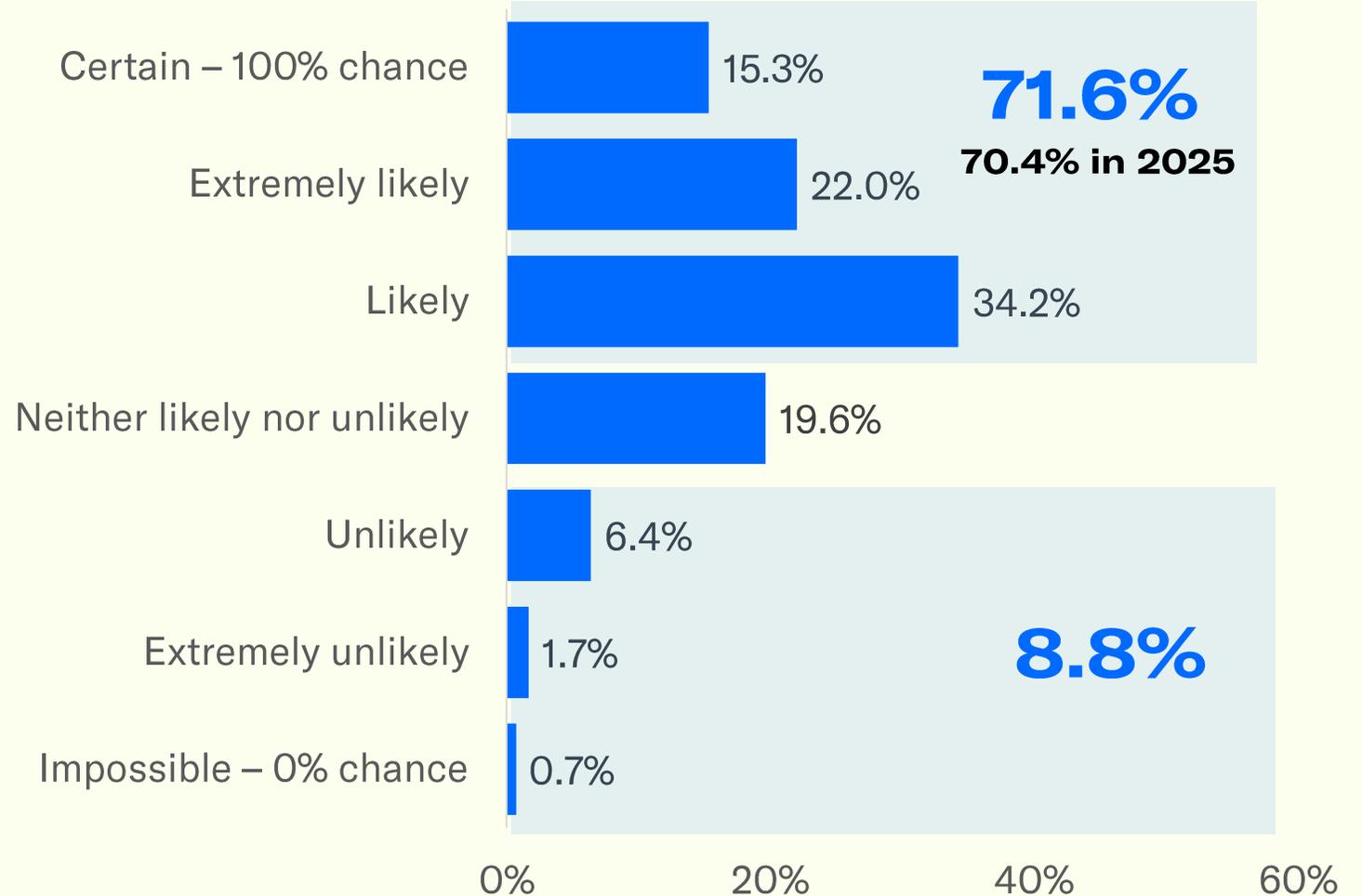
Statement:

Inflation will drive travel costs up significantly.

As close to unanimity as we get, nearly 3-in-4 travelers expect significant travel cost increases in 2026.

Statement:

Inflation will drive travel costs up significantly.





Budget-friendly destinations

Statement:

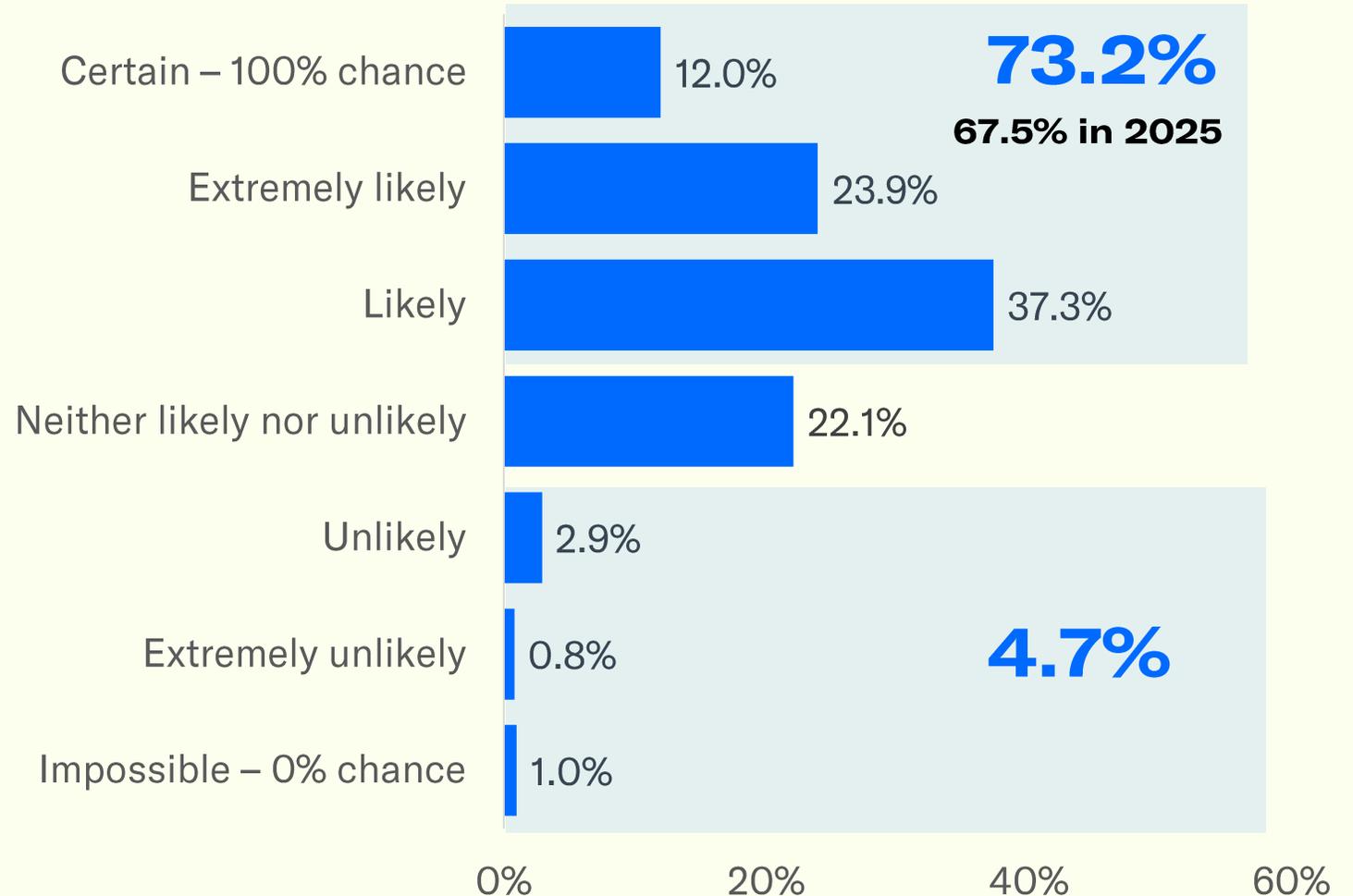
Budget-friendly destinations will become more popular in 2026.

Future Partners

The high cost of travel weighs heavily on travelers' minds, with 3-in-4 seeing **budget-friendly travel** as growing in 2026.

Statement:

Budget-friendly destinations will become more popular in 2026.





The rise of dupes

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2026, visiting dupes will grow in popularity.

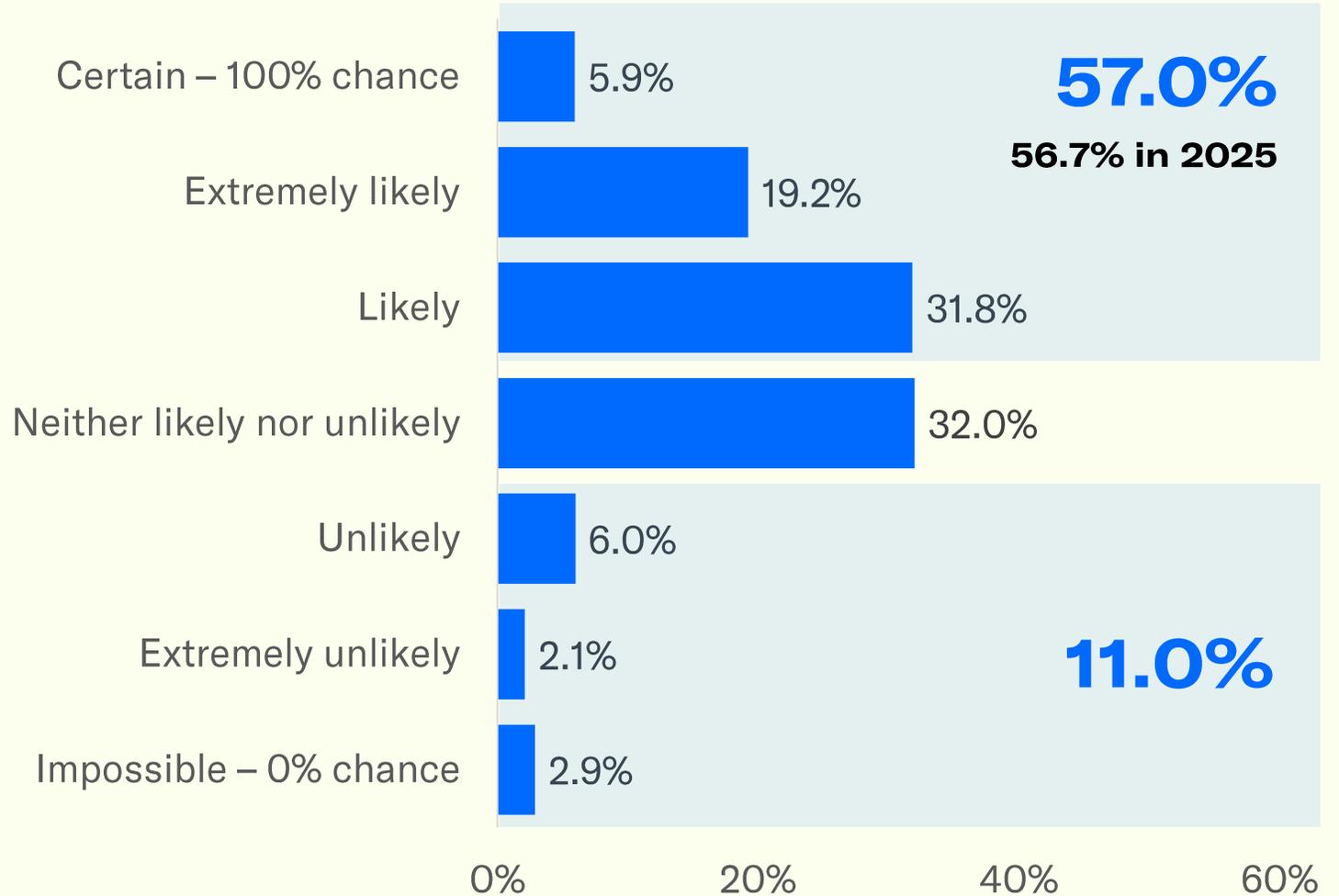
Future Partners

Nearly 6-in-10 travelers see dupes as growing in popularity.

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

In 2026, visiting dupes will grow in popularity.





The increasing popularity of off-the-beaten-path destinations

Statement:

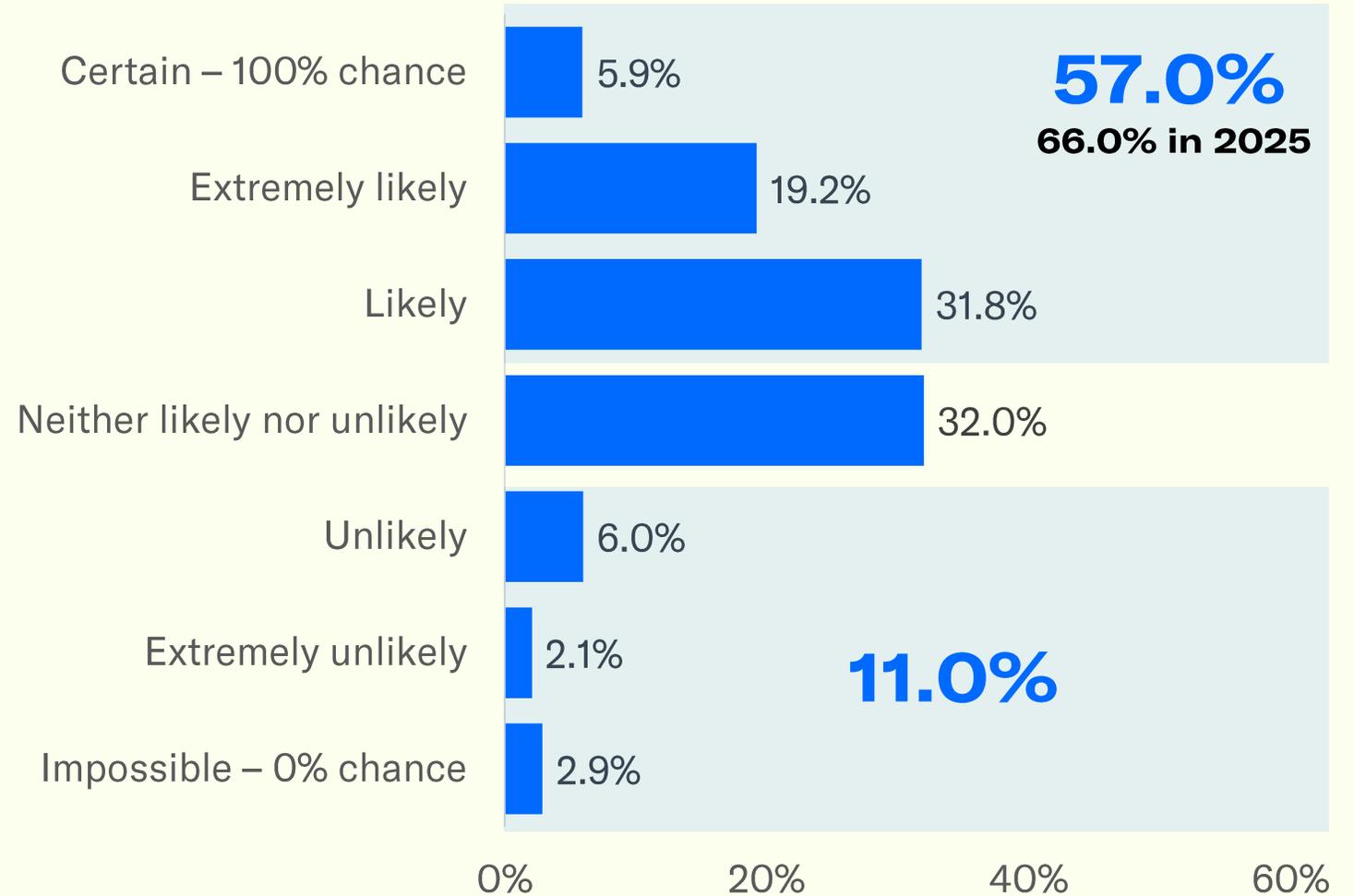
Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.

Future Partners

Although down from last year, nearly 6-in-10 travelers see the market responding to high costs and crowding by traveling to off-the-beaten-path destinations.

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.





Spending on luxury travel

Statement:

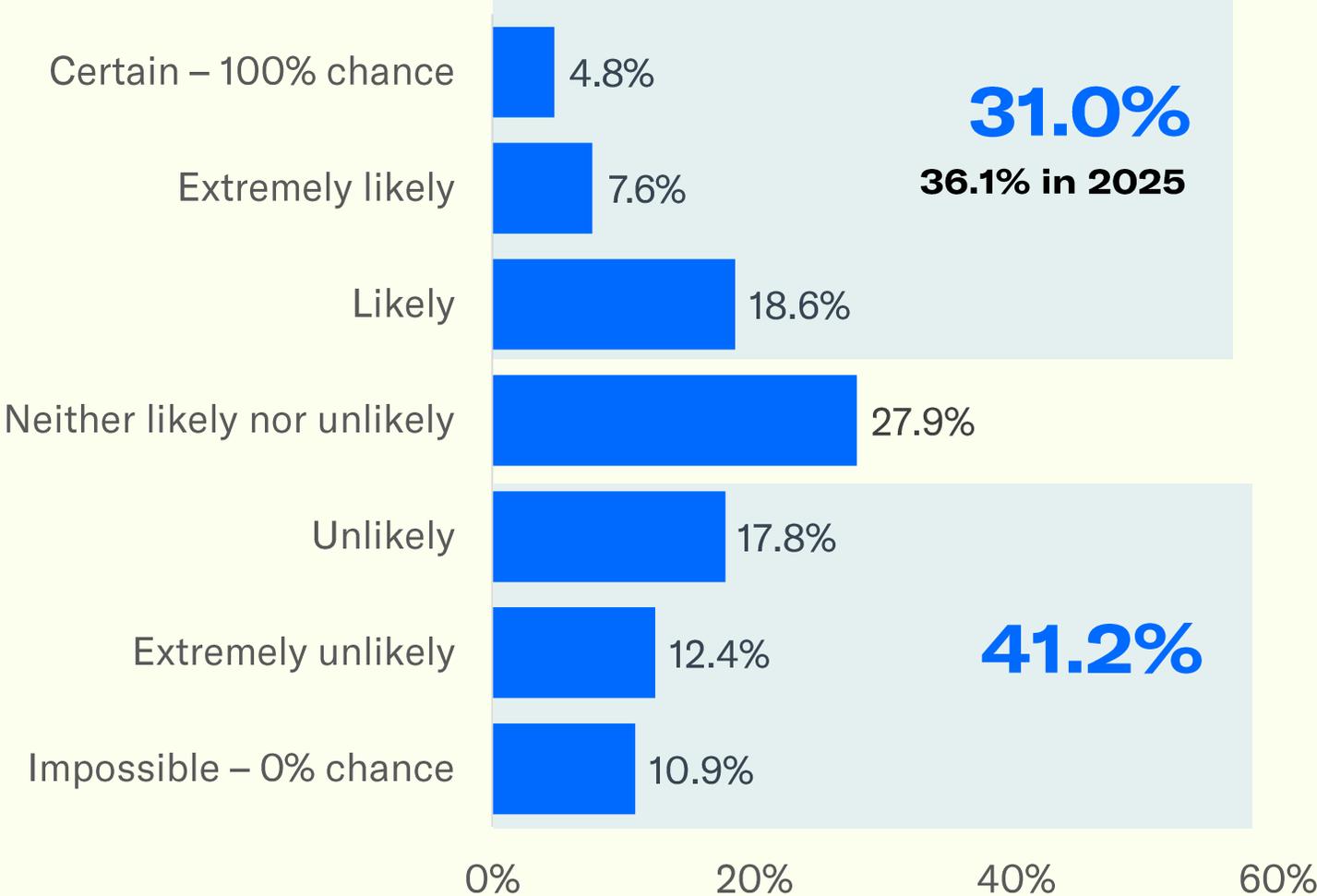
I will spend more money on luxury travel experiences.

Future Partners

Expectations to spend on luxury are down somewhat this year.

Statement:

I will spend more money on luxury travel experiences.





Prediction #2

Significant frustration with the travel experience will continue.



Travel frustrations continue

Statement:

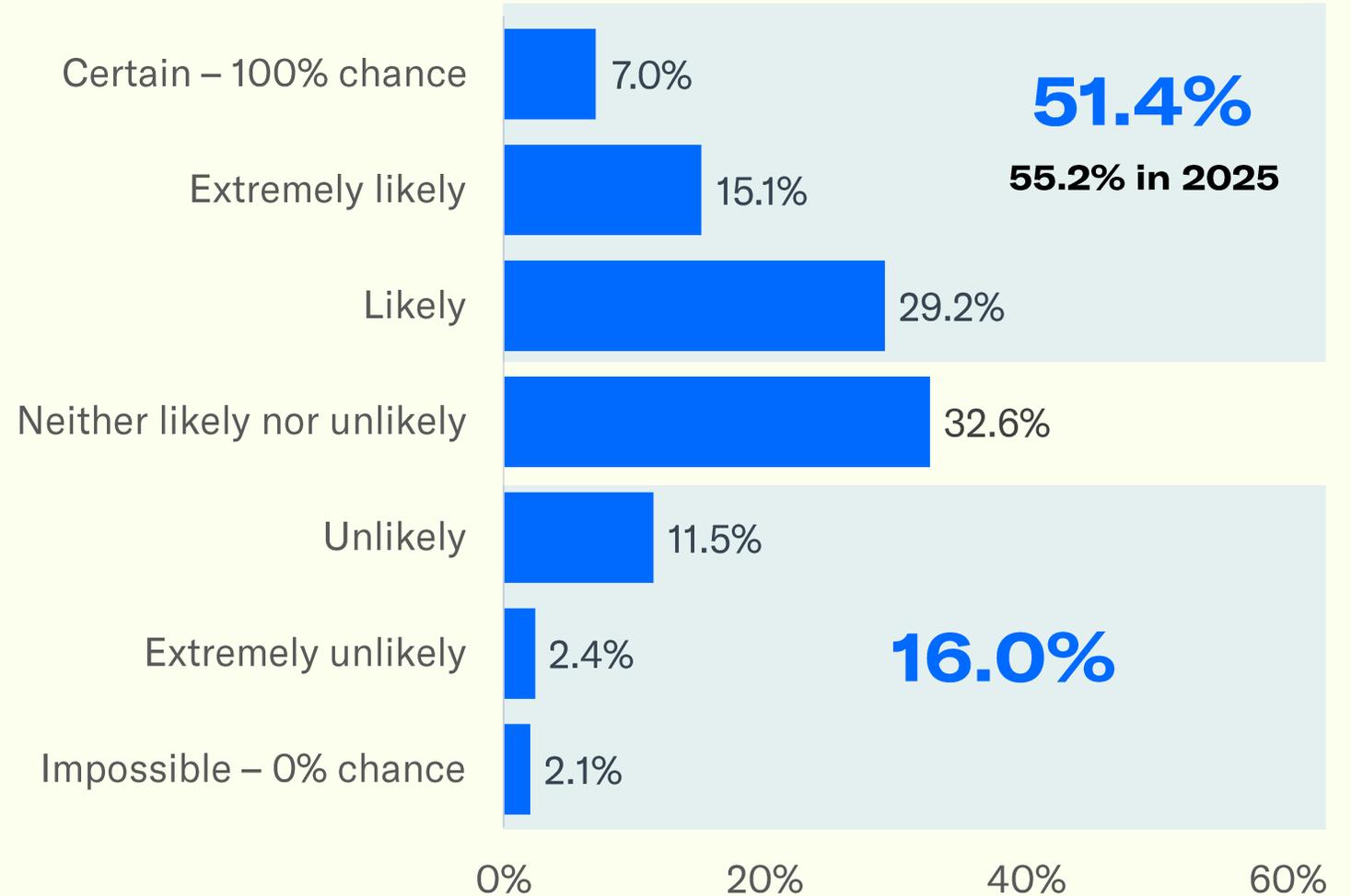
Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)

Future Partners

Fewer but still many see domestic travel as an increasingly frustrating experience.

Statement:

Domestic travel will become generally more frustrating (e.g., overcrowding, air travel breakdowns, poor customer service, etc.)





Prediction #3

**Concerns related to
sustainability will be of
significant but not growing
importance to travelers.**



Mitigating environmental impact

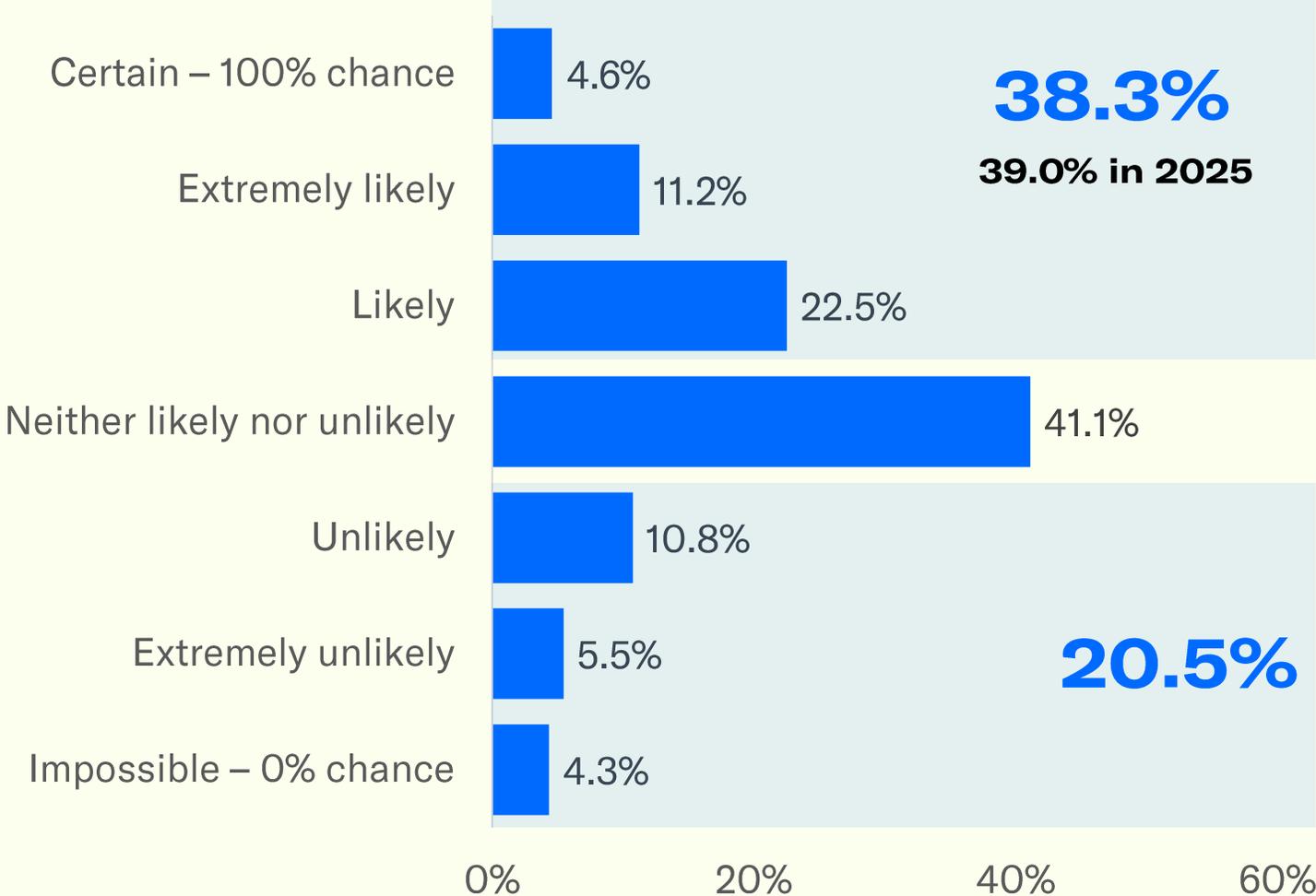
Statement:

I'll be more proactive in reducing the impact of my travel on the environment.

Four-in-ten travelers will be more proactive in reducing the impact of their travels on the environment.

Statement:

I'll be more proactive in reducing the impact of my travel on the environment.





Cooler places to travel

Statement:

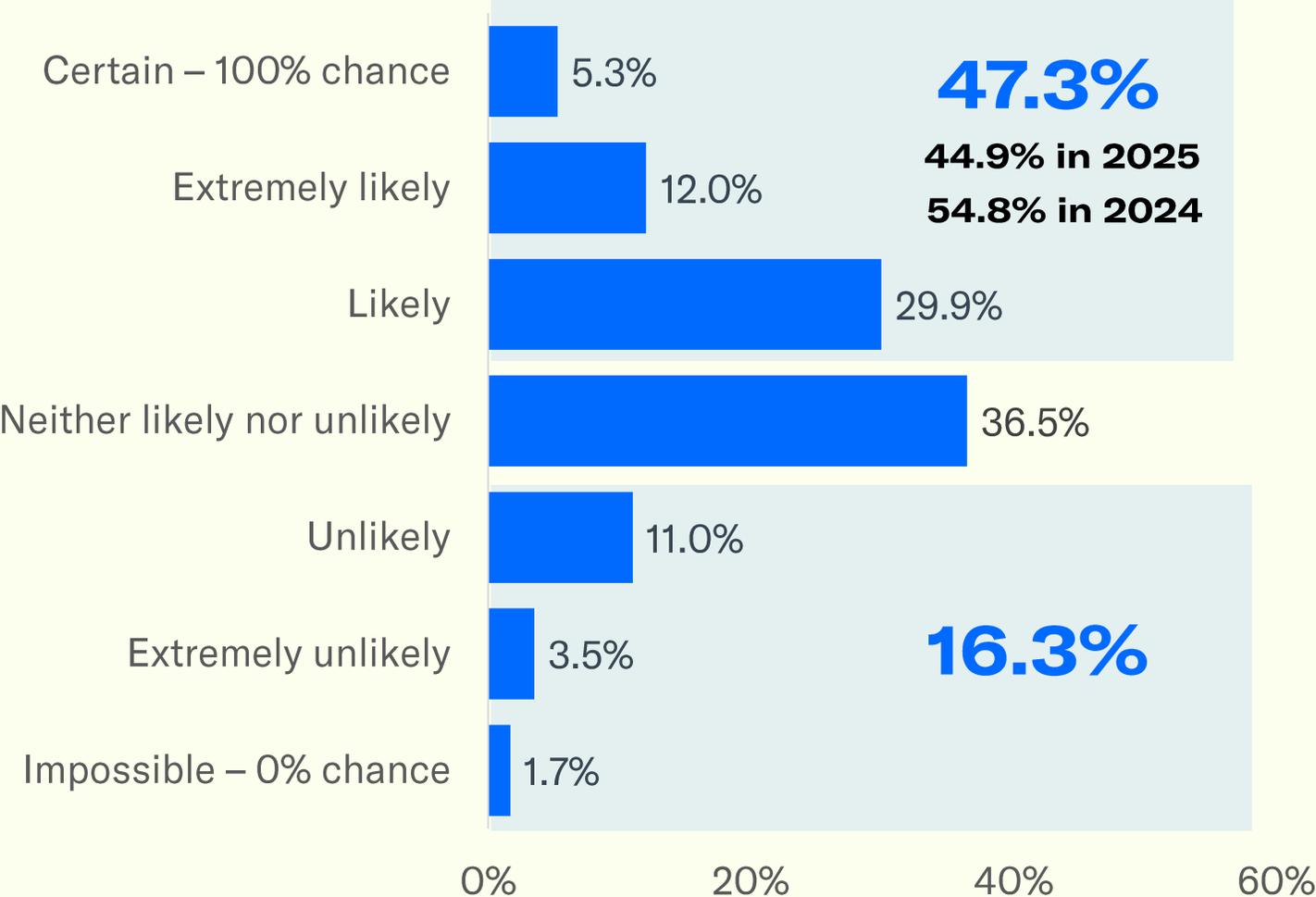
With higher temperatures each year, travelers will try to seek out cooler places.

Future Partners

47% of American travelers predict that increasingly warmer climates will drive travelers to seek cooler destinations for their trips

Statement:

With higher temperatures each year, travelers will try to seek out cooler places.





Prediction #4

Technology will play
a growing role in the
evolution of travel planning.



Artificial Intelligence as a travel planning tool

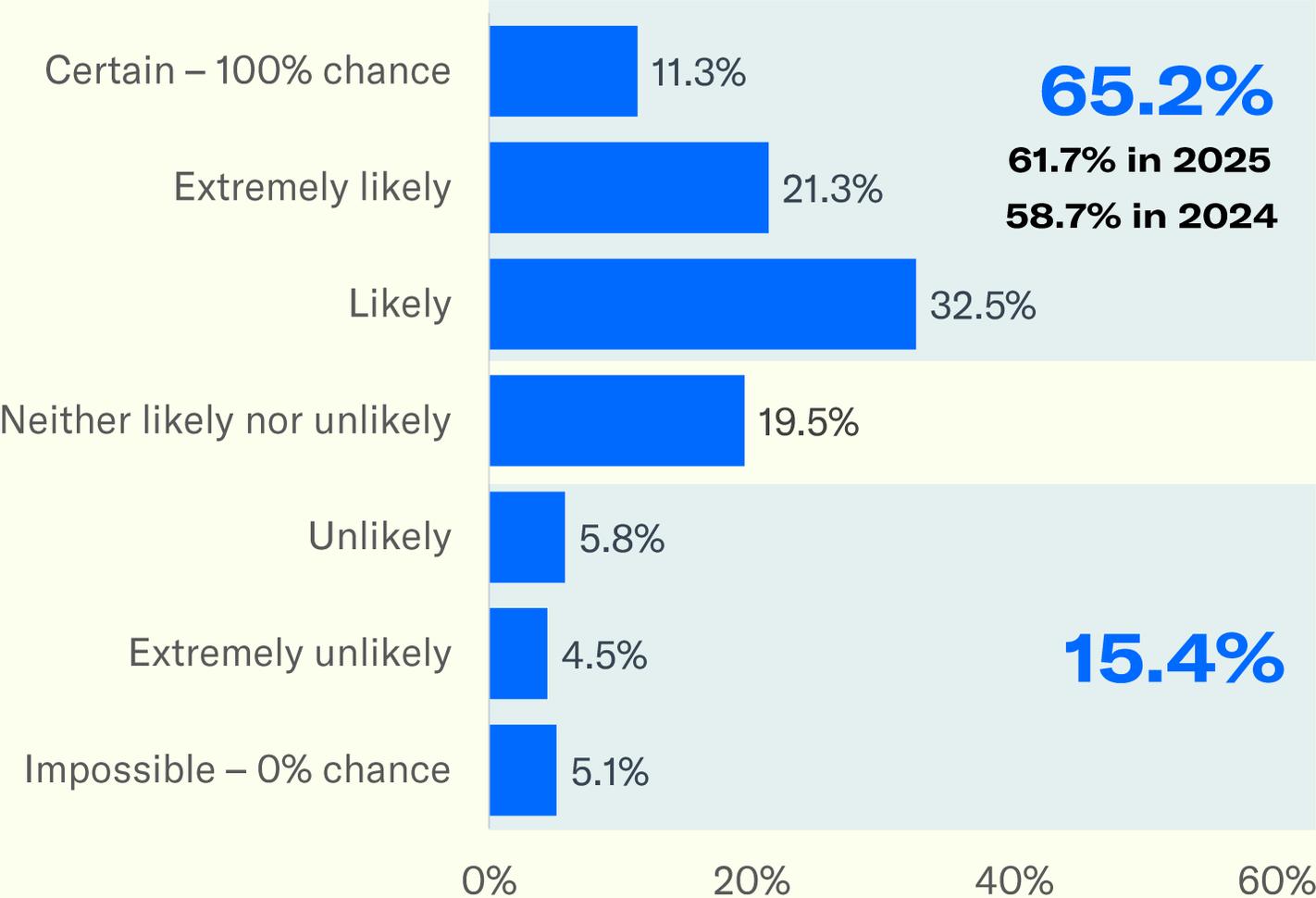
Statement:

Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.

Future Partners

Travelers aware of AI's growing importance to the travel planning landscape.

Statement:
Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.





Dynamic Pricing Grows

Statement:

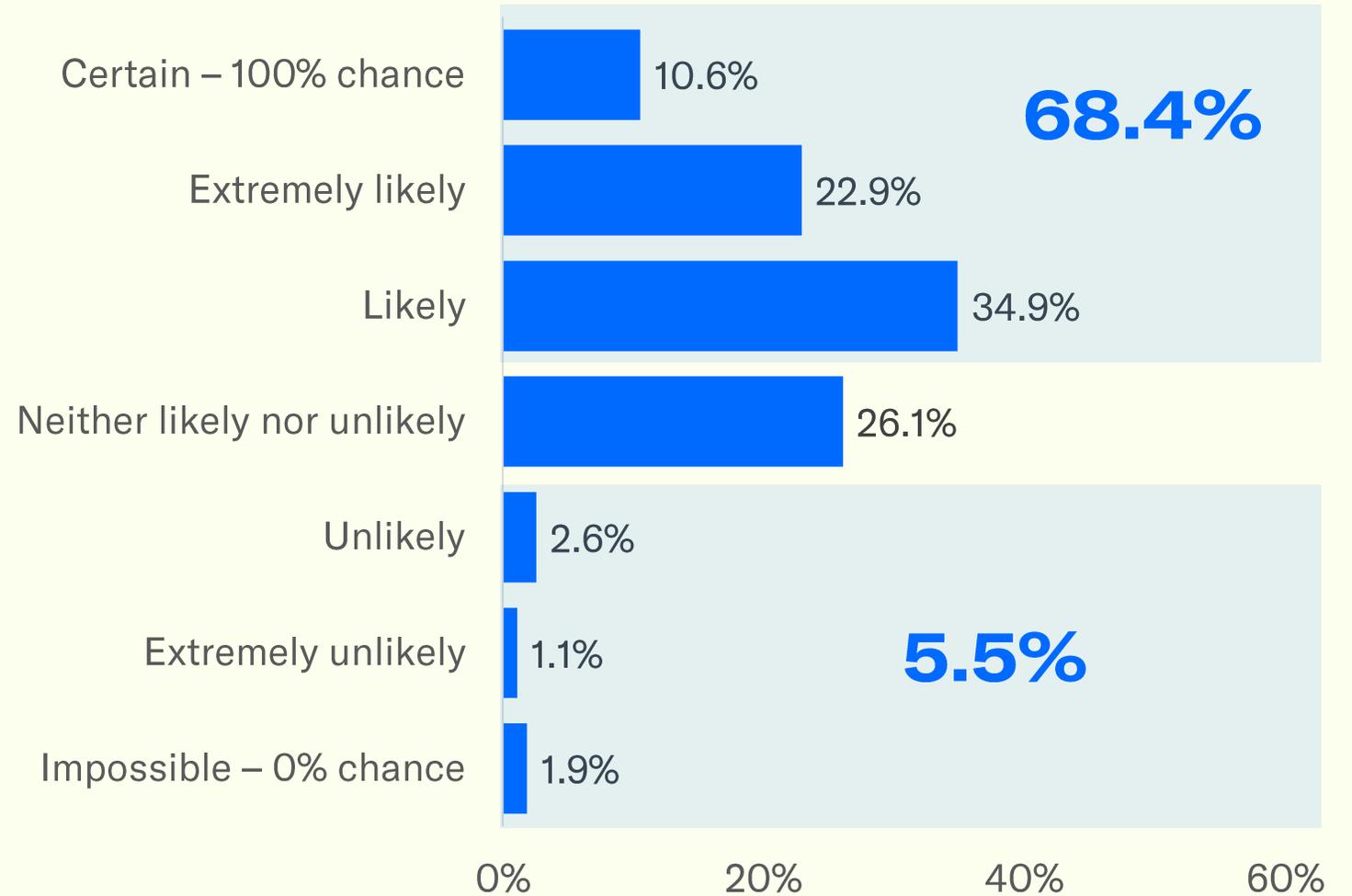
More travel companies will use AI-powered dynamic pricing in 2026.

Future Partners

Travelers foresee growth in dynamic pricing.

Statement:

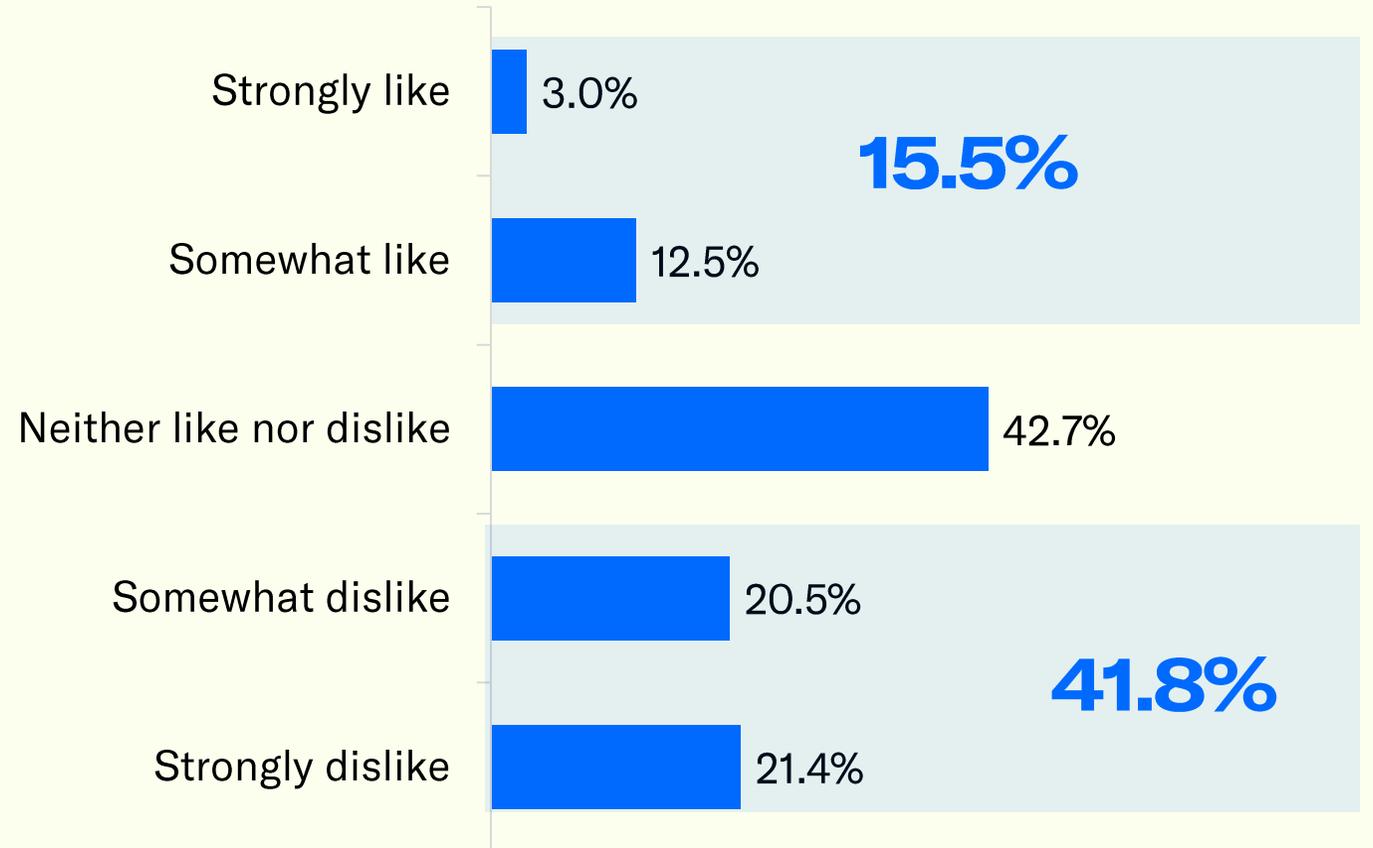
More travel companies will use AI-powered dynamic pricing in 2026.



...but AI-powered Dynamic Pricing Isn't Popular With American Travelers.

Question:

Which best describes how you would feel about buying travel products and services (airline tickets, hotel reservations, rental cars, etc.) from a company using AI-powered dynamic pricing?





Prediction #5

**Politics will impact both
inbound and outbound
travel markets.**



Politics and travel

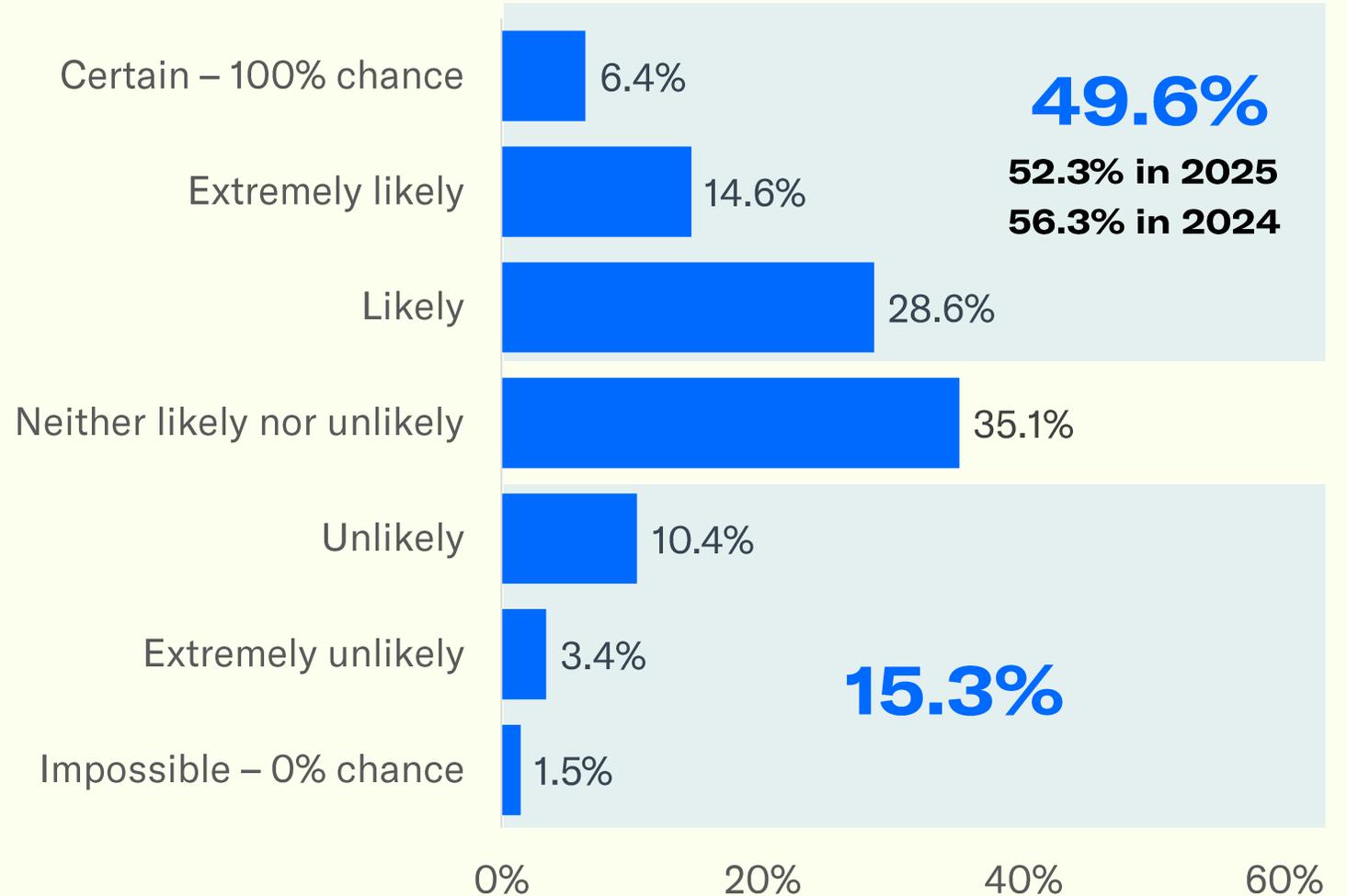
Statement:

More travelers will avoid (or select) destinations based on their personal politics.

Half of American travelers see politics as influencing the places we visit.

Statement:

More travelers will avoid (or select) destinations based on their personal politics.





Will international travelers avoid the USA?

Statement:

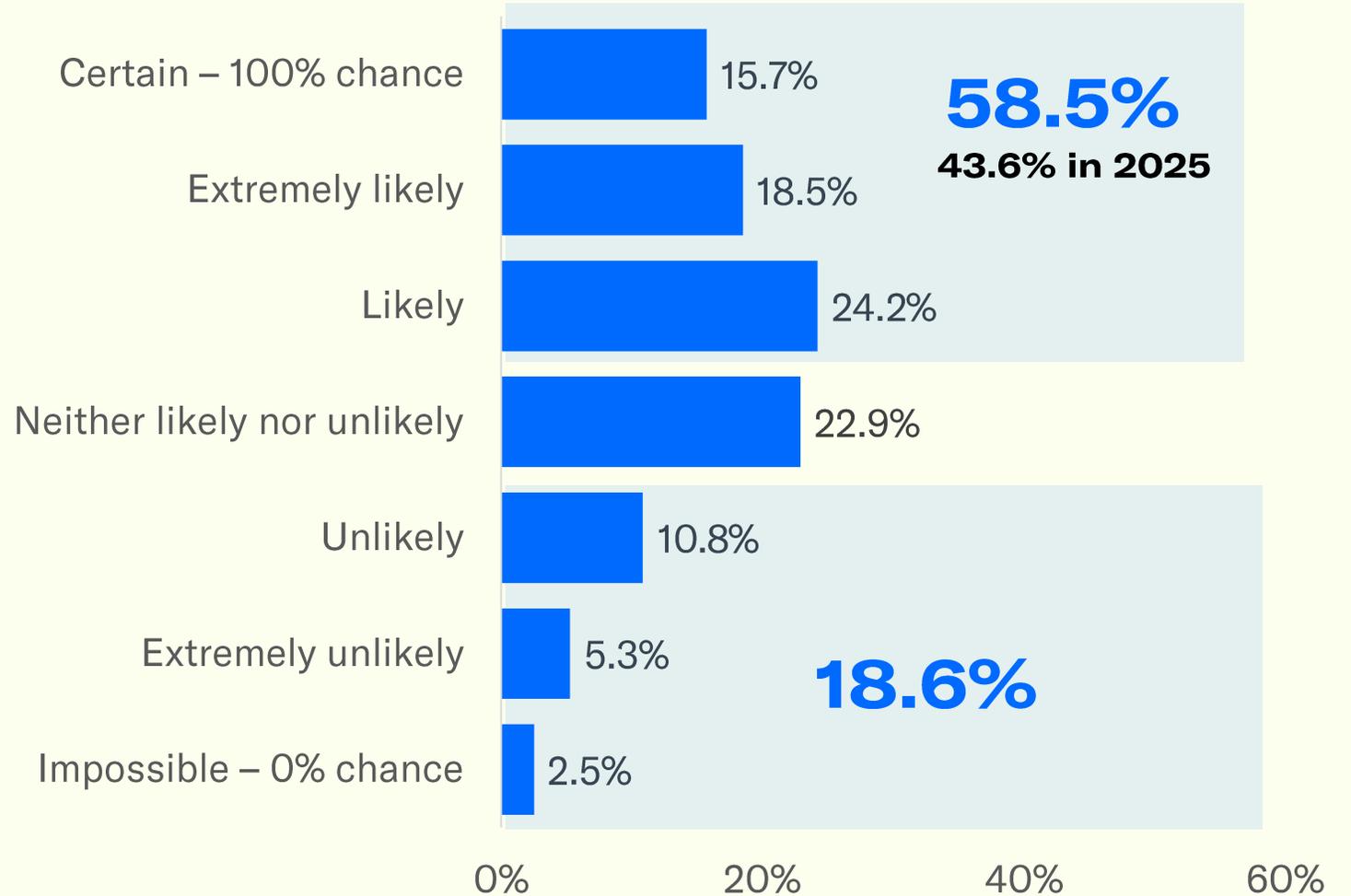
International tourists will avoid visiting the U.S. because of its contentious politics.

Future Partners

Our sense that American politics will scare away international tourist heightens.

Statement:

International tourists will avoid visiting the U.S. because of its contentious politics.





Will American travelers be unwelcome abroad?

Statement:

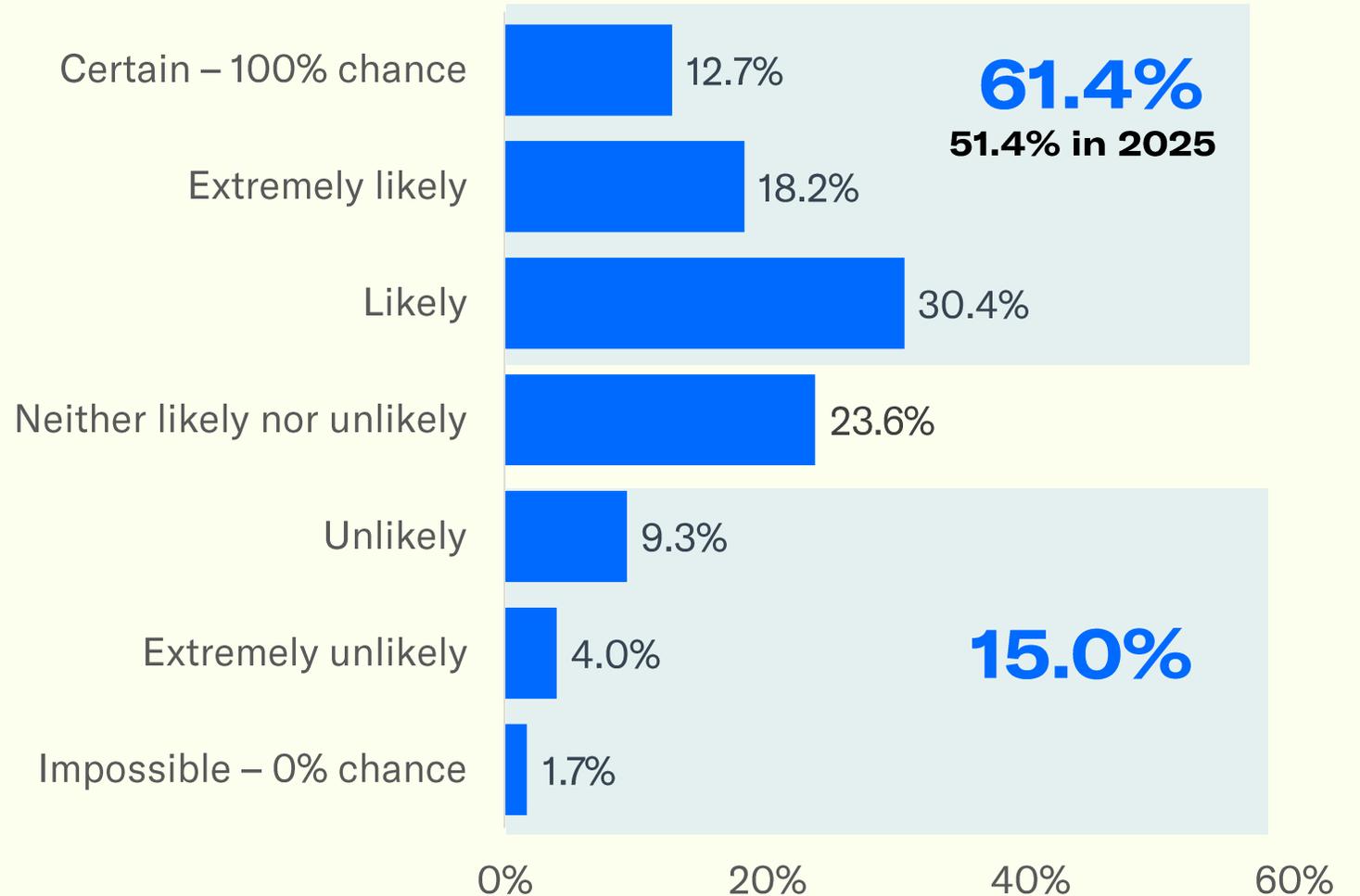
Foreign destinations will become less welcoming to American travelers

Future Partners

Americans are increasingly unsure they will be welcomed when visiting foreign countries in 2026.

Statement:

Foreign destinations will become less welcoming to American travelers





Anti-tourism protests grow?

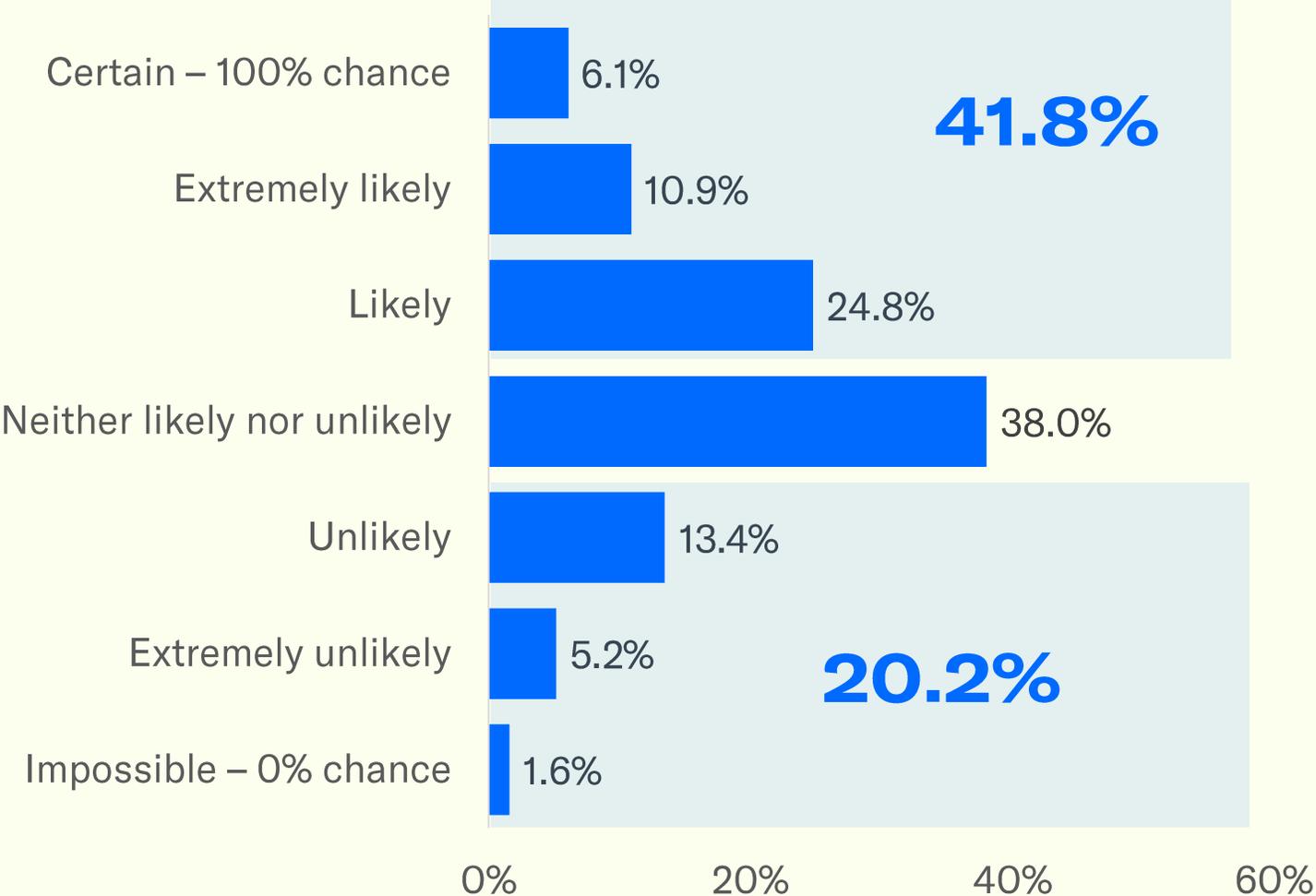
Statement:

Anti-tourism protests will become more common.

Future Partners

By a two-to-one ratio, American travelers expect more anti-tourism protests.

Statement:
Anti-tourism protests will become more common.





Destinations capping travel volume

Statement:

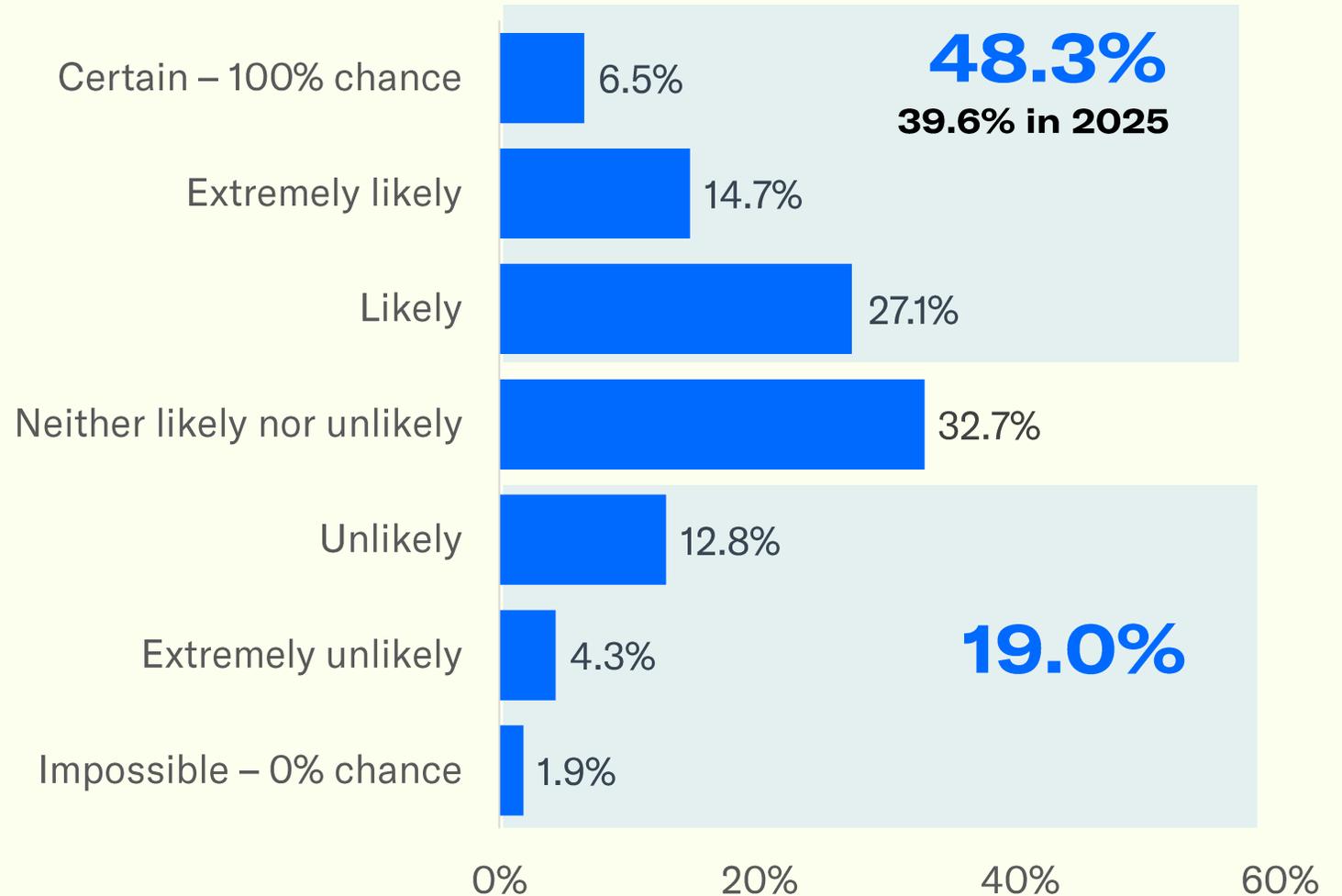
More destinations will start capping the number of tourists to protect their communities.

Future Partners

Nearly 50% of travelers expect that destinations will start capping the number of tourists allowed to protect their communities.

Statement:

More destinations will start capping the number of tourists to protect their communities





Prediction #6

**Despite the stresses
we've looked at,
2026 will be a year for
travel dreamers.**



Stepping outside our comfort zones

Statement:

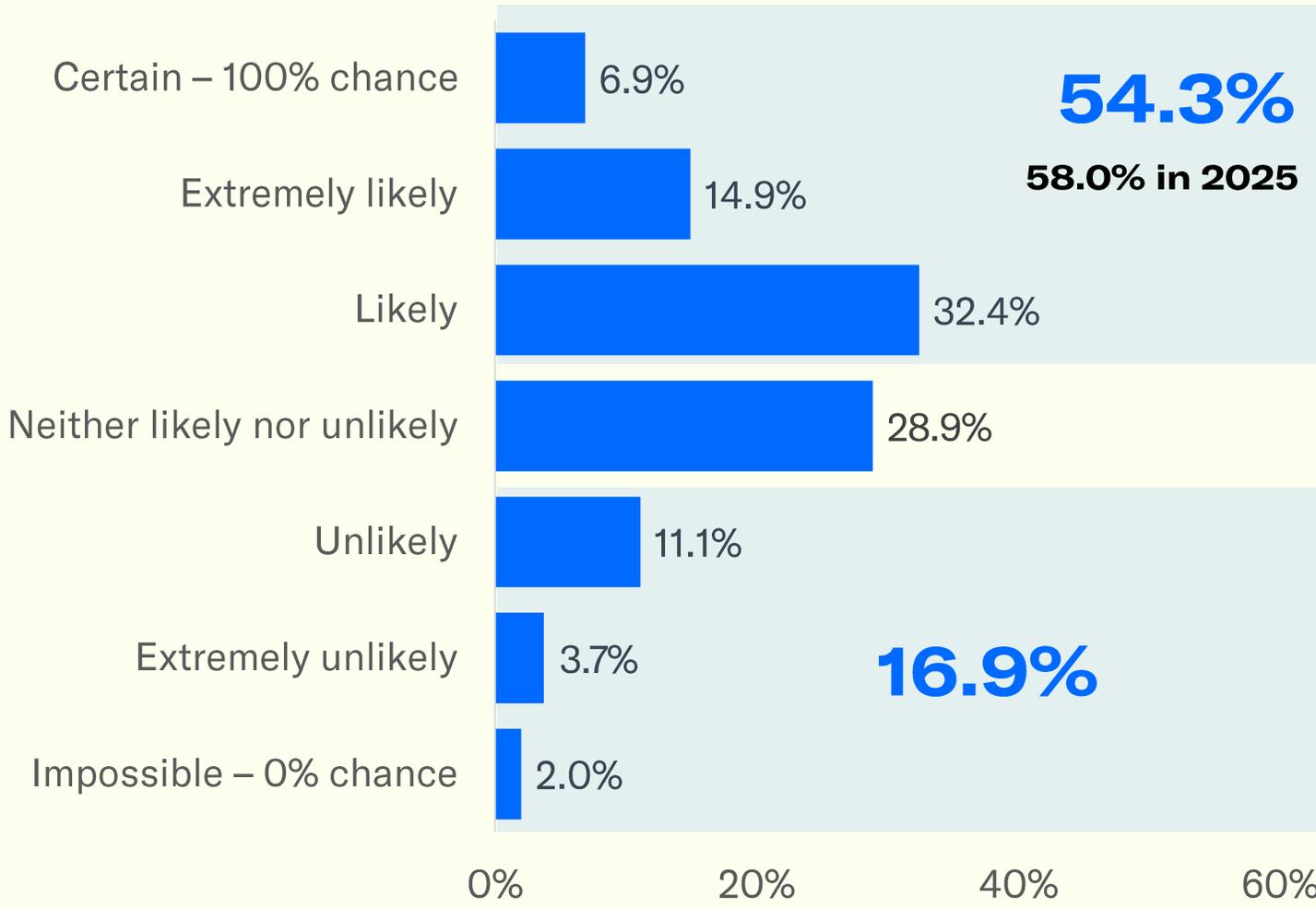
I will use travel as an opportunity to step outside my comfort zone.

Future Partners

The majority will use travel as a way to step outside their comfort zone this year.

Statement:

I will use travel as an opportunity to step outside my comfort zone.





Dream trips on the rise

Statement:

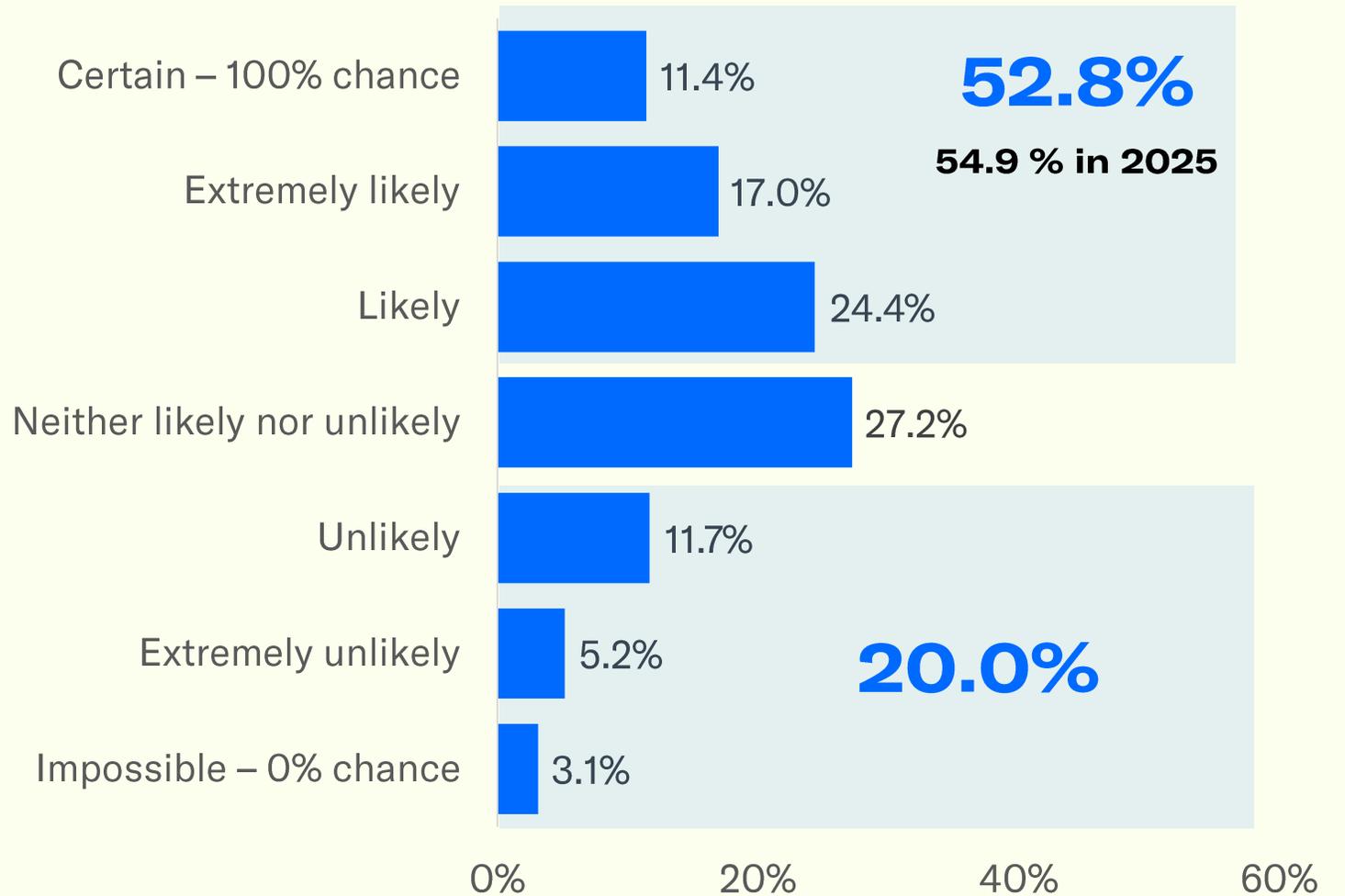
I'll take a dream trip to somewhere exciting in 2026.

Future Partners

Many see it as likely that they'll take a dream trip to somewhere exciting in the next year.

Statement:

I'll take a dream trip to somewhere exciting in 2026



American Travelers Likely Predictions for 2026

Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2026

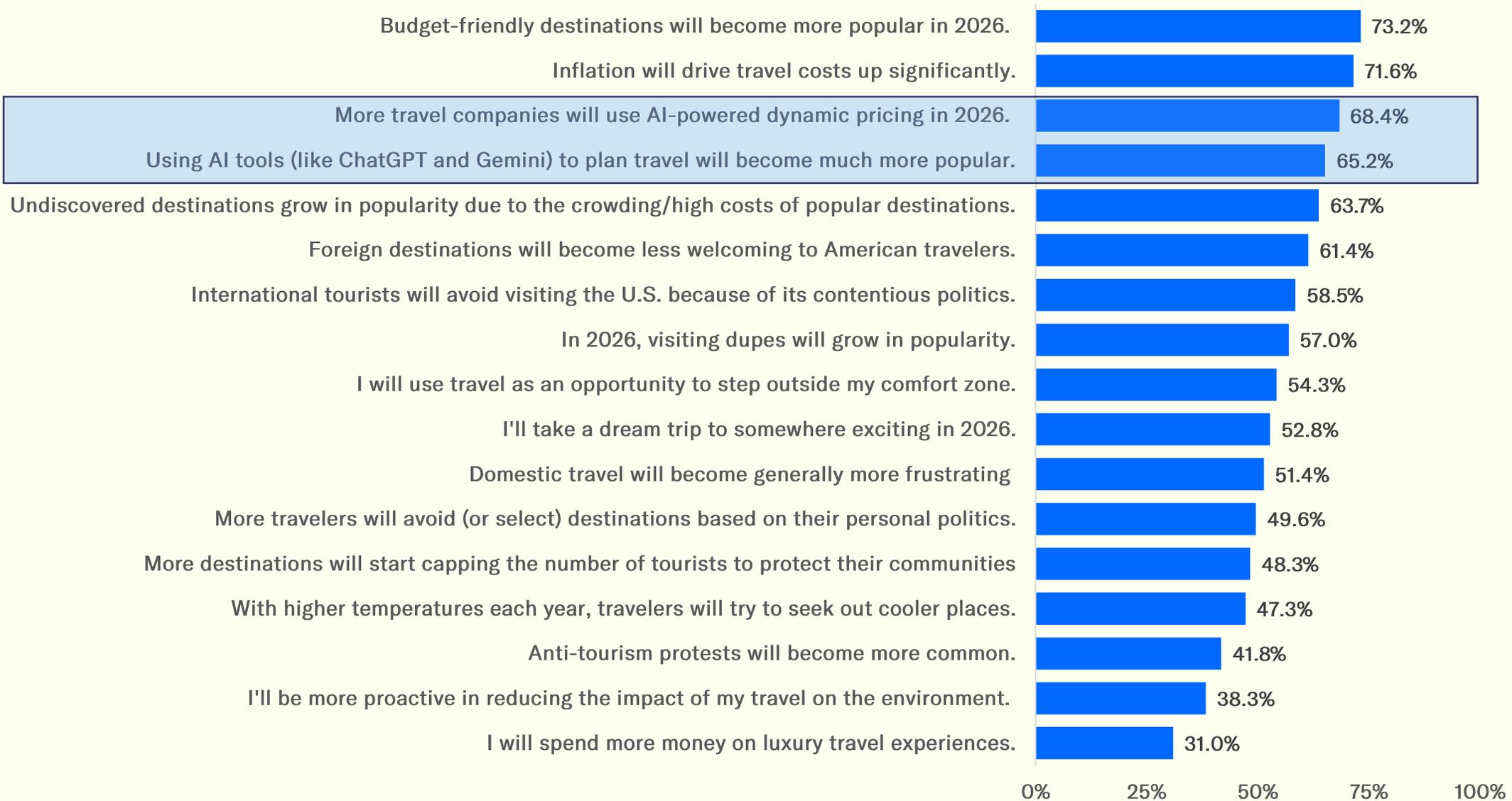
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2026

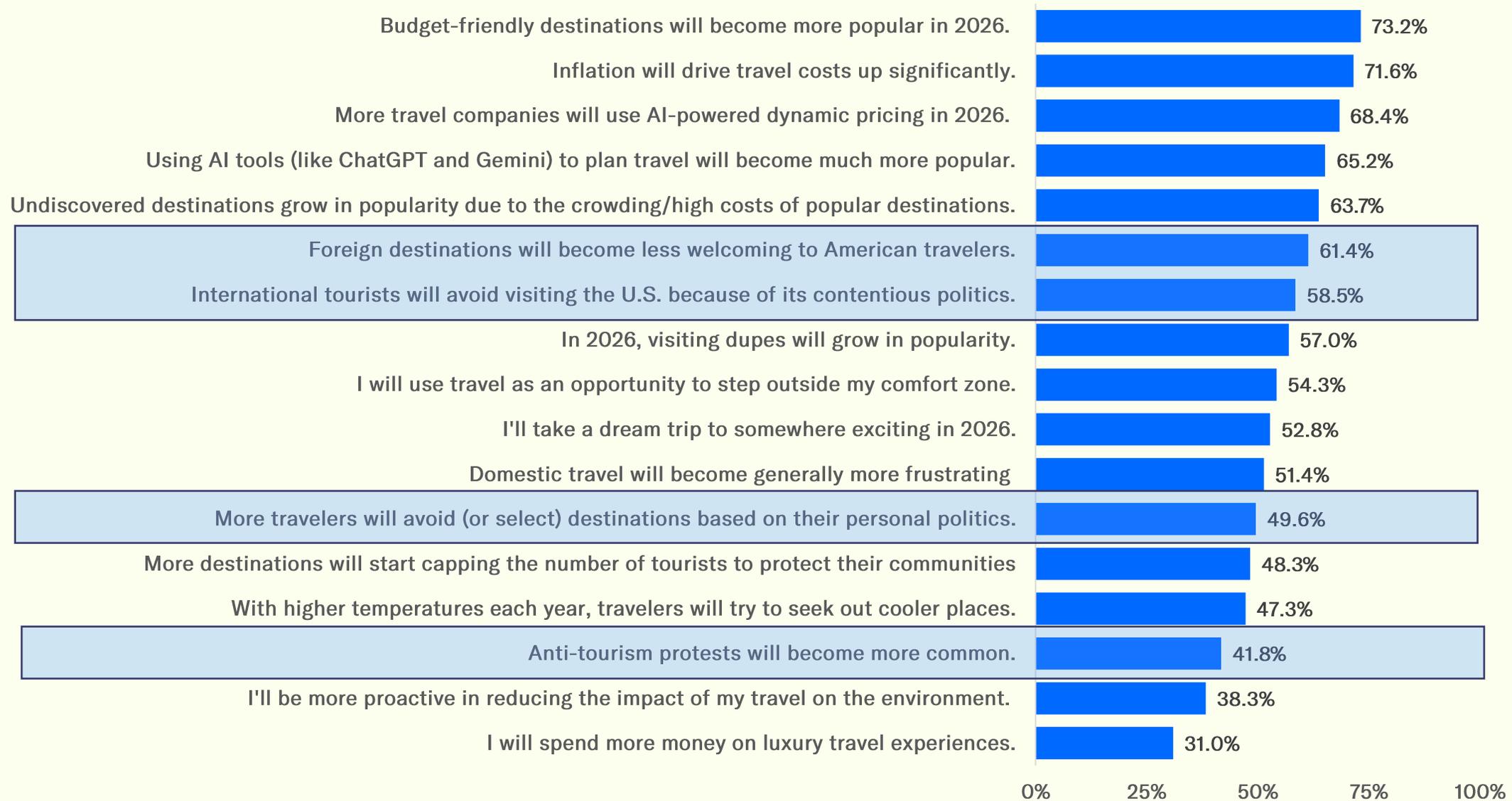
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



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American Travelers Likely Predictions for 2026

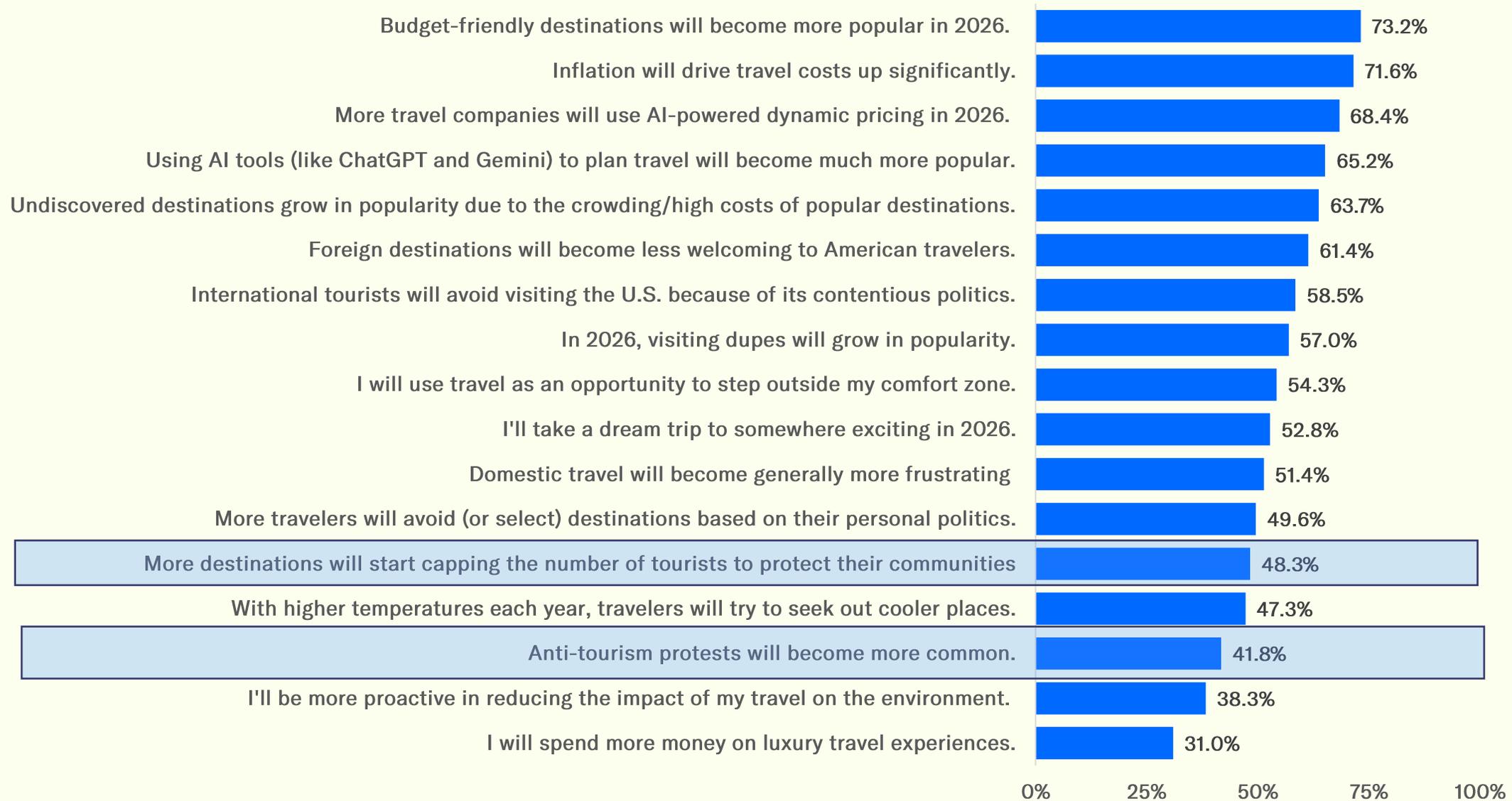
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



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American Travelers Likely Predictions for 2026

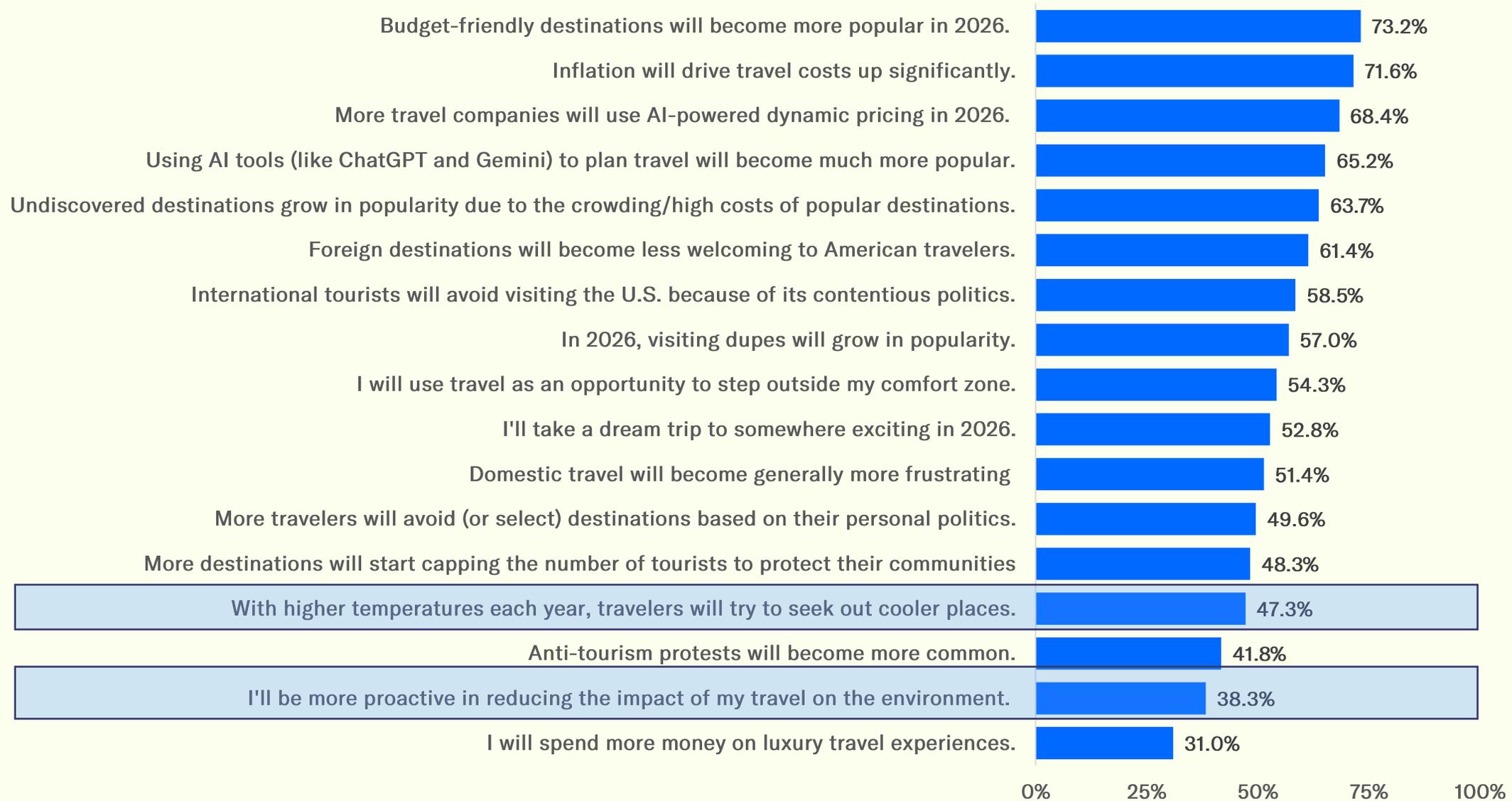
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2026

Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

*Travel Nostradamus
(in a nutshell)*

MONEY

POLITICS

AI

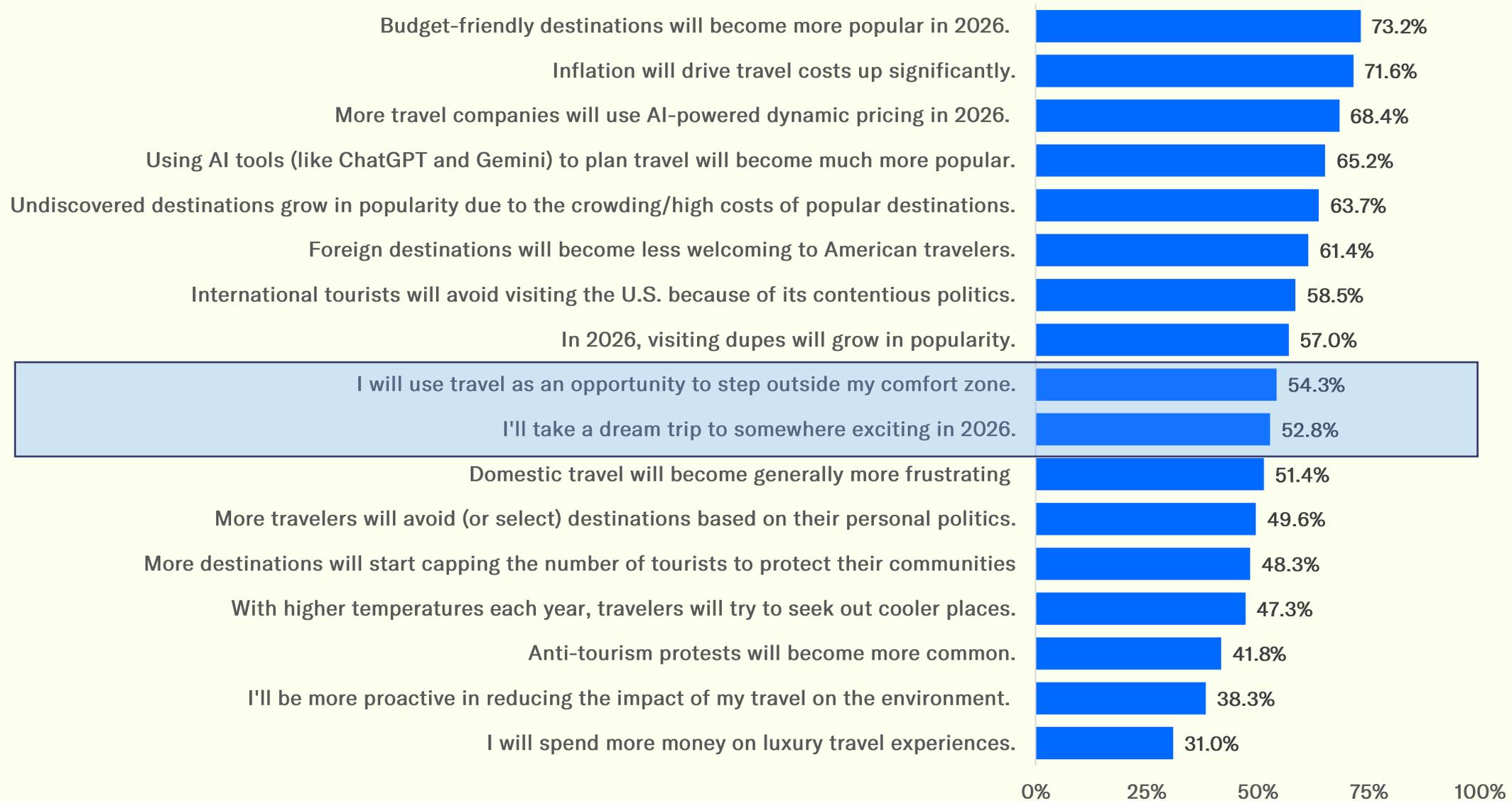
SUSTAINABILITY

OVER-TOURISM



American Travelers Likely Predictions for 2026

Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)

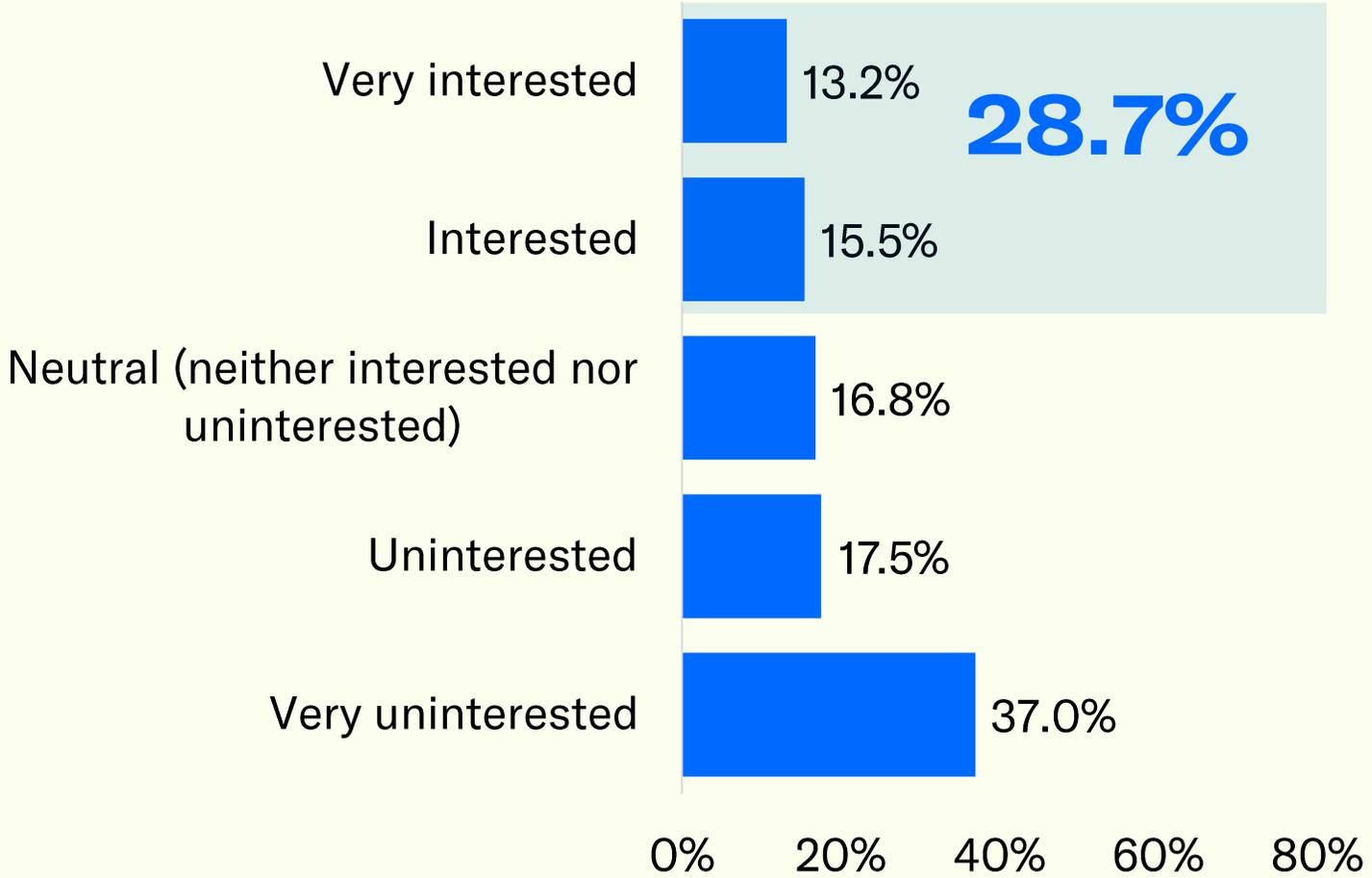


Some statements are shortened here to fit into chart.

FIFA World Cup Travel Interest Is Concentrated—and Actionable

Question: The FIFA World Cup men's soccer championship will be held next year in North America (USA, Mexico and Canada)?

How interested would you be in traveling to experience FIFA World Cup games and events?





The State of the American Traveler

Welcome back, Future Partners!



! New Specialty Traveler Profiles

- Home
- SPECIALTY PROFILES
 - FIFA World Cup 2026 Traveler
 - ← Change Profile
- Demographics
- Origin Markets
- Trip Volume & Value
- Planning & Booking Details
- Travel Brands

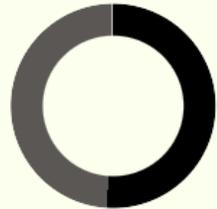
Demographics

FIFA World Cup 2026 Traveler | Interested in Traveling to Attend a FIFA 2026 World Cup Event

Year: 2025 YTD | Curated Collections: Total | Filters: American Travelers

American Travelers

Gender



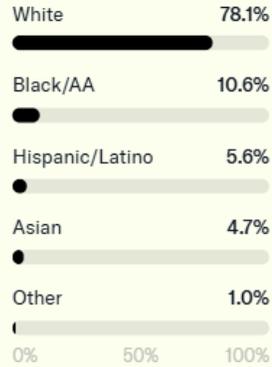
Female	51.0%
Male	48.7%
Other	0.3%

Generation



Gen Z	7.0%
Millennials	29.8%
Gen X	29.5%
Boomers+	33.7%

Ethnicity/Race



\$114,503
Average Income

65.5%
College Graduate

61.6%
Employed Full-Time

Married/Partnered
56.3%

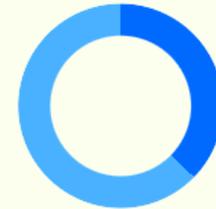
Children at Home
29.8%

LGBTQIA+
7.3%

Accessibility Needs
14.2%

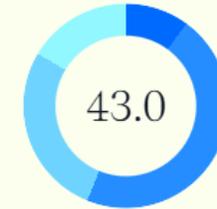
FIFA World Cup 2026 American Travelers

Gender



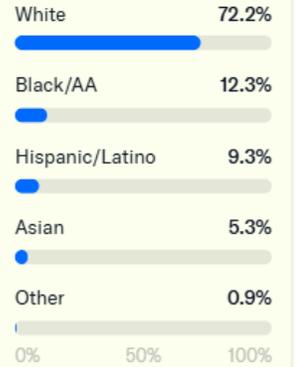
Female	37.3%
Male	62.7%
Other	0.0%

Generation



Gen Z	10.1%
Millennials	46.1%
Gen X	27.4%
Boomers+	16.5%

Ethnicity/Race



\$142,952
Average Income

81.0%
College Graduate

76.8%
Employed Full-Time

Married/Partnered
67.2%

Children at Home
52.9%

LGBTQIA+
4.9%

Accessibility Needs
14.1%

Webinar: The Future of the Meetings Industry



miles
PARTNERSHIP

January 22, 2026
12pm PT/3pm ET

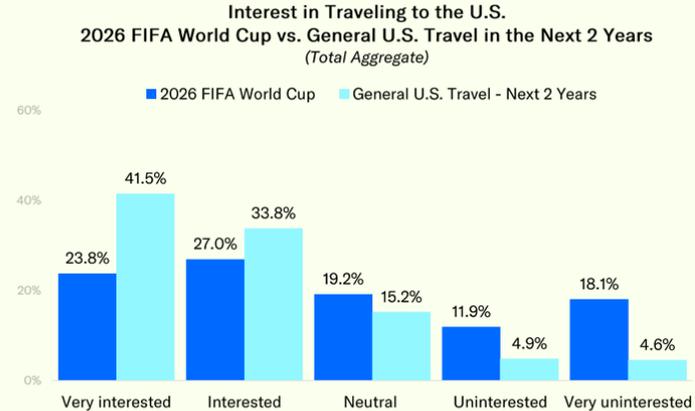
The State of the International Traveler: Insights to Grow Your Share of International Inbound Visitation

Gain Comprehensive Marketing Insight on the Following Countries:

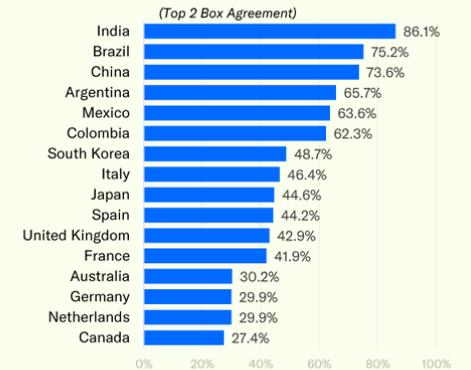
- Argentina
- Australia
- Brazil
- Canada
- China
- Colombia
- France
- Germany
- India
- Italy
- Japan
- Mexico
- The Netherlands
- South Korea
- Spain
- United Kingdom

U.S. Opportunity: The Impact of the 2026 FIFA World Cup

Just over half of international travelers surveyed would be **interested** in visiting the U.S. specifically for the **2026 FIFA World Cup**.



% Interested in Traveling to the U.S. for the 2026
FIFA World Cup – By Market



Future Partners The State of the International Traveler

Let's keep the conversation going



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