

Future Partners

The State of the American Traveler



February 2026

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, showing a dense network of lights and roads. The image is overlaid with a semi-transparent blue filter. The text is positioned in the upper left quadrant.

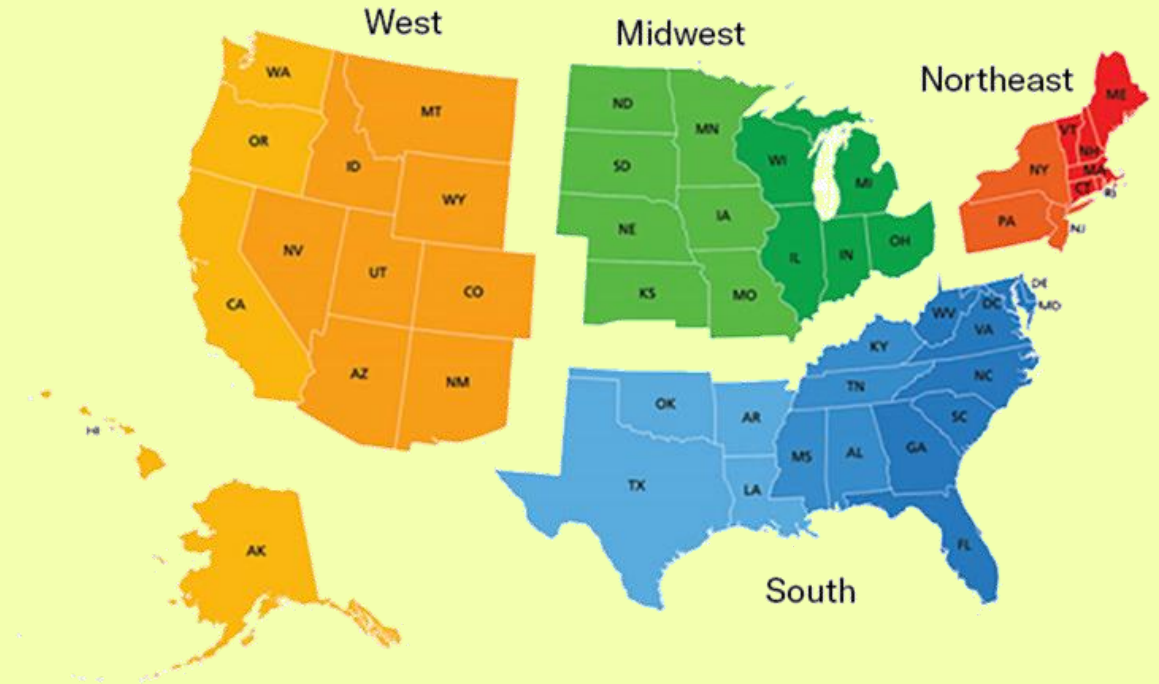
Presentation deck and recording will be available on our website:

FuturePartners.com

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: [January 15-29, 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

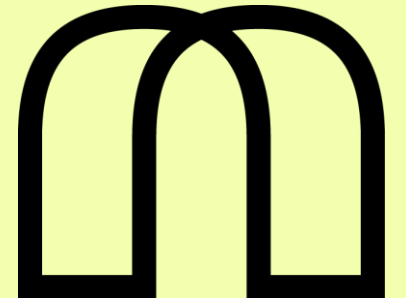
United States Census Regions





Travel Sentiment

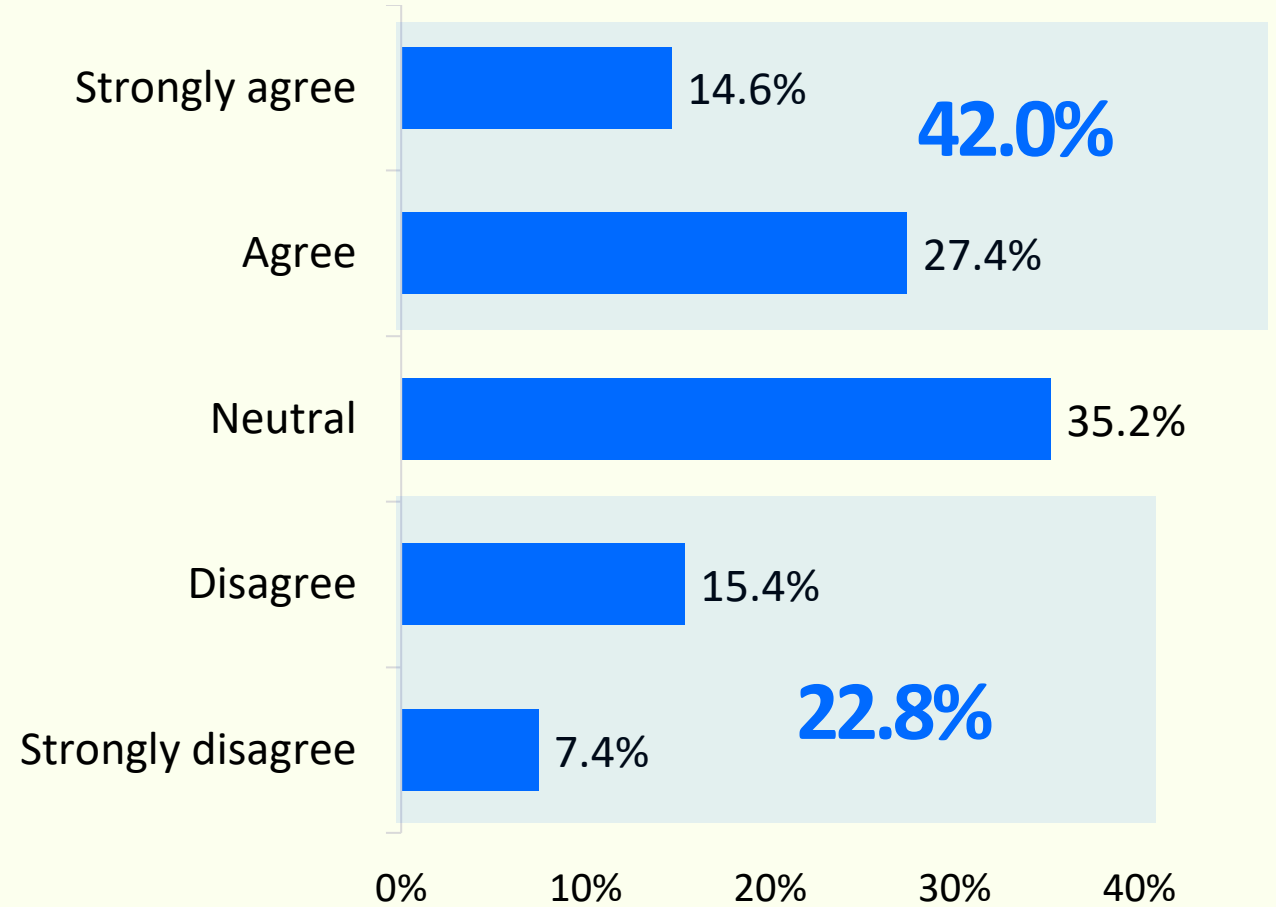
How are Americans Feeling About the Future of the Economy?



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

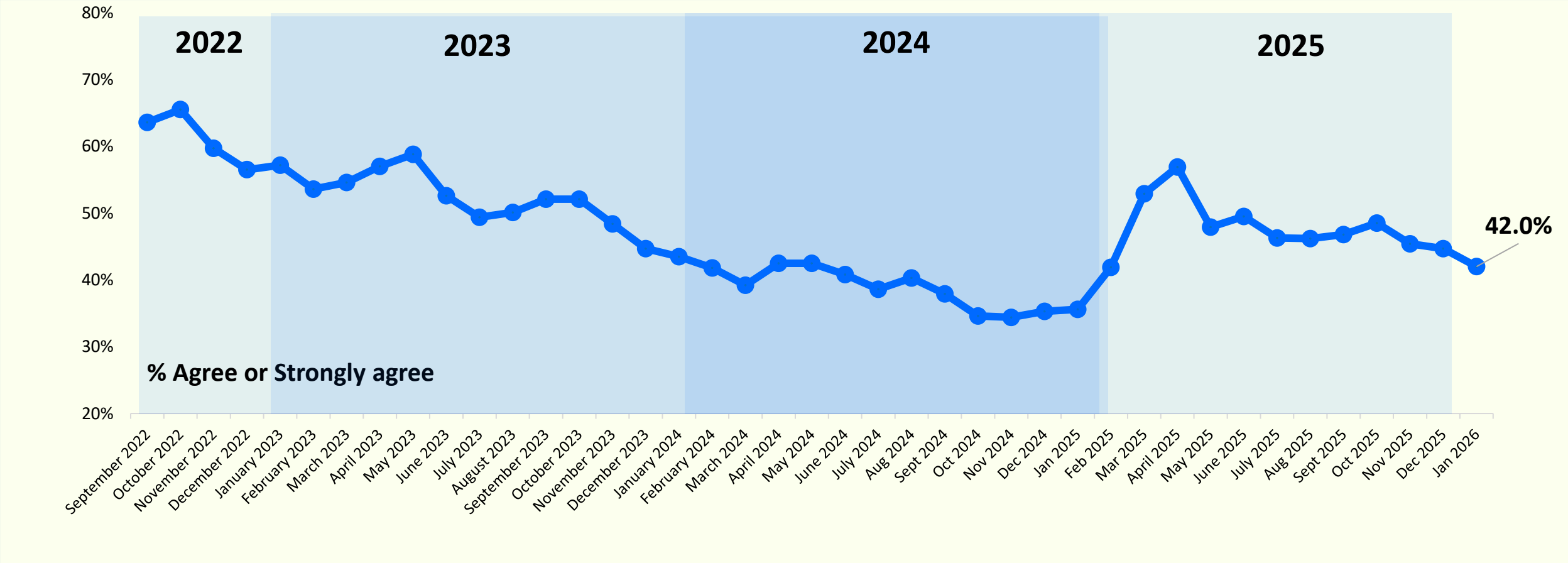
Statement Agreement:

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

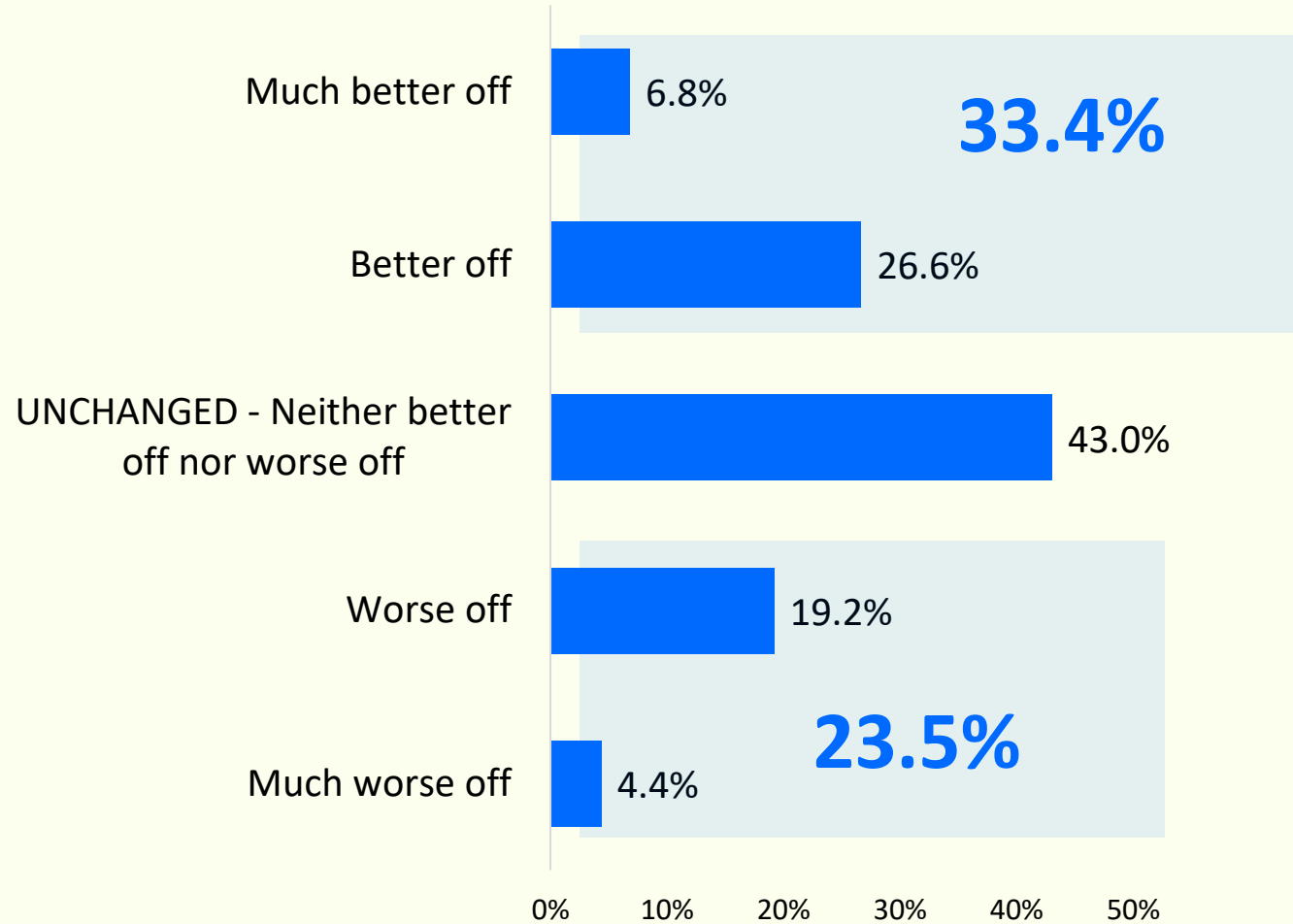
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Traveler Financial Sentiment Improved Slightly in January

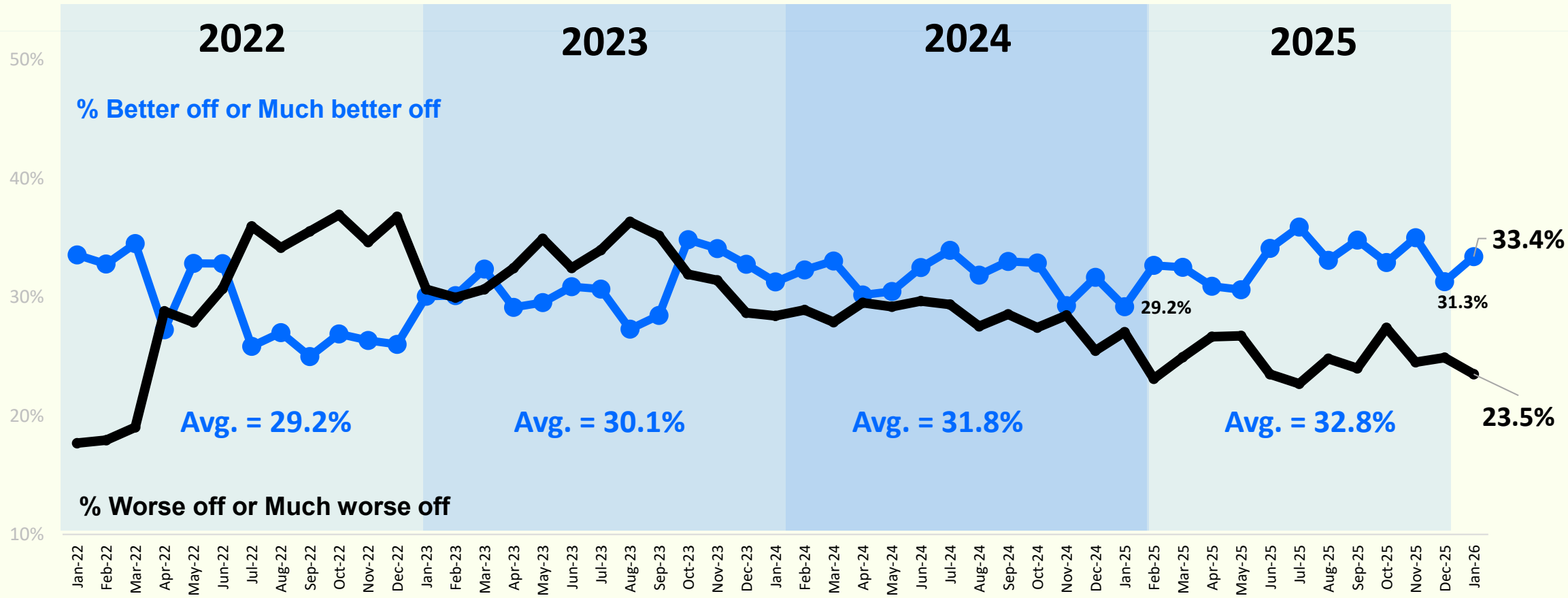
Question:

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



Traveler Financial Sentiment Improved Slightly in January

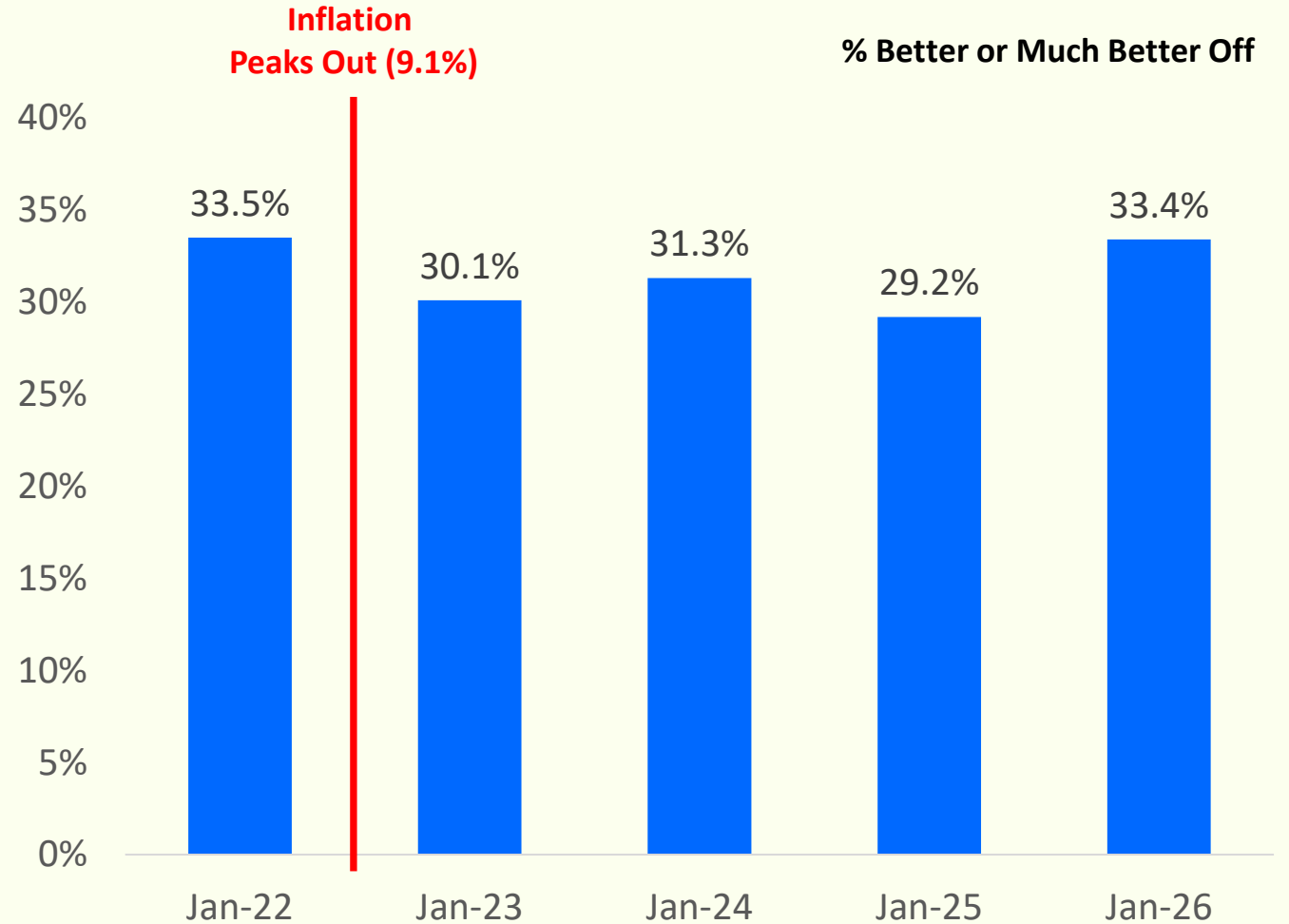
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



January Has Started Off Stronger Than Recent Years

Question:

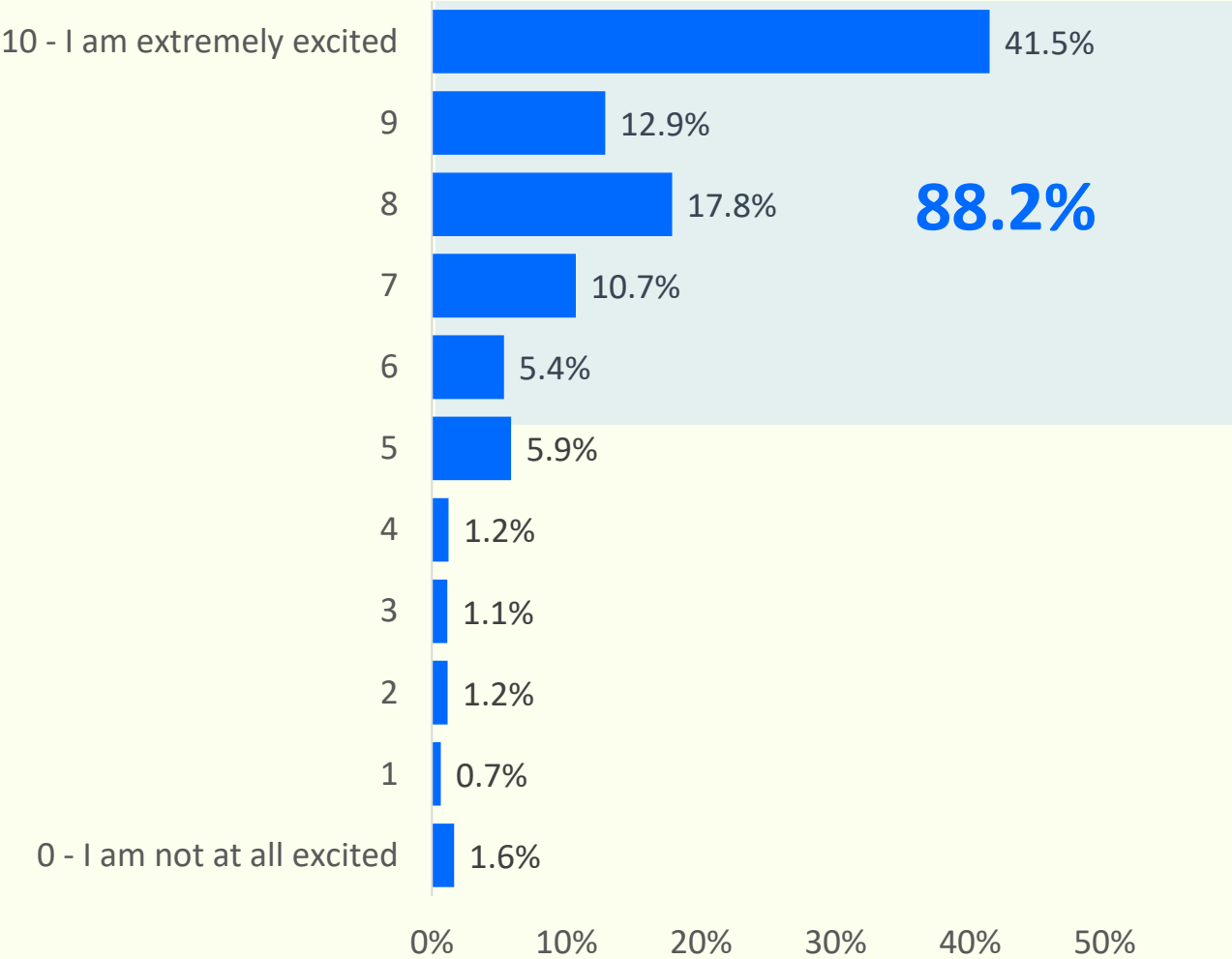
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Americans Are Still Very Excited to Travel

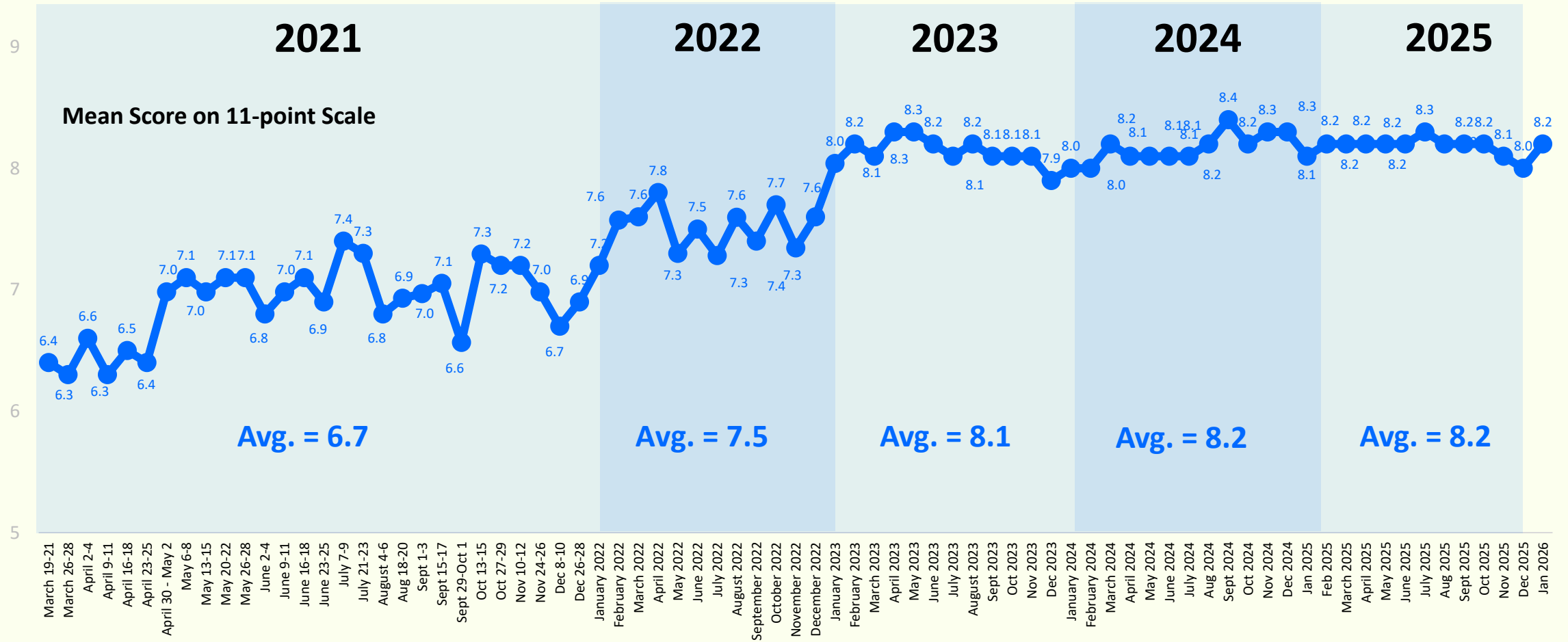
Question:

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



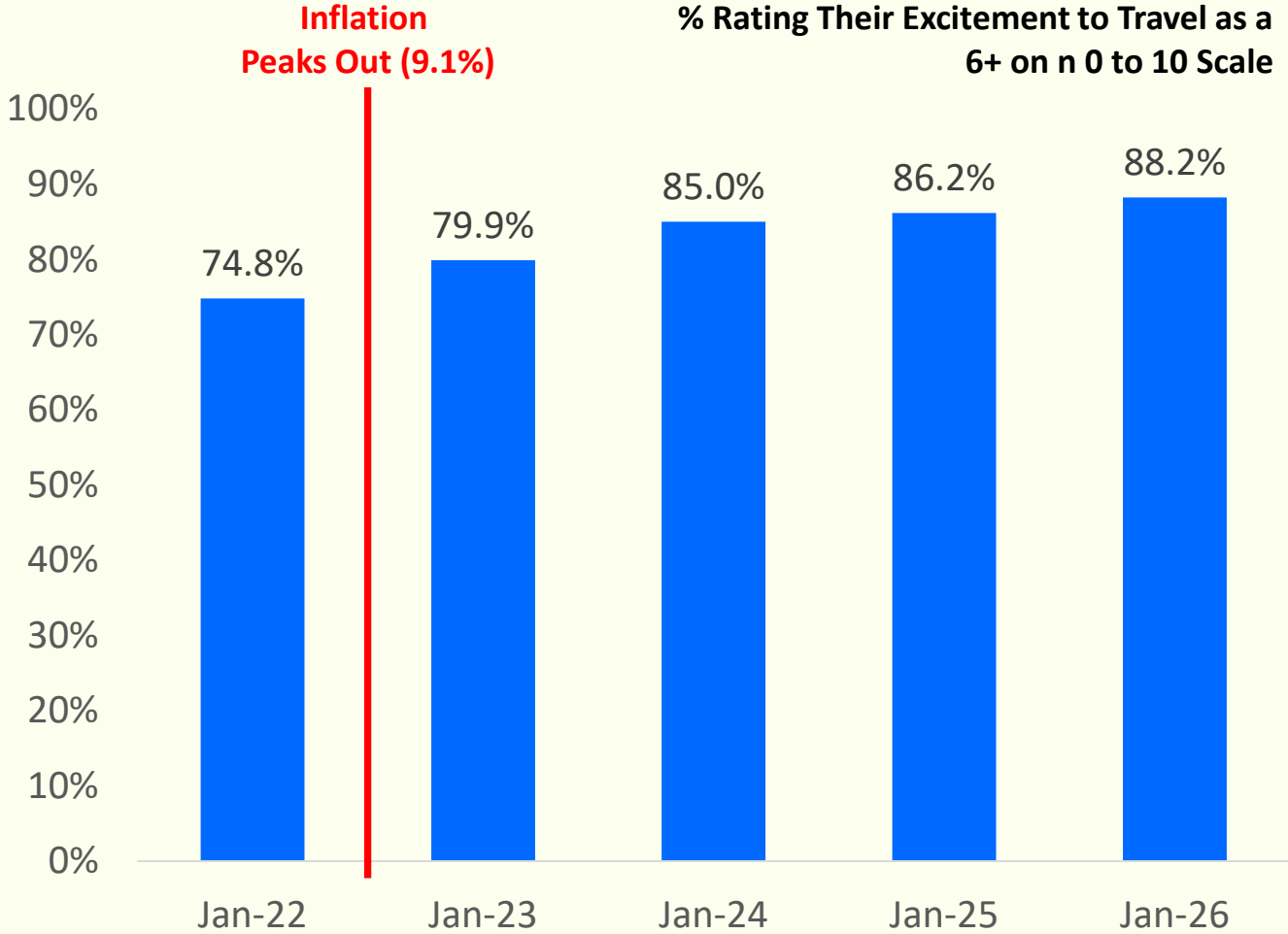
Americans Excitement to Travel Rebounded in January

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



Solid Growth is Seen in This Metric

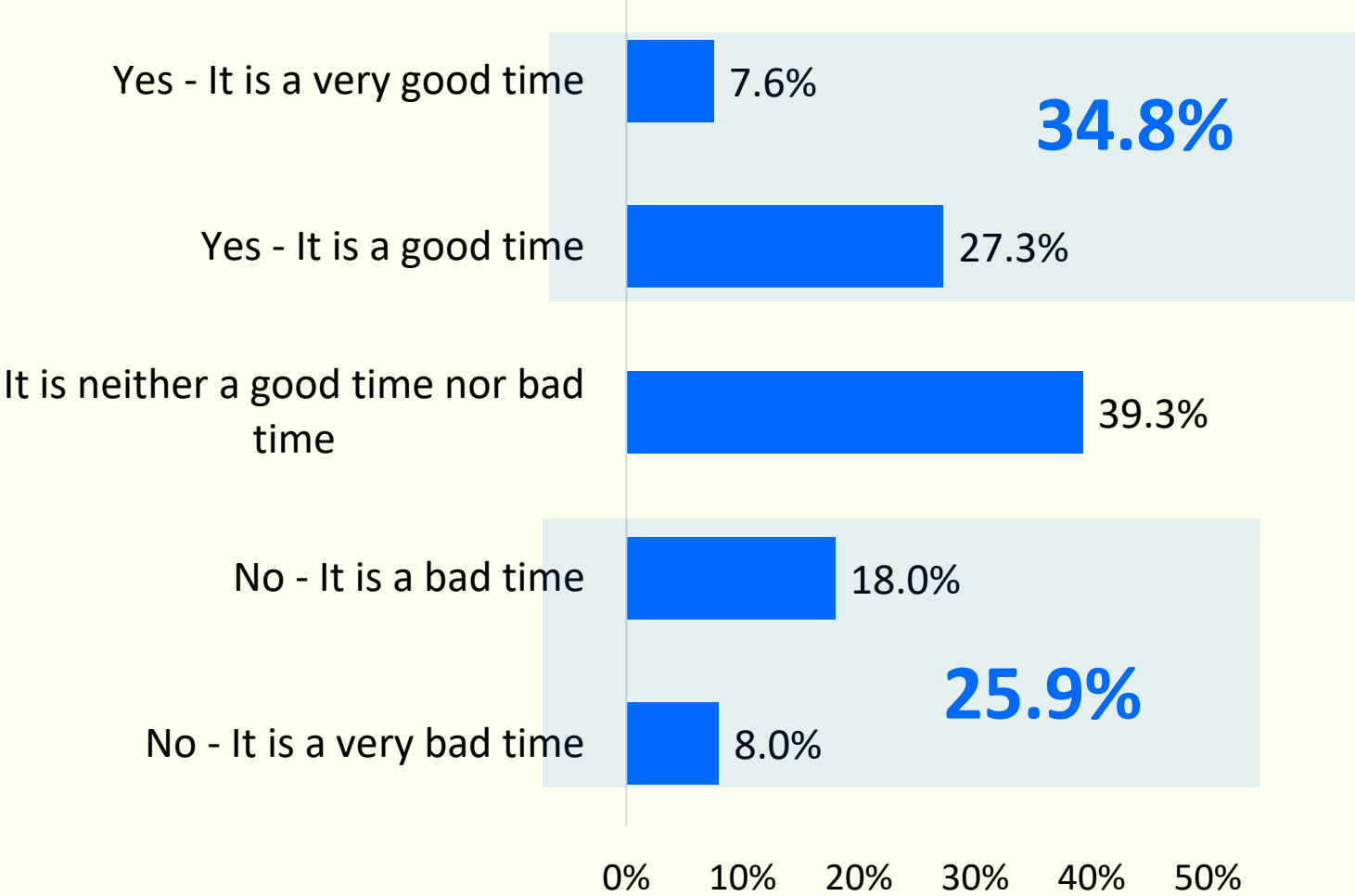
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Spending Confidence Also Increased in January

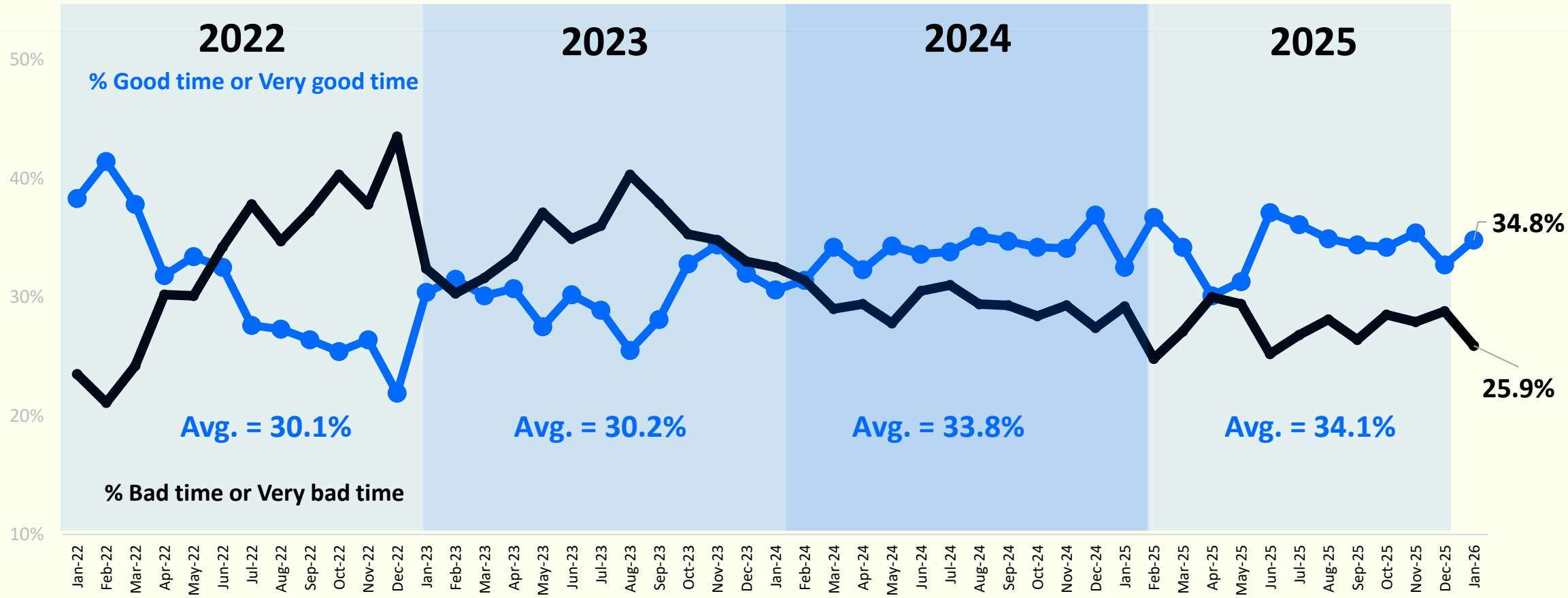
Question:

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 Also Increased in January

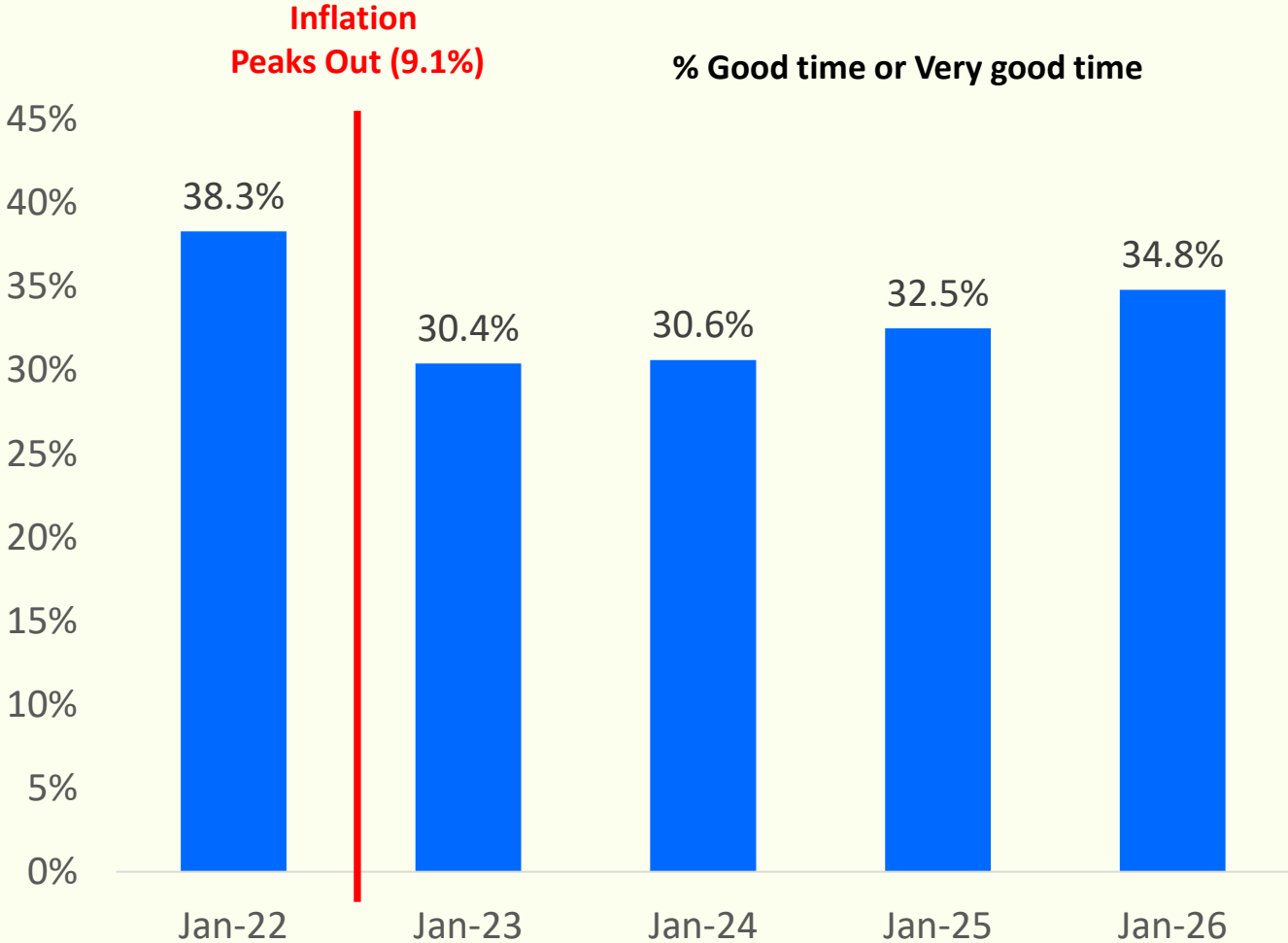
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Spending Confidence Increased in January

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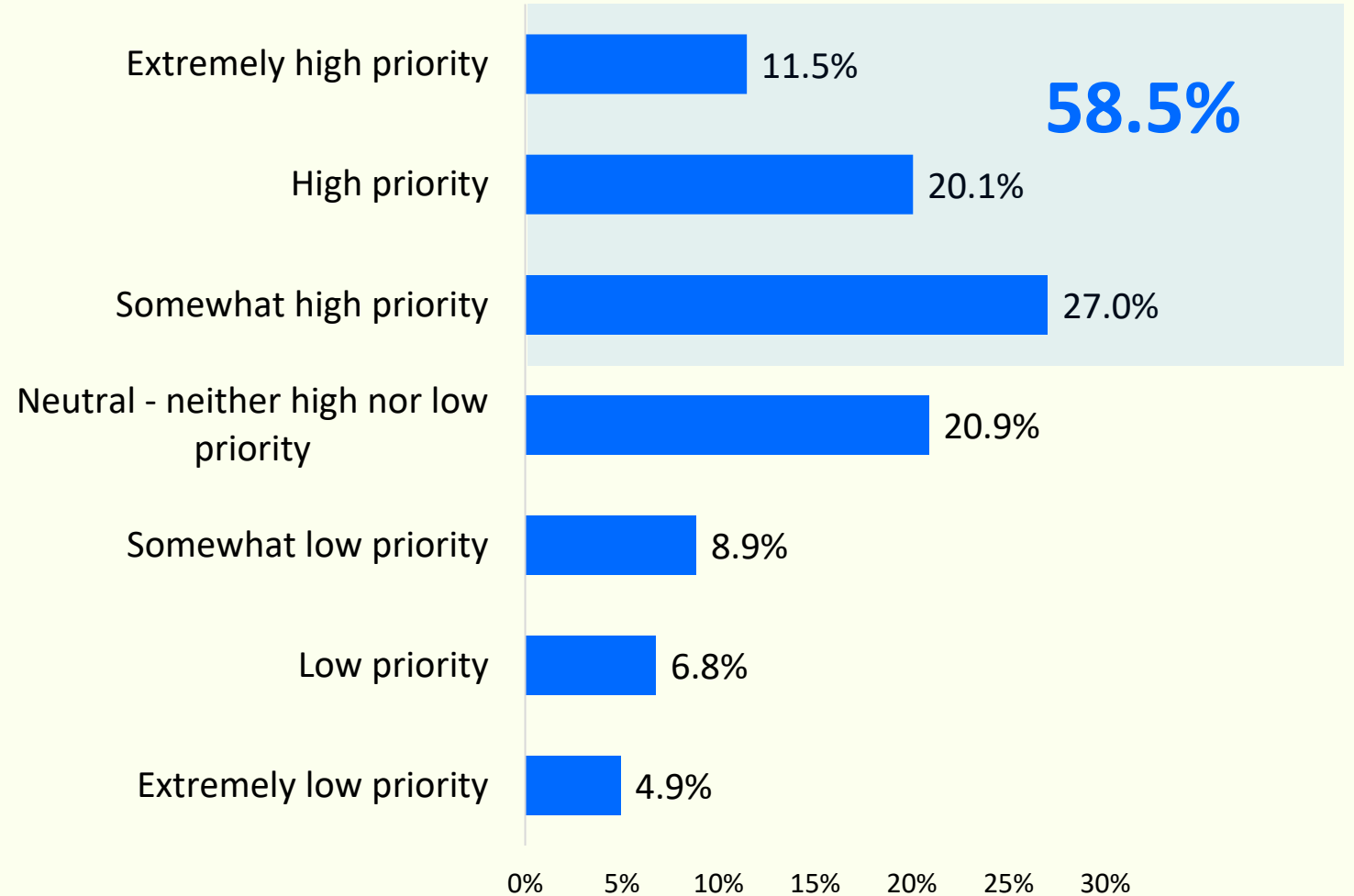
Travel Remains a Core Household Priority

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.

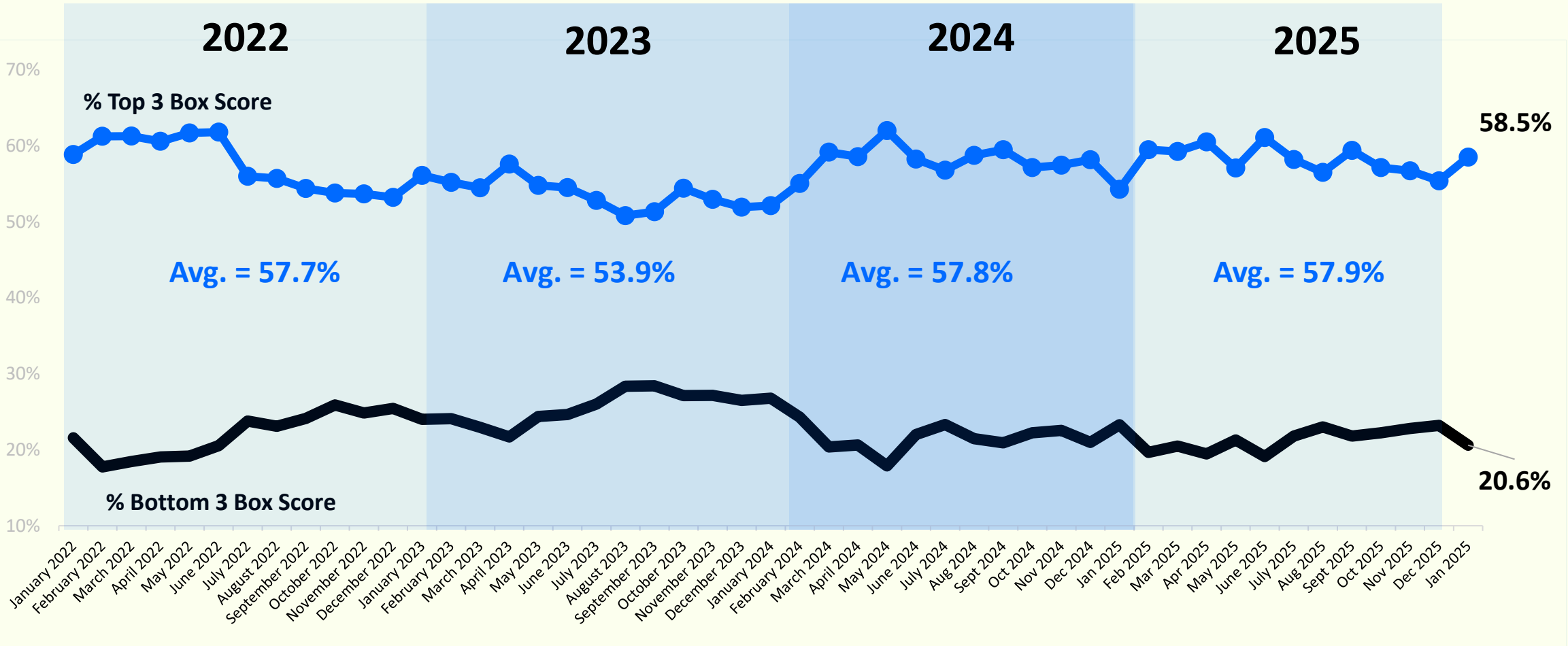
Leisure travel will be a(n)

_____.



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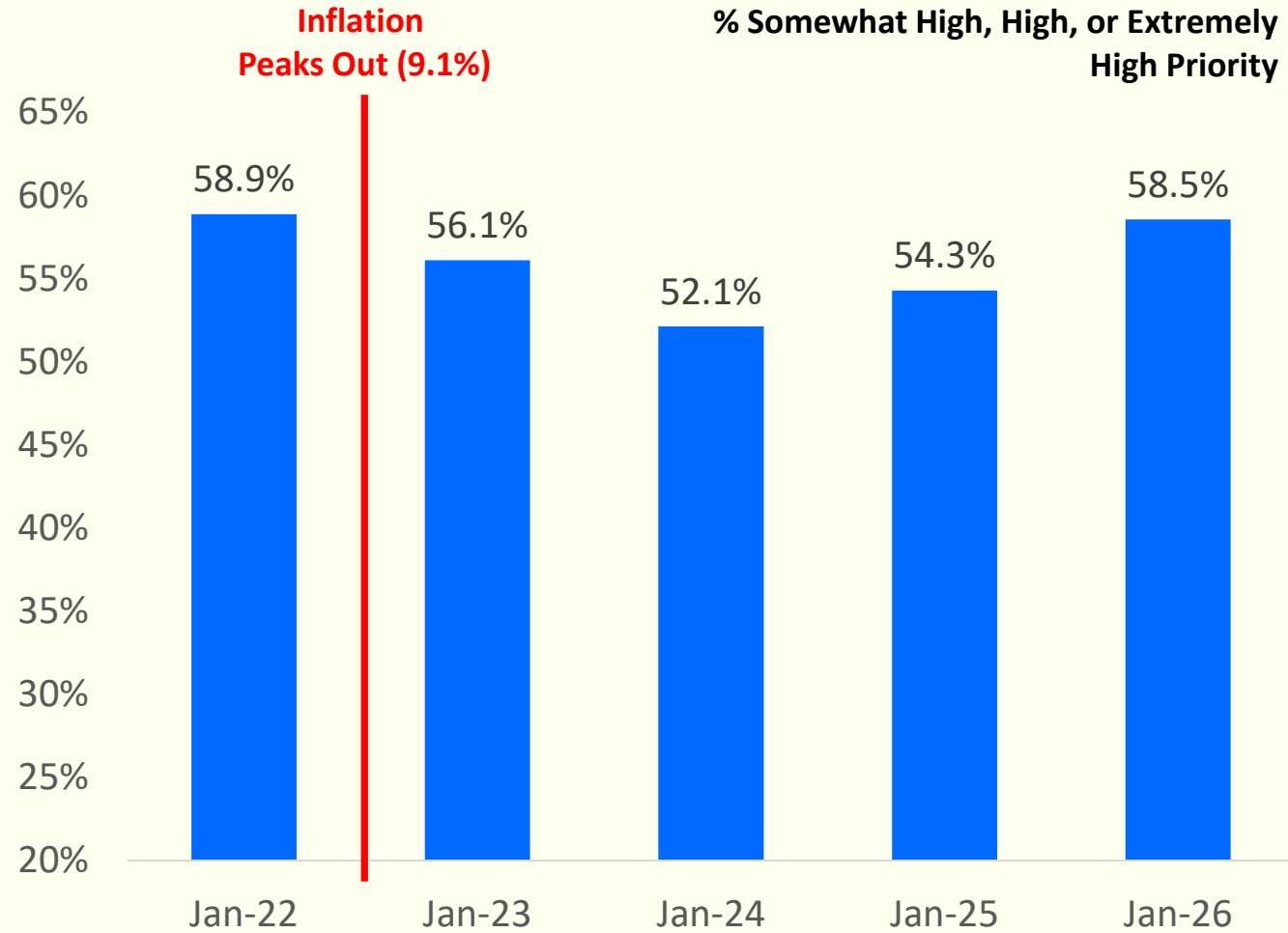


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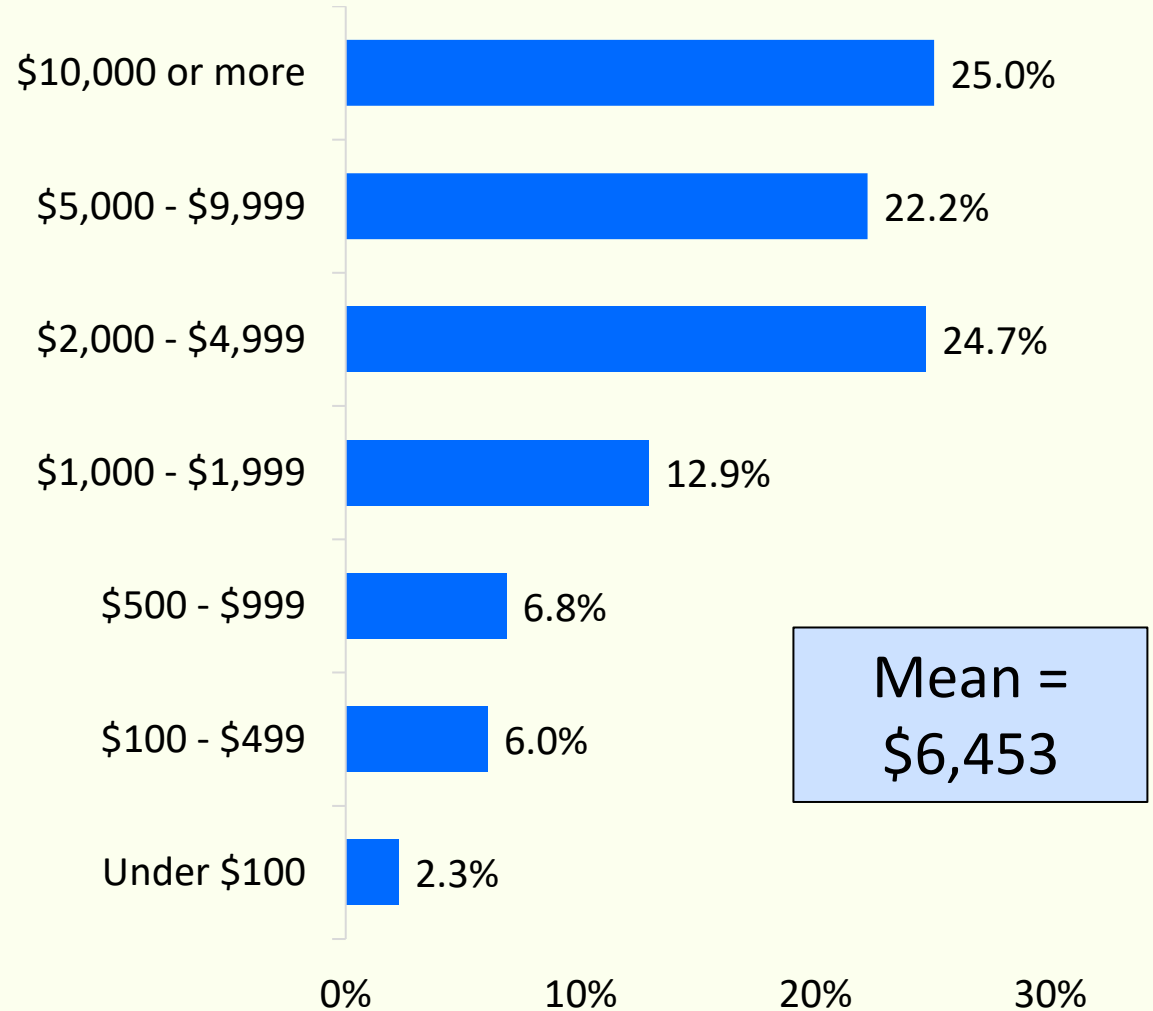
Leisure travel will be a(n)
_____.



The Average Anticipated Travel Budget is \$6,453

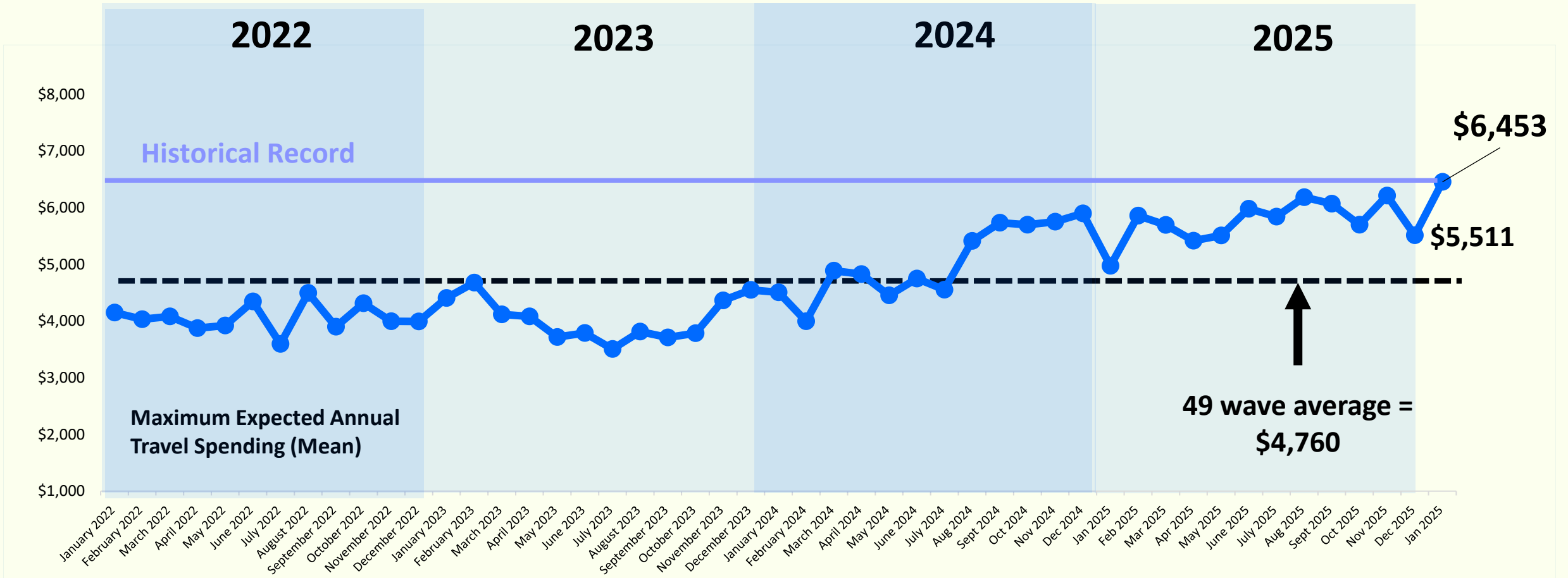
Question:

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?



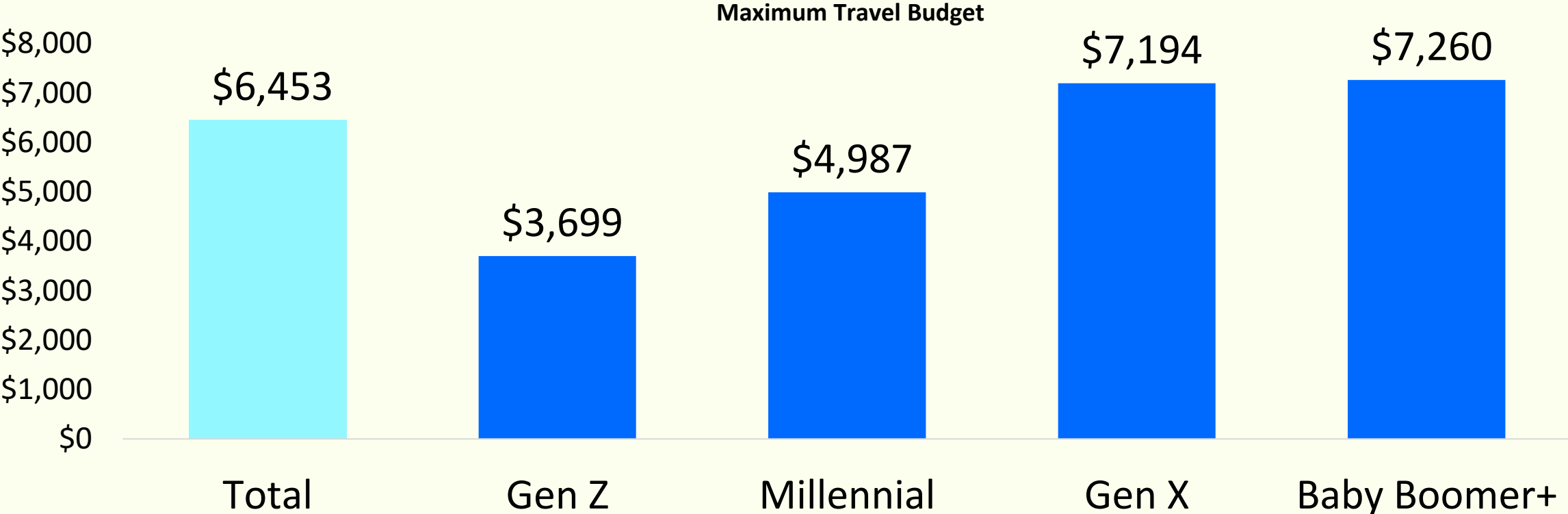
Anticipated Travel Budgets At Record Levels

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):



Maximum Travel Spending Next 12 Months by Generation

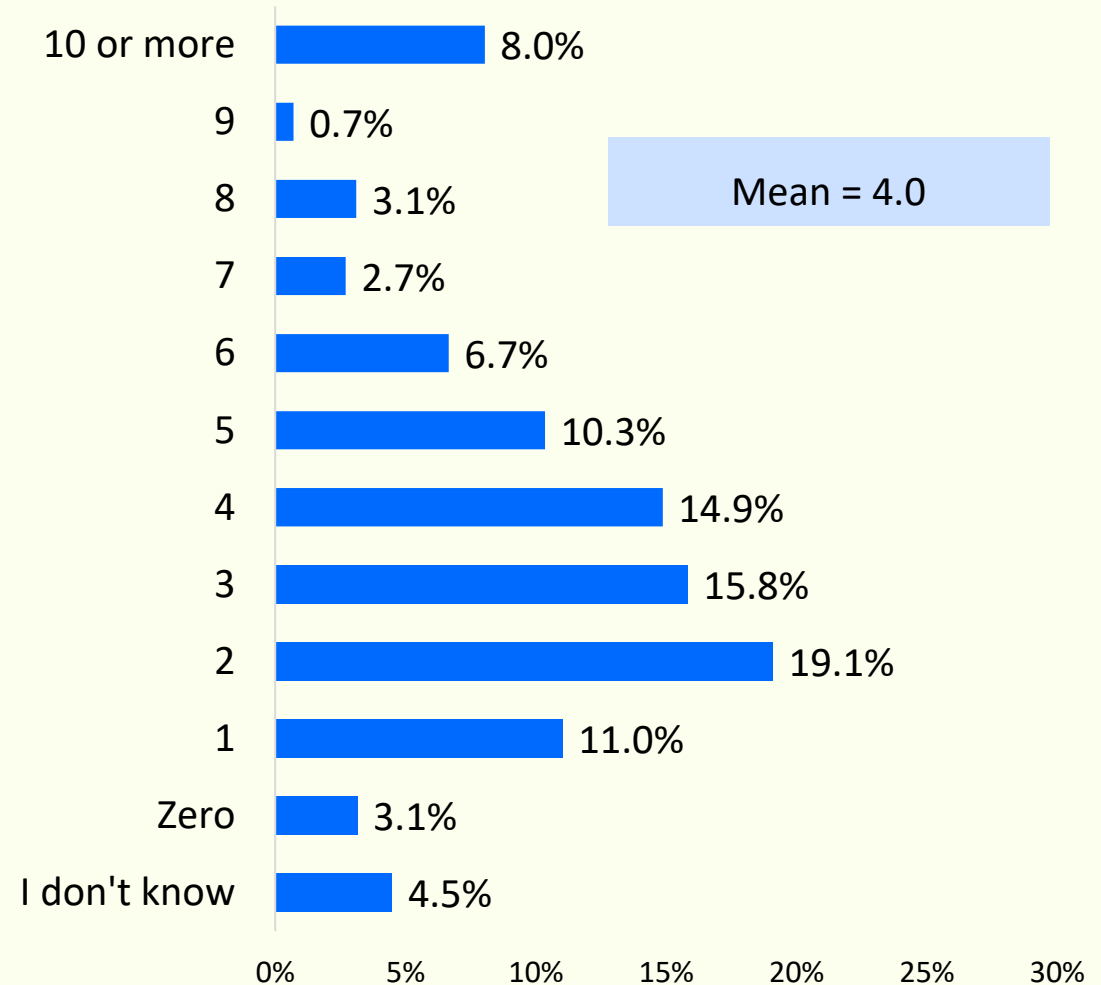
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months): _____



The Average American Traveler Expects to Take 4.0 Leisure Trips in 2026

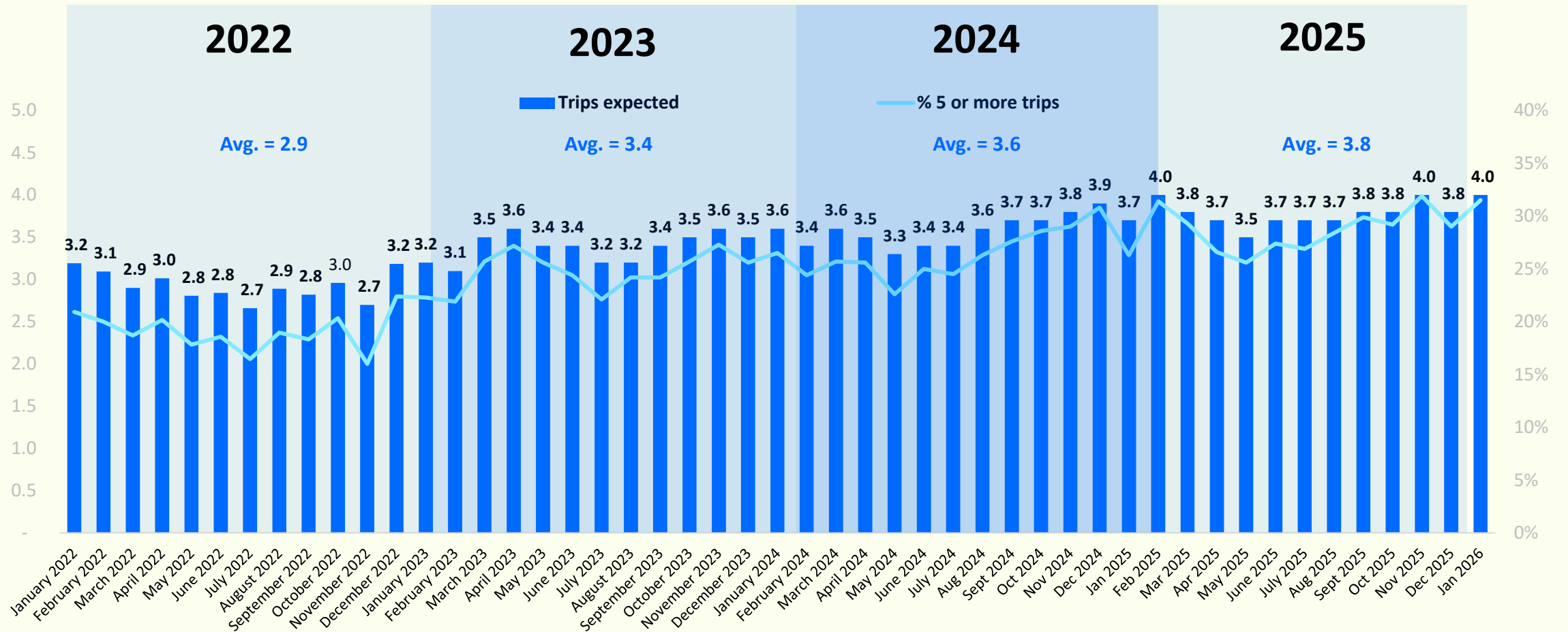
Question:

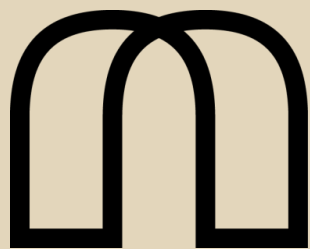
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



Expected Trip Volume Reaches Historic Levels

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?





Americans are planning more trips and higher travel spending in 2026, but still elevated recession concerns suggest this demand is resilient, not guaranteed, and will remain sensitive to economic shifts and perceived value.

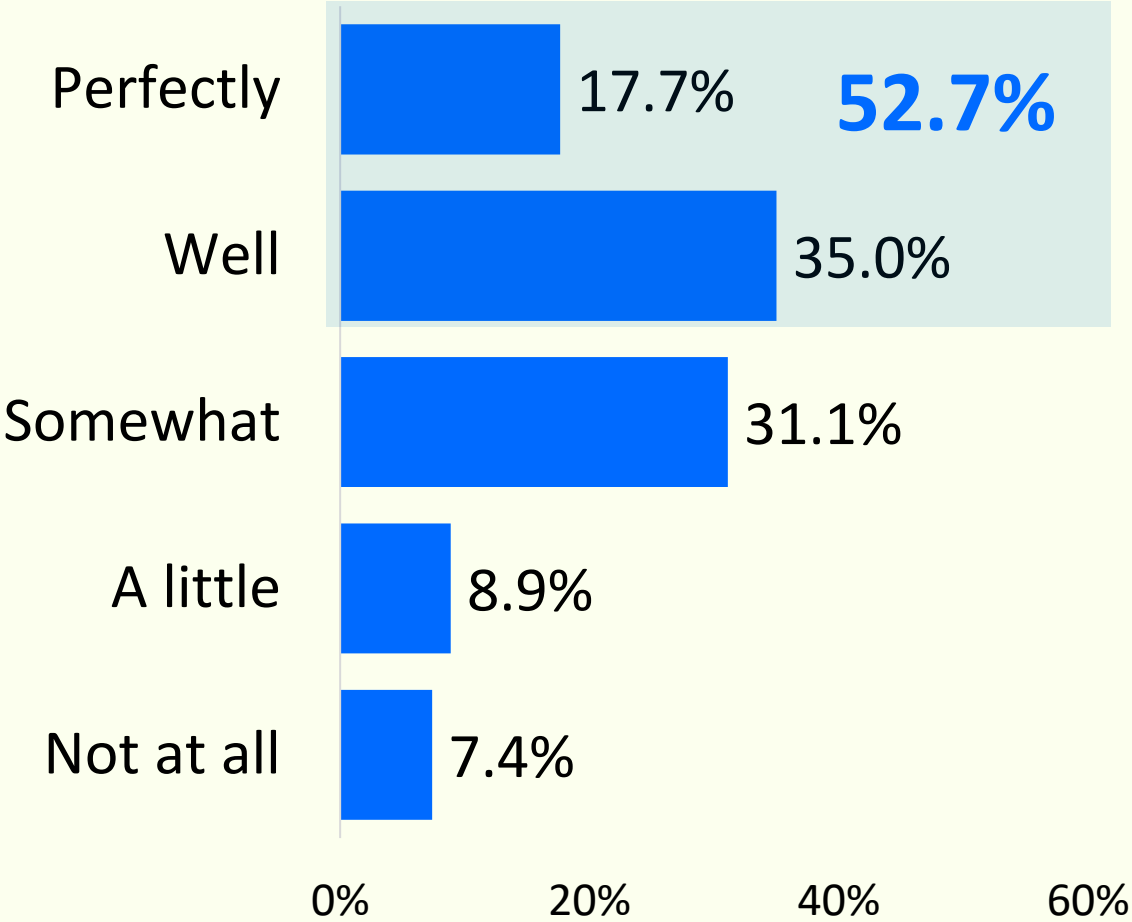
Recent Travel Priorities



Longer Stays During Recent Travel

Question: Tell us about your travel PAST TWELVE (12) MONTHS. How well do the following two statements describe your trips? (For each, select one to complete the sentence)

I have generally stayed longer in one place rather than hopping between many.



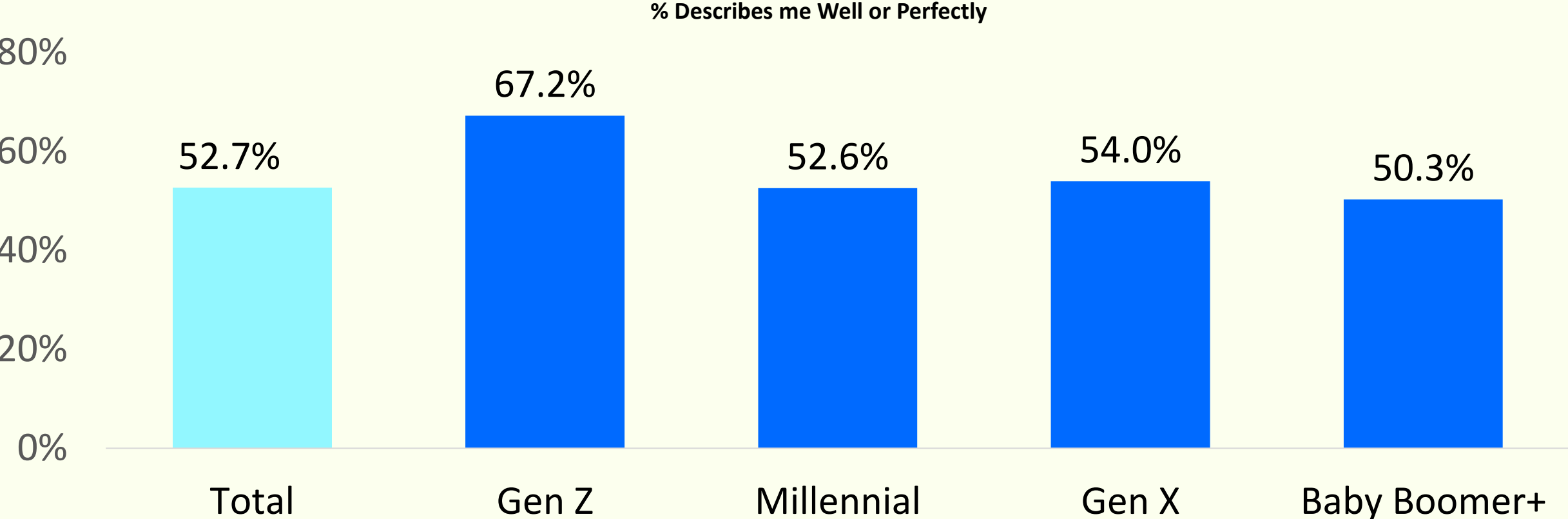
Poll: Which Generation Was Likeliest to Have Opted for Longer Stays During Recent Travel?



Gen Z, Millennial, Gen X,
or Boomer+

Longer Stays During Recent Travel by Generation

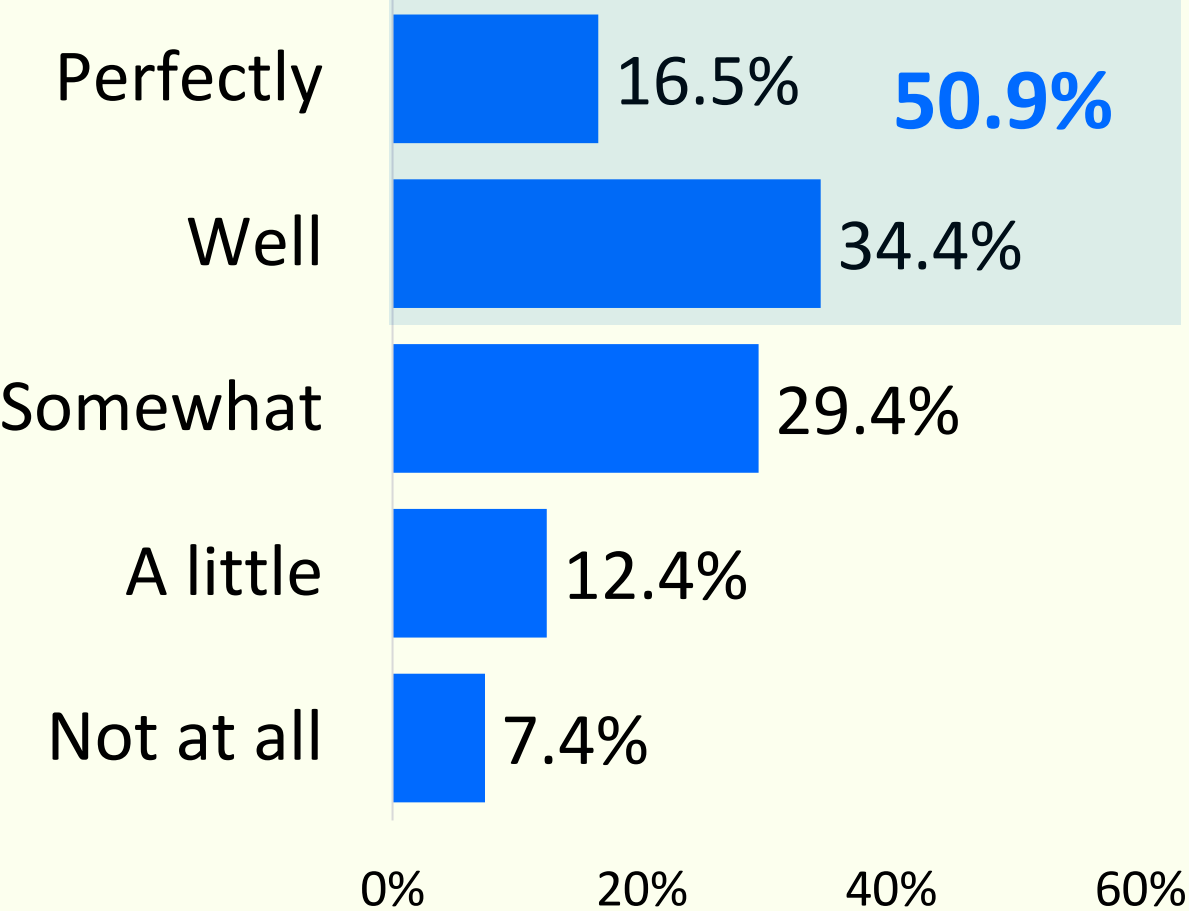
Statement: I have generally stayed longer in one place rather than hopping between many.



Immersion in Local Culture During Recent Travel

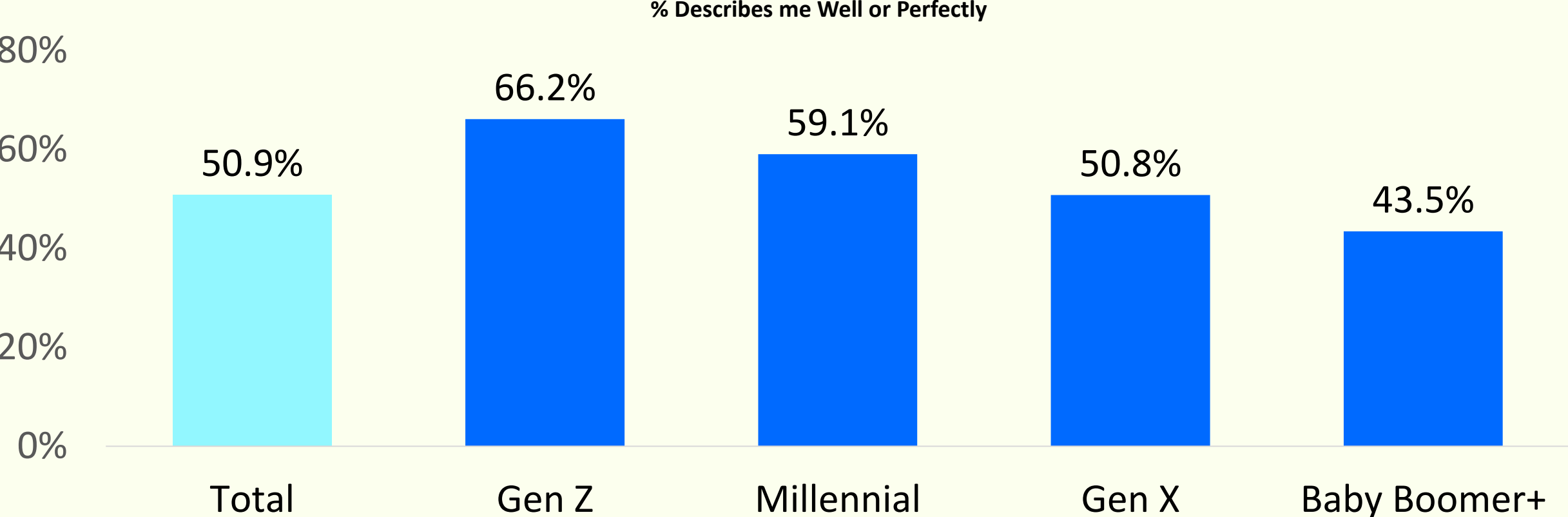
Question: Tell us about your travel PAST TWELVE (12) MONTHS. How well do the following two statements describe your trips? (For each, select one to complete the sentence)

I've tried to immerse myself in local culture, nature, and daily life.



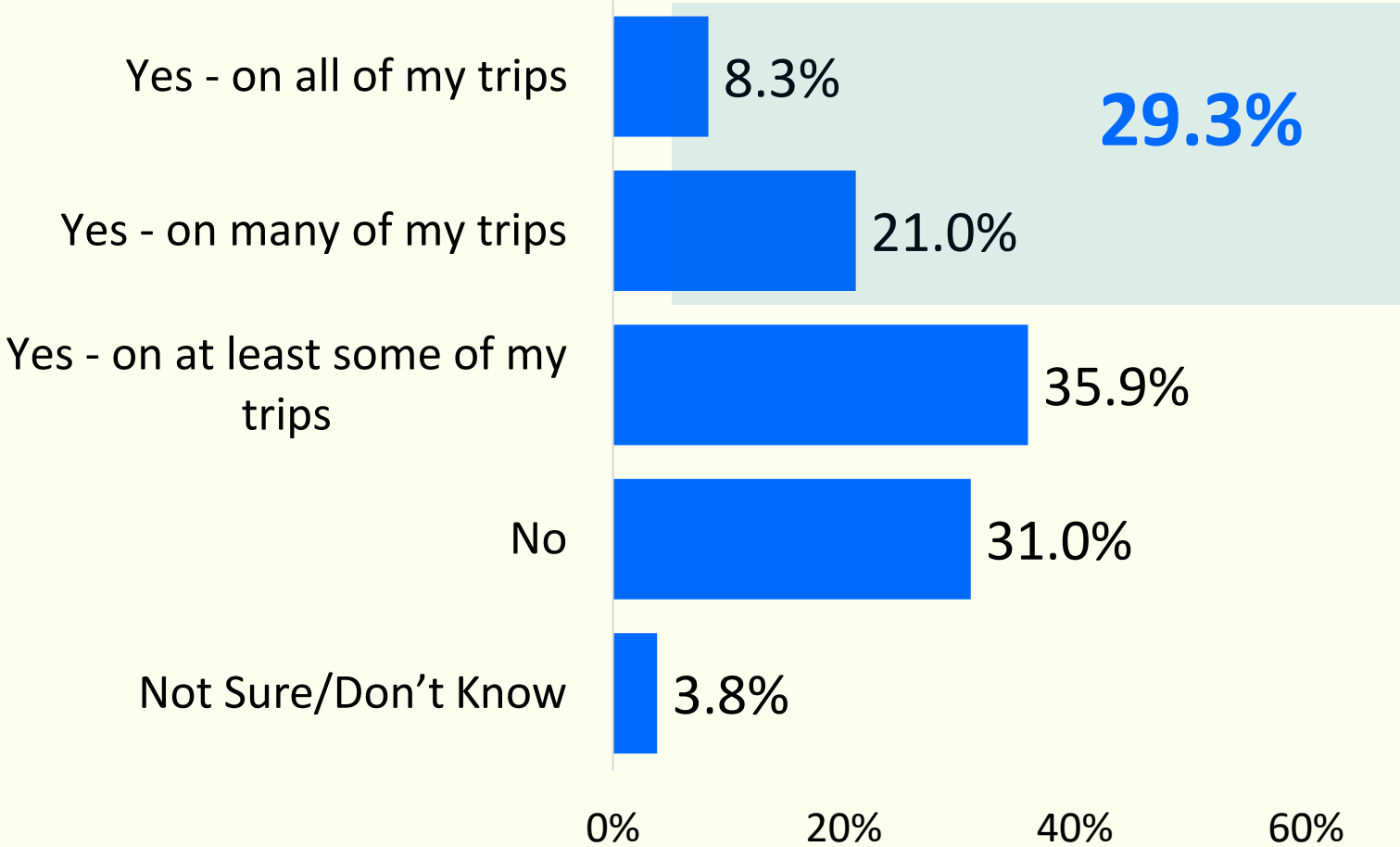
Immersion in Local Culture During Recent Travel by Generation

Statement: I've tried to immerse myself in local culture, nature, and daily life.



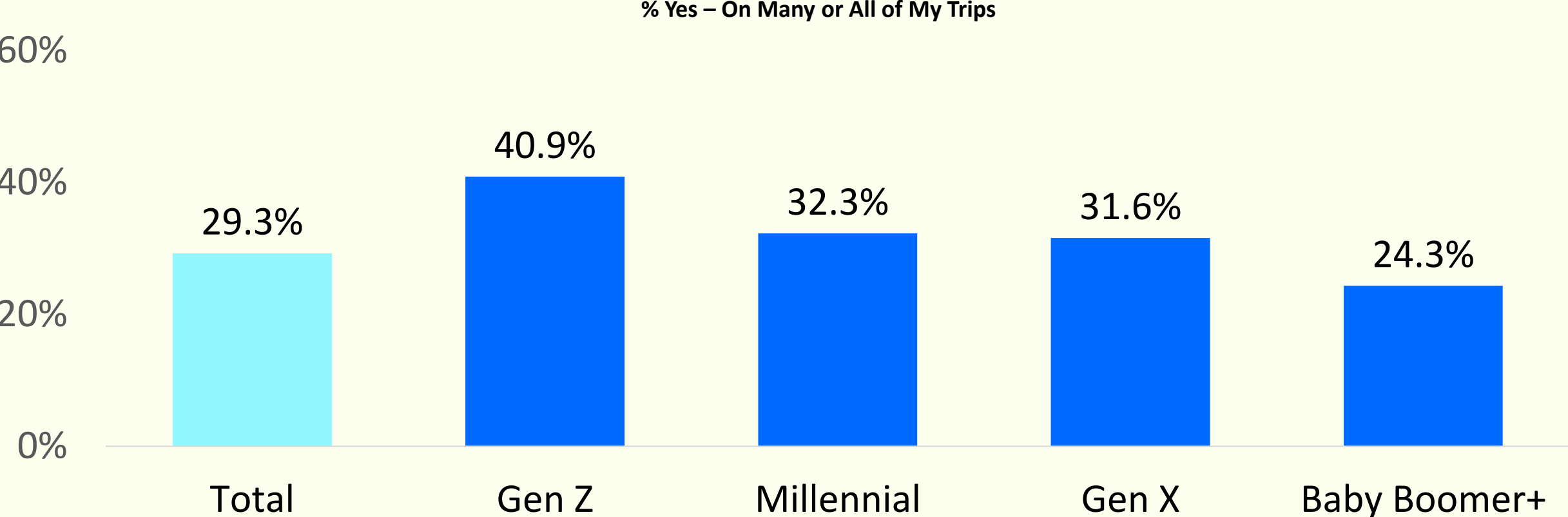
Exploring Lesser-Known Areas During Recent Travel

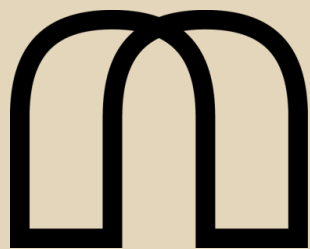
Question: In the PAST TWO (2) YEARS, have you gone out of your way to explore lesser-known areas, neighborhoods or attractions while traveling?



Exploring Lesser-Known Areas During Recent Travel by Generation

Question: In the PAST TWO (2) YEARS, have you gone out of your way to explore lesser-known areas, neighborhoods or attractions while traveling?

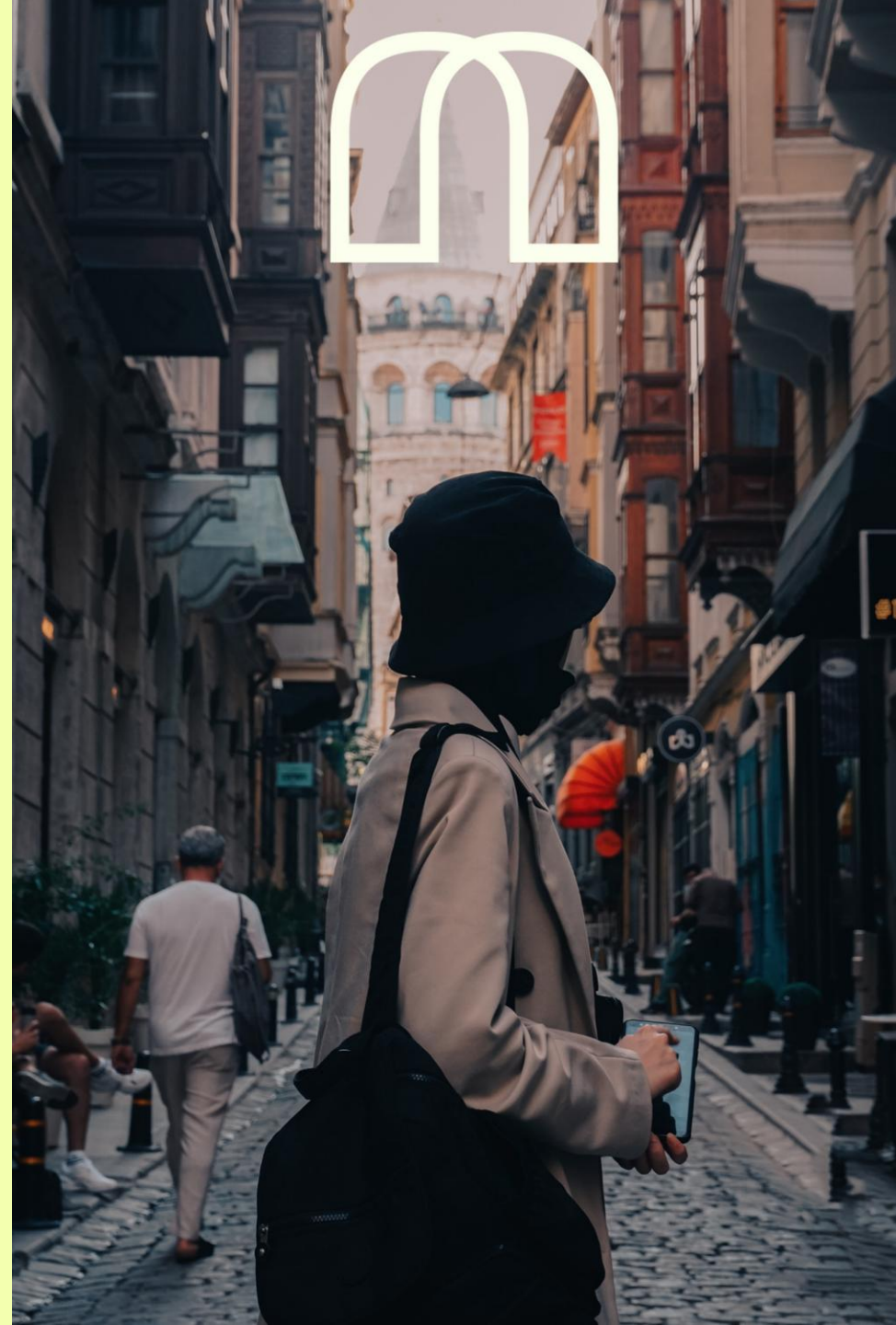




All together, these findings underscore a consistent theme: even amid financial caution and external uncertainties, demand for travel remains resilient, well-funded, and increasingly purposeful.

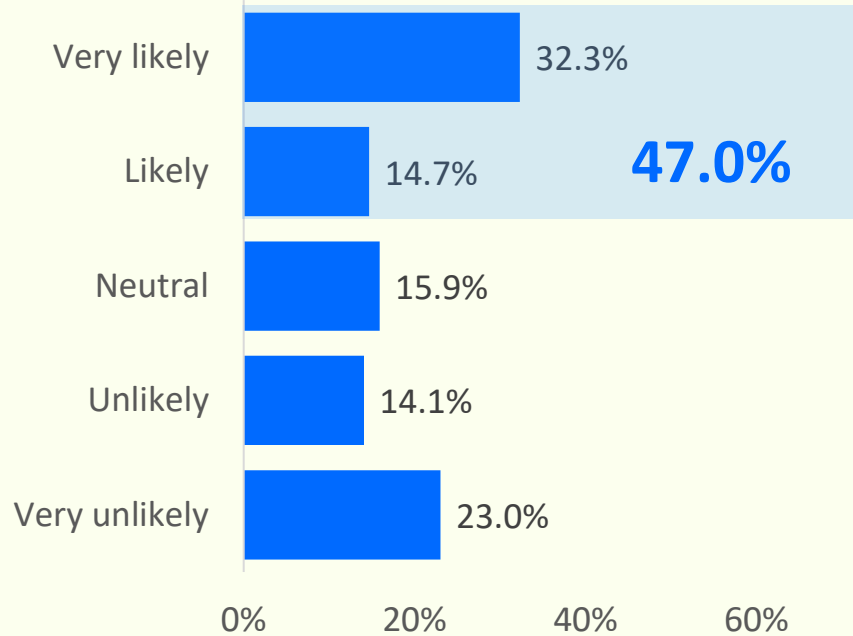


Spotlight: Outbound & Inbound Global Travel Intentions

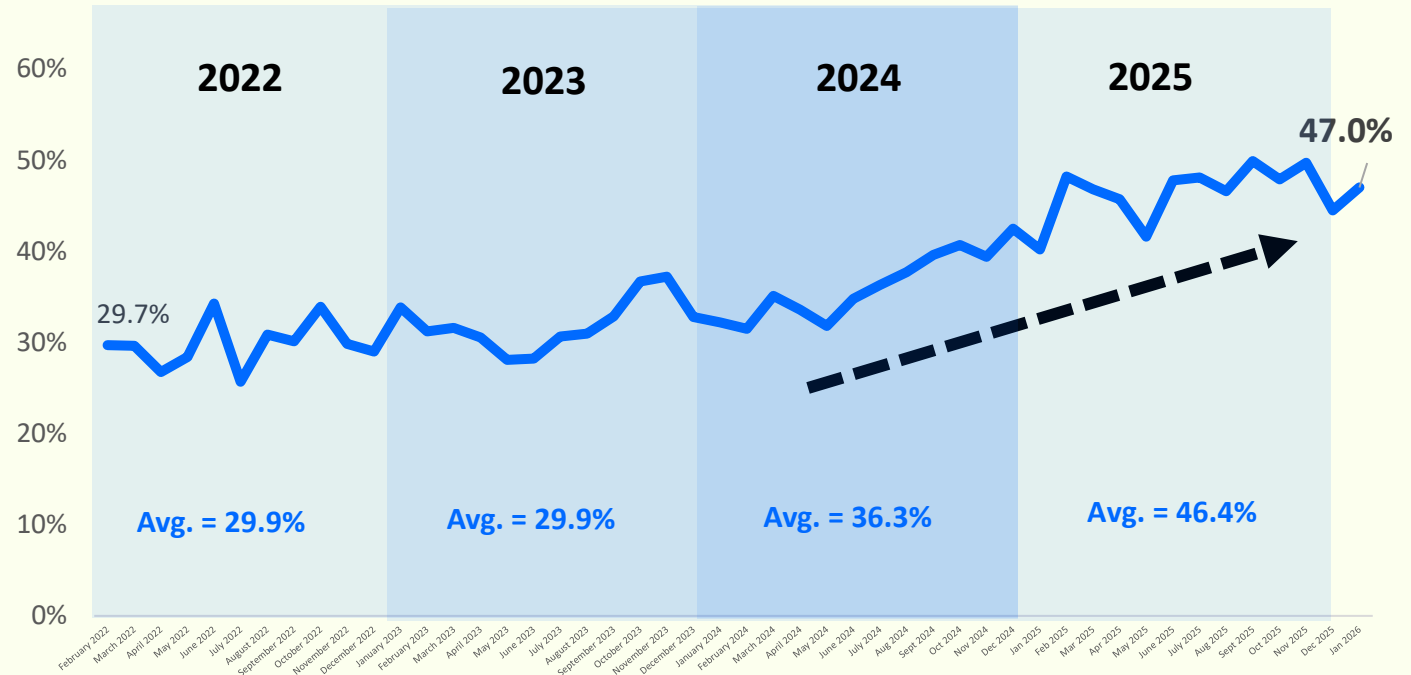


International Travel Intentions Remain Strong

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



% Likely or Very Likely *Historical data*



Methodology

- Annual tracking survey
- New this year: Quarterly 2026 Pulse Surveys
- Survey is professionally translated into the native language of each country and field tested amongst native speakers.
- Tracks global traveler sentiment, international trip desires, planning and inspiration content preferences, and U.S. brand insights
- Survey collected: [January 5 - 15, 2026](#)
- N=800 per market, 12,800 total sample
- Screened for likelihood to travel internationally in the next 3 years. Had to respond as likely or very likely. All others were terminated.



Markets of Study:

Americas:

Canada, Mexico, Argentina, Brazil, Colombia

Europe:

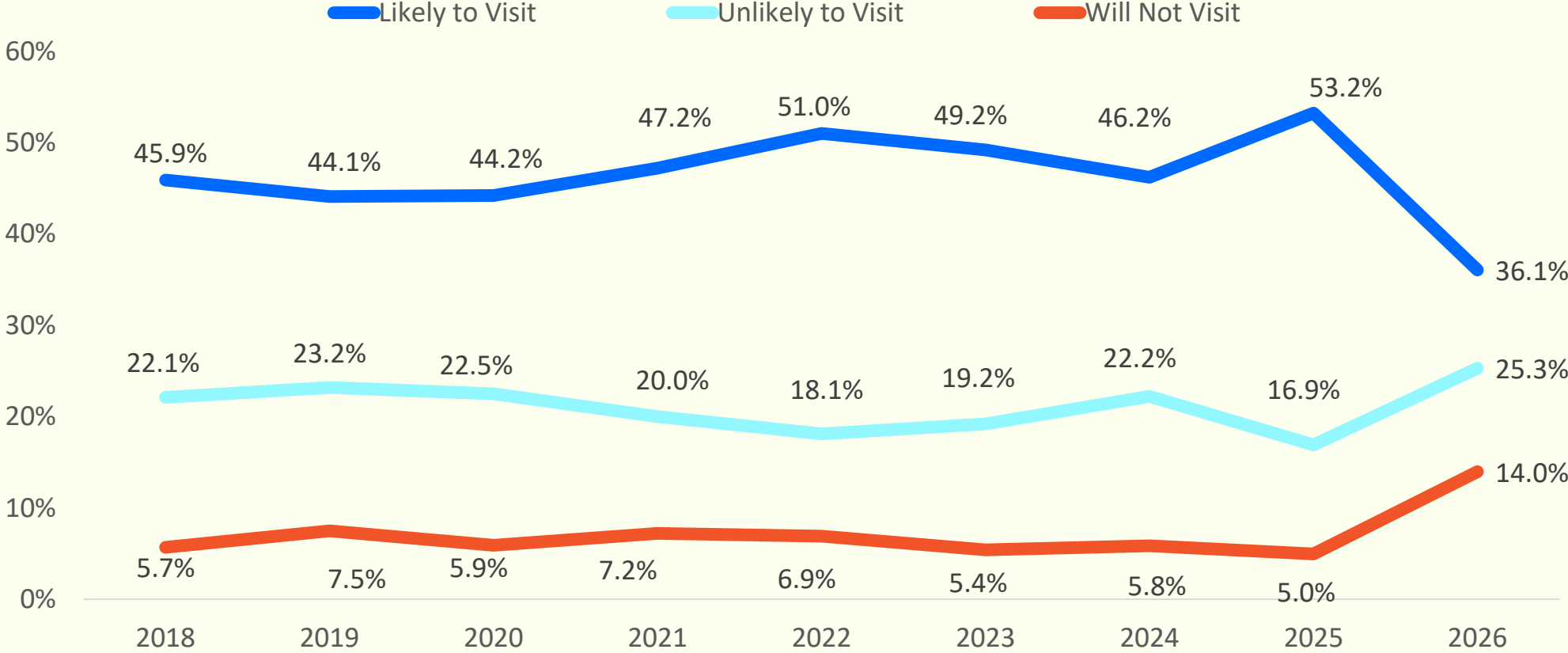
France, Germany, Italy, Netherlands, Spain, United Kingdom

Asia-Pacific:

Australia, China, India, Japan, South Korea

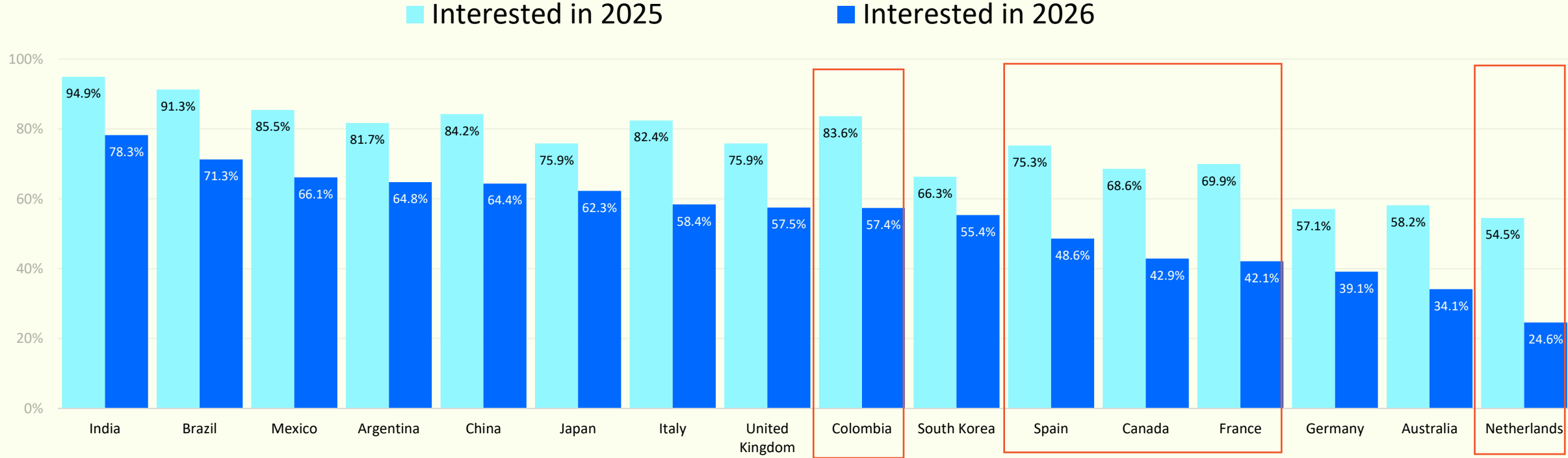
U.S. Opportunity: Likelihood of Visiting the U.S.

Likelihood to the Visit the U.S. in the Next 2 Years – 2018-2026 (Total Aggregate)



U.S. Opportunity: Interest in Visiting the U.S.

Interest in Visiting the U.S. in the Next 2 Years – 2025 vs. 2026 (Change By Market)



Webinar: The State of the International Traveler

February 26, 2026
12pm PT/3pm ET



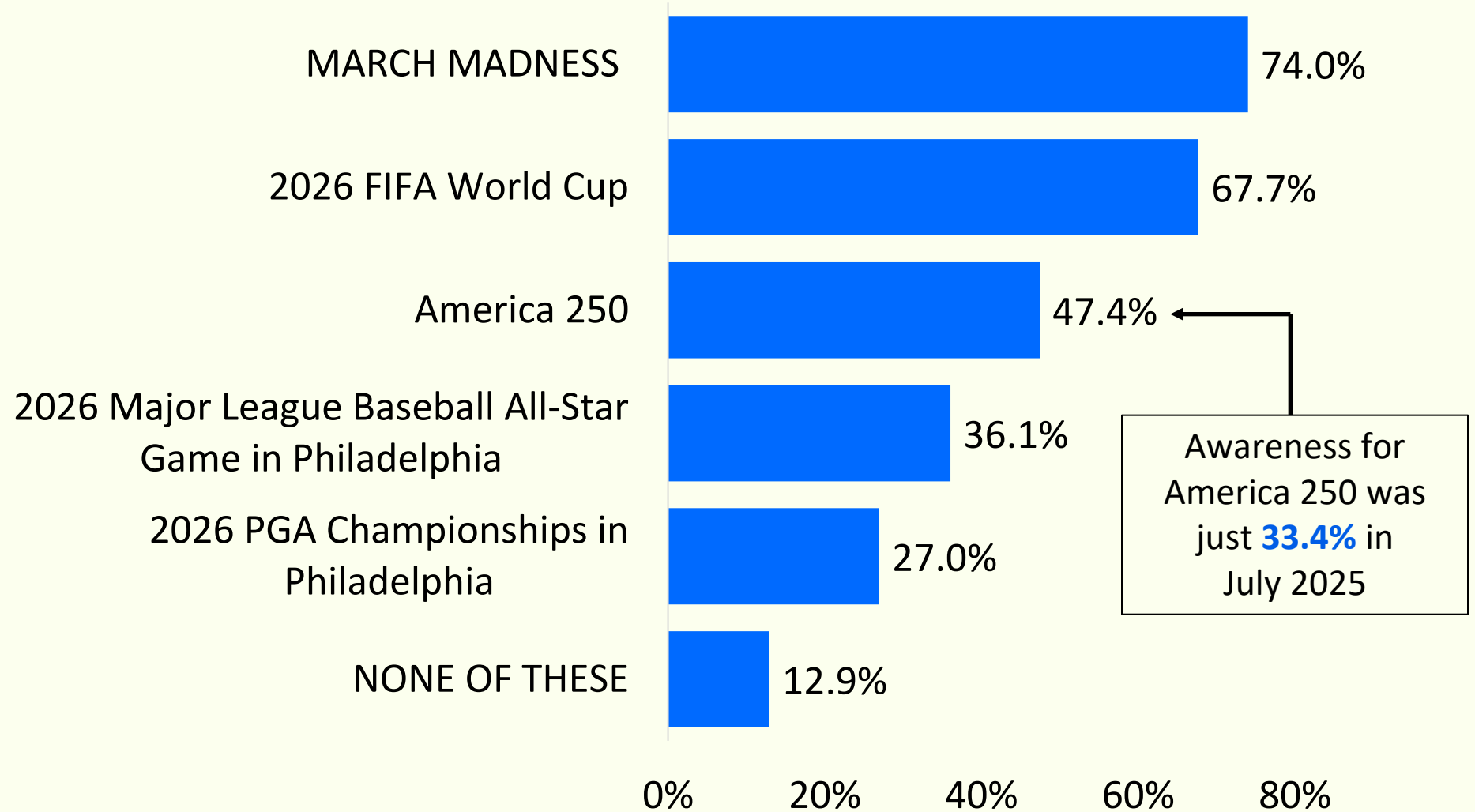
Upcoming Major Events Travel



Upcoming Event Awareness

Question:

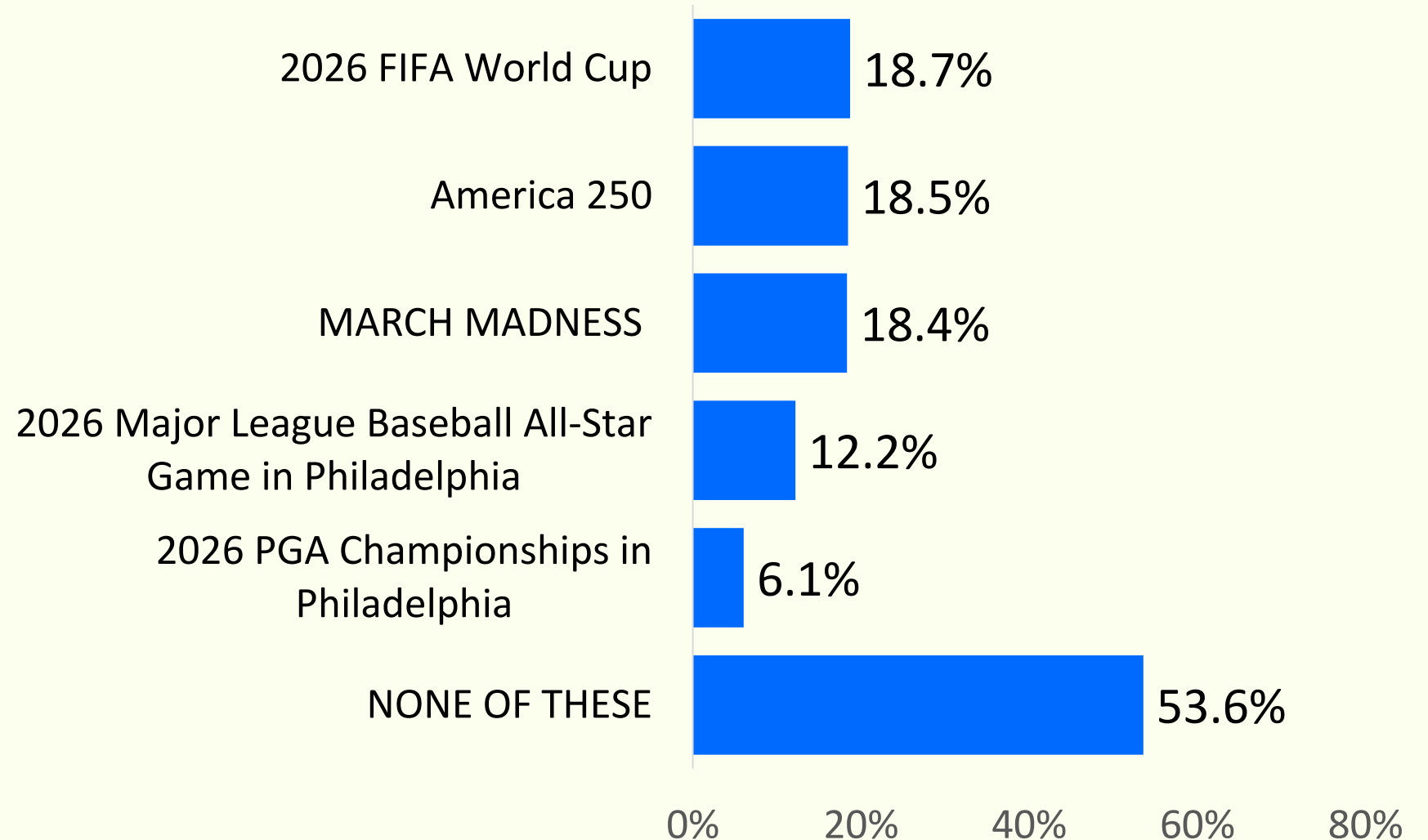
Prior to taking this survey, which of the following upcoming events have you heard of? (Select all that apply)



Upcoming Event Travel Interest

Question:

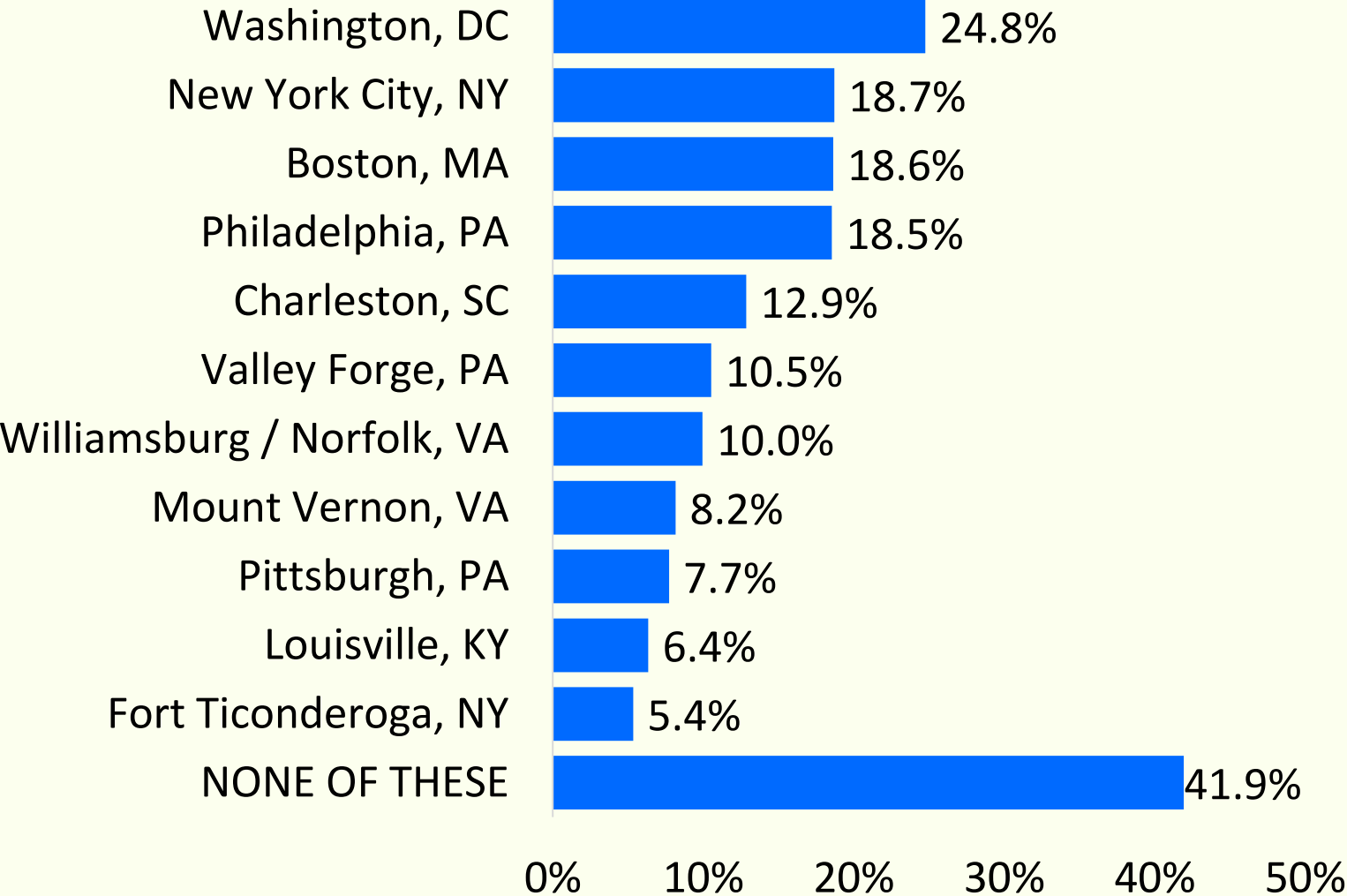
Which of the following upcoming events are you interested in traveling to attend? (Select all that apply)



America 250 Destination Interest

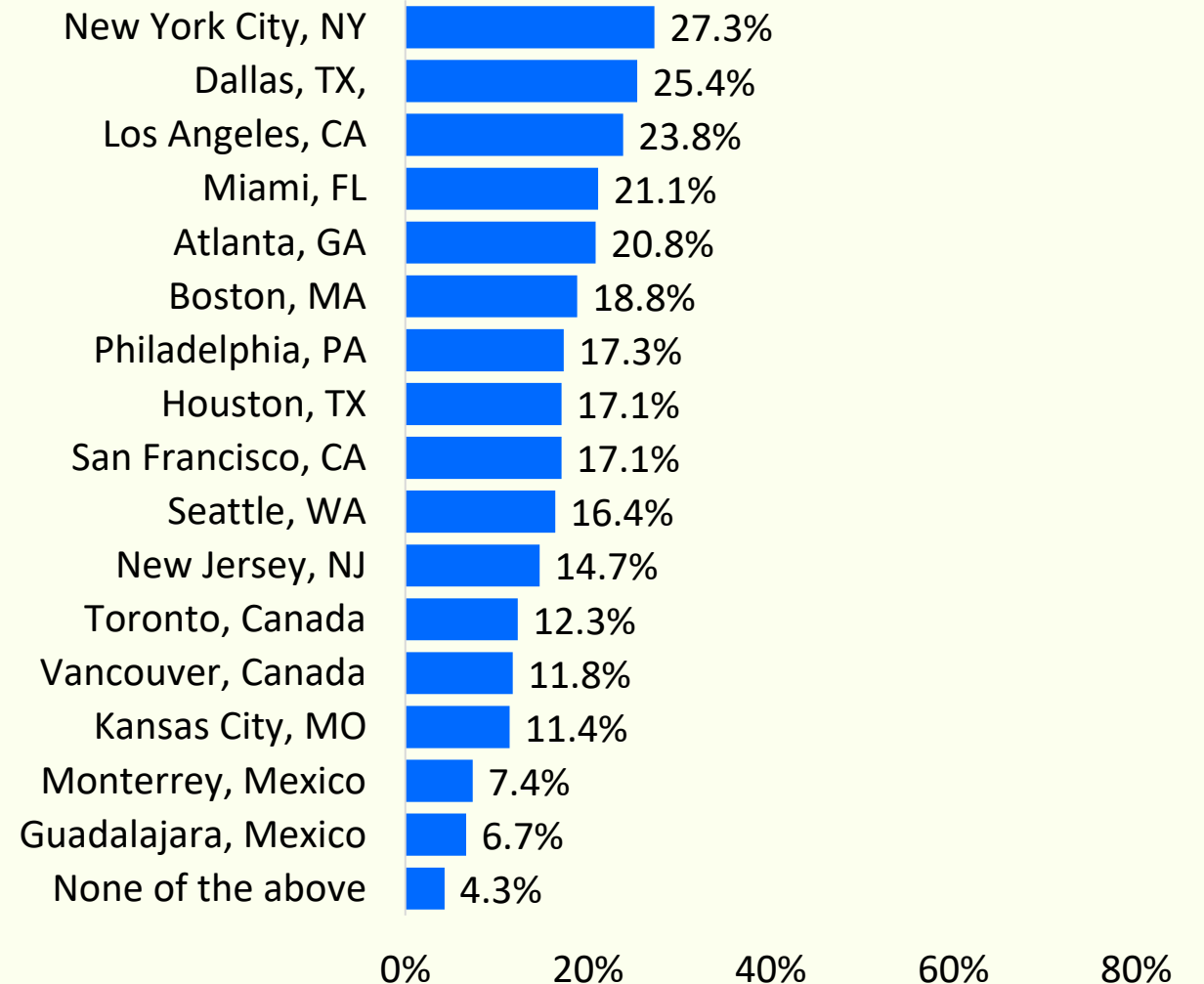
Question:

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



Interest in Traveling to a 2026 FIFA World Cup Event Destination

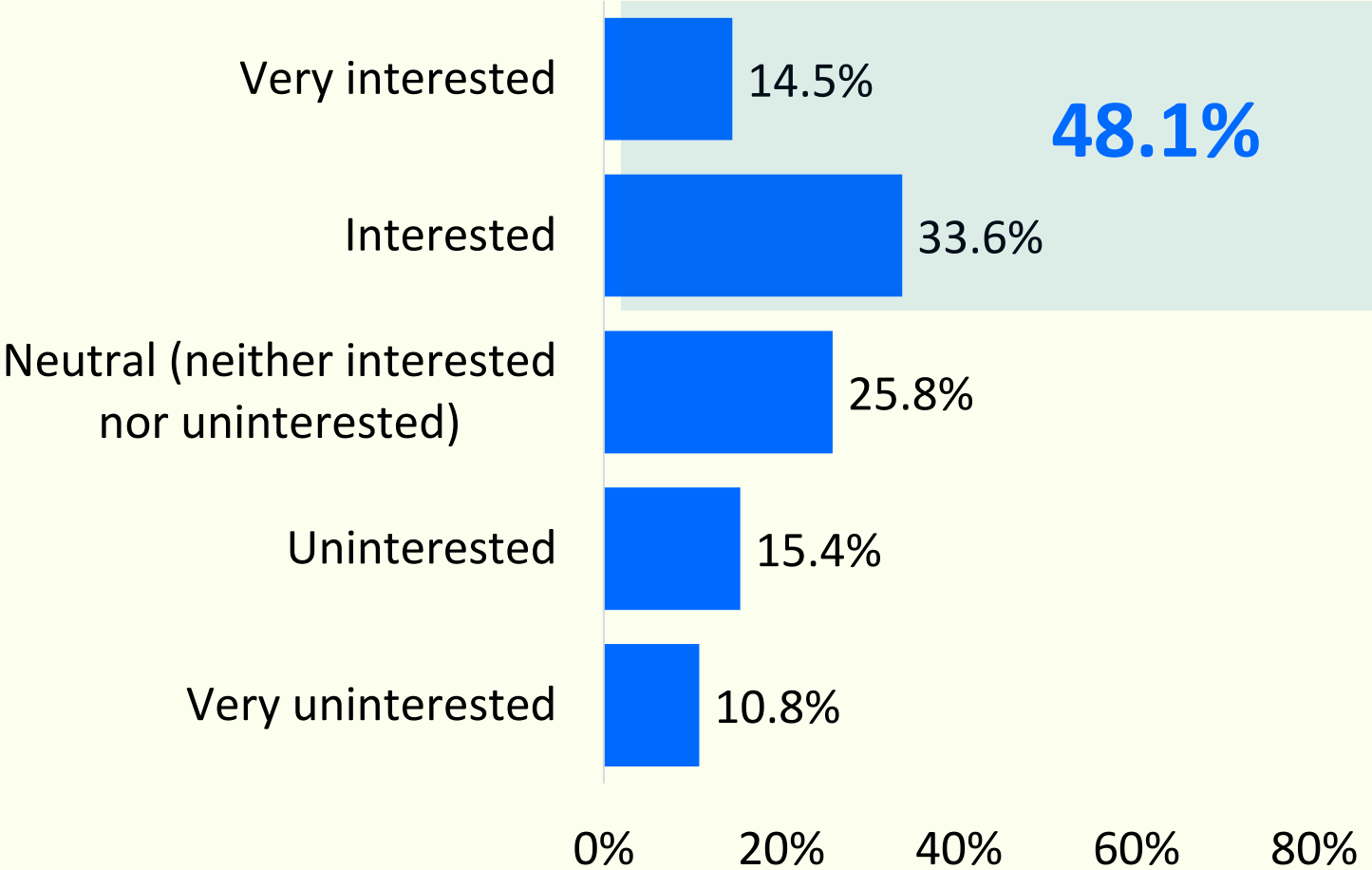
Question: Which of the following destinations are you interested in traveling to attend a 2026 FIFA World Cup event(s)?



Interest in Traveling to Attend a Route 66 Anniversary Event

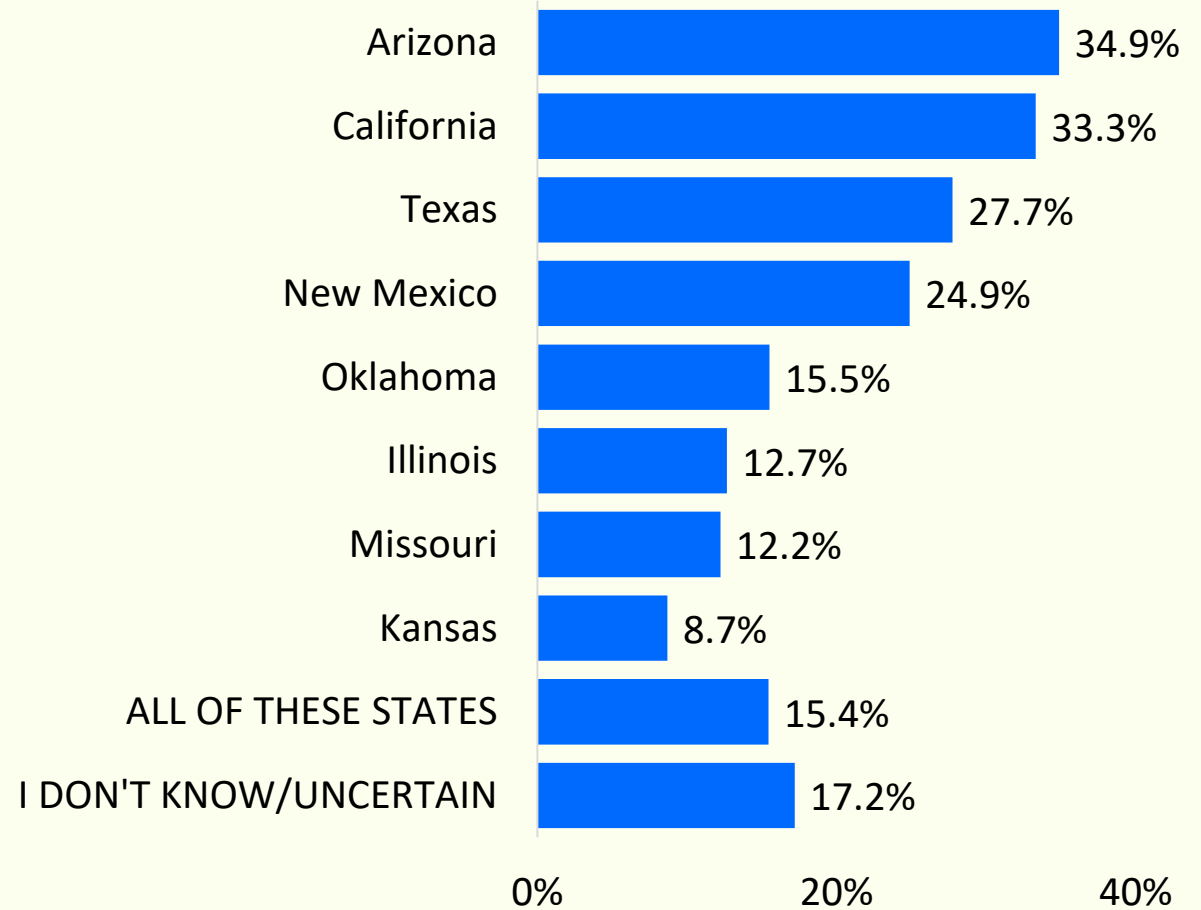
Question: Route 66 is celebrating its centennial anniversary in 2026, marking 100 years since its establishment. Each of the eight states along Route 66 is planning its own celebratory events and activities, including car shows, festivals, and cultural experiences.

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



Interest in Traveling to a Route 66 Anniversary Destinations

Question: Which states would you be likely to visit on a Route 66 Anniversary trip?



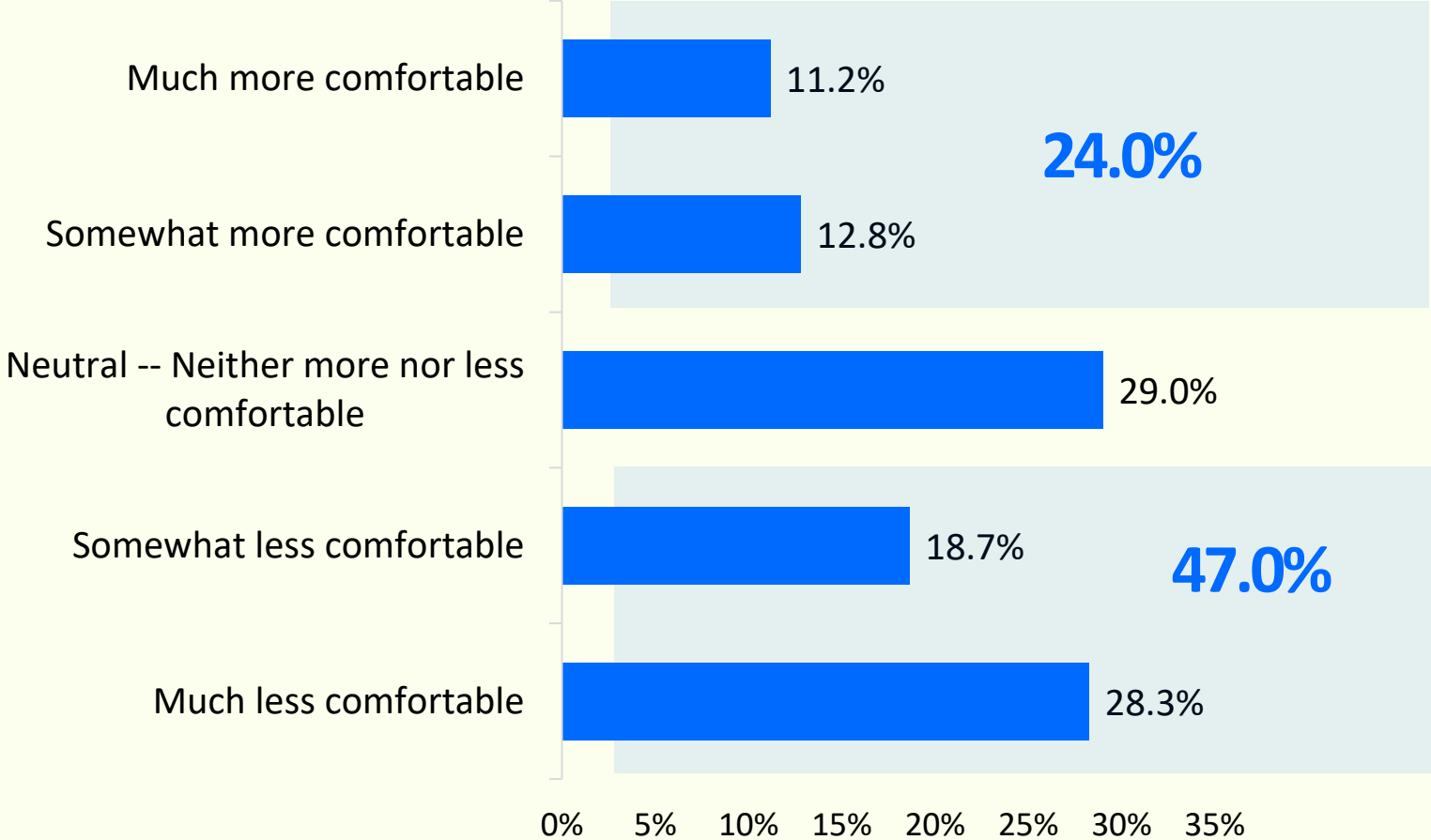


Travel in Challenging Times

Nearly half feel elevated discomfort due to federal personnel in urban destination.

Question:

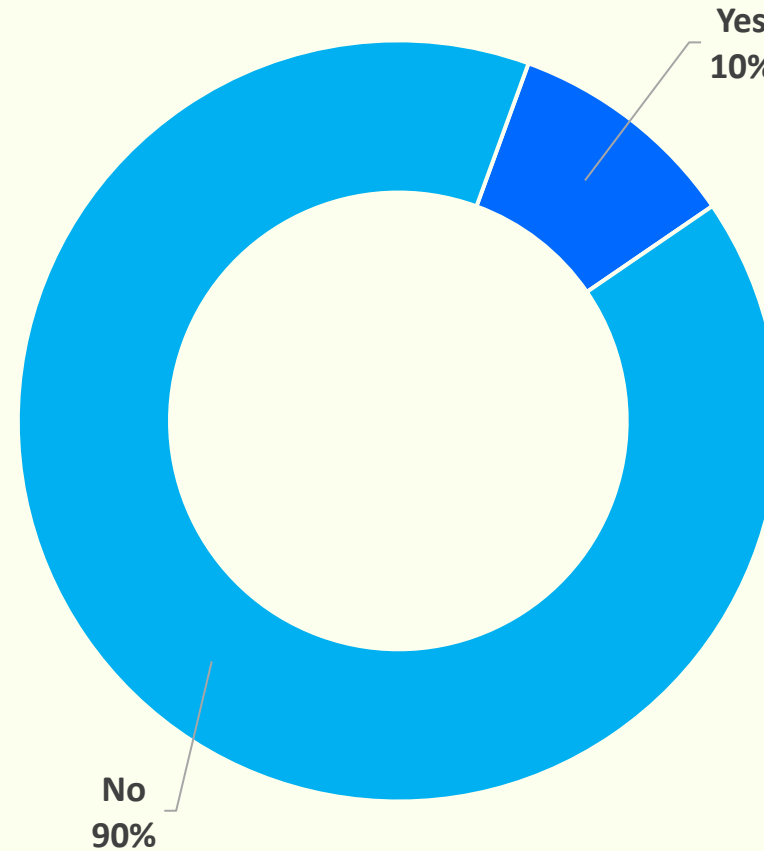
In some U.S. cities, the presence of federal immigration, military or law-enforcement personnel in public spaces has recently increased. How does this make you feel about visiting those cities?



1-in-10 American Travelers Have Already Acted to Avoid Visiting These Destinations

Question:

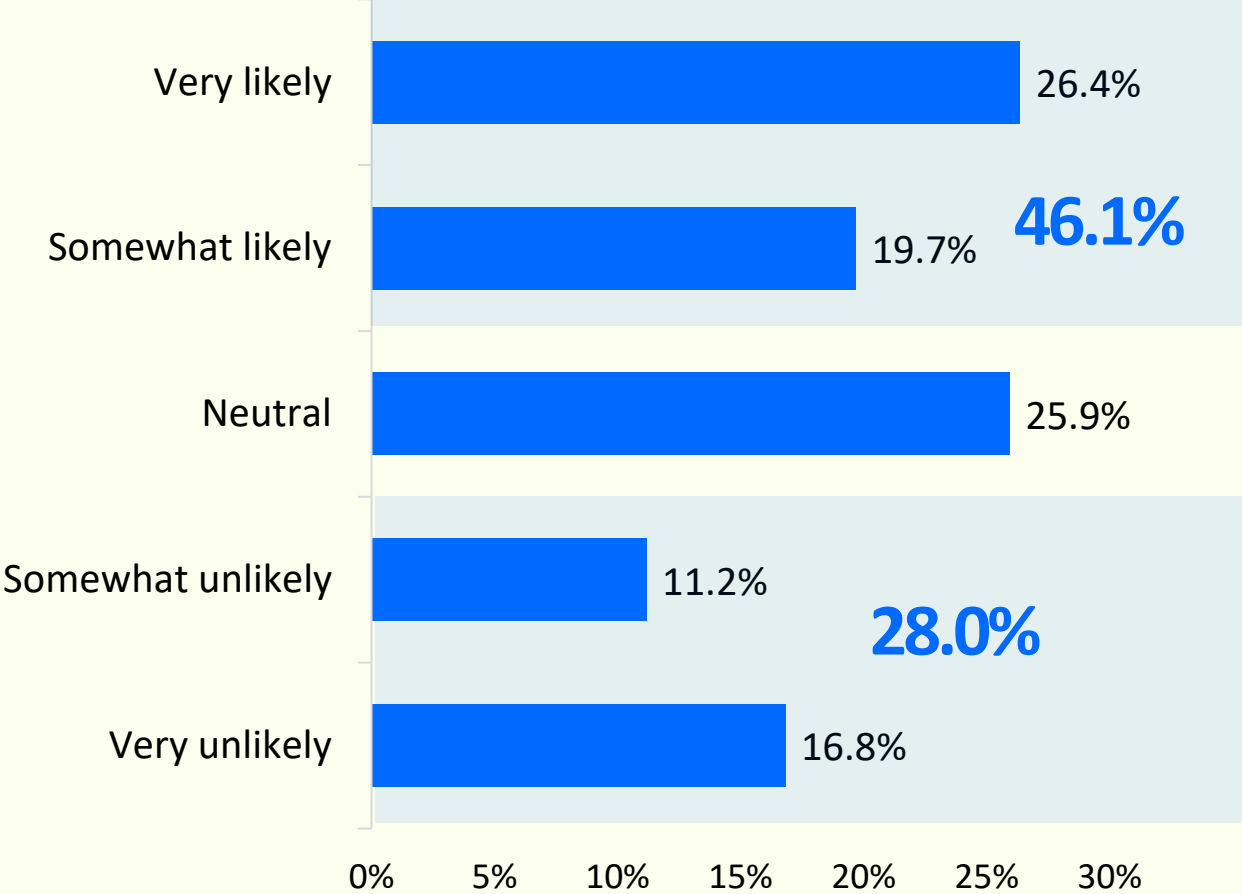
In the PAST TWELVE (12) MONTHS, have you changed any of your travel plans due to federal law enforcement/Immigrations and Customs Enforcement (ICE) activity in any U.S. cities you had previously considered visiting?



Nearly Half Also Say They Are Likely to Avoid These Destinations

Question:

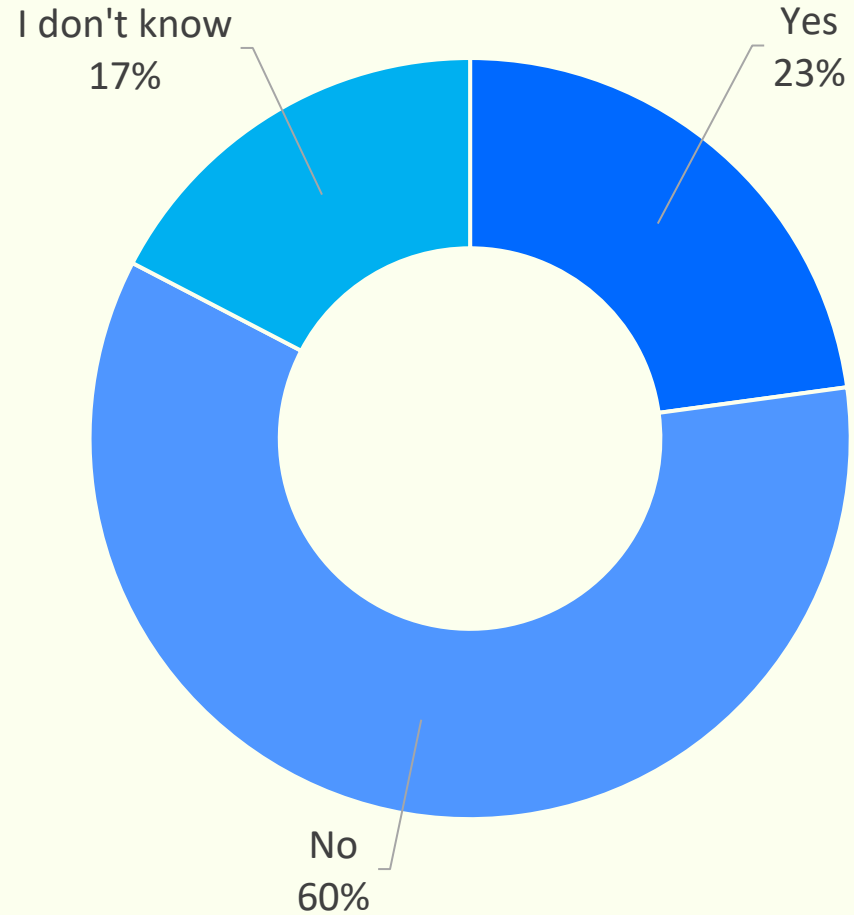
How likely are you to avoid a U.S. destination if you expect a visible federal law-enforcement, military or immigration presence?



1-in-4 American Travelers Plan to Avoid Visiting These Destinations

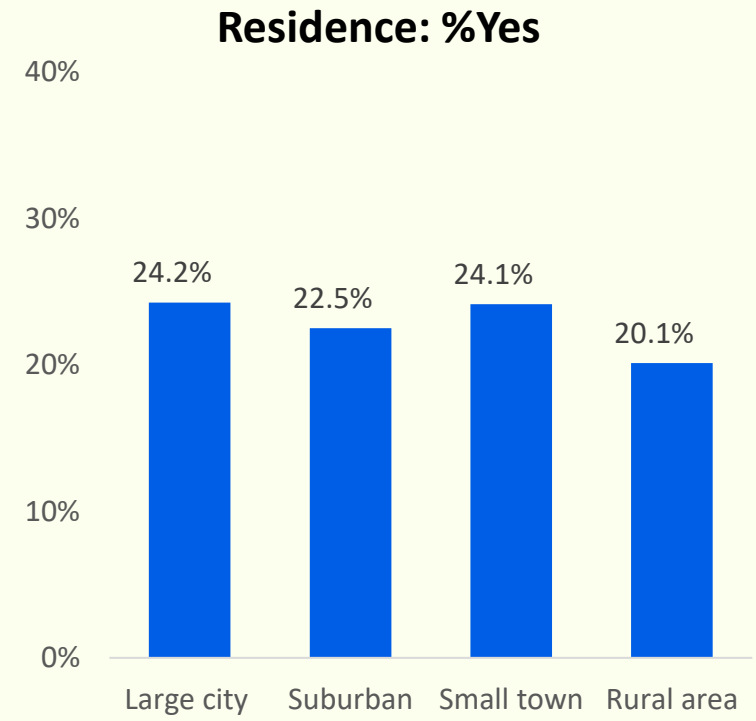
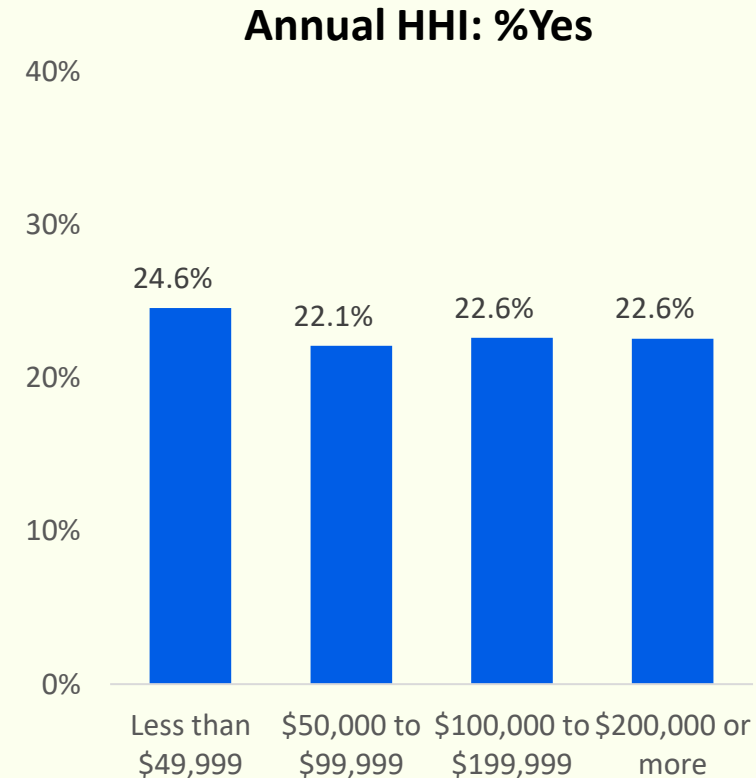
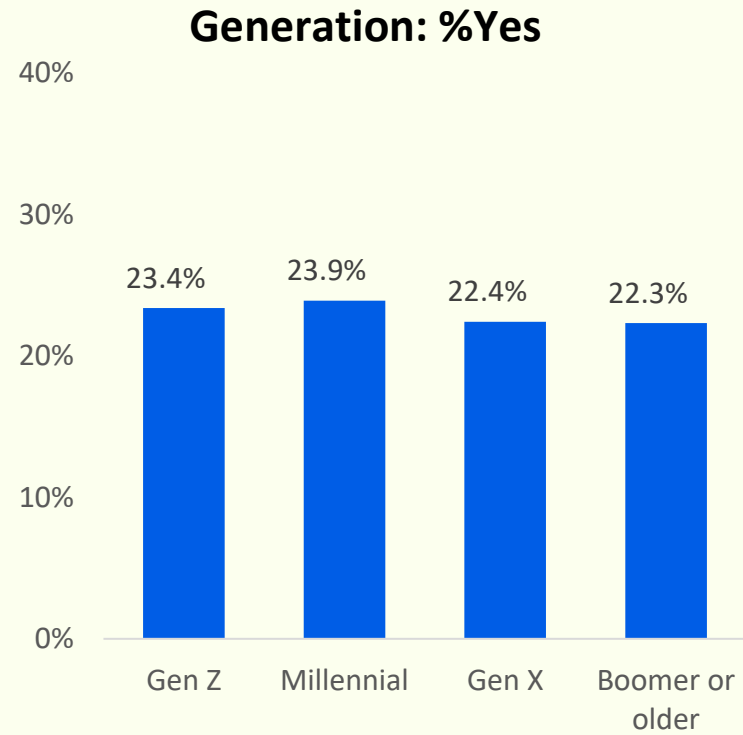
Question:

In the NEXT TWELVE (12) MONTHS, do you plan to avoid travel any U.S. cities due to federal law enforcement/Immigrations and Customs Enforcement (ICE) activity?



These Feelings Cross Most Demographic Barriers Including Age, Income & Residence

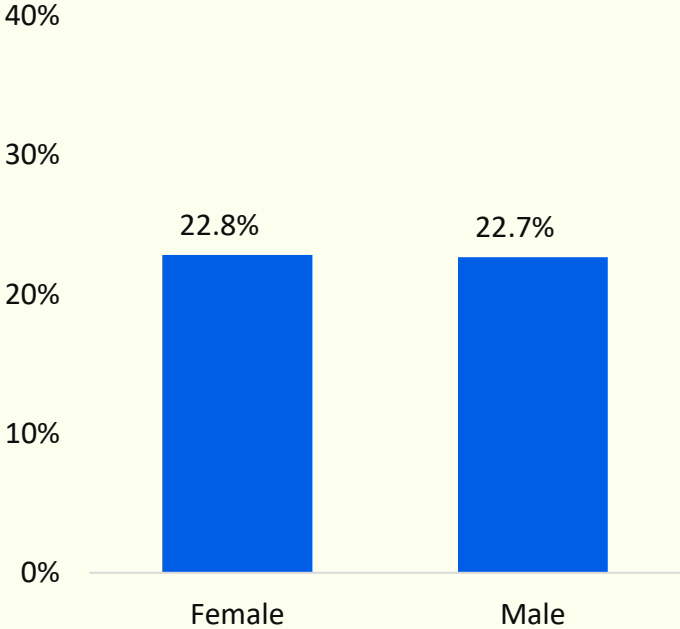
Question: In the NEXT TWELVE (12) MONTHS, do you plan to avoid travel to any U.S. cities due to federal law enforcement/Immigrations and Customs Enforcement (ICE) activity?



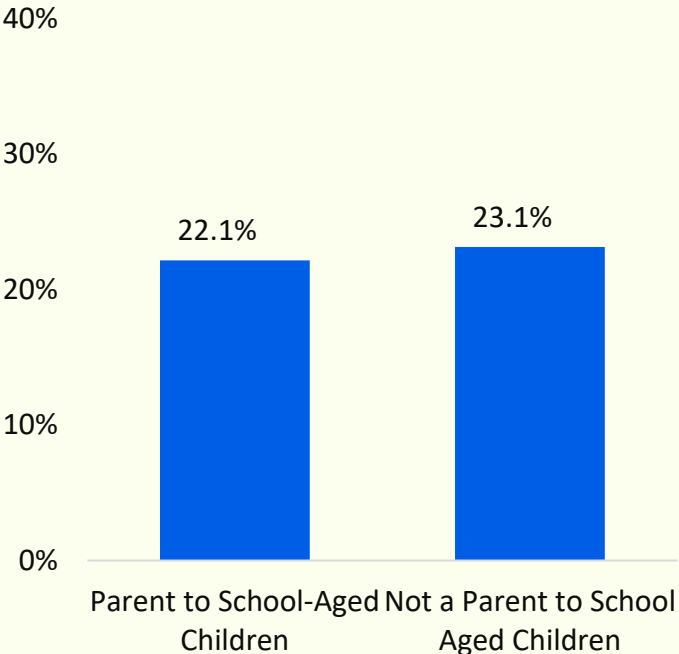
...Also, Gender, Parental Status and Ethnicity

Question: In the NEXT TWELVE (12) MONTHS, do you plan to avoid travel to any U.S. cities due to federal law enforcement/Immigrations and Customs Enforcement (ICE) activity?

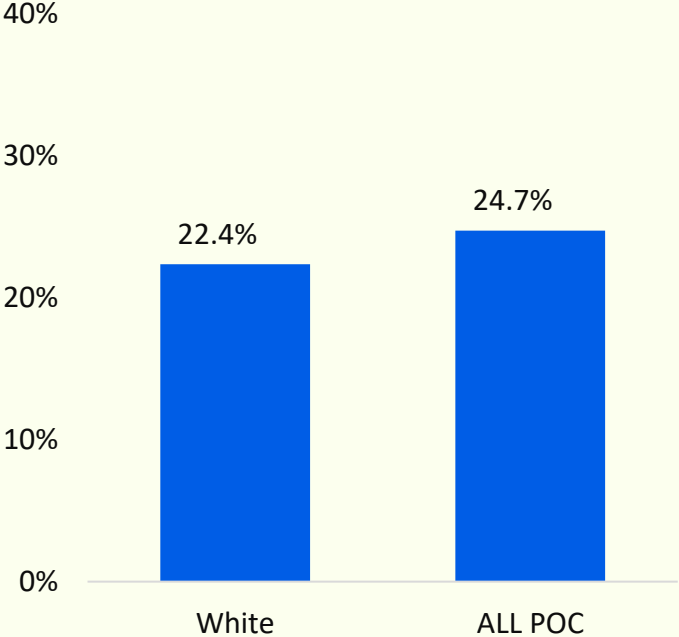
Gender: %Yes



Parental Status: %Yes

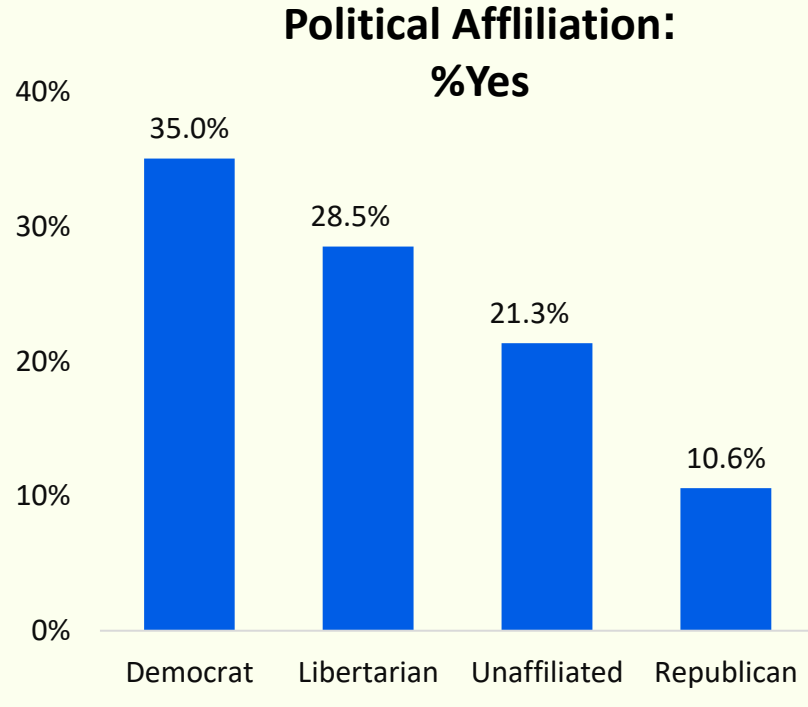
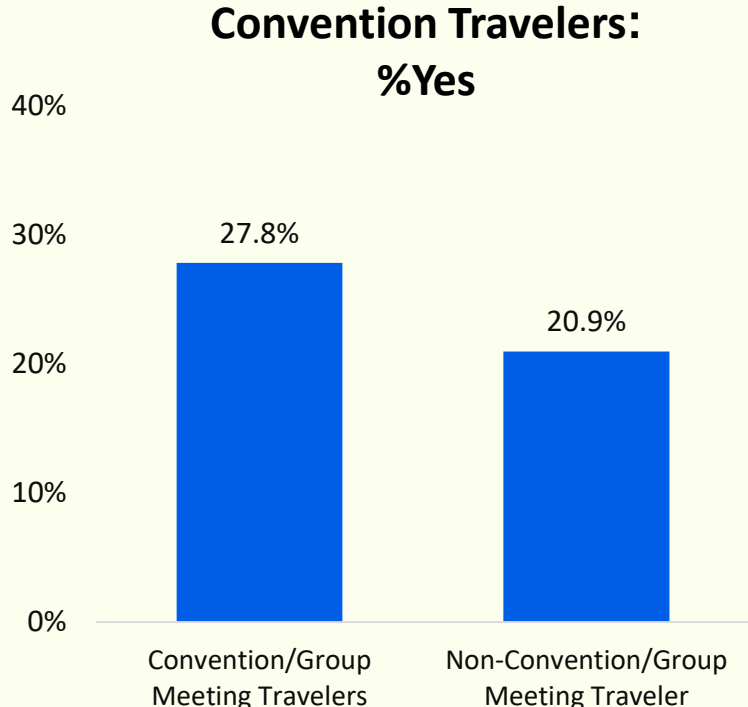
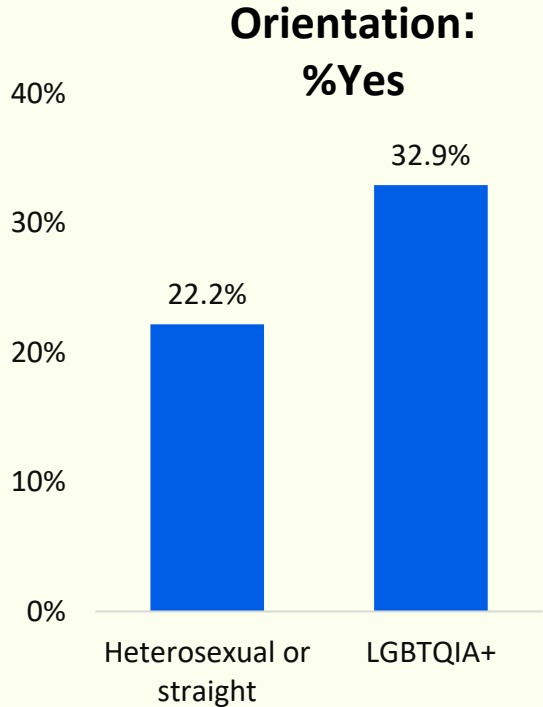


Ethnicity: %Yes



...But Differences Are Seen in Orientation, Convention Travel and Political Affiliation.

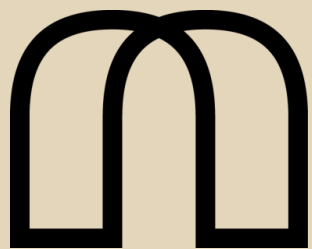
Question: In the NEXT TWELVE (12) MONTHS, do you plan to avoid travel to any U.S. cities due to federal law enforcement/Immigrations and Customs Enforcement (ICE) activity?



A wide-angle, low-angle shot of a busy city street during the "golden hour" of sunset. The sun is low on the horizon, creating a strong, warm orange glow that fills the scene and casts long shadows. Pedestrians are walking across the street, some in motion blur. Several yellow taxis are visible, also blurred by movement. The street is lined with tall, multi-story buildings with many windows. Traffic lights are visible, with one showing a red light. The overall atmosphere is one of a bustling, vibrant urban environment.

Future Partners

We Asked Travelers...



Visible federal law enforcement and immigration activity is now a **meaningful travel deterrent** for a sizable share of Americans, with many already avoiding or planning to avoid affected U.S. cities, making perceived on-the-ground atmosphere a real demand risk rather than a niche concern.



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



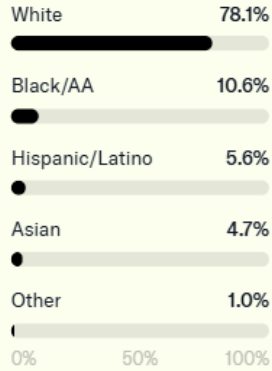
Female	51.0%
Male	48.7%
Other	0.3%

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%

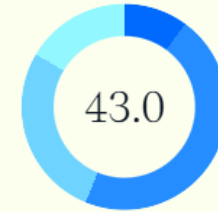
FIFA World Cup 2026 American Travelers

Gender



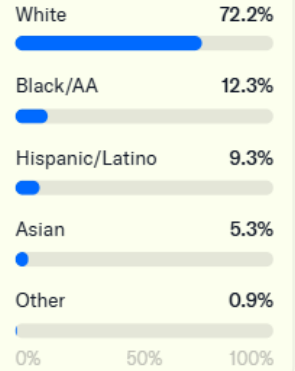
Female	37.3%
Male	62.7%
Other	0.0%

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%

Specialty Profiles

Profile Selector

Compare your target traveler with a Specialty Profile applied to reveal side-by-side differences and deeper traveler insights.

1. From the **Specialty Profile** menu, select an available profile.
2. Click a page link to open that section.
3. Select **Change Profile** to return here and choose a different profile or exit.

*Have an idea for a profile or page?
Share it with the Future Partners team.*

Recession-Proof Traveler

America 250 Traveler

FIFA World Cup 2026 Traveler

Route 66 Anniversary Traveler

LGBTQIA+ Traveler

Luxury Traveler

Recession-Proof Traveler

Top 2 Box Agreement - "Even in an economic recession, travel is a worthwhile investment."



Demographics

Origin Markets

Trip Volume & Value

Planning & Booking Details

Travel Brands

Webinar: The State of the International Traveler

February 26, 2026
12pm PT/3pm ET



Let's keep the conversation going



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Livestream Calendar