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The State of the American Traveler: Destination Decisions

Opportunity powered by *Insight*

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

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Bringing the future of travel within reach

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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.

- Data included in this presentation was collected over two waves in January 16-25, 2026, and February 17-March 3, 2026

- Confidence interval of +/- 1.55%

- Data is weighted to reflect the actual population of each region

United States Census Regions and Divisions
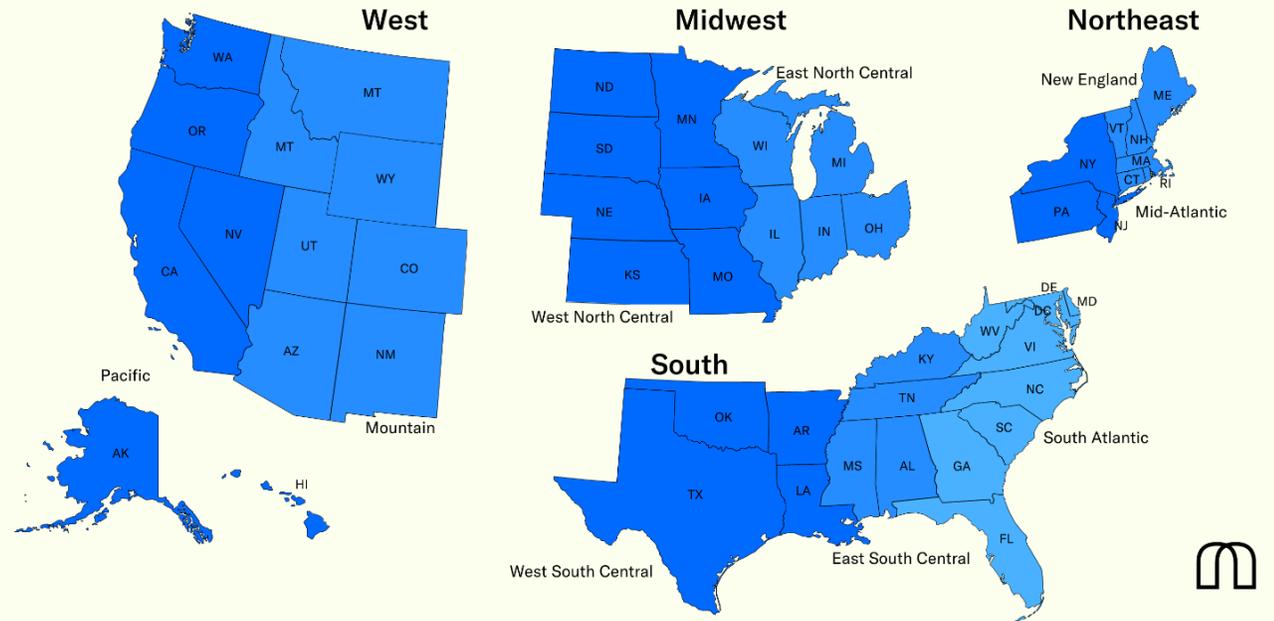
February 22

February 28

Jalisco, Mexico

Security concerns in western Mexico

Iran & Middle East

Escalating conflict in the Middle East

TSA staff shortages lead to hourslong security lines for travelers at some airports

Tune into our Monthly Webinar Series for the Latest on American Travel Sentiment & Behaviors

Livestream Calendar

Today's Agenda

- *Current Travel Sentiment Framing Destination Decisions*

- *Trip Motivators and Destination Drivers*

- *Where Destination Decisions Get Influenced: Media and Travel Tools*

- *Profile of Off-Season and Dispersal Travelers*

A Look Back:

2016

THE STATE OF THE
AMERICAN TRAVELER

Destination Analysts
Destinations Edition
January 2016 | Volume 19

Destinations Poised for Success in 2016

American destinations can expect high levels of excitement around leisure travel segments this year. In our latest Destinations Edition of this study, 4.2 percent of travelers said that they will increase the number of trips taken this year, up from 31.1 percent one year earlier. 34.4 percent also now plan to devote more money to travel. Demand for leisure travel strong across regions, destination types and income brackets, but is most pronounced amongst younger, urban residents.
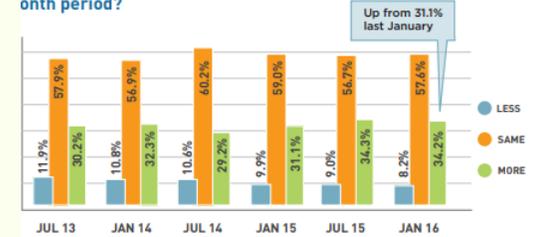
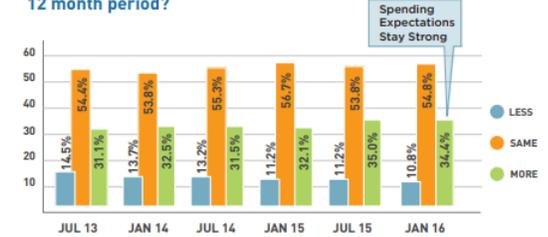Sponsored By **miles** marketing destinations

SNAP SHOT
Americans planning to **increase** leisure travel **spending** in the next 12 months — **34%**

Q: In the next 12 months, do you expect to travel more less for leisure than you did in the most recent 12 month period?

Up from 31.1% last January

LESS: 11.9%, 10.8%, 10.6%, 9.9%, 9.0%, 8.2%
SAME: 57.9%, 56.9%, 60.2%, 59.0%, 56.7%, 57.6%
MORE: 30.2%, 32.3%, 29.2%, 31.1%, 34.3%, 34.2%

JUL 13 | JAN 14 | JUL 14 | JAN 15 | JUL 15 | JAN 16

Q: 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?

Spending Expectations Stay Strong

LESS: 14.5%, 13.7%, 13.2%, 11.2%, 11.2%, 10.8%
SAME: 54.4%, 53.8%, 55.3%, 56.7%, 53.8%, 54.8%
MORE: 31.1%, 32.5%, 31.5%, 32.1%, 35.0%, 34.4%

JUL 13 | JAN 14 | JUL 14 | JAN 15 | JUL 15 | JAN 16

Who Will Travel More in 2016? Leisure travel expectations from varied perspectives
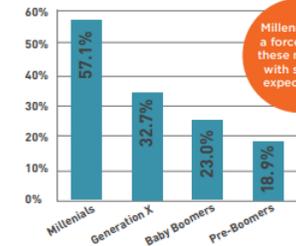
Region of Residence
(% region planning to travel more)

West 35.4% | Southwest 34.3% | Rocky Mountains 28.7% | Midwest 31.1% | Southeast 37.8% | Northeast 32.4%
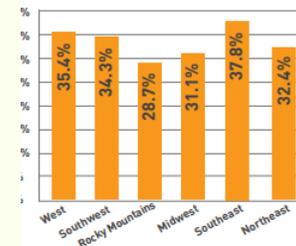
Annual Household Income
(% income planning to travel more)

Less than $80K: 34.9% | $80K to $200K: 32.7% | Over $200K: 35.8%

Generations
(% age planning to travel more)

Millennials 57.1% | Generation X 32.7% | Baby Boomers 23.0% | Pre-Boomers 18.9%

Millennials are a force behind these numbers, with sky high expectations.

Peer-to-Peer Lodging Guests
(% planning to travel more, comparison)

Peer-to-peer lodging guests* 65.2% | Other leisure travelers 29.6%

Users of these high-tech services have expectations far outpacing other travelers.
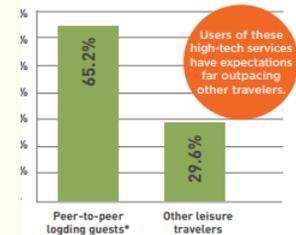
Multi-Generational Travelers
(% planning to travel more, comparison)

Multigenerational travelers** 44.7% | Other leisure travelers 31.1%
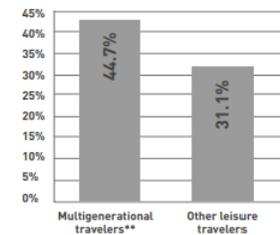
Place of Residence
(% planning to travel more, comparison)
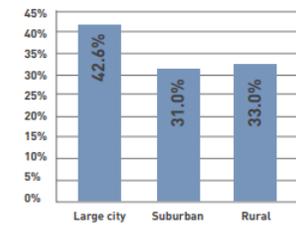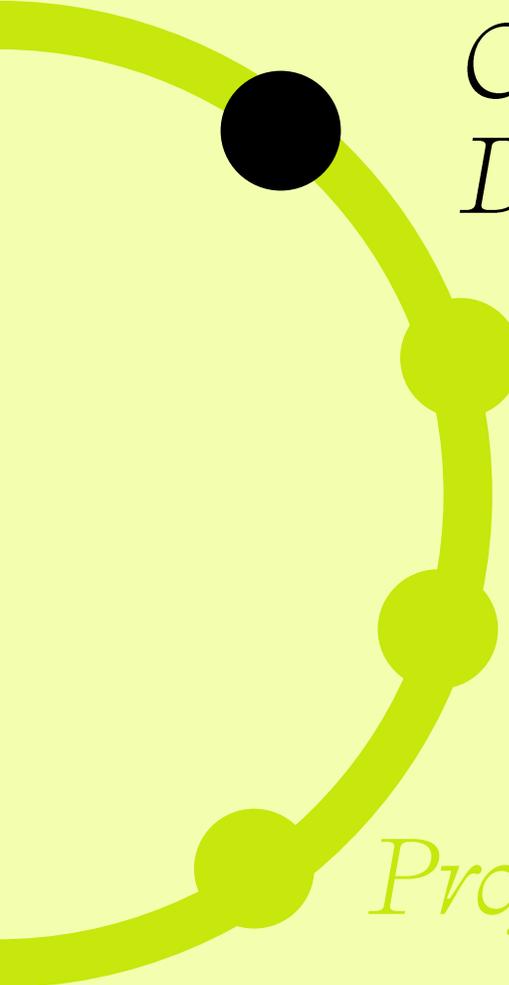
Large city 42.6% | Suburban 31.0% | Rural 33.0%

*avelers using a website such as Airbnb, HomeAway or BO to book leisure accommodations in past 12 months

**Travelers taking a trip that included at least three generations of travelers in past 12 months

Today's Agenda

Current Travel Sentiment Framing Destination Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced: Media and Travel Tools

Profile of Off-Season and Dispersal Travelers

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In the post-pandemic years, travel has maintained its status as a prioritized experience, with the average number of trips planned steadily increasing each year since 2022. Strong travel demand offers destinations great opportunity.

Since the Pandemic, Leisure Trip Volume Has Continued to Increase Each Year

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

Expected Trip Frequency – Next 12 Months

■ Mean Expected Trips — % 5 or More Trips

2022
Average: 2.9 trips
5 or more trips: 19.1%

2023
Average: 3.4 trips
5 or more trips: 24.7%

2024
Average: 3.6 trips
5 or more trips: 26.4%

2025 YTD
Average: 3.8 trips
5 or more trips: 28.5%

2026 YTD
Average: 4.0 trips
5 or more trips: 31.7%

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(Base: All respondents, 4,000+ completed surveys each wave in 2022-2026)
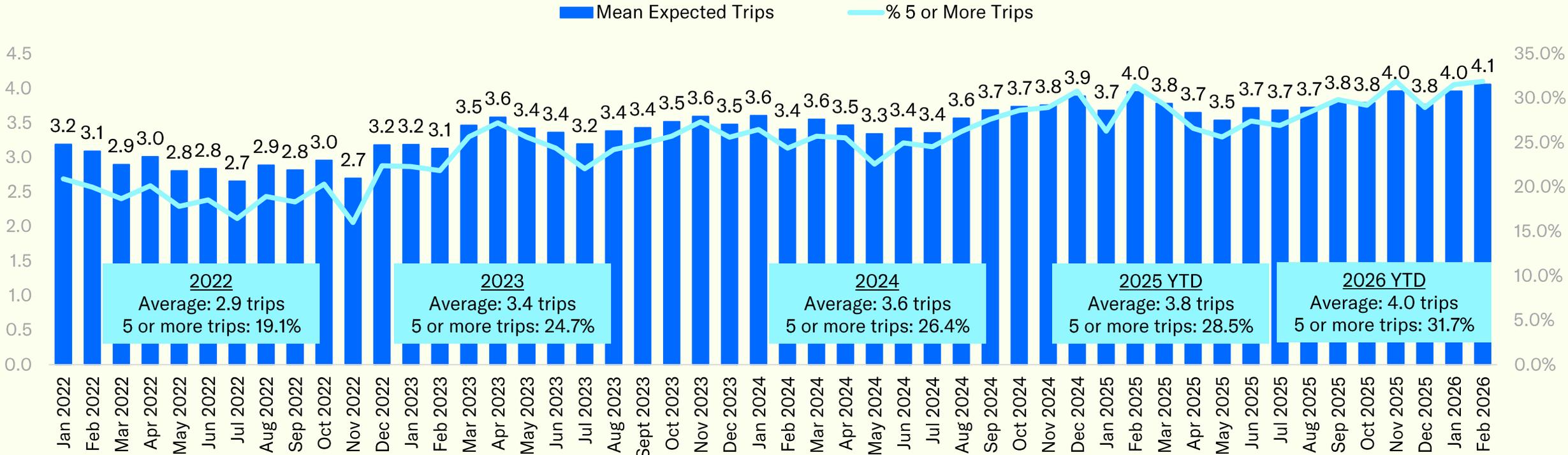
Annual Travel Budgets Have Also Risen Consistently

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): _____

Average Maximum Annual Travel Budget

38-Month Average = $4,769

(Base: All respondents, 4,000+ completed surveys each wave in 2022-2026)
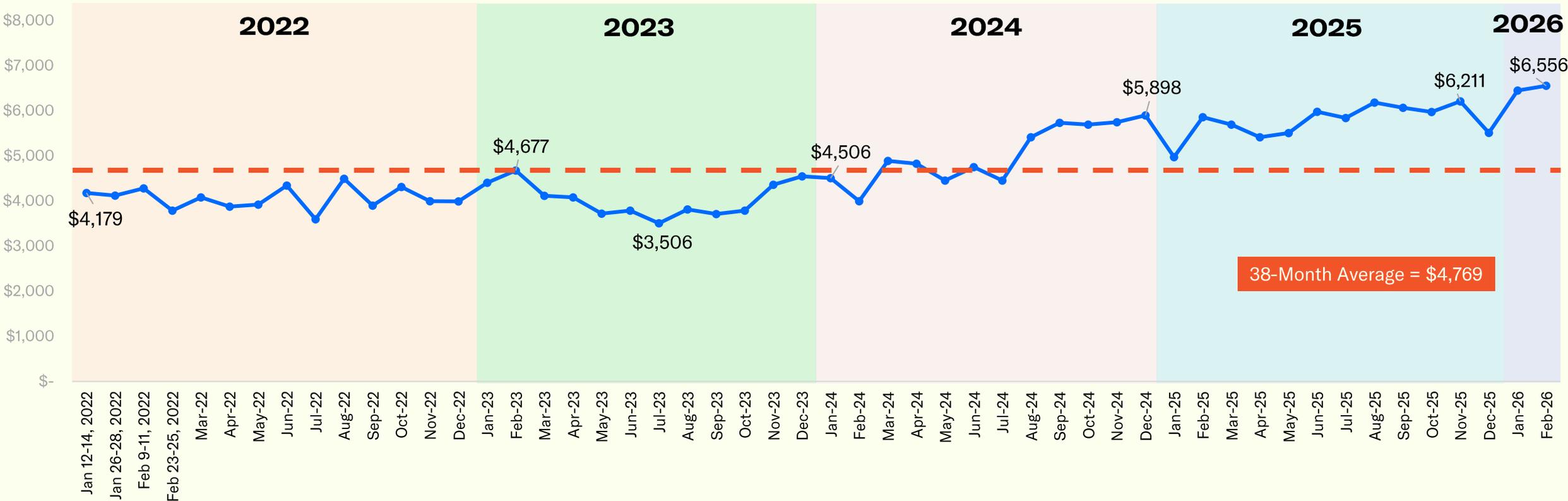
Furthermore, Excitement for Travel Remains High

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

Mean Score (0 - 10-point scale)
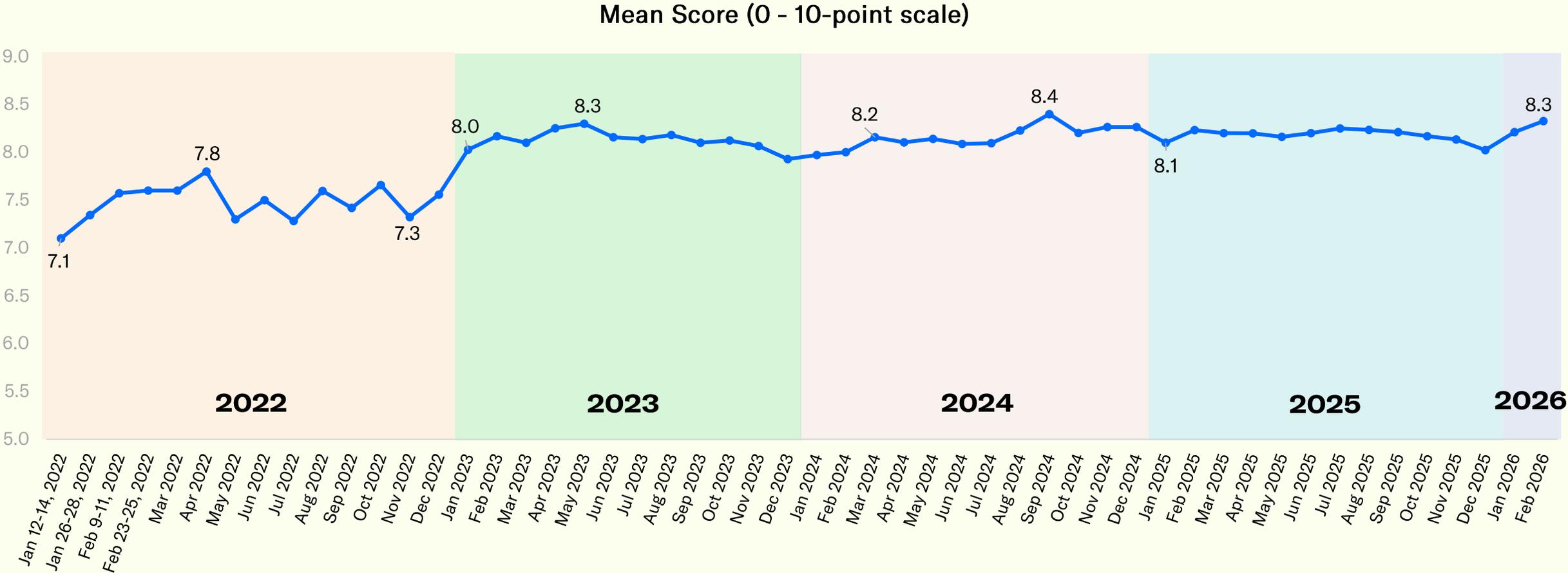
Six in Ten American Travelers are Prioritizing Leisure Travel Spending in the Short-term

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. (Select one)

Leisure travel will be a(n) _____.

60.0%

Category	Percentage
Extremely high priority	12.3%
High priority	20.6%
Somewhat high priority	27.1%
Neutral - neither high nor low priority	20.4%
Somewhat low priority	9.1%
Low priority	6.2%
Extremely low priority	4.3%

0%   10%   20%   30%   40%

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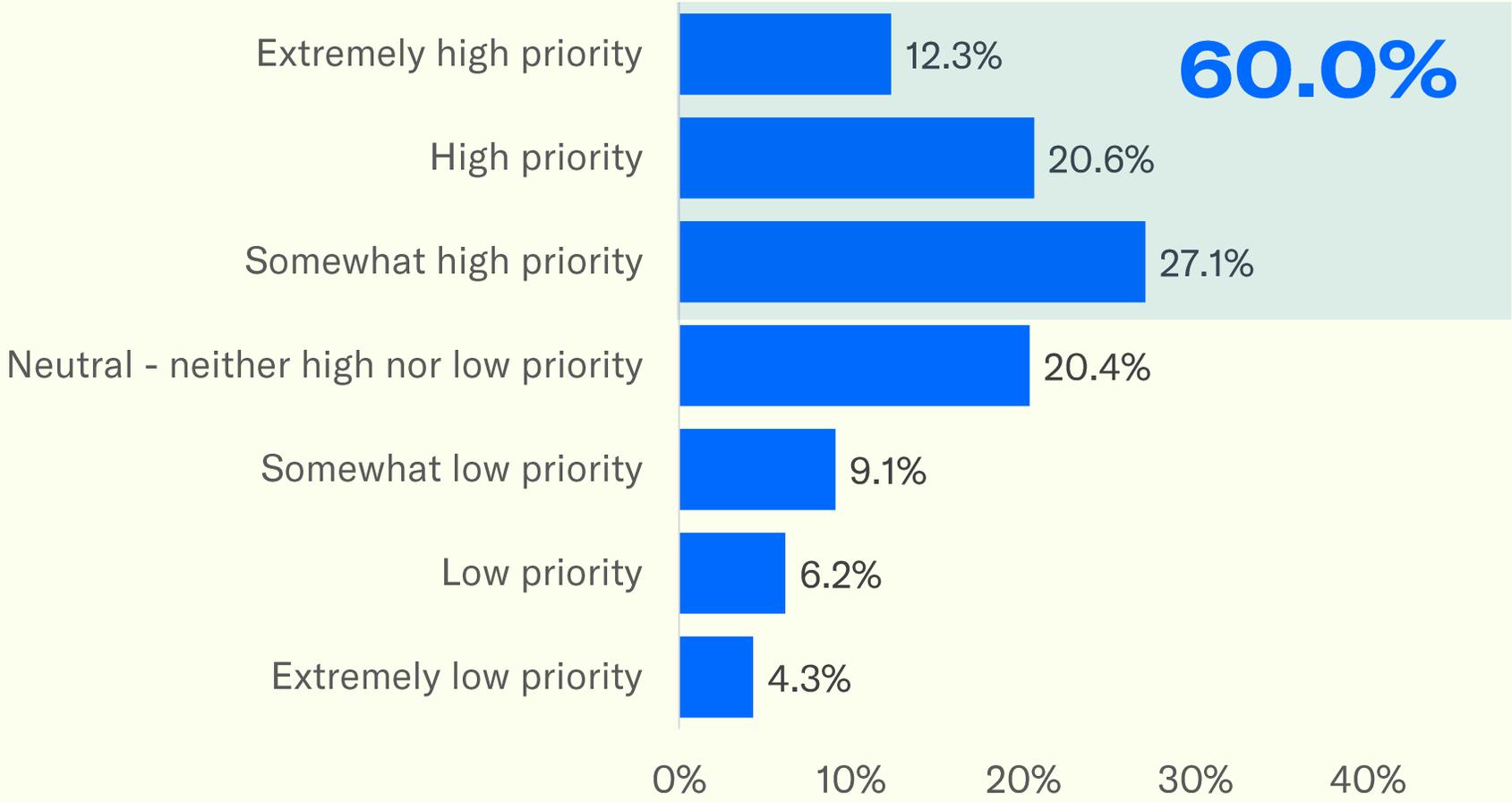
Travel as a Budget Priority has Rebounded after a Downward Turn Late Last Year

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. Leisure travel will be a(n) _____.

% Leisure Travel as a High Budget Priority

2022 **2023** **2024** **2025** **2026**

Data labels: 58.2%, 61.8%, 53.2%, 57.6%, 50.8%, 54.4%, 59.2%, 62.0%, 59.5%, 54.3%, 60.5%, 57.1%, 56.4%, 61.5%

X-axis labels: Jan 12-14, 2022, Jan 26-28, 2022, Feb 9-11, 2022, Feb 23-25, 2022, Mar-22, Apr-22, May-22, Jun-22, Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-22, Jan-23, Feb-23, Mar-23, Apr-23, May-23, Jun-23, Jul-23, Aug-23, Sep-23, Oct-23, Nov-23, Dec-23, Jan-24, Feb-24, Mar-24, Apr-24, May-24, Jun-24, Jul-24, Aug-24, Sep-24, Oct-24, Nov-24, Dec-24, Jan-25, Feb-25, Mar-25, Apr-25, May-25, Jun-25, Jul-25, Aug-25, Sep-25, Oct-25, Nov-25, Dec-25, Jan-26, Feb-26

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(Base: All respondents, 4,000+ completed surveys each wave in 2022-2026)

Financial anxiety and the unevenness in who this is felt by amongst traveling consumers create a fiercely competitive environment for capturing destination share. As travelers are more deliberate about spending, destination choice matters even more.

Travelers' Optimism about their Personal Financial Outlook is Tracking Below the 4-Year Average

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?

% Better off or Much better off

44.4%

51.8%

51.9%

51.5%

48.6%

Past four-year average = 46.6%

39.2%

42.2%

45.5%

January 2022
February 2022
March 2022
April 2022
May 2022
June 2022
July 2022
August 2022
Sept 2022
October 2022
November 2022
December 2022
January 2023
February 2023
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May 2025
June 2025
July 2025
Aug 2025
Sept 2025
Oct 2025
Nov 2025
Dec 2025
Jan 2026
Feb 2026

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Although Recession Fears Have Declined After a Spike Last Spring, They Are Still Elevated Relative to 2024

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

% Agree or Strongly Agree

2022   **2023**   **2024**   **2025**   **2026**

63.6%
58.8%
53.6%
52.6%
49.4%
40.9%
39.6%
34.5%
35.6%
56.9%
47.9%
48.5%
40.4%

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(Base: All respondents, 4,000+ completed surveys each wave in 2022-2026)
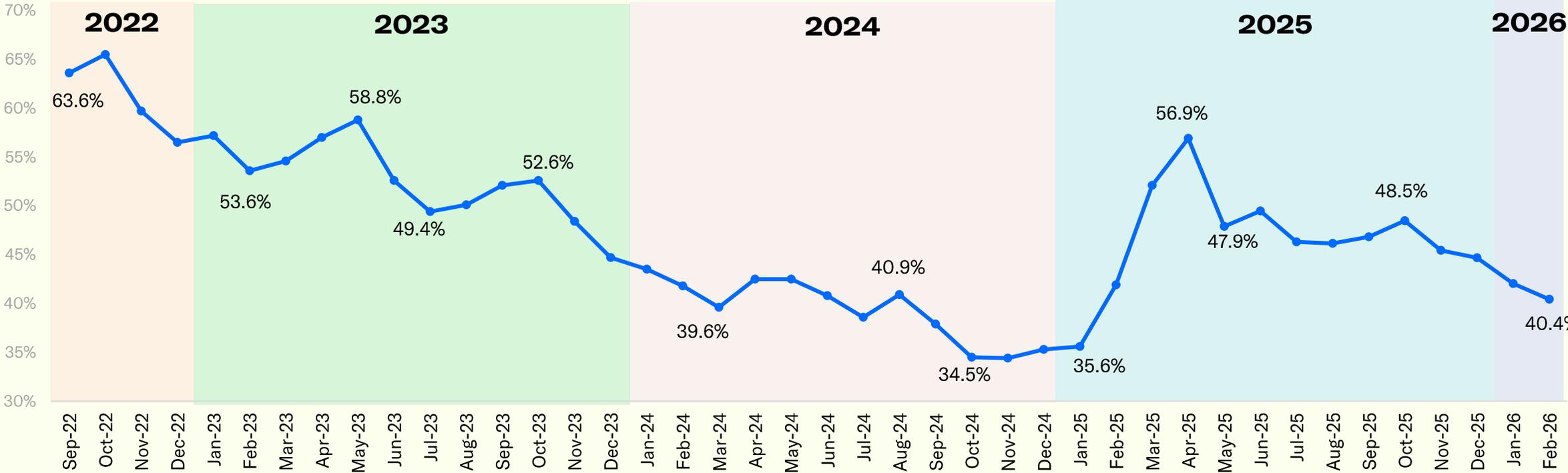
Spending Caution Fueled by Recession Fears Has Peaked

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

% Agree or Strongly agree

- April 2025: 55.4%
- May 2025: 50.7%
- June 2025: 48.5%
- July 2025: 47.2%
- August 2025: 46.4%
- September 2025: 46.2%
- October 2025: 50.1%
- November 2025: 57.9%
- December 2025: 54.3%
- January 2026: 59.0%
- February 2026: 60.7%

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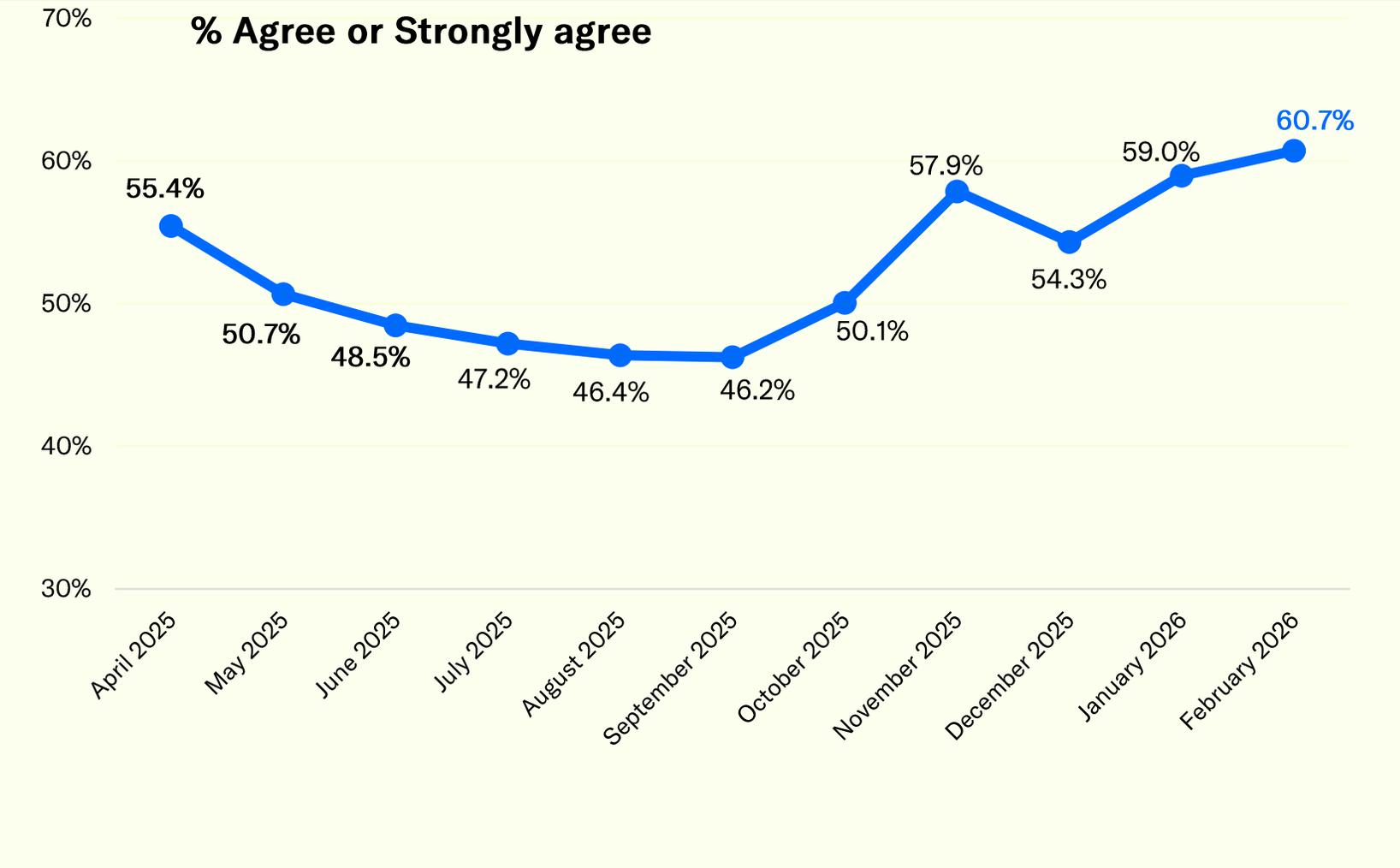
Over One-Third of Travelers Say Now is a Good Time to Spend on Leisure Travel

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? (Select one)

Yes - It is a very good time — 7.5%

Yes - It is a good time — 27.8%

It is neither a good time nor bad time — 40.1%

No - It is a bad time — 18.1%

No - It is a very bad time — 6.6%

35.3%

24.7%

0%   20%   40%   60%

(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)
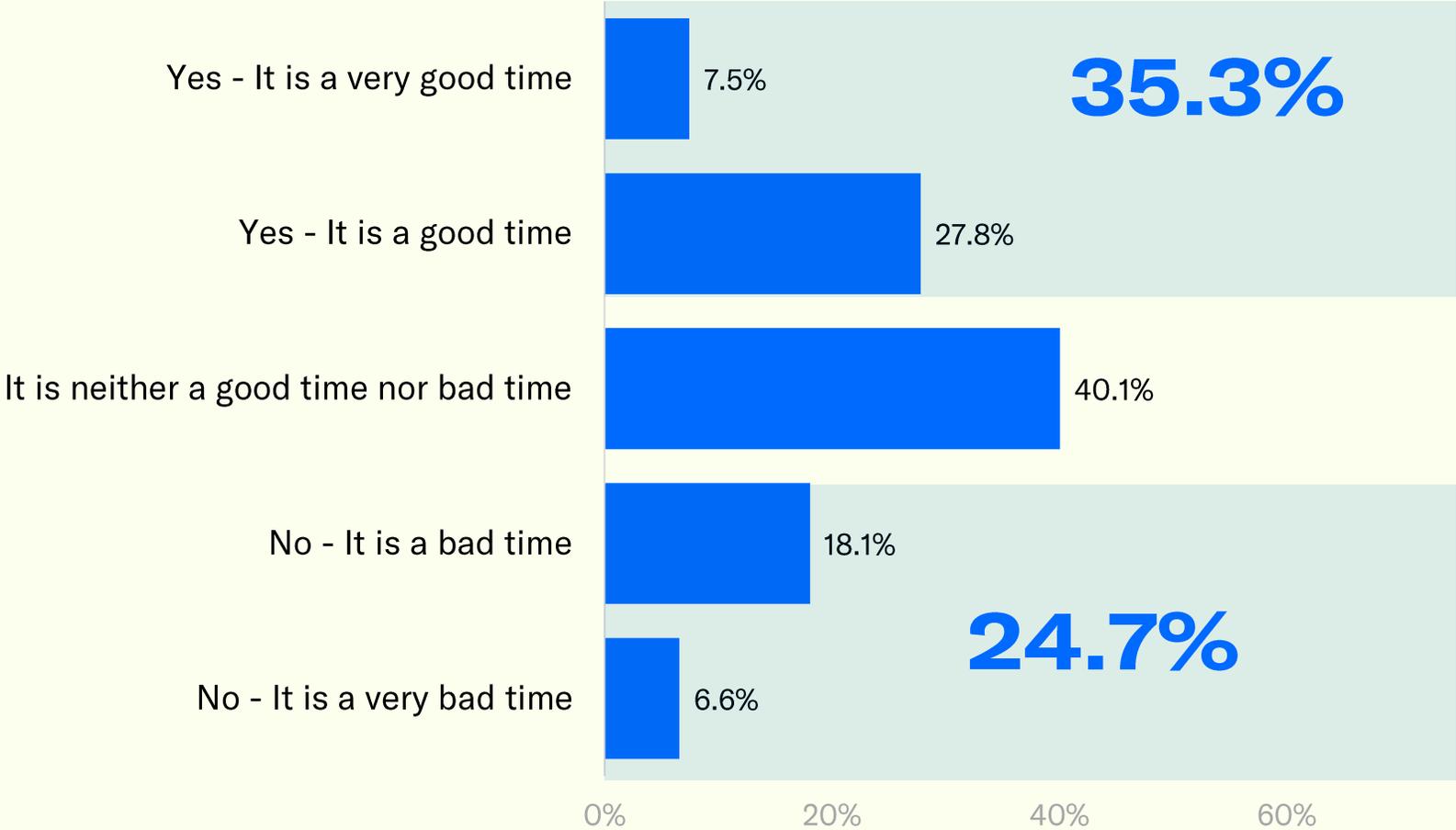
This Sentiment Has Stabilized Over the Last Few Months

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? (Select one)

% Good time or Very good time

Data labels visible: 37.6%, 41.7%, 31.8%, 21.9%, 31.5%, 25.5%, 34.4%, 36.9%, 30.1%, 37.1%, 35.7%

Year bands: 2022, 2023, 2024, 2025, 2026

X-axis labels: Jan 12-14, 2022; Jan 26-28, 2022; Feb 9-11, 2022; Feb 23-25, 2022; Mar-22; Apr-22; May-22; Jun-22; Jul-22; Aug-22; Sep-22; Oct-22; Nov-22; Dec-22; Jan-23; Feb-23; Mar-23; Apr-23; May-23; Jun-23; Jul-23; Aug-23; Sep-23; Oct-23; Nov-23; Dec-23; Jan-24; Feb-24; Mar-24; Apr-24; May-24; Jun-24; Jul-24; Aug-24; Sep-24; Oct-24; Nov-24; Dec-24; Jan-25; Feb-25; Mar-25; Apr-25; May-25; Jun-25; Jul-25; Aug-25; Sep-25; Oct-25; Nov-25; Dec-25; Jan-26; Feb-26

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(Base: All respondents, 4,000+ completed surveys each wave in 2022-2026)

Over 88% Already Have Leisure Trips Planned in 2026

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

Month	Percentage
March 2026	26.5%
April 2026	28.1%
May 2026	30.0%
June 2026	31.3%
July 2026	29.9%
August 2026	25.1%
September 2026	23.3%
Sometime later in 2026	31.3%
NONE OF THESE - I HAVE NO TRIPS CURRENTLY PLANNED	11.9%

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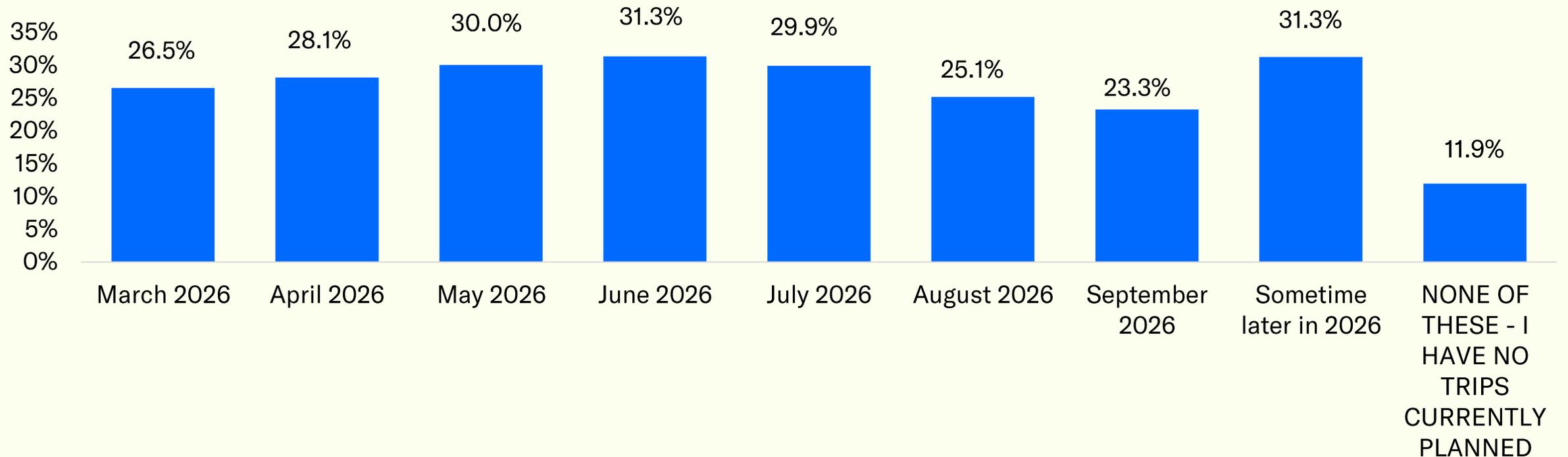
Spending Momentum is Modestly Positive for the Upcoming Summer Season

Question:
Compared to last summer, your total leisure travel spending this summer will be...

Category	Value
Significantly higher	7.8%
Somewhat higher	26.1%
About the same	54.0%
Somewhat lower	9.1%
Significantly lower	3.0%

33.9%

12.1%

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys
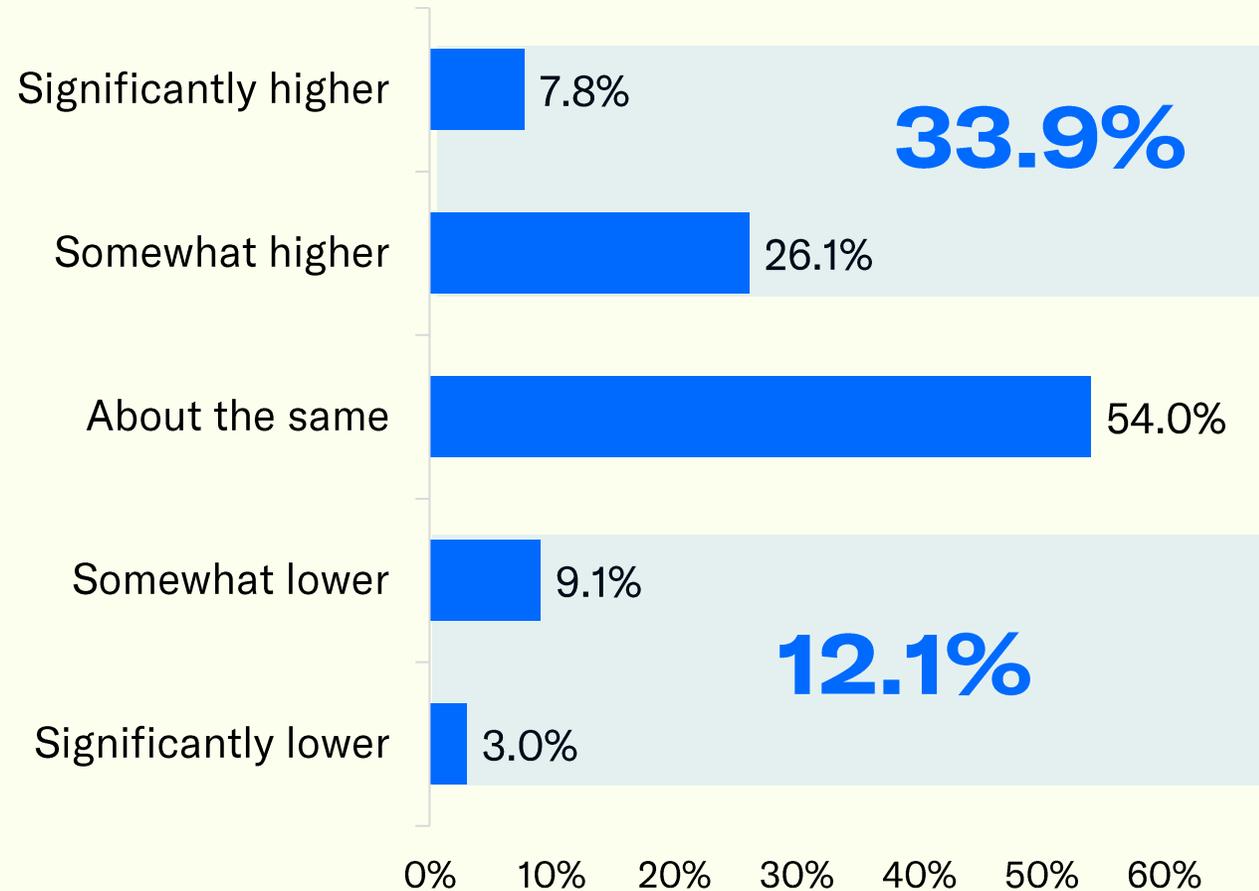
Summer Travel Budgets Cluster in the Mid Range

Budget Range	Percentage
More than $10,000	7.0%
$5,000–$9,999	15.1%
$2,500–$4,999	23.9%
$1,500–$2,499	19.4%
$1,000–$1,499	17.5%
$500–$999	10.5%
Under $500	6.6%

$3,427
Average total

Future Partners The State of the American Traveler, March 2026

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys
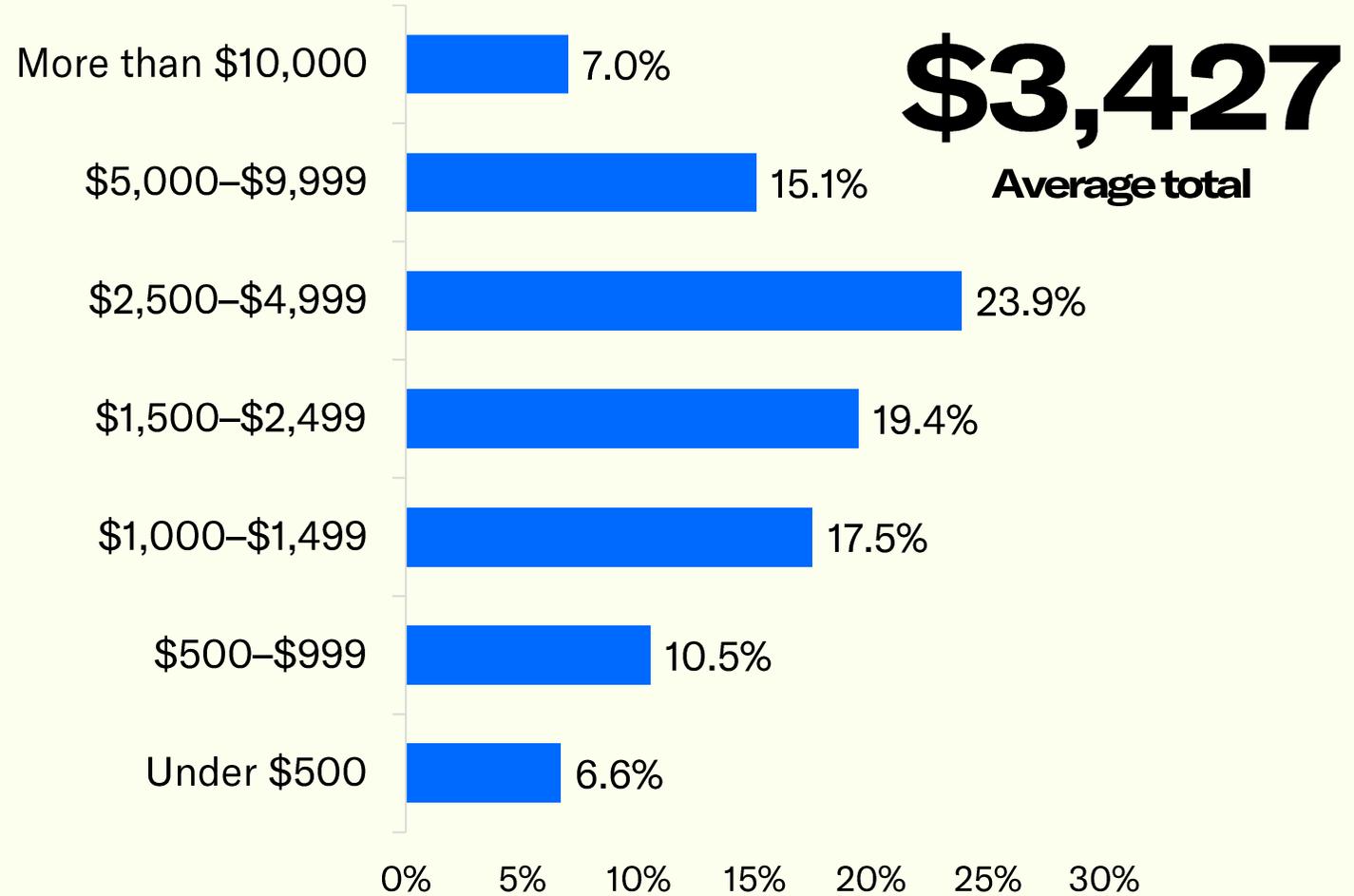
Financial Constraints Continue to be the Biggest Barriers to Travel

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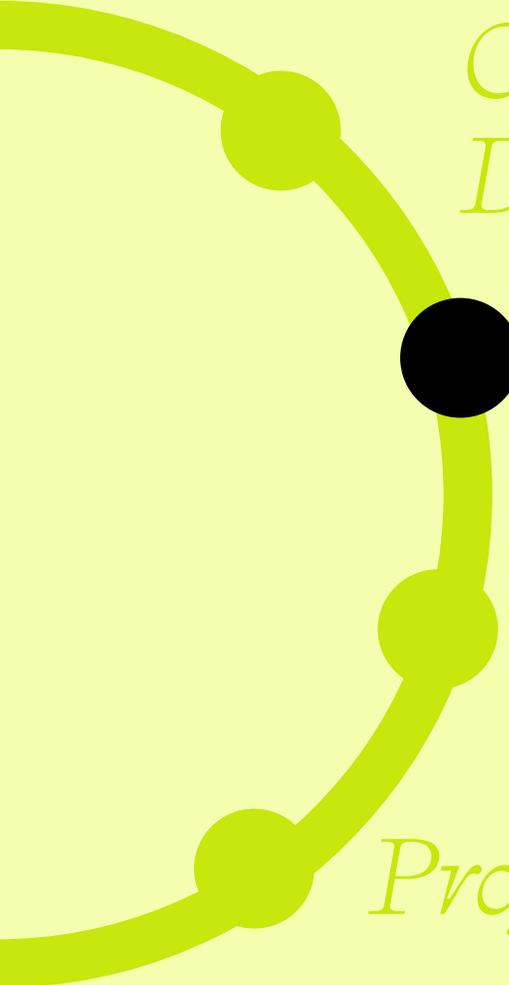In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

Barrier	Percentage
Travel is too expensive right now	33.6%
Personal financial reasons	32.0%
Airfare was too expensive	27.3%
I'm too busy at work	24.6%
Not enough PTO/vacation time	18.3%
Weather	13.4%
Crowds	12.7%
Gasoline was too expensive	12.3%
Health/Illness	10.1%
Safety concerns (non-COVID)	10.5%
The possibility of flight cancellations	9.5%
COVID safety concerns	5.7%
Lack of availability	3.8%
Sold out/No reservations available	3.6%
None of these	20.3%

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Travelers' passions tell destinations which experiences to lead with while travelers' motivations for their trips reveal what destinations need to deliver to win visitors. Destinations don't just compete on "where" — they compete on which version of the traveler's identity they enable. Note that there may be no greater predictor of travel passions and destination aspiration then age or life stage.
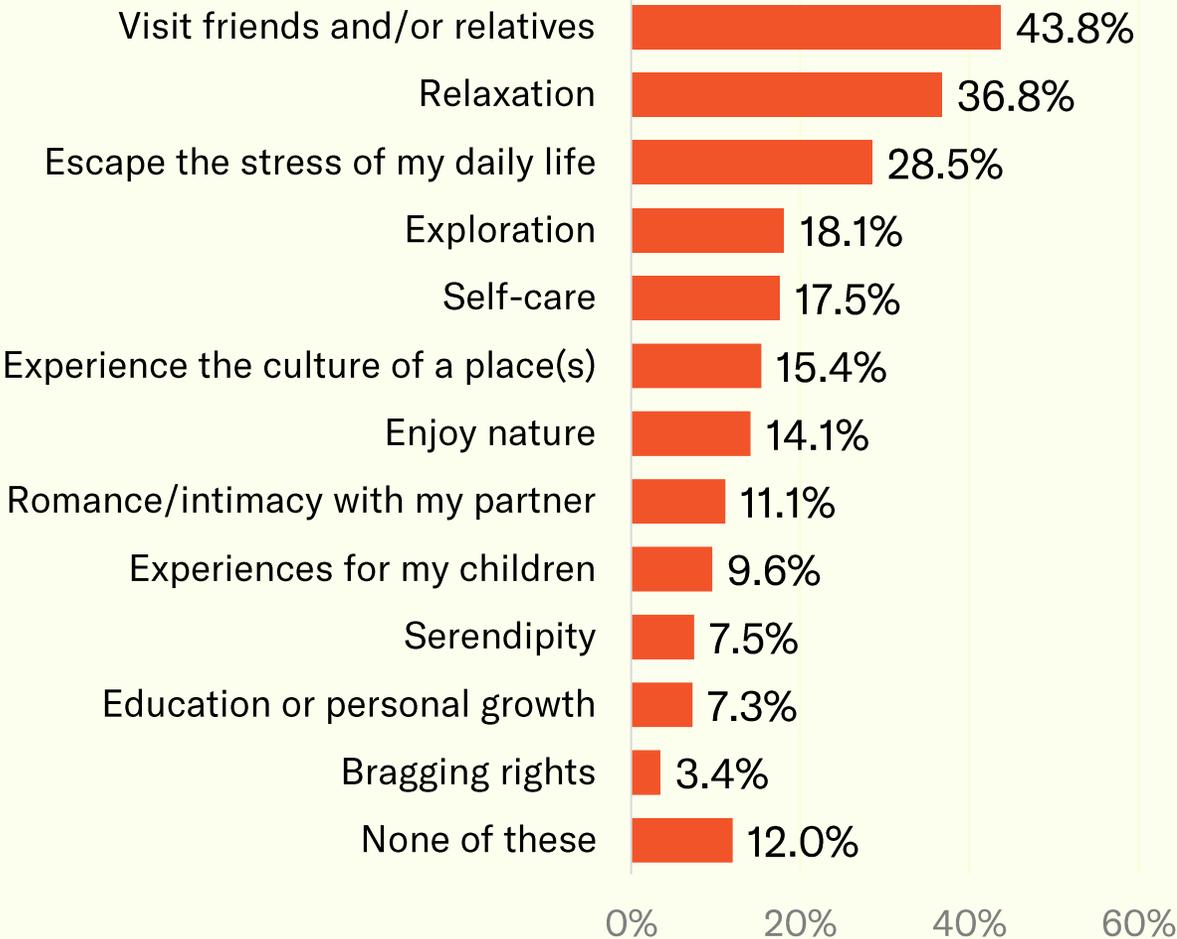
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We Asked Travelers...

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Travelers' Most Recent Overnight Trips were Most Commonly Motivated by Visiting Loved Ones, Relaxing and Escaping Day-to-day Stress

Question:
Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?

Motivation	Percentage
Visit friends and/or relatives	43.8%
Relaxation	36.8%
Escape the stress of my daily life	28.5%
Exploration	18.1%
Self-care	17.5%
Experience the culture of a place(s)	15.4%
Enjoy nature	14.1%
Romance/intimacy with my partner	11.1%
Experiences for my children	9.6%
Serendipity	7.5%
Education or personal growth	7.3%
Bragging rights	3.4%
None of these	12.0%

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Travel is Widely Used by People to Support their Overall Well-Being

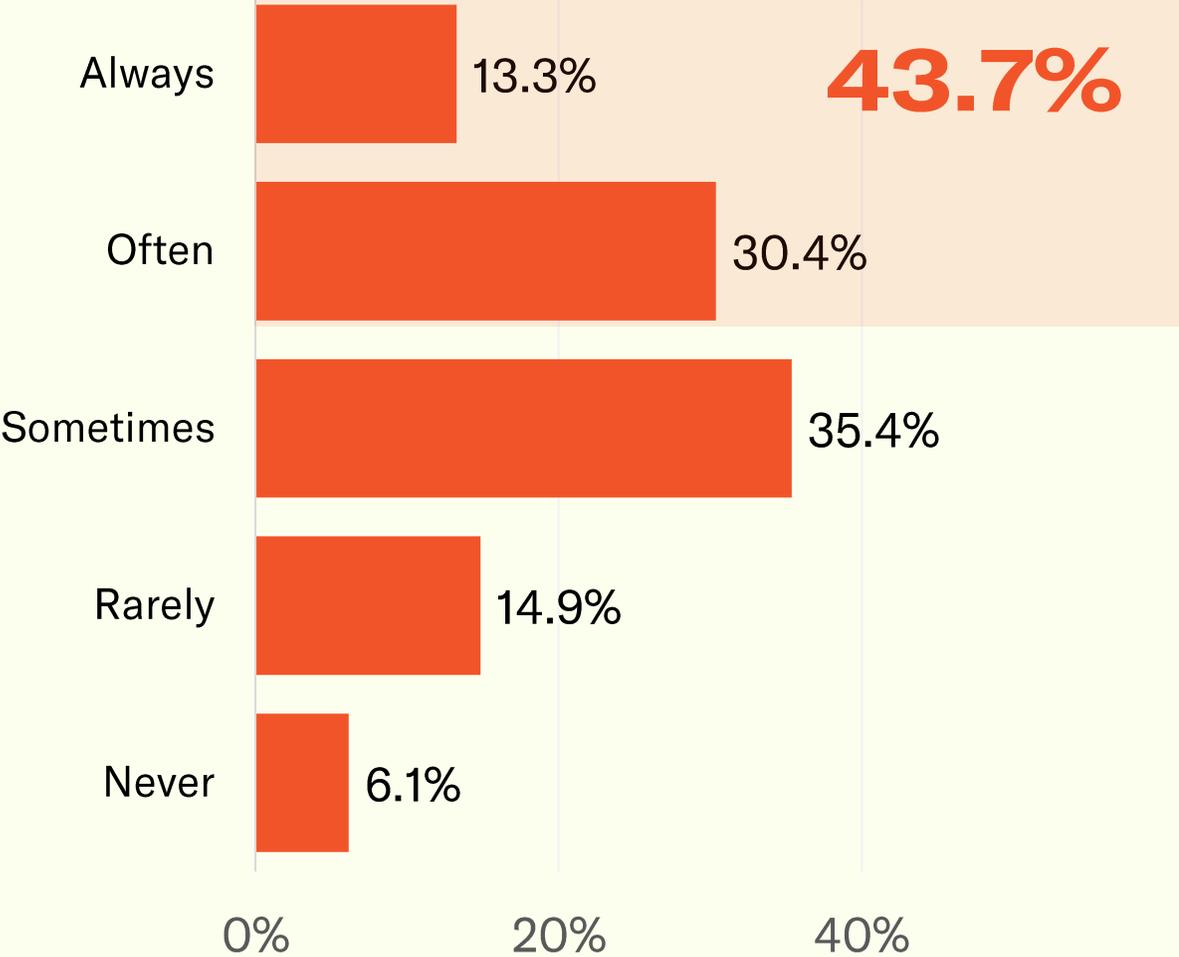**Question:**
Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)

Category	Value
Extremely important	30.0%
Very important	38.2%
Moderately important	23.1%
Slightly important	6.3%
Not at all important	2.5%

68.2%

(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)
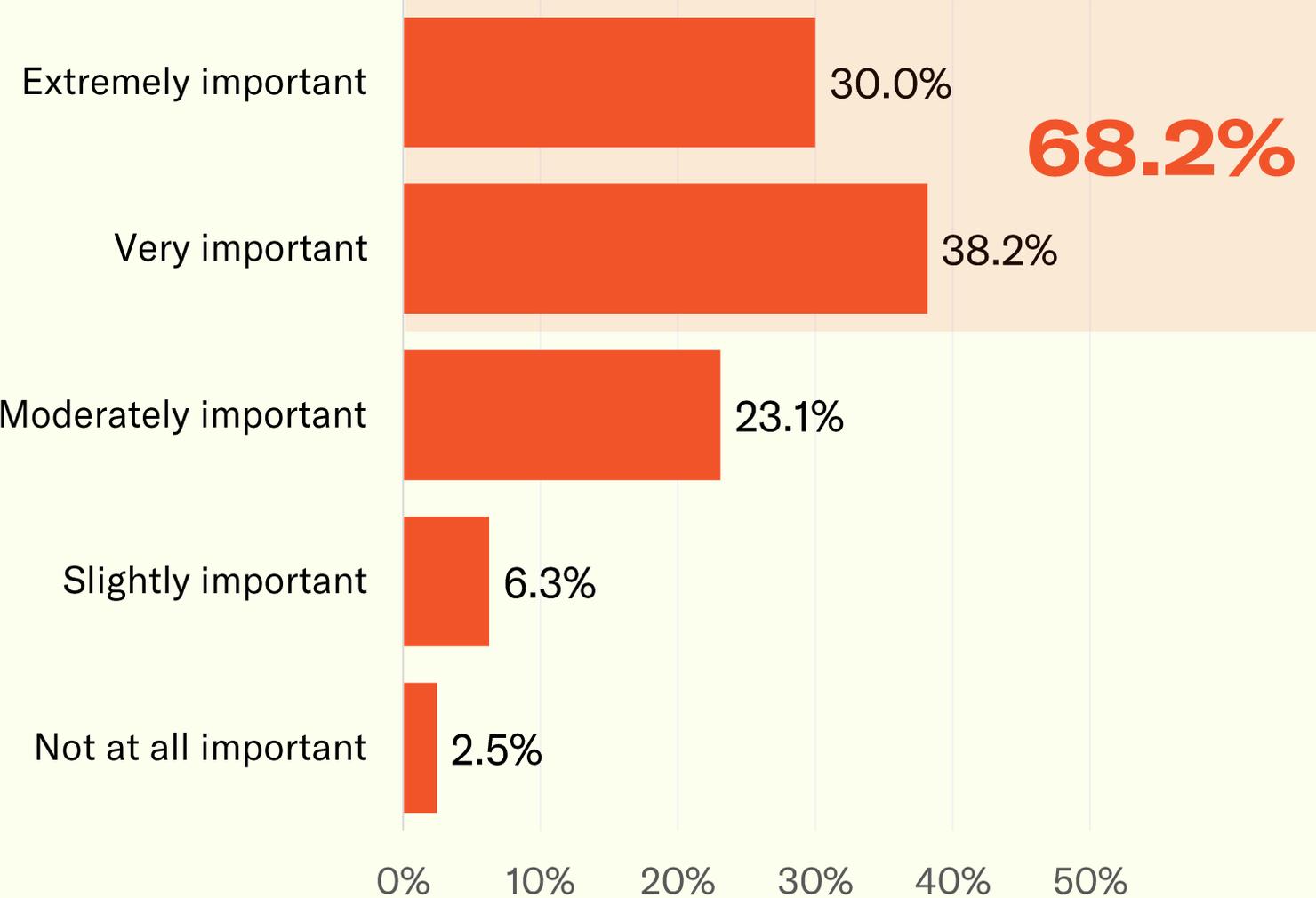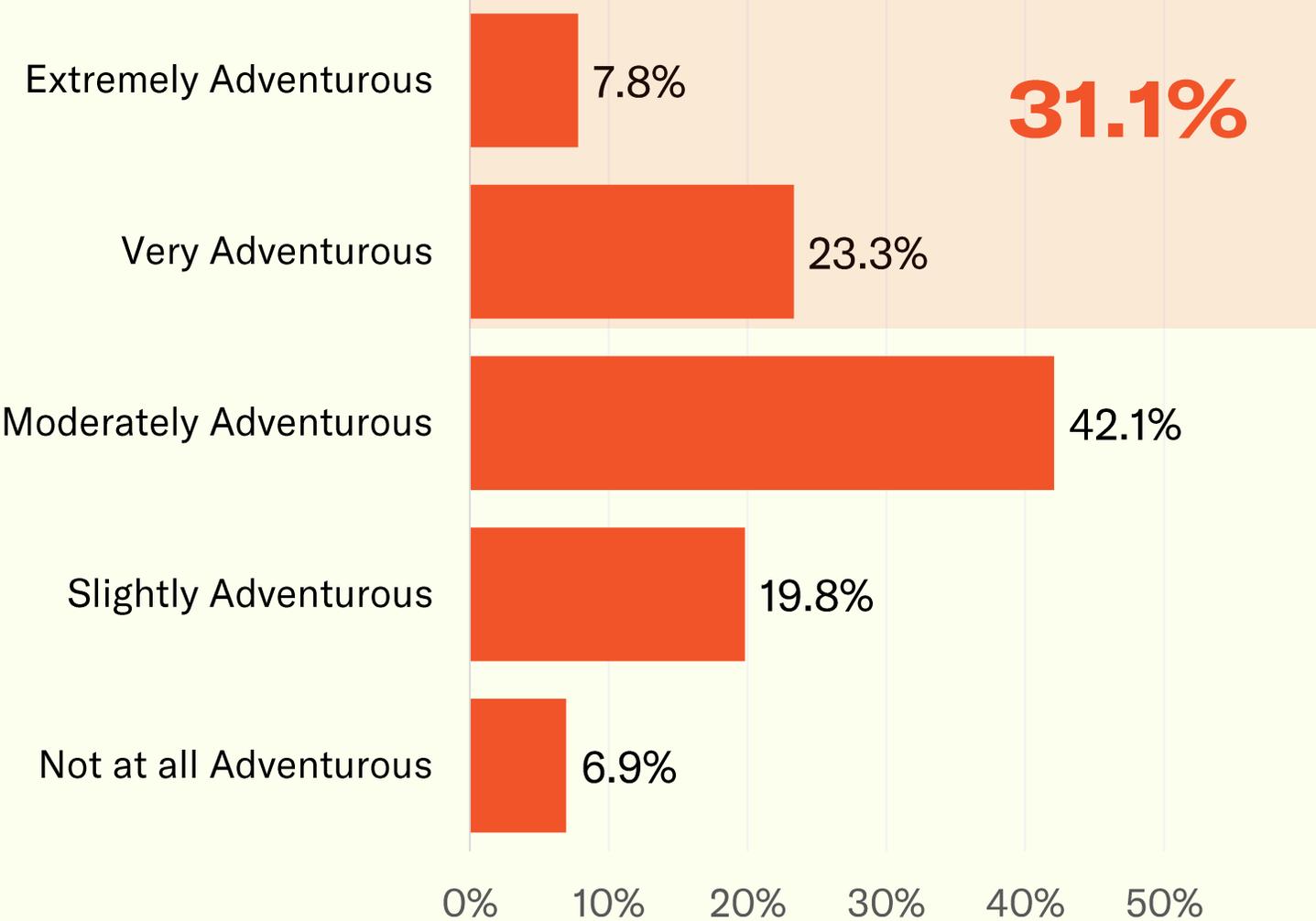
More than 40% of Travelers Often or Always Plan their Leisure Trips Specifically to Support Their Well-Being

Question:
How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?

43.7%

- Always — 13.3%
- Often — 30.4%
- Sometimes — 35.4%
- Rarely — 14.9%
- Never — 6.1%

0%   20%   40%

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The Majority of Travelers Consider Themselves Adventurous Travelers

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

31.1%

Extremely Adventurous — 7.8%

Very Adventurous — 23.3%

Moderately Adventurous — 42.1%

Slightly Adventurous — 19.8%

Not at all Adventurous — 6.9%

0%   10%   20%   30%   40%   50%

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Spontaneity is Not a Frequent Motivator

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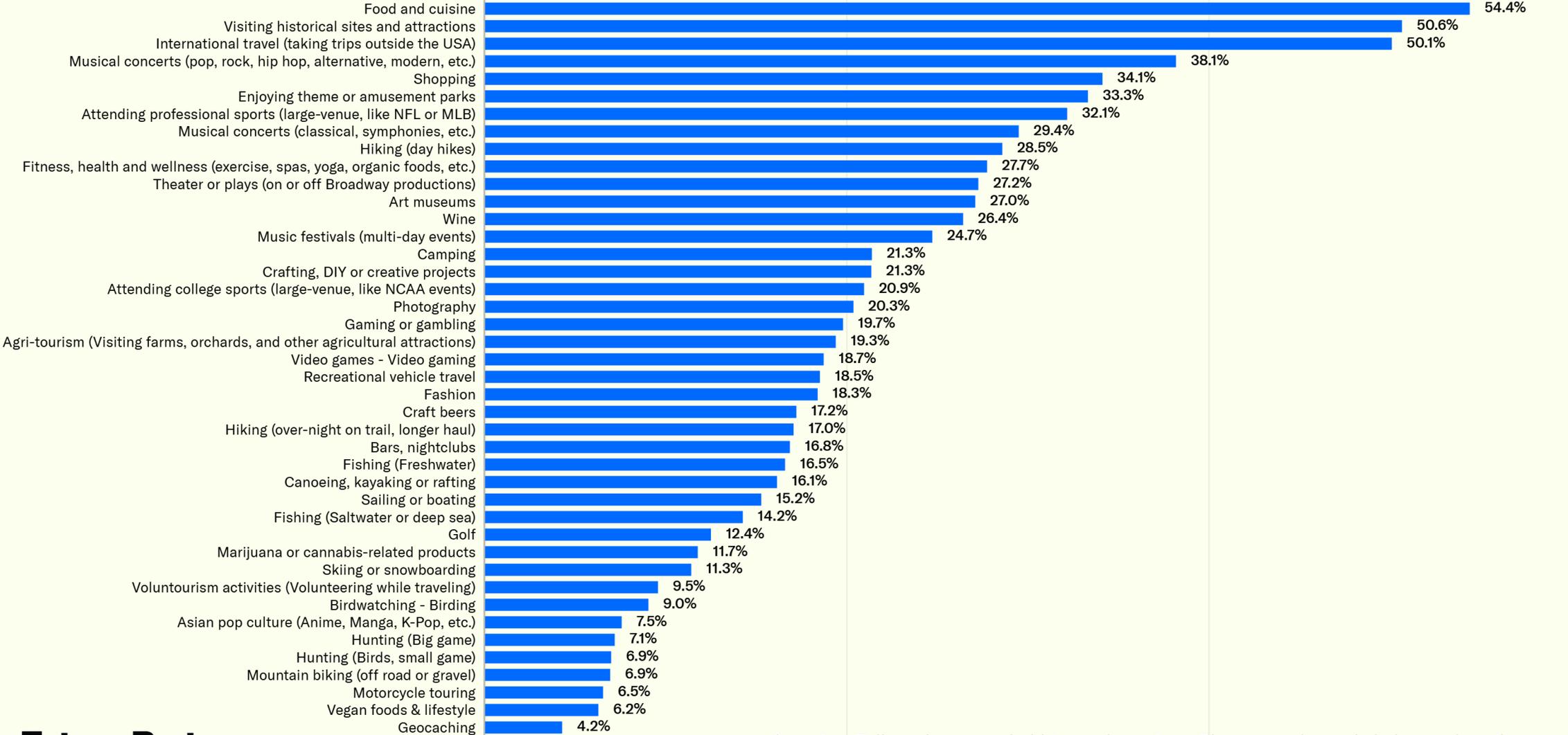How often do you take spontaneous leisure trips (i.e., trips sparked by impulse which begin soon after the idea arises)?

16.7%

Very Frequently — 4.0%

Frequently — 12.7%

Occasionally — 40.4%

Rarely — 35.2%

Never — 7.8%

0% 10% 20% 30% 40% 50%
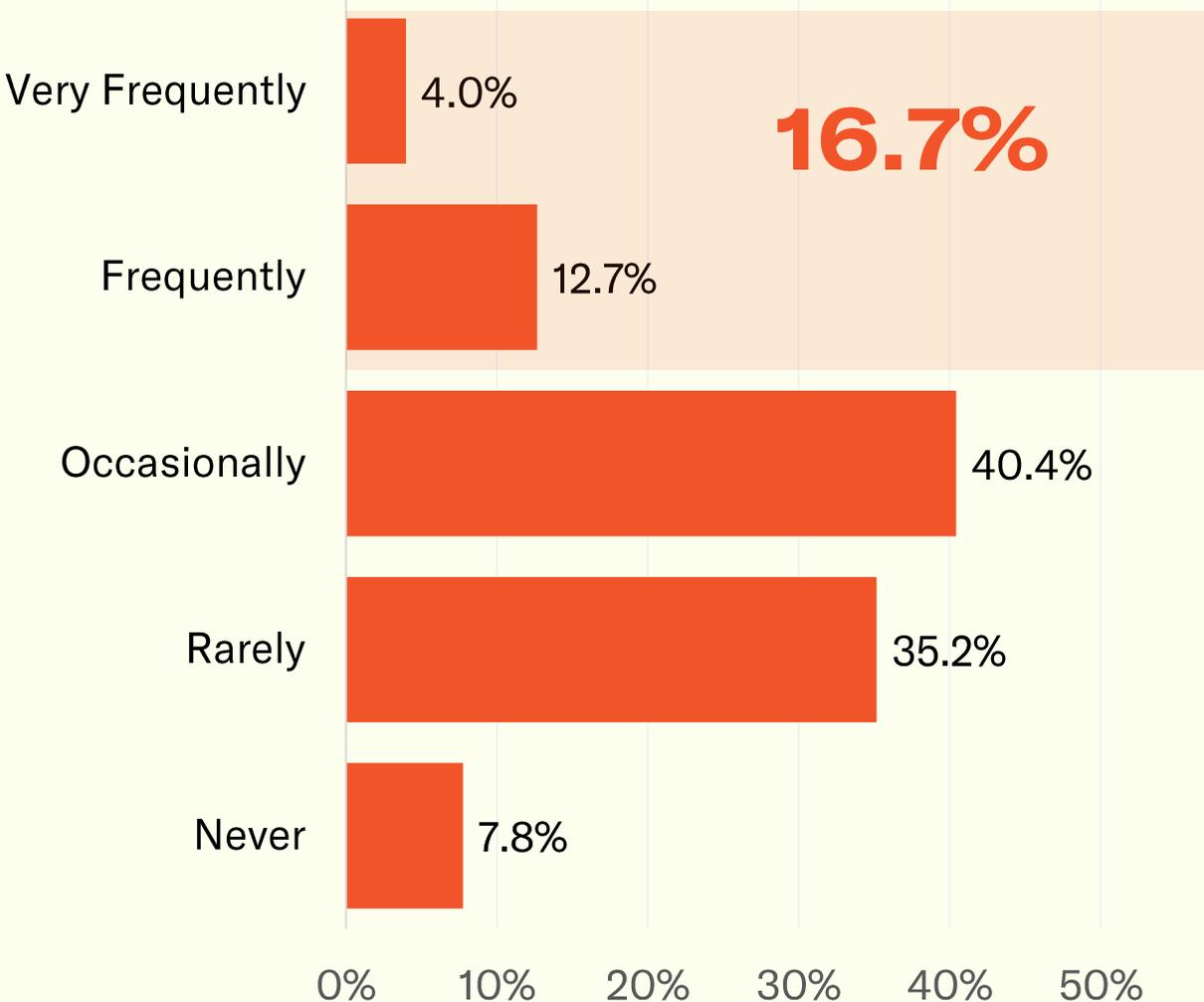
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Travelers' Passions & Hobbies Underlie Destination Decisions

Travel Passions & Hobbies

(Top 2 Box - % selecting "Extremely high interest" or "High interest")

Passion/Hobby	%
Food and cuisine	54.4%
Visiting historical sites and attractions	50.6%
International travel (taking trips outside the USA)	50.1%
Musical concerts (pop, rock, hip hop, alternative, modern, etc.)	38.1%
Shopping	34.1%
Enjoying theme or amusement parks	33.3%
Attending professional sports (large-venue, like NFL or MLB)	32.1%
Musical concerts (classical, symphonies, etc.)	29.4%
Hiking (day hikes)	28.5%
Fitness, health and wellness (exercise, spas, yoga, organic foods, etc.)	27.7%
Theater or plays (on or off Broadway productions)	27.2%
Art museums	27.0%
Wine	26.4%
Music festivals (multi-day events)	24.7%
Camping	21.3%
Crafting, DIY or creative projects	21.3%
Attending college sports (large-venue, like NCAA events)	20.9%
Photography	20.3%
Gaming or gambling	19.7%
Agri-tourism (Visiting farms, orchards, and other agricultural attractions)	19.3%
Video games - Video gaming	18.7%
Recreational vehicle travel	18.5%
Fashion	18.3%
Craft beers	17.2%
Hiking (over-night on trail, longer haul)	17.0%
Bars, nightclubs	16.8%
Fishing (Freshwater)	16.5%
Canoeing, kayaking or rafting	16.1%
Sailing or boating	15.2%
Fishing (Saltwater or deep sea)	14.2%
Golf	12.4%
Marijuana or cannabis-related products	11.7%
Skiing or snowboarding	11.3%
Voluntourism activities (Volunteering while traveling)	9.5%
Birdwatching - Birding	9.0%
Asian pop culture (Anime, Manga, K-Pop, etc.)	7.5%
Hunting (Big game)	7.1%
Hunting (Birds, small game)	6.9%
Mountain biking (off road or gravel)	6.9%
Motorcycle touring	6.5%
Vegan foods & lifestyle	6.2%
Geocaching	4.2%

Future Partners

Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.
(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

Base: American Travelers, 2026 YTD respondents. 4,022 completed surveys.

Travel Passions Follow a Life Stage Arc—Although Food Bridges All

Gen Z

"Who Am I?"

- Nightlife · festivals
- Fashion · shopping
- P hotography · gaming

Intl. travel passion: **~65%**

Millennials

"Balance + experience"

- Concerts · theme parks
- Fitness · wellness
- Hiking · outdoors

Intl. travel passion: **~60%**

Gen X

"How does this fit my life?"

- Wine · art museums
- Theater · cultural
- Skiing · golf emerging

Intl. travel passion: **~50%**

Boomers

"What do I enjoy deeply?"

- Historical sites
- Wine · theater
- Museums · golf

Intl. travel passion: **~40%**

Food & cuisine: the only truly universal passion

~45–58% across ALL generations — the single most reliable hook for any destination

For Upcoming Summer Trips, Beach Rules, but Cities and Outdoors are Strong
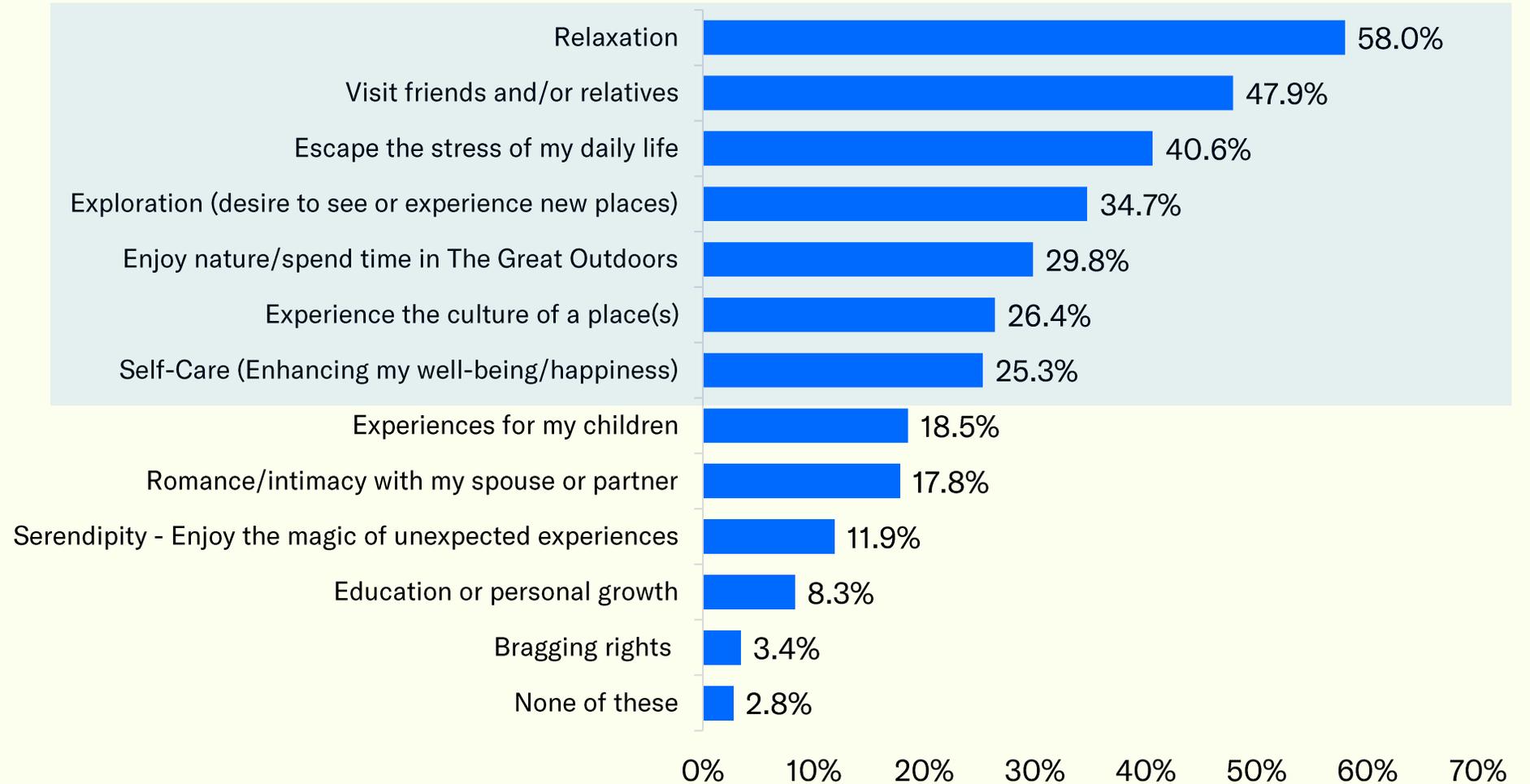
Question:
On your summer leisure trips, what types of destinations do you expect to visit this summer?

Destination	Percentage
Beach / Coastal	53.4%
Large city / urban areas	38.5%
State/National Park	29.4%
Small town / Rural area	24.5%
Mountains	23.3%
Lake destination	17.6%
International destination	16.0%
Theme park	15.7%
Multi-stop road trip	15.5%
All-inclusive resort	8.5%
NONE OF THESE	3.3%

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys

Relaxation and Reconnecting Dominate Summer Travel Motives

Question:
Which of the following best describe why you are traveling this summer?

Motive	Percentage
Relaxation	58.0%
Visit friends and/or relatives	47.9%
Escape the stress of my daily life	40.6%
Exploration (desire to see or experience new places)	34.7%
Enjoy nature/spend time in The Great Outdoors	29.8%
Experience the culture of a place(s)	26.4%
Self-Care (Enhancing my well-being/happiness)	25.3%
Experiences for my children	18.5%
Romance/intimacy with my spouse or partner	17.8%
Serendipity - Enjoy the magic of unexpected experiences	11.9%
Education or personal growth	8.3%
Bragging rights	3.4%
None of these	2.8%

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys

Experiences Sought for Upcoming Trips: Water, Food, Nature and the Open Road

Question:
Which trip experiences are you prioritizing this summer?

Experience	Percentage
Beaches/water	41.0%
Local food scene	27.2%
Scenic drives	27.1%
State/National parks	26.8%
Museums/culture	19.3%
"Hidden gems"	17.8%
International experiences	15.4%
Shopping	15.3%
Festivals/Special events	13.9%
Live music/nightlife	13.6%
Kid-friendly activities	13.6%
Wineries, breweries or distilleries	13.5%
Cultural events	13.2%
Luxury experiences	11.9%
Professional sporting events	9.2%
Wellness/spa	8.6%
College sporting events	4.0%
Youth sporting events	3.7%
NONE OF THESE	9.2%

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys

While Beach Destination Travelers are Primarily Focused on the Water and Wellness, Urban Destination-Goers are Seeking Food, Museums, Festivals and Nightlife. Nature-Based Destination-Choosers want Scenic Drives and Parks, while Small Town Goers are Most Apt Towards Hidden Gems and Kid-Friendliness

Experience	Beach	Urban	Parks/Nature	Small Town
Beaches/water	~85%	~25%	~20%	~18%
Food scene	~45%	~70%	~35%	~30%
Scenic drives	~40%	~25%	~65%	~60%
Parks	~30%	~20%	~80%	~55%
Museums/culture	~28%	~65%	~22%	~25%
Hidden gems	~42%	~45%	~60%	~65%
Festivals/events	~35%	~55%	~30%	~28%
Nightlife	~30%	~50%	~15%	~12%
Kid-friendly	~38%	~35%	~45%	~50%
Wellness/spa	~42%	~25%	~30%	~35%

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Risk Concerns Affect Destination Choice Right Now

% High concern or Moderate Concern

Question:
Think about how you will be evaluating the places you choose to visit this summer.

How concerned are you about the following affecting your destination choice this summer?

Category	Percentage
Excessive heat (temperatures)	40.1%
Crowd levels	36.7%
Political unrest / protests	32.6%
Wildfires	26.7%
Hurricanes	22.8%

0% 10% 20% 30% 40% 50%

Base: Respondents who plan to take at least one overnight summer leisure trip, 1,668 completed surveys
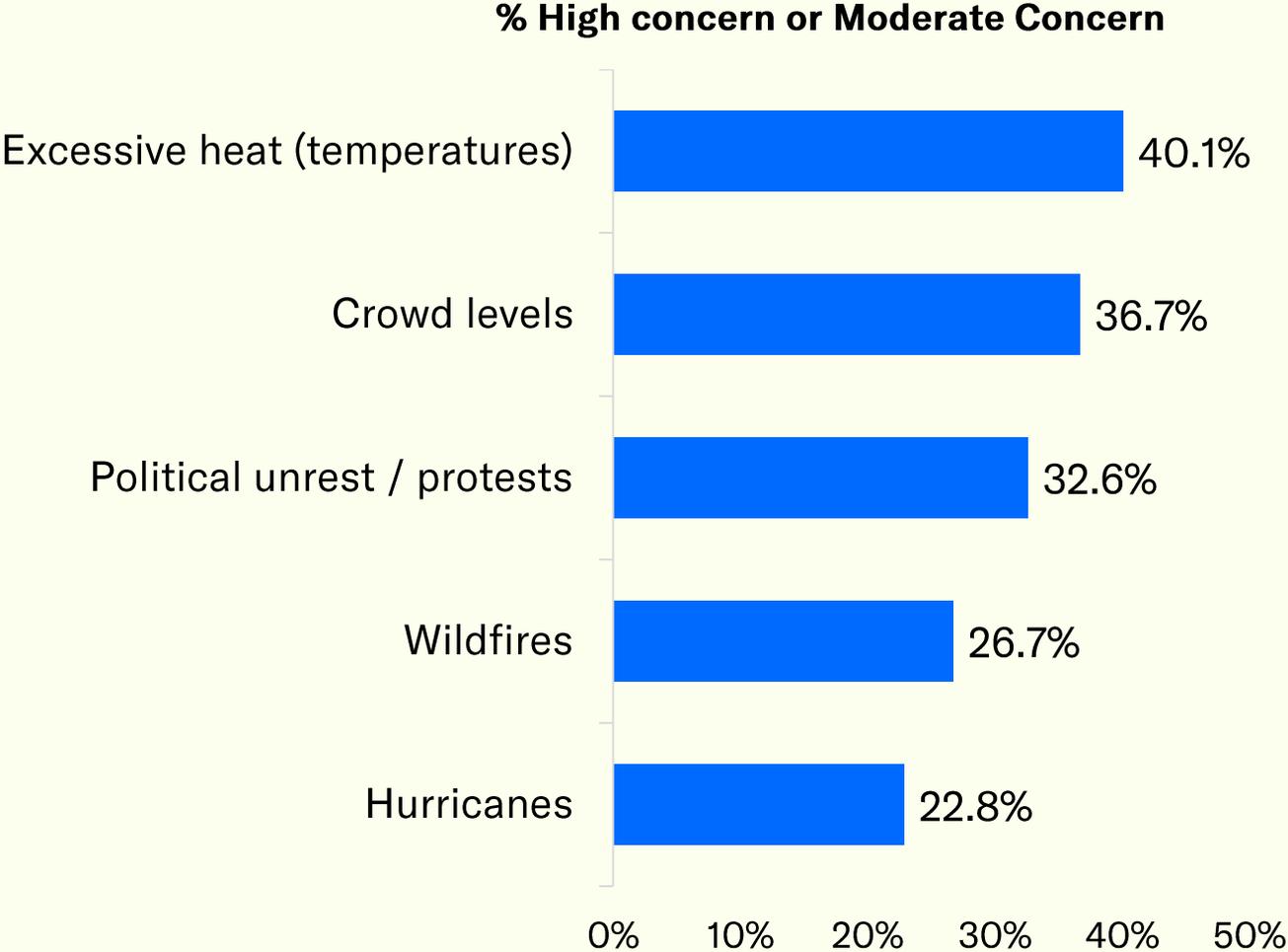
Risk Factors Vary in Importance by Destination Choice

Risk Sensitivity by Destination Type

Factor	Beach	Urban	Parks/Nature	Small Town
Excessive heat	~55%	45%	40%	42%
Crowds	50%	~65%	48%	45%
Wildfires	15%	12%	~45%	30%
Hurricanes	40%	10%	8%	12%
Political unrest	25%	35%	20%	~18%

Key differences

Beach

Highly sensitive to:

- Heat (~55%)
- Hurricanes (~40% — unique to this segment)

Urban

Most concerned about:

- Crowds (~65%)
- Political/social issues

Nature

Dominated by:

- Wildfire concern (~45% — 3x urban)

Small Town

- Lower overall risk sensitivity
- Moderate across all factors

Ful

Destination Choice in Summary : Different Motivations, Different Risk Assessments

Travel Motivations & Decision Questions by Trip Type

🏖️ BEACH TRIPS ➤ "I want to unwind"

- Primary driver: Relaxation (~70%+)
- Top priority: Beaches/water (~85%)
- Key concern: Heat & hurricanes (~40–55%)

👉 Decision: *"Will this feel easy, relaxing, and stress-free?"*

🏙️ CITY TRIPS ➤ "I want to experience more"

- Primary driver: Exploration & culture (~60–65%)
- Top priorities: Food scene (~70%), culture, nightlife
- Key concern: Crowds (~65%)

👉 Decision: *"How much can I do, see, and experience?"*

🌲 NATURE TRIPS ➤ "I want something meaningful"

- Primary driver: Nature connection (~75%)
- Top priorities: Parks (~80%), scenic drives (~65%)
- Key concern: Wildfires (~45%)

👉 Decision: *"Is this unique, authentic, and worth the effort?"*

🏘️ SMALL TOWN TRIPS ➤ "I want something different (but easy)"

- Primary drivers: Relaxation + discovery
- Top priorities: Hidden gems (~65%), family-friendly (~50%)
- Lower risk sensitivity overall

👉 Decision: *"Is this simple, enjoyable, and a little off the radar?"*

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American Travelers' Preferences Skew Towards Air Travel versus Road Trips
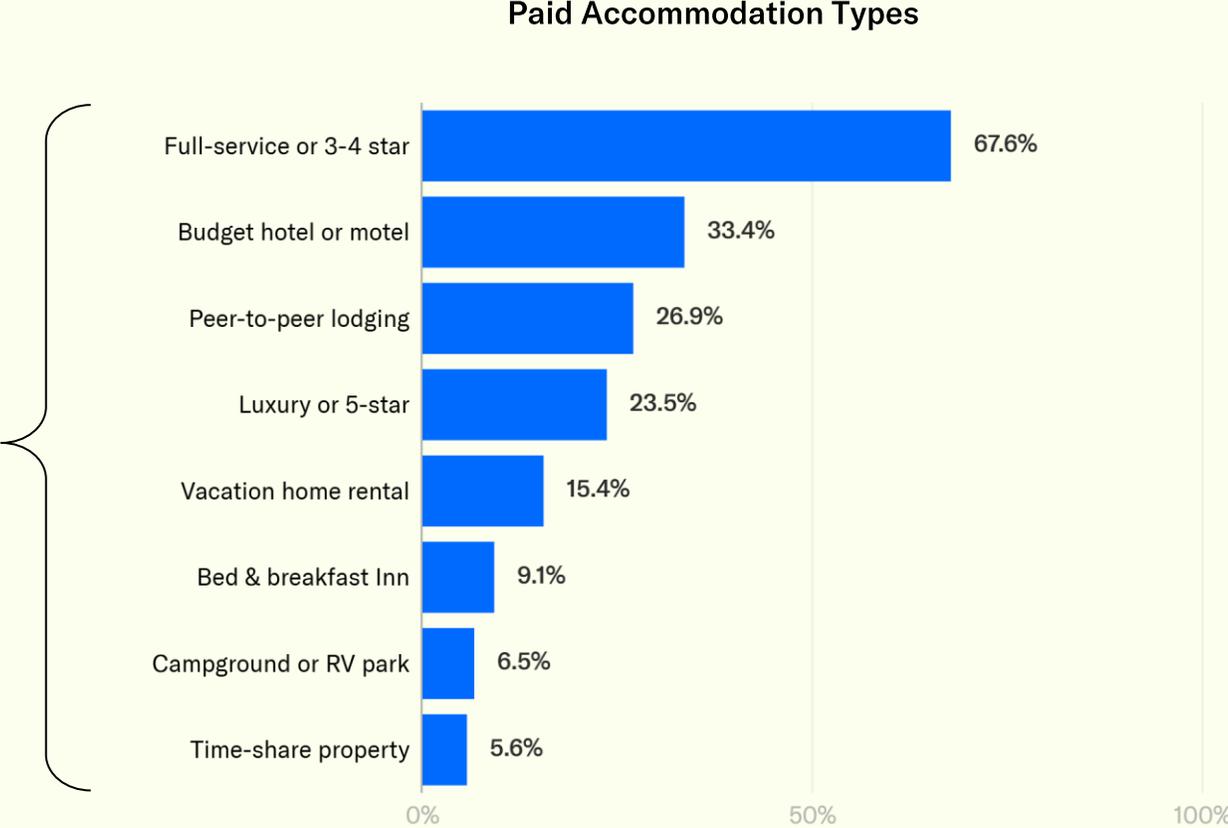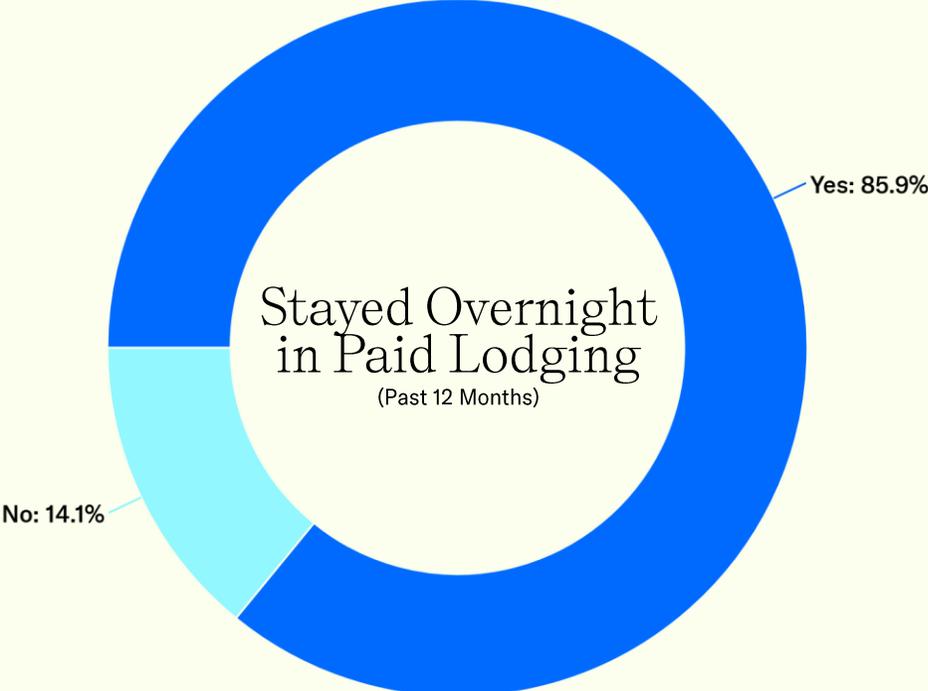
Question: Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)?

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

I Prefer
Road Trips

(% "Prefer" or "Strongly Prefer")

29.0%

I Prefer
Air Travel

(% "Prefer" or "Strongly Prefer")

44.3%
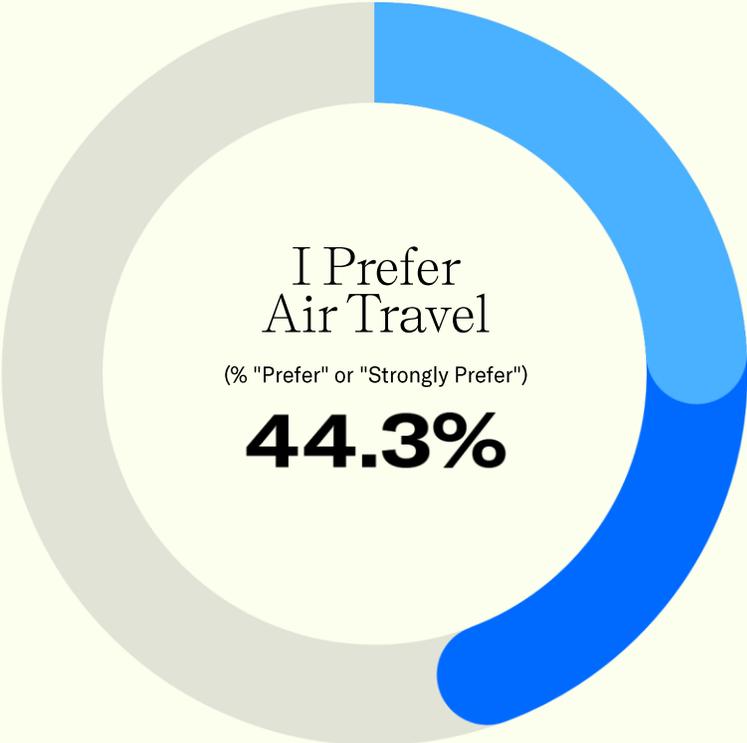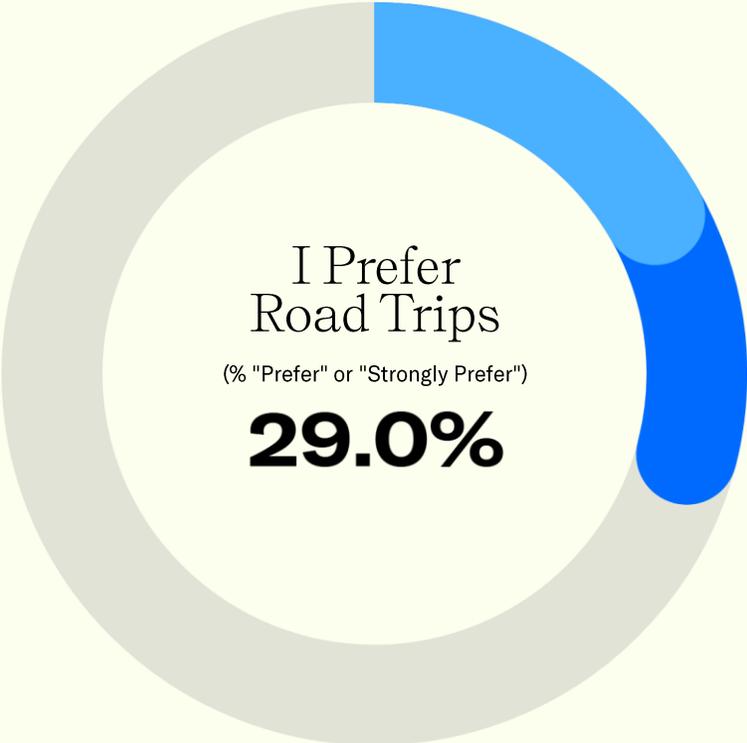
Prefer ●
Strongly Prefer ●

American Travelers' Typically Lean Towards Full-Service 3 or 4-Star Hotel Properties

Paid Accommodation Types

Stayed Overnight in Paid Lodging (Past 12 Months)

Yes: 85.9%
No: 14.1%

Accommodation Type	Percentage
Full-service or 3-4 star	67.6%
Budget hotel or motel	33.4%
Peer-to-peer lodging	26.9%
Luxury or 5-star	23.5%
Vacation home rental	15.4%
Bed & breakfast Inn	9.1%
Campground or RV park	6.5%
Time-share property	5.6%

0%   50%   100%

Future Partners   The State of the American Traveler

Domestic Hotspots

New York, Florida, and Las Vegas are the Top Three Most-Mentioned Desired Domestic Destinations among American Travelers
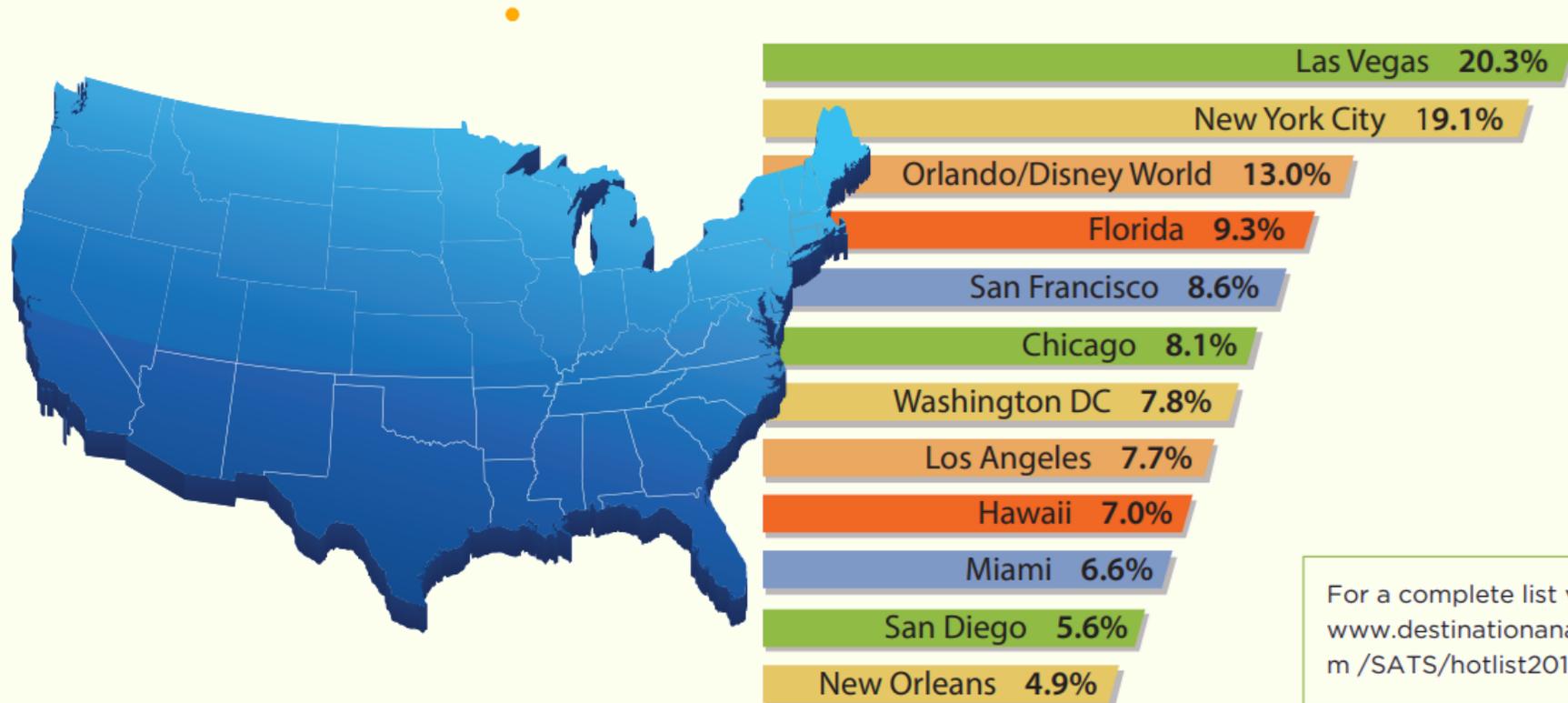
Question:
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five) (Please only include destinations in the United States)

Destination	Percentage
New York	17.5%
Florida	14.3%
Las Vegas	13.8%
California	7.7%
Chicago	6.7%
Hawaii	6.5%
Orlando	6.3%
Los Angeles	6.1%
Miami	5.5%
Texas	5.0%
San Diego	4.3%
Colorado	4.2%
New Orleans	4.1%
Seattle	4.1%
Boston	4.1%
San Francisco	3.8%
Washington, D.C.	3.6%
Arizona	3.3%
North Carolina	3.1%
Alaska	3.1%

0%   20%

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(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

A Look Back: *2016*

Most Desired U.S. Destinations — 2016

What are the five domestic destinations that you would most like to visit in the upcoming year? (OPEN ENDED)

Destination	Percentage
Las Vegas	20.3%
New York City	19.1%
Orlando/Disney World	13.0%
Florida	9.3%
San Francisco	8.6%
Chicago	8.1%
Washington DC	7.8%
Los Angeles	7.7%
Hawaii	7.0%
Miami	6.6%
San Diego	5.6%
New Orleans	4.9%

For a complete list visit www.destinationanalysts.com /SATS/hotlist2016

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Generation Drives Destination Desires

Top Aspired Destinations by Generation

Gen Z's New York Gravity

At 34.5%, Gen Z's pull toward New York is nearly double any other generation — a phenomenon with real targeting implications.

Destination	Gen Z	Millennial	Gen X	Boomer+
New York	34.5%	22.7%	17.4%	12.4%
Florida	24.6%	13.8%	14.0%	11.0%
Las Vegas	8.0%	17.4%	15.4%	12.0%
California	13.9%	10.0%	8.1%	4.3%
Miami	13.1%	9.7%	5.2%	1.8%
Los Angeles	11.1%	7.9%	5.7%	4.3%
Boston	12.9%	4.9%	3.9%	2.7%
Texas	10.6%	5.9%	4.4%	2.8%
Orlando	3.0%	6.9%	8.6%	4.9%
Hawaii	7.2%	8.7%	7.2%	4.7%

Income Shapes Destination Dreams

Top Aspired Destinations by Income Level

Destination	$200K+	$100–199K	$50–99K	<$50K
New York	**24.2%**	19.2%	16.4%	13.9%
Las Vegas	15.5%	16.0%	16.1%	9.8%
Florida	12.7%	13%	13.0%	**13.4%**
Hawaii	**13.2%**	9.1%	6.1%	3.5%
Orlando	7.5%	6.7%	5.7%	4.5%
California	8.2%	8.0%	7.5%	7.1%
Texas	3.0%	4.0%	4.6%	**5.5%**
Miami	6.2%	5.6%	5.4%	4.1%
Boston	5.9%	4.5%	3.3%	2.9%

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Destination Decisions: Upcoming Major Events

About One in Four Travelers are Interested in Taking a World Cup Trip

Question:
The FIFA World Cup men's soccer championship will be held next year in North America (USA, Mexico and Canada)?
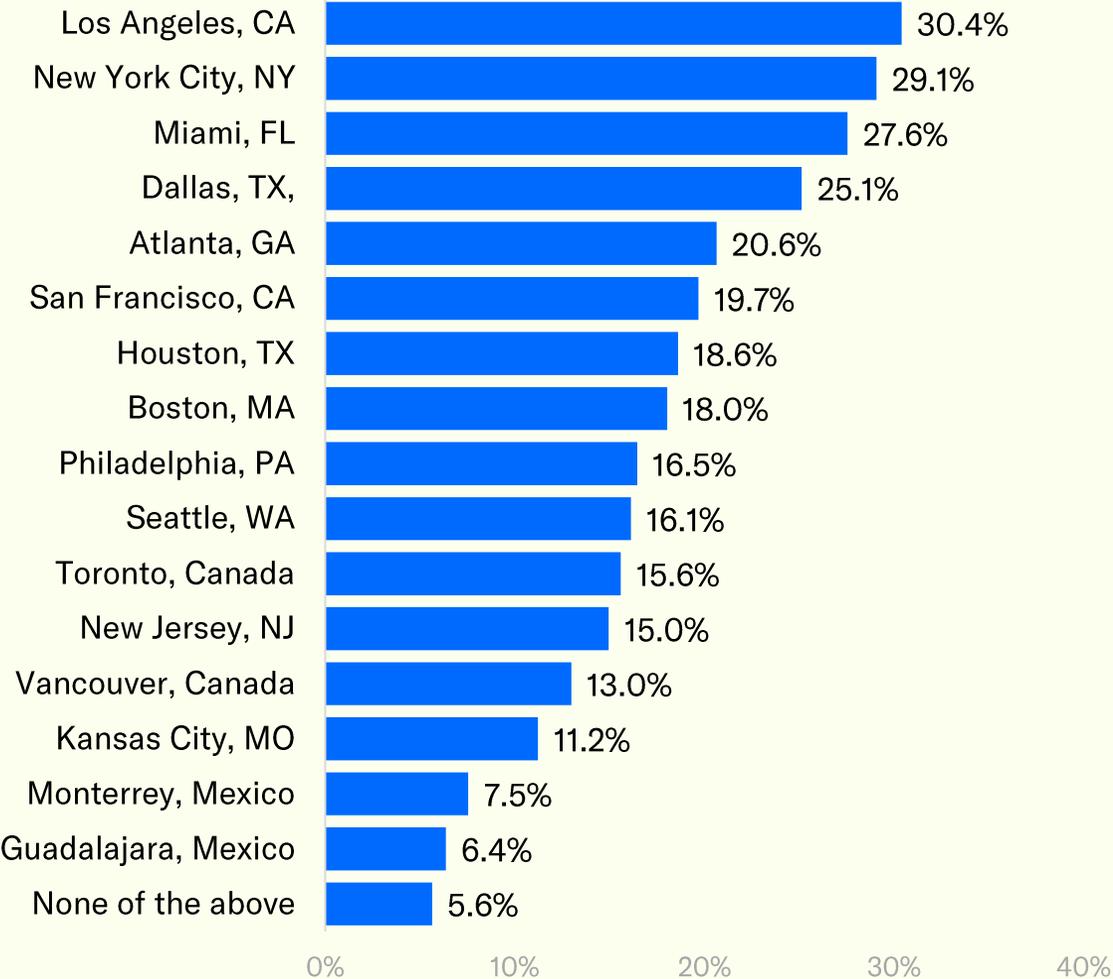
How interested would you be in traveling to experience FIFA World Cup games and events?

Very interested — 10.4%

Interested — 13.2%

23.6%

Neutral (neither interested nor uninterested) — 15.6%

Uninterested — 16.0%

Very uninterested — 44.8%

0%   20%   40%   60%

Future Partners
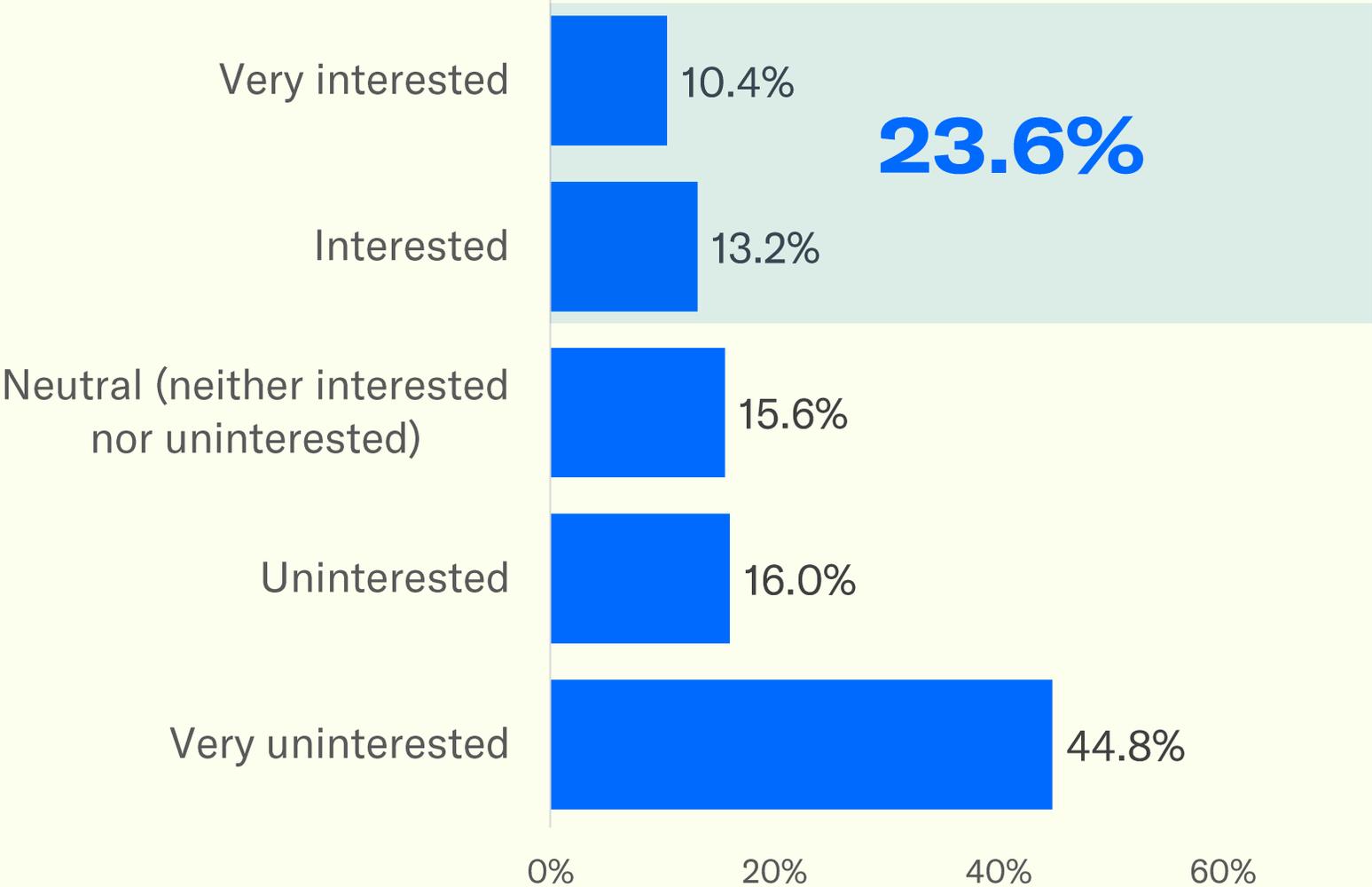
Coastal U.S. Cities Top the List of World Cup Destinations Travelers are Interested In

Question:
Which of the following destinations are you interested in traveling to attend a 2026 FIFA World Cup event(s) in the U.S.?
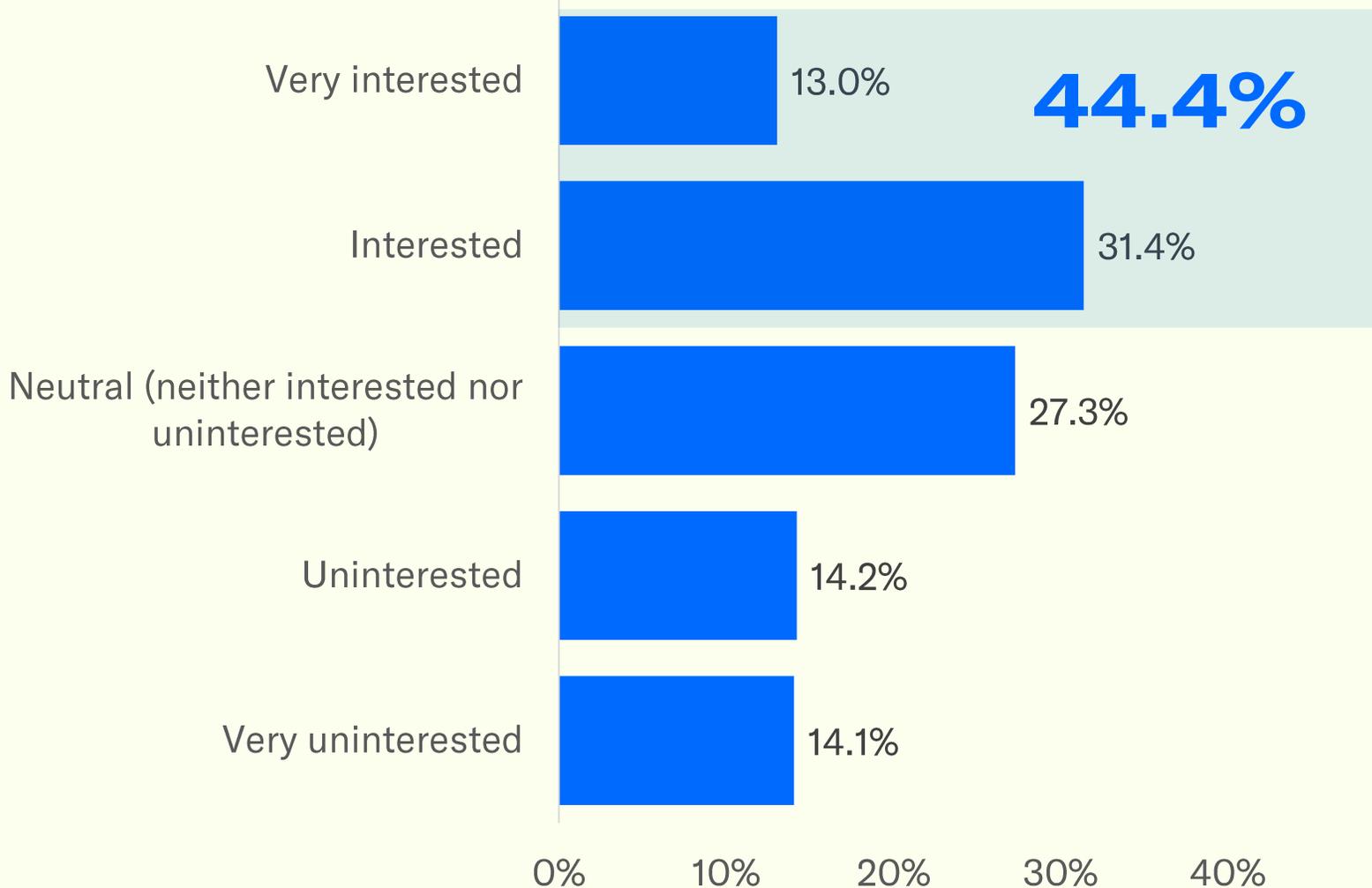
Destination	Percentage
Los Angeles, CA	30.4%
New York City, NY	29.1%
Miami, FL	27.6%
Dallas, TX,	25.1%
Atlanta, GA	20.6%
San Francisco, CA	19.7%
Houston, TX	18.6%
Boston, MA	18.0%
Philadelphia, PA	16.5%
Seattle, WA	16.1%
Toronto, Canada	15.6%
New Jersey, NJ	15.0%
Vancouver, Canada	13.0%
Kansas City, MO	11.2%
Monterrey, Mexico	7.5%
Guadalajara, Mexico	6.4%
None of the above	5.6%

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Interest is Higher for Traveling for Route 66 Centennial Celebrations

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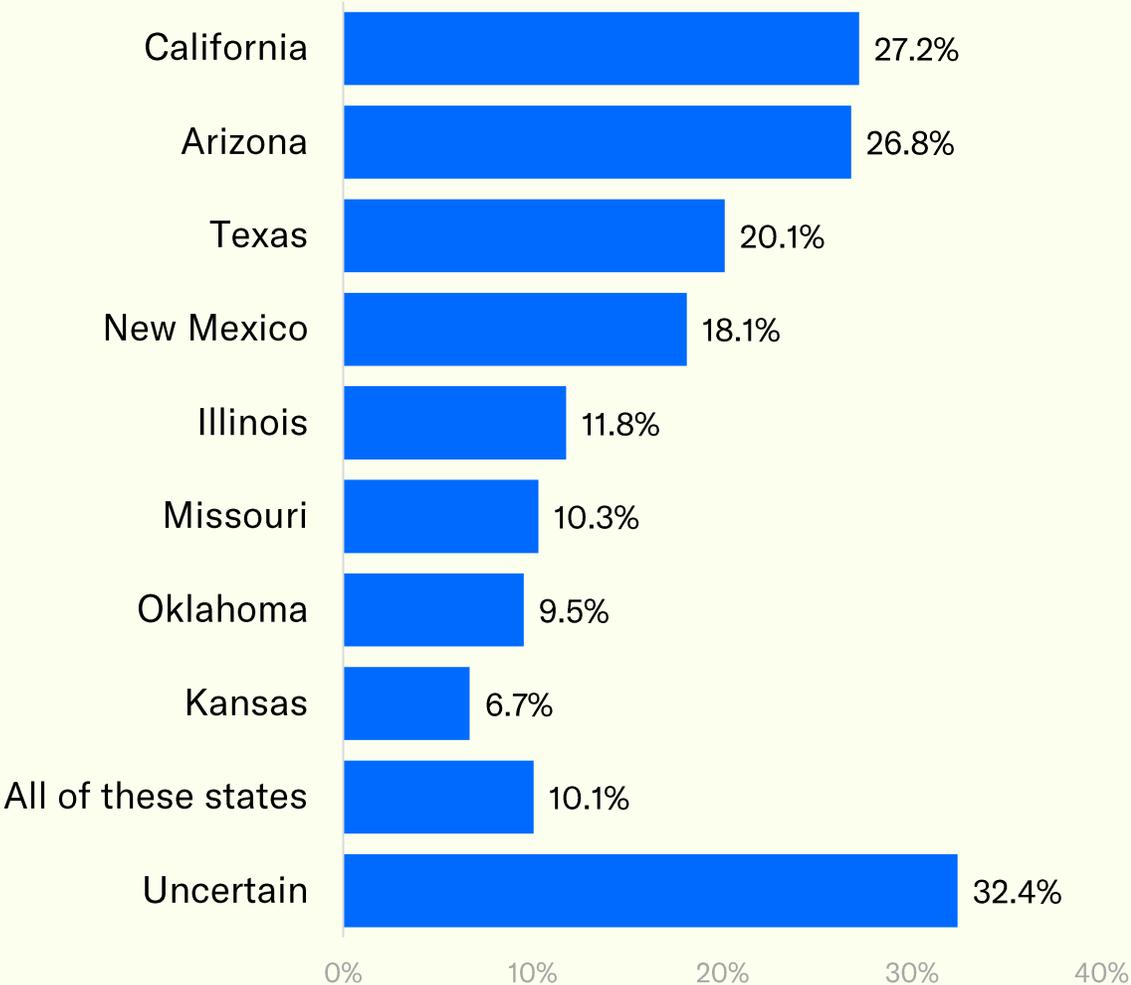
How interested would you be in traveling to enjoy these opportunities?

44.4%

Response	Percentage
Very interested	13.0%
Interested	31.4%
Neutral (neither interested nor uninterested)	27.3%
Uninterested	14.2%
Very uninterested	14.1%

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One-third of Route 66 Travelers are Still Deciding which Route 66 States to Visit

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

California — 27.2%
Arizona — 26.8%
Texas — 20.1%
New Mexico — 18.1%
Illinois — 11.8%
Missouri — 10.3%
Oklahoma — 9.5%
Kansas — 6.7%
All of these states — 10.1%
Uncertain — 32.4%

0%   10%   20%   30%   40%

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(Base: Respondents interested in traveling to a Route 66 anniversary event, 5,012 completed surveys. Data collected January and February 2026.)

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

America 250 Traveler
Top 2 Box Likelihood - "I am likely to travel to an America 250 Event"

Demographics

Origin Markets

Trip Volume & Value

Planning & Booking Details

Travel Brands

28.2%
of American Travelers are America 250 Travelers
(2025)

Future Partners   The State of the American Traveler

America 250 Travelers: Younger Families, High Education

Home

SPECIALTY PROFILES

America 250 Traveler

← Change Profile

Demographics >

Origin Markets >

Trip Volume & Value >

Planning & Booking Details >

Travel Brands >

Support

Settings

Demographics

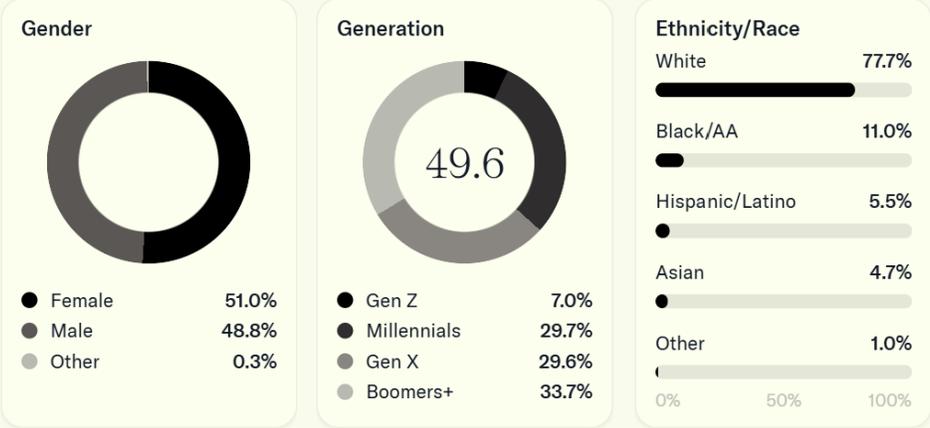**America 250 Traveler** | Top 2 Box Likelihood - "I am likely to travel to an America 250 Event"
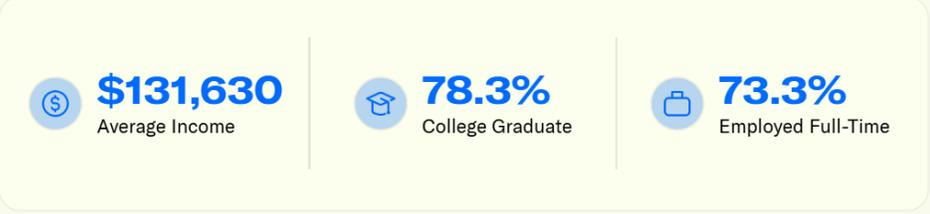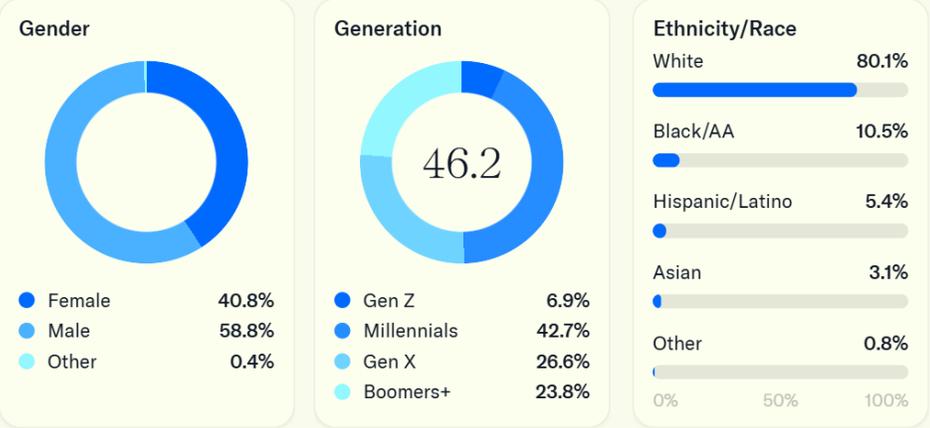
Year **2025** | Curated Collections **Total** | Filters **American Travelers** | **Total** | **Total**

American Travelers

Gender

- Female — 51.0%
- Male — 48.8%
- Other — 0.3%

Generation — 49.6

- Gen Z — 7.0%
- Millennials — 29.7%
- Gen X — 29.6%
- Boomers+ — 33.7%

Ethnicity/Race

- White — 77.7%
- Black/AA — 11.0%
- Hispanic/Latino — 5.5%
- Asian — 4.7%
- Other — 1.0%

0% 50% 100%

$113,722 Average Income

65.2% College Graduate

61.5% Employed Full-Time

Married/Partnered 55.7%

Children at Home 29.6%

LGBTQIA+ 7.3%

Accessibility Needs 14.0%

America 250 American Travelers

Gender

- Female — 40.8%
- Male — 58.8%
- Other — 0.4%

Generation — 46.2

- Gen Z — 6.9%
- Millennials — 42.7%
- Gen X — 26.6%
- Boomers+ — 23.8%

Ethnicity/Race

- White — 80.1%
- Black/AA — 10.5%
- Hispanic/Latino — 5.4%
- Asian — 3.1%
- Other — 0.8%

0% 50% 100%

$131,630 Average Income

78.3% College Graduate

73.3% Employed Full-Time

Married/Partnered 71.0%

Children at Home 51.9%
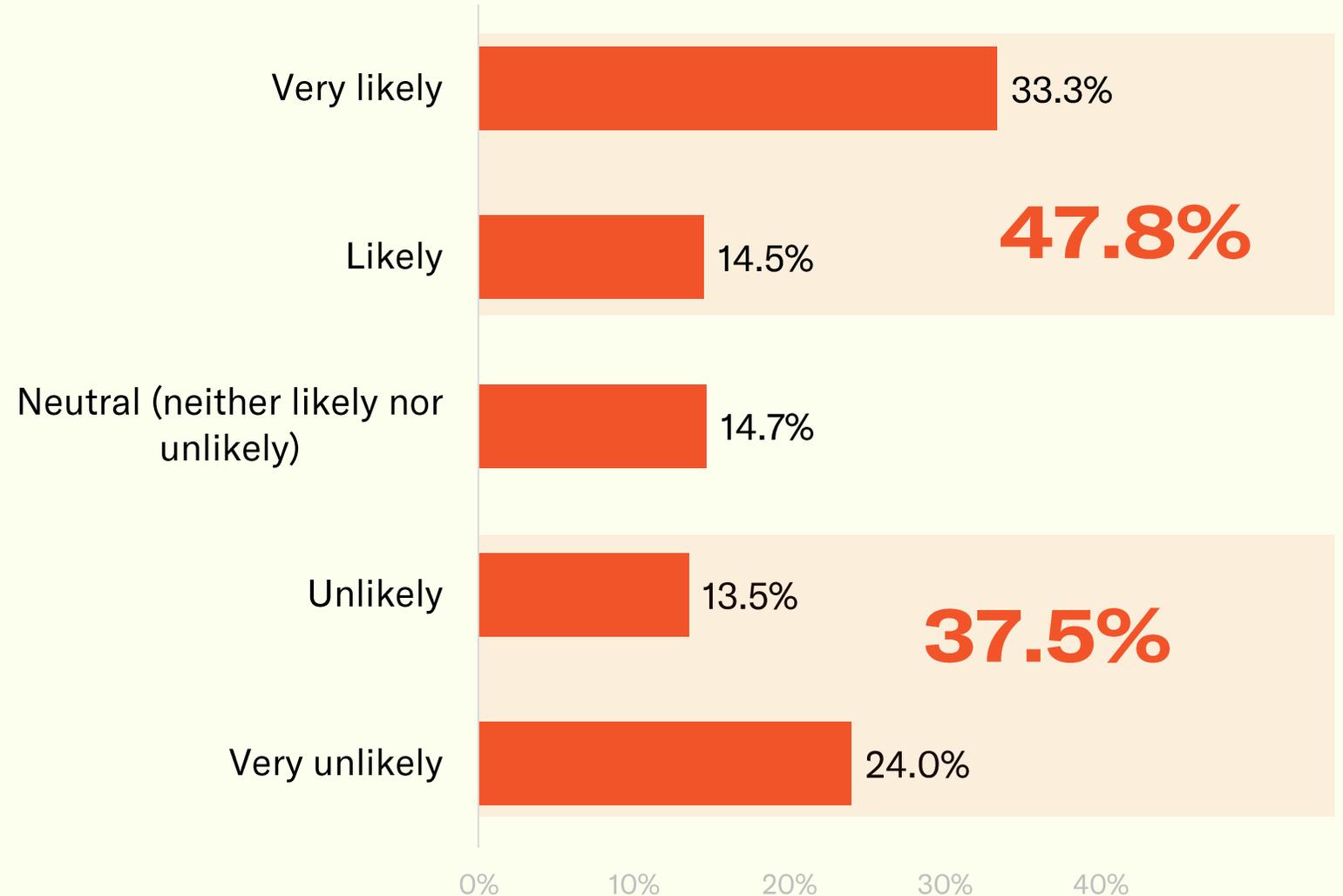
LGBTQIA+ 5.1%

Accessibility Needs 18.5%

International Hotspots
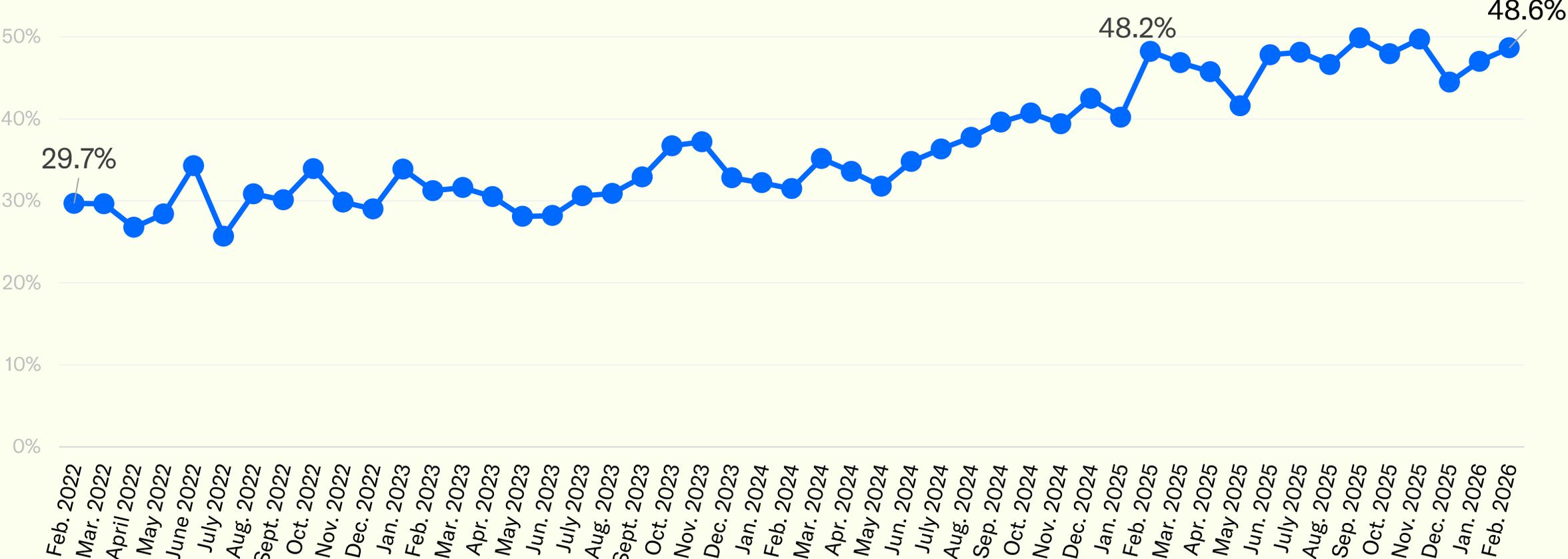
Nearly Half of American Travelers are Likely to Travel Abroad in 2026

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

Response	Percentage
Very likely	33.3%
Likely	14.5%
Neutral (neither likely nor unlikely)	14.7%
Unlikely	13.5%
Very unlikely	24.0%

47.8%

37.5%

0%   10%   20%   30%   40%

(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

International Travel Intent Has Risen Sharply and Stayed Elevated

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

29.7%

48.2%

48.6%

50%

40%

30%

20%

10%

0%

Feb. 2022, Mar. 2022, April 2022, May 2022, June 2022, July 2022, Aug. 2022, Sept. 2022, Oct. 2022, Nov. 2022, Dec. 2022, Jan. 2023, Feb. 2023, Mar. 2023, Apr. 2023, May 2023, Jun. 2023, July 2023, Aug. 2023, Sept. 2023, Oct. 2023, Nov. 2023, Dec. 2023, Jan. 2024, Feb. 2024, Mar. 2024, Apr. 2024, May 2024, Jun. 2024, July 2024, Aug. 2024, Sep. 2024, Oct. 2024, Nov. 2024, Dec. 2024, Jan. 2025, Feb. 2025, Mar. 2025, Apr. 2025, May 2025, Jun. 2025, July 2025, Aug. 2025, Sep. 2025, Oct. 2025, Nov. 2025, Dec. 2025, Jan. 2026, Feb. 2026

A Look Back:
2016

Future Partners

How do Americans Travel?

The vast majority of Americans are leisure travelers who have taken at least one trip (50 miles+ from home) in the past year. On average, Americans took 4.4 trips; with about one third taking five or more. Cities and metropolitan areas are by far the most visited destination type, with nearly three out of four of us planning to visit one this year. The second most frequented destination type will be "small towns, villages or rural destinations/attractions," with the average traveler visiting 1.1 such places in 2016. Beach destination and resorts will generate fewer visits, but still more than half of Americans will include them in our 2016 itineraries. Below are some fun facts on how Americans got away last year and how we plan to travel in 2016.

While only 56.0 percent of Americans expect to visit a beach destination or resort this year, they report the highest levels of excitement about these trips compared to other destination types.

Metropolitan areas are by far the most popular leisure destination type. 71.6 of American travelers say they will include a metropolitan area on a leisure trip this year.

77.5% of leisure travelers took more than one trip

30.5% of leisure trips were day trips

27.3% took five or more trips

4.4 is the average number of trips taken

78.3 percent of leisure travelers took no foreign adventures last year. On average, the 21.7 percent who did ventured abroad 1.9 times on average.

The cruise industry is big business, yet is used by a relatively smaller number of travelers. Only 11 percent of leisure travelers took an overnight cruise last year. The typical cruiser, however, took an average of two such trips.

While only one fourth (25%) of American leisure trips involved traveling by plane, 51.2 percent of travelers used an airline last year.

Mountain destinations or resorts, while somewhat less frequented, attract a significant share of travelers. 30 percent of leisure travelers expect to visit a mountain destination or resort this year. Desert destinations or resorts will be visited by about 15 percent of travelers.

37 percent of leisure travelers will take a trip that includes a theme or amusement park this year.

Destination Analysts   Destination Analysts, Inc. | January 2016

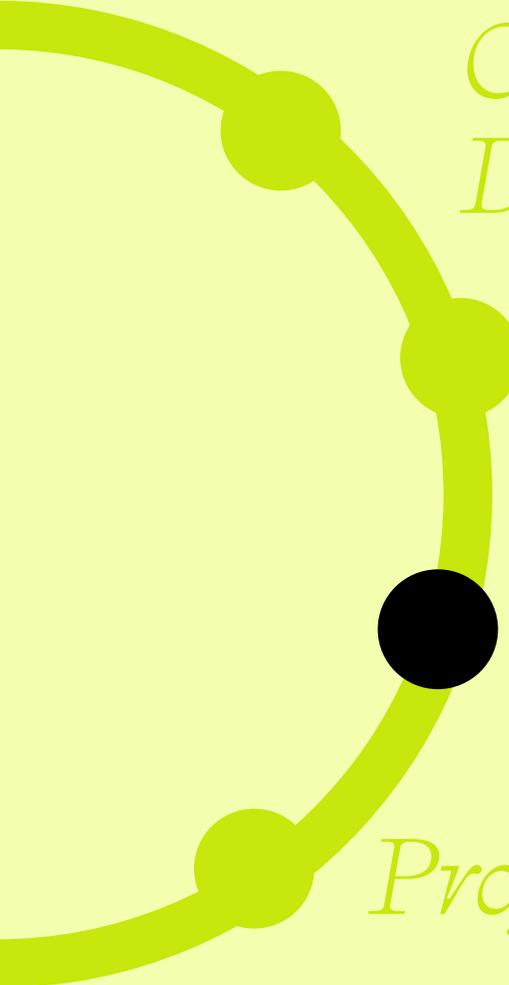# Top 15 International Destinations Americans Want to Visit in the Next 12 Months

Question:
Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations outside the United States)

Destination	Percentage
Italy	17.8%
Canada	12.2%
Mexico	11.9%
United Kingdom	11.7%
Japan	11.6%
France	8.4%
Paris	8.2%
London	7.6%
Spain	7.5%
Ireland	6.8%
Germany	6.3%
Greece	6.0%
Bahamas	4.6%
Australia	4.2%
Portugal	3.2%

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Today's Agenda

Current Travel Sentiment Framing Destination Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced: Media and Travel Tools

Profile of Off-Season and Dispersal Travelers

Future Partners   With Miles Partnership

Where travelers discover destinations has shifted — but not entirely to new resources. Online search leads as the most receptive channel, email is a close second, and AI is the only planning tool growing across every market.
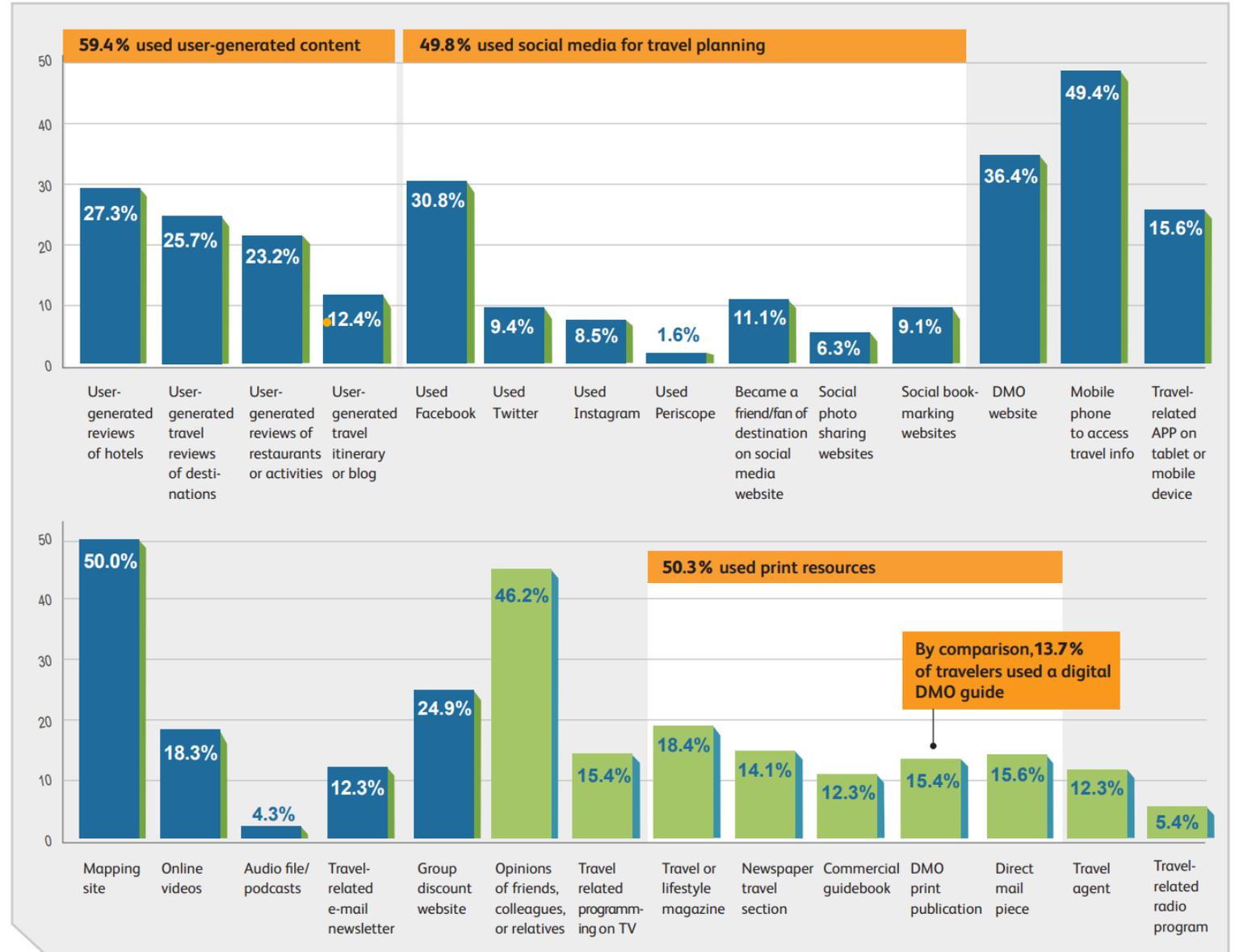
Future Partners

A Look Back: 2016

Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

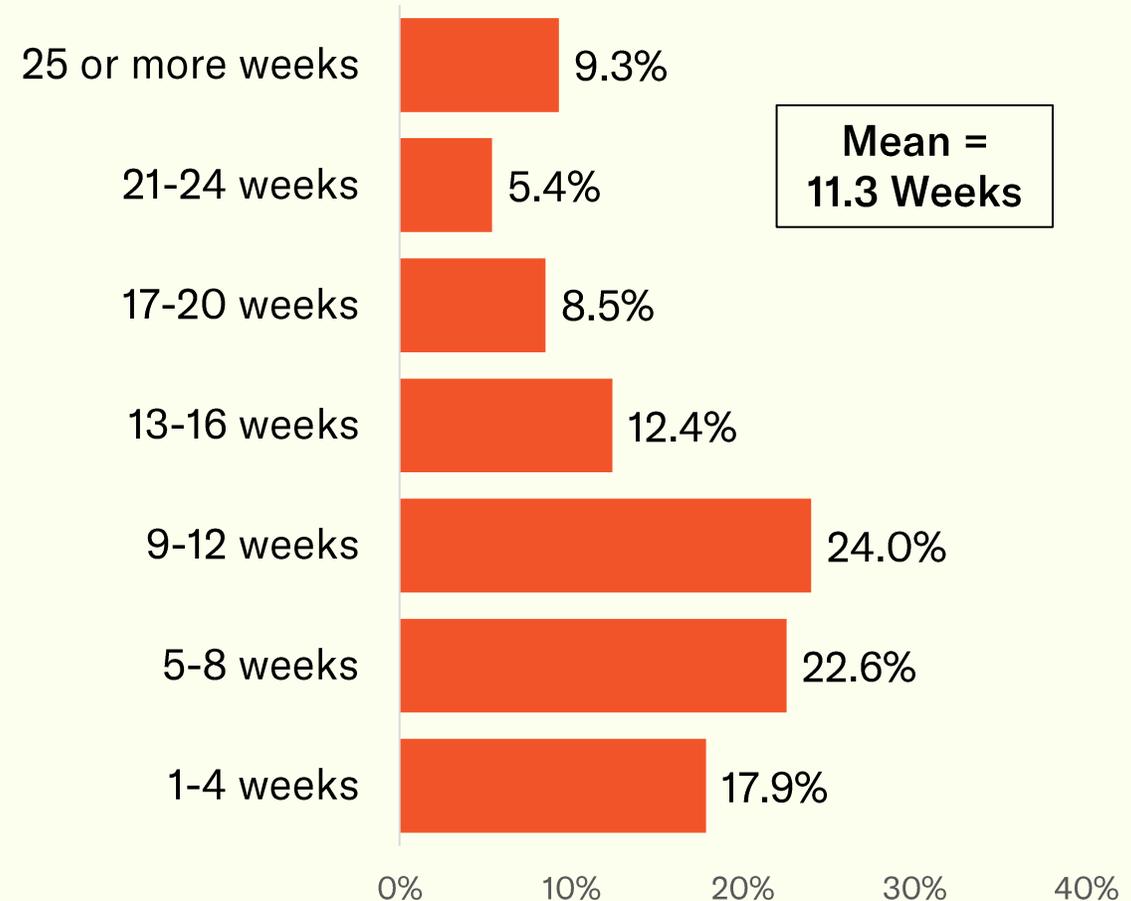**Q** In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)

● ONLINE
● OFFLINE

59.4% used user-generated content

49.8% used social media for travel planning

Category	Value
User-generated reviews of hotels	27.3%
User-generated travel reviews of destinations	25.7%
User-generated reviews of restaurants or activities	23.2%
User-generated travel itinerary or blog	12.4%
Used Facebook	30.8%
Used Twitter	9.4%
Used Instagram	8.5%
Used Periscope	1.6%
Became a friend/fan of destination on social media website	11.1%
Social photo sharing websites	6.3%
Social book-marking websites	9.1%
DMO website	36.4%
Mobile phone to access travel info	49.4%
Travel-related APP on tablet or mobile device	15.6%

50.3% used print resources

By comparison, 13.7% of travelers used a digital DMO guide

Category	Value
Mapping site	50.0%
Online videos	18.3%
Audio file/podcasts	4.3%
Travel-related e-mail newsletter	12.3%
Group discount website	24.9%
Opinions of friends, colleagues, or relatives	46.2%
Travel related programming on TV	15.4%
Travel or lifestyle magazine	18.4%
Newspaper travel section	14.1%
Commercial guidebook	12.3%
DMO print publication	15.4%
Direct mail piece	15.6%
Travel agent	12.3%
Travel-related radio program	5.4%

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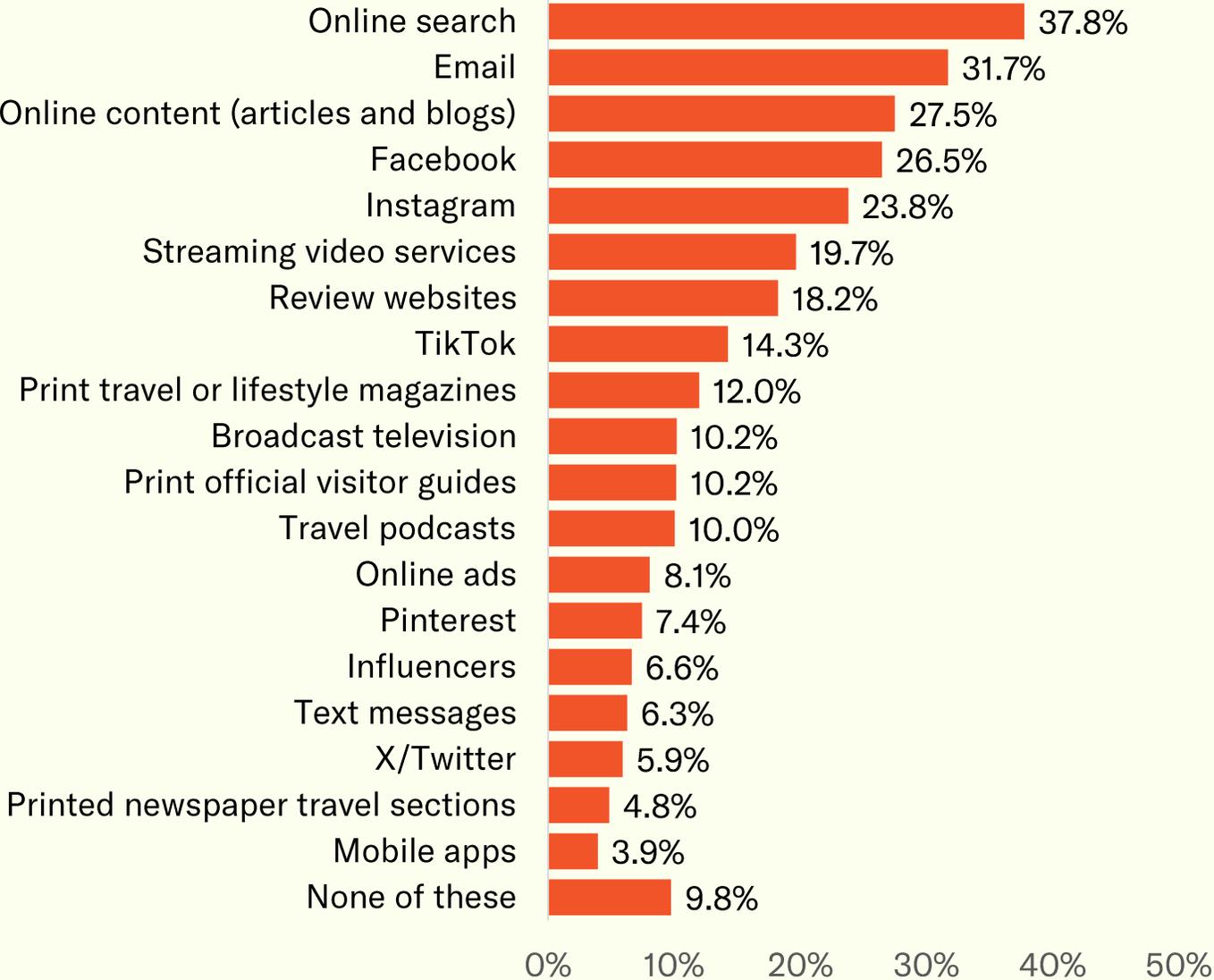# Roughly Two-thirds of American Travelers Would Spend Three Months or Less Planning a Domestic Leisure Trip

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

Mean = 11.3 Weeks

25 or more weeks — 9.3%
21-24 weeks — 5.4%
17-20 weeks — 8.5%
13-16 weeks — 12.4%
9-12 weeks — 24.0%
5-8 weeks — 22.6%
1-4 weeks — 17.9%

0% 10% 20% 30% 40%

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Online Search Still Leads as the Top Channel for Destination Marketing

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)

Channel	Percentage
Online search	37.8%
Email	31.7%
Online content (articles and blogs)	27.5%
Facebook	26.5%
Instagram	23.8%
Streaming video services	19.7%
Review websites	18.2%
TikTok	14.3%
Print travel or lifestyle magazines	12.0%
Broadcast television	10.2%
Print official visitor guides	10.2%
Travel podcasts	10.0%
Online ads	8.1%
Pinterest	7.4%
Influencers	6.6%
Text messages	6.3%
X/Twitter	5.9%
Printed newspaper travel sections	4.8%
Mobile apps	3.9%
None of these	9.8%

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(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

Social Media as a Destination Inspiration Sources 2022-2026

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)

% Selected

Legend: TikTok · Facebook · Instagram · X (formerly known as Twitter) · Pinterest

Labeled values on left: 22%, 15%, 9%

Labeled values on right: 25.2%, 22.7%, 13.1%, 6.5%, 5.7%

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(Base: All respondents, 4,000+ completed surveys each wave from 2022-2026.)
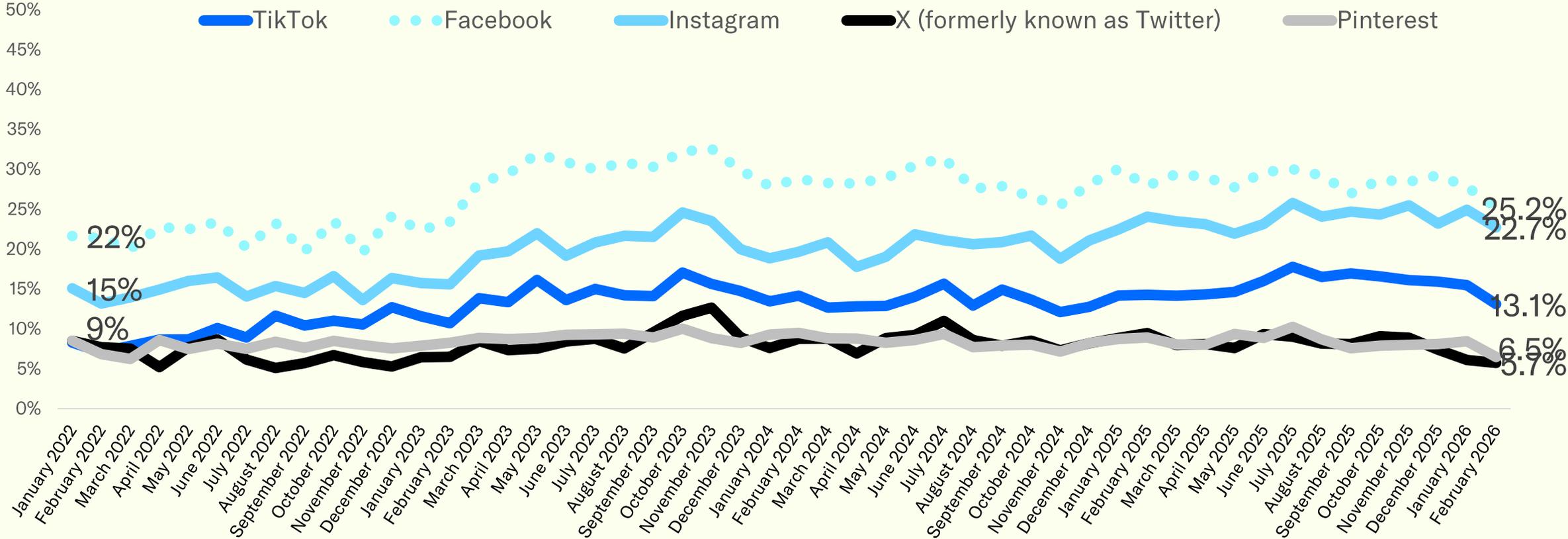
More than a Quarter of American Travelers Have Used AI to Plan Trips in the Past Year

Question:
In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?

- Yes, 26.3%
- No, 70.9%
- I don't know, 2.8%

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(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)
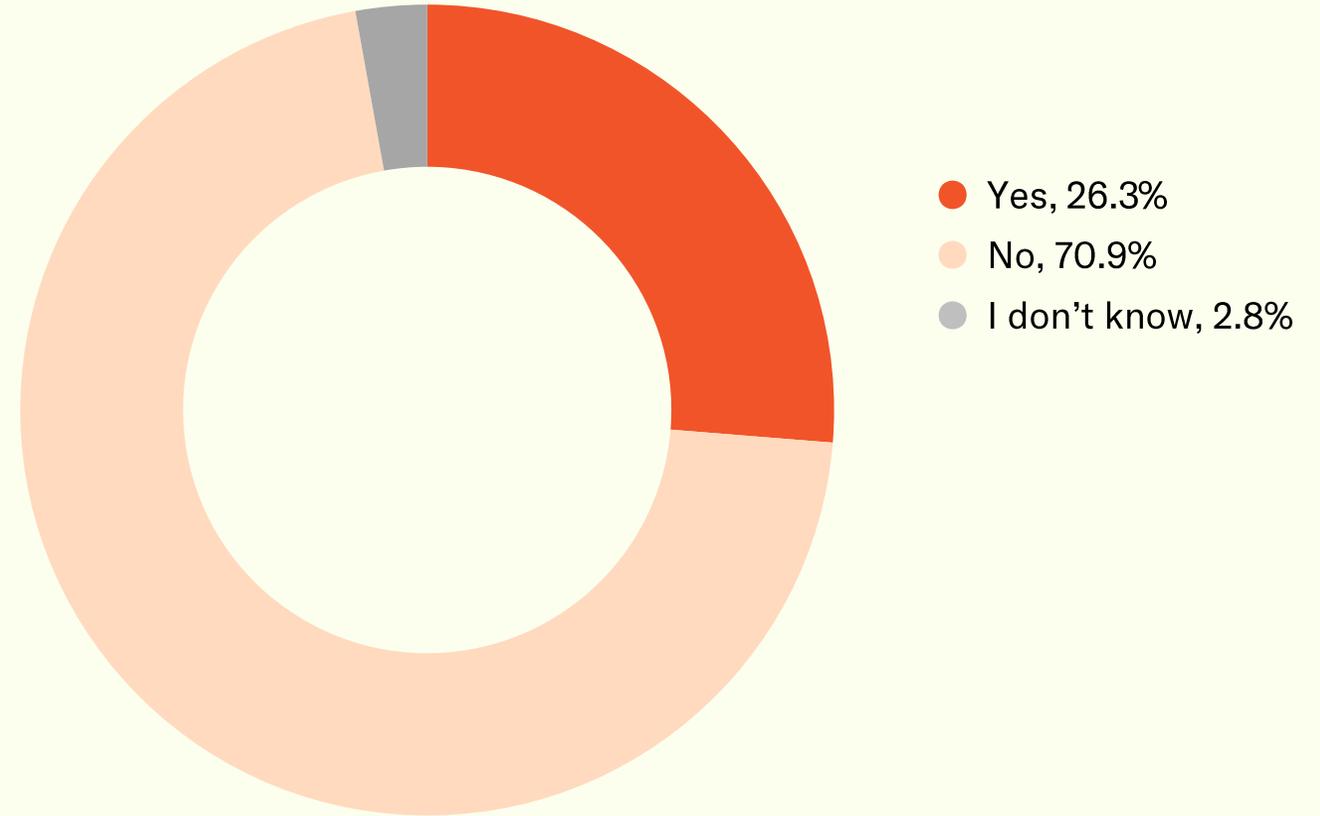
Media, Inspiration & Planning by Destination Type

Beach
Low-effort inspiration, low-friction planning

City
High-information, high-inspiration travelers

Nature / Park
Intentional, research-driven planners

Small Town / Rural
Discovery + trust-driven planning

Beach Travelers

Low-effort Inspiration, Low-friction Planning

◆ Top Inspiration Sources

- **Friends & family recommendations (very high)**
- **Social media (Instagram, TikTok)**
- Travel deal sites

Heavily driven by: *"That looks relaxing / I heard it's great"*

◆ Media Patterns

Visual-first:

- **Instagram**
- **TikTok**
- **Influencer content performs well**
- **Less research-heavy content**

◆ Planning Resources

- **OTAs (Expedia, Booking, etc.)**
- Package deals
- Airline + hotel bundles

Planning style: **Fast, simplified, price-aware**

City Travelers

High-information, High-inspiration Travelers

◆ Top Inspiration Sources

- **Online research (Google, travel guides)**
- Social media
- Travel websites / editorial content

Driven by: *"What's there to do? What's trending?"*

◆ Media Patterns

Mix of:

- Social (discovery)
- Search (validation)

Heavy use of:

- Lists
- "Top things to do"
- Food/travel content

◆ Planning Resources

Multiple platforms used:

- Google search
- Review sites (TripAdvisor, Yelp)
- Maps
- Less reliance on packages

Planning style: Iterative, research–heavy, optimized

Key Insight

City travelers are: **Active planners and information maximizers**

Nature/Park Travelers

Intentional, Research-driven Planners

◆ Top Inspiration Sources

- **Word of mouth (trusted sources)**
- Travel long-form content
- Search (destination-specific research)

Driven by: *"I want to go somewhere meaningful"*

◆ Media Patterns

- Less social-driven
- More: YouTube, Blogs, Guides

◆ Planning Resources

- **Direct research (park sites, official resources)**
- Itinerary planning tools
- Maps, logistics-heavy tools

Planning style: **Deliberate, detail-oriented, effort-accepting**

Small Town / Rural

Discovery + Trust-driven Planning

◆ Top Inspiration Sources

- **Word of mouth (very high)**
- "Hidden gem" content
- Social (but less influencer-heavy)

◆ Media Patterns

Discovery-oriented:

- **Blogs**
- **Niche content**
- **Less mainstream travel media**

◆ Planning Resources

Mix of:

- OTAs (for basics)
- Direct/local research

Planning style: **Light planning, but curiosity-driven**

Today's Agenda
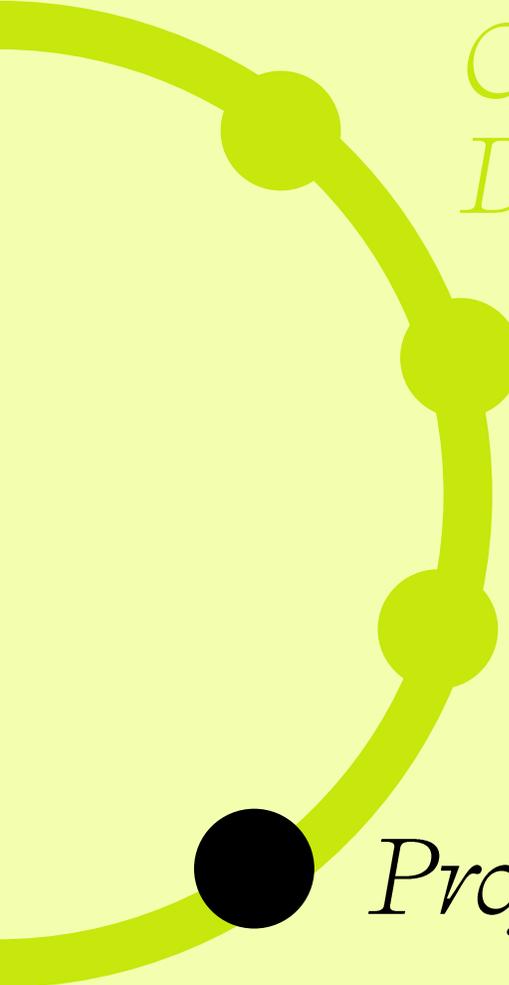
Current Travel Sentiment Framing Destination Decisions

Trip Motivators and Destination Drivers

Where Destination Decisions Get Influenced: Media and Travel Tools

Profile of Off-Season and Dispersal Travelers

Off-Season Travelers

- Took at least one overnight leisure trip during the off-season in the past 12 months

- 85.6% of off-season travelers have also taken trips during the peak season

Peak Season Travelers

- Took at least one overnight leisure trip during the peak season in the past 12 months AND did not take any overnight leisure trips during the off-peak season in the past 12 months

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Dispersal Travelers

- Traveled to lesser-known destinations or attractions in the past 2 years for at least some of their trips

Non-Dispersal Travelers

- Did not travel at all to lesser-known destinations or attractions in the past 2 years

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Off-Season and Dispersal Travelers Report Higher Average Household Incomes

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

Average Annual Household Income

- Off-Season Travelers: $130,724
- Peak Season Travelers: $103,769
- Dispersal Travelers: $127,747
- Non-Dispersal Travelers: $99,947

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Dispersal and Off-Season Travelers are More Likely to Frequently Take Spontaneous Leisure Trips

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

% Very Frequently or Frequently

Off-Season Travelers	Peak Season Travelers	Dispersal Travelers	Non-Dispersal Travelers
21.4%	12.9%	21.8%	7.3%

(Base: All respondents, 6,091 completed surveys. Data collected January and February 2026.)
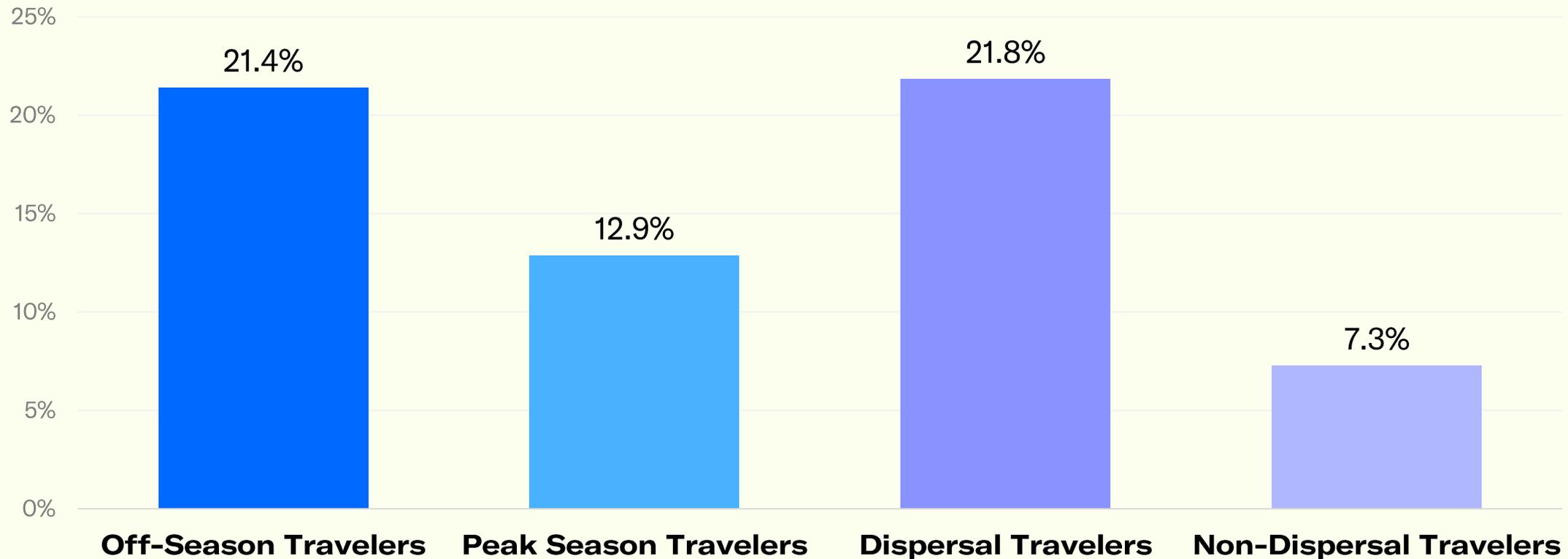
Dispersal and Off-Season Travelers are Much More Adventurous

Question: How adventurous do you consider yourself to be while traveling?
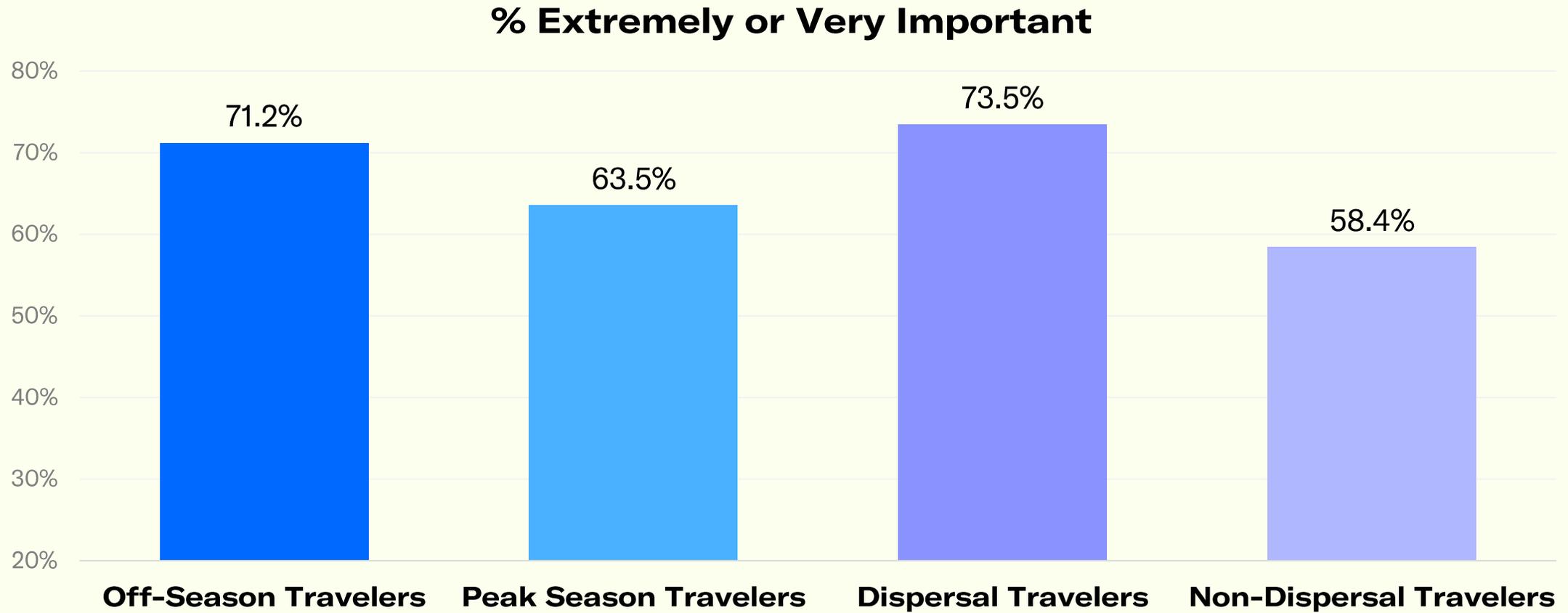
% Extremely Adventurous or Very Adventurous

- Off-Season Travelers: 34.6%
- Peak Season Travelers: 26.5%
- Dispersal Travelers: 40.4%
- Non-Dispersal Travelers: 14.4%
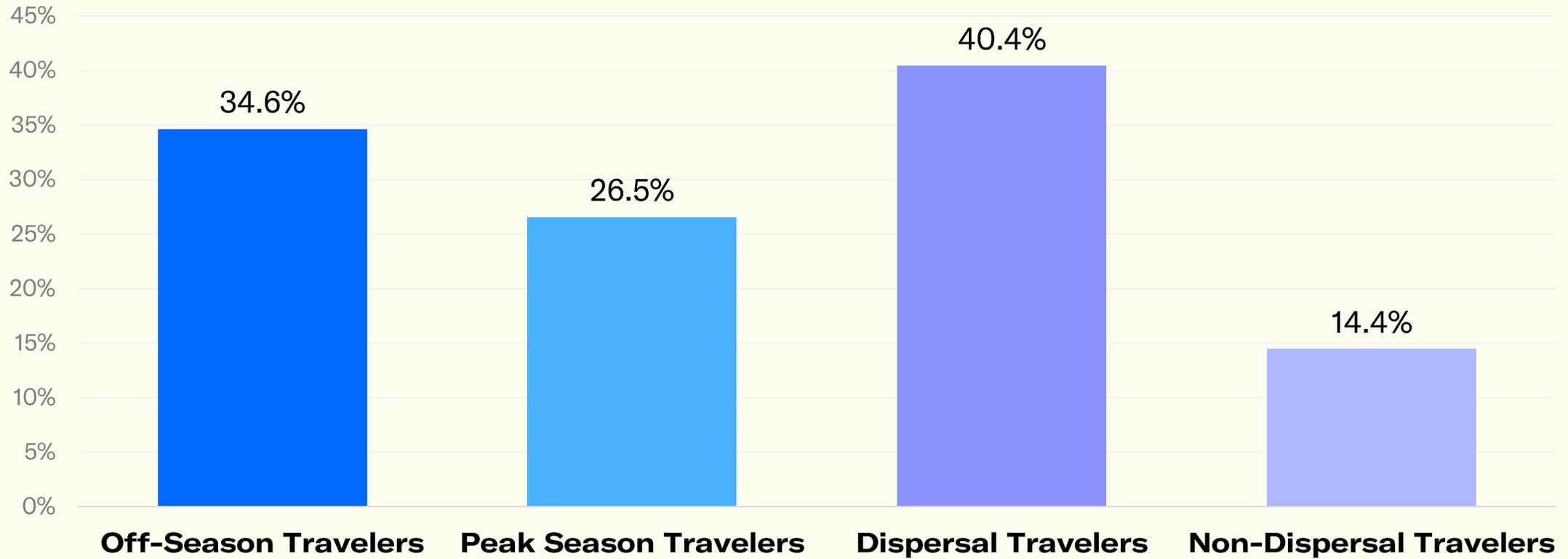
De-stressing, Self-care, and Children's Experiences Drive their Destination Decisions

Question: Please think about WHY YOU TOOK THIS MOST RECENT OVERNIGHT TRIP. Which of the following played a role in your decision to take this trip?
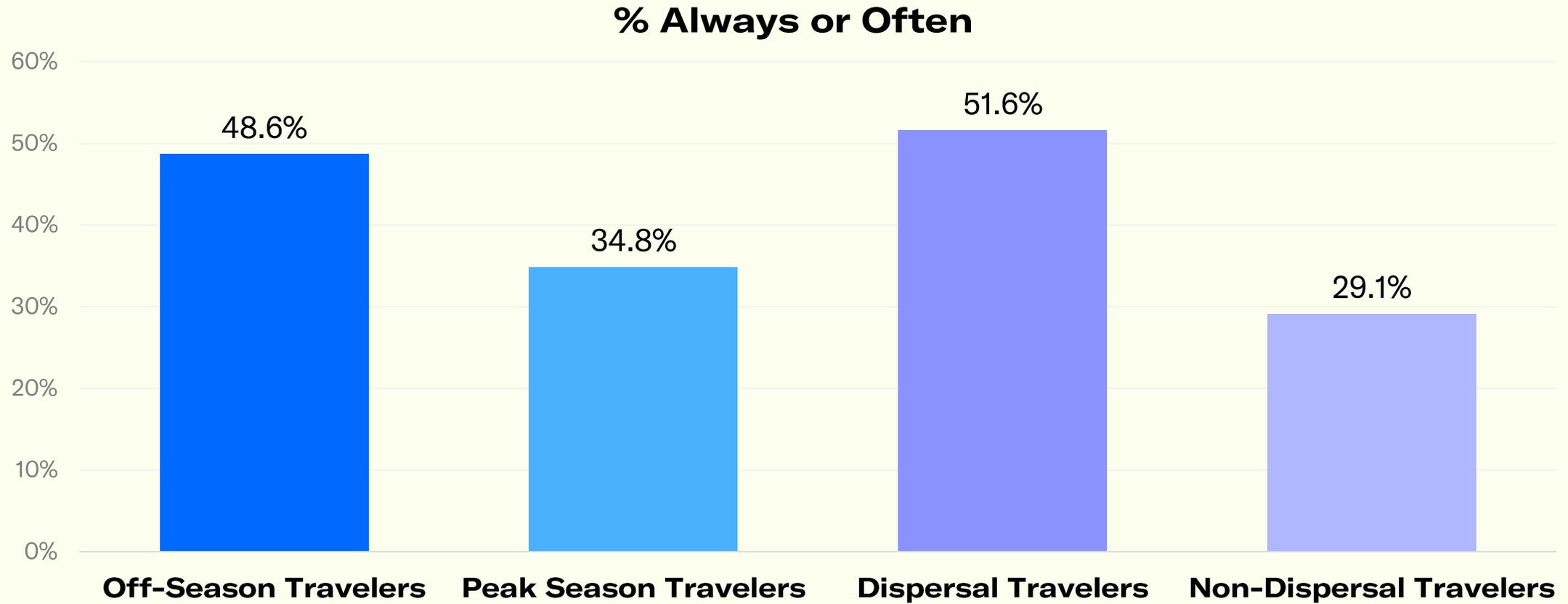

Legend: ■ Off-Season Travelers ■ Peak Season Travelers ■ Dispersal Travelers ■ Non-Dispersal Travelers

Escape the stress of my daily life
- 30.3%
- 24.3%
- 31.4%
- 22.3%

Self-care
- 18.9%
- 13.4%
- 19.3%
- 13.7%

Experiences for my children
- 15.1%
- 10.8%
- 16.3%
- 9.3%
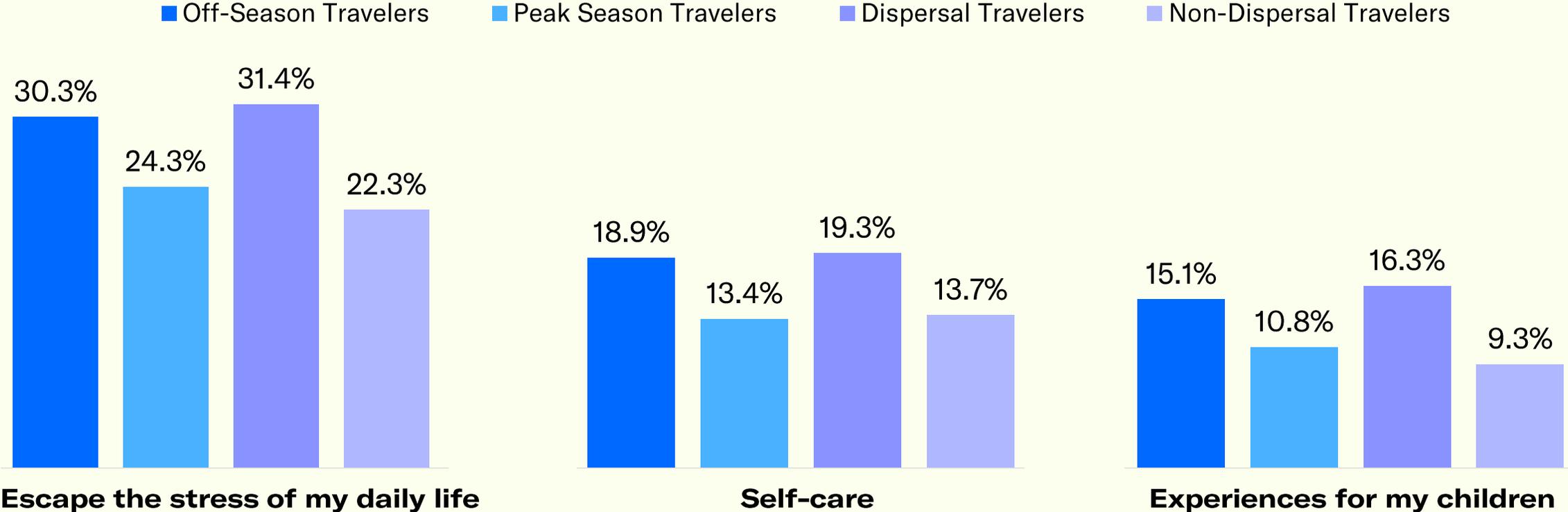
Off-Season and Dispersal Travelers See Travel as Key to Holistic Wellness

Question: Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)

% Extremely or Very Important

Off-Season Travelers	Peak Season Travelers	Dispersal Travelers	Non-Dispersal Travelers
71.2%	63.5%	73.5%	58.4%

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More Than Half of Dispersal Travelers Regularly Plan Leisure Trips Around Supporting their Well-Being

Question: How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?

% Always or Often

Off-Season Travelers	Peak Season Travelers	Dispersal Travelers	Non-Dispersal Travelers
48.6%	34.8%	51.6%	29.1%

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Dispersal Travelers are Most Likely to Cite the Cost of Airfare as a Travel Barrier

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)
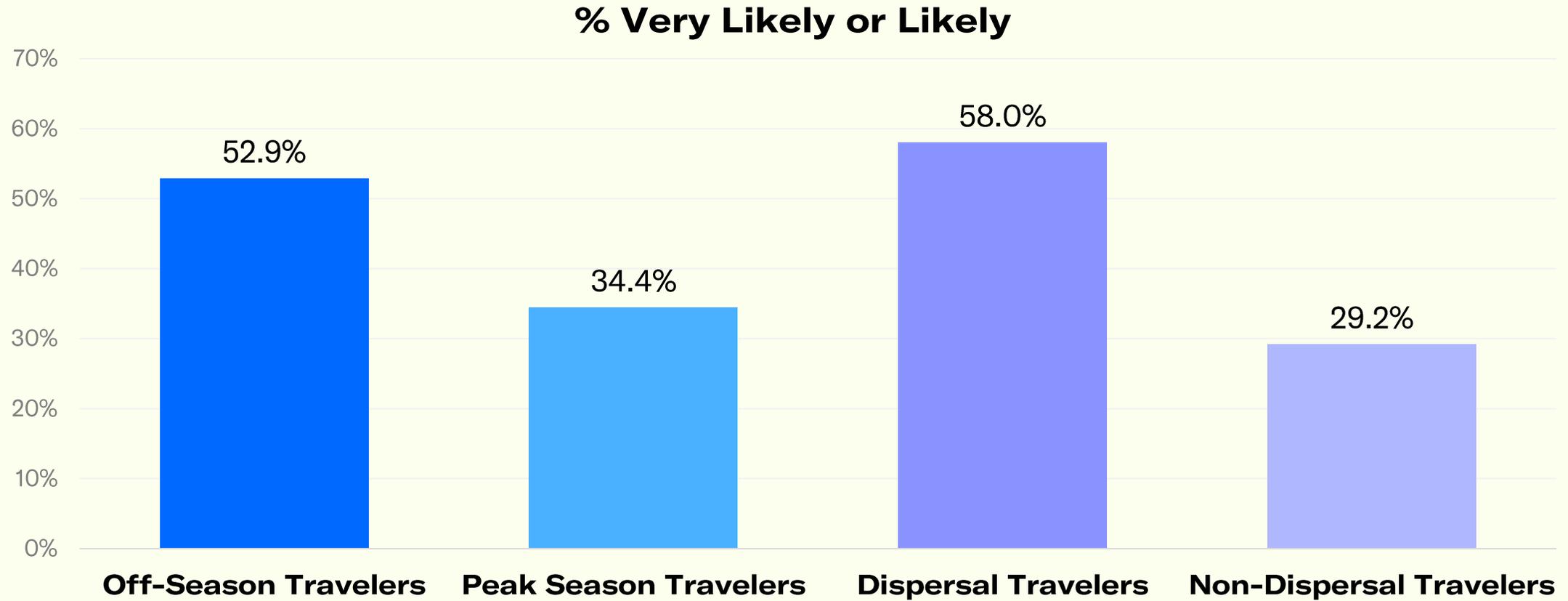
% Airfare is Too Expensive

	Off-Season Travelers	Peak Season Travelers	Dispersal Travelers	Non-Dispersal Travelers
	27.3%	24.3%	29.6%	23.0%

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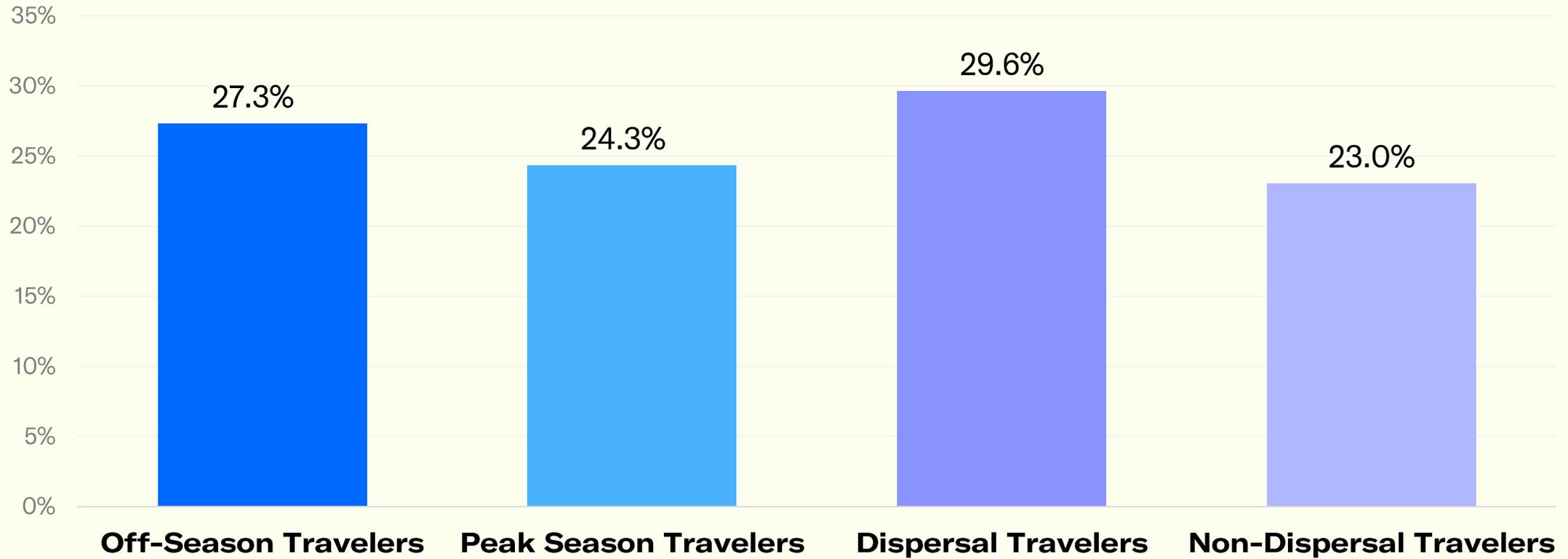
Off-Season Travelers were Most Likely to Report Crowding as a Travel Barrier

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)
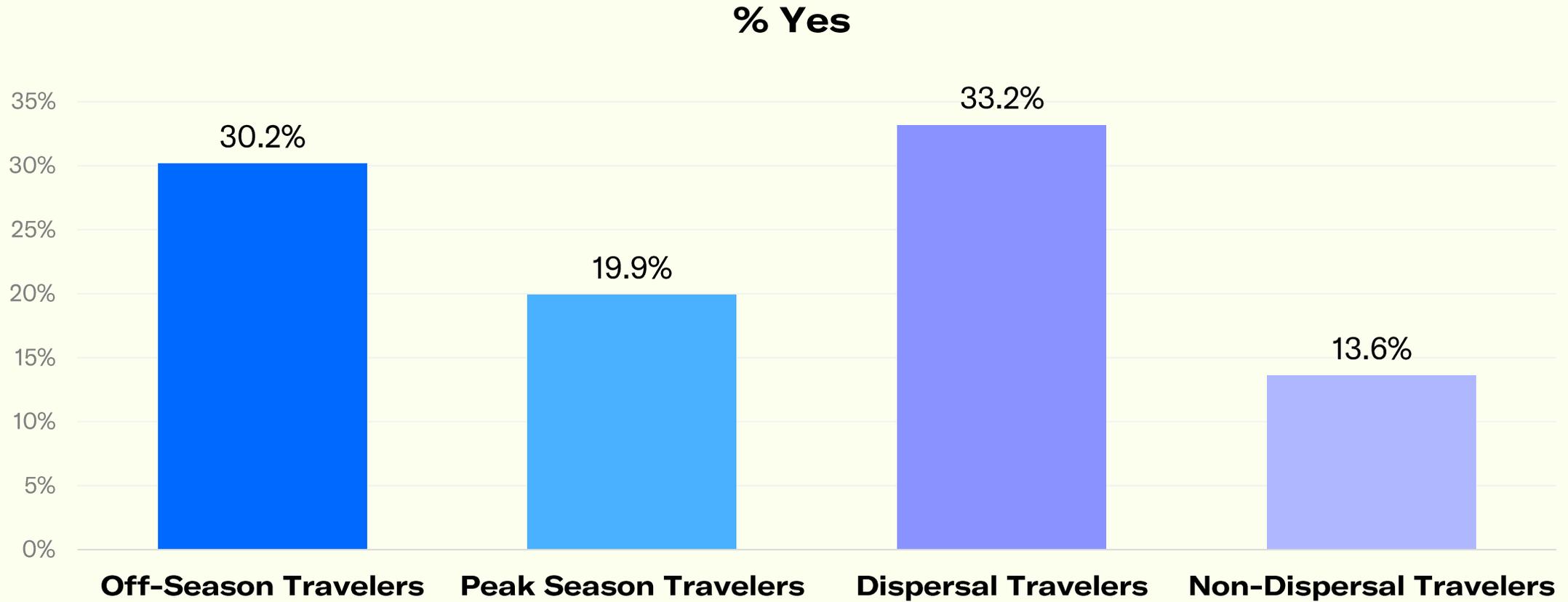
% Crowds / Too Many People

Off-Season Travelers	14.2%
Peak Season Travelers	7.6%
Dispersal Travelers	13.8%
Non-Dispersal Travelers	10.7%

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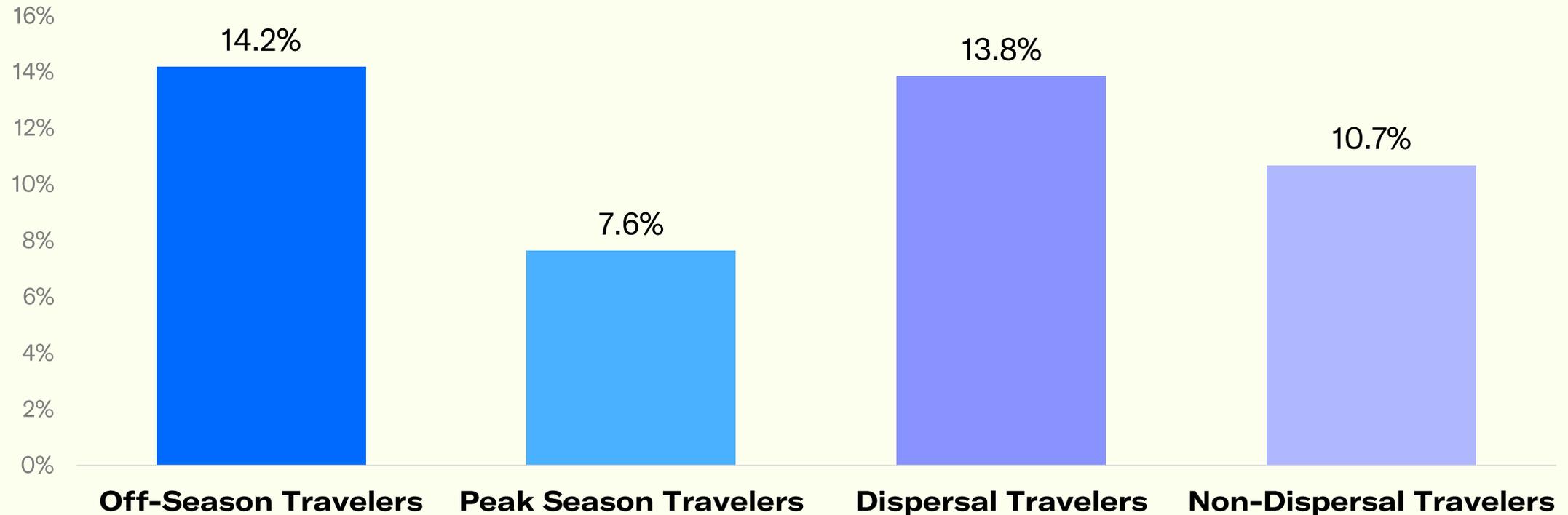
Dispersal and Off-Season Travelers are Looking at International Travel at a Much Higher Rate

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

% Very Likely or Likely

Off-Season Travelers	52.9%
Peak Season Travelers	34.4%
Dispersal Travelers	58.0%
Non-Dispersal Travelers	29.2%

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(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

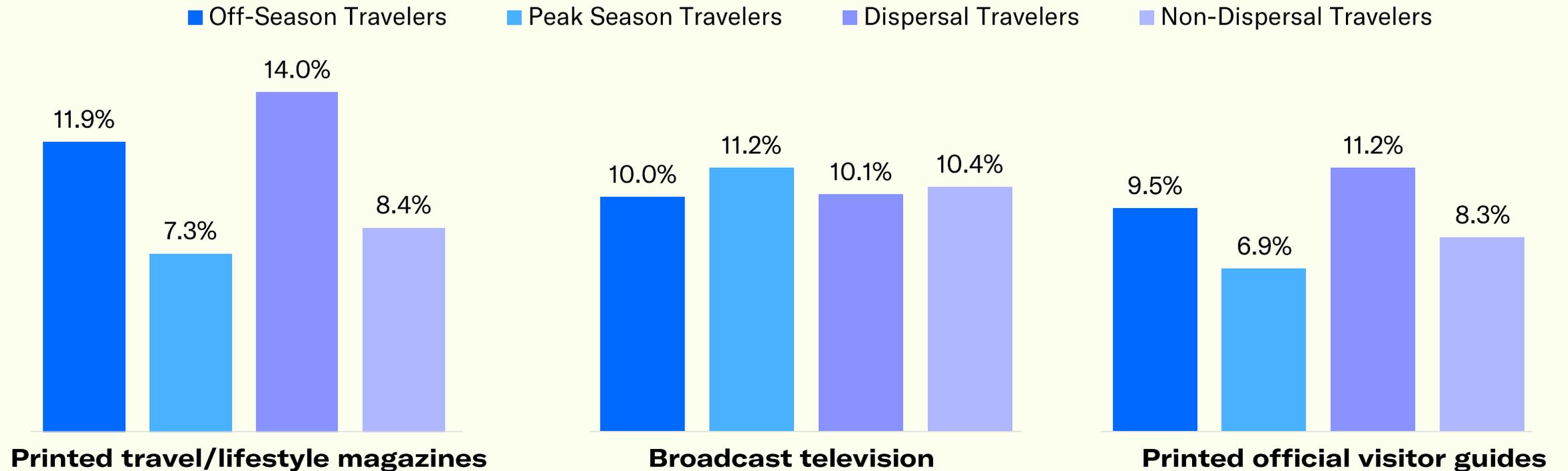# Usage of AI Tools for Trip Planning is Higher among Dispersal and Off-Season Travelers

Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?

% Yes

Off-Season Travelers	Peak Season Travelers	Dispersal Travelers	Non-Dispersal Travelers
30.2%	19.9%	33.2%	13.6%

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Off-Season and Dispersal Travelers are More Likely to be Receptive to Travel Ads in Print Magazines and Visitor Guides

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)

Key Traditional Channels

- ■ Off-Season Travelers
- ■ Peak Season Travelers
- ■ Dispersal Travelers
- ■ Non-Dispersal Travelers

Printed travel/lifestyle magazines
- 11.9%
- 7.3%
- 14.0%
- 8.4%

Broadcast television
- 10.0%
- 11.2%
- 10.1%
- 10.4%

Printed official visitor guides
- 9.5%
- 6.9%
- 11.2%
- 8.3%

(Base: All respondents, 8,083 completed surveys. Data collected January and February 2026.)

In Summary

Demand is strong but the competition for it has never been fiercer. Trip volume and budgets are at post-pandemic highs, yet nearly half of American travelers are also likely to travel internationally this year. Domestic destinations are competing not just with each other, but with Italy, Japan, and the greater world. Financial caution makes travelers more deliberate

Destinations compete on identity, not simply experiences. Travelers choose places that let them be the version of themselves they want to be on vacation. Lead with who your visitor becomes when they're there, not just what they can see and do.

Generation is amongst the greatest predictors of where travelers want to go. Gen Z gravitates toward New York at nearly double any other generation. Millennials over-index for Las Vegas. Gen X for Orlando. Boomers for history and depth. Knowing which generation you're targeting isn't just a media decision, it's a destination positioning decision.

High-value Off–Season and Dispersal travelers are actively looking for somewhere worth discovering that supports their wellness. Off-season and dispersal travelers earn $27,000–$31,000 more per household than their counterparts and they are explicitly seeking destinations that feel different, authentic, and restorative. Lean into what makes you fascinating and emotionally rejuvenating.

AI discoverability is critical. Over a quarter of American travelers have already used AI to plan trips and that number skews heavily toward the most valuable segments.

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The State of the American Traveler

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