

The State of the American Traveler



April Edition

Opportunity powered by *Insight*

Future Partners

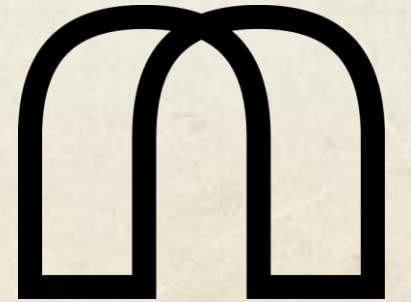
Methodology

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [February 17 – March 2](#)
- 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

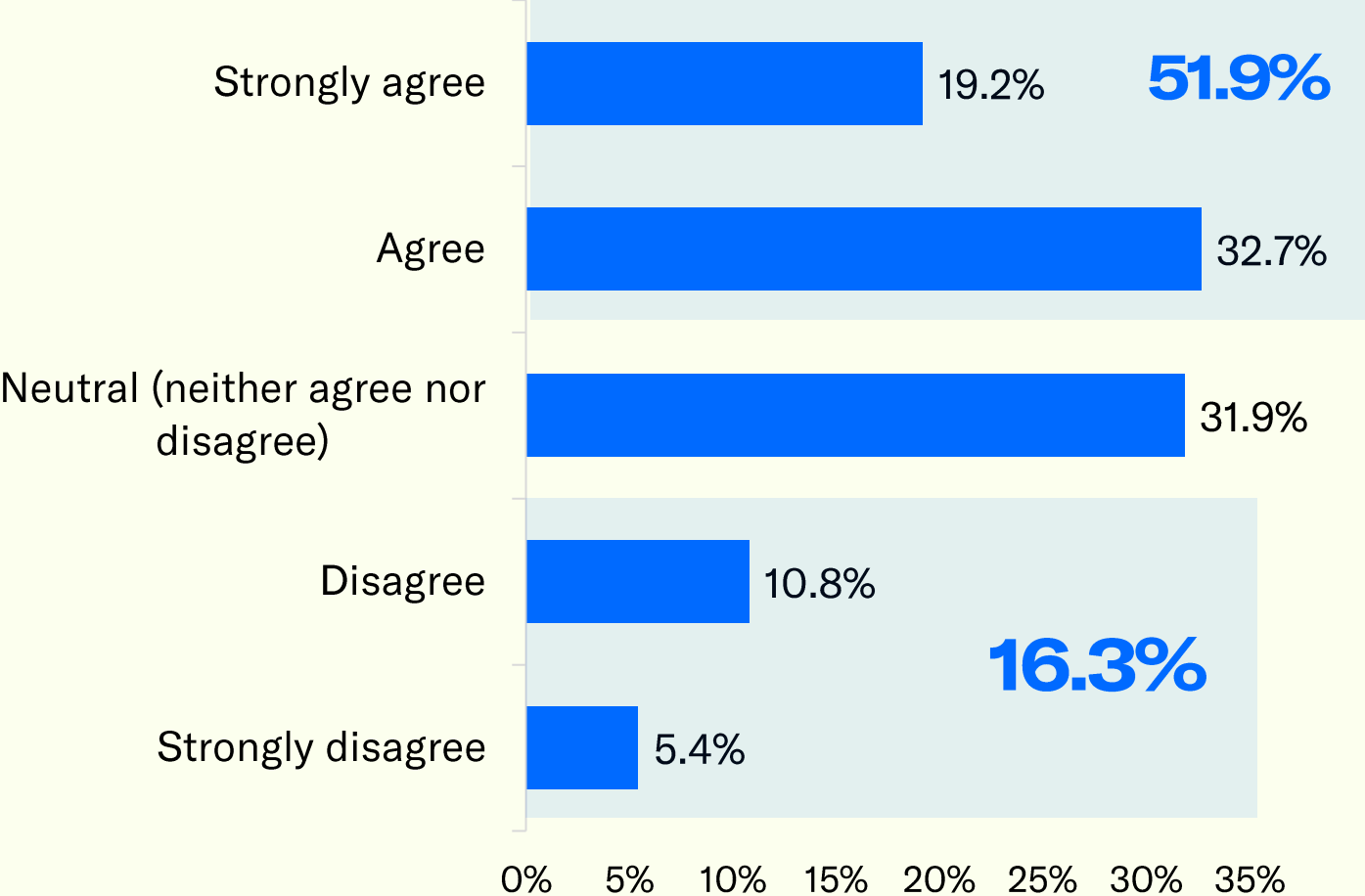


How are Americans Feeling About the Economy?



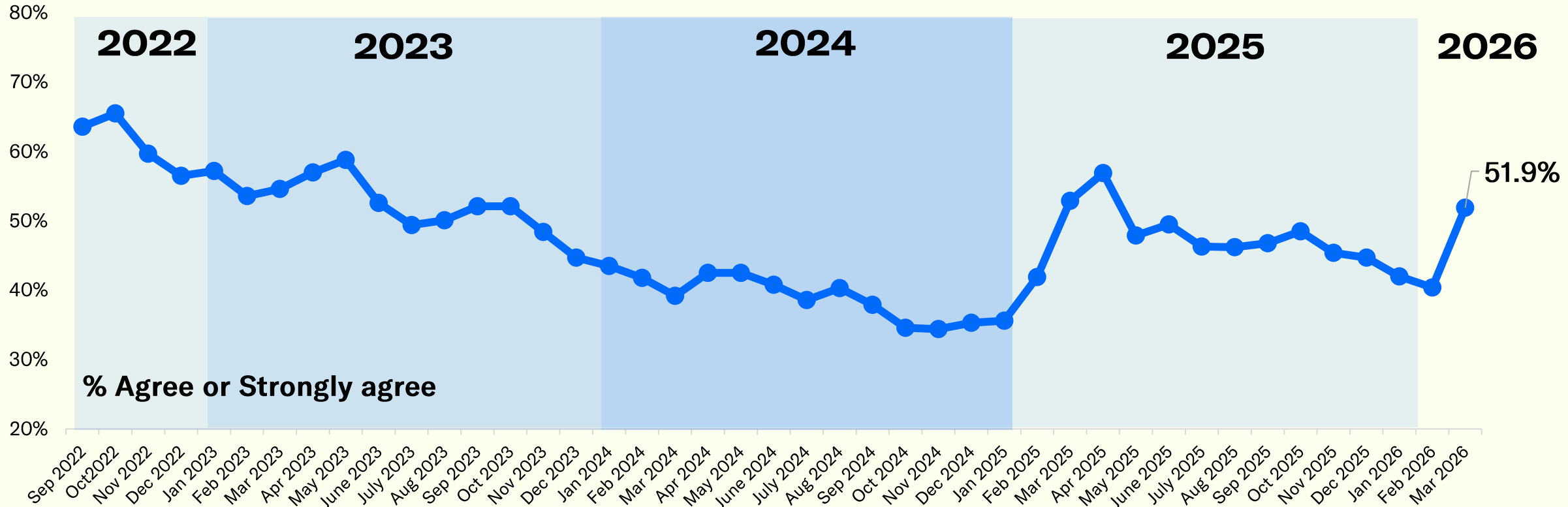
Recession Fears Grow Significantly

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



Recession Fears Grow Significantly

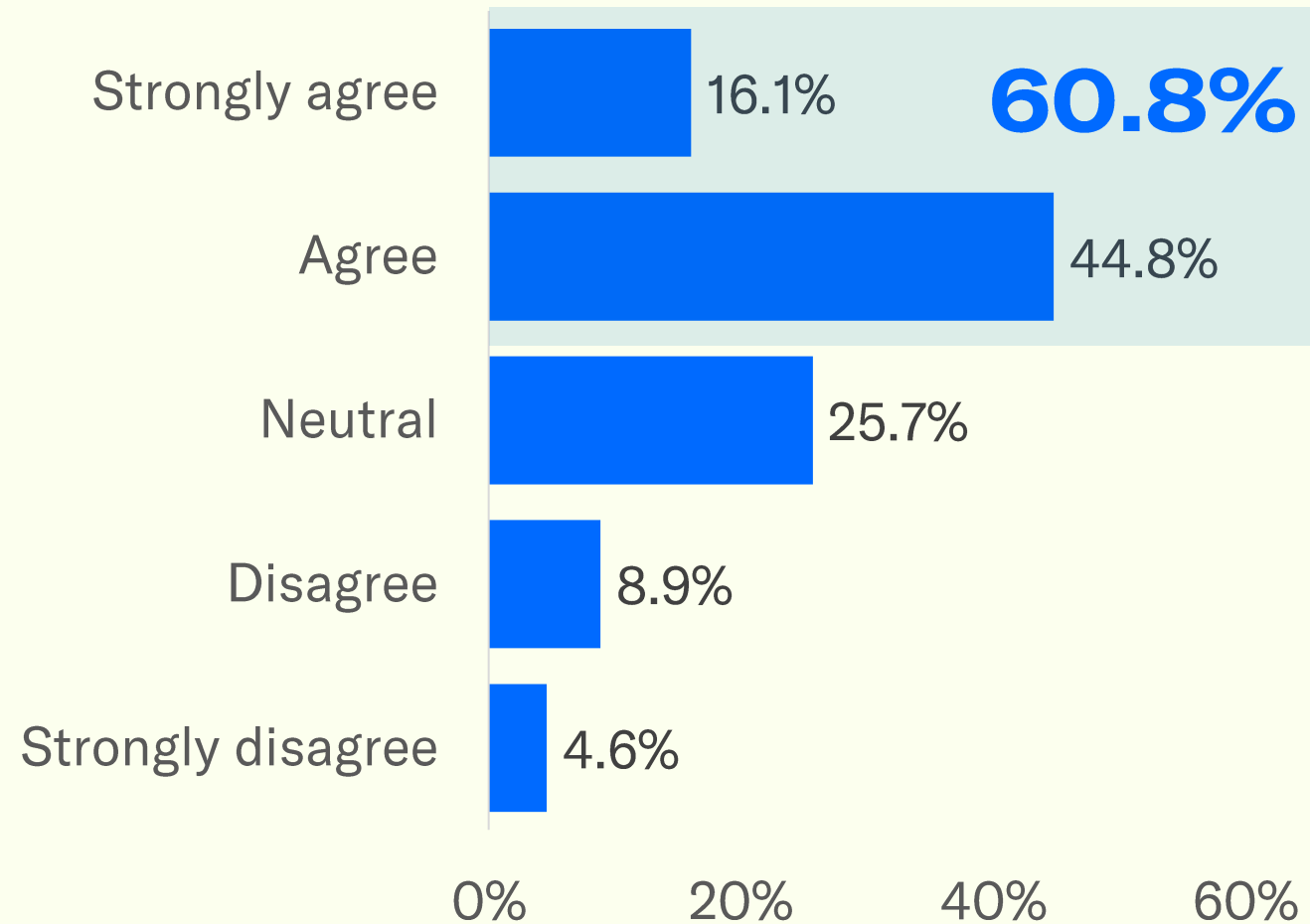
Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Still Though, Most Americans Agree That Travel is a Worthwhile Investment

Question:

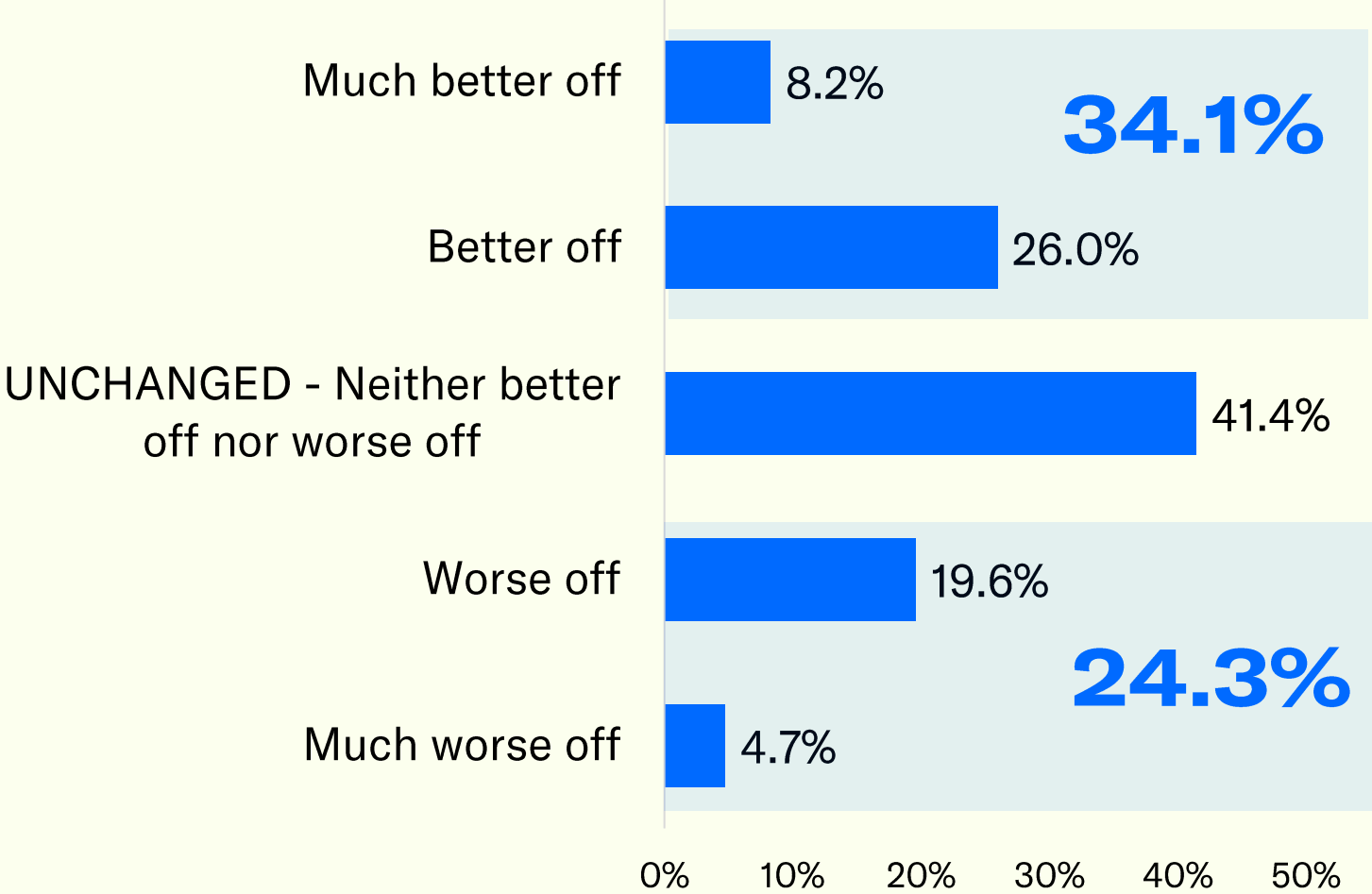
Even in an economic recession, I'd consider travel to be a worthwhile investment.



Despite Recession Concerns, Household Finances Show Continued Stability

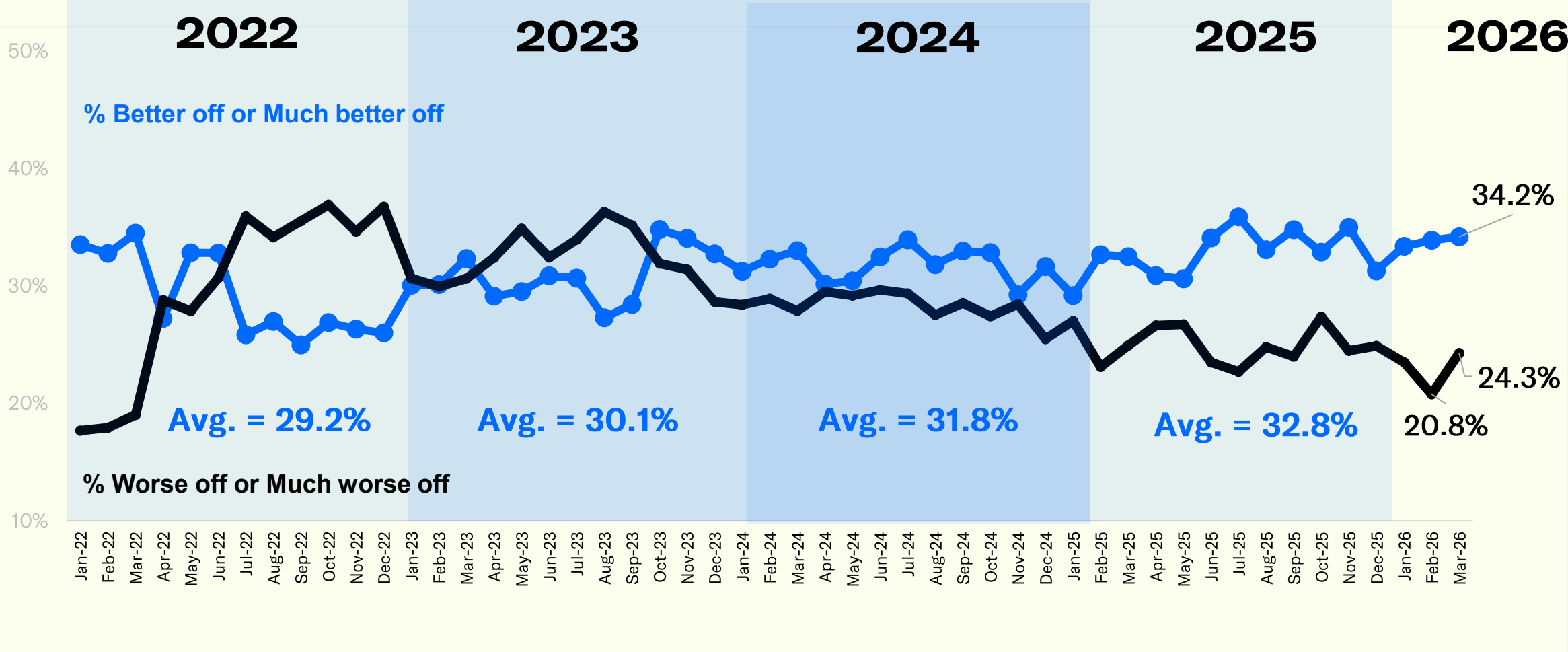
Question:

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



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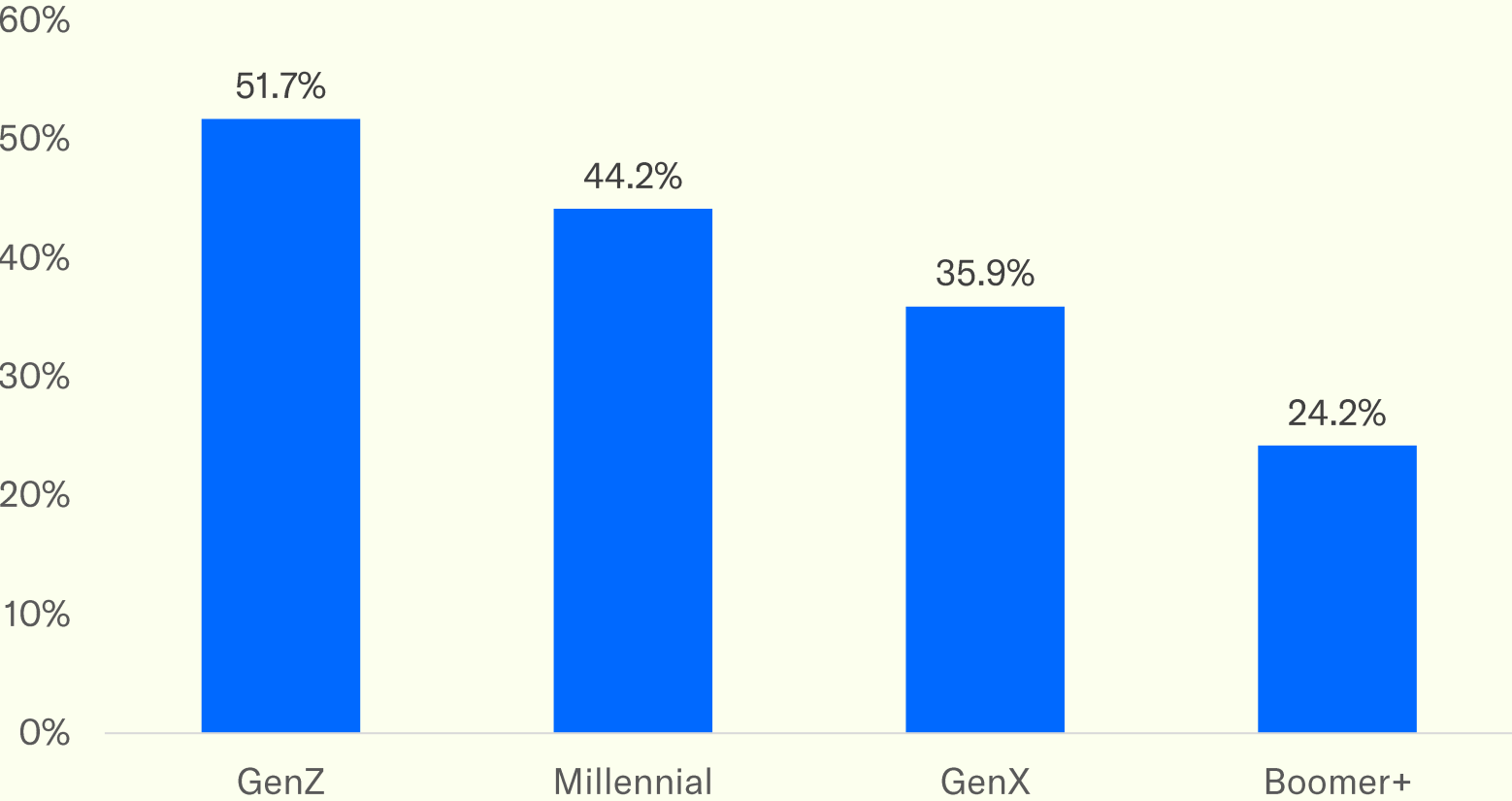


Household Finances **By Generation**

Question:

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

% Better or Much Better Off

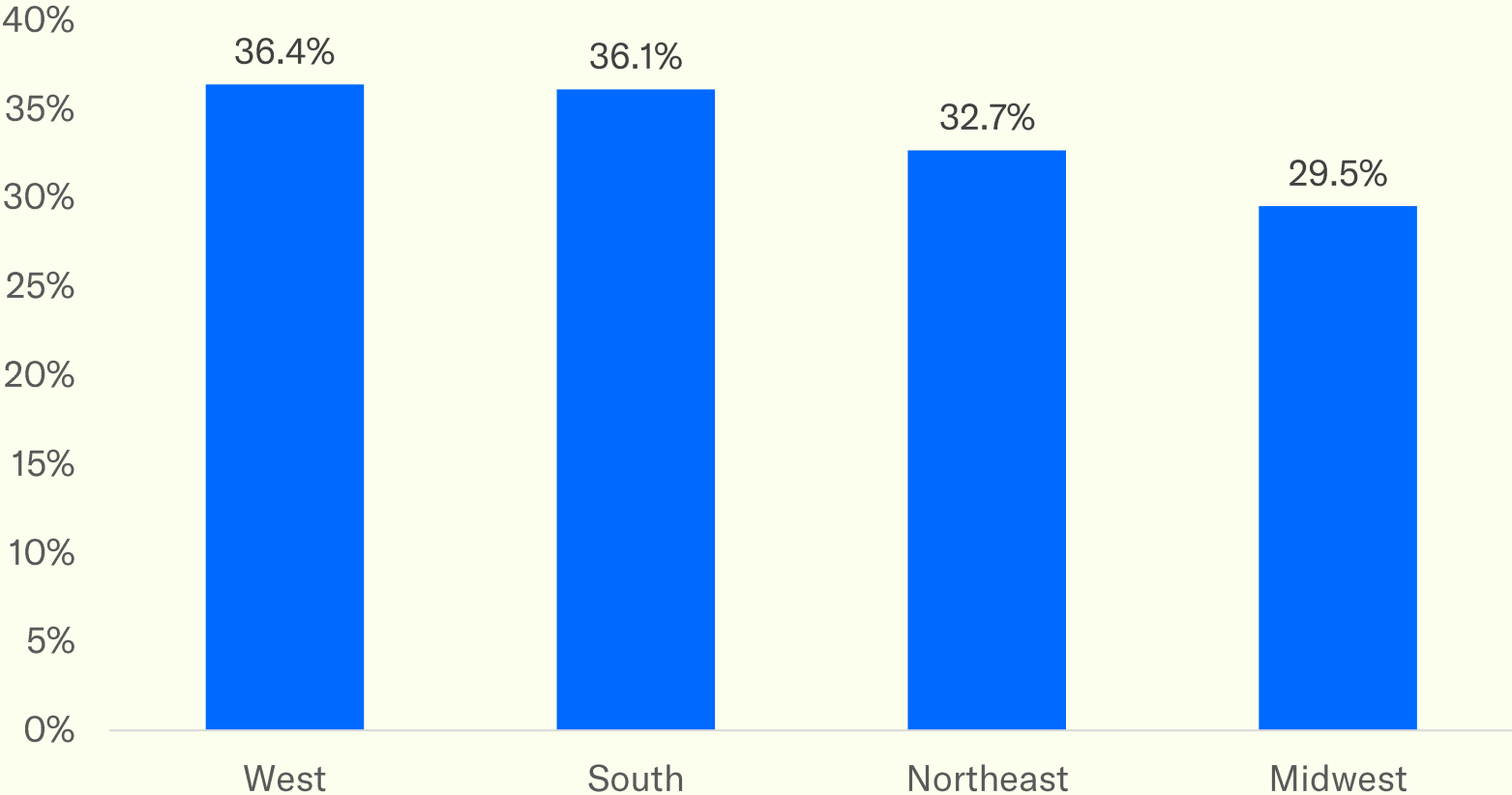


Household Finances **By Region**

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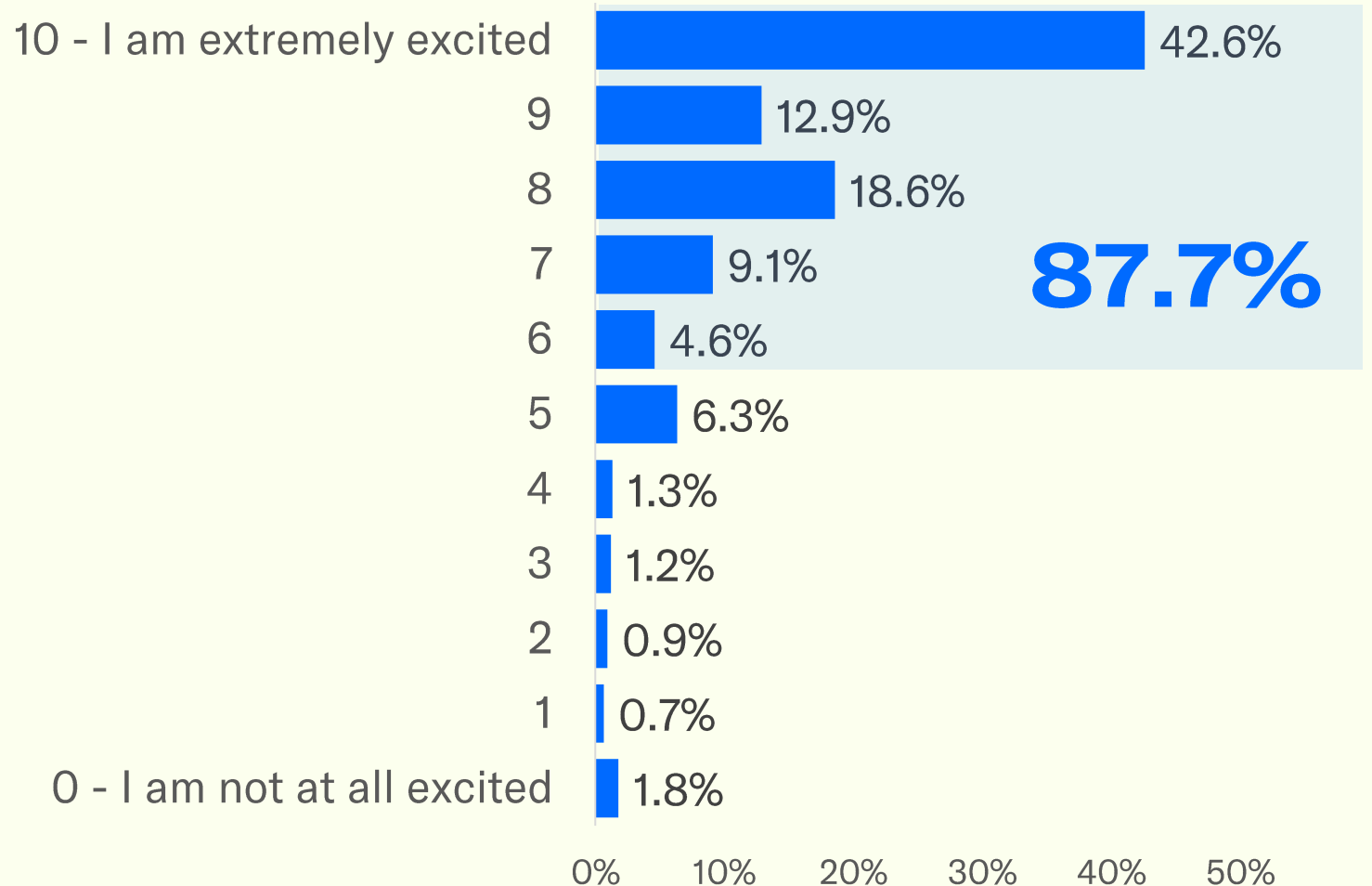
Americans' Current Travel Sentiment



Excitement for Leisure Travel Edges Down

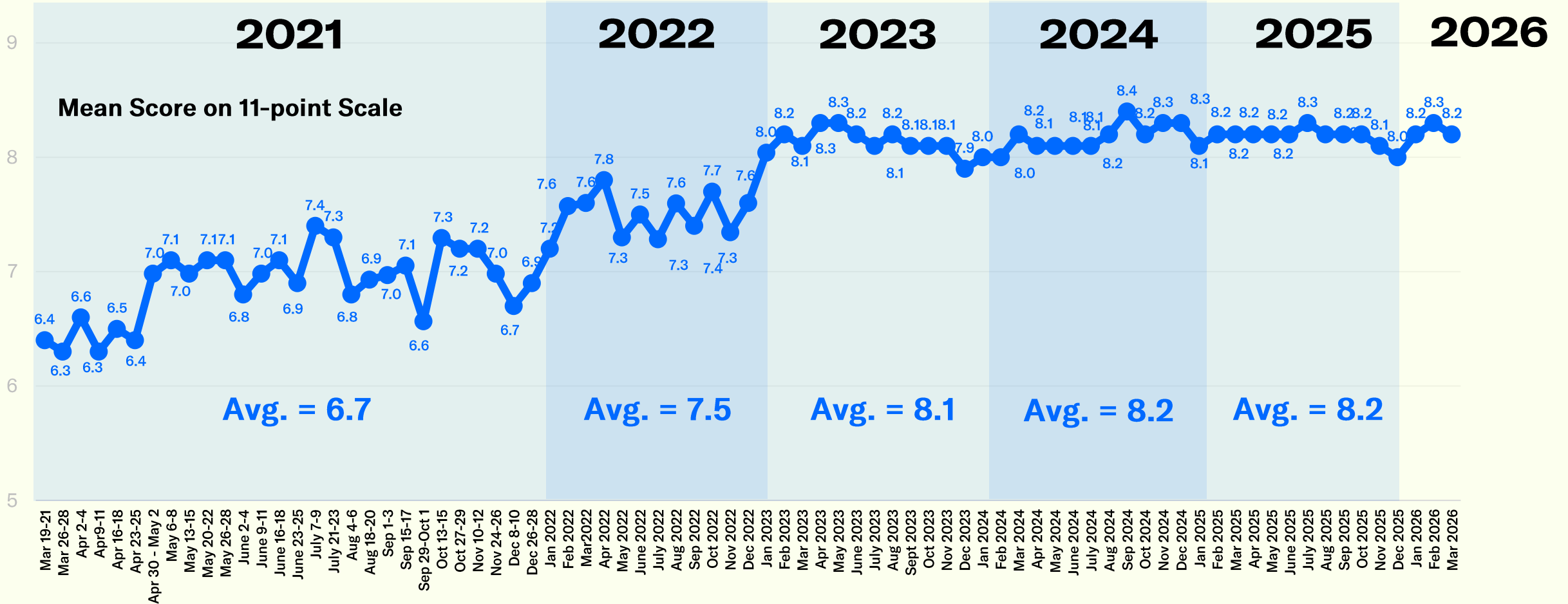
Question:

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



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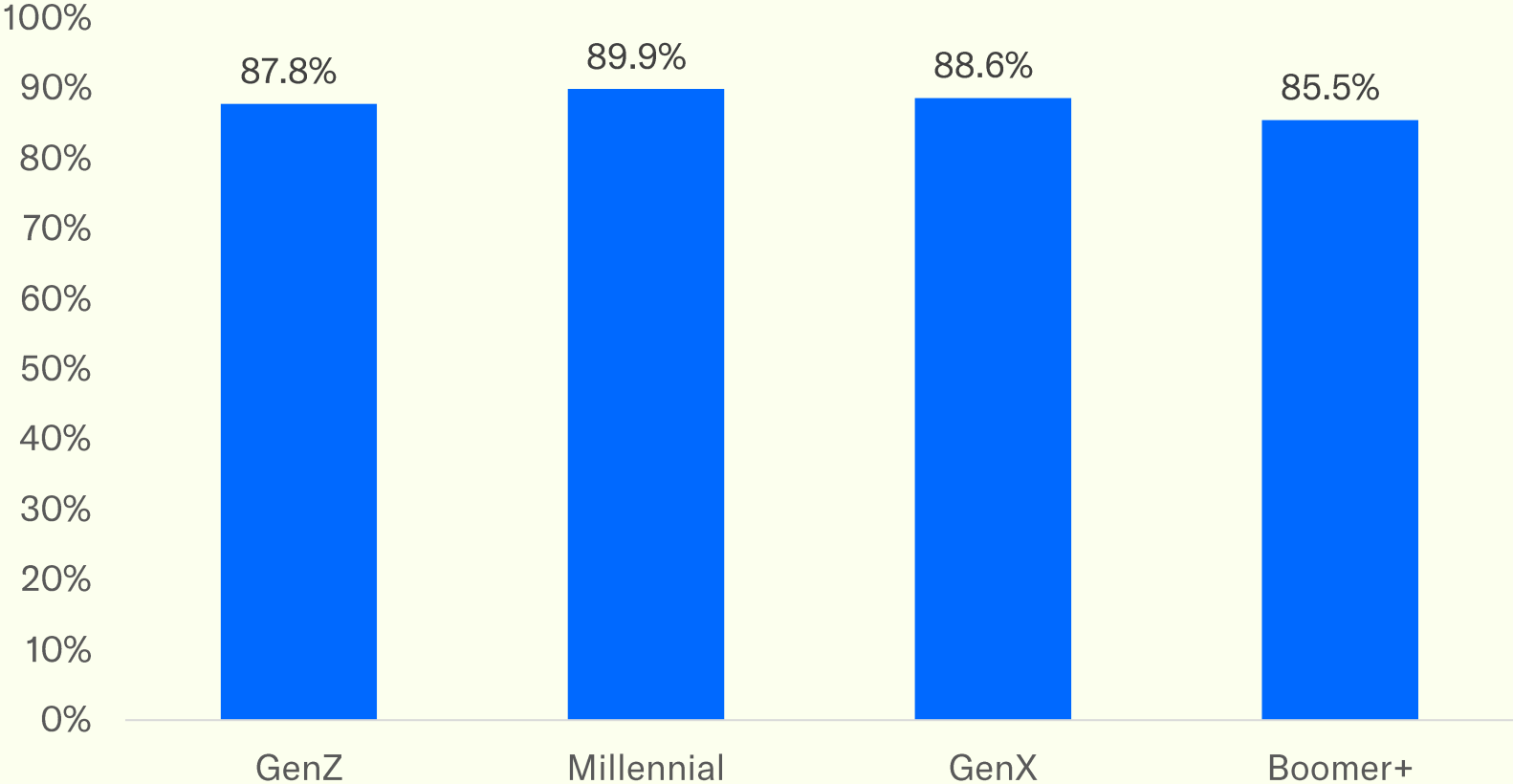


Excitement for Leisure Travel **By Generation**

6-10 on 11-Pt Excitement Scale

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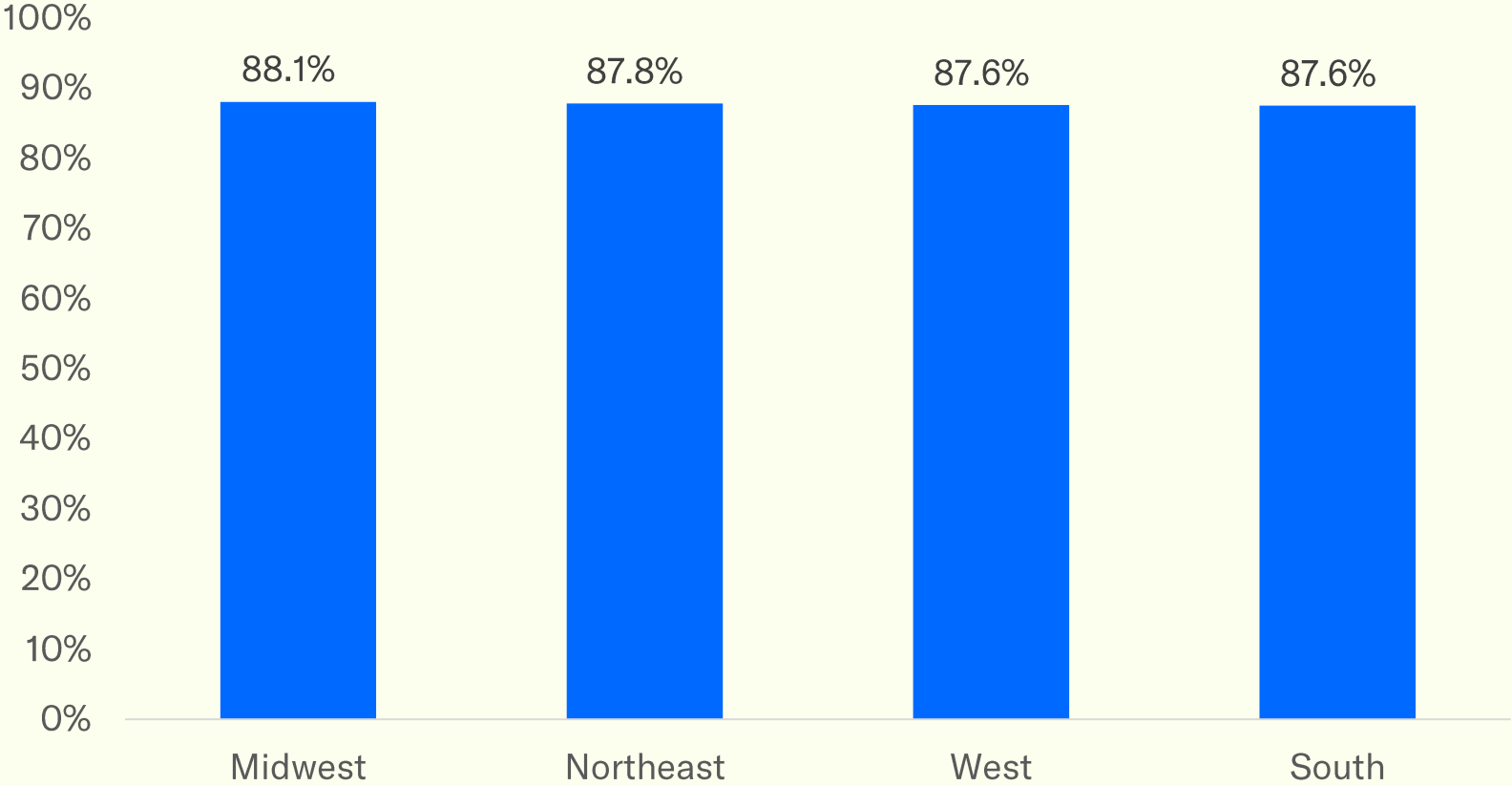


Excitement for Leisure Travel **By Region**

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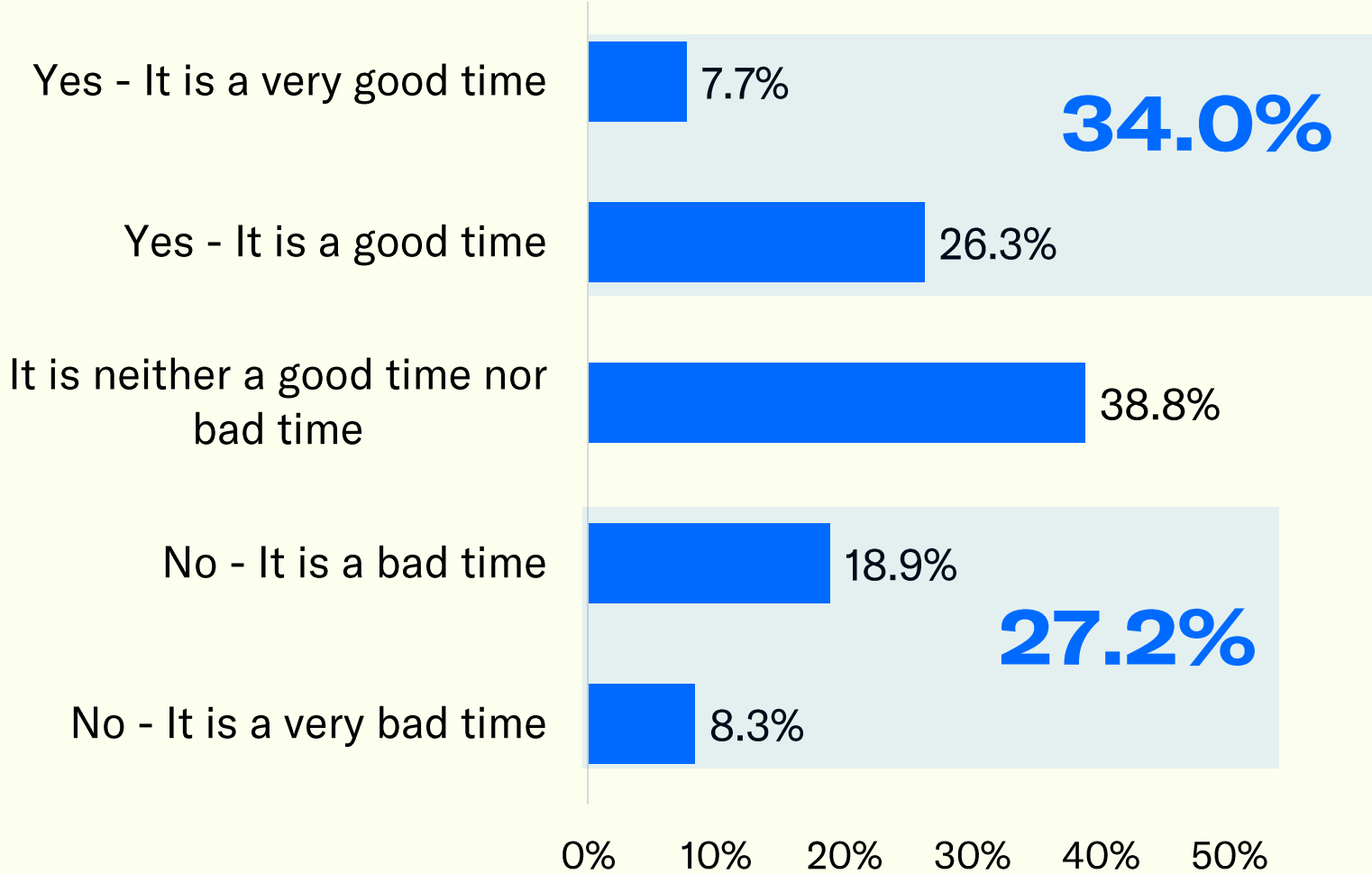
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More Travelers See Now as a Good Time to Spend Than a Bad One

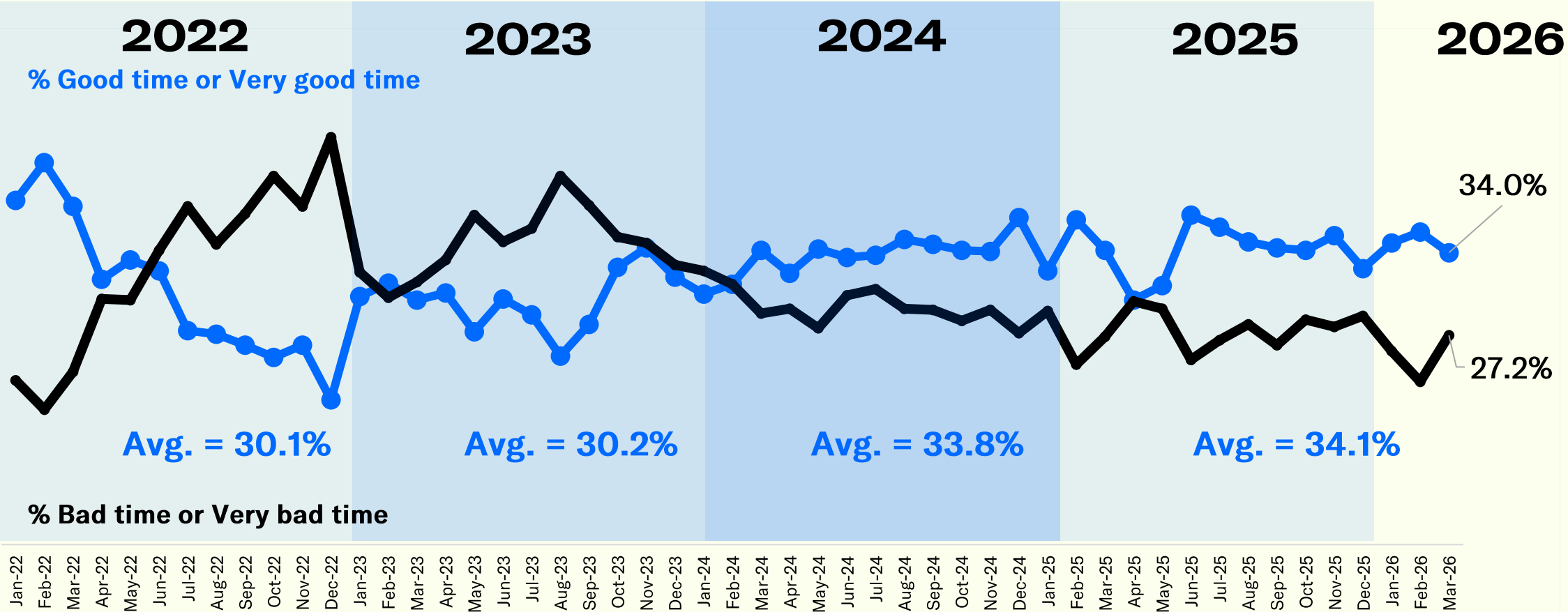
Question:

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?



More Travelers See Now as a Good Time to Spend Than a Bad One

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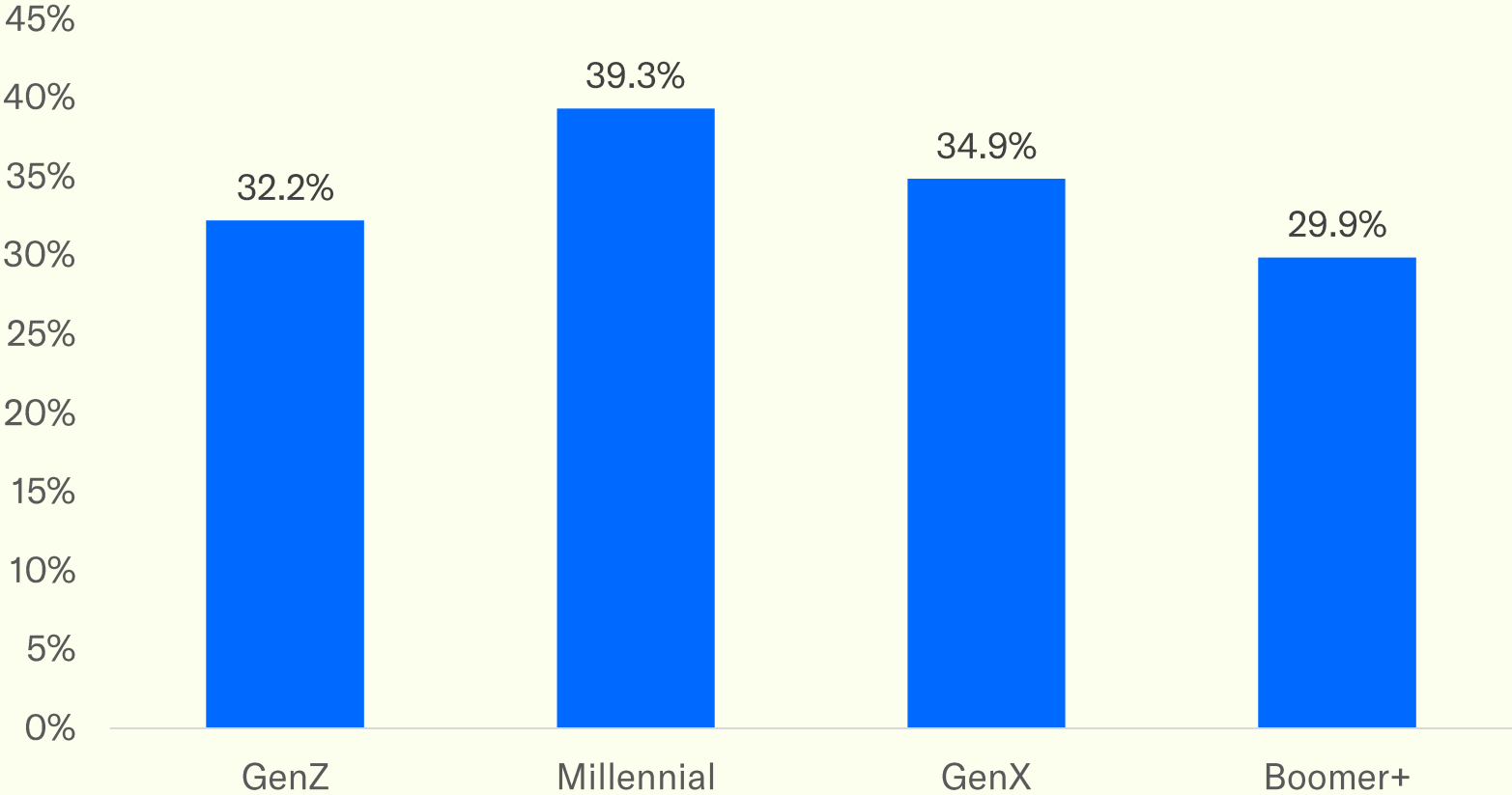
Now as a Good Time to Spend on Travel

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% Yes, It is a Good or Very Good Time



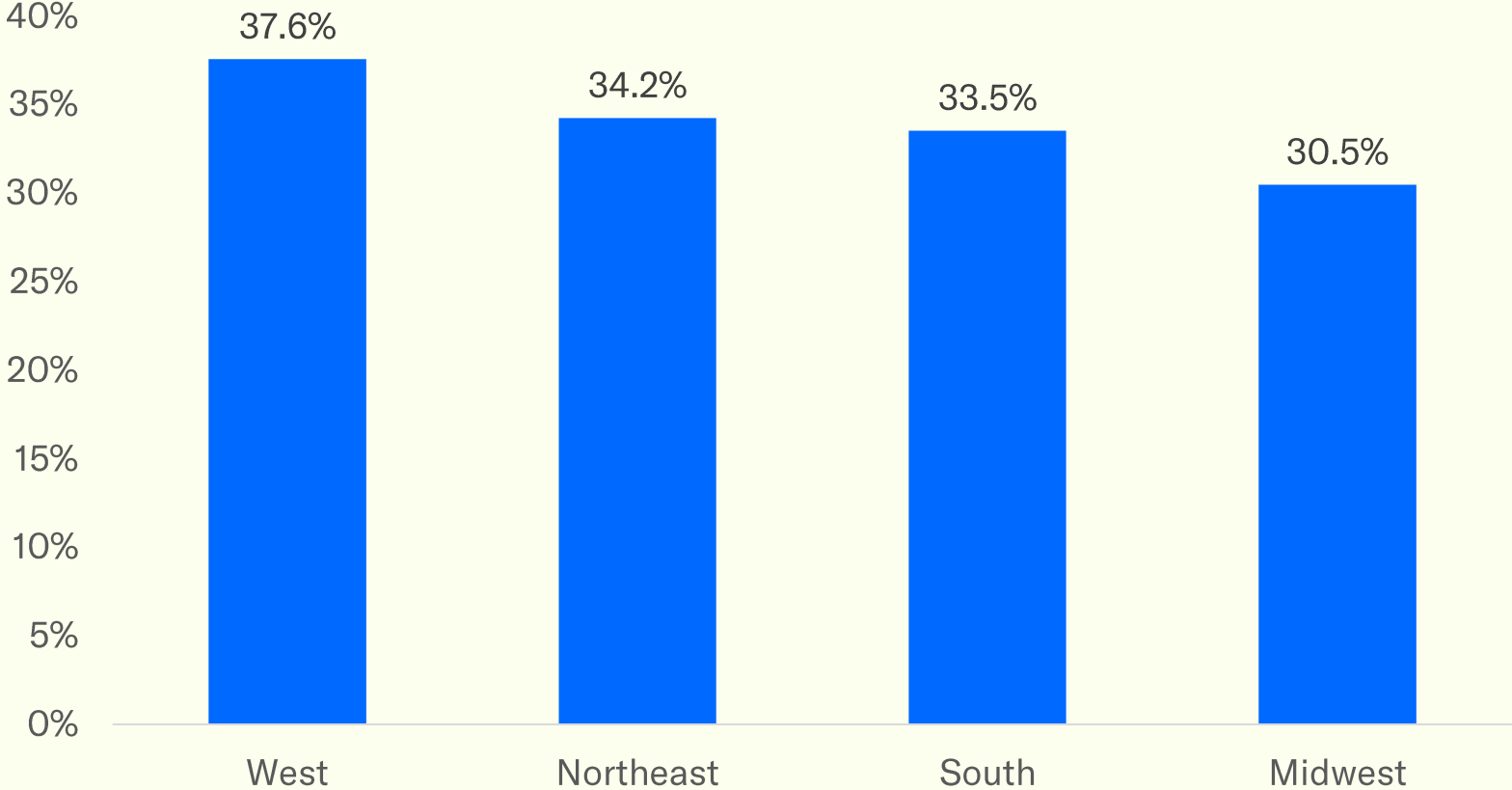
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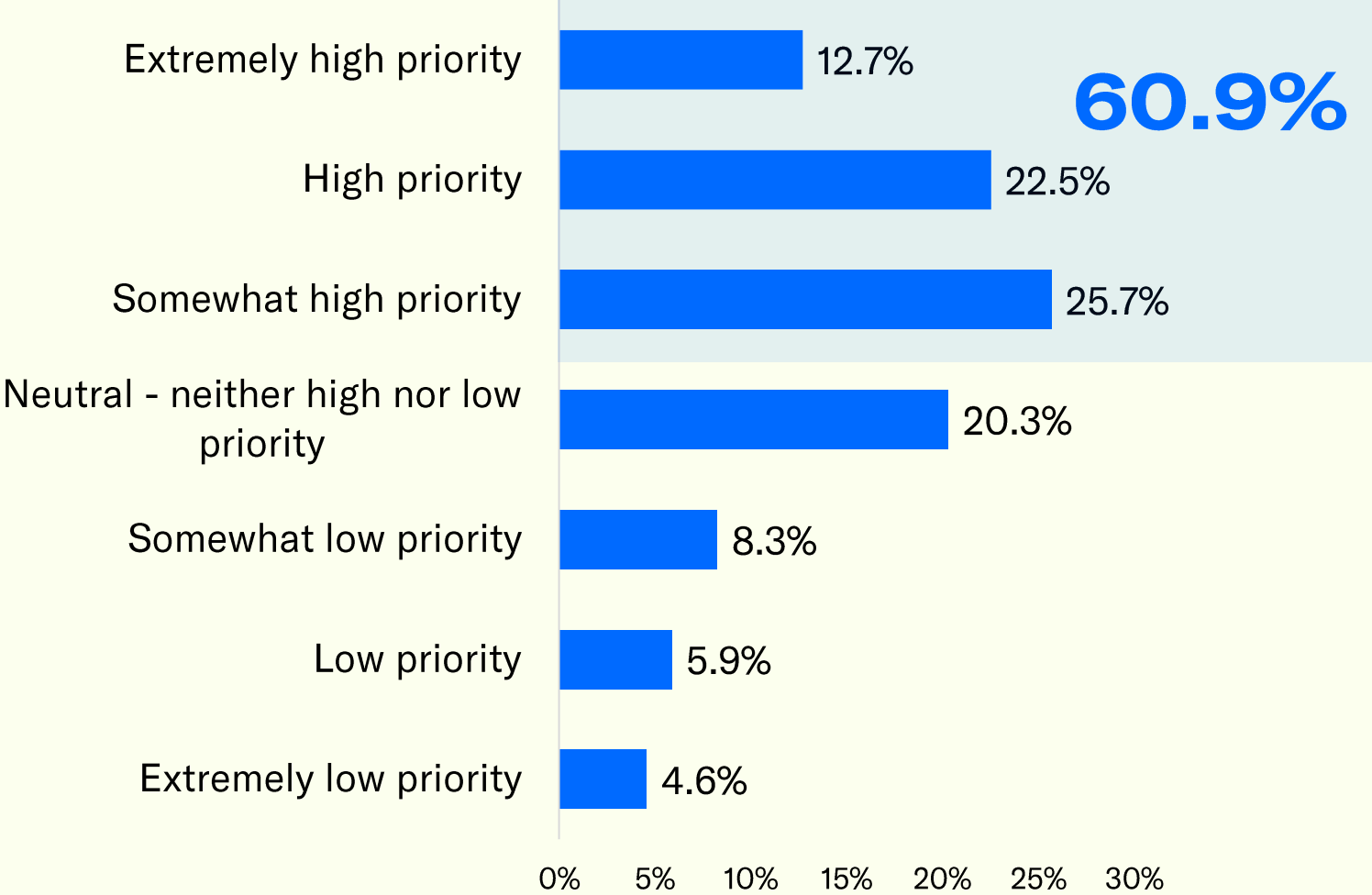
Travel Still Claims a Top Spot Among Consumer Priorities

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.

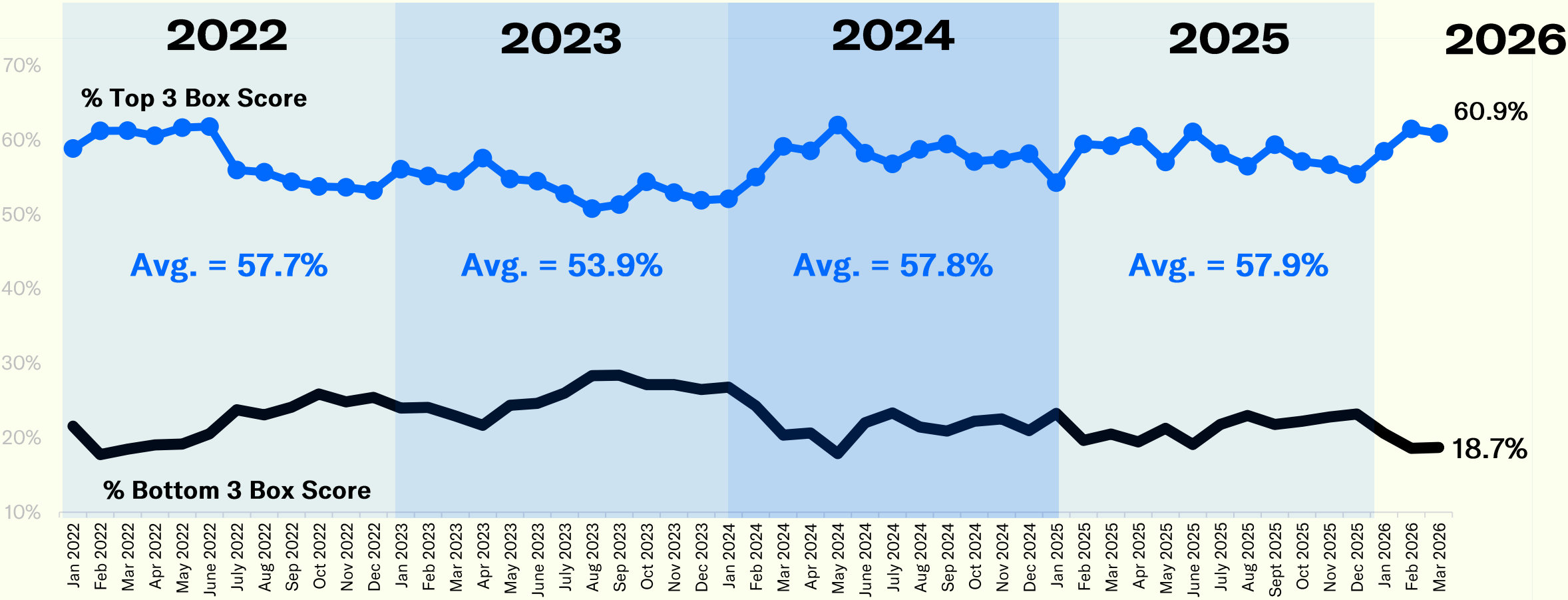
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Travel as a Budget Priority

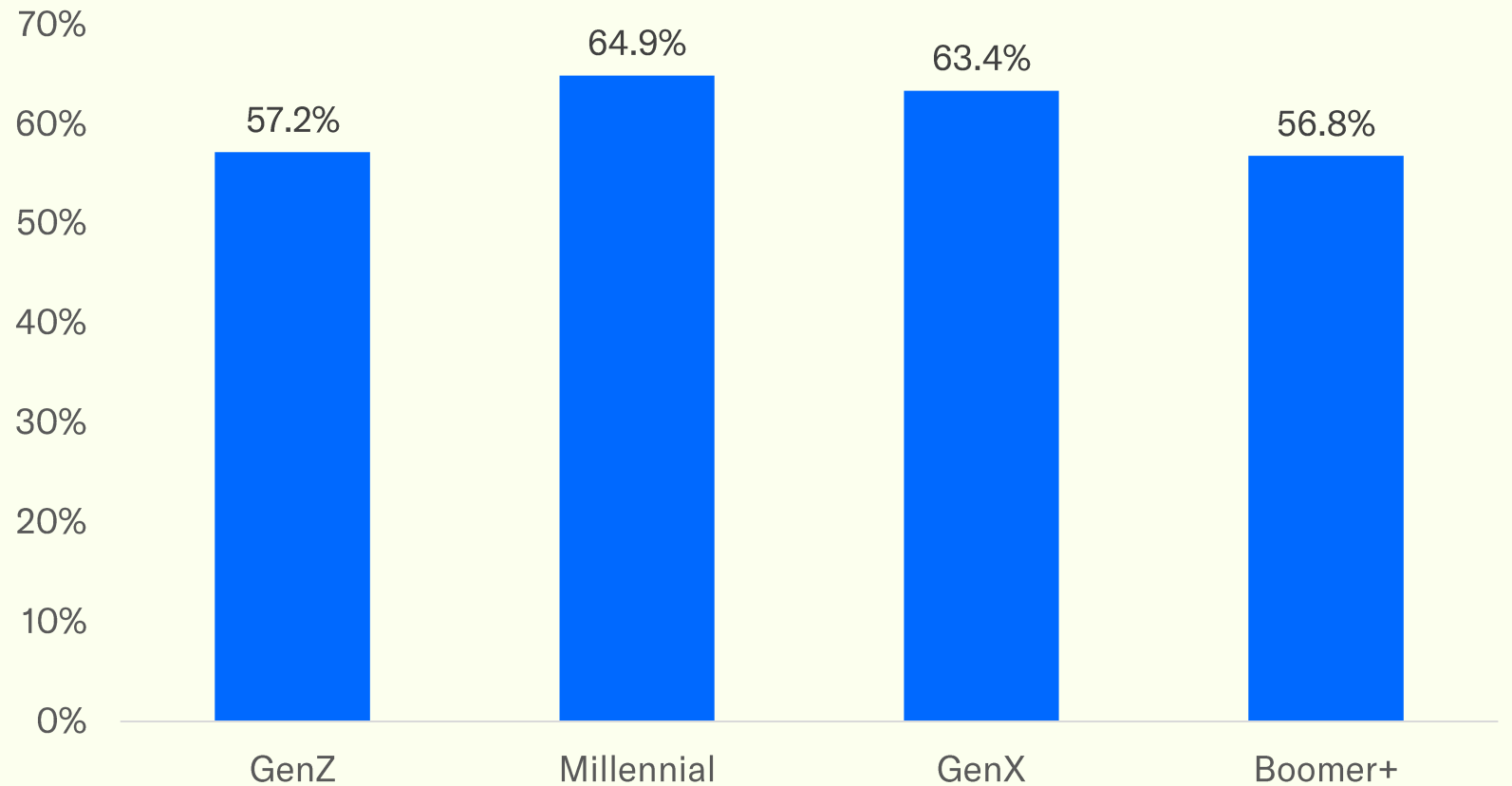
By Generation

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)
_____.

% Somewhat, High, or Extremely High Priority



Travel as a Budget Priority

By Region

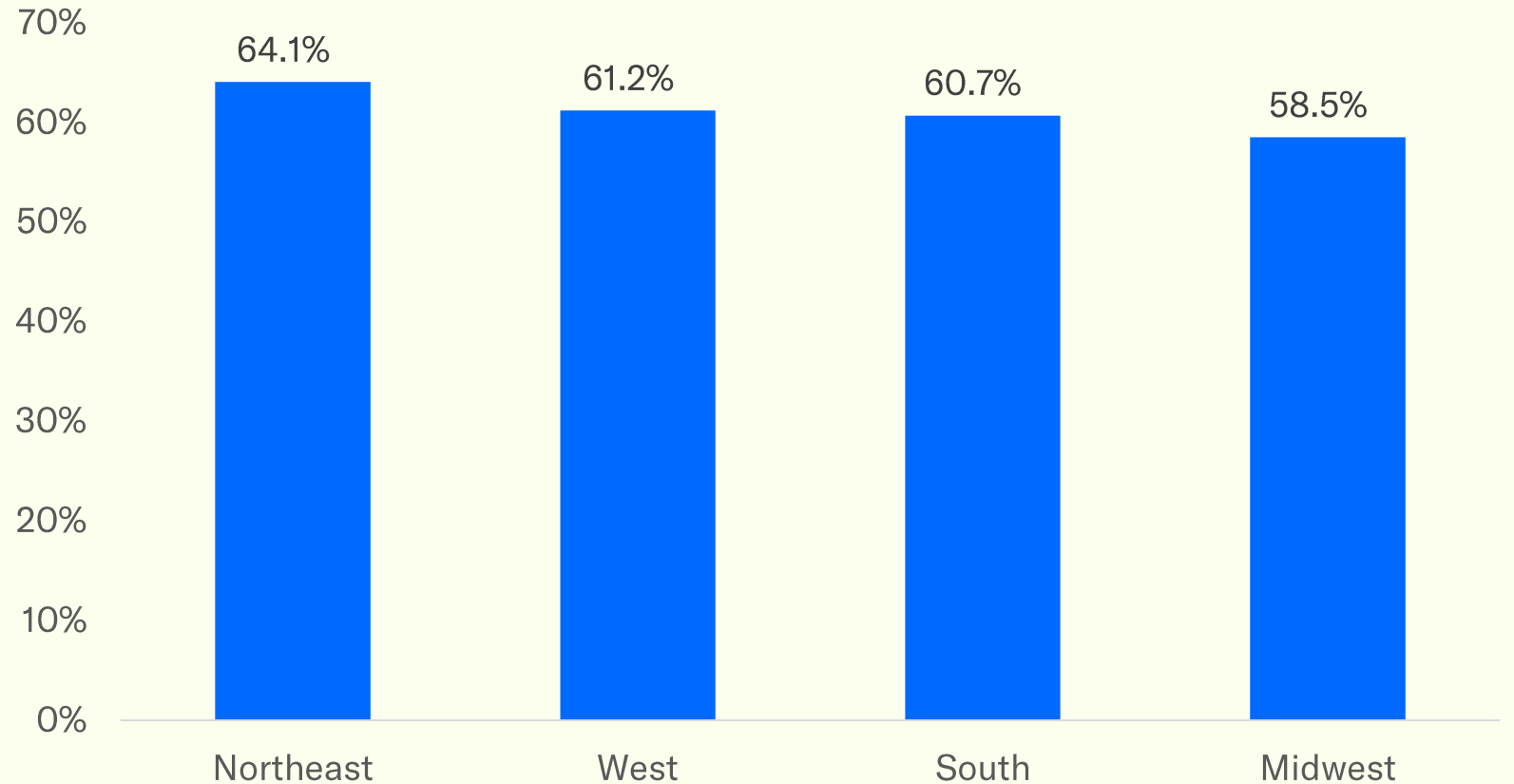
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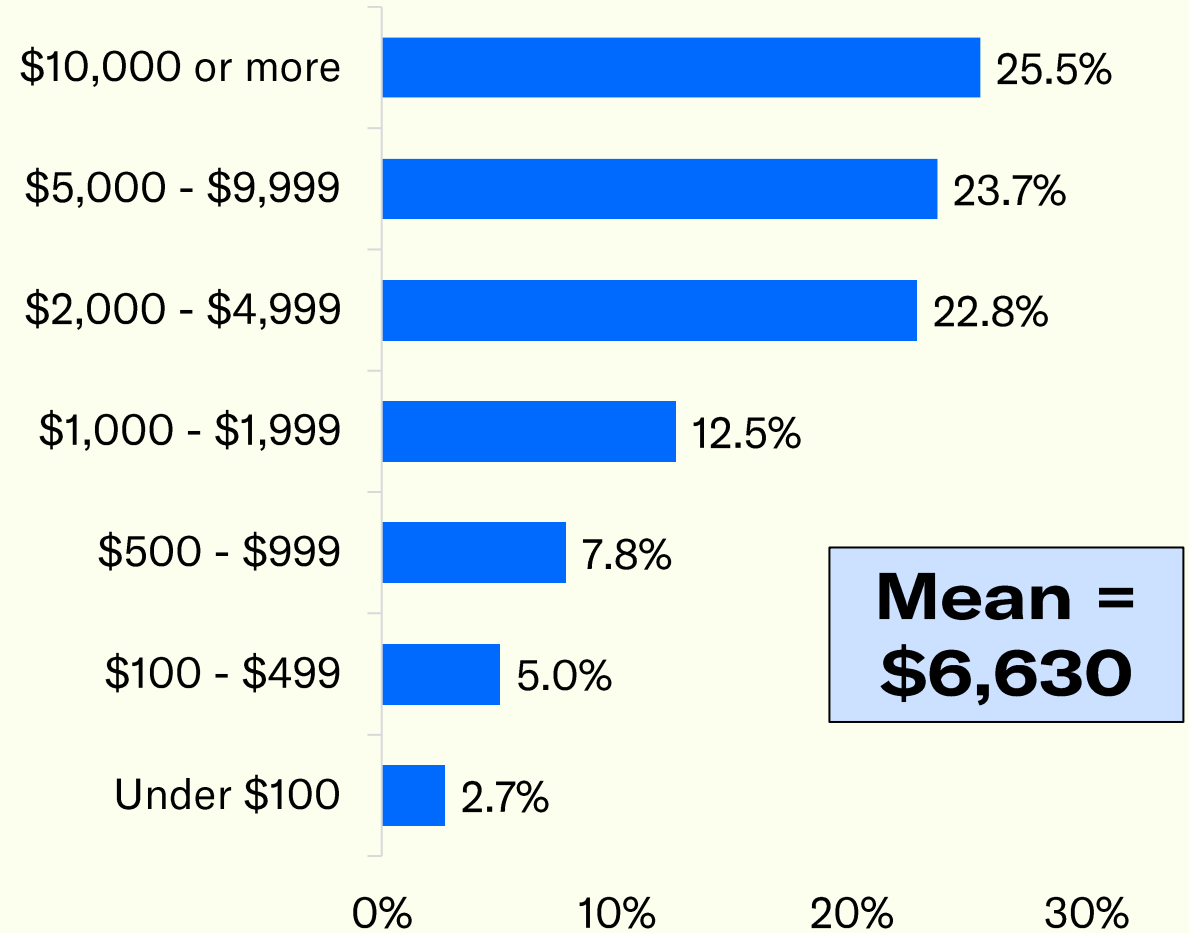
% Somewhat, High, or Extremely High Priority



Americans Continue to Make Space for Travel Spending

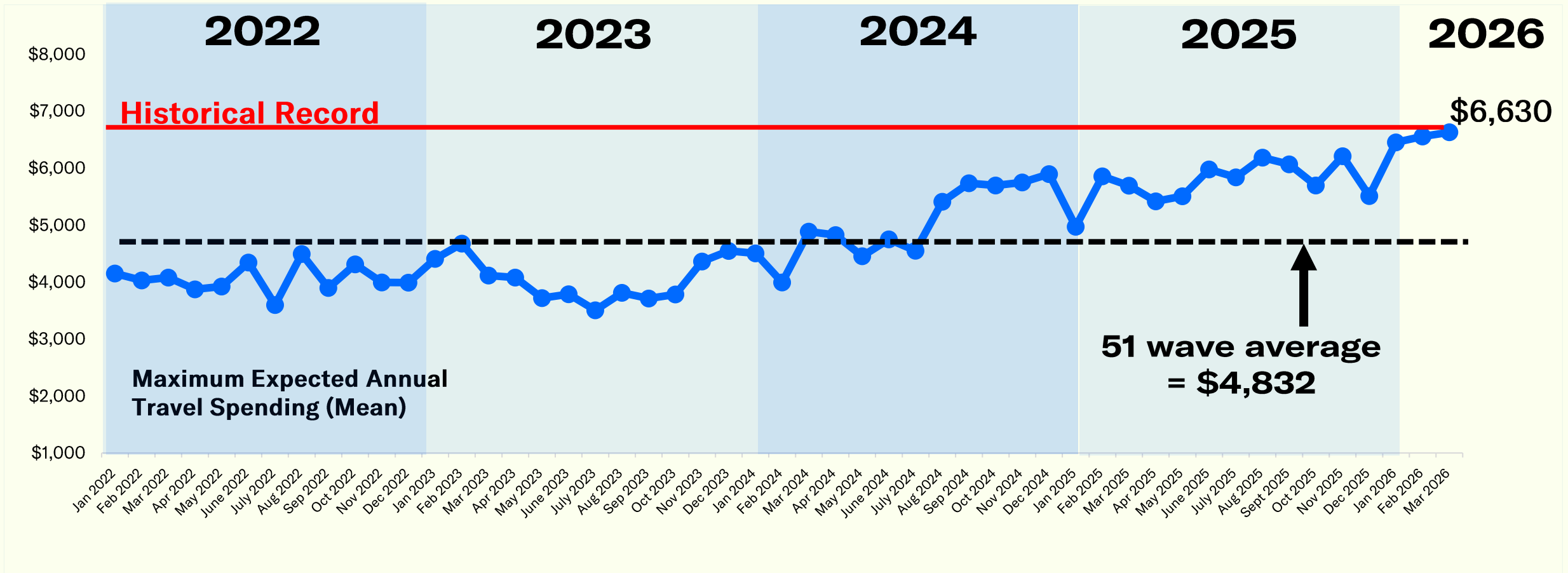
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How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?



Americans Continue to Make Space for Travel Spending

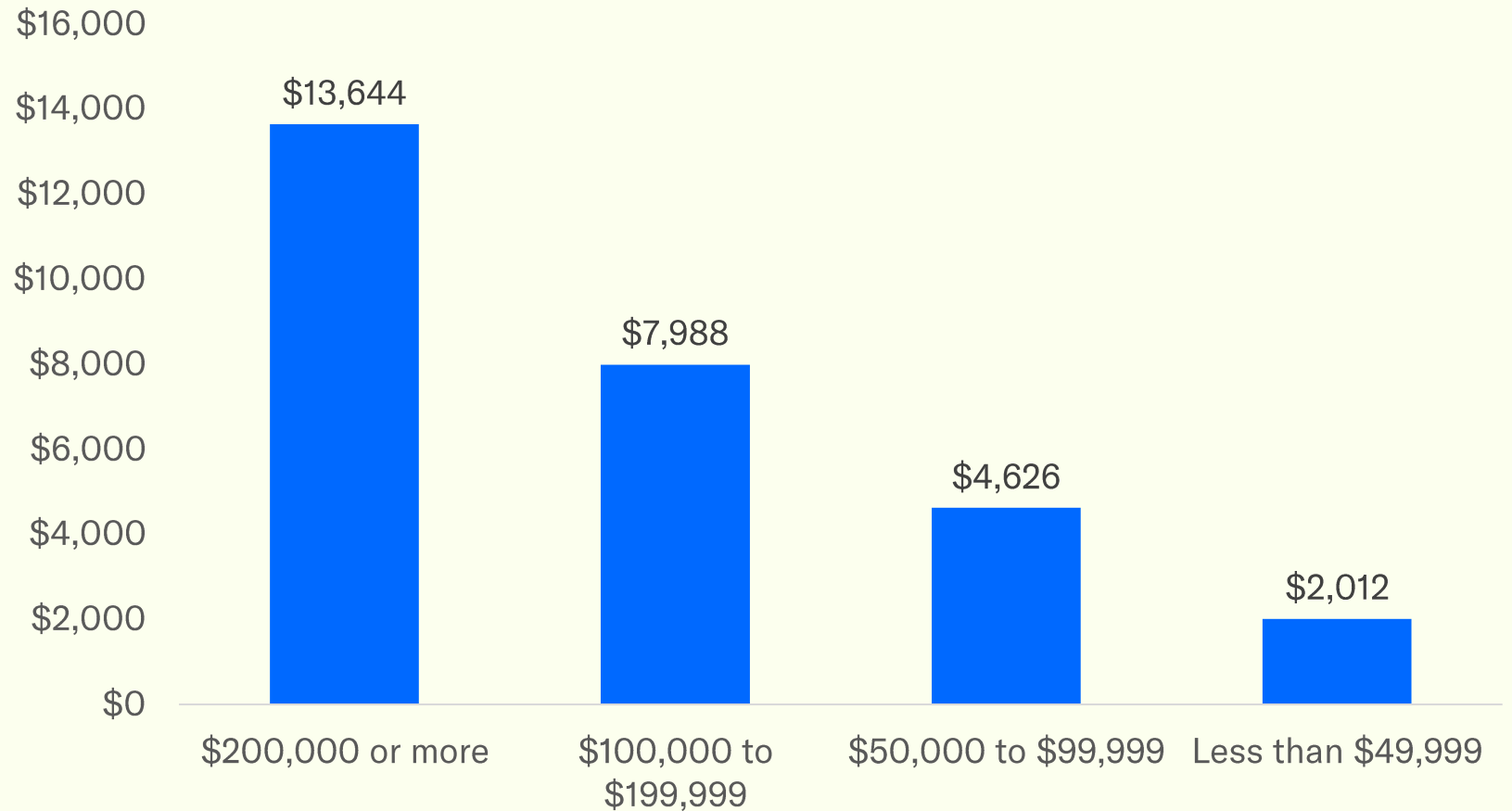
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Annual Travel Budget **By Household Income**

Question:

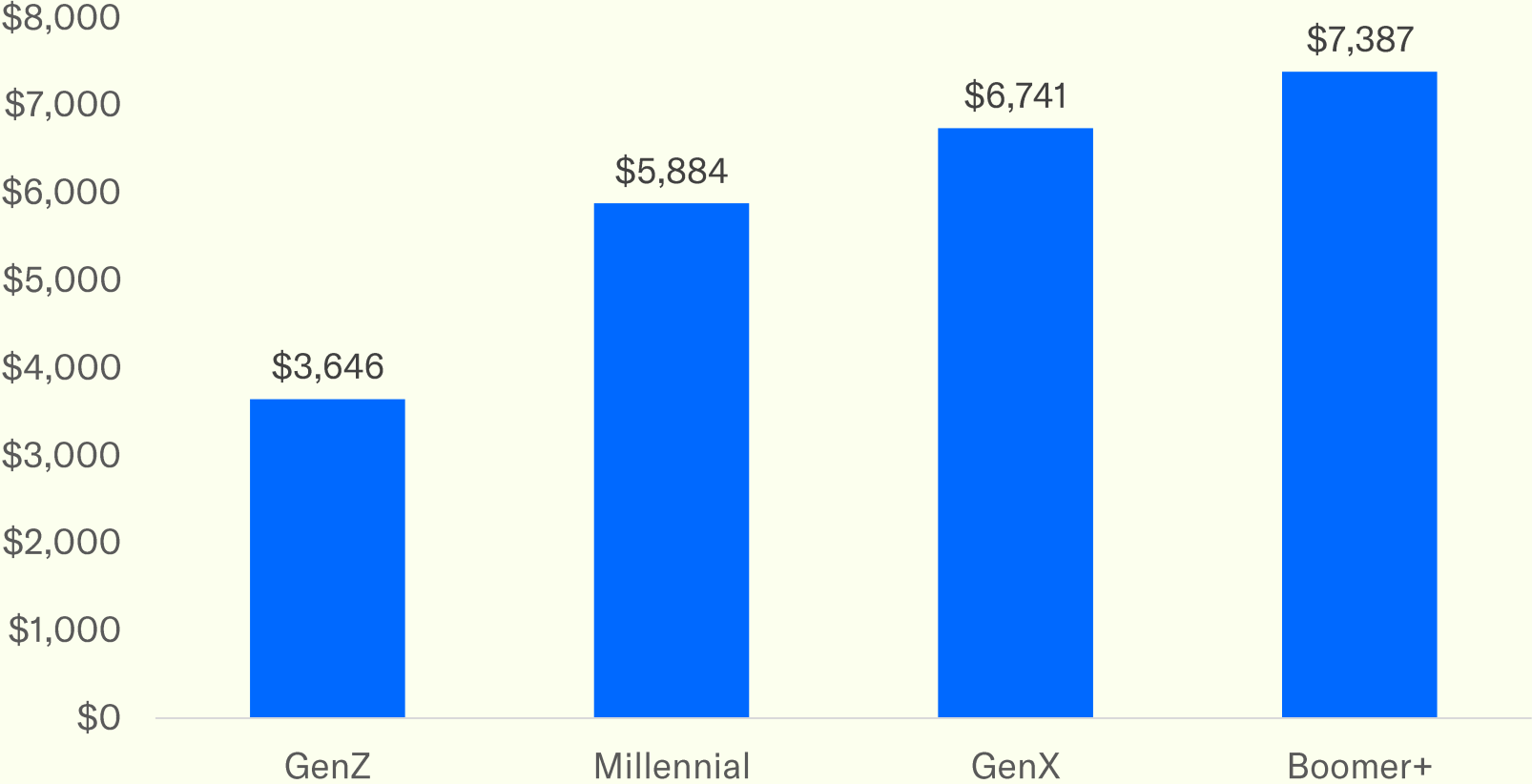
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Annual Travel Budget **By Generation**

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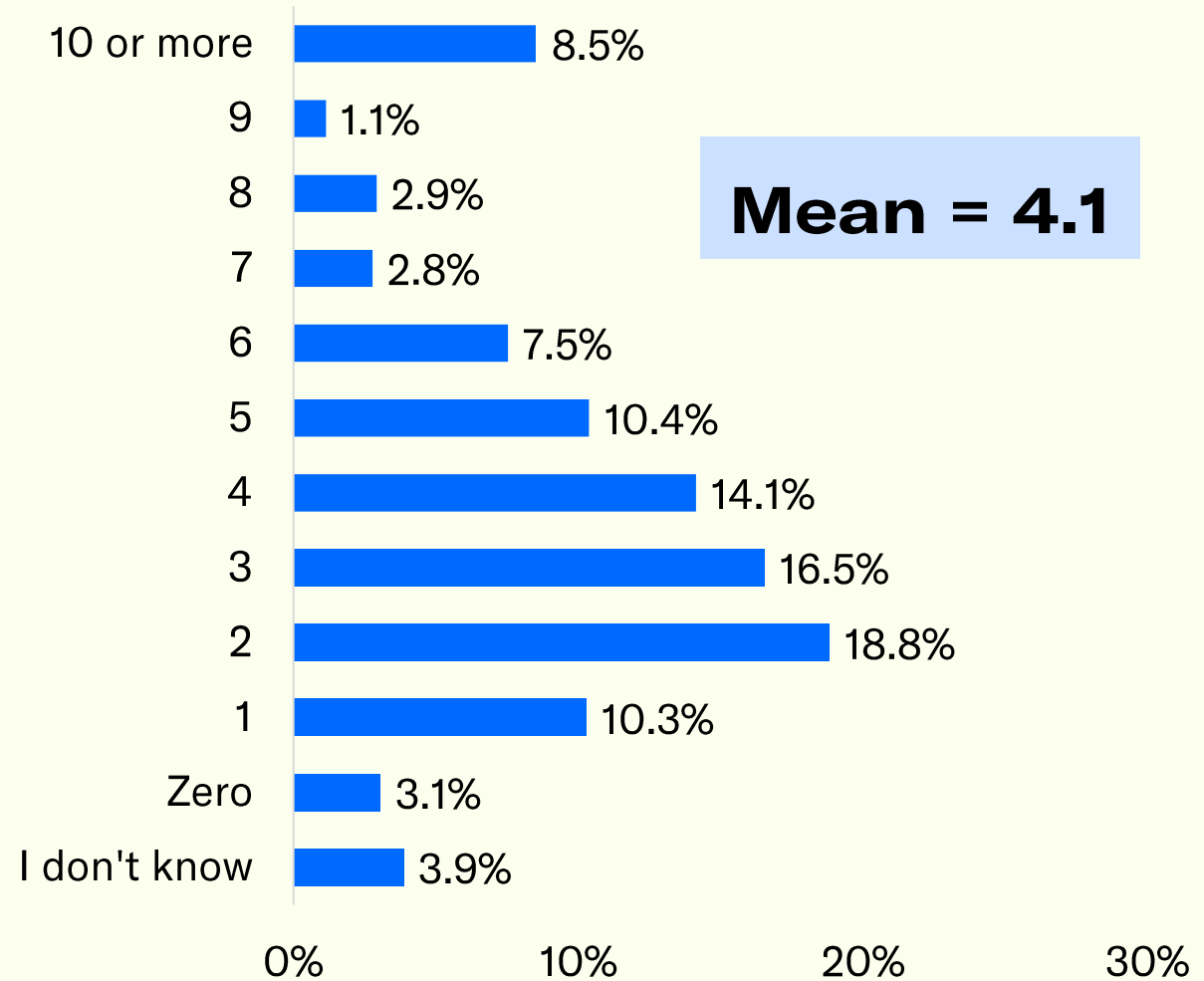
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The Year Ahead Looks Travel Filled, with Most Planning 3+ Trips

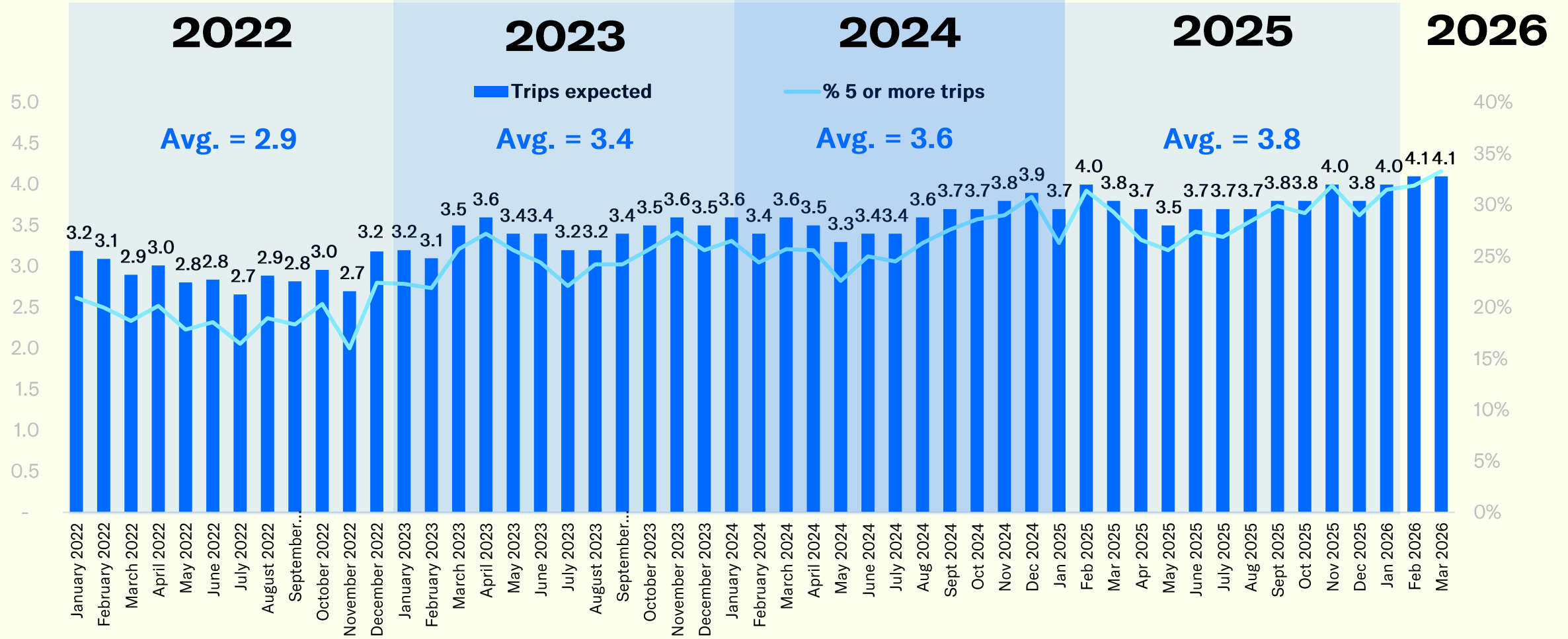
Question:

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



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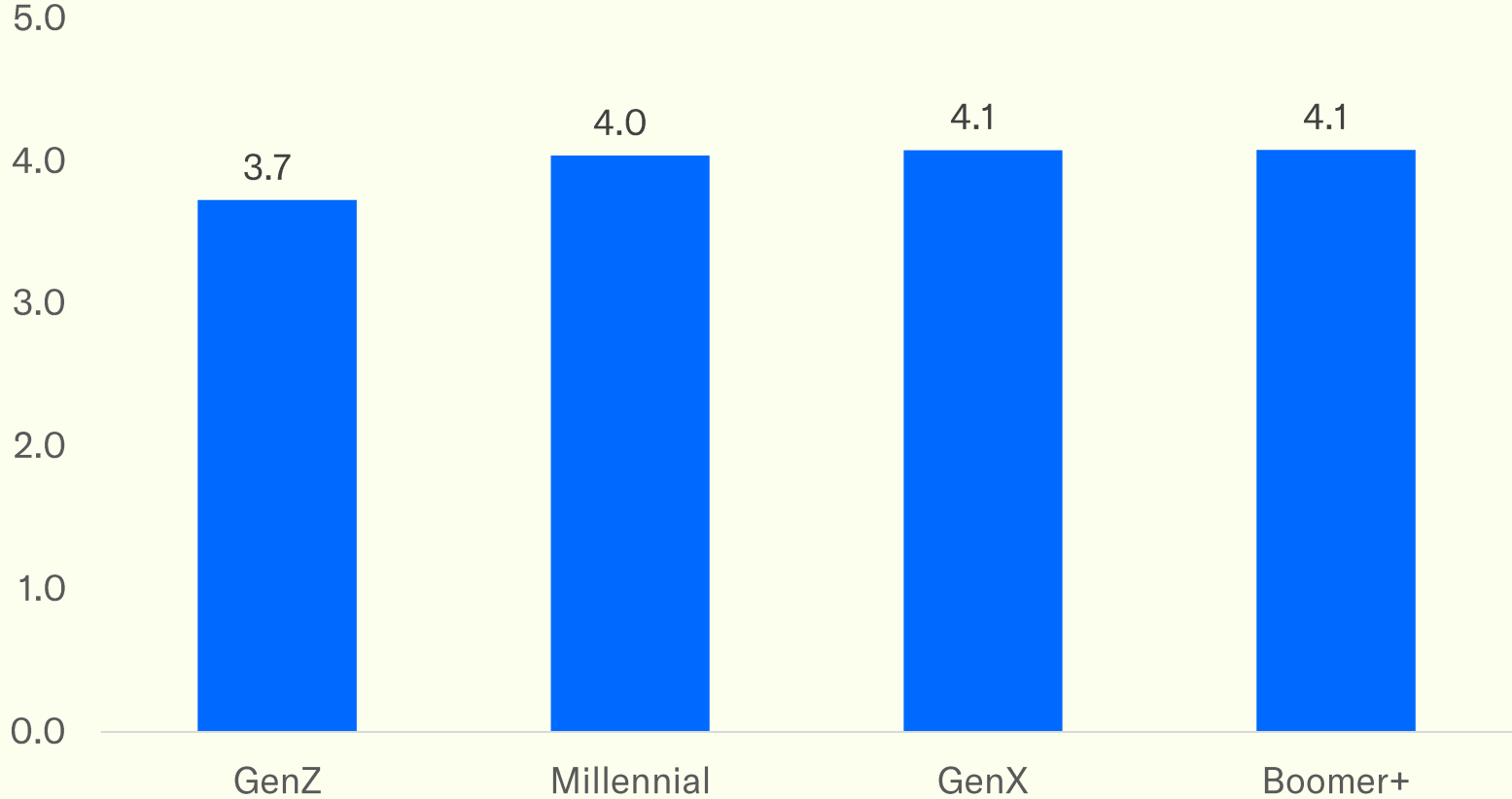


Leisure Trip Volume (Next 12 Months) By Generation

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

Mean # of Trips

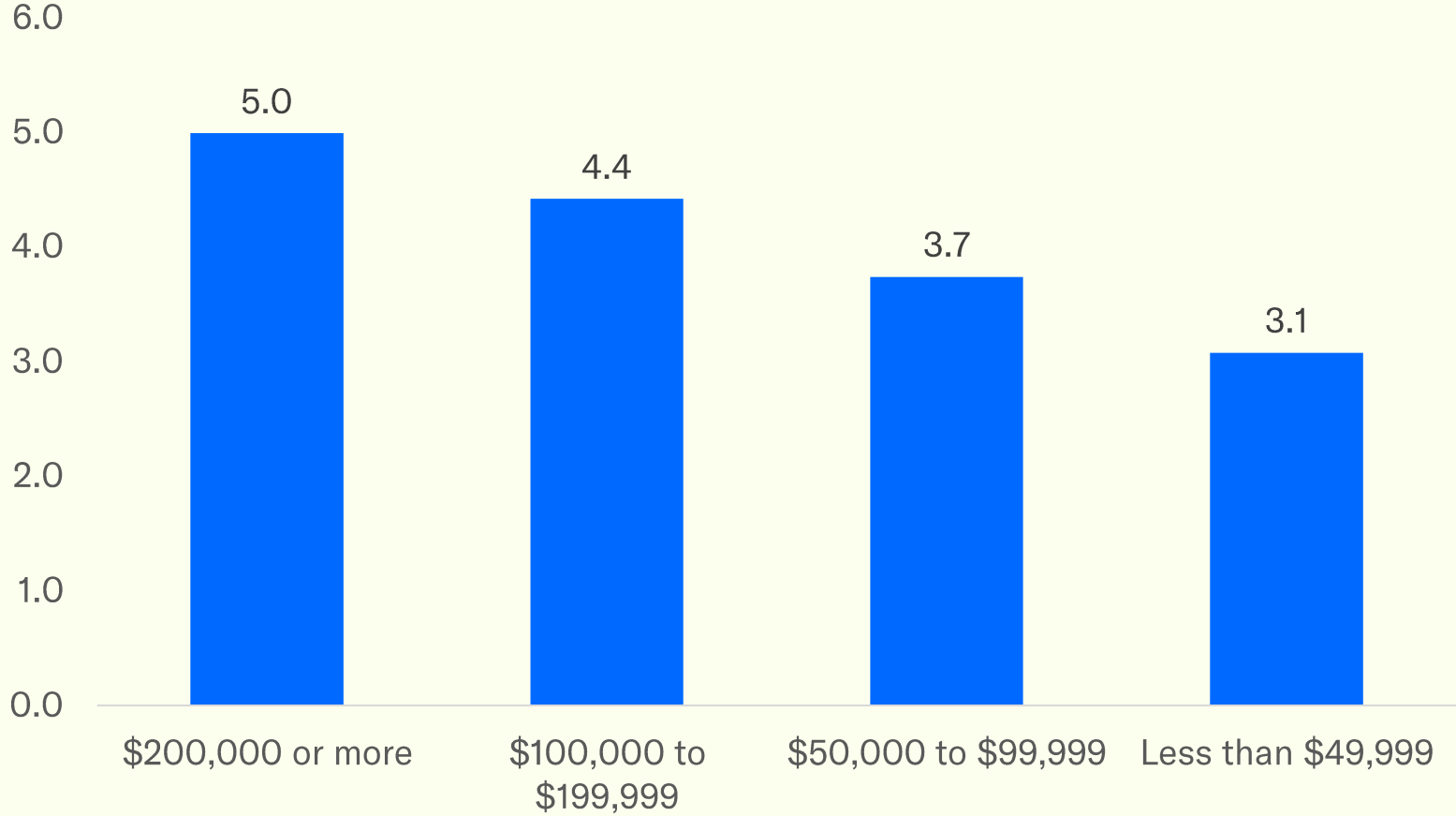


Leisure Trip Volume (Next 12 Months) By Household Income

Question:

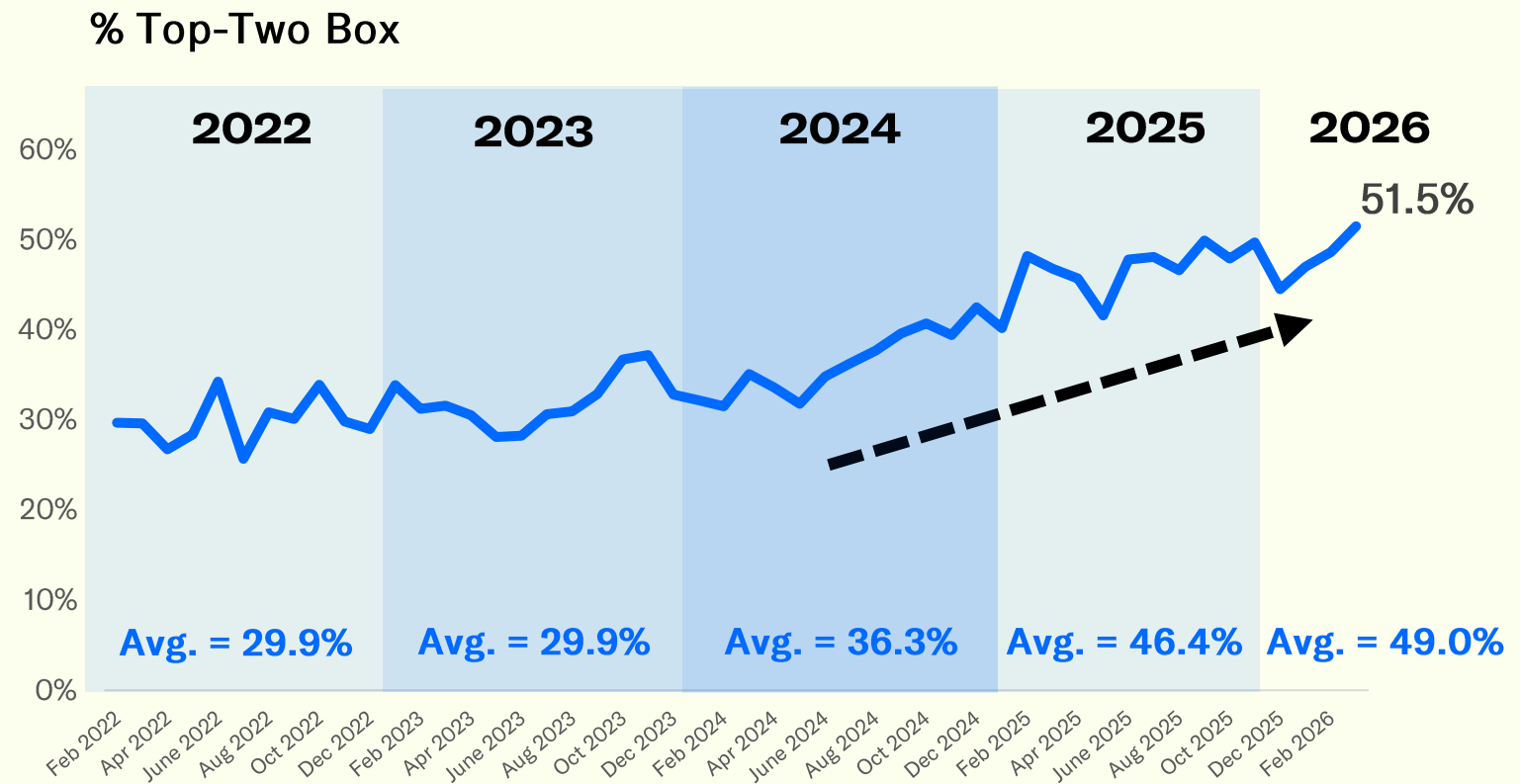
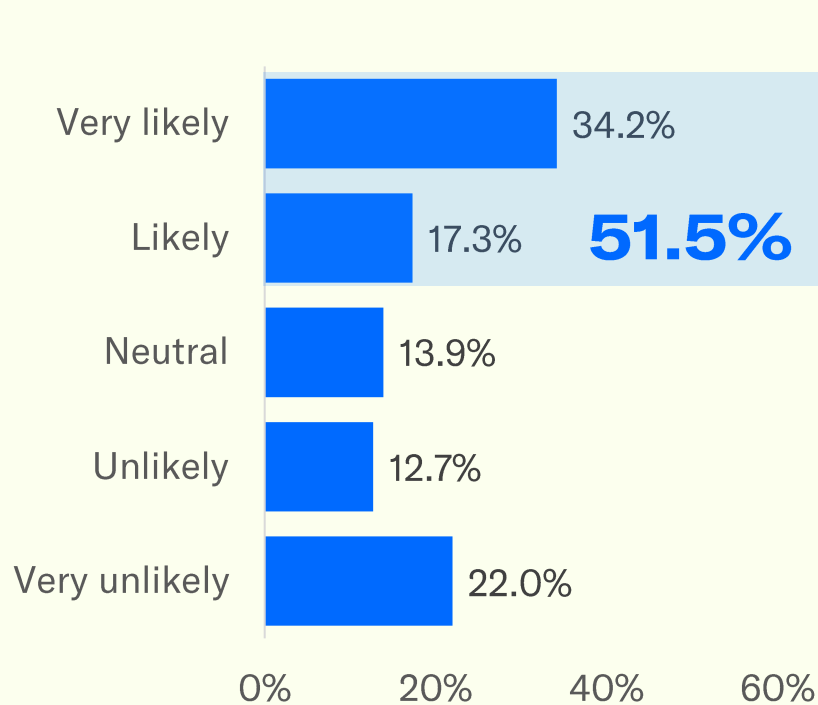
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Mean # of Trips



More Than Half Are Now Likely to Travel Outside the U.S.

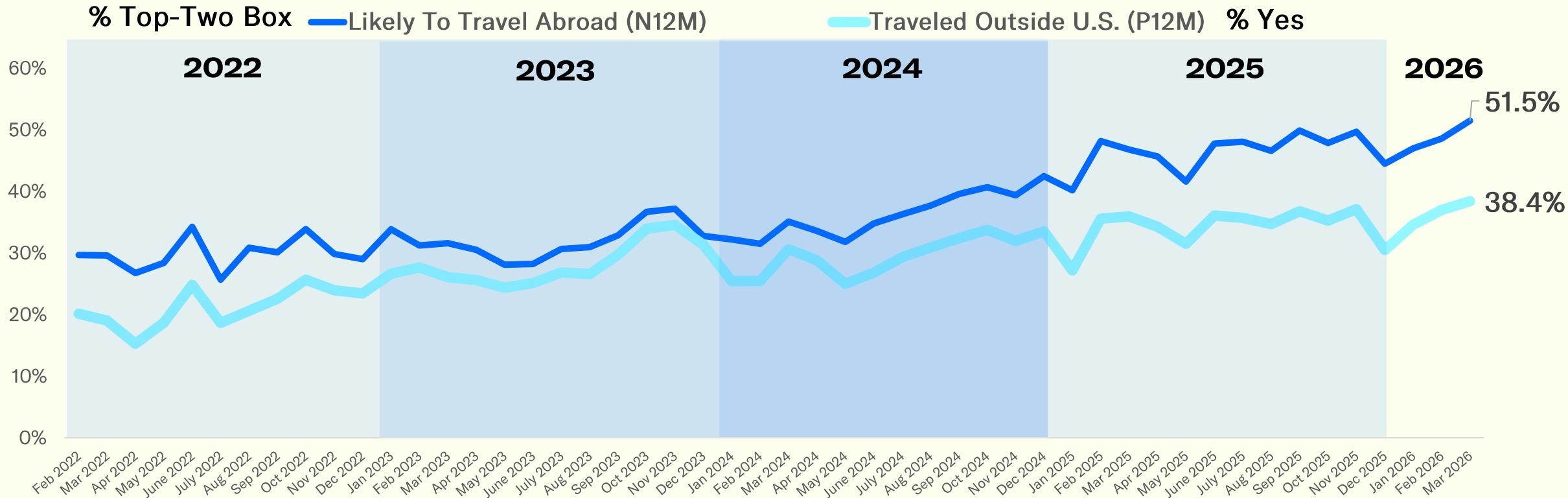
Question: How likely are you to travel outside the United States for leisure in the NEXT 12 MONTHS?



Higher Likelihood to Travel Abroad Does Translate to More Actual Trips Taken Outside the U.S.

Questions:

1. How likely are you to travel outside the United States for leisure in the NEXT 12 MONTHS?
2. In the PAST 12 MONTHS, have you traveled outside the United States?



Likelihood to Travel Outside the U.S. (Next 12 Months) **By Household Income**

Question:

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

% Likely or Very Likely

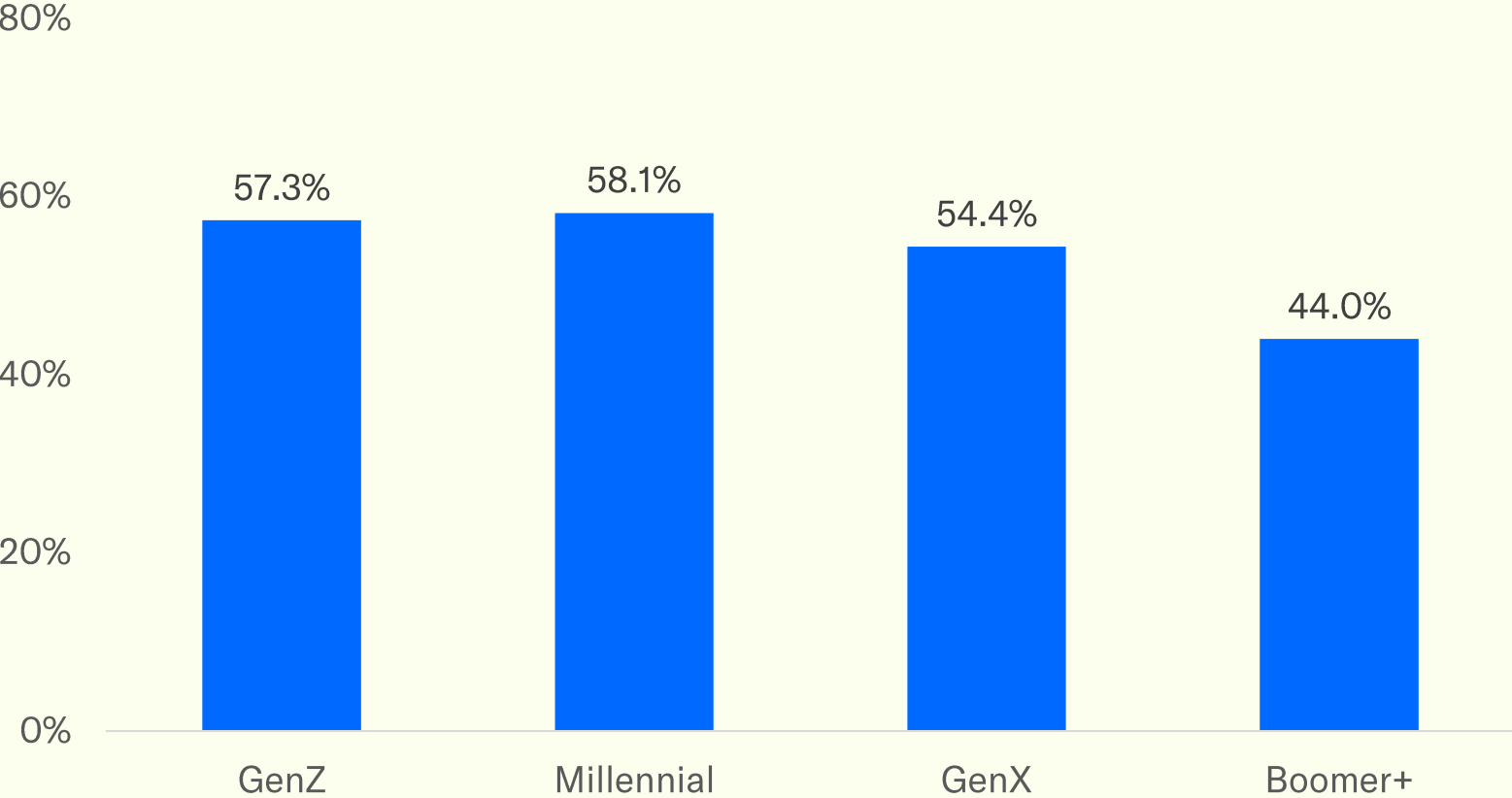


Likelihood to Travel Outside the U.S. (Next 12 Months) **By Generation**

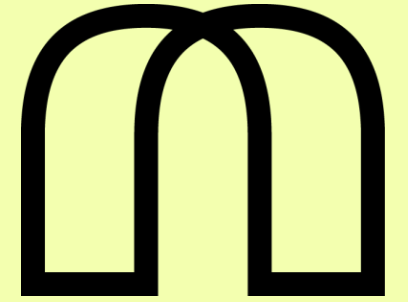
Question:

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

% Likely or Very Likely



We Asked...



**Which FOREIGN
DESTINATIONS do you most
want to visit in the NEXT
TWELVE (12) MONTHS?
(Write in up to 5)**

Top 10 Desired International Destinations

By Generation

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

GenZ

1. Japan
2. Paris
3. Greece
4. London
5. Canada
6. **China**
7. Mexico
8. **Dubai**
9. Italy
10. France

Millennial

1. Japan
2. Italy
3. Paris
4. Canada
5. United Kingdom
6. France
7. Mexico
8. **Australia**
9. Spain
10. Germany

GenX

1. Italy
2. Japan
3. Canada
4. United Kingdom
5. Paris
6. Mexico
7. France
8. **Ireland**
9. Spain
10. Greece

Boomer+

1. Italy
2. United Kingdom
3. Canada
4. Spain
5. France
6. Mexico
7. **Ireland**
8. Germany
9. Greece
10. **Caribbean**

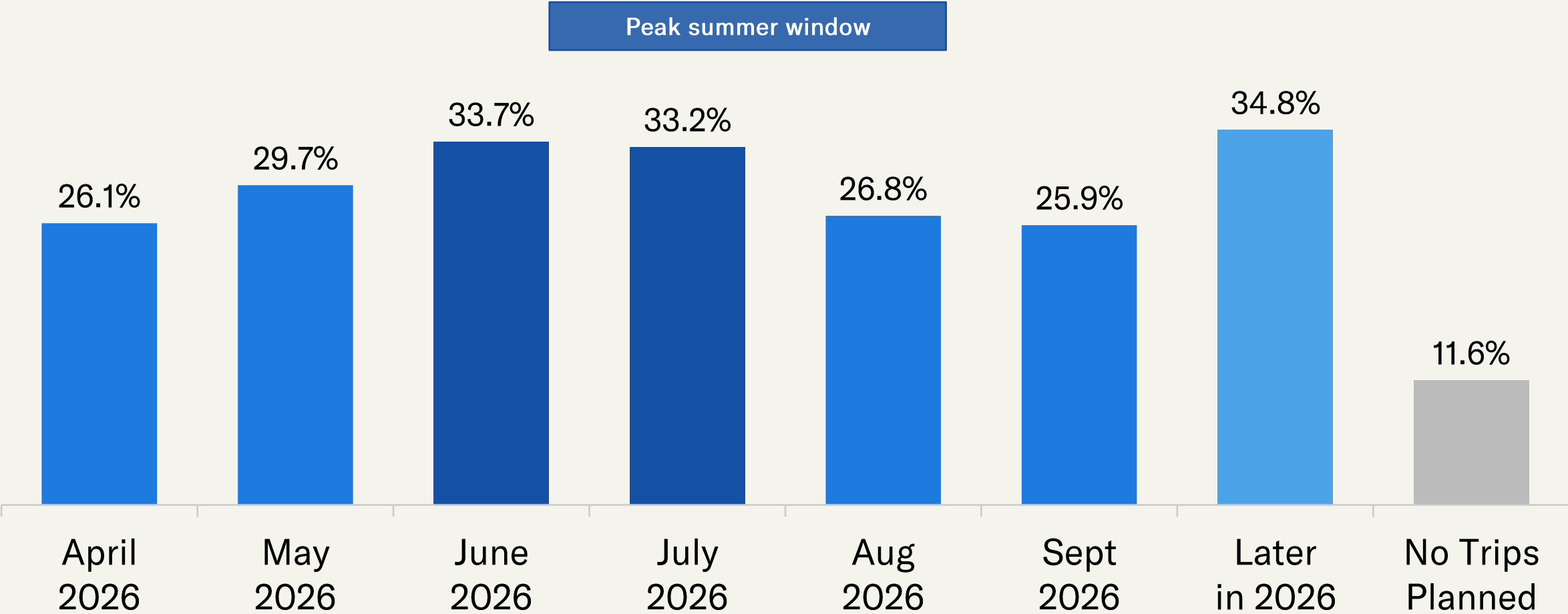
A scenic landscape of a mountain valley. In the foreground, a hiker is visible on a rocky trail on the right, and a person in a red jacket is sitting on the rocks. The middle ground features a calm, turquoise lake reflecting the surrounding mountains and sky. The background consists of rugged, rocky mountains with patches of snow and dense evergreen forests. The sky is a clear blue with some light clouds.

Future Partners

**The State of the
American Traveler:
Canada Edition**

Americans are Committed to Summer Travel

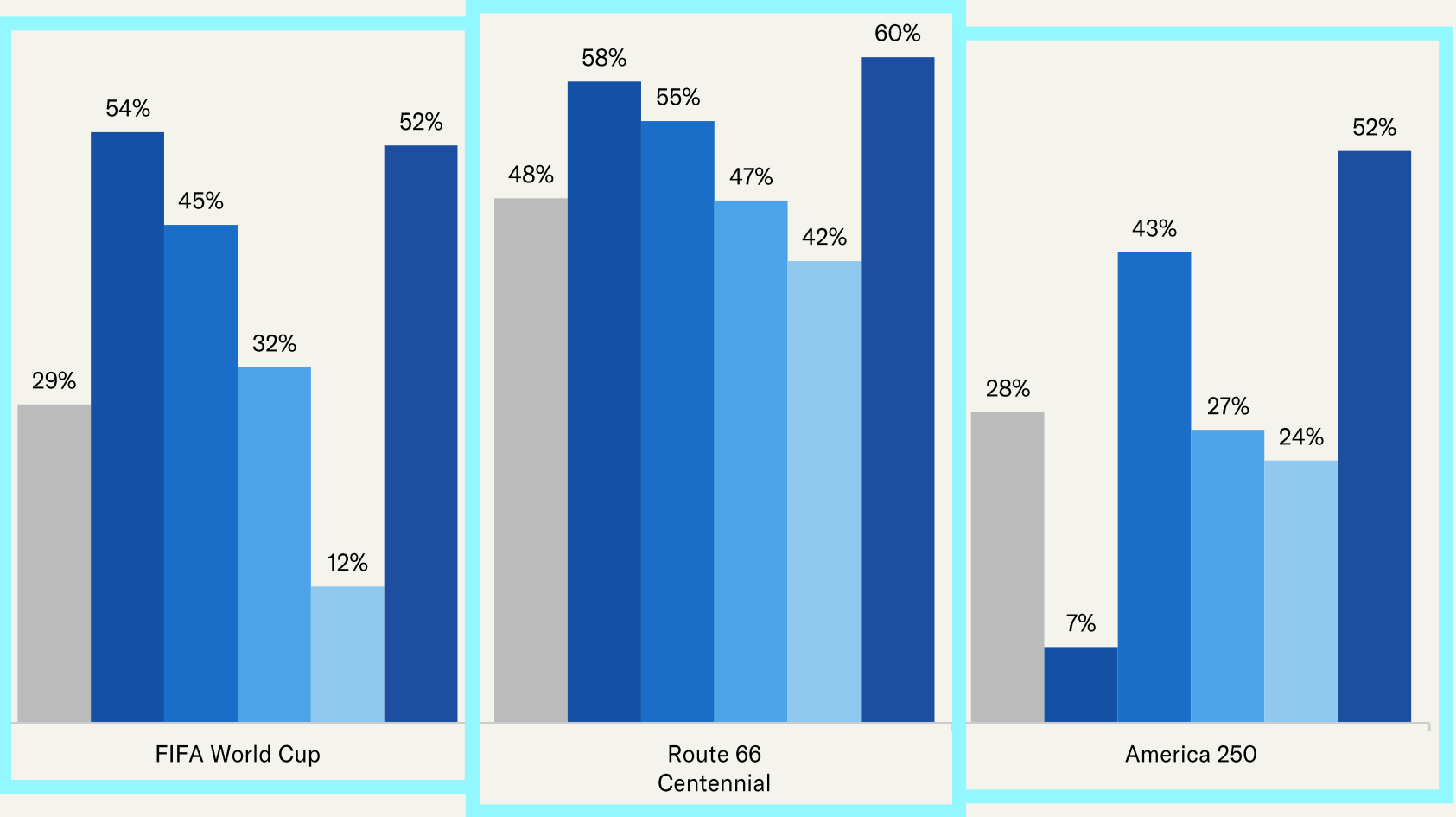
Question: In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



2026 Marquee Event Travel Interest

Family Travelers a Key Segment for All; GenZ Driving FIFA World Cup and Route 66 Interest, Falling off for America 250

Question: Interest in traveling for each event. % interested (Top 2 Box) by Generation and Family Status



Parents of School-Age Children

52.4%
FIFA World Cup

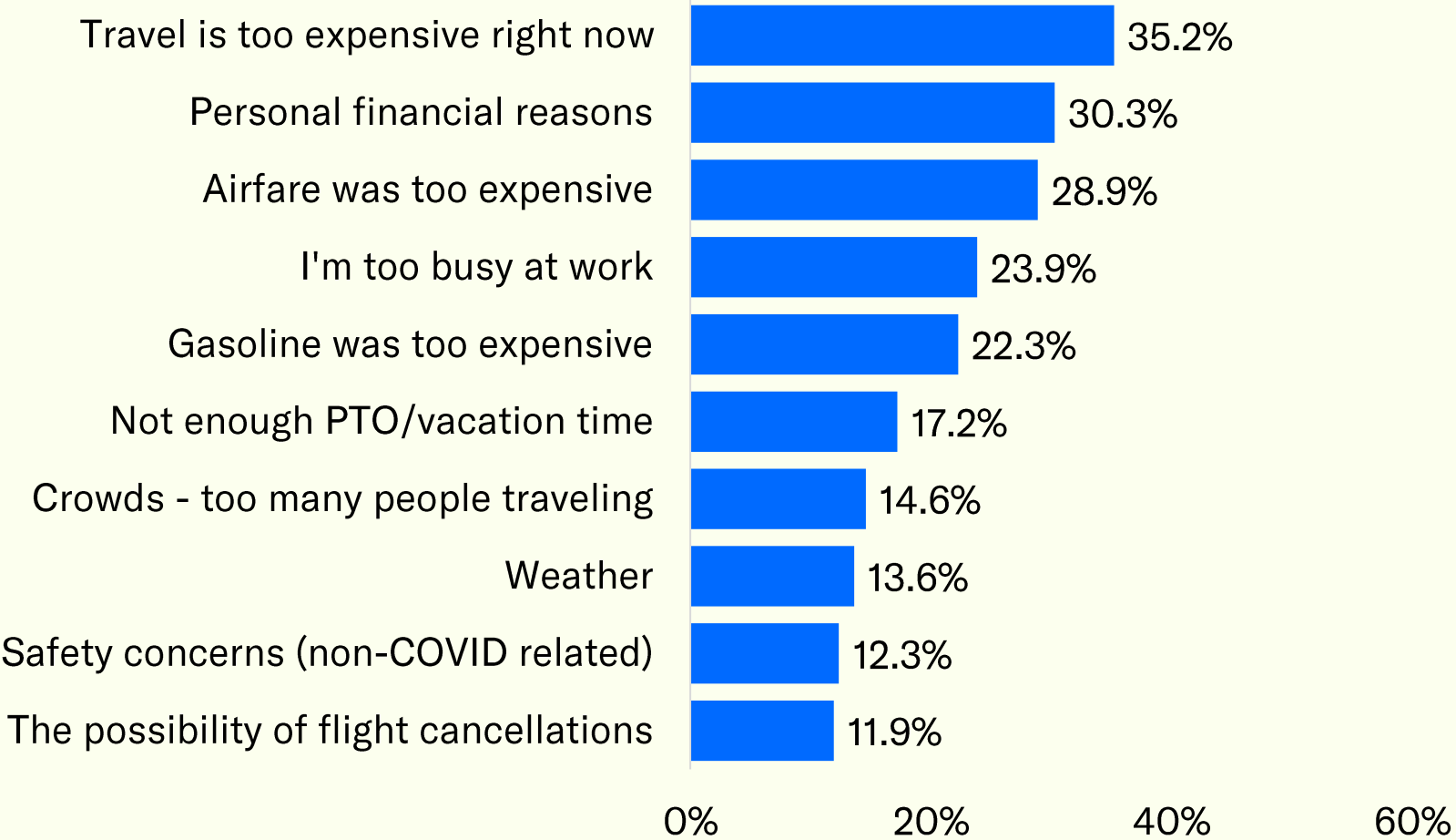
60.4%
Route 66 Centennial

51.9%
America 250

Cost Barriers are Reshaping How Travelers Decide and Plan

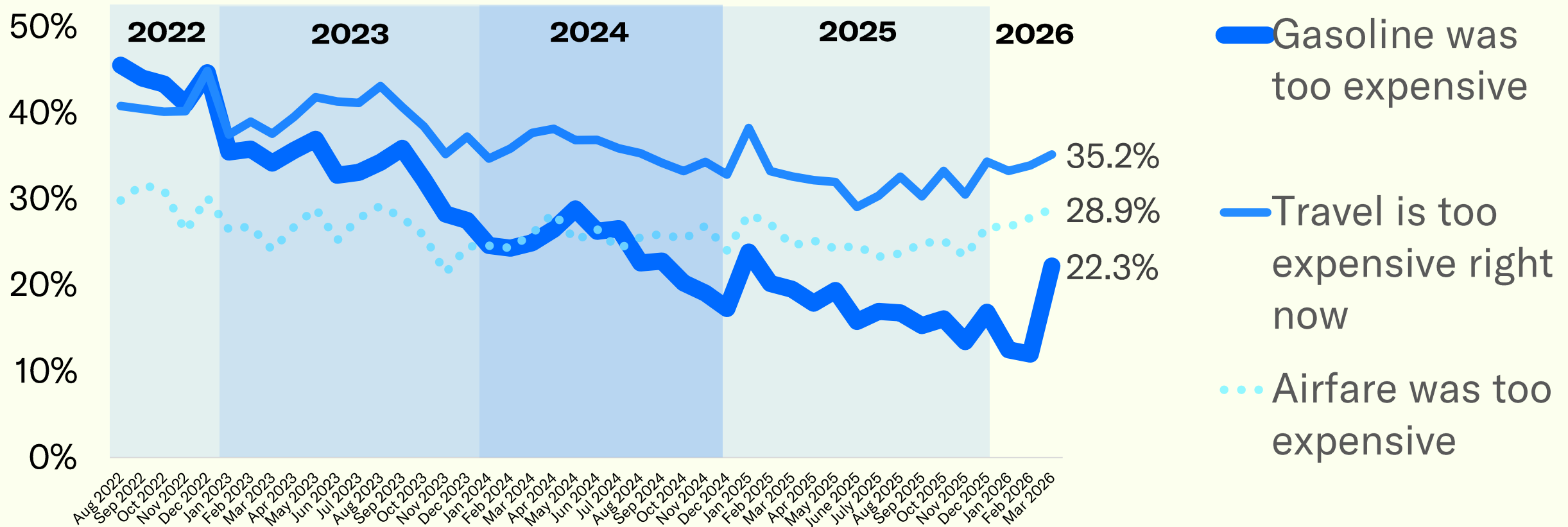
Question:

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)



Cost Related Travel Deterrents Are on the Rise

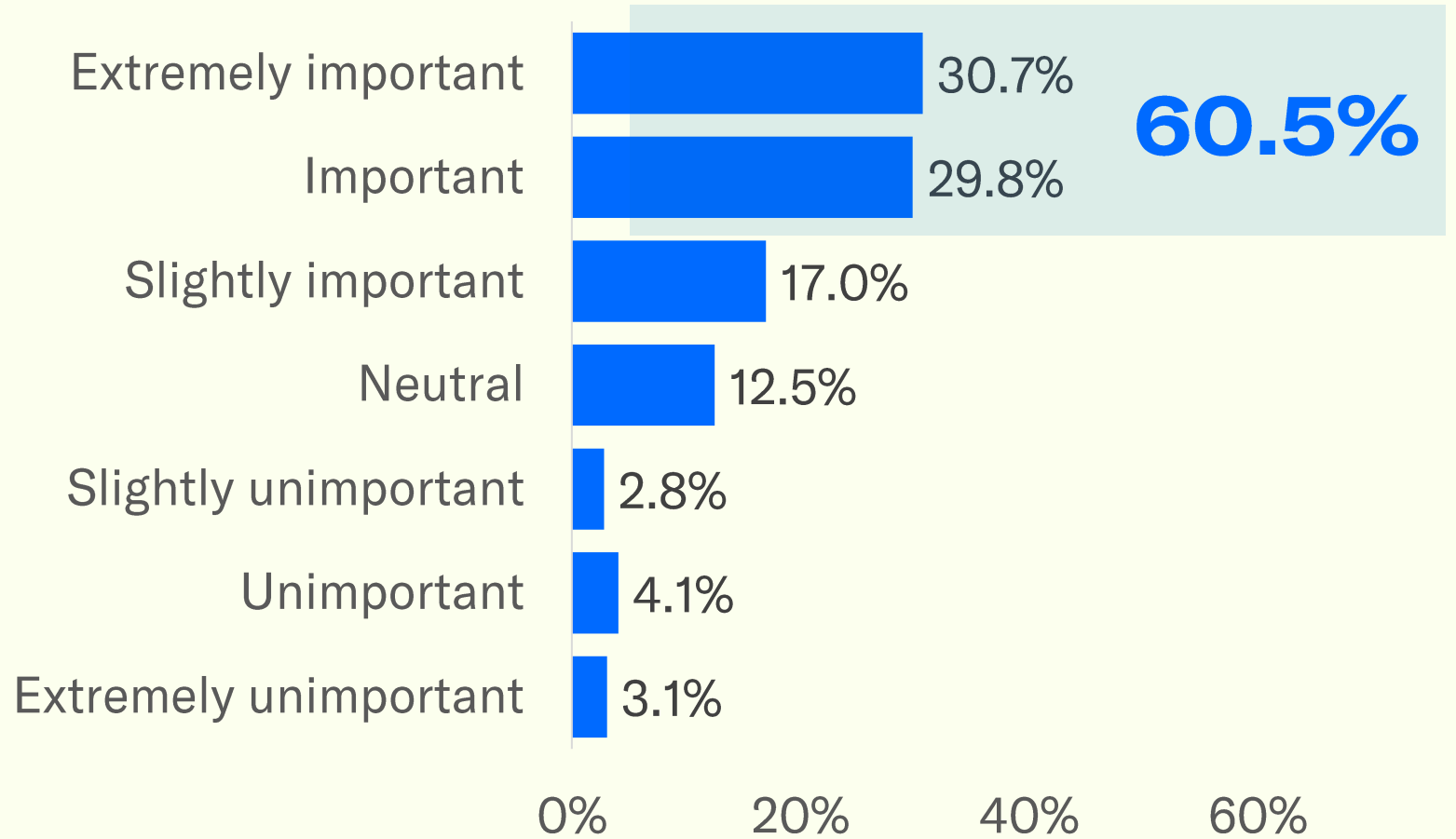
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Loyalty Programs And Rewards Have Become Critical Decision-making Tools

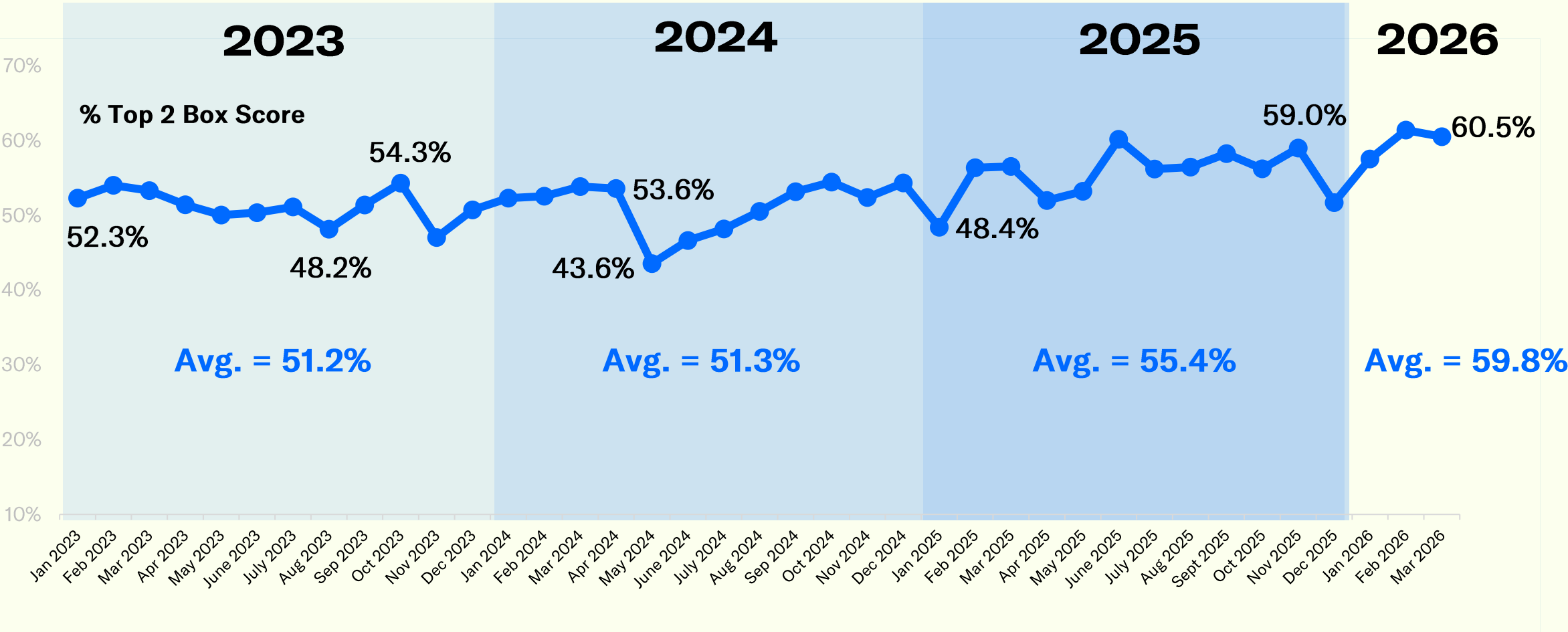
Question:

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



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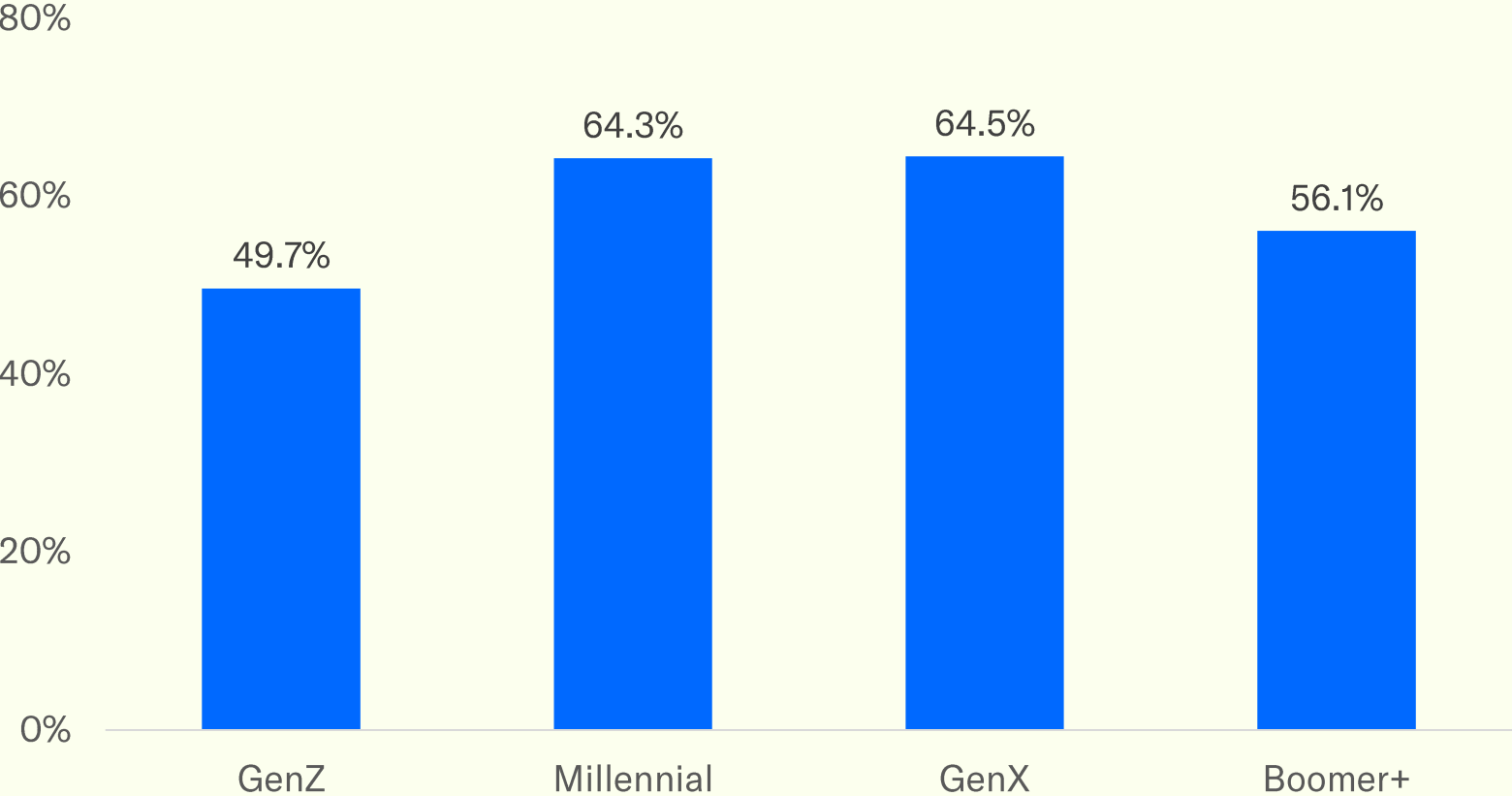


Importance of Loyalty Programs and Travel Rewards **By Generation**

Question:

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

% Important or Extremely Important

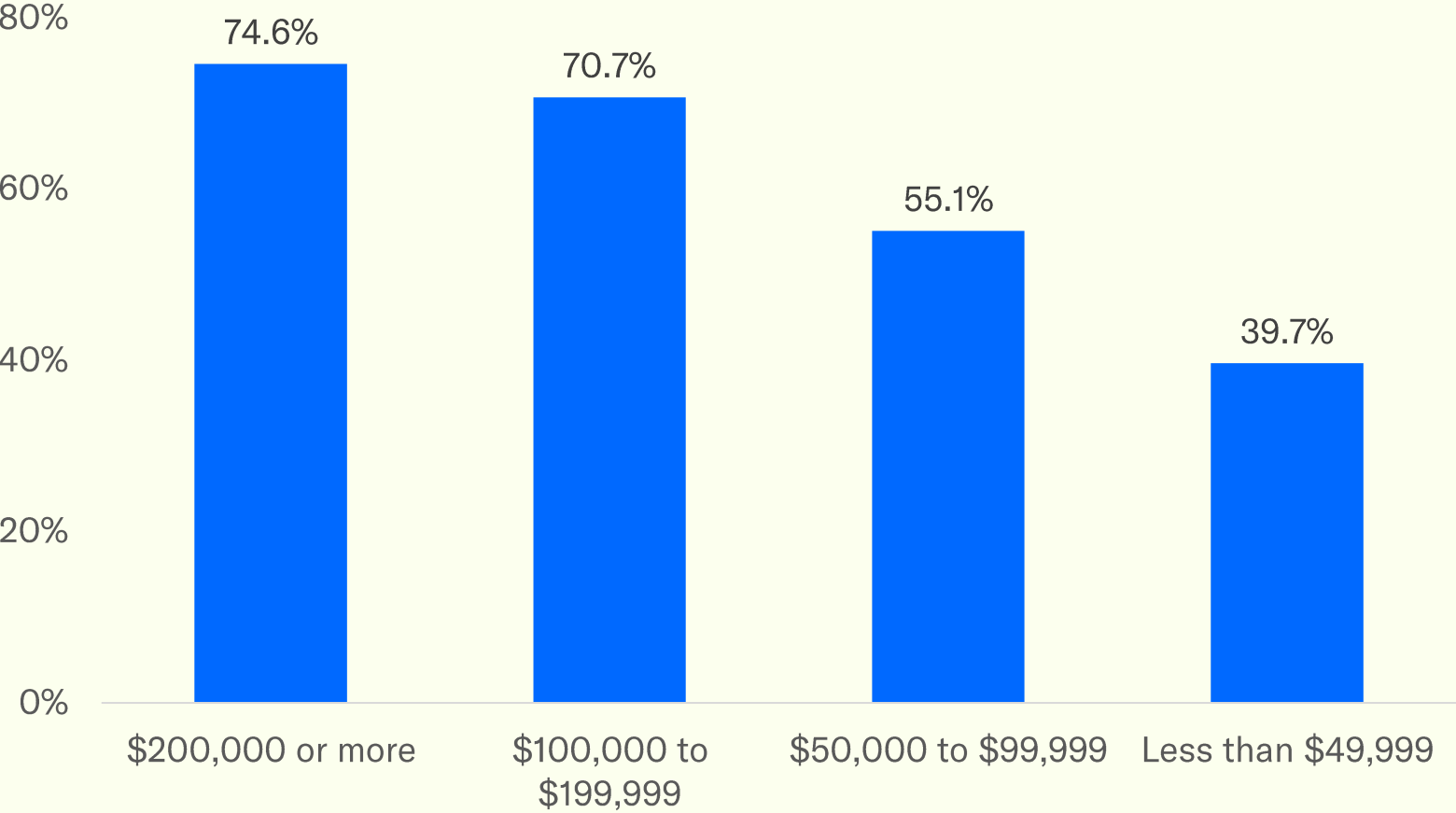


Importance of Loyalty Programs and Travel Rewards **By Household Income**

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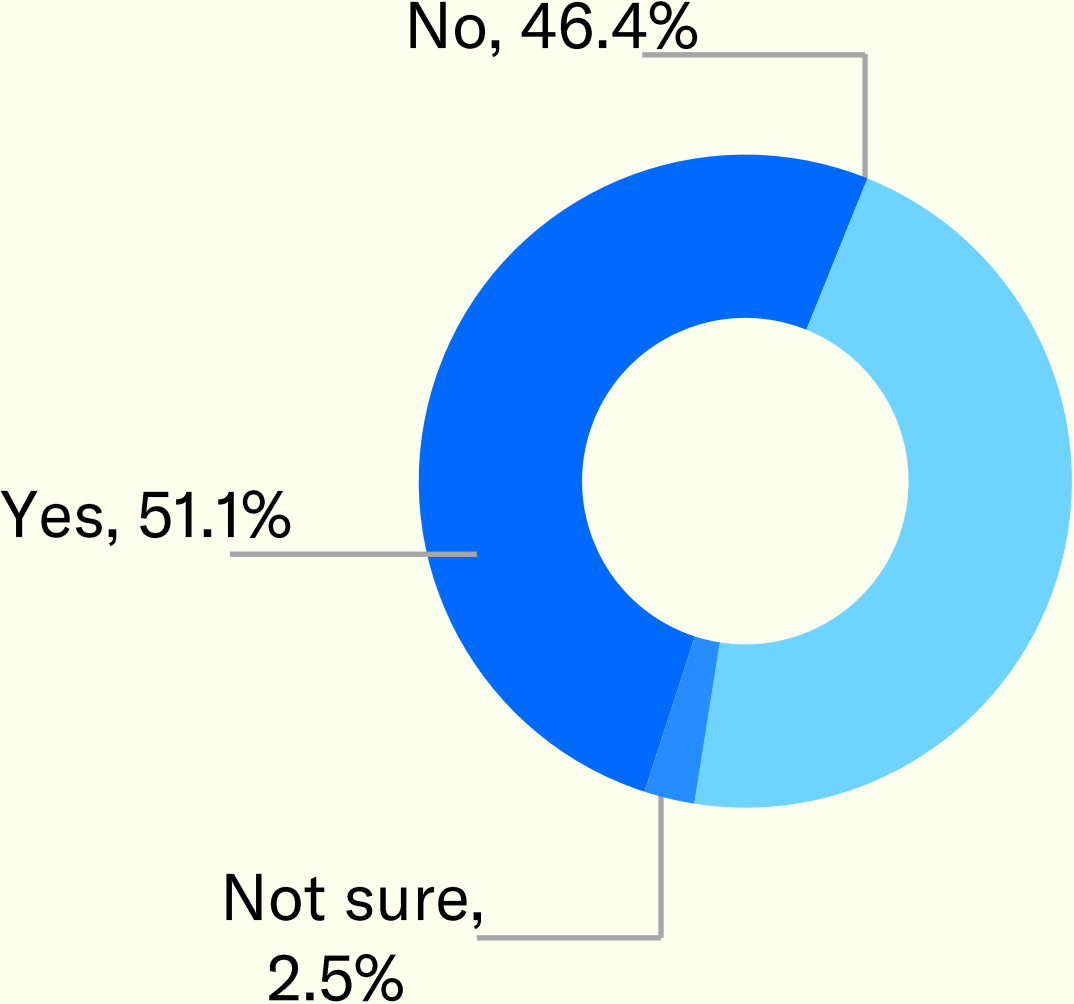
% Important or Extremely Important



Credit Card Points or Rewards

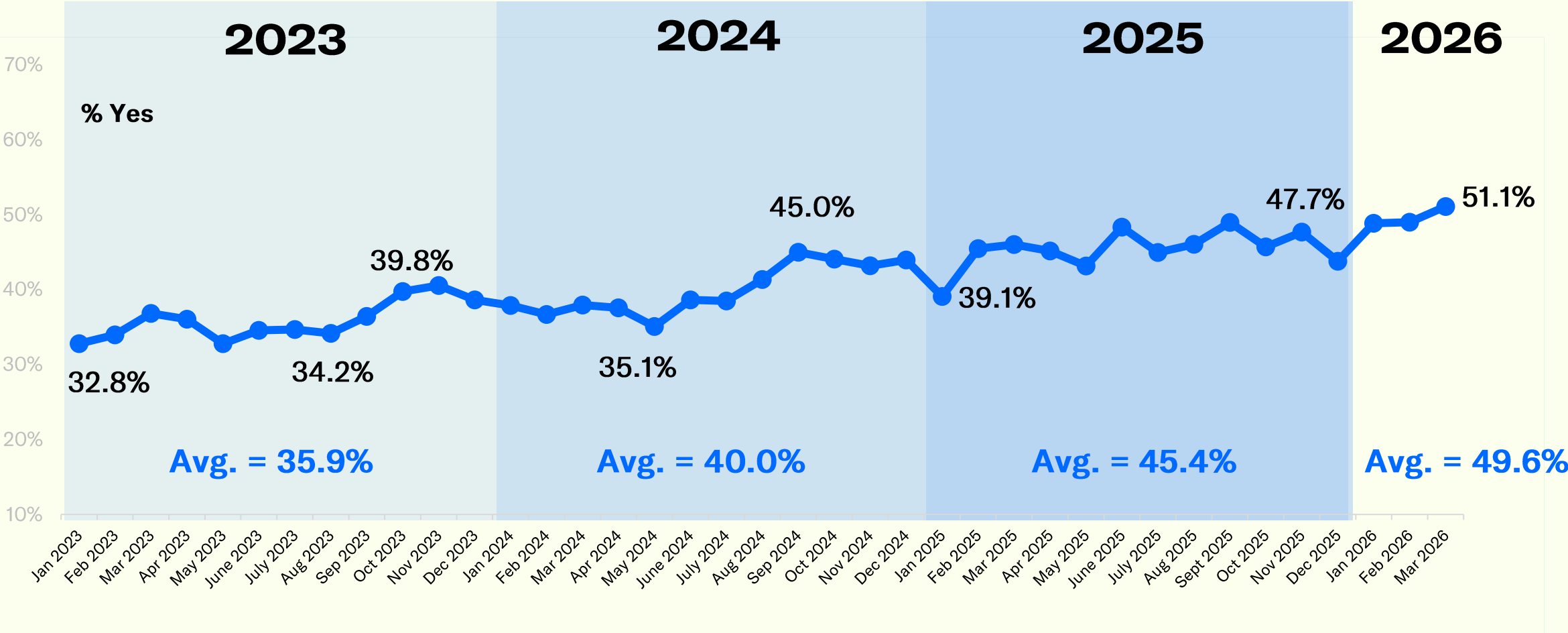
Question:

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



Use of Credit Card Points or Rewards for Travel Purchases Are on the Rise

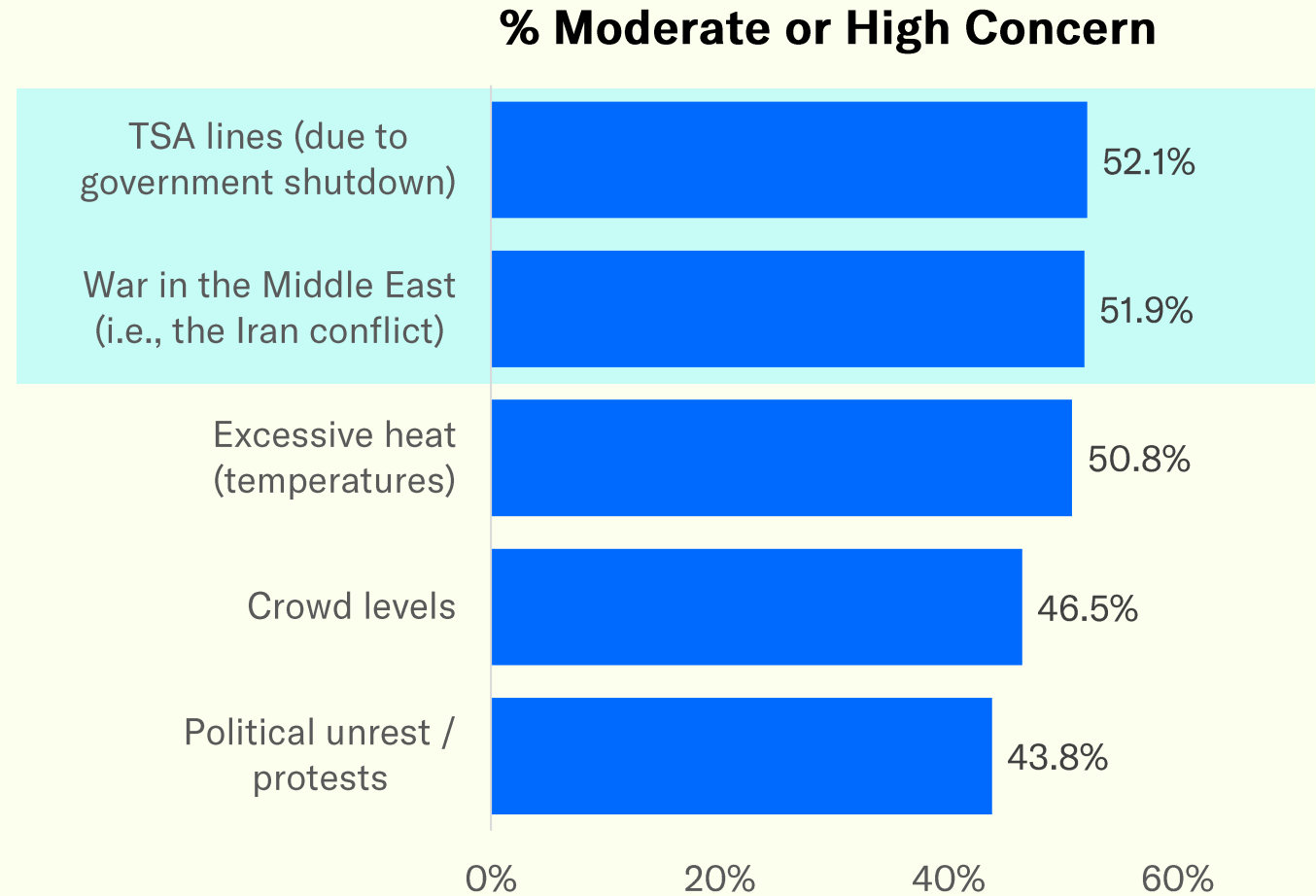
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TSA Lines & War in the Middle East Lead Other Concerns Related to Destination Choice

Question:

Think specifically about how you will be evaluating the places you choose to visit in the NEXT 12 MONTHS. How concerned are you about the following affecting your destination choice(s)?

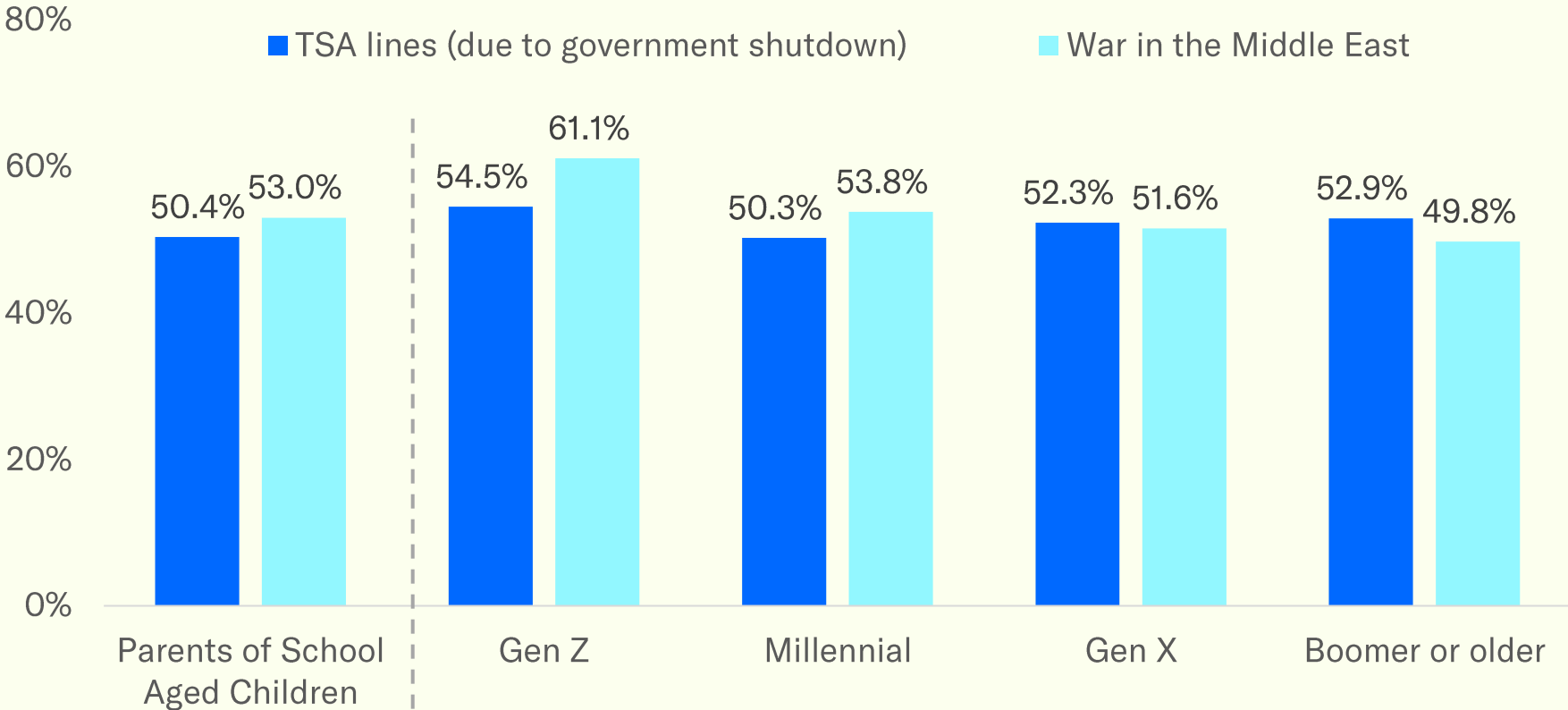


TSA Lines & War in the Middle East Affecting Destination Decisions **By Generation**

Question:

Think specifically about how you will be evaluating the places you choose to visit in the NEXT 12 MONTHS. How concerned are you about the following affecting your destination choice(s)?

% Who Said Each is a Moderate or High Concern



Key Takeaways

1. Recession fears spiked, but Americans are still committed to travel. Recession expectations jumped by more than 11 points in a single month — the biggest spike since spring 2025 — yet the average American traveler's maximum leisure travel budget simultaneously hit a new all-time record of \$6,630. More than six in ten say travel would remain a worthwhile investment even in a downturn. The anxiety is real, but so is the commitment.

2. Summer is effectively sold. More than a third of American travelers already have trips booked for June and July and only 11.6% say they have no trips planned at all. For destination marketers, the window to capture the first-mover audience has largely closed. The opportunity now lies with the uncommitted remainder and our data shows exactly who they are and what moves them.

3. TSA lines and the Middle East conflict have officially entered the destination decision. Operational and geopolitical concerns outranked heat, crowds, and political unrest as factors shaping where Americans choose to travel in the next 12 months. More than half cited both TSA disruptions and the Iran war as concerns — and the audiences most anxious are also the ones most actively booking. In the current environment, safety communication isn't a nice-to-have. It's a competitive differentiator.

Decoding Traveler Value

Introducing Future Partners'
Destination Value Index:

The new intelligence engine
powered by *The State of the
American Traveler*



RACE TO THE BOTTOM



\$99/night

Destination Value Index

Powered by *The State of the American Traveler*

Multi-Dimensional Analysis:

- Economic, Experiential, Emotional

The Value of Timely Data:

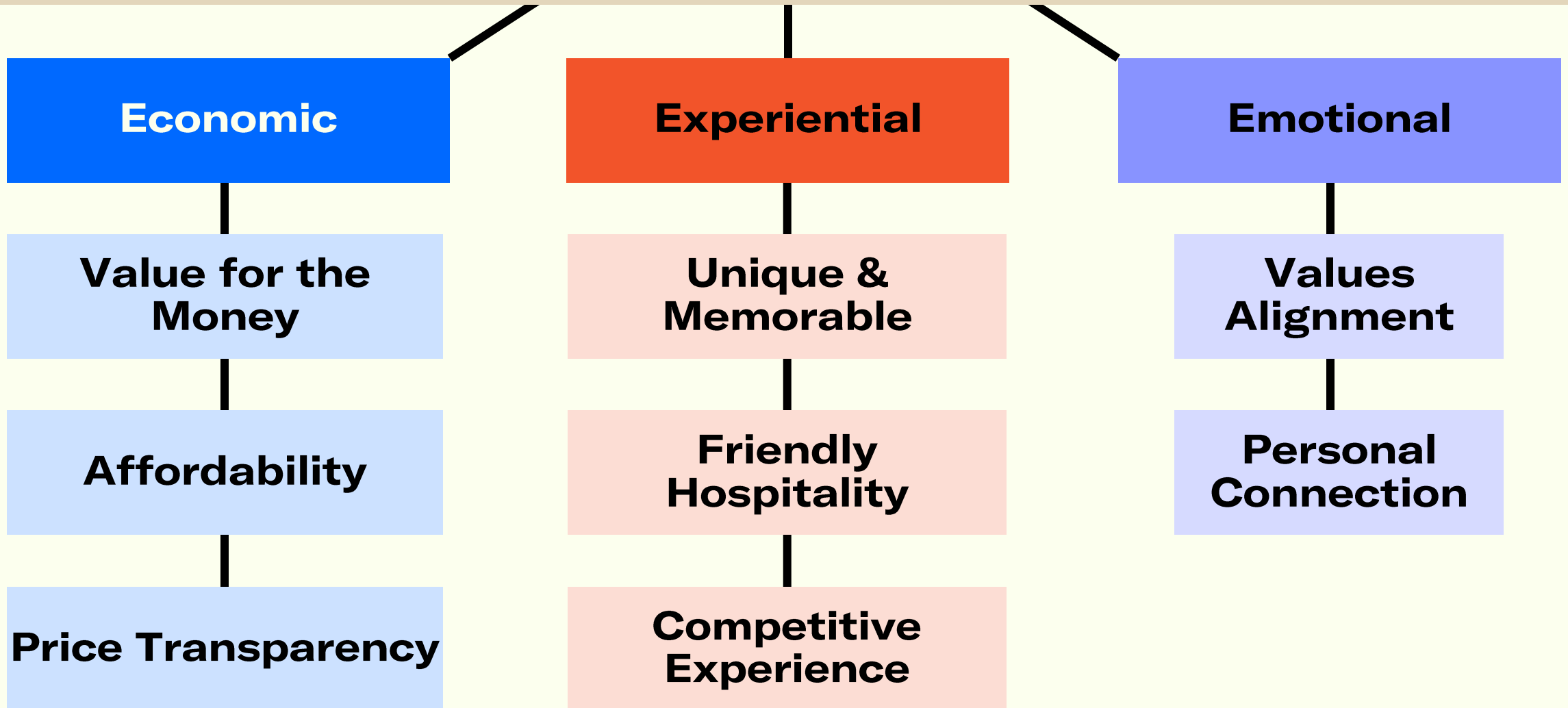
- Research fielded every month with fresh traveler perceptions for real-time accuracy.

Evidence-Based Strategy

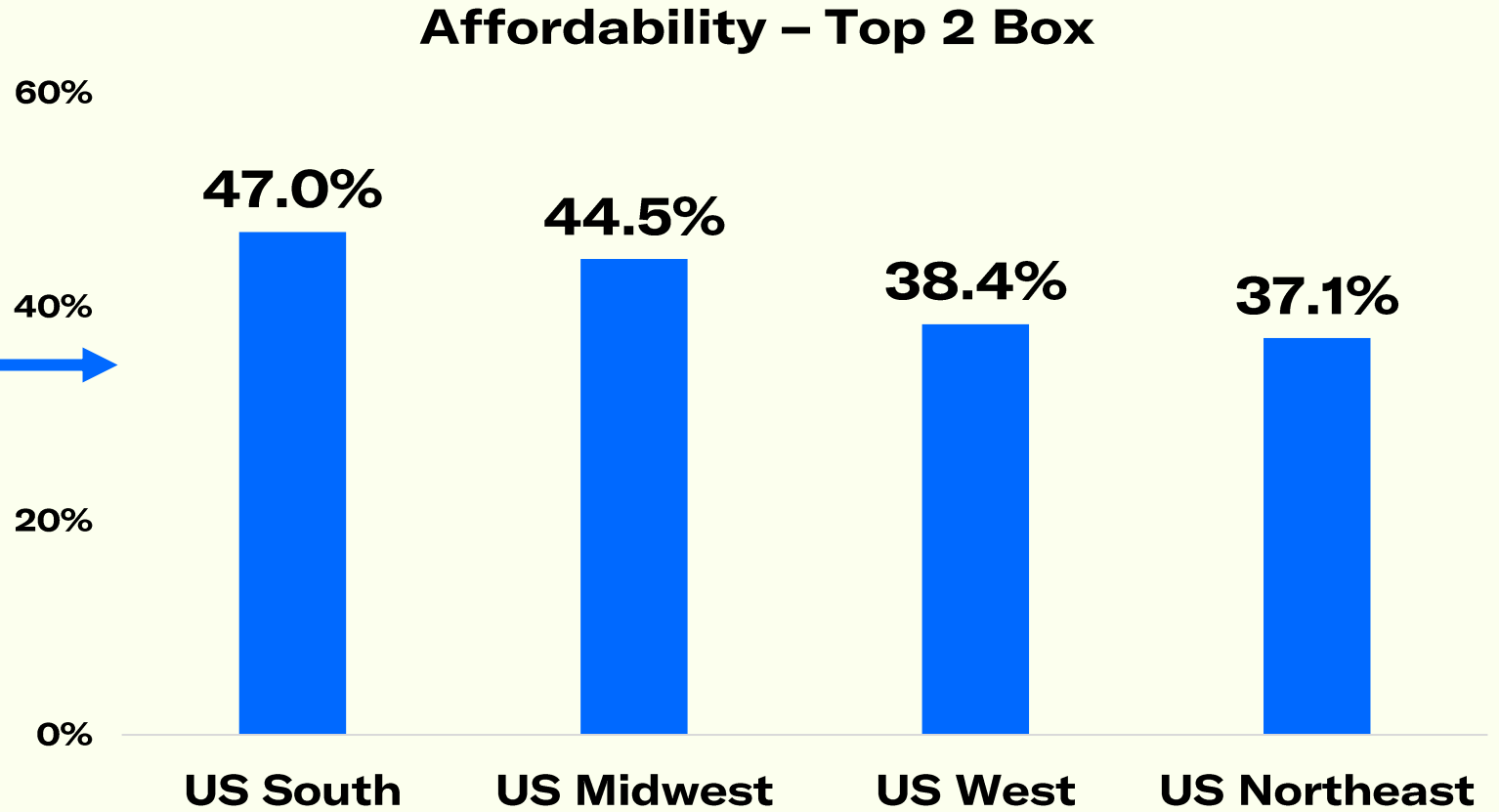
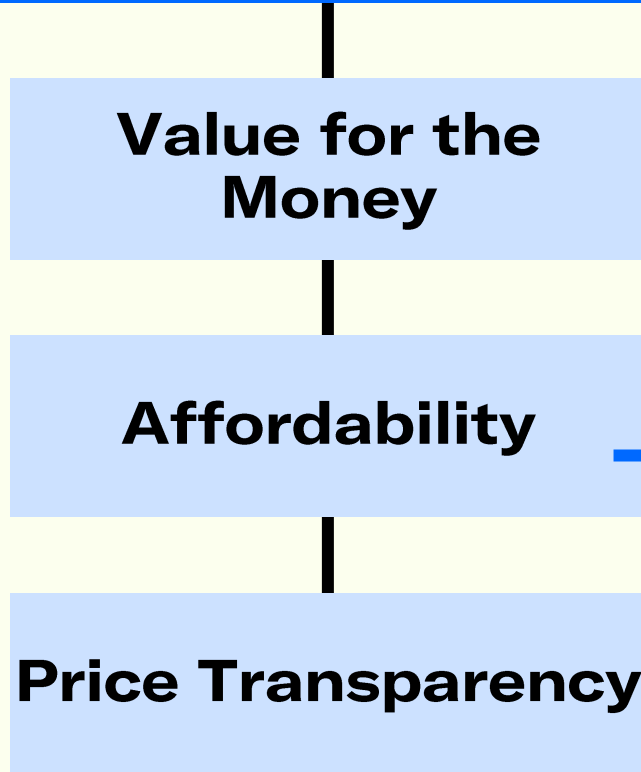
- Results are built from specific variables measuring affordability, unique experiences and personal connection.



Destination Value Index

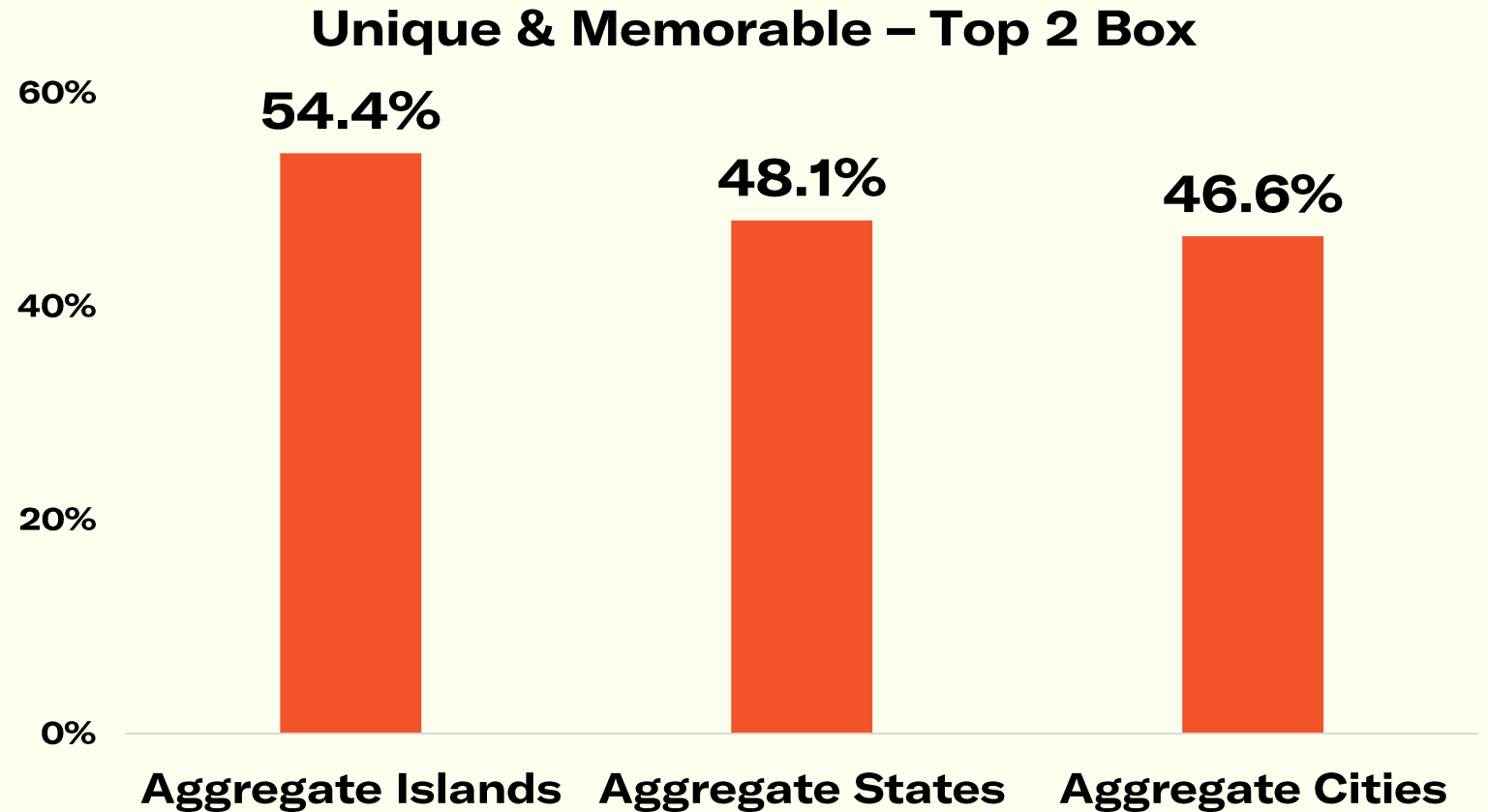
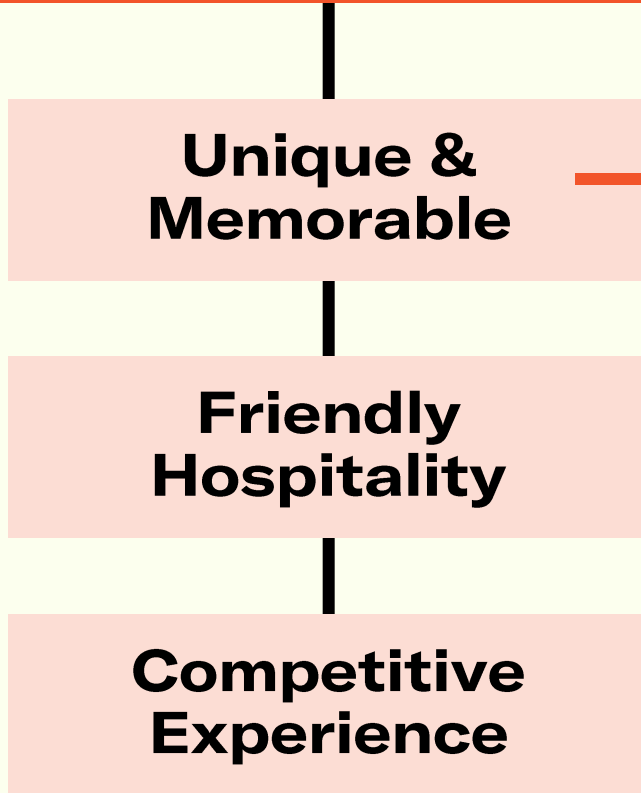


Economic



Question: For me, Destination would be an affordable place to visit.

Experiential



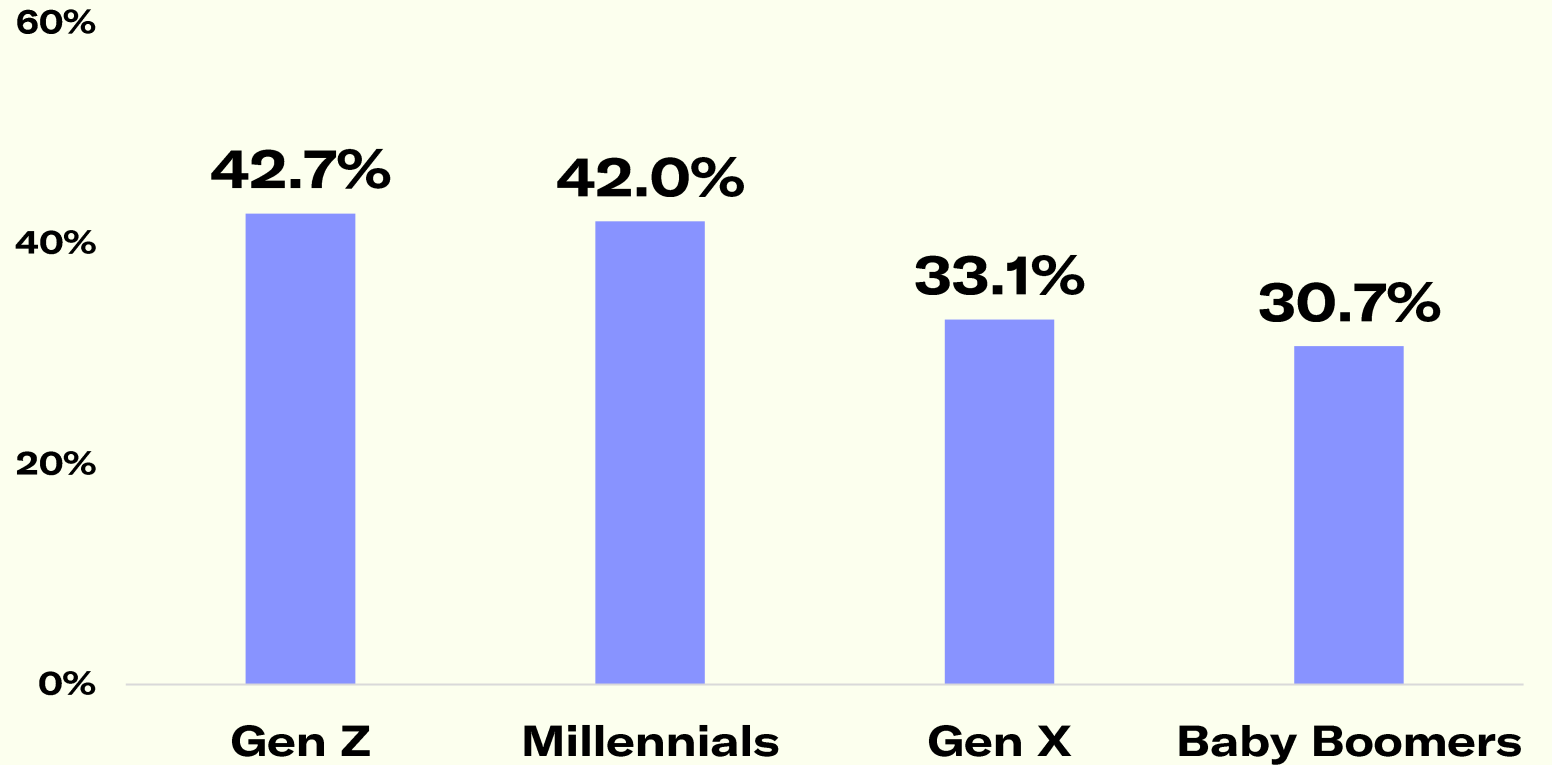
Question: I expect a trip to Destination would provide memorable or unique experiences that would feel worth the cost.

Emotional

Values Alignment

Personal Connection

Values Alignment – Top 2 Box



Question: I expect I would feel good knowing that traveling to Destination would allow me to spend money in ways that align with my personal values

Destination Value Index

Year: 2026 YTD | Destination Type: States | Destination: Georgia | Competitive Set: (All)

Future Partners Destination Value Equity Index is made up of the following eight key elements, which are considered as the important components of a destination's value equity. These factors are then utilized to calculate an index score on a 100-pt scale.

Economic

- Worth**
The extent to which travelers believe a trip to the destination offers good overall value for the money.
- Affordability**
The degree to which travelers perceive the destination as financially accessible for a leisure trip.
- Transparency**
The expectation that prices and fees at the destination will be clear, upfront, and free of unexpected costs.

Experience

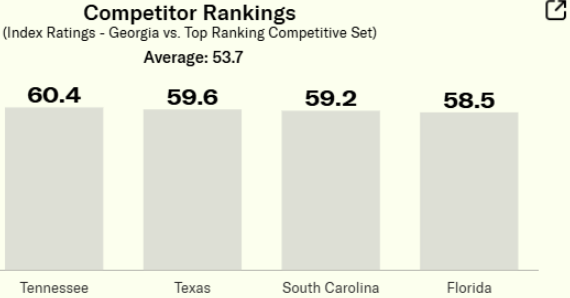
- Memorability**
The expectation that the destination will deliver unique and memorable experiences that feel worth the cost.
- Hospitality**
The extent to which the friendliness and helpfulness of staff and locals are expected to enhance the overall value of the trip.
- Competitiveness**
The degree to which travelers believe the destination offers a better overall experience compared to other destinations for the price.

Emotion

- Alignment**
The extent to which spending at the destination is expected to align with a traveler's personal values.
- Connection**
The degree to which travelers feel a personal connection to the destination.

55.1

Georgia
(-2.6pts YOY)



*Barometer values indicate how each destination performs relative to the selected competitive set, with 50 representing average performance.



Destination Value Index

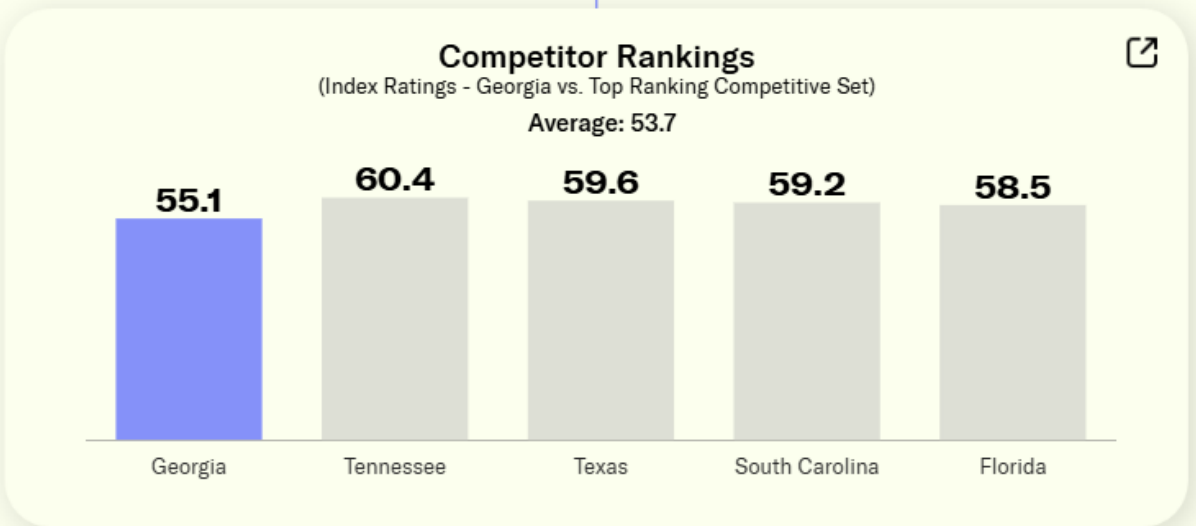
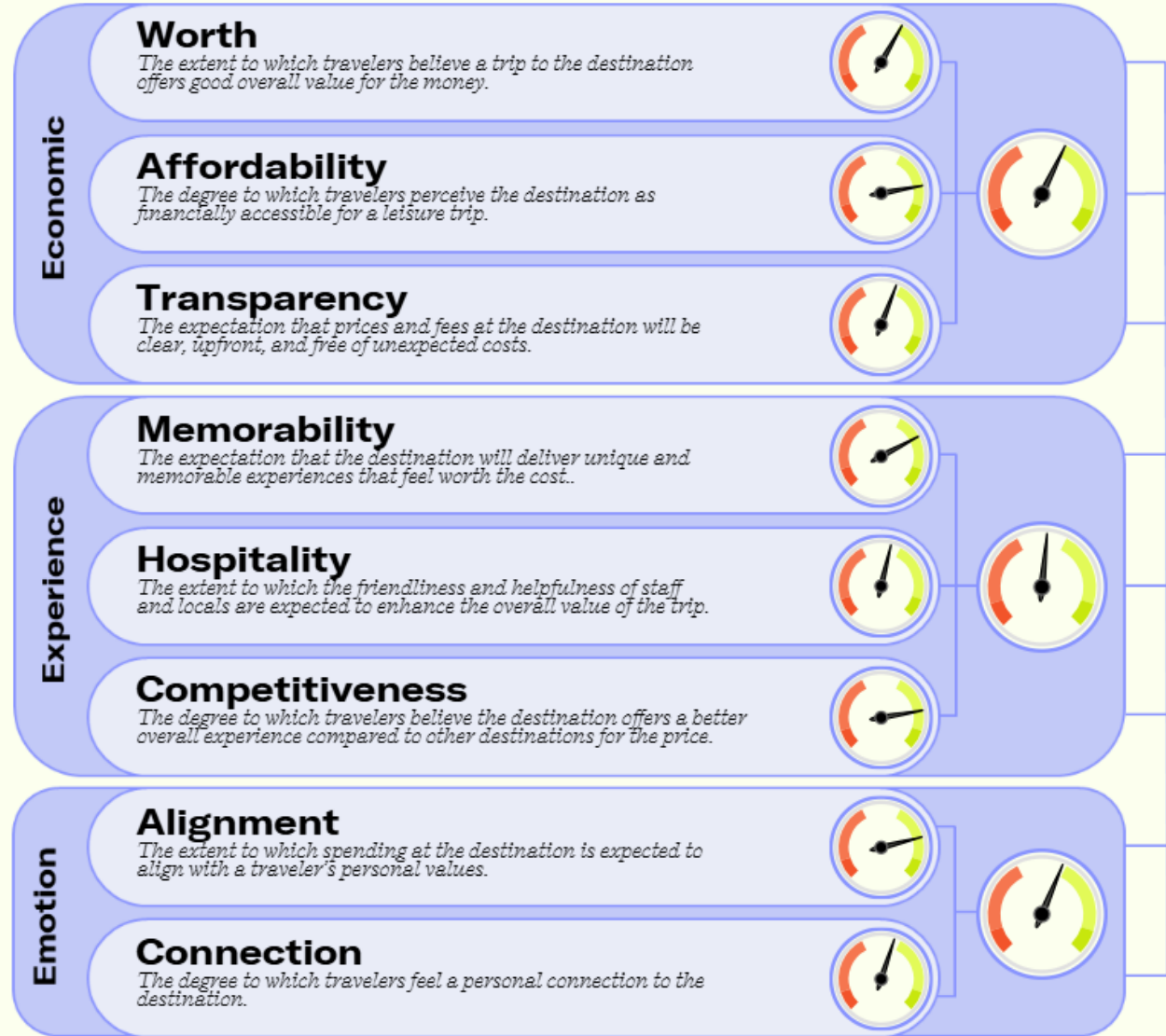
Year
2026 YTD

Destination Type
States

Destination
Georgia

Competitive Set
(All)

Future Partners Destination Value Equity Index is made up of the following **eight key elements**, which are considered as the important components of a destination's value equity. These factors are then utilized to calculate an index score on a 100-pt scale.



*Barometer values indicate how each destination performs relative to the selected competitive set, with 50 representing average performance.

Future Partners' Destination Value Index: Decoding Traveler Value to Beat the Competition

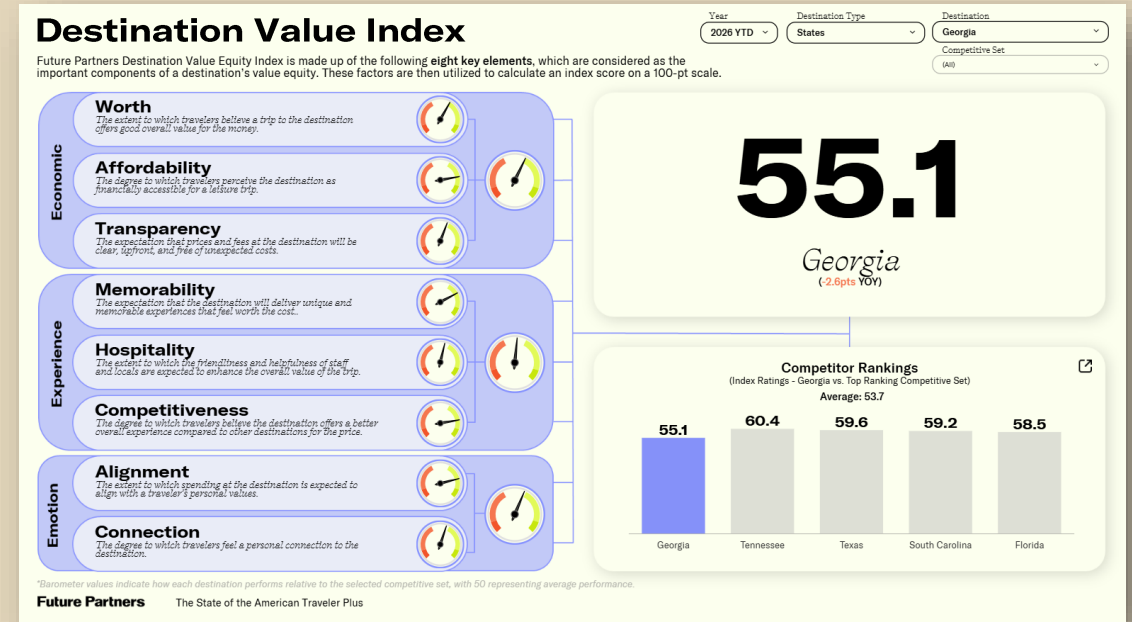
Destination Benchmarking
Strategic Segmentation
Deep Demographic Precision

The Three Dimensions of Value:
Economic, Experiential, Emotional

The Value of Timely Data:
Research fielded every month with fresh traveler perceptions for real-time accuracy.

Evidence-Based Strategy:
Results are built from specific variables measuring affordability, unique experiences and personal connection.

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The latest *The State of the American Traveler* findings deliver a nuanced but ultimately resilient message for the travel industry. Yes, recession expectations have spiked, and TSA disruptions and geopolitical tensions have added a new layer of traveler anxiety that cannot be dismissed.

But what we see behaviorally continues to tell a different story: **summer is booked, budgets are at record highs, and the majority of American travelers have already demonstrated that travel is one of the last things they cut.**



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3 Continents
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United Kingdom

Asia-Pacific:

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