

The State of the American Traveler

May Edition



Opportunity powered by *Insight*

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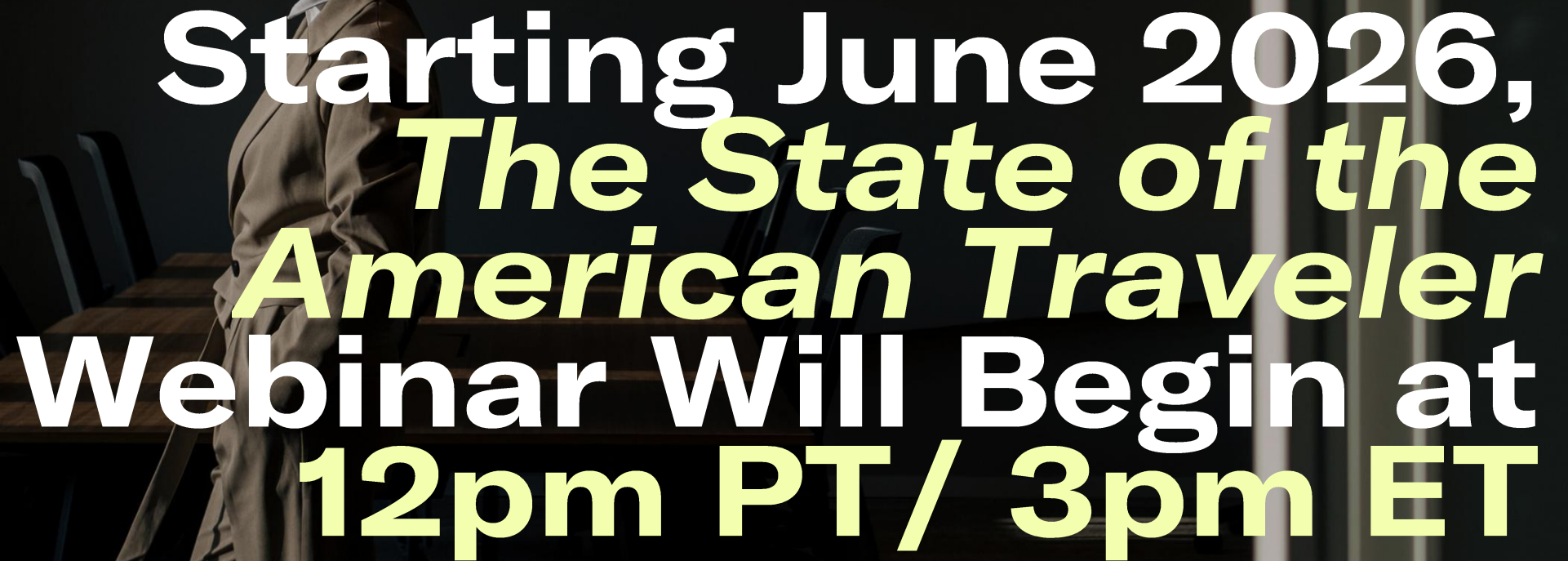
Shaping strategies for travel brands and
tourism leaders that capture *hearts,*
minds and *market share*

Future Partners

*Bringing the future of travel
within reach*

Future Partners

Our Monthly Webinar
Start Time is
Changing!



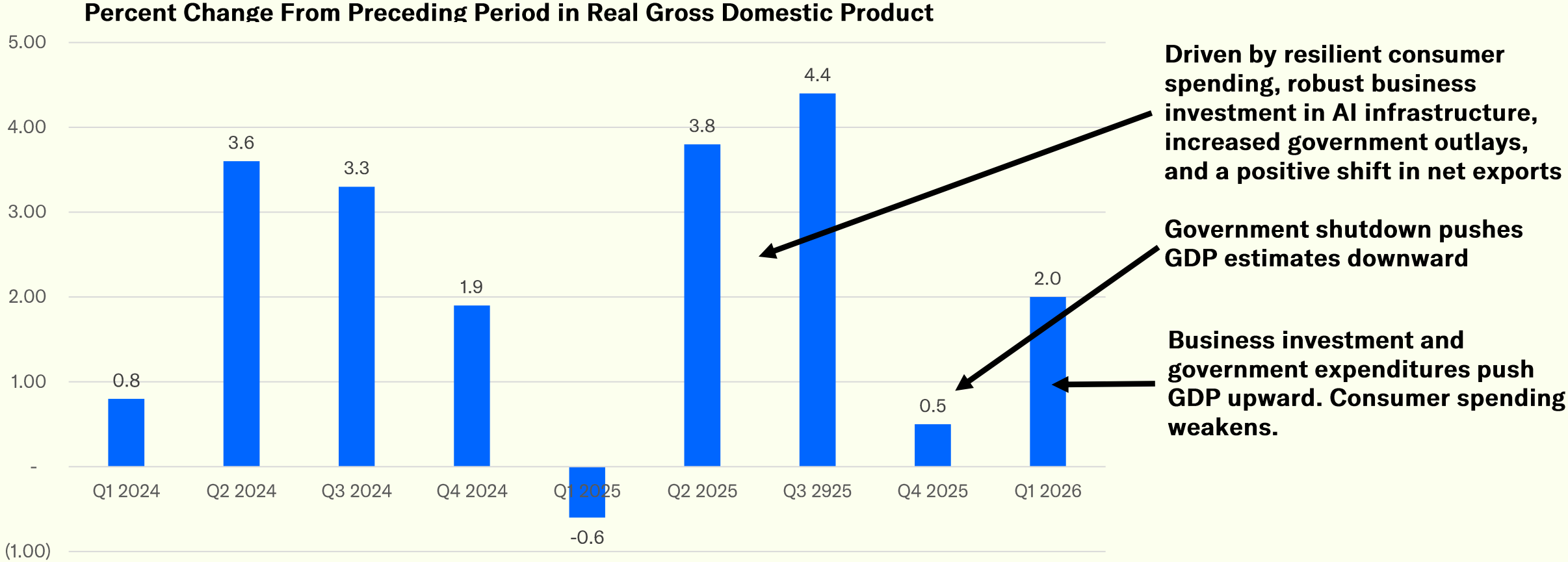
Starting June 2026,
*The State of the
American Traveler*
Webinar Will Begin at
12pm PT / 3pm ET



Signals from Complementary Data

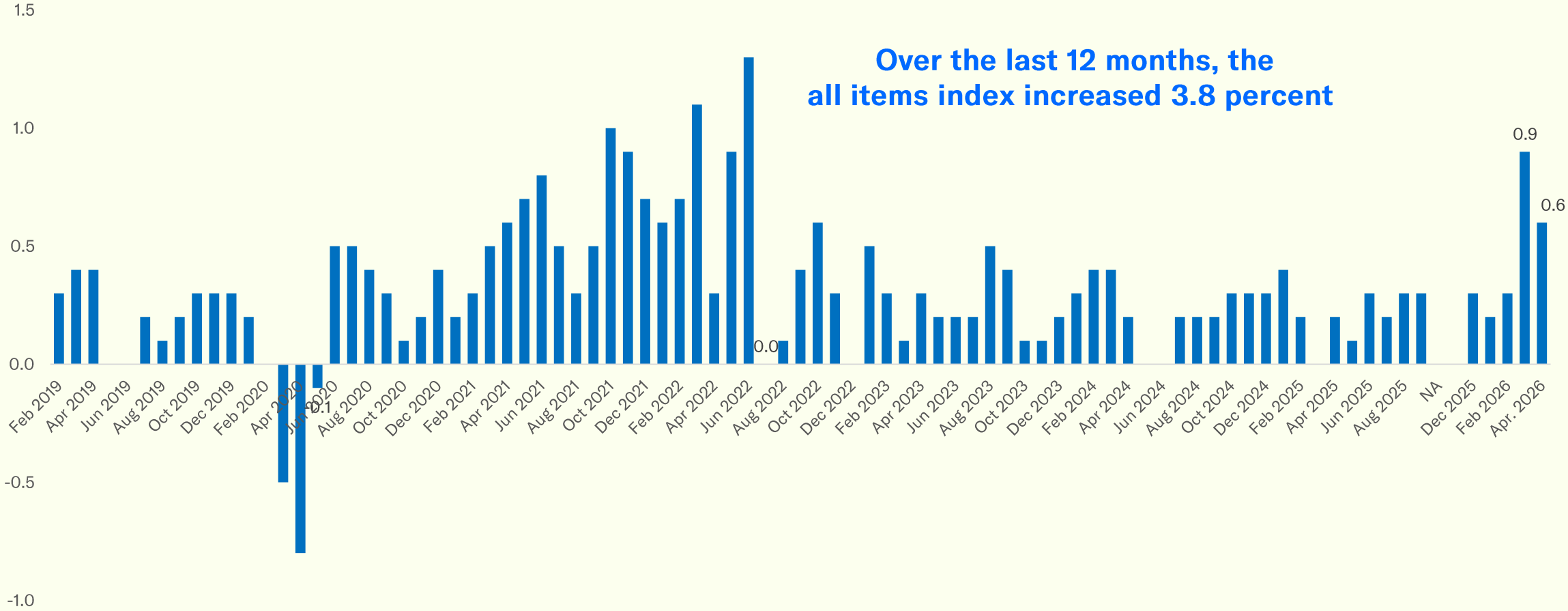


Real Gross Domestic Product (GDP) Increased at an Annual Rate of 2.0 Percent in the First Quarter of 2026



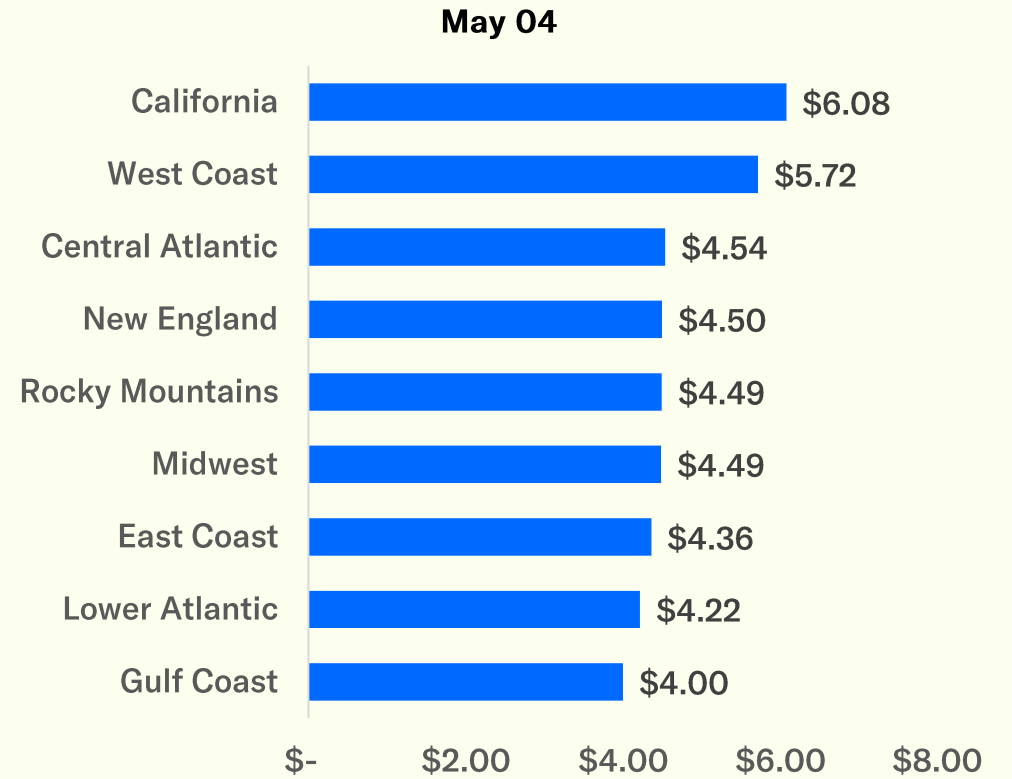
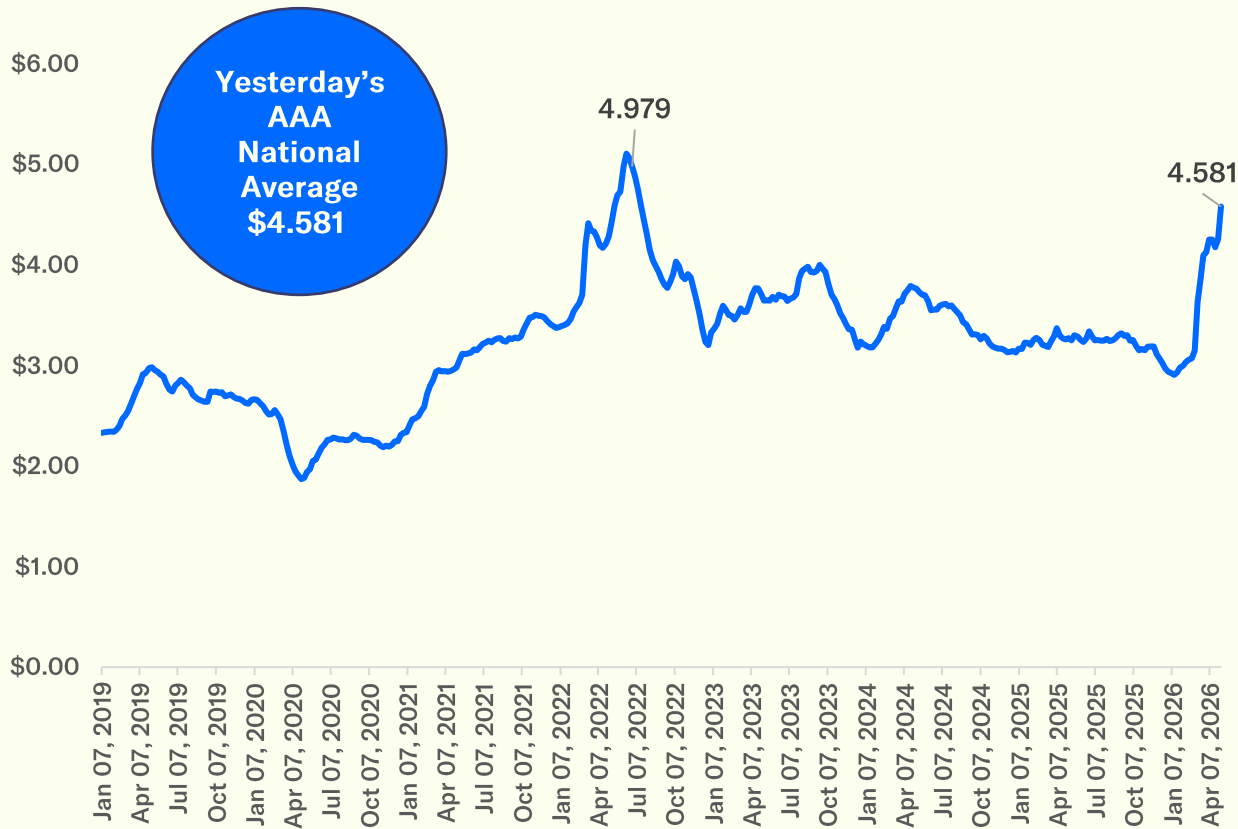
The Consumer Price Index for All Urban Consumers Increased 0.6 percent in April

Consumer Price Index for All Urban Consumers (CPI-U) 1-Month Percent Change



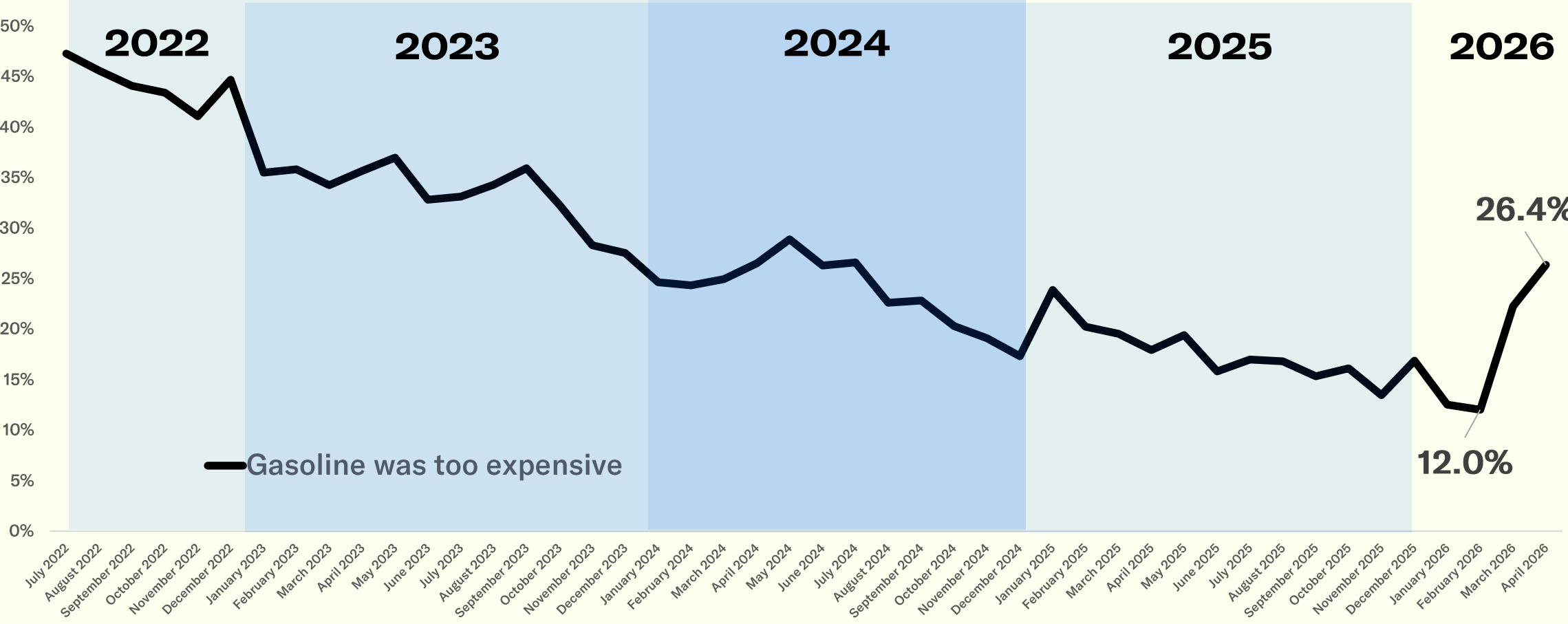
Gasoline Prices Reached \$4.58/Gallon Yesterday

Weekly U.S. All Grades All Formulations Retail Gasoline Prices (Dollars per Gallon)



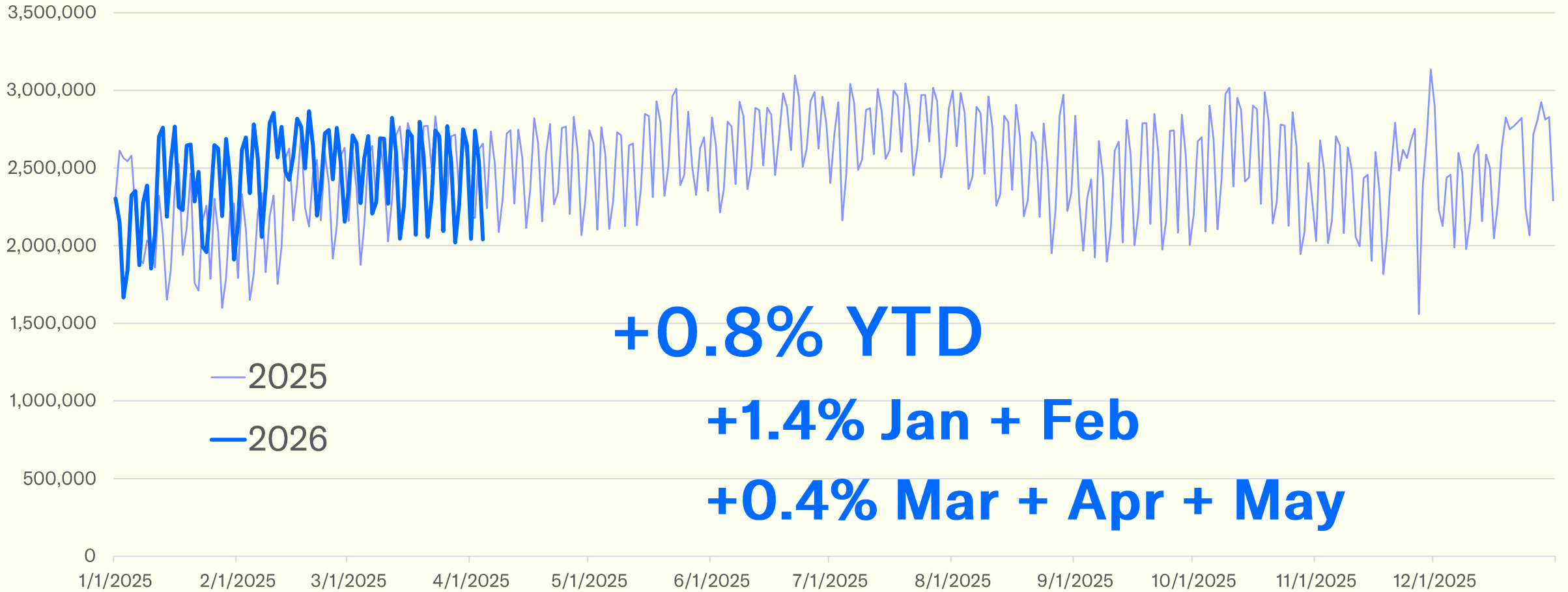
Gas Prices as a Deterrent to Travel is on the Rise

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)



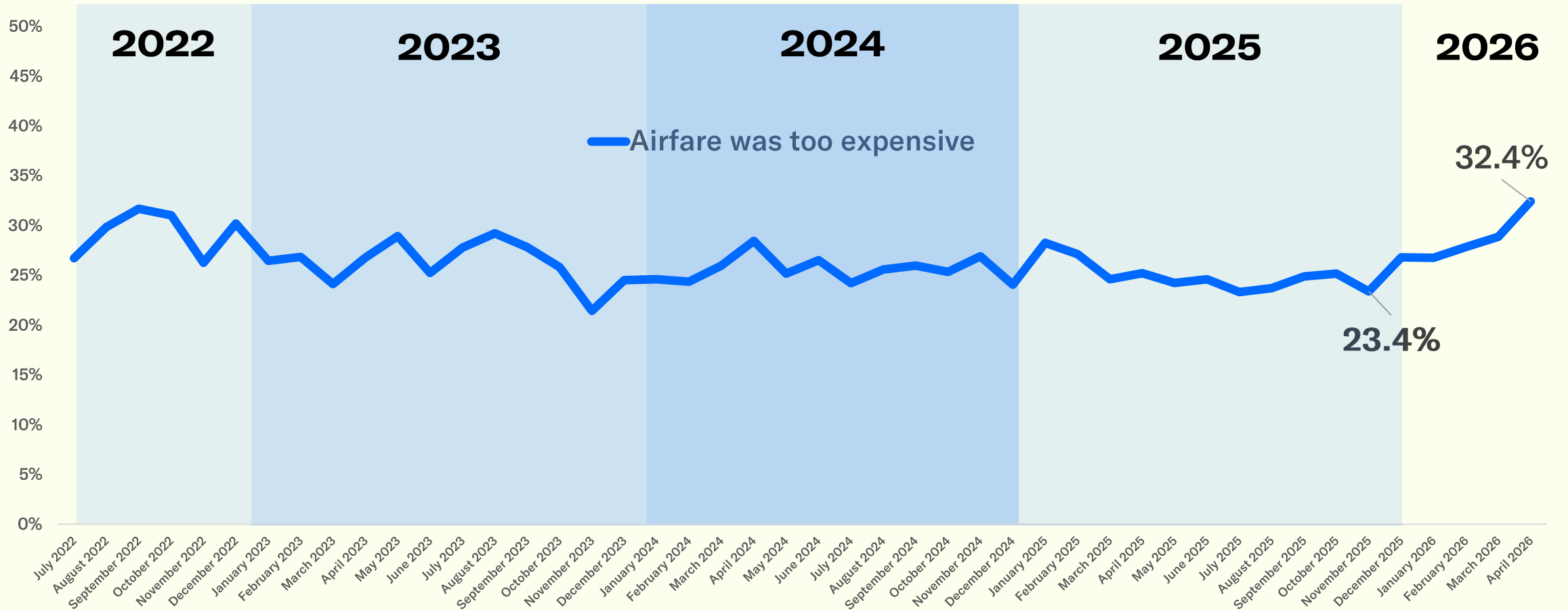
Year-Over-Year Air Travel Growth Decelerates

2026 and 2025 TSA checkpoint travel numbers



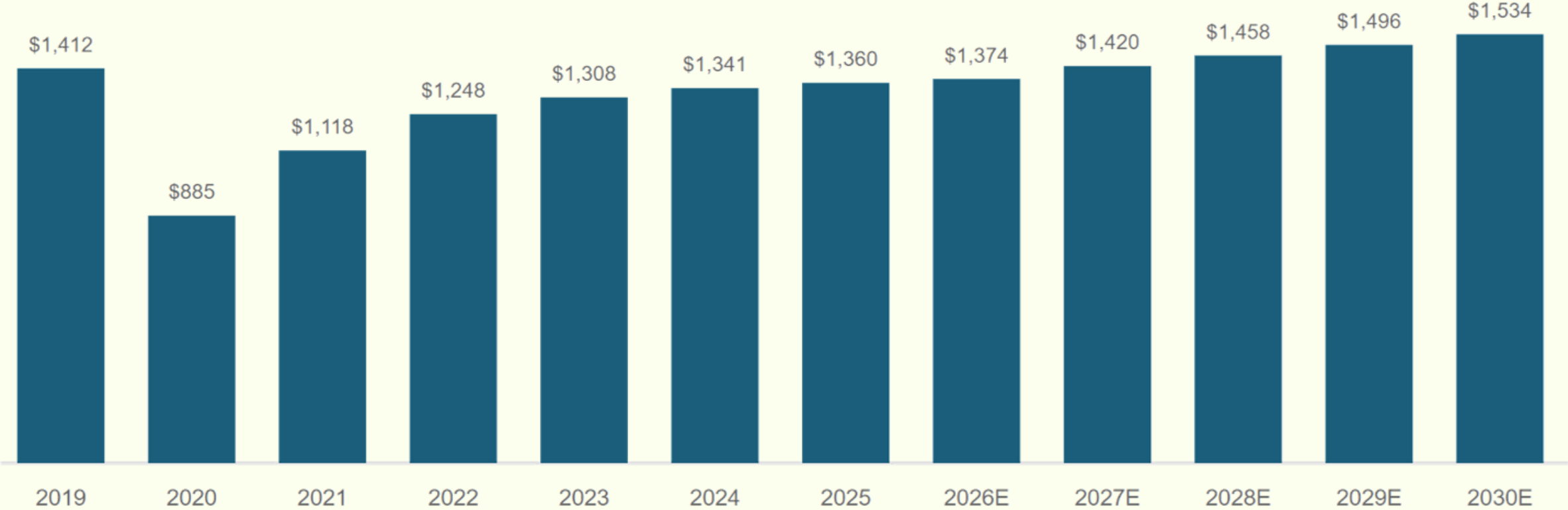
Airfare Cost as a Travel Deterrent is on the Rise

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)



U.S. Travel Spending

(Inflation Adjusted 2025 Dollars, in Billions)



Source: Tourism Economics, U.S. Travel Association

US Travel Forecasts

- U.S. travel spending will reach a record **\$1.37 trillion in 2026** (and climb to \$1.42 trillion in 2027.)
- **Domestic travelers** will account for **87 percent of all travel spending**.
- International inbound travel remains a major hurdle
- **Inbound visitation declined in 2025** for the first time since 2020, falling 6.3 percent to 67.9 million travelers. International visitor spending also dropped 3.2 percent to \$173 billion.
- **International travel recovery is not expected** to return to 2019 levels **until 2029**

AAA Memorial Day Forecasts:

A record 45 million Americans will travel this Memorial Day weekend, a 0.4% increase from last year.

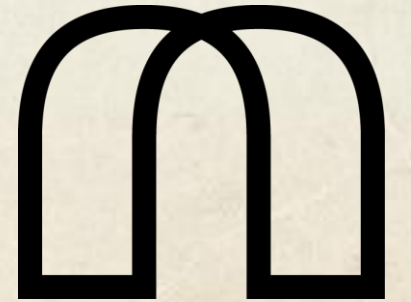
Methodology

- 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: [April 16 – May 4](#)
- 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

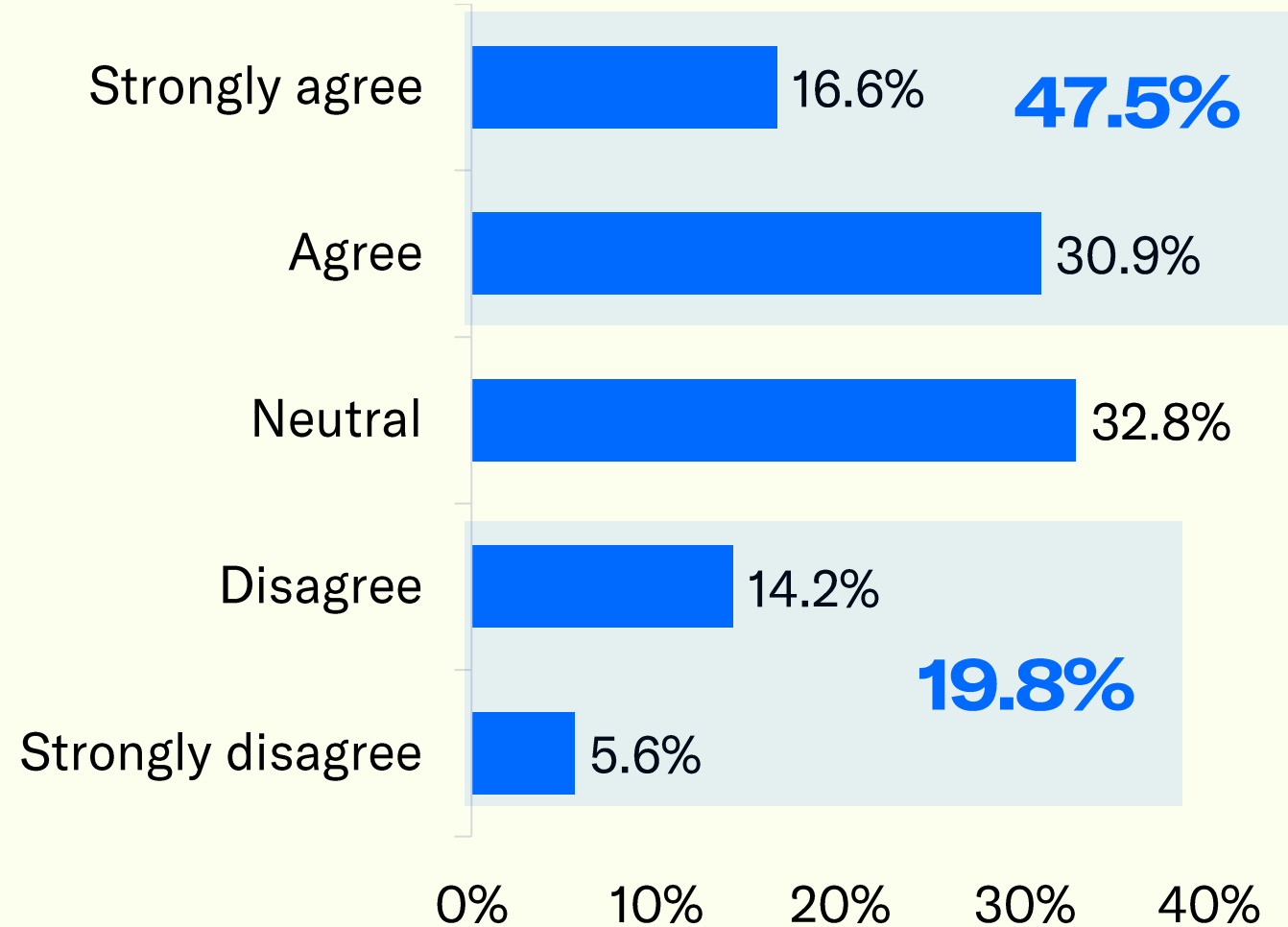


How are Americans Feeling About the Economy?



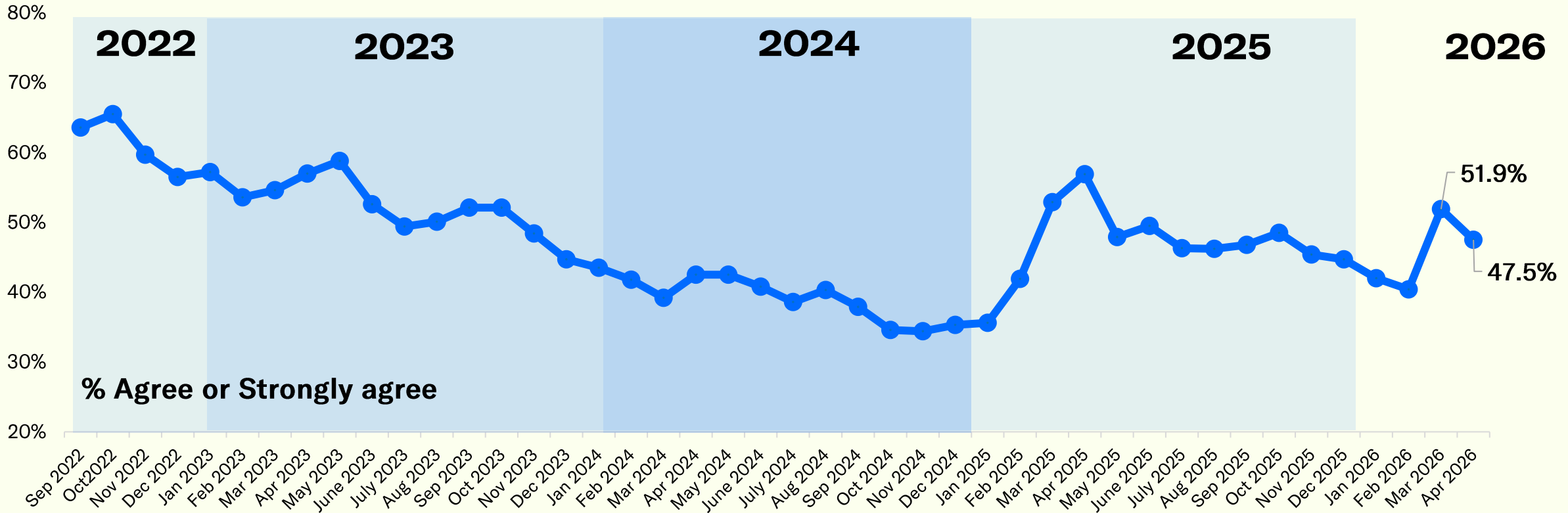
Just Under Half of Americans Expect a Recession in the Next 6 Months

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



Recession Fears Inch Down after Last Month's Spike

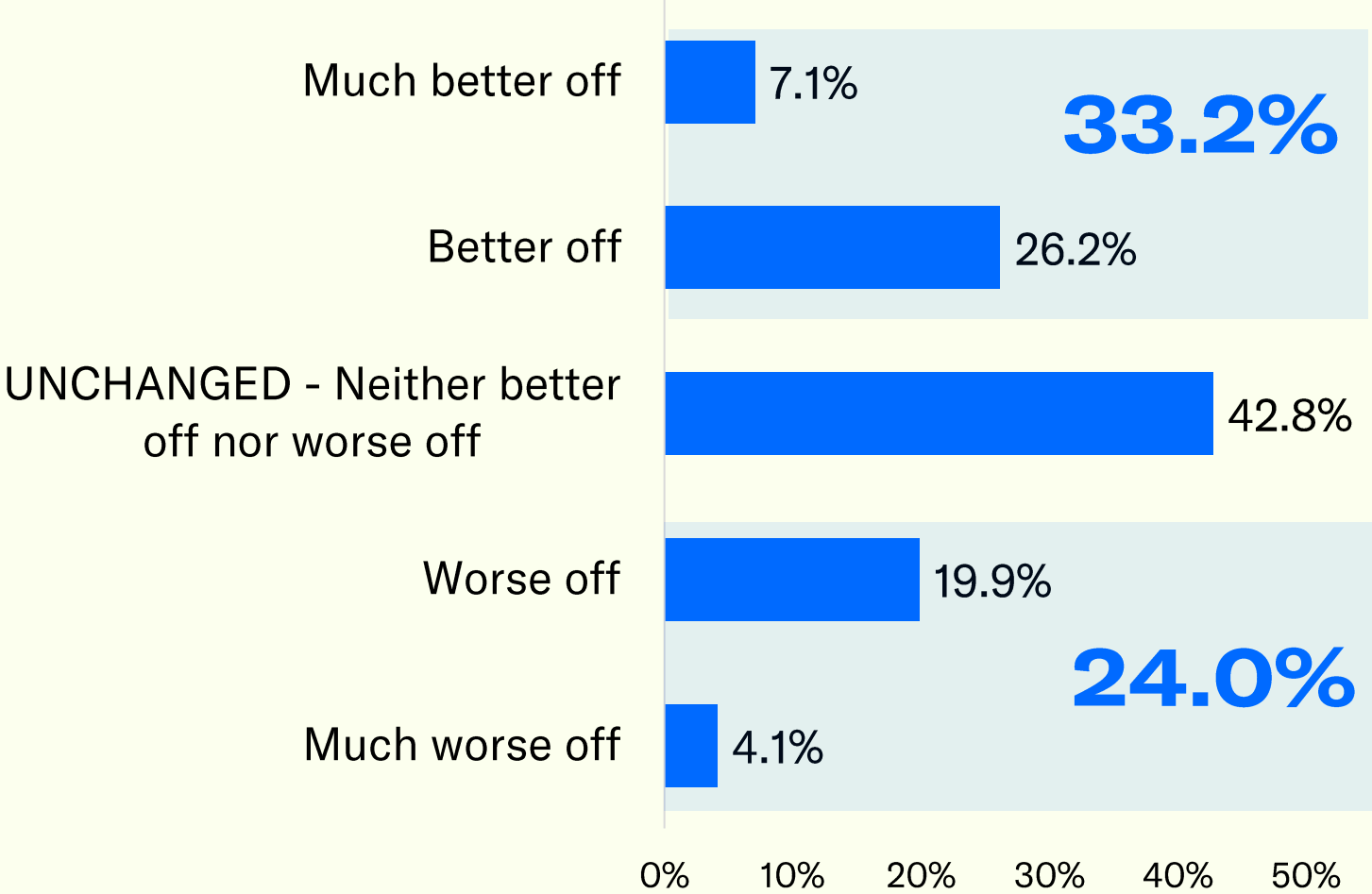
Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Despite Recession Concerns, More Americans Feel Financially Better Off than Worse Off

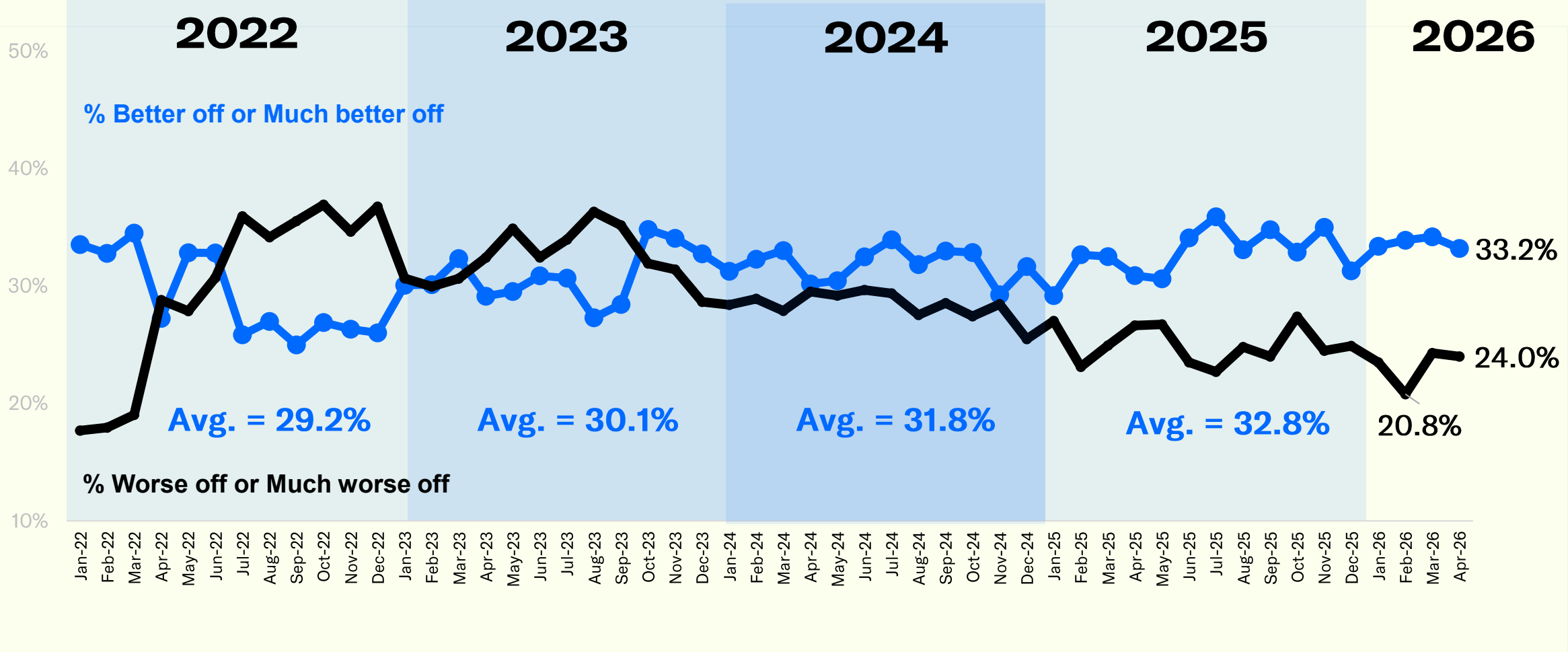
Question:

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



Household Financial Sentiment Shows Continued Stability

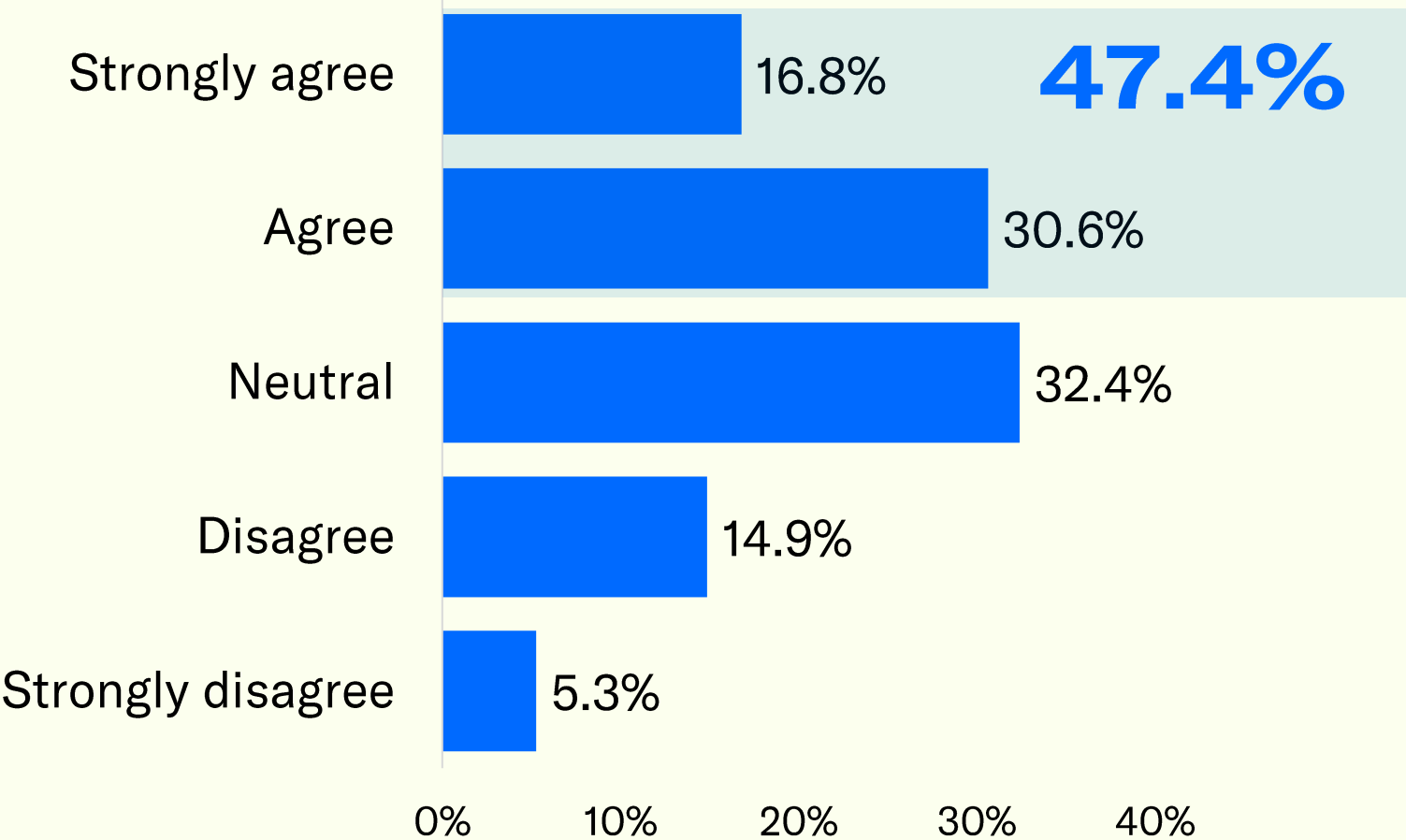
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Many Travelers are being Careful with their Money, Fearing an Economic Downturn

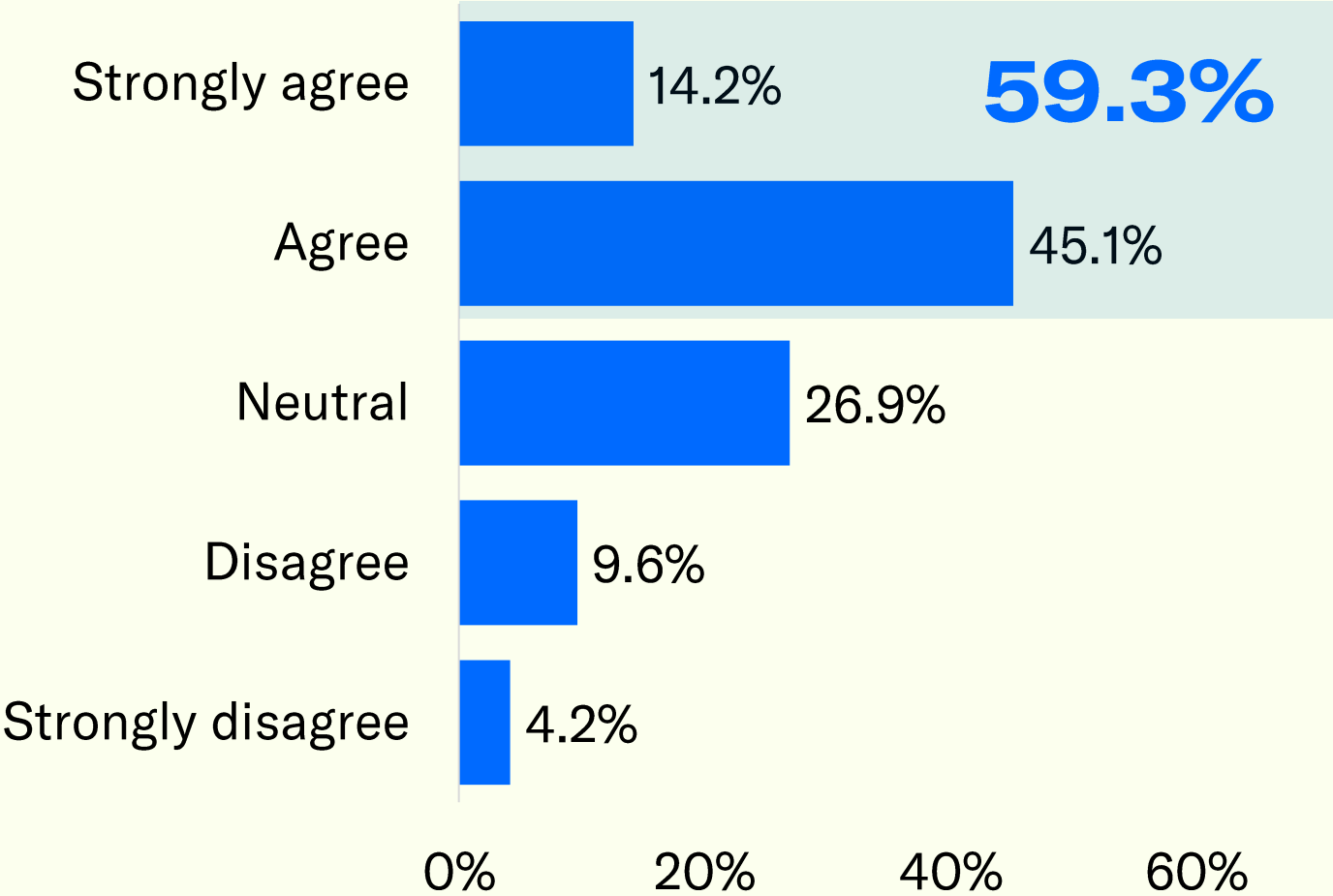
Question:

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



Still, Most Americans Agree that Travel is a Worthwhile Investment

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



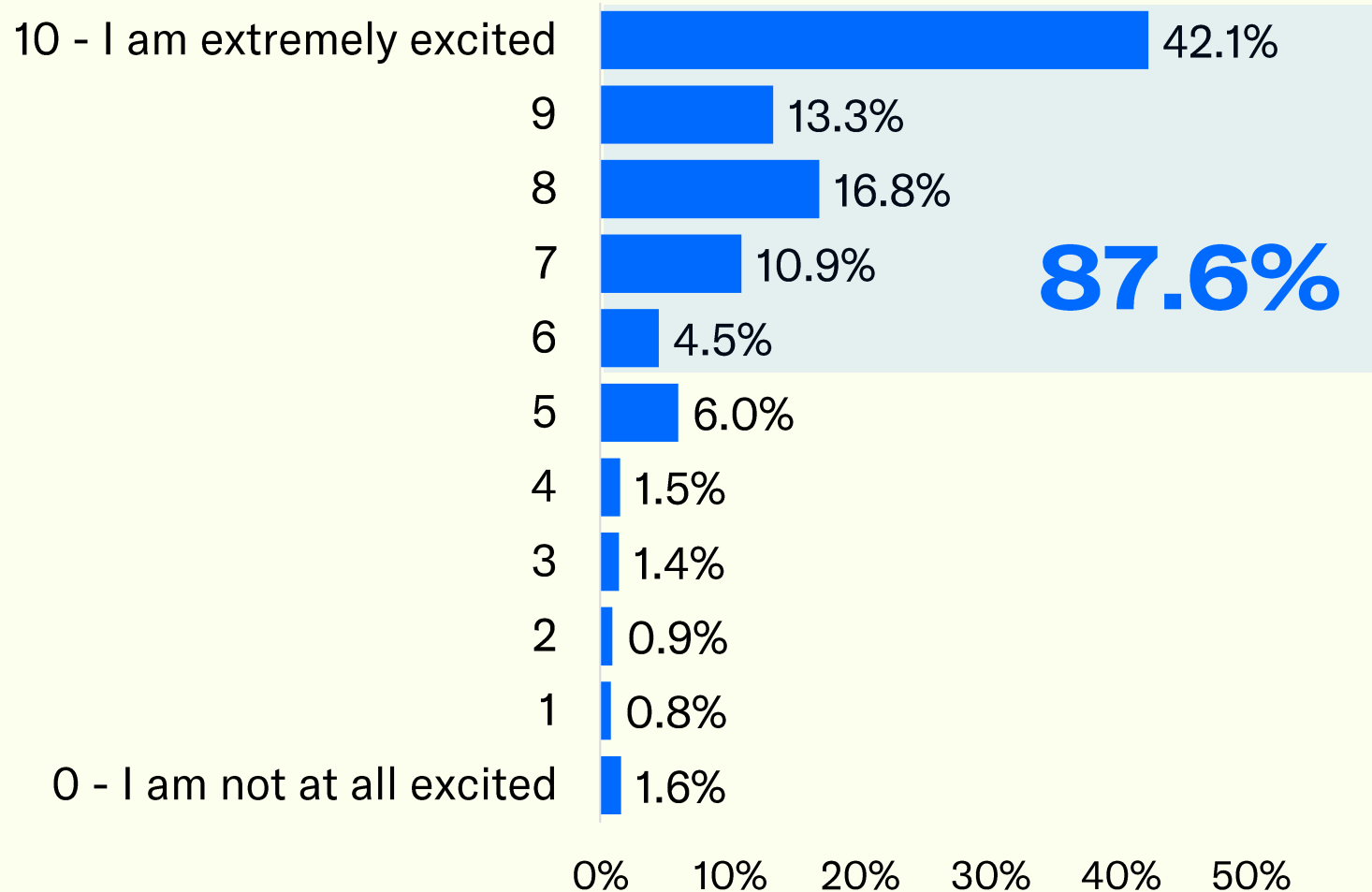


Americans' Current Travel Sentiment

Nearly 9-in-10 Travelers Rate Their Excitement for Travel High

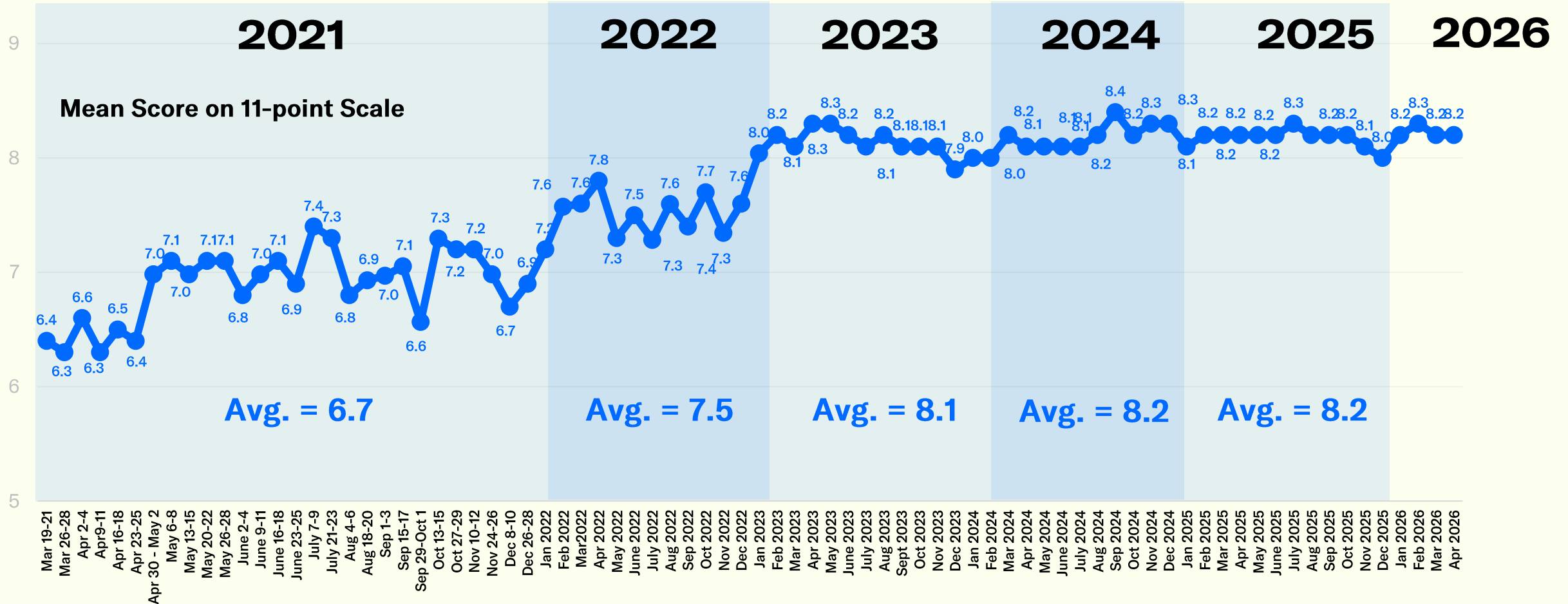
Question:

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



Excitement for Leisure Travel Remains High

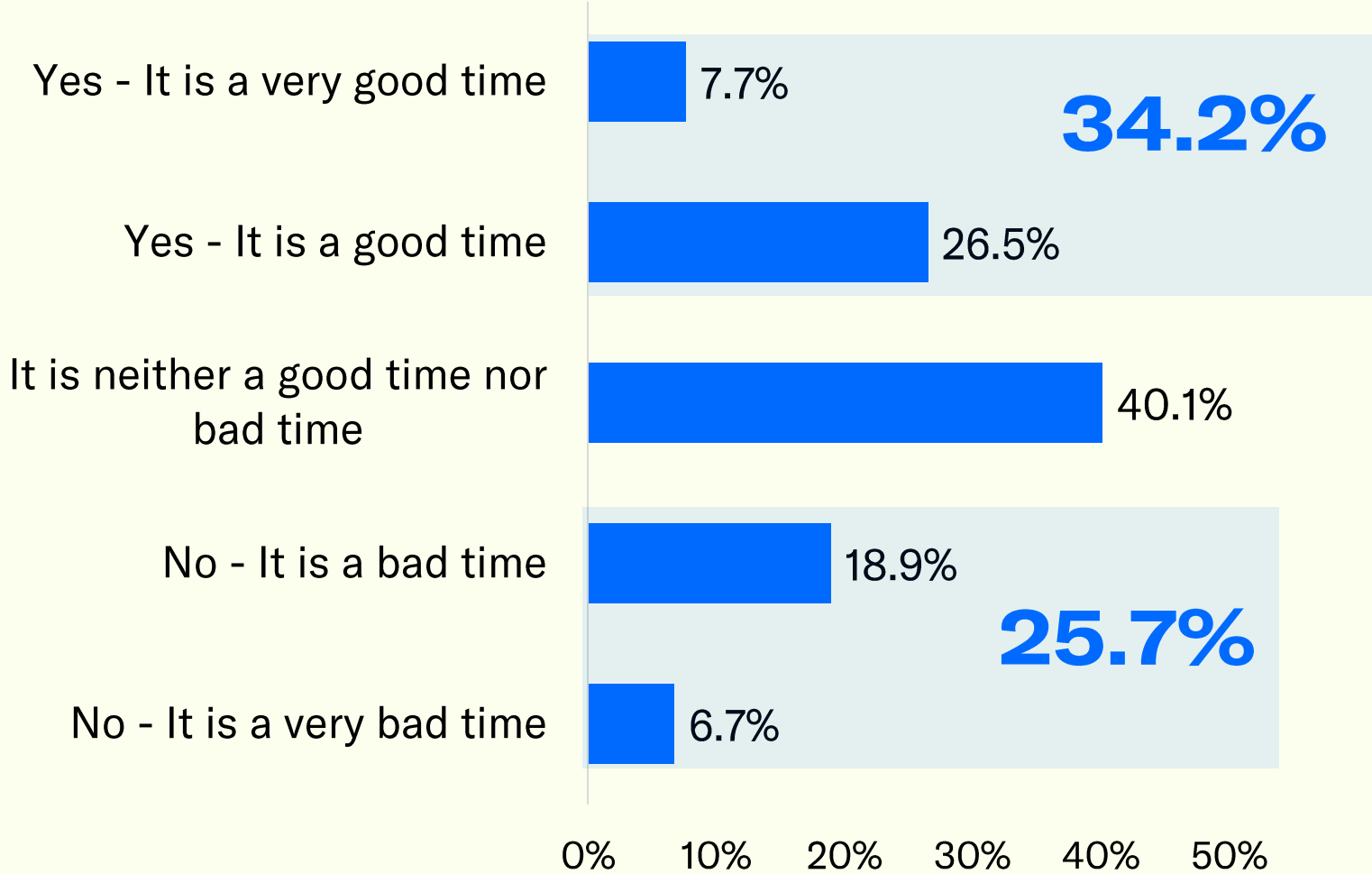
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



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

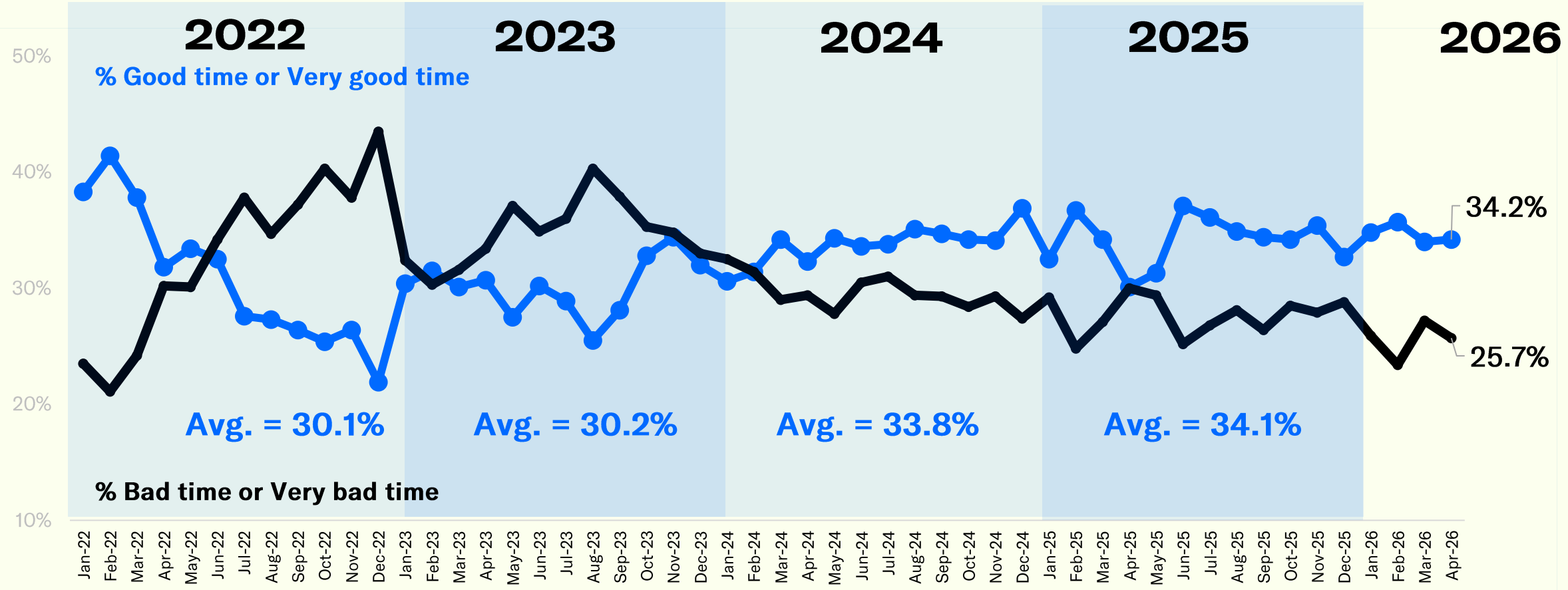
Question:

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?



Good-Time to Spend on Travel Sentiment Stable

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

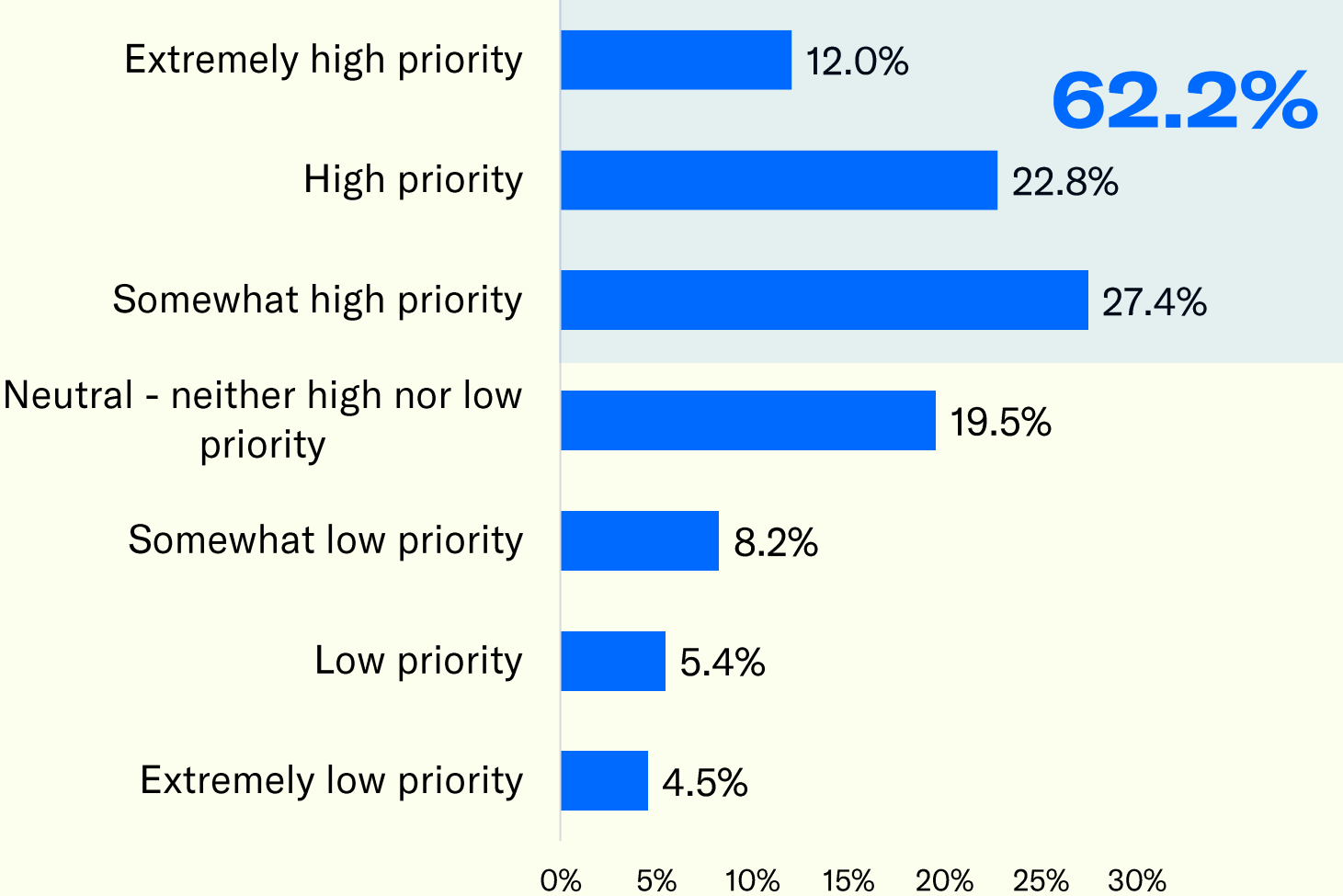


Travel Still Claims a Top Spot Among Consumer Spending Priorities

Question:

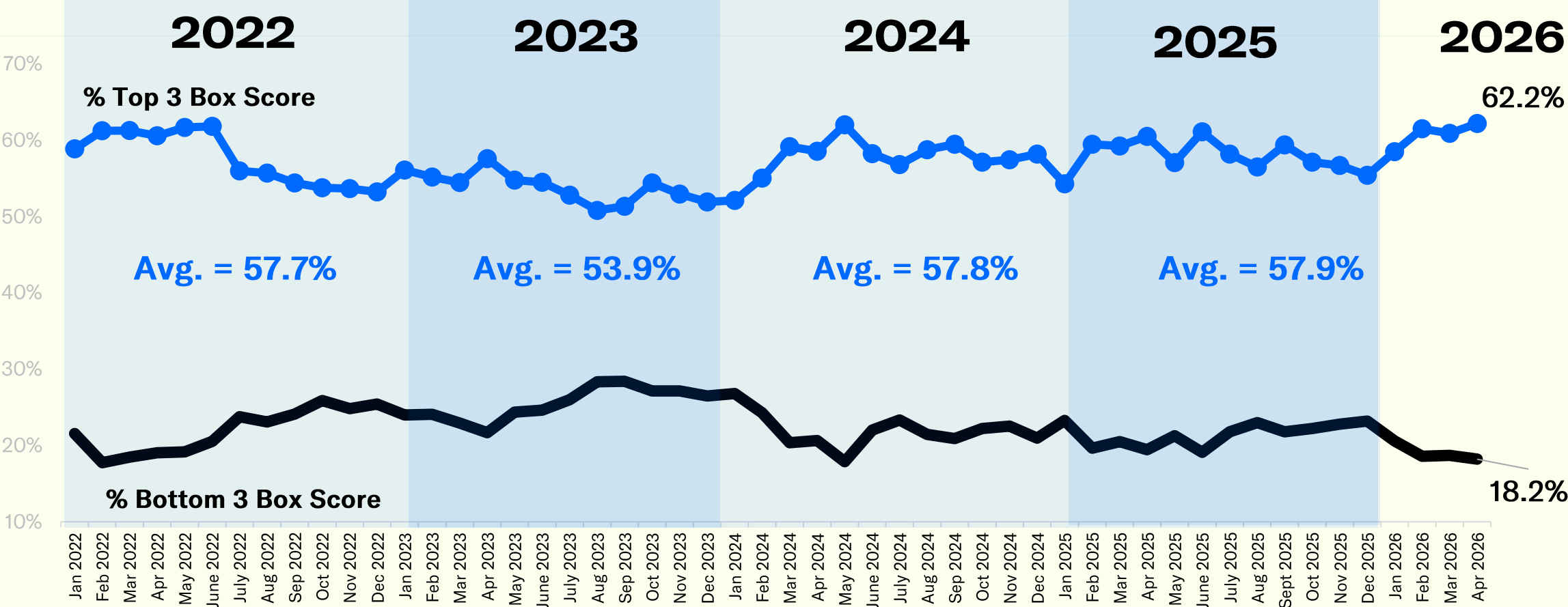
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.



Travel Spending Priority Climbs above the 4-Year Average, Hitting 62.2% This Month

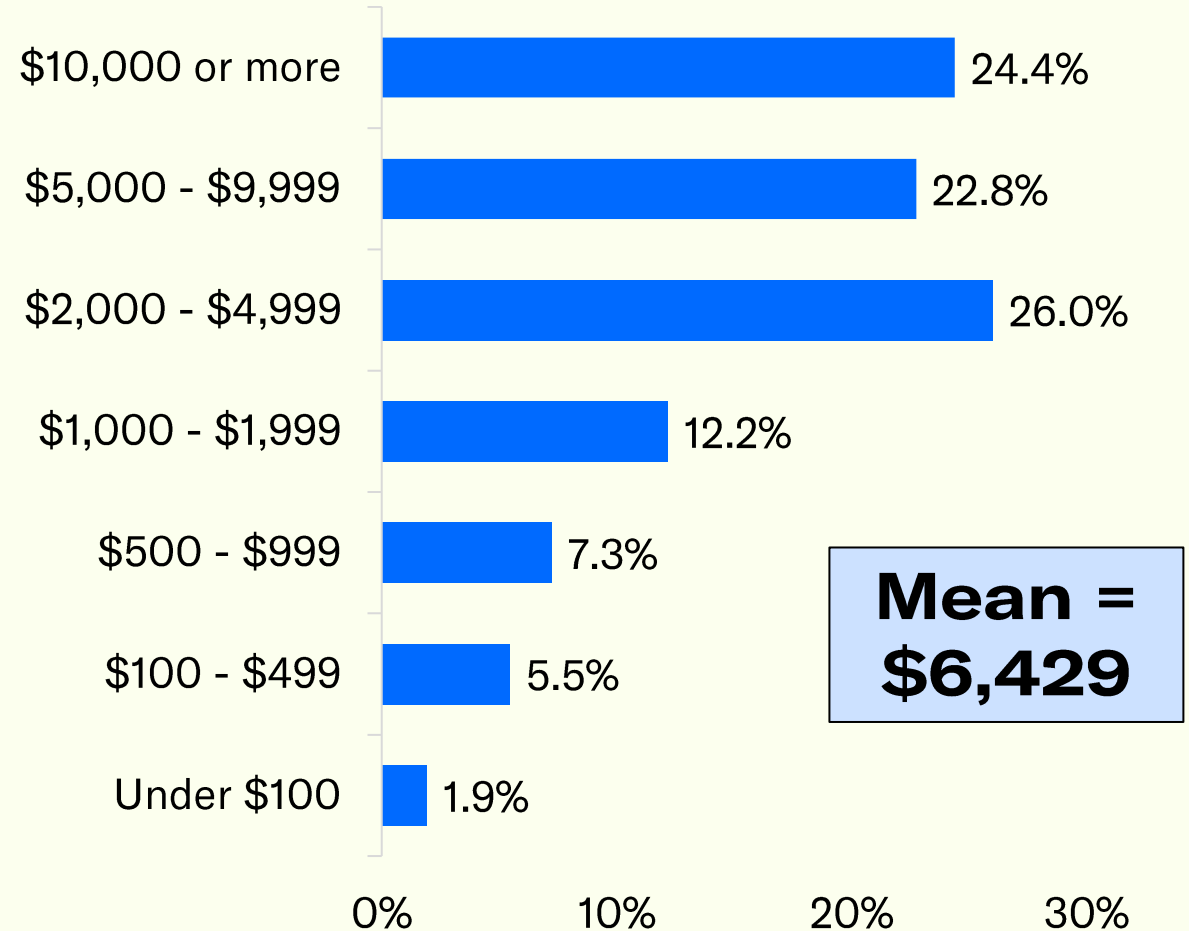
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



Average Annual Leisure Travel Budgets: \$6429

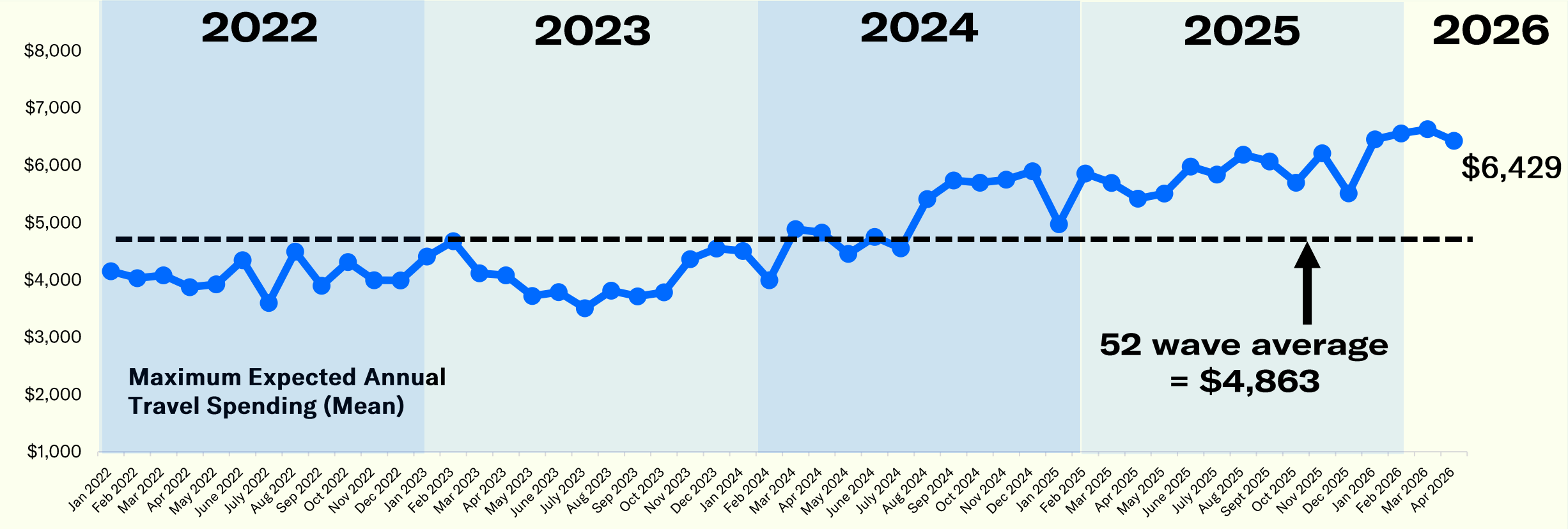
Question:

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?



Americans Continue to Have High Expectations for Travel Spending

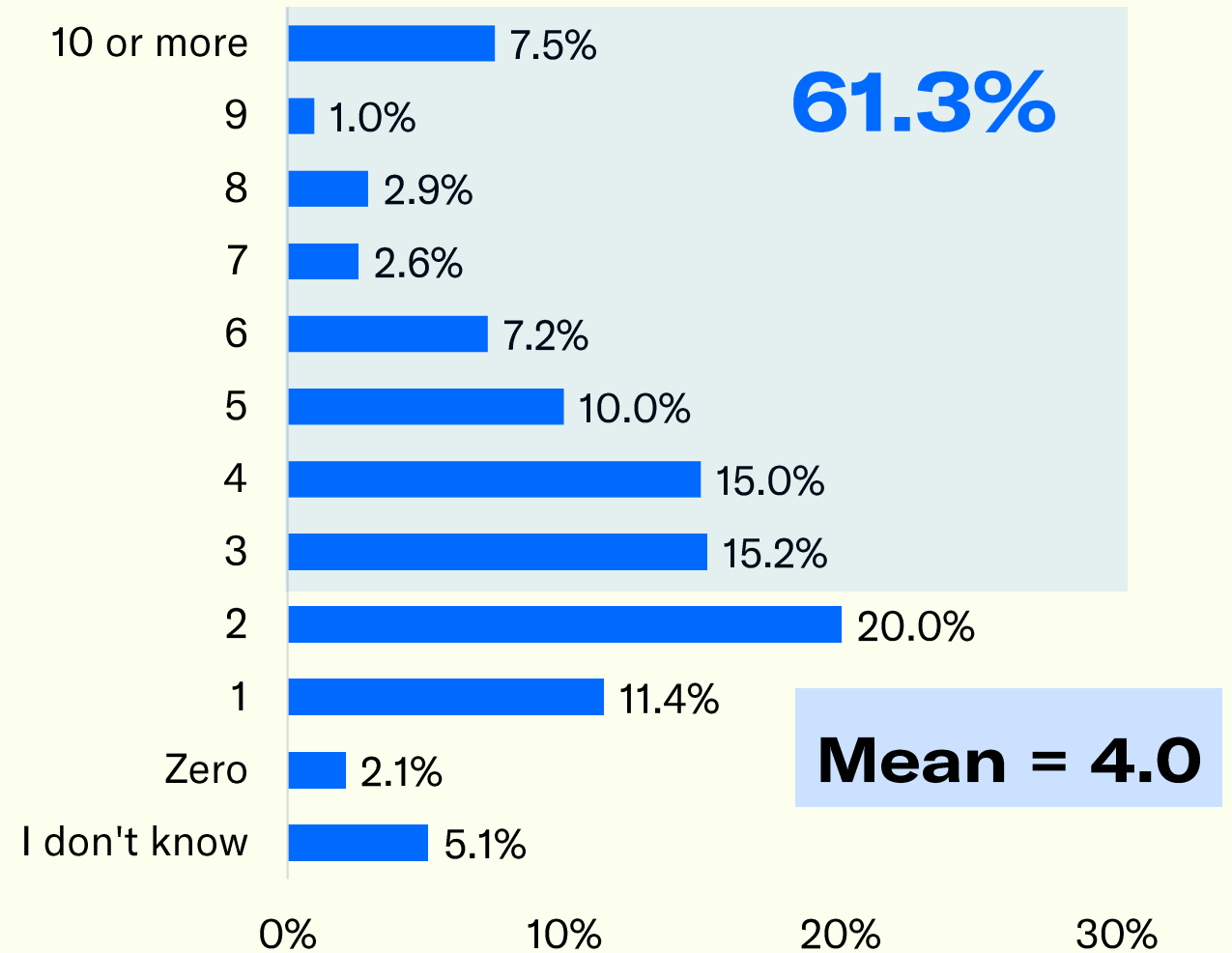
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



The Year Ahead Looks Travel Filled, with Americans Planning 4.0 Leisure Trips on Average

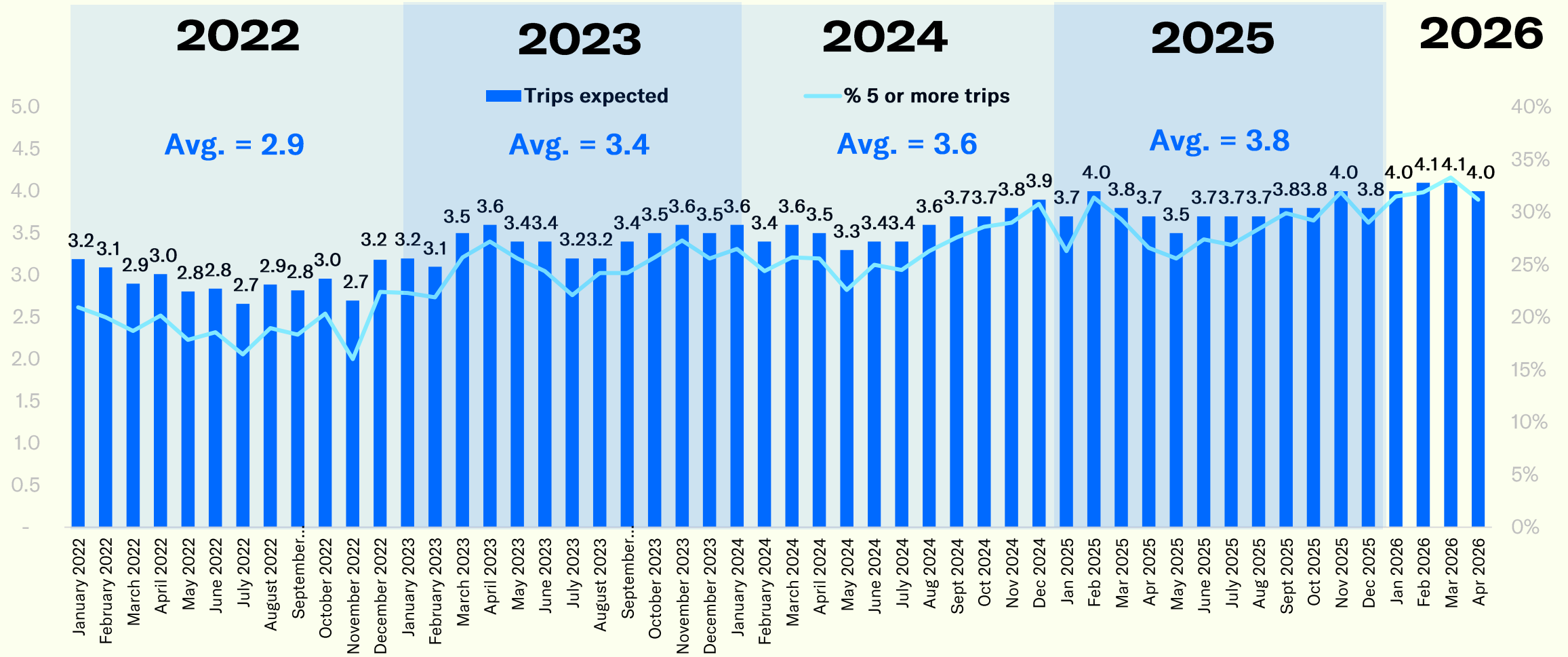
Question:

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



Trip Expectations Start the Year at 4.0+ for All Four Months — A Post-Pandemic First

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

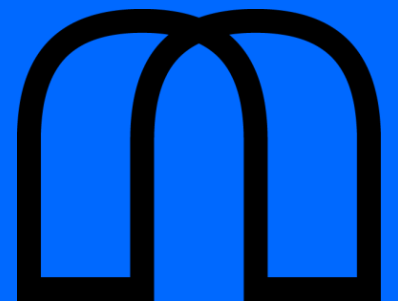


Americans' Summer Travel Plans Remain Stable – July & August Are Filling Out

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



Where Travelers Want to Go: Destinations Driving Aspiration



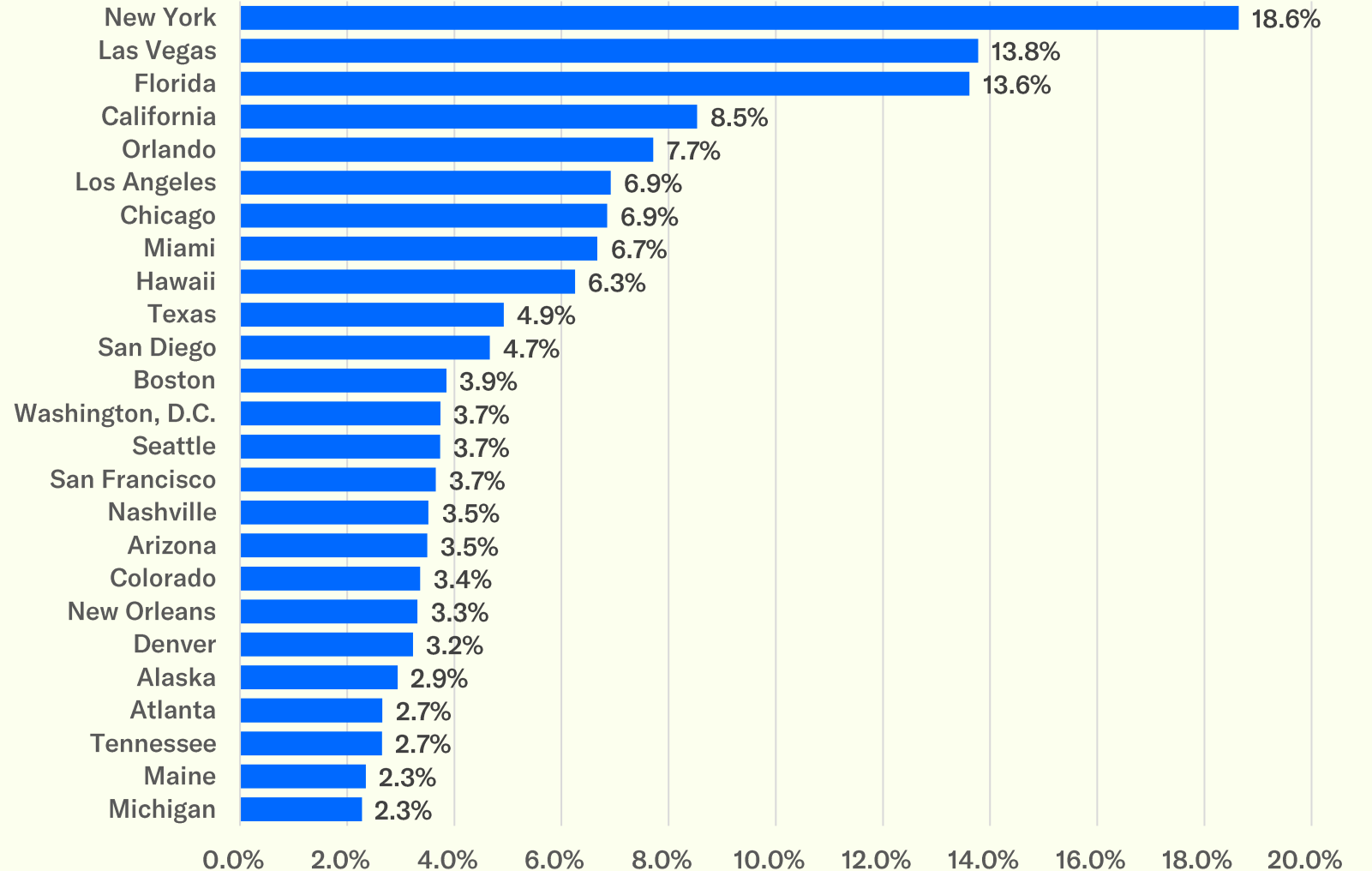
We Asked...

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

New York, Las Vegas and Florida Top the List

Question:

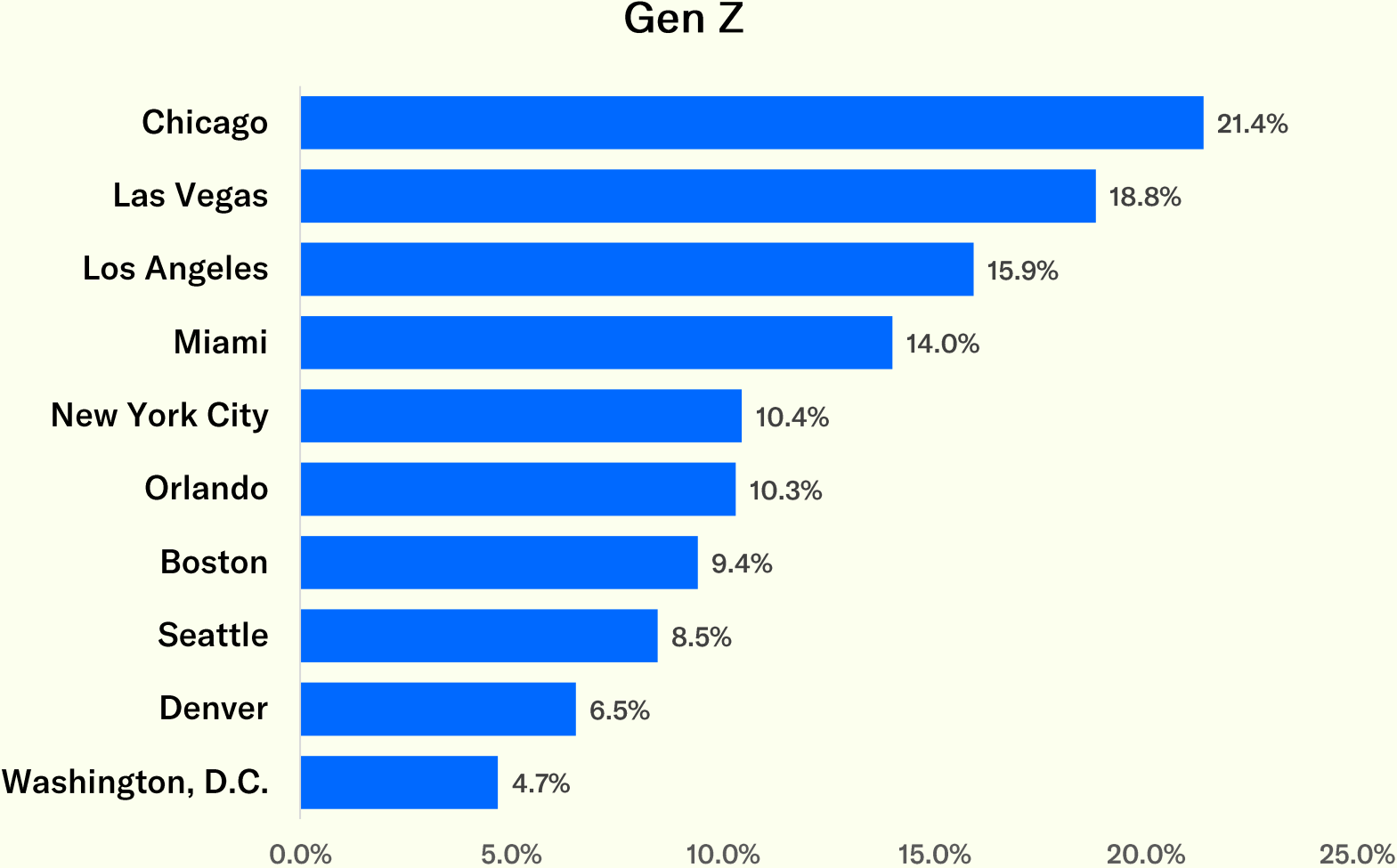
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



Gen Z wants to visit Chicago, Las Vegas, and Los Angeles

Question:

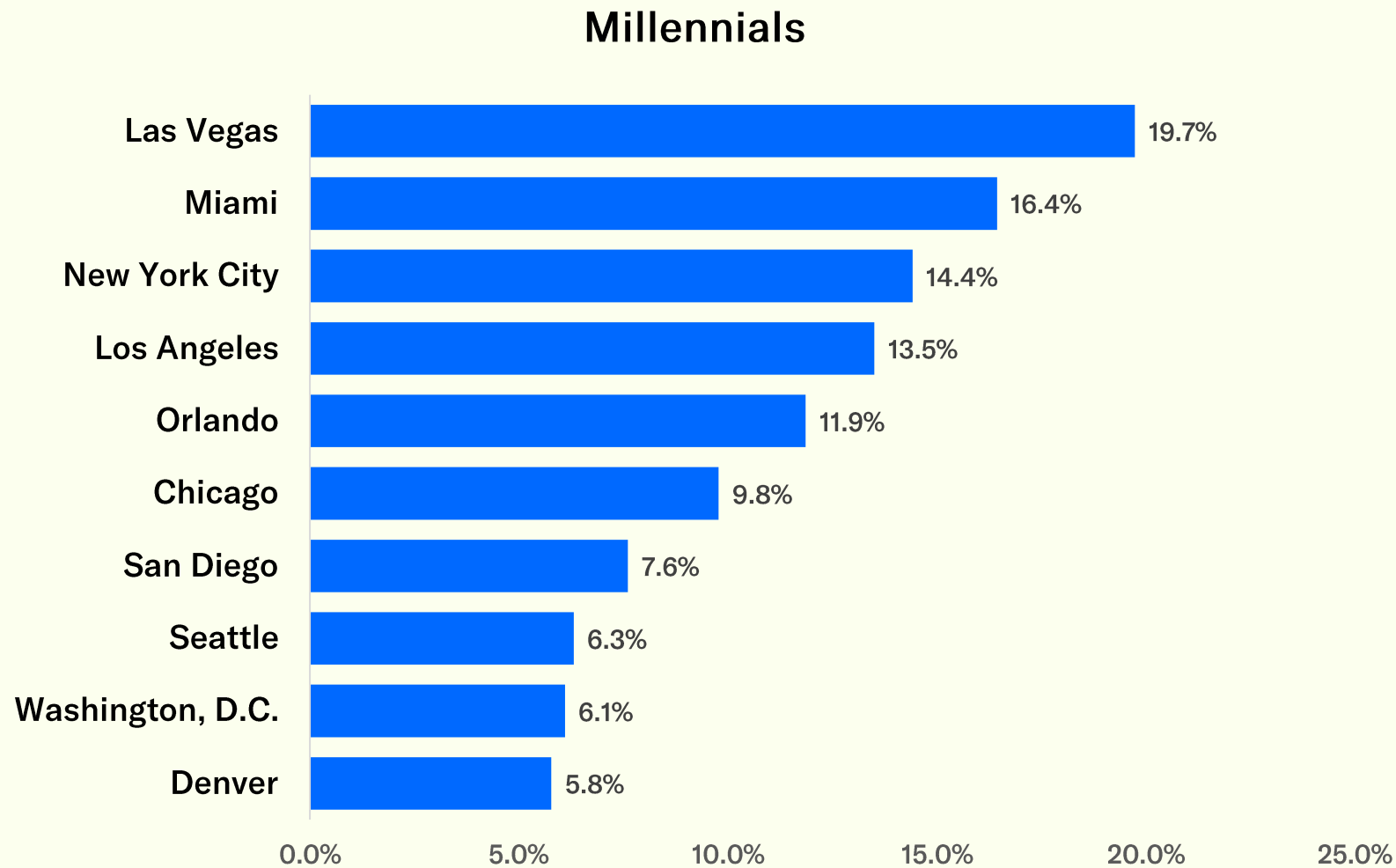
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



Millennials want to visit Las Vegas, Miami, and NYC

Question:

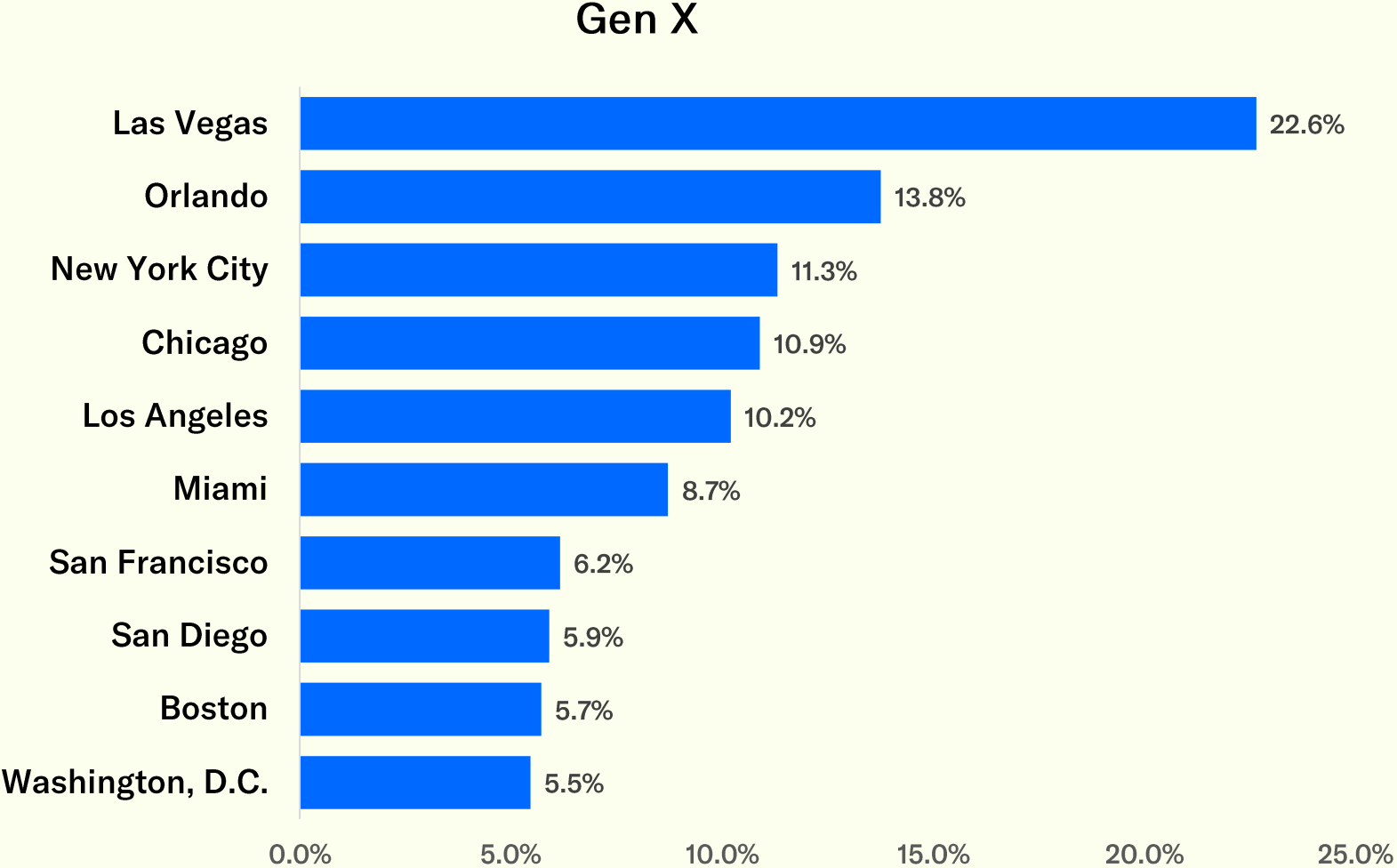
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



Gen X want to visit Las Vegas, Orlando, and NYC

Question:

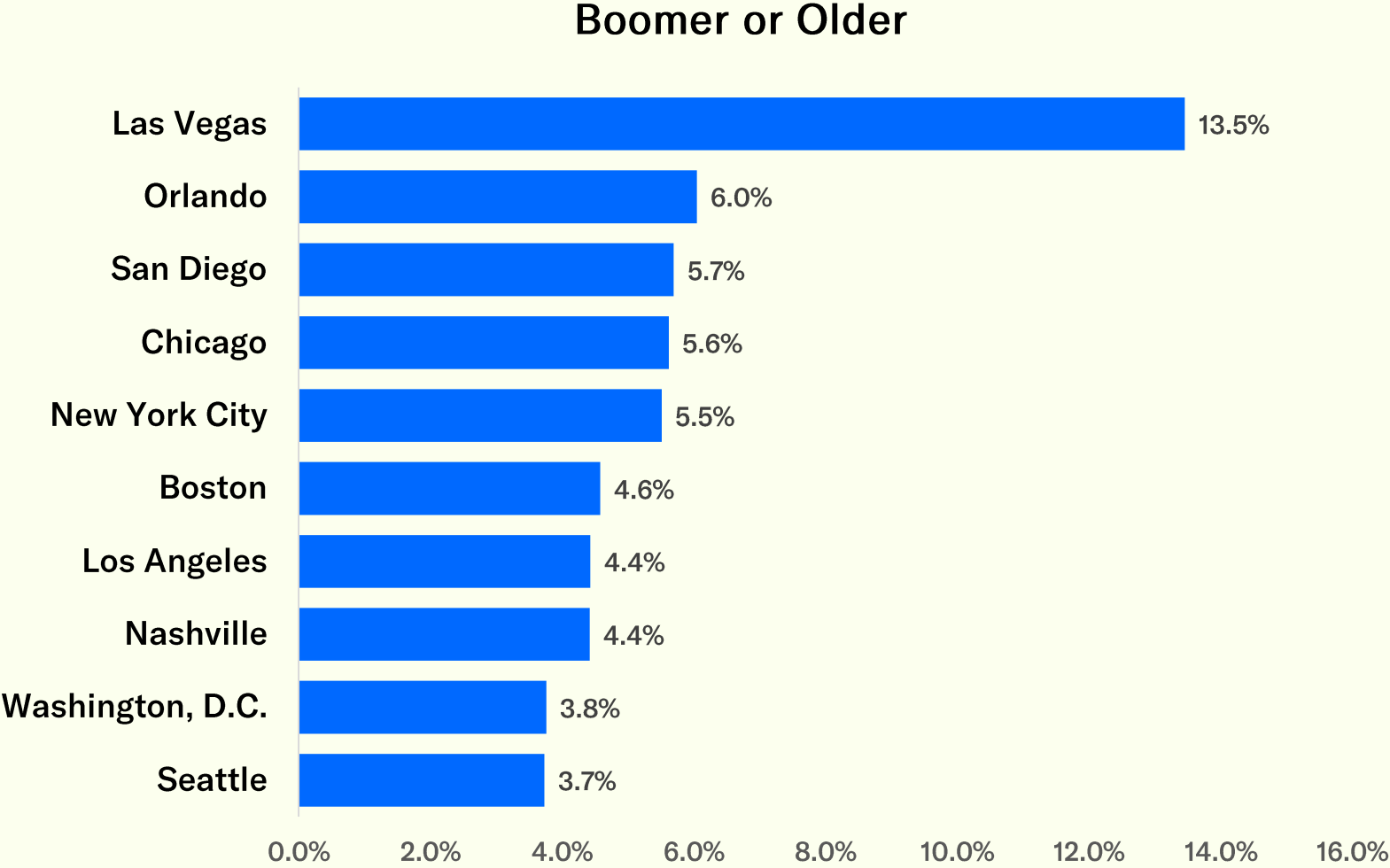
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



Boomers want to visit Las Vegas, Orlando, and San Diego

Question:

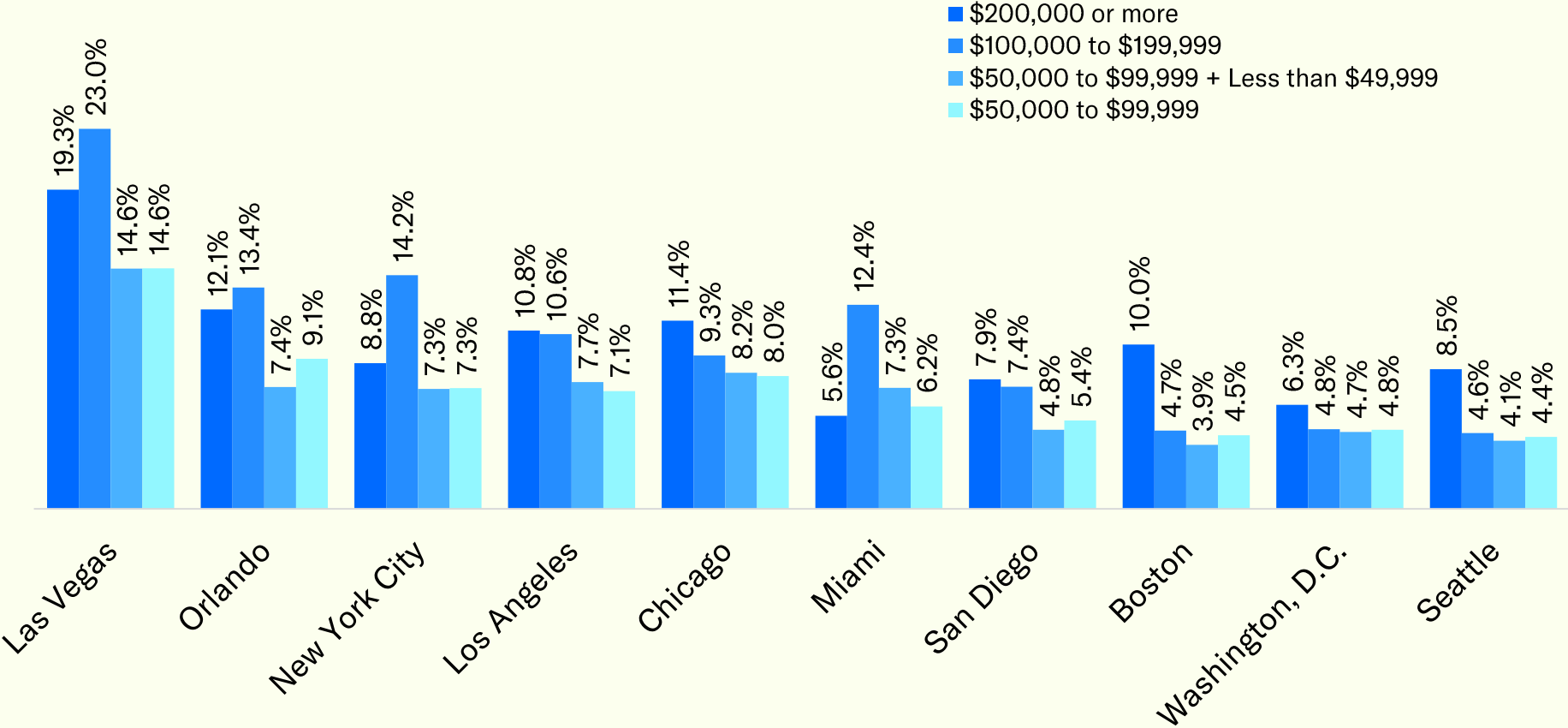
Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



Top 10 Domestic Destinations by Income Level

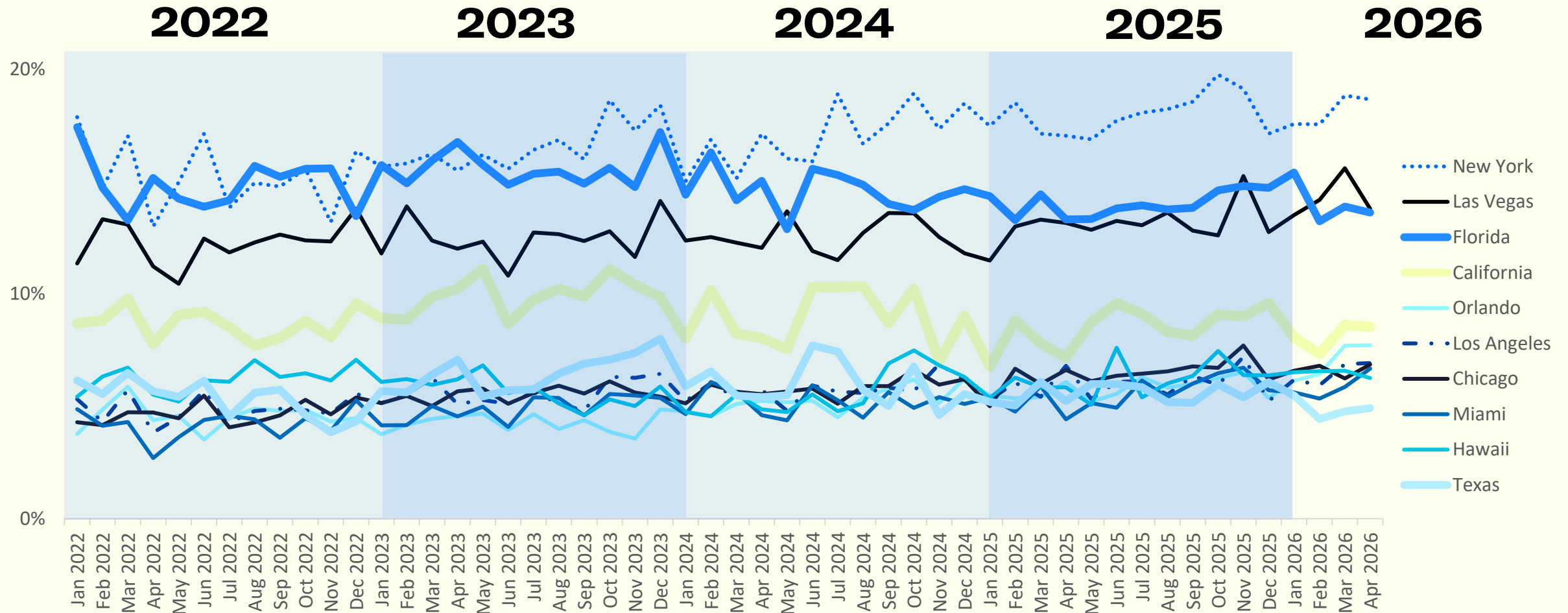
Question:

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



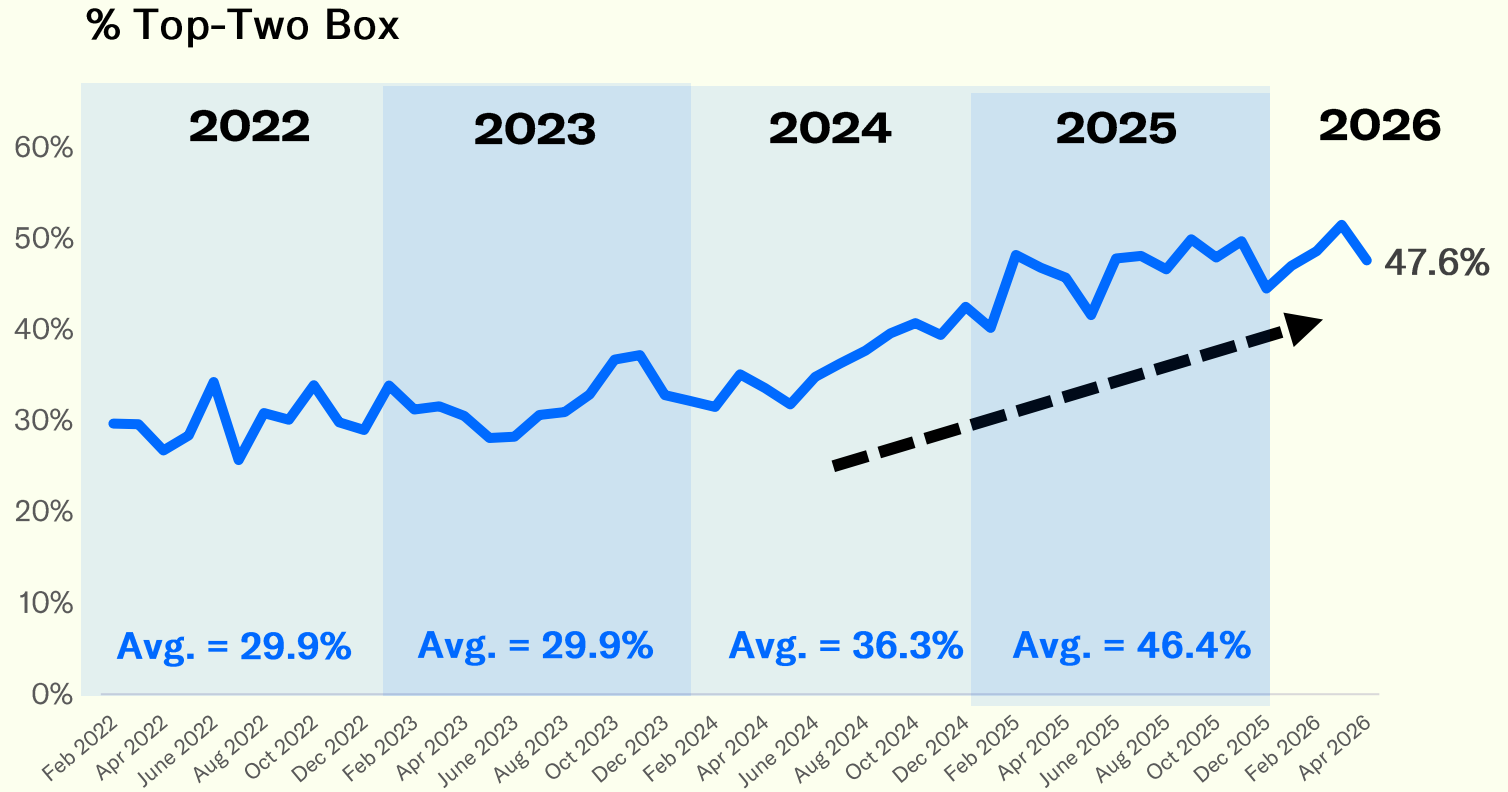
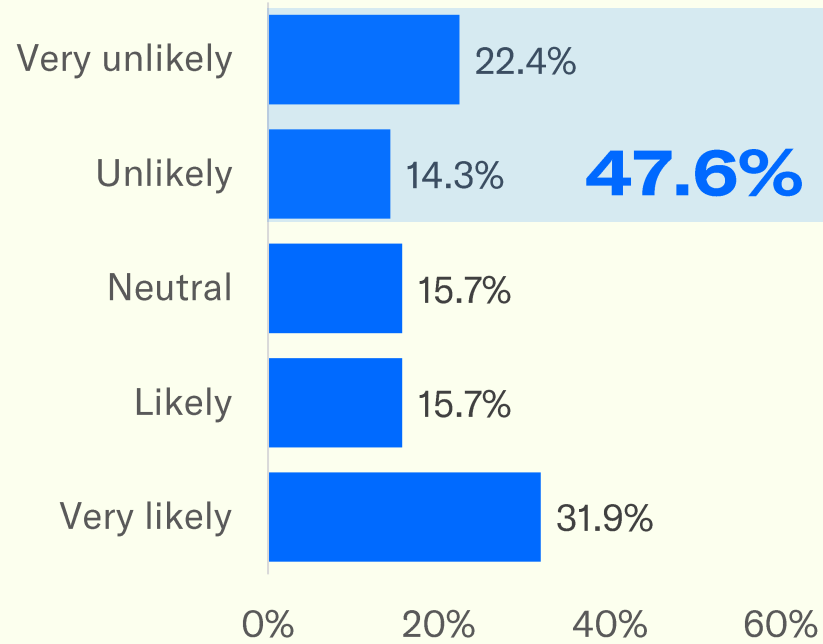
Top 10 Domestic Destinations (Time Series)

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

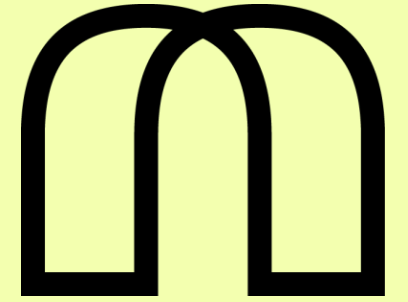


Travel Outside the USA Remains Popular

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



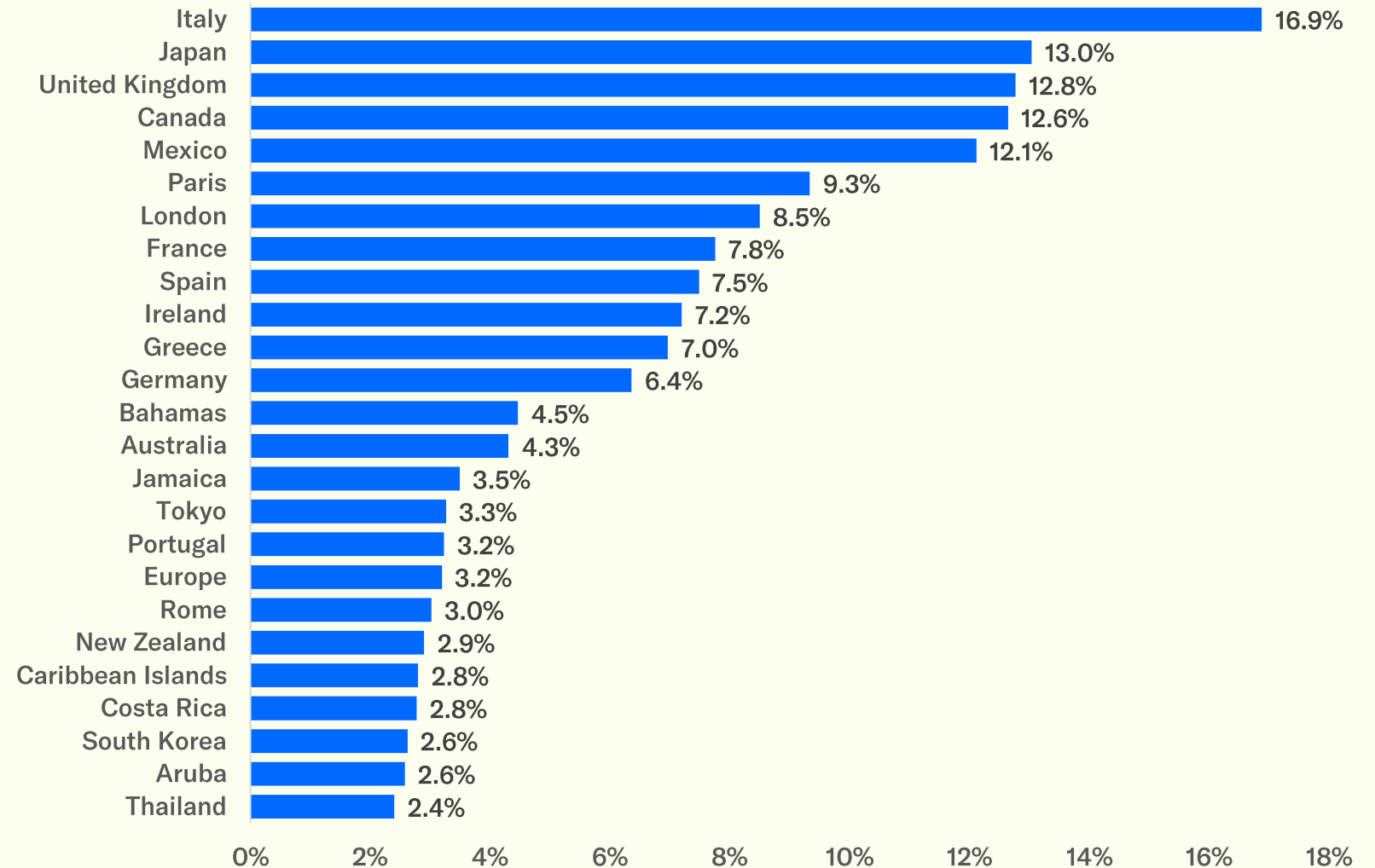
We Asked...



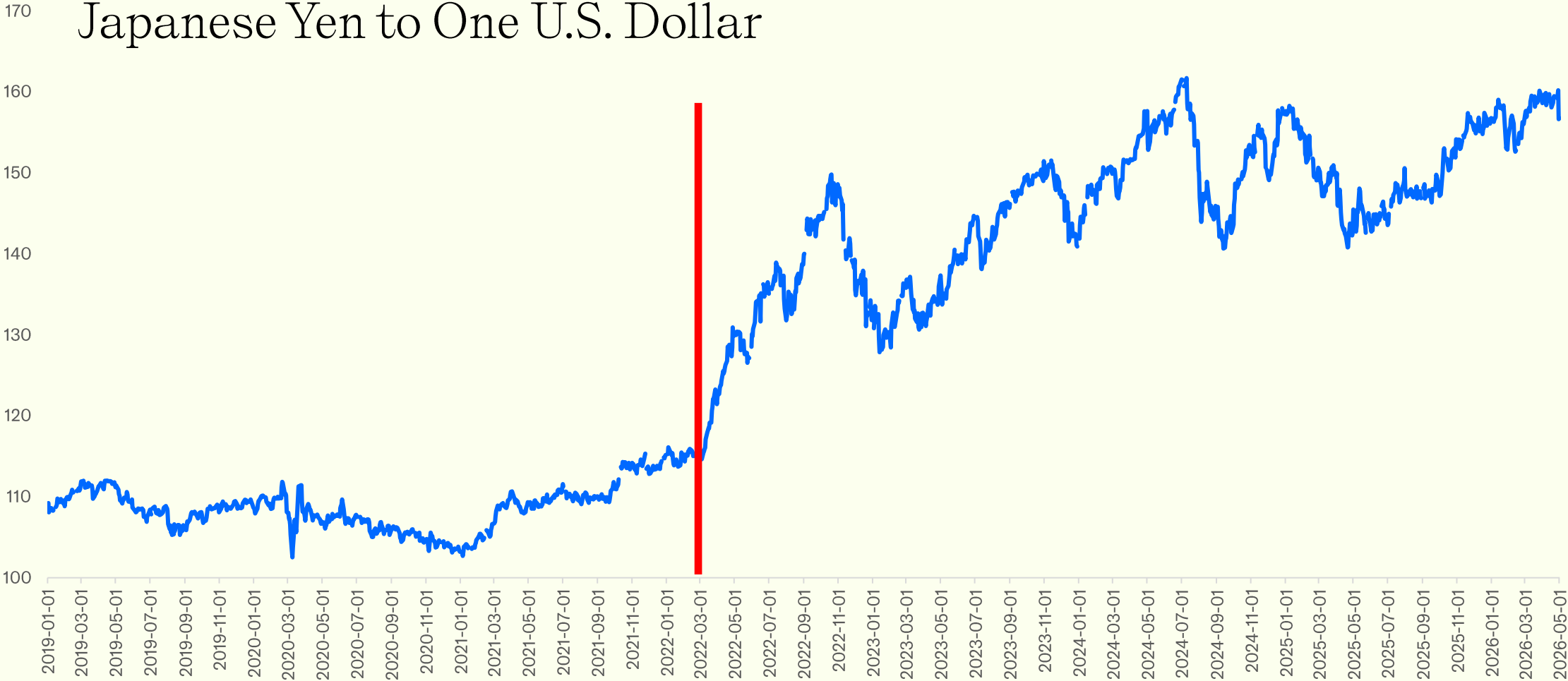
**Which FOREIGN
DESTINATIONS do you most
want to visit in the NEXT
TWELVE (12) MONTHS?
(Write in up to 5)**

Italy, Japan, U.K., and Canada Lead

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



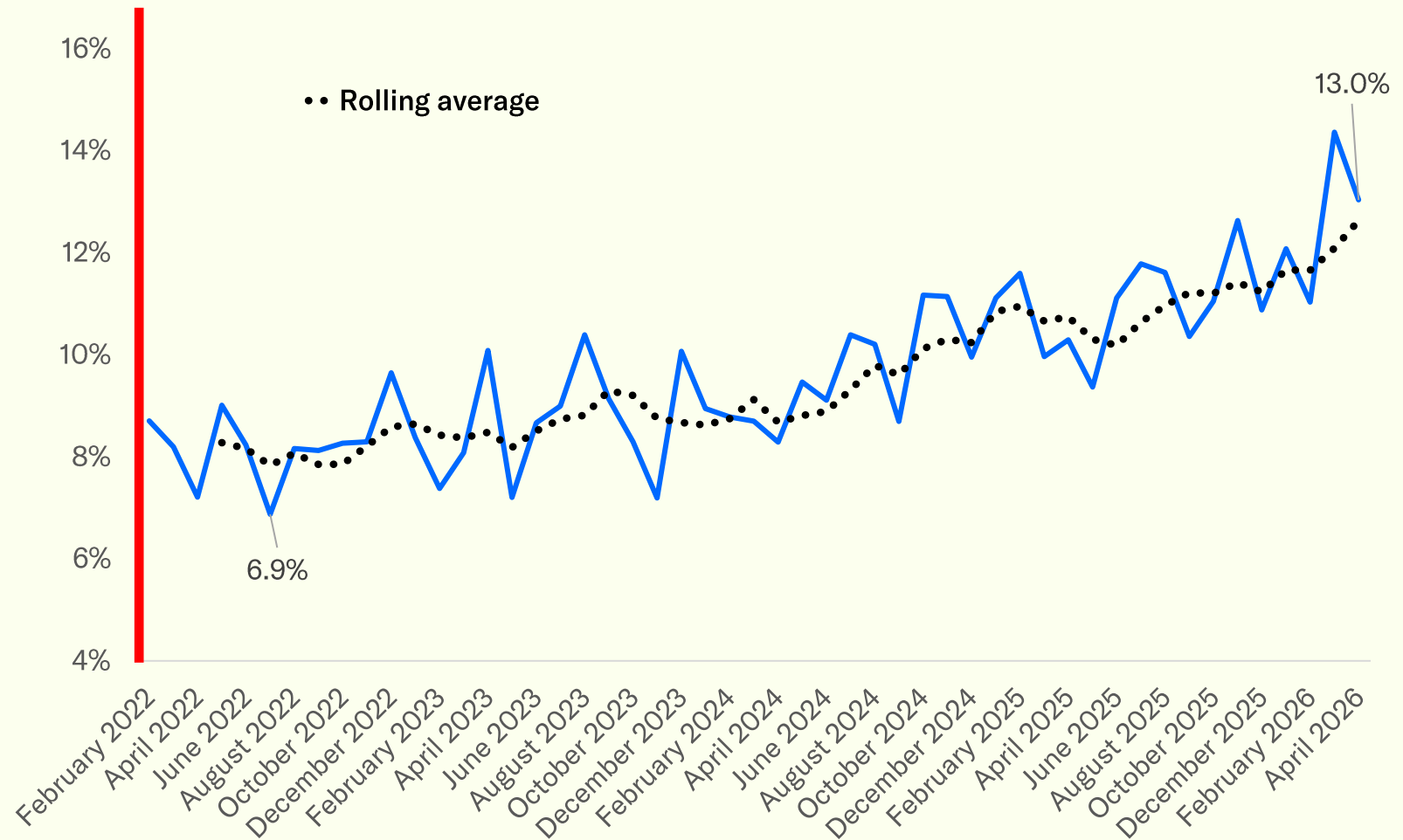
A weak Yen makes Japan affordable



Interest in Visiting Japan is at a High

Question:

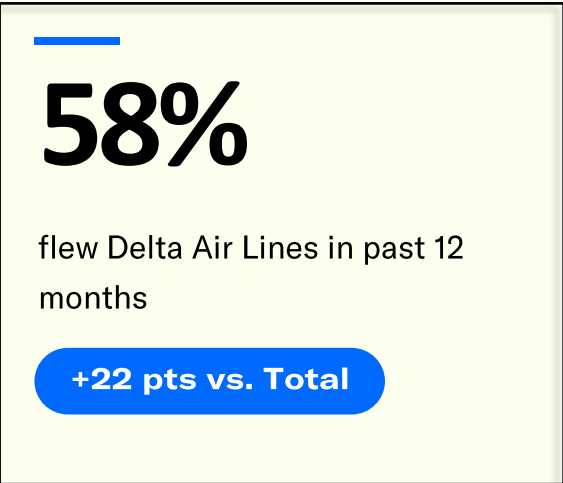
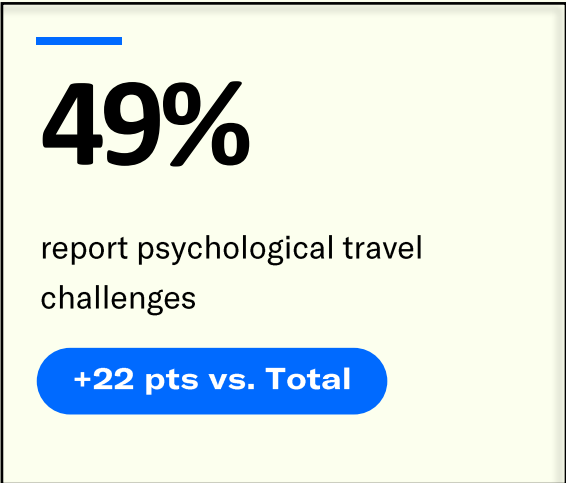
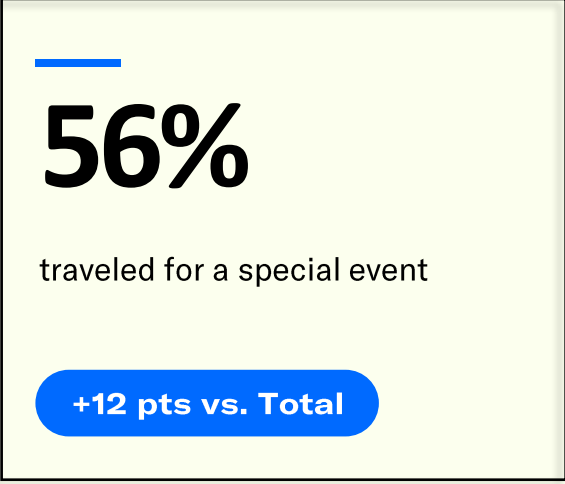
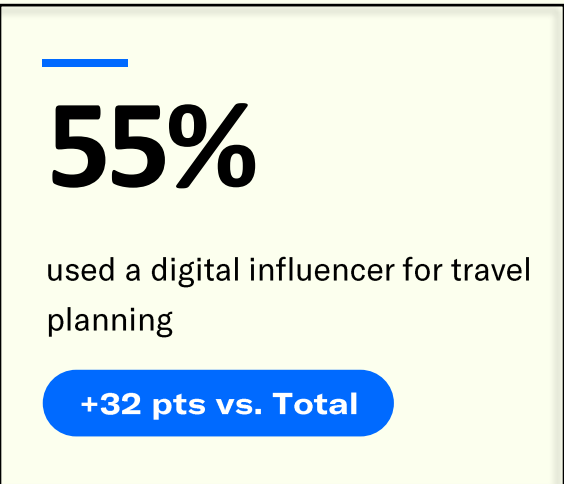
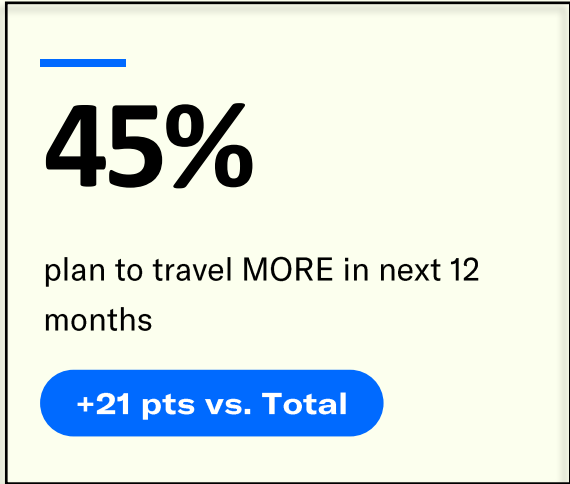
Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to 5)



The State of the GenZ Traveler



Five Numbers that Define the Gen Z Traveler



Gen Z is the most growth-oriented, digitally-native, experience-driven segment in American travel.

Gen Z is the Most Growth-Oriented Travel Segment

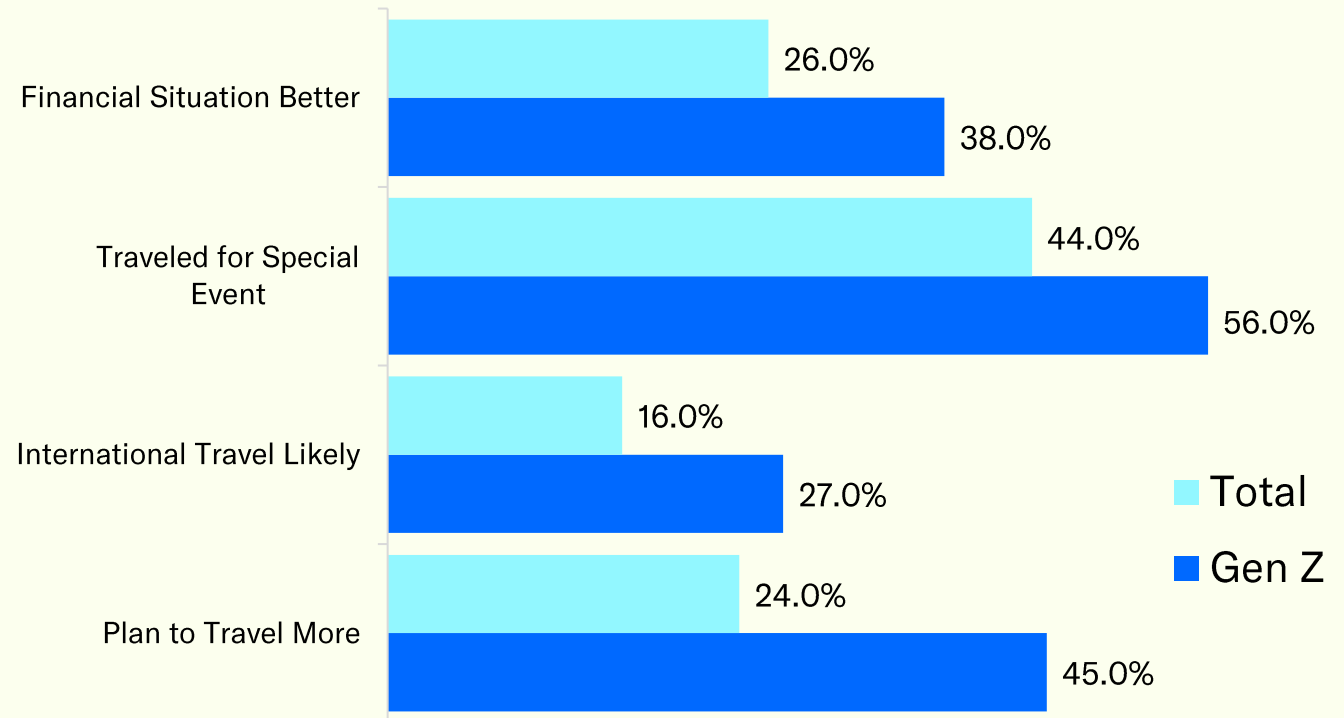
Nearly half of Gen Z plan to travel more in the next 12 months — nearly double the overall rate. They are also far more open to international travel, with fewer structural barriers holding them back.

3%

of Gen Z say international travel is "Very Unlikely" — 19 pts below the average.

Fewer structural barriers, stronger global appetite.

Gen Z Vs. Total – Key Travel Behaviors



Optimistic Outlook with a Budget Ceiling

Gen Z is strikingly bullish about their near-term finances — nearly 3× the overall rate expect to be "much better off" within a year. But current income constrains how far that optimism translates to spend.

38%

say financial situation is better vs. 1 year ago

+12 pts vs. Total

32%

expect to be "much better off" within 1 year

+20 pts vs. Total

39%

rate leisure travel as high spending priority

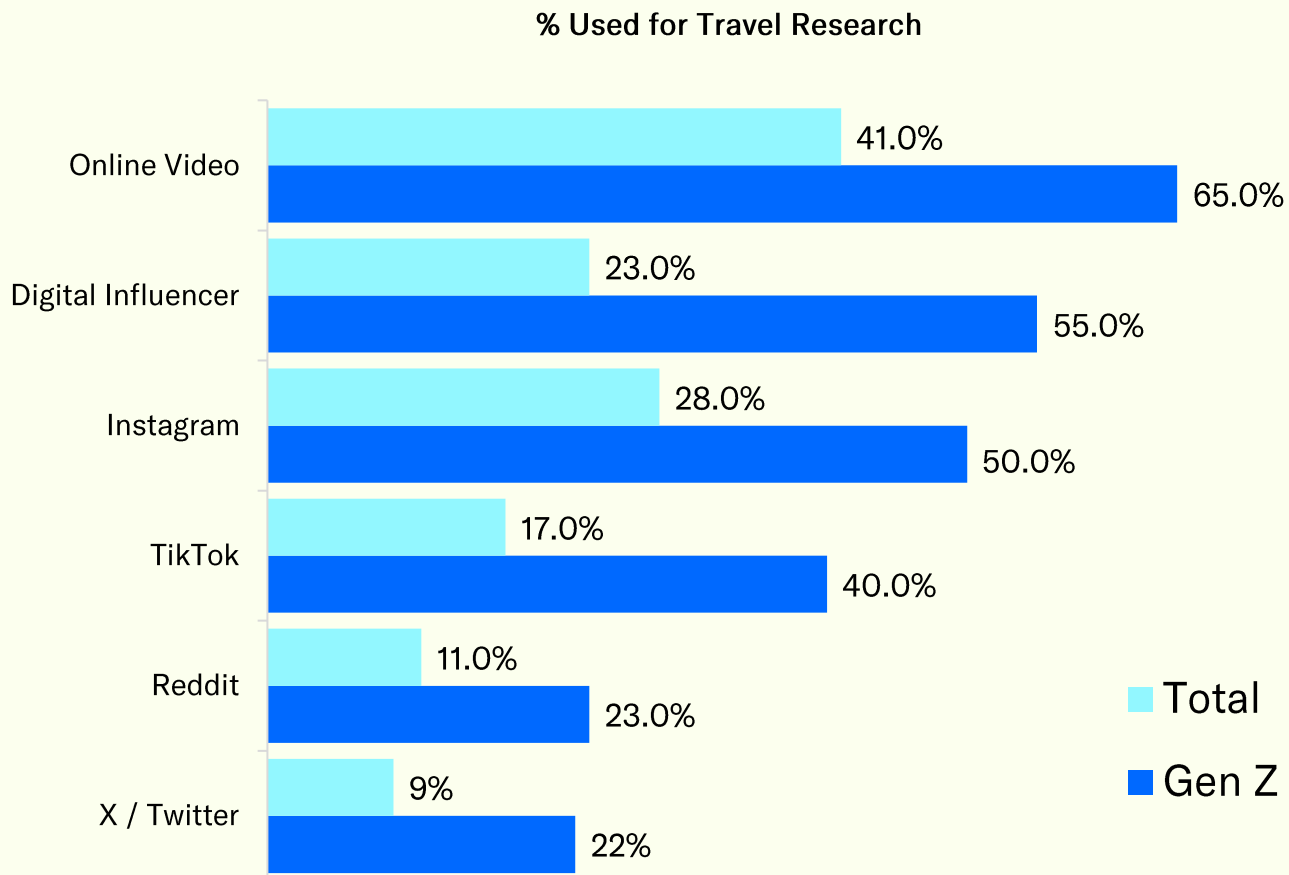
+11 pts vs. Total

Budget ceiling: only 12% of Gen Z budget \$10,000+ for leisure travel (-12 pts vs. Total).

High aspiration, constrained capacity. Reach them early in the planning cycle with value-forward messaging.

Video and Influencers are the Front Door

Influencer use is the single largest behavioral gap in the entire dataset (+32 pts). Video platforms dominate discovery. TikTok is both a research and a conversion channel.



+32 pts

Influencer gap

+24 pts

Online video gap

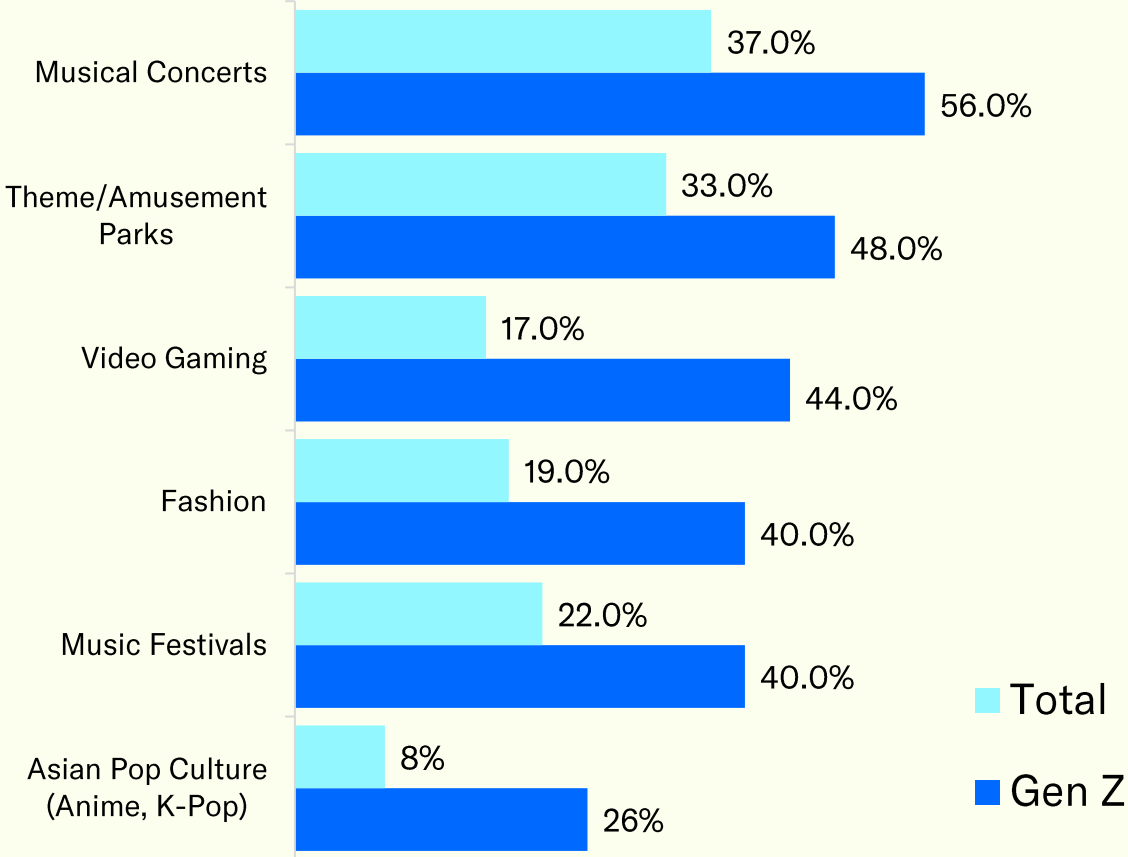
+23 pts

TikTok gap

Experience-Driven in Every Dimension

Gaming is the largest single interest gap (+27 pts). Live music, fashion, theme parks, and Asian pop culture all over-index sharply — each pointing to distinct travel programming opportunities.

% Highly Interested – Lifestyle Categories



+27 pts Gaming

+21 pts Fashion

+18 pts Pop Culture

Social Roots. Career-Active. Work Barrier.

HOW THEY TRAVEL

61% **+16 pts**

took an overnight VFR trip (visit friends / relatives)

47% **+15 pts**

took at least 1–4 business or conference trips

34% **+12 pts**

cite work busyness as a travel barrier

14% **+10 pts**

cite sold-out availability as a barrier

TRAVEL CHALLENGES

49% **+22 pts**

Psychological challenges (anxiety, mental health)

27% **+18 pts**

Hearing-related challenges

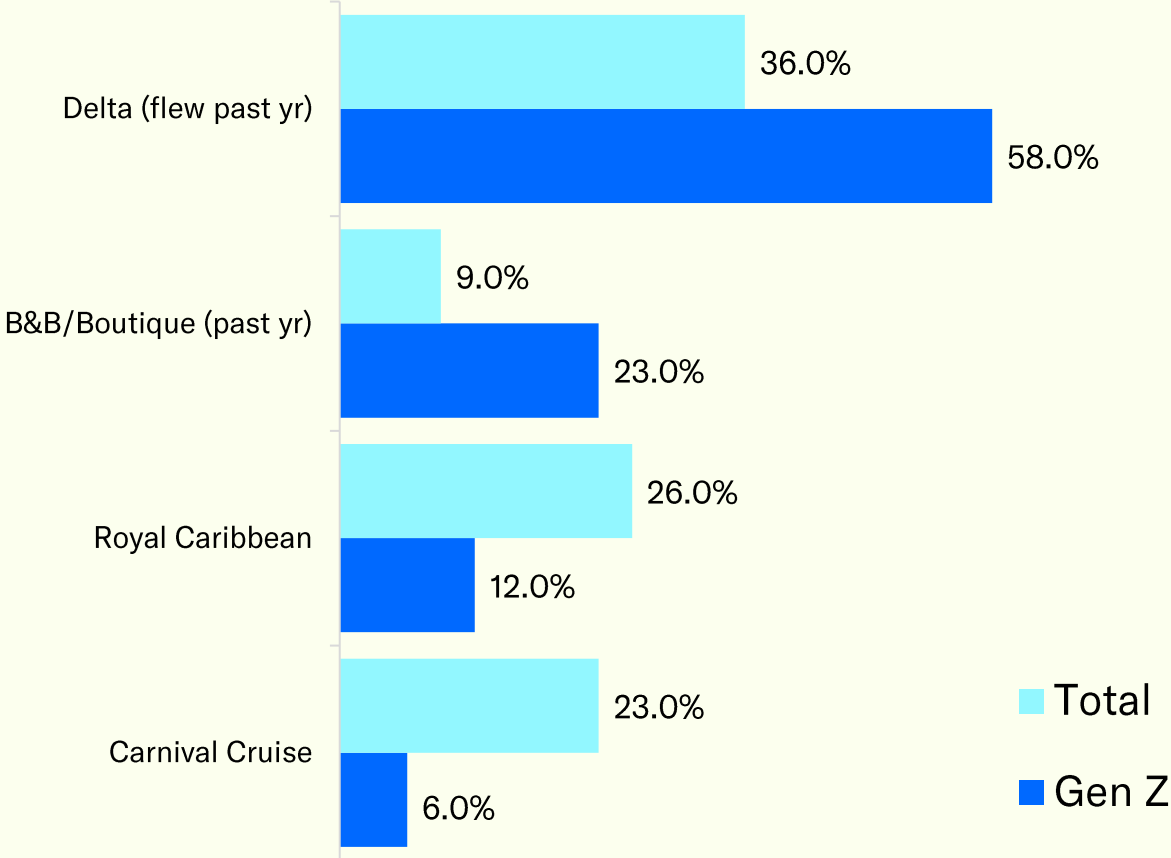
34% **-17 pts**

Mobility / physical challenges

Delta Wins. Cruises Not Registering. YouTube Dominates.

Brand preferences and media habits reveal where Gen Z is and isn't reachable, and which travel products resonate.

Airlines, Lodging, & Cruises



Media Consumption

79% +27 pts

listen to podcasts via YouTube

51% +22 pts

comedy podcasts (top genre)

52% +15 pts

use ad-free Netflix (hard to reach via ads)

Our Monthly Webinar
Start Time is
Changing!



Starting June 2026,
*The State of the
American Traveler*
Webinar Will Begin at
12pm PT / 3pm ET



The State of the American Traveler

Welcome back, Future Partners!



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

16 Global Feeder Markets Studied
3 Continents
Millions of Potential Travelers

Americas:

Canada, Mexico, Argentina, Brazil, Colombia

Europe:

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

Asia-Pacific:

Australia, China, India, Japan, South Korea

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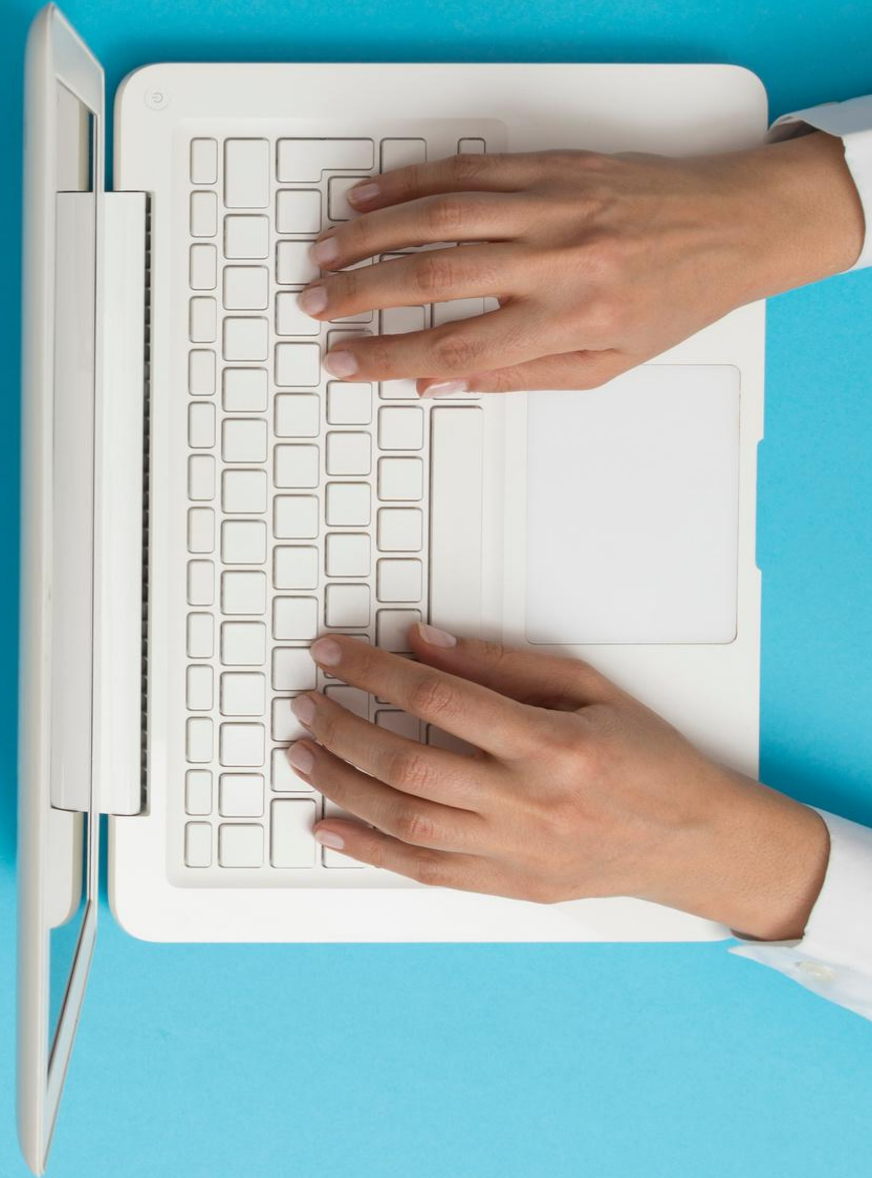
**Questions? *Scan
Here & Our Team
Will be in Touch!***



DMO Website Relevancy Co-op

Understanding the Role of
DMO websites in the Age of AI

Future Partners



**2026
Visitor Guide
Readership
& Conversion
Research
Co-op**



Let's keep the conversation going



[instagram.com/futurepartners.tourism/](https://www.instagram.com/futurepartners.tourism/)



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[Linkedin.com/company/futurepartners](https://www.linkedin.com/company/futurepartners)



Livestream Calendar