

The State of the American Traveler



June Edition

Opportunity powered by *Insight*

Future Partners

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

Future Partners

*Bringing the future of travel
within reach*

Future Partners

An aerial night view of a city with lights and a blue overlay. The text is overlaid on the image.

Presentation deck and recording will be available on our website:

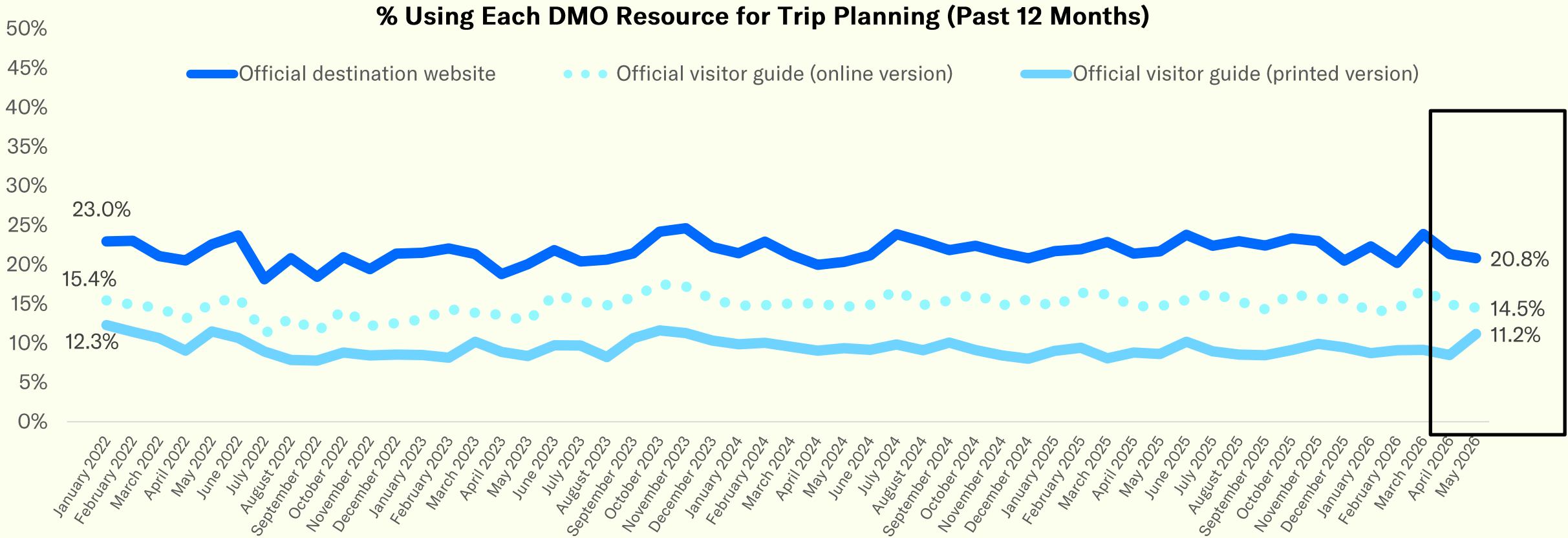
**[FuturePartners.com/
services/webinars](https://FuturePartners.com/services/webinars)**

A Check-in on DMO Trip Planning Resources vs. AI



DMO Resources Used for Trip Planning

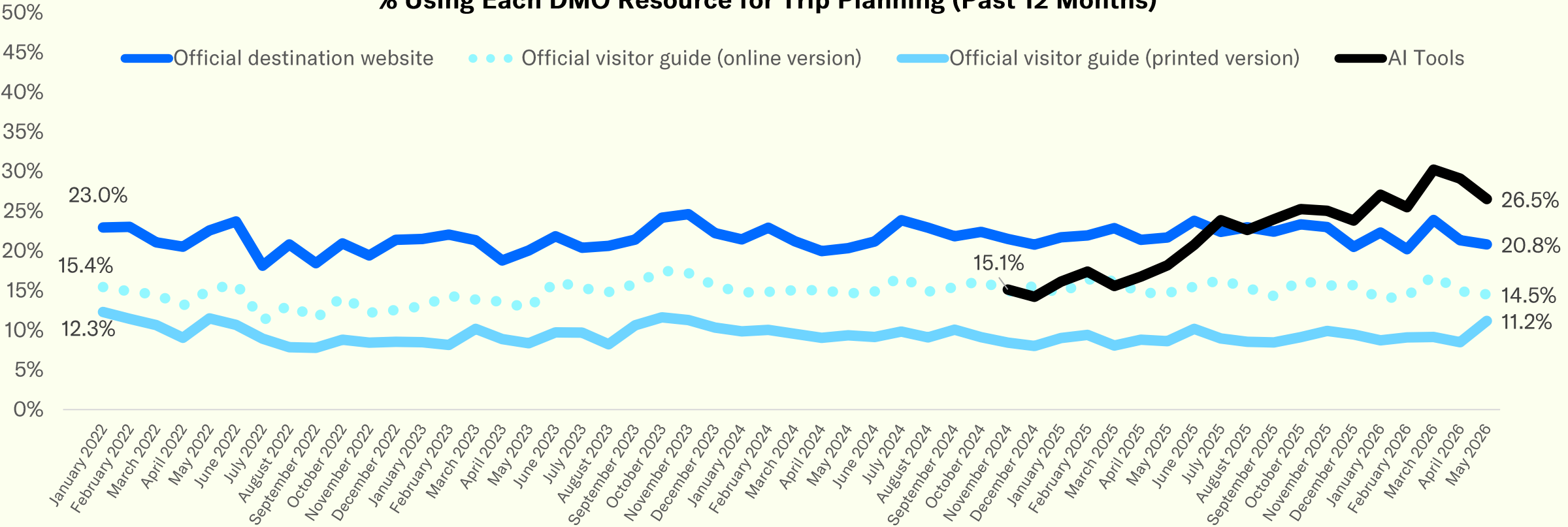
Question: In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel? If so, which resources did you use? (Select all that apply)



AI Tools Surpass DMO Resource Usage

Questions: 1. In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel? If so, which resources did you use? (Select all that apply) 2. In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?

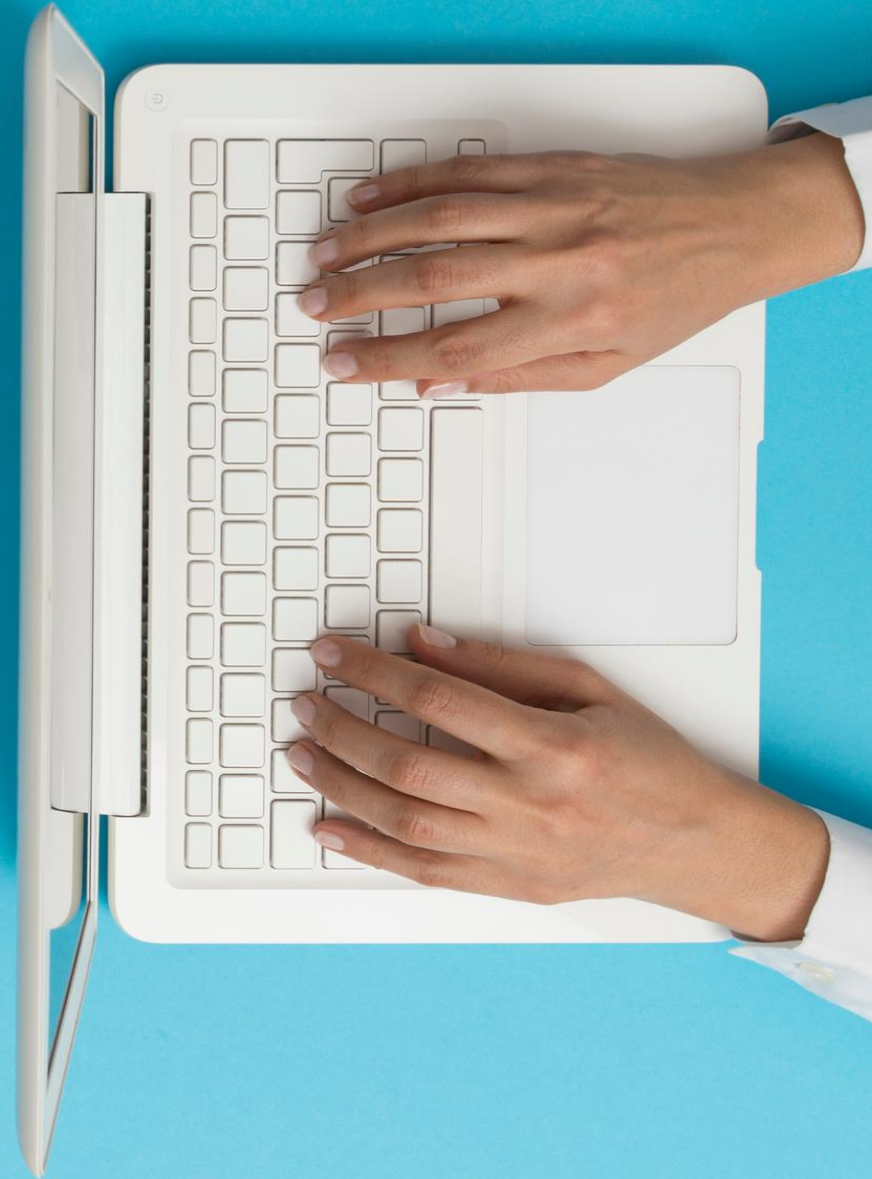
% Using Each DMO Resource for Trip Planning (Past 12 Months)



Website Relevancy Co-op

Understanding the Role of
travel/tourism websites in
the *Age of AI*

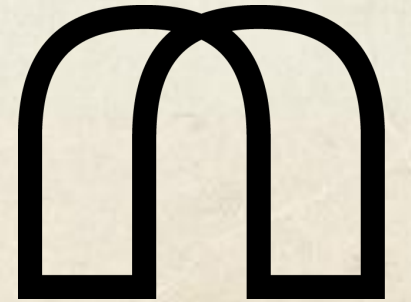
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**2026
Visitor Guide
Readership
& Conversion
Research
Co-op**



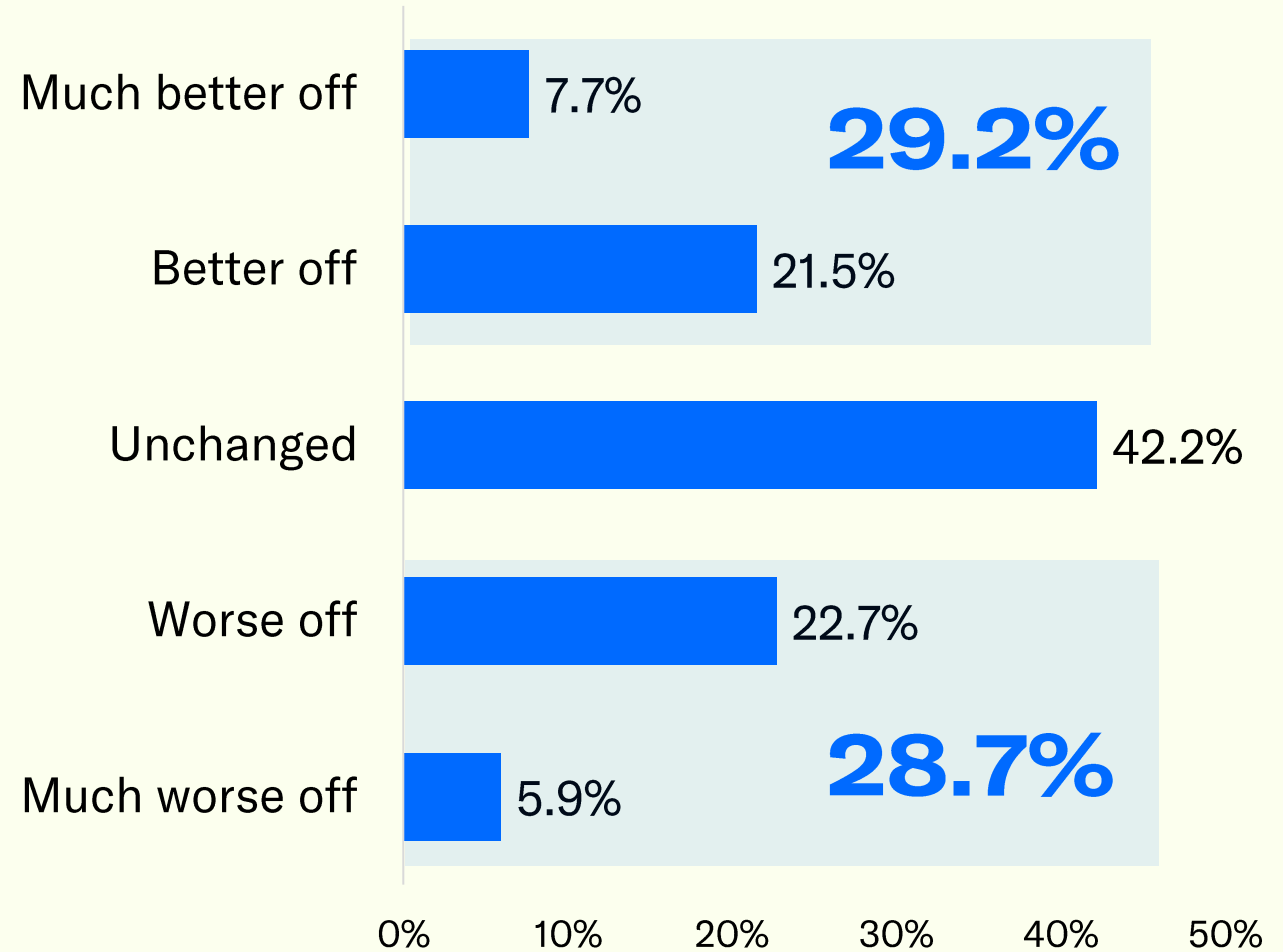
How are Americans Feeling About the Economy?



American Travelers are Split on Whether They are Financially Better Off than Worse Off

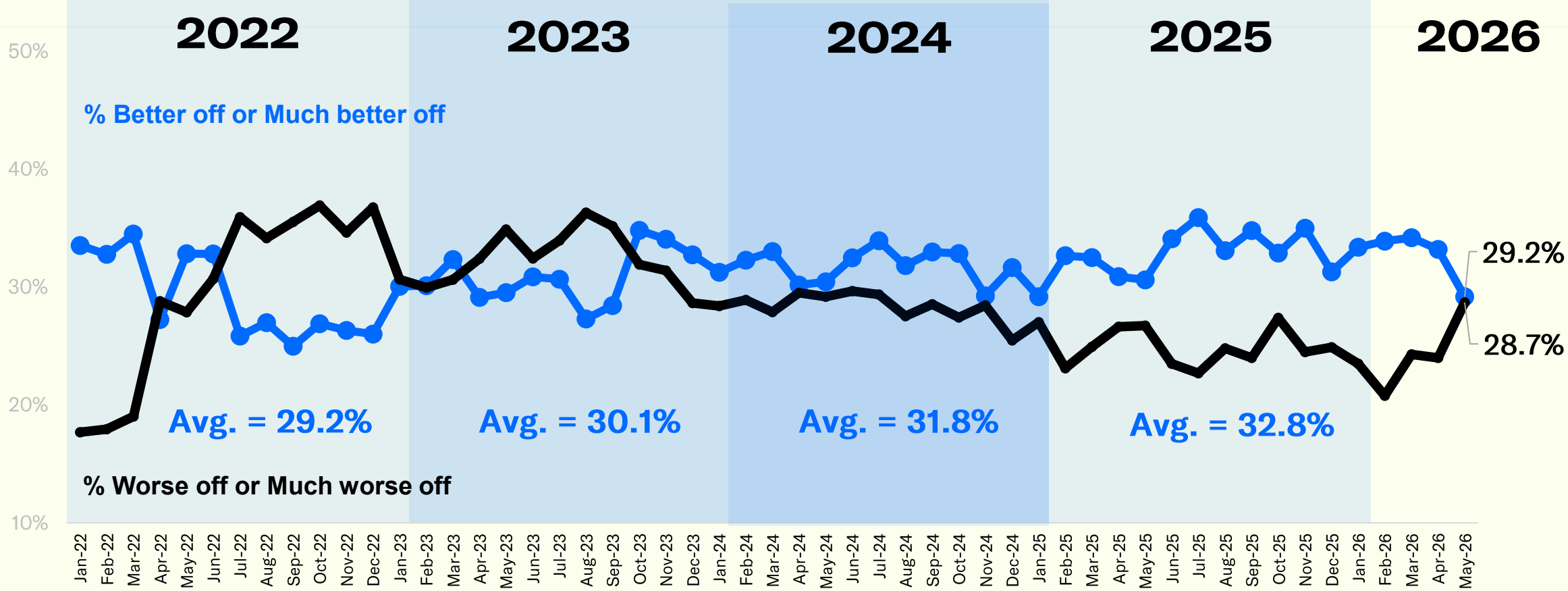
Question:

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

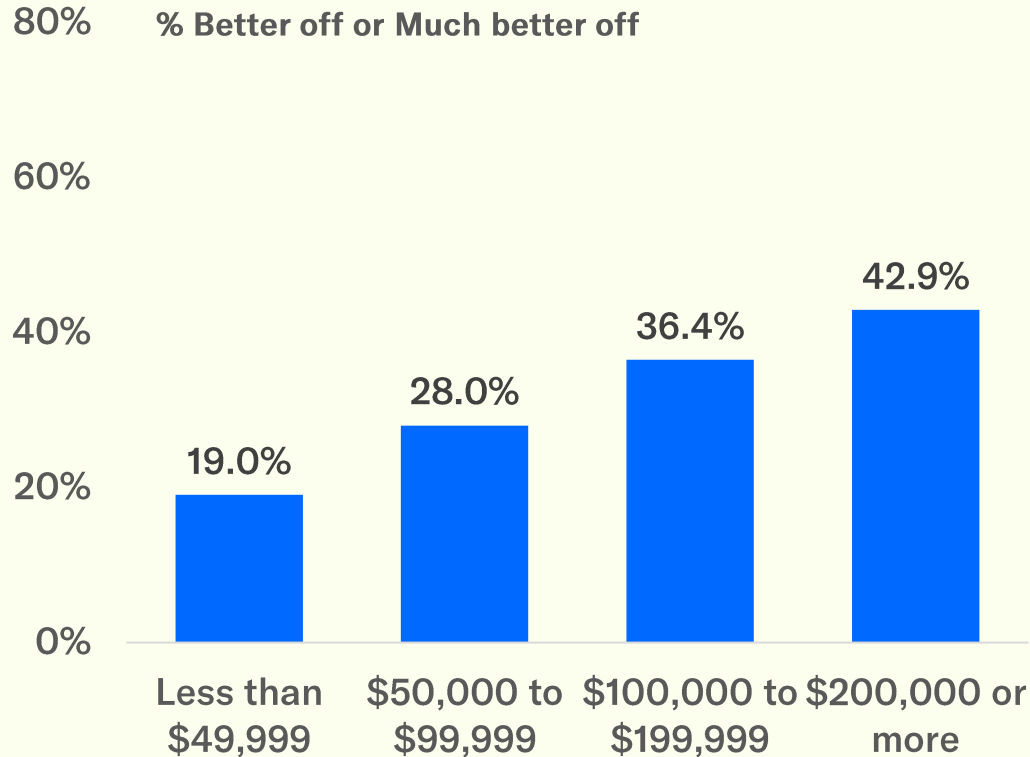


Household Financial Sentiment Shows Continued Stability

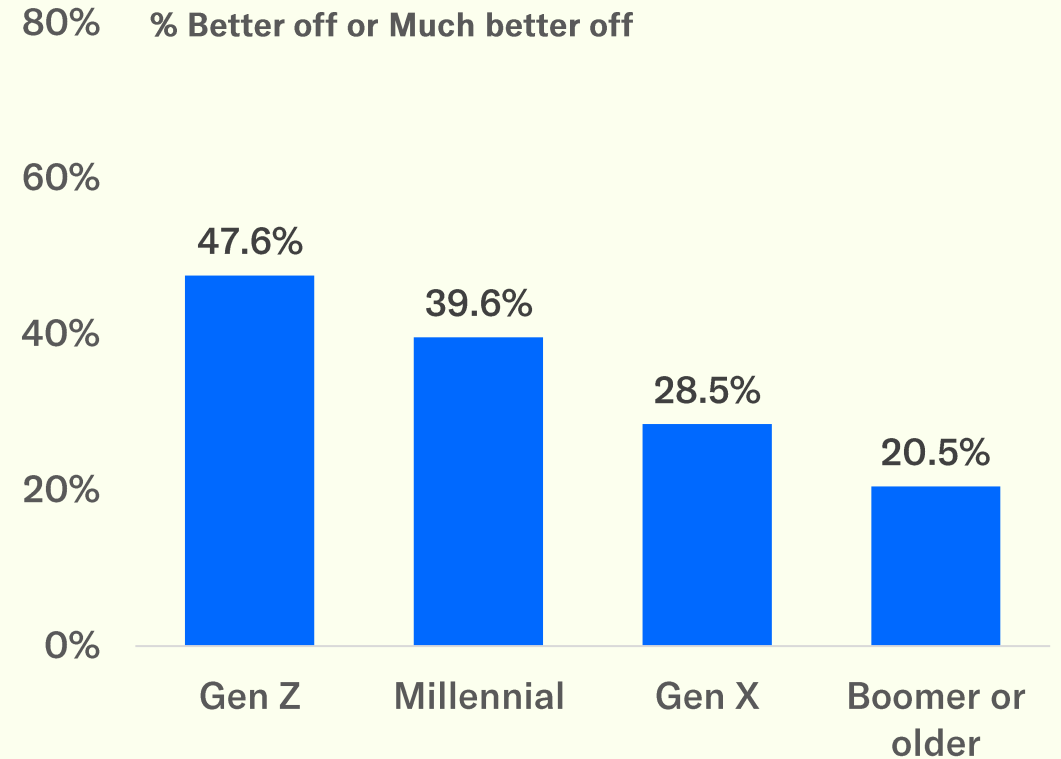
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



High Income Travelers Are the Most Likely to Say They Are Feeling Better Off Financially



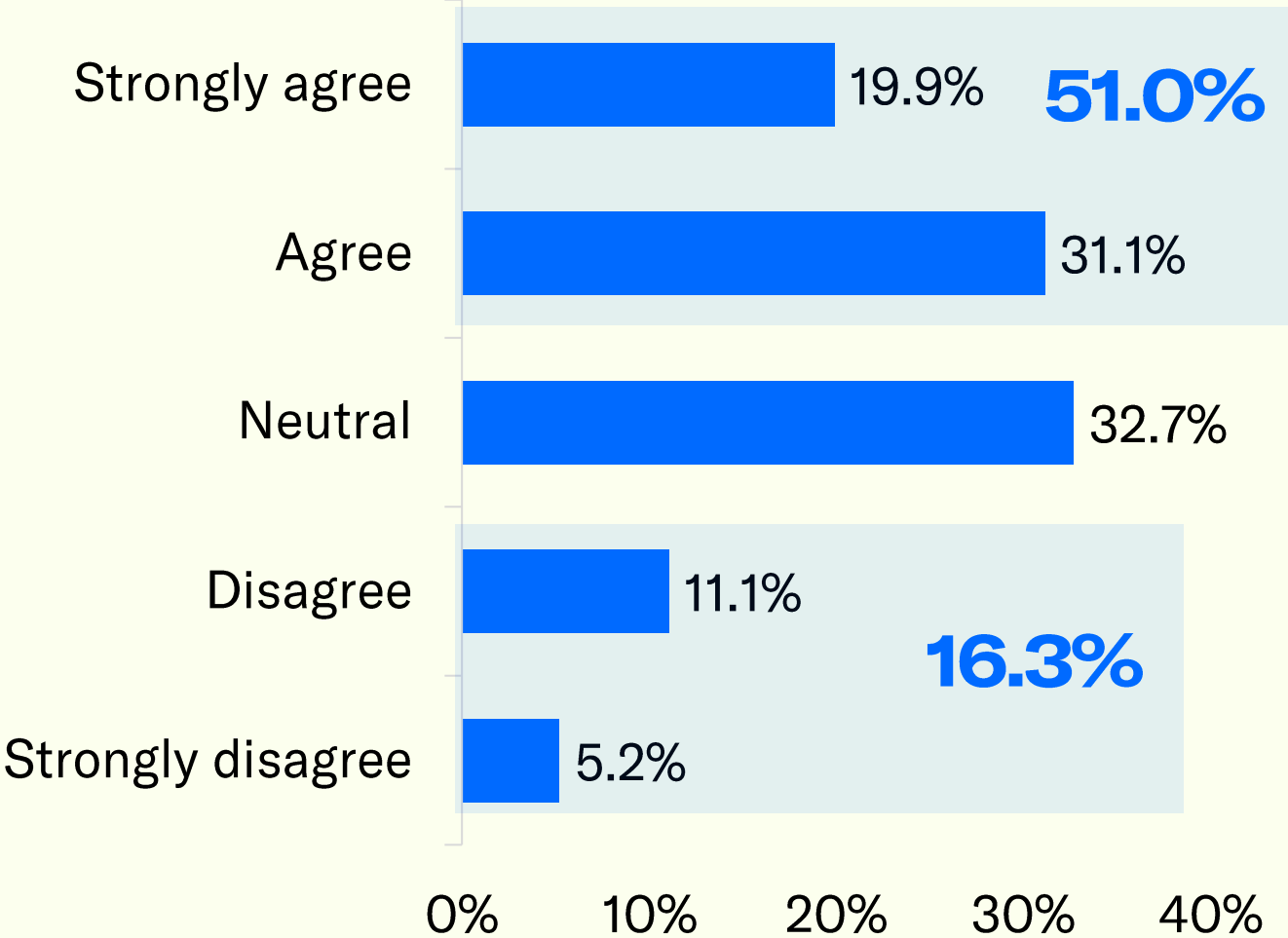
Older Travelers Are the Least Likely to Say They Are Feeling Better Off Financially



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

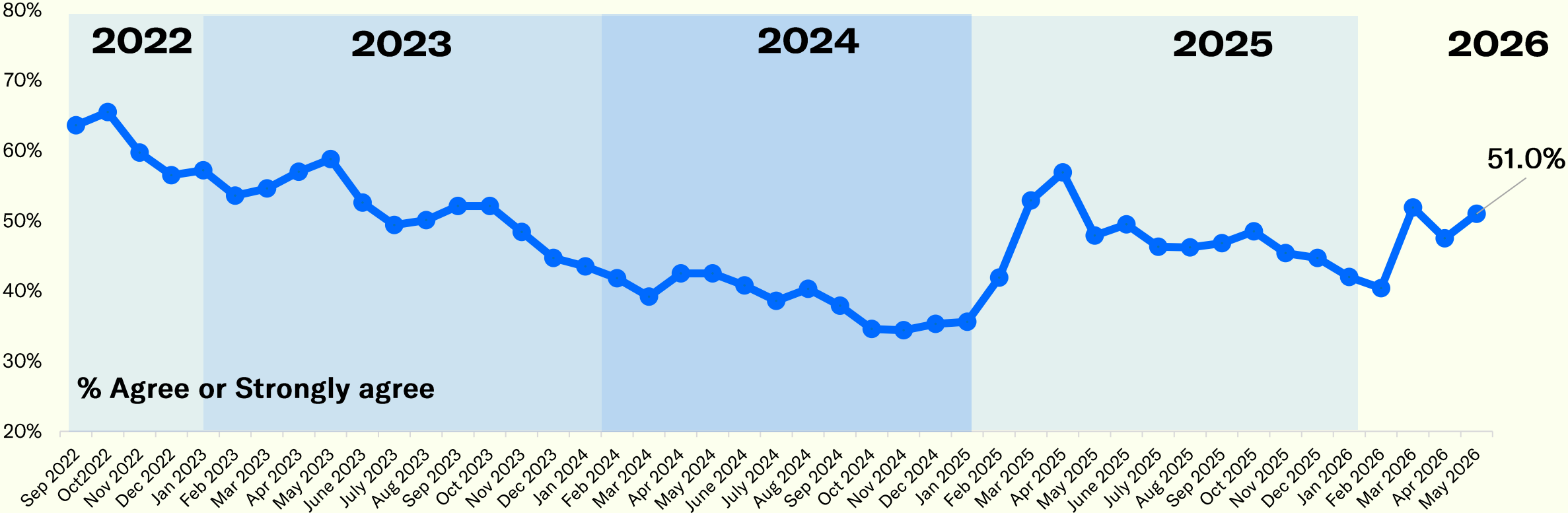
Just Over Half of Americans Expect a Recession in the Next 6 Months

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



Recession Fears Inch Up after Last Month's Decline

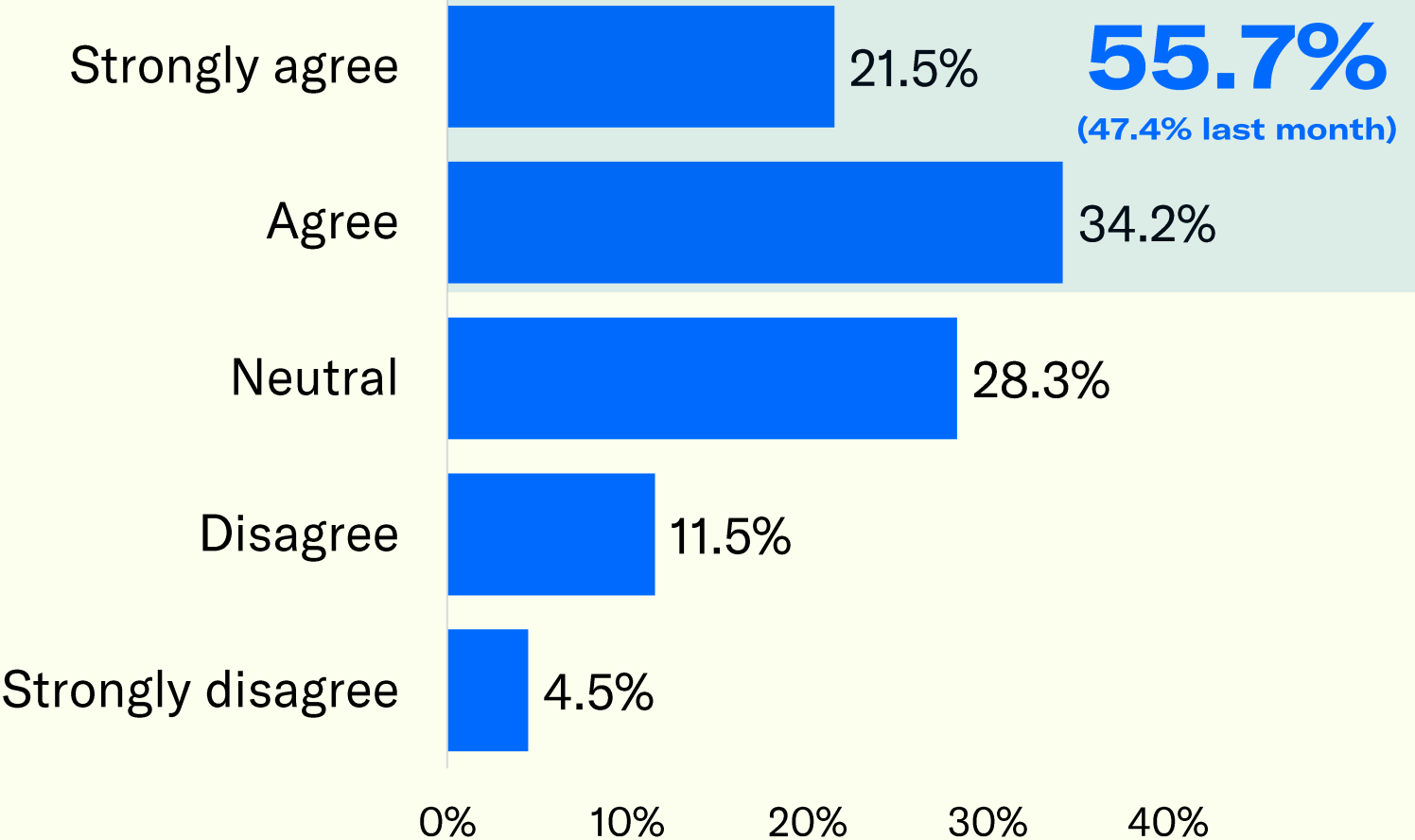
Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



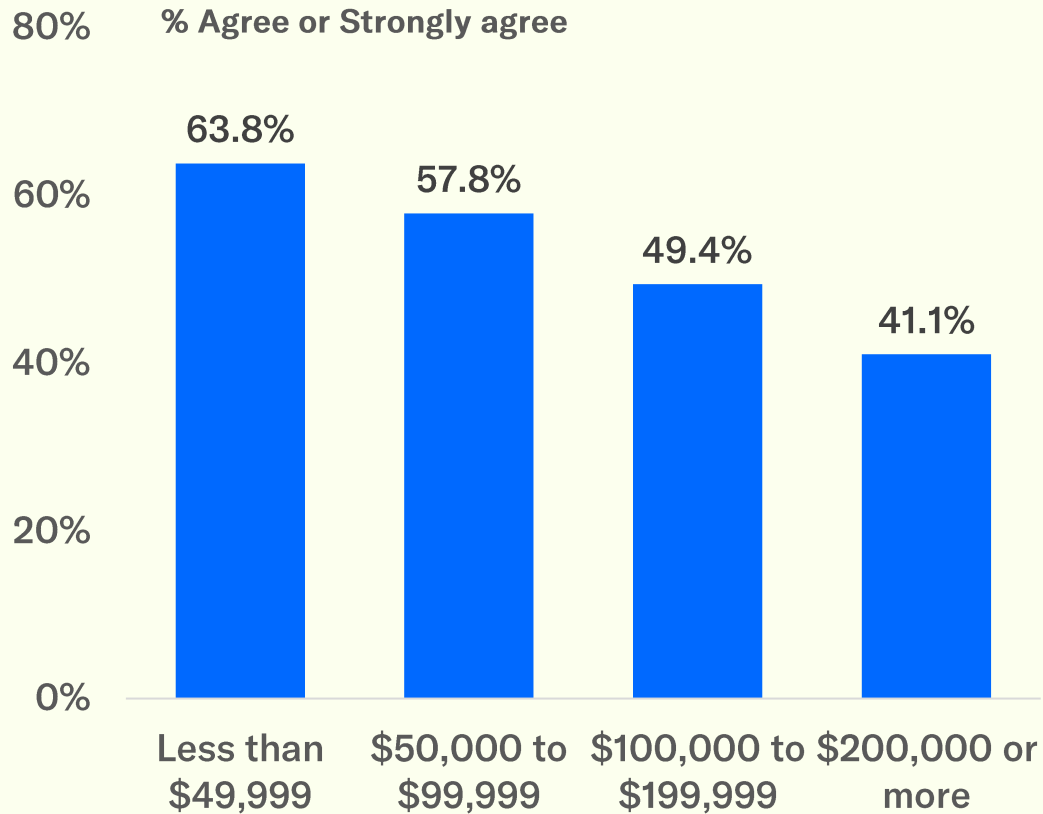
Many Travelers are being Careful with their Money, Fearing an Economic Downturn

Question:

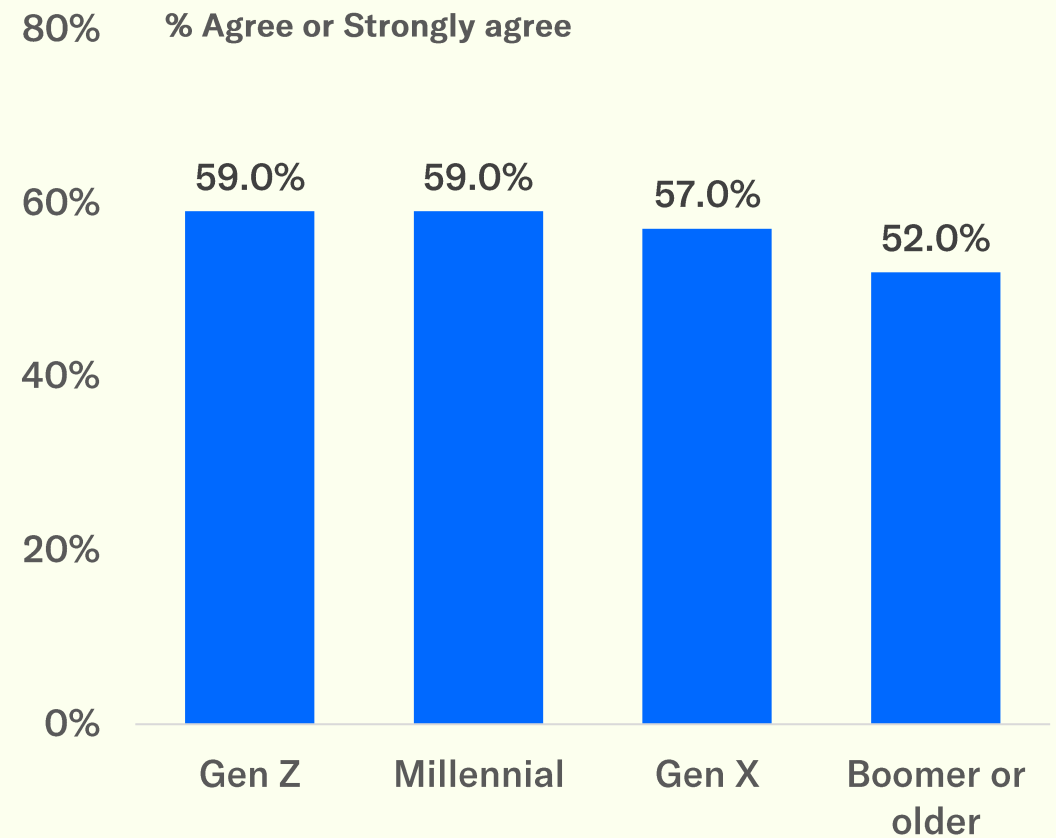
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



Lower Income Travelers Are Counting Their Pennies Worrying About Recession



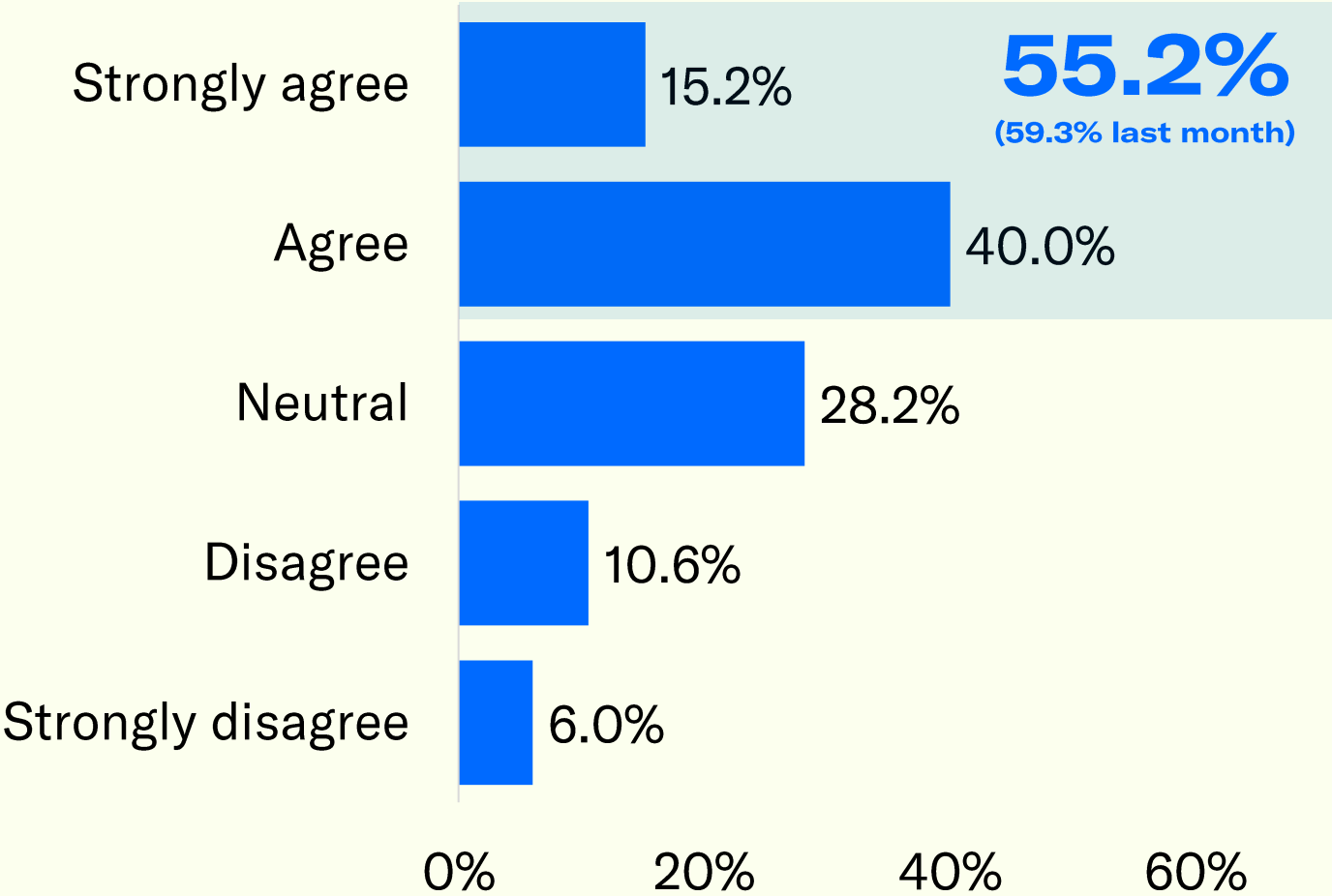
Across Generations, Most Travelers are Being Careful With Their Money Fearing Recession



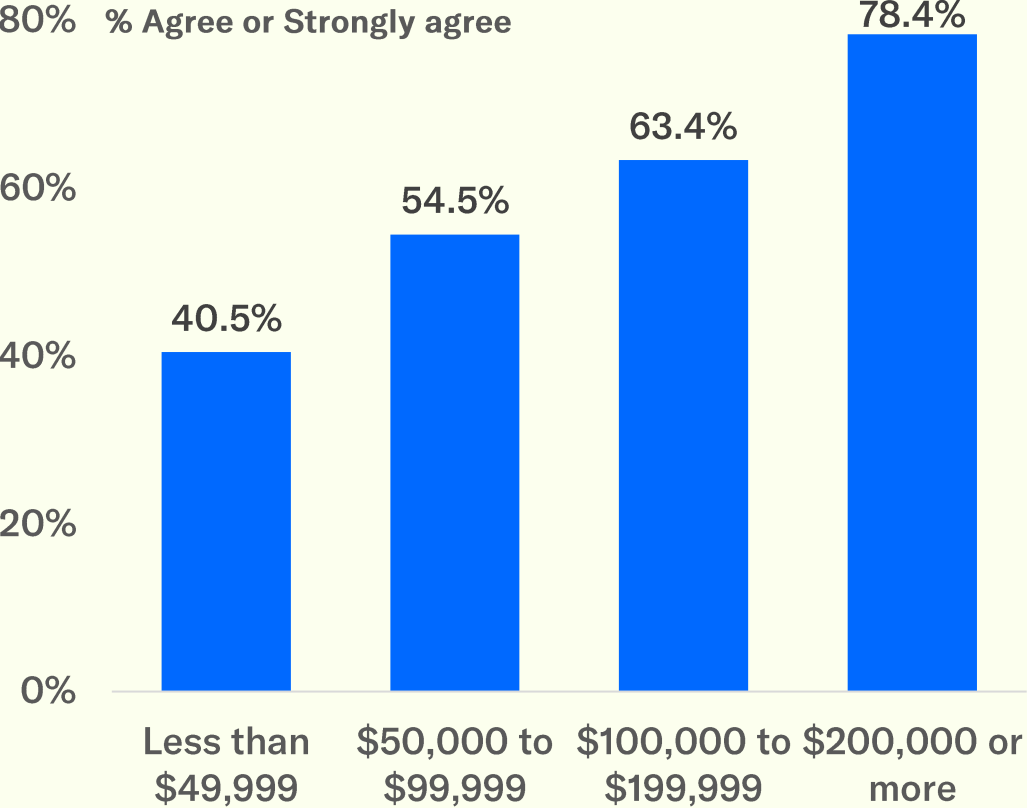
Still, Most Americans Agree that Travel is a Worthwhile Investment

Question:

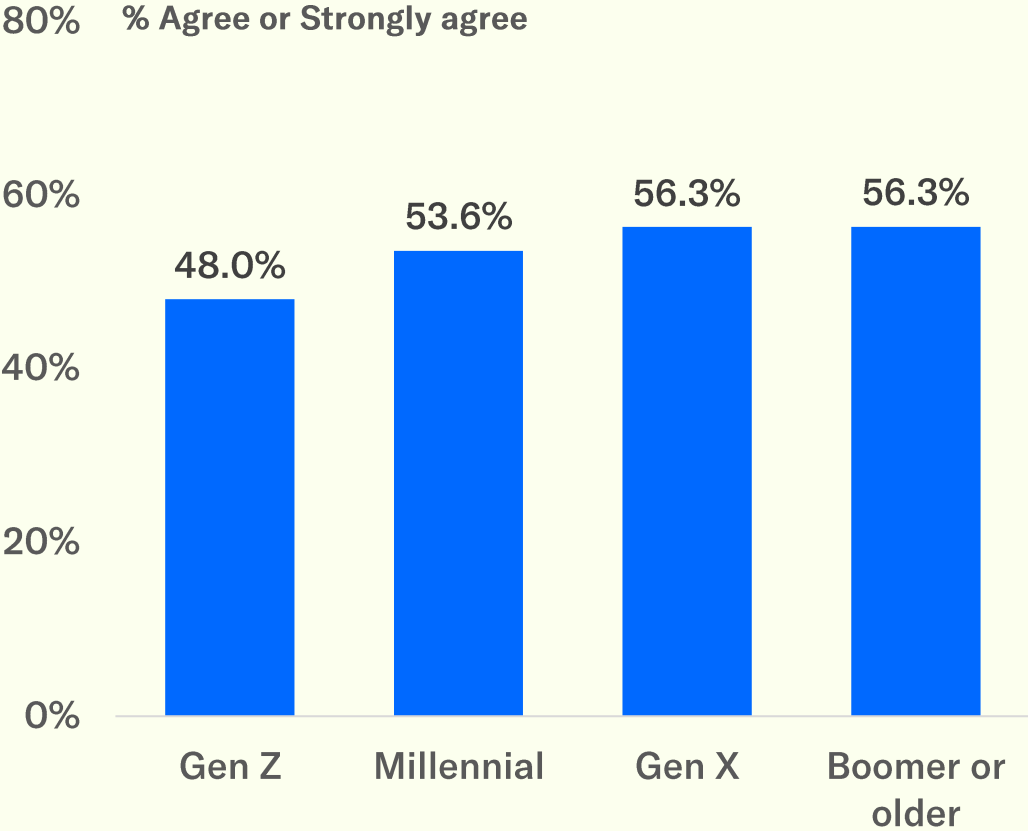
Even in an economic recession, I'd consider travel to be a worthwhile investment.



More Affluent Travelers See Travel as an Important Investment Even in Hard Times



Older Travelers Value Travel Somewhat More in Challenging Economic Situations



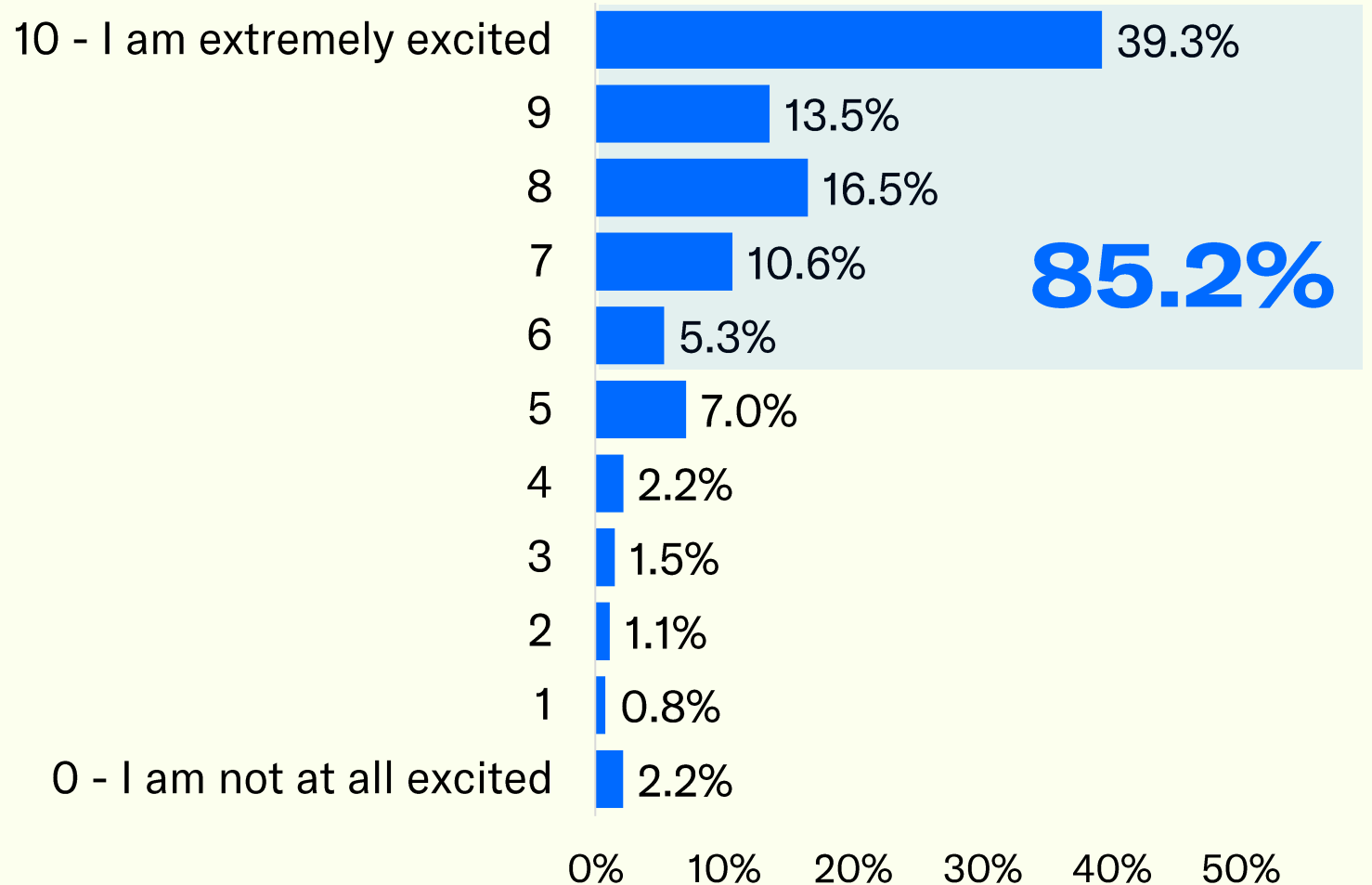


Americans' Current Travel Sentiment & Recent Travel

Excitement for Leisure Travel Has Noticeably Dipped

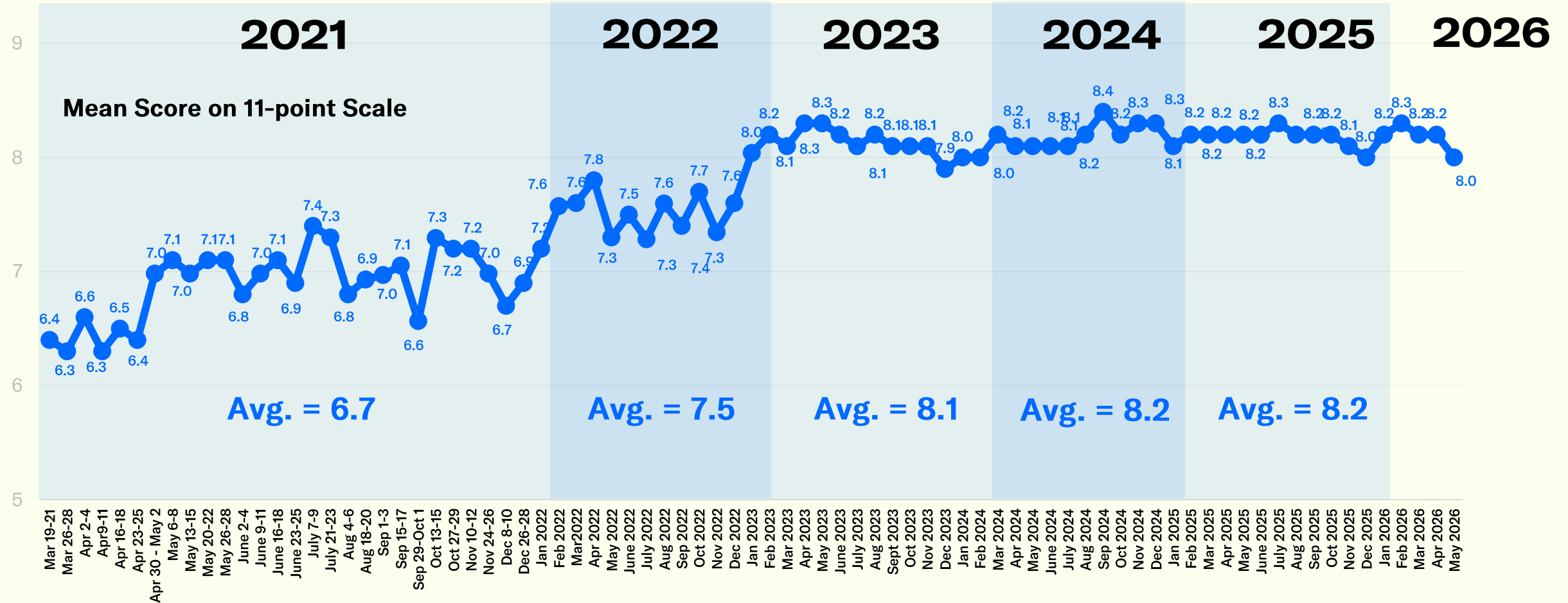
Question:

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



Excitement for Leisure Travel Has Noticeably Dipped

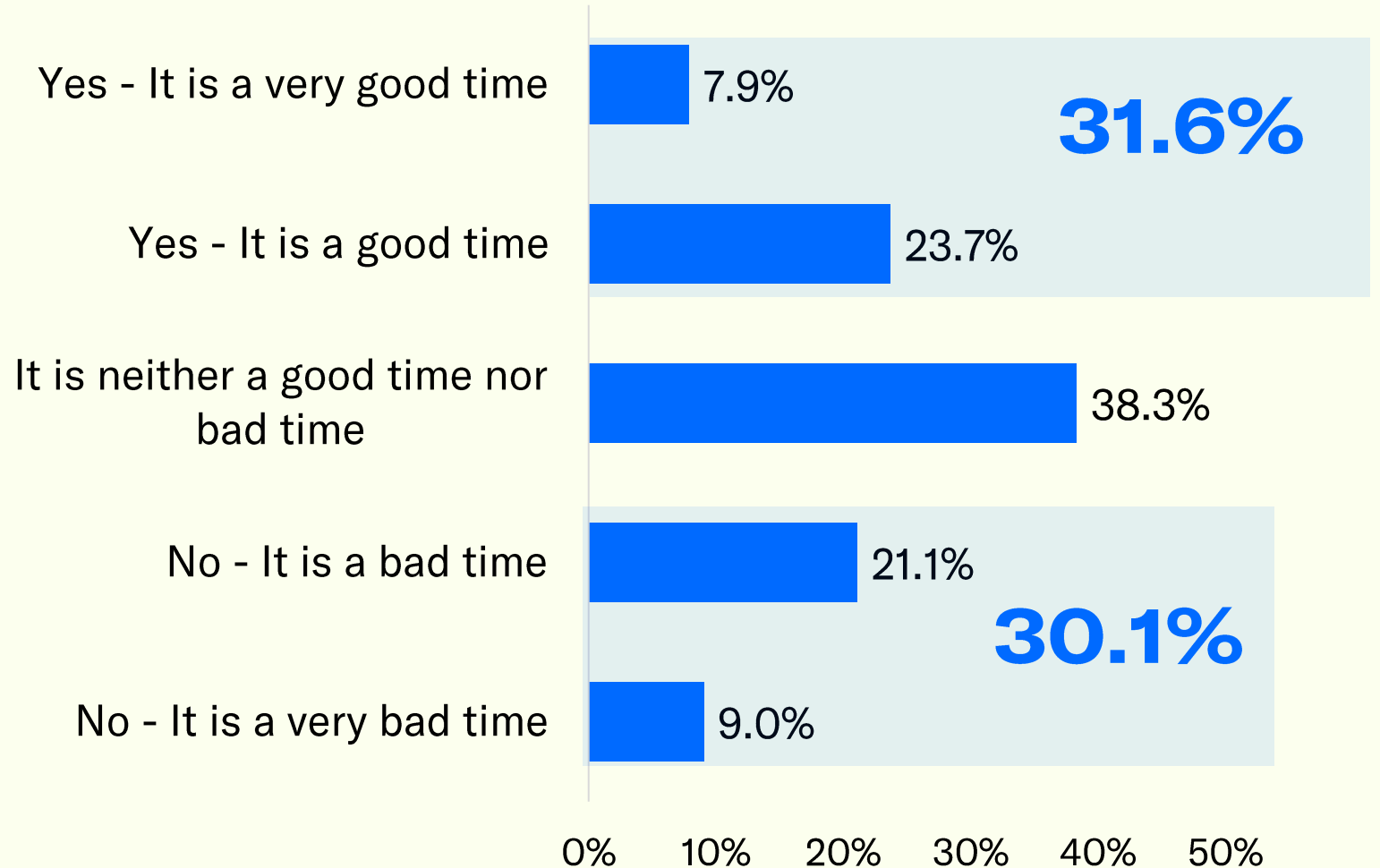
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Fewer Travelers Are Seeing Now as a Good Time to Spend on Travel

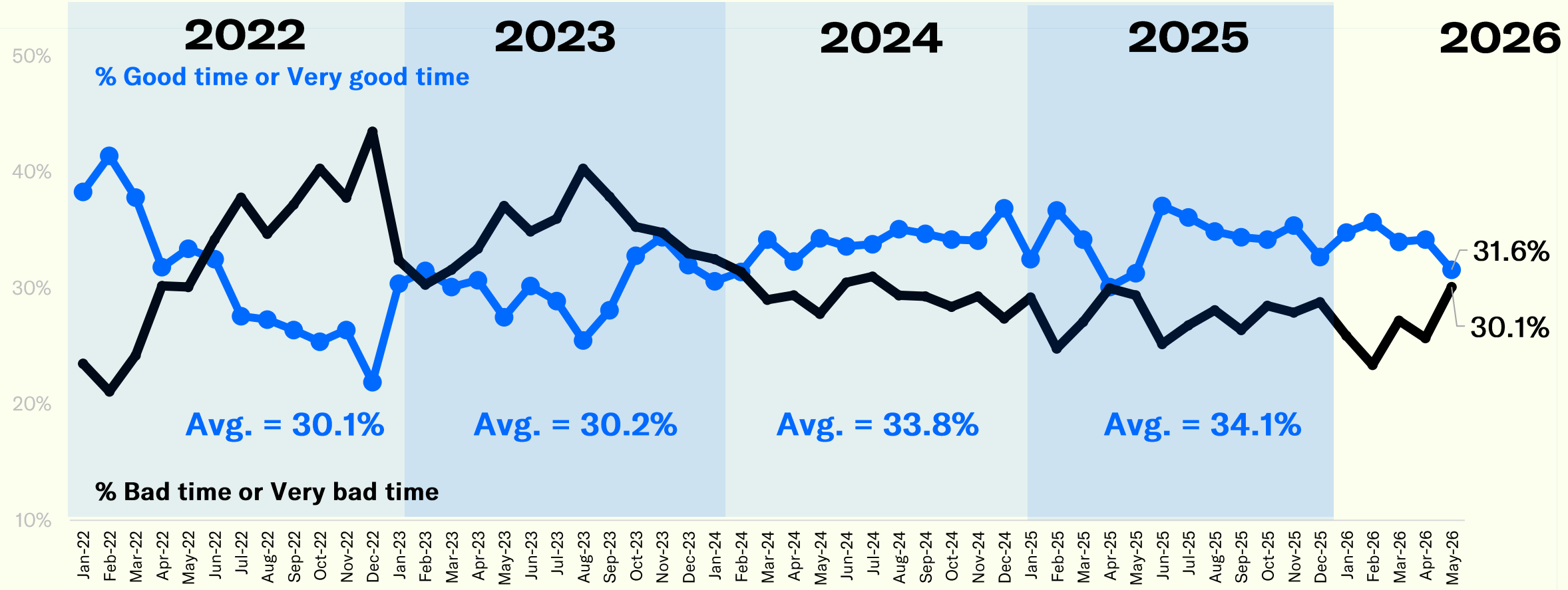
Question:

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?

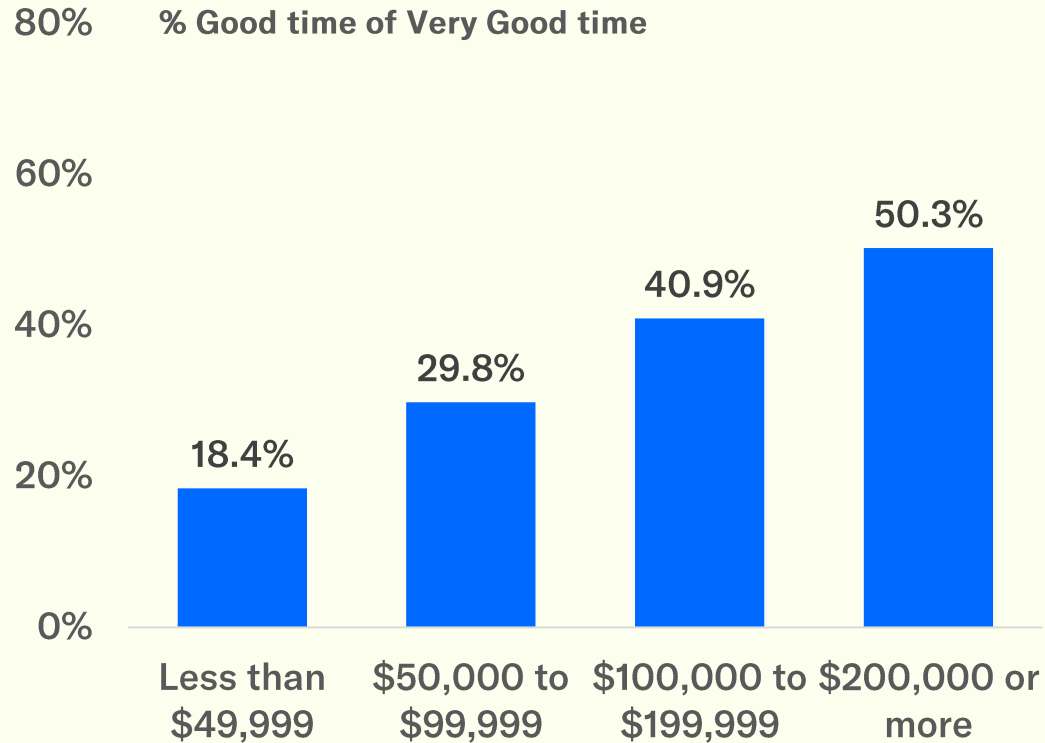


Fewer Travelers Are Seeing Now as a Good Time to Spend on Travel

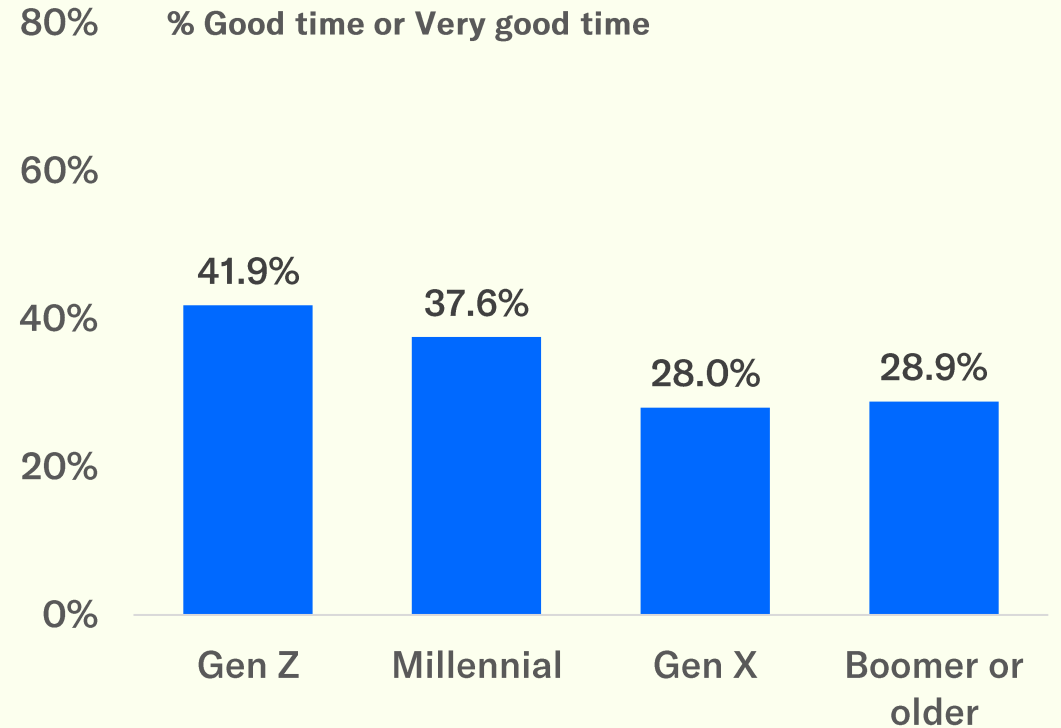
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



Higher Income Travelers Far More Likely to Feel Now is a Good Time to Spend on Travel



Older Travelers Least Likely Age Cohort to Think Now is a Good Time to Spend on Travel

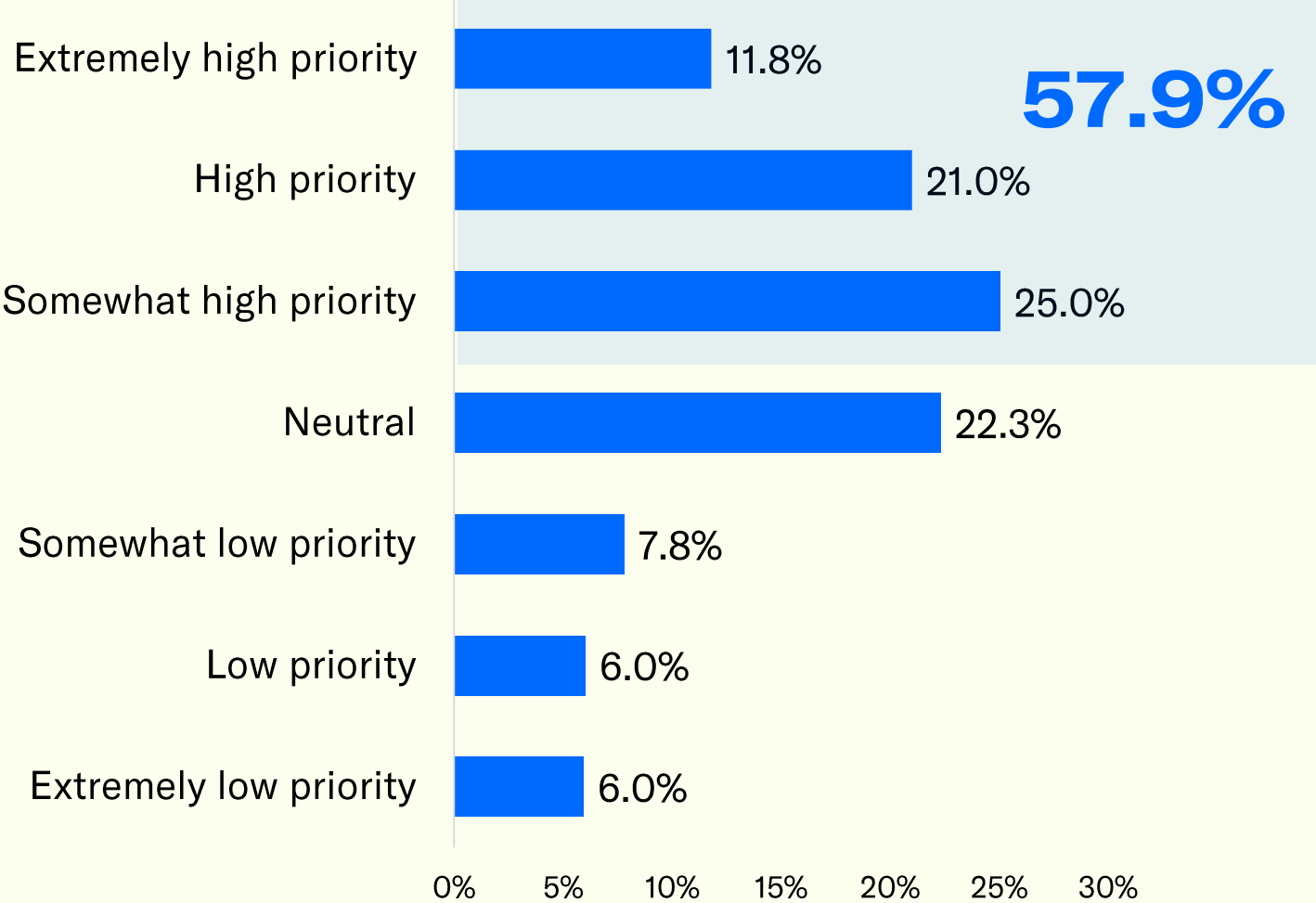


Travel Still Claims a Top Spot Among Consumer Spending Priorities

Question:

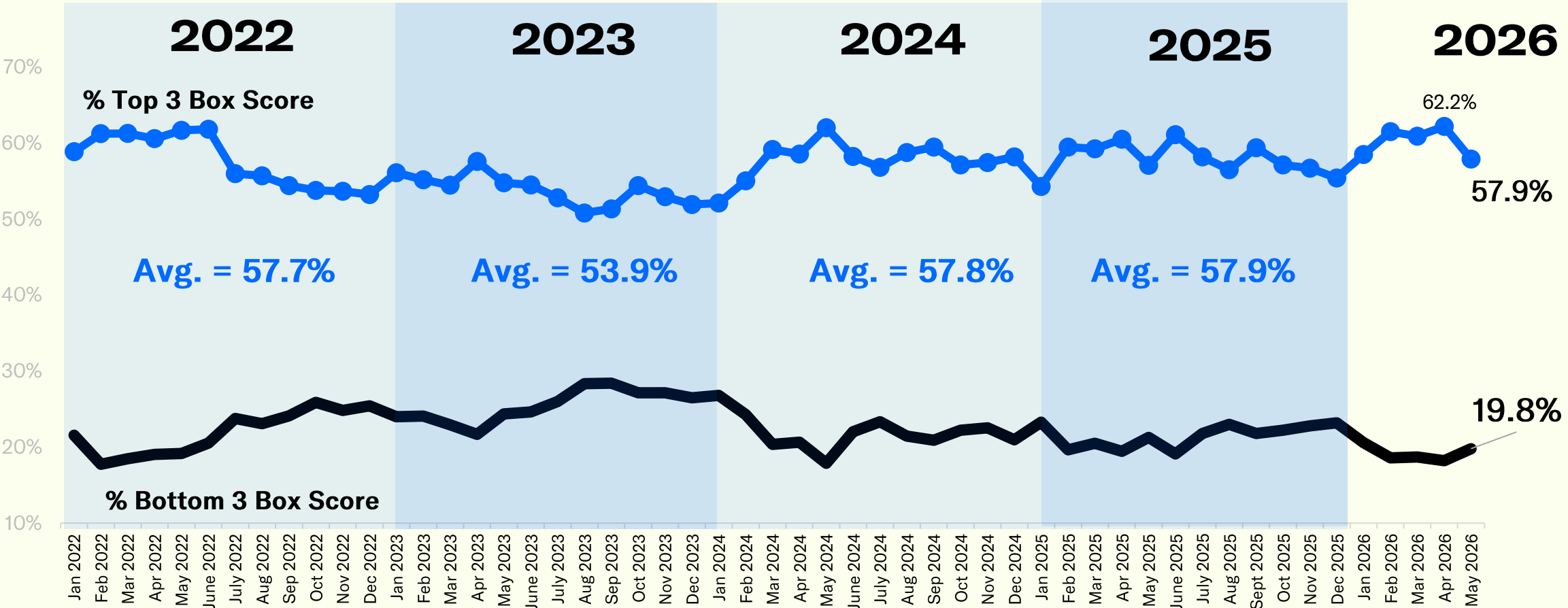
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.

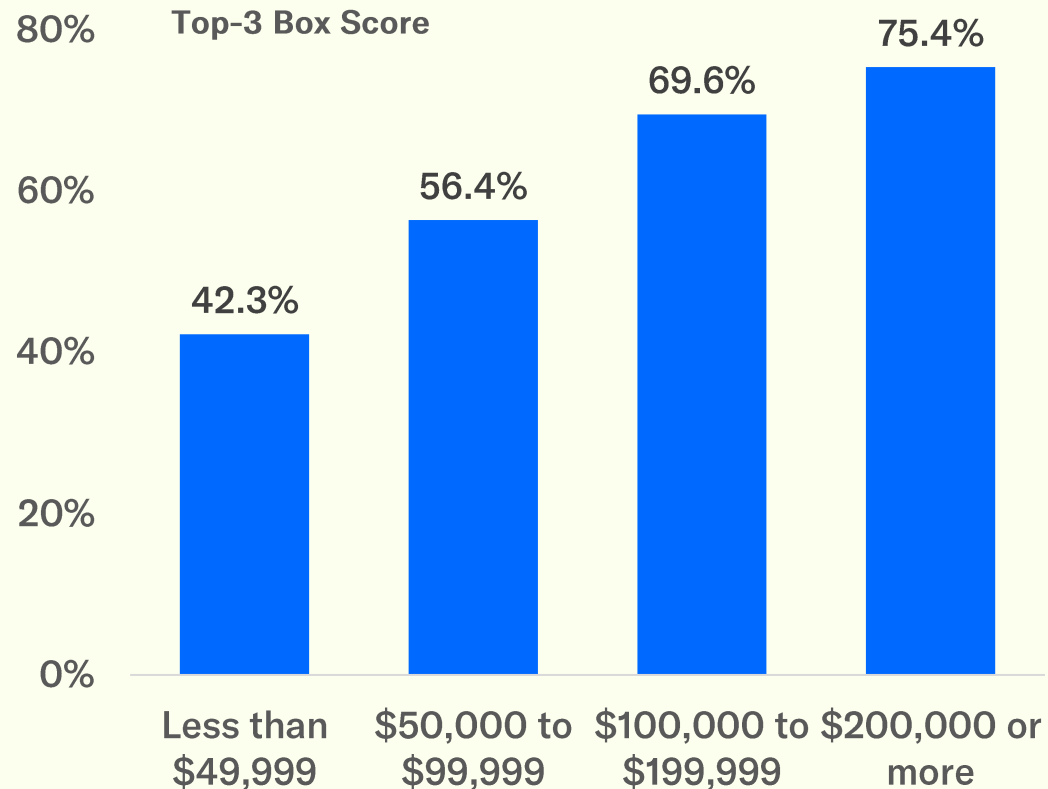


Travel Spending Priority Dips Down This Month

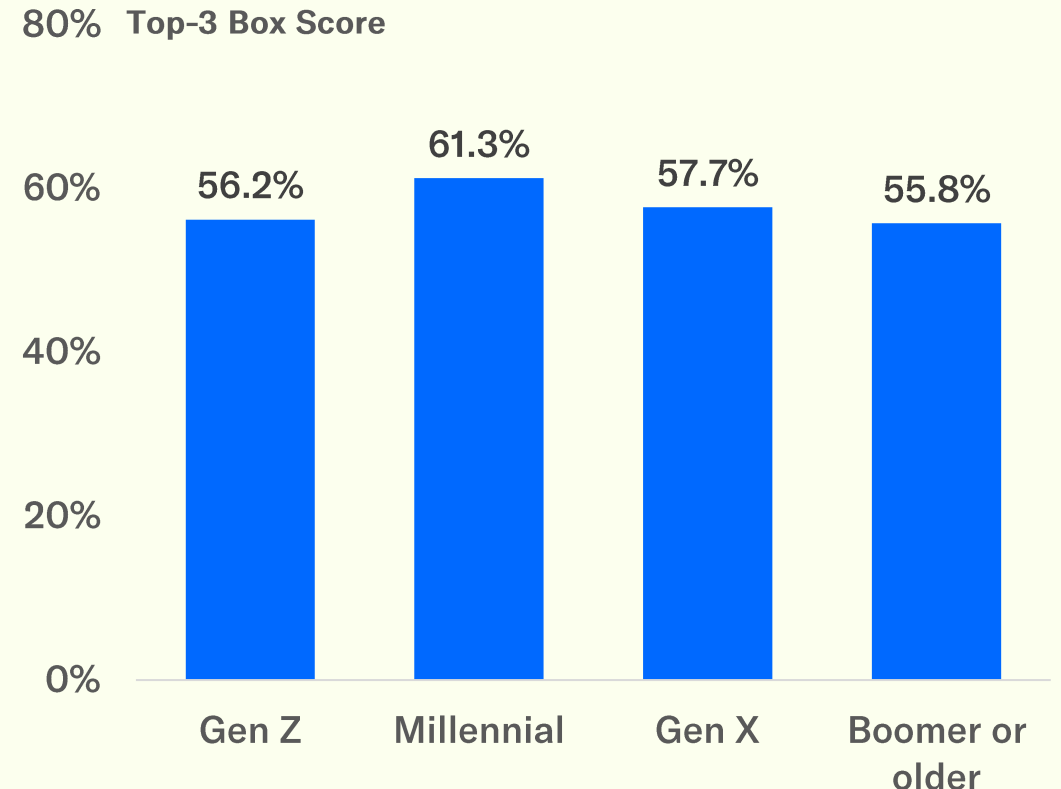
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



Higher Income Travelers are Prioritizing Travel in Their Budgets



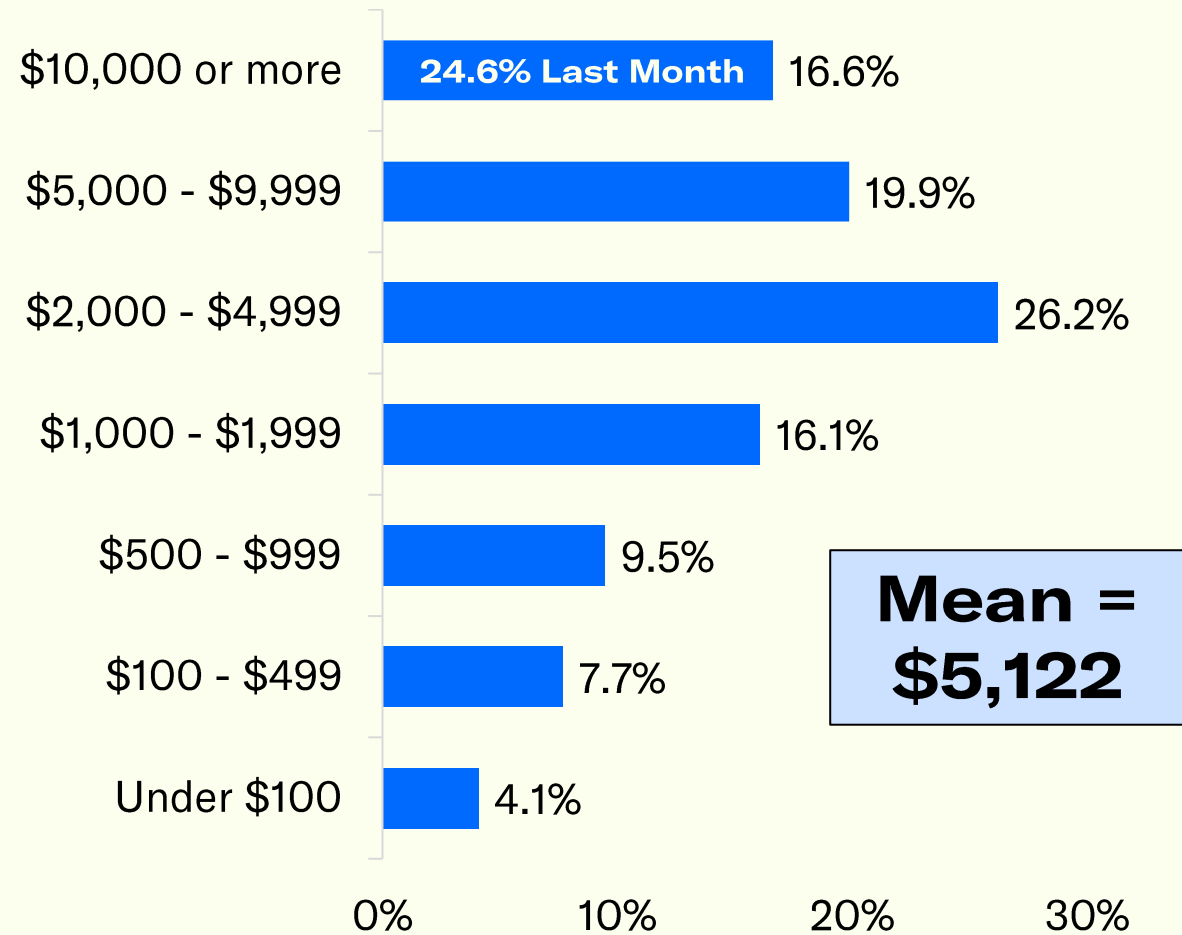
Millennials Are the Generation Most Likely to Prioritize This Spending



Average Expected Leisure Travel Budgets Drop Sharply.

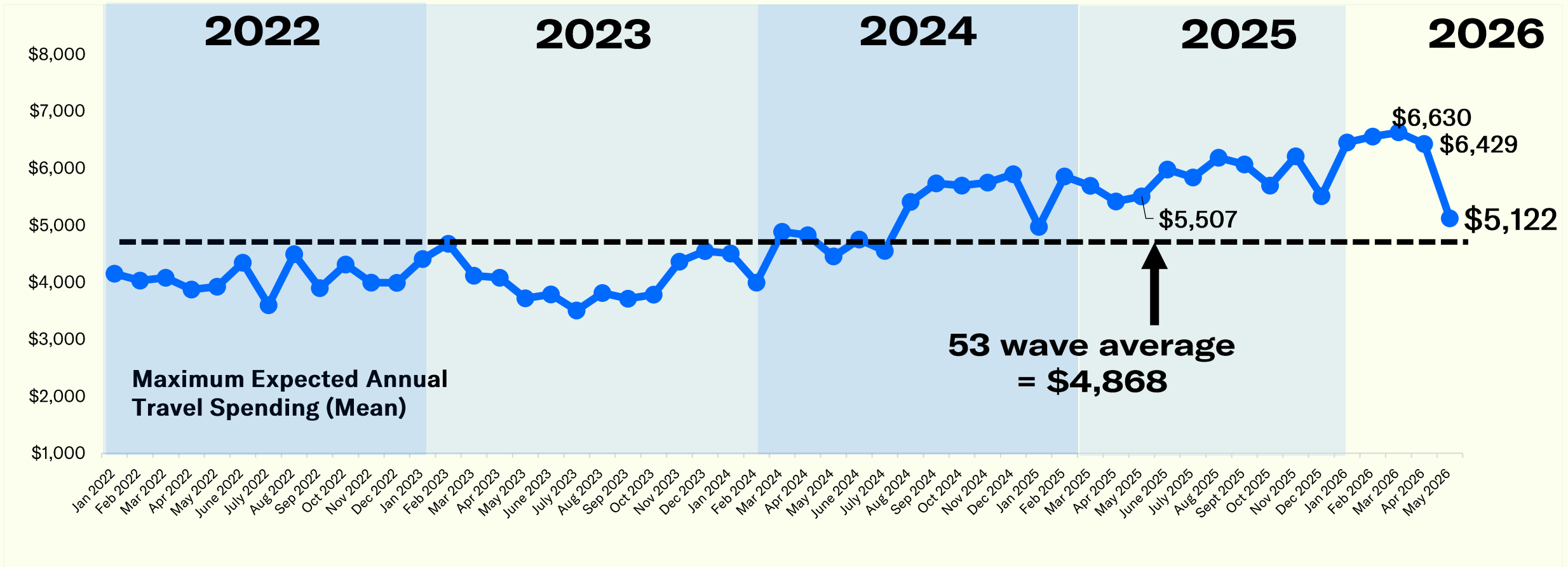
Question:

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?



American Expectations for Travel Spending Drop Sharply

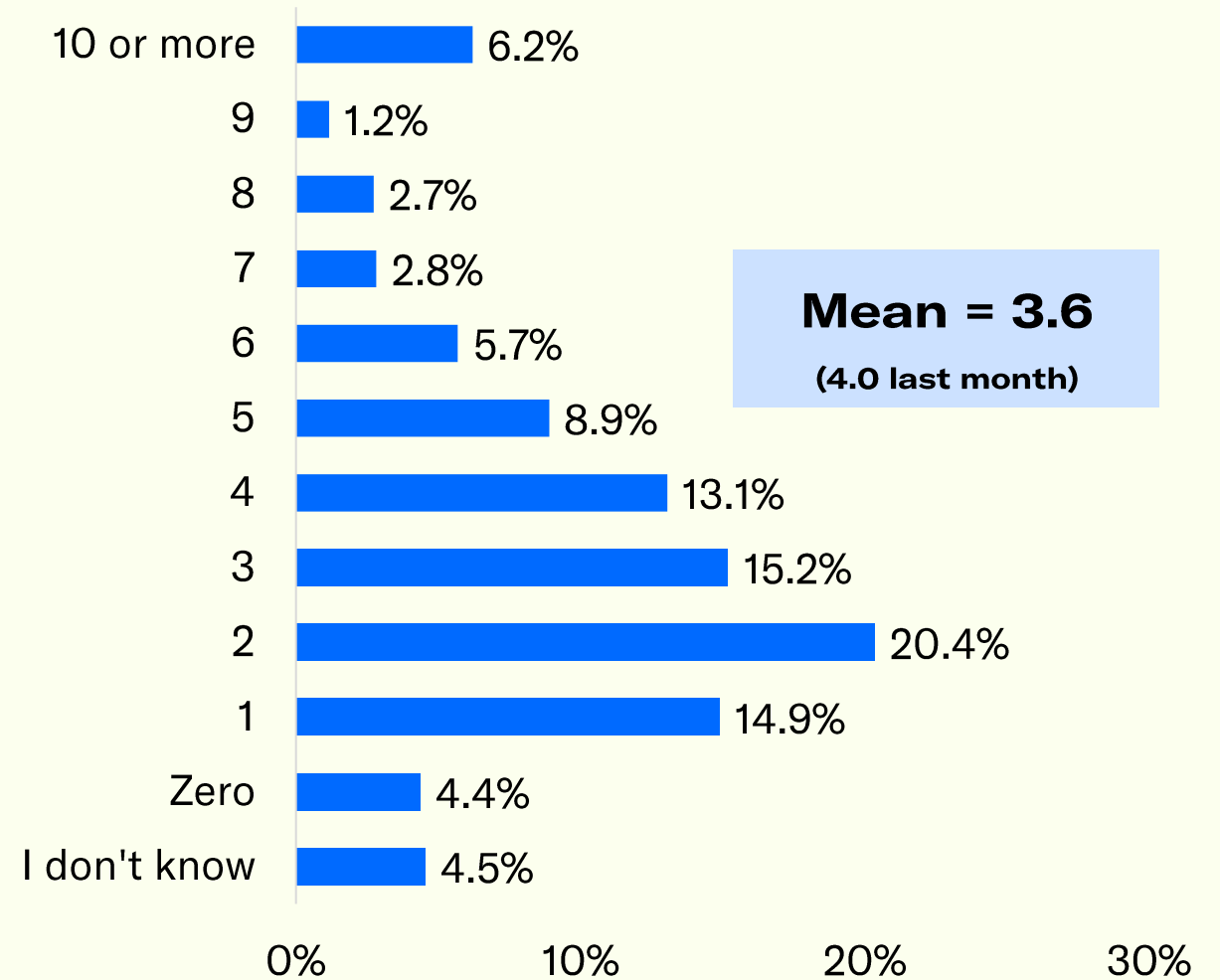
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



The Average American is Planning Only 3.6 Leisure Trips in the Next Year

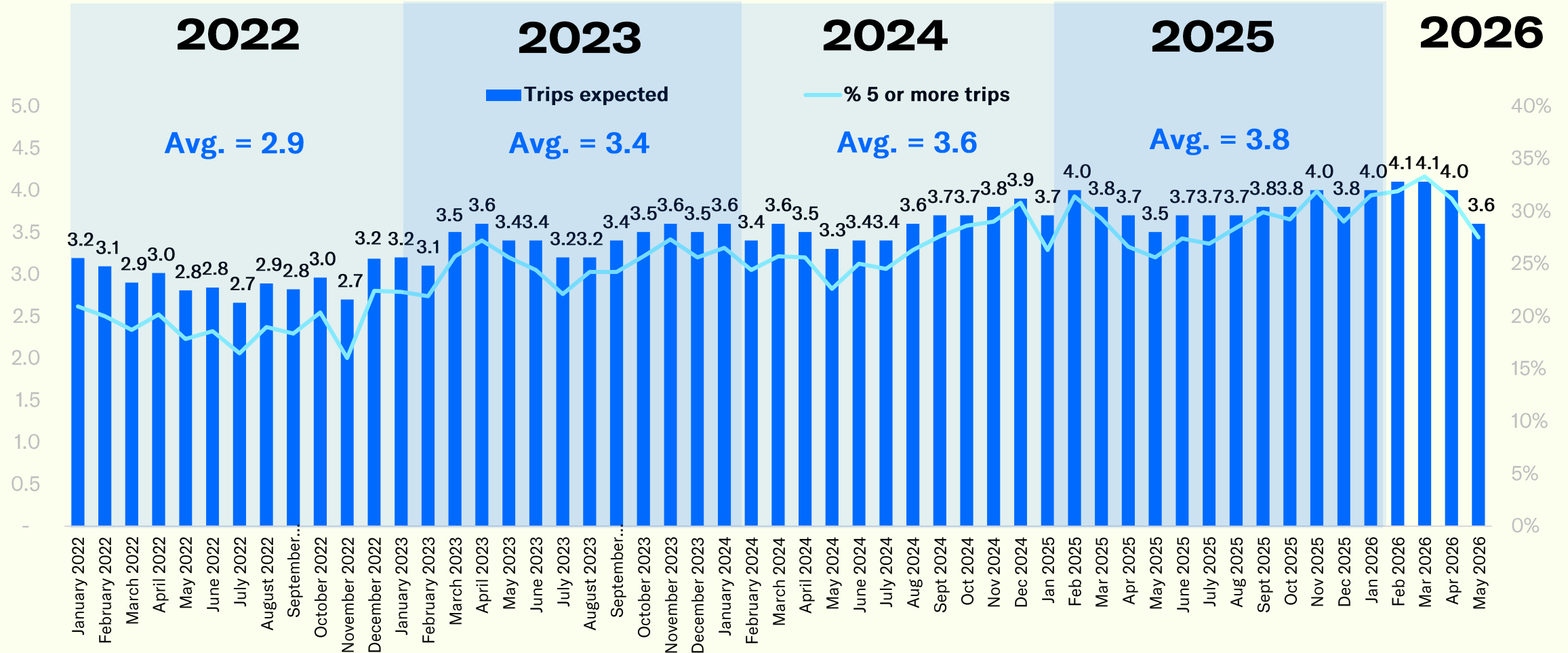
Question:

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

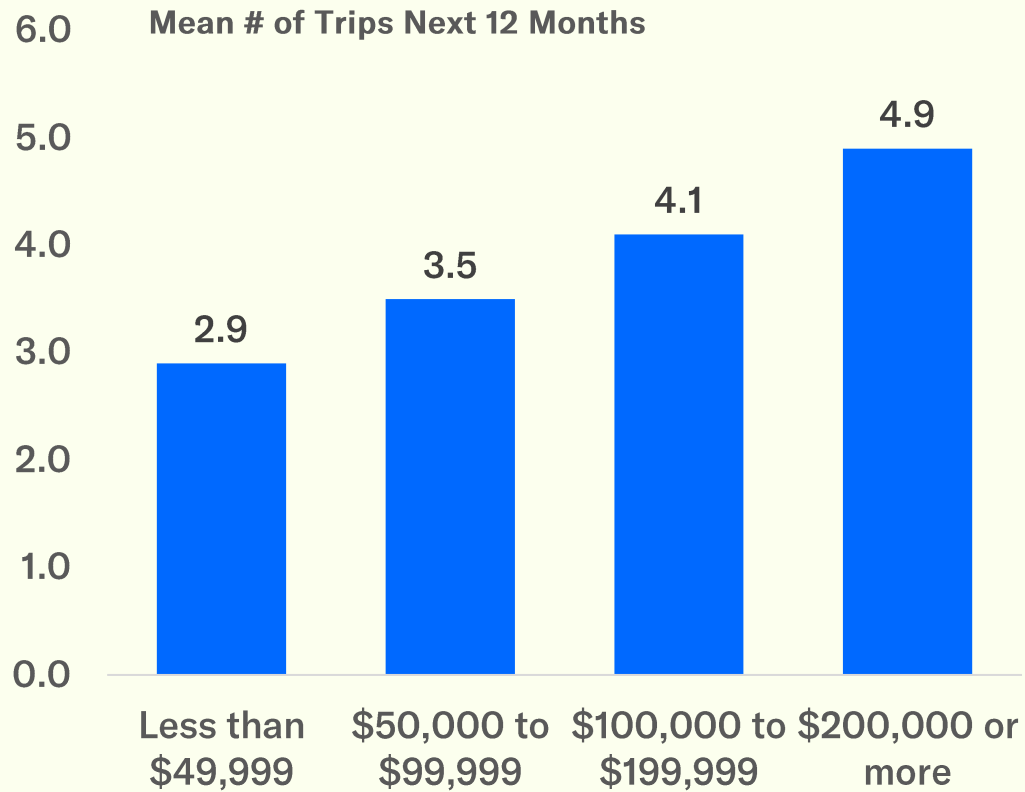


Trip Expectations Fell Sharply This Month

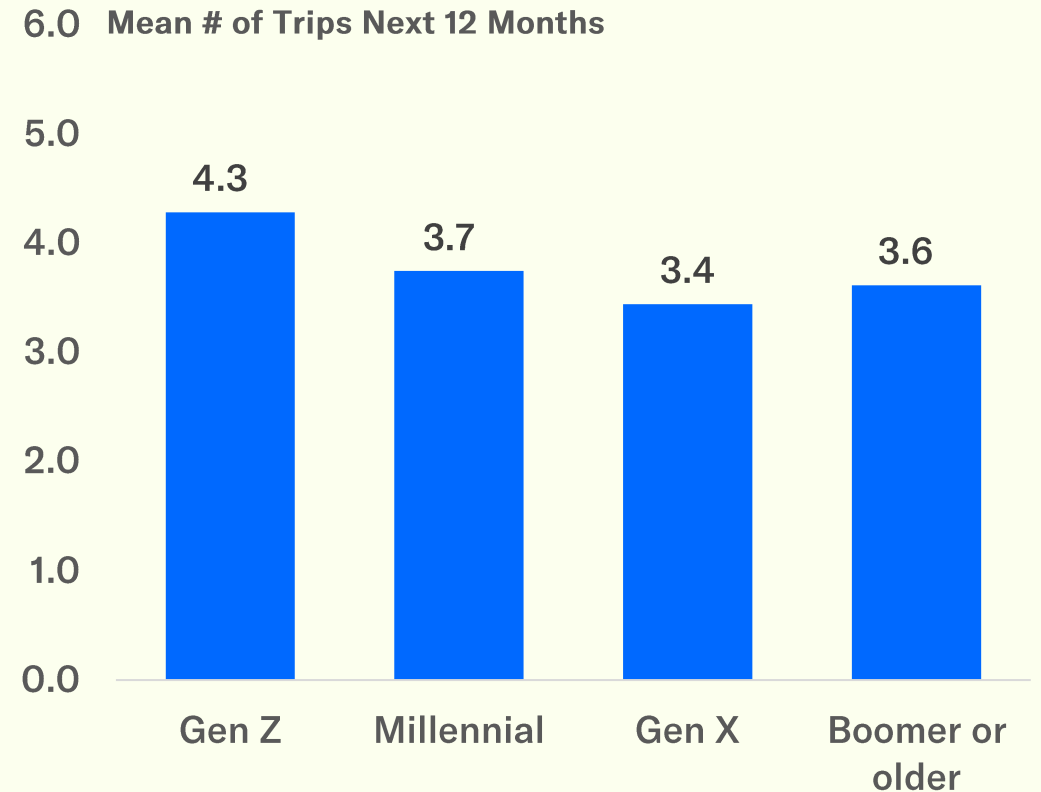
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in next 12 months?



Higher Income Travelers have the greatest volume of leisure trips expected

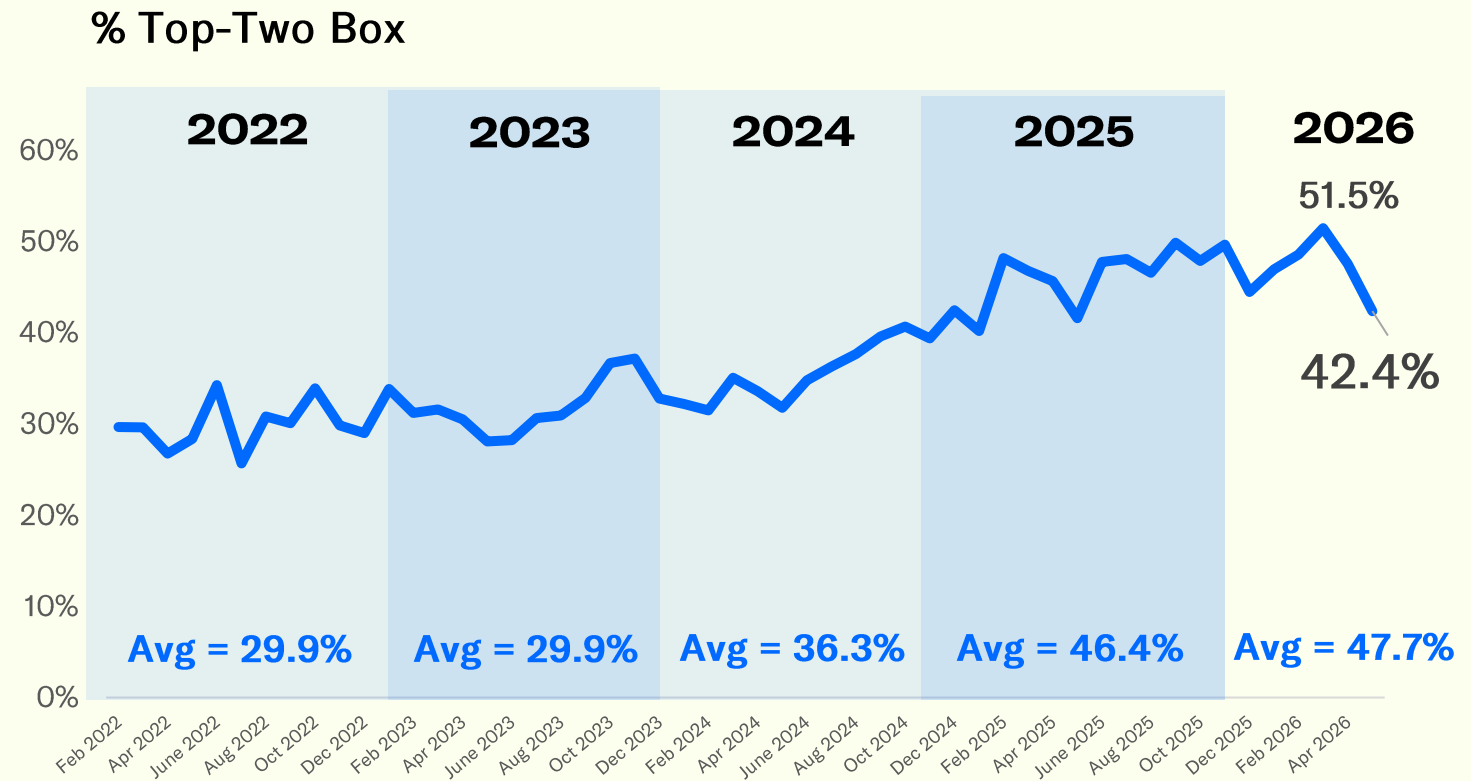
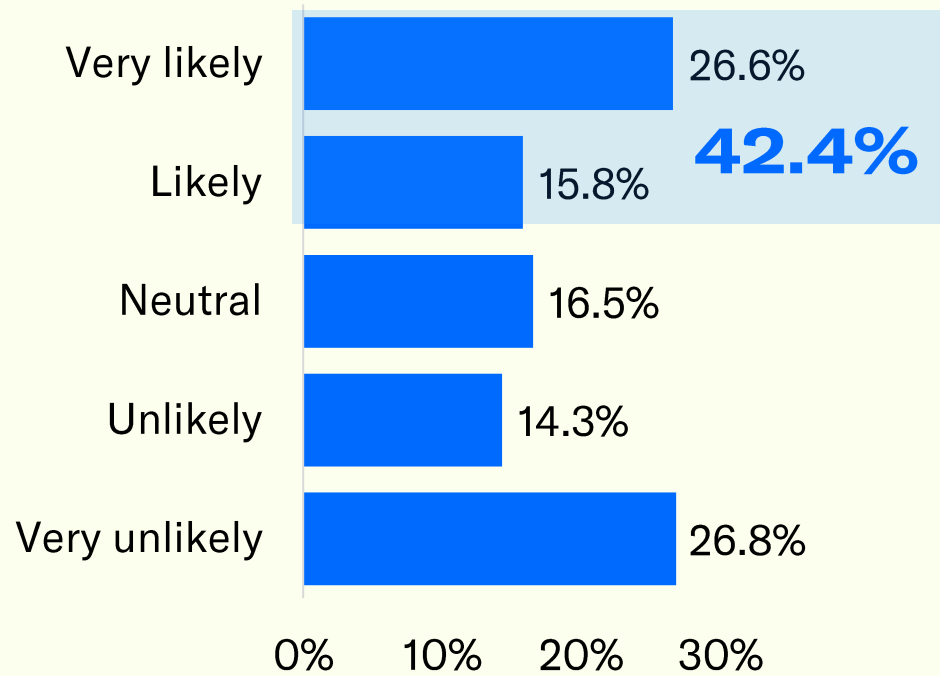


Gen Z leads other generations in anticipated trip volume



Travel Outside the USA Remains Popular, But is in Decline

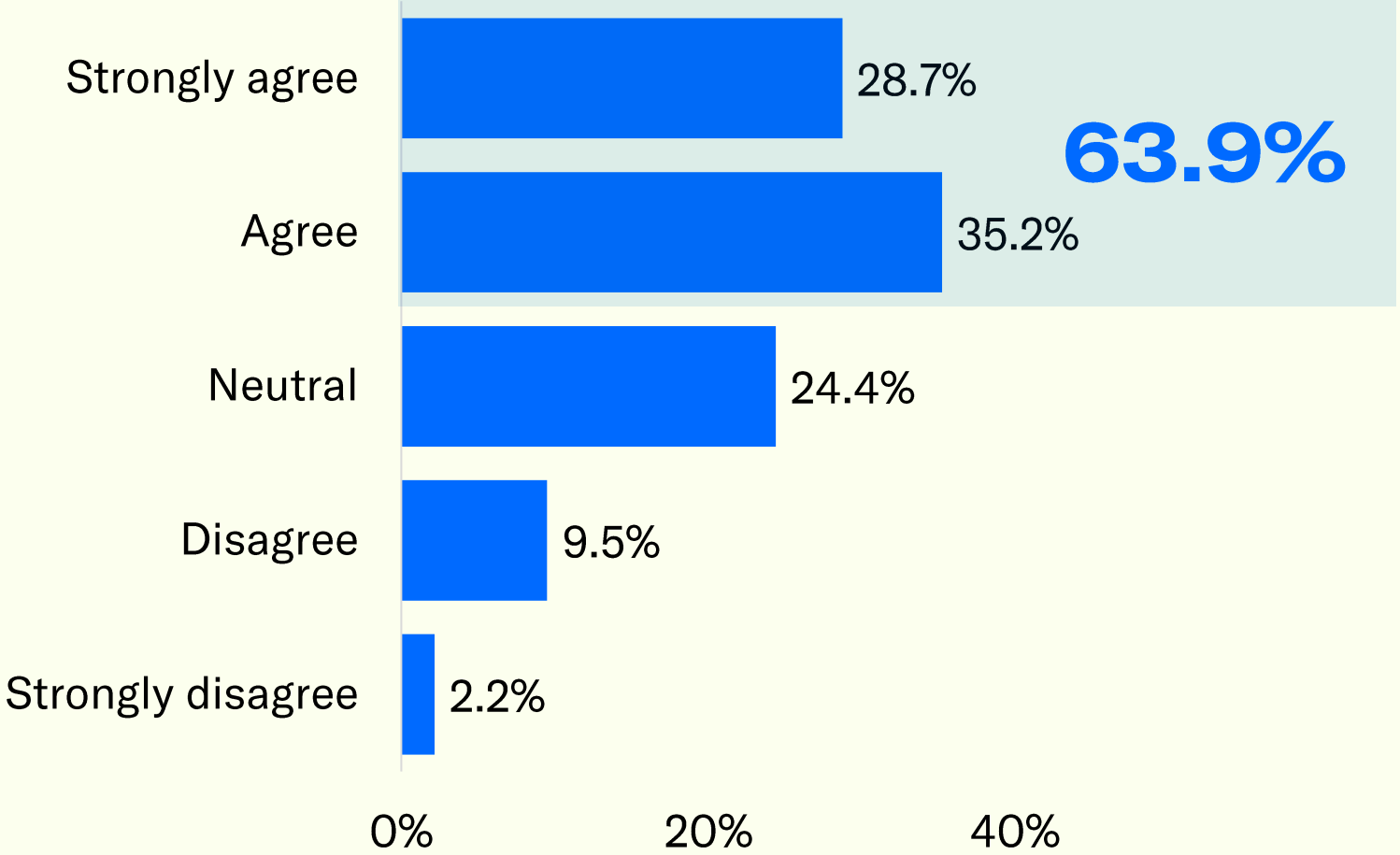
Question: How likely are you to travel outside the United States for leisure in the NEXT 12 MONTHS?



Nearly 2-in-3 Think Americans Are Not as Welcome Abroad as They Once Were.

Statement Agreement:

I worry that Americans may not be as welcome abroad as they once were.



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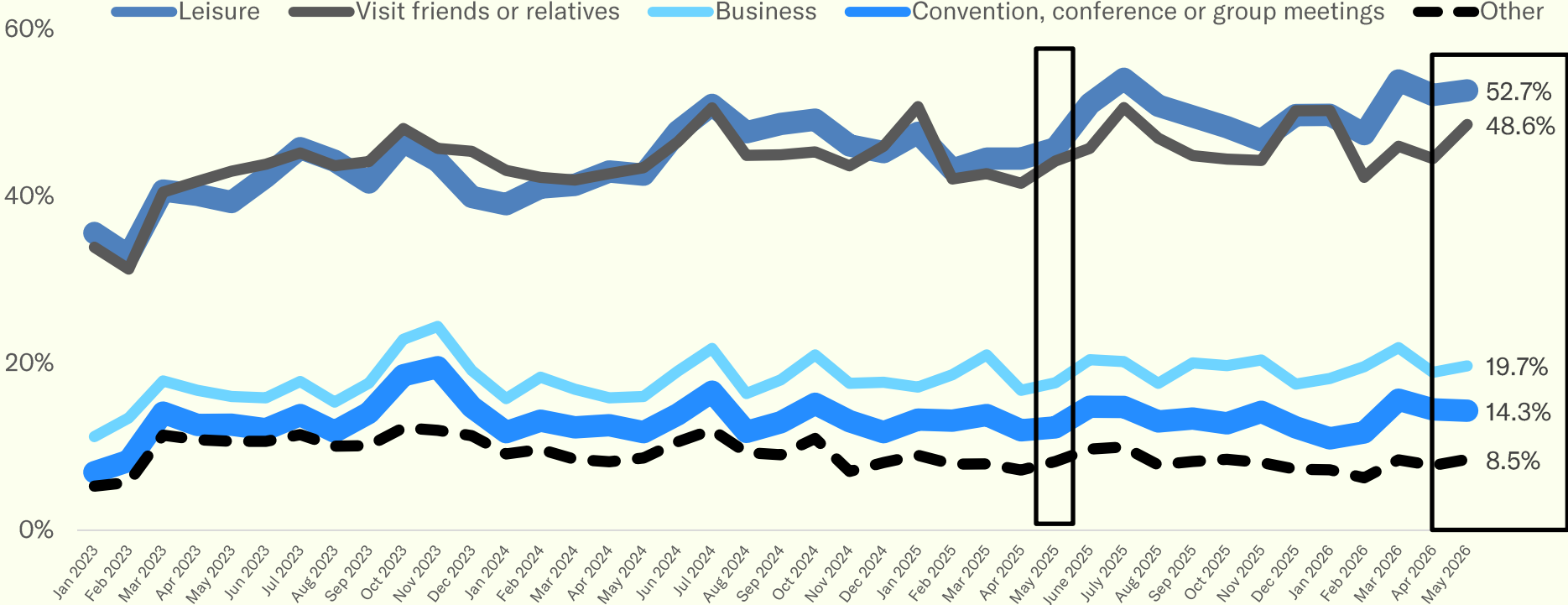
**Questions? *Scan
Here & Our Team
Will be in Touch!***



Recent Travel Activity Holds Firm Despite Softening Sentiment

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)

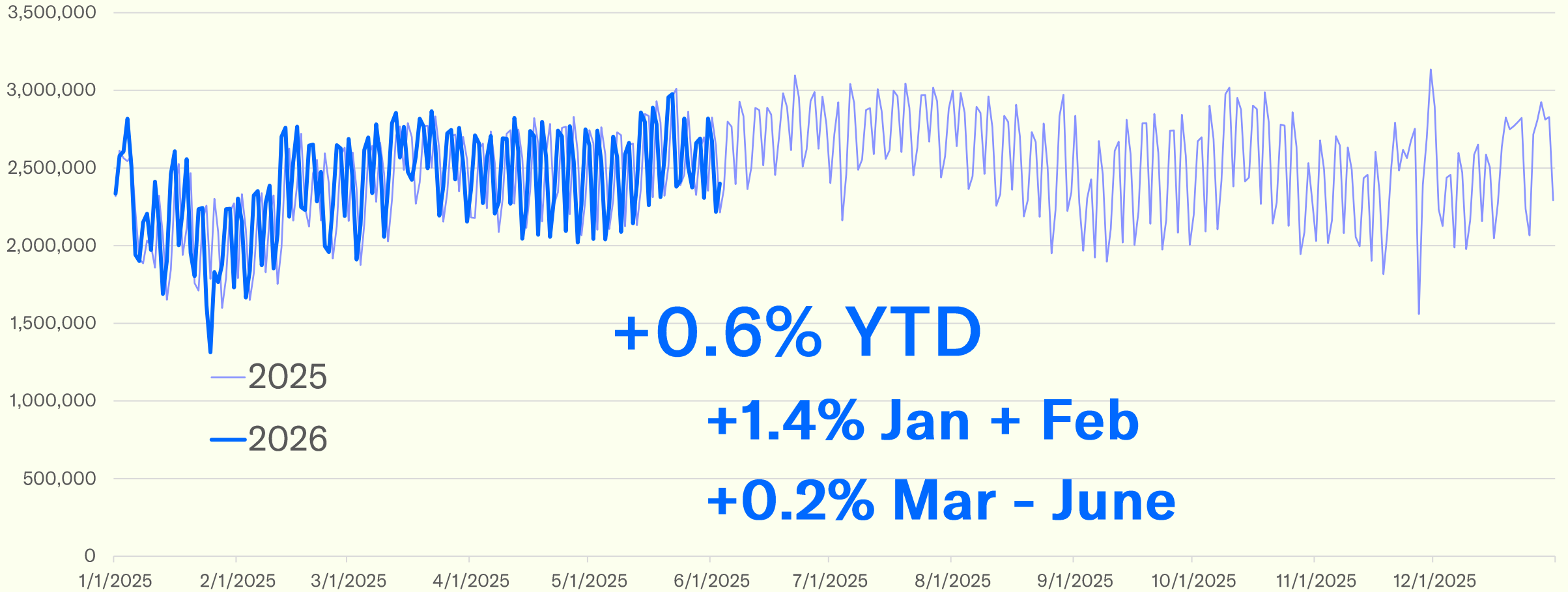
% Who Have Taken 1 or More Overnight Trips in the Past Month



	May 2025	May 2026
Leisure	45.7%	52.7%
VFR	44.2%	48.6%
Business	17.6%	19.7%
Group Meeting	12.3%	14.3%

Year-Over-Year Air Travel Growth Decelerates

2026 and 2025 TSA checkpoint travel numbers



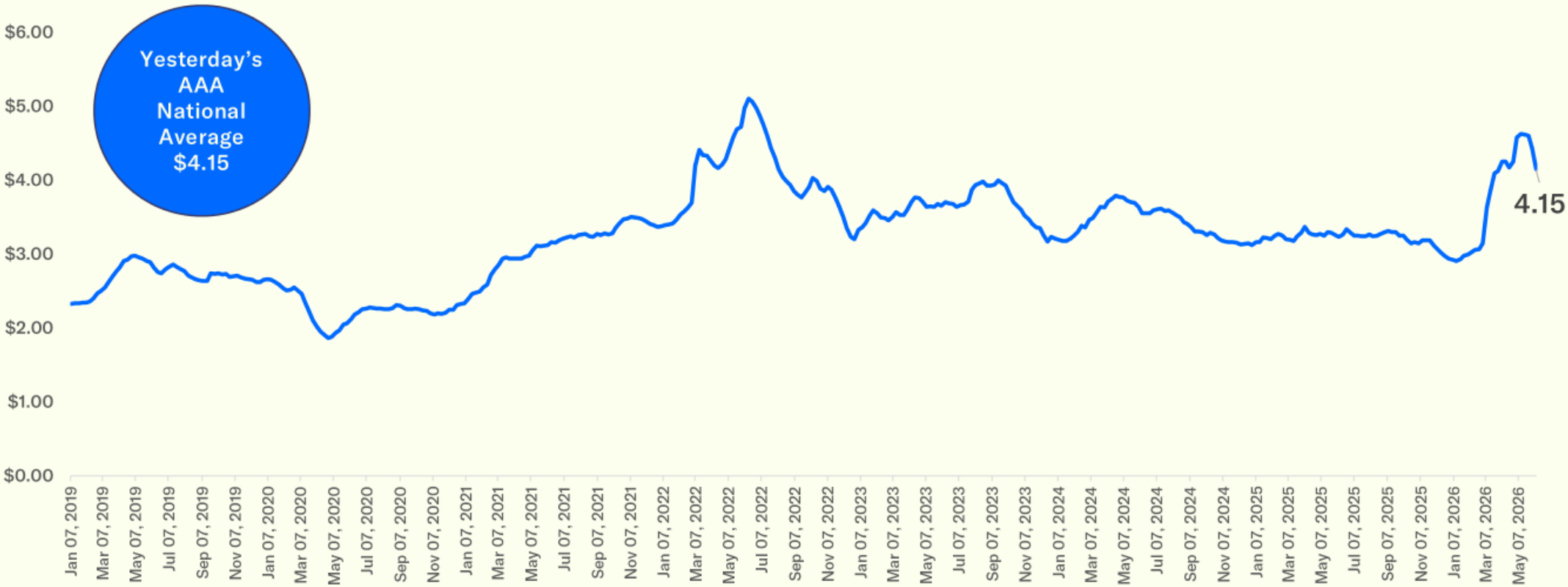


American Traveler Trade Offs

Gasoline Prices Reached \$4.15/Gallon Yesterday

(Last month at this time \$4.58)

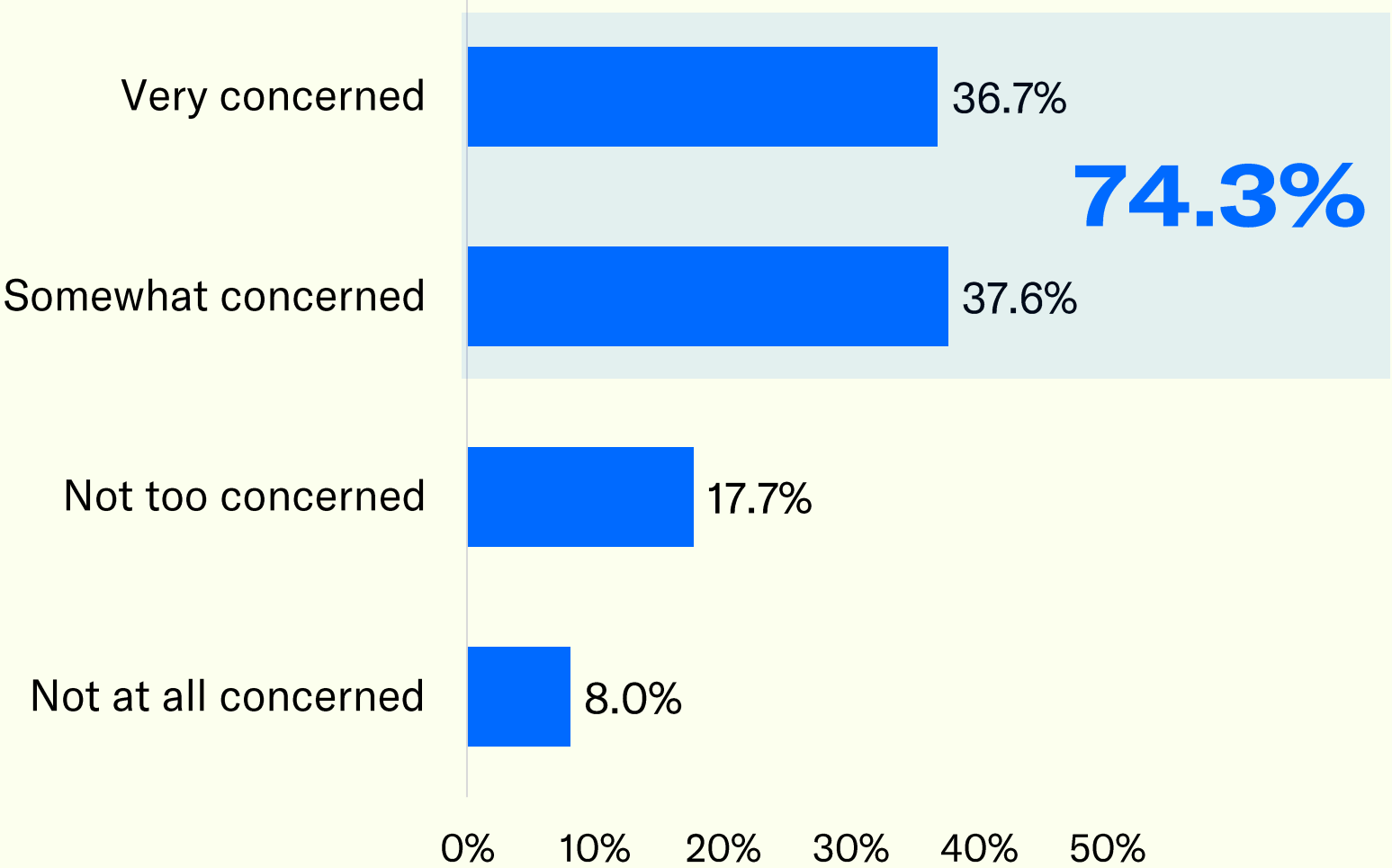
Weekly U.S. All Grades All Formulations Retail Gasoline Prices (Dollars per Gallon)



Concerns About Fuel Costs are Very High

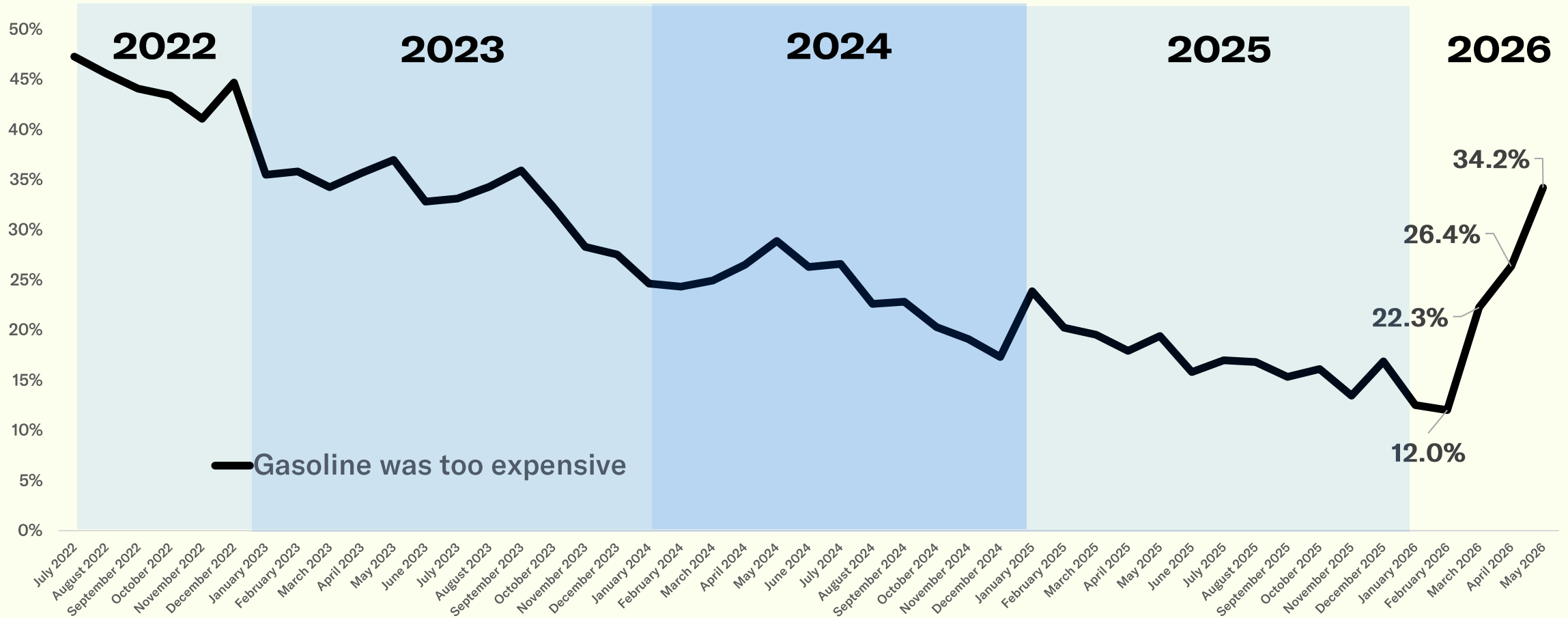
Question:

How concerned are you about fuel costs affecting your ability to travel this summer?



Gas Prices as a Deterrent to Travel Grows Sharply

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)

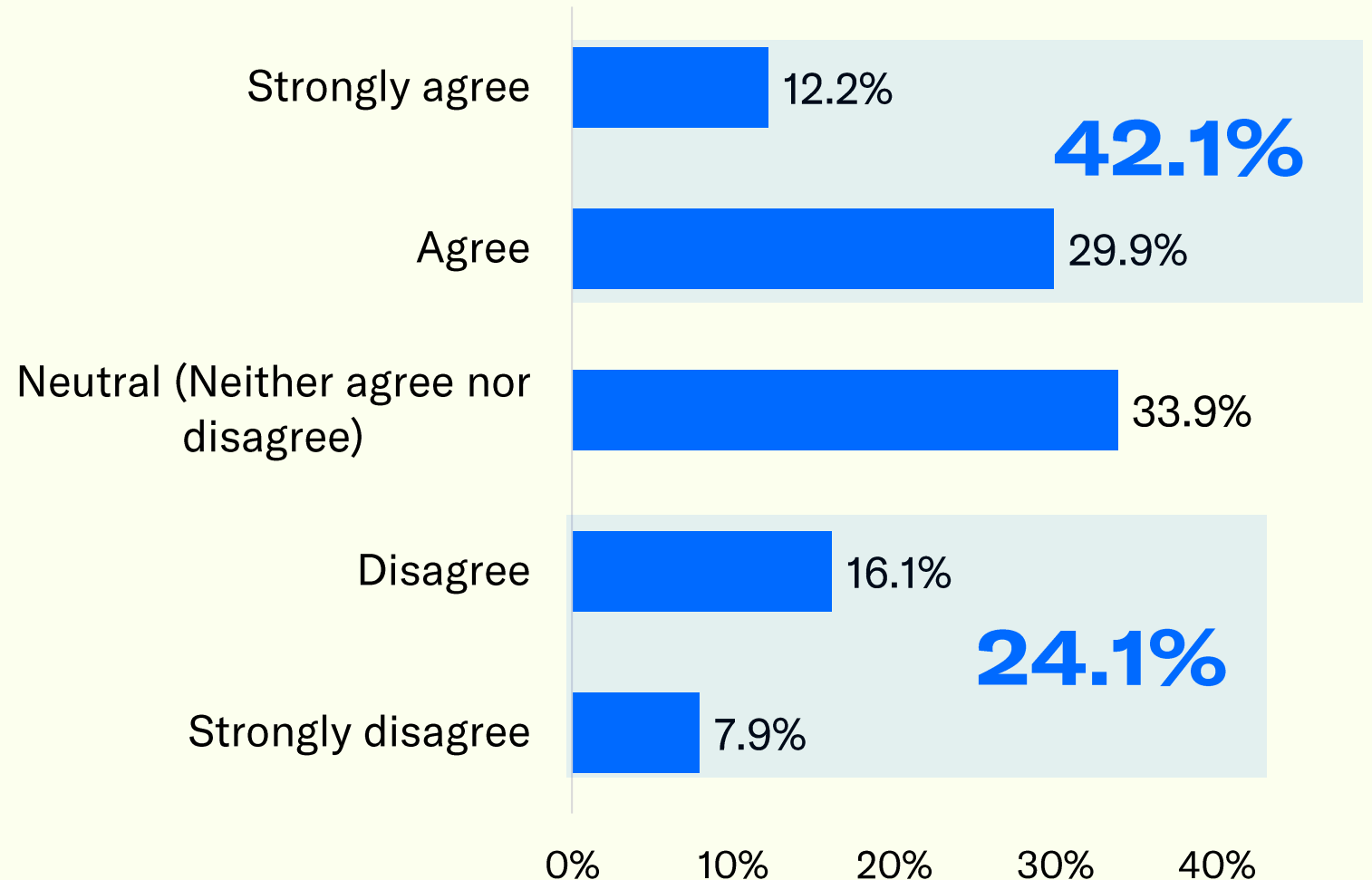


Most Would First Look Beyond Travel to Save if Necessary

Statement Agreement:

How much do you agree or disagree with the following statement?

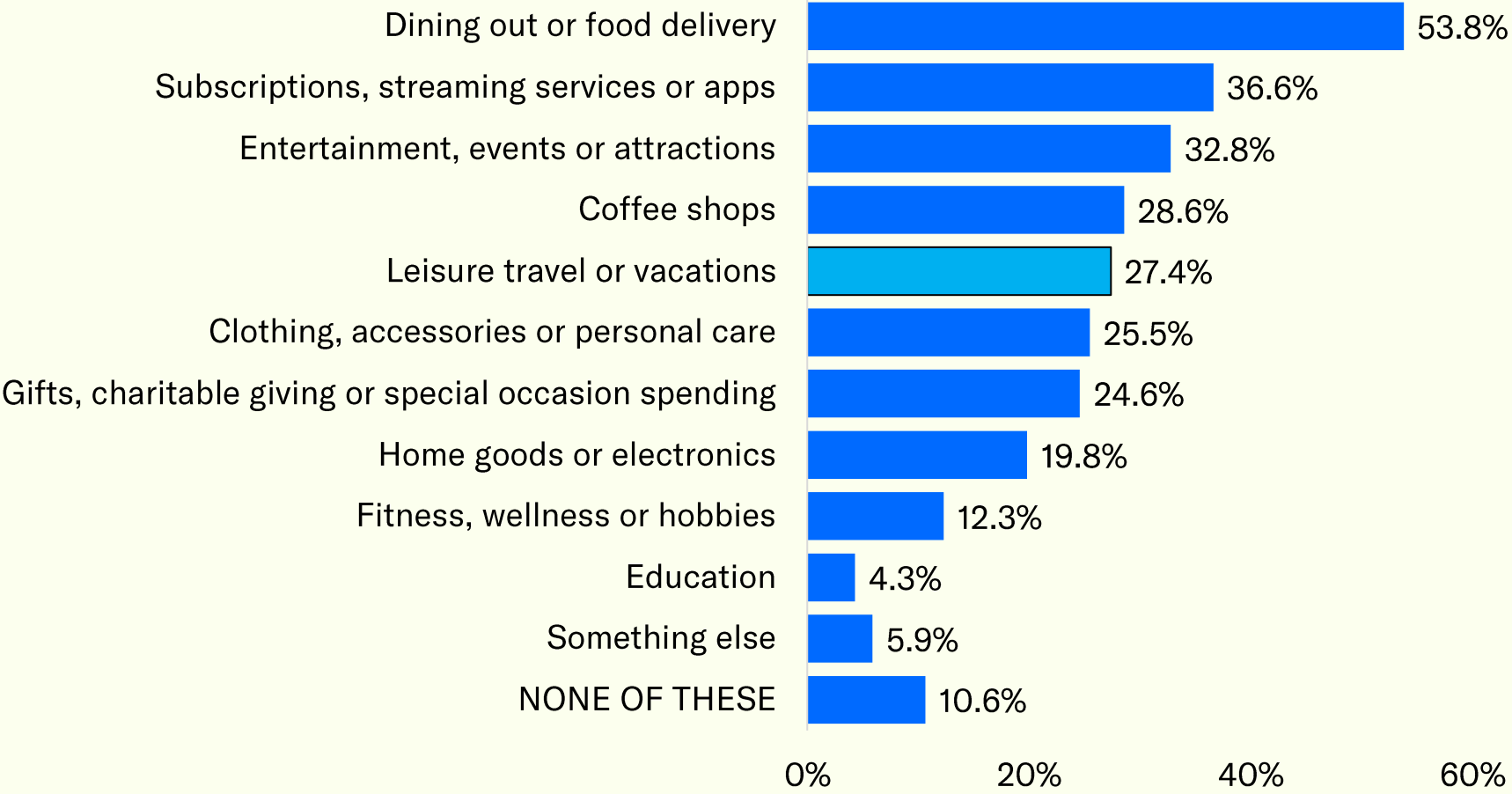
Thinking about summer 2026, I am more willing to cut back on everyday spending than cut back on spending on travel.



Dining Out and Food Delivery Would be the First Places Travelers Look to Cut Spending

Question:

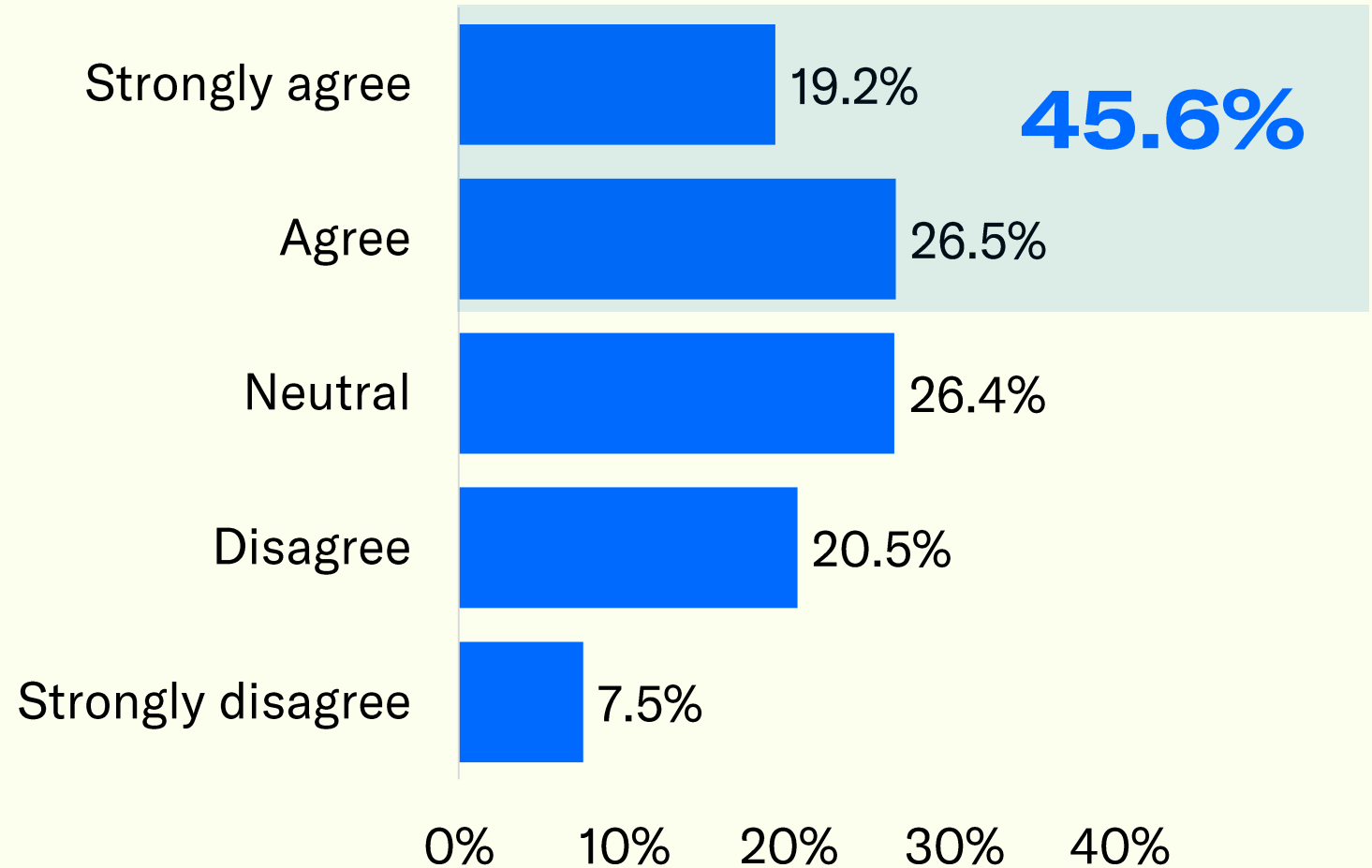
If you needed to reduce your household budget, what would you cut back on first?



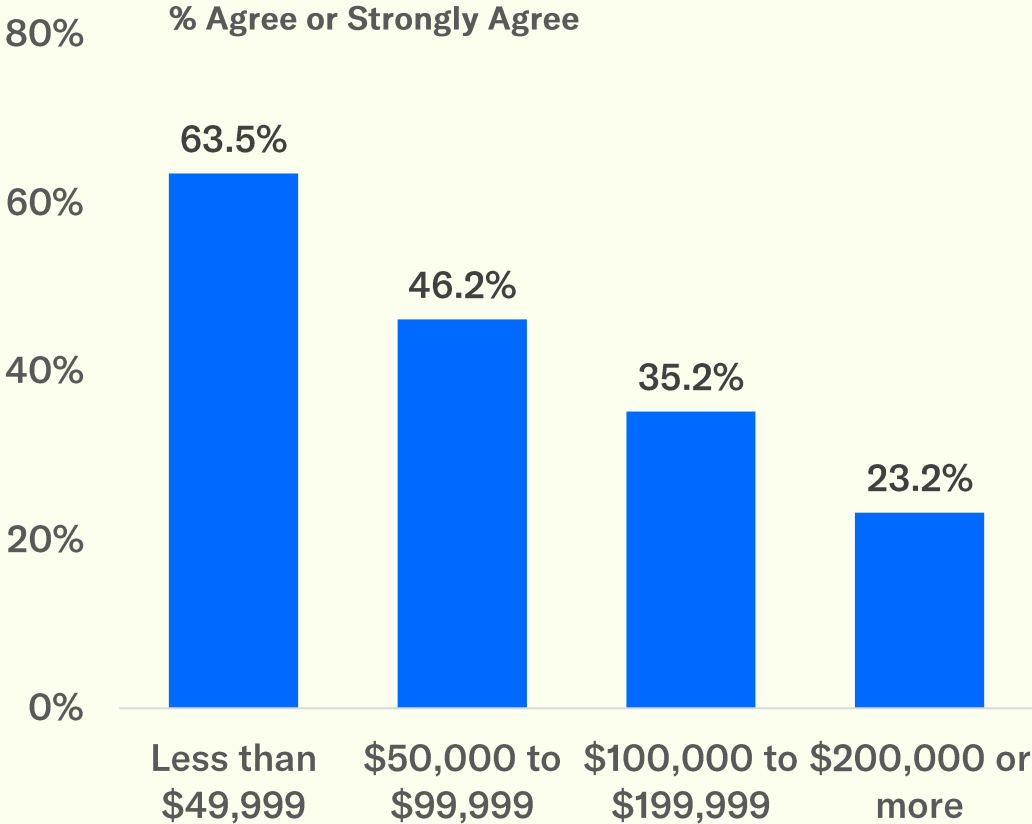
Nearly Half of American Travelers Feel Travel Has Become a Hard to Afford Luxury.

Statement Agreement:

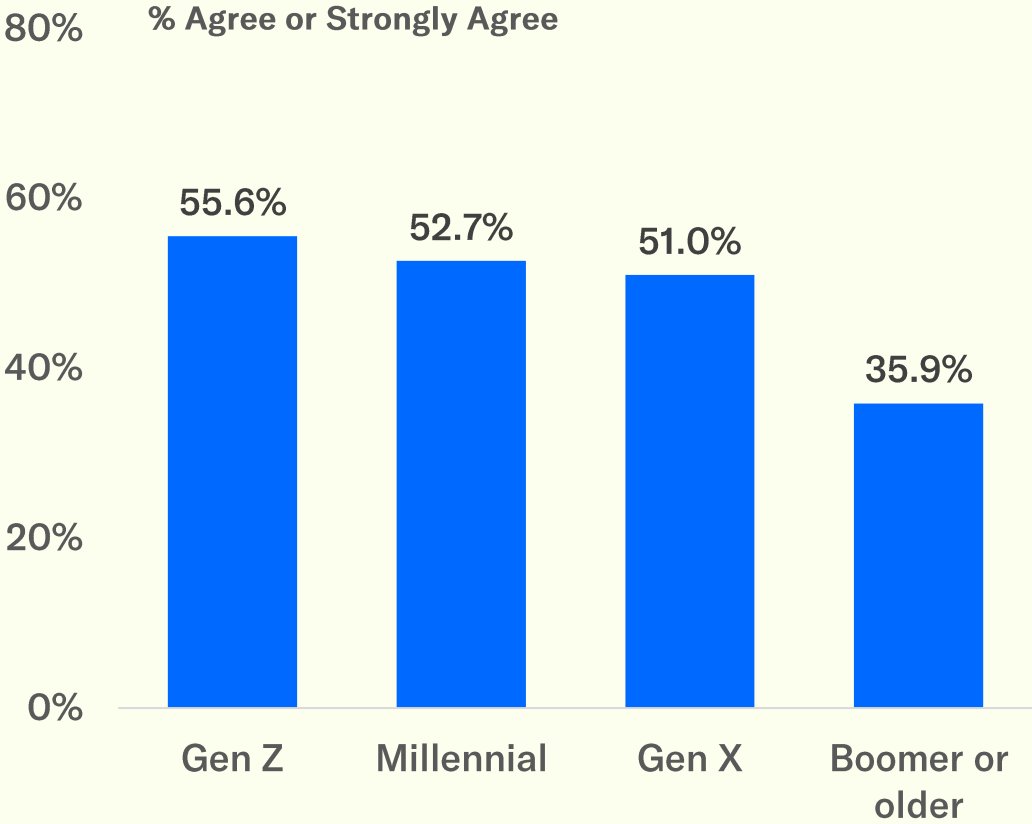
Travel feels like a luxury that is hard for me to really afford right now.



Lower Income Travelers Are Feeling the Financial Pinch Related to Travel



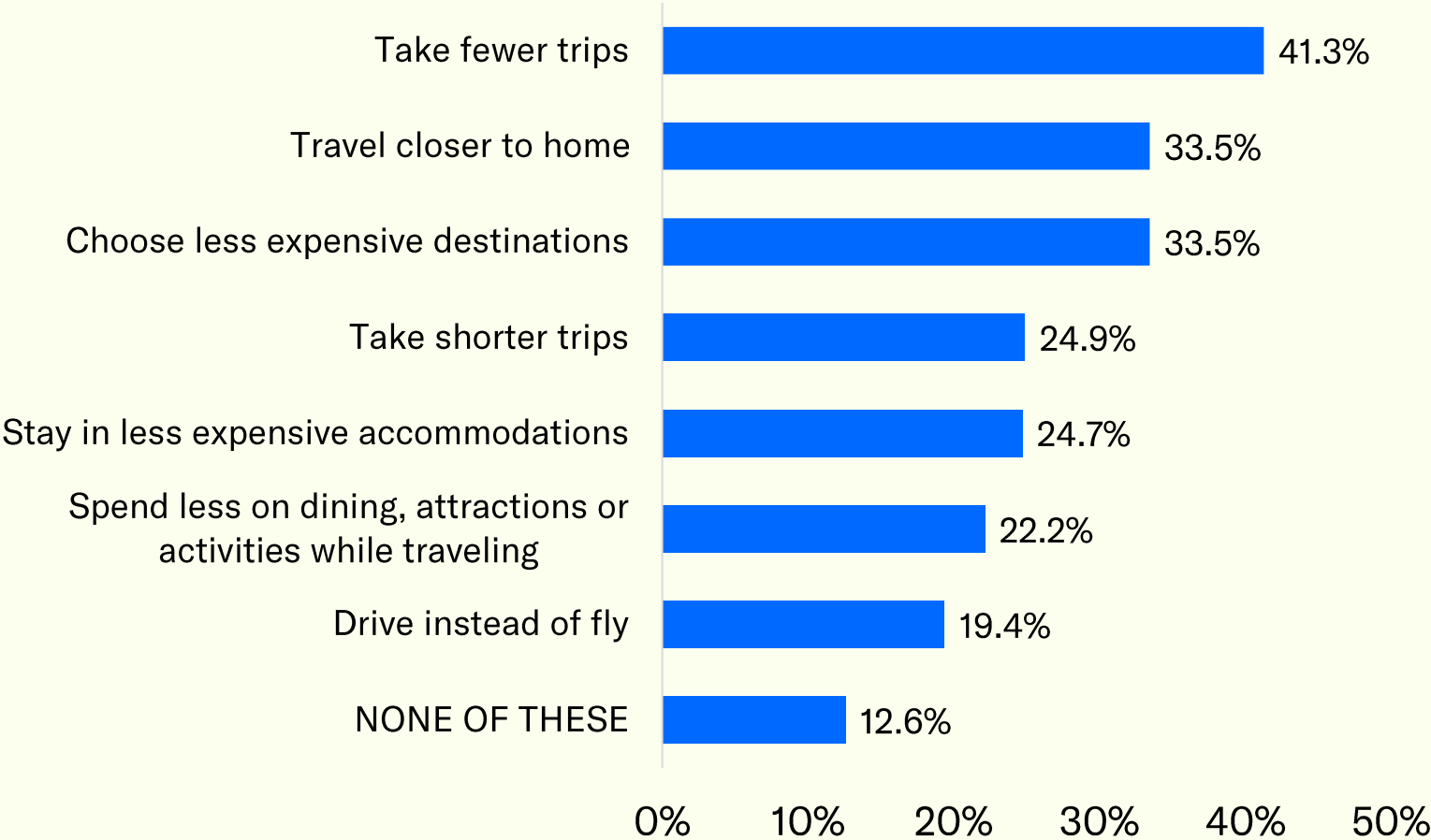
Older Travelers are the Least Likely to Feeling Like Travel is Financially Out of Reach



Cutting Back on Trips Taken Would be the First Recourse in Travel Spending Reduction

Question:

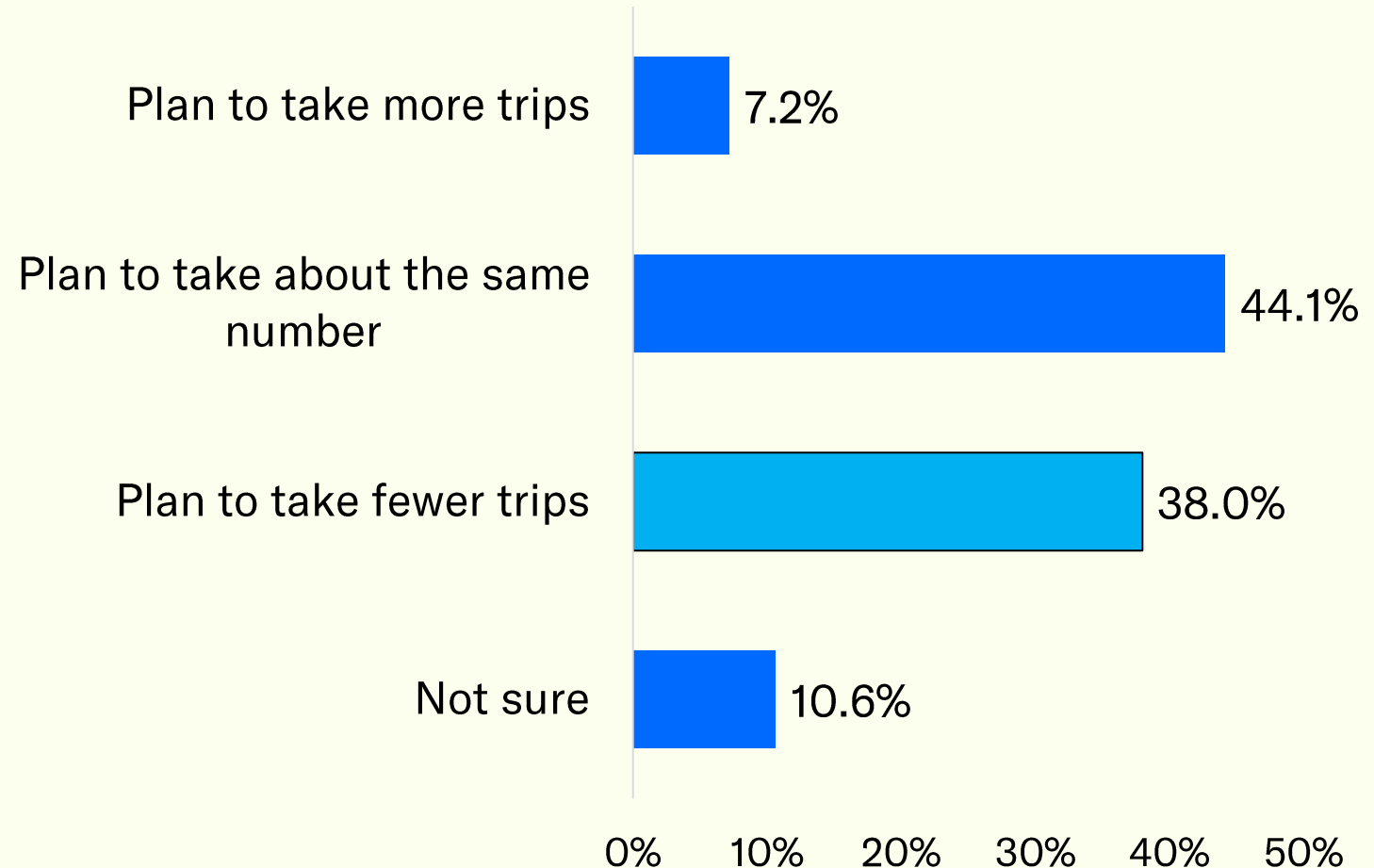
If you needed to reduce your travel spending, what would you do or cut back on first?



More Than 1-in-3 Travelers Say Fuel Costs Will Lead Them to Take Fewer Trips This Summer

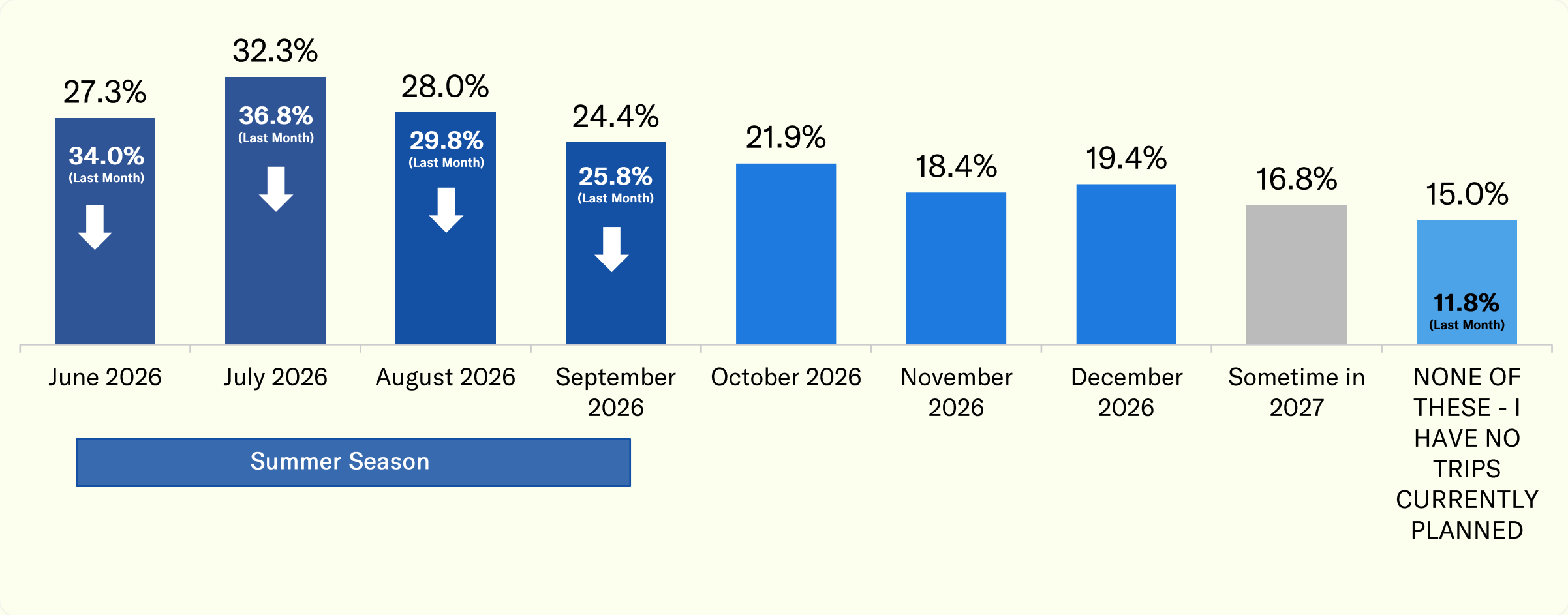
Question:

Compared to your typical summer travel, how has the current cost of fuel affected the number of leisure trips you plan to take in the next 3 months?



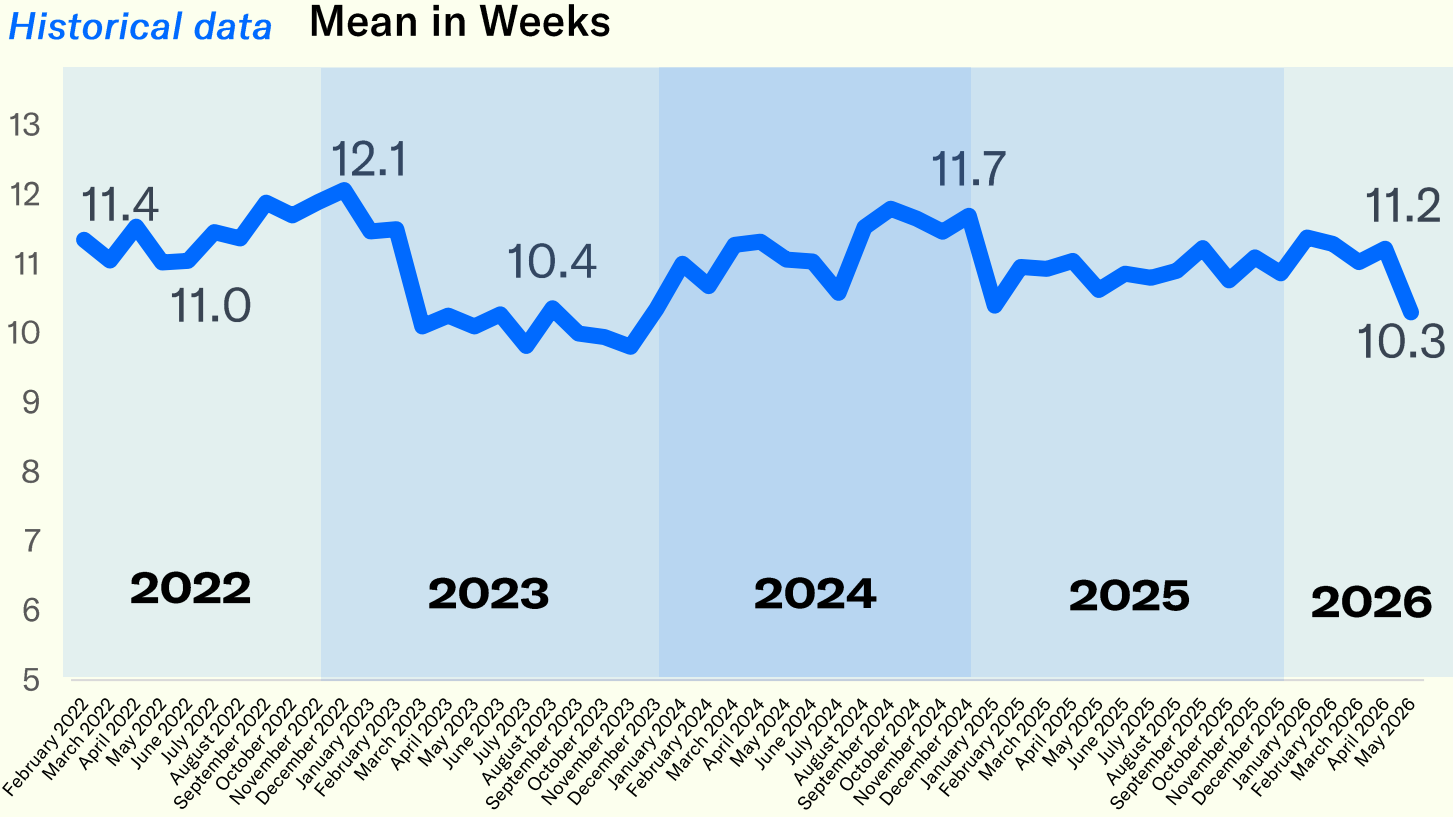
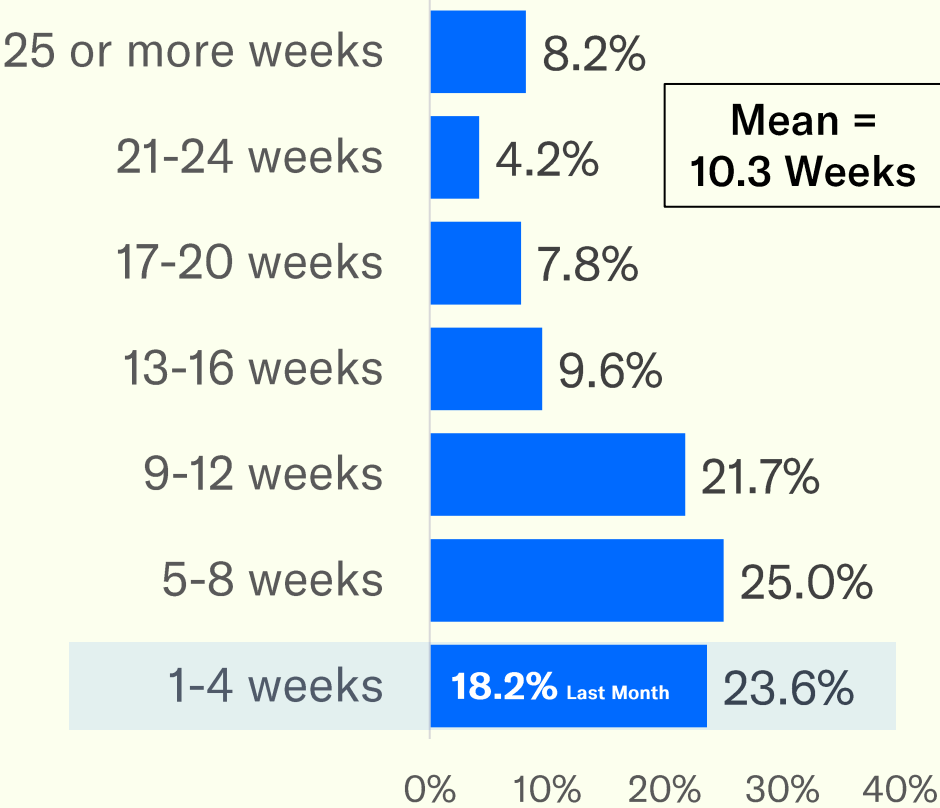
Americans' Summer Travel Plans Have Dipped in the Past Month

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



Planning Window for Domestic Leisure Travel

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



June 2026 Key Takeaways

This is a month of productive tension. Sentiment has softened, budgets have pulled back from record highs, trip expectations have dipped to a one-year low, and the forward booking calendar has eased across the summer window. Fuel costs are creating real friction, and travel excitement is at its lowest point of the year.

And yet, while near term trip expectations have softened, actual trip-taking in the past month is up. Travel ranks fifth — not first — on the list of what Americans would cut from household budgets, and 42 percent say they will cut everyday spending before they cut their summer travel.

The industry's opportunity in this environment is specific. Proximity and drive-market accessibility are genuine competitive advantages. Value transparency is a conversion tool. Safety and welcome remain factors that influence destination selection. And the audiences most financially stretched — Millennials and Gen Z — are the most motivated to find a way to travel regardless.

Introducing

FPAI

The All-in-One Travel Industry Marketing Strategist

Powered by Future Partners Research
Intelligence

Future Partners

8:36 AM



SATS AI Insights Explorer

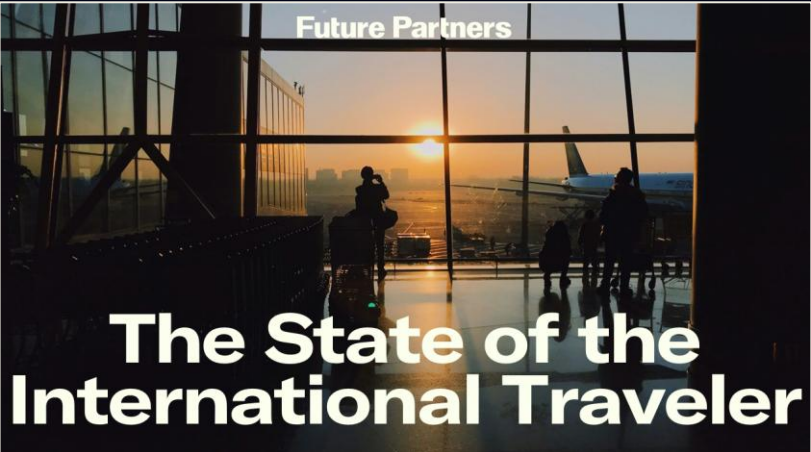
AI-powered insights from the State of the American Traveler study.
Explore real-time traveler sentiment, behaviors, and trends to stay
ahead of the market.

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Future Partners' Data + Insights Meets the Power of AI

Purpose built to give you **Sharper Answers, Smarter Strategy, and Faster Decisions.**



Future Partners 8:58 AM

SATS AI Insights Explorer

All personal insights from The State of the American Traveler study. Explore real-time traveler sentiment, behaviors, and trends to stay ahead of the market.

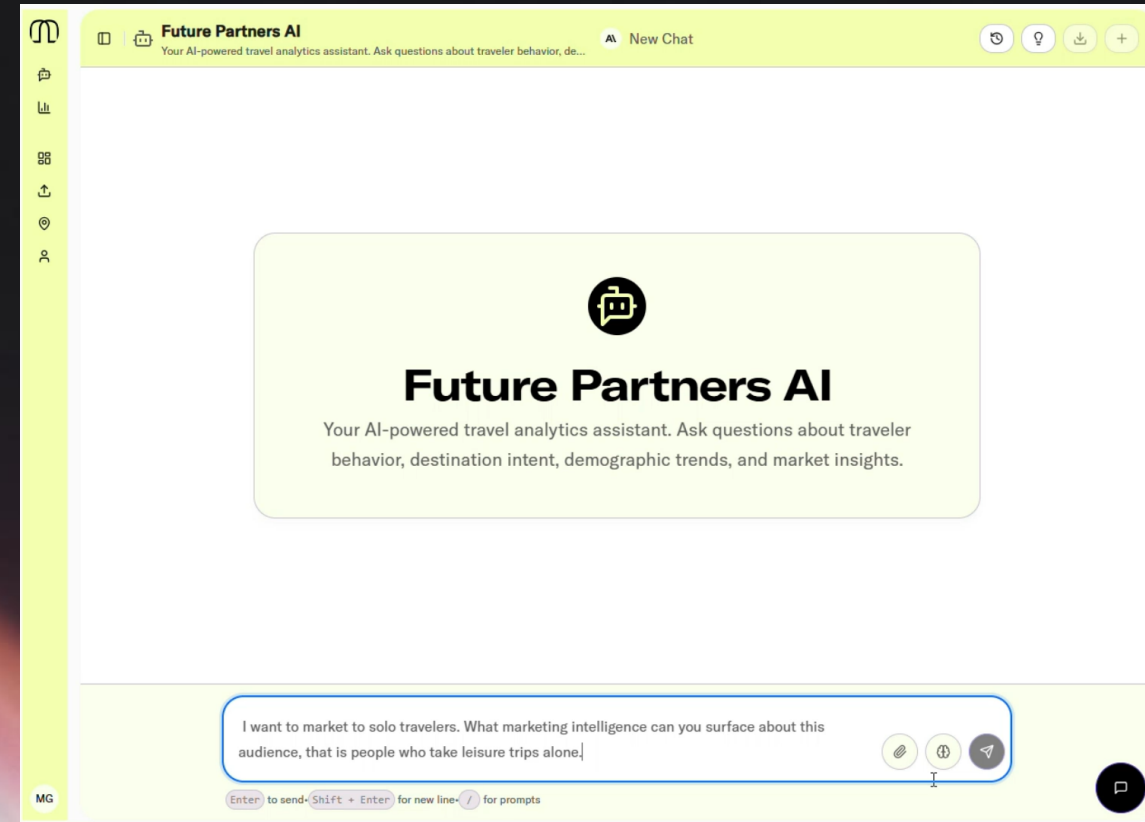
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The All-in-One Travel Industry Marketing Strategist

This block contains a screenshot of the 'SATS AI Insights Explorer' interface. The interface is dark-themed with a central graphic of three vertical bars. Below the graphic, there is a title 'SATS AI Insights Explorer' and a short description: 'All personal insights from The State of the American Traveler study. Explore real-time traveler sentiment, behaviors, and trends to stay ahead of the market.' At the bottom of the screenshot, there is a copyright notice: '© 2025 Future Partners. All Rights Reserved. Privacy Policy Terms of Use'. To the right of the screenshot, the text 'The All-in-One Travel Industry Marketing Strategist' is displayed in a serif font.

FPAI

This conversational tool gives you a continuous read on American traveler sentiment and its implications, so your brand and media investments are always grounded in what travelers are actually thinking and doing now - all at the push of a button.



Now in Beta Testing – Get on the Waitlist

