

# Future Partners

*The State of the  
American Traveler*  
*July 2026*

Opportunity powered by *Insight*

**Future Partners**

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

**Future Partners**

*Bringing the future of travel  
within reach*

**Future Partners**

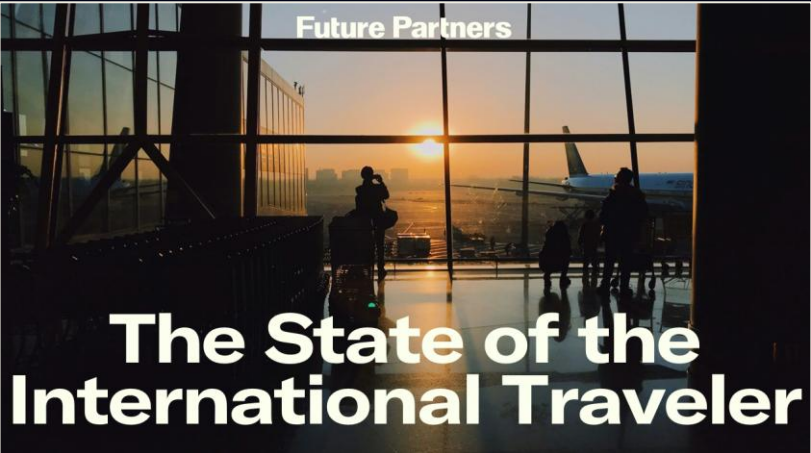
An aerial night view of a city with lights and a blue overlay. The text is overlaid on the image.

**Presentation deck and recording will be available on our website:**

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

# Future Partners' Data + Insights Meets the Power of AI

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



Future Partners 8:30 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 Travel Industry's Insights Agent

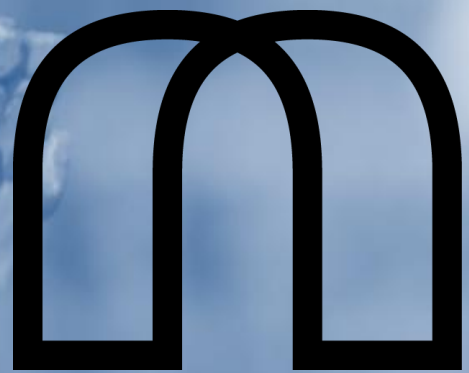
This block contains a screenshot of the 'SATS AI Insights Explorer' interface. The interface is dark-themed with a central graphic of three vertical bars. Below the graphic, there is a title 'SATS AI Insights Explorer' and a brief description: 'All personal insights from the State of the American Traveler 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: '© 2024 Future Partners. All rights reserved. Privacy Policy Terms of Use'. To the right of the screenshot, the text 'The Travel Industry's Insights Agent' is displayed in a serif font.

# Website Relevancy Co-op

Understanding the Role of  
Travel Websites in the Age of AI

**Future Partners**





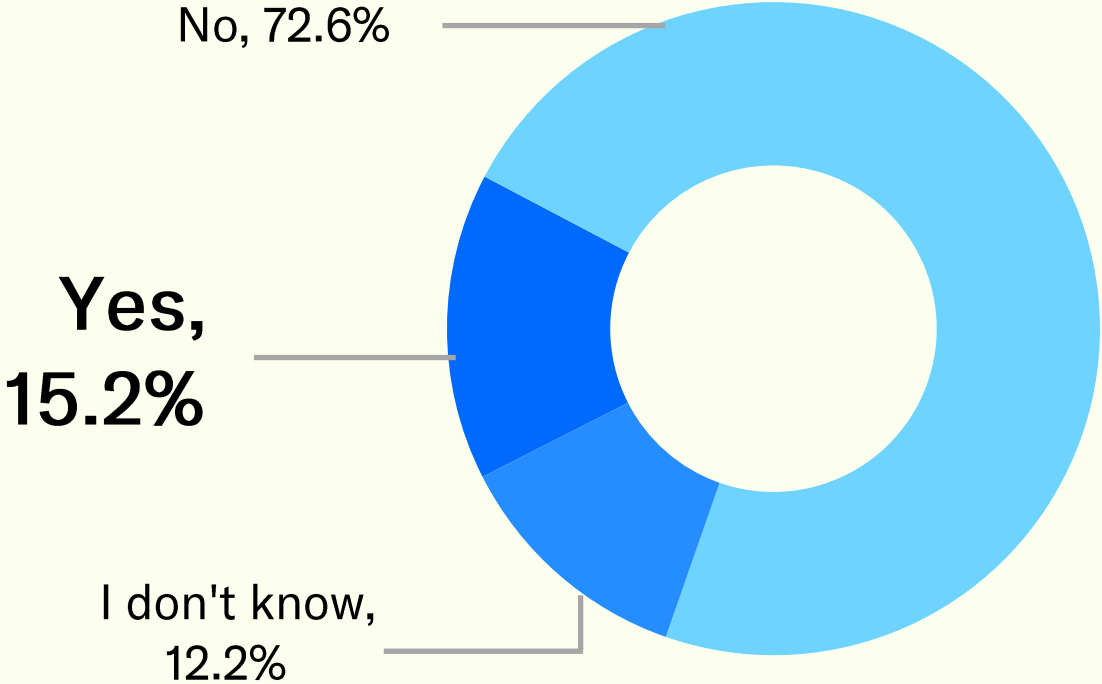
# **2026 Visitor Guide Readership & Conversion Research**



# Business Travelers: Business/Employer Has Implemented New Travel-Related Cost Control Measures (Past 3 Months)

**Question:**

In the PAST THREE (3) MONTHS, has the business/organization you work for implemented any new travel-related cost control measures (e.g., reduced business travel, limiting attendance at meetings, new expense report rules or guidance, etc.)?



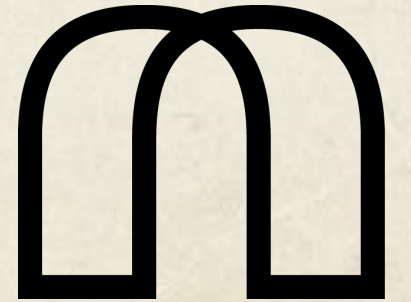
# Methodology

- 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: [June 15 – 26](#)
- 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

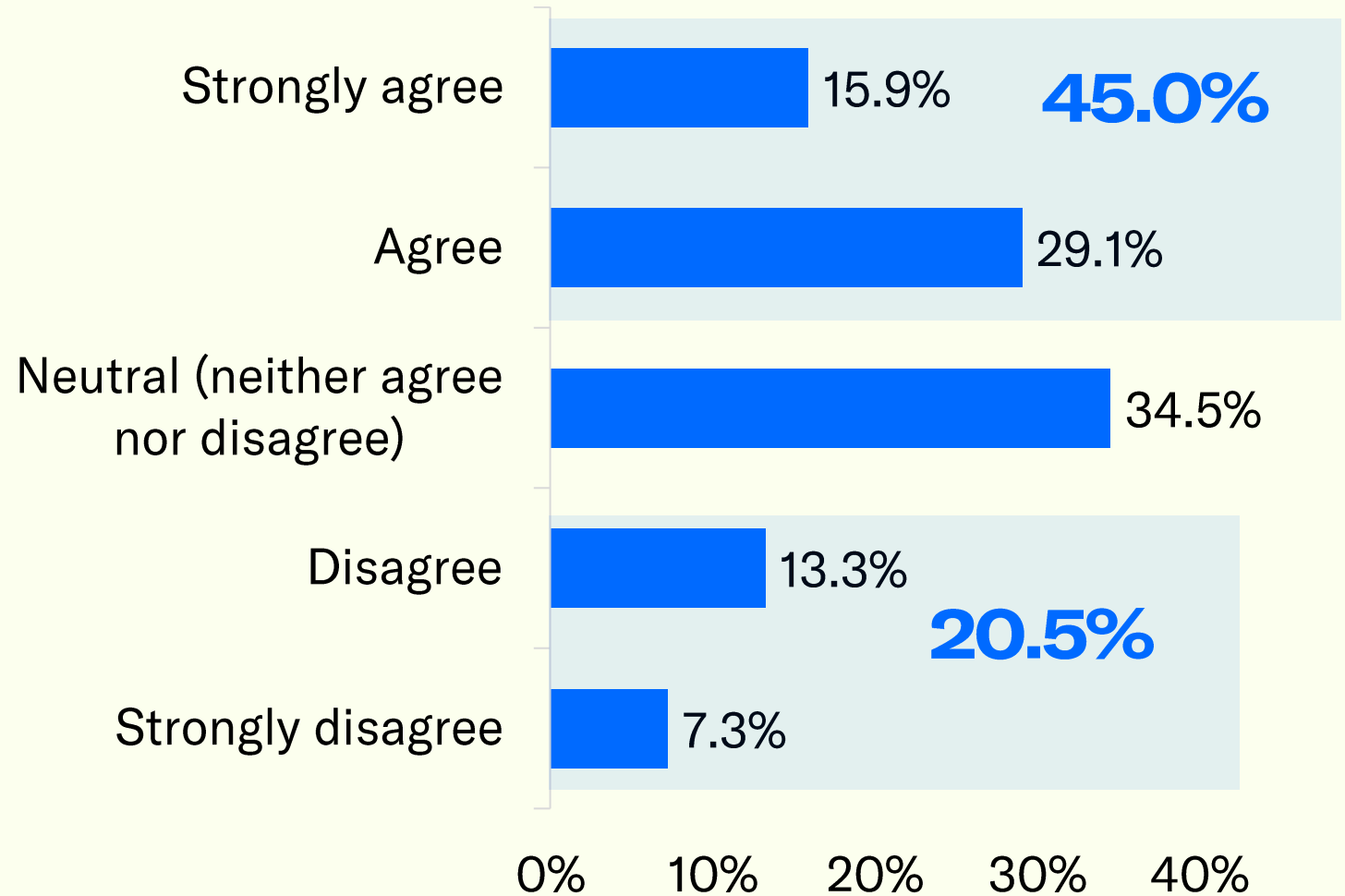


# How are Americans Feeling About the Economy?



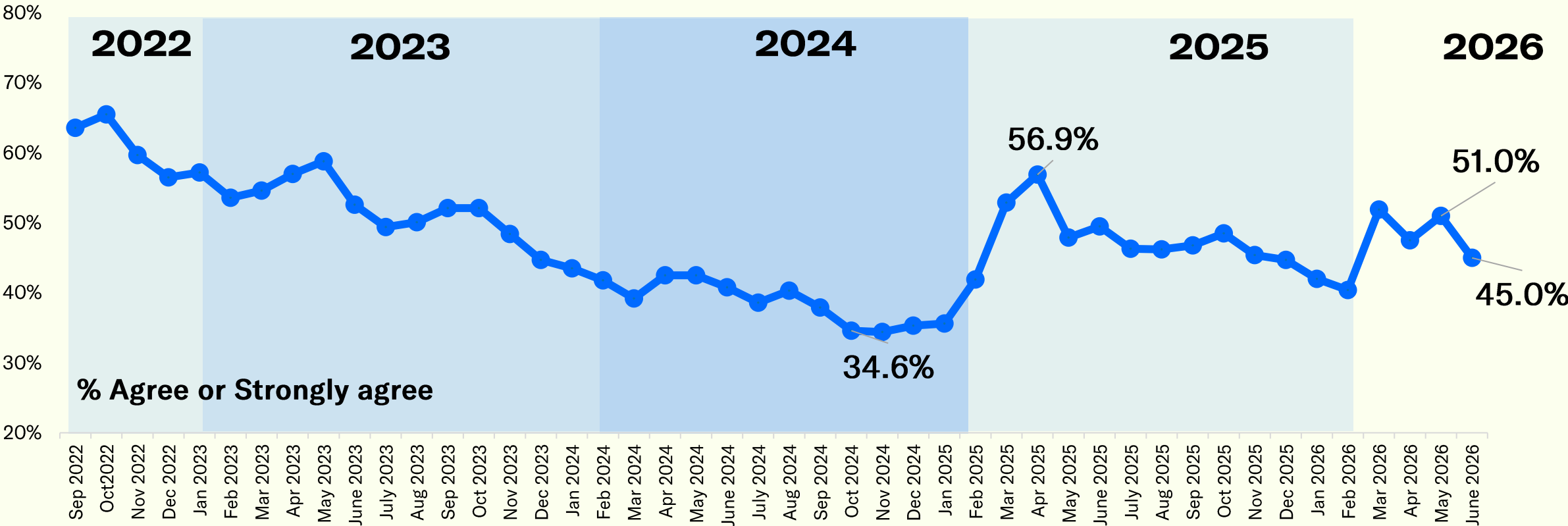
# 45% of American Travelers Anticipate a Recession in the Next 6 Months

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

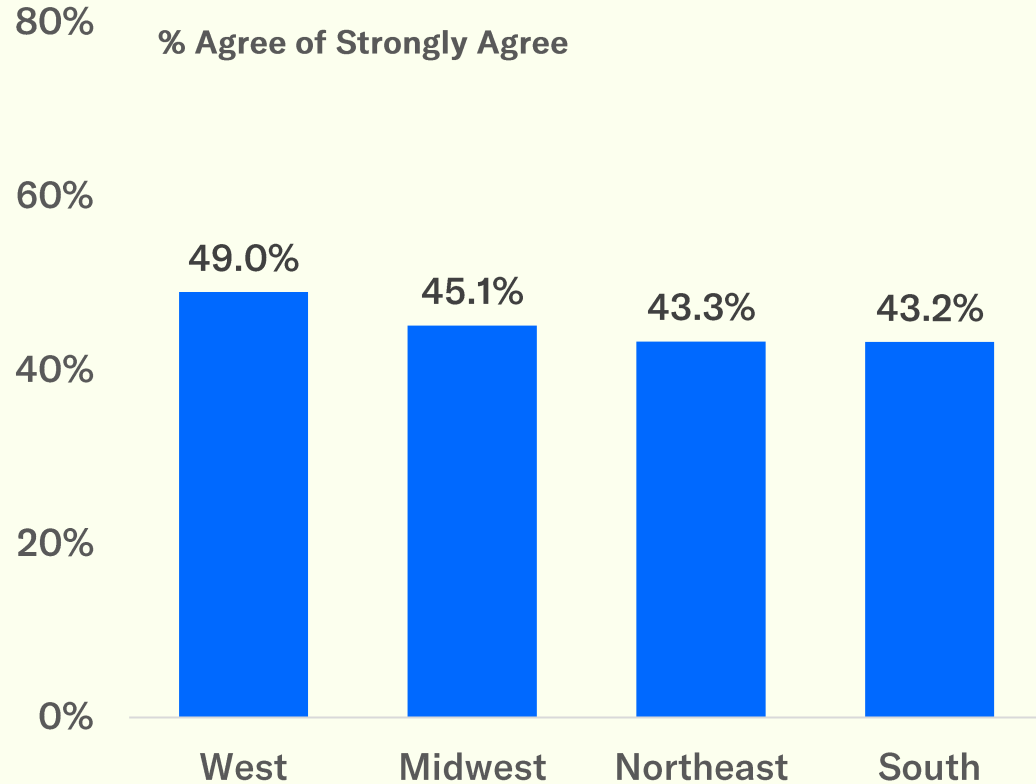


# American Expectations for a Recession Receded in the Last Month

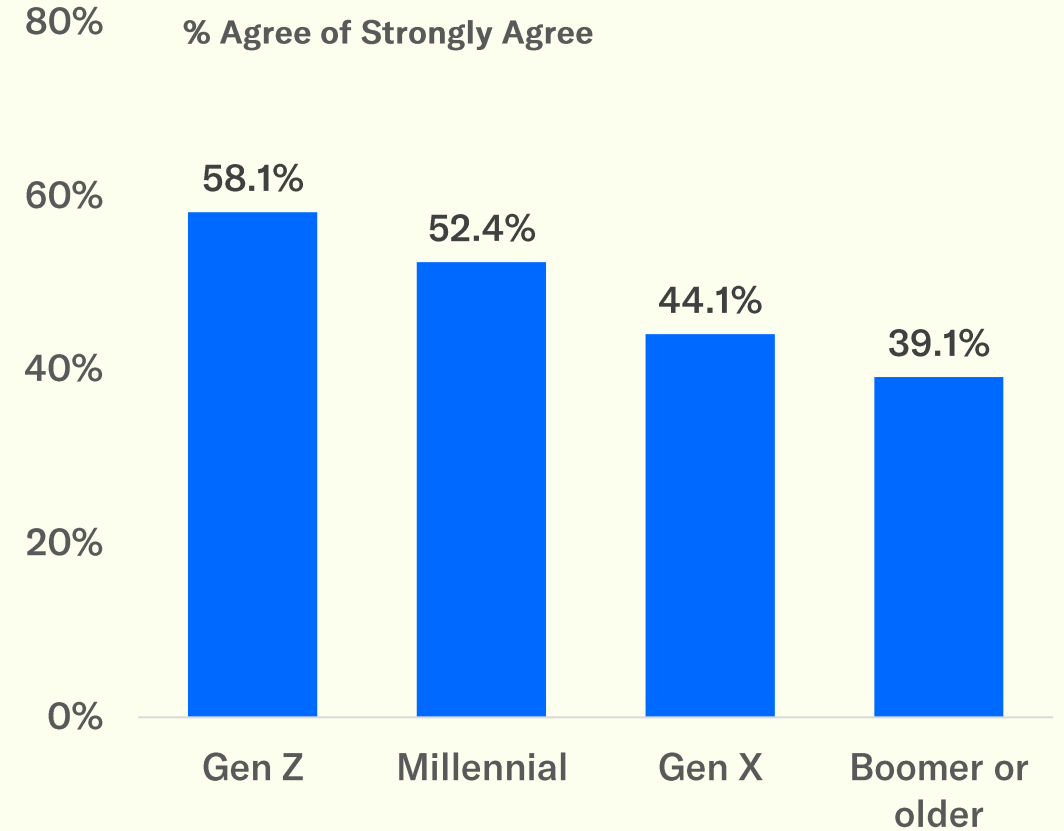
**Statement Agreement:** I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



# Western Travelers Are More Likely to See a Recession on the Horizon



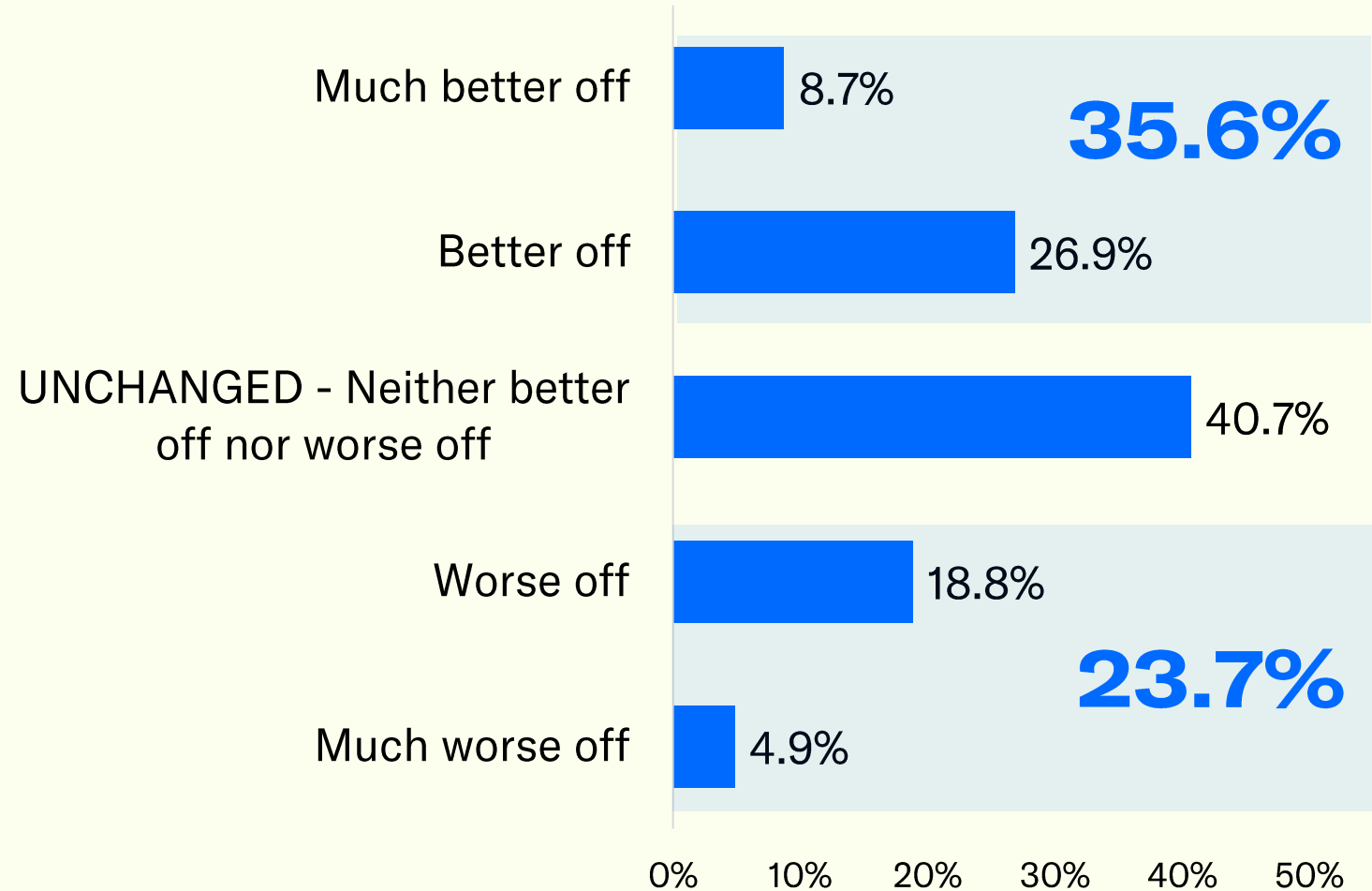
# Younger Travelers are Far More Bearish About a Recession Hitting Soon



# More than 35% of American Travelers Feel Better Off Financially Now

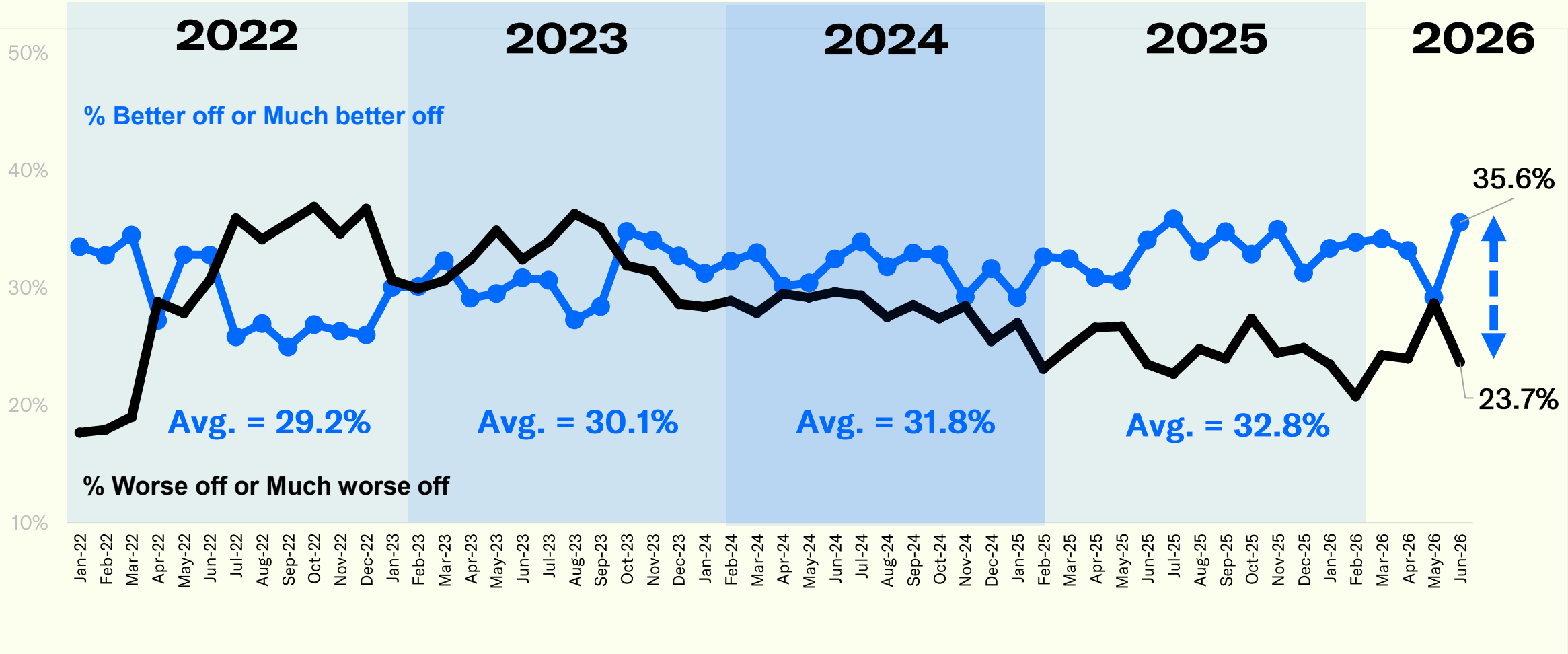
## Question:

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



# American Travelers' Financial Sentiment Rebounds in the Last Month

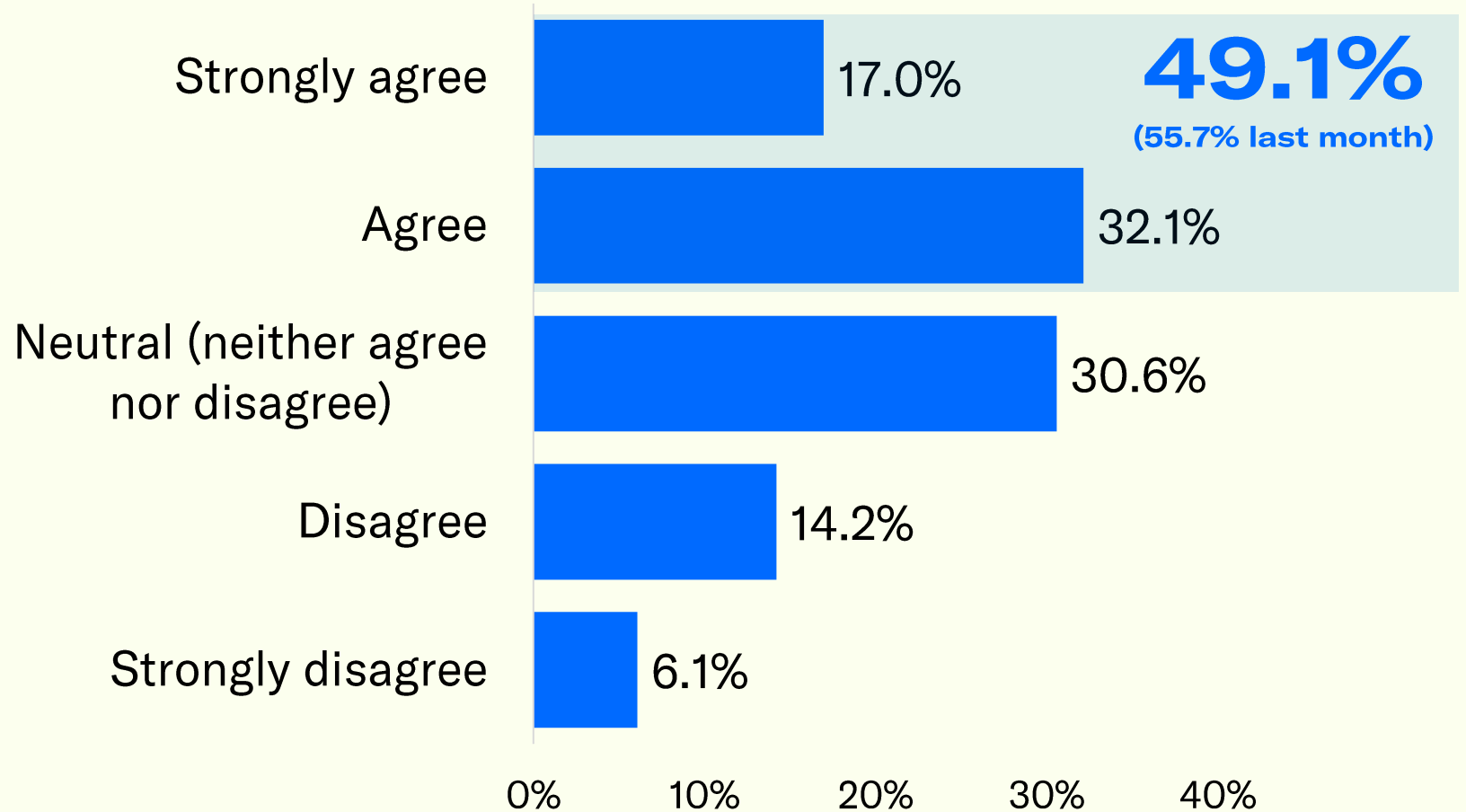
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?



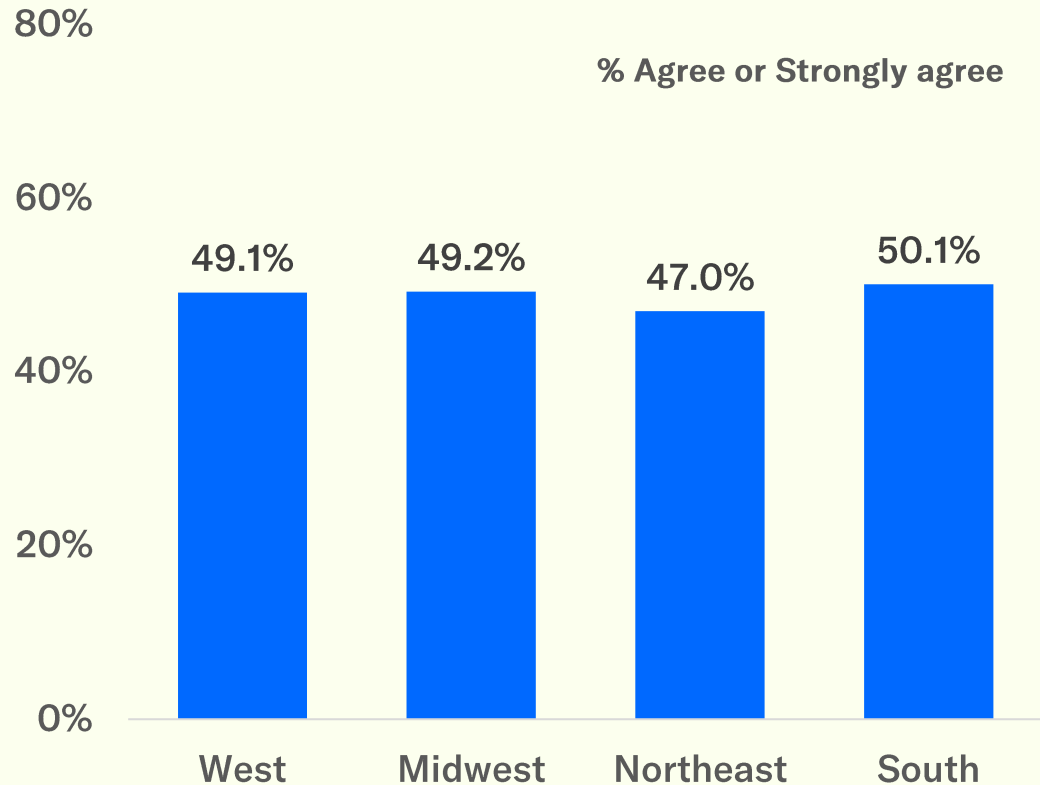
# While Half of Travelers Continue to be Careful with their Money due to Economic Fears, this is Easing

## Question:

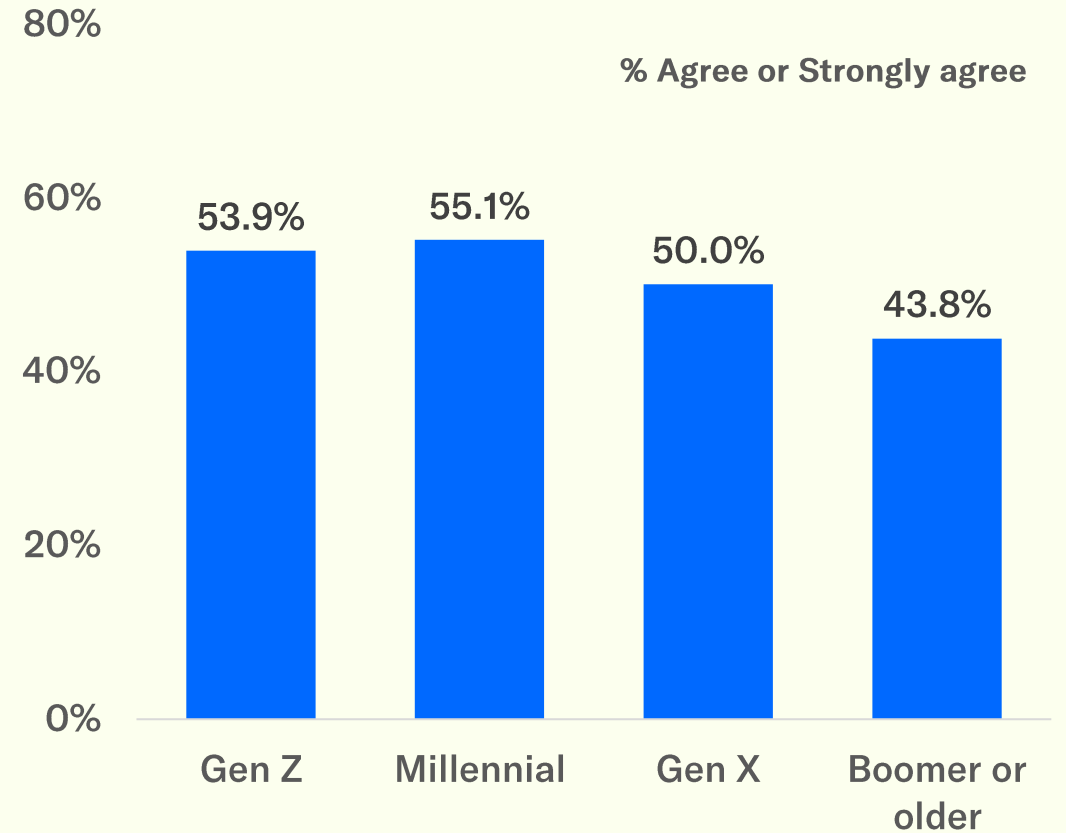
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



## Wallet-Watching is Fairly Even Across Regions



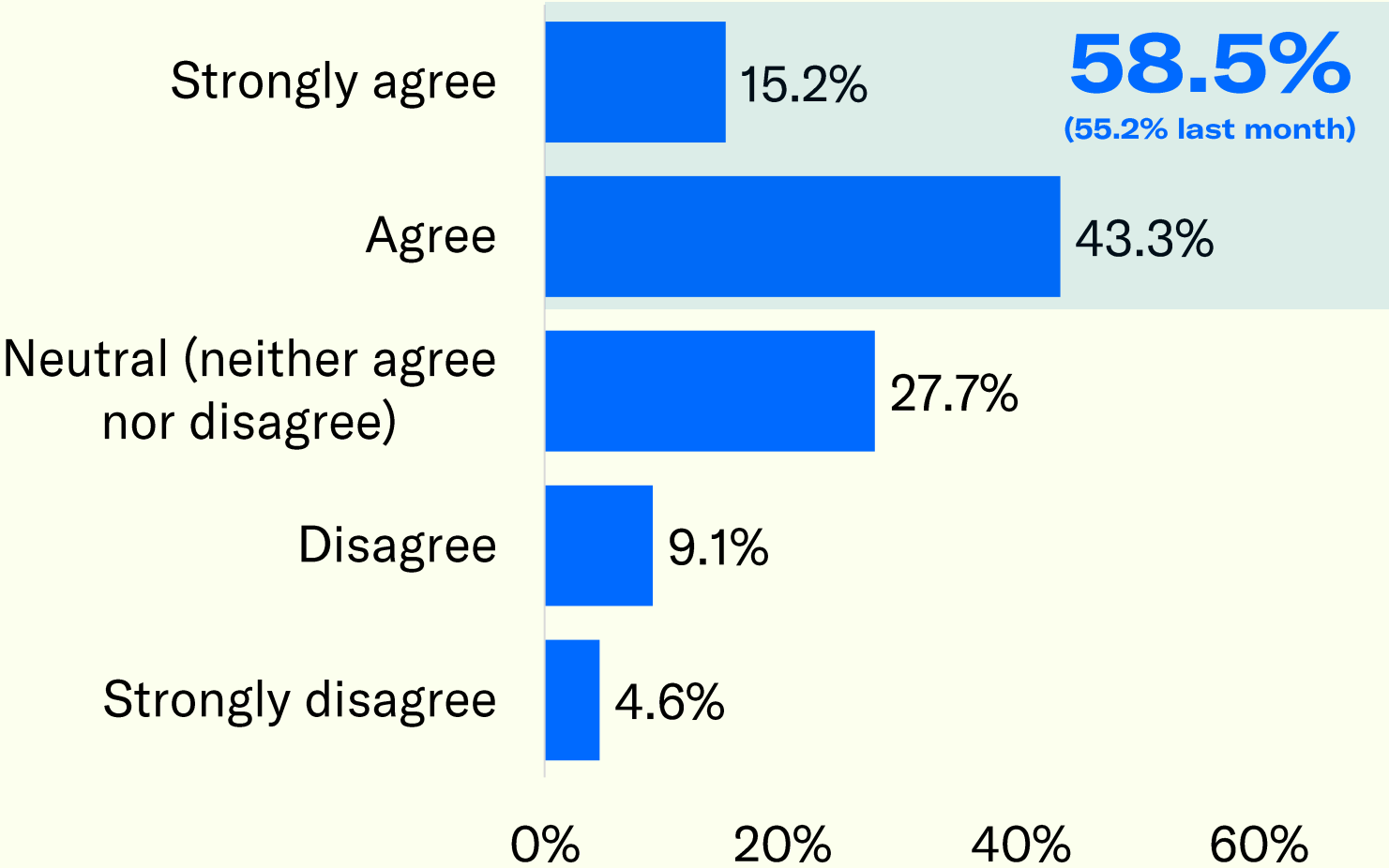
## Younger Travelers are Most Likely to Say They're Being Careful With Their Money



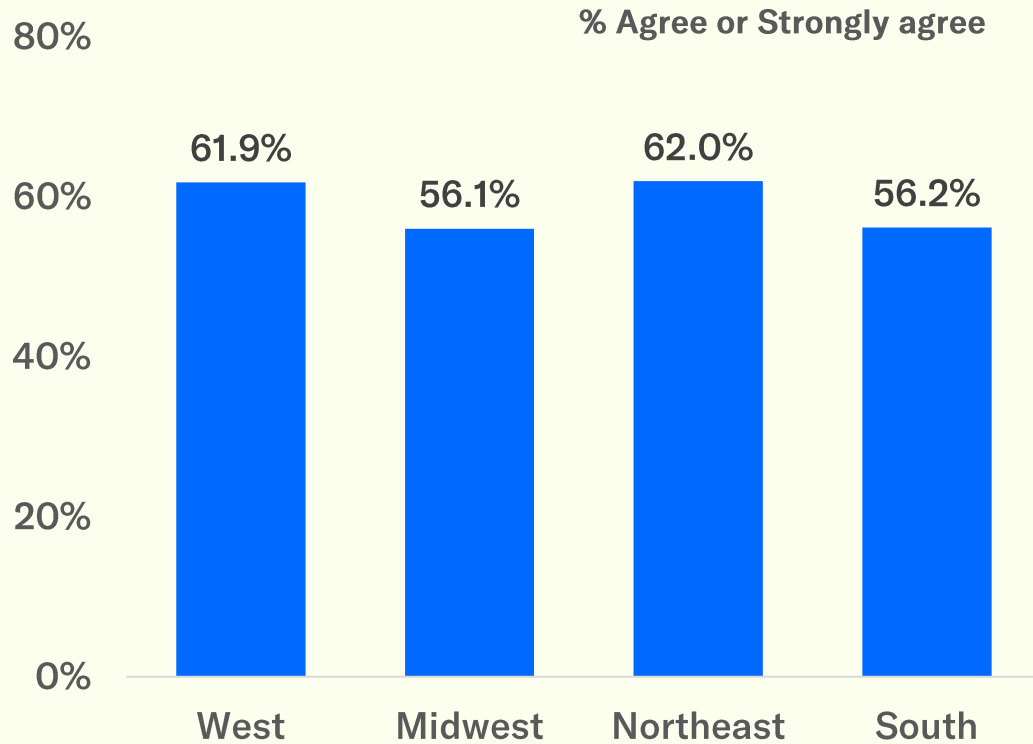
# An Increasing Number of Americans Agree that Travel is a Worthwhile Investment

## Question:

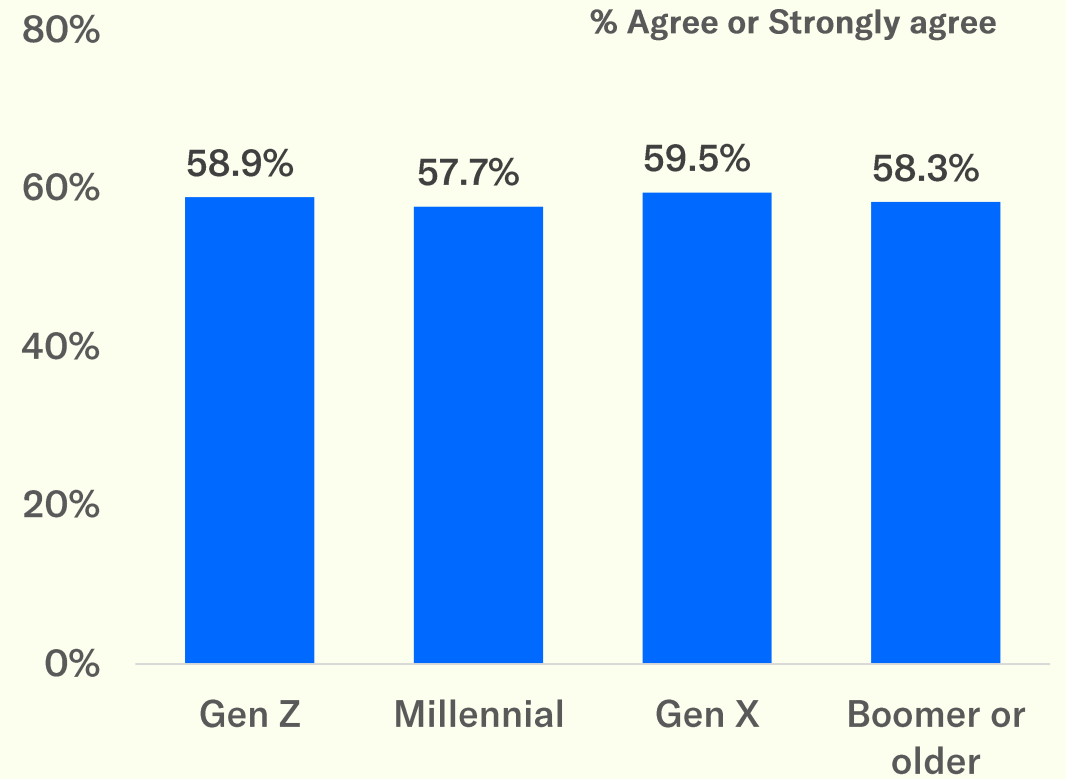
Even in an economic recession, I'd consider travel to be a worthwhile investment.



# Travelers in the West and Northeast Most Likely to See Travel as Important



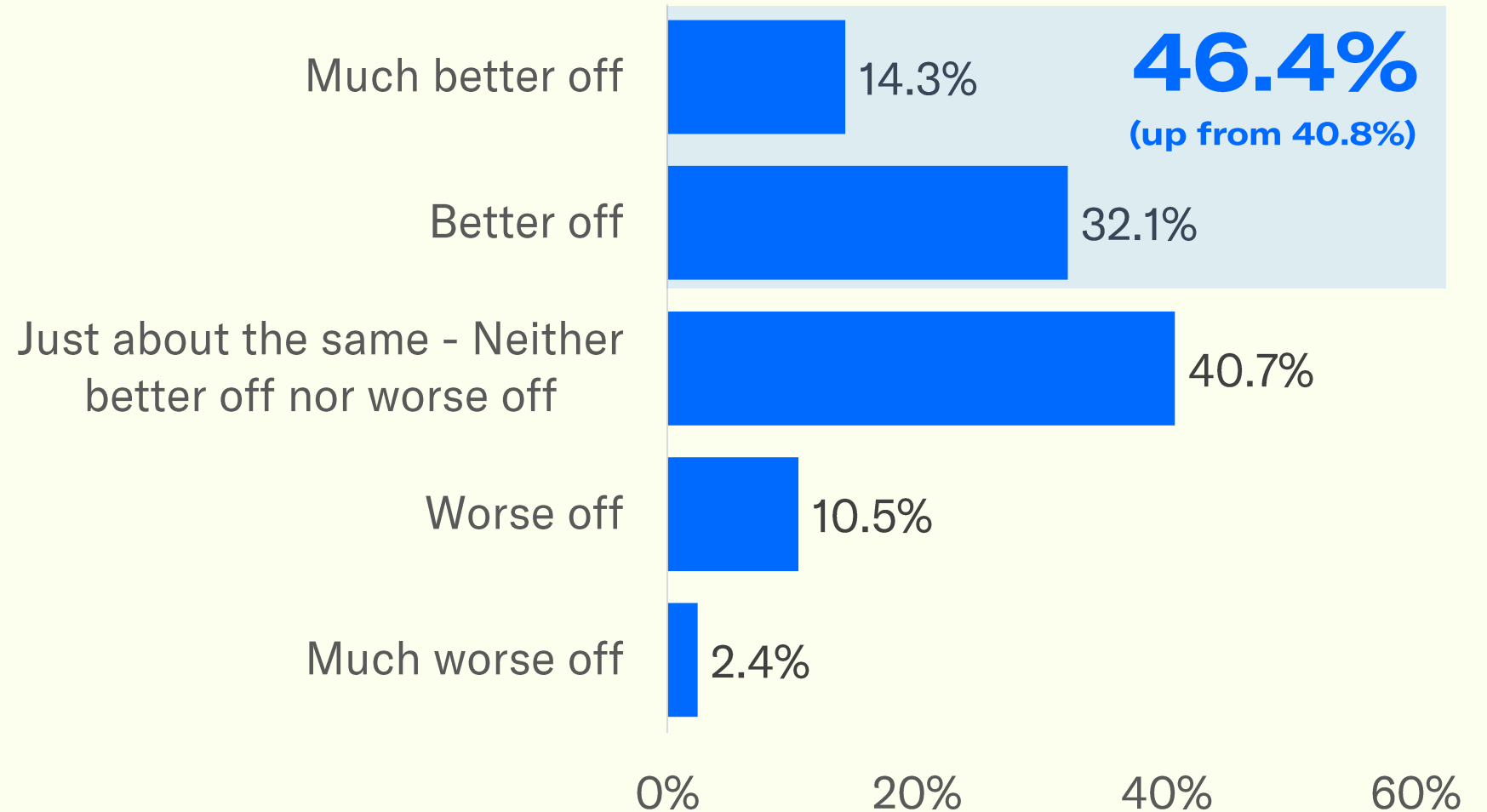
# The Generations Value Travel Equally in Challenging Economic Situations



# Over 46% of American Travelers See their Financial Situation Improving

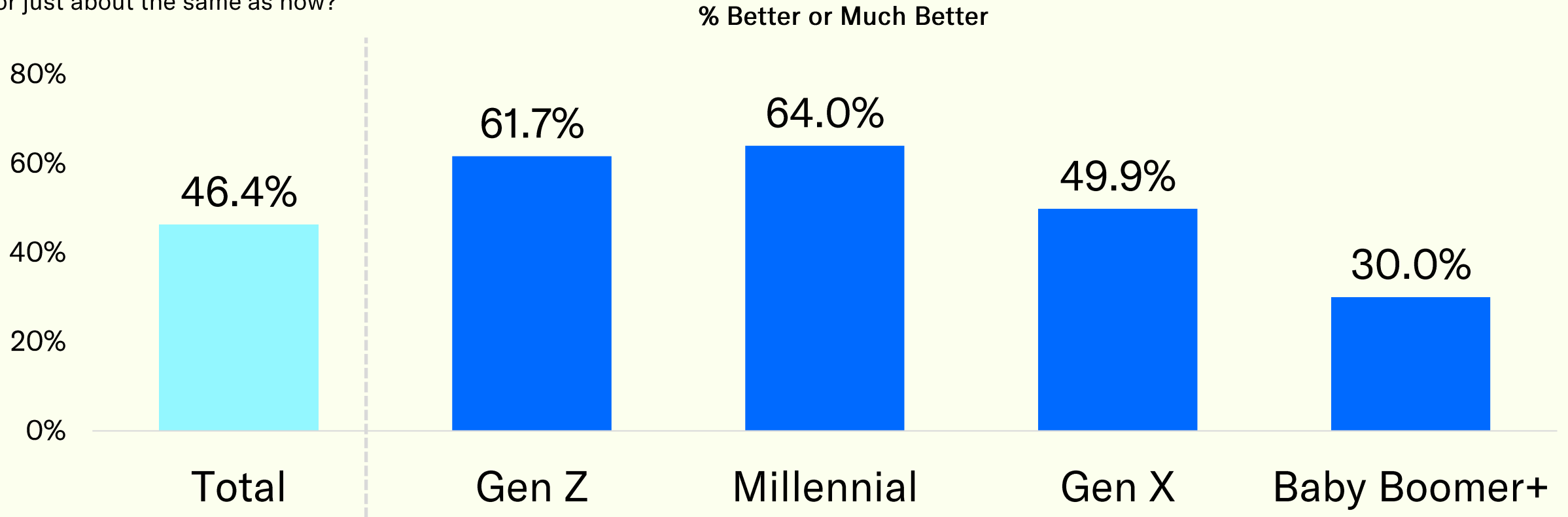
## Question:

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?



# Despite being more Convinced about Recession, Younger Generations are Still Optimistic about their Financial Future

**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?



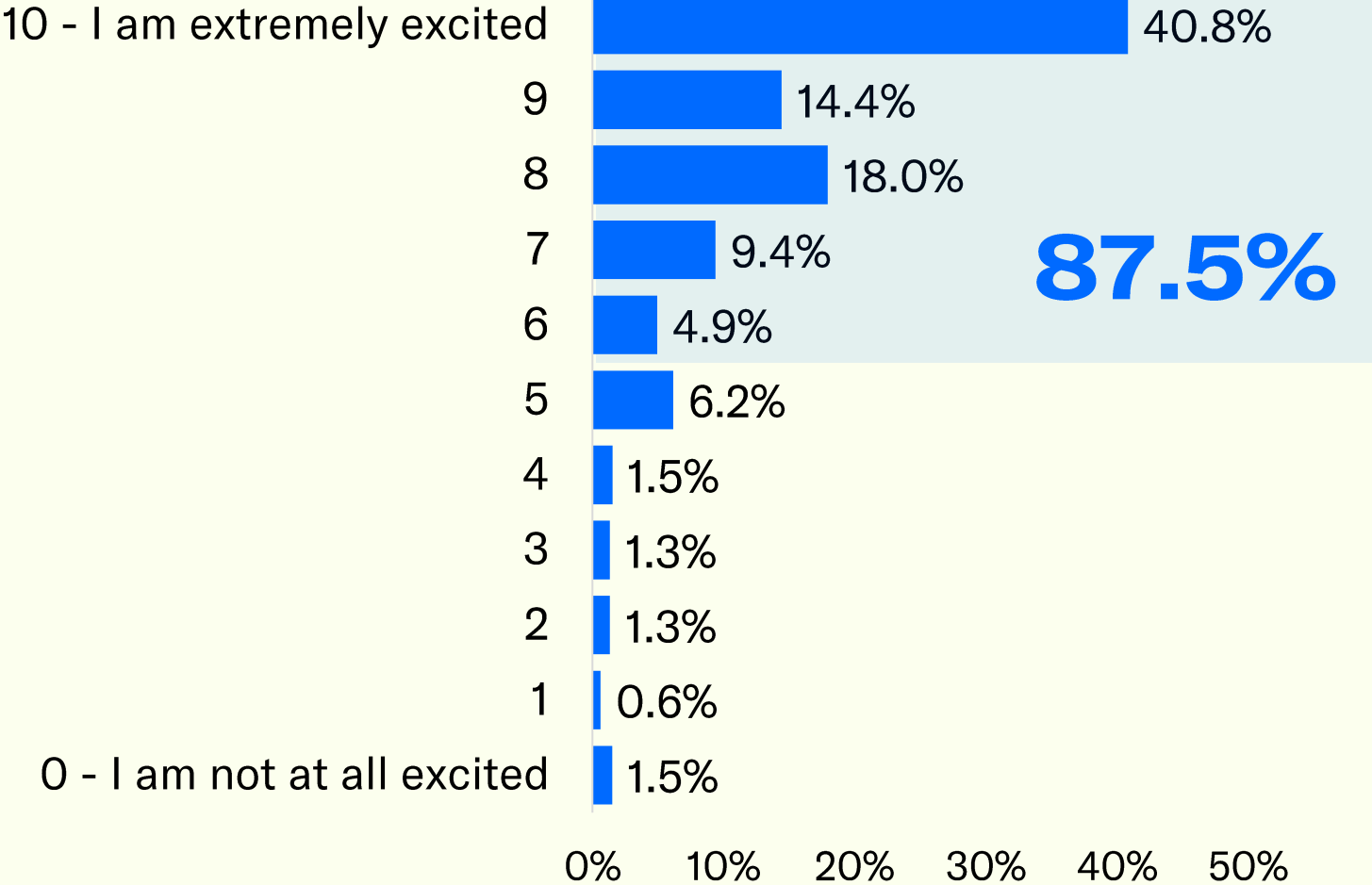


# Americans' Current Travel Sentiment

# Nearly 88% Exhibit Strong Excitement for Leisure Travel

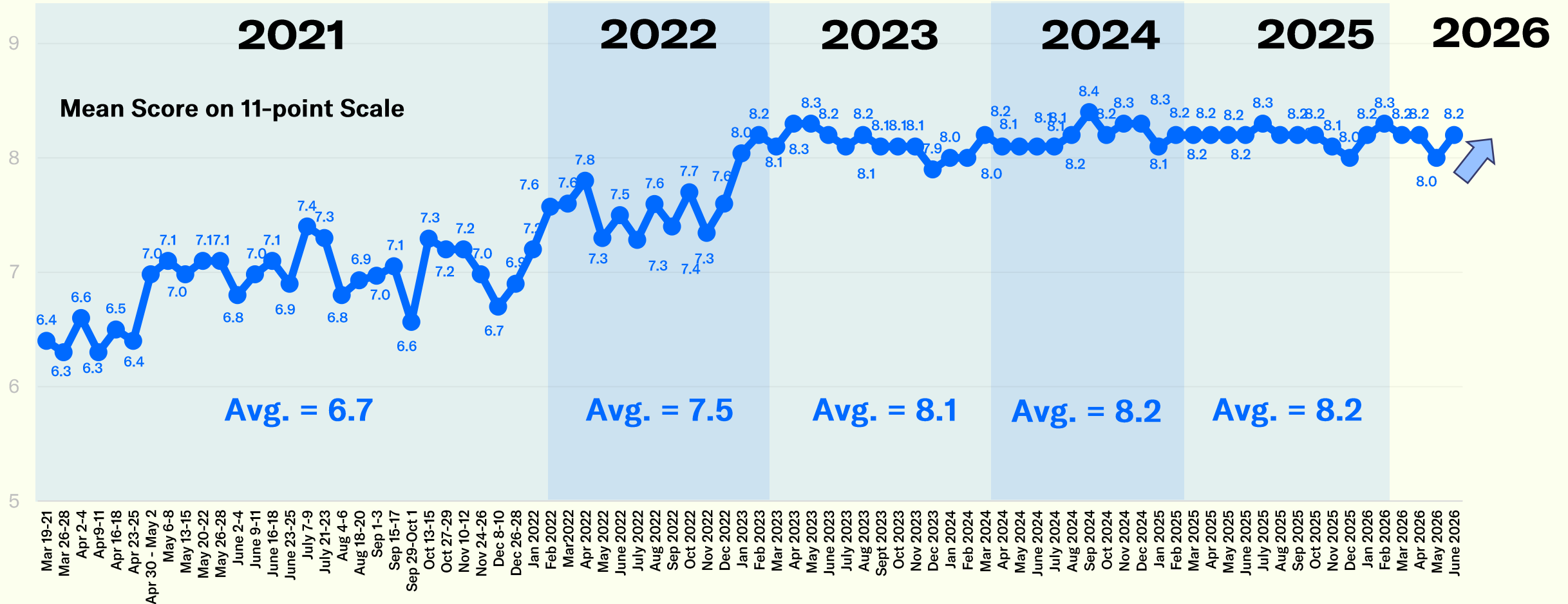
**Question:**

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



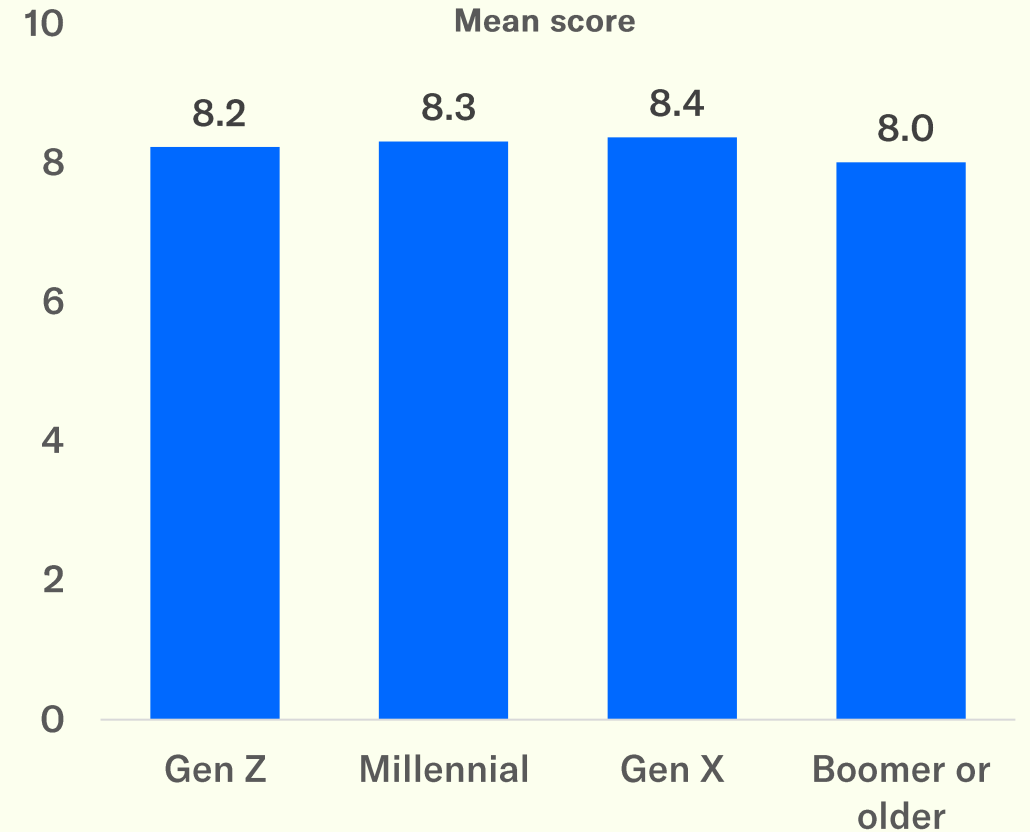
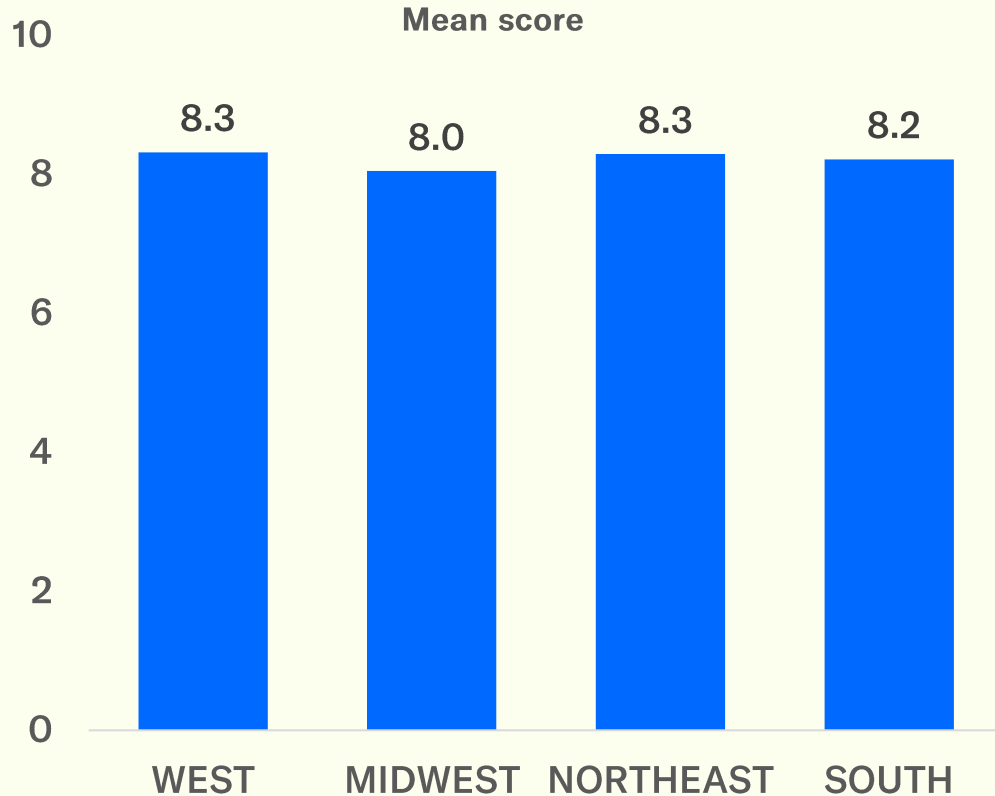
# Excitement for Leisure Travel Recovered This Month—Back to 8.2

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



## Excitement For Travel Is Lowest in The Midwest, Highest in West and Northeast

## Generation X Shows the Highest Levels of Excitement for Travel

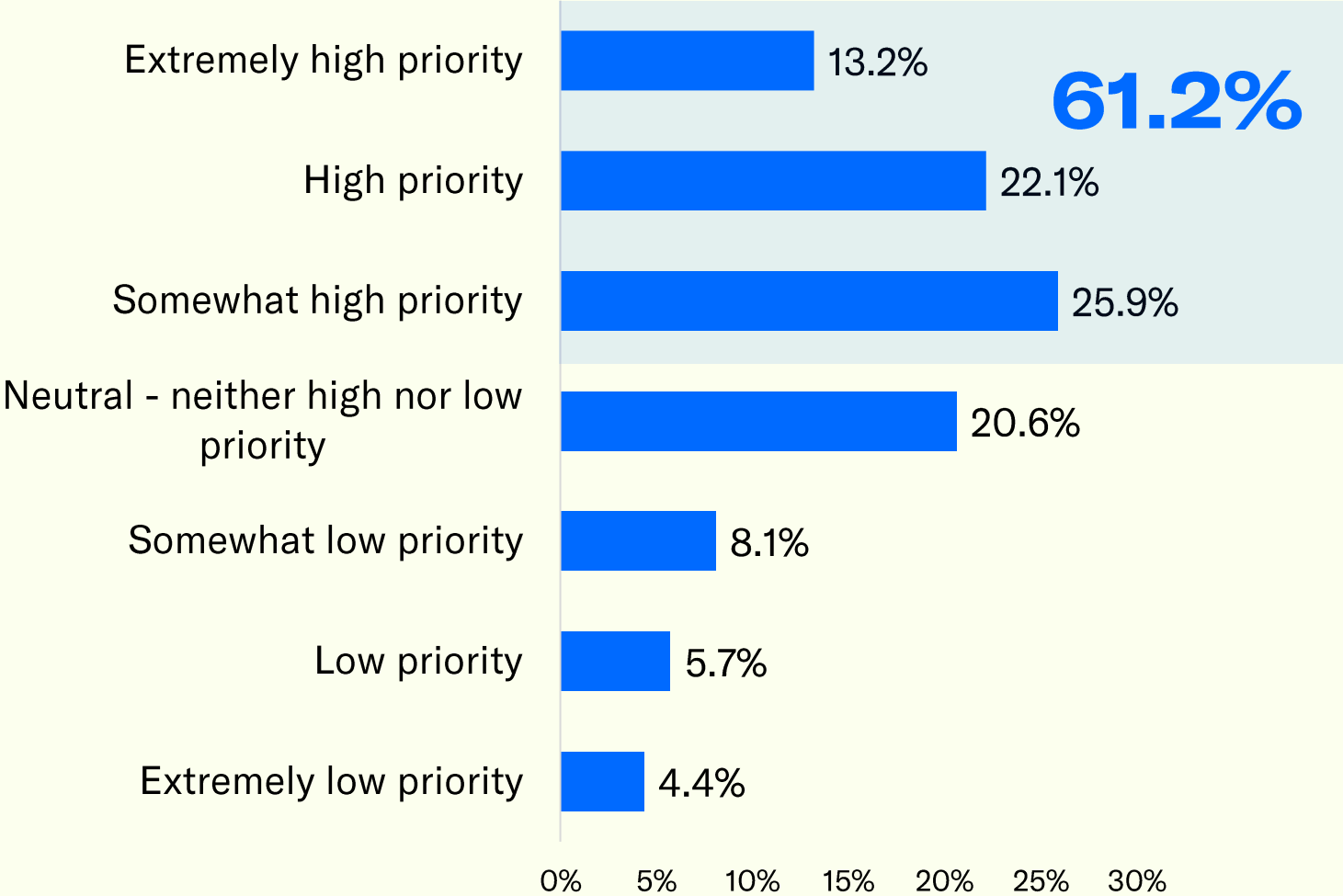


# Travel is Still High in Consumer Spending Priorities

**Question:**

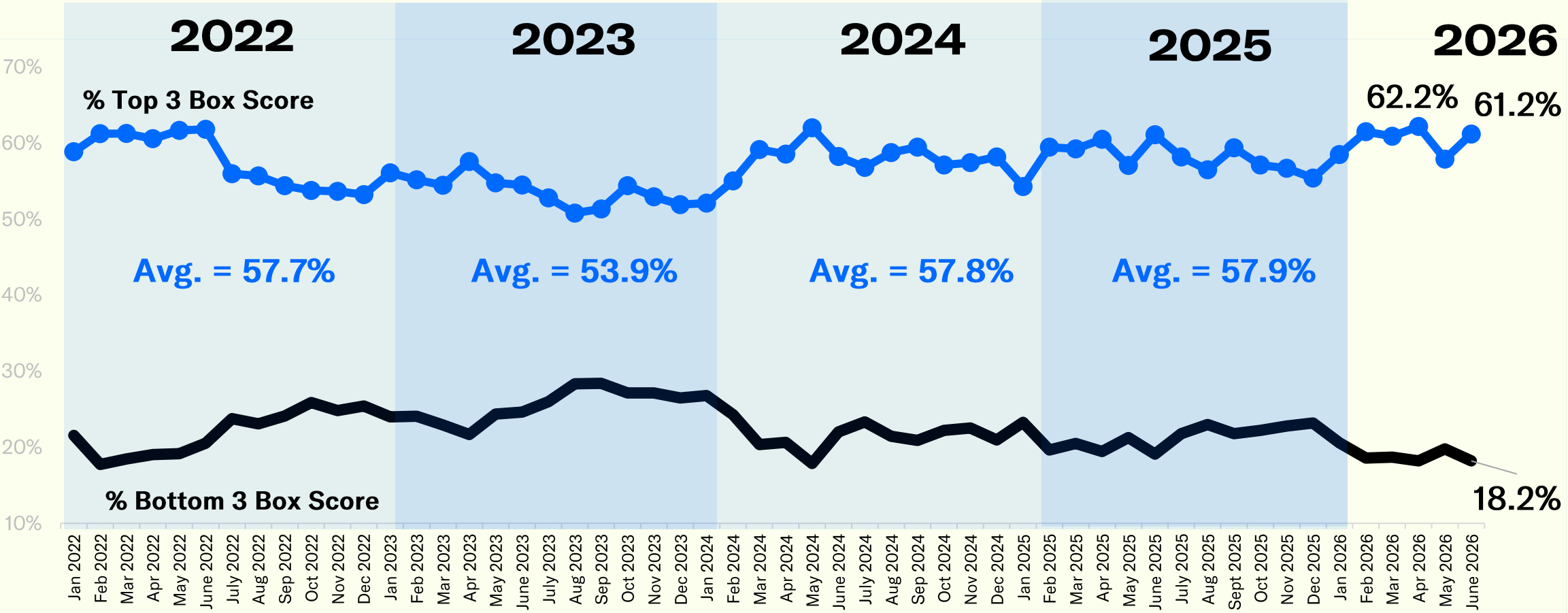
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) \_\_\_\_\_.



# Travel Spending Prioritization Gains Back Last Month's Loss—Still Above 2025 Levels

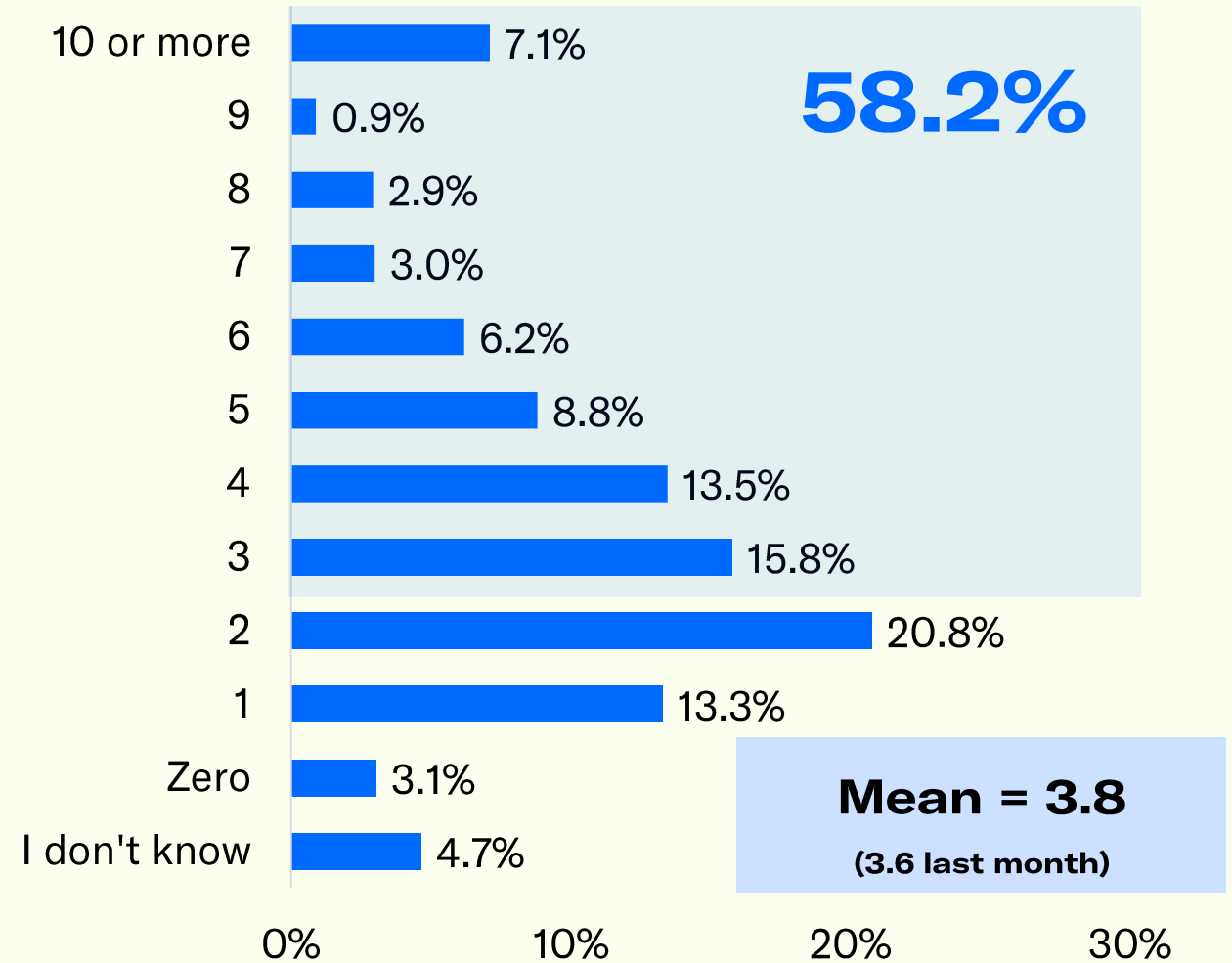
**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



# The Average American is Planning 3.8 Leisure Trips in the Next Year

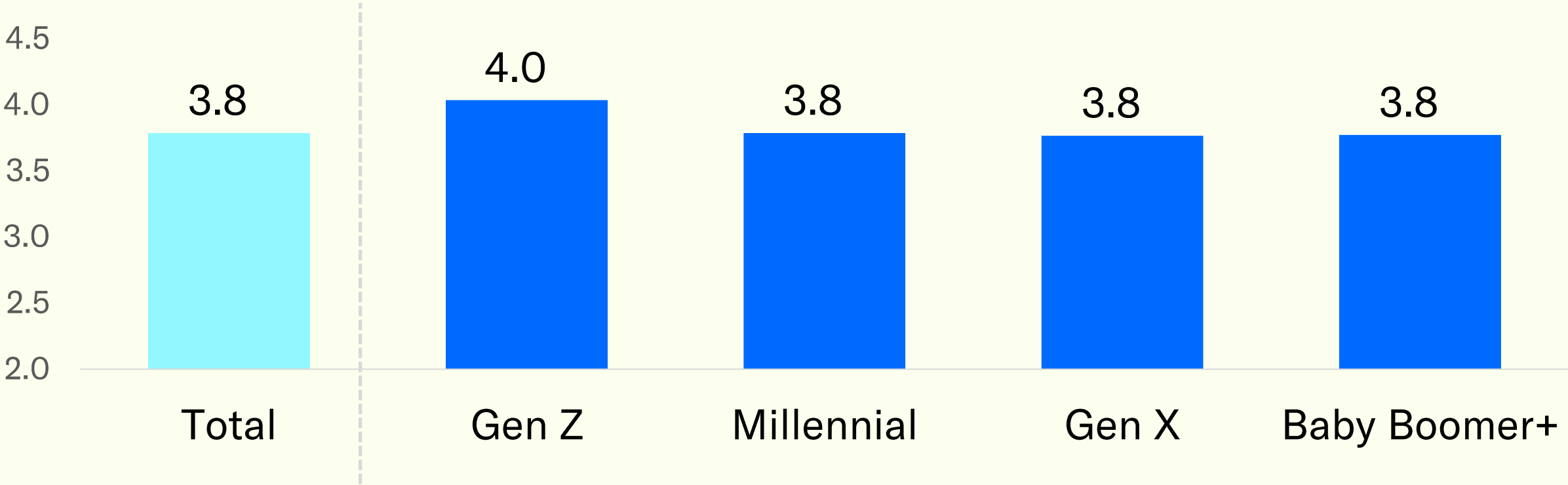
## Question:

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



# GenZ leads Anticipated Trip Volume

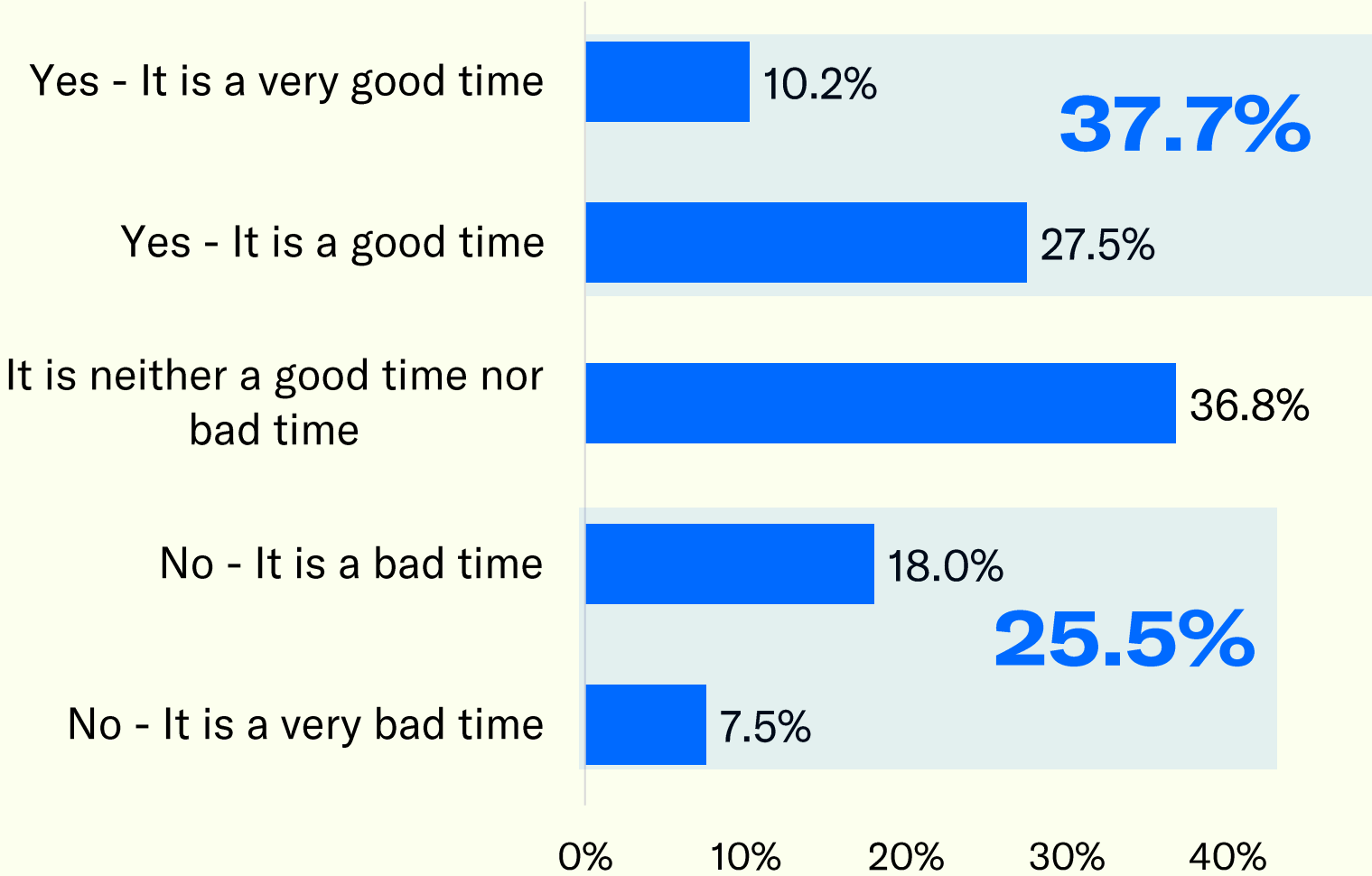
**Question:** IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



# More Travelers This Month Say Now as a Good Time to Spend on Travel

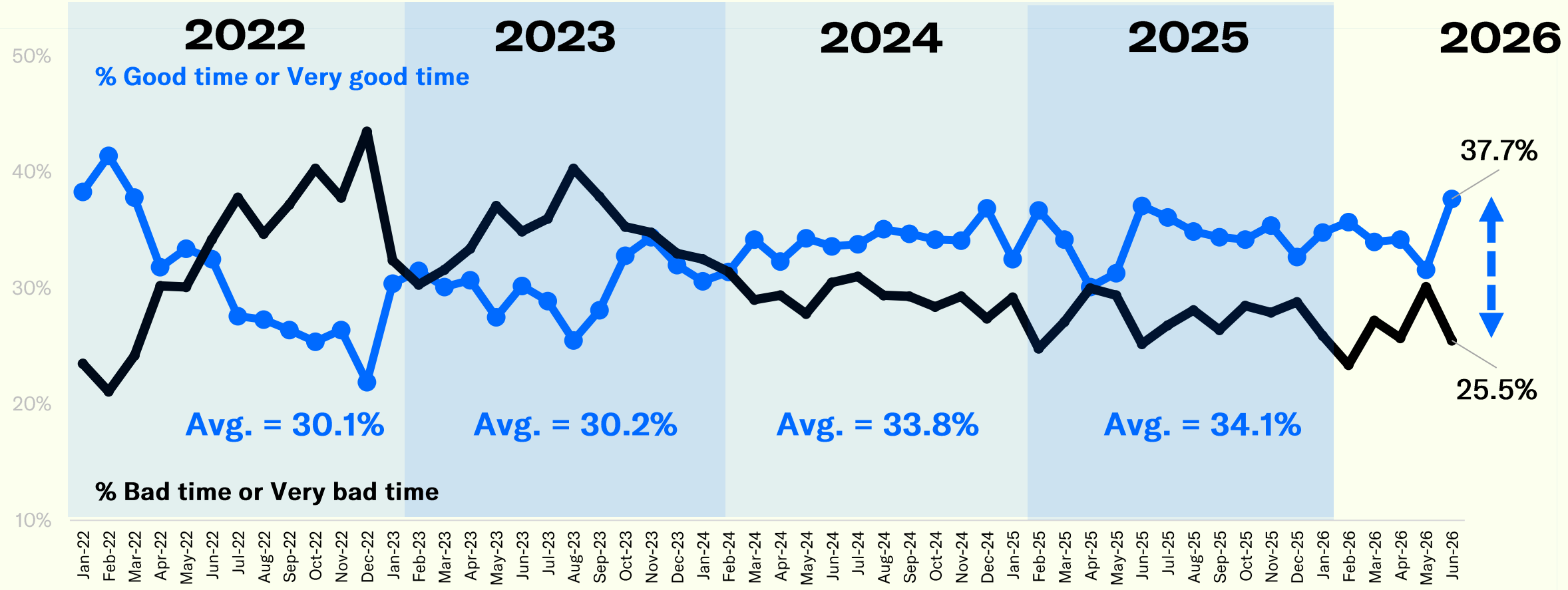
**Question:**

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?

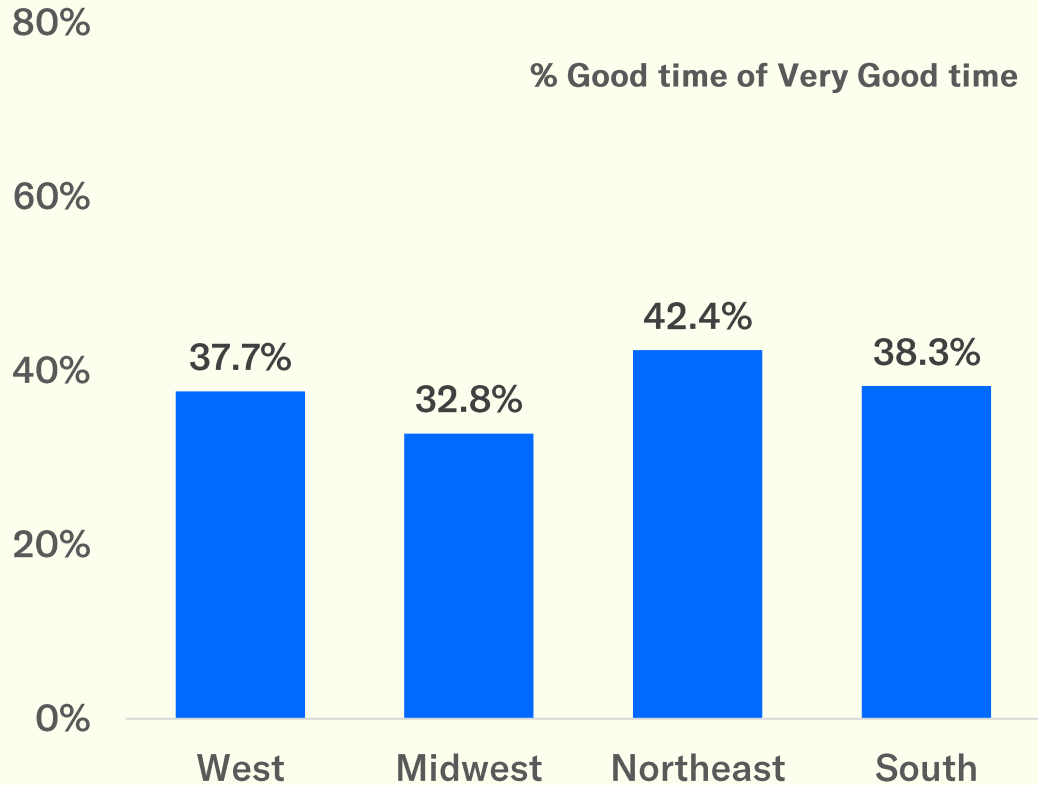


# More Travelers This Month Say Now as a Good Time to Spend on Travel

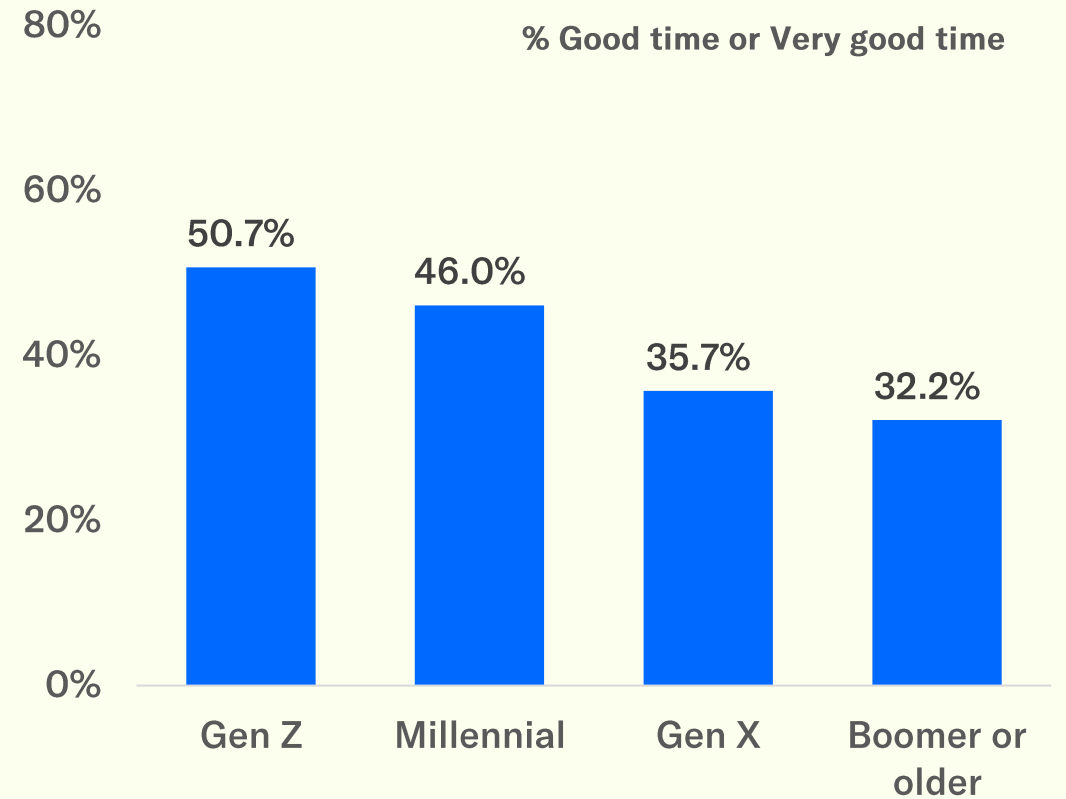
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



# Travelers in the Northeast Are Most Likely Feel Now is a Good Time to Spend on Travel



# Younger Travelers Are the Most Likely to Think Now is a Good Time to Spend on Travel

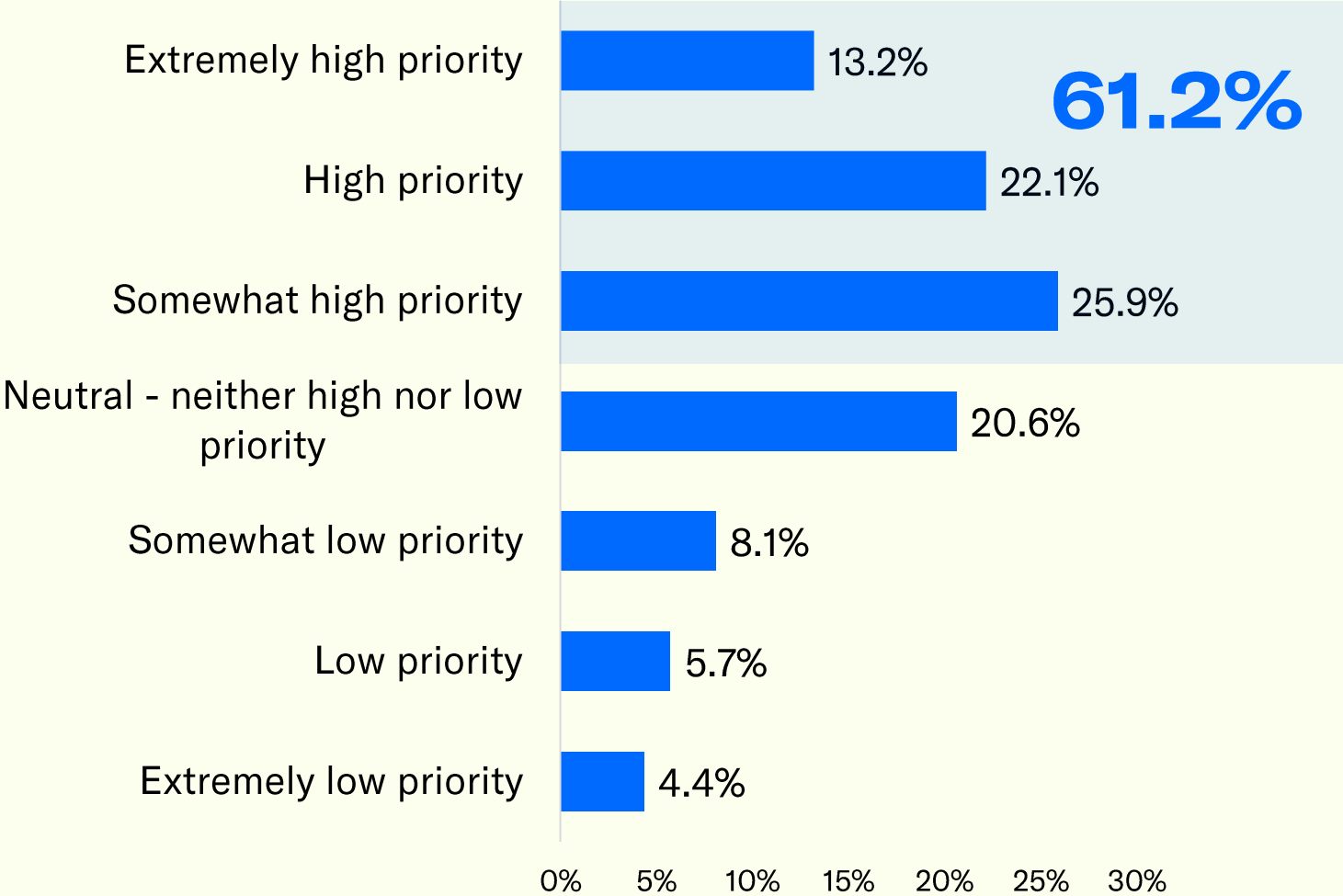


# Travel Still Is Still High In Consumer Spending Priorities

**Question:**

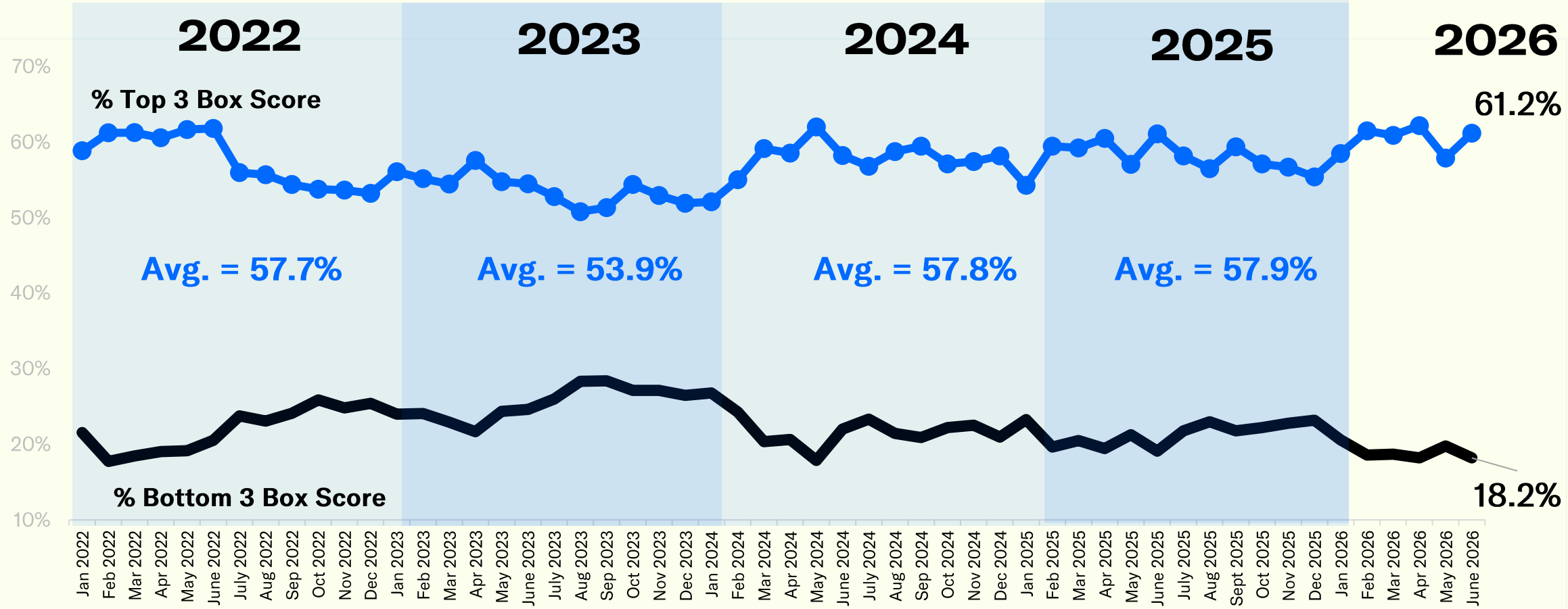
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) \_\_\_\_\_.

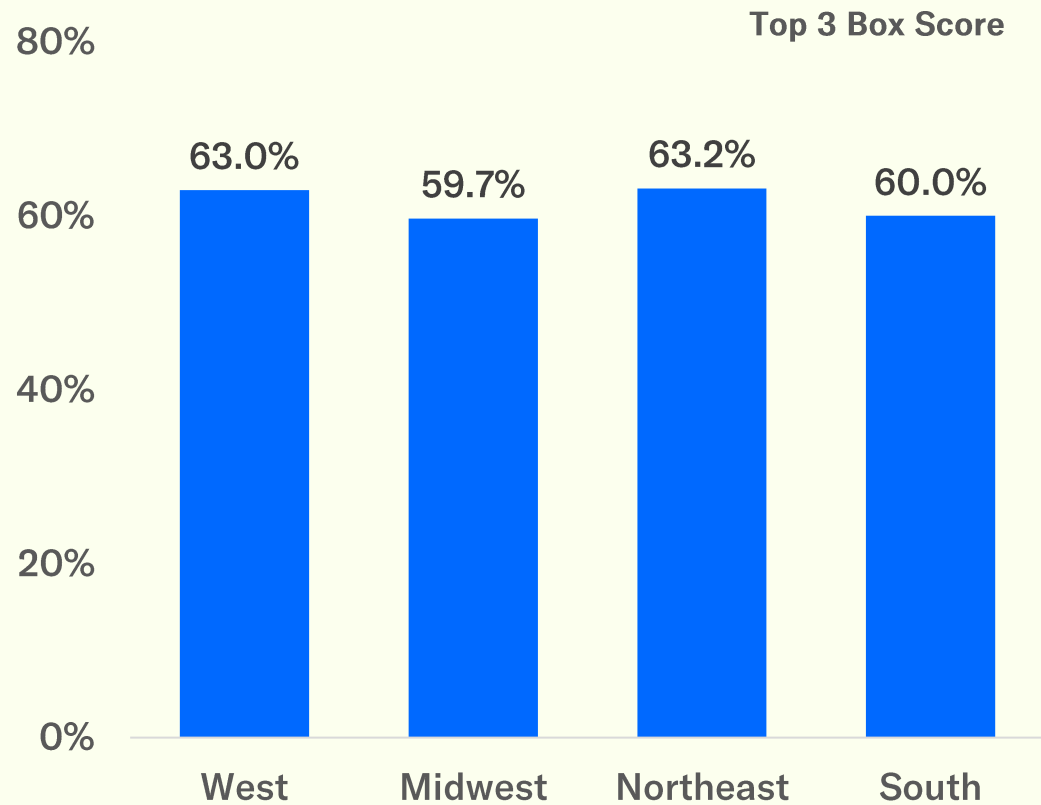


# Travel Still Is Still High In Consumer Spending Priorities

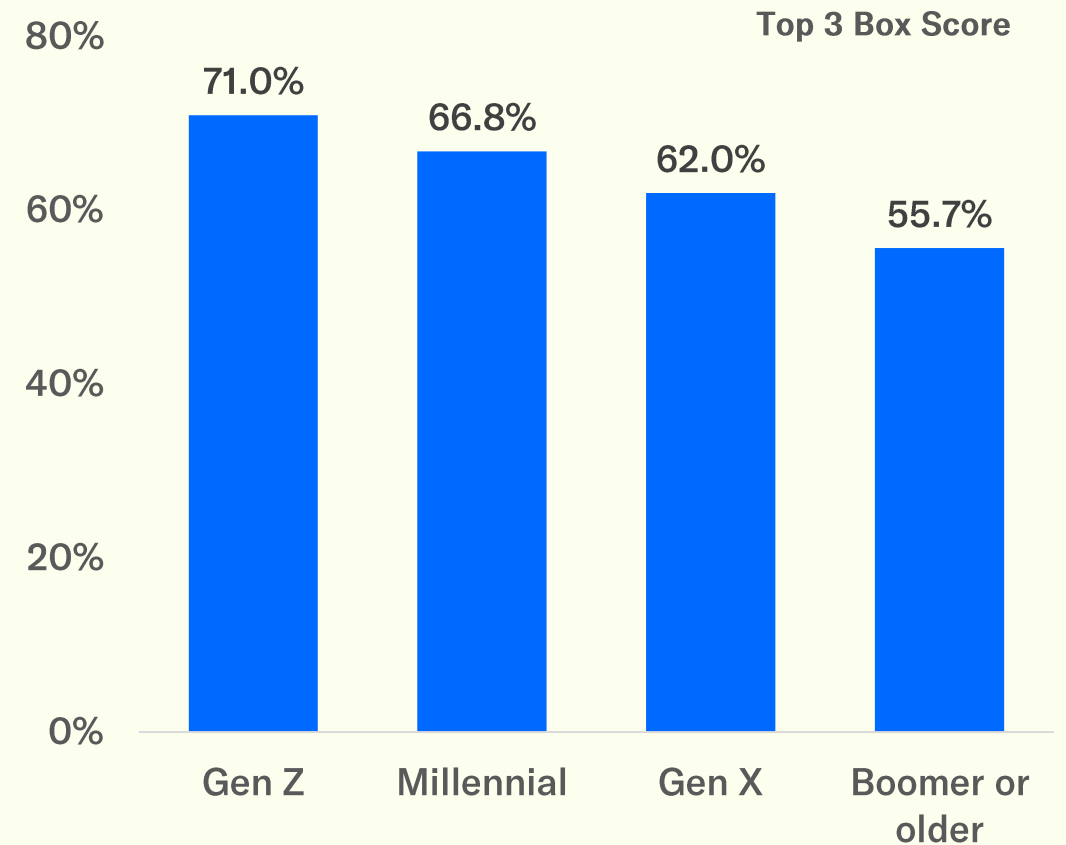
**Question:** Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



# The West and Northeast Are Most Likely To Be Prioritizing Travel in Their Budgets



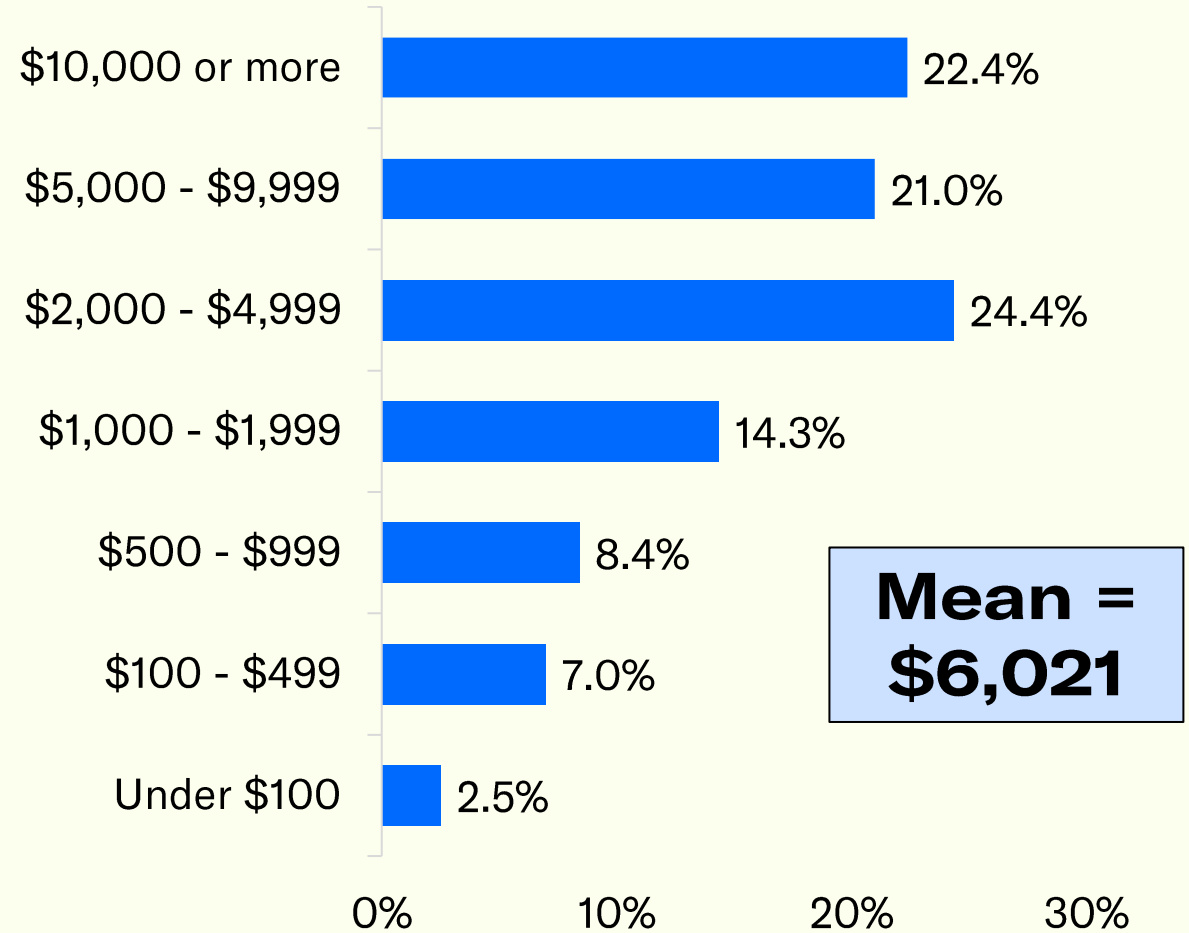
# GenZ Are the Generation Most Likely to Prioritize This Spending



# Average Expected Annual Leisure Travel Budgets Jumped to \$6,021

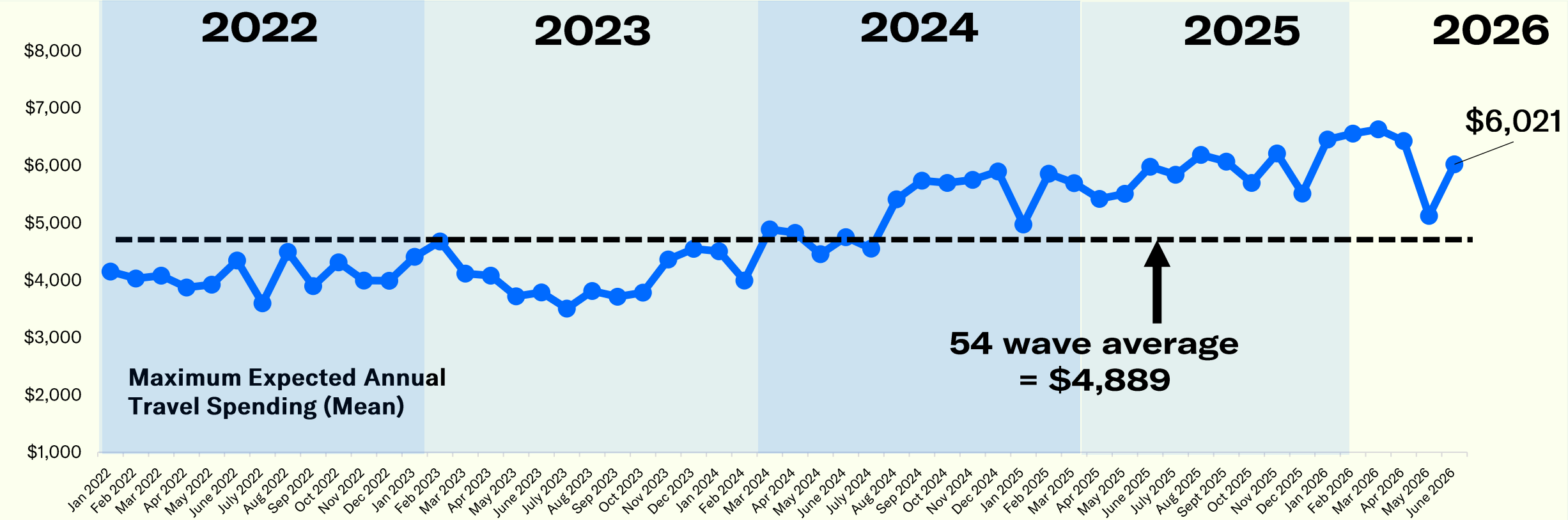
## Question:

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?



# Average Expected Leisure Travel Budgets Rebounded after Last Month's Sharp Fall

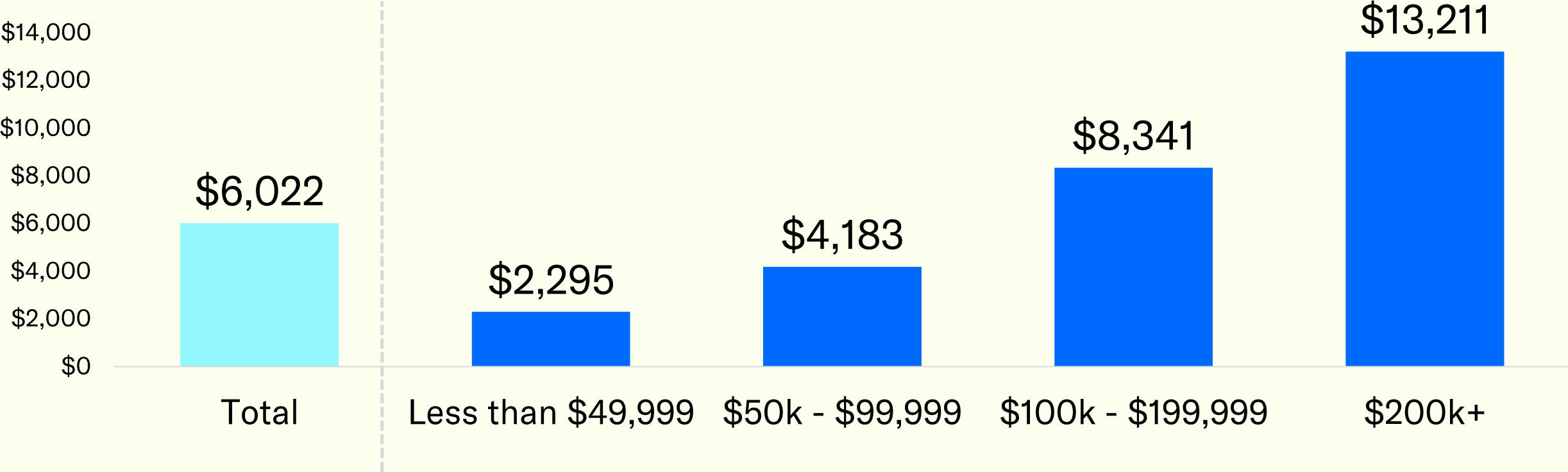
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



# Travel Budgets Double at the \$100K HHI Band

**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?

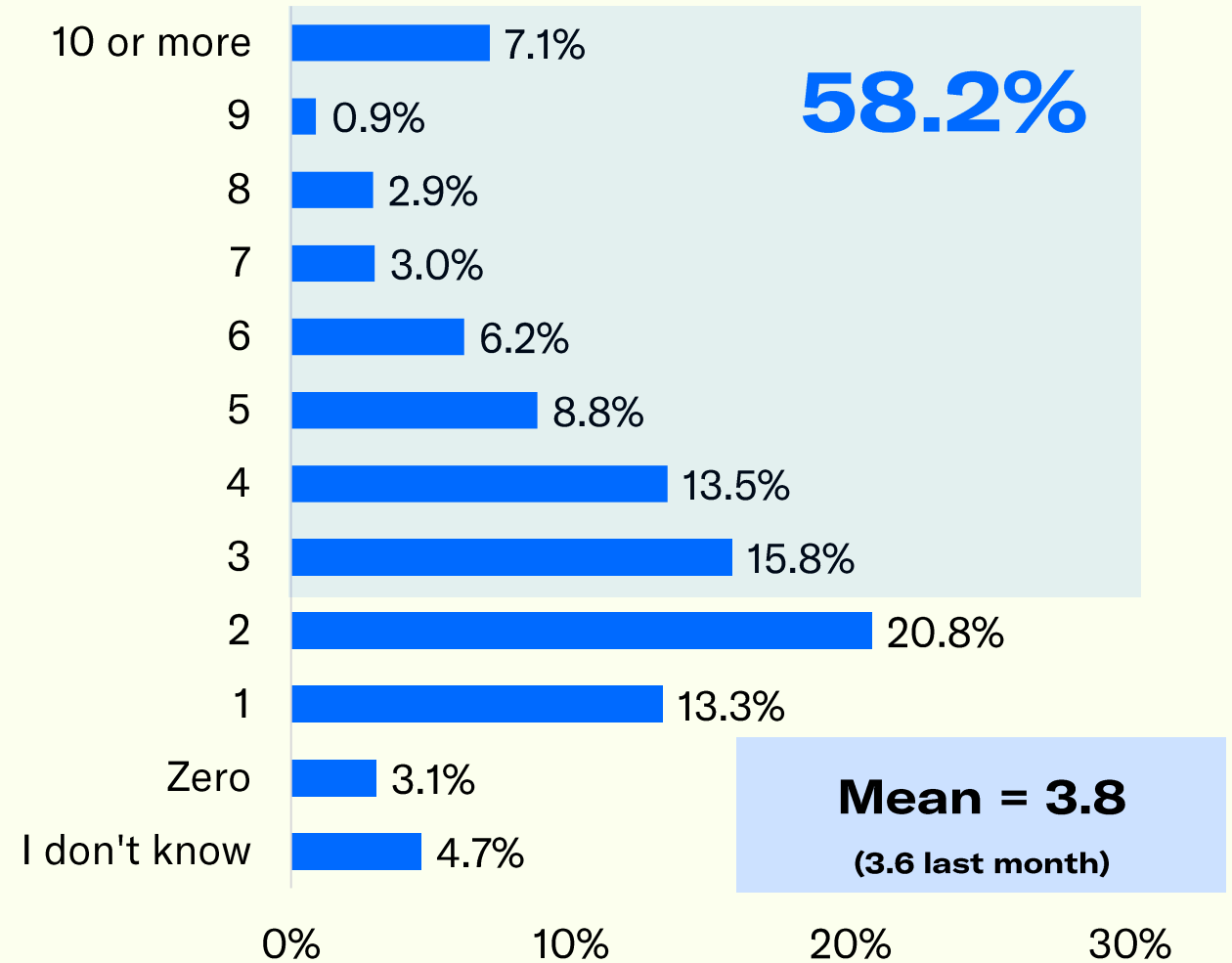
Maximum Annual Travel Budget (Next 12 Months)



# The Average American is Planning 3.8 Leisure Trips in the Next Year

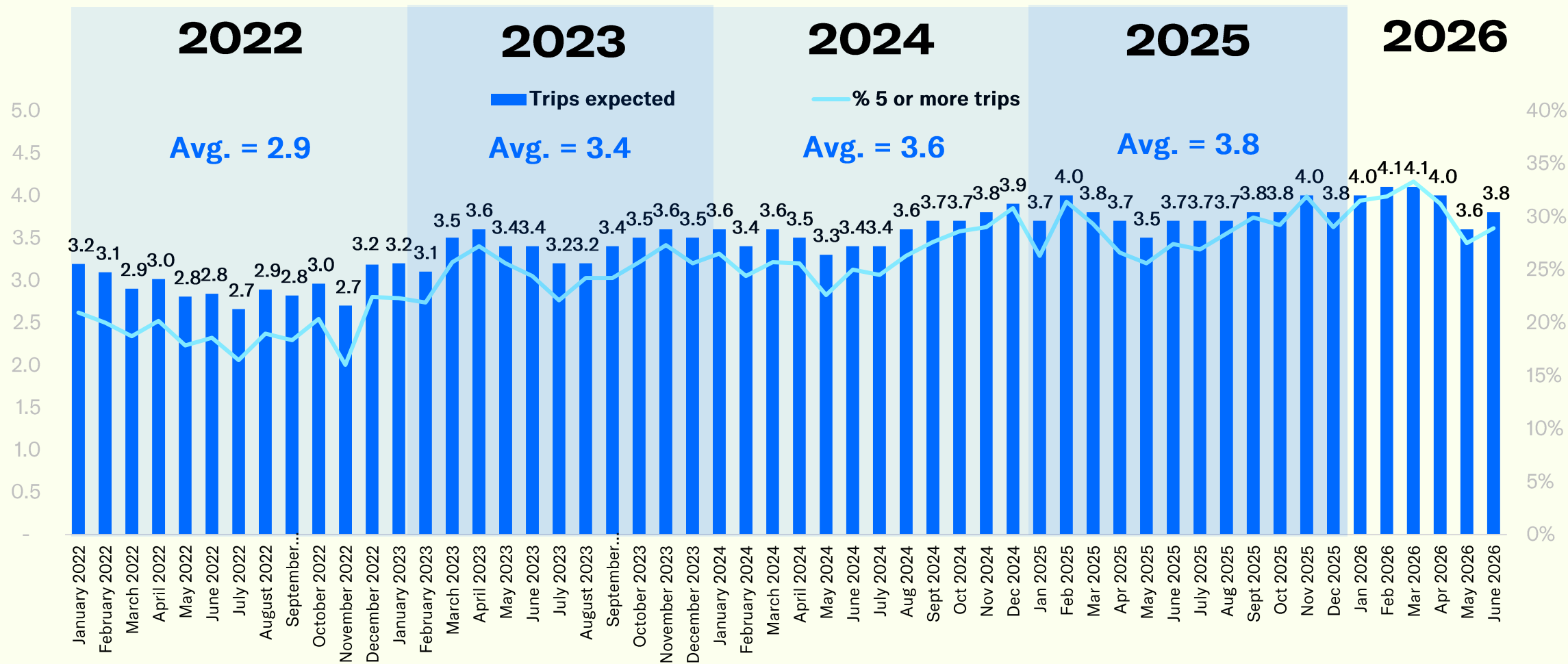
## Question:

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



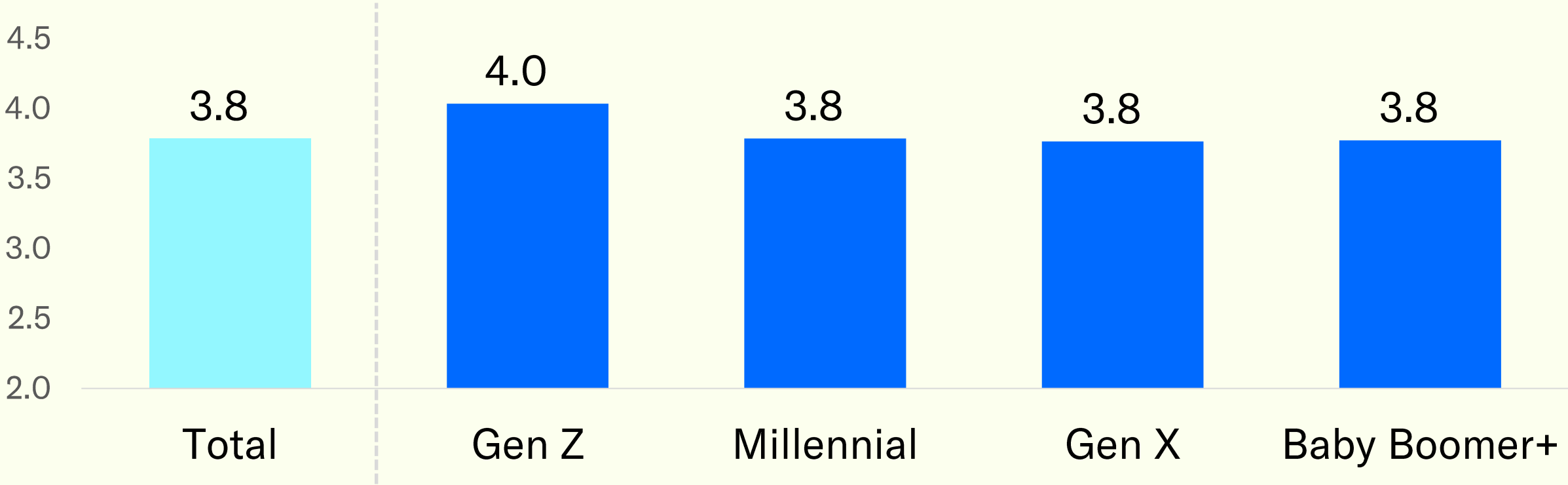
# Trip Expectations Rebounded This Month—Not at Highs Reached Earlier but Slightly Above One-Year Ago

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



# Gen Z Leads Anticipated Trip Volume

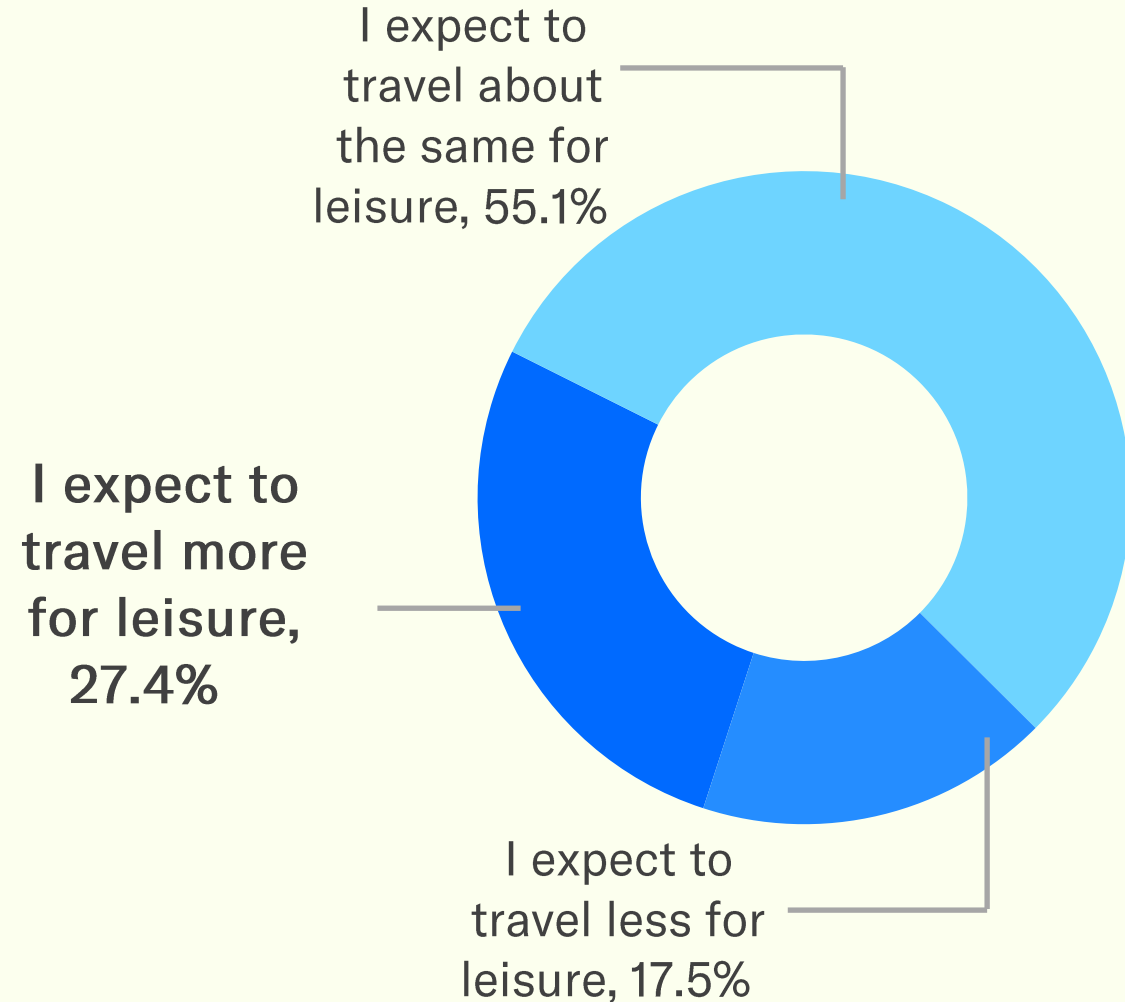
**Question:** IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



# One in Four Expects More Leisure Trips in their Future

## Question:

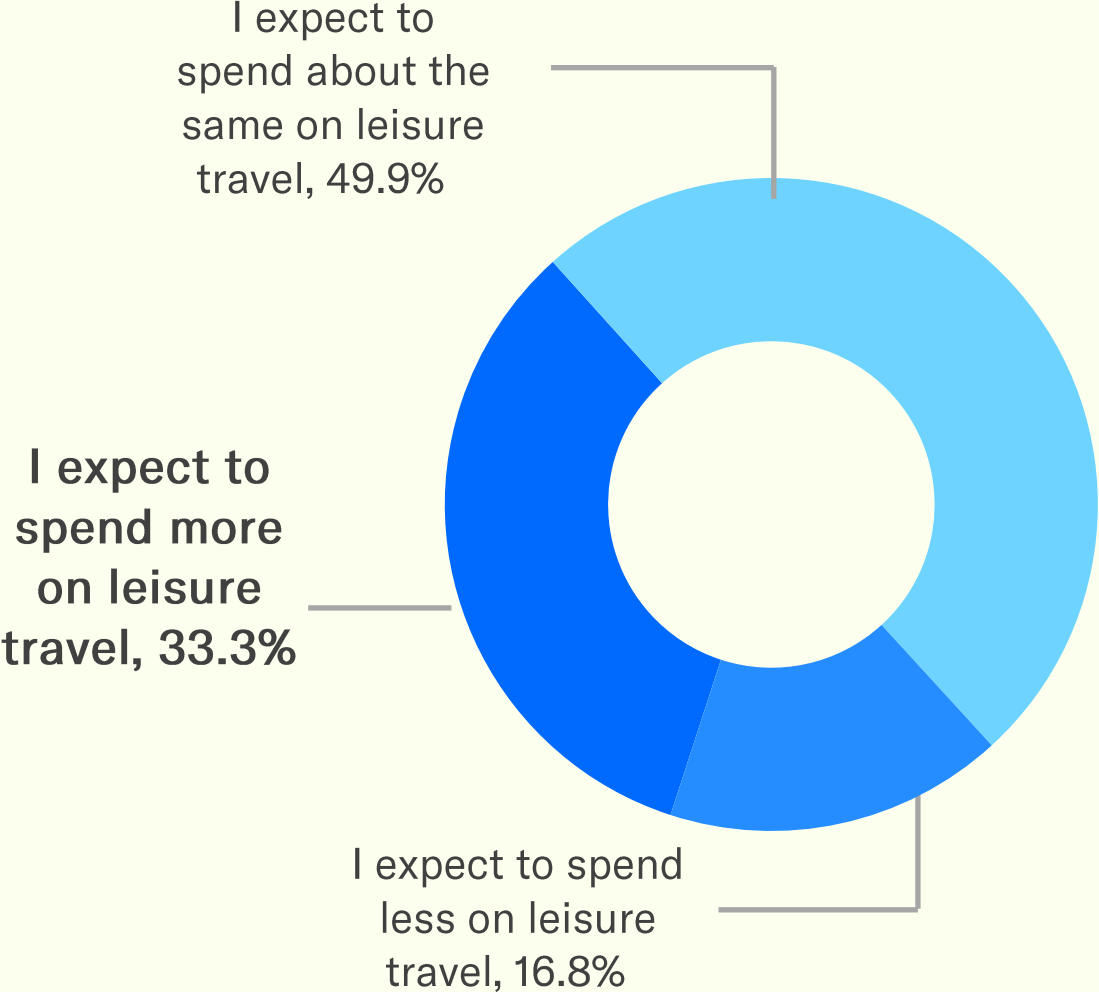
In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)



# One in Three Travelers Plans to Spend More on Leisure Travel Next Year

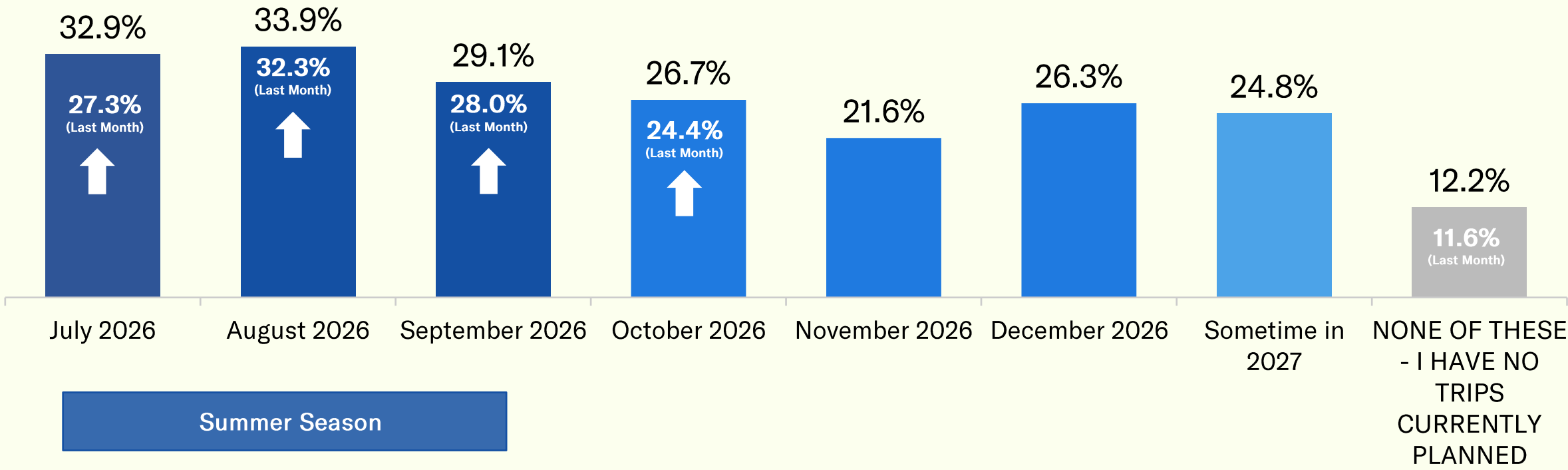
**Question:**

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?  
(Select one)



# Americans' Summer Travel Plans Have Also Rebounded in the Past Month

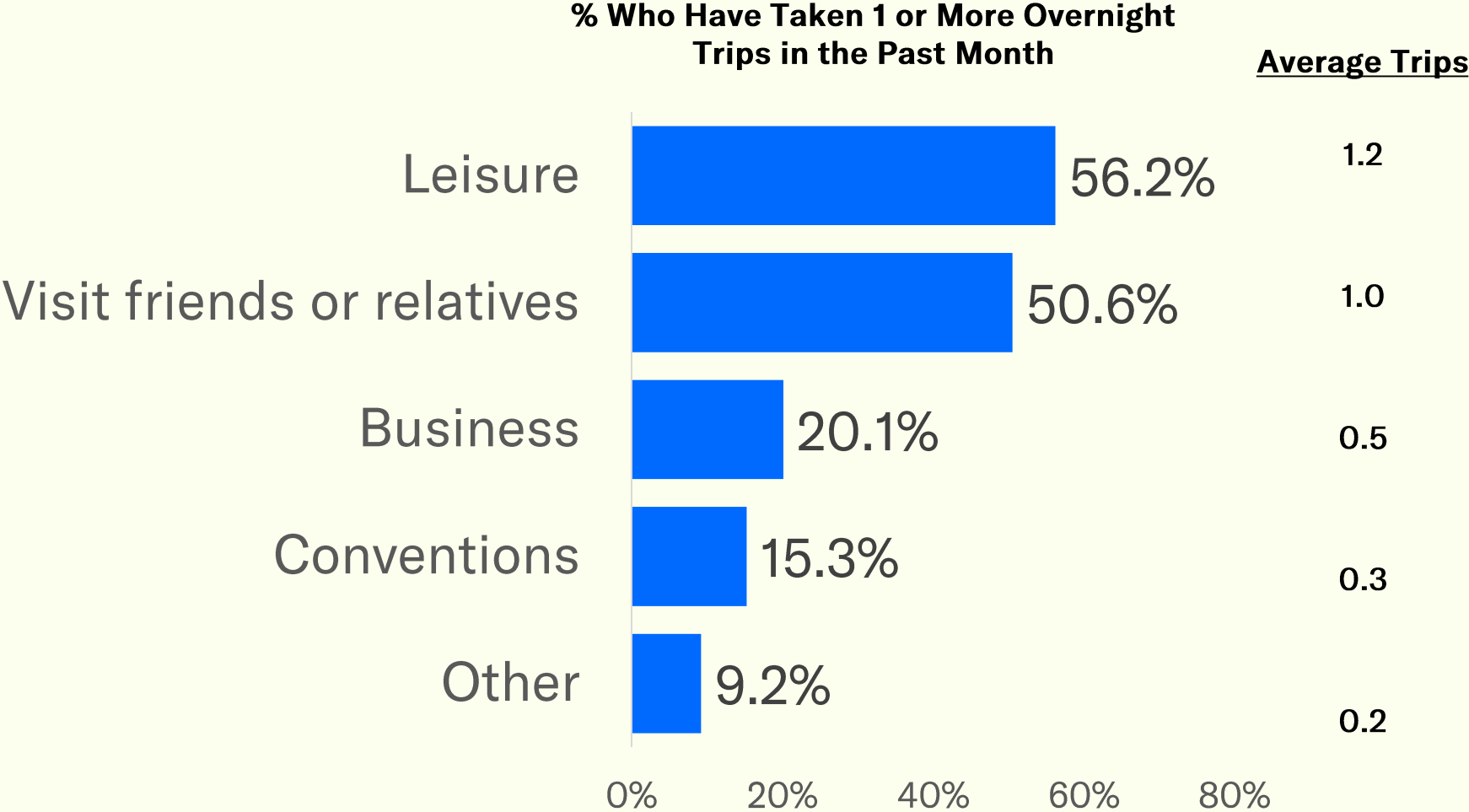
Question: In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)



# Leisure and Visiting Loved Ones Drive Most Recent Overnight Travel

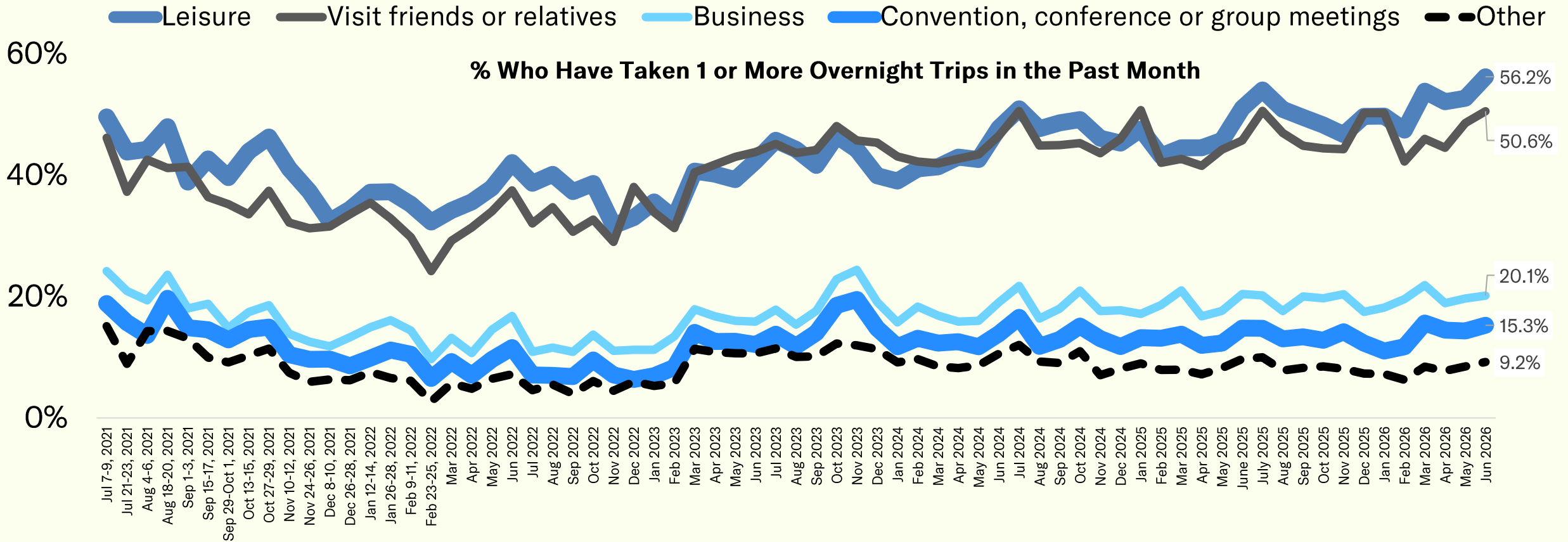
**Question:**

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



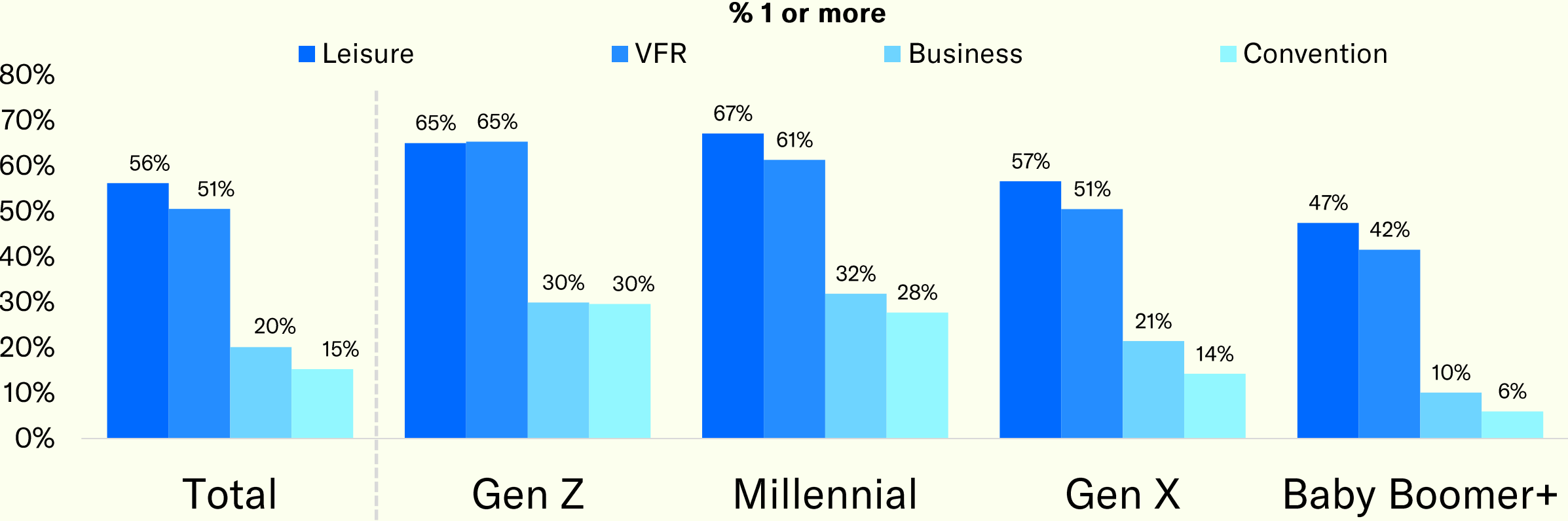
# Leisure Travel Hits a Five-Year High

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



# Millennials and Gen Z Out-Travel Older Generations Across Every Trip Type

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



# Are High Costs Dampening Summer Travel?



# By a wide margin, the top travel deterrents are travel price related

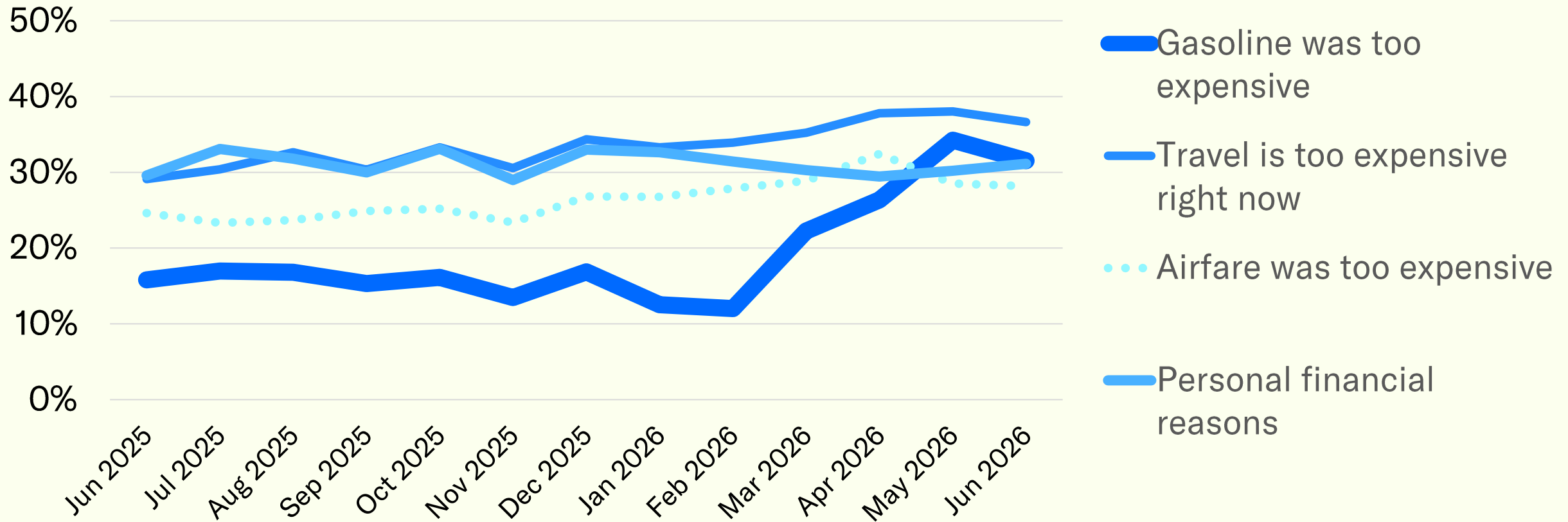
**Question:**

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)



# Price-related travel deterrents increased over Q2

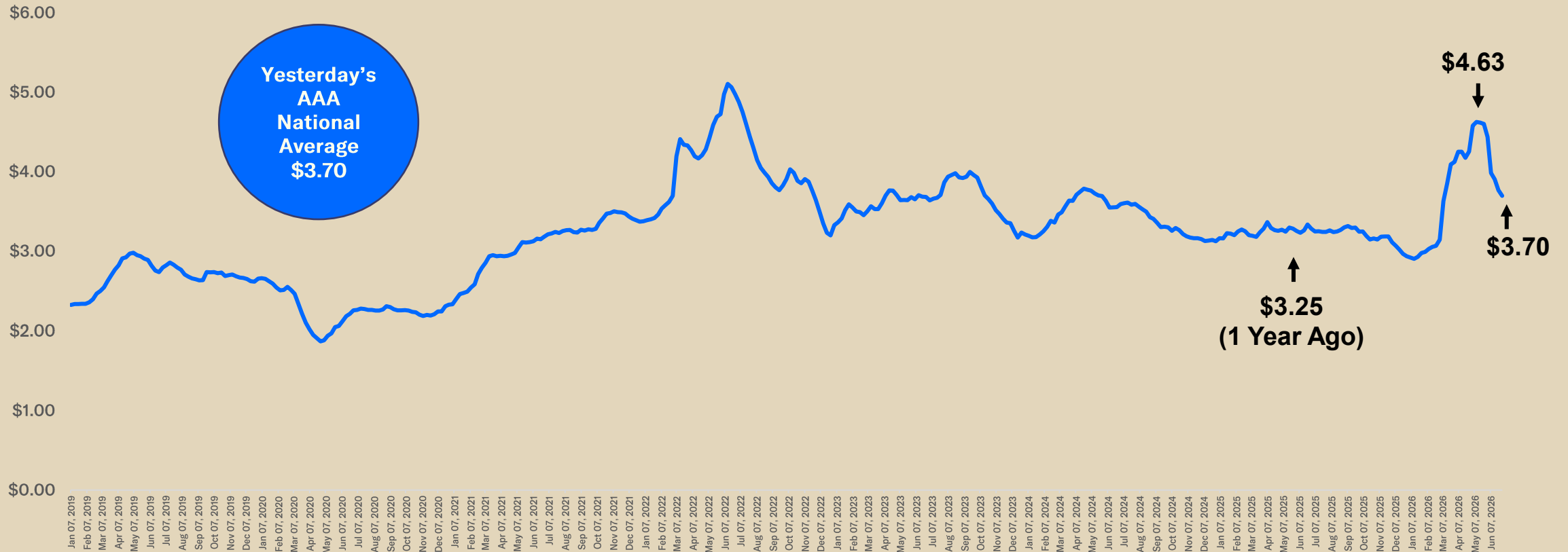
**Question:** In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



# Gasoline Prices \$3.70/Gallon at Month's End

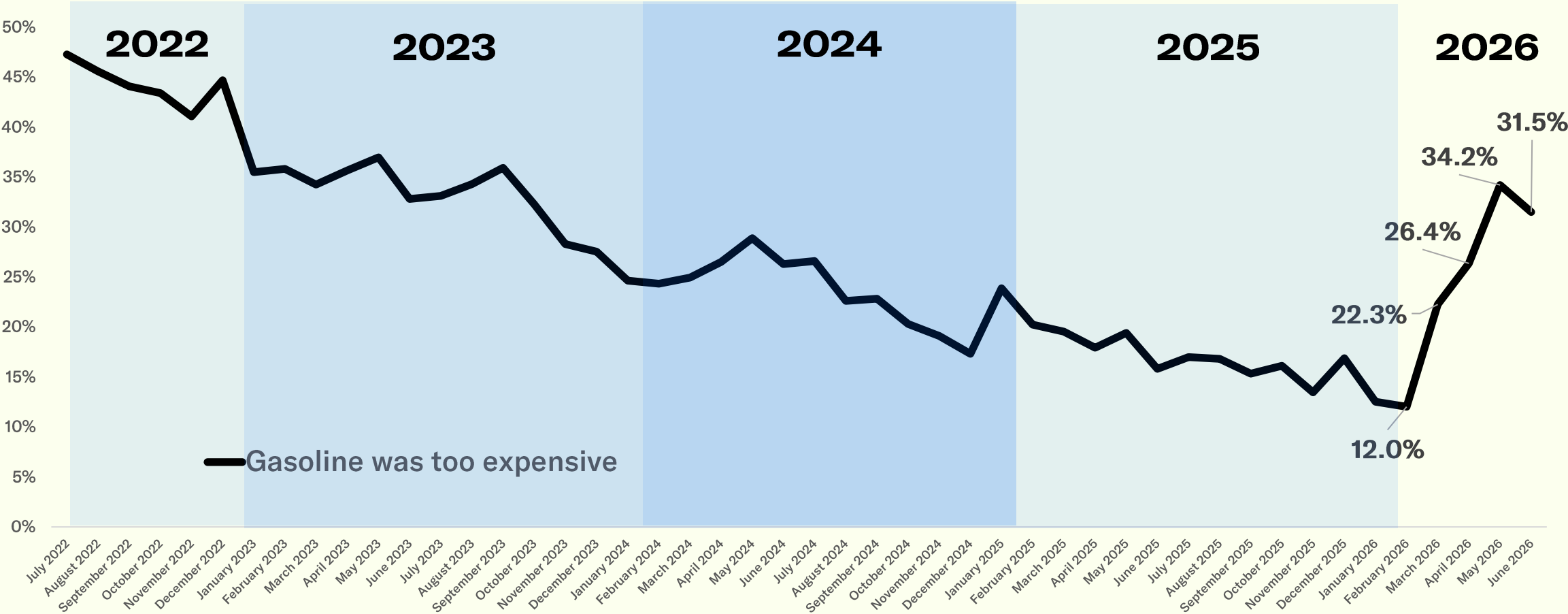
(Recent peak was \$4.43)

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



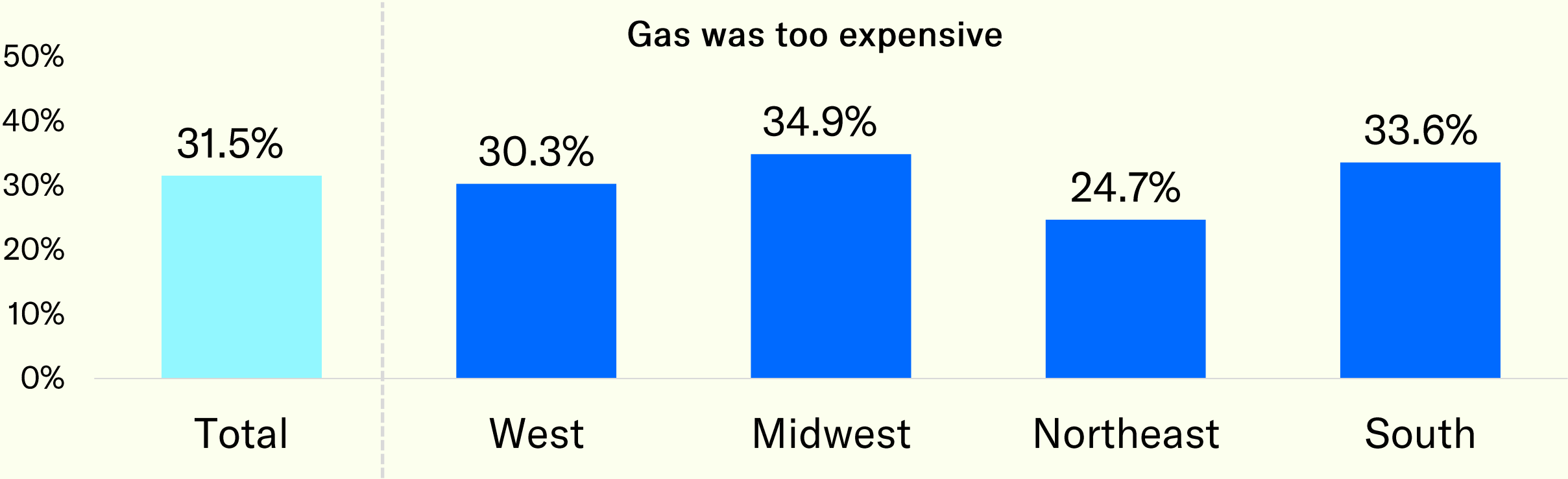
# Gas prices as a deterrent to travel is down

**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)



# Gas prices deter travel unevenly across the country—most in the Midwest, least in the Northeast currently

**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). Base: Respondents who selected “Gasoline was too expensive.”



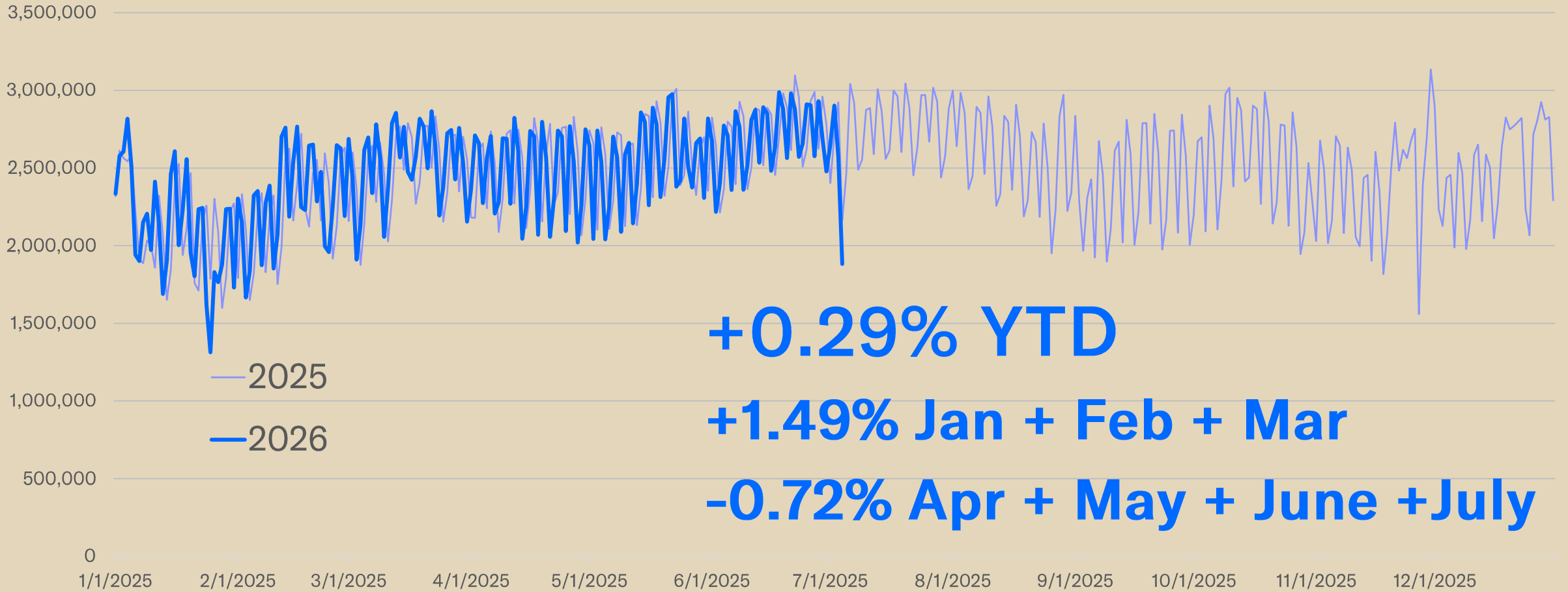
WORLD NEWS

# Trump warns Iran that US is preparing for more strikes after saying ceasefire is over



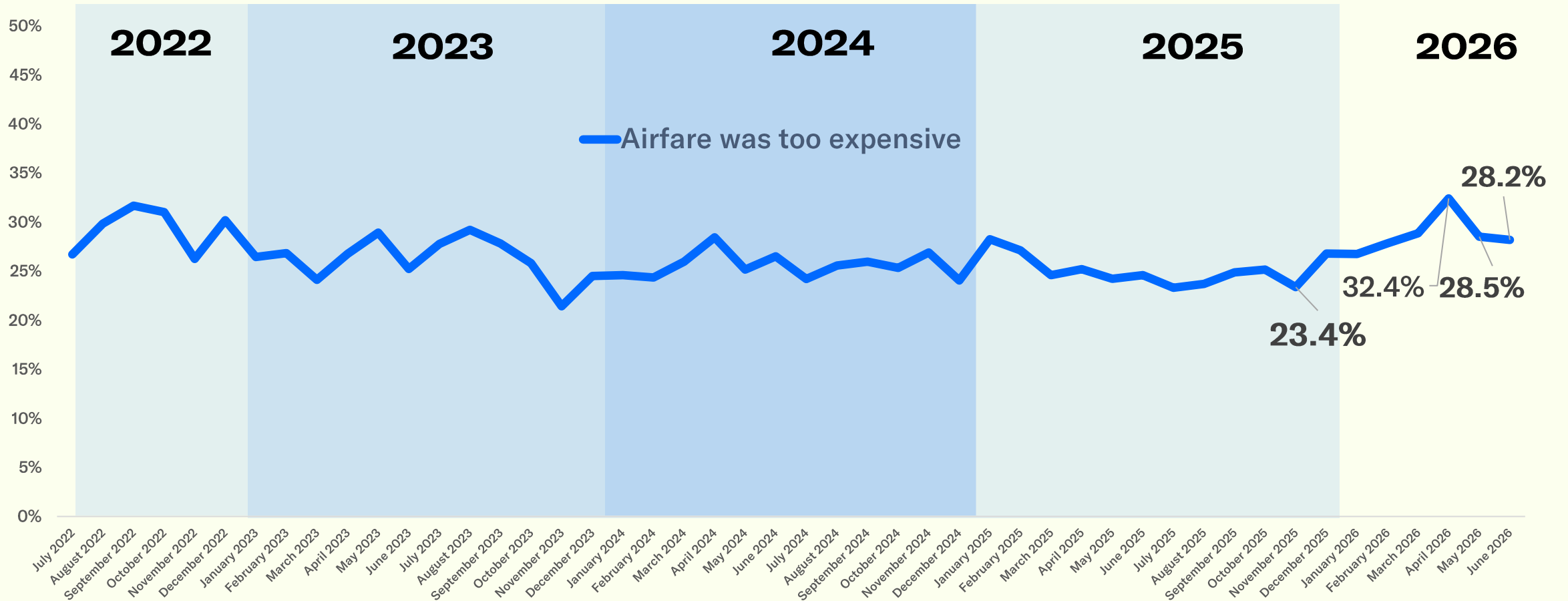
# Year-Over-Year Air Travel Growth Decelerates

## 2026 and 2025 TSA checkpoint travel numbers



# Airfare Cost as a Travel Deterrent Retreats

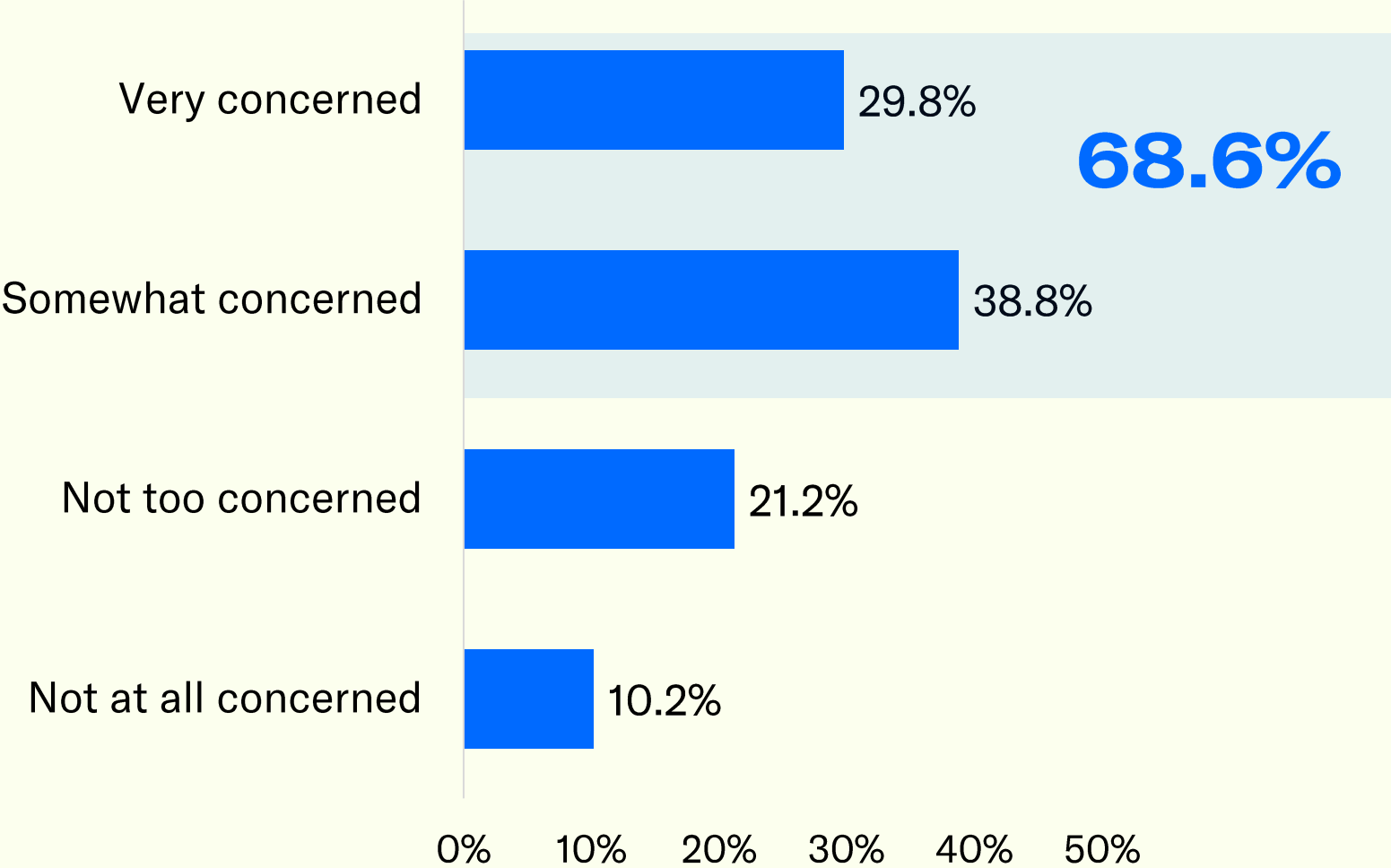
**Question:** In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



# Concerns About Fuel Costs are Very High

**Question:**

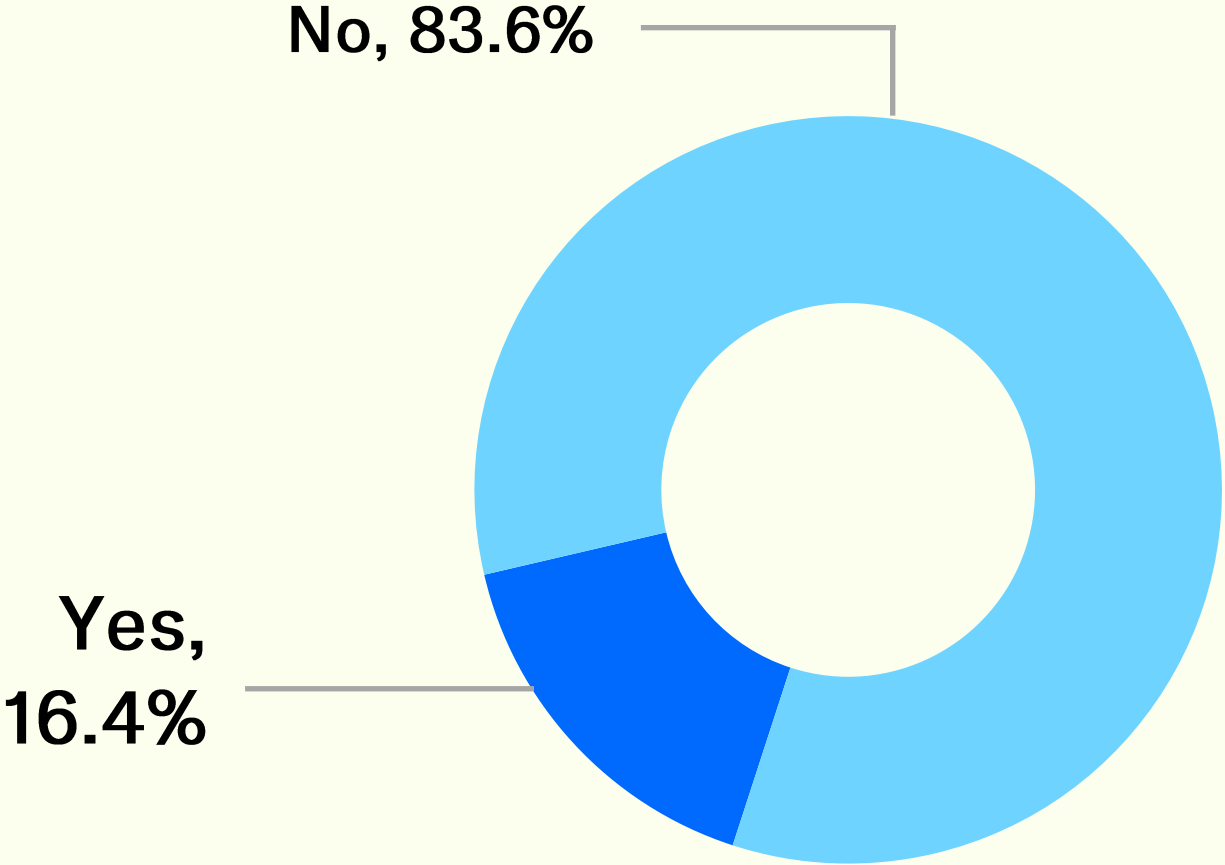
How concerned are you about fuel costs affecting your ability to travel this summer?



# Fewer Have Canceled an Upcoming Trip Due to Rising Costs.

**Question:**

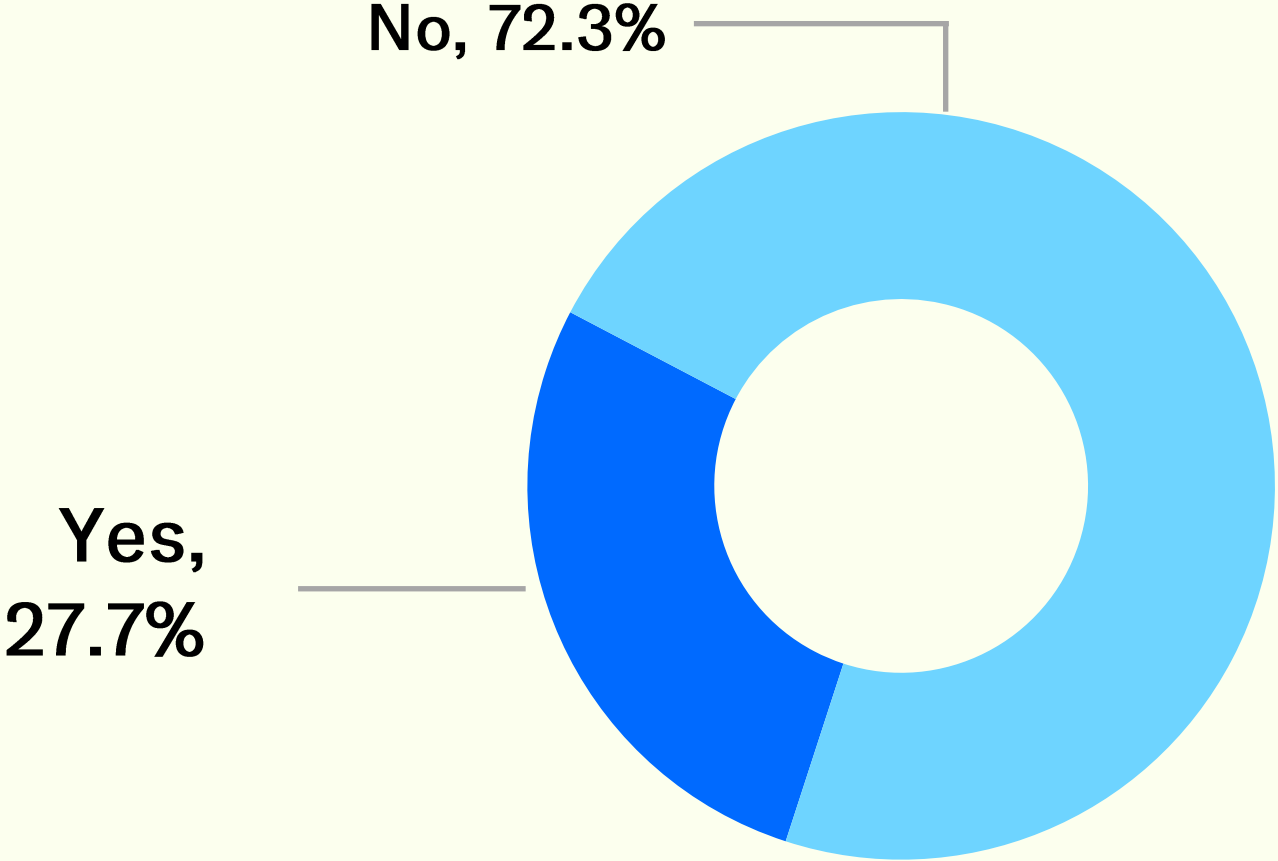
Have you **cancelled** any upcoming trips specifically due to rising costs?



# Over One Quarter of Travelers Have Postponed a Trip Due to Rising Costs

**Question:**

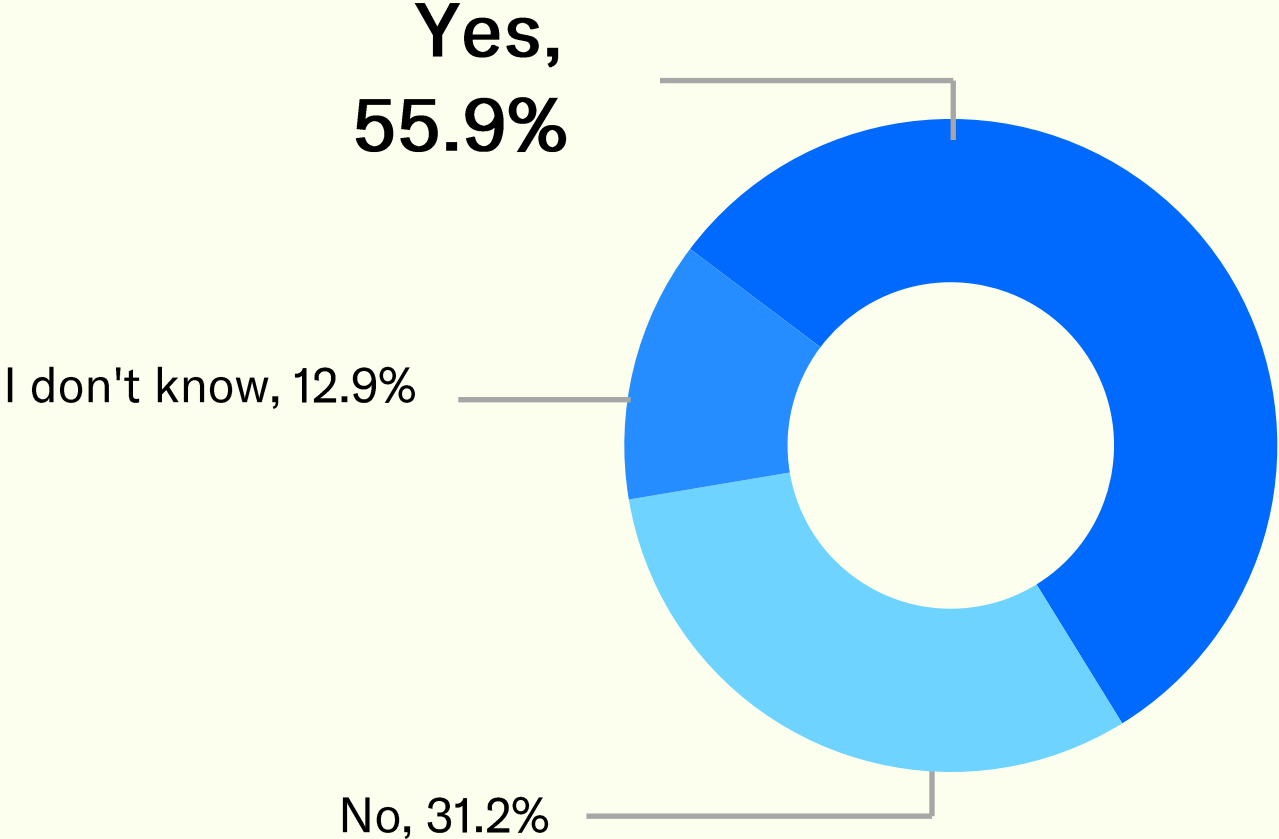
Have you **postponed** any upcoming trips specifically due to rising costs?



# Most Travelers Still Plan to Take a Summer Road Trip.

**Question:**

Do you plan to take a road trip this summer?



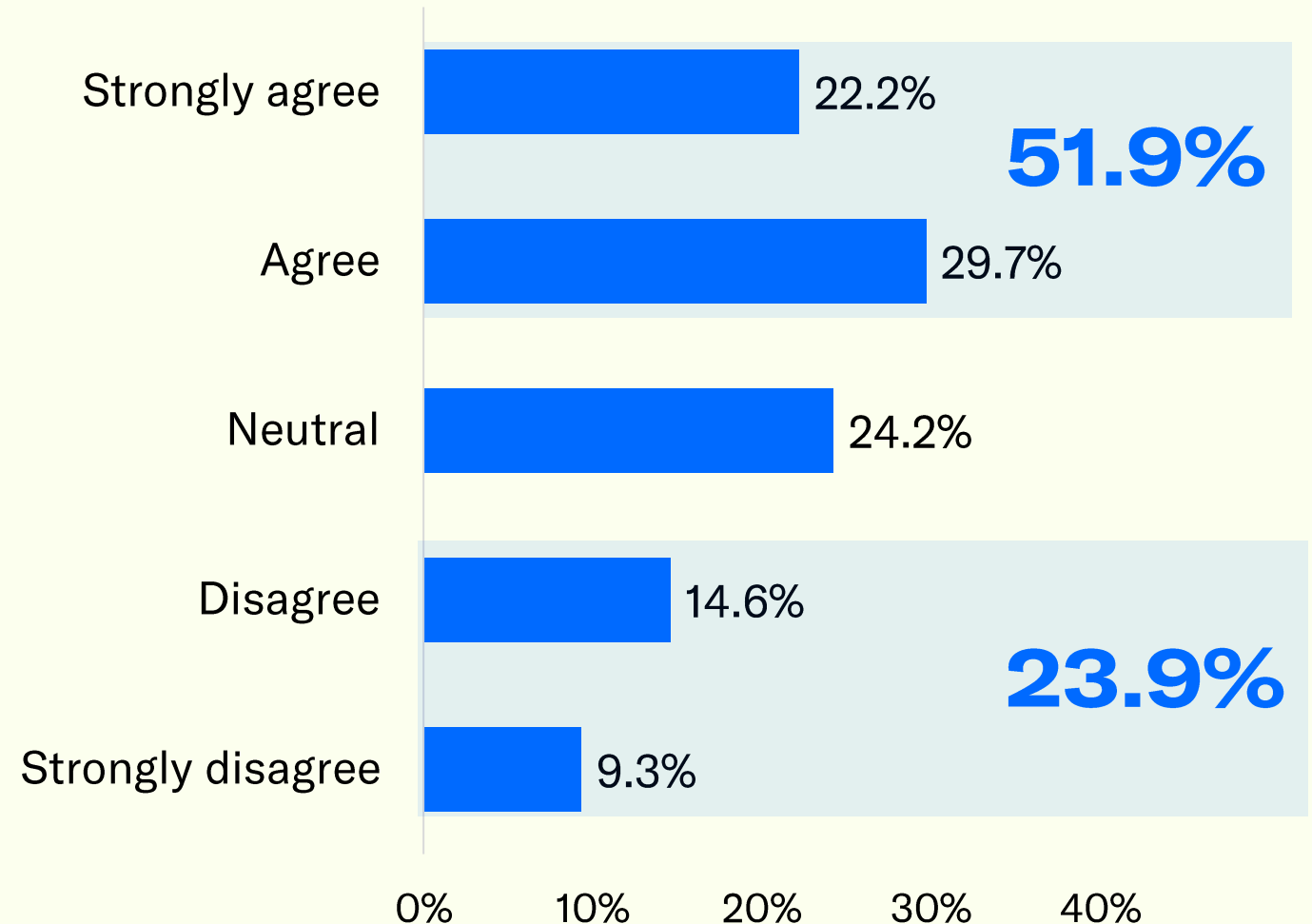
# Half Say They Will Cut Back on Summer Road Trips if Gas Prices Don't Come Down

## Statement

### Agreement:

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

If gasoline prices don't come down, I'll be taking fewer road trips this summer.

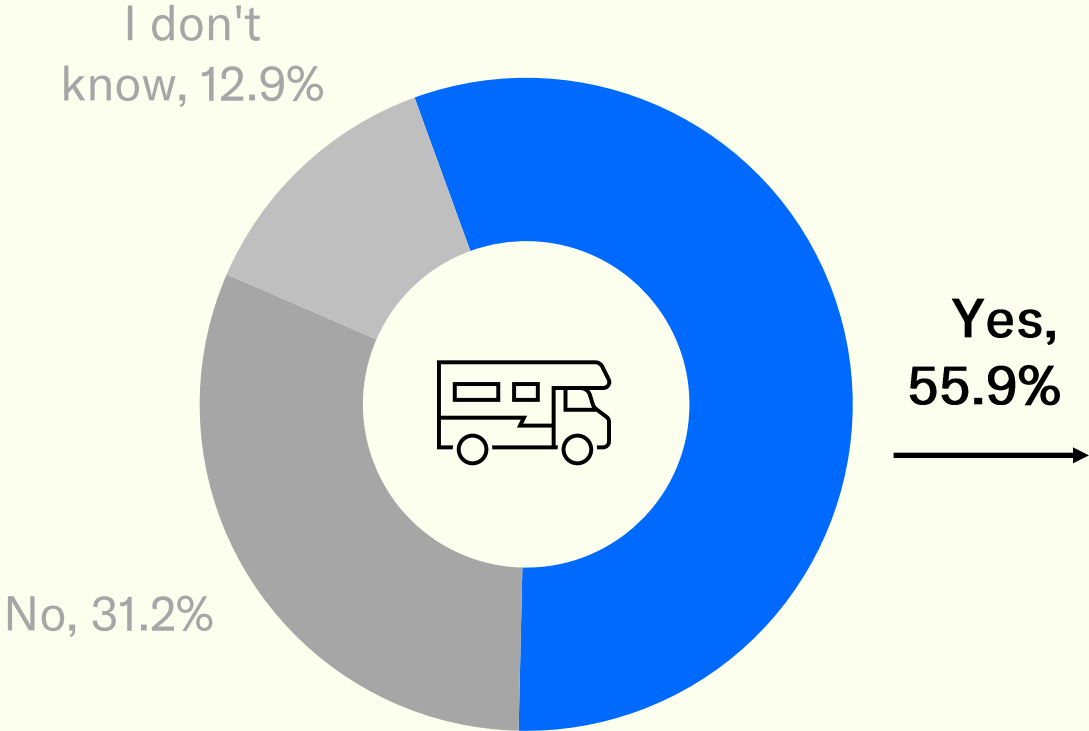


A vibrant collage representing a road trip. A central road with a yellow double line leads towards a coastal scene with a blue ocean and rocky cliffs. A rainbow arches over the road. The background features rugged, reddish-brown mountains and a field of colorful flowers (yellow, red, orange) in the foreground. Two white cars are parked on a road to the right.

# The Committed Summer Road Tripper

# The Committed Summer Road Tripper

**Question:** Do you plan to take a road trip this summer?



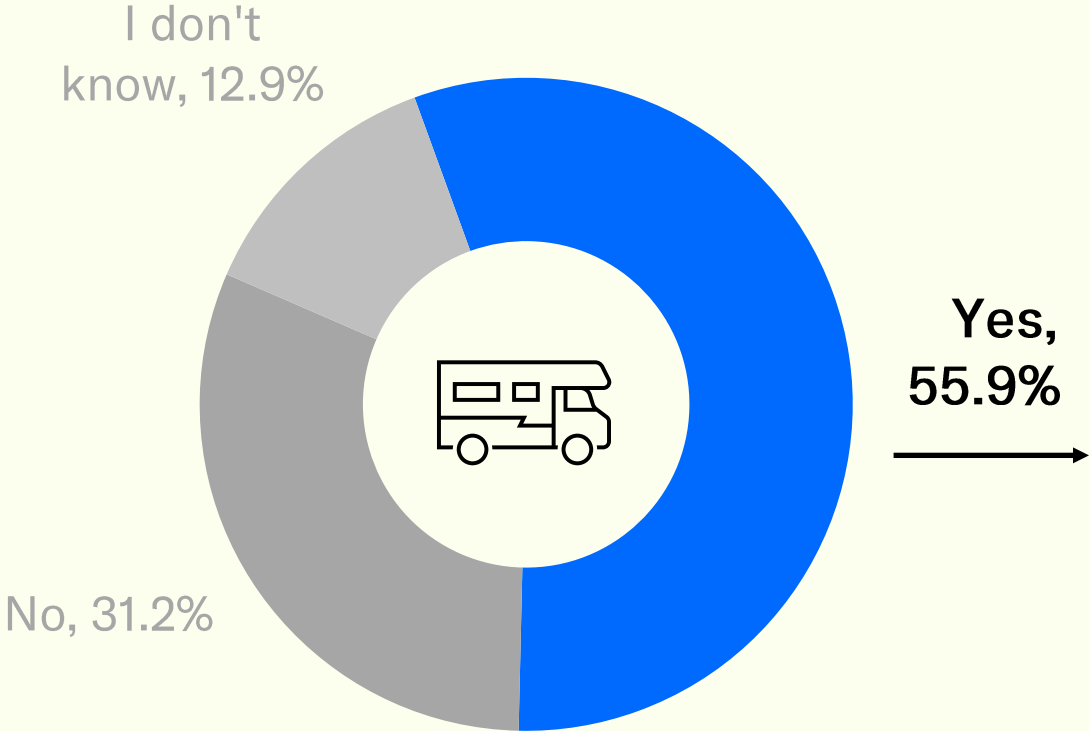
## Demographics

<b>Generation Breakdown:</b>	Boomer+	29.1%
	Gen X	27.2%
	<b>Millennials</b>	<b>33.0%</b>
	Gen Z	10.7%
<hr/>		
<b>Which Best Describes Where You Live?</b>	<b>Suburban area</b>	<b>45.1%</b>
	Large city	34.2%
	Rural area	12.7%
	Small town	8.0%



# The Committed Summer Road Tripper

**Question:** Do you plan to take a road trip this summer?

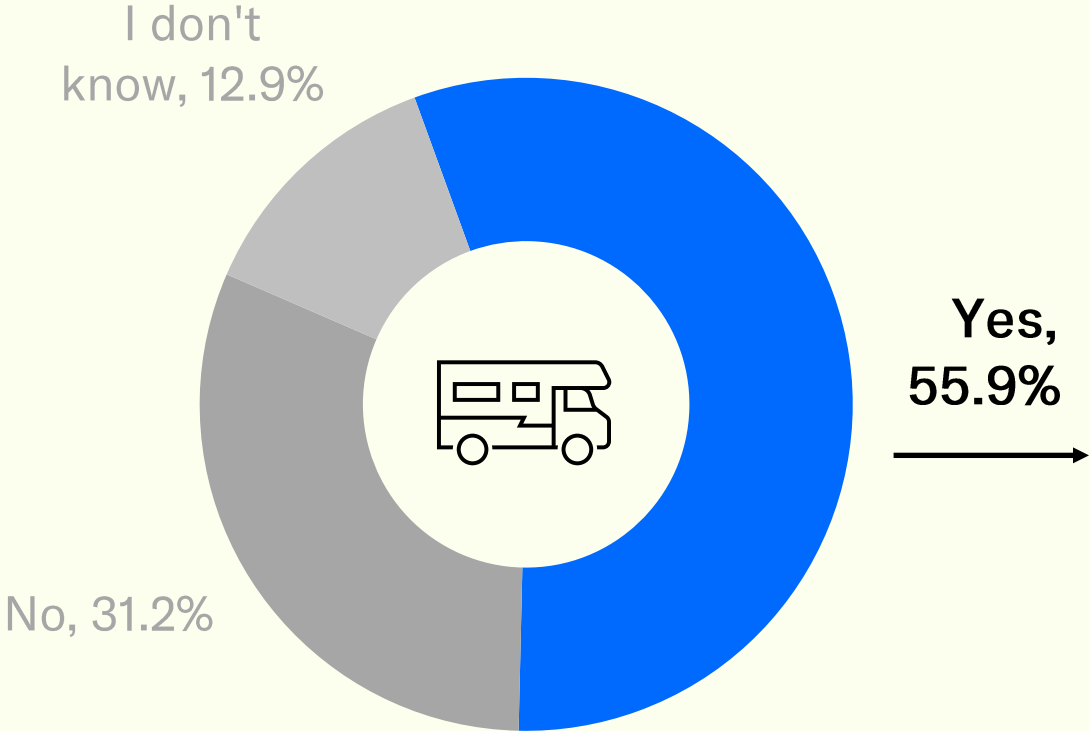


## Passions they Over Index on compared to Average American Traveler:

Food and cuisine
Camping
Music festivals (multi-day events)
Musical concerts
Hiking (day hikes)
Hiking (over-night on trail, longer haul)
Photography
Enjoying theme or amusement parks
Fishing (Freshwater)
Attending professional sports (large-venue, like NFL)
Recreational vehicle travel
Agri-tourism (Visiting farms, orchards, wineries, etc.)
Fitness, health and wellness
Video games
Bars, nightclubs

# The Committed Summer Road Tripper

**Question:** Do you plan to take a road trip this summer?

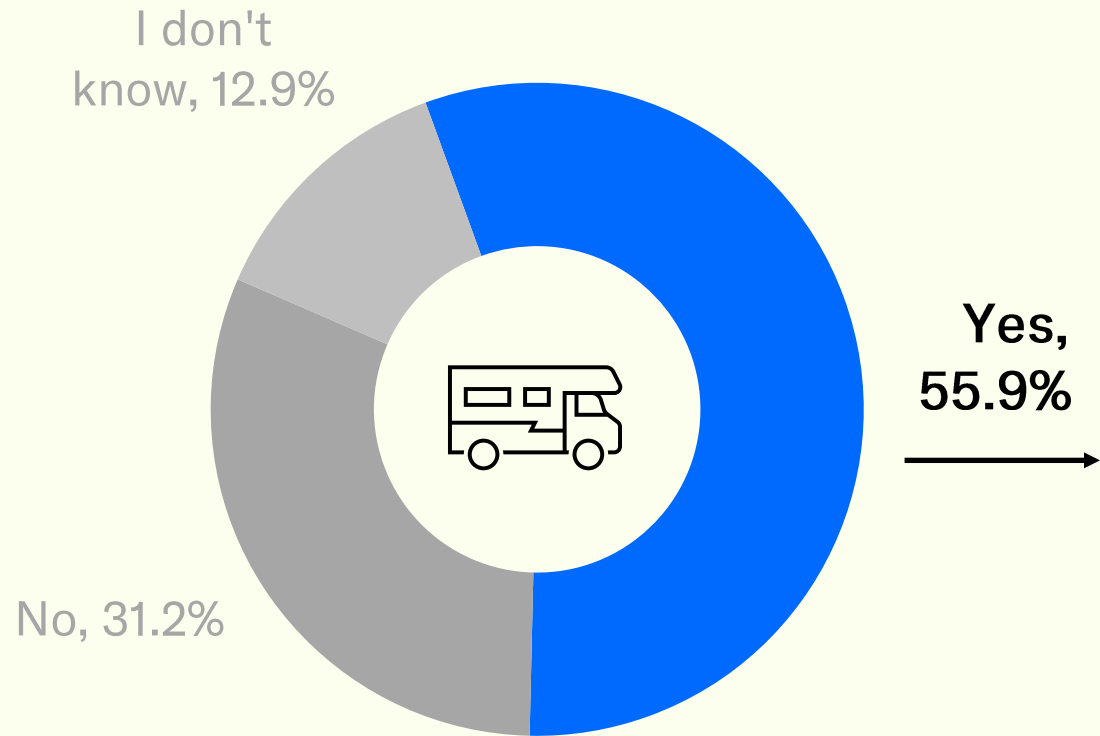


## Use of DMO Resources to Plan Travel in the Past 12 Months:

	Total	Summer Road Tripper
Official destination website	24.9%	31.5% ↑
Official visitor guide (online version)	17.1%	22.3% ↑
Official visitor guide (printed version)	11.3%	14.4% ↑
Official visitor information center	9.0%	11.5% ↑
Official destination APP on a mobile phone or tablet	4.7%	6.4% ↑

# The Committed Summer Road Tripper

**Question:** Do you plan to take a road trip this summer?



## Maximizing Value is Key:

Finds Travel Rewards Programs Important to their trip Planning:

**61.4%**  
Important or Very Important

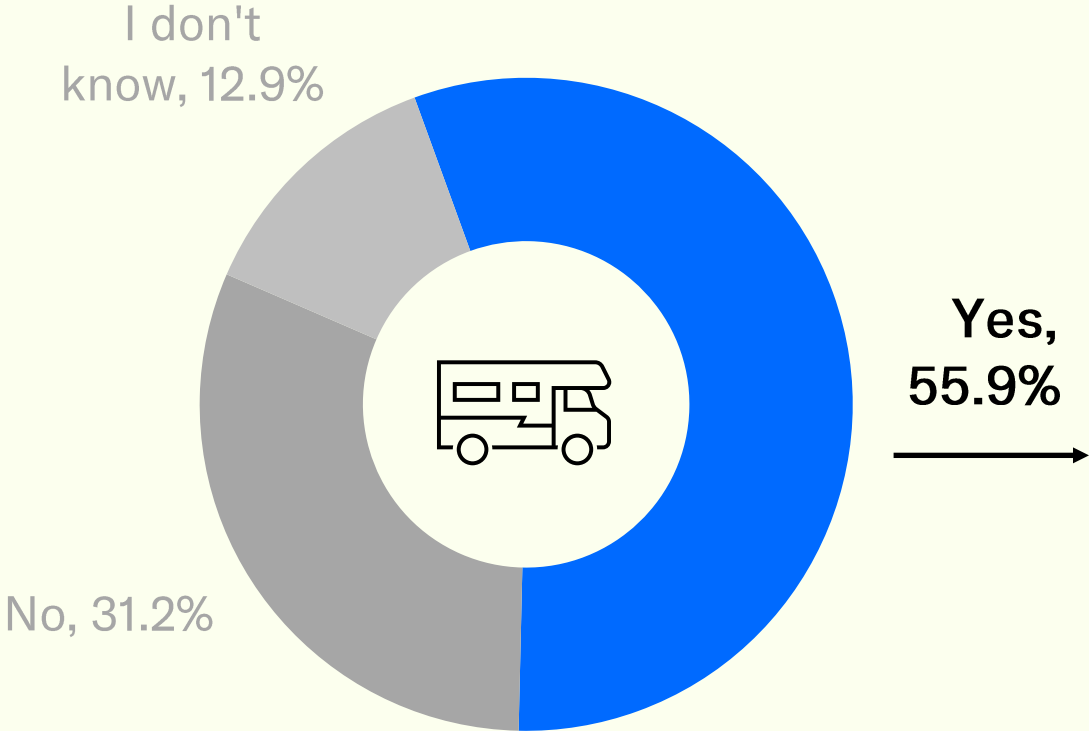
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Used Credit Card Points/Rewards for Travel-Related Purchases (Past 12 Months):

**52.6%**

# The Committed Summer Road Tripper

**Question:** Do you plan to take a road trip this summer?



## Travel is Wellness:

How important is it to you that your leisure trips support your physical, mental, or spiritual well-being?

**74.5%**  
Important or  
Very Important

(68.8% for All  
American Travelers)

# Where Travelers Want to Go: Destinations Driving Aspiration



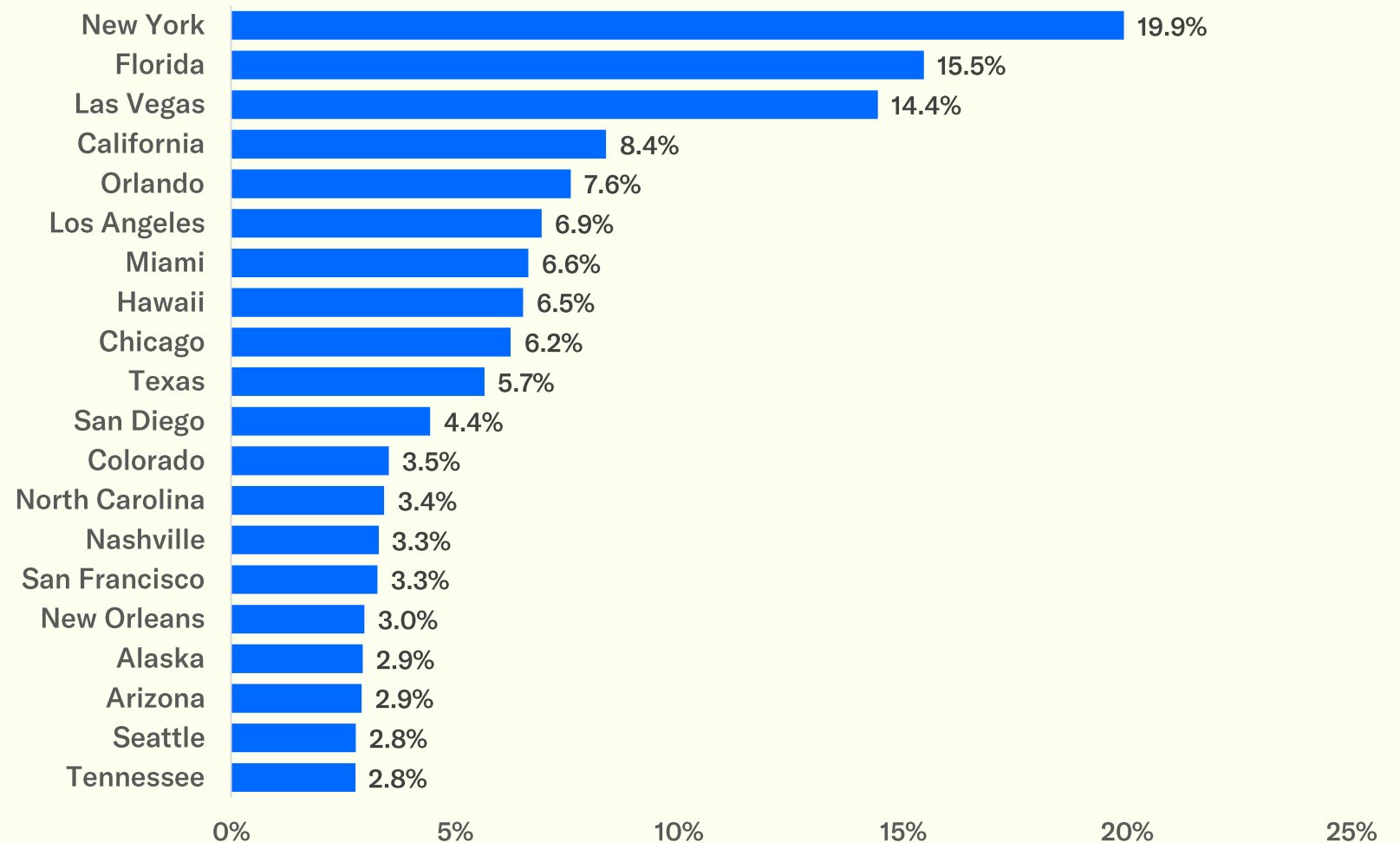
We Asked...

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

# New York and Florida Top This Month's Domestic Destination Hot List

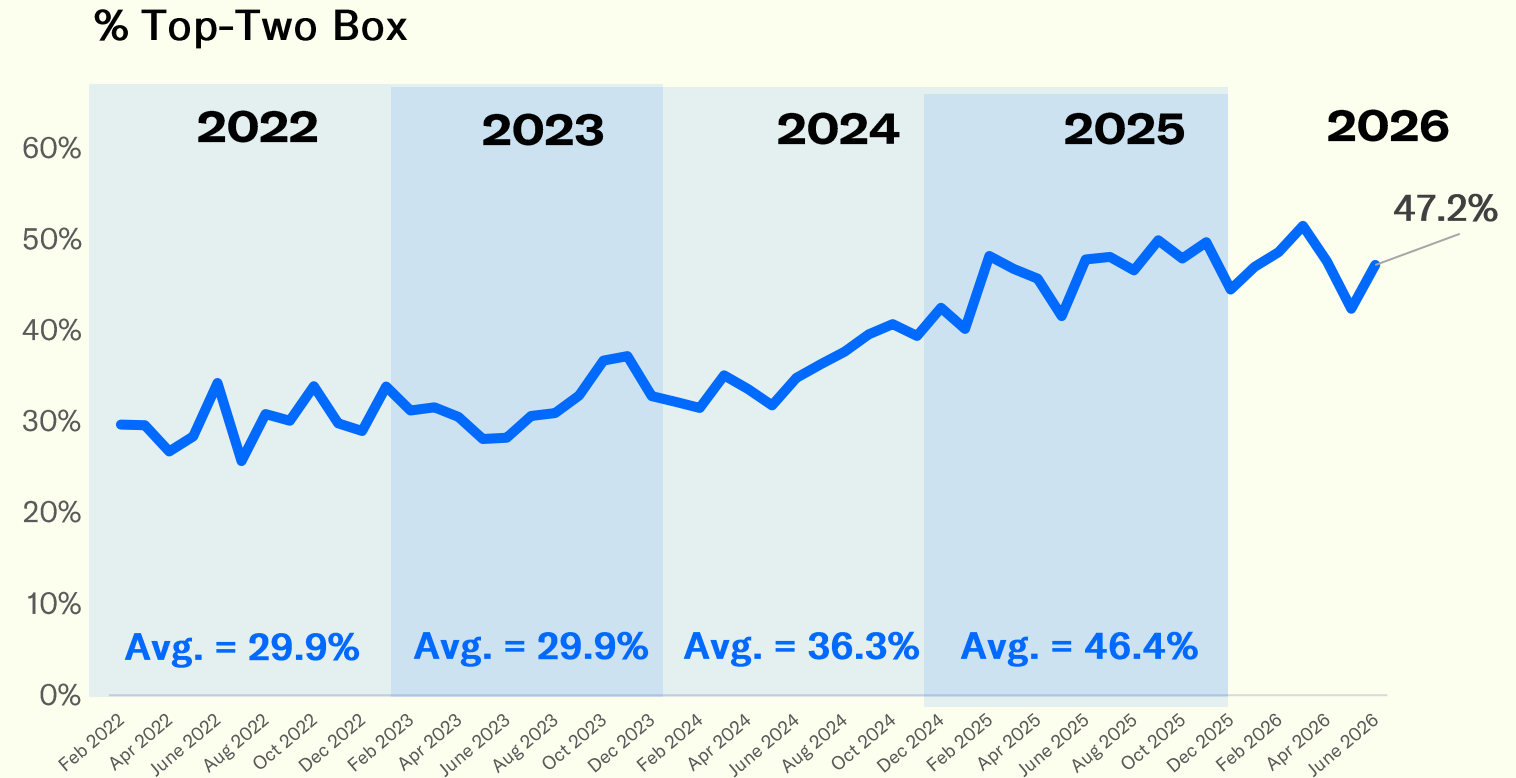
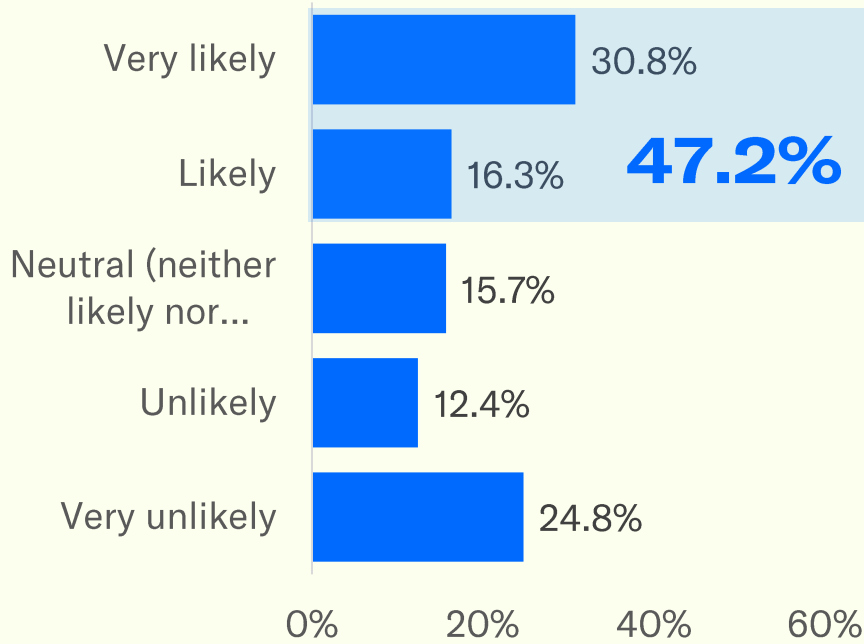
## Question:

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

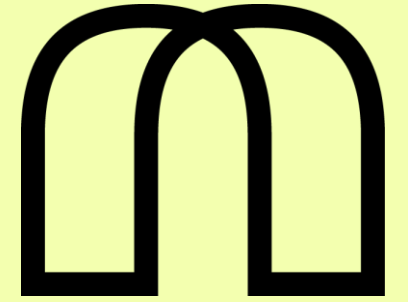


# Americans' Demand for International Travel Rebounds—Now Back Above 2025 Levels

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



We Asked...

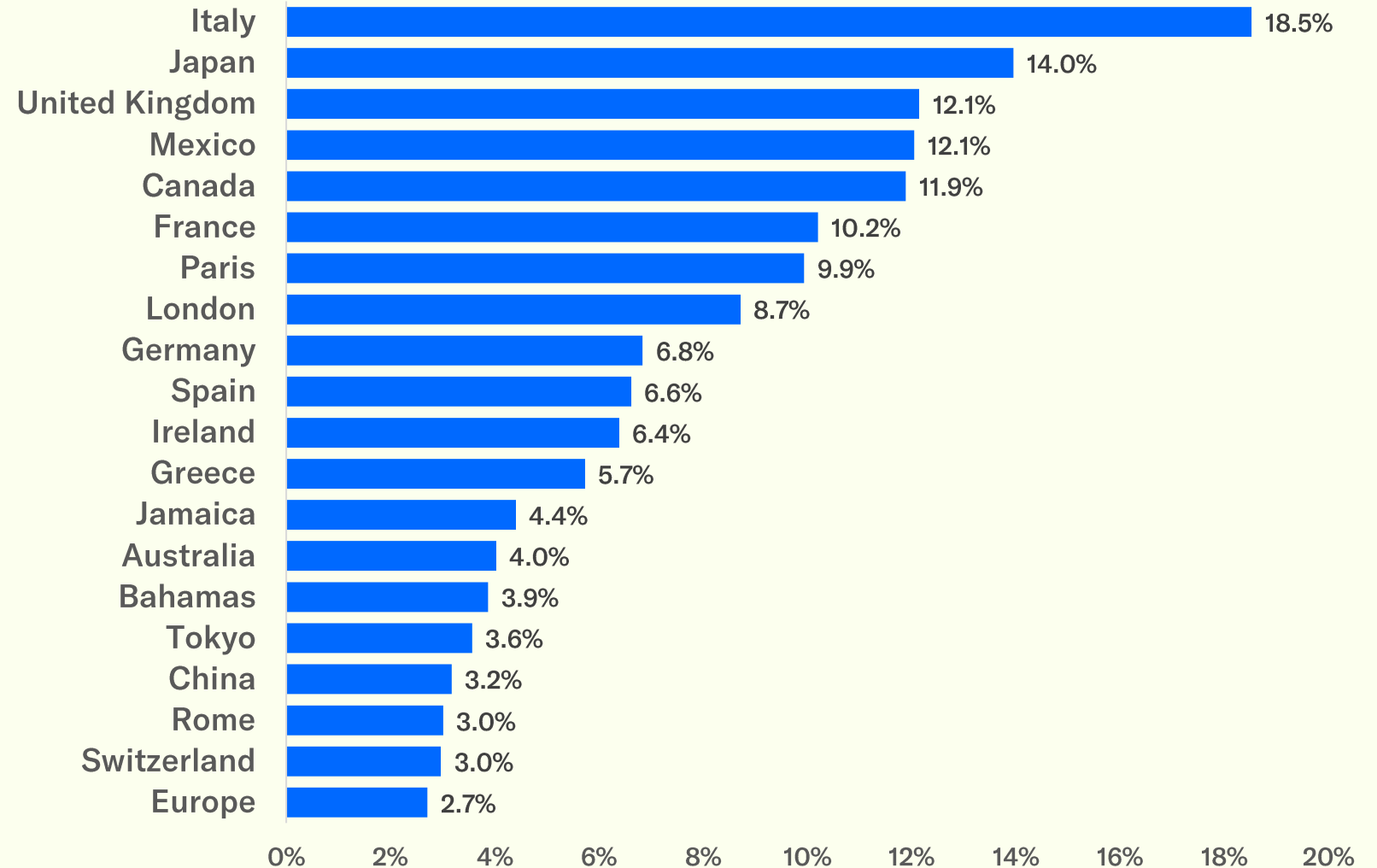


**Which FOREIGN  
DESTINATIONS do you most  
want to visit in the NEXT  
TWELVE (12) MONTHS?  
(Write in up to 5)**

# Italy, Japan, U.K., Mexico, Canada and France Lead

## Question:

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



# Upcoming Major Events Travel

Future Partners

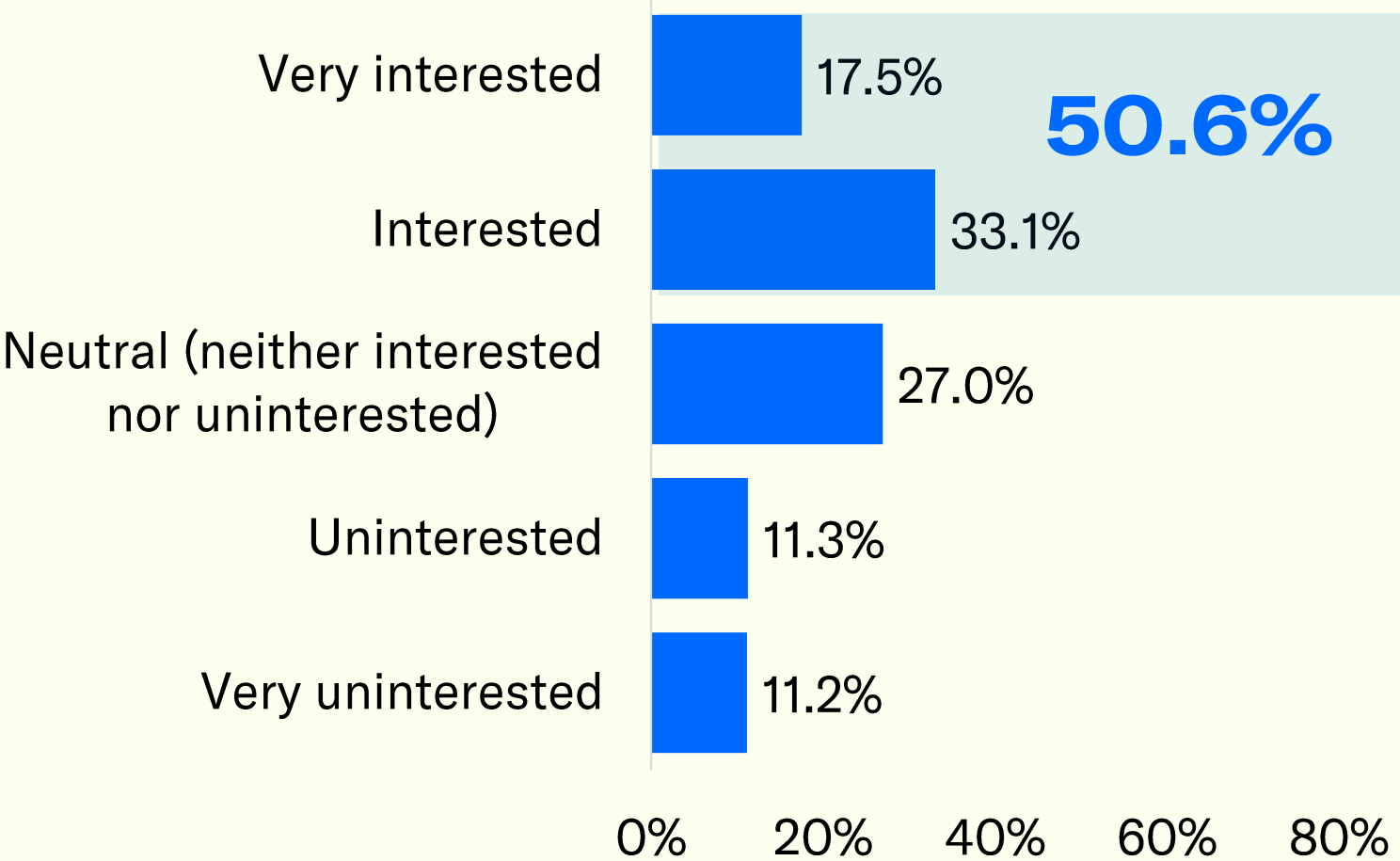


# Interest in Traveling to Attend a Route 66 Anniversary Event

**Question:**

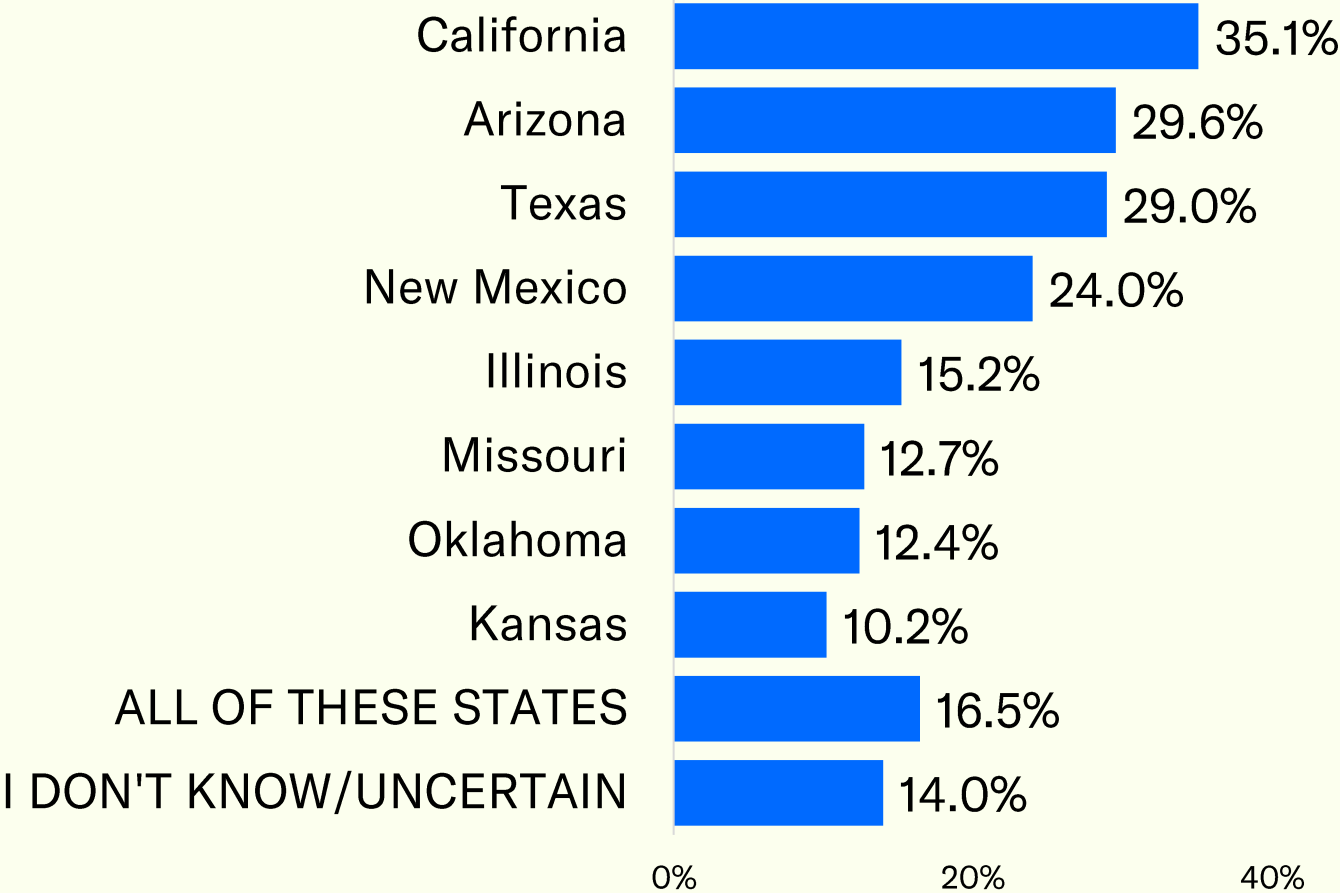
Route 66 is celebrating its centennial anniversary in 2026, marking 100 years since its establishment. Each of the eight states along Route 66 is planning its own celebratory events and activities, including car shows, festivals, and cultural experiences.

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



# Interest in Traveling to a Route 66 Anniversary Destinations

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

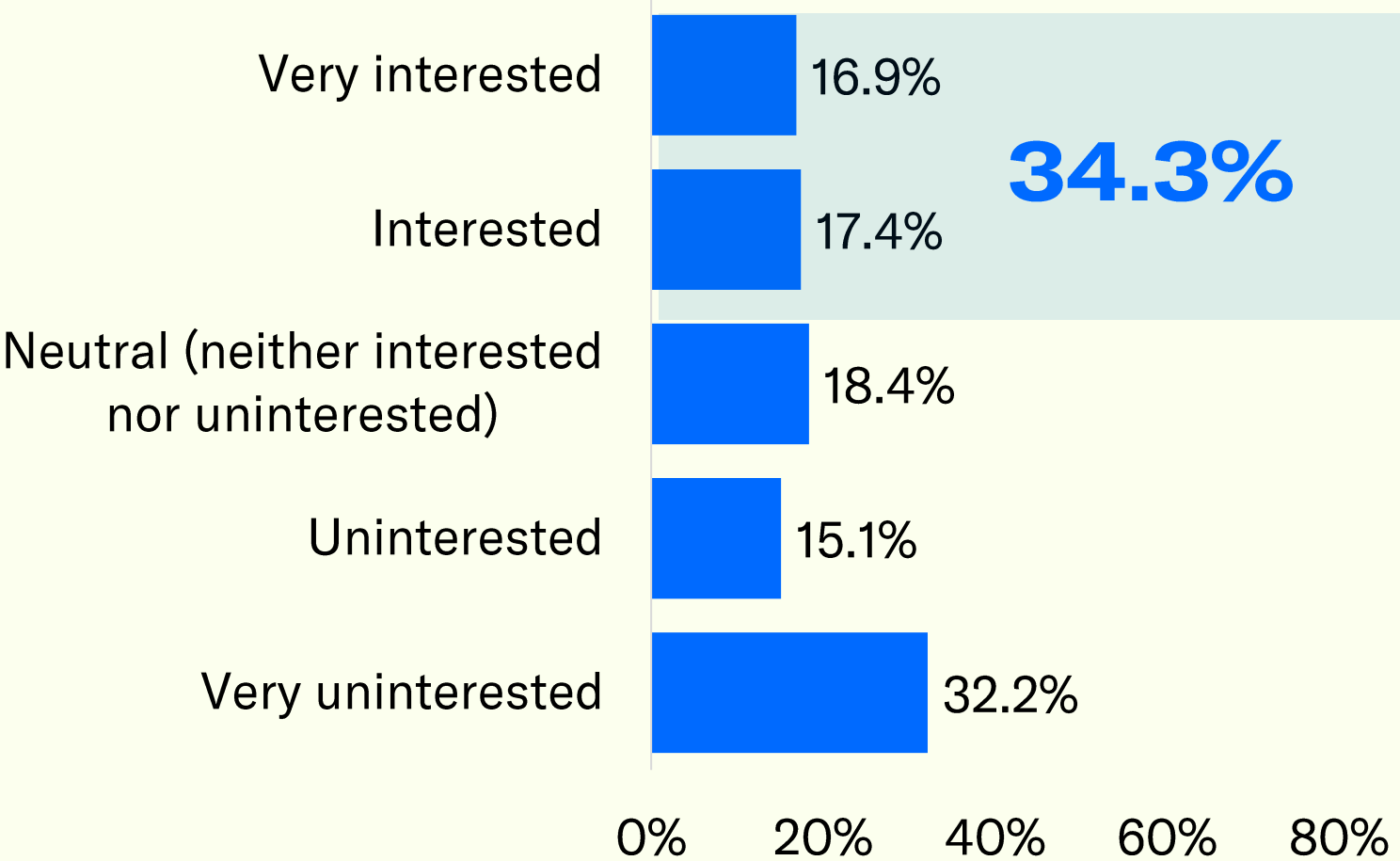


# Interest in Traveling to Attend FIFA World Cup Games and Events

**Question:**

The FIFA World Cup men's soccer championship will be held next year in North America (USA, Mexico and Canada).

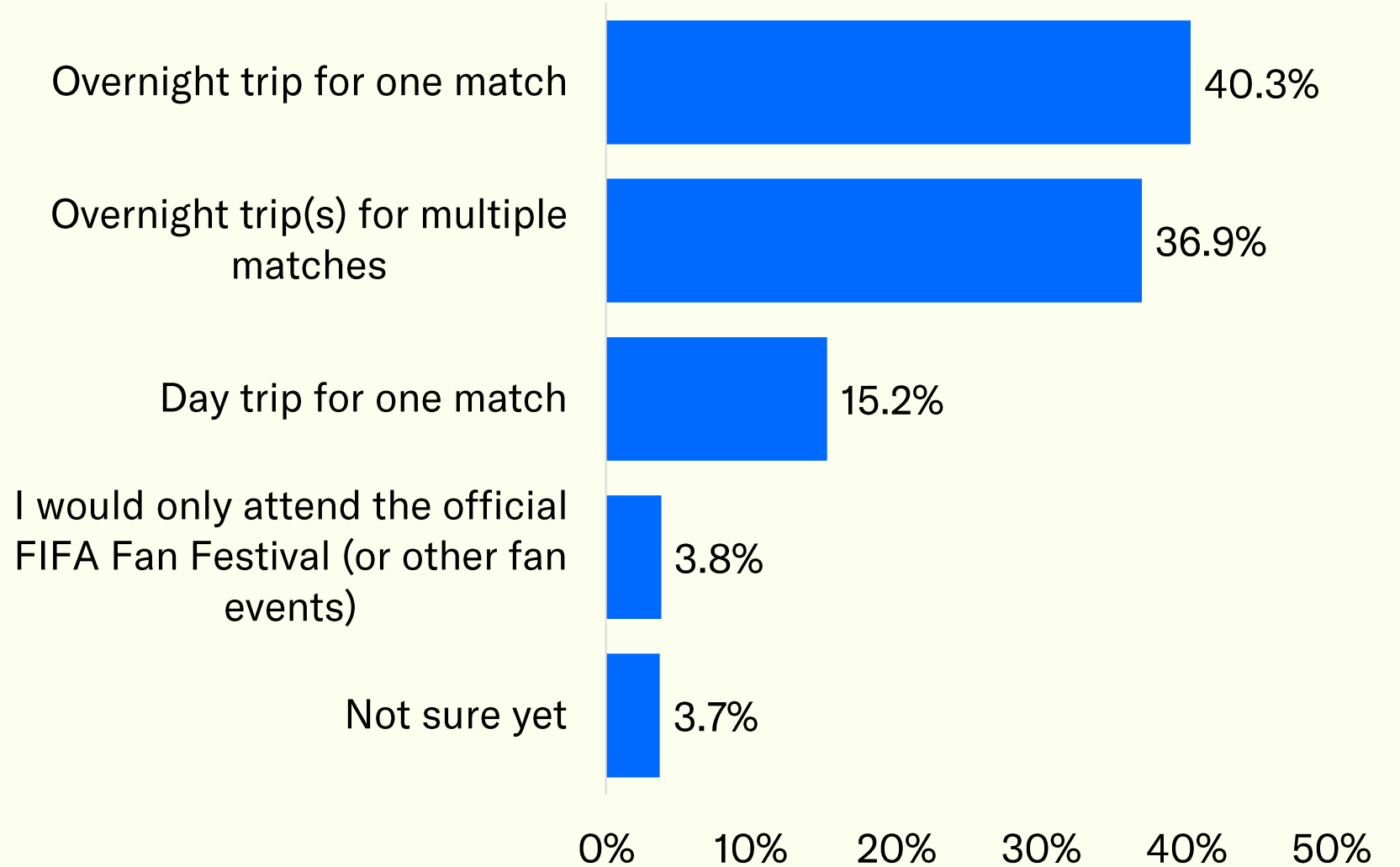
How interested would you be in traveling to experience FIFA World Cup games and events?



# FIFA World Cup Trip Type

## Question:

If you were to attend the 2026 FIFA World Cup in Texas, which of the following best describes how you would plan your trip? (Select one)



# ***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!***



# Canada: The #1 Source of International Tourism to the U.S.

No country sends more visitors to the United States — Canadian travel is a pillar of the U.S. tourism economy.

**20.4M**  
international visits in 2024 — more than any other country

**\$20.5B**  
spent across the U.S. travel economy

**140,000**  
American jobs supported

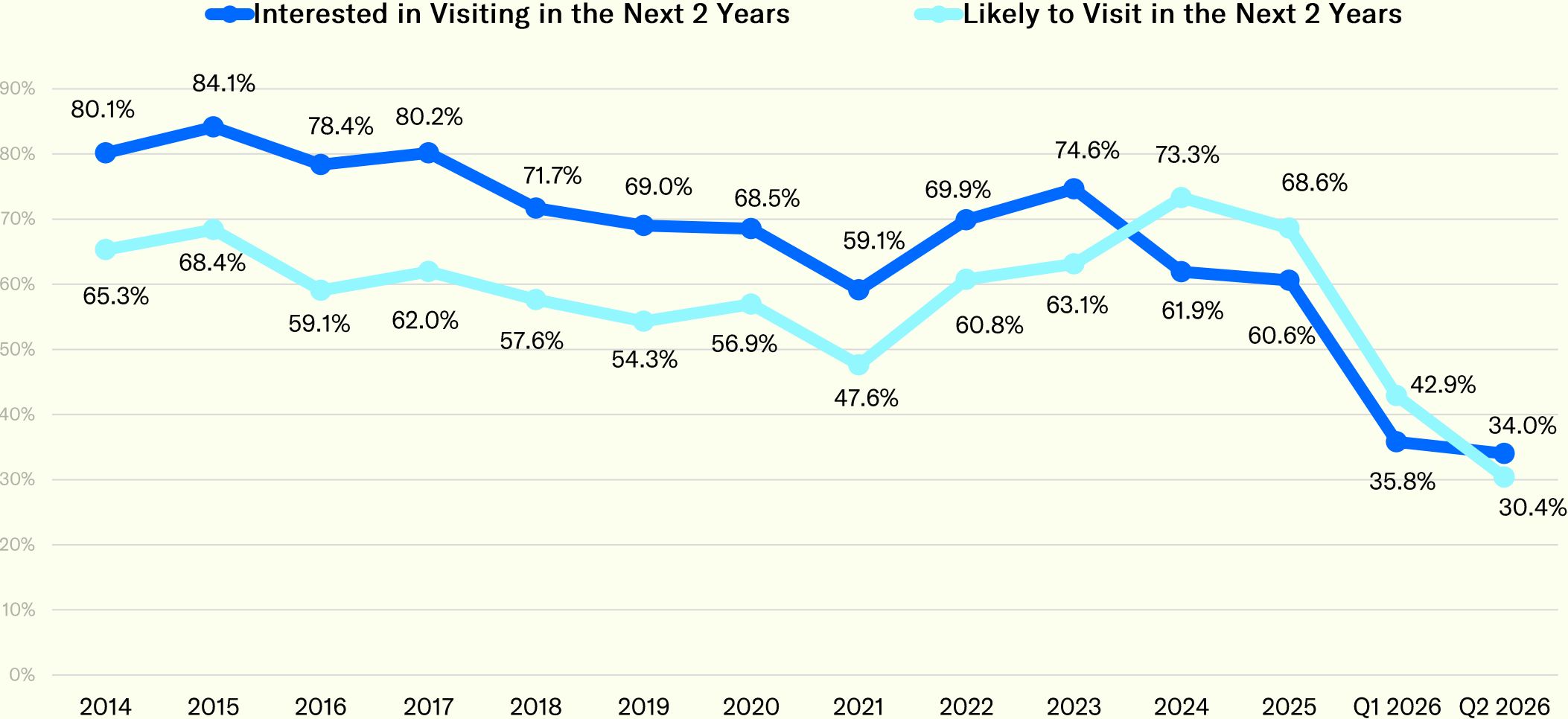
The stakes: even a 10% drop in Canadian travel would cost the U.S.

<b>2.0M</b> fewer visits	<b>\$2.1B</b> lost visitor spending	<b>14,000</b> American jobs lost
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### Top destination states for Canadian visitors

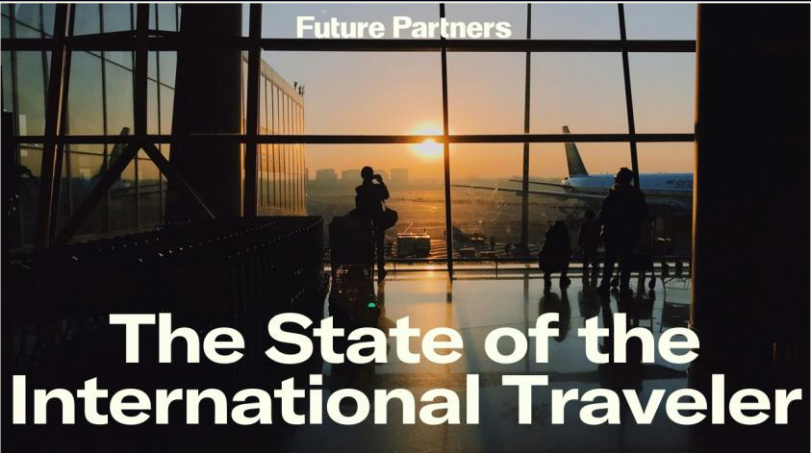
- Florida
- California
- Nevada
- New York
- Texas

# Canadian Travelers' Sentiment towards the U.S.A—Interest and Likelihood to Visit Remain Significantly Depressed



# Future Partners' Data + Insights Meets the Power of AI

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



Future Partners 8:30 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 Travel Industry's Insights Agent

This block contains a screenshot of the 'SATS AI Insights Explorer' interface on the left and the text 'The Travel Industry's Insights Agent' on the right. The interface shows a dark background with a central graphic of three vertical bars and some small text at the bottom. The text on the right is in a serif font.

# Let's keep the conversation going



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Livestream Calendar