

A person with long blonde hair, wearing a red jacket, a grey beanie, and a blue skirt, stands on a grassy hill. They are holding a camera up to their eye, taking a photo. The background is a dense forest of green trees. The foreground is covered in dry, yellowish grass.

Future Partners

The State of the American Traveler

September 2026

Opportunity powered by *Insight*

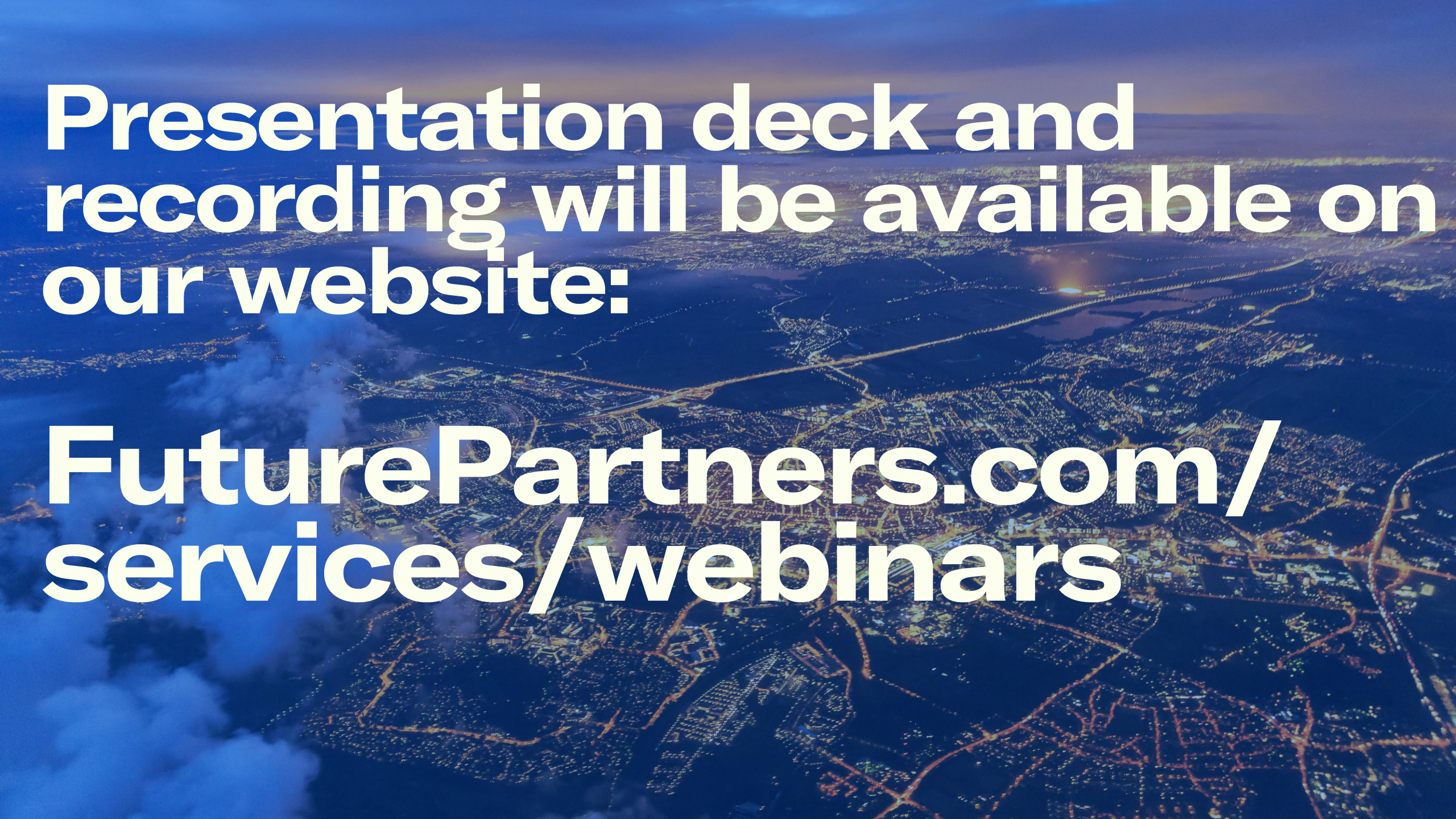
Future Partners

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

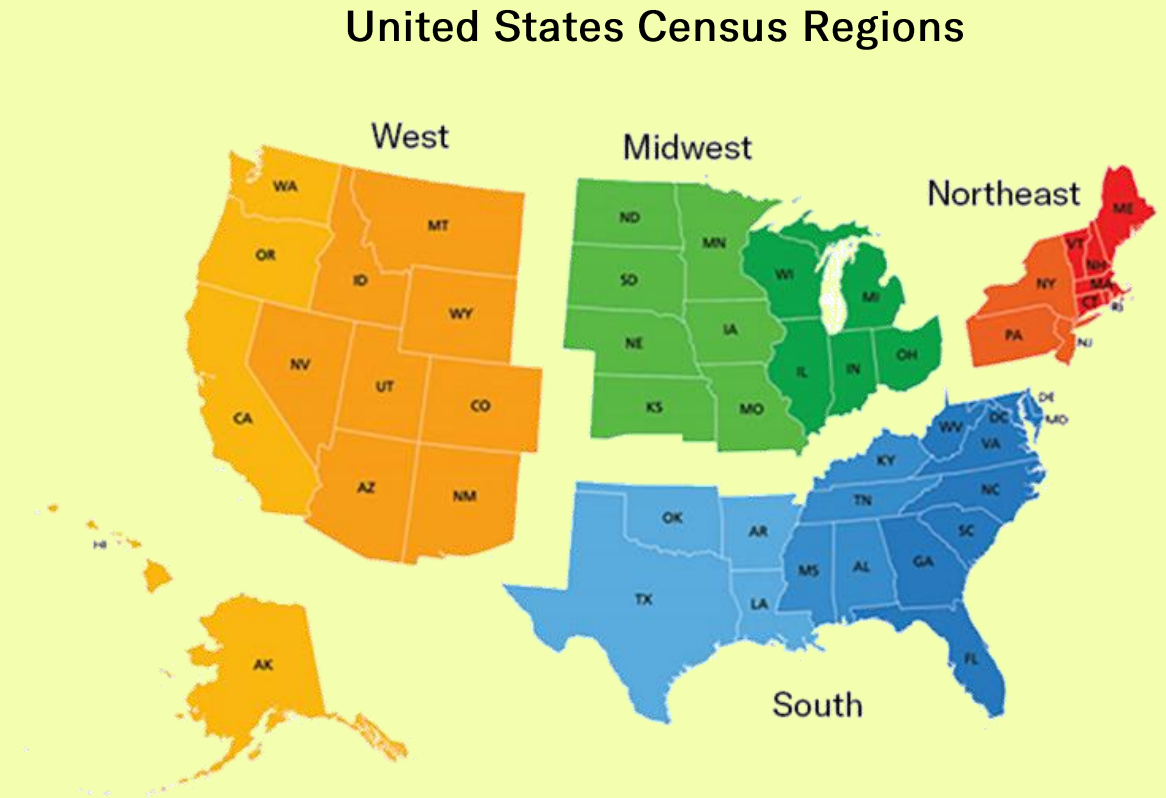
An aerial night photograph of a city, likely San Francisco, showing the Golden Gate Bridge and surrounding urban areas with lights reflecting on the water. The image is overlaid with a blue gradient.

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

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

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: [August 17 – 23](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region





Americans' Current Travel Sentiment

Recession expectations turned back up after two calmer months and financial optimism softened, yet trip-taking rose again and the forward calendar refilled.

The more consequential shifts for travel marketers sit in how travelers decide: impulse trips have climbed to a series high, AI-assisted planning keeps setting records, social platforms are at their highest levels yet as research tools, and buy-now-pay-later is becoming a mainstream way younger households pay for travel.

Financial Snapshot

Better off than a year ago

32.8% ↓

Down from 34.0% last month and 33.1% in August 2025

Expect to be better off in a year

45.0% ↓

Down from 46.1% last month, below 47.1% a year ago

Expect a recession within 6 months

46.6% ↑

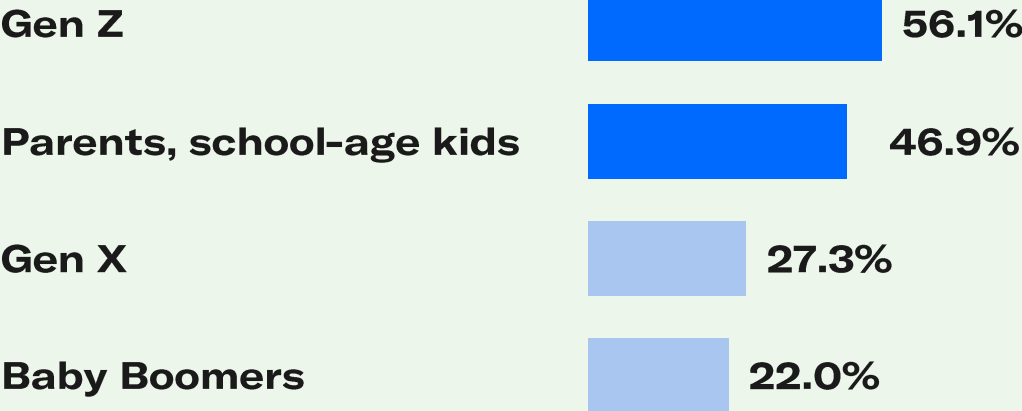
Up from 43.8% last month, in line with 46.2% a year ago

Being careful with money

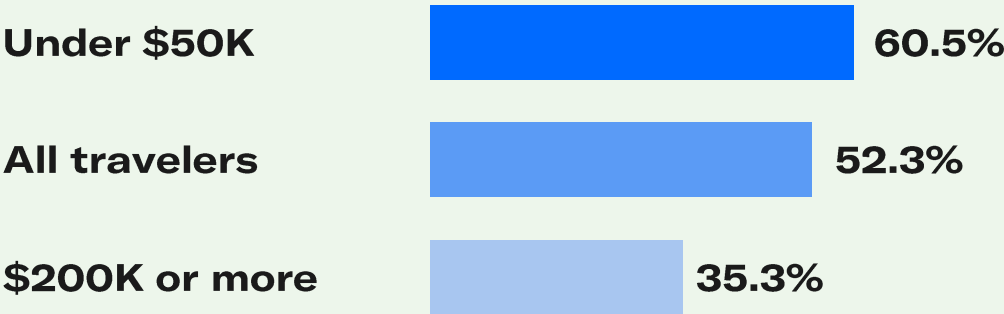
52.3% ↑

Up from 50.6% last month and 46.4% a year ago

Better off than a year ago, by segment



Watching spending on recession concerns, by income



A greater proportion of Americans say now is a good time to spend on travel than say it's not

Question:

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

Yes - It is a very good time

9.1%

34.7%

Yes - It is a good time

25.6%

It is neither a good time nor
bad time

38.7%

No - It is a bad time

19.2%

No - It is a very bad time

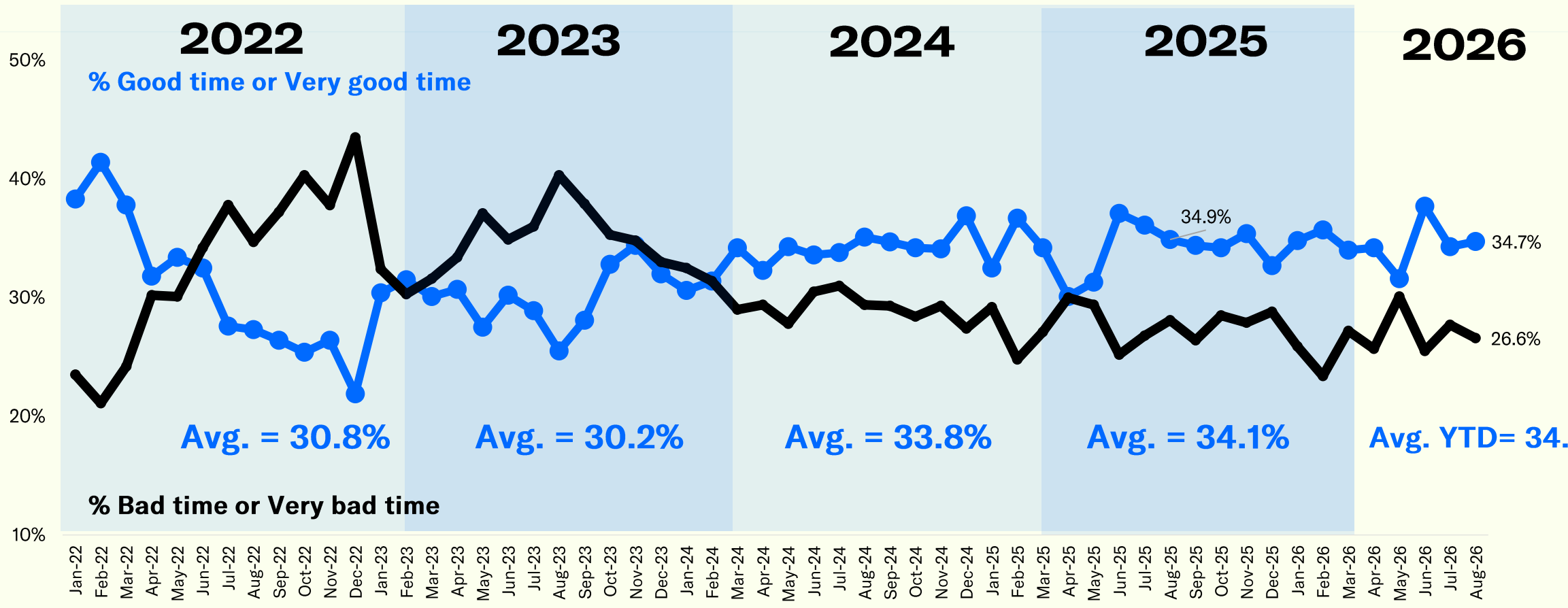
7.4%

26.6%

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

A greater proportion of Americans say now is a good time to spend on travel than say it's not

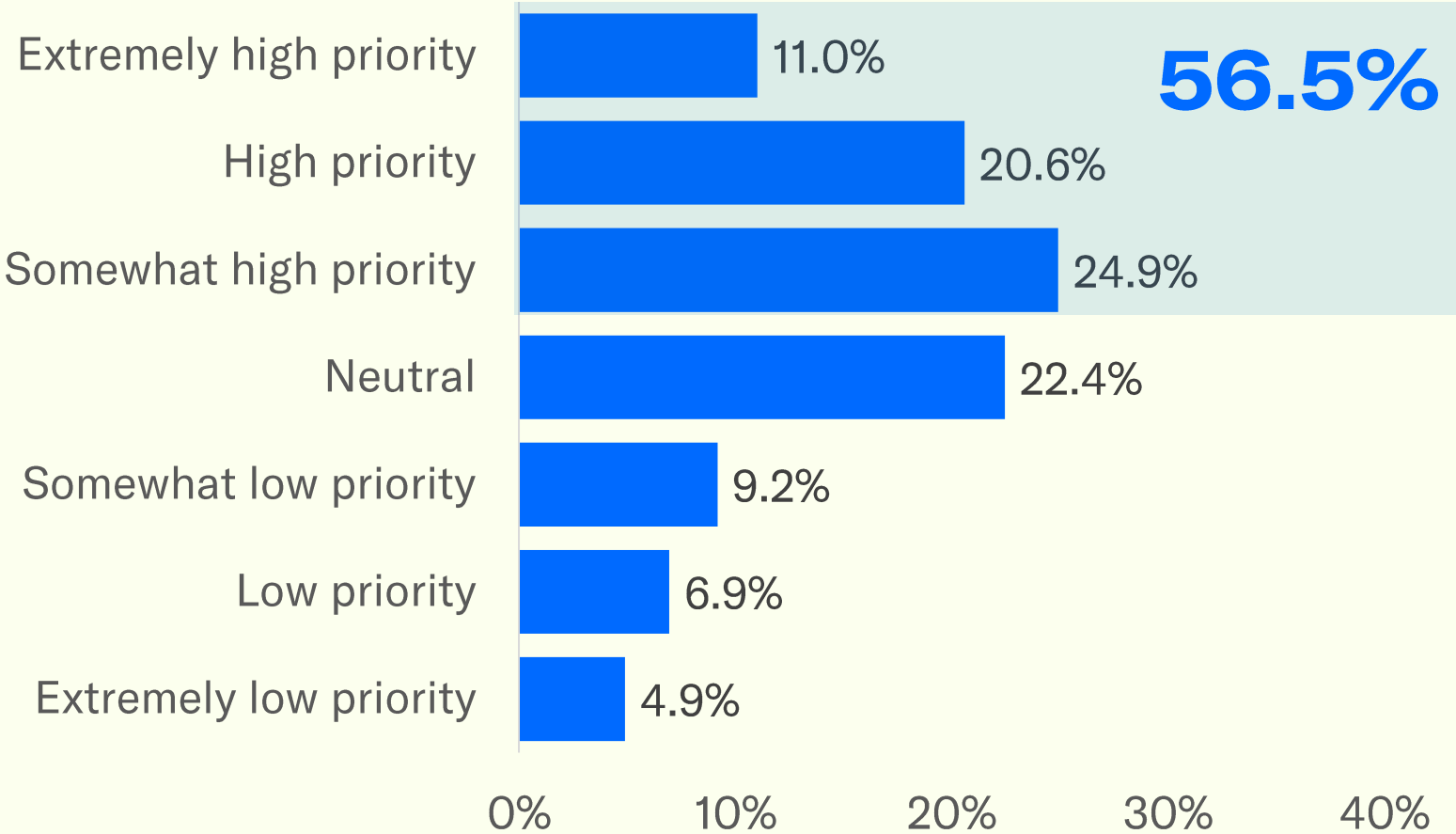
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



A majority say leisure travel spending will be a high-budget priority

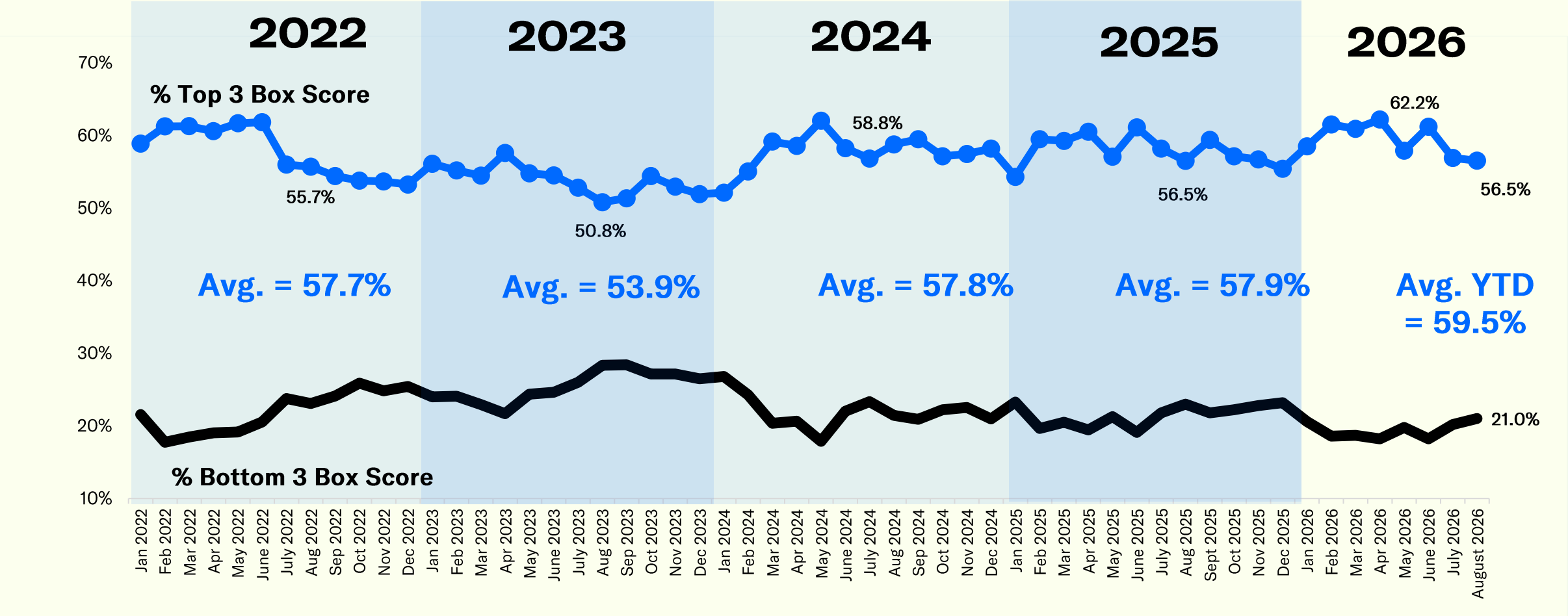
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a(n)
_____.



Travel spending prioritization is in decline

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.

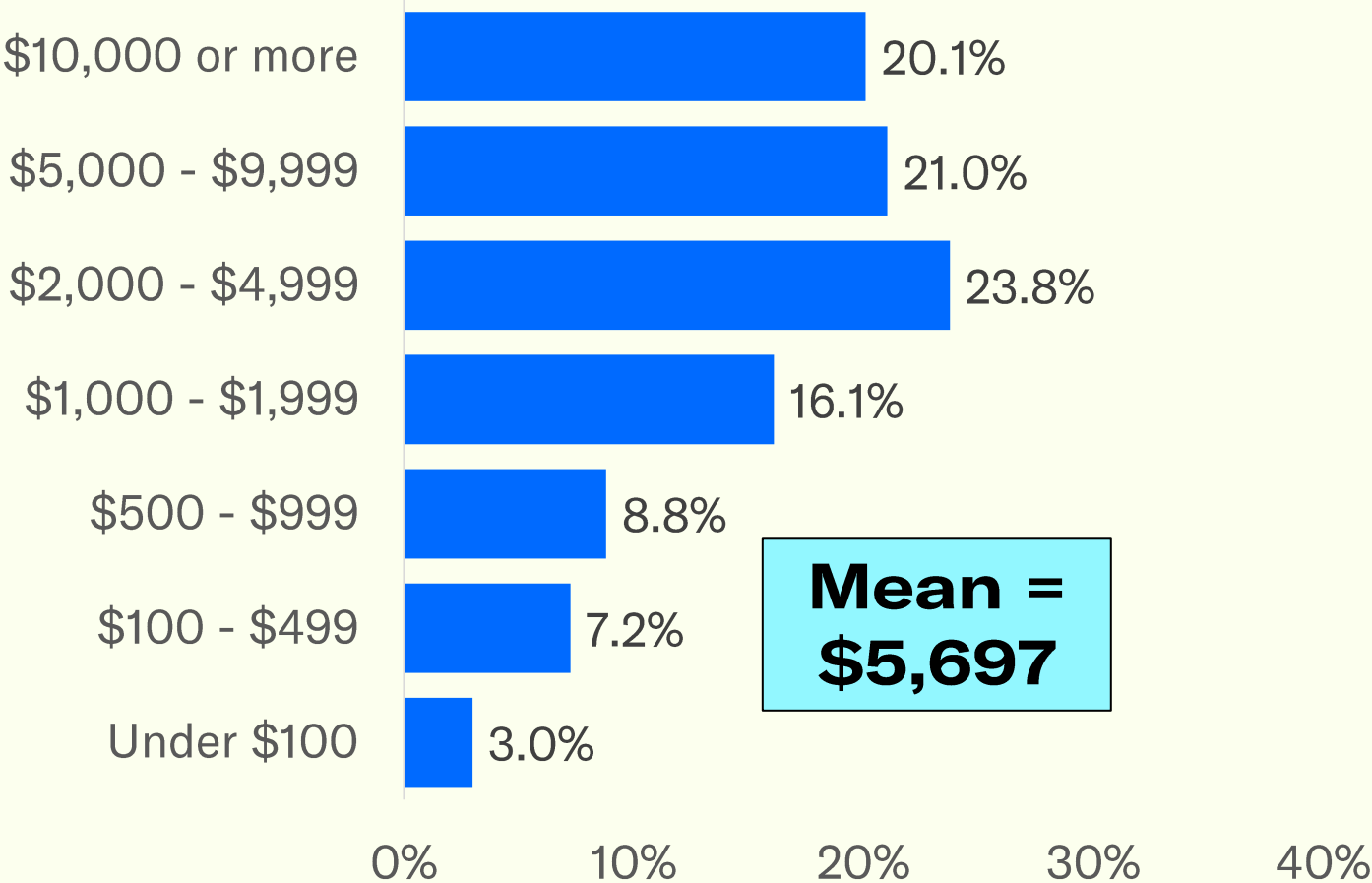


The average American traveler is reporting \$5,340 for their annual travel budget

Question:

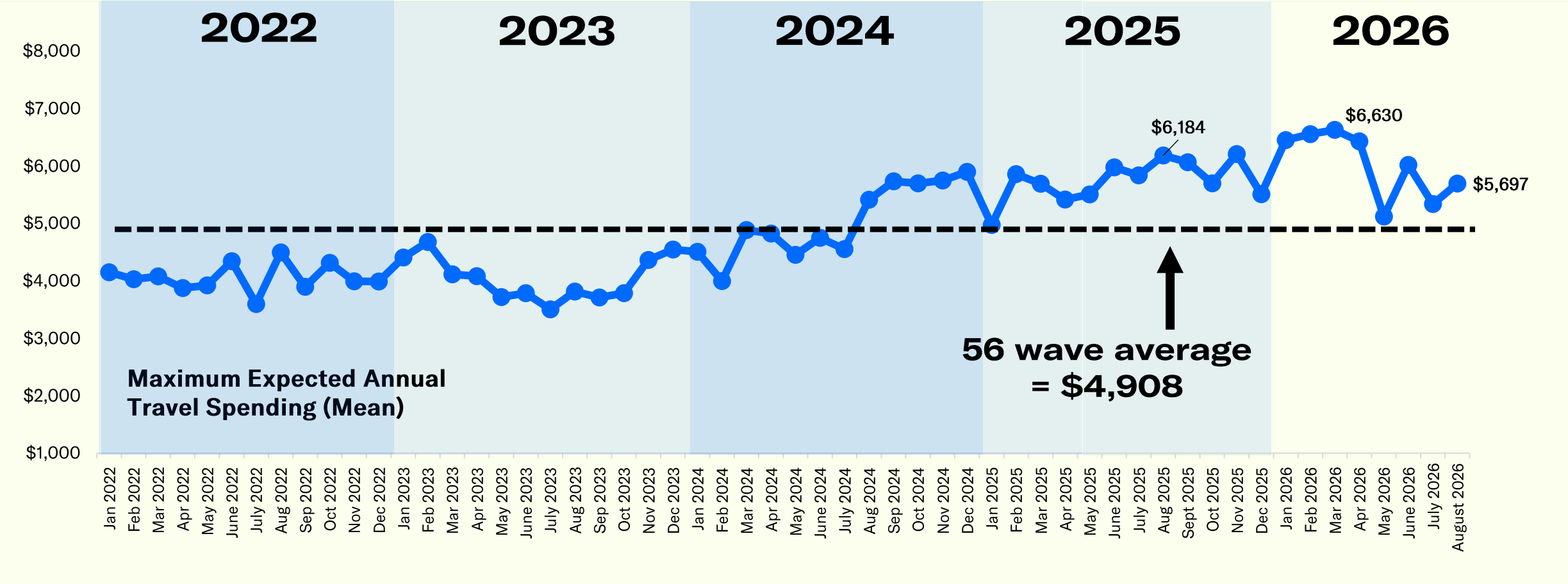
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

Maximum I would spend on leisure travel (next 12 months): _____



Americans' travel budgets have improved

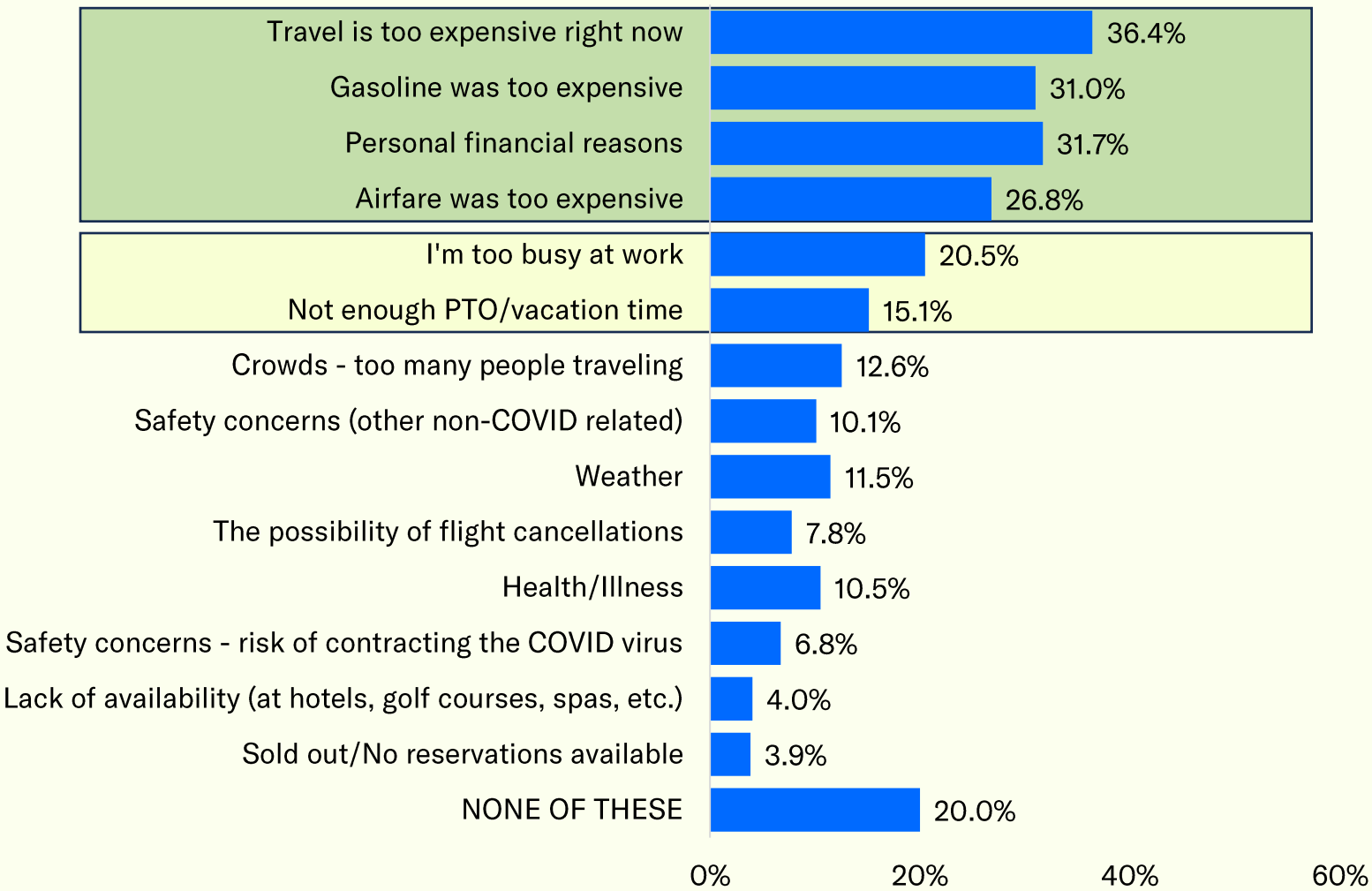
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Deterrents to Traveling in the Past 6 Months

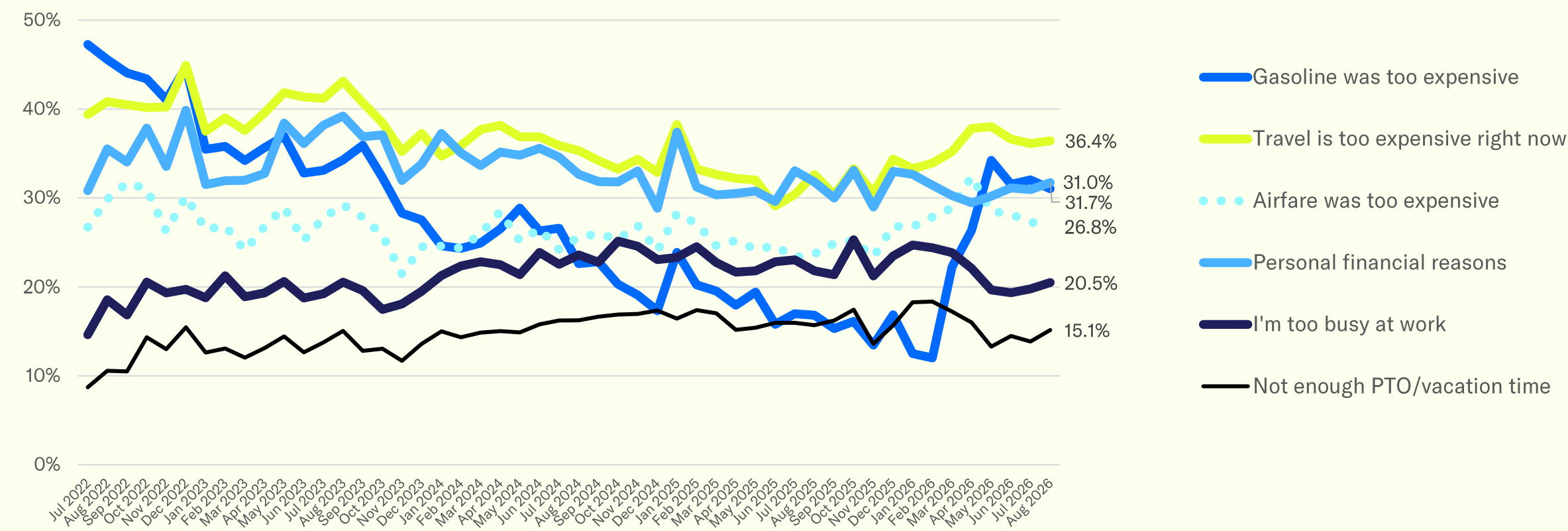
Question:

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)



Barriers that once competed with cost (not enough PTO/busy at work) are fading into the background.

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)

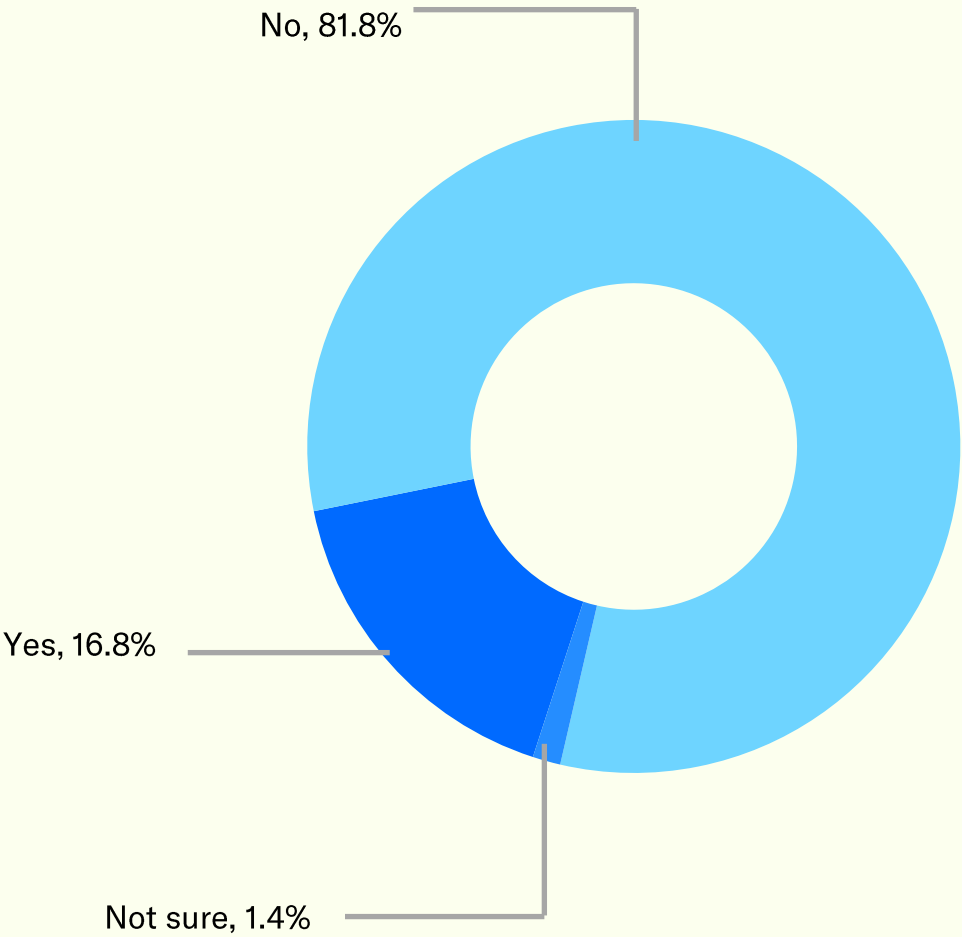


Buy Now, Pay Later (BNPL) Usage

Question:

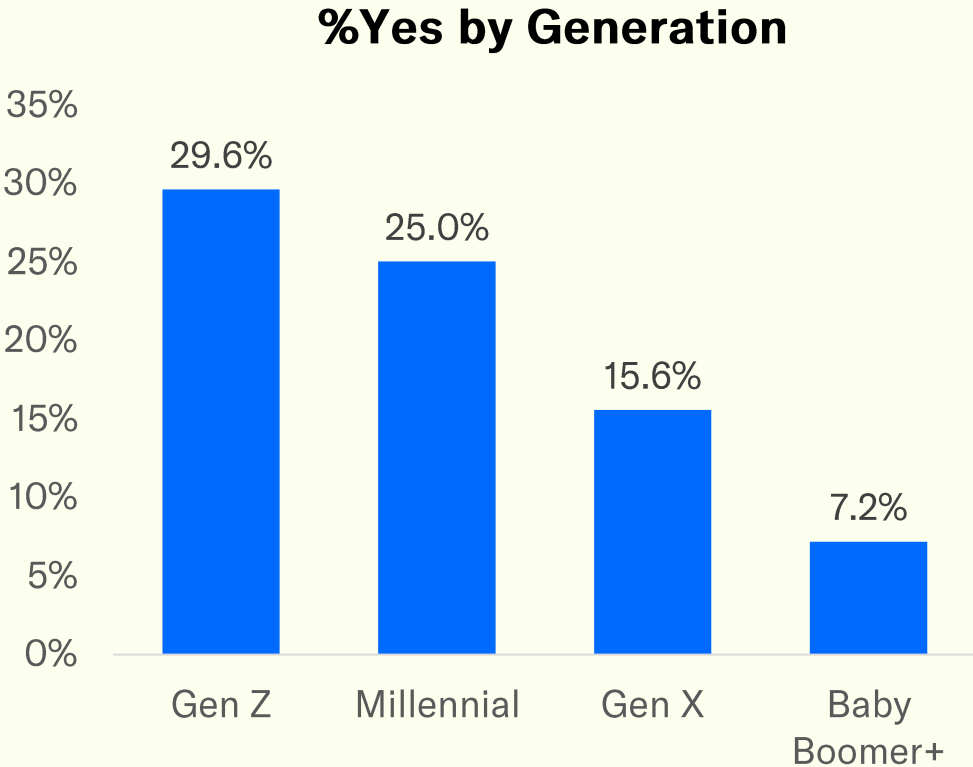
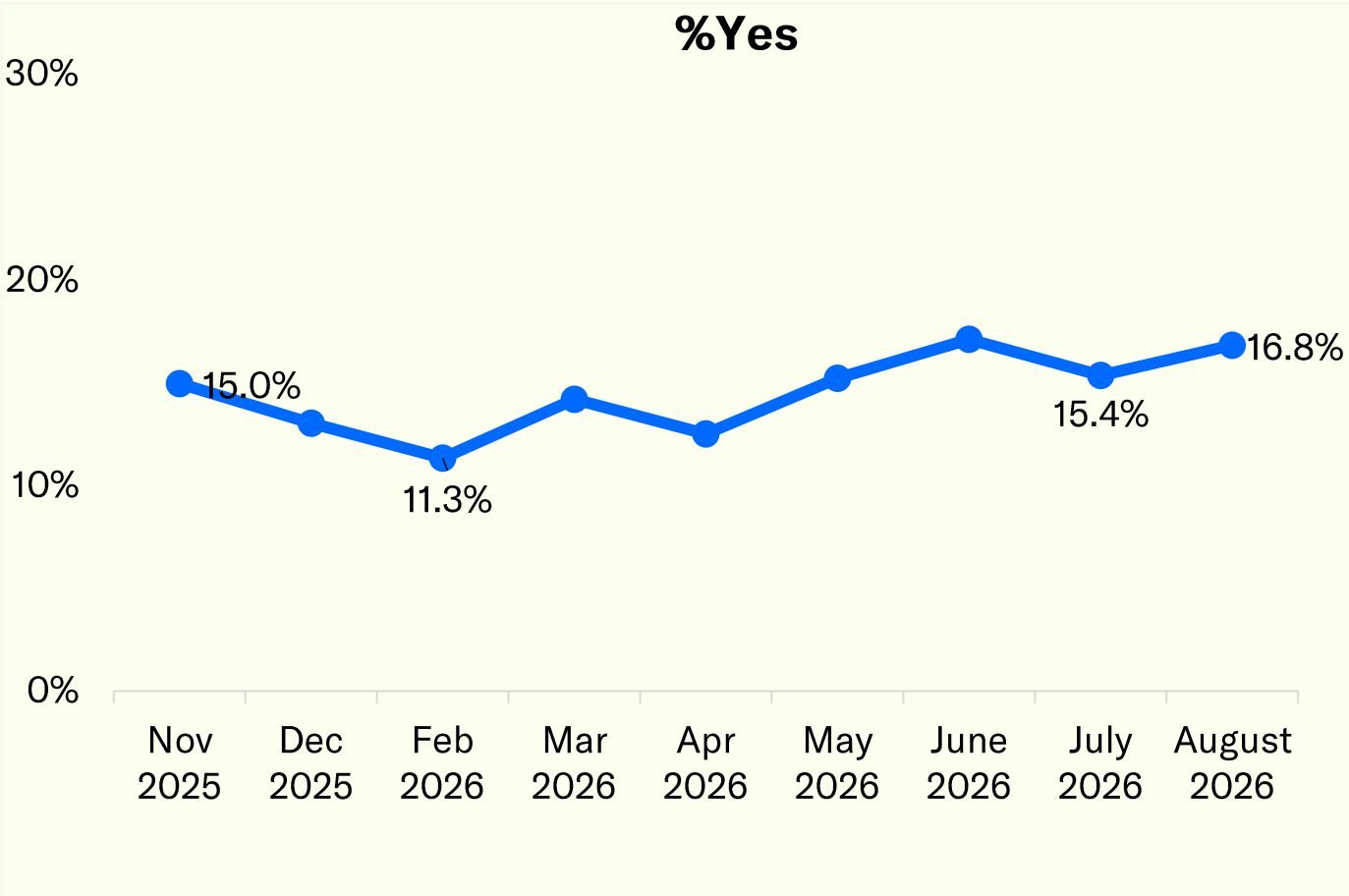
"Buy Now, Pay Later" (BNPL) payment plans allow travelers to book and pay for their trips over time instead of paying the full cost upfront. Unlike traditional credit cards, BNPL plans are usually offered by online travel agencies, airlines, hotels using third-party finance companies (e.g., Affirm, Klarna and Afterpay) and are designed for one-time purchases rather than as a source of ongoing credit.

IN THE PAST 12 MONTHS have you used a "Buy Now, Pay Later" payment plan for any of your travel?



Buy-now-pay-later use for travel purchases is trending up.

Question: IN THE PAST 12 MONTHS have you used a "Buy Now, Pay Later" payment plan for any of your travel?



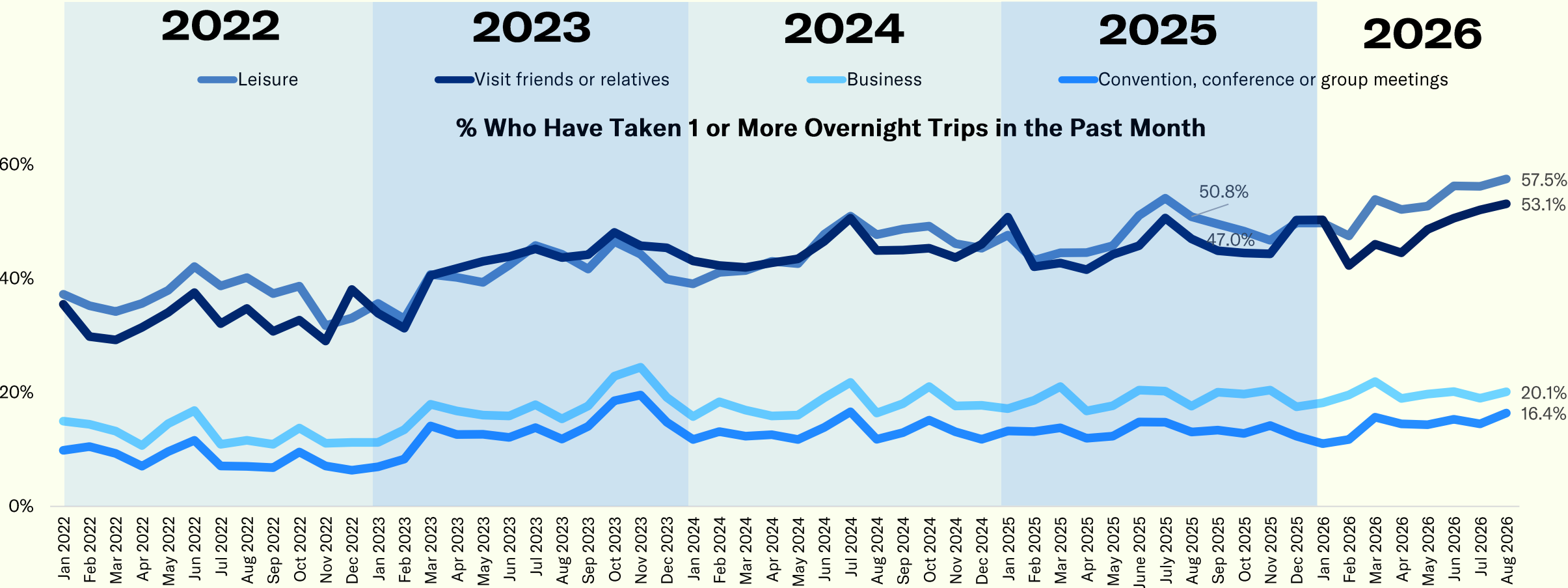
Friction to travel is real and growing, but increasingly of a specific kind — a household budget line rather than a calendar conflict — which favors destination messaging built around value, proximity, and payment flexibility.



Recent Trips & Forward Booking Calendar

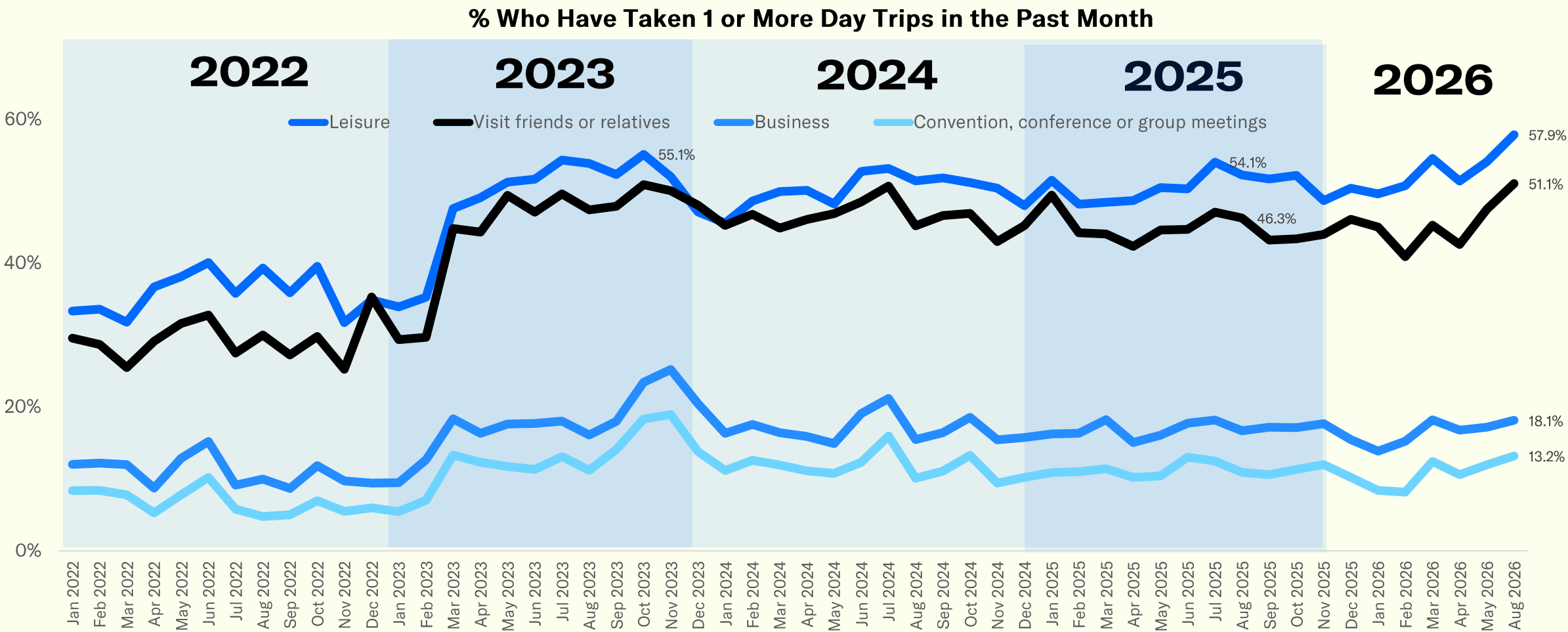
Overnight trips taken in the past month for leisure and for VFRs outpaces 2025 levels

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



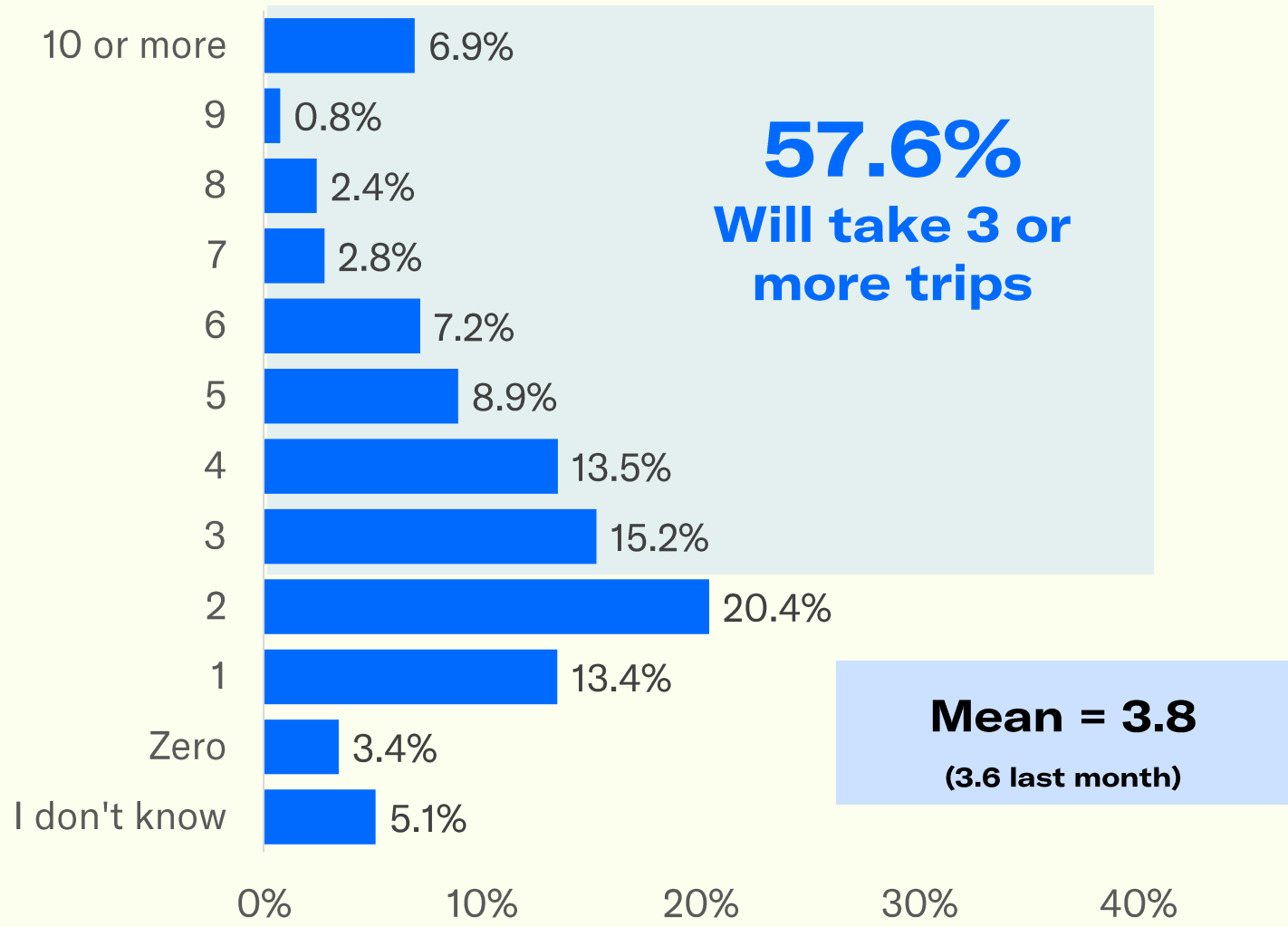
Leisure day trips taken in the past month reach a record high

Question: How many DAY TRIPS (i.e., no overnight stay) of each type have you taken in the PAST MONTH?



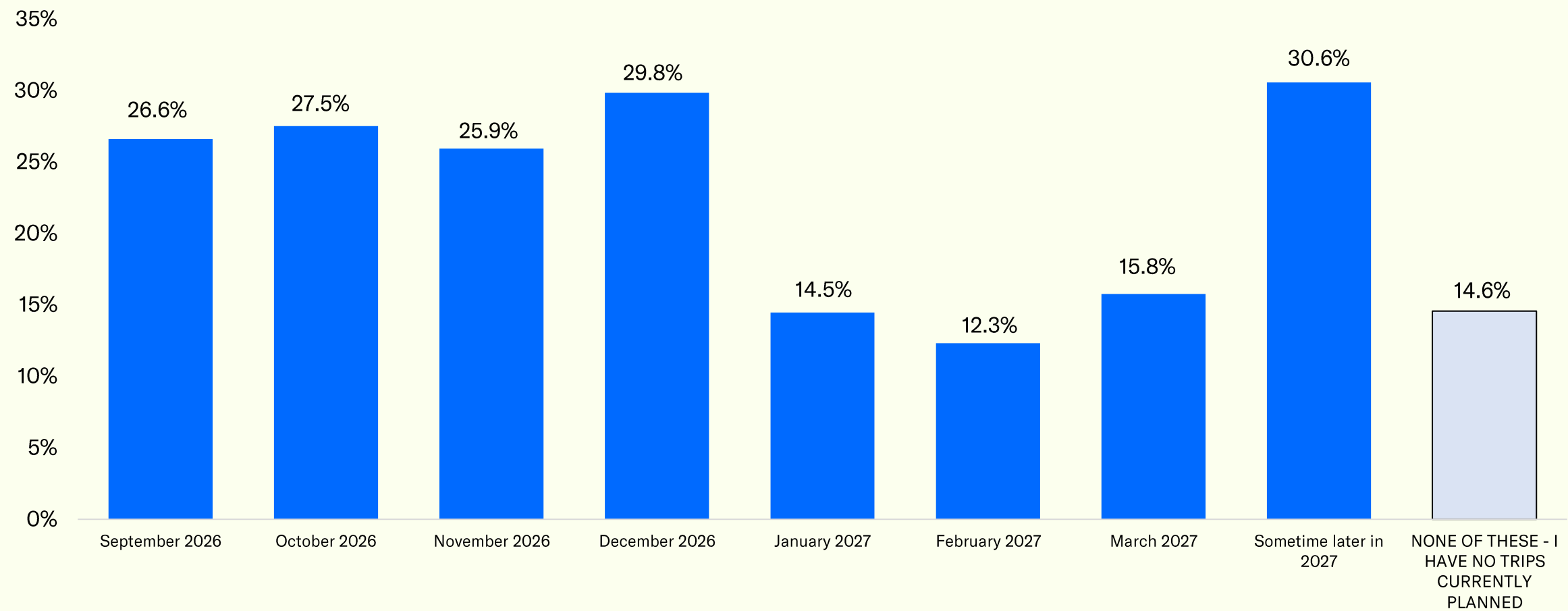
Trip volume expectations for the next 12 months rebounded

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)



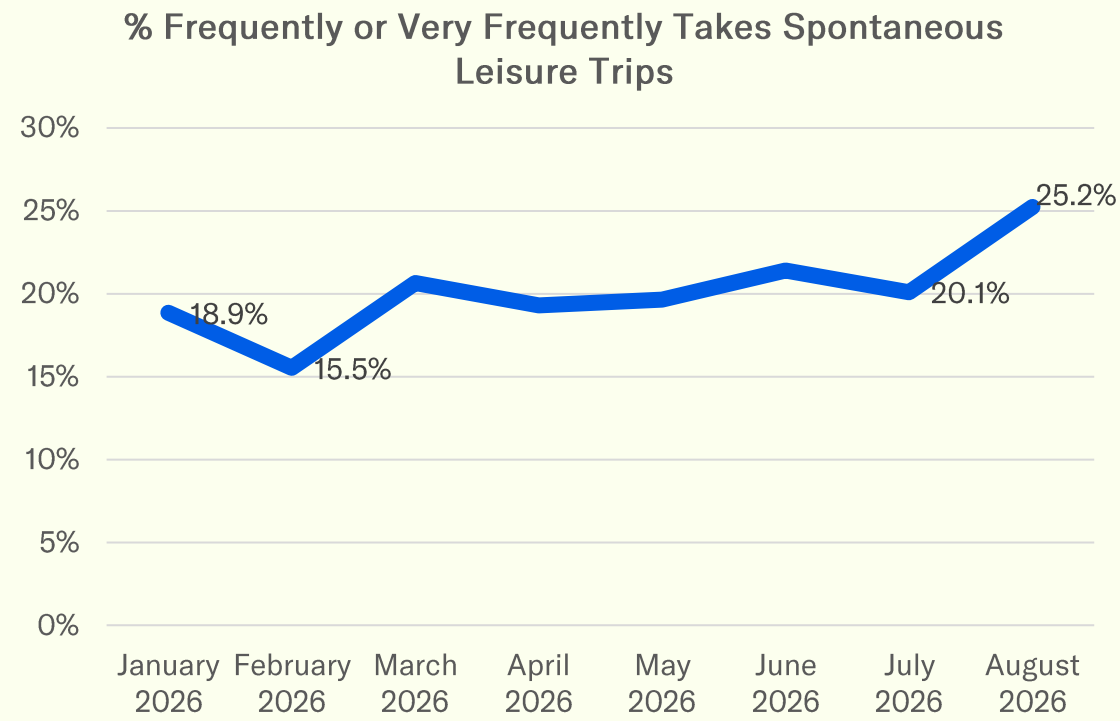
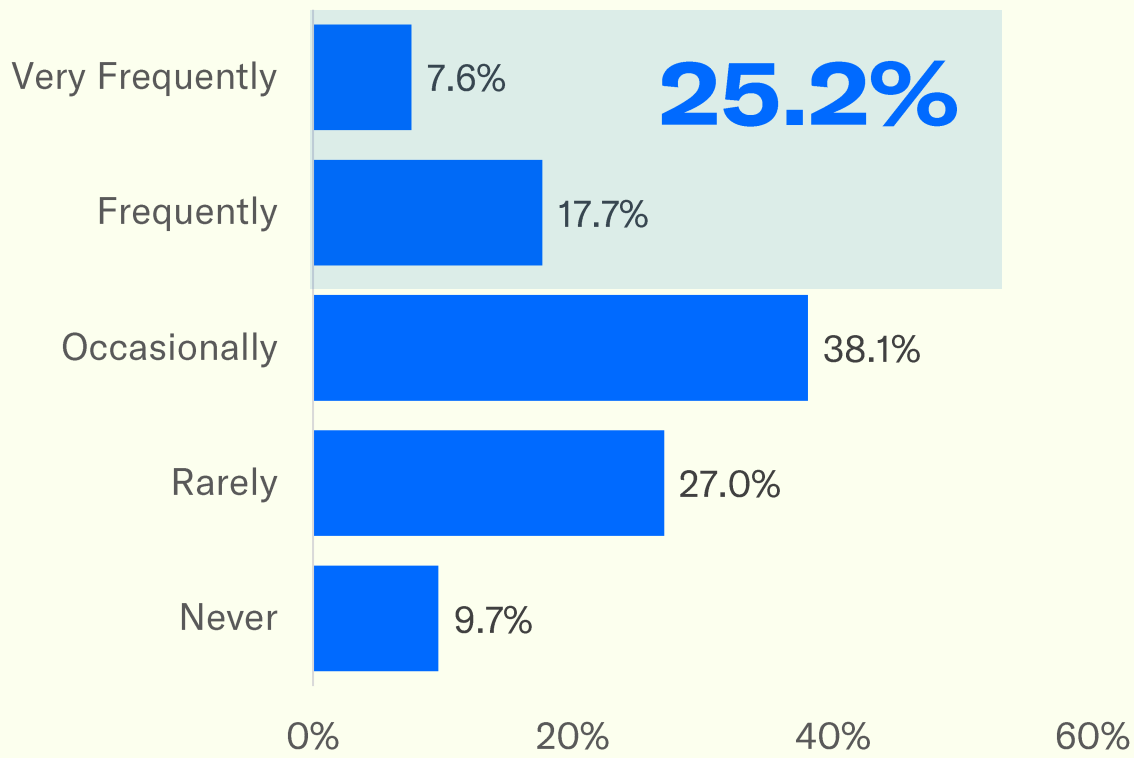
Expectations to travel in December are especially high

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



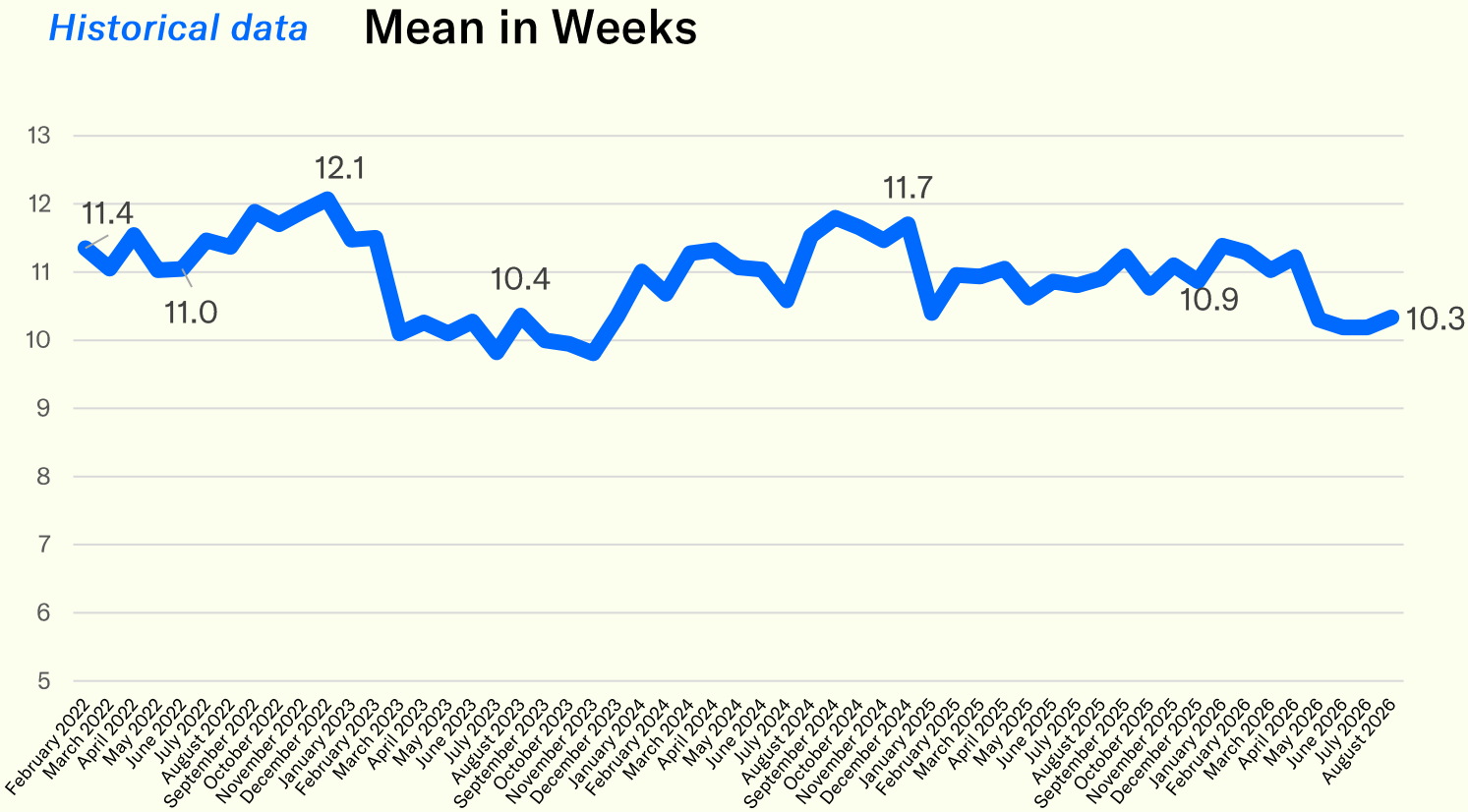
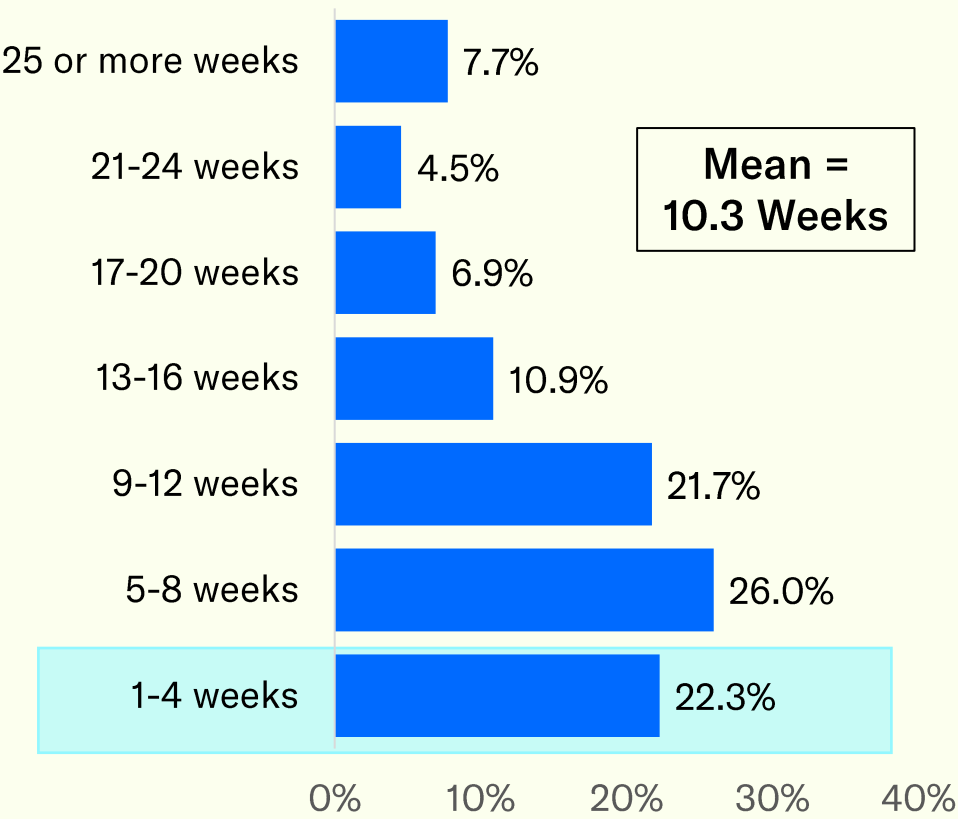
American travelers are traveling on impulse in growing numbers.

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



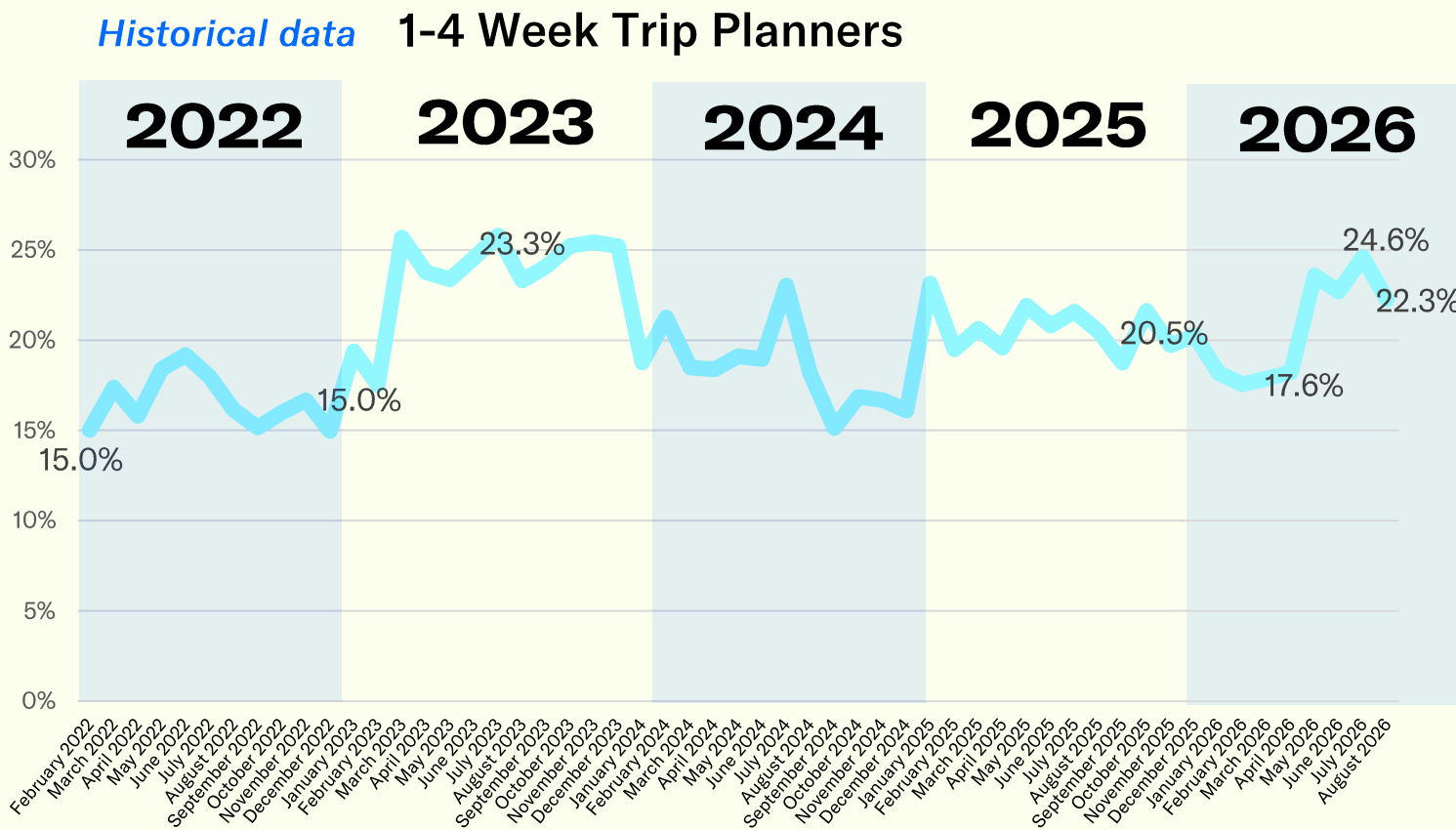
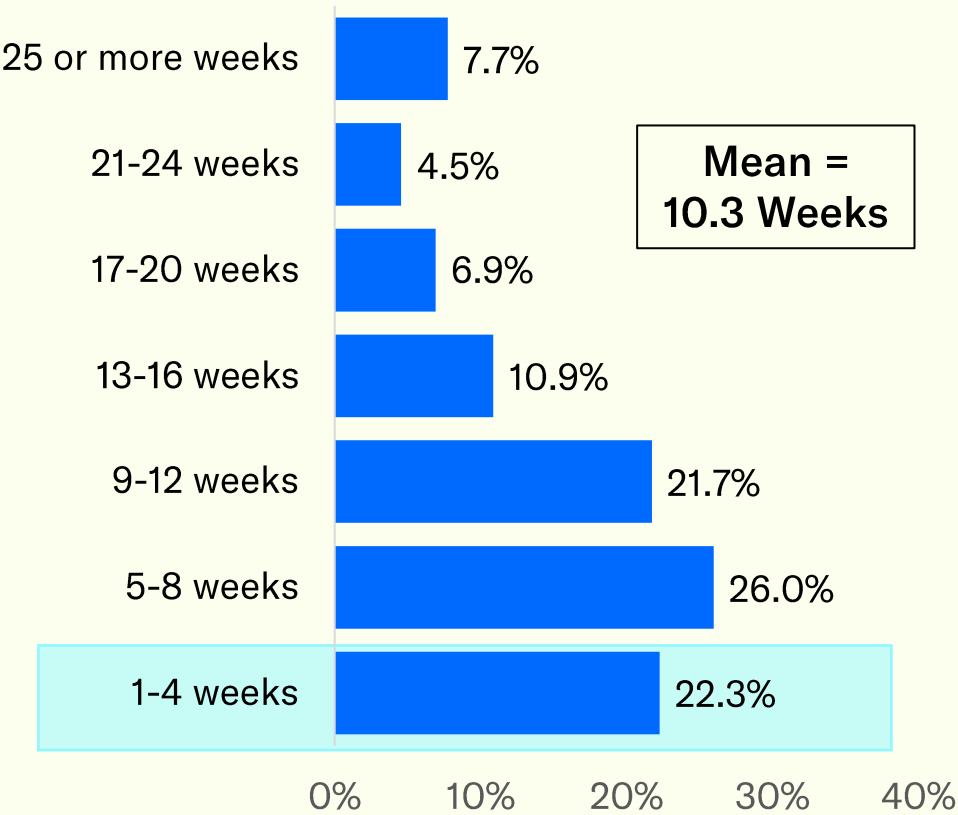
Planning window for domestic leisure travel is down from earlier this year to 10.3 weeks.

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



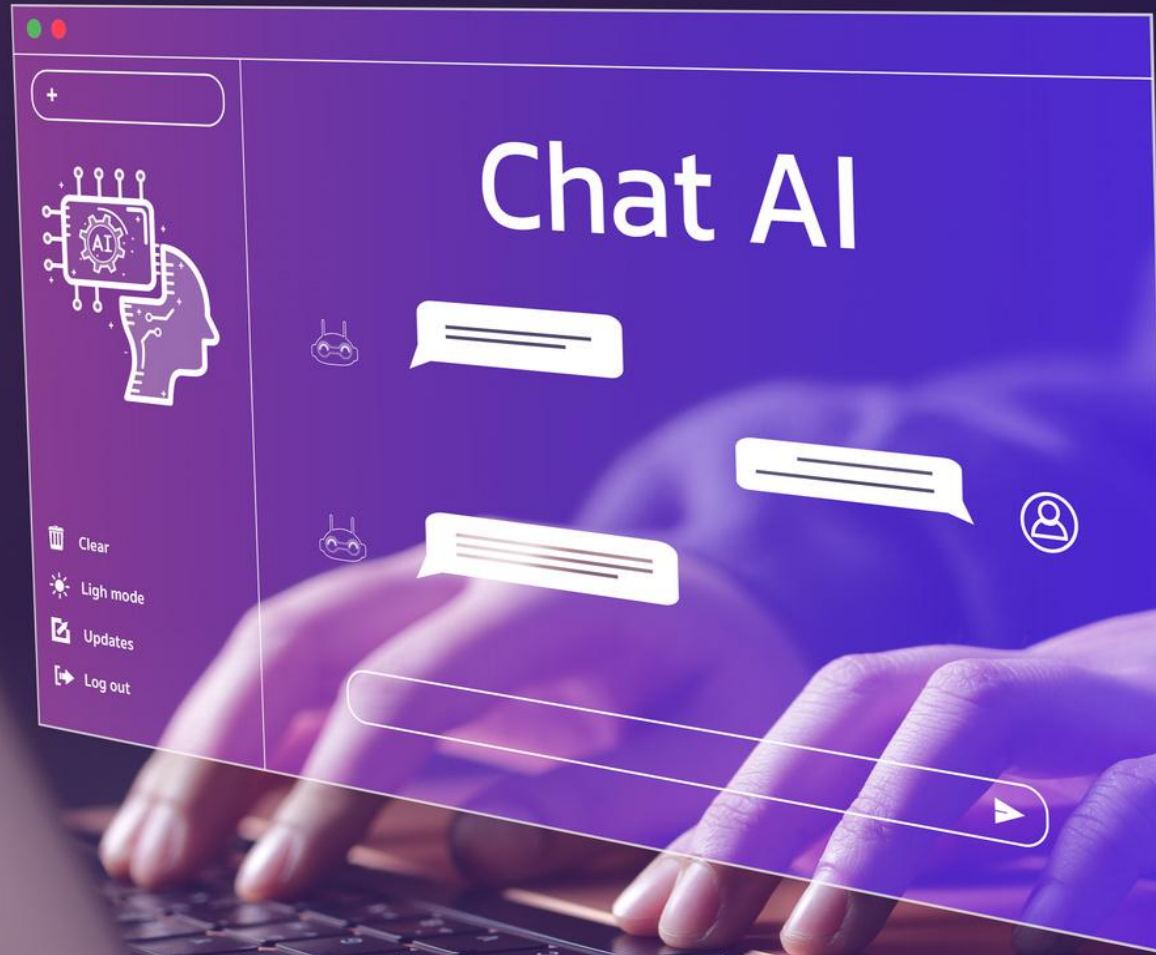
Planning Window for Domestic Leisure Travel

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



For travel marketers, the practical implication is a shorter runway between inspiration and booking. Rising impulse travel rewards always-on presence, real-time inventory and rate visibility, and geographically targeted messaging aimed at drive-time and short-haul markets, and it puts a premium on being findable at the moment the idea arises.

Digital & AI Travel Planning Tools

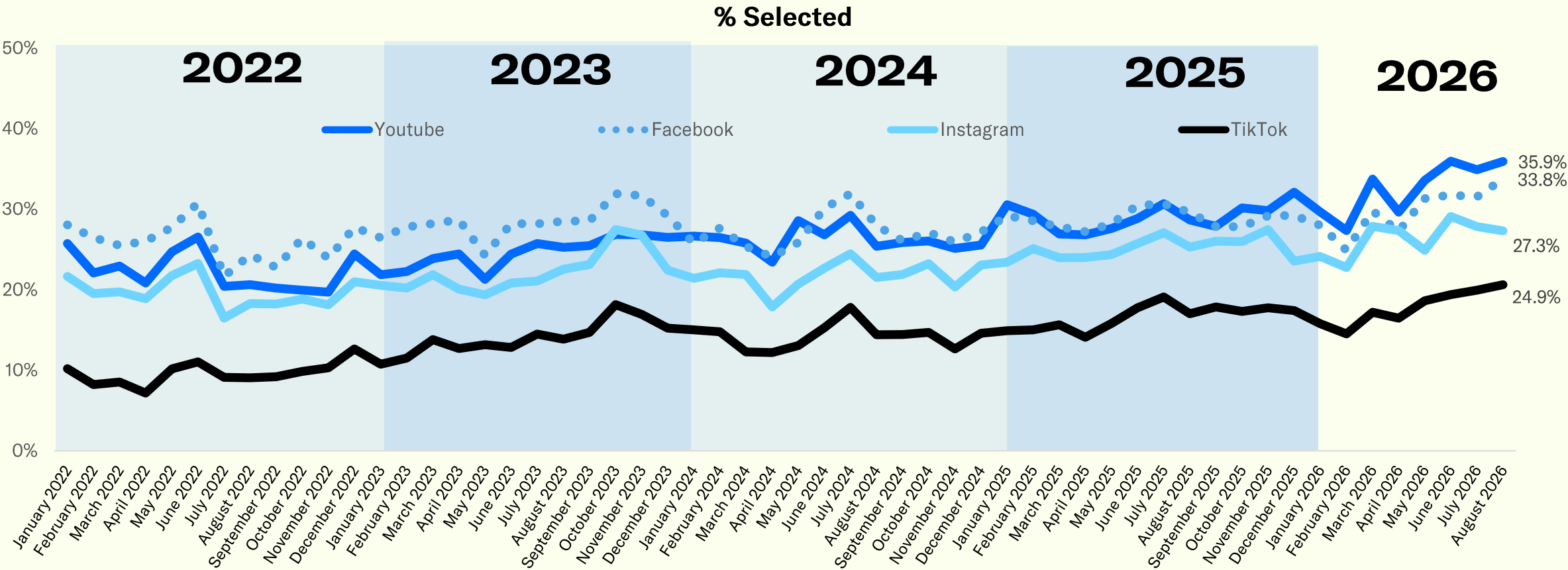


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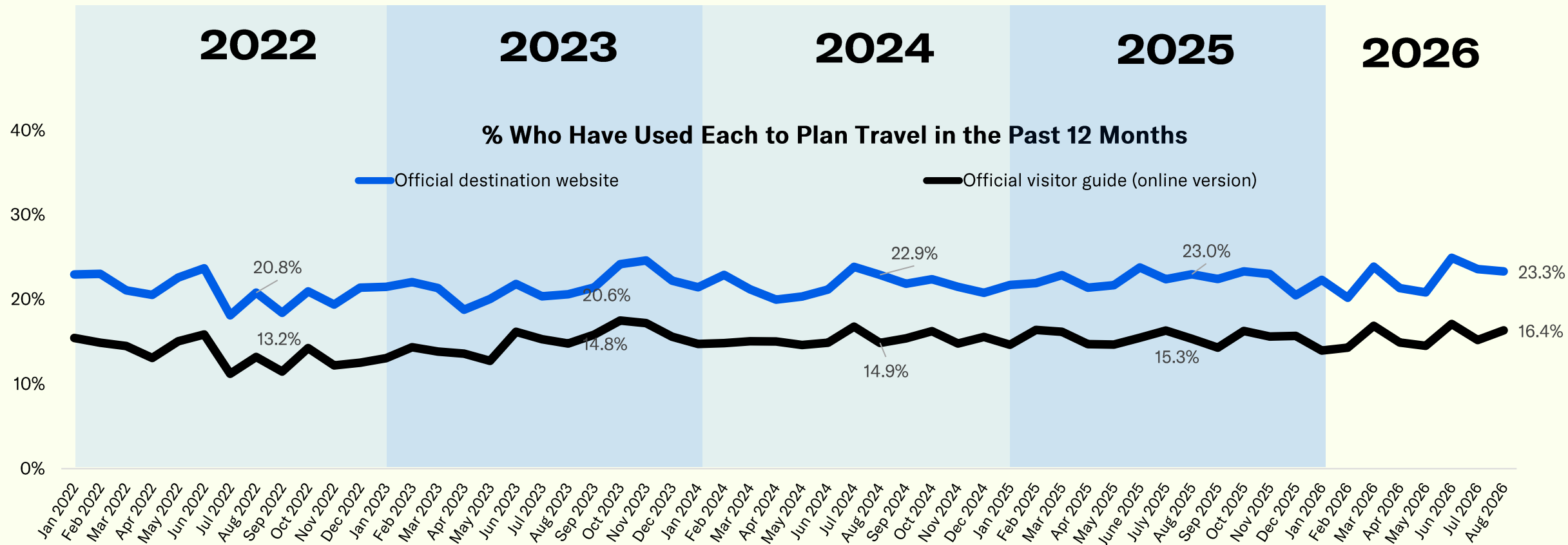
Social platforms set new highs as travel research tools.

Question: In the PAST 12 MONTHS, have you used any of the following social media platforms to prepare for or plan your travels? (Select all that apply)



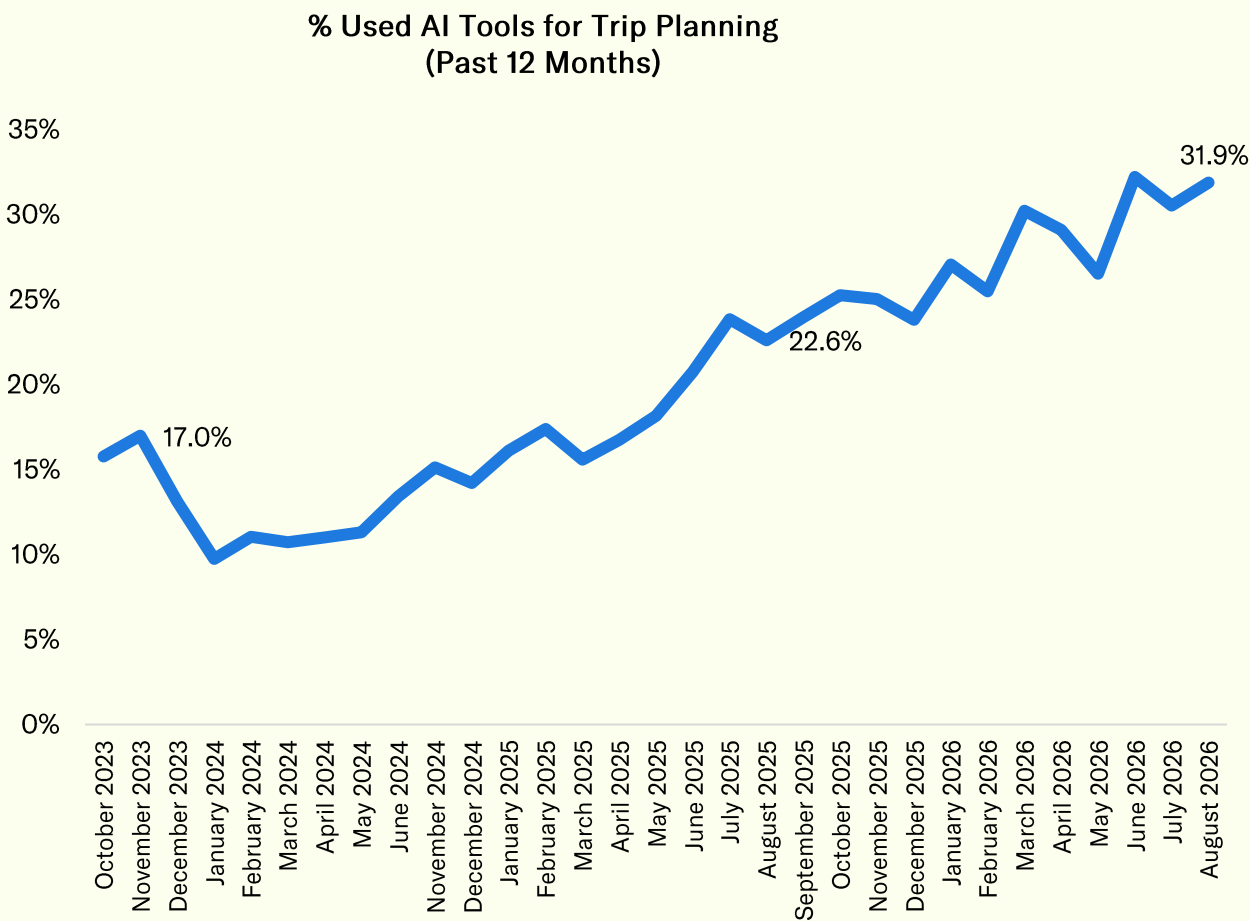
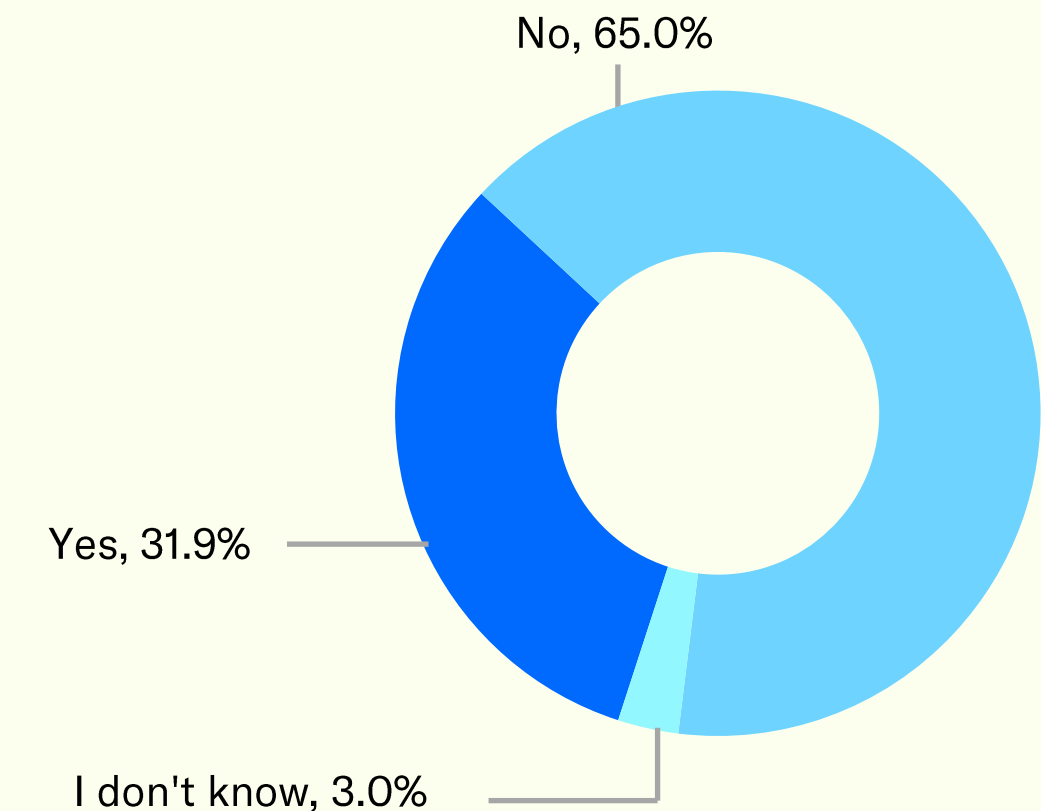
Official destination channels held their ground in the same period.

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)



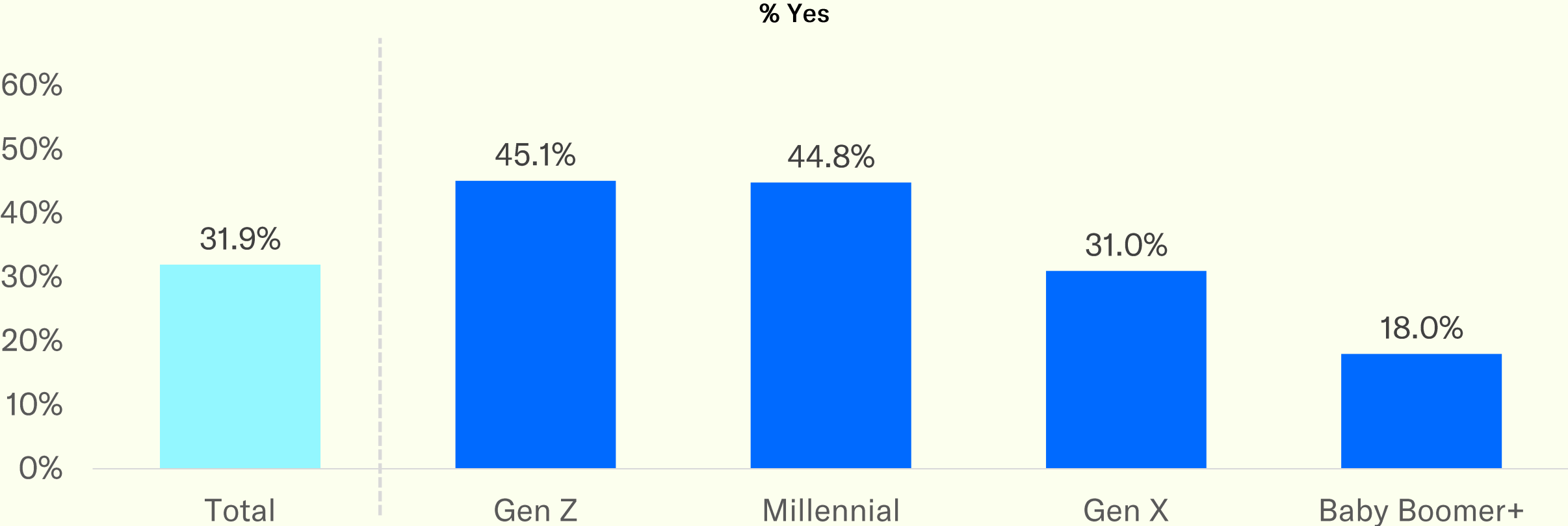
AI adoption for travel planning continues to grow

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



Younger generations have adopted AI tools for travel planning at higher rates

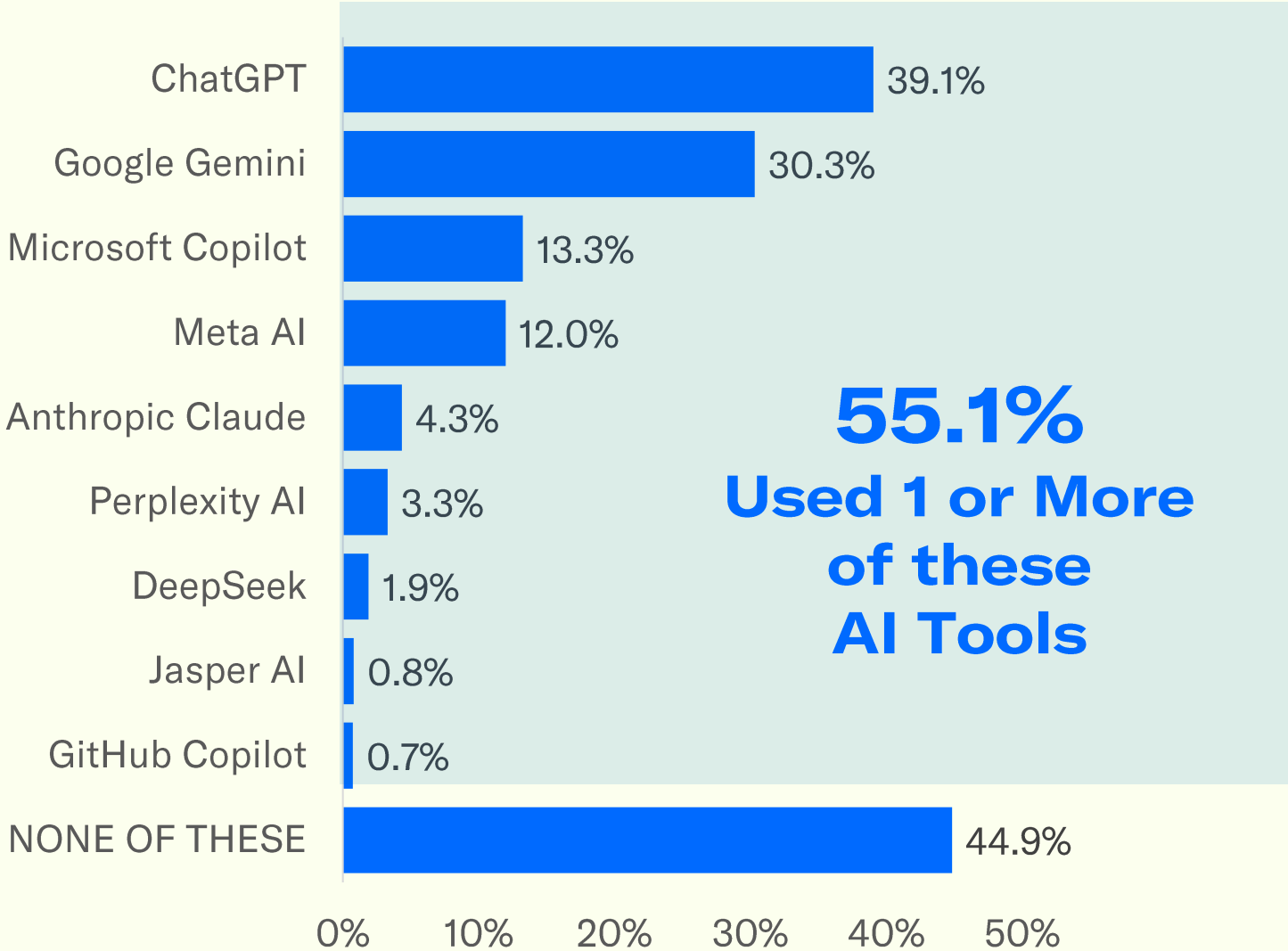
Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



ChatGPT leads other AI tools as a travel planner

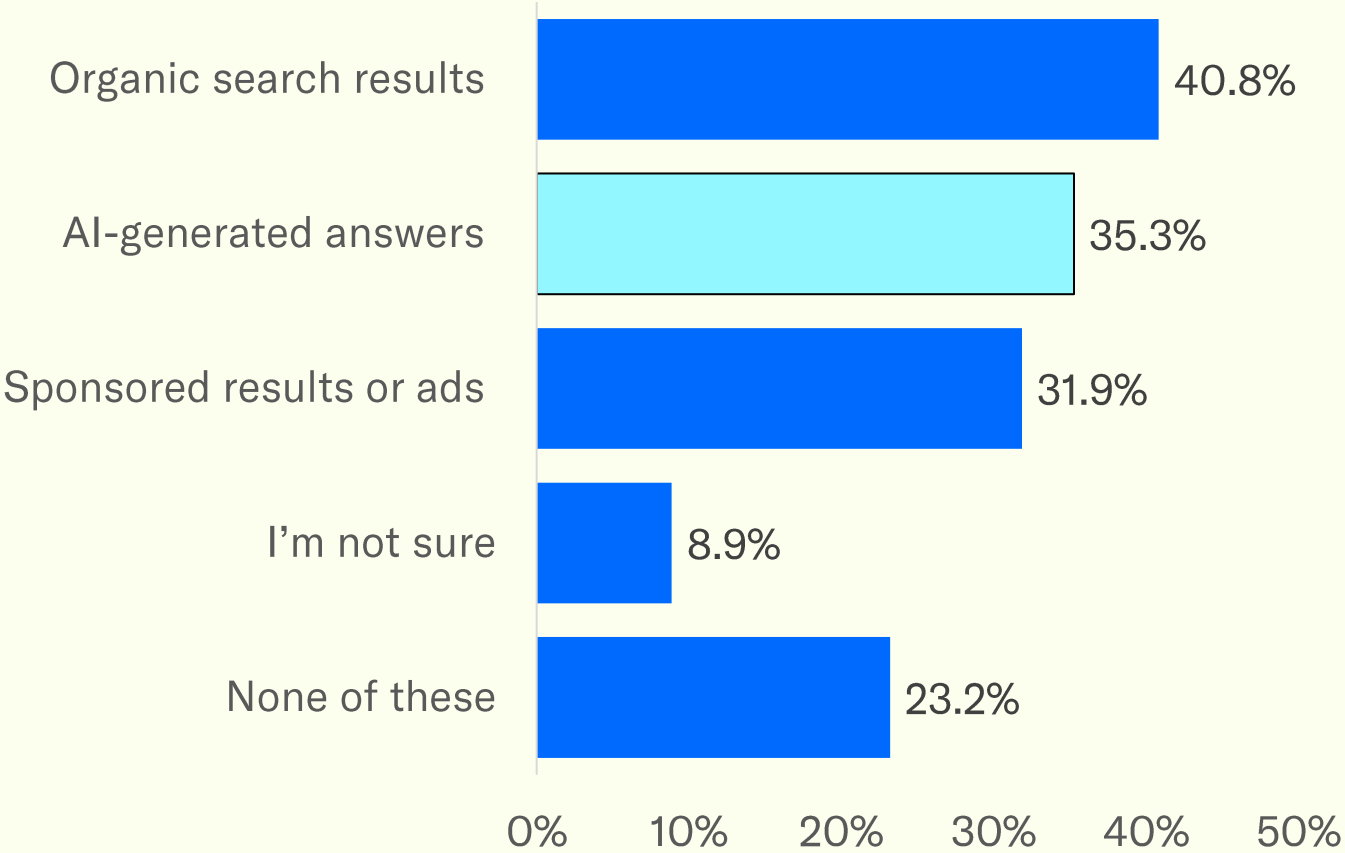
Question:

In the PAST TWELVE (12) MONTHS, which of these Artificial Intelligence (AI) powered tools or chatbots have you used SPECIFICALLY TO HELP YOU PLAN YOUR TRAVEL? (Select all that apply)



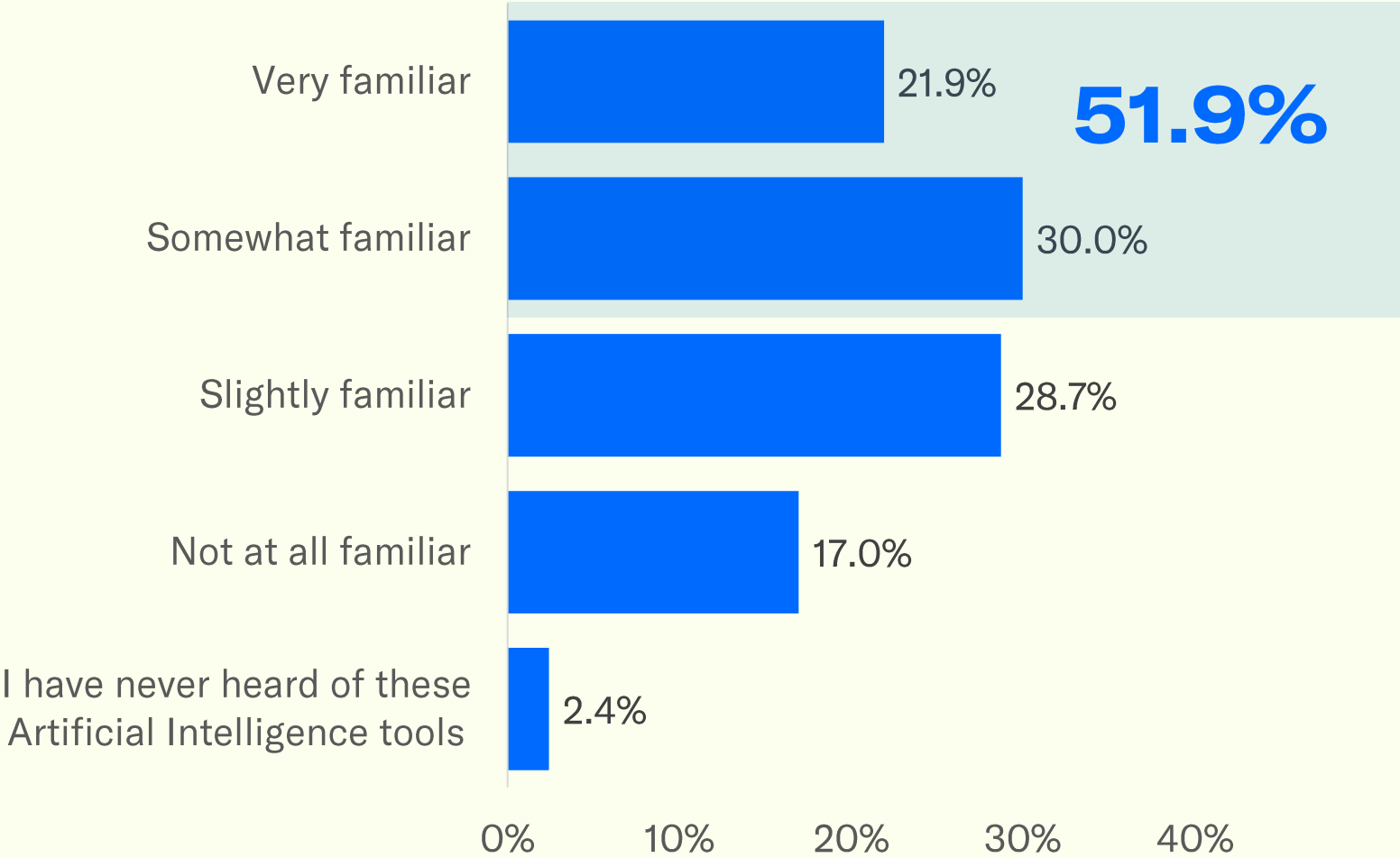
In terms of internet search results used for travel planning, organic search outpaces AI-generated content.

Question:
In the PAST TWELVE (12) MONTHS, which of the following types of Internet search results have you used WHEN LOOKING FOR TRAVEL INFORMATION online? (Select all that apply)



A majority of American travelers are familiar with AI Tools and Chatbots

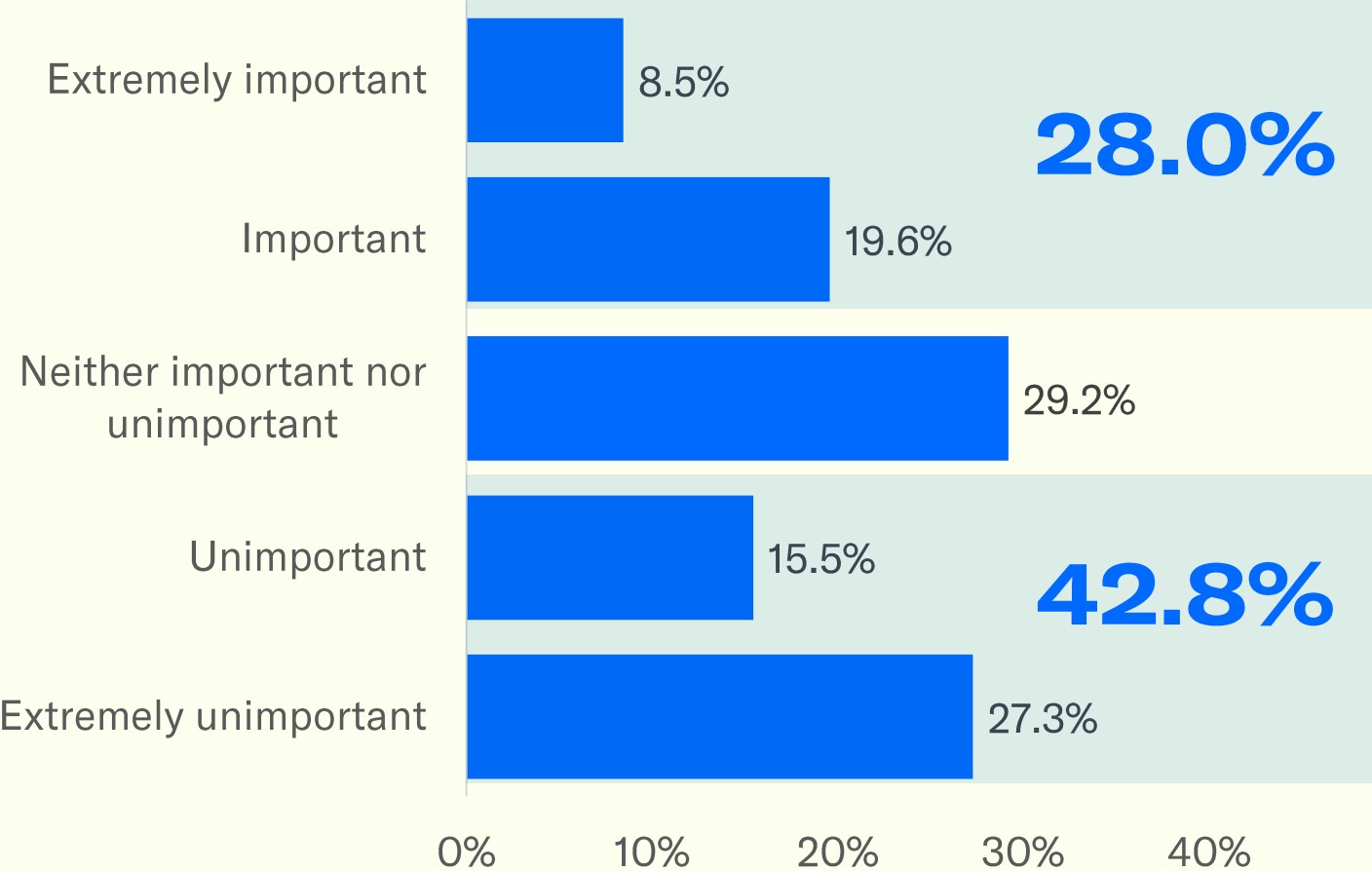
Question:
How familiar are you with popular Artificial Intelligence (AI) powered tools or chatbots like ChatGPT, Gemini, Microsoft Copilot or Claude?



Over a quarter of Americans say AI-generated travel information is important to their planning process

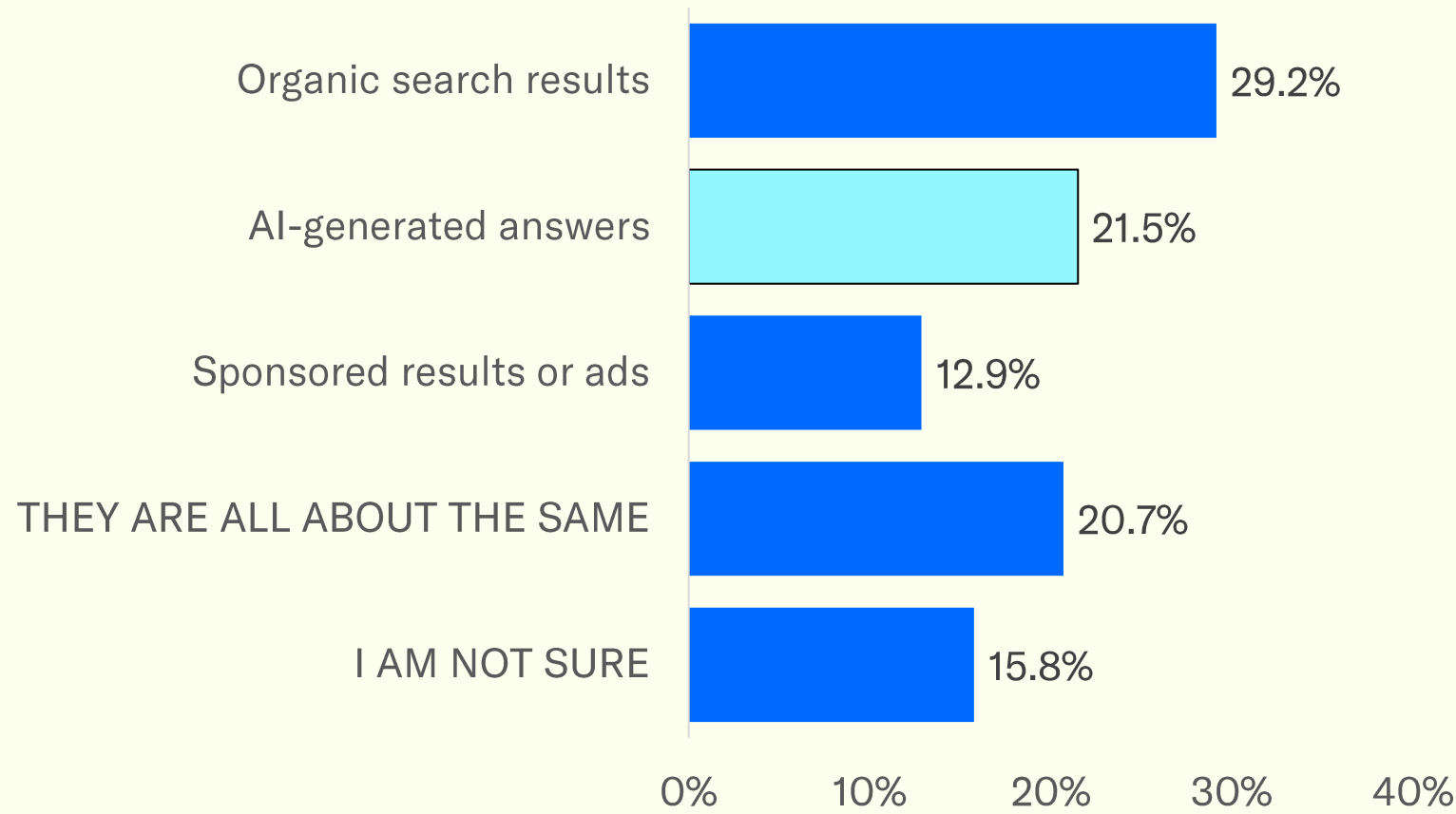
Question:

Overall, how important is Artificial Intelligence (AI)-generated travel information to the way you plan your leisure trips?



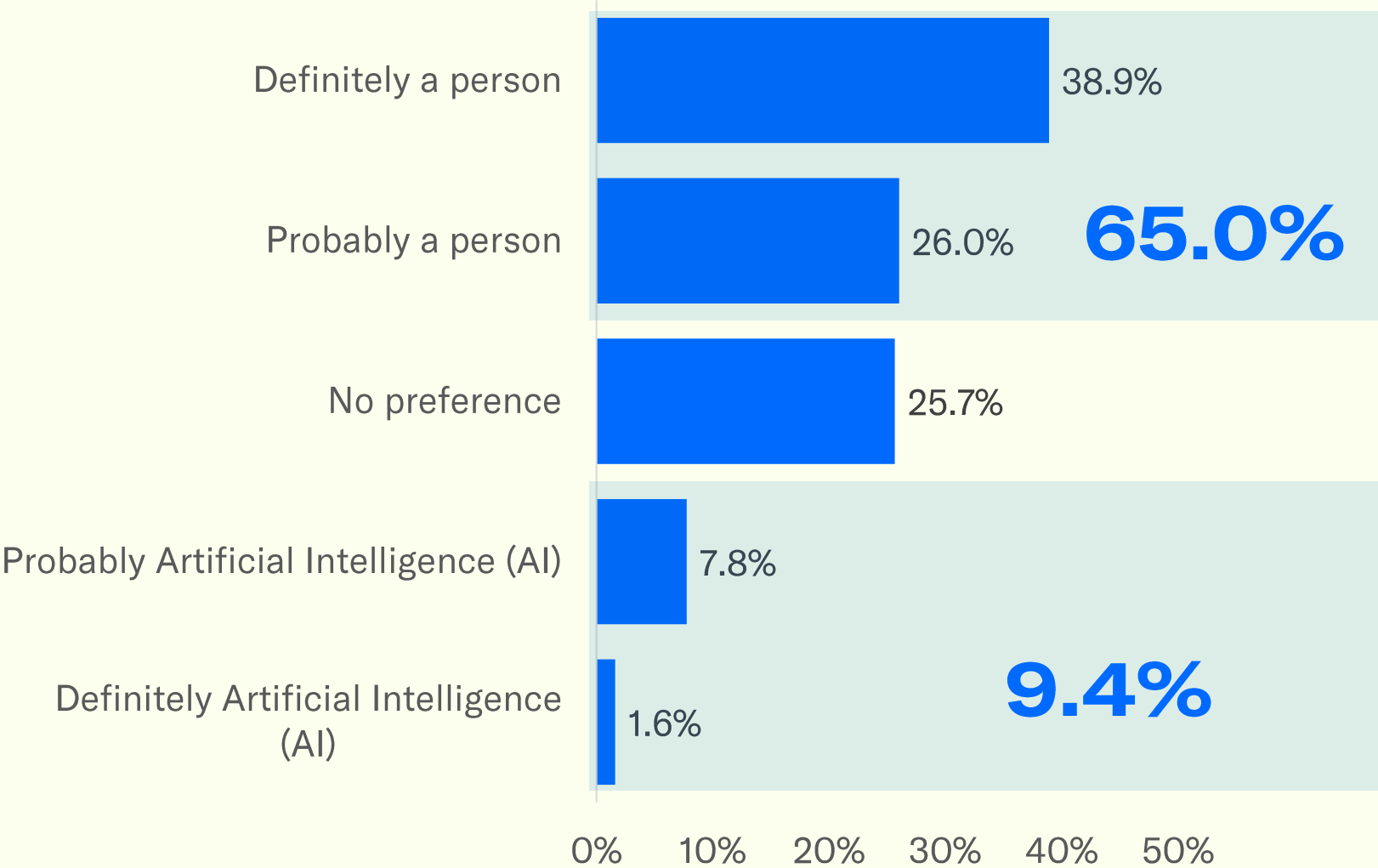
As for which result type they find most helpful, organic search is top, but AI answers are not far behind.

Question:
Which type of search result usually gives you the most helpful travel information? (Select one)



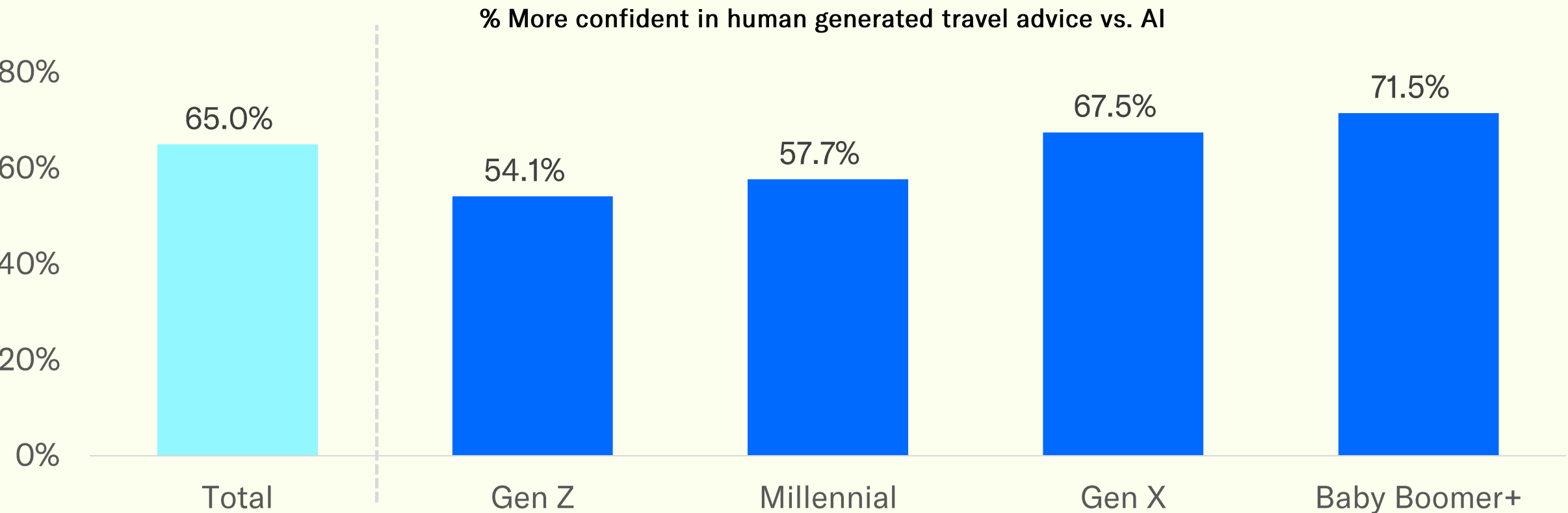
Travelers overwhelmingly are more confident in human generated travel advice

Question:
Which would you feel more confident about getting local travel advice and opinions from (a person or an AI tool)? (Select one)



But this sentiment softens meaningfully among Gen Z and Millennials.

Question: Which would you feel more confident about getting local travel advice and opinions from (a person or an AI tool)? (Select one)



The story from this wave is how quickly the research process is being rebuilt. AI-assisted trip planning reached a new high and the social platforms travelers use to plan are setting records.

Those two shifts are reshaping
where travel marketers need to show up.

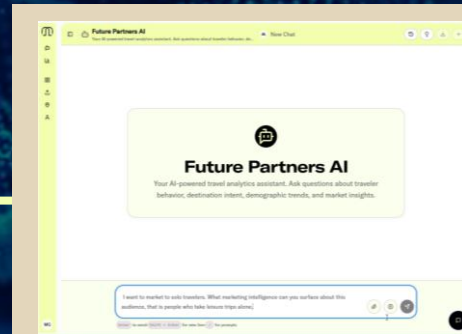
The second story is speed. A quarter of American travelers now take spontaneous trips frequently, the highest level recorded in this study and up nearly eight points from a year ago.

Combined with rising BNPL use among younger travelers, it points to a traveler who decides faster and finances differently than the one travel marketers planned for even a year ago.

You can now explore these insights using **Future Partners AI** which was purpose built to give you *sharper answers, smarter strategy, and faster decisions.*

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The Travel
Industry's
Insights Agent

UPCOMING WEBINAR

Traveler Segments

Powered by The State of the American Traveler

Tuesday, September 15, 3 PM ET



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President
Tourism Economics



Myha Gallagher

Vice President, Brand
Future Partners



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Head of Research & Insights
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PARTNERSHIP

We're spotlighting three high-impact traveler segments, sharing new research and highlighting unique trends, including:

Off-the-Beaten-Path Travelers: The latest insights on how to drive dispersal to lesser-known parts of your destination and away from hot spots.

AI-Empowered Travelers: We'll examine AI early adopters and premium AI users to predict the future transformation of travel planning & booking.

K-Shaped Economy Travelers: We'll present fresh research on how travel preferences, behavior and media use of American travelers differs by household income.

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