

September 2026

Future Partners

Sponsored by Miles Partnership

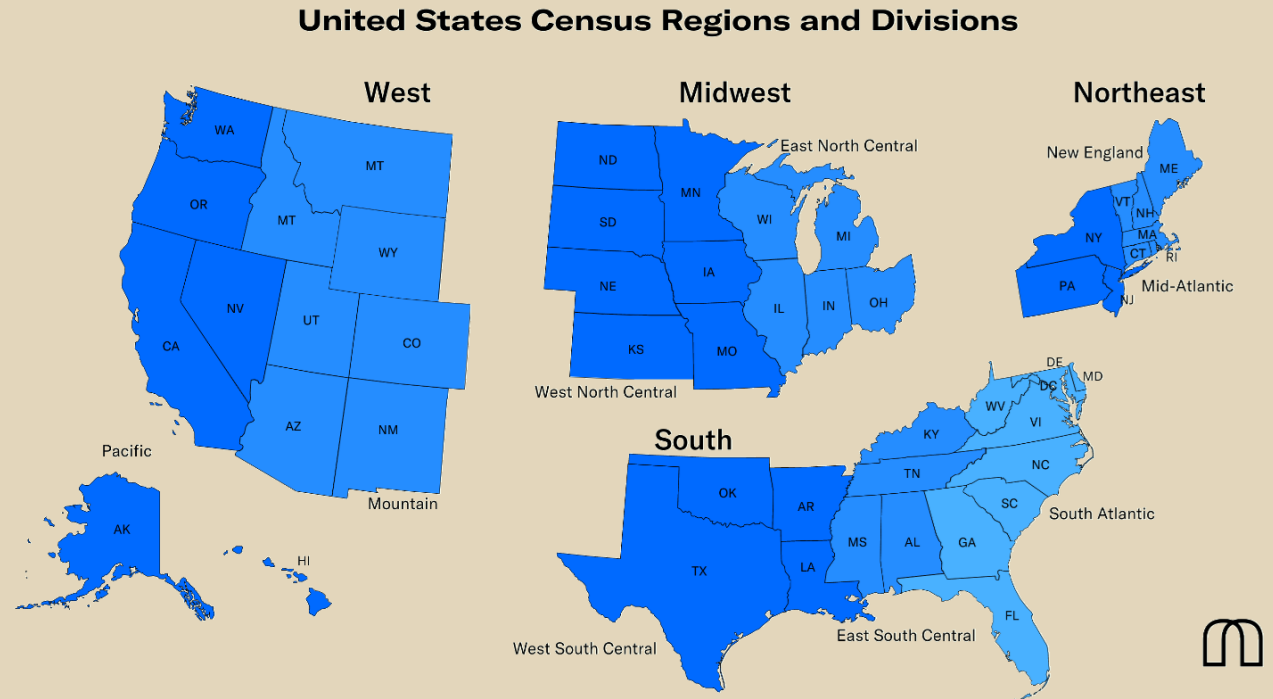
***The State of the
American Traveler***
Traveler Segments

*Bringing the future of travel
within reach*

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The State of the American Traveler

- 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
- 4,000+ fully completed surveys collected each wave.
- Surveys collected thru [August 2026](#)
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Today's Segment Deep Dives

- *Setting the Stage: Current Travel Sentiment*
- *The K-Shaped Travelers*
- *The AI-Assisted Traveler*
- *The Dispersal Traveler*

Travel Sentiment

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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

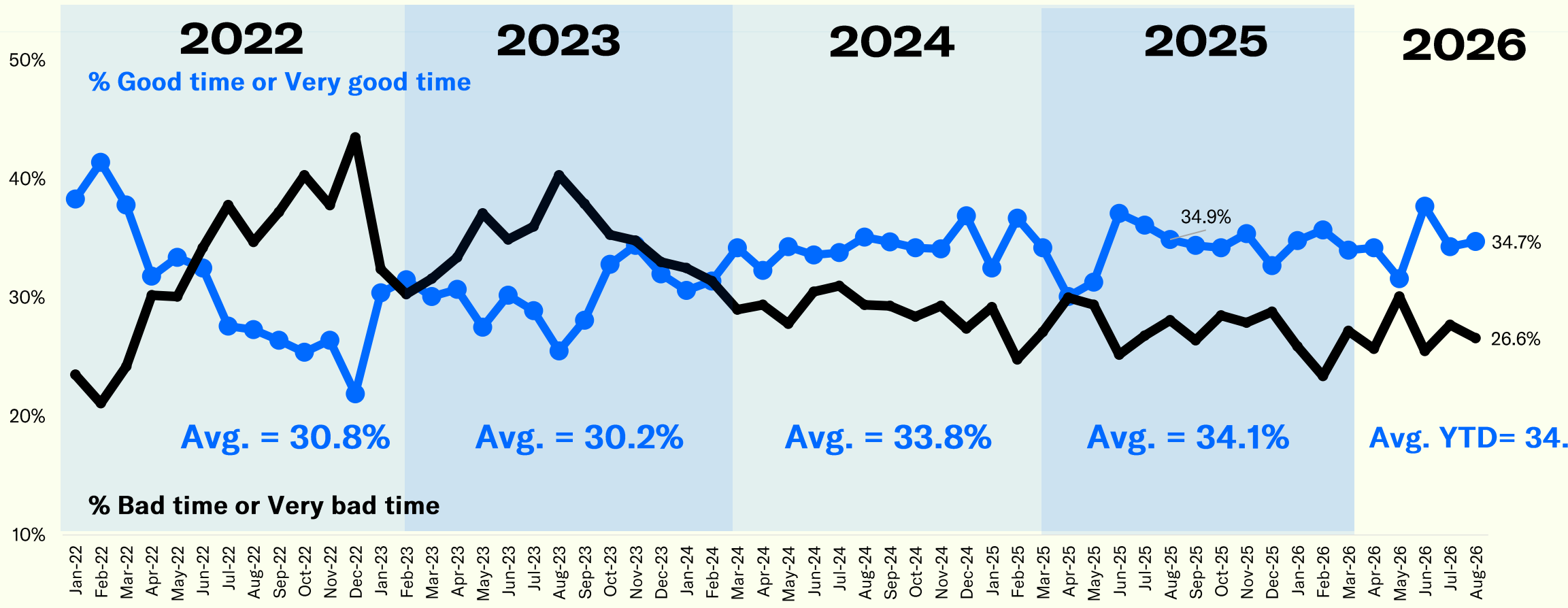
7.4%

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

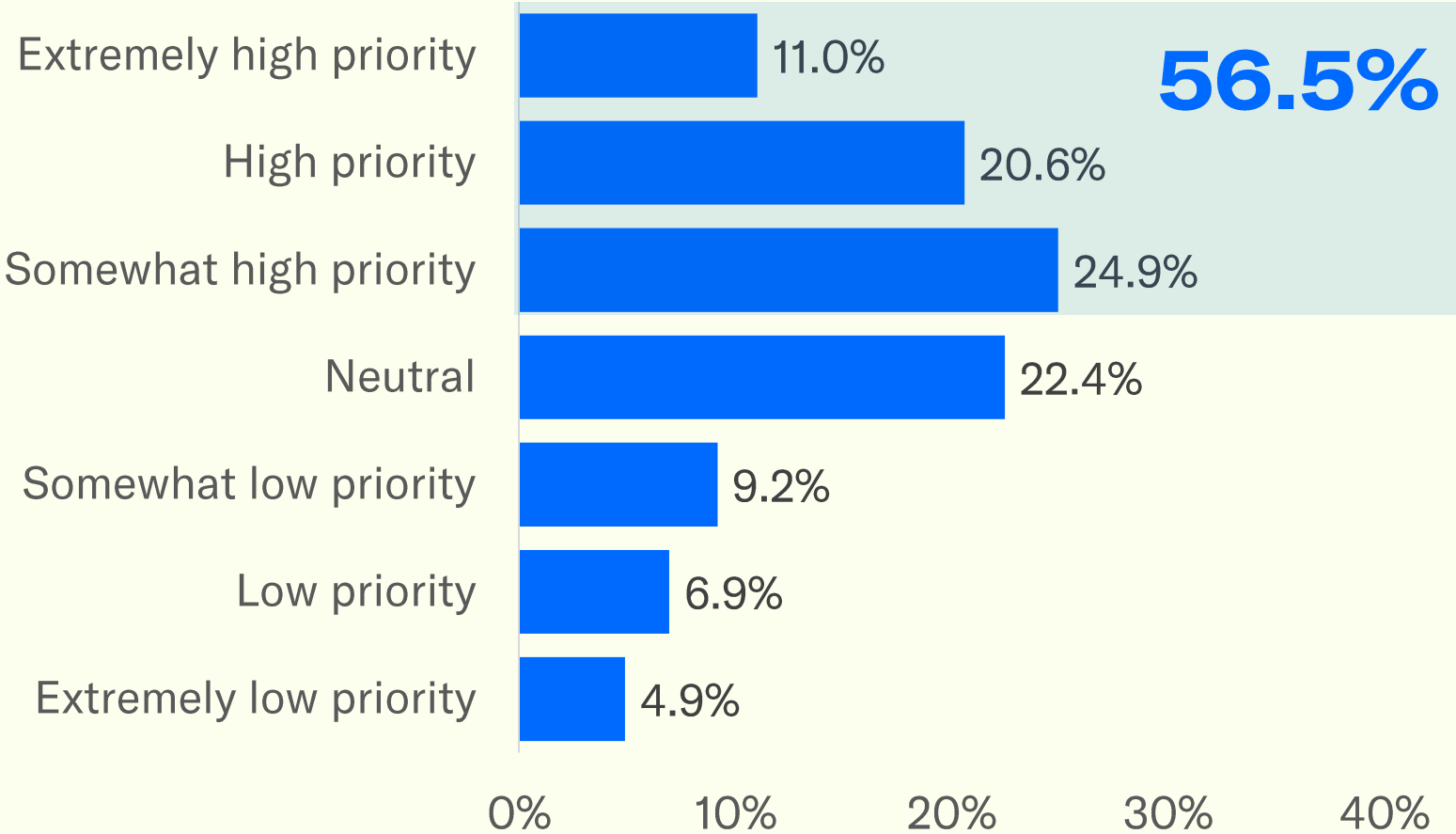
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



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

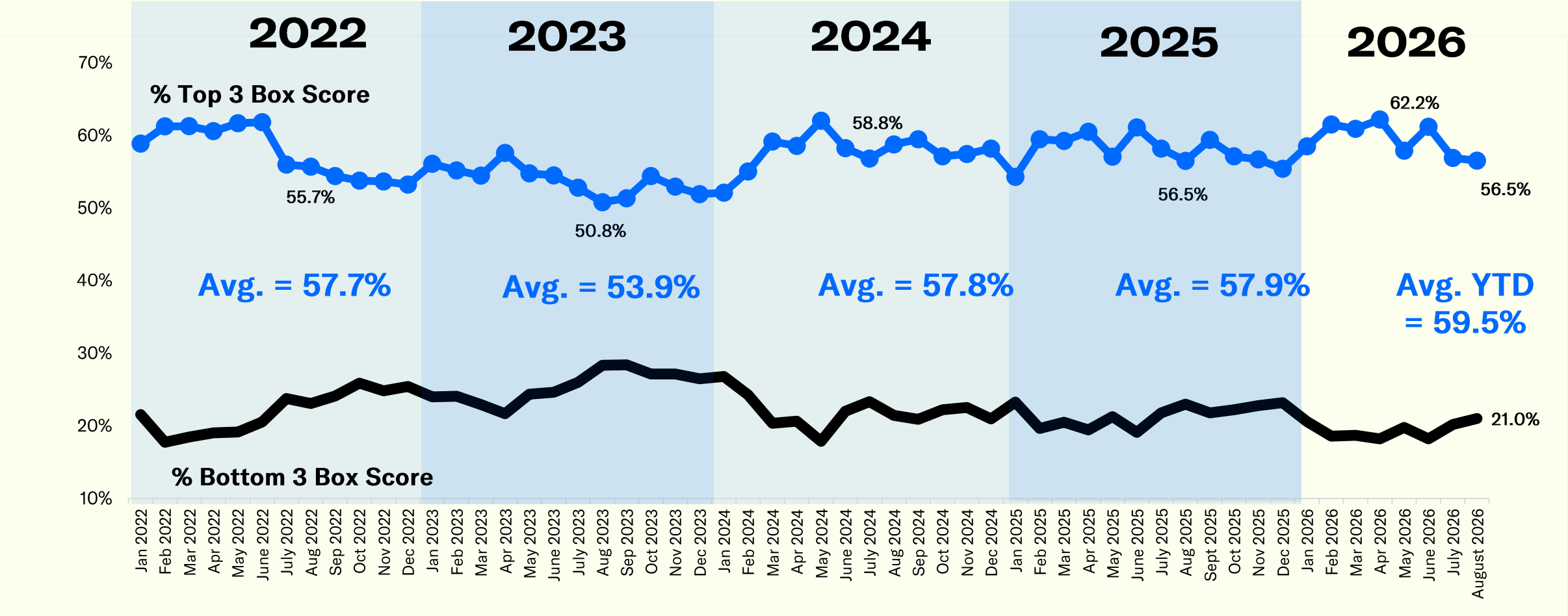
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

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.

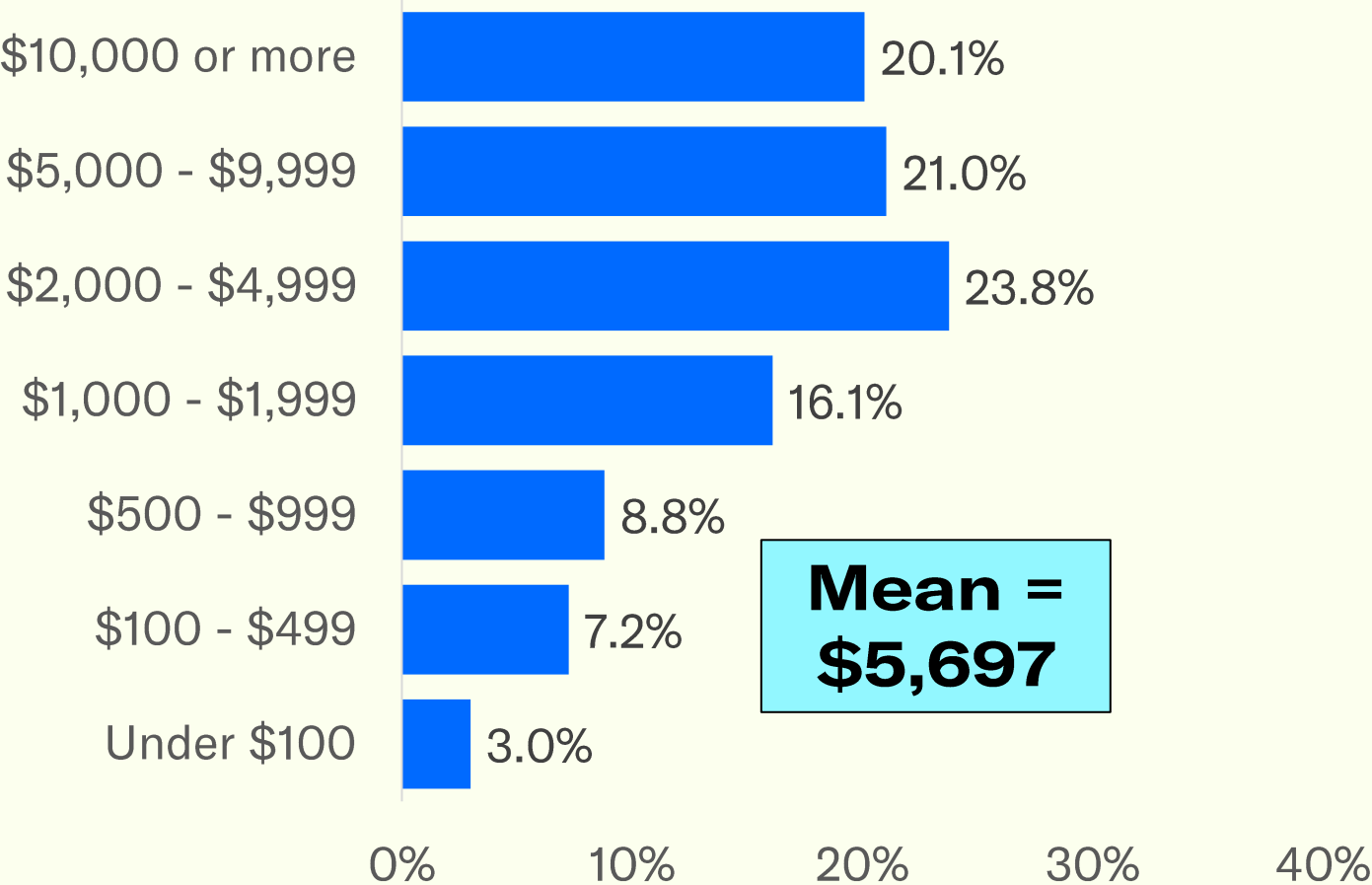


The average American traveler is reporting \$5,340 for their annual travel budget

Question:

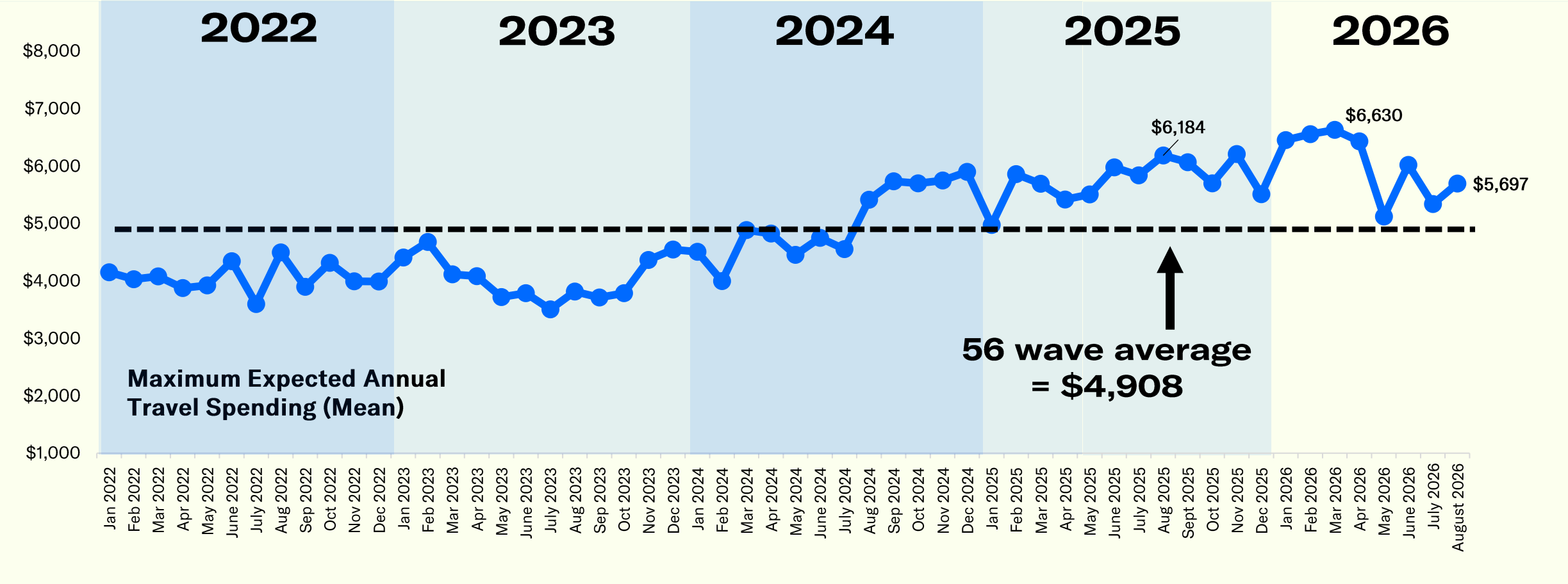
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

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



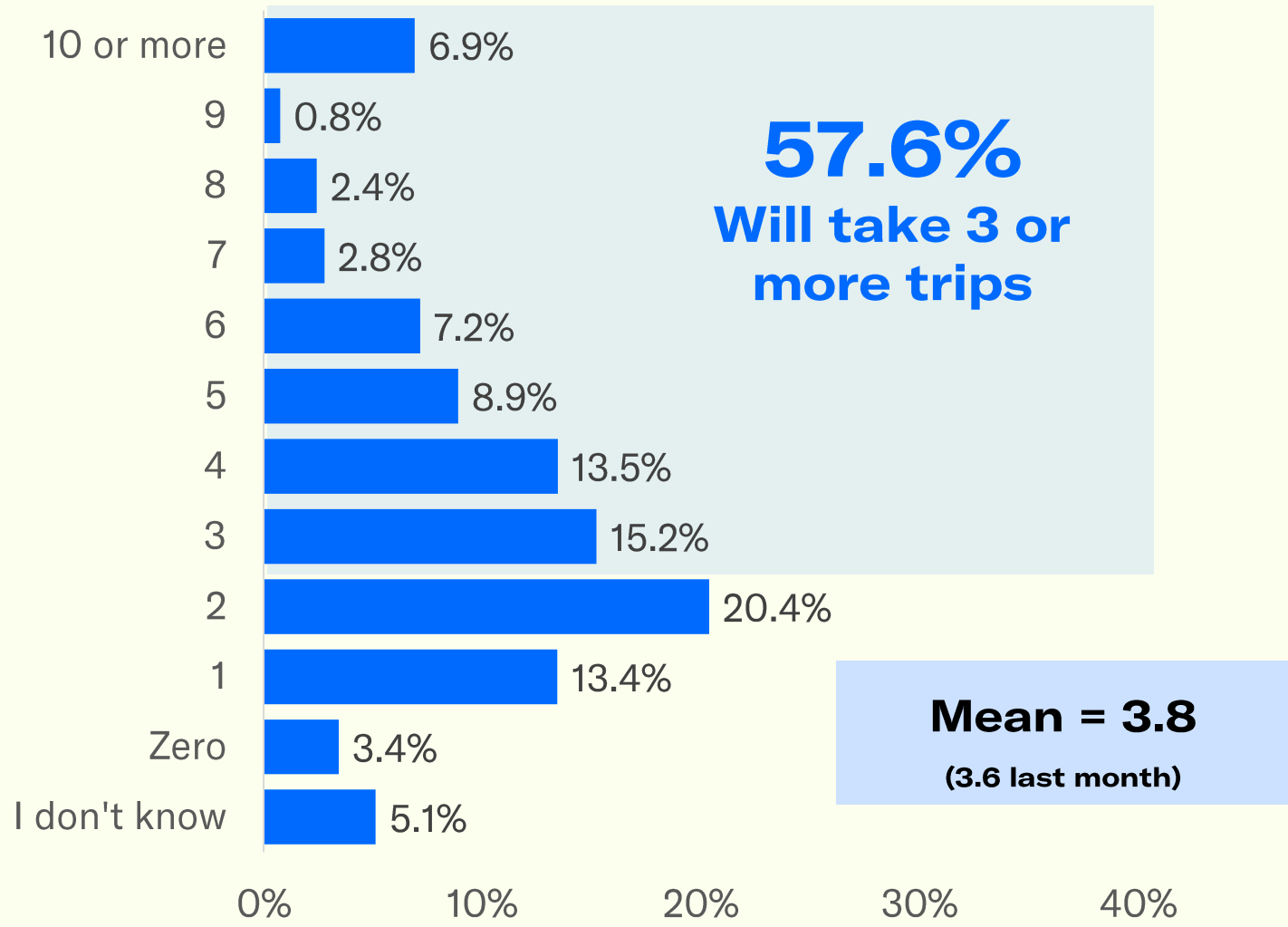
Americans' travel budgets have improved

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):



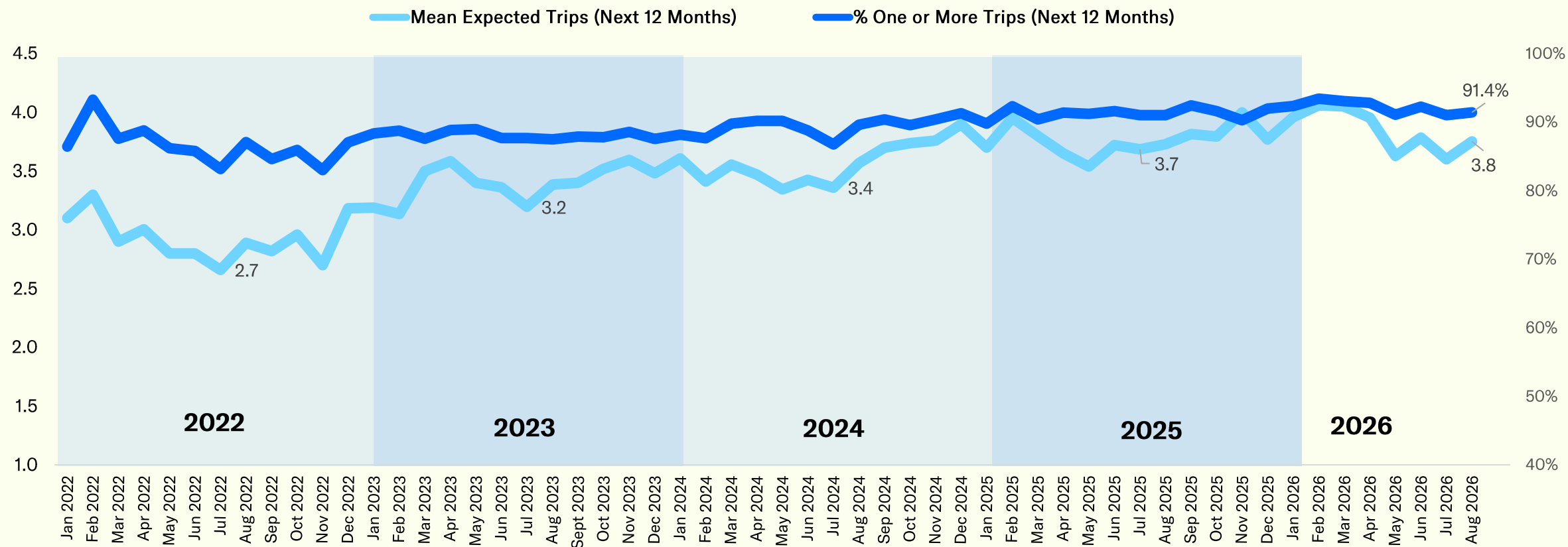
Trip volume expectations for the next 12 months rebounded

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)



While down from the start of the year, leisure trip volume expectations are in line with 2025 levels

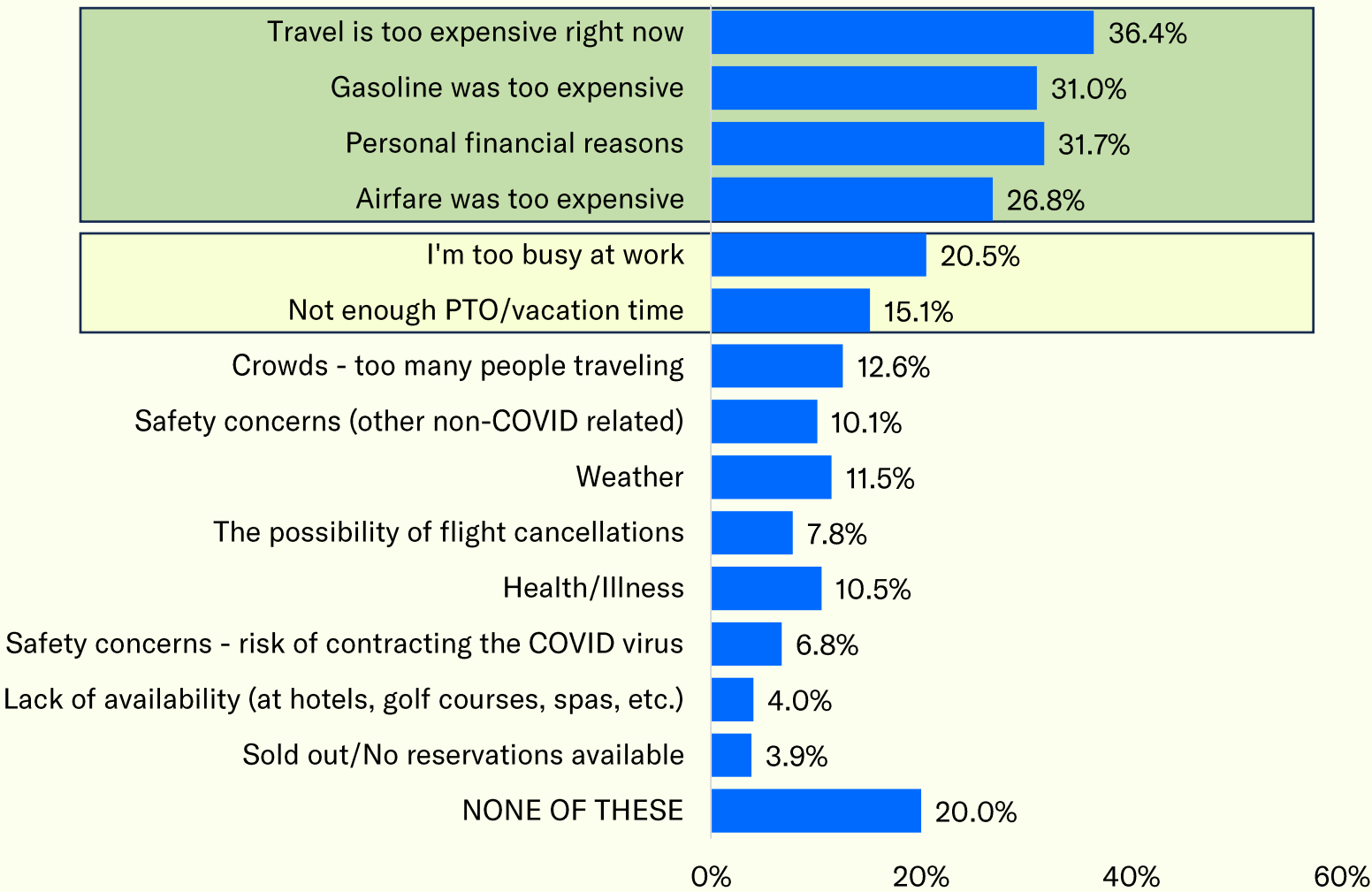
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



Deterrents to Traveling in the Past 6 Months

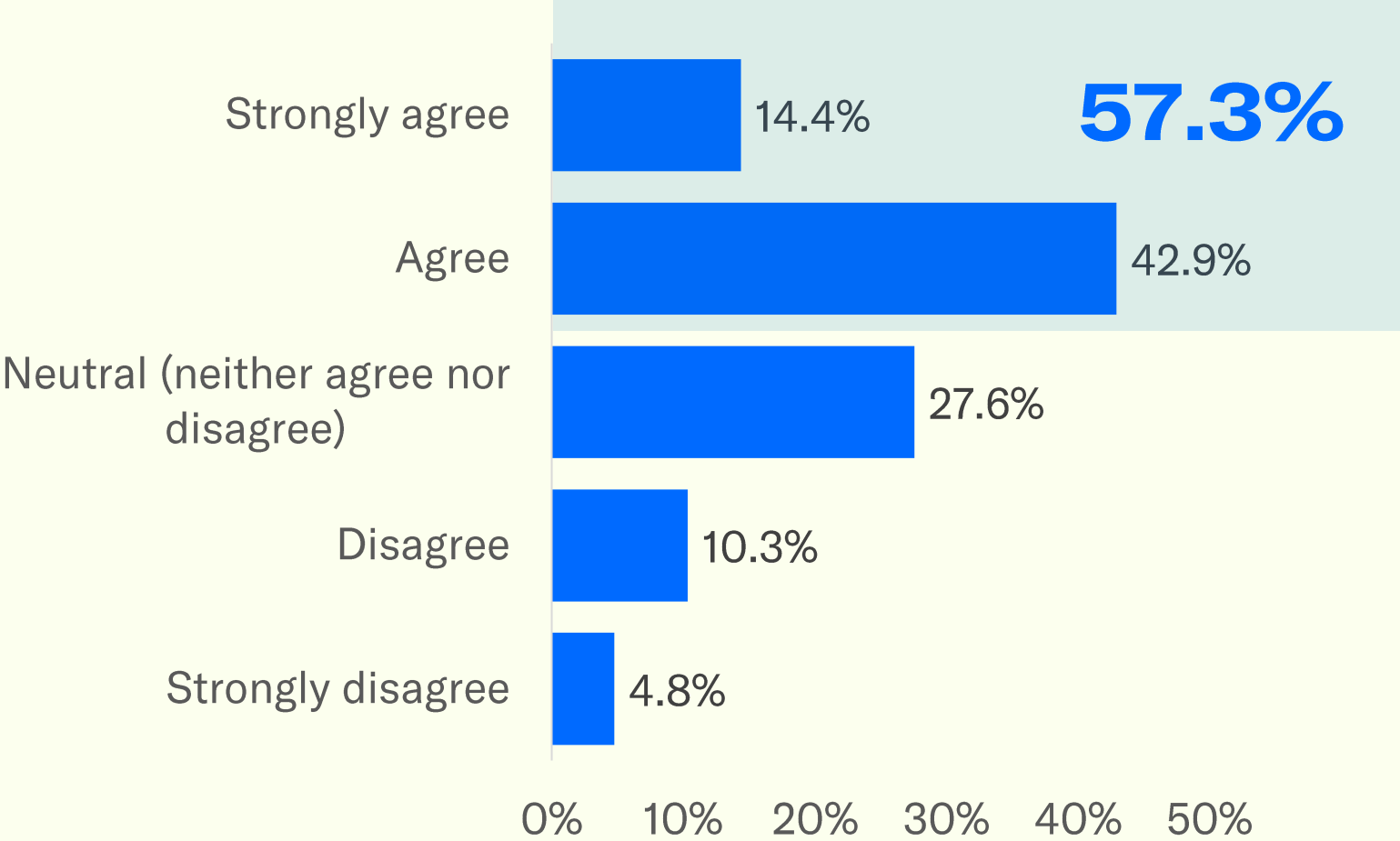
Question:

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)



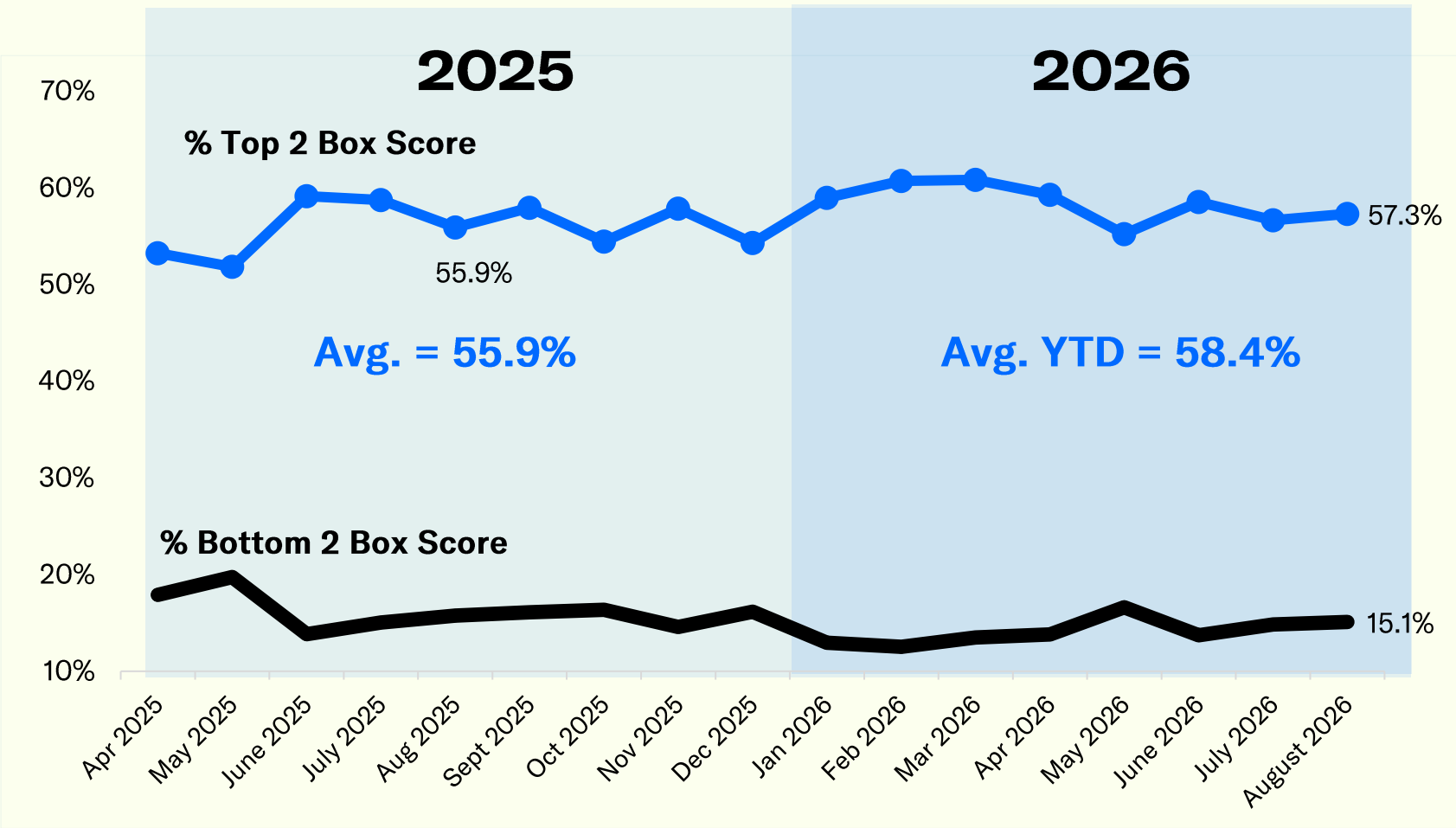
A majority of Americans still feel travel is a worthwhile investment, even in a recession.

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



In fact, those saying travel spending is a worthwhile investment has grown in 2026.

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



Financial barriers including travel costs, gas prices, or personal finances are the dominant force constraining travel behavior.

Despite these headwinds, most Americans still consider travel a worthwhile investment even in a recession, pointing to an audience with durable travel commitment that is becoming more value-sensitive rather than simply opting out.



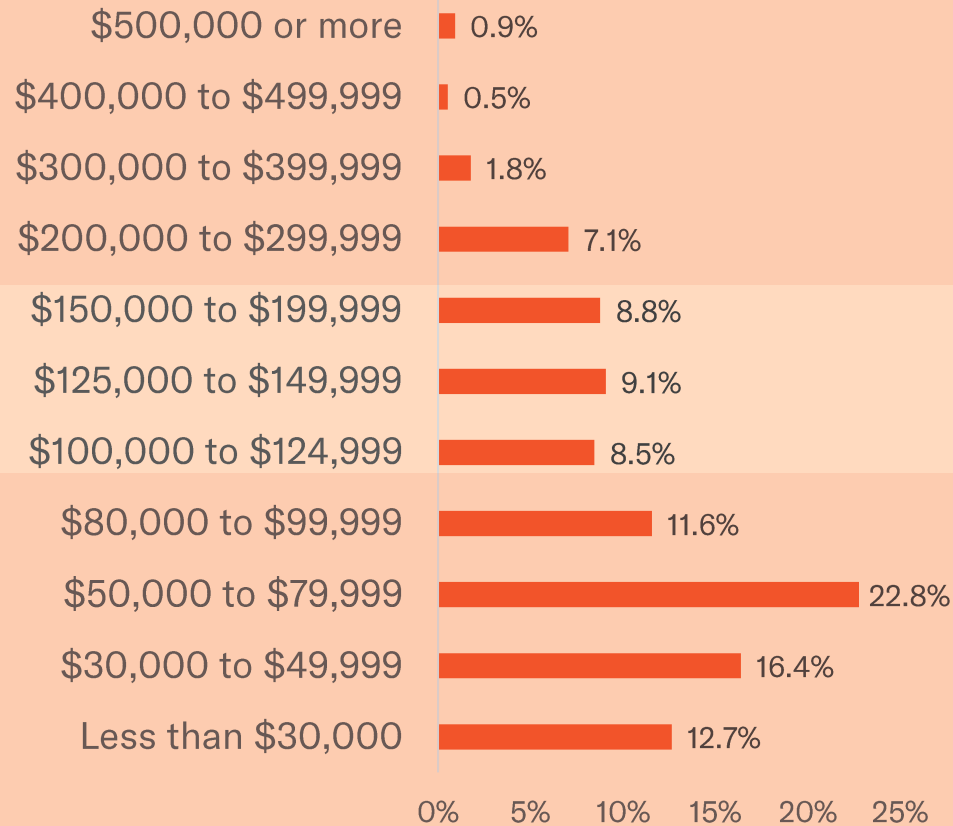
K-Shaped Travelers

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What Is the K-Shaped Recovery (and Why Does It Matter for Travel)?

American Travelers: HHI



Top 10%

earners are U.S. travelers who make an **annual household income of \$200,000 or more**

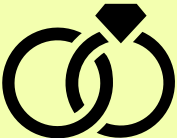
Lower k (Bottom 60%)

segment is comprised of U.S. travelers who earn an **annual household income of less than \$100,000**

The Divide at a Glance: Travel Behavior

		Top 10%	Lower k (Bottom 60%)
	# of Trips Taken	4.4 leisure trips	2.6 leisure trips
	Flew Commercial	90.0%	46.2%
	Traveled Abroad (P12M)	64.7%	18.4%
	Maximum Travel Budget	\$12,263	\$3,127
	Mean Days Available for Travel	20.0 days available	12.8 days available

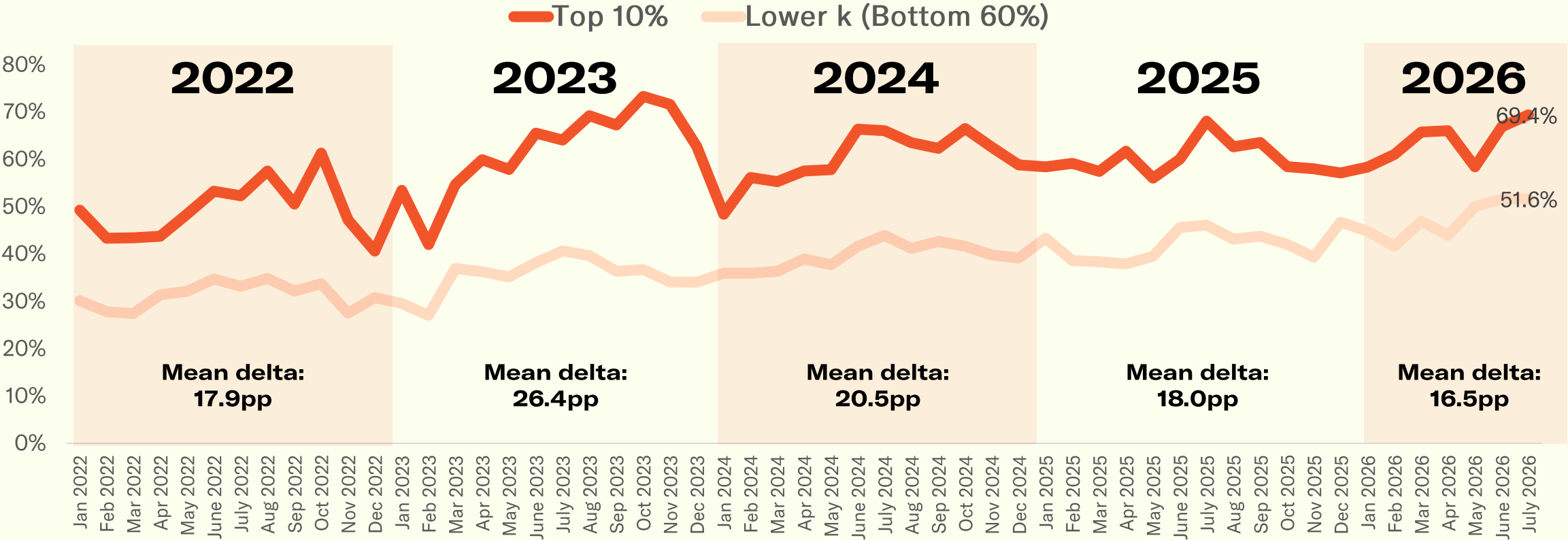
The Divide at a Glance: Demographic Portraits

		Top 10%	Lower k (Bottom 60%)
	Married	80.9%	34.1%
	College Graduate	58.8%	15.0%
	Employed Full-time	80.8%	49.9%
	Parent to school aged children	39.4%	27.7%

Top 10% outpace bottom 60% for overnight leisure trips taken.

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH?

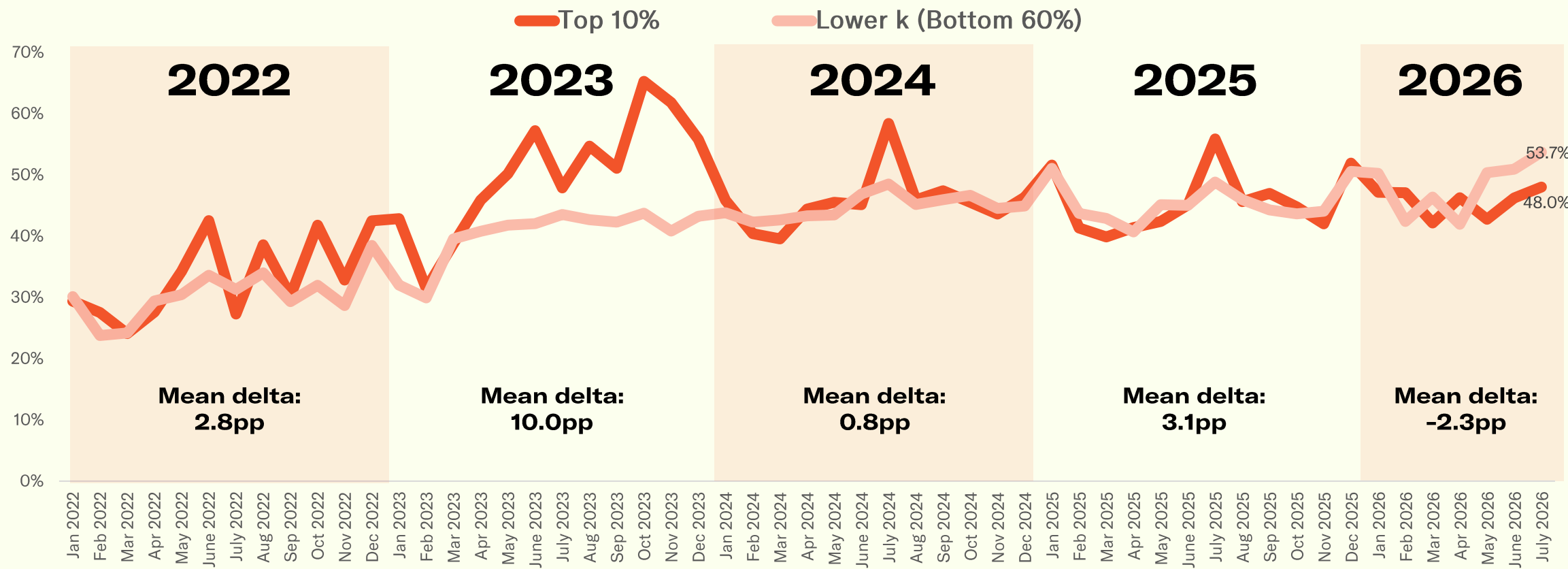
% Taking 1 or more Overnight **Leisure** Trips (Past Month)



Lower k travelers now outpace top 10% in for taking recent VFR trips.

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH?

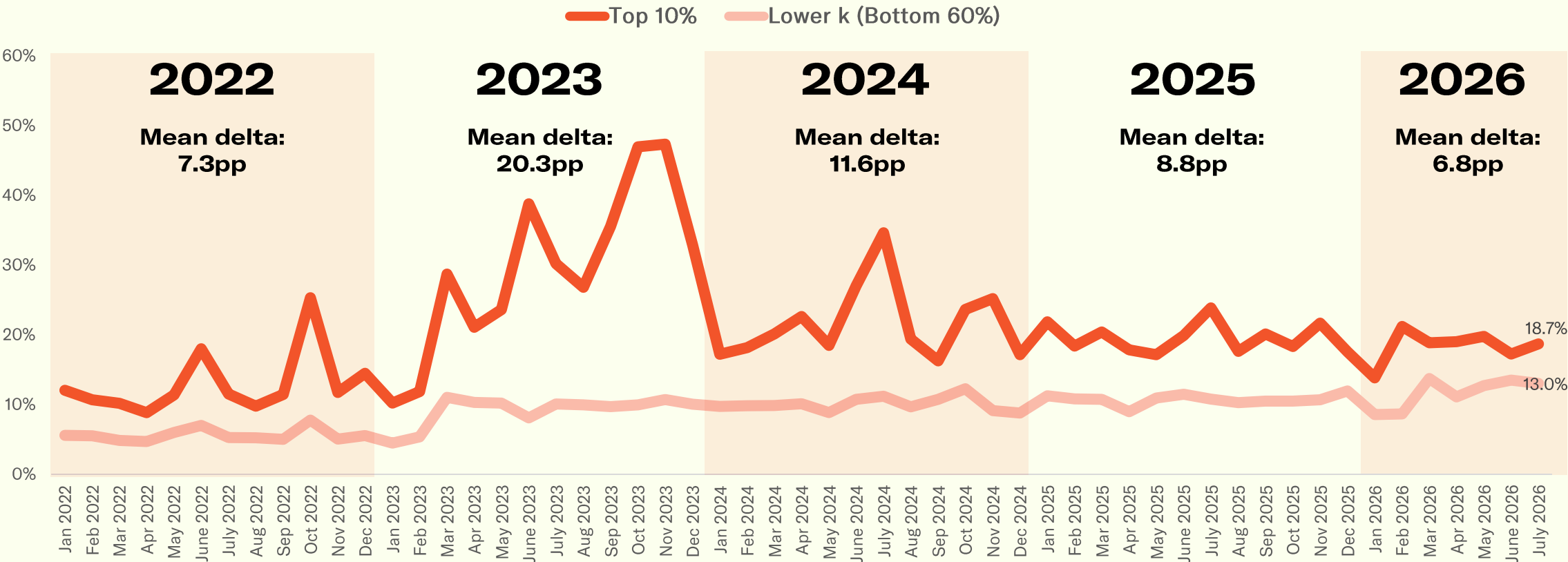
% Taking 1 or more Overnight **VFR** Trips (Past Month)



Top 10% outpace Bottom 60% for overnight convention trips taken, but the delta is declining.

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH?

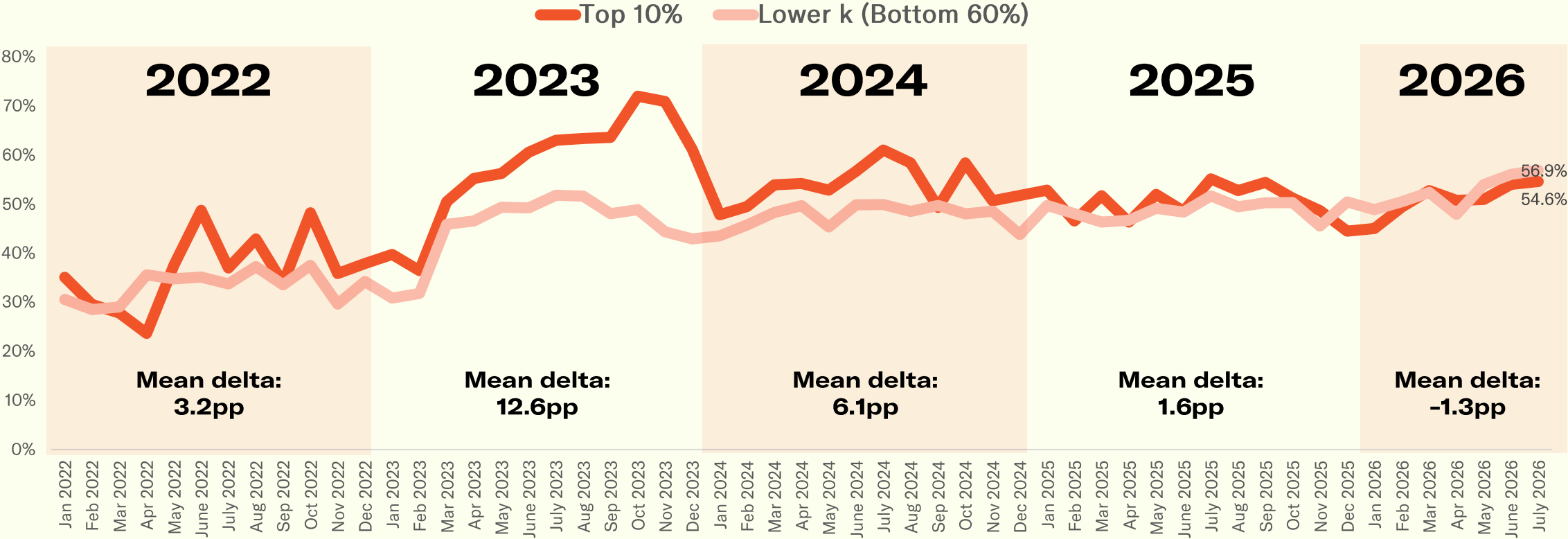
% Taking 1 or more Overnight **Conference/Convention** Trips (Past Month)



Both segments are taking leisure day trips at a similar rate in 2026.

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

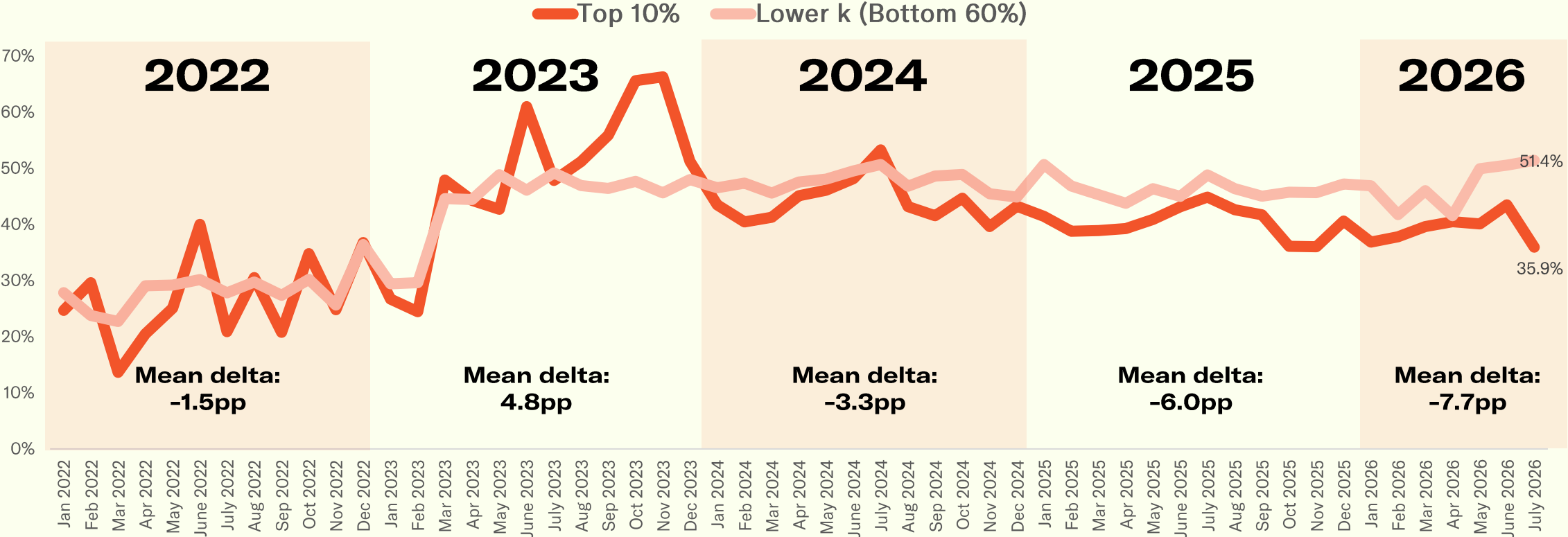
% Taking 1 or more **Day Leisure** Trips (Past Month)



Bottom 60% increasingly is outpacing top 10% for taking VFR day trips.

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

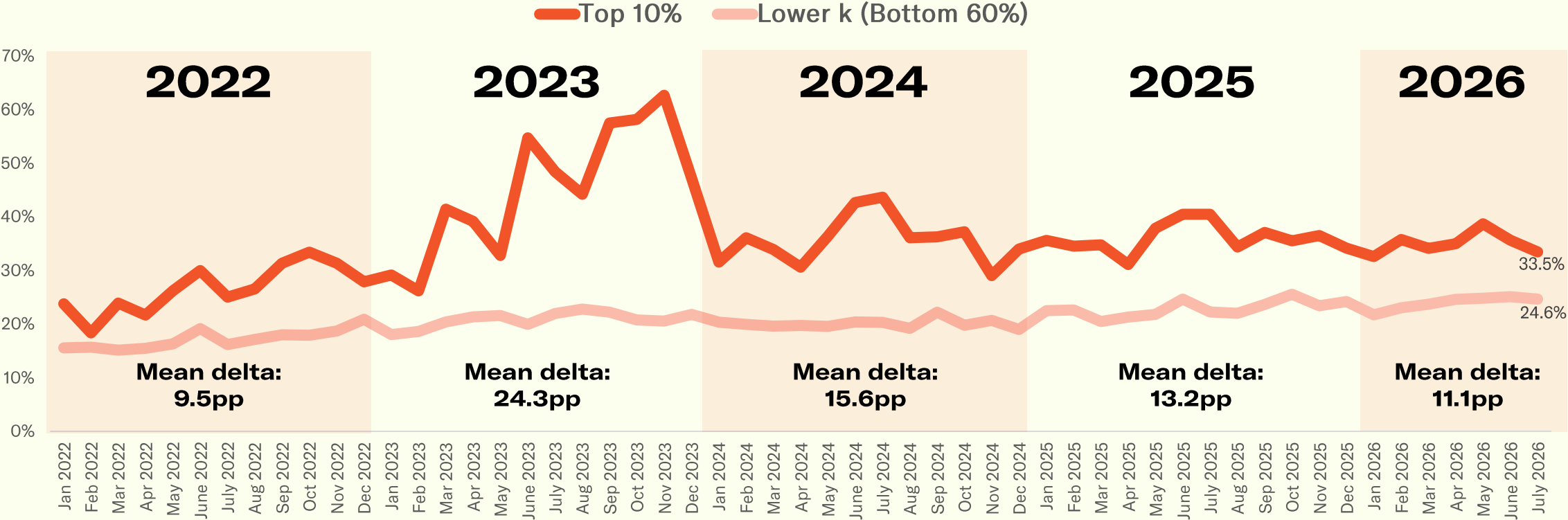
% Taking 1 or more **Day VFR** Trips (Past Month)



Top 10% have taken more trips to attend sporting events historically.

Question: In the PAST 12 MONTHS, have you traveled specifically to attend a sporting event? (Please include travel to professional, semi-professional, amateur or school-related sporting events)

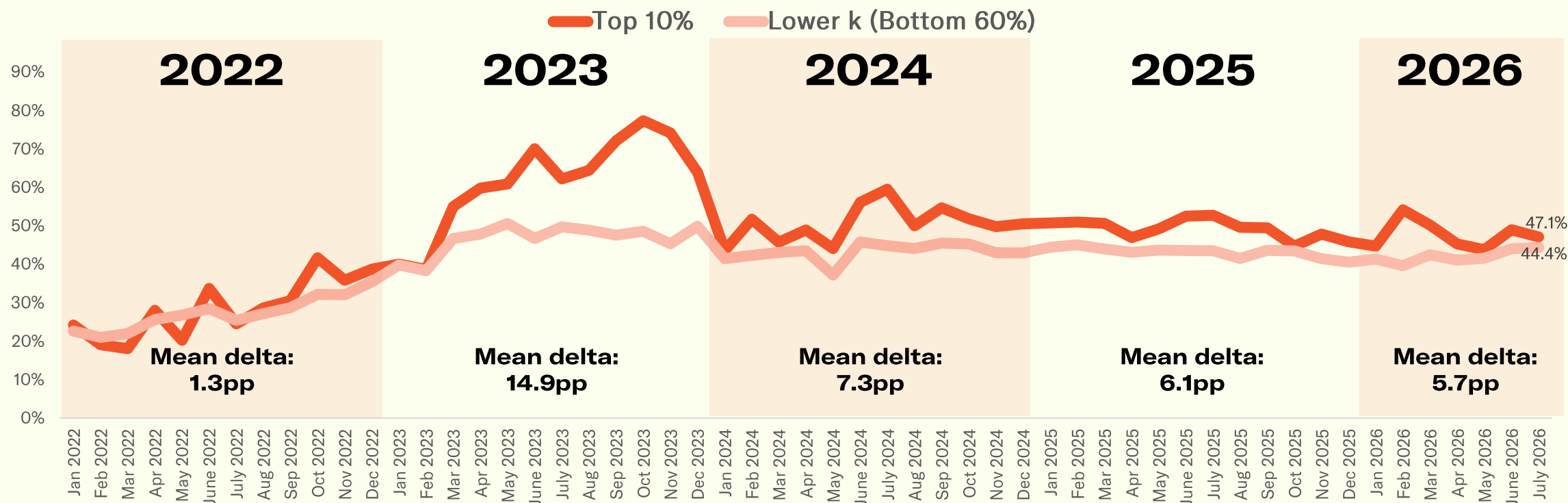
% Traveled to Attend a **Sporting Event** (Past 12 Months)



The two groups are closer to parity on past trips taken to attend a festival/special event.

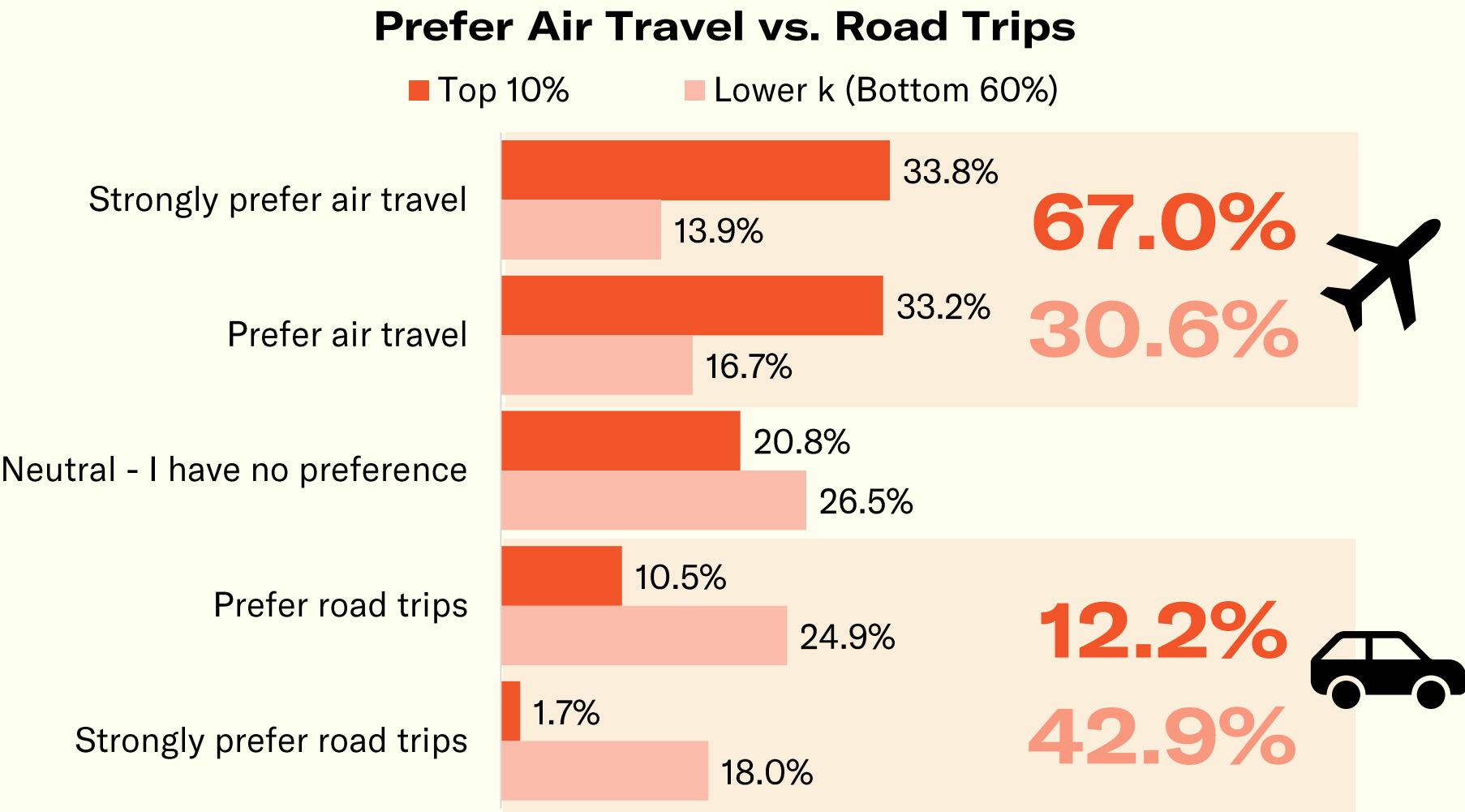
Question: In the PAST 12 MONTHS, have you traveled (50-miles or more from your home) specifically to attend a special event of any type (music festivals, other festivals, parades, charity or fundraising events, etc.)?

% Traveled to Attend a Festival/Special Event (Past 12 Months)



How Travel Barrier Gaps Translate to Behavior

Question:
Thinking about leisure travel, do you generally prefer to travel by air or automobile (i.e., road trips)?

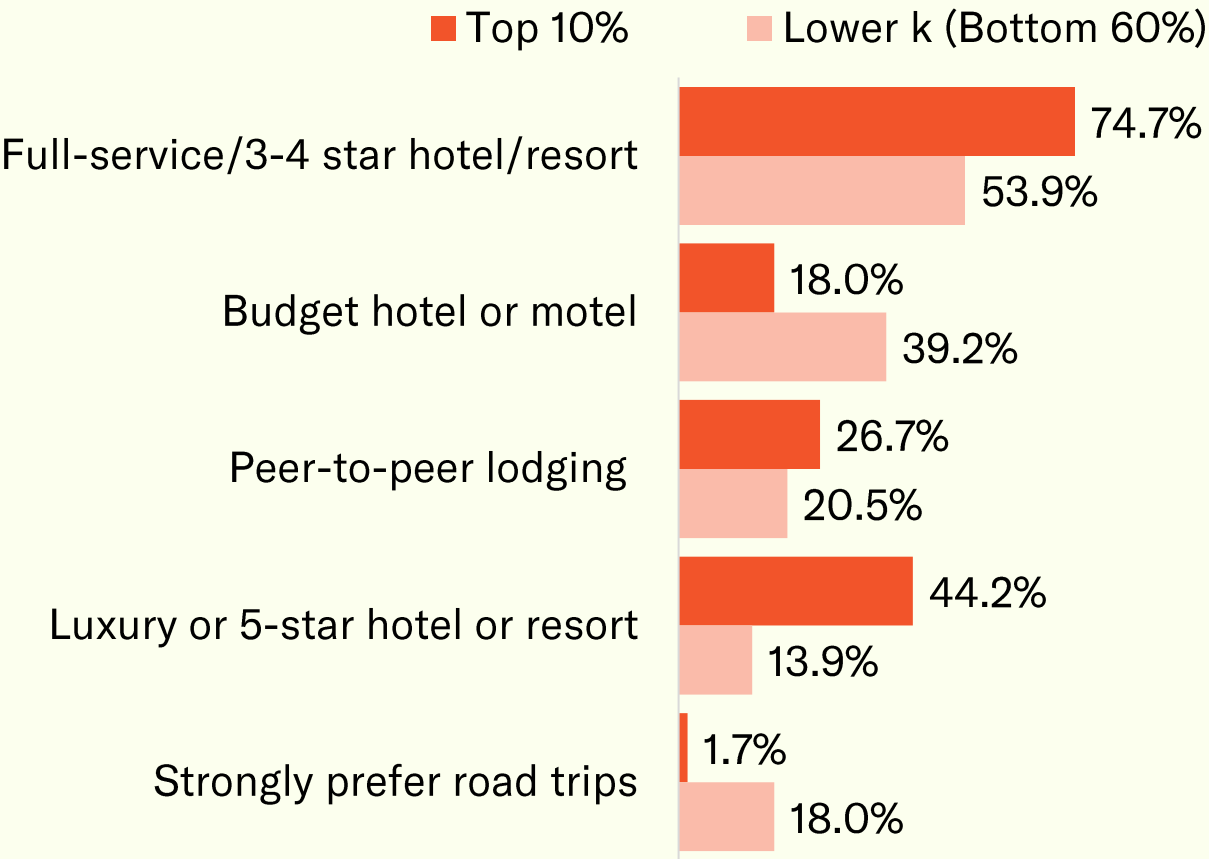


Spending, Lodging, and Planning Horizons

Question:

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

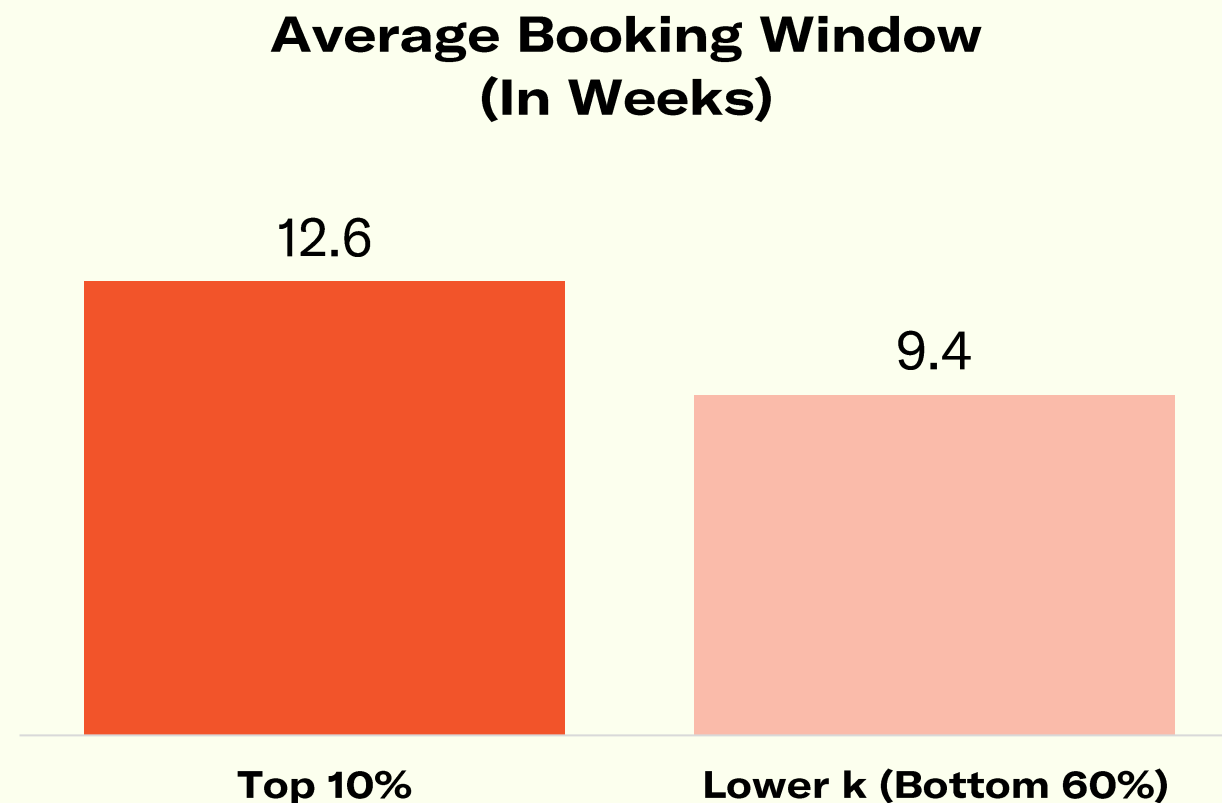
Paid Lodging Used in the Past 12 Months



Spending, Lodging, and Planning Horizons

Question:

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



Top Passions by Segment

**Lower k
(Bottom 60%)**

- 1. Food & cuisine
- 2. Visiting historical sites and attractions
- 3. Musical concerts
- 4. Shopping
- 5. Enjoying theme or amusement parks

Top 10%

- International travel
- Food and cuisine
- Visiting historical sites and attractions
- Fitness, health & wellness
- Wine

Reaching the Top 10% Earners

		Top 10%	Lower k (Bottom 60%)
	Uses online video for travel research	45.9%	35.8%
	Uses commercial guidebooks	17.2%	7.0%
	AI for travel planning	44.9%	24.7%
	Credit card points for travel	64.4%	33.2%
	DMO official website used	29.0%	19.1%

Reaching Lower k Travelers

		Lower k (Bottom 60%)	Top 10%
	Free printed guidebooks	13.8%	9.2%
	Facebook	31.6%	26.3%
	TikTok	19.6%	13.7%
	Free Streaming services	34.0%	12.2%
	Free Streaming services	19.1%	8.2%

A close-up photograph of a man and a woman sitting at a white desk, planning travel. The woman, on the left, is holding a pink smartphone. The man, on the right, is holding a black pen over an open notebook. On the desk, there is a silver camera, a black calculator, a small white toy car, a blue credit card, a stack of US dollar bills, a small cardboard house model, and a glass jar with a black lid and a label that says "TRAVEL". The background is a blurred view of green foliage.

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**We Asked Budget-constrained
Travelers...**

Key Takeaways for the K-Shaped Travelers

- 1** *American travelers who are budget constrained still view leisure trips as a necessity. They are making conscious decisions on how to spend their tightening travel budgets, so they still get that worthwhile trip without breaking the bank.*
- 2** *The Lower k segment is largely a drive-market audience. Proximity marketing, and gas/cost-reduction messaging have outsized relevance for this segment.*
- 3** *Lower k travelers are more active on Facebook and TikTok than the Top 10%, who over-index on premium research channels (commercial guidebooks, travel agents, AI).*
- 4** *Food and historical attractions appeal to both audiences, but concerts, shopping, and theme parks are big passions for the Lower k segment.*

The AI-Assisted Traveler

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Who counts as an AI-Assisted Traveler?

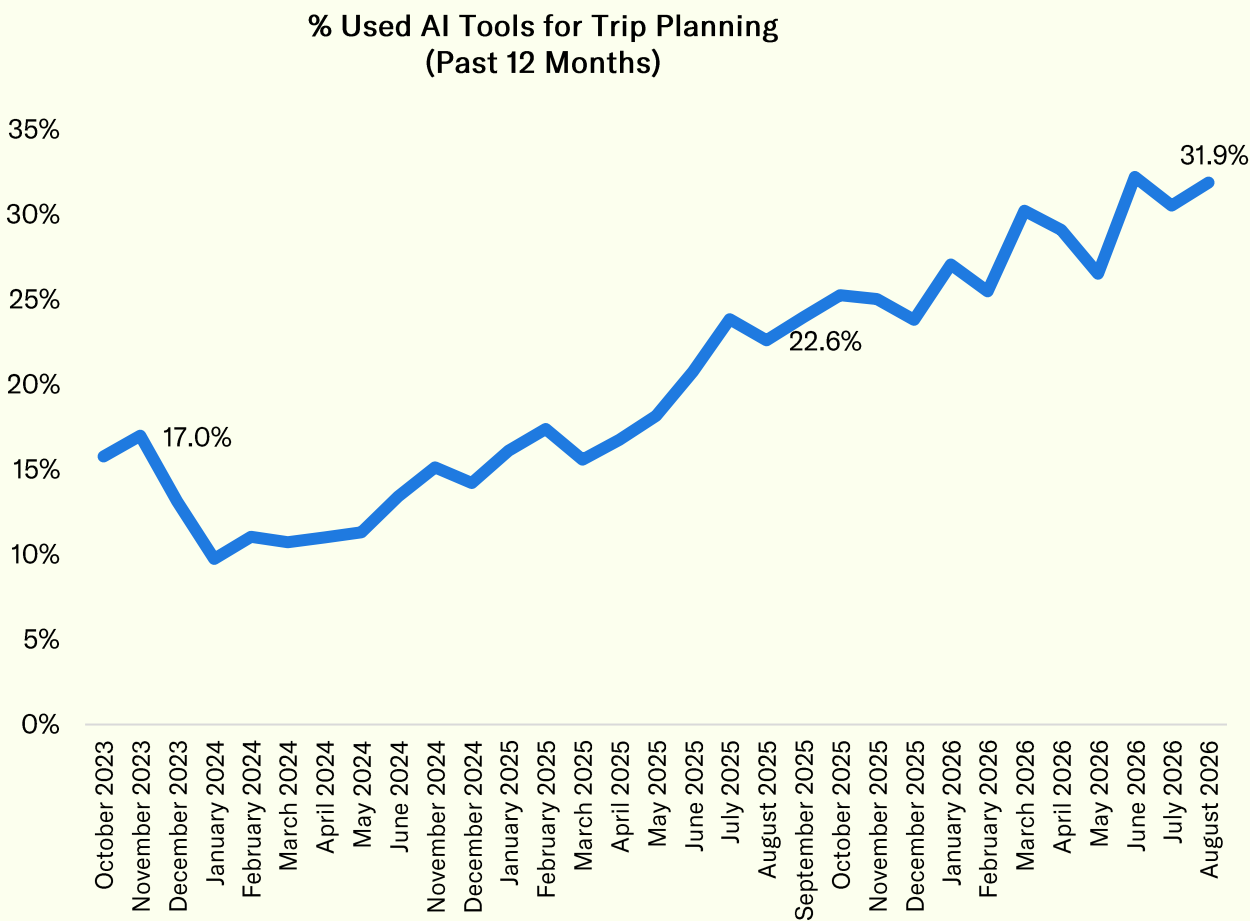
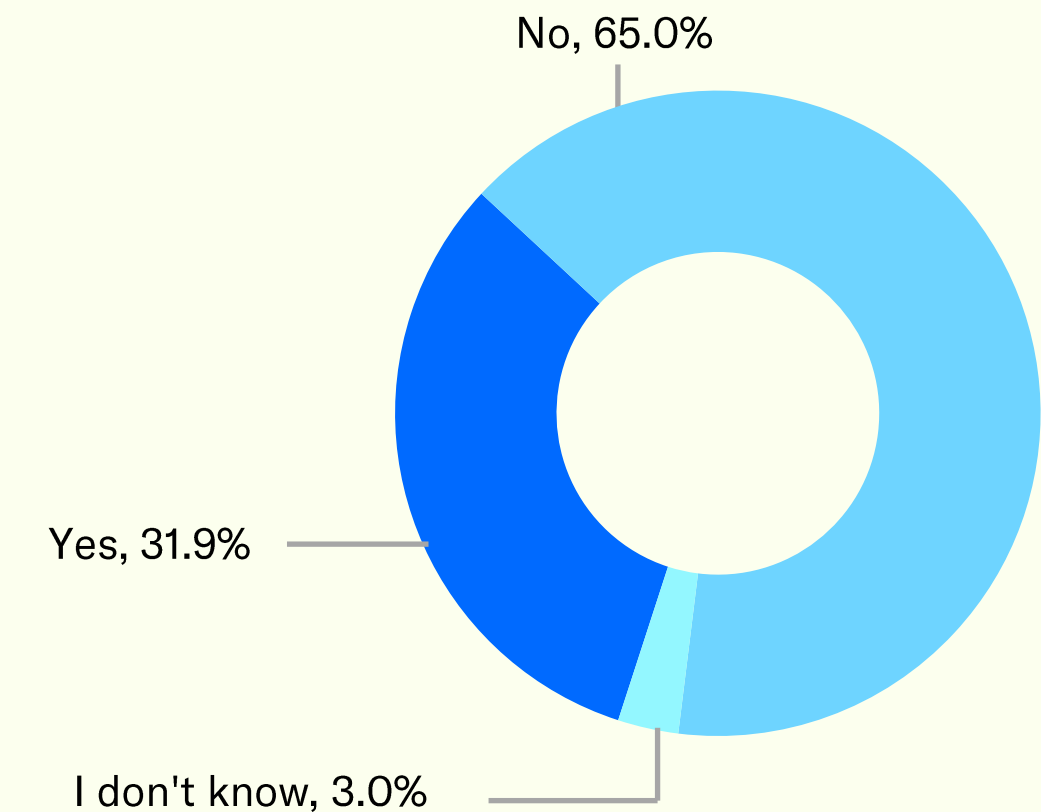
31.9%

of U.S. travelers say they
have used an **artificial
intelligence tool** to plan a
trip in the past year

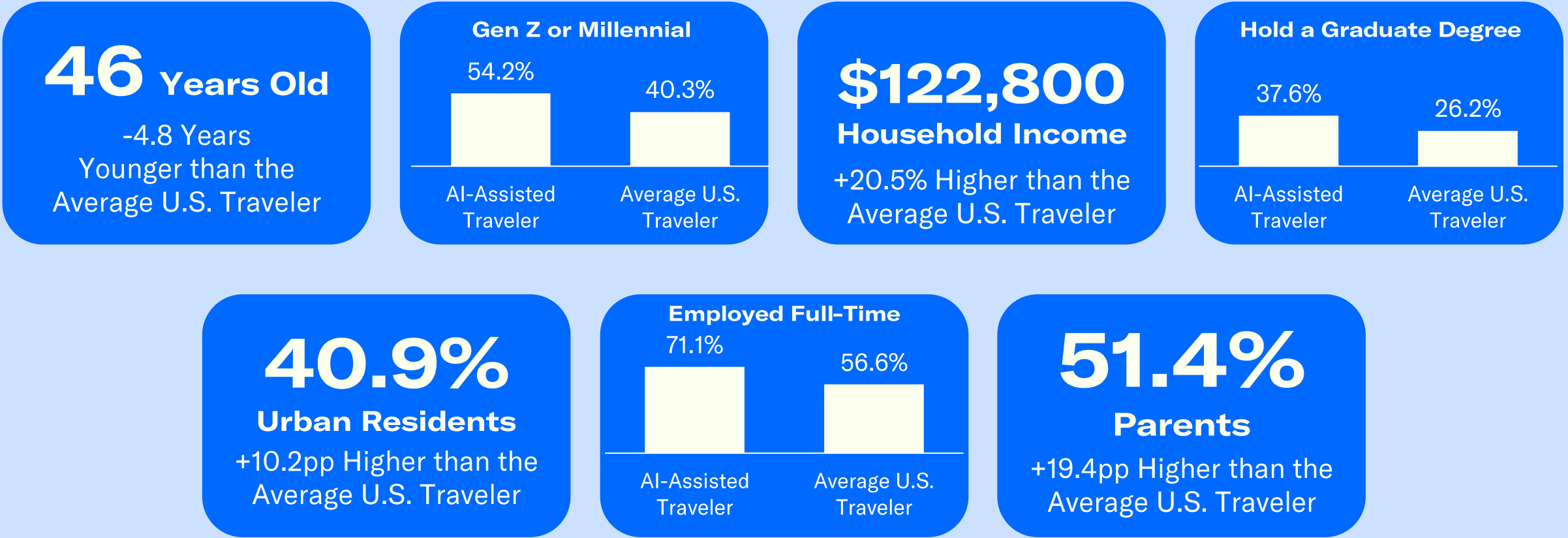


AI adoption for travel planning continues to grow

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



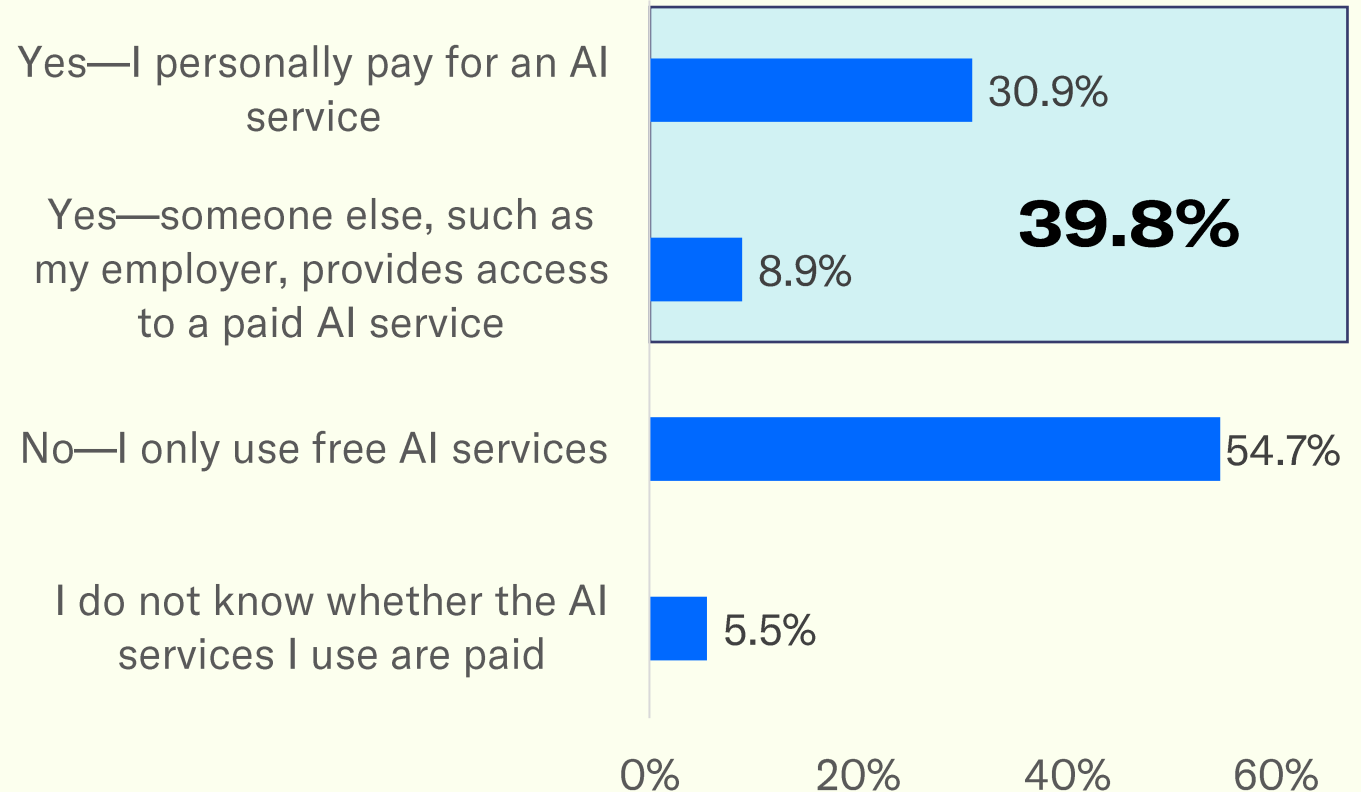
Demographic Snapshot: Younger, Wealthier, Educated, and Urban



Free AI Tools dominate as Americans' travel planning assistants.

Question:

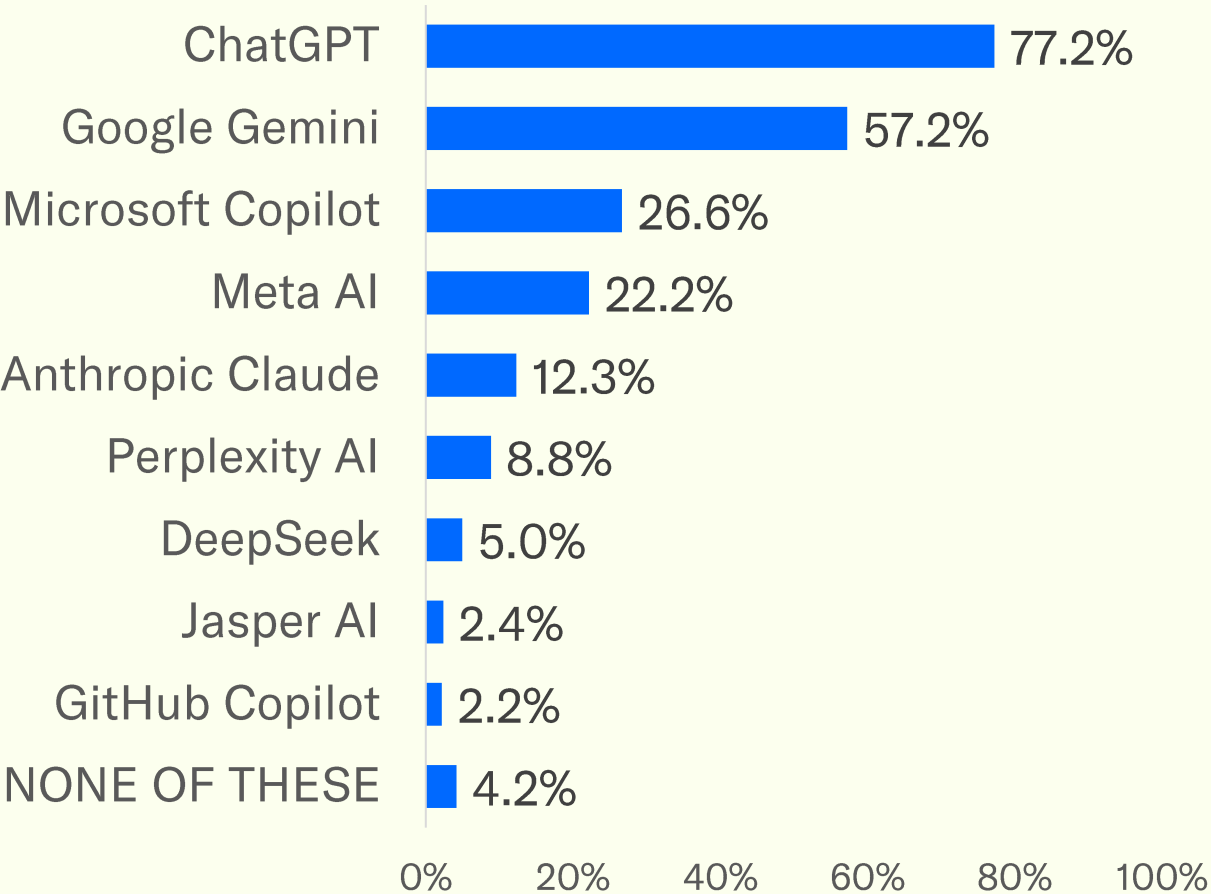
Do you currently use a PAID Artificial Intelligence (AI) service for travel planning? (This could include a paid or premium version of ChatGPT, Gemini, Claude, Perplexity or another AI service as listed in the last question.)



ChatGPT leads as the AI tool of choice for travel planning.

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.

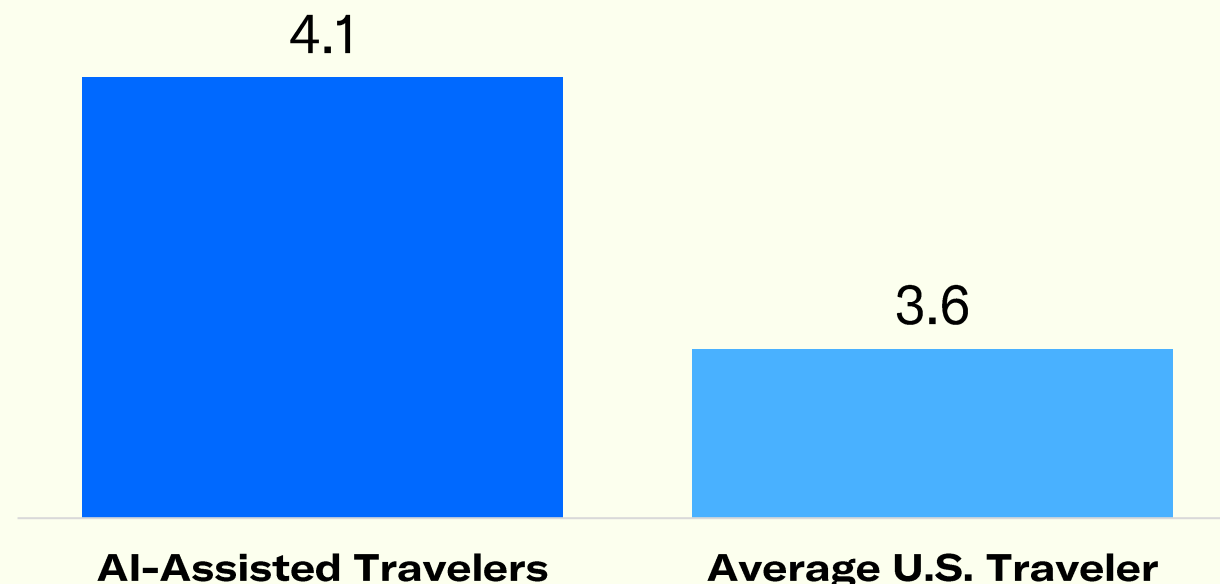


They expect to take more trips in the next 12 months compared to the average.

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?

Average Number of Expected Leisure Trips in the Next 12 Months

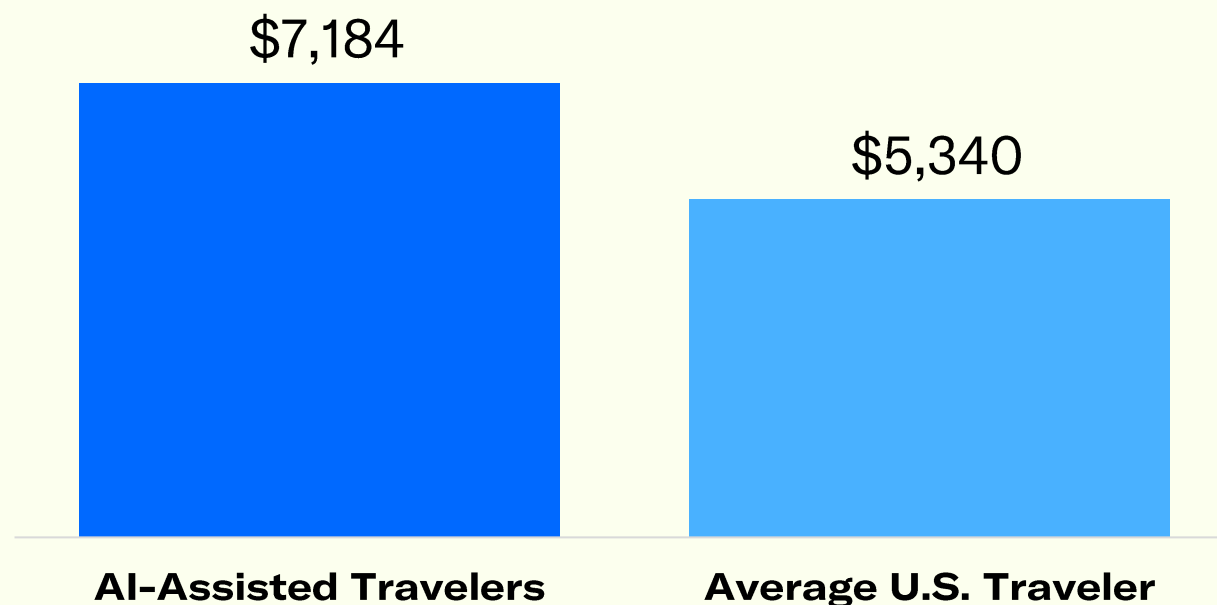


They spend more and budget is not their primary travel constraint.

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?

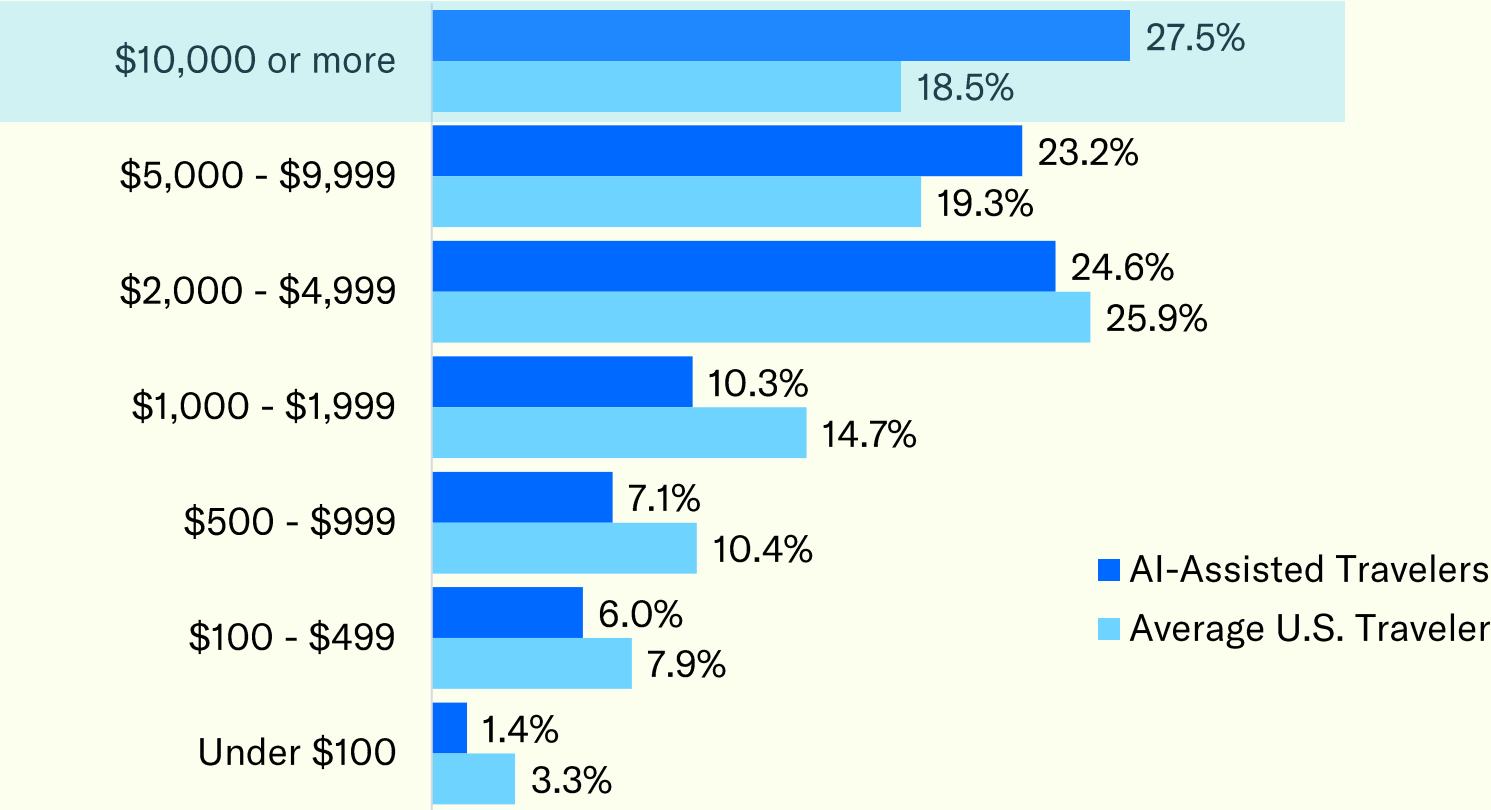
Average Maximum Annual Leisure Travel Budget in the Next 12 Months



They spend more and budget is not their primary travel constraint.

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?

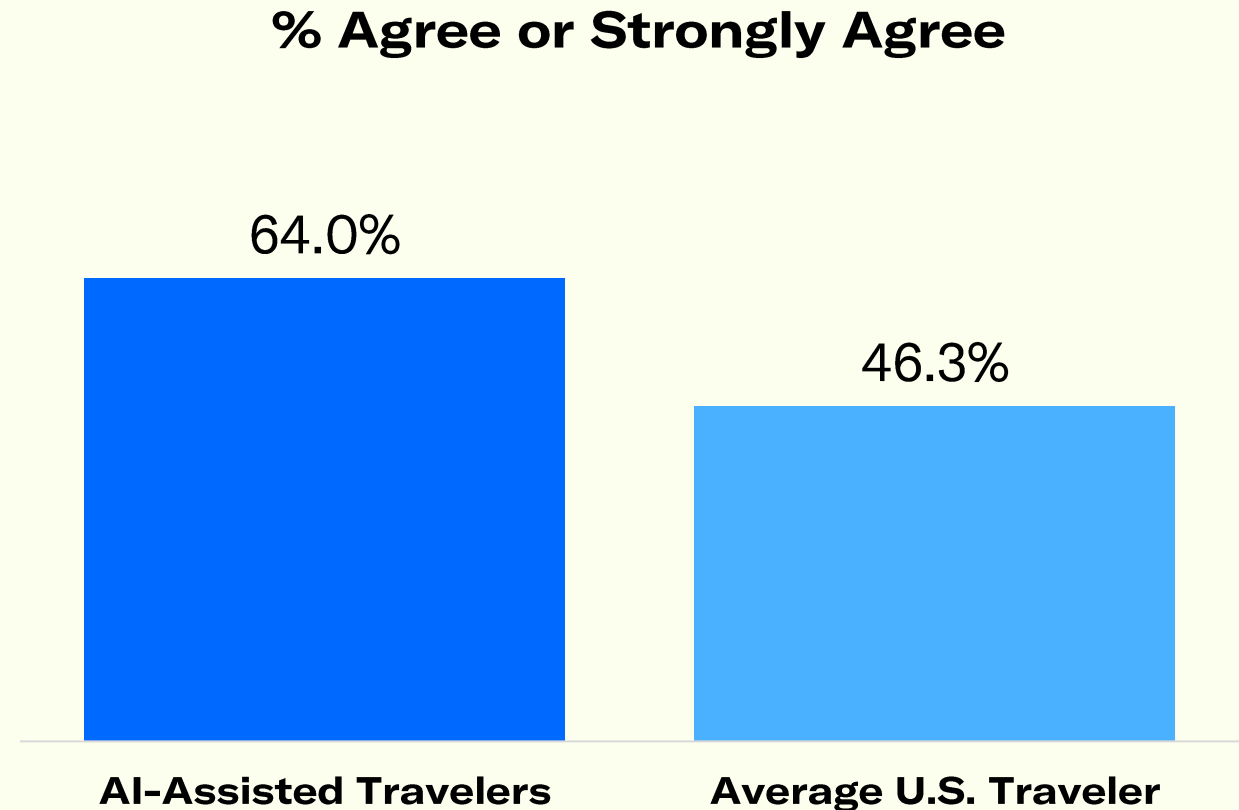
Maximum Annual Leisure Travel Budget in the Next 12 Months



Luxury experiences are a key component of their leisure trips.

Question:

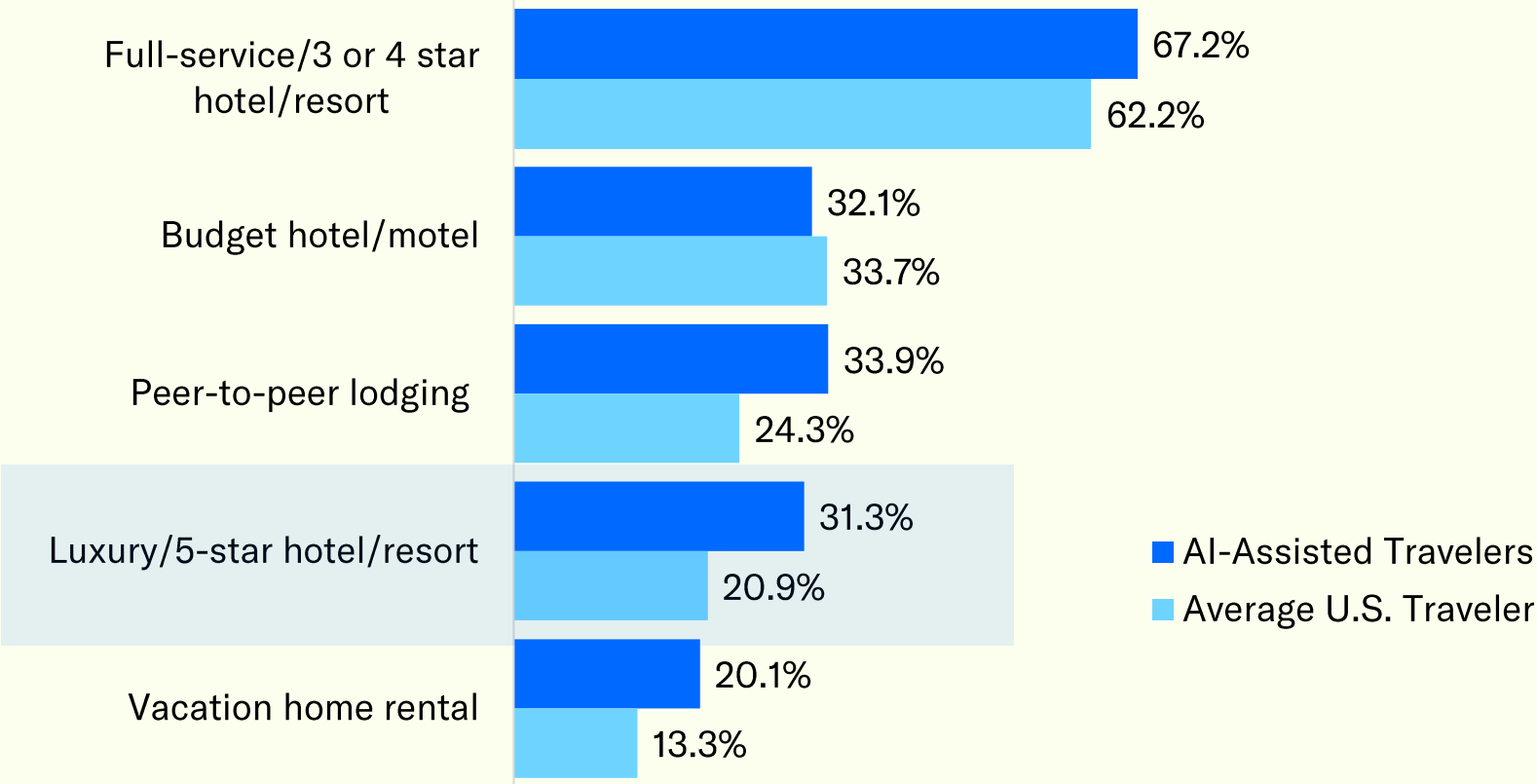
How much do you agree or disagree with this statement? Having luxury travel experiences is usually an important part of my leisure trips.



They stay in upscale hotels, but are open to alternatives.

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)

Top 5 Paid Lodging Used in the Past 12 Months

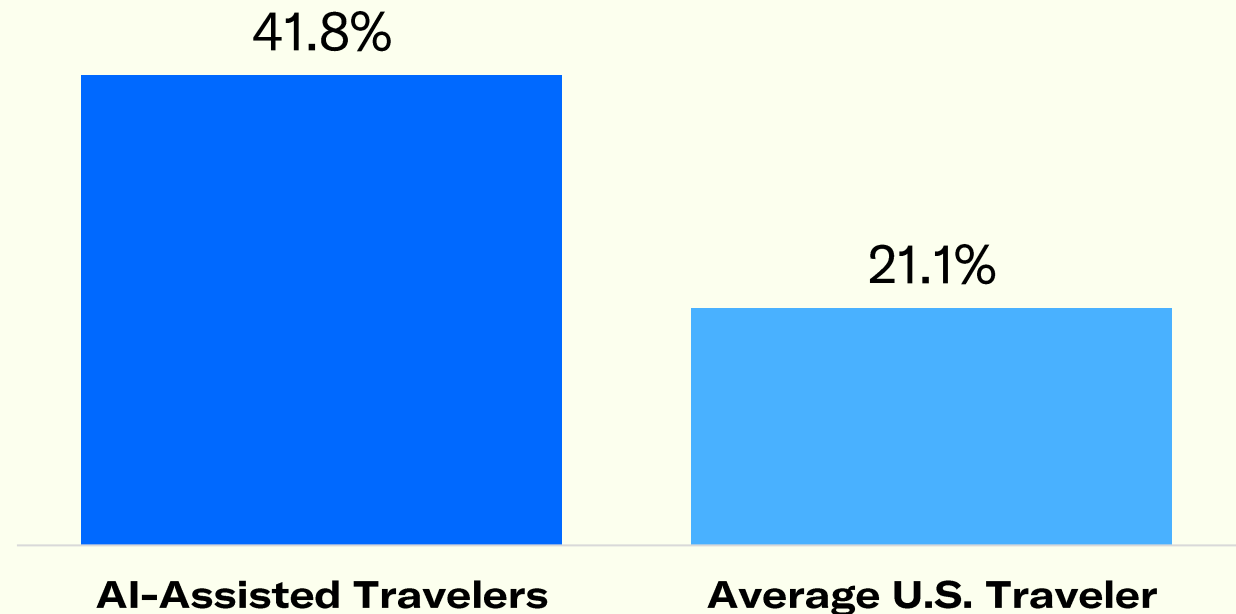


Digital influence is real for the AI-assisted traveler, who generally trusts digital voices.

Question:

In the past 12 months, have you used the opinions of a DIGITAL INFLUENCER to help plan any travel?

% Used a Digital Influencer to Plan Travel in the Past Year

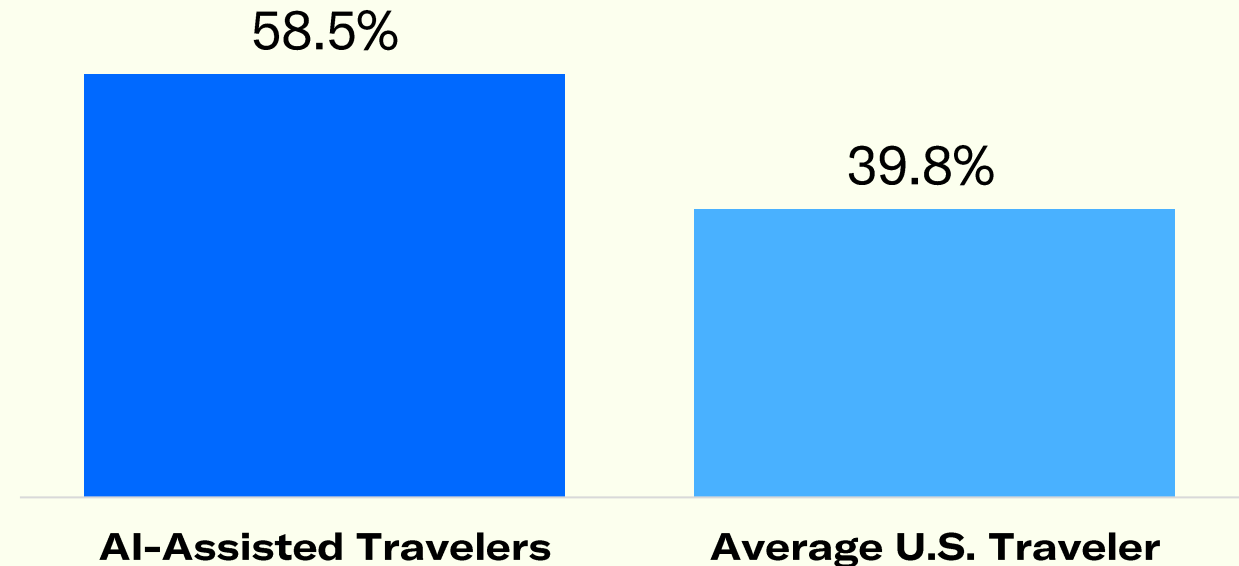


Digital influence is real for the AI-assisted traveler, who generally trusts digital voices.

Question:

Do you listen to any podcasts on a regular basis?

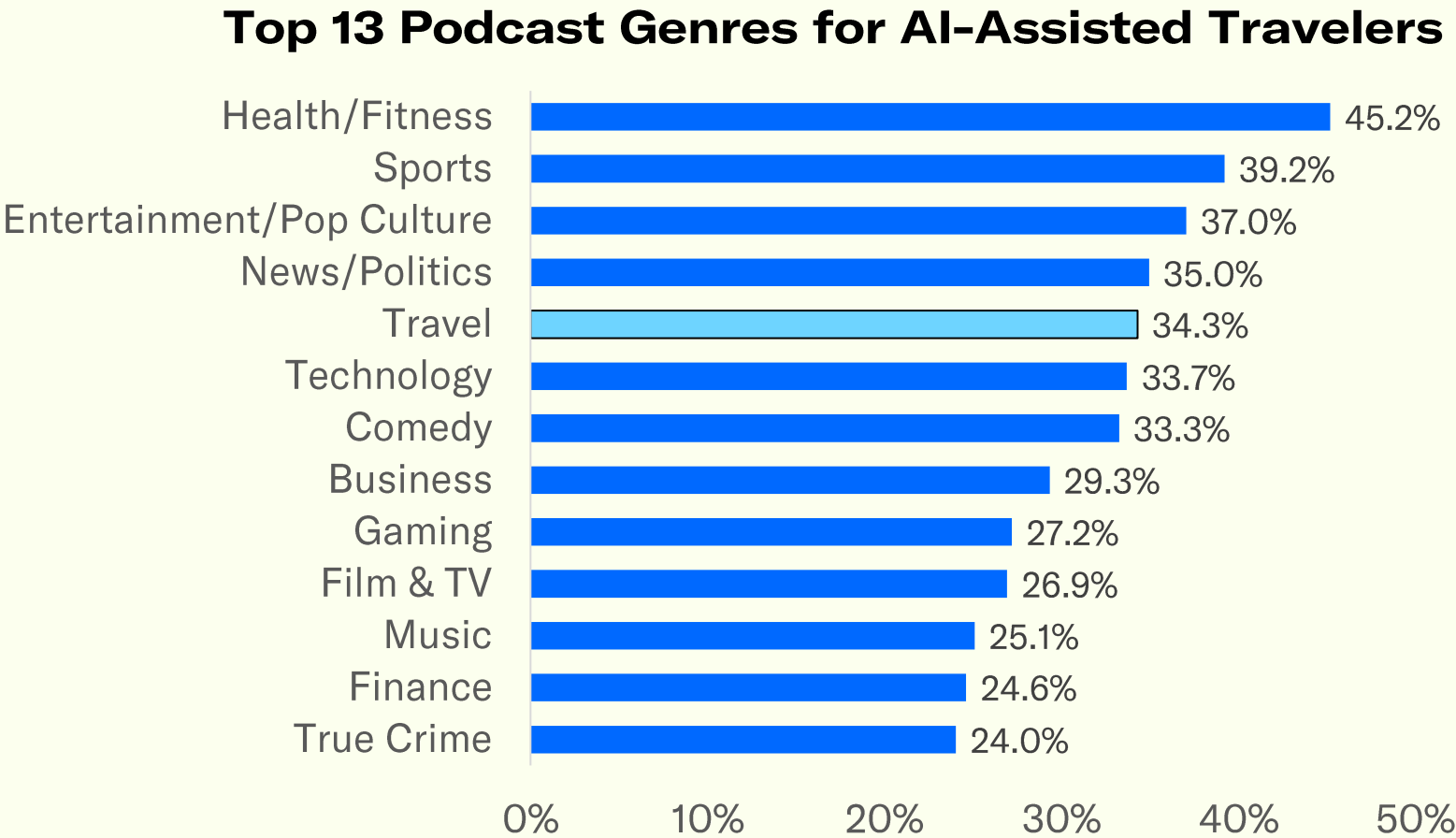
**% Listening to a podcast
on a regular basis**



Fitness, sports, pop culture, politics, and travel lead as the top podcast genres they tune into.

Question:

What podcast genres do you listen to on a regular basis? (Select all that apply)

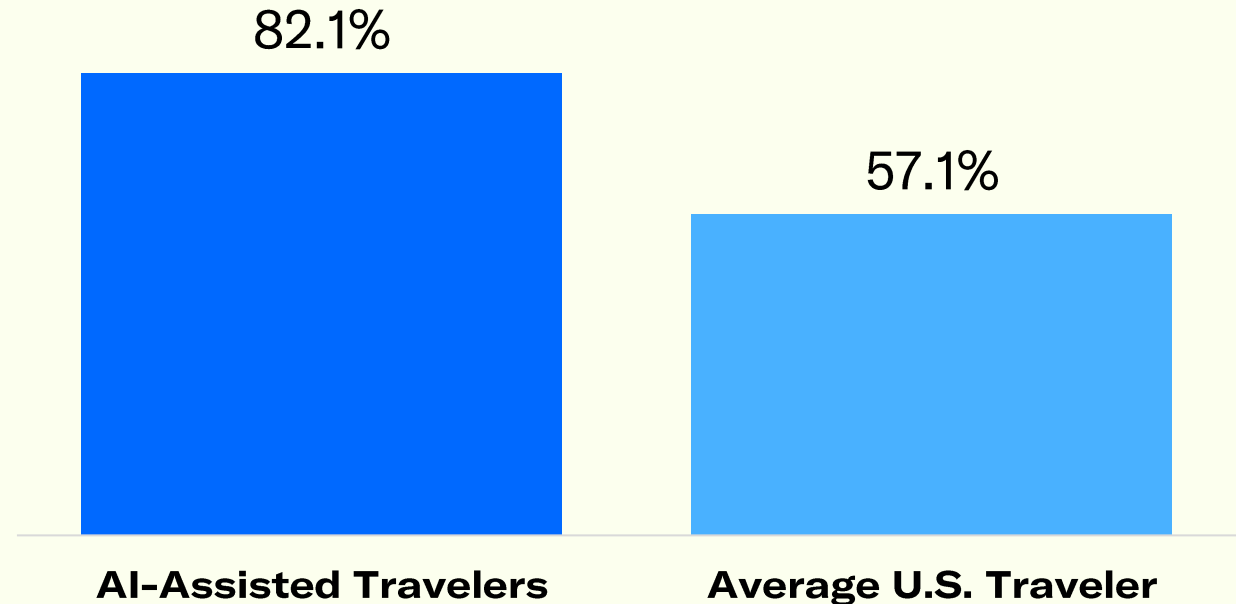


Their social media footprint is everywhere and they are more active online than average.

Question:

In the PAST 12 MONTHS, which of these resources have you used to help plan your travel?

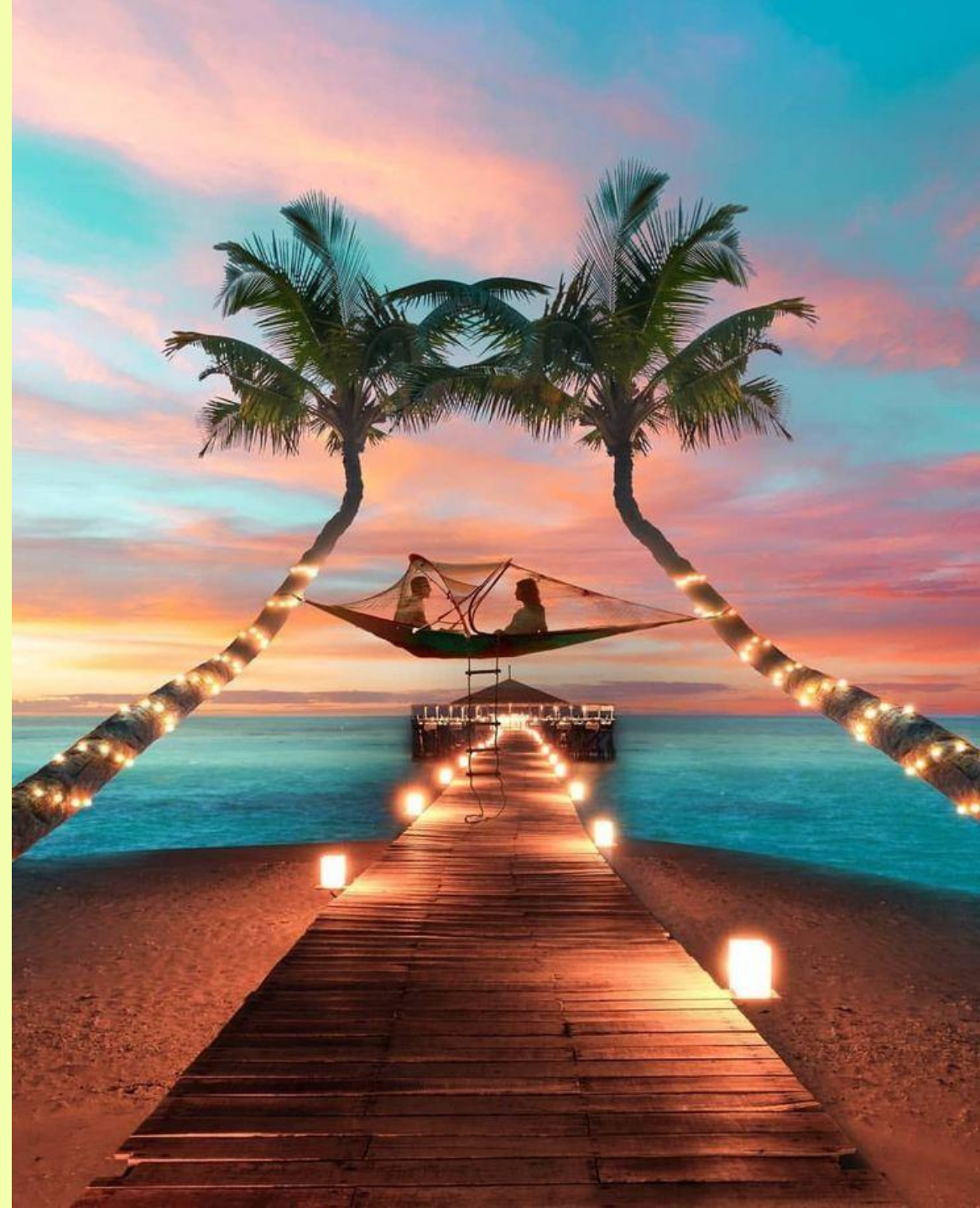
% Used Any Social Media to Plan Travel in the Past Year



Audience Poll:

What percent of **AI-Assisted Travelers** have used DMO website content to plan a trip in the past 12 months?

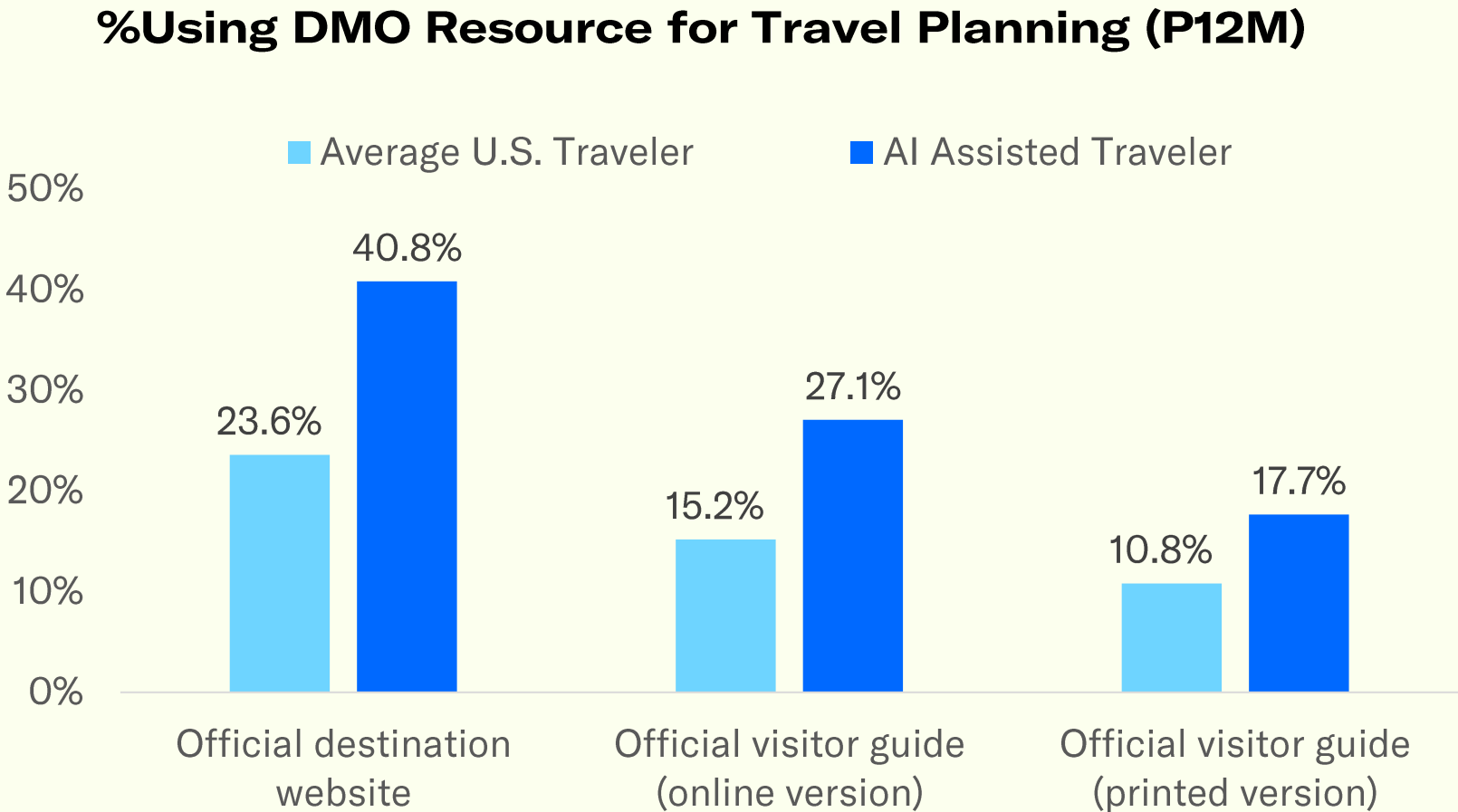
- ☐ **18%**
- ☐ **26%**
- ☐ **32%**
- ☐ **41%**



AI-Assisted Travelers use DMO resources at higher rates than the national average.

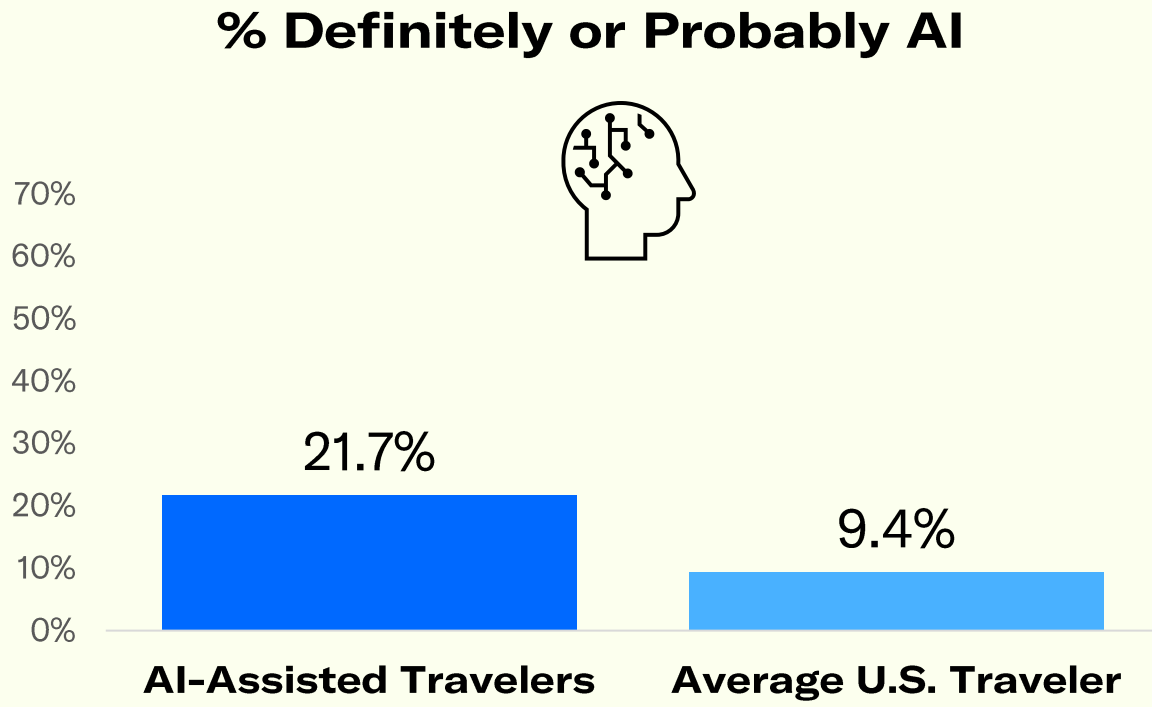
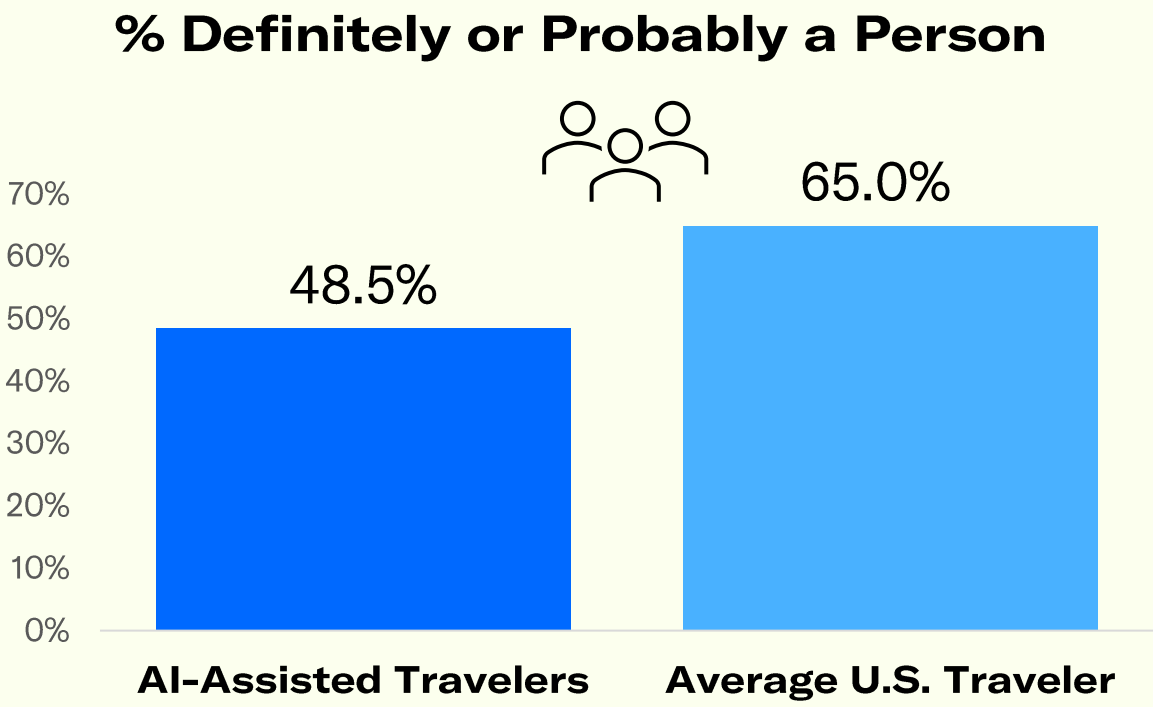
Question: In the past twelve (12) months, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel?

If so, which resources did you use?



Despite AI adoption, AI-assisted travelers still largely put more trust in human 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)



How to Reach Them: Top Preferred Marketing Channels

YouTube

54.7%

+19.8% Higher than the
Average U.S. Traveler

Facebook

40.3%

+9.5% Higher than the
Average U.S. Traveler

Instagram

39.2%

+15.0% Higher than the
Average U.S. Traveler

Online Content/Blogs

31.3%

+9.1% Higher than the
Average U.S. Traveler

TikTok

25.9%

+8.0% Higher than the
Average U.S. Traveler

DMO Website

40.8%

+17.2% Higher than the
Average U.S. Traveler

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We Asked AI Assisted Travelers...

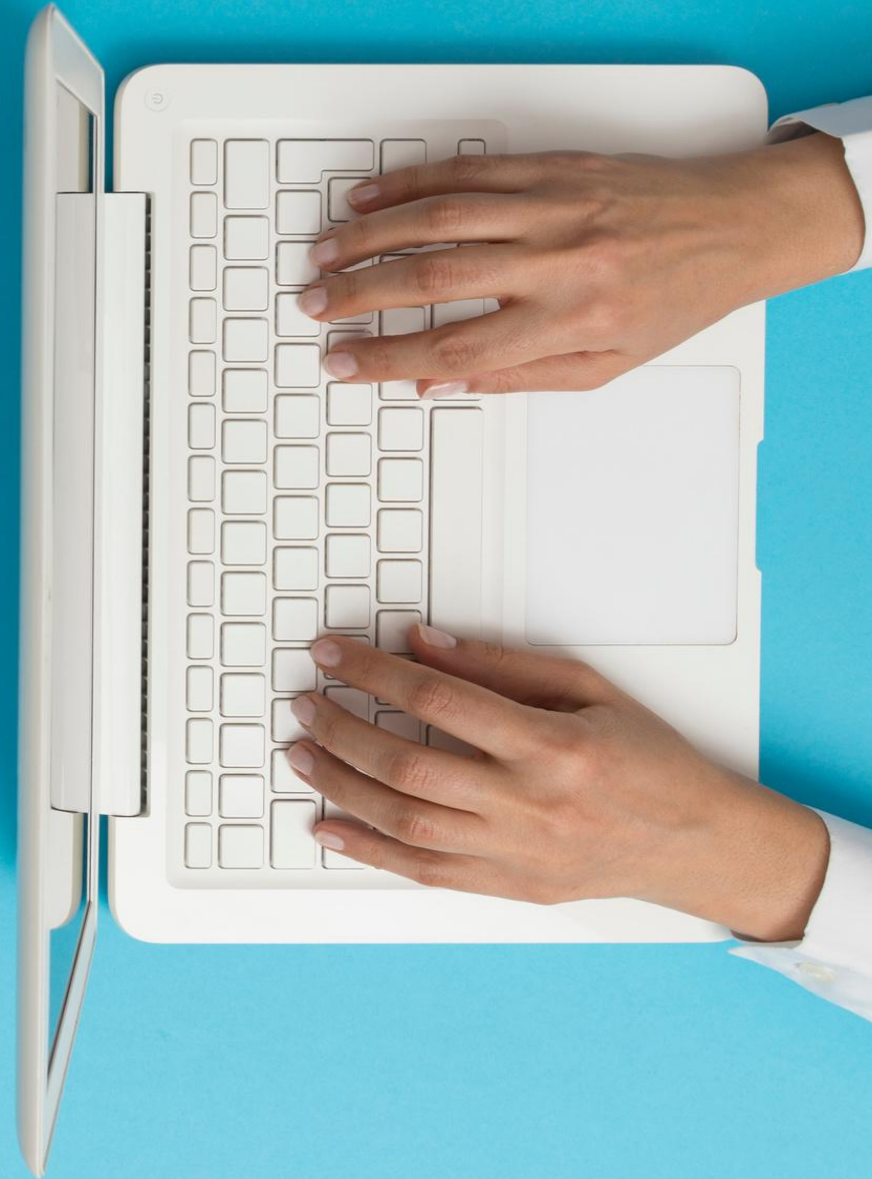
Key Takeaways for the AI-Assisted Traveler

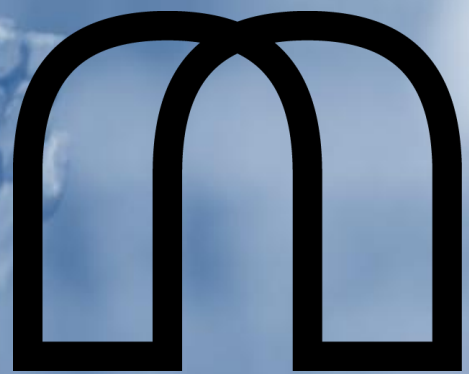
- 1 This is a high-value, high-frequency segment that travels more, spends more so they are worth prioritizing.
- 2 Influencer and video investment pays off here, with digital influencers highly over-indexing; YouTube, Instagram, and TikTok are all dominant.
- 3 AI-users are largely turning to these tools to create the contours of their trips and to surface little known, must do activities. Content to push them down to booking is still lacking.
- 4 Your DMO website absolutely matters. This resource over-indexes among these travelers. Keeping your website up-to-date in content and user experience will be a key function of ensuring you retain these travelers in the funnel.

Website Relevancy Co-op

Understanding the Role of
Travel Websites in the Age of AI

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2026 Visitor Guide Readership & Conversion Research

The Dispersal Traveler



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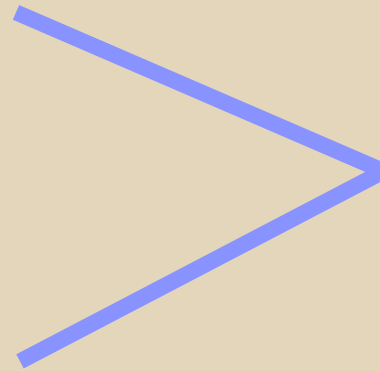
How are we defining the Dispersal Traveler?

26.1%

of U.S. travelers say they have
*gone out of their way to explore
less-known destinations* on trips
taken in the past 2 years

39.5%

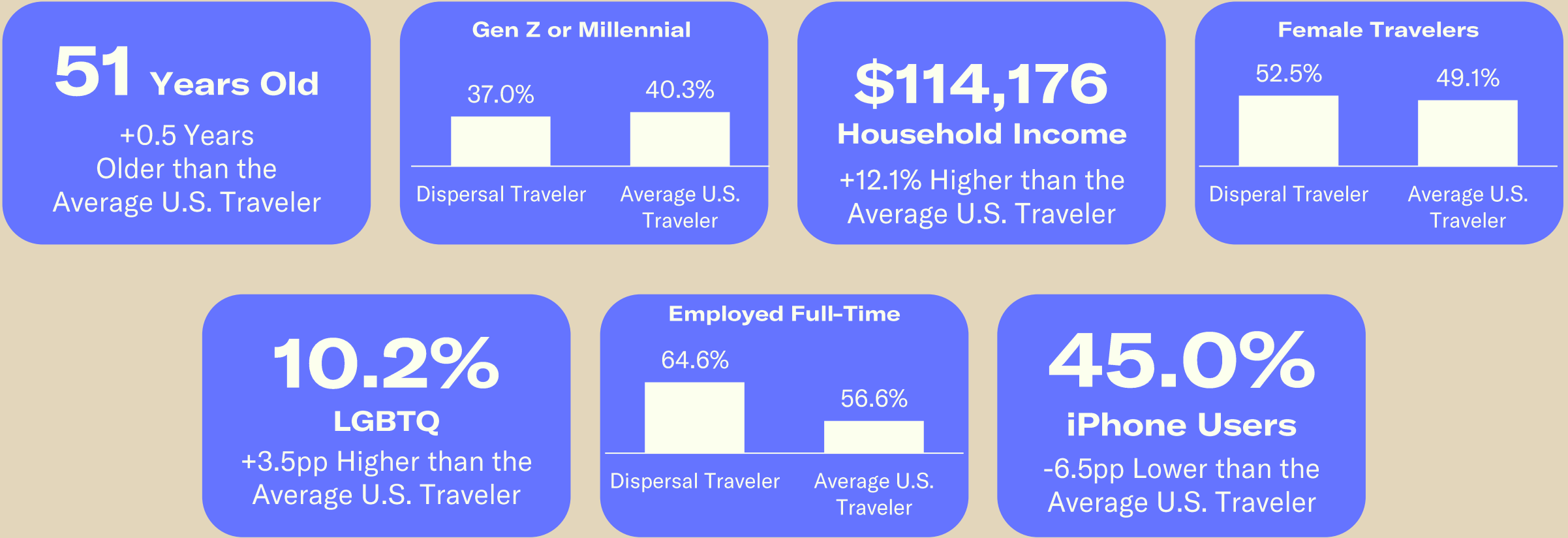
of U.S. travelers say they *prefer to
travel during off-seasons for
leisure*



3.0%

**Of the total
Traveling
Population**

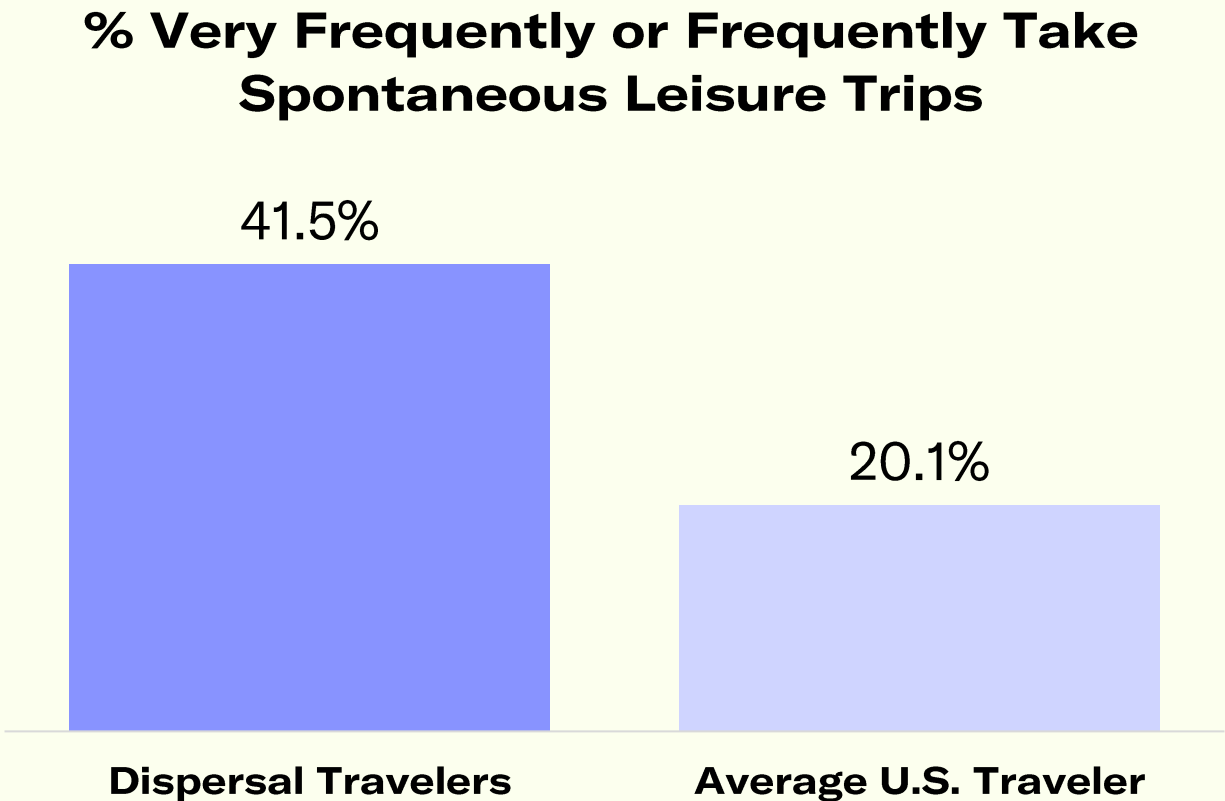
Demographic Snapshot: Older, Better-Off but Not Ultra-Wealthy



The Dispersal Traveler is a Free-Spirited Explorer

Question:

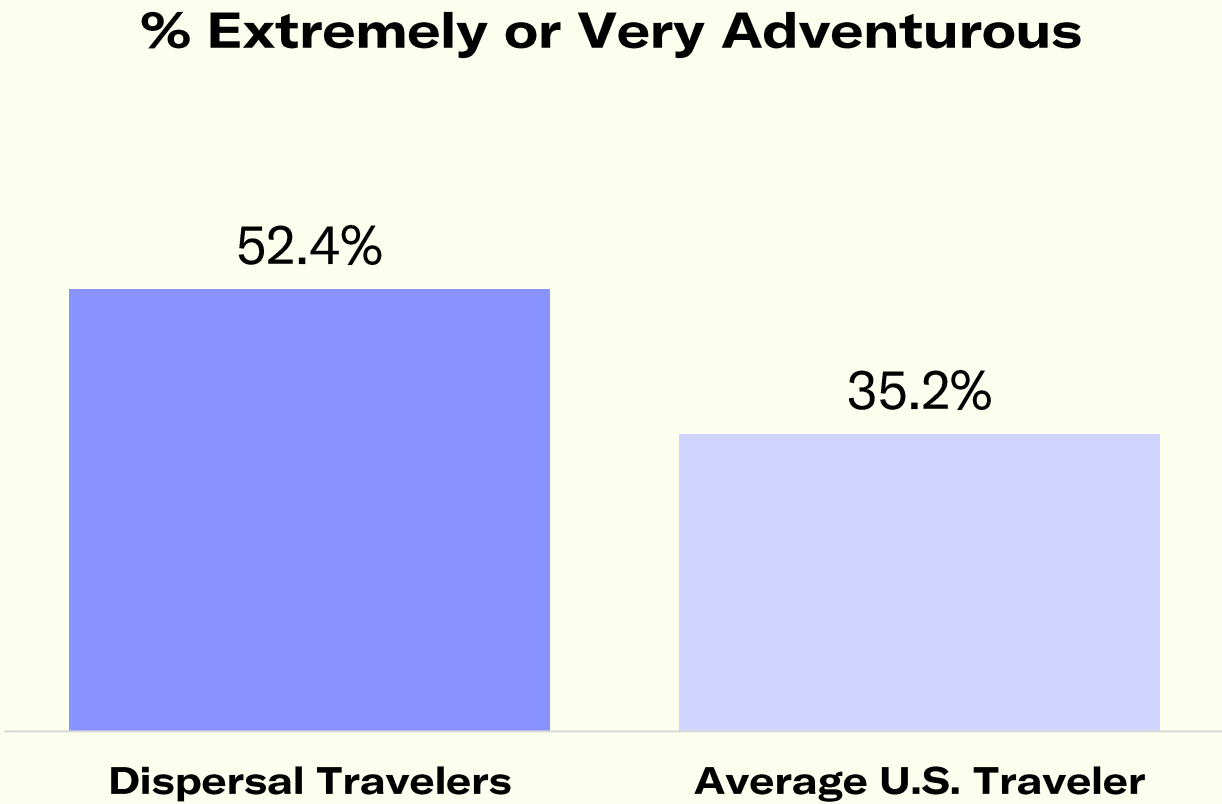
How often do you take spontaneous leisure trips (i.e., trips sparked by impulse which begin soon after the idea arises)?



The Dispersal Traveler is a Free-Spirited Explorer

Question:

How adventurous do you consider yourself to be while traveling?

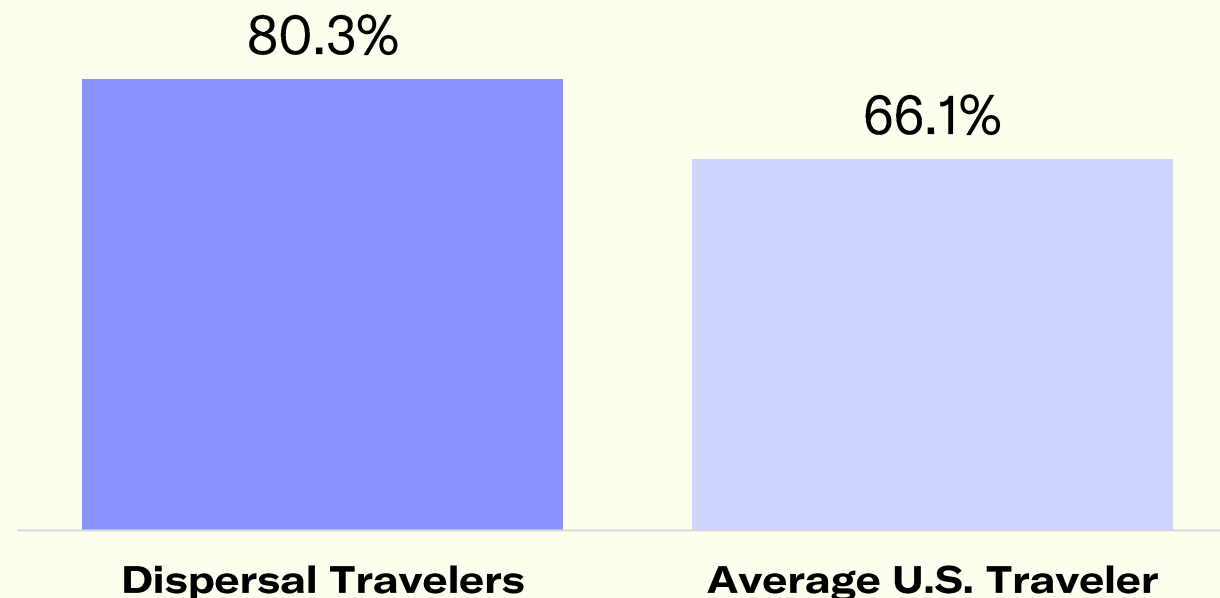


The Dispersal Traveler is Wellness-Driven

Question:

Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being?

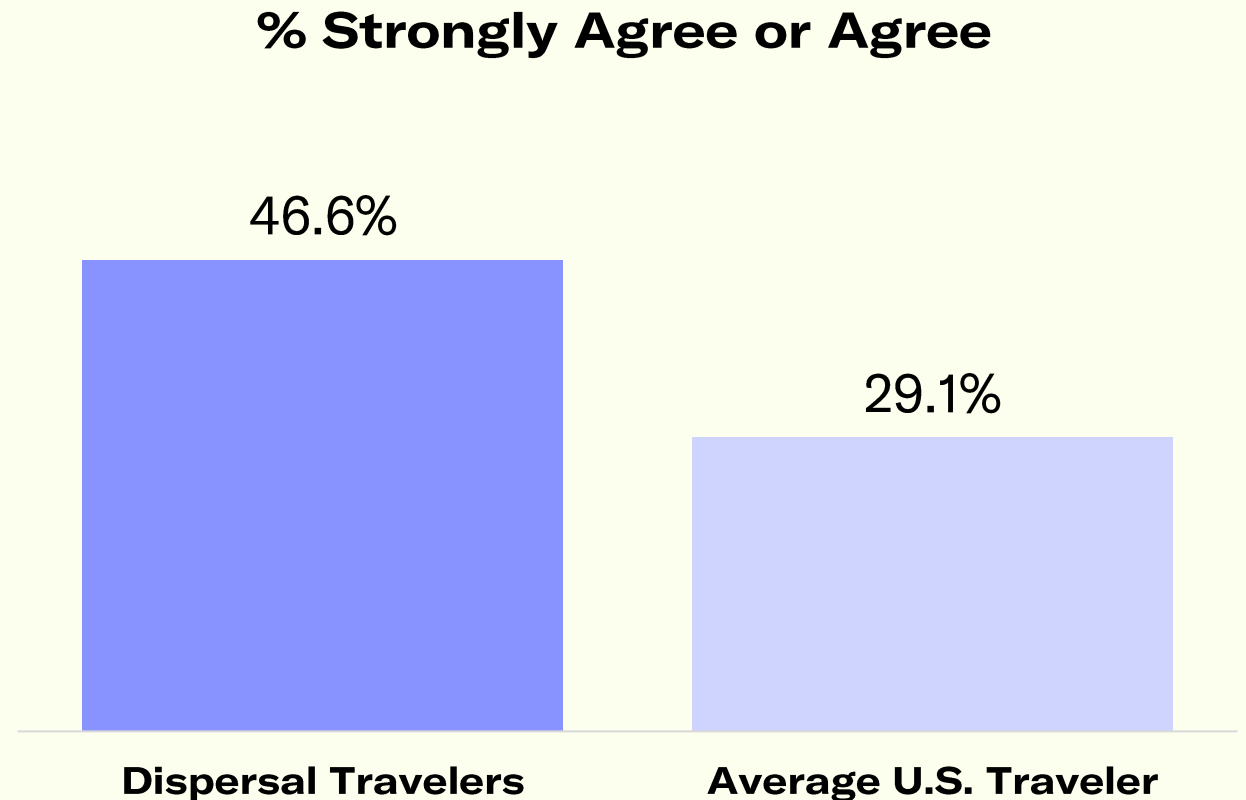
% Leisure Travel is Important to their Well-Being



The Dispersal Traveler is Committed to Sustainability

Question:

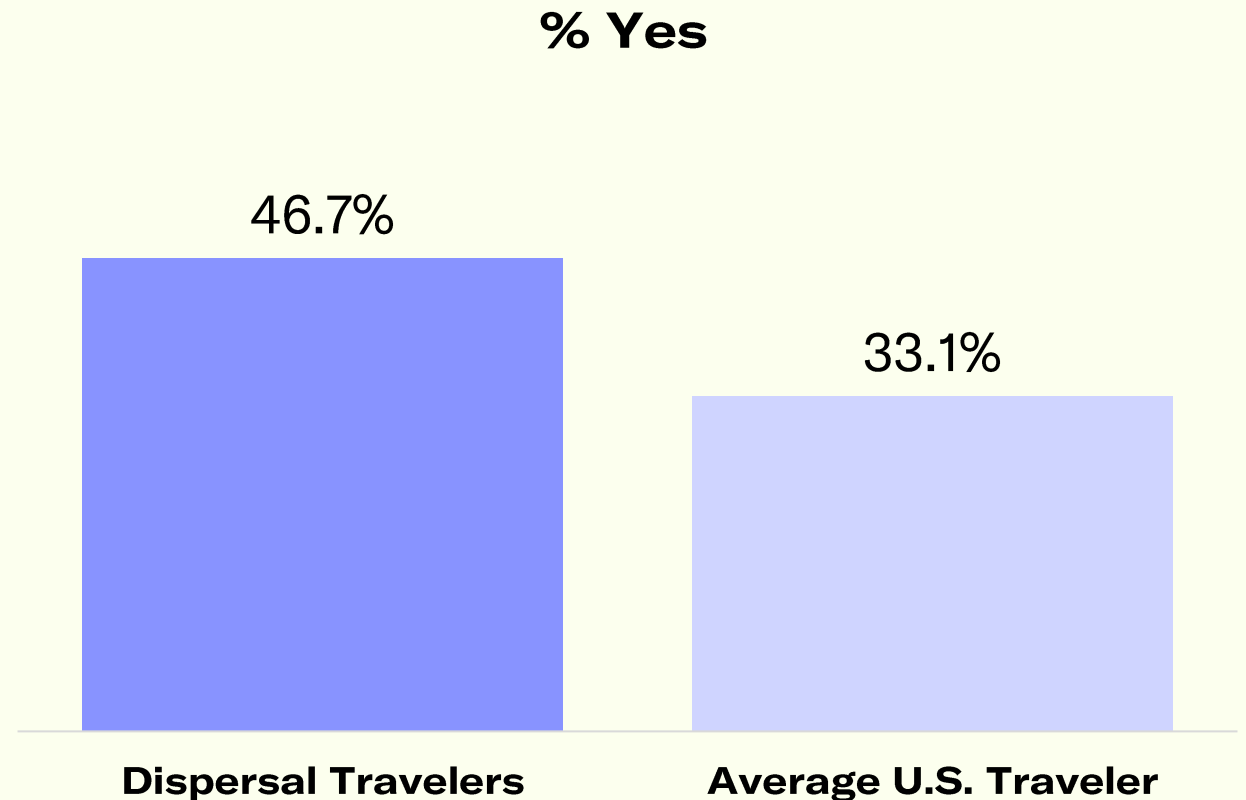
In the NEXT TWELVE (12) MONTHS, I'll be more proactive in reducing the impact of my travel on the environment.



The Dispersal Traveler Tend to Be Solo Travelers

Question:

Solo leisure travel is when someone goes on a leisure trip by themselves, without friends or companions. In the PAST 12 MONTHS, have you taken a solo leisure trip?

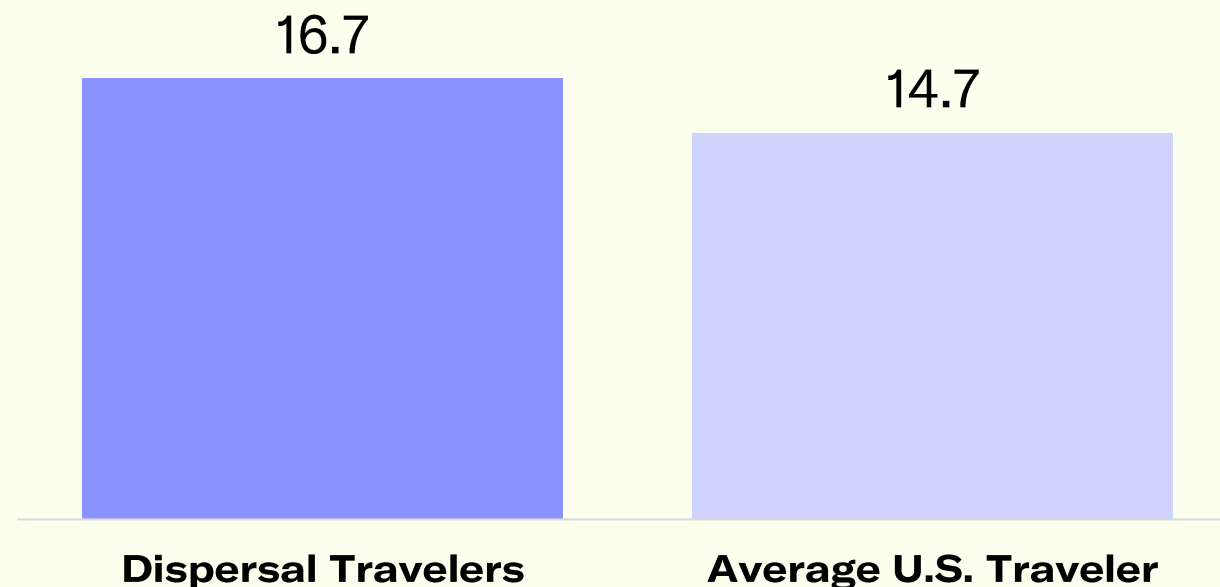


They are Active, Committed Travelers

Question:

Realistically, how many days will you have available for leisure travel in the NEXT TWELVE (12) MONTHS?

Average Number of Days Available for Leisure Travel in the Next 12 Months

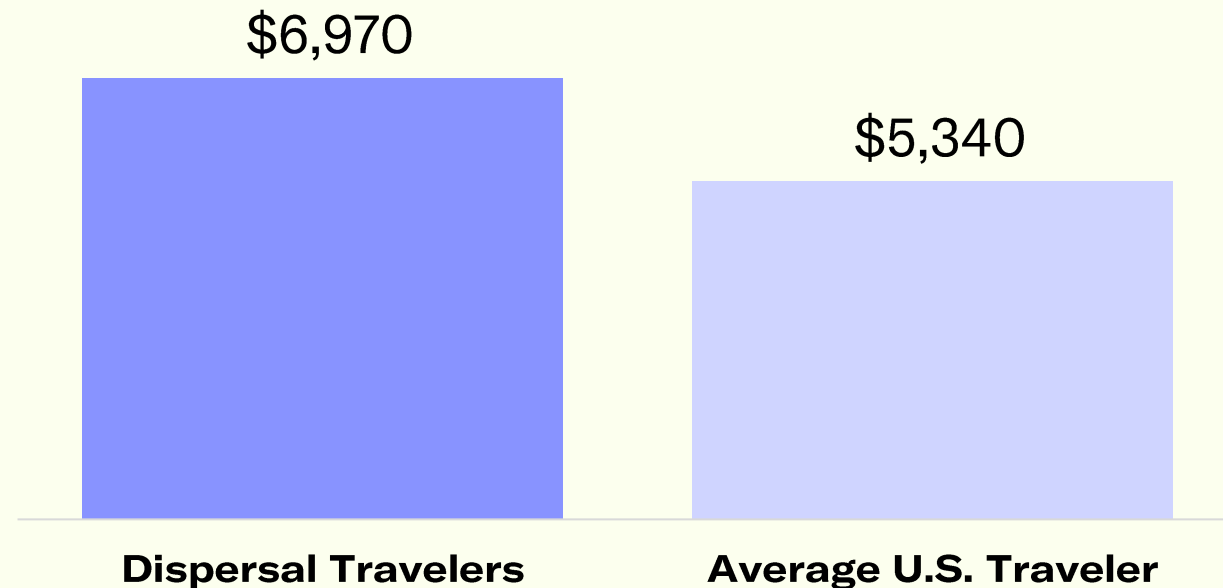


They are Active, Committed Travelers

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?

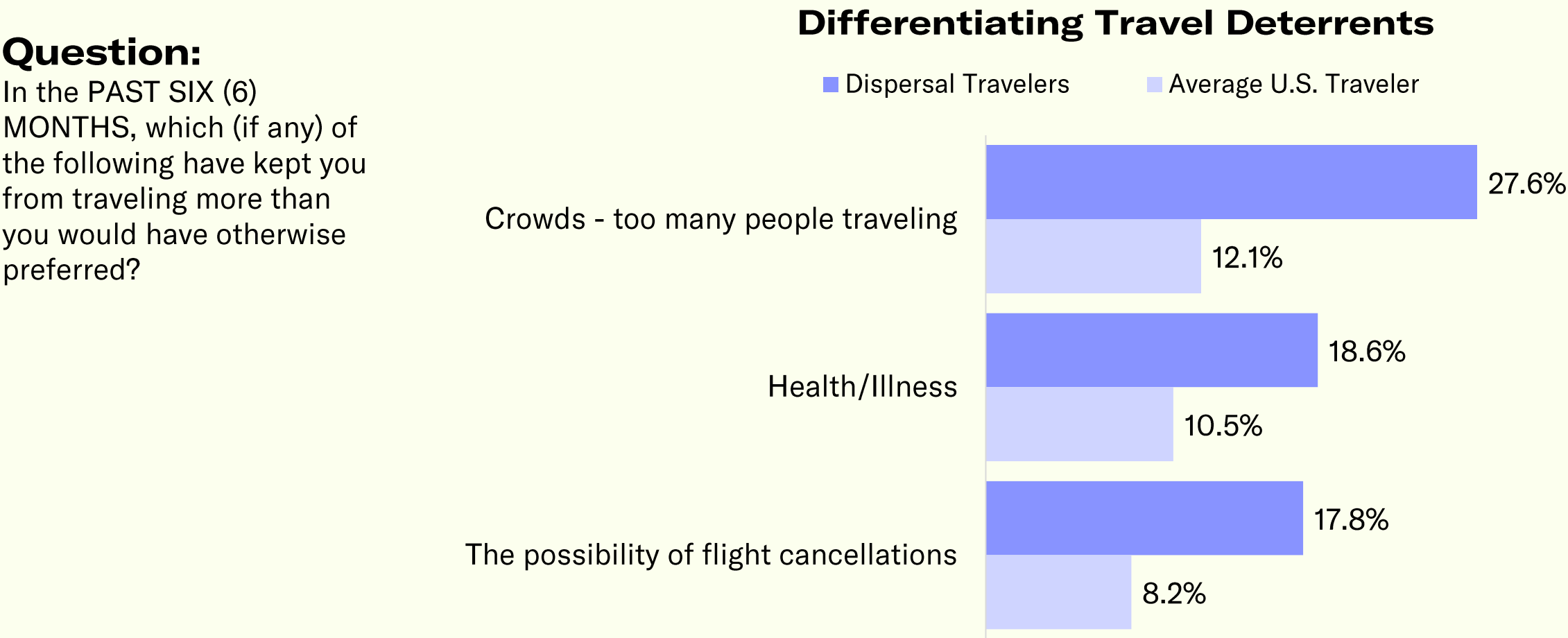
Average Maximum Annual Leisure Travel Budget in the Next 12 Months



Their Most Differentiating Travel Barriers are Logistical and Health-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?

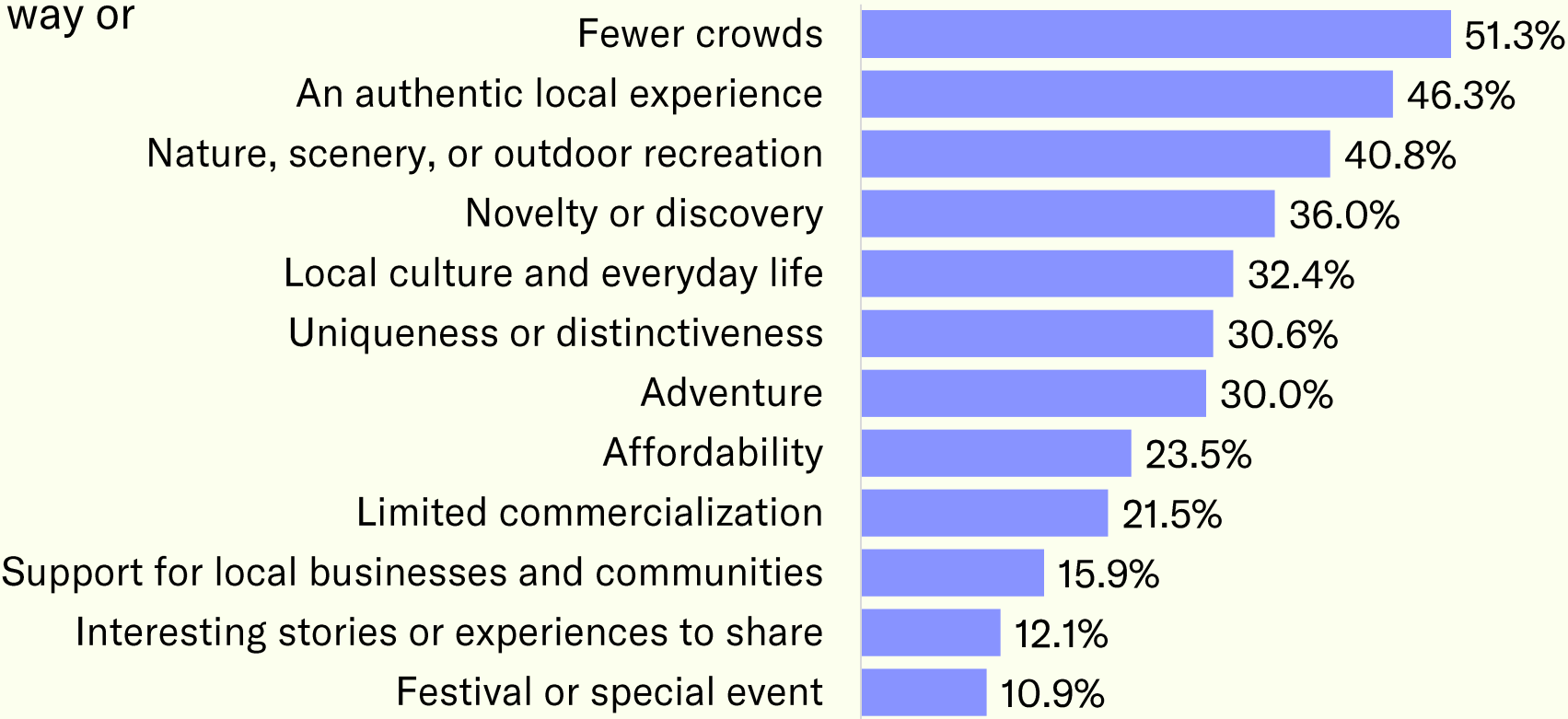


They're Seeking Fewer Crowds, Authenticity, and the Chance to Connect with Nature

Question:

Which were important to why you decided to visit this out of the way or lesser-known destination?

Factors Driving Their Decision to Visit a Lesser-Known Destination

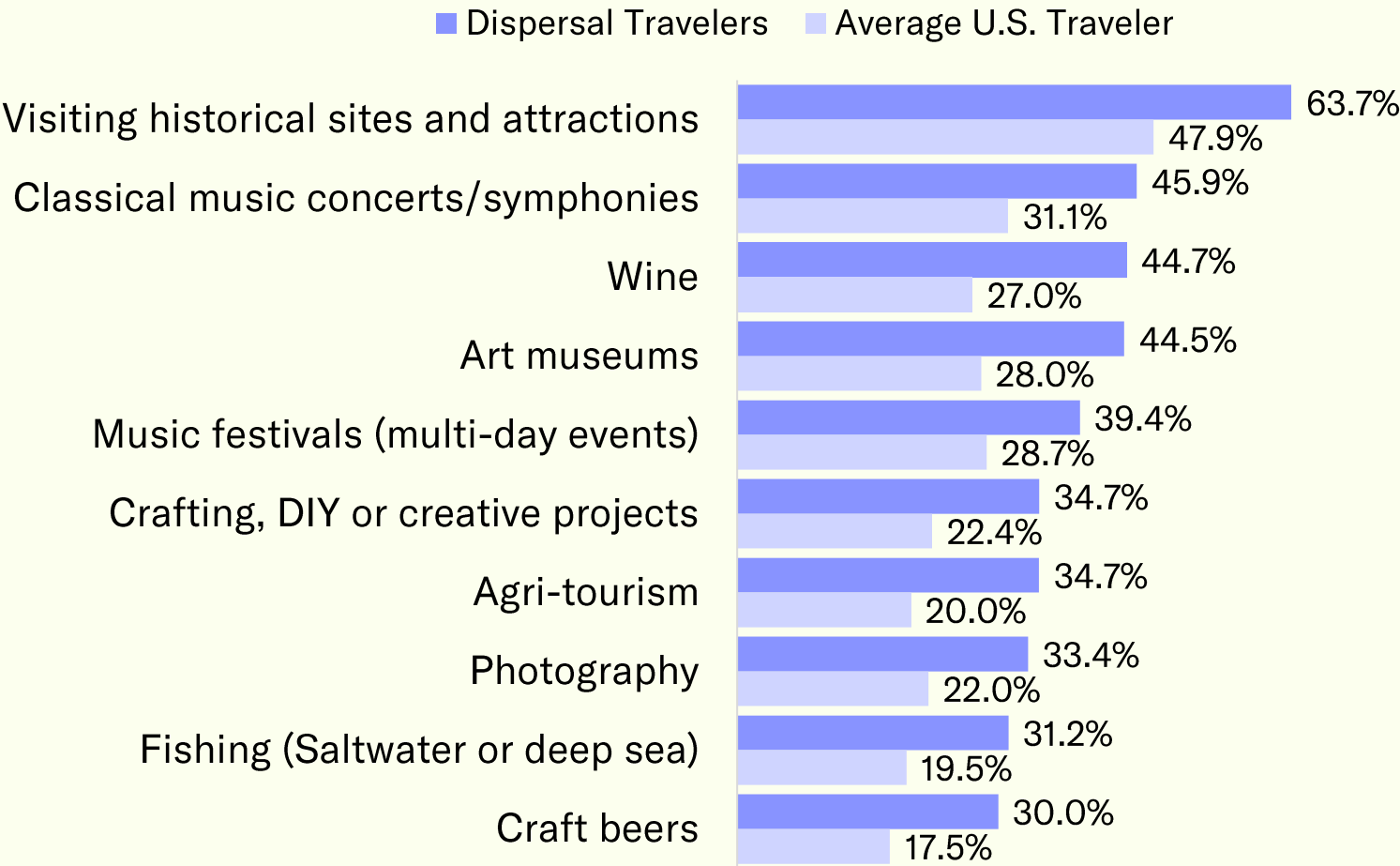


They Over-Index on Culture, History, and Sensory Experiences

Question:

Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

Top Differentiating Hobbies



Distinct from AI-Assisted Travelers, They are More Traditional, Curated, and Trust-Based

Question:

In the PAST 12 MONTHS, which of these resources have you used to help plan your travel?

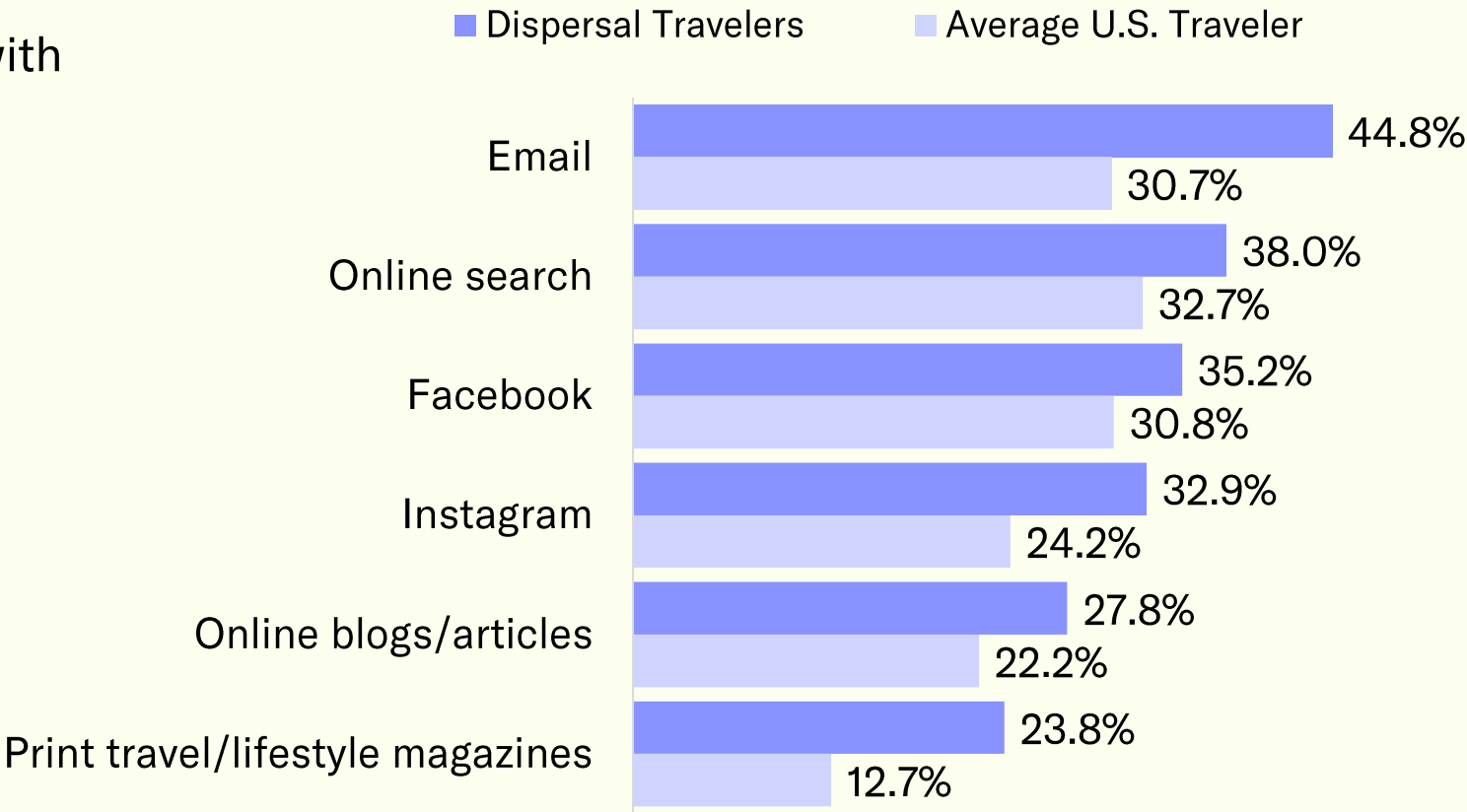


They Seek Editorial Content Through More Analog Channels Than Other Segments

Question:

Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit?

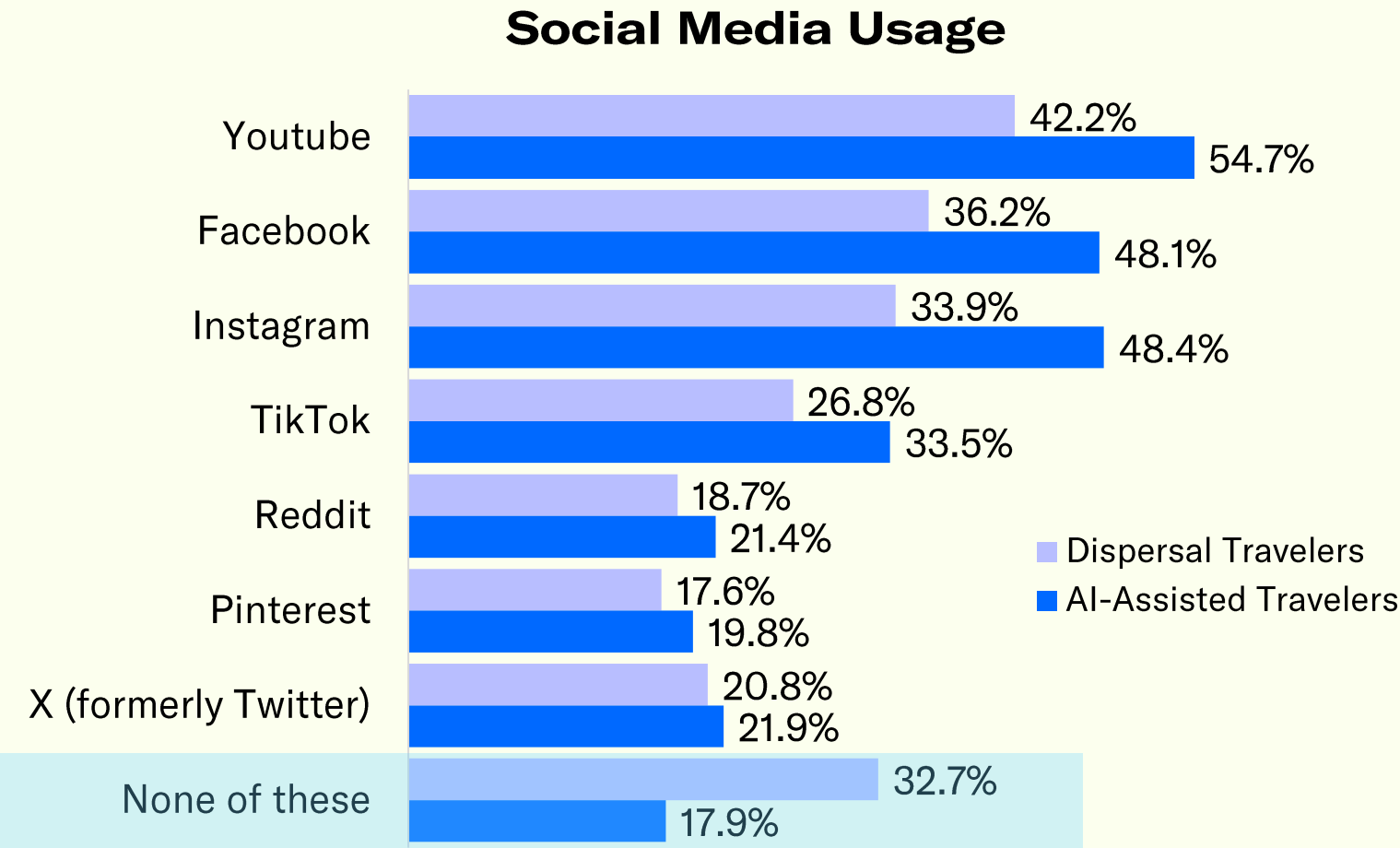
Top Marketing Channels



They Seek Editorial Content Through More Analog Channels Than Other Segments

Question:

In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS?



A person wearing a bright yellow puffer jacket, black pants, and orange boots is sitting on a dark, rocky outcrop. They are looking out over a vast body of water filled with numerous icebergs of various sizes. The icebergs have a striking blue-green hue. In the background, there are dark, snow-capped mountains under a cloudy sky. The overall scene is serene and majestic.

Future Partners

We Asked Dispersal Travelers...

Key Takeaways for the Dispersal Traveler

- 1 *Official guides and email are your most powerful tools. Content strategy here favors editorial depth so reaching this audience with messaging means leading with a compelling story rather than visual spectacles.*
- 2 *Pitch depth, not size. Historical sites, art, wine, culinary culture, agri-tourism, and photography are their top interests*
- 3 *They want cities and places with earned character, not tourist gloss. Secondary markets should consider this their highest-potential segment.*
- 4 *Their over-index on spontaneous travel means last-minute packages, flexible booking, and "plan your trip in 24 hours" content styles can work well for this audience.*

The Future of DMO Email Marketing



The Future of DMO Email Marketing

From Newsletters to Lifecycle Marketing



What is lifecycle email marketing?

Lifecycle email marketing is a type of segmentation that delivers specialized email content to consumers based on where they are in the consumer lifecycle, which is typically broken down into five stages:

Awareness
The consumer knows the brand—or destination—exists and has just opted into email communications.

Engagement
The consumer is actively searching for a product, service or experience that the brand or destination fulfills and is interacting with the content.

Acquisition
The consumer has decided on the brand and takes a decisive action—like buying a product or visiting a destination.

Retention
The consumer becomes a repeat buyer or, in destination marketing terms, a repeat visitor.

Loyalty
Beyond repeat purchases or visitation, the consumer becomes an advocate for the brand or destination, sharing their experiences with their network.

The attention span crunch: Why personalization matters

It's no secret that our attention spans have been continually decreasing for the past several decades, due to a host of factors like the birth of the internet, the rise of short-form content, the always-on digital news cycle and more. According to Gloria Mark, professor of informatics at UC Irvine and an expert in the effects of digital media on human behavior, our average attention span is at an all-time low: just 47 seconds.

47sec
is our average attention span



with McKinsey suggests that attention er spends reading an email or watching a video y/e consuming.

tion doesn't simply equal is the amount of valuable time Not all attention is the same—e valuable, focused attention

all email marketing is over. Travelers have less they've come to expect personalization in their and email.

arent interests and priorities. For example, a consumer who sted a travel guide is likely in the awareness stage, so they're xtent about experiences they could have in a destination; as closer to conversion, they might be more receptive to partner ation about traveling to the destination.

MilesPartnership.com 4

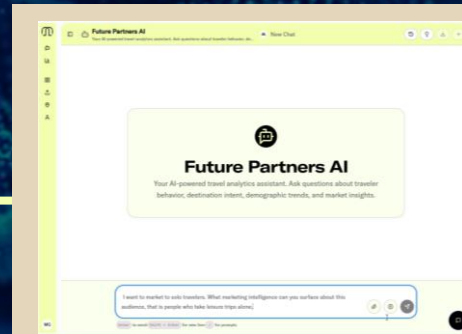
MilesPartnership.com 3



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

For more information & to sign up for your trial visit:

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