

A man and a woman are hiking on a rocky trail in a forest with vibrant autumn foliage. The man is wearing a grey beanie, a brown jacket, and a backpack. The woman is wearing a red beanie, an orange jacket, and a backpack. They are both smiling and looking towards the right. The background shows a valley with a river and mountains in the distance.

Future Partners

The State of the American Traveler

October 2026

Opportunity powered by *Insight*

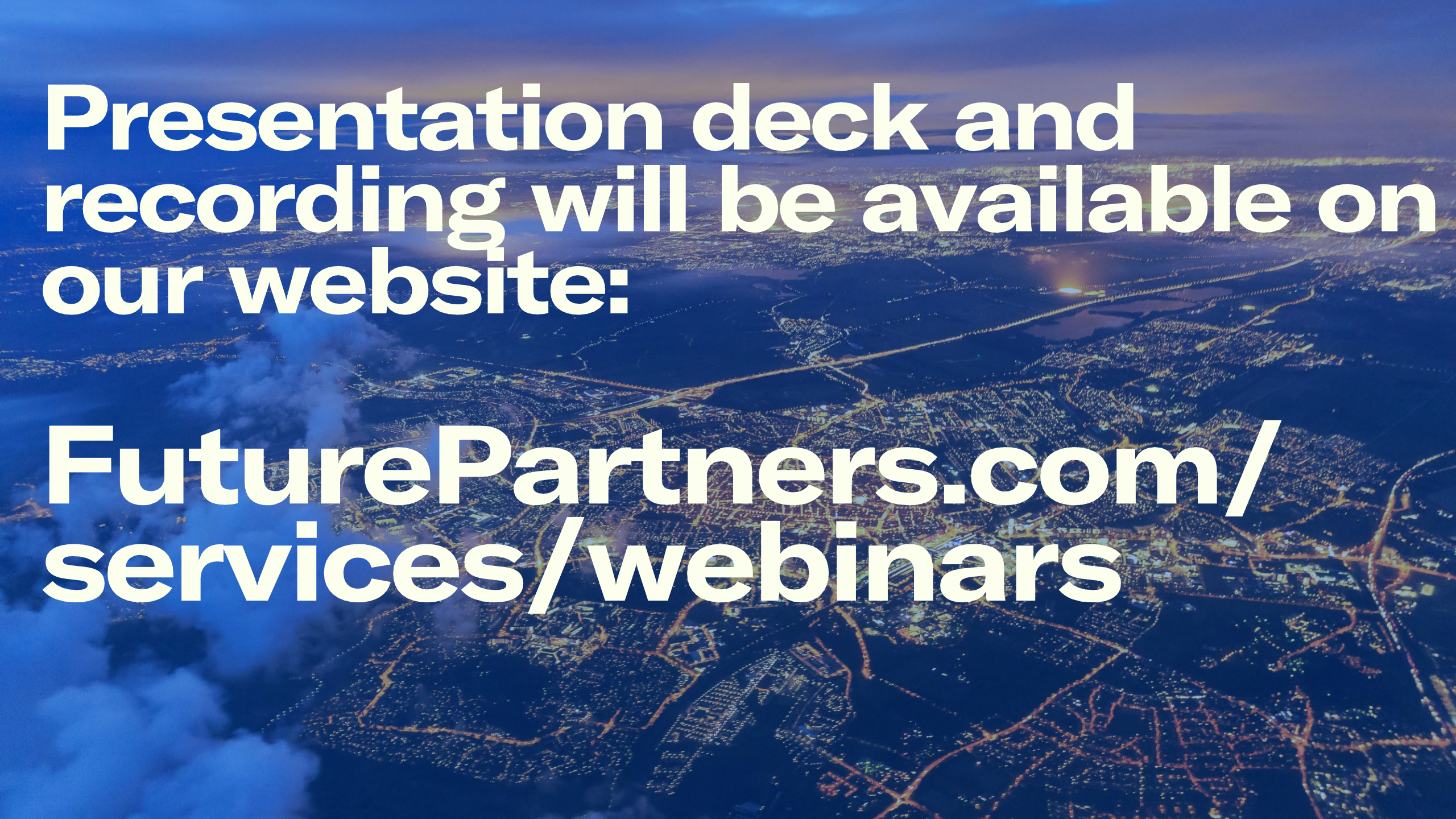
Future Partners

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

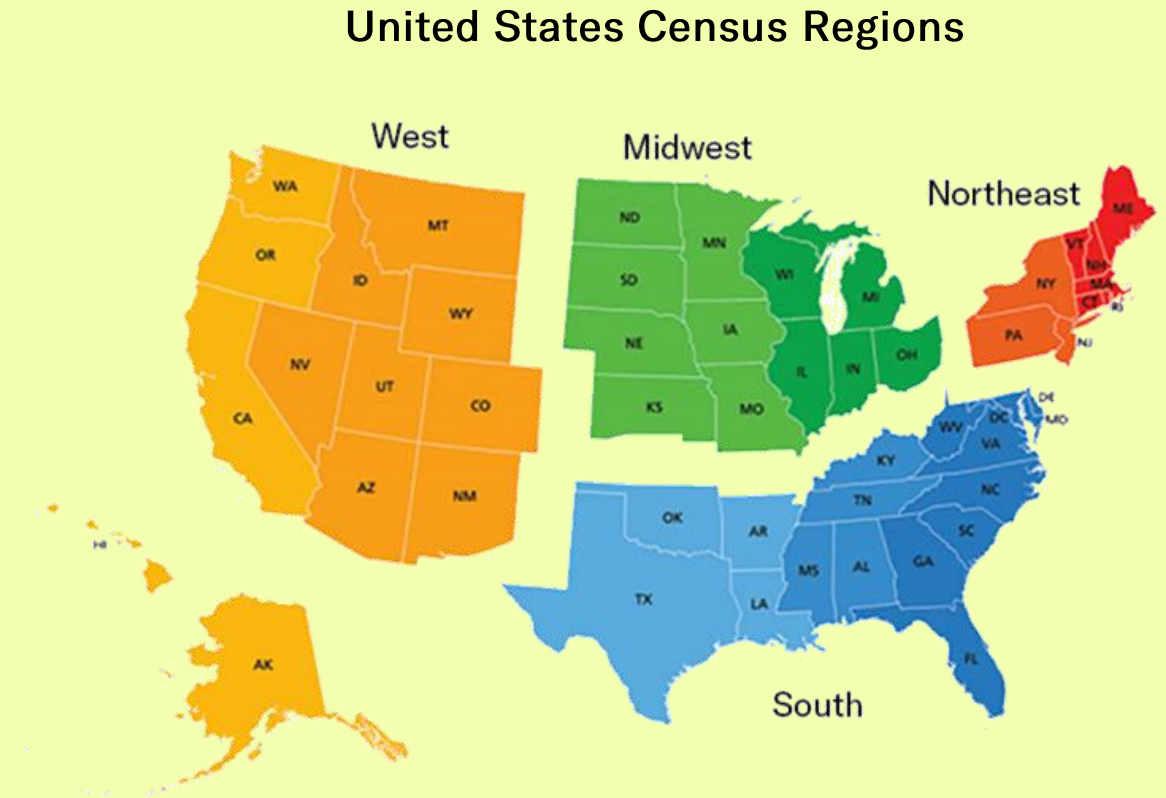
An aerial night photograph of a city, likely San Francisco, with the Golden Gate Bridge visible in the distance. The city lights are reflected on the water, and the sky is dark with some clouds. The text is overlaid on the top left portion of the image.

**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: [September 15 – 22](#)
- 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

Financial Snapshot

Better off than a year ago

31.7%

Down from 32.8% last month and 34.8% in September 2025

Expect to be better off in a year

43.3%

Down from 45.0% last month, below 45.7% a year ago

Expect a recession within 6 months

48.5%

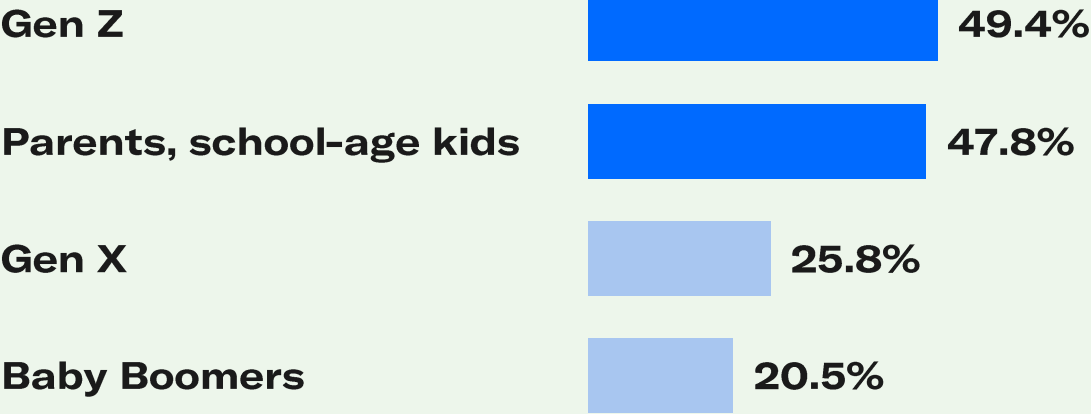
Up from 46.6% last month and 46.8% a year ago

Being careful with money

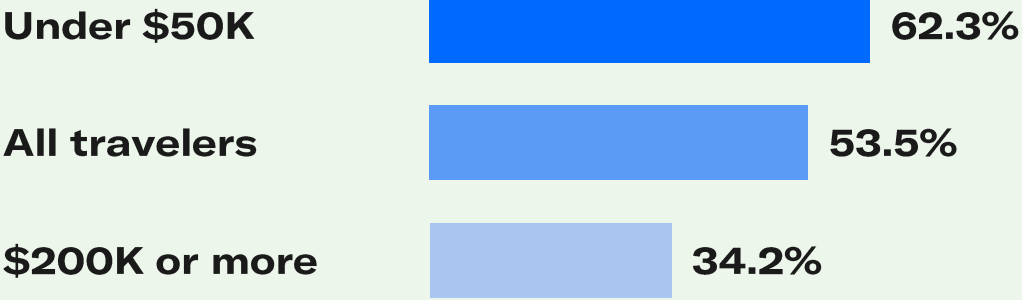
53.5%

Up from 52.3% last month and 46.2% a year ago

Better off than a year ago, by segment



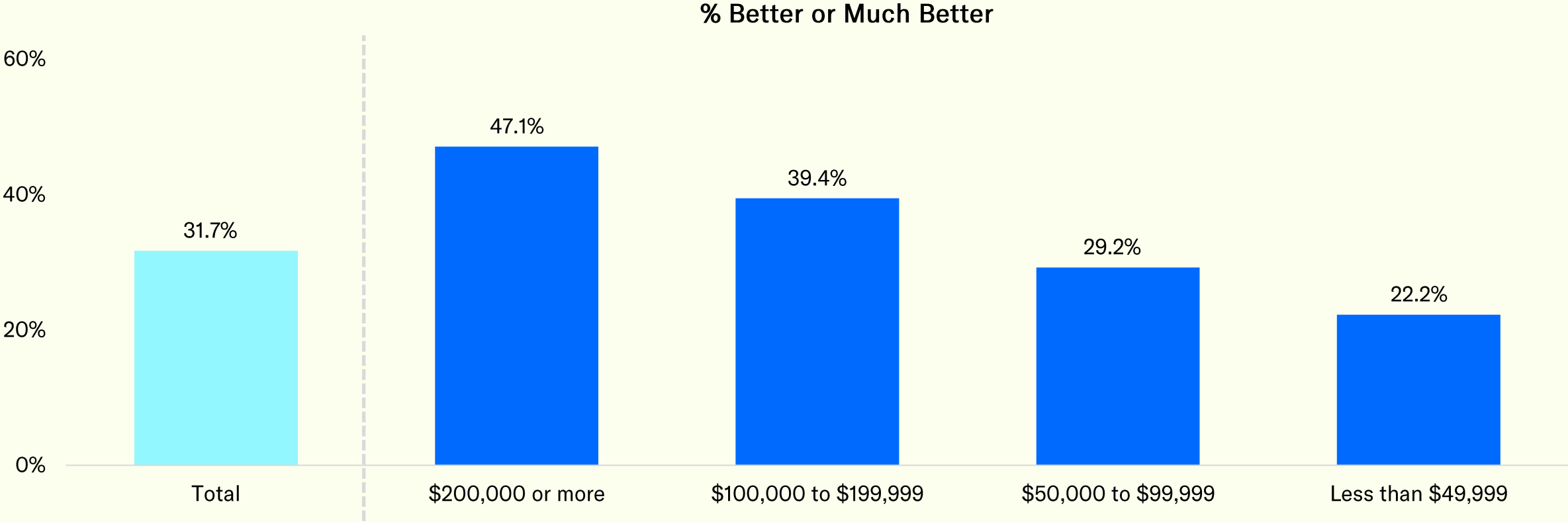
Watching spending on recession concerns, by income



Top earners are twice as likely as the lowest earners to feel better off

Question:

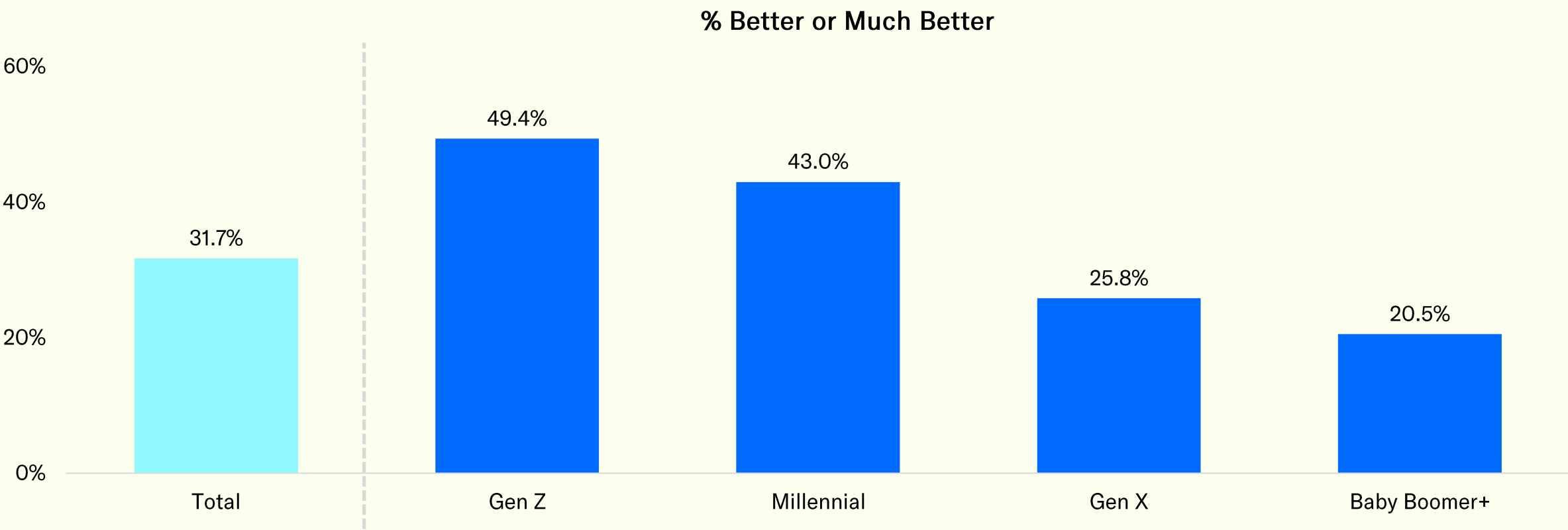
Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)



Gen Z is more than twice as likely as Boomers to feel better off

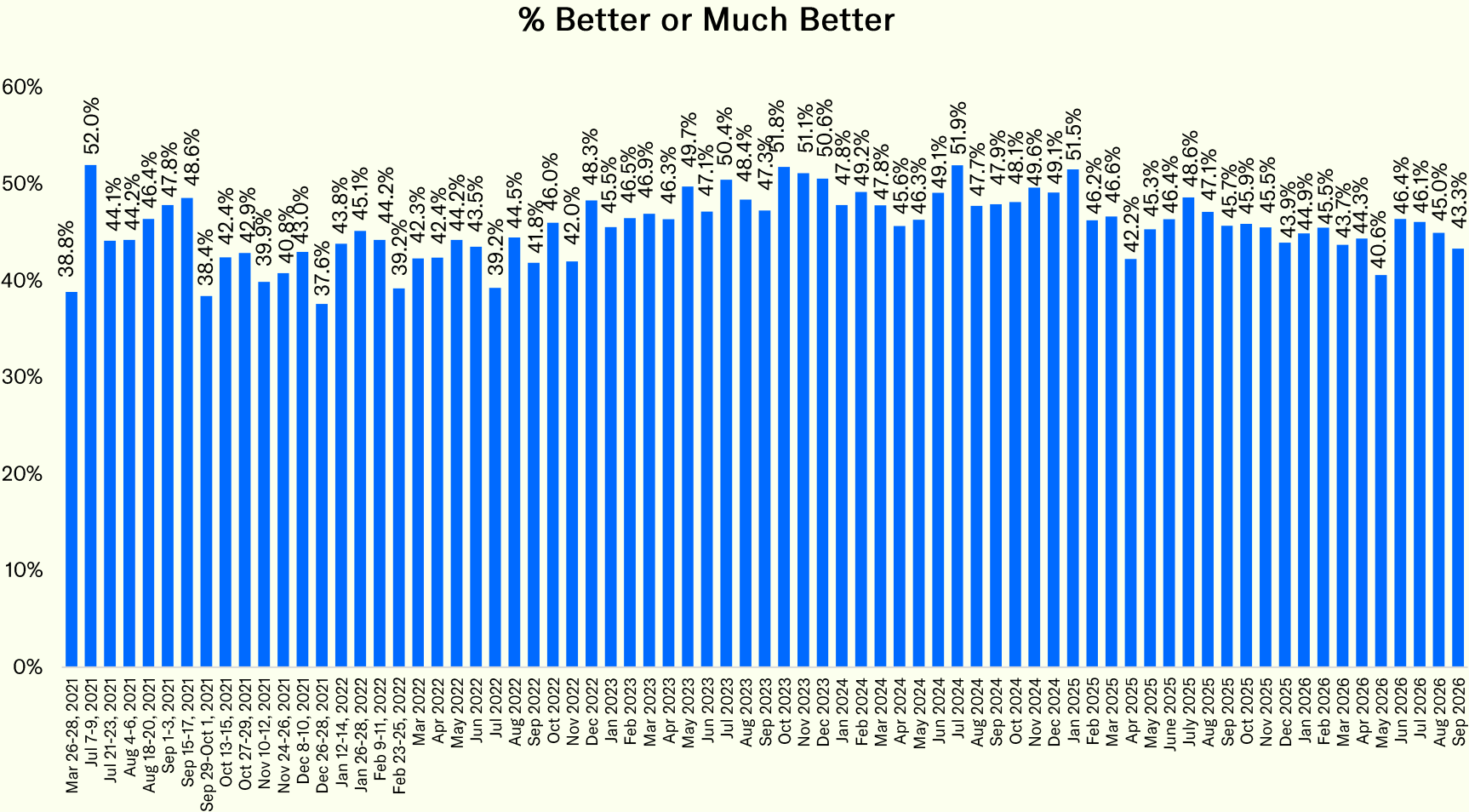
Question:

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



Fewer travelers expect to be better off a year from now

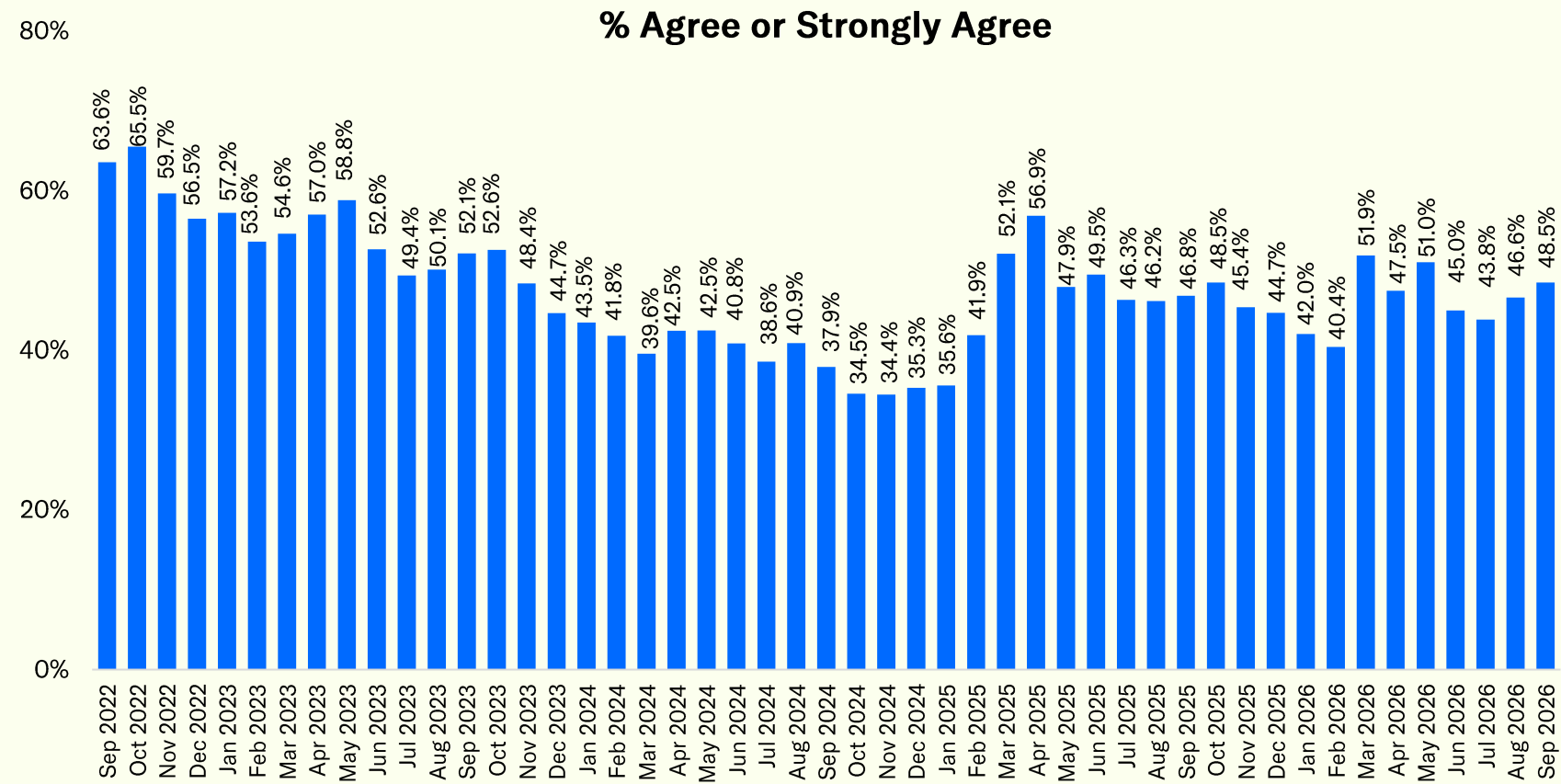
Question:
LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



(Base: All respondents, 1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022-2026.)

Recession expectations rose for a second straight month

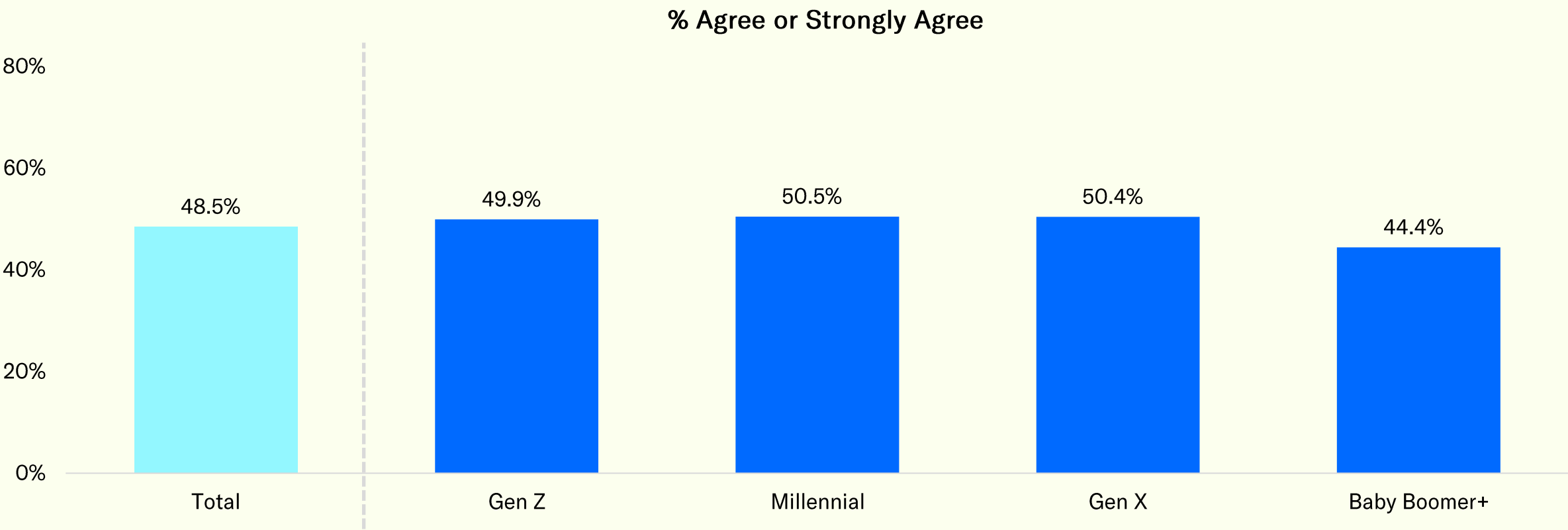
Question:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



About half of every generation expects a recession, Boomers slightly fewer

Question:

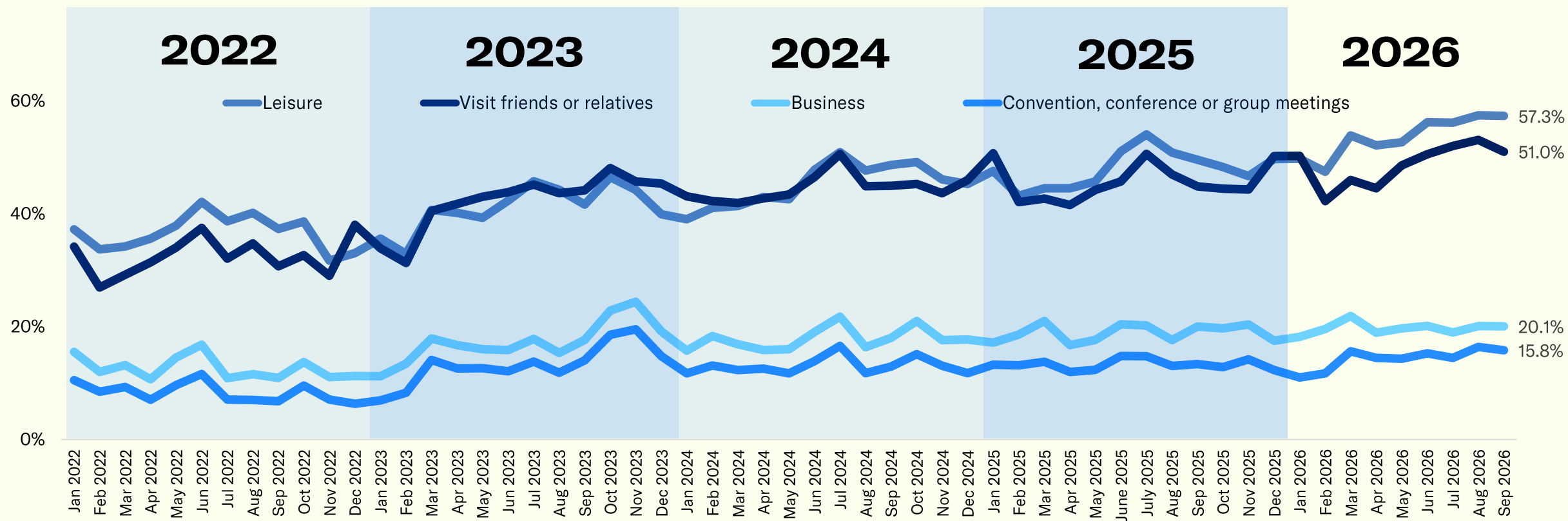
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Overnight leisure travel is holding well above last year

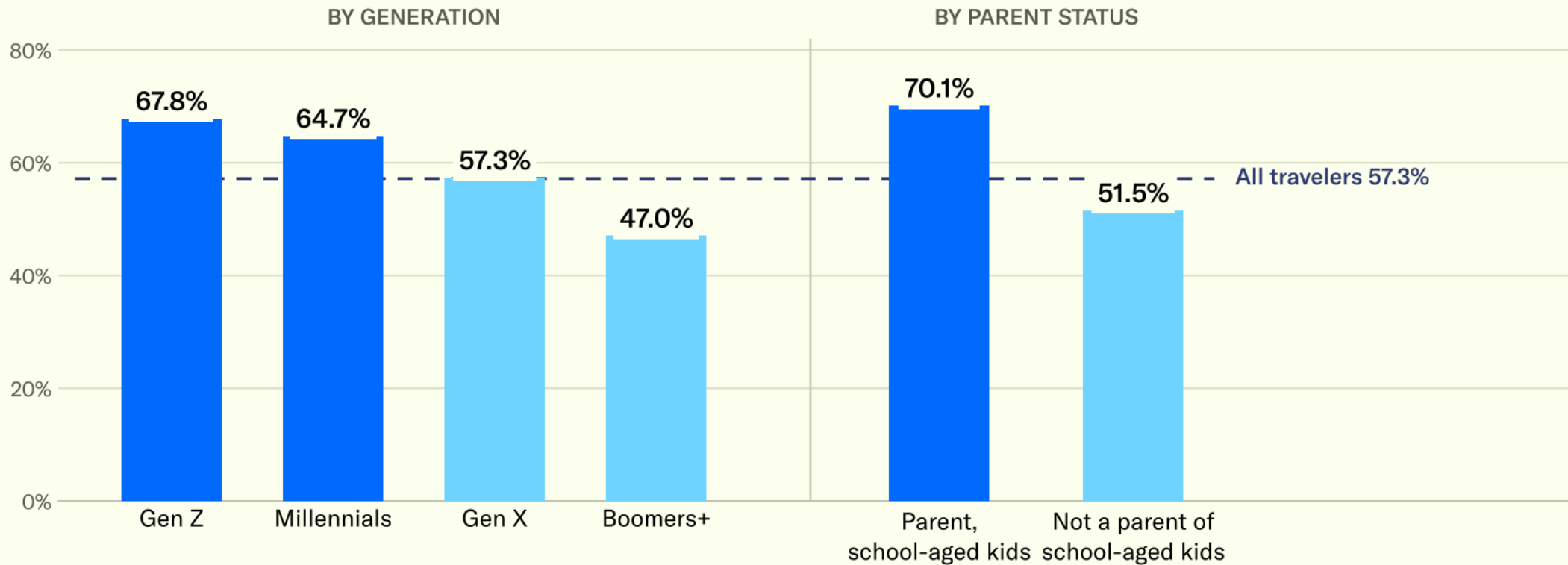
Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (Select the correct number of each trip type)

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



Younger Travelers and Families Are Carrying Overnight Travel

Question: How many OVERNIGHT trips of each type have you taken in the PAST MONTH? (% taking one or more overnight leisure trip)

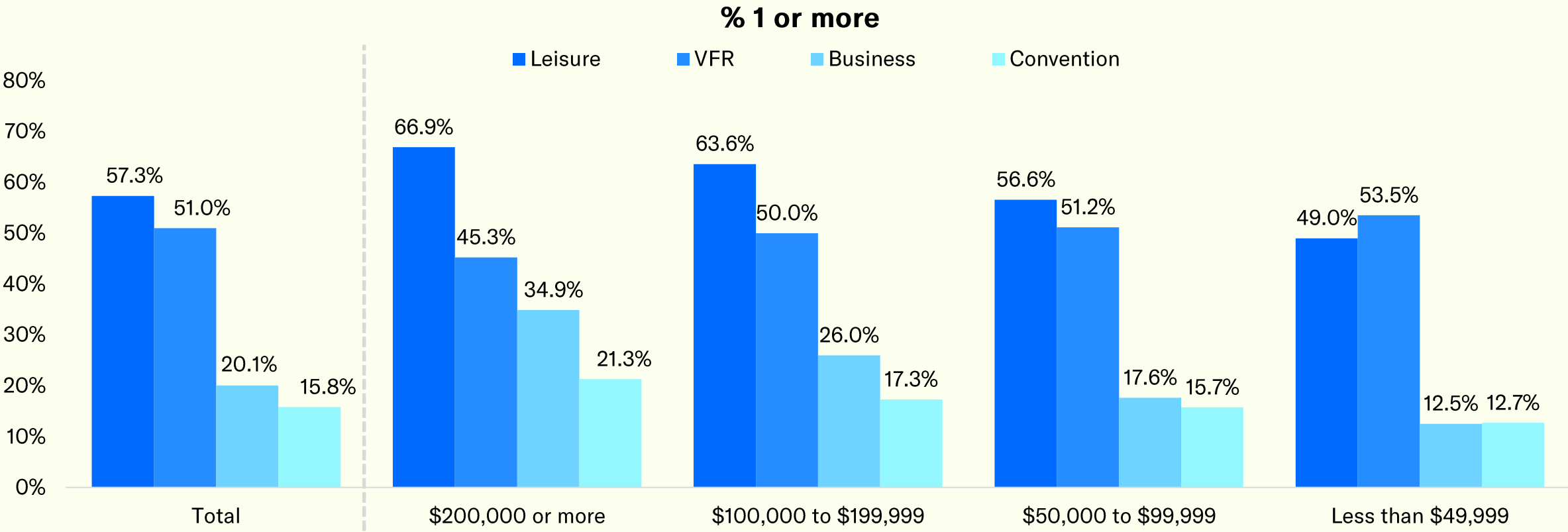


Parents of school-aged children are 18.6 points more likely than non-parents to have taken an overnight leisure trip in the past month.

Top earners lead on leisure trips, lower earners visit family and friends more

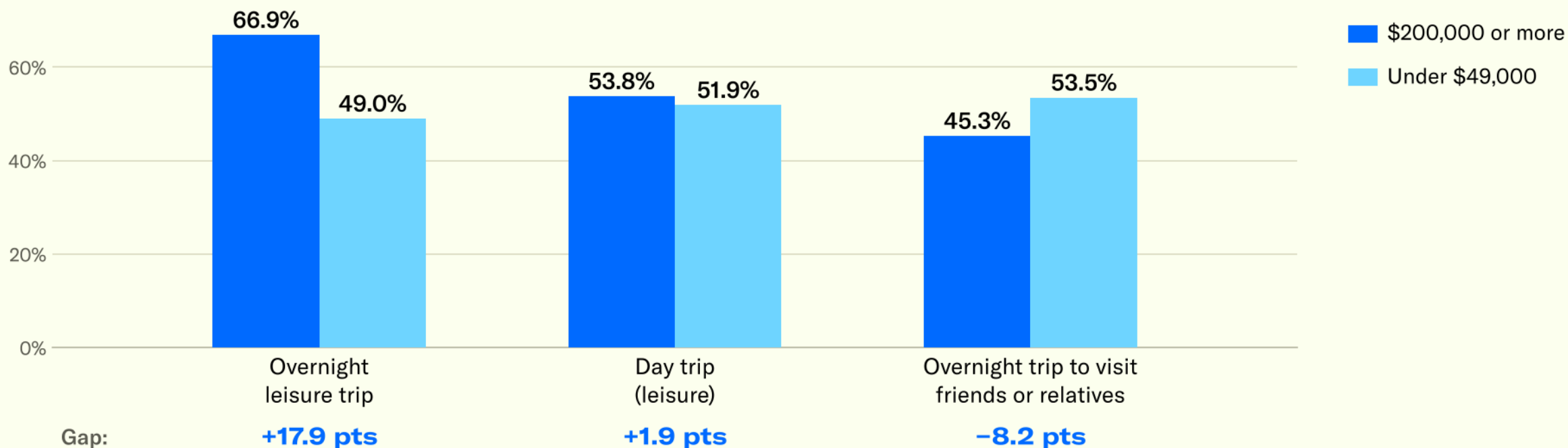
Question:

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



Lower-Income Travelers Don't Travel Less — They Travel Closer to Home

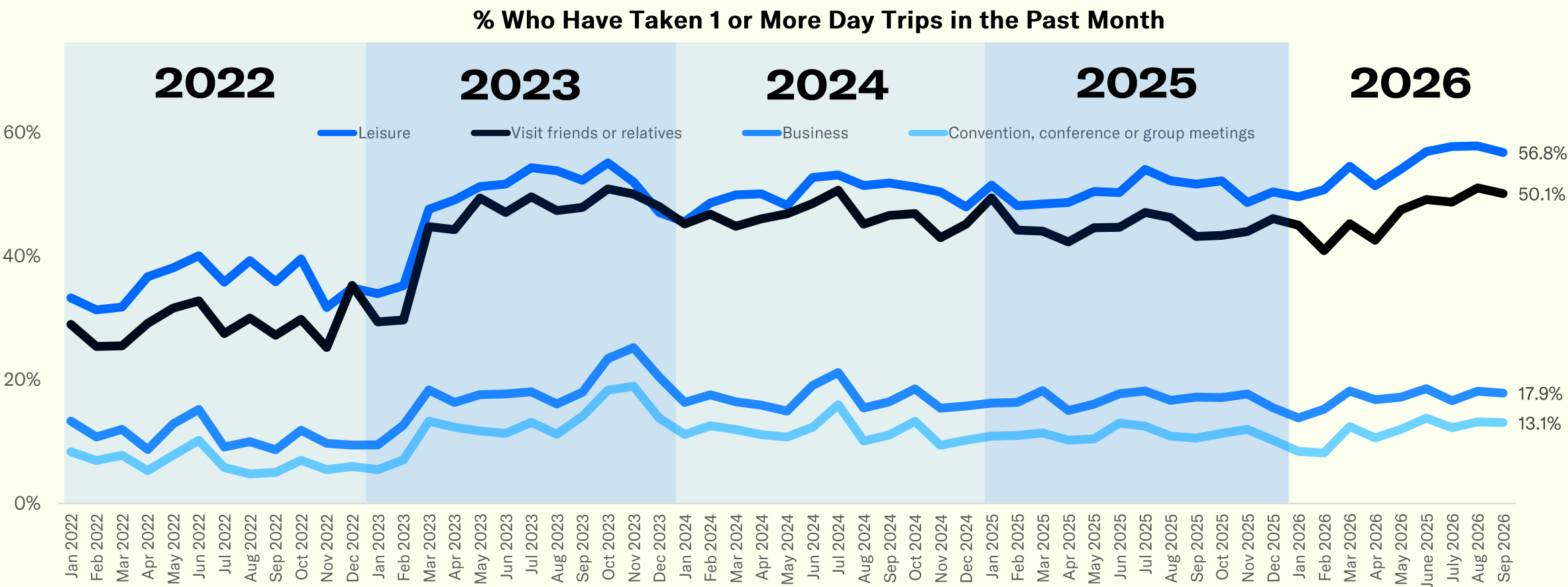
Question: How many OVERNIGHT trips / DAY TRIPS of each type have you taken in the PAST MONTH? (% taking one or more)



The 18-point income gap on overnight leisure travel nearly disappears on day trips — and reverses on trips to see family. Budget-constrained travelers are still moving; they are moving shorter distances.

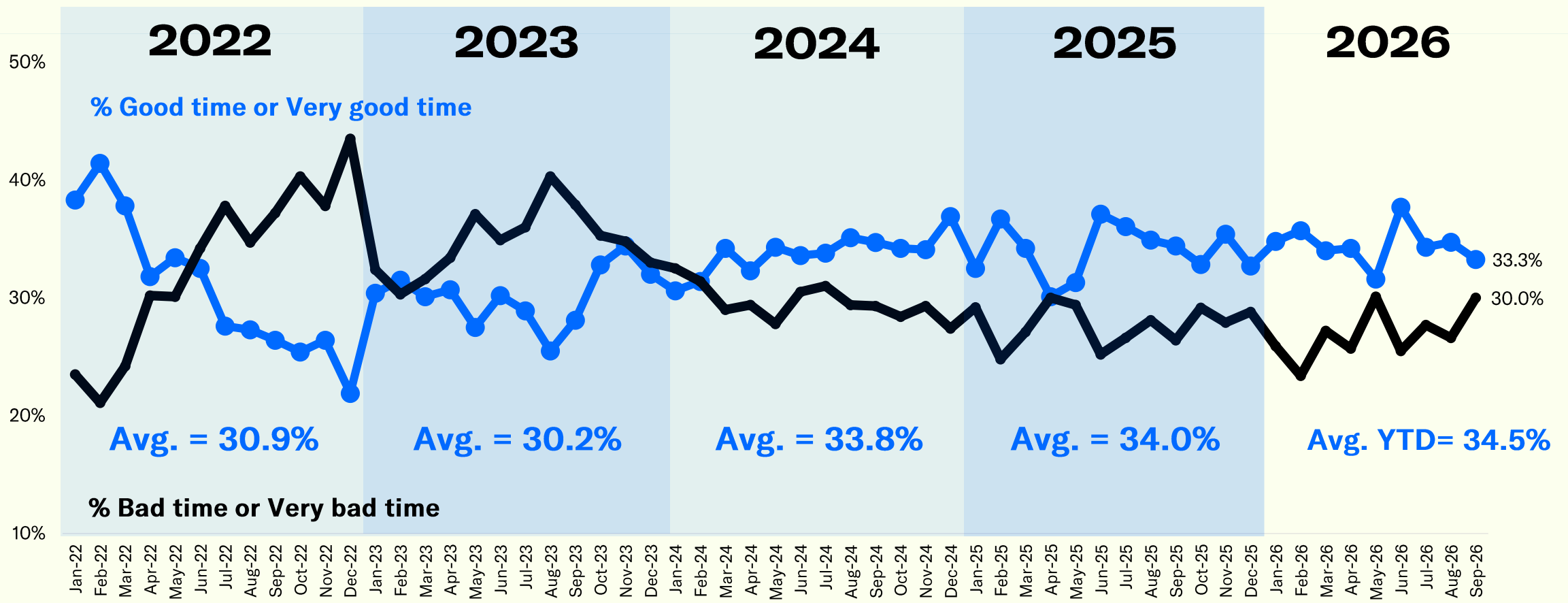
Day trips eased slightly, remain above last year

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



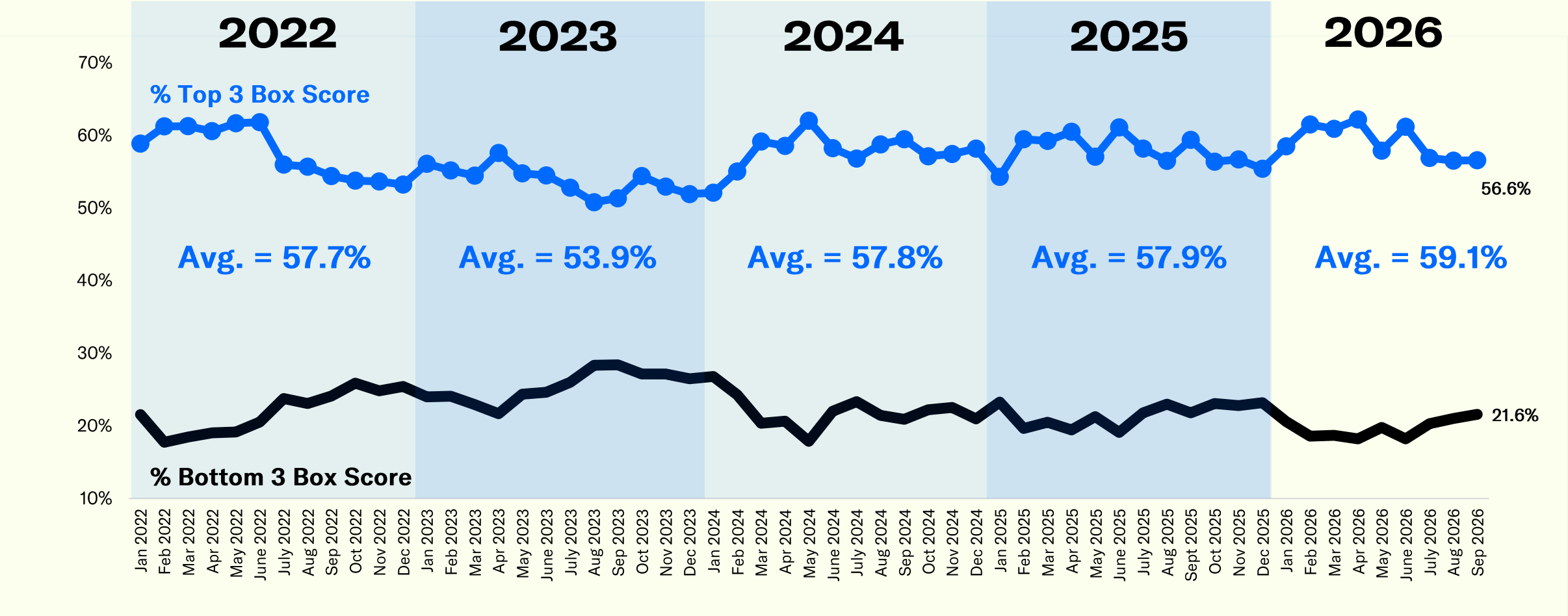
One in three travelers says now is a good time to spend on travel

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?



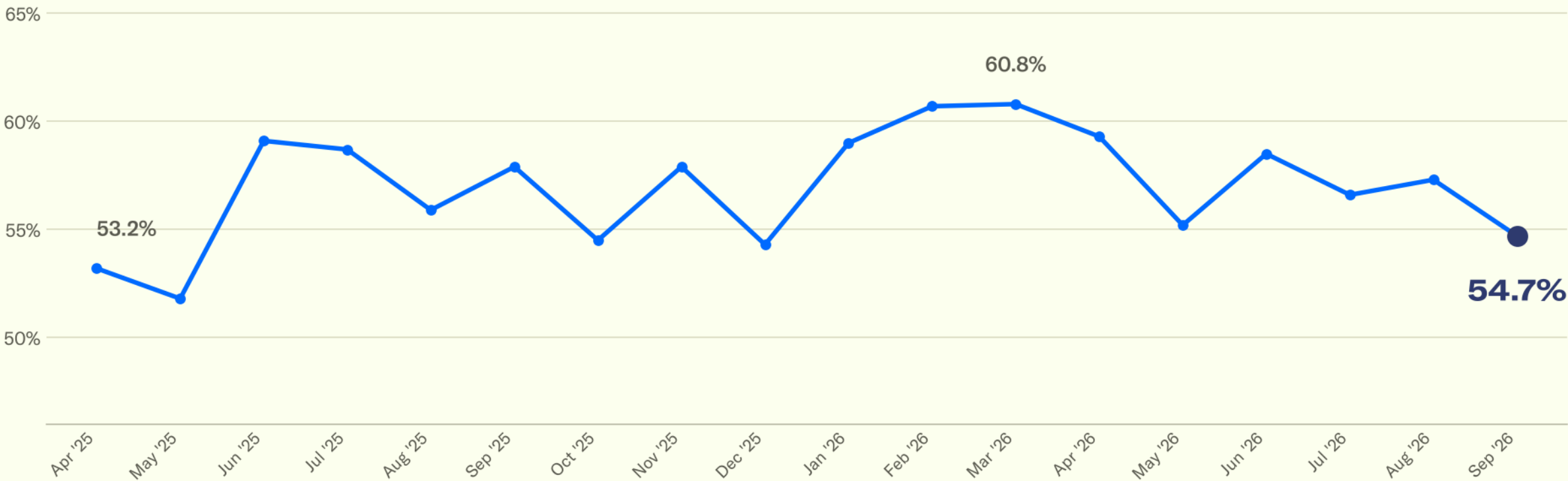
Travel slipped as a spending priority

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.



Travel's Recession-Proof Status Slipped to Its Lowest Point Since December

Question: Even in an economic recession, I'd consider travel to be a worthwhile investment. (% agree or strongly agree)

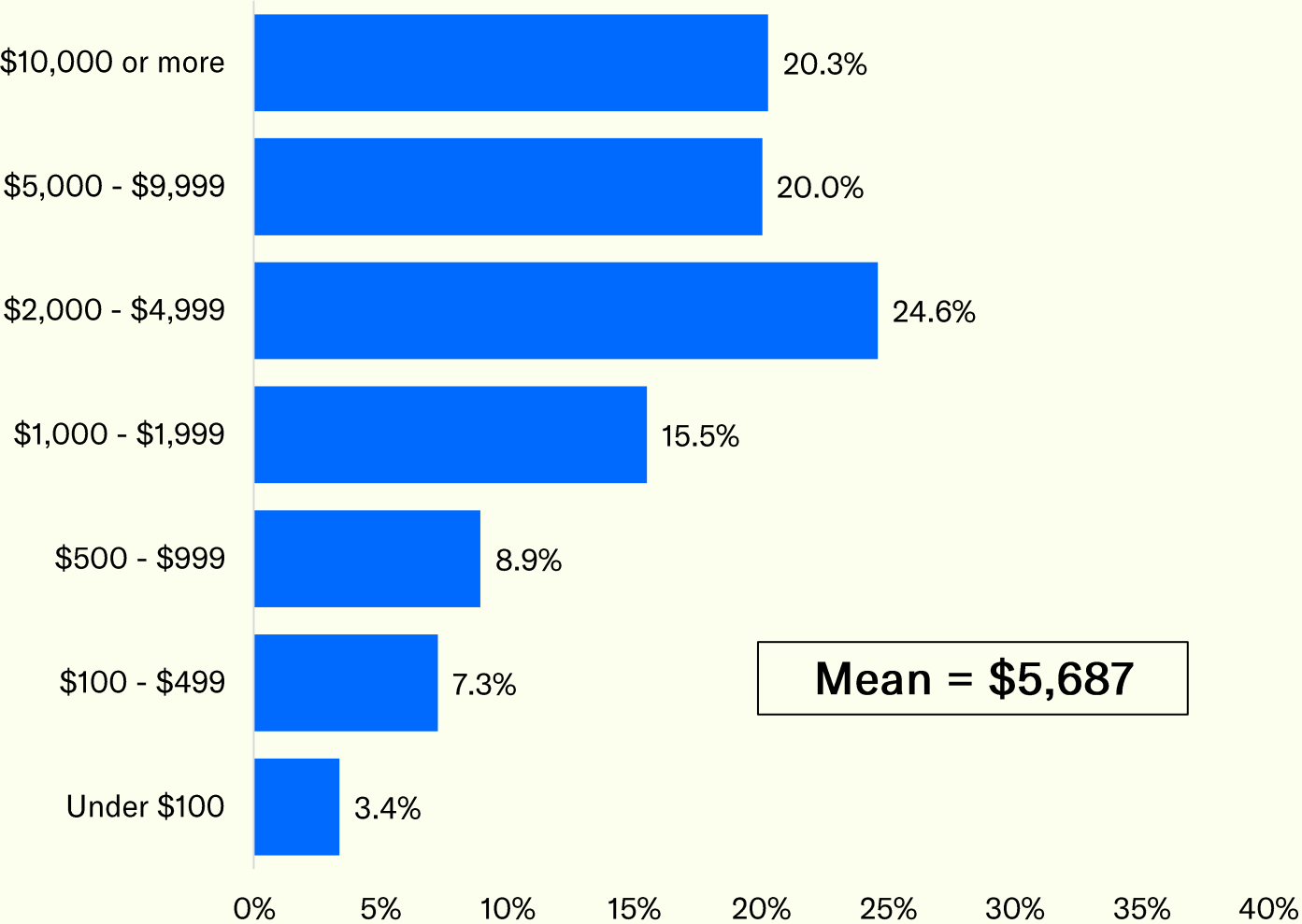


Down from 57.3% in August and 60.8% at the March peak. Parents of school-aged children remain the most committed at 61.3%; Gen Z the least, at 49.6%.

Travelers plan to spend up to \$5,687 on average over the next 12 months

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): _____

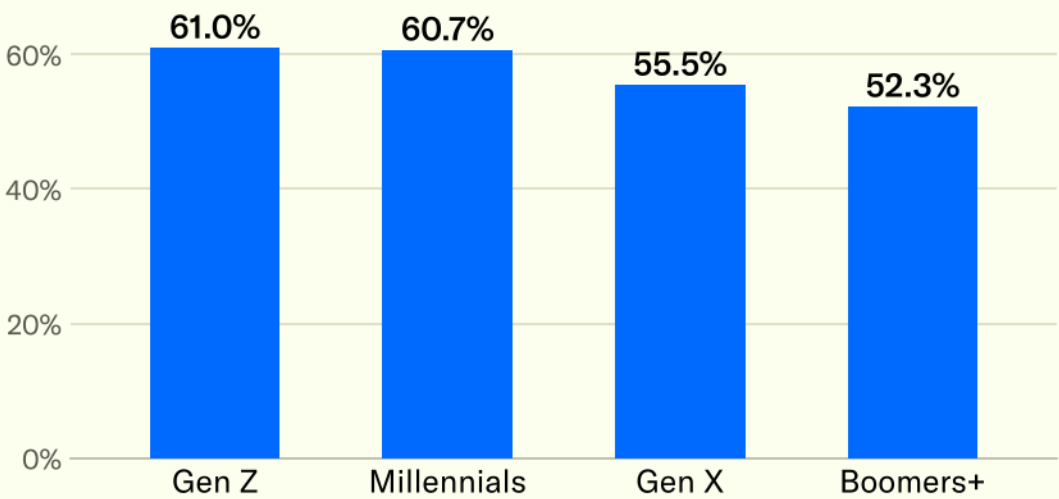


Gen Z Ranks Travel Highest as a Spending Priority — and Budgets the Least For It

Question: Leisure travel will be a(n) ___ spending priority in the next three months | How much IN TOTAL is the maximum you will spend on leisure travel during the NEXT 12 MONTHS?

TRAVEL IS A HIGH SPENDING PRIORITY

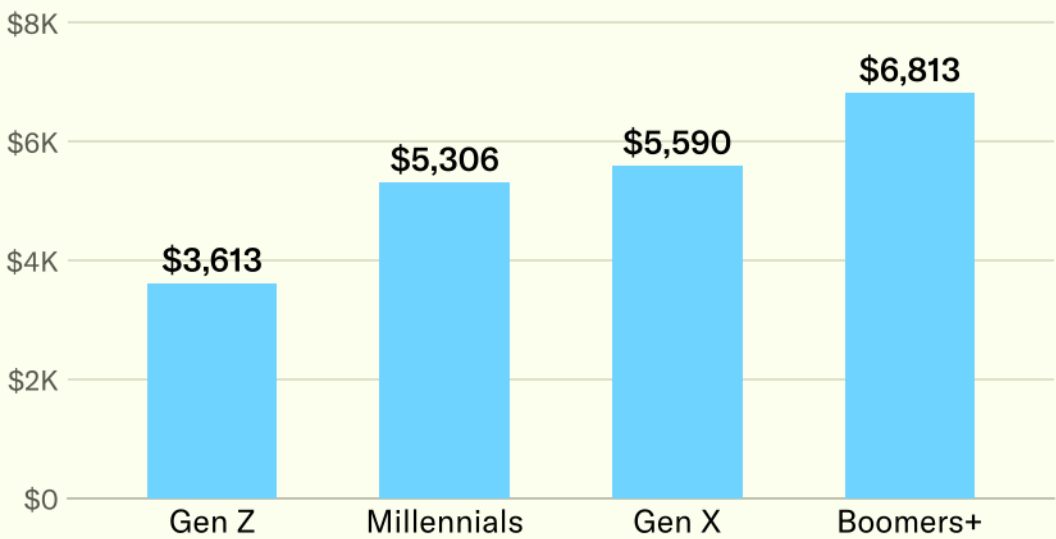
Top-3 box, next three months



Gen Z mean household income \$78,000 vs \$103,000 for American travelers overall.

MEAN MAXIMUM TRAVEL BUDGET

Next 12 months

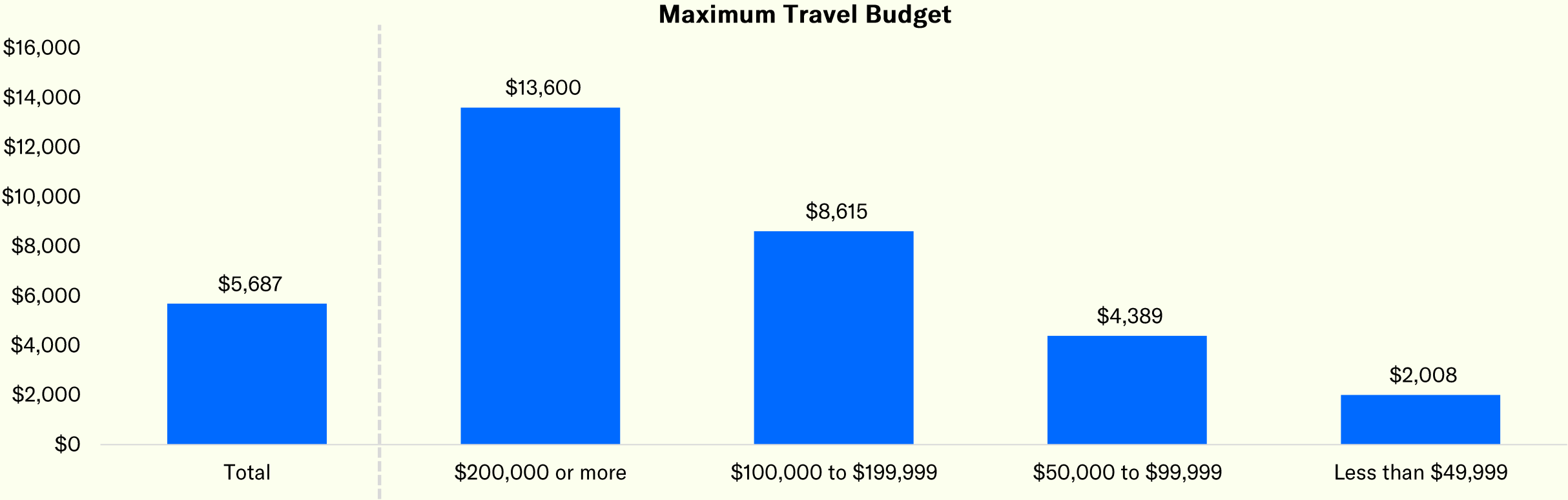


The appetite is there and the money is not. Gen Z ranks travel a higher priority than any other generation while budgeting 47% less than Boomers.

Top earners plan to spend almost 7x as much on travel as the lowest earners

Question:

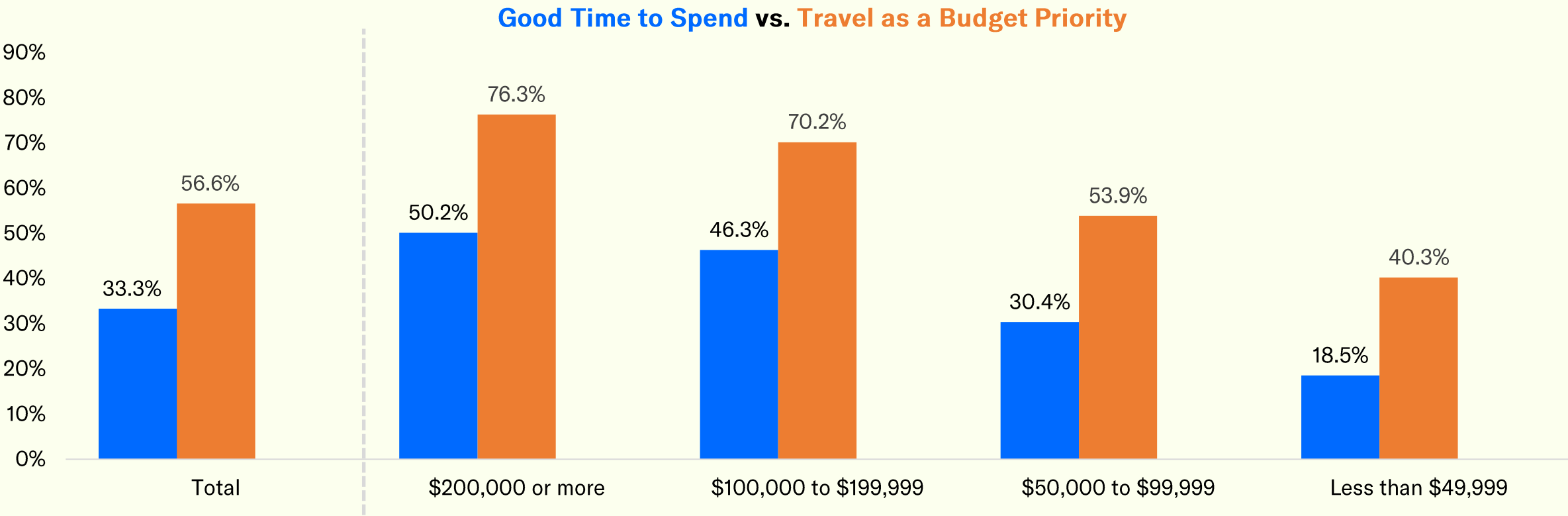
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months): _____



Top earners are nearly three times as likely to say now is a good time to spend

Question:

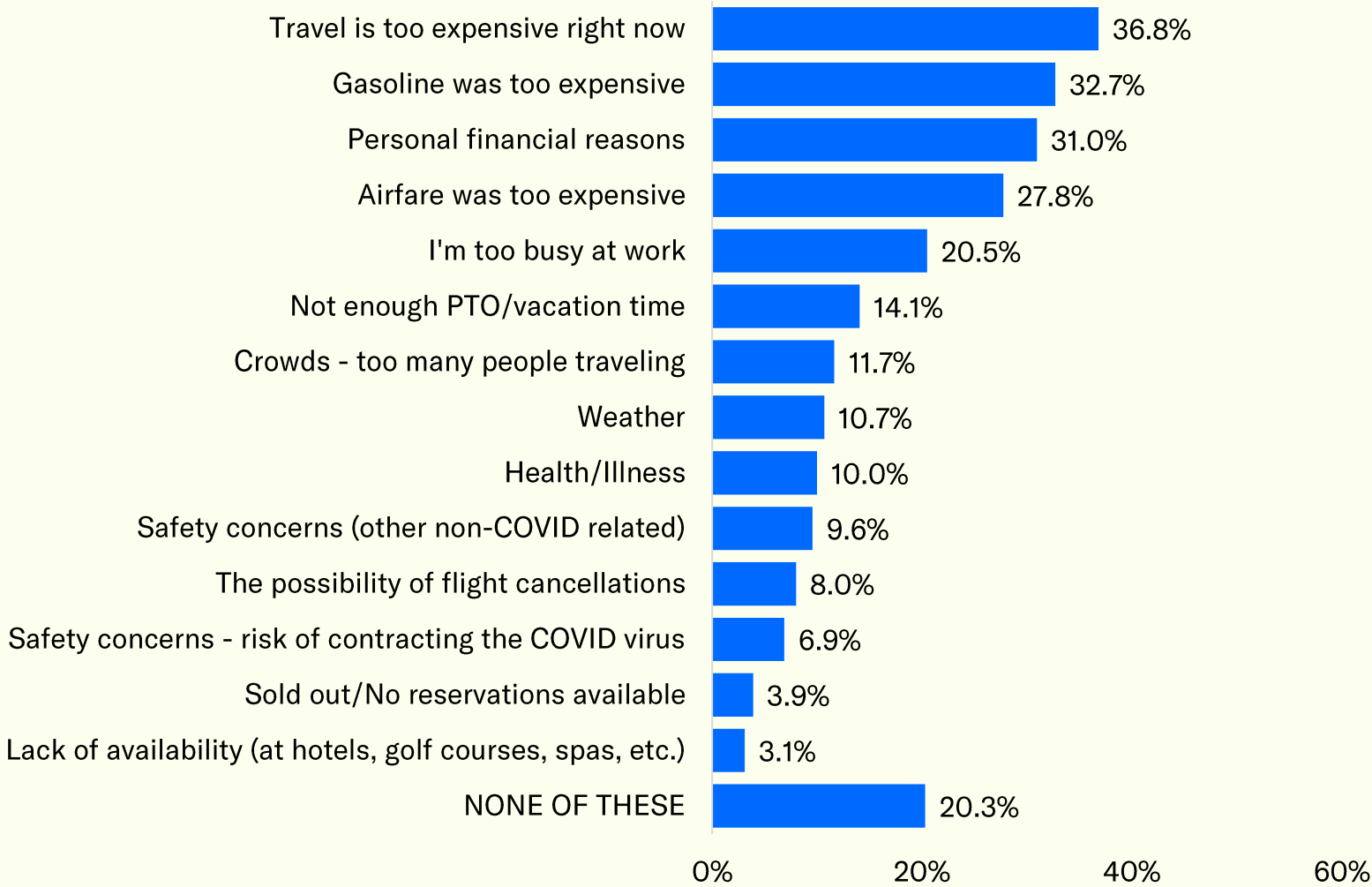
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? | Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)Leisure travel will be a(n) _____.



Cost is the main reason travelers aren't traveling more

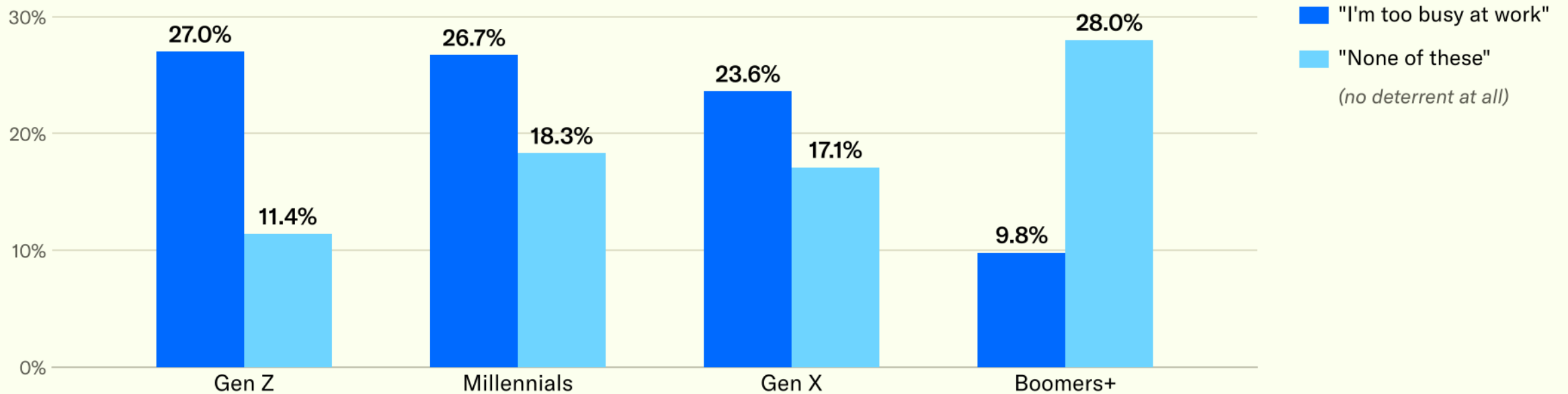
Question:

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)



Time Is the Working-Age Constraint; Boomers Report the Fewest Barriers of Any Kind

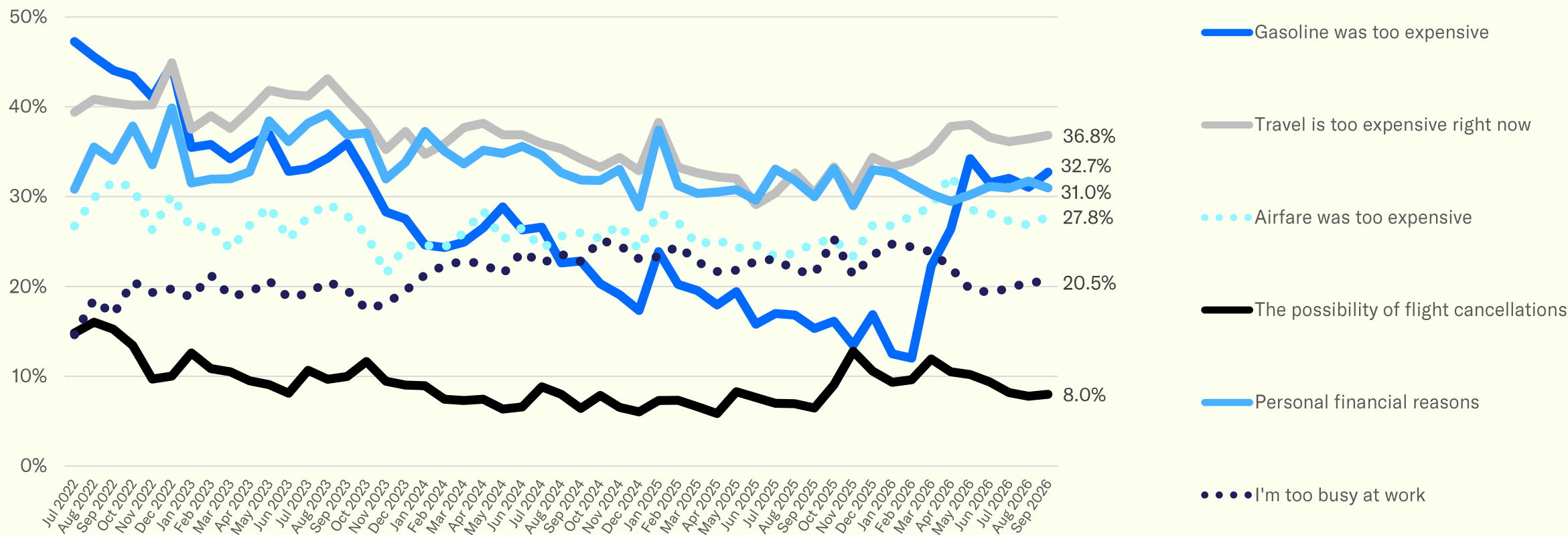
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?



Gen Z and Millennials are nearly three times as likely as Boomers to say work is what stopped them traveling — while Boomers are the most likely of any generation to report no barrier at all.

Gas prices are holding back twice as many travelers as a year ago

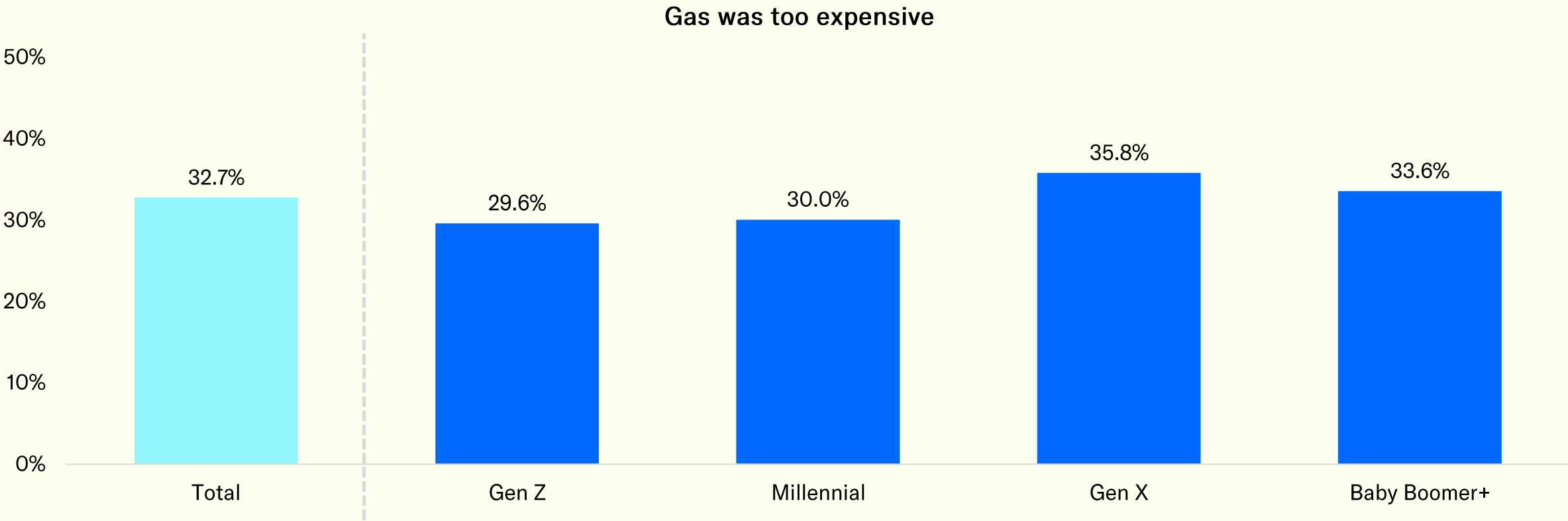
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Gen X is the generation most held back by gas prices

Question:

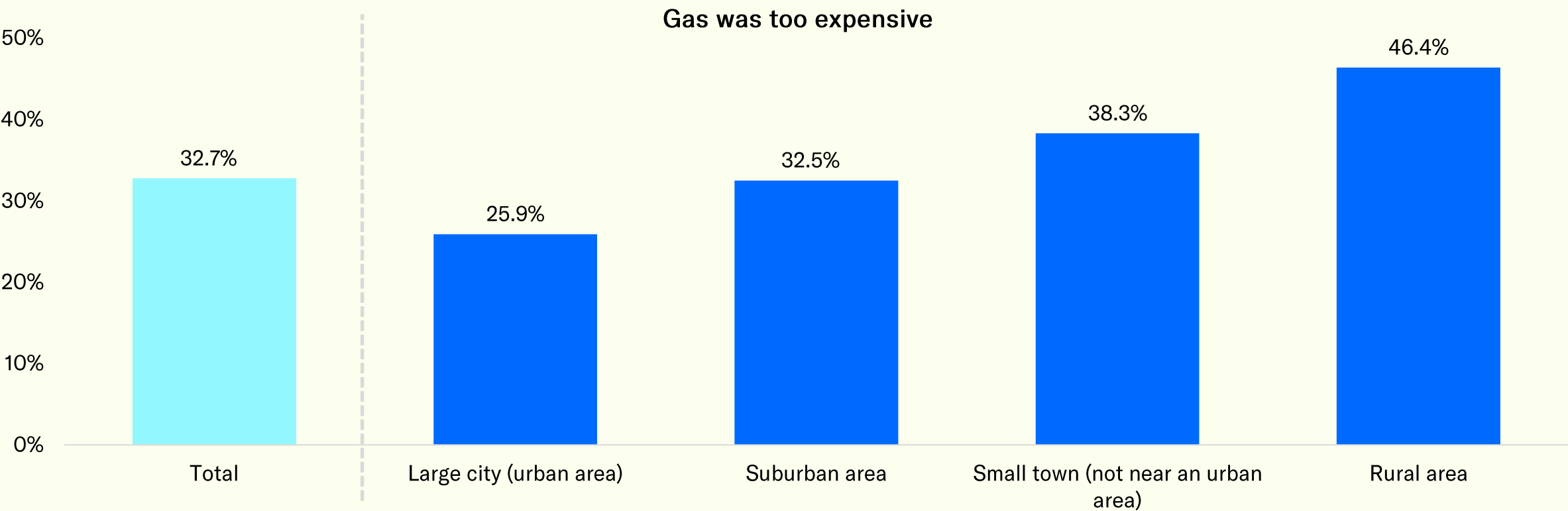
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply). Base: Respondents who selected “Gasoline was too expensive.”



Rural travelers are the most likely to be held back by gas prices

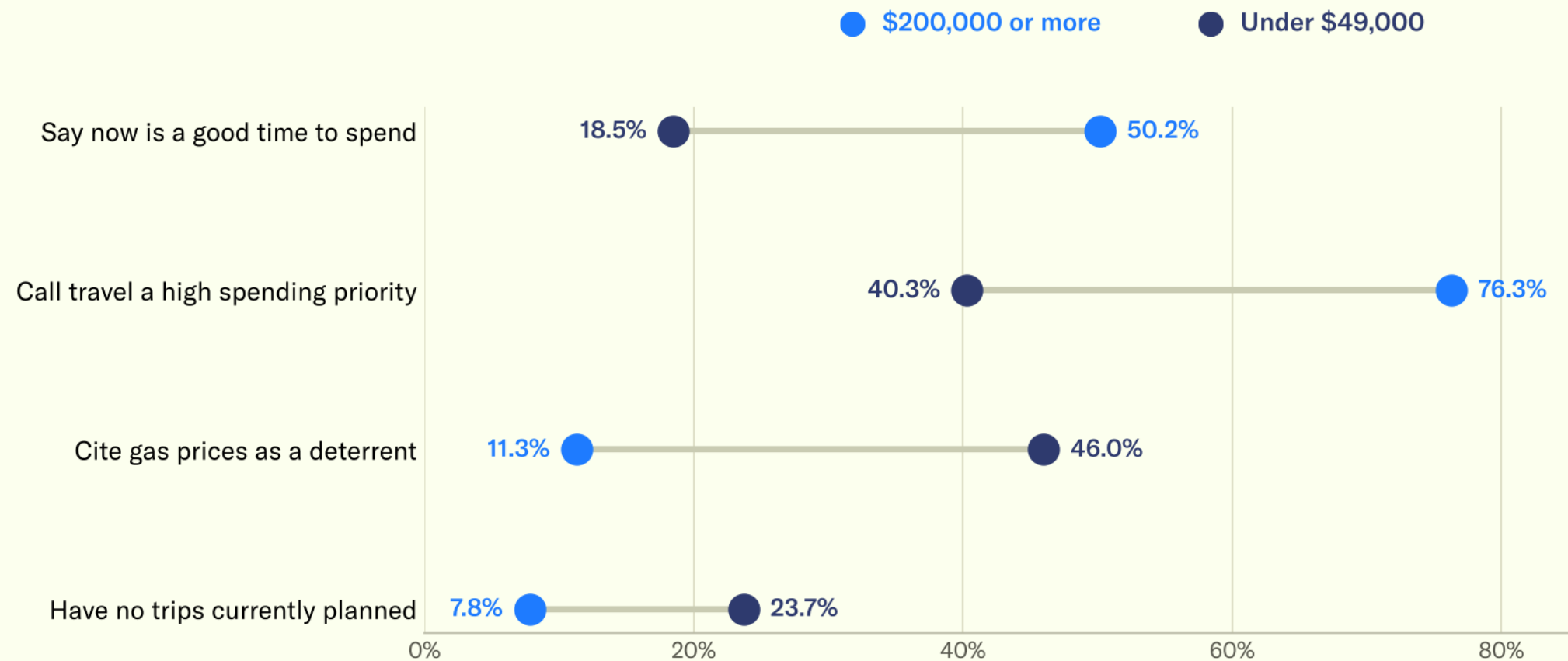
Question:

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.”



Income, Not Age, is Deciding Who Spends and Who Sits Out

Question: Selected travel spending and barrier measures among American travelers, by annual household income.

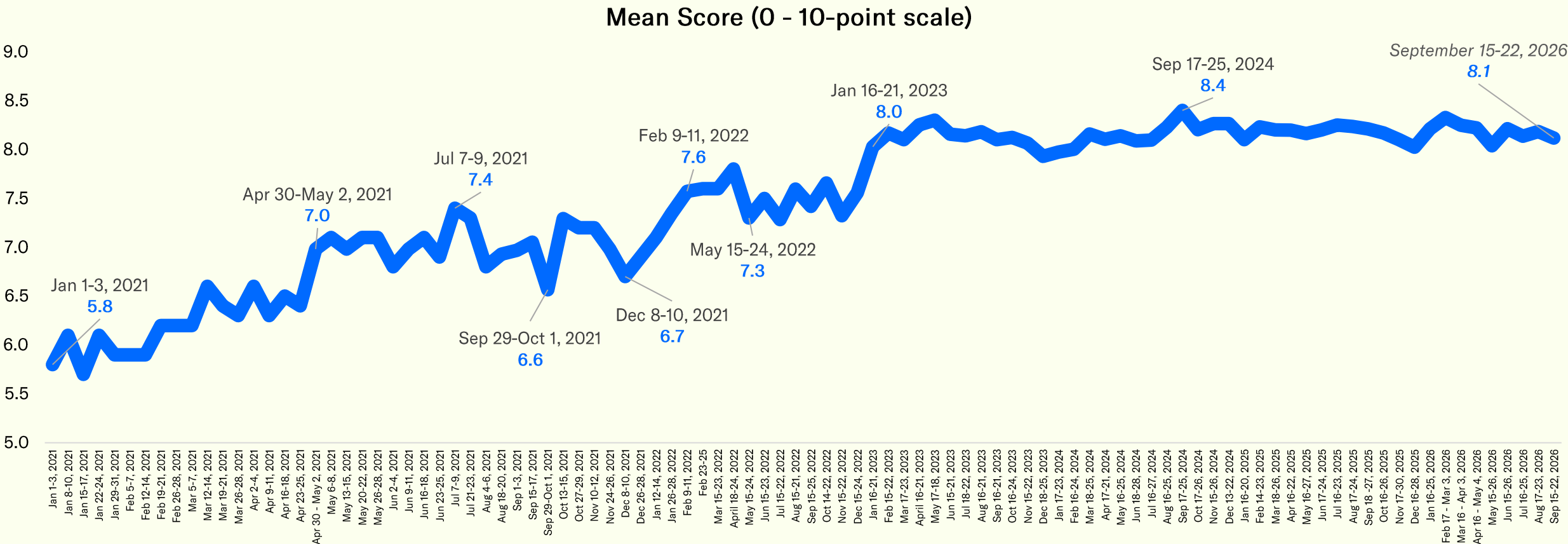


Top earners budget \$13,600 a year for leisure travel — 6.8 times the \$2,008 of the lowest income group.

Excitement for travel holds steady

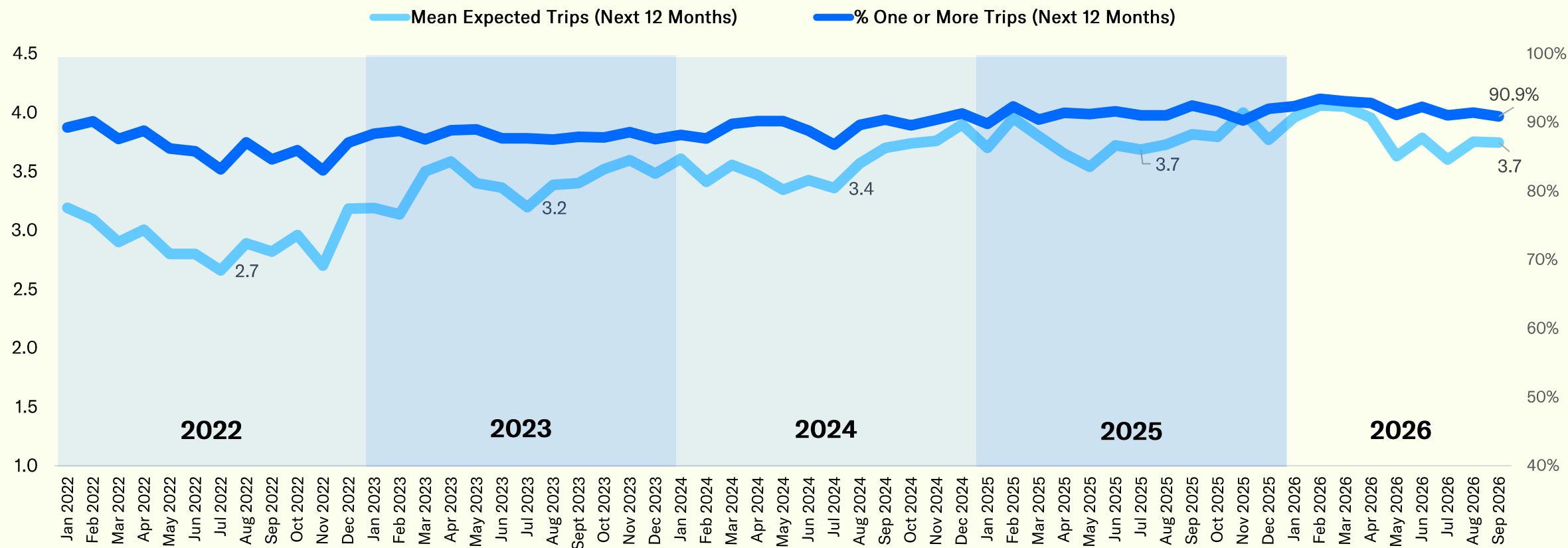
Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



Travelers expect to take nearly four leisure trips in the next year

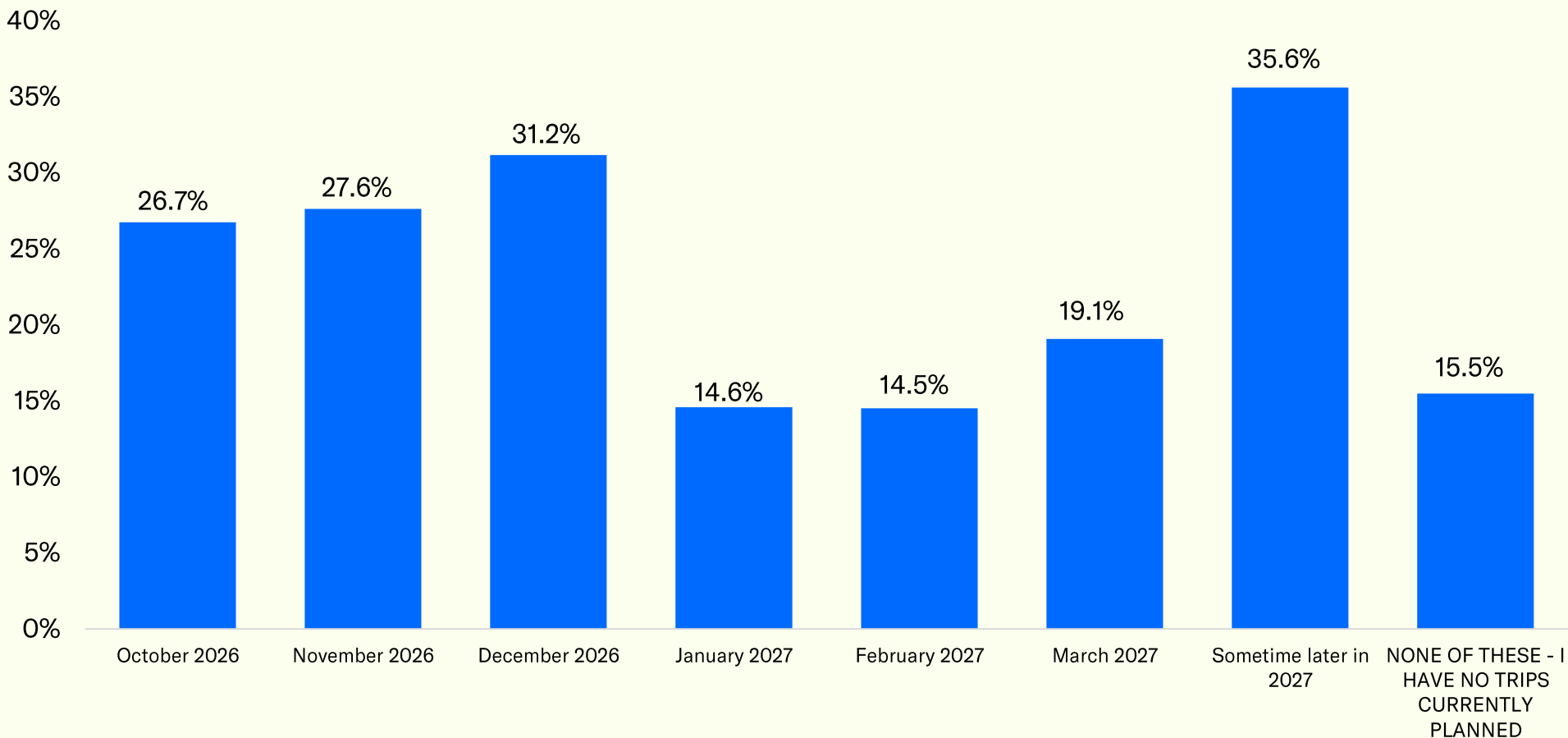
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



Travel plans are stretching further into 2027

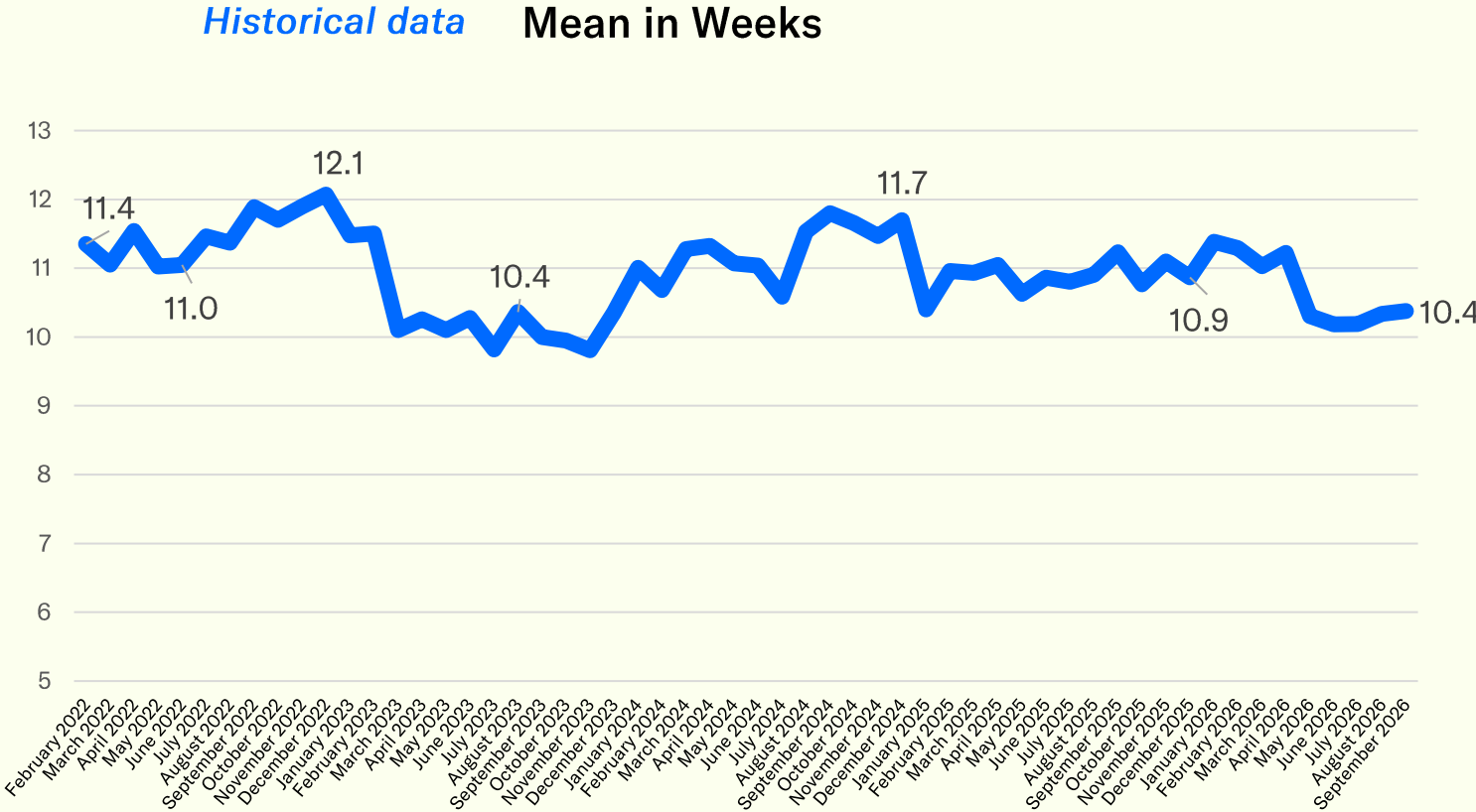
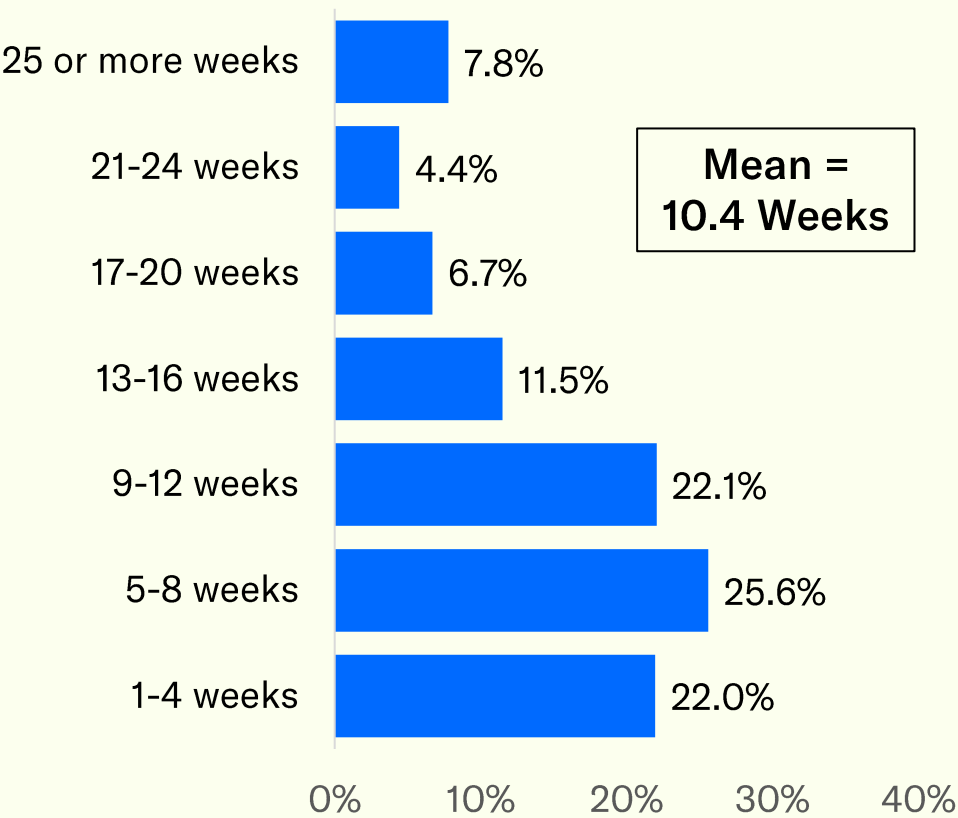
Question:

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



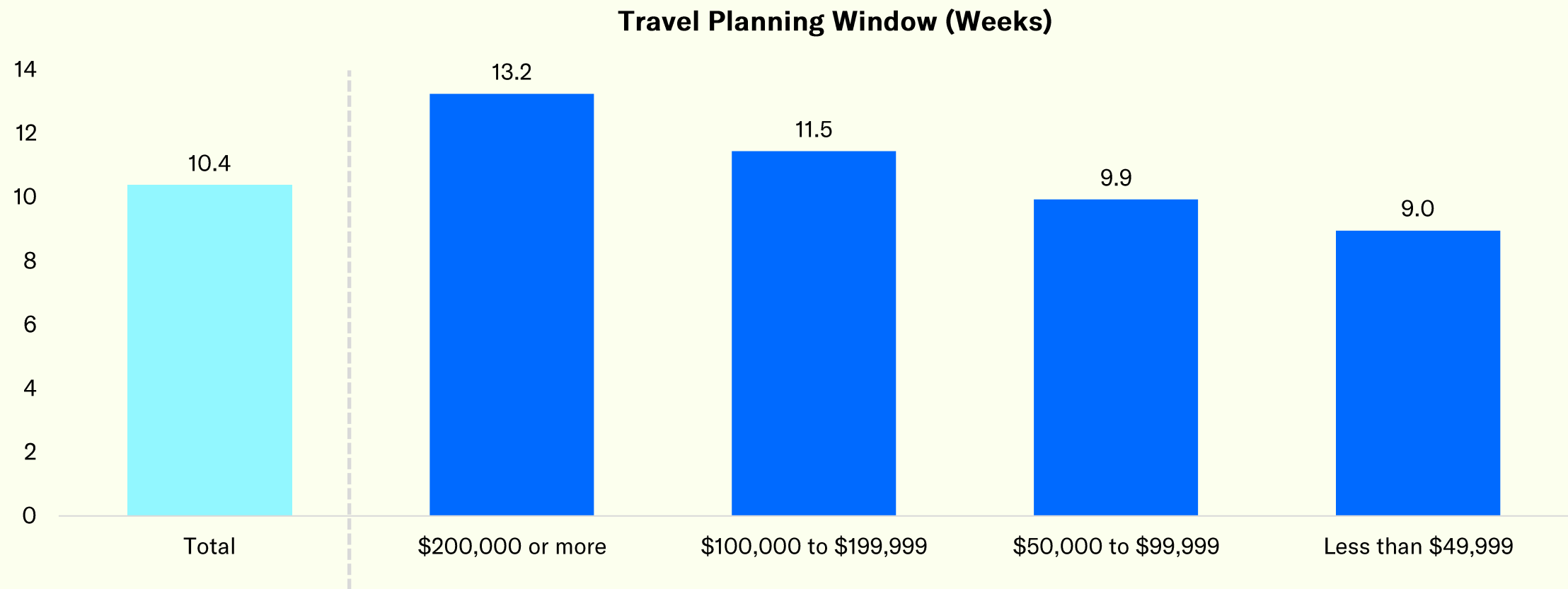
Travelers plan a week-long domestic trip about 10 weeks out

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



Lower-income travelers plan closer to departure, or not at all

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



A woman with long brown hair, seen from the back, is sitting on a stone ledge. She is wearing a yellow backpack and a yellow top. She is holding a white smartphone in her right hand and looking at it. The background shows a vast, hazy landscape with mountains and a small town below. The sky is blue with some clouds.

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

October 2026



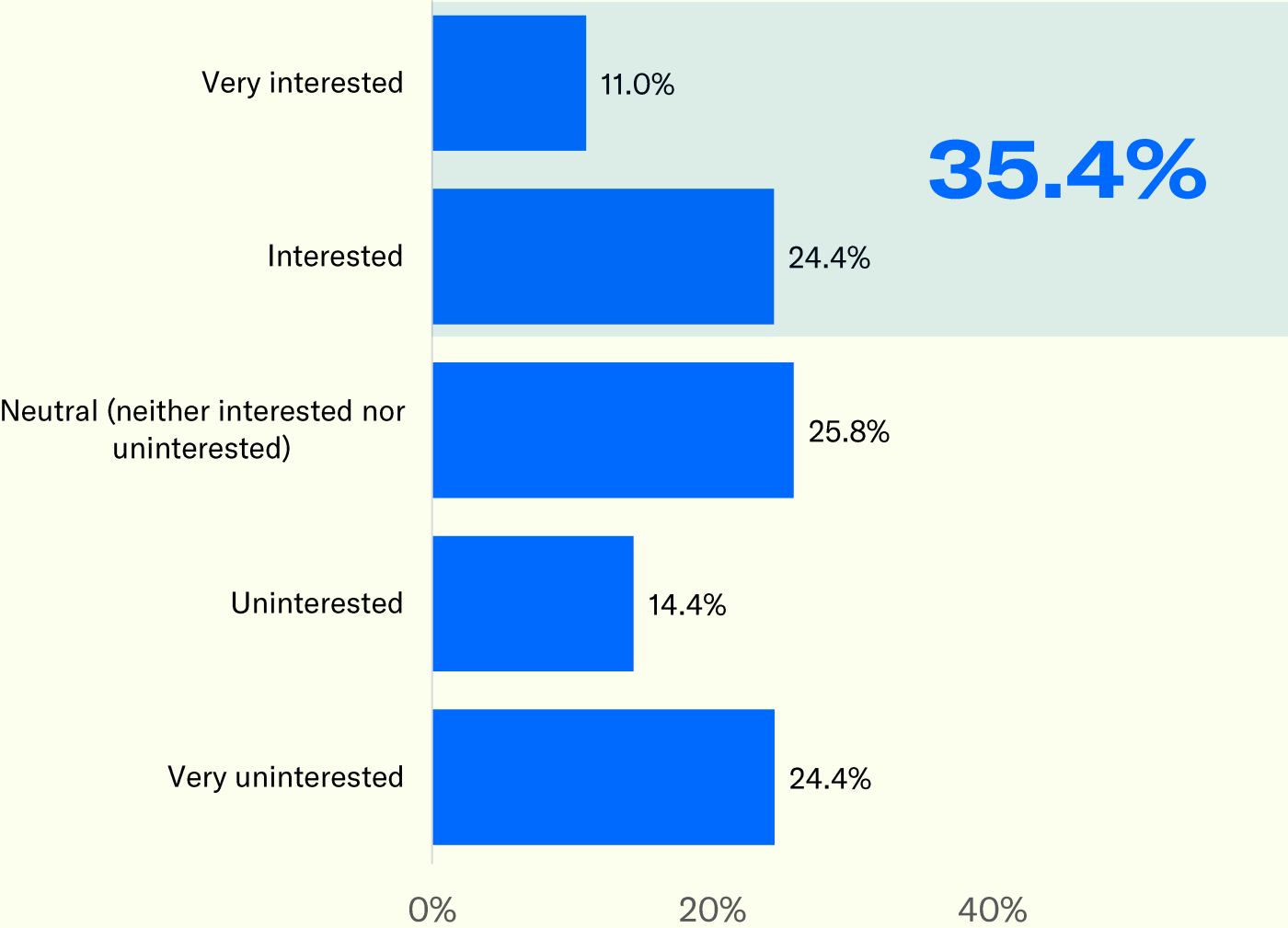
Set-Jetting



More than a third of travelers are interested in screen-inspired travel

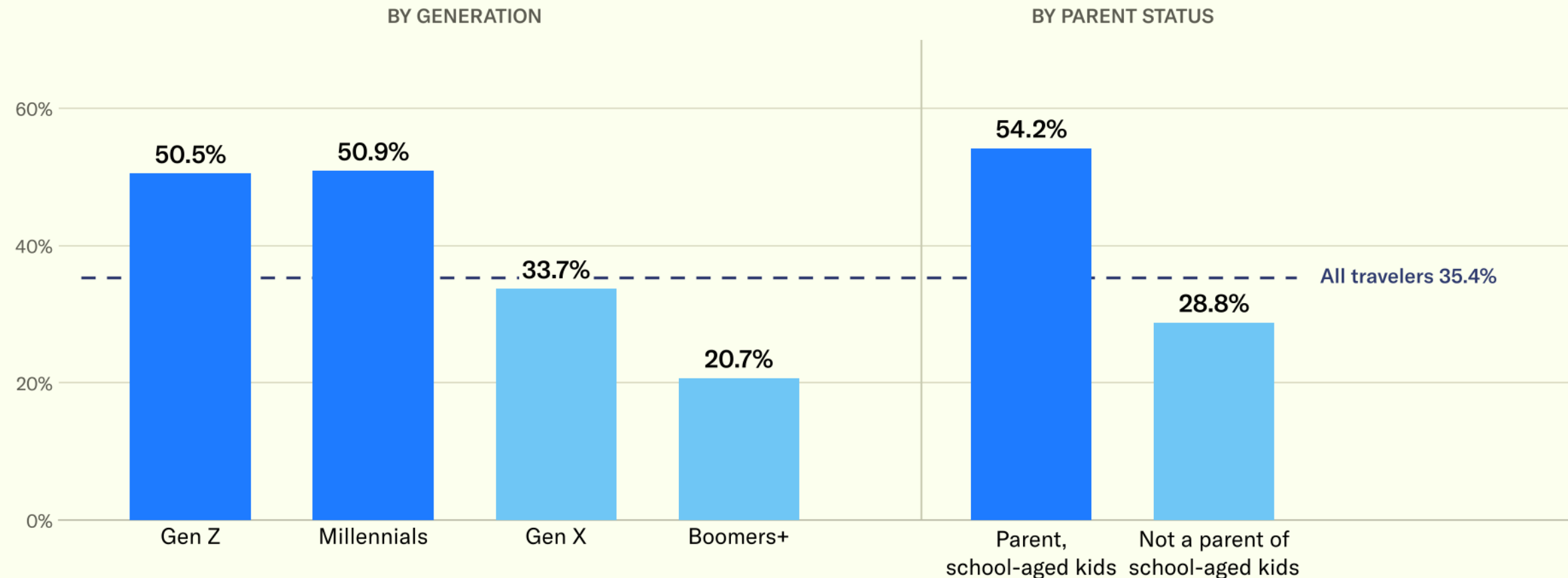
Question:

In general, how interested are you in traveling to a specific location(s) because it has been featured in a movie or TV series? (Select the option that best describes you)



Screen-Inspired Travel Is a Younger, Family-Driven Opportunity

Question: In general, how interested are you in traveling to a specific location because it has been featured in a movie or TV series?

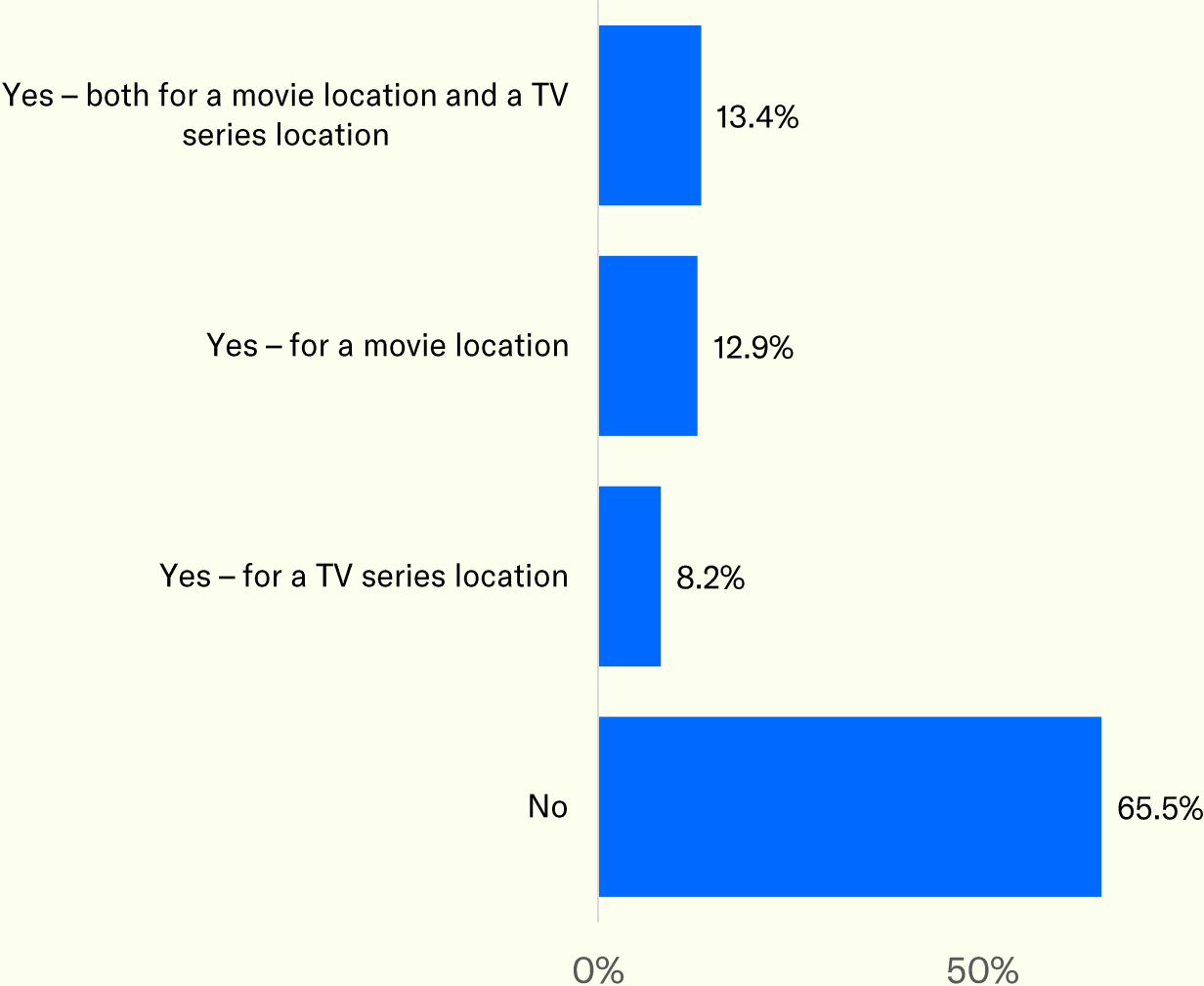


Millennials and Gen Z are about 2.5x as interested as Boomers, and parents of school-aged kids lead every cut.

A third of travelers have visited a place they saw on screen

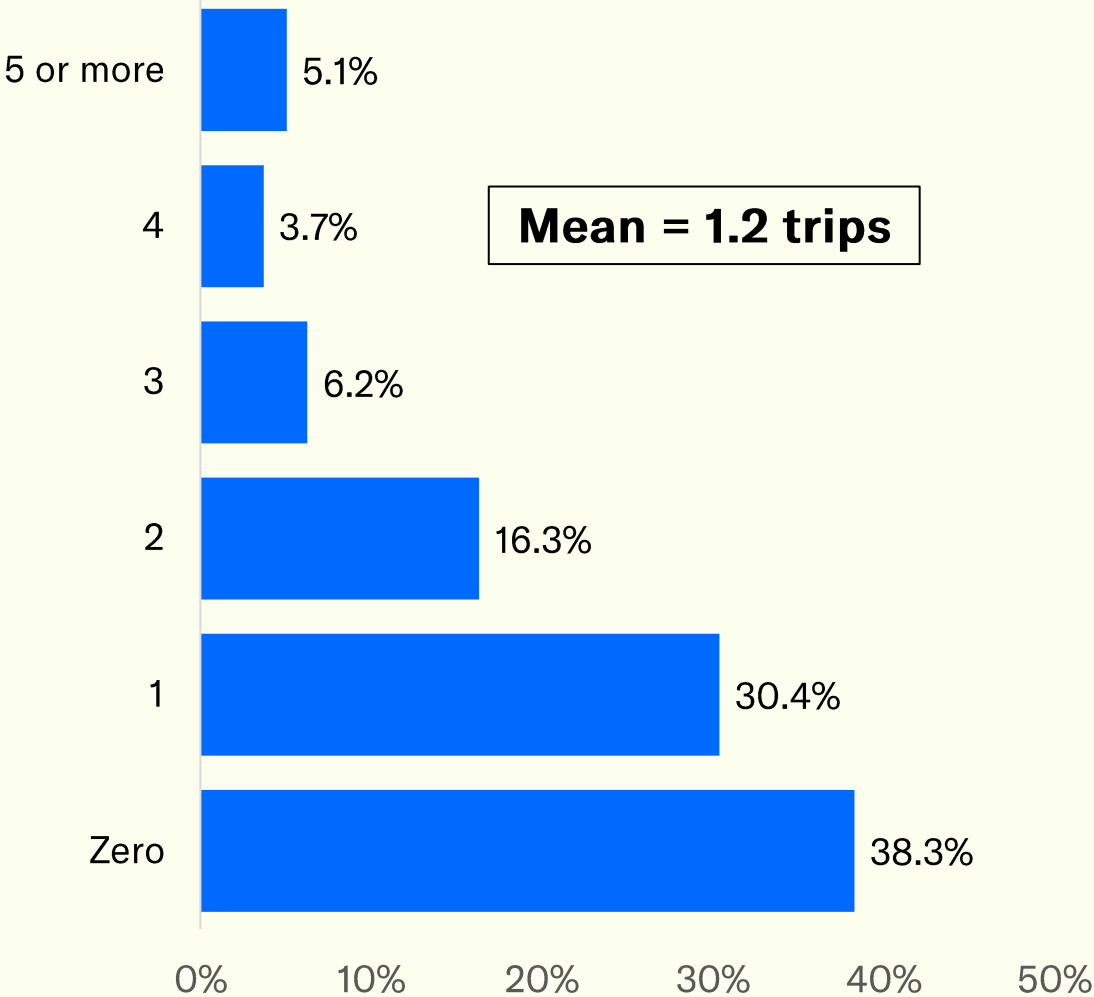
Question:

Have you ever visited a destination or attraction specifically because it was featured in a movie or TV series? (Select the option that best describes you)



Six in ten of these travelers made a screen-inspired trip in the past two years

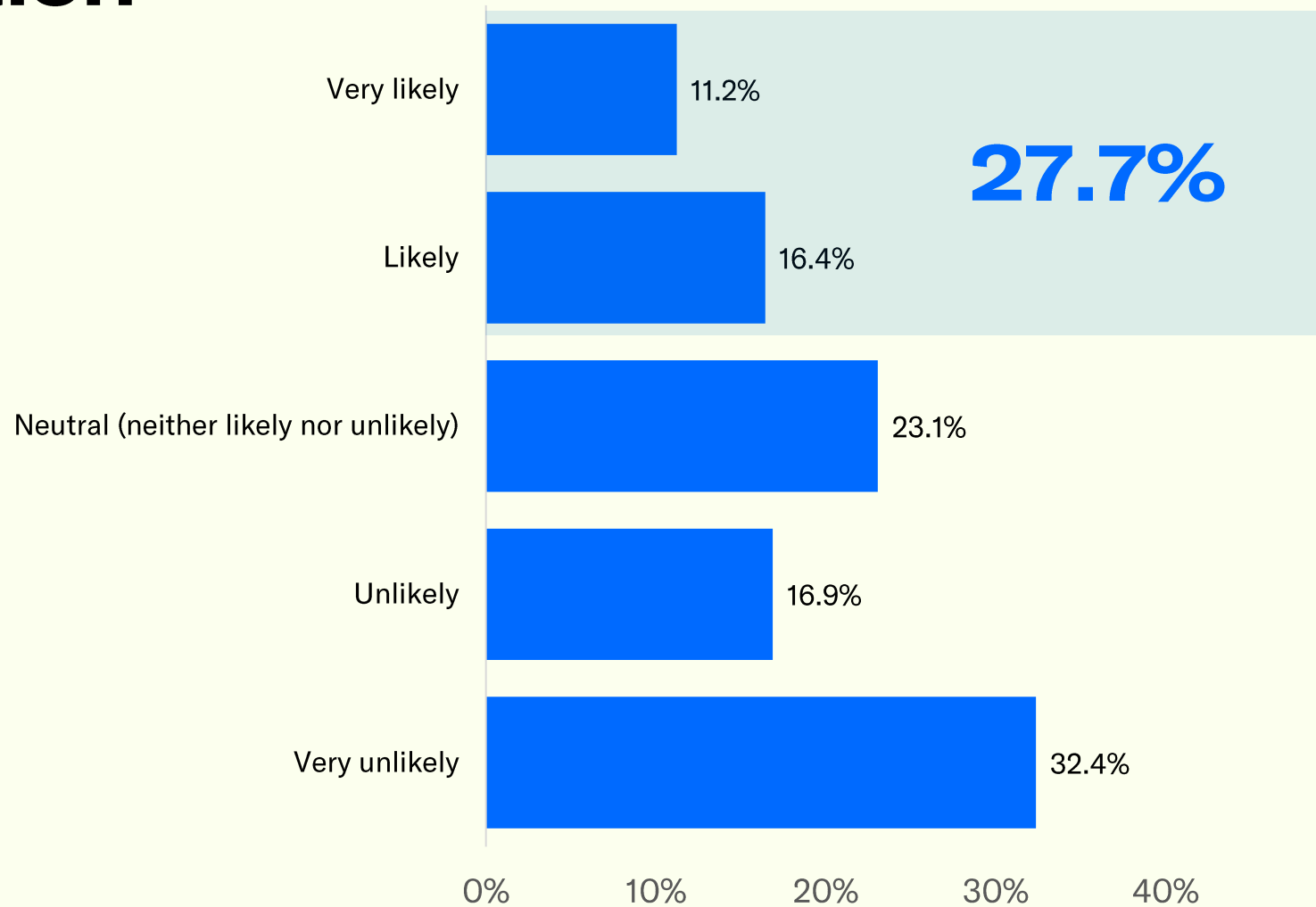
Question: In the past TWO (2) YEARS, how many times have you traveled 50 miles or more away from home specifically to visit a location featured in a movie or TV series?



More than one in four travelers are likely to visit a filming location

Question:

In the next TWO (2) YEARS, how likely are you to travel 50 miles or more away from home specifically to visit a location featured in a movie or TV series? (Select the option that best describes you)





Trip Planning Resources

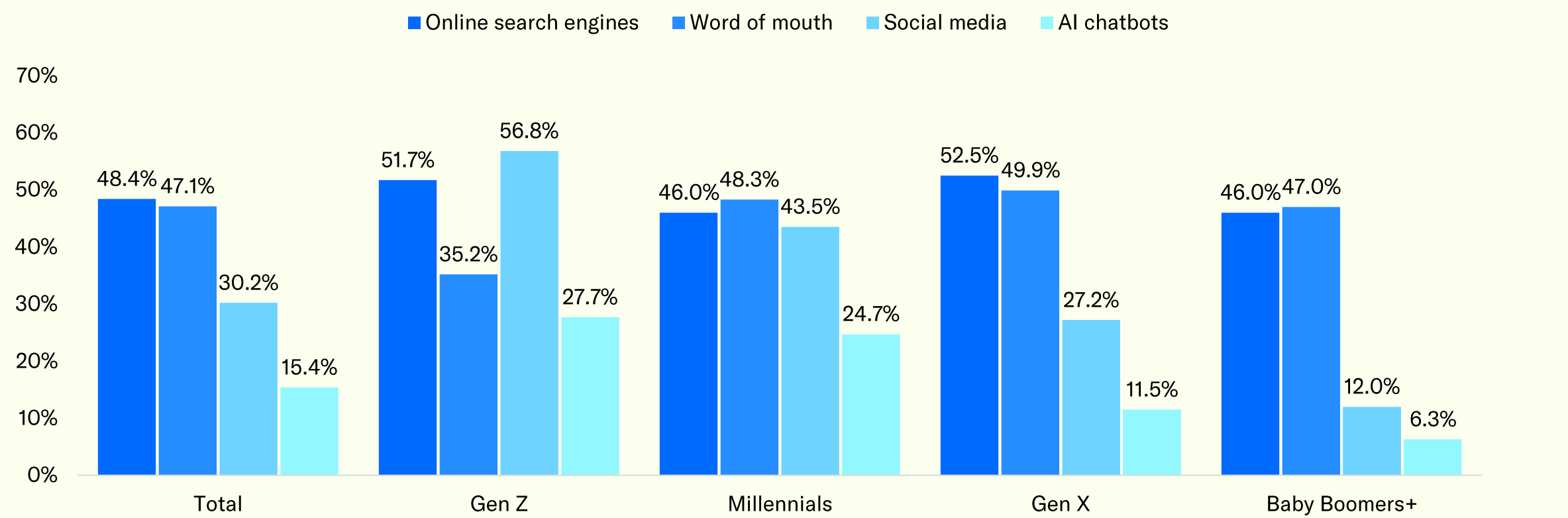
Search engines and word of mouth lead trip planning

Question: Tell us the resources you actually used planning your MOST RECENT OVERNIGHT TRIP. Which of these did you use? (Select all that apply)



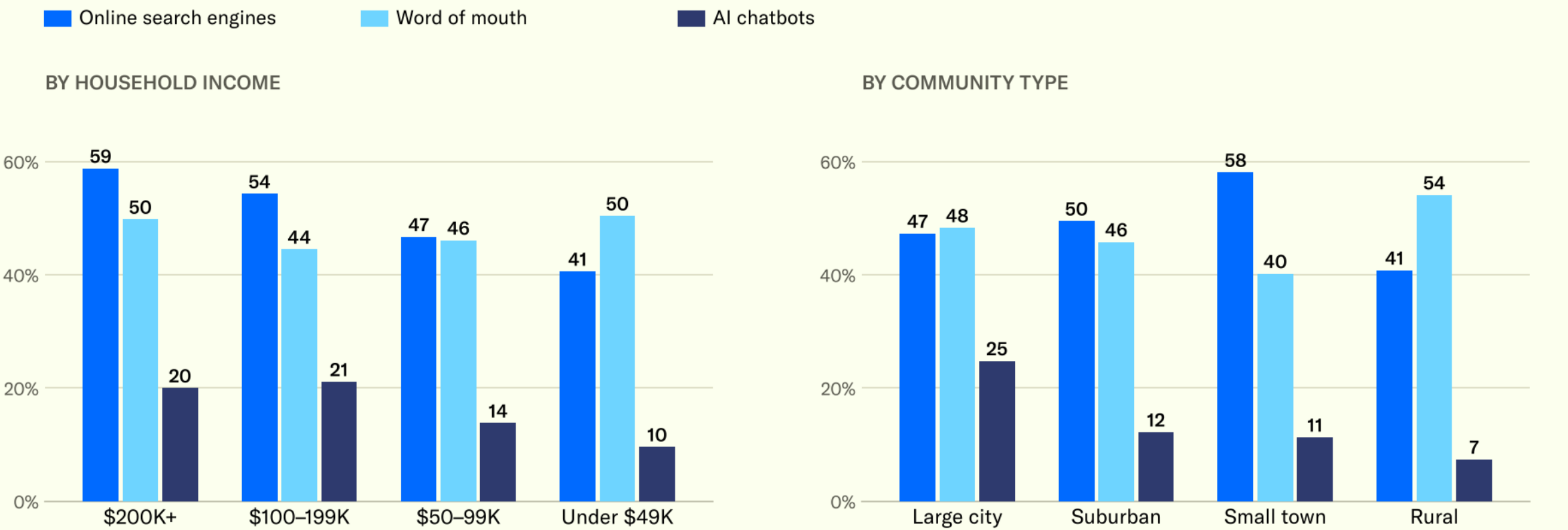
Gen Z turns to social media more than search to plan trips

Question: Tell us the resources you actually used planning your MOST RECENT OVERNIGHT TRIP. Which of these did you use? (Select all that apply)



Word of Mouth Is the Only Planning Resource That Reaches Everyone Equally

Question: Tell us the resources you actually used planning your MOST RECENT OVERNIGHT TRIP. Which of these did you use?
(Select all that apply)



BY HOUSEHOLD INCOME

Income Group	Online search engines	Word of mouth	AI chatbots
\$200K+	59	50	20
\$100–199K	54	44	21
\$50–99K	47	46	14
Under \$49K	41	50	10

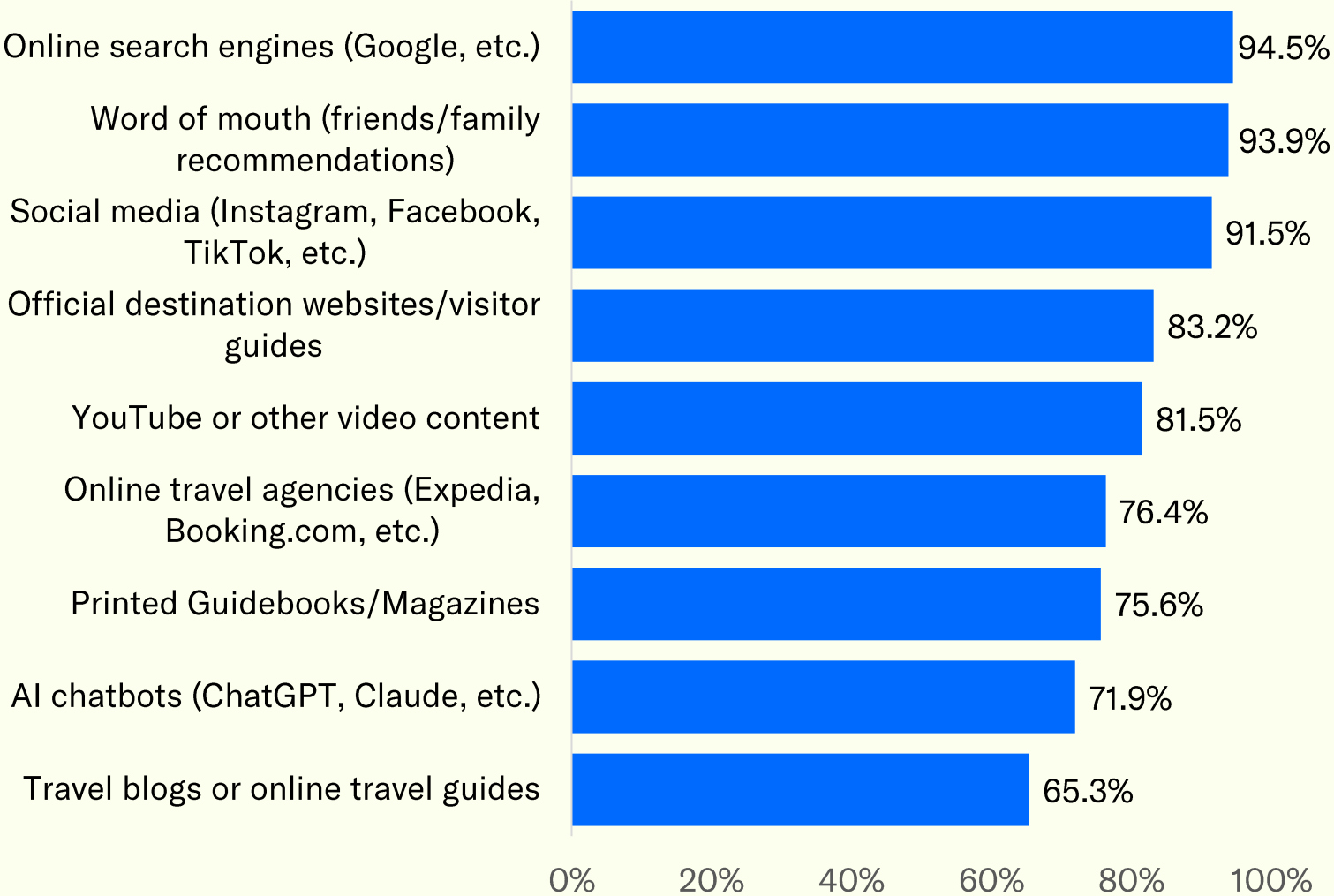
BY COMMUNITY TYPE

Community Type	Online search engines	Word of mouth	AI chatbots
Large city	47	48	25
Suburban	50	46	12
Small town	58	40	11
Rural	41	54	7

Search use falls 18 points from the highest to the lowest income group and AI use falls by half, but word of mouth barely moves — and peaks among rural travelers at 54.1%.

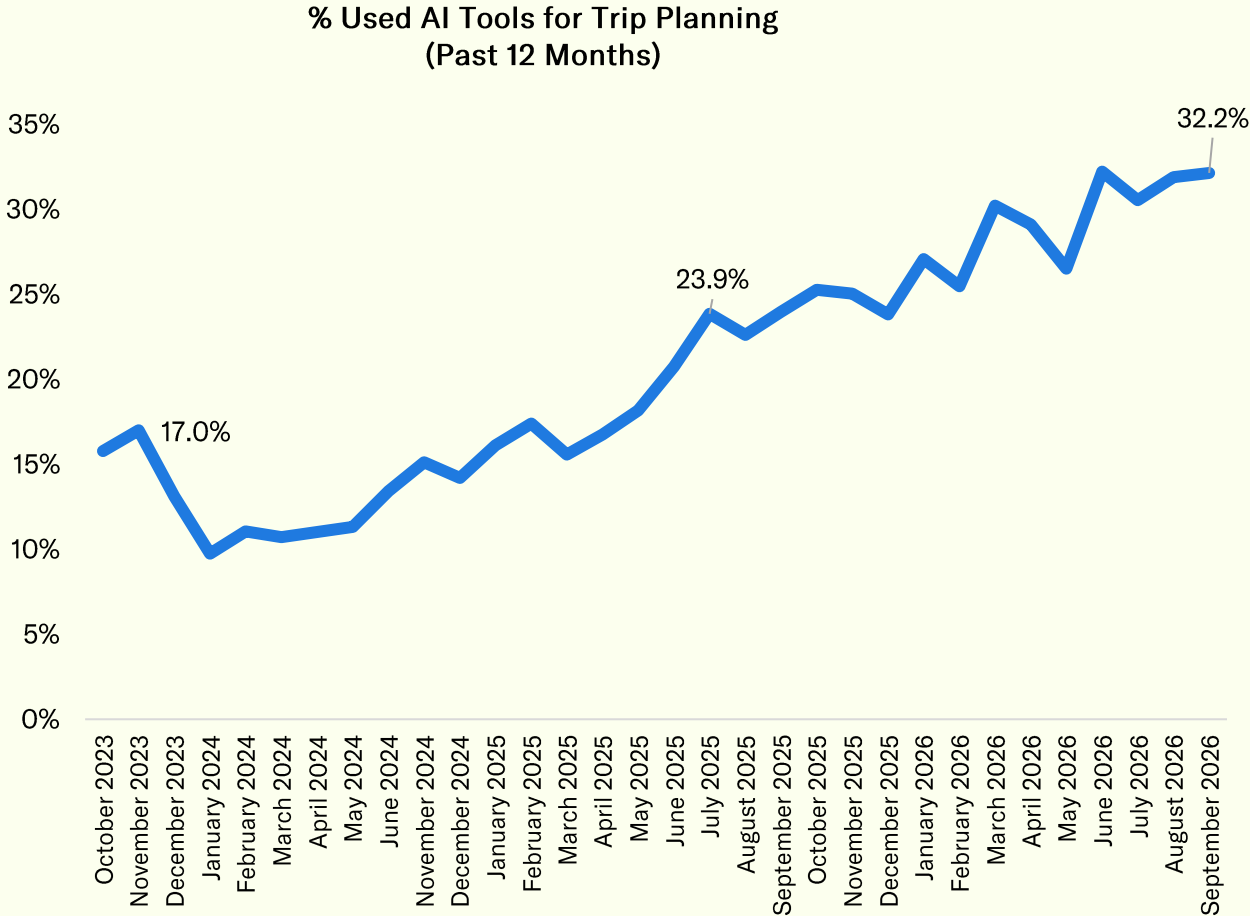
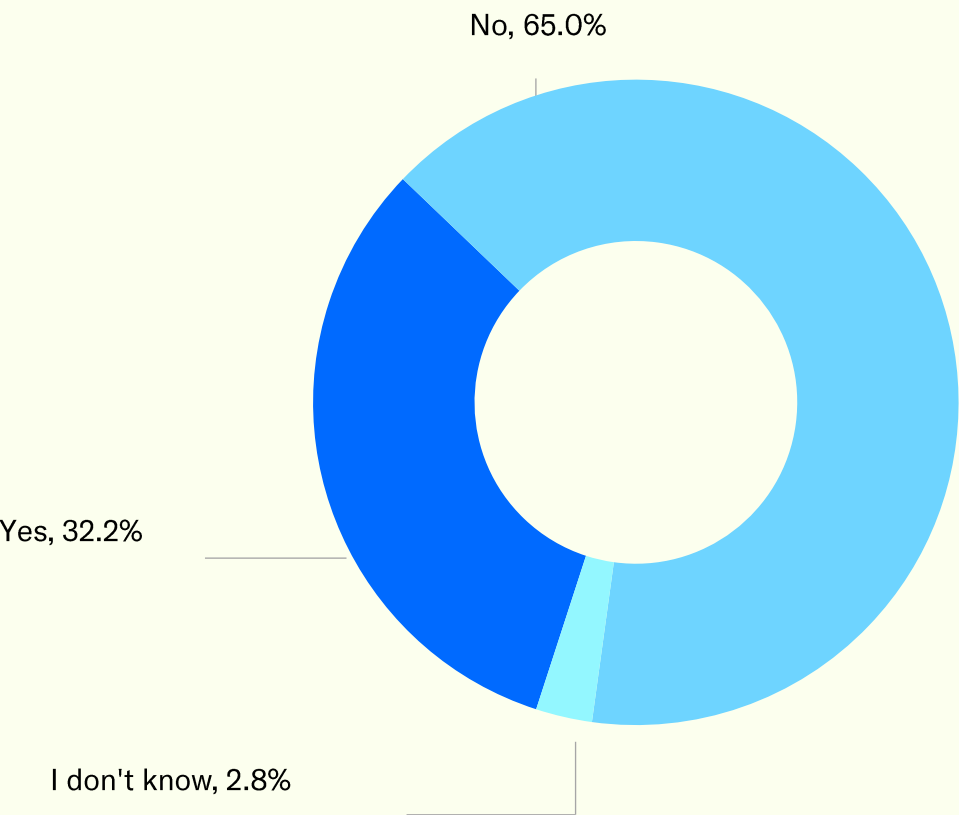
Search, word of mouth and social media open the planning process

Question: In what approximate order did you use these resources to plan your MOST RECENT TRIP?



Nearly a third of travelers now use AI to plan their trips

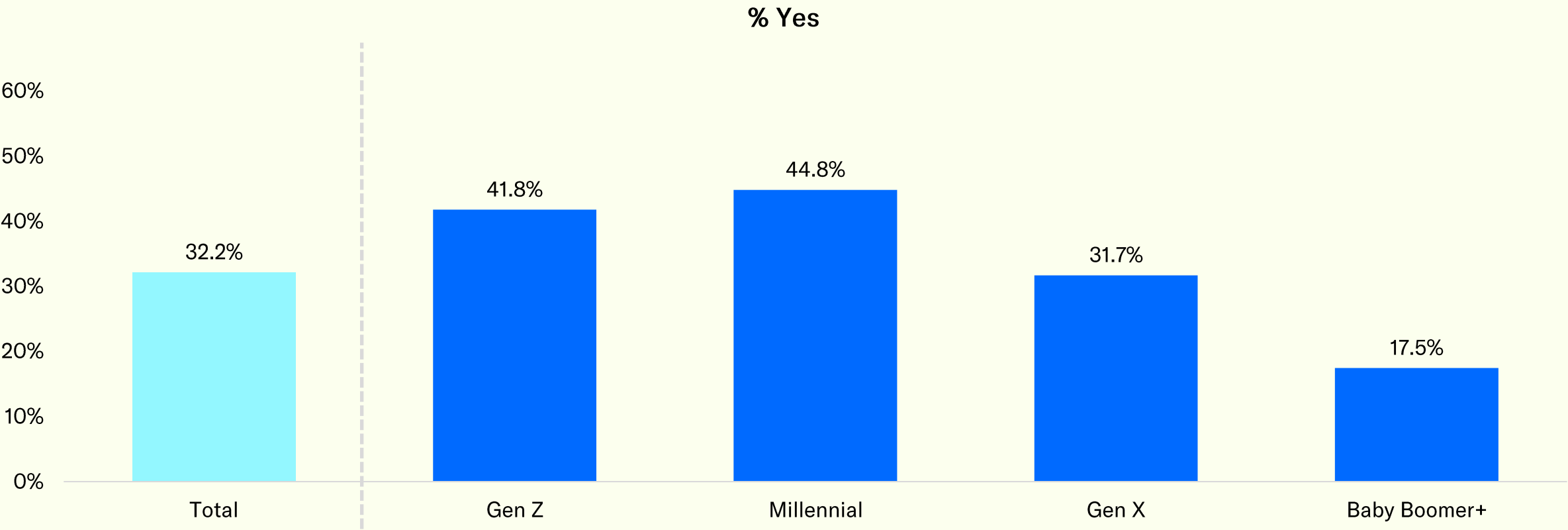
Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Millennials and Gen Z use AI for trip planning at more than twice the rate of Boomers

Question:

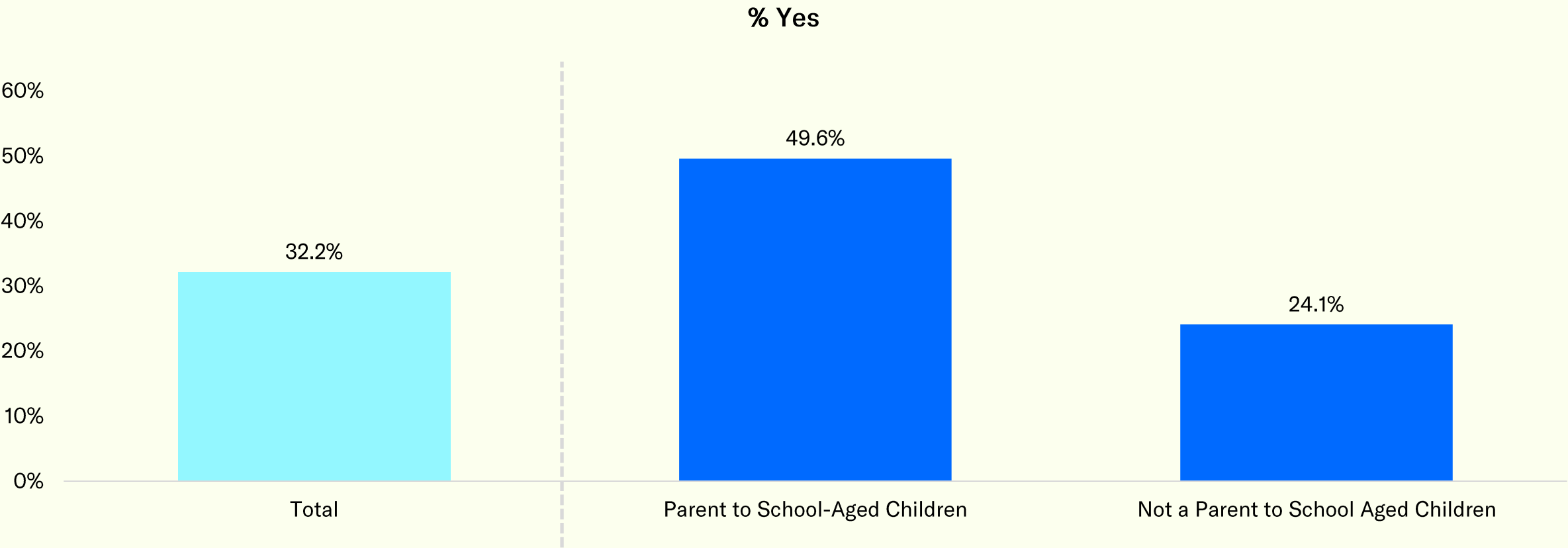
In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?



Half of parents with school-aged kids use AI to plan trips

Question:

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

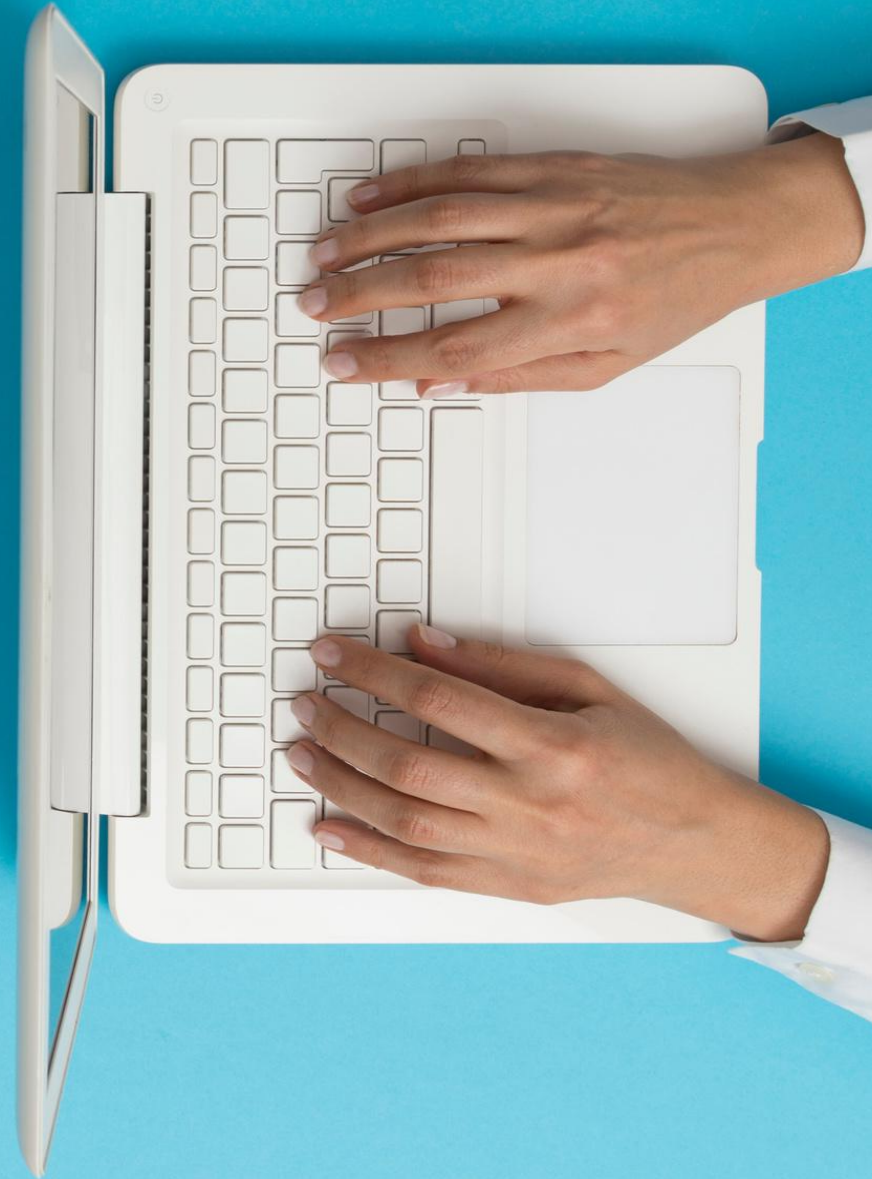


Website Relevancy Co-op

Understanding the Role of
Travel Websites in the Age of AI

info@futurepartners.com

Future Partners



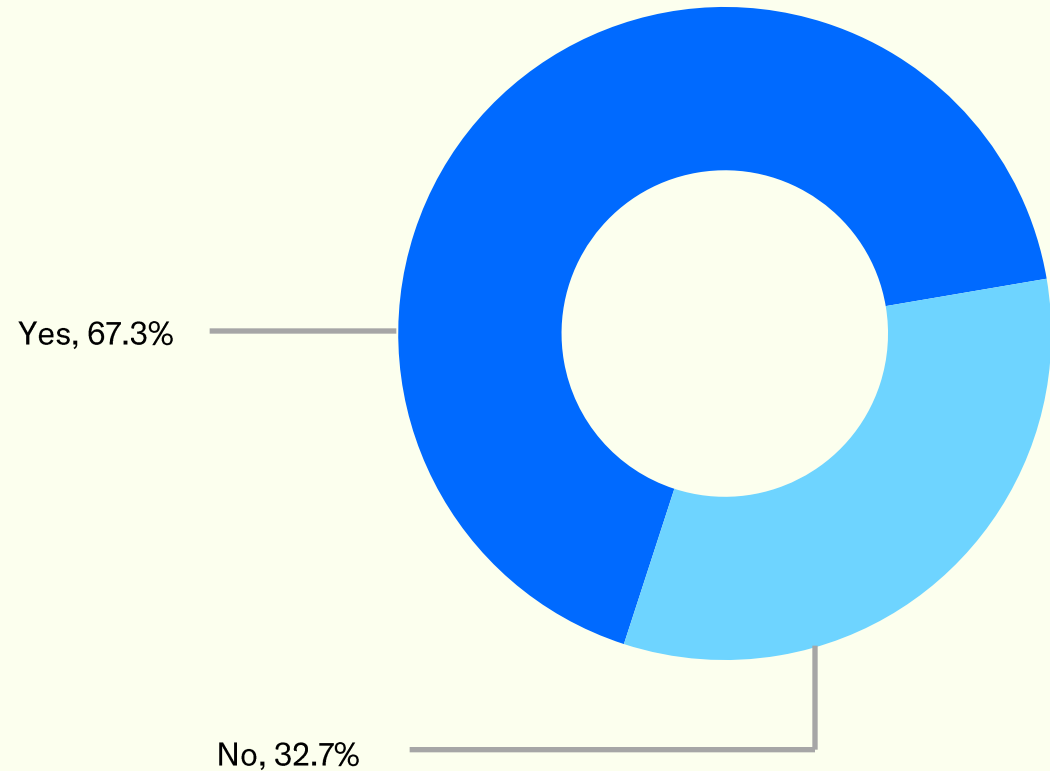


Airport Dining and Shopping

Two-thirds of air travelers ate at an airport restaurant

Question:

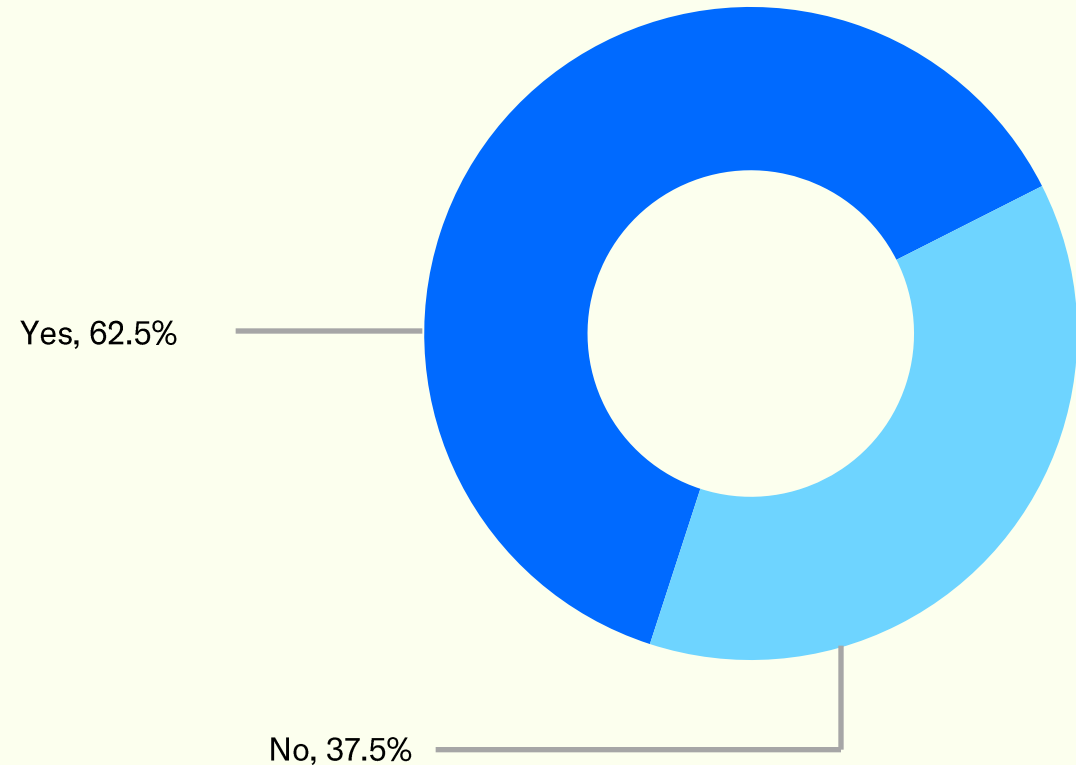
In the PAST 12 MONTHS, have you dined in a restaurant while in an airport?



Six in ten air travelers shopped at an airport store

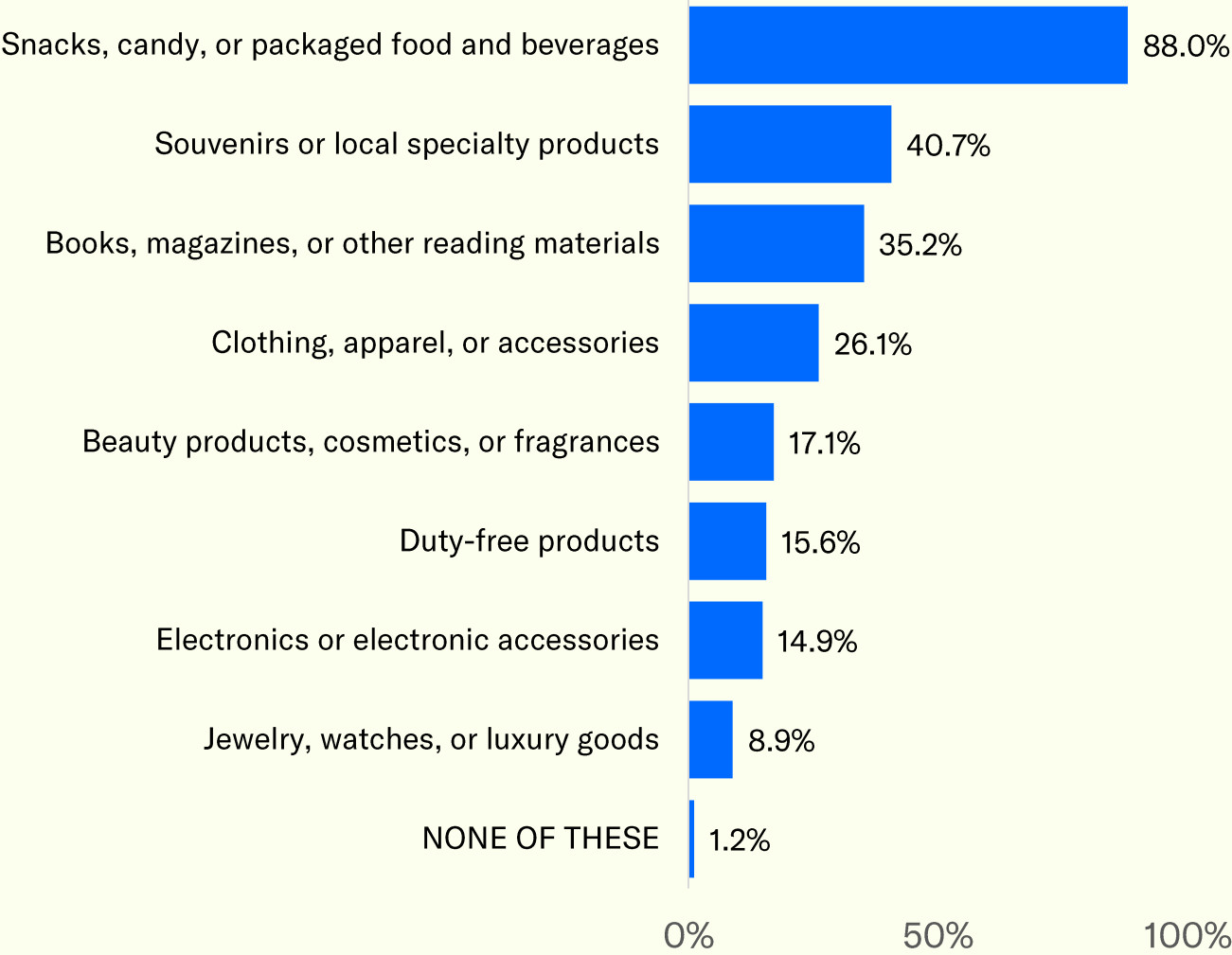
Question:

In the PAST 12 MONTHS, have you shopped at retail stores while in an airport?



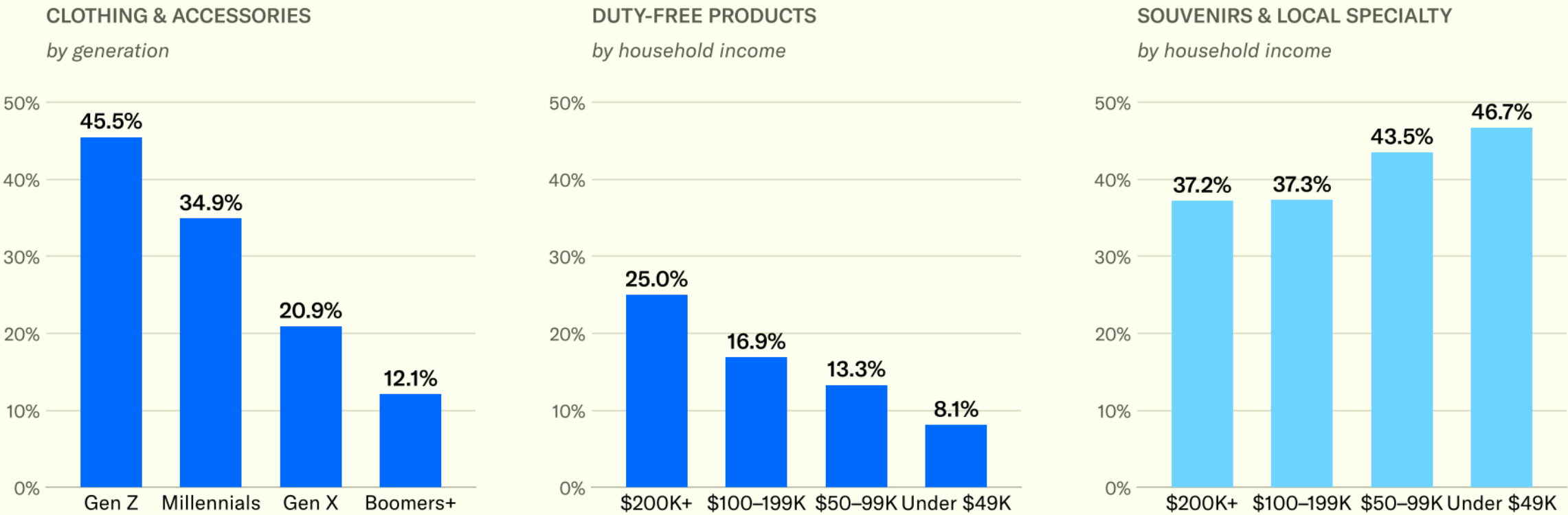
Snacks dominate airport purchases, bought by 88% of shoppers

Question:
In the PAST 12 MONTHS, which types of items have you PURCHASED FROM A RETAIL STORE AT AN AIRPORT? (Select all that apply)



What Travelers Buy at the Airport Splits Sharply by Age and Income

Question: In the PAST 12 MONTHS, which types of items have you PURCHASED FROM A RETAIL STORE AT AN AIRPORT? (Select all that apply)



Souvenirs and local specialty products are the one category lower earners buy MORE of — an opening for destination-branded airport retail.



Holiday Travel Plans

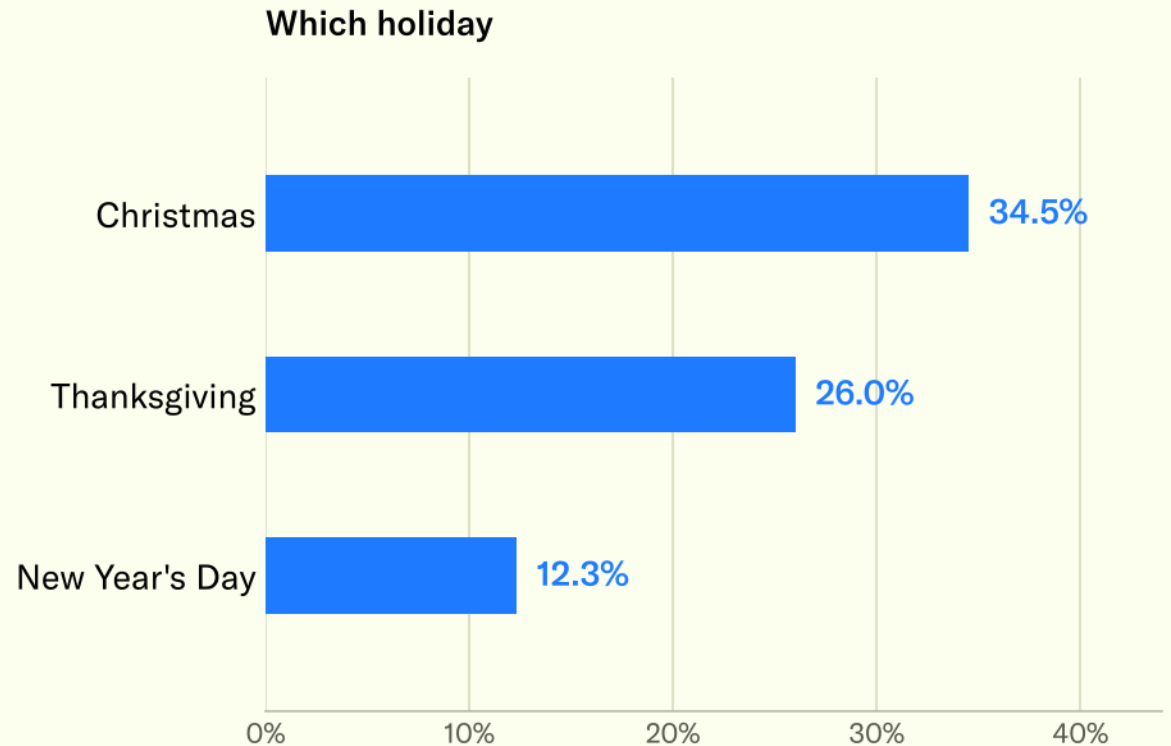
Half of American Travelers Have a Holiday Trip Planned

Question: Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays?

48.4%

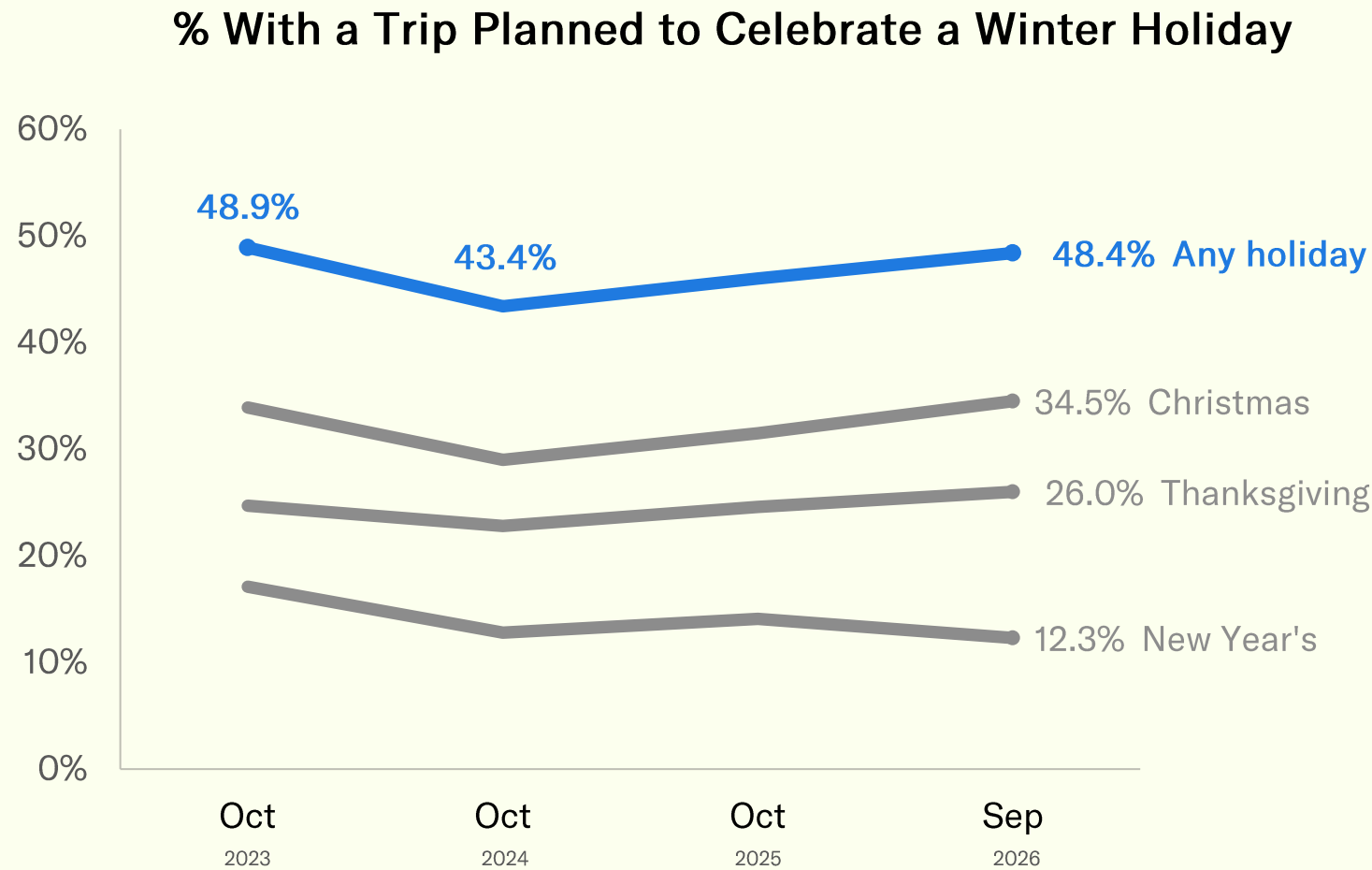
of American travelers have a trip of 50 miles or more planned to celebrate a holiday

Up from 33.8% in 2024, and back near the 2023 level



Holiday trip plans are back near their 2023 level

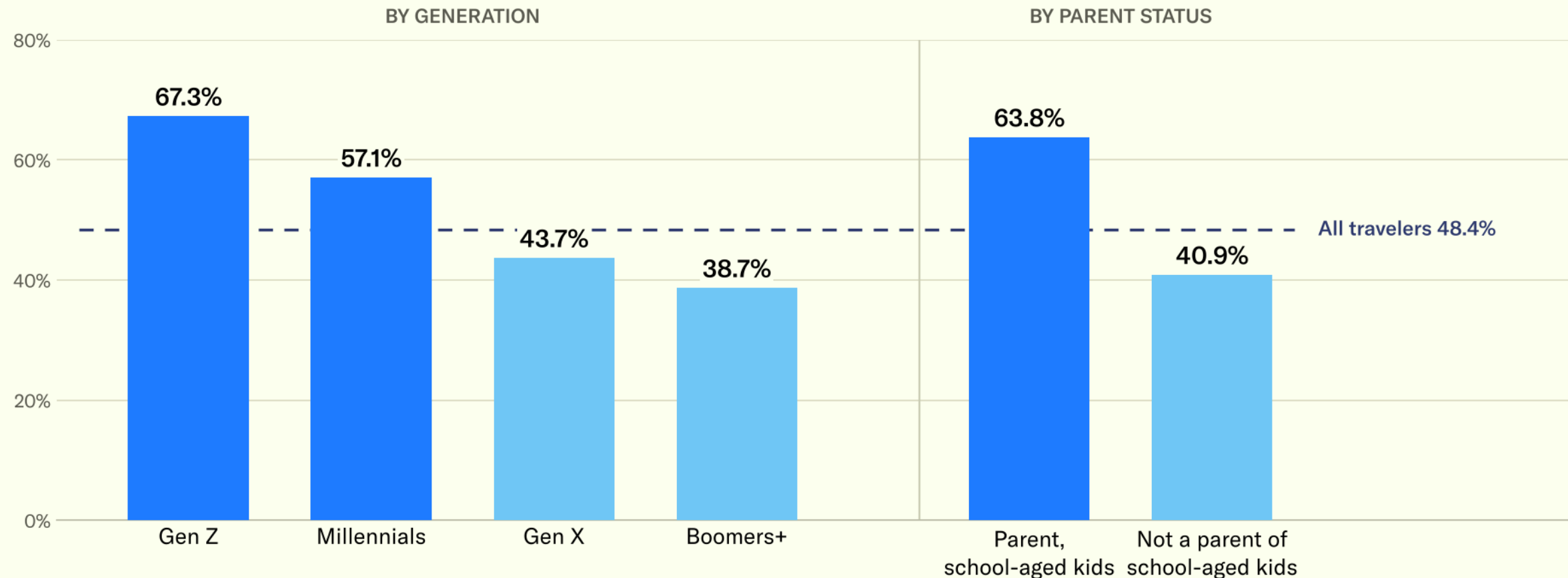
Question: Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays? (Select all that apply)



(Base: All respondents. Sep 2026: 1,017 completed surveys, data collected September 15-22, 2026; 2023-2025 waves: ~4,000 completed surveys each. Dec 2023 fielded after Thanksgiving.)

Holiday Travel Skews Young and Runs Through Households with Kids

Question: Do you have any trips (50 miles or more one-way from home) planned specifically to celebrate any of the following holidays?

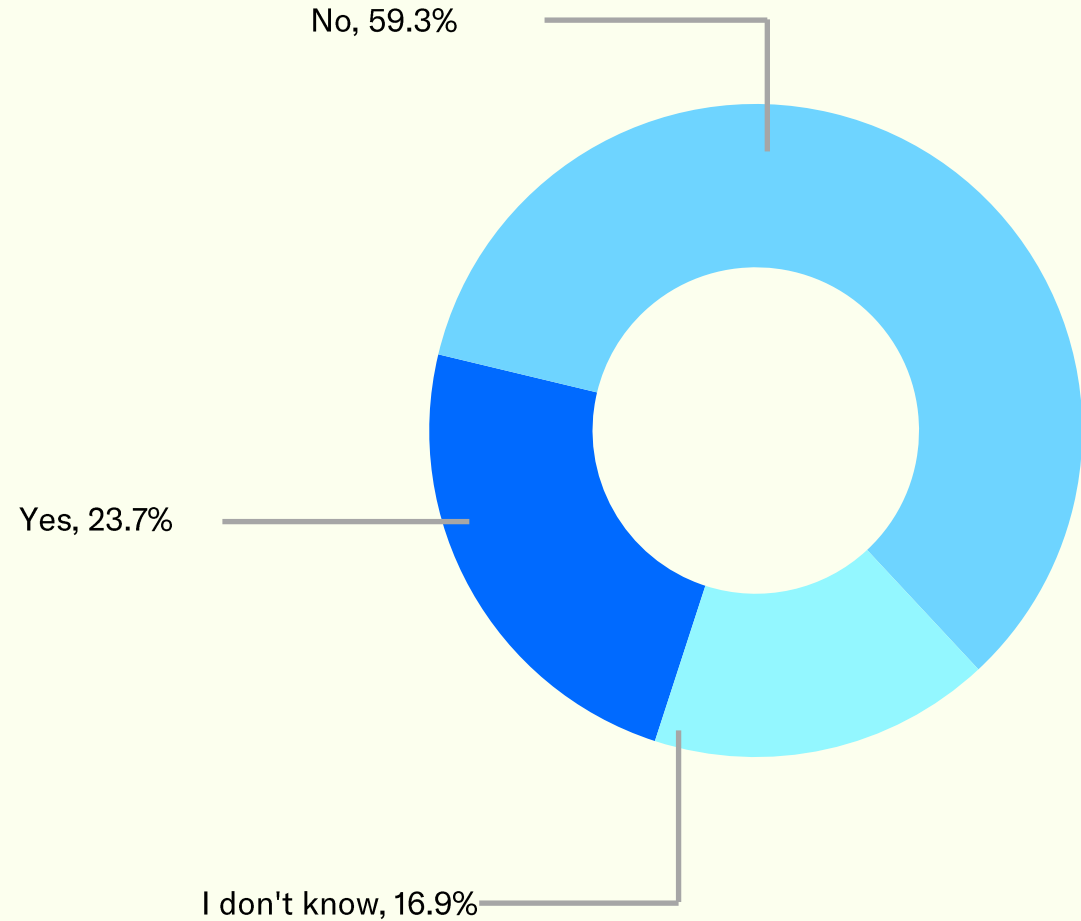


Gen Z and parents of school-aged children are roughly 1.5x more likely than the average traveler to have a holiday trip planned.

About a quarter of holiday travelers have a trip that isn't a family visit

Question:

Will any of these holiday trips NOT include visiting friends/relatives?



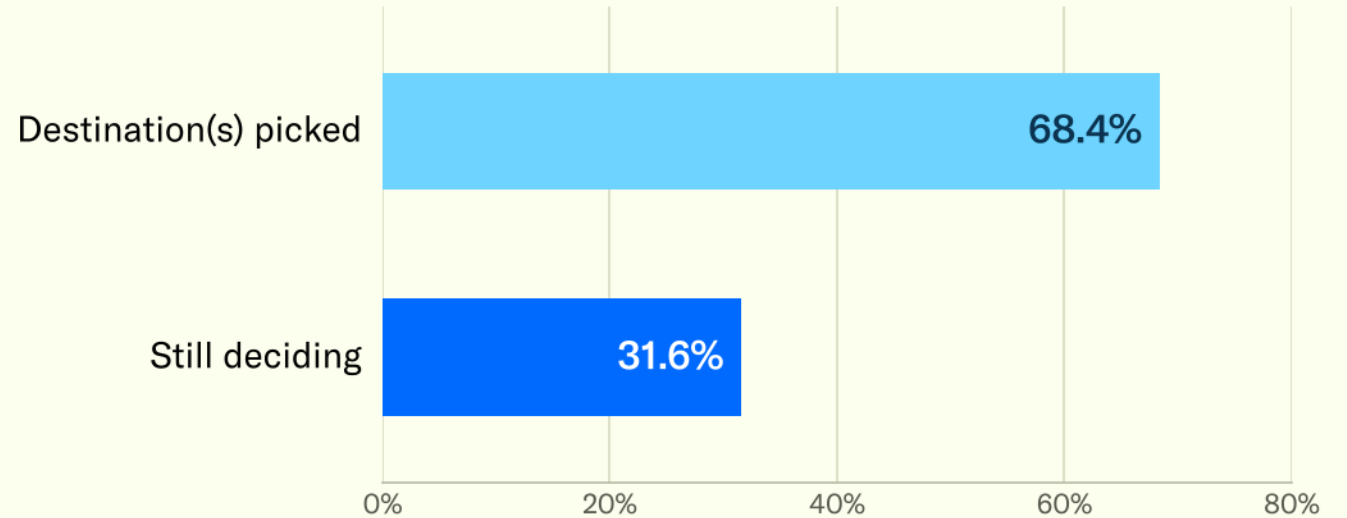
One in Three Holiday Travelers Still Hasn't Picked a Destination

Question: Have you made the decisions on where to travel to?

31.6%

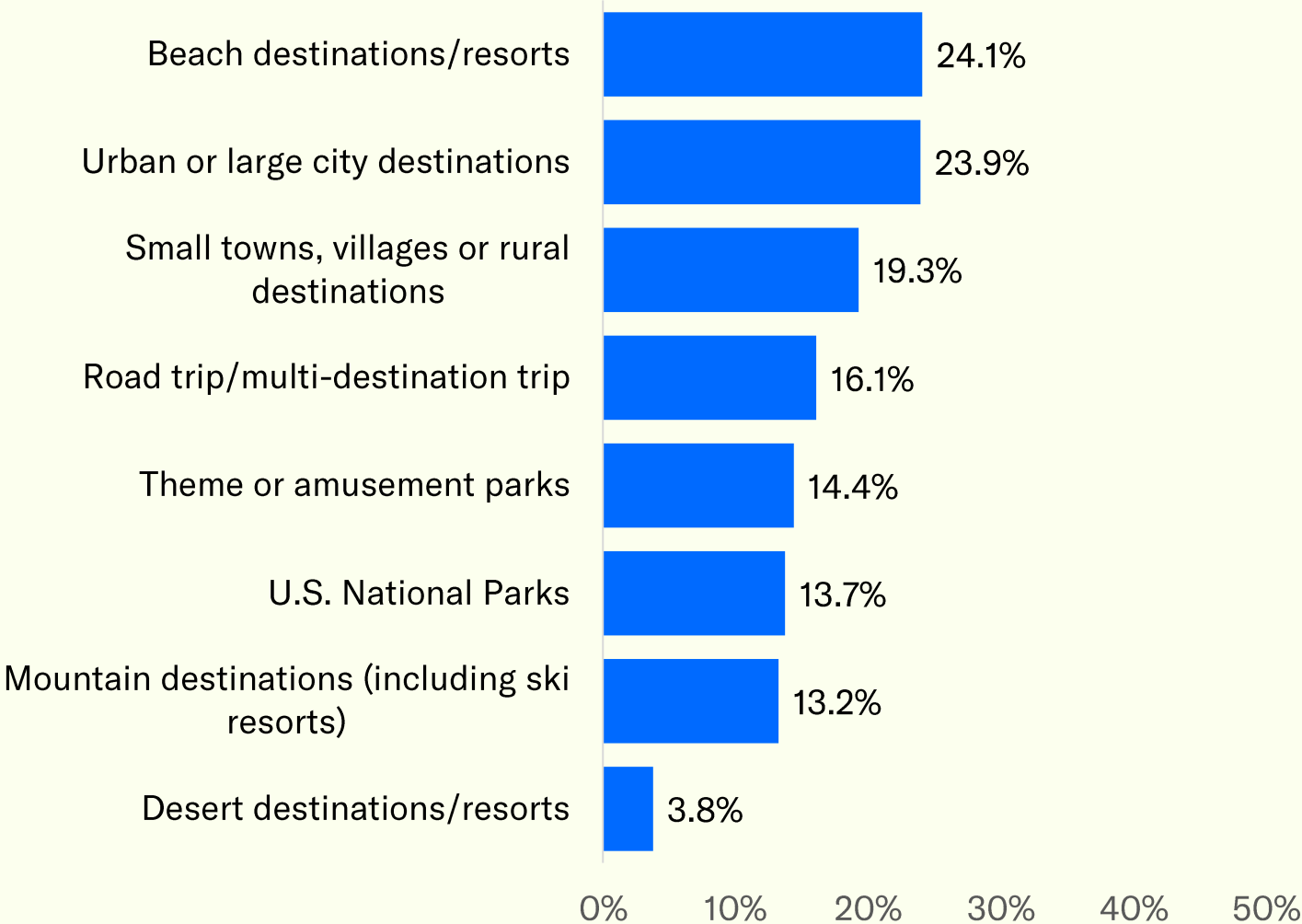
are still deciding where to go

A destination is still winnable for roughly a third of holiday travelers who are not simply visiting family.



Beaches and cities top the list of holiday destinations

Question: What type of destination(s) are you interested in visiting for the holidays? (Select all that apply)



(Base: All respondents, 772 completed surveys.
Data collected September 15-22, 2026.)

Key Takeaways

- **Financial confidence is slipping.** Just 31.7% feel better off than a year ago, and 48.5% expect a recession, the highest since May.
- **Travel is still running ahead of last year.** 57.3% took an overnight leisure trip last month, up from 49.6% a year ago.
- **Income prominently decides who is spending.** Top earners budget \$13,600 for travel against \$2,008 for the lowest earners, and 46.0% of lower earners say gas prices held them back.
- **Holiday plans are back near their 2023 high.** 48.4% have one planned, up from 46.0% last year.
- **AI is already present in trip planning.** Search and word of mouth are the strongest channels, but 15.4% have used AI to plan their latest trip.
- **Screen-inspired travel is sizable and skews young.** 34.5% have visited a filming location; Gen Z leads at 52.2%.

Let's keep the conversation going



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Livestream Calendar

The State of the North American International Traveler Webinar

*A Profile of American &
Canadian Outbound Travelers*

Future Partners

October 27th, 2026

8am PT/11 am ET/5 pm CET



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5 Continents
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Europe:

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

Asia-Pacific:

Australia, China, India, Japan, South Korea

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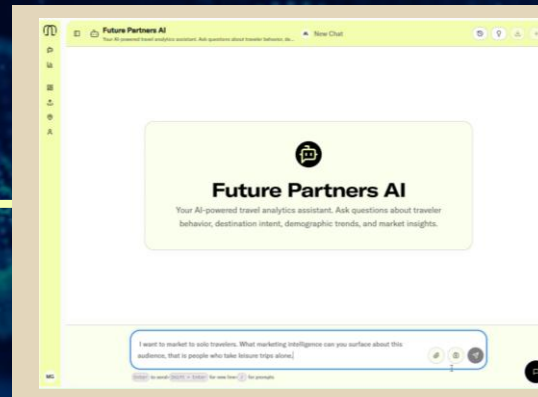
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