

Future Partners

A group of people are sitting around a campfire at dusk by a lake. The sky is a deep blue with some clouds, and the water reflects the light from the fire. A tent is visible on the left side of the image. The overall atmosphere is peaceful and scenic.

The State of the
American Traveler

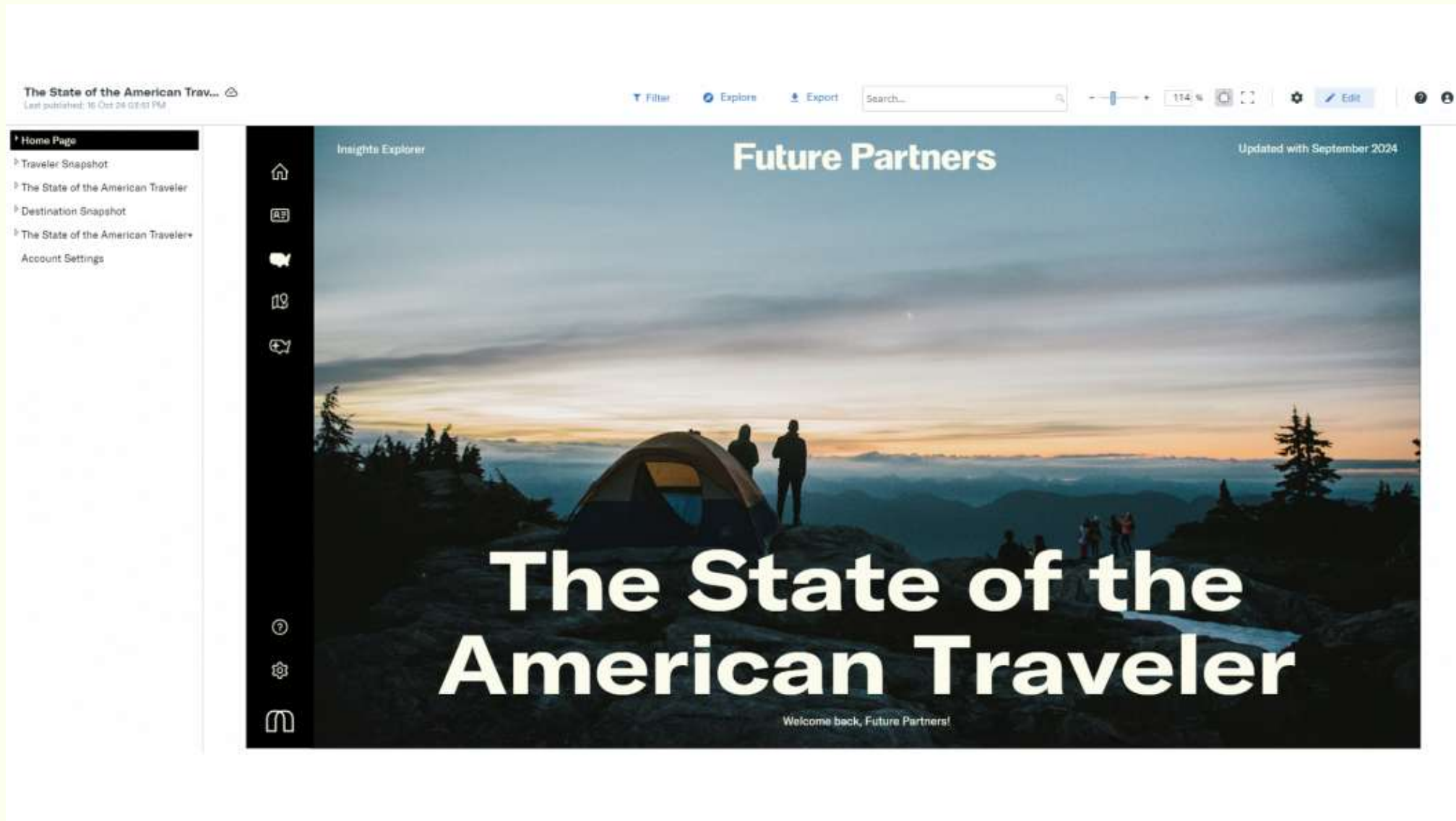
The State of the American Traveler

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: [February 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*



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Upcoming Deep Dive:
The State of the American Traveler
Destinations Edition 2025

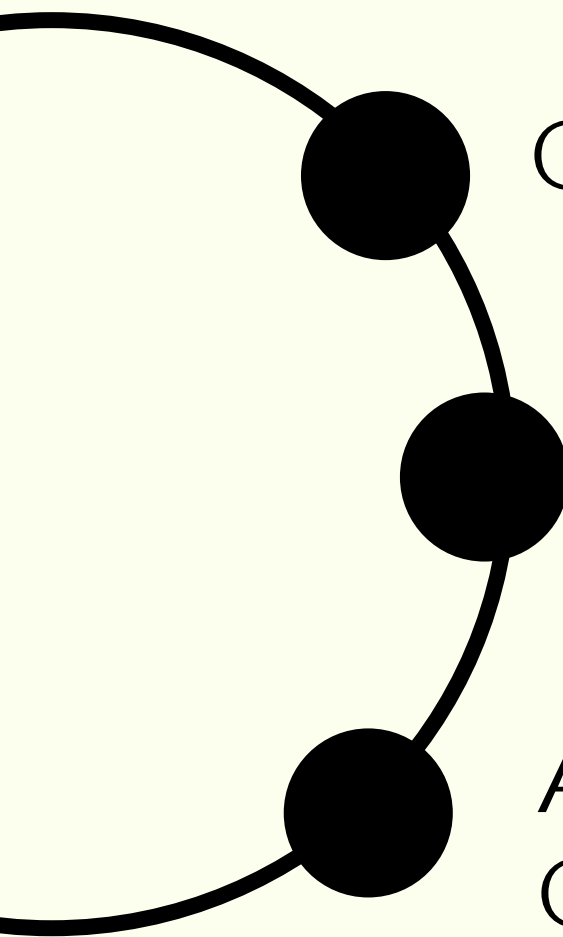
With Miles Partnership

*March 18th 3:00pm PT
Register Today*

Uncover the latest trends shaping how U.S. travelers decide where to go



Today



Current Travel Sentiment

The Outlook for Summer Travel

A Conversation with
Canadian Travelers

*April Livestream
Registration*



Traveler Sentiment

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What we see in the data:

- Despite extraordinary uncertainty, traveler sentiment remains largely positive right now
- **Nevertheless, travelers' concerns about the future are clearly evident and deepening, signaling caution ahead**

POLITICS

US tariffs take effect and Mexico, Canada and China retaliate with their own tariffs on the US

ECONOMY

The first quarter is on track for negative GDP growth, Atlanta Fed indicator says

PUBLISHED FRI, FEB 28 2025•2:56 PM EST

MONEYWATCH

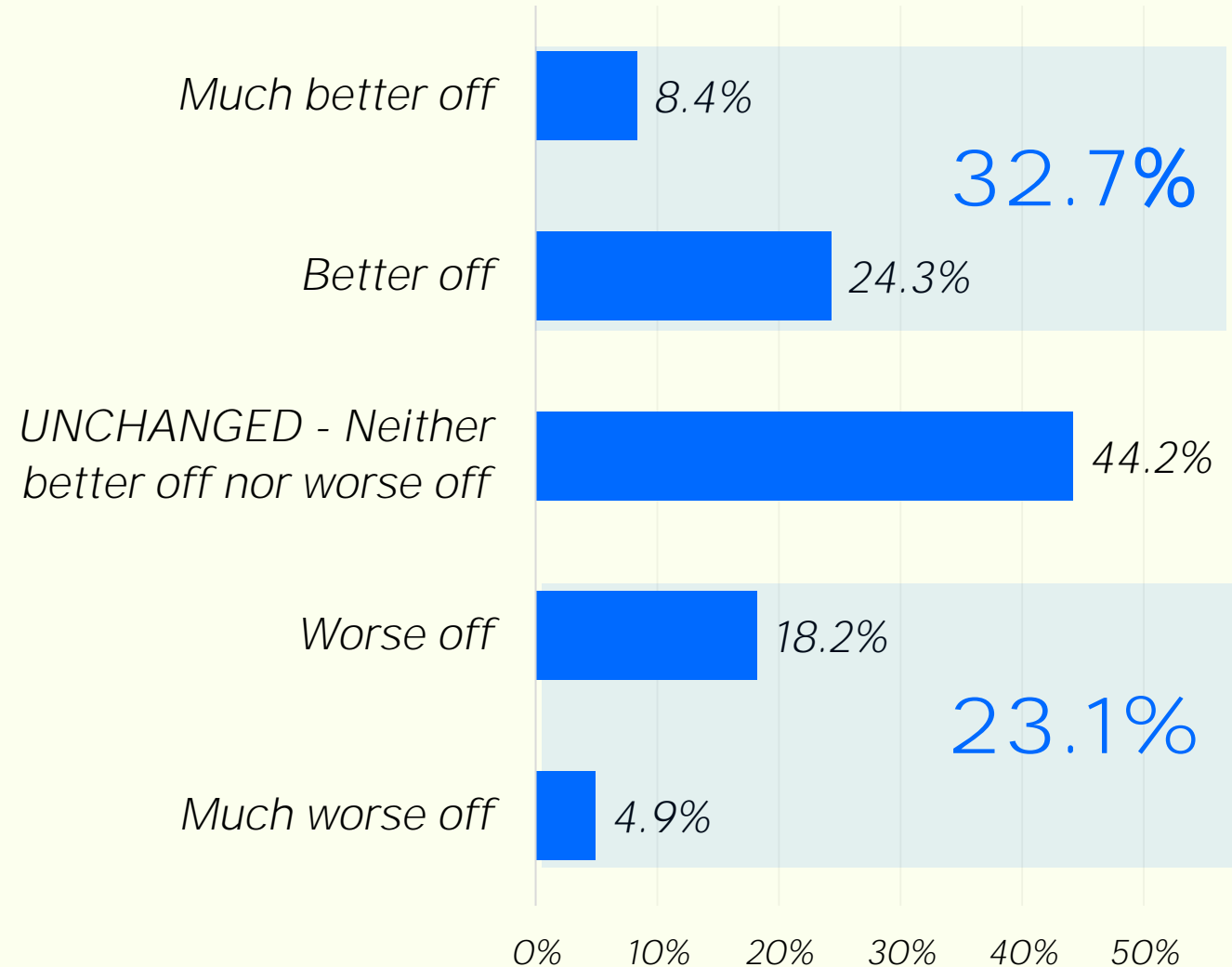
Consumer confidence plunged in February amid rising economic concerns

32.7% of American travelers feel their current financial situation is improved over last year

Question:

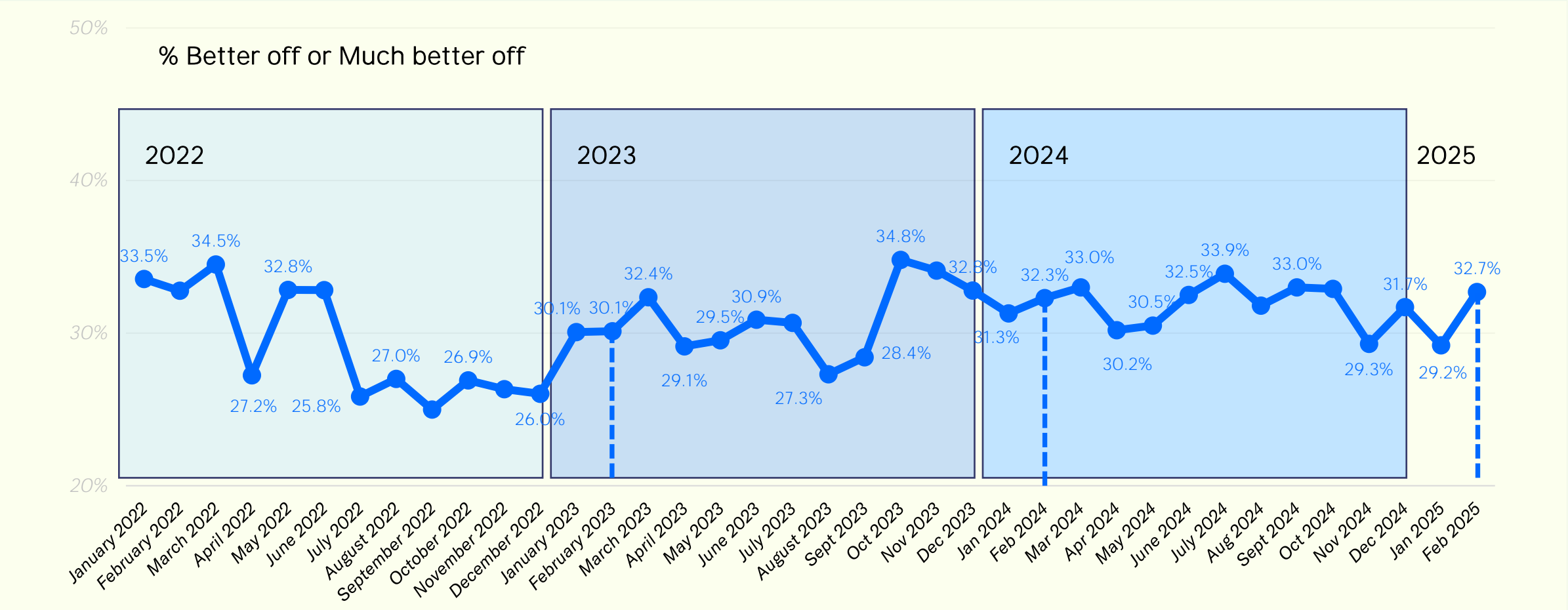
Would you say that you (and your household) are better off or worse off financially than you were a year ago?

Base: All respondents, 4,000 completed surveys



Assessment of their current financial situation improved this month and are on par with last year

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

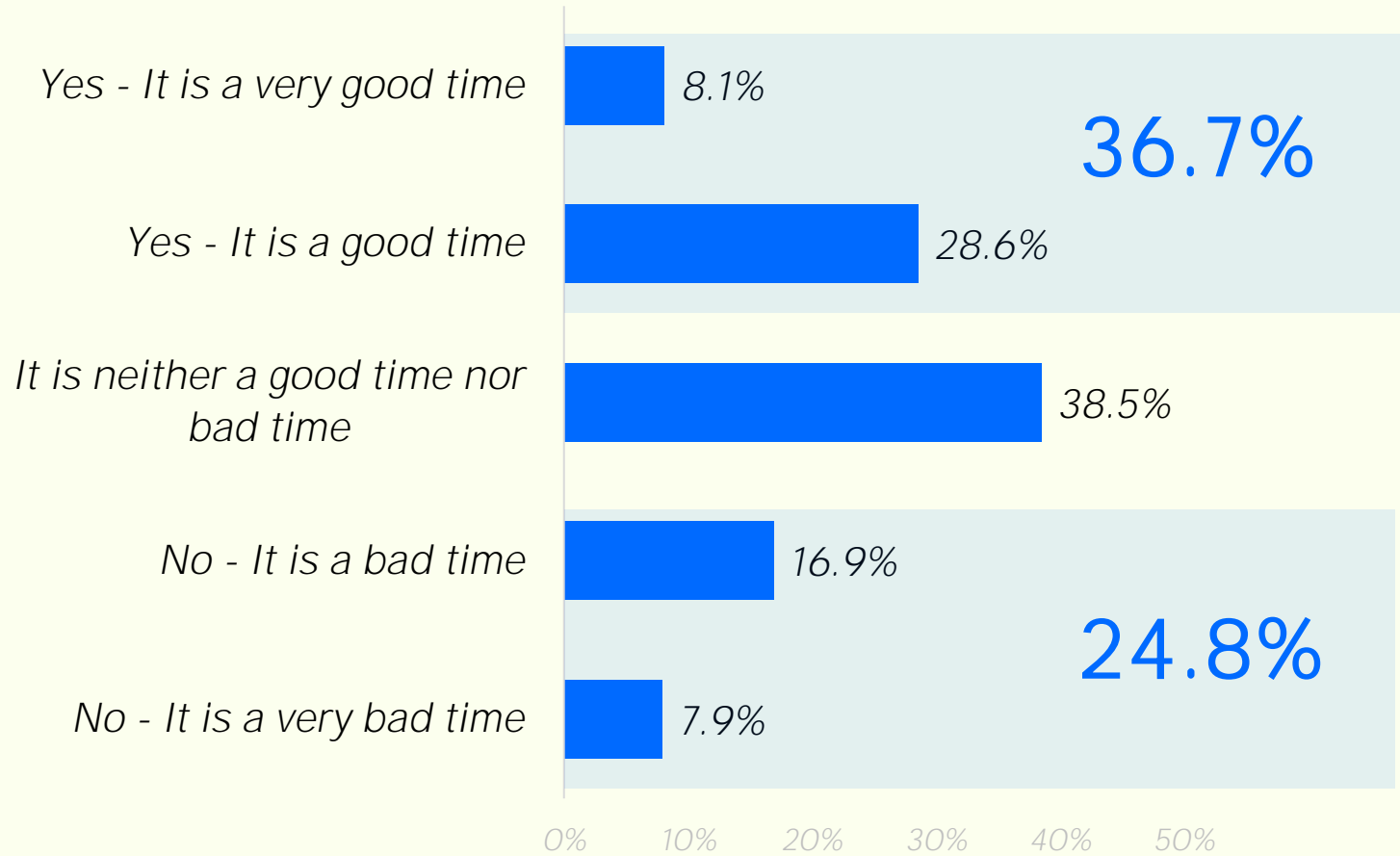


36.7% of American travelers feel that now is a good time to spend on leisure travel

Question:

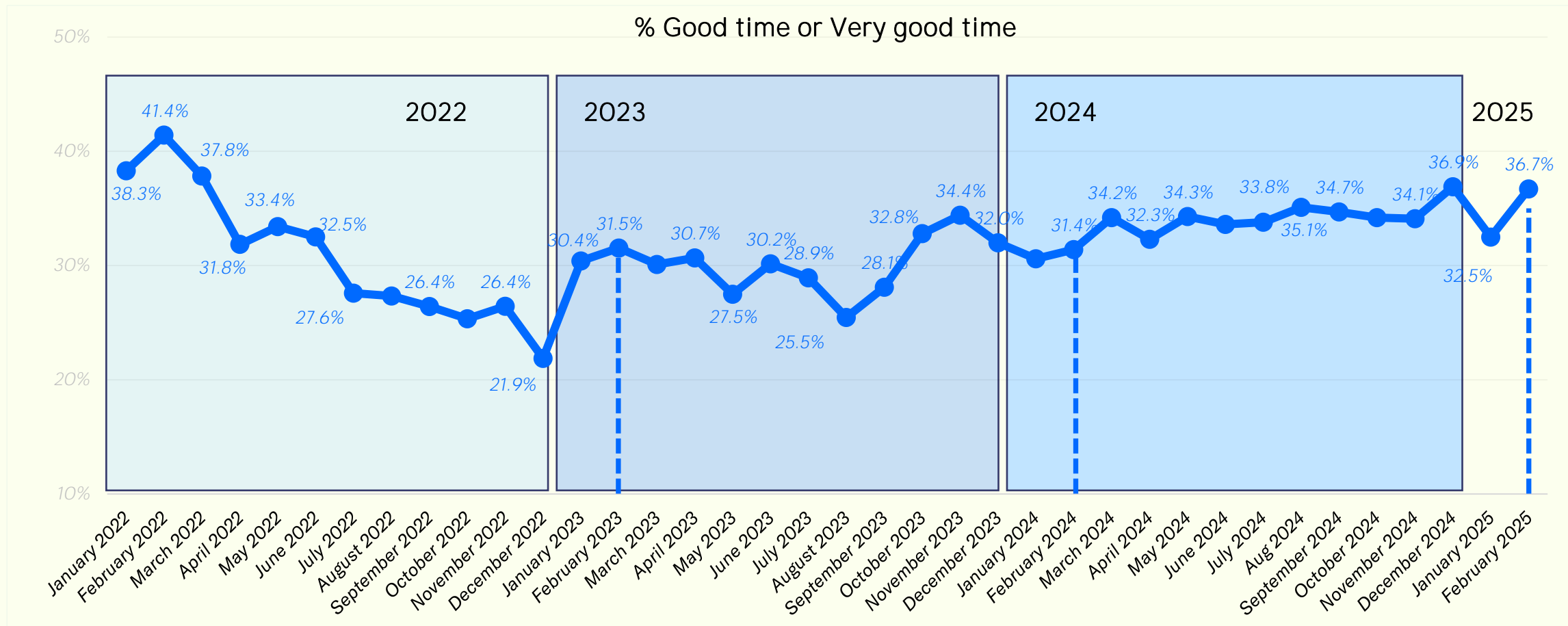
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

Base: All respondents, 4,000 completed surveys



Confidence that now is a good time to spend on leisure travel also improved.

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?

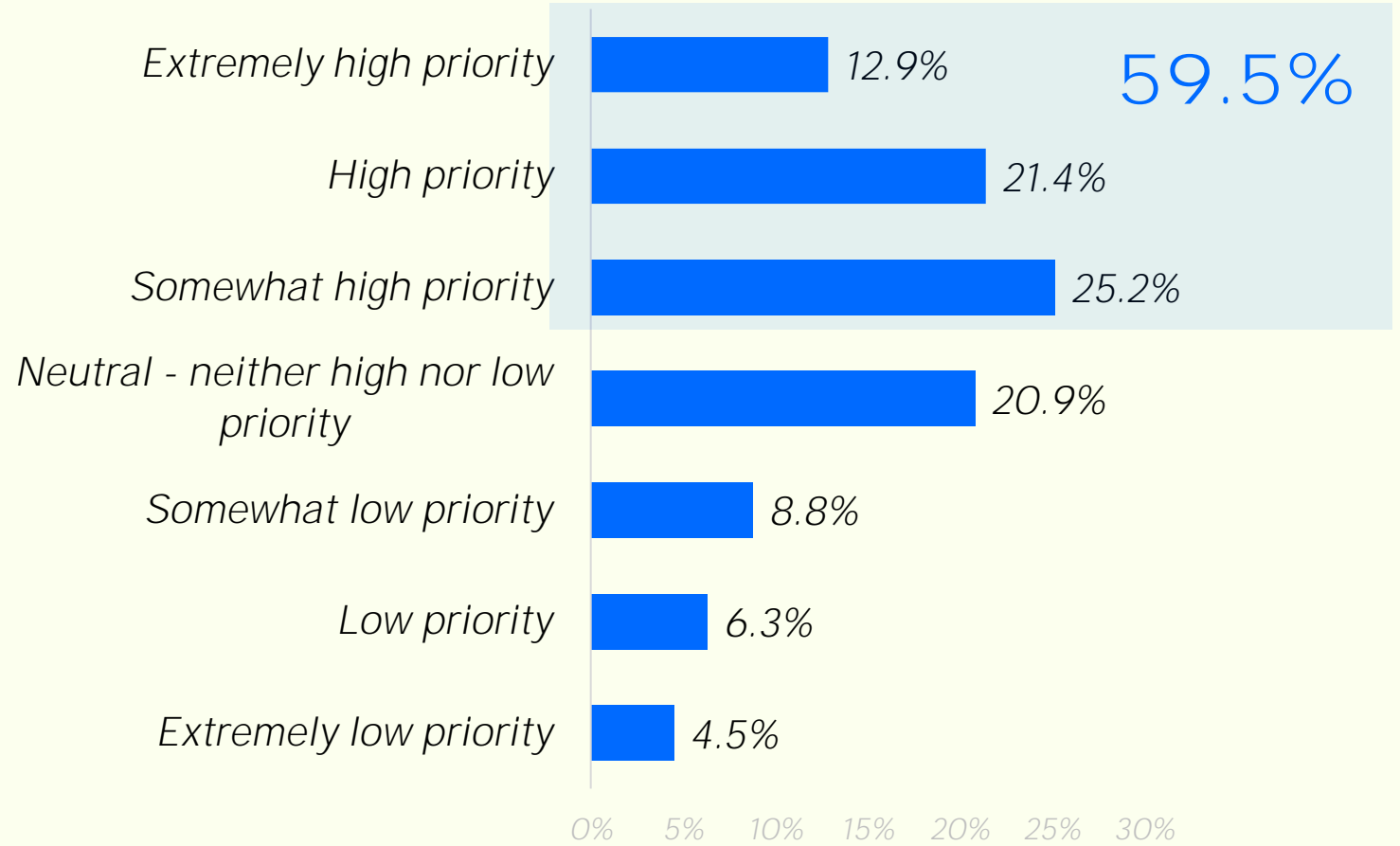


Six-in-ten American travelers report that they will make travel a high budget priority in the near-term

Question:

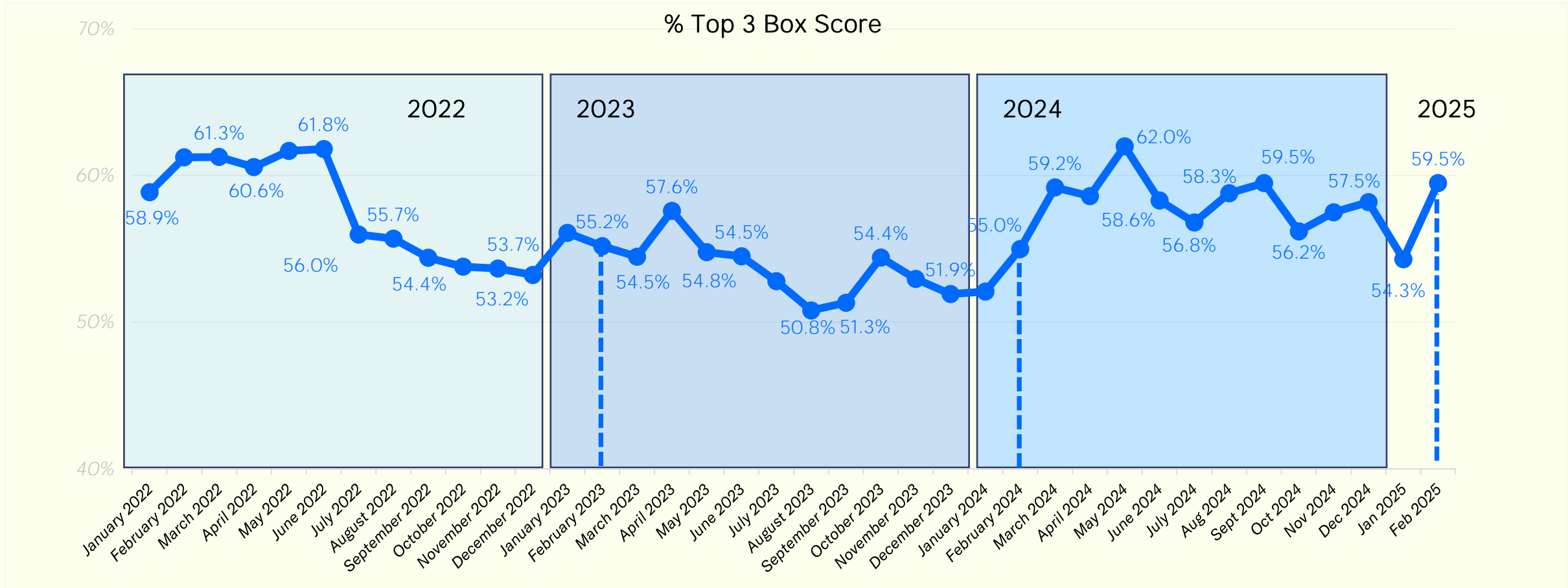
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.



An increasing number of travelers report that they will make travel a budget priority in the near-term

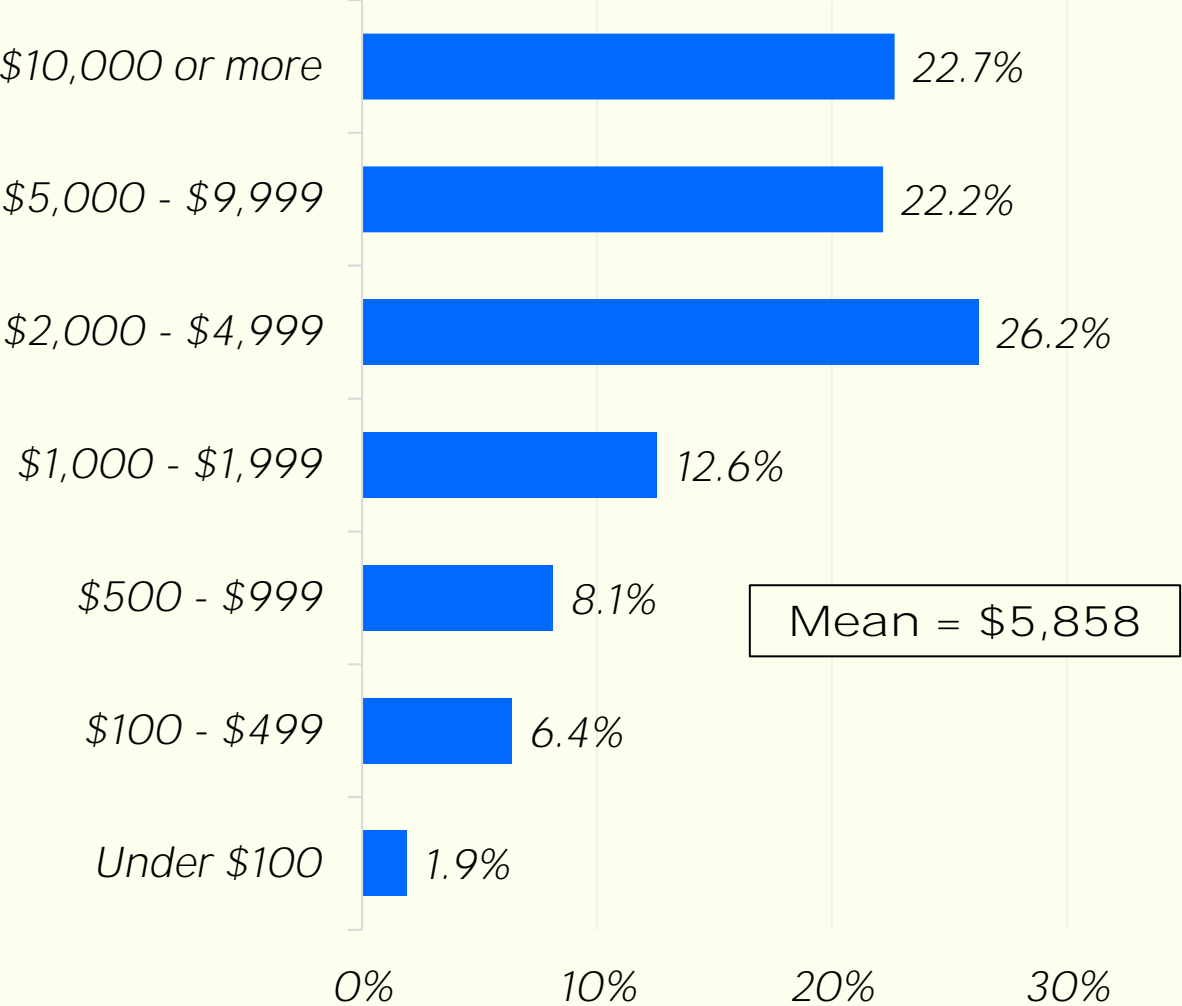
Question: *Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.*



Expected annual travel budgets reached \$5,858

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?

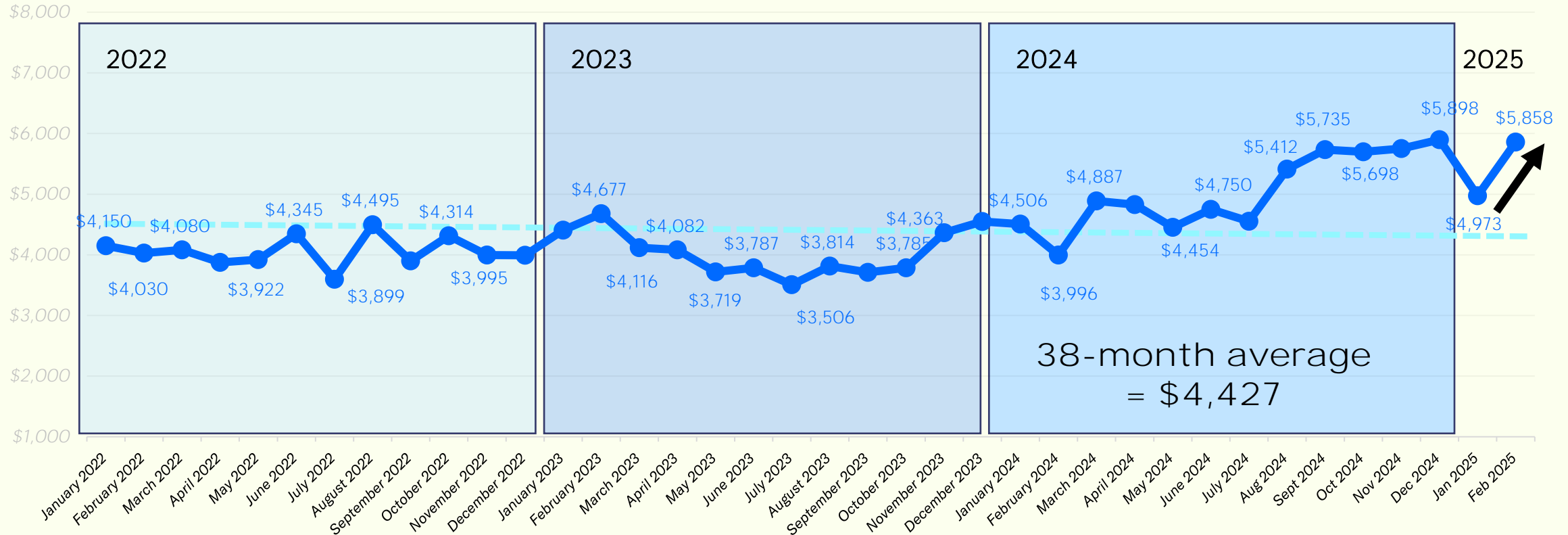
Base: All respondents, 4,000 completed surveys



Expected travel budgets recouped last month's decrease

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):

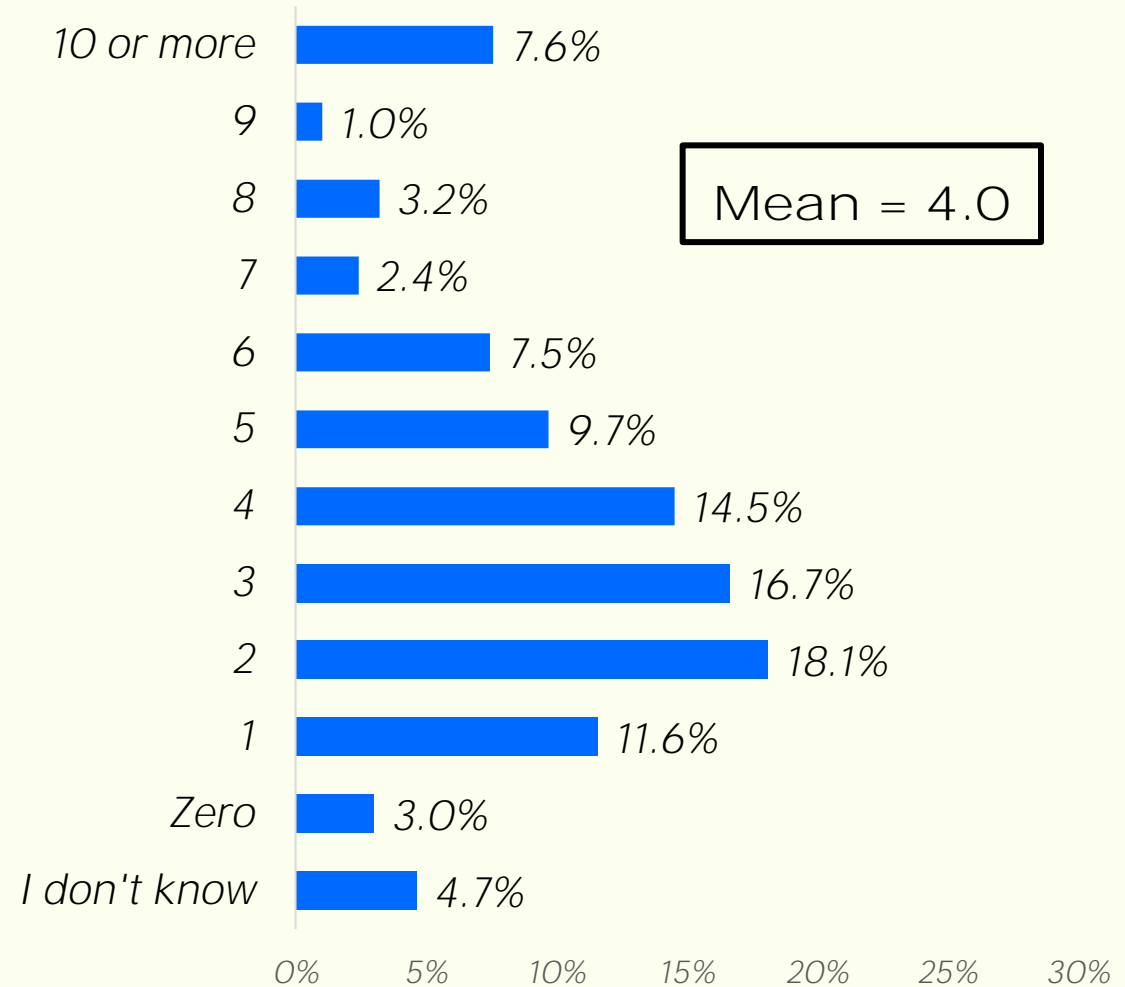
Maximum Expected Annual Travel Spending (Mean)



U.S. Travelers have an average 4.0 leisure trips planned for the next year

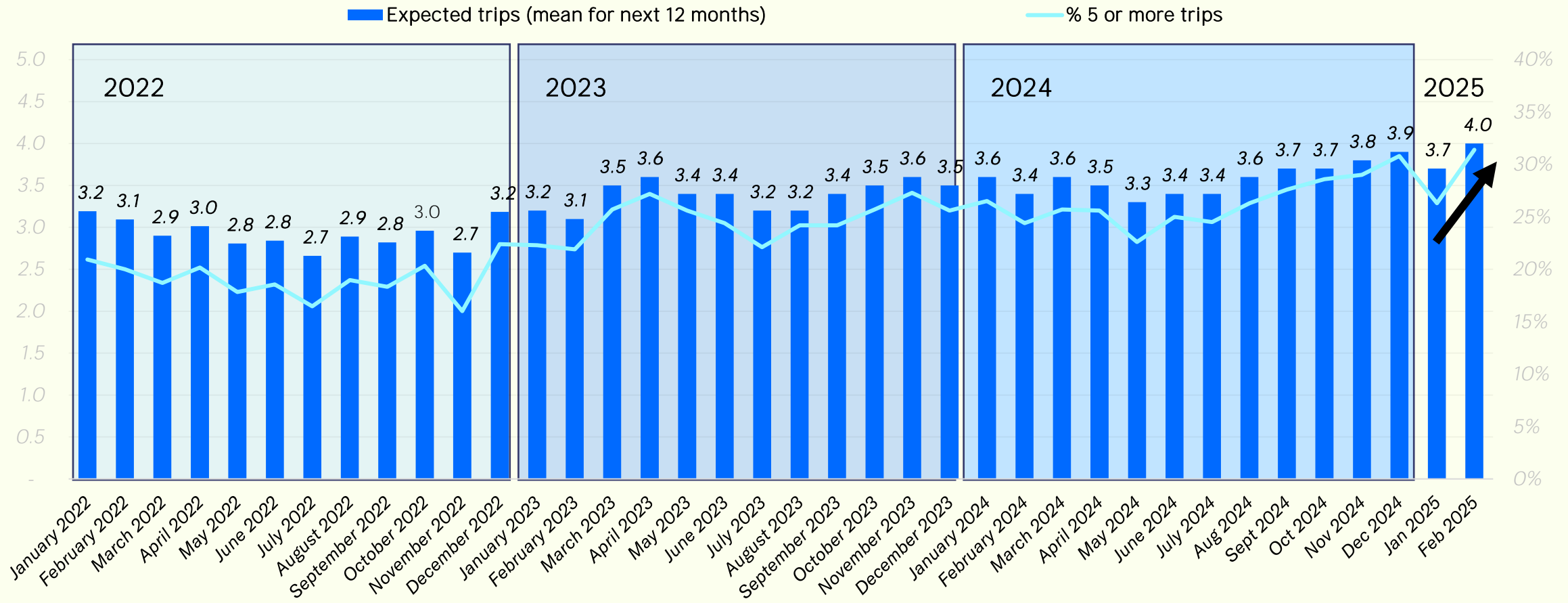
Question:
*IN TOTAL, how many leisure trips
(of 50 miles or more from your
home) do you expect to take
in NEXT TWELVE (12) MONTHS?*

Base: All respondents, 4,000 completed surveys



The average number of expected leisure trips is at a 5-year high

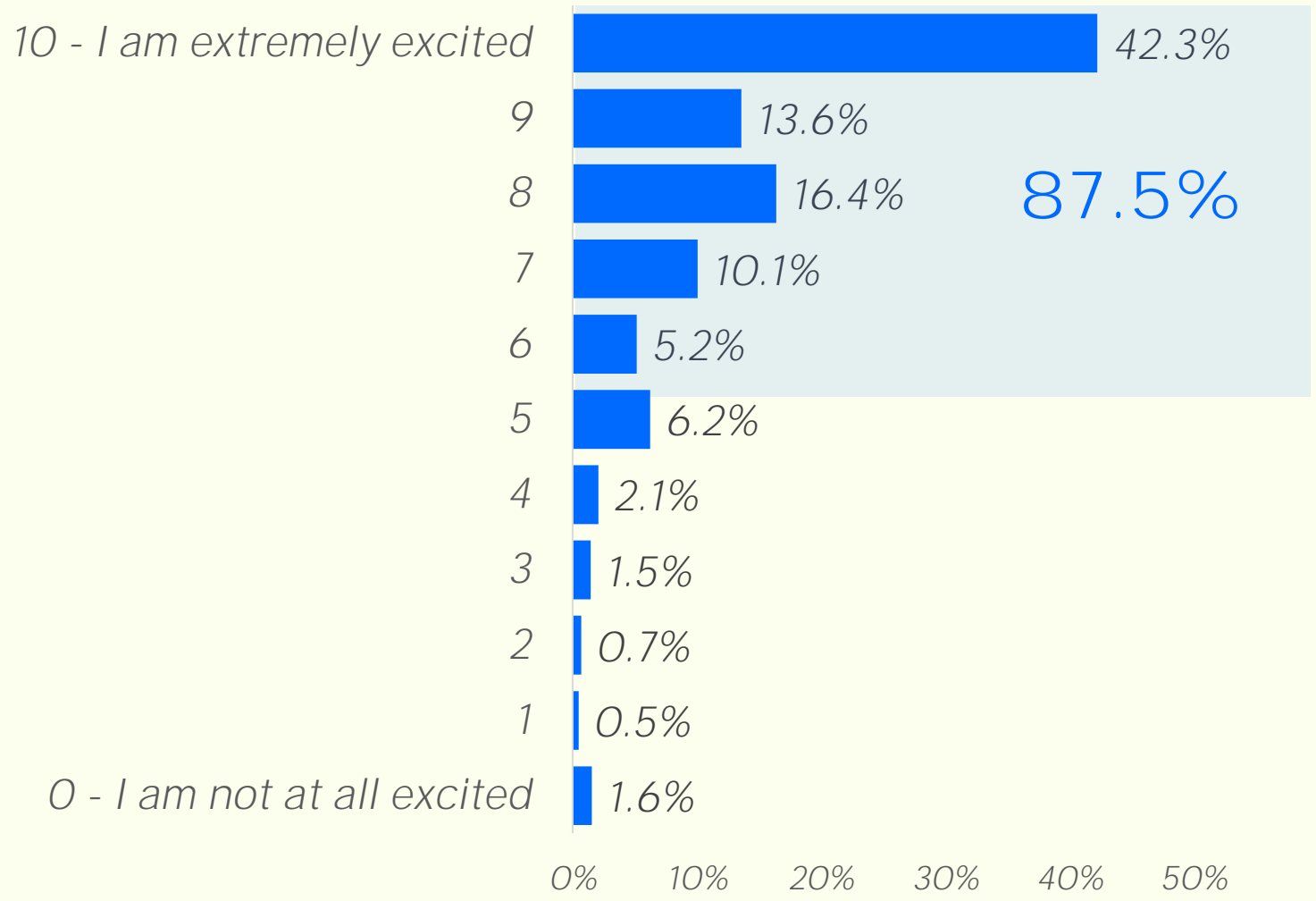
Question: *IN TOTAL*, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



Nearly 90% of American travelers register high excitement levels for travel

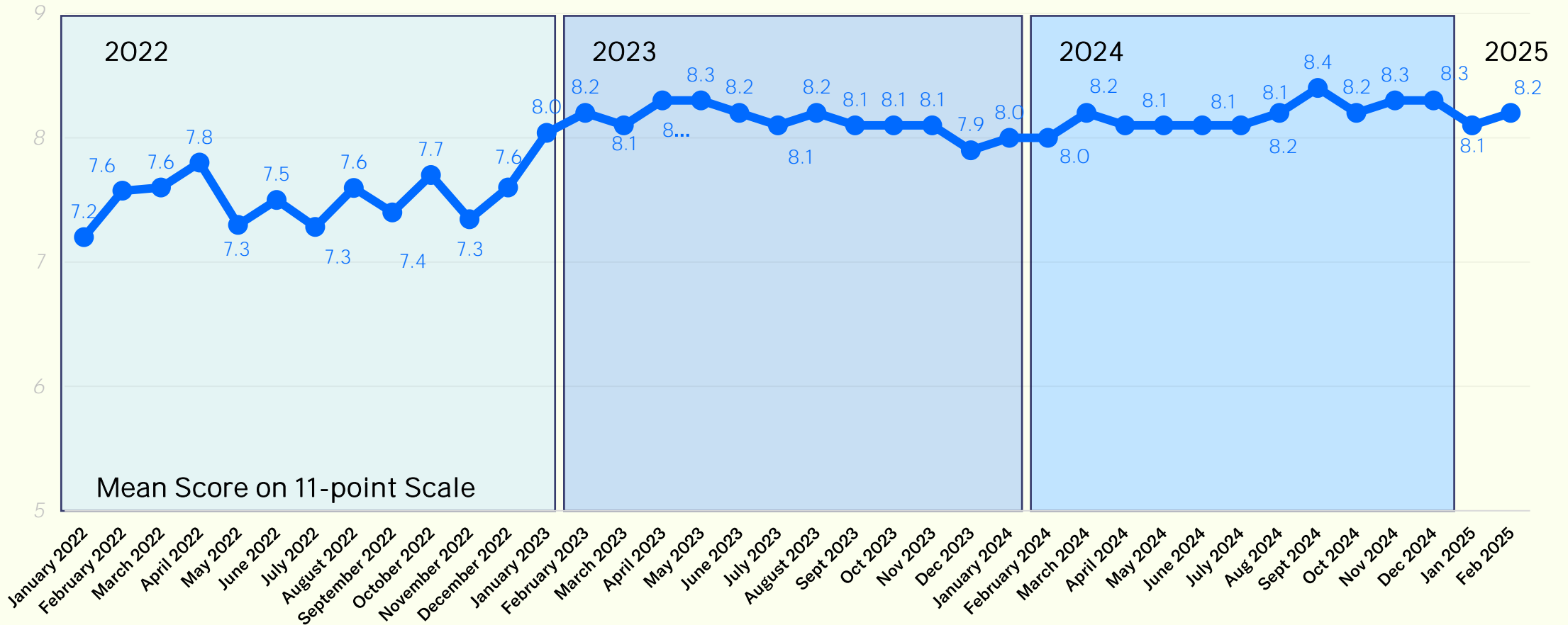
Question:
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

Base: All respondents, 4,000 completed surveys



Excitement for travel remains at consistently high levels

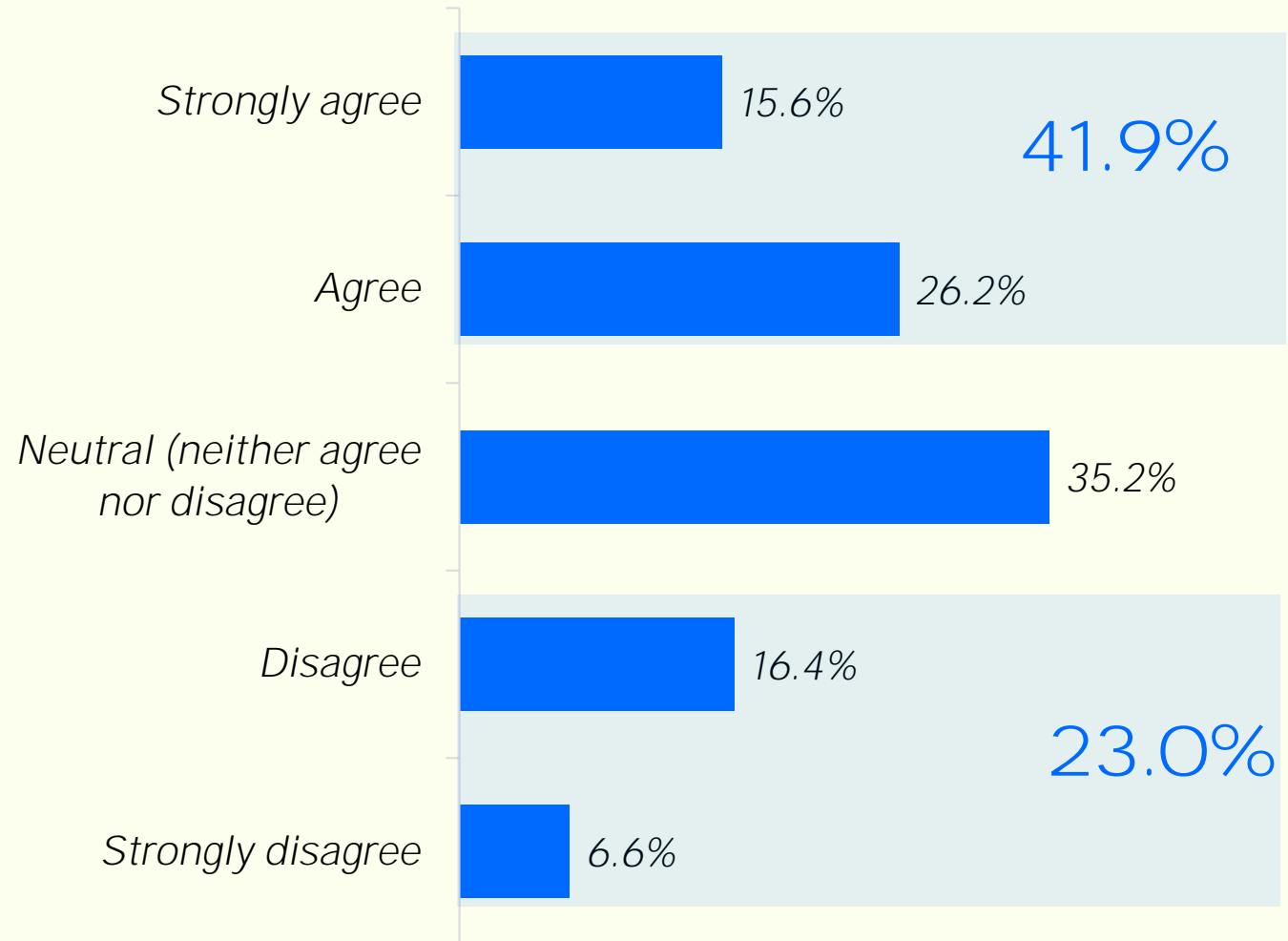
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



More than 40% of American travelers anticipate a recession

Question:

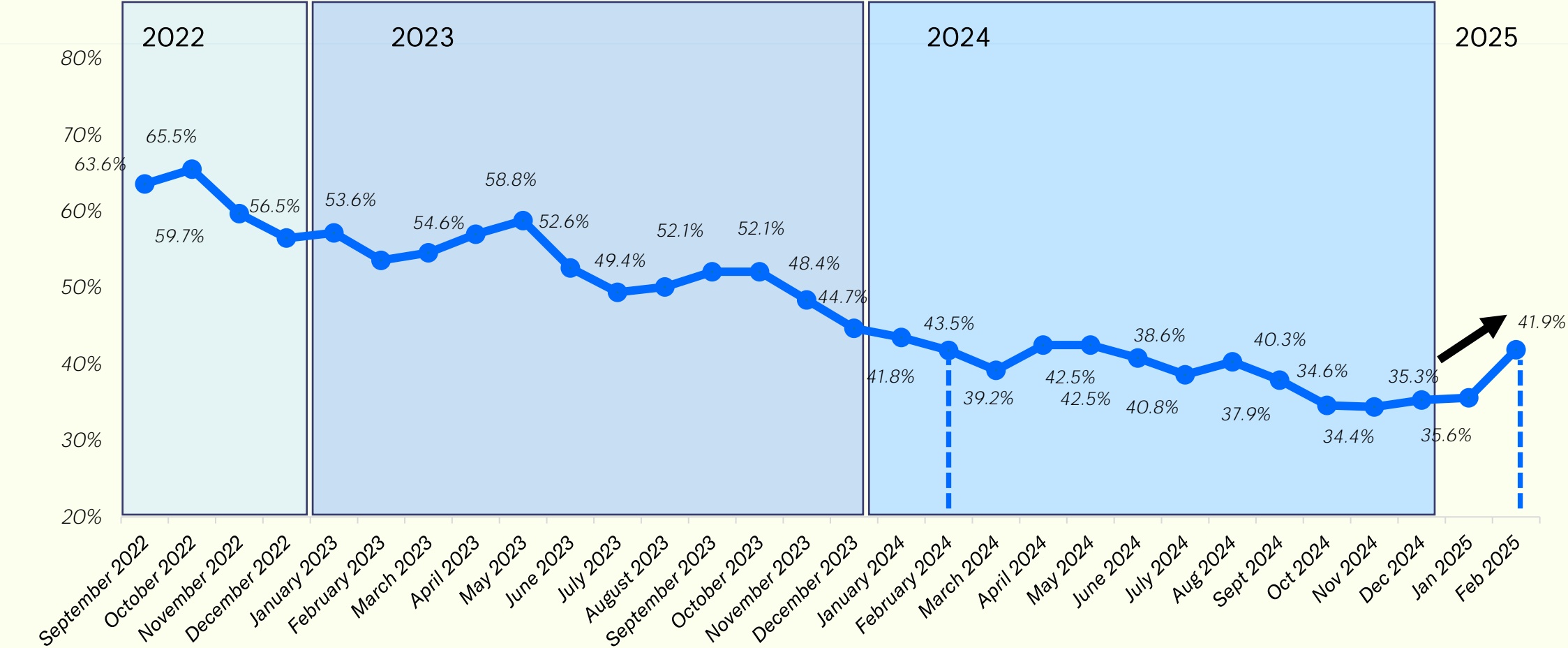
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Recession fears are growing

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

% Agree or Strongly agree

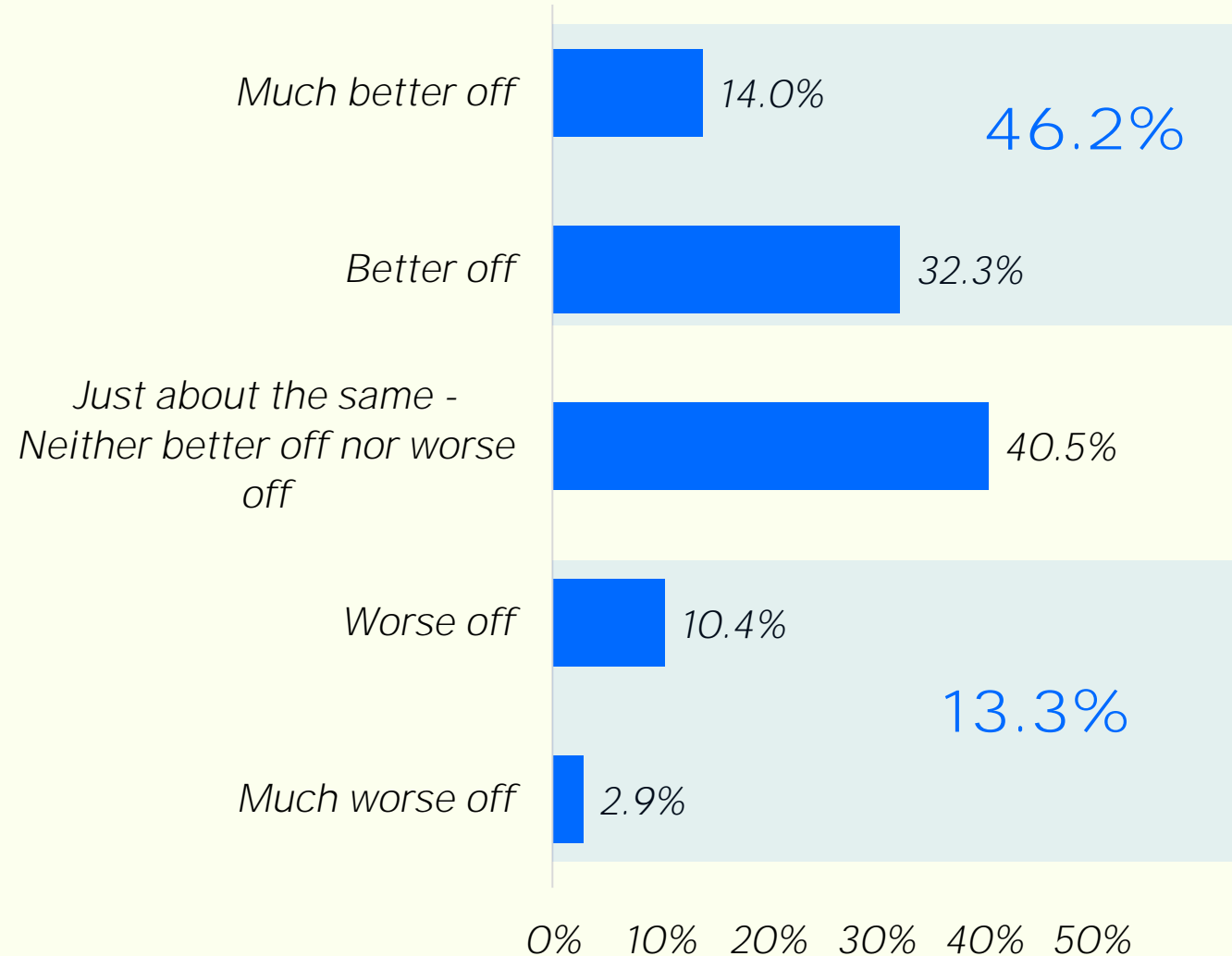


Over 46% of American travelers feel they will be better off next year compared to this year

Question:

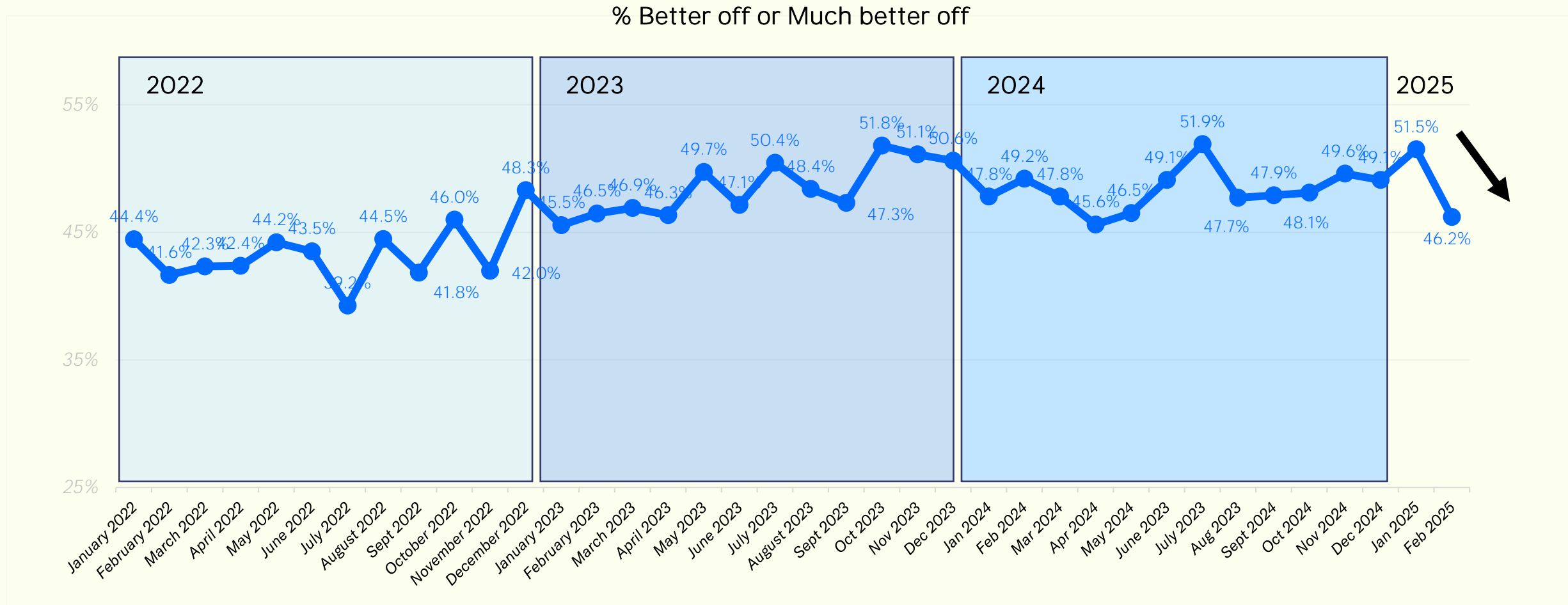
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

Base: All respondents, 4,000 completed surveys



However, travelers confidence about their financial future dropped sharply.

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?



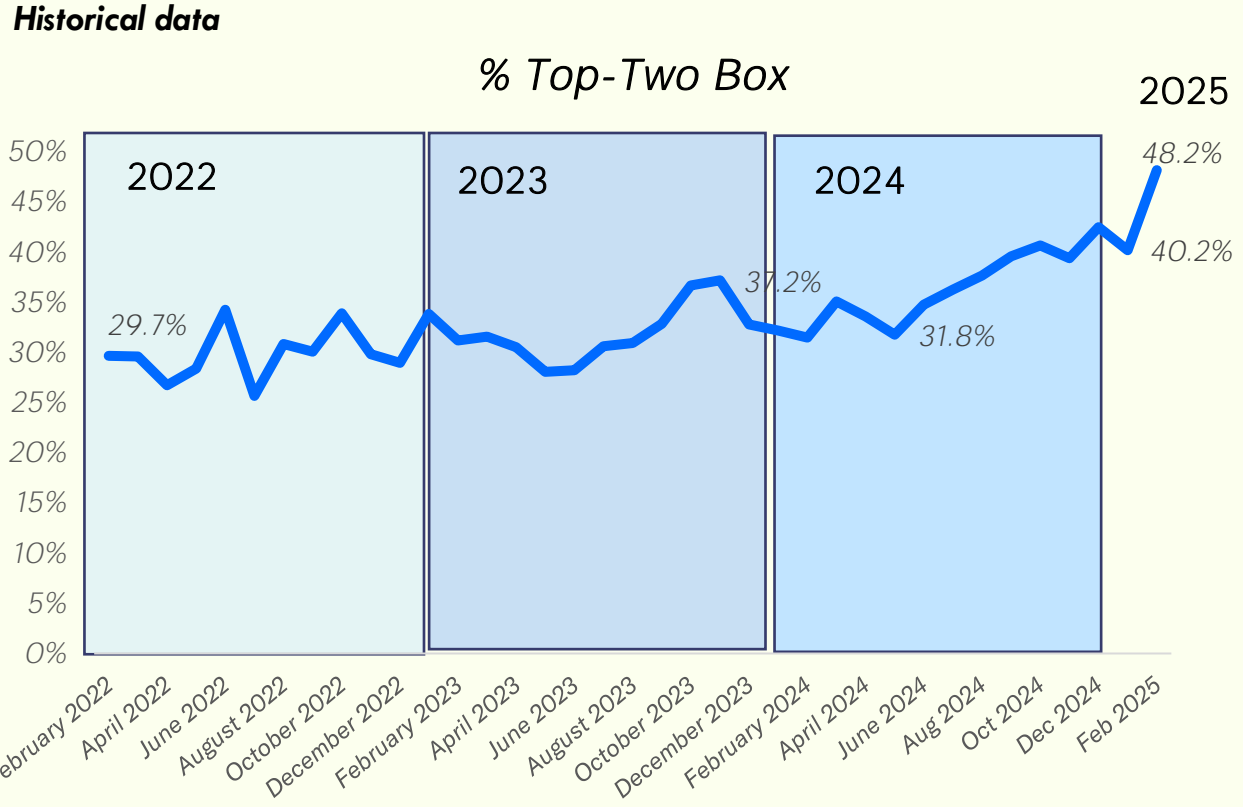
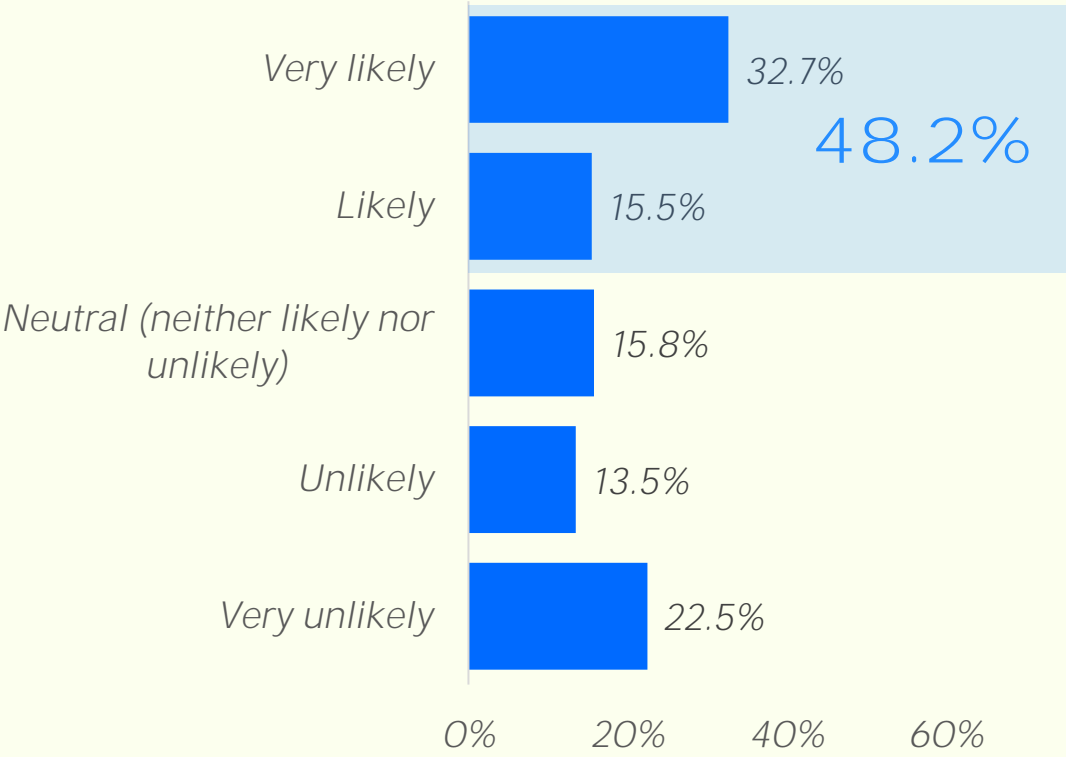
International Travel Sentiment

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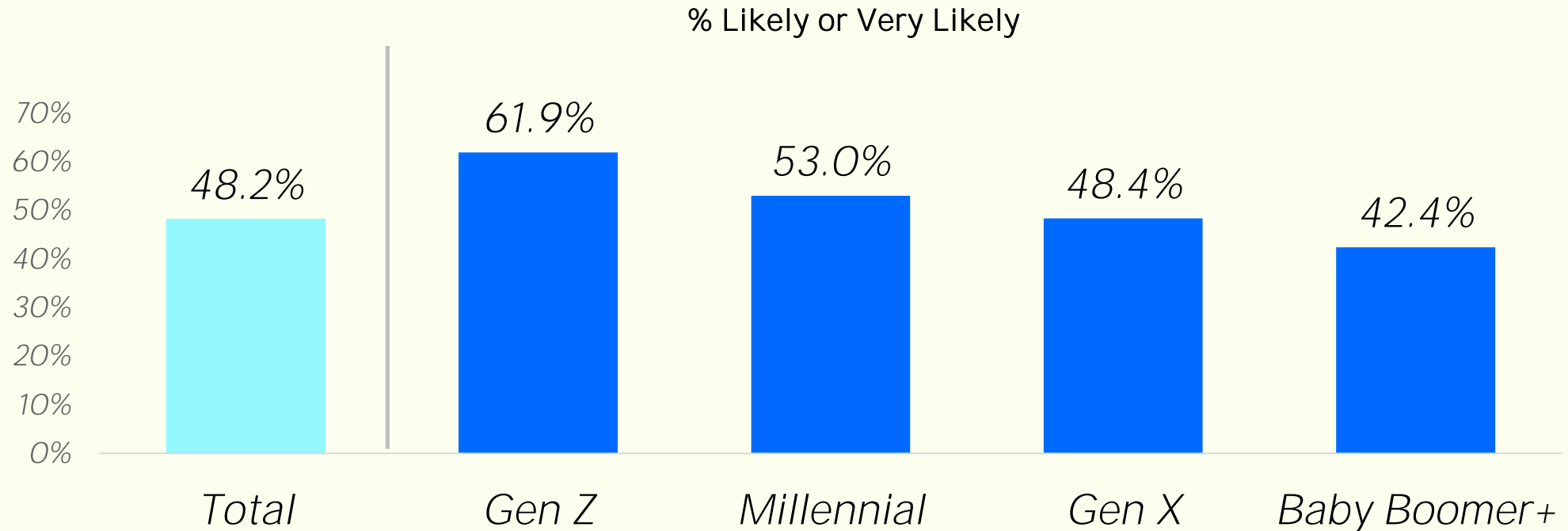
American travelers international trip intentions reach a record-high

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



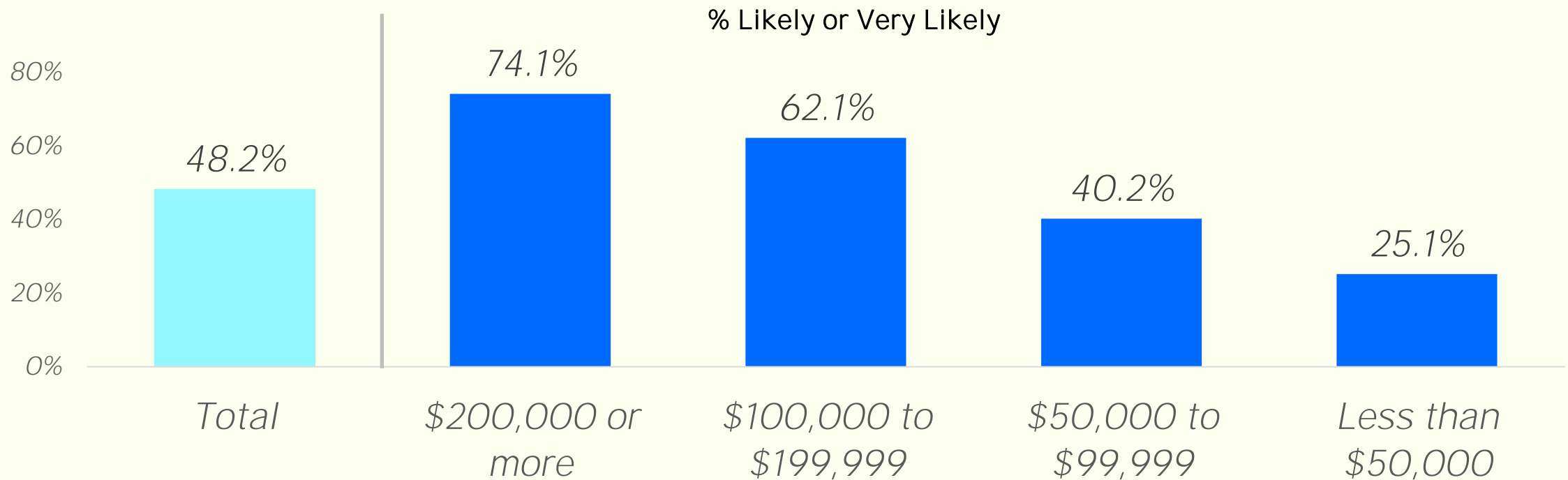
Likelihood to Travel Abroad in the Next 12 Months by **Generation**

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



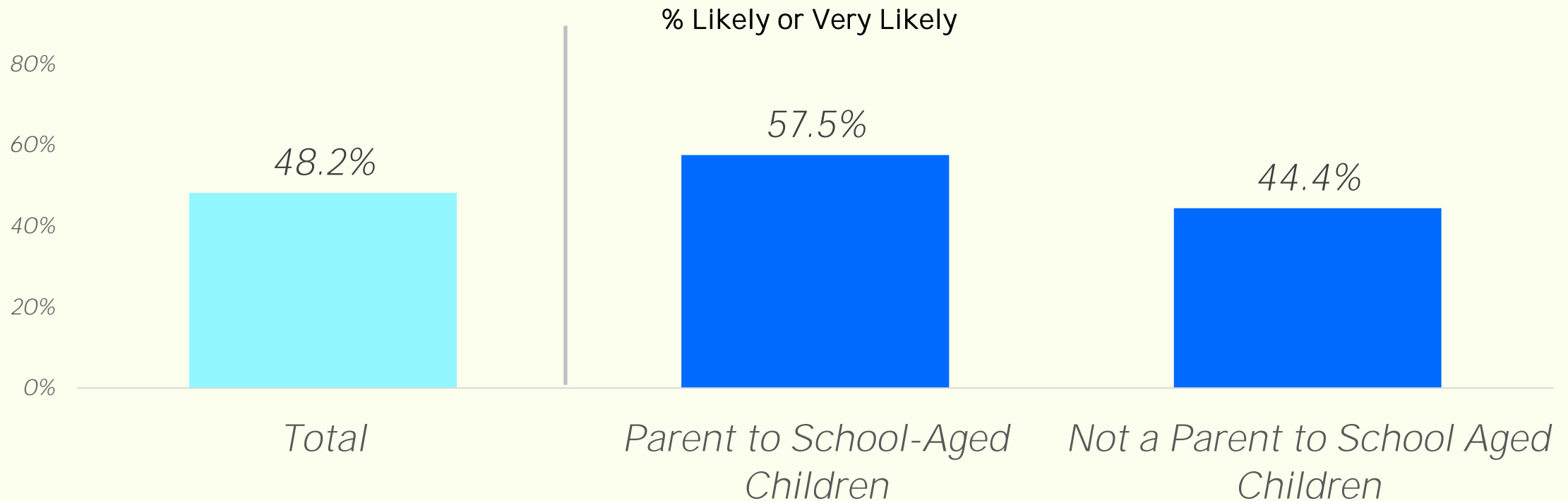
Likelihood to Travel Abroad in the Next 12 Months by **Income**

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



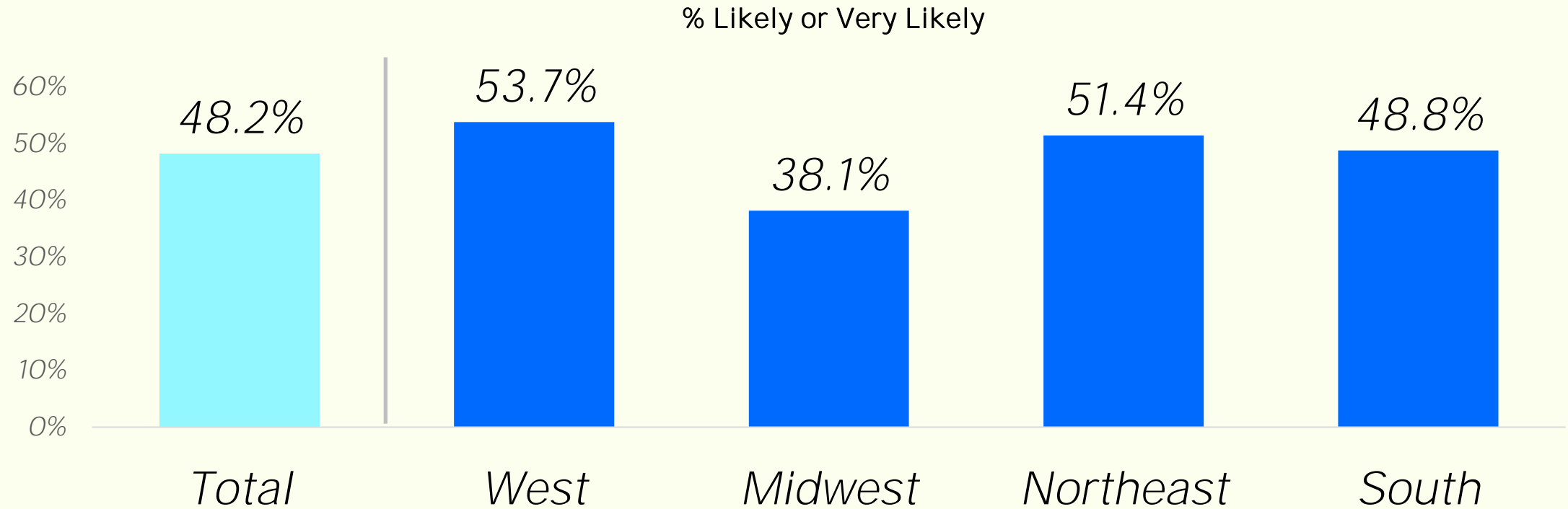
Likelihood to Travel Abroad in the Next 12 Months by Family Status

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



Likelihood to Travel Abroad in the Next 12 Months by Region

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



The Summer Travel Outlook



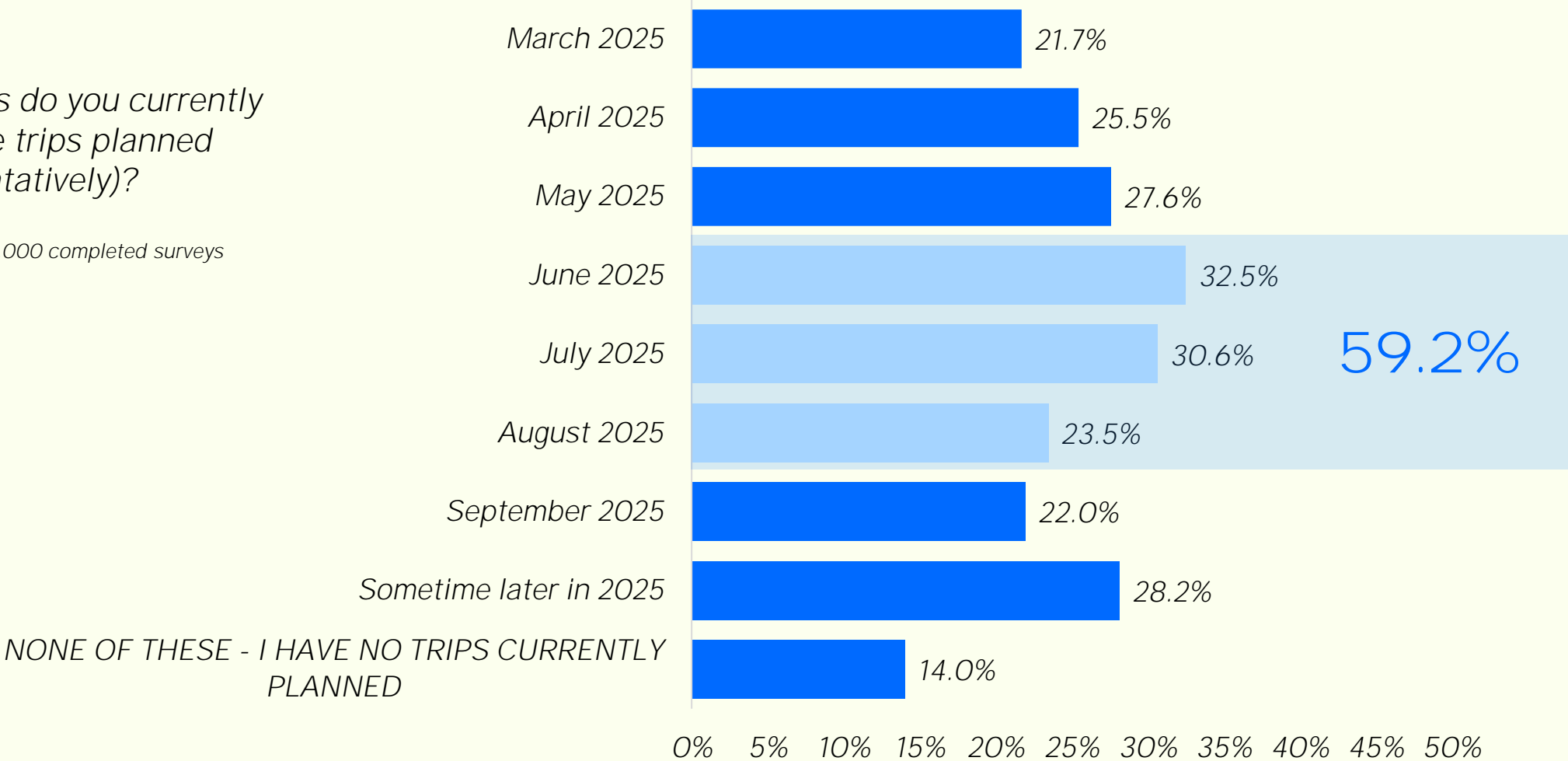
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59.2% of American travelers already have trips conceptualized for this summer

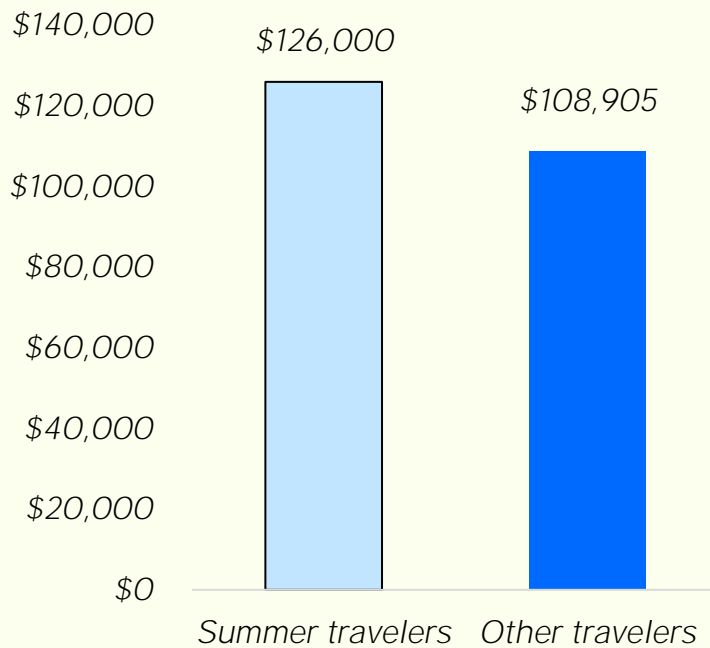
Question:
In which months do you currently have any leisure trips planned (even if only tentatively)?

Base: All respondents, 4,000 completed surveys

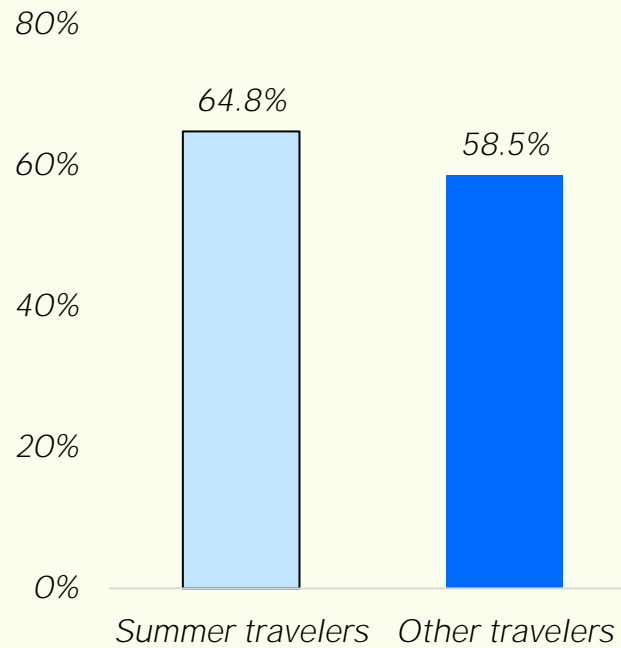


Demographically, summer travelers are nearly identical to other travelers, except in income, employment and parental status

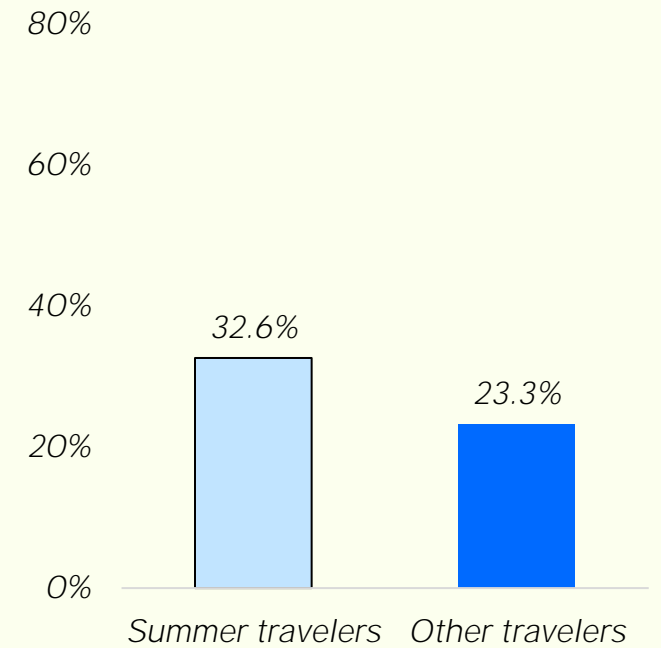
Annual Household Income



Employed (Full-time)

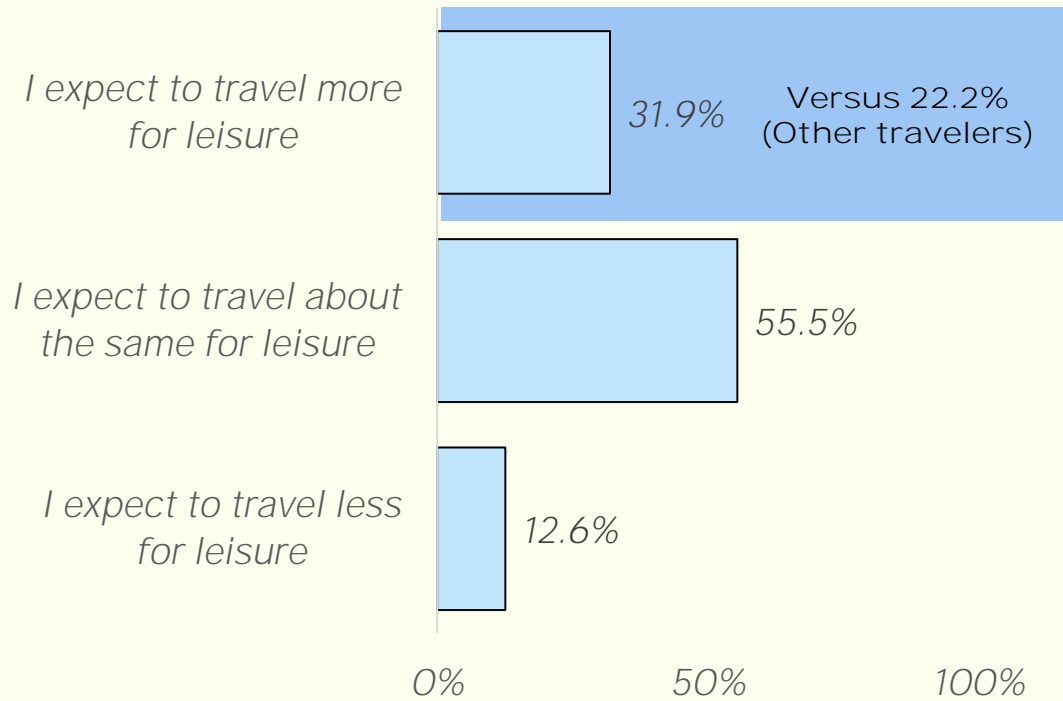


Parent of School-aged Kids

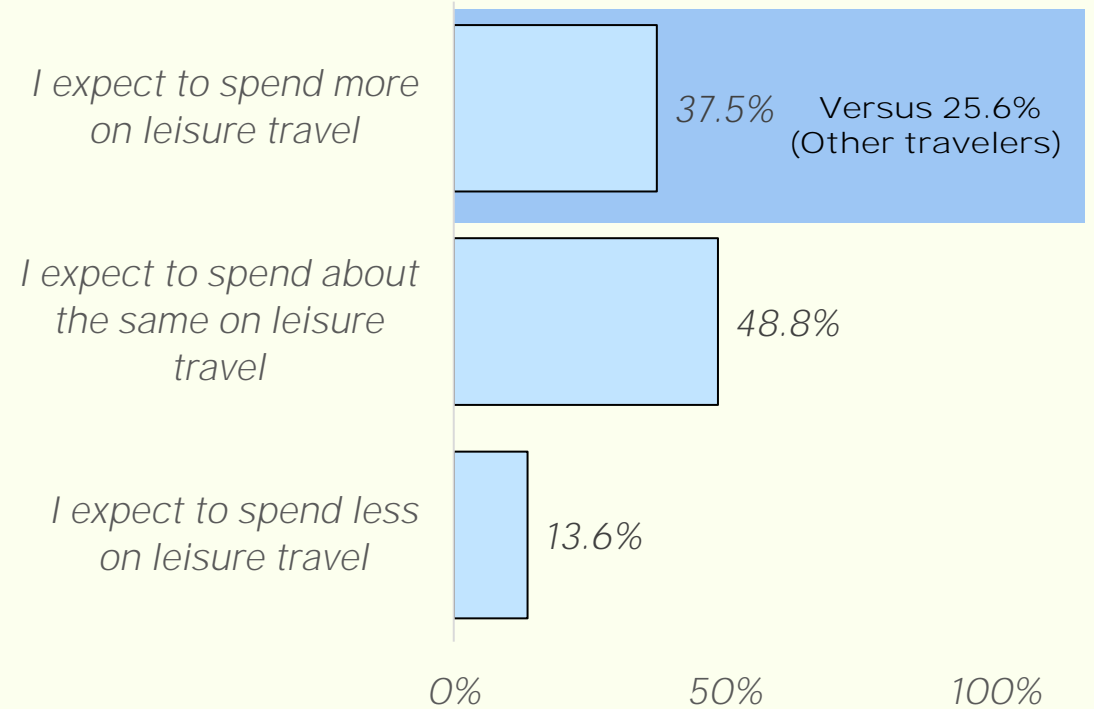


Summer travelers are optimistic about their travel volume and spending

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?*

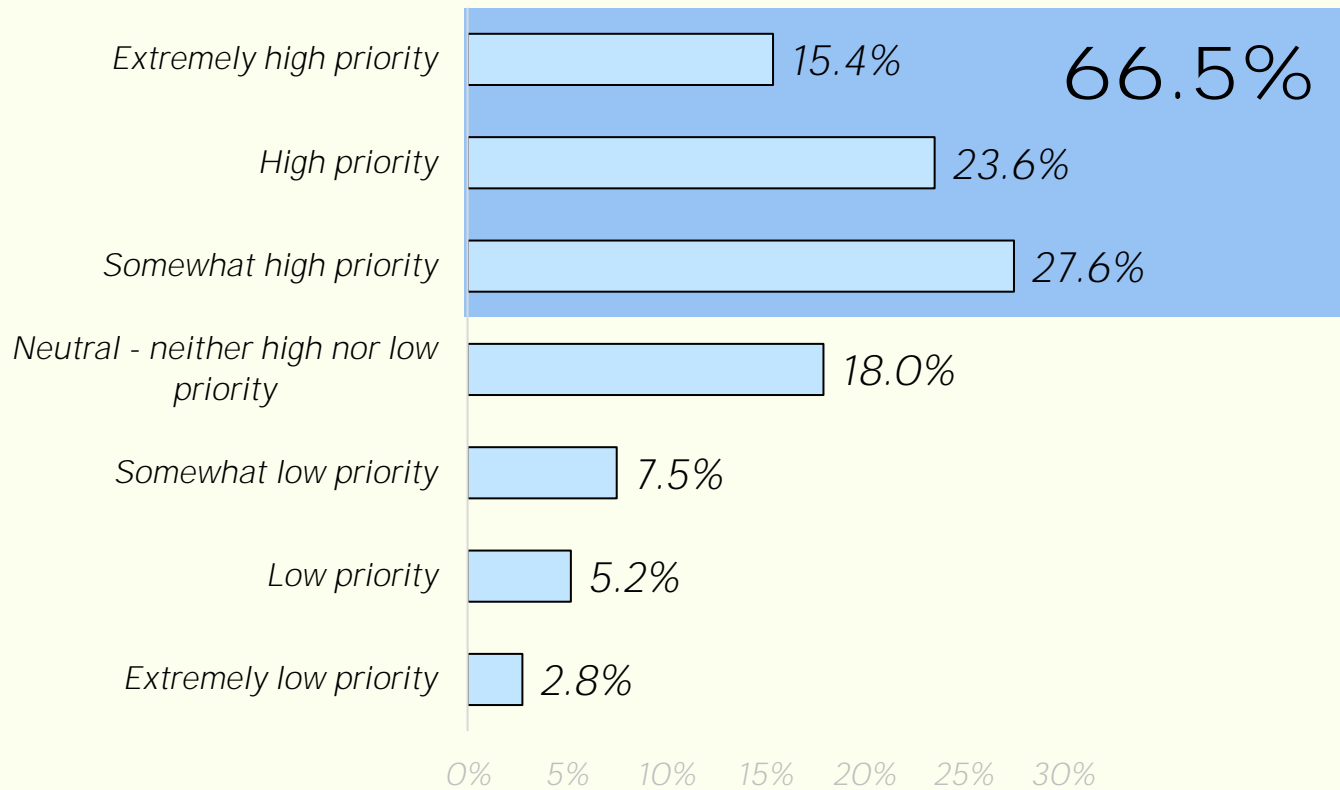


Question: *In the NEXT 12 MONTHS, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?*



2-out-of-3 summer travelers consider leisure travel a high-priority budget item

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) _____.*

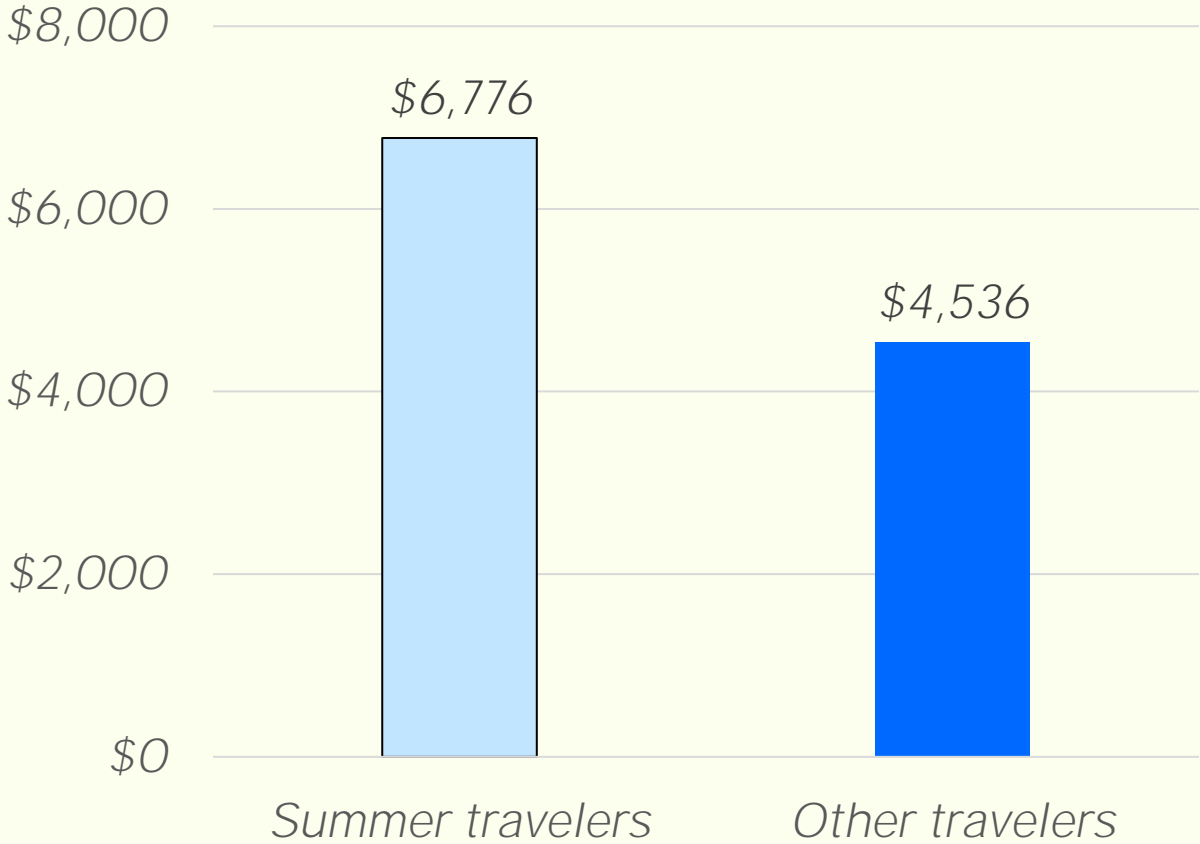


Only 49.3% of other travelers say leisure travel will be a high priority.

Summer travelers have large annual travel budgets

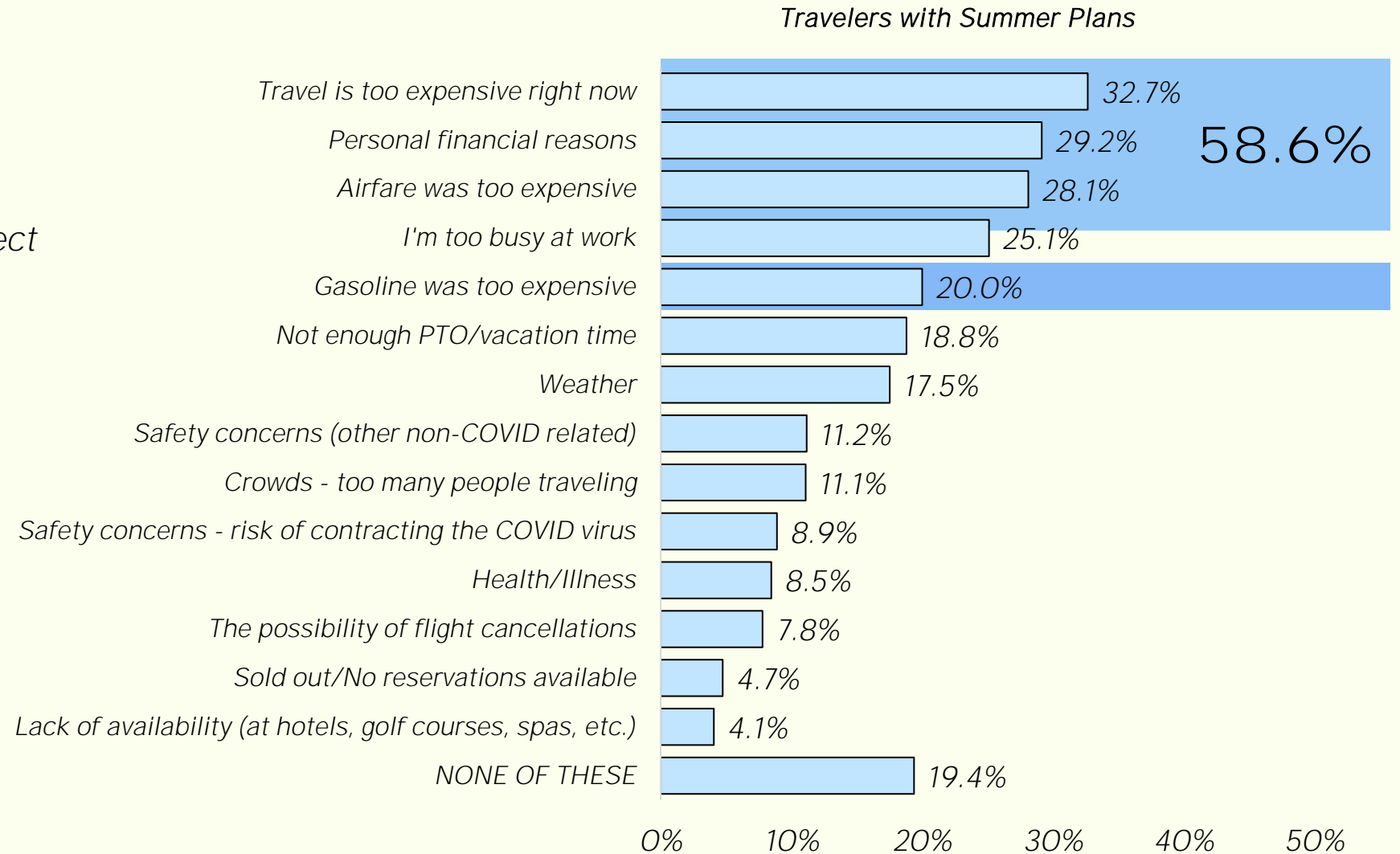
Question: *How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?*

Base: All respondents, 4,000 completed surveys



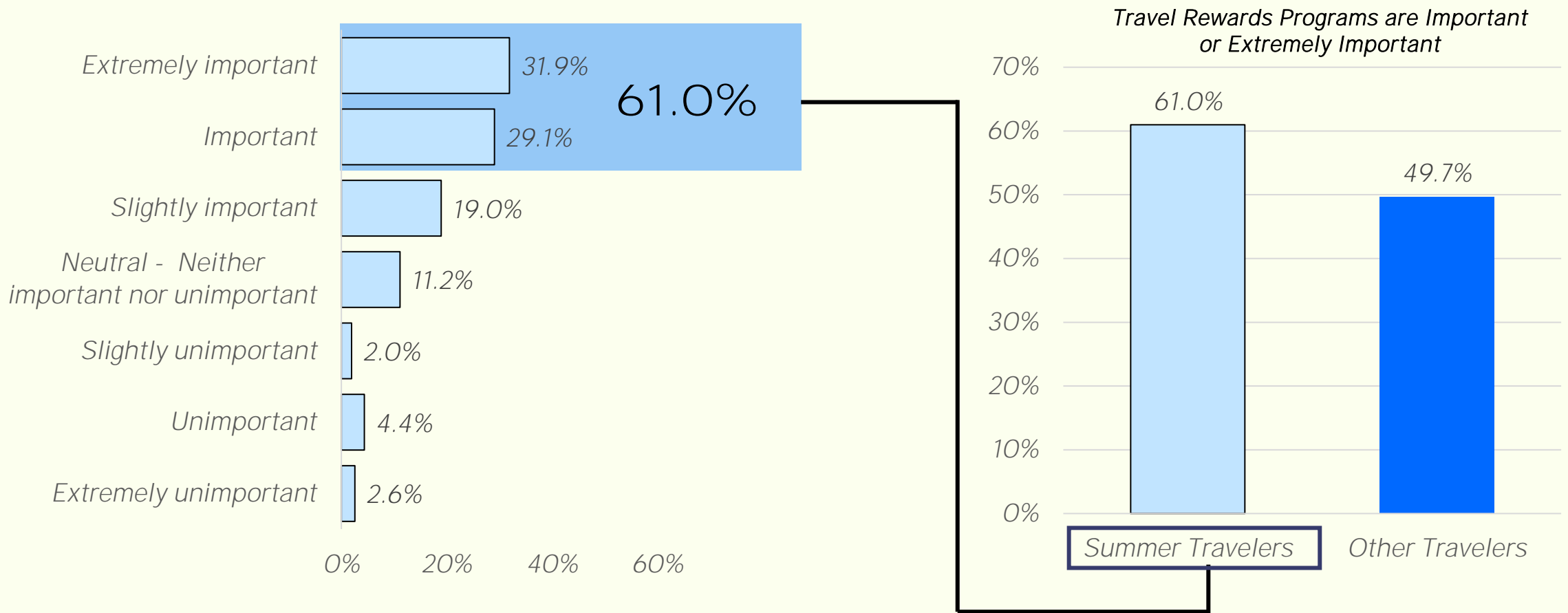
Financial concerns are likely to be the primary impediment to travel this summer

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)*



Summer travelers are rewards people

Question: *How important are travel rewards programs (hotels, airlines, etc.) to how you generally plan your leisure travels?*



Question: How much of a priority will each of the following factors be in your travel for SUMMER 2025? (Please rate each one using the scale below)

Top Priority

High Priority

Moderate Priority

Low Priority

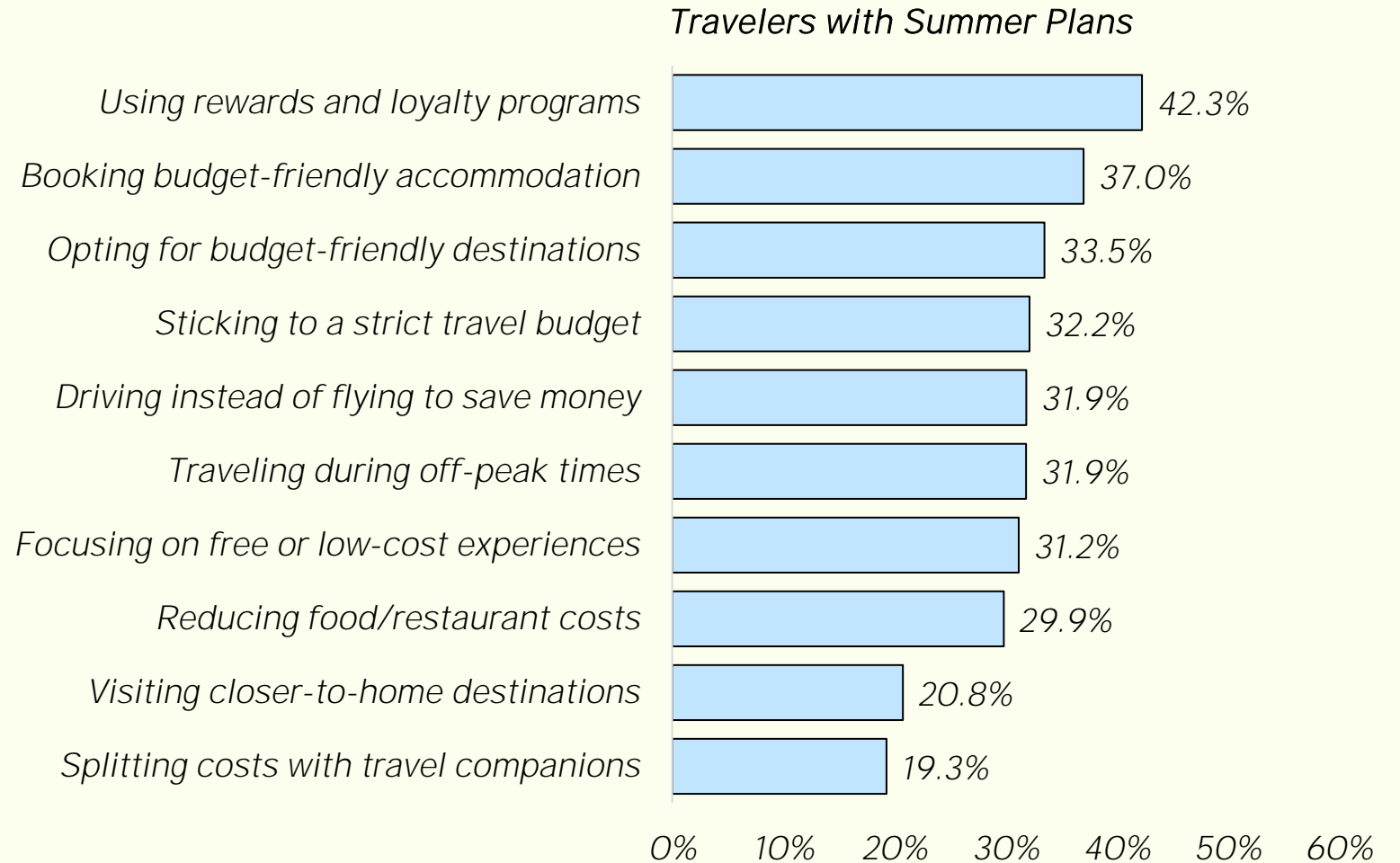
Not a Priority

Top 2-Box
Score



Summer travelers will be looking to redeem rewards and find budget-friendly hotels and destinations

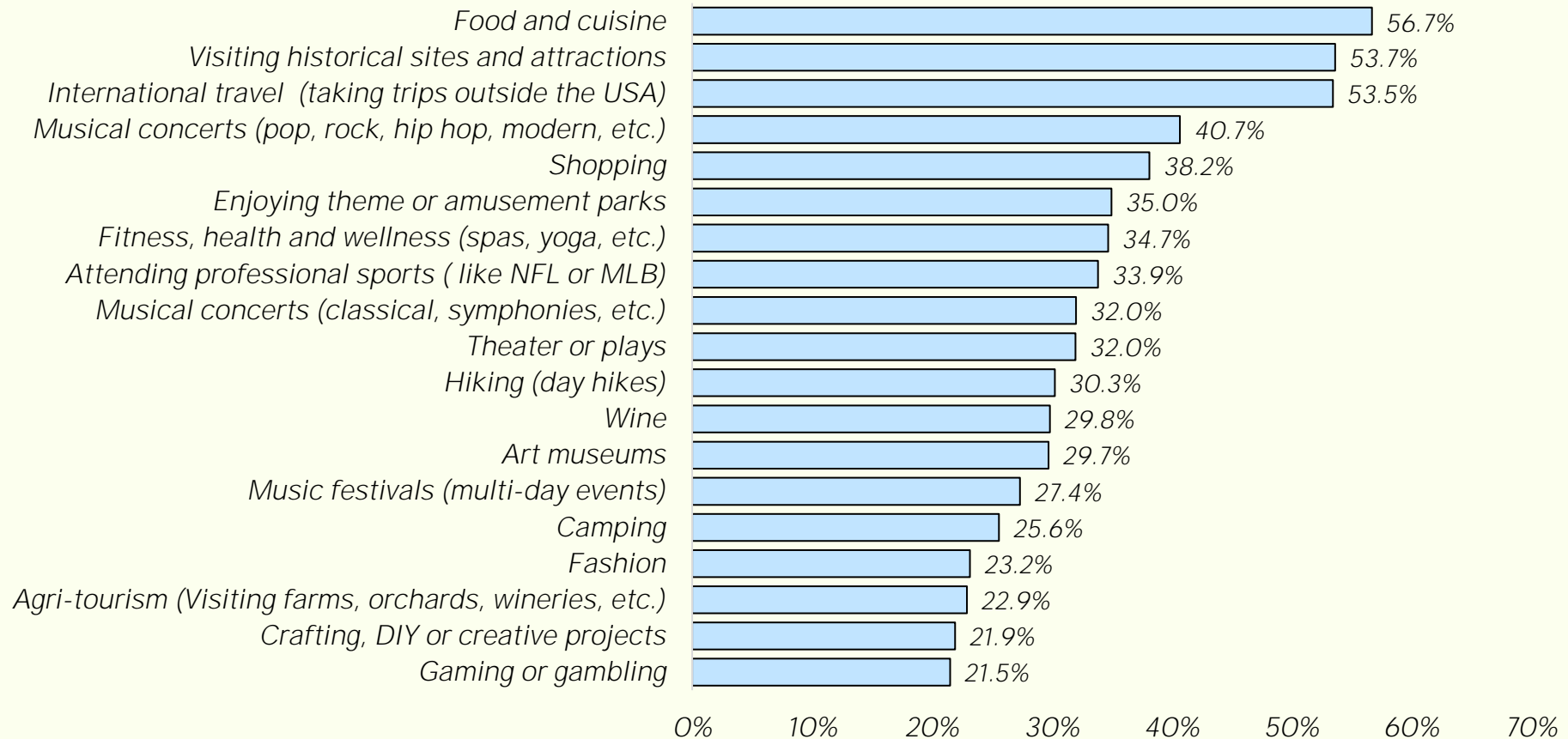
Question: How much of a priority will each of the following factors be in your travel for SUMMER 2025? (Please rate each one using the scale below)



Food, history and international travel top summer travelers' passions list

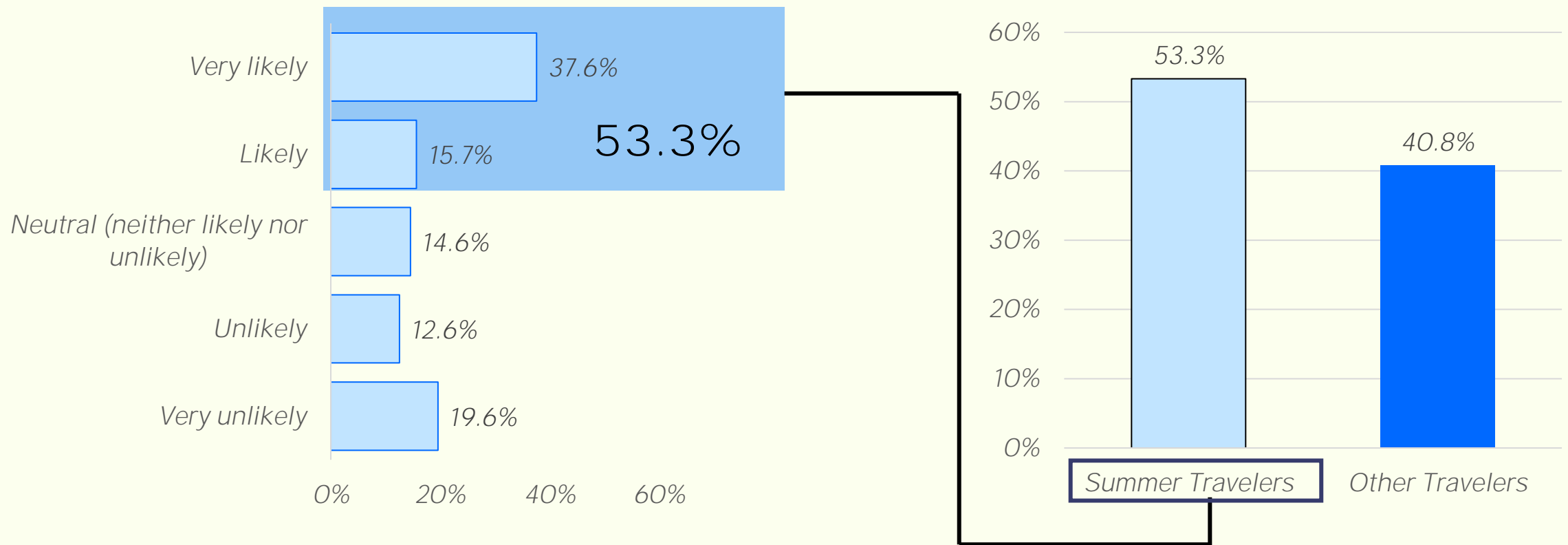
Question: Tell us about your hobbies and passions. Please use the scale below to describe your interest in each.

Top 2-Box Score: "Extremely high interest - I'm passionate about this" or "High interest"



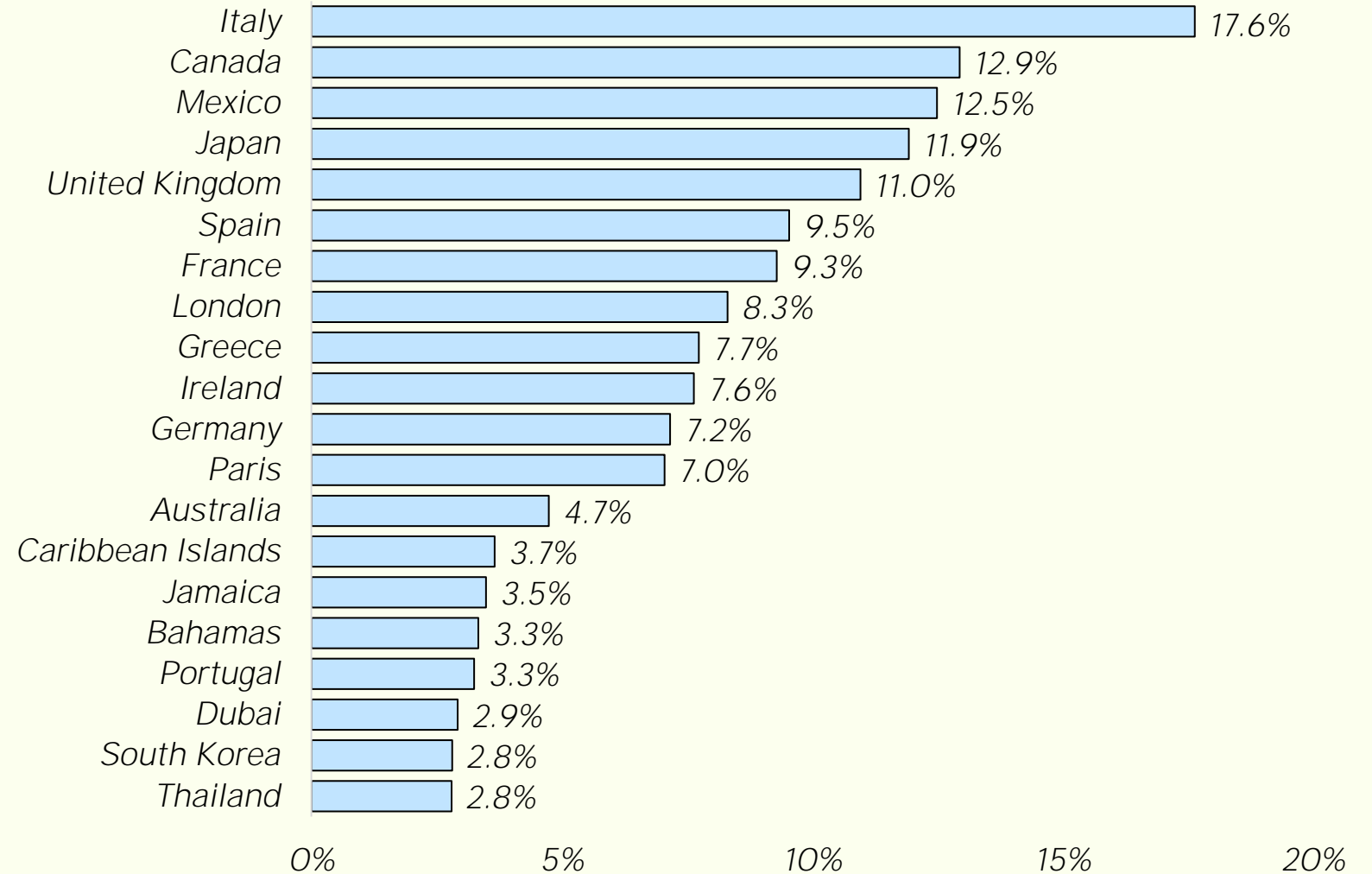
Summer travelers are likely to looking abroad for their travel experiences

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



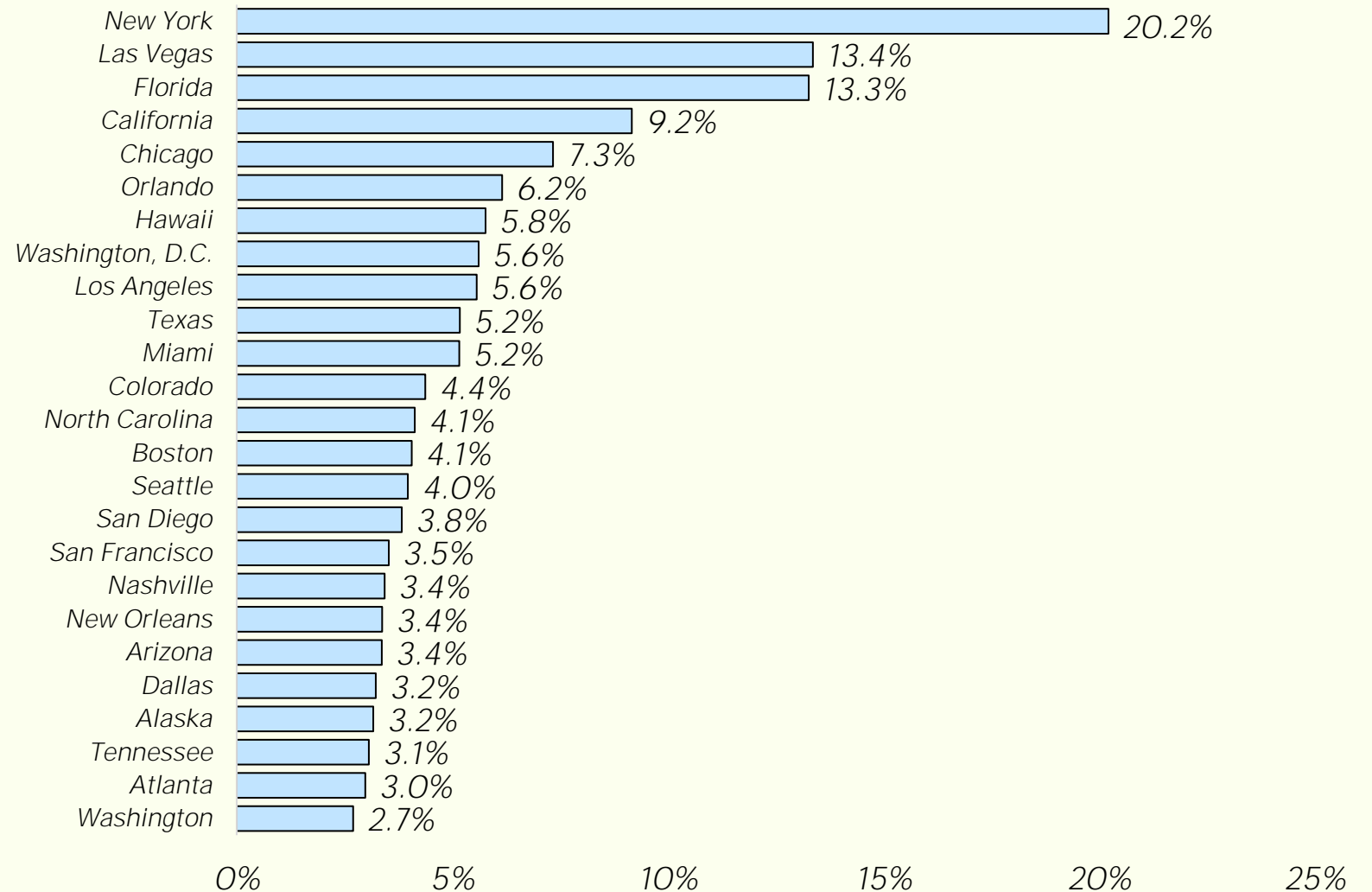
Summer travelers international destination hotlist is topped by Italy, Canada, Mexico and Japan

Question: Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS?



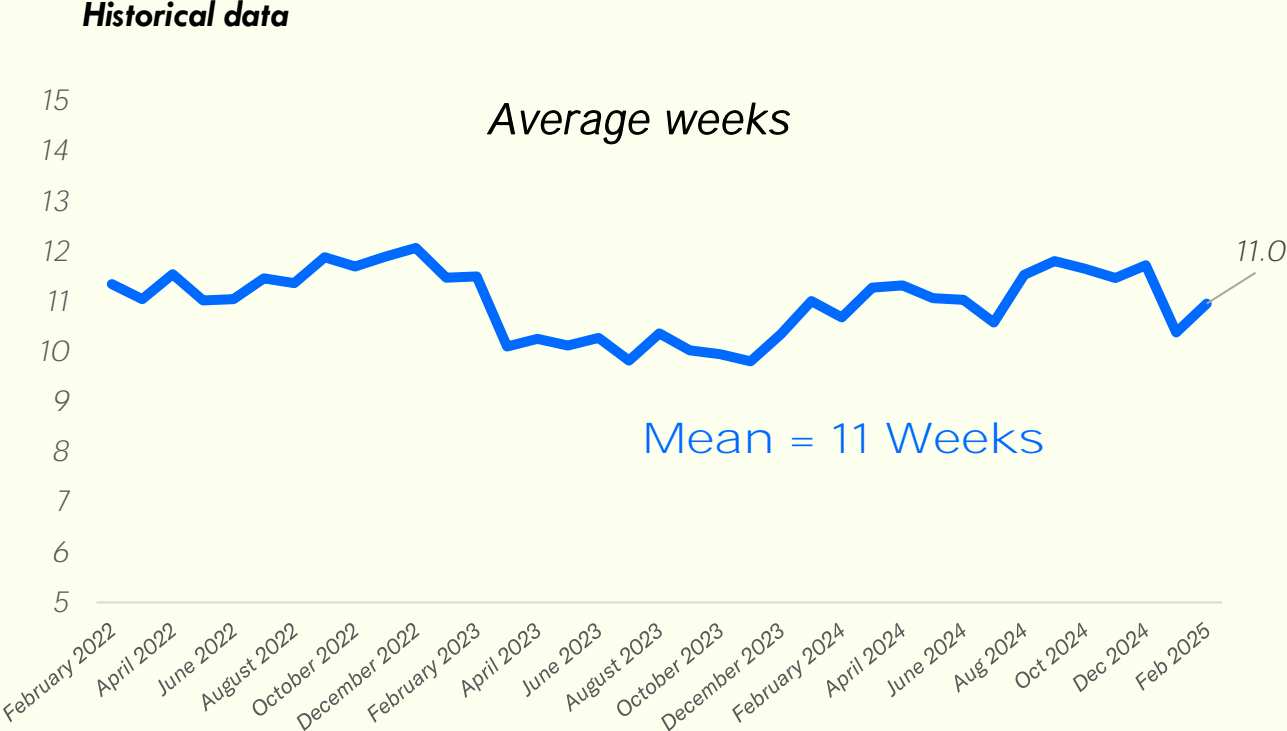
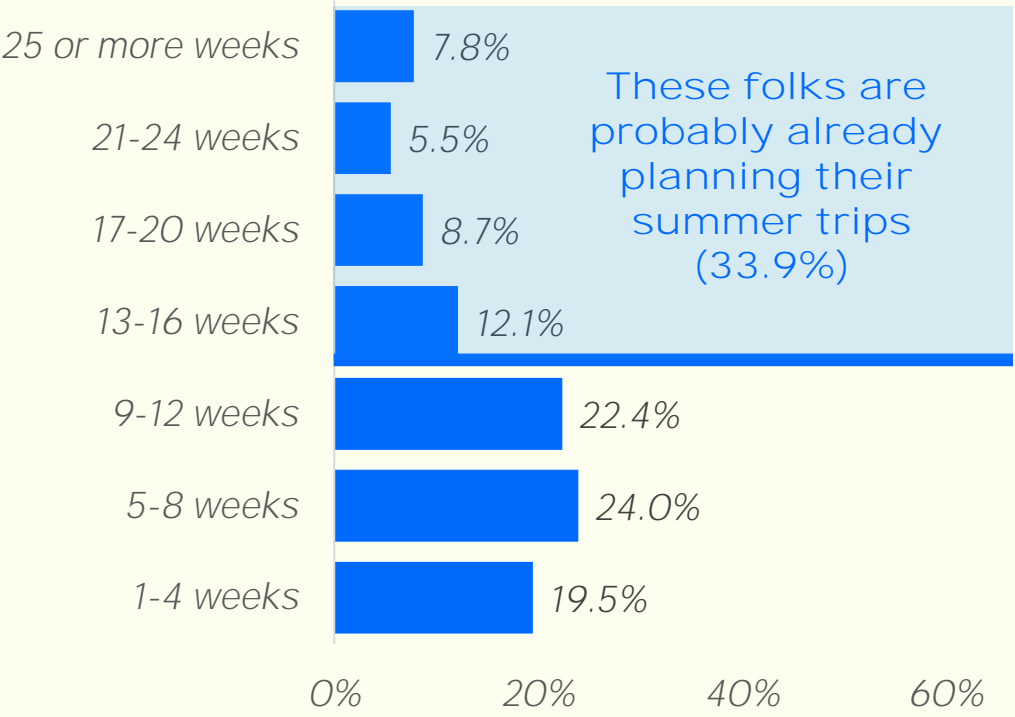
Domestic hotspots include New York, Las Vegas, Florida, California and Chicago

Question: Which DOMESTIC DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS?



Travel planning windows suggest that we're now entering the heart of summer travel planning season

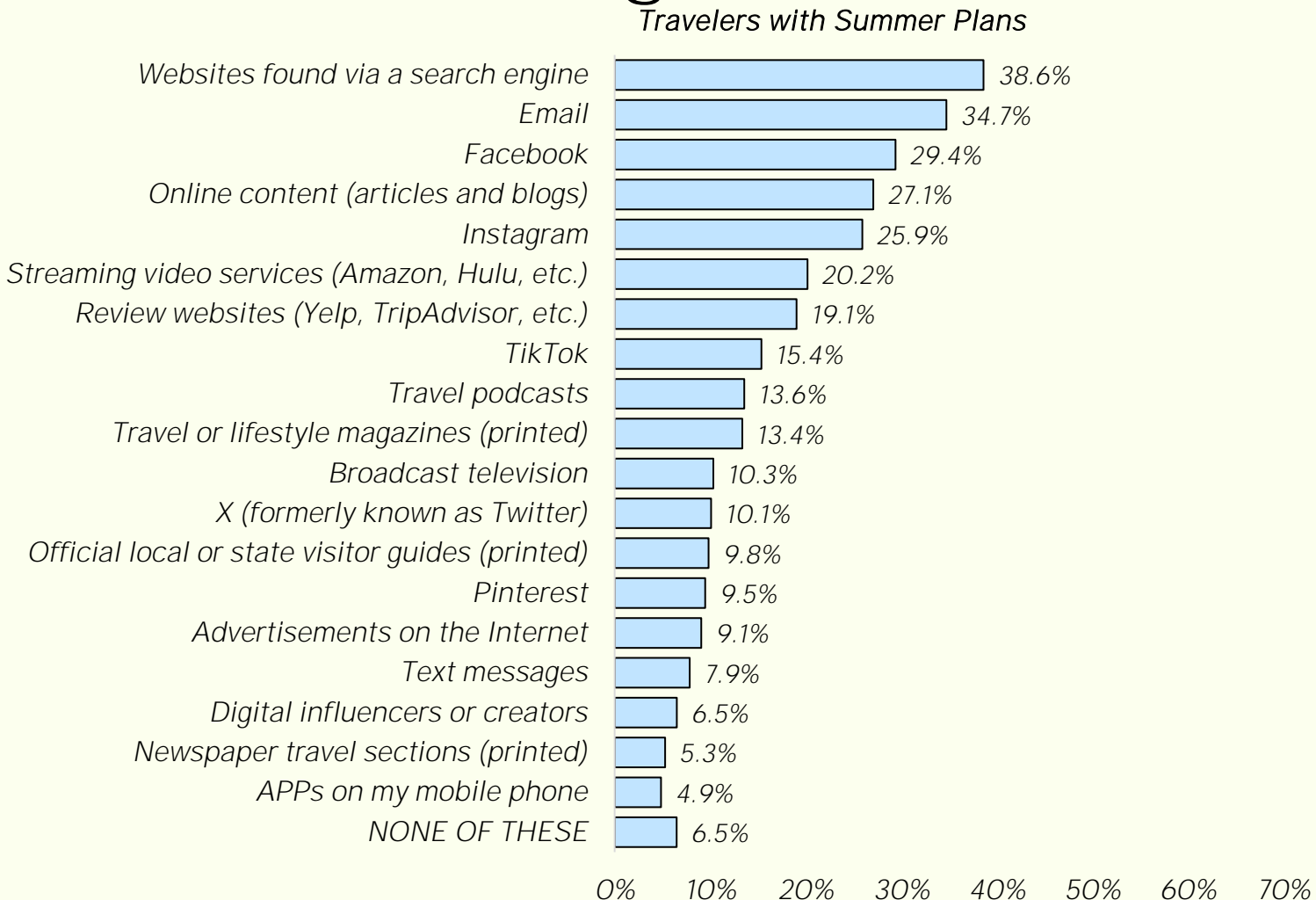
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



Top destination inspiration sources for summer travelers include search engines, email campaigns and Facebook & Instagram

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? (Please select all that apply)



Marketing Travel

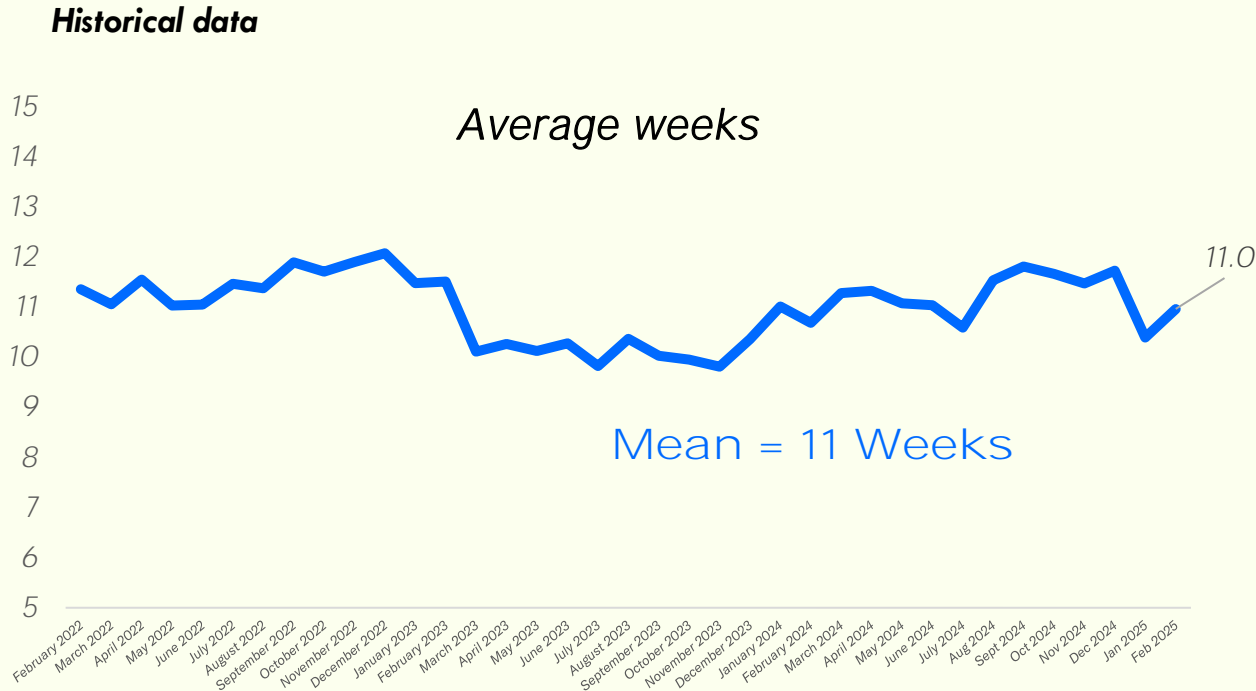
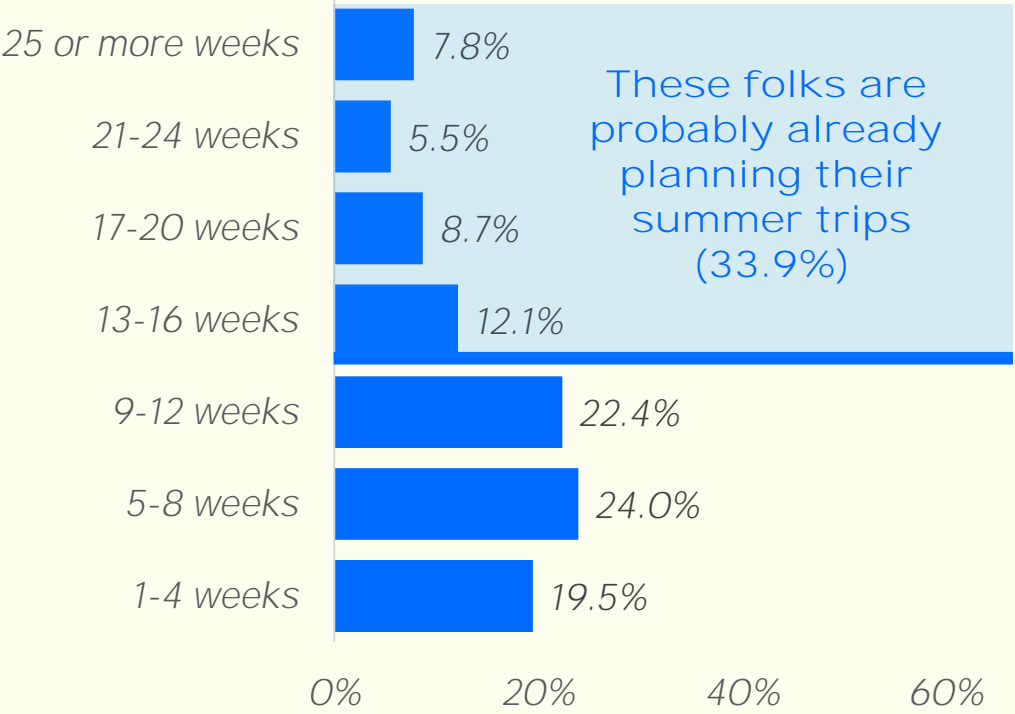


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Travel planning windows suggest that we're now entering the heart of summer travel planning season

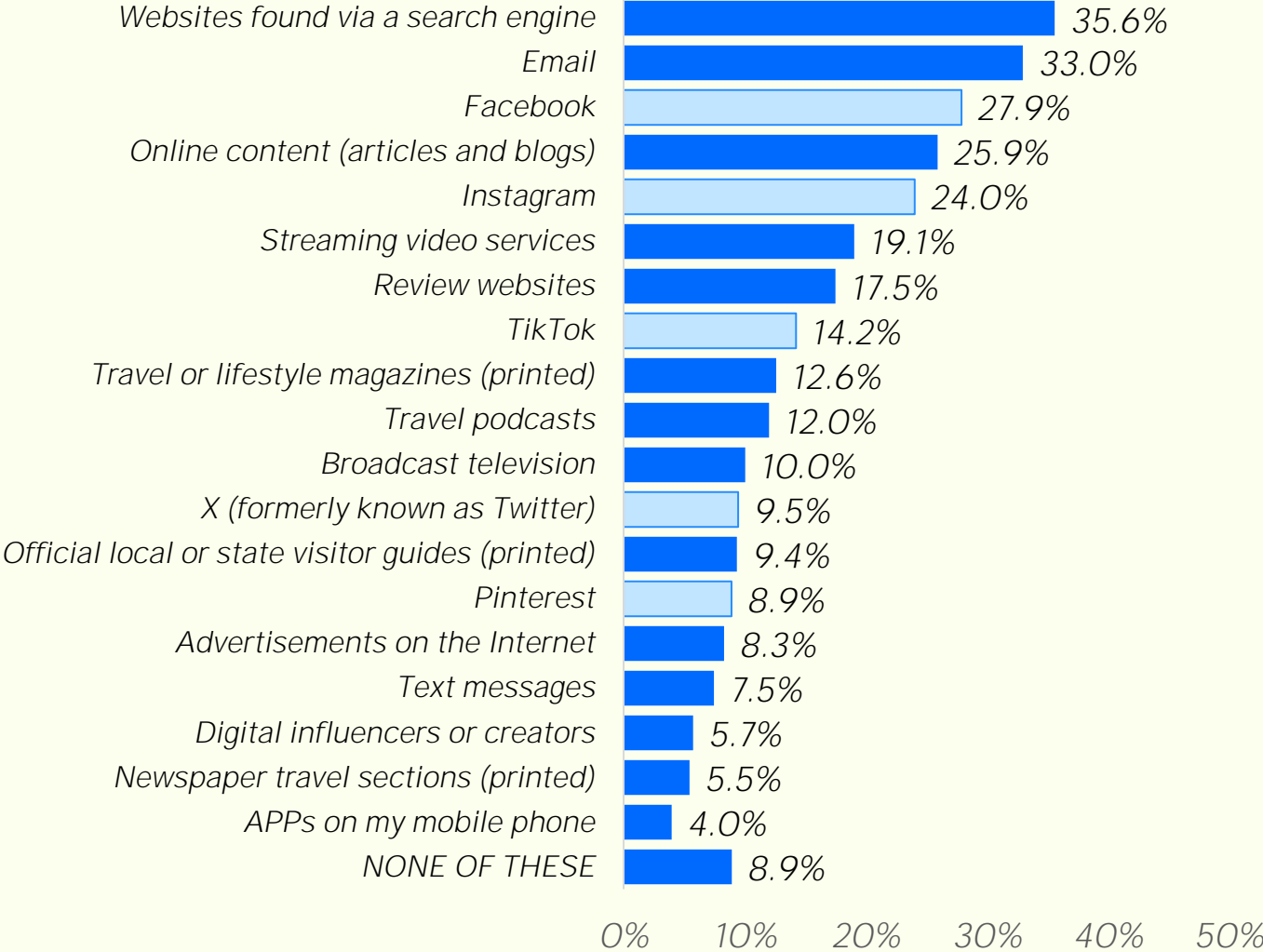
Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)?



American travelers' top destination inspiration sources

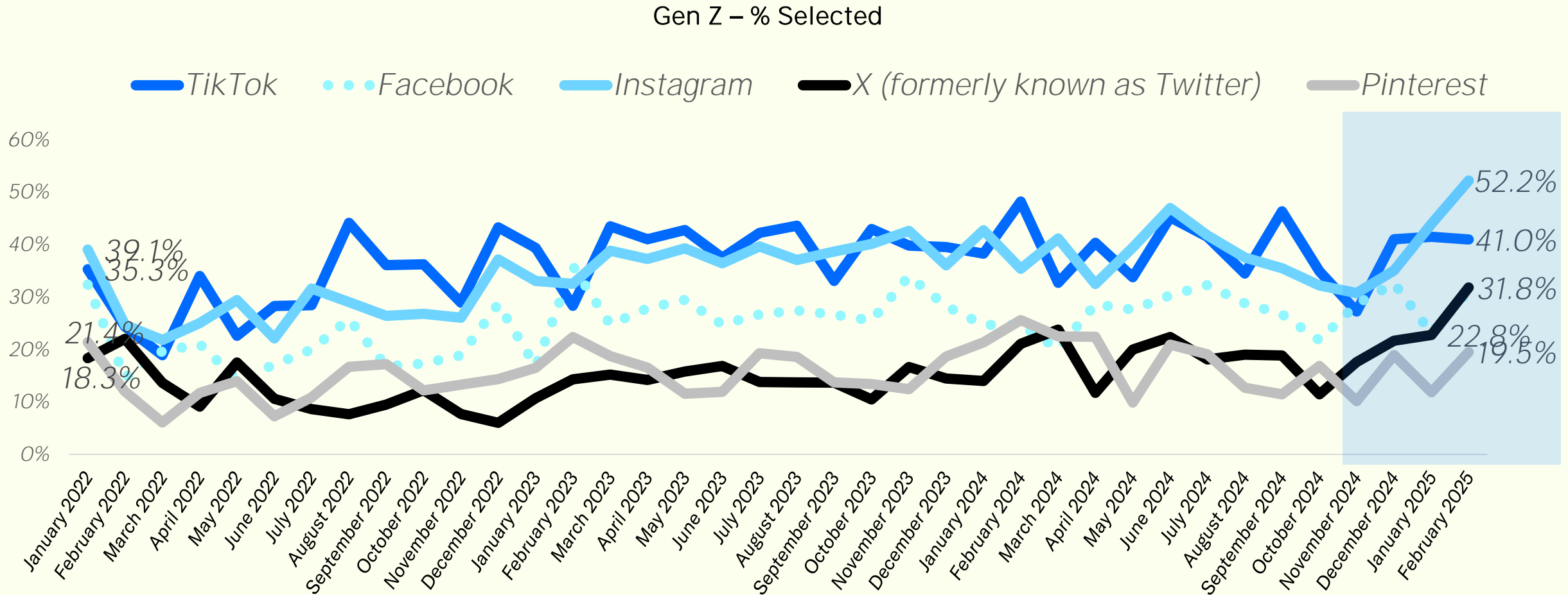
Question: Please think about how travel destinations could best reach you with their messages right now.

Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)



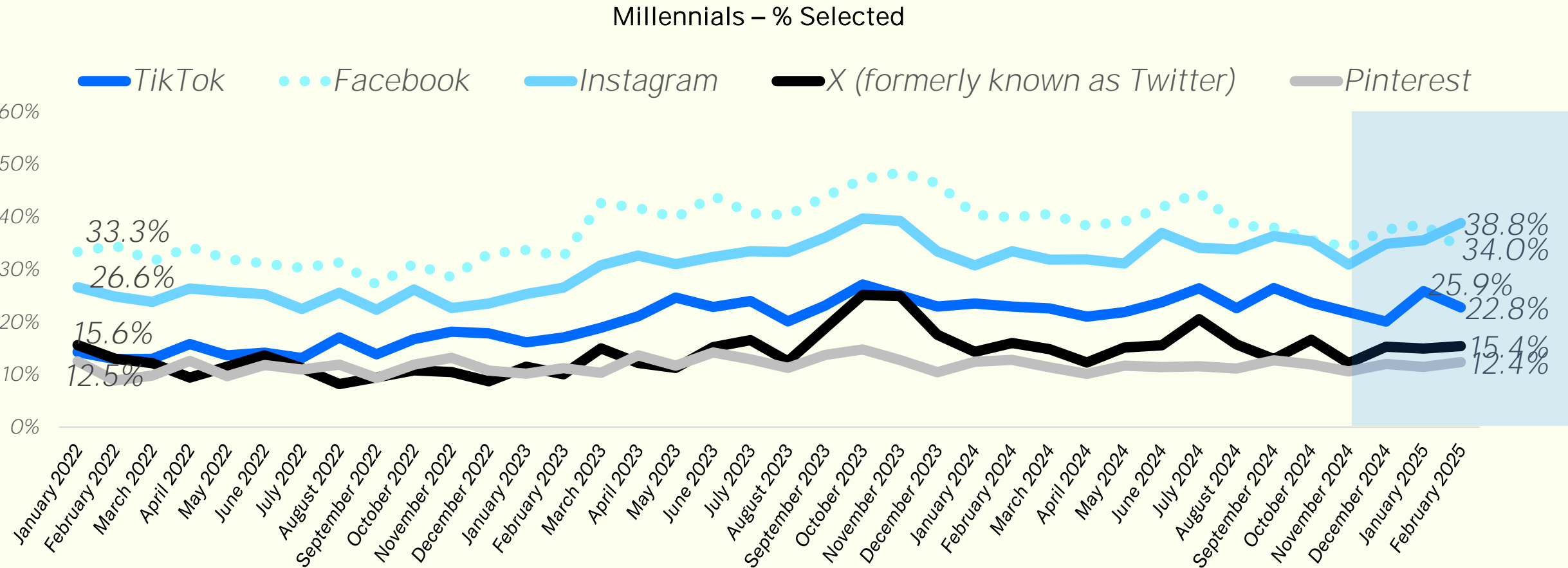
Social Media as Sources of Destination Inspiration — Gen Z (2022-2025)

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? (Please select all that apply)



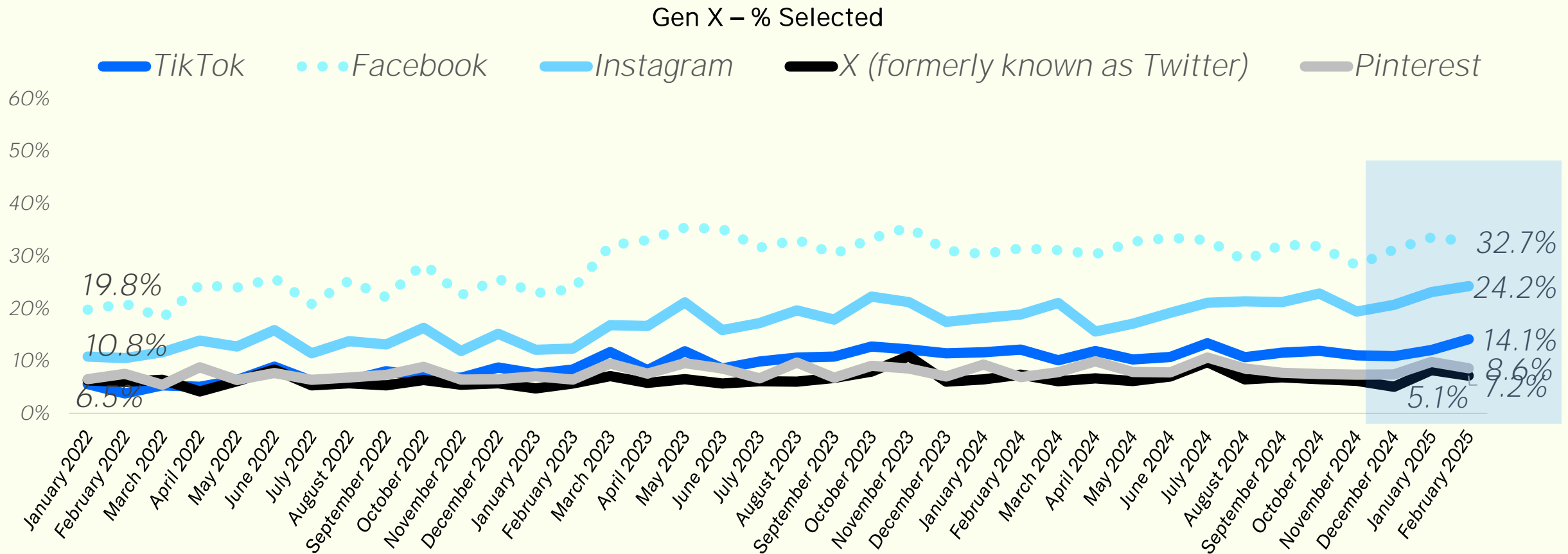
Social Media as Sources of Destination Inspiration—Millennials (2022-2025)

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? (Please select all that apply)



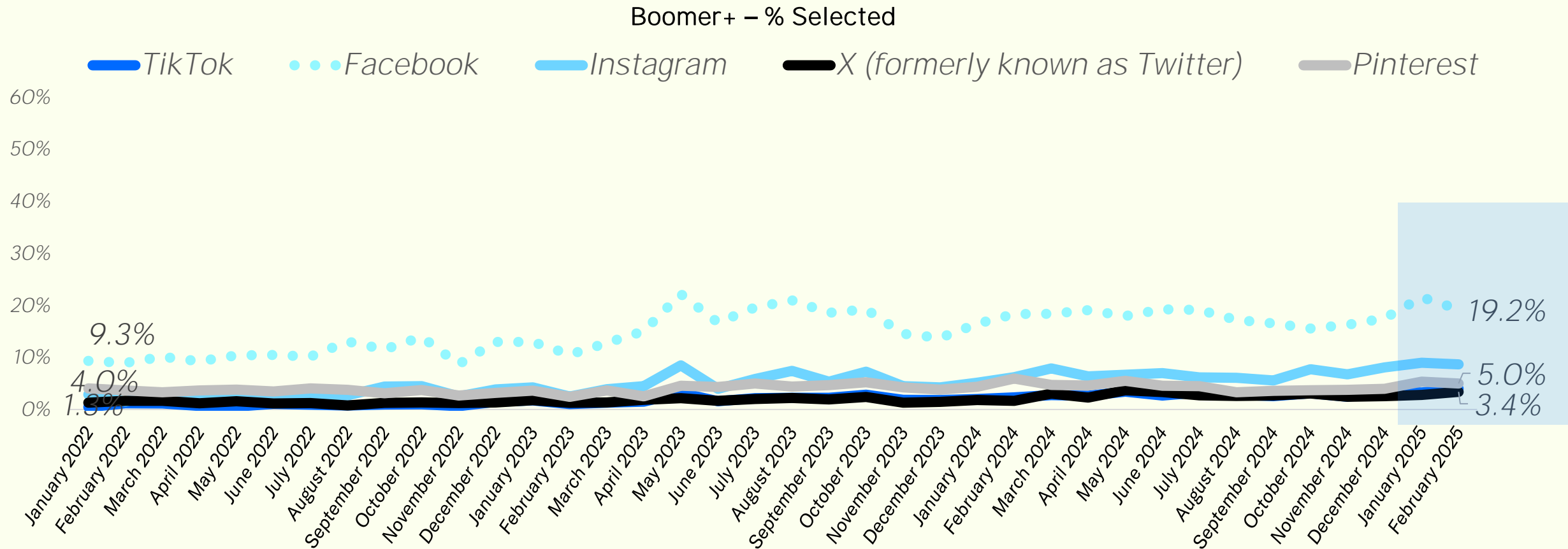
Social Media as Sources of Destination Inspiration — Gen X (2022-2025)

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? (Please select all that apply)



Social Media as Sources of Destination Inspiration—Boomers (2022-2025)

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? (Please select all that apply)



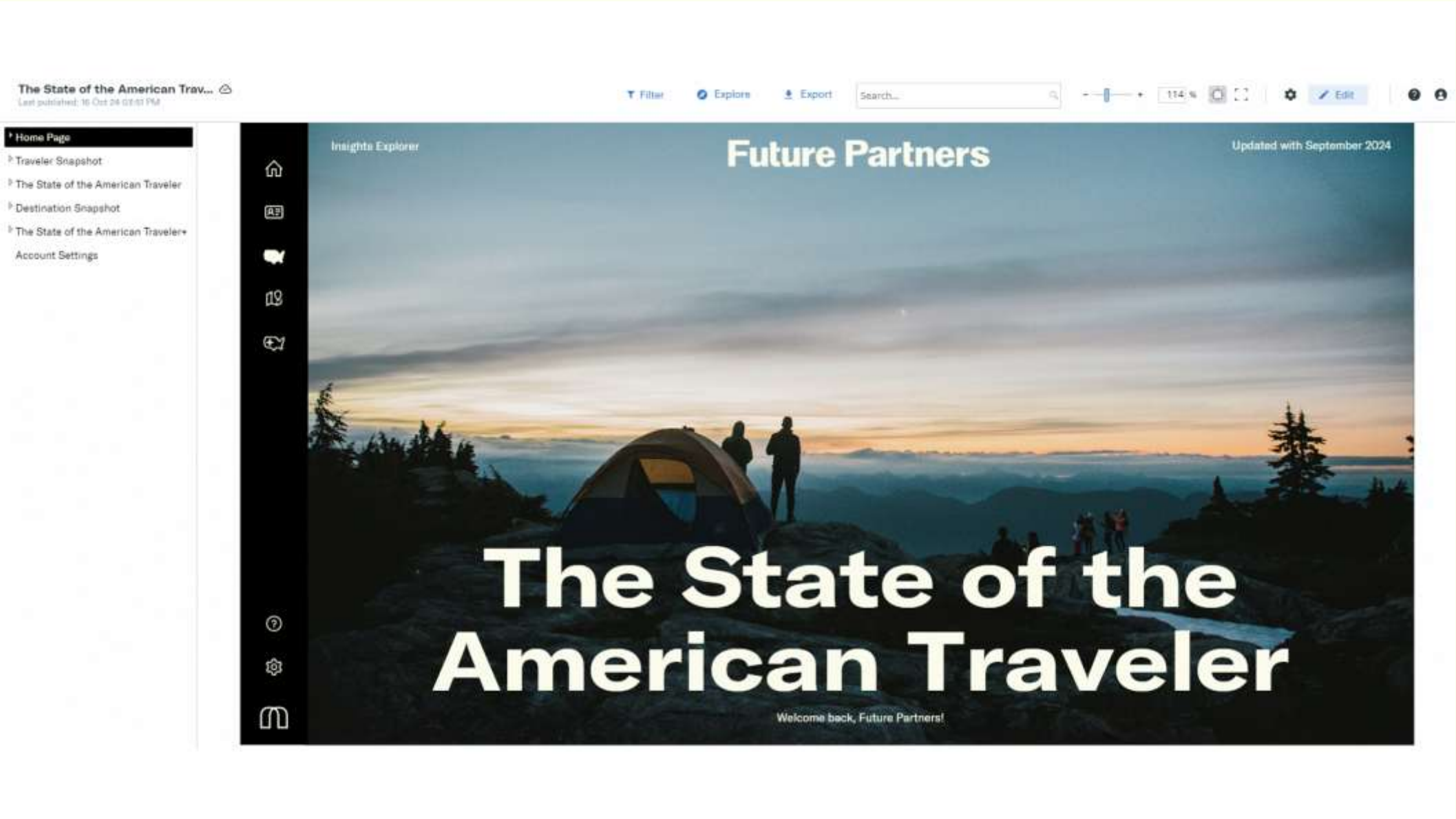
In Summary: Summer Travel Expectations

- As we enter the summer travel planning season, 59.2% percent of American travelers already have trips imagined for the summer.
- Those with travel plans show high levels of enthusiasm.
- Economic anxiety may critically shape the landscape of travel this summer, as travel expectations are linked closely to income and the key impediments to travel this summer are economic.
- Travel rewards programs and budget-friendly hotels and destinations will be popular with Americans traveling this summer.
- Travel abroad will likely be historically popular this summer, with Italy, Canada, Mexico and Japan topping the list of popular destinations.

*April Livestream
Registration*



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Upcoming Deep Dive:
The State of the American Traveler
Destinations Edition 2025

With Miles Partnership

March 18th 3:00pm PT
Register Today



Uncover the latest trends shaping how U.S. travelers decide where to go

The State of the International Traveler:

Insights to Grow Your Share of International Inbound Visitation

Gain Comprehensive Marketing Insight on the Following Countries:

- Argentina
- Australia
- Brazil
- Canada
- China
- Colombia
- France
- Germany
- India
- Italy
- Japan
- Mexico
- The Netherlands
- South Korea
- Spain
- United Kingdom



Let's keep the conversation going



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