

# Future Partners

The State of the  
American Traveler

February 2025

We're a creative insights firm shaping strategies that capture hearts, minds, and *market share*.

**Future Partners**

# Future Partners

Opportunity  
powered by **insight.**

# Today

- Travel & Human Connection
- Travel Sentiment Overview
- Love, Travel & Connection in the Time of Robots

*March Livestream  
Registration*



Presentation deck and recording will be available on our website:

[FuturePartners.com](https://FuturePartners.com)

*March Livestream  
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# 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*
- *4,000+ fully completed surveys collected each wave.*
- *Survey collected [January 15-22](#)*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*

*United States Census Regions*



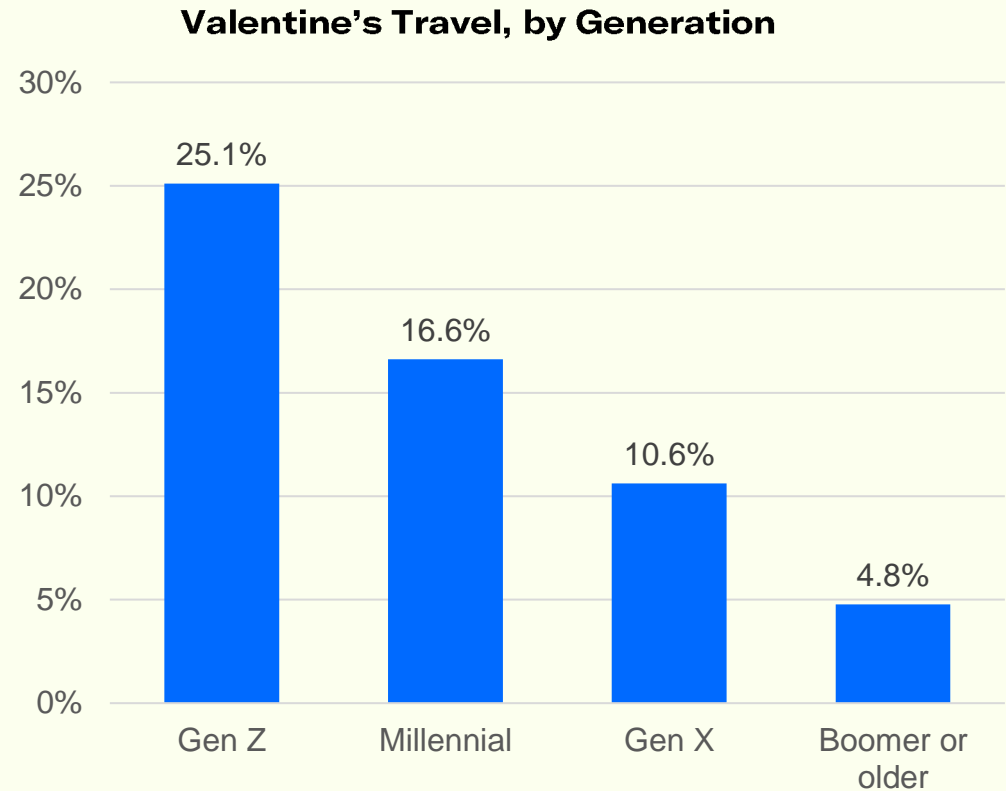
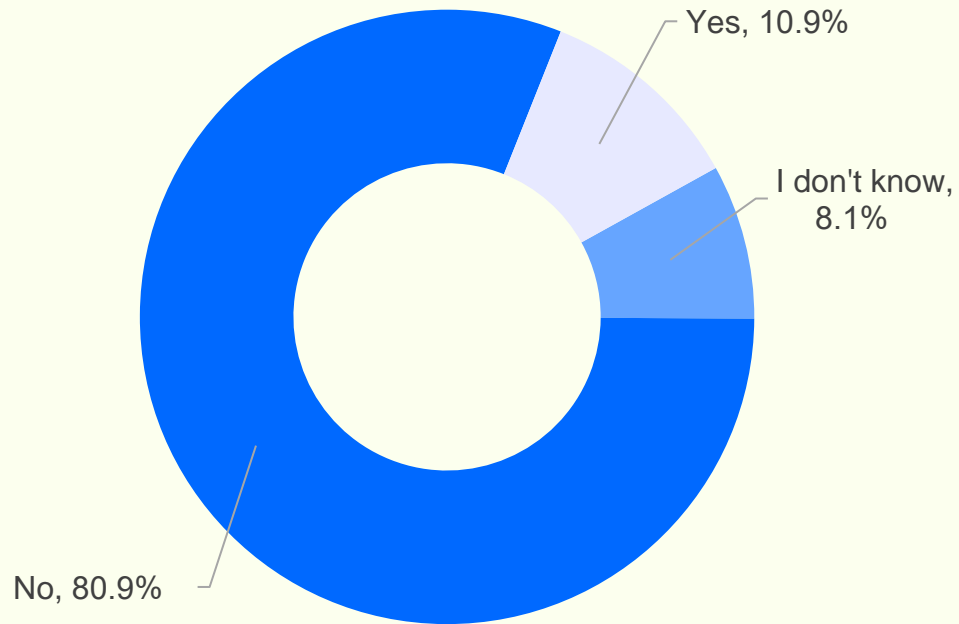
# Travel & Human Connection in 2025



# About 1-in-10 American travelers will journey out **specifically for the upcoming Valentine's Day holiday.**

Question:

*Do you plan to travel for the St. Valentine's Day holiday this year?*

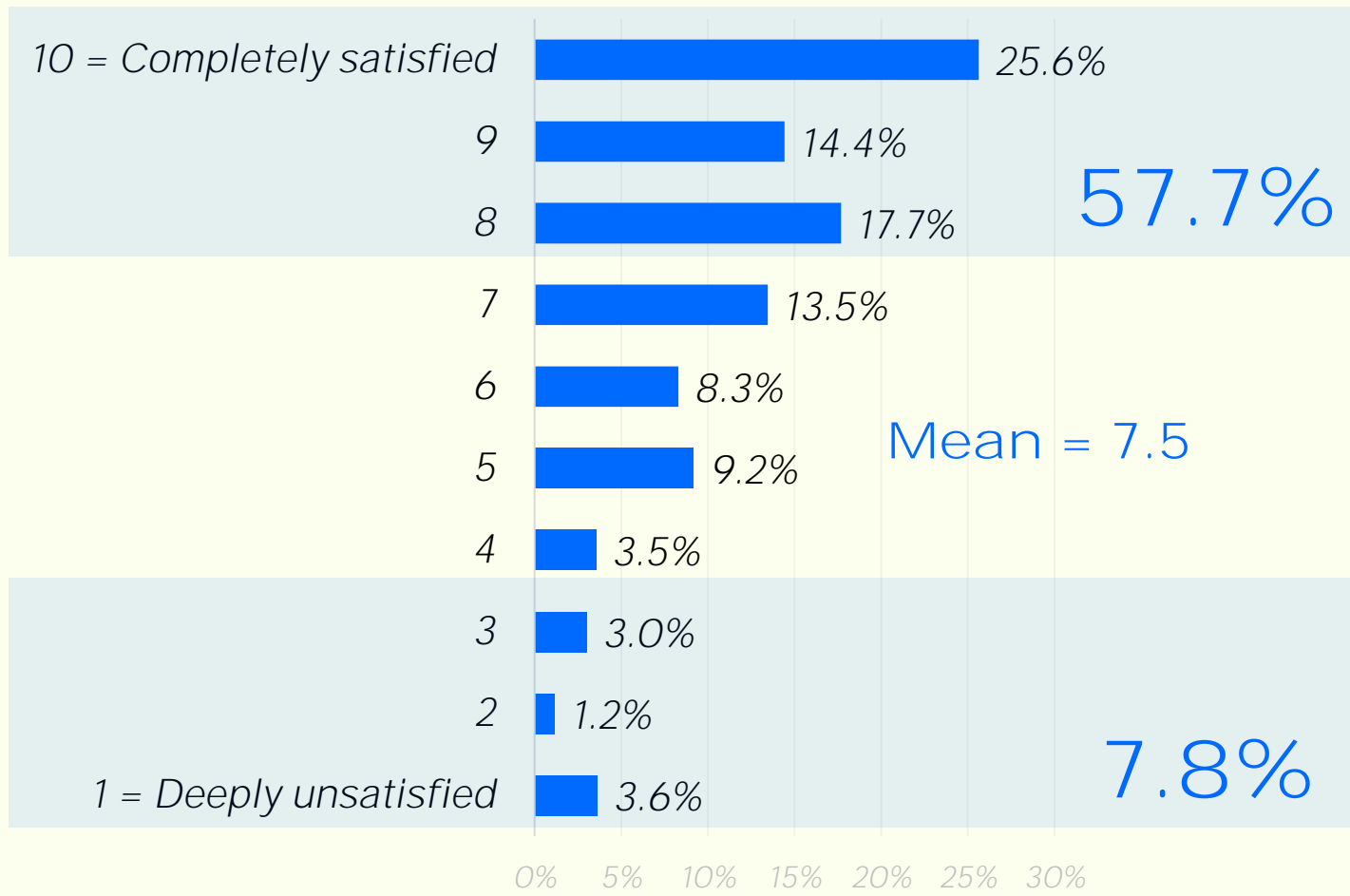
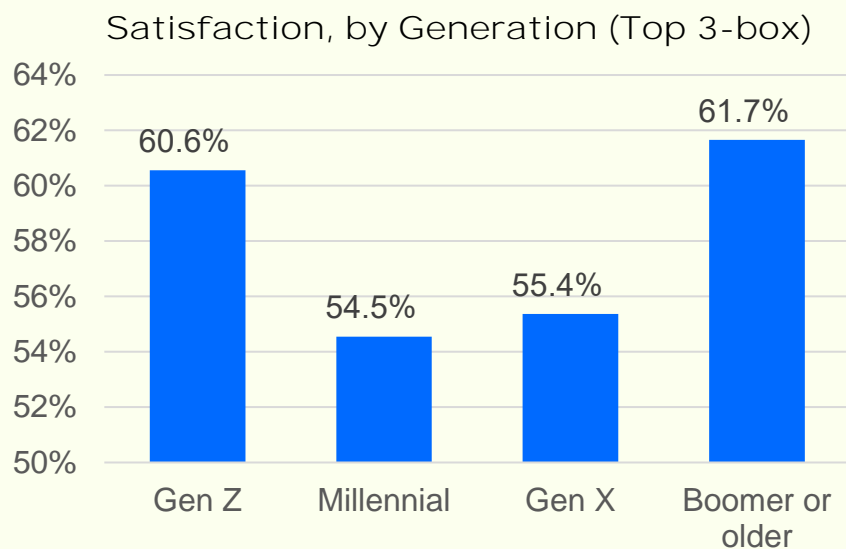




# Most travelers report being satisfied with the quality of their personal relationships.

Question:

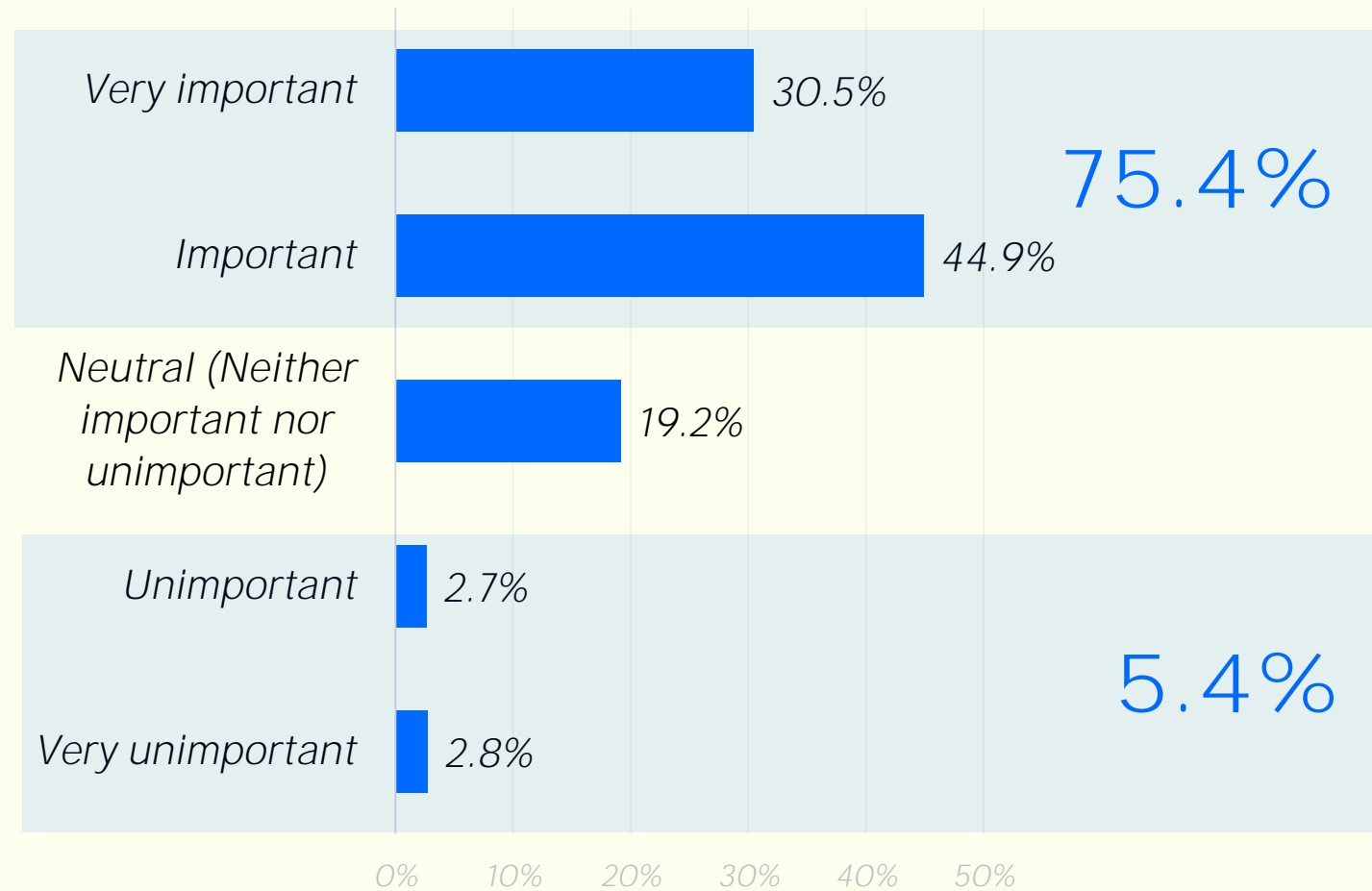
*How satisfied are you with the quality of your personal relationships?*



The clear majority of travelers find building connection with **the friends and family they travel with** to be important.

Question:

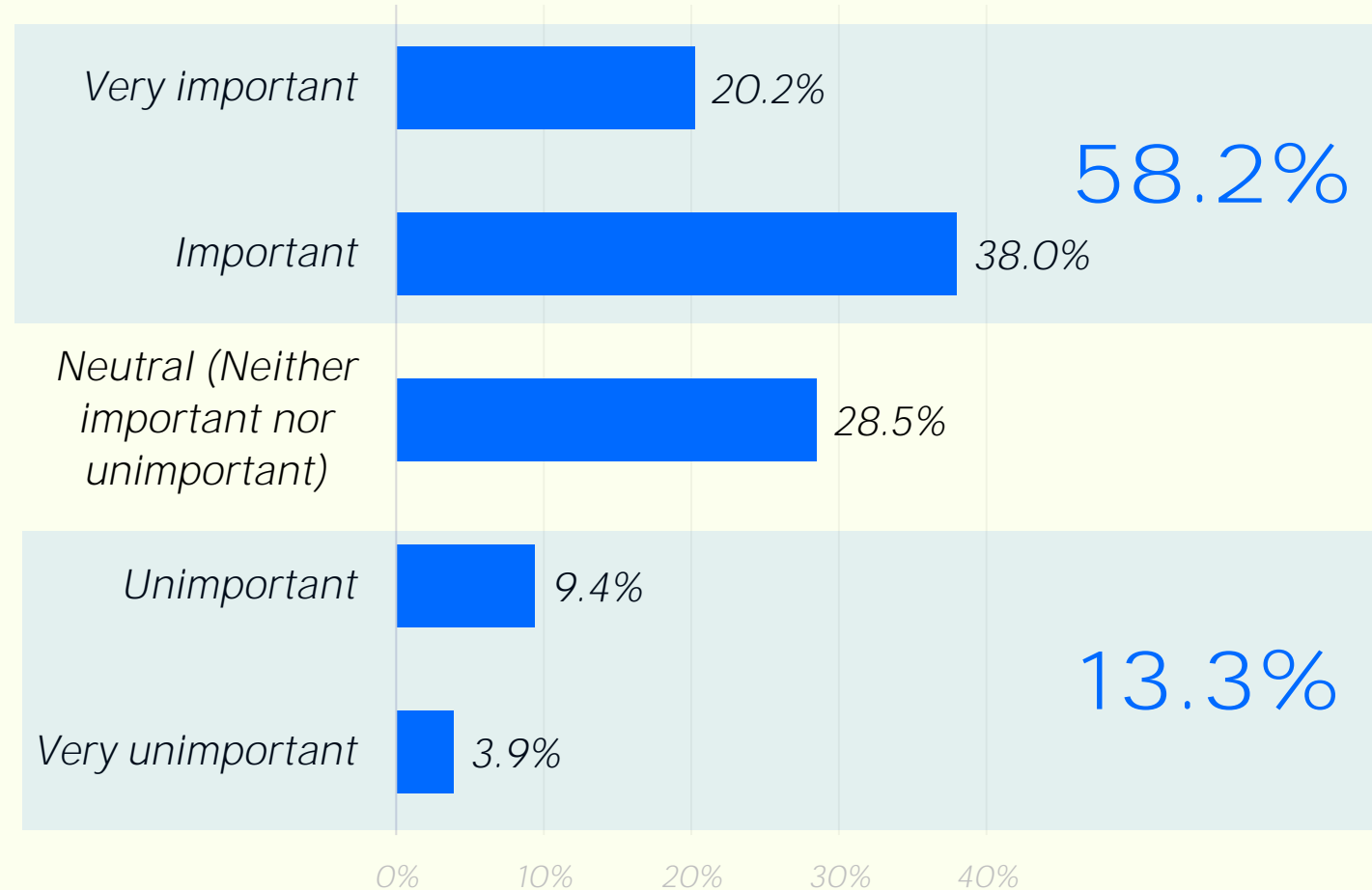
*While traveling for leisure, how important is it to build connection with any friends or family that are traveling with you?*



# Staying connected with **people back home** while traveling also matters to most.

Question:

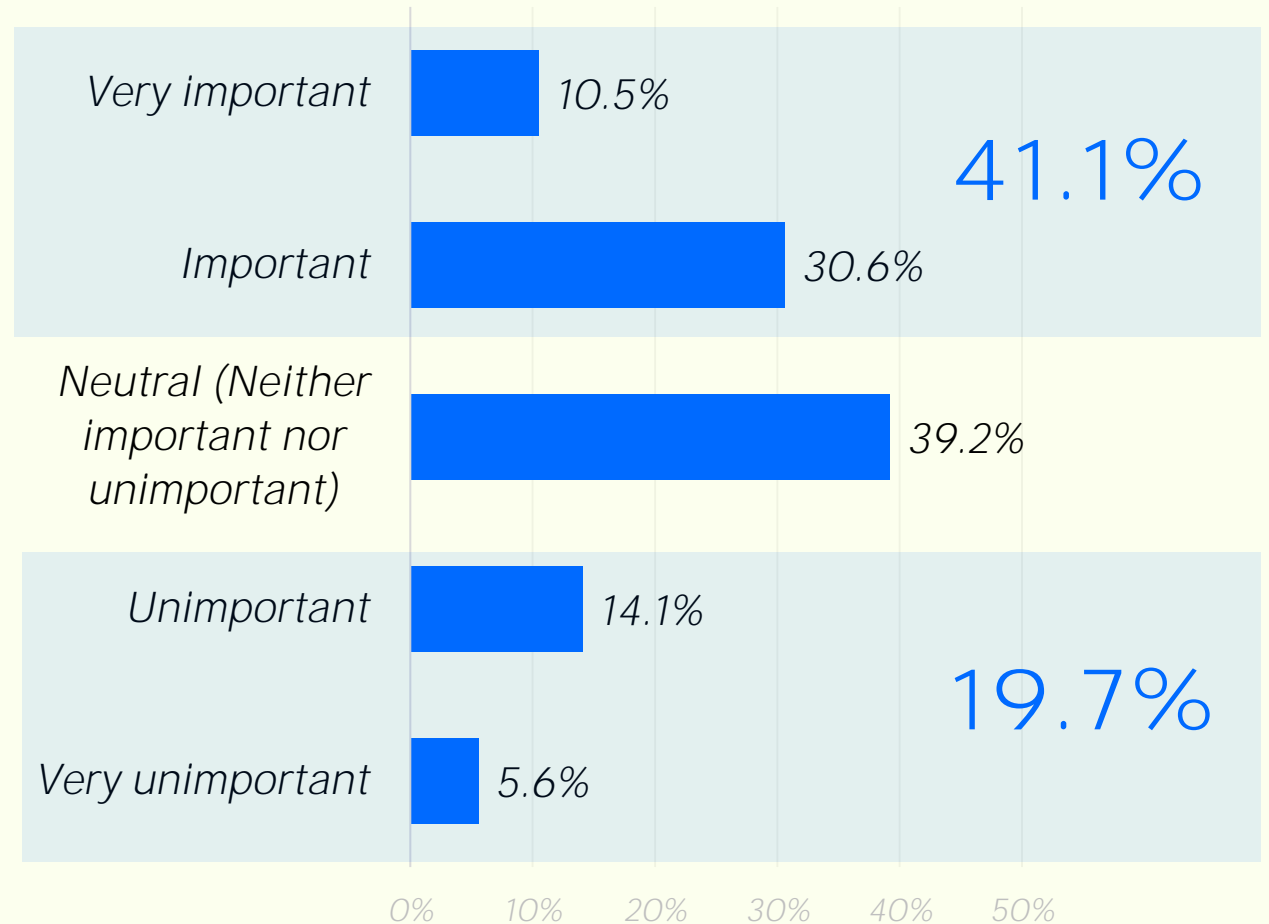
*While traveling for leisure, how important is it for you to stay connected with your friends or family back home?*



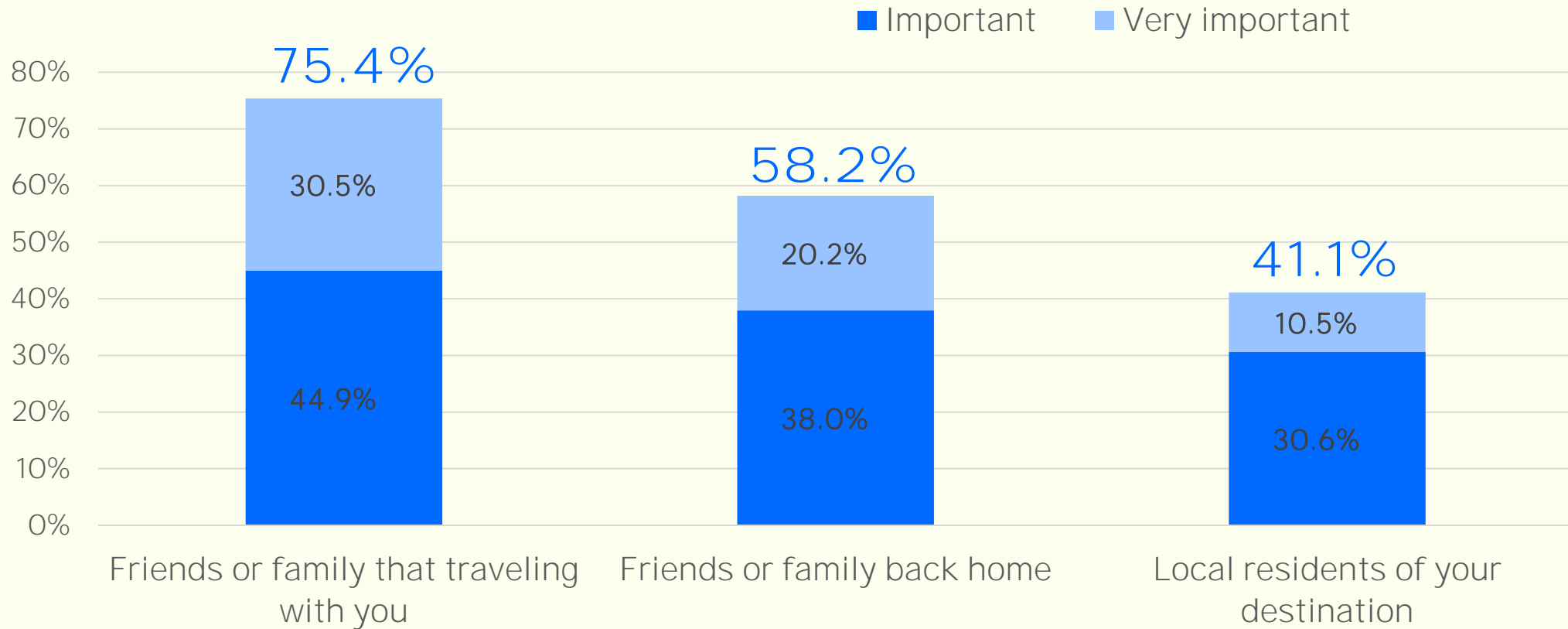
Connecting with **local residents** is of lesser importance, but still more than 4-in-10 find this to be important.

Question:

*While traveling for leisure, how important is it to meet and connect with local residents of your destination?*



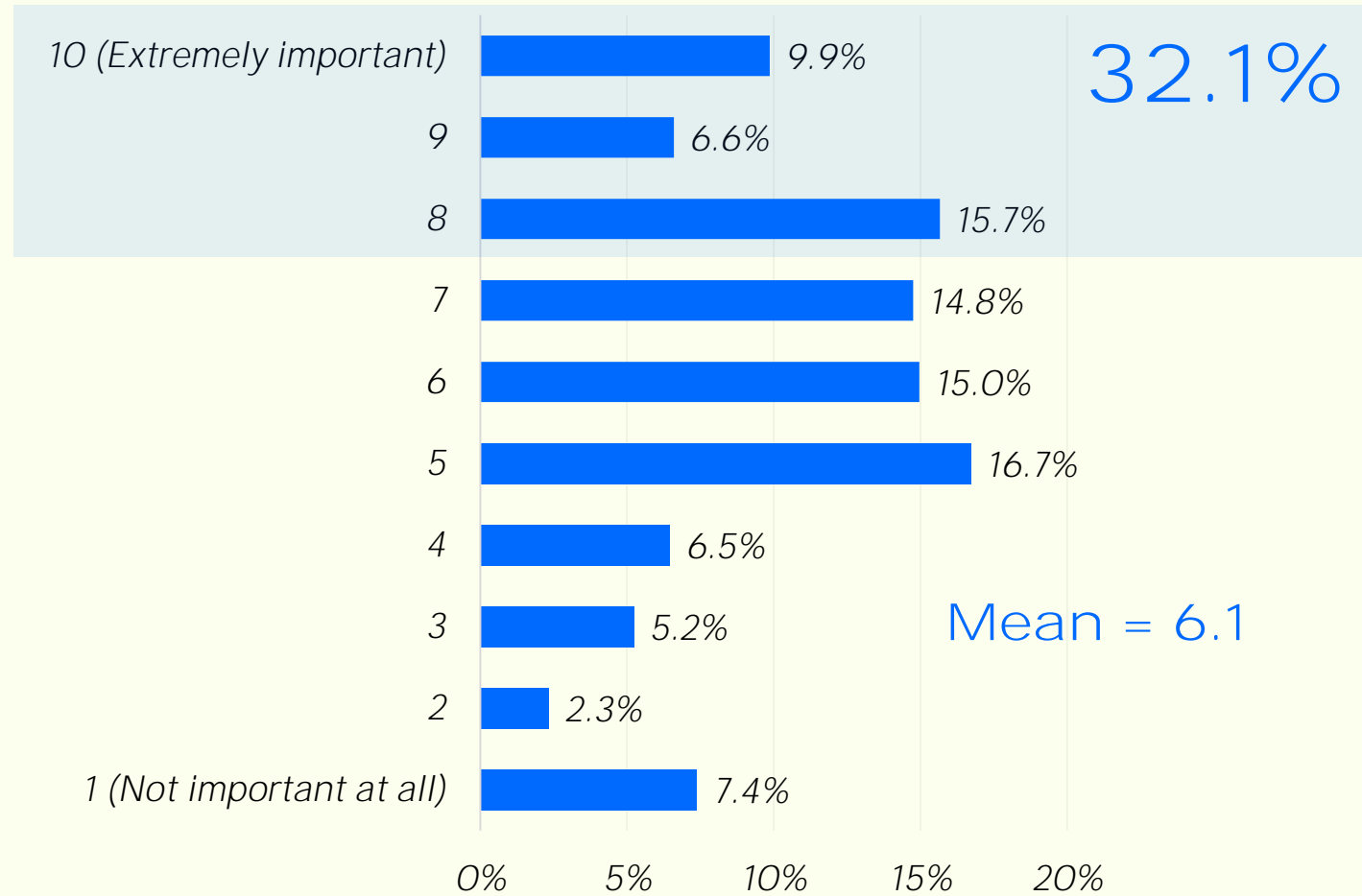
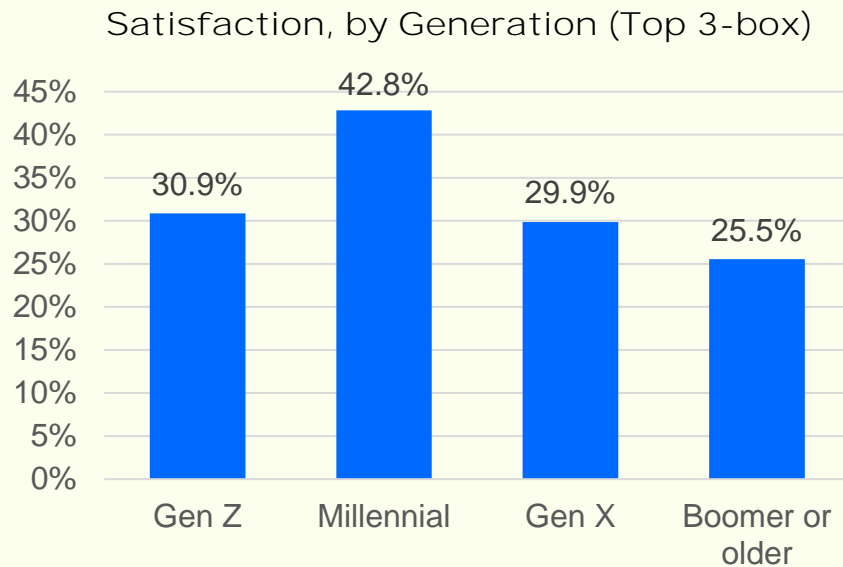
Connecting with local residents is of lesser importance, but still more than 4-in-10 find this to be important.



# The social aspects of travel contribute to overall travel satisfaction.

Question:

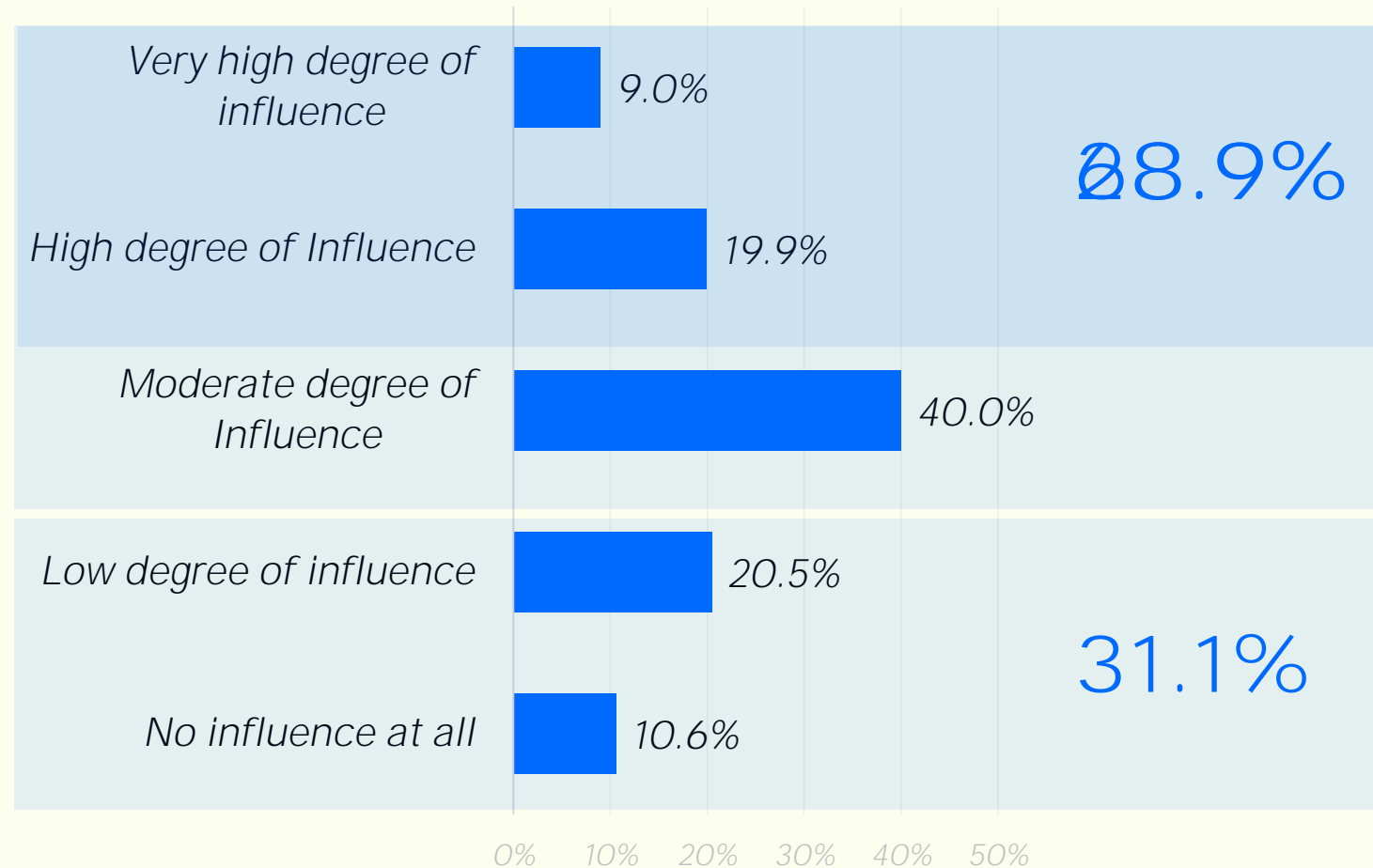
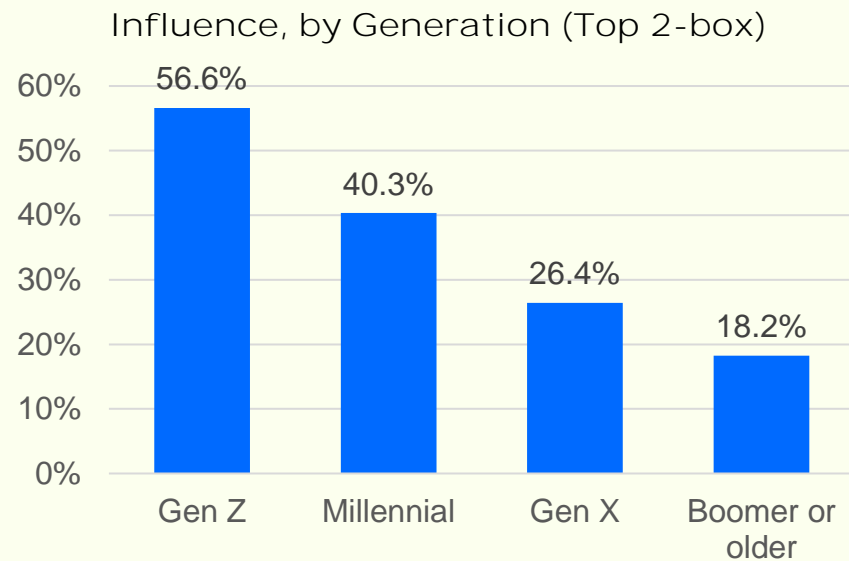
*On a scale from 1 to 10, how important is the social aspect of travel in contributing to your overall satisfaction with your travel?*



# Younger travelers are the most likely to say their social circles influence their choice of travel destinations.

Question:

*How much influence do friends, family, or social circles have on your choice of travel destinations?*

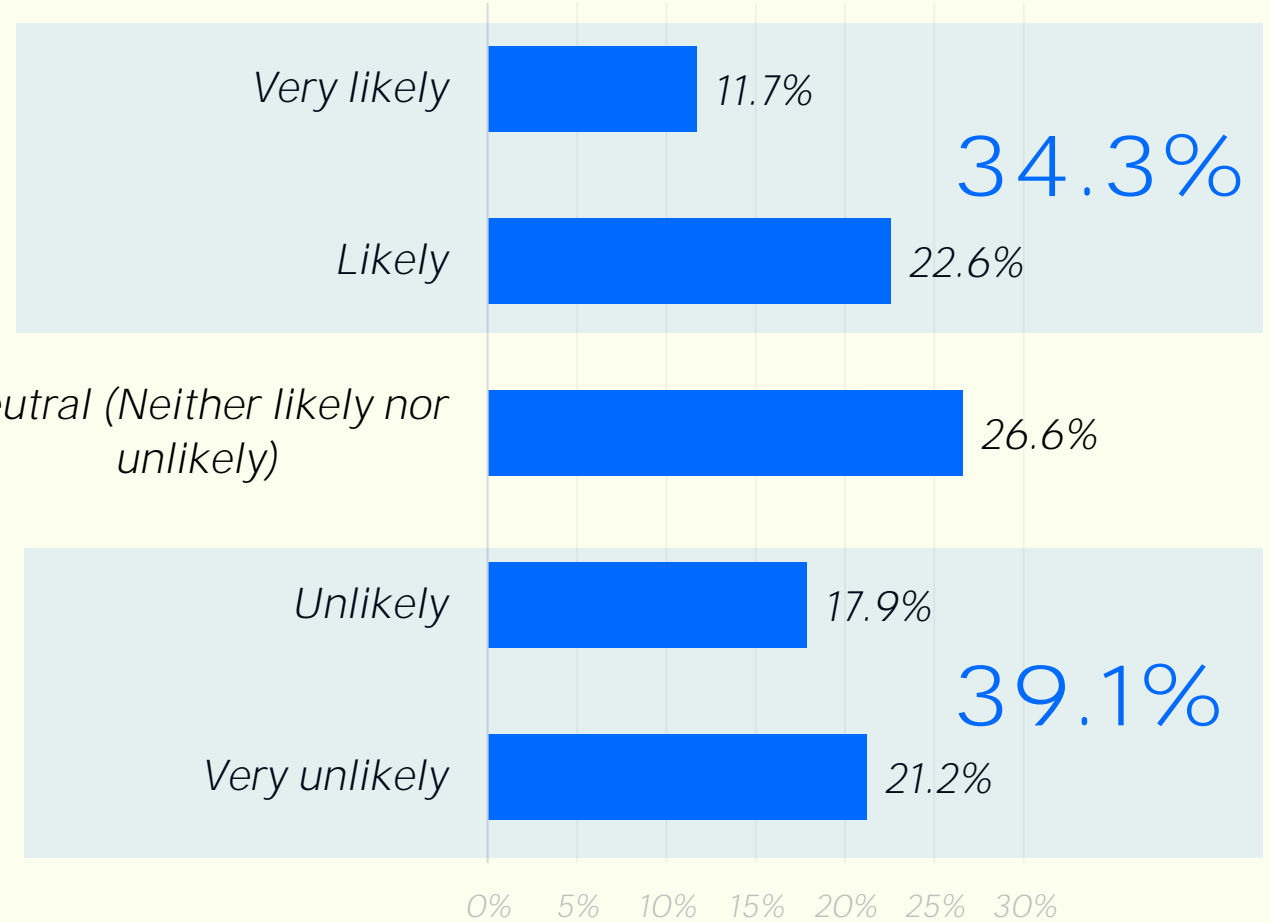
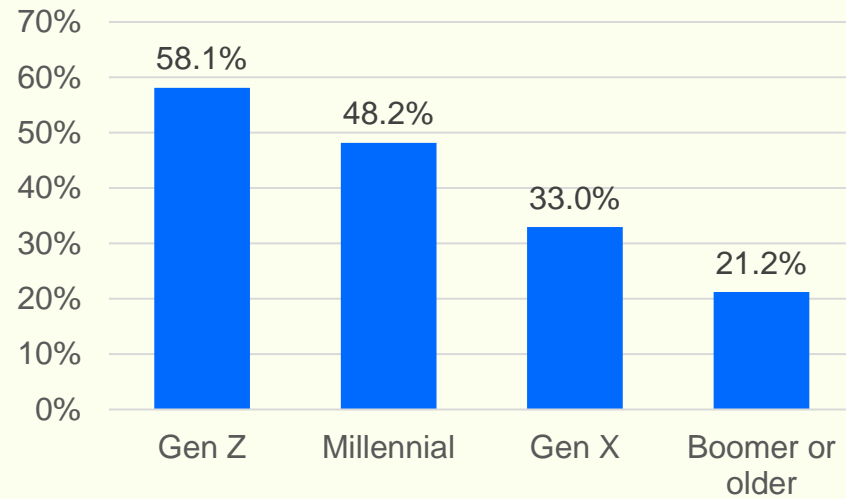


# About a third of travelers use **social media or apps** to connect with others around their trip.

Question:

*How likely are you to use social media or apps to connect with other travelers or locals before, during, or after your trip?*

Likely usage, by Generation (Top 2-box)





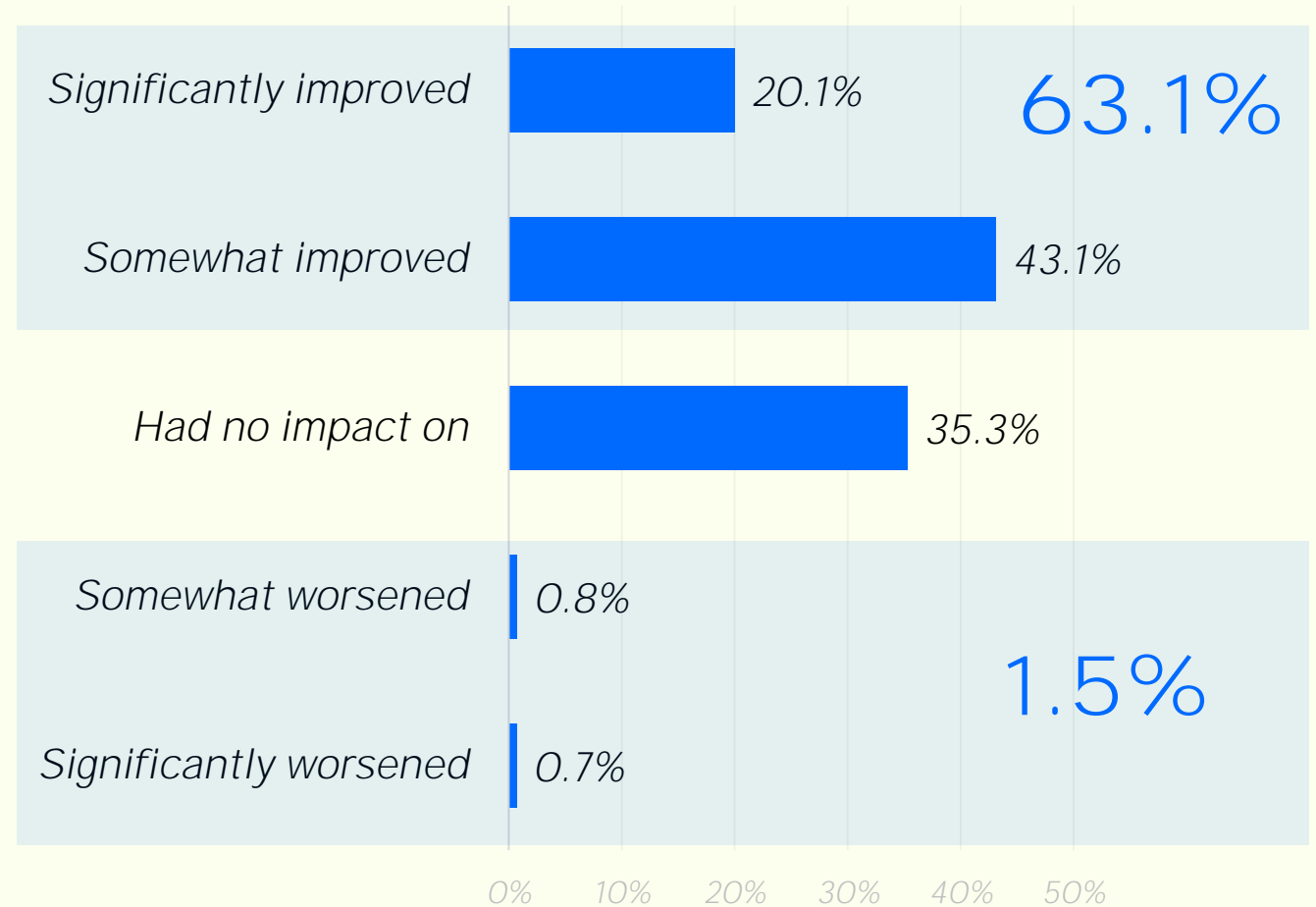
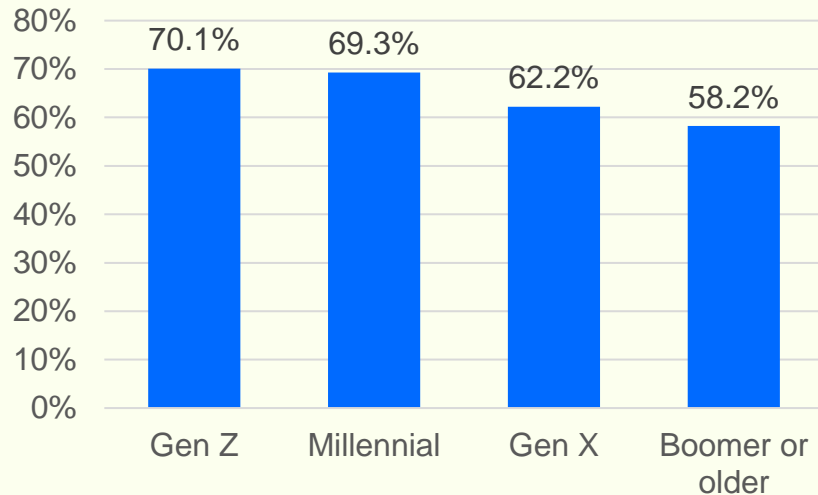
# Travel improves our relationships.

Question:

*How have your leisure travel experiences impacted the quality of your personal relationships? (Select one to complete the sentence)*

*Overall, leisure travel has \_\_\_\_\_ the quality of my personal relationships.*

Improvement, by Generation (Top 2-box)



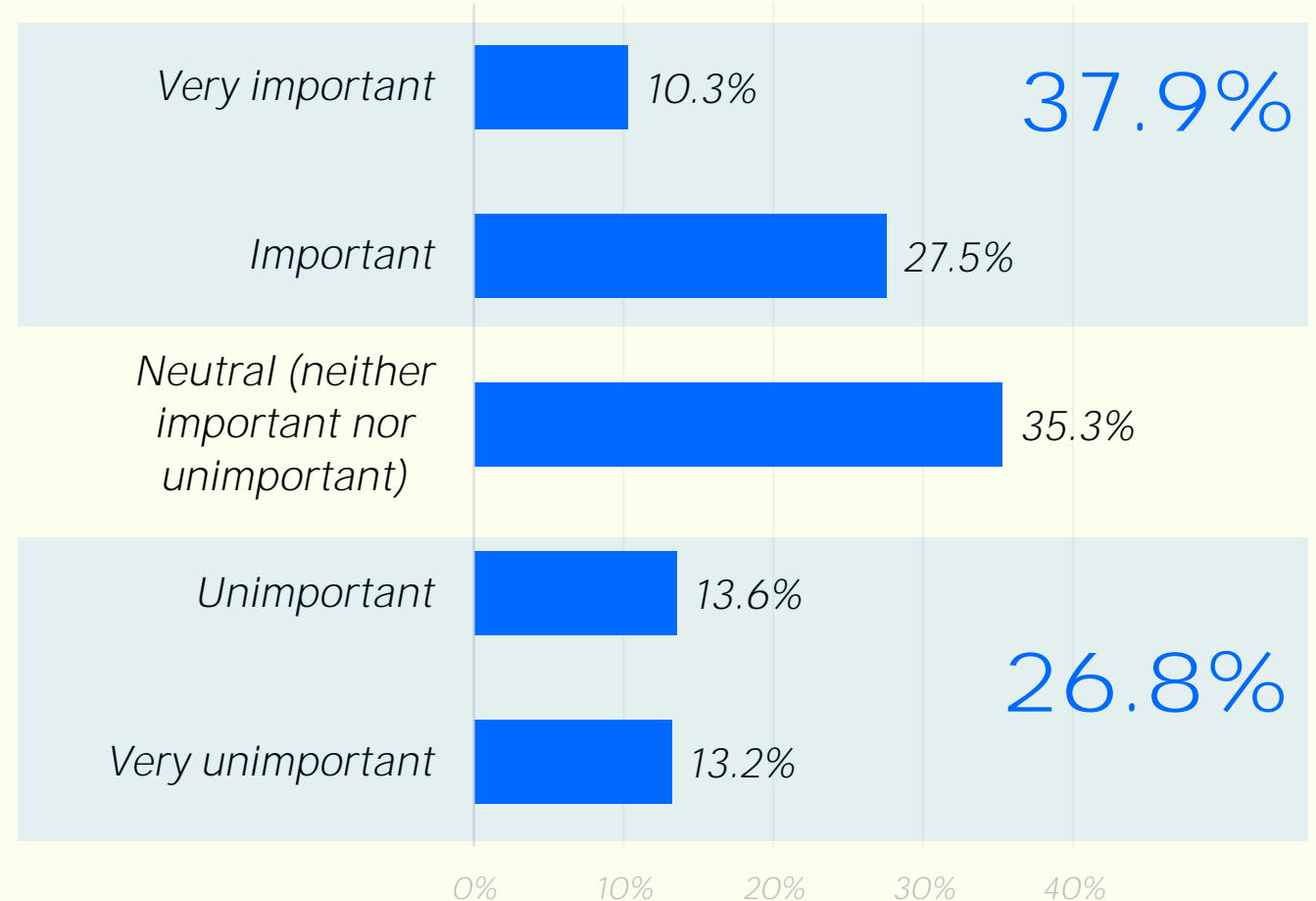
# Let's Talk About Romance



# Nearly, 4-in-10 travelers value romance as a trip attribute.

Question:

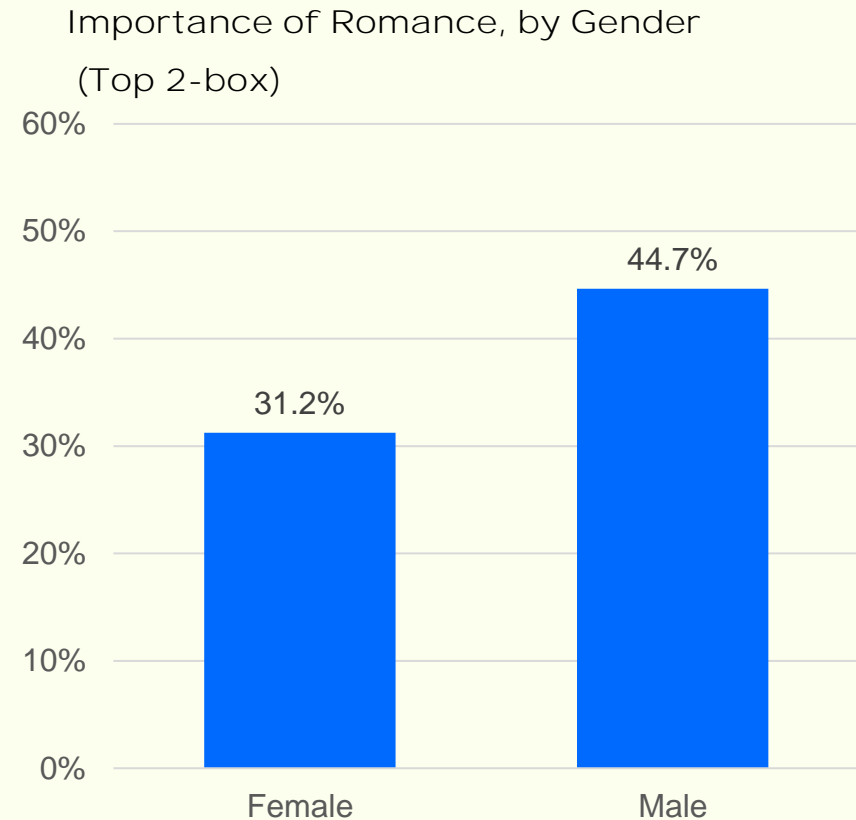
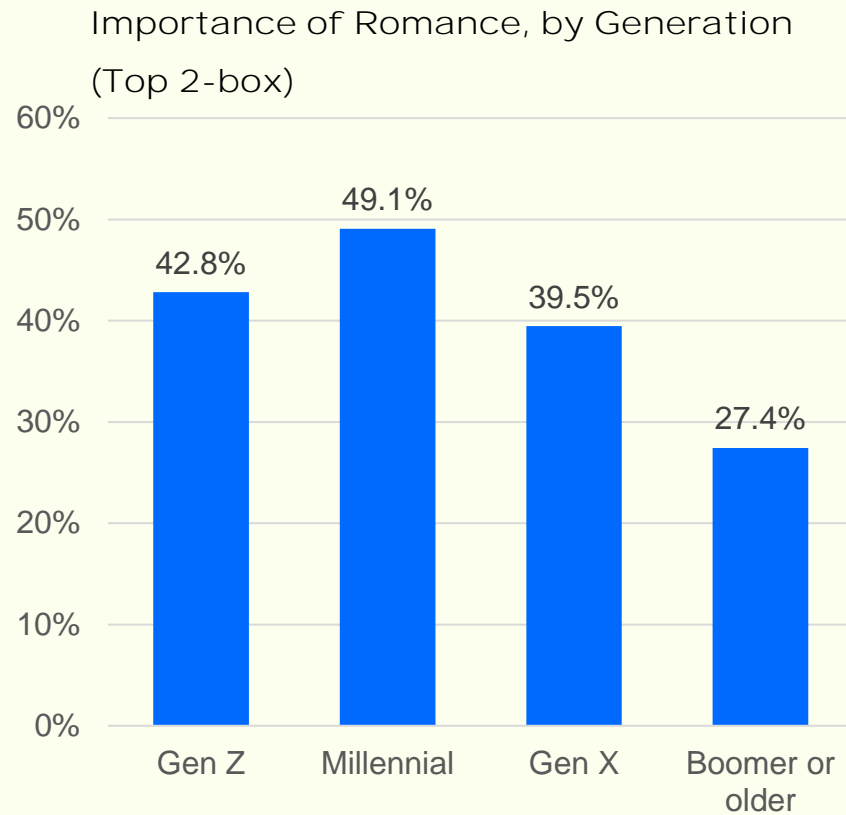
*In general, how important to you is romance in your travel experiences?*



# Millennials and men are the most likely travelers to value romance as a trip element.

Question:

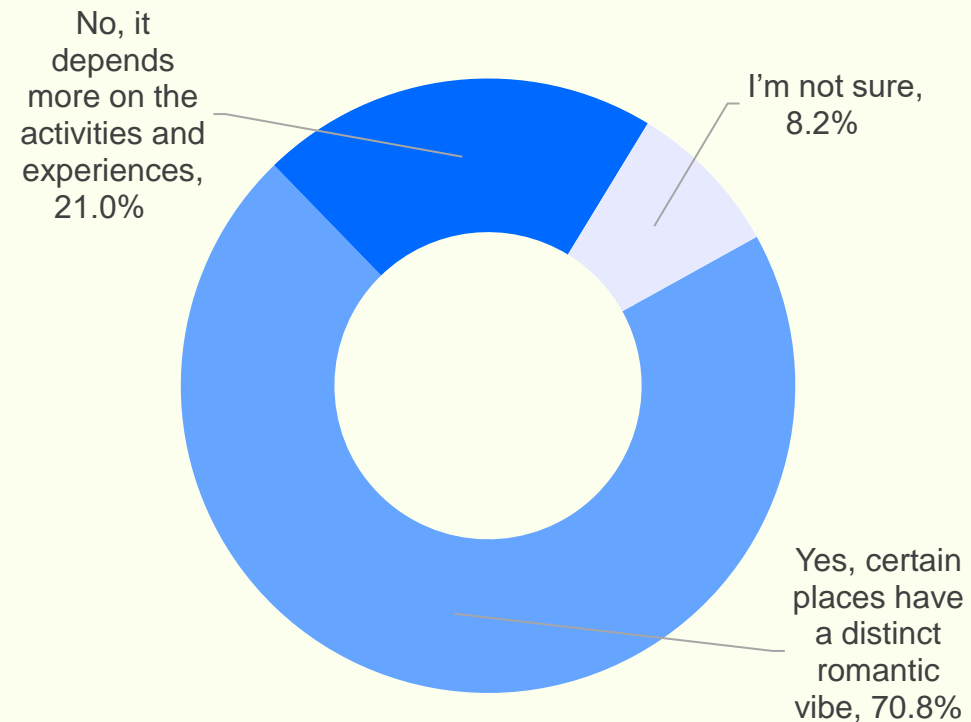
*In general, how important to you is romance in your travel experiences?*



# The clear majority see certain destinations as having a distinct romantic vibe.

Question:

*Do you believe that certain destinations are naturally more romantic than others?*

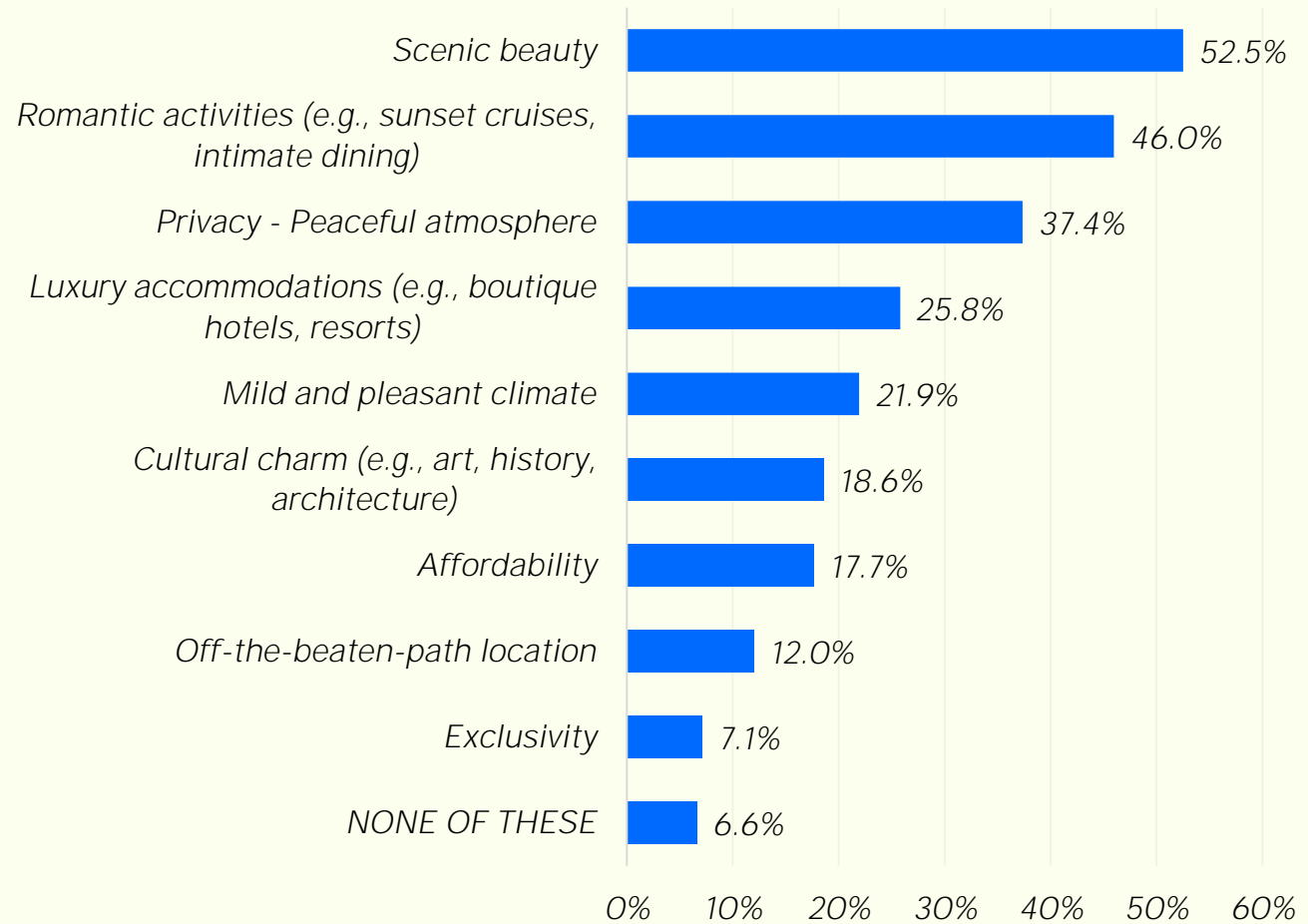


# What Makes a Place Romantic?

# Travelers see scenic beauty and romantic activities as key to having a romantic vibe.

Question:

*Which of these factors contribute the most to a destination feeling romantic?*



# What Makes a Place Romantic?

**“Romance in travel is about navigating both the beautiful and the challenging moments together. It’s about discovering new places but also learning to communicate and grow stronger as a team even when things don’t go as planned. The adventure becomes even more meaningful when you face it side by side.”**

--Alieria, Austin Texas



# What Makes a Place Romantic?

**“Travel can be romantic because the setting can be everything. Its the inclusion of a special dinner with a breathtaking view in the background. Its holding hands as you both experience something that you collectively dreamed of, but also, its even romance when you think of the future that you can experience with someone special when you bring them back to this magical location.”**

--Peter, San Francisco, California

# What Makes a Place Romantic?

**“When it comes to travel, romance transcends the typical** gestures of affection and becomes an exploration of **connection, discovery and intimacy. It’s about sharing a** journey with someone special where each destination becomes a canvas for meaningful moments and shared **adventures. It’s the quiet moments; the shared laughter as** you get lost in unfamiliar streets, the comfort of holding hands while watching the world go by or the excitement of **trying new cuisines together.”**

--William, Orlando, Florida

# What Makes a Place Romantic?

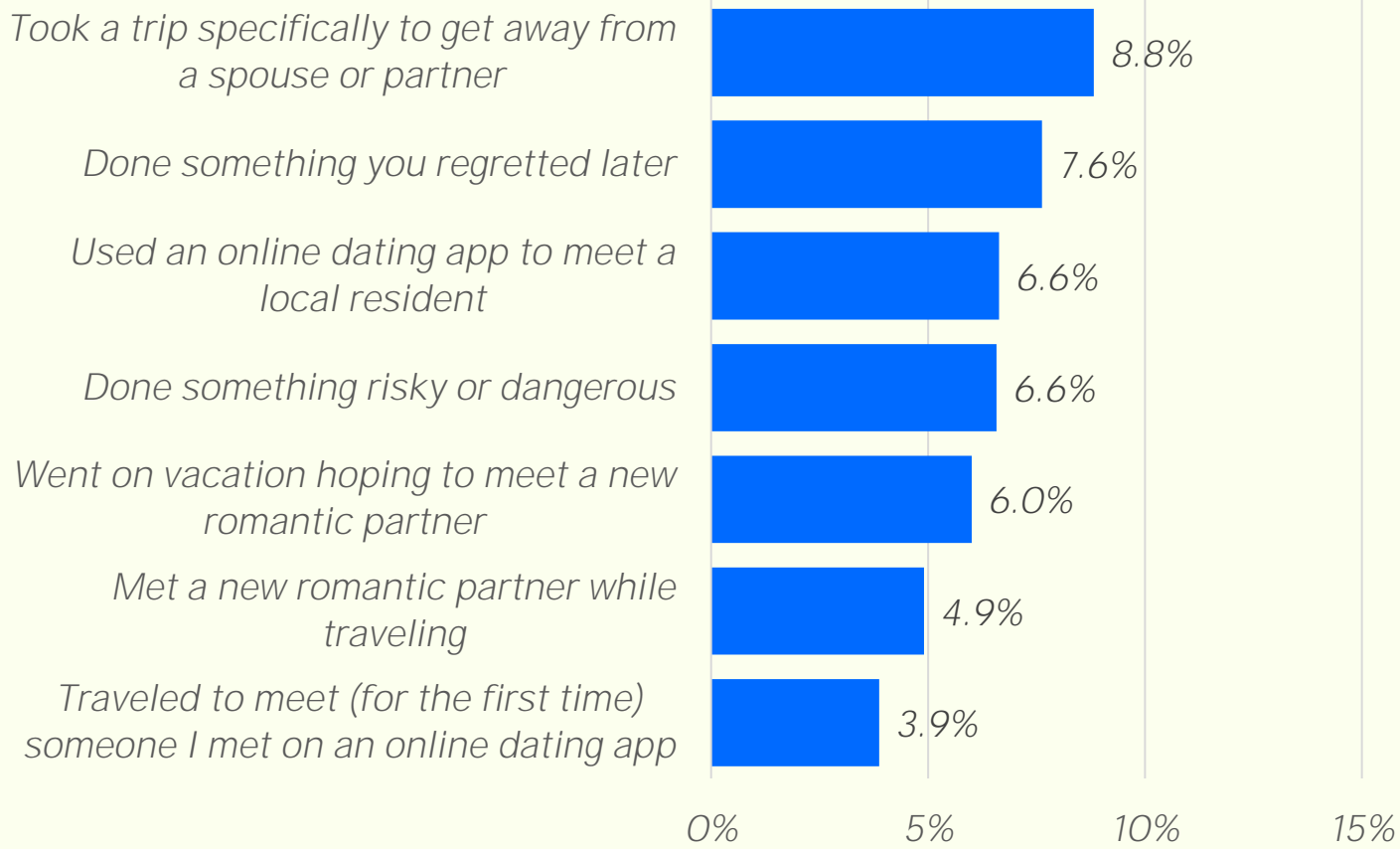
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Almost 1-in-10 travelers have traveled to get away from a spouse or partner, while 1-in-20 have used a dating app to connect with a local resident.

Question:

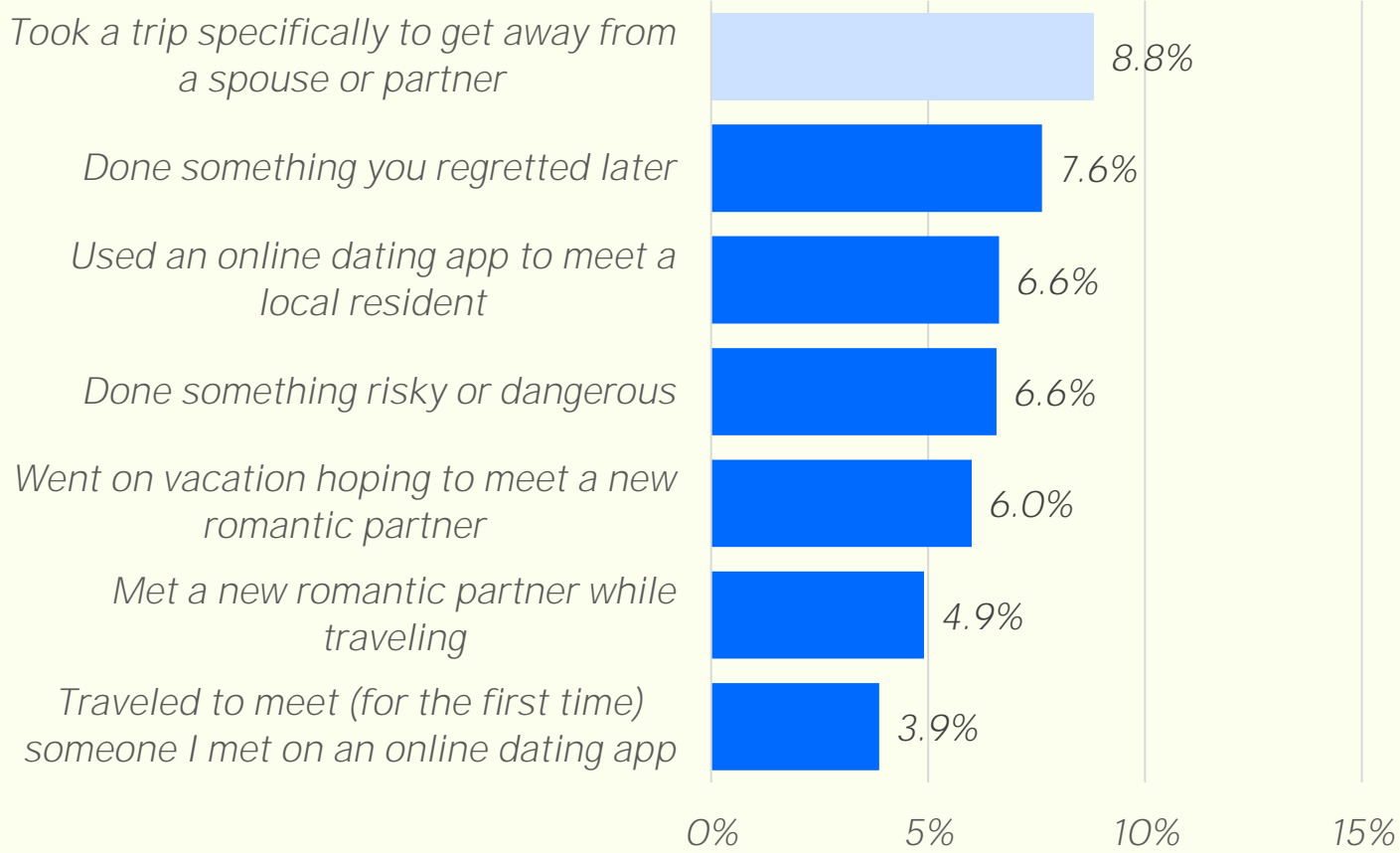
Please tell us if you have done/experienced any of these in the PAST TWELVE (12) MONTHS while traveling?



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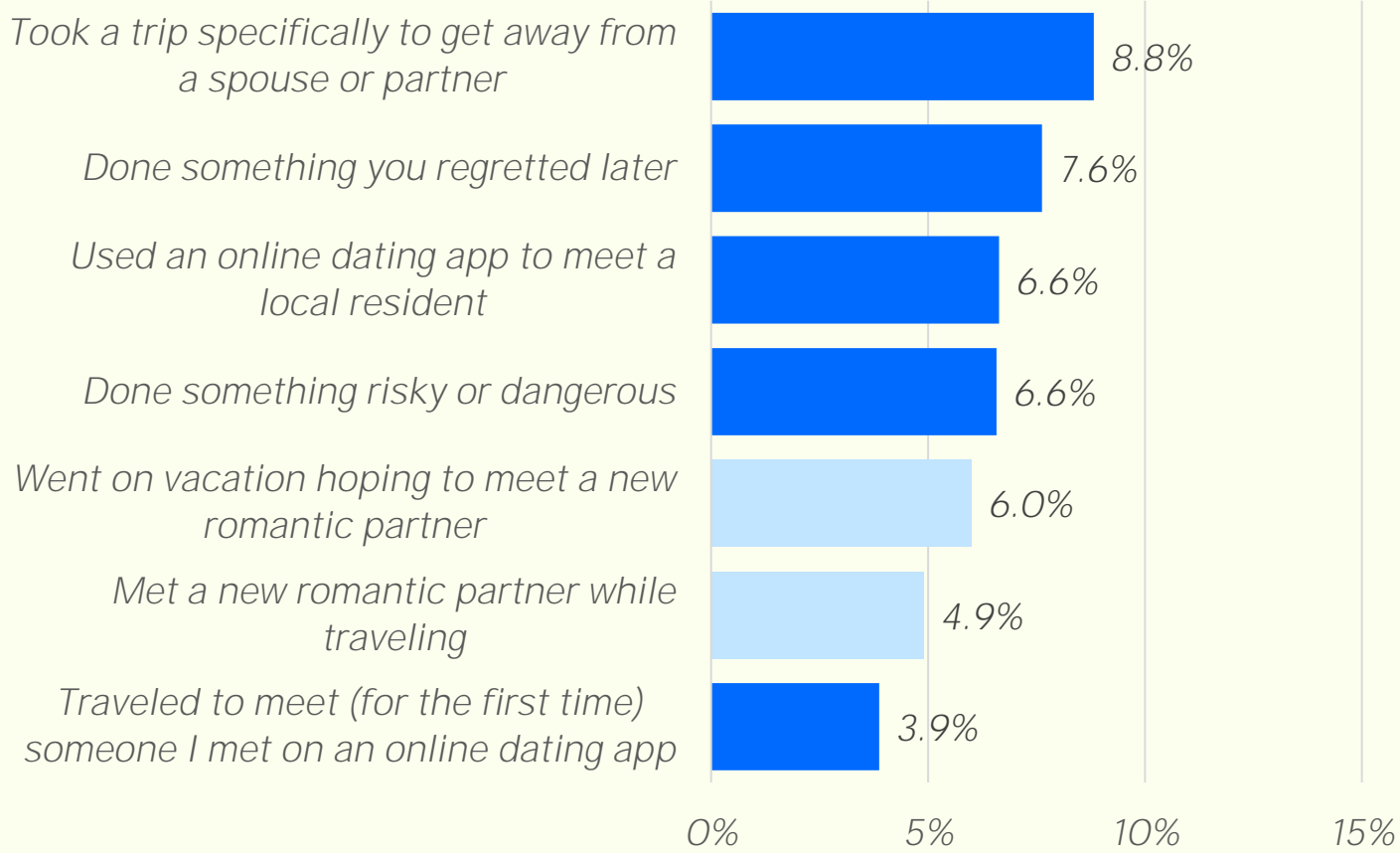
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Please tell us if you have done/experienced any of these in the PAST TWELVE (12) MONTHS while traveling?



Among travelers who went on vacation looking for a new romantic partner:

SUCCESS  
RATE

21.5%

(Met a new romantic partner)

# Thoughts on the landscape of travel & human connection:

- American travelers report a high-degree of satisfaction with their personal relationships.
- We highly value travel as a way to build relationships not only with our travel companions, but also with friends back home and local residents.
- The social aspects of travel contribute heavily to overall travel satisfaction.
- Our social circles impact where we travel, but this is most important to younger travelers.
- Romance matters--but to a lesser degree. Understanding it with surveys is a challenge; as it is a deeply complicated and nuanced thing.



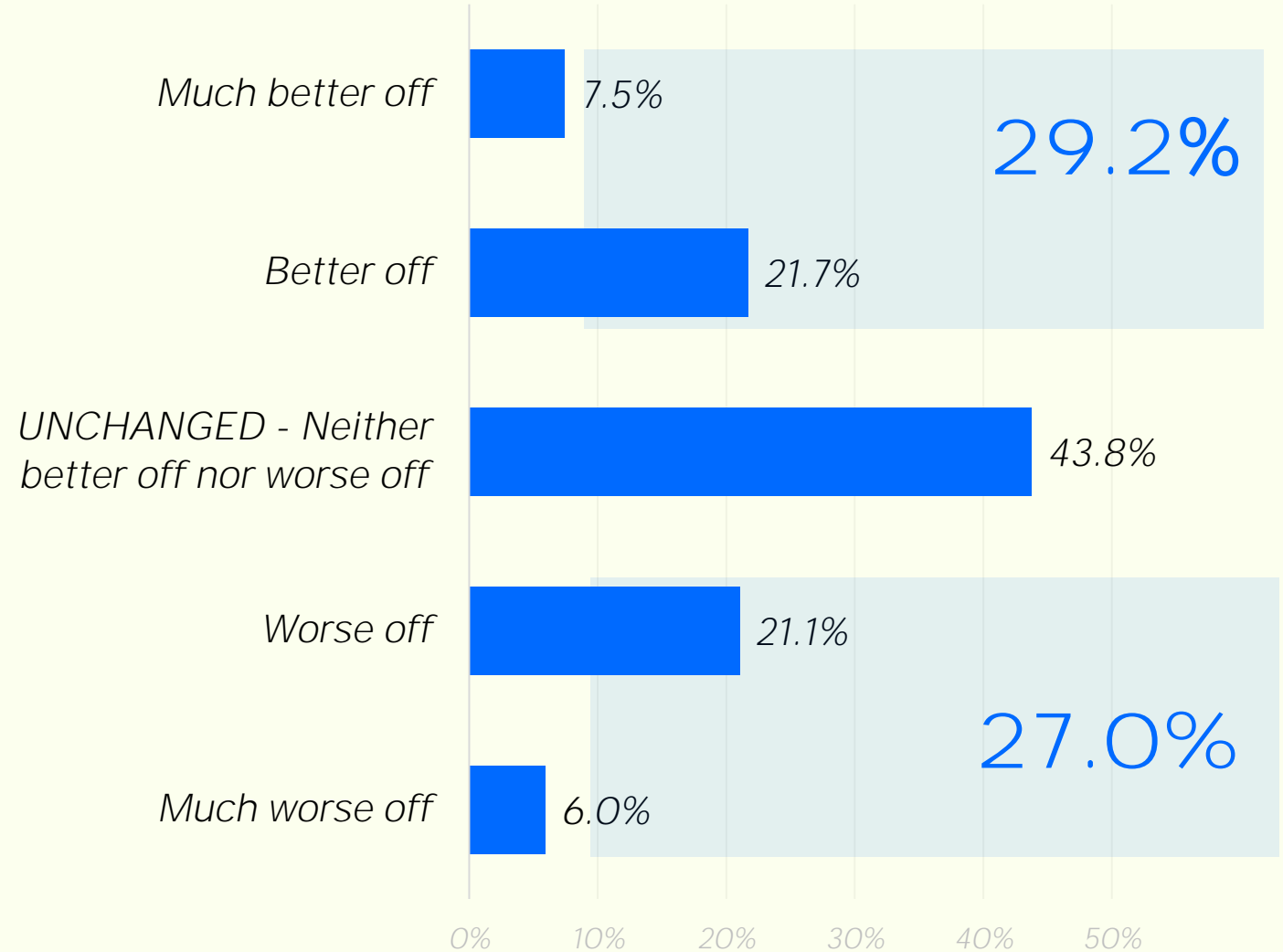
A man with a beard and sunglasses, wearing a dark jacket over a black shirt, stands on a city street. He is holding a white coffee cup in his right hand. The background shows a blurred city scene with buildings and cars. The text "Traveler Sentiment" is overlaid on the right side of the image.

# Traveler Sentiment

# Travelers' Financial Confidence Slips Slightly This Month

Question:

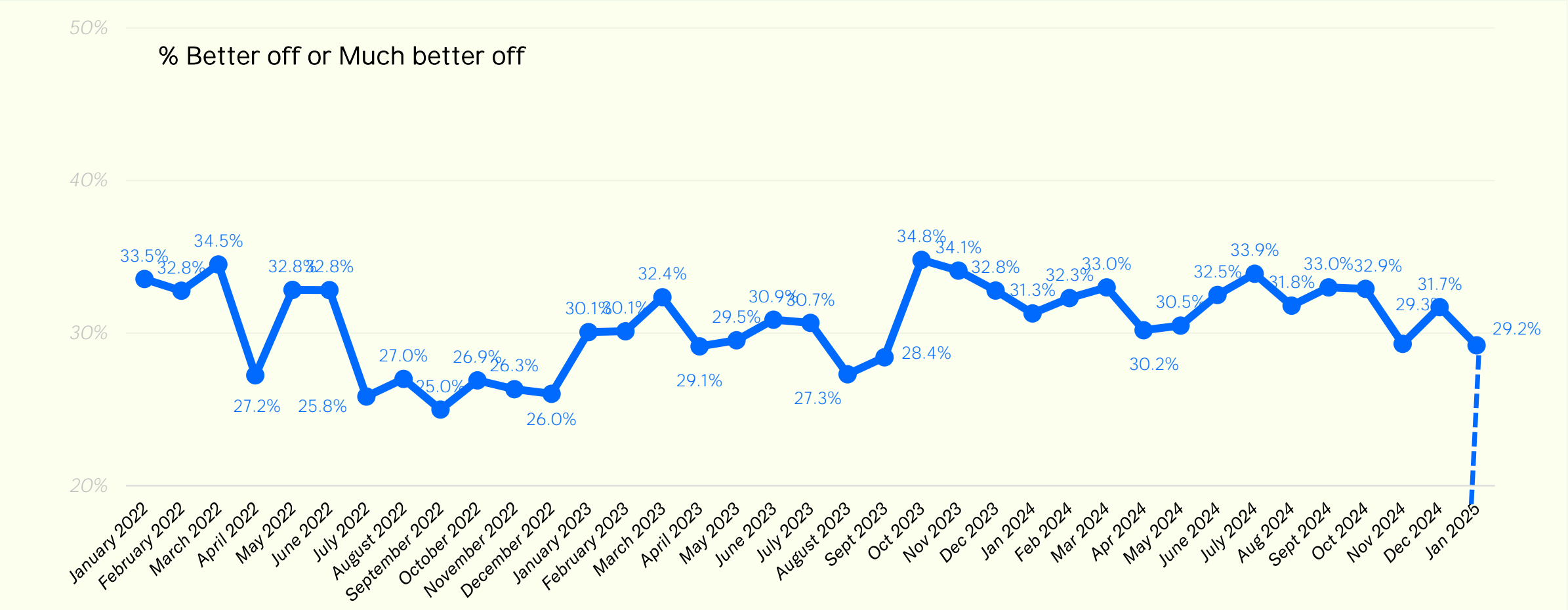
*Would you say that you (and your household) are better off or worse off financially than you were a year ago?*



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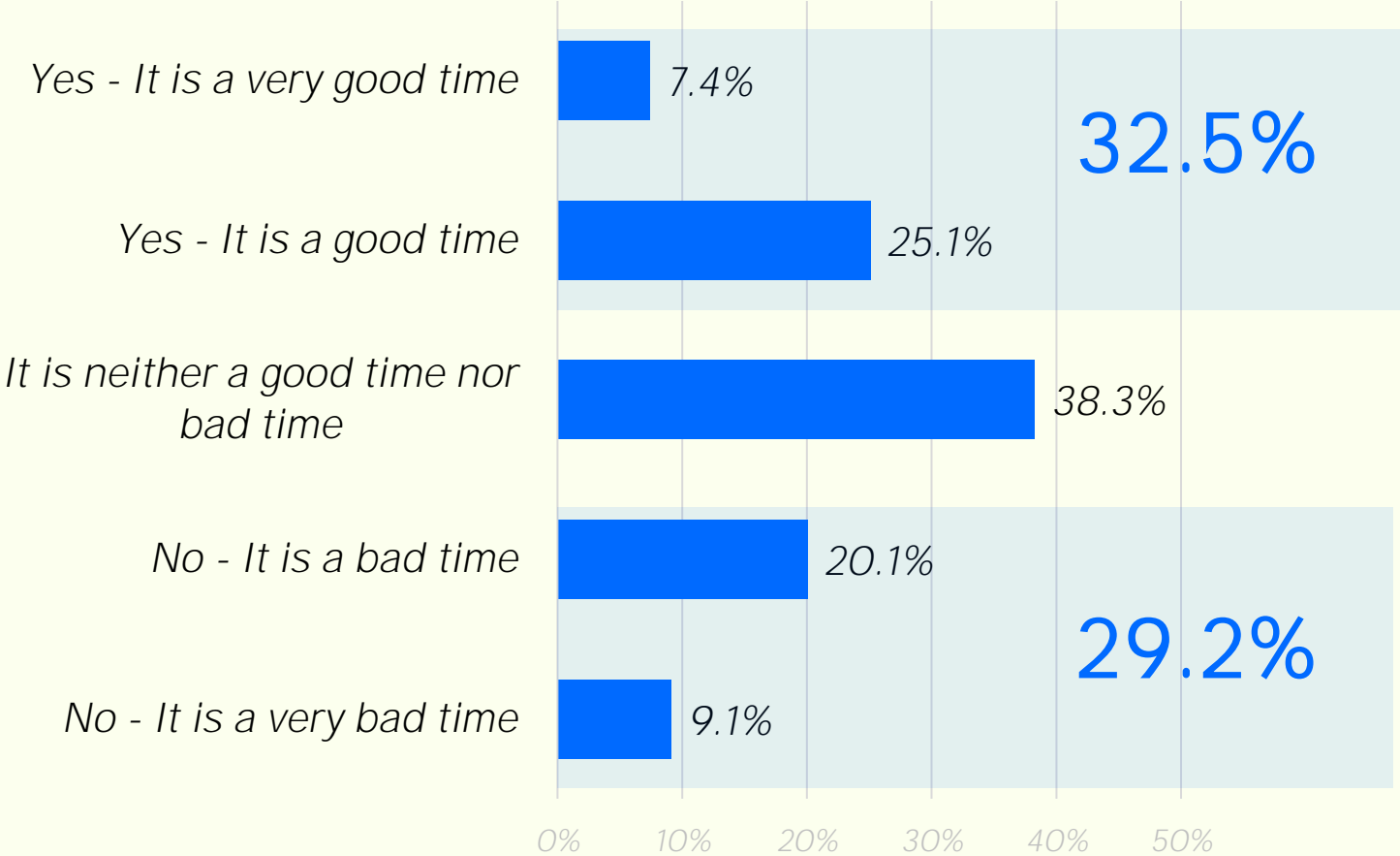
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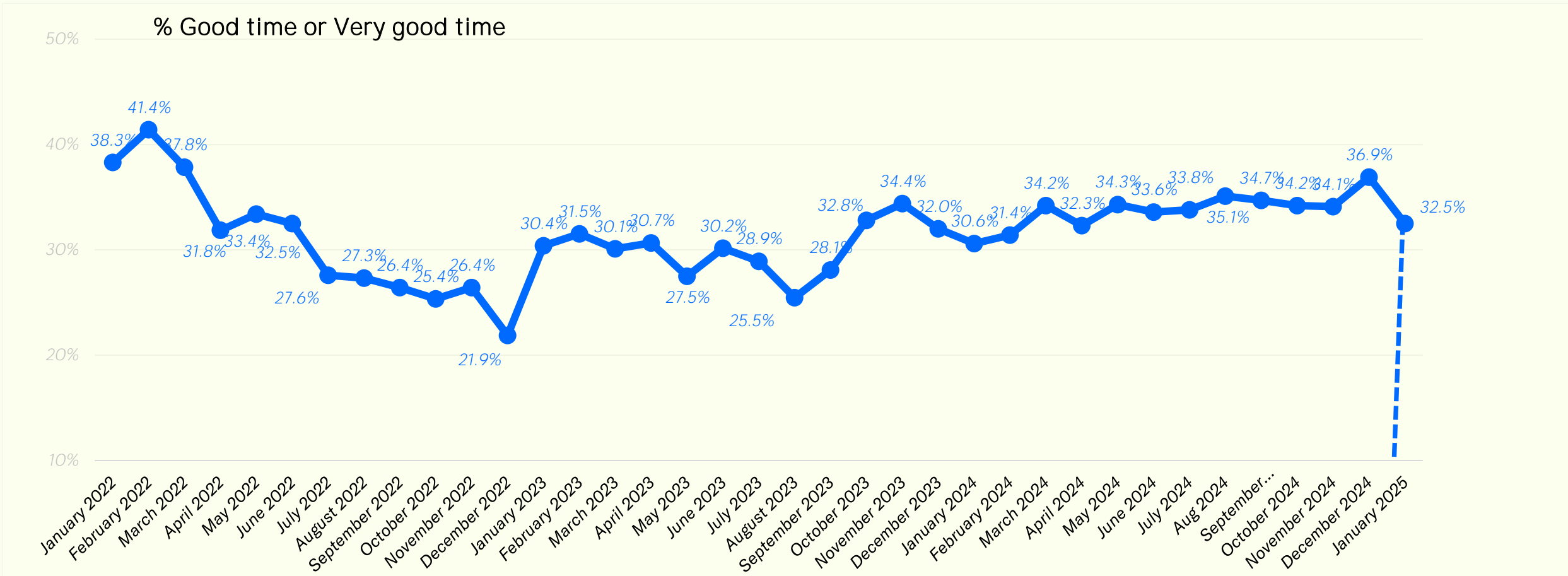
# One-Third of Travelers Are Confident Now is a Good Time to Spend on Leisure Travel

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?*



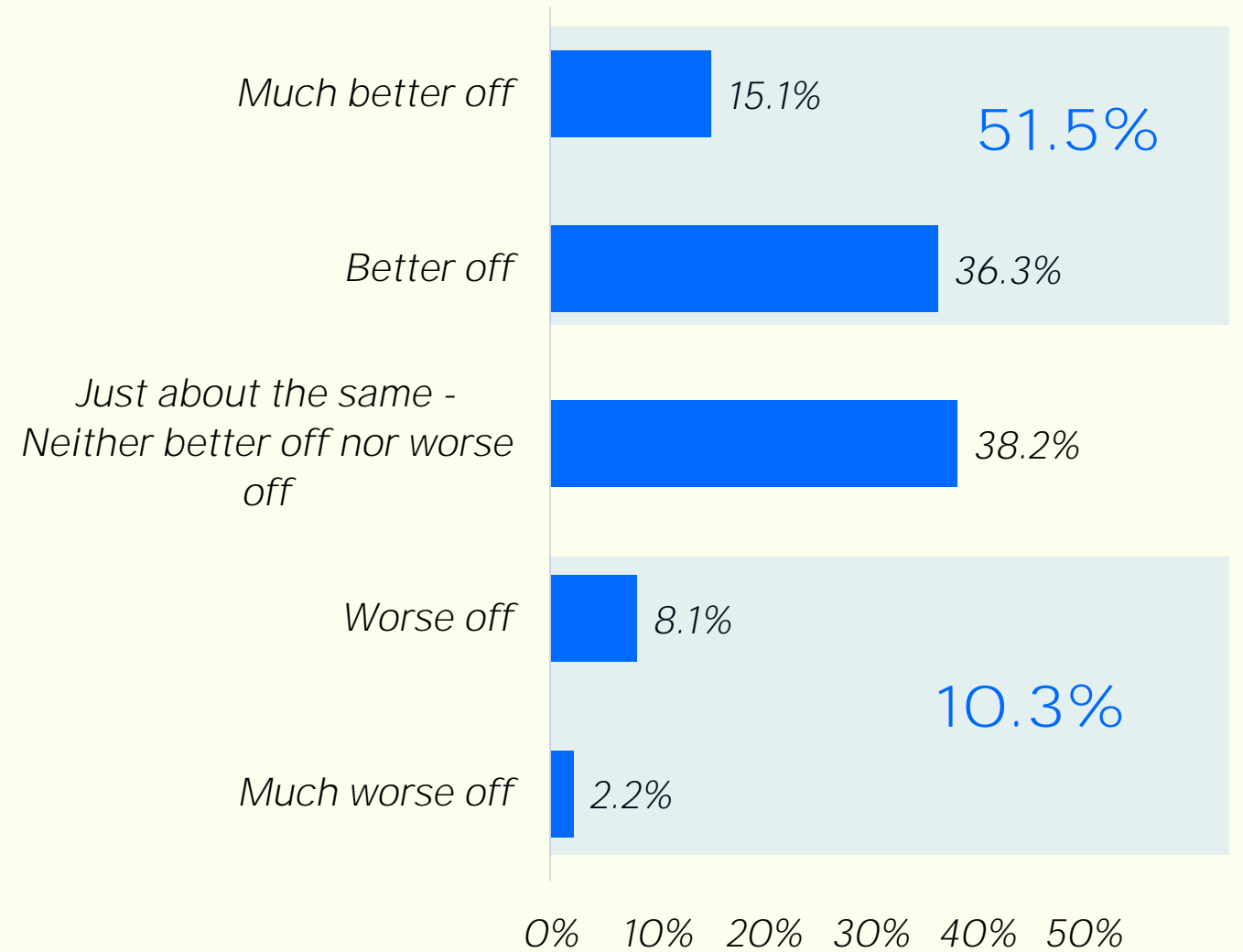
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# Travelers Remain Largely Positive on Their Financial Outlooks

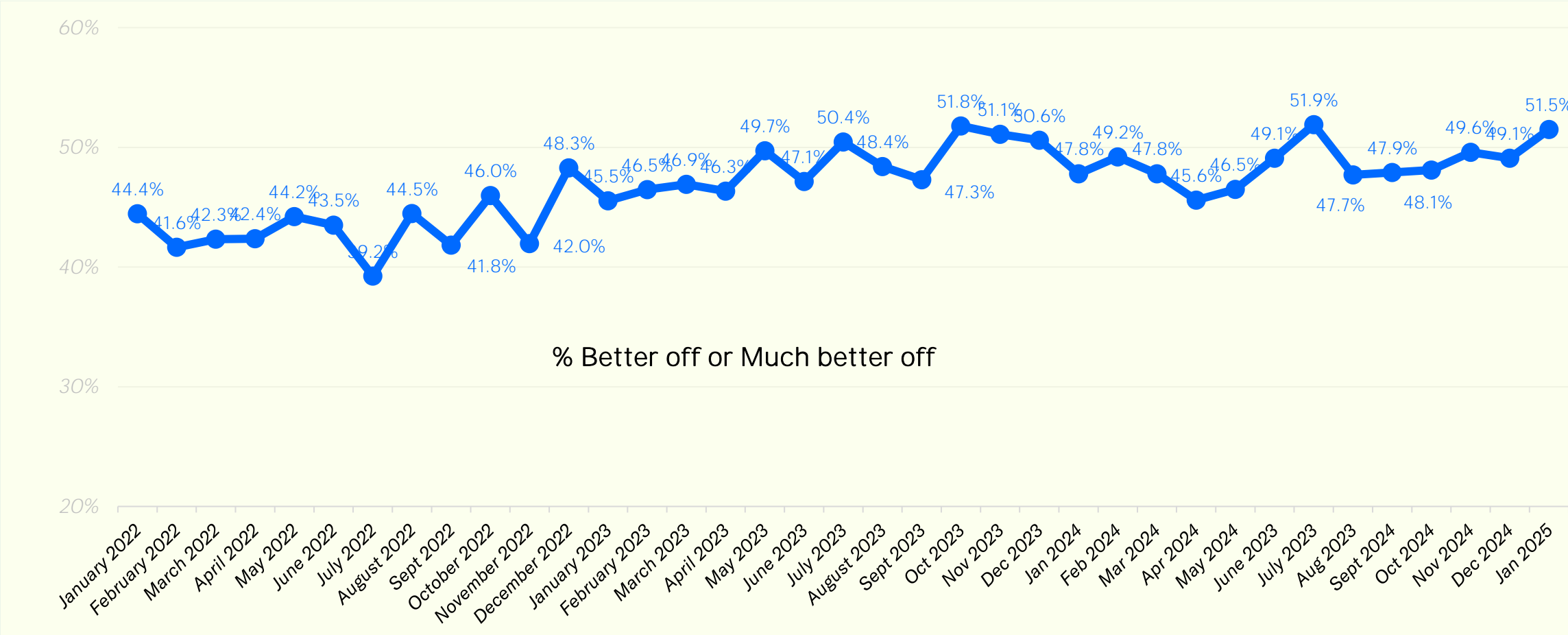
## Question:

*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?*



# Travelers Remain Largely Positive on Their Financial Outlooks

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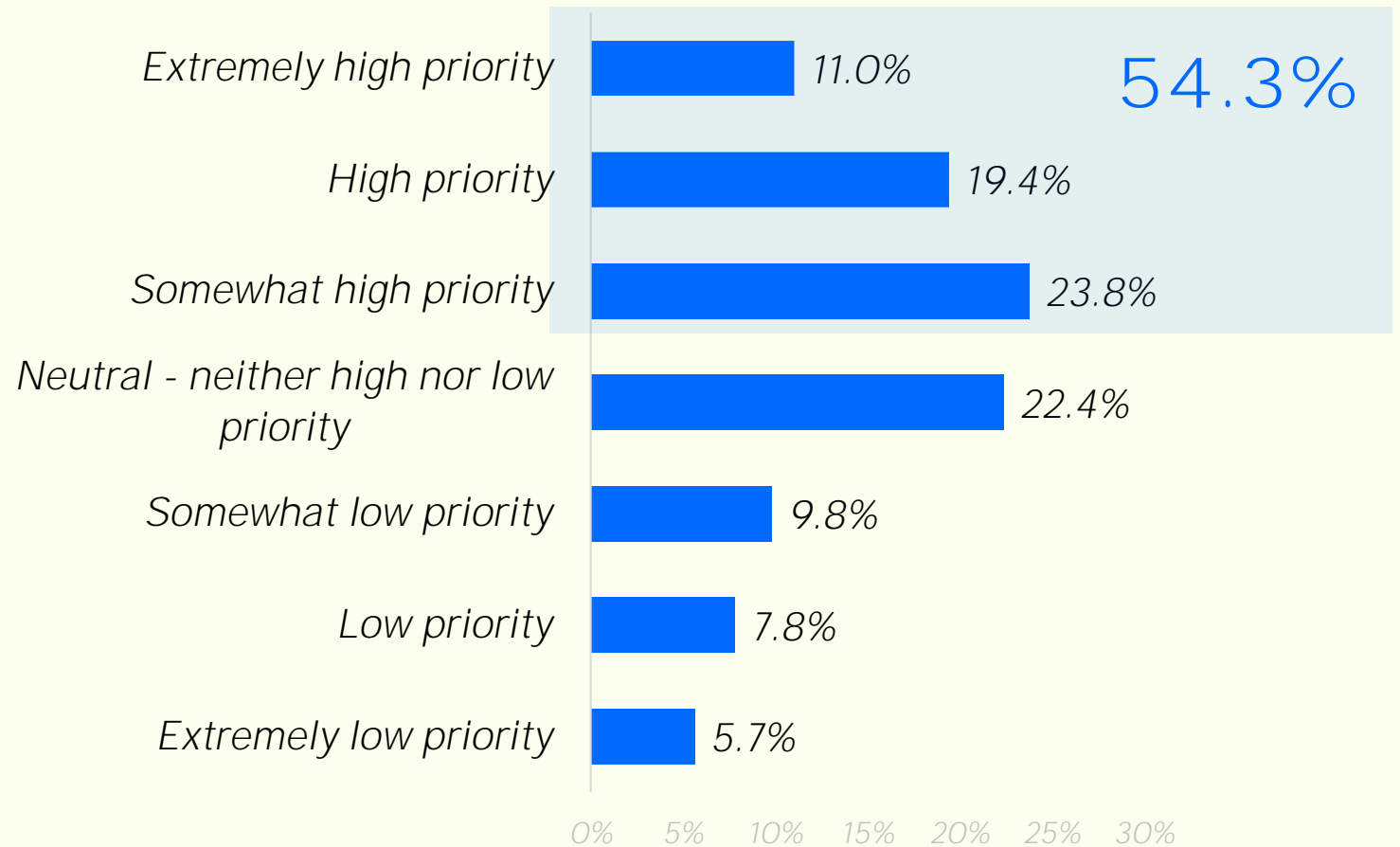


# Fewer Travelers are Set to Make Leisure Travel a Key Spending Focus.

## 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) \_\_\_\_\_.

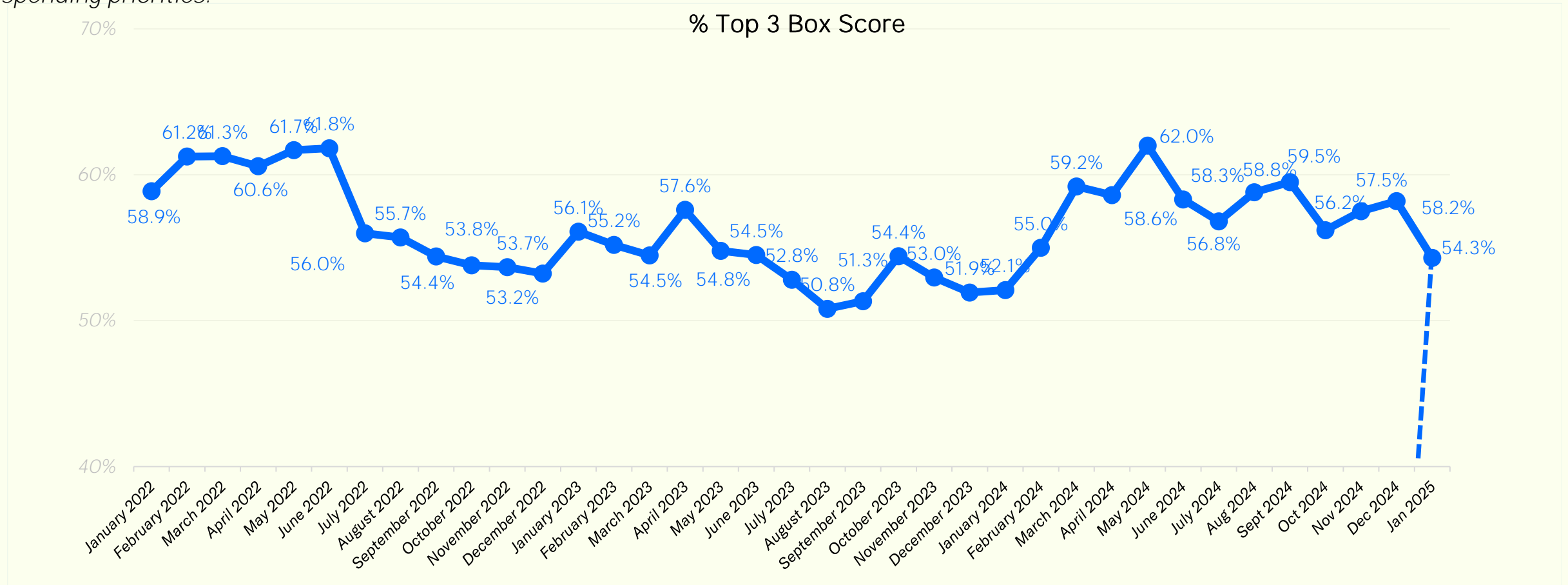




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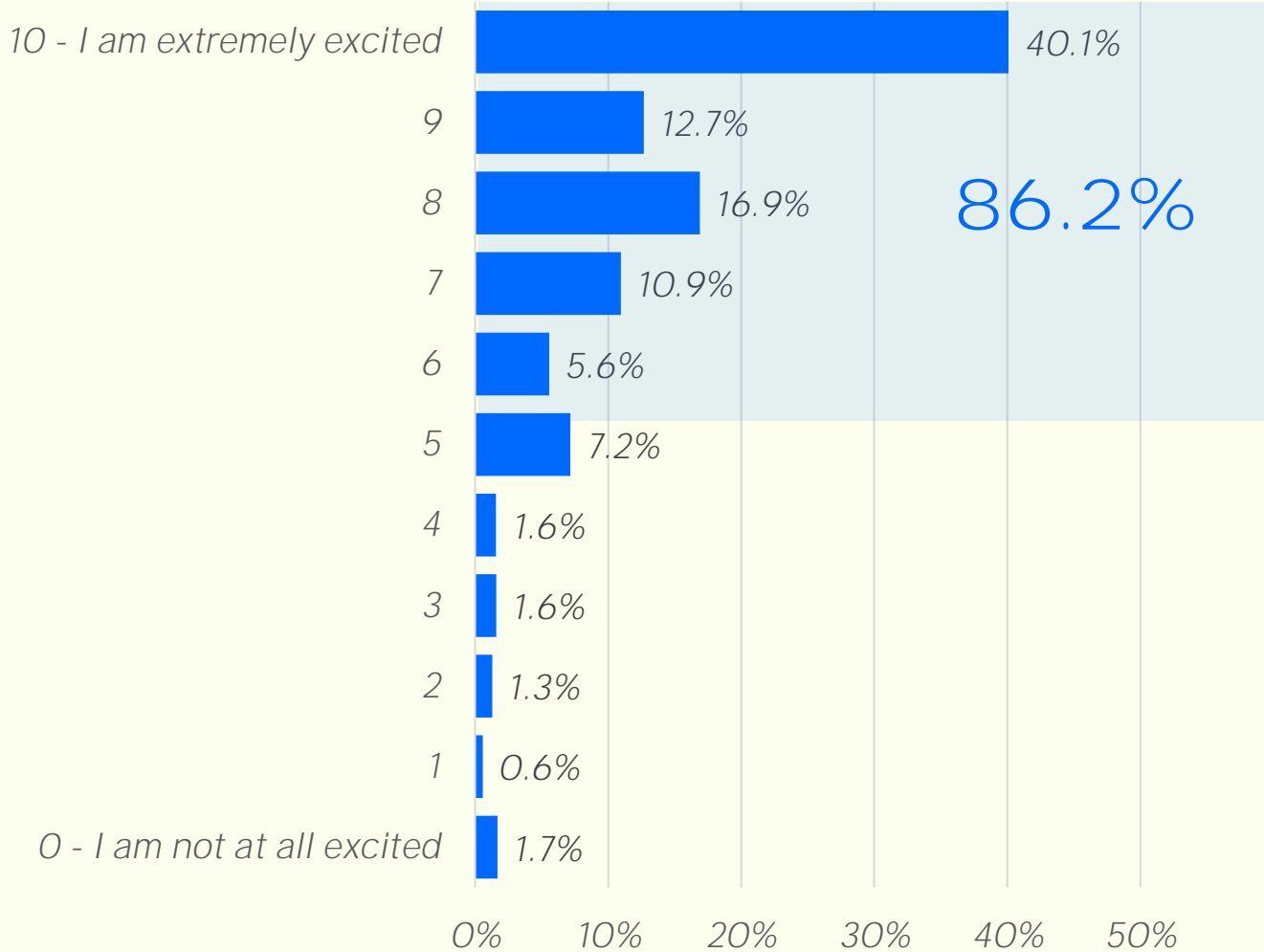
*Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.*



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

Question:

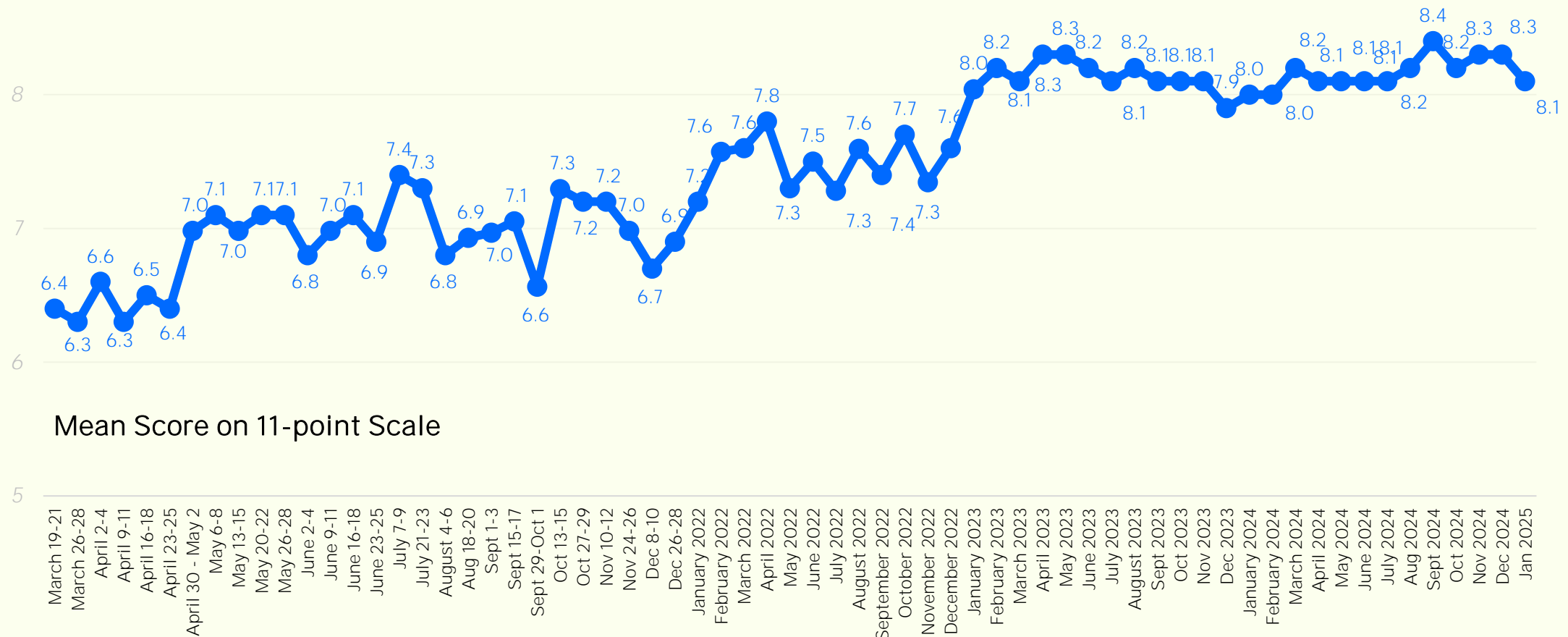
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



# Excitement for Leisure Travel Dipped this Month.

Question:

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

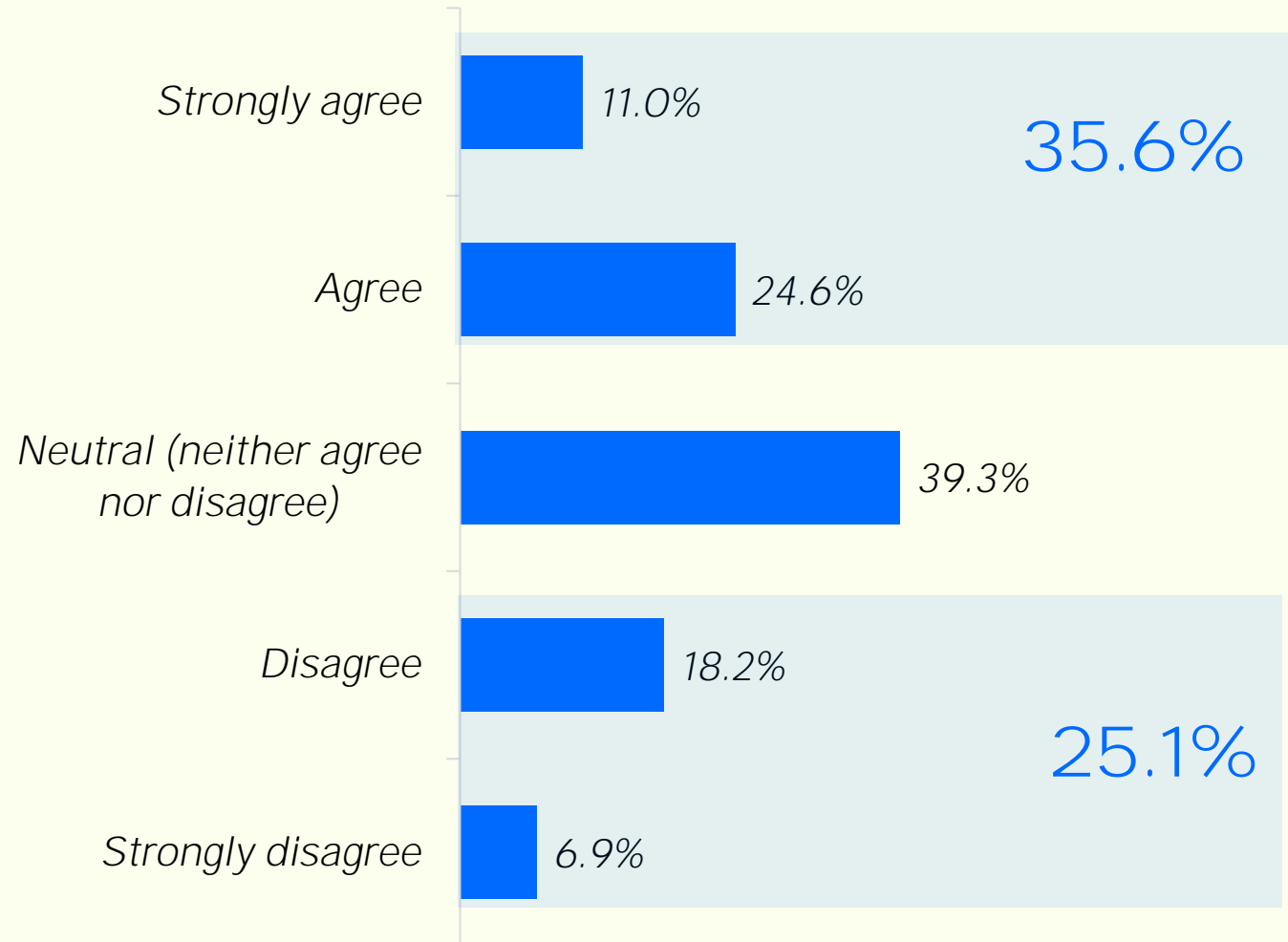


Mean Score on 11-point Scale

# Recession Fears Hold Steady, with Only One-Third of Travelers Expecting an Impending Downturn

Question:

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

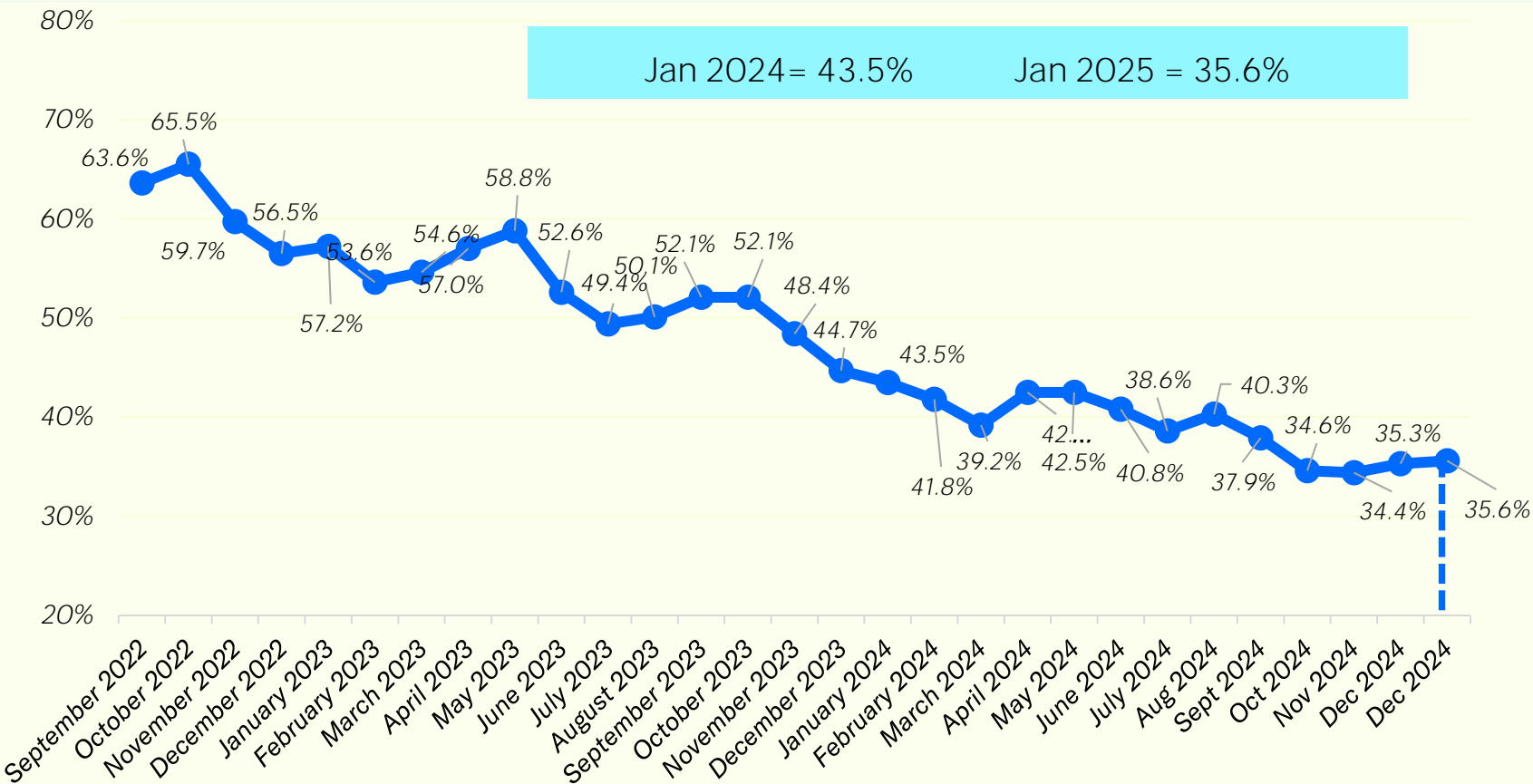


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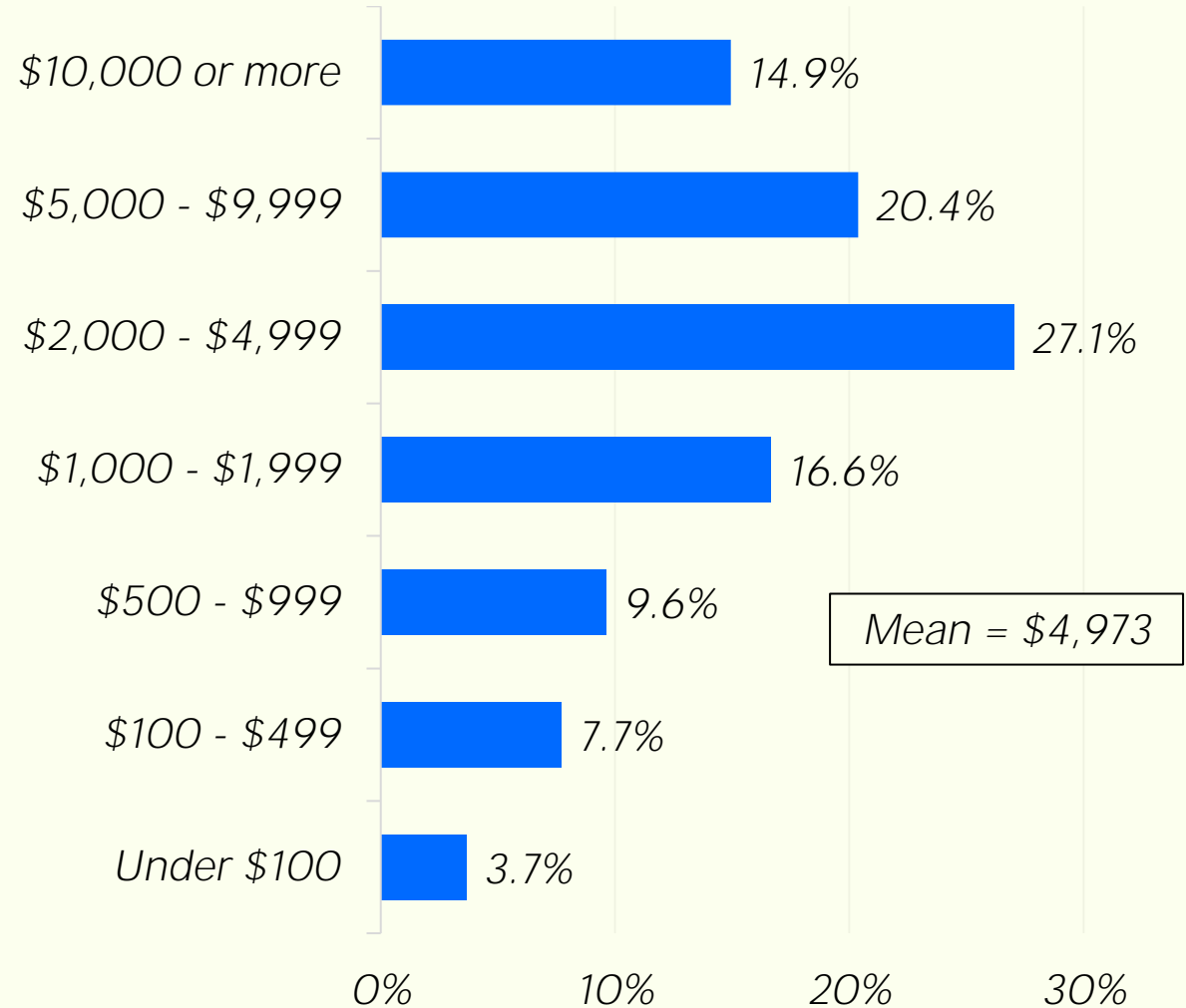
% Agree or Strongly agree



# Expected Travel Budgets Weakened This Month.

## 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?*



# Expected Travel Budgets Weakened This Month.

## Question:

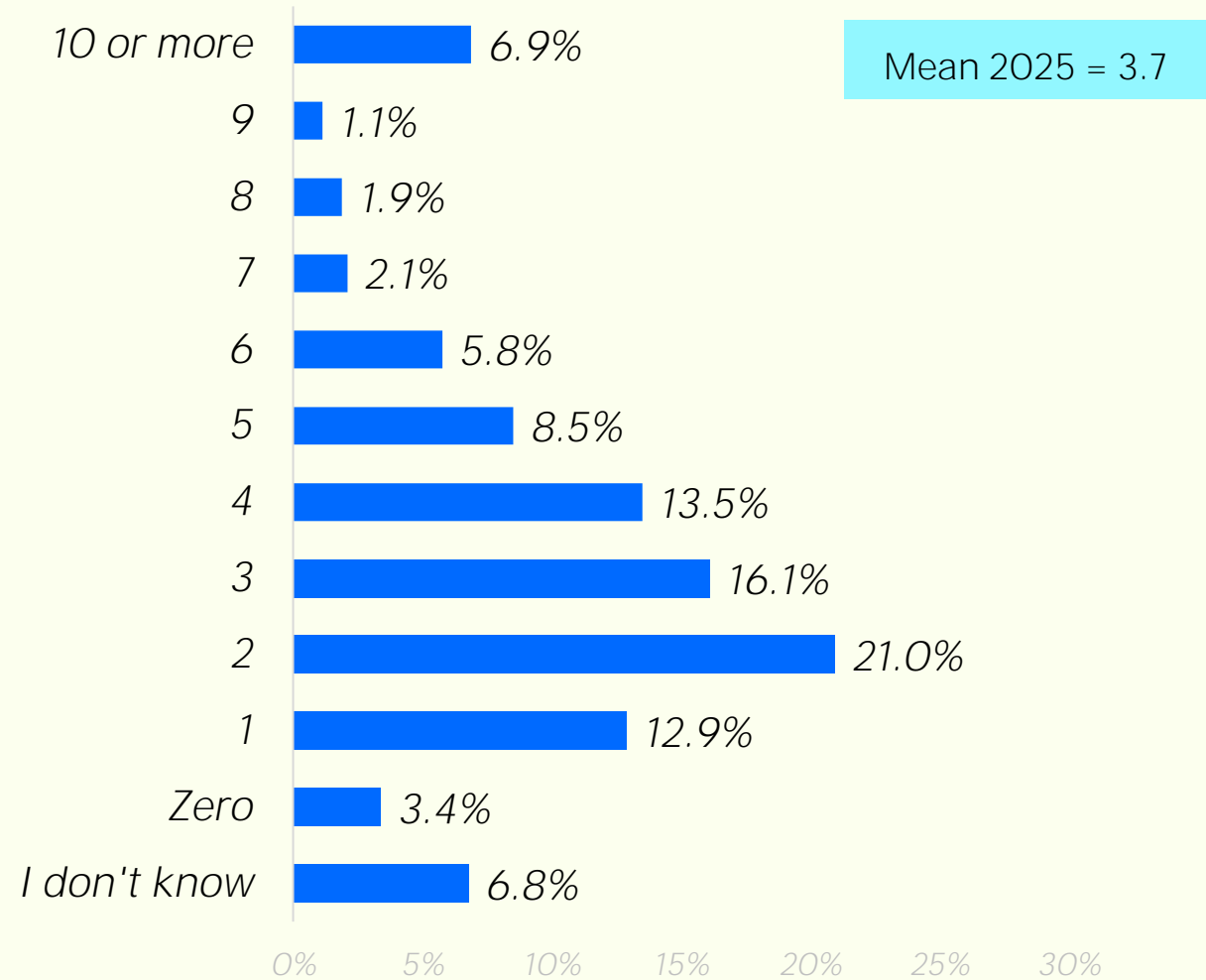
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



# U.S. Travelers Cut Back on Planned Trips This Month

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?*

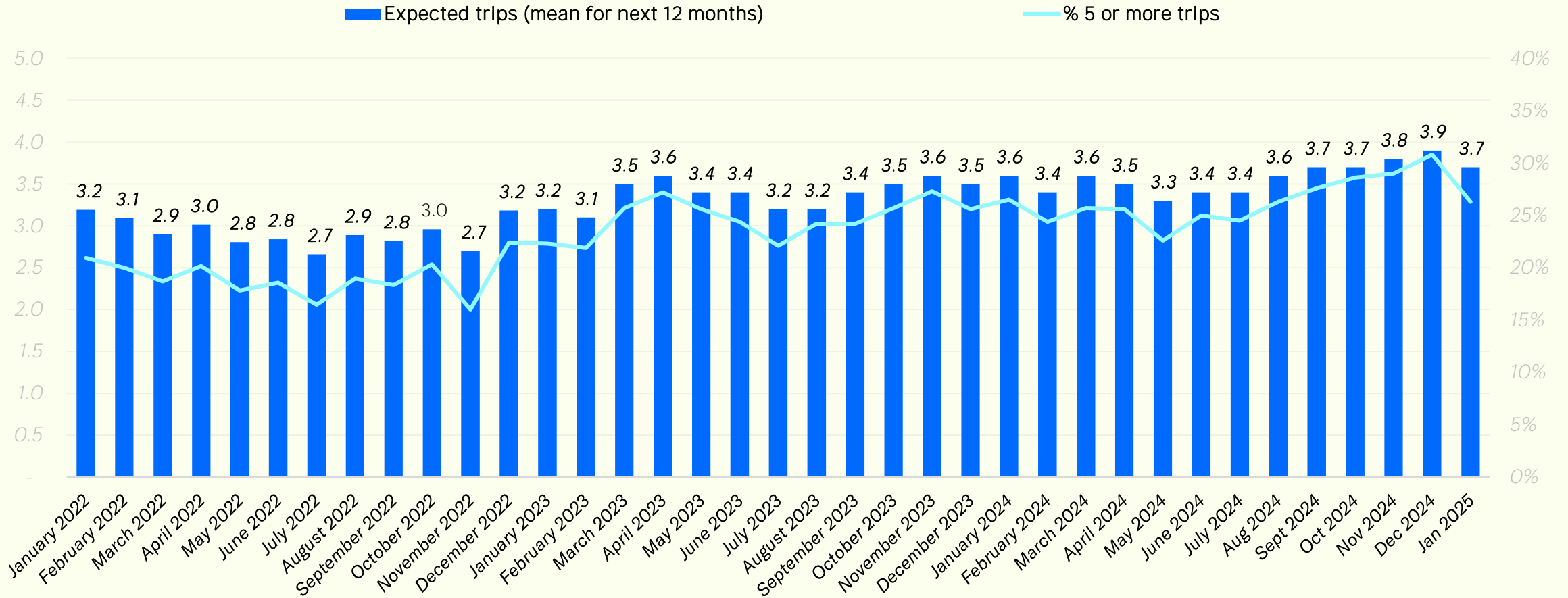




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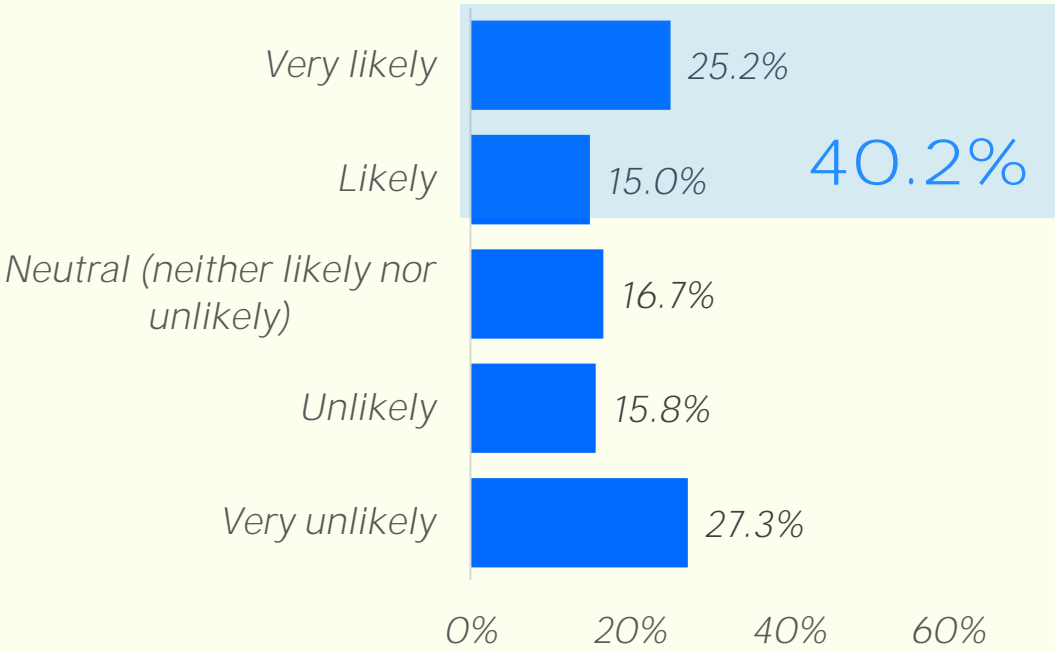
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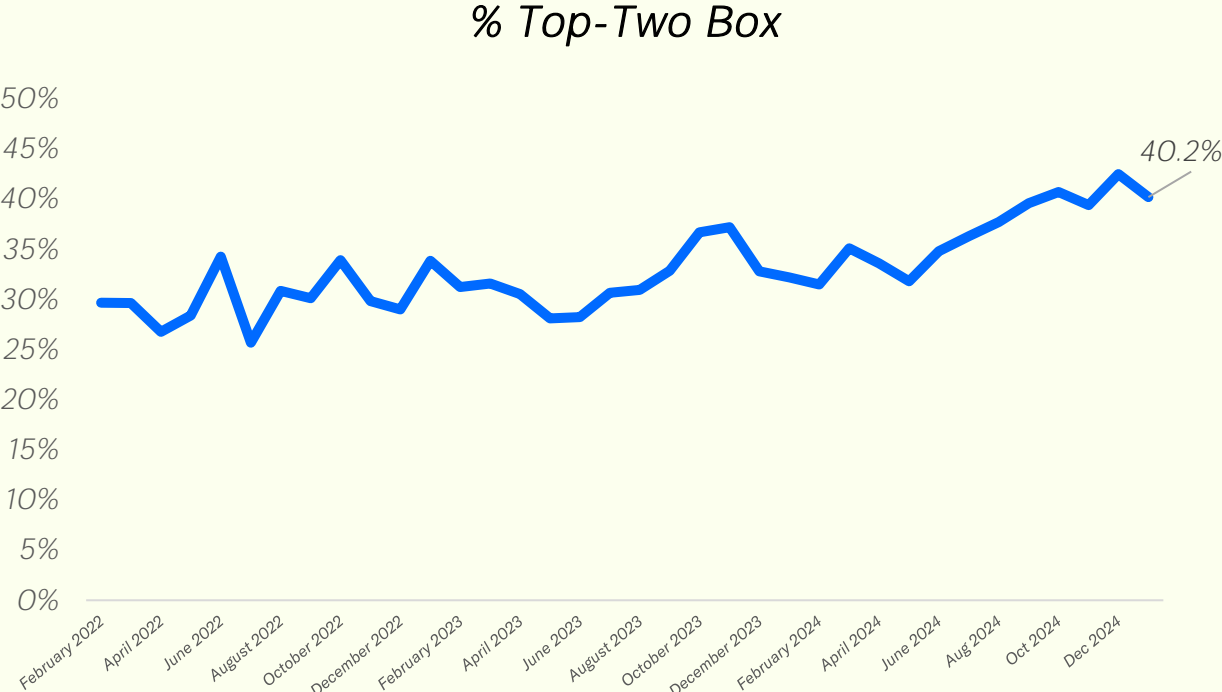


# Anticipated International Travel Drops for the Coming Year

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



**Historical data**



# **We see mixed messages in this month's data.**

Current travel sentiment moved backward somewhat, while travel optimism remained solid.

- Expected travel budgets declined
- The expected number of future trips dropped
- Excitement to travel remains elevated

*March Livestream  
Registration*



# The State of the International Traveler: Insights to Grow Your Share of International Inbound Visitation

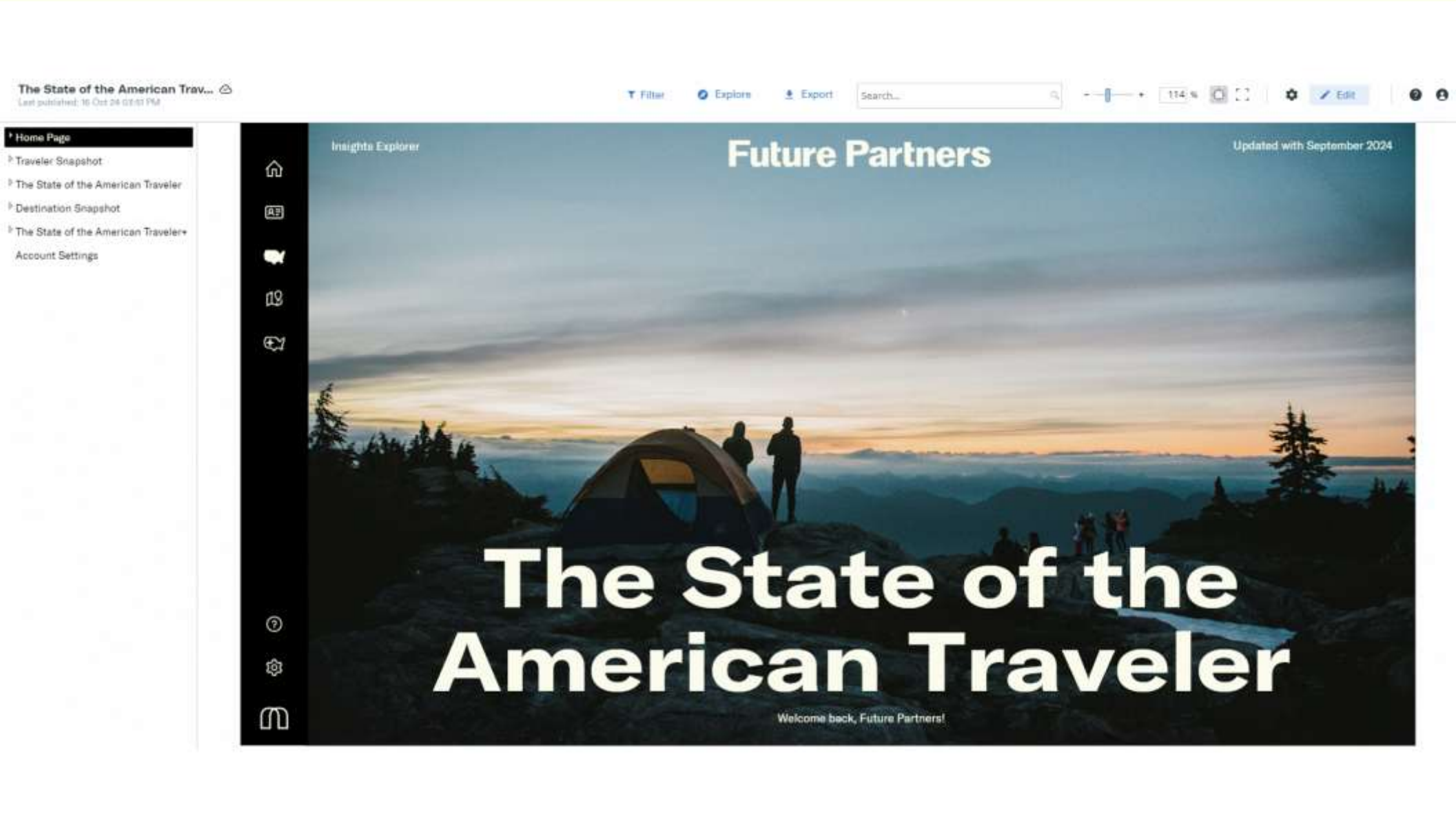
Gain Comprehensive Marketing  
Insight on the Following Countries:

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



For more information reach out to [Jennifer@FuturePartners.com](mailto:Jennifer@FuturePartners.com)

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