

January 2025

Future Partners

The State of the American Traveler

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

Future Partners

Opportunity powered by *Insight*

Future Partners

*Bringing the future of travel
within reach*

Future Partners

Presentation deck and
recording will be available on
FuturePartners.com

*February Livestream
Registration*




Los Angeles



Today



Crowdsourcing the Future

Travel Sentiment Overview

Consumer Panel: Generations



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: [December 15-26](#)*
- *4,000+ fully completed surveys collected each wave*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*



See, Segment, Analyze, Visualize and Learn More When You Subscribe to The State of the American Traveler Insights Explorer

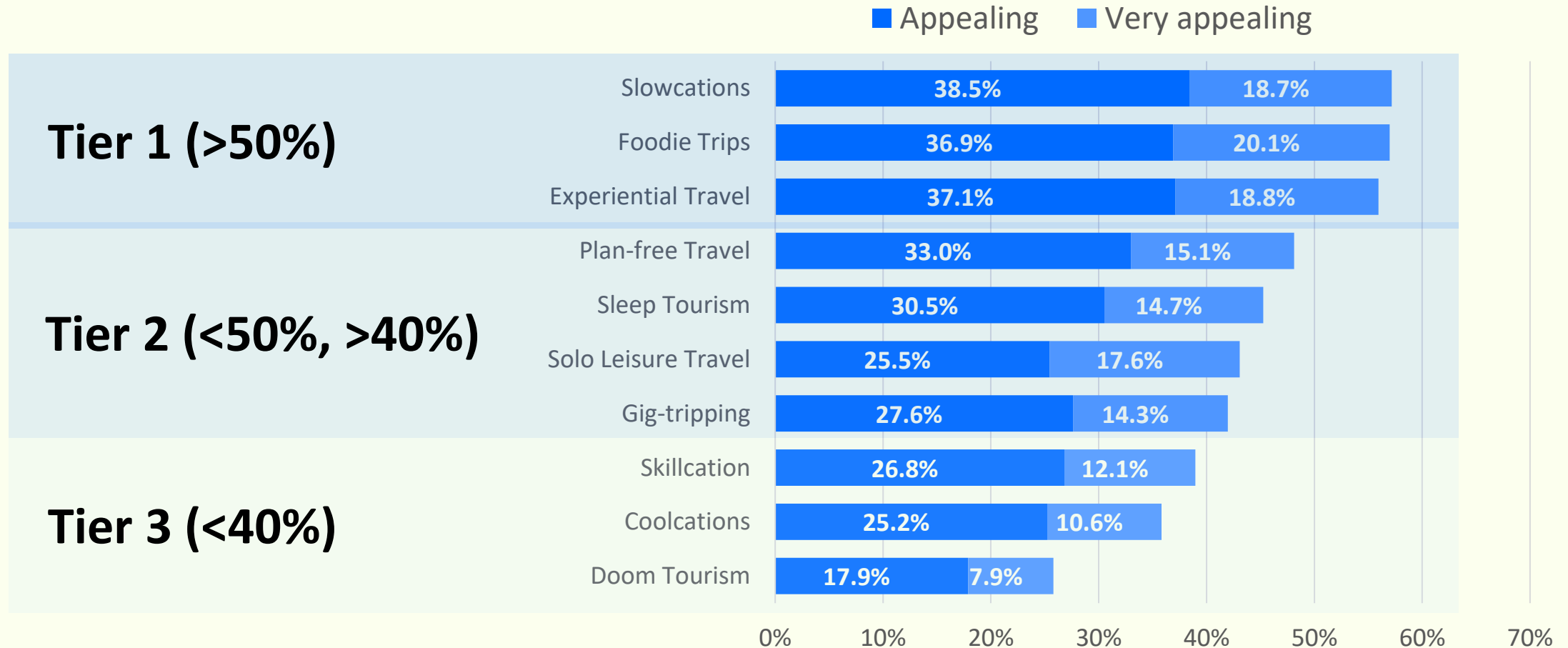
The screenshot displays the 'The State of the American Traveler' Insights Explorer dashboard. The top navigation bar includes the title 'The State of the American Trav...' with a cloud icon, a 'Last published: 16 Oct 24 02:03 PM' timestamp, and action buttons for 'Filter', 'Explore', 'Export', and a search bar. On the left, a sidebar menu lists 'Home Page', 'Traveler Snapshot', 'The State of the American Traveler', 'Destination Snapshot', 'The State of the American Traveler', and 'Account Settings'. The main content area features a large hero image of a tent on a mountain peak at sunset. Overlaid on this image is the text 'Future Partners' in the top right, 'Updated with September 2024' in the top right corner, and 'The State of the American Traveler' in large white font in the center. At the bottom of the hero image, it says 'Welcome back, Future Partners!'. A vertical toolbar on the left side of the main area contains icons for home, list, map, chat, calendar, and other functions.



Emerging Trends Shaping Travel in 2025

Future Partners

In terms of mass appeal, slowcations, foodie trips and experiential travel top the latest trends



Travel Nostradamus



Crowdsourcing Predictions for Travel in 2025

Cost

Stress

Sustainability

Tech

Modern Work

Politics

Optimism

- Certain – 100% chance
- Extremely likely
- Likely
- Neither likely nor unlikely
- Unlikely
- Extremely unlikely
- Impossible – 0% chance



Prediction #1

Cost will remain an extremely significant concern of travelers moving into the new year.



Inflationary pressure on travel costs

Statement:

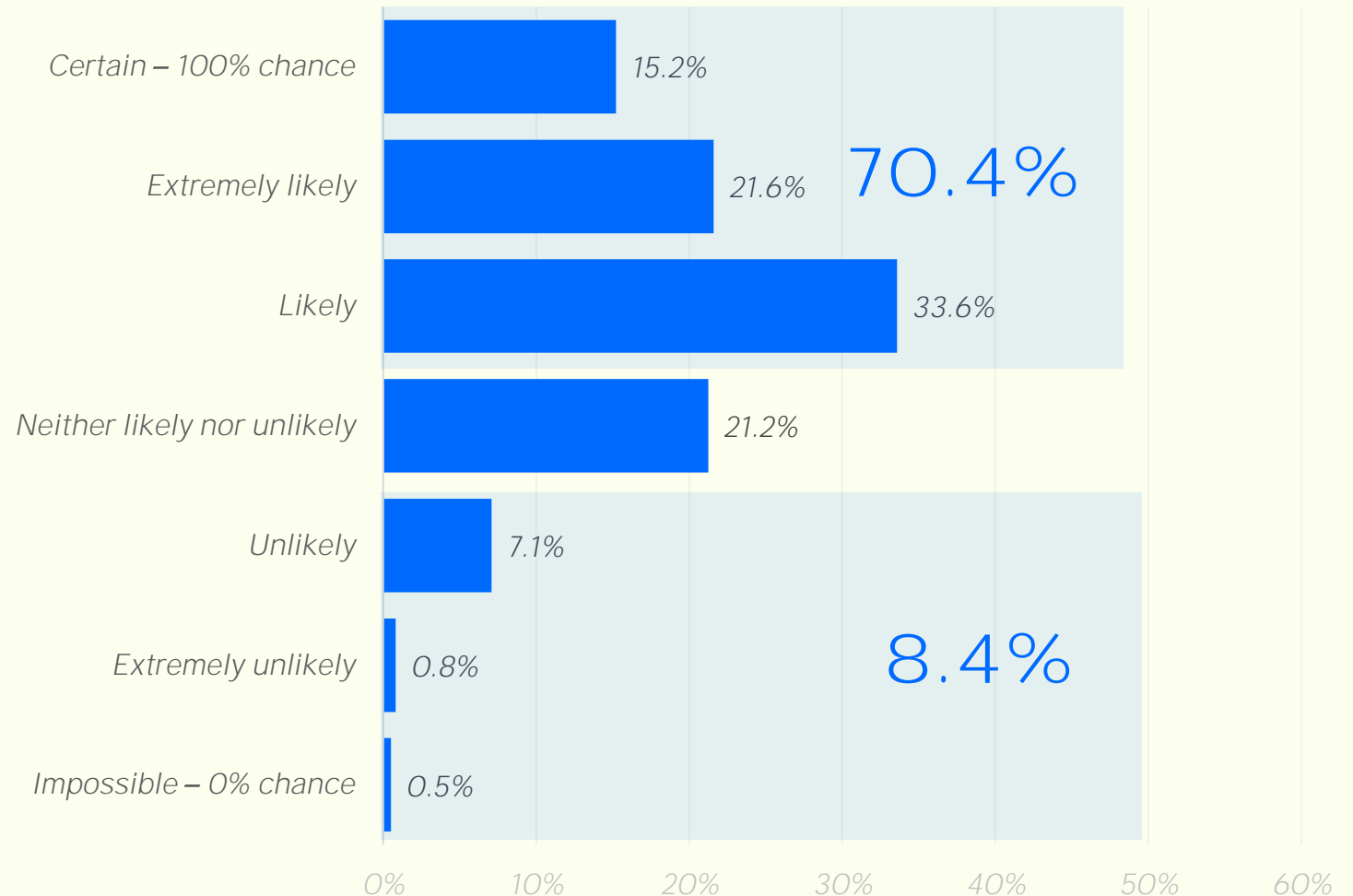
Inflation will drive travel costs up significantly.

Future Partners

As close to unanimity as we get, nearly 3-in-4 travelers expect significant travel cost increase in 2025.

Statement:

Inflation will drive travel costs up significantly.





Budget-friendly destinations

Statement:

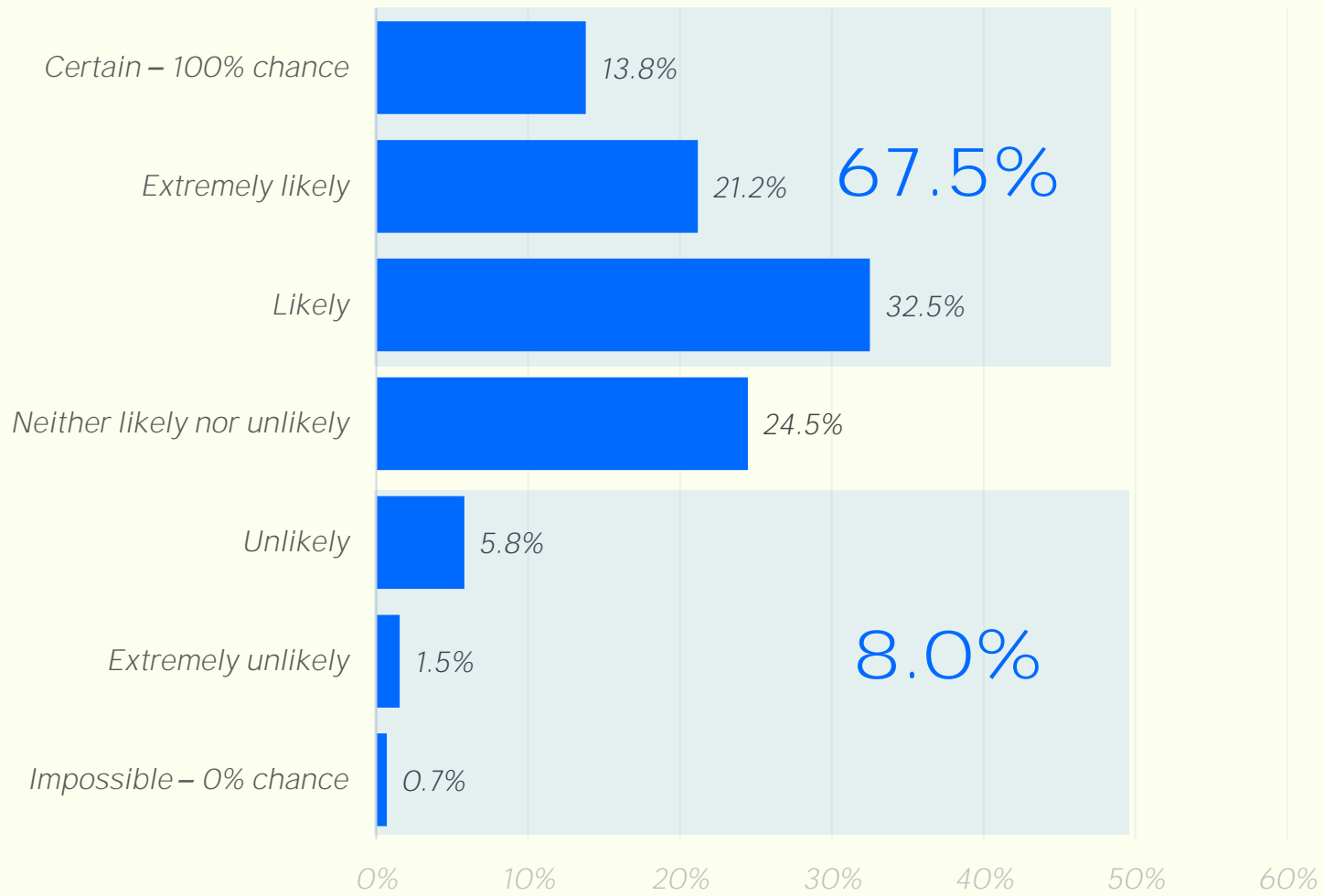
Budget-friendly destinations will become more popular in 2025.

Future Partners

The high cost of travel weighs heavily on travelers' minds, with most seeing budget-friendly travel growing in 2025.

Statement:

Budget-friendly destinations will become more popular in 2025.





The rise of dupes

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2025, visiting dupes will grow in popularity.

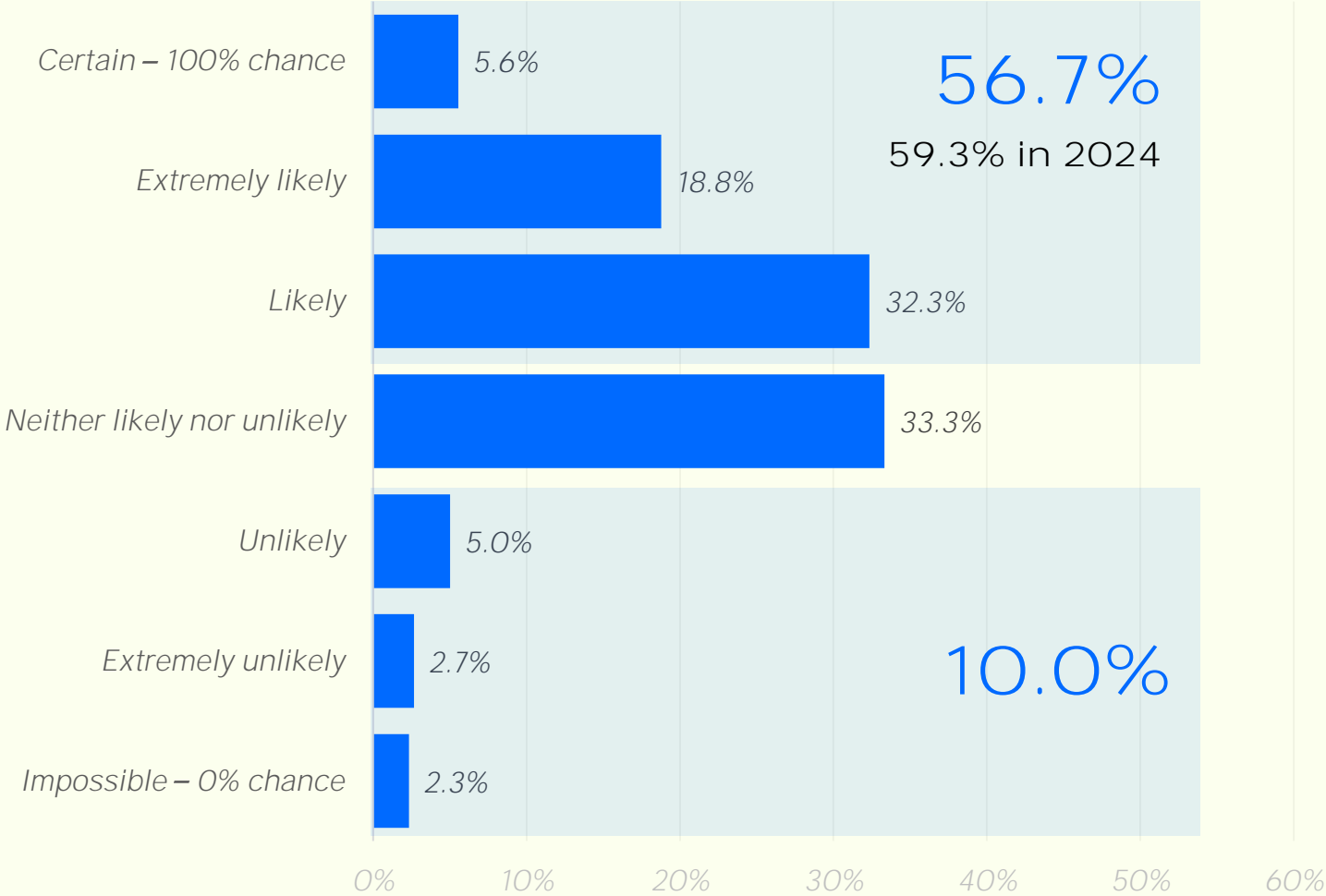
Future Partners

More than half of travelers see dupes as growing in popularity with travelers.

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

In 2025, visiting dupes will grow in popularity.





The increasing popularity of off-the-beaten-path destinations

Statement:

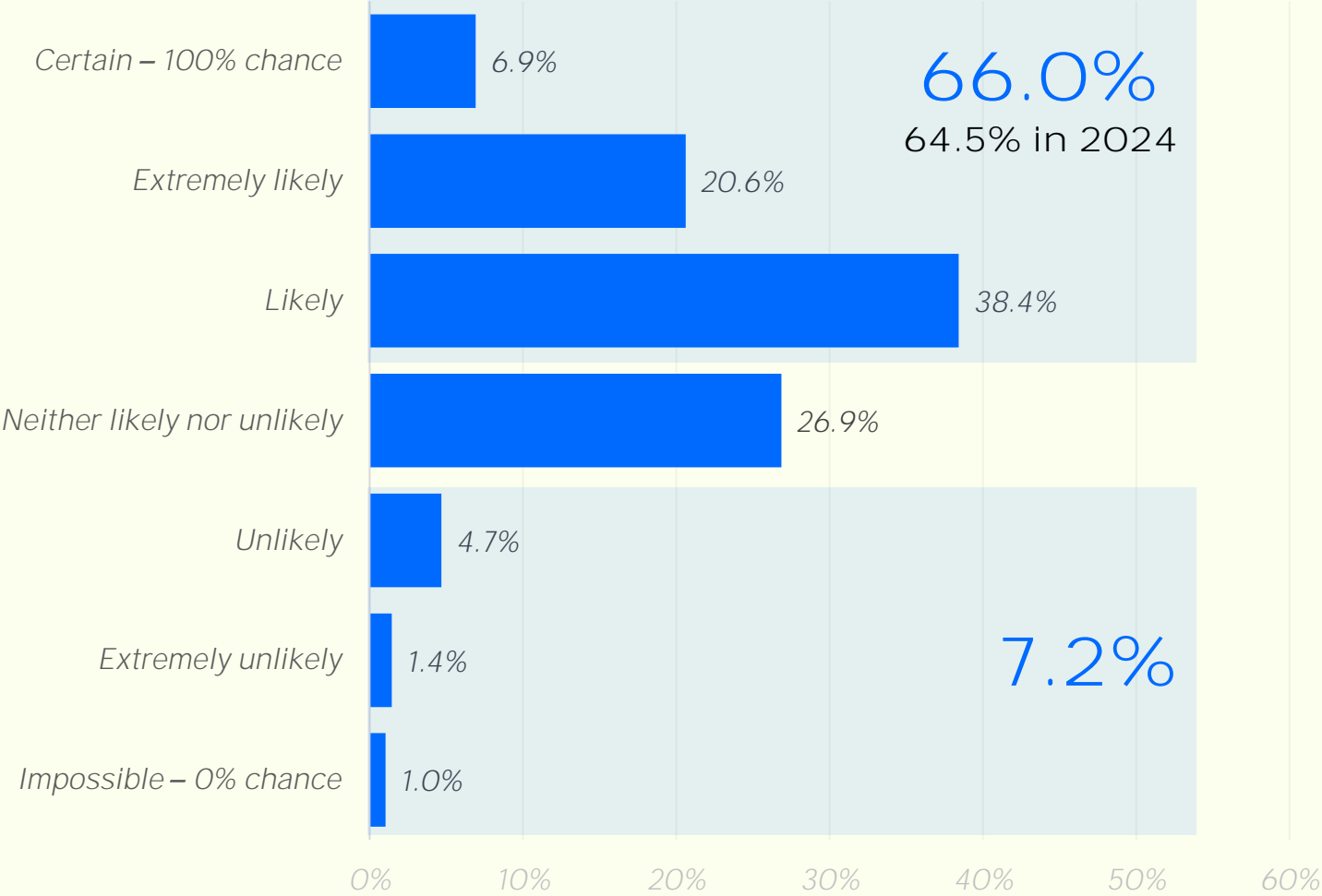
Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.

Future Partners

Like last year, 2-in-3 travelers see the market responding to high costs and crowding by moving to off-the-beaten-path destinations.

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.



Definition

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

Future Partners



Buy Now, Pay Later in 2025

Statement:

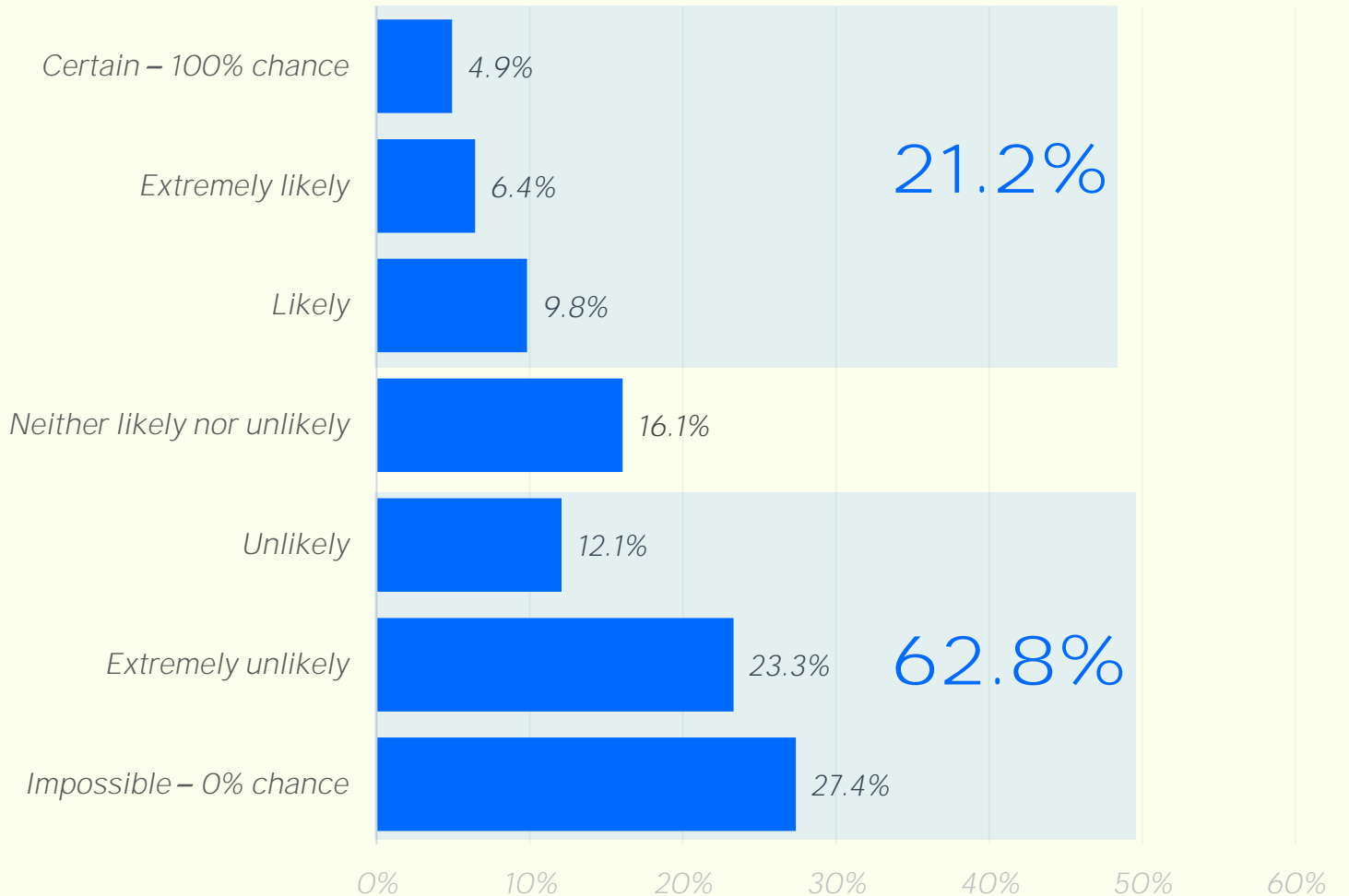
I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.

Future Partners

More than 1-in-5 American travelers expect to use BNPL offers for travel in the coming year.

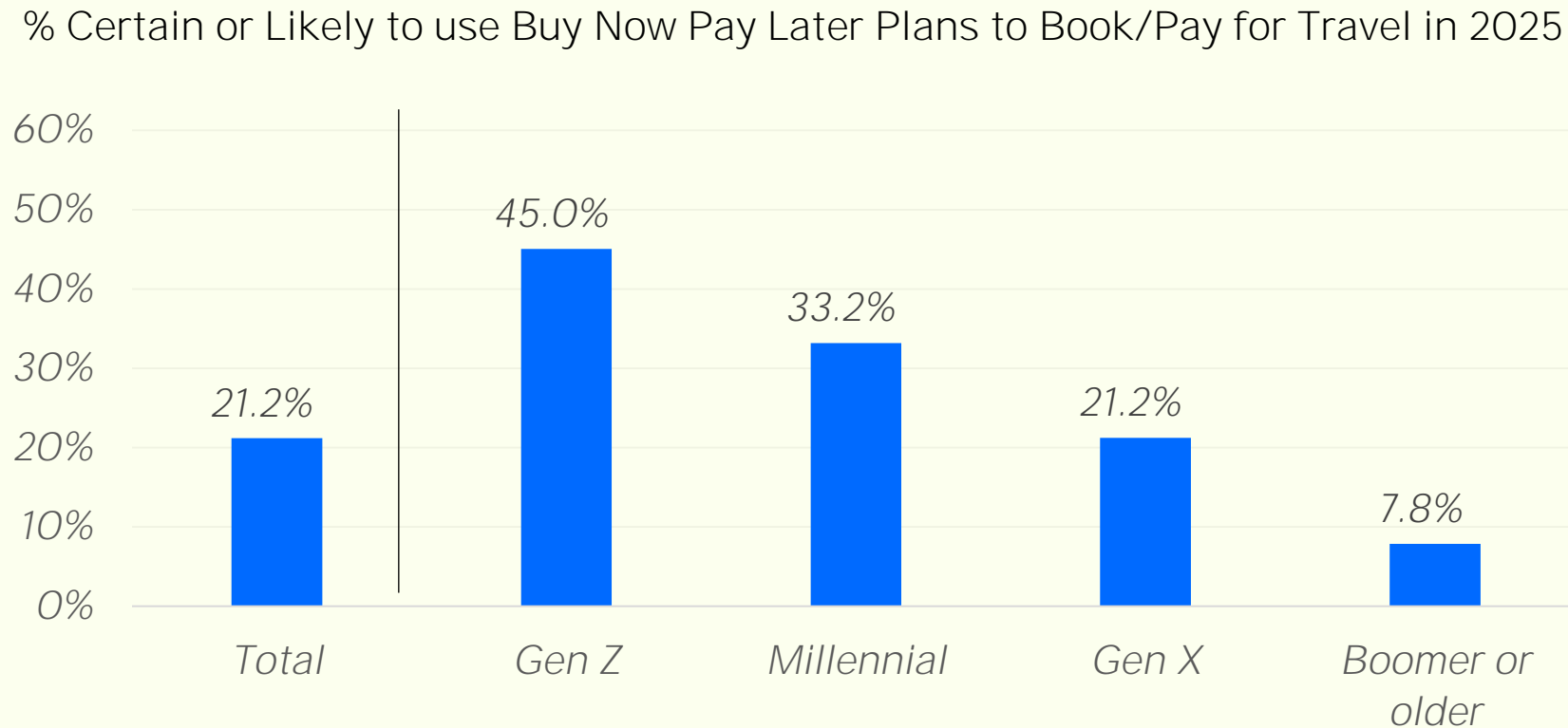
Statement:

I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.



Younger generations are the most likely to use BNPL options, particularly Gen Z

Statement: *I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.*





Spending on luxury travel

Statement:

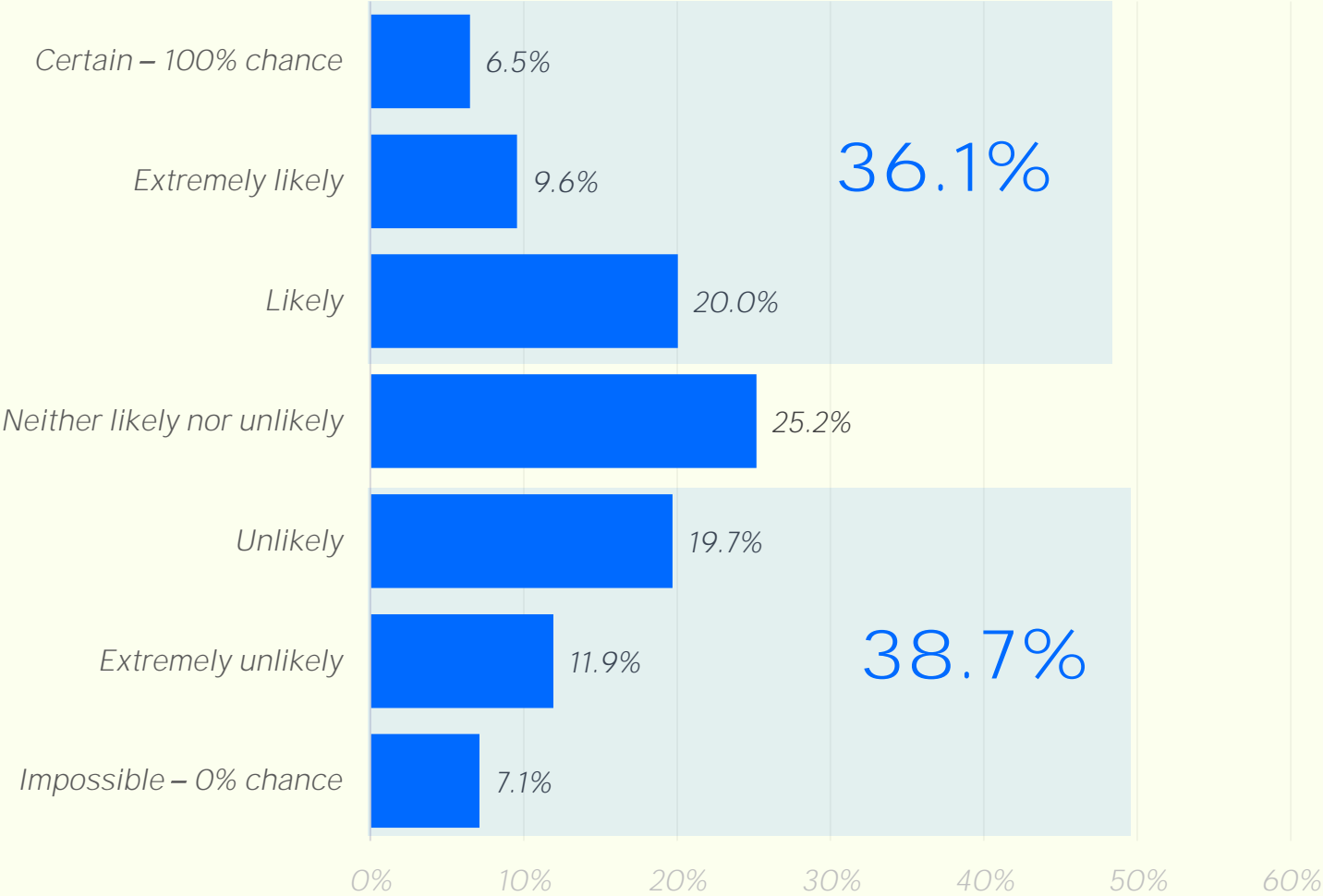
I will spend more money on luxury travel experiences.

Future Partners

Luxury travel experiences will matter to many American travelers.

Statement:

I will spend more money on luxury travel experiences.





Prediction #2

More (Personal and Travel)
Stress Ahead



A stressed-out nation?

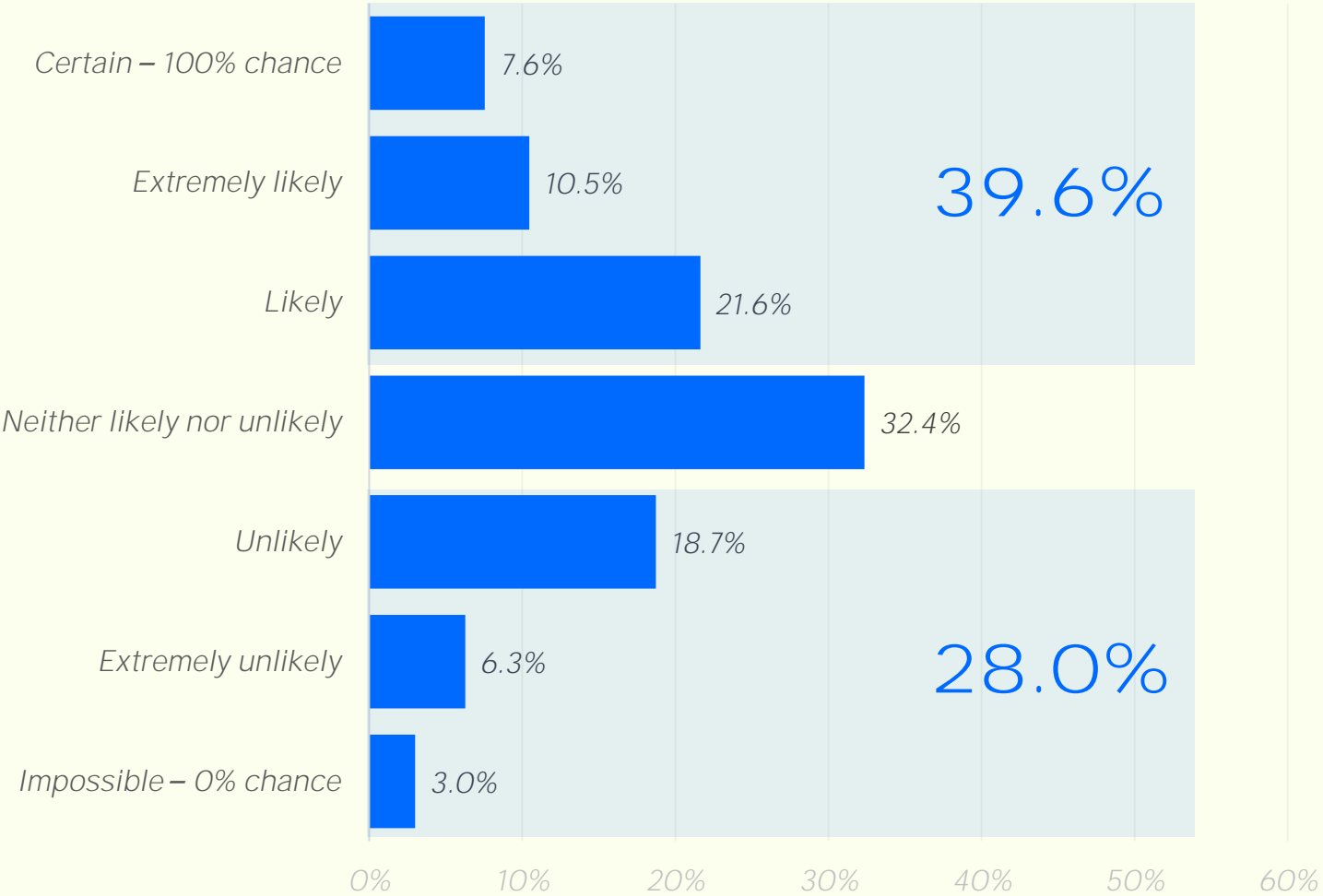
Statement:

My overall stress levels will rise significantly.

Nearly 40% of American travelers expect this year to be one of rising personal stress levels.

Statement:

My overall stress levels will rise significantly.





Travel frustrations continue

Statement:

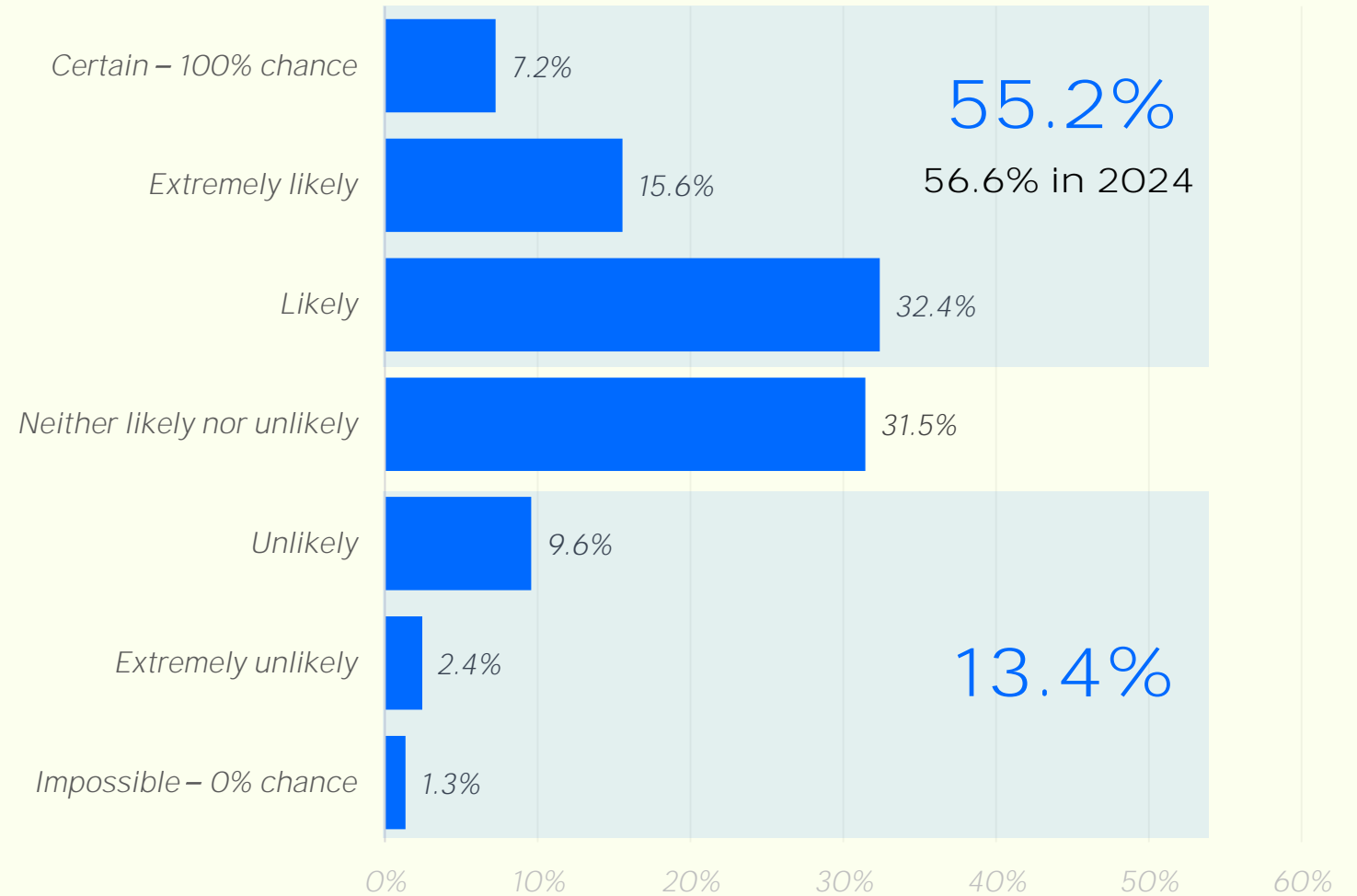
Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)

Future Partners

Many see domestic travel as an increasingly frustrating experience.

Statement:

Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)





Prediction #3

Concerns related to
sustainability will be of
significant but not growing
importance to travelers.



Mitigating environmental impact

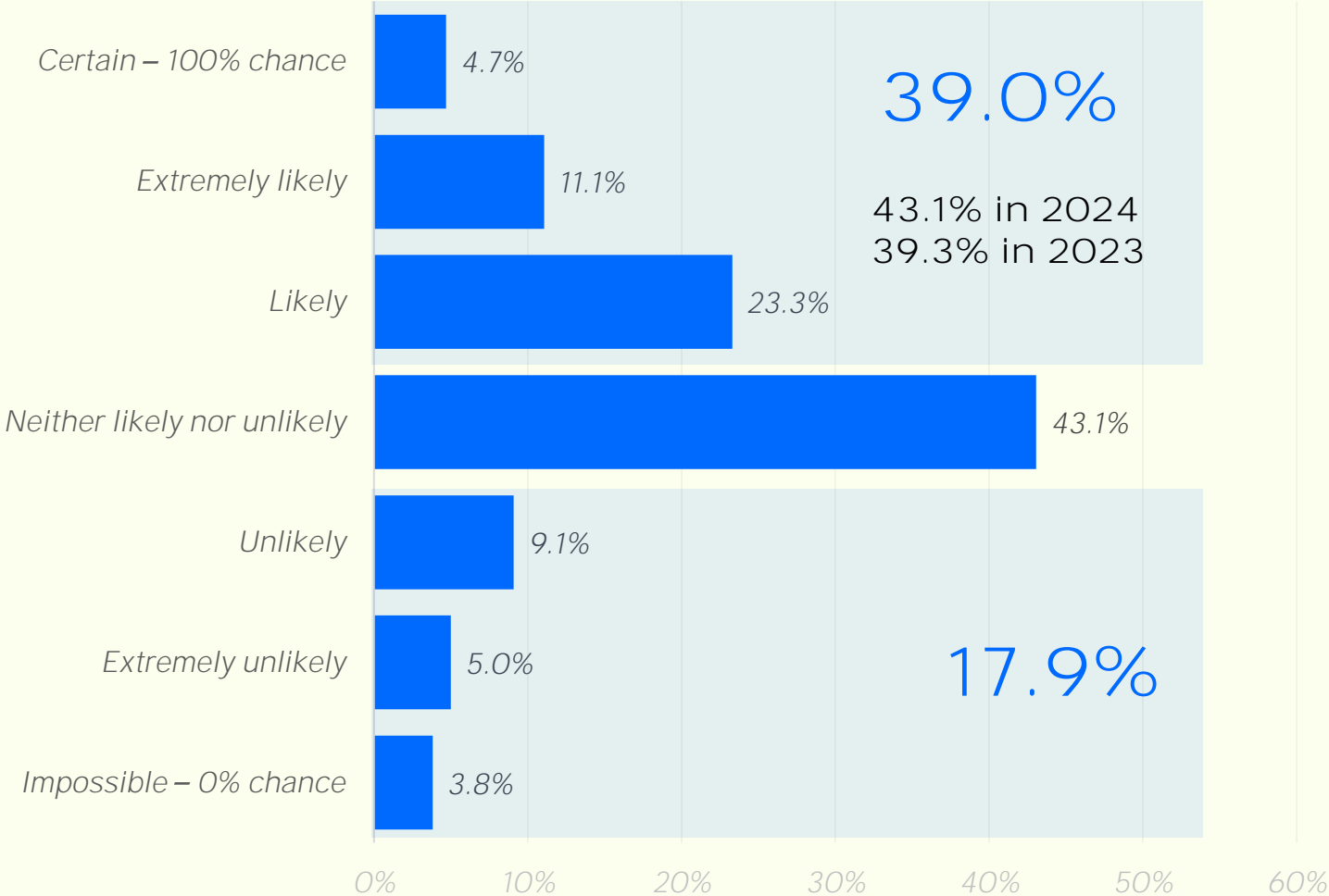
Statement:

I'll be more proactive in reducing the impact of my travel on the environment.

Four-in-ten travelers will be more proactive in reducing the impact of their travels on the environment.

Statement:

I'll be more proactive in reducing the impact of my travel on the environment.





Cooler places to travel

Statement:

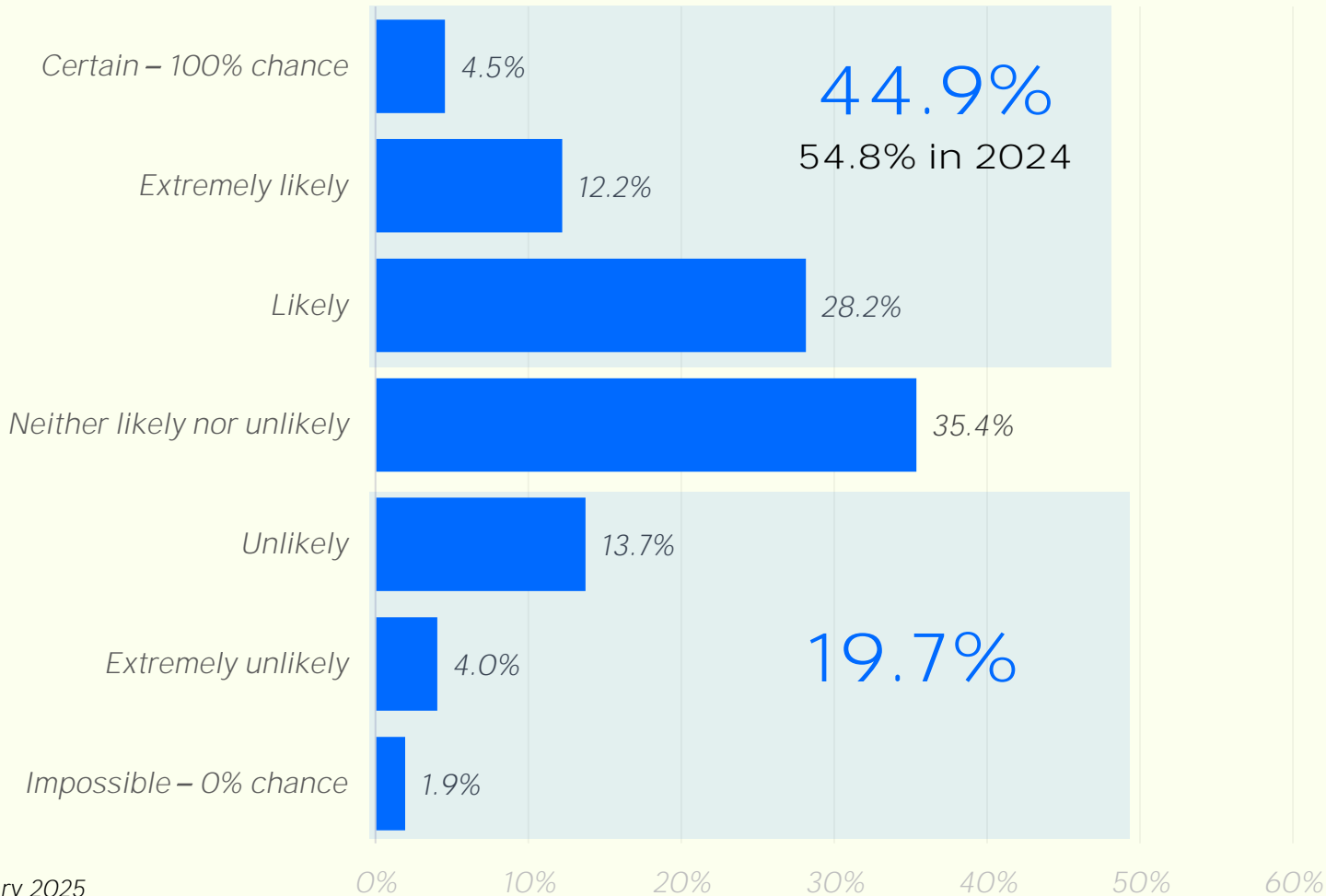
With higher temperatures each year, travelers will try to seek out cooler places.

Future Partners

45% of American travelers predict that increasingly warmer climates will drive travelers to seek cooler destinations for their trips

Statement:

With higher temperatures each year, travelers will try to seek out cooler places.





Prediction #4

Technology will play
a growing role in the
evolution of travel planning.



Artificial Intelligence as a travel planning tool

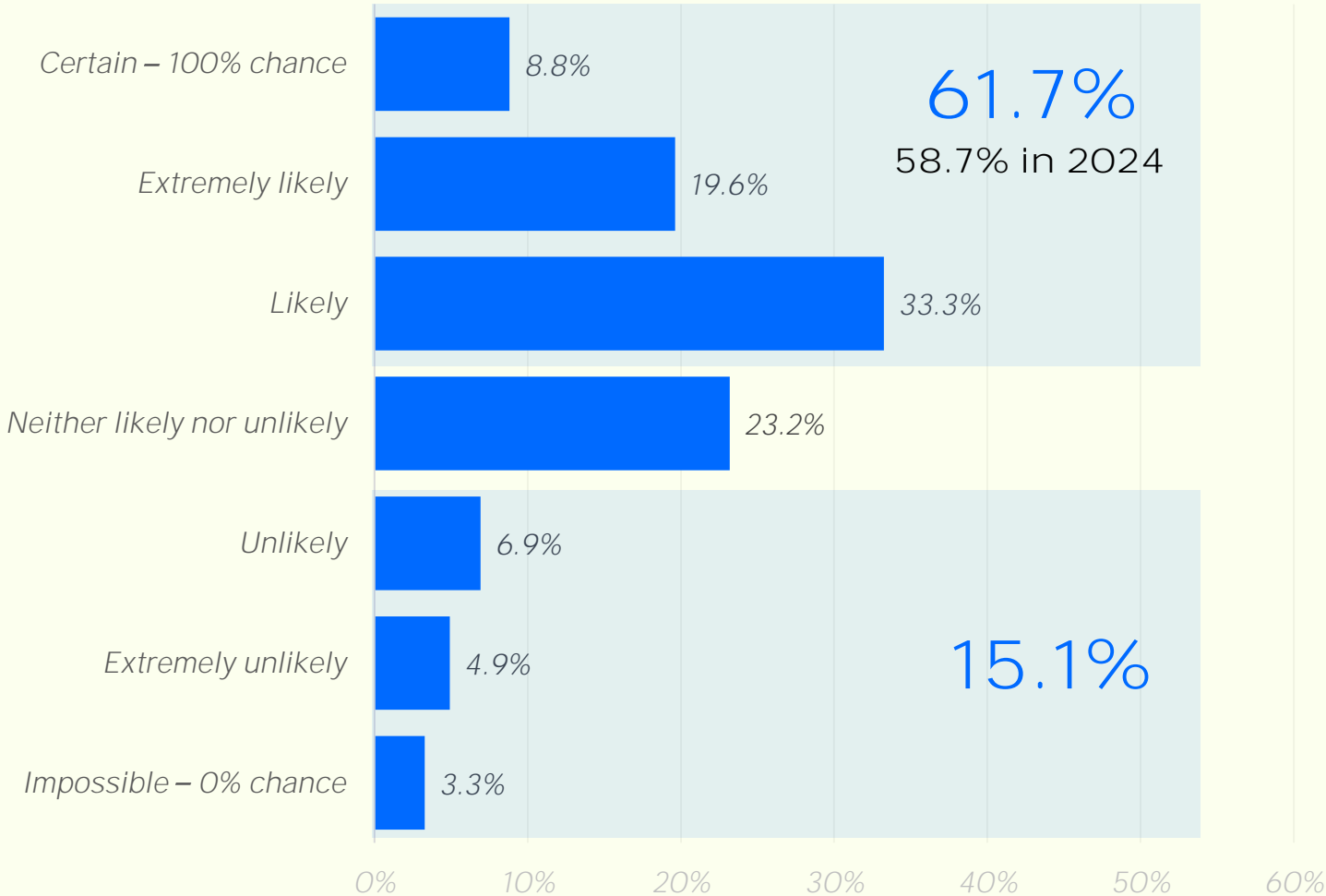
Statement:

Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.

Future Partners

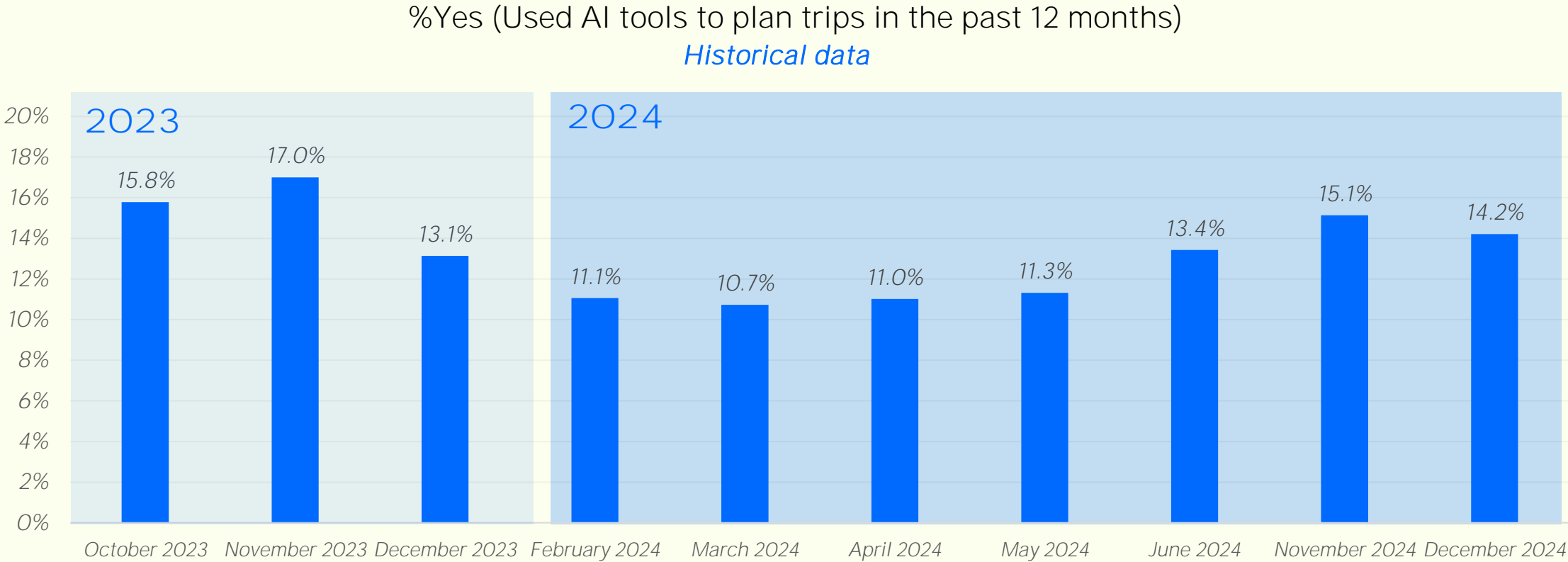
Robots will soon be planning our trips? Maybe not, but travelers see AI as growing in importance to the travel planning landscape.

Statement:
Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.



However, adoption of AI tools for travel planning has not yet gained significant ground.

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





Communication breakdowns. A thing of the past?

Statement:

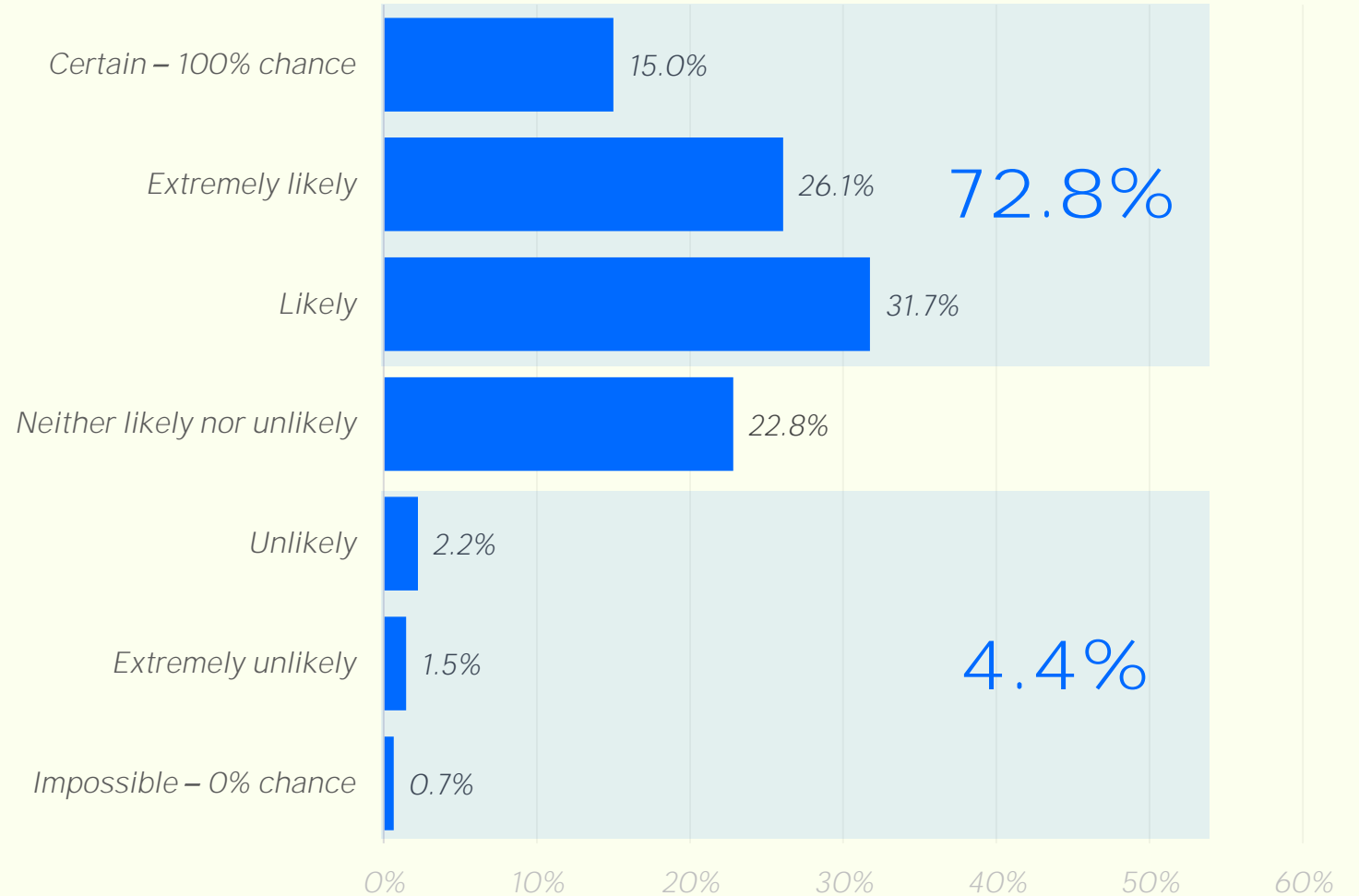
Apps for translating languages will be used more when traveling abroad.

Future Partners

Translation apps for international travel are anticipated to see heavy use in the coming year.

Statement:

Apps for translating languages will be used more when traveling abroad.





Smart phone addiction disorder (SPAD)

Statement:

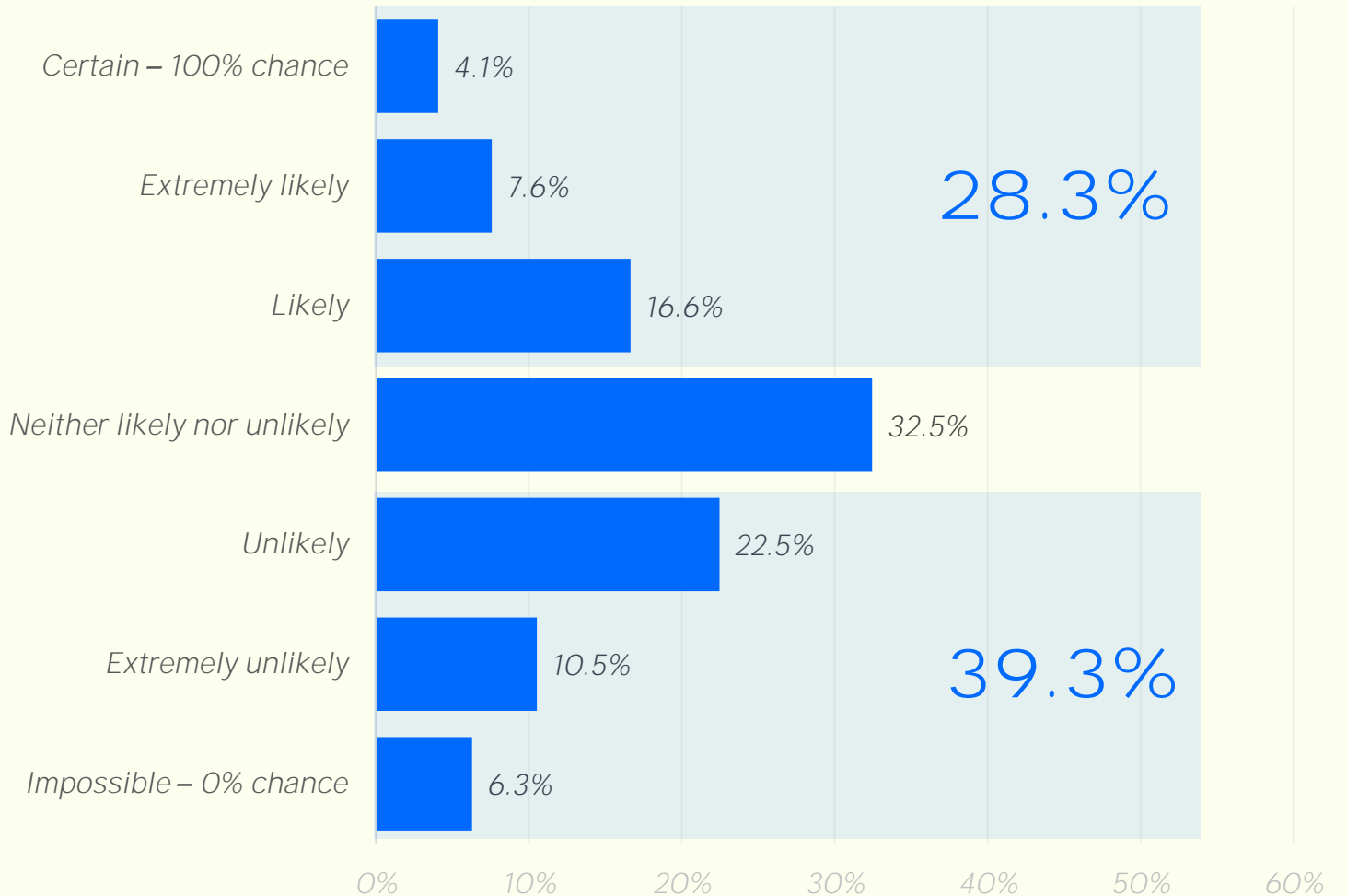
*I will make an effort to reduce my
smartphone use.*

Future Partners

Over 28% of American travelers will try and reduce their smart phone usage.

Statement:

I will make an effort to reduce my smartphone use.





Mainstream Media Blues

Statement:

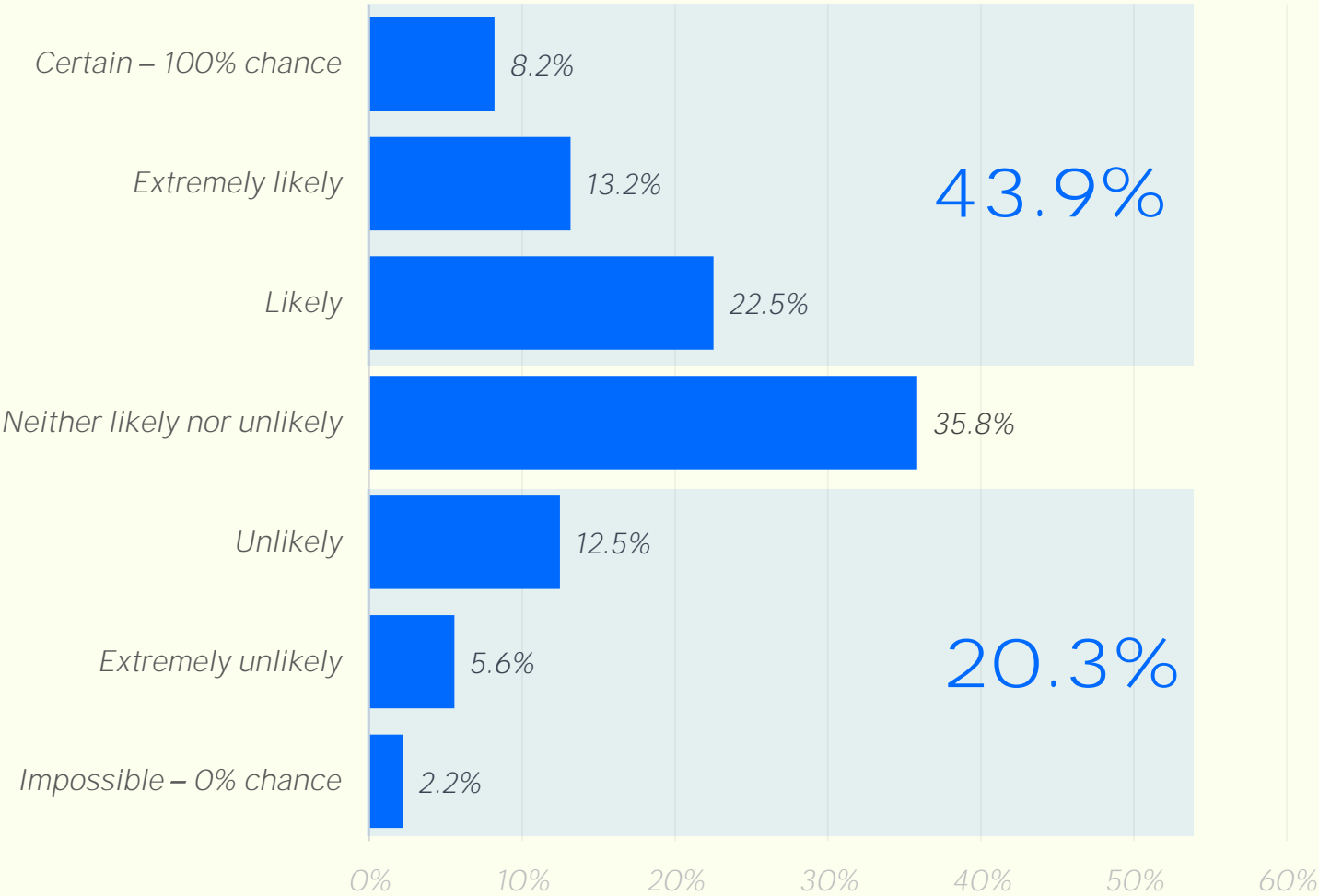
The relevancy of traditional media sources (like ABC, Fox News, NBC, Wall Street Journal) will decline.

Future Partners

By a 2-to-1 ratio, travelers feel traditional media sources will wane in relevancy.

Statement:

The relevancy of traditional media sources (like ABC, Fox News, NBC, Wall Street Journal) will decline.





Prediction #5

Modern employment and
work options will
encourage more travel.



Will flexible employment options will drive more travel?

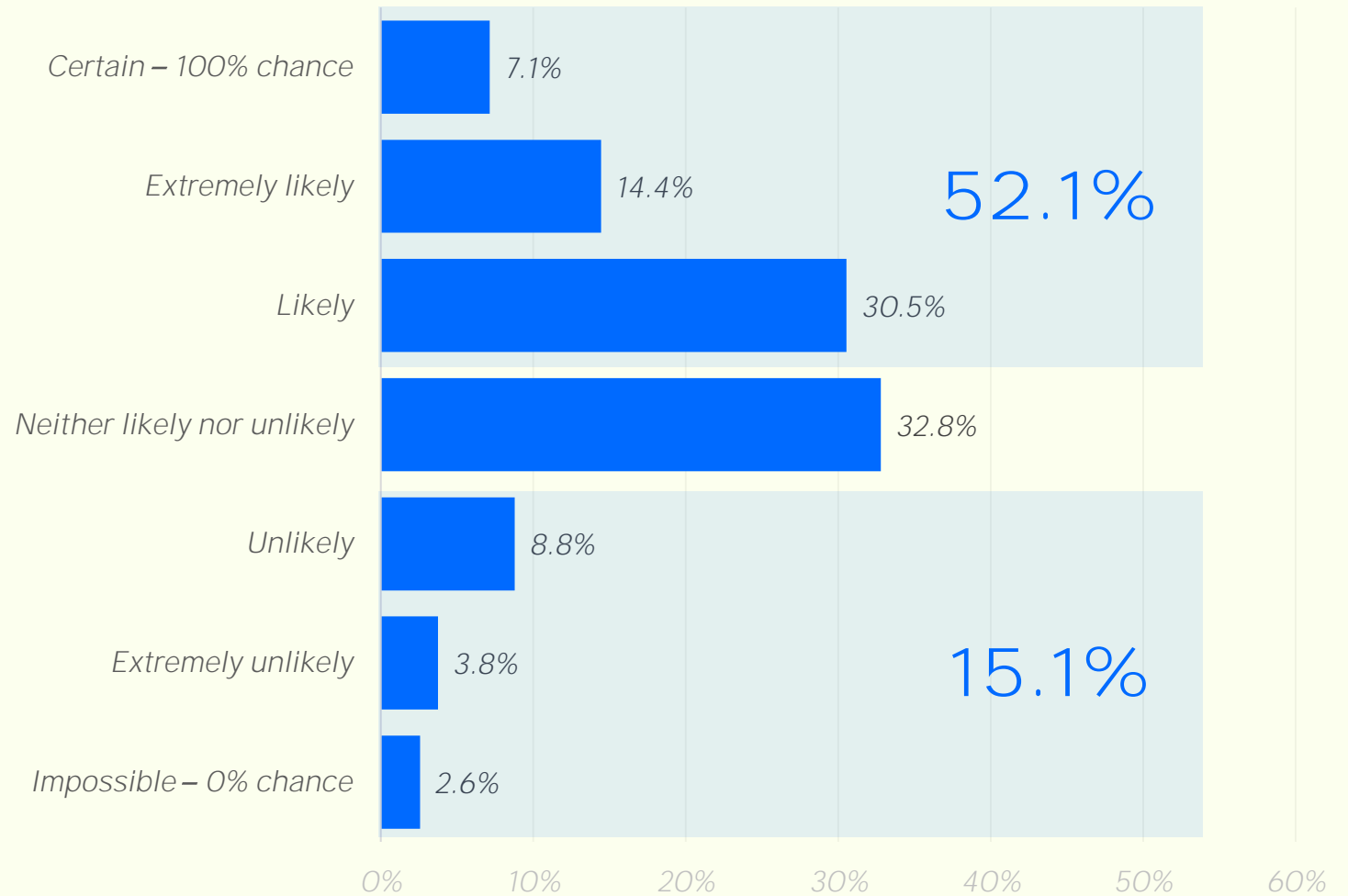
Statement:

Flexible work options, like remote or hybrid employment, will inspire people like me to take more leisure trips.

More than half of American travelers see workplace flexibility as a catalyst for more travel.

Statement:

Flexible work options, like remote or hybrid employment, will inspire people like me to take more leisure trips.





Prediction #6

Politics will impact both
inbound and outbound
travel markets.



Politics and travel

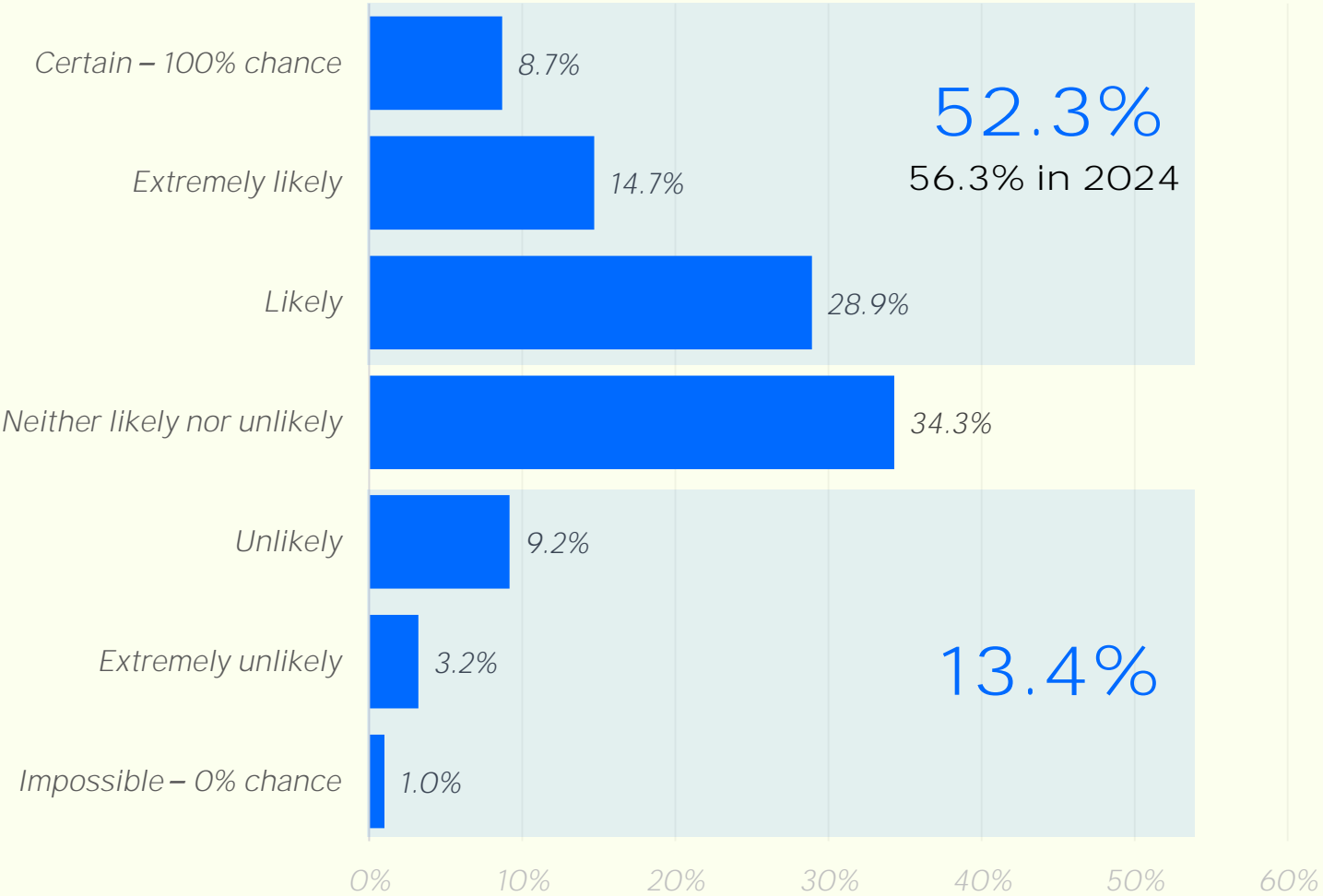
Statement:

More travelers will avoid (or select) destinations based on their personal politics.

More than half of travelers see politics as influencing the places Americans visit.

Statement:

More travelers will avoid (or select) destinations based on their personal politics.





Will international travelers avoid the USA?

Statement:

International tourists will avoid visiting the U.S. because of its contentious politics.

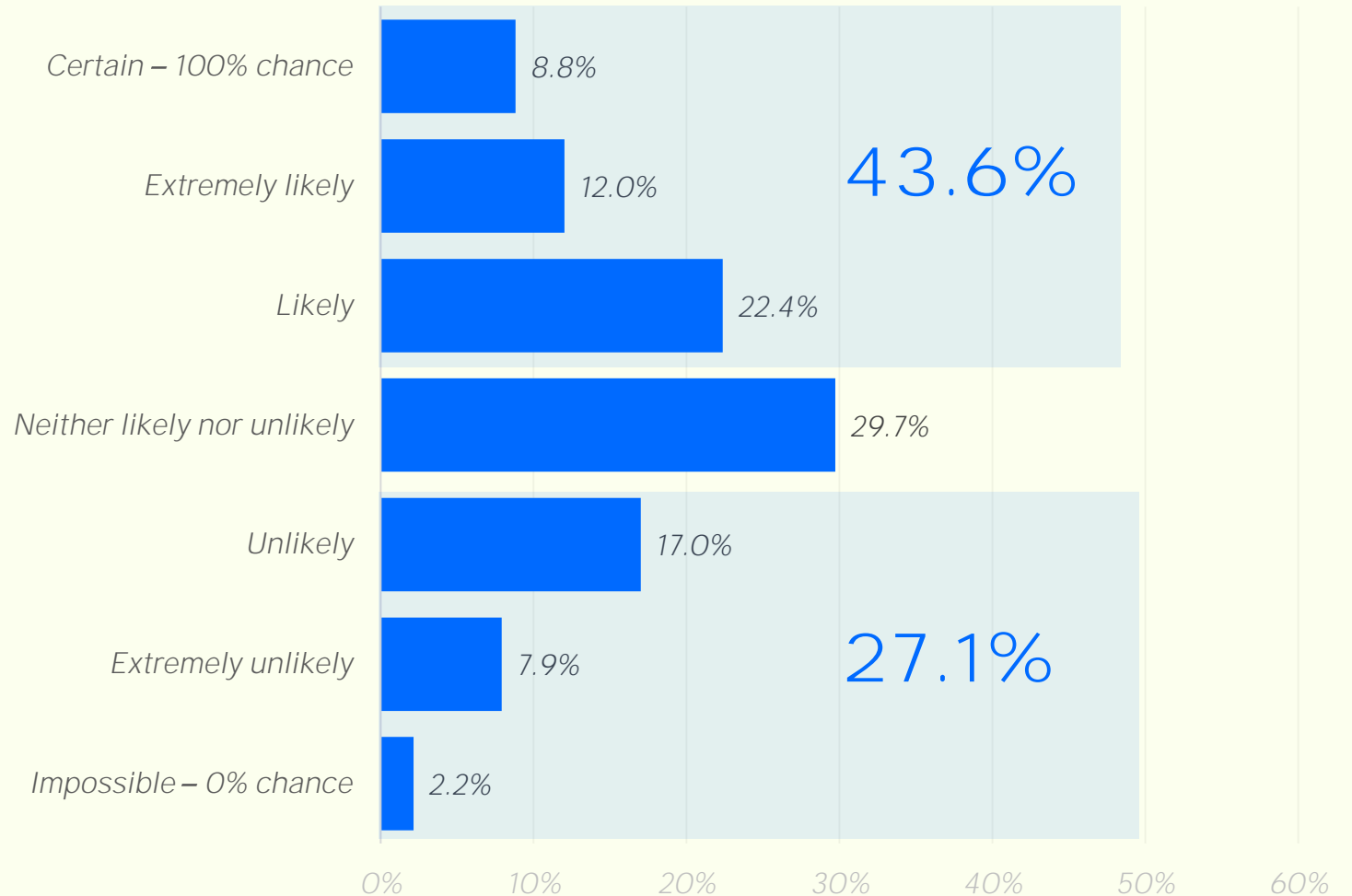
Future Partners

Will foreign travelers skip the USA in 2025?

43.6% of American travelers think this is likely.

Statement:

International tourists will avoid visiting the U.S. because of its contentious politics.



*A Look Back at Global Traveler
Sentiment Post-2020 U.S. Election*

The State of the International Traveler Study

- Tracking survey of international travelers in 15 key global travel markets
- N =11,200 (800 from each market)

Markets:

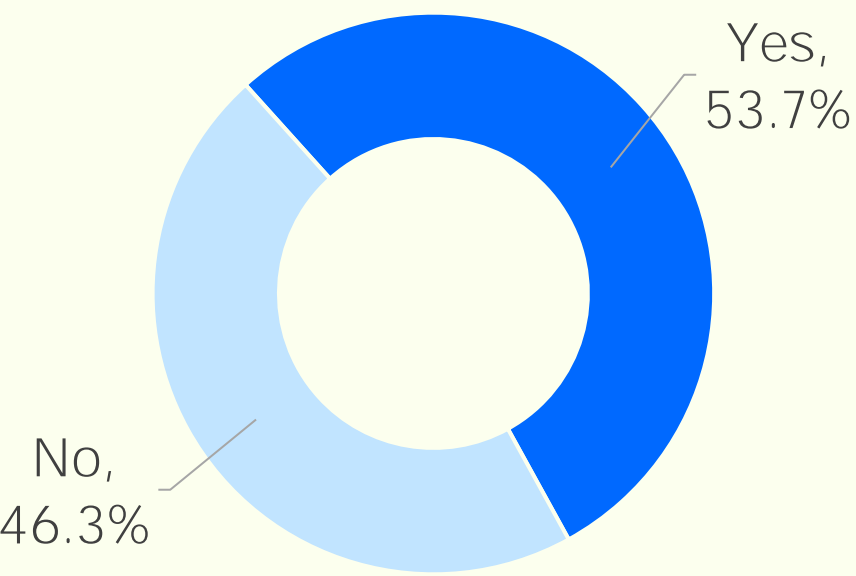




Question: *Does the current political climate of United States have an impact on your desire to visit the U.S?*

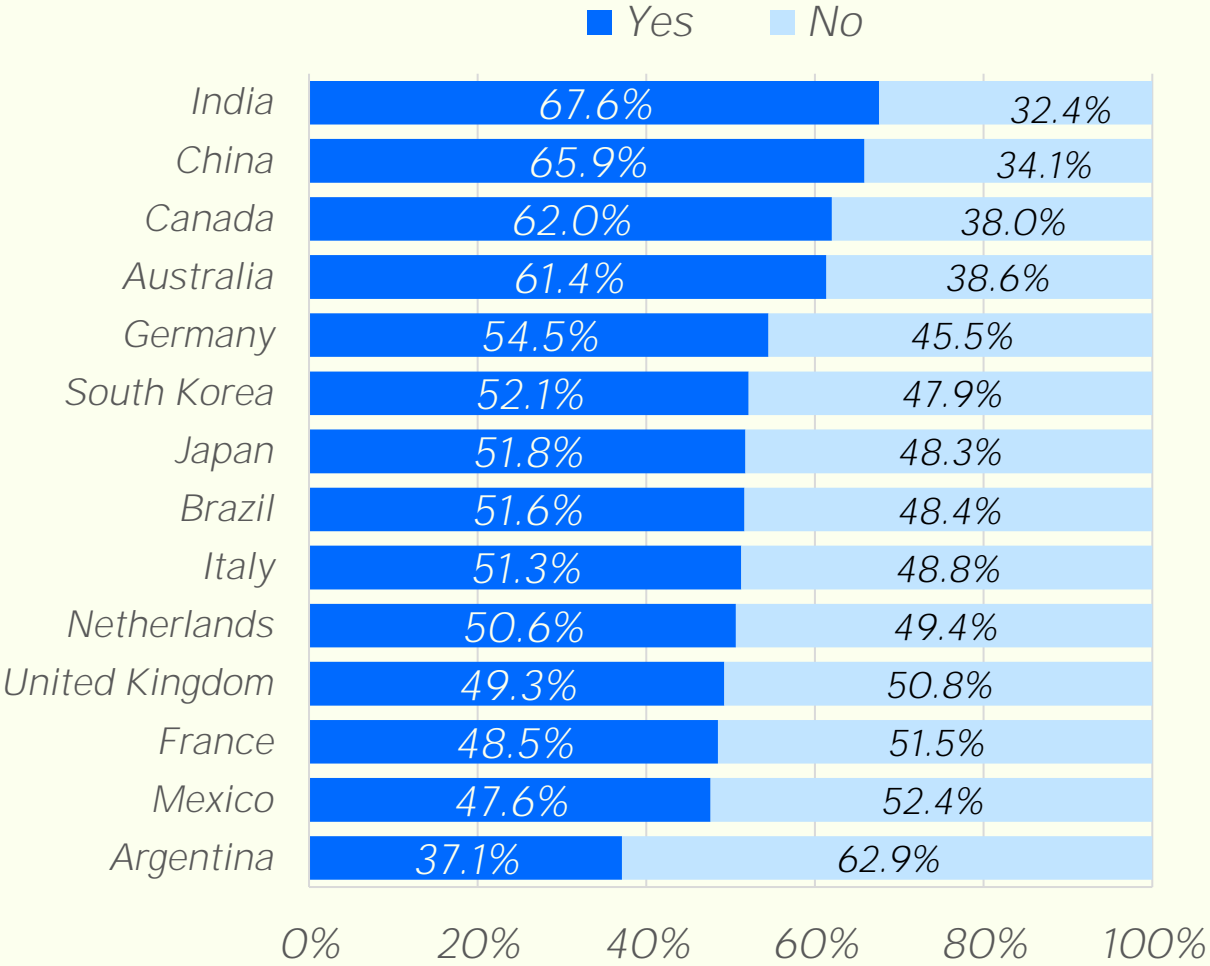
Effects of the American Political Climate (Post-2020 Election)

Overall Impact of Current Political Climate of U.S.



Question: Does the current political climate of United States have an impact on your desire to visit the U.S?

Impact of Current Political Climate of U.S. on Desire to Visit U.S.





Will American travelers be unwelcome abroad?

Statement:

Foreign destinations will become less welcoming to American travelers

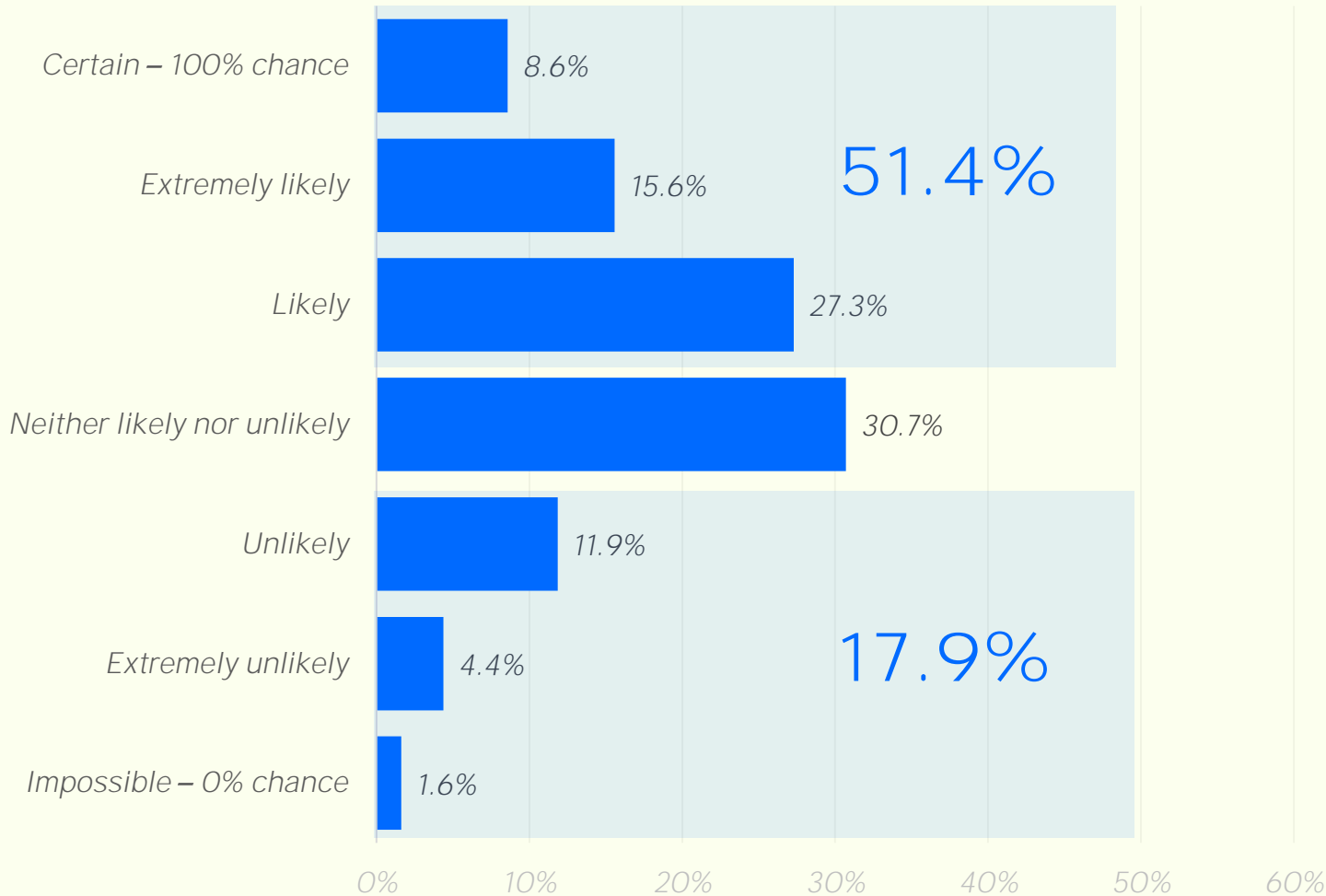
Future Partners



Americans aren't confident they will be warmly welcomed when visiting foreign countries in 2025.

Statement:

Foreign destinations will become less welcoming to American travelers





Destinations capping travel volume

Statement:

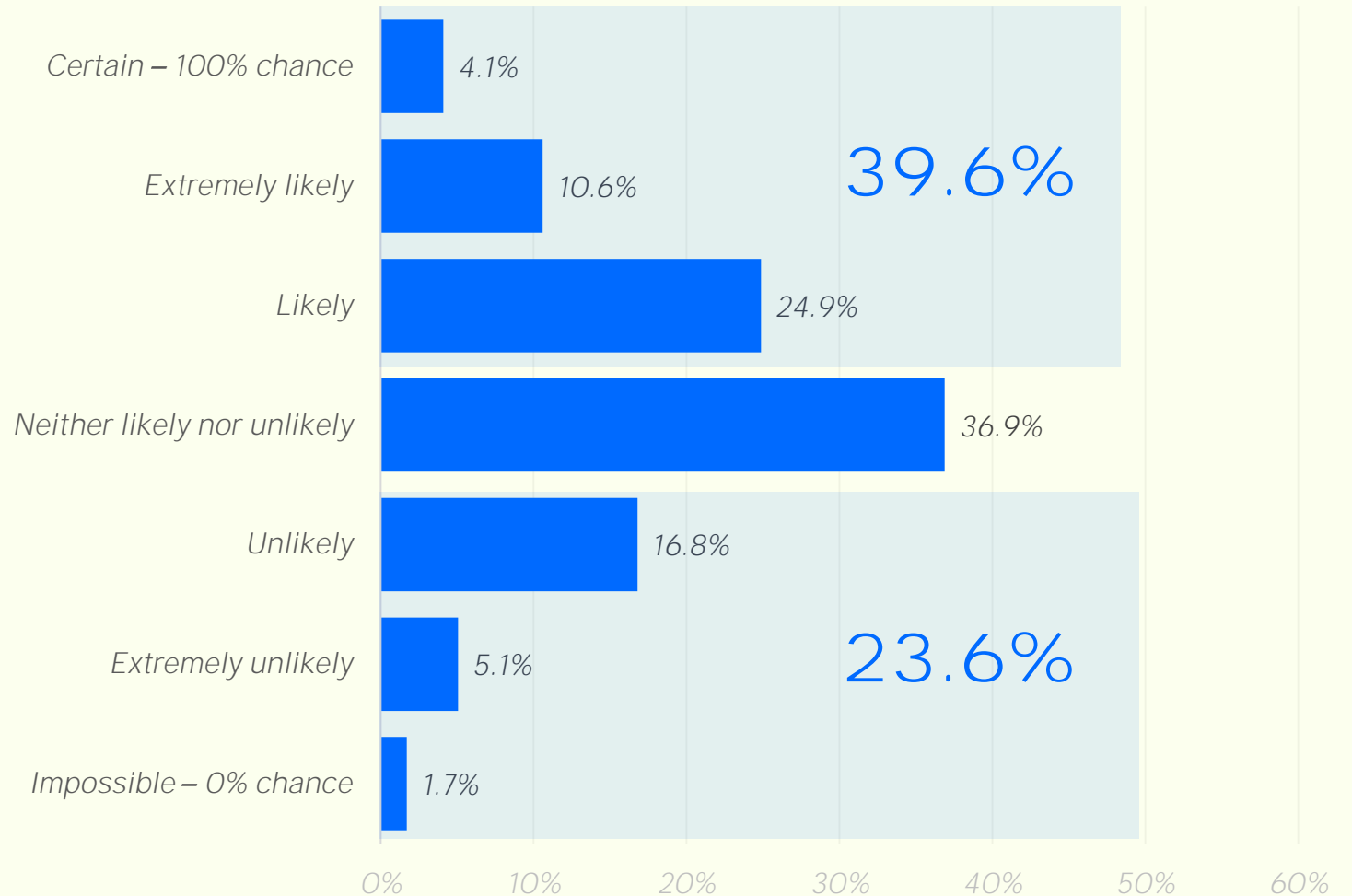
More destinations will start capping the number of tourists to protect their communities.

Future Partners

Nearly 40% of travelers expect that destinations will start capping the number of tourists allowed to protect their communities.

Statement:

More destinations will start capping the number of tourists to protect their communities





Anti-tourism protests

Statement:

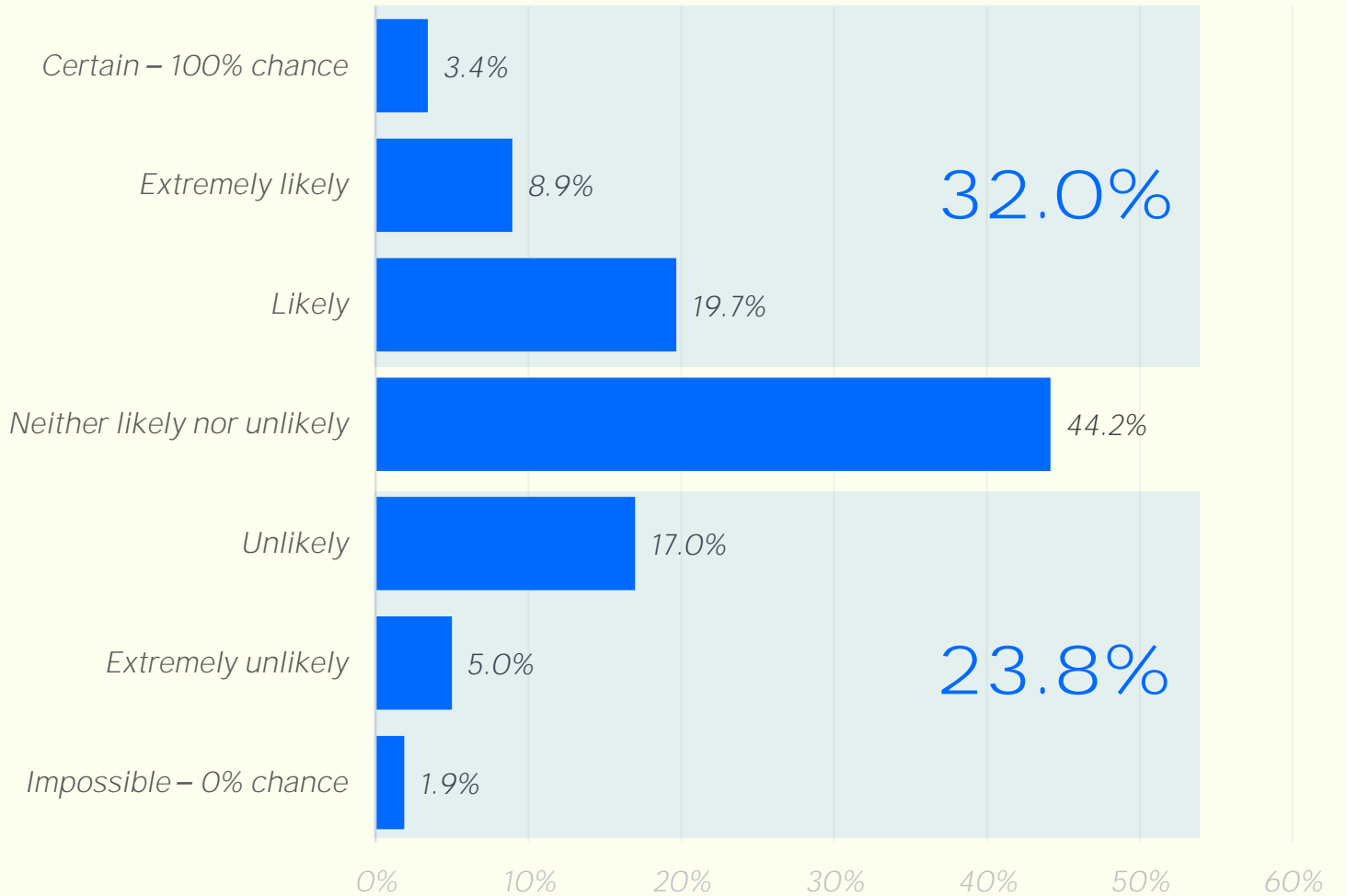
Anti-tourism protests will become more common.

Future Partners

Americans are split on the potential for a growth in anti-tourism protests in the next year.

Statement:

Anti-tourism protests will become more common.





Prediction #6

Most of us are going to
have a good year in 2025.



Stepping outside our comfort zones

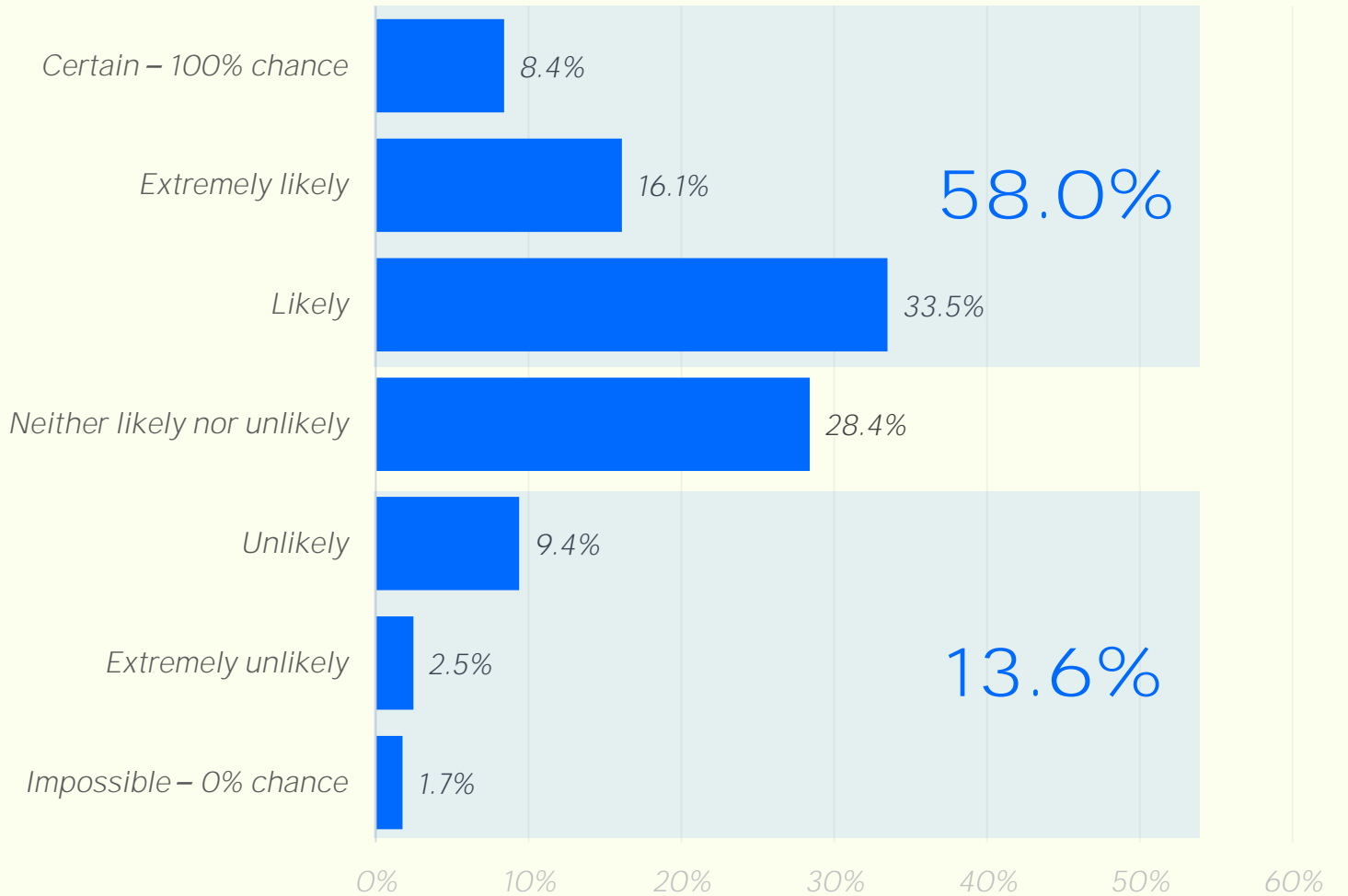
Statement:

I will use travel as an opportunity to step outside my comfort zone.

A significant number of Americans will use travel as a way to step outside their comfort zone this year.

Statement:

I will use travel as an opportunity to step outside my comfort zone.





Dream trips on the rise

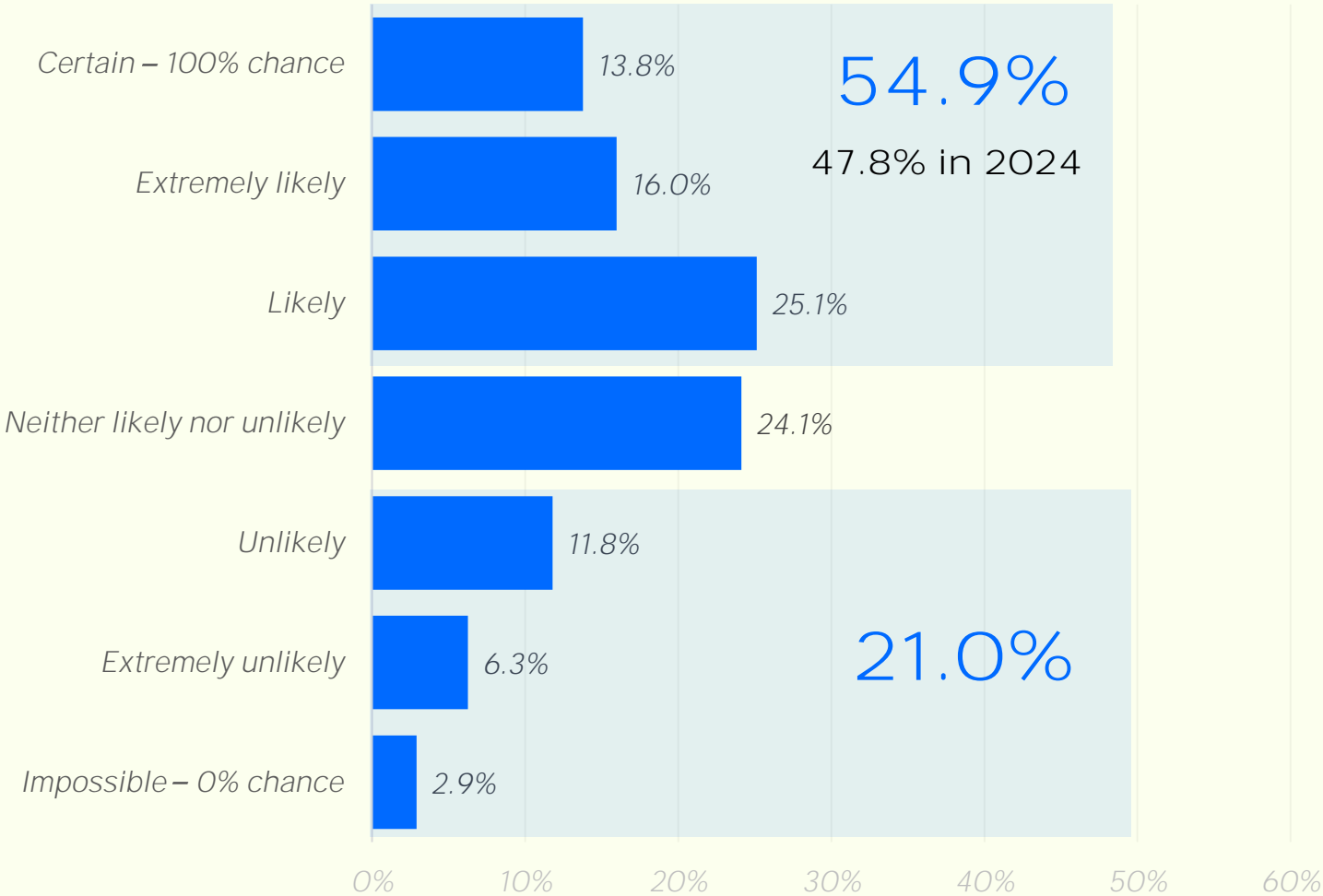
Statement:

I'll take a dream trip to somewhere exciting in 2025.

Future Partners

A growing number of travelers see it as likely that **they'll take a dream trip to somewhere exciting** in the next year.

Statement:
I'll take a dream trip to somewhere exciting in 2025





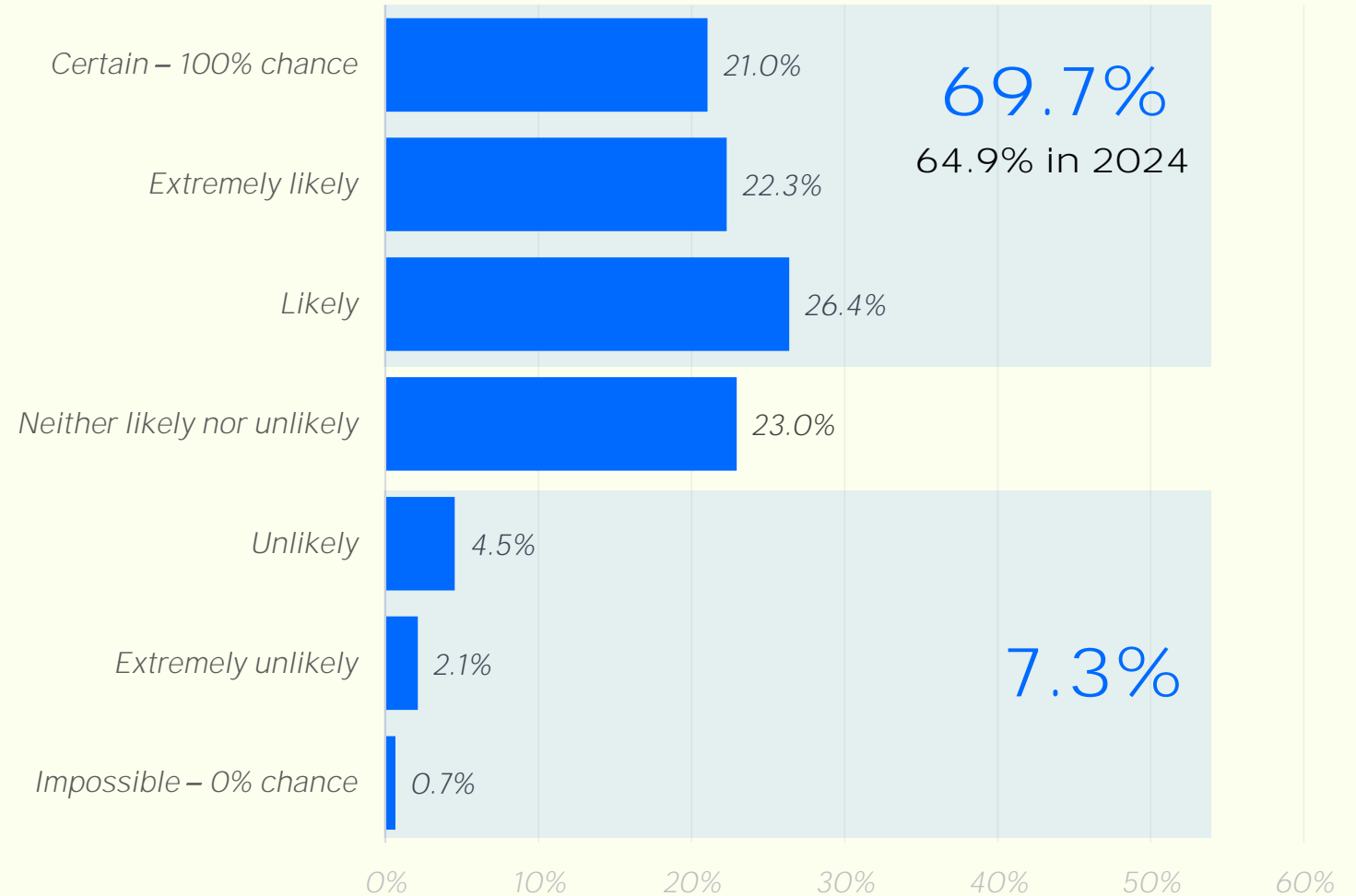
2025 is looking good!

Statement:

2025 will be a great year for me.

Americans are highly optimistic about 2025.

Statement:
2025 will be a great year for me.

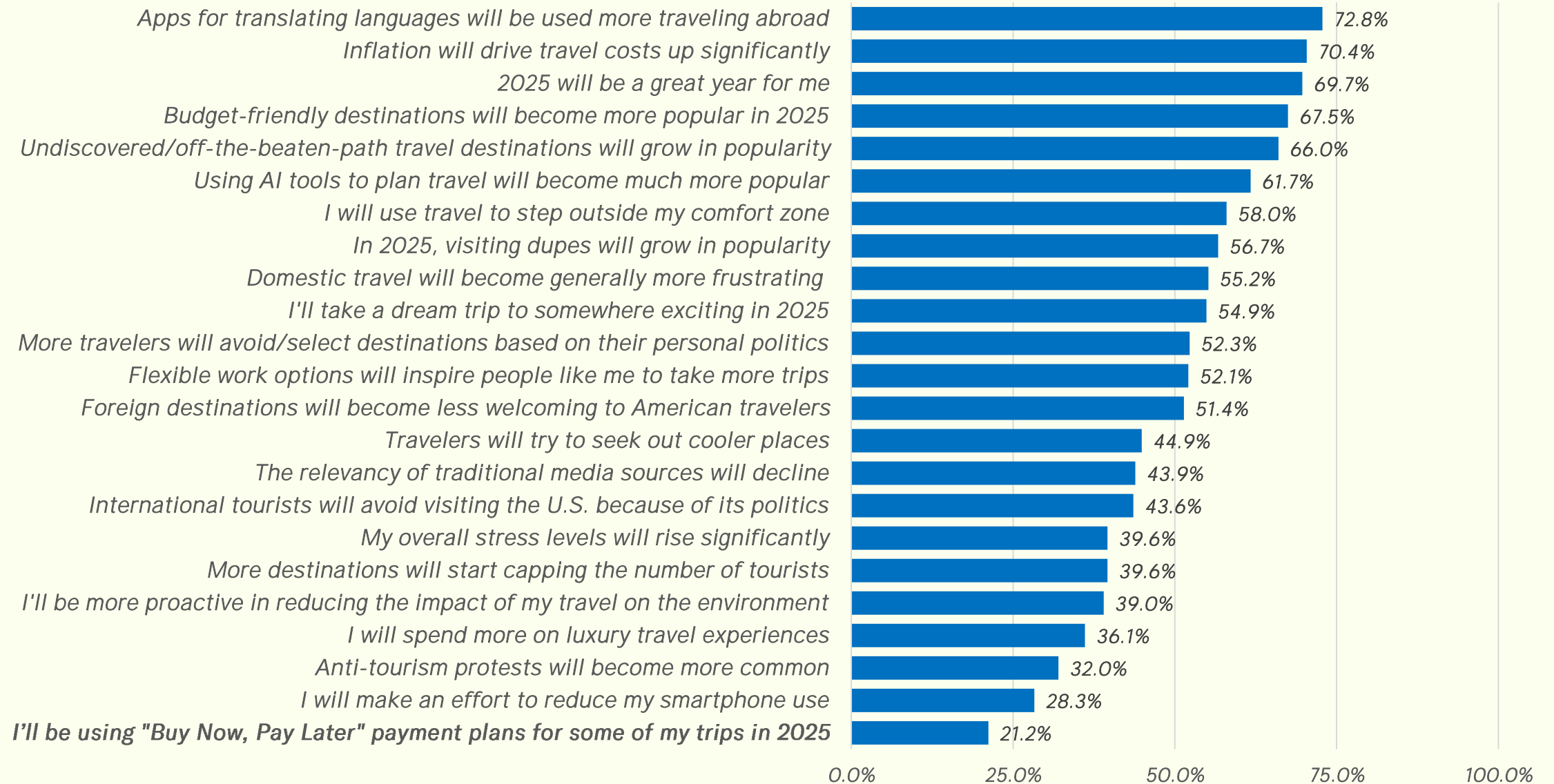


Travel Nostradamus



American Travelers Likely Predictions for 2025

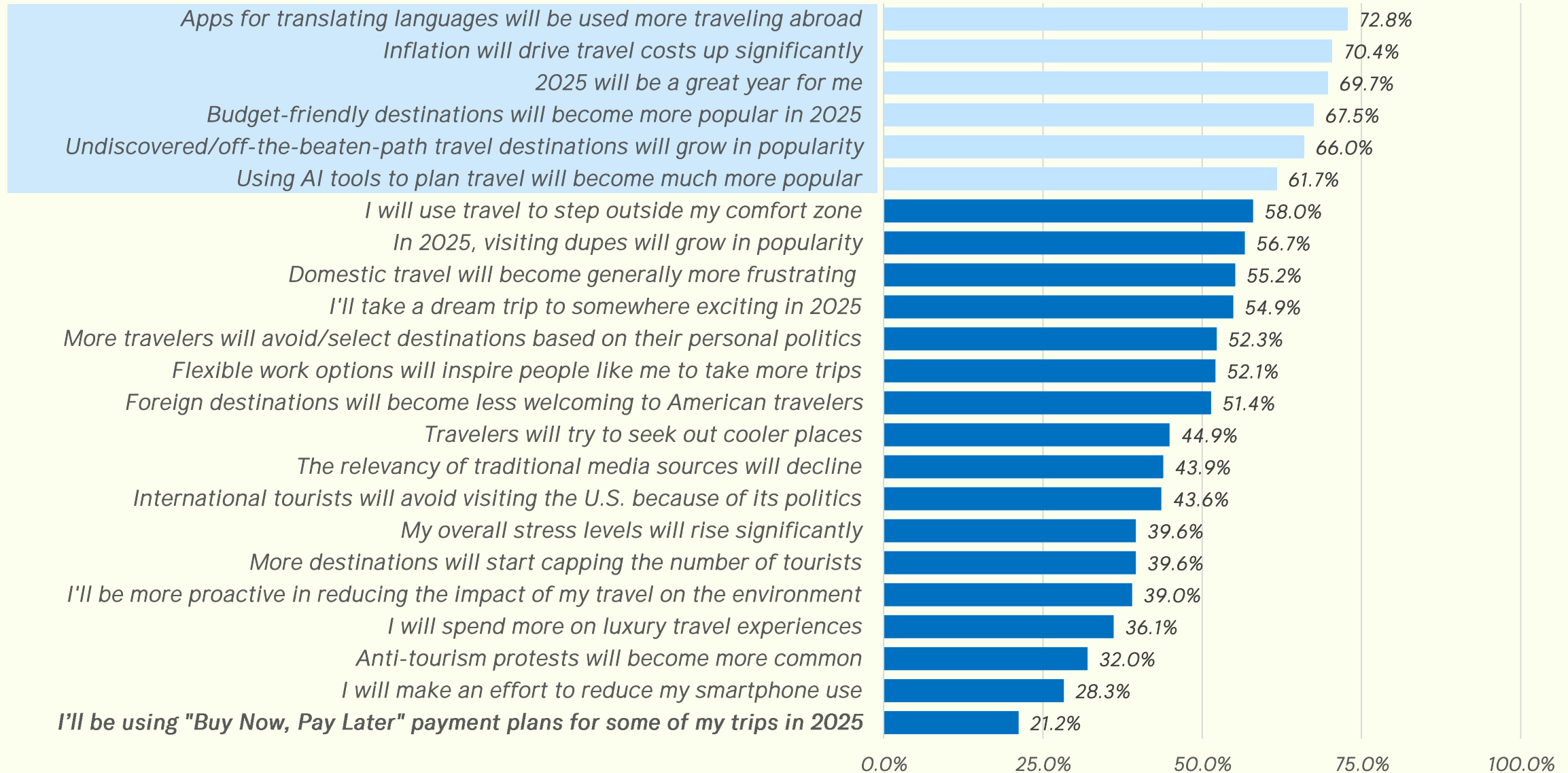
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

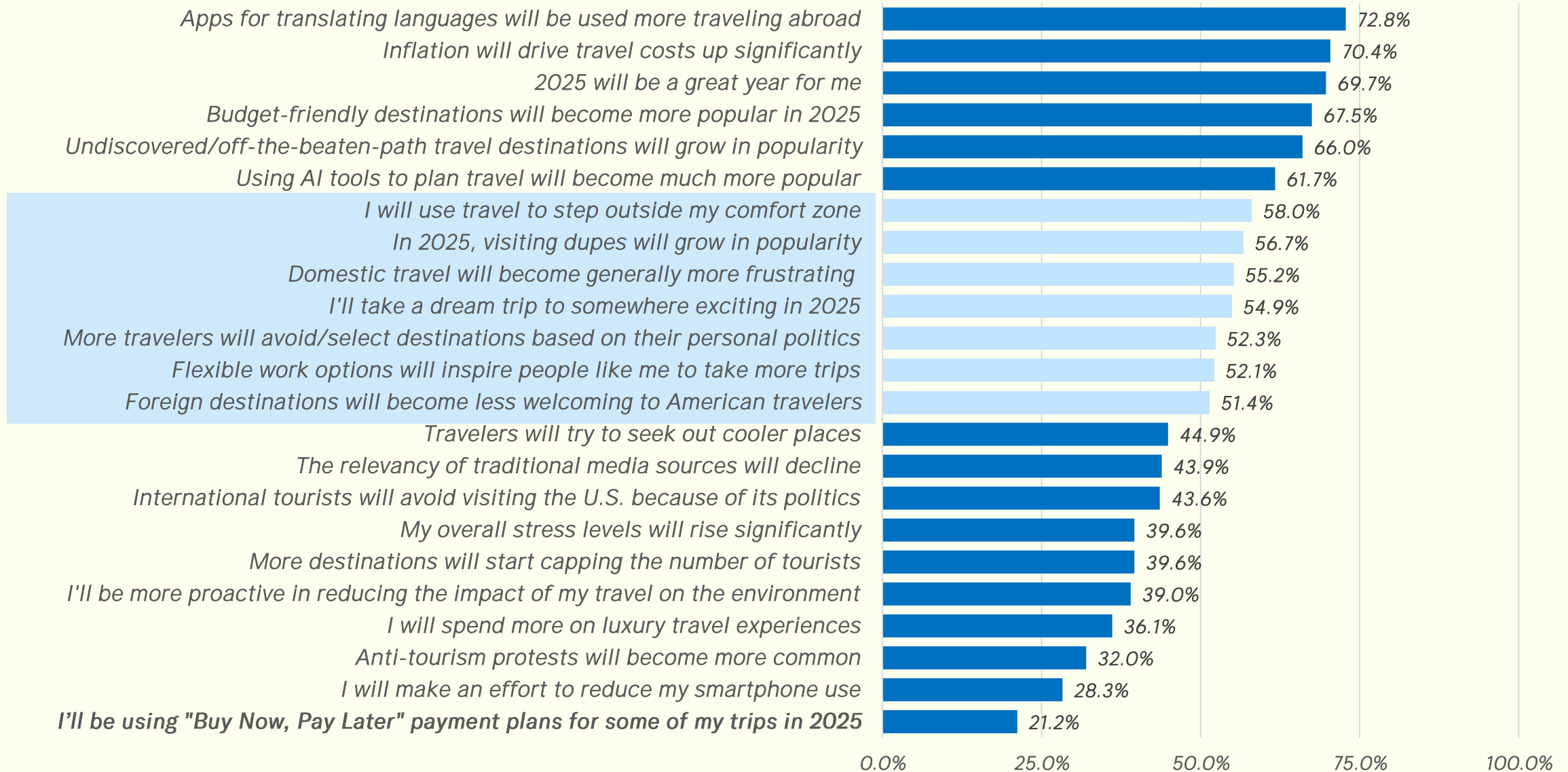
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

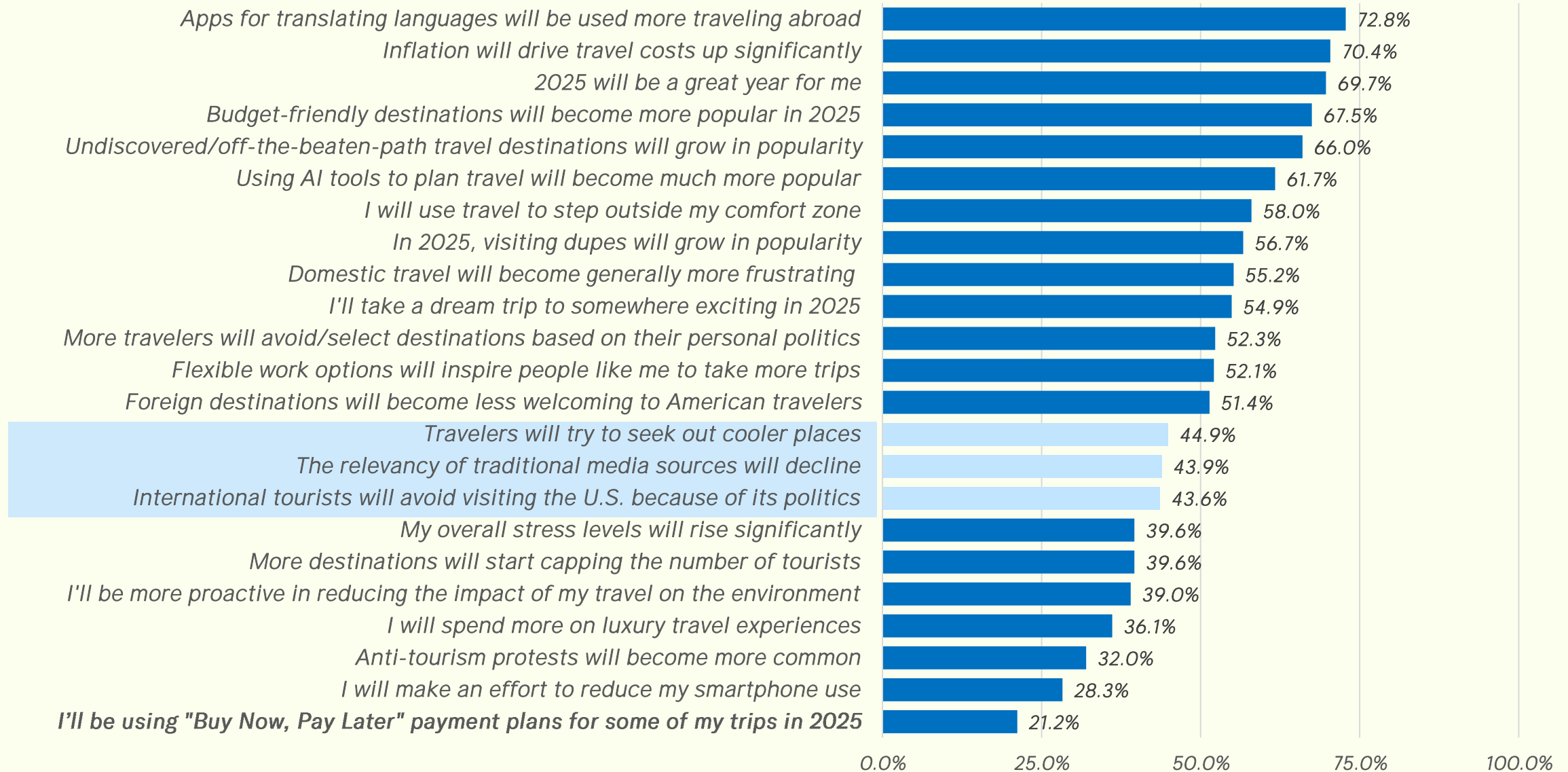
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

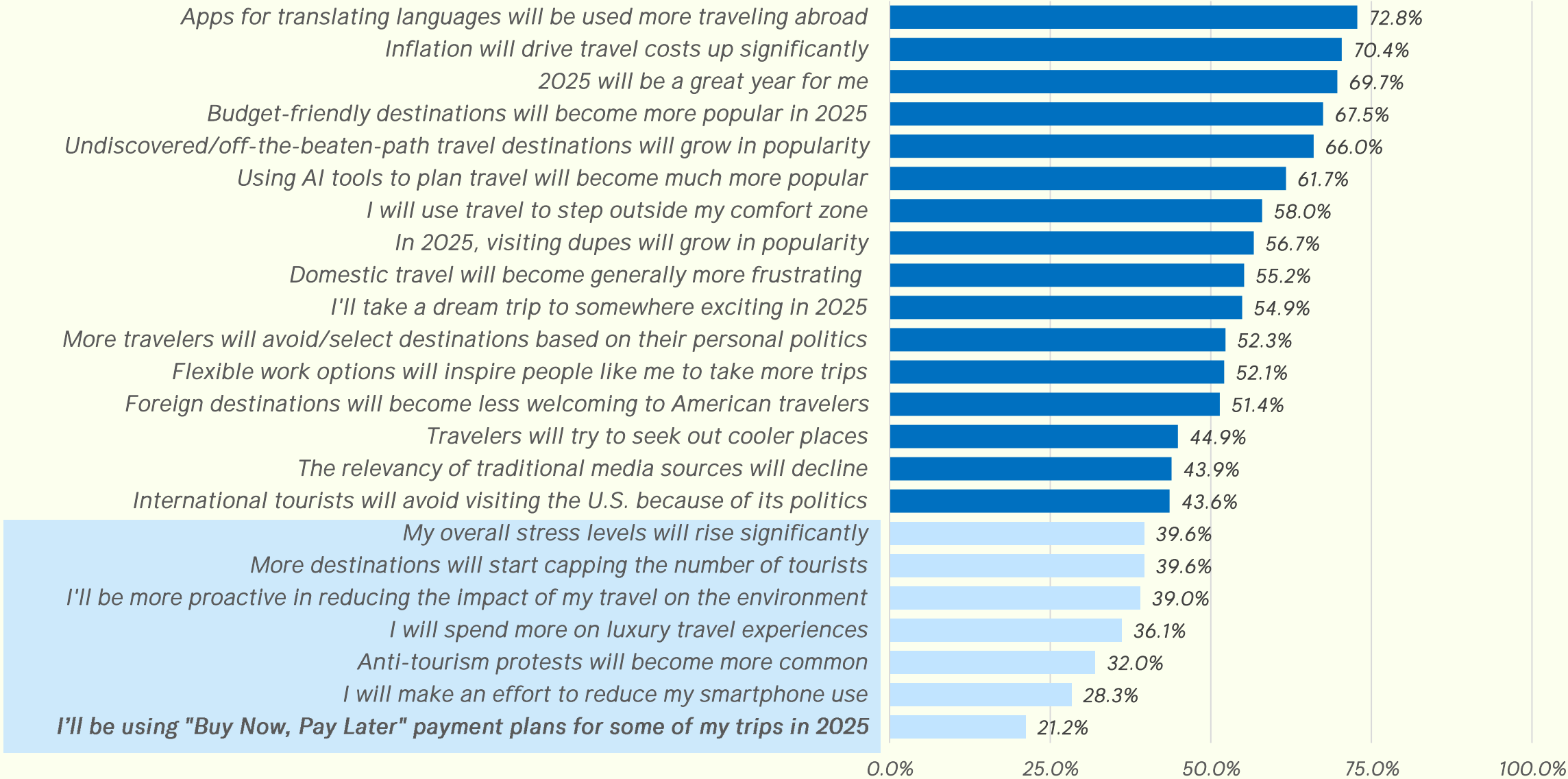
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

A man with short brown hair and a beard, wearing dark sunglasses and a dark bomber jacket over a black button-down shirt, stands on a city street. He is smiling and holding a white coffee cup in his right hand. A grey strap is visible over his left shoulder. The background is a blurred city street with cars and buildings, with warm sunlight filtering through the trees on the right.

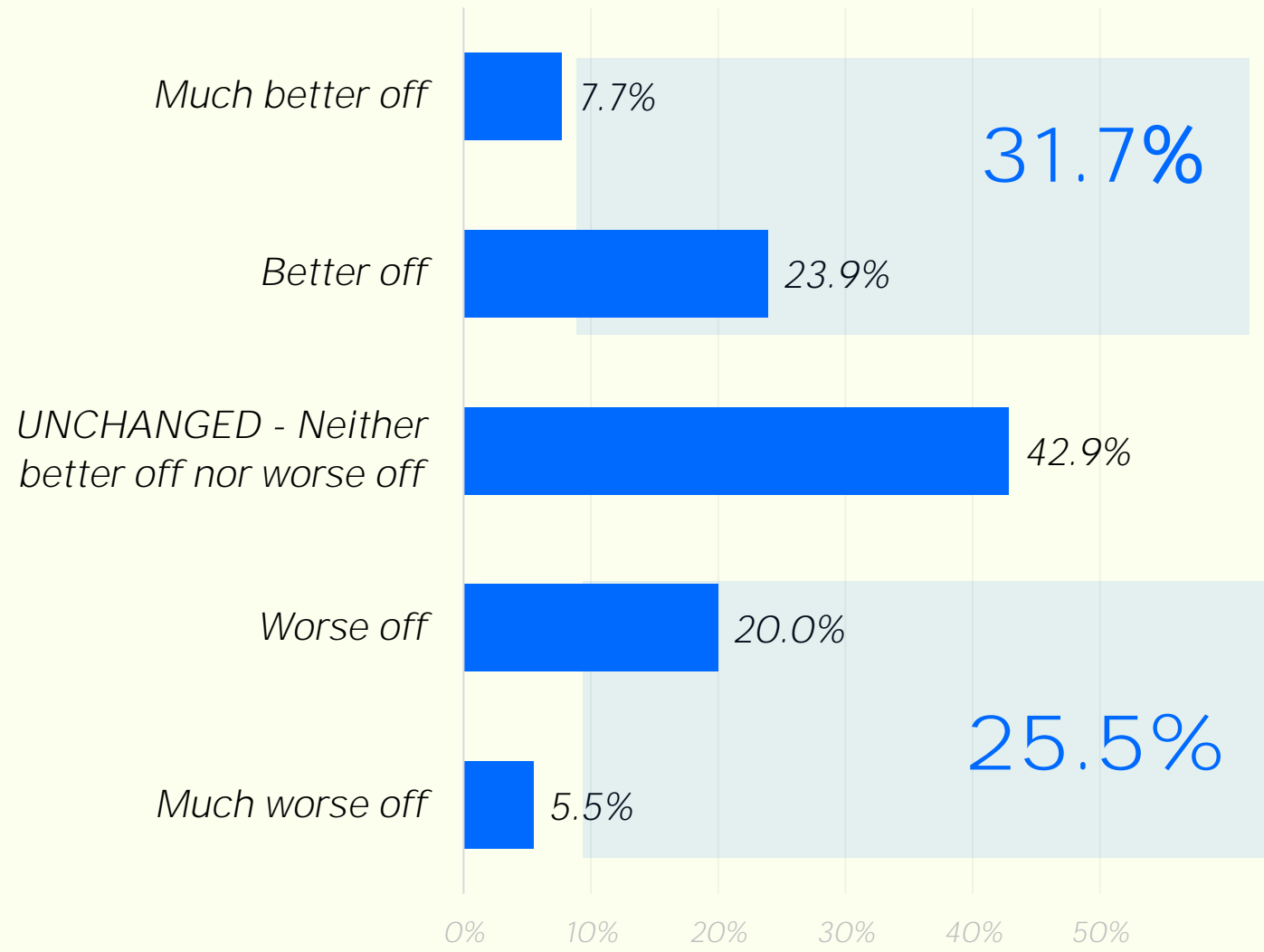
Traveler Sentiment

The year is beginning with a healthy dose of traveler positivity.



Travelers' feelings about their current finances improved this month.

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



The proportion of travelers feeling “better off financially” bounced back to 32 percent this month.

Question:

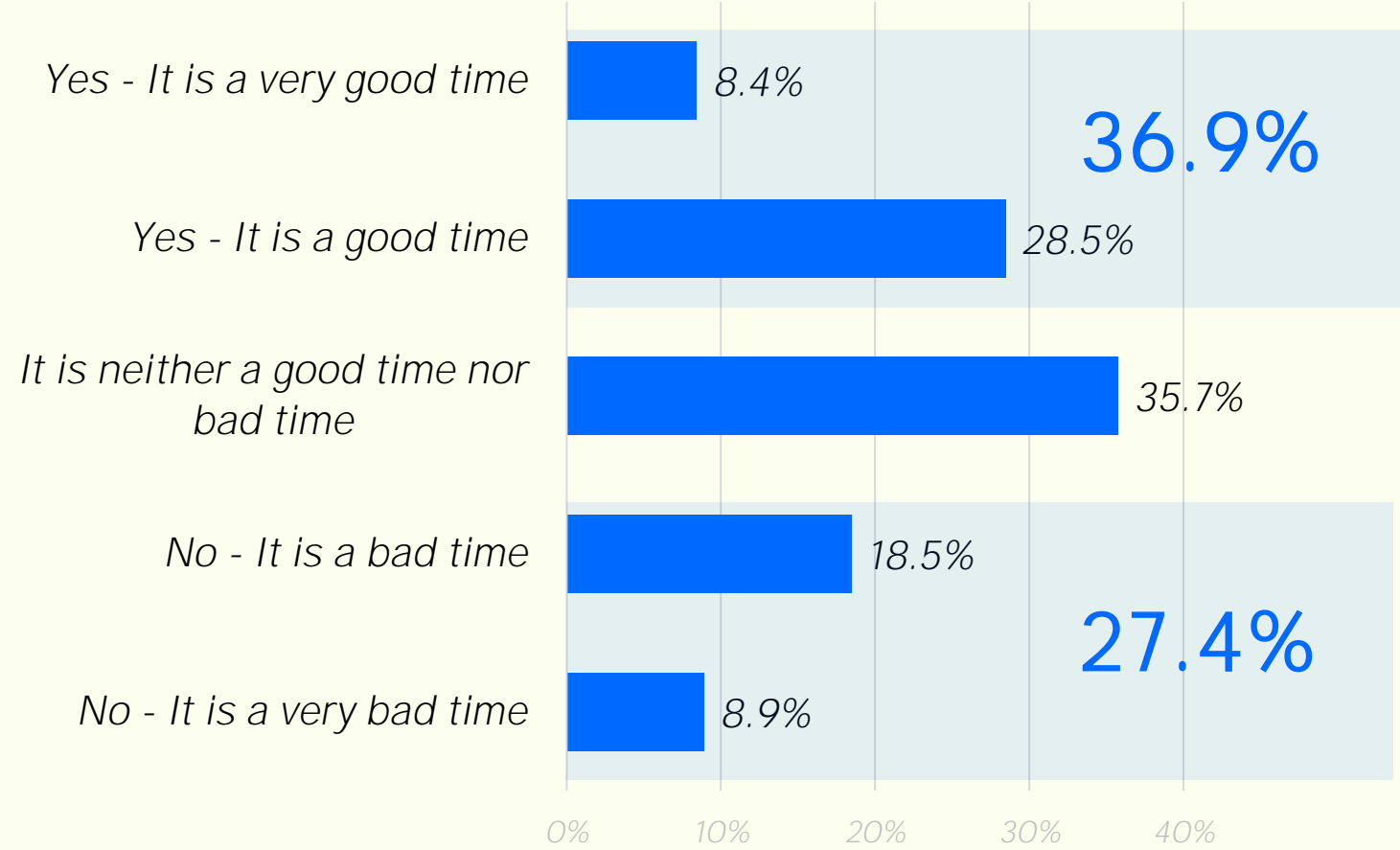
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



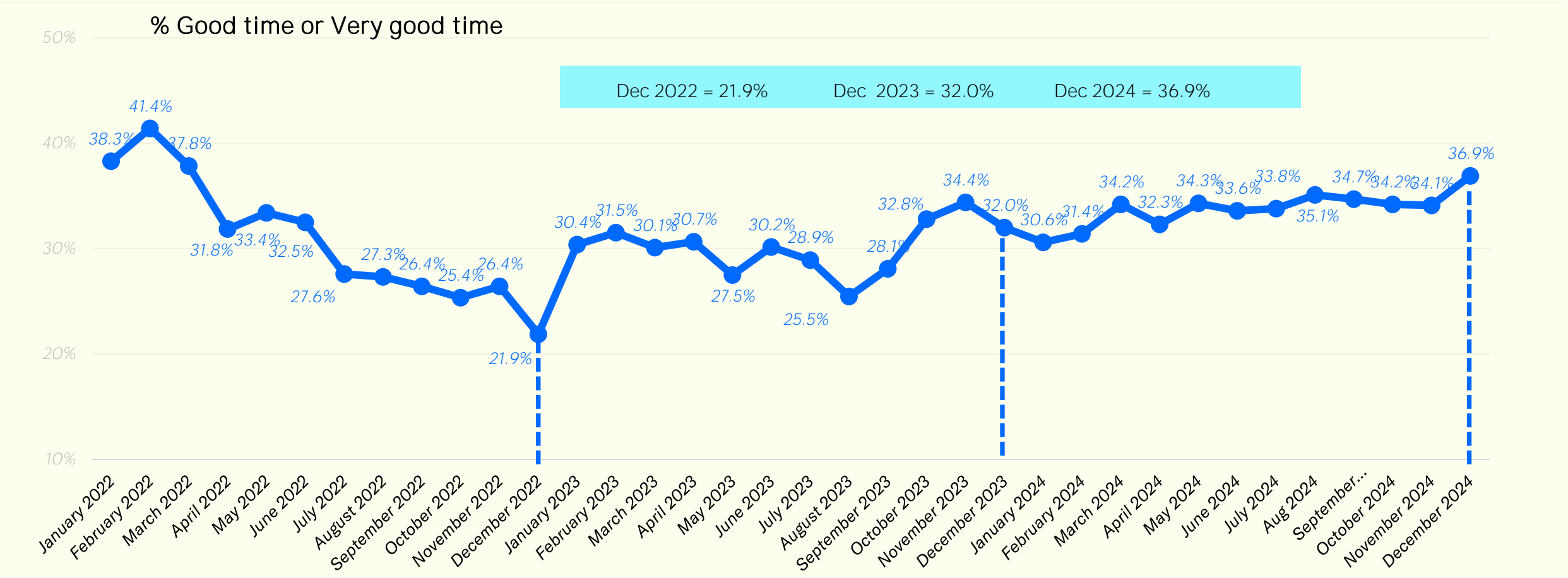
More than one-third of American travelers feel that now is a good time to spend on travel.

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?



This sentiment improved in the last month, reaching a 2-year high.



Looking Forward

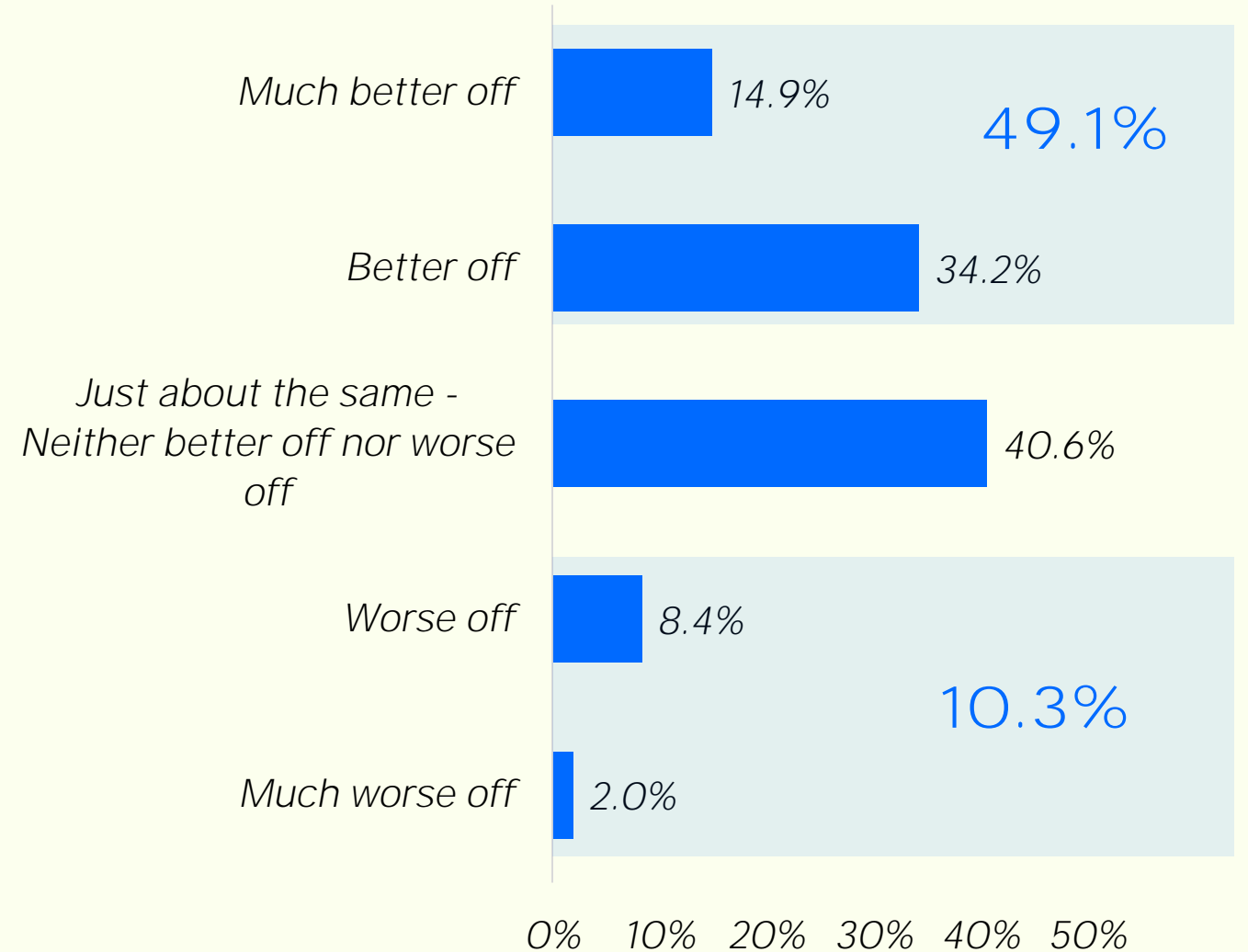
Future Partners



Travelers remain optimistic about their personal financial outlooks.

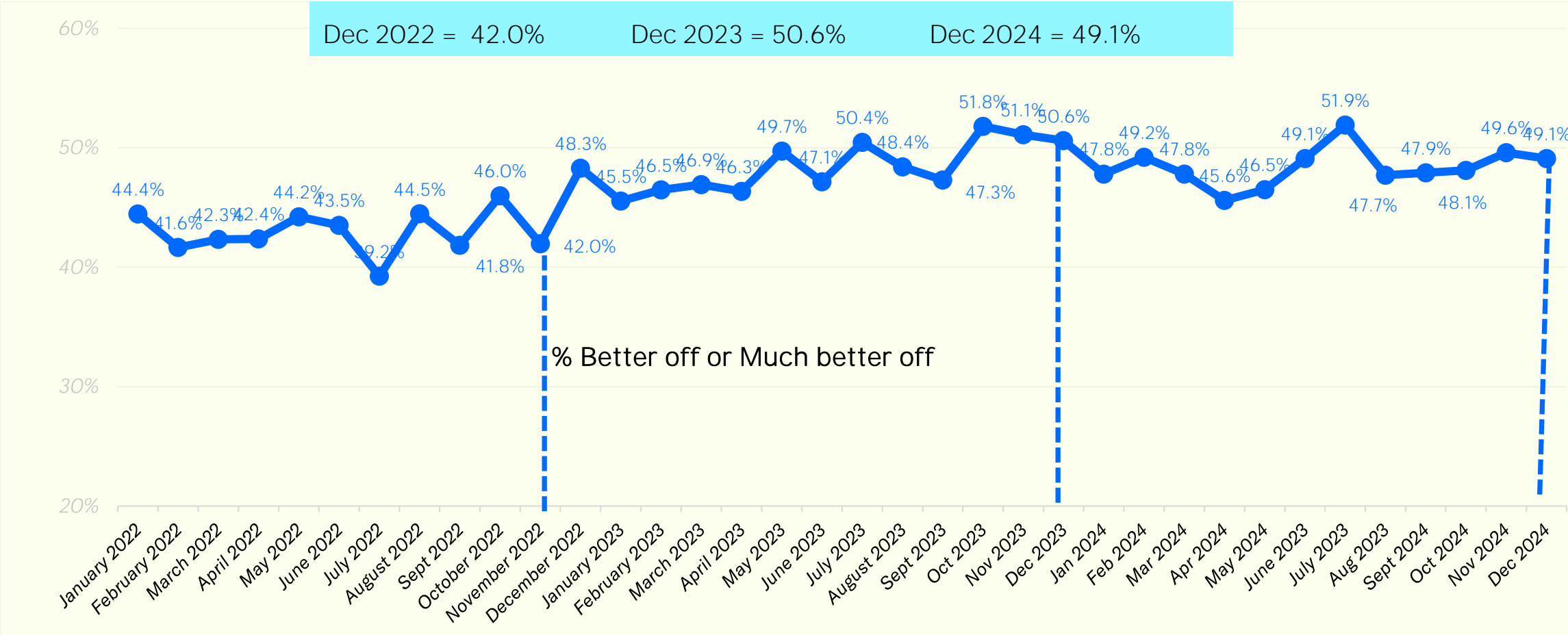
Question:

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?



...a sentiment that changed very little this month.

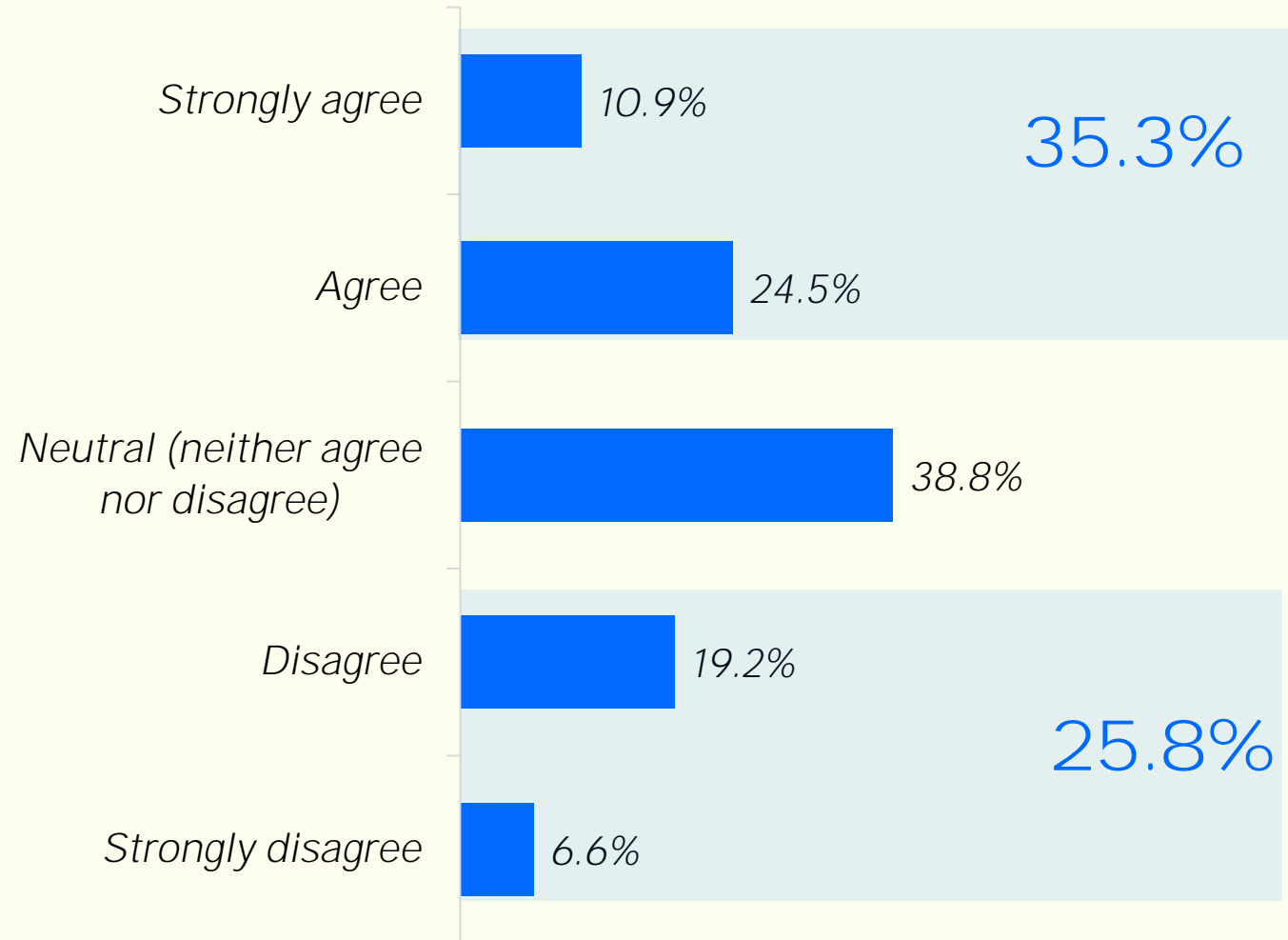
Question:
LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Recessionary concerns have lessened. Now only about 1-in-3 travelers expect and impending recession.

Question:

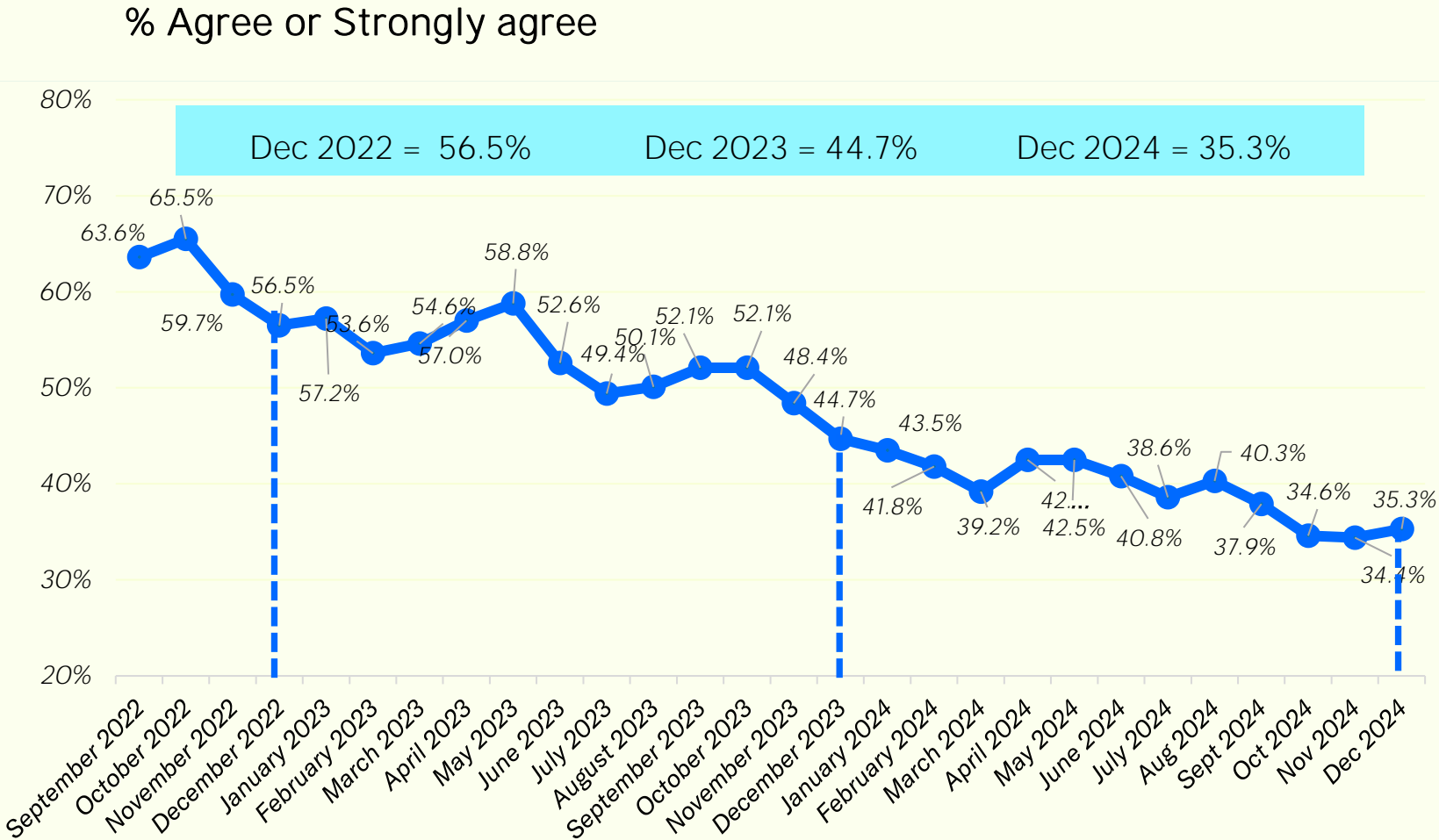
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Concerns of an economic contraction are historically low for post-pandemic period.

Statement:

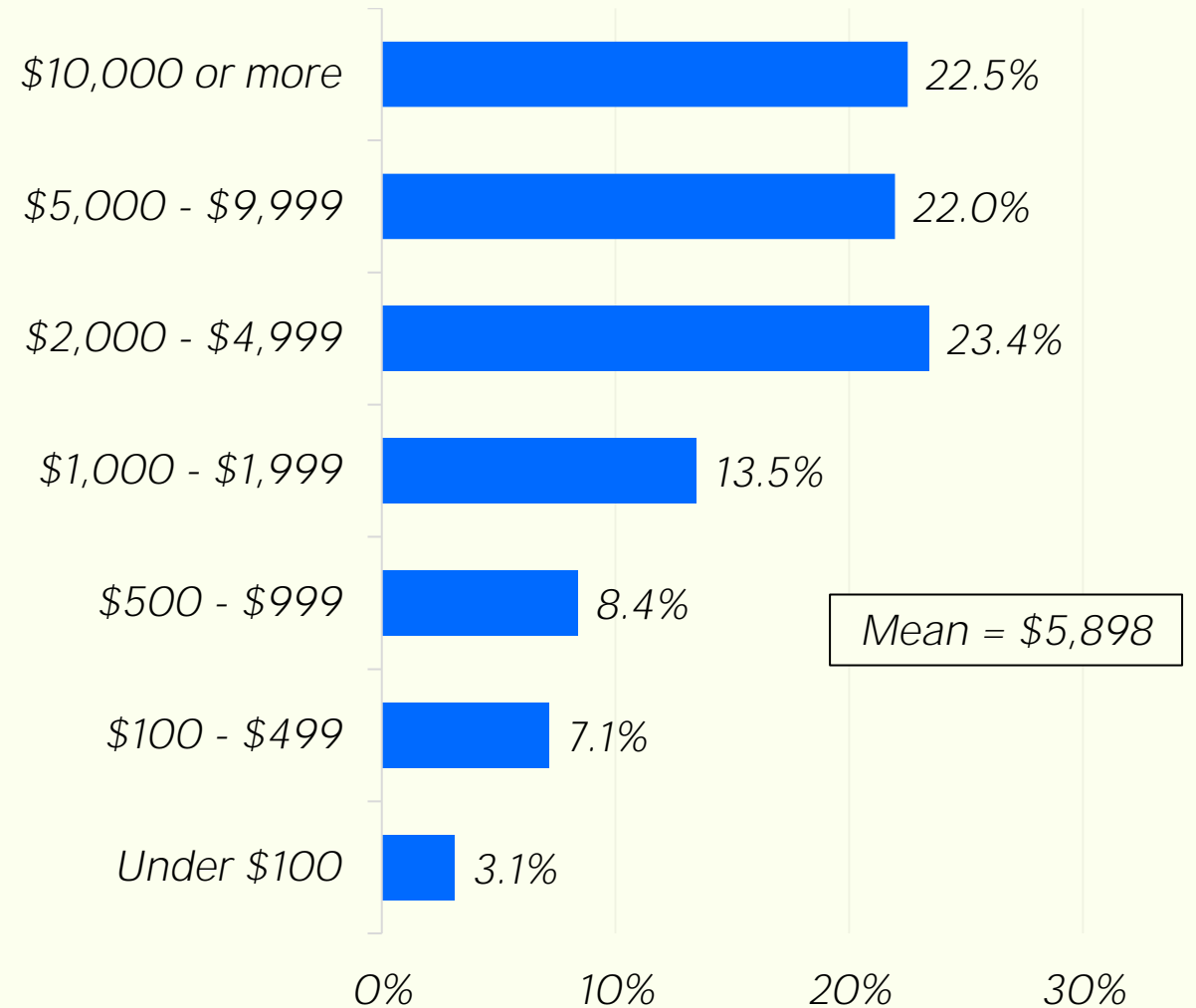
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Expected travel budgets were strong again this month.

Question:

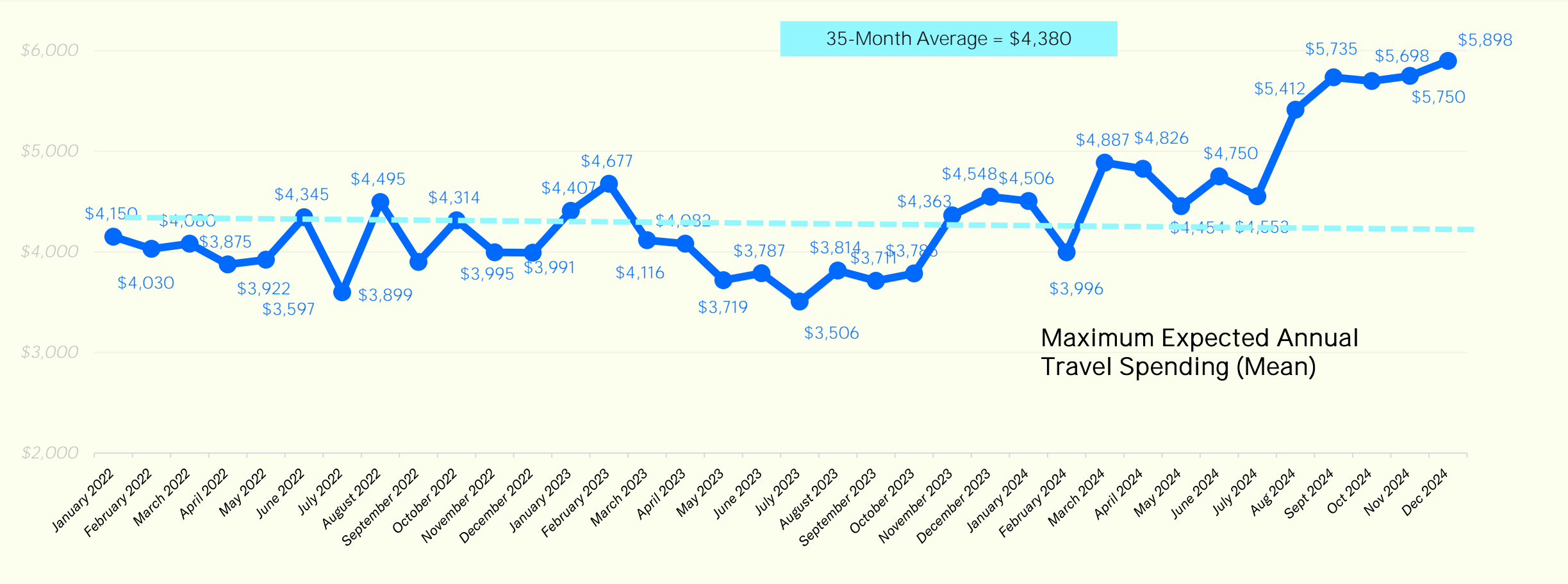
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?



Expected travel budgets continue to trend upward.

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):

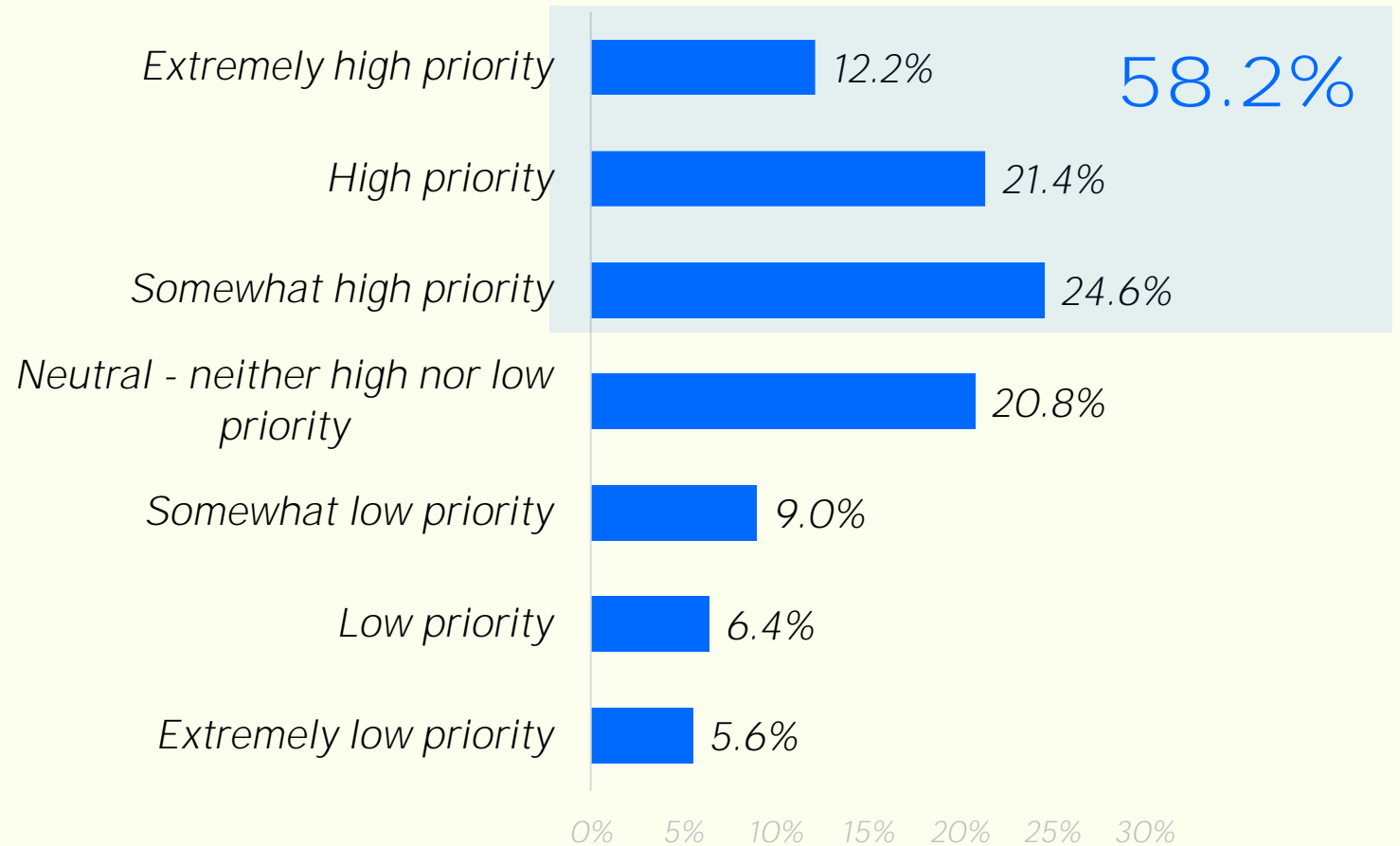


A majority of American travelers intend to make leisure travel a spending priority in the next three months.

Question:

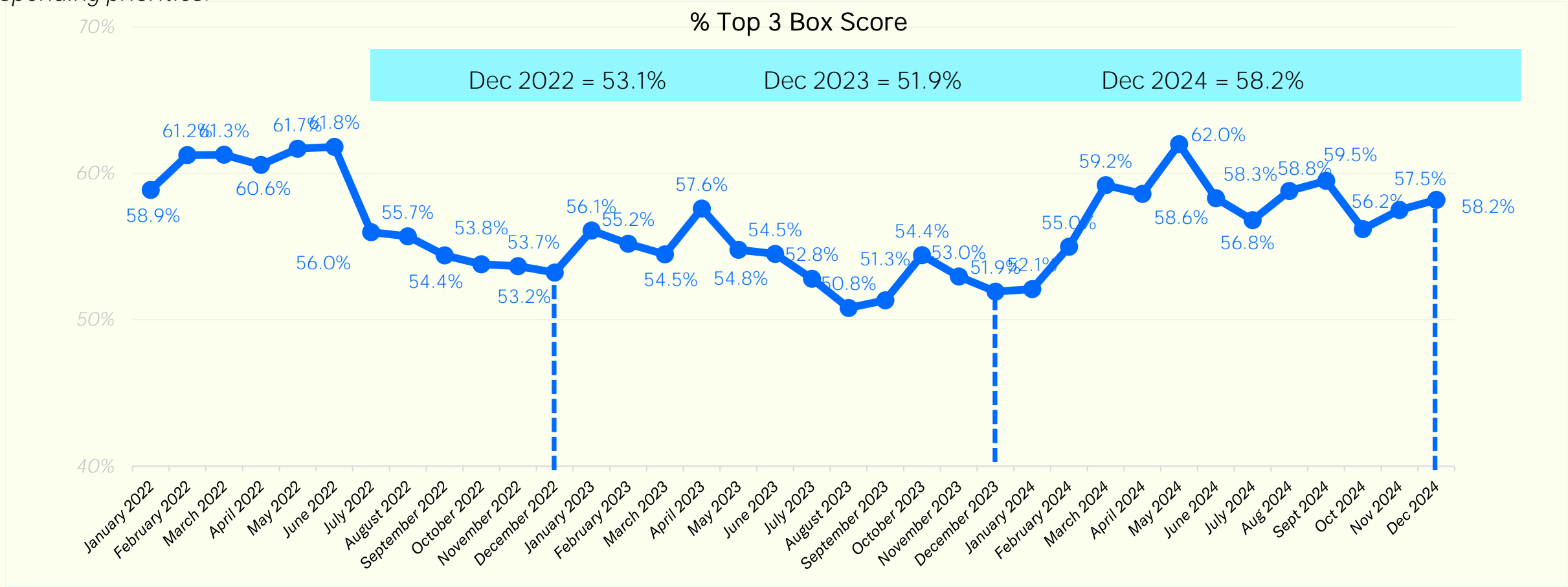
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n) _____.



This metric has grown for two months and is above the last two years.

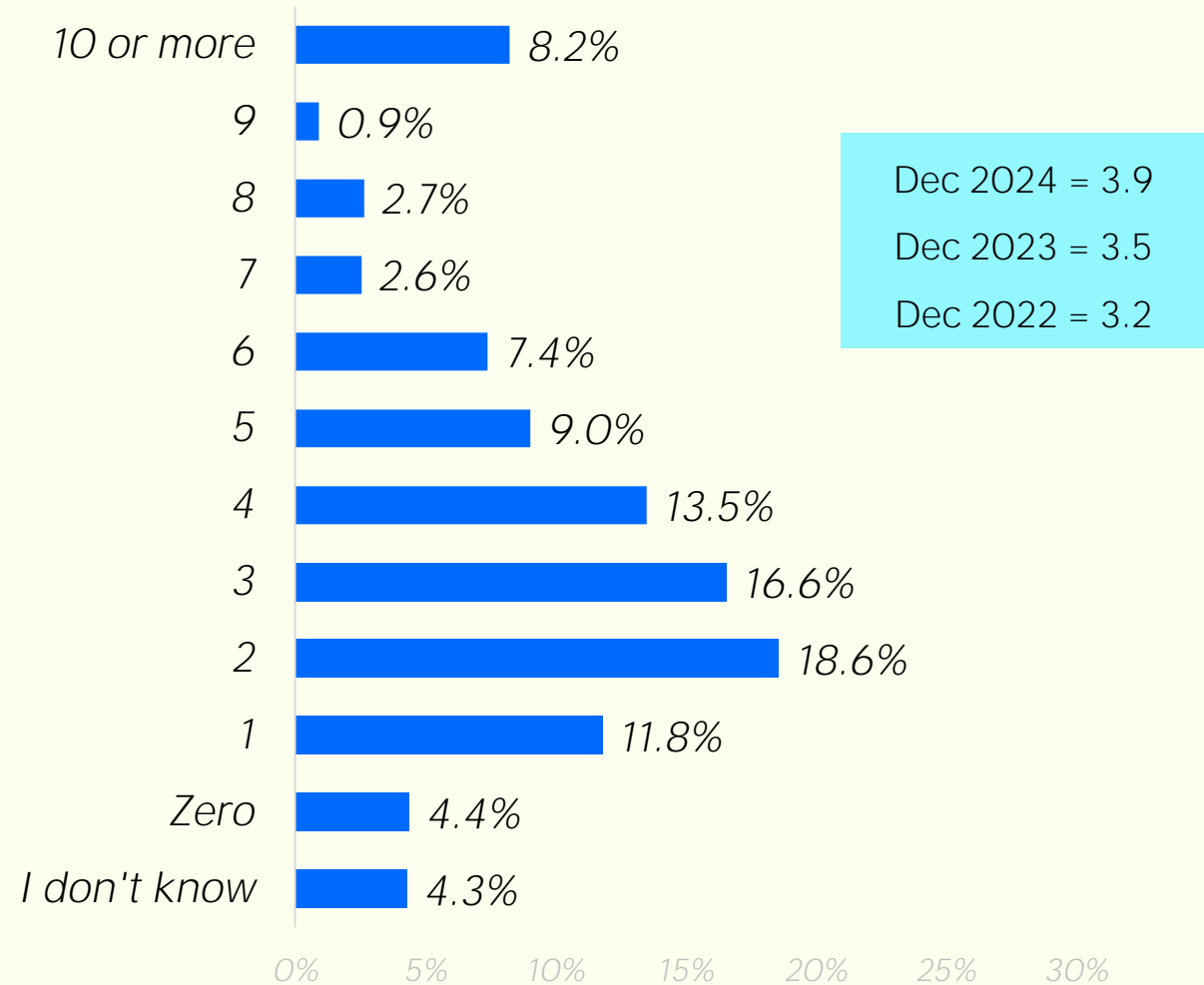
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



The expected number of trips Americans plan to take has grown.

Question:

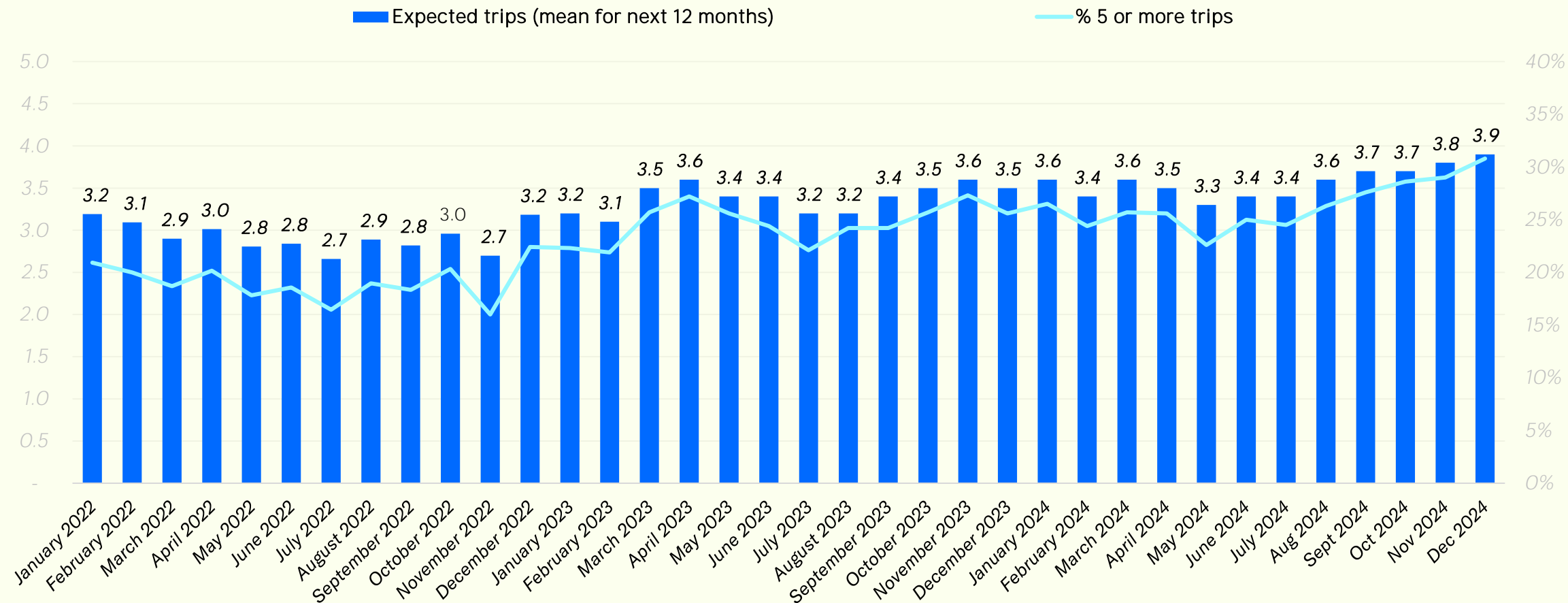
*IN TOTAL, how many leisure trips
(of 50 miles or more from your
home) do you expect to take
in NEXT TWELVE (12) MONTHS?*



Travel expectations are also at record high levels.

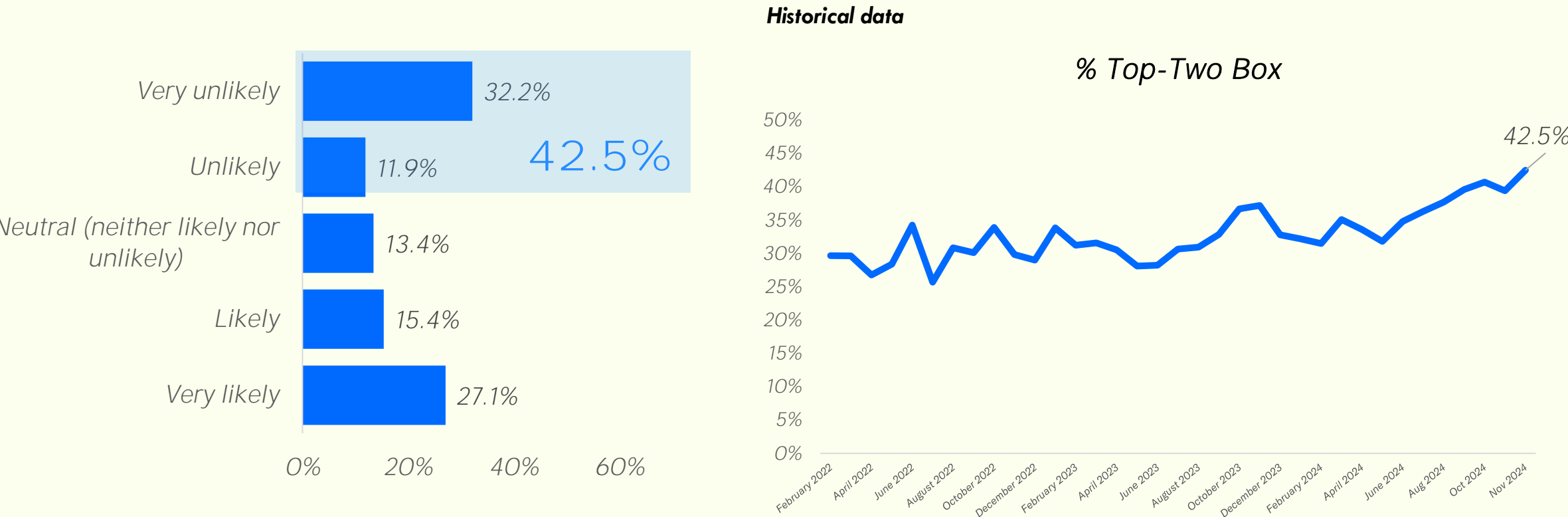
Question:

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



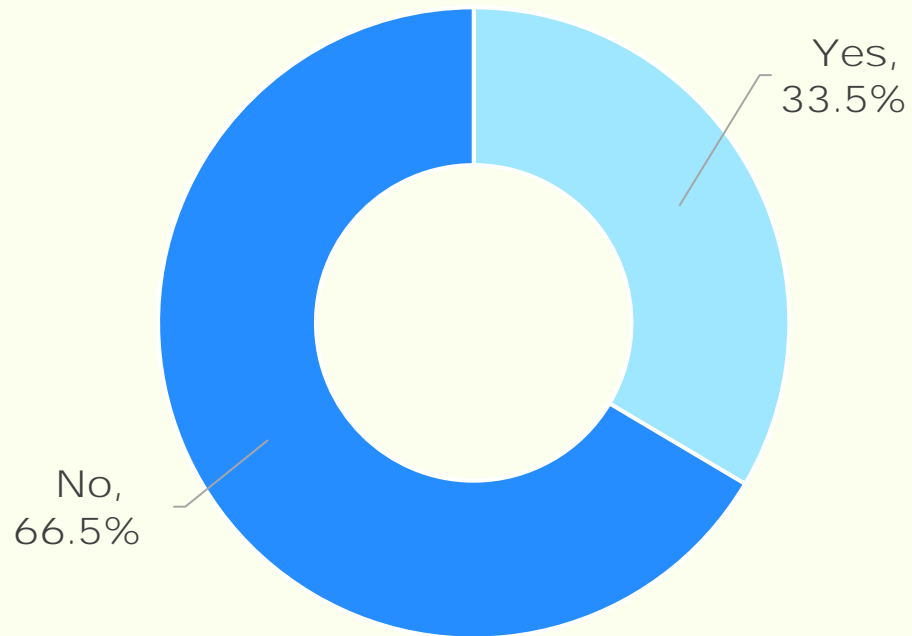
Expectations to travel abroad in the next year continue to grow.

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

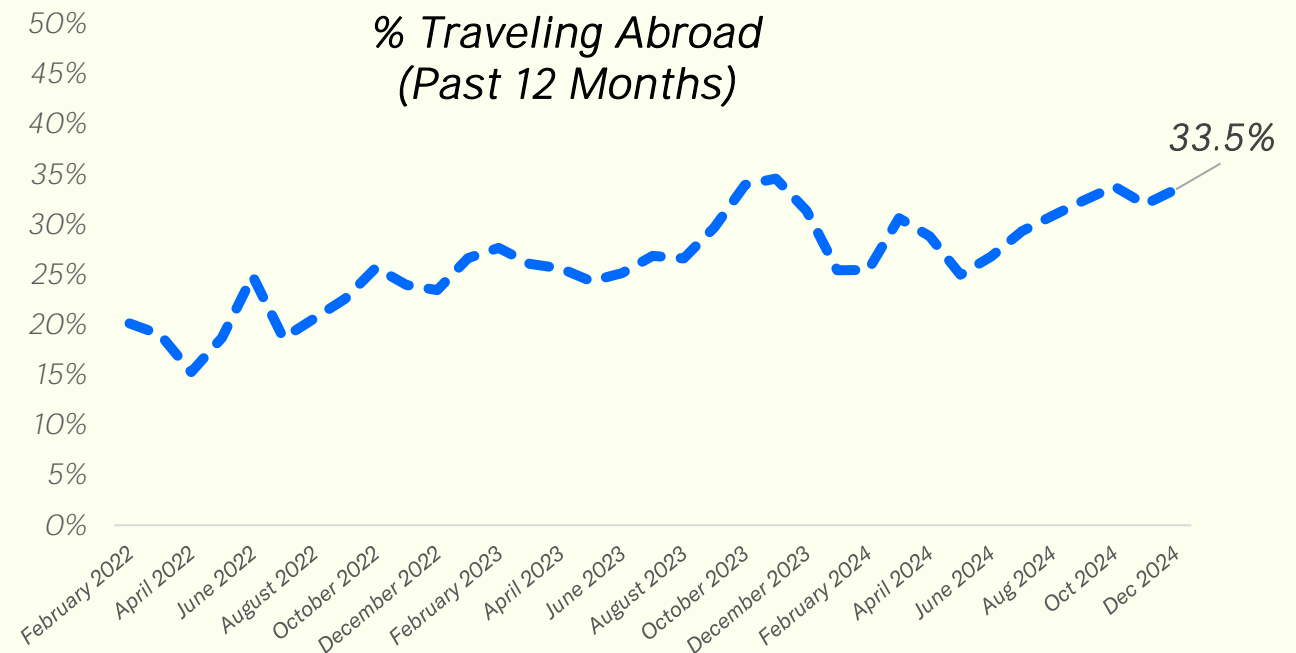


International travel rates also rose again.

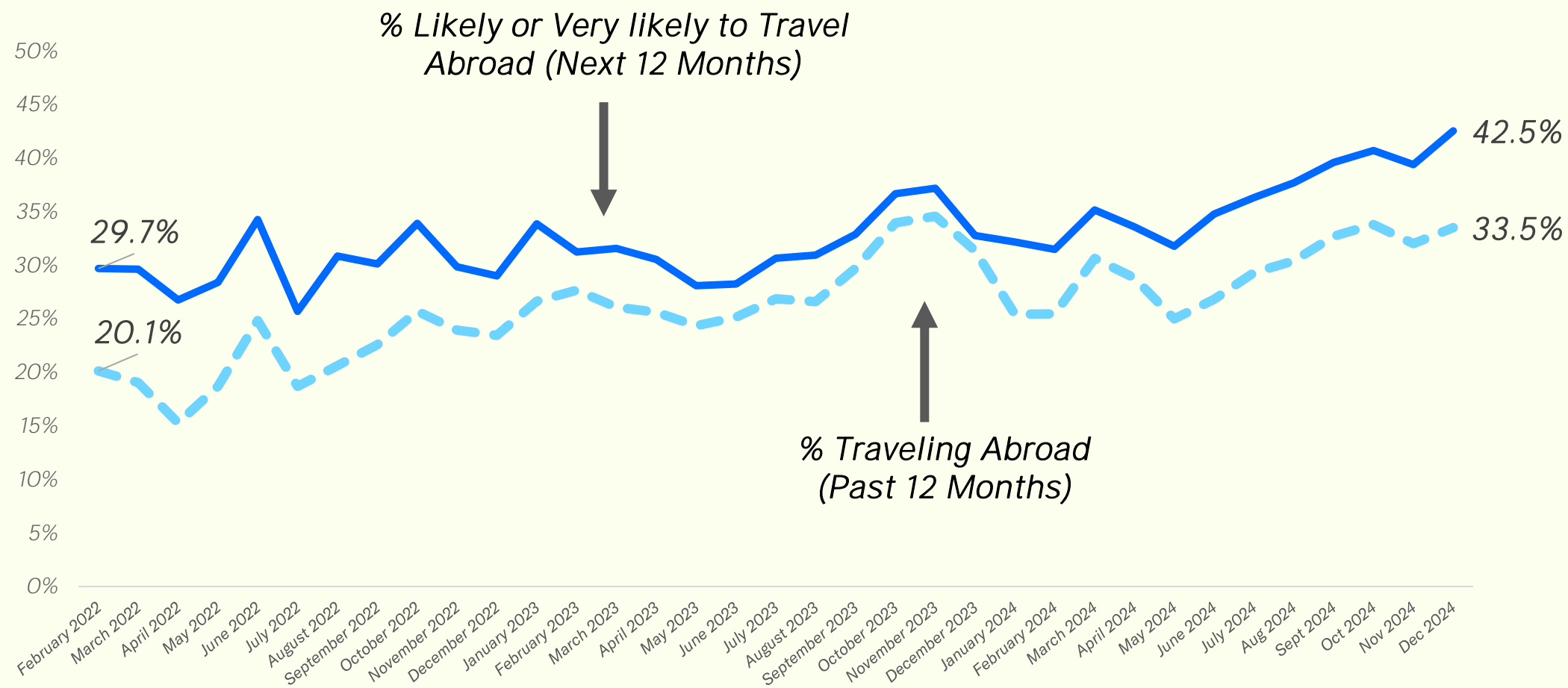
Question: *In the PAST 12 MONTHS, have you traveled outside the United States?*



Historical data

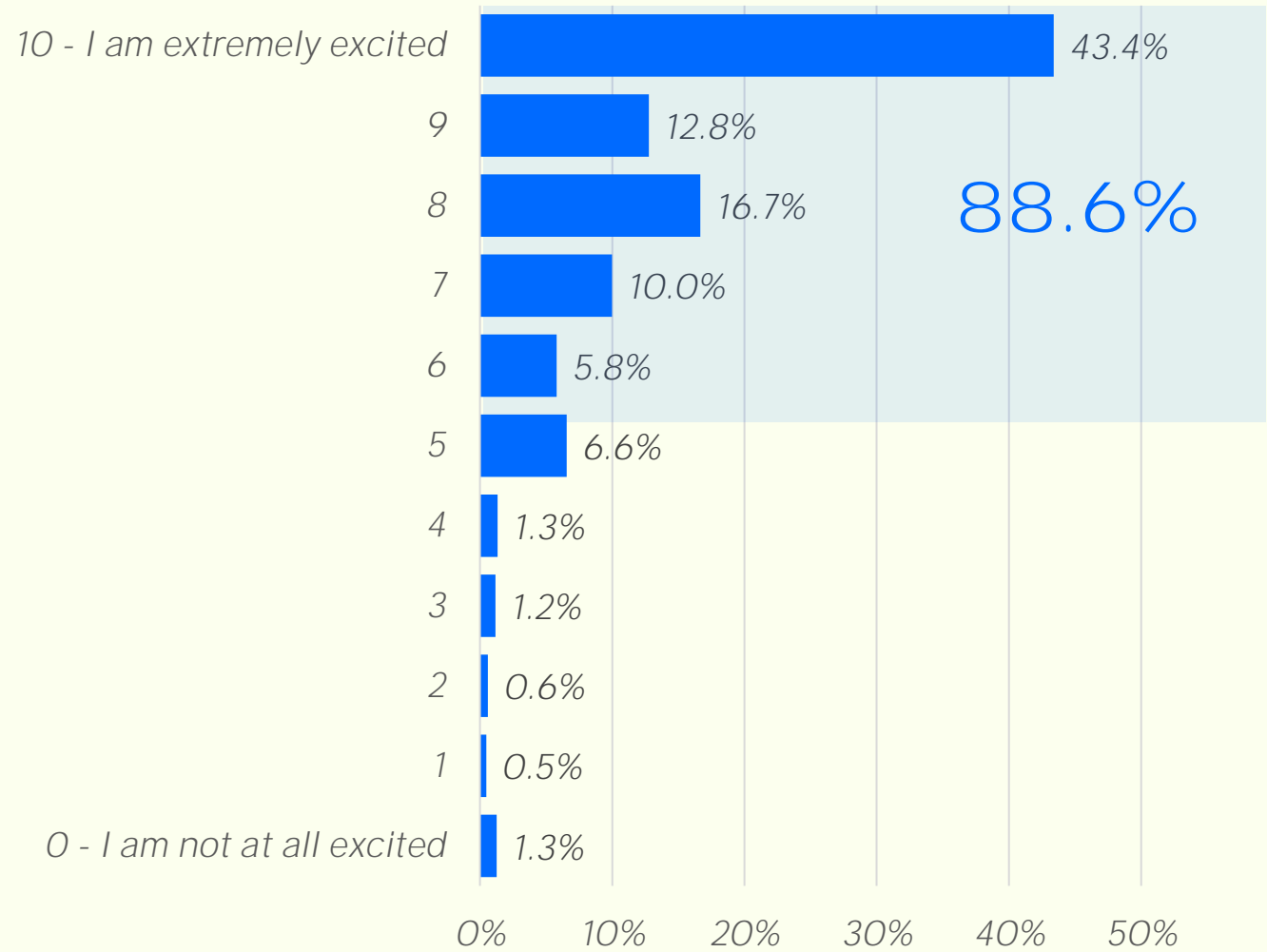


Likelihood to travel abroad and actual international travel are well-aligned.



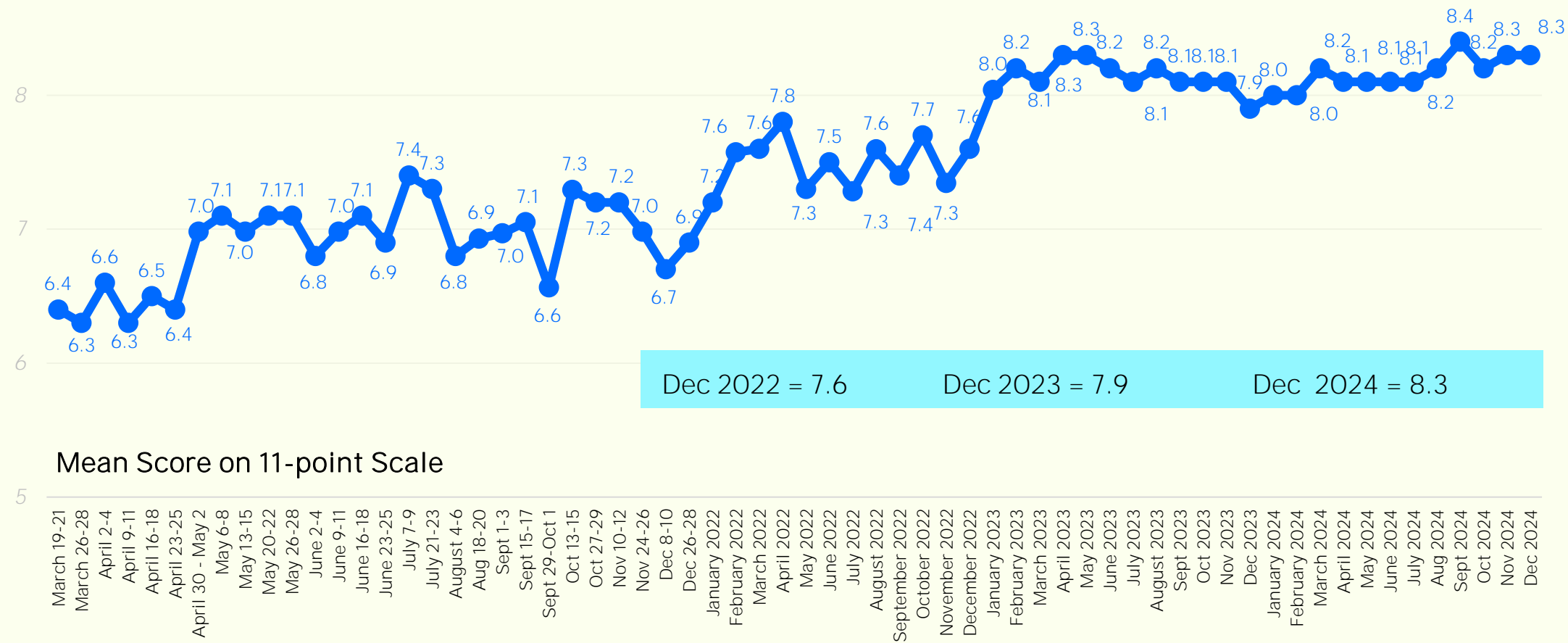
Energized: Nearly 90% of American travelers register high excitement levels for travel

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 travel remains at record levels.

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



Sentiment Indices

Future Partners



Travel Sentiment Indices

A tool to better understand the big picture by bringing all these data points together. Index values are calculated by combining key questions.

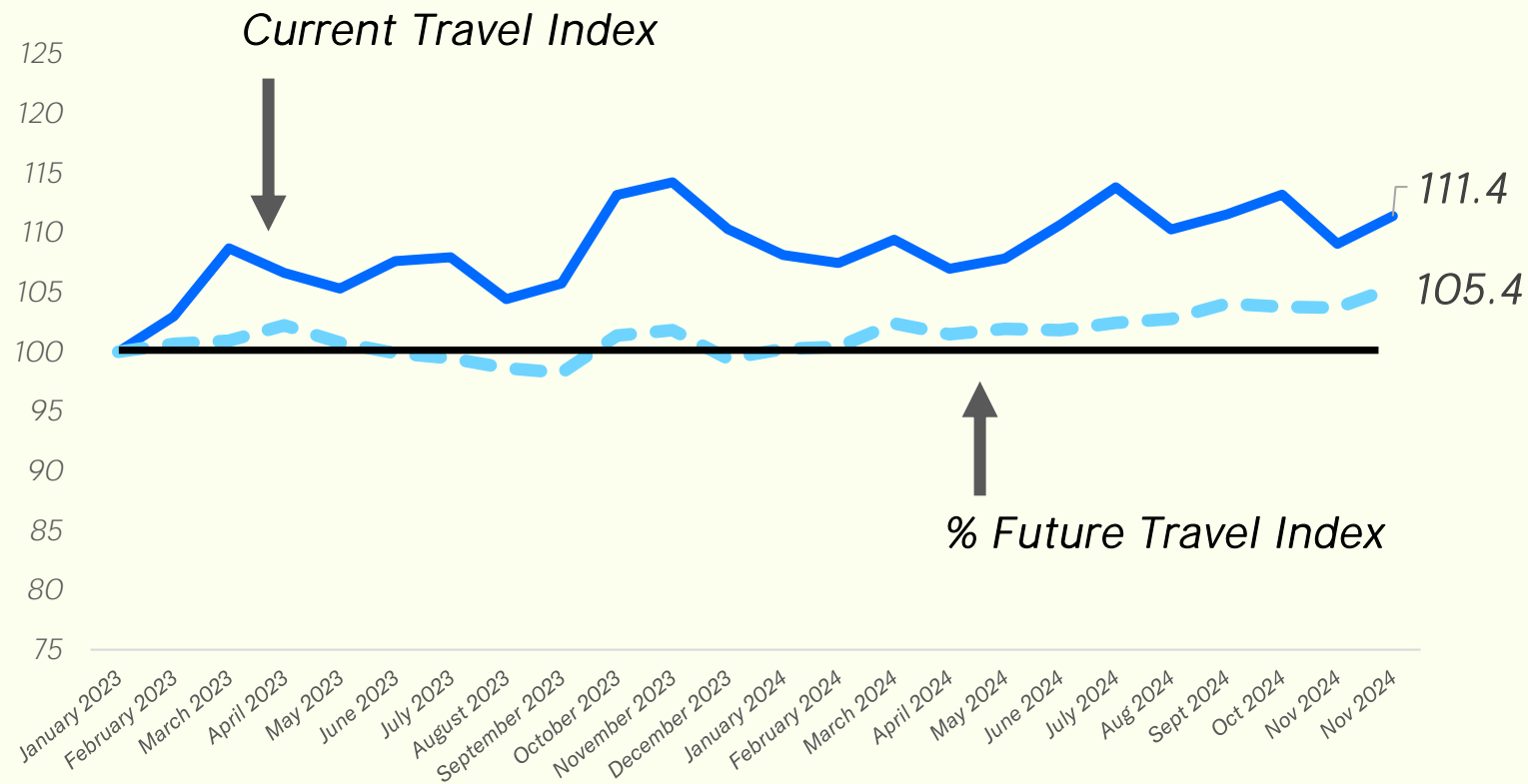
Current Travel Sentiment Index

- Current financial situation
- Now is a good time to spend on travel
- Travel prices restricting travel now
- Overnight trips taken in the past month
- Day trips taken in the past month

Future Travel Sentiment Index

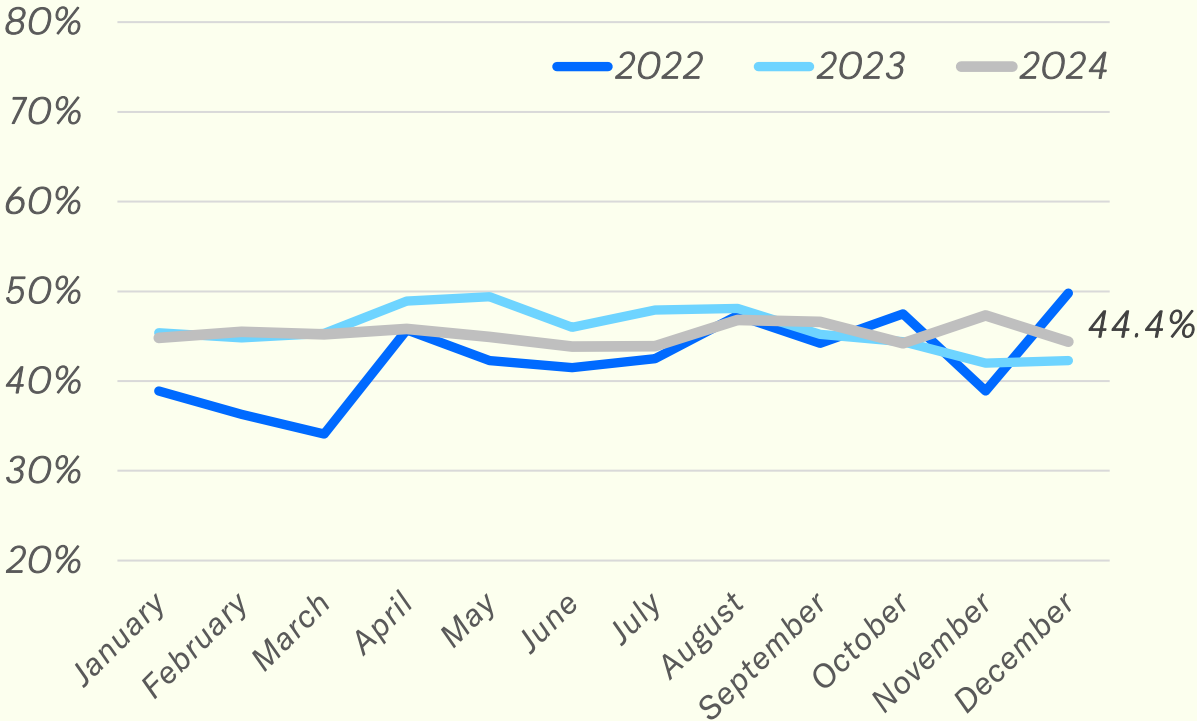
- Personal financial outlook (next 12 months)
- Travel spending as a future budget priority
- Excitement to travel (next 12 months)
- Expected leisure trips (next 12 months)

Both current and future sentiment indices progressed this month.



Day dreaming about travel is a national pastime.

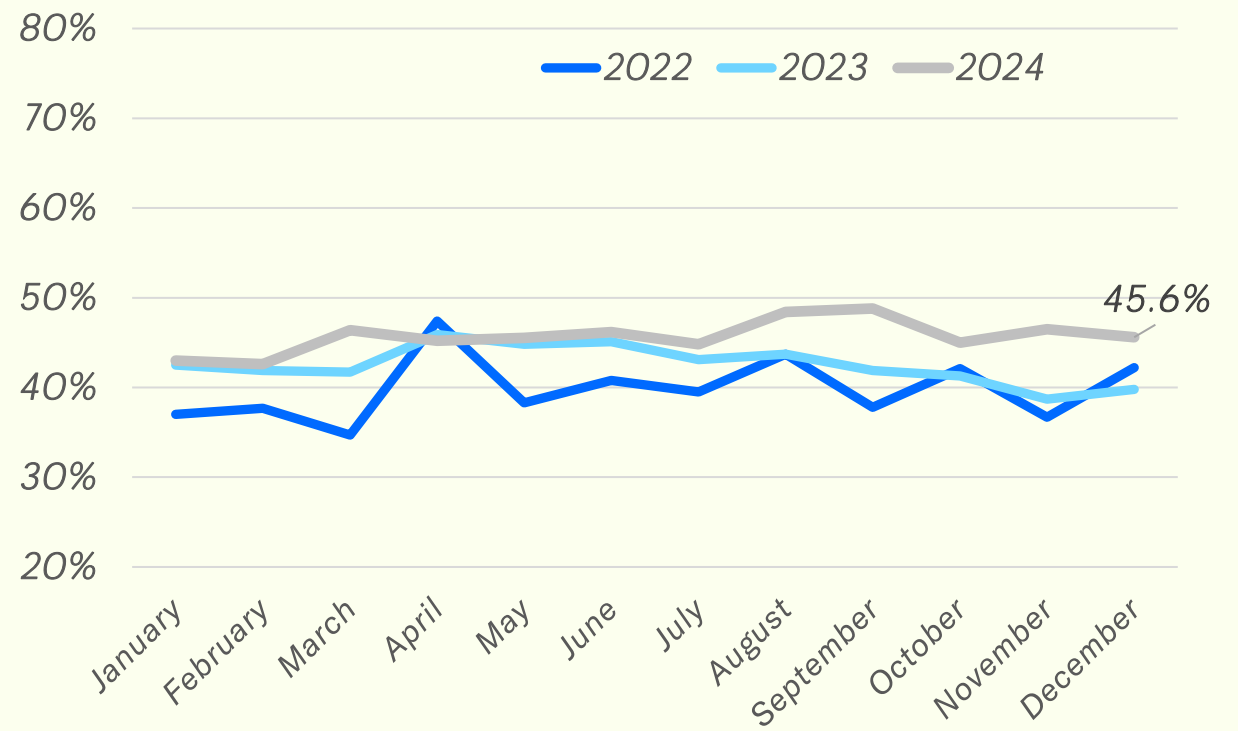
Day-dreamed about travel in the past week
(% of all American Travelers)





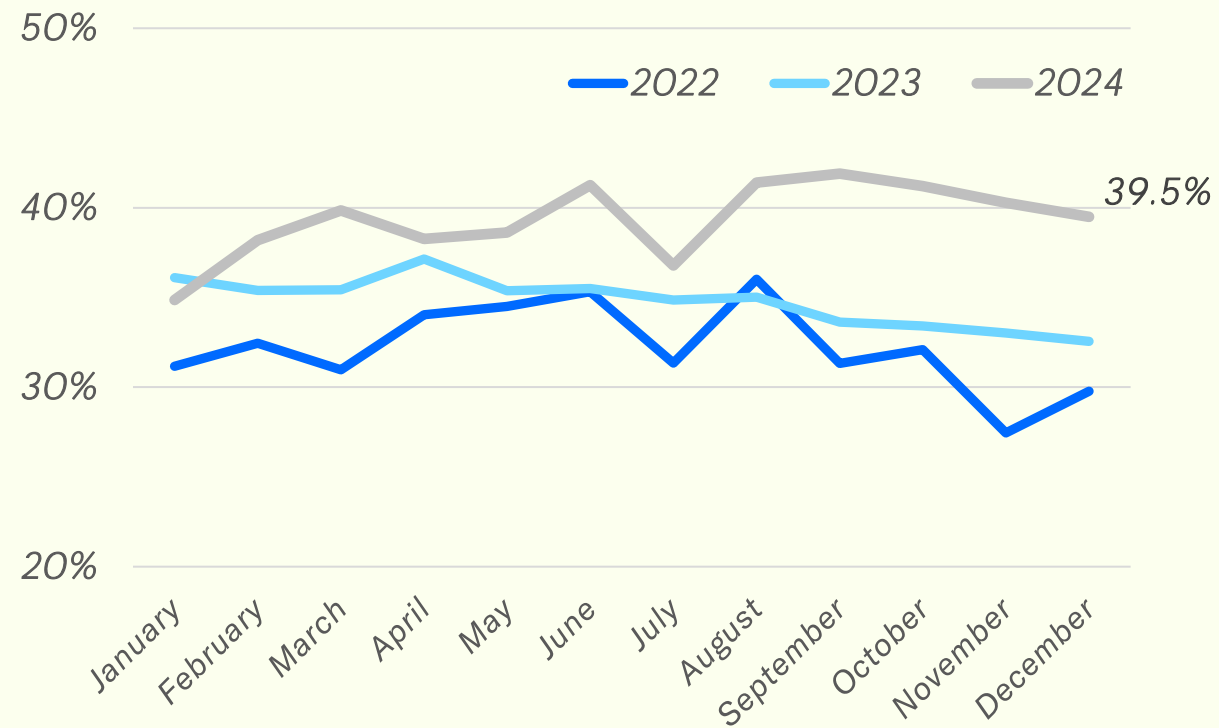
Talking about trips with friends is at a record high level.

Talked with a friend about a future trip in the past week
(% of all American Travelers)



Online research is thriving right now.

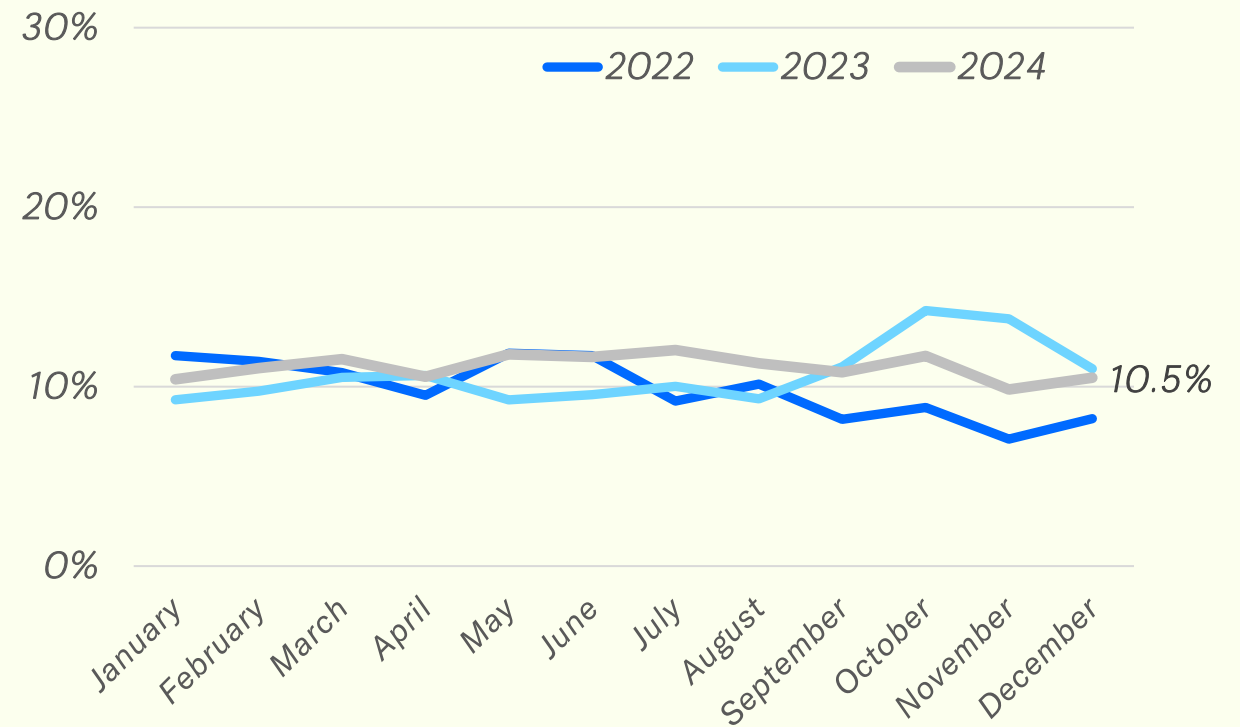
Researched about travel online in the past week
(% of all American Travelers)





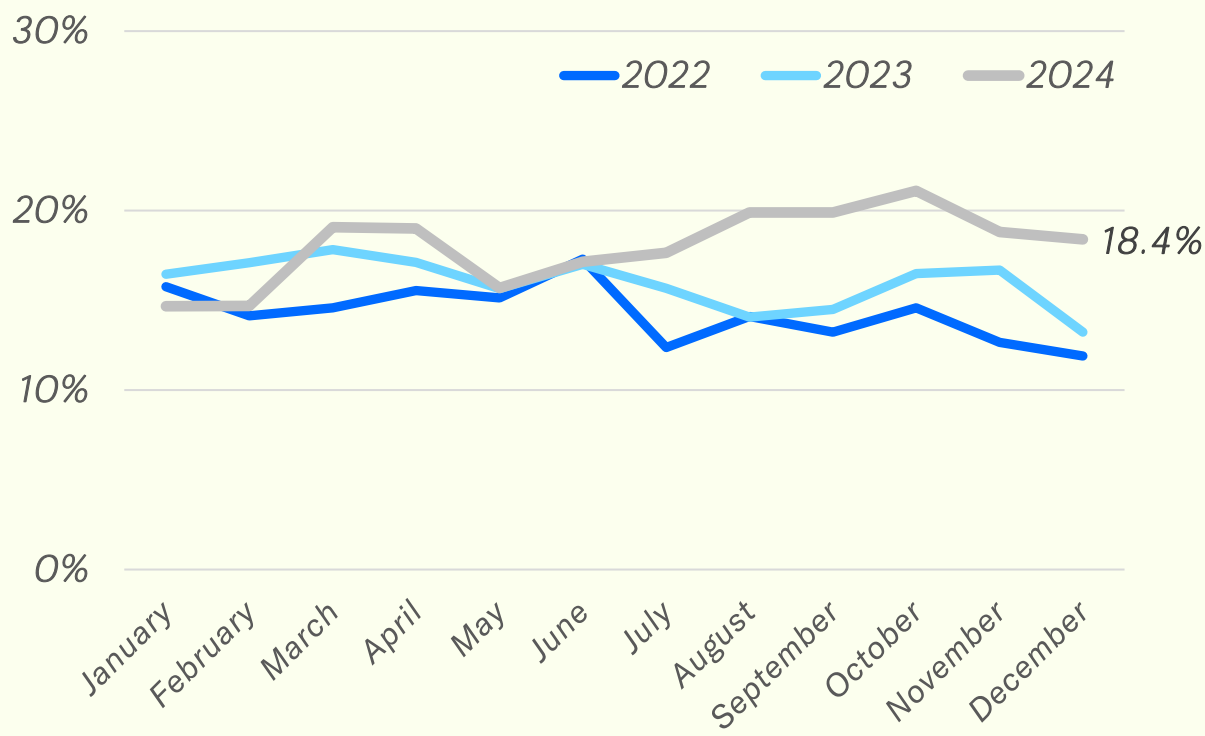
1-in-10 researched travel ideas offline

Researched offline in the past week
(% of all American Travelers)



Booking continues to be up significantly from this time last year

Made travel reservations in the past week
(% of all American Travelers)

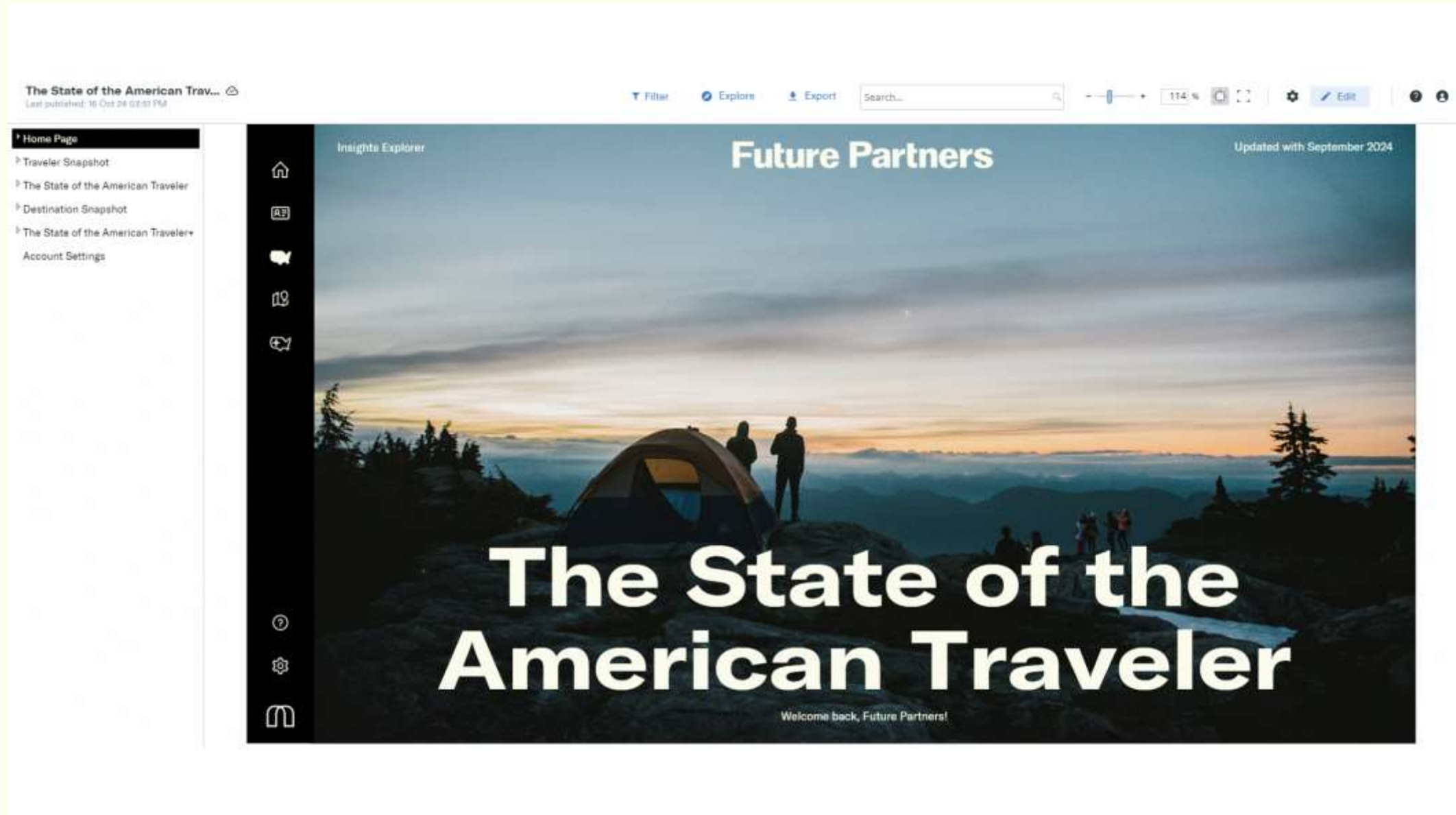


Current travel sentiment improved slightly this month, and optimism remains solid as we move into the new year.

- Travel budgets are strong
- Excitement to travel is at near record levels
- The expected number of future trips is growing
- Travel booking activity remains high



The State of the American Traveler Insights Explorer Dashboard: [Subscribe Today!](#)



Grow Your Share of International Inbound Visitation with *The State of the International Traveler*

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



[instagram.com/futurepartners.tourism/](https://www.instagram.com/futurepartners.tourism/)



Info@futurepartners.com



[Linkedin.com/company/futurepartners](https://www.linkedin.com/company/futurepartners)



[Livestream Calendar](#)