

# Future Partners

## The State of the American Traveler

April 2025

# Today

- Travel Sentiment Overview
- Travel Red Flags and Green Flags
- Industry Perspective on International Marketing

*May Livestream  
Registration*



Presentation deck and recording will be available on our website:

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

*May Livestream  
Registration*





# 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 [March 17-26](#)*
- *Confidence interval of +/- 1.55%*
- *Data is weighted to reflect the actual population of each region*

*United States Census Regions*



# Traveler Sentiment



## **Fear That Trump Tariffs Will Spark Recession Slashes Billions of Dollars From US Stock Values**

U.S. companies had billions of dollars in value wiped out after President Donald Trump slapped sweeping tariffs on foreign imports

**The Job Market Has Been Resilient. The Trade War Could Be Its Undoing.**

ECONOMY

## **Consumer confidence in where the economy is headed hits 12-year low**

PUBLISHED TUE, MAR 25 2025 10:19 AM EDT | UPDATED TUE, MAR 25 2025 5:34 PM EDT

# The Story of the Data:

- Despite extraordinary recent uncertainty, traveler sentiment remains similar to last year at this time.
- Travelers are bracing for economic trouble, as recession fears are rising fast.
- A significant proportion of travelers say they expect to change their travel buying and behaviors as a result of these concerns.

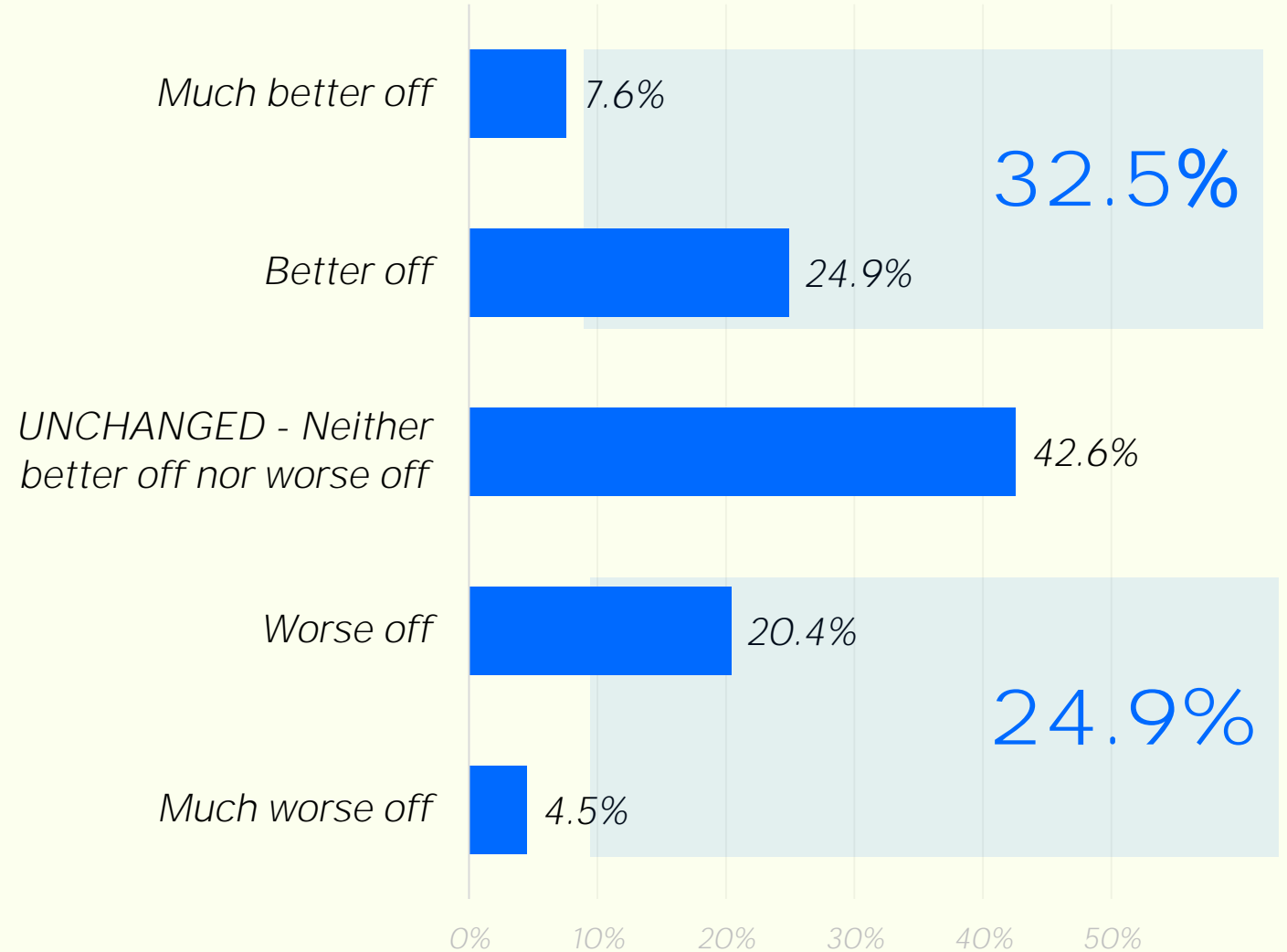
*May Livestream  
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# Travelers' assessment of their current financial situation held constant this month.

Question:

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

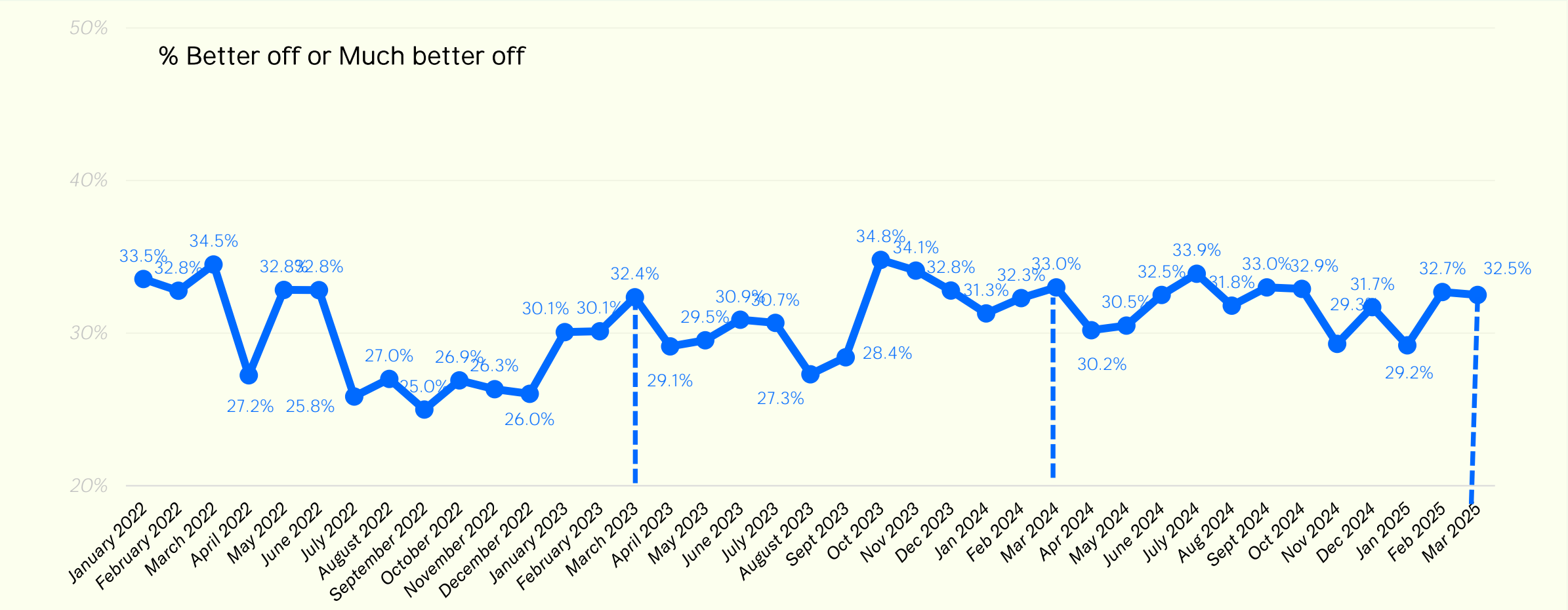




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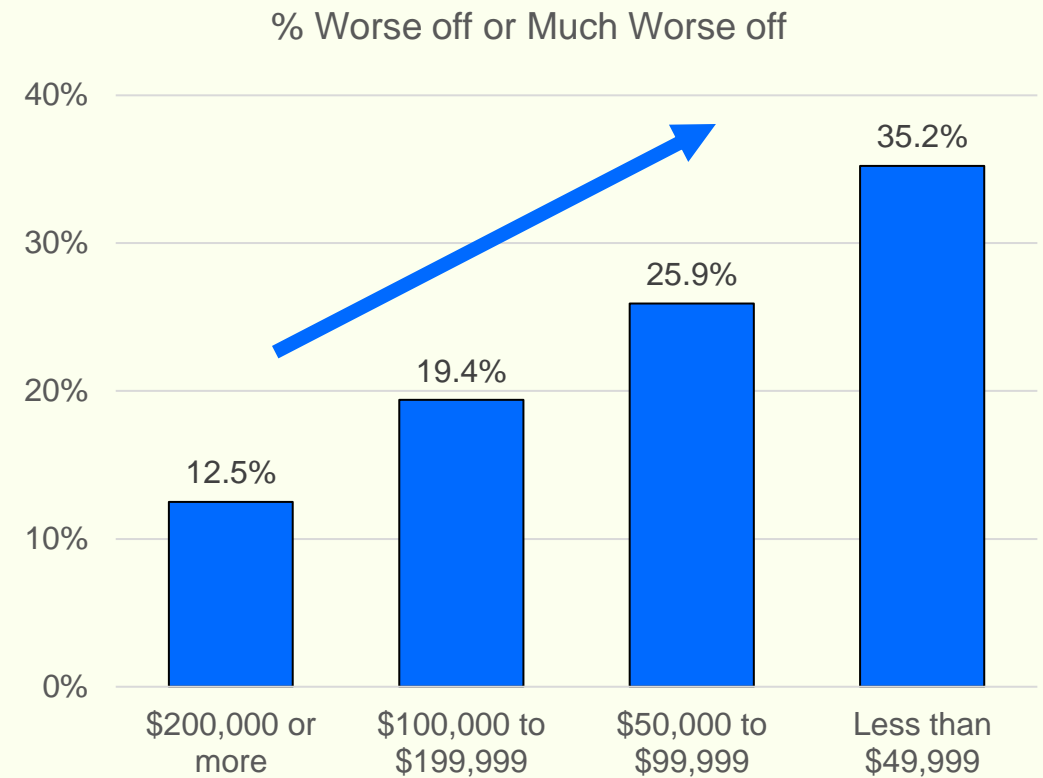
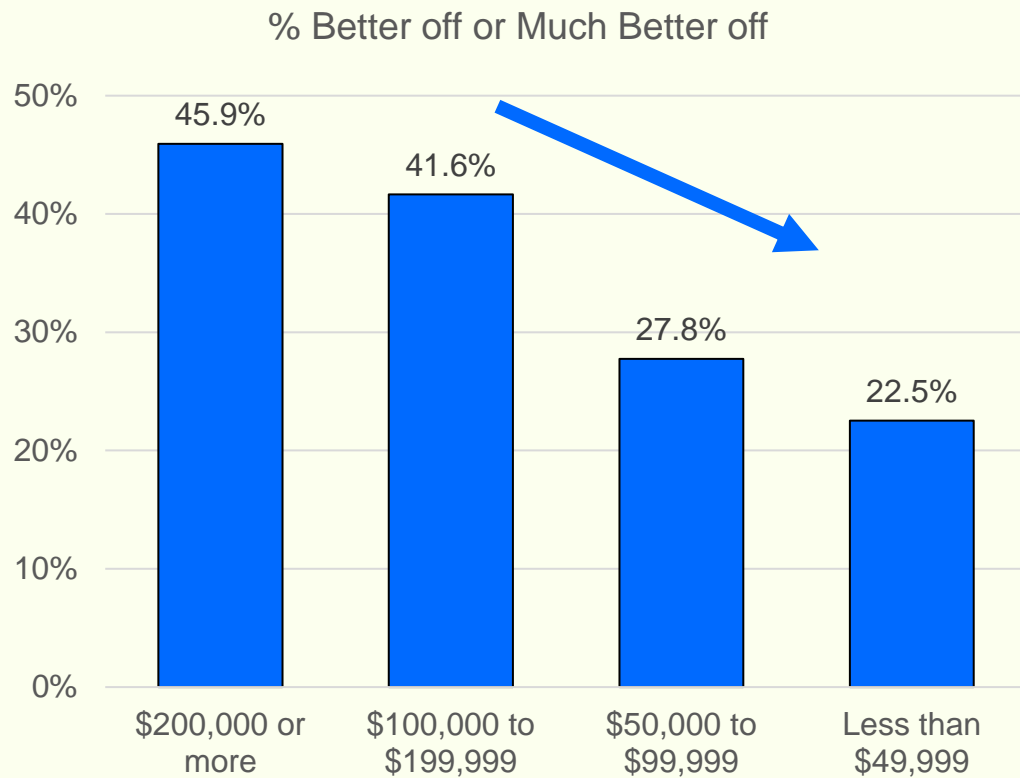
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# Affluent travelers versus others

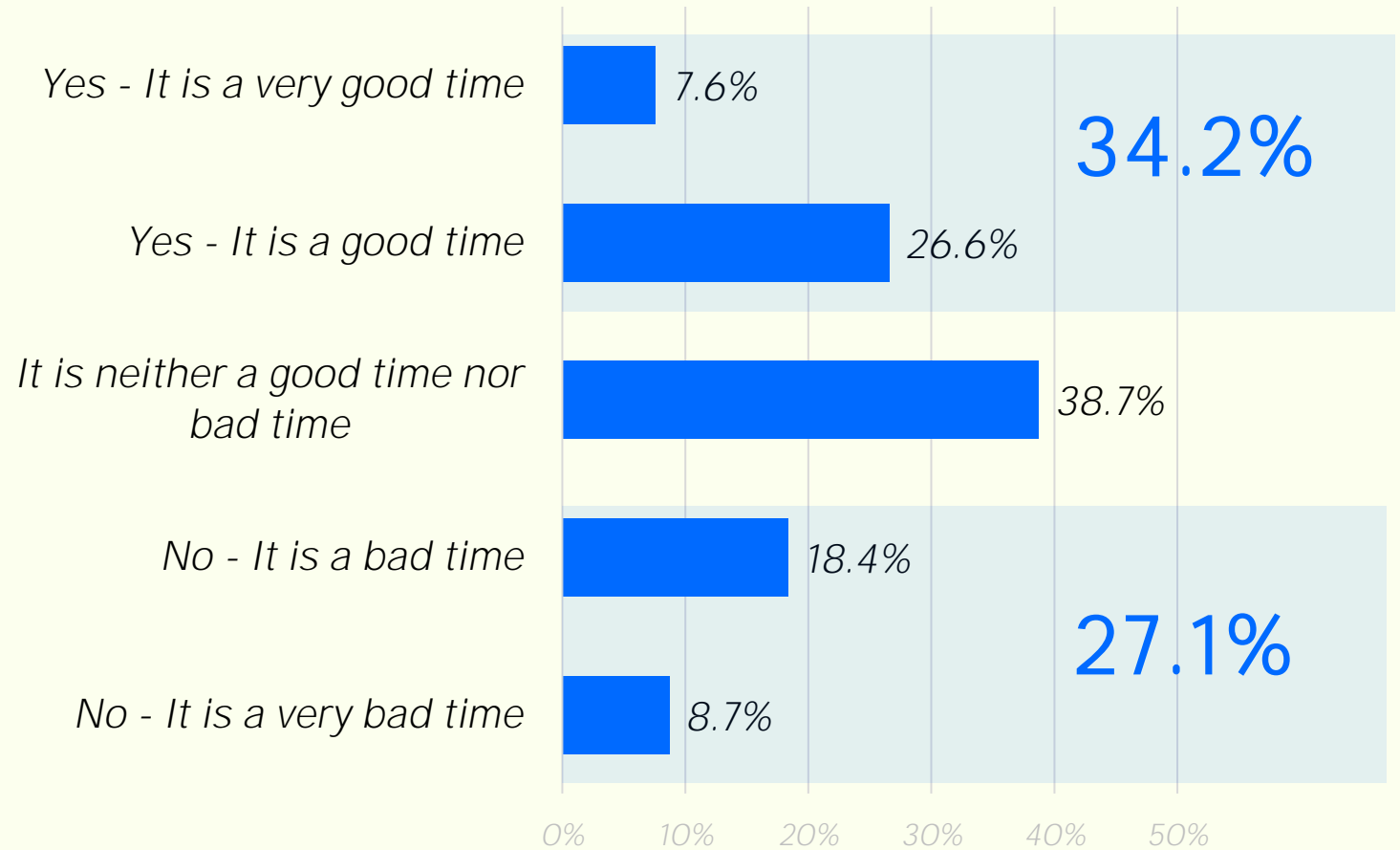
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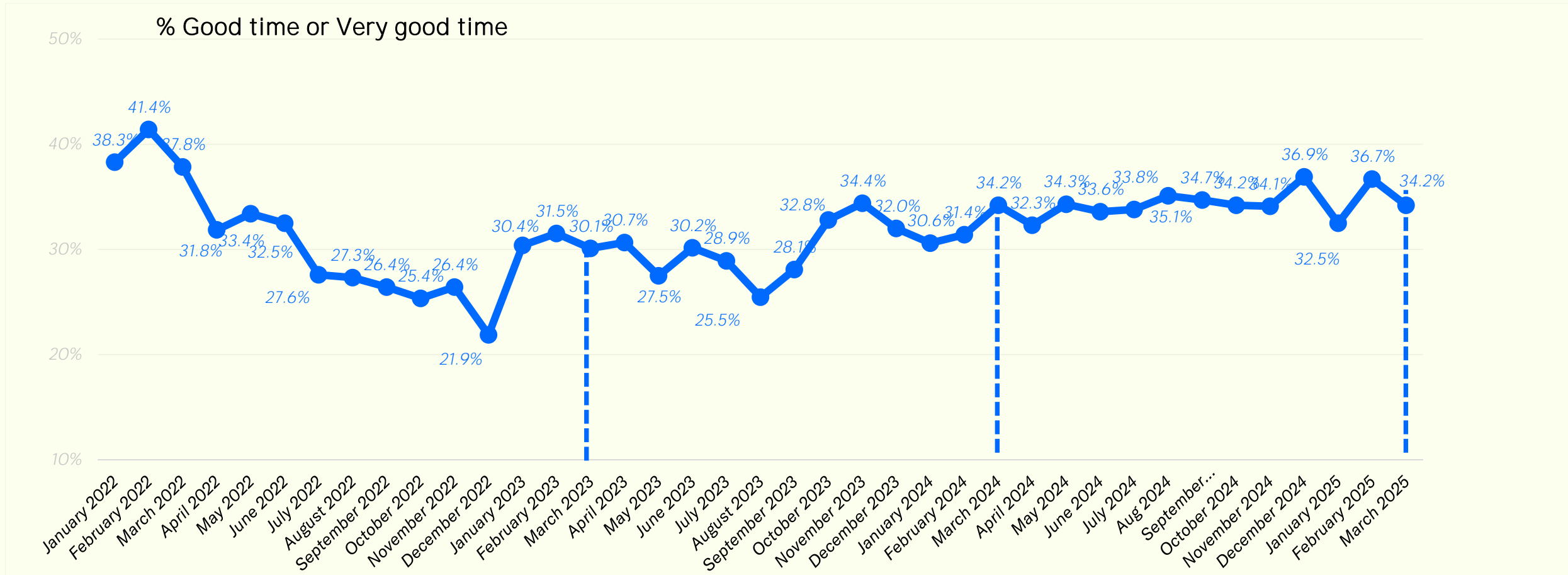
# Confidence that now is a good time to spend on leisure travel declined.

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?*



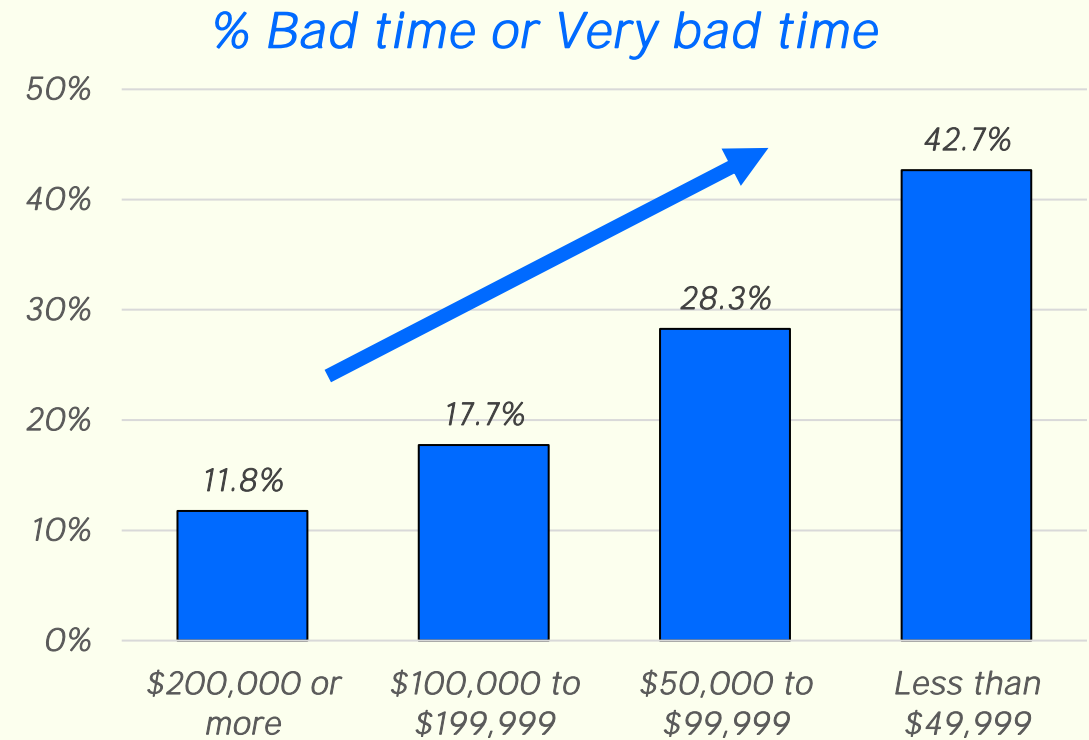
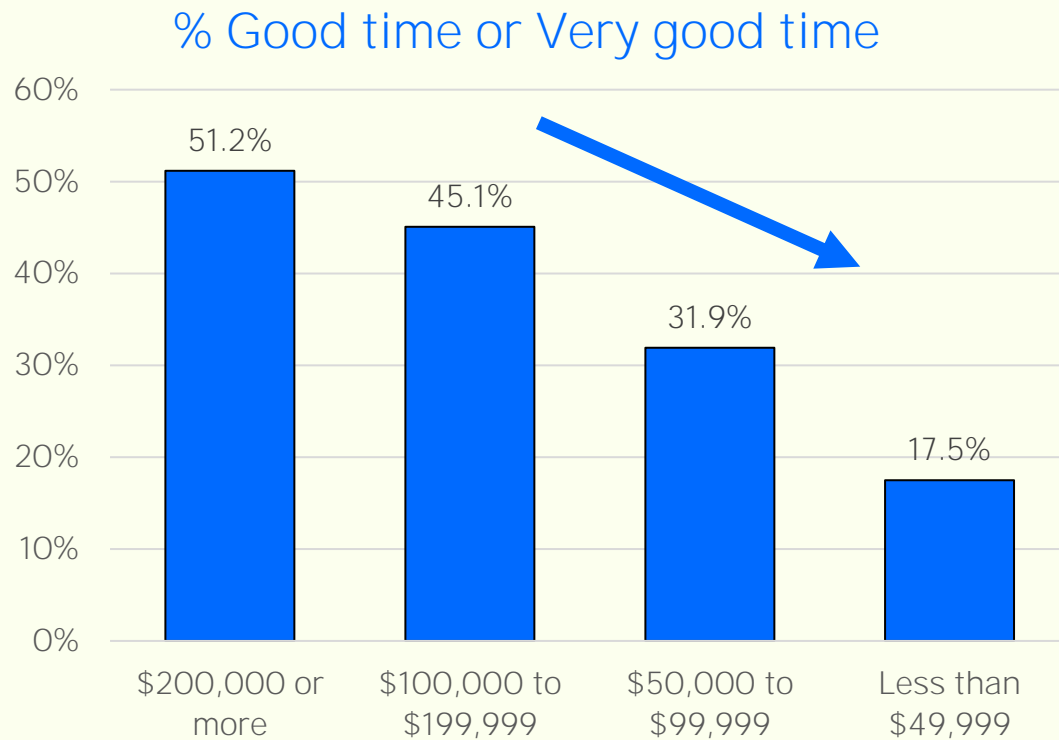
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# Affluent travelers versus others

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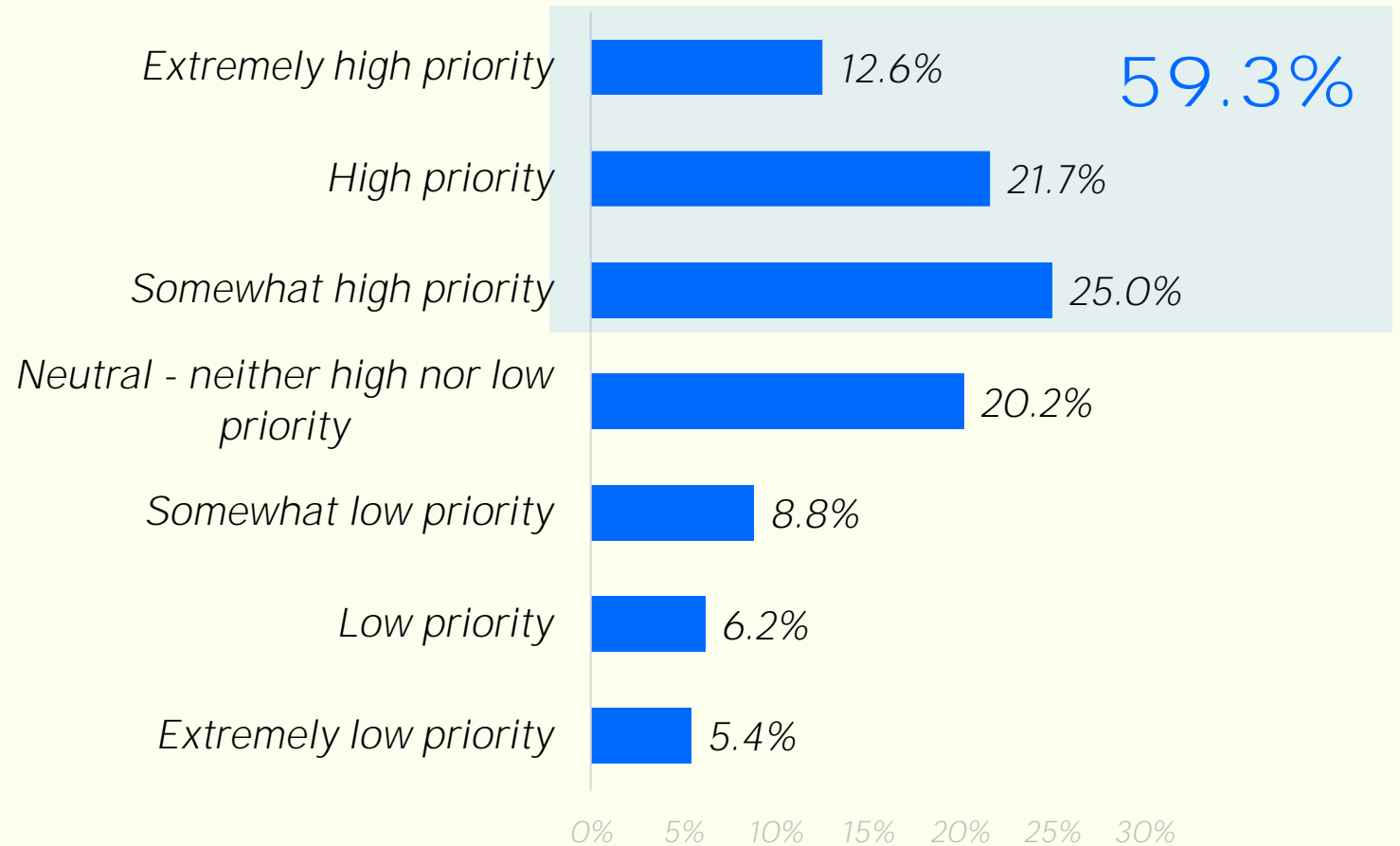


# Americans' intent to make travel a budget priority in the near-term future was stagnant.

## 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.

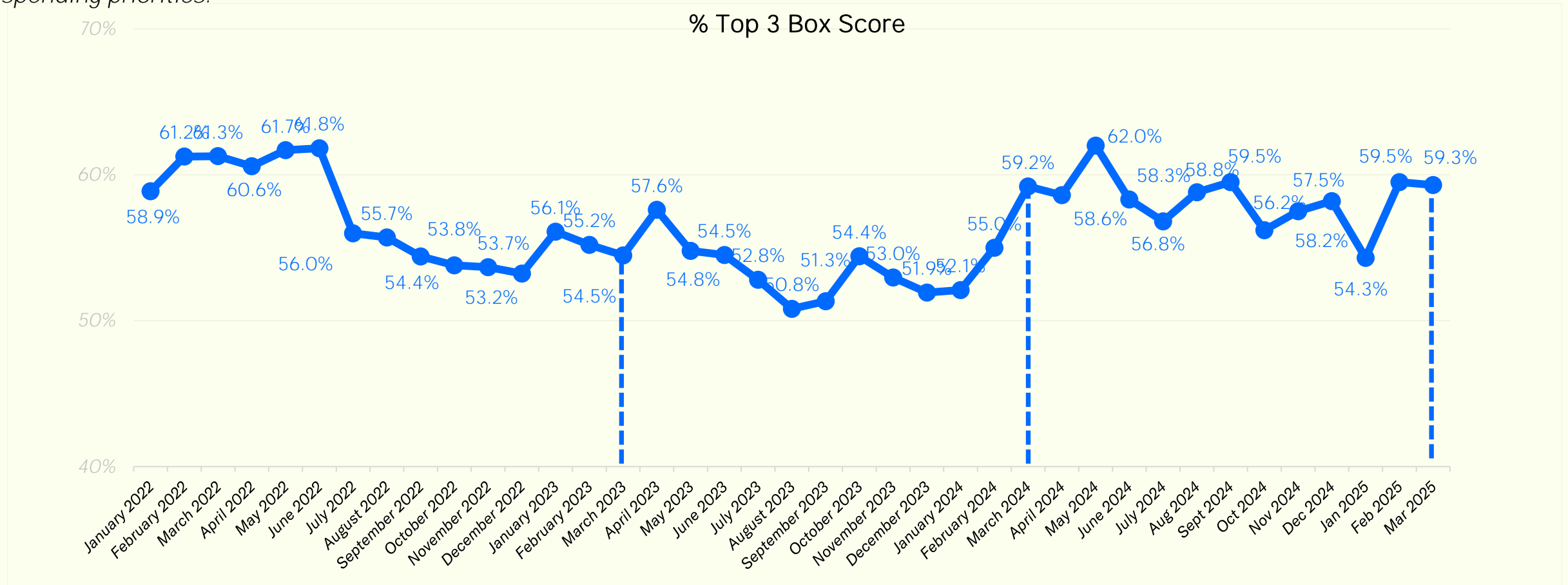
Leisure travel will be a(n) \_\_\_\_\_.



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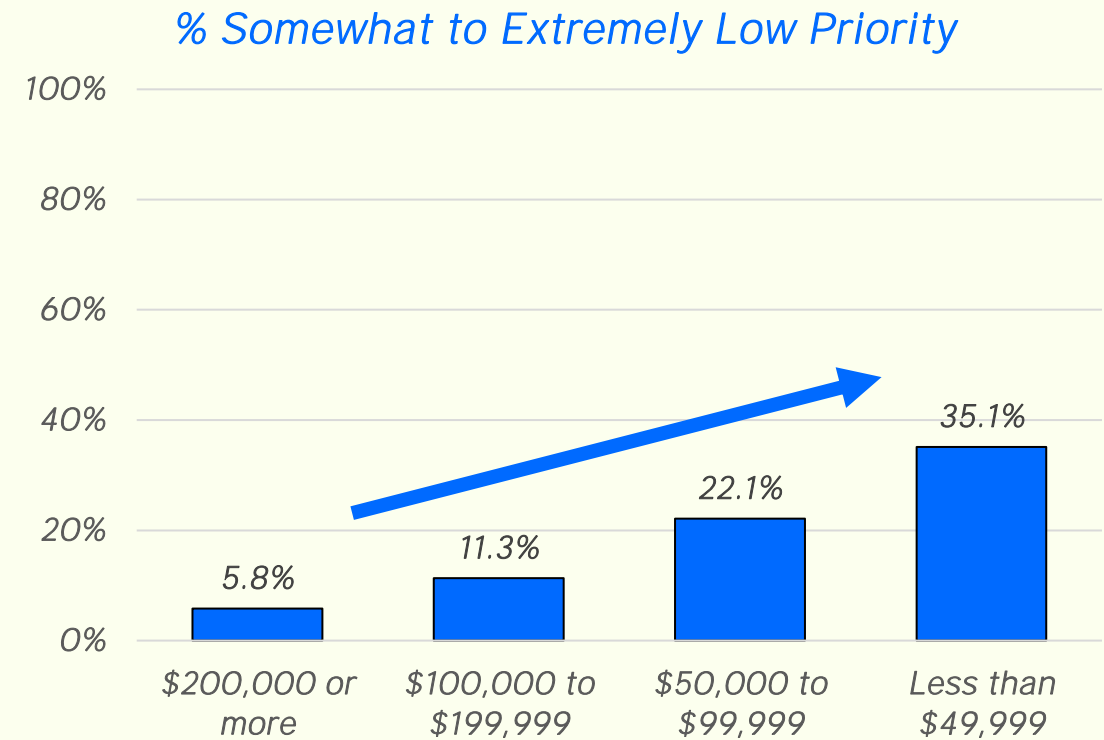
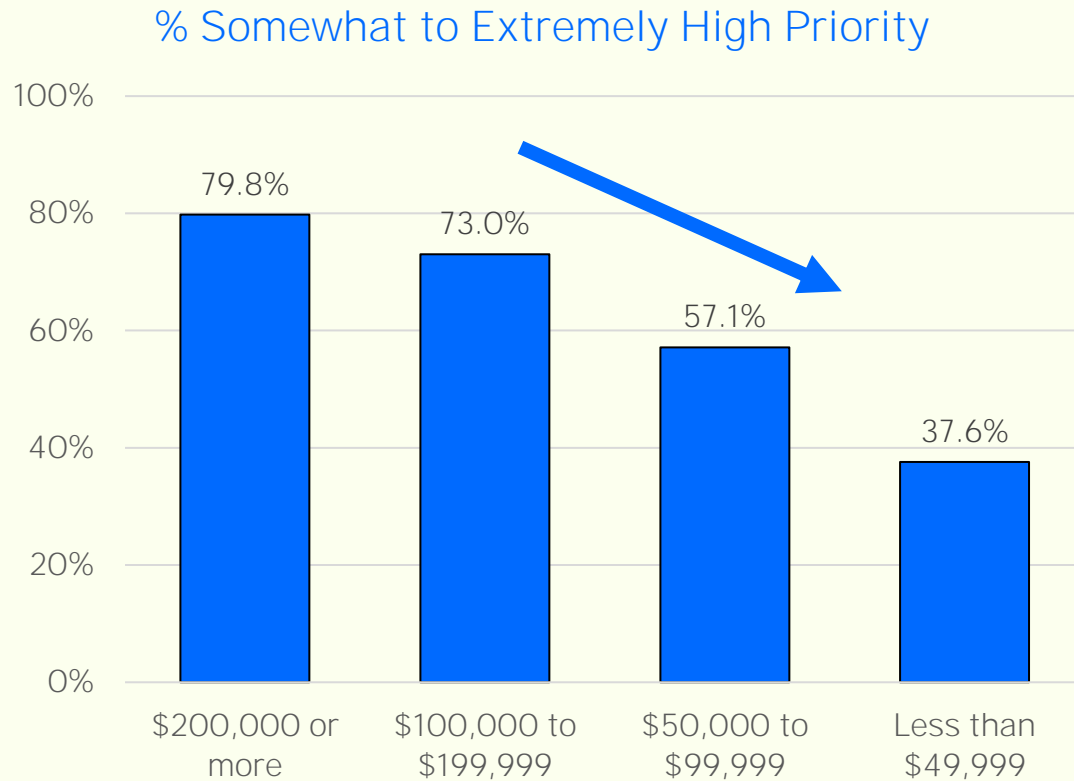
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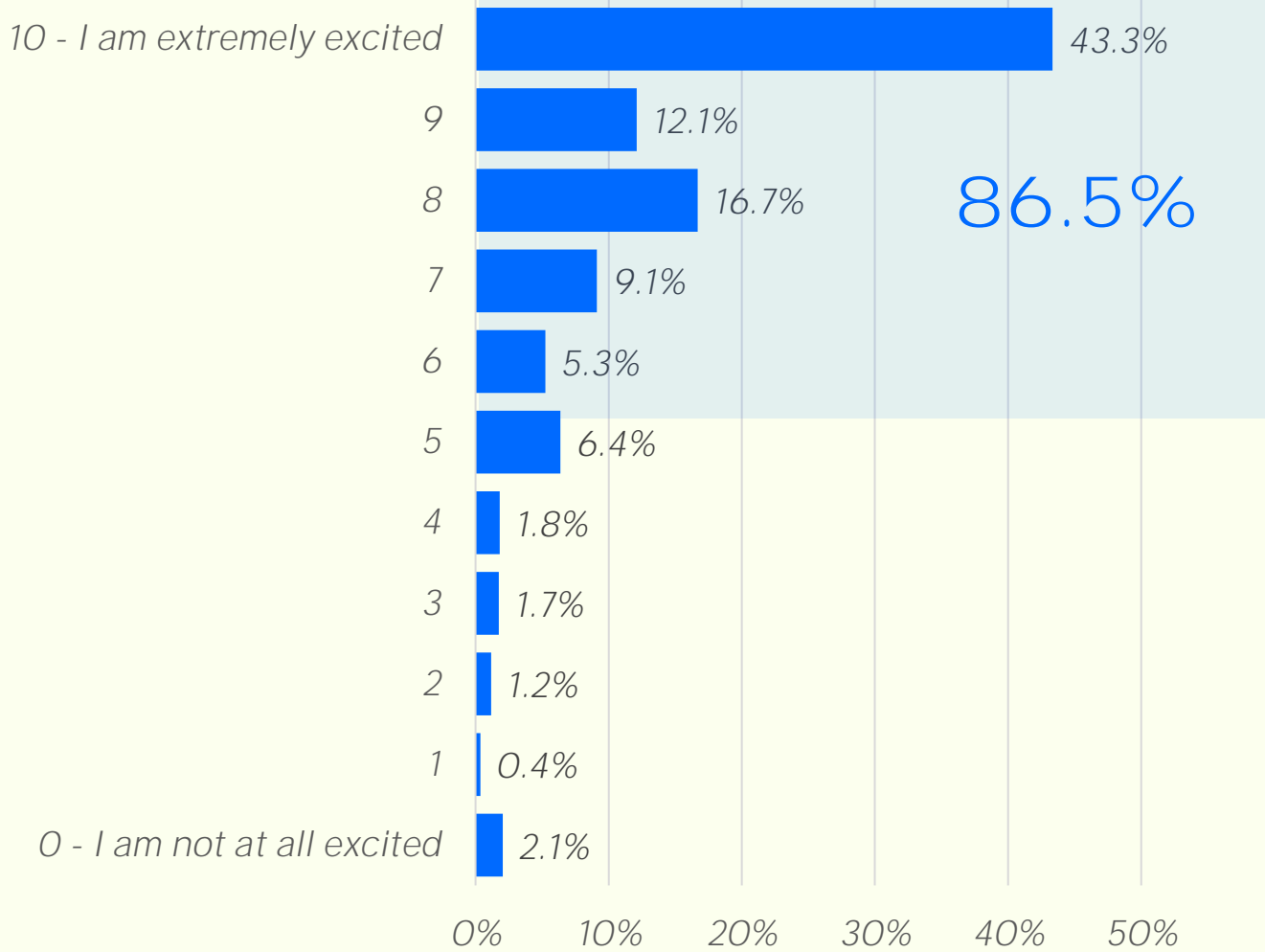




# Still Excited: Nearly 87% of American travelers register high excitement levels for travel

Question:

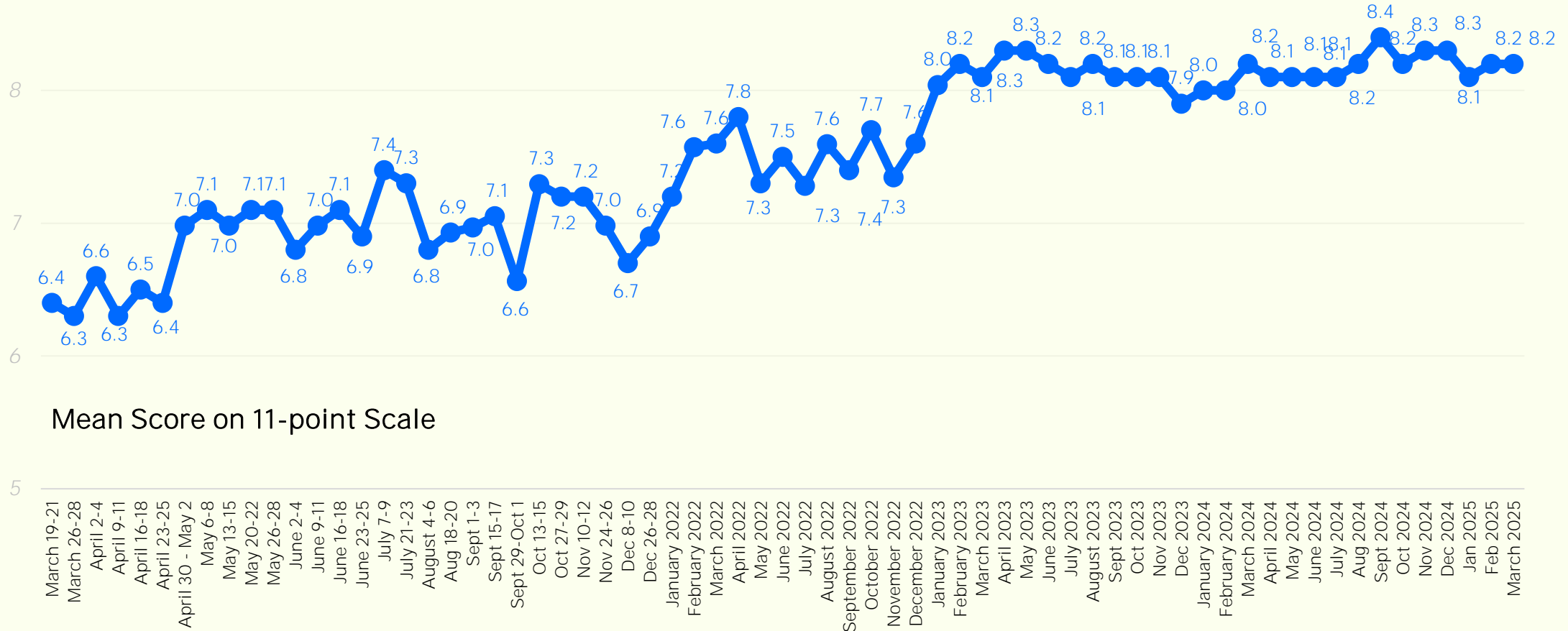
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



# Still Excited: Nearly 87% 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?*

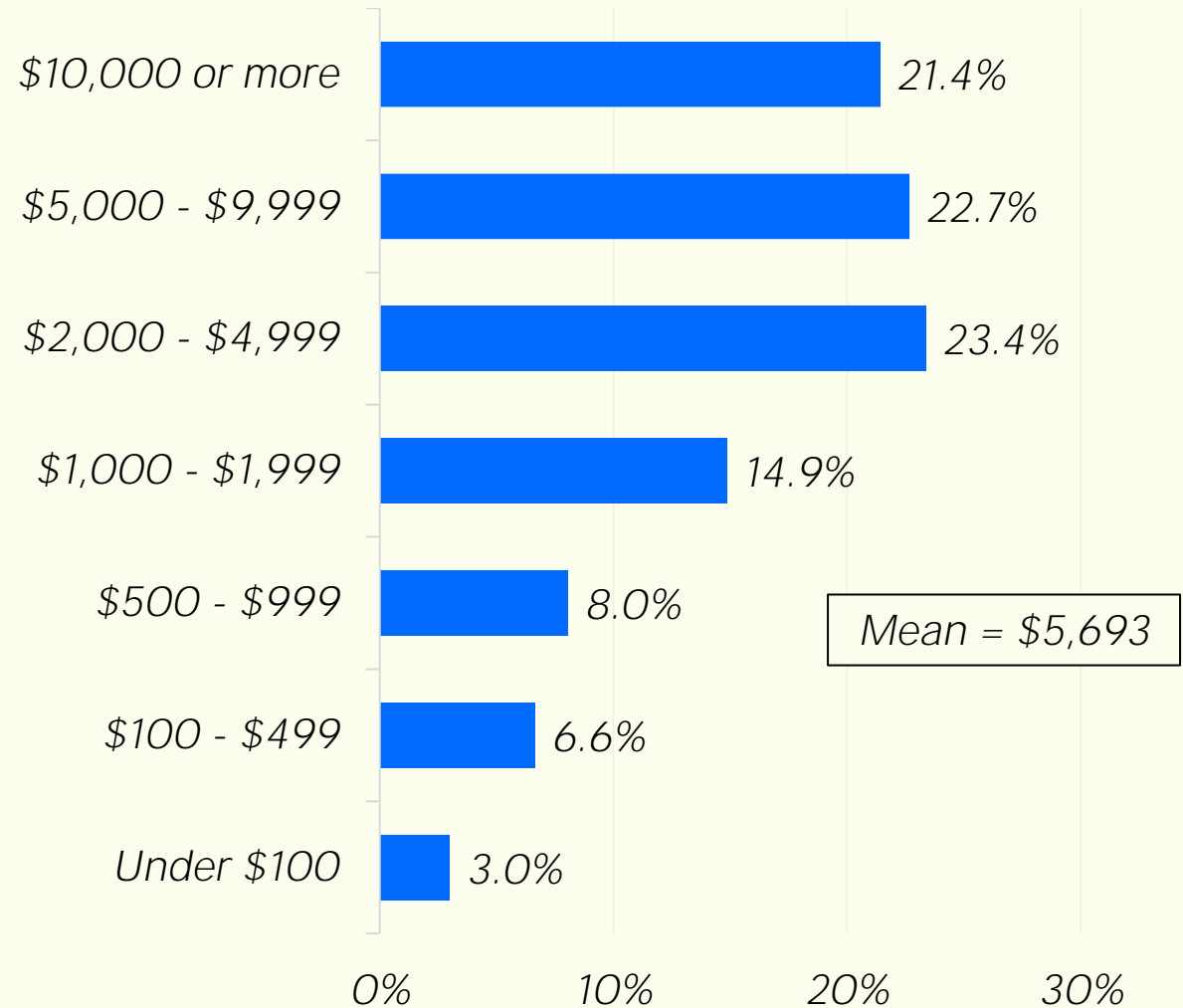


Mean Score on 11-point Scale

# Expected travel budgets are still strong, but dipped slightly this month.

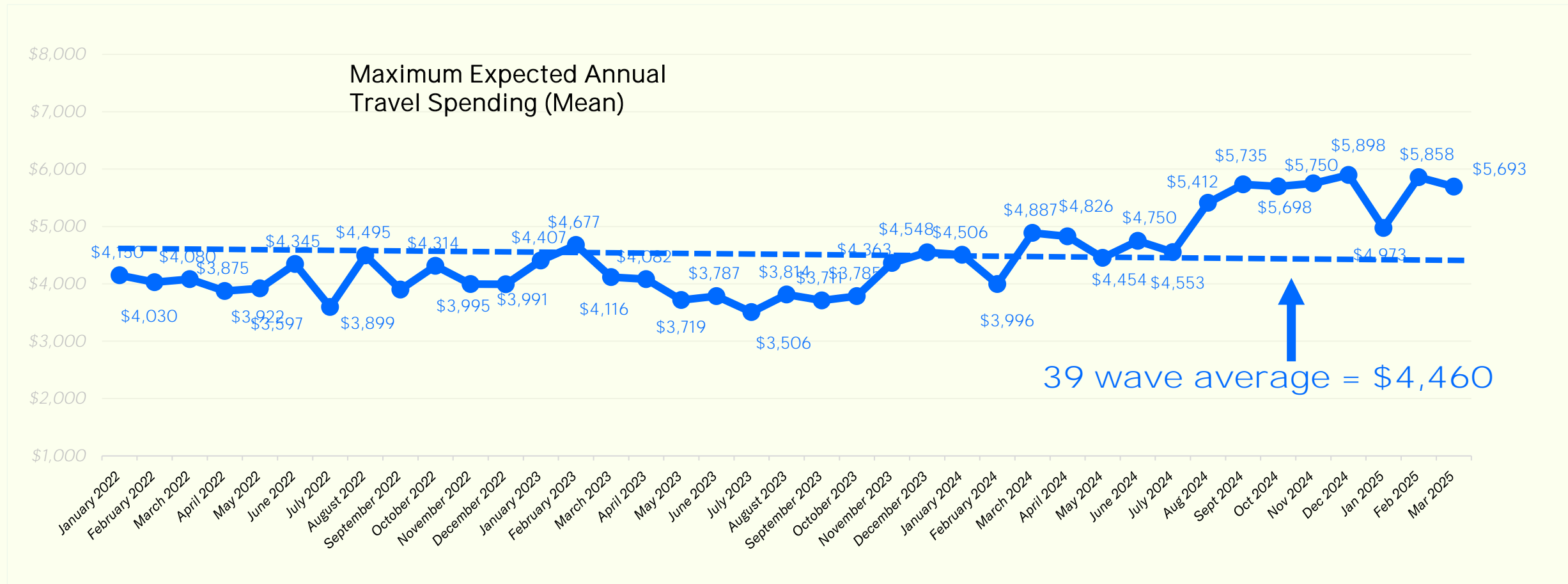
## Question:

*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 are still strong, but dipped slightly 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):*

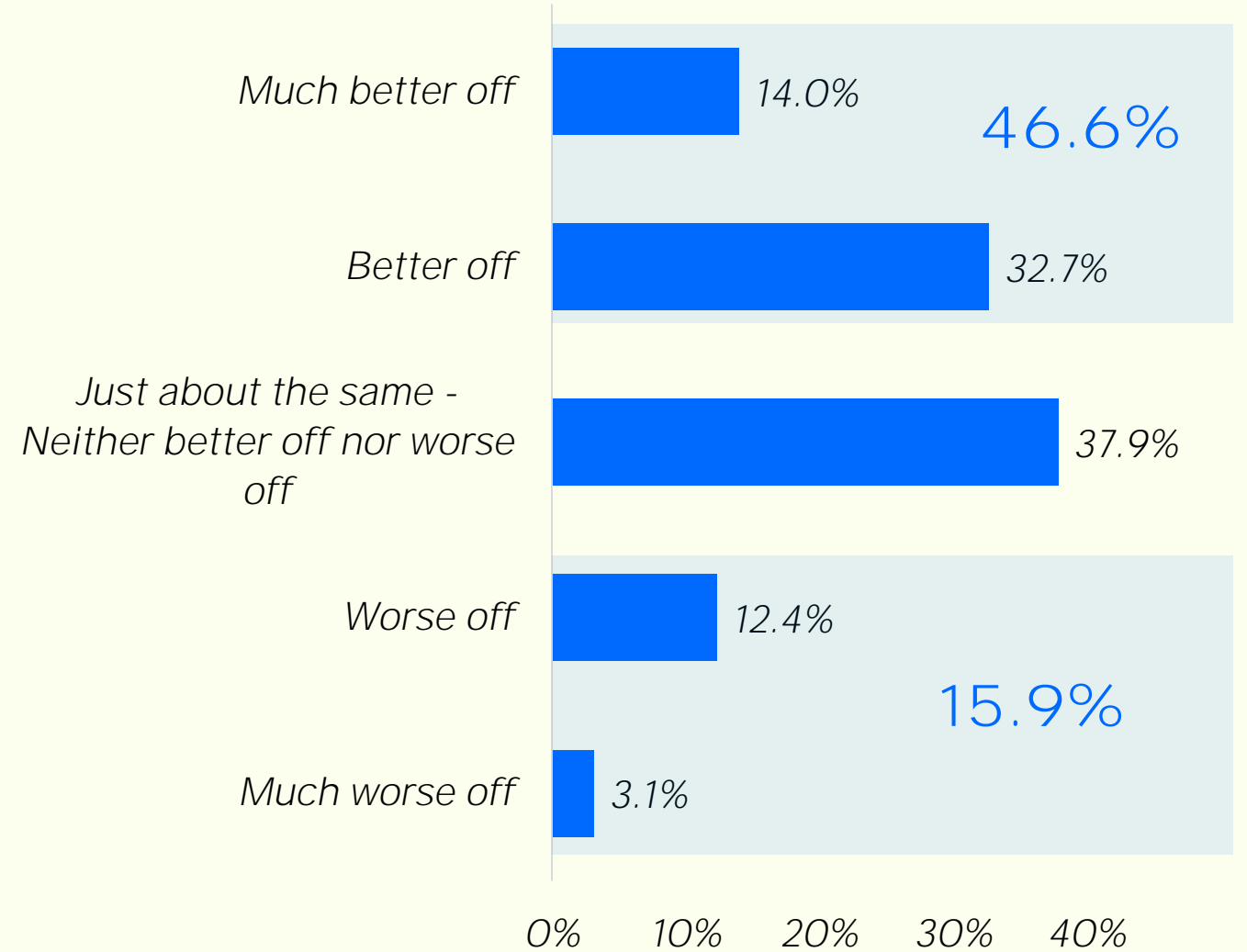




# Travelers feelings about their financial future changed very little this month.

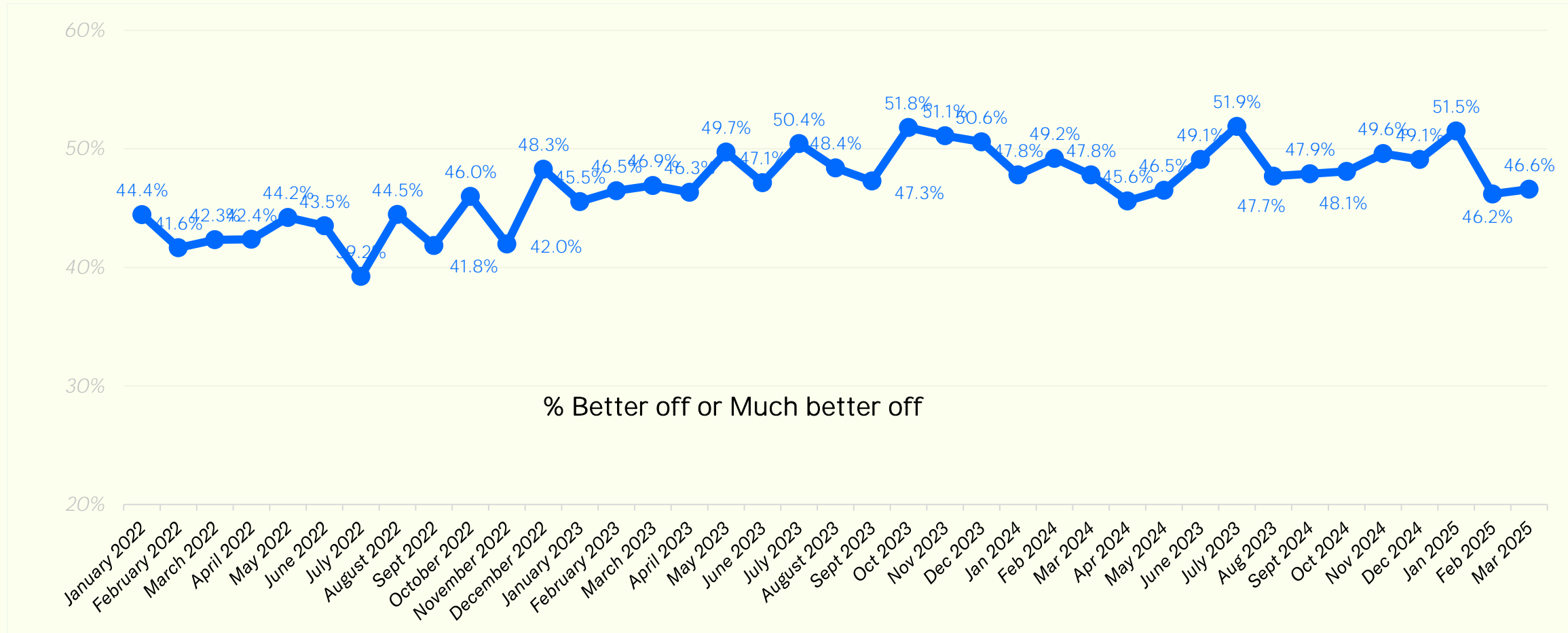
Question:

*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?*



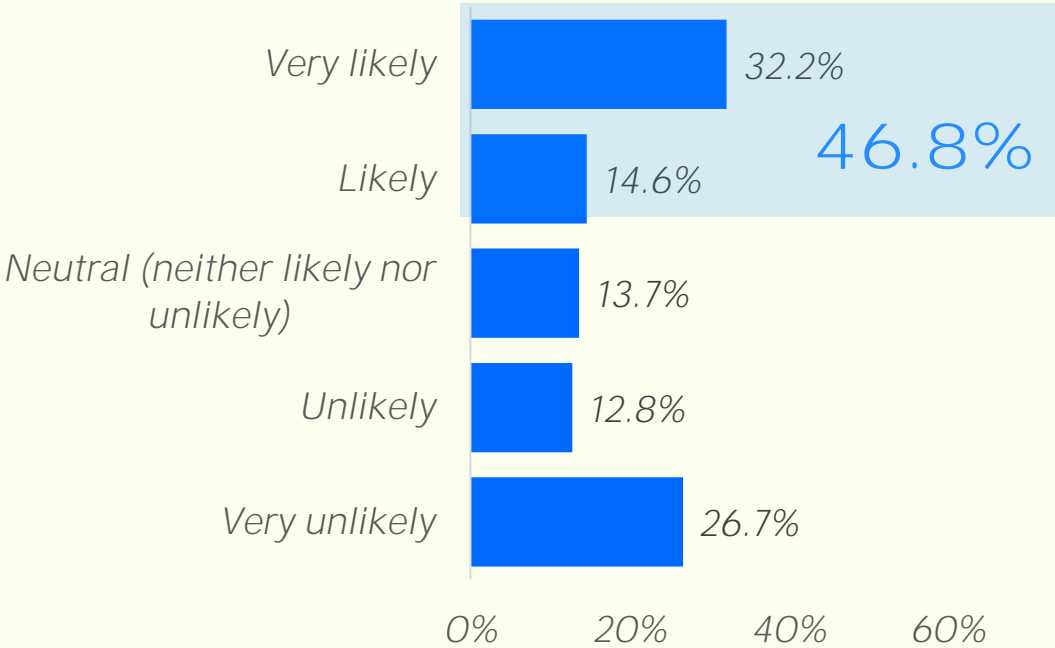
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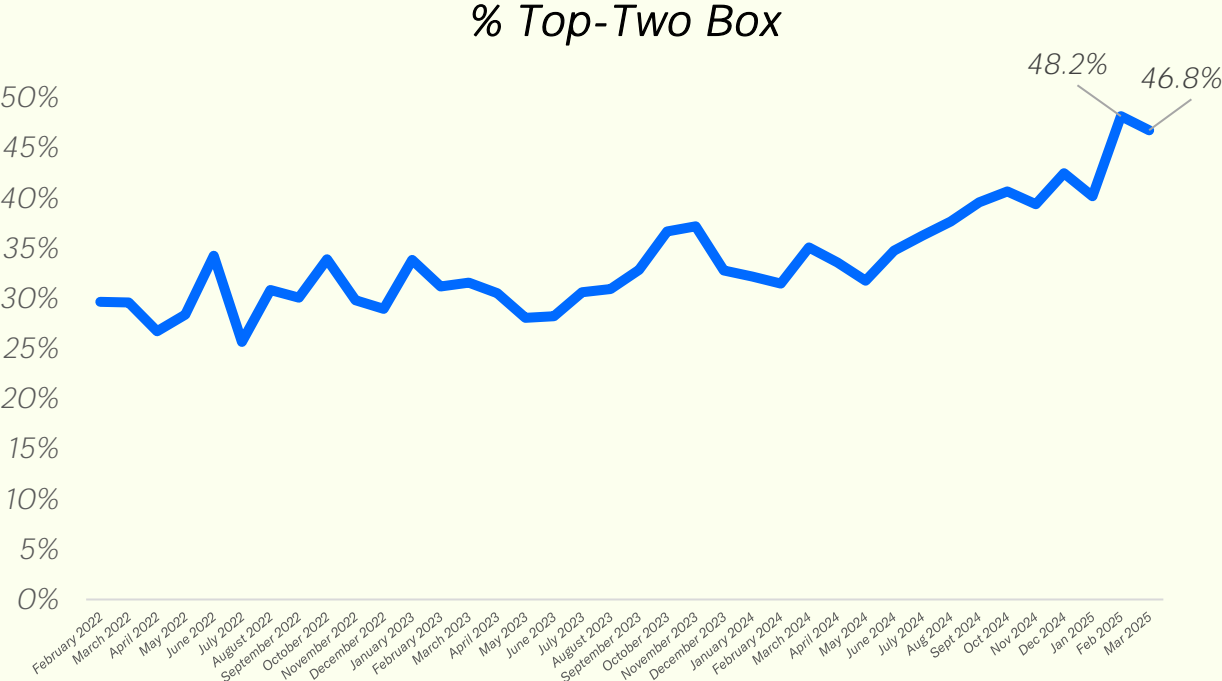


# Anticipated international travel is still quite high.

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

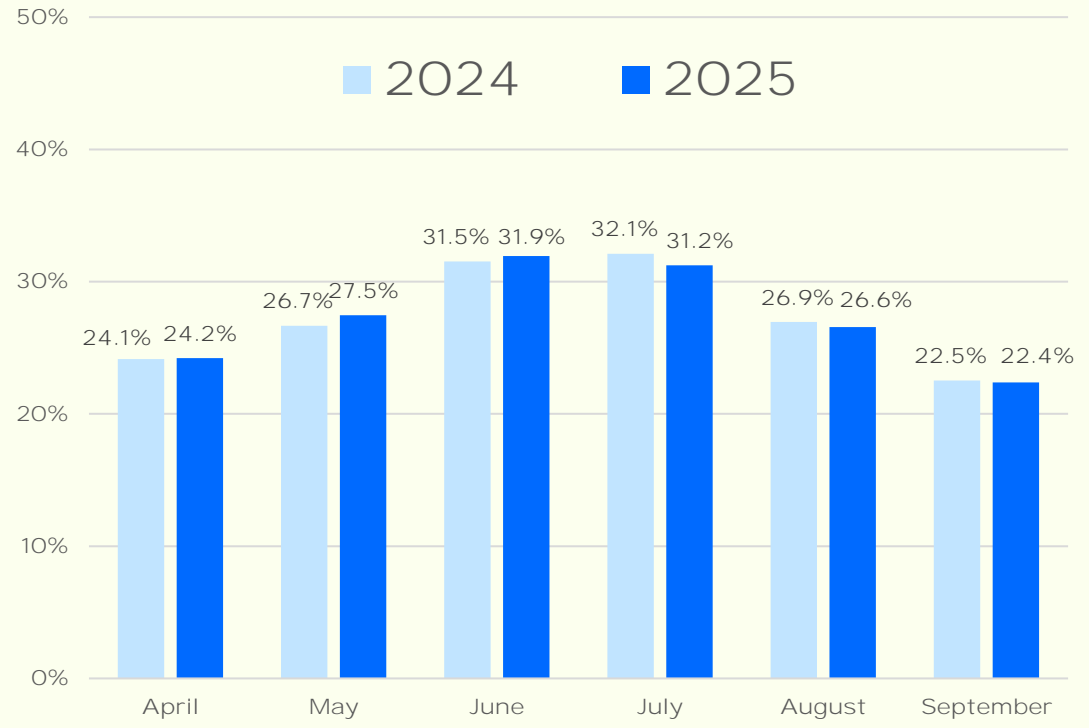
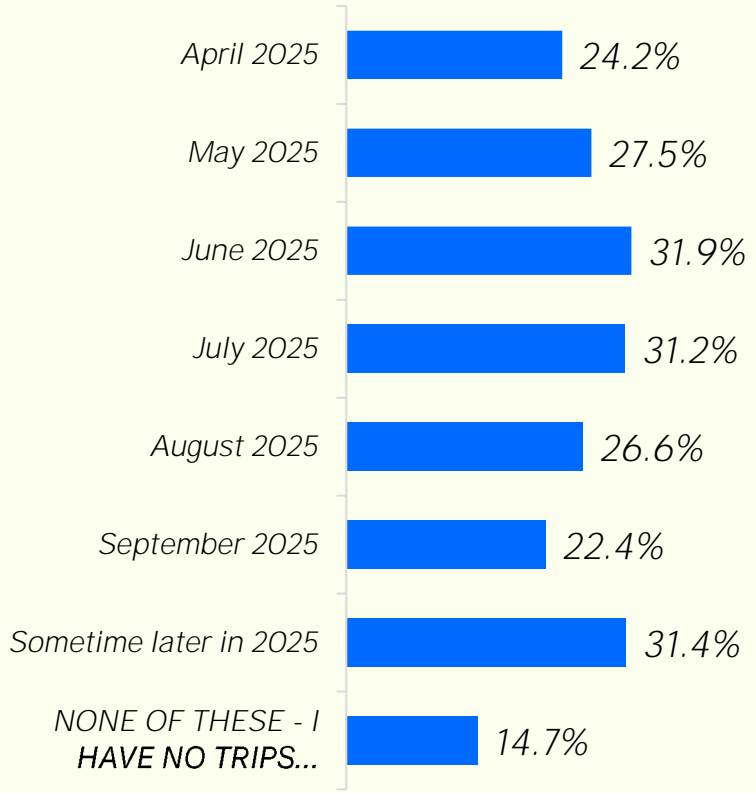


**Historical data**



# Expected near-term travel appears to be holding the line with last year's performance.

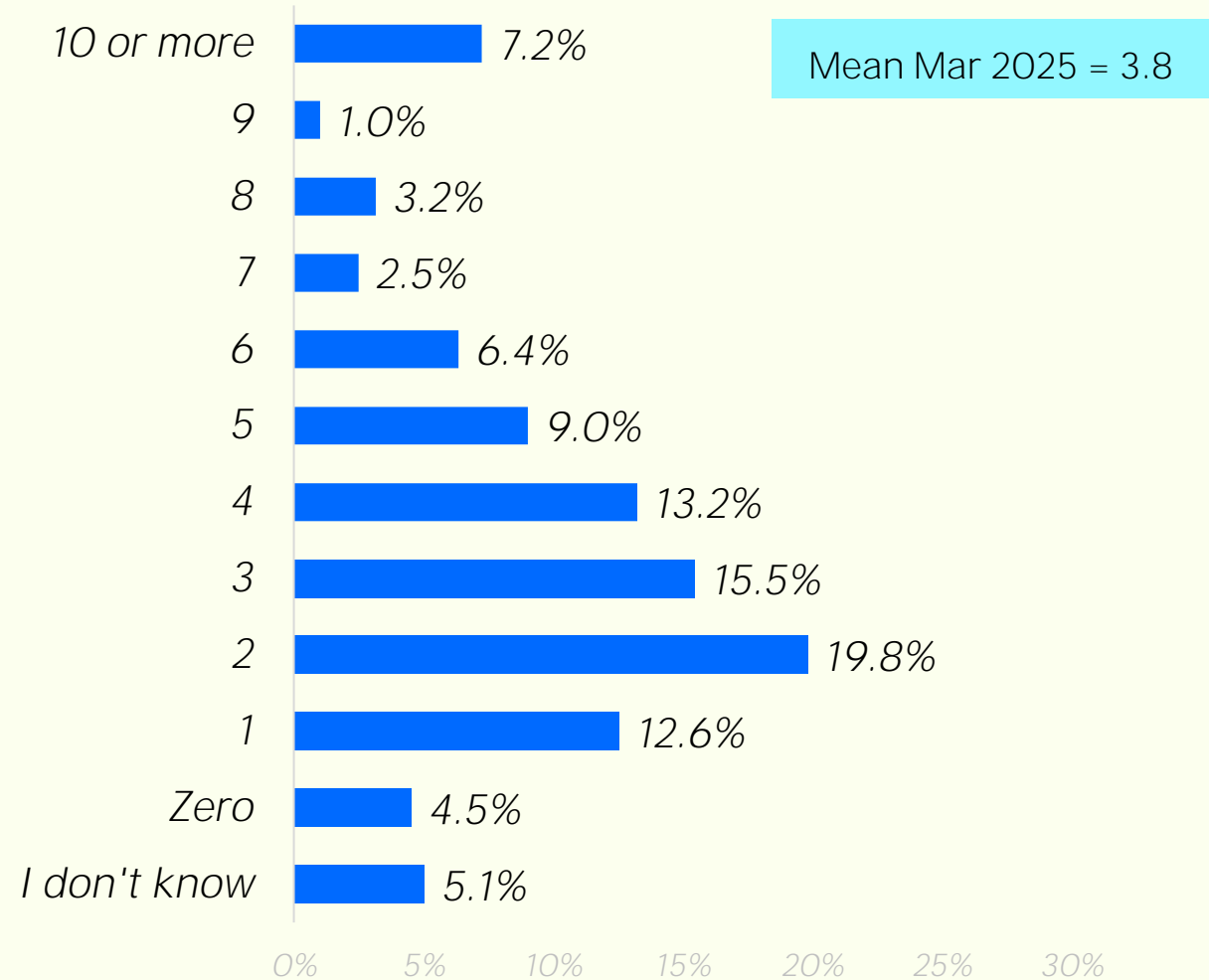
Question: *In which months do you currently have any leisure trips planned (even if only tentatively)?*



# Travelers have cut back on the number of trips they are planning.

Question:

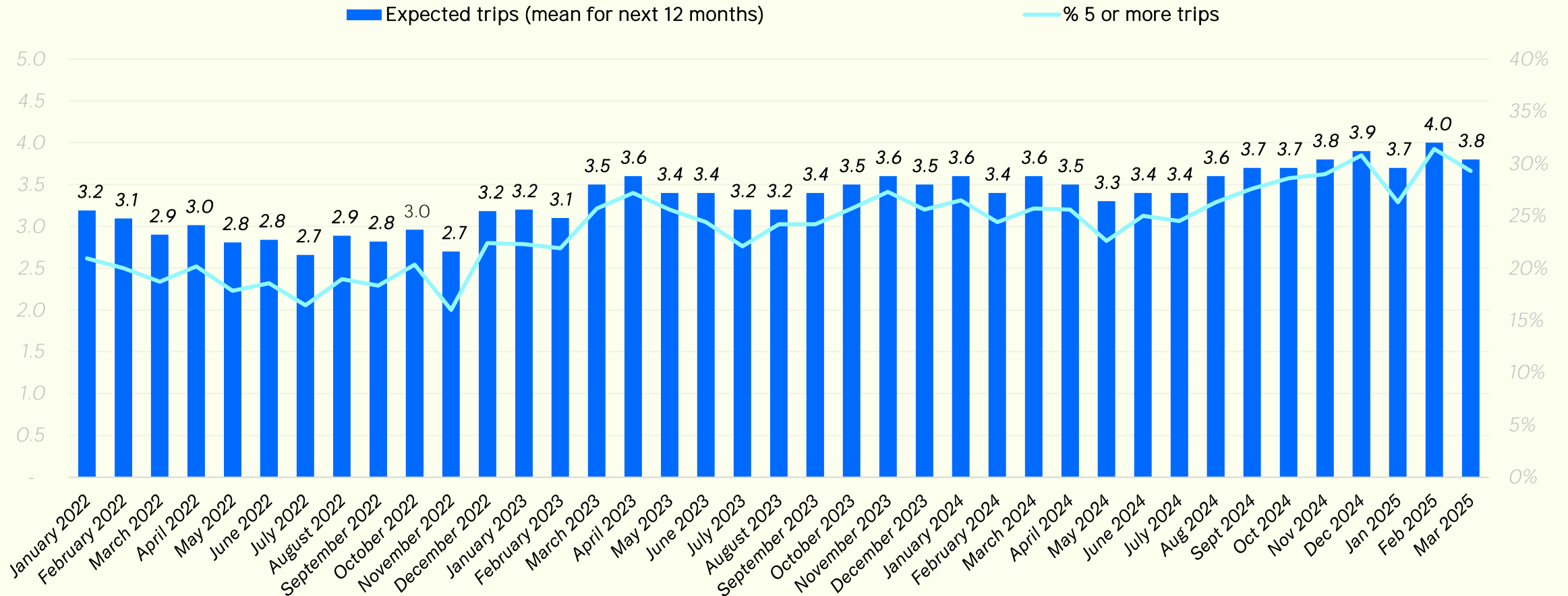
*IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?*



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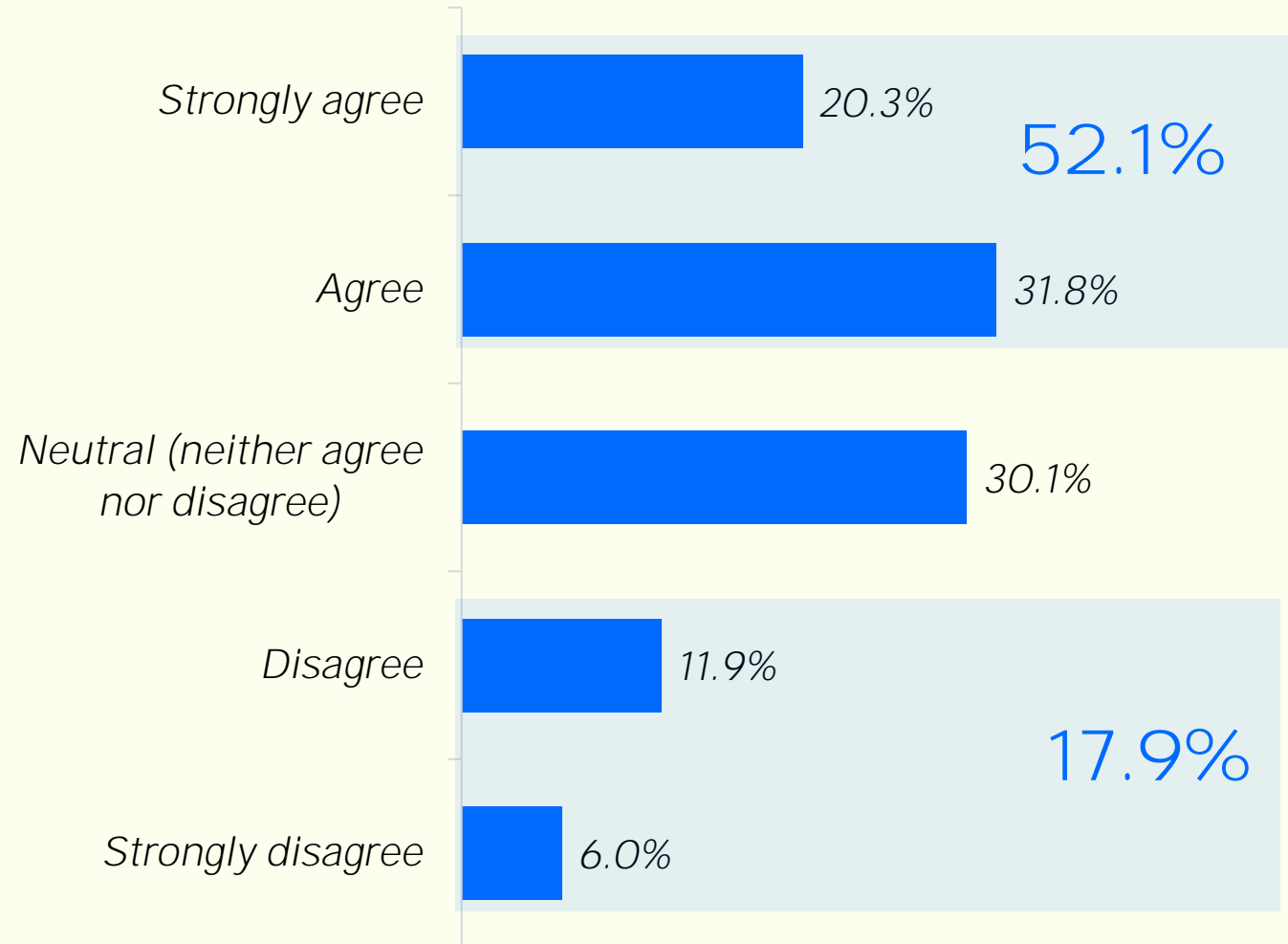




# More than half of travelers now expect an recession in the next six months.

Question:

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

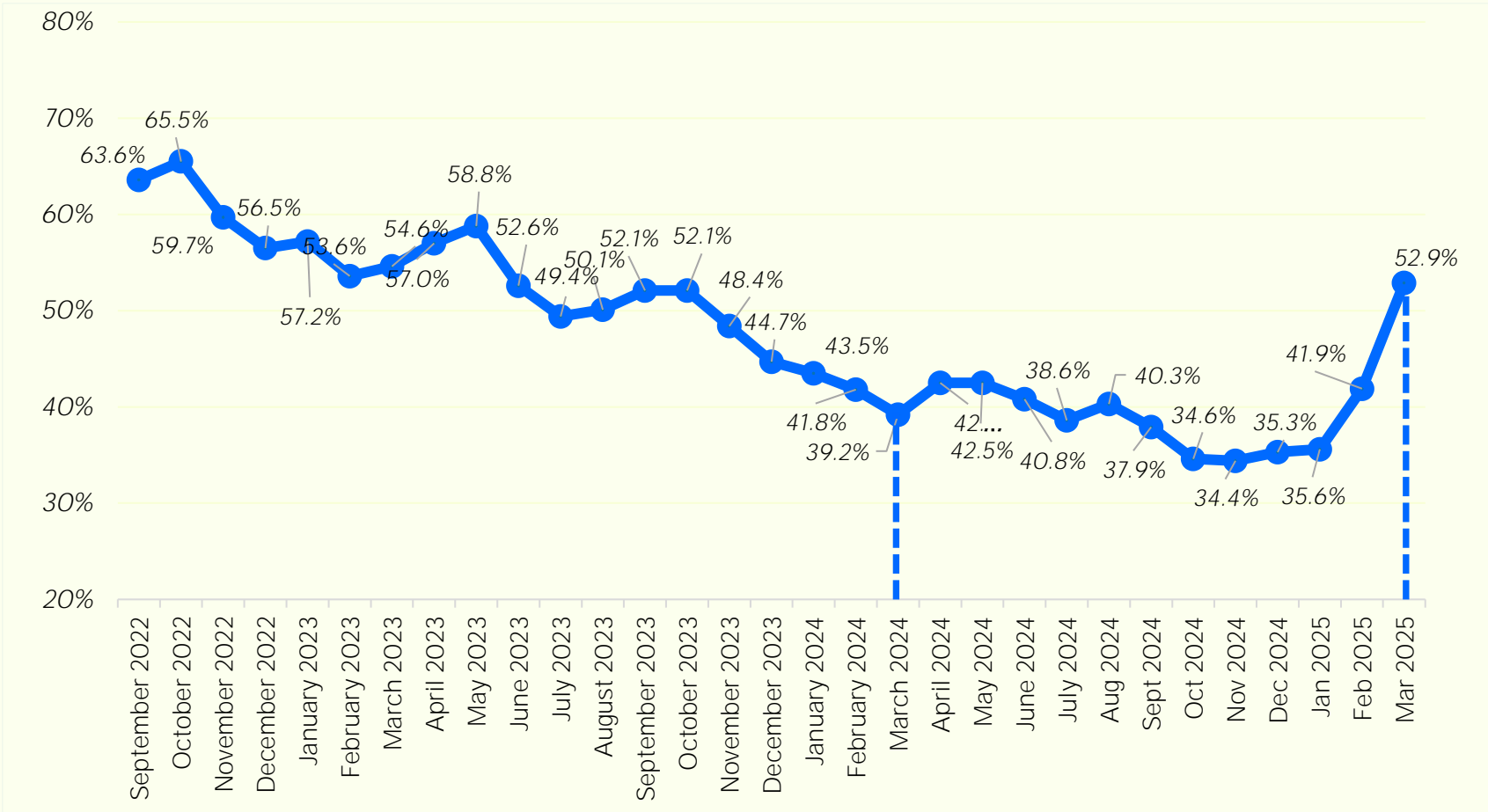


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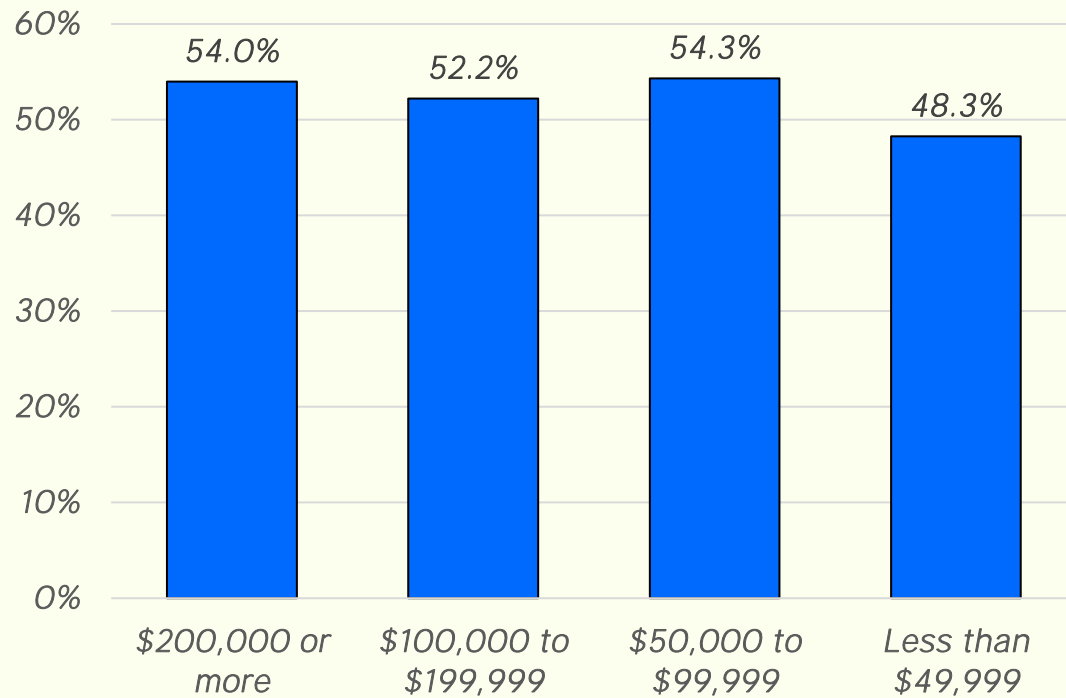
**% Agree or Strongly agree**



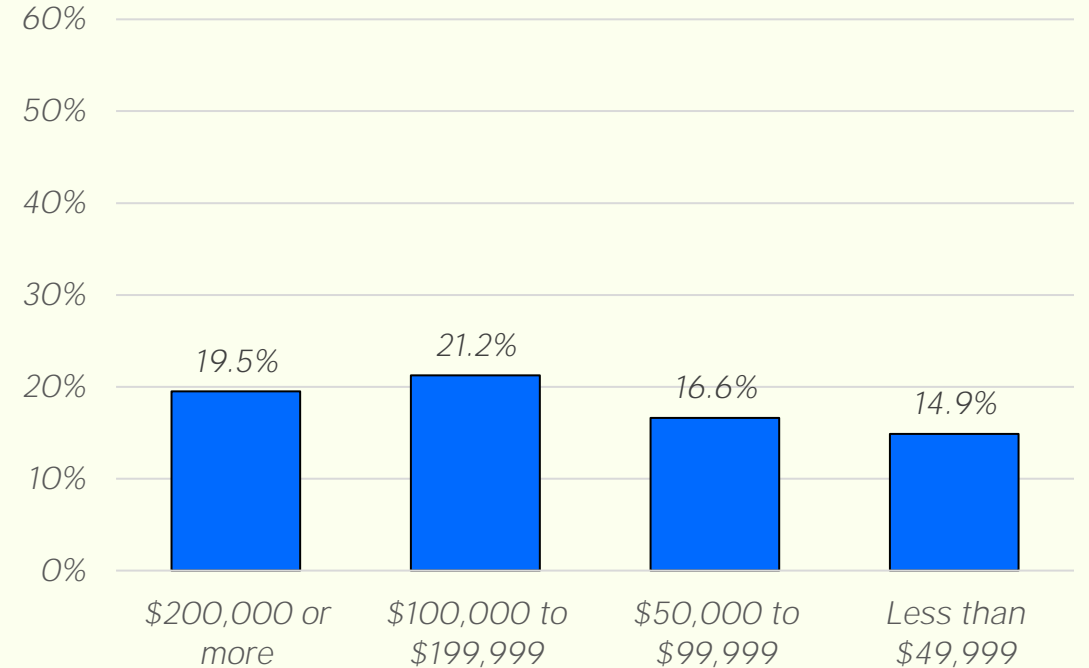
# Affluent Travelers vs. Others

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

*% Agree or Strongly agree*



*% Disagree or Strongly disagree*



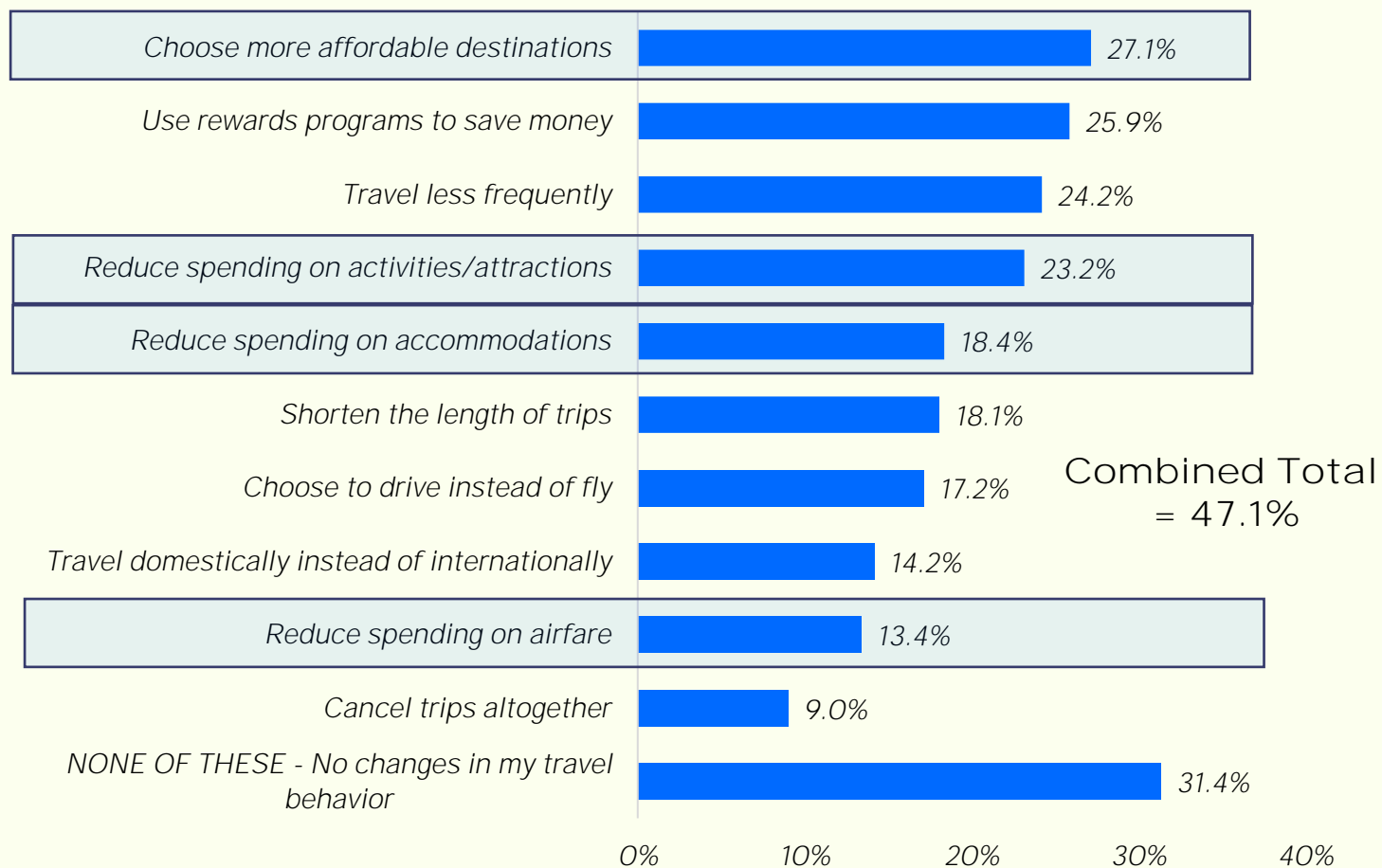
# Nearly 70% of travelers expects to be using one of these (in the next 6 months) to deal with economic concerns.

Question:

*Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.*

*Due specifically to concerns about the economy, I expect to*

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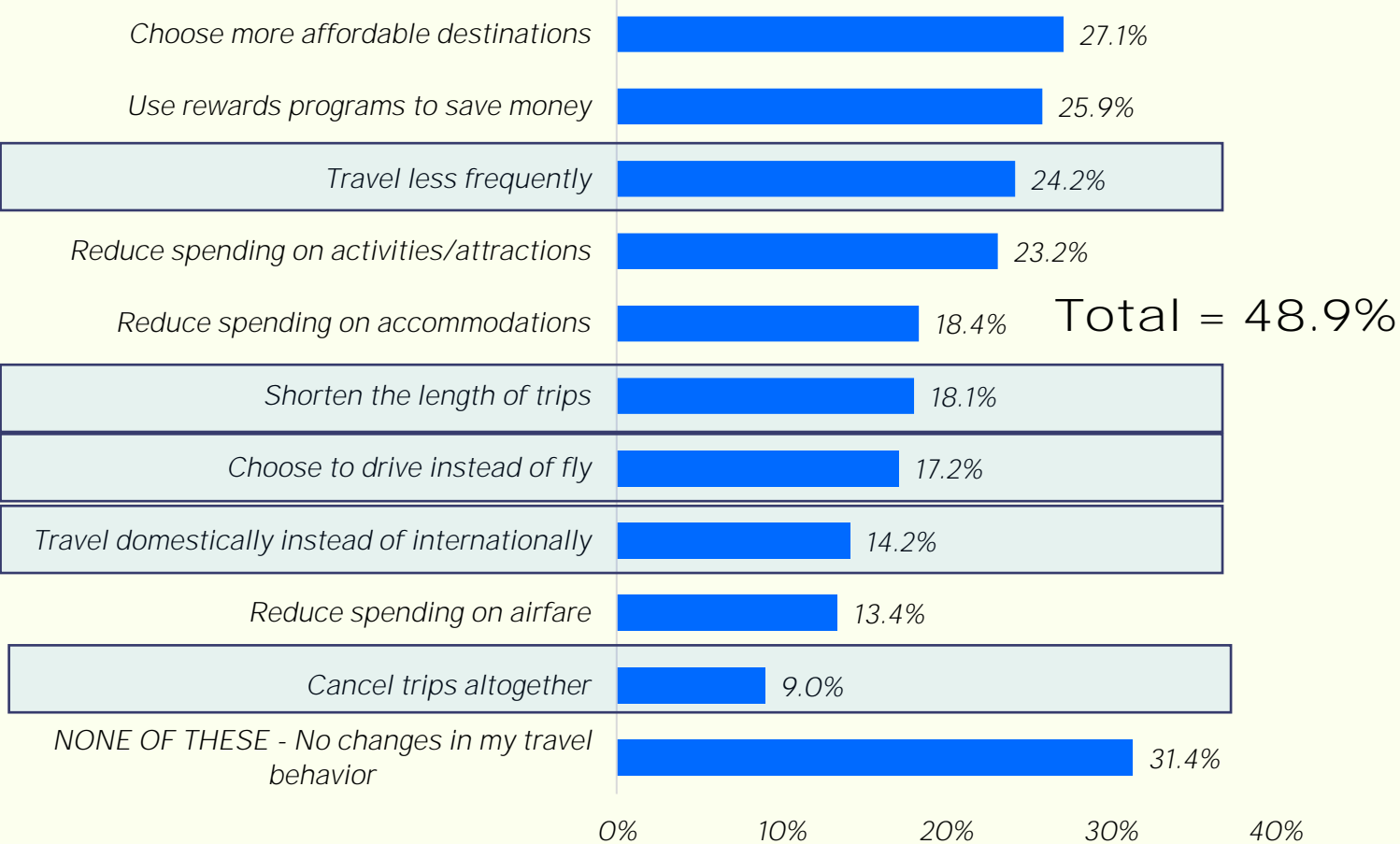


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# The Story of the Data:

- Despite extraordinary recent uncertainty, traveler sentiment remains similar to last year at this time.
- Travelers are bracing for economic trouble, as recession fears are rising fast.
- A significant proportion of travelers say they are changing buying behaviors as a result of these concerns.





# Travel Red Flags and Green Flags

**WARNING!**



*a walking red flag*

**GREEN FLAG**

**they like rain**



f4iry.p1sces

Situation →

- Major Green Flag
- Green Flag
- Neutral
- Red Flag
- Major Red Flag

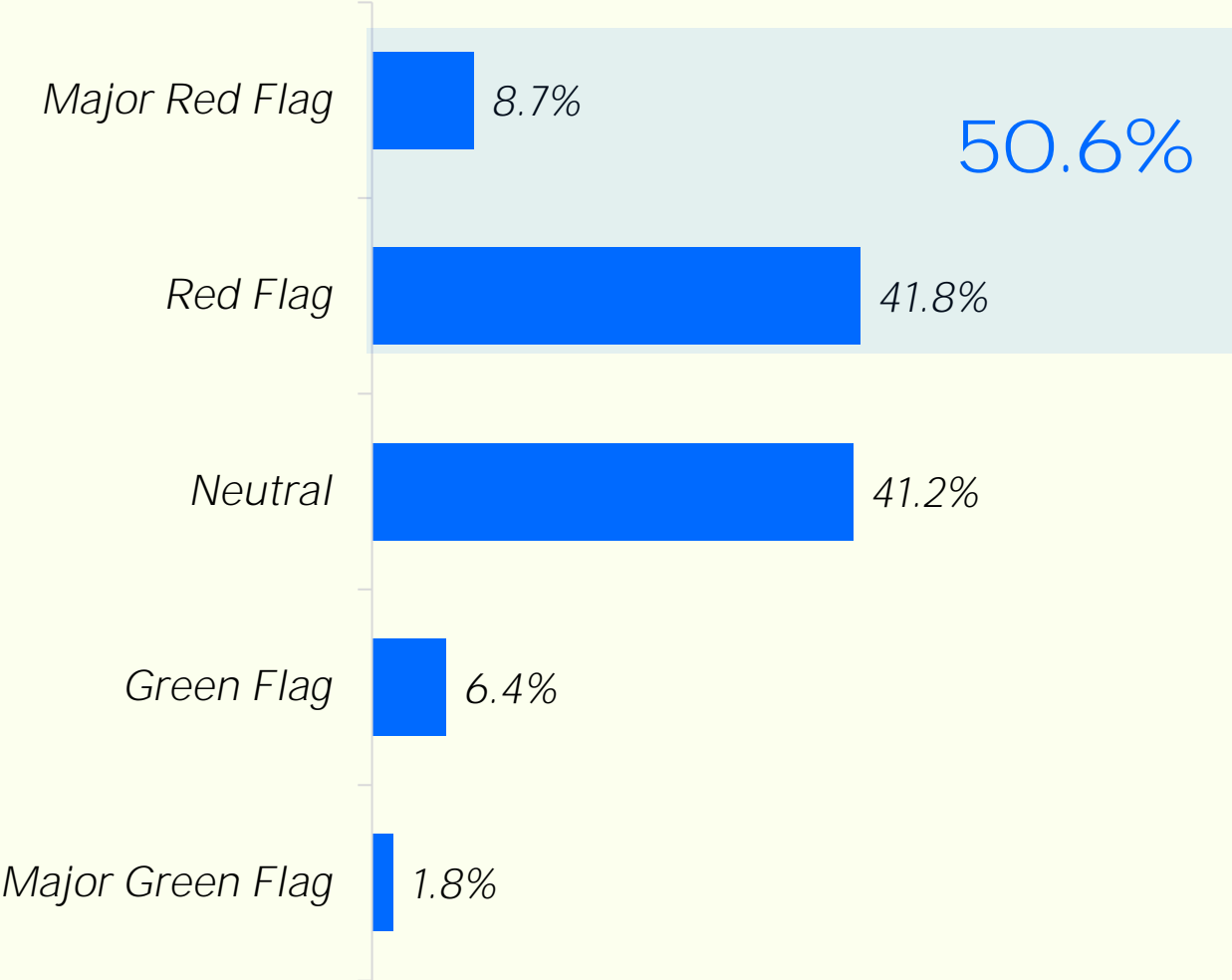
# PRICE SENSITIVITY



# Hotel Rates Get the Red Flags Flying

## Situation:

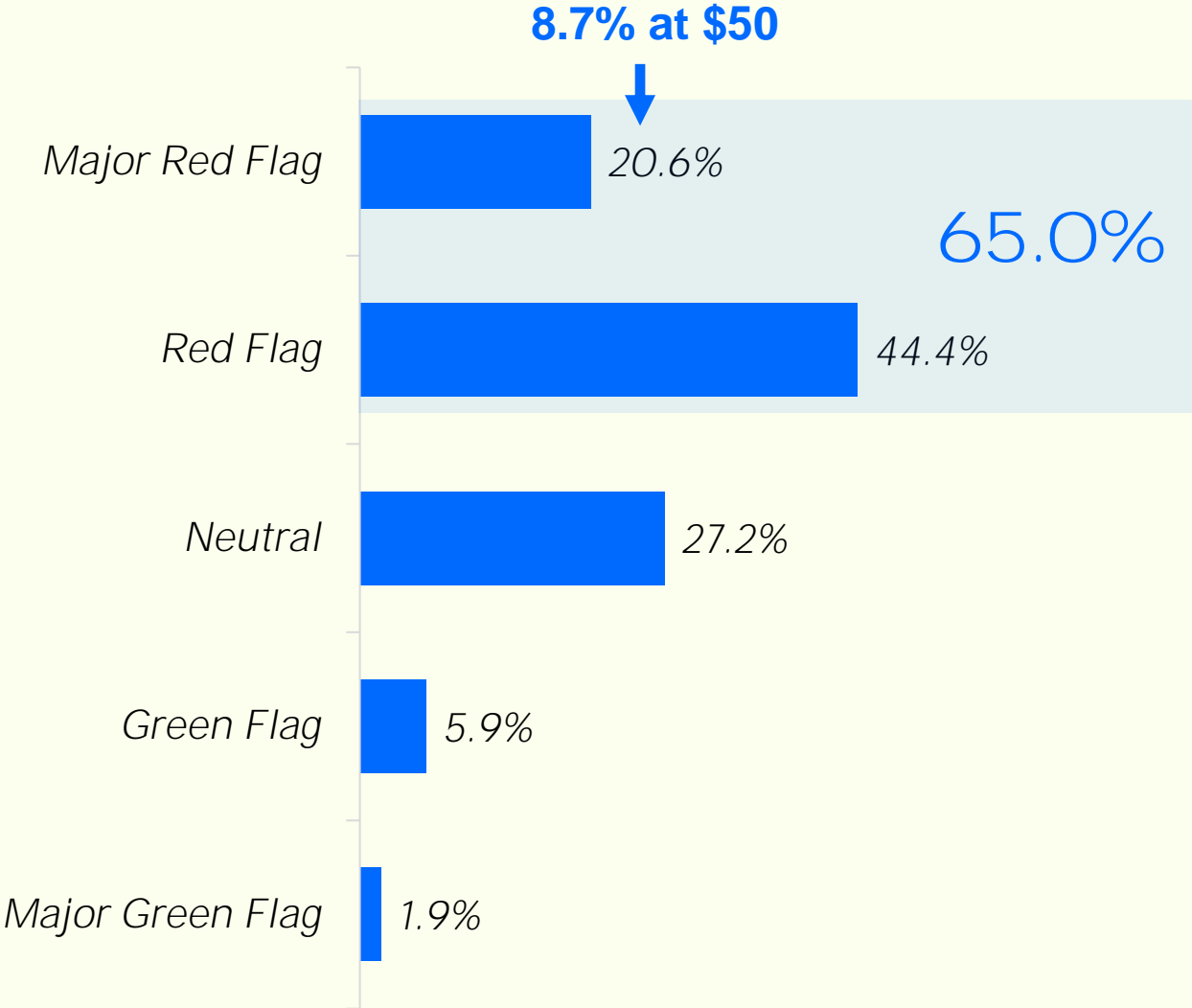
*Nightly hotel rates in this destination are about \$50 higher than you anticipated.*



# \$100 More Than Doubles the Major Red Flags Flying

## Situation:

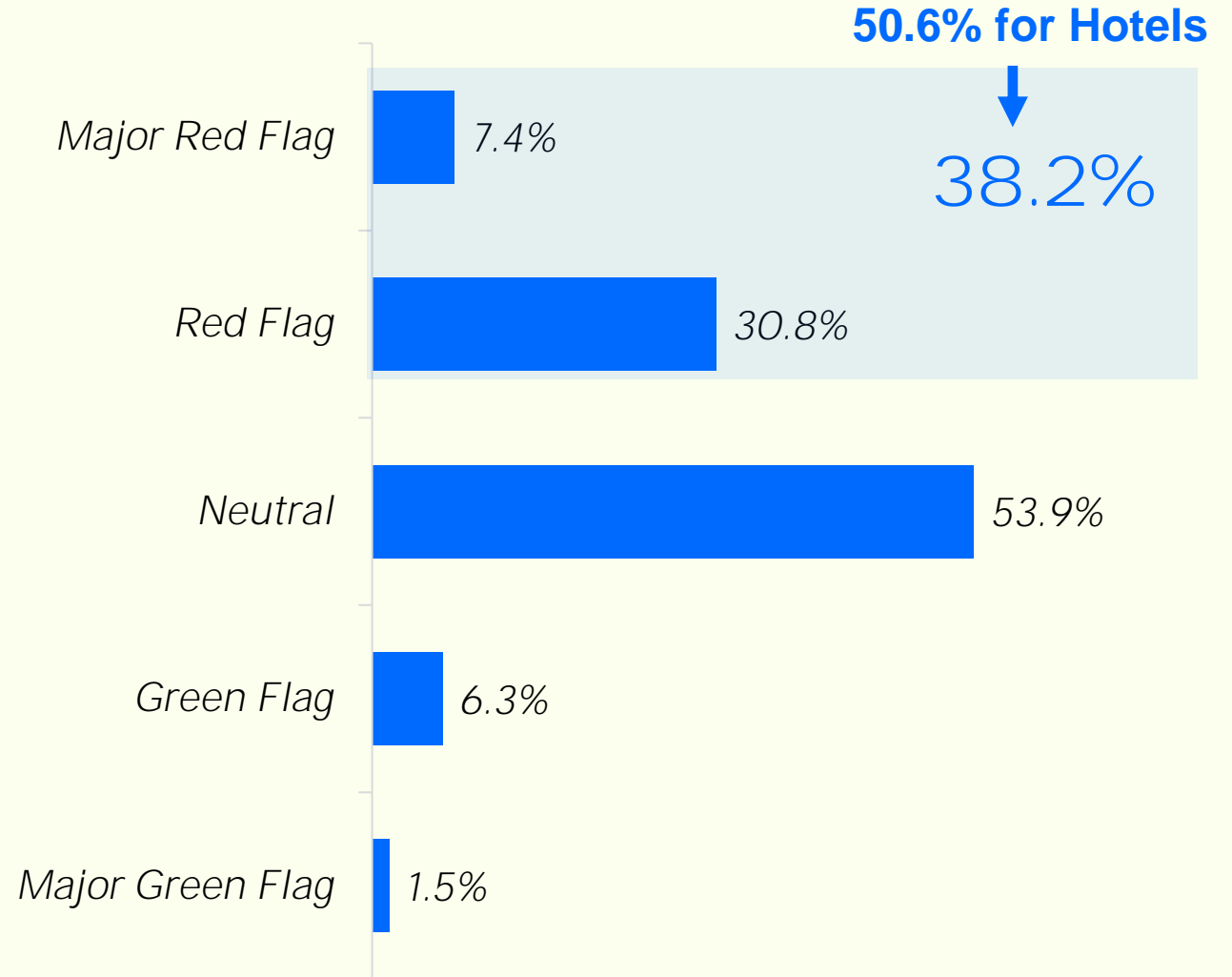
*Nightly hotel rates in this destination are about \$100 higher than you anticipated.*



# Airlines May Have More Price Wiggle Room

## Situation:

*Flights to this destination are about \$50 more expensive than you expected.*

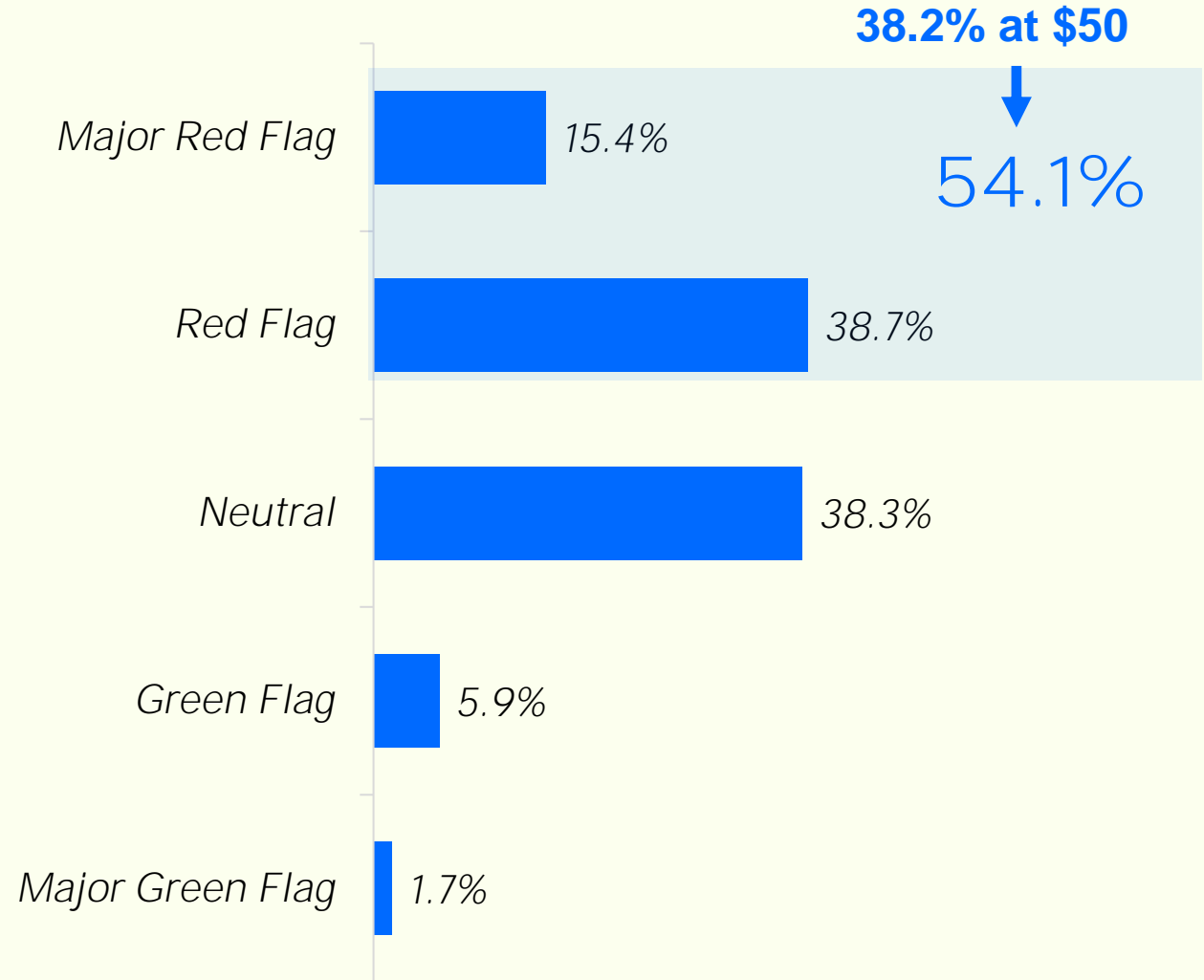




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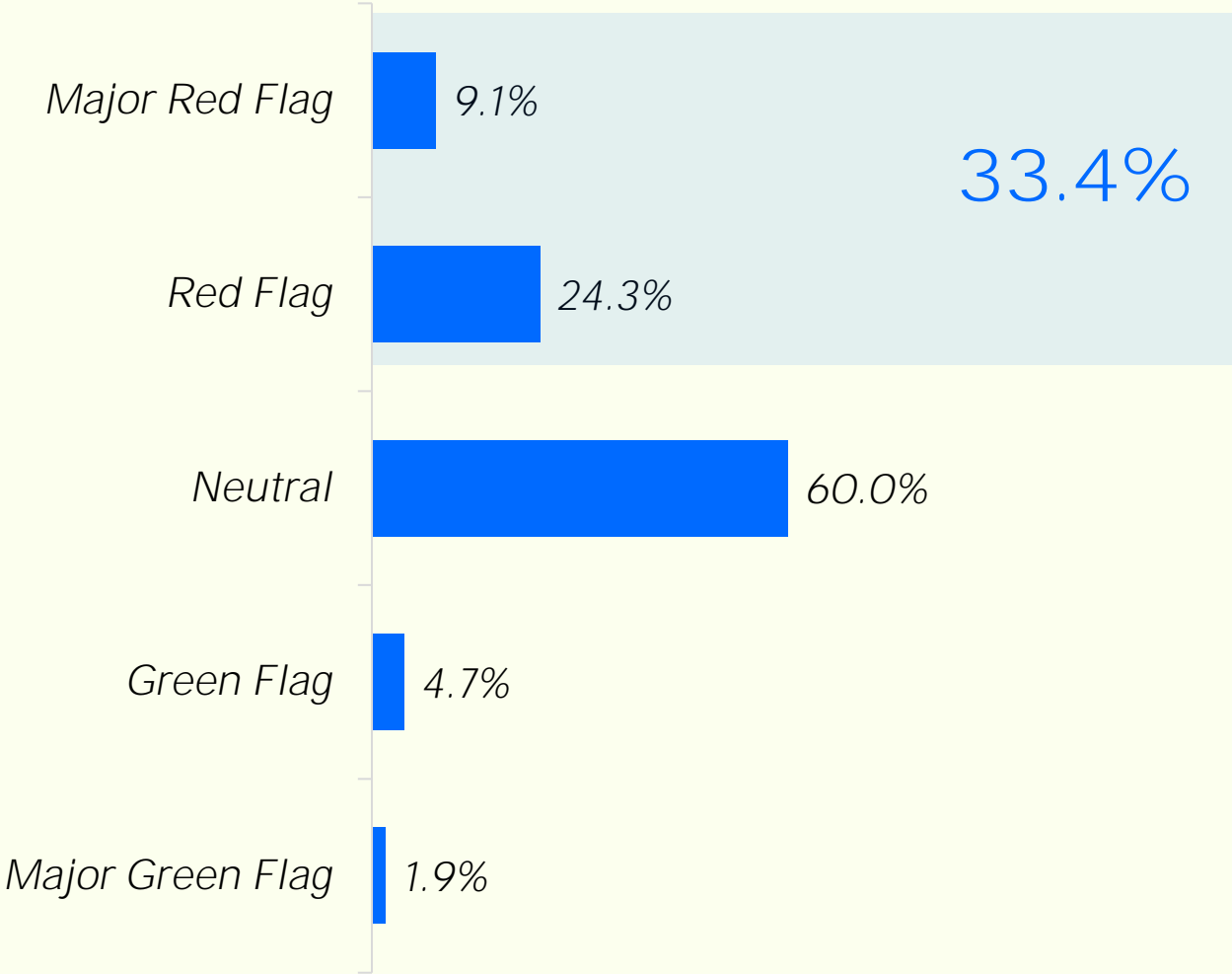
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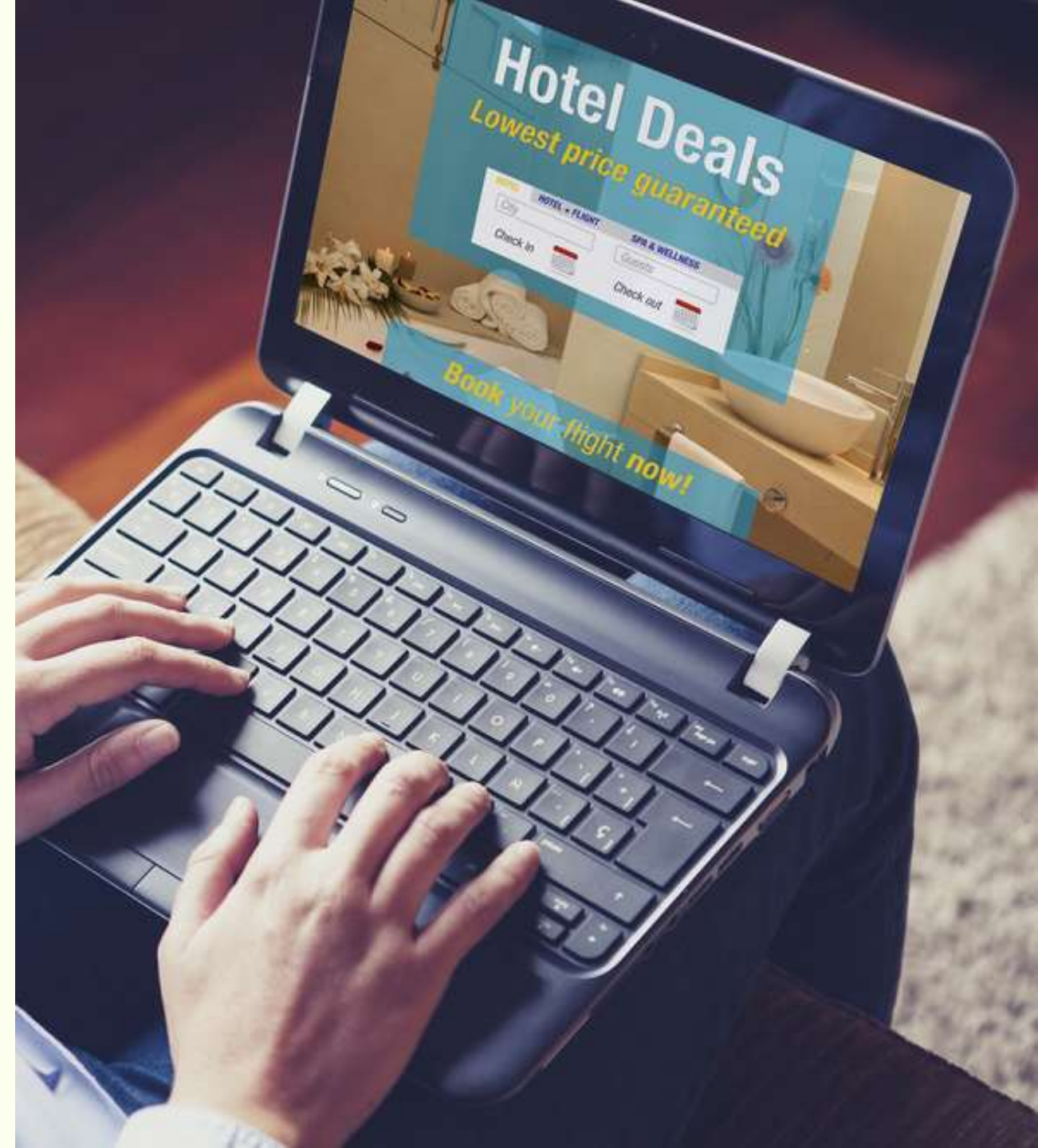
# Not being able to use hotel rewards is a red flag to about 1-in-3 travelers.

## Situation:

*I can't use my preferred hotel rewards there.*



Travelers appear to be more sensitive to higher than expected hotel prices than they are for airline tickets. Either way, price expectations not being met are a red flag to many.





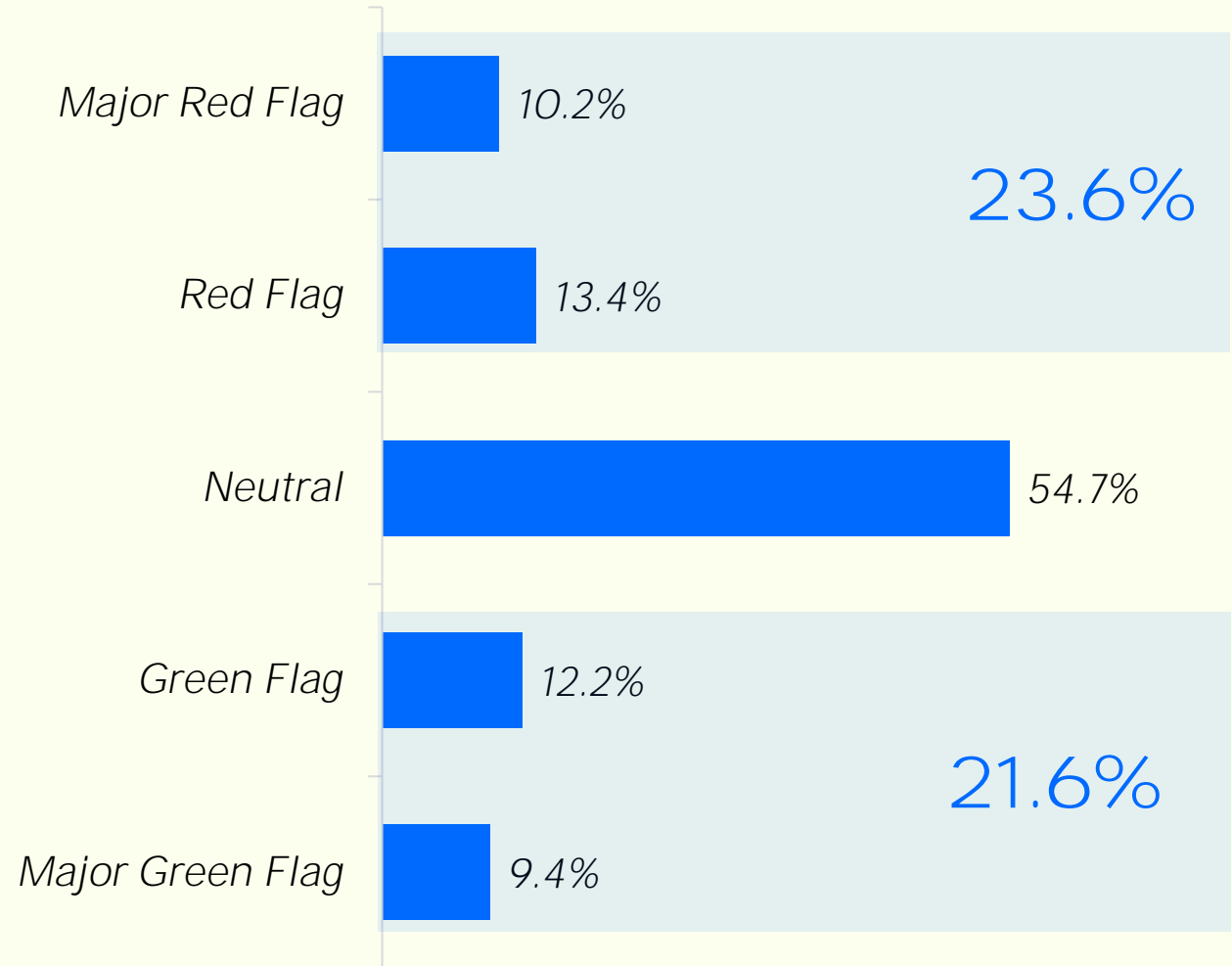
# CANNABIS



# Travelers are split on cannabis-friendly destinations.

## Situation:

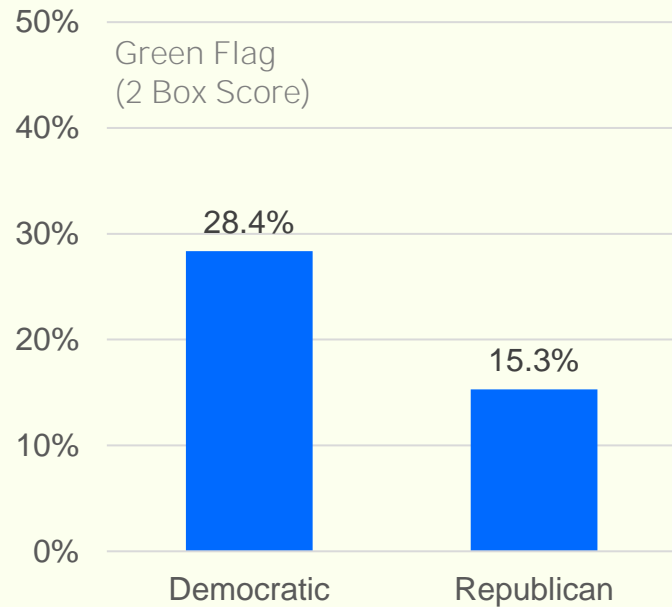
*Cannabis products are legal in the destination.*



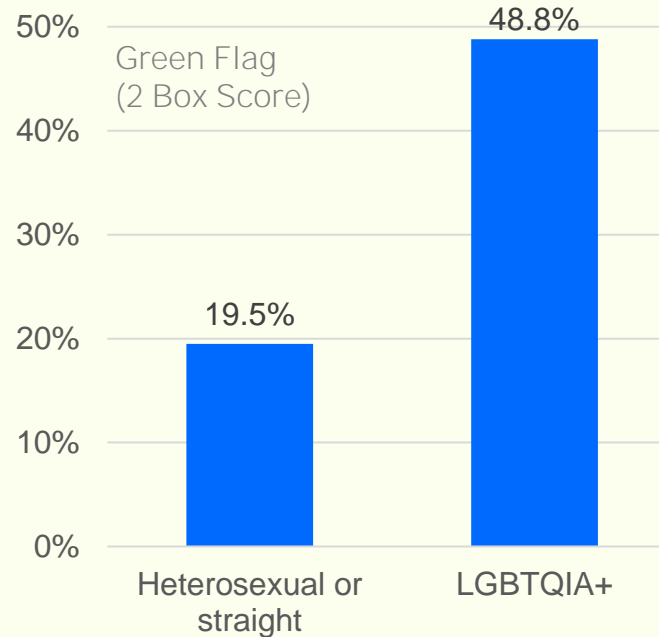
# Most demographics show little difference, too, but these three do.

Situation: *Cannabis products are legal in the destination.*

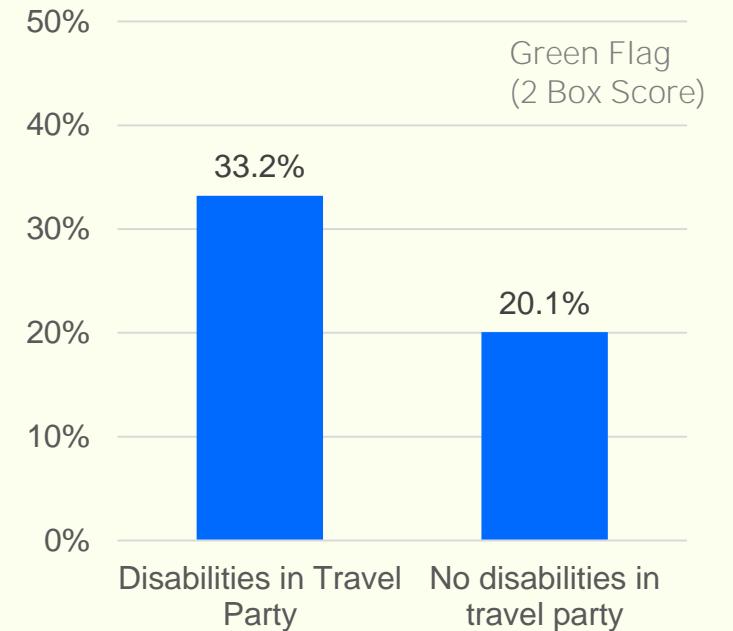
### Political Affiliation



### Orientation



### Disability Status



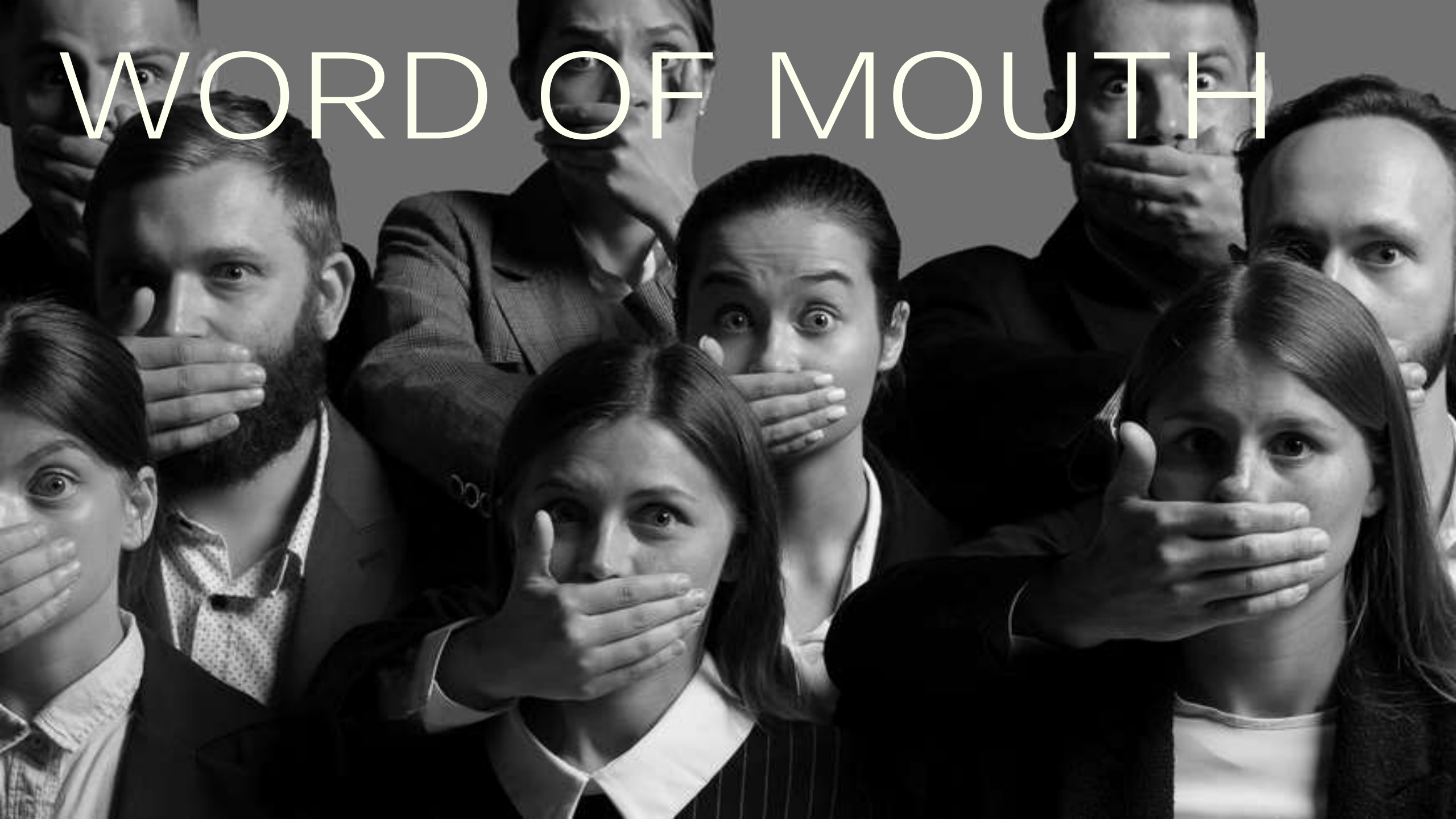




Travelers are split on legal cannabis, with equal parts liking it and disliking it.

Democrats, LGBTQIA+ and those with disabilities in their travel parties are more likely to wave a green flag.

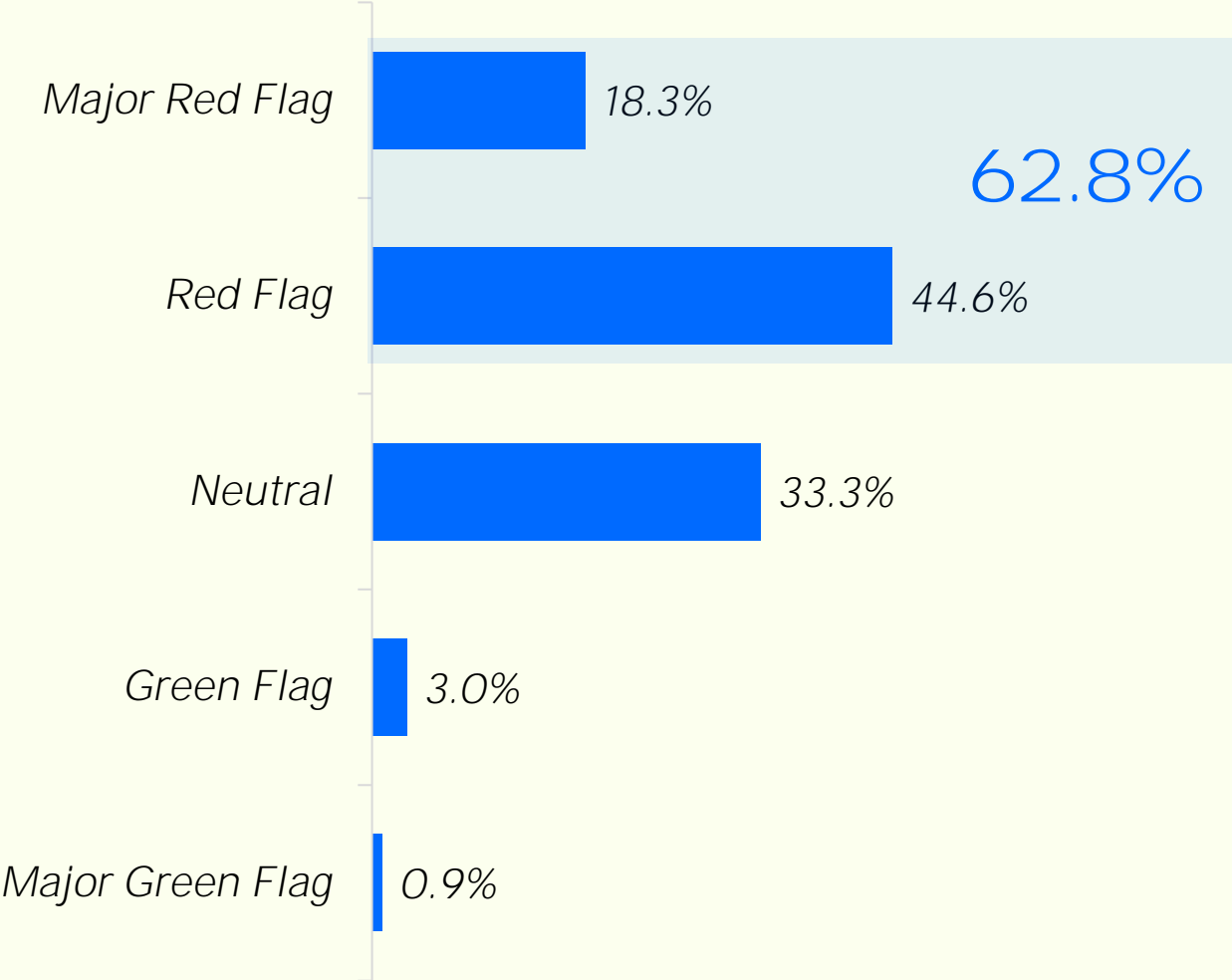
# WORD OF MOUTH



# Bad online reviews are a major red flag.

## Situation:

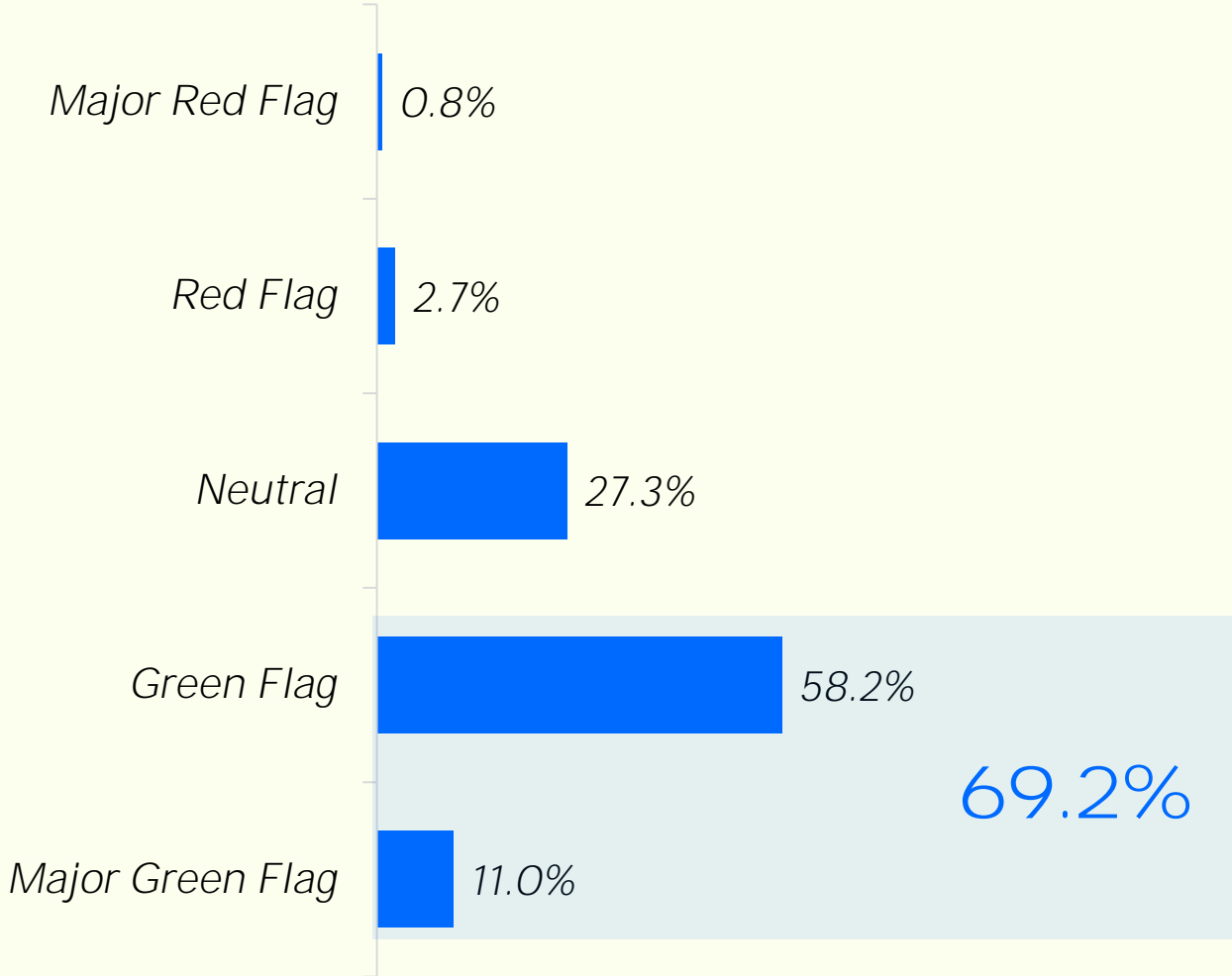
*You see some negative opinions about the destination on review websites.*



# But, positive reviews raise more green flags.

## Situation:

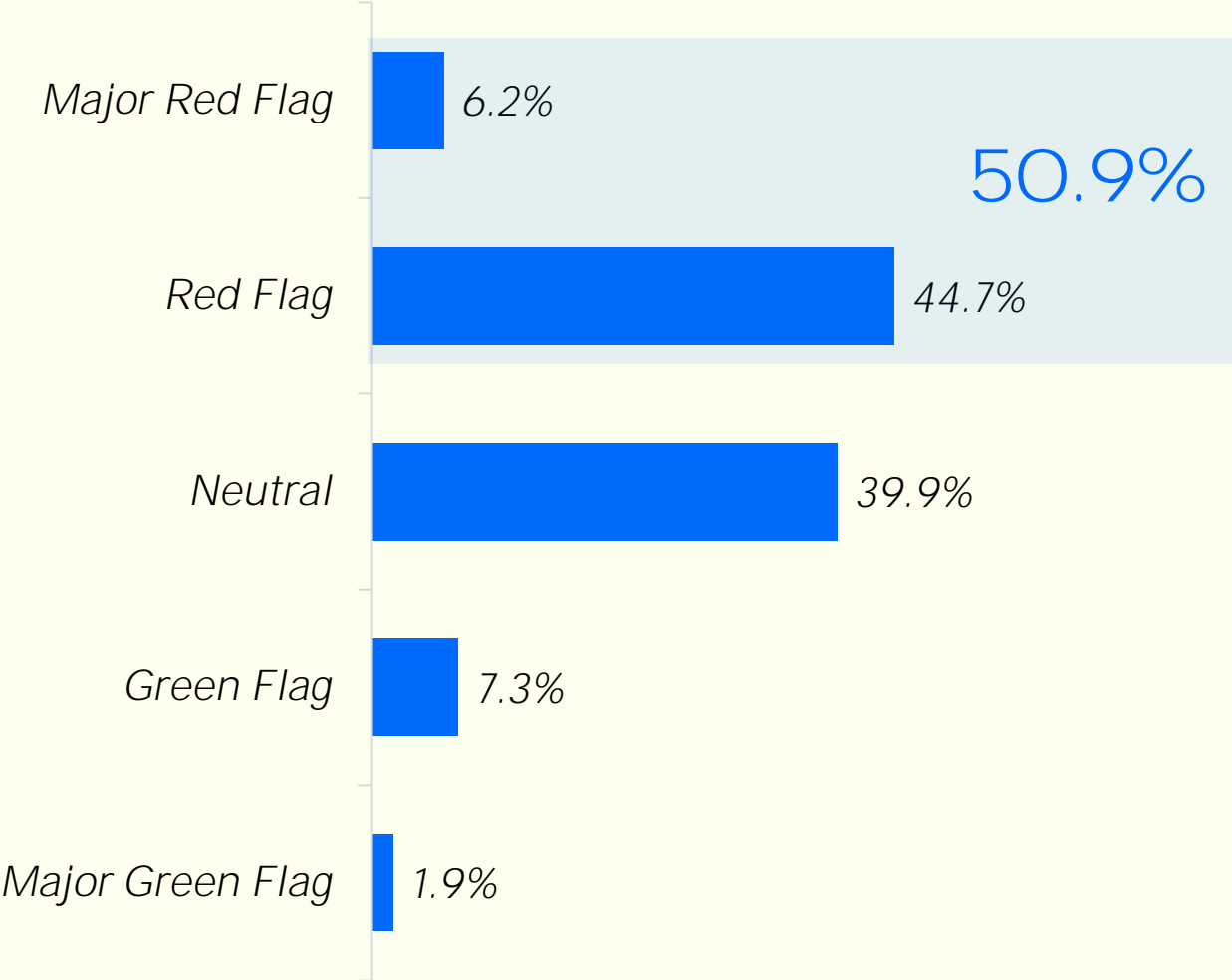
*You see some positive opinions about the destination on review websites.*



# Bad in-person word of mouth turns off about half of the traveling public.

## Situation:

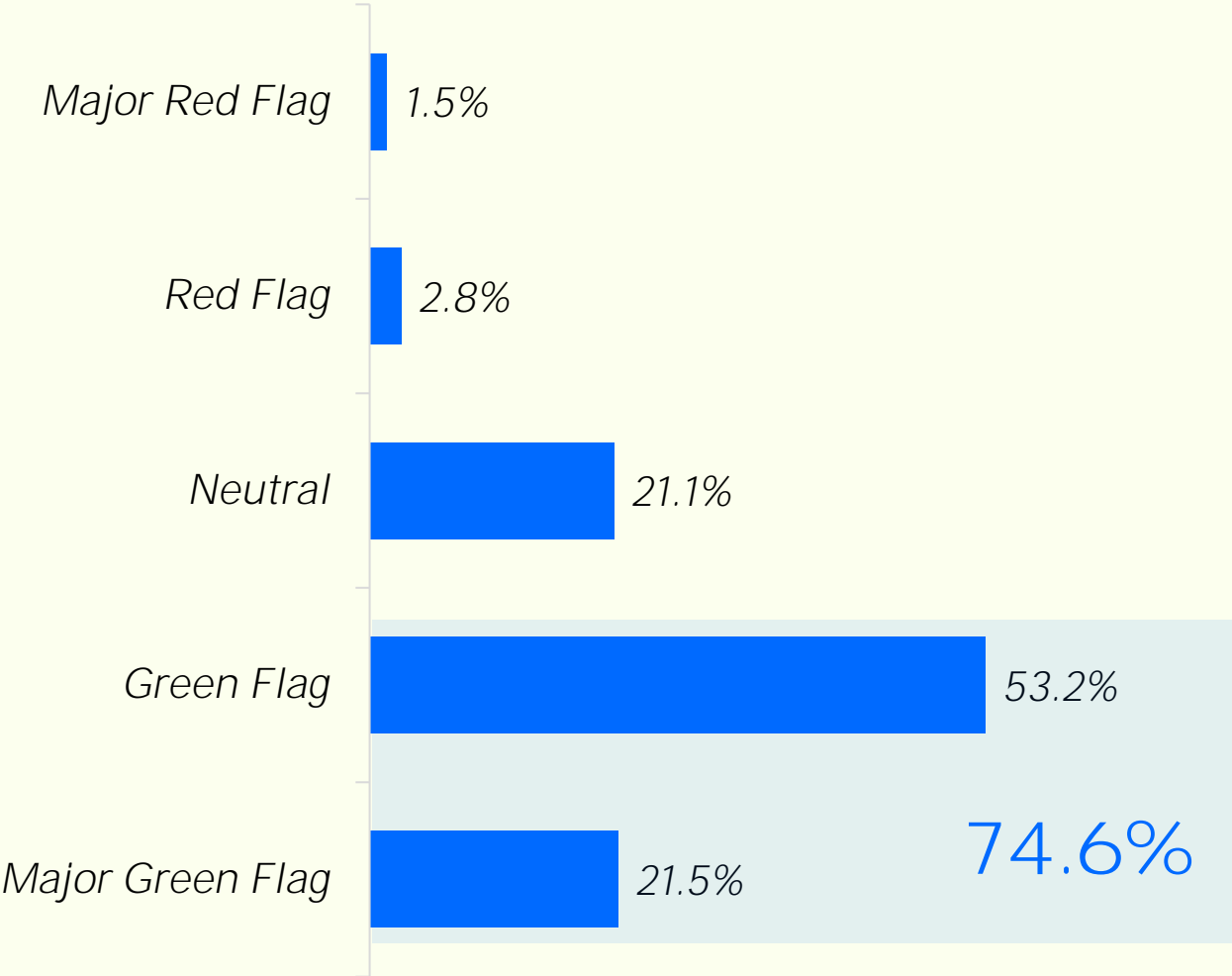
*A trusted friend tells you the destination is "over-rated."*



# Good word of mouth turns on about 75% of the traveling public.

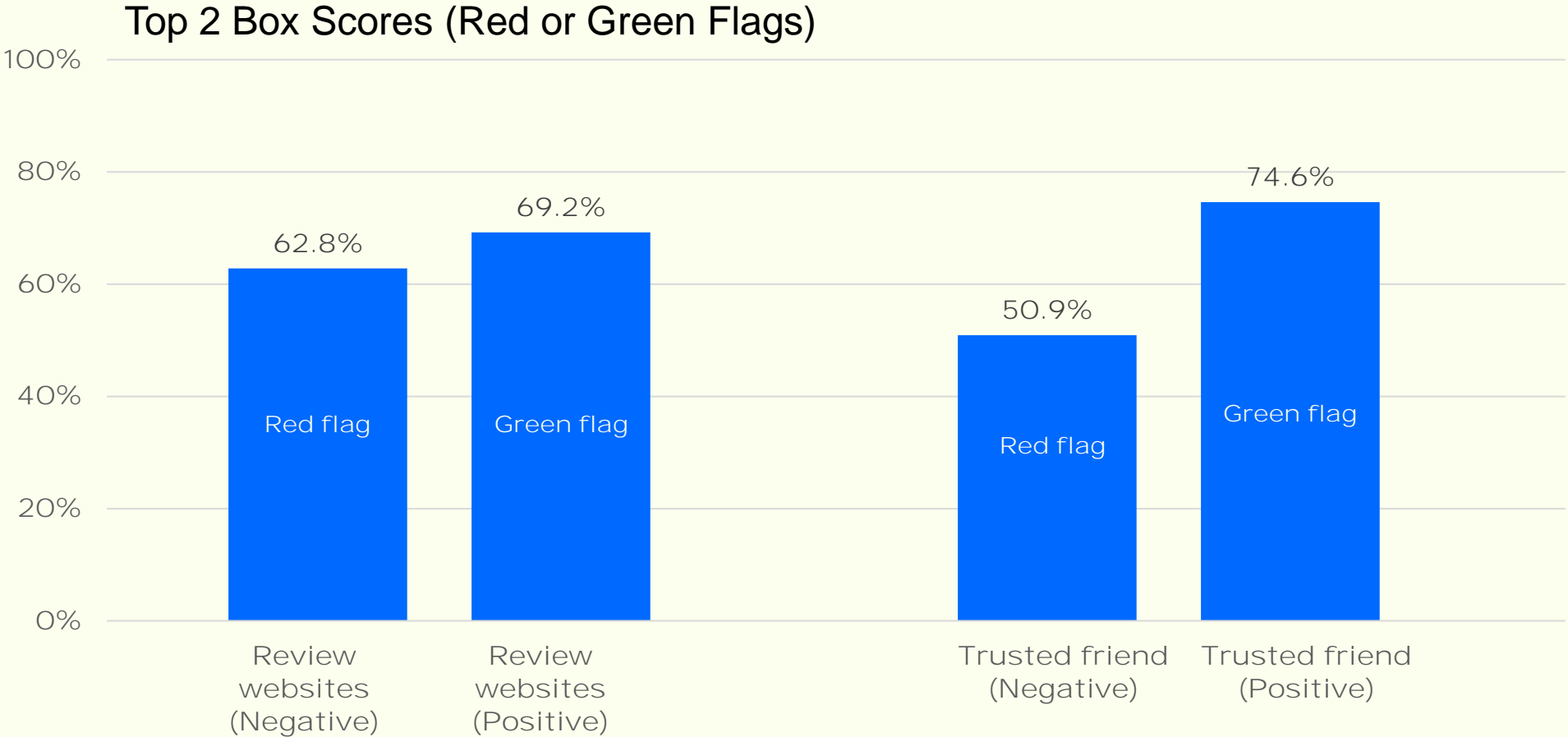
## Situation:

*A trusted friend tells you that you'd love the destination.*





# Positive word of mouth may be somewhat more impactful than negative.





Positive online reviews may be slightly more impactful than bad ones.

Nearly 70 percent say a good personal recommendation is a green flag, while only about half (50.9%) say a bad review from a friend is a red flag.

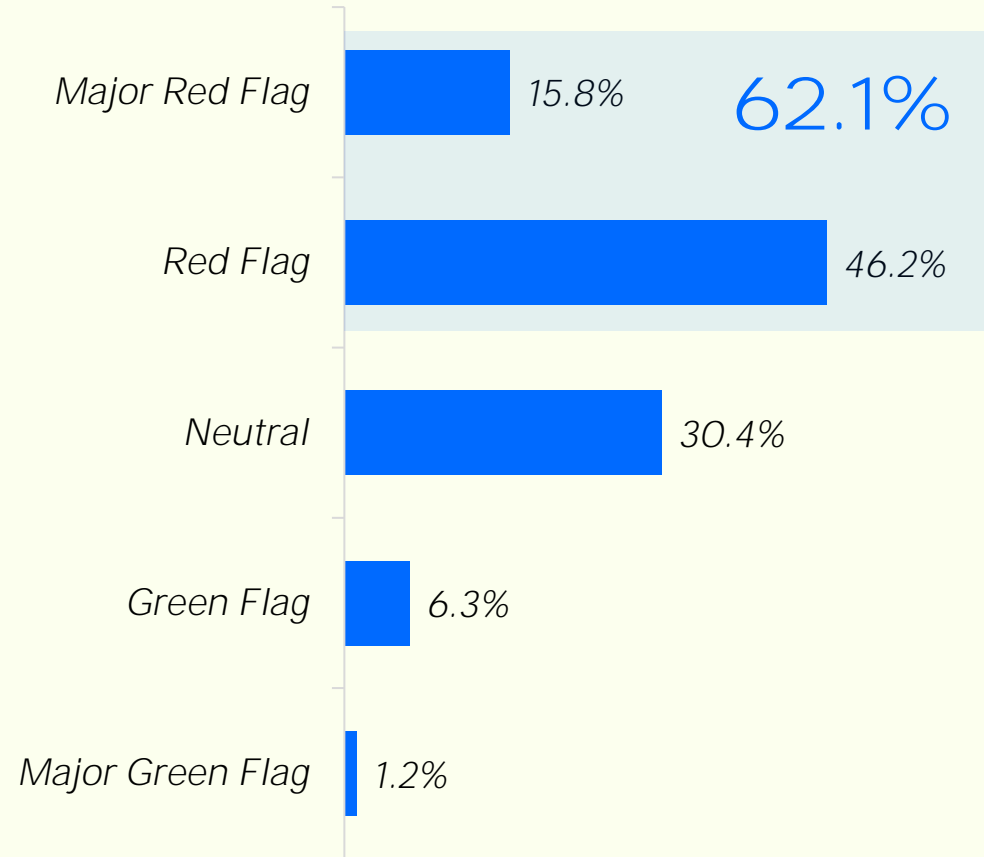




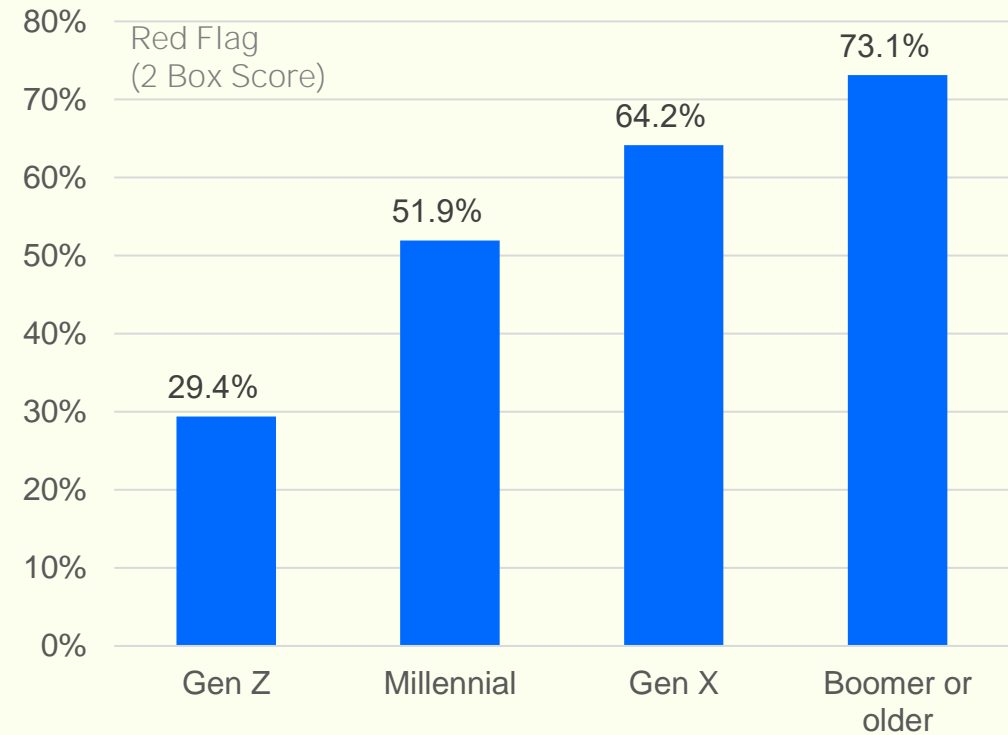
# DESTINATION MANAGEMENT ISSUES

# Crowds turn-off older travelers the most

Situation: *It seems like a place that is busy (or even over-crowded) when you want to travel.*



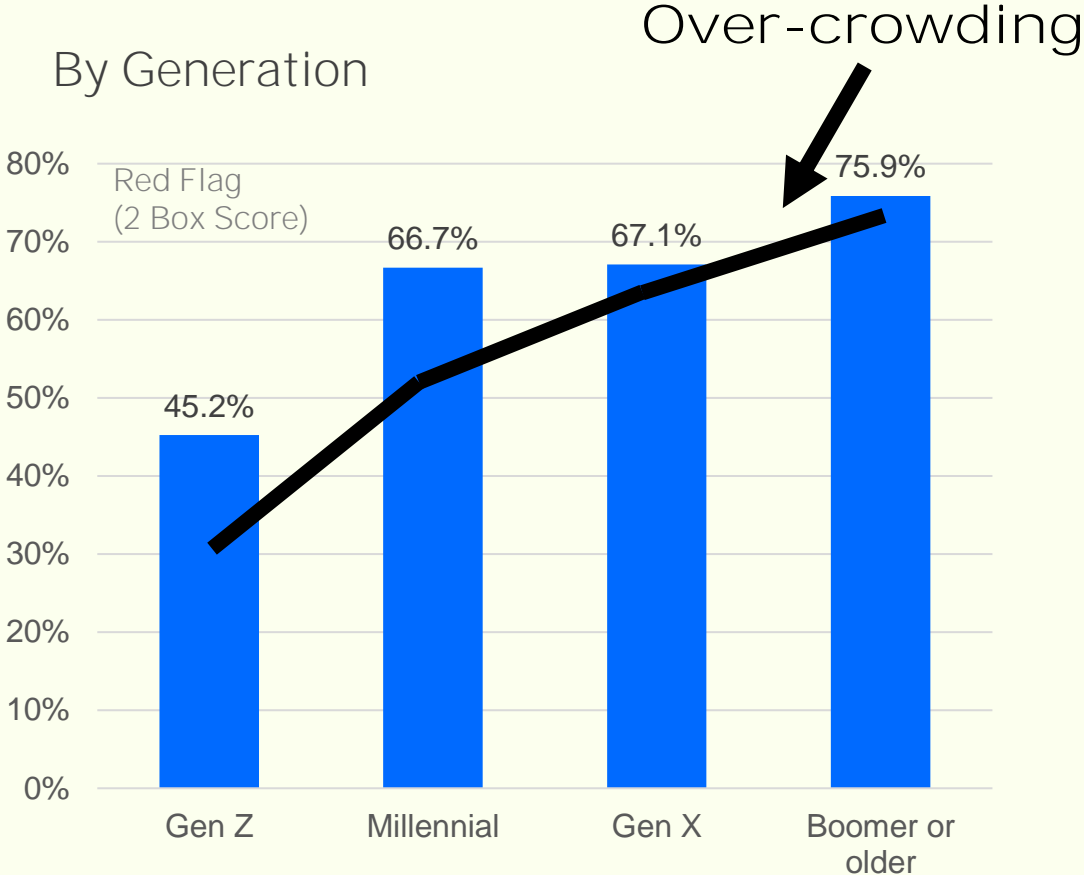
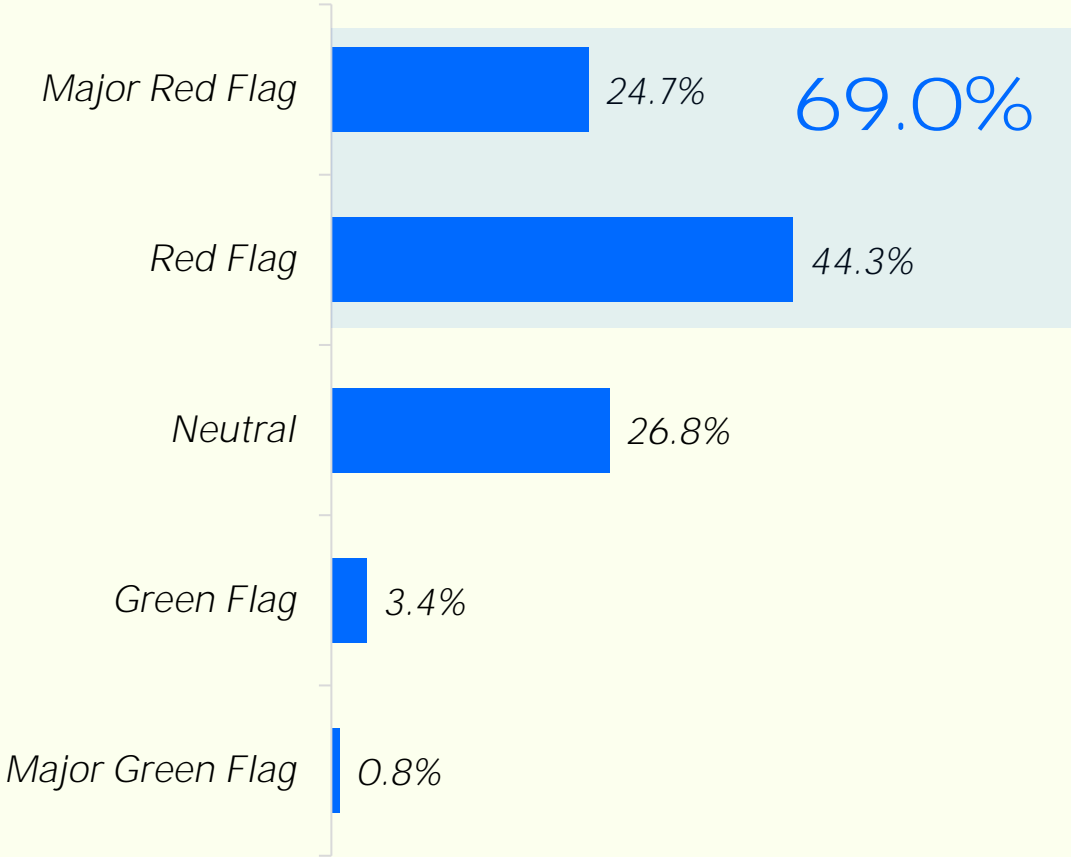
## By Generation





# Hard pass: Travelers don't like unwelcoming locals.

Situation: *You hear local residents might have anti-tourism feelings.*





Travelers generally give overcrowding a red flag, but this sentiment is most profoundly seen in older travelers.

An anti-tourism sentiment in local residents is also a significant turn-off.



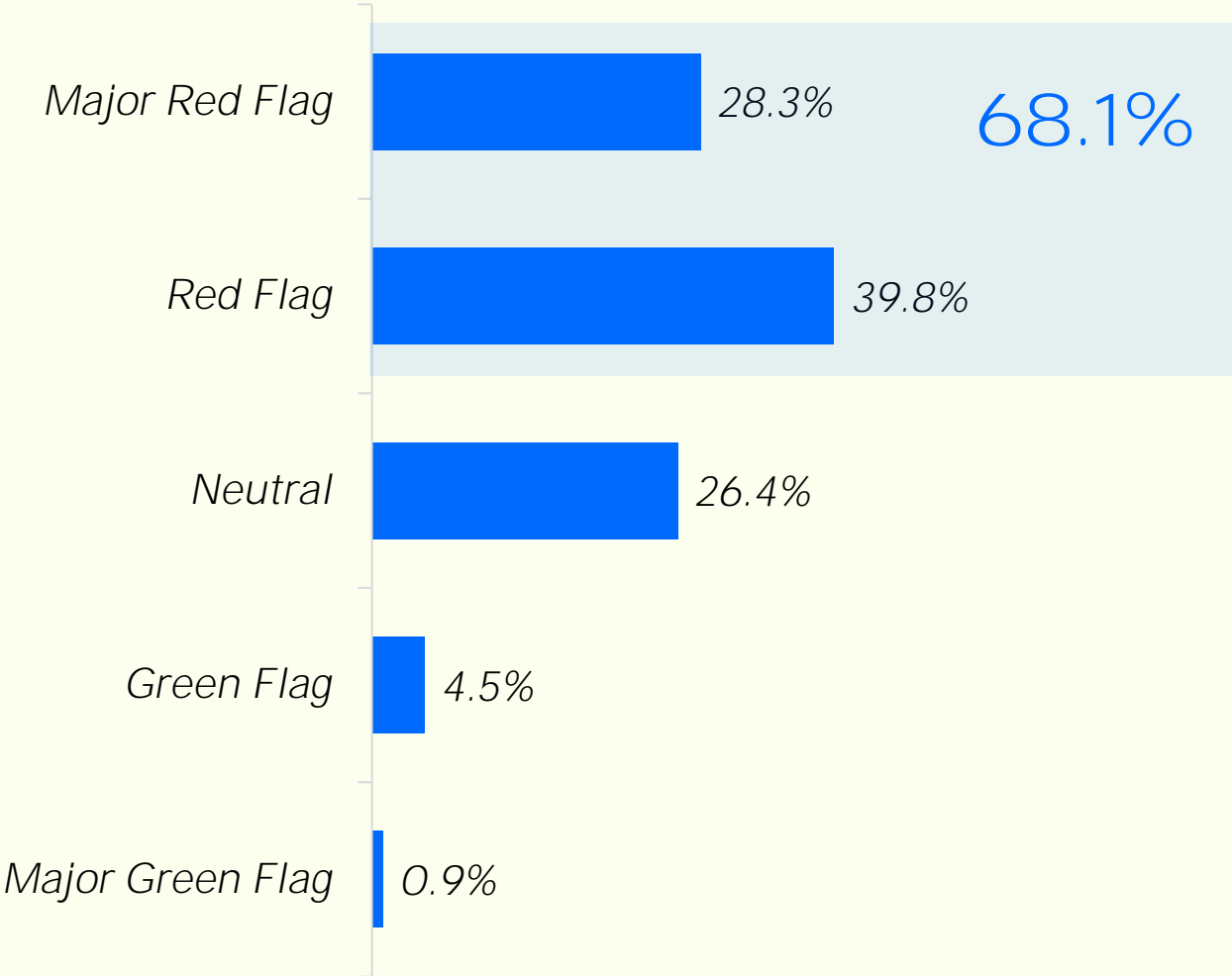
# NATURAL DISASTERS

A photograph of a forest at night. The trees are dark silhouettes against a bright orange and yellow glow, suggesting a fire or a very bright light source in the distance. The ground is dark, and there are some small lights visible in the background, possibly from a building or a fire.

# Risk Detected: Most travelers are hesitant to visit a place that's had a recent natural disaster.

## Situation:

*The area was recently impacted by a natural disaster (such as a wildfire or hurricane.)*

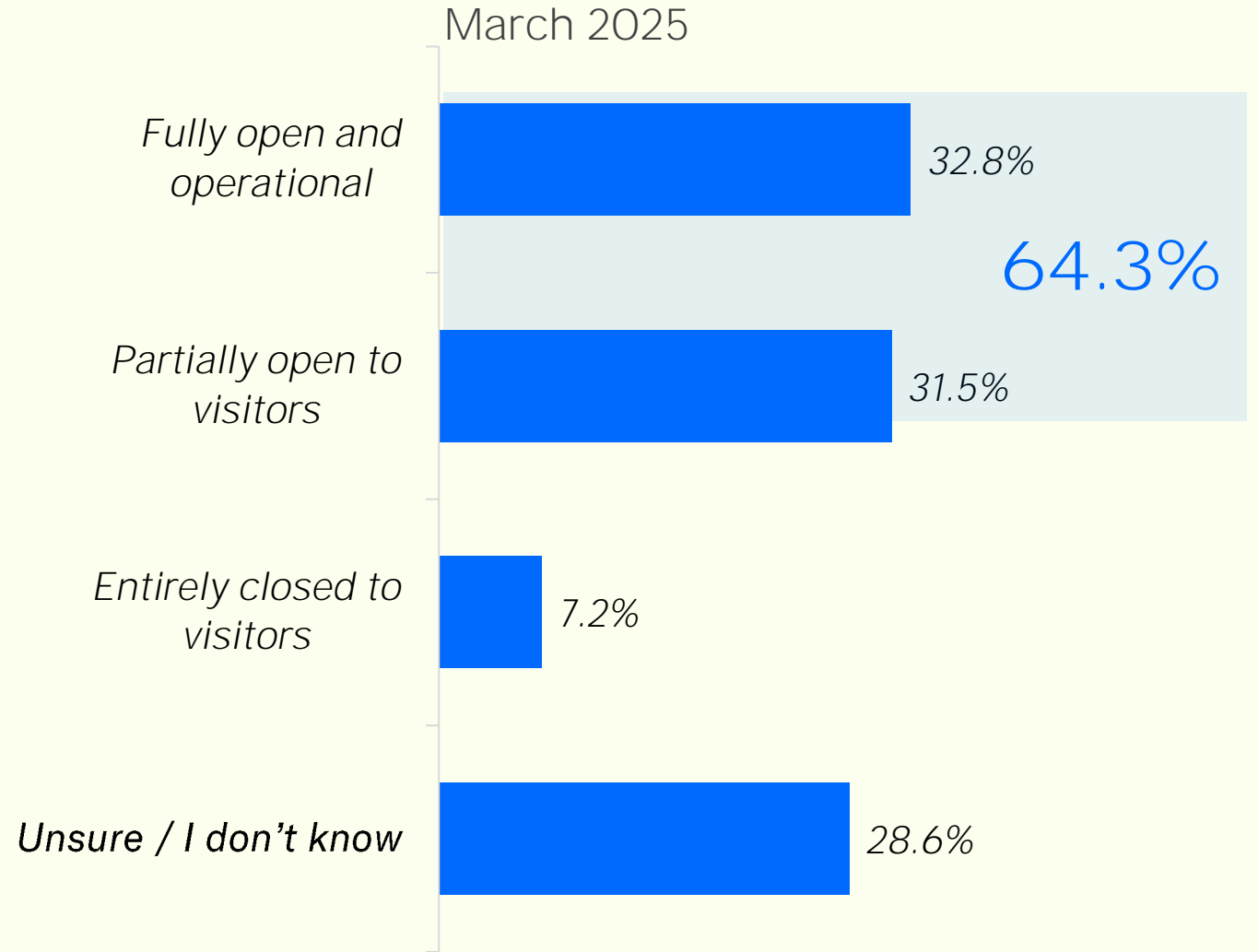
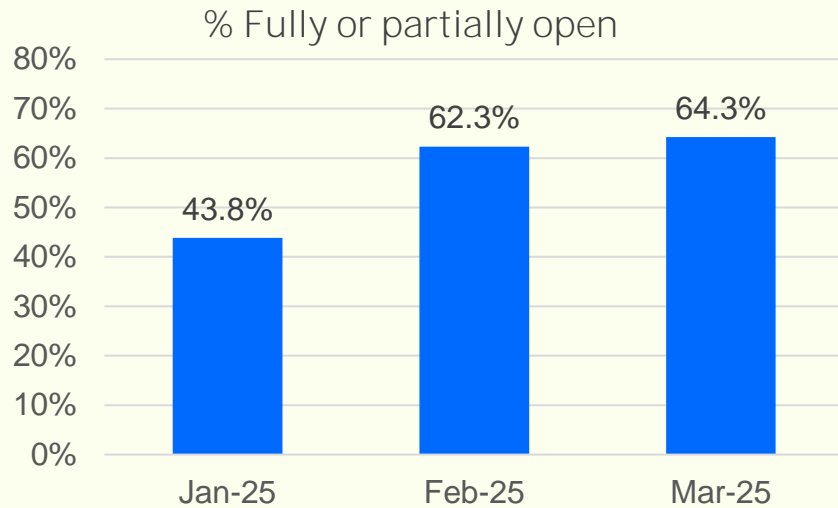




# Los Angeles Case Study

**Question:** Which best describes your perception of Los Angeles in the wake of recent wildfires?

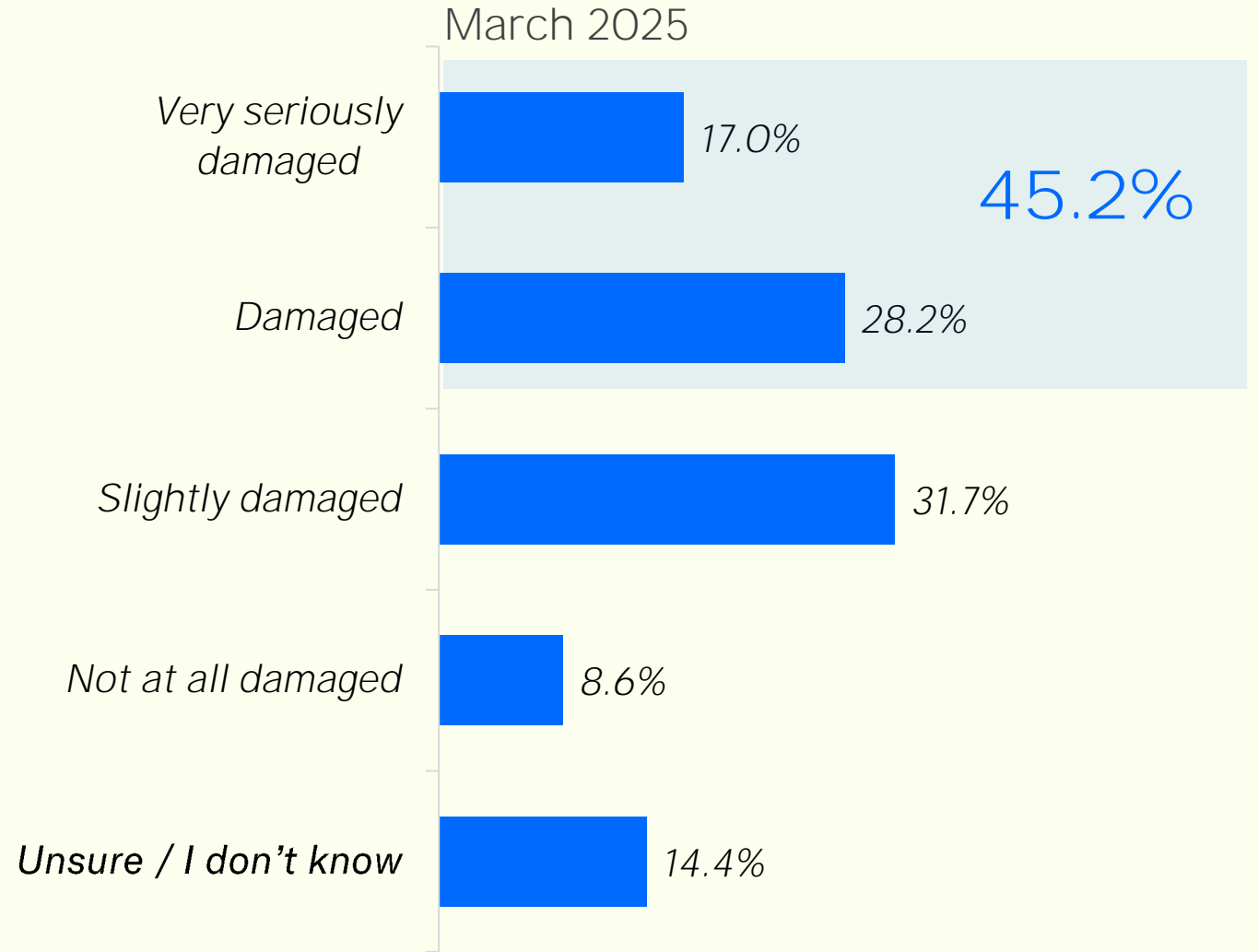
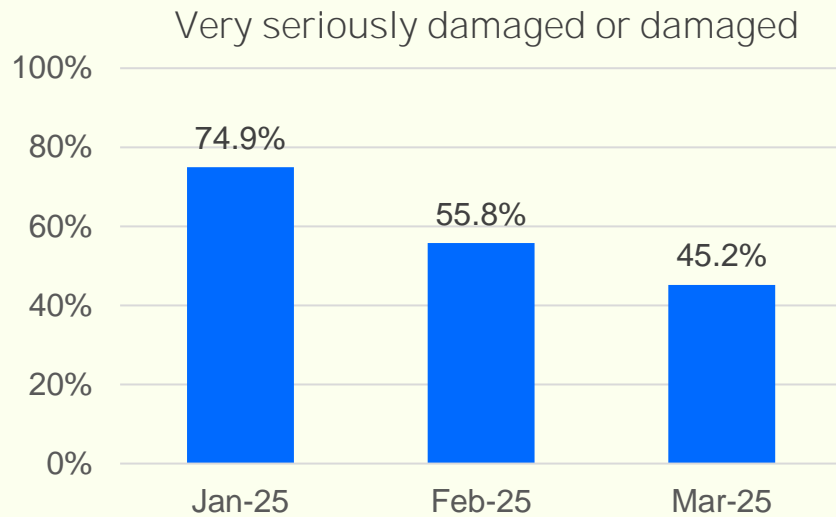
Right now, Los Angeles is \_\_\_\_\_.



# Los Angeles Case Study

**Question:** Which best describes your feelings about what visitors to Los Angeles will experience in the wake of recent wildfires?

Right now, the visitor experience in Los Angeles is \_\_\_\_\_ by the wildfires.



Natural disasters have immediate devastating impacts to a community, but the lingering impacts **on the community's** tourism industry can also be profound.



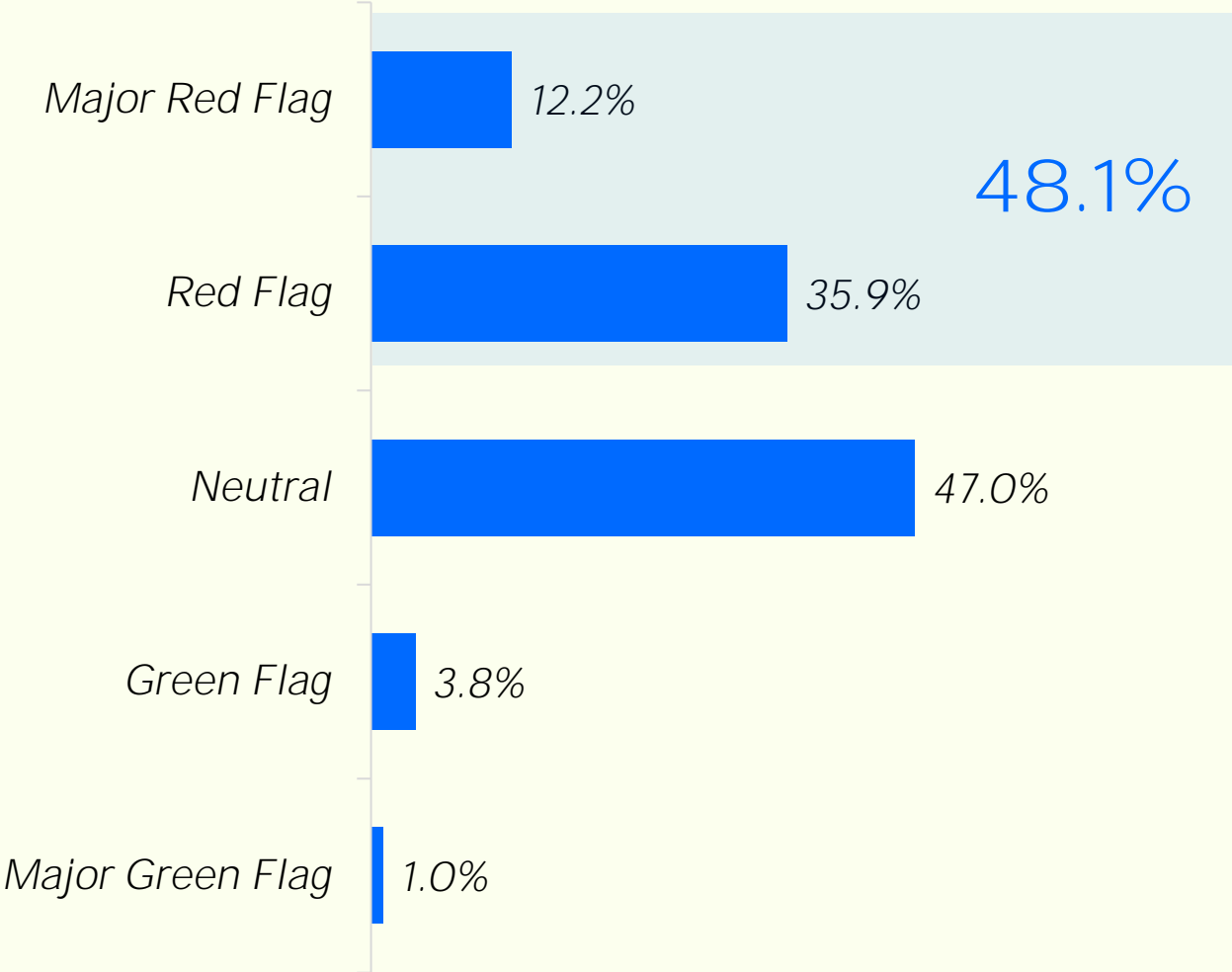
# AIRPORTS



# A lack of direct flights is a red flag to about half of travelers.

## Situation:

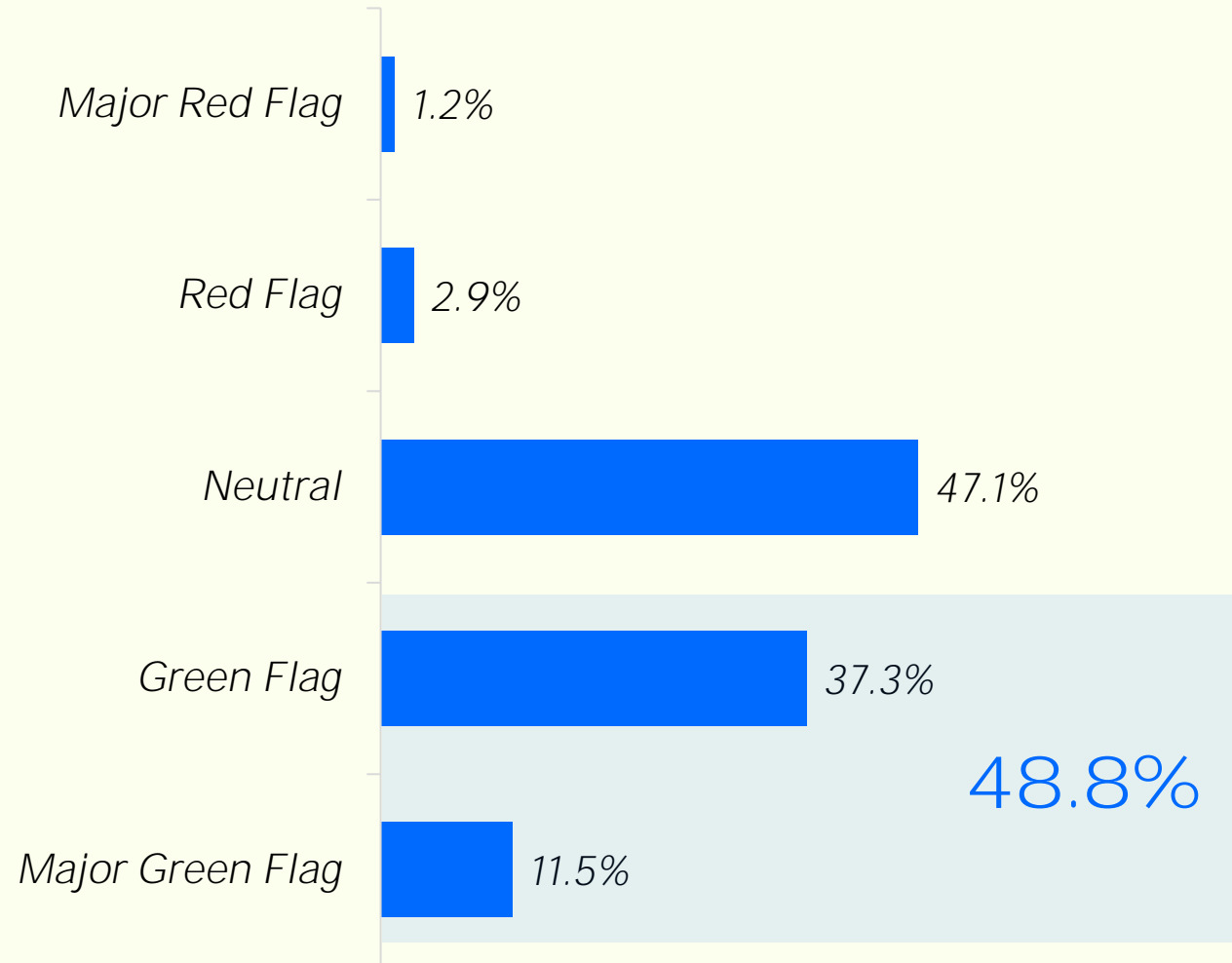
*There are no (or too few) direct flights to the destination.*



# About half also consider a fantastic airport a plus—and give this a green flag.

Situation:

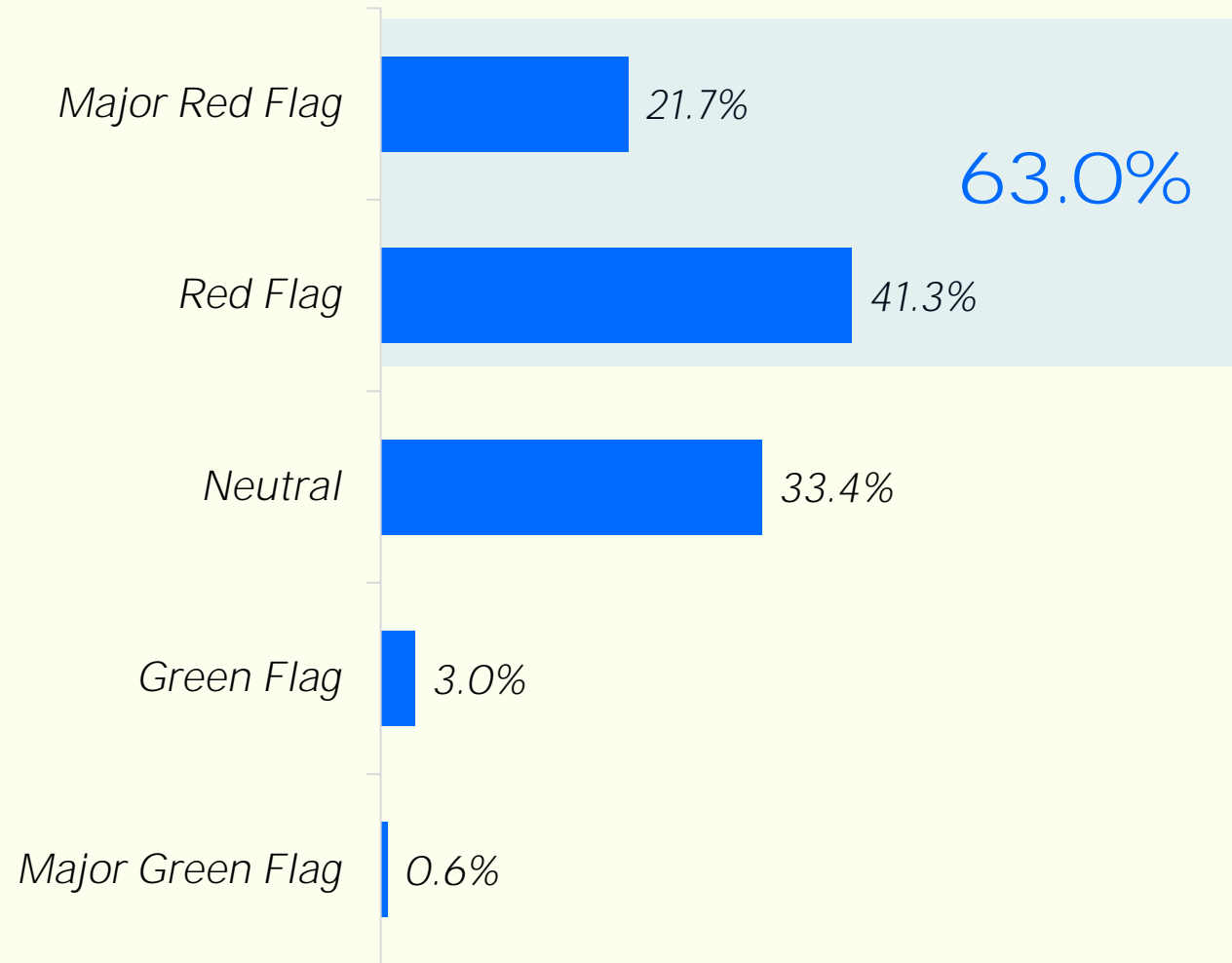
*The destination has a fantastic airport*



# Even more (63%) consider an airport with a bad reputation a negative.

## Situation:

*The destination's airport has a bad reputation.*







Airports matter, big time. A lack of direct flights and a bad reputation are turn-offs to many travelers, 48.1% and 63.0%, respectively. A good airport is also a green flag to about half the traveling public.

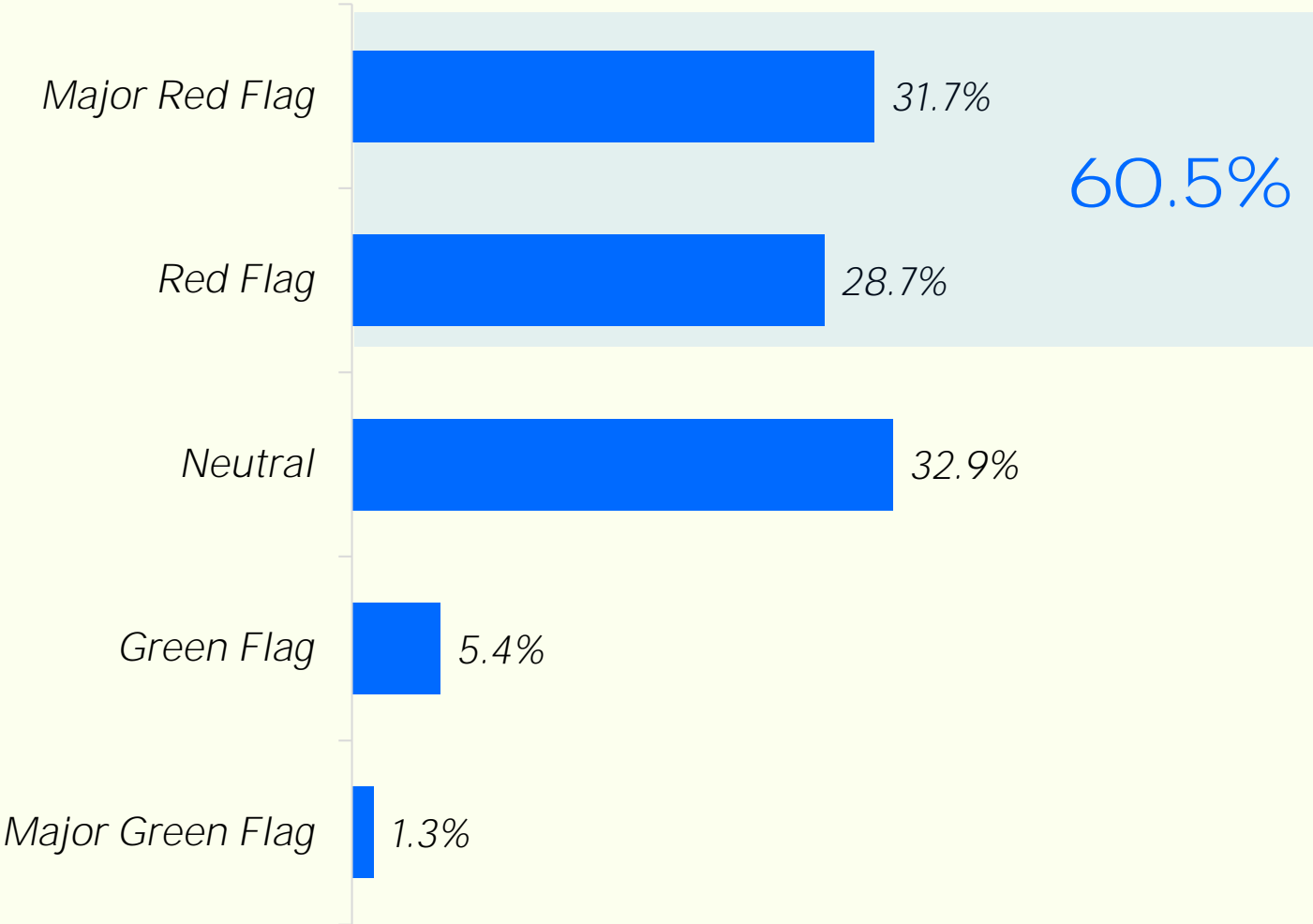
# IMAGERY



# Cue the Cringe—AI-Generated Imagery Doesn't Sit Well

## Situation:

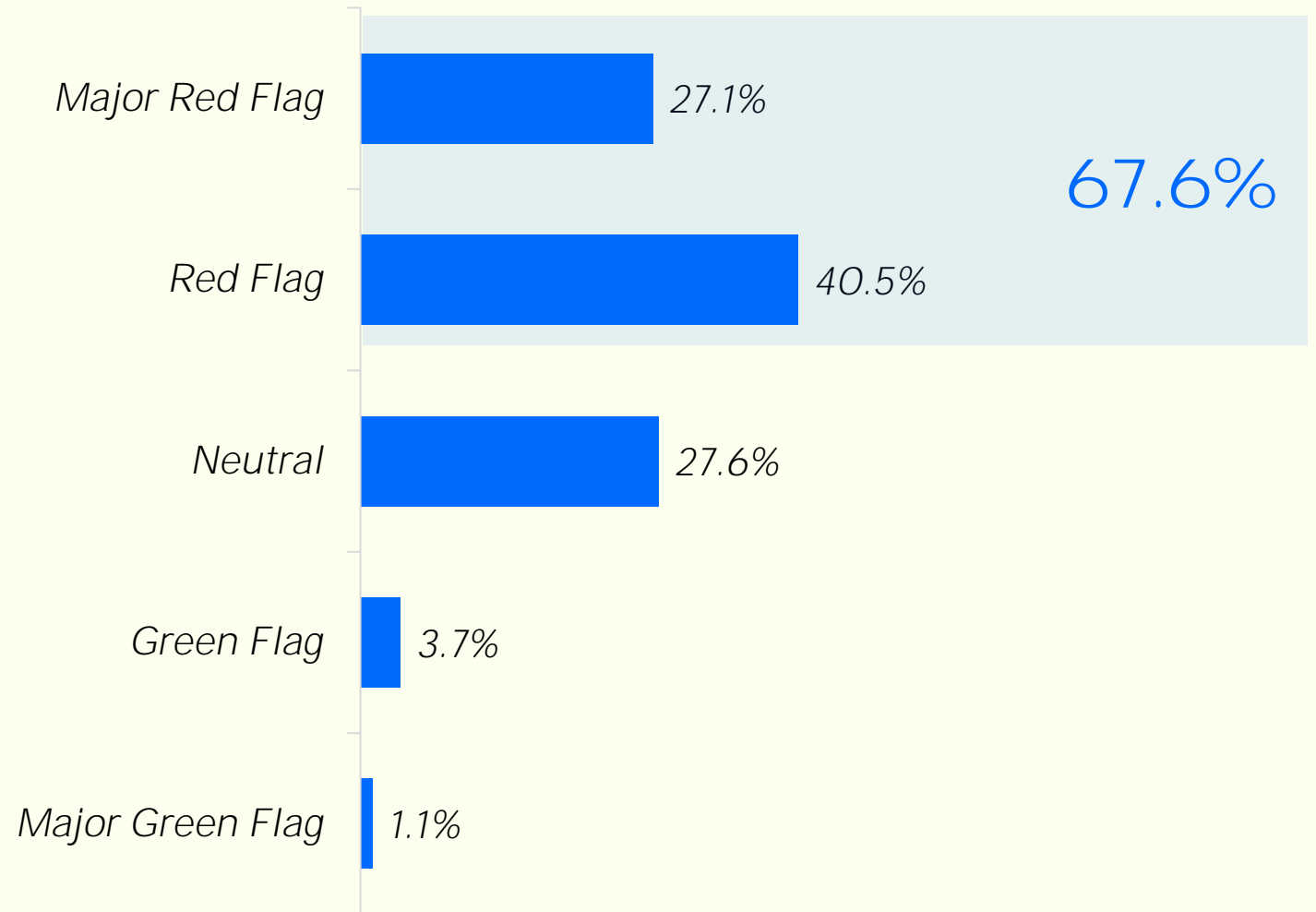
*Promotional photos of the destination are Artificial Intelligence (AI) generated.*



# Nope, Nope, and More Nope. Avoid over-processed photography.

## Situation:

*Promotional photos of the destination are heavily edited/photoshopped.*





Keep it authentic. Great photography still matters.





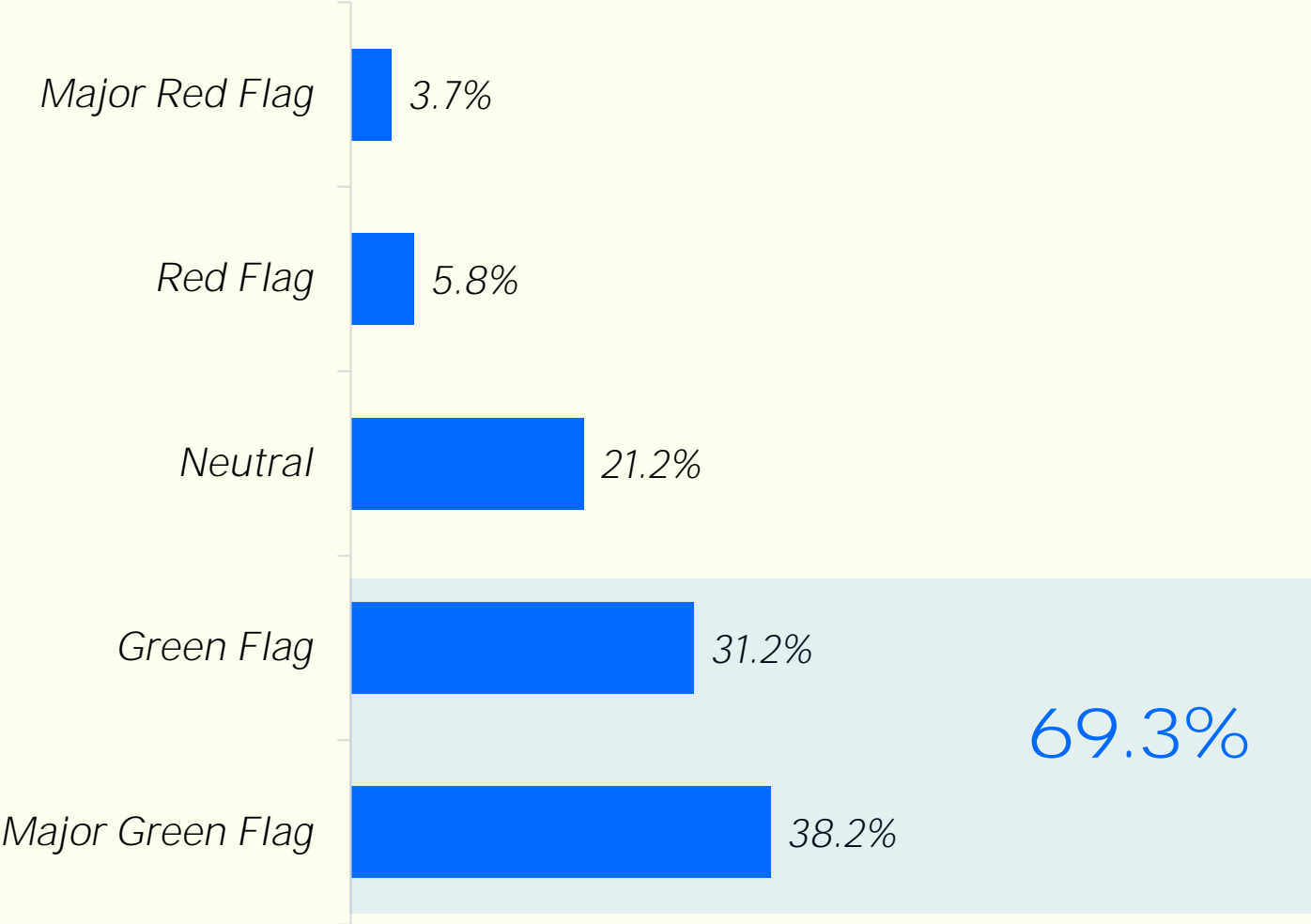
# HAPPY CHILDREN



# This One's Might be a Good Selling Point.

## Situation:

*It seems like a place where my kids would actually put their screens down.*

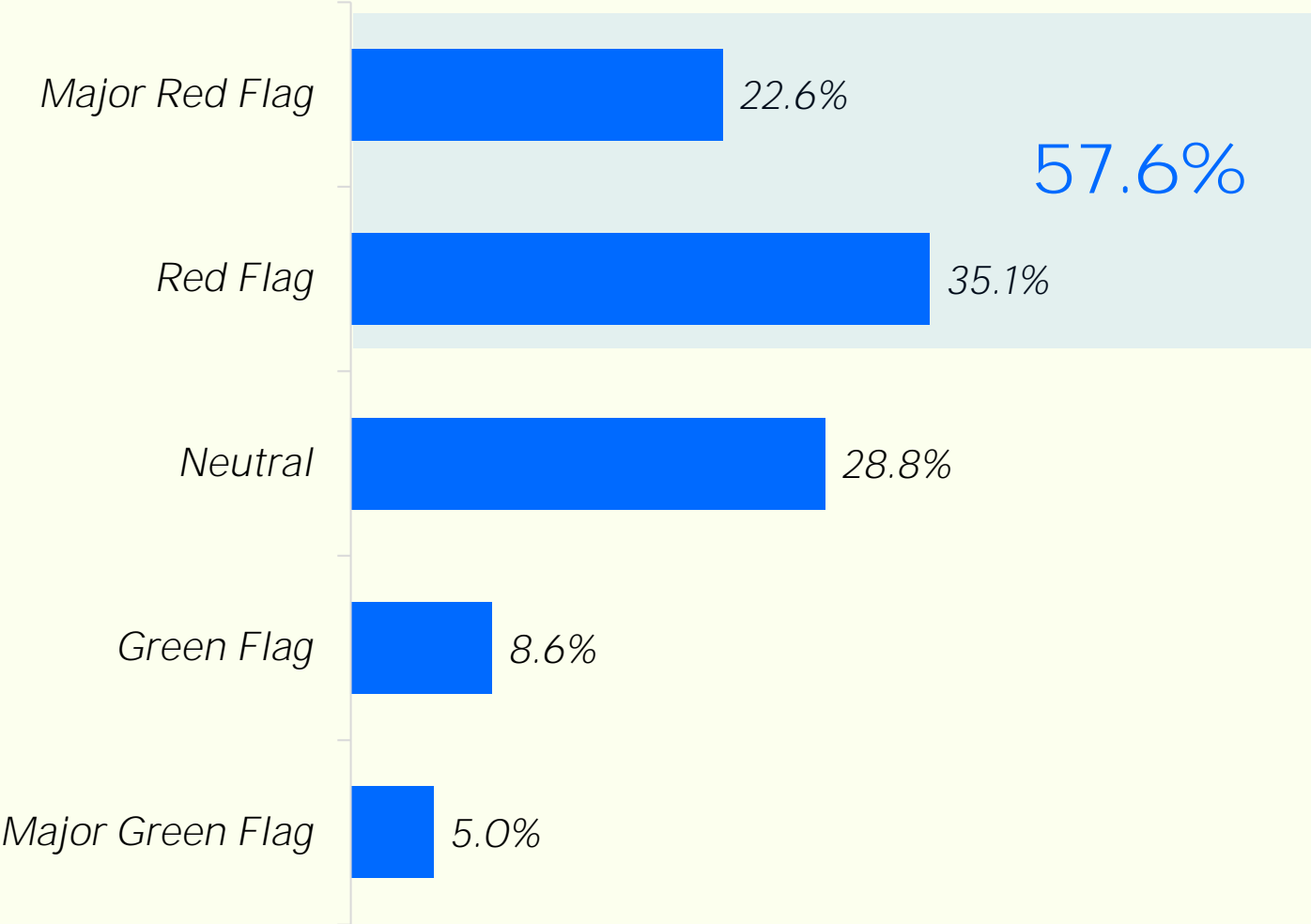




# Unexcited kids are a big travel turn-off.

## Situation:

*My kids wouldn't be excited about this destination.*



Amongst the parental class, making the kids happy is important, but getting them to disengage from their screens might be even more emotionally appealing. Think about this nuance when developing your messaging.



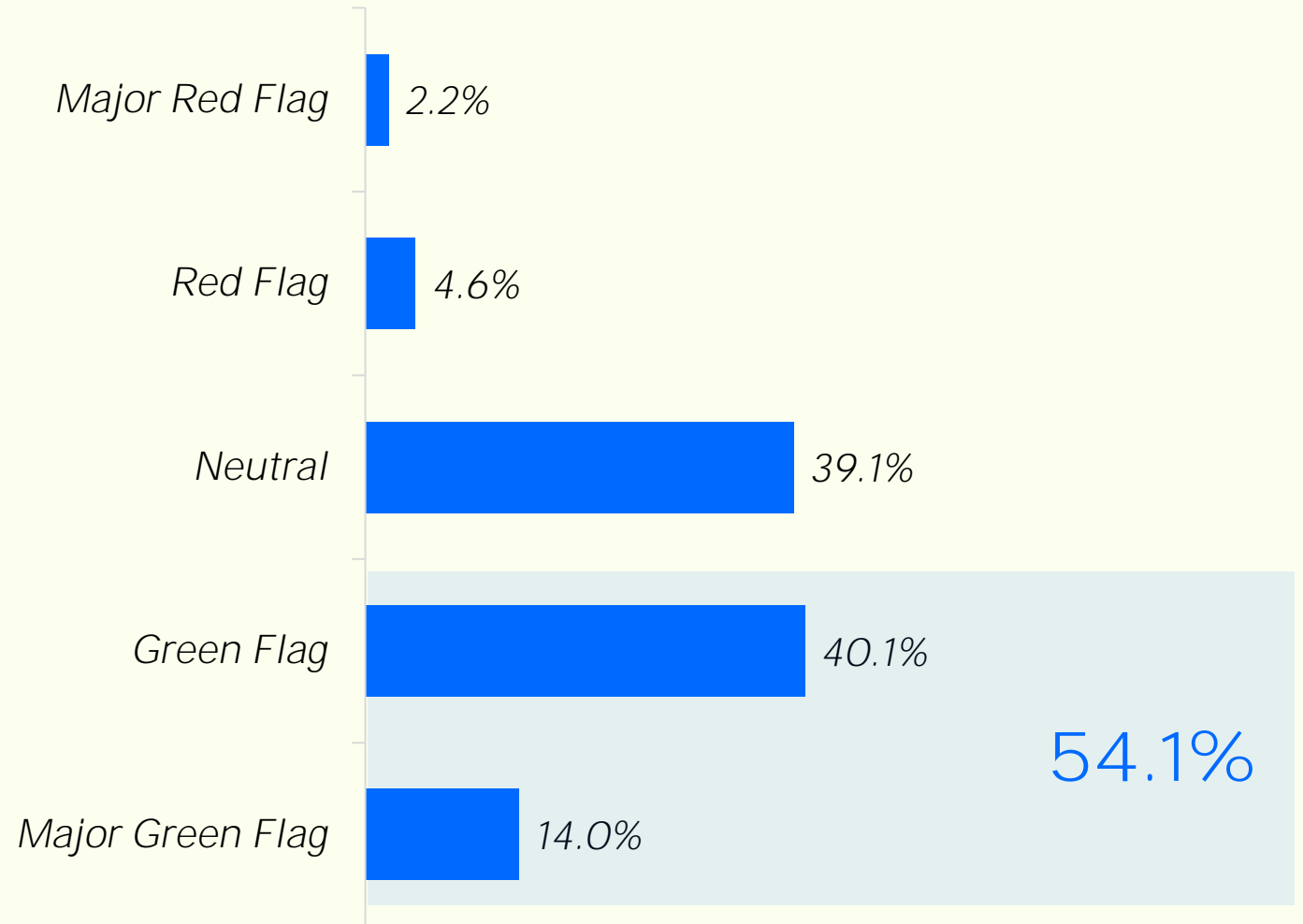
# FOOD FLAGS



# A cutting-edge food scene is widely popular.

## Situation:

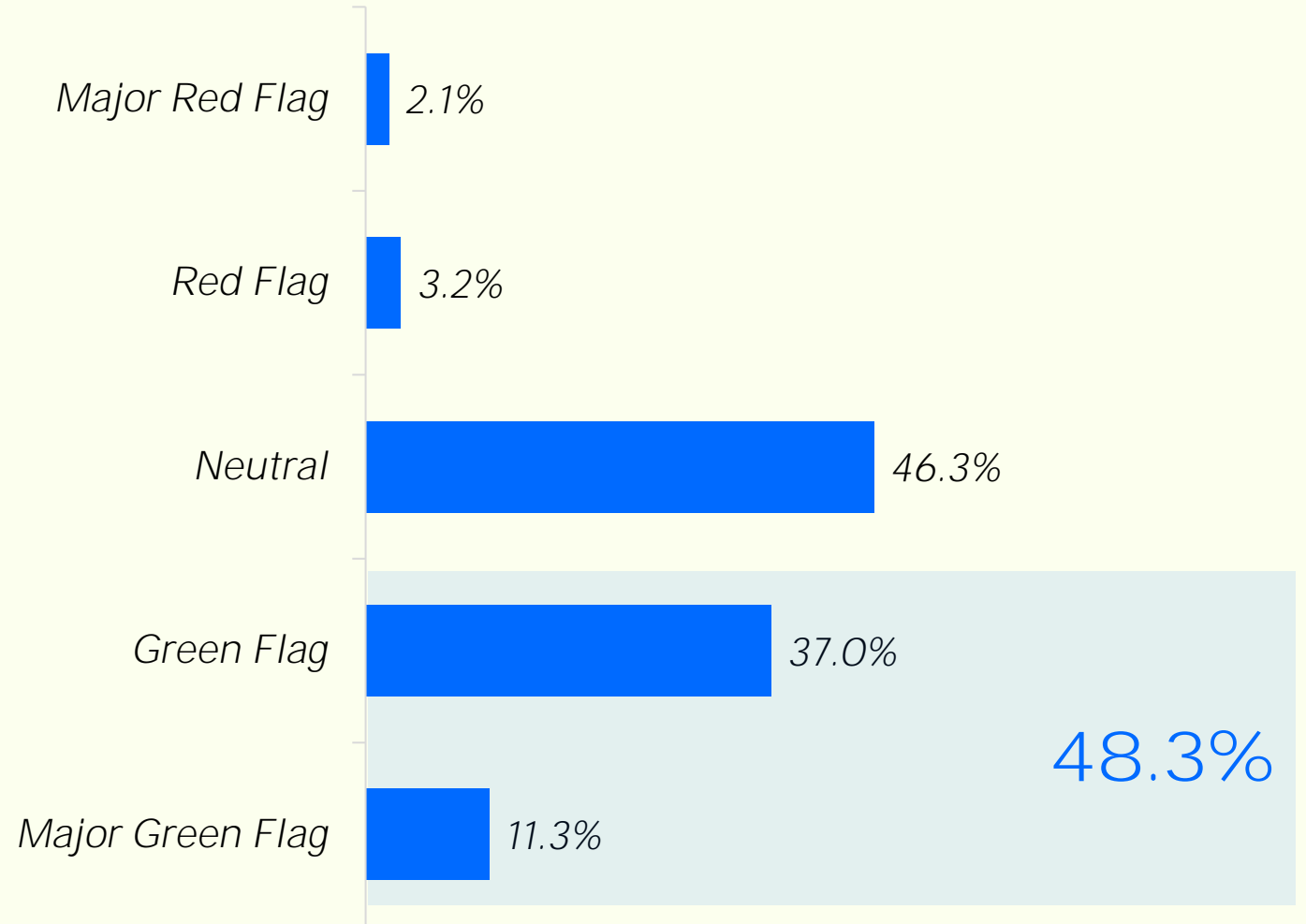
*This place is known for its cutting-edge food scene.*



# Michelin-stars will keep you in the green zone.

## Situation:

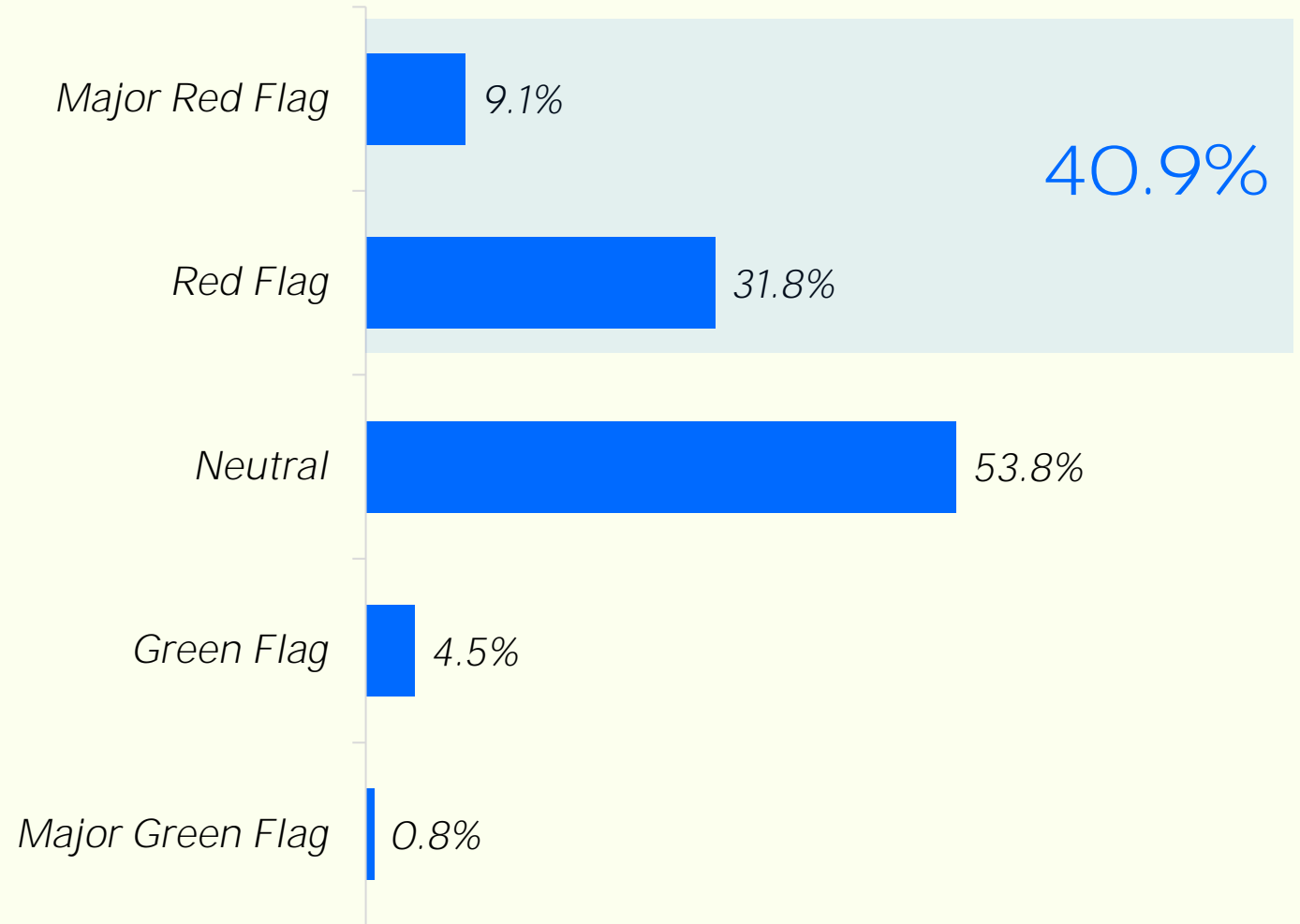
*The destination has a variety of Michelin-starred restaurants.*



# Travelers want to like your signature cuisines.

## Situation:

*The signature cuisine of the destination is not to my liking.*







Food still reigns as one of the most desired overall destination attributes.

Many travelers will respond to you having Michelin-starred restaurants, and even more to your cutting-edge food scene.

Travelers want signature cuisine that fit their tastes.

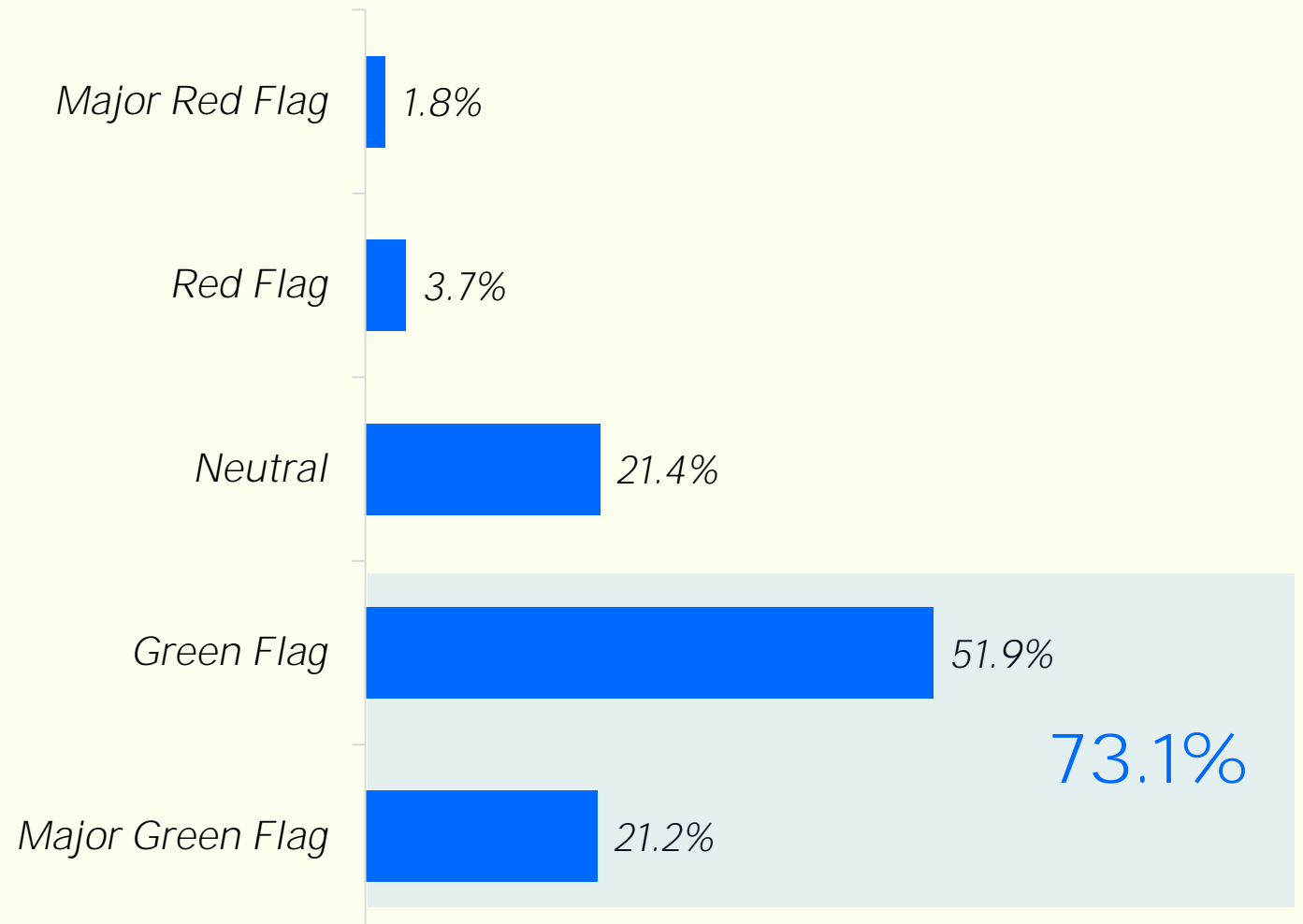
# HIDDEN GEMS



# Green Flags Galore—Travelers Are Into Hidden Gems

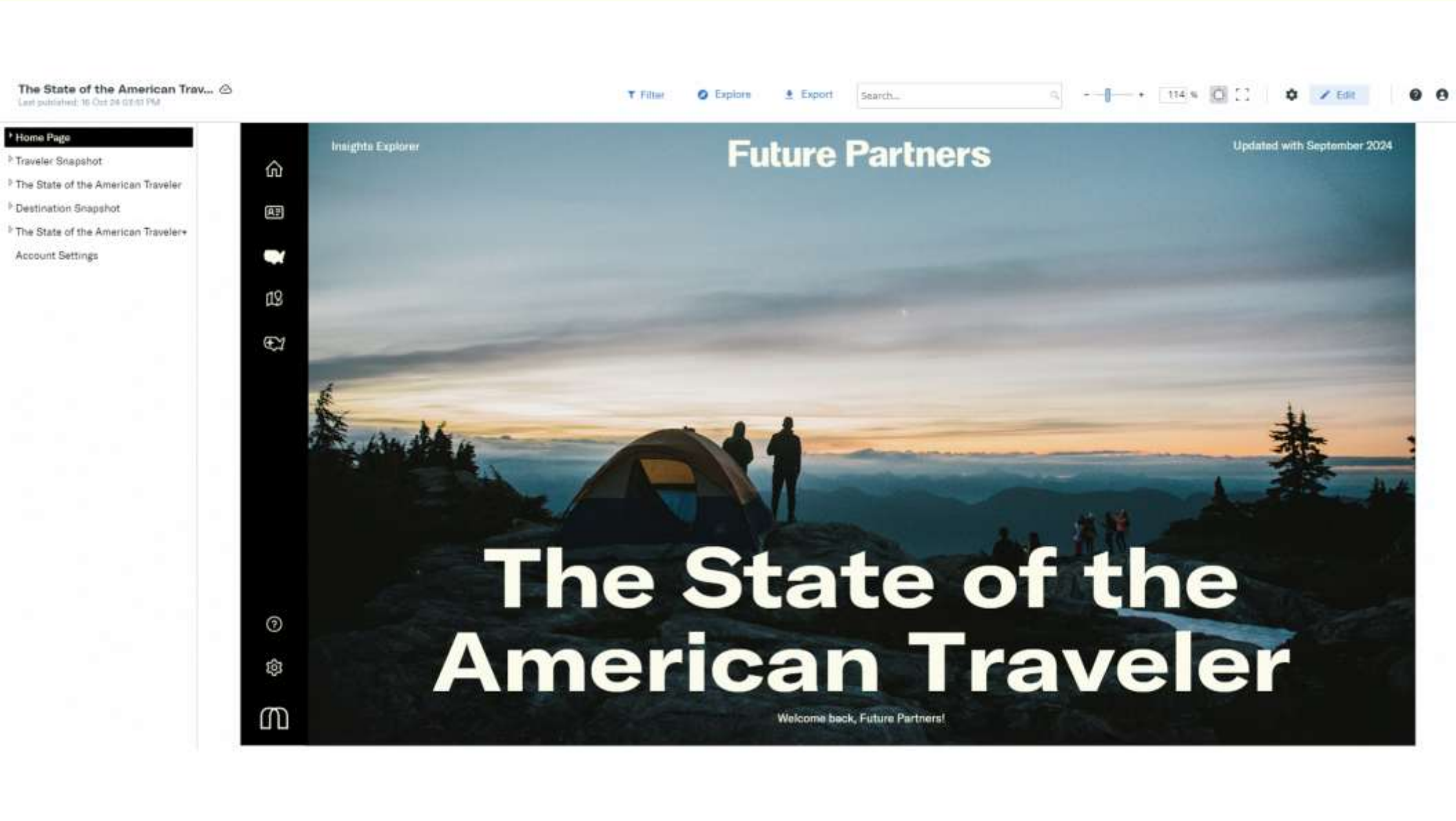
## Situation:

*This destination is described as a hidden gem.*





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# Let's keep the conversation going



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