

2025 TRAVEL PLANS

American Travel Sentiment Study

WAVE 95: OUTLOOK ON SUSTAINABLE TRAVEL

APRIL 17, 2025

Longwoods
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American Travel Sentiment Wave 95 Highlights

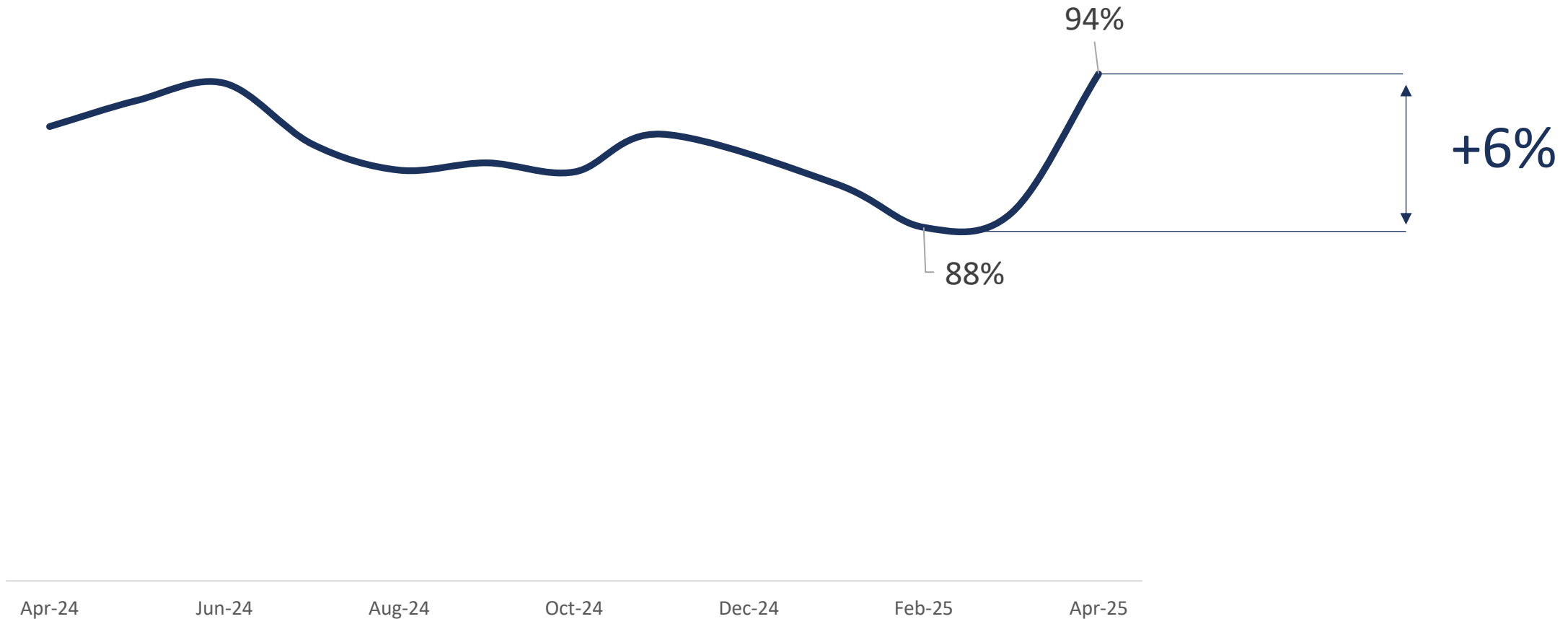
Key Findings:

- **REAL ID Awareness vs. Action**
8 in 10 American travelers are aware of the May 7th REAL ID deadline, yet only 51% currently have one.
- **Sustainable Travel Matters—To a Point**
53% of travelers say sustainable travel is somewhat to very important to them, but follow-through is lagging.
- **The Sustainability Gap Is Growing**
Despite valuing sustainability, fewer travelers are acting on it—down 5 points in those who left destinations unchanged, and 8 points in those who minimized their environmental impact compared to May 2023.
- **Community Support Drives Travel Decisions**
60% of travelers say supporting local businesses and community projects is important when choosing where to travel.
- **Local Impacts of Tourism Are Mixed**
1 in 3 travelers are noticing increased cost of living and traffic in their communities. However, 25% believe tourism brings positive changes, such as new businesses and improved quality of life.



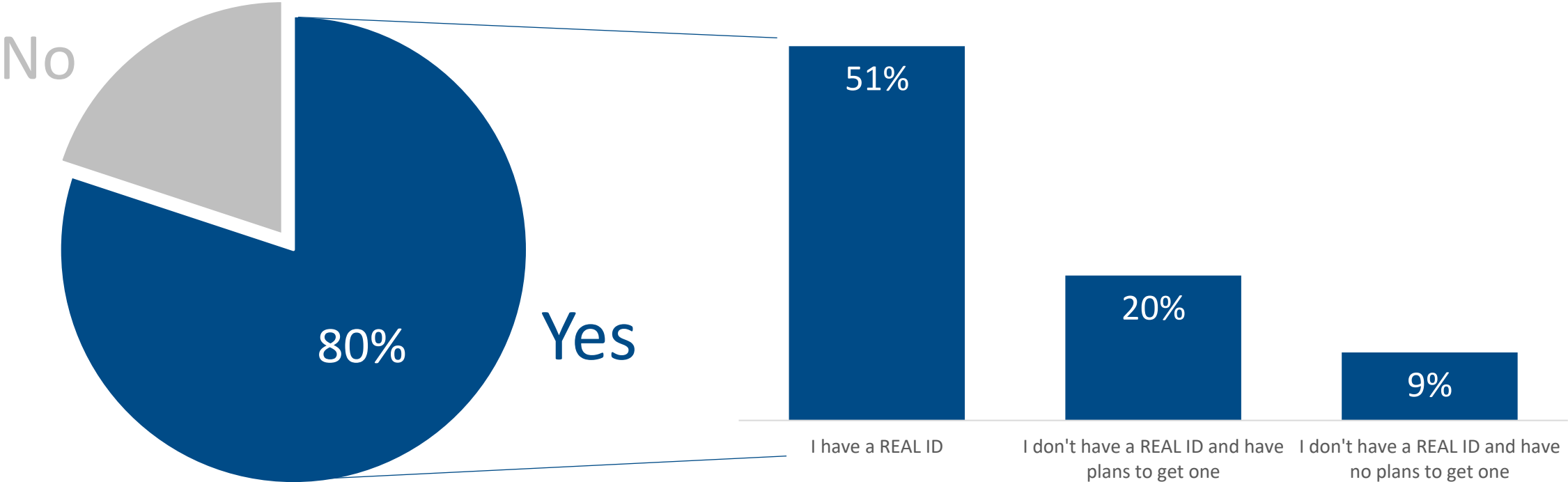
94% of Americans Have Travel Plans – a +6% Increase From Feb'25

Americans who have travel plans within the next 6 months



8 in 10 Travelers Are Aware of the REAL ID Deadline; Only Half Actually Have One

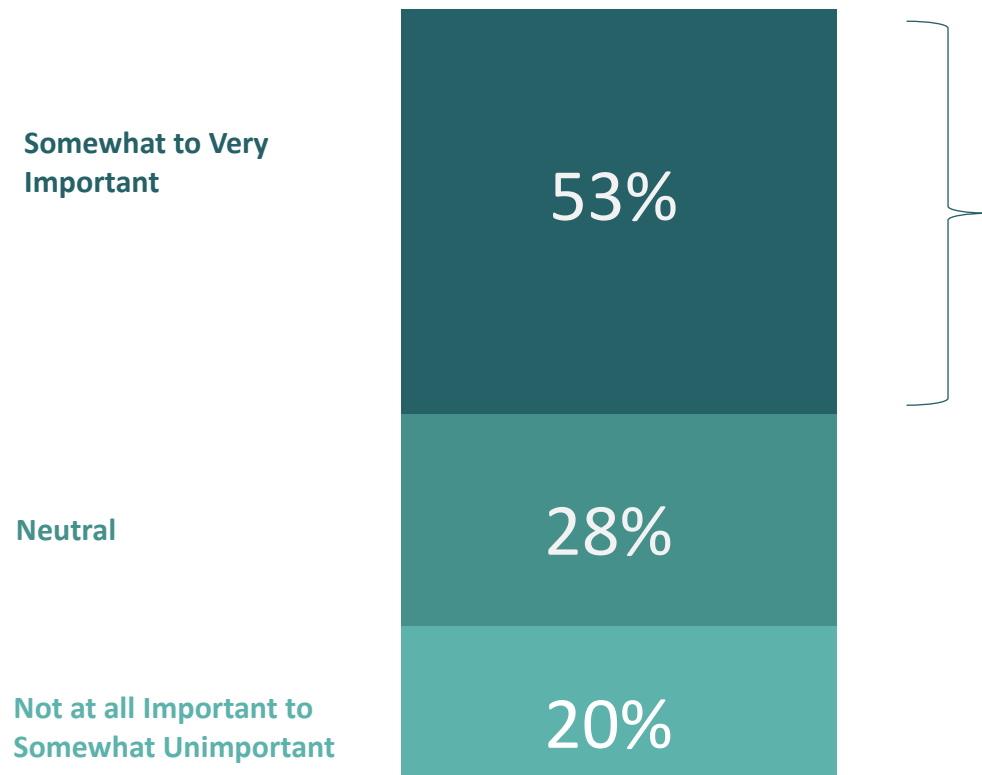
Are you aware of the May 7th deadline to get a REAL ID for domestic air travel?



Source: Longwoods International ATS Wave 95
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Sustainability Matters to Over Half of Travelers

While traveling, how important is it for you to do so sustainably (e.g. eating at local restaurants, recycling, avoid single use plastics)?

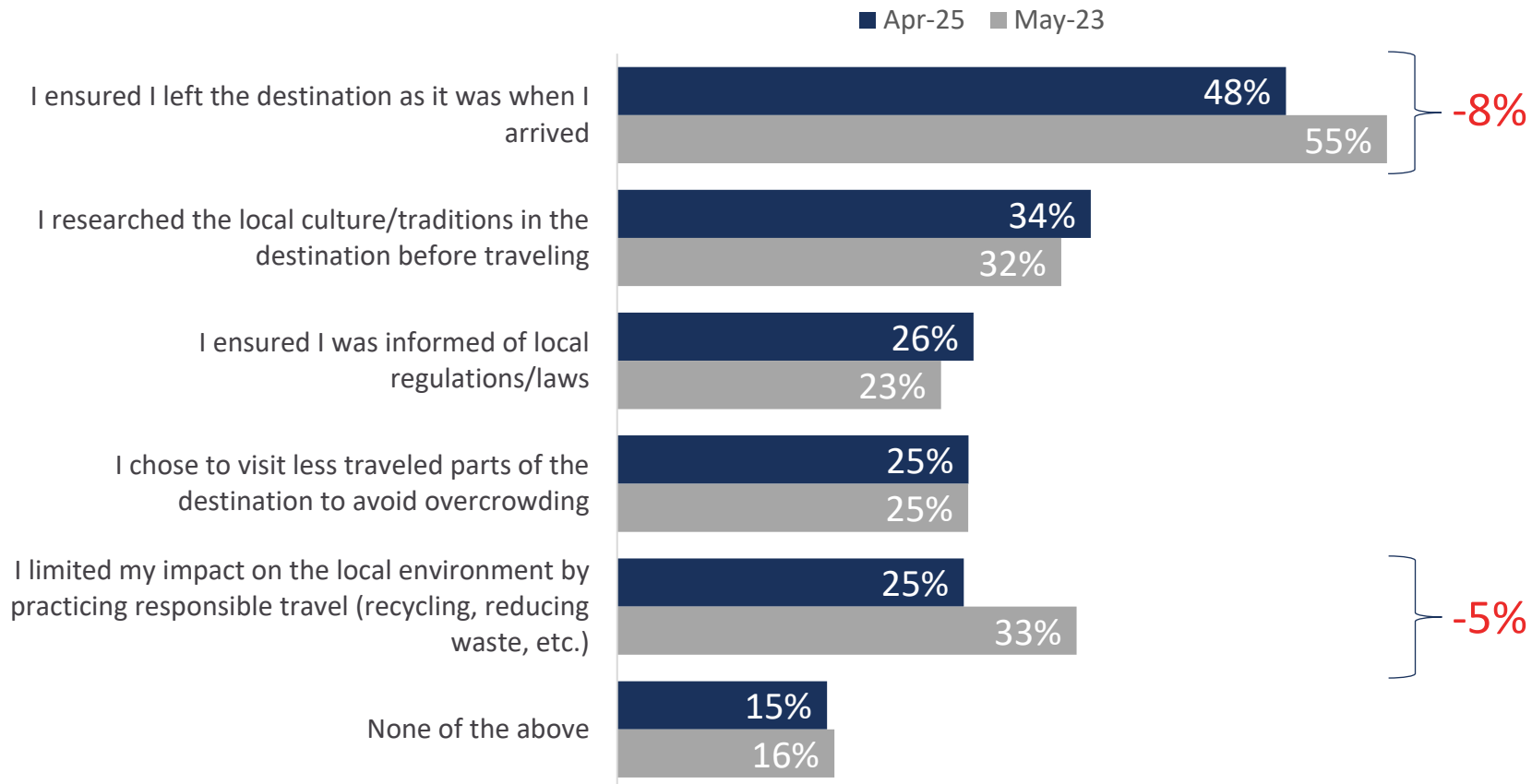


A majority of travelers (53%) say that traveling sustainably is **Somewhat to Very Important** for them to do.

Note: Percentages may add up to more than 100% due to rounding.

Travelers Value Sustainability, But Actions Tell a Different Story

Thinking about your travel behavior on your most recent trip, did you do any of the following?



While a majority of travelers say that traveling sustainably is important to them, their travel behavior does not reflect the sentiment when we compare to their previous behavior.

Compared to May of 2023 there was a **5-point drop** in people who said they left the destination as it was when they arrived, and an **8-point drop** in those who said they limited their impact on the local environment.

Supporting Locals: A Top Priority for Sustainable Travelers

How important are the following efforts to your decision of where to travel in the future?

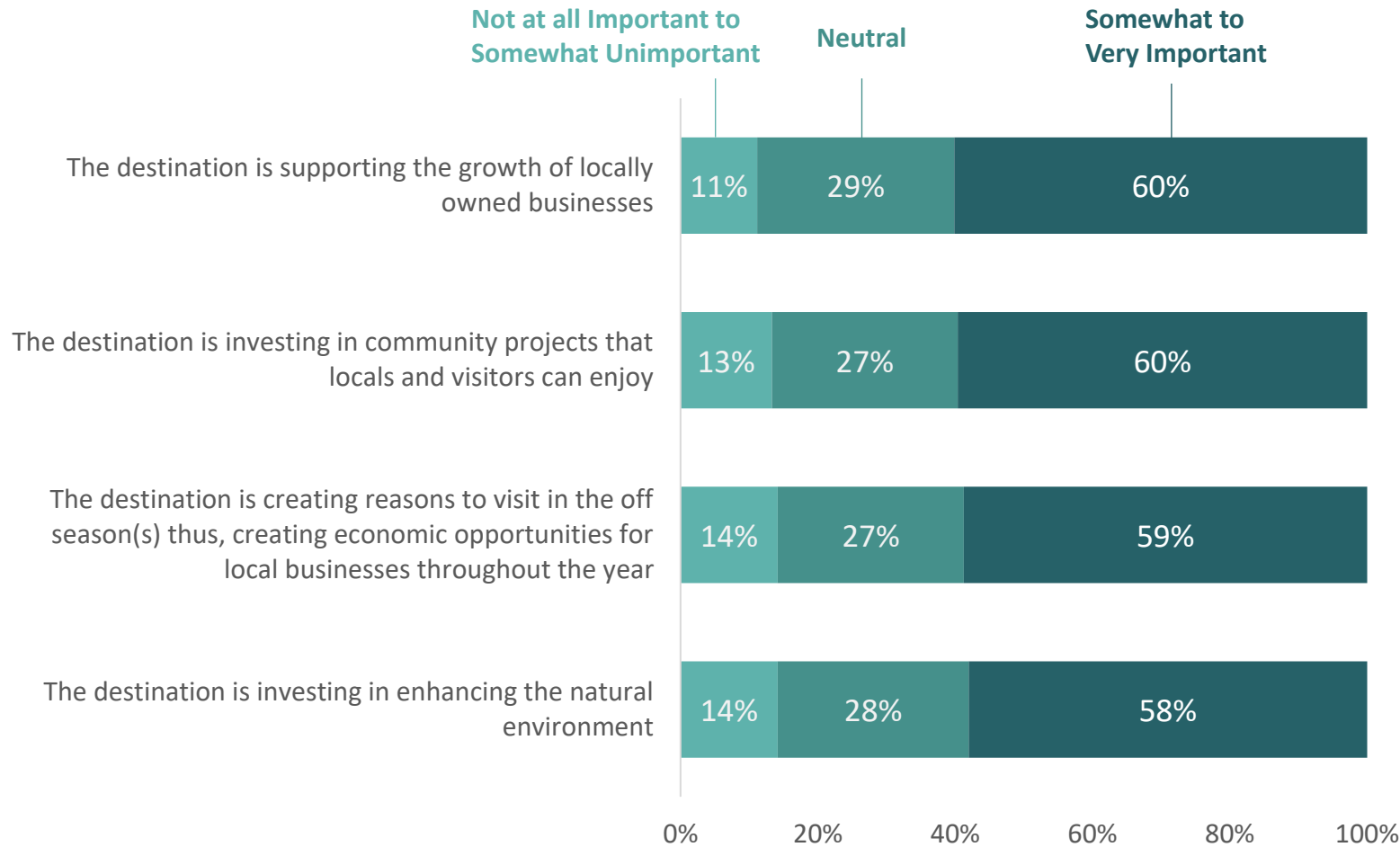
Not at all Important to Somewhat Unimportant Neutral Somewhat to Very Important



Destinations who **support the growth of local businesses and invest in community projects for both local and visitors** are at the top of mind for travelers when choosing where to travel in the future, with **60%** saying these efforts are **somewhat to very important** when making decisions on where to travel in the future.

Supporting Locals: A Top Priority for Sustainable Travelers (Cont'd)

How important are the following efforts to your decision of where to travel in the future?

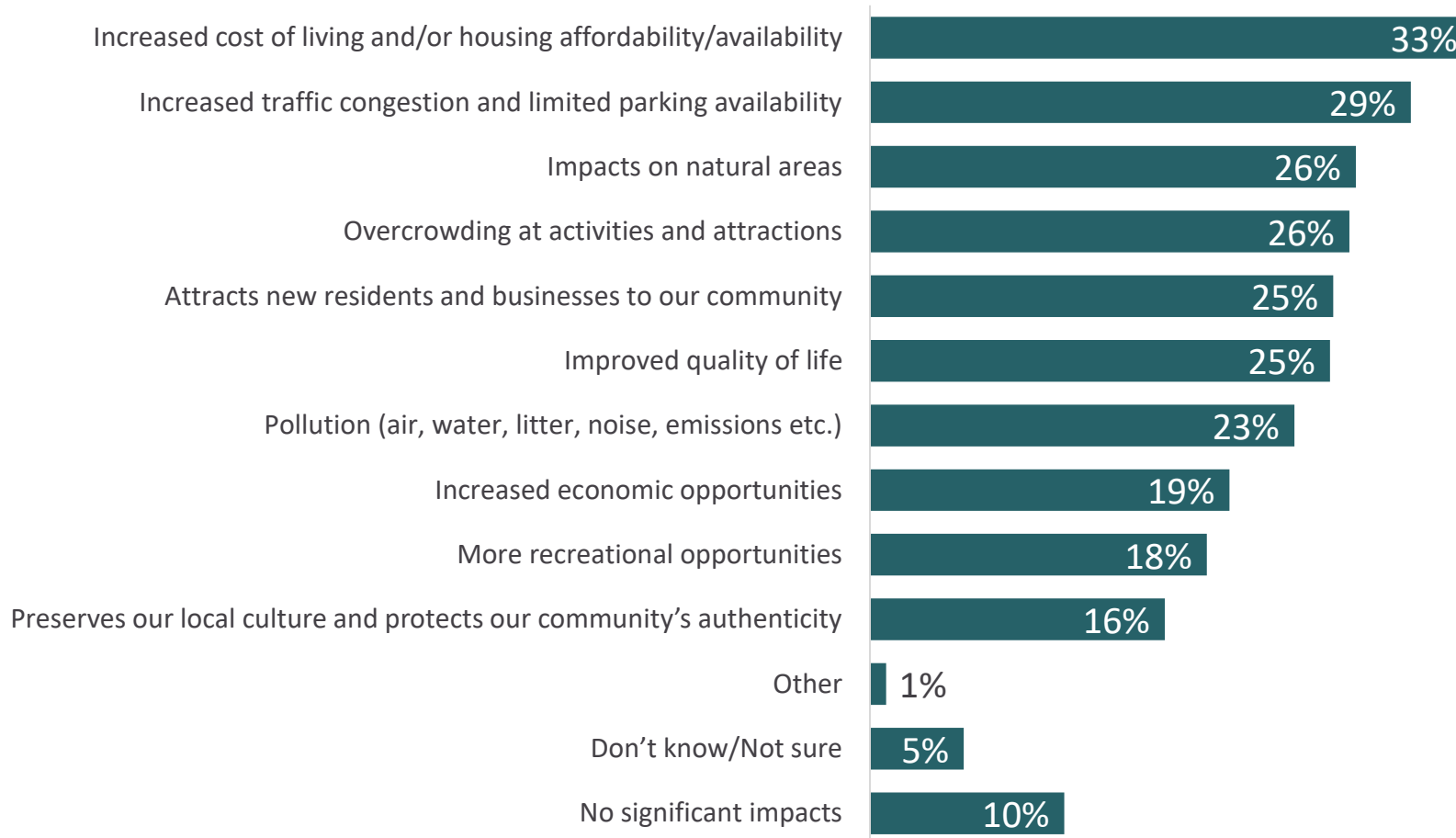


Over 50% of travelers also say efforts to enhance the natural environment, invest in community programs for tourism, and engage with and help minority owned businesses are important to them when making travel decisions.

Source: Longwoods International ATS Wave 95
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Travelers Are Seeing a Mix of Tourism Impacts in Their Communities

Thinking about tourism impacts in your community, which of the following effects have you noticed in your community?



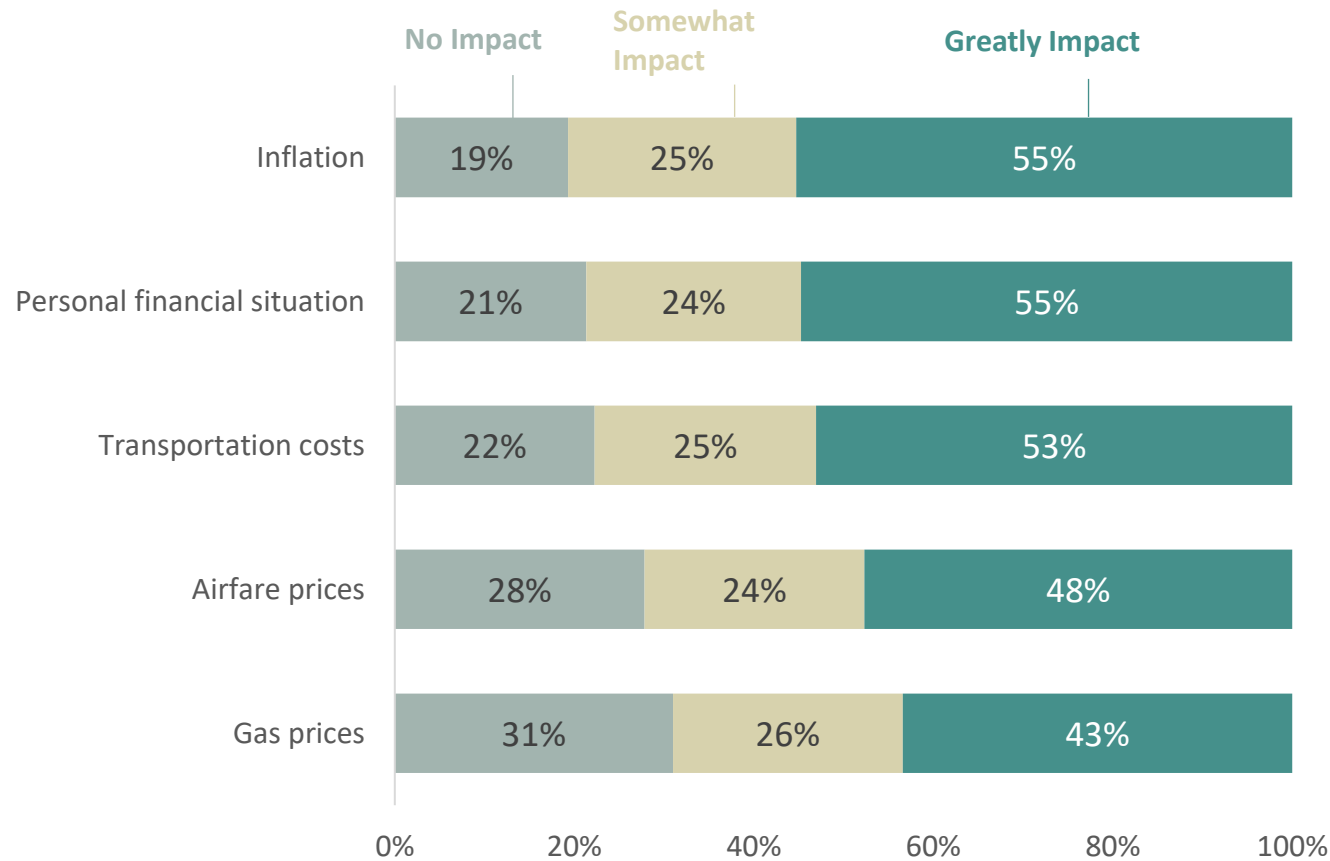
A third of travelers are seeing an **increased cost of living/housing affordability (33%)** and **traffic congestion (29%)** in their own communities.

Although, **a quarter of travelers** say that tourism attracts new residents and businesses and improve their quality of life.

Only 10% of travelers say that they **see no significant tourism impacts** in their own communities.

Inflation is a Rising Concern Among Travelers

Concerns Impacting Your Travel Decisions in the Next Six Months



The data reveals more respondents are **greatly impacted (55%)** by concerns about inflation impacting travel than those that report a lesser impact.

This brings inflation back as a number one concern for travelers compared to the prior wave, where personal financial concerns was held as a paramount concern.

While inflation has risen in rank this wave, there were no significant changes across all variables from March of 2025.

American Travel Sentiment Methodology

The American Travel Sentiment Study is the most comprehensive and longest-running survey of its kind, offering valuable insights into the factors influencing American travel behaviors.

Key Details:

- Survey Date: April 1, 2025
- Sample Size: 1,000 U.S. adults (18+)
- Margin of Error: $\pm 3\%$
- Representative of U.S. population demographics (age, gender, region)

Travelers are only respondents that have taken a trip in the last 3 years and intend to take a trip in the next 2 years.

Conducted with support from Miles Partnership, this study remains a vital tool for understanding the dynamic landscape of American travel.





WHO WE ARE

Established in 1978 as a market research consultancy

Headquartered in Columbus, OH and Toronto, ON

Focused in tourism since 1985

Working with over 175 Destinations and Brands





Additional Resources

Longwoods International Research

<https://longwoods-intl.com/category/american-travel-sentiment/>

Miles Partnership Research and Insights

www.MilesPartnership.com/How-We-Think

A person with long blonde hair tied back, wearing a teal long-sleeved shirt, stands on a rocky ledge overlooking a deep canyon. The canyon walls are dark brown and layered, with a vibrant turquoise river winding through the bottom. The scene is captured from a high angle, looking down at the person and across the canyon.

Thank You!

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