US Travel Recovery Tracker

File created on: 8/12/2026 10:08:50 PM

National Travel Indicators

June 2026

U.S. TRAVEL ASSOCIATION

Compare to Prior Year or 2019
Previous Year

Travel Spending*
(Tourism Economics)

$122.1B

↗ +6.2%
June vs. Previous Year

↗ +4.1%
YTD vs. Previous Year

Air Passengers
(TSA)

↙ -1.3%
June vs. Previous Year

↗ +0.3%
YTD vs. Previous Year

Overseas Arrivals
(NTTO)

↙ -1.8%
June vs. Previous Year

↙ -4.3%
YTD vs. Previous Year

Hotel Demand
(STR)

↗ +2.1%
June vs. Previous Year

↗ +1.8%
YTD vs. Previous Year

Short-term Rental Demand
(AIRDNA)

↗ +2.3%
June vs. Previous Year

↗ +1.3%
YTD vs. Previous Year

Insights

Air passenger volume growth fell further in June (-1.3% year-over-year), following a 0.7% decline in May.

The decline in overseas arrivals moderated to 1.8% in June, from 6.5% in May.

Hotel room demand and short-term rental demand increased in June (+2.1% and +2.3%, respectively), both faster than the month prior.

In June, visitor spending grew 6.2% year-over-year, fueled by stronger summer travel demand and high room rates in World Cup host cities.

Travel Indicators

% change relative to same month vs. Previous Year

Indicators	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Travel Spending (Tourism Economics)	0.2%	0.2%	-0.7%	0.0%	-1.8%	-0.1%	1.0%	3.4%	5.0%	4.5%	3.8%	6.2%
Air Passengers (TSA)	1.2%	1.0%	0.7%	3.6%	-0.2%	0.0%	0.1%	2.7%	1.7%	0.1%	-0.7%	-1.3%
Overseas Arrivals (NTTO)	-3.1%	-2.9%	-7.7%	-3.1%	-3.5%	-1.3%	-4.2%	0.8%	3.6%	-14.1%	-6.5%	-1.8%
Hotel Demand (STR)	-0.4%	-0.7%	-1.3%	-1.7%	-2.2%	-0.2%	0.4%	2.8%	2.5%	2.0%	0.9%	2.1%
Top 25 Group Hotel Demand** (STR)	-9.3%	-10.8%	-8.7%	-5.1%	-3.3%	-8.4%	-6.9%	-1.5%	0.9%	-1.4%	-3.4%	3.1%
Short-term Rental Demand (AIRDNA)	5.4%	4.7%	0.5%	2.4%	1.1%	1.0%	1.4%	-0.1%	1.1%	1.7%	1.1%	2.3%
National Park Visits (National Park Service)	-1.3%	1.1%	-2.4%	-5.6%	-4.2%	-0.6%	-1.0%	-1.8%	-1.2%	-5.2%	-6.5%	-7.8%

-14.1% 6.2%

*Travel spending estimates are subject to revision as annual data becomes available
**STR group hotel demand at upper-tier hotels (luxury and upper upscale classes)

SYMPHONY TOURISM ECONOMICS

United States Travel Indicators

June 2026

U.S. TRAVEL ASSOCIATION

Select a State
United States

Reporting Period
Month

Indicator
Lodging Demand

JOBS

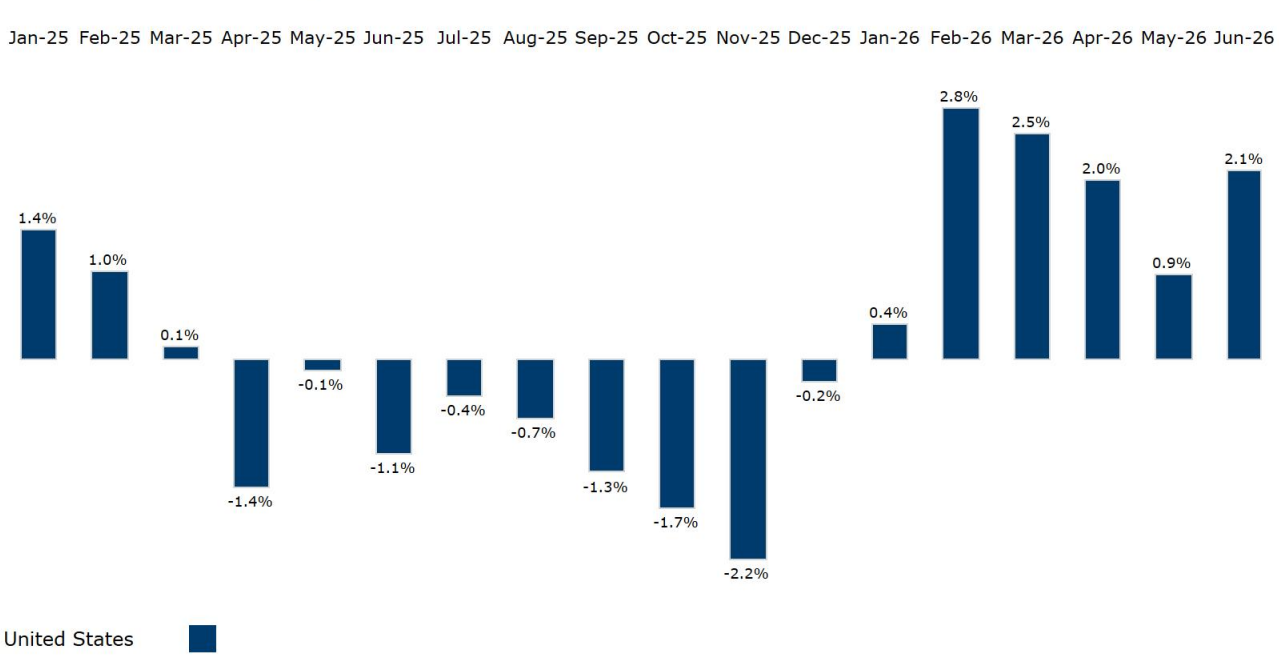
↗ +0.7%
June 2026 YOY
L & H Jobs
(BLS)

↙ -1.3%
June 2026 YOY
Air Passengers
(Airline Data Inc; TSA)

↗ +2.1%
June 2026 YOY
Hotel Demand
(STR)

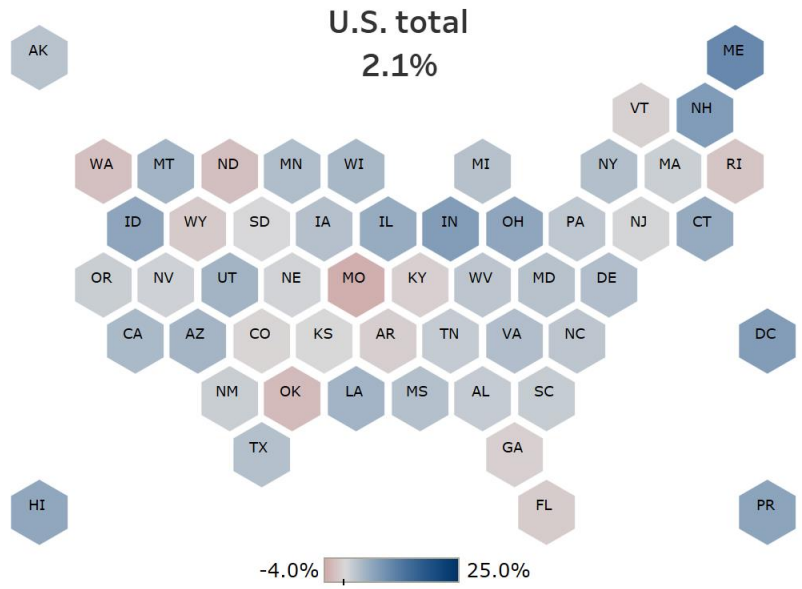
Lodging Demand by Month

United States vs U.S., % Change YOY



Lodging Demand by State

June 2026 (Month), % change YOY



SYMPHONY TOURISM ECONOMICS

Employment Trends

June 2026

U.S. TRAVEL ASSOCIATION

Insights

The labor market gained 49,000 private jobs in June, after increasing 97,000 in May.

Leisure & Hospitality (L&H) employment fell by 61,000 jobs in June, following a 40,000 increase the month prior. The volatility is due to seasonal noise.

L&H jobs still increased 0.7% year-over-year to 17.0 million jobs in June – 114,000 jobs above their level in the same month of last year.

L&H wage growth weakened slightly to 3.9% in June, but remained above overall private sector wage growth of 3.5% in the same period.

Job Changes by Industry

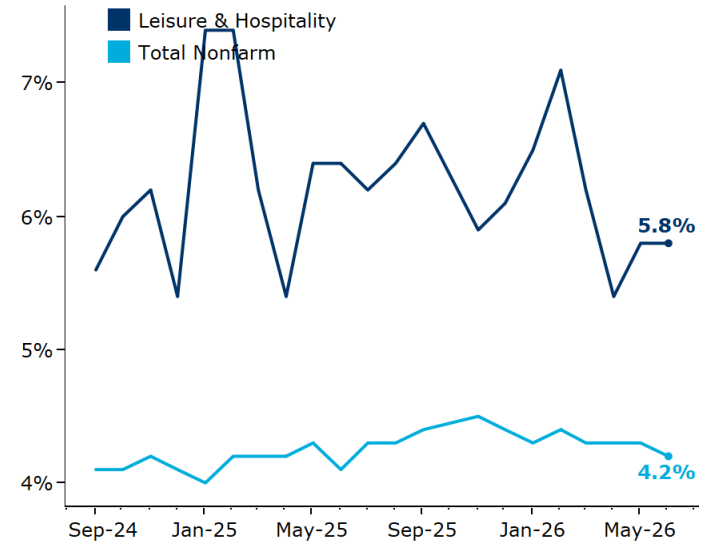
United States, June 2026

Compare to Previous Year

	Jobs vs. previous month	Jobs vs. Previous Year	% change vs. Previous Year
Total Private	49K	721K	0.5%
Leisure and Hospitality	-61K	114K	0.7%
Construction	11K	64K	0.8%
Education and Health Services	69K	647K	2.4%
Financial Activities	0K	-100K	-1.1%
Government	8K	-215K	-0.9%
Information	-9K	-89K	-3.1%
Manufacturing	3K	-38K	-0.3%
Mining and Logging	-4K	-9K	-1.5%
Other Services	8K	56K	0.9%
Professional and Business Services	36K	88K	0.4%
Retail Trade	-8K	34K	0.2%
Transportation and Warehousing	2K	-54K	-0.7%
Utilities	-1K	5K	0.8%
Wholesale Trade	2K	1K	0.0%

Unemployment Rate

Unemployment rate among those previously employed in the industry, seasonally adjusted



Leisure & Hospitality Sub-Sectors and Air Transportation

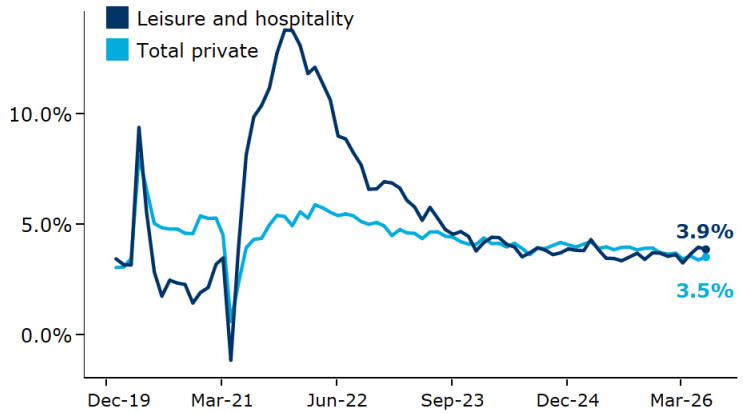
% change relative to same month vs. previous year

Industry	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Total Private	0.4%	0.3%	0.4%	0.4%	0.5%	0.5%
Leisure & Hospitality	0.8%	0.8%	0.9%	0.8%	1.0%	0.7%
Accommodation	-0.7%	-0.9%	-0.4%	-1.1%	-0.3%	-0.8%
Arts, Entertainment & Recreation	0.6%	1.0%	0.7%	0.7%	0.6%	0.0%
Food Services & Drinking Places	1.1%	1.1%	1.2%	1.1%	1.3%	1.0%
Air transportation	0.8%	1.0%	1.5%	0.5%	-1.0%	-0.3%

Source: BLS

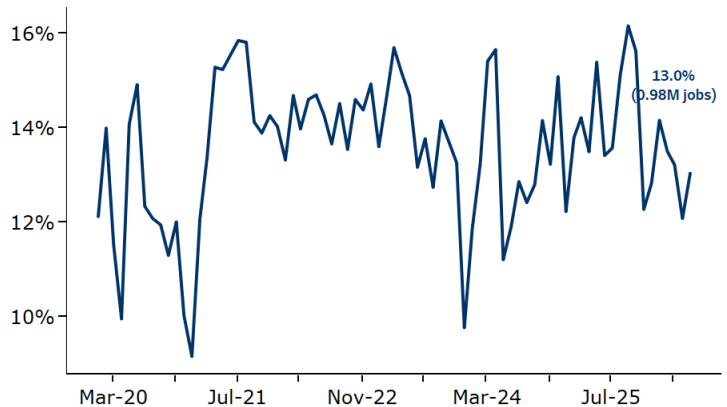
Average Hourly Earnings

% change relative to same month vs. previous year



L& H Job Openings

% share of Total Nonfarm job openings



SYMPHONY TOURISM ECONOMICS

Workforce

June 2026

U.S. TRAVEL ASSOCIATION

Insights

Private job openings remained relatively unchanged at 6.8 million in May, resulting in a private job openings rate of 4.8%. Meanwhile, L&H job openings increased to 941,000 in May, yielding an L&H openings rate of 5.2%.

The private quits rate held steady at 2.1% in May while the L&H quits rate increased from 3.7% in April to 4.0% in May.

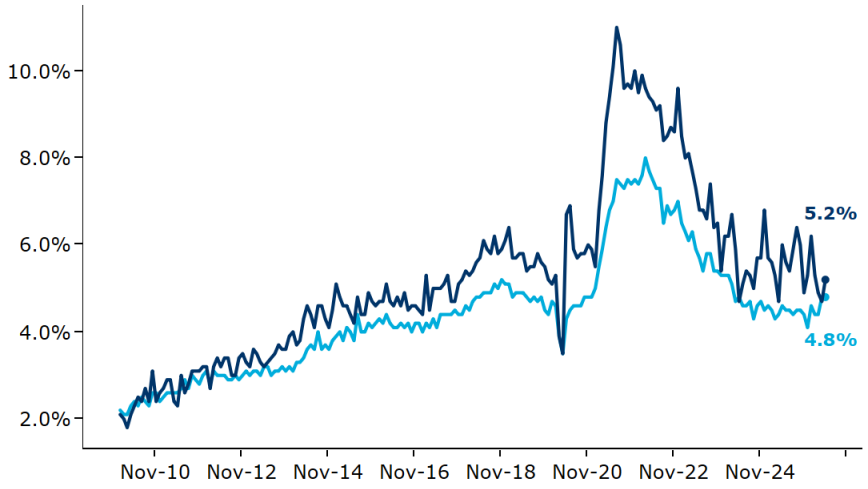
In June, the share of firms raising employee compensation fell to 28%, while the share of firms reporting being unable to fill job openings grew to 32%.

Sector Filter
Multiple values

- Leisure and hospitality
- Total Private

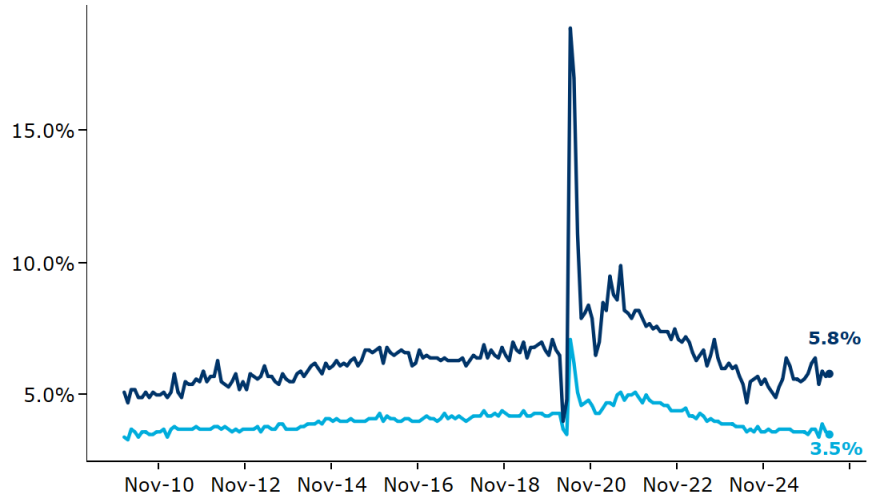
Job Openings Rate

Job openings as a percent of total jobs available



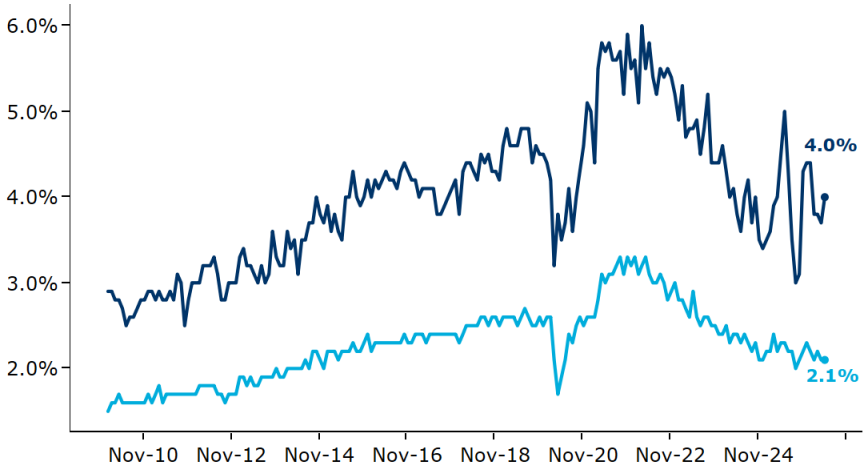
Job Hirings Rate

Job hirings as a percent of total jobs available

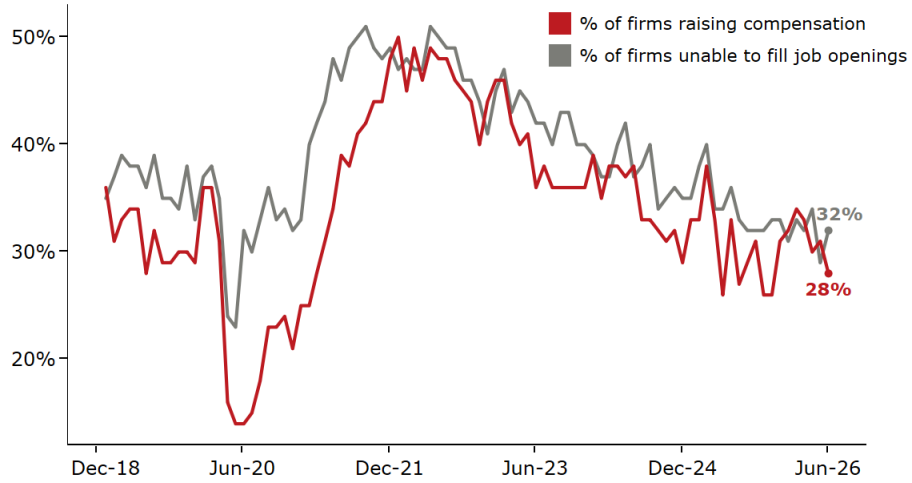


Job Quit Rate

Job quits as a percent of total employment



NFIB Small Business Jobs Report



SYMPHONY TOURISM ECONOMICS

U.S. Economic Conditions

June 2026

U.S. TRAVEL ASSOCIATION

Compare to
Previous Year

Insights

The Consumer Price Index (CPI) fell 0.4% month-over-month in June, driven by a sharp drop in gasoline prices, pulling year-over-year inflation down from 4.2% to 3.5%. The bigger takeaway from the June report was the benign reading of core prices (excluding volatile food and energy). The Federal Reserve is worried about a broadening out of inflationary pressures across goods and services, and that wasn't evident in the June CPI details.

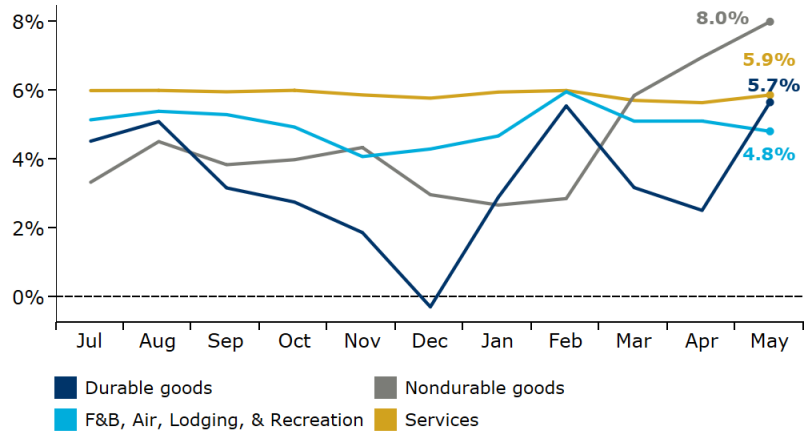
For consumers, the fall in gas prices will ease the pinch on wallets. Thanks to the slower rate of inflation, growth in real (inflation-adjusted) average hourly earnings is set to turn positive for the first time since February.

However, risks remain as oil prices have risen following renewed hostilities between the US and Iran. Additionally, there are indications that the AI-driven shortage of memory chips is starting to push up the costs of smartphones, computers, and related products.

Overall, the economic outlook remains solid. Should Middle East tensions continue to subside, falling oil prices will reduce the drag on real incomes over the second half of the year, helping maintain consumer spending growth, supported by a job market that's broadly in balance. However, core inflation is still expected to remain above the Federal Reserve's 2% target longer than previously projected because AI-related demand will keep electronics inflation elevated. Due to inflation's slow retreat, the Fed is expected to keep rates unchanged for a prolonged period.

Consumer Spending

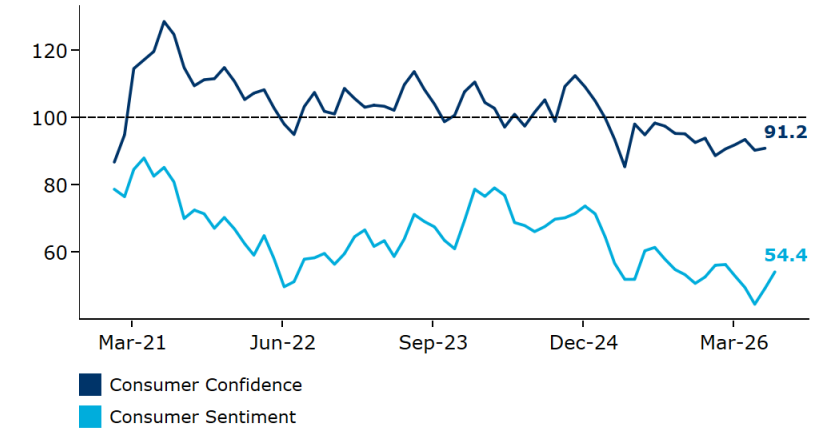
% change relative to same month vs. Previous Year, prior 12-month trend



Source: BEA

Consumer Confidence & Sentiment Index

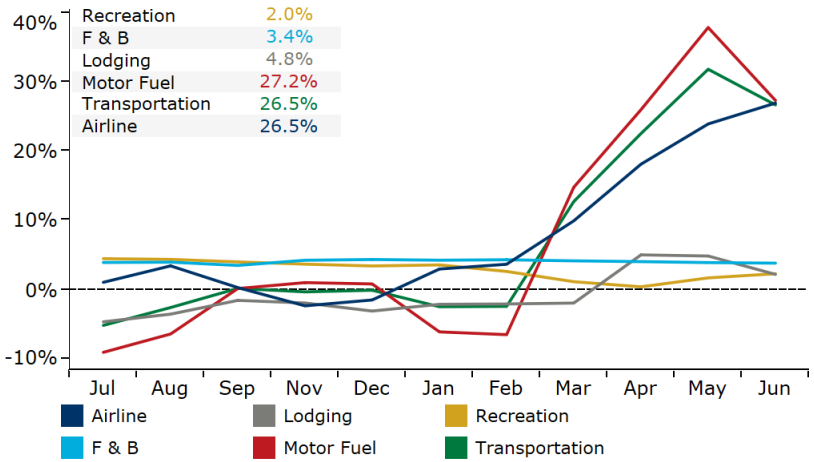
Index, 1985=100, prior 5-years



Source: Conference Board and University of Michigan

Travel Price Index, Major Components

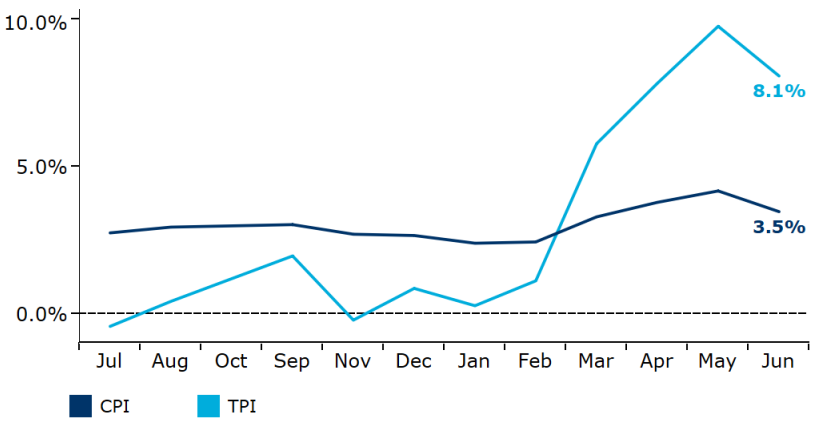
% change relative to same month vs. Previous Year, prior 12-month trend



Source: Tourism Economics

Travel (TPI) and Consumer (CPI) Price Indices

% change relative to same month vs. Previous Year, prior 12-months



Source: BLS (CPI); and Tourism Economics (TPI)

SYMPHONY TOURISM ECONOMICS

Air Travel

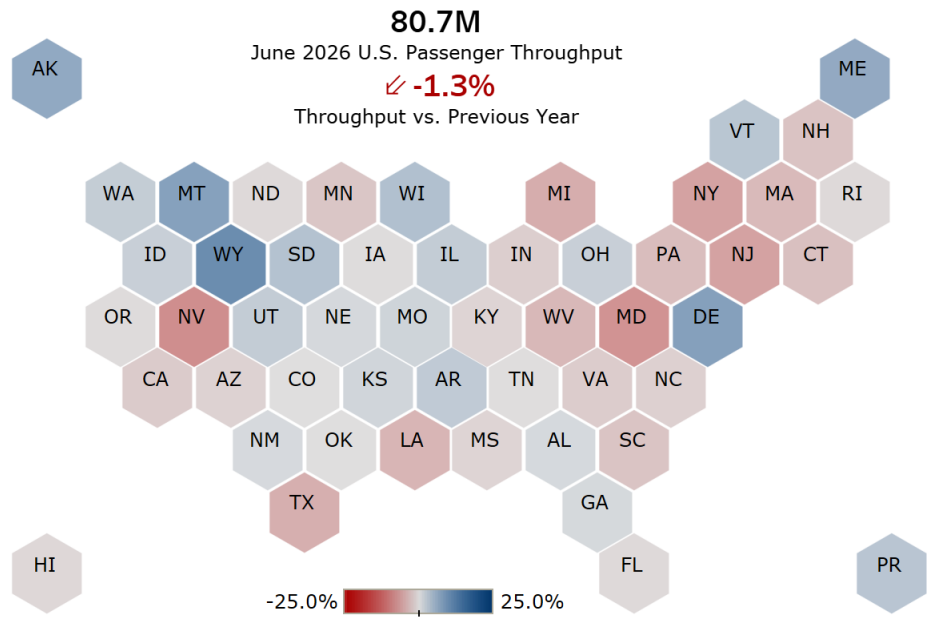
June 2026

U.S. TRAVEL ASSOCIATION

June 2026 Passenger Throughput by State

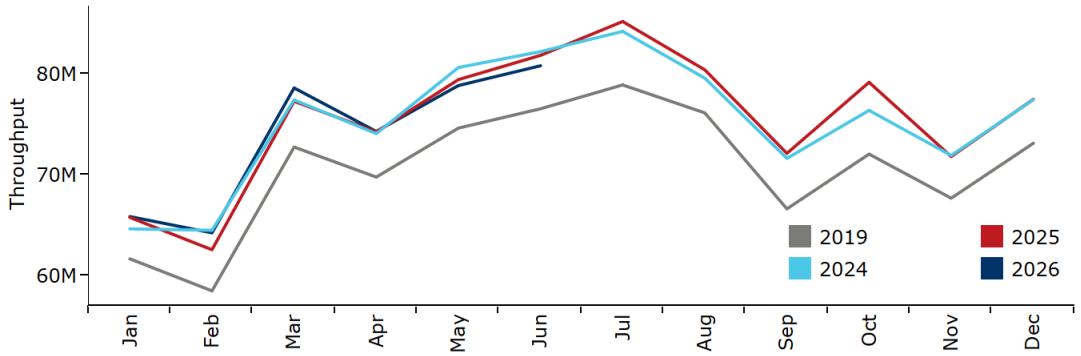
All passengers (domestic + international), % change vs. Previous Year

Compare to
Previous Year



U.S. Monthly Passenger Throughput

All passengers (domestic + international)



Source: TSA

Passenger Throughput Trend Comparison

All passengers (domestic + international), Index (2019=100)

State/Territory Name
Multiple values

	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Arizona	116	114	113	119	122	117	112	128	120	116	117	118	114
California	96	95	93	95	98	94	95	101	96	95	94	94	93
Colorado	106	107	106	108	111	106	106	119	108	109	105	105	106
Georgia	134	137	132	138	140	135	134	151	137	140	147	135	136
Illinois	103	106	104	105	105	103	103	114	104	105	103	104	106
Indiana	116	114	118	118	124	112	113	126	120	113	122	115	113
Kentucky	110	111	107	113	111	103	105	116	114	110	114	110	109
Massachusetts	105	107	104	106	110	104	104	117	103	106	107	104	100
Michigan	109	109	109	108	108	103	104	116	110	102	103	98	102
Minnesota	106	109	103	104	106	102	100	110	103	101	103	101	103
Missouri	104	106	106	107	106	102	102	107	105	102	108	101	105
Montana	148	146	143	155	156	139	131	165	149	147	145	154	162
Nevada	111	111	111	110	113	108	108	121	115	112	107	107	100
New Jersey	95	103	105	104	105	106	107	122	105	109	100	99	88
New York	99	101	96	99	101	102	102	107	101	98	92	87	92
North Carolina	117	118	112	118	119	112	114	128	121	122	116	116	115
Oregon	102	100	99	99	102	98	95	106	99	96	102	100	102
Pennsylvania	105	103	103	105	107	100	101	112	108	106	100	101	101
Puerto Rico	134	139	151	140	133	120	124	152	131	115	135	144	139
South Dakota	127	131	131	130	138	133	127	159	149	145	150	144	132
Texas	114	115	110	114	115	112	111	124	116	112	113	112	107
Virginia	111	115	108	111	110	107	113	122	116	113	108	111	108
Washington	105	106	104	104	105	101	99	115	110	101	103	109	108
United States	107	108	106	108	110	106	106	107	110	108	106	106	106

87 — 165

SYMPHONY TOURISM ECONOMICS

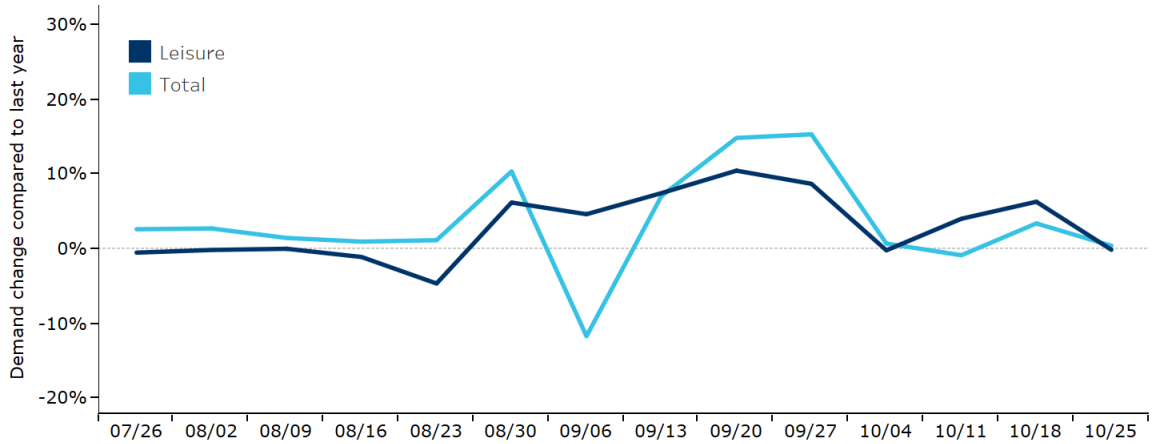
Domestic Leisure Travel

June 2026

U.S. TRAVEL ASSOCIATION

U.S. Hotel Leisure Demand Pace

Leisure hotel booking pace vs same time last year, as of 7/18/2026



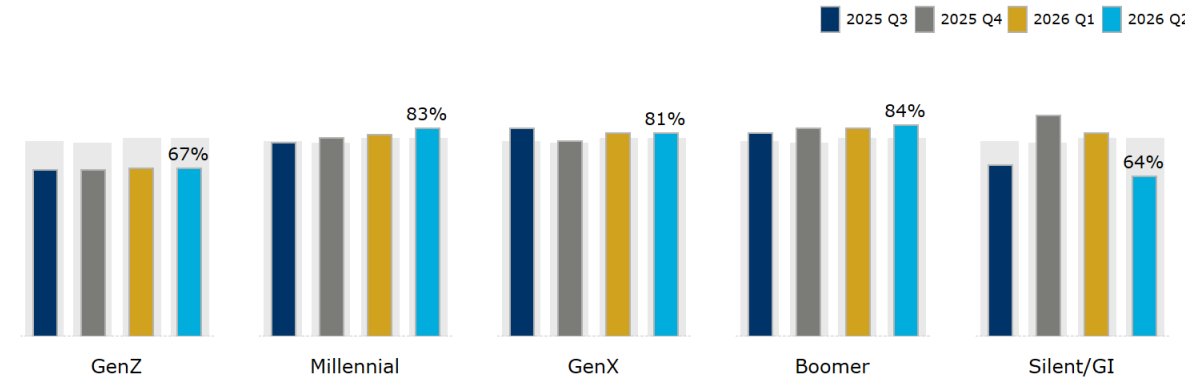
Source: Amadeus

Planning Leisure Travel Within the Next 12 Months

% of American Travelers

Demographic
Generation

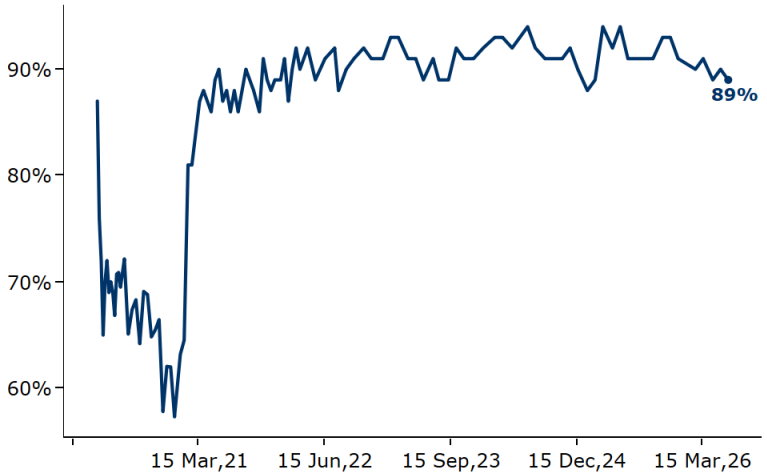
Travel Plans (use slider below to change travel window)
Within the Next 12 Months



Source: MMGY Global's Portrait of American Travelers (released June 2026)

Consumer Travel Sentiment

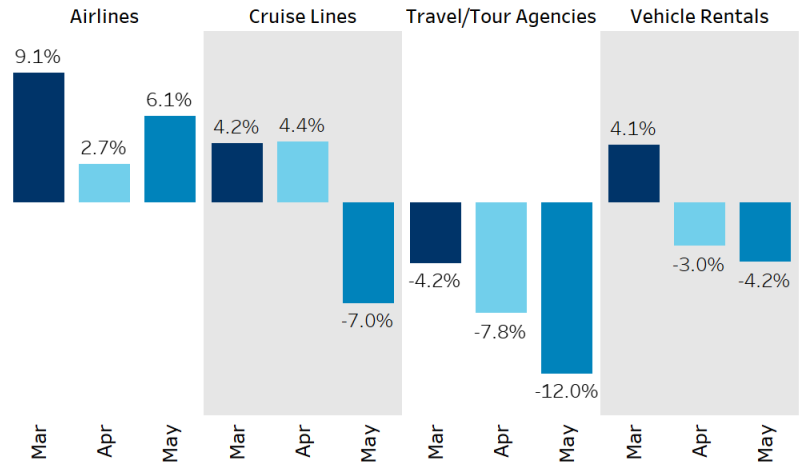
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

US Consumer Credit Card Spend

% change YOY



Source: TransUnion

Consumer Travel Sentiment

Do you feel now is a good or bad time for you to spend money on leisur..

	Good	Neutral	Bad
Apr-25	30.1%	39.9%	30.0%
May-25	31.3%	39.4%	29.4%
Jun-25	37.0%	37.7%	25.2%
Jul-25	36.1%	37.3%	26.6%
Aug-25	34.9%	37.0%	28.2%
Sep-25	34.4%	39.2%	26.4%
Oct-25	34.2%	37.4%	28.5%
Nov-25	35.3%	36.7%	27.8%
Dec-25	32.7%	38.4%	28.8%
Jan-26	34.9%	39.3%	26.0%
Feb-26	35.8%	40.9%	23.4%
Mar-26	34.0%	38.8%	27.2%
Apr-26	34.0%	38.8%	27.2%
May-26	31.6%	38.3%	30.1%
Jun-26	37.7%	36.8%	25.5%

Source: Future Partners

SYMPHONY TOURISM ECONOMICS

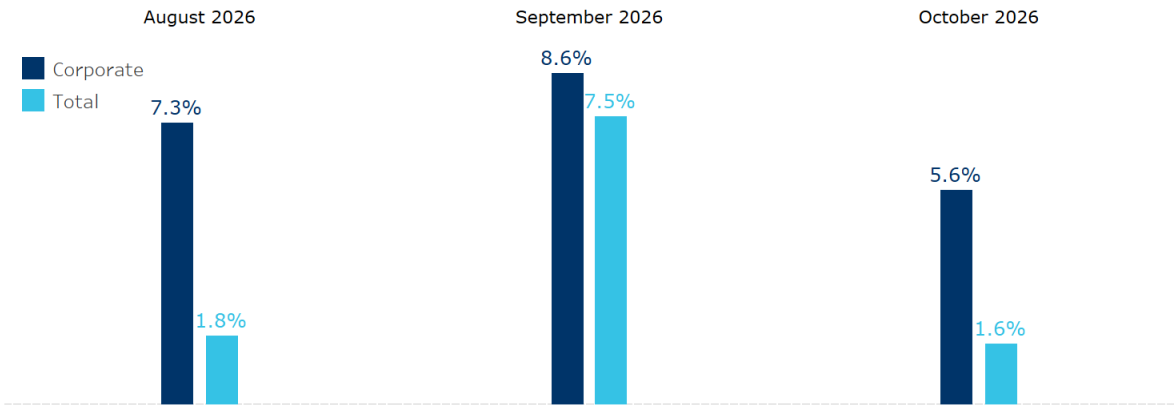
Domestic Business Travel

June 2026

U.S. TRAVEL ASSOCIATION

U.S. Hotel Business Demand Pace

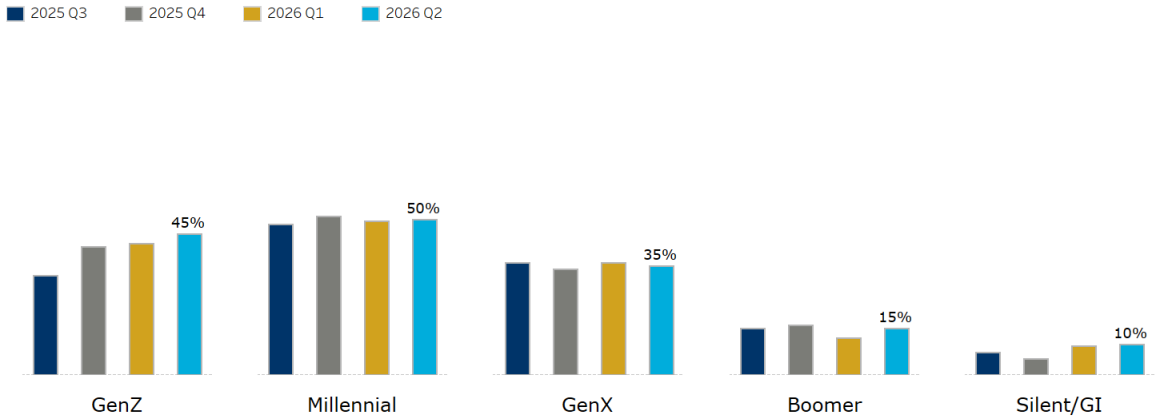
Business hotel booking pace vs same time last year, as of 7/18/2026



Source: Amadeus

Planning Business Travel Within the Next 12 Months

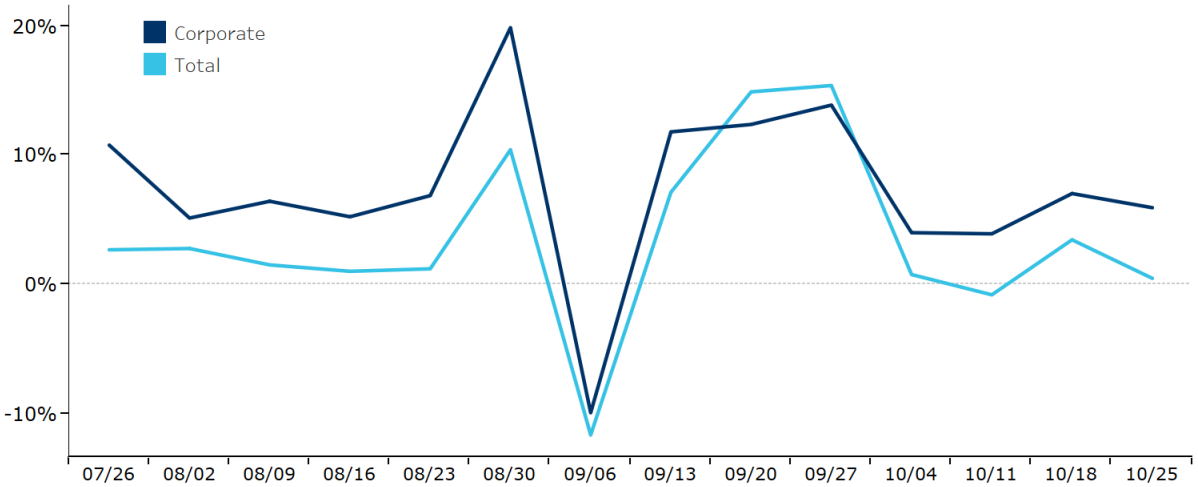
% of American Consumers by Generation



Source: MMGY Global's Portrait of American Travelers (released June 2026)

U.S. Hotel Business Demand Pace

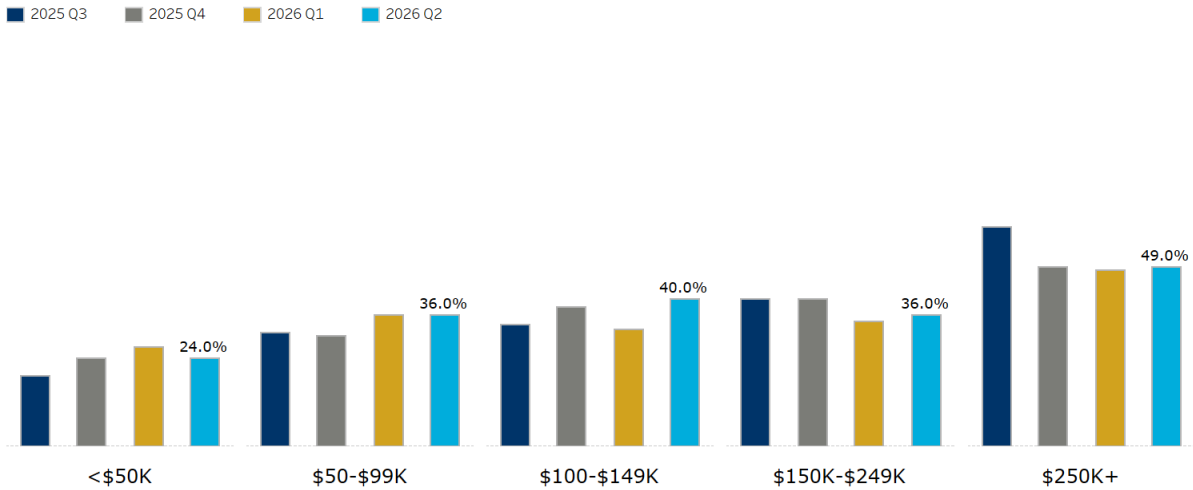
Business hotel booking pace vs same time last year, as of 7/18/2026



Source: Amadeus

Planning Business Travel Within the Next 12 Months

% of American Consumers by Household Income



Source: MMGY Global's Portrait of American Travelers

SYMPHONY TOURISM ECONOMICS

Domestic Group Travel

June 2026

U.S. TRAVEL ASSOCIATION

Insights

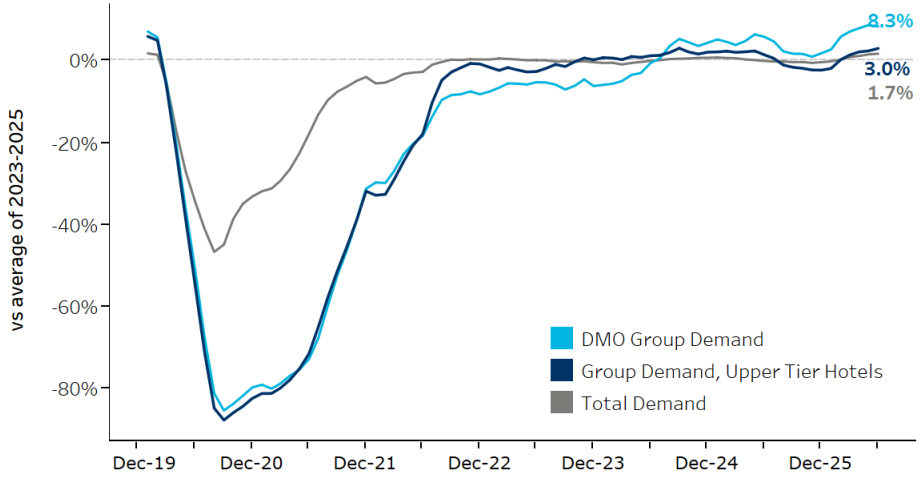
DMO group demand in June was 8.3% above 2023-2025 average levels, closing out a solid quarter for DMO bookings.

DMO/CVB room nights on the books as of July are up 1.4% for Q3 compared to a year ago, but down 1.4% for Q4.

The level of meeting planner optimism increased in June, with 35% more optimistic about the outlook compared to 24% in February.

Total U.S. Hotel Demand vs Group Demand

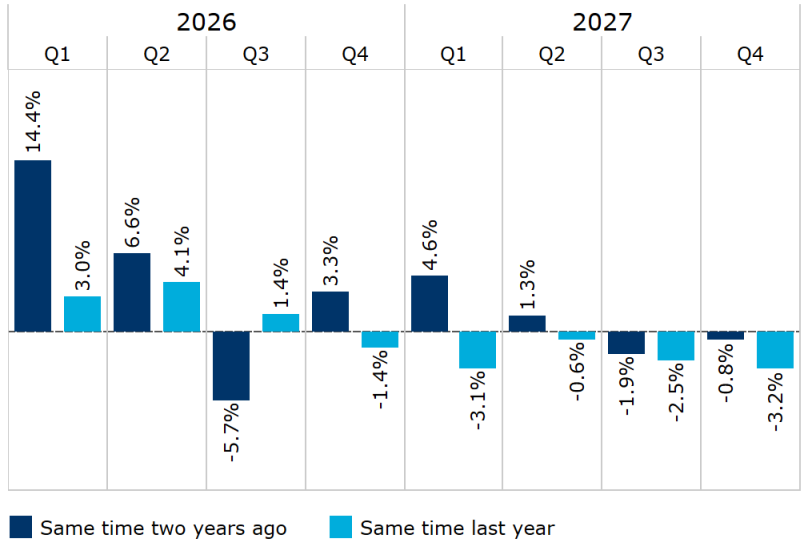
Group demand, % change vs average of 2023-2025, six-month moving average



Source: STR (total demand and top-tier group demand), Simpleview CRM (250+ U.S. DMOs)

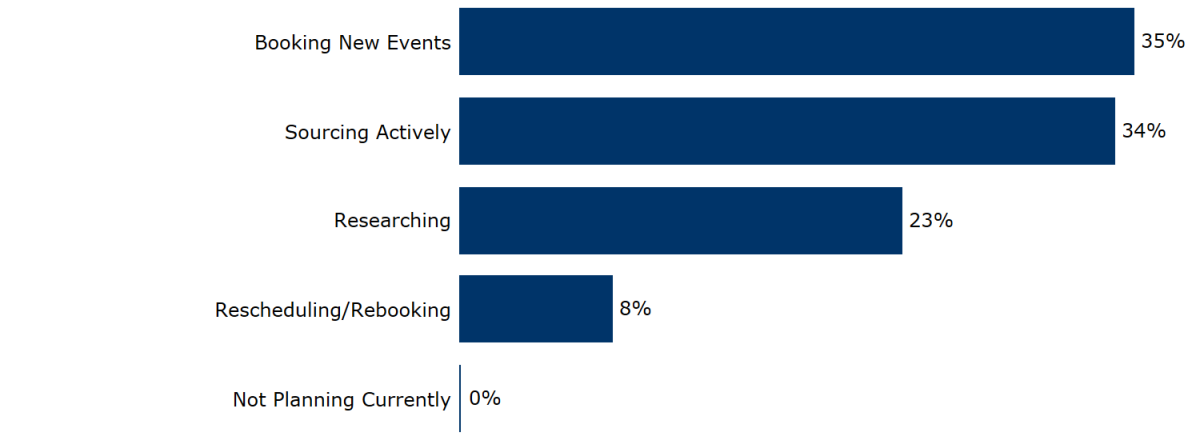
DMO Room Nights on the Books

By event date, vs. previous year (as of July 2, 2026)



Sourcing of Meeting & Event Venues

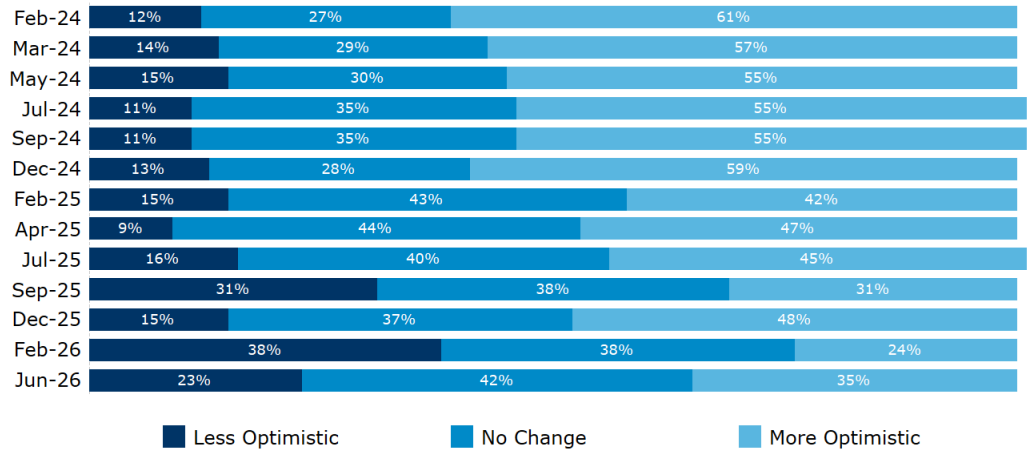
What is your current primary focus as it pertains to your live, in-person events?



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of June 2026

Meeting Planner Outlook

How the outlook for recovery has changed among meeting planners the past six weeks



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of June 2026

SYMPHONY TOURISM ECONOMICS

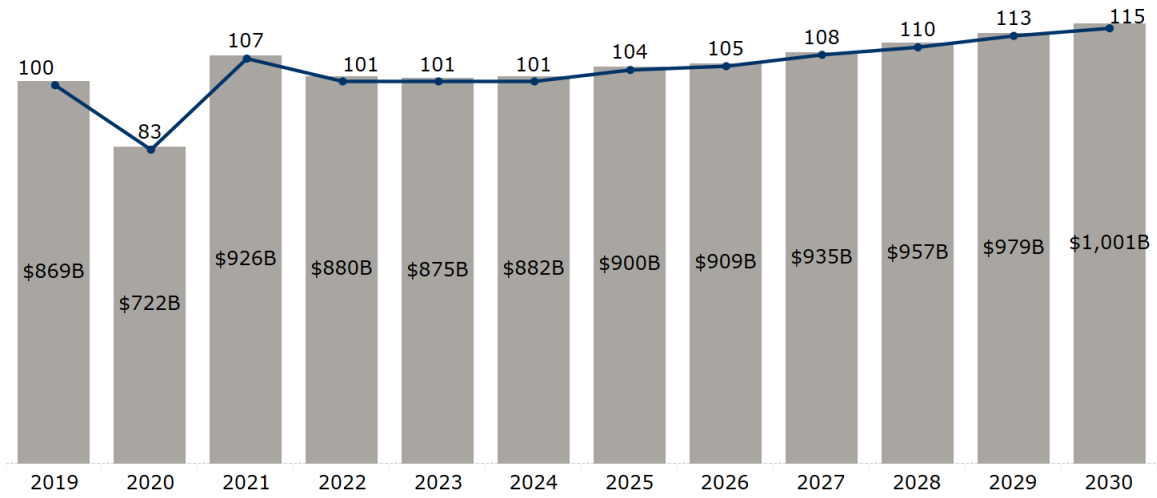
Domestic Travel Forecast

Forecasted in May, 2026

U.S. TRAVEL ASSOCIATION

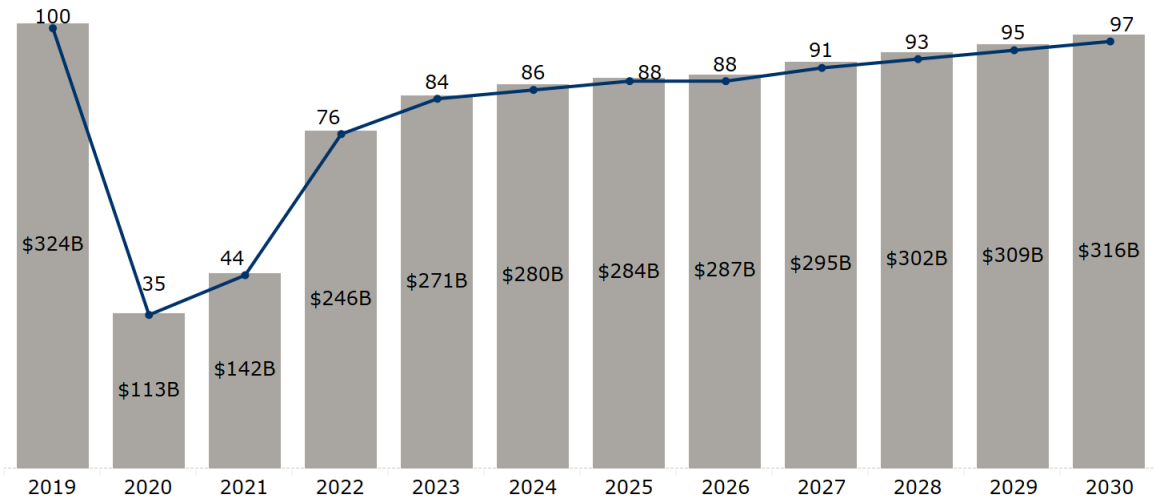
Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



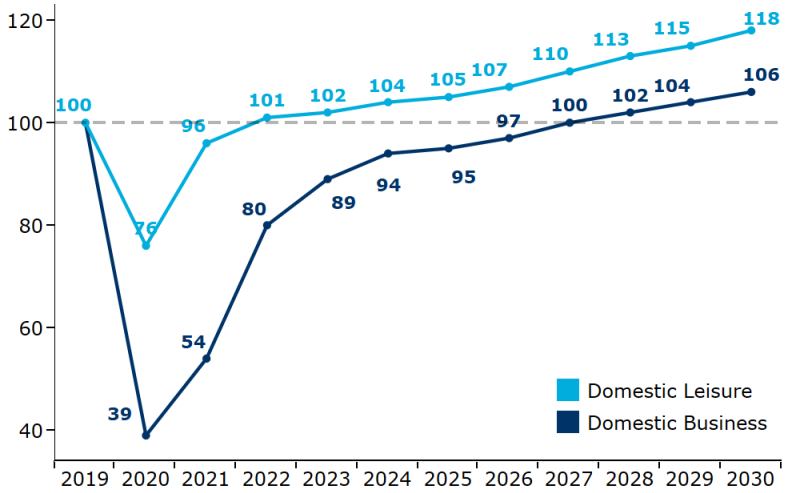
Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



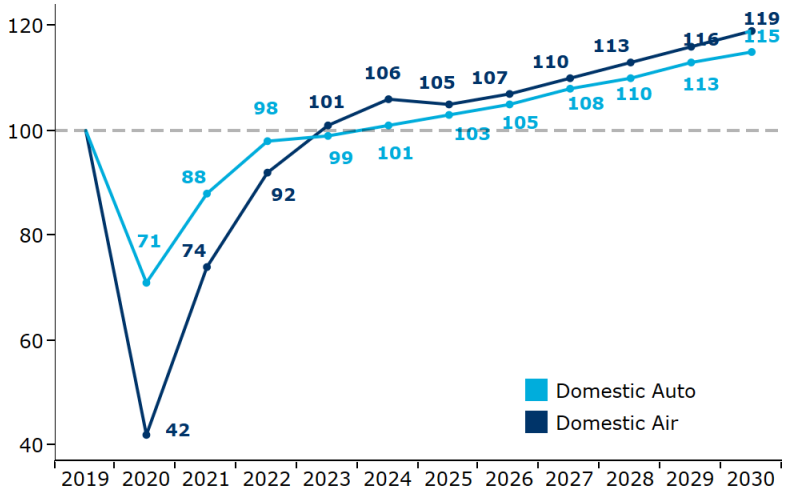
Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



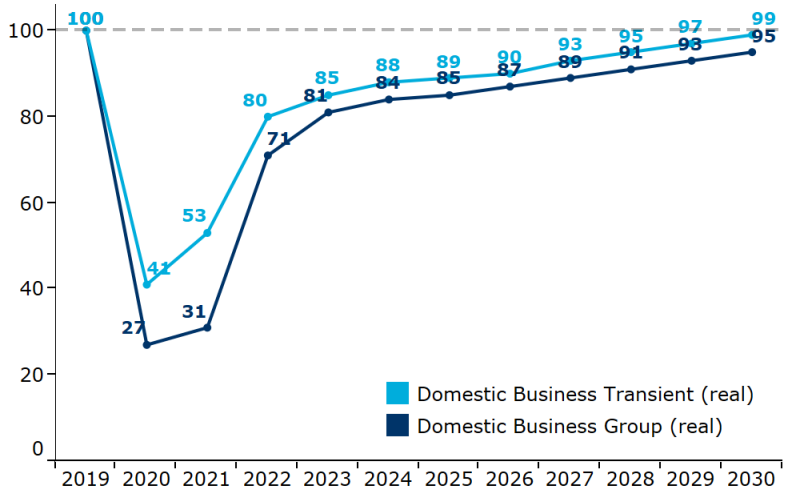
Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



Transient vs. Group Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



Source: Tourism Economics

SYMPHONY TOURISM ECONOMICS

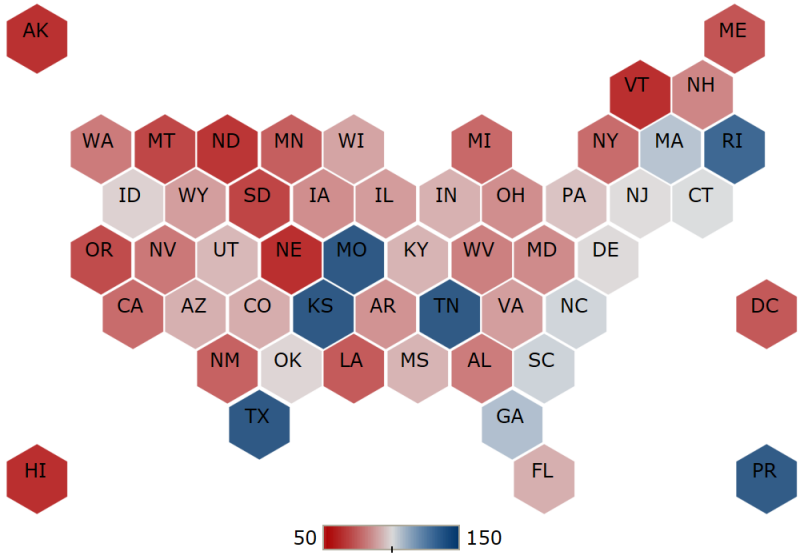
International Inbound Travel

June 2026

U.S. TRAVEL ASSOCIATION

Overseas Arrivals to U.S. by State (+PR)

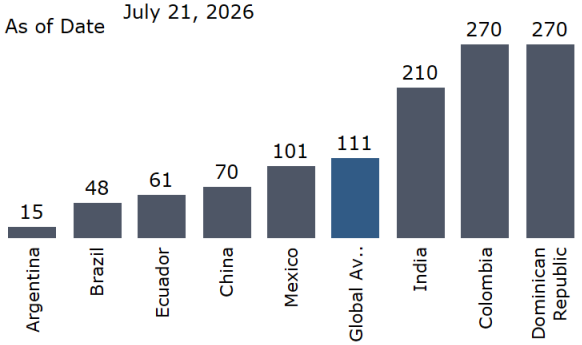
Visitor arrivals for June 2026, Index (2019 = 100), based on first intended address



Next Available Visa Appointment

Avg. Days

As of Date July 21, 2026

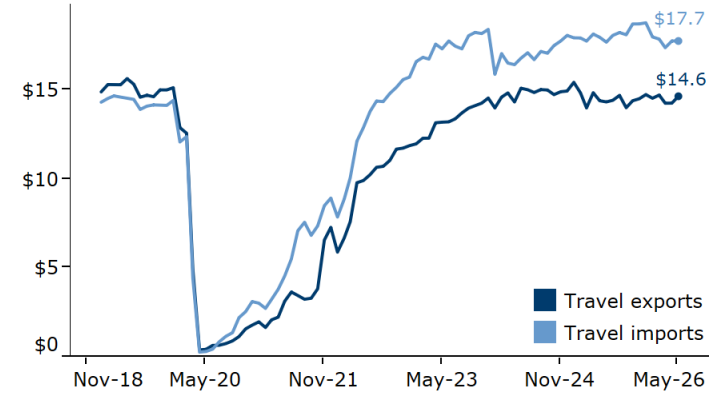


Top-8 inbound markets for tourist visa required countries. Weighted average by 2019 consulate visa issuance. Global Average includes China

Source: Tourism Economics

Nominal US Export and Imports

in billions

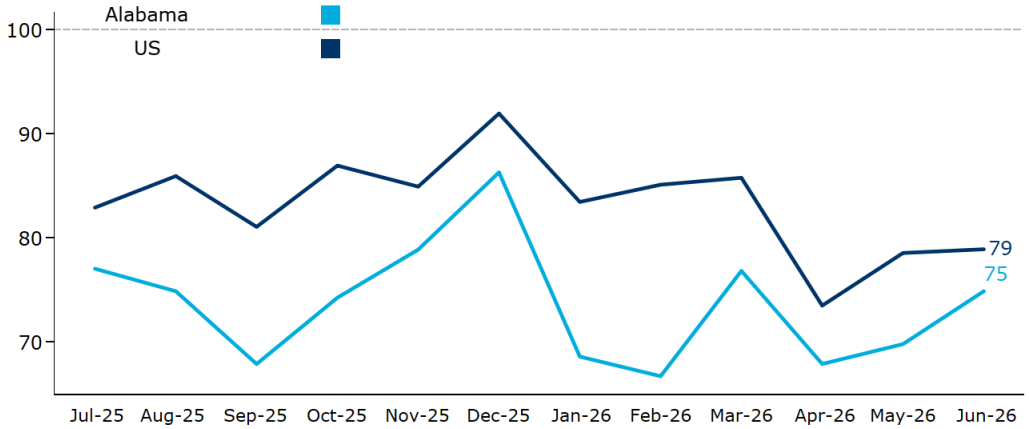


Source: NTTO

Overseas Arrivals to U.S. Total & Alabama

Visitor arrivals to U.S. Total & Alabama, (Index 2019 = 100),based on first intended address

State Alabama



International Arrivals to U.S. Total

Visitor arrivals to U.S. Total, (Index 2019 = 100), based on first intended address

Destination U.S. Total

Origin Multiple values

	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Total Overseas	80	83	86	81	87	85	92	83	85	86	74	79	79
Brazil	101	89	85	85	95	93	103	88	95	87	91	93	90
Canada	73	66	65	67	77	80	78	82	83	76	73	79	
Canada (air)	90	92	89	86	91	89	90	94	93	92	91	95	
France	77	81	85	79	88	87	93	87	86	77	79	71	65
Germany	78	81	97	74	86	82	91	82	79	94	62	74	62
India	124	135	143	134	145	139	140	133	147	118	126	121	117
Mexico	103	98	113	100	99	100	89	121	116	112	102		
Mexico (air)	117	122	141	120	129	126	136	145	131	158	109	126	126
UK	75	84	89	85	87	83	87	91	88	97	74	77	87
China	47	47	54	60	65	71	64	47	60	60	53	50	49
Colombia	115	118	125	119	140	128	150	135	108	154	91	114	140
Dominican Republic	108	121	115	107	106	112	119	122	117	168	92	111	98

47 168

Source: NTTO (unless otherwise noted)

SYMPHONY TOURISM ECONOMICS

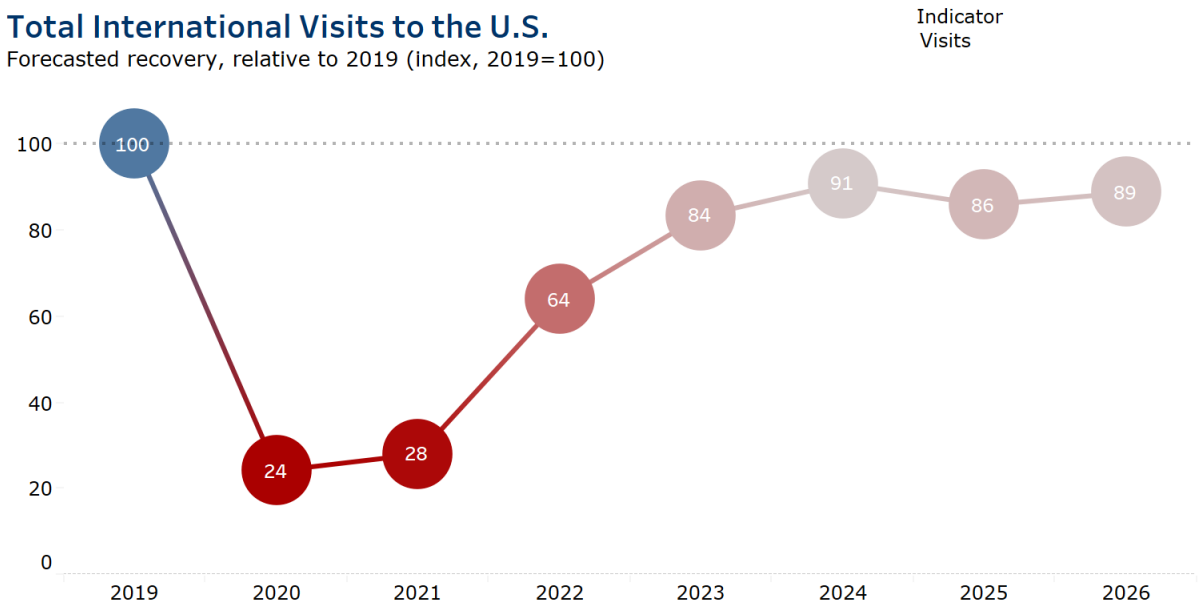
International Visitor Forecast

Forecasted in March, 2026

U.S. TRAVEL ASSOCIATION

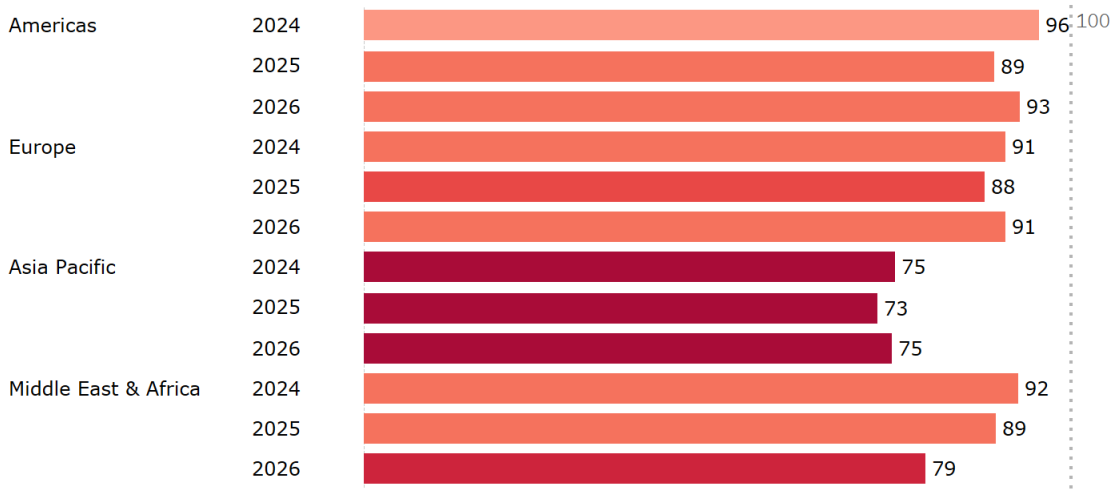
Total International Visits to the U.S.

Forecasted recovery, relative to 2019 (index, 2019=100)



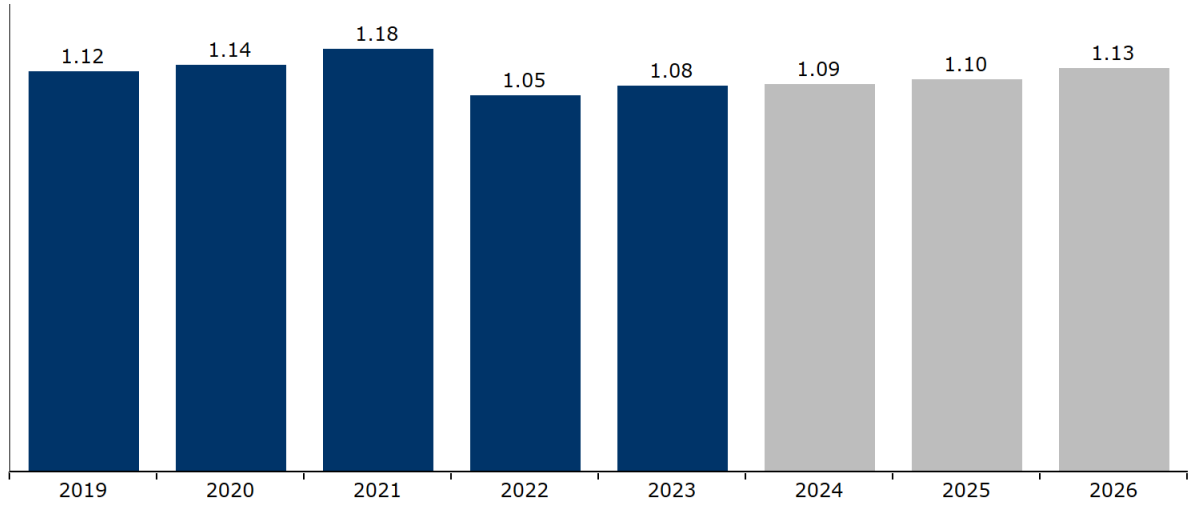
International Visits to the U.S. by World Region

Forecasted recovery for top-regions, relative to 2019 (index, 2019=100)



Exchange Rates

Forecasted exchange rate by year, US$ per EUR



International Visits to the U.S.

Forecasted recovery for top-10 origin markets, relative to 2019 (index, 2019=100)

	2024	2025	2026	2027	2028	2029
Canada	98	77	82	88	92	97
Mexico	92	98	101	104	107	110
United Kingdom	84	85	88	91	96	101
China	57	55	58	66	73	81
Japan	49	52	54	59	64	70
Brazil	91	91	94	97	100	104
Germany	97	86	89	93	97	102
Australia	78	73	74	78	83	89
France	93	86	89	95	100	106
South Korea	74	72	76	84	93	102

Date of Last Update: 29 March 2026

Source: Tourism Economics

SYMPHONY TOURISM ECONOMICS

U.S. Hotel Forecast

Forecasted in June 2026

U.S. TRAVEL ASSOCIATION

Insights

The updated hotel forecast released in June by Tourism Economics and STR reflects an improved outlook relative to the previous forecast released in February.

Travel indicators have demonstrated resiliency despite the conflict in Iran and rising prices for gas and other items. The solid year-to-date results prompted an upgrade for 2026.

RevPAR is forecast to rise 2.8% this year, versus modest growth of 0.6% in the previous forecast.

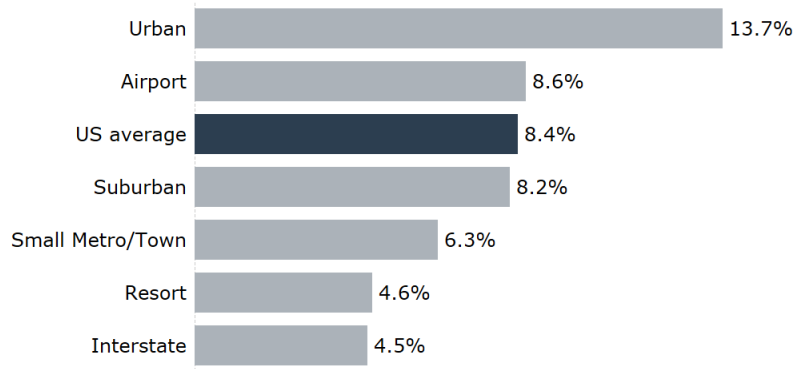
The increase in RevPAR will be driven by a 2.0% lift in the average daily rate and a 0.9% gain in the annual occupancy rate.

Demand is forecast to rise 1.3% in 2026, outpacing the 0.4% increase in supply.

The economic outlook is clouded by the situation in Iran, which has led to forecasts of higher inflation and slower economic growth this year. However, the travel industry is well-positioned to weather the headwinds as there have been few signs of an increase in layoffs, the unemployment rate remains low, and household balance sheets are in good condition.

U.S. Actual RevPAR Growth by Location

June 2026, % change relative to last year



Source: STR

U.S. Hotel Forecast Summary

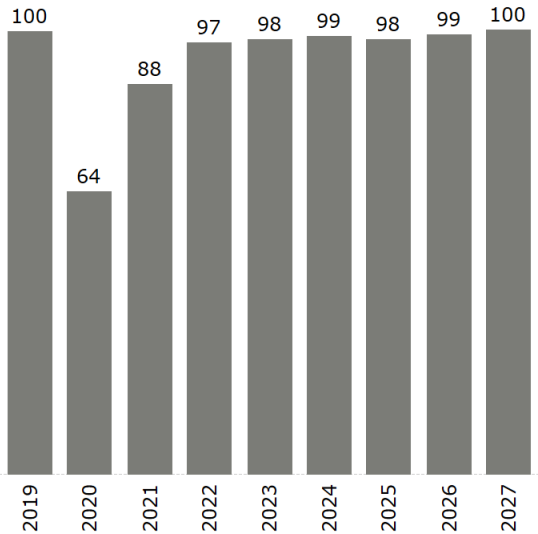
YOY % change, Forecast released June 2026

	2021	2022	2023	2024	2025	2026	2027
Supply	4.9%	1.7%	0.2%	0.5%	0.7%	0.4%	0.8%
Occupancy	31.0%	8.8%	0.7%	0.1%	-1.2%	0.9%	0.2%
Demand	37.4%	10.6%	0.9%	0.5%	-0.6%	1.3%	1.0%
ADR	20.7%	19.9%	4.4%	1.8%	1.0%	2.0%	1.4%
RevPAR	58.2%	30.4%	5.2%	1.9%	-0.3%	2.8%	1.6%
RevPAR relative to 2019	-17.2%	8.1%	13.7%	15.9%	15.6%	18.9%	20.7%

Source: STR; Tourism Economics

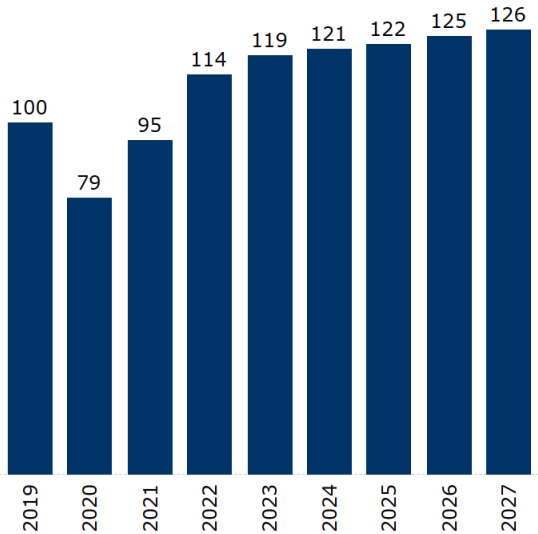
Occupancy Index

Index (2019 = 100)



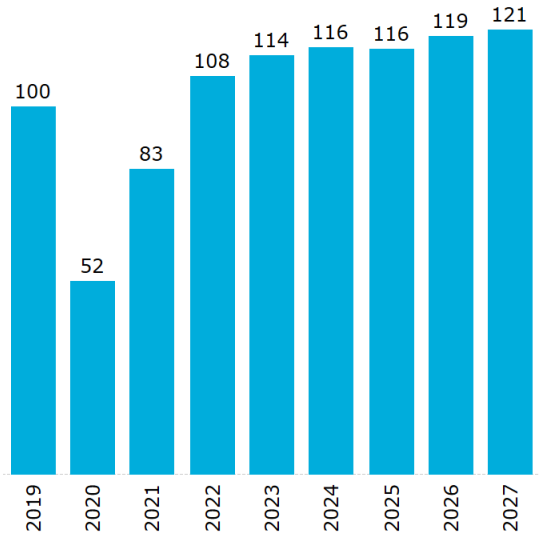
ADR Index

Index (2019 = 100)



RevPAR Index

Index (2019 = 100)



Source: STR; Tourism Economics

SYMPHONY TOURISM ECONOMICS

Data Sources and Partners

U.S. TRAVEL ASSOCIATION

The U.S. Travel Association and its members wish to thank each of these organizations for their generous contributions of valuable data and insights to the U.S. Travel Recovery Tracker

Longwoods INTERNATIONAL

MMGY Global

Future Partners

simpleview

TravelClick an AMADEUS company

OXFORD ECONOMICS

str

AIRLINE DATA INC

BLS

INTERNATIONAL TRADE ADMINISTRATION

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Commerce Signals
A TransUnion® Company

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