

2025 TRAVEL PLANS

American Travel Sentiment Study

WAVE 94: POLITICAL IMPACT ON TRAVEL

MARCH 20, 2025

Longwoods
INTERNATIONAL

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PARTNERSHIP

American Travel Sentiment Wave 94 Highlights

Key Findings:

- A majority of respondents (**83%**) expect travel costs to either **become less affordable** or **remain the same** in the next year.
- Perceptions of travel affordability vary by political affiliation. A majority of **Democrats** (57%) anticipate higher costs, while **Republicans** are the most optimistic, with 22% expecting travel to become more affordable. **Independents** fall in between, with 45% believing costs will remain the same.
- Since September 2024, the percentage of travelers who say **Politics will Greatly impact** their travel choices **has jumped from 24% to 42%**.
- Travel intentions vary significantly by political affiliation. **Democrats** are the most likely to **reduce domestic travel** (32%), while **Republicans** (35%) and **Independents** (34%) are more inclined to travel **more within the U.S.** Meanwhile, nearly half of Republicans (47%) say political factors do not influence their travel decisions, compared to 36% of Democrats.
- Travelers are increasingly adjusting their U.S. travel plans based on political factors. Since November 2024, the percentage of people **avoiding specific cities or states** has **surged from 12% to 20%**, and those altering itineraries to avoid certain areas increased from 10% to 15%. Meanwhile, **those unaffected by politics** dropped from 60% to 46%.



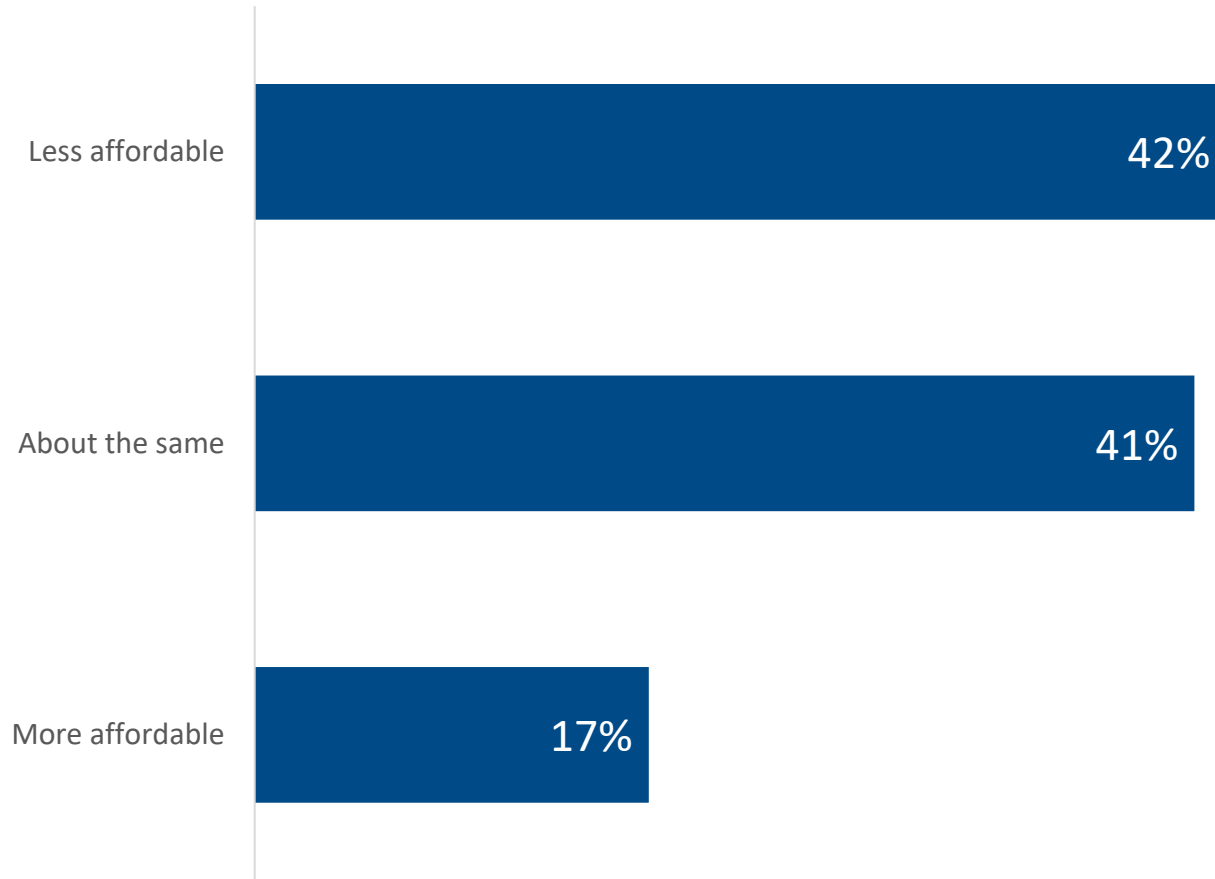
Travel Plans Within Next 6 Months



89% of American Travelers have travel plans within the **next six months.**

Travel Affordability Concerns: Most Expect Higher or Steady Costs

Do you expect travel to become more/less affordable in the next year?

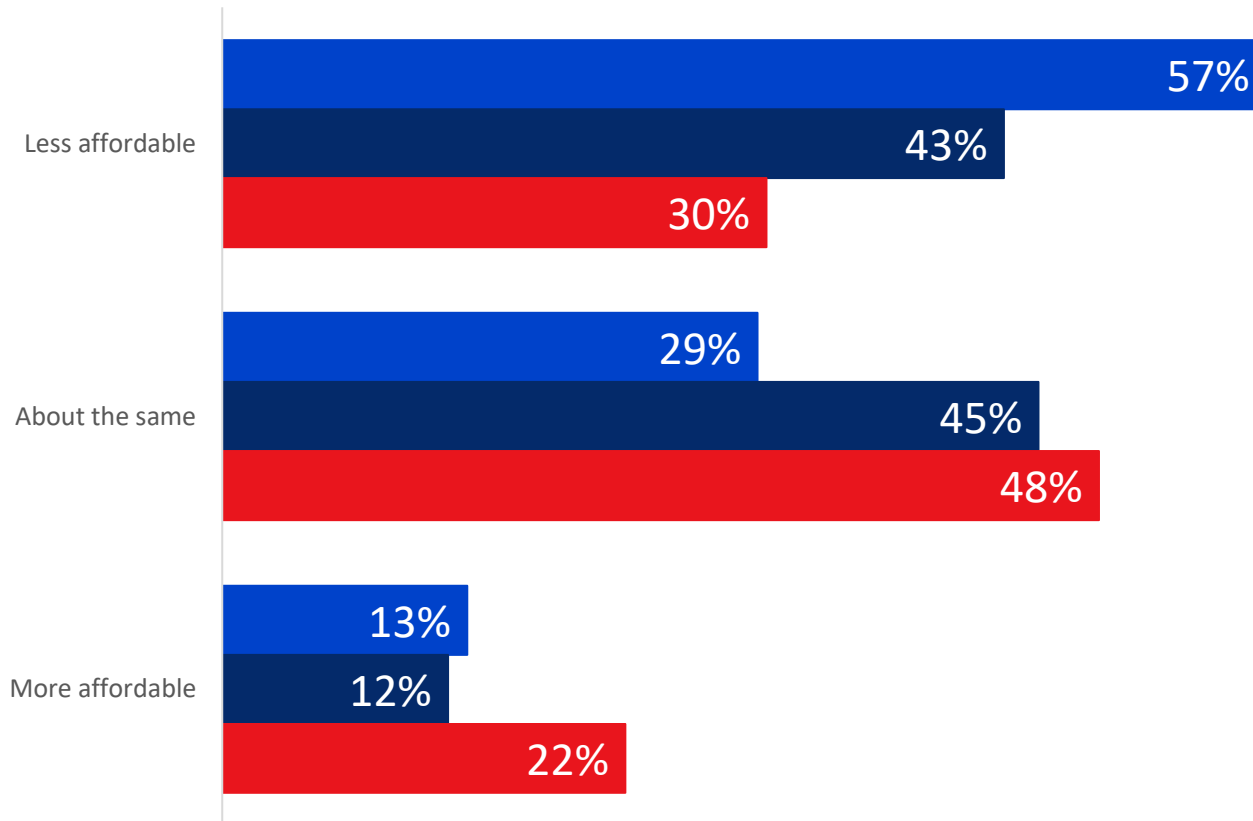


A majority of respondents (83%) expect travel costs to become less affordable or remain the same in the next year. This suggests growing concerns about personal finances, the economy, inflation, airfare, and accommodation prices impacting travel decisions.

Travel Cost Expectations Split Along Party Lines

Do you expect travel to become more/less affordable in the next year?

■ Democrat ■ Independent ■ Republican

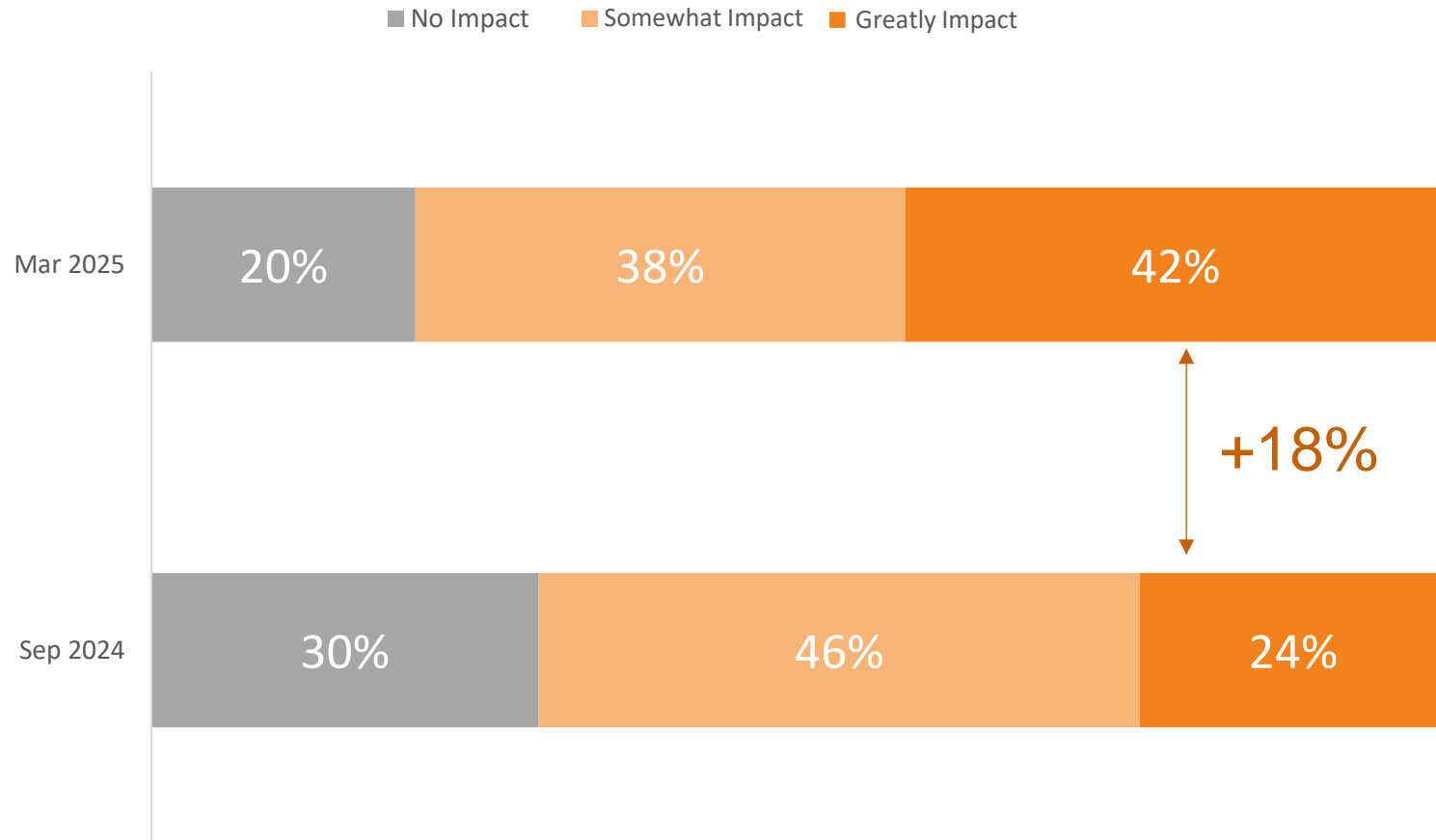


Perceptions of travel affordability vary by political affiliation. A majority of **Democrats** (57%) anticipate higher costs, while **Republicans** are the most optimistic, with 22% expecting travel to become more affordable.

Independents fall in between, with 45% believing costs will remain the same. This suggests economic outlooks and inflation concerns may be influenced by political perspectives.

Growing Influence of Politics on Travel Decisions

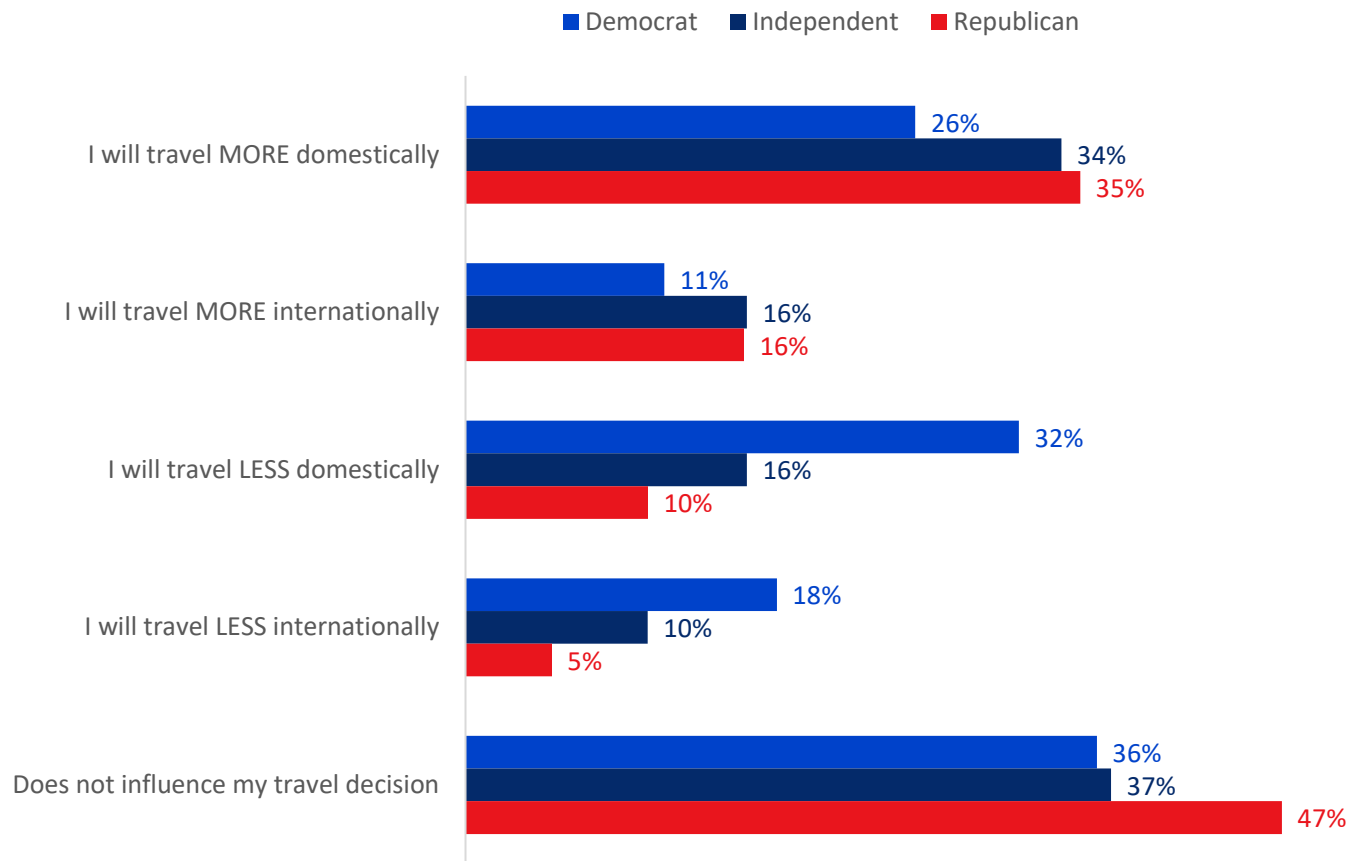
To what extent does the political climate of a destination influence your decision to visit?



The political climate of a destination is becoming a more significant factor in travel decisions. Since September 2024, the percentage of travelers who say **politics will Greatly impact their travel choices has jumped from 24% to 42%**, while those saying it will have no impact has dropped from 30% to 20%. This shift suggests increasing polarization and heightened political awareness are shaping travel behaviors more than before.

Political Affiliation and Shifting Travel Plans

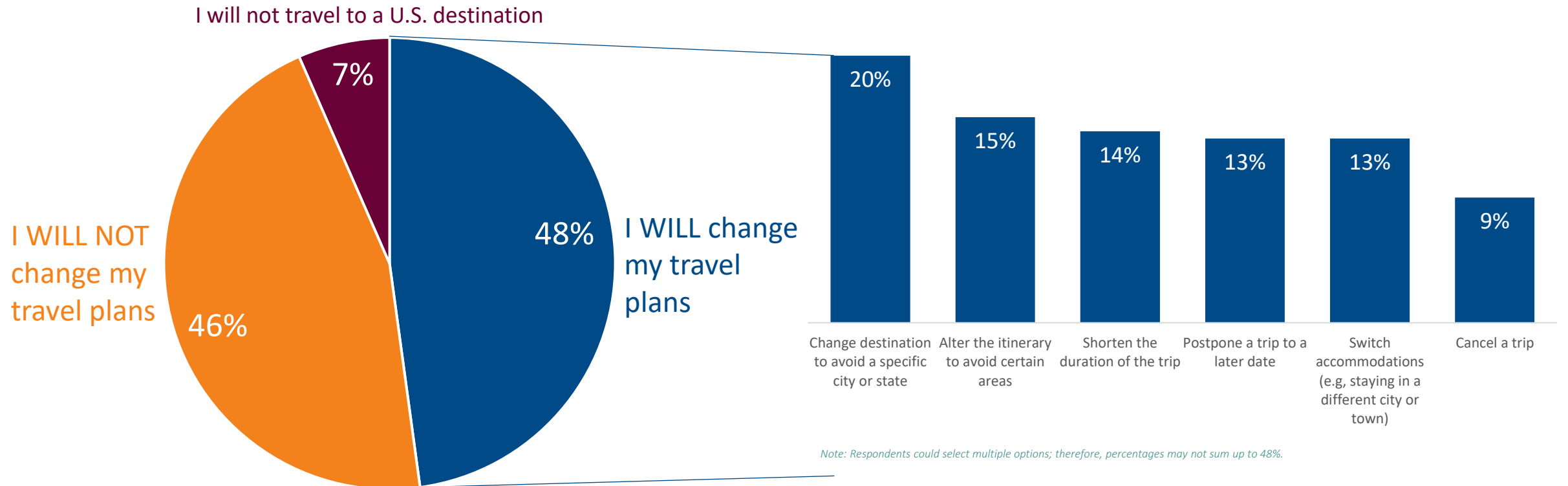
How will the current administration influence your leisure travel plans in the next year?



Travel intentions vary significantly by political affiliation. **Democrats** are the most likely to **reduce domestic travel** (32%), while **Republicans** (35%) and **Independents** (34%) are more inclined to travel **more within the U.S.** Meanwhile, nearly half of Republicans (47%) say political factors do not influence their travel decisions, compared to 36% of Democrats. This suggests that political perspectives may shape both the frequency and destinations of travel choices.

Half of Travelers Rethink U.S. Trips Due to Politics

In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?

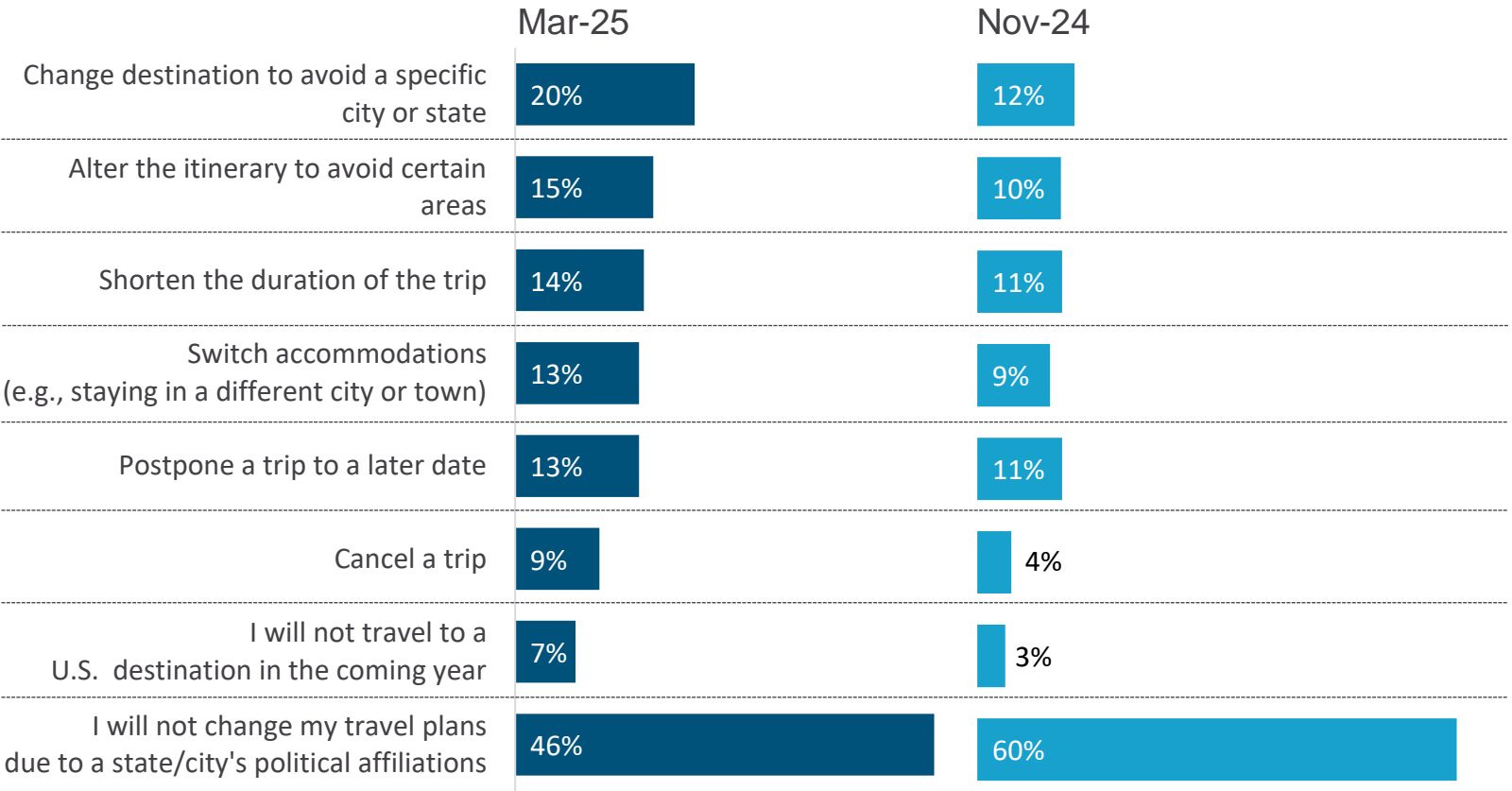


Note: Percentages may add up to more than 100% due to rounding.

Note: Respondents could select multiple options; therefore, percentages may not sum up to 48%.

Political Influence on U.S. Travel Plans Grows from Nov 2024 to Mar 2025

In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?



Travelers are increasingly adjusting their U.S. travel plans based on political factors. Since November 2024, the percentage of people **avoiding specific cities or states has surged from 12% to 20%**, and those altering itineraries to avoid certain areas increased from 10% to 15%. Meanwhile, **those unaffected by politics dropped from 60% to 46%**, highlighting a growing trend of politically motivated travel decisions.

Source: Longwoods International ATS Wave 94 survey fielded in March 2025 vs Wave 91 survey fielded in November 2024
 Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Political Discontent a Major Concern Among All Travelers

You indicated that you will change your travel plans in the upcoming year. In three to five words please note what specific legislation, policies, or political affiliations caused you to change your travel plans.

Concerns for Democrats



Concerns for Independents



Concerns for Republicans

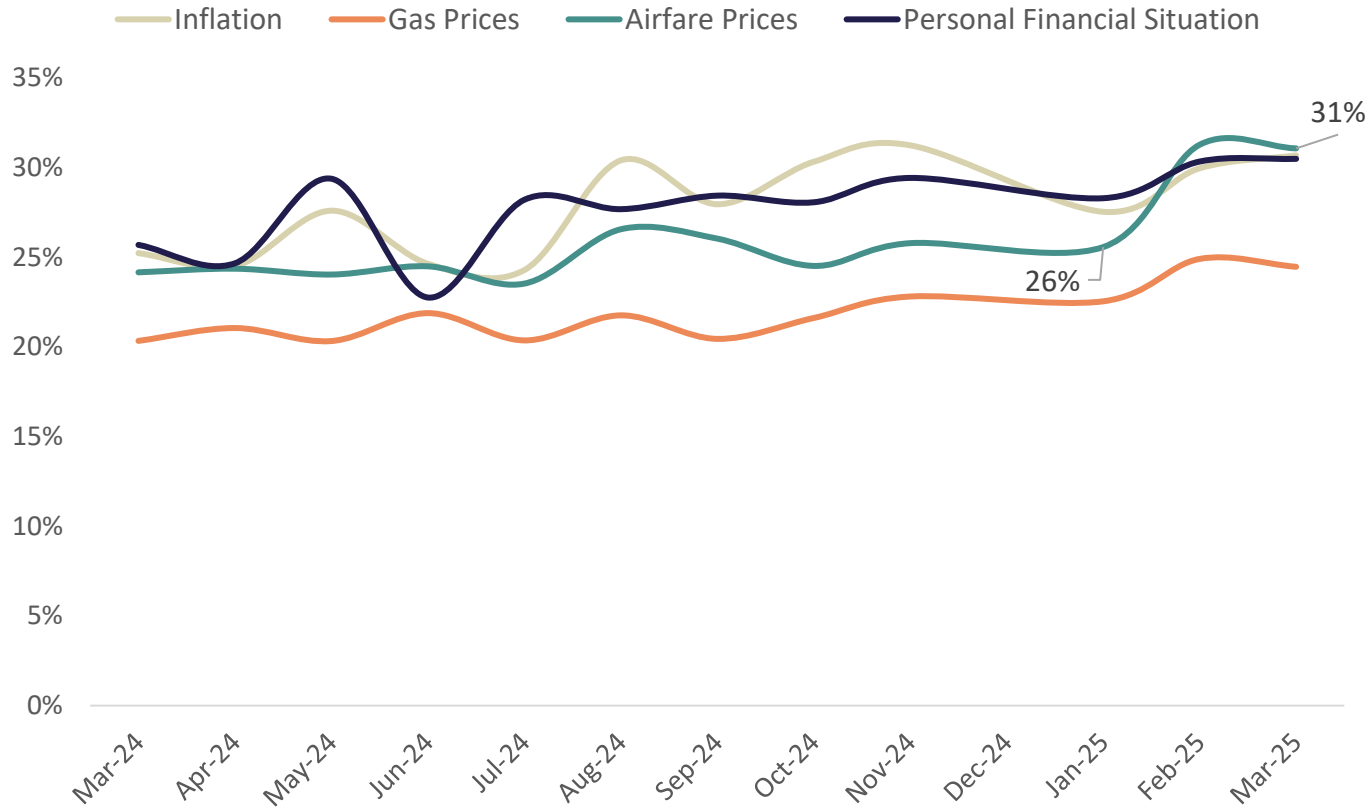


Note: This data reflects responses to an open-ended question about why they changed travel plans, where participants mentioned specific legislation, policies, or political affiliations that caused them to change travel plans. The font size corresponds to the frequency of each issue mentioned, highlighting the most popular issues among American travelers.

Increased Impact of Airfare Prices on Travel Plans: January 2025 vs. March 2025

Trends in Factors with Great Impact on Travel Plans (Mar'24 – Mar'25)

The chart illustrates the monthly trends in the share of travelers indicating that Inflation, Gas Prices, and Airfare Prices have a **Great Impact** on their future travel plans.



The impact of airfare prices on travel plans appears to continue to be a concern for travelers. In February and March, 31% of travelers indicated that airfare prices had a great impact on their future travel plans, an **increase from January where it was 26%**. Meanwhile, concerns about personal financial situations, inflation, and gas prices remained stable.

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: March 3, 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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