

Future Partners



Unpacking Today's Emerging Trends

David Reichbach

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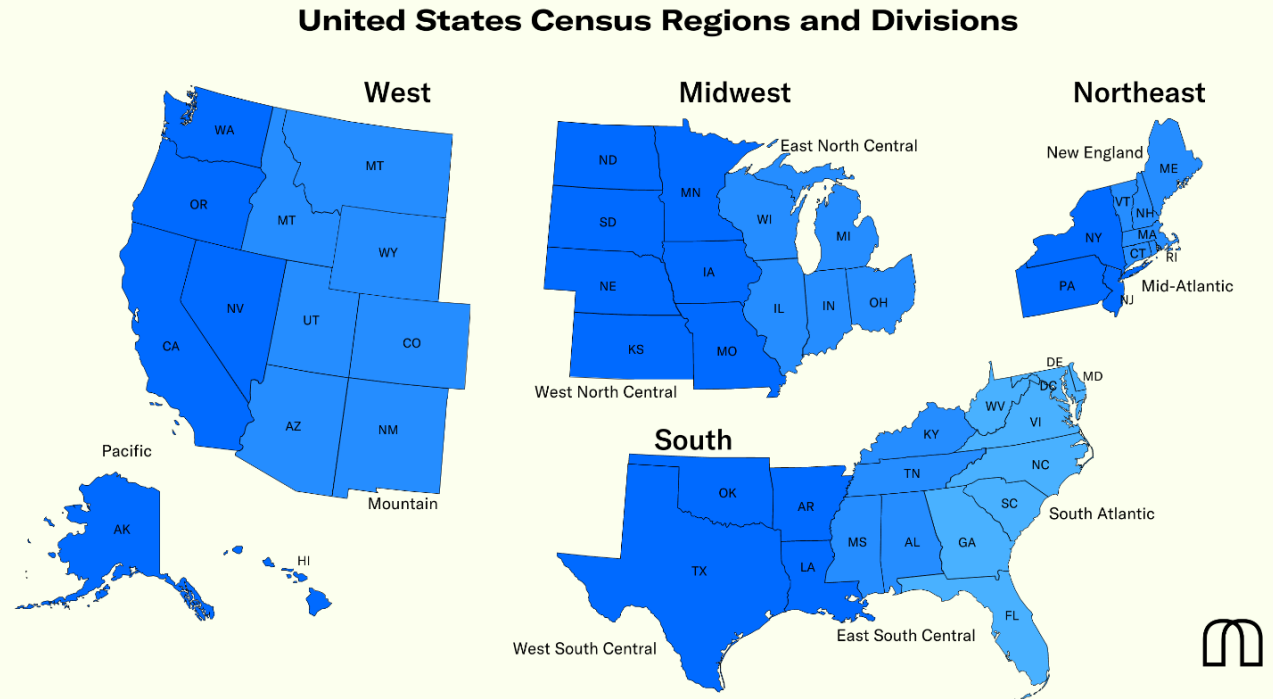


Bringing the future of travel
within reach

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The State of the American Traveler

- 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 **August 16-28**
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Traveler Sentiment

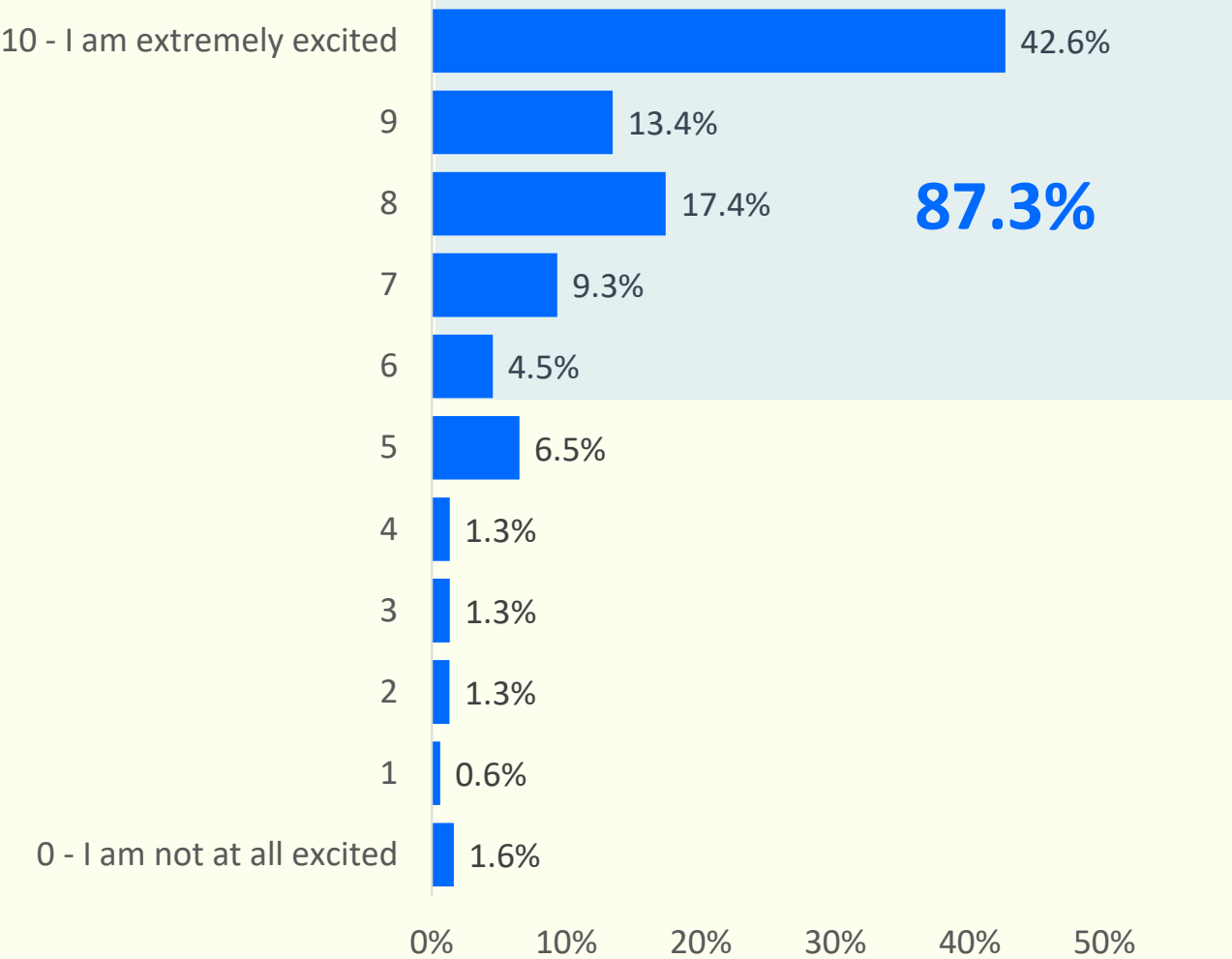


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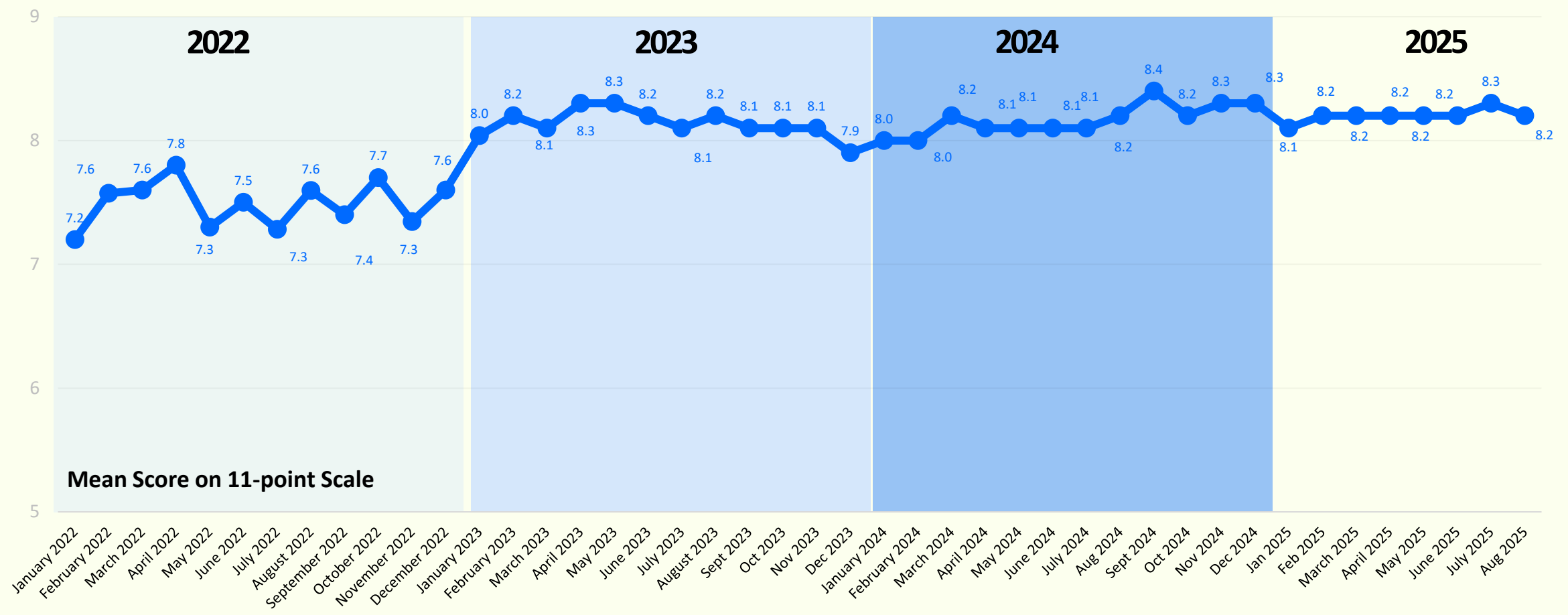
Americans' Excitement for Travel Remains Elevated

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



Americans' Excitement for Travel Remains Elevated

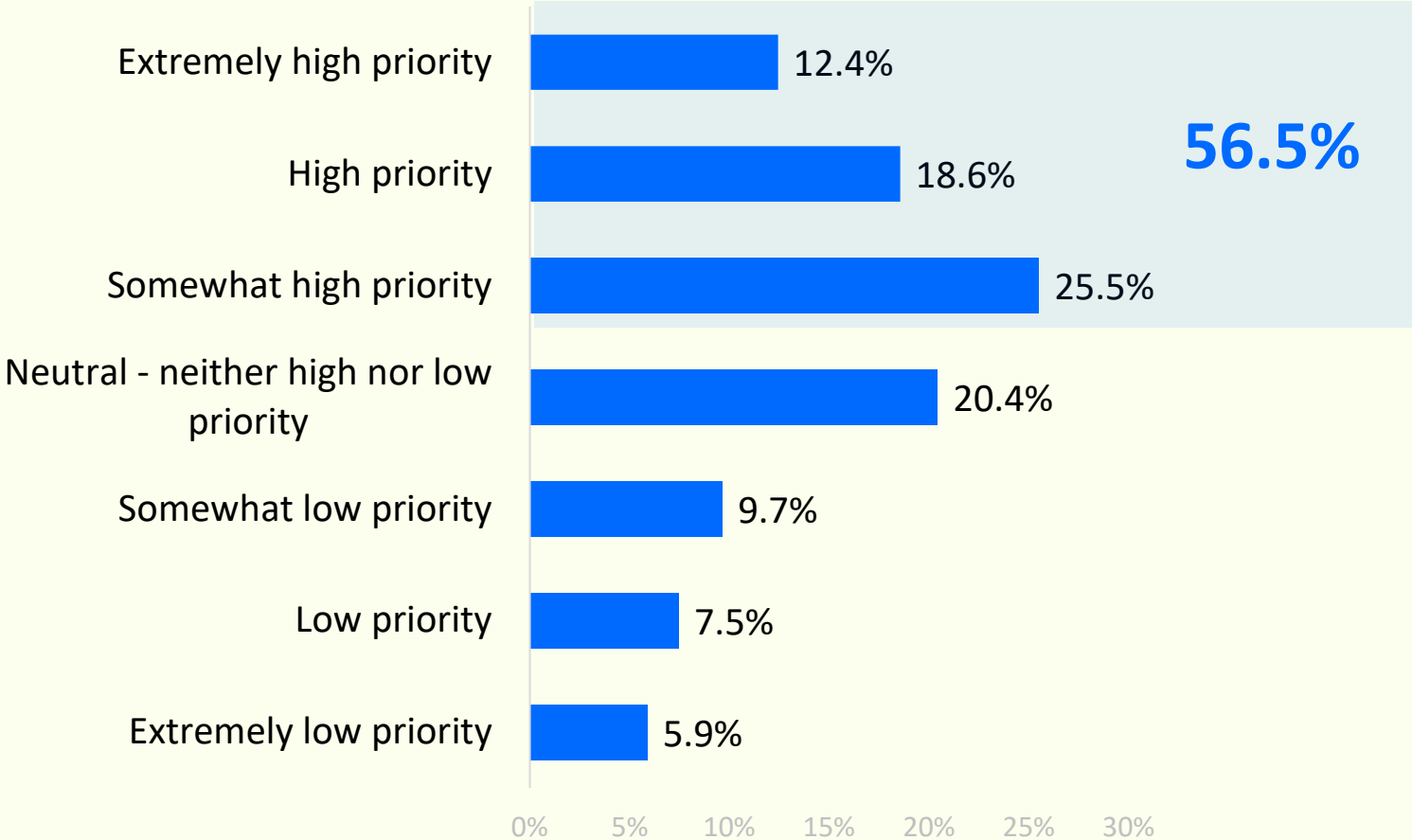
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Travel as a Budget Priority Slips Below Last Year

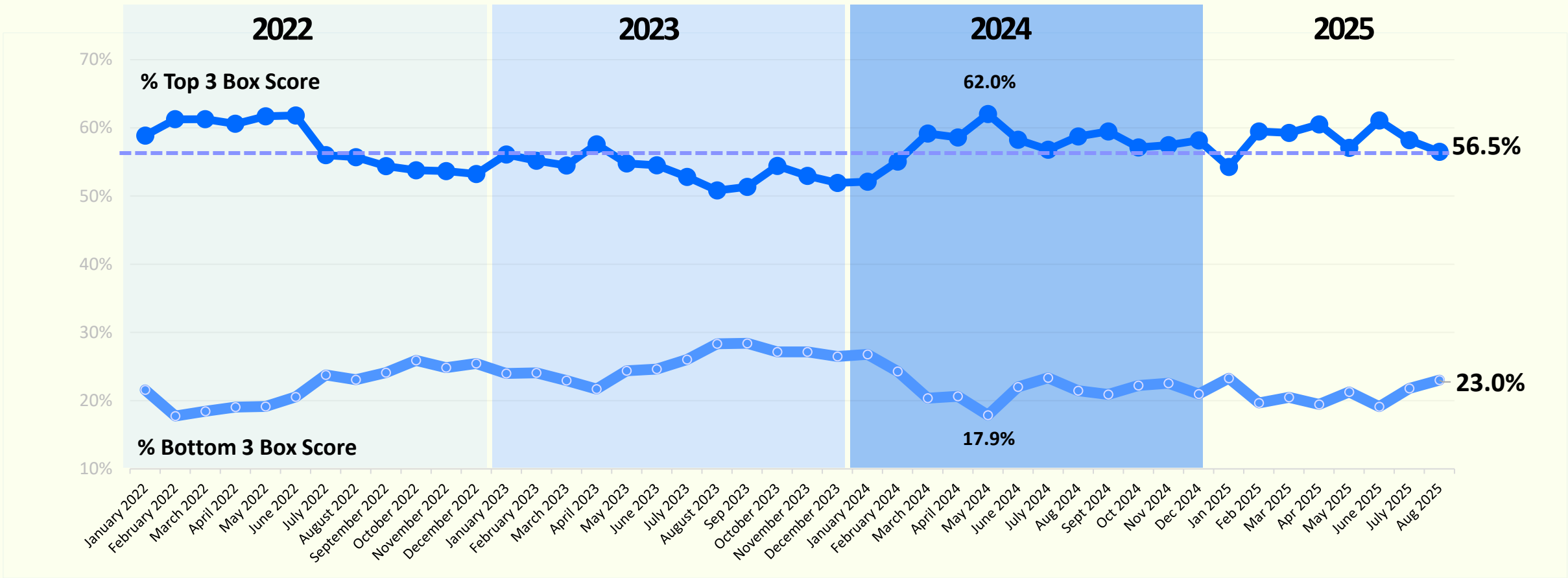
Question:
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n)
_____.



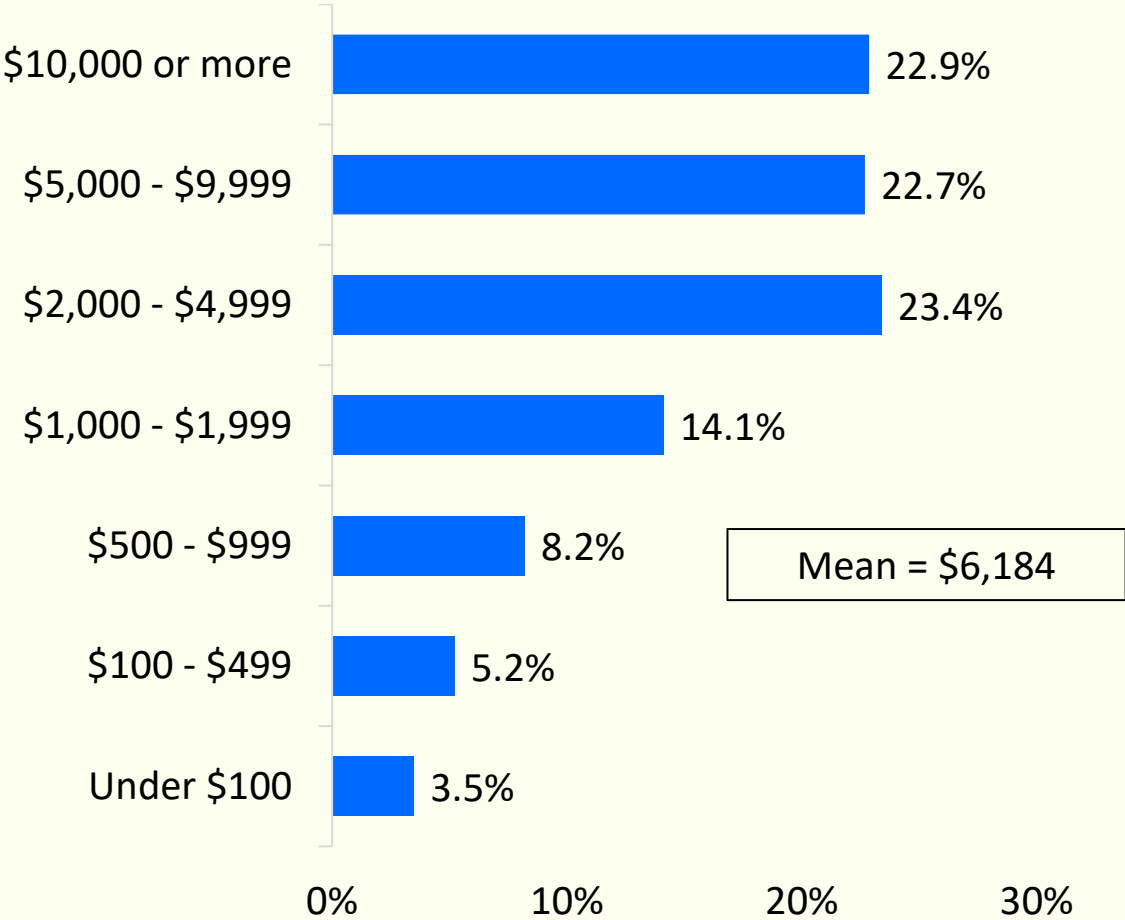
Travel as a Budget Priority Slips Below Last Year

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.



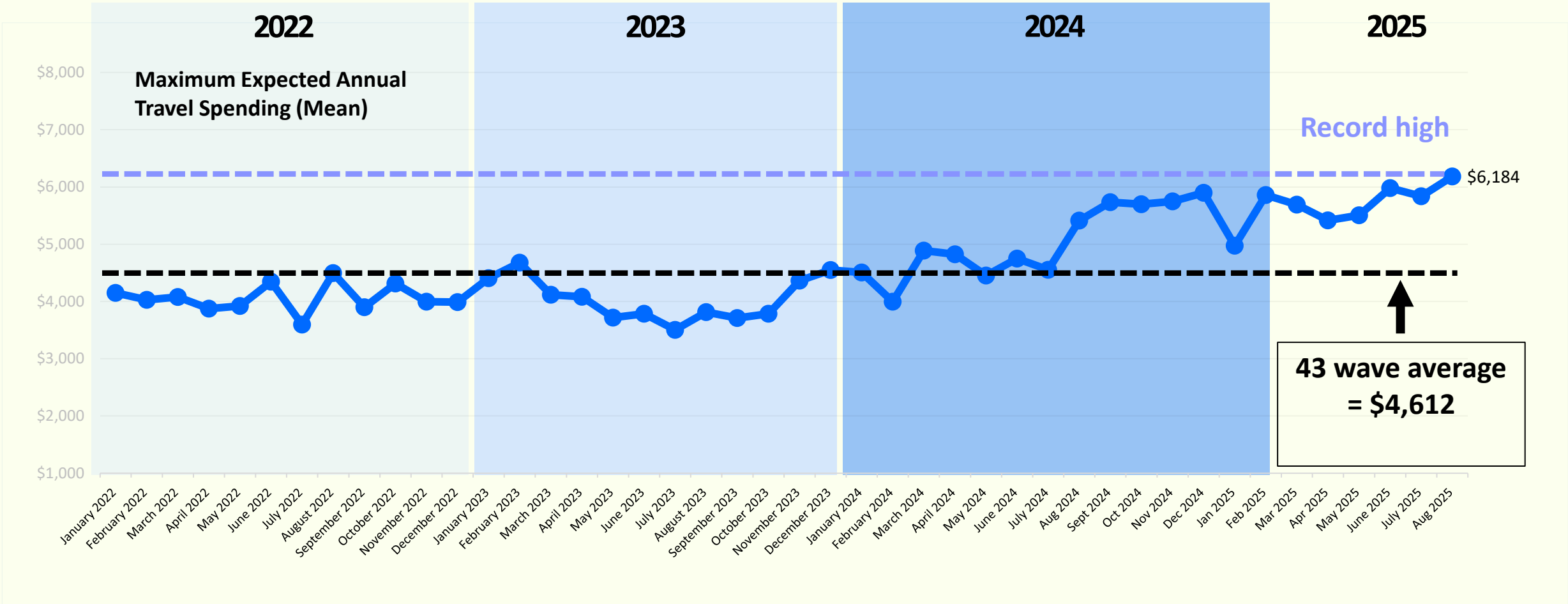
Expected Travel Budgets Reach a New High

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 Reach a New High

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):



Looking Forward

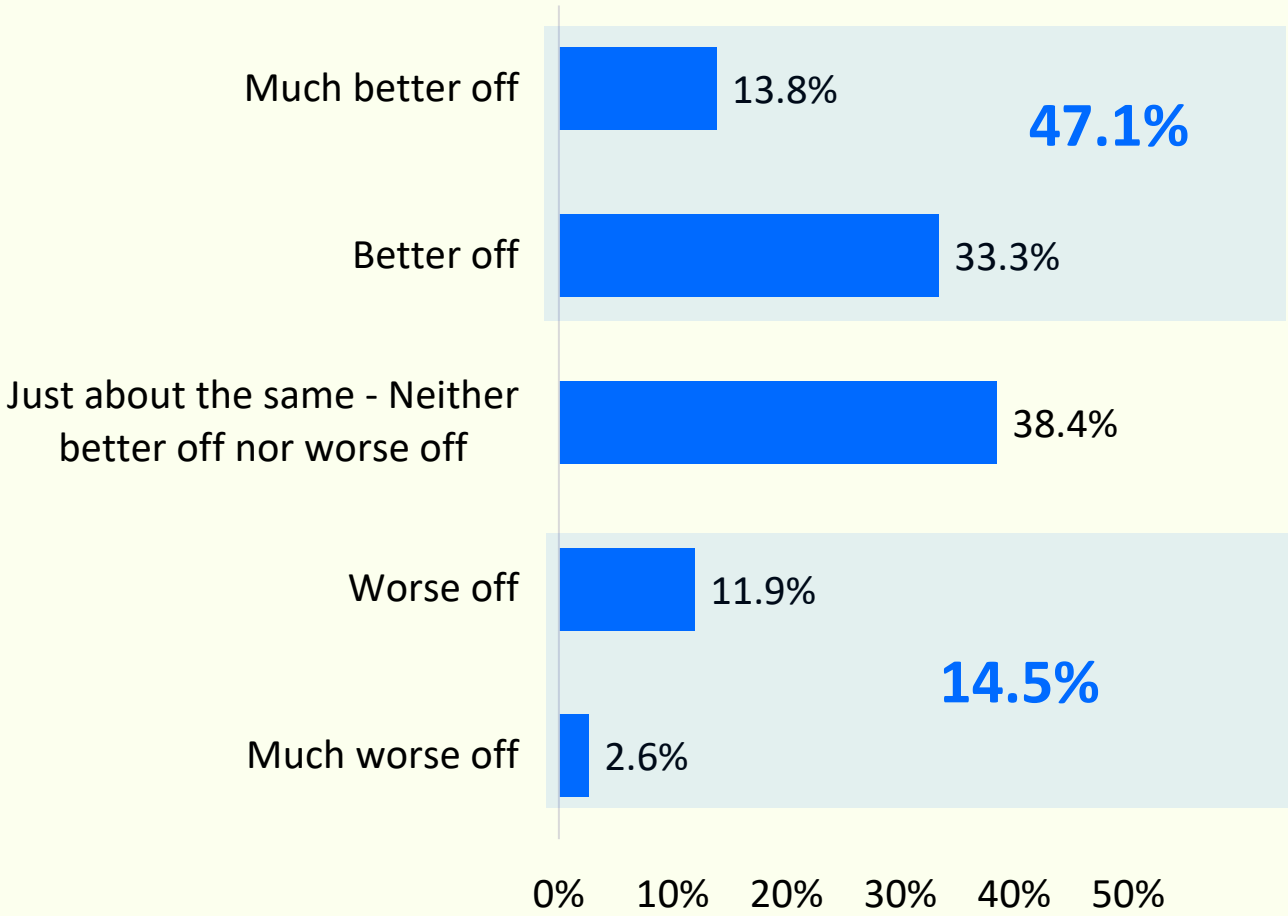
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Traveler Confidence in Financial Future Improves Again

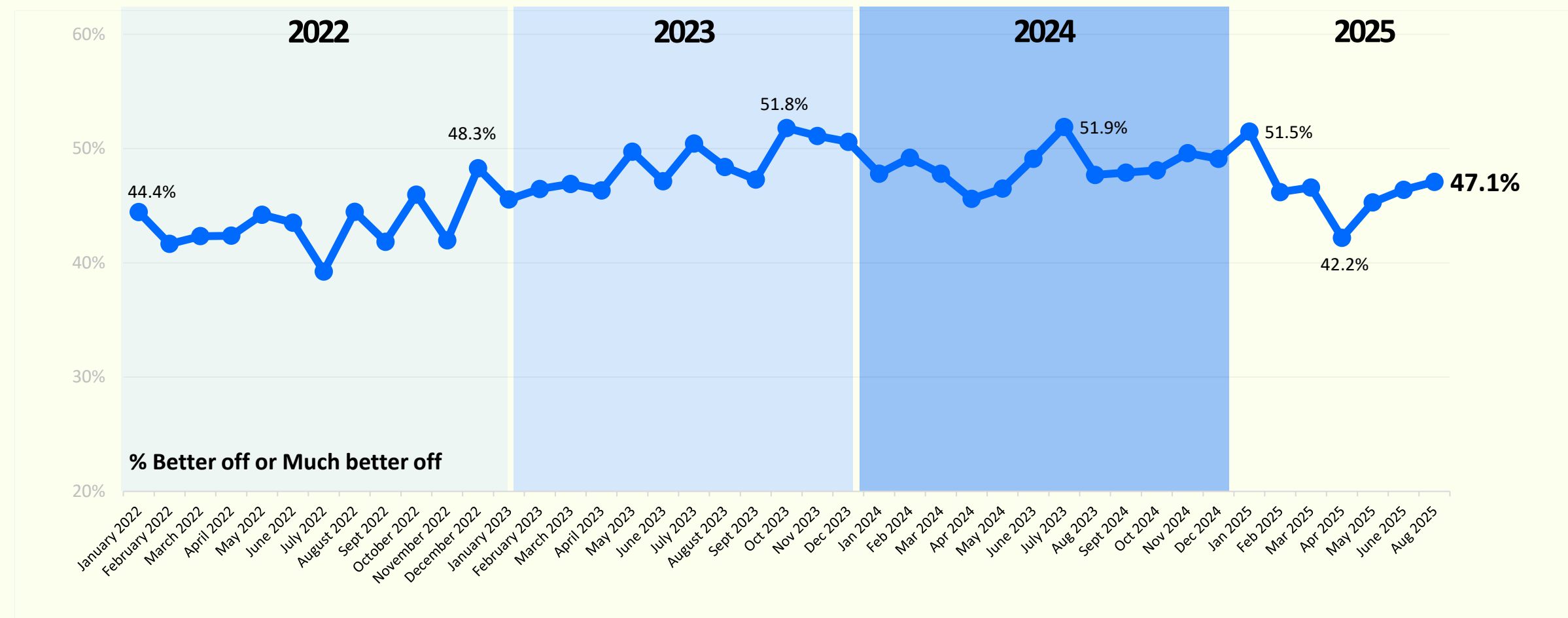
Question:

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?



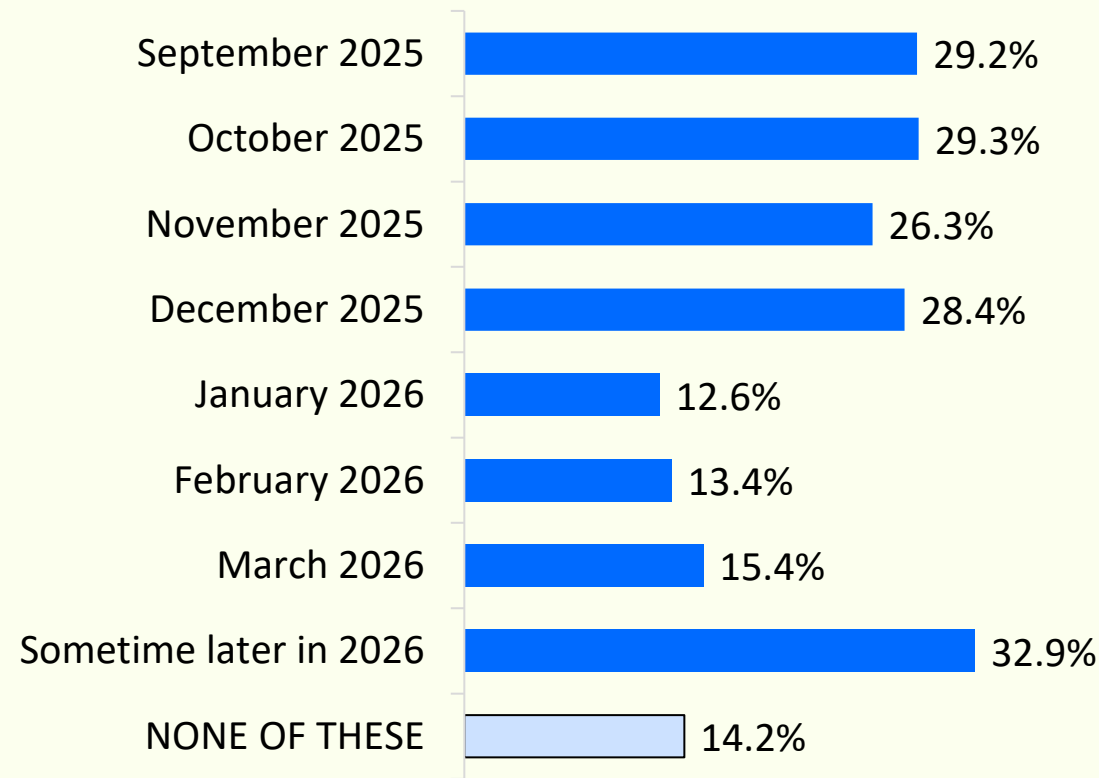
Traveler Confidence in Financial Future Improves Again

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?



Nearly 86% of Travelers Have at Least One Trip Currently Planned

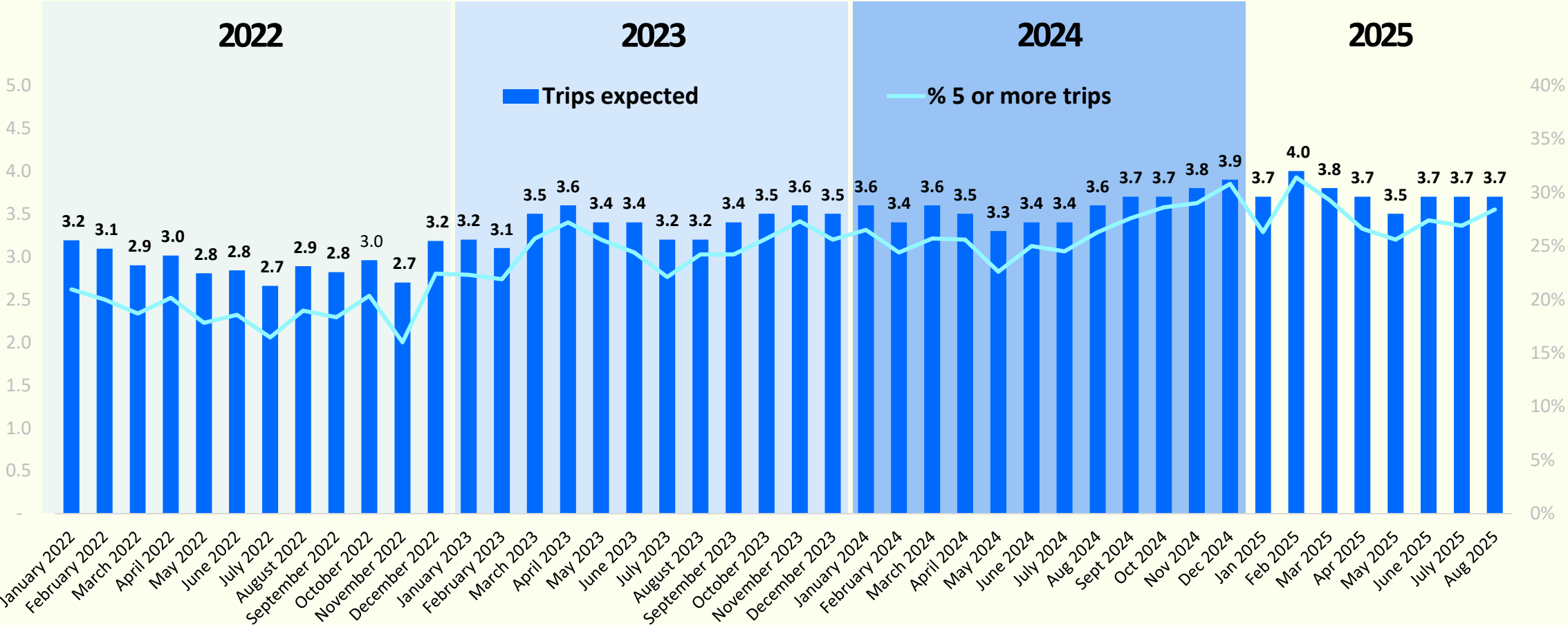
Question: In which months do you currently have any leisure trips planned (even if only tentatively)?



85.8%
have at least one trip
currently planned

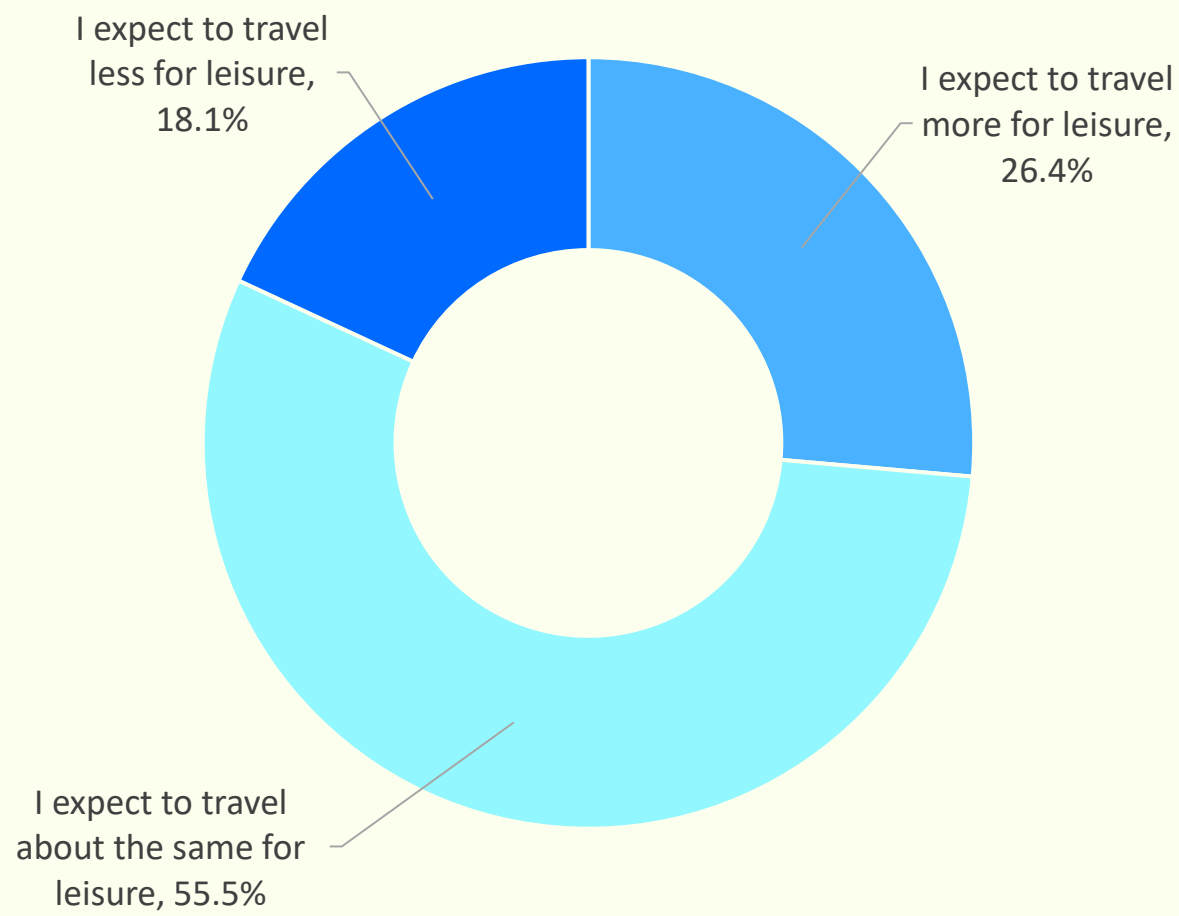
Expected Trip Volume Holds Steady This Month

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?



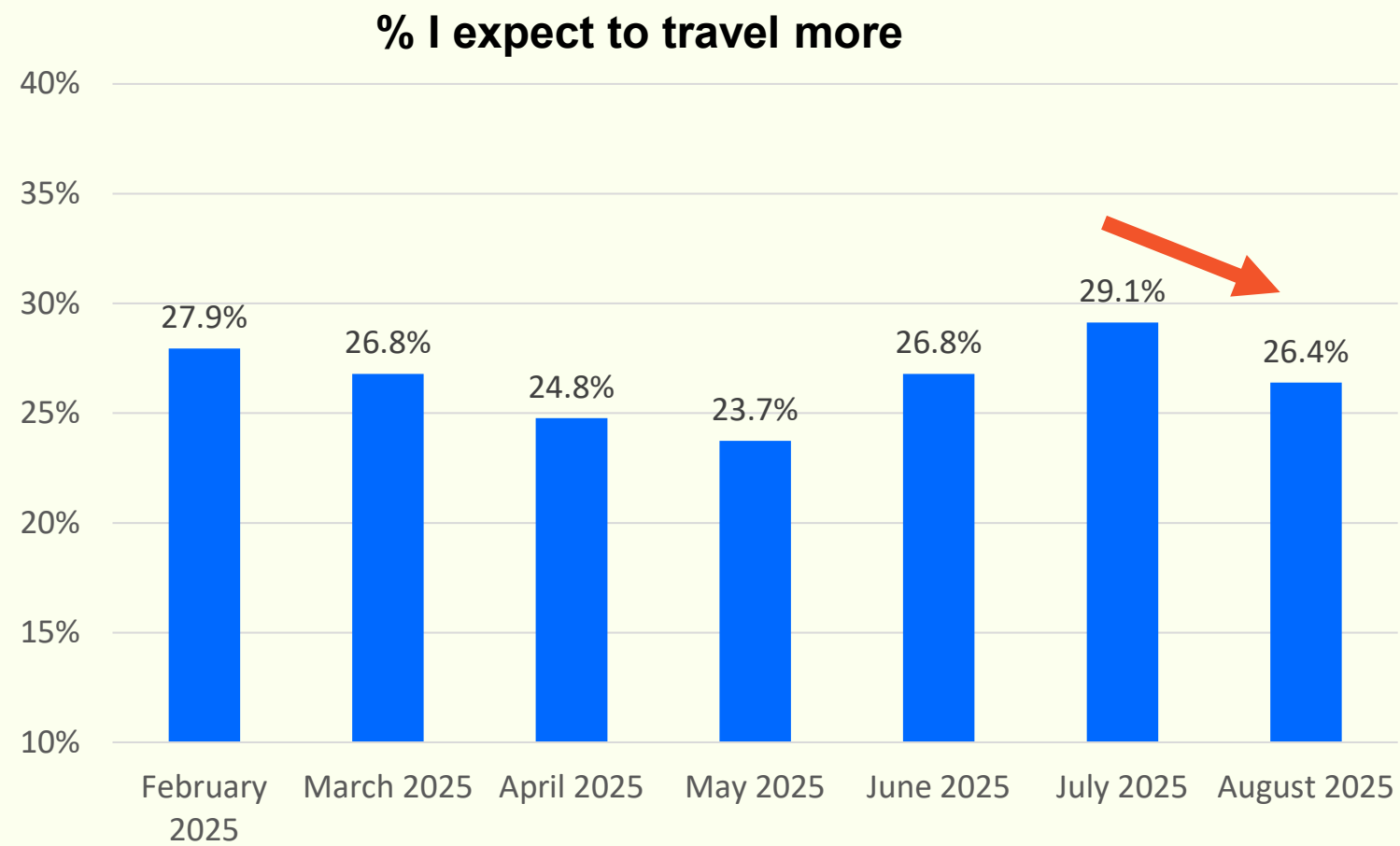
Plans to Travel More Next Year Decline

Question:
In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period?
(Select one)



Plans to Travel More Next Year Decline

Question:
In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)



The Impact of a US Recession on Travel Sentiment



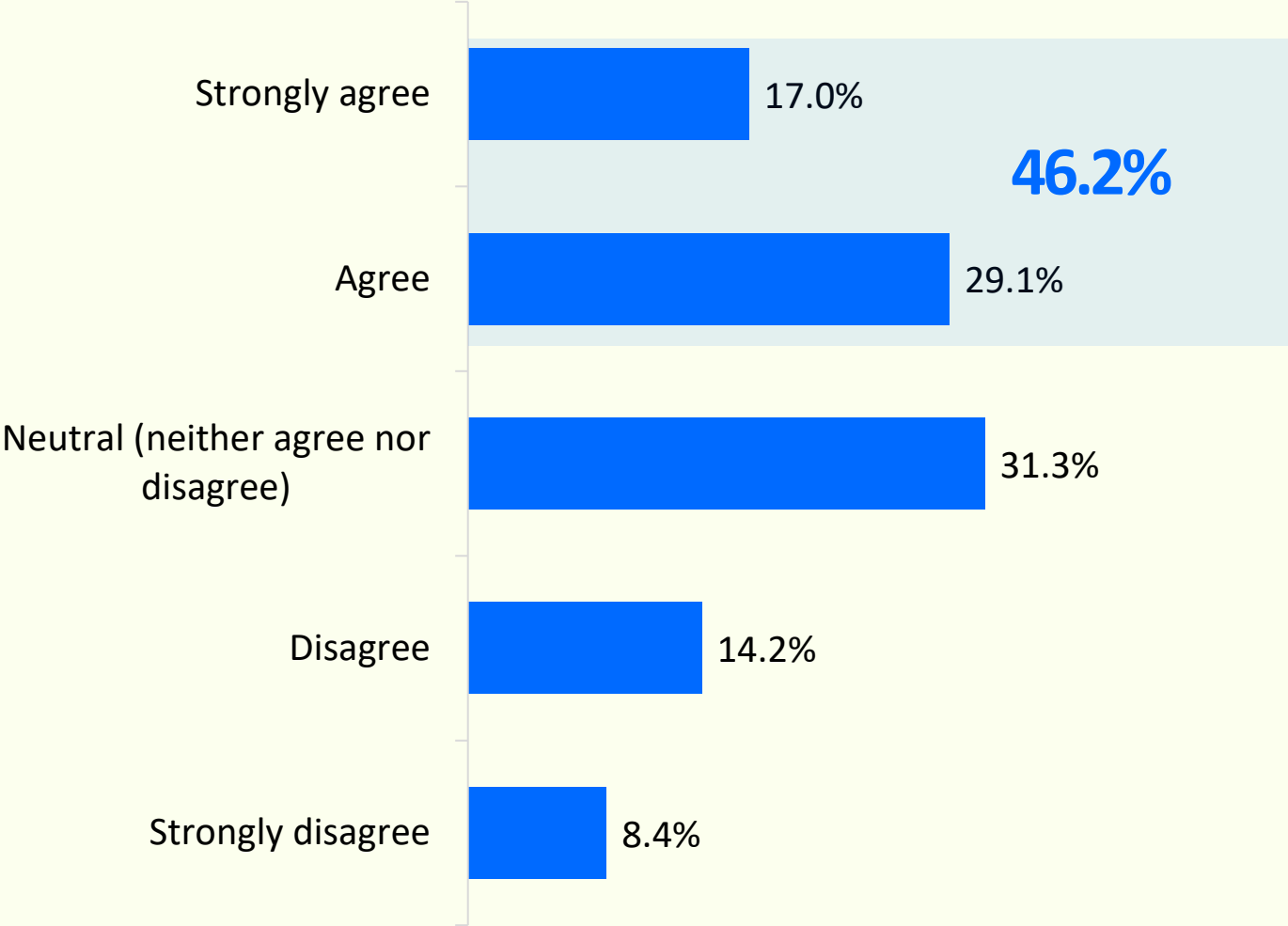
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Recession Concerns Among American Travelers Unchanged This Month

Question:

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



Recession Concerns Among American Travelers Unchanged This Month

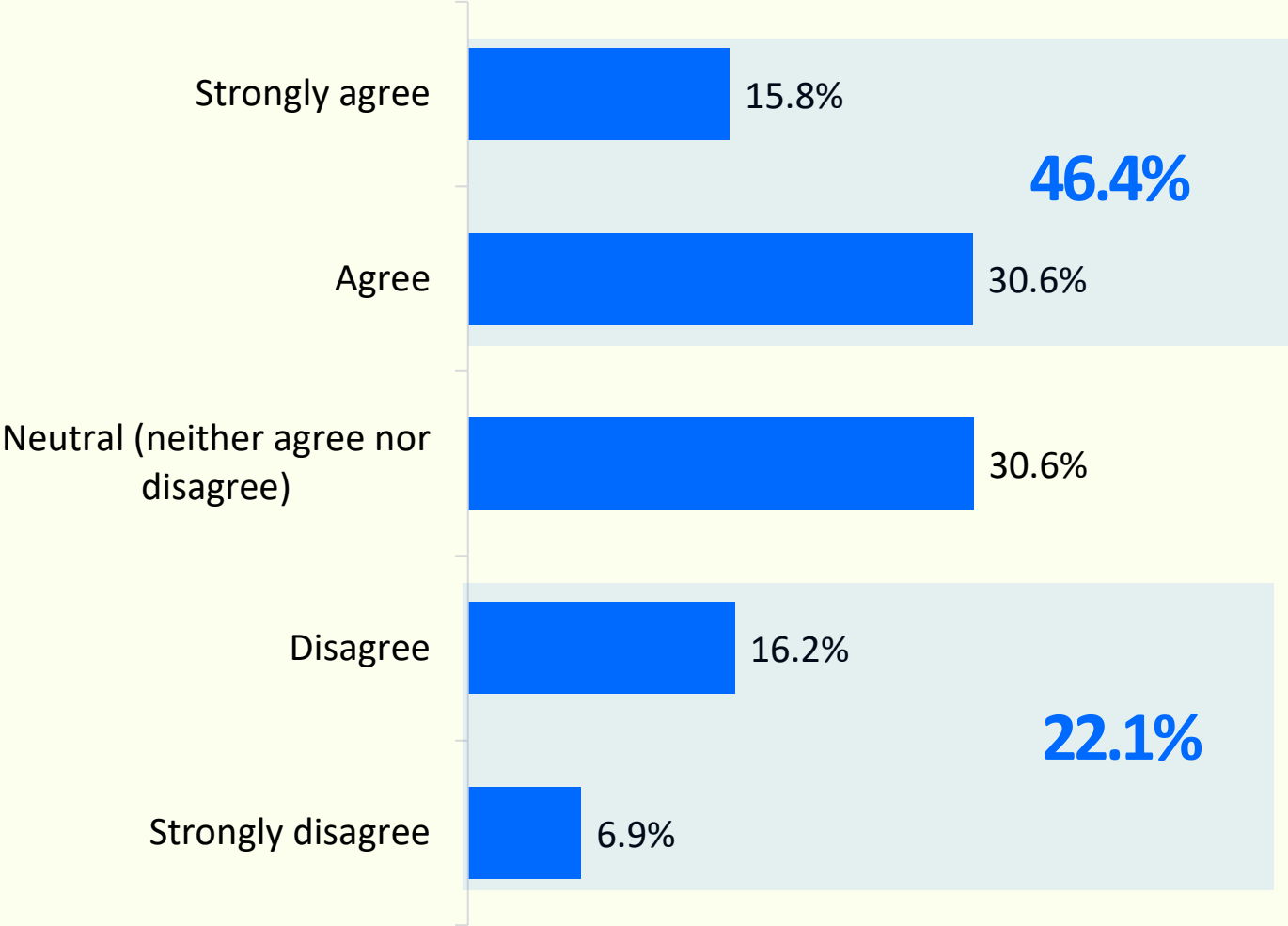
Statement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Nearly Half of Travelers Cautious With Money Amid Economic Concerns

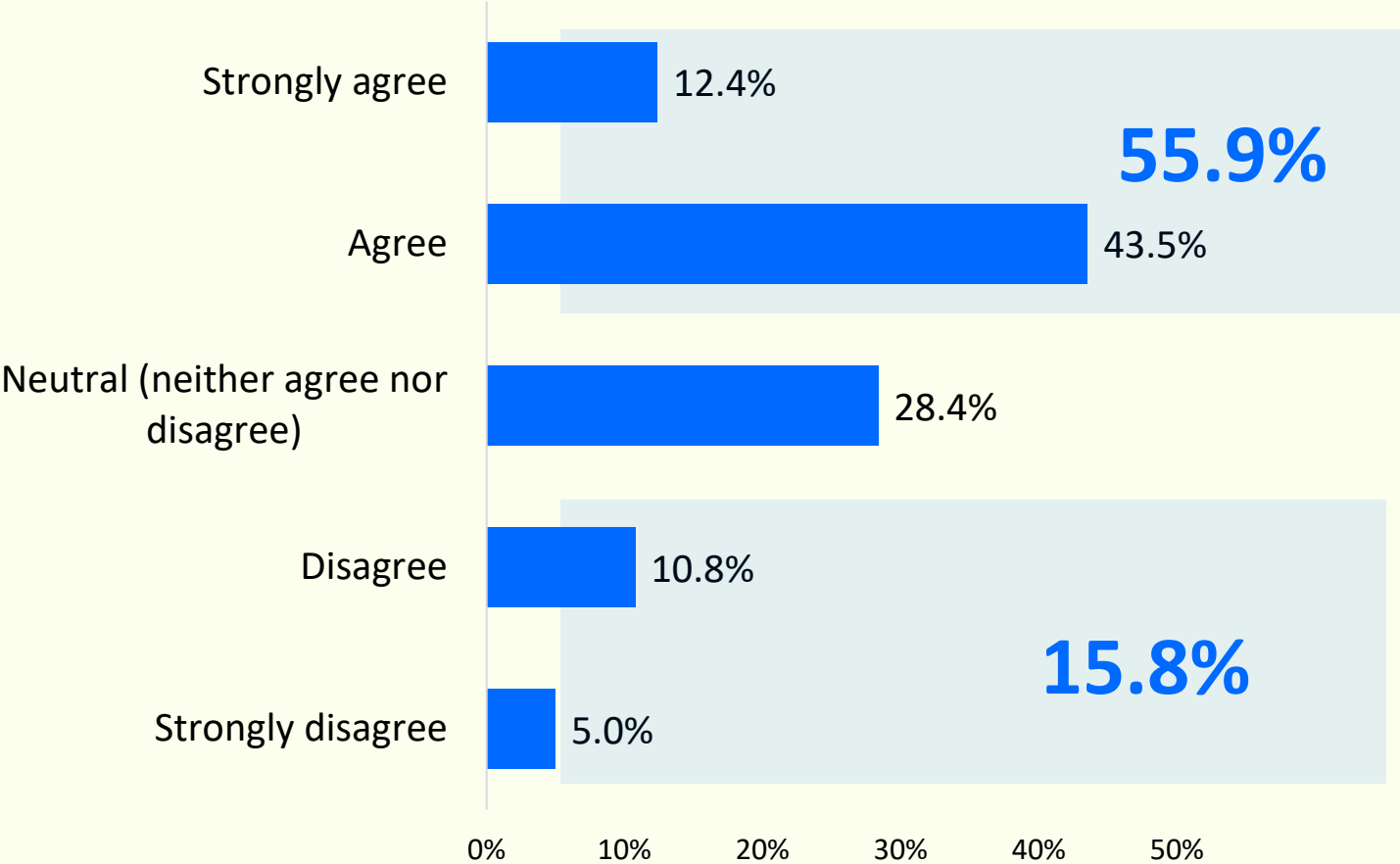
Question:

Right now, I am being careful with my money because I'm concerned about an upcoming recession.



56% Say Travel Is a Worthwhile Investment Even in an Economic Downturn

Question:
Even in an economic recession, I'd consider travel to be a worthwhile investment.





Hawai'i Oriented Travelers

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Demographics

Recent Visitors to Hawaii (Past 12 Months)

Year

2025 YTD

Curated Collections

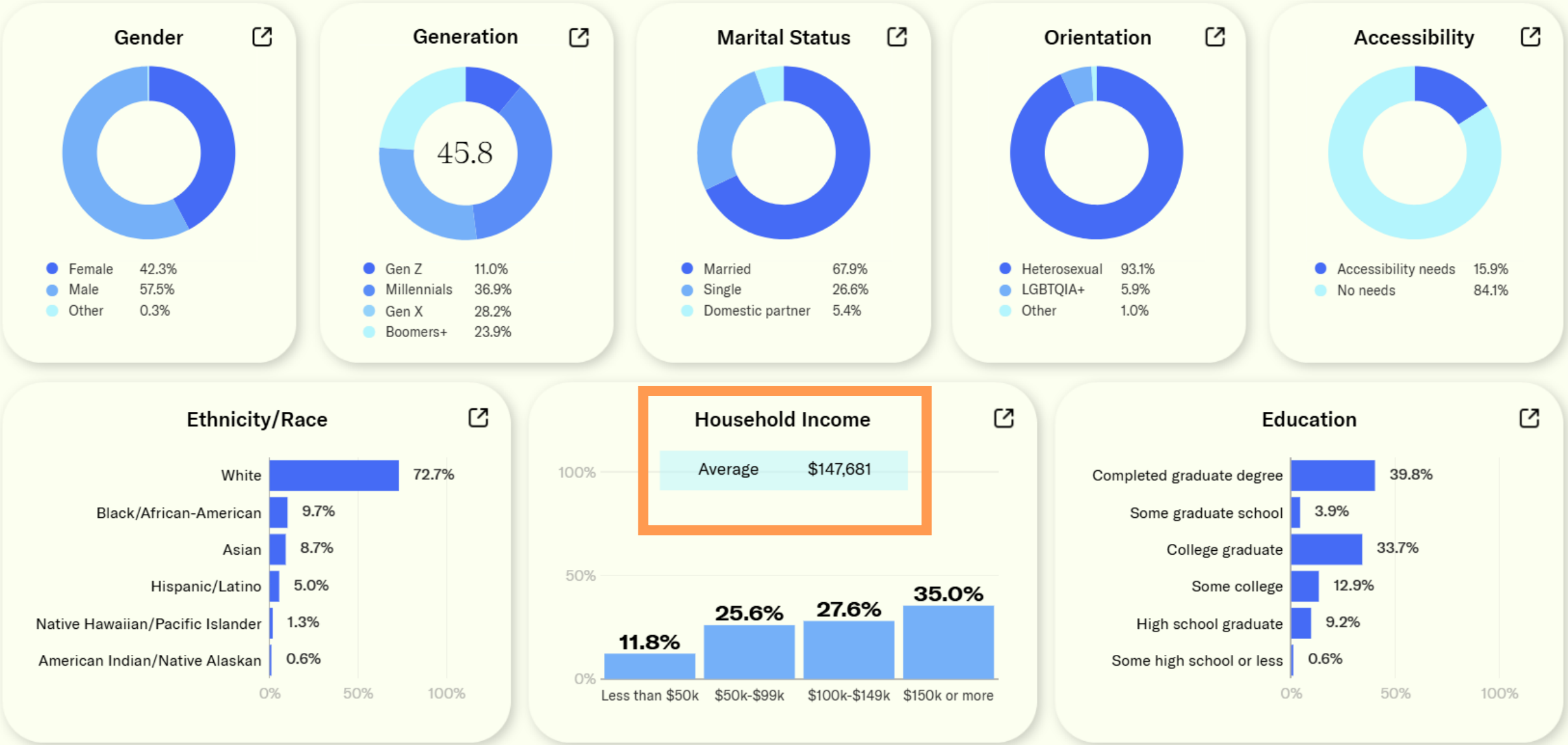
States

Filters

Hawaii

(All)

Recent Visitors



Origin Markets

Recent Visitors to Hawaii (Past 12 Months)

Year

2025 YTD 

Curated Collections

States 

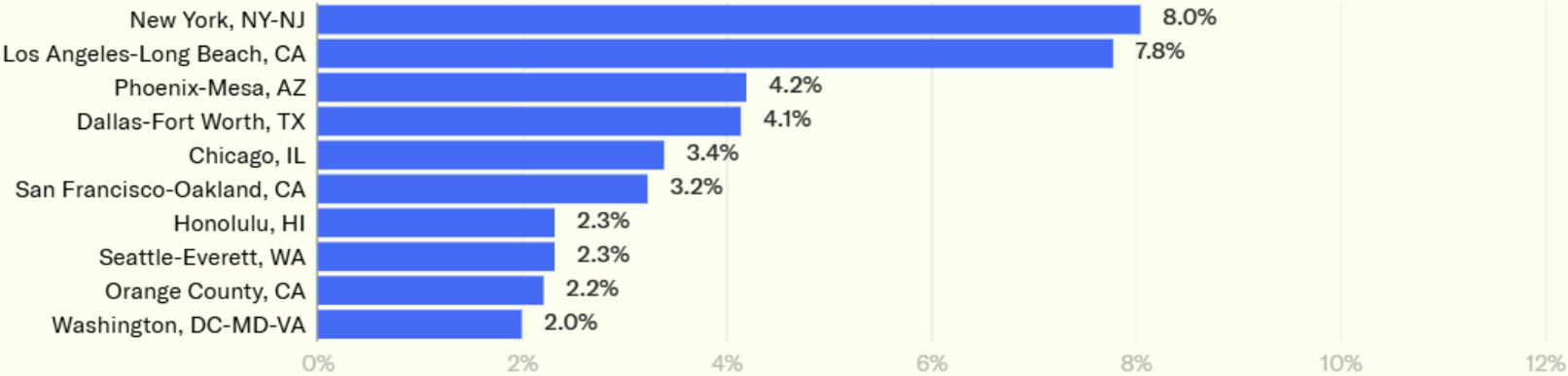
Filters

Hawaii 

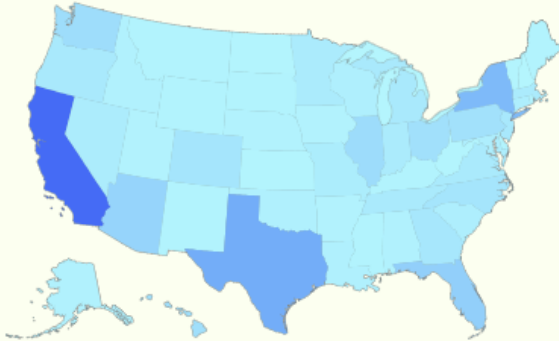
(All) 

Recent Visitors 

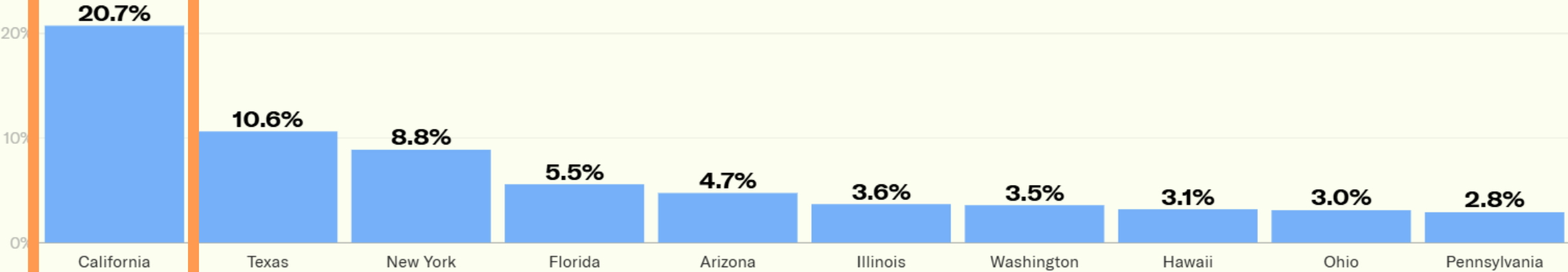
Top Origin Metros



Origin Map



Top Origin States



Travel Behaviors

Recent Visitors to Hawaii (Past 12 Months)

Year

2025 YTD 

Curated Collections

States 

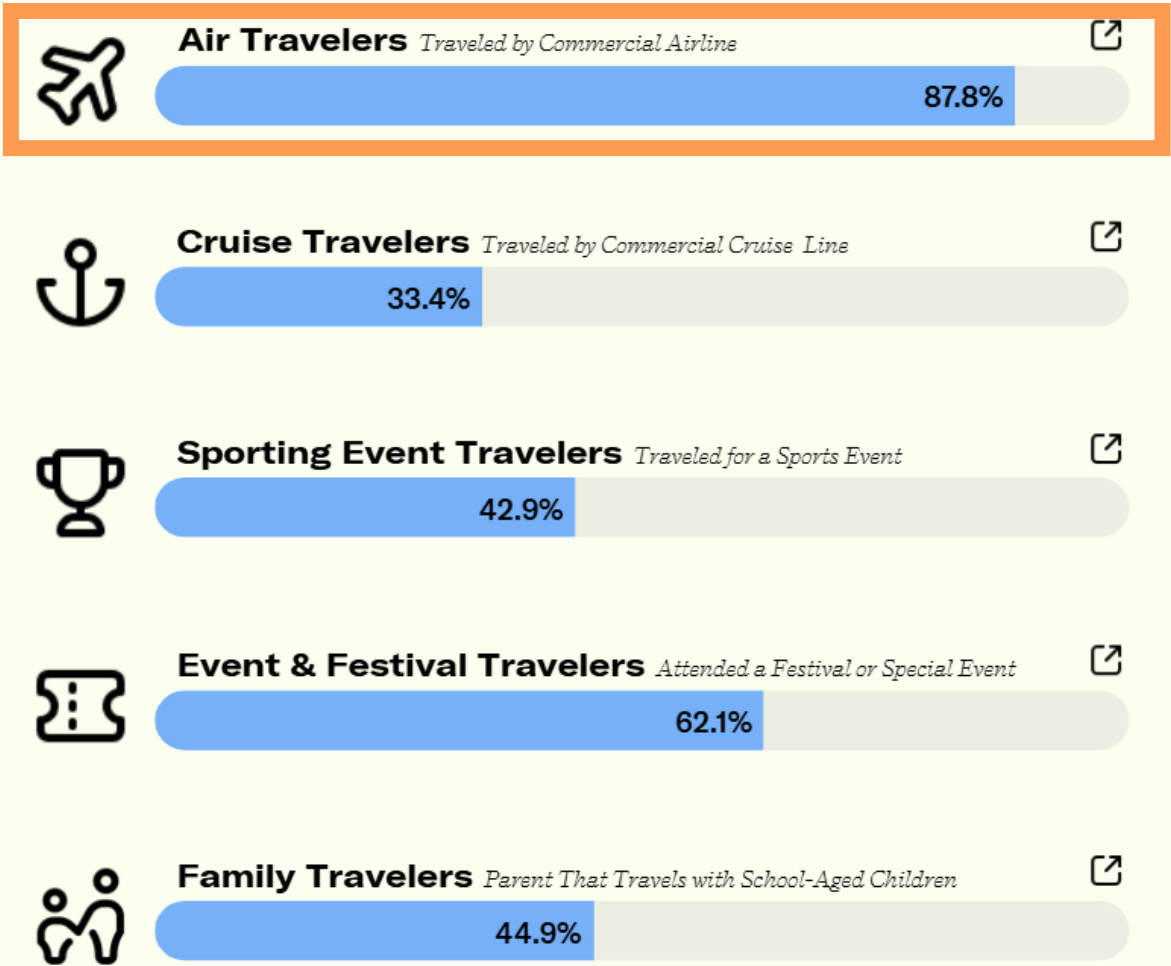
Filters

Hawaii 

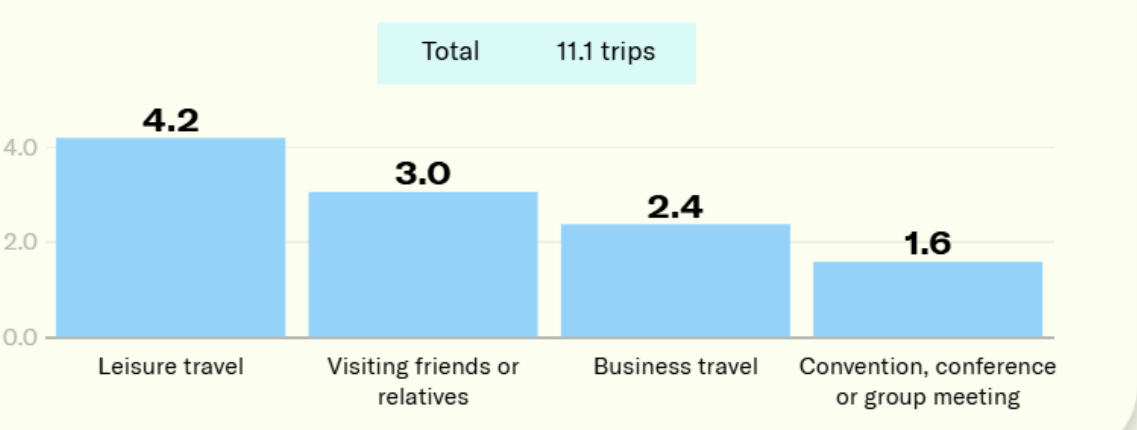
(All) 

Recent Visitors 

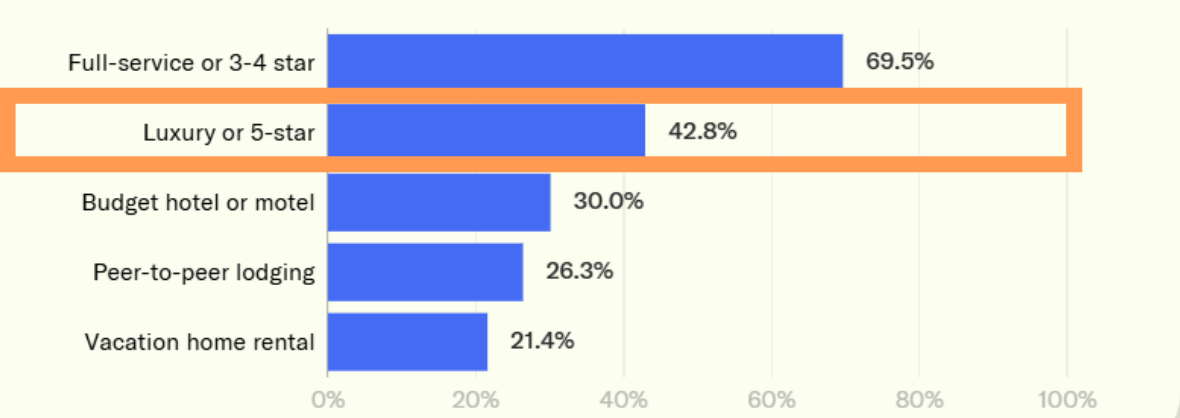
Traveler Segments (Past 12 Months)



Trips Taken in the Past Two Years (Average per Trip Type)



Paid Accommodations (Overnight Stay in the Past Two Years)



Travel Sentiment

Recent Visitors to Hawaii (Past 12 Months)

Year

2025 YTD 

Curated Collections

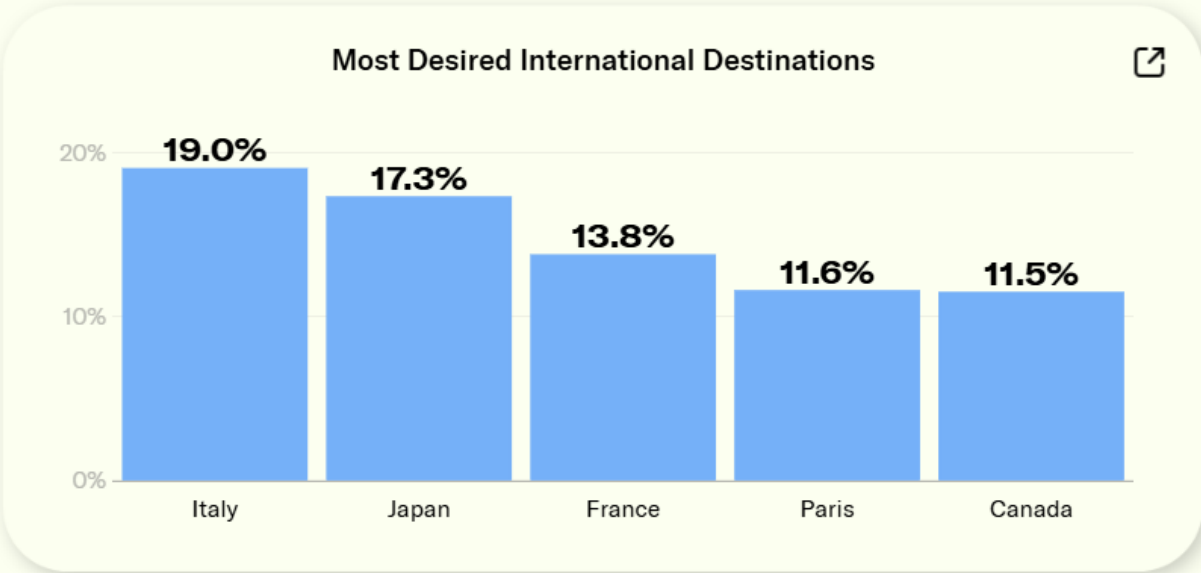
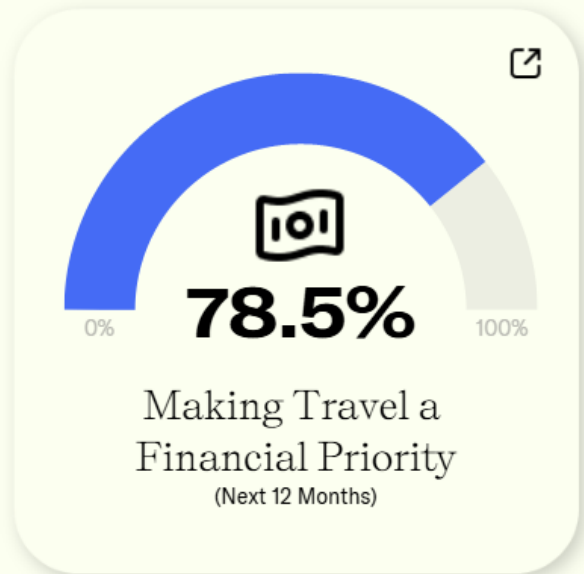
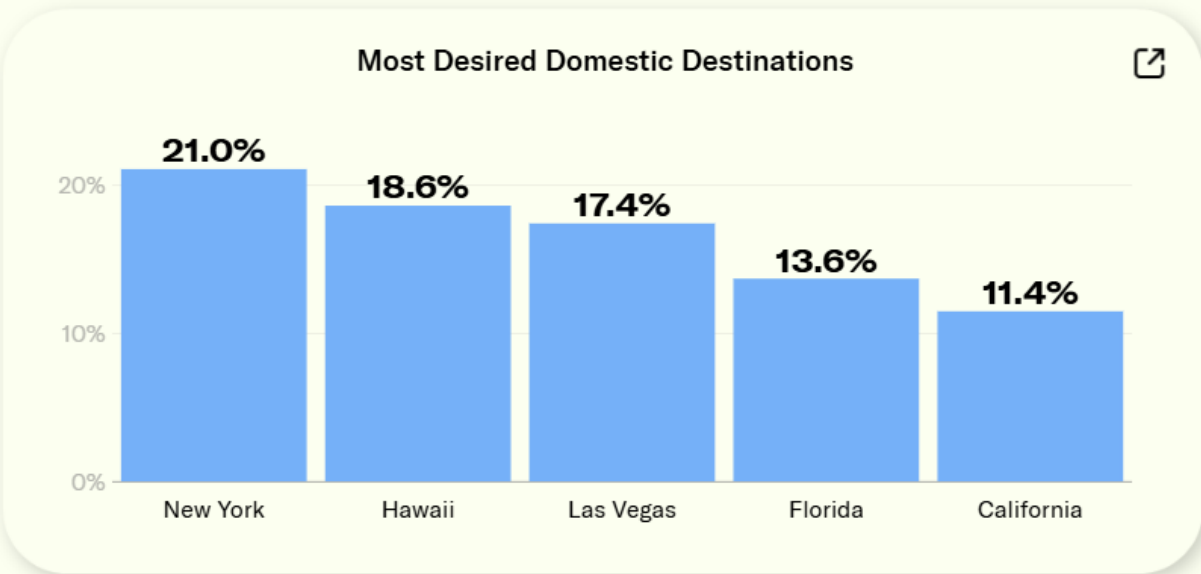
States 

Filters

Hawaii 

(All) 

Recent Visitors 



Travel Inspiration Resources

Likely Visitors to Hawaii (Next 12 Months)

Curated Collections

States

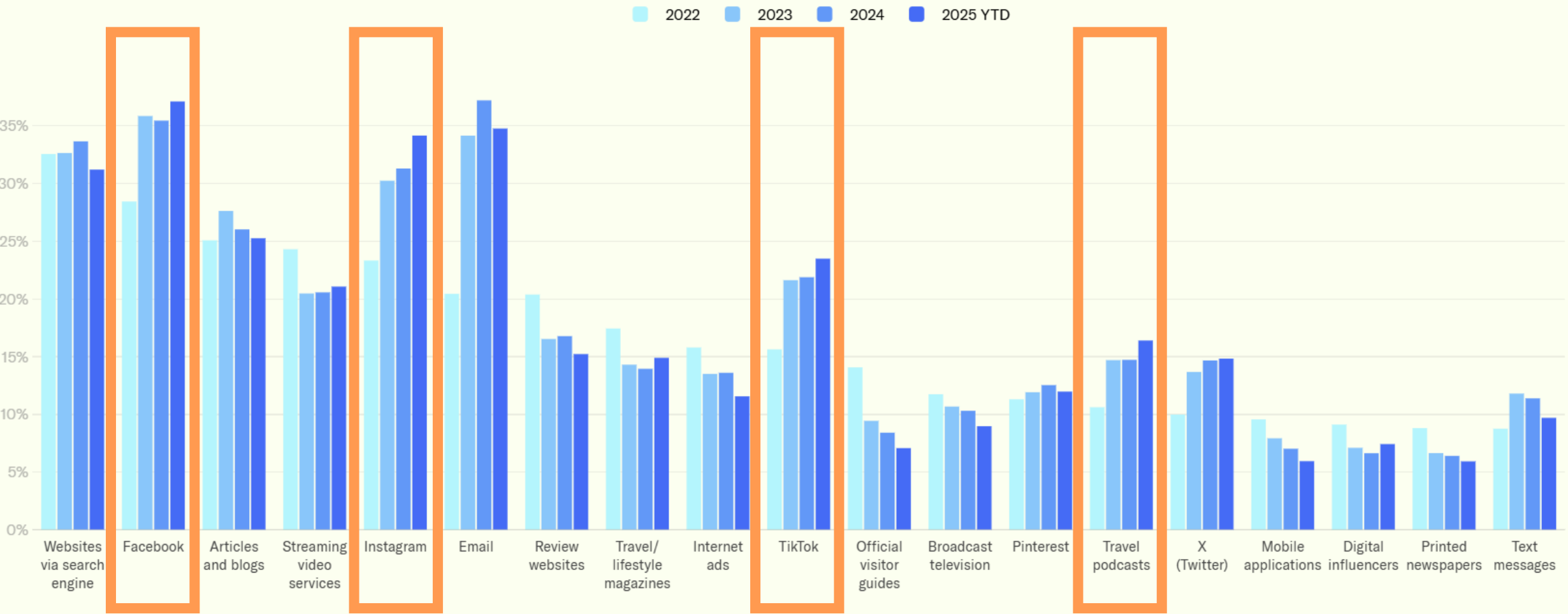
Filters

Hawaii

(All)

Likely Visitors

Most Effective Travel Inspiration Resources by Year



Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

Social Media Platforms in Travel Planning

Likely Visitors to Hawaii (Next 12 Months)

Curated Collections

States

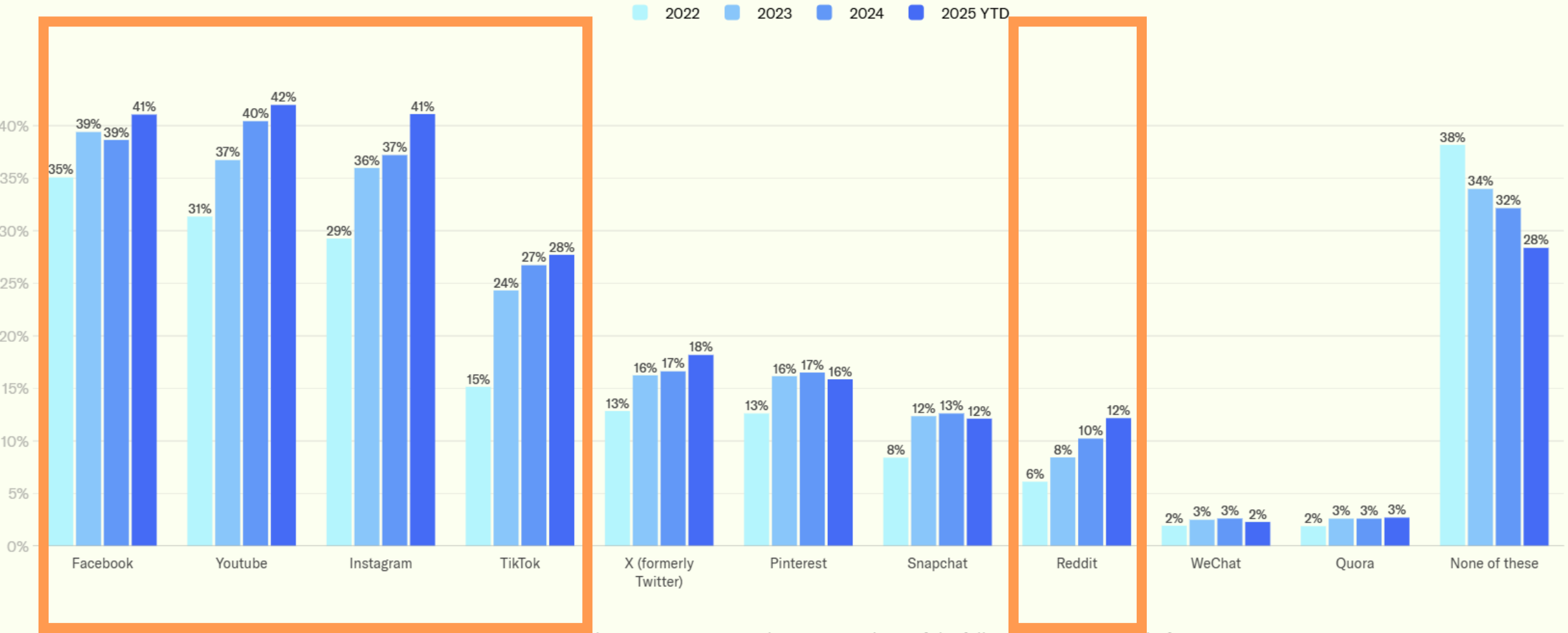
Filters

Hawaii

(All)

Likely Visitors

Social Media Platforms Used for Travel Planning in the Past 12 Months



Question: In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS?
(Select all that apply)

Brand Equity Index Summary

Future Partners Destination Brand Equity Index is made up of the following **six key elements**, which are considered as the important components of a brand's equity. These factors are then utilized to calculate a destination's index score on a 100-pt scale.

Year

2025 YTD

Destination Type

States

Destination

Hawaii

Competitive Set

(All)

Awareness
The extent to which travelers are familiar with a destination as a viable place to visit.

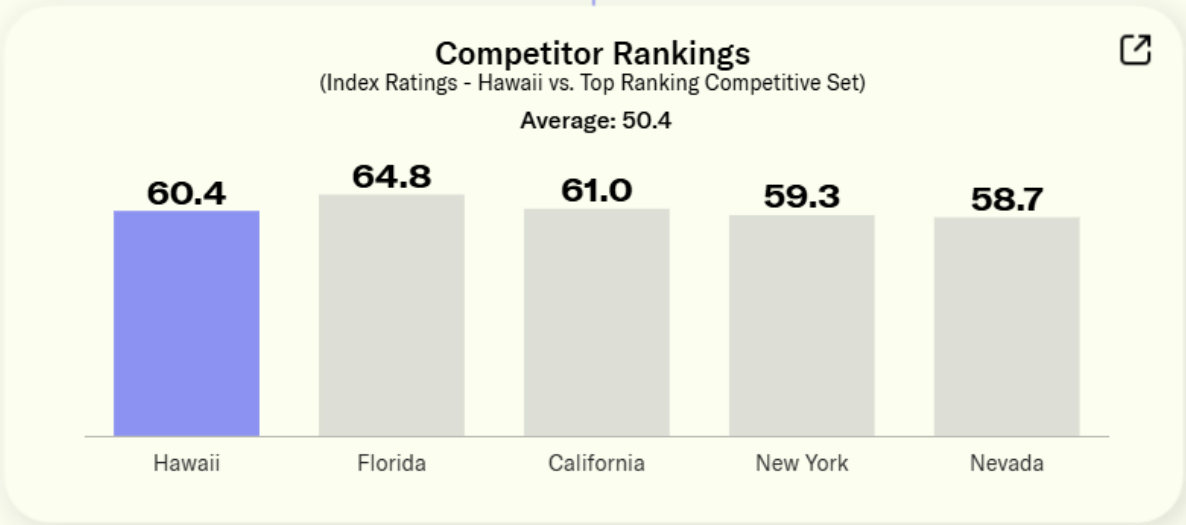
Reputation
The overall appeal and perceived quality of the destination among travelers.

Differentiation
How unique and distinct the destination's visitation experience is compared to others.

Energy/Momentum
The perception of how much the destination's popularity has increased/decreased recently.

Relevance
The likelihood that a consumer will consider visiting the destination in the next few years.

Loyalty
The degree to which consumers have visited the destination in the past.



*Barometer values indicate how each destination performs relative to the selected competitive set, with 50 representing average performance.

Destination Attributes - Destination vs. Competitive Set

Year

2025 YTD

Destination Type

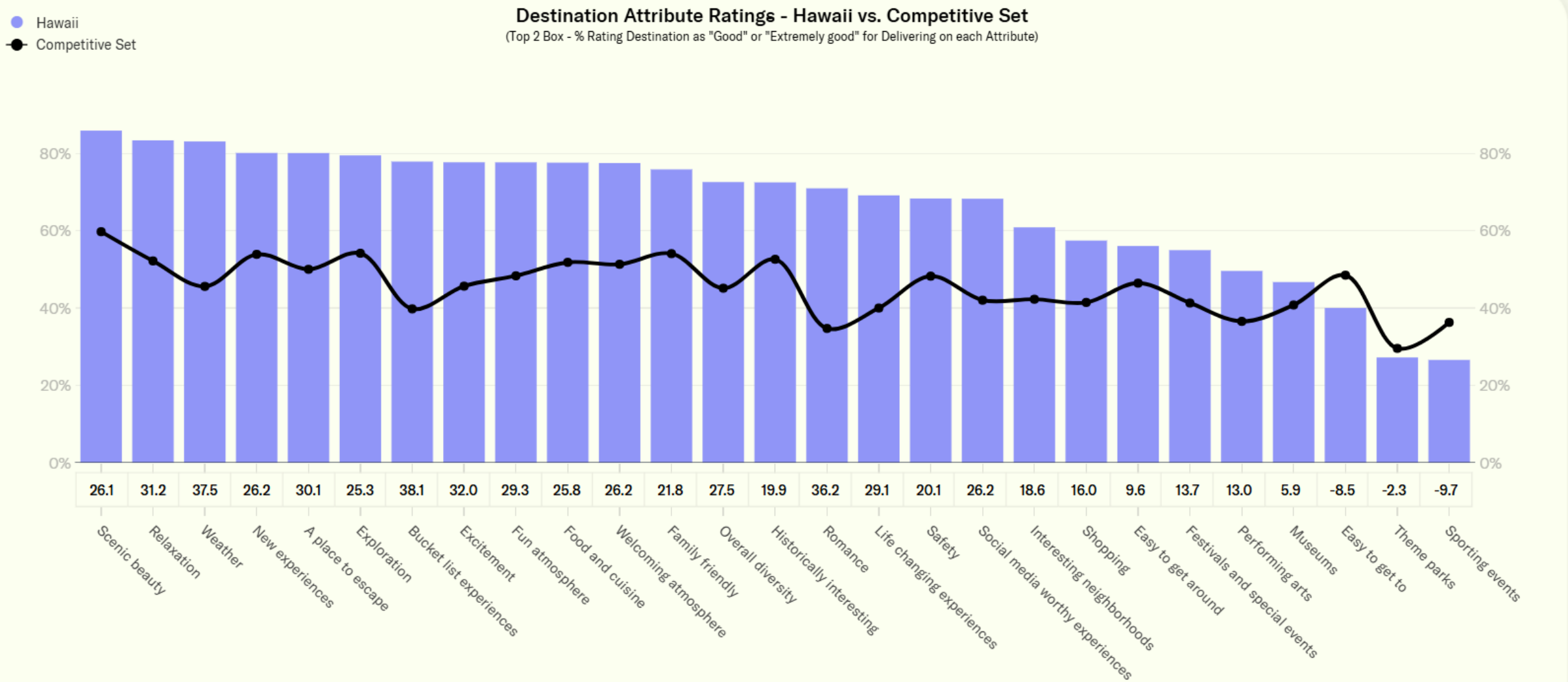
States

Destination

Hawaii

Competitive Set

(All)



Destination Deterrents - Destination vs. Competitive Set

Year

2025 YTD

Destination Type

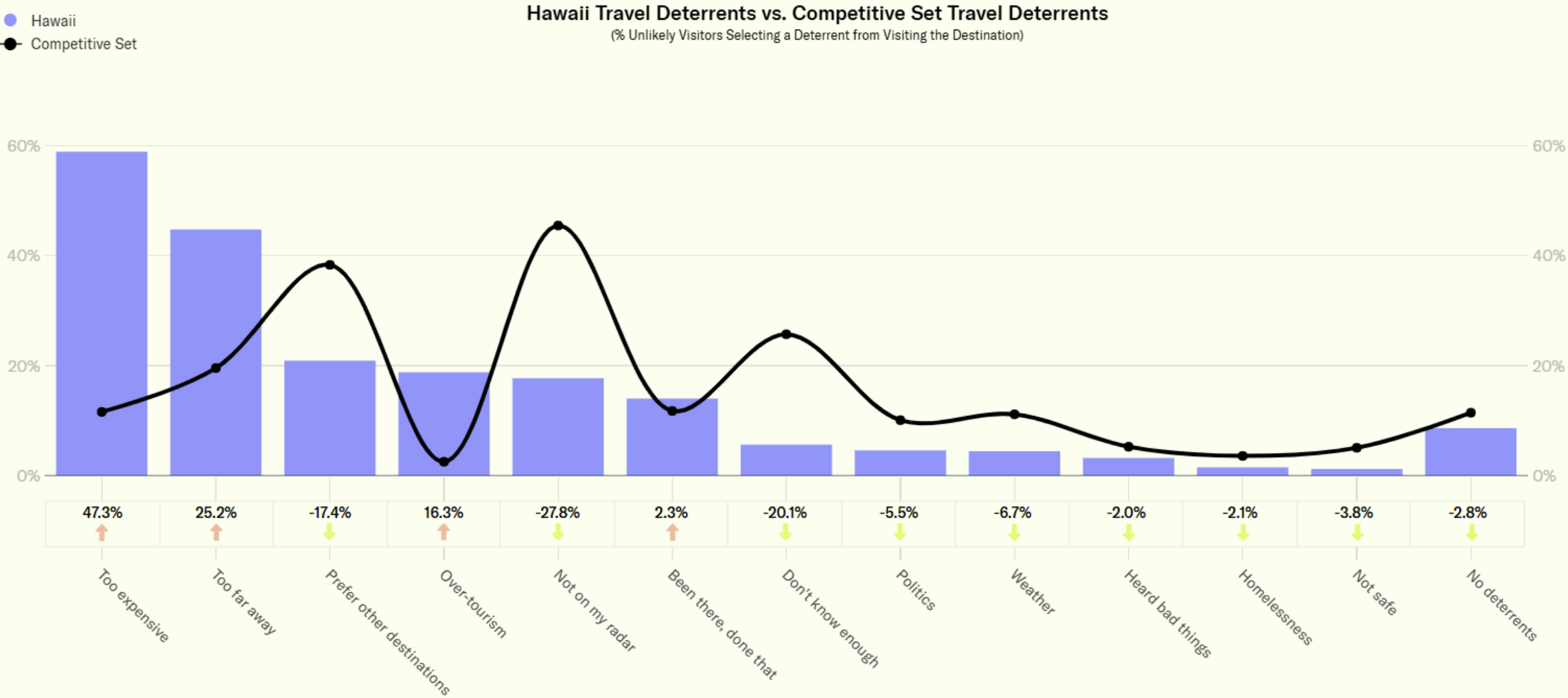
States

Destination

Hawaii

Competitive Set

(All)



*Arrows indicate how selected destination compares to the selected competitive set.

Traveler Tech Trends

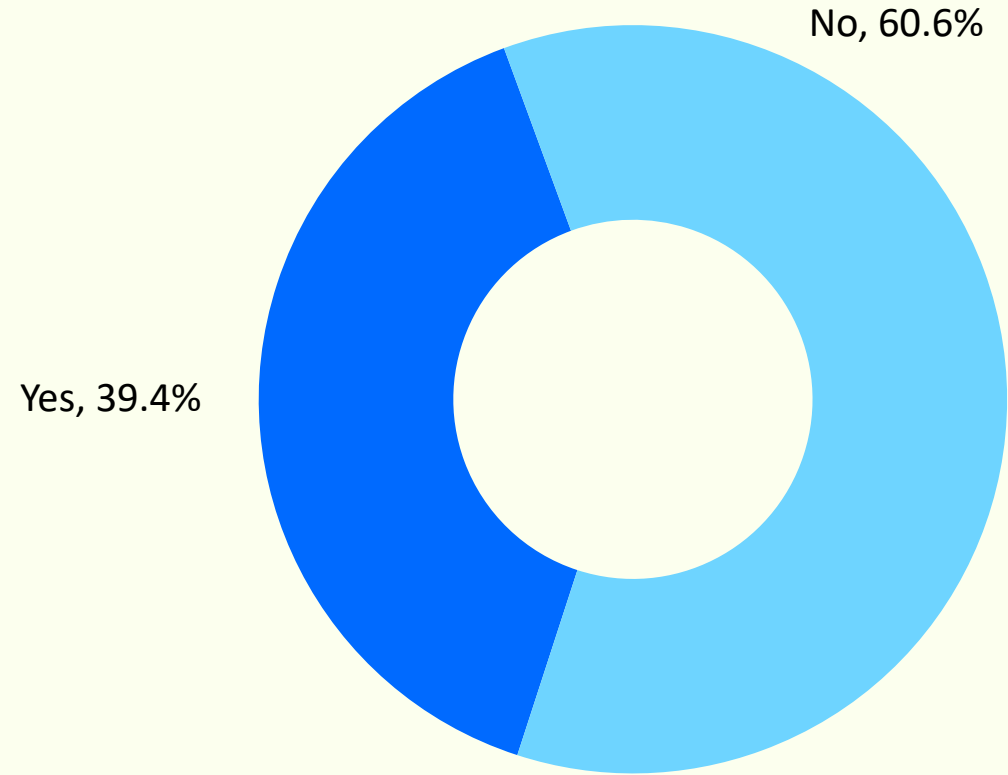
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4-in-10 travelers use offline resources to plan their travels

Question:

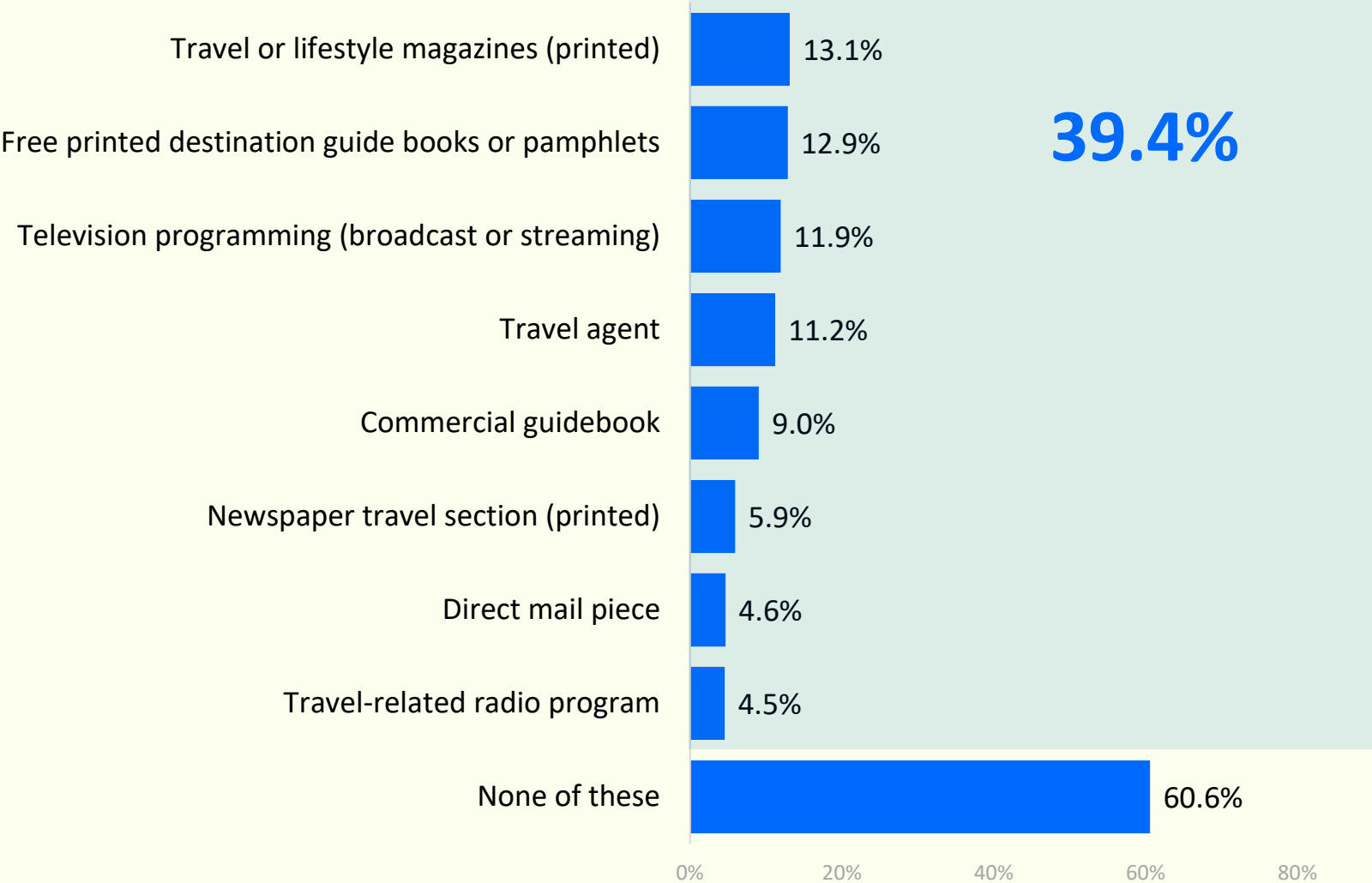
In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply) PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION]



Travel magazines are the leading offline source of planning information.

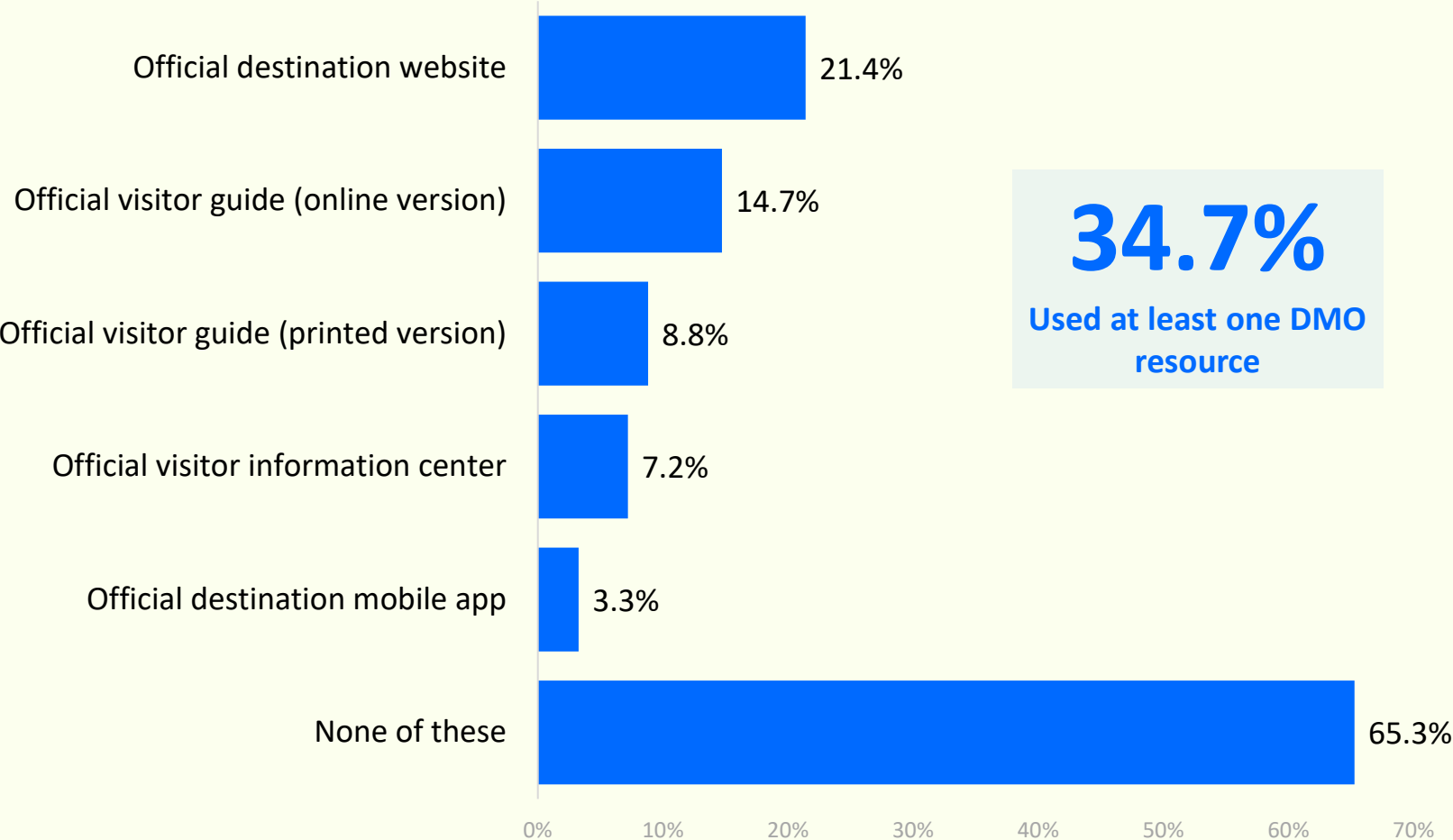
Question: In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply)

PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION



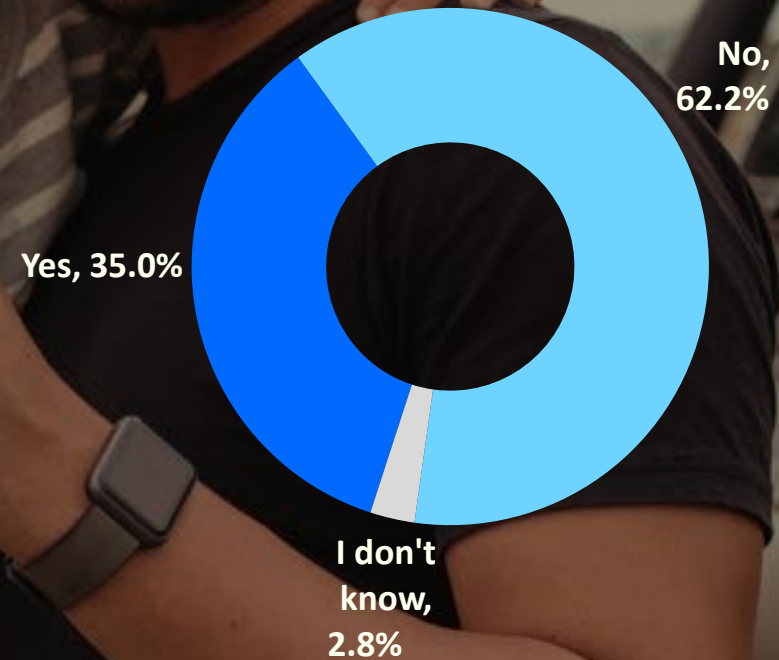
DMOs are used by about 1-in-3 travelers, with their websites leading the way.

Question: In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel? If so, which resources did you use?



Online Video

Used Online Video for Travel Planning
(past 12 months)

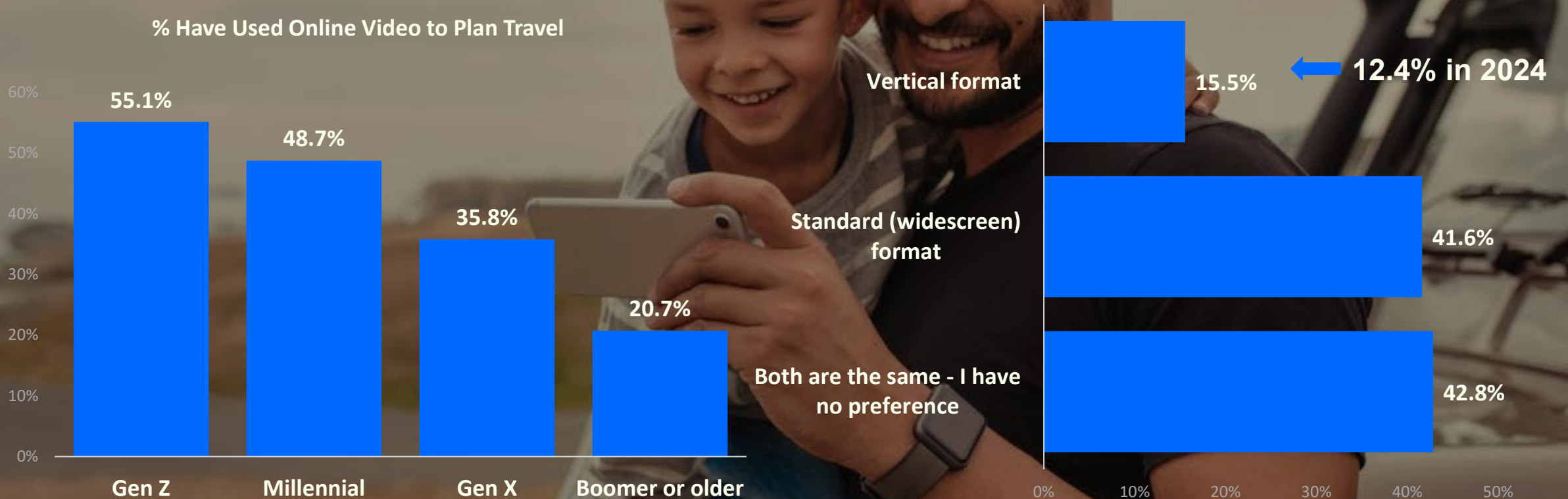


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Online Video

% Have Used Online Video to Plan Travel

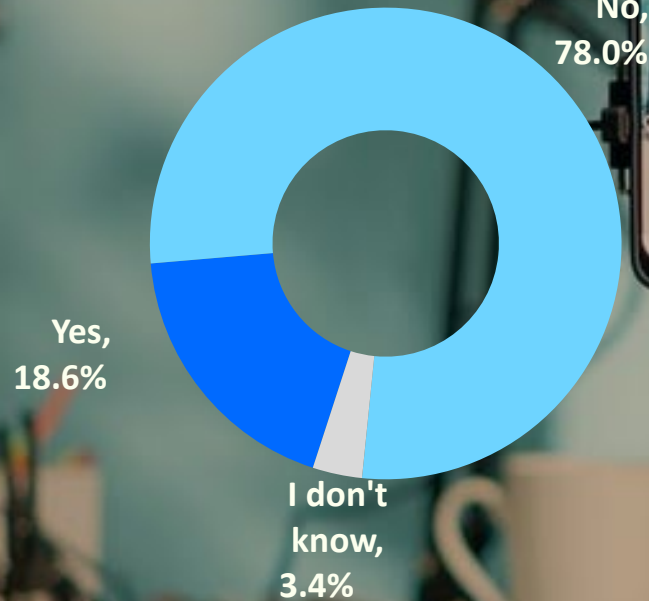


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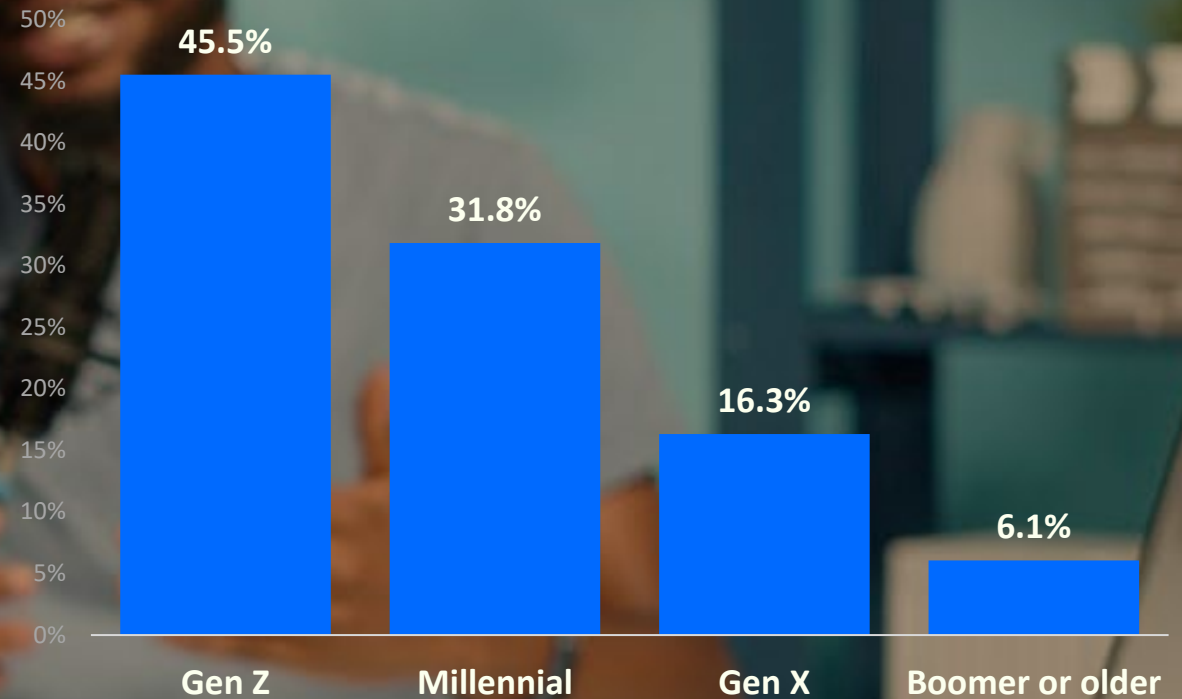


Digital Influencers

Used a Digital Influencer to Plan Travel
(past 12 months)



By Generation

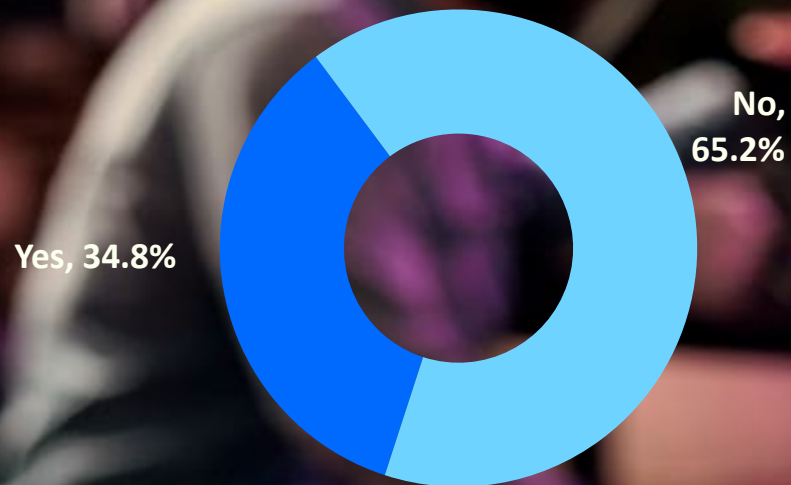


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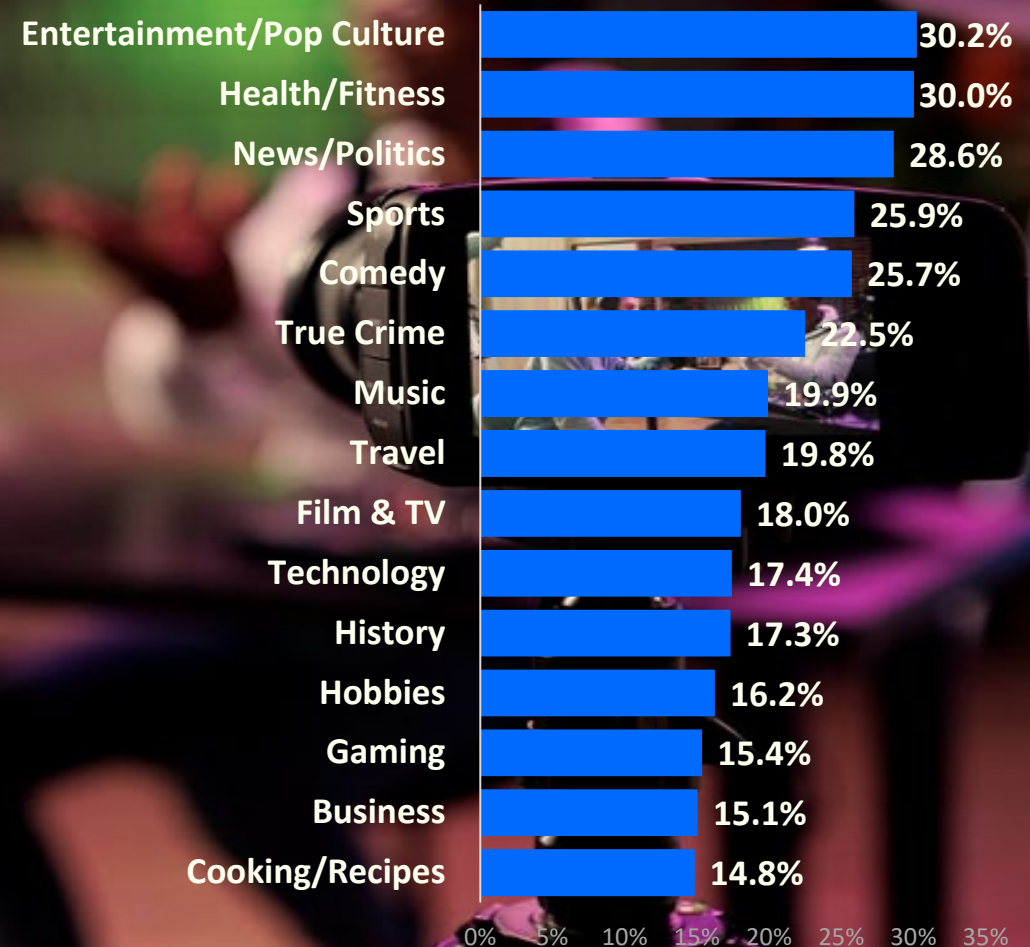
Podcasts

Listen to Podcasts Regularly



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Top Podcast Genres

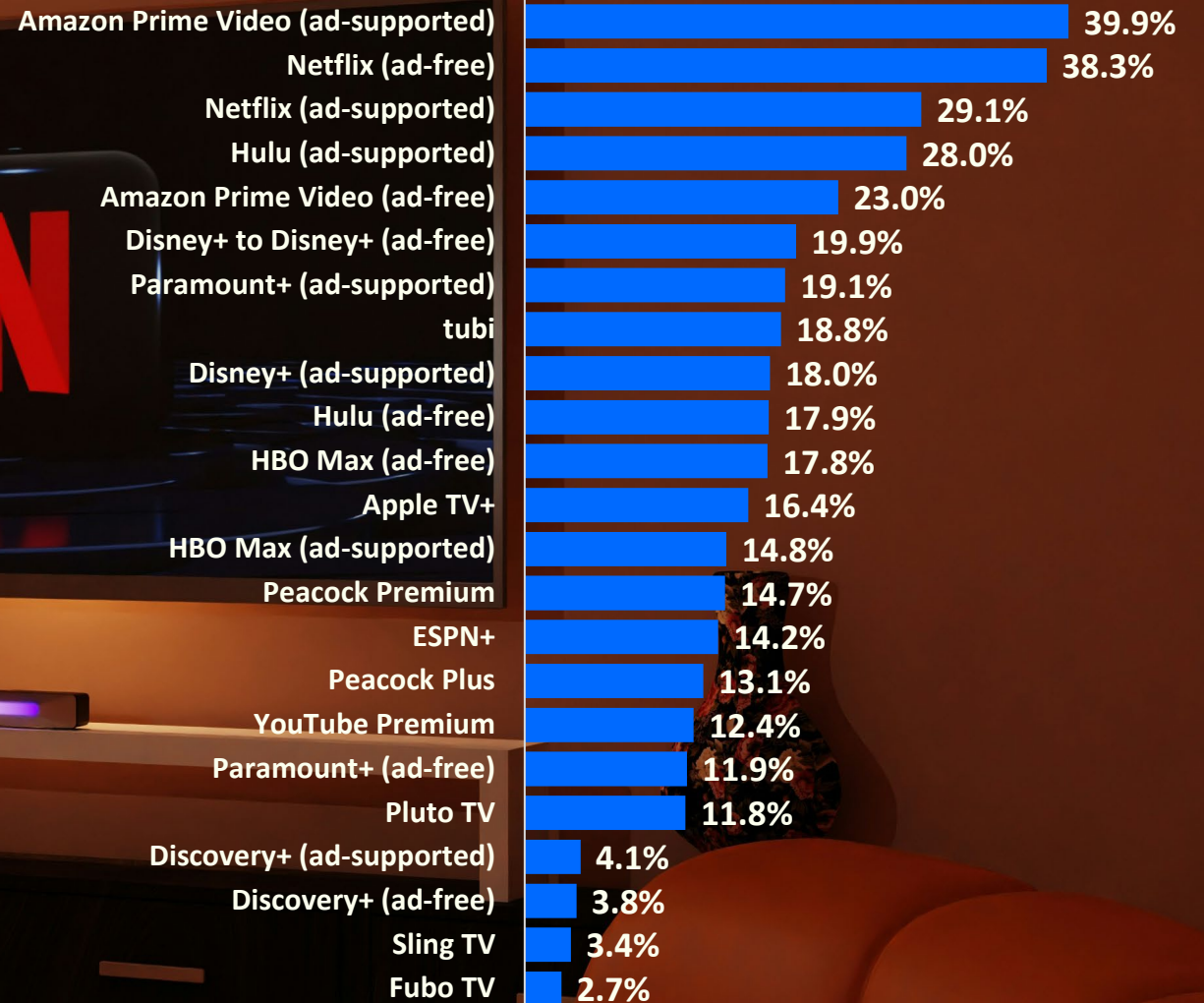
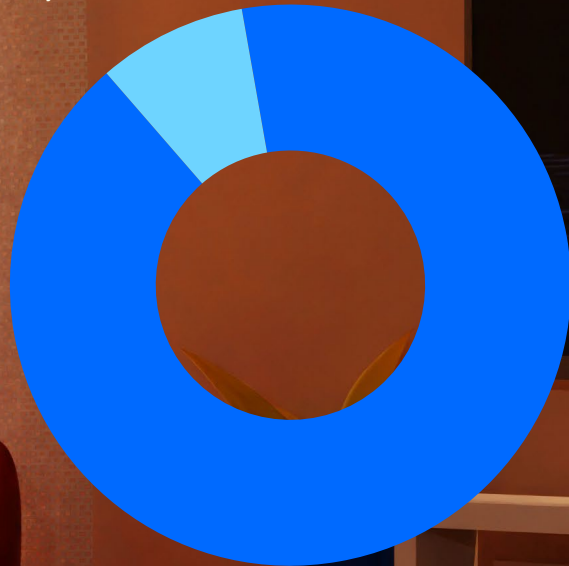


Streaming Services

% Regularly Watch Any Streaming Service

No, 8.6%

Yes, 91.4%



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0% 20% 40%



A woman with long, wavy hair is wearing a white VR headset. She is holding a glowing, translucent globe with her hands, which is surrounded by faint, glowing lines and geometric shapes, suggesting a virtual environment. The background is dark and blue.

Virtual & Augmented Reality

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VIRTUAL REALITY HEADSETS

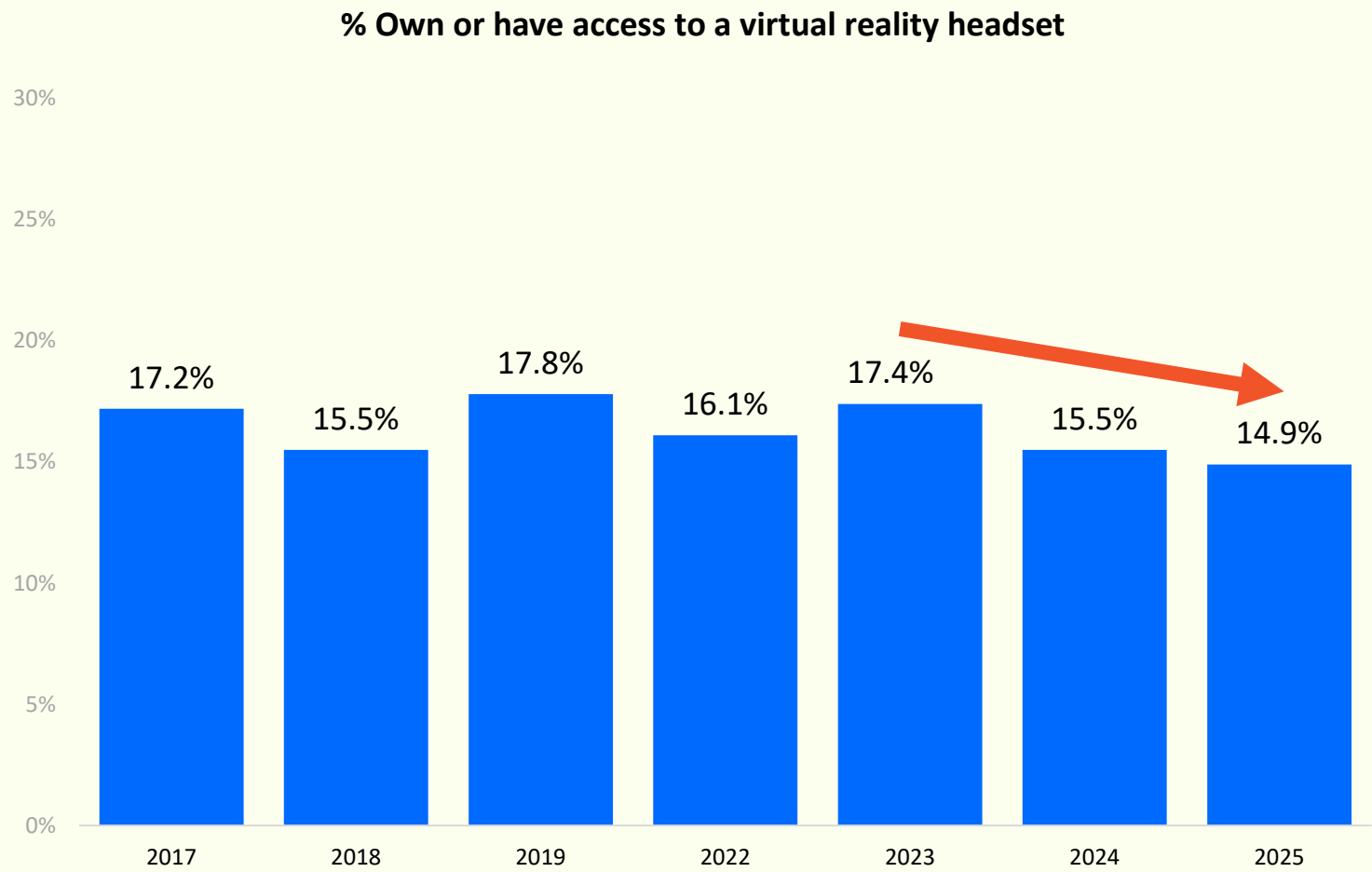
14.9%

of travelers say they have
access to a *virtual reality*
headset.



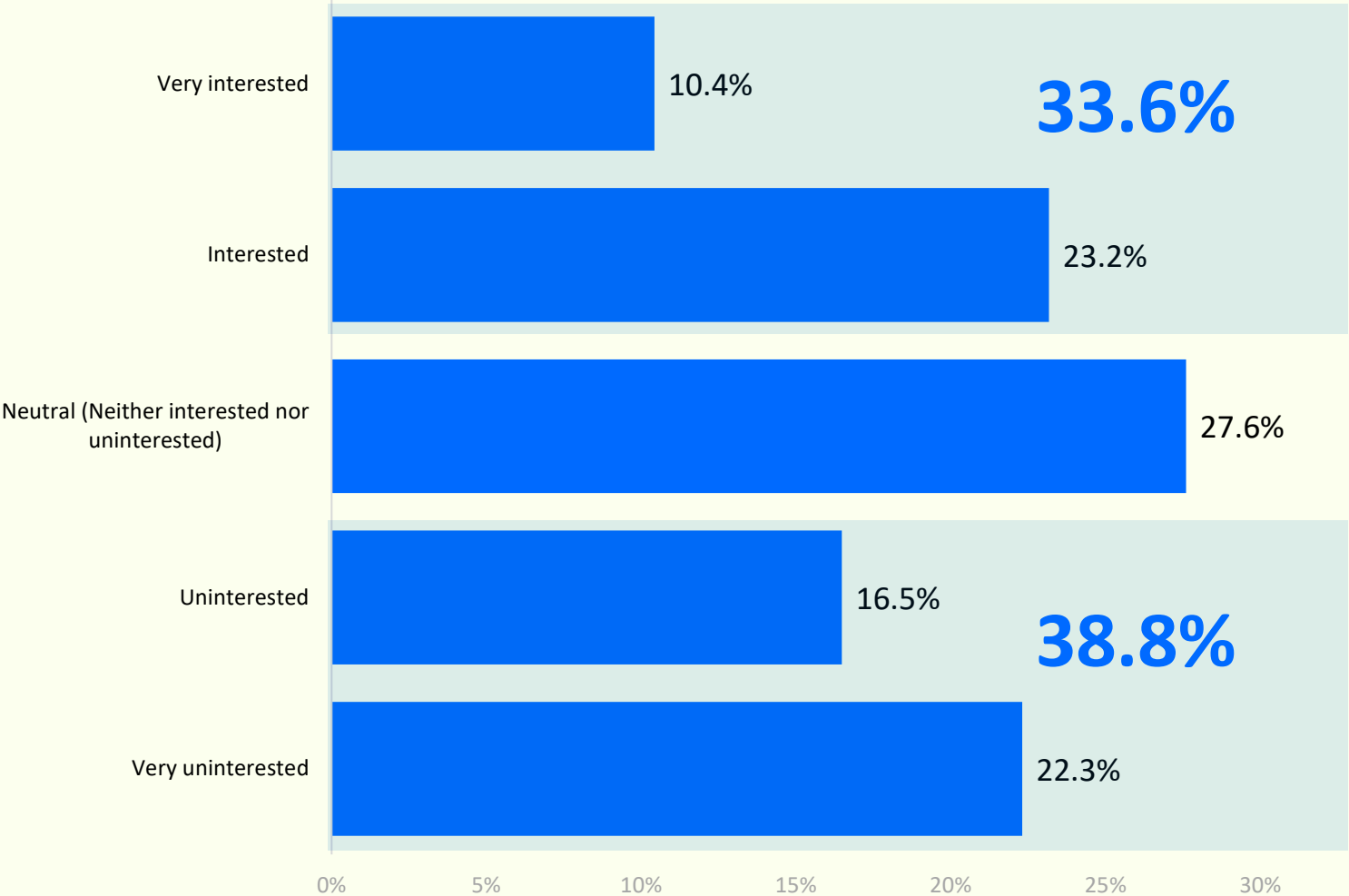
Virtual reality headsets have not seen significant adoption over the past eight years.

Question:
Do you currently own (or have access to use) a virtual reality headset?



One in three are interested in using VR headsets to research leisure destinations.

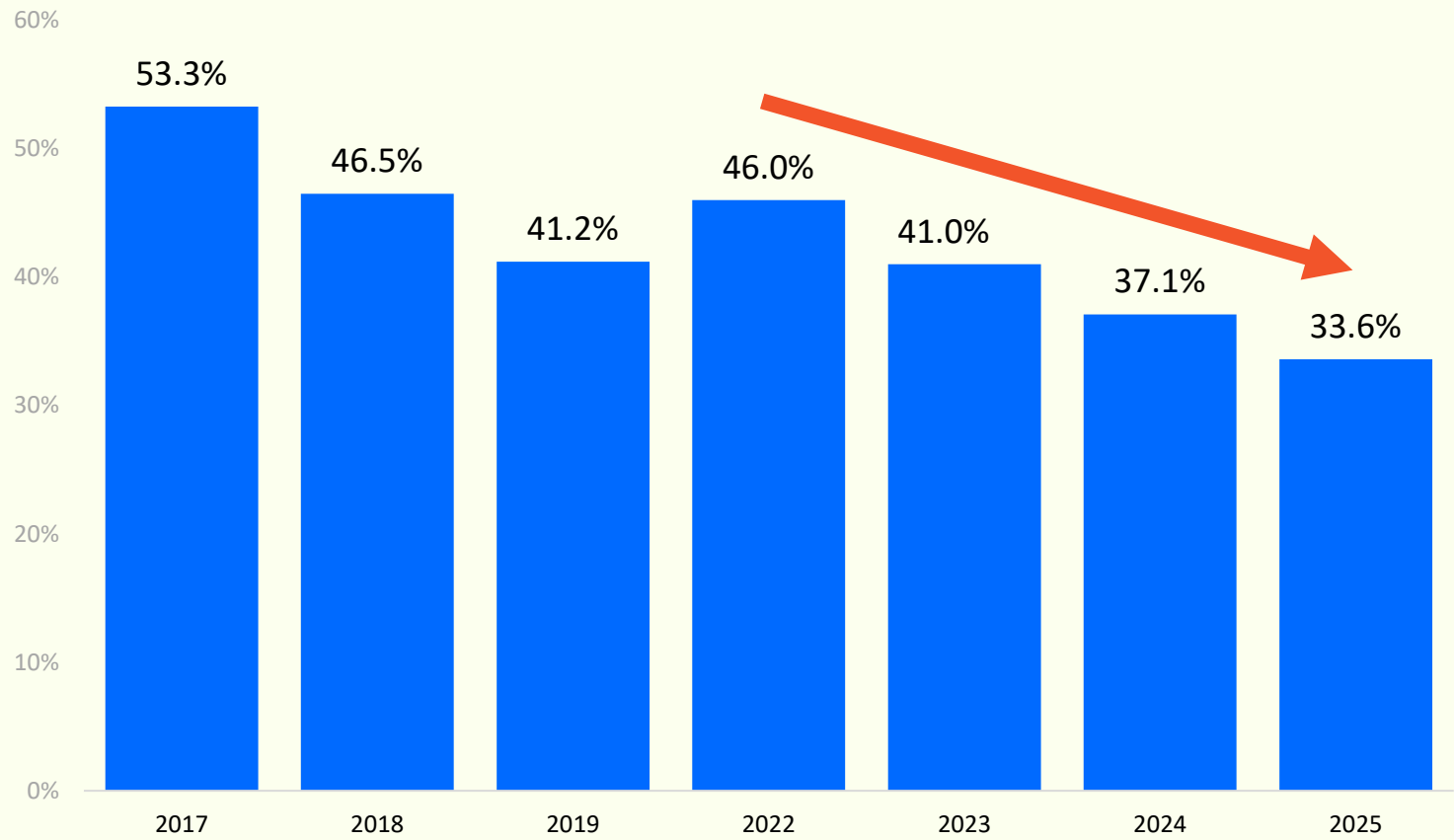
Question:
If good contents were available, how interested would you be in using a Virtual Reality Headset to research leisure destinations you are considering visiting?



Interest in using VR headsets to research leisure destinations has been declining over the past three years.

Question:

If good contents were available, how interested would you be in using a Virtual Reality Headset to research leisure destinations you are considering visiting?



Artificial Intelligence



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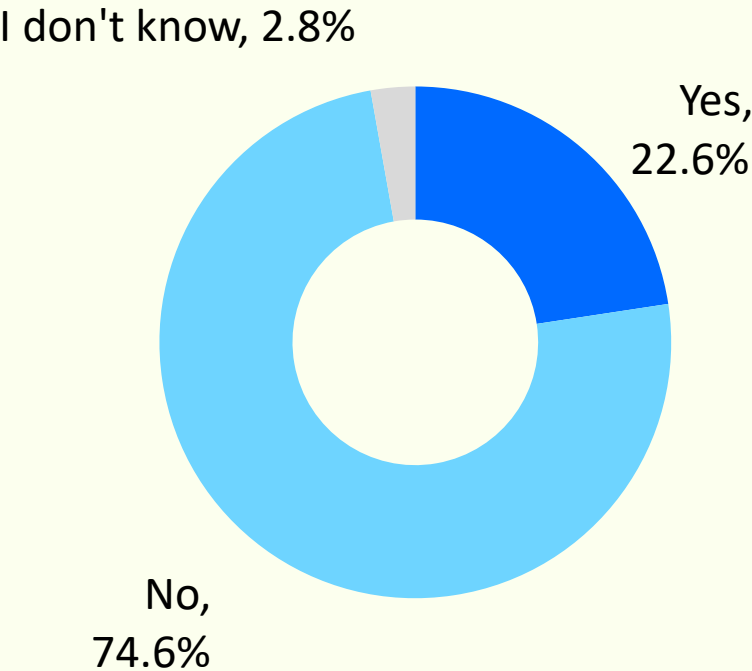


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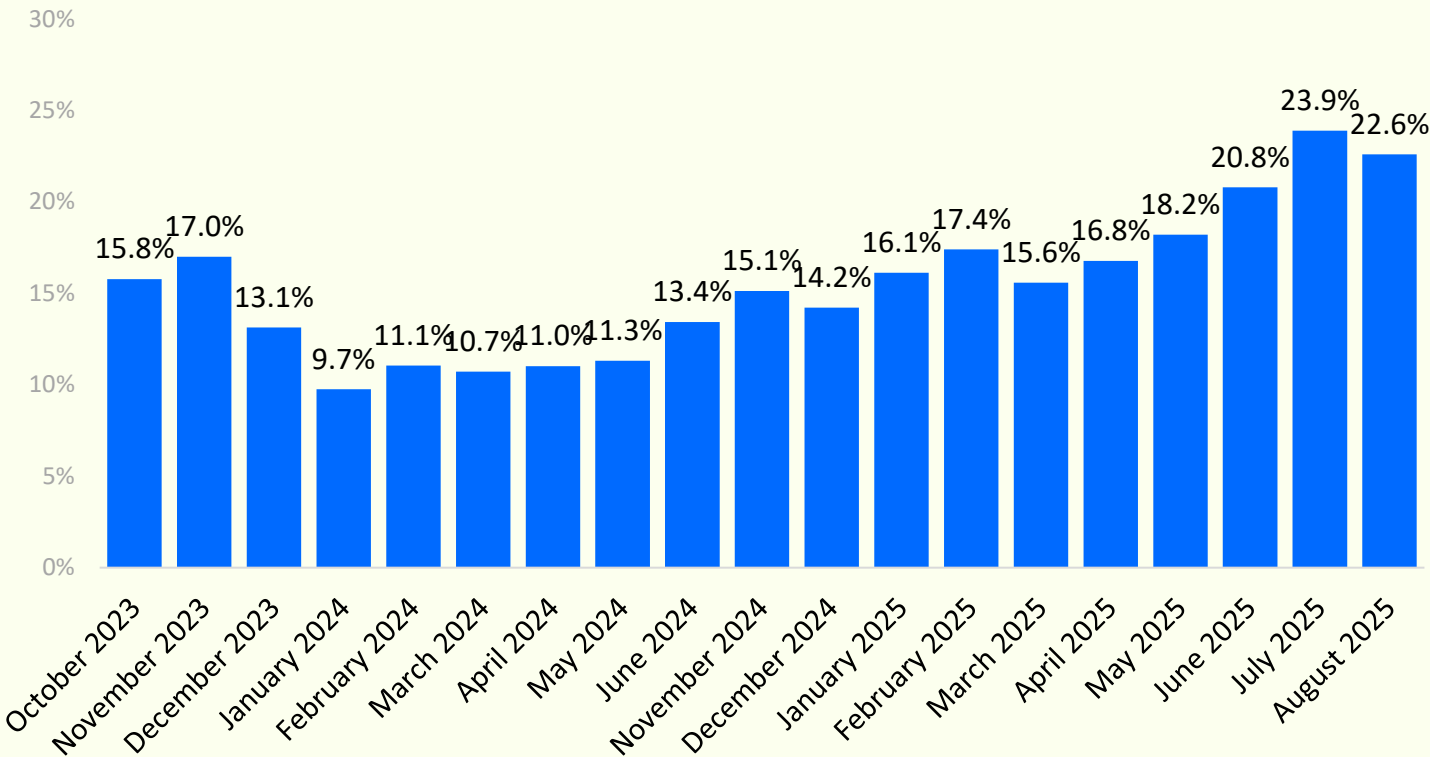
We Asked Travelers...

Traveler Use of AI-based tools for Travel Planning

Artificial Intelligence Tool Usage
(Travel planning - Past 12 months)



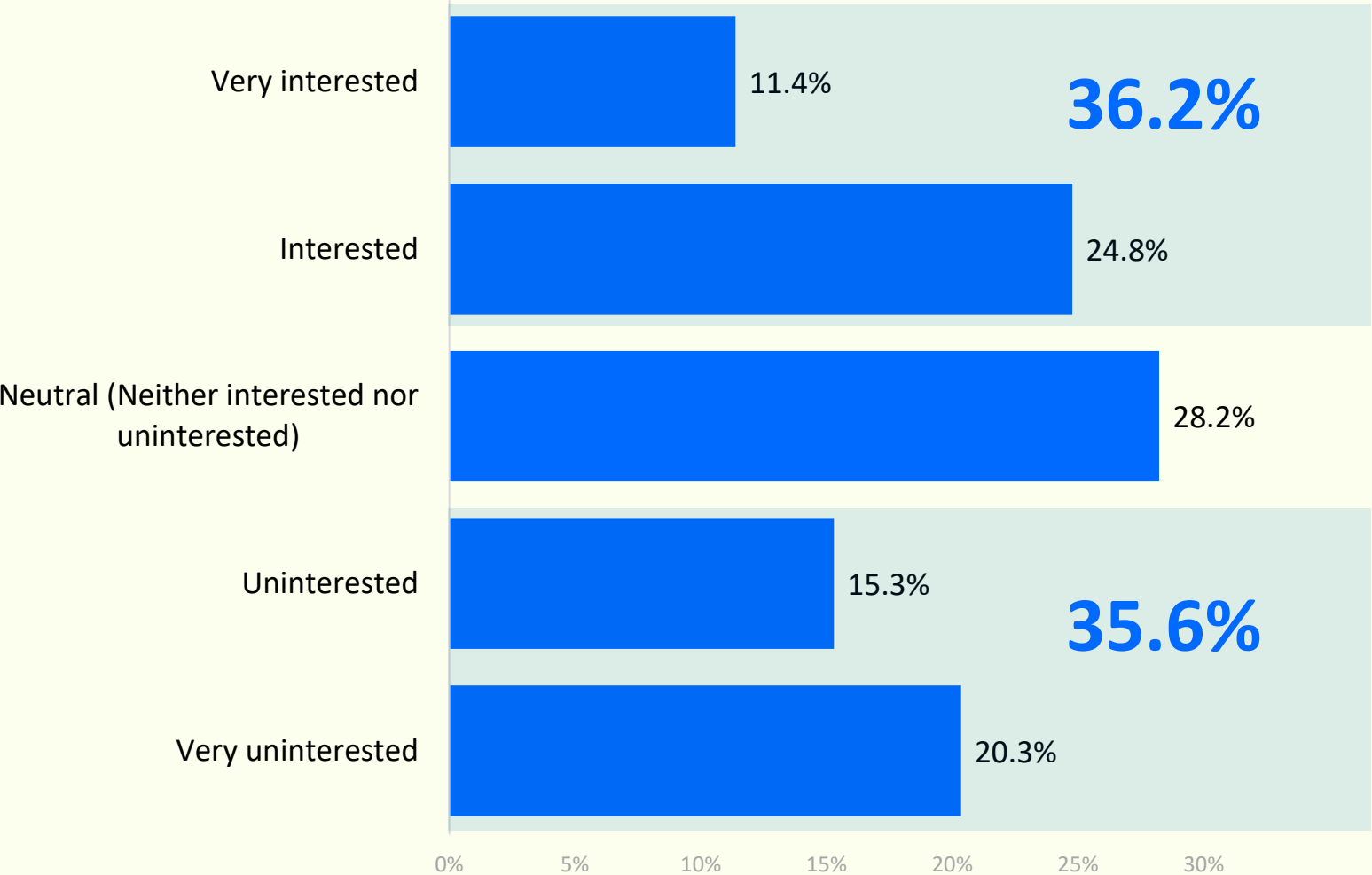
Historical Trends



Interest in using AI for travel planning is split.

Question:

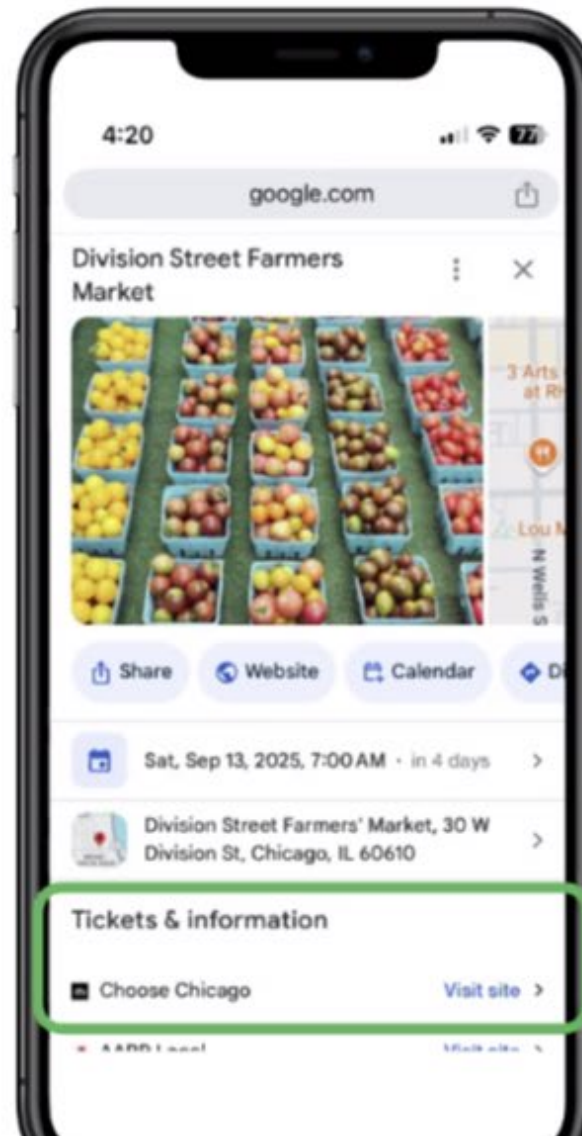
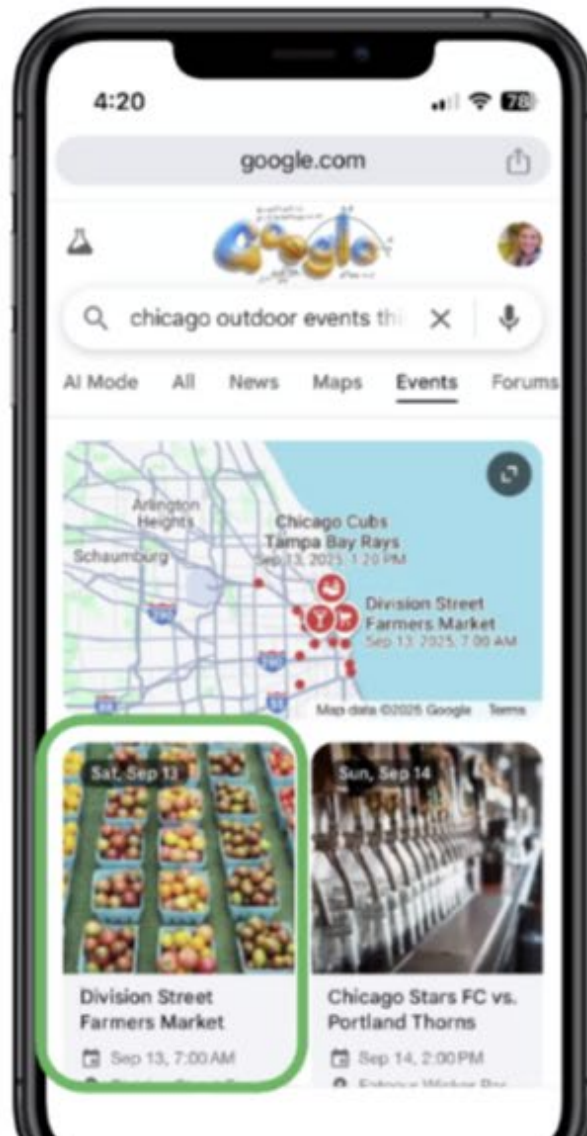
How interested would you be in using Artificial Intelligence (AI) technologies for travel inspiration and/or trip planning?





Live experience on AI-organized Search results

Note these experiences will continue to evolve over time





SEO

Three things to do for AI search experiences

The way people discover your content continues to evolve, but our core goal remains the same:
help people find outstanding, original content that adds unique value.

1 Focus on unique, valuable content for people

Meet users' preferences in today's multimodal search environment, supporting your text content with high-quality short form videos and images.

2 Ensure we can access your content

Prioritize content-rich pages for indexing and crawling, and ensure structured data is always supported by visible content.

3 Understand the full value of your visits

Focus on how well users get information or finish tasks, not just on clicks.



Events Schema Markup

<https://developers.google.com/search/docs/appearance/structured-data/event#add-structured-data>

Google Search Central

Documentation

Support

Blog

What's new

Events

Case studies

Search

Language

Introduction

Search Essentials

SEO fundamentals

Crawling and indexing

Ranking and search appearance

Overview

AI features

Byline dates

Favicons

Featured snippets

Flexible Sampling

Google Discover

Images

Local features

Page experience

Ranking systems

Ranking updates

Site names

Sitelinks

Snippets

Structured data

Understand how structured data works

Structured data general guidelines

Enriched search results

Generate structured data with JavaScript

Feature guides

All structured data features

Article

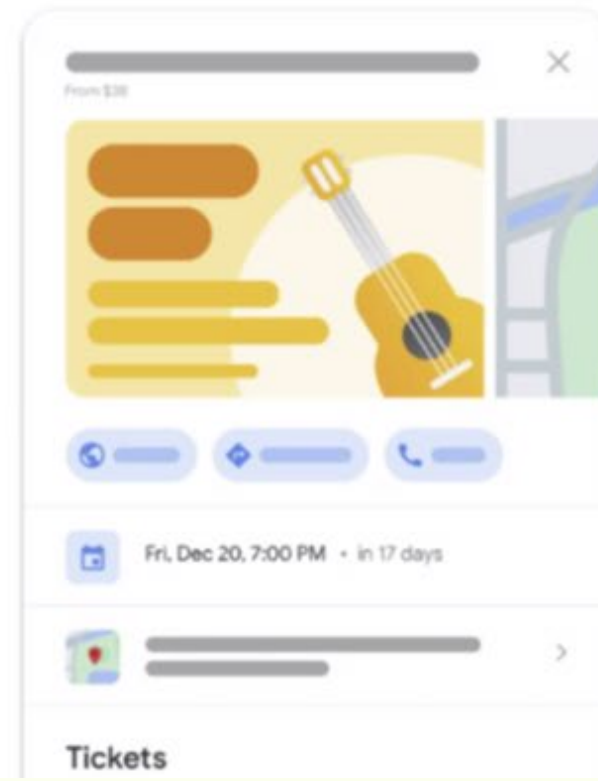
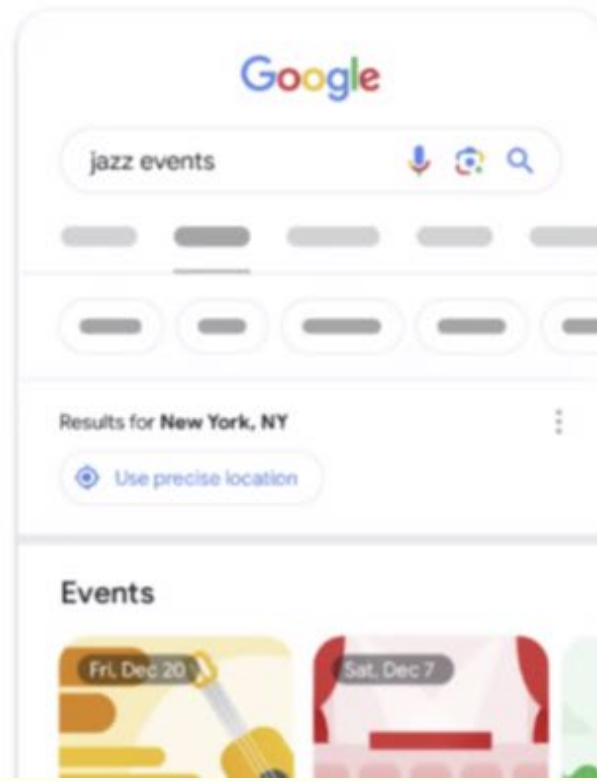
Book outlines

Event (Event) structured data

Send feedback

The event experience on Google makes it easier for people to discover and attend events through Google Search results and other Google products, like Google Maps. This feature brings many benefits:

- **More interactive results:** Your events can be eligible to be displayed in the event experience on Google, featuring your logo, description of the event, and more.
- **Increased chances of discovery and conversion:** People have a new way to interact with your event posting and click through to your site. Learn how [Eventbrite saw a 100% increase](#) in the typical year-over-year growth of traffic from Google Search.



On this page

[How to add structured data](#)

Examples

[Standard event](#)

[Event with an updated status](#)

[Region and language availability](#)

Guidelines

[Technical guidelines](#)

[Content guidelines](#)

[Date and time guidelines](#)

[Structured data type definitions](#)

[Monitor rich results with Search Console](#)

[After deploying structured data for the first time](#)

[After releasing new templates or updating your site](#)

[Analyzing traffic periodically](#)

Troubleshooting

[Event location is missing or incorrect](#)

[My site isn't showing up as an option for purchase](#)

[Time or date is incorrect](#)

Insights Explorer

Future Partners

Updated with October 2024



The State of the American Traveler

Welcome back, Future Partners!



Sign Up For Your
Demo & Trial of

*The State of the
American Traveler*
Insights Explorer





David Reichbach

Vice President of Development
dreichbach@futurepartners.com

Thank You!



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Info@futurepartners.com



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



[Livestream Calendar](#)