

A person with blonde hair tied back, wearing a teal long-sleeved shirt, stands on a rugged, reddish-brown rocky cliff. They are looking out over a deep canyon where a river flows. The sky is filled with dramatic, dark clouds illuminated by the warm, orange and yellow light of a setting or rising sun. The overall mood is contemplative and adventurous.

2025 TRAVEL PLANS

American Travel Sentiment Study

WAVE 100:

PAST AND FUTURE FACTORS IMPACTING TRAVEL

SEPTEMBER 30, 2025

Longwoods
INTERNATIONAL

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American Travel Sentiment Wave 100 Highlights

Key Findings:

1. Impacts of COVID-19 on Travel: Post Pandemic Travel Behaviors

One-third (32%) of travelers report that the COVID-19 pandemic changed how they travel now. Among those, two-thirds (62%) now practice increased caution and hygiene practices when traveling. The COVID-19 pandemic, however, also resulted in increased importance and appreciation for travel. One-third (32%) of travelers report that 'travel is more important to me now' after the COVID-19 pandemic, while only 11% report 'travel is less important to me now'. The majority of travelers (58%) either strongly agree or agree that 'I appreciate travel more now, after experiencing the COVID-19 pandemic travel'.

2. Value and Importance of Travel

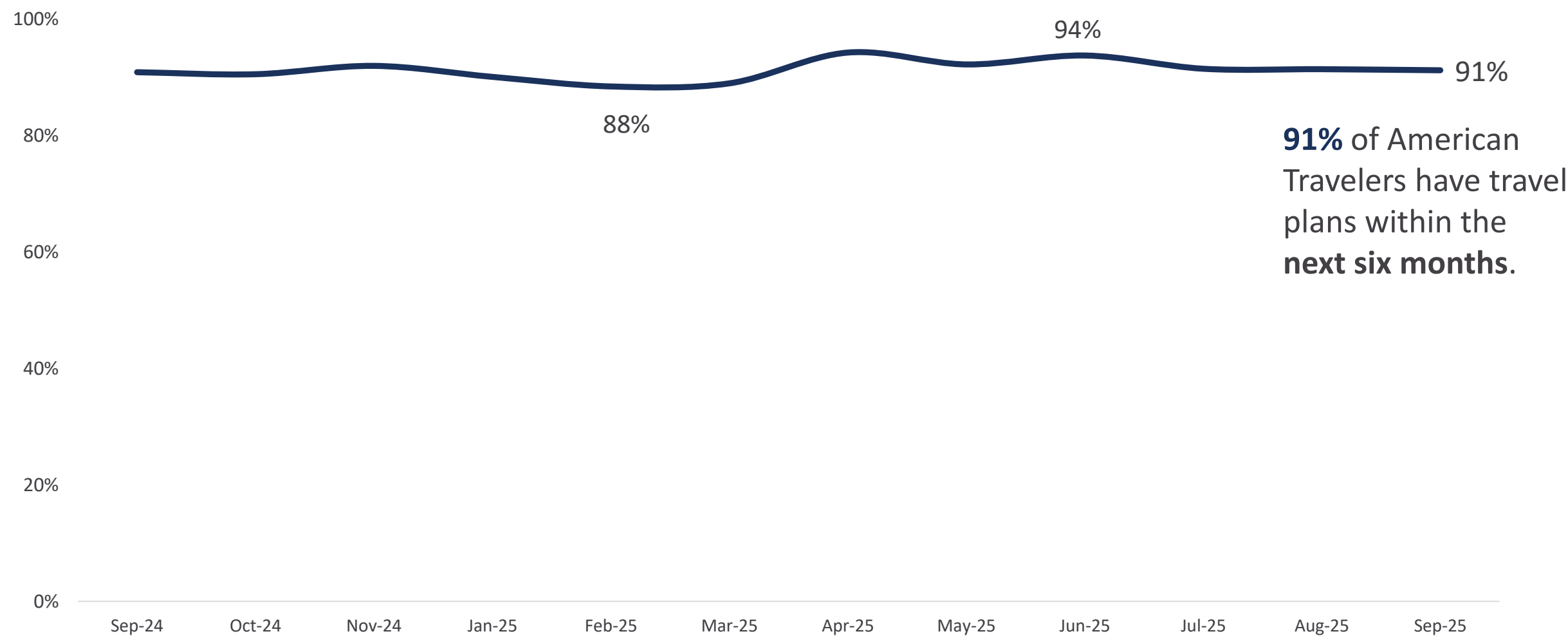
American travelers overwhelmingly place high value and importance on travel. Three-quarter of travelers either strongly agree or agree that 'Vacations are one of the things I most look forward to each year' (75%) and 'I value making experiences over acquiring more material belongings' (72%).

3. Economic Uncertainty and Financial Constraints Could Impact Future Travel Plans

Four in ten travelers (39%) report that there are factors limiting or discouraging them from leisure travel within the next 12 months. Among those, 75% report financial constraints and economic uncertainty as a top factor. Additionally, 64% of travelers either strongly agree or agree that 'Travel is becoming too expensive'. 54%, however, either strongly agree or agree that they are 'willing to reduce spending in other areas of my life to prioritize travel', which indicates that despite financial concerns, travel is still top-of-mind for many travelers.



Travel Plans Within the Next 6 Months

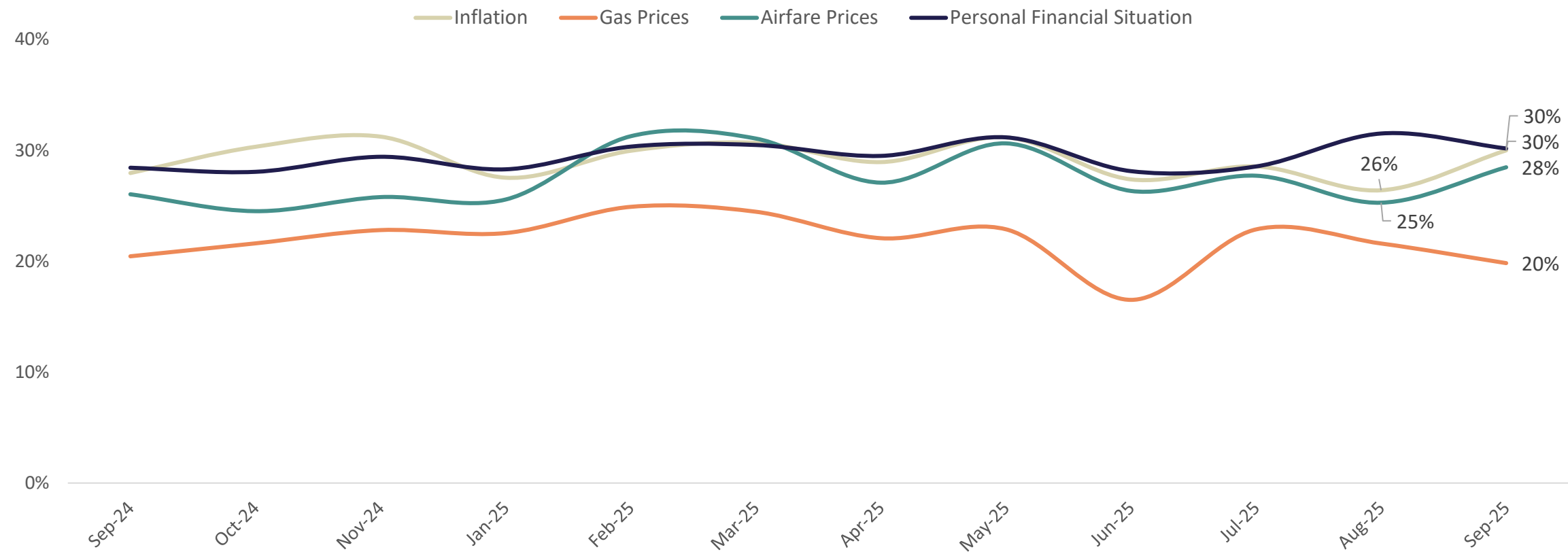


Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Increase in Concerns About Inflation and Airfare Prices Impacting Travel Plans

Concerns Impacting Your Travel Decisions in the Next Six Months

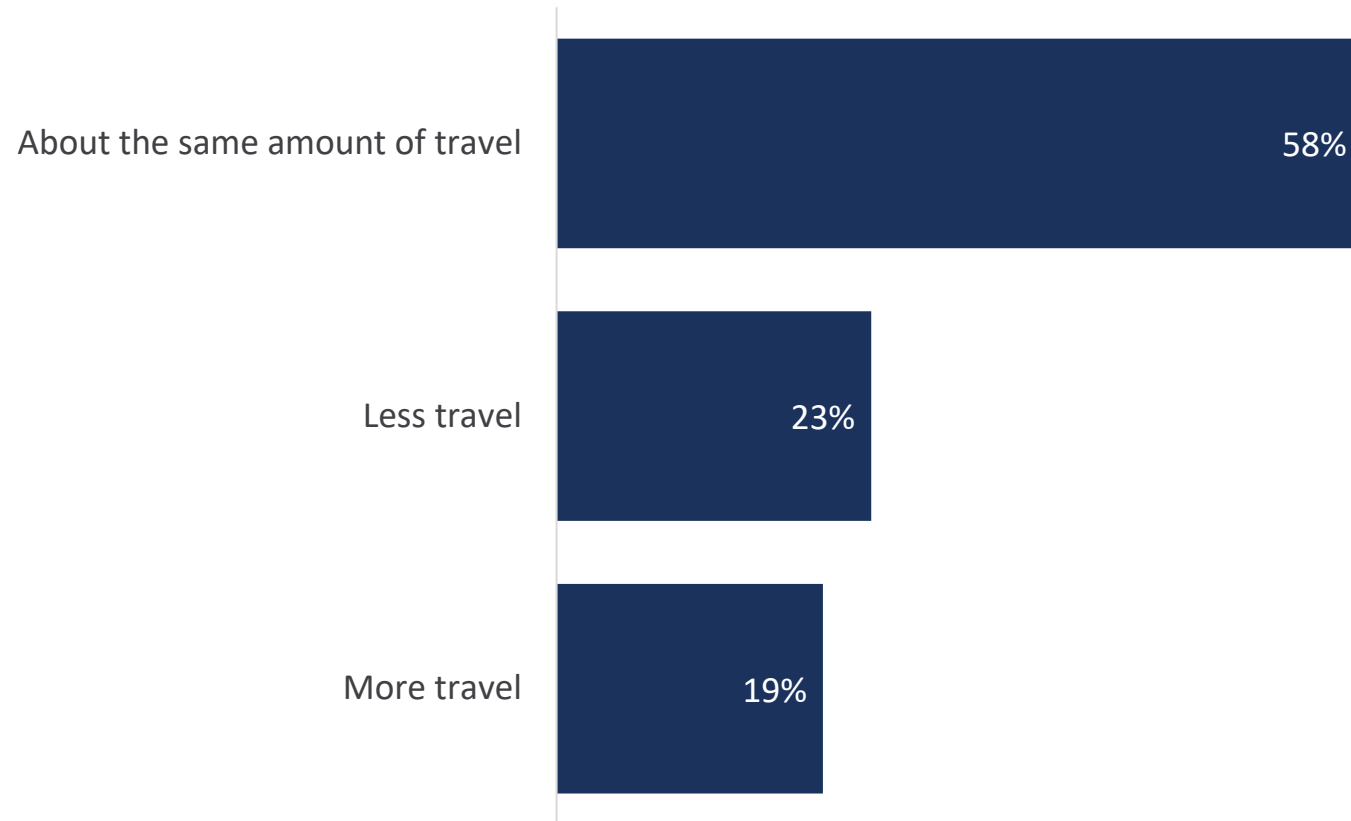
The chart shows the percentage of respondents who rated each factor as “Greatly impact” their travel plans (a 5 on a 1–5 scale) over the period from September 2024 to 2025.



Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers and intend on traveling in the next six months

Majority of Travelers Plan to Travel the Same Amount as Last Year this Fall

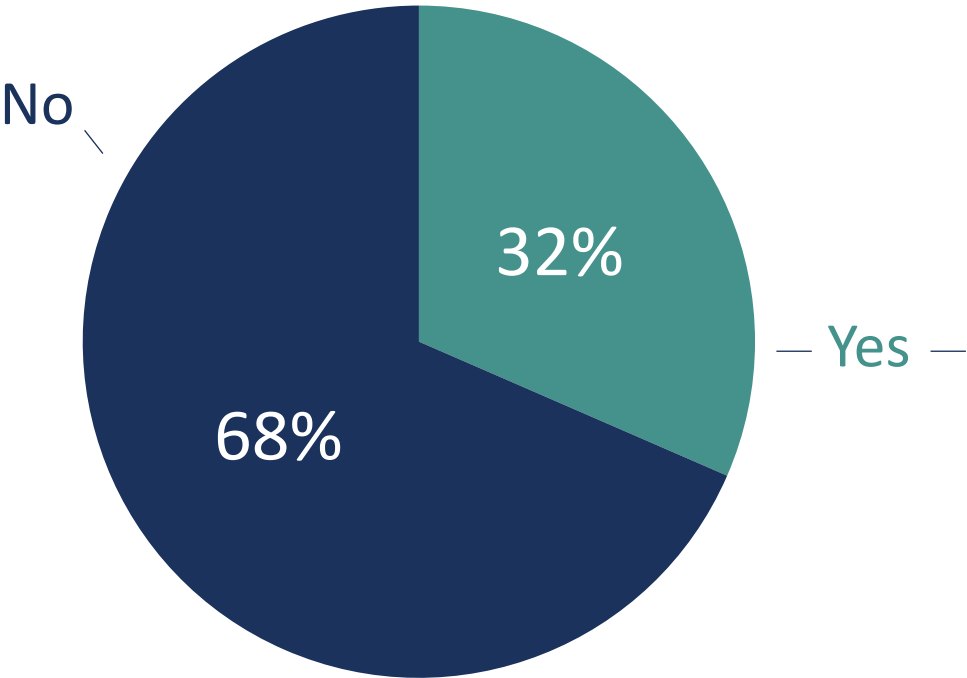
Compared to last year, how often do you plan to travel this fall?



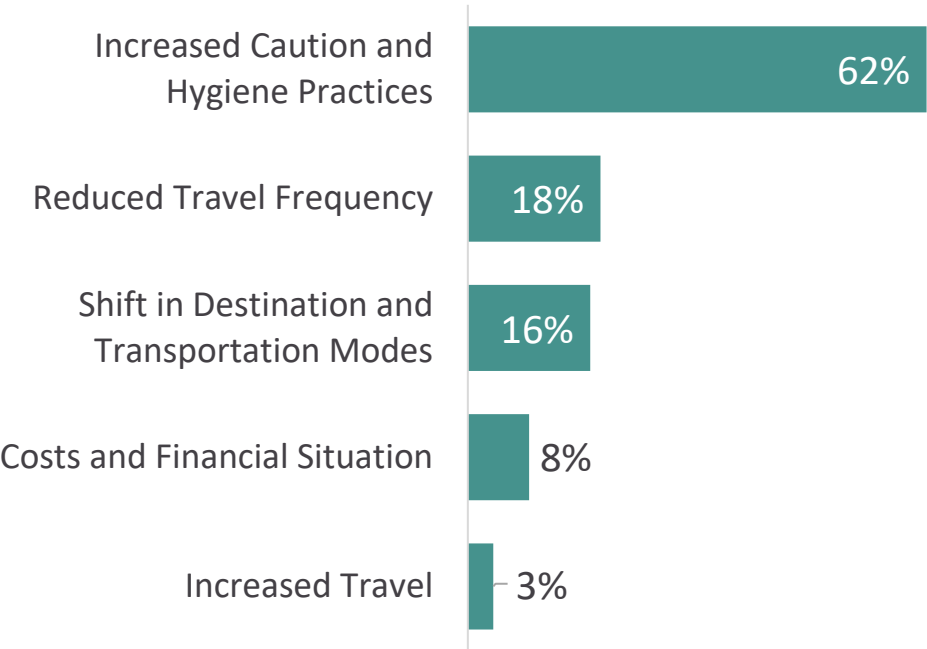
The **majority of travelers (58%)** plan to travel about the same amount this fall compared to last year. A **quarter (23%)**, however, plan to travel less this fall compared to last year.

One-Third of Travelers Report COVID-19 Pandemic Changed How They Travel

Did the COVID-19 pandemic change how you travel now?



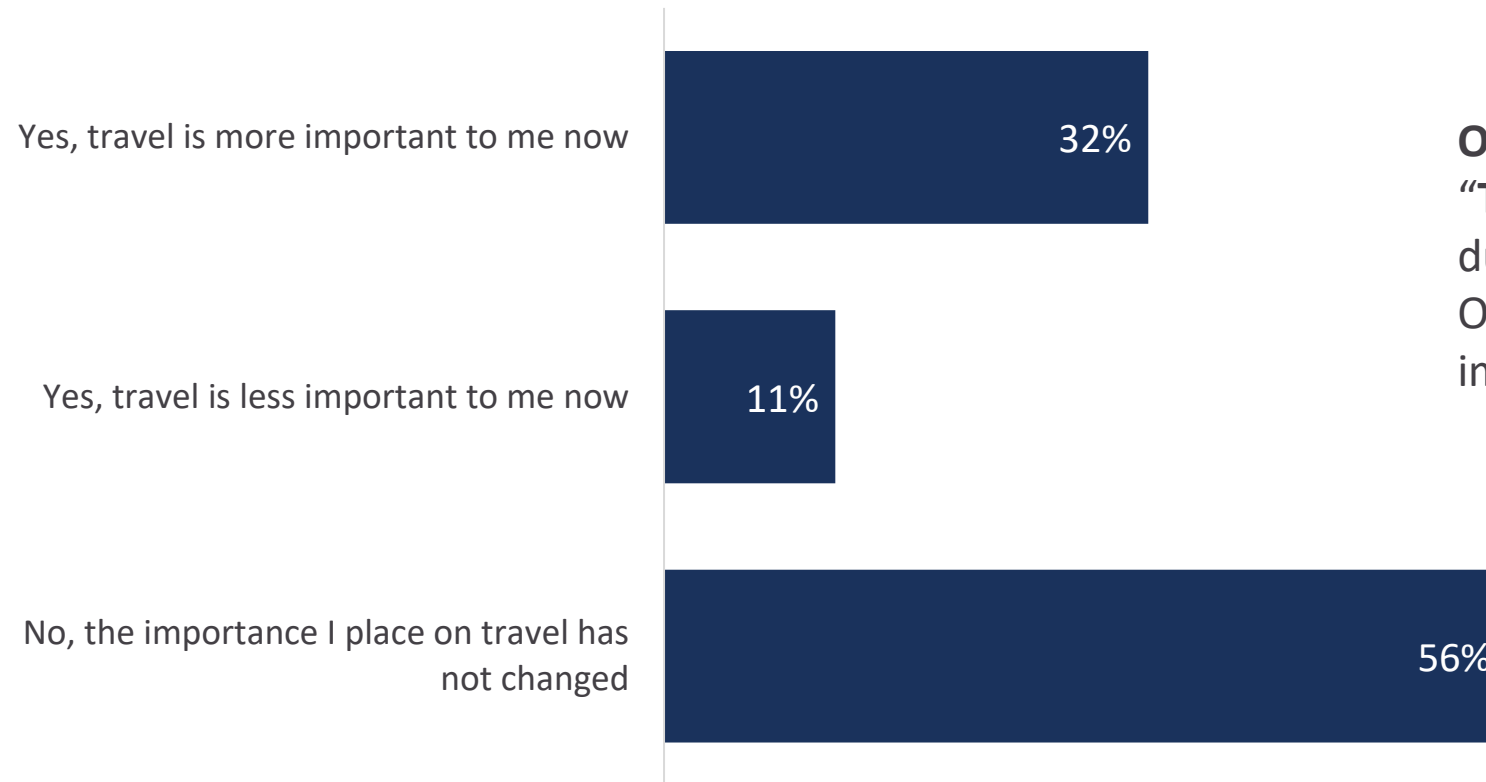
Travel Changes Influenced by the COVID-19 Pandemic



One-third of travelers report that the COVID-19 pandemic changed how they traveled. Among those, the majority (**62%**) indicate they now **practice increased caution and hygiene practices**.

Impact of COVID-19 Pandemic on Importance of Travel

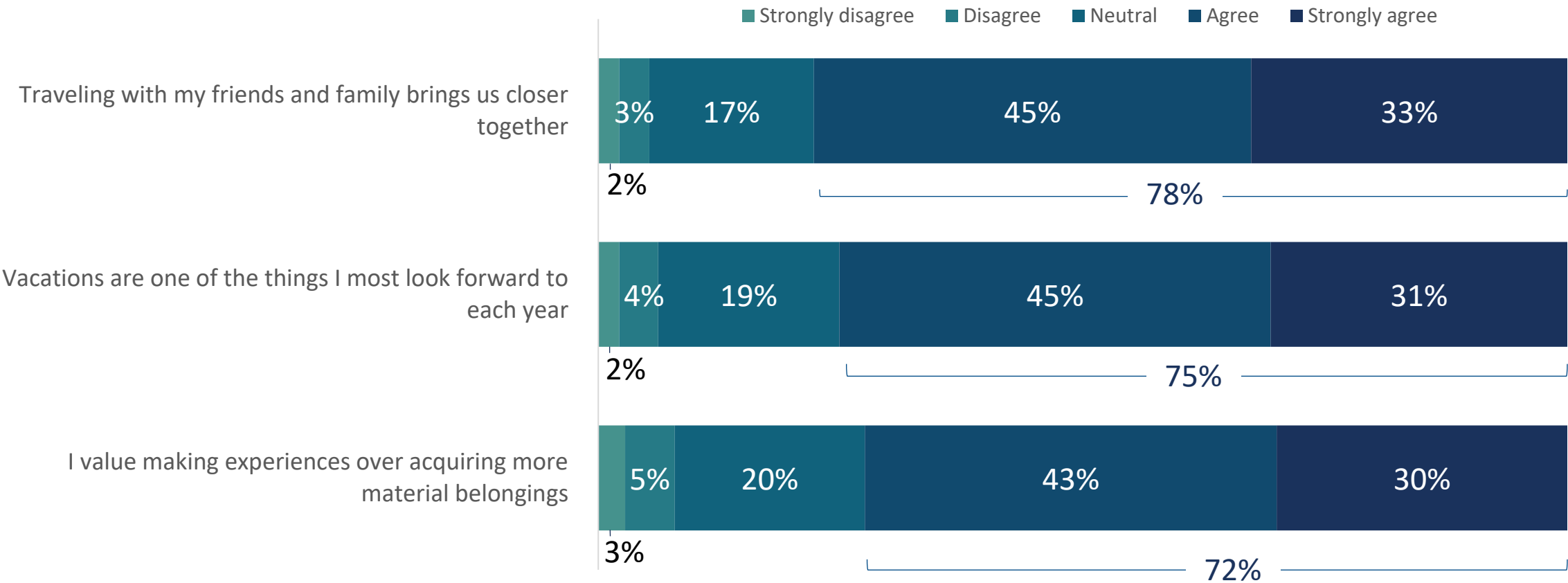
Did the COVID-19 pandemic change the importance you place on travel now?



One-third (32%) of travelers report that “**Travel is more important** to me now” due to the COVID-19 Pandemic. Only **11%** report that “travel is less important to me now”.

Travelers Overwhelmingly Place High Value and Importance on Travel

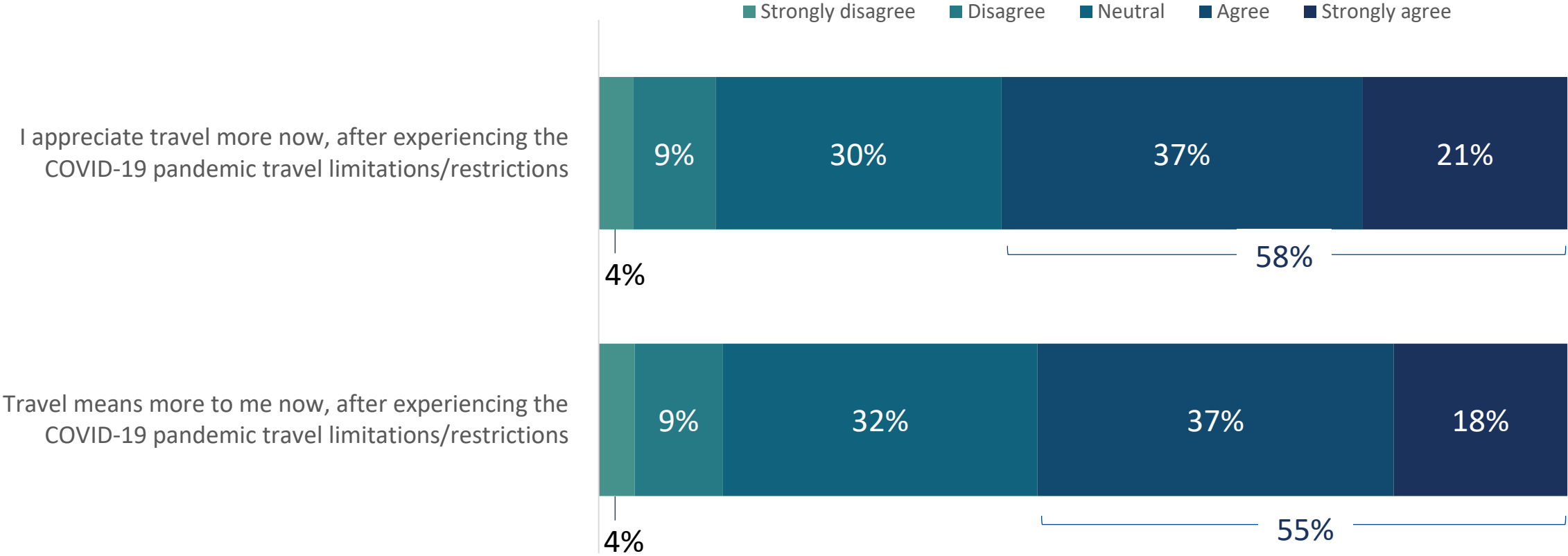
Using the scale below, please indicate your level of agreement with the following statement:



Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers

Majority of Travelers Report Increased Appreciation for Travel Due to Pandemic

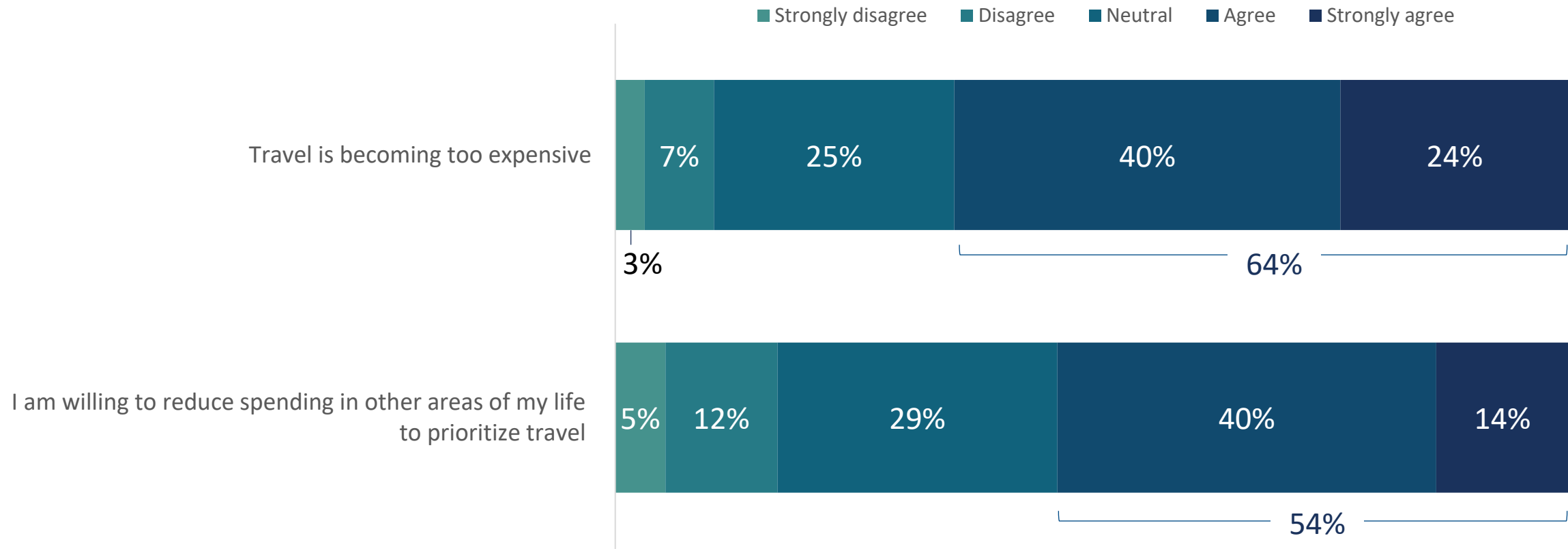
Using the scale below, please indicate your level of agreement with the following statement:



Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers

Majority of Travelers Prioritize Travel Despite Growing Concerns Over Travel Costs

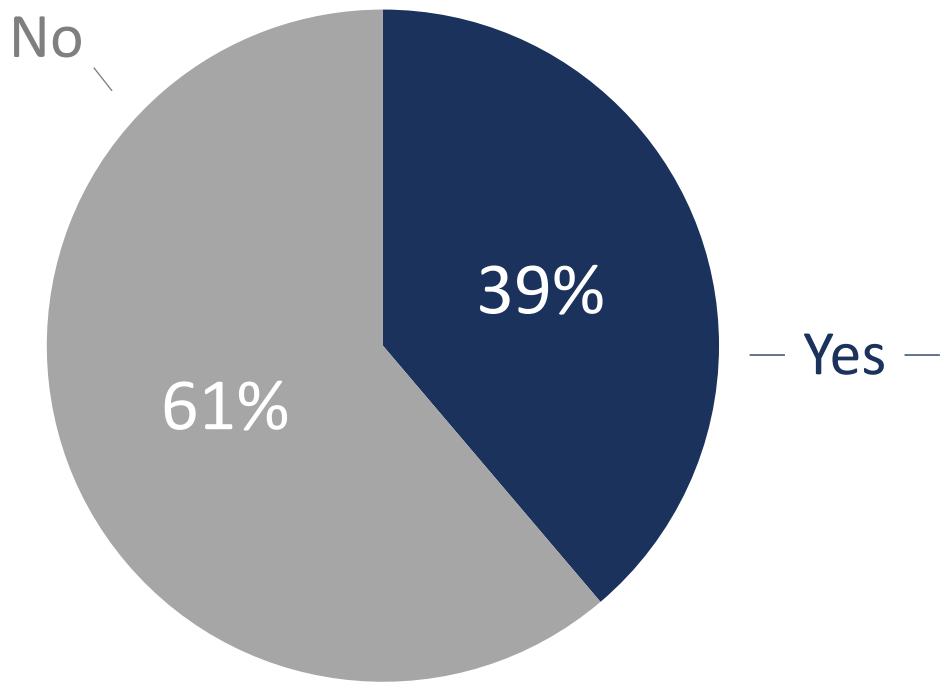
Using the scale below, please indicate your level of agreement with the following statement:



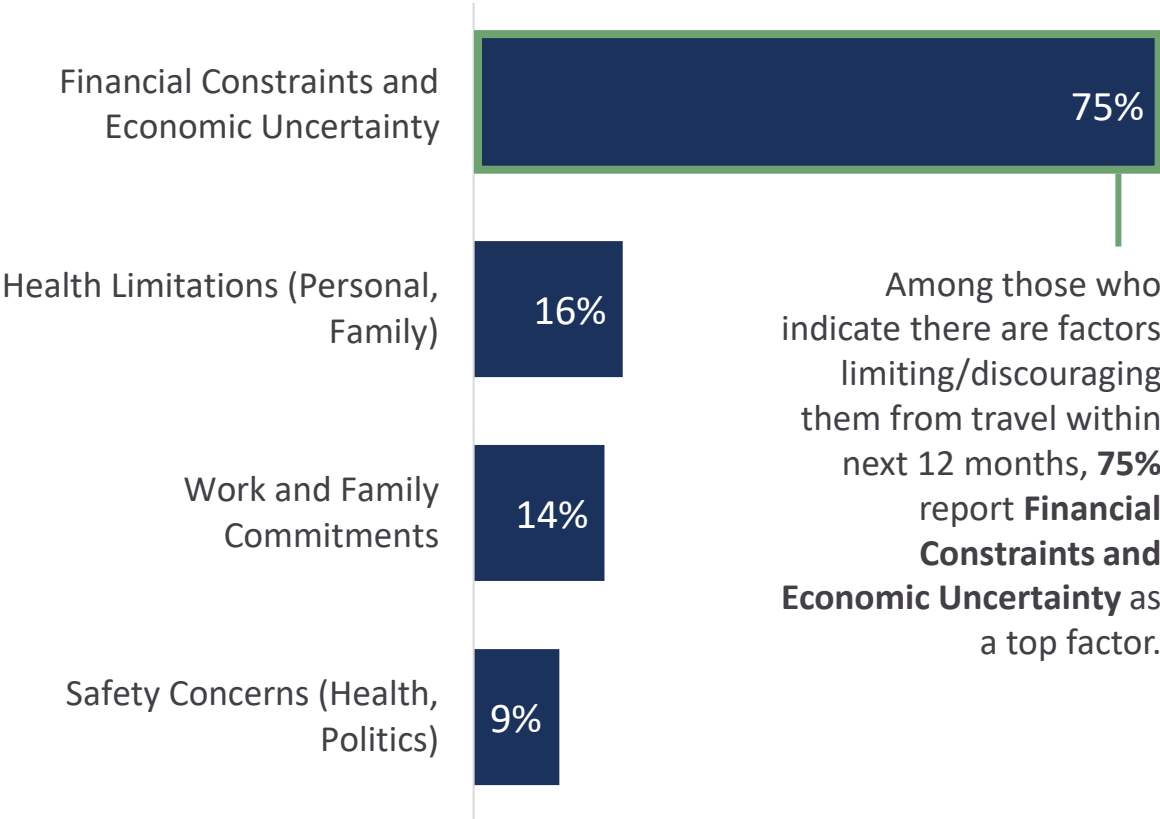
Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers

4 in 10 Travelers Report are Factors Limiting or Discouraging them from Leisure Travel within Next 12 Months

Are there any factors limiting or discouraging you from taking a leisure trip in the next 12 months?



Factors Impacting Leisure Travel within Next 12 Months



Among those who indicate there are factors limiting/discouraging them from travel within next 12 months, **75%** report **Financial Constraints and Economic Uncertainty** as a top factor.

Source: Longwoods International ATS Wave 100
Percentages are based only on respondents who are confirmed travelers

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: September 10, 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
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Additional Resources

Longwoods International Research

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

Miles Partnership Research and Insights

www.MilesPartnership.com/How-We-Think



Thank You!

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